

Multi-Country Opinion Research Survey

TOPLINE RESULTS – GLOBAL AVERAGE

KEY SPECIFICATIONS

AUDIENCE: LEGAL AGE, GENERAL POPULATION ADULTS

SAMPLE SIZE: n=31,002

GEOGRAPHY:

ARGENTINA	GREECE	ROMANIA
AUSTRALIA	INDIA	RUSSIA
AUSTRIA	INDONESIA	SERBIA
BRAZIL	ITALY	SINGAPORE
BULGARIA	JAPAN	SLOVAKIA
COLOMBIA	MALAYSIA	SOUTH AFRICA
CZECH REPUBLIC	MEXICO	SOUTH KOREA
EGYPT	NEW ZEALAND	SPAIN
FRANCE	PHILIPPINES	UK
GERMANY	POLAND	UKRAINE
		USA

METHODOLOGY: ONLINE

FIELDWORK DATES: 4-19 SEPTEMBER 2018

RESEARCH PROVIDER: IPSOS

NOTE: Results may not add up to 100% due to rounding.

S1. First, how old are you?

Under legal age (LA)	(TERMINATE INTERVIEW)
LA-24	9%
25-29	14%
30-34	9%
35-39	10%
40-44	9%
45-49	9%
50-54	9%
55-59	8%
60-64	6%
65 or older	17%

[PROGRAMMING NOTE: LEGAL AGE TO BE ADJUSTED BASED ON MARKET MINIMUM AGE LAWS FOR THE PURCHASE OF CIGARETTES, E-CIGARETTES, AND OTHER TOBACCO & NICOTINE CONTAINING PRODUCTS]

S2. Please indicate your gender.

Male	49%
Female	51%

Are you – or is any member of your immediate family – currently employed with/as: (% Yes)

(RANDOMIZE)

S3.	An advertising or public relations agency	--%
S4.	A newspaper, radio, or television station	--%
S5.	A market research or opinion research firm	--%
S6.	An elected official	--%
S7.	A senior or policy making role in government	--%

[IF 'YES' TO ANY S3-S7 – TERMINATE INTERVIEW]

Q1. Generally speaking, do you believe the news reporting about companies which have historically bad reputations is accurate and honest?

Yes, news reporting is accurate and honest	23%
No, news reporting is <u>not</u> accurate and honest	34%
Unsure	42%

Please indicate how much corporate news you believe to be true about each of the following industries.
(MEAN SCORE 0-100%)

(RANDOMIZE)

Q2a.	Food industry	52%
Q2b.	Oil and gas industry	49%
Q2c.	Tobacco industry	48%
Q2d.	Conglomerates/Multinational companies	47%
Q2e.	Banking and financial services industry	51%

Please indicate how important you believe it is for the government to dedicate time and resources to each of the following

(RANDOMIZE)	Very important	Somewhat important	Not very important	Not important at all	Unsure	Very / Somewhat important	Not very / Not important at all
Q3a. Obesity	40%	42%	13%	4%	1%	82%	16%
Q3b. Alcohol consumption and binge drinking	43%	39%	13%	4%	2%	81%	17%
Q3c. Healthier food products (e.g. those with less salt, less sugar, less saturated and trans fat)	47%	38%	11%	3%	1%	84%	14%
Q3d. Smoking	43%	37%	14%	5%	2%	79%	19%
Q3e. Air pollution	65%	26%	5%	2%	1%	92%	7%
Q3f. Mental health	56%	34%	7%	2%	1%	90%	9%
Q3g. Sexually transmitted diseases	52%	35%	9%	3%	2%	87%	12%
Q3h. Unwanted pregnancies/Family planning	41%	39%	14%	4%	2%	80%	18%
Q3i. Opioid abuse	45%	33%	12%	3%	6%	79%	15%

Q4. Please indicate whether you agree or disagree with the following statement:

In today's society, information overload has become a source of anxiety for everyday people.

Strongly agree	32%
Somewhat agree	51%
Somewhat disagree	11%
Strongly disagree	3%
Unsure	3%
Total agree	83%
Total disagree	14%

Q5. Please indicate whether you agree or disagree with the following statement:

Birth control (e.g. contraceptive pills, condoms, etc.) should be widely and freely available in this country.

Strongly agree	54%
Somewhat agree	32%
Somewhat disagree	8%
Strongly disagree	3%
Unsure	3%
Total agree	86%
Total disagree	11%

Q6. Thinking about the public health priorities in this country, how important of a role do you believe technology and innovation can play in addressing these issues?

Very important role	52%
Somewhat important role	39%
Not very important role	5%
No role at all	1%
Unsure	3%
Very/somewhat important role	91%
Not very/no role at all	6%

Q7. And, do you believe government and public health authorities have done a good job or a poor job embracing technology and innovation as ways to improve public health in this country?

Good job – strongly	7%
Good job	32%
Poor job	35%
Poor job – strongly	14%
Unsure	11%
Total good job	40%
Total bad job	49%

Q8. Generally speaking, do you believe authorities in this country have done a good job or a poor job ensuring everyone has access to the latest innovations and advancements that can improve public health?

Good job – strongly	6%
Good job	28%
Poor job	38%
Poor job – strongly	18%
Unsure	9%
Total good job	35%
Total bad job	56%

Q9. Broadly speaking, do you believe that consumer goods companies have an obligation to continually research and innovate their products in the interest of public health?

Yes – definitely	47%
Yes	39%
No	7%
No – definitely not	2%
Unsure	5%
Total yes	86%
Total no	8%

Q10. If a company developed a better product for its consumers, do you believe consumers have a right to know this better alternative exists?

Yes – definitely	60%
Yes	34%
No	3%
No – definitely not	1%
Unsure	3%
Total yes	94%
Total no	3%

Thinking specifically about smoking...

Q11. Please indicate whether you agree or disagree with the following statement:

It is important to provide smokers that are interested in alternatives to smoking with less risky alternatives than cigarettes.

Strongly agree	47%
Somewhat agree	36%
Somewhat disagree	7%
Strongly disagree	5%
Unsure	5%
Total agree	83%
Total disagree	12%

Q12. If a new alternative product was shown to have the potential to reduce the risk of smoking as compared to cigarettes, do you believe adult smokers should have access to these alternative products?

Yes – definitely	48%
Yes	40%
No	5%
No – definitely not	2%
Unsure	5%
Total yes	88%
Total no	7%

Q13. And, do you believe that adult smokers should have the right to access information about a new alternative product if it was shown to have the potential to reduce the risk of smoking as compared to cigarettes?

Yes – definitely	52%
Yes	40%
No	3%
No – definitely not	1%
Unsure	4%
Total yes	92%
Total no	5%

You will now be given a number of statements that have been made about these new potential alternative products for adult smokers. For each, please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree

(RANDOMIZE)	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Unsure	Total agree	Total disagree
Q14. Allowing reduced risk alternatives to cigarettes and encouraging adult smokers to switch completely to these products can complement other efforts to reduce the harm caused by cigarettes.	39%	45%	8%	3%	4%	85%	11%
Q15. The government should do all they can to encourage adult smokers who don't quit cigarettes to completely switch to better alternative products.	37%	40%	13%	6%	4%	77%	19%
Q16. In order to allow adult smokers to make informed choices about switching to reduced risk products, governments and international health bodies need to study the risk profile of these products compared to cigarettes.	50%	38%	6%	2%	3%	88%	8%
Q17. Adult smokers should have the right to access information about the scientific research of reduced risk products in order to make informed decisions about the use of these products.	54%	38%	5%	2%	2%	91%	6%
Q18. Prior to being introduced to the market, reduced risk alternatives to cigarettes must have robust scientific testing.	66%	26%	4%	1%	3%	92%	6%
Q19. After reduced risk alternatives have been introduced to the market, their use and impact need to be monitored to ensure they are reducing the harm caused by cigarettes.	60%	31%	4%	1%	3%	91%	6%

Q20. For smokers who do not want to quit smoking cigarettes, would you find it acceptable if the government also encouraged them to switch to less harmful alternatives in addition to encouraging them to quit smoking altogether?

Yes – definitely acceptable	40%
Yes – somewhat acceptable	42%
No – not really acceptable	9%
No – not at all acceptable	4%
Unsure	6%
Total yes	82%
Total no	13%

Lastly, just a few final questions for statistical purposes.

D1. How interested would you say you are in politics and public policy issues? Would you say you are...

Very interested	34%
Somewhat interested	48%
Not very interested	14%
Not at all interested	4%

D2. In the past week, how often would you say you have talked about government, politics, or society with your family, friends or co-workers?

Several times	46%
Once or twice	39%
Not at all	15%

[QUESTION D3 ONLY ASKED IN NON-COMPULSORY VOTING COUNTRIES; n=27,002]

D3. Thinking about national level elections in this country, do you tend to vote in these elections all of the time, most of the time, some of the time, rarely, or never?

All of the time	58%
Most of the time	24%
Some of the time	9%
Rarely	5%
Never	5%

D4. Generally speaking, how important is for you to have a healthy lifestyle, namely through your daily routine (e.g. balanced diet, fitness)?

Very important	55%
Somewhat important	39%
Not very important	5%
Not important at all	1%

For each of the following products, please indicate whether you are a regular user, occasional user, former user, or complete non-user.

(RANDOMIZE)	Regular user	Occasional user	Former user	Complete non-user	Regular /Occasional user	Former/ Complete non-user
D5. Cigarettes	18%	10%	20%	51%	29%	71%
D6. Cigars	3%	9%	10%	78%	12%	88%
D7. Pipe tobacco	2%	5%	7%	87%	6%	94%
D8. E-cigarettes	4%	8%	8%	81%	12%	88%
D9. Heat-not-burn tobacco products	2%	6%	4%	88%	8%	92%
D10. Smokeless tobacco products (e.g. snus, oral snuff, etc.)	2%	4%	5%	89%	7%	93%

[QUESTIONS D11, D12, & D13 ASKED AMONG ADULTS CONSUMING ONLY COMBUSTIBLE TOBACCO PRODUCTS; n=4,547]

D11. Generally speaking, would you like to give up smoking, or not?

Yes	61%
No	18%
Unsure	20%

D12. Please indicate whether you agree or disagree with the following statement:

I would consider switching to less harmful alternatives to cigarettes if they were legal, met quality and safety standards, and were conveniently available like regular tobacco products.

Strongly agree	46%
Somewhat agree	34%
Somewhat disagree	7%
Strongly disagree	5%
Unsure	9%
Total agree	80%
Total disagree	11%

D13. Please indicate whether you agree or disagree with the following statement:

I would be more likely to consider switching to less harmful alternatives to cigarettes if the government provided clarity on the health risks of these products compared to cigarettes.

Strongly agree	47%
Somewhat agree	33%
Somewhat disagree	7%
Strongly disagree	5%
Unsure	8%
Total agree	80%
Total disagree	12%
