

WE ARE INNOVATION



INNOVATION UNDER FIRE:

**A Global Alert on the Misperception
Epidemic in Vaping Views**

1 Exploring Smokers' Views in an Extensive International Poll

This large-scale survey taps into the opinions of almost 27,000 smokers from 28 countries, focusing on their beliefs about the risks of vaping versus smoking.

2 74% of Smokers Worldwide Believe Vaping is as Harmful as Smoking

This significant majority highlights the challenges facing public health messaging in correcting misperceptions about vaping compared to traditional smoking methods.

3 Stifling Innovation: The Fear Factor in Smoking Alternatives

Countries like Brazil, the Netherlands, Slovenia and Kazakhstan see high levels of fear and misinformation, with over 80% considering vaping as or more harmful than tobacco.

4 The Impact of Misinformation on Safer Choices

Unfounded views about vaping prevent the embrace of innovative, safer alternatives, cutting off better quitting solutions for smokers.

5 Discovering Positive Views on Vaping Around the World

In countries such as Italy, Czech Republic, France, and the United Kingdom, vaping is relatively perceived as less harmful than traditional smoking.



RESULTS

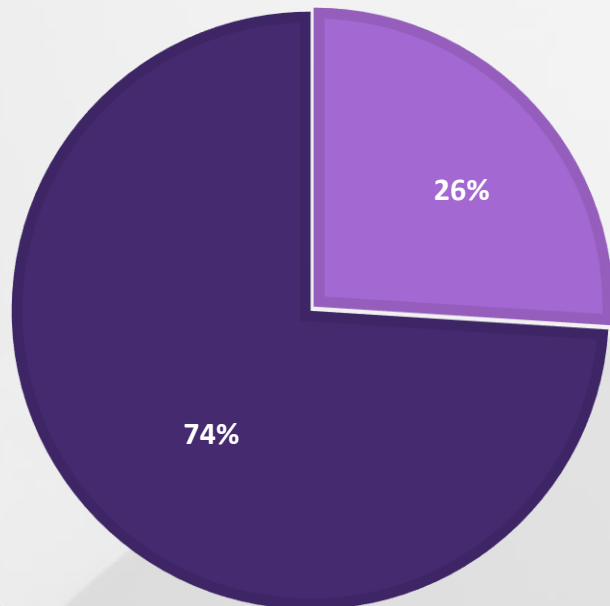
WHAT SMOKERS IN THE WORLD THINK ABOUT VAPING



Three quarters of smokers in the world believe that vaping is at least as harmful as smoking.

Vaping: more, equally or less harmful compared to smoking?

■ Less harmful than smoking ■ At least as harmful as smoking



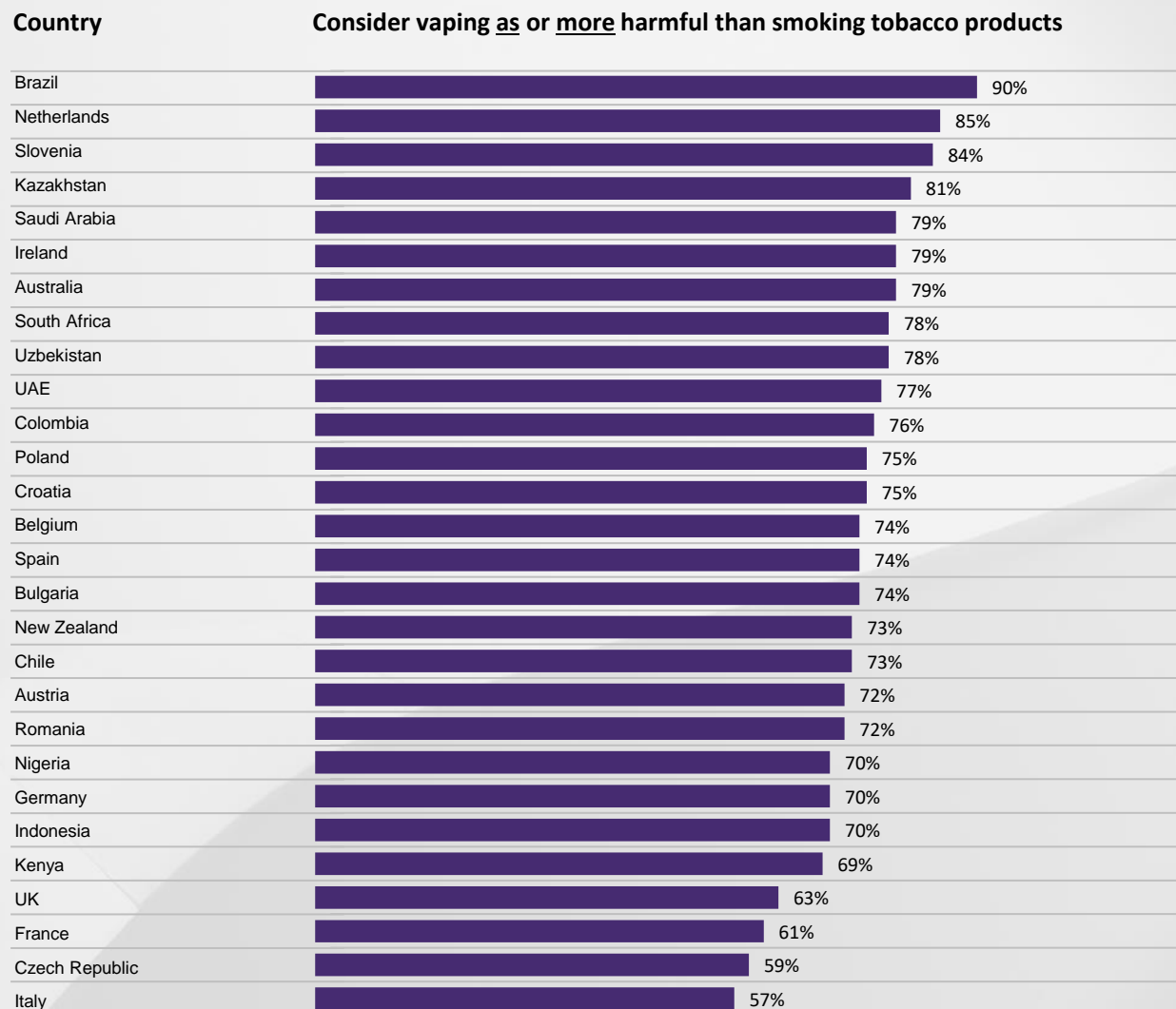
Base: 26,950 tobacco smokers across 28 countries

VAPING VS TOBACCO – AS/MORE HARMFUL

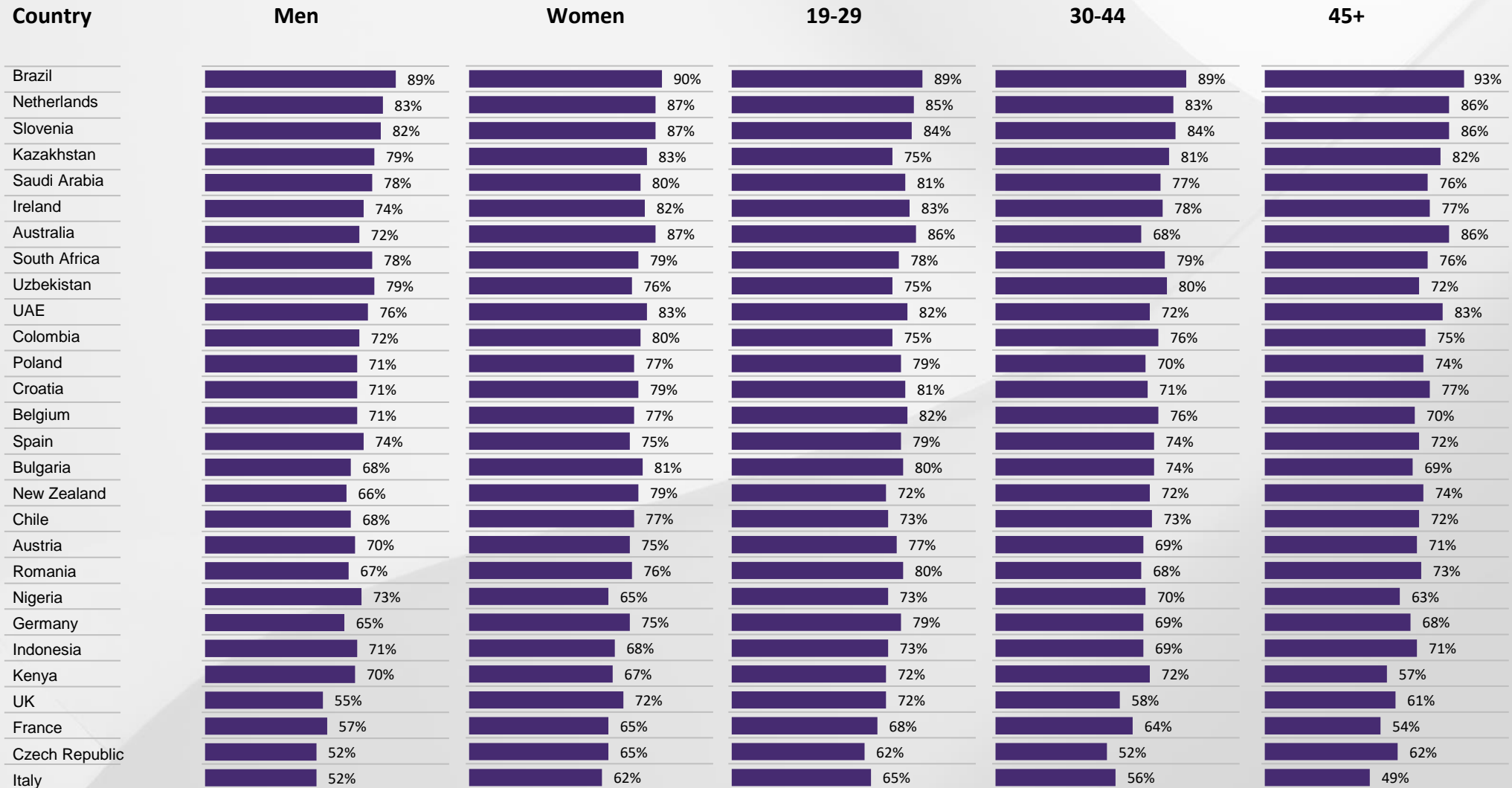


More than half of the respondents across all markets perceive vaping as equally or more harmful compared to smoking tobacco products.

In Brazil, Netherlands, Slovenia and Kazakhstan – more than 80% share this view.



CONSIDER VAPING AS OR MORE HARMFUL THAN SMOKING TOBACCO PRODUCTS

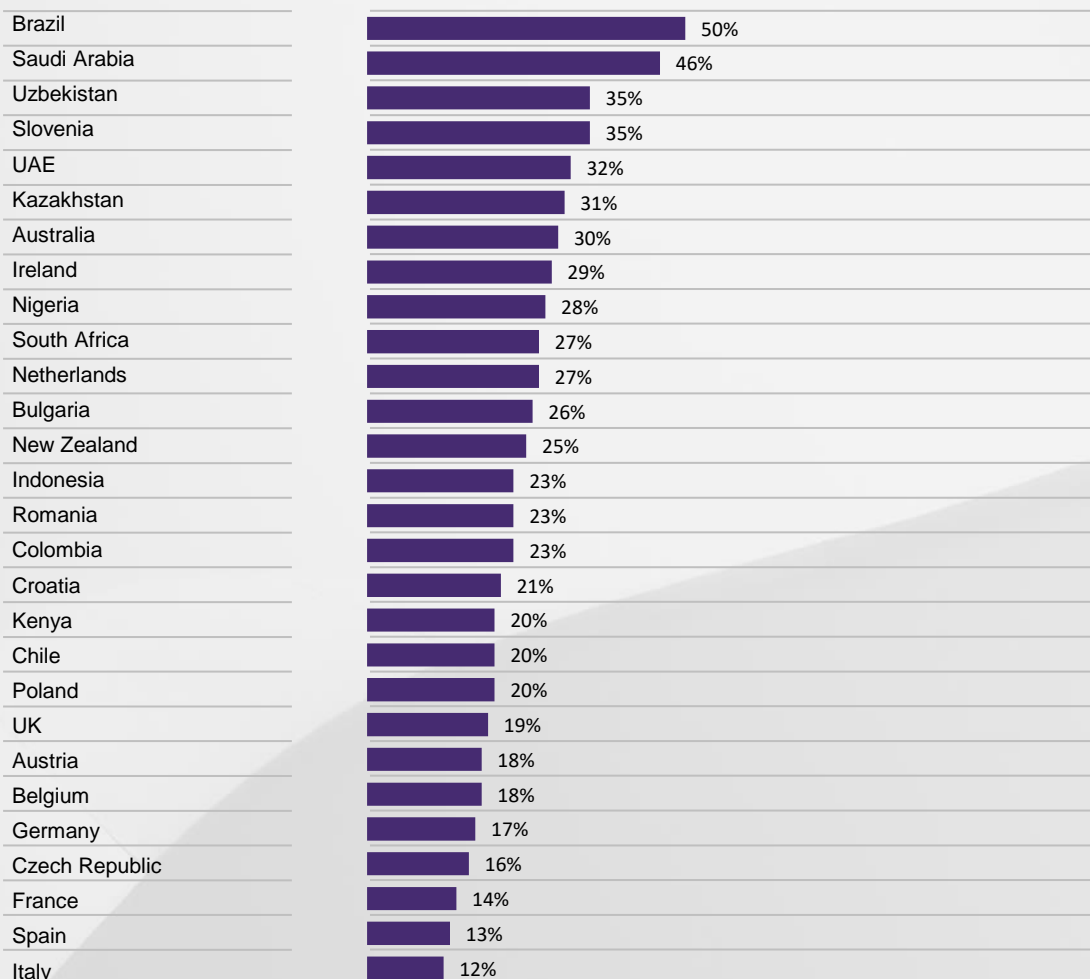


VAPING VS TOBACCO – MORE HARMFUL

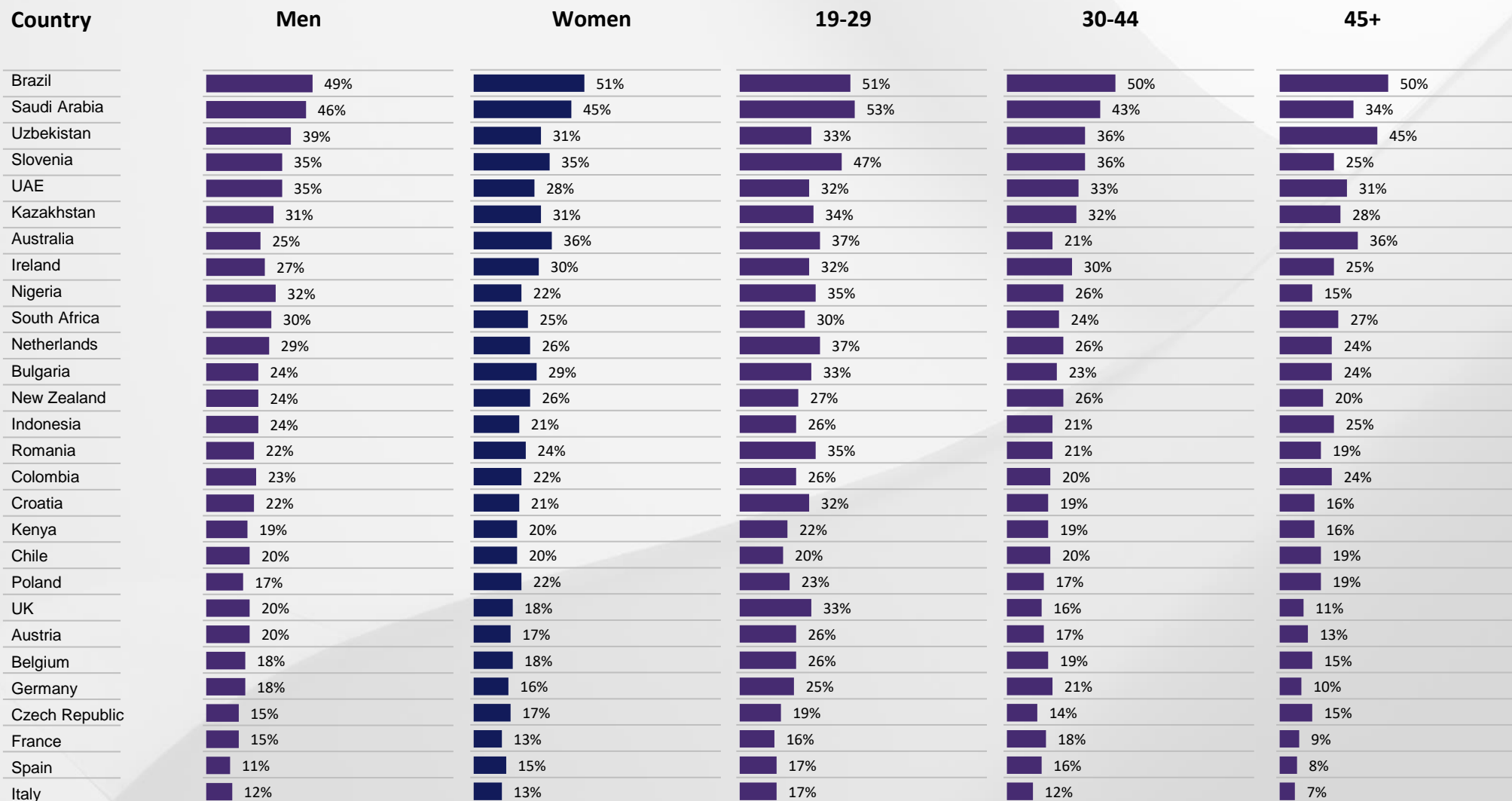


Brazil, Saudi Arabia, Uzbekistan and Slovenia stand out as the market with largest share of people who considers vaping as more harmful than tobacco products. Here, more than 1 in 3 agrees with this statement.

Country Consider vaping more harmful than smoking tobacco products



CONSIDER VAPING MORE HARMFUL THAN SMOKING TOBACCO PRODUCTS



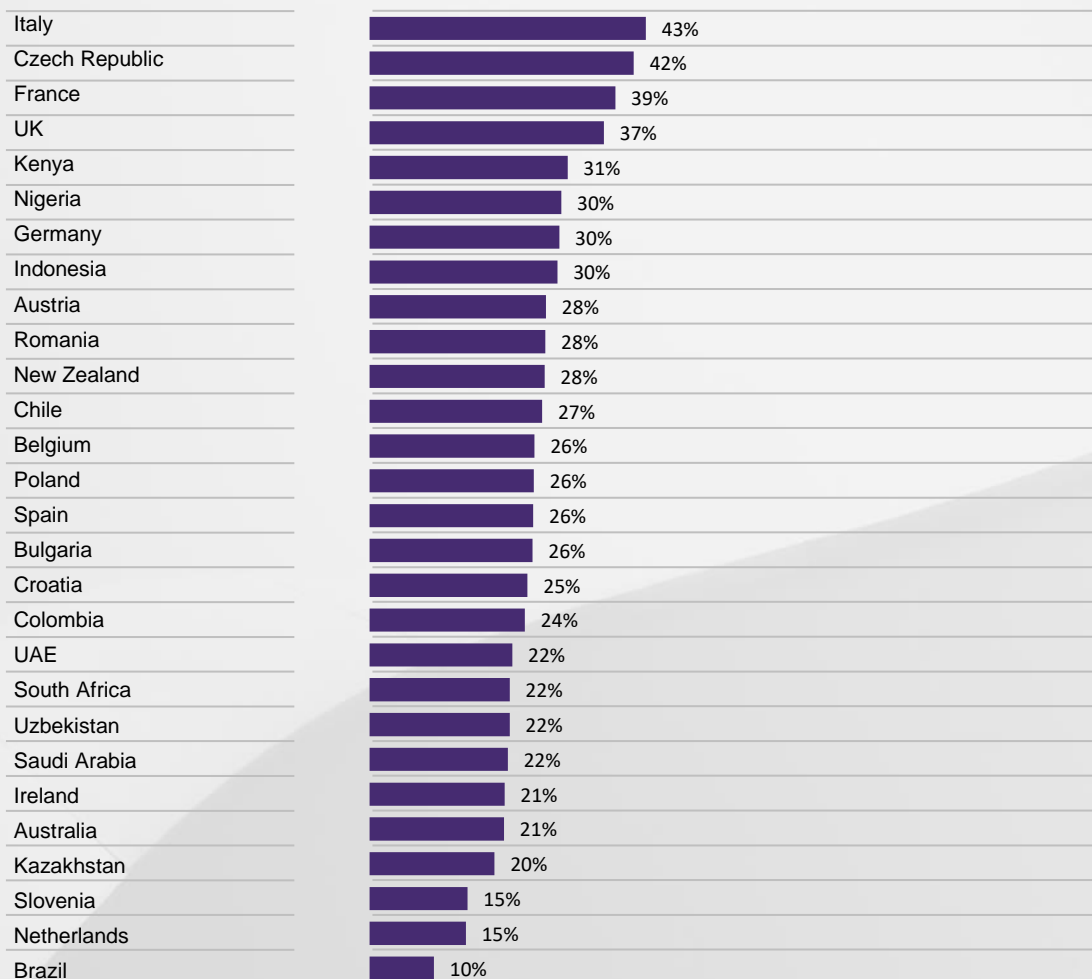
VAPING VS TOBACCO – LESS HARMFUL



The perception of vaping as less harmful than smoking tobacco products is strongest in Italy, Czech Republic, France and UK.

In Brazil, Netherlands and Slovenia – less than 20% agrees with the statement.

Country Consider vaping less harmful than smoking tobacco products





METHOD

Quantitative study in Ipsos panels



TARGET GROUP

- Tobacco users
- Age: 19+



QUESTIONS

How often do you currently use any or all of the following products?

- Ready-made cigarettes
- Self-rolled or self-tubed cigarettes
- Pipe
- Cigarillos or Cigars

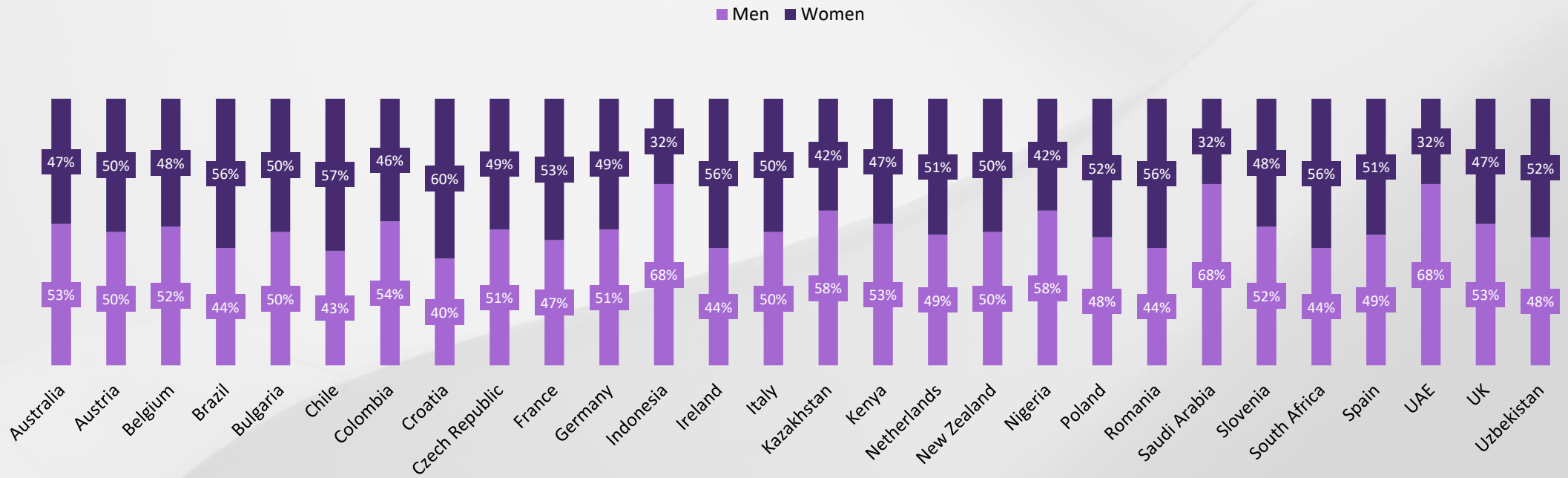
Which of the following best describes your opinion when it comes to vaping compared to smoking tobacco products?

- Vaping is more harmful than smoking tobacco products
- Vaping and smoking tobacco products are equally harmful
- Vaping is less harmful than smoking tobacco products

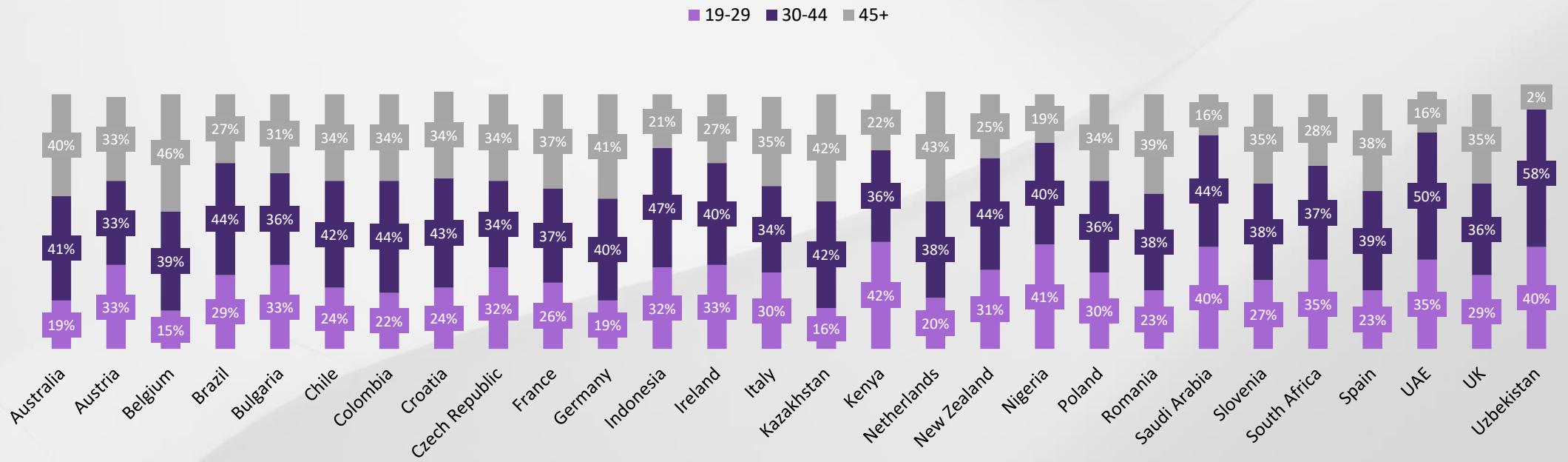
SAMPLE PER MARKETS

- Australia – 1000
- Austria – 1000
- Belgium – 1000
- Brazil – 1000
- Bulgaria – 1000
- Chile – 1000
- Colombia – 1000
- Croatia – 1000
- Czech Republic – 1000
- France – 1000
- Germany – 1000
- Indonesia – 1000
- Ireland – 1000
- Italy – 1000
- Kazakhstan – 450
- Kenya – 1000
- Netherlands – 1000
- New Zealand – 1000
- Nigeria – 1000
- Poland – 1000
- Romania – 1000
- Saudi Arabia – 1000
- Slovenia – 1000
- South Africa – 1000
- Spain – 1000
- UAE – 1000
- UK – 1000
- Uzbekistan – 500

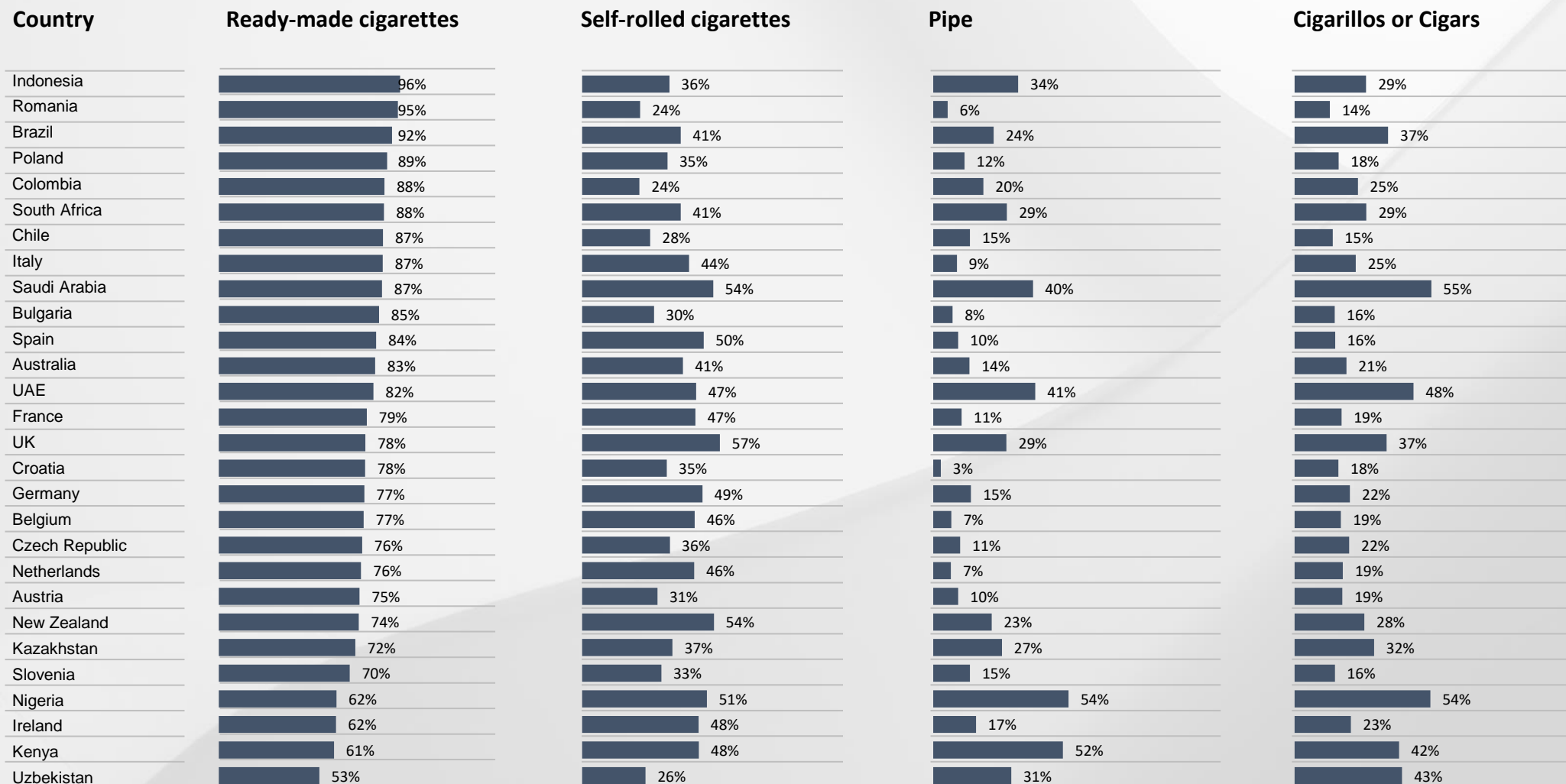
DEMOGRAPHIC PROFILE: GENDER



DEMOGRAPHIC PROFILE: AGE



WEEKLY USAGE PER TOBACCO TYPE (AMONG TOBACCO USERS)



ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.

ABOUT WE ARE INNOVATION



We Are Innovation is a dynamic network of individuals and institutions who fervently believe in the power of innovation to drive progress and solve the world's most pressing problems. With a global presence encompassing over 40 think tanks, foundations, and NGOs, We Are Innovation represents the diverse voices of a global civil society committed to advancing human creativity, embracing new technologies, and promoting innovative solutions.

Through our collaborative approach and cutting-edge expertise, we are spearheading transformative change on a global scale.

To learn more about our work, visit us at <https://weareinnovation.global/>