

Multi-Country Survey: February 2022

Q% Report

KEY SPECIFICATIONS

SAMPLE: N=44,622 global general population adults, ages 21+ (approximately n=1,000 nicotine consumers and n=1,000 non-consumers per market)

GEOGRAPHY: Argentina, Brazil, Bulgaria, Colombia, Costa Rica, Czech Republic, Dominican Republic, France, Germany, Greece, Italy, Japan, Malaysia, Mexico, Philippines, Portugal, Serbia, South Africa, South Korea, Spain, UK, US

METHOD: Online

MARGIN OF ERROR: ±0.5%

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, region, and nicotine product usage.

FIELDWORK DATES: 5-23 February 2022

LANGUAGE: Native

RESEARCH SUPPLIER: Povaddo

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

S1. What is your age?

12%	21-24
9%	25-29
9%	30-34
10%	35-39
10%	40-44
10%	45-49
8%	50-54
12%	55-59
8%	60-64
7%	65-69
3%	70-74
3%	75 or older

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%

We want to ask you about how you feel about your country of residence and the society you live in.

Q1. Generally speaking, do you think the overall situation in your country is getting better or worse? *And, do you feel strongly about that?*

36% TOTAL GETTING BETTER
56% TOTAL GETTING WORSE
 6% Getting better – strongly
 30% Getting better – somewhat
 32% Getting worse – somewhat
 25% Getting worse – strongly
 8% Unsure

Q2. When it comes to the influence that people have on society, is their influence the strongest as a...

(RANDOMIZE)
 25% Voter
 23% Consumer
 21% Business owner/Senior executive
 14% Employee/Worker
 16% Unsure

Q3. Do you think that you personally have the power or influence to make your country a better place?

43% TOTAL YES
45% TOTAL NO
 12% Yes – definitely
 31% Yes
 30% No
 15% No – definitely not
 12% Unsure

Q4. Generally speaking, do you think you're playing your part to make your country a better place?

70% TOTAL YES
19% TOTAL NO
17% Yes – definitely
53% Yes
14% No
5% No – definitely not
11% Unsure

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

I expect companies to listen to people and pursue strategies that aim to make this country a better place.

85% TOTAL AGREE
11% TOTAL DISAGREE
49% Strongly agree
36% Somewhat agree
8% Somewhat disagree
3% Strongly disagree
5% Unsure

Q6. Generally speaking, do you think the companies are doing their part to make this country a better place?

43% TOTAL YES
43% TOTAL NO
8% Yes – definitely
35% Yes
33% No
10% No – definitely not
15% Unsure

Q7. Do you think that if people and companies work together they have the ability to have a meaningful impact on the biggest issues facing society today?

85% TOTAL YES
8% TOTAL NO
37% Yes – definitely
49% Yes
6% No
2% No – definitely not
7% Unsure

Q9. Do you feel that your personal opinions are reflected in the way your government is addressing the big issues facing this country today?

31% TOTAL YES
58% TOTAL NO
7% Yes – definitely
24% Yes
38% No
20% No – definitely not
12% Unsure

Q10. Please indicate whether you agree or disagree with the following statement:

The debate around the big issues facing the country has gotten too polarized – both sides of any issue only focus on advancing the most extreme proposals.

71% TOTAL AGREE
17% TOTAL DISAGREE
22% Strongly agree
49% Somewhat agree
14% Somewhat disagree
3% Strongly disagree
12% Unsure

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

There will always be different points of view on how to tackle the big issues facing the country. To make real progress on those issues, the best solutions are achieved when a middle ground can be found between extremes on either side of the debate.

82% TOTAL AGREE
11% TOTAL DISAGREE
35% Strongly agree
46% Somewhat agree
9% Somewhat disagree
2% Strongly disagree
7% Unsure

Q12. Do you believe conversations about science and the latest scientific developments over the last few years have become more or less polarized?

54% TOTAL MORE POLARIZED
22% TOTAL LESS POLARIZED
16% Much more polarized
38% Somewhat more polarized
16% Somewhat less polarized
5% Much less polarized
10% About the same
15% Unsure

Q13. Generally speaking, do you think trust in science has increased or decreased since the start of the COVID pandemic? *And, do you feel strongly about that?*

55% TOTAL INCREASED
35% TOTAL DECREASED
16% Increased – strongly
39% Increased – somewhat
24% Decreased – somewhat
11% Decreased – strongly
10% Unsure

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

Q14. To solve the biggest problems facing society today, leaders need to listen to all those who are affected – even those with whom there are strong disagreements.

90% TOTAL AGREE
6% TOTAL DISAGREE
58% Strongly agree
31% Somewhat agree
5% Somewhat disagree
1% Strongly disagree
5% Unsure

Q15. Society should welcome the input of companies to address the major issues of this decade.

77% TOTAL AGREE
13% TOTAL DISAGREE
29% Strongly agree
48% Somewhat agree
10% Somewhat disagree
3% Strongly disagree
10% Unsure

Q16. Decisions that impact society and public health should be made on the basis of science and facts.

85% TOTAL AGREE
9% TOTAL DISAGREE
50% Strongly agree
35% Somewhat agree
7% Somewhat disagree
2% Strongly disagree
6% Unsure

Q17. Leaders should include a range of solutions in their approach to addressing the major issues facing society today. Including a range of solutions will ensure the best possible outcome for the greatest number of people.

87% TOTAL AGREE
6% TOTAL DISAGREE
45% Strongly agree
42% Somewhat agree
5% Somewhat disagree
1% Strongly disagree
7% Unsure

Q18. I am more likely to vote for leaders who listen to all sides of an issue and adopt sensible approaches which better the lives of everyday people.

88% TOTAL AGREE
6% TOTAL DISAGREE
57% Strongly agree
31% Somewhat agree
5% Somewhat disagree
2% Strongly disagree
6% Unsure

Q19. When making a decision which affects the livelihood of a significant proportion of the population, leaders must listen to and advocate for the people they represent.

88% TOTAL AGREE
7% TOTAL DISAGREE
57% Strongly agree
31% Somewhat agree
5% Somewhat disagree
2% Strongly disagree
5% Unsure

Q20. Individual voices can have a significant impact in influencing leaders and affecting policy change.

62% TOTAL AGREE
29% TOTAL DISAGREE
23% Strongly agree
39% Somewhat agree
21% Somewhat disagree
9% Strongly disagree
9% Unsure

Q21. Leaders need to adopt laws and regulation based on facts and data to keep up with the pace of technological change and innovation.

87% TOTAL AGREE
6% TOTAL DISAGREE
49% Strongly agree
38% Somewhat agree
5% Somewhat disagree
1% Strongly disagree
6% Unsure

Q22. On any topic, leaders should empower citizens with the right tools, information and choices so they can make the best decision for themselves and society as a whole.

89% TOTAL AGREE
6% TOTAL DISAGREE
54% Strongly agree
35% Somewhat agree
5% Somewhat disagree
1% Strongly disagree
5% Unsure

Q23. It would be better if leaders pursue policy changes which could make incremental progress on societal issues that are easy to put into action, rather than pursue policy changes that could make big progress but are harder to implement.

76% TOTAL AGREE
13% TOTAL DISAGREE
33% Strongly agree
43% Somewhat agree
10% Somewhat disagree
3% Strongly disagree
10% Unsure

Q24. Progress on the big challenges facing society will only happen if citizens speak up on the issues that affect them and take action to ensure policy makers are aware of what matters to them.

84% TOTAL AGREE
9% TOTAL DISAGREE
44% Strongly agree
40% Somewhat agree
7% Somewhat disagree
2% Strongly disagree
7% Unsure

Q25. Which, if any, of the following actions have you taken to ensure you make your opinion felt on the issues that matter to you? Please select all that apply.

(RANDOMIZE)

46% Liked or shared content on social media posted by others
36% Shopped/purchased from brands or companies that I know share my values
33% Posted on social media
31% Refused to shop/purchase from brands or companies that do not share my values
22% Joined campaign/interest groups that reflect my values
14% Actively campaigned about issues I care about (organized, attended meetings, rallies etc.)
12% Contacted politicians/government officials to let them know what I think about the issue(s)
2% Other
21% None of the above

Switching topics and thinking about public health issues...

Q26. Please indicate whether you agree or disagree with the following statement:

Expecting total abstinence from harmful behaviors by society (e.g. consumption of unhealthy food and alcohol, smoking cigarettes, etc.) is not feasible, so my government should take steps to reduce the harm of these behaviors in order to impactfully improve public health.

75% TOTAL AGREE
16% TOTAL DISAGREE
35% Strongly agree
40% Somewhat agree
11% Somewhat disagree
5% Strongly disagree
9% Unsure

Thinking specifically about reducing smoking rates...

Q32. Which of the following statements do you agree with most, even if you don't agree with either fully?

(ROTATE)

- 53% (Other/Some) people say that more regulation and taxation on cigarettes is NOT ENOUGH to make this country smoke-free
 - 24% (Some/Other) people say that ALL that is needed is more regulation and taxation on cigarettes in order to make this country smoke-free
 - 23% Unsure
-

Q33. 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.

- 67% TOTAL AGREE**
 - 20% TOTAL DISAGREE**
 - 25% Strongly agree
 - 42% Somewhat agree
 - 13% Somewhat disagree
 - 7% Strongly disagree
 - 13% Unsure
-

Q34. 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 substantiated to be a better choice than continued smoking.

- 79% TOTAL AGREE**
 - 12% TOTAL DISAGREE**
 - 42% Strongly agree
 - 38% Somewhat agree
 - 8% Somewhat disagree
 - 4% Strongly disagree
 - 9% Unsure
-

Q35. Do you believe the government needs to consider the role alternative products can play in making this country smoke-free?

- 72% TOTAL YES**
- 16% TOTAL NO**
- 29% Yes – definitely
- 43% Yes
- 11% No
- 5% No – definitely not
- 12% Unsure

Now, just a few final questions...

D1-4. Please indicate whether you are a regular user, occasional user, former user, or have never used each of the following.

<i>(RANDOMIZE)</i>	Regular User	Occasional User	Former User	Never Used	TOTAL USER	TOTAL NON-USER
Cigarettes	17%	6%	28%	50%	23%	77%
E-cigarettes or electronic cigarettes	5%	6%	11%	78%	11%	89%
Heated tobacco products	4%	5%	9%	82%	9%	91%
Oral tobacco or nicotine products	5%	4%	14%	77%	9%	91%

D5. Since the start of the COVID-19 pandemic, has your personal situation improved, gotten worse, or stayed about the same?

- 11% Improved
- 39% Gotten worse
- 46% Stayed about the same
- 4% Unsure

D6. And thinking about 2022, do you believe your personal situation will improve, get worse, or stay about the same?

- 36% Improve
- 19% Get worse
- 36% Stay about the same
- 9% Unsure

Q36. 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
37%	TOTAL DISAGREE
16%	Strongly agree
38%	Somewhat agree
23%	Somewhat disagree
15%	Strongly disagree
9%	Unsure

[ASK TO REGULAR OR OCCASIONAL USERS OF ANY NICOTINE CONTAINING PRODUCT]

Q37. Which of the following describes how you feel in [COUNTRY] as someone who uses tobacco and/or nicotine containing products? Please select all that apply.

(RANDOMIZE)

23%	TOTAL POSITIVE
41%	TOTAL NEGATIVE
27%	Discriminated against
21%	Marginalized
13%	Listened to
13%	Supported
2%	Other
12%	Unsure
26%	None of these

[ASK TO REGULAR OR OCCASIONAL USERS OF ANY NICOTINE CONTAINING PRODUCT]

Q38. Do you believe that policy makers need to better consider the views of tobacco and nicotine consumers when deciding on regulations for tobacco and nicotine containing products?

74%	TOTAL YES
15%	TOTAL NO
29%	Yes – definitely
45%	Yes
12%	No
3%	No – definitely not
11%	Unsure

[ASK TO REGULAR OR OCCASIONAL USERS OF ANY NICOTINE CONTAINING PRODUCT]

Q39. Please indicate whether you agree or disagree with the following statement:

For too long the voice of nicotine consumers has been excluded; a new approach to regulation is needed to ensure it better balances the voices of nicotine consumers and non-consumers.

77% TOTAL AGREE
13% TOTAL DISAGREE
32% Strongly agree
45% Somewhat agree
10% Somewhat disagree
3% Strongly disagree
10% Unsure

[ASK TO REGULAR OR OCCASIONAL CIGARETTE SMOKERS WHO ARE NOT USING E-CIGARETTES OR HEATED TOBACCO PRODUCTS]

Q40. 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.

62% TOTAL AGREE
26% TOTAL DISAGREE
26% Strongly agree
36% Somewhat agree
13% Somewhat disagree
13% Strongly disagree
12% Unsure

D10. 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?

56% All of the time
21% Most of the time
11% Some of the time
5% Rarely
7% Never

[DO NOT ASK D11 IN UK]

D11. Are you a member of a trade union?

10% Yes
90% No

D12. Do you live in an urban, suburban, or rural area?

63%	Urban
22%	Suburban
16%	Rural

D13. Regarding your primary residence, are you...

56%	The owner
29%	A renter
15%	House free of charge, for example by relatives, friends, or your employer

THANK AND CLOSE SURVEY
