

Multi-Country Survey: December 2020

Q% Report

KEY SPECIFICATIONS

SAMPLE: N=22,507 GENERAL POPULATION ADULTS, AGES 21+ (APPROXIMATELY N=1,100 IN EACH OF 20 MARKETS). A BOOSTER SAMPLE WAS USED TO SECURE N=200 ADDITIONAL ADULT SMOKER INTERVIEWS IN EACH MARKET.

GEOGRAPHY: ARGENTINA, AUSTRALIA, BRAZIL, GERMANY, HONG KONG, ISRAEL, ITALY, JAPAN, KOREA, MEXICO, NETHERLANDS, NORWAY, PHILIPPINES, RUSSIA, SOUTH AFRICA, SPAIN, TAIWAN, UNITED KINGDOM, UNITED STATES, VIETNAM

METHOD: ONLINE

MARGIN OF ERROR: ±1%

WEIGHTING: AT A COUNTRY LEVEL BY AGE, GENDER, REGION, AND TOBACCO PRODUCT USAGE.

FIELDWORK DATES: 8 - 24 DECEMBER 2020

LANGUAGE: NATIVE

RESEARCH SUPPLIER: POVADDO

COMMISSIONED BY: PHILIP MORRIS INTERNATIONAL

Note: Results may not total 100% due to rounding.

S1. Please indicate your gender: [ROTATE]

50% Male

50% Female

S2. How old are you?

29% 21-34

37% 35-54

34% 55+

S6. Please indicate your place of residence: [RANDOMIZE]

- 5% Argentina
- 5% Australia
- 5% Brazil
- 5% Germany
- 5% Hong Kong
- 5% Israel
- 5% Italy
- 5% Japan
- 5% Korea
- 5% Mexico
- 5% Netherlands
- 5% Norway
- 5% Philippines
- 5% Russia
- 5% South Africa
- 5% Spain
- 5% Taiwan
- 5% United Kingdom
- 5% United States
- 5% Vietnam

Please indicate whether you regularly use, occasionally use, formerly use, or have never used each of the following. [RANDOMIZE]

	Regularly use	Occasionally use	Formerly use	Never used
S7. Cigarettes	16%	5%	27%	52%
S8. E-cigarettes	5%	6%	11%	78%
S9. Heat-not-burn tobacco products	4%	5%	8%	84%
S10. Tea bags	51%	32%	9%	9%
S11. Liquid washing detergent	72%	16%	6%	7%

Q1. How optimistic are you that 2021 will be a better year than 2020?

- 65% Total optimistic**
- 31% Total not optimistic**
- 23% Very optimistic
- 42% Somewhat optimistic
- 23% Not very optimistic
- 8% Not optimistic at all
- 3% Unsure

Q2. Still thinking about the year ahead, for each of the following, please indicate whether you believe it will improve, remain the same, or worsen? [RANDOMIZE]

	Will <u>improve</u> in 2021	Will <u>remain the same</u> in 2021	Will <u>worsen</u> in 2021
Global public health	49%	32%	19%
Public health in your country	48%	34%	18%
Your personal financial situation	40%	44%	15%
The global economy	40%	29%	31%
The economy in your country	40%	28%	32%

Switching topics...

Q3. Do you believe governments have a responsibility to embrace the latest scientific and technological developments?

88% Total yes

5% Total no

49% Yes – definitely

39% Yes

4% No

1% No – definitely not

7% Unsure

Q4. [IF Q3="YES – DEFINITELY" OR "YES", ASK:] For each of the following, please indicate whether you believe they have a responsibility to embrace the latest scientific and technological developments. [RANDOMIZE]

	Yes - definitely	Yes	No	No - definitely not	Unsure	Total Yes	Total No
Your national/federal government	52%	43%	2%	1%	2%	95%	3%
Intergovernmental organizations such as the World Health Organization	53%	39%	3%	1%	3%	92%	4%
Your state/regional government	42%	49%	5%	1%	3%	91%	6%
Your local government	39%	50%	6%	1%	4%	89%	8%

Q5. And, how hopeful are you that governments will actually embrace the latest scientific and technological developments?

66% Total hopeful
29% Total not hopeful
21% Very hopeful
44% Somewhat hopeful
24% Not very hopeful
6% Not at all hopeful
5% Unsure

Q6. Generally speaking, do you believe governments have done a good job or a poor job ensuring that society has access to the latest scientific and technological developments?

51% Total good job
41% Total poor job
9% Good job – strongly
42% Good job – somewhat
29% Poor job – somewhat
12% Poor job – strongly
8% Unsure

Q7. Do you believe businesses have a responsibility to embrace the latest scientific and technological developments?

81% Total yes
11% Total no
31% Yes – definitely
50% Yes
10% No
1% No – definitely not
8% Unsure

Q8. And, how hopeful are you that businesses will actually embrace the latest scientific and technological developments?

76% Total hopeful
18% Total not hopeful
23% Very hopeful
53% Somewhat hopeful
15% Not very hopeful
2% Not at all hopeful
6% Unsure

Q9. Generally speaking, do you believe businesses have done a good job or a poor job ensuring that society has access to the latest scientific and technological developments?

66% Total good job

23% Total poor job

11% Good job – strongly

55% Good job – somewhat

20% Poor job – somewhat

3% Poor job – strongly

11% Unsure

Switching topics slightly...

Q10. How important do you believe it is for government to dedicate time and resources to each of the following? [RANDOMIZE]

	Very important	Somewhat important	Not very important	Not at all important	Unsure	Total important	Total not important
Improving the economy	76%	20%	2%	1%	1%	96%	3%
Ensuring quality and affordable healthcare for all	76%	19%	3%	1%	1%	95%	3%
Planning for future pandemics	67%	26%	4%	1%	2%	93%	5%
Improving mental health services	59%	33%	5%	1%	2%	92%	6%
Deploying vaccines to the entire population	64%	24%	6%	3%	3%	88%	8%
Combating climate change	59%	29%	7%	3%	2%	88%	10%
Reducing illegal drug use	58%	29%	8%	2%	2%	87%	10%
Encouraging healthier eating habits	46%	40%	10%	2%	2%	86%	12%
Reducing smoking rates	38%	37%	16%	5%	3%	76%	21%

Switching topics and thinking specifically about smoking issues...

Q11. [IF S7="REGULARLY USE" OR "OCCASIONALLY USE, ASK:] Please indicate whether or not you expect each of the following to give you encouragement to stop smoking. [RANDOMIZE] [% YES RESPONSES ARE SHOWN BELOW]

- 76% Doctor
 - 71% Family members
 - 63% Public health organizations
 - 56% Friends
 - 55% Personal trainer/fitness coach
 - 54% Nurses
 - 54% Dentist
 - 47% Pharmacists
 - 31% Community leaders
 - 29% Government officials
-

Q12. Which of the following statements do you agree with most, even if you don't agree with either fully? [ROTATE]

23% (Some/Other) People say that ALL that is needed is more regulation and taxation on cigarettes in order to make this country smoke-free.

58% (Other/Some) People say that more regulation and taxation on cigarettes is NOT ENOUGH to make this country smoke-free.

19% Unsure

As you go through this survey, there will be a number of references to "smoke-free" or alternative products. Smoke-free products are meant to encompass alternative products for adult smokers which do not burn tobacco or produce smoke like cigarettes. Examples of these products include e-cigarettes and products that heat tobacco instead of burning it to produce a vapor. These products are not risk free and contain nicotine, which is addictive.

Public health experts believe that these products have the potential to reduce the risk to users as compared to continued smoking and should be widely available for smokers to use instead of cigarettes. Others disagree saying the science has not been fully proven and they could be appealing to non-smokers.

Q13. Have you ever heard of or are you aware of something called an e-cigarette, also referred to as an electronic cigarette or a vape?

- 90% Yes
 - 10% No
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Q14. Have you ever heard of or are you aware of products that heat tobacco instead of burning it, also referred to as heat-not-burn tobacco products?

51% Yes
49% No

Q15. [IF Q13="YES" OR Q14="YES", ASK:] And, in the past six months have you seen, read, or heard something about e-cigarettes or heat-not-burn tobacco products?

47% Yes
40% No
14% Unsure

Q16. [IF Q15="YES", ASK:] And, did what you saw, read, or heard about e-cigarettes or heat-not-burn tobacco products cause any confusion about these products? In other words, did you receive any conflicting or unclear information about either e-cigarettes or heat-not-burn tobacco products?

43% Yes
41% No
16% Unsure

Q17. Please indicate whether you agree or disagree with the following statement:

Smokers who would otherwise continue smoking cigarettes should have access to, and accurate information about, smoke-free alternatives which are scientifically proven to be better than continued smoking.

77% Total agree
13% Total disagree
36% Strongly agree
40% Somewhat agree
8% Somewhat disagree
5% Strongly disagree
10% Unsure

Q18. Please indicate whether you agree or disagree with the following statement:

Encouraging adult smokers who would otherwise continue to smoke cigarettes to completely switch to smoke-free alternative products can complement other efforts to reduce the societal harm caused by smoking cigarettes.

71% Total agree

18% Total disagree

26% Strongly agree

45% Somewhat agree

11% Somewhat disagree

7% Strongly disagree

11% Unsure

Q19. Do you support or oppose tobacco companies working with governments, regulators, and public health experts to ensure that smokers have access to and accurate information about alternative products like e-cigarettes and heat-not-burn tobacco products?

68% Total support

20% Total oppose

28% Strongly support

39% Somewhat support

12% Somewhat oppose

9% Strongly oppose

12% Unsure

Q20. Do you believe the government needs to consider the role alternative products can play in making this country smoke-free?

73% Total yes

16% Total no

29% Yes – definitely

44% Yes

10% No

5% No – definitely

11% Unsure

Q21 [IF S7="REGULARLY USE" OR "OCCASIONALLY USE, ASK:] Please indicate whether you agree or disagree with the following statement:

I would be more likely to consider switching to alternative products like e-cigarettes and heat-not-burn tobacco products if I had clarity on how these products differ from cigarettes and the science behind them.

76% Total agree
18% Total disagree
35% Strongly agree
41% Somewhat agree
9% Somewhat disagree
8% Strongly disagree
6% Unsure

Q22. If it was possible to end cigarette sales within 10-15 years in this country by having all smokers quit tobacco and nicotine altogether, and those who don't switch to scientifically proven alternative products, do you believe the government should dedicate time and resources to making this a reality?

67% Total yes
21% Total no
27% Yes – definitely
39% Yes
15% No
7% No – definitely not
12% Unsure

Now, just a few more questions for statistical purposes...

D1. Do you have a university-level education?

60% Yes
40% No

D2. [IF D1="YES", ASK:] Do you have a post-graduate or advanced degree in law, medicine, science, engineering, or technology? [MULTIPLE SELECT]

5% Yes – LAW
4% Yes – MEDICINE
9% Yes – SCIENCE
13% Yes – ENGINEERING
10% Yes - TECHNOLOGY
62% No [EXCLUSIVE]

D3. In what class do you consider your household to be?

- 2% High income
- 15% Upper middle income
- 53% Middle income
- 22% Lower middle income
- 8% Low income

THANK AND CLOSE SURVEY
