

UNSMOKE

CLEARING THE WAY FOR CHANGE

"If you don't smoke, don't start. If you do, the best option is to quit—but those who don't quit should change. Quitting, or changing to a better alternative, impacts personal relationships and social lives in a positive way."

—Jacek Olczak, COO, Philip Morris International

WHITE PAPER

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PHILIP MORRIS INTERNATIONAL





Unsmoke: Clearing the Way for Change

Contents

Introduction

Unsmoking Our World 7

Section 1:

Unsmoke—Topline Findings 13

Section 2:

Unsmoke—Why Now? 19

Section 3:

Negative Aspects of Smoking 25

Section 4:

Alternatives to Continued Smoking 51

Section 5:

Desire for Support to Unsmoke 77

Section 6:

What Should Be Done to Make Cigarettes a Thing
of the Past 87

Section 7:

What's the Deal with *Unsmoke*? 99

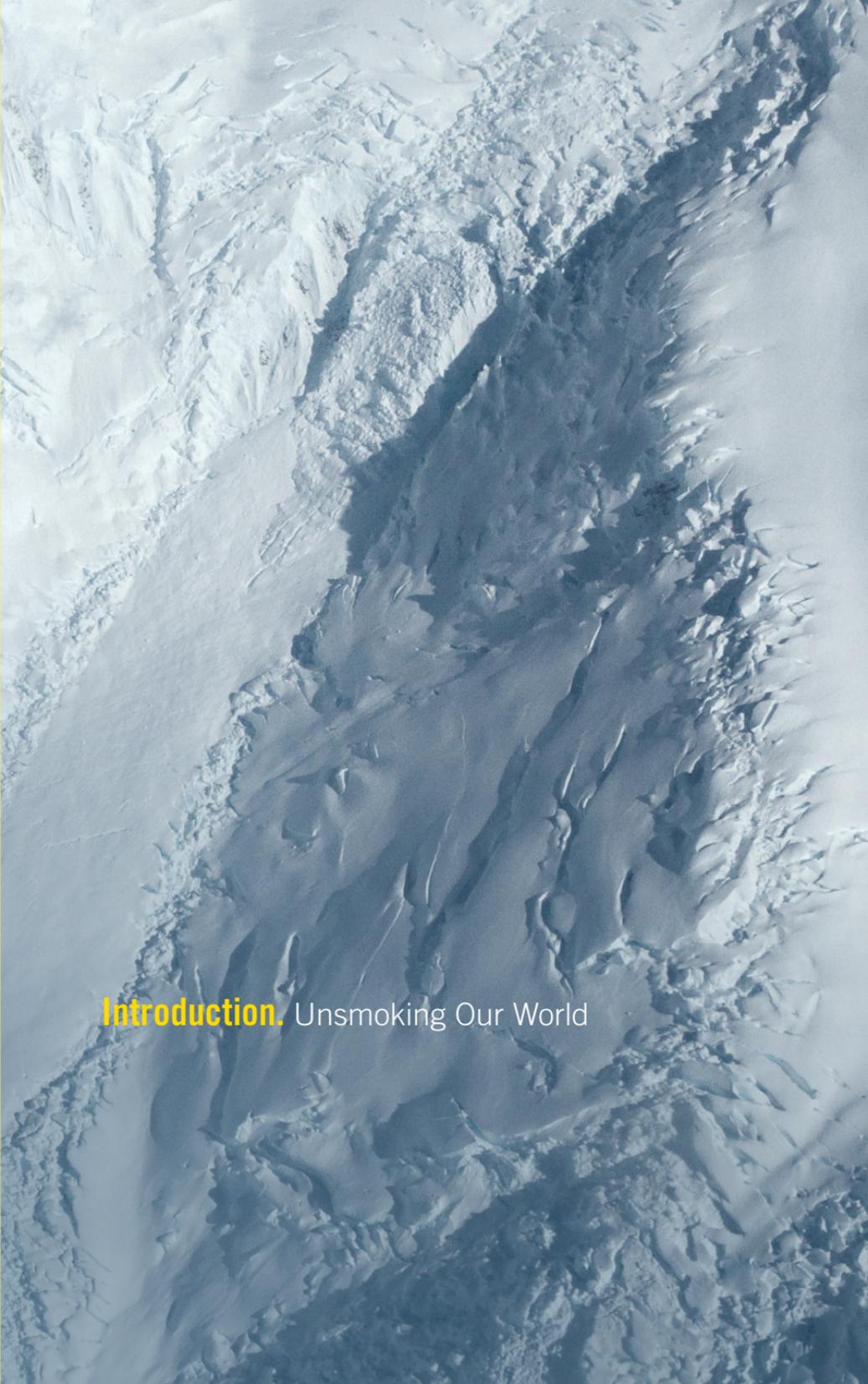
Section 8:

Attitudes Toward Change and Innovation 105

Appendices 111

Appendix 1: Country-Specific Survey Findings

Appendix 2: Availability of E-Cigarettes
and Heat-Not-Burn by Country

An aerial photograph of a rugged, mountainous landscape. The terrain is characterized by steep, rocky slopes and a central valley. A winding road or path is visible, cutting through the valley. The overall color palette is dominated by shades of blue and grey, suggesting a high-altitude or possibly snow-covered environment. The lighting creates strong shadows, emphasizing the topography.

Introduction. Unsmoking Our World



Unsmoke: It's more than a word. At Philip Morris International (PMI), it's our raison d'être, a movement we are working hard to drive globally and a cultural shift we are helping to engineer. At its core, unsmoke is about making things better for the estimated 1.1 billion adults who currently smoke—and, ultimately, for the world.



Unsmoke

1. To 'Unsmoke' means to [rid](#) smoke from your life. The act of unsmoking unites [smokers](#) and nonsmokers who want to Unsmoke themselves, family and friends. The best way to Unsmoke is to quit cigarettes and nicotine completely, but the next best way is to switch to better alternatives

If you don't smoke, don't start.

If you smoke, quit.

If you don't quit, change.

Unsmoke.

Danny has been a cigarette [smoker](#) for 15 years. He's Unsmoked his life by [switching](#) from [cigarettes](#) to a smoke-free alternative.

by [PhilipMorrisInternational](#) April 08, 2019

Our message is simple: Don't smoke. If you already don't smoke, don't start; if you do smoke, quit; and if you don't quit, change. Think of unsmoking as never starting, quitting altogether or—for those who don't—choosing better alternatives to continued smoking. We believe the world is already unsmoking, and we are just joining in.

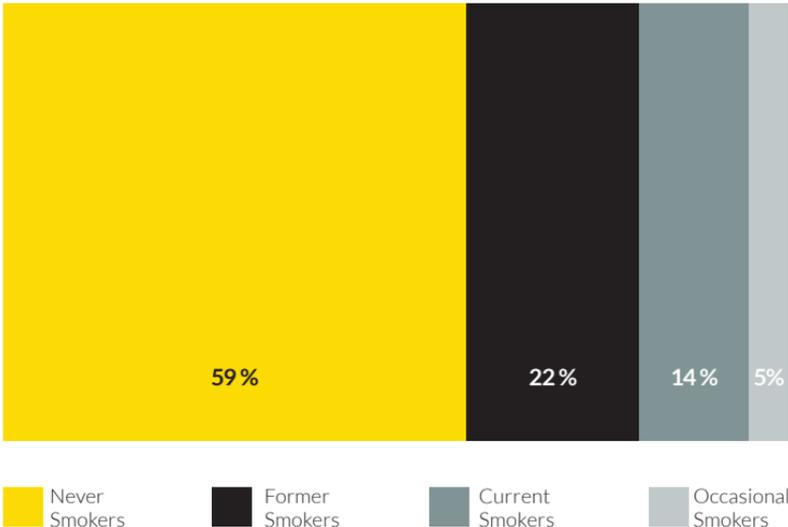
This white paper explores an international study of thousands of people and benchmarks our world as unsmoking starts to move slowly—and then less slowly—person to person, place to place, smoker to unsmoker. We invite you to join this movement.

Unsmoking Our World

About the study

In 2019, PMI teamed with independent research provider Povaddo on a global study that would help us better understand current mindsets toward smoking, the barriers that are preventing some smokers from stopping and the extent to which people are aware of smoke-free alternatives to cigarettes. In April and May of 2019, Povaddo fielded an online survey among 16,099 men and women, aged 21–74, in 13 countries/regions: Argentina, Australia, Brazil, Denmark, Germany, Hong Kong, Israel, Italy, Japan, Mexico, Russia, the United Kingdom and the United States. The survey was conducted in respondents’ native languages.

We asked respondents to self-report their smoking status, which breaks down as follows:





A booster sample was used to secure in each market 350 adult smokers and 100 former adult smokers who had switched to a smoke-free alternative product (“switchers”).

An additional 8 percent are “smoking partners”—former smokers or never smokers who have a partner who smokes. The margin of error for the entire survey is +/- 1 percent.

Terminology

E-cigarettes, also called electronic cigarettes or vapes, are a category of smoke-free products without tobacco. These battery-powered devices vaporize a liquid solution that contains nicotine and/or flavors, also known as an e-liquid.

Heat-not-burn products, also known as heated tobacco products, only heat tobacco. The heating process generates a nicotine-containing vapor.

Smoke-free alternatives to continued smoking like e-cigarettes and heated tobacco products are not risk-free and contain nicotine, which is addictive.

Unsmoking Our World





Section 1. Unsmoke

Topline Findings



Partners of smokers are the ones who care most about unsmoking

The patterns of response in the survey show that of all the subgroups, smokers' nonsmoking partners are more than averagely tuned in to unsmoking. They show above-average support for government efforts to reduce smoking rates, a new conversation around unsmoking, a better conversation with smokers and access to better information related to alternatives. They also show above-average support for tobacco companies working on smoke-free alternatives and are more apt to have a positive attitude toward "unsmoking."

Nonsmokers who aren't partnered with smokers don't have to think about smoking or live with cigarette smoke if they don't want to. To the extent that it bothers them, they can simply minimize contact with those who smoke. For them, smoking is somebody else's problem. By contrast, nonsmoker partners of smokers live with the smoke and smells. Short of leaving their partner (as 17 percent have considered), they simply have to put up with the smell for as long as their partner chooses to keep smoking. While their smoker partners enjoy the ritual, nonsmoker partners do not. They personally have a lot to gain from their partner unsmoking.

Occasional smokers are a key unsmoke constituency

As noted, the survey questionnaire asked respondents whether they regard themselves as current smokers, occasional smokers, former smokers or never smokers. The occasional smokers subgroup comprised around 5 percent of the total sample.

Topline Findings

No definition of these categories was given to respondents, so their self-categorization was up to them. This means we don't know how those who self-characterize as occasional smokers define "occasional." What's important from the unsmoking perspective is that this group's attitude toward smoking is different. While 18 percent of current smokers said they have hidden their smoking from loved ones, almost twice the percentage of occasional smokers (34 percent) have done so. Just over one-third of current smokers feel discriminated against, but that rises to almost half of occasional smokers. Occasional smokers are more likely than current smokers to expect encouragement to stop smoking from all sources, including doctors, family and friends.

What do "never smokers" have to contribute?

The first part of PMI's call to unsmoke is "If you don't smoke, don't start." The aim of anti-smoking initiatives on all sides is that growing numbers of people across the globe will never smoke cigarettes and, beyond that, will never become users of nicotine.

In the survey, never smokers constituted 59 percent of the sample. It's the subgroup with the least experience of smoking. Not only have they never smoked, only 9 percent of them have a smoker partner. Consequently, they are likely to be the group with the least insight into the challenges of quitting cigarettes altogether or switching to a smoke-free alternative.

Nevertheless, never smokers showed slightly above average support for government efforts to reduce smoking rates and for a better conversation with smokers and were also slightly more



apt to show a positive attitude toward “unsmoking.” They were marginally less likely to favor access to better information and to support tobacco companies working on smoke-free alternatives.

Overall, it might seem that never smokers have little personal incentive or motivation to see significant effort going into stop-smoking efforts. As regards never smokers, however, the key finding from the survey is that they do not oppose such initiatives and, indeed, support them, with 83 percent favoring government efforts to reduce smoking rates.

Age is a factor in attitudes

Older respondents in the survey may have lived through radical shifts in social attitudes toward smoking, depending on where they live. In their youth, smoking might have been a social norm and smokers may have been no less accepted than nonsmokers in social groups. Now, smoking is not the norm in many regions (though it may remain so in other places), and smokers in those locales are more likely to be moved—literally and figuratively—to the edge of social groups¹. Some younger respondents, particularly the 21–34 cohort, may never have known a time when smoking cigarettes was commonplace.

The survey indicates that dislike of smoking and support for unsmoking is stronger among younger people. More than two-fifths of smokers within the 21–34 age cohort (41 percent) reported having fallen out with their partner over smoking, compared with 33 percent of smokers within the 35–54 and 55–74 cohorts. The tendency to hide smoking from loved ones also is higher among smokers aged 21–34 (32 percent),

1 <https://www.npr.org/templates/story/story.php?storyId=90681873>

Topline Findings

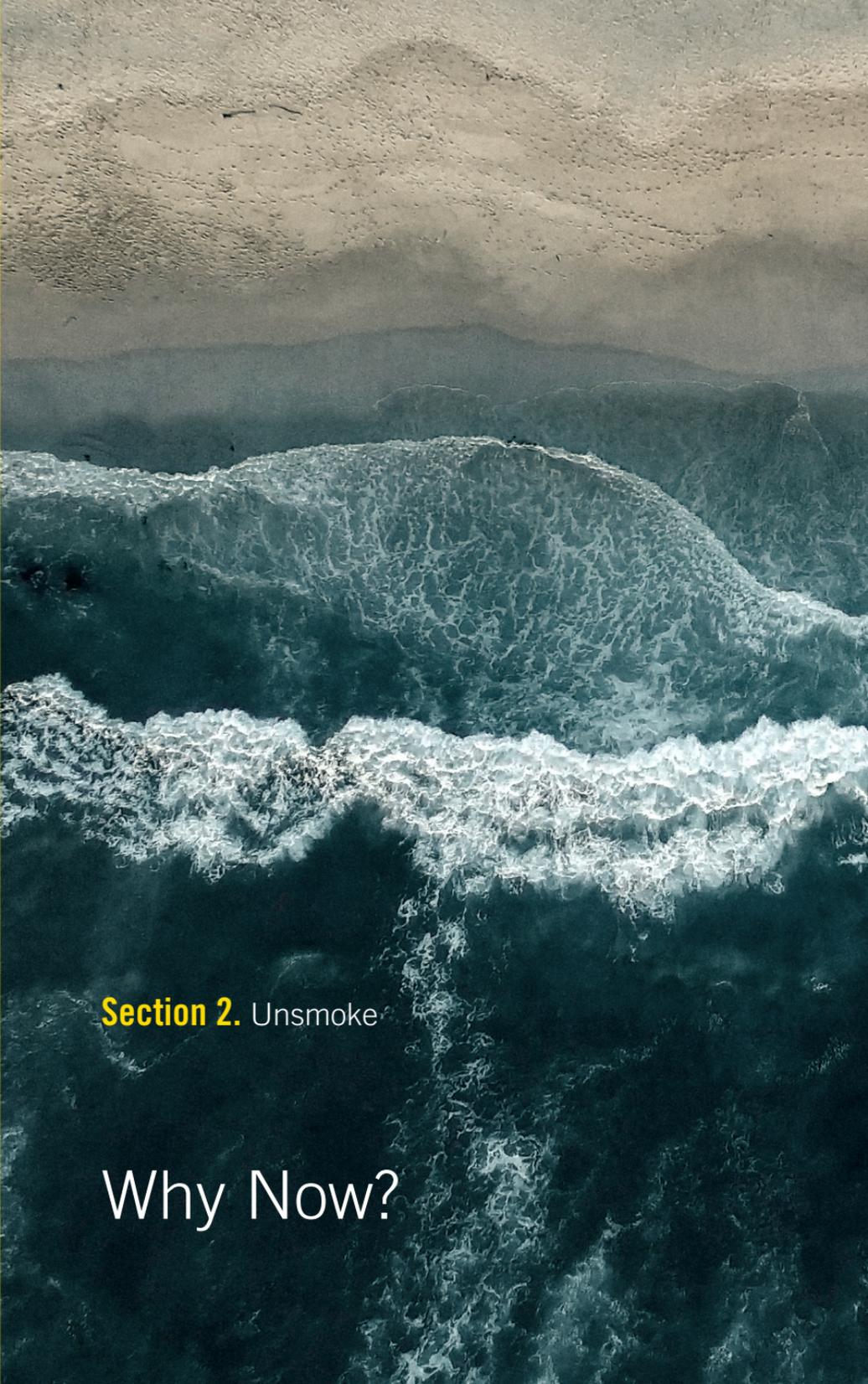
decreasing to 21 percent within the 35–54 cohort and just 13 percent in the 55–74 cohort.

Accordingly, a positive attitude toward “unsmoking” is more prevalent among younger than older respondents, with support ranging from 61 percent of 21–34s through to 59 percent of 35–54s and 54 percent of 55–74s.

Demand for information and conversation around smoke-free is high

The survey shows overwhelming, across-the-board support for a new conversation to reduce smoking rates (83 percent) and for a better conversation with smokers (80 percent). This raises the questions: How might these conversations be started? How can they be better? On what should they focus?

One possible clue comes from the high 83 percent of positive responses to the thought that smokers who would otherwise continue smoking cigarettes should have access to and accurate information about smoke-free alternatives. The response was particularly positive among users of e-cigarettes, at 93 percent. Among partners of smokers, the people most likely to have conversations with those who smoke, an above-average 88 percent supported the prospect of access to accurate information.

An aerial photograph of a coastline. The top portion of the image shows a wide, sandy beach with a textured surface. Below the beach, the ocean waves are breaking, creating a white, frothy surf that contrasts with the dark blue-green water. The waves are rolling in from the right side of the frame.

Section 2. Unsmoke

Why Now?



Over the past two decades, Philip Morris International has invested more than US\$6 billion in efforts to create a smoke-free future, or to unsmoke our world—even if that particular term wasn't yet in use. In 2016, the company formally announced it was focusing its business on smoke-free products to replace cigarettes, as soon as possible. Our destination is a smoke-free future² for all—that is, for those who don't smoke as well as for the more than 1 billion current smokers around the globe and those who care about them. In an ideal world, we would instantly be transported to our destination. We don't live in an ideal world, however, and progress toward a smoke-free future will not be instantaneous. Everybody knows that cigarettes are harmful and addictive, and yet people continue to smoke; cigarettes are still permitted by governments and regulators; they are still manufactured by tobacco companies including Philip Morris International (PMI); they are still legally sold.

This is where we are now.

For years there have been myriad initiatives all over the world to discourage people from smoking—everything from increased taxes and restrictions on advertising, packaging and display to outright bans on smoking in public places. Many of these initiatives have been effective in reducing smoking rates. There has been a constant decline in smoking prevalence over several decades³. In terms of absolute numbers, however, the World Health Organization estimates that there are still 1.1 billion smokers and that approximately the same number of people will smoke in 2025, meaning that it's likely there will be as many people smoking in six years as there are currently. This is why

2 <https://www.pmi.com/who-we-are/designing-a-smoke-free-future>

3 https://www.swissinfo.ch/eng/world-no-tobacco-day_a-graphic-look-at-global-smoking-trends/44152766

Why Now?

earlier this year, in order to move things along faster toward our smoke-free destination, PMI launched the “Year of Unsmoke.”⁴ Our clear and urgent call to action is articulated in three simple rules that are reflective of the company’s position—and mission:

IF YOU DON’T SMOKE, DON’T START.

IF YOU SMOKE, QUIT.

IF YOU DON’T QUIT, CHANGE.

To unsmoke means to eliminate smoke from your life—and the lives of those around you. For smokers, the best way to unsmoke is to quit cigarettes and nicotine completely. Those who don’t quit should have the opportunity to at least choose a better alternative to continued smoking. PMI has put more than 400 world-class scientists, engineers and technicians to work on researching effective alternatives for adult smokers who would otherwise continue smoking—alternatives that do not attract nonsmokers, that are significantly less harmful than combustible cigarettes and that are satisfying enough to encourage these smokers to switch to them completely. But, as we have stated before, “You not only need the right products, you need people to use them.”⁵

4 <https://www.pmi.com/unsmokeyourworld/the-year-of-unsmoke>

5 <https://sustainablebrands.com/read/behavior-change/philip-morris-international-is-quitting-smoking-but-don-t-take-their-word-for-it>

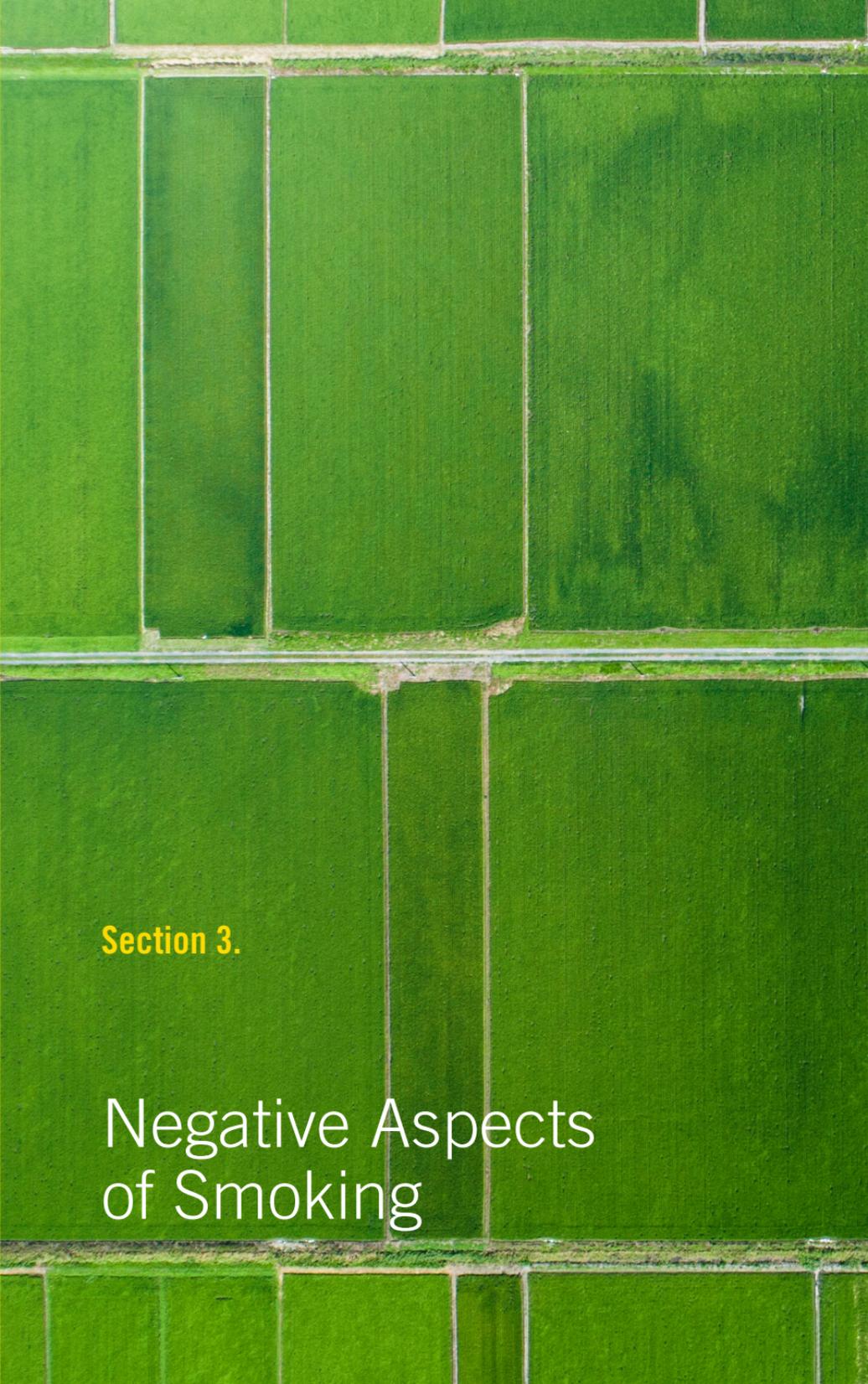


Mapping the route to a smoke-free future

Unsmoking is a clear idea, and it's simple to say, but we all know it's not easy to do for some people. This can be for a variety of reasons—motivation and incentive being two significant factors. It's apparent that knowledge of negative health effects alone is not enough to deter everyone from starting to smoke, nor to persuade all current smokers to stop and not start again.

It seems that smokers need more encouragement and incentives to stop smoking than they are receiving at present. With this in mind, we commissioned the Povaddo survey to shed light on how various entities can work together to address this important global health issue. Looking at these findings, we have gleaned insights into the current landscape and how we might progress faster toward our smoke-free future.



An aerial photograph of a vast green agricultural field, likely a rice paddy, divided into a grid of rectangular plots by narrow furrows. The color is a vibrant, uniform green. The text is overlaid on the lower-left portion of the image.

Section 3.

Negative Aspects
of Smoking



Smoking causes serious disease and is addictive. Decades of public health warnings and media coverage of the risks of smoking mean people are aware of the negative effects of smoking on health. And those who purchase their own cigarettes know the out-of-pocket financial cost is substantial. The impacts on physical and financial health are only the start of problems smokers face, however. Our survey results show that smoking also has a negative effect on the social spheres of life.

Smoking and personal relationships

Things have changed a lot since the days when smoking was virtually a social norm. Check out movies, TV shows and photos from a few decades ago, and you will see just how common and accepted smoking was back then. That is no longer the case. Now, in places both public and private, smoking is increasingly less tolerated—to the point at which it impacts interpersonal relationships. In fact, at a time when opinions in general are tending to polarize, smoking may be on the way to becoming a wedge issue.

Smoking and close personal relationships

The survey found that smoking is a source of conflict for couples made up of a smoker and a nonsmoker. It examined the prevalence of disagreement from both perspectives.

Overall, more than one-third (36 percent) of current and occasional smokers agreed: “My smoking causes arguments with loved ones.” This figure suggests that more than one in every three smokers is likely to get into arguments with loved ones about smoking.



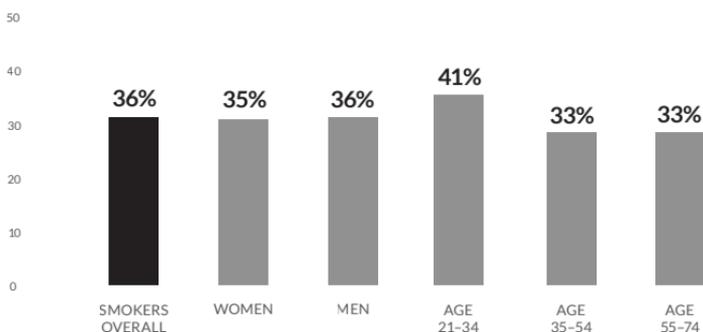


Smoker partner perspective—by subgroup

Younger smokers are the most likely to have experienced smoking-related arguments with loved ones. More than two-fifths of smokers in the 21–34 age cohort (41 percent) reported falling out with their partners over smoking, compared with a significantly lower 33 percent of smokers in both the 35–54 and 55–74 cohorts.

My smoking causes arguments with loved ones—by subgroup

Base: Smokers



The reasons for this difference across the age groups are a matter of conjecture. One may be that as smoking rates have decreased, younger people have become less tolerant of smoking than their elders. They have grown up in environments where the absence of cigarette smoke is the norm.

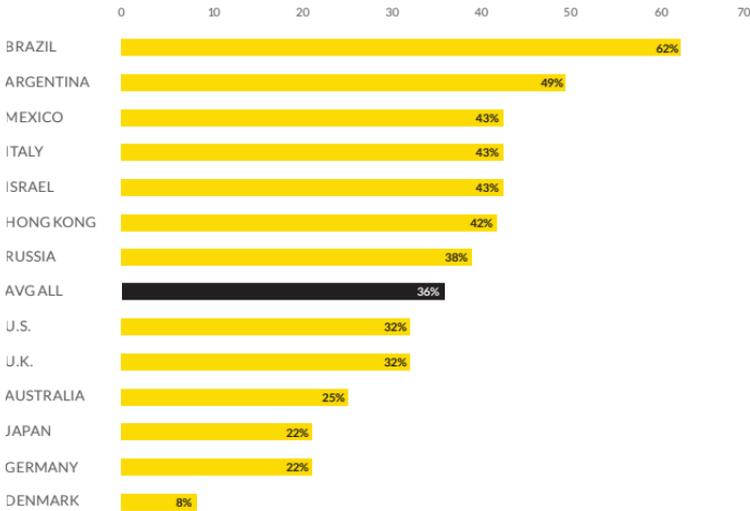
Negative Aspects of Smoking

Smoker partner perspective—by country/region

The figures diverged widely across locations. In Brazil, 62 percent of smokers reported that their smoking leads to arguments with loved ones; this compares with just 8 percent of smokers in Denmark who said the same. Within this wide range, country/region groupings emerged.

My smoking causes arguments with loved ones—by country/region

Base: Smokers



The highest percentages reporting arguments were from Latin American countries—Brazil (62 percent), Argentina (49 percent) and Mexico (43 percent)—along with Italy and Israel (both 43 percent) and Hong Kong (42 percent).

The lowest percentages of smoking-prompted arguments were found in Germany and Japan (both 22 percent) and Denmark (8 percent).

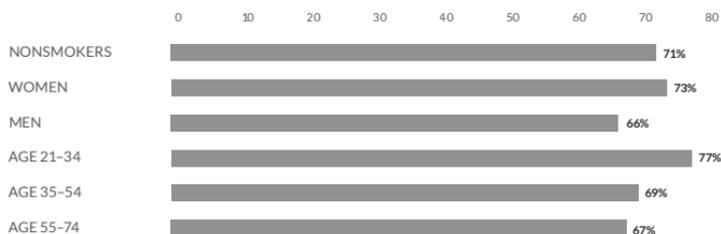


Nonsmoker partner perspective—by subgroup

The survey asked nonsmokers with smoking partners whether they ever had disagreements with their partner connected to their smoking. The results were starkly different from the view expressed by the smokers in the sample. Indeed, a strong majority (71 percent) of nonsmoking partners reported arguments over smoking. This is almost double the 36 percent of smokers who reported such arguments.

Have you ever had a disagreement or argument with your partner or spouse because he/she smokes cigarettes? (YES)

Base: Nonsmokers with smoker partner



Nonsmoker women (73 percent) were even more apt than nonsmoker men (66 percent) to report arguments with their smoker partners.

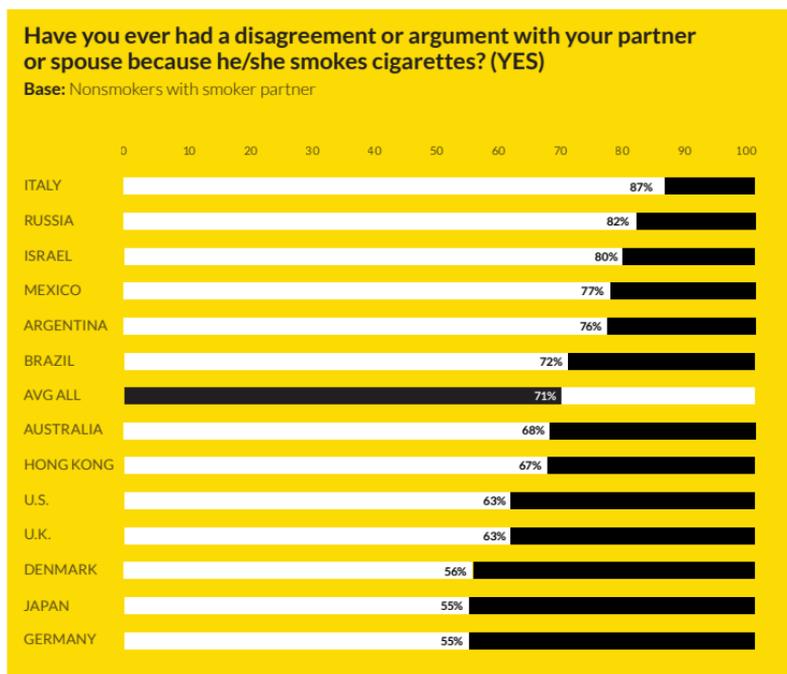
As was the case on the smoker side of the partner arguments (see previous chart), the younger cohort was the most affected, with 77 percent of 21-34s reporting arguments, compared with 69 percent of 35-54s and 67 percent of 55-74s.





Nonsmoker partner perspective—by country/region

Looking at this question across country/region, agreement rates ranged from 87 percent of those surveyed in Italy to just 55 percent of those in Germany and Japan.



The highest percentages of nonsmokers reporting arguments were in many of the same places in which smokers were also most apt to report arguments:

- Italy (87 percent) and Israel (80 percent) took the lead, with Latin American countries not far behind: Mexico (77 percent), Argentina (76 percent) and Brazil (72 percent).

Negative Aspects of Smoking

The English-speaking countries reported similar levels of partner disagreements about smoking:

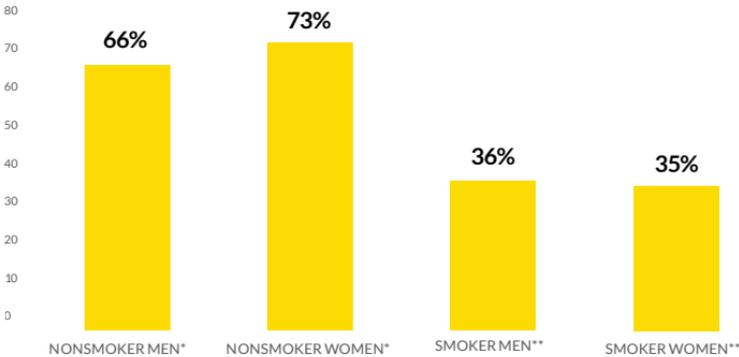
- Australia at 68 percent, and the U.K. and U.S. at 63 percent.

In keeping with the smoker partner perspective, the lowest percentages of smoking-prompted arguments were reported in Germany and Japan (55 percent).

Partner smoking arguments—by gender

Two-thirds of nonsmoker men and nearly three-quarters of nonsmoker women reported having arguments with their partners about smoking. In sharp contrast, only 36 percent of male smokers and 35 percent of female smokers admitted to such arguments. This raises the question: Why is it that in couples where one smokes and the other doesn't, smoking is cited as a source of conflict by almost twice as many nonsmokers as smokers?⁶

Partner smoking has caused arguments with a loved one—men vs. women



* When asked the question: Have you ever had a disagreement or argument with your partner or spouse because he/she smokes cigarettes?

** When asked if they agree with the statement: My smoking causes arguments with loved ones.

6 With the caveat that the survey did not include both partners in smoker/nonsmoker couples



Hiding smoking from loved ones and friends

Perhaps a contributory factor to the difference in results from smokers and nonsmokers is that smokers underreport the arguments they have. Indeed, almost a quarter (23 percent) of smokers told us they hide their smoking from loved ones or friends. They may assume these people will somehow not notice the telltale signs, but it may also be that refraining from smoking in front of a loved one or friend makes a confrontation less likely.

The survey did not ask why smokers hide their smoking, so inferring possible reasons can only be conjecture. Reasons could include the desire to avoid the disapproval of others, as well as an element of denial (“If nobody else knows about it, it doesn’t really count”).

It’s telling that just 18 percent of self-described current smokers said they have hidden their smoking, while 34 percent of self-described occasional smokers have done so. Is it possible that self-describing as an occasional smoker involves some element of denial—“I’m not really a smoker”?

Across the subgroups and countries/regions, the highest percentages of clandestine smoking were reported by:

- The youngest cohort (age 21–34): 32 percent
- Women: 26 percent (vs. 21 percent of men)
- Brazil and Hong Kong: 37 percent
- U.K. and U.S.: 33 percent

Negative Aspects of Smoking

Smoking as a precipitator of breakups

The survey asked nonsmokers with a smoker partner whether they had ever considered leaving or breaking up with their partner or spouse because he/she smokes cigarettes. The vast majority (83 percent) said “no,” but that still leaves 17 percent who said “yes” (19 percent of women vs. 14 percent of men).

Taken on its own, this seems like a relatively modest risk in driving potential breakups (around 1:6). But it’s unlikely that smoking is the only source of conflict in otherwise harmonious relationships. It’s more likely that smoking is one of several behaviors that cause conflict (“And another thing, your smoking...”).

Places in which smoking appears most likely to contribute to a breakup:

- U.S.: 32 percent
- Brazil: 26 percent
- Hong Kong: 25 percent
- Argentina: 23 percent

In a similar vein, more than one-third (37 percent) of nonsmokers said they would break up with their current partner if he or she were to start smoking.



The levels were similar across most subgroups but noticeably higher in some countries/regions:

- Hong Kong: 56 percent
- U.S.: 45 percent
- Japan: 44 percent
- Israel: 43 percent
- Brazil: 42 percent

The role of odor in potential breakups

The odor of cigarettes was a significant factor for the 17 percent of nonsmokers with a smoker partner (n=233) who said they had considered leaving or breaking up with their partner or spouse because he/she smokes. Around three-quarters (77 percent) said it was because their partner smelled like cigarettes; 59 percent, because their home smelled like cigarettes; and 36 percent, because they themselves smelled like cigarettes (despite not smoking).

Smoking and social relationships

There was a time when there were smoking and nonsmoking sections on passenger aircraft. Smokers were permitted to light up in bars, restaurants, offices and other public places. Now, in many parts of the world, the vast majority of public spaces are “nonsmoking.” And so people have come to expect environments that are smoke-free. The nonsmoking majority no longer need be concerned about going out to a public place and coming home with their hair and clothes smelling of other people’s smoke.

Negative Aspects of Smoking

Avoiding smokers' homes—by subgroup

Many countries/regions have laws regulating smoking in public places. Private homes are another matter.

Our survey found that more than two-thirds of nonsmokers (69 percent) don't like visiting smokers' homes because they feel uncomfortable being around smoke.

Looking into the subgroups:

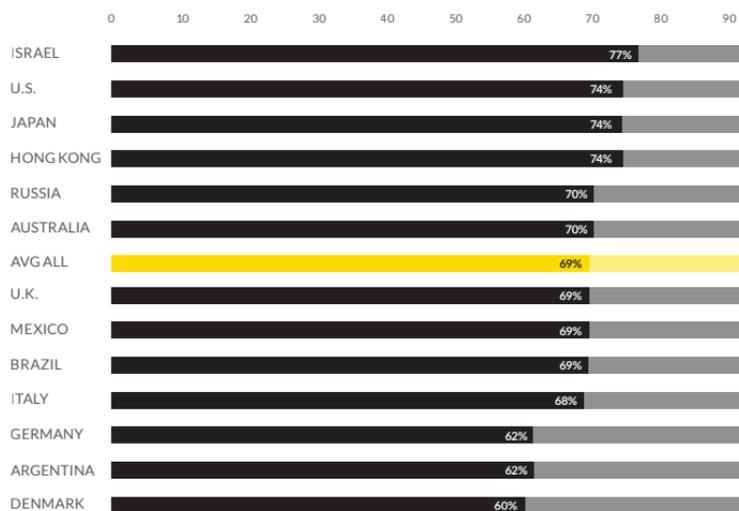
- More women than men feel uncomfortable in this situation (72 percent vs. 66 percent).
- It bothers former smokers less than never smokers (56 percent vs. 74 percent).
- There is virtually no difference between the three age cohorts in their level of dislike in visiting smokers' homes.



Avoiding smokers' homes—by country/region

I don't like visiting smokers' houses because I feel uncomfortable being around smoke

Base: Nonsmokers



While there was a 17-point difference between Denmark (60 percent) and Israel (77 percent), the underlying pattern is beyond doubt: Regardless of location, most people dislike visiting the homes of smokers.

In any country/region surveyed, results suggest that between three-fifths and three-quarters of nonsmokers feel uncomfortable visiting people who smoke in their homes—or may avoid visiting altogether.

Negative Aspects of Smoking

Social discomfort of smoking

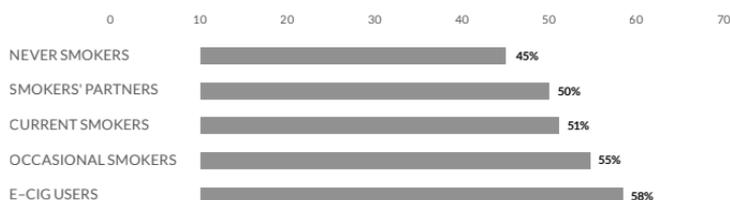
In many places around the world, smoking has transitioned from an accepted mainstream social activity to an increasingly rejected and marginalized habit. Social disapproval of smoking may be expressed through legislation and public education campaigns, as well as through occasional face-to-face comments. People tend to avoid public confrontation, so nonsmokers may be more likely to express their dislike of being around smoking with gestures rather than words: wrinkling their nose, waving smoke away with their hands or simply moving away from the smoker. In whatever way dislike of smoking is expressed, a majority of smokers have every reason to believe that their habit is not welcomed by others.

Overall, almost half of all respondents (47 percent) believe that even when not smoking, smokers can feel uncomfortable around friends and relatives who are not smokers. This number reflects both the direct experience of smokers themselves and the perceptions of nonsmokers. The expressed discomfort was most prevalent among self-identified occasional smokers (55 percent) and users of e-cigarettes (58 percent).



Even when not smoking, smokers can feel uncomfortable around friends and relatives who are not smokers

Base: Total sample



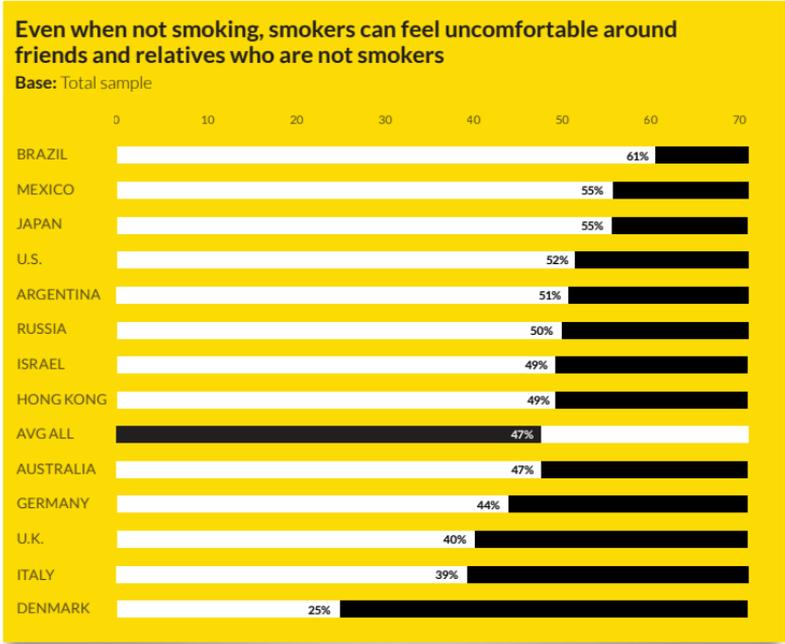
Clearly, people who have never smoked cannot have had the same experiences of discomfort as smokers. Nevertheless, many who had never smoked (45 percent) and even more partners of smokers (50 percent) felt able to state that smokers can feel uncomfortable around nonsmokers. This may be based on their discussions with smokers or their observations of smokers' expressions. It may also be an assumption based on how they believe they would feel were they smokers.

Smoker discomfort—by country/region

Looking across the countries/regions in the survey, the perception of smoker discomfort around nonsmokers was at similar levels in most places, but with outliers:

- Brazil: 61 percent, the highest level of agreement
- Mexico and Japan: both 55 percent, significantly above the average
- Denmark: 25 percent, the lowest level, just over half the average

Negative Aspects of Smoking



Prejudices against smokers—by subgroup

In the survey, more than half (54 percent) of nonsmokers agreed that people who smoke are on average perceived as less attractive than those who don't, with little difference between the subgroups.

- Men and women agreed in similar numbers (53 and 55 percent, respectively).
- The age cohorts were in relative accord: 21–34, 56 percent; 35–54, 55 percent; 55–74, 51 percent.



Looking at national responses to this statement, English-speaking countries are the most likely to think smokers are considered less attractive than nonsmokers:

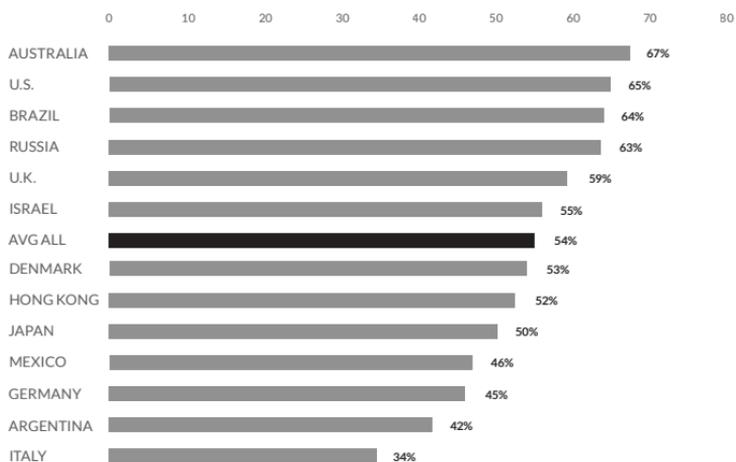
- Australia (67 percent), U.S. (65 percent) and U.K. (59 percent)

Of the Latin American countries, Brazil (64 percent) is significantly more apt than the others to believe smokers are considered less attractive. Mexico (46 percent) and Argentina (42 percent) are not as strongly inclined to think smokers are perceived as less attractive.

Italy (34 percent) is by far the least inclined to believe that smokers are regarded as less attractive than nonsmokers.

People who smoke are on average perceived as less attractive than people who don't smoke

Base: Nonsmokers



Negative Aspects of Smoking

Discrimination against smokers—by subgroup

Given the extent to which social environments can be uncomfortable for smokers, it's surprising that only 44 percent feel discriminated against, while 50 percent do not. Why might this be?

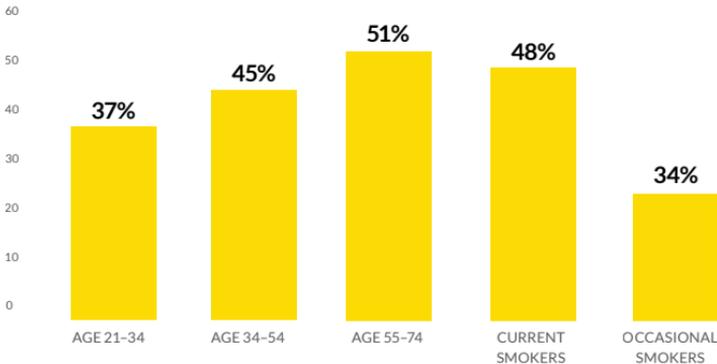
Drilling into the figures, the sense of being subject to discrimination gets stronger with age:

- Age 21–34: 37 percent
- Age 35–54: 45 percent
- Age 55–74: 51 percent

One possible interpretation is that younger adult smokers are more used to negative attitudes toward smoking and are more likely to accept the situation as an understandable norm rather than as discrimination. By contrast, older smokers will remember when smokers might ask, “You don’t mind if I smoke, do you?” and expect to get a response along the lines of “Not at all.” But there are other possible interpretations of this data.

As a smoker, do you feel discriminated against compared with others? (YES)

Base: Smokers

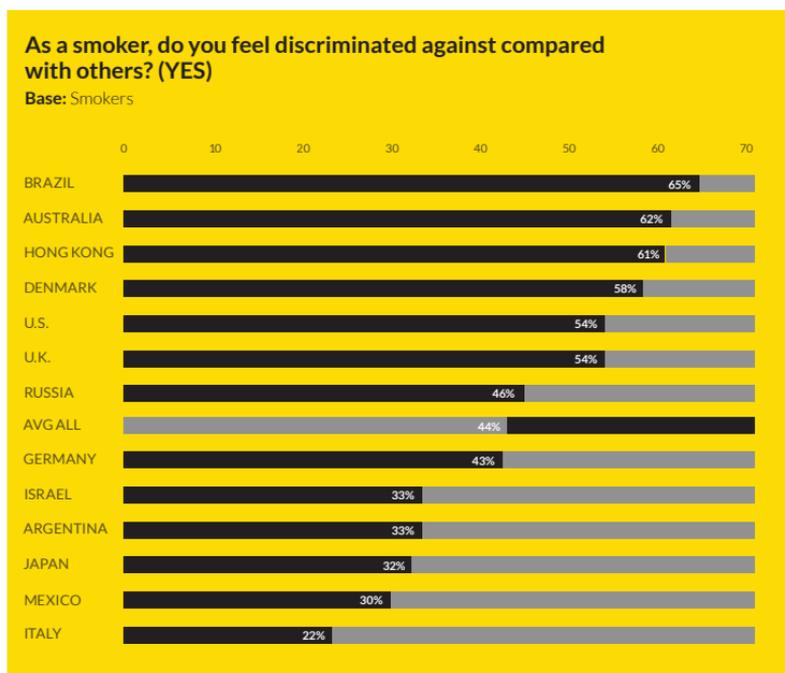




Discrimination against smokers—by country/region

Smokers' sense of being discriminated against varies widely across locations, from just 22 percent in Italy to almost three times that level in Brazil (65 percent).

To some extent, these differences might be taken as a reflection of each location attitude toward smoking and smokers. Do smokers feel more discriminated against in places with the strongest regulations or anti-smoking activism? Or is some other factor—perhaps cultural in nature—at play?



Negative Aspects of Smoking

Sensory negatives of smoking

Throughout history people have been keen to make themselves and their environments smell more attractive. And they've been willing to pay for the pleasure. The global market for personal fragrances and perfumes was estimated to be worth US\$52.7 billion in 2018 and is forecast to reach US\$72.3 billion by 2024.⁷ On top of this, the global home fragrances market was valued at US\$7.2 billion in 2018 and is projected to reach US\$9.4 billion by 2024.⁸ That's a lot of people deliberately spending a lot of money to make their personal environments smell good. How does this widespread desire for pleasant fragrances jibe with the inevitable effect of burning tobacco, which most people agree doesn't smell good?

General objections to the smell of smokers

Aside from the associated health risks and addiction, there are a number of negatives related to smoking cigarettes, including discarded butts, ash and yellow stains. In our survey, we explored the extent to which smell is a problem. Nonsmoking respondents made it clear that they are not keen on the scent of smoke, with 77 percent agreeing that the worst smell of a smoker is his or her clothes, while 57 percent said the worst smell of a smoker is his or her hair. (Apparently, some people couldn't decide between the two.)

The smell of smokers' clothes was a major dislike for majorities in every country/region and every subgroup:

7 <https://www.mordorintelligence.com/industry-reports/fragrance-and-perfume-market>

8 <https://www.prnewswire.com/news-releases/global-home-fragrances-market-stood-at--7-2-billion-in-2018-and-is-projected-to-grow-at-a-cagr-of-4-6-during-2019-2024--300815013.html>



- Smokers' partners: 74 percent
- All the age cohorts: 21–34 (74 percent), 35–54 (78 percent), 55–74 (79 percent)
- Both men (75 percent) and women (79 percent)

The smell of smokers' clothes—by country/region

Emphatic majorities in each region objected to the smell of smokers' clothes. The levels were high across the board, ranging across a relatively narrow 16-point band, from 83 percent in Argentina and Germany to 67 percent in Japan.

The worst smell of a smoker is their clothes

Base: Nonsmokers



Negative Aspects of Smoking

It is striking that Italy, where the fewest smokers reported feeling discriminated against (22 percent), returned one of the highest percentages (80 percent) objecting to the smell of smokers' clothes.

The smell of smokers' hair—by subgroup

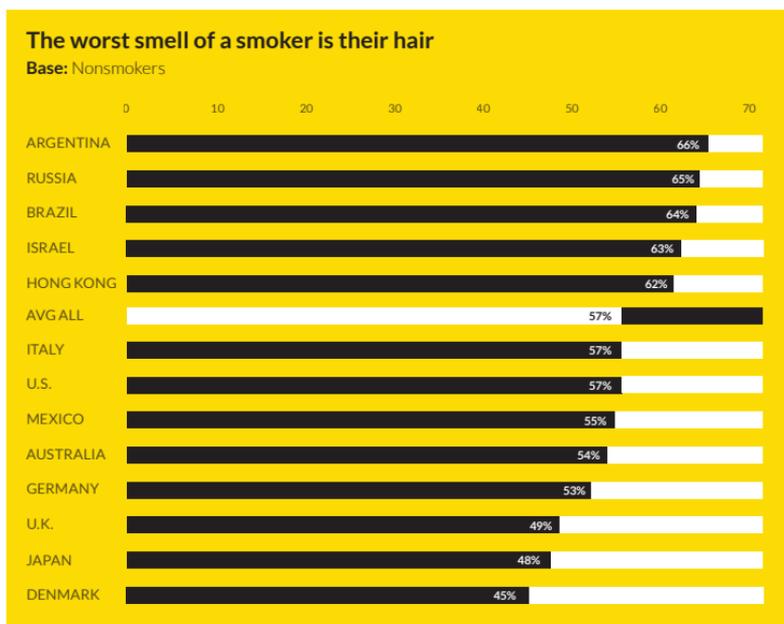
The global sample was less likely to express dislike for the smell of smokers' hair (57 percent) than their clothes (77 percent). Nevertheless, a majority of each subgroup dislikes the smell of smokers' hair:

- Smokers' partners: 54 percent
- All the age cohorts: 21–34 (52 percent), 35–54 (58 percent), 55–74 (59 percent)
- Both men (53 percent) and women (60 percent)

The smell of smokers' hair—by country/region

Across locations, the pattern of dislike of smokers' hair smell was similar but not identical to the dislike of the smell of smokers' clothing. The range of dislike was slightly wider, at 21 points, with the same places at the extremes of the range:

- Argentina returned the highest prevalence of dislike of smokers' hair smell: 66 percent.
- At the other end of the spectrum were Japan (48 percent) and Denmark (45 percent).



In all locations, respondents were significantly likelier to dislike the smell of smokers' clothes more than the smell of their hair. This could be because clothing is more apt to trap the scent of smoke or because getting close enough to smell a person's hair requires a higher level of physical intimacy. But there could be other reasons. The average clothes vs. hair gap across all areas was 20 percentage points, but in some places the scores were strikingly closer, suggesting that these respondents object to the smell of smoke regardless of its source.

- Russia: 11-point gap (76 percent clothes, 65 percent hair)
- Brazil: 11-point gap (75 percent clothes, 64 percent hair)
- Hong Kong: 13-point gap (75 percent clothes, 62 percent hair)

Negative Aspects of Smoking

In other places, the gap was strikingly wider, suggesting that these locations are far more sensitive to smokers' clothes smell than to their hair smell—or at least notice it more often:

- Germany: 30-point gap (83 percent clothes, 53 percent hair)
- Denmark: 32-point gap (77 percent clothes, 45 percent hair)
- Mexico: 25-point gap (80 percent clothes, 55 percent hair)
- U.K.: 25-point gap (74 percent clothes, 49 percent hair)

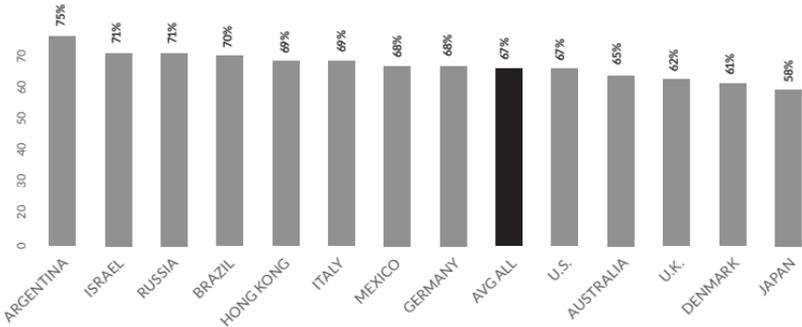
Smokers' smells combined

Averaging the scores of clothes smell and hair smell gives an idea of how generally sensitive nonsmokers are to the smell left by smoking. The biggest and smallest averages (Argentina vs. Japan) are just 17 percentage points apart. This strongly suggests large numbers of nonsmokers in all 13 countries/regions dislike the smell of smokers.

The areas least likely to dislike the smell of smokers are the U.K. (62 percent), Denmark (61 percent) and Japan (58 percent), although even there the majority dislike the smells associated with smoking.

The worst smell of a smoker is their hair

Base: Nonsmokers





Section 4.

Alternatives to
Continued Smoking



The theme of this paper is unsmoking, a call to action that can be summed up in three key points:

IF YOU DON'T SMOKE, DON'T START.
IF YOU SMOKE, QUIT.
IF YOU DON'T QUIT, CHANGE.

The best choice any person can make is never to start smoking. Period.

If someone does smoke, then their best choice is to quit cigarettes and nicotine altogether. This is the best choice whether one is considering consequences on health, social perceptions or relationships.

The third point means that adult smokers who would otherwise continue smoking deserve to have access to and information about smoke-free products that are a better alternative to continued cigarette smoking. Thanks to science and technology, such products exist today. Different providers have their own terminology to refer to the various technologies, which sometimes causes a lack of clarity among consumers regarding the precise distinctions between the various approaches. This is not surprising. For example, some products labeled “smoke-free” involve a vapor (also called an aerosol) that, while not the product of combustion, nevertheless can look like smoke.

Alternatives to Continued Smoking

Given that smoke-free alternatives to continued smoking can play an important role in unsmoking the world, in this survey we were curious to explore awareness of and attitudes toward these alternatives in the 13 countries/regions.

Regulations regarding the sale and marketing of smoke-free alternatives differ greatly around the world. However, even in highly restricted markets, consumers can access online coverage of such products via news reports and social media. And they can gain access to the products themselves by purchasing them when traveling abroad, having a traveling friend bring them back or by ordering them online in some countries/regions.

At the time of the survey fieldwork in the spring of 2019, both e-cigarettes and heat-not-burn (HNB) products, to the best of our knowledge, were available in six of the 13 countries/regions: Denmark, Germany, Israel, Italy, Russia and the U.K. In the U.S., e-cigarettes were available and electrically heated tobacco products were minimally available. In Japan, HNB products were available, but nicotine-containing e-cigarettes were not. In the remaining five countries/regions, neither e-cigarettes nor HNB products were available: Argentina, Australia, Brazil, Hong Kong and Mexico. A full table can be found in the appendices.

Awareness of smoke-free alternatives is high

An overwhelming majority of survey respondents (90 percent) answered “yes” to the question: “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?” Awareness on this point was extremely high across the entire sample:



- 95 percent of smokers and 89 percent of nonsmokers
- 90 percent of both men and women
- 90 percent of each of the three age cohorts

These are astonishingly high levels of awareness if we bear in mind that neither e-cigarettes nor HNB products are available in five of the 13 locations.

Given that the products are not available in Brazil and Hong Kong, it's not surprising that these places are at the bottom of the table. What is surprising is that awareness in the other three markets in which neither product is available is so high: 95 percent in Argentina, 92 percent in Australia and 91 percent in Mexico—although awareness in Australia likely has been boosted by debates in the media regarding these products.

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? (YES)

Base: Total sample



Alternatives to Continued Smoking

However, in consideration of the next data points to be covered in this paper, it is likely that mere awareness of e-cigarettes counts for little when it comes to switching to smoke-free alternatives.

Despite high awareness, many smokers do not have the information they need about smoke-free alternatives

While awareness of e-cigarettes is high, far fewer respondents said they had all of the information they needed about smoke-free alternatives such as e-cigarettes and heat-not-burn tobacco products. This question was put to smokers only, with a slight majority (55 percent) agreeing that they had all the information they need.

Perceived levels of information varied widely between locations. While Hong Kong scored lowest on awareness of e-cigarettes (71 percent—see previous table), it scored highest (66 percent) on “I have all the information I need.” Russia, which returned the highest level of awareness (97 percent), scored only 60 percent on having the information they need—a gap of 37 points. There was a 32-point gap for Italy, which came in second on both awareness (96 percent) and information (64 percent).

Ten of the areas occupied a 13-point range between Hong Kong (66 percent) and Germany (53 percent). The outlying three countries were:

- Japan: 49 percent
- Australia: 43 percent
- Israel: 25 percent



I have all of the information I need about smoke-free alternatives like e-cigarettes and heat-not-burn tobacco products

Base: Smokers



Awareness of heated tobacco products is low

The total sample, including nonsmokers, was asked the question: “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?” Overall, well less than half (41 percent) of the total sample said “yes,” while 59 percent said “no.”

Alternatives to Continued Smoking

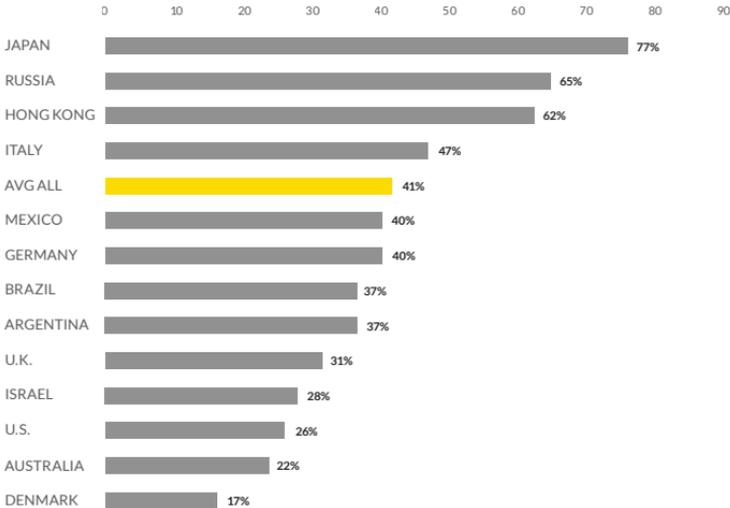
Awareness of HNB was:

- Higher among men than women (46 percent vs. 36 percent)
- Higher among smokers than nonsmokers (59 percent vs. 36 percent)
- Higher among current smokers than occasional smokers (62 percent vs. 52 percent)
- Similar across the age cohorts (21–34, 41 percent; 35–54, 42 percent; 55–74, 38 percent)

In locations where PMI’s heated tobacco product is available⁹, HNB awareness was 44 percent—just seven percentage points higher than in those where it is not. We can see that availability—having products on store shelves—is not necessarily directly correlated with awareness.

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? (YES)

Base: Total sample



9 Manufacturers other than PMI also sell heated tobacco products in Italy, Japan and Russia.



On a country/region level, HNB awareness spread across a huge 60-point range, with the highest level returned by Japan (77 percent) and the lowest returned by Denmark (17 percent).

There was some correlation on levels of information about smoke-free alternatives (see previous table) and awareness of HNB products. At the high end:

- Hong Kong, the places that showed the highest level of information about smoke-free alternatives (66 percent), was also one of the highest for HNB awareness (62 percent).
- Russia returned a high level of information (60 percent) and a high level of HNB awareness (65 percent).

At the low end:

- Israel was lowest on information (25 percent) and among the lowest on HNB awareness (28 percent).
- Australia was second-lowest on both information (43 percent) and HNB awareness (22 percent).

Clarity on smoke-free alternatives needed to support switching from cigarettes

Knowledge of alternatives to continued smoking isn't just an academic "nice to have." It can make a real difference in behavior. More than two-thirds of smokers in the sample (68 percent) said they would be more likely to consider switching to alternative products such as e-cigarettes and heated tobacco products if they had clarity on how these products differ from cigarettes.

Alternatives to Continued Smoking

There was a clear age-related profile in smokers' responses. Agreement was most emphatic among smokers in the 21–34 age cohort (73 percent), a little less emphatic among the 35–54 cohort (69 percent) and significantly lower among the 55–74 cohort (59 percent).

Across the 13 places, the strongest likelihood of switching as a result of enhanced clarity was shown by the Latin American countries:

- Brazil and Mexico (both 85 percent) and Argentina (80 percent)

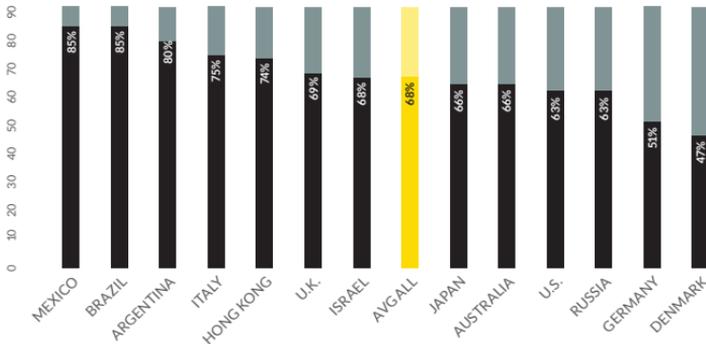
The lowest likelihood was shown by two European neighbors, although neither percentage is negligible:

- Germany (51 percent) and Denmark (47 percent)

This data shows a need for continued access, information and availability of smoke-free alternatives; in markets where smoke-free alternatives are not currently available, the survey shows an increased consideration of switching if greater product clarity were available.

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

Base: Smokers





There is an apparent disconnect over responses to this clarity question compared with responses to the “enough information” question earlier. In that earlier question, majorities of smokers in a number of areas said they had all the information they needed about smoke-free alternatives, yet majorities of smokers in those same places also said they would consider switching if they had more clarity on these products:

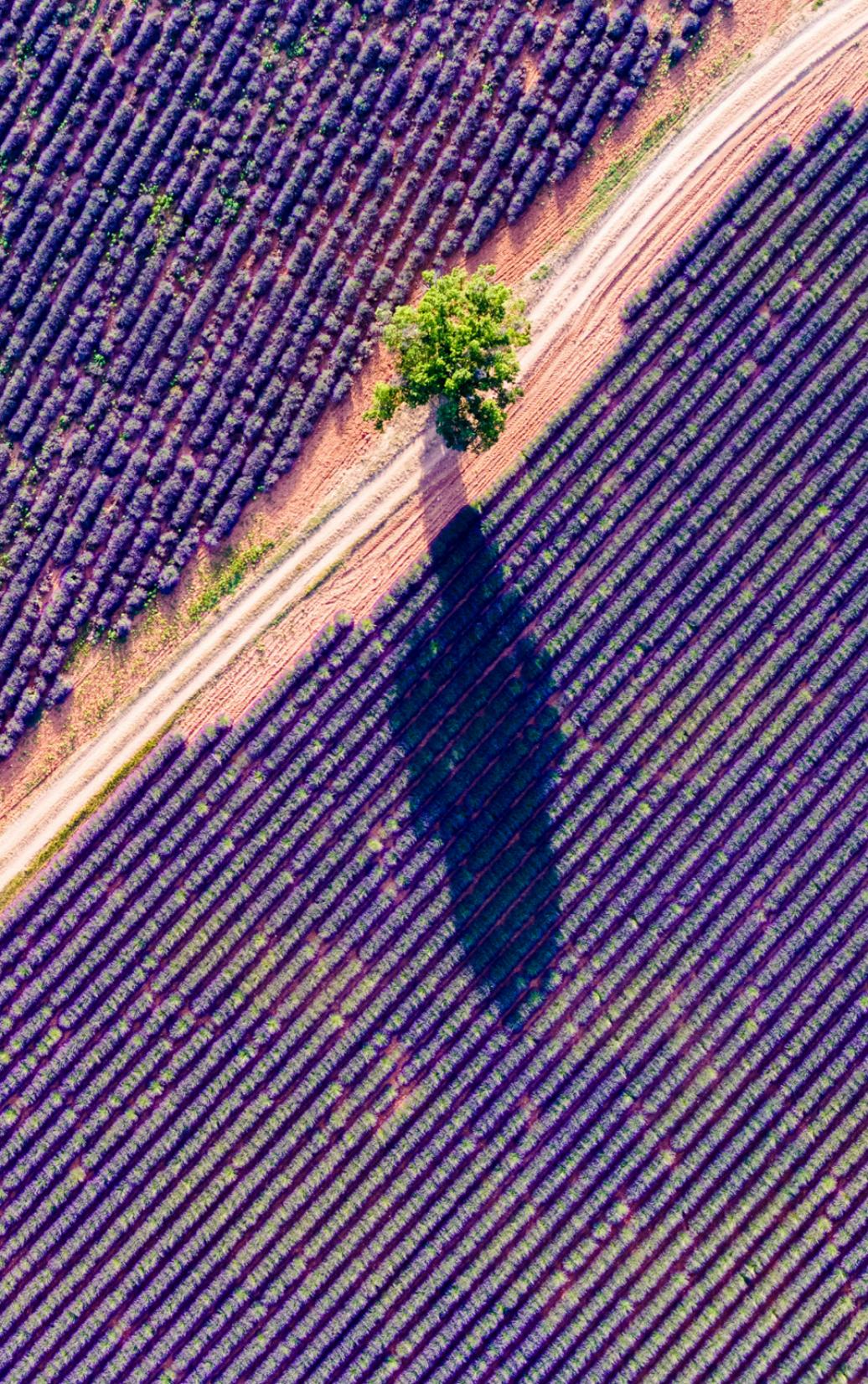
- Hong Kong: 66 percent have enough information and 74 percent need clarity.
- Italy: 64 percent have enough information and 75 percent need clarity.
- Brazil: 62 percent have enough information and 85 percent need clarity.

This strongly suggests that while smokers may feel they have enough information in general about smoke-free alternatives, many do not yet understand the information clearly enough to motivate them to choose such a product.

The second point of PMI’s three-point call of unsmoking clearly states that quitting altogether is the best choice for smokers. “Change”—switching to a better, smoke-free alternative—indicates that those who would otherwise continue to smoke deserve the opportunity to choose better alternatives, a simple reflection of some of PMI’s key corporate positions.

Alternatives to Continued Smoking





Alternatives to Continued Smoking

Nothing compares with quitting altogether, but smoke-free alternatives are better than continued cigarette smoking

Quitting altogether is always the best course of action to address all the issues that arise from smoking. For smokers who don't quit, changing to a smoke-free alternative helps to reduce the negatives, including impacts on relationships and social life.

Of the 16,099 respondents in the survey, 1,361 of them self-identified as former smokers who regularly or occasionally use e-cigarettes or heat-not-burn tobacco products. The survey asked them about perceived changes since switching to smoke-free alternatives.

According to the survey respondents, using a smoke-free alternative has a lesser impact on relationships than continuing to smoke. Almost half (48 percent) of switchers¹⁰ said they are enjoying better relationships with family and friends since they have adopted smoke-free alternatives. And 45 percent said their social lives have improved since switching to smoke-free alternatives. On this score, a higher proportion of men than women reported an improvement (48 percent vs. 41 percent, respectively).

Smokers are likely to be aware, to some degree, that other people dislike the smell of cigarette smoke, which raises the question: Do smokers deliberately want to make themselves and their surroundings smell unpleasant to many? It's highly unlikely that they do, yet smoking has that very effect. It therefore seems reasonable to assume that smokers are accepting the bad smell as an inevitable part of smoking.

10 Respondents who had switched from smoking cigarettes to smoke-free alternatives



Well over half (57 percent) of nonsmokers said smoke-free alternatives have less of an impact on clothes than do cigarettes, while 33 percent neither agreed nor disagreed with the statement. A similar majority (56 percent) prefer visiting the home of someone who uses a smoke-free alternative over visiting the home of a smoker, while 31 percent neither agreed nor disagreed. The relatively high neutral ratings may come from unfamiliarity with the odor associated with smoke-free products.

During meal time, the best option is for no one to smoke and not to use a smoke-free alternative either. In the survey, comparing smoking cigarettes with using smoke-free alternatives during meals, well over half (57 percent) of nonsmokers said they prefer when someone uses smoke-free alternatives during a meal rather than cigarettes. Age appears to play a role in preferences on this point, with scores ranging from 66 percent of the youngest cohort to 58 percent of the middle cohort and 49 percent of the oldest.

In summary, the survey responses show that switching to smoke-free alternatives can reduce the perceptions of unpleasant smells associated with smoking cigarettes. Nevertheless, and to restate the obvious, quitting altogether is always and for all reasons the best course of action.

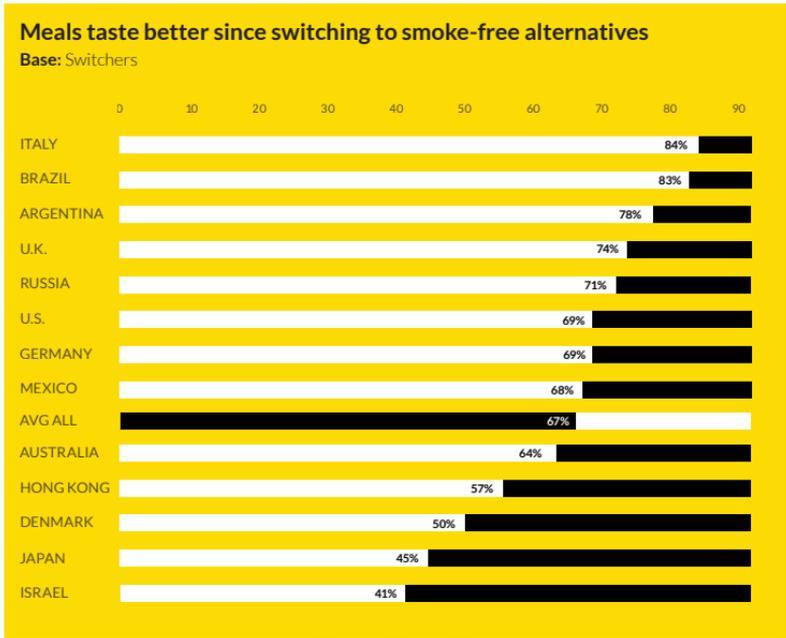
The perspective of smokers who've switched to smoke-free alternatives

Meals tasting better

The topic of taste improvement upon cigarette cessation has been long discussed, without definite conclusion to date.

Alternatives to Continued Smoking

Quitting cigarettes has long been discussed as potentially improving taste perceptions of some former smokers. With regard to such perceptions, our study did not look at quitting altogether (which would on all accounts be the best thing for a smoker to do) and only asked switchers to indicate agreement or disagreement with the statement that meals taste better after switching to a smoke-free alternative. Around two-thirds of switchers (67 percent) agreed on this point. Across the countries in the survey, there were big differences in the proportion of switchers with this perception. At the high end, 84 percent of respondents in Italy said meals taste better compared with just 41 percent of respondents in Israel at the low end.





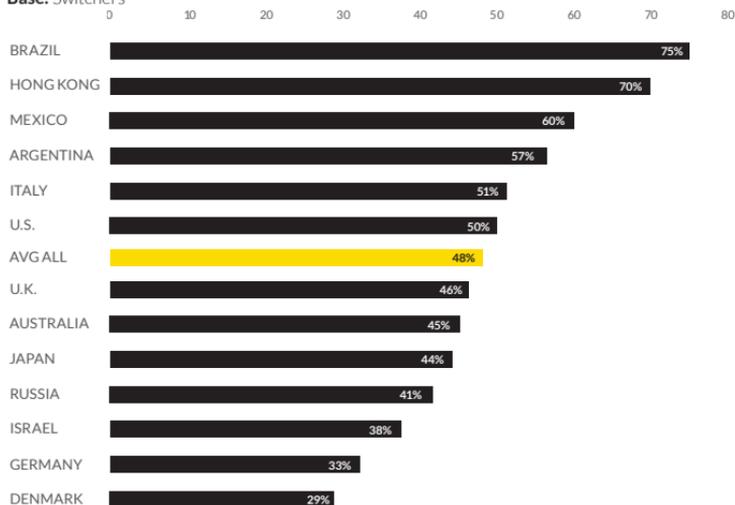
Improved relationships

Almost half of switchers (48 percent) reported better relationships with family and friends since switching to smoke-free alternatives.

- There was little difference between men and women (50 percent vs. 47 percent).
- The change was most likely to be noticed by the youngest and middle cohorts (50 percent of those aged 21–34 and 35–54 vs. 42 percent of those aged 55–74).

I have better relationships with family and friends since switching to smoke-free alternatives

Base: Switchers



Comparing the locales, switchers in Brazil were the most apt (75 percent) to notice improved relationships with family and friends. At the low end, just 33 percent of respondents in Germany and 29 percent in Denmark noticed a difference in their relationships.

Alternatives to Continued Smoking

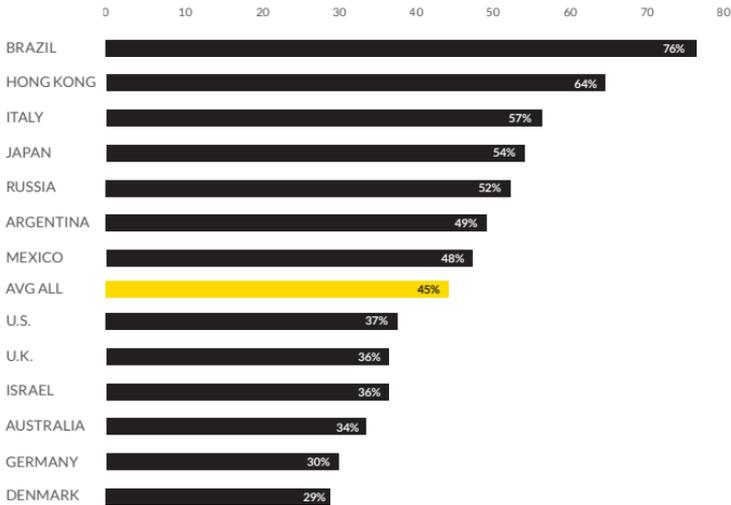
Social life

A large minority of switchers (45 percent) said their social life has improved since switching to smoke-free alternatives.

- This included a higher proportion of men than women (48 percent vs. 41 percent).
- The change was most apt to be noticed by the middle age cohort and least by the oldest: 21–34, 44 percent; 35–54, 48 percent; 55–74, 38 percent.

My social life has improved since switching to smoke-free alternatives

Base: Switchers

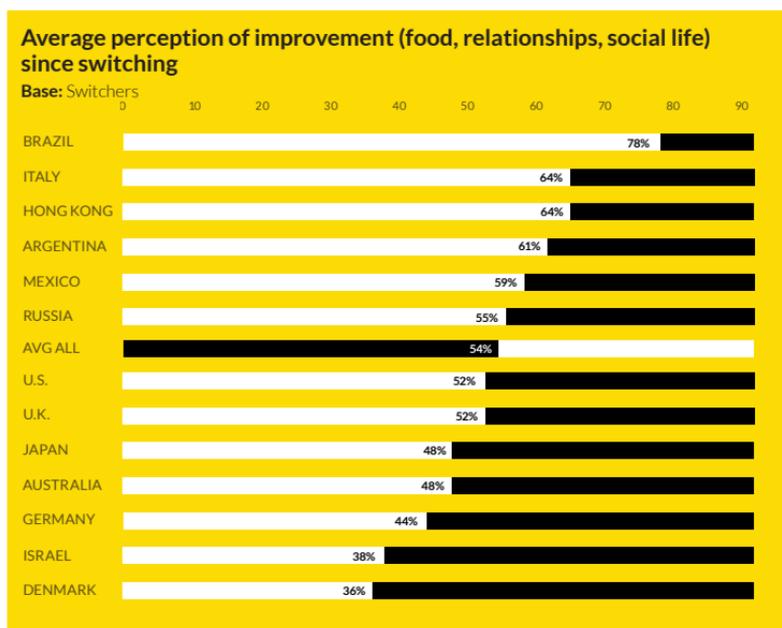


Comparing locales, switchers in Brazil were the most apt (76 percent) to notice an improved social life. At the low end, just 30 percent of respondents in Germany and 29 percent in Denmark noticed a difference in their social lives.



Overall better perception

By calculating the mean responses to the three areas of improvement reported by switchers (meals, relationships and social life), it's possible to see which countries/regions overall are most apt to perceive a positive difference from switching.



People in Brazil are by some margin the most likely to perceive improvements. Their average of 78 percent is significantly higher than those of the other top scorers: Italy and Hong Kong (both 64 percent), Argentina (61 percent) and Mexico (59 percent).

Here, too, Denmark (36 percent) and Israel (38 percent) continued their pattern of appearing low on the table.

Alternatives to Continued Smoking

The perspective of the nonsmoker

Since nonsmokers also have to bear the burden of smells, we wanted to ask them how the smell of smoke-free products compares with that of combustible cigarettes. In our sample, 13,007 respondents were classified as nonsmokers (combining former smokers and never smokers).

As raised earlier in this section, it's unlikely that smokers deliberately want to make themselves and their surroundings smell unpleasant. It therefore seems reasonable to assume that smokers are accepting the bad smell as an inevitable part of smoking.

Nonsmokers, by contrast, have not chosen to smoke nor to live with the smell. At best, they tolerate the smell of smokers; at worst, they may minimize interactions with smokers because of the smell. Nonsmokers tend to be sensitive to the smell of smoking, so how do they find the smell of smoke-free alternatives in comparison? The survey quizzed nonsmokers on this point from several angles.

Impact on clothes

The smell of smokers' clothes was a big negative for nonsmokers, so how do smoke-free alternatives affect clothes? Well over half (57 percent) of nonsmokers said smoke-free alternatives have less of an impact on clothes than do cigarettes (with 33 percent neither agreeing nor disagreeing, which may stem from a lack of familiarity with the sensory effects of smoke-free products).

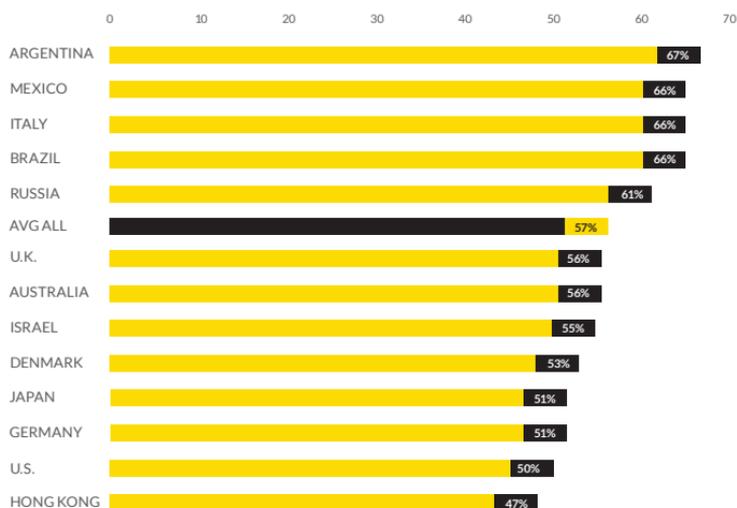


Across the age cohorts, perceptions that smoke-free products have a lesser impact on clothes decreased with age:

- Age 21–34: 62 percent
- Age 35–54: 59 percent
- Age 55–74: 50 percent

Smoke-free alternatives have less of an impact on clothes than cigarettes

Base: Nonsmokers



More women than men (59 percent vs. 55 percent) have found that smoke-free has less of an impact than cigarettes on the smell of clothes.

The lesser impact of smoke-free on clothes is most strongly perceived in the Latin American countries—Argentina (67 percent), Mexico and Brazil (both 66 percent)—and Italy (66 percent).

Alternatives to Continued Smoking

Impact on homes

As noted earlier in this paper, more than two-thirds of nonsmokers (69 percent) don't like visiting the homes of smokers because they are uncomfortable with the smell of smoke. Fifty-six percent said they would prefer visiting the home of someone who uses a smoke-free-alternative to visiting the home of a smoker.

Looking again at the subgroups of nonsmokers, 58 percent of never smokers preferred visiting smoke-free-alternative homes to the homes of smokers.

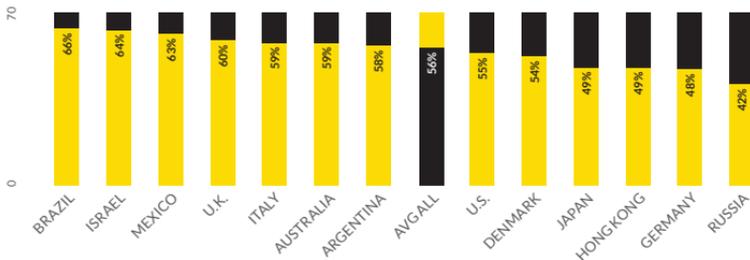
Perceptions that smoke-free products have a lesser impact than cigarettes on the smell of homes decreased with age:

- Age 21-34: 61 percent
- Age 35-54: 57 percent
- Age 55-74: 50 percent

More women than men (59 percent vs. 53 percent) have found that smoke-free has less of an impact than cigarettes on homes.

I would prefer visiting the home of someone who uses a smoke-free alternative than visiting the home of a smoker

Base: Nonsmokers





As with the impact on clothes, the Latin countries are more emphatic than average in their preference for visiting homes inhabited by smoke-free users rather than smokers:

- Brazil: 66 percent
- Mexico: 63 percent
- Italy: 59 percent
- Argentina: 58 percent

Mealtimes

In many parts of the world, it's not permitted to smoke in enclosed public spaces such as restaurants and bars. Nevertheless, there are places where nonsmokers do encounter cigarette smoke while attempting to enjoy a meal or drink.

Just under half (47 percent) of nonsmokers in the survey said that when they're enjoying a meal or beverage, having someone close by using a smoke-free alternative does not bother them as much as someone smoking a cigarette.

Perceptions of the lesser impact of smoke-free products on dining and drinking experiences decreased with age:

- Age 21–34: 54 percent
- Age 35–54: 48 percent
- Age 55–74: 39 percent

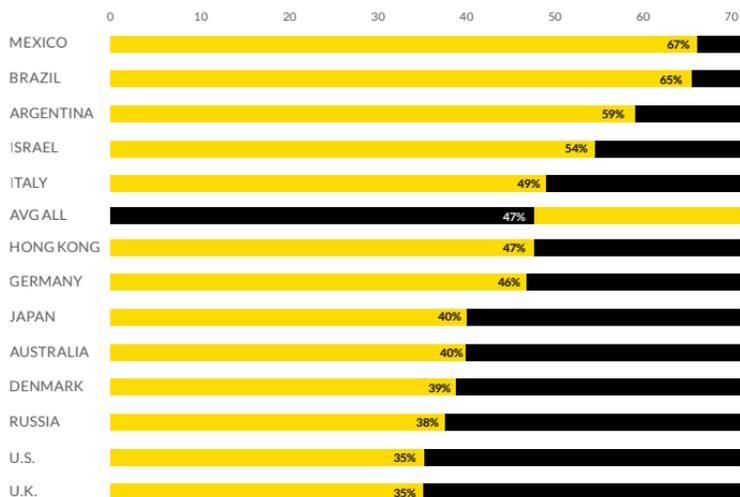
More women than men (49 percent vs. 45 percent) found smoke-free has less impact on food and beverage occasions.





If I am enjoying a meal or beverage, someone using a smoke-free alternative does not bother me compared to someone using cigarettes

Base: Nonsmokers



The Latin American countries are clearly the ones where nonsmokers are most accepting of someone using a smoke-free alternative during meals:

- Mexico: 67 percent
- Brazil: 65 percent
- Argentina: 59 percent

Once again, the English-speaking countries show similar responses to this statement:

- Australia: 40 percent
- U.S. and U.K.: 35 percent

Overall smoke-free

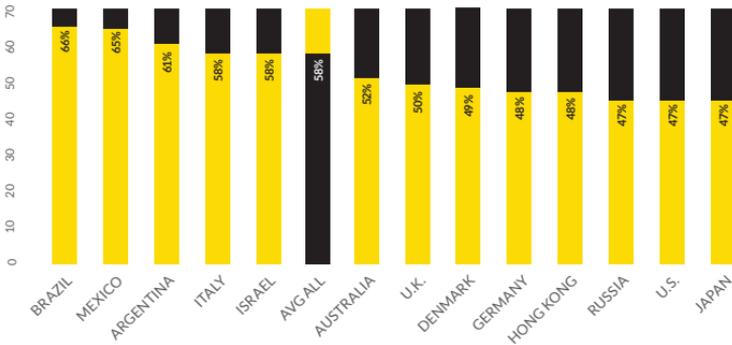
By calculating the mean responses to the three areas (clothes/home/eating and drinking) in which nonsmokers compared the impact of

Alternatives to Continued Smoking

smoke-free alternatives with cigarettes, it's possible to get an overall read of which countries/regions are most apt to have a positive attitude toward smoke-free alternatives.

Average perception of better smoke-free impact on clothes, home, eating/drinking compared with cigarettes

Base: Nonsmokers



This averaged overview shows that nonsmokers in Latin America are the most apt to appreciate the impact of smoke-free alternatives compared with smoking cigarettes:

- Brazil and Mexico: 65 percent
- Argentina: 61 percent

Close behind are Italy and Israel (both 58 percent).

While quitting altogether is always and for all the reason the best course of action, the survey responses show that, compared with continuing to smoke cigarettes, switching to smoke-free alternatives can significantly reduce the perceptions of unpleasant smells.



Section 5.

Desire for Support
to Unsmoke



In the space of a few decades, the status of smoking has changed. Smoking used to be widely accepted by societies at large. Smokers assumed they could smoke virtually anywhere and everywhere, and did.

Now, smoking is increasingly less accepted by society at large in many places. In fact, far from being accepted, smoking in public places has been restricted or banned in many places. To the extent that smoking signals shades of social status and identity, they are not desirable in many places.

Society as a whole now exhorts smokers to give up smoking, but while that doubtless has an effect, society as a whole is impersonal. Smokers are looking for support and encouragement from a range of people.

To whom do smokers look for support in giving up smoking?

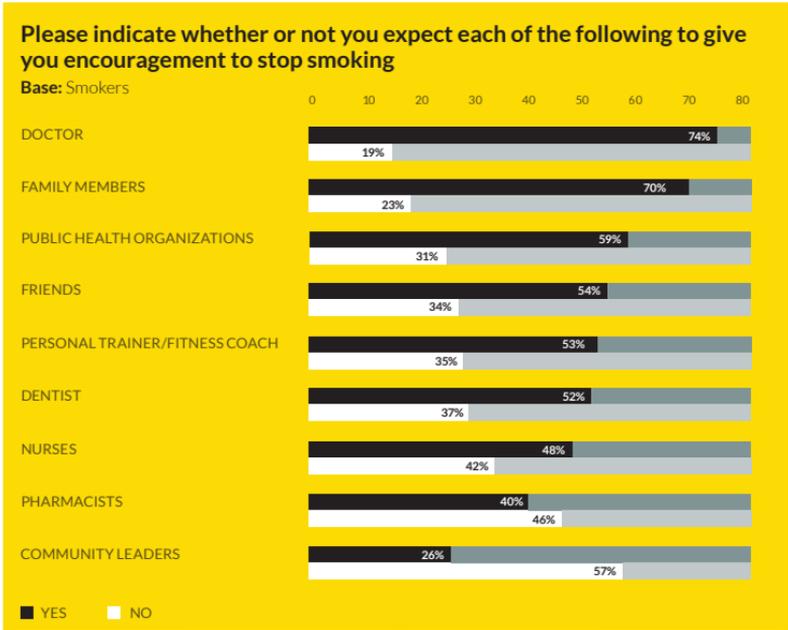
The survey gave smokers a list of types of people and asked: "Please indicate whether or not you expect each of the following to give you encouragement to stop smoking."

Not surprisingly, doctors were at the top of the list. Almost three-quarters (74 percent) of smokers in the survey said they expect doctors to encourage them to stop. What's surprising, perhaps, is that 19 percent do not expect stop-smoking encouragement from doctors. Narrowly behind doctors were family members (70 percent). These are the people with the greatest personal stake in looking after a smoker's well-being, as well as the people most likely to be exposed to a smoker's smoke and smell. This is corroborated

Desire for Support to Unsmoke

by the 93 percent of respondents from the total sample who said “yes” to the question, “Would you support a family member or a friend in their journey to quit cigarettes?”

More than half (59 percent) of smokers expected encouragement to stop smoking from public health organizations. In practice, in many countries and regions such organizations are likely to be the bodies that most frequently and noticeably promote anti-smoking messages. It’s part of their remit.





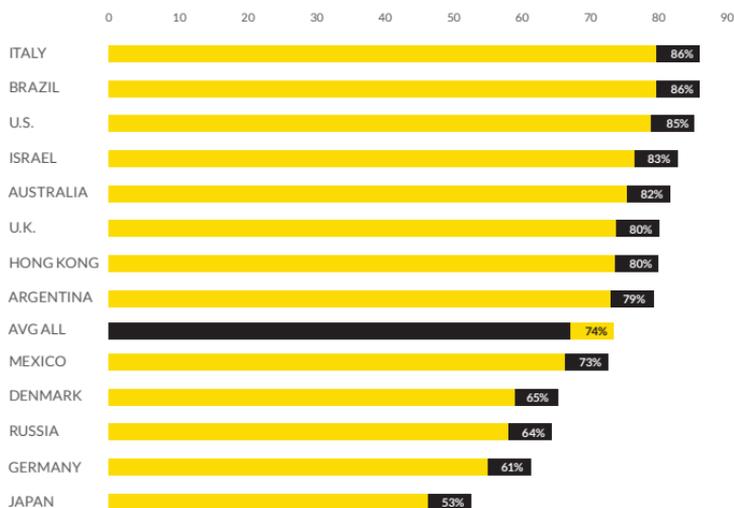
Expecting encouragement from doctors to stop smoking—by subgroup

While around three-quarters of smokers overall expect doctors to encourage them to stop smoking, there were variations across subgroups and countries:

- This expectation was higher among occasional smokers (80 percent) than current smokers (72 percent).
- It was also higher among younger smokers:
 - Age 21–34: 77 percent
 - Age 35–54: 74 percent
 - Age 55–74: 71 percent
- There was no difference between men and women (both 74 percent).

Expecting encouragement from friends to stop smoking—by country/region

Base: Smokers







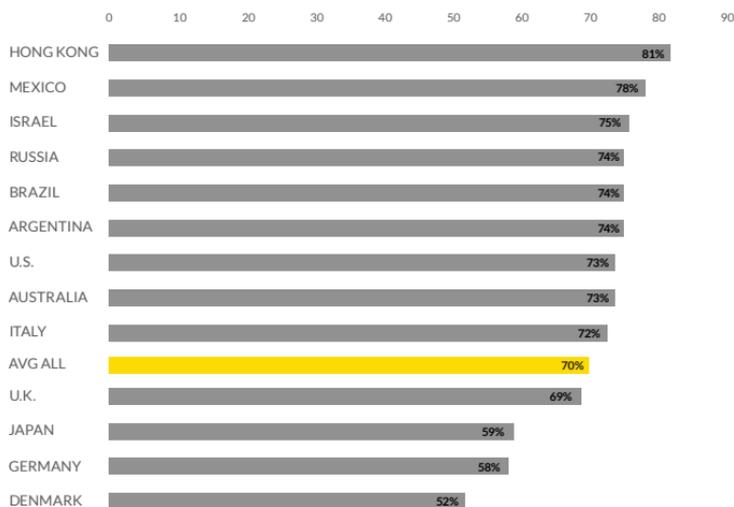
Expecting encouragement from family members to stop smoking—by subgroup

Overall, seven in 10 smokers expect family members to encourage them to stop smoking, with some variations across subgroups.

- This expectation was higher among occasional smokers (78 percent) than current smokers (67 percent).
- It was also higher among younger smokers:
 - Age 21–34: 75 percent
 - Age 35–54: 70 percent
 - Age 55–74: 64 percent
- There was little difference between men (71 percent) and women (69 percent).

Expecting encouragement from family members to stop smoking—by country/region

Base: Smokers



Desire for Support to Unsmoke

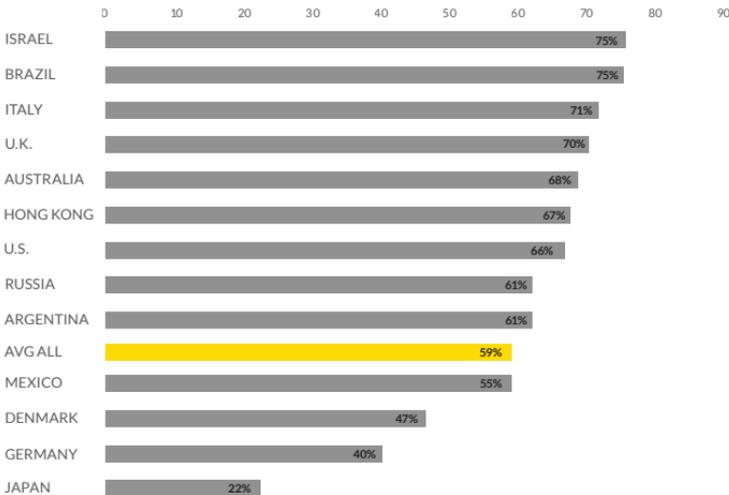
Expecting encouragement from public health organizations to stop smoking—by subgroup

With an average of 59 percent, smokers' expectations of support from public health organizations to encourage them to stop smoking was strikingly lower than for doctors (74 percent) and family members (70 percent). There were variations across the subgroups:

- Expectations were higher among occasional smokers (67 percent) than current smokers (56 percent).
- They were also higher among younger smokers:
 - Age 21–34: 64 percent
 - Age 35–54: 59 percent
 - Age 55–74: 54 percent
- There was little difference between men (59 percent) and women (60 percent) on this score.

Expecting encouragement from public health organizations to stop smoking—by country/region

Base: Smokers





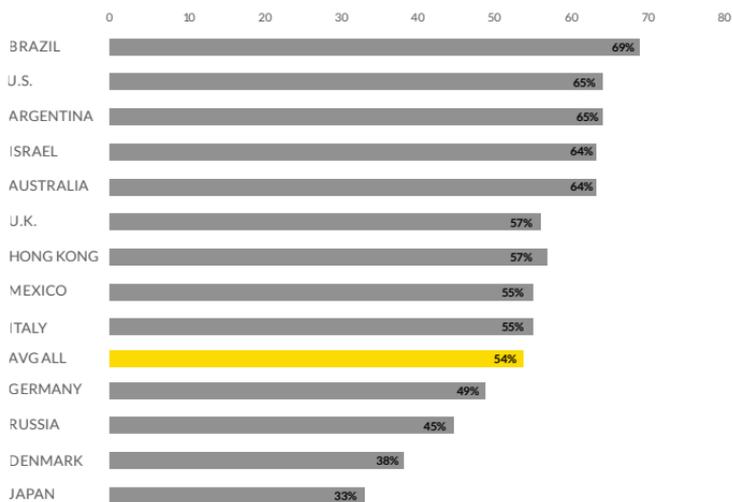
Expecting encouragement from friends to stop smoking—by subgroup

Around half of smokers (54 percent) expect friends to encourage them to stop smoking, with some variation across subgroups:

- Expectations were higher among occasional smokers (63 percent) than current smokers (51 percent).
- They were also higher among younger smokers:
 - Age 21–34: 60 percent
 - Age 35–54: 54 percent
 - Age 55–74: 47 percent
- There was only a slight difference between men (53 percent) and women (56 percent).

Expecting encouragement from friends to stop smoking—by country/region

Base: Smokers



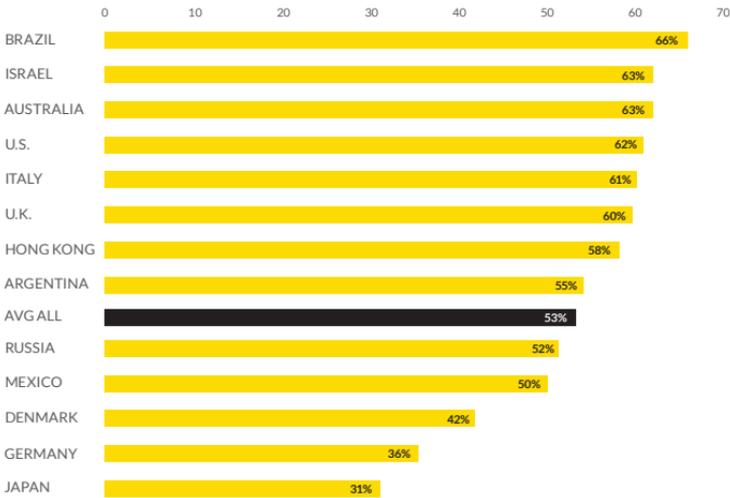
Desire for Support to Unsmoke

Expecting encouragement to stop smoking—overall country/region averages

The previous tables show how national cultures have varying expectations of who will encourage people to stop smoking. For instance, smokers in Brazil (69 percent) are significantly more likely than smokers in Japan (33 percent) to expect their friends to encourage them to stop smoking. Looking beyond the individual sources of encouragement (e.g., doctor, family), the following table provides an overview of the extent to which smokers in the 13 countries/regions expect encouragement to stop smoking from any of the nine listed sources.¹¹

The figures in the table show the averages calculated from each location’s responses and represent relative expectations of encouragement to stop smoking.

Base: Smokers



11 Doctor, family members, public health organizations, friends, personal trainer/fitness coach, dentist, nurses, pharmacists, community leaders



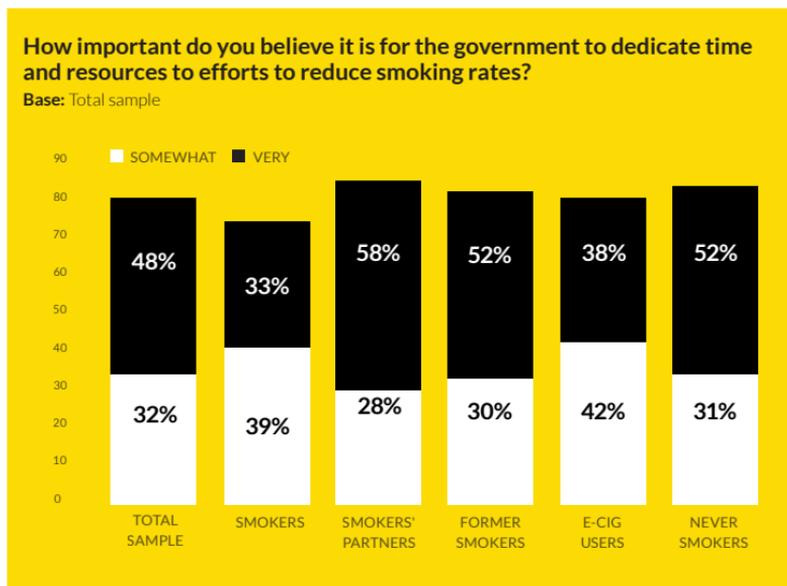
Section 6.

What Should Be Done
to Make Cigarettes
a Thing of the Past



Government time and resources—by subgroup

Government action is high on the list of what's needed to make cigarettes a thing of the past. In the survey, more than four-fifths of respondents (81 percent)¹² thought it was important for governments to dedicate time and resources to efforts to reduce smoking rates. This was rated important by 72 percent of smokers (33 percent very, 39 percent somewhat), while a quarter (25 percent) actually rated it not important. The most emphatic were the partners of smokers—86 percent of whom rated government action as important, including 58 percent who rated it very important. Apart from smokers themselves, their partners are arguably the ones with the keenest personal interest in smokers quitting the habit.



12 All percentages are rounded. The "somewhat" and "very" percentages rounded down, but when combined the number is rounded up.

What Should Be Done to Make Cigarettes a Thing of the Past

Across subgroups, there was relatively little difference in total perceptions of importance:

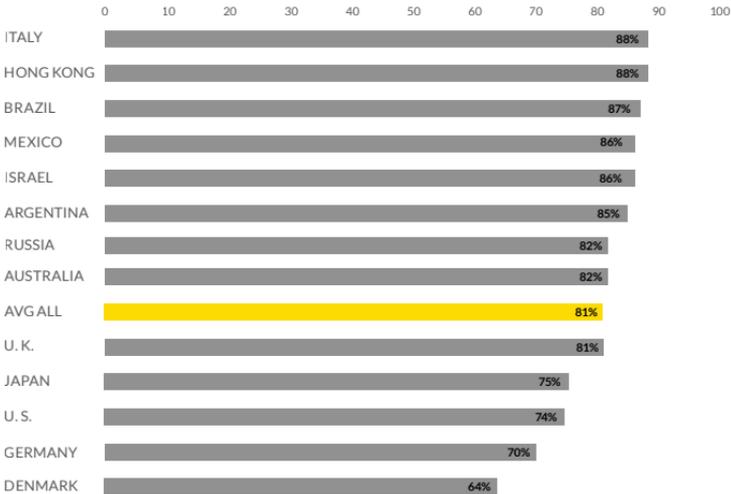
- Gender groups:
 - Men: 80 percent
 - Women: 81 percent
- Age cohorts:
 - Age 21–34: 79 percent
 - Age 35–54: 81 percent
 - Age 55–74: 81 percent

Government time and resources—by country/region

Clear majorities in all countries/regions thought it important for governments to dedicate time and resources to reducing smoking rates. In nine of the 13, more than 80 percent of respondents held this view. And even in the remaining four markets—Japan (75 percent), U.S. (74 percent), Germany (70 percent) and Denmark (64 percent)—support was strong.

How important do you believe it is for the government to dedicate time and resources to efforts to reduce smoking rates? (Showing somewhat/very important)

Base: Total sample





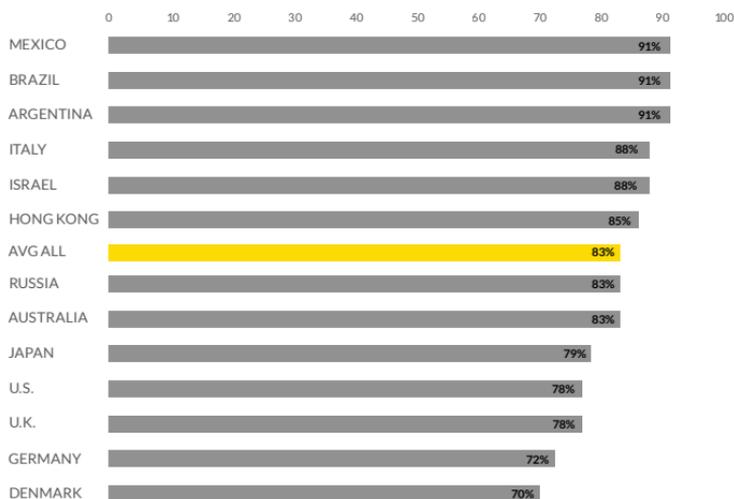
These figures indicate that support for government action to reduce smoking rates is widespread in all 13 countries/regions.

A new conversation needed

It's not just government action that's called for. In fact, large majorities of respondents said it will take more than government measures to bring smoking levels down significantly. More than four-fifths (83 percent) think that more regulation and taxation alone will not succeed in making their country/region smoke-free and that a new conversation is needed to reduce smoking rates. There were no noteworthy differences in levels of agreement between the subgroups on this point, whether by gender, age or smoker status. There were, however, differences between the countries/regions. The statement received agreement from clear majorities in all places, including from more than nine in 10 respondents in Mexico, Brazil and Argentina.

More regulation and taxation alone will not succeed in making this country smoke-free—a new conversation is needed to reduce smoking rates

Base: Total sample



What Should Be Done to Make Cigarettes a Thing of the Past

Once again, even in the less emphatic countries—Japan (79 percent), U.S. and U.K. (78 percent), Germany (72 percent) and Denmark (70 percent)—support was strong.

Better conversations with smokers

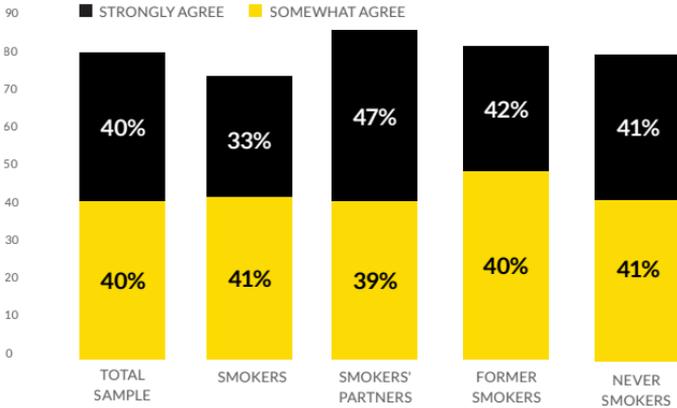
When considering the quality of conversation, four out of five respondents said it is time for a better conversation with smokers to make cigarettes a thing of the past. As with the “government time and resources” question above, smokers themselves were not quite as keen (74 percent) as former smokers (82 percent) and never smokers (82 percent).

Better conversations—by subgroup

As on the “government time and resources” question, the partners of smokers were the keenest of all (86 percent) for better conversations with smokers.

It is time for a better conversation with smokers in order to make cigarettes a thing of the past

Base: Total sample

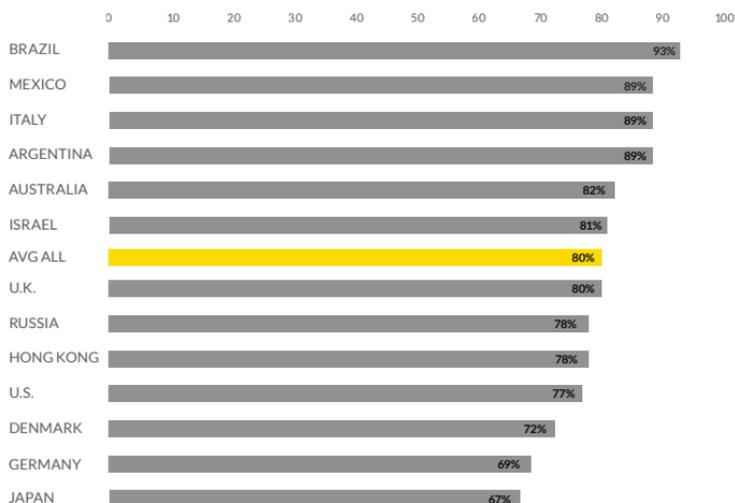




Better conversations—by country/region

It's time for a better conversation with smokers in order to make cigarettes a thing of the past

Base: Total sample



This is another question that prompted clear majority agreement in all markets, with 10 of the 13 countries returning agreement levels in excess of 75 percent.

Access to information about smoke-free alternatives

The survey also found high levels of agreement with the statement: “Smokers who would otherwise continue smoking cigarettes should have access to, and accurate information about, smoke-free alternatives.” Overall, 83 percent of respondents agreed with this statement, with levels of agreement standing at 86 percent for smokers, 85 percent for former smokers and 81 percent for never smokers.

What Should Be Done to Make Cigarettes a Thing of the Past

There was no difference in responses by gender:

- Both men and women: 83 percent

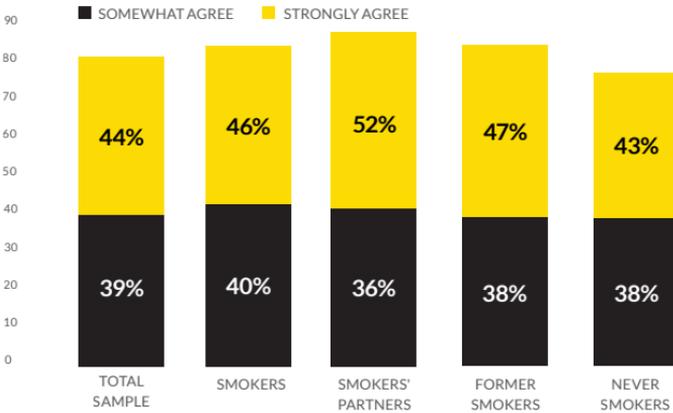
Nor was there much difference by age cohort:

- Age 21–34: 84 percent
- Age 35–54: 83 percent
- Age 55–74: 82 percent

Smoke-free alternatives access—by subgroup

Smokers who would otherwise continue smoking cigarettes should have access to, and accurate information about, smoke-free alternatives

Base: Total sample



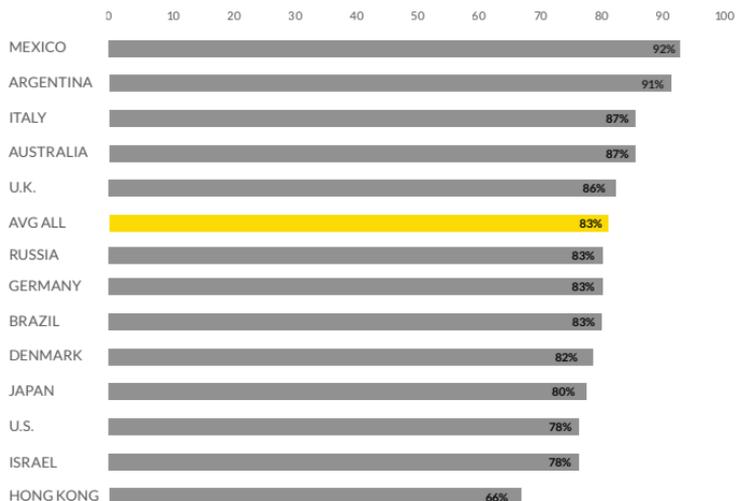
On this question, too, the partners of smokers scored higher-than-average agreement, with an aggregate of 88 percent. As noted elsewhere, they arguably have a strong personal incentive to support efforts to move smokers away from cigarettes.



Smoke-free alternatives access—by country

Smokers who would otherwise continue smoking cigarettes should have access to, and accurate information about, smoke-free alternatives

Base: Total sample



The level of agreement with this statement was extremely strong across markets, with 12 of the 13 regions returning scores in excess of 75 percent. Hong Kong was the relatively low outlier, with “just” two-thirds agreeing.

There is clearly a high level of demand for access to accurate information about smoke-free alternatives, but, as reported earlier, many smokers do not have the smoke-free information they need.

What Should Be Done to Make Cigarettes a Thing of the Past

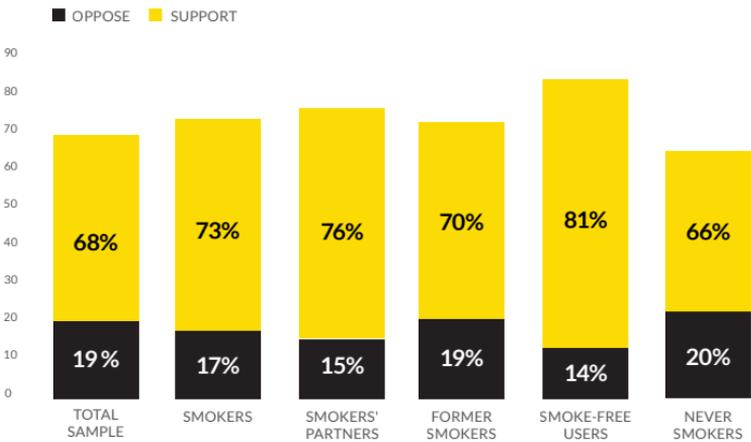
Support for tobacco companies working on smoke-free alternatives

The survey asked respondents whether they 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 such as e-cigarettes and heat-not-burn tobacco products. Overall, more than two-thirds of respondents (68 percent) supported the idea, while 19 percent opposed it and 12 percent were unsure.

Tobacco companies working on smoke-free alternatives—by subgroup

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?

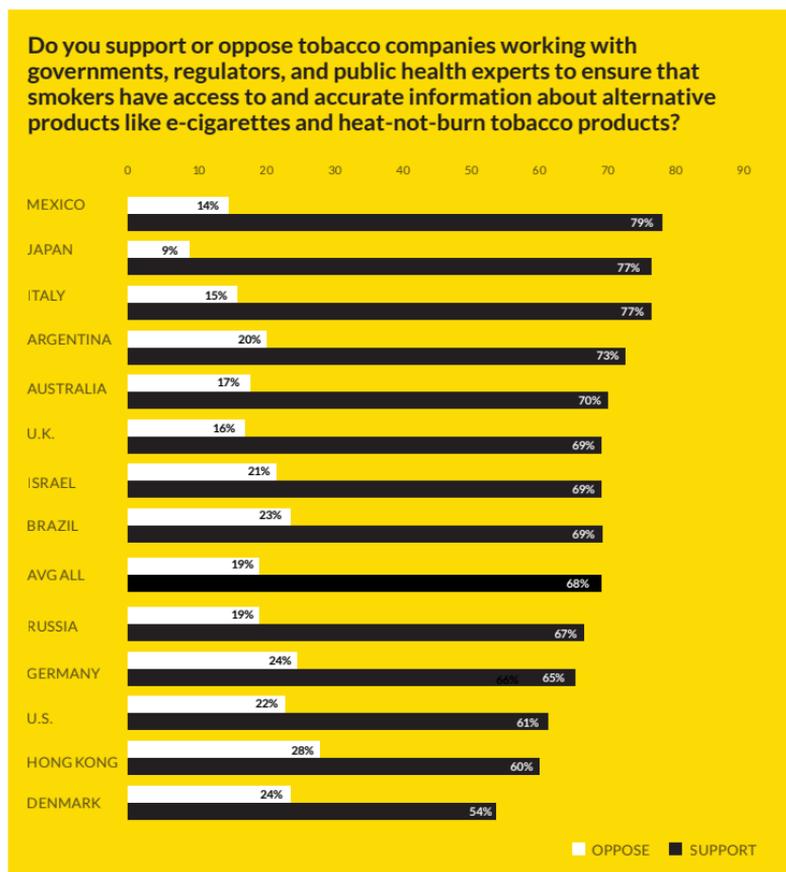
Base: Total sample





Tobacco companies working on smoke-free alternatives—by country/region

Net support for tobacco companies working with governments, regulators and public health experts (support minus oppose) ranged from a high of 68 percent in Japan and 65 percent in Mexico to a low of 32 percent in Hong Kong and 30 percent in Denmark.



What Should Be Done to Make Cigarettes a Thing of the Past

Although the level of net support ranged widely between countries, it was net positive overall. In other words, a majority in each of the 13 countries is in favor of tobacco companies working with governments, regulators and public health experts to provide smokers who would otherwise continue smoking with access to and accurate information about smoke-free alternatives.



Section 7.

What's the Deal
with *Unsmoke*?



The survey looks at a variety of elements that may be contributing to a smoke-free world—a conversation turbocharged by PMI that we have called “unsmoke.”¹³ This is an invented word, but we believe its general intention should be obvious to people familiar with the English language. We have spelled out our intended meaning as follows:

To unsmoke means to rid smoke from your life. The act of unsmoking unites smokers and nonsmokers who want to unsmoke themselves, family and friends. The best way to unsmoke is to quit cigarettes and nicotine completely, but the next best way is to switch to better alternatives.

If you don't smoke, don't start.

If you smoke, quit.

If you don't quit, change.

Unsmoke.

As with other new words that gain currency, we hope that *unsmoke* will catch on over time.

As a baseline, we checked with respondents¹⁴ to see whether the word communicated its intended meaning to them: “The word *unsmoking* makes me think about people who are making better choices since smoke has a negative connotation.”

13 <https://www.unsmokeyourworld.com/>

14 Total sample: n=10,796; note: This question was added after fieldwork began.

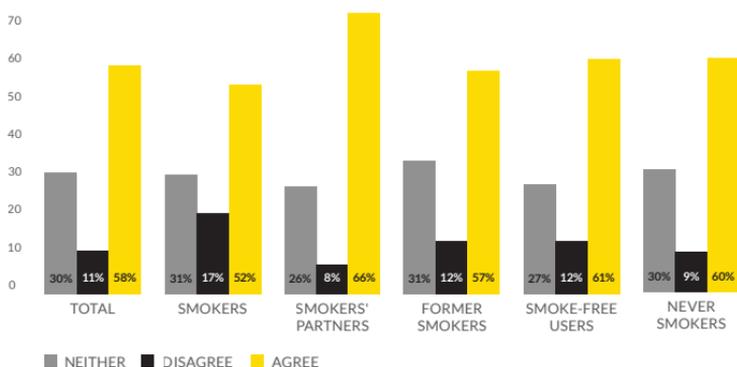
What's the Deal with *Unsmoke*?

Unsmoking—by subgroup

Overall, more than half of respondents (58 percent) agreed that the word *unsmoking* makes them think about people who are making better choices since smoke has a negative connotation, while 11 percent disagreed and 30 percent neither agreed nor disagreed.

The word *unsmoking* makes me think about people who are making better choices since smoke has a negative connotation

Base: Total sample



Once again, partners of smokers returned a particularly strong positive response (66 percent).

Unsmoking scored more strongly among younger than older respondents:

- Age 21–34: 61 percent
- Age 35–54: 59 percent
- Age 55–74: 54 percent



Unsmoking—by country

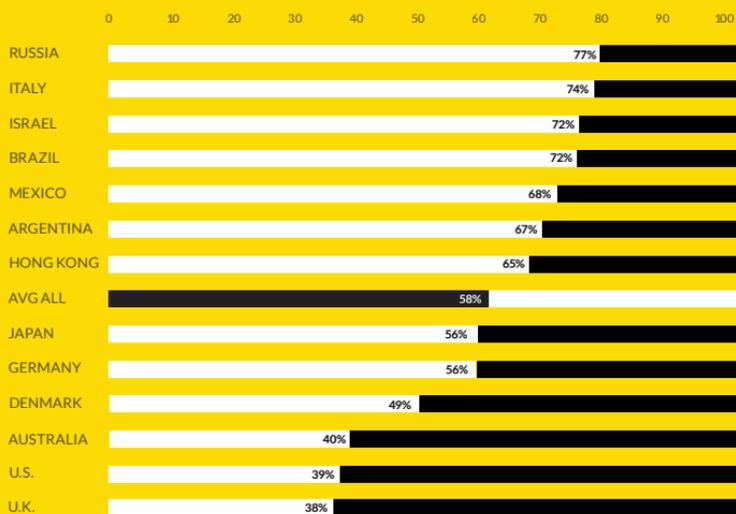
The word *unsmoking* was used only in the countries where English is the first language (Australia, U.K. and U.S.). In the other markets, a version in the local language was used.

It should be noted that *unsmoking* is not a standard word in English. It's a newly invented word, like *podcast*, *bromance* and *hangry* were before they gained currency. *Unsmoking* and *unsmoke* do not have a pre-established meaning, but it is hoped that the intended meaning is apparent from their parts. The renditions in other languages, in contrast, are closer to being translations than newly invented words. This might explain why *unsmoking* scored lowest in the three English-speaking countries:

- Australia: 40 percent
- U.S.: 39 percent
- U.K.: 38 percent

The word *unsmoking* makes me think about people who are making better choices since smoke has a negative connotation

Base: Total sample







Section 8.

Attitudes Toward
Change and Innovation



“No man is an island,” as poet John Donne noted. Individuals may decide to change, but their decision and their success in changing is influenced by others and, in turn, influences others. Changes can ripple through social networks.¹⁵ And it matters to individuals whether others change and support their change.

With this in mind, the survey asked respondents to rate agreement with the statement: “I think highly of people who try new products and embrace innovations in their everyday life.”

Individual innovation and change—by subgroup

The overall level of agreement with this statement was 63 percent, with just 5 percent disagreeing and 32 percent neither agreeing nor disagreeing. All in all, respondents had a positive attitude toward people who change and innovate in their daily life. Few had a negative response.

In the smoking-related subgroups, the most change-positive were partners of smokers (70 percent).

Men proved to be less change-positive than women (61 percent vs. 66 percent).

As might be expected, younger respondents were more change-positive than older respondents:

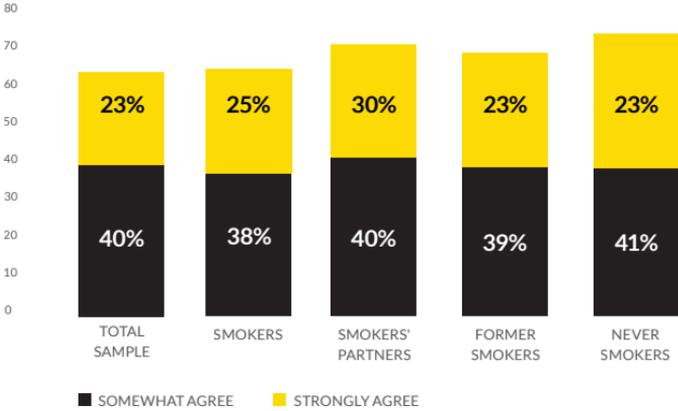
- Age 21–34: 70 percent
- Age 35–54: 65 percent
- Age 55–74: 55 percent

15 <https://www.npr.org/templates/story/story.php?storyId=90681873>

Attitudes Toward Change and Innovation

I think highly of people who try new products and embrace innovations in their everyday life

Base: Total sample





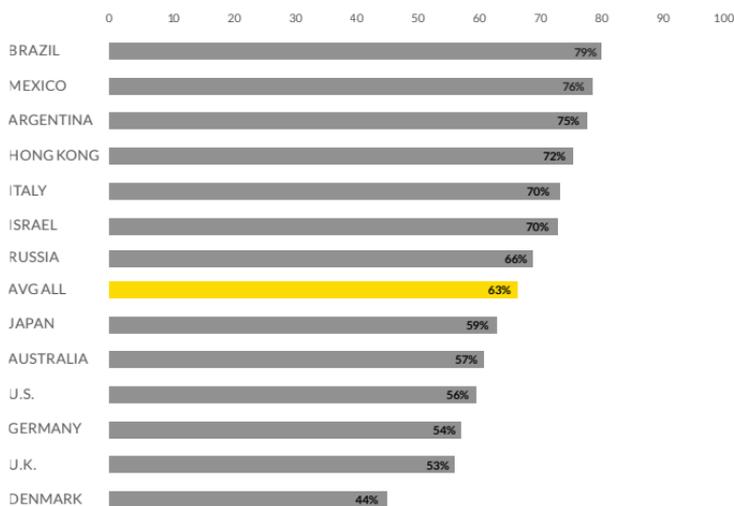
Individual innovation and change—by country/region

Analysis by location shows substantial differences in local attitudes toward people who try new products and embrace innovations in their everyday life.

The highest levels of positive attitudes toward change were found in Brazil (79 percent), Mexico (76 percent) and Argentina (75 percent).

I think highly of people who try new products and embrace innovations in their everyday life

Base: Total sample



As on a number of other questions and statements, the percentages from Denmark and Germany were well below the average.





Appendices.



Appendix 1: Location-Specific Survey Findings

Argentina

Respondents in Argentina showed above-average support for increased government resources dedicated to reducing smoking rates. They agreed more than the global average (91 percent vs. 83 percent) that a new conversation is needed with smokers since more regulation and taxation alone will not succeed in making the country smoke-free.

Interestingly for a country without legal access to e-cigs, people in Argentina show above-average awareness of them (95 percent vs. 90 percent). Conversely, awareness of heated tobacco is slightly below the global average but, at 37 percent, is far from negligible. We should also note that although there is no legal sale of smoke-free alternatives in this country, it is still possible that e-cigs are sold. In contrast, since the vast majority of heated tobacco products are distributed by large companies with a tighter control of their supply chains, these products are less likely to be found illicitly.

Despite or perhaps as a result of this lack of availability, people in Argentina are broadly positive about the need for better access to and information about smoke-free alternatives. They agreed more than the global average (91 percent vs. 83 percent) that smokers should have access to this information and to the products themselves. Similarly, they agree more than the global average (89 percent vs. 74 percent) that encouraging adult smokers who would otherwise continue to smoke to switch to smoke-free alternatives could complement other efforts to reduce the societal harm of smoking. Indeed, a lack of access and encouragement from official channels appears to be a significant factor holding back smokers in this country from switching. This is supported by the fact that 80 percent of smokers in Argentina (vs. global average 68 percent) say they would be more likely to switch to alternatives if they had more clarity on how the products differ from cigarettes.

With the regulatory environment in mind, we can now delve into the social perceptions around smoking. As in Mediterranean countries, Latin American countries tend to be particularly sensitive to smoking during meal times. A higher percentage of people in Argentina (90 percent vs. global average 79 percent) have had a meal interrupted by someone going out to smoke. It is interesting to see, then, that 59 percent of them (vs. global average 47 percent) do not feel bothered by the use of smoke-free alternatives during meals, compared with cigarettes. Quitting cigarettes has long been discussed as potentially improving taste perceptions of some former smokers. With regard to such perceptions, our study did not look at quitting altogether—which would on all accounts be the best thing for a smoker to do—and only asked one question: whether meals tasted better after switching to a smoke-free alternative. Among those smokers in Argentina who have switched to a smoke-free alternative (“switchers”), almost 78 percent (vs. global average 67 percent) say meals have tasted better since they made the switch. Switchers also claim to a higher degree than the global average (57 percent vs. 48 percent) to be enjoying better relationships with friends and family and a better social life post-switch.

Sampling:

n=1,230, general population adults, 21–74 years of age, throughout Argentina. A booster sample was used to secure n=350 adult smokers and n=100 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

Argentina smoker status:

- 15 percent of respondents are current smokers.
- 9 percent are occasional smokers.
- 24 percent are former smokers.
- 52 percent are never smokers.

Switchers represent 3 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or



heat-not-burn tobacco products. Smokers' partners represent 9 percent of the total sample and are defined as former or never smokers who have a partner who smokes.



Australia

Australia is a highly distinctive market among English-speaking nations, as it is one of the most legally restrictive in terms of smoke-free alternatives. While the survey shows e-cigarette awareness around the global average (92 percent vs. global average 90 percent), awareness of heat-not-burn is almost 20 points below the average (22 percent vs. global average 41 percent).

It is interesting to note that in a country with some of the highest cigarette taxes, people in Australia are in line with the high global average (83 percent) that more taxation and regulation alone will not succeed in making the country smoke-free.

The Australia sample was also slightly more likely to agree (82 percent vs. global average 80 percent) that a better conversation with smokers is needed to make cigarettes a thing of the past. Regarding regulations, a substantial 87 percent of those in Australia (vs. global average 83 percent) agree that smokers should have access to and accurate information about smoke-free alternatives; respondents there are also slightly more likely than average to agree (77 percent vs. global average 74 percent) that encouraging smokers to switch can complement other efforts to reduce smoking rates.

In view of the tight regulatory environment in Australia, it is interesting that people in that country are slightly more likely than the global average (70 percent vs. 68 percent) to support tobacco companies working with governments to improve access to and information about smoke-free products.

Sampling:

n=1,238, general population adults, 21–74 years of age, throughout Australia. A booster sample was used to secure n=355 adult smokers and n=103 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

Australian smoker status:

- 11 percent of respondents are current smokers.
- 4 percent are occasional smokers.
- 25 percent are former smokers.
- 60 percent are never smokers.

Switchers represent 5 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 7 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

**Brazil**

In Brazil, there is a high level of support for devoting government time and resources to efforts to lower smoking rates (87 percent vs. global average 81 percent). However, there is also above-average agreement (91 percent vs. 83 percent) that more regulation and taxation alone will not succeed in making the country smoke-free—a new conversation is needed to reduce smoking rates.

Smoke-free alternative products were not officially available in Brazil at the time of the survey, so it's not surprising that awareness of e-cigs in that market is slightly lower than the global average (84 percent vs. 90 percent), as is awareness of heated tobacco (37 percent vs. 41 percent). Rather, it might be considered surprising that awareness is so high in the absence of availability.



Adult-age smokers in Brazil are far more likely than average to say they would consider switching to smoke-free alternatives (85 percent vs. 68 percent) if they had more clarity on how these products differ from cigarettes; however, their motivations for doing so may be different from those in some other markets. Two out of three smokers in Brazil feel discriminated against as a result of their smoking. And in a culture that is seen as valuing attractiveness, nearly two-thirds of those in Brazil (65 percent) consider nonsmokers to be more attractive than smokers, far higher than the 51 percent of the global sample that say the same. People in Brazil also are more likely than average to have had arguments with loved ones over smoking. Far more smokers there say their smoking causes arguments with loved ones (62 percent vs. global average 36 percent), so it's no surprise that 37 percent of smokers hide their habit from loved ones (vs. global average 23 percent). These pressures may explain why 26 percent of nonsmokers in Brazil have considered breaking up with their smoker partner because they smoke (vs. global average 17 percent).

To some extent, the tensions around cigarette smoking may be resolved by the adoption of smoke-free alternatives. People in Brazil are more likely than average (68 percent vs. global average 57 percent) to prefer it when someone uses a smoke-free alternative during a meal compared with cigarettes. This aversion to cigarettes extends beyond the dinner table and applies to the entire home. People in Brazil (68 percent vs. global average 56 percent) would prefer visiting the homes of smoke-free users rather than the homes of smokers. Given these attitudes, it's not surprising that in Brazil far more switchers than average (75 percent vs. global average 48 percent) say they have experienced better relationships with family and friends since giving up cigarettes.

Sampling:

n=1,234, general population adults, 21–74 years of age, throughout Brazil. A booster sample was used to secure n=356 adult smokers and n=100 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

Brazil smoker status

- 10 percent of respondents are current smokers.
- 5 percent are occasional smokers.
- 17 percent are former smokers.
- 68 percent are never smokers.

Switchers represent 2 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 8 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

 **Denmark**

The survey shows a higher-than-average percentage of smokers in Denmark who feel discriminated against on account of their smoking (58 percent vs. global average 44 percent). People in this country are far less likely to deem it important for governments to dedicate time and resources to efforts to reduce smoking rates (64 percent vs. global average 81 percent) or to agree that more regulation and taxation alone will not succeed in making this country smoke-free and that a new conversation is needed to reduce smoking rates (70 percent vs. global average 83 percent).

Smokers in Denmark are far less likely to consider switching to smoke-free alternatives, even if they had more clarity on how they compare with



cigarettes (47 percent vs. 68 percent). Still, there are signs that increased awareness and access to accurate information might change attitudes among adult-age smokers. While far fewer smokers in this market admit to having had arguments with loved ones over their smoking (8 percent vs. global average 36 percent), there are plenty of switchers who say they are enjoying better relationships with friends and family (29 percent) and an improved social life (29 percent) since switching.

Sampling:

n=1,237, general population adults, 21–74 years of age, throughout Denmark. A booster sample was used to secure n=398 adult smokers and n=107 users of smoke-free alternative products.

Margin of error: ± 2.8

Denmark smoker status

- 14 percent of respondents are current smokers.
- 4 percent are occasional smokers.
- 21 percent are former smokers.
- 60 percent are never smokers.

Switchers represent 3 percent of the total sample. In Denmark, this group encompasses both former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products and current or occasional smokers who also use e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 8 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

Germany

As with their neighbors in Denmark, respondents in Germany are less supportive than average of new policies that aid smokers in their transition away from cigarettes. While people in Germany are more supportive than those in Denmark, they still fall below the global average in believing it is important for the government to dedicate time and resources to efforts to reduce smoking rates (70 percent vs. global average 81 percent). Similarly, many of the emotional triggers seem to be less impactful on the German public compared with the global average. People in Germany are less likely to cite smoking as a point of disagreement in relationships. Fewer smokers say their smoking causes arguments with loved ones (22 percent vs. global average 36 percent), and fewer nonsmoking partners claim to have arguments with their smoker partner over smoking (55 percent vs. global average 71 percent). In fact, only 6 percent of smokers' partners in Germany have considered leaving their partner because they smoke, which is three times less than the global average.

Sampling:

n=1,235, general population adults, 21–74 years of age, throughout Germany. A booster sample was used to secure n=355 adult smokers and n=100 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

Germany smoker status

- 17 percent of respondents are current smokers.
- 5 percent are occasional smokers.
- 31 percent are former smokers.
- 47 percent are never smokers.

Switchers represent 5 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or



heat-not-burn tobacco products. Smokers' partners represent 9 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

Hong Kong

Despite its proximity to some of the most developed markets for smoke-free alternatives, Hong Kong maintains restrictive regulations on the availability of these products. Smoke-free alternatives are proposed to be banned, and yet our survey reveals a surprising level of awareness. Although relatively fewer Hong Kong respondents have heard of e-cigs (71 percent vs. global average 90 percent), that's still a high number for a region where a ban has been proposed. Most notably, though, 62 percent had heard of heated tobacco products, well above the global average of 41 percent. Indeed, awareness of heated tobacco was the third highest among the places surveyed, beating out markets such as Germany (40 percent) and the U.K. (31 percent), where the products are readily available.

Such high levels of awareness may be explained by the attitudes toward smoking in such a densely populated city. Many smokers feel discriminated against (61 percent vs. global average 44 percent), so they may be searching for other options that enable them to reduce their impact on nonsmokers without giving up nicotine. However, these smokers are less likely to receive support from the broader community. People in Hong Kong are less apt than the global average (60 percent vs. 68 percent) to support providing smokers with information about and access to smoke-free alternatives, and more apt to oppose it (28 percent vs. global average 19 percent). Nevertheless, 74 percent of smokers in Hong Kong (vs. global average 68 percent) say they would be more likely to switch to smoke-free alternatives if they had clarity on how the products differ from cigarettes.

The societal pressure against smoking in Hong Kong is most evident when looking at the relationships of smokers. One in four smokers' partners (25 percent) has considered leaving their partner because they smoke, strikingly more than the global average (17 percent). Almost 60 percent of nonsmokers said they would break up with their partner if they started smoking, far higher than the global average (56 percent vs. 37 percent). This could be because people in Hong Kong are more likely than average to find nonsmokers more attractive (63 percent vs. global average 51 percent). It is no surprise that above-average numbers of Hong Kong respondents (37 percent vs. global average 23 percent) say they hide their smoking from loved ones or friends.

Nevertheless, hope remains for smokers looking for better alternatives. Among switchers, 70 percent say they now have better relationships, and 64 percent have experienced an improvement in their social life since switching.

It is clear that there is a lot of room for discussion and clarification around smoke-free products in Hong Kong. Despite the proposed bans, our survey shows a clear demand from smokers for alternatives.

Sampling:

n=1,260, general population adults, 21–74 years of age, throughout Hong Kong. A booster sample was used to secure n=440 adult smokers and n=125 users of smoke-free alternative products.

Margin of error: ±2.8

Hong Kong smoker status

- 8 percent of respondents are current smokers.
- 3 percent are occasional smokers.
- 16 percent are former smokers.
- 73 percent are never smokers.

Switchers represent 4 percent of the total sample. In Hong Kong, this group encompasses both former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products and current or



occasional smokers who also use e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 8 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

Israel

A vast majority (88 percent) of survey respondents in Israel agree that more regulation and taxation alone will not succeed in making the country smoke-free (vs. global average 83 percent). This is interesting in view of Israel's decision to tax heated tobacco products at the same rate as cigarettes. Awareness of heated tobacco products is among the lowest in the countries surveyed (28 percent vs. global average 41 percent) despite its availability for sale. Furthermore, just 25 percent agree that they have all the information they need about smoke-free alternatives, compared with the global average of 55 percent. This suggests an openness to science-based campaigns that advance understanding of how these products compare with continued smoking.

In terms of the social perceptions around smoking, the results from Israel remind us of those seen in Italy. Many nonsmokers in Israel (80 percent vs. global average 71 percent) have had arguments with their smoking partner over the habit, with 18 percent (vs. global average 17 percent) having considered breaking up as a result of their partner's smoking. Furthermore, 43 percent of nonsmokers say they would break up with their current partner if he or she were to start smoking (vs. global average 37 percent). Evidently then, there are clear emotional consequences to continued smoking.

Looking further into social norms, we can see how the importance of meals and hospitality affects attitudes toward cigarettes and smoke-free alternatives. Traditional Israeli meals can be long; thus, it is not surprising that 82 percent of people in Israel have had a meal interrupted by someone taking a smoke break (vs. global average 79 percent). These

interruptions are likely due to the fact that 89 percent of people in Israel (vs. global average 84 percent) say they are bothered when someone smokes while they are enjoying a meal. Hence, it would be impolite for a smoker not to step away from the table in order to smoke. We see a very different attitude toward smoke-free alternatives. Seventy percent of survey respondents in Israel prefer when someone uses a smoke-free alternative rather than a cigarette during a meal, with a further 54 percent saying that the use of smoke-free alternatives during meals does not bother them.

Sampling:

n=1,254, general population adults, 21–74 years of age, throughout Israel. A booster sample was used to secure n=438 adult smokers and n=115 users of smoke-free alternative products.

Margin of error: ± 2.8

Israel smoker status

- 10 percent of respondents are current smokers.
- 10 percent are occasional smokers.
- 17 percent are former smokers.
- 63 percent are never smokers.

Switchers represent 2 percent of the total sample. In Israel, this group encompasses both former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products and current or occasional smokers who also use e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 9 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

Italy

In contrast to their northern European neighbors, respondents in Italy appear strongly supportive of efforts to reduce cigarette smoking.



People there are more likely than average to consider it important that governments dedicate resources to reducing smoking rates (86 percent vs. global average 81 percent) and also support a new and better conversation with smokers. They are also more aware than most of their global peers of alternatives such as e-cigs (96 percent vs. global average 90 percent) and heat-not-burn products (47 percent vs. global average 41 percent). People in Italy are open to providing smokers with accurate information and access to smoke-free products and are very supportive of a collaboration between tobacco companies and regulators to achieve this.

Interestingly, nonsmokers with smoker partners in Italy are the most likely to have had disagreements with their partner over smoking (87 percent vs. global average 71 percent). However, these nonsmokers are no more likely than their global peers to have considered leaving their partner because of smoking (16 percent vs. global average 17 percent). So, while smoking is not a deal-breaker in relationships there, it creates a persistent tension that may exacerbate their decline. People in Italy are more likely than average to agree that smoke-free alternatives have less of an impact on smell, which appears to be a main source of smoking-related relationship stress.

We should also highlight perceptions toward smoking and meals in Italy. In the U.S., as an example, people are less likely than average (67 percent vs. global average 79 percent) to have had meals interrupted by smoking and thus are less likely to notice the benefits of smoke-free products in these situations. This stands in stark contrast to Italy, where 93 percent have had a meal interrupted by someone going outside to smoke. Furthermore, 88 percent in Italy say that people smoking near them during meals is bothersome. Six in 10 nonsmokers in Italy prefer the use of smoke-free alternatives during meals, with half saying that the use of such alternatives during meals is not bothersome. People in Italy take great pride in their cuisine, so it is significant that 84 percent of switchers there (vs. global average 67 percent) agreed that meals taste better since they switched to a smoke-free alternative.

Sampling:

n=1,233, general population adults, 21–74 years of age, throughout Italy. A booster sample was used to secure n=350 adult smokers and n=100 former adult smokers who have switched to a smoke-free alternative product. Margin of error: ±2.8

Italy smoker status

- 16 percent of respondents are current smokers.
- 5 percent are occasional smokers.
- 31 percent are former smokers.
- 48 percent are never smokers.

Switchers represent 4 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 9 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

 **Japan**

Heated tobacco products have been available in Japan since 2014, and their use has grown rapidly. The market for smoke-free alternatives is unique there in that nicotine-containing e-cigarettes are not readily available. Nevertheless, our survey revealed that awareness of e-cigarettes (90 percent, same as global average) is higher than that of heated tobacco (77 percent vs. global average 41 percent).

People in Japan are among the most likely to support tobacco companies working with governments and regulators to ensure smokers have access to and accurate information about smoke-free alternatives. This is supported by 77 percent of people in Japan (vs. global average 68 percent) and opposed by just 9 percent (vs. global average 19 percent).



Still, below-average numbers of respondents in this market agree that they have all the information they need about smoke-free alternatives (49 percent vs. global average 55 percent). This is in stark contrast to regional neighbor Hong Kong, where respondents are very confident about their knowledge of smoke-free products.

Respondents in Japan are sensitive to the social nuances around smoking. They are more likely than the global average (74 percent vs. 69 percent) to feel uncomfortable visiting smokers' houses. Additionally, 44 percent of nonsmokers in Japan (vs. global average 37 percent) say they would break up with their partner if he or she started smoking.

Sampling:

n=1,232, general population adults, 21–74 years of age, throughout Japan. A booster sample was used to secure n=350 adult smokers and n=102 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

Japan smoker status

- 16 percent of respondents are current smokers.
- 2 percent are occasional smokers.
- 16 percent are former smokers.
- 66 percent are never smokers.

Switchers represent 2 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 8 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

Mexico

Digging into the data from Mexico shows trends similar to those in Argentina and Brazil. These include a high level of support for government intervention to reduce smoking rates and for a new conversation to reduce smoking.

Interestingly, Mexico has a higher awareness of heated tobacco products than their neighbors (40 percent, close to the global average of 41 percent), despite the lack of product availability. It is clear that there is an inherent demand for smoke-free alternatives. People in Mexico overwhelmingly agree that smokers should have access to and accurate information about smoke-free alternatives (92 percent vs. global average 83 percent). They are also very open to encouraging adult smokers to switch to smoke-free alternatives as a complement to other efforts to reduce the societal harm of cigarette smoking (86 percent vs. global average 74 percent). A higher proportion of respondents in Mexico support tobacco companies working with governments and regulators to ensure access to and accurate information about smoke-free alternatives (79 percent vs. global average 68 percent). This is encouraging considering that 85 percent of smokers there (vs. global average 68 percent) say they would be more likely to switch if they had clarity on how smoke-free alternatives differ from cigarettes.

As is the case with their Latin American peers, the demand for alternatives in Mexico appears to come from the negative social perceptions around cigarette smoking. High numbers of nonsmokers in Mexico (77 percent vs. global average 74 percent) have had disagreements with a smoking partner over their habit. However, nonsmokers with smoker partners in Mexico are less likely than the global average to have considered breaking up as a result (12 percent vs. global average 17 percent). This suggests that the nonsmokers may remain with their smoking partner, but the habit continues to be a source of tension.



Similarly, as in Argentina and Brazil, people in Mexico are much more likely than average to prefer the use of smoke-free alternatives during meals instead of cigarettes. Almost 7 in 10 respondents in Mexico claim that the use of smoke-free alternatives during a meal does not bother them.

Lastly, we notice similar themes emerge around the improved social lives of switchers. Six in 10 switchers in Mexico claim to have better relationships since quitting cigarettes and almost half say their social life in general has improved.

Sampling:

n=1,236, general population adults, 21–74 years of age, throughout Mexico. A booster sample was used to secure n=350 adult smokers and n=101 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

Mexico smoker status

- 10 percent of respondents are current smokers.
- 9 percent are occasional smokers.
- 20 percent are former smokers.
- 61 percent are never smokers.

Switchers represent 3 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 10 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

Russia

Russia is in line with the global average in terms of believing it's important for the government to dedicate time and resources to reducing smoking rates (82 percent vs. global average 81 percent). Similarly, they are on par with the global sample in agreeing that more regulation and taxation alone will not succeed in making the country smoke-free so a new conversation is needed to reduce smoking rates (83 percent, same as global average) and that a better conversation with smokers is needed (78 percent vs. global average 80 percent).

Among the countries surveyed, Russia is among the most aware of smoke-free alternatives. Virtually all respondents in that market (97 percent) are aware of e-cigs (global average 90 percent), while 65 percent are aware of heat-not-burn (global average 41 percent), the second highest level behind Japan.

As we saw with Italy, very many nonsmokers with smoker partners in Russia have had disagreements with their smoking partners over the habit (82 percent vs. global average 71 percent), but they are not especially likely to break up as a result (15 percent vs. global average 17 percent).

Sampling:

n=1,232, general population adults, 21–74 years of age, throughout Russia. A booster sample was used to secure n=350 adult smokers and n=100 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8



Russian smoker status

- 29 percent of respondents are current smokers.
- 6 percent are occasional smokers.
- 32 percent are former smokers.
- 33 percent are never smokers.

Switchers represent 3 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 15 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

United Kingdom

In analyzing the results of this survey, it's striking how often the U.S. and U.K. responses track each other. These markets share many of the same degrees of agreement and disagreement regarding regulation and taxation, for instance.

However, U.K. respondents are more apt than those in the U.S. to deem it important for the government to dedicate time and resources to efforts to reduce smoking rates (81 percent vs. global average 81 percent vs. 74 percent U.S.). More than three-quarters of U.K. respondents (76 percent) agree that 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. This compares with agreement levels of 74 percent of the global sample and just 66 percent of those in the U.S.

Sampling:

n=1,240, general population adults, 21–74 years of age, throughout the U.K. A booster sample was used to secure n=351 adult smokers and n=106 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

U.K. smoker status

- 12 percent of respondents are current smokers.
- 5 percent are occasional smokers.
- 19 percent are former smokers.
- 64 percent are never smokers.

Switchers represent 4 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 5 percent of the total sample and are defined as former or never smokers who have a partner who smokes.

 **United States**

U.S. respondents are more likely than their global peers to experience societal shame around cigarette smoking, with smokers there being more likely to feel discriminated against (54 percent vs. global average 44 percent). U.S. smokers are also more likely to feel the negative effects of smoking on their personal lives. Nonsmokers in the U.S. are significantly more likely than those elsewhere to have considered leaving their smoking partner (32 percent vs. global average 17 percent) and to say they would break up with their partner if he or she were to start smoking (45 percent vs. global average 37 percent). Nonsmokers in the U.S. also are more likely to feel uncomfortable visiting the homes of smokers (74 percent vs. global average 69 percent), and U.S. smokers are more likely to feel



uncomfortable around nonsmokers (52 percent vs. global average 47 percent). Understandably, then, we see that smokers in this market are more likely than those in other nations to hide their habit from loved ones or friends (33 percent vs. global average 23 percent).

On the other hand, people in the U.S. have a very different relationship with mealtime smoking compared with the other nations surveyed. They are much less likely to have had a meal interrupted by someone leaving the table to smoke (33 percent vs. global average 58 percent). They are also less apt to say that the use of a smoke-free alternative during meals doesn't bother them compared with someone smoking a cigarette (35 percent vs. global average 47 percent). One possible explanation may be cultural in nature, with U.S. meals tending to be shorter than those in Mediterranean or Latin American nations. Hence, it would make sense that people in the U.S. are less likely to smoke during meals and thus their fellow diners are less likely to appreciate the benefits of smoke-free alternatives in such situations.

Furthermore, the themes of personal freedom and agency are more evident among U.S. respondents. For example, people in the U.S. are less likely to agree that encouraging smokers to switch can complement other efforts to reduce smoking rates (66 percent vs. global average 74 percent). They are less likely to deem it important for the government to dedicate time and resources to efforts to reduce smoking rates (74 percent vs. global average 81 percent). And they are less keen on companies working with governments to provide accurate information about smoke-free alternatives (61 percent vs. global average 68 percent).

Sampling:

n=1,238, general population adults, 21–74 years of age, throughout the United States. A booster sample was used to secure n=353 adult smokers and n=102 former adult smokers who have switched to a smoke-free alternative product.

Margin of error: ± 2.8

U.S. smoker status

- 11 percent of respondents are current smokers.
- 4 percent are occasional smokers.
- 19 percent are former smokers.
- 66 percent are never smokers.

Switchers represent 3 percent of the total sample and are defined as former smokers who are current or occasional users of e-cigarettes or heat-not-burn tobacco products. Smokers' partners represent 5 percent of the total sample and are defined as former or never smokers who have a partner who smokes.



Appendix 2: Availability of E-Cigarettes and Heat-Not-Burn by Country/Region (as of July 15, 2019)

	E-CIGARETTES	HEAT-NOT-BURN
ARGENTINA	NOT AVAILABLE	NOT AVAILABLE
AUSTRALIA	NOT AVAILABLE	NOT AVAILABLE
BRAZIL	NOT AVAILABLE	NOT AVAILABLE
DENMARK	AVAILABLE	AVAILABLE
GERMANY	AVAILABLE	AVAILABLE
HONG KONG	NOT AVAILABLE	NOT AVAILABLE
ISRAEL	AVAILABLE	AVAILABLE
ITALY	AVAILABLE	AVAILABLE
JAPAN	NOT AVAILABLE	AVAILABLE
MEXICO	NOT AVAILABLE	NOT AVAILABLE
RUSSIA	AVAILABLE	AVAILABLE
U.K.	AVAILABLE	AVAILABLE
U.S.	AVAILABLE	MINIMALLY AVAILABLE

As noted in the survey methodology on pages 9-10, we included a booster sample of switchers in each country/region surveyed as part of the overall sample framework (n=1,000 general population adults + booster samples to achieve n=350 legal-age smokers and n=100 switchers). Even though smoke-free products may not be commercialized in some markets (or allowed to be legally sold), there is still a user base, as they can gain access to the products by purchasing them when traveling abroad, having a traveling friend bring them back or by ordering them online in some places.

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UNSMOKE: CLEARING THE WAY FOR CHANGE