

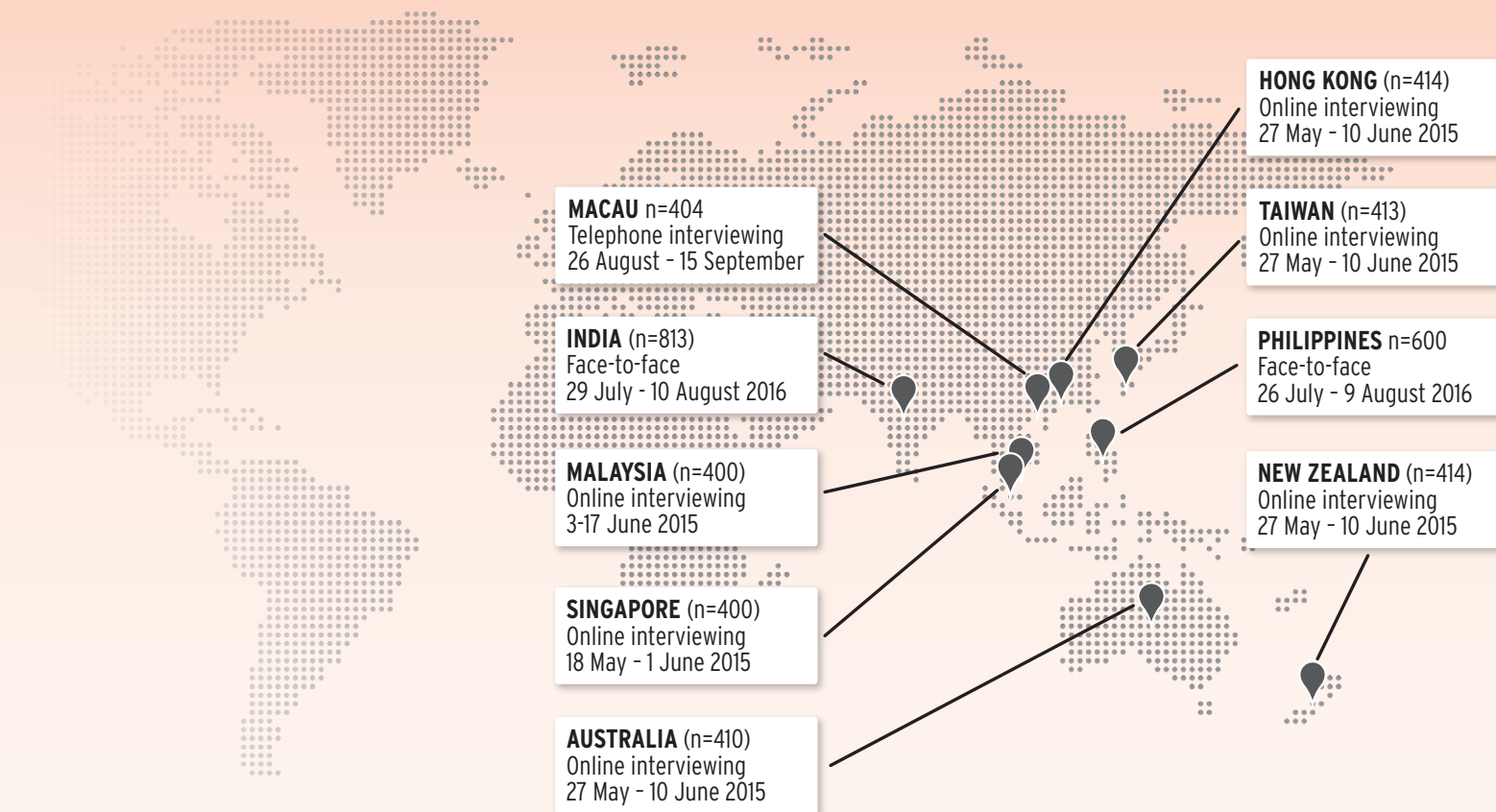
ASIA: ADULT SMOKER SURVEY RESULTS

RESEARCH
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NOVEMBER 2016

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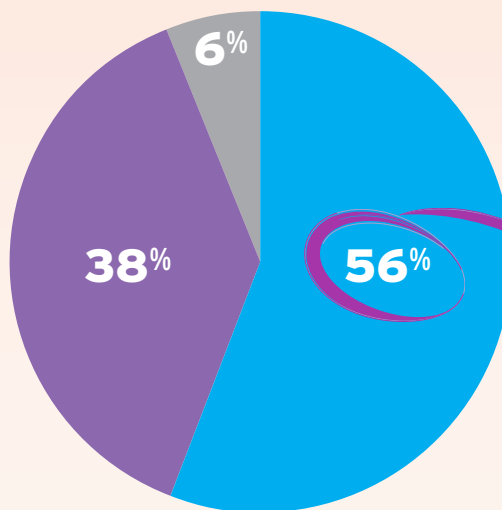
METHODOLOGY - 9 COUNTRIES, 4,200+ SMOKERS



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SMOKER AWARENESS OF E-CIGARETTES VARIES WIDELY BY COUNTRY

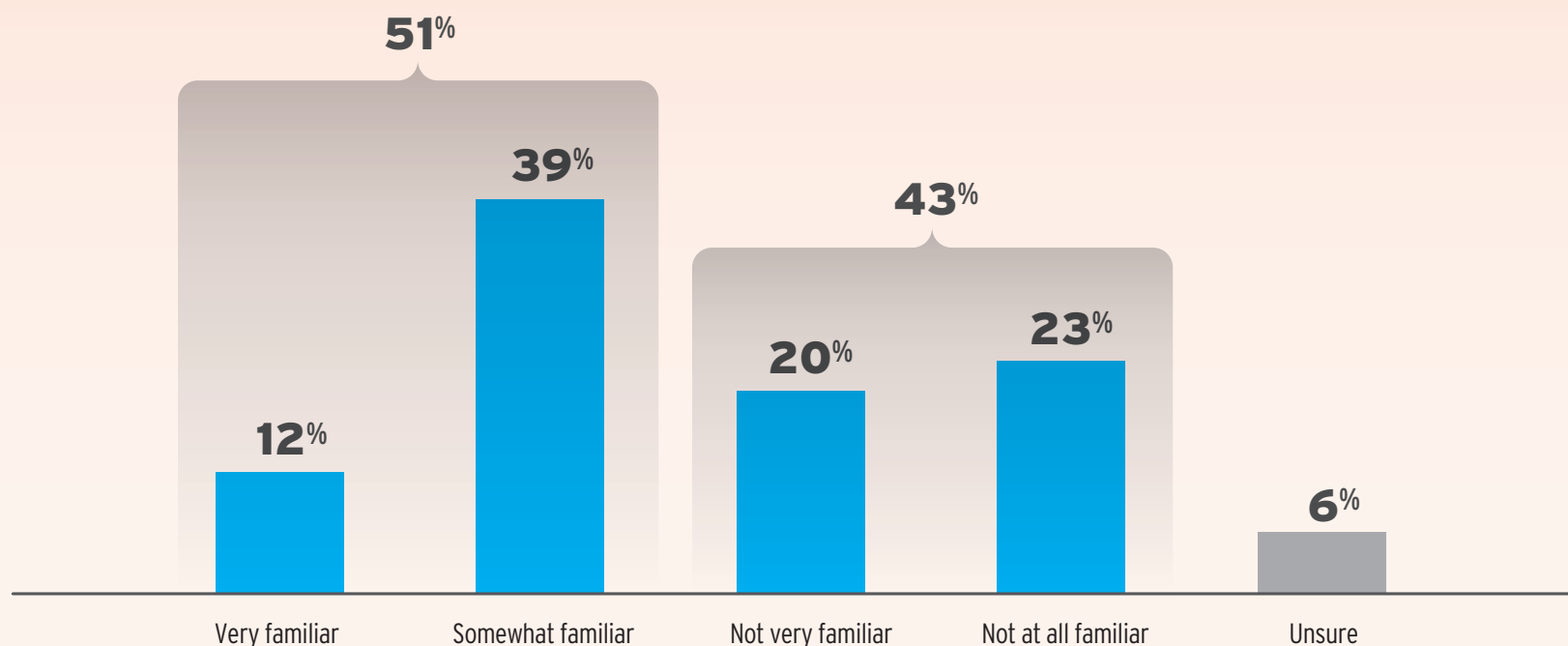
■ Yes
■ No
■ Unsure



- Malaysia: 95%
- Hong Kong: 89%
- Singapore: 79%
- New Zealand: 72%
- Taiwan: 70%
- Philippines: 66%
- Australia: 61%
- Macau: 52%
- India: 19%

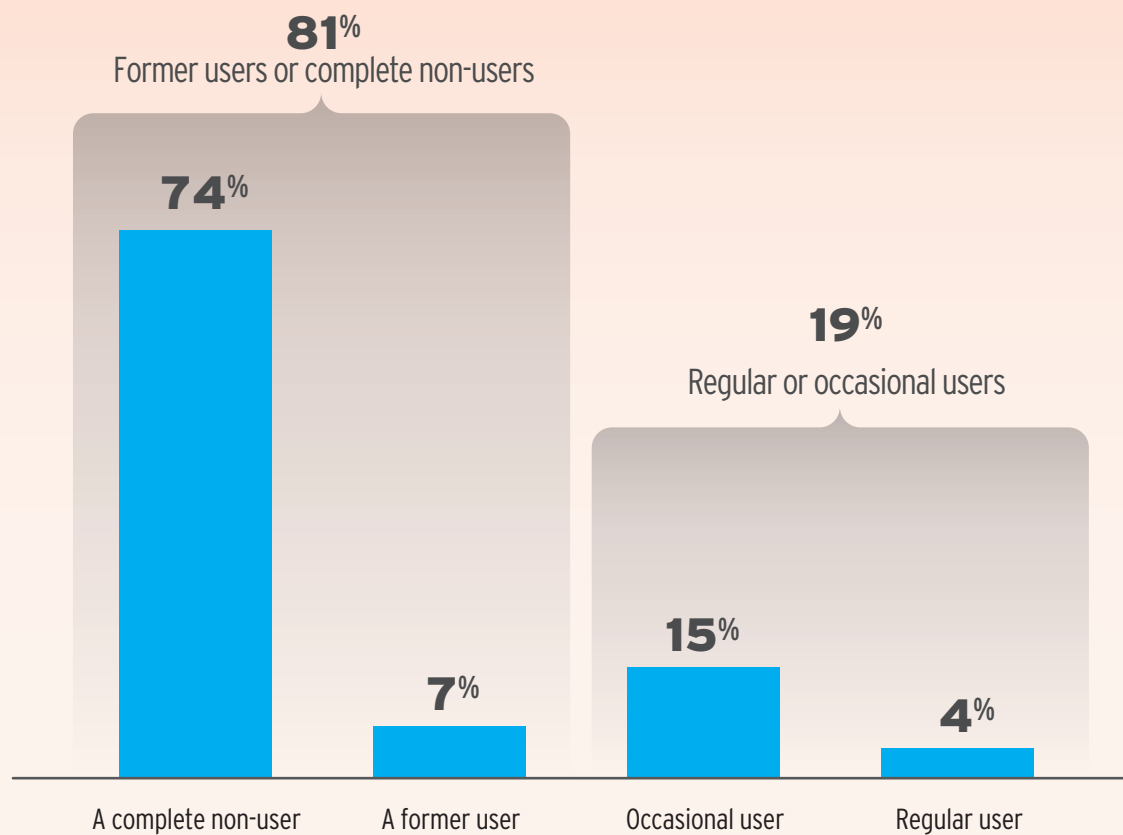
Q: Have you recently seen, read, or heard anything about e-cigarettes?

SMOKERS REMAIN CONFUSED ABOUT E-CIGARETTES WITH ONLY 12% BEING VERY FAMILIAR



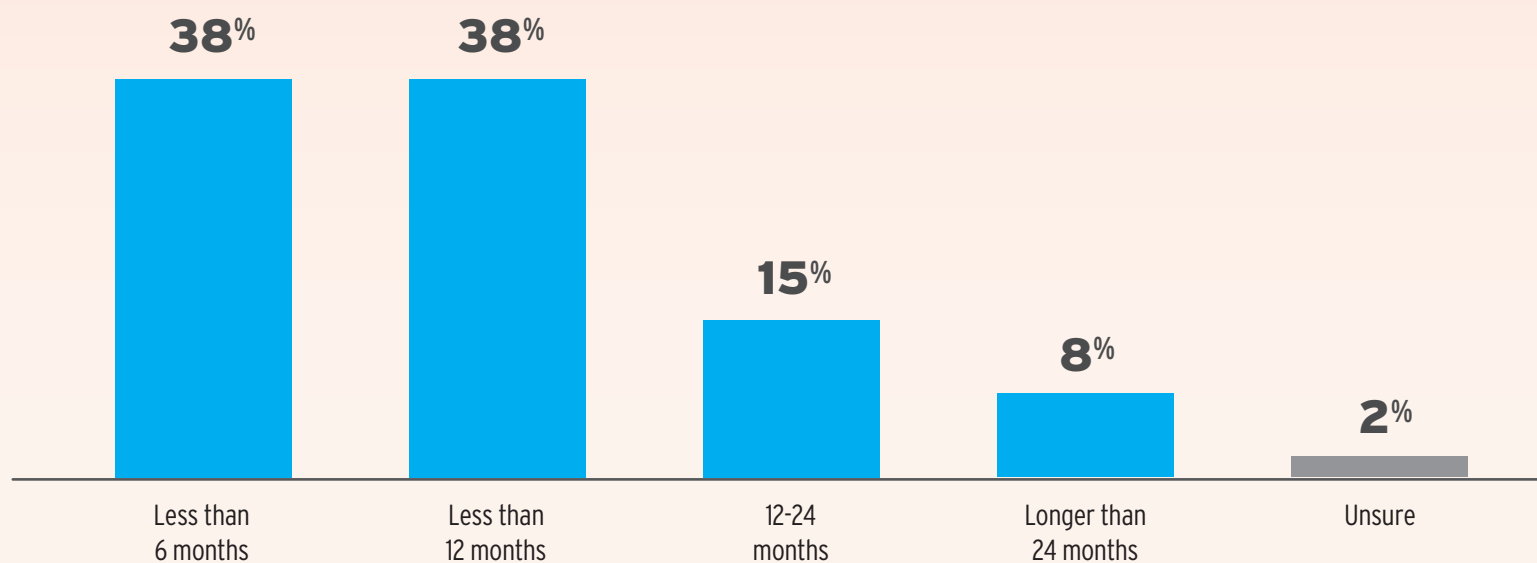
Q: Regardless of whether you have recently seen, read, or heard, something about e-cigarettes, how familiar would you say you are with e-cigarettes?

MOST E-CIGARETTE USERS USE THEM EXCLUSIVELY



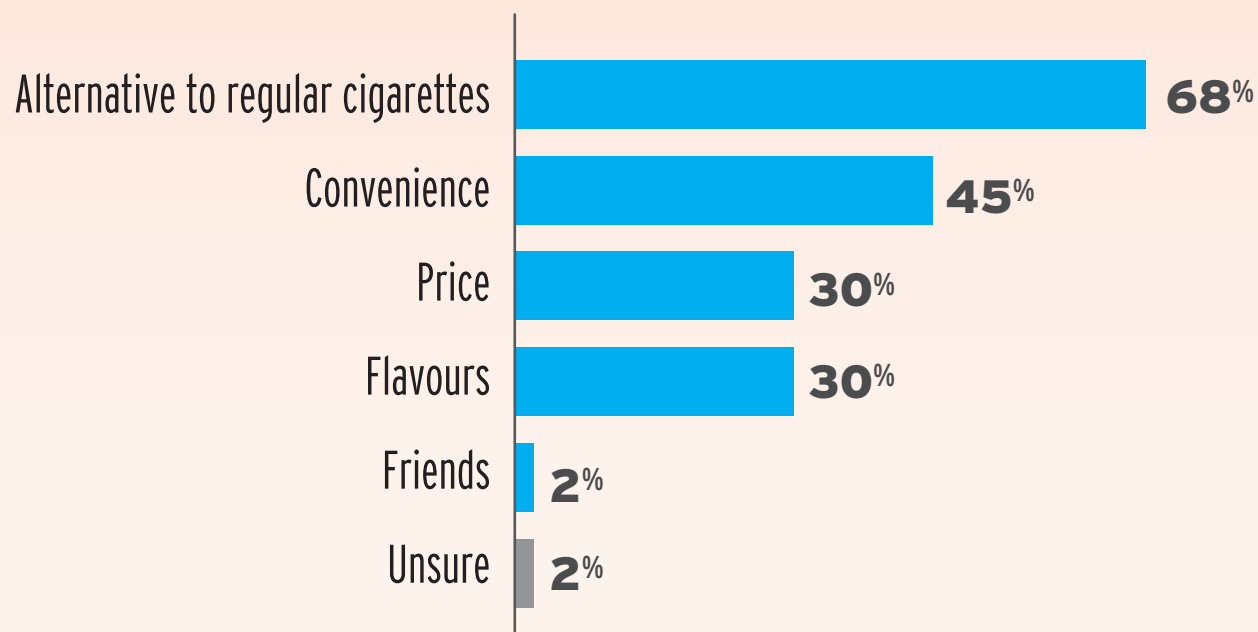
Q: And, for each of the following products [e-cigarettes], please indicate whether you are a regular user, an occasional user, a former user, or a complete non-user.

MOST HAVE USED E-CIGARETTES LESS THAN A YEAR



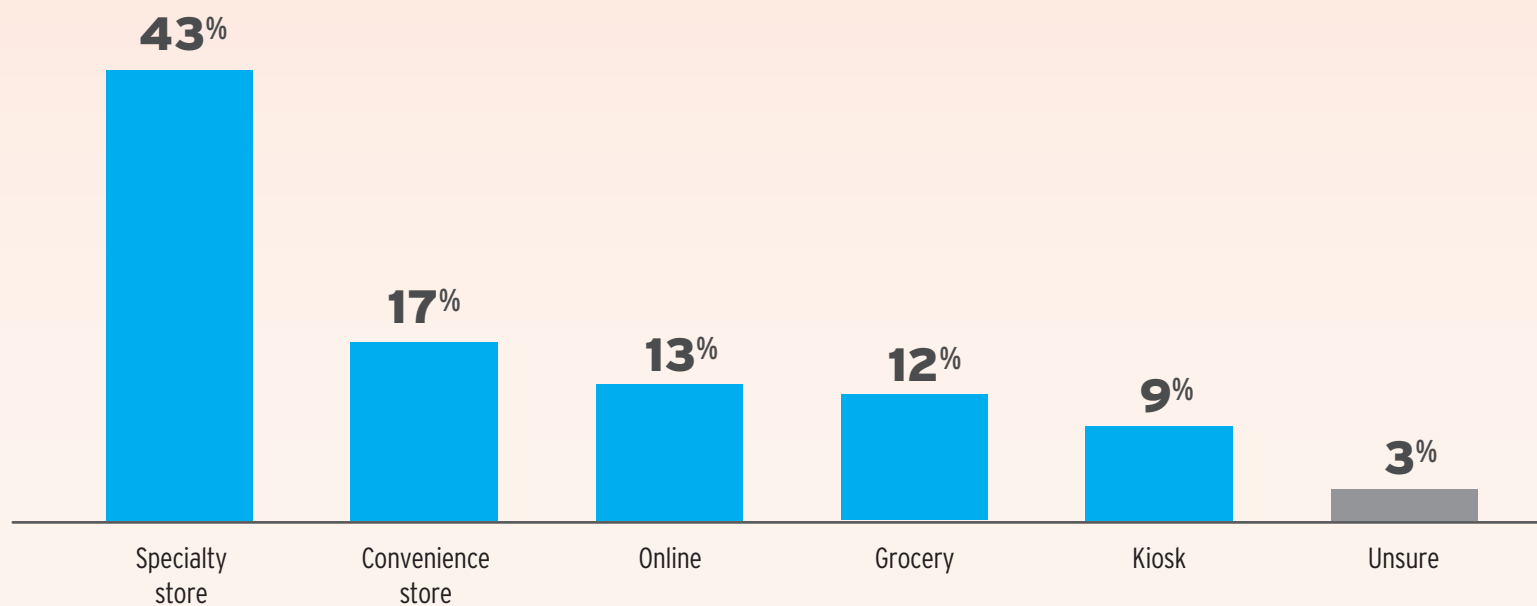
Q: How long have you used e-cigarettes? (N=949)

A MAJORITY STARTED USING E-CIGARETTES AS AN ALTERNATIVE TO REGULAR CIGARETTES



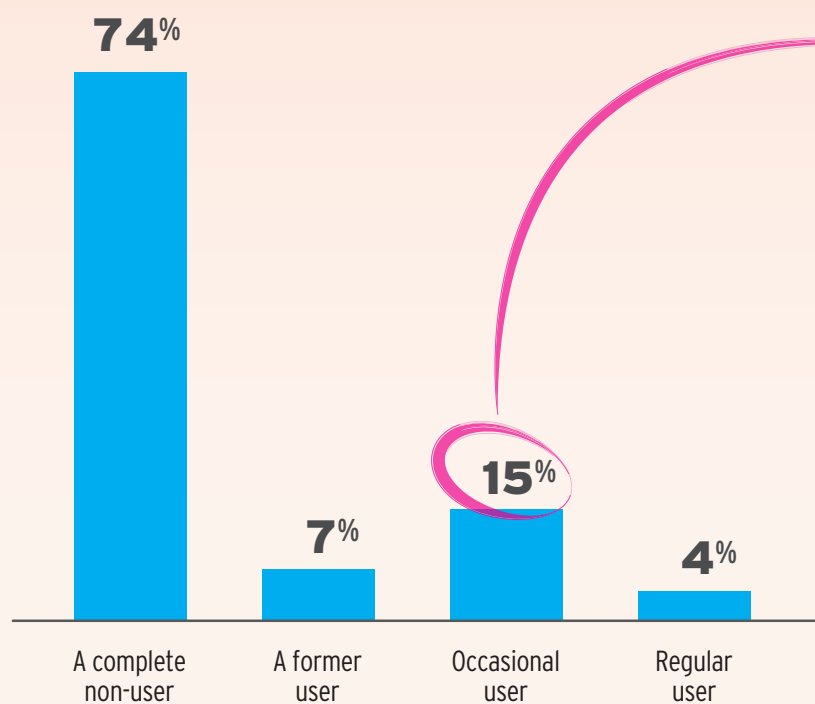
Q: Why did you start using e-cigarettes? (N=949)

E-CIGARETTES ARE PRIMARILY BOUGHT AT SPECIALTY STORES

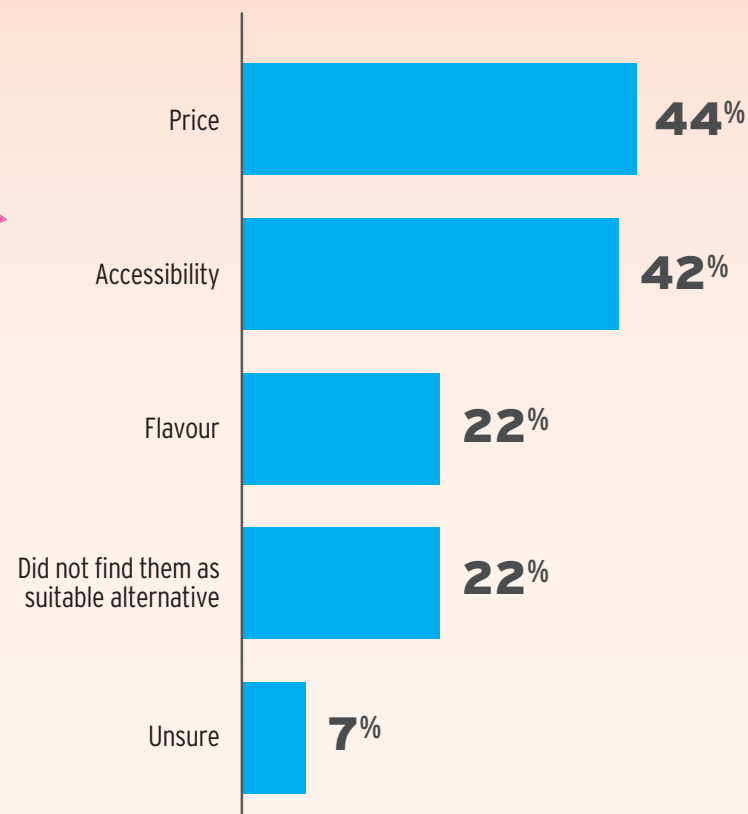


Q: Where do you predominately buy your e-cigarettes? (N=949)

BARRIERS TO USAGE OF E-CIGARETTES



Q: And, for each of the following products [e-cigarettes], please indicate whether you are a regular user, an occasional user, a former user, or a complete non-user.

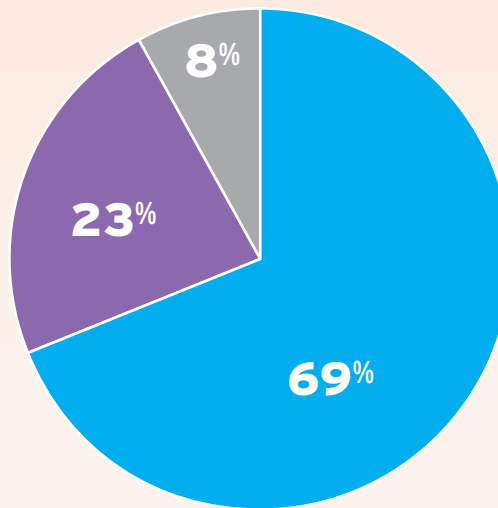


Q: What has kept you from using e-cigarettes more? Asked of the N=727 occasional users

E-CIGARETTES ARE SEEN AS A POSITIVE ALTERNATIVE

E-cigarettes represent a positive alternative to today's conventional cigarettes.

■ Agree
■ Disagree
■ Unsure

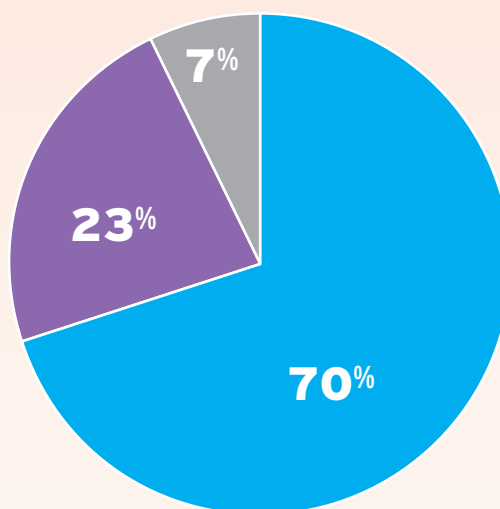


Q: For each of the following, please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. E-cigarettes represent a positive alternative to today's conventional cigarettes.

MOST ADULT SMOKERS WOULD CONSIDER SWITCHING

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

■ Agree
■ Disagree
■ Unsure

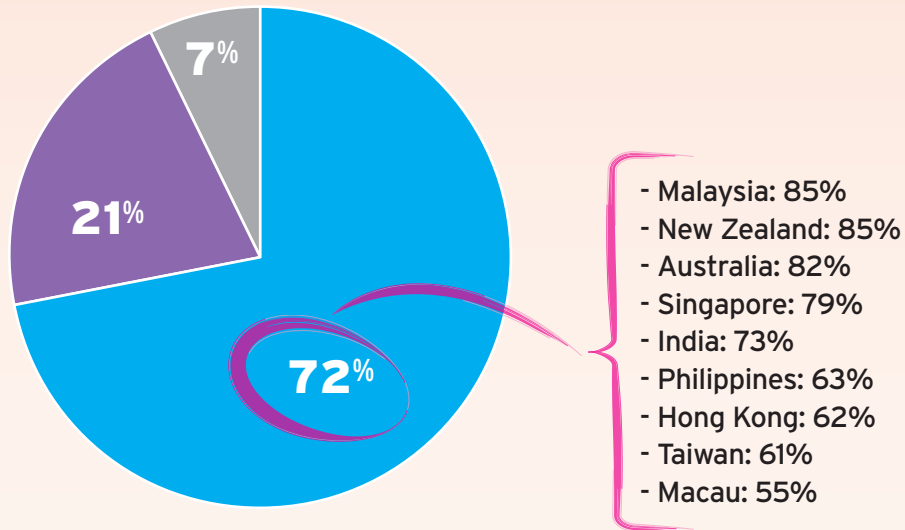


Q: For each of the following, please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. I would consider switching to e-cigarettes if they were legal, met quality and safety standards, and were conveniently available like regular tobacco products.

MOST AGREE GOVERNMENTS WOULD BE WRONG TO IMPEDE AVAILABILITY

It would be wrong for the Government to prevent or delay the introduction of less harmful alternatives to cigarettes for adult smokers.

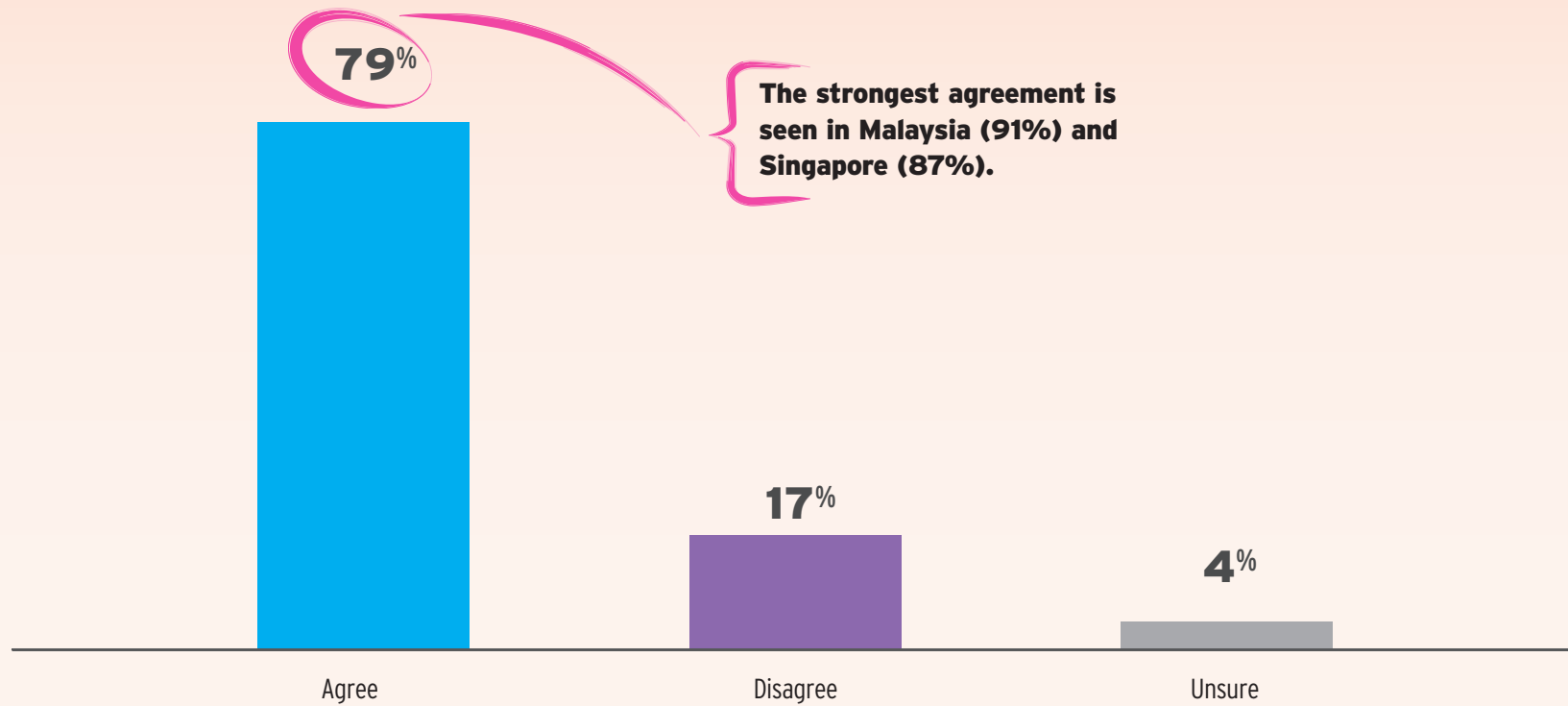
■ Agree
■ Disagree
■ Unsure



Q: Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statement: It would be wrong for the Government to prevent or delay the introduction of less harmful alternatives to cigarettes for adult smokers.

MOST AGREE GOVERNMENTS SHOULD ENCOURAGE A SWITCH

Through tax and regulatory policies, the Government should encourage adult smokers to switch to less harmful alternatives to cigarettes and ensure they are not used by youth.

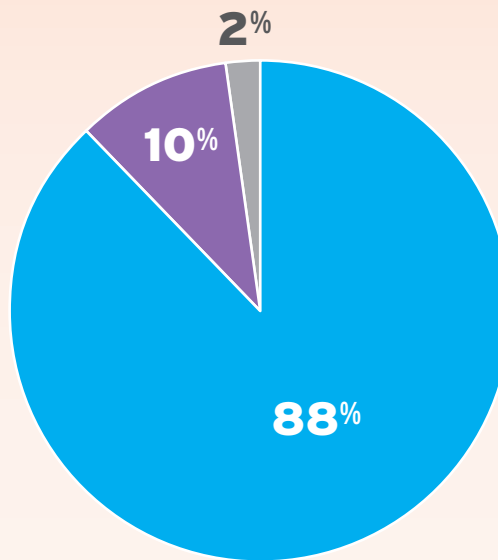


Q: Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statement: Through tax and regulatory policies, the Government should encourage adult smokers to switch to less harmful alternatives to cigarettes and ensure they are not used by youth.

A LARGE MAJORITY SAY THEY SHOULD HAVE THE RIGHT TO INFORMATION

If a new product is scientifically proven to have the potential to reduce the risk of smoking as compared to conventional cigarettes, adult smokers should have the right to access this information.

■ Agree
■ Disagree
■ Unsure



Q: Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statement: If a new product is scientifically proven to have the potential to reduce the risk of smoking as compared to conventional cigarettes, adult smokers should have the right to access this information.

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