

The Household Case for Innovation: A Five-Country Survey on Smoking Cessation, and Quality of Life

We Are Innovation

May 2026

Study Overview

This study sought to measure the perspectives of individuals who live with or are close to former smokers about the cessation of smoking traditional cigarettes and transition to innovative nicotine products (INP) – such as heated tobacco products, vapes, and nicotine pouches – in different countries.

The study was conducted in North America (USA, Canada), Europe (France, UK), and Asia (Japan).

Primary Study Objectives

Cessation Details

Objective: Assess details on how cigarette smokers were quitting.

Perceived Health and Lifestyle Changes

Objective: Understand how those close to people quitting cigarettes - especially through the help of innovative nicotine products (INP) - perceive health and lifestyle changes by former smokers.

Changes in Quality of Life

Objective: Understand how quitting cigarettes impacts quality of life of others close to the smokers.

Sentiment towards INP

Objective: Measure the sentiment towards INP by those close to people quitting cigarettes.

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and Lifestyle
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Quality of Life

6 Sentiment
towards INP

Key Takeaways

Executive Summary

In April 2026, Ipsos surveyed the perspectives of over 4,000 individuals across five countries on three continents (USA, Canada, UK, France, and Japan) who live with or are close to former smokers.

The research focused on understanding how the transition from traditional cigarettes to Innovative Nicotine Products (INP) – including heated tobacco products, vapes, and nicotine pouches – impacts not only the former smokers but also their loved ones.

- INP are a meaningful tool in helping smokers quit traditional cigarettes. E-cigarettes were the most commonly used INP to help quit smoking in the European and North American countries studied, while heated tobacco products dominated in Japan
- Friends and family members reported noticeably greater positive changes when their loved ones used INP to quit smoking
- Those who used INP to quit demonstrated markedly improved emotional well-being compared to those who quit without INP, according to friends and family
- The study reveals that INP usage during cessation was associated with positive outcomes for entire households and social networks
- There is overwhelming support for adult smokers' rights to access INP by those who witnessed someone quitting cigarette smoking
- When friends or relatives witnessed INP being used for cessation, efficacy perceptions dramatically increased
- A majority of respondents, particularly those with experience of someone else using them, state that INP are significantly safer than traditional cigarettes
- Those who witnessed a friend or relative quit using INP strongly endorse their effectiveness

Methodology

Methodology

Field Dates and Mode

- Survey fielded from April 10-17, 2026.
- Data collected through an online survey.
- Dimensions was the survey authoring tool used by Ipsos to program the survey instrument.

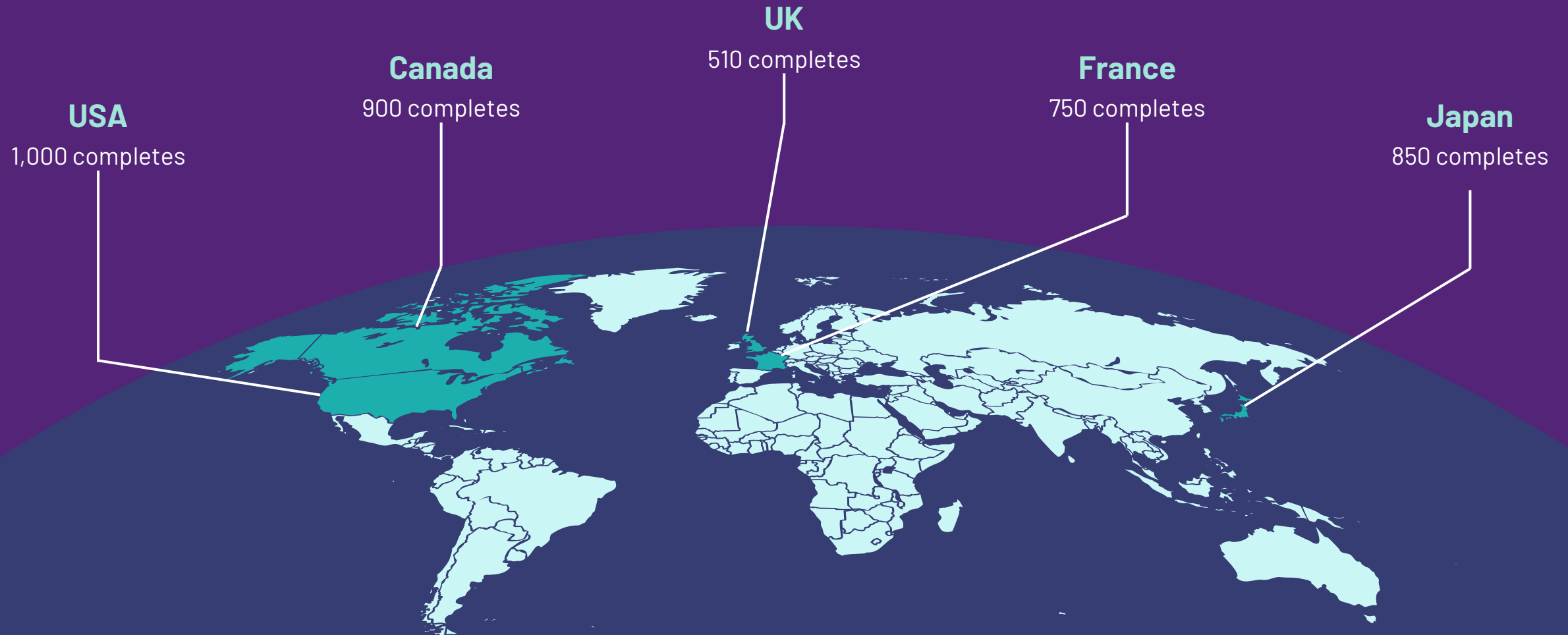
Sample Source & Size

- The sample was sourced online from Ipsos and partner vendor opt-in research panels.
- The final sample size at the conclusion of the study was:
 - USA: 1,000
 - Canada: 900
 - France: 750
 - UK: 510
 - Japan: 850

Respondent Criteria

- Age 18+
- Know someone who used to smoke cigarettes regularly and stopped in the last 5 years; the friend or relative who stopped in the last 5 years could have restarted smoking after a couple of months.

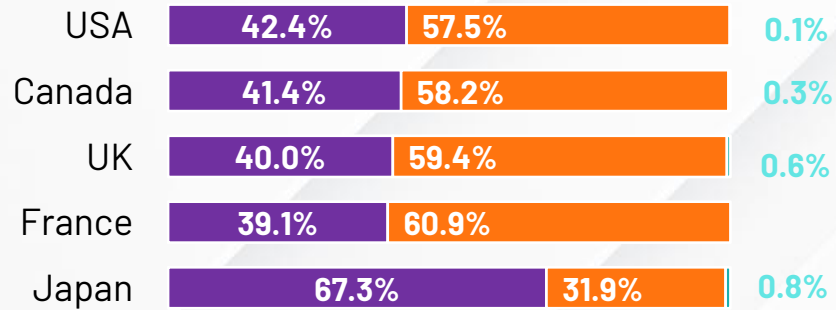
Global Country Map Call Out



Sample Profile: Core Demos

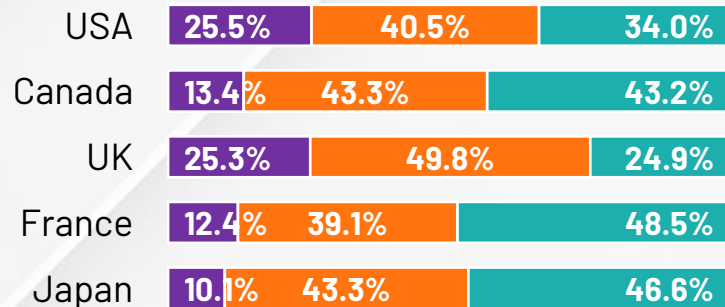
Gender

■ Male ■ Female ■ Other



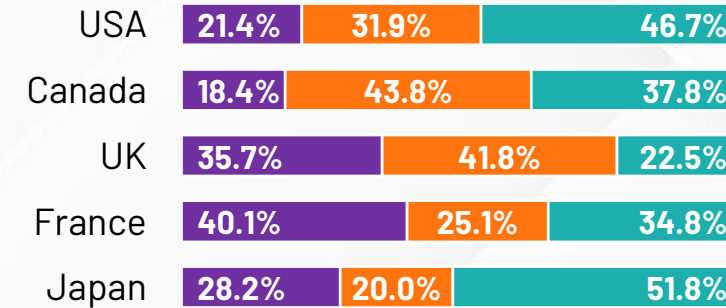
Age

■ 18-34 ■ 35-54 ■ 55+



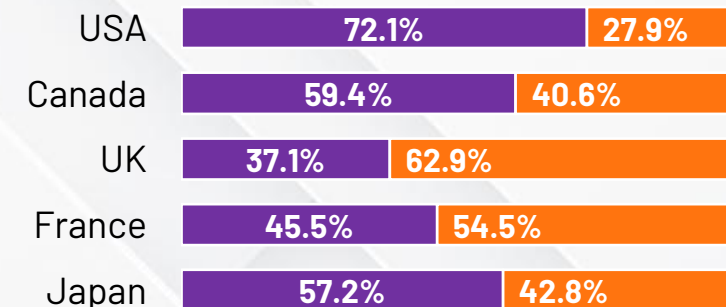
Education

■ No college ■ Some college ■ College+



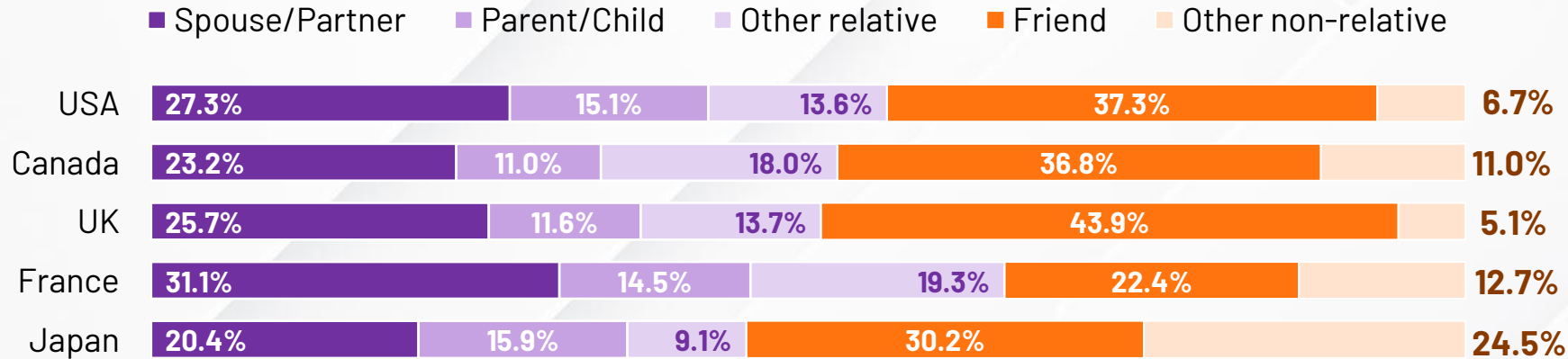
Income

■ Below median ■ Above median

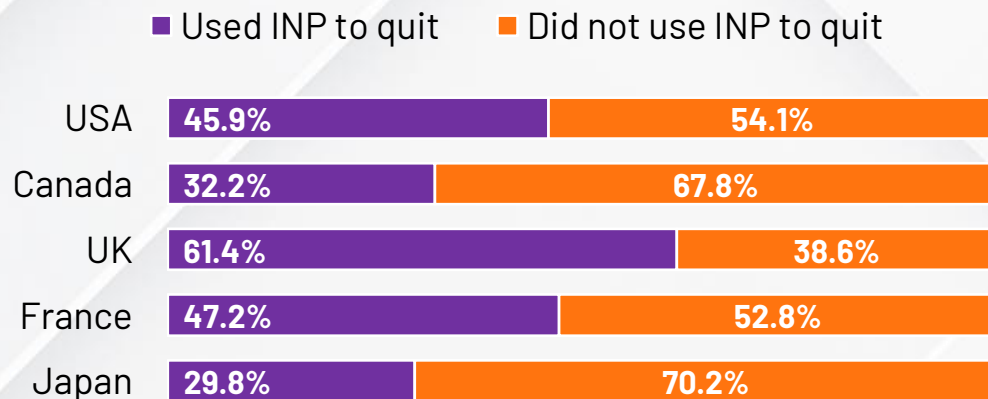


Sample Profile: Study Demos

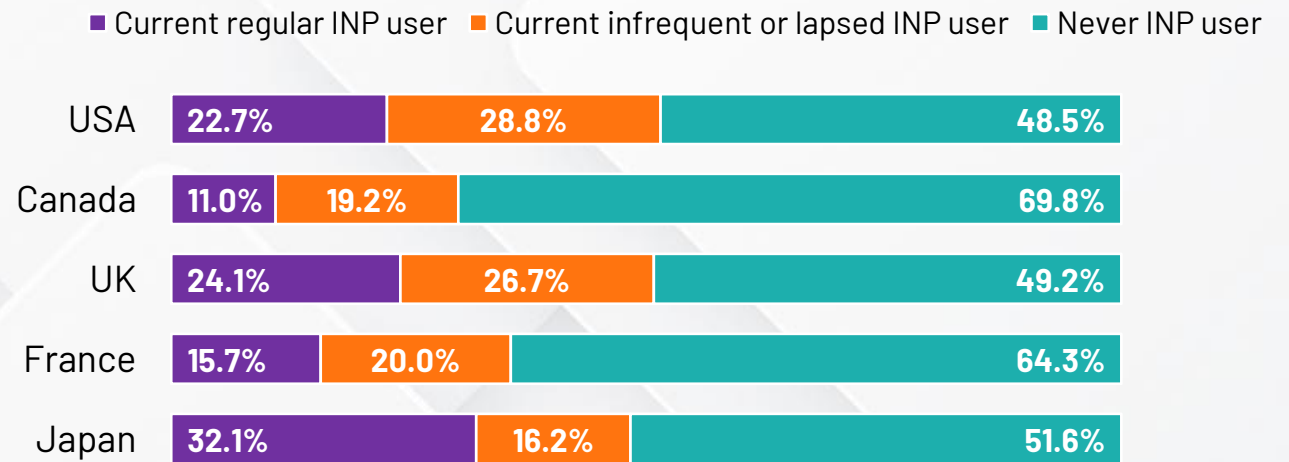
Relationship to Quitter



INP Usage in Cessation



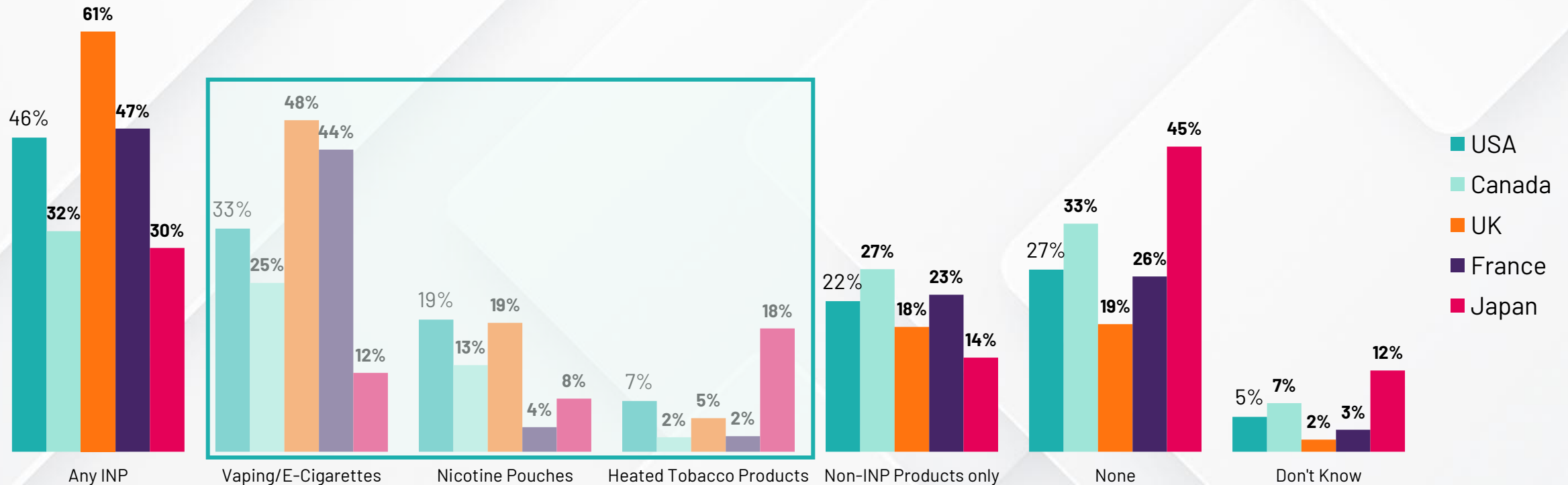
INP Usage Status



Cessation Details

Cessation Products Used – INP vs. Others

The proportion of those who stopped smoking cigarettes with the help of at least one innovative nicotine product ranged from just under 30% (**Japan**) to over 60% (**UK**). With the exception of Japan, e-cigarettes were the most commonly used product in each country, followed by nicotine pouches, and heated tobacco products. The latter is the dominant product for ceasing cigarette smoking in Japan. Japan also stands out from the other countries in that more than four in ten who stopped smoking cigarettes did so without the help of any other product.



Question: Which of the following products or services did your [friend/relative] use to help themselves stop smoking cigarettes?

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850

Perceived Health and Lifestyle Changes

Perceived Health and Lifestyle Changes Summary

Emotional and Social Outcomes

Those who used INP to quit demonstrated markedly improved emotional well-being compared to those who quit without INP, according to friends and family.

	Improvement With INP Use	Improvement Without INP Use
Mood	38-61%	25-50%
Self-confidence	34-60%	20-47%
Personal presence	32-64%	18-51%
Emotional sensitivity	32-55%	19-36%
Sociability	26-55%	14-41%

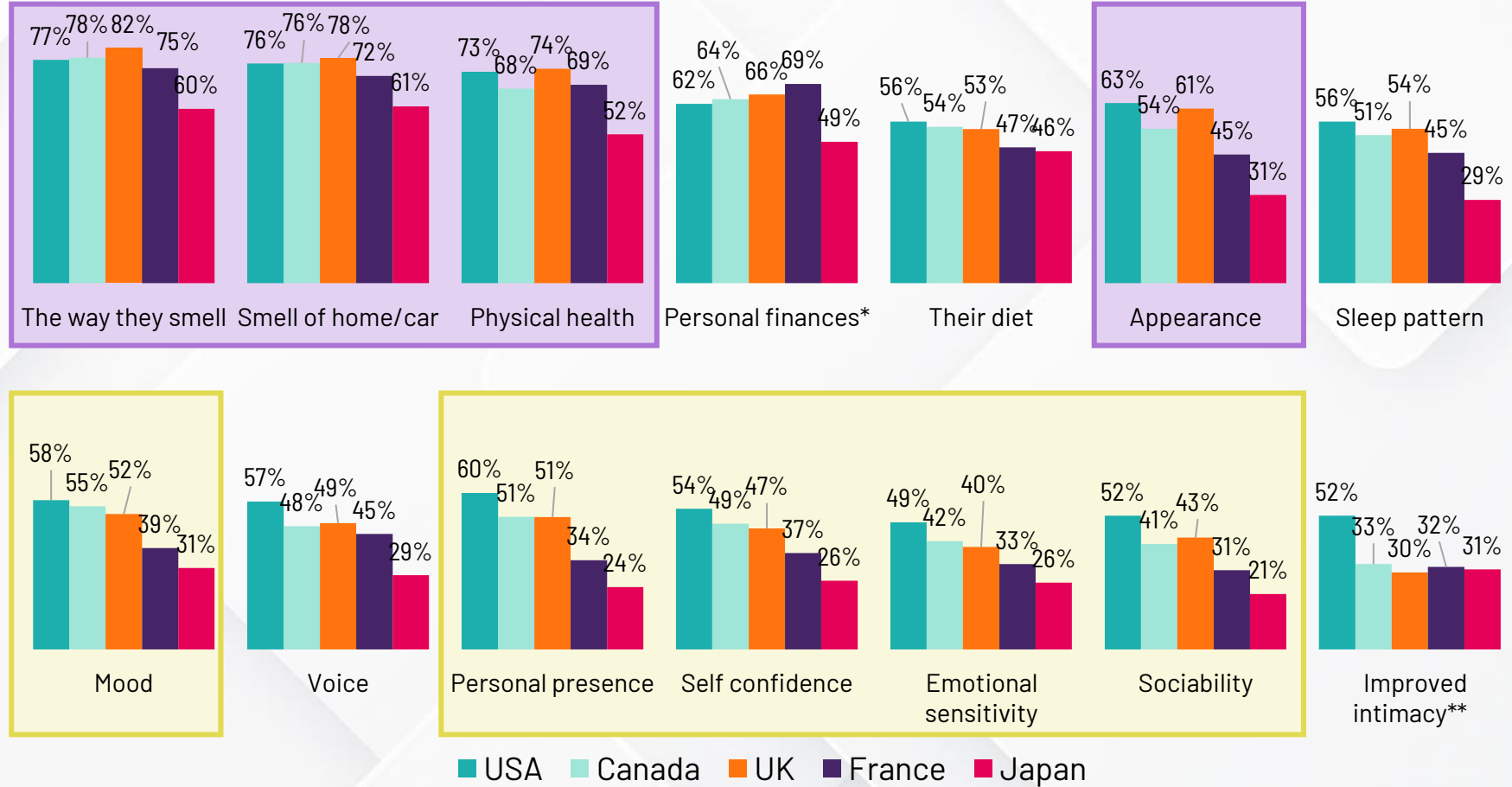
The study reveals that INP usage during cessation was associated with positive outcomes for entire households and social networks:

Perceived Health and Lifestyle Changes

Top-2-Box

The study assessed perceived changes with the person quitting, as well as the person who was close to the friend or relative who quit.

When it comes to perceived changes of the quitter, across all countries studied, **personal appearance and physical improvements including smell** have been more noticeable when friends and relatives quit smoking cigarettes, compared with more **emotional aspects** such as mood, personal presence, etc.



Question: Comparing the time when [your friend/relative] was still smoking cigarettes to now, what type of changes, if any, did you notice with [your friend/relative]? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know; Top-2-Box: much better now or somewhat better now

* Asked for about spouse and child ** Asked for about spouse

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850; excludes Don't Know

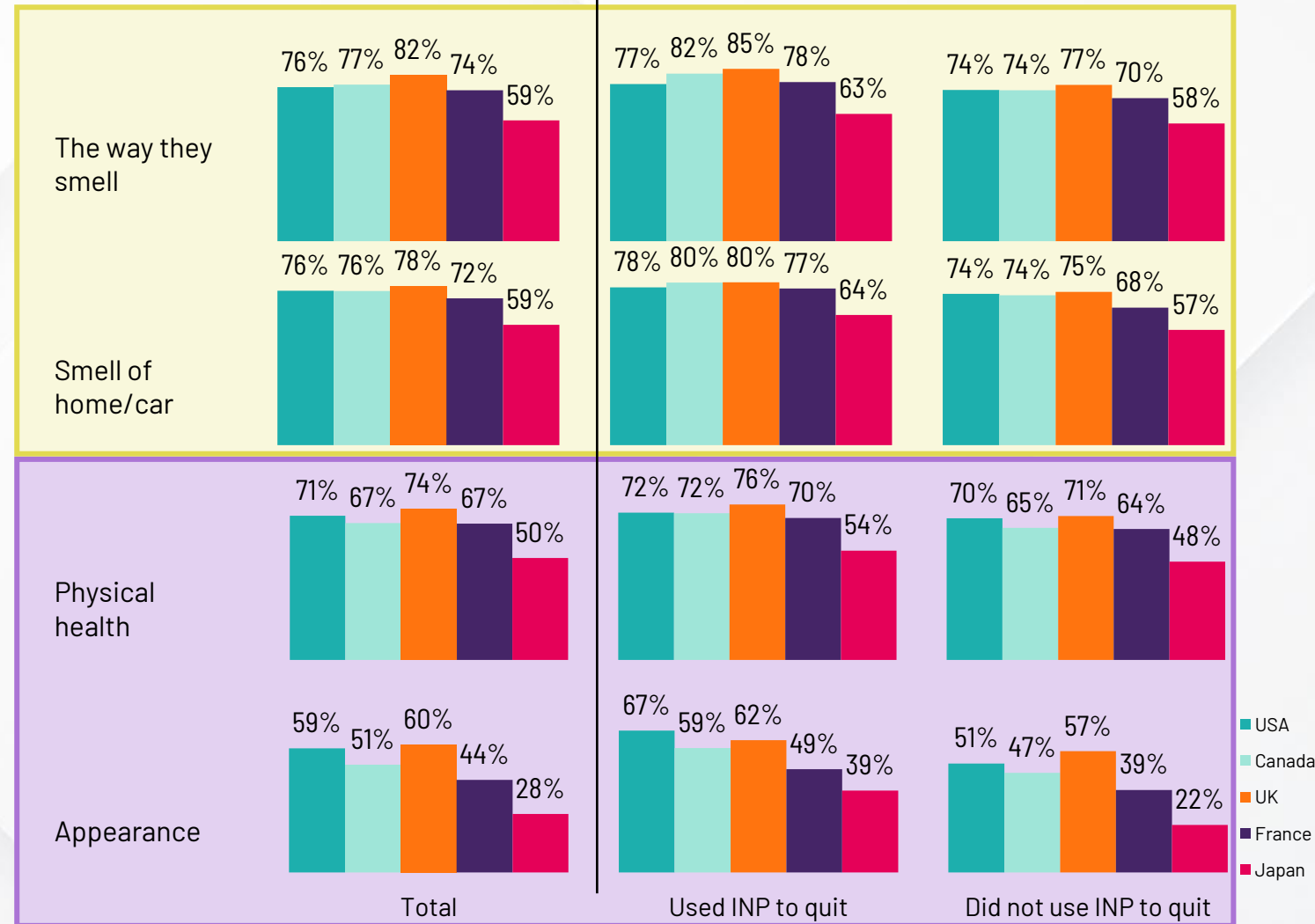
Perceived Enhanced Appearance and Physical Improvements

Top-2-Box

The most frequently observed changes in friends and relatives who quit smoking related to appearance and physical attributes, including the way they smell.

Improvements in appearance were less frequently observed, especially in **Japan** and to a lesser degree in **France**.

With respect to the way someone smells or how their car or home smells, having used INP makes only a small difference across the board. For appearance, however, there is a noticeable difference between those who used INP and those who did not, with INP users exhibiting a substantively bigger improvement in their appearance than those who did not use INP to quit smoking cigarettes.



Question: Comparing the time when [your friend/relative] was still smoking cigarettes to now, what type of changes, if any, did you notice with [your friend/relative]? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know; Top-2-Box: much better now or somewhat better now

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Perceived Emotional Aspects

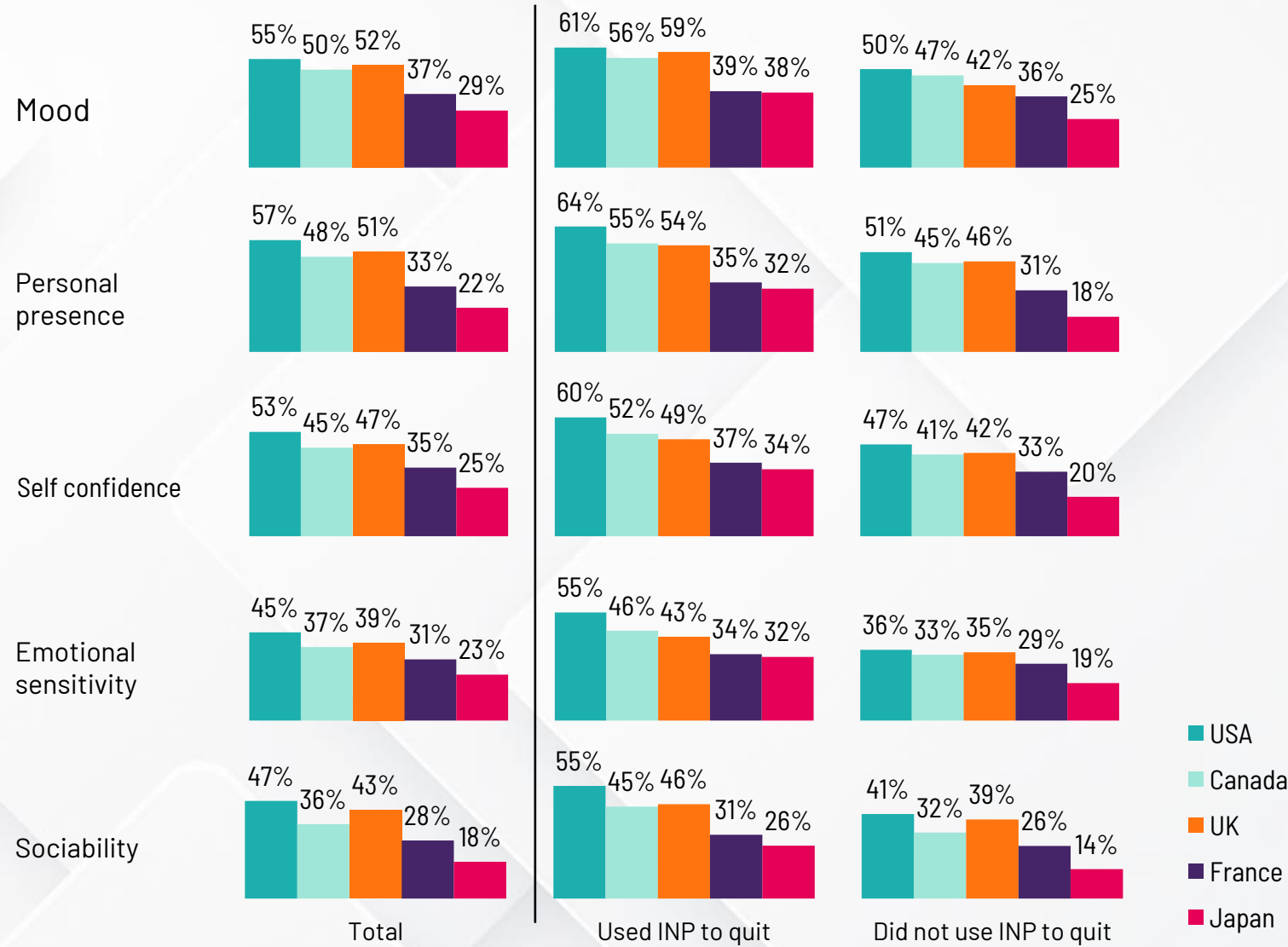
Top-2-Box

Perceived emotional aspects have not been noticed to the same degree as physical aspects, yet using INP impacts the outcome substantively.

Across all countries and all aspects such as their mood, personal presence, self confidence, emotional sensitivity, and sociability, those who used INP to quit smoking saw more improved outcomes.

Furthermore, while the absolute values differ between the five countries, the rank order of those attributes is almost the same across the board.

The absolute values are highest in North America (USA, Canada), followed by Europe (UK, France) and Japan. The fact that Canada is lagging behind the UK can be attributed largely to the smaller proportion of Canadian smokers using INP to quit.



Question: Comparing the time when [your friend/relative] was still smoking cigarettes to now, what type of changes, if any, did you notice with [your friend/relative]? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know; Top-2-Box: much better now or somewhat better now

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Changes in Quality of Life

Changes in Quality of Life Summary

Quality of Life Improvements

Quality of life improvements were consistently higher when the quitter used INP. Shared experiences improved significantly, including:

- Ability to spend quality time together for social activities
- Participation in exercise together
- Enjoyment of restaurant outings

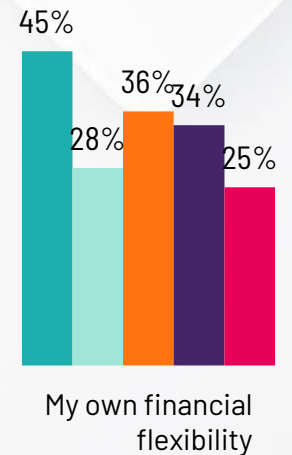
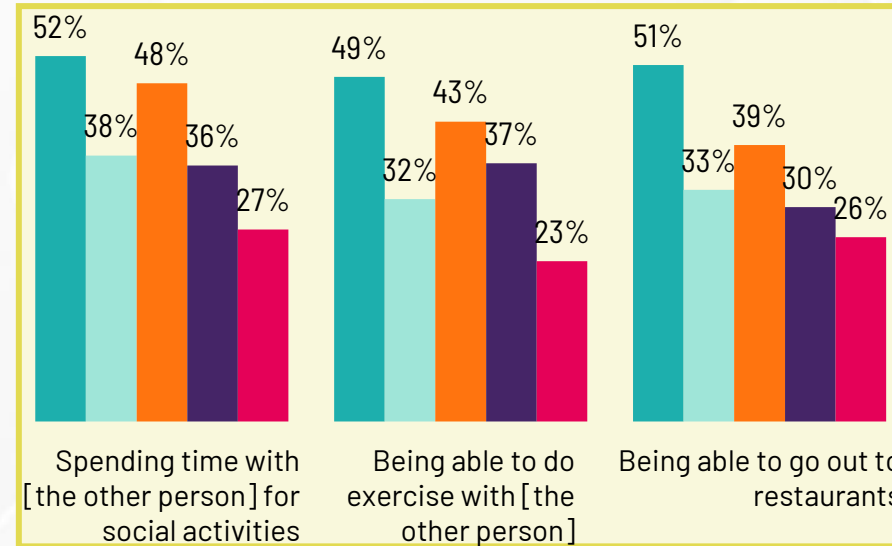
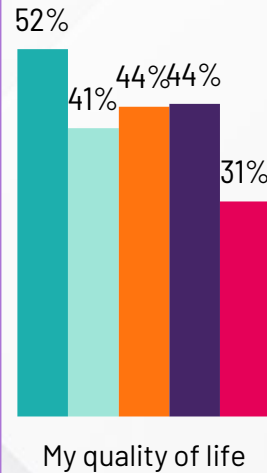
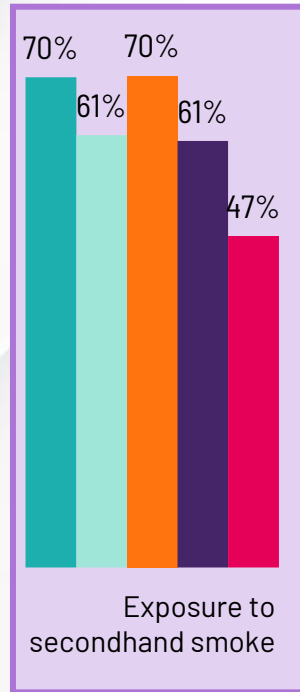
Those living in the same household experienced the greatest quality of life improvements when the quitter used INP.

Changes in Quality of Life

Top-2-Box

The most pronounced change for people whose loved ones quit smoking cigarettes across all countries studied is **exposure to secondhand smoke**.

In general, this is followed by a more general improvement in the quality of life of the person who is close to someone who quit smoking, and then an improvement to **shared experiences** with the person who quit smoking, such as for social activities, exercise, and going out to restaurants.



■ USA ■ Canada ■ UK ■ France ■ Japan

Question: And what type of changes did you experience yourself since [your friend/relative] stopped smoking? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know; Top-2-Box: much better now or somewhat better now

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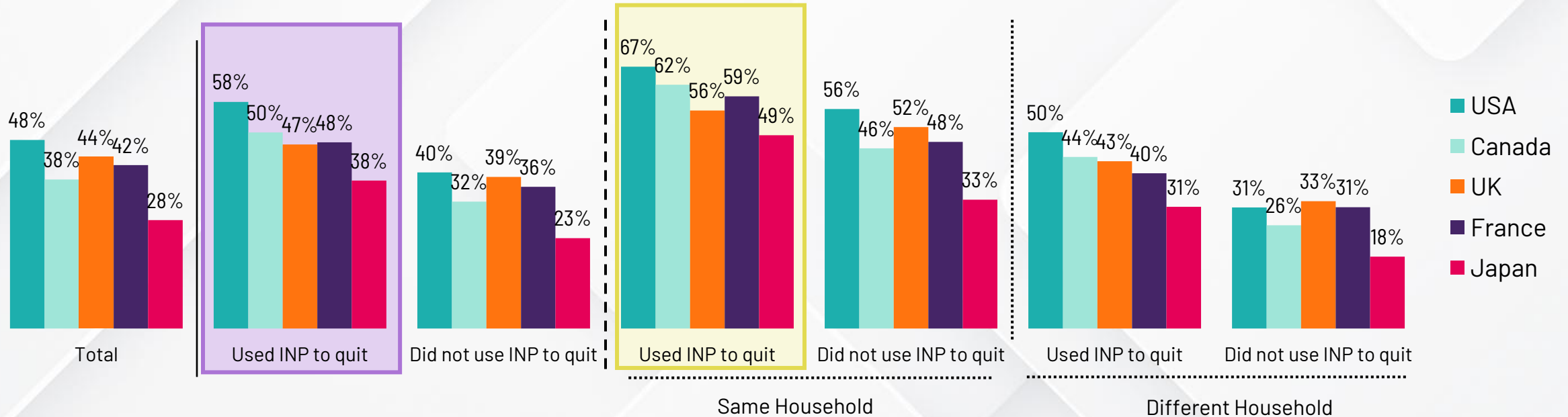
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Quality of Life by INP Use

Top-2-Box

In all countries studied, quality of life of those close to someone who quit smoking increased more on average if the person quitting used INP.

The biggest improvement gains were observed among those **who lived in the same household at the time someone quit with the help of INP.**



Question: And what type of changes did you experience yourself since [your friend/relative] stopped smoking? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know;

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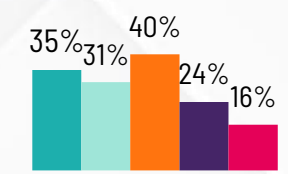
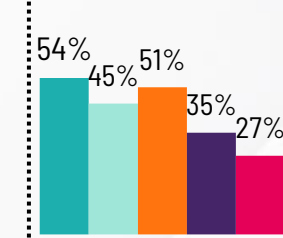
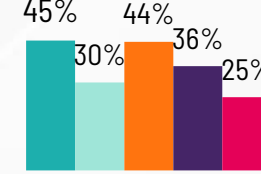
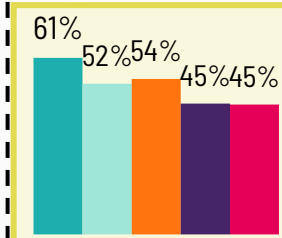
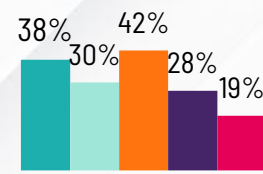
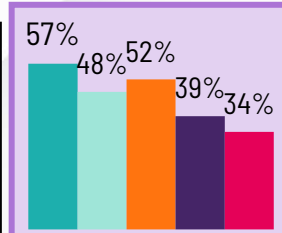
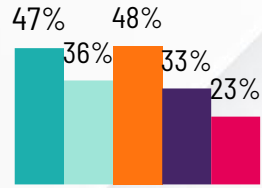
Spending quality time with person who quit by INP Use

Top-2-Box

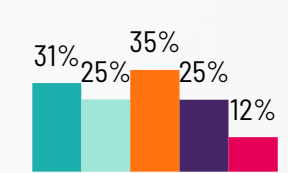
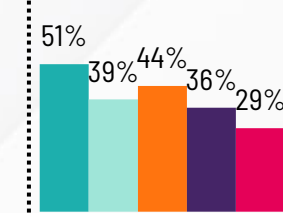
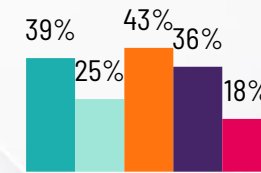
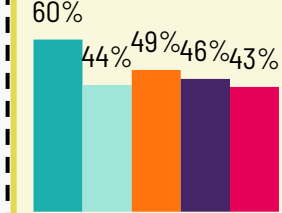
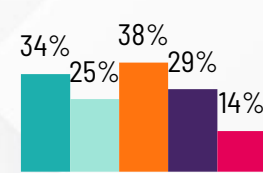
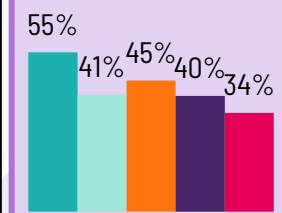
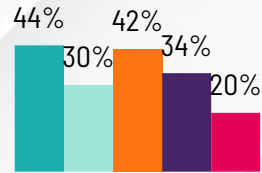
The ability to share moments with a close friend or relative who quit smoking is markedly higher among those whose friend or relative **used INPs to quit smoking** in all countries studied

The biggest gains are among **those who lived in the same household and also used INP when they quit smoking**

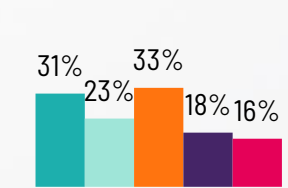
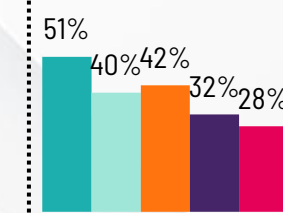
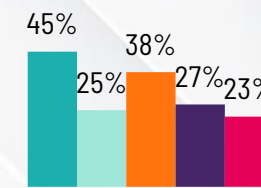
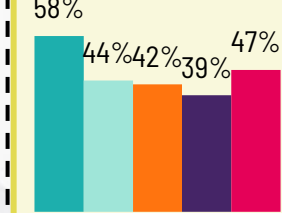
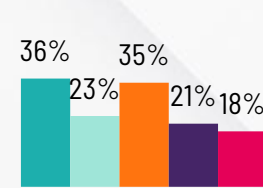
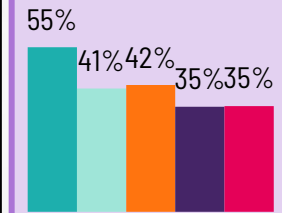
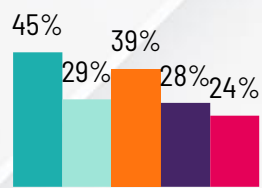
Social Activities



Exercise



Going to Restaurants



Question: And what type of changes did you experience yourself since [your friend/relative] stopped smoking? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know; Top-2-Box: much better now or somewhat better now

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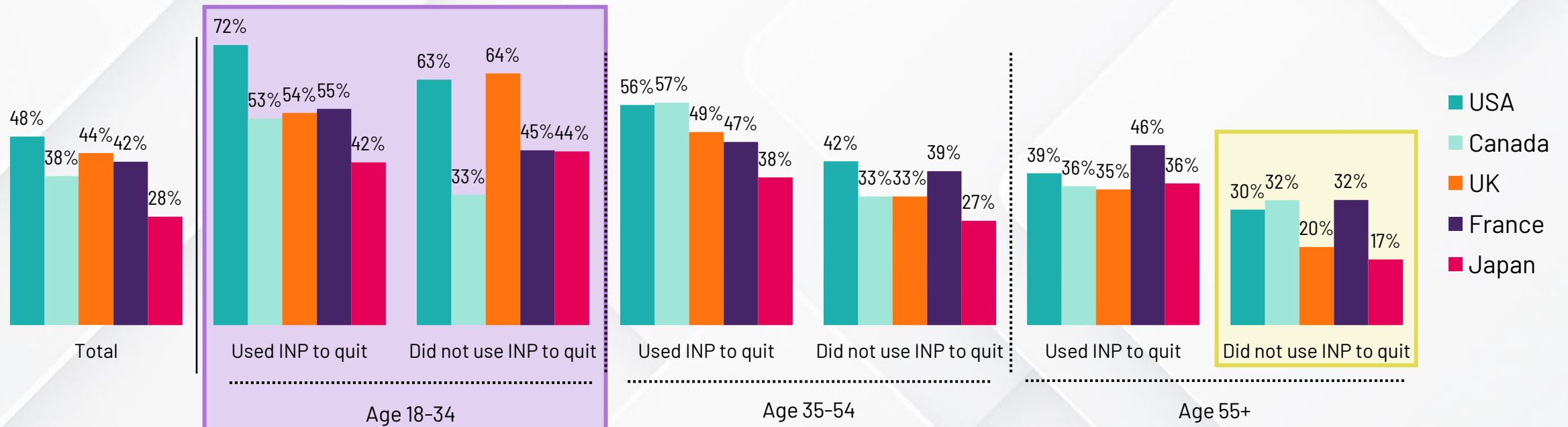
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Quality of Life by Age

Top-2-Box

The biggest gains in quality of life caused by a close friend or relative quitting smoking can be seen for **the youngest segment** (age 18-34) in all countries studied apart from Canada. In **Canada**, the middle age segment (35-54) sees an equally big improvement as those age 18-34.

The smallest improvements in quality of life can be seen in the **UK** and **Japan** among **those age 55+ when the friend or relative did not use INP to quit smoking**.



Question: And what type of changes did you experience yourself since [your friend/relative] stopped smoking? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know;

Top-2-Box: much better now or somewhat better now

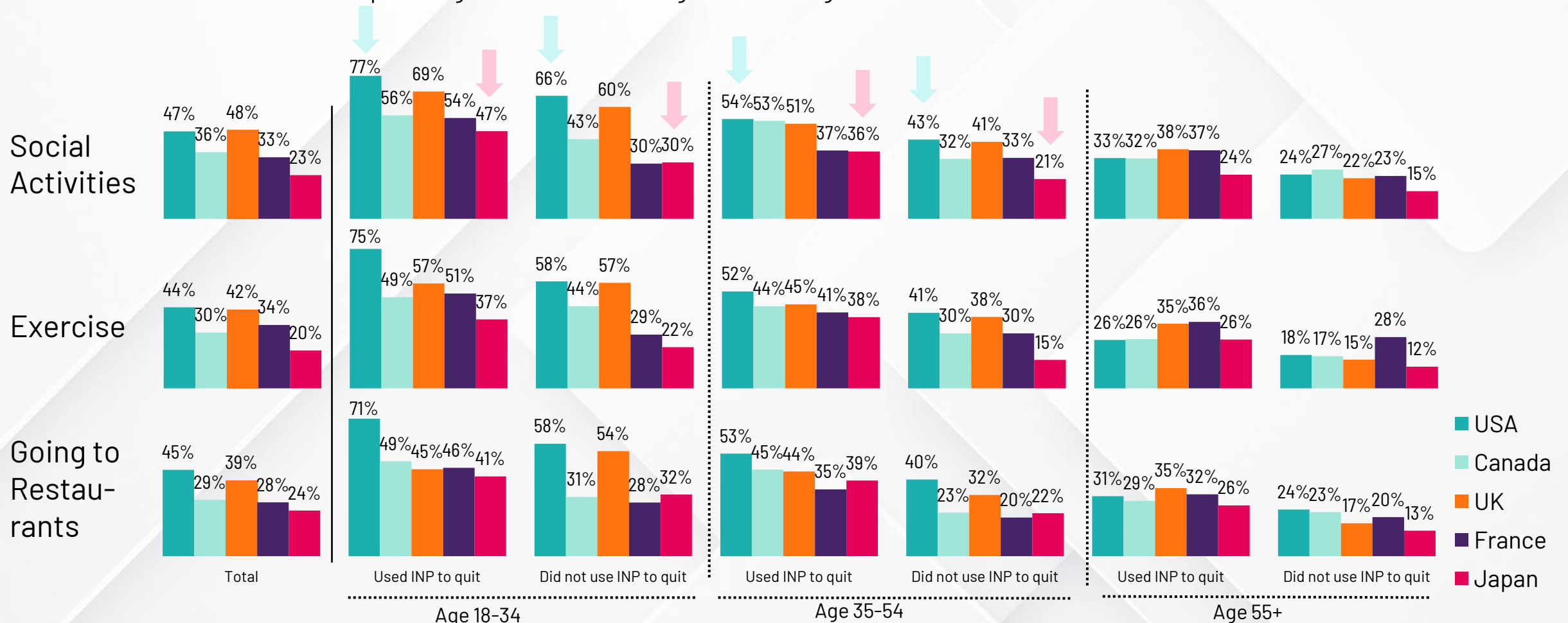
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Spending quality time with person who quit by INP Use

Top-2-Box

For younger people, those age 18-34, the gain of quality time is substantively higher than for those older, especially those age 55+. Especially in the **USA** and in **Japan**, there is a big impact by having quit using INP for both those age 18-34 and age 35-54.



Question: And what type of changes did you experience yourself since [your friend/relative] stopped smoking? - [ITEM] much better now, somewhat better now, no change, somewhat worse now, much worse now, don't know;

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Sentiment towards INP

Attitudes towards INP

Summary

Strong Public Support for INP Access

There is overwhelming support for adult smokers' rights to access INP:

- USA: 85% support
- UK: 86% support
- Japan: 85% support
- Canada: 70% support
- France: 71% support

Support increases by approximately 10+ percentage points among those whose friend or relative successfully used INP to quit smoking, demonstrating that positive experiences drive advocacy.

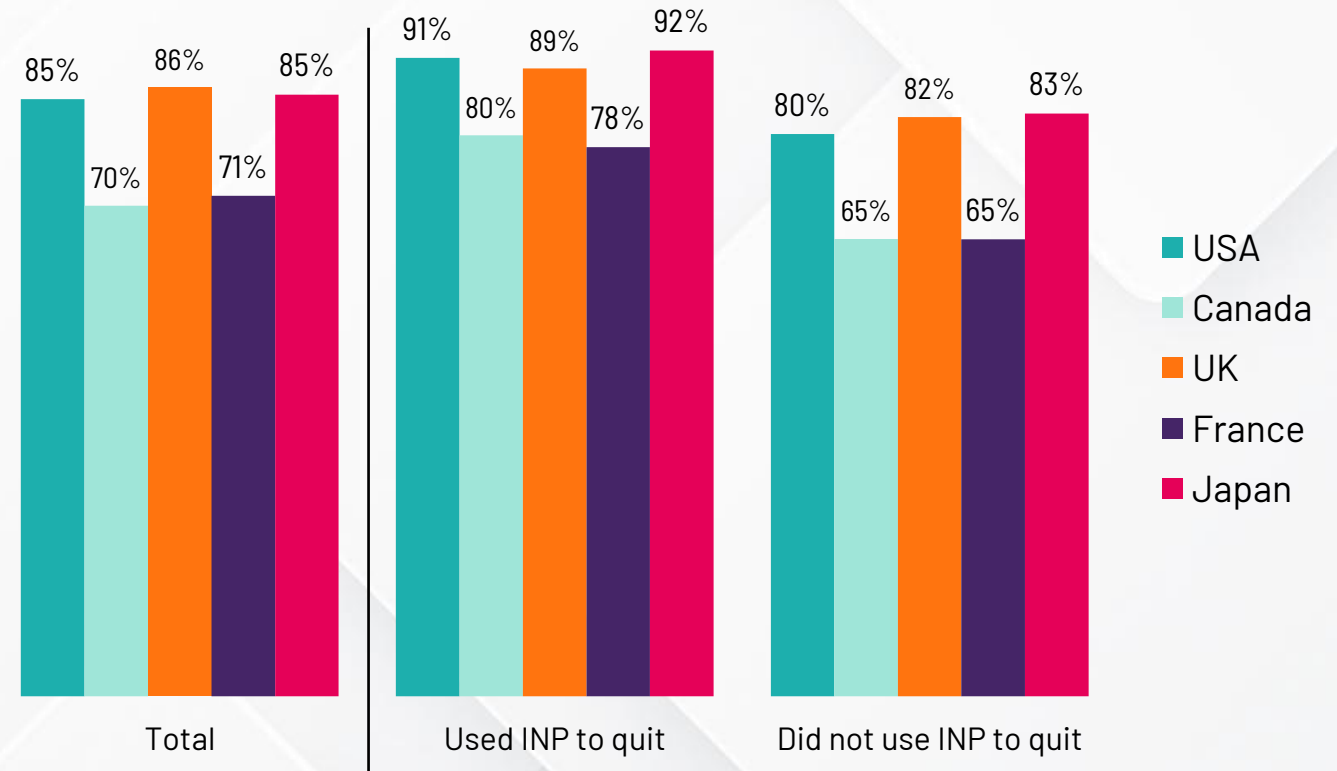
Support for adult smokers' rights to access INP

Top-2-Box

When asked whether they support “adult smokers' rights to access and switch to alternative nicotine products,” support is strongest and at similar levels in the **USA**, **UK**, and **Japan**.

In **Canada** and **France** however, support is much less enthusiastic.

In all countries, support increases if they have a friend or relative who used INP to quit smoking by about 10+ percentage points.



Question: Overall, how supportive are you of adult smokers' rights to access and switch to alternative nicotine products such as heated products, vapes, and nicotine pouches? Very supportive, somewhat supportive, somewhat opposing, very opposing

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850; excludes Don't Know

Support for adult smokers' rights to access INP

Top-2-Box

Support for adult smokers' rights to access INP is highest among those who are current regular INP users and who have a friend or relative who quit smoking cigarettes with the help of INP.

Support drops slightly if the respondent is not a current regular INP user but either has used or is still using INP.

By and large, those who have never used INP themselves show the lowest support for adult smokers' right to access INP, even though there is still more than a majority support for it. In that segment of never INP users, the impact of having a friend or relative who quit with the help of INP is biggest.

	Quitter	Current regular INP user	Current infrequent or lapsed INP user	Never INP user
USA	INP Use ✓	93.8%	90.8%	86.9%
	INP Use ✗	96.9%	87.5%	73.5%
Canada	INP Use ✓	91.1%	84.9%	72.3%
	INP Use ✗	90.7%	85.1%	59.0%
UK	INP Use ✓	97.7%	89.9%	83.8%
	INP Use ✗	91.9%	91.2%	73.8%
France	INP Use ✓	93.5%	85.7%	68.4%
	INP Use ✗	97.6%	80.3%	56.7%
Japan	INP Use ✓	96.1%	86.0%	88.0%
	INP Use ✗	95.2%	83.0%	77.7%

■ <80%
 ■ 80-90.9%
 ■ ≥91%

Question: Overall, how supportive are you of adult smokers' rights to access and switch to alternative nicotine products such as heated products, vapes, and nicotine pouches? Very supportive, somewhat supportive, somewhat opposing, very opposing

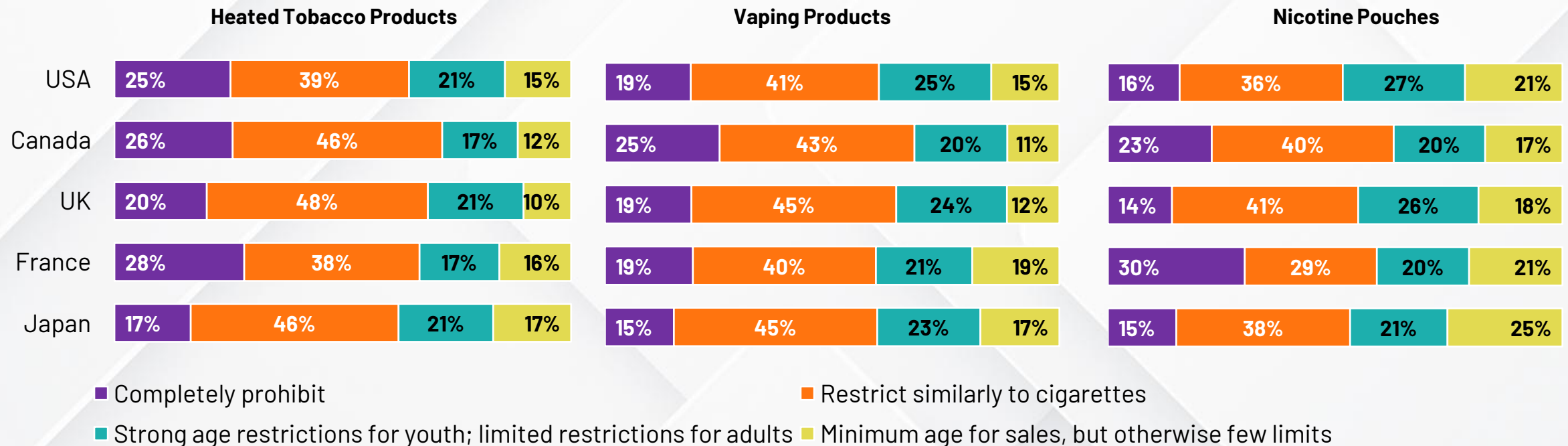
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Attitudes towards Regulation

Attitudes towards Regulation

Friends and relatives of those who quit smoking were asked about the level of regulation they would like to see for innovative nicotine products such as heated tobacco products, vaping products, and nicotine pouches. The options ranged from (1) complete prohibition, (2) restrictions similar to cigarettes (e.g. age limits, restrictions to use in certain locations, advertising restrictions, etc.), (3) strong age restrictions for youth and limited restrictions for adults (e.g. more usage locations for adults, less restrictive advertising rules), to (4) minimum age for sales, but otherwise few limits on usage locations, minimal advertising restrictions.

With one exception, a plurality in all countries would like to see similar regulation as for cigarettes for each INP product. The exception is nicotine pouches in France, where slightly more would like to see complete prohibition of pouches.



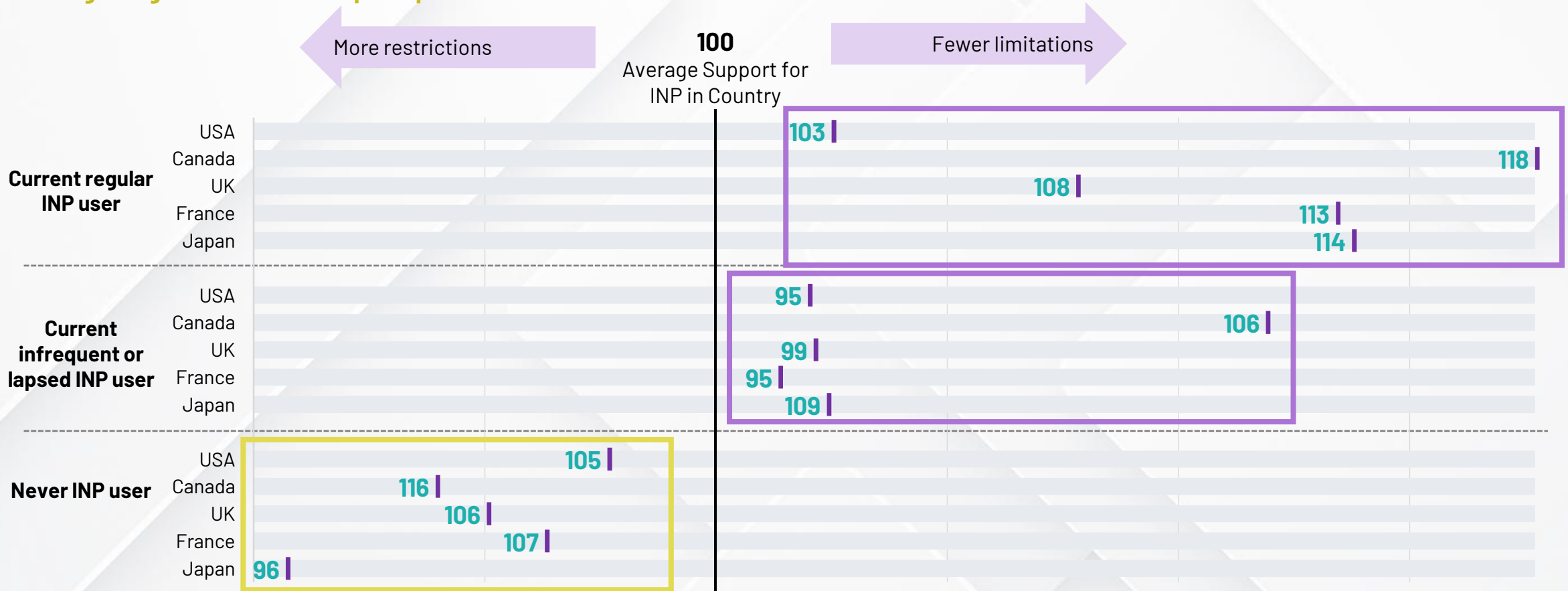
Question: Overall, how do you think regulators should treat innovative nicotine products such as heated tobacco, vaping and nicotine pouch products? - Heated tobacco products - these are battery powered devices that heat tobacco sticks instead of burning; these do not contain any liquid - Completely prohibit, Restrict similarly to cigarettes (e.g. age limits, restrictions to use in certain locations, advertising restrictions, etc.), Strong age restrictions for youth; limited restrictions for adults (e.g. more usage locations for adults, less restrictive advertising rules), Minimum age for sales, but otherwise few limits on usage locations, minimal advertising restrictions

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Index of Support for INP by own INP usage

Averaged by Country

Support for looser or tighter regulation of INP depends on the person's own INP use. Based on an index of support for less or more regulation and averaged to 100 for each country to level set each country, across all countries, those who currently use or in the past used INP endorse **less regulation** while those who have never used any INP, but still know people who quit smoking cigarettes, are more **in favor of tight regulation if not complete prohibition** of INP.



Question: Overall, how do you think regulators should treat innovative nicotine products such as heated tobacco, vaping and nicotine pouch products? - Nicotine pouches - these are small pouches that contain nicotine but no tobacco and are placed in the mouth between the lip and gum - Completely prohibit, Restrict similarly to cigarettes (e.g. age limits, restrictions to use in certain locations, advertising restrictions, etc.), Strong age restrictions for youth; limited restrictions for adults (e.g. more usage locations for adults, less restrictive advertising rules), Minimum age for sales, but otherwise few limits on usage locations, minimal advertising restrictions

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850

Perceived Efficacy of Products to Help Quit Smoking

Summary

High Perceived Efficacy

When friends or relatives witnessed INP being used for cessation, efficacy perceptions dramatically increased:

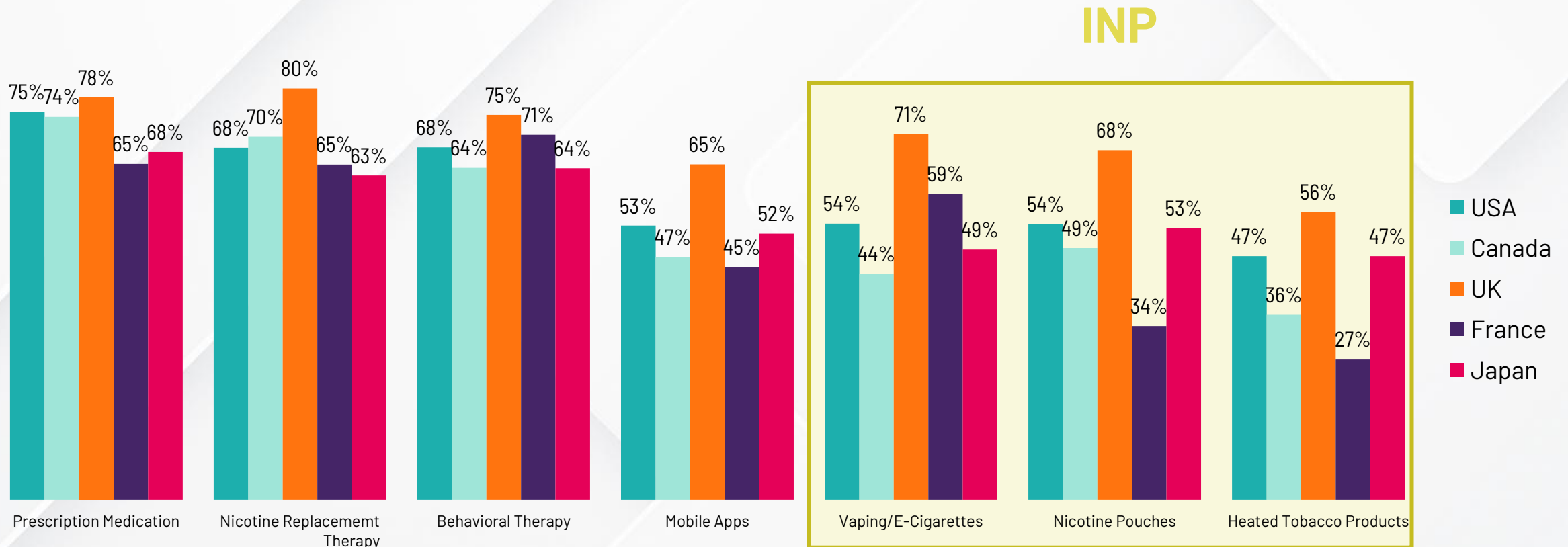
- Heated tobacco products: Up to 89% perceived as helpful
- Vaping products: Up to 84% perceived as helpful
- Nicotine pouches: Up to 87% perceived as helpful

These figures rival cessation methods like prescription medication, nicotine replacement therapy, and behavioral therapy when focusing on those who actually witnessed a friend or relative using those to quit smoking.

Perceived Efficacy of Products to Help Quit Smoking

Top-2-Box

When asked, how helpful each product is in their opinion in helping someone stop smoking cigarettes, prescription medication, nicotine replacement therapy, and behavioral therapy are the three approaches that are being considered the most helpful ones. INP and mobile apps are lagging behind in most countries with the UK having a smaller gap between the top choices and INP.



Question: Which of the following best describes how helpful each product is in helping someone stop smoking cigarettes? Very helpful in helping someone stop smoking cigarettes, somewhat helpful in helping someone stop smoking cigarettes, not very helpful in helping someone stop smoking cigarettes, not helpful at all in helping someone stop smoking cigarettes

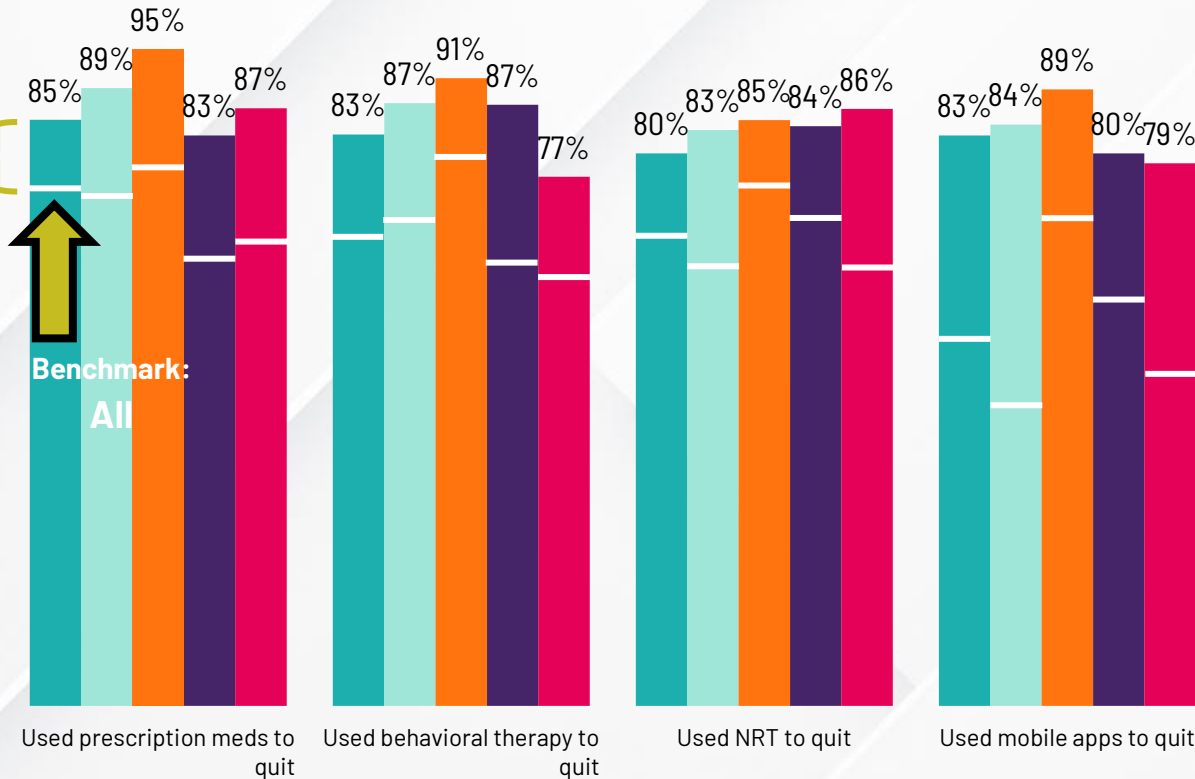
Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850

Perceived Efficacy of Products to Help Quit Smoking

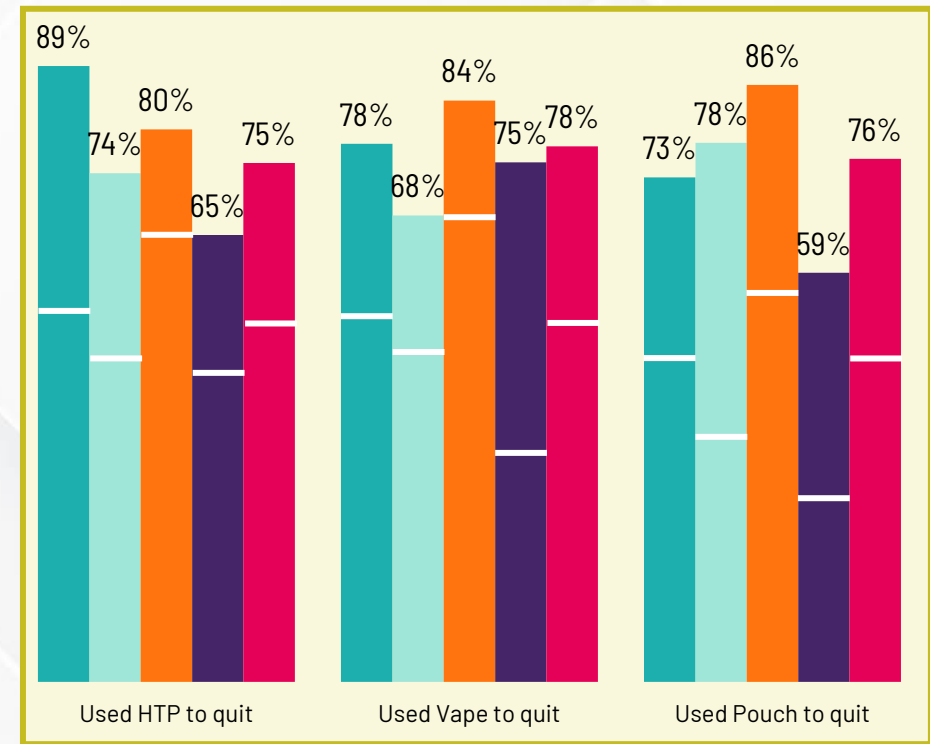
Top-2-Box

Whether a friend or relative has actually used a specific product to quit smoking has a big impact on how those products' efficacy is being assessed. For example, in the **USA** heated tobacco products (HTP) are perceived the most helpful product to quit smoking. In **France**, on the other hand, HTP and nicotine pouches are still considered to be less helpful than medication.

Lift b/c of usage by friend/relative



INP



- USA
- Canada
- UK
- France
- Japan

Question: Which of the following best describes how helpful each product is in helping someone stop smoking cigarettes? Very helpful in helping someone stop smoking cigarettes, somewhat helpful in helping someone stop smoking cigarettes, not very helpful in helping someone stop smoking cigarettes, not helpful at all in helping someone stop smoking cigarettes

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850

Attitudes towards Friend/Relative Quitting

Summary

Effectiveness Acknowledged by Close Observers

Those who witnessed a friend or relative quit using INP strongly endorse their effectiveness:

- 69-84% agree that switching to INP was an effective way for their friend/relative to quit smoking cigarettes
- 66-78% agreed it would not have been possible for their friend/relative to quit without INP

Recognized Safety Profile

A majority of friends/relatives of someone who quit smoking cigarettes, particularly those with experience of someone else using them, state that INP are significantly safer than traditional cigarettes:

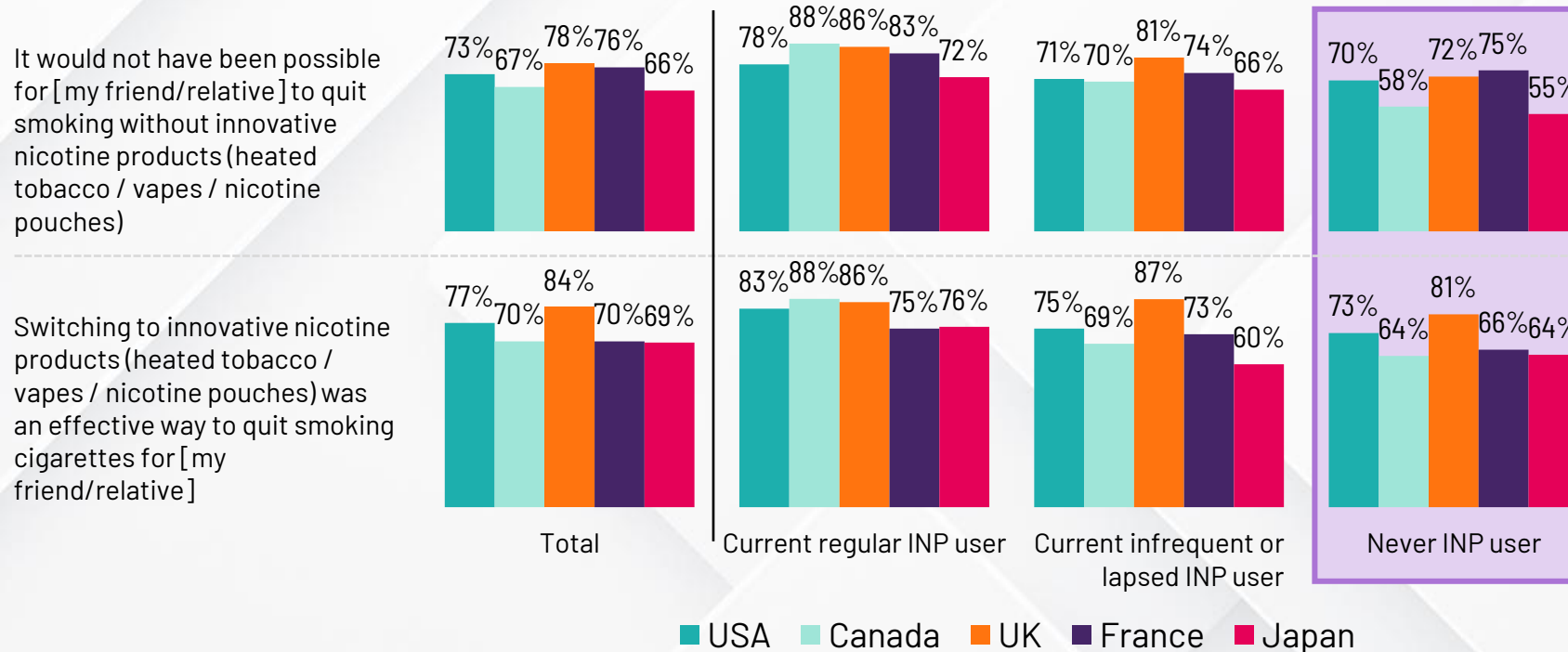
- Among those whose friend/relative used INP to quit, 54-73% agreed that INP are significantly safer than smoking cigarettes compared with 45-67% among those whose friend or relative did not use INP.

Efficacy of INP if Friend/Relative did use INP

Top-2-Box

Those whose friend or relative used INP to quit smoking were asked about INP as it relates to their friend or relative.

In general, if those answering had **never used INP themselves**, they are less enthusiastic about the impact INP had on their friends specific quitting experience. Especially in **Japan**, those who have never used INP are more skeptical that their friend or relative would not have been able to quit smoking without the help of INP.



Question: Please tell us if you agree or disagree with the following statements. Strongly agree, somewhat agree, somewhat disagree, strongly disagree

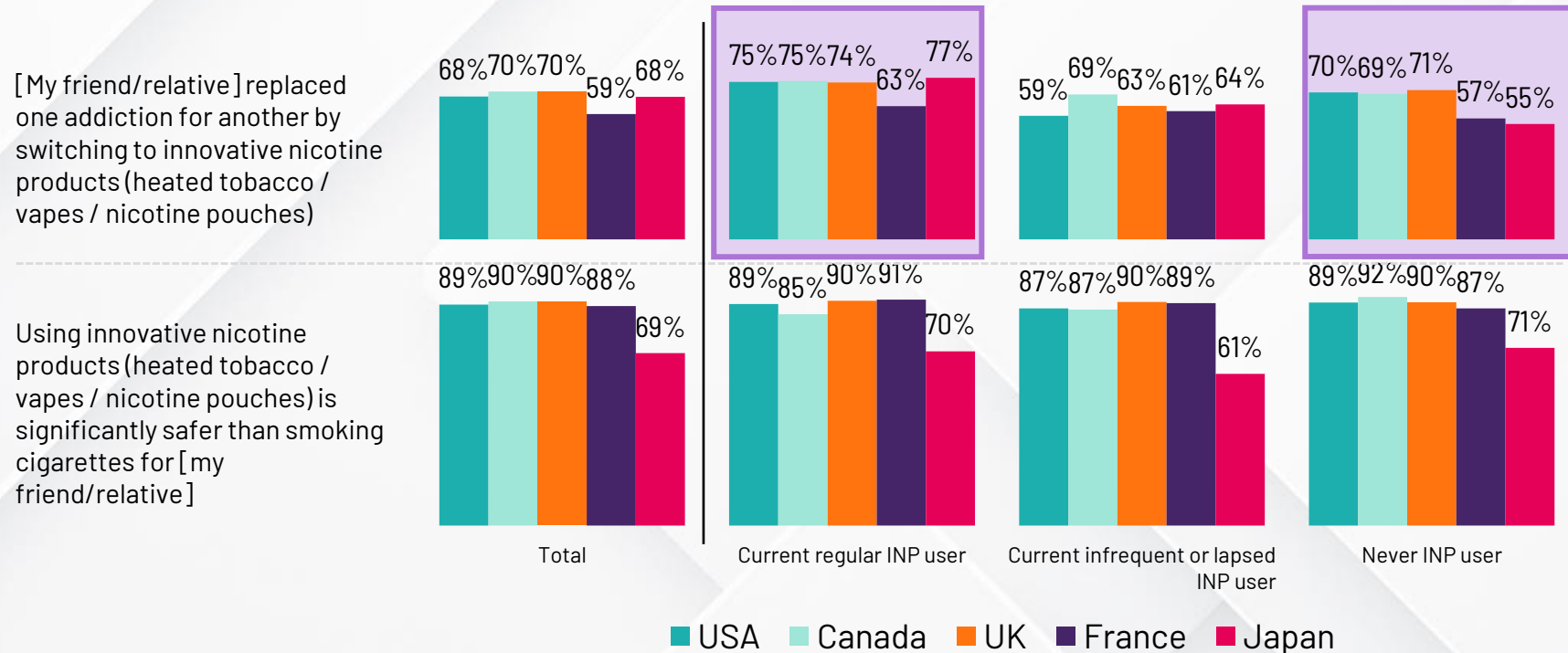
**[Friend/relative] used innovative nicotine products; **[Friend/relative] did not use innovative nicotine products

Base: USA: 459; Canada: 290; France: 354; UK: 313; Japan: 253

Safety of INP if Friend/Relative did use INP

Top-2-Box

When asked whether their friend or relative might have replaced one addiction with another as they used INP to quit smoking, in general the most concerned segment **are (a) current regular INP users and (b) those who have never used INP**. **Japan** and **France** slightly deviate from that patten, but generally, current infrequent or lapsed INP users are less concerned about this aspect.



Question: Please tell us if you agree or disagree with the following statements. Strongly agree, somewhat agree, somewhat disagree, strongly disagree

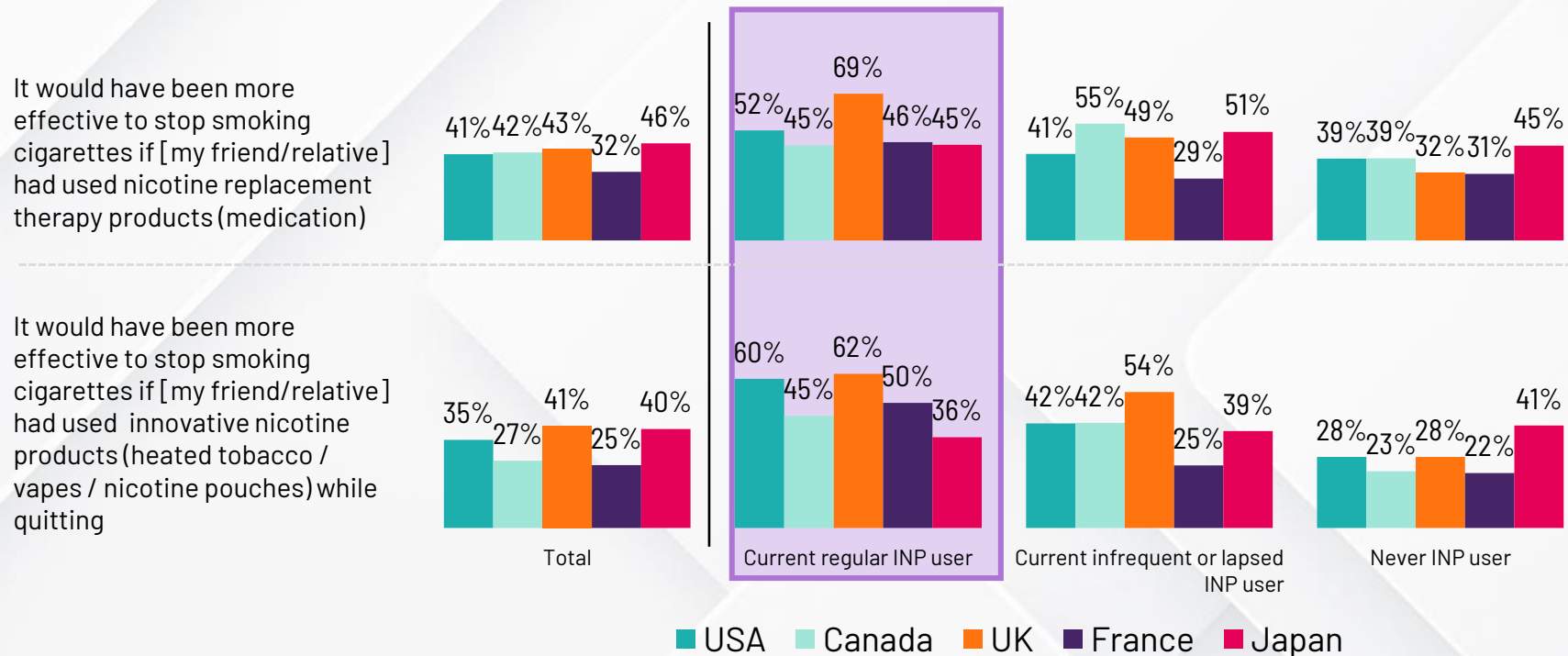
**[Friend/relative] used innovative nicotine products; **[Friend/relative] did not use innovative nicotine products

Base: USA: 459; Canada: 290; France: 354; UK: 313; Japan: 253

Efficacy of INP if Friend/Relative did not use INP

Top-2-Box

In general, if a friend or relative had not used INP, there is not a big conviction that either nicotine replacement therapy products or innovative nicotine products would have been more effective to stop smoking cigarettes with top-2-scores lower than 45%. Those who are **regular users of INP** themselves are more likely to believe those products would have been effective, with a big lift visible especially in the **UK**. **Japan** is on the other end of the spectrum in that INP usage does not differentiate much.



Question: Please tell us if you agree or disagree with the following statements. Strongly agree, somewhat agree, somewhat disagree, strongly disagree

**[Friend/relative] used innovative nicotine products; **[Friend/relative] did not use innovative nicotine products

Base: USA: 541; Canada: 610; France: 396; UK: 197; Japan: 597

Attitudes towards Friend/Relative Quitting – Quitting in General

Top-2-Box

There is wide-spread support for the more general statements that were tested:

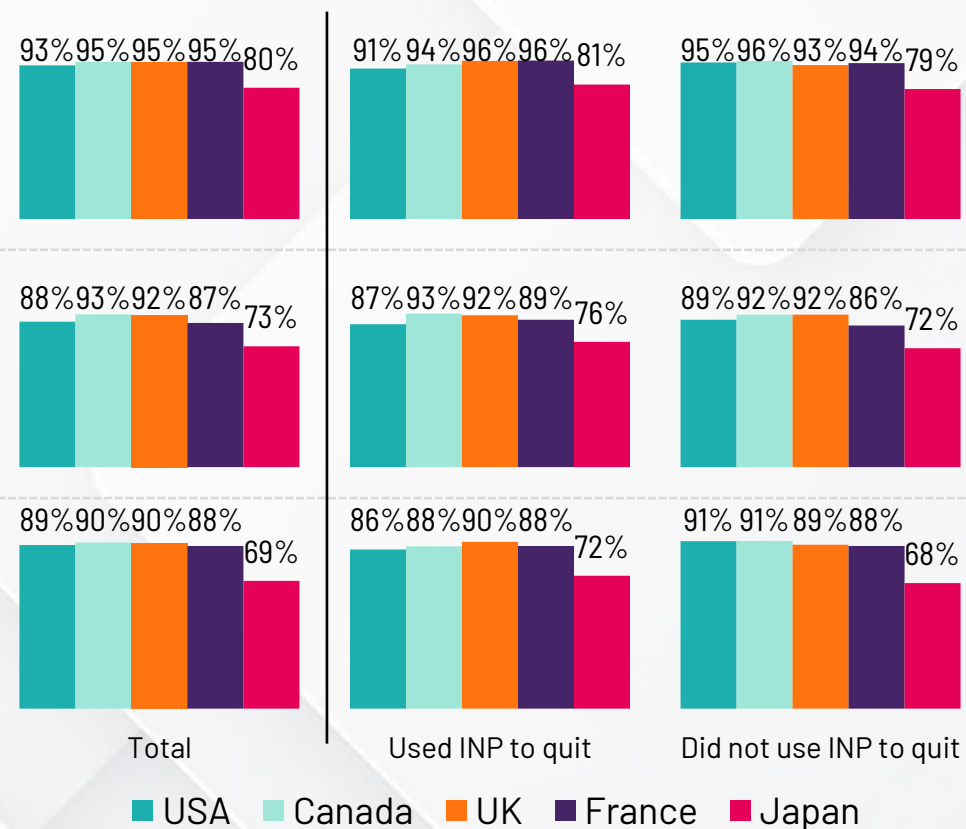
- *I am glad that [my friend/relative] stopped smoking cigarettes*
- *The benefits of quitting smoking are worth the discomfort of withdrawal for [my friend/relative]*
- *Quitting smoking significantly improved [my friend's/relative's] quality of life.*

There is no consistent pattern as to how INP use impacts attitudes towards those statements. In North America (**USA, Canada**) friends or relatives of those who quit without INP are slightly more likely to believe that quitting smoking significantly improved their life but the lift is reasonably small.

I am glad that [my friend/relative] stopped smoking cigarettes

The benefits of quitting smoking are worth the discomfort of withdrawal for [my friend/relative]

Quitting smoking significantly improved [my friend's/relative's] quality of life.



Question: Please tell us if you agree or disagree with the following statements. Strongly agree, somewhat agree, somewhat disagree, strongly disagree

**[Friend/relative] used innovative nicotine products; *[Friend/relative] did not use innovative nicotine products

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850

Attitudes towards Quitting in General

Quitting smoking is one of the hardest things a person can do

Top-2-Box

In North America (**USA, Canada**), those who are current regular INP users or current infrequent or lapsed INP users are less likely to agree with the statement that quitting smoking is one of the hardest thing a person can do compared to never users of INP. In the **USA**, if those regular users also have a friend who quit smoking with the help of INP are even less likely to agree with the statement.

In **Japan**, the overall level of agreement with this statement is lower than in the other four countries.

	Quitter	Current regular INP user	Current infrequent or lapsed INP user	Never INP user
USA	INP Use ✓	87.0%	83.6%	93.8%
	INP Use ✗	87.7%	87.5%	88.8%
Canada	INP Use ✓	89.3%	90.7%	91.2%
	INP Use ✗	88.4%	85.1%	88.8%
UK	INP Use ✓	95.3%	91.1%	83.8%
	INP Use ✗	83.8%	80.7%	85.4%
France	INP Use ✓	92.2%	91.7%	84.5%
	INP Use ✗	85.4%	87.9%	76.8%
Japan	INP Use ✓	78.1%	84.0%	78.7%
	INP Use ✗	75.2%	63.6%	62.6%

■ <84%
 ■ 84-89.9%
 ■ ≥90%

Question: Please tell us if you agree or disagree with the following statements about innovative nicotine products (heated tobacco / vapes / nicotine pouches) in general. Strongly agree, somewhat agree, somewhat disagree, strongly disagree

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850

Concern with long-term effects of INP

Top-2-Box

Those most concerned with the long-term effects of INP are for one more likely to be in North American and Europe than in **Japan**, and for another either those who have never used INP themselves or are current infrequent or lapsed users of INP.

	Quitter	Current regular INP user	Current infrequent or lapsed INP user	Never INP user
USA	INP Use ✓	77.8%	82.2%	91.0%
	INP Use ✗	80.0%	83.1%	86.2%
Canada	INP Use ✓	78.6%	86.0%	89.9%
	INP Use ✗	86.0%	85.1%	89.8%
UK	INP Use ✓	83.7%	93.7%	93.9%
	INP Use ✗	78.4%	84.2%	89.3%
France	INP Use ✓	71.4%	86.9%	88.6%
	INP Use ✗	85.4%	83.3%	85.1%
Japan	INP Use ✓	84.4%	80.0%	77.3%
	INP Use ✗	73.1%	75.0%	77.5%

■ <84%
 ■ 84-89.9%
 ■ ≥90%

Question: Please tell us if you agree or disagree with the following statements about innovative nicotine products (heated tobacco / vapes / nicotine pouches) in general. Strongly agree, somewhat agree, somewhat disagree, strongly disagree

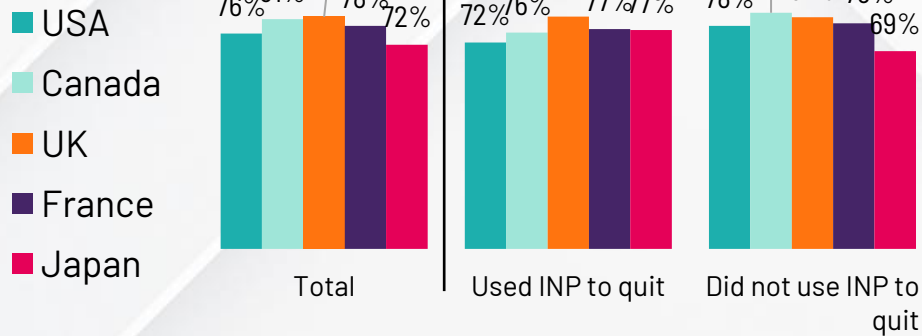
Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850

Cessation and INP

Top-2-Box

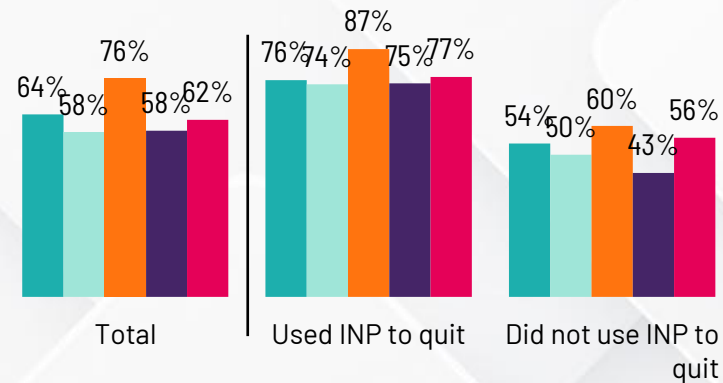
Using innovative nicotine products is just trading one addiction for another

There is general concern that using INP is trading one addiction for another, though in North America (**USA, Canada**) that is less pronounced among those whose friend or relative used INP to quit smoking.



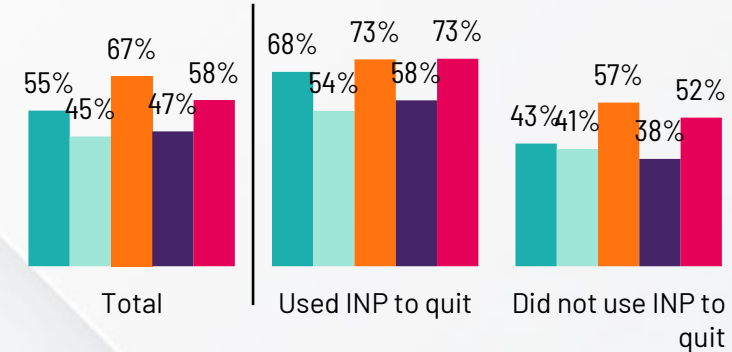
Switching to innovative nicotine products is an effective way to quit smoking cigarettes

Those whose friend or relative used INP to quit smoking are significantly more likely to agree that switching to INP is an effective way to quit smoking. While the absolute level differs across the countries, there is a consistent 20+ percentage point gap between the two segments.



Innovative nicotine products are significantly safer than smoking cigarettes

Similarly, those who have a friend or relative who quit smoking with the help of INP are more likely to agree that INP are significantly safer than cigarettes.



Question: Please tell us if you agree or disagree with the following statements about innovative nicotine products (heated tobacco / vapes / nicotine pouches) in general.

. Strongly agree, somewhat agree, somewhat disagree, strongly disagree

Base: USA: 1,000; Canada: 900; France: 750; UK: 510; Japan: 850



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