

Australian Retailers Association Survey

Final Report

June 2018



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Strategic Summary



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- 61% of voters say the strain of smoking-related disease on the health system is very important to their vote. The state of the public health system is also important (93%).
- Most Australians (53%) are unaware of, or don't know, that the sale and purchase of personal vaporisers is currently illegal in Australia.
- Voters in Australia support legalising the sale and purchase of personal vaporisers, with +16 net support. The 48% total support is underpinned by 20% strong support. Support is higher among those who are aware they are currently illegal, showing efforts to increase awareness (of illegality) are likely to boost support.
- There is also high support (61%) for making personal vaporisers and other less harmful alternatives available alongside cigarettes.
- 61% of Australian voters agree that the Government should ease regulations, including lowering restrictions and taxes, on new less harmful alternatives to cigarettes in order to encourage adult smokers to fully switch to these products.
- Male voters and younger voters (18-34 years) seem more supportive of the above proposals, showing they should be key targets in any campaign to legalise the sale and purchase of personal vaporisers in Australia.

Summary Methodology



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This research was undertaken to understand the opinions and behaviours of Australian voters on a range of retailing and health-related issues.

- Quantitative research (8th – 12th June 2018):
 - Online survey of n=1,200 randomly selected Australian adult residents (also voters)
 - Results accurate to +/-2.8% margin of error (at the 95% confidence interval)
 - Greater margins of error on smaller sub-samples
 - Minimum quotas and data weighting on area, sex and age to ensure accurate representation
 - Data broken down by demographics, state, smoking behaviour, and/or voting intention where appropriate
- Questionnaire was designed to identify:
 - Importance of selected issues to voters
 - Awareness and importance of retail sector employment in Australia
 - Levels of awareness and support for initiatives directed at improving the health of the Australian community



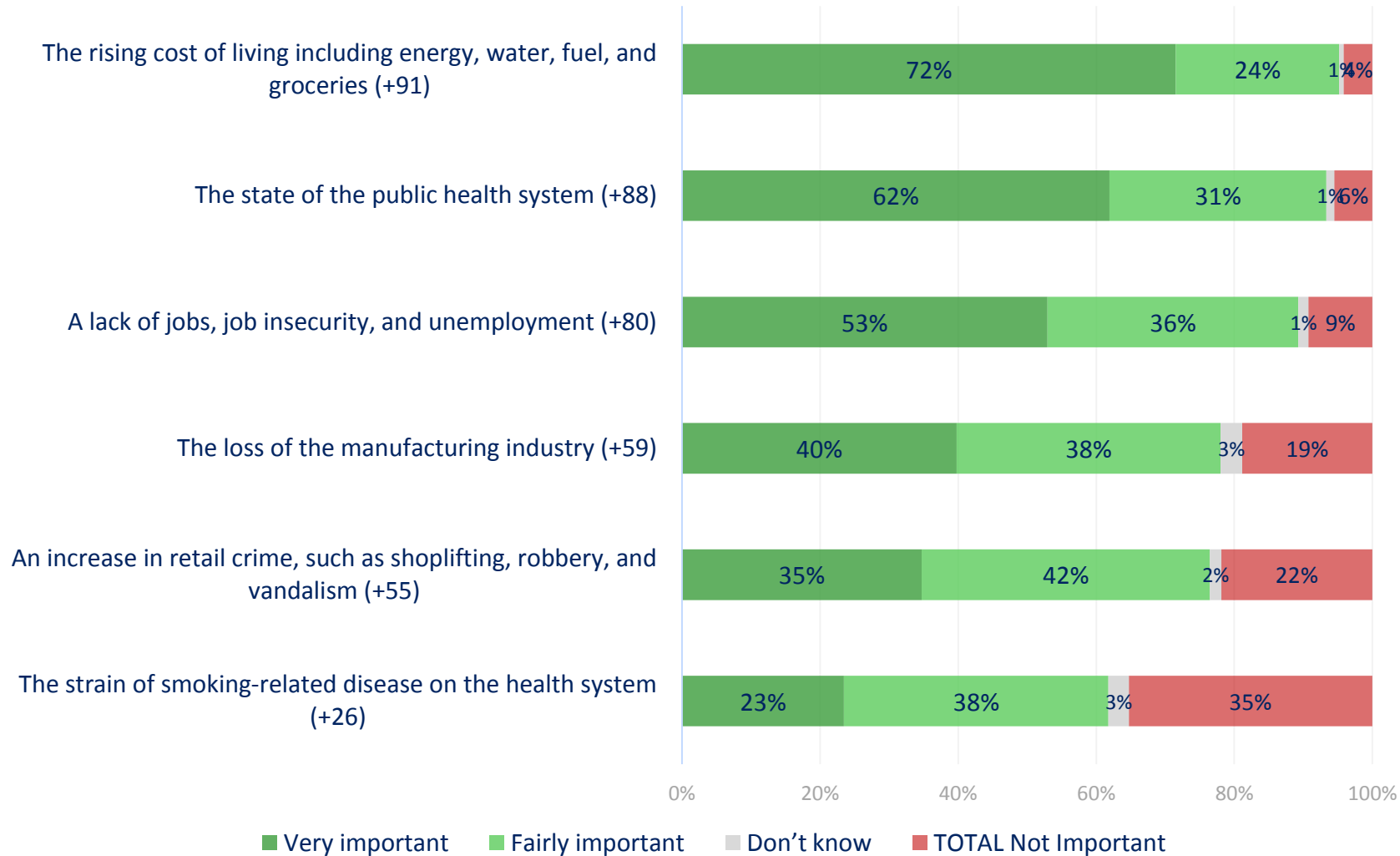
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Importance of Issues

Prompted Issue Importance



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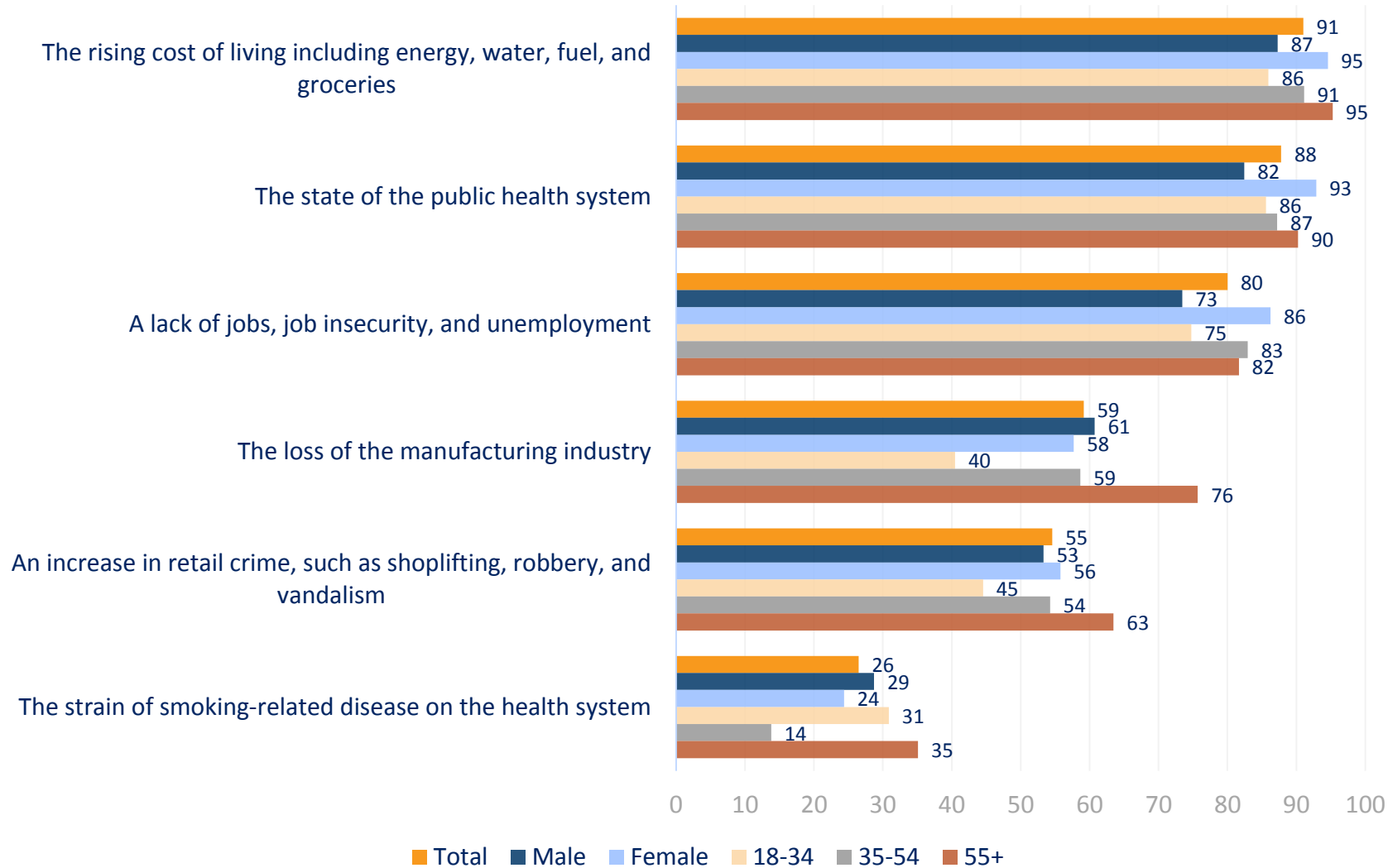
- The most ‘important’ prompted issue was cost of living.
- Though the state of the health system is very important to voters, too.
- The strain of smoking-related disease on the health system is of lower relative importance, but still important to 61% of voters.

Q4. You will now be shown a number of issues and actions that other people have told us are important. For each, please indicate whether you think it’s very important, fairly important, not very important, or not at all important to you and your vote. To what extent is that issue or action important to you and your vote? [SORTED BY NET IMPORTANCE shown in brackets]

Prompted Issue Importance – Demographics



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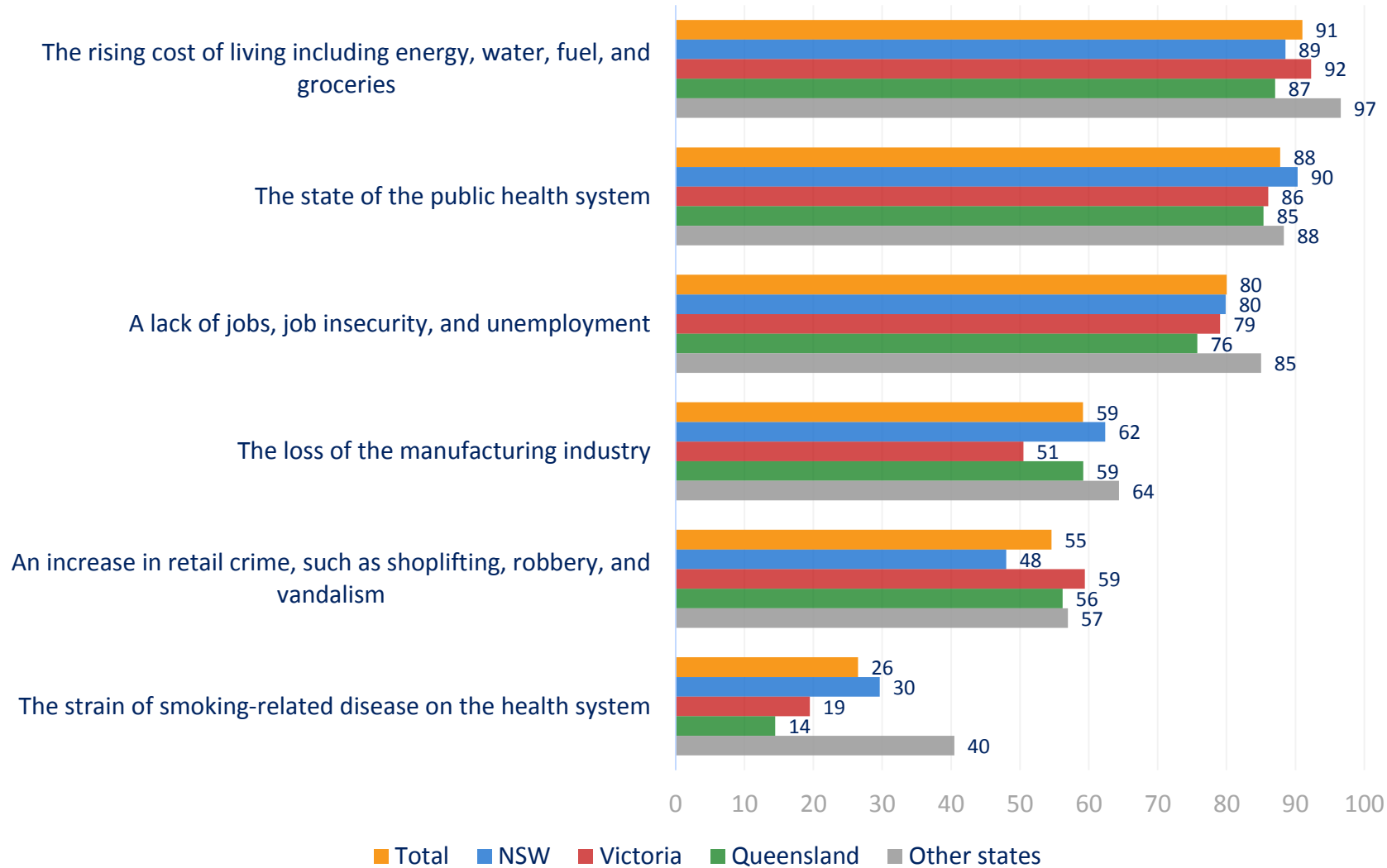
- The strain of smoking-related disease is rated as significantly less important by middle-aged voters (those aged 35-54).

Q4. You will now be shown a number of issues and actions that other people have told us are important. For each, please indicate whether you think it's very important, fairly important, not very important, or not at all important to you and your vote. To what extent is that issue or action important to you and your vote?

Prompted Issue Importance – State



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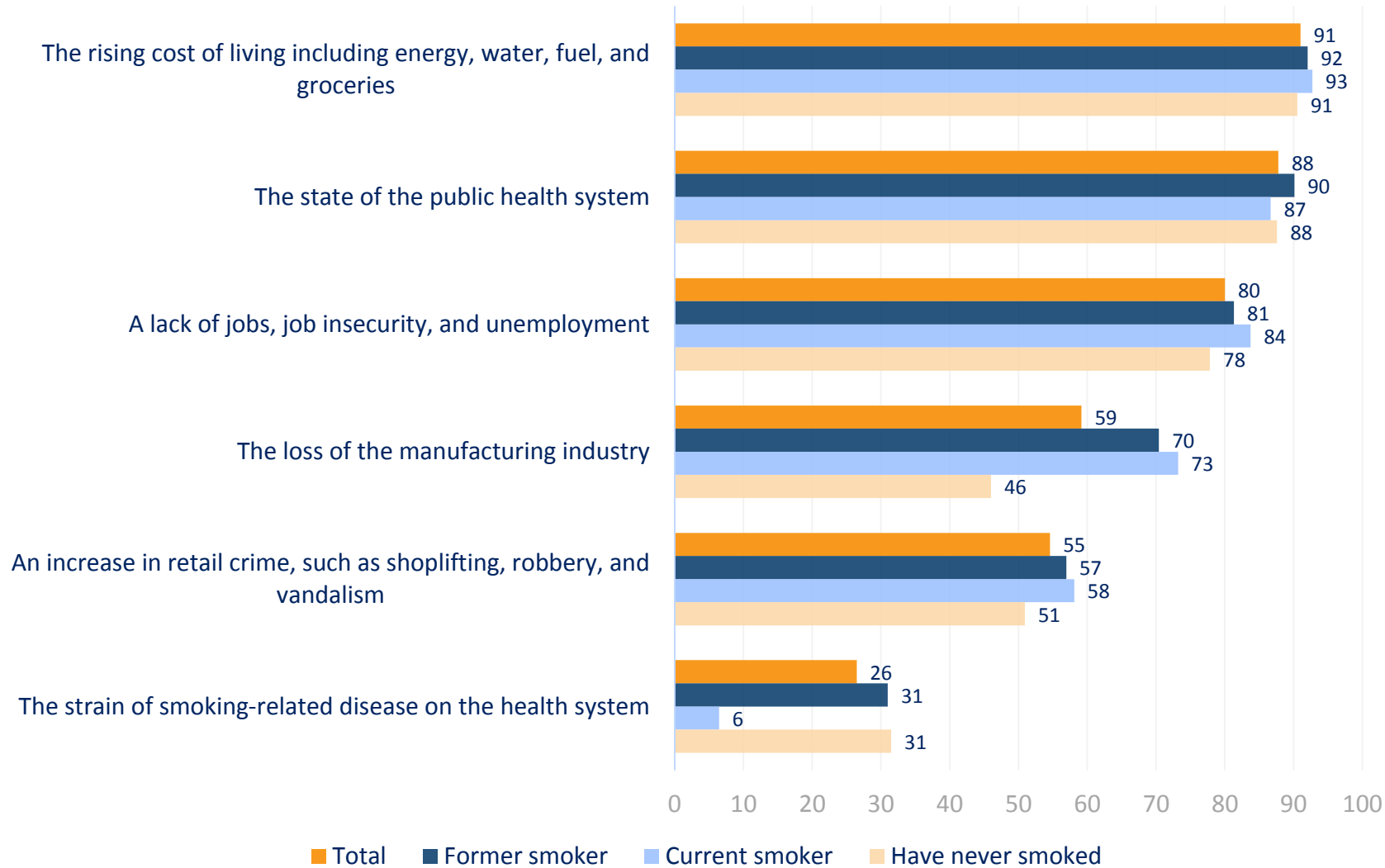
- Voters in the smaller states are significantly more likely than those in Queensland and Victoria to regard the strain of smoking-related disease on the health system as important.

Q4. You will now be shown a number of issues and actions that other people have told us are important. For each, please indicate whether you think it's very important, fairly important, not very important, or not at all important to you and your vote. To what extent is that issue or action important to you and your vote?

Prompted Issue Importance – Smoking Segments



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- Non-smokers are significantly more likely than current smokers to rate the strain of smoking-related disease on the health system as important.

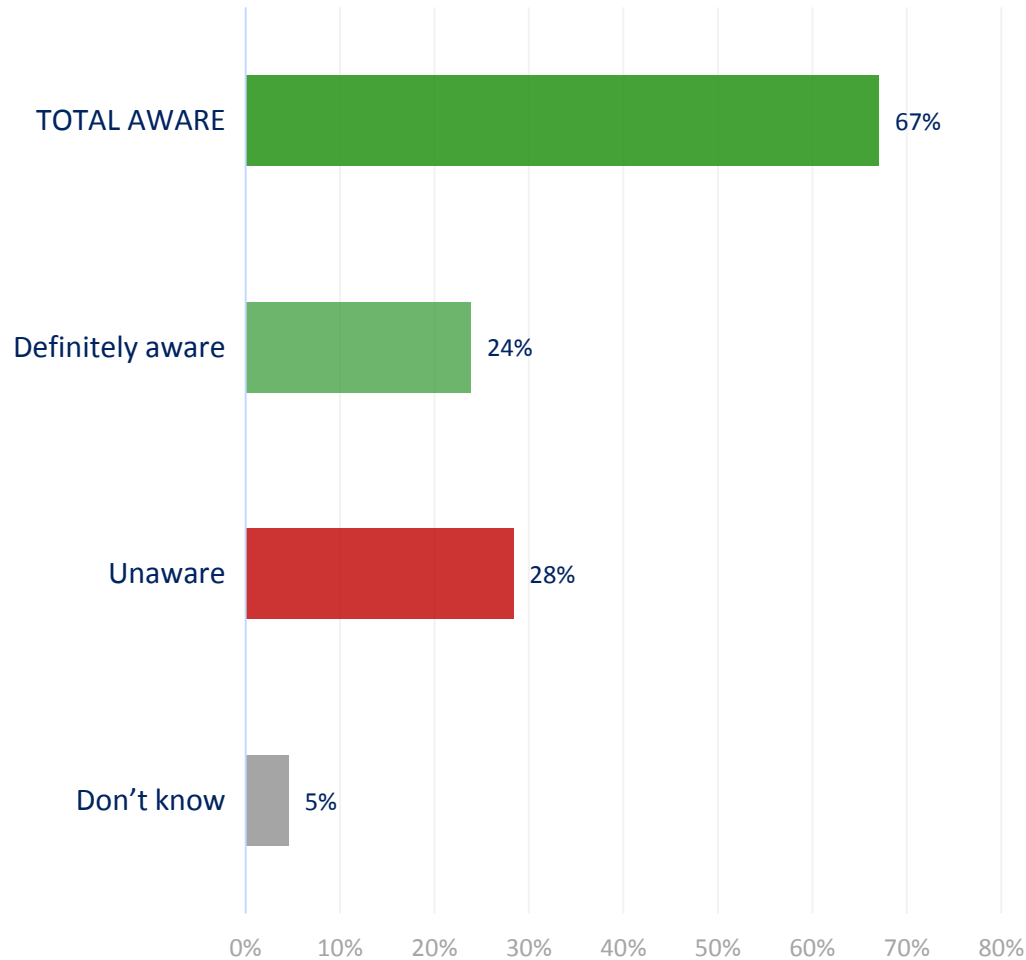
Q4. You will now be shown a number of issues and actions that other people have told us are important. For each, please indicate whether you think it's very important, fairly important, not very important, or not at all important to you and your vote. To what extent is that issue or action important to you and your vote?



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Importance of Retail Sector

Awareness of Retail Sector Employment



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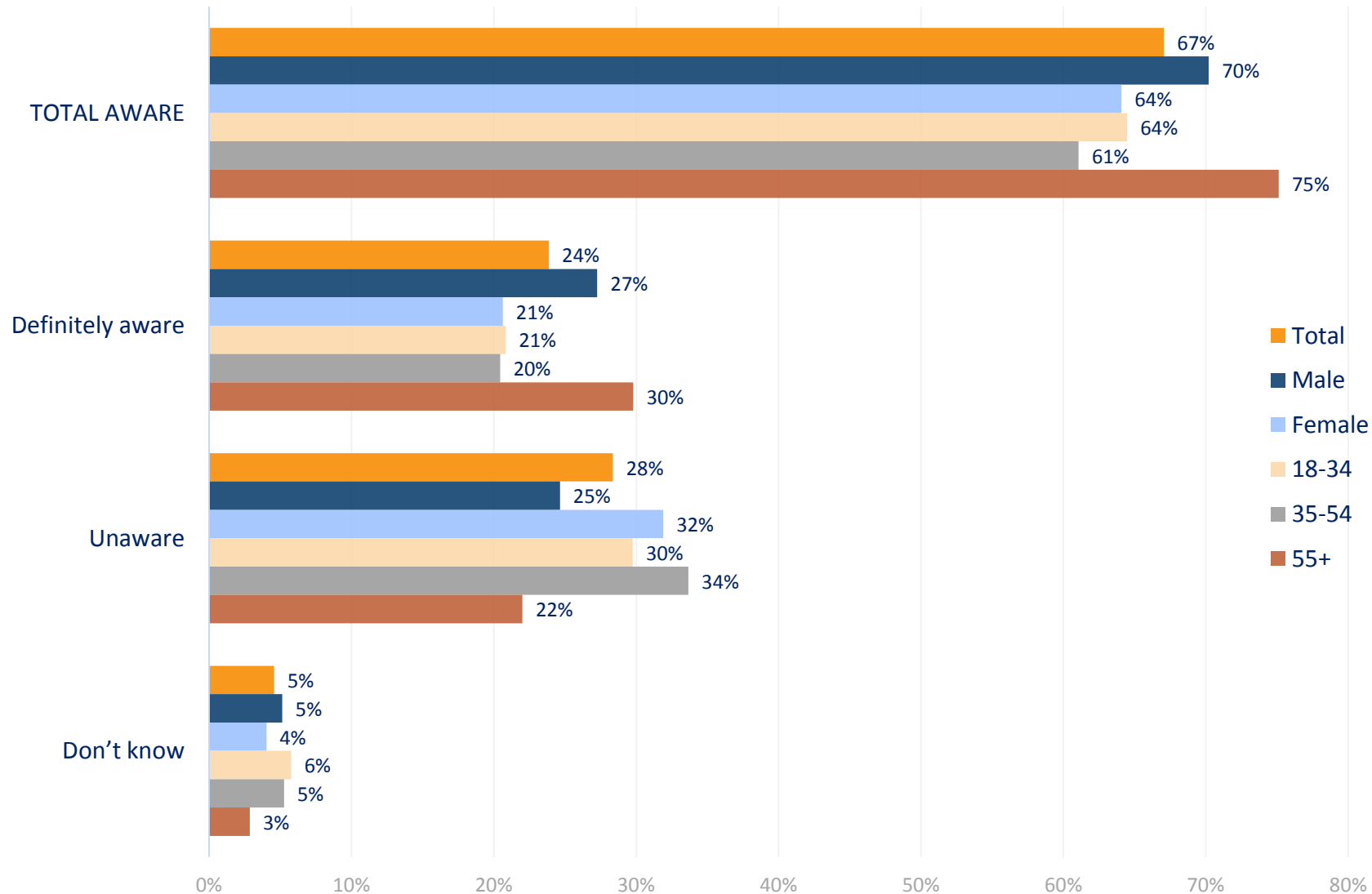
- Only a quarter of voters are 'definitely aware' (the more accurate measure here) of the size of the retail industry in Australia.
- One third of voters are unaware or 'don't know' that the retail sector accounts for over one million jobs.

Q5. Switching topics, 2016 Census figures show that the retail industry is the second largest by employment in Australia, providing over one million jobs to the country. Before today, to what extent were you aware that the retail sector employs over one million workers in Australia?

Awareness of Retail Sector Employment – Demographics



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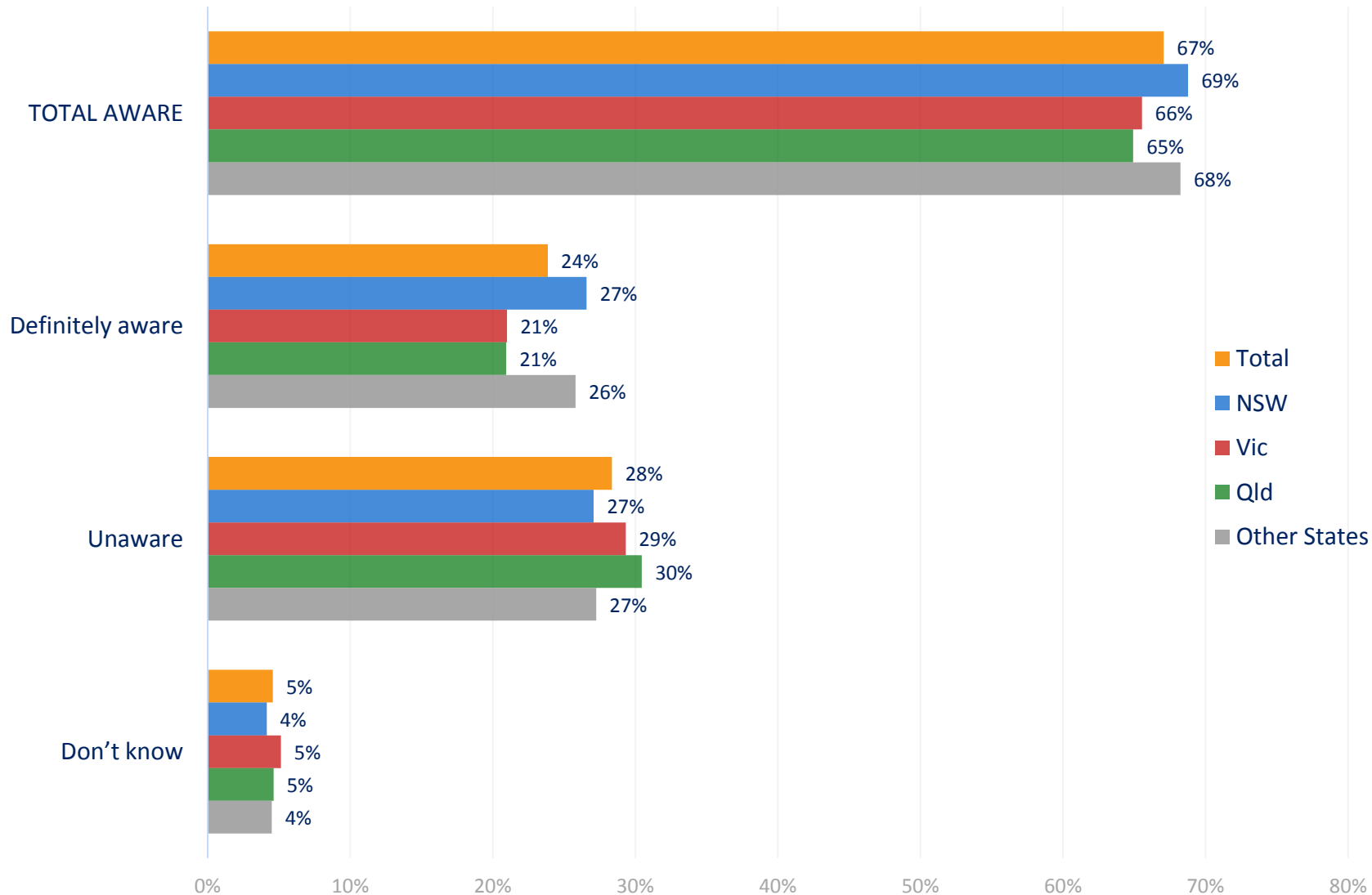
- Awareness of the number of retail jobs, tends to be higher among men than women and higher among older voters than younger voters.

Q5. Switching topics, 2016 Census figures show that the retail industry is the second largest by employment in Australia, providing over one million jobs to the country. Before today, to what extent were you aware that the retail sector employs over one million workers in Australia?

Awareness of Retail Sector Employment – State



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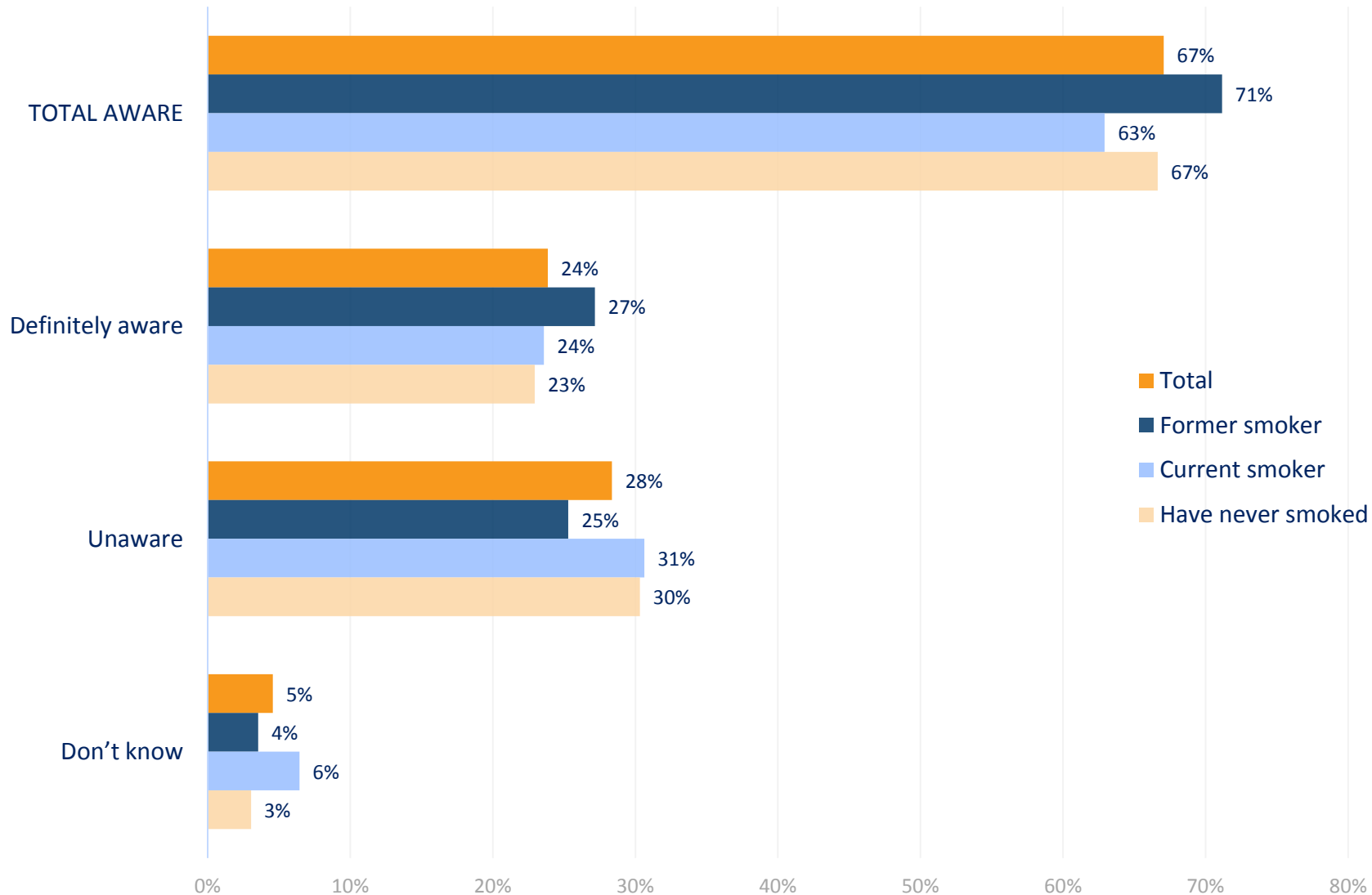
- No significant differences from the total at state level

Q5. Switching topics, 2016 Census figures show that the retail industry is the second largest by employment in Australia, providing over one million jobs to the country. Before today, to what extent were you aware that the retail sector employs over one million workers in Australia?

Awareness of Retail Sector Employment – Smoking segments



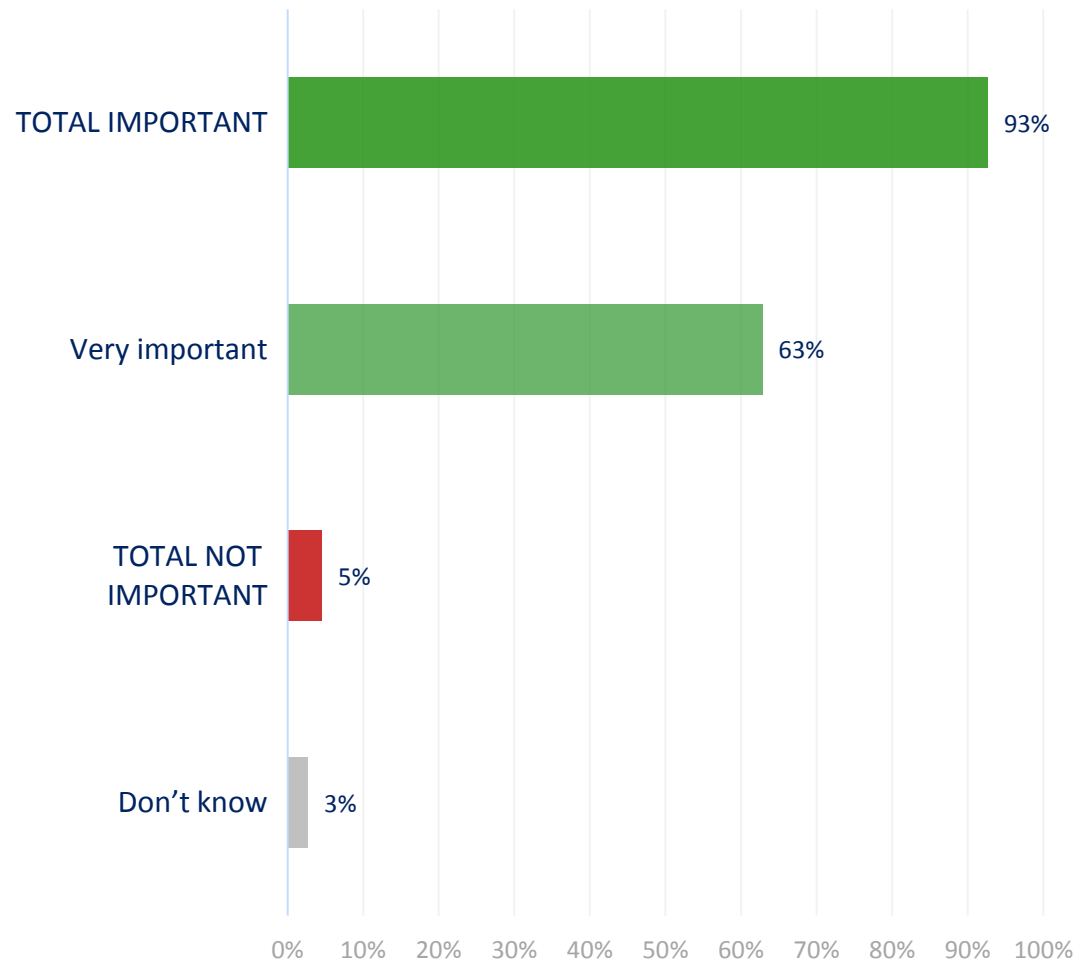
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- No significant differences from the total across the smoking segments

Q5. Switching topics, 2016 Census figures show that the retail industry is the second largest by employment in Australia, providing over one million jobs to the country. Before today, to what extent were you aware that the retail sector employs over one million workers in Australia?

Importance of Retail Sector



Q6. How important do you think the retail sector is to the Australian economy?



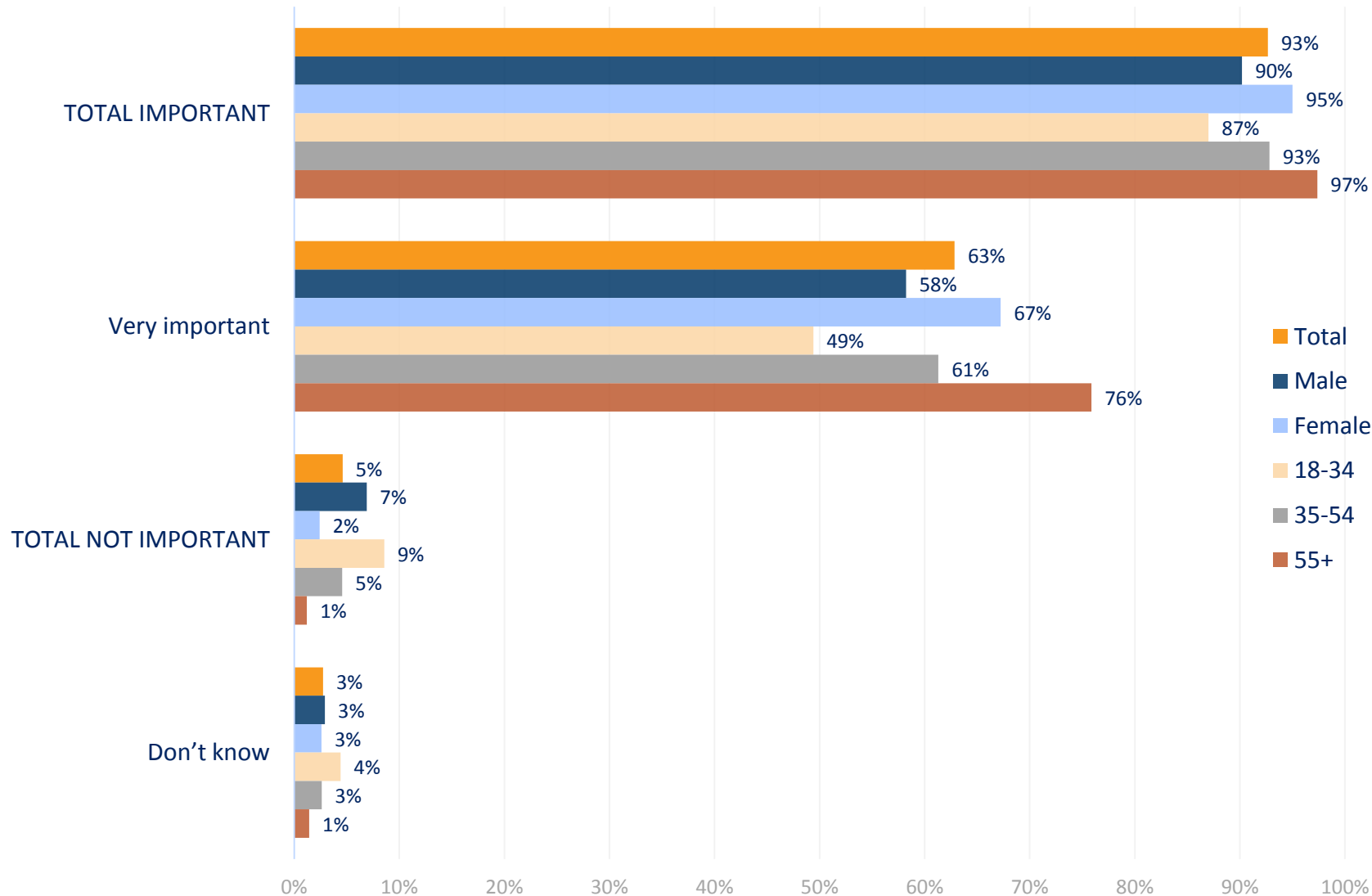
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- Although the awareness of the importance of the retail sector in terms of jobs is low, after being prompted on this, the vast majority of voters accept that the retail sector is important to the Australian economy.
- Nearly two-thirds of voters say it is 'very important'.

Importance of Retail Sector – Demographics



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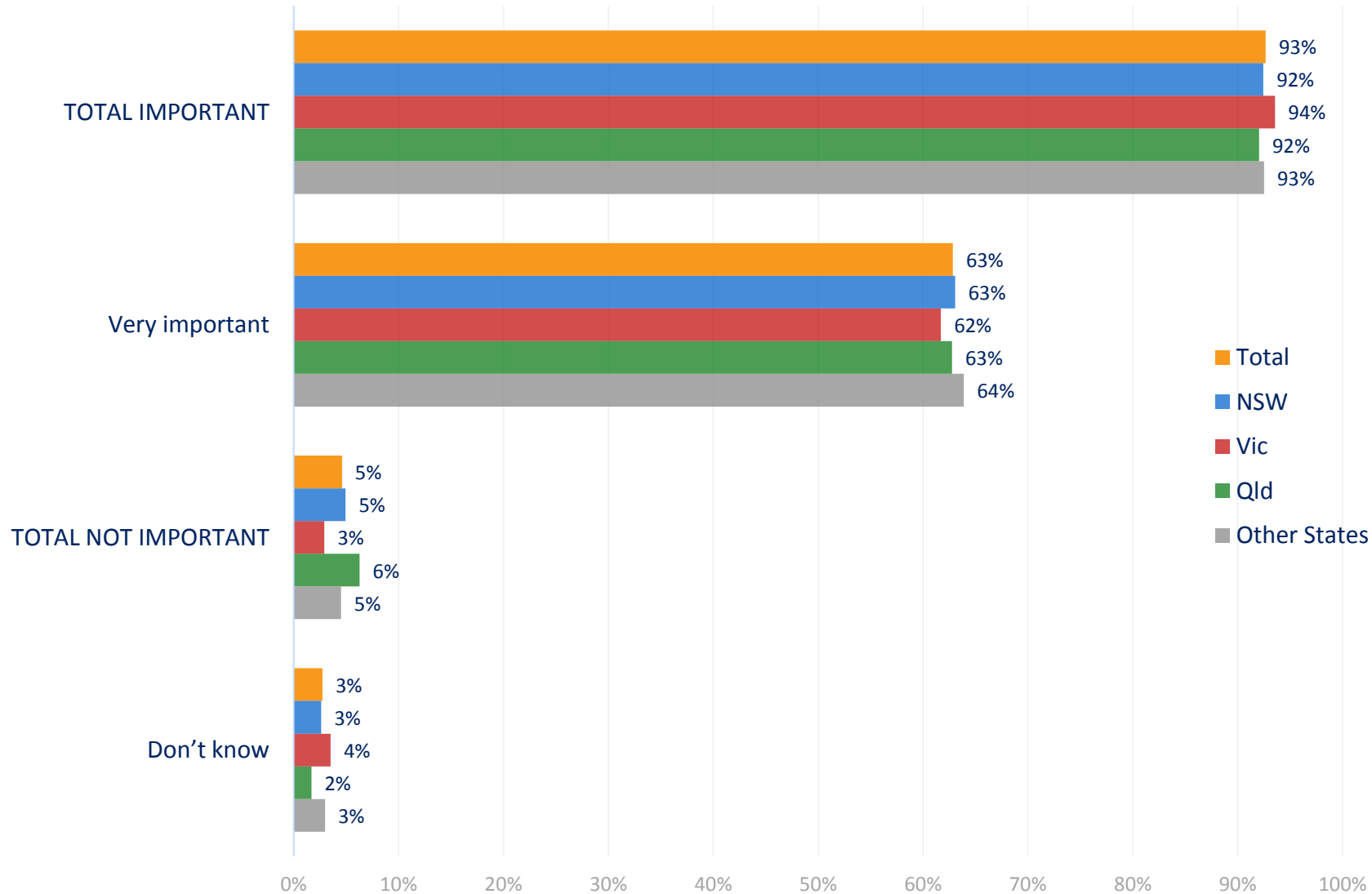
Q6. How important do you think the retail sector is to the Australian economy?

- Women are significantly more likely than men to consider the retail sector as important to the Australian economy.
- Older voters are significantly more likely than younger voters to rate the retail sector as important to the Australian economy.

Importance of Retail Sector – State



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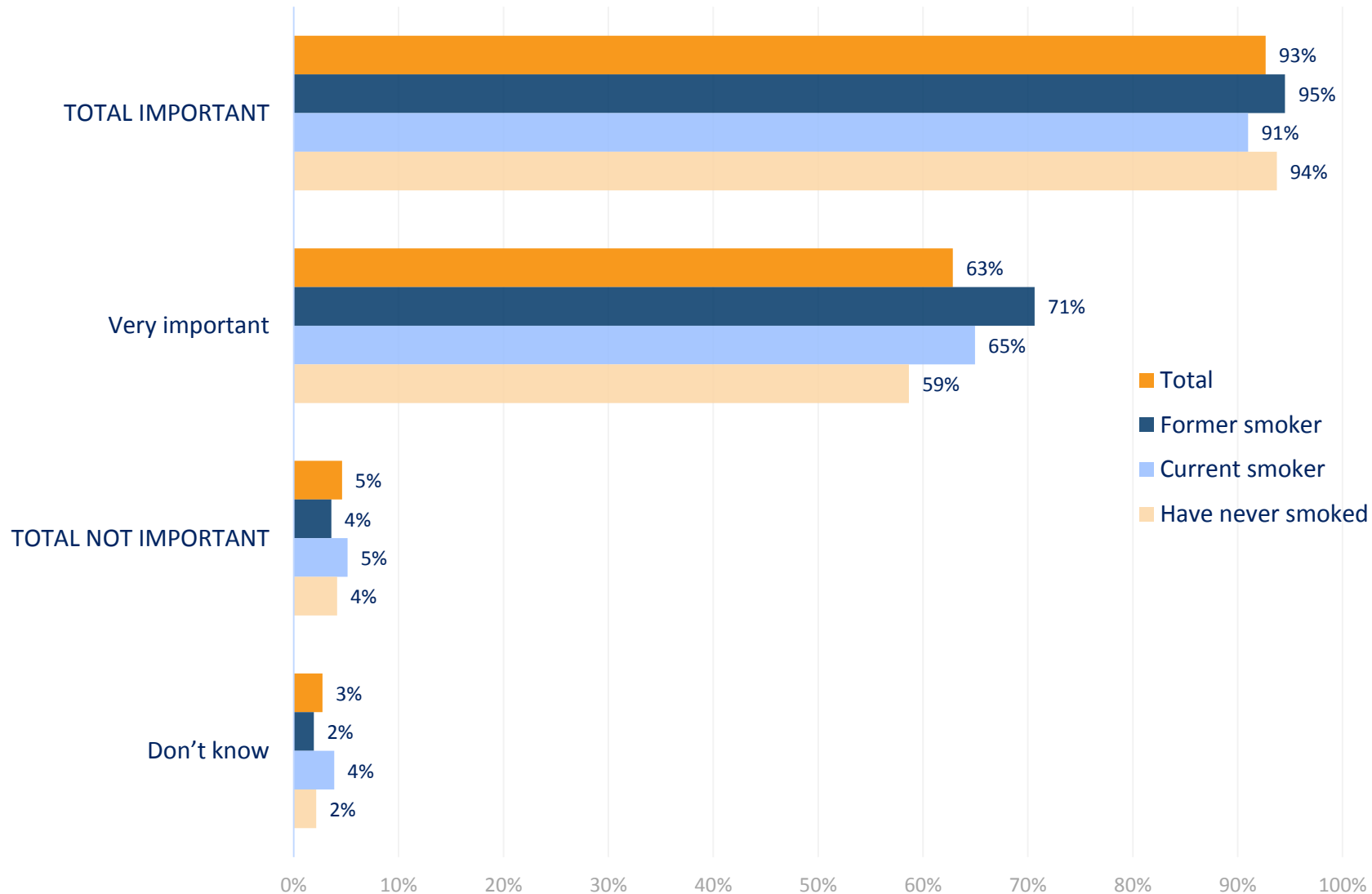
- No significant differences from the total at state level.

Q6. How important do you think the retail sector is to the Australian economy?

Importance of Retail Sector – Smoking segments



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- Differences between the smoking segments are marginal on this question.

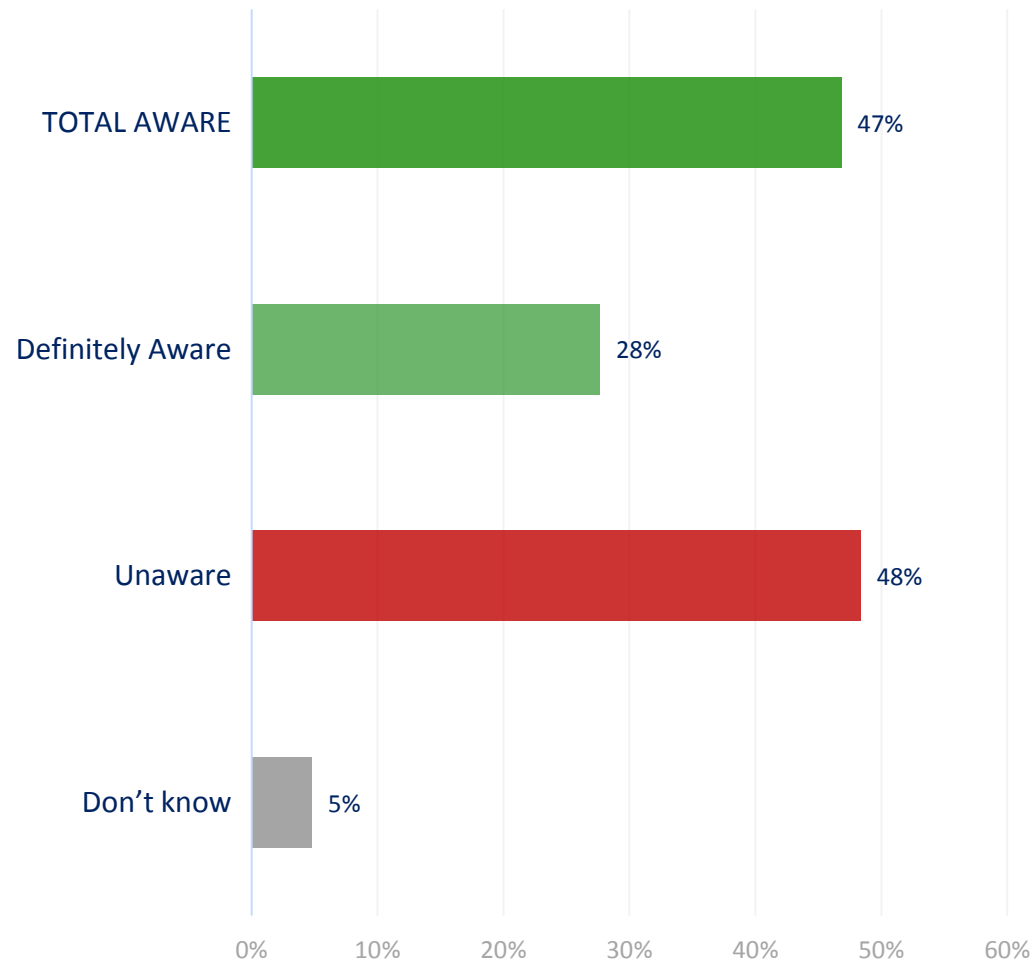
Q6. How important do you think the retail sector is to the Australian economy?



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E-Cigarette Awareness & Support

Vaporiser Illegality Awareness



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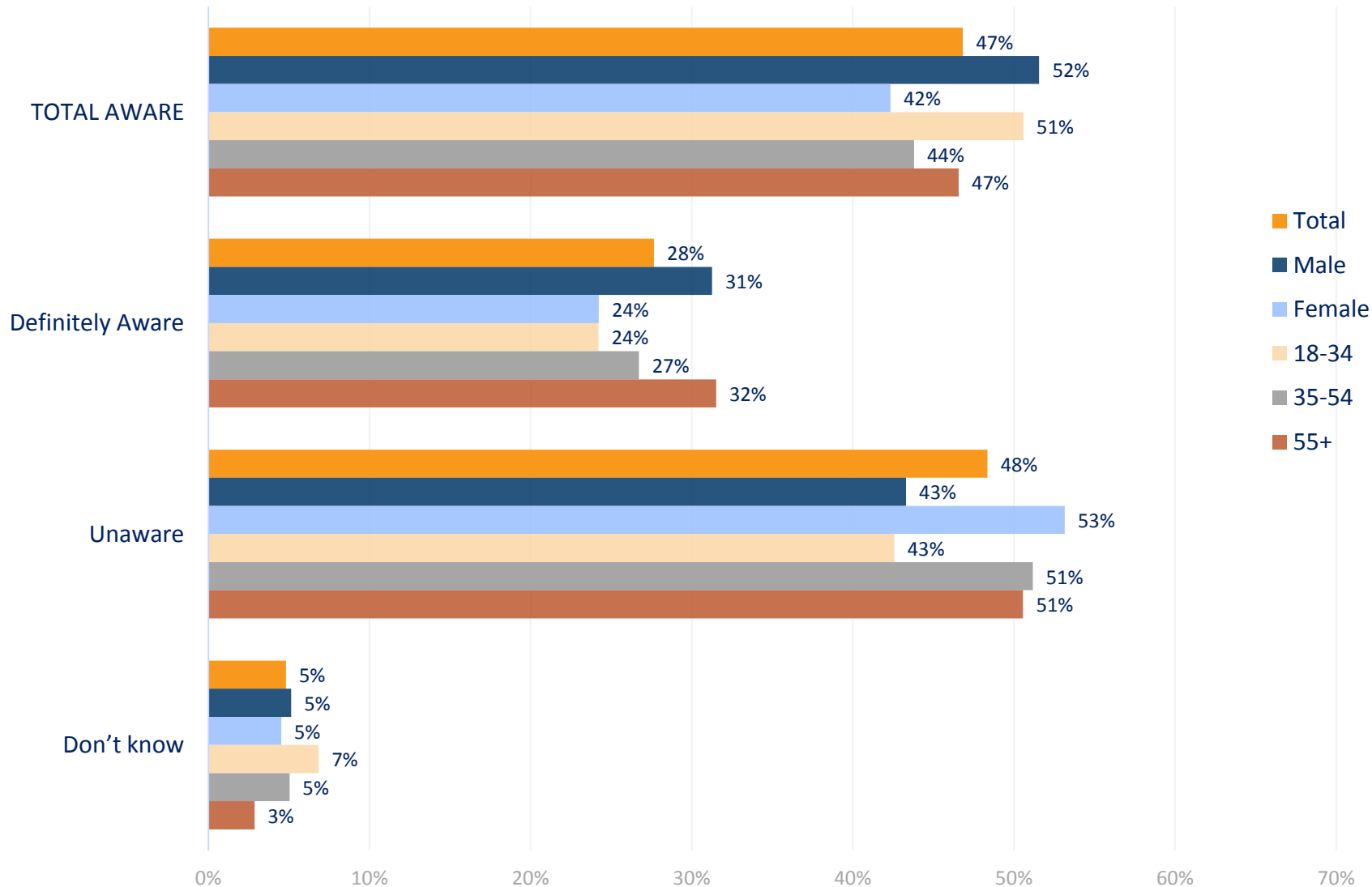
- Most Australians are unaware of, or don't know, that the sale and purchase of personal vaporisers is currently illegal in Australia.

Q8. Before today, to what extent were you aware that the sale and purchase of e-cigarettes, otherwise known as personal vaporisers, is currently illegal in Australia?

Vaporiser Illegality Awareness – Demographics



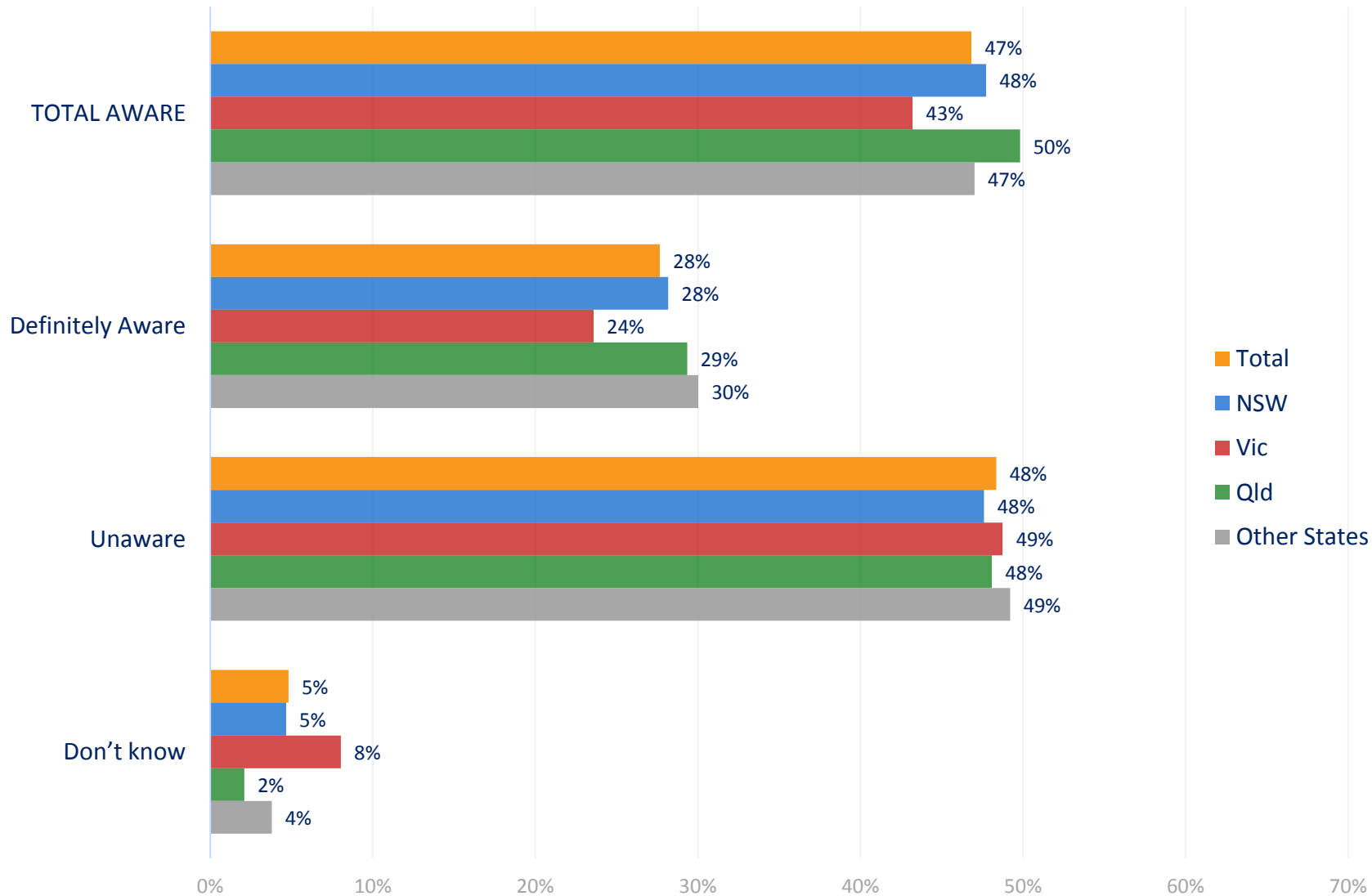
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- Male voters are significantly more aware than female voters that the sale and purchase of personal vaporisers is currently illegal in Australia
- Younger voters also appear to be more aware of this situation than older voters.

Q8. Before today, to what extent were you aware that the sale and purchase of e-cigarettes, otherwise known as personal vaporisers, is currently illegal in Australia?

Vaporiser Illegality Awareness – State



Q8. Before today, to what extent were you aware that the sale and purchase of e-cigarettes, otherwise known as personal vaporisers, is currently illegal in Australia?



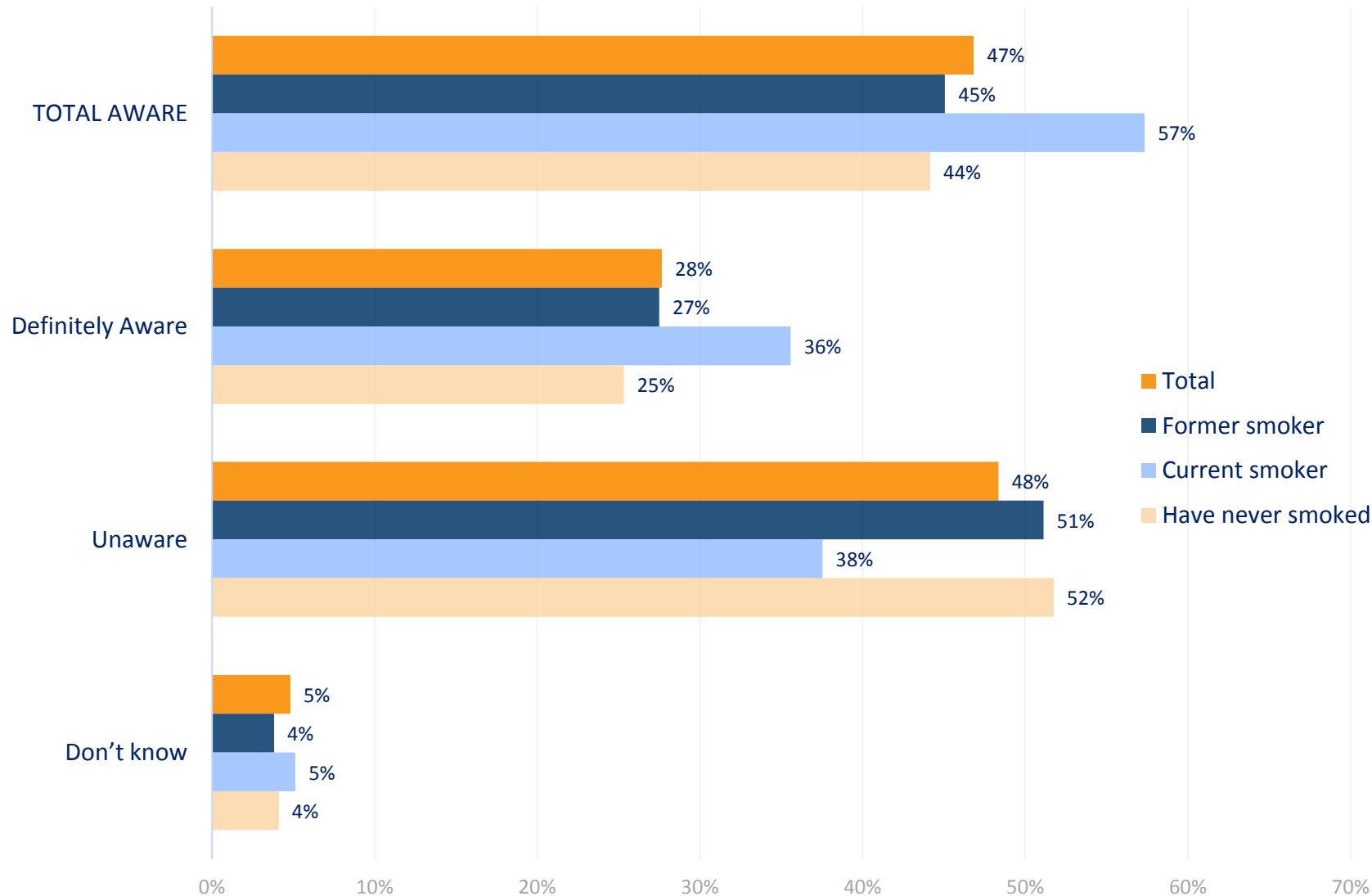
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- No significant differences from the total on a state-by-state basis.

Vaporiser Illegality Awareness – Smoking segments



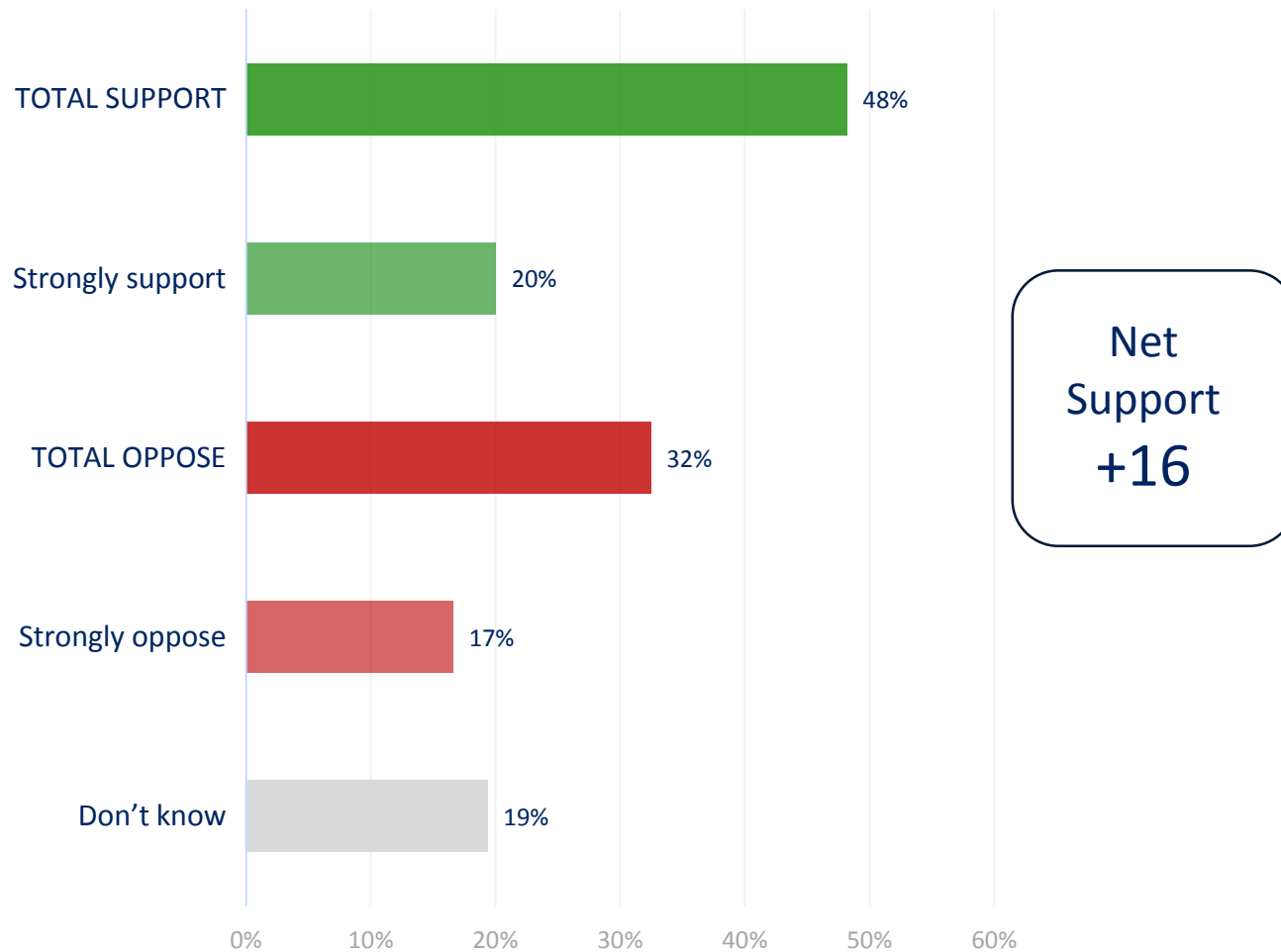
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- Current smokers are more likely to be aware that the sale and purchase of vaporisers is currently illegal in Australia, than former smokers and those who have never smoked.
- However, at 38% unaware and 5% unsure, even current smokers have relatively high levels of ignorance on this issue.

Q8. Before today, to what extent were you aware that the sale and purchase of e-cigarettes, otherwise known as personal vaporisers, is currently illegal in Australia?

Support for Legalising the Sale of Vaporisers



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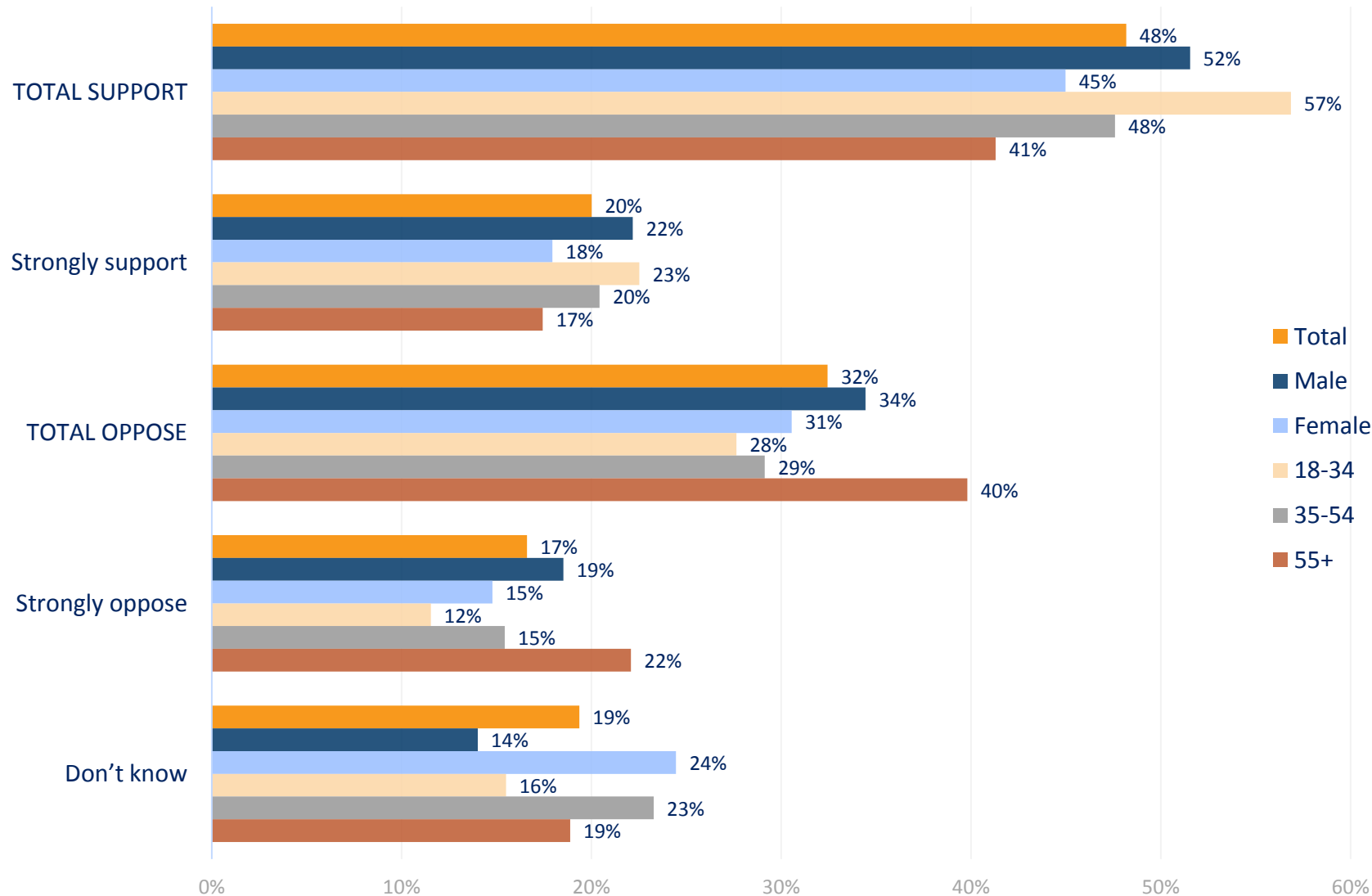
- Voters in Australia support legalising the sale and purchase of personal vaporisers, with +16 net support.
- One-fifth of voters strongly support legalisation.
- Another fifth of voters are unsure, showing there is opportunity to raise awareness of the health benefits of legalisation.

Q9. Just based on what you know now, to what extent do you support or oppose legalising the sale and purchase of personal vaporisers in Australia?

Support for Legalising Vaporisers – Demographics



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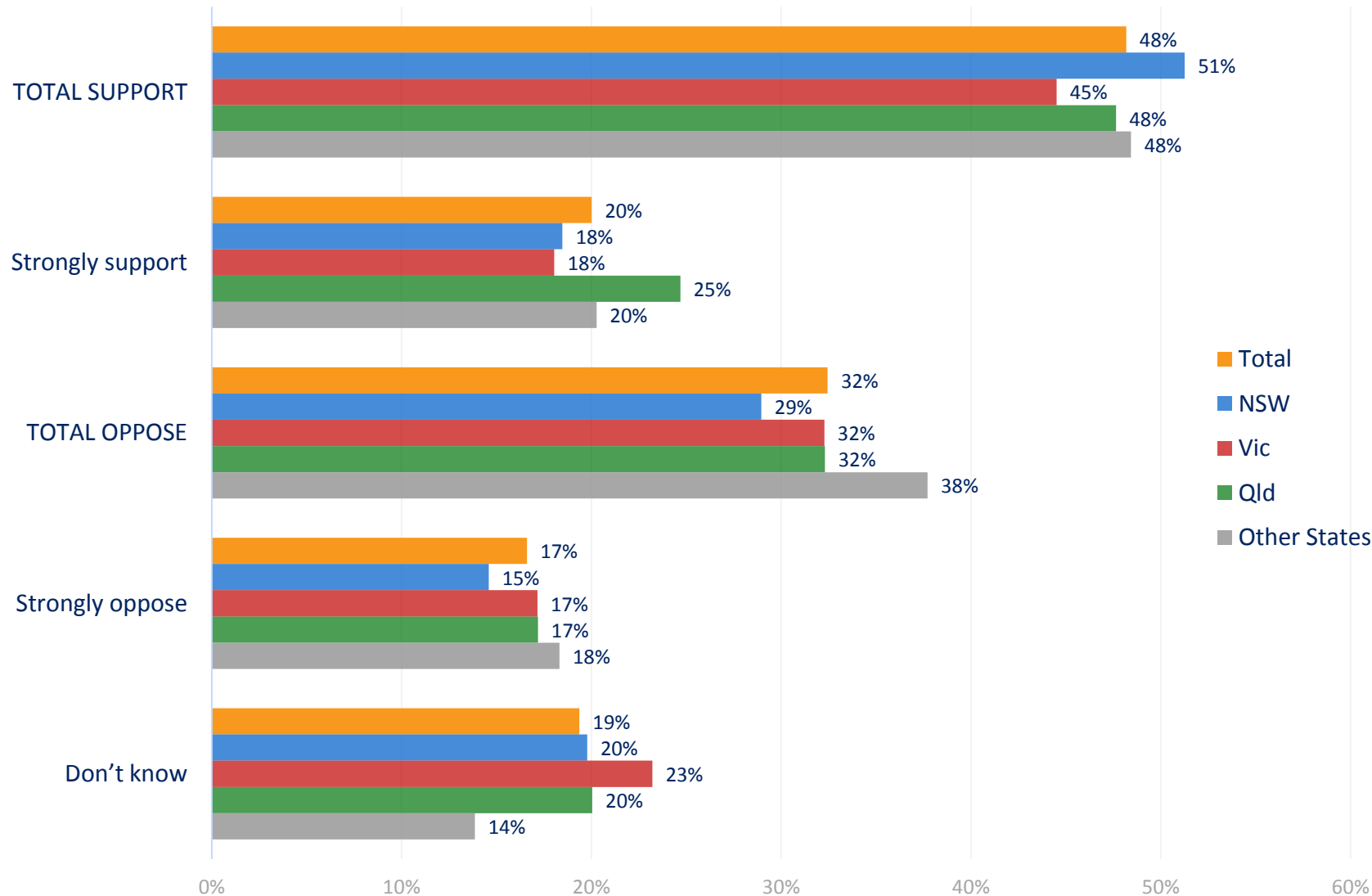
- Support for legalisation is higher among men than women, and higher among younger voters than older voters.

Q9. Just based on what you know now, to what extent do you support or oppose legalising the sale and purchase of personal vaporisers in Australia?

Support for Legalising Vaporisers – State



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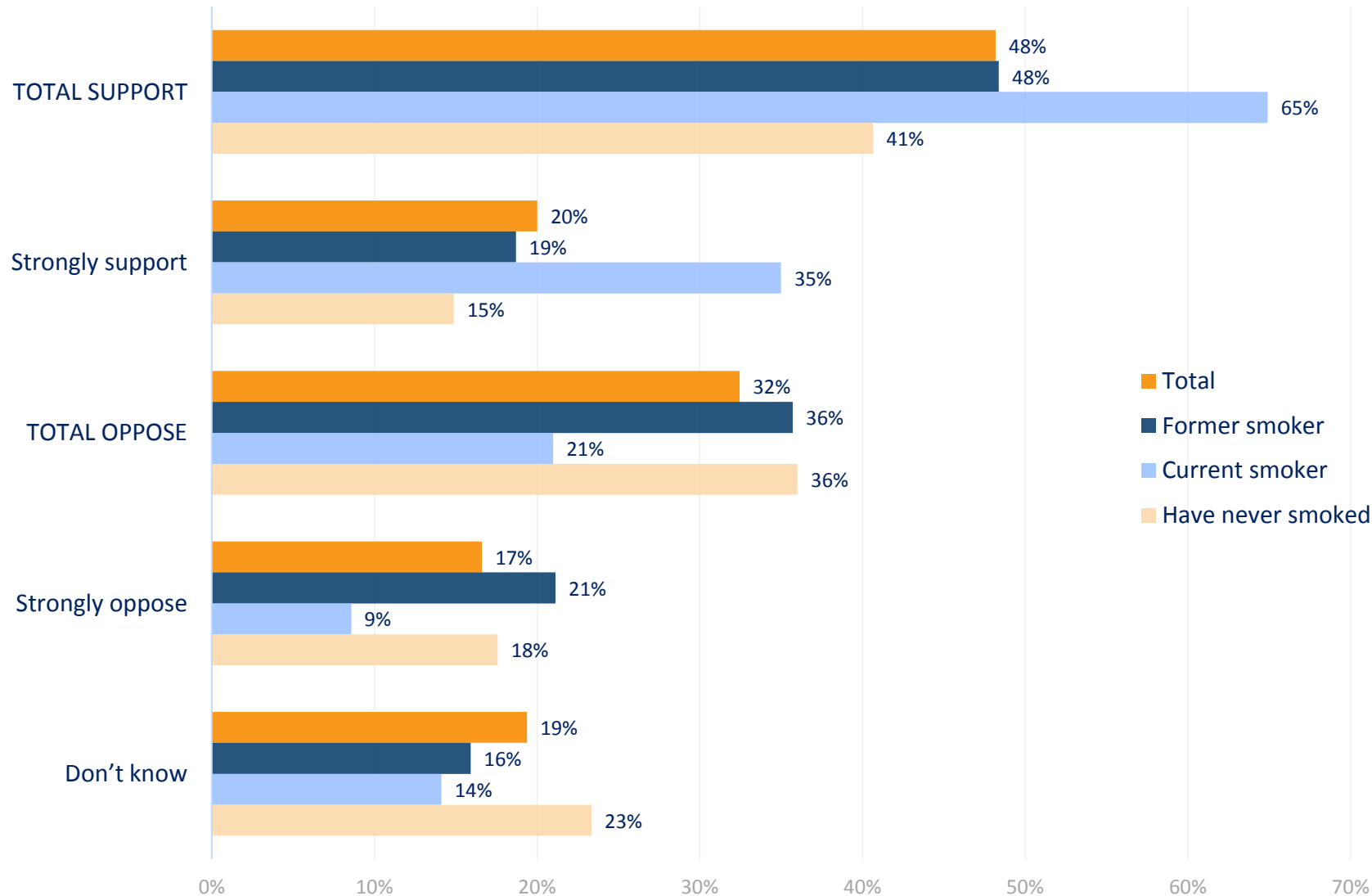
- There is little difference in support for legalisation on a state-by-state basis.

Q9. Just based on what you know now, to what extent do you support or oppose legalising the sale and purchase of personal vaporisers in Australia?

Support for Legalising Vaporisers – Smoking segments



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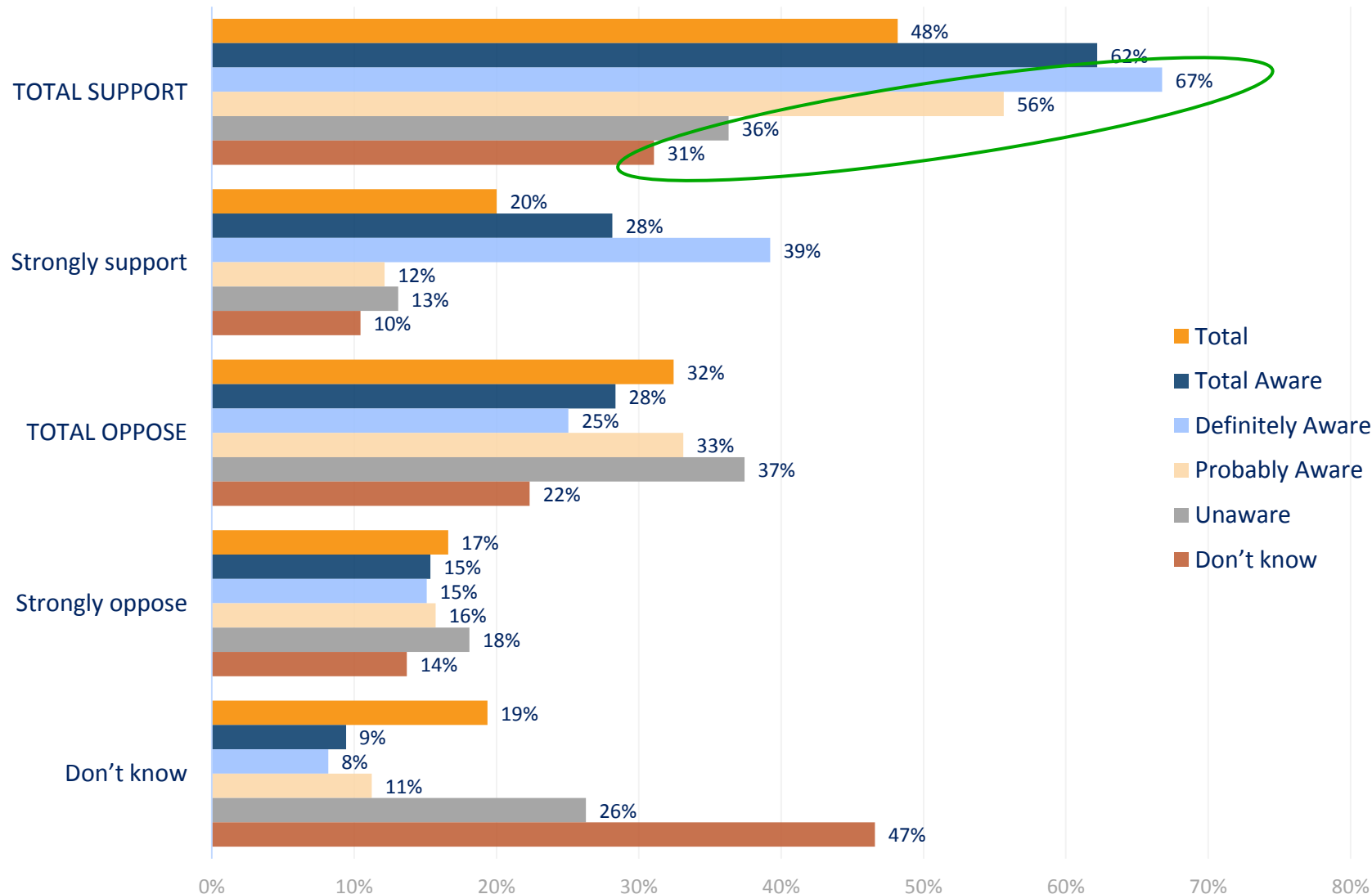
- Current smokers are significantly more likely to support – and less likely to oppose – legalising the sale and purchase of personal vaporisers in Australia.

Q9. Just based on what you know now, to what extent do you support or oppose legalising the sale and purchase of personal vaporisers in Australia?

Support for Legalising Vaporisers – Illegality Awareness



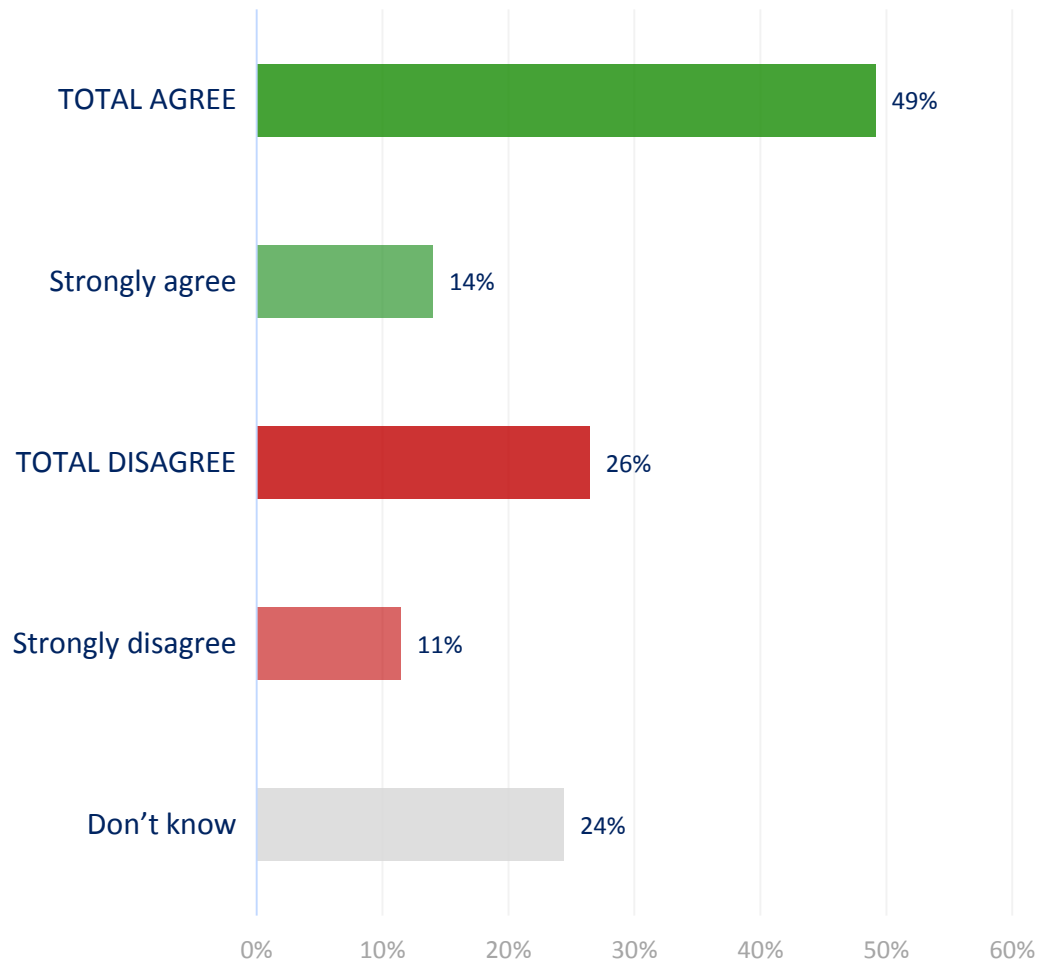
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- Support for the legalisation of vaporisers can be broken down by awareness of their illegality.
- These results show that people who are aware they are illegal are more likely to support legalisation.
- This indicates that efforts undertaken to increase awareness are likely to boost support.
- Indeed those that are definitely aware are more than twice as likely to strongly support the legalisation of vaporisers – relative to those who are unsure.

Q9. Just based on what you know now, to what extent do you support or oppose legalising the sale and purchase of personal vaporisers in Australia?

Agreement that Vaping is Less Harmful



Q10. Just based on what you know now, to what extent do you agree or disagree that vaping – that is, using a personal vaporiser – is less harmful than smoking normal cigarettes?



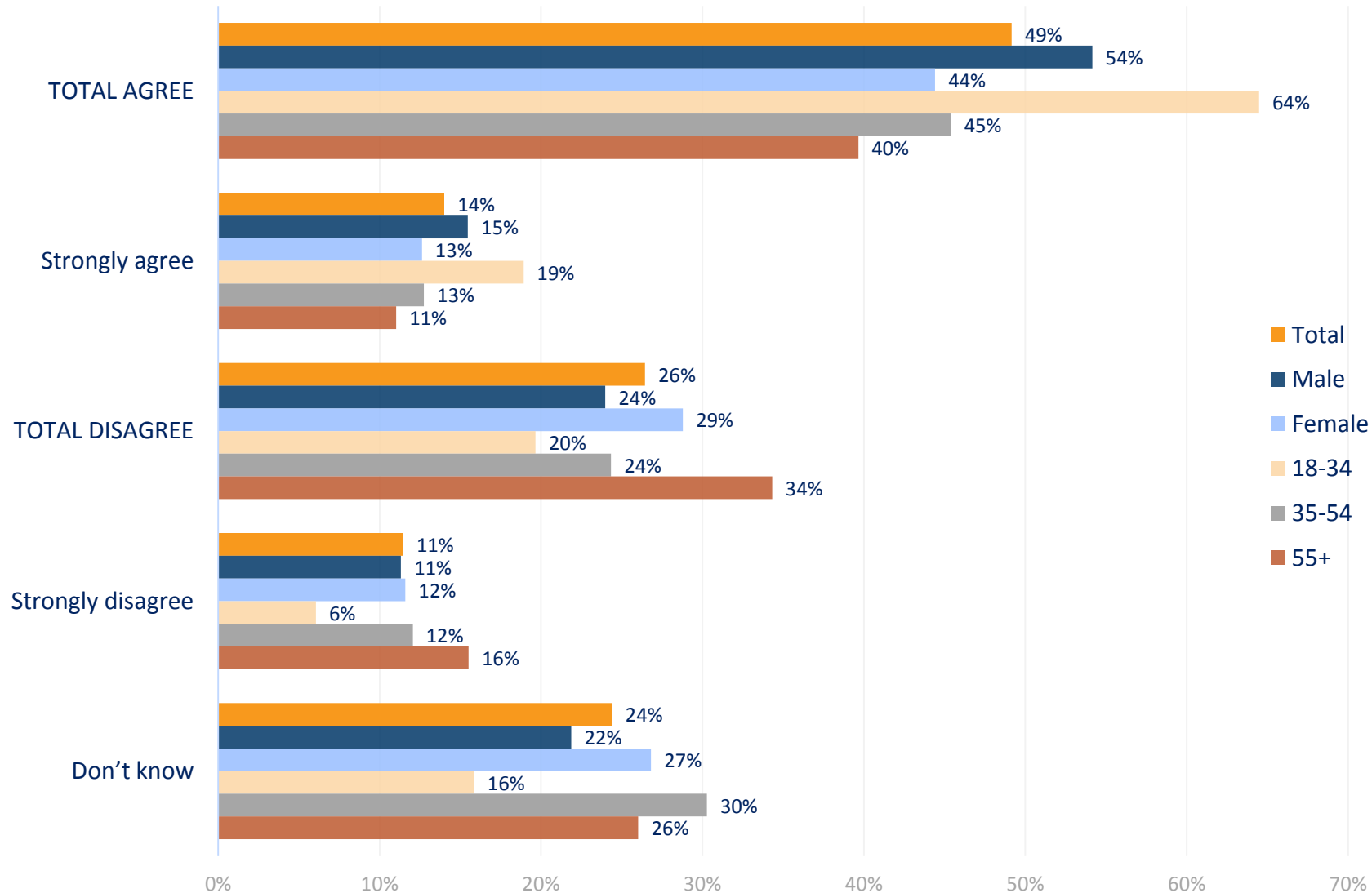
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- Nearly half of voters agree using a personal vaporiser is less harmful than smoking normal cigarettes.
- However, a quarter of voters are unsure, with a further quarter saying vaporisers are not less harmful, showing a need to raise awareness of the science around health benefits of vaporisers for smokers.

Agreement that Vaping is Less Harmful – Demographics



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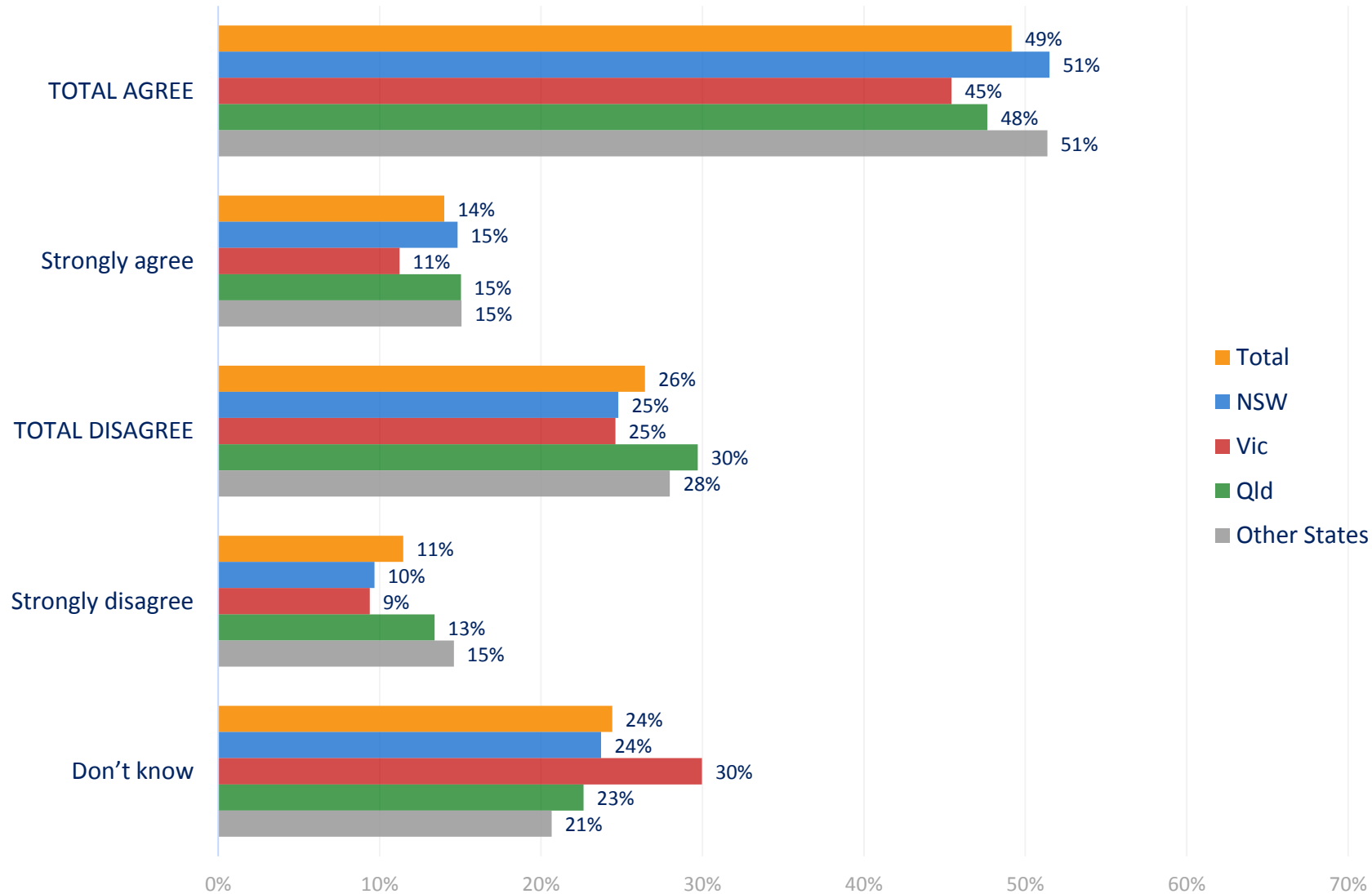
- Male voters are significantly more likely than female voters to agree that vaping is less harmful than smoking normal cigarettes.
- Likewise younger voters are significantly more likely than older voters to agree that vaping is less harmful than normal cigarettes.
- It is clear that men and younger people are key target groups in any campaign to legalise the sale and purchase of vaporisers.

Q10. Just based on what you know now, to what extent do you agree or disagree that vaping – that is, using a personal vaporiser – is less harmful than smoking normal cigarettes?

Agreement that Vaping is Less Harmful – State



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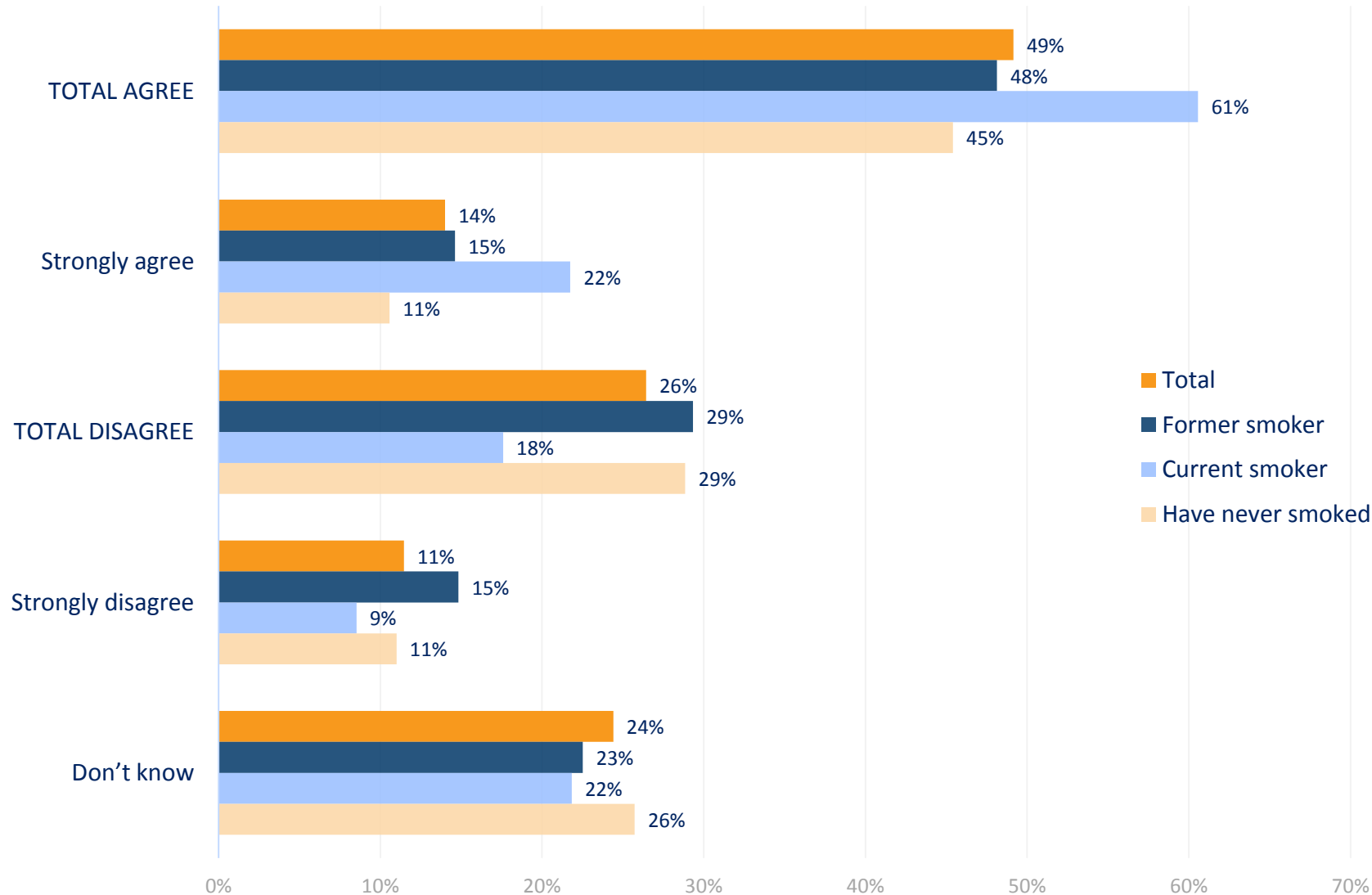
- No significant differences.

Q10. Just based on what you know now, to what extent do you agree or disagree that vaping – that is, using a personal vaporiser – is less harmful than smoking normal cigarettes?

Agreement that Vaping is Less Harmful – Smoking segments



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- Current smokers are much more likely to agree that vaping is less harmful than using normal cigarettes.

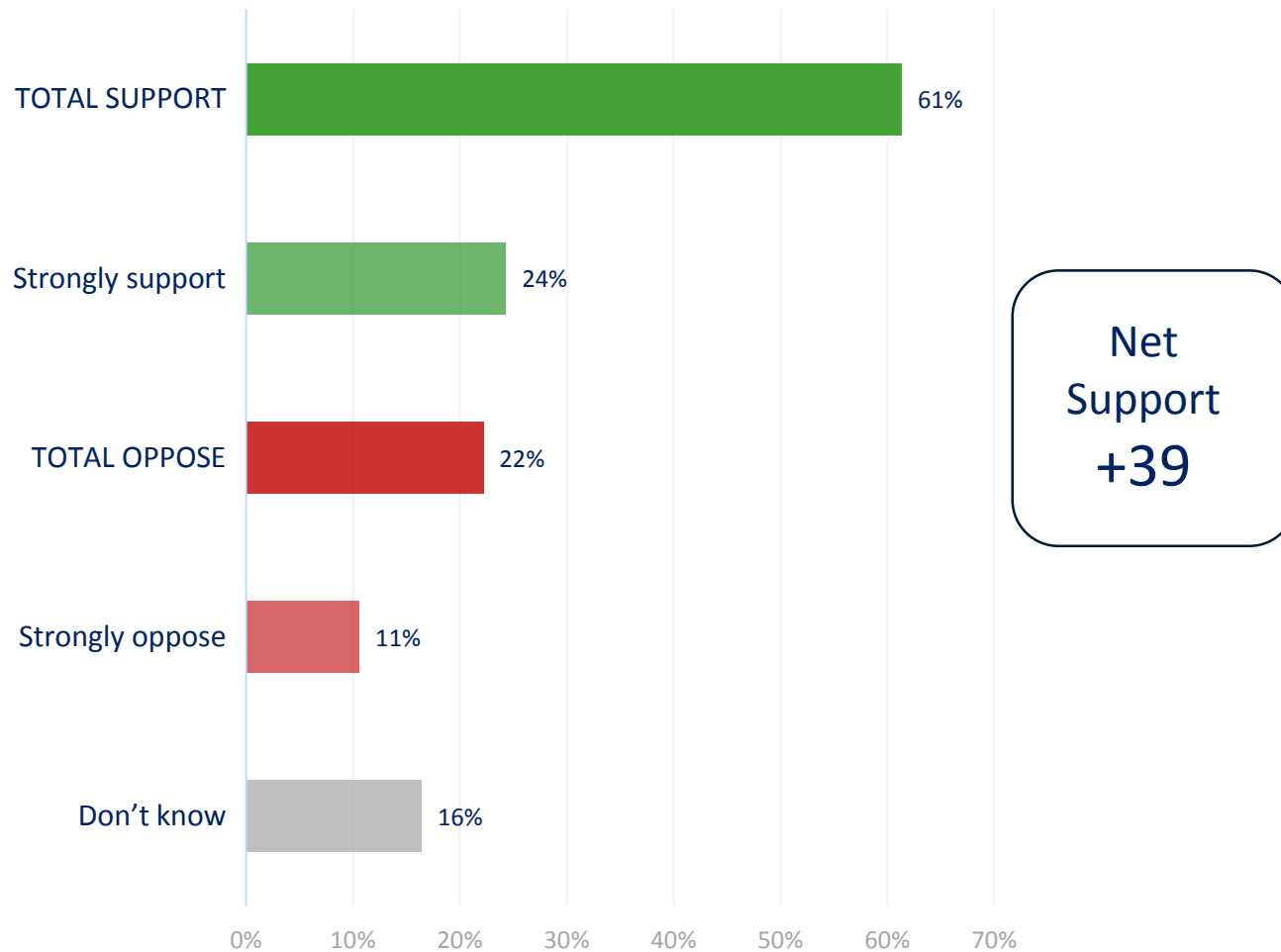
Q10. Just based on what you know now, to what extent do you agree or disagree that vaping – that is, using a personal vaporiser – is less harmful than smoking normal cigarettes?



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Support for E-Cigarette Availability

Support for Vaporisers at Retail



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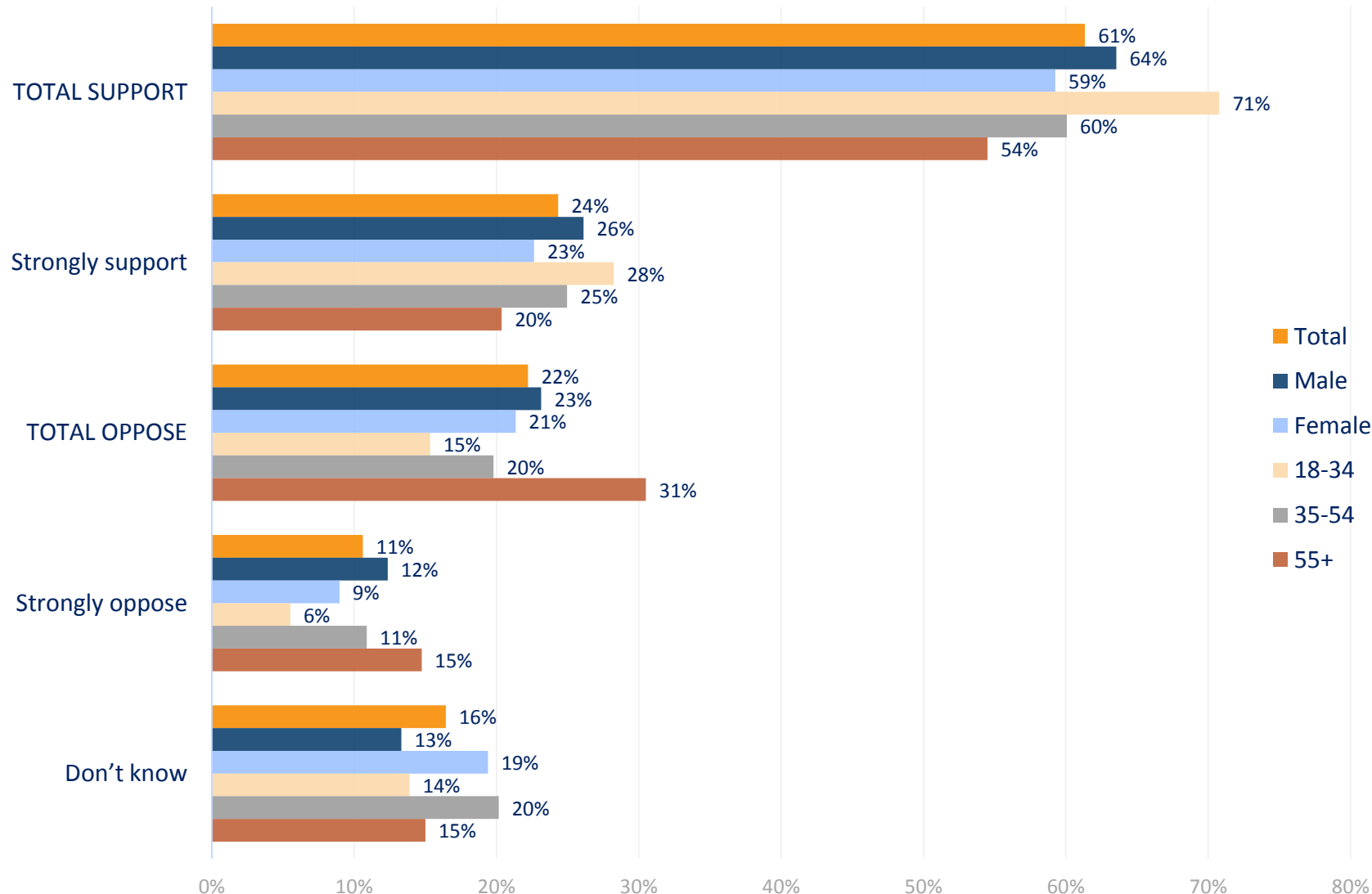
- Nearly two-thirds of Australian voters support making personal vaporisers and other less harmful alternatives available alongside cigarettes.
- A quarter of voters strongly support this proposal, with net support at +39.

Q11. In Australia today, cigarettes are currently available for sale and purchase across the country at retailers such as the local small grocer in your community. To what extent would you support or oppose the Government regulating to make personal vaporisers, and other less harmful alternatives, available alongside cigarettes at retail so smokers have access to these products?

Support for Vaporisers at Retail – Demographics



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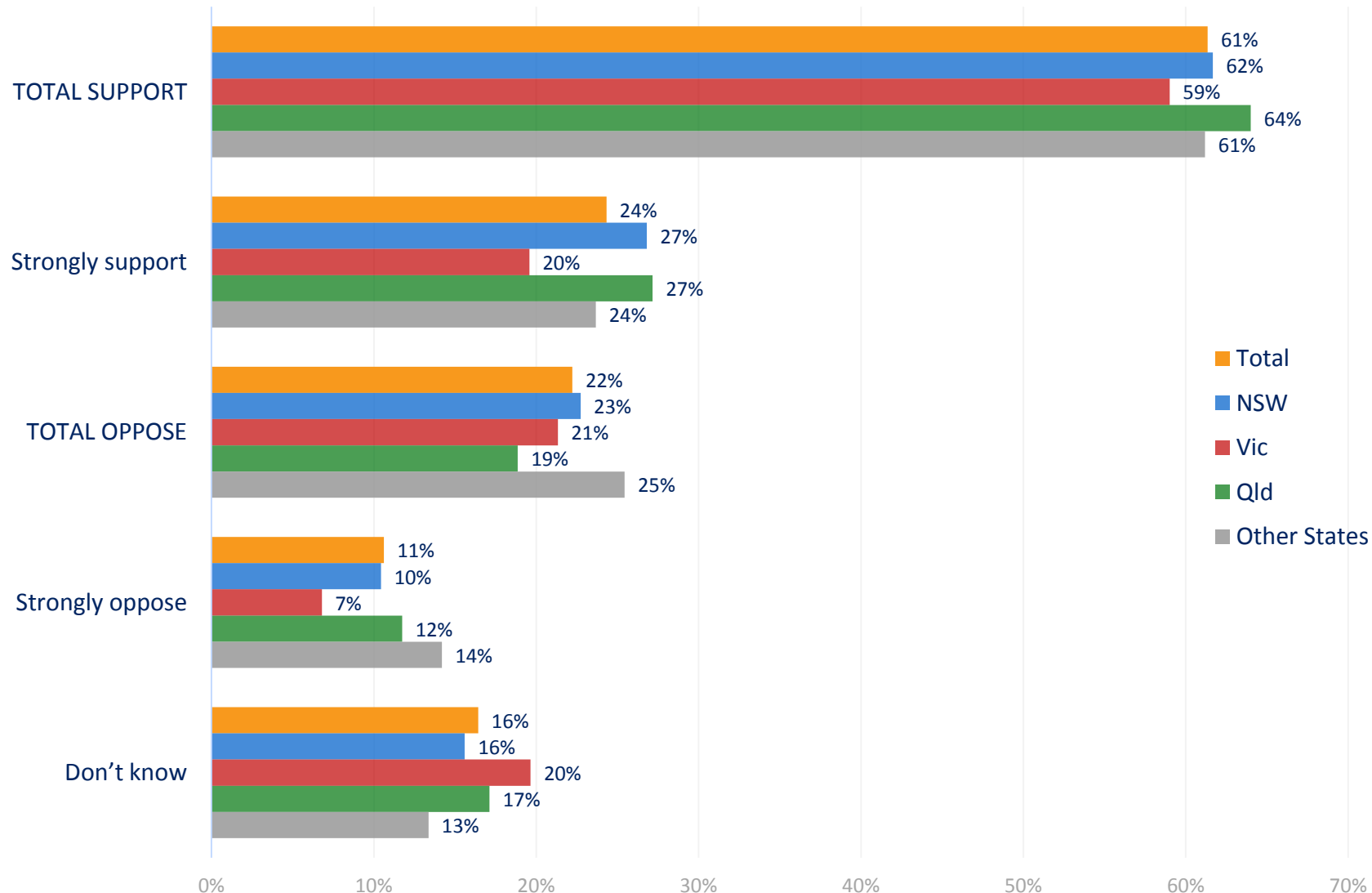
- Support for the availability of vaporisers at retail is significantly higher among younger voters than older voters, with 71% of younger voters (18-34 years) supportive of the proposal.

Q11. In Australia today, cigarettes are currently available for sale and purchase across the country at retailers such as the local small grocer in your community. To what extent would you support or oppose the Government regulating to make personal vaporisers, and other less harmful alternatives, available alongside cigarettes at retail so smokers have access to these products?

Support for Vaporisers at Retail – State



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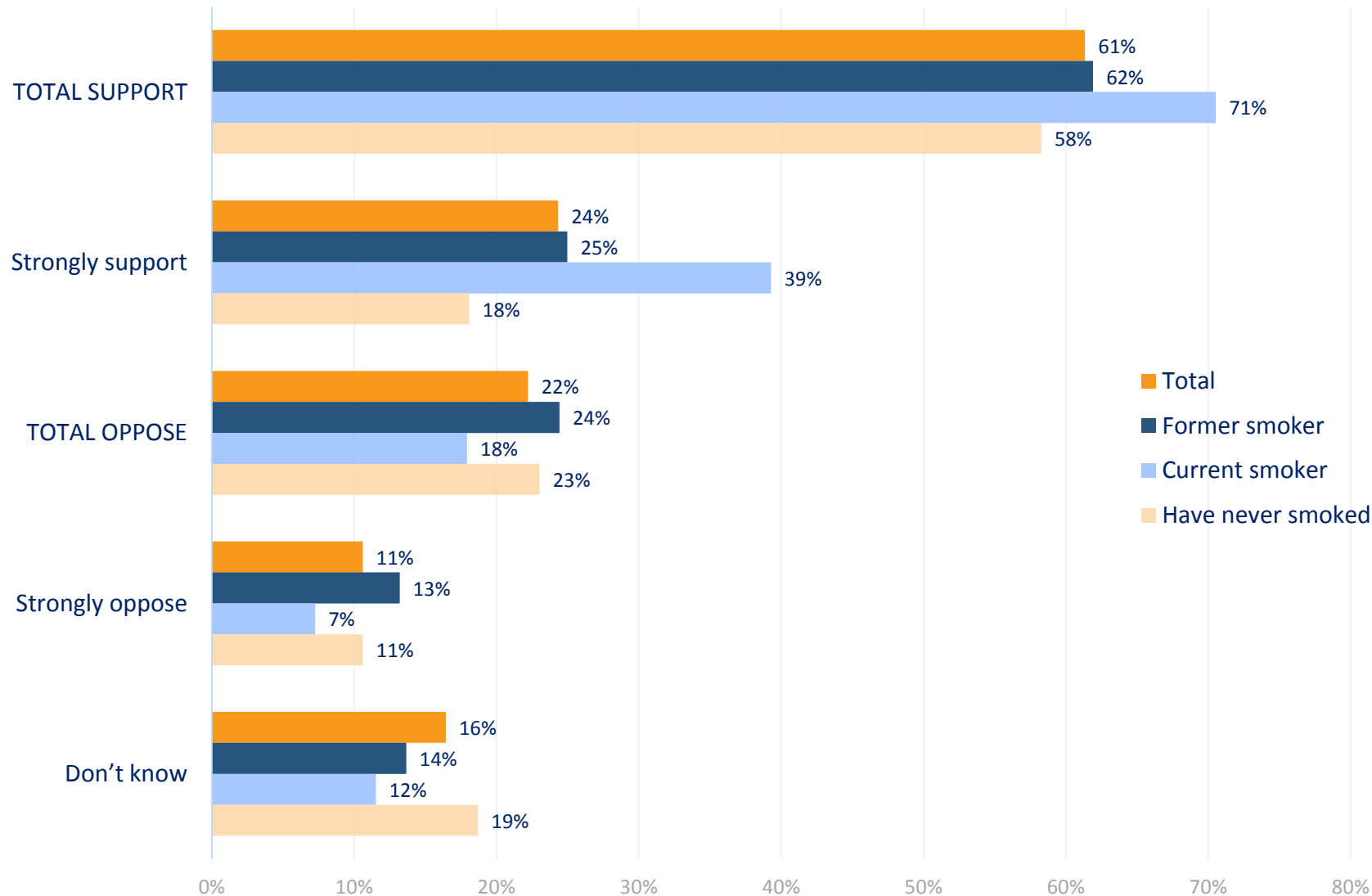
- No significant differences from the total at state level.

Q11. In Australia today, cigarettes are currently available for sale and purchase across the country at retailers such as the local small grocer in your community. To what extent would you support or oppose the Government regulating to make personal vaporisers, and other less harmful alternatives, available alongside cigarettes at retail so smokers have access to these products?

Support for Vaporisers at Retail – Smoking segments



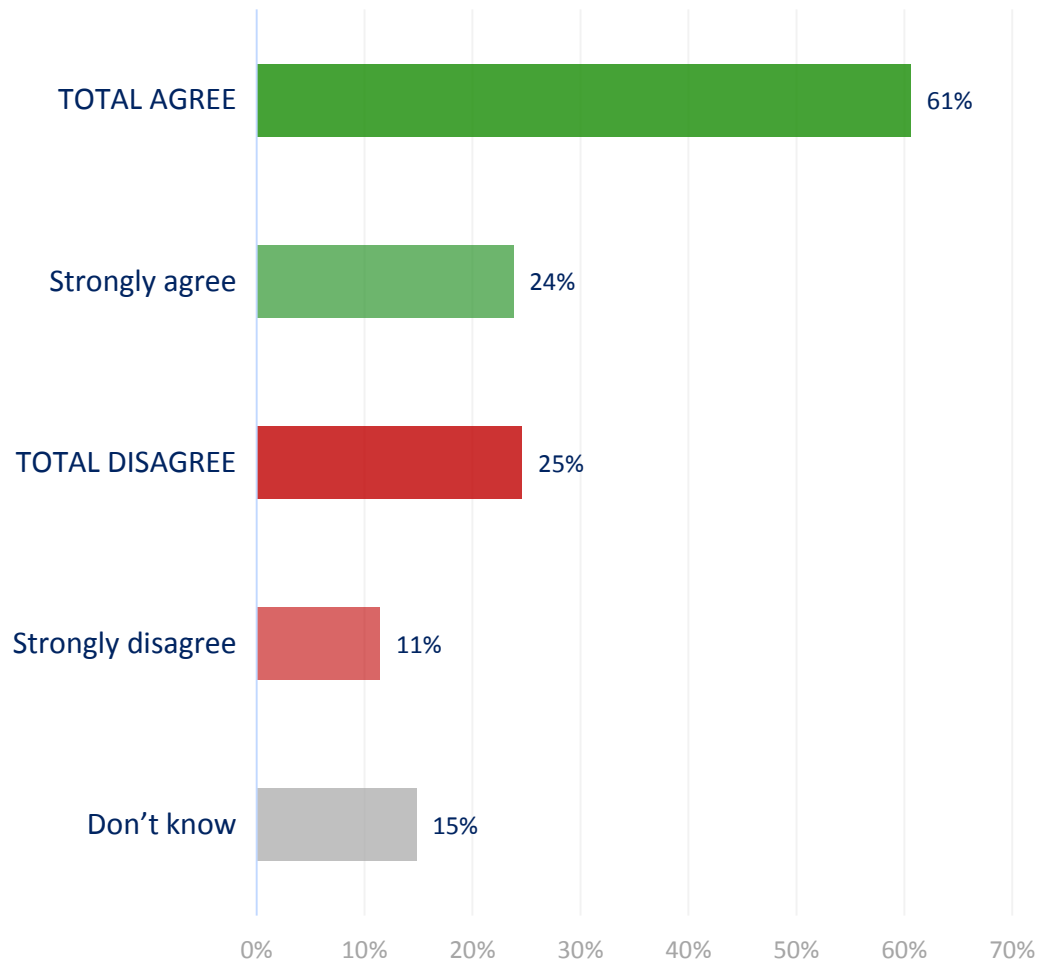
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- Support for the availability of vaporisers at retail is significantly stronger among current smokers than it is among those who have never smoked.

Q11. In Australia today, cigarettes are currently available for sale and purchase across the country at retailers such as the local small grocer in your community. To what extent would you support or oppose the Government regulating to make personal vaporisers, and other less harmful alternatives, available alongside cigarettes at retail so smokers have access to these products?

Agreement with Easing of Regulations



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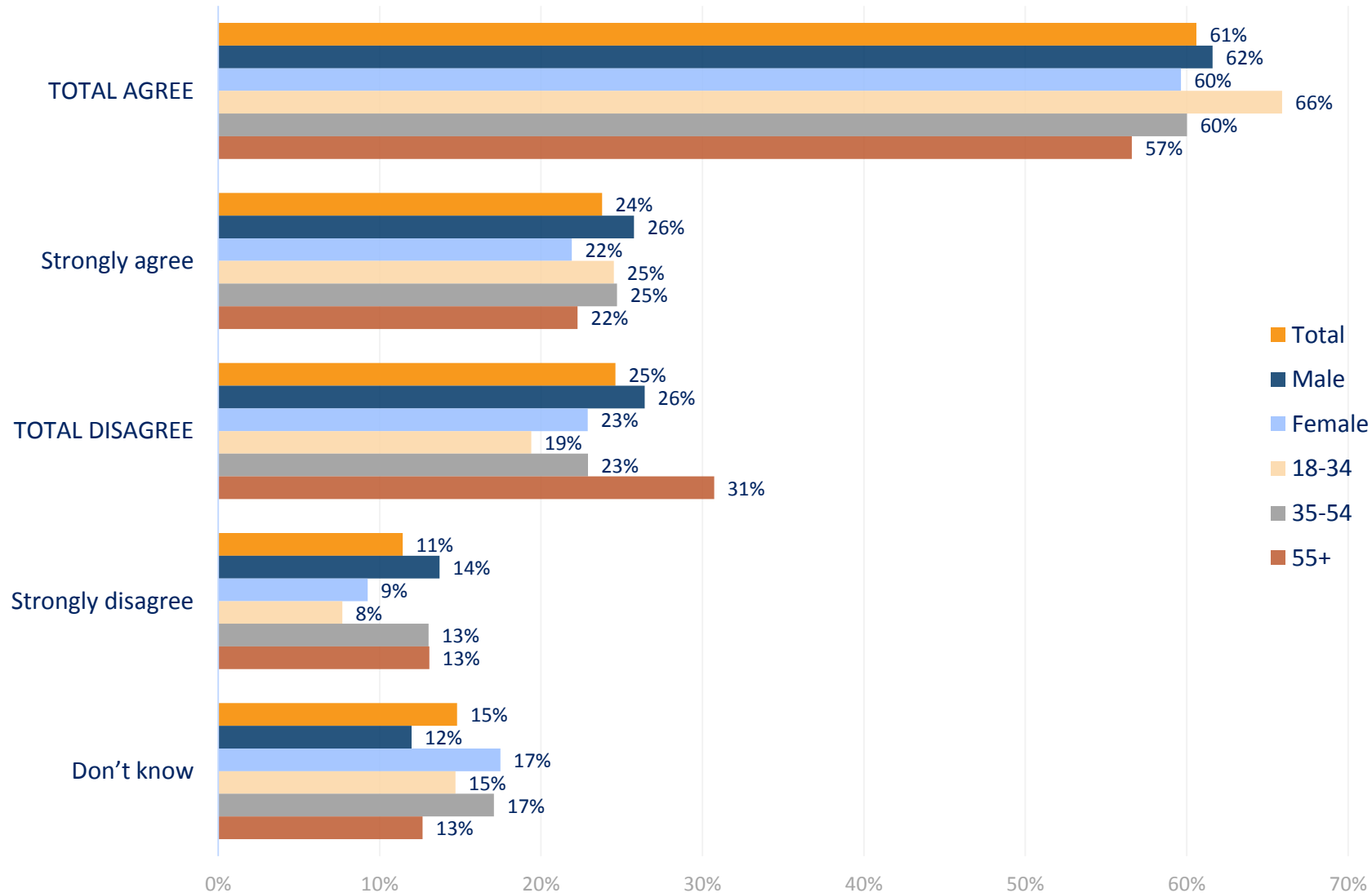
- A significant majority of Australian voters agree that the Government should ease regulations on new, less harmful alternatives, to cigarettes to encourage adult smokers to fully switch to these products.

Q12. To what extent do you agree or disagree that the Government should ease regulations, including lowering restrictions and taxes, on new less harmful alternatives to cigarettes in order to encourage adult smokers to fully switch to these products?

Agreement with Easing of Regulations – Demographics



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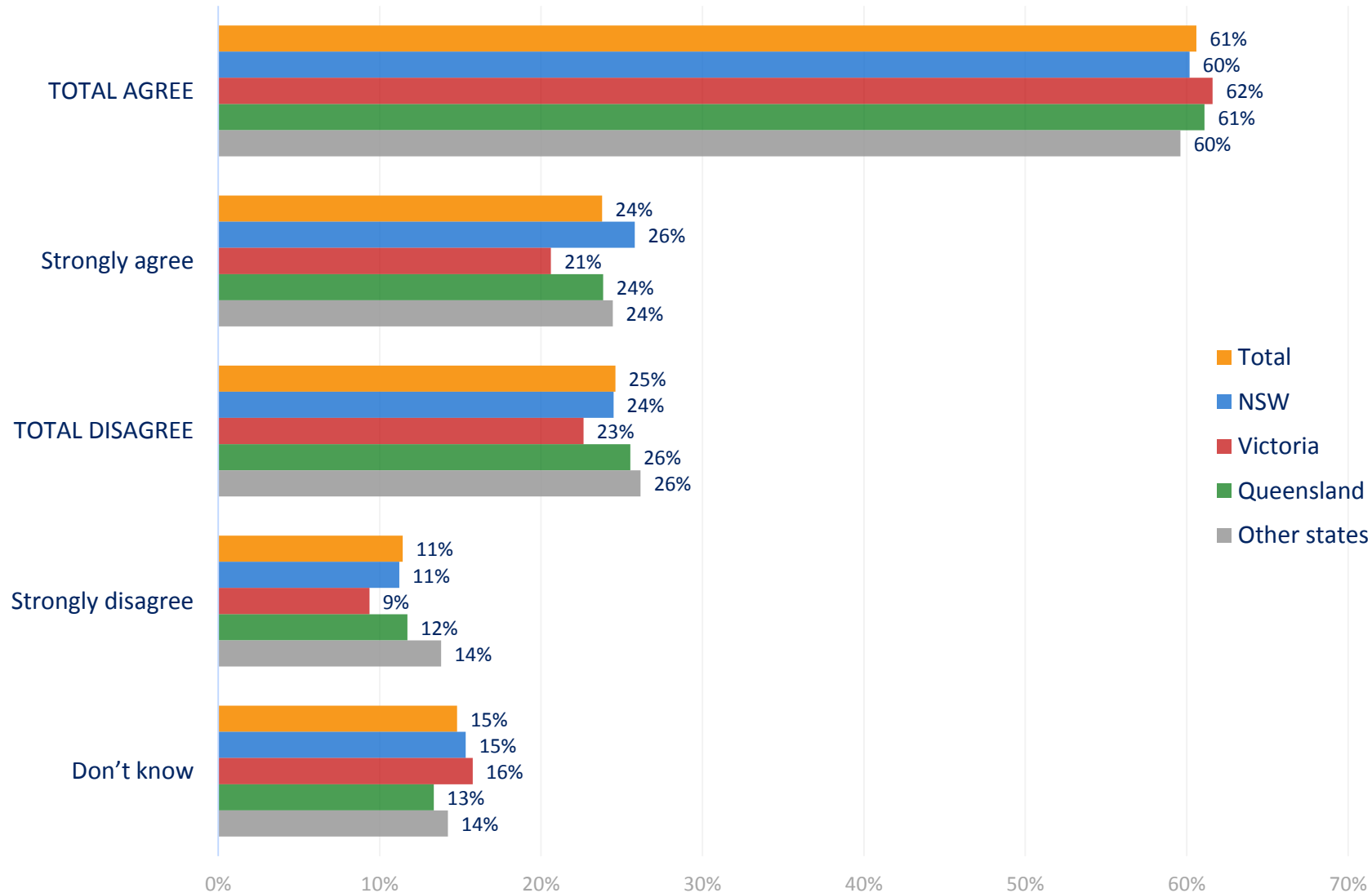
- Agreement is higher among younger voters than older voters.

Q12. To what extent do you agree or disagree that the Government should ease regulations, including lowering restrictions and taxes, on new less harmful alternatives to cigarettes in order to encourage adult smokers to fully switch to these products?

Agreement with Easing of Regulations – State



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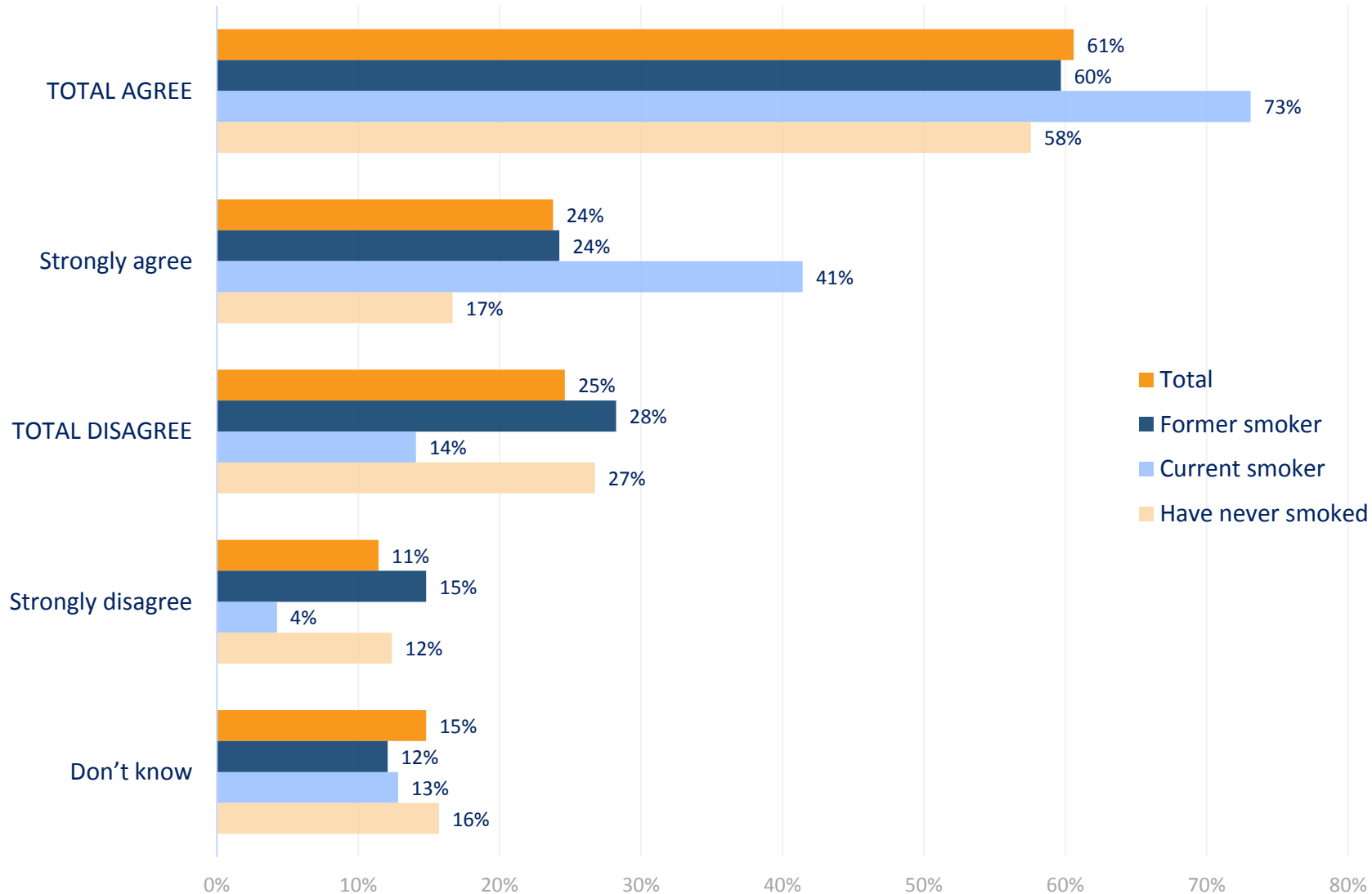
- No significant differences from the total at state level.

Q12. To what extent do you agree or disagree that the Government should ease regulations, including lowering restrictions and taxes, on new less harmful alternatives to cigarettes in order to encourage adult smokers to fully switch to these products?

Agreement with Easing of Regulations – Smoking segments



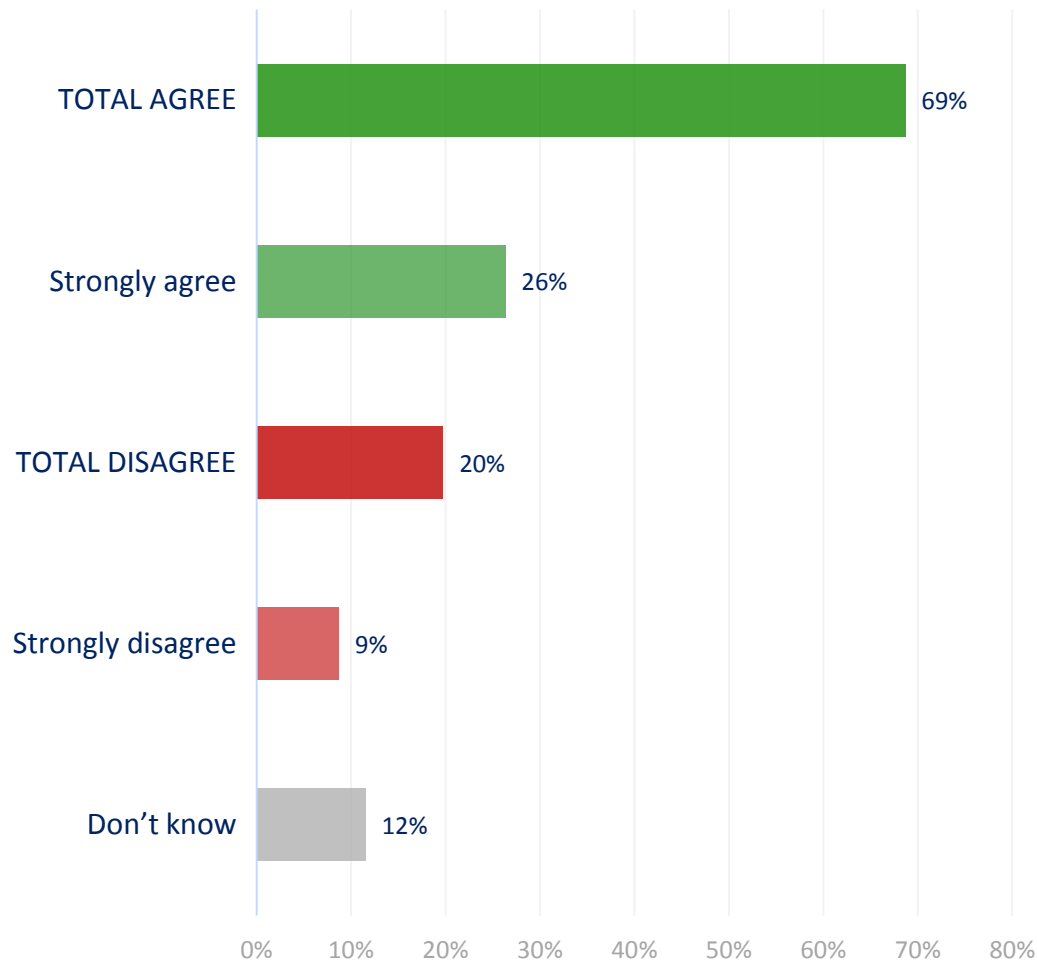
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- Current smokers are significantly more likely to agree that regulations should be eased to encourage switching to new, less harmful, alternatives.

Q12. To what extent do you agree or disagree that the Government should ease regulations, including lowering restrictions and taxes, on new less harmful alternatives to cigarettes in order to encourage adult smokers to fully switch to these products?

Support for Availability of Smoking Alternatives



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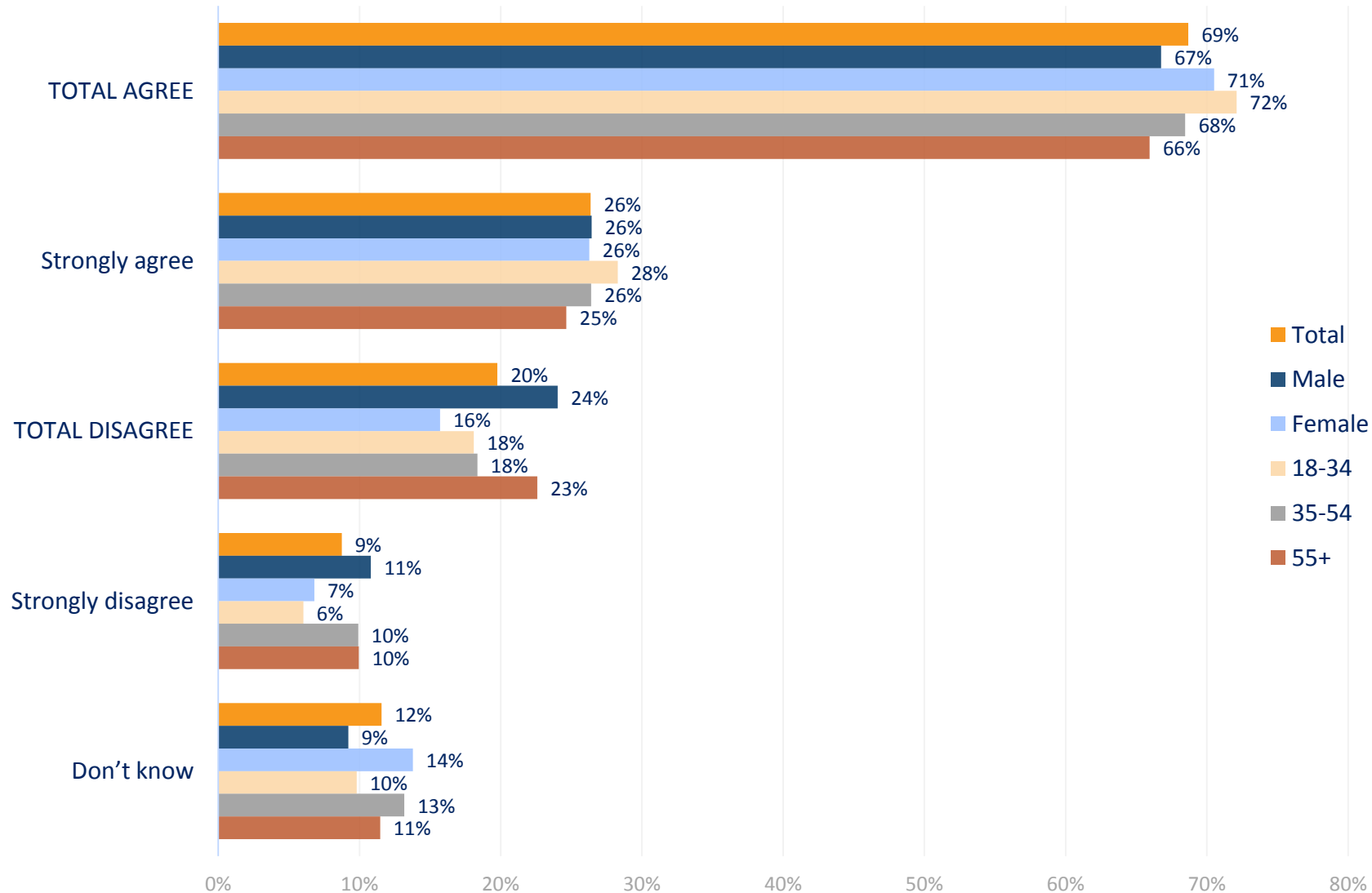
- Over two thirds of voters agree that the Australian Government should regulate, and make available, less harmful alternatives to cigarettes *'as a way to completely phase out cigarette smoking in this country'*.

Q13. To what extent do you agree or disagree that the Australian Government should regulate, and make available, less harmful alternatives to cigarettes as a way to completely phase out cigarette smoking in this country?

Support for Availability of Smoking Alternatives – Demographics



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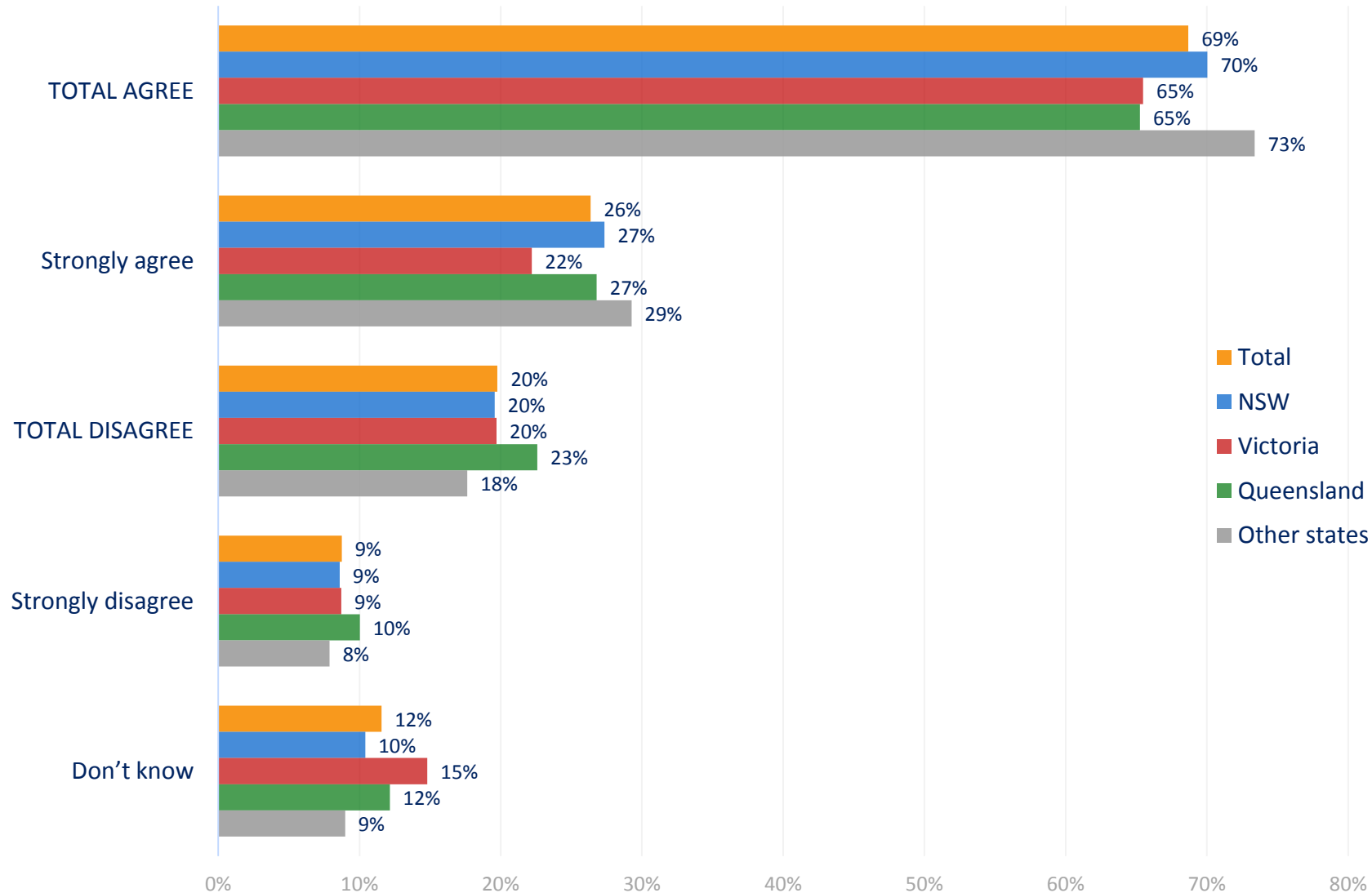
- No significant differences from the total across these demographics.

Q13. To what extent do you agree or disagree that the Australian Government should regulate, and make available, less harmful alternatives to cigarettes as a way to completely phase out cigarette smoking in this country?

Support for Availability of Smoking Alternatives – State



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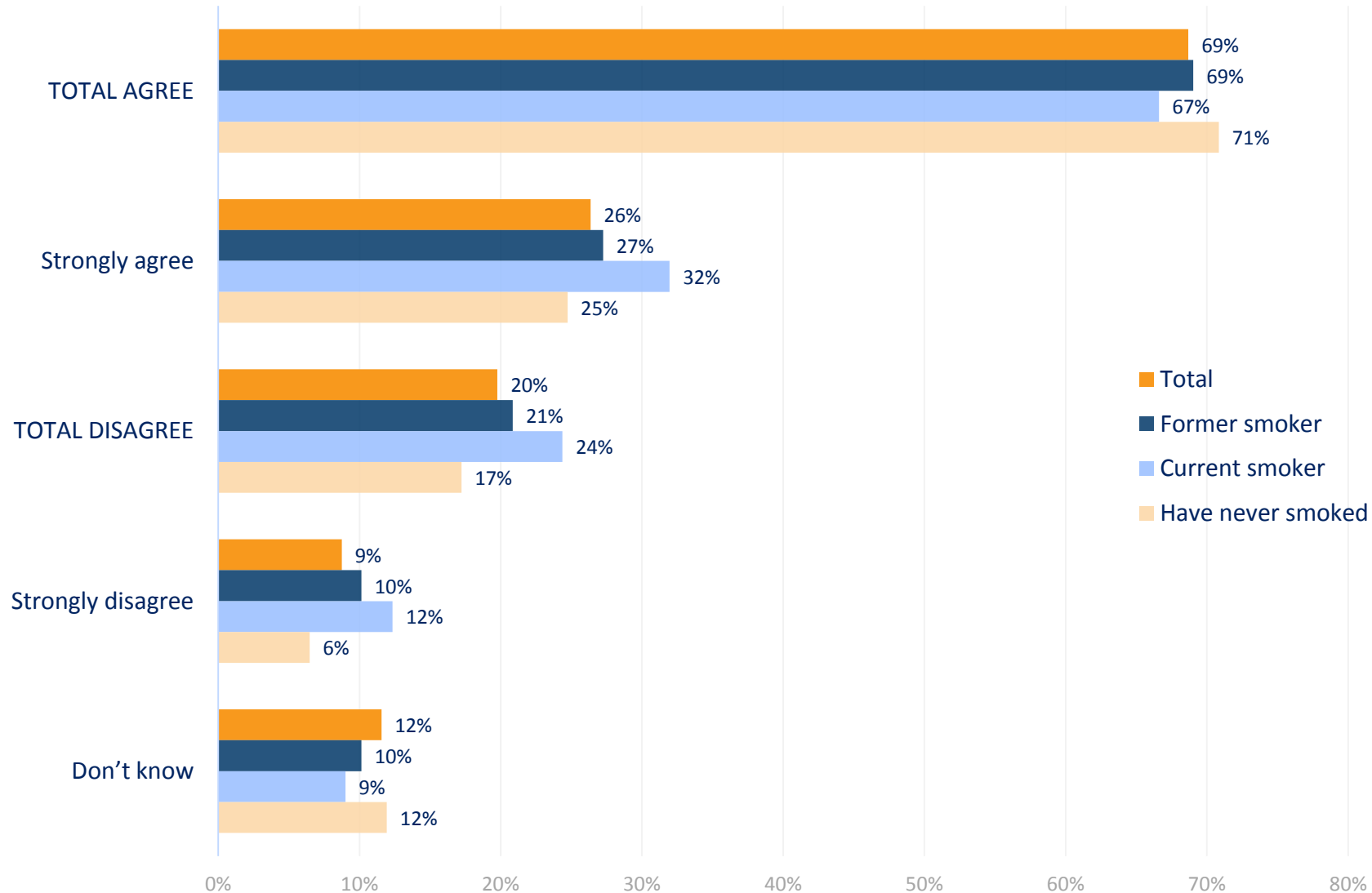
- No significant differences from the total at state level.

Q13. To what extent do you agree or disagree that the Australian Government should regulate, and make available, less harmful alternatives to cigarettes as a way to completely phase out cigarette smoking in this country?

Support for Availability of Alternatives – Smoking segments



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- No significant differences from the total across the smoking segments on this question.

Q13. To what extent do you agree or disagree that the Australian Government should regulate, and make available, less harmful alternatives to cigarettes as a way to completely phase out cigarette smoking in this country?



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Thank You