

Public Opinion Survey: April 2023

Q% Report: Global

KEY SPECIFICATIONS

SAMPLE: N=30,591 legal-age general population adults (21+) across 15 markets (approximately n=2,000 per market)

GEOGRAPHY: Argentina, Austria, Brazil, Colombia, Dominican Republic, Korea, Malaysia, Mexico, Pakistan, Philippines, Serbia, South Africa, Tunisia, United Kingdom, United States.

METHODOLOGY: Online

MARGIN OF ERROR: ±0.6% at the global level

WEIGHTING: This survey was fielded online in all countries, thus the results are representative of the online population in each country. The data has been weighted by the following variables by country as needed to align with national population statistics: age, gender, and nicotine product consumption.

FIELDWORK DATES: 30 March - 20 April 2023

LANGUAGE: Native

RESEARCH AGENCY: Povaddo

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

S0. Please indicate your place of residence: [RANDOMIZE]

- 7% Argentina
 - 7% Austria
 - 7% Brazil
 - 7% Colombia
 - 7% Dominican Republic
 - 7% South Korea
 - 7% Malaysia
 - 7% Mexico
 - 7% Pakistan
 - 7% Philippines
 - 7% Serbia
 - 7% South Africa
 - 7% Tunisia
 - 7% United Kingdom
 - 7% United States
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S1. What is your age?

- 40% 21-34
- 36% 35-54
- 24% 55+

S2. What is your gender?

50% Male
50% Female
*% Other
*% Prefer not to say

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

<i>(RANDOMIZE)</i>	Yes	No
A newspaper, radio, or television station	0%	100%
A market research or opinion research firm	0%	100%
An elected official or in a policy making role in government	0%	100%
A tobacco or nicotine product manufacturer	0%	100%

D1-6. Please indicate whether you are a regular consumer, occasional consumer, former consumer, or have never consumed each of the following products.

<i>(RANDOMIZE)</i>	Regular consumer	Occasional consumer	Former consumer	Never consumed	TOTAL CONSUMER	TOTAL NONCONSUMER
Cigarettes	15%	4%	20%	62%	19%	81%
E-cigarettes / Electronic cigarettes / Vapes	3%	2%	12%	83%	5%	95%
Heated tobacco products	2%	2%	9%	87%	5%	95%
Oral tobacco or nicotine products	3%	2%	11%	84%	5%	95%
Individual coffee capsules / pods	22%	28%	10%	40%	50%	50%
Liquid laundry detergent	59%	20%	5%	16%	79%	21%

Q1. Generally speaking, do you believe things in [COUNTRY] are headed in the right direction or wrong direction? And, do you feel strongly about that?

42% TOTAL RIGHT DIRECTION
51% TOTAL WRONG DIRECTION
13% Right direction – strongly
29% Right direction – somewhat
24% Wrong direction – somewhat
28% Wrong direction – strongly
6% Unsure

Q2. And, in the past few years, do you believe [COUNTRY] has been making progress addressing the big issues facing the country?

39% TOTAL YES
54% TOTAL NO
14% Yes – definitely
25% Yes
30% No
24% No – definitely not
7% Unsure

Q3. Which of the following do you think will become obsolete in this country in the next 10-20 years due to new technologies and innovations? Please select all that apply.

(RANDOMIZE)
46% Cash
41% Alarm clocks
41% Gasoline cars
34% Fossil fuel energy
31% Digital cameras
21% Cigarettes
13% None of the above

Q4. Generally speaking, do you believe the government moves too slow, too fast, or at about the right speed embracing technological breakthroughs and innovation?

55% Too slow
6% Too fast
28% At about the right speed
11% Unsure

Q5. And, do you believe there have ever been negative consequences as a result of government being too slow to embrace technological breakthroughs and innovation?

- 66% Yes
- 15% No
- 19% Unsure

[IF Q5="YES", ASK:]

Q6. And, in which areas do you believe there have been negative consequences as a result of government moving too slow to embrace technological breakthroughs and innovation? Please select all which apply.

(RANDOMIZE)

- 74% Public health
- 61% Green technology to decarbonize the planet
- 39% Cryptocurrencies and digital assets
- 38% Smoke-free technology to end cigarette sales
- 25% Micro mobility (e-scooters)
- 4% Unsure
- 2% None of the above

You will now be shown a list of potential actions which some have suggested that governments need to undertake in order to ensure people in this country can benefit from technological breakthroughs.

Q7a-e. Please indicate whether or not you expect the government to undertake each of the following.

	Yes	No	Unsure
<i>(RANDOMIZE)</i>			
Implement regulations which facilitate access to innovations and technological breakthroughs	72%	17%	11%
Review innovations and technological breakthroughs in a timely fashion	71%	19%	10%
Communicate to the public fact-based information about innovations and technological breakthroughs	71%	19%	10%
Implement safeguards to protect the public from unintended consequences of innovations and technological breakthroughs	68%	20%	12%

Ensure innovations are affordable by taxing them appropriately	63%	23%	14%
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Q8. How would you feel if you learned that a breakthrough which could help address a societal issue was not made available to the public due to government inaction?

- 82% TOTAL FRUSTRATED**
- 13% TOTAL NOT FRUSTRATED**
- 43% Very angry, frustrated, or upset
- 39% Somewhat angry, frustrated, or upset
- 10% Not that angry, frustrated, or upset
- 3% Not at all angry, frustrated, or upset
- 5% Unsure

Switching topics...

Q9. Please indicate whether you agree or disagree with the following statement:

I am provided with the right tools and information by the government and public health authorities to make the best choices for my health.

- 54% TOTAL AGREE**
- 42% TOTAL DISAGREE**
- 18% Strongly agree
- 36% Somewhat agree
- 25% Somewhat disagree
- 17% Strongly disagree
- 5% Unsure

Q10. Do you believe government and public health authorities have done a good job or a poor job embracing new technologies and innovations designed to improve public health in this country?

- 43% TOTAL GOOD JOB**
- 46% TOTAL POOR JOB**
- 10% Good job – strongly
- 34% Good job
- 33% Poor job
- 13% Poor job – strongly
- 11% Unsure

Q11. Generally speaking, do you believe government and public health authorities in this country

have done a good job or a poor job ensuring everyone has access to the latest innovations and technologies that can improve public health?

40%	TOTAL GOOD JOB
52%	TOTAL POOR JOB
10%	Good job – strongly
29%	Good job
36%	Poor job
16%	Poor job – strongly
9%	Unsure

Still thinking about the topic of public health...

You will now be shown a number of different statements. Please indicate whether you agree or disagree with each. (RANDOMIZE)

Q12. Public health authorities should make decisions based on science and facts.

91%	TOTAL AGREE
5%	TOTAL DISAGREE
63%	Strongly agree
29%	Somewhat agree
4%	Somewhat disagree
1%	Strongly disagree
3%	Unsure

Q13. Public health policy needs to be re-examined on a regular basis to ensure it keeps up with scientific and technological breakthroughs.

92%	TOTAL AGREE
4%	TOTAL DISAGREE
66%	Strongly agree
27%	Somewhat agree
3%	Somewhat disagree
1%	Strongly disagree
3%	Unsure

Q14. Public health authorities should fully embrace and seek to learn from evidence and data from other countries.

88% TOTAL AGREE
8% TOTAL DISAGREE
52% Strongly agree
36% Somewhat agree
6% Somewhat disagree
2% Strongly disagree
4% Unsure

Q15. Do you see new technology and innovation playing a role in reducing smoking rates in this country?

50% TOTAL YES
38% TOTAL NO
21% Yes – definitely
29% Yes
29% No
9% No – definitely not
12% Unsure

Q16. As you may or may not know, harm reduction is an approach which seeks to minimize the negative health impacts of harmful behaviors when it is not possible to completely stop these behaviors. Do you believe harm reduction is an appropriate approach to cigarette smoking?

63% TOTAL YES
24% TOTAL NO
24% Yes – definitely
39% Yes
18% No
5% No – definitely not
14% Unsure

Q17. Do you believe the government needs to consider the role alternative products, like e-cigarettes and heated tobacco products, can play in eradicating cigarette smoking in this country?

56% TOTAL YES
32% TOTAL NO
20% Yes – definitely
35% Yes

22% No
 10% No – definitely not
 13% Unsure

Q18a-c. For each of the following, please indicate whether you believe they have a responsibility to objectively review and consider scientific evidence about smoke-free alternative products such as cigarettes and heated tobacco products.

<i>(RANDOMIZE)</i>	Yes - definitely	Yes	No	No - definitely not	Unsure	TOTAL YES	TOTAL NO
Your national/federal government	37%	40%	12%	3%	8%	77%	15%
Independent scientific bodies	30%	45%	12%	3%	10%	76%	15%
Public health charities/nongovernmental organizations (NGOs)	32%	43%	13%	3%	9%	75%	16%

Q19. If the data and evidence indicated that smoke-free products were a better alternative than cigarettes, would you support or oppose your government enacting policies that encouraged smokers to switch to these products?

71% TOTAL SUPPORT
20% TOTAL OPPOSE
 31% Strongly support
 40% Somewhat support
 11% Somewhat oppose
 9% Strongly oppose
 9% Unsure

Q20. Do you believe smokers who would otherwise continue to smoke should have the same level of access to, and information about, a range of smoke-free products so that they can find whichever product is right for them as an alternative to smoking.

80% TOTAL YES
12% TOTAL NO
 38% Yes – definitely
 42% Yes
 8% No
 4% No – definitely not

8% Unsure

[ASK TO REGULAR OR OCCASIONAL CONSUMERS OF ANY NICOTINE CONTAINING PRODUCT] Q21.

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

The government needs to consider the views of adult smokers and adults who consume nicotine products when deciding how to tax and regulate different nicotine products.

81% TOTAL AGREE
14% TOTAL DISAGREE
42% Strongly agree
40% Somewhat agree
9% Somewhat disagree
5% Strongly disagree
5% Unsure

[ASK TO EXCLUSIVE CIGARETTE SMOKERS]

Q22. Please indicate whether you agree or disagree with the following statement.

As a smoker, I feel discriminated against.

58% TOTAL AGREE
39% TOTAL DISAGREE
25% Strongly agree
33% Somewhat agree
20% Somewhat disagree
19% Strongly disagree
4% Unsure

[ASK TO EXCLUSIVE CIGARETTE SMOKERS]

Please indicate whether you agree or disagree with each of the following statements. (RANDOMIZE)

Q23a. I would be more likely to consider smoke-free alternatives if I had clarity on how these products differ from cigarettes.

76% TOTAL AGREE
20% TOTAL DISAGREE
40% Strongly agree
36% Somewhat agree
11% Somewhat disagree
9% Strongly disagree
5% Unsure

Q23b. I would be more likely to consider smoke-free alternatives if the government provided information on how these products differ from cigarettes.

73% TOTAL AGREE
21% TOTAL DISAGREE
38% Strongly agree
35% Somewhat agree
12% Somewhat disagree
9% Strongly disagree
6% Unsure

Q23c. I would be more likely to consider smoke-free alternatives if they were more affordable than cigarettes.

75% TOTAL AGREE
20% TOTAL DISAGREE
44% Strongly agree
32% Somewhat agree
11% Somewhat disagree
9% Strongly disagree
4% Unsure

Q23d. I would be more likely to consider smoke-free alternatives if I had access to accurate information about them where these products are sold.

74% TOTAL AGREE
22% TOTAL DISAGREE
38% Strongly agree
35% Somewhat agree
11% Somewhat disagree
10% Strongly disagree
5% Unsure

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

D7. 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?

79% FREQUENT VOTERS
57% All of the time

22% Most of the time
10% Some of the time
5% Rarely
6% Never

D9.

Do you live in an urban, suburban, or rural area?

65% Urban
21% Suburban
14% Rural

D10. Which of the following best describes your current employment status?

45% Full-time employee
9% Part-time employee
1% Employer
12% Self-employed
10% Retired
5% Studying
10% Unemployed
1% Unable to work due to bad health/disability
5% Caring for home and family
1% Inactive due to other reasons
2% Prefer not to answer

THANK AND CLOSE SURVEY
