



BESPOKE INTEL | JUUL CUSTOM SURVEY | AUGUST 2018

CIGARETTE AND E-CIGARETTE SMOKING SURVEY

Audience: 7,400+ Respondents, Screening For 1,000+ Who Purchased Juul In The Past Year

KEY INSIGHTS:

ADDRESSABLE MARKET AND LAPSED CUSTOMERS (PRE-SCREENING QUESTION)

The majority of regular cigarette smokers have health-related concerns about smoking and are either currently trying to stop (13.08%) or would like to stop at some point (45.66%). Among those who are trying to quit now or eventually, a plurality think e-cigarettes would be the best way (28.51%). Among those who think E-cigarettes would be the best way to quit, the highest percentage think Blu would be the best (27%), followed by Vuse (18%) and Juul (17%). 19% of those who haven't bought Juul in the past year have used it in the past (8.96% used it once but never again, 7.4% used it occasionally, and 2.66% used it regularly).

REGULAR CIGARETTE SMOKING AMONG JUUL USERS

In all, 82% of Juul users were smoking regular cigarettes regularly before Juul. Only 8.3% of all users were not smoking any kind of regular cigarettes or e-cigarettes before Juul, but this metric is much higher when we focus on teens (33%). 45% of Juul users who have been regular smokers in the past 30 days say that they have changed their preferred cigarette brand in recent years, most often because of taste or price.

QUITTING REGULAR CIGARETTES

Juul users who also smoke regular cigarettes are considerably more likely than regular smokers from the pre-screener to say E-Cigarettes would be the best way to quit smoking. There aren't large differences in the amount of money Juul users who regularly smoked cigarettes before Juul spend on cigarettes pre and post Juul (if anything, they spent slightly more in the past month per week than they did per week prior to Juul). The same is true of number of cigarettes that they smoke per day.

That said, Juul users who smoked cigarettes regularly prior to Juul *think* that it is causing them to smoke cigarettes less (76%).

WHO IS THE JUUL USER?

A plurality of Juul users live in suburban areas (44%) followed by urban (39%) and Rural (16%). The majority of Juul users fall in the age range of 21-39 years-old (~7% are under 20 years old). The user base over-indexed, especially among younger respondents, to being females. The Juul user also over-indexes to being single.

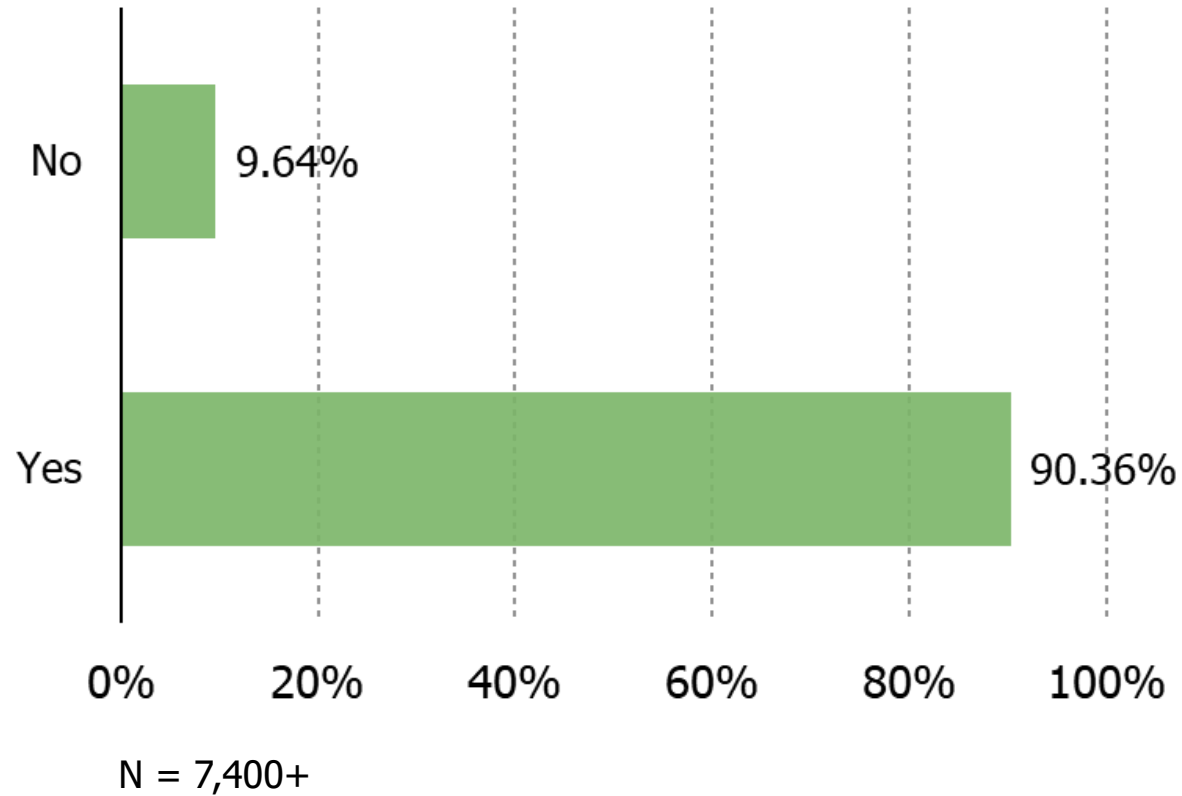
JUUL USAGE

Respondents are about even on how their Juul usage has changed over the past several months (28% more, 28% less, and the balance say unchanged). Notably, the younger the respondent the more likely they are to say they have reduced usage. The same is true for expected usage in 2019. Unsurprisingly, younger users are more likely to say they started using Juul because it is a social product to be used with friends or because they think it is cool. Older respondents were much more likely to say they started using it to try to quit regular cigarettes. Juul's net promoter score readings are strong at 20-30 depending on who they would be recommending the product to. Among teens, though, their net promoter score is negative.

PRE-SCREEN DATA (ie, includes lapsed customers who haven't bought Juul in a year and non-Juul users)

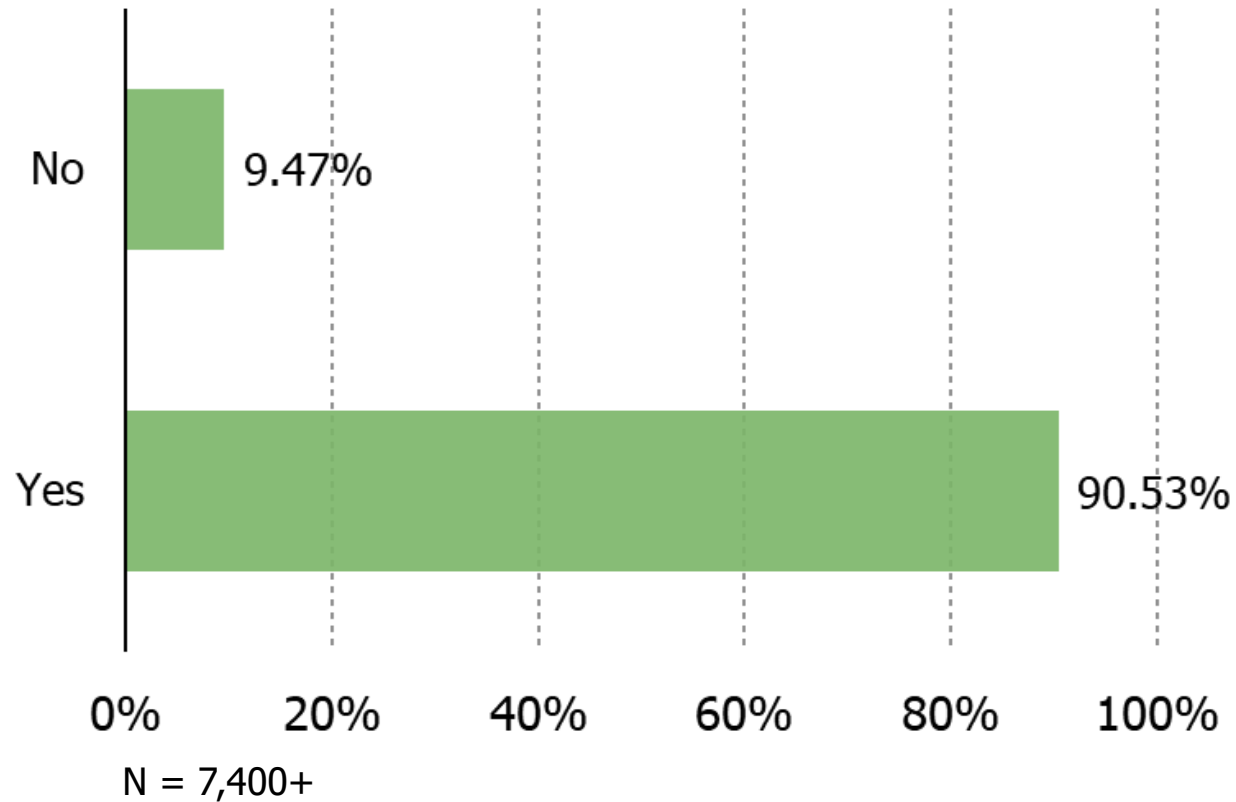
At any point in the last 5 years, have you ever been a regular cigarette smoker (at least a few regular cigarettes per day, excluding e-cigarettes)?

Posed to pre-screen respondents (before we screened in respondents who bought Juul in the past year).



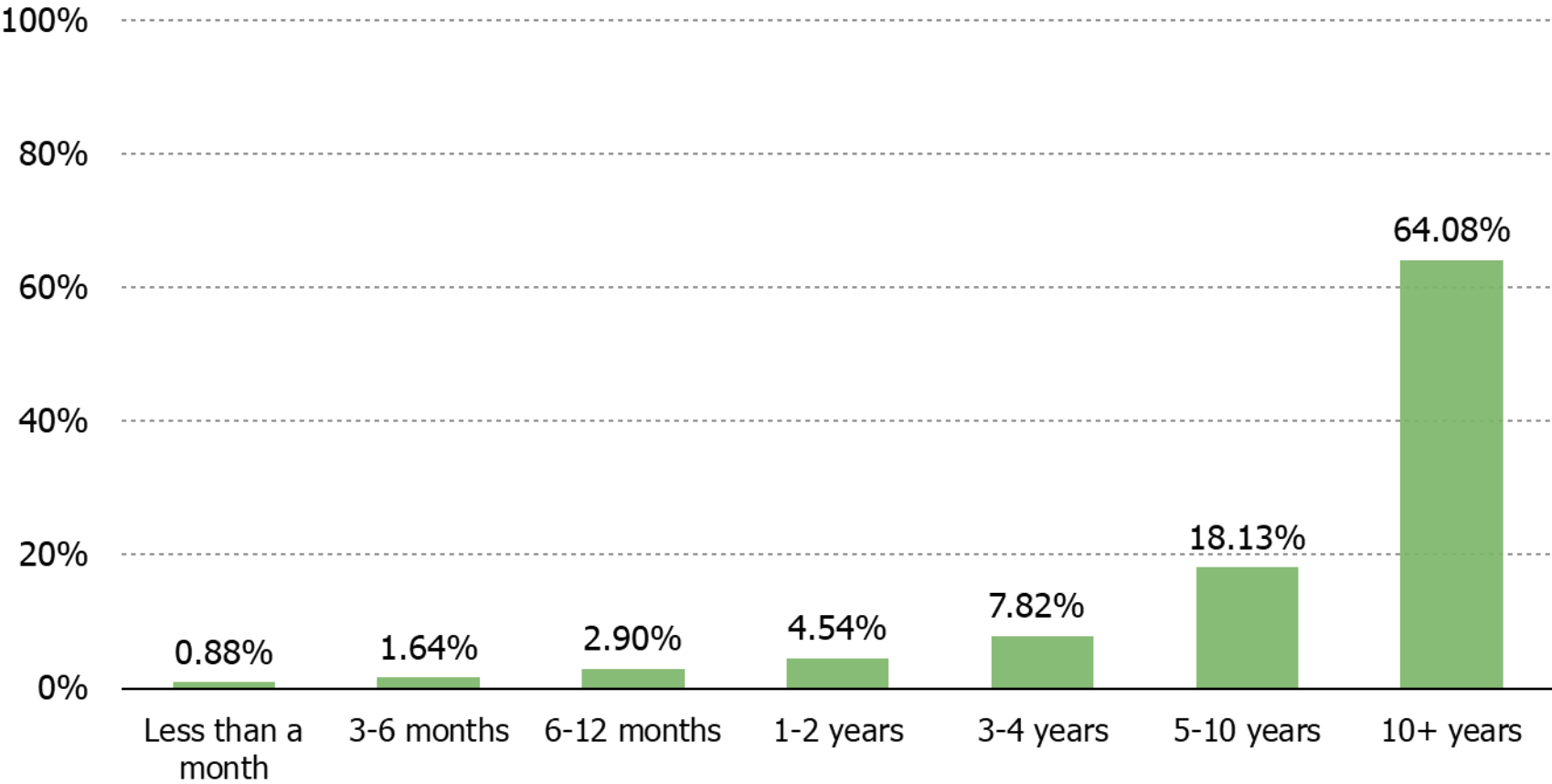
In the last 30 days, have you been a regular smoker (at least a few regular cigarettes per day, excluding e-cigarettes)?

Posed to pre-screen respondents (before we screened in respondents who bought Juul in the past year).



For how long have you been smoking regular cigarettes?

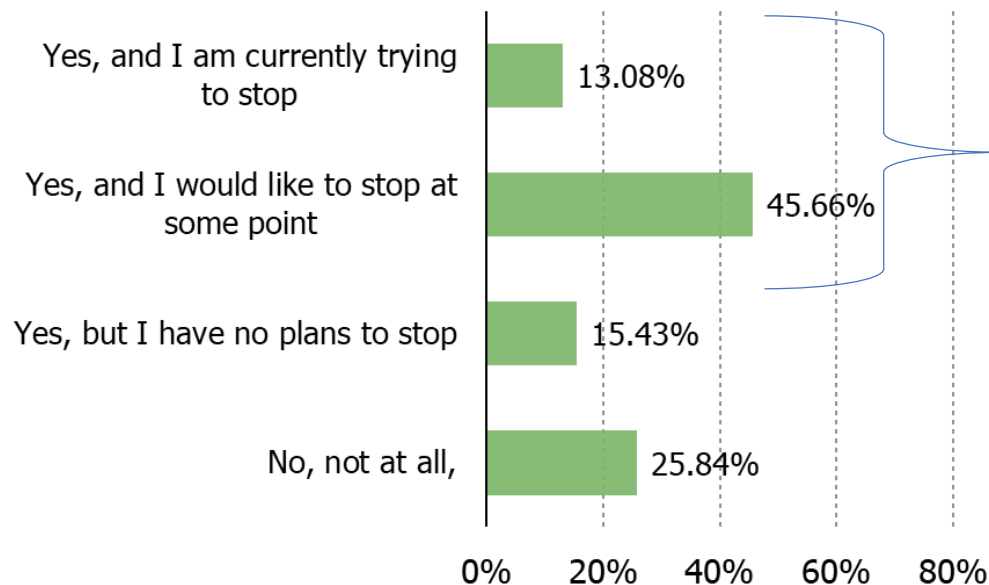
Posed to pre-screen respondents (before we asked if they have bought Juul in the past year) who have smoked regular cigarettes in the past 30 days.



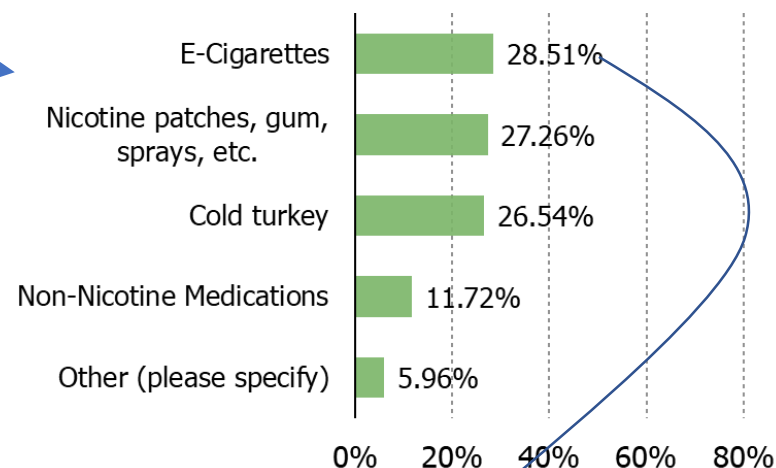
N = 6,690

Do you have any health-related concerns about smoking regular cigarettes?

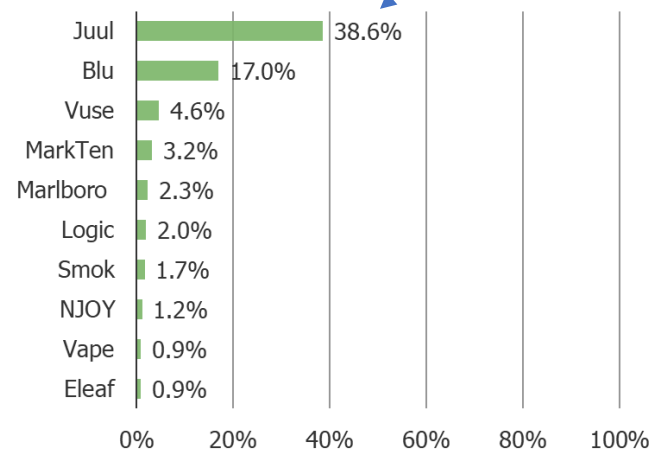
Posed to pre-screen respondents (before we asked if they have bought Juul in the past year) who have smoked regular cigarettes in the past 30 days.



What do you think would be the best way to stop?

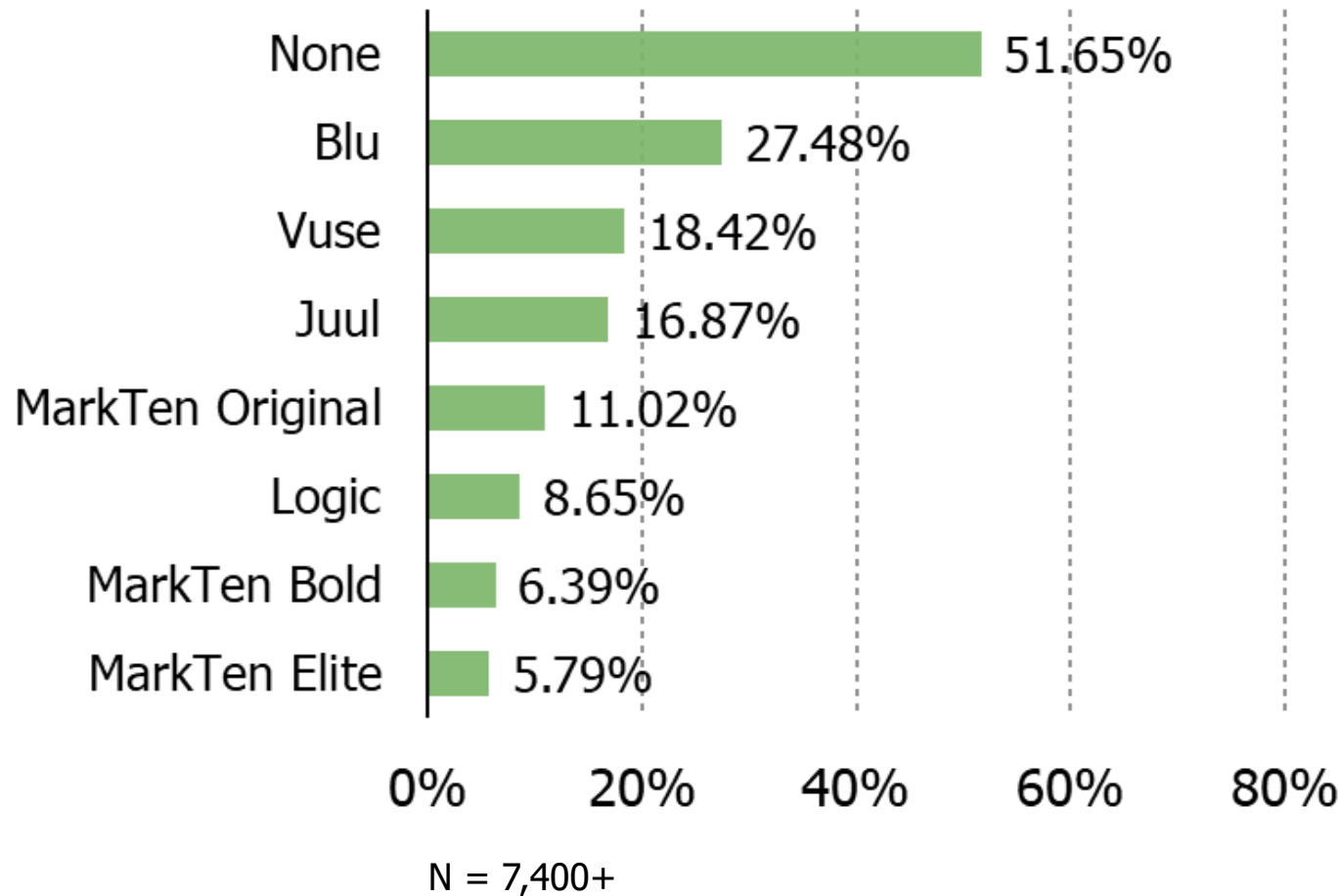


What brand of e-cigarette do you think would be best for you?



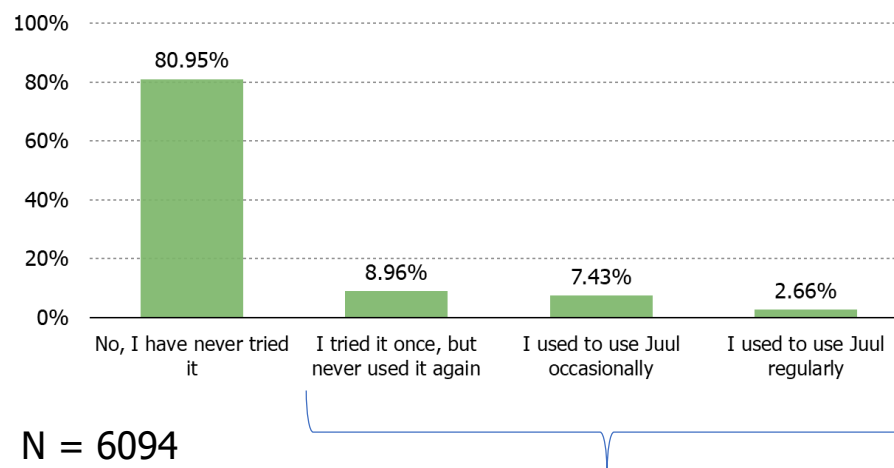
In the last year, have you purchased any of these e-cigarette brands?

Posed to pre-screen respondents (before we screened in respondents who bought Juul in the past year).

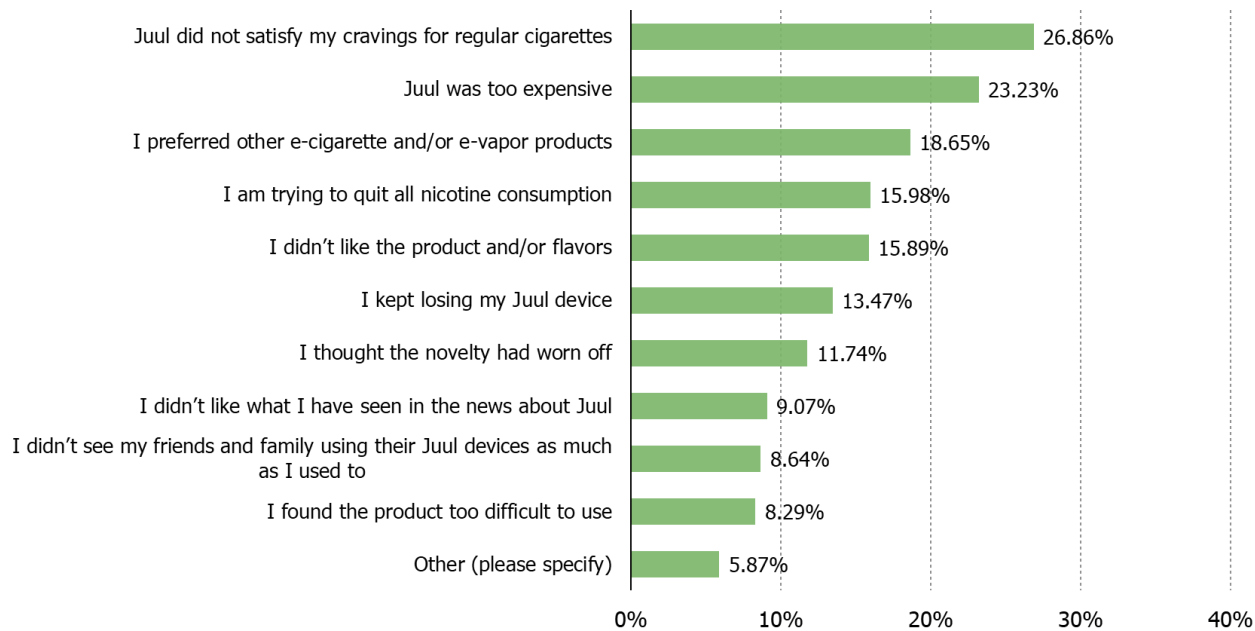


Have you ever used Juul?

Posed to pre-screen respondent who did not buy Juul in the past year.

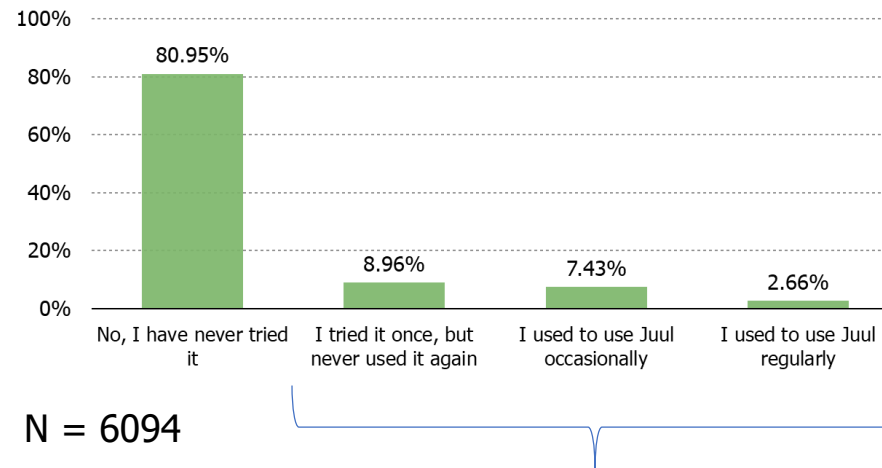


Why did you quit using Juul?

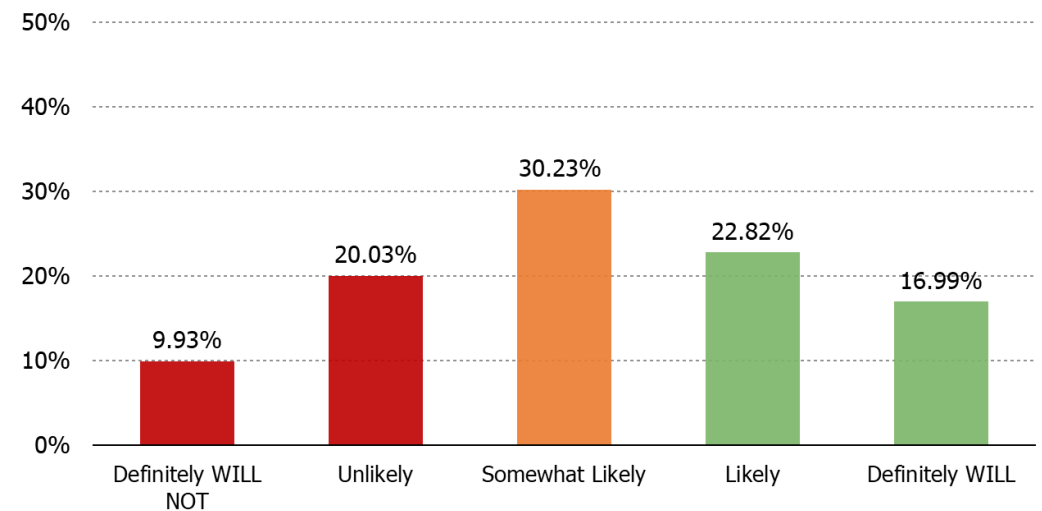


Have you ever used Juul?

Posed to pre-screen respondent who did not buy Juul in the past year.



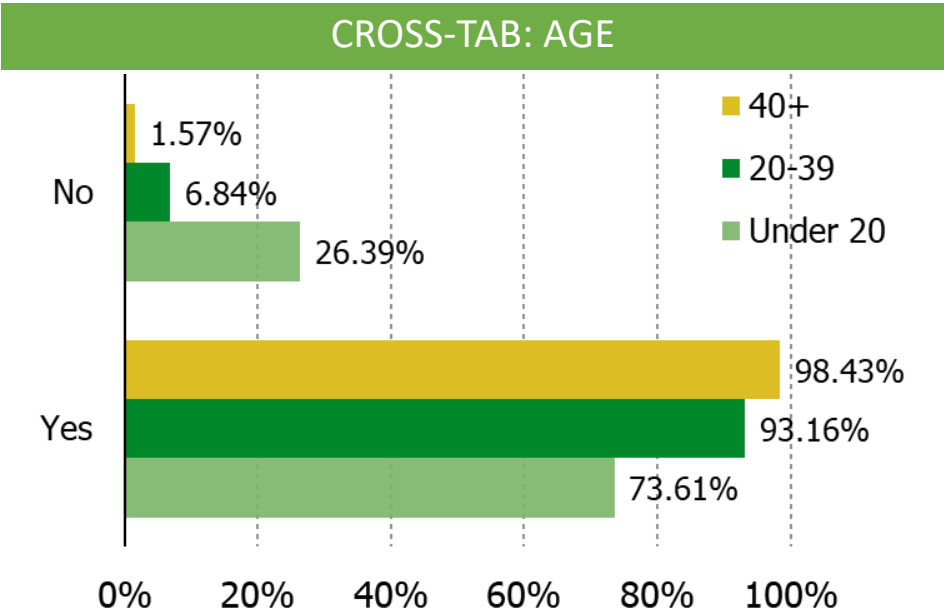
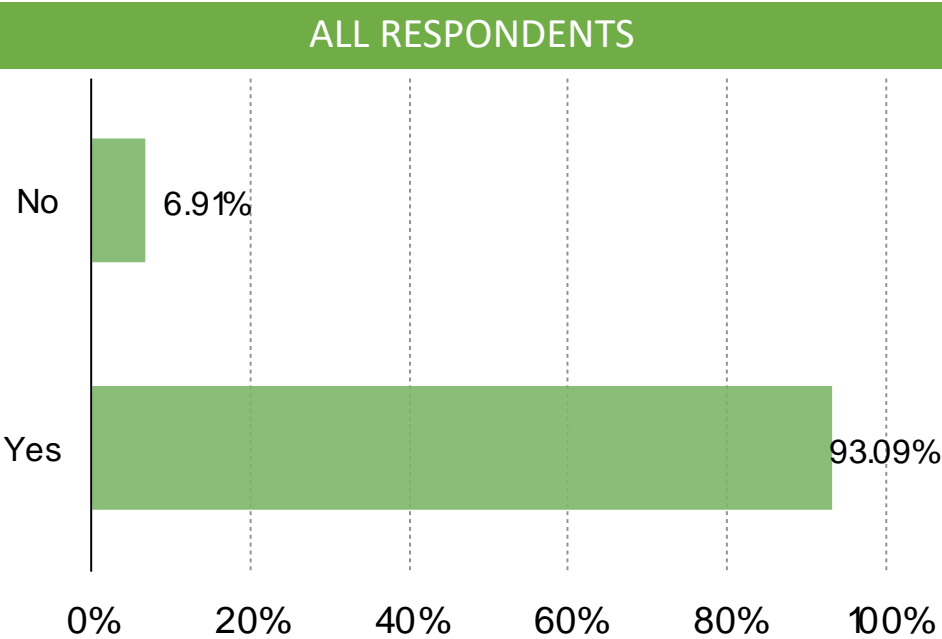
How likely are you to use Juul again in the future?



TARGET AUDIENCE (RESPONDENTS BOUGHT JUUL IN THE PAST YEAR) BACKGROUND DATA

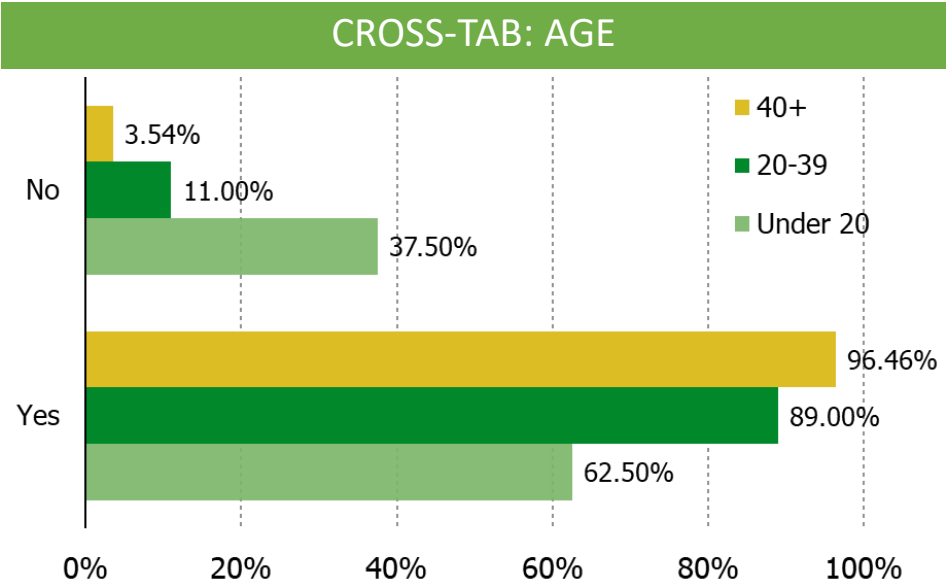
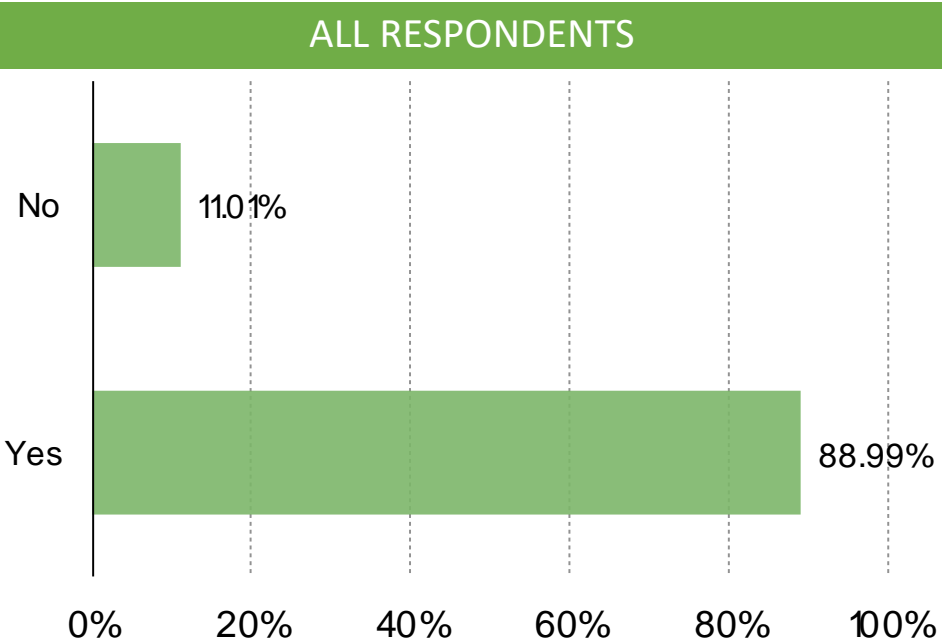
At any point in the last 5 years have you ever been a regular cigarette smoker (at least a few regular cigarettes per day, excluding e-cigarettes)?

Posed to the target audience (1000 respondents who bought Juul in the past year)



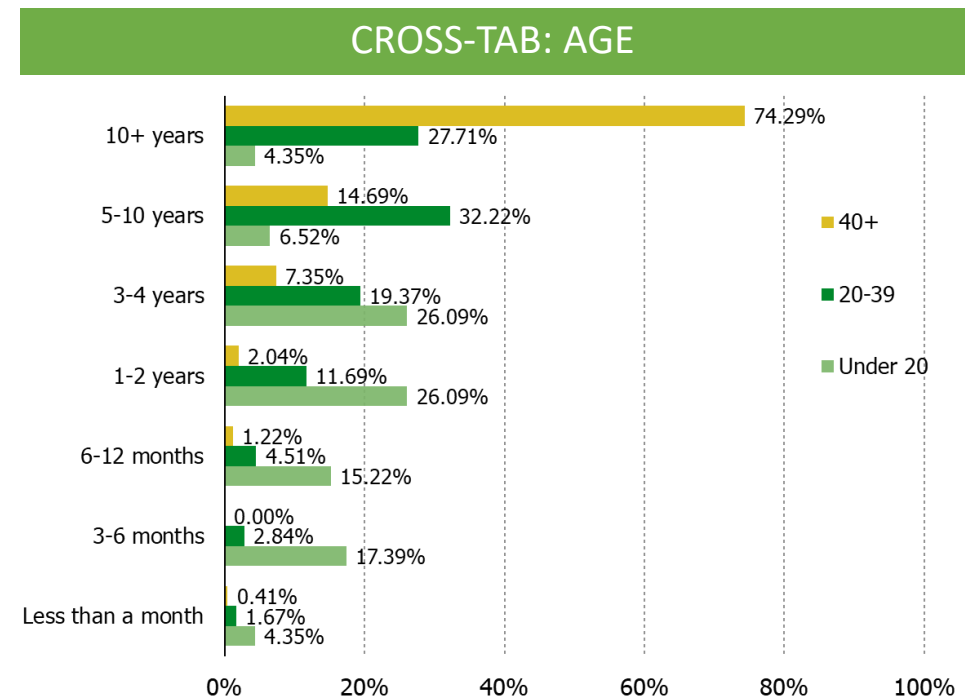
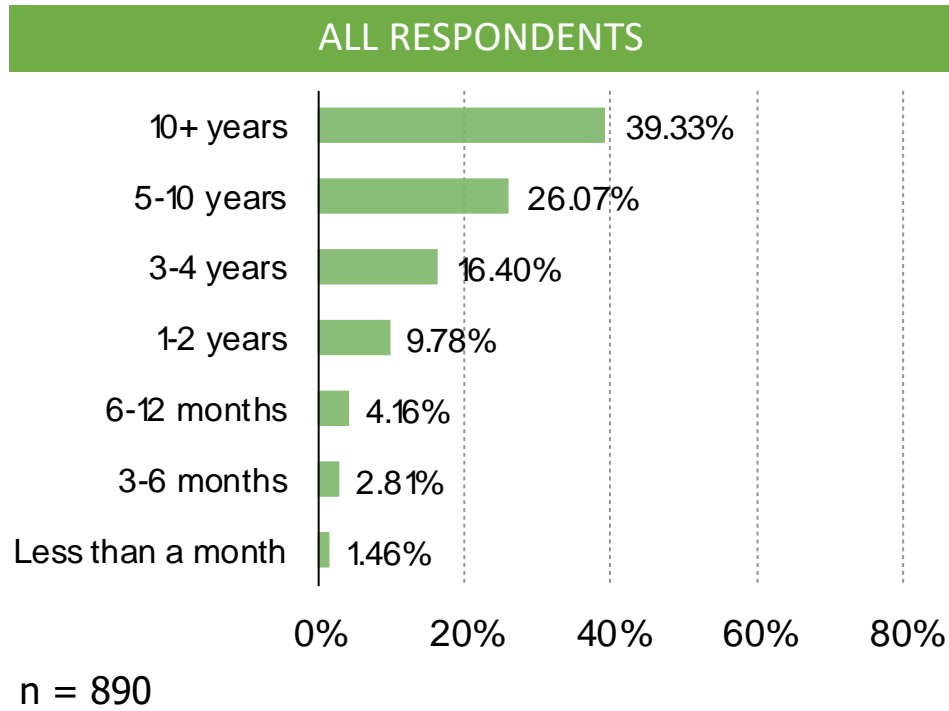
In the last 30 days, have you been a regular smoker (at least a few regular cigarettes per day, excluding e-cigarettes)?

Posed to the target audience (1000 respondents who bought Juul in the past year)



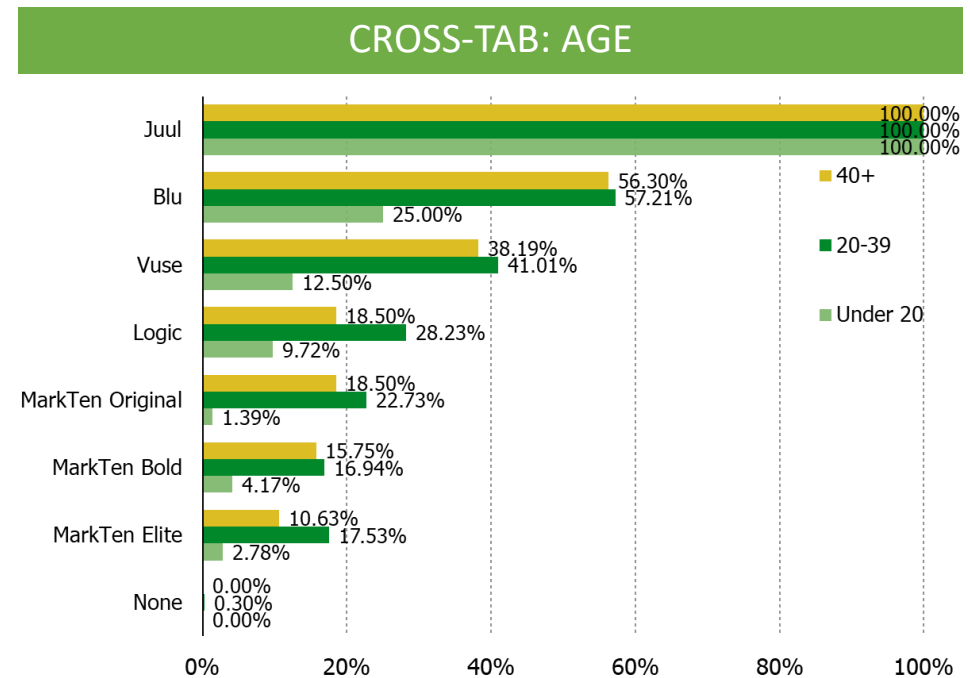
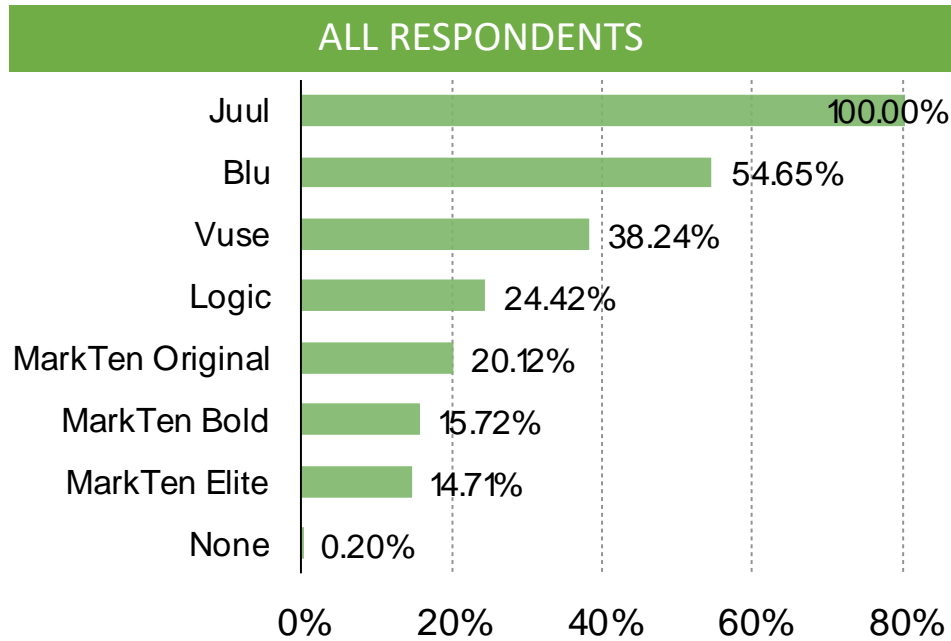
For how long have you been smoking regular cigarettes?

Posed to the target audience (1000 respondents who bought Juul in the past year) who are also regular smokers.



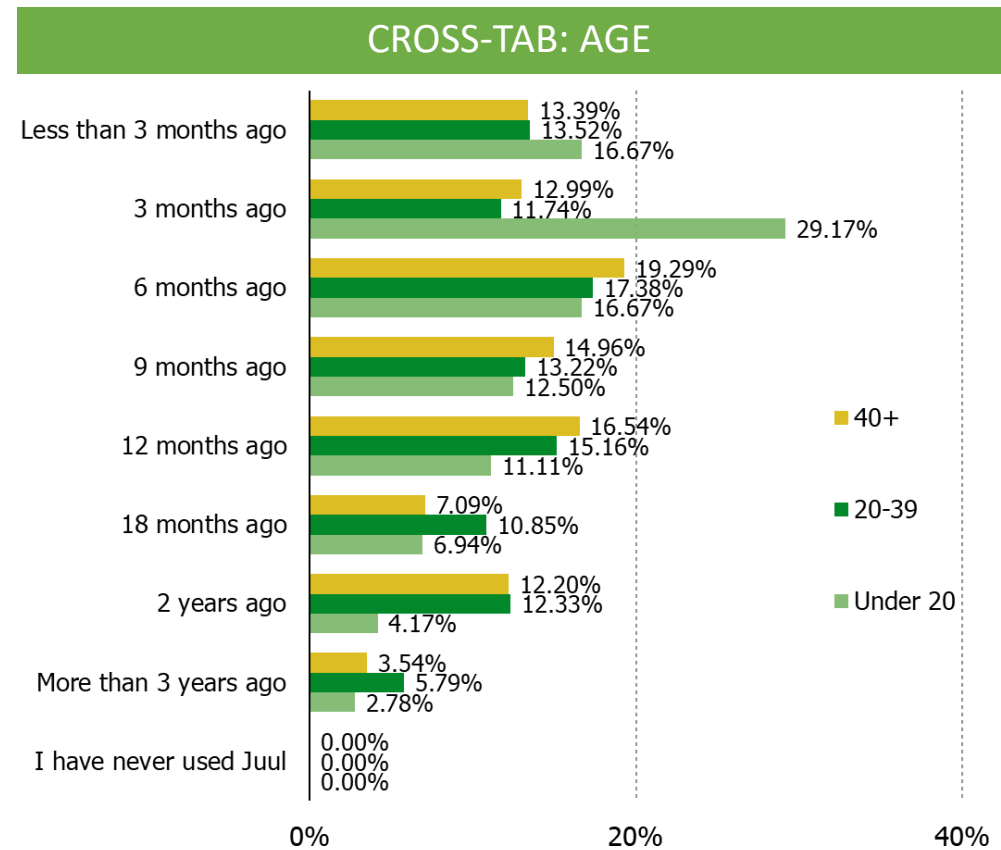
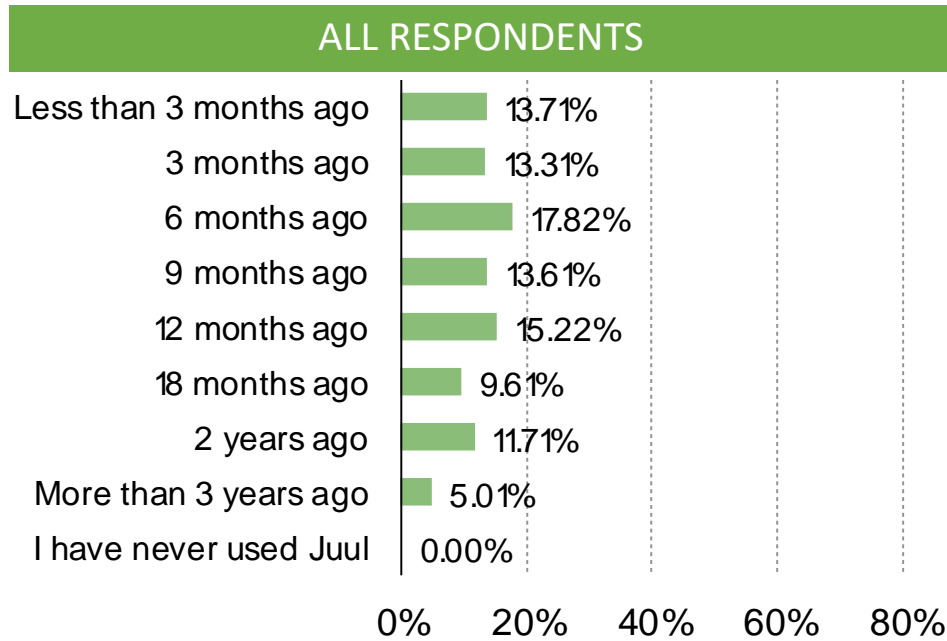
In the last year have you purchased any of these e-cigarette brands? (Select ALL that apply)

Posed to the target audience (1000 respondents who bought Juul in the past year)



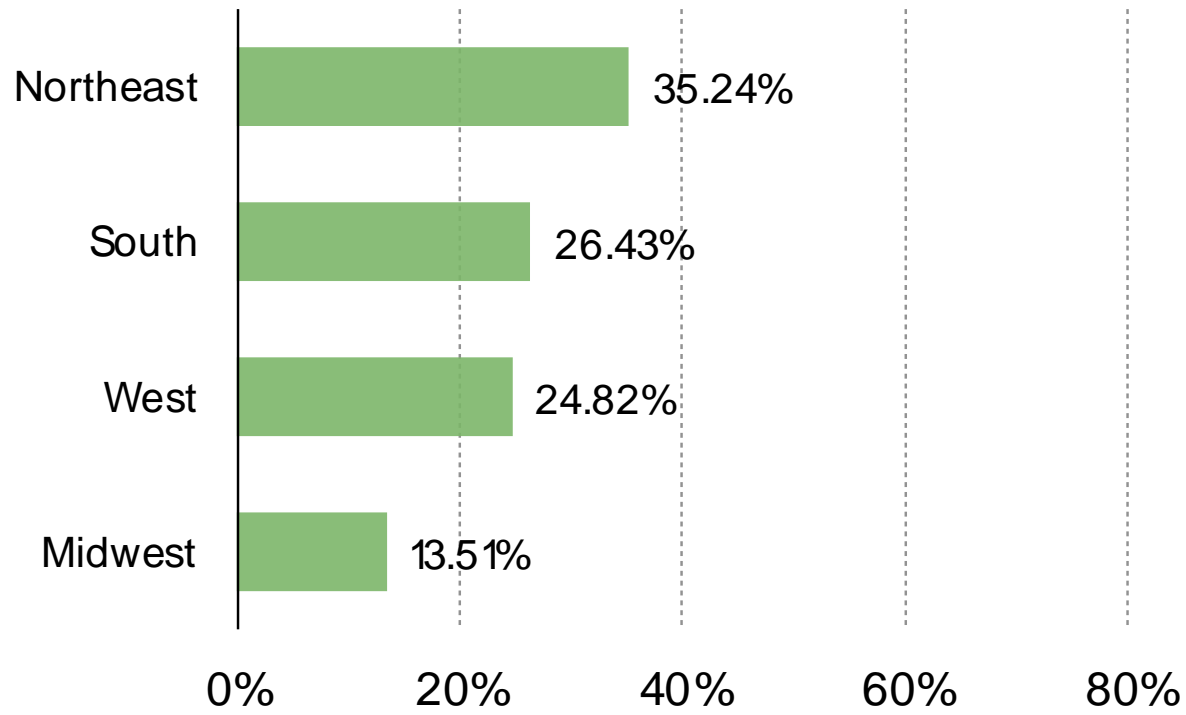
When did you first purchase Juul?

Posed to the target audience (1000 respondents who bought Juul in the past year)



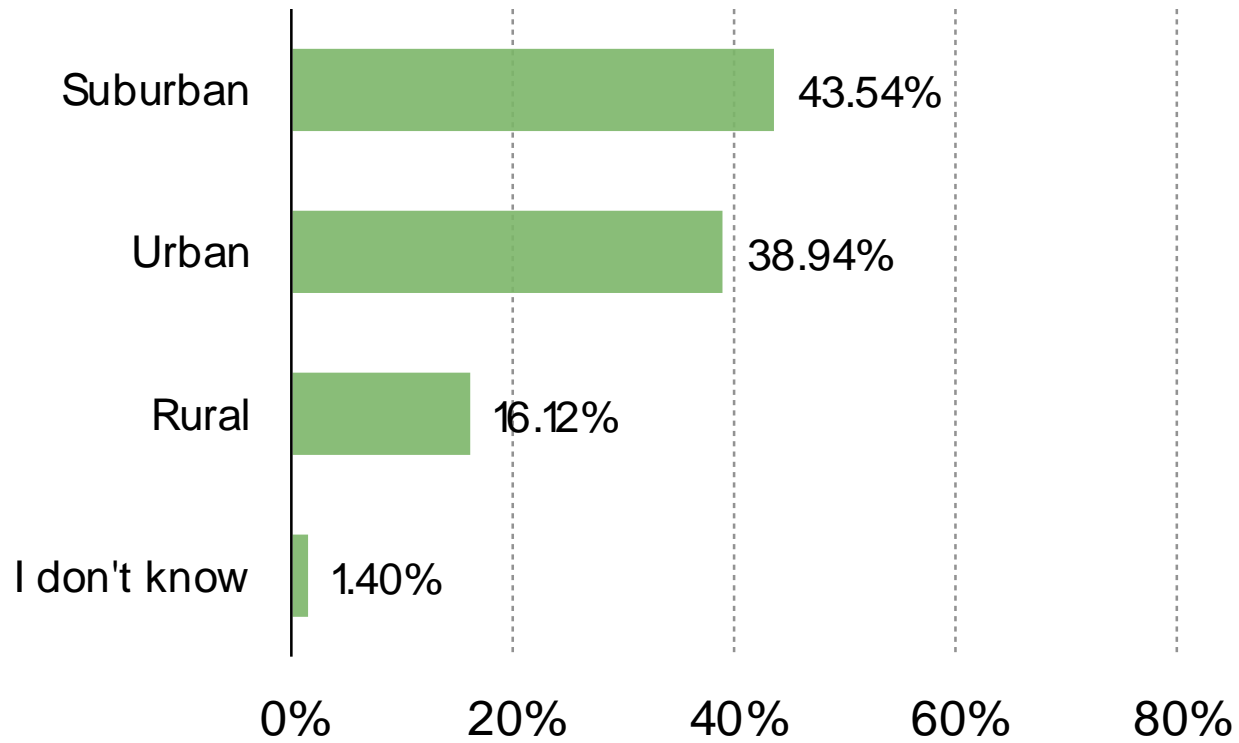
In which region of the United States do you live?

Posed to the target audience (1000 respondents who bought Juul in the past year)



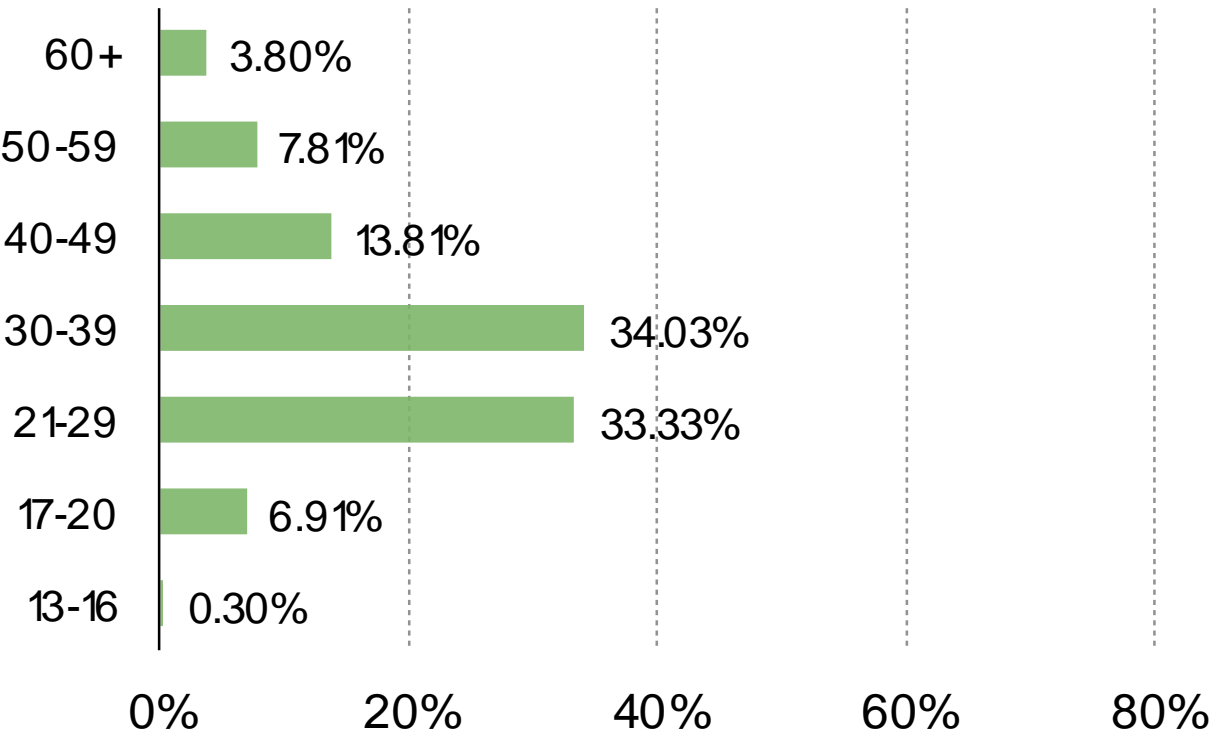
Which of the following best describes the area you live in?

Posed to the target audience (1000 respondents who bought Juul in the past year)



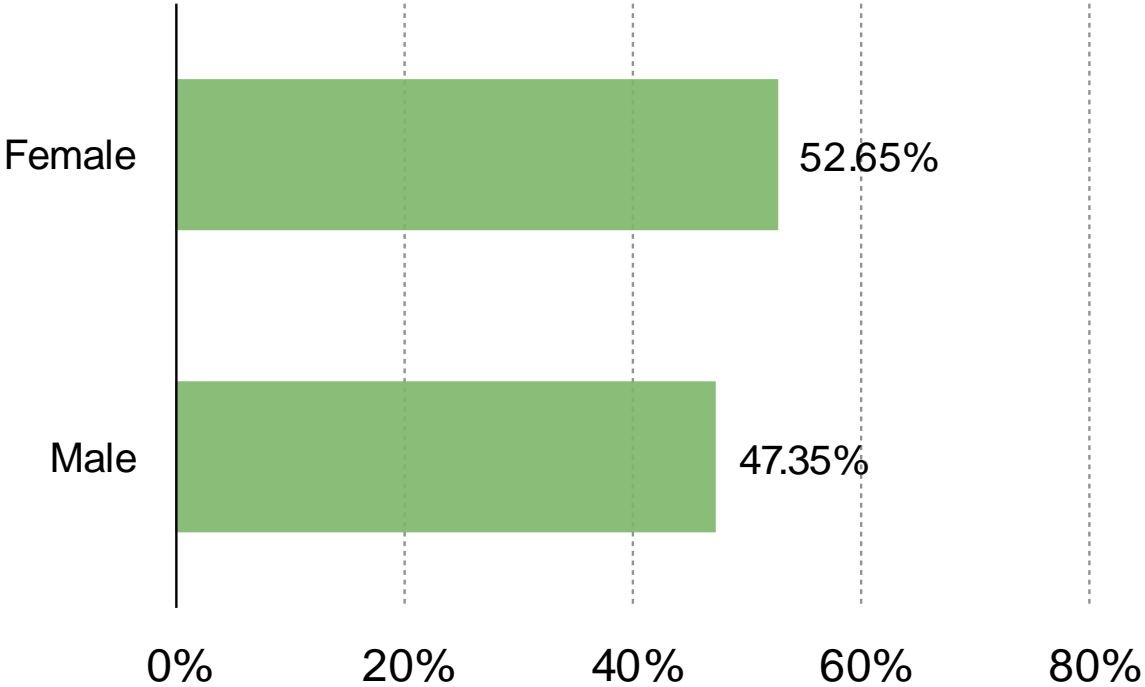
What is your age?

Posed to the target audience (1000 respondents who bought Juul in the past year)



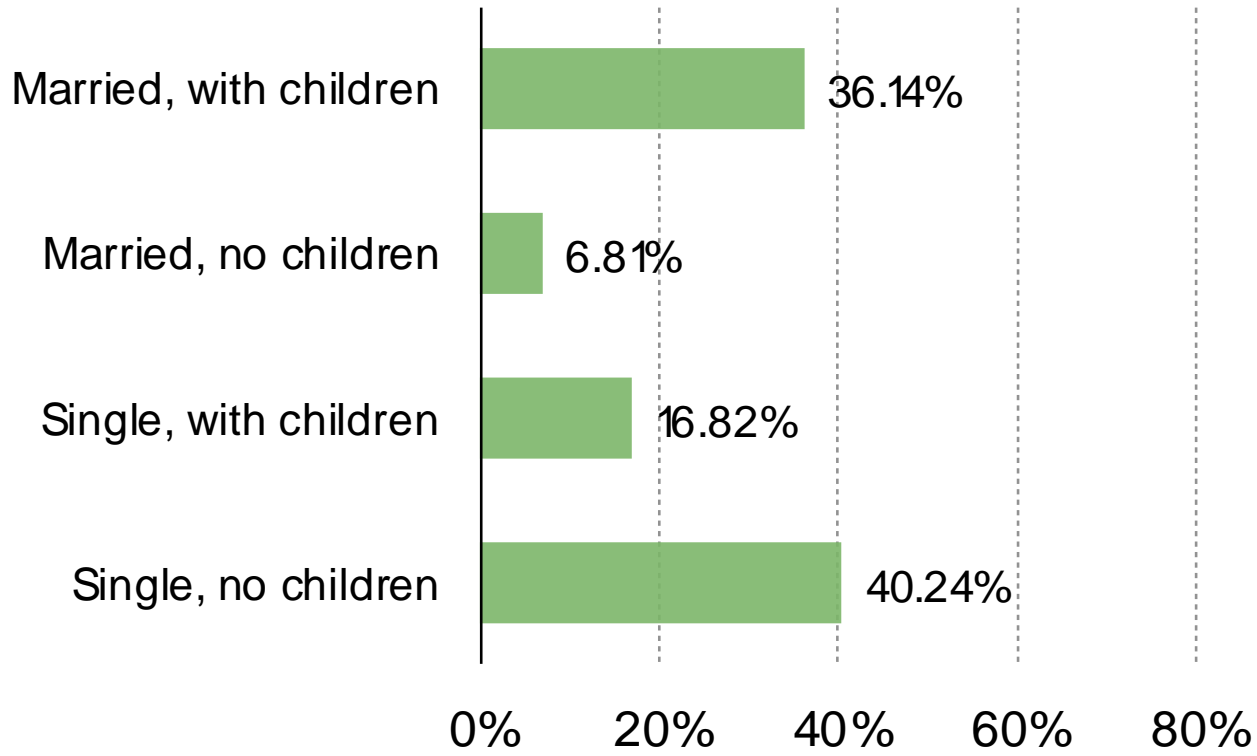
What is your gender?

Posed to the target audience (1000 respondents who bought Juul in the past year)



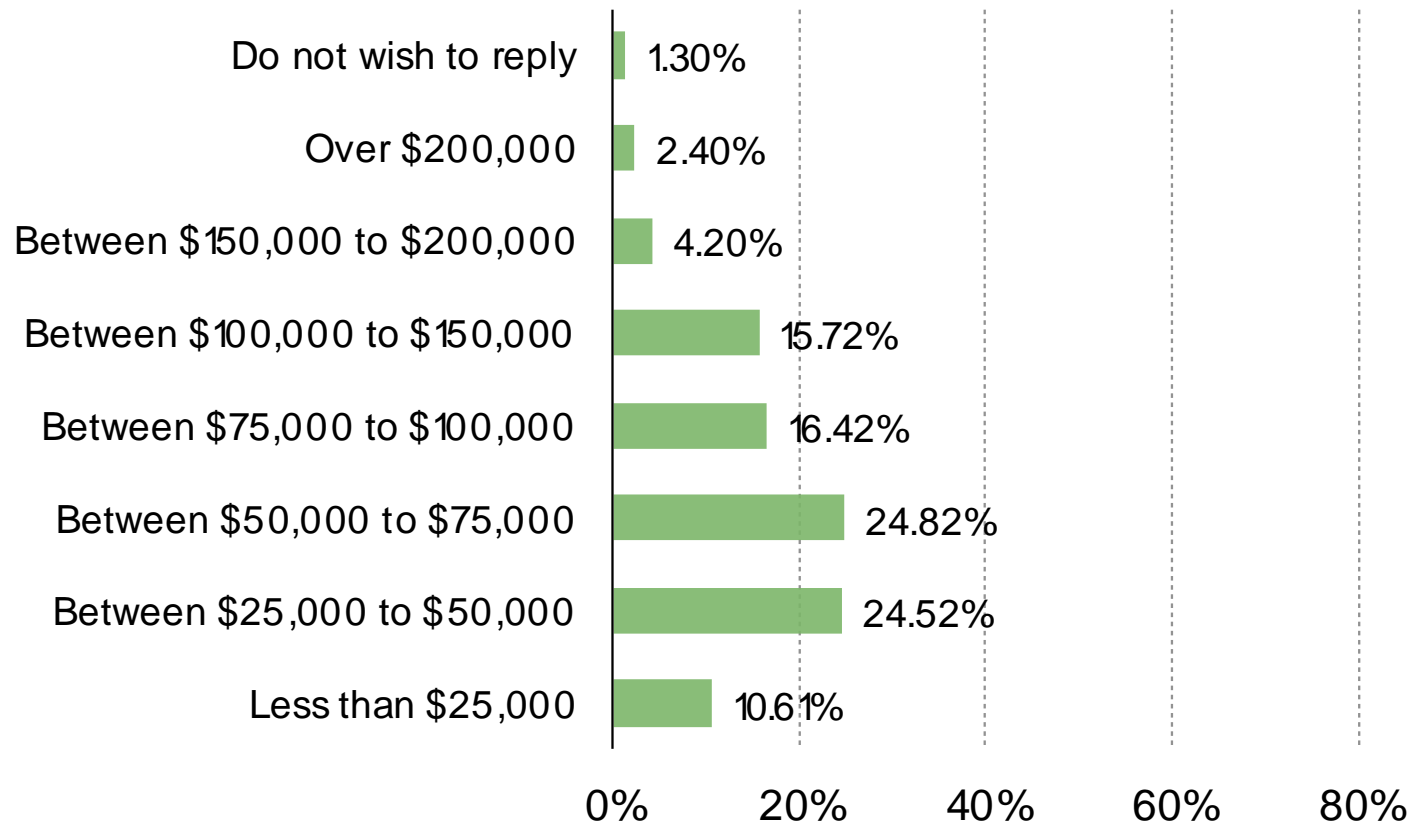
Please describe your marital status?

Posed to the target audience (1000 respondents who bought Juul in the past year)



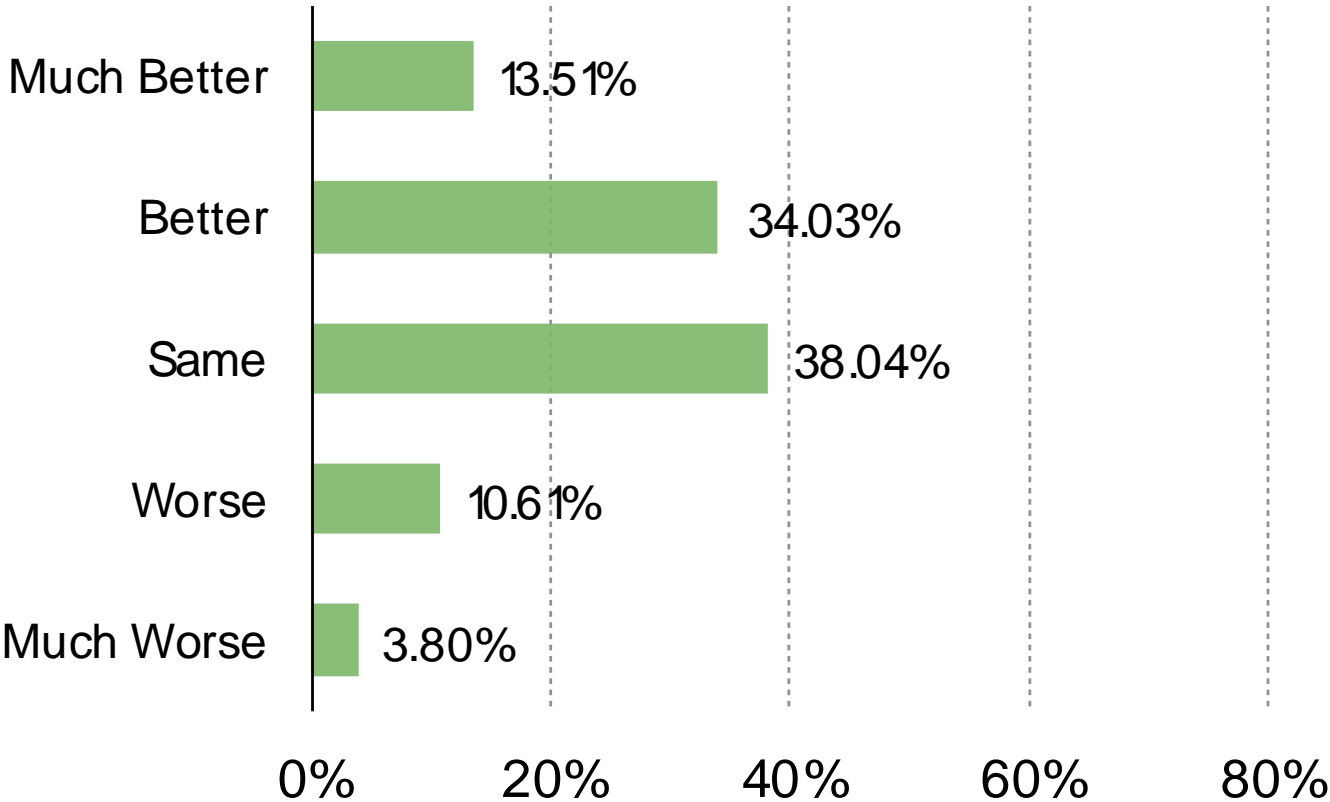
Which of the following best describes your total annual household income before taxes?

Posed to the target audience (1000 respondents who bought Juul in the past year)



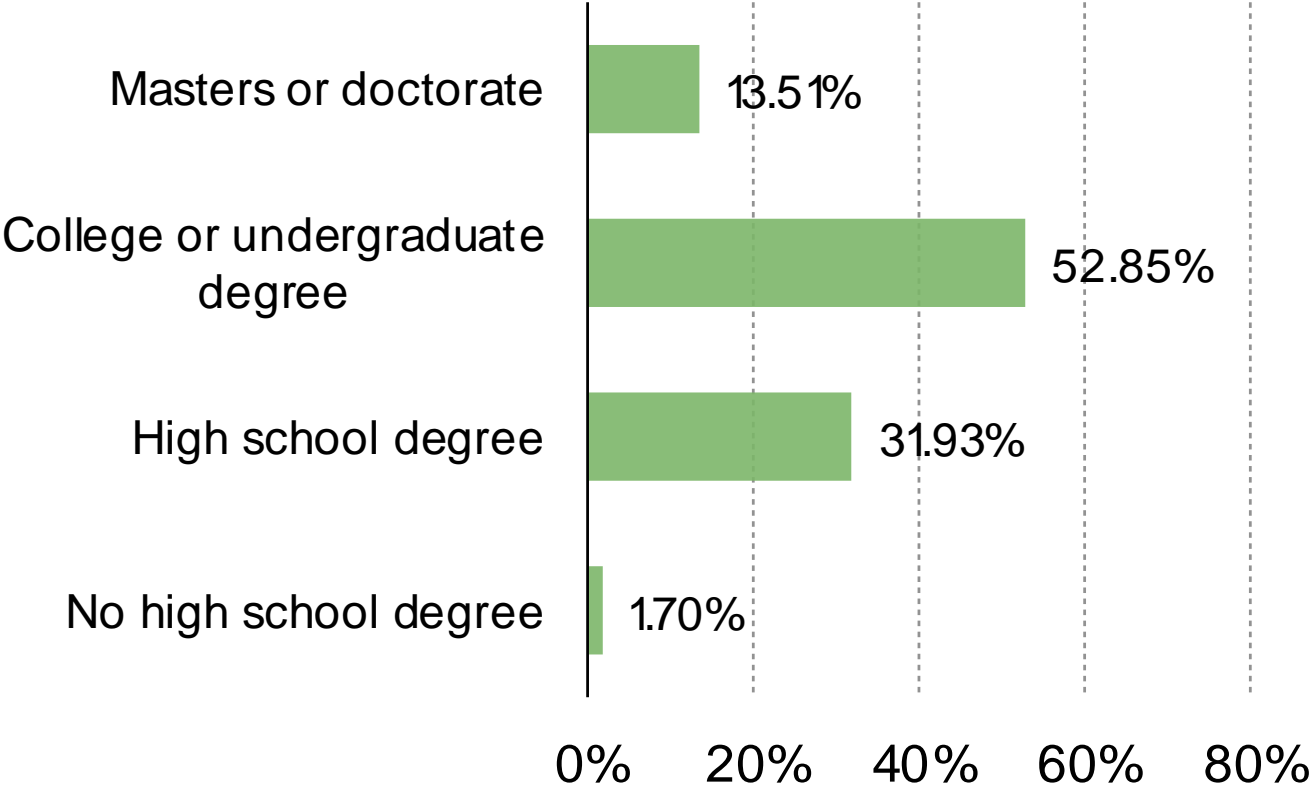
How has your financial situation changed in the last year?

Posed to the target audience (1000 respondents who bought Juul in the past year)



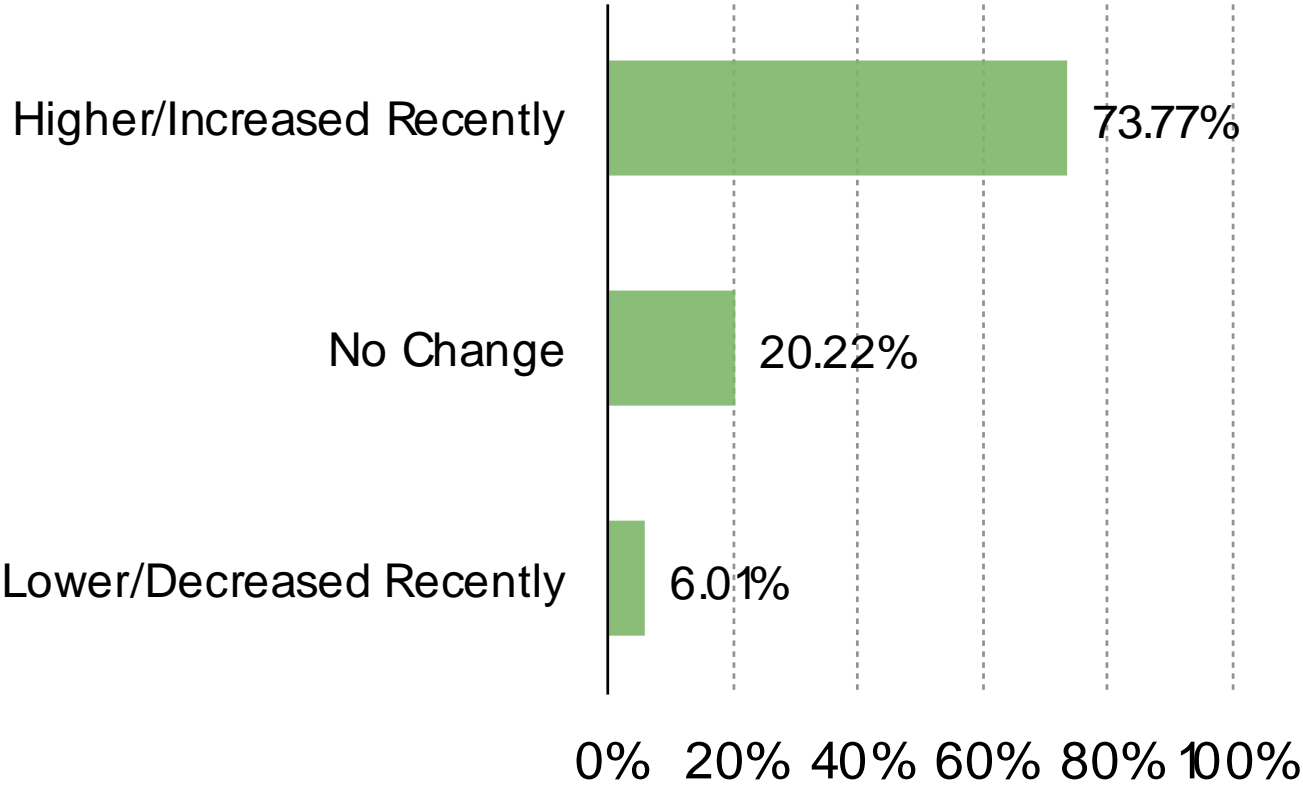
Please describe your educational credentials

Posed to the target audience (1000 respondents who bought Juul in the past year)



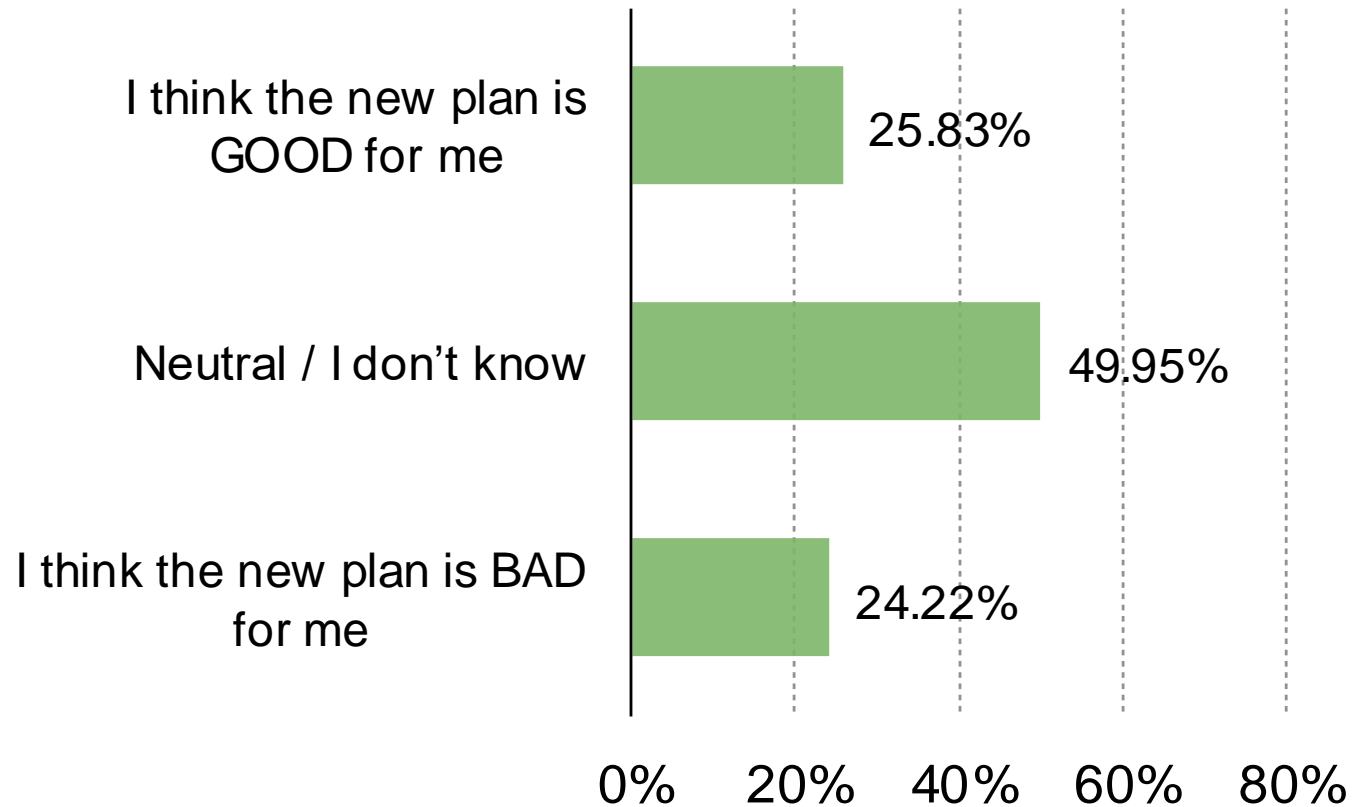
Have you noticed any changes in gas prices recently?

Posed to the target audience (1000 respondents who bought Juul in the past year)



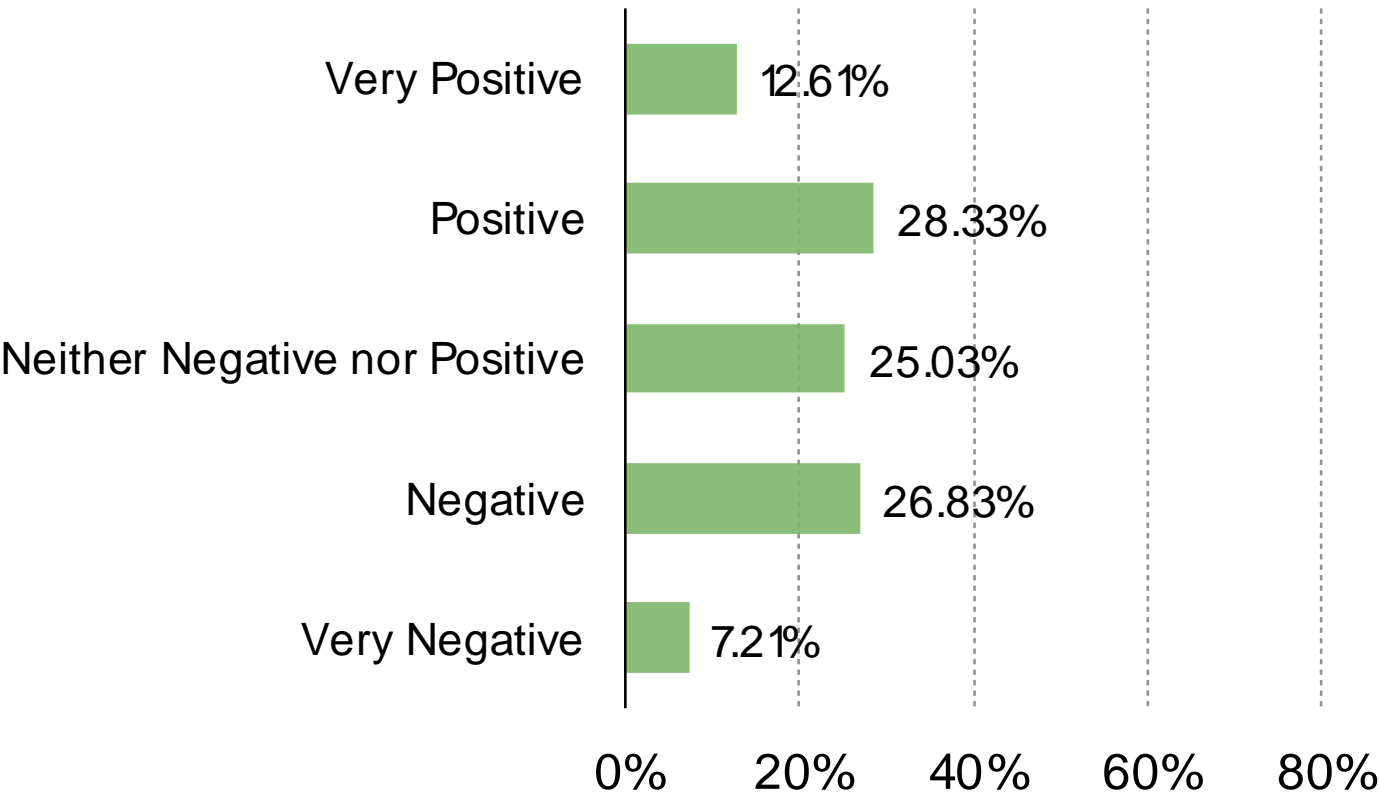
How do you think the new tax plan will impact you specifically?

Posed to the target audience (1000 respondents who bought Juul in the past year)



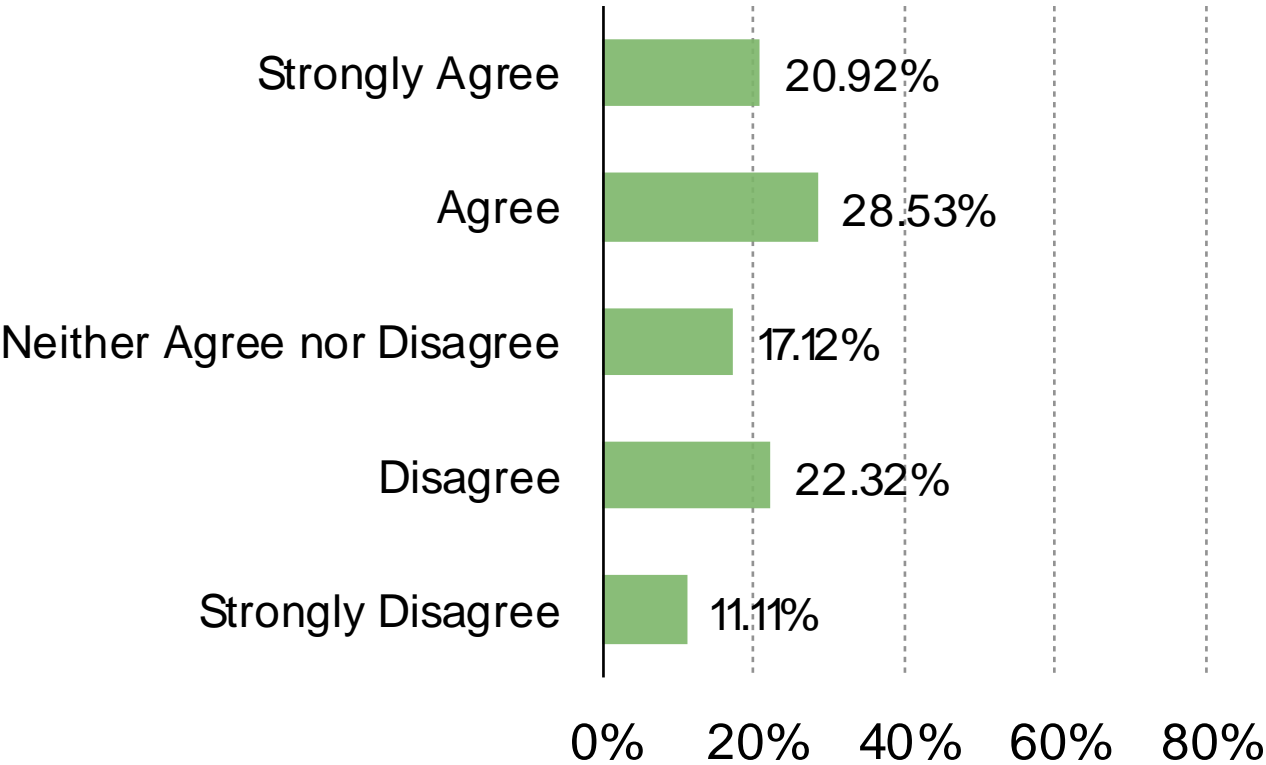
What is your current opinion of the economy?

Posed to the target audience (1000 respondents who bought Juul in the past year)



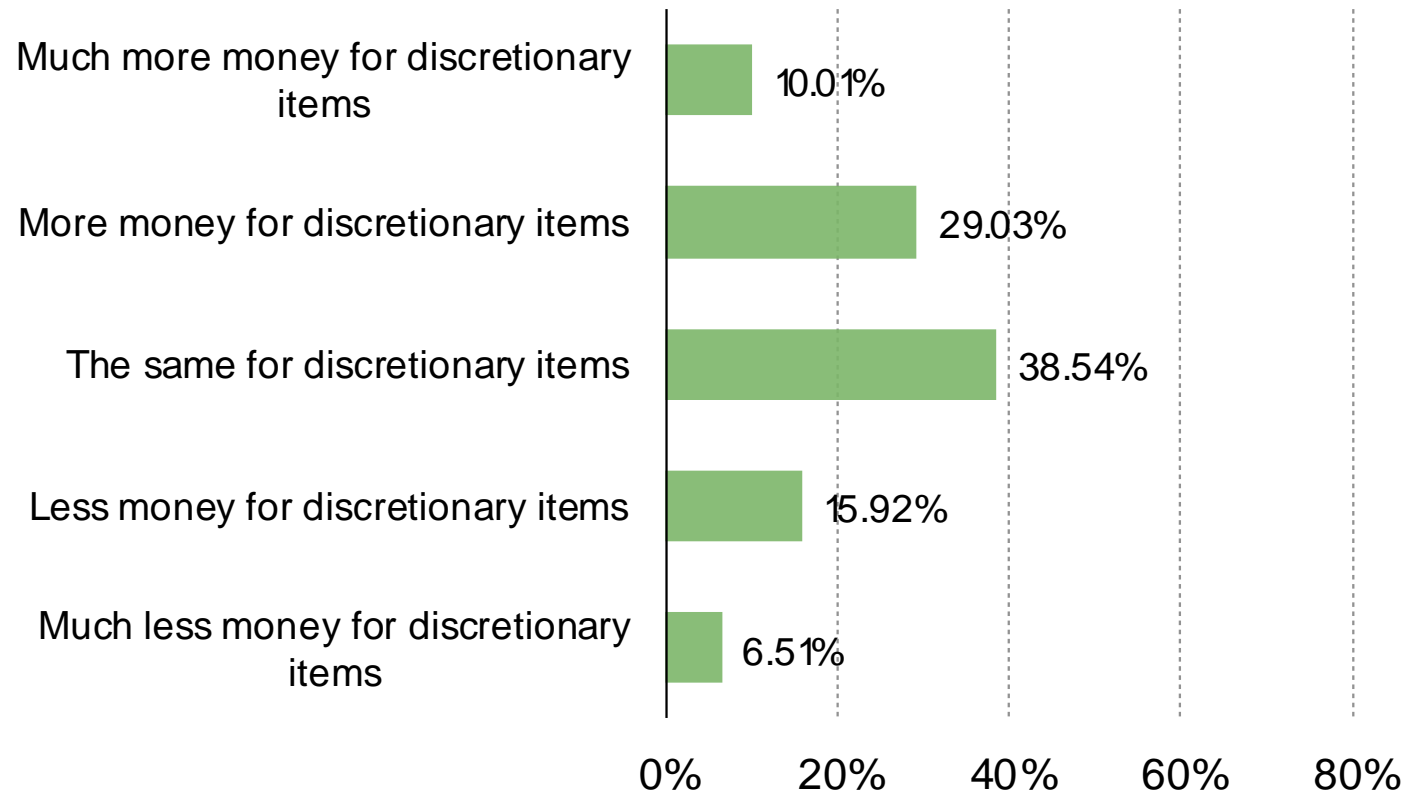
Please rate how much you agree with the following statement: “I am living paycheck to paycheck”

Posed to the target audience (1000 respondents who bought Juul in the past year)



Compared to one year ago, has the amount of money you have to spend on discretionary items (non-essential) changed?

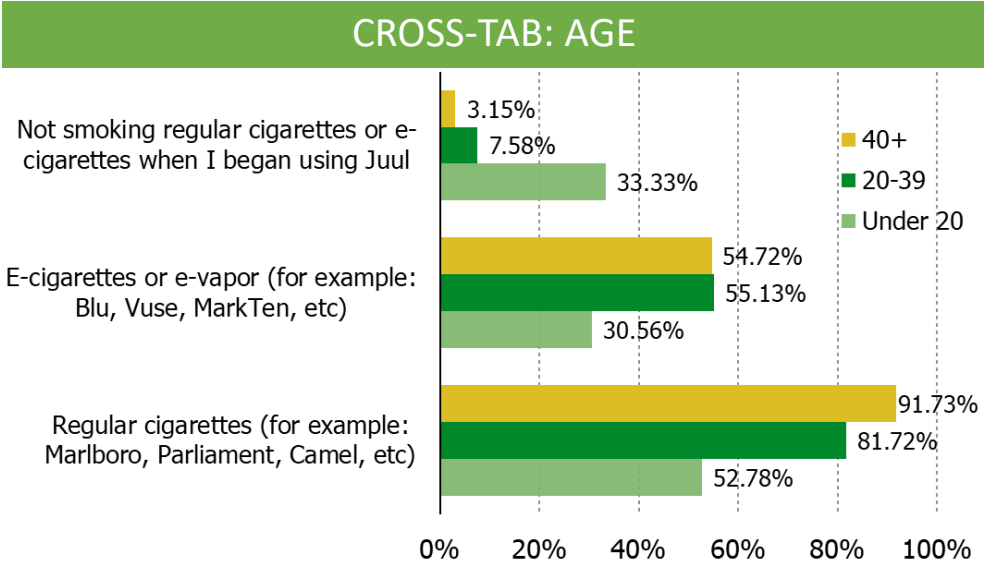
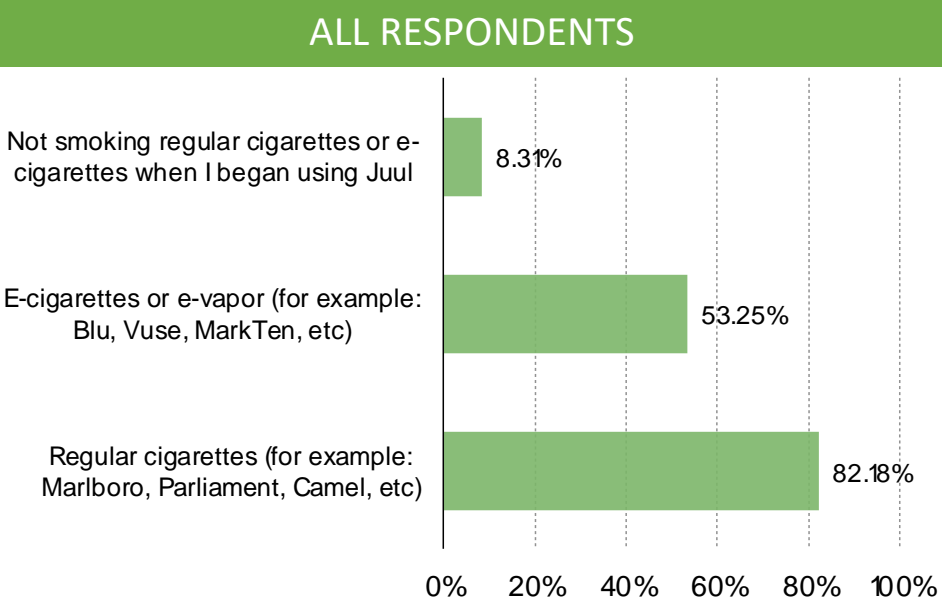
Posed to the target audience (1000 respondents who bought Juul in the past year)



TARGET AUDIENCE (RESPONDENTS BOUGHT JUUL IN THE PAST YEAR)
CIGARETTE AND E-CIGARETTE QUESTIONS

Prior to purchasing Juul for the first time, were you regularly smoking any of the below? Please select all that apply

Posed to the target audience (1000 respondents who bought Juul in the past year)

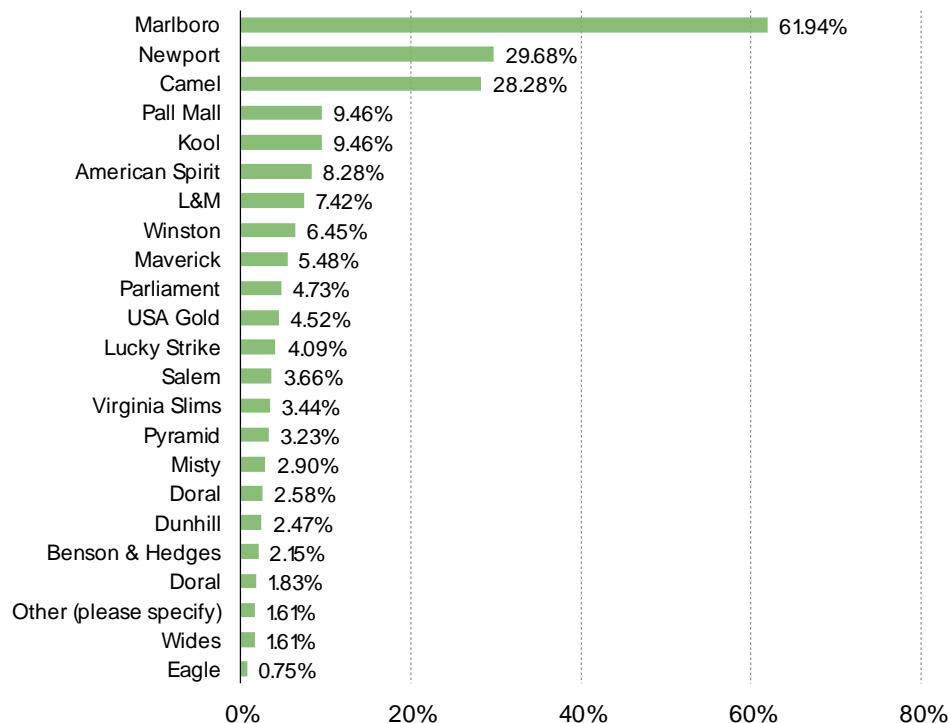


Cigarette and E-Cigarette Questions

What brand(s) of regular cigarettes have you regularly smoked over the last 5 years? Please select up to 3 brands

Posed to the target audience (1000 respondents who bought Juul in the past year) who consider themselves regular smokers at some point in the last 5 years.

ALL RESPONDENTS



n = 930

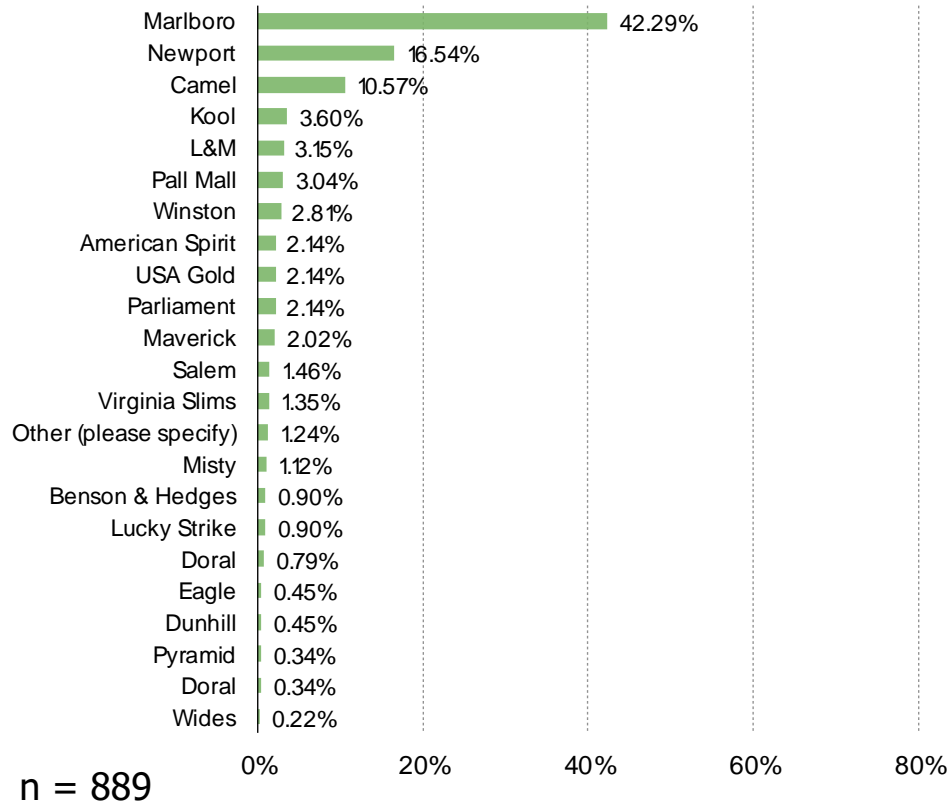
CROSS-TAB: AGE

	Under 20	20-39	40+
Marlboro	58.49%	60.61%	66.00%
Camel	33.96%	31.10%	20.00%
Newport	18.87%	33.97%	21.20%
Parliament	1.89%	4.94%	4.80%
Kool	5.66%	9.89%	9.20%
Lucky Strike	5.66%	3.99%	4.00%
Pall Mall	5.66%	9.25%	10.80%
Winston	3.77%	5.42%	9.60%
Doral	3.77%	2.07%	0.80%
Maverick	3.77%	6.38%	3.60%
Salem	1.89%	4.31%	2.40%
Virginia Slims	3.77%	3.83%	2.40%
Dunhill	0.00%	3.19%	1.20%
Misty	5.66%	3.19%	1.60%
Doral	3.77%	2.55%	2.40%
L&M	9.43%	8.45%	4.40%
USA Gold	3.77%	5.42%	2.40%
Wides	0.00%	2.07%	0.80%
American Spirit	13.21%	7.97%	8.00%
Benson & Hedges	3.77%	1.91%	2.40%
Pyramid	1.89%	3.67%	2.40%
Eagle	1.89%	0.64%	0.80%
Other	5.66%	0.96%	2.40%

What has been the primary brand of regular cigarette you have smoked in the last month?

Posed to the target audience (1000 respondents who bought Juul in the past year) who have been regular smokers in the past 30 days.

ALL RESPONDENTS

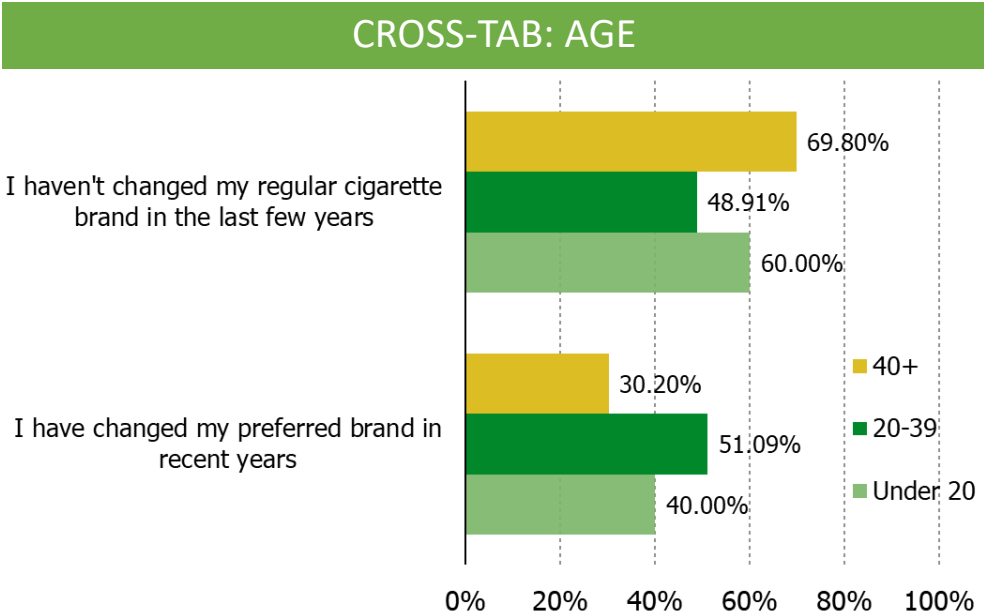
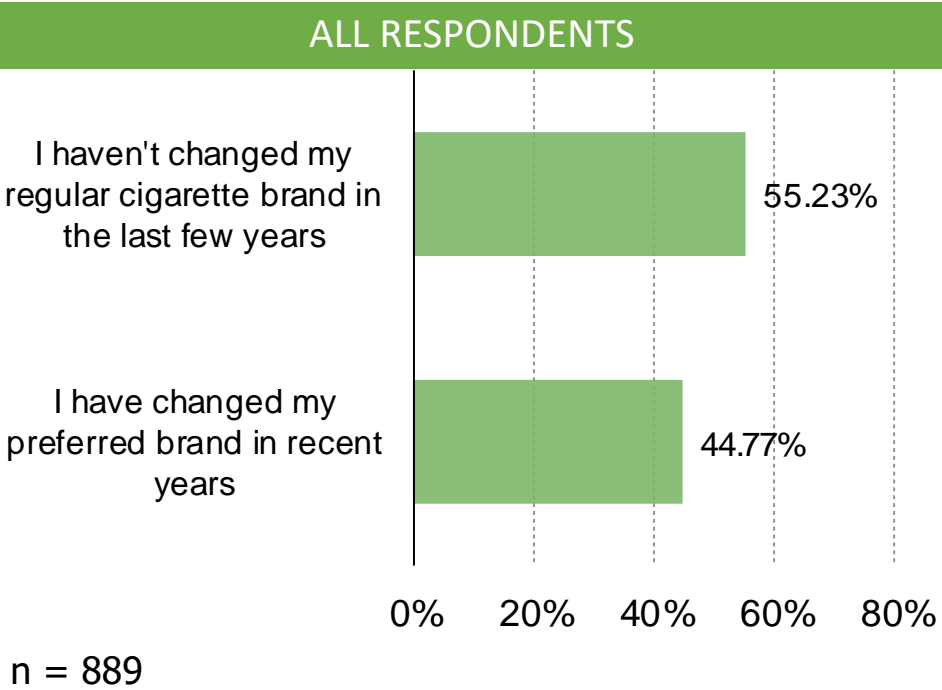


CROSS-TAB: AGE

	Under 20	20-39	40+
Marlboro	40.00%	39.23%	50.20%
Camel	15.56%	11.52%	7.35%
Newport	6.67%	19.53%	11.02%
Parliament	0.00%	2.34%	2.04%
Kool	0.00%	3.84%	3.67%
Lucky Strike	2.22%	0.83%	0.82%
Pall Mall	2.22%	2.17%	5.31%
Winston	4.44%	1.84%	4.90%
Doral	0.00%	0.17%	0.82%
Maverick	4.44%	2.34%	0.82%
Salem	2.22%	1.84%	0.41%
Virginia Slims	0.00%	1.34%	1.63%
Dunhill	0.00%	0.50%	0.41%
Misty	0.00%	0.83%	2.04%
Doral	0.00%	0.83%	0.82%
L&M	8.89%	3.67%	0.82%
USA Gold	4.44%	2.34%	1.22%
Wides	0.00%	0.33%	0.00%
American Spirit	2.22%	2.34%	1.63%
Benson & Hedges	0.00%	0.83%	1.22%
Pyramid	0.00%	0.33%	0.41%
Eagle	0.00%	0.33%	0.82%
Other	6.67%	0.67%	1.63%

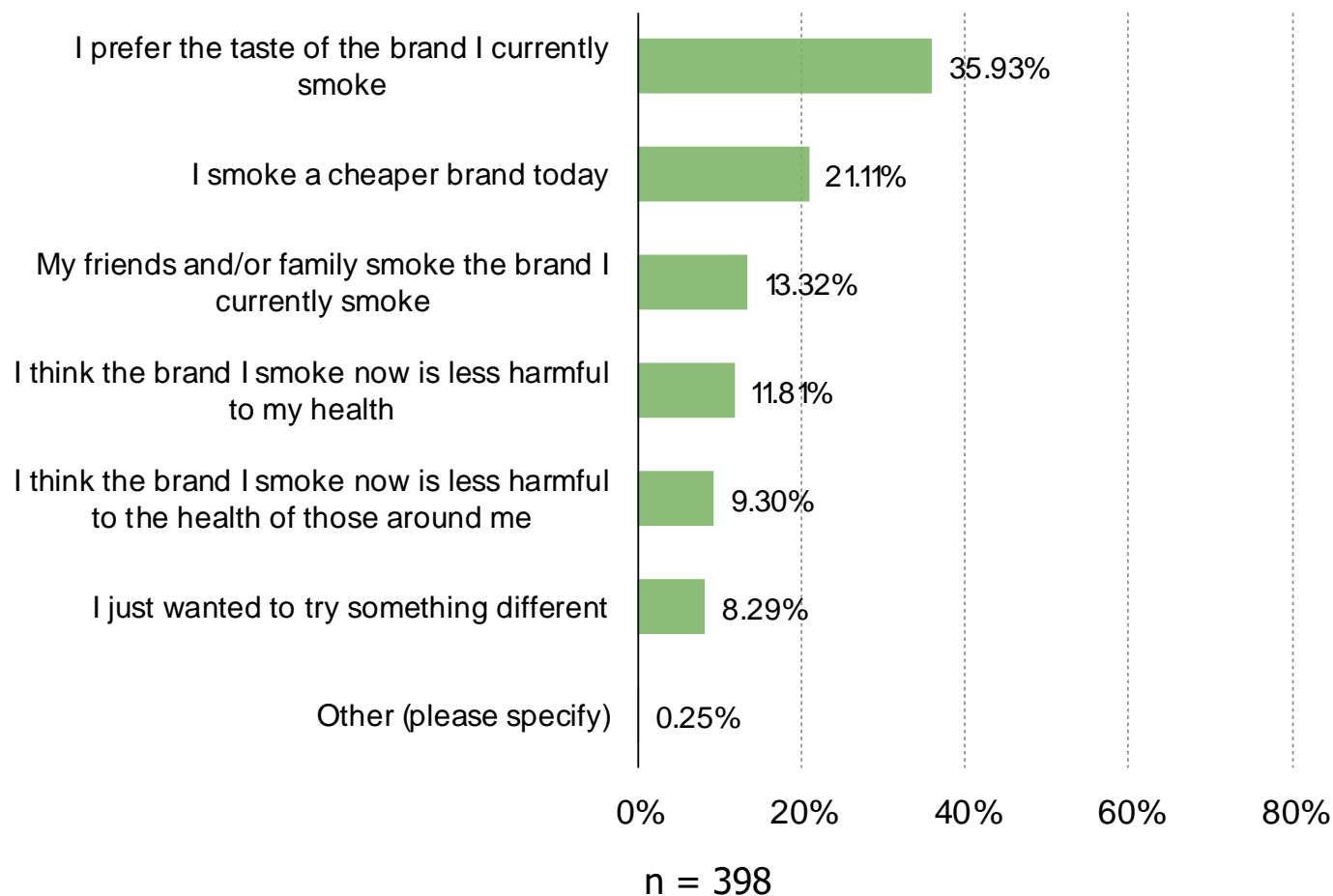
Has your preference in regular cigarette brand changed in recent years or have you always stuck to one brand?

Posed to the target audience (1000 respondents who bought Juul in the past year) who have been regular smokers in the past 30 days.



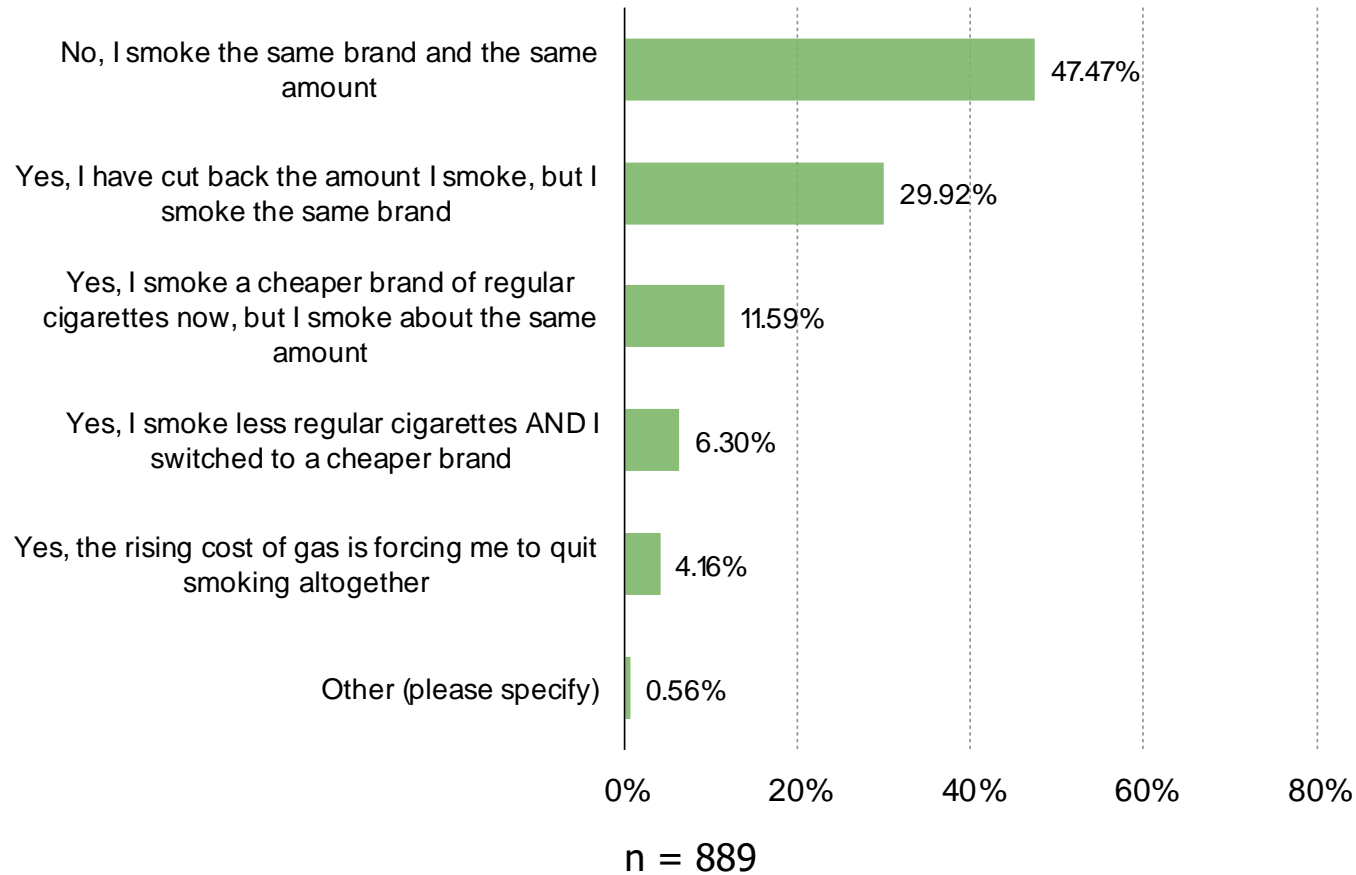
What is the primary reason why you have switched brands?

Posed to the target audience (1000 respondents who bought Juul in the past year) who have been regular smokers in the past 30 days **who have switched brands**.



Has the rising cost of gas caused you to change your regular cigarette consumption? Please select the best option:

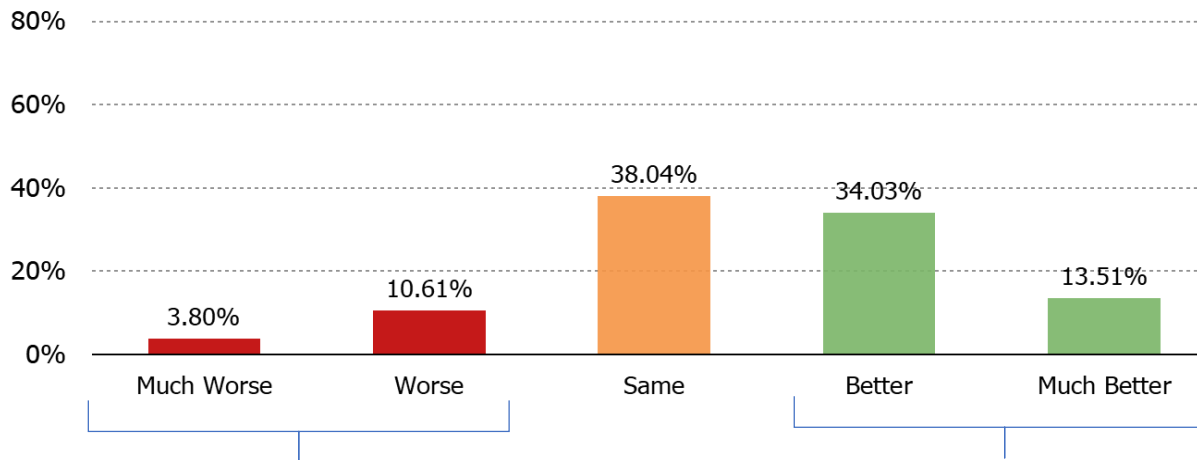
Posed to the target audience (1000 respondents who bought Juul in the past year) who have been regular smokers in the past 30 days.



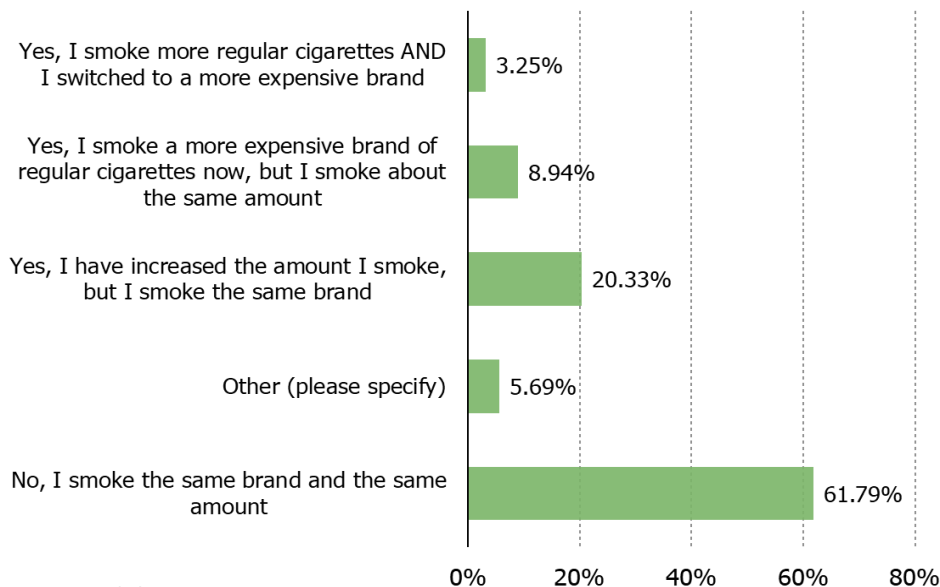
Has the change in your financial position caused you to change your regular cigarette consumption over the last year? Please select the best option:

Posed to the target audience (1000 respondents who bought Juul in the past year) who have been regular smokers in the past 30 days.

Financial Position Changes In Last Year:

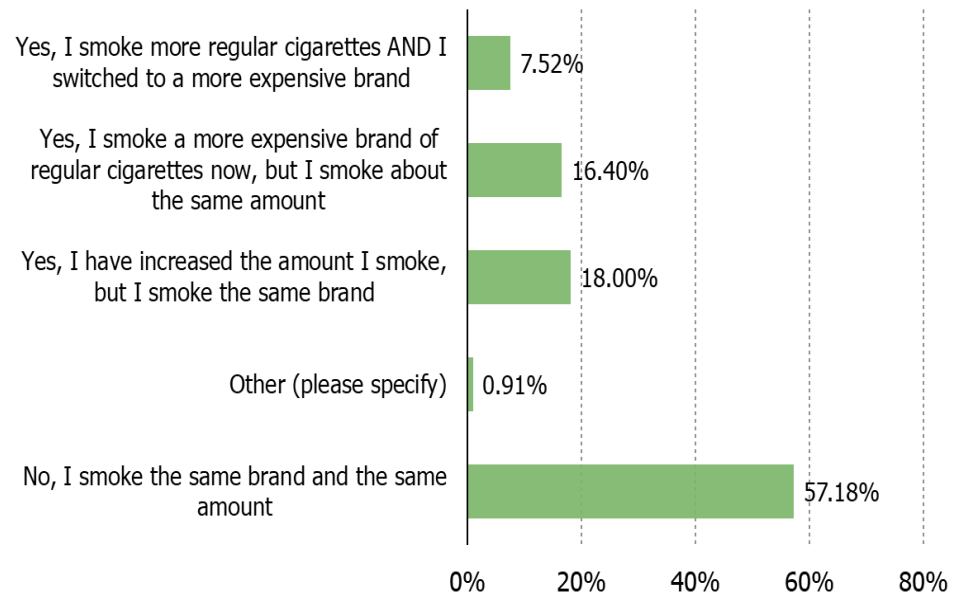


FINANCIAL POSITION WORSENE



n = 123

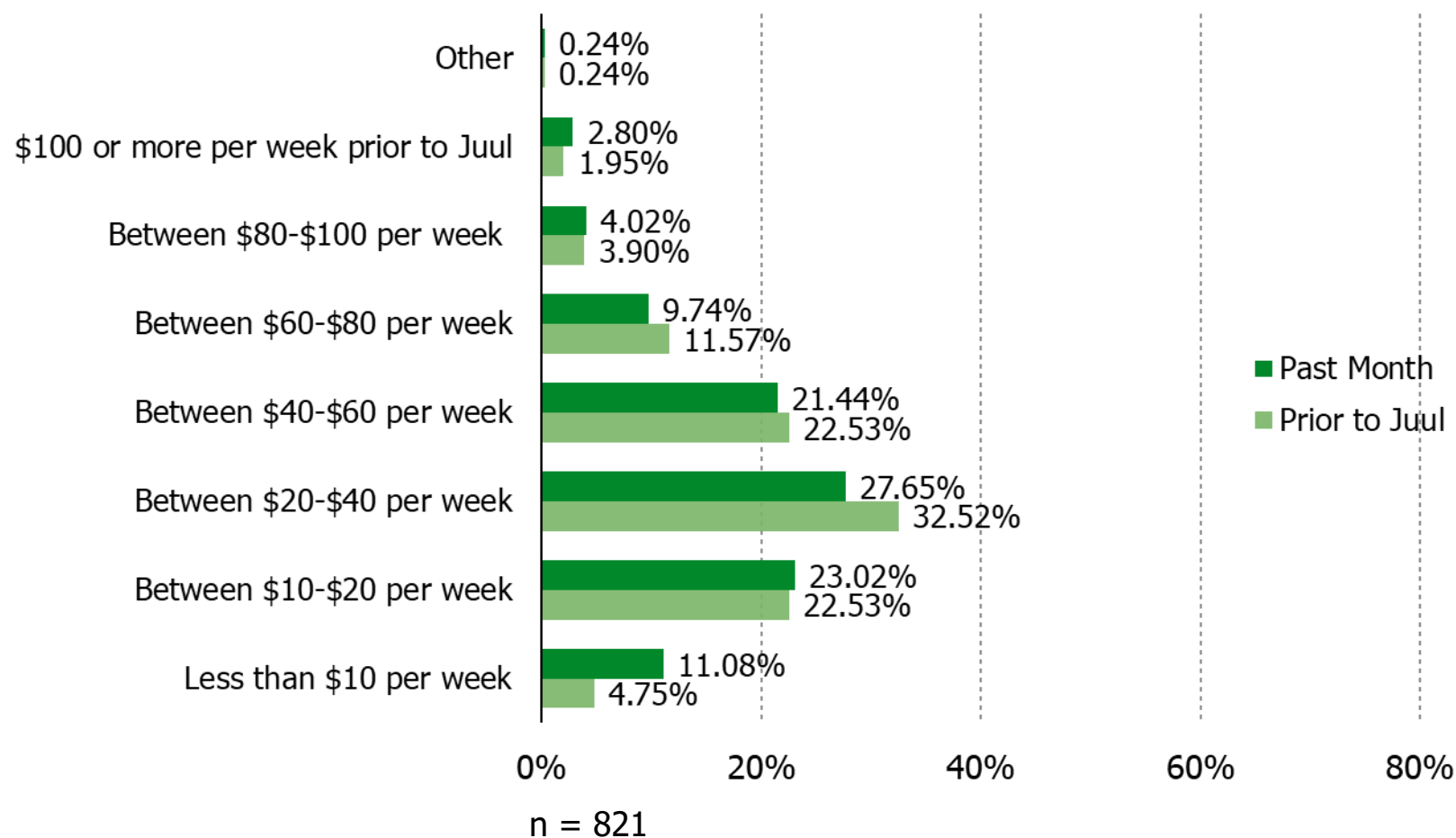
FINANCIAL POSITION IMPROVED



n = 439

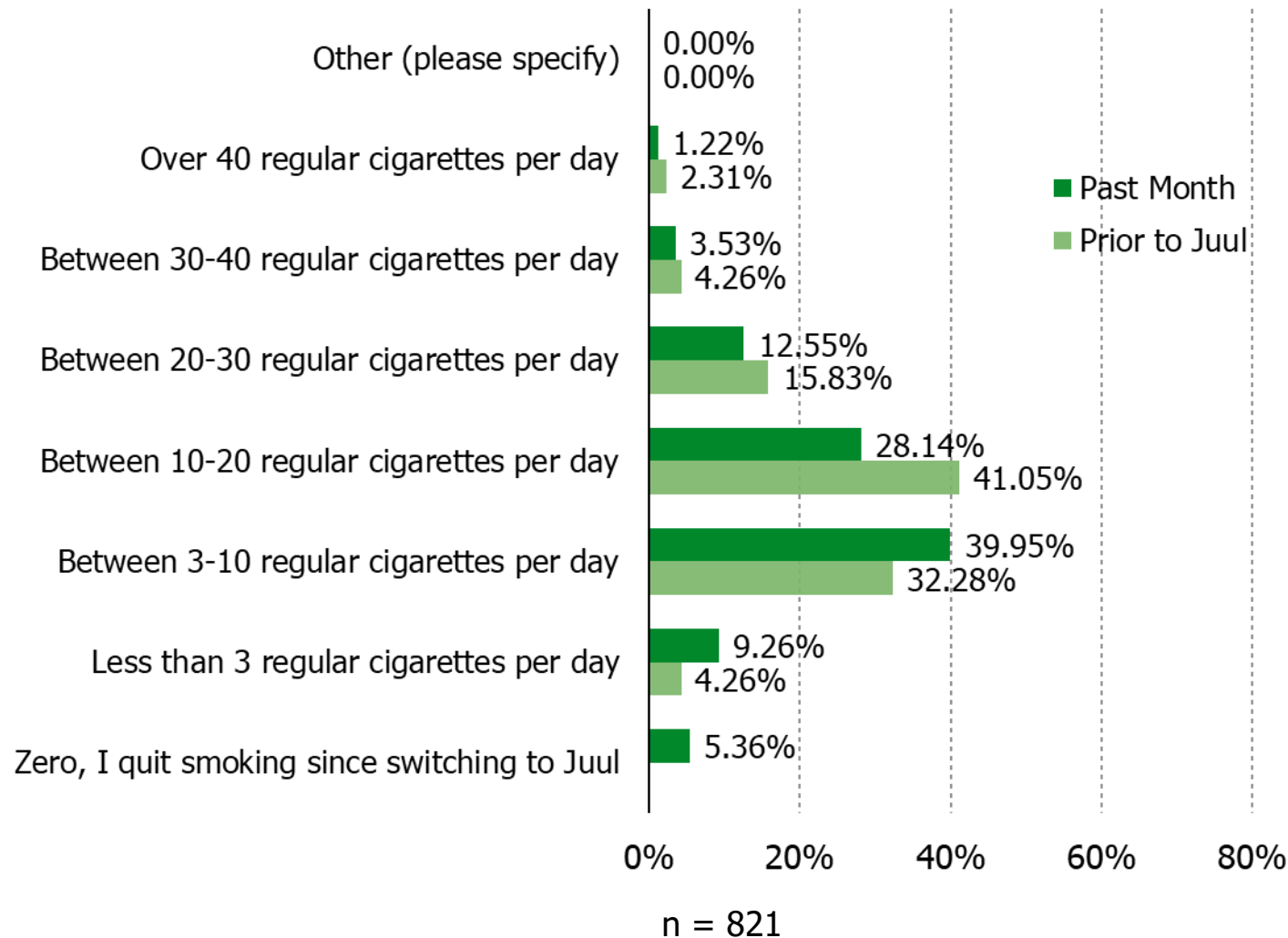
How much did you spend on cigarettes in the past month vs. prior to Juul, how much did you spend on cigarettes per week?

Posed to the target audience (1000 respondents who bought Juul in the past year) who smoked regular cigarettes prior to purchasing Juul.



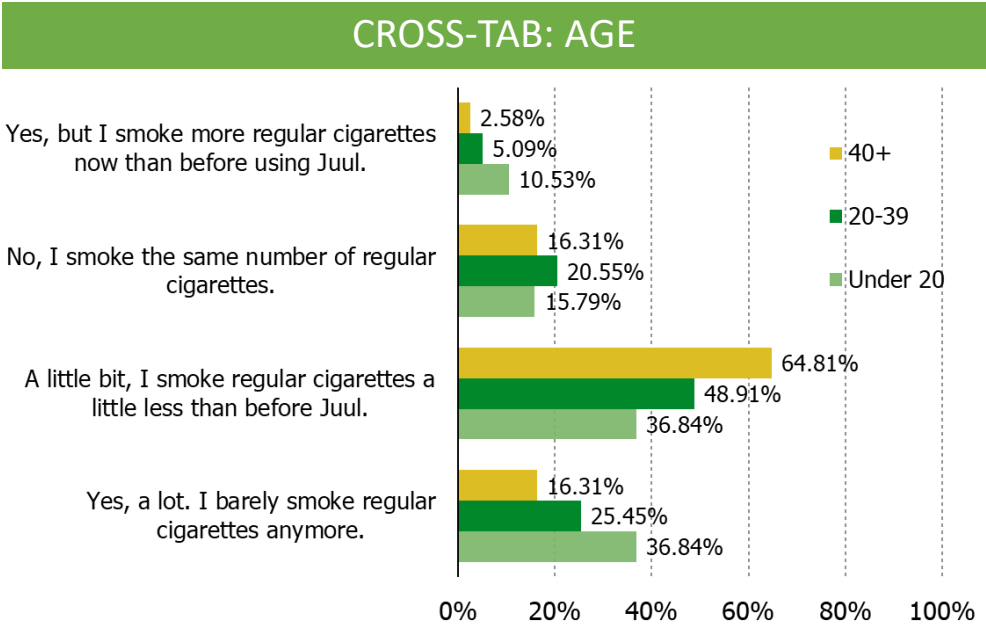
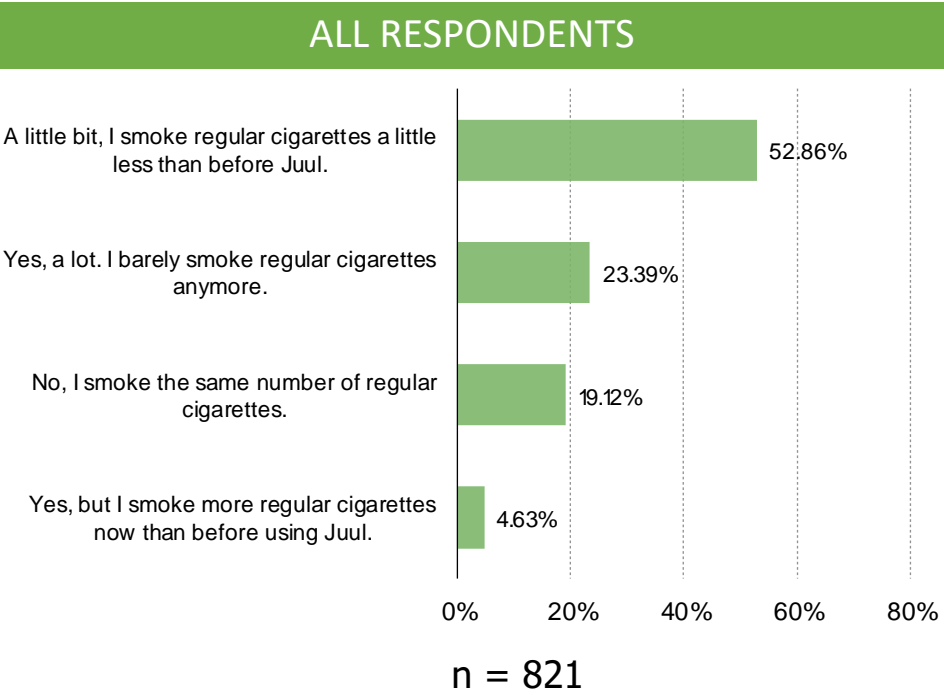
How many regular cigarettes do you currently smoke per day vs. how many regular cigarettes did you smoke per day prior to starting to use Juul?

Posed to the target audience (1000 respondents who bought Juul in the past year) who smoked regular cigarettes prior to purchasing Juul.



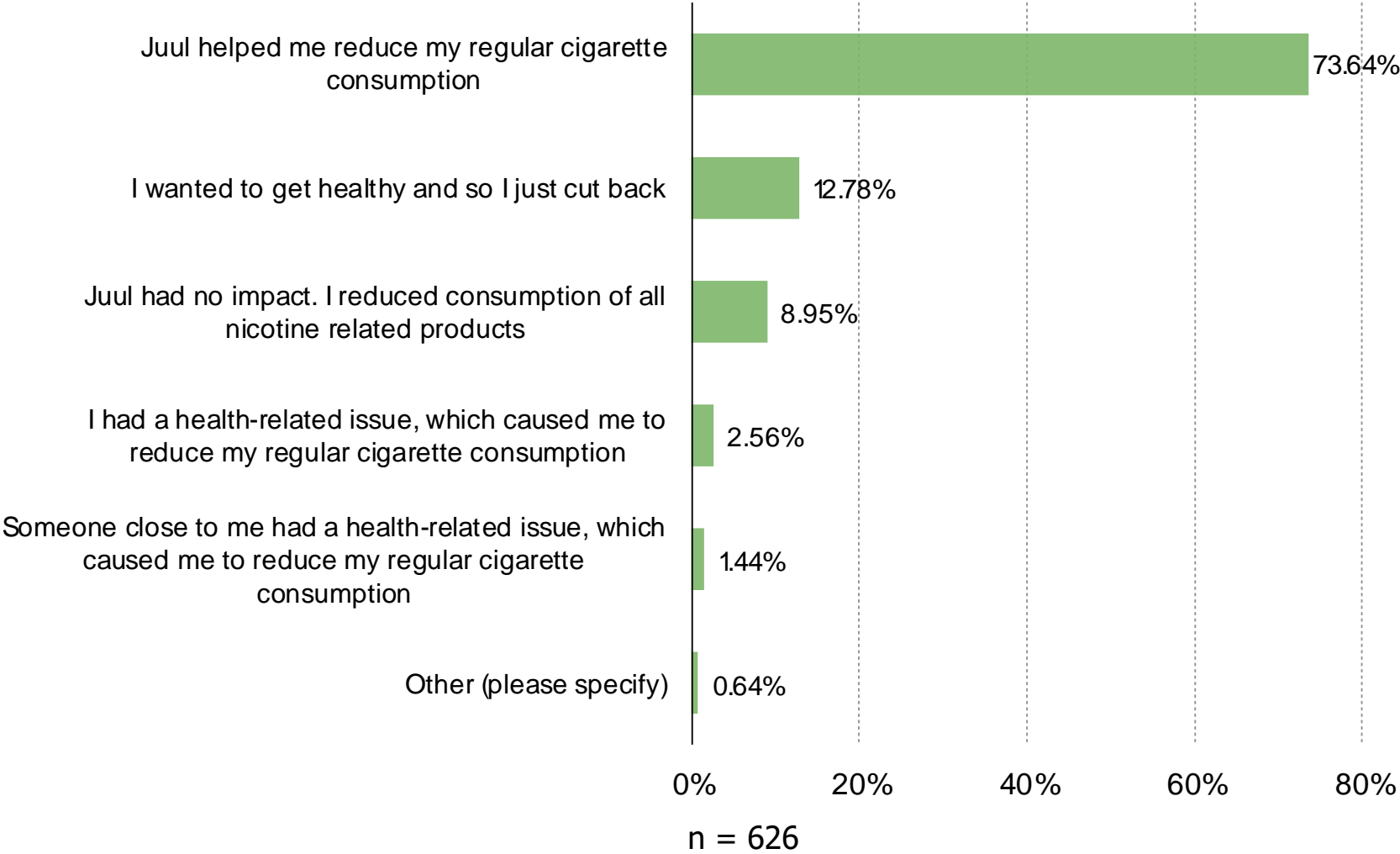
Has using Juul impacted the amount of regular cigarettes you smoke today?

Posed to the target audience (1000 respondents who bought Juul in the past year) who smoked regular cigarettes prior to purchasing Juul.



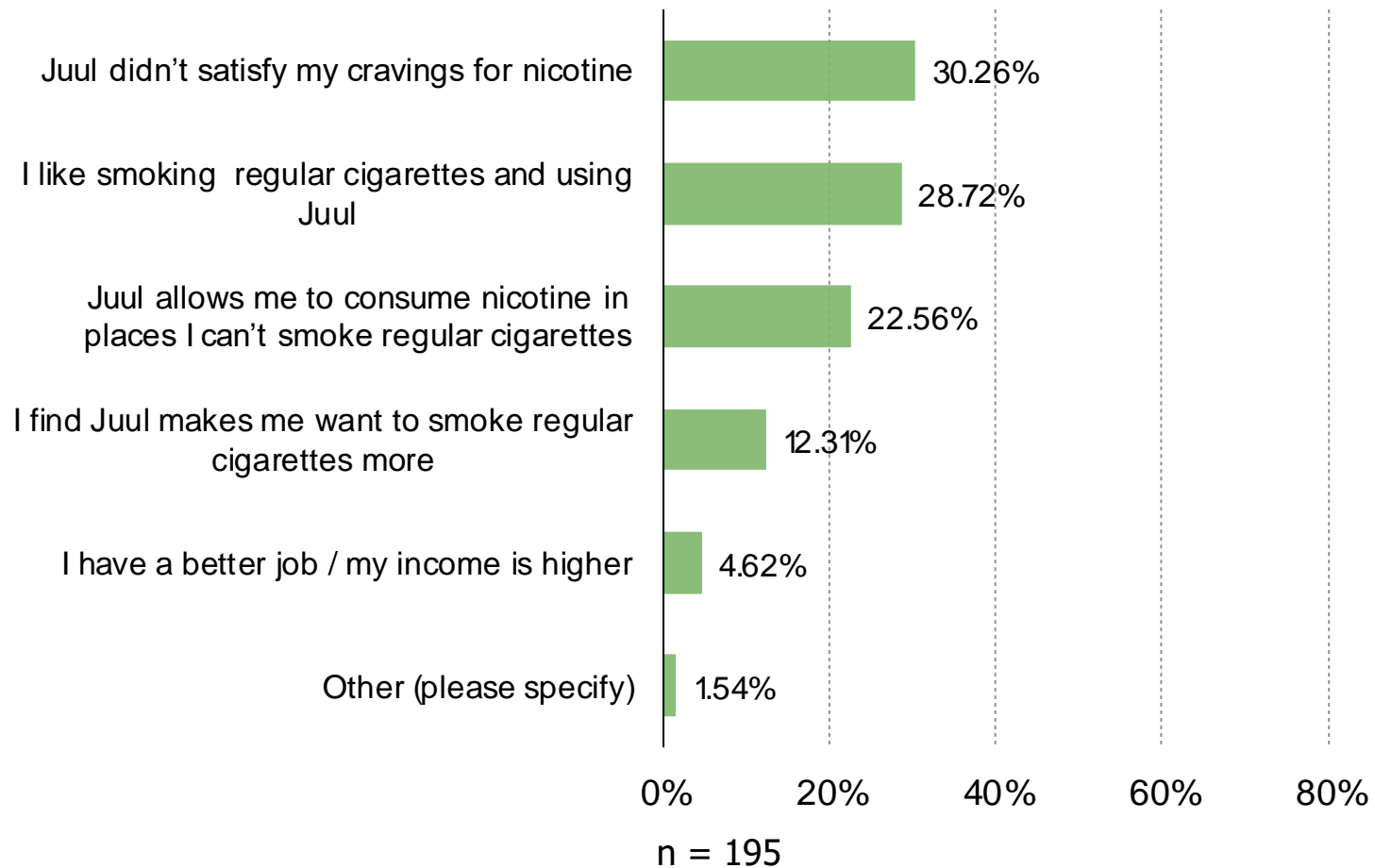
Please describe why you are smoking less regular cigarettes today after first purchasing Juul?

Posed to the target audience (1000 respondents who bought Juul in the past year) who smoked regular cigarettes prior to purchasing Juul who are also smoking less regular cigarettes than before.



Please describe why you are still smoking roughly the same amount or more regular cigarettes versus prior to Juul?

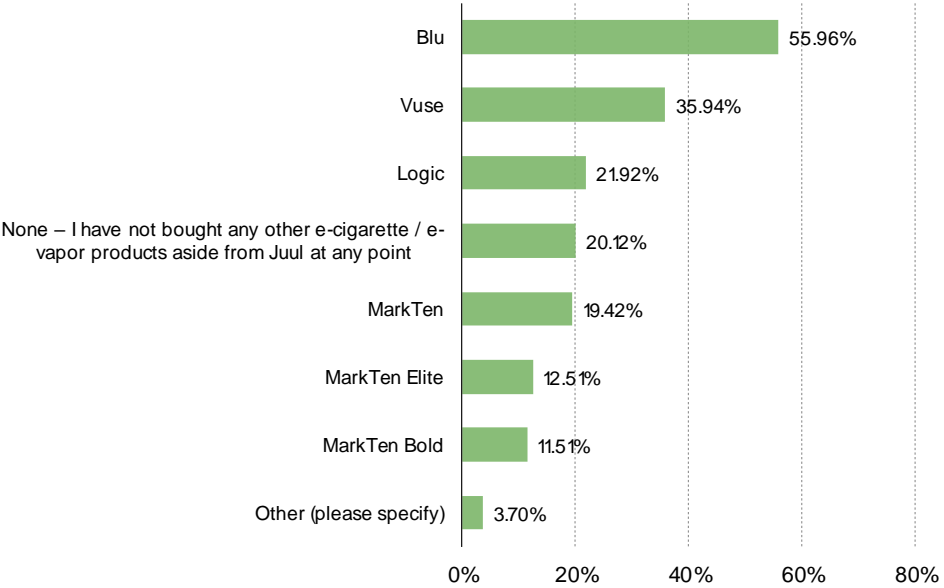
Posed to the target audience (1000 respondents who bought Juul in the past year) who smoked regular cigarettes prior to purchasing Juul who are also smoking the same or more regular cigarettes than before.



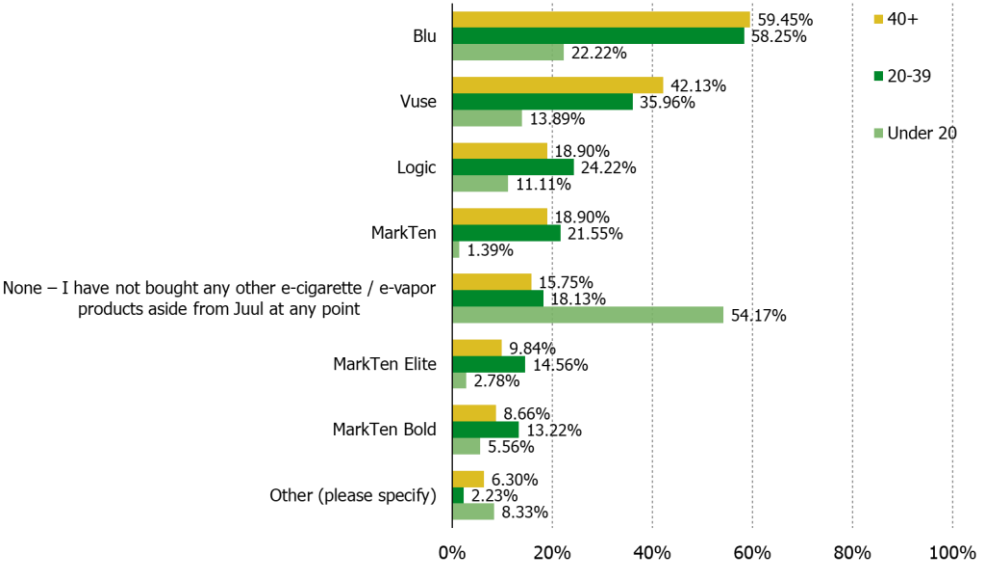
Aside from Juul, what e-cigarette and/or e-vapor products have you purchased in your life? Please select all that apply

Posed to the target audience (1000 respondents who bought Juul in the past year).

ALL RESPONDENTS

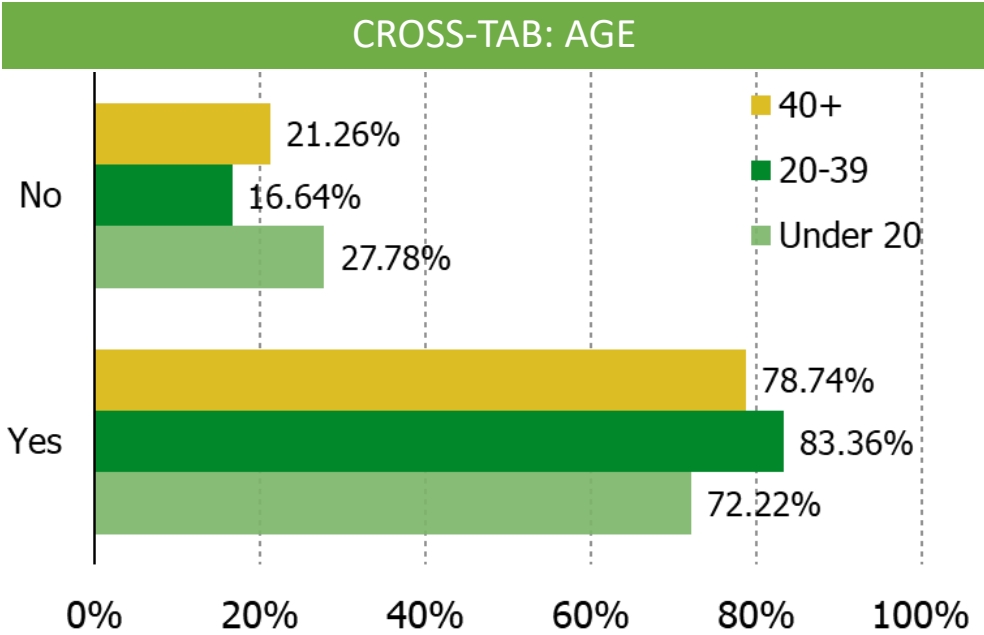
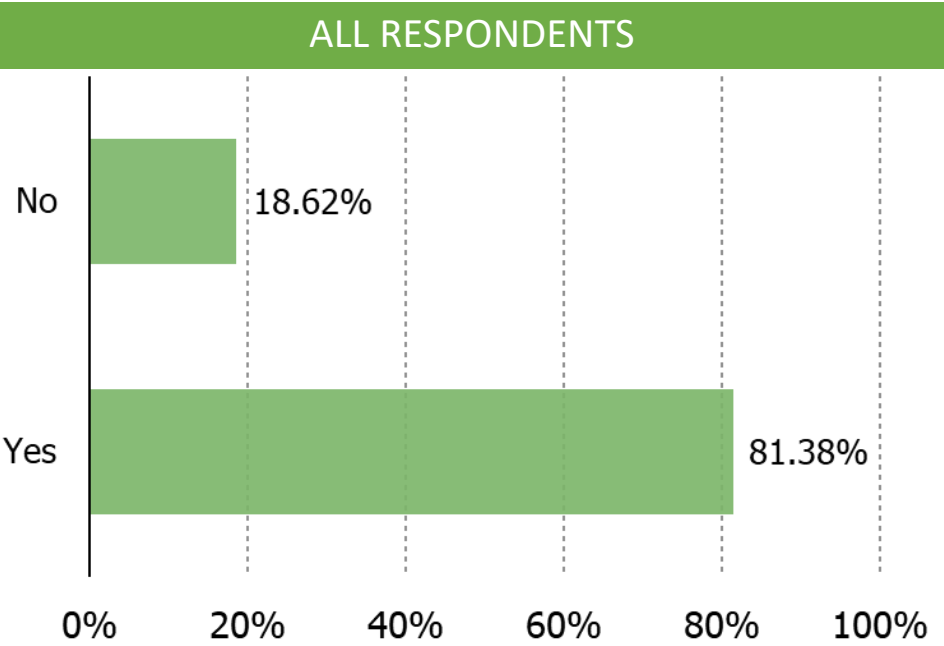


CROSS-TAB: AGE



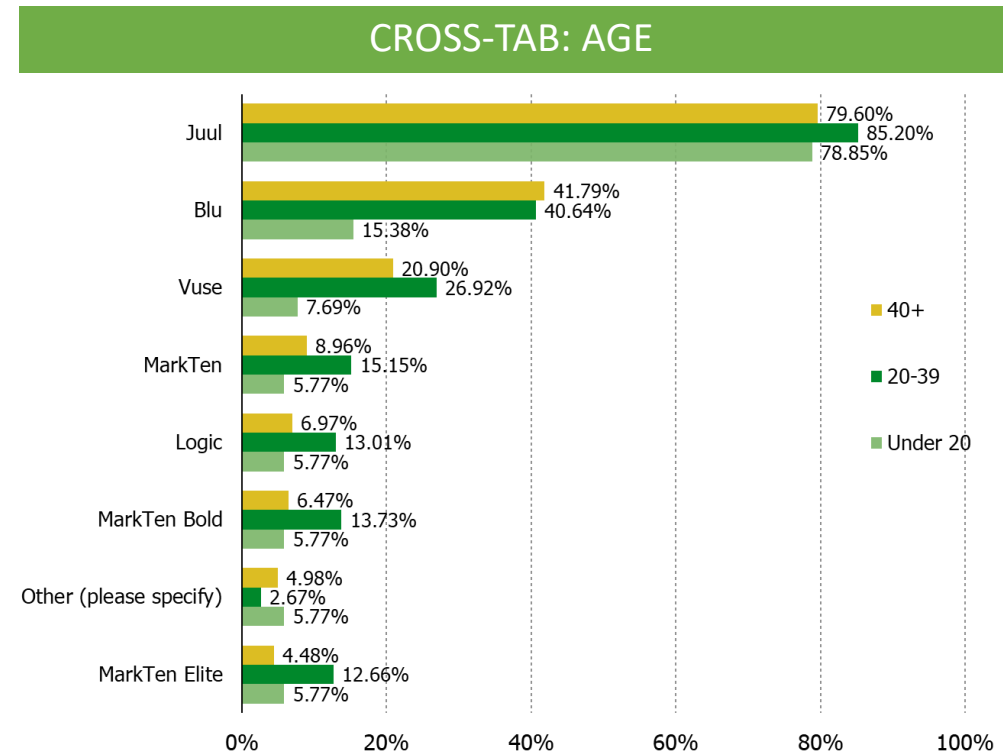
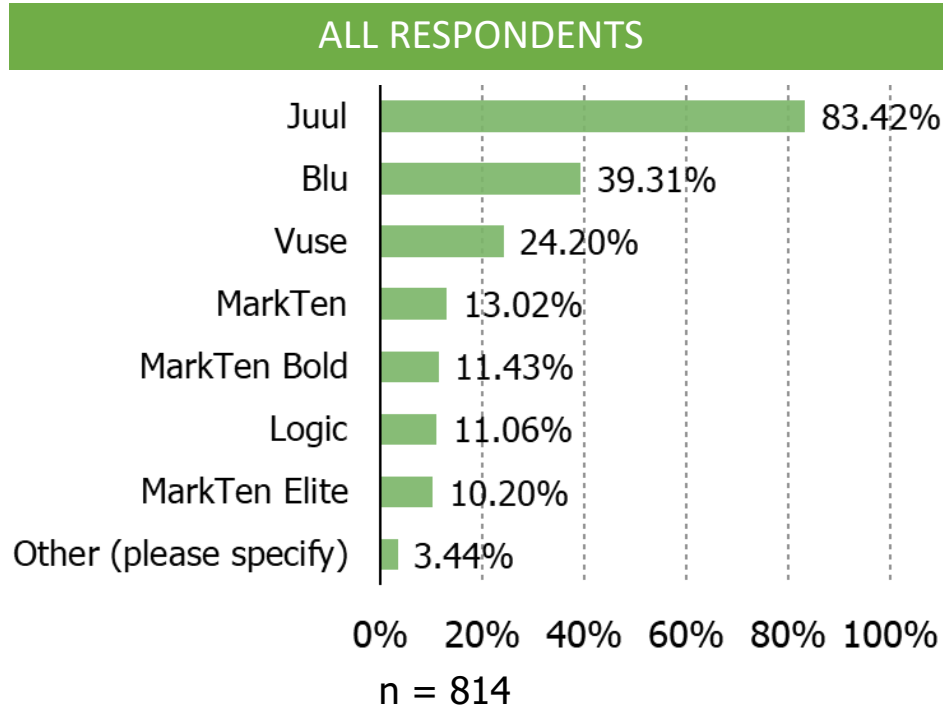
Do you currently use any e-cigarette and/or e-vapor products?

Posed to the target audience (1000 respondents who bought Juul in the past year).



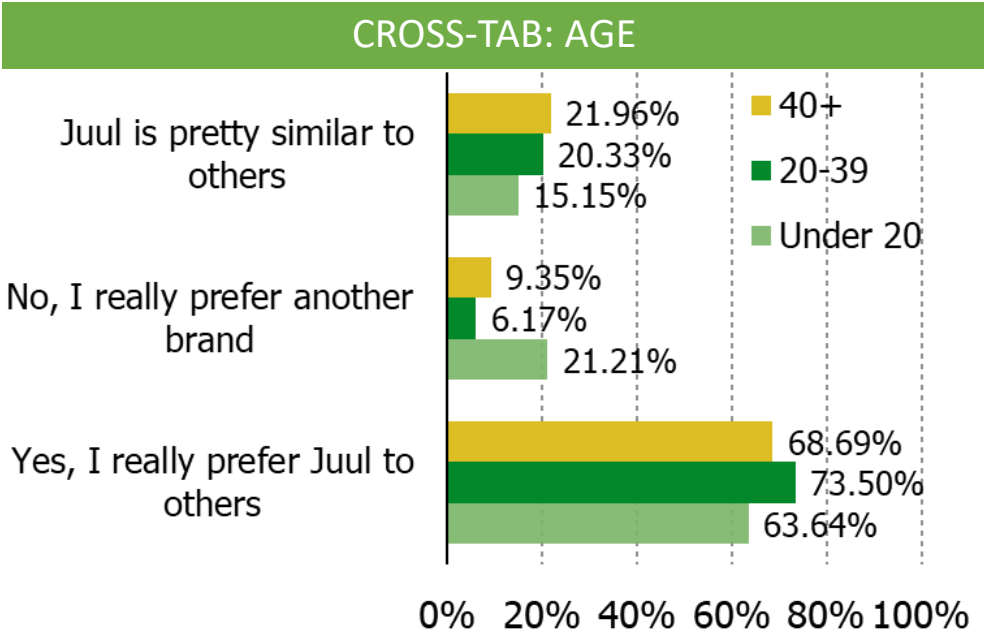
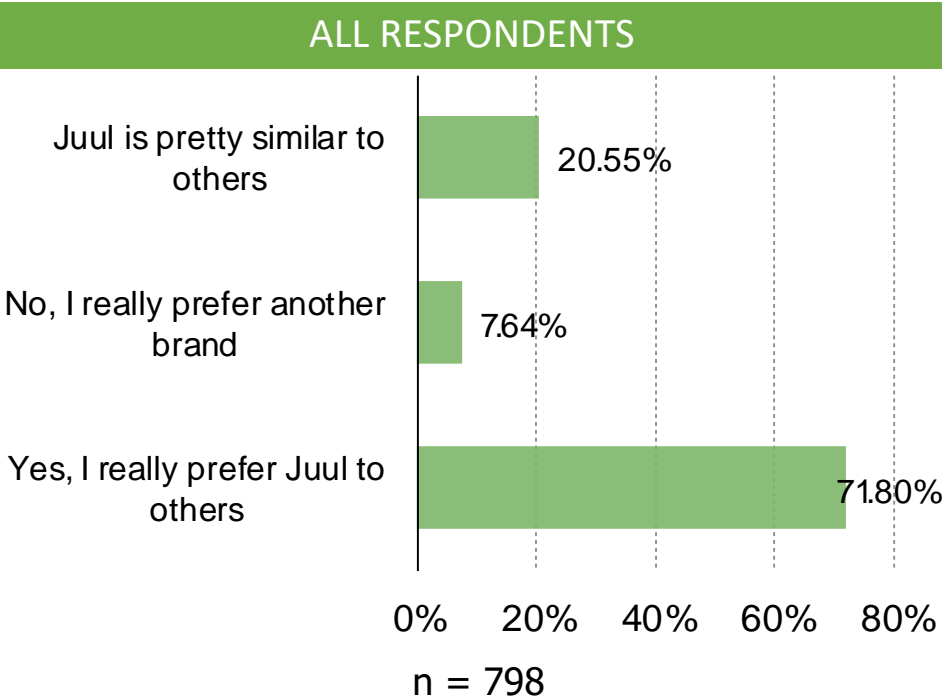
Which e-cigarette and/or e-vapor products do you currently smoke? Please select ALL that apply

Posed to the target audience (1000 respondents who bought Juul in the past year) who use an e-cigarette and/or e-vapor product.



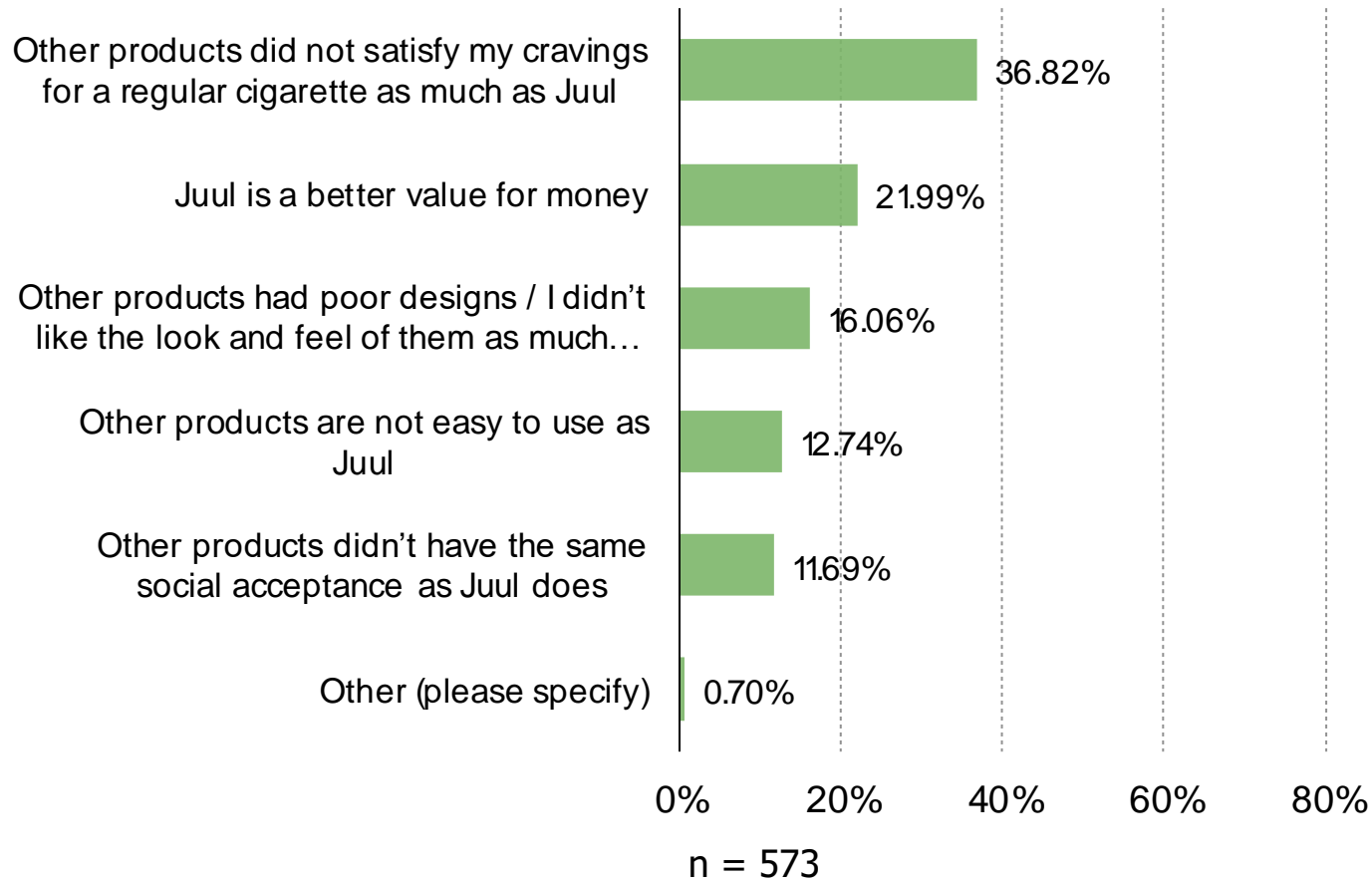
Do you prefer Juul to other e-cigarette / e-vapor products?

Posed to the target audience (1000 respondents who bought Juul in the past year) who have also purchased other brands beside Juul.



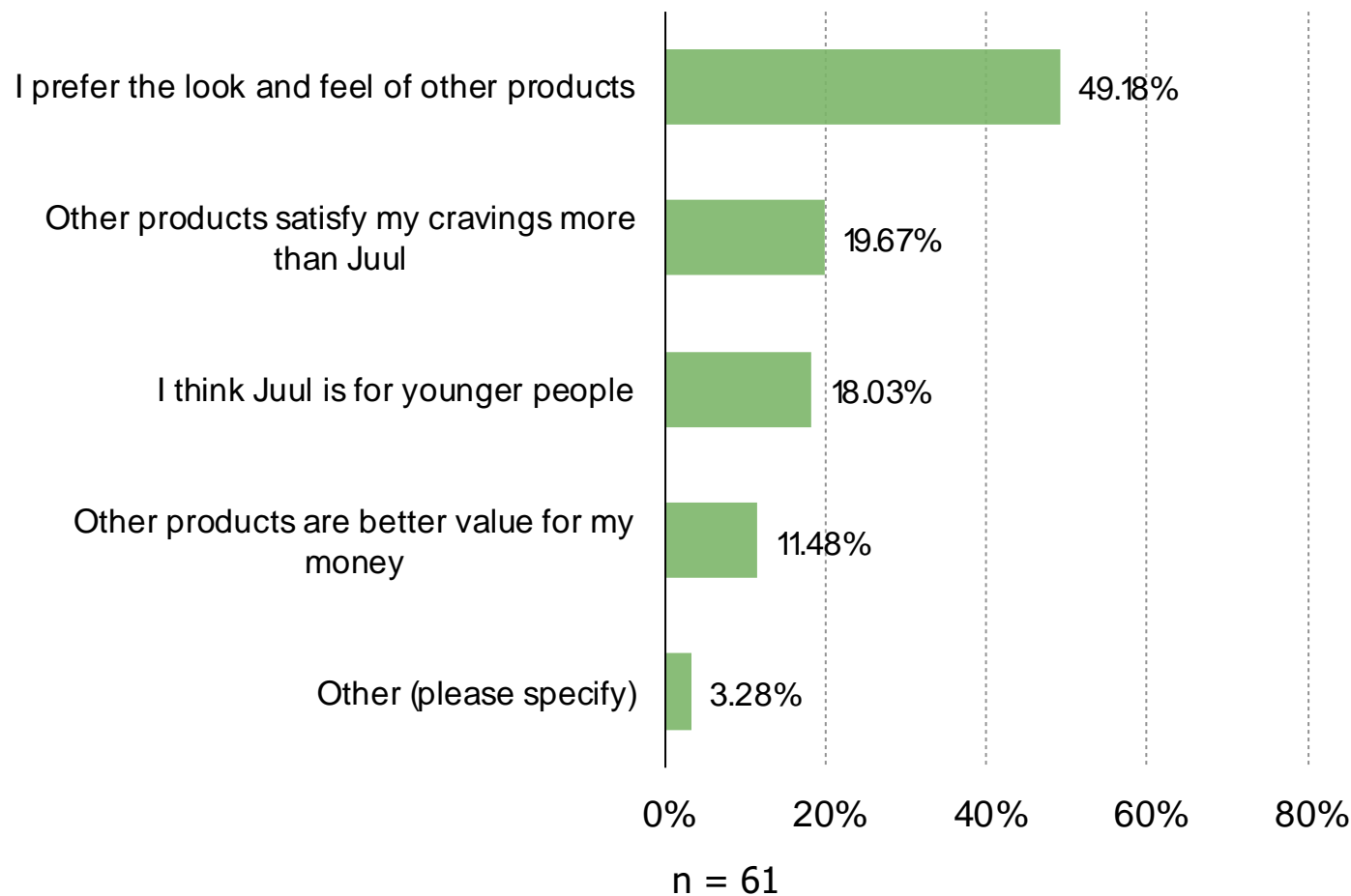
Why do you prefer Juul to other e-cigarette / e-vapor products?

Posed to the target audience (1000 respondents who bought Juul in the past year) who have also purchased other brands beside Juul but prefer Juul over other brands.



Why do you prefer other e-cigarette / e-vapor products over Juul?

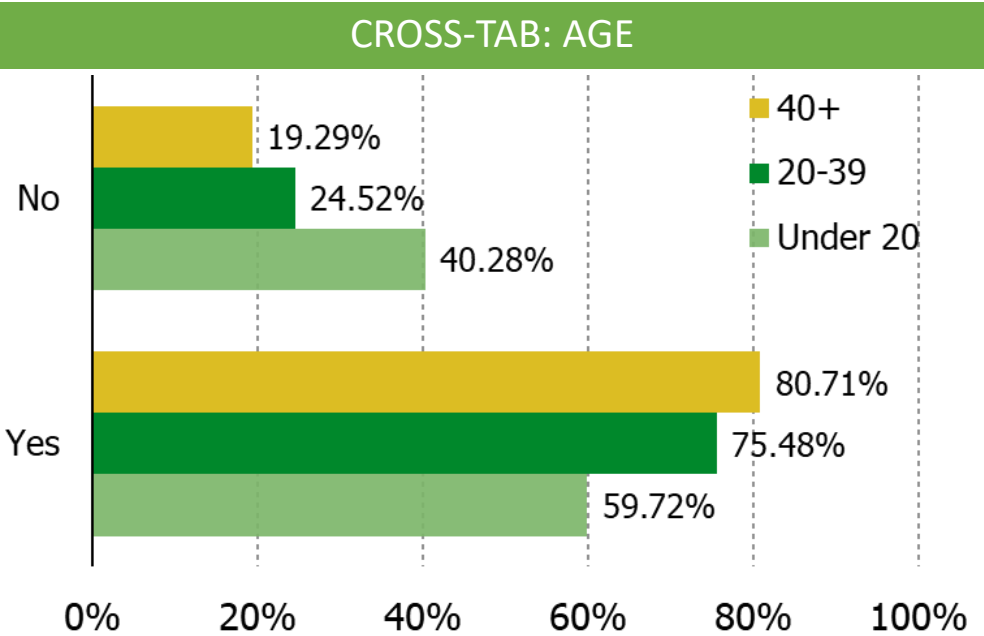
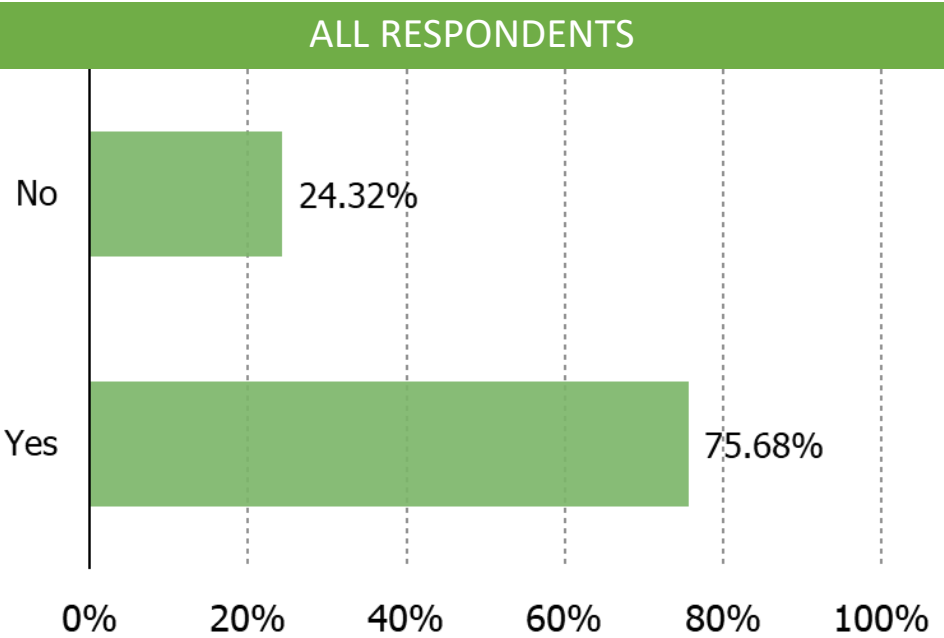
Posed to the target audience (1000 respondents who bought Juul in the past year) who have also purchased other brands beside Juul and prefer another brand.



TARGET AUDIENCE (RESPONDENTS BOUGHT JUUL IN THE PAST YEAR)
REGULAR CIGARETTE QUITTING QUESTIONS

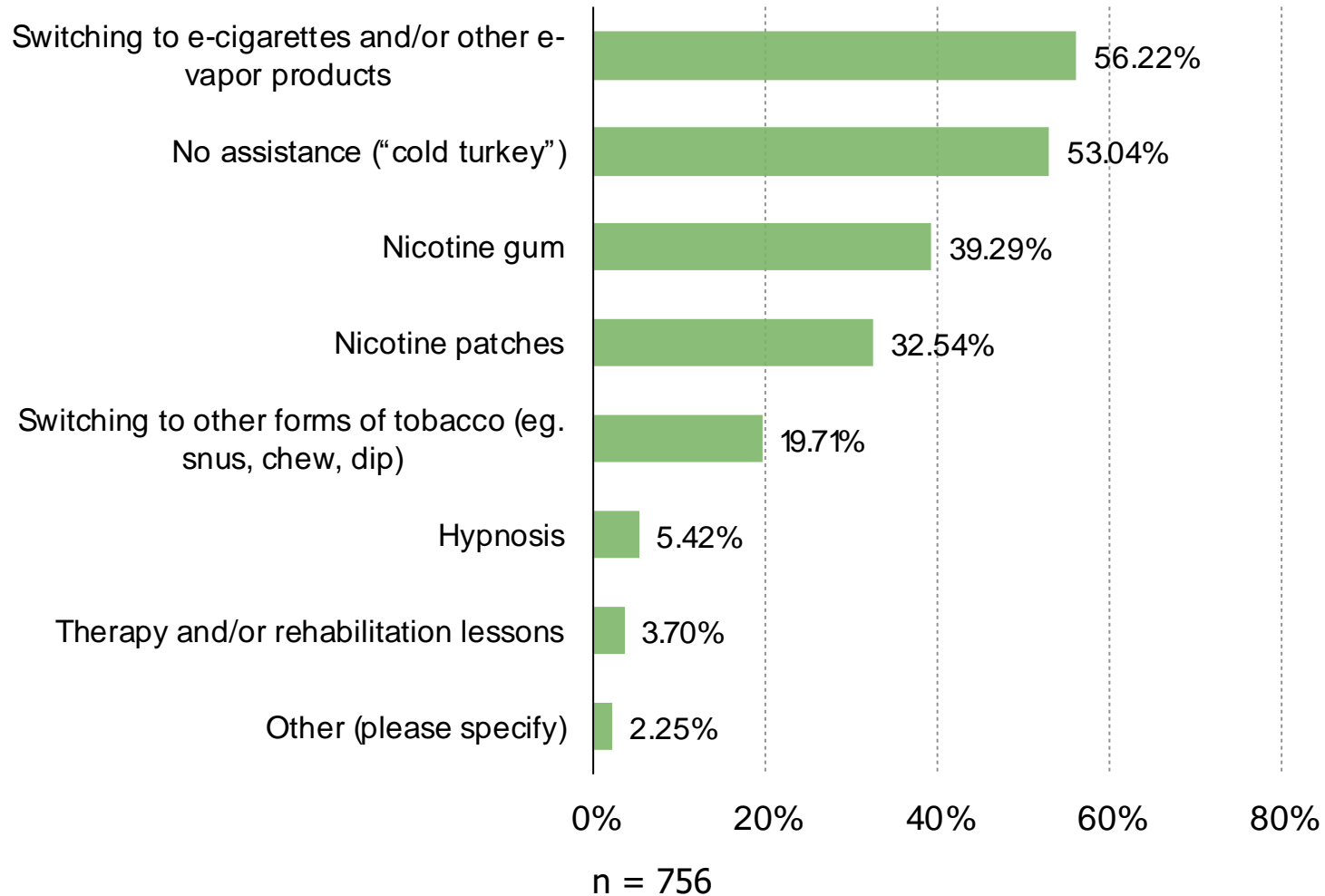
Have you ever attempted to quit smoking regular cigarettes?

Posed to the target audience (1000 respondents who bought Juul in the past year).



Please describe what methods you have used to try and quit smoking (select all that apply)

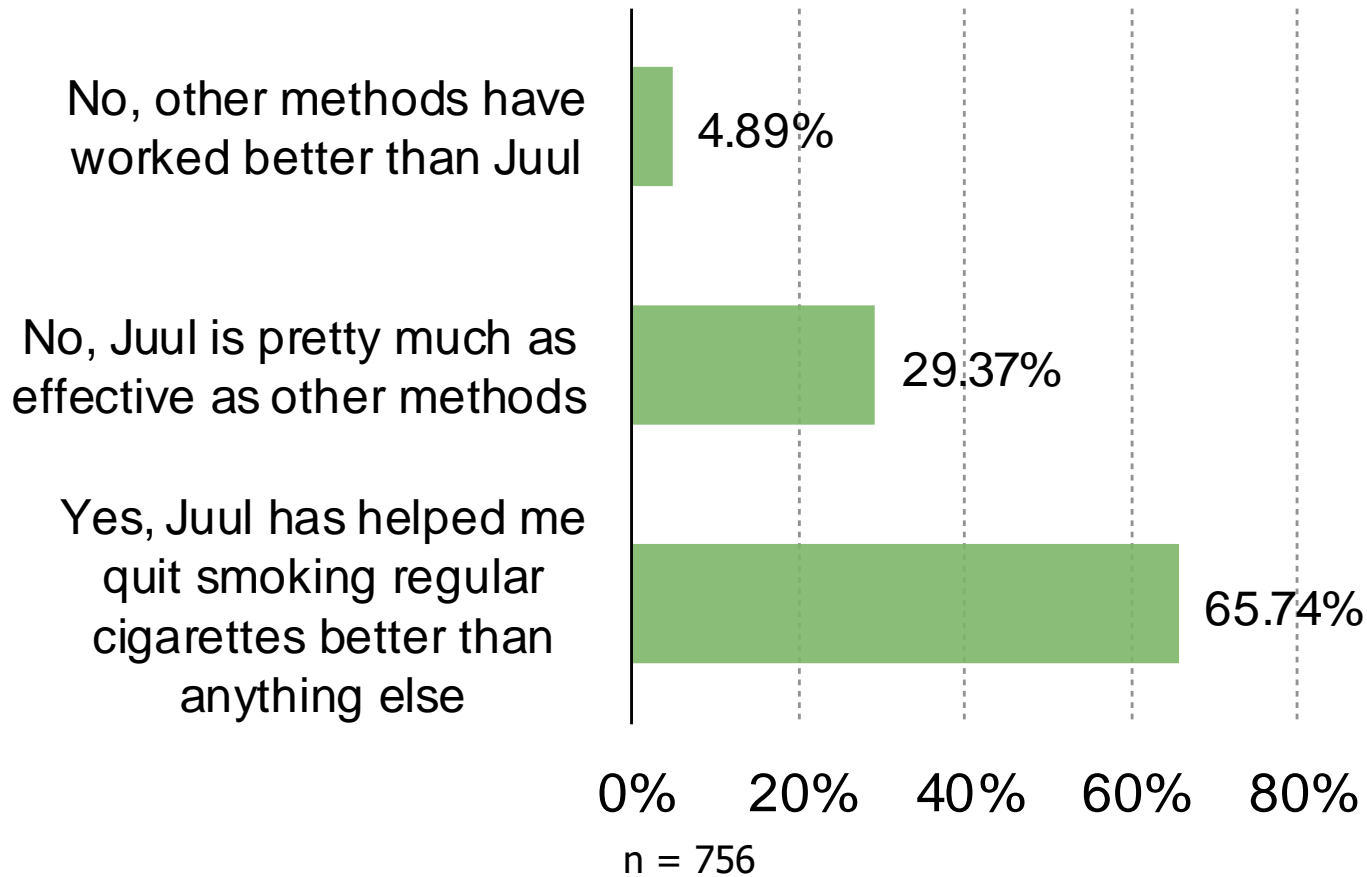
Posed to the target audience (1000 respondents who bought Juul in the past year) who have attempted to quit.



TARGET AUDIENCE (RESPONDENTS BOUGHT JUUL IN THE PAST YEAR)
JUUL USAGE QUESTIONS

Do you think Juul is more effective than other methods to quit smoking regular cigarettes?

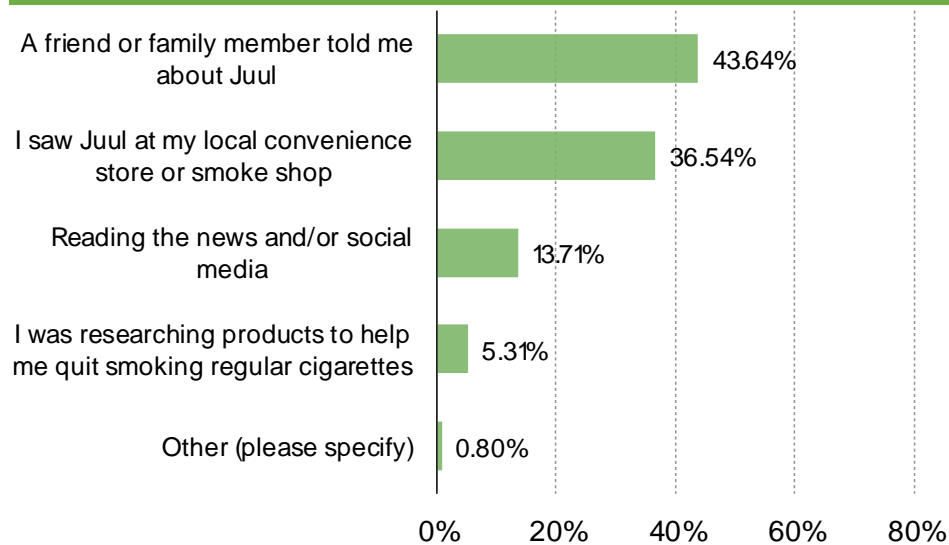
Posed to the target audience (1000 respondents who bought Juul in the past year) who have attempted to quit.



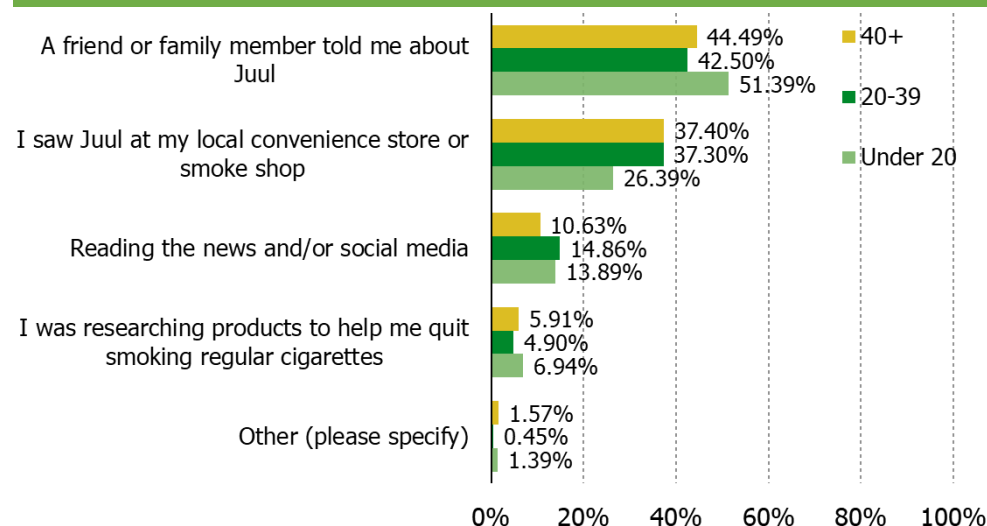
How did you first hear about Juul?

Posed to the target audience (1000 respondents who bought Juul in the past year).

ALL RESPONDENTS

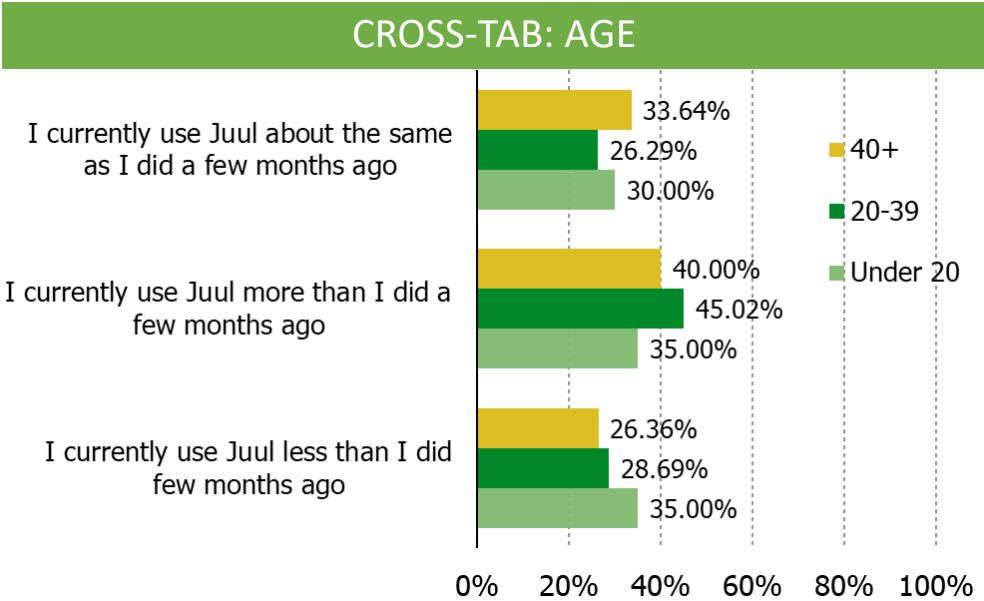
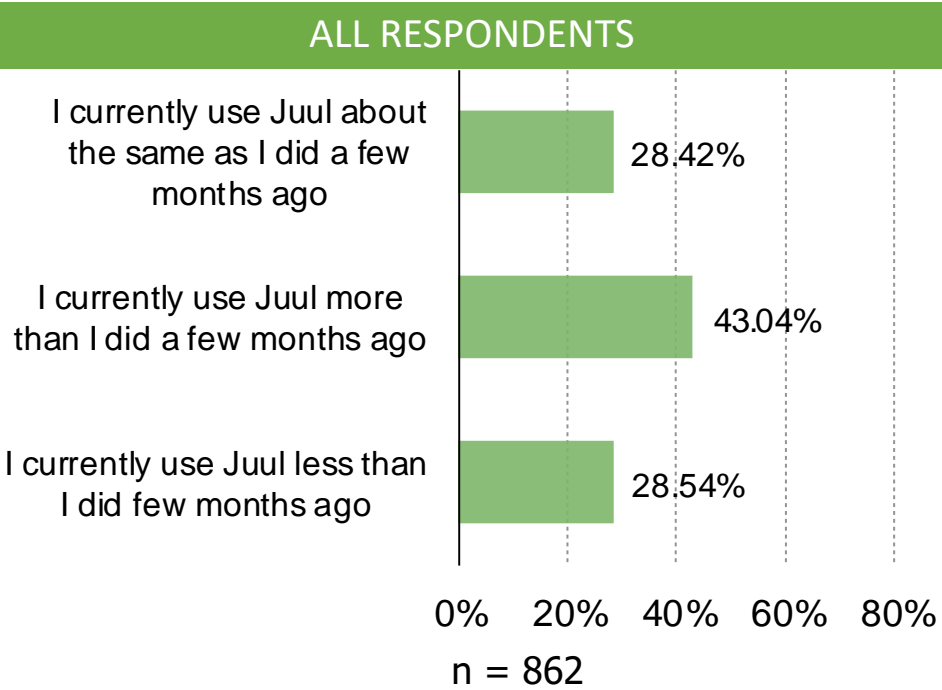


CROSS-TAB: AGE



Over the last several months, how has your Juul usage changed?

Posed to the target audience (1000 respondents who bought Juul in the past year) who first purchased Juul **more than 3 months ago**.

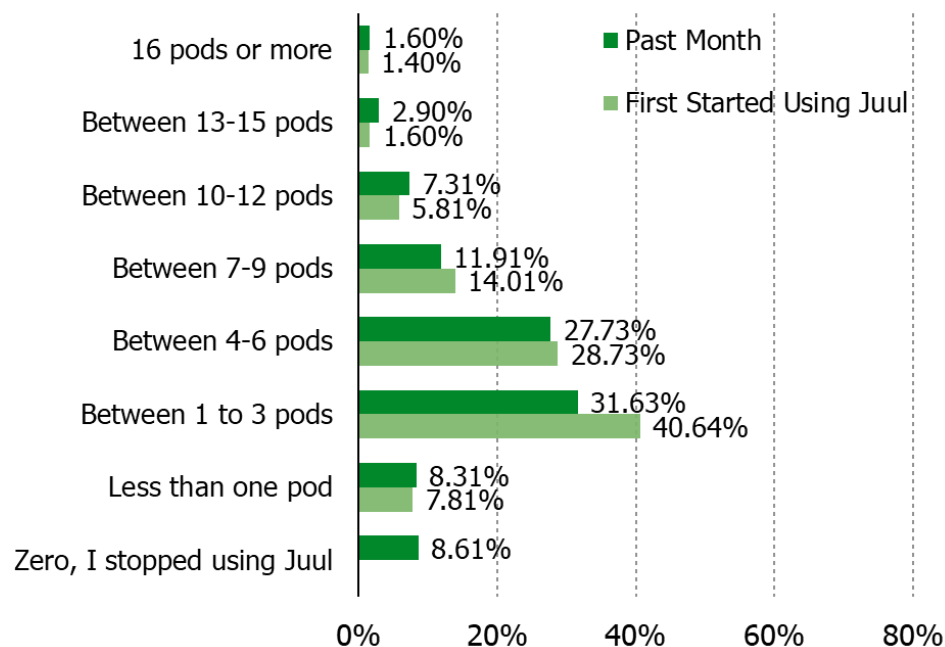


Juul Usage Questions

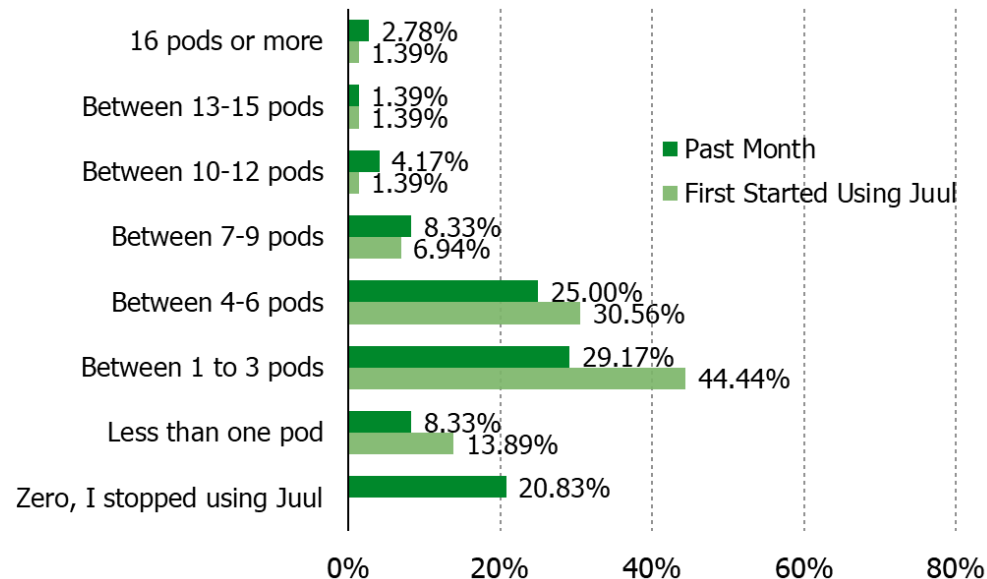
When you first started using Juul, how many pods did you consume per week vs. in the past month how many pods did you consumer per week?

Posed to the target audience (1000 respondents who bought Juul in the past year).

ALL RESPONDENTS

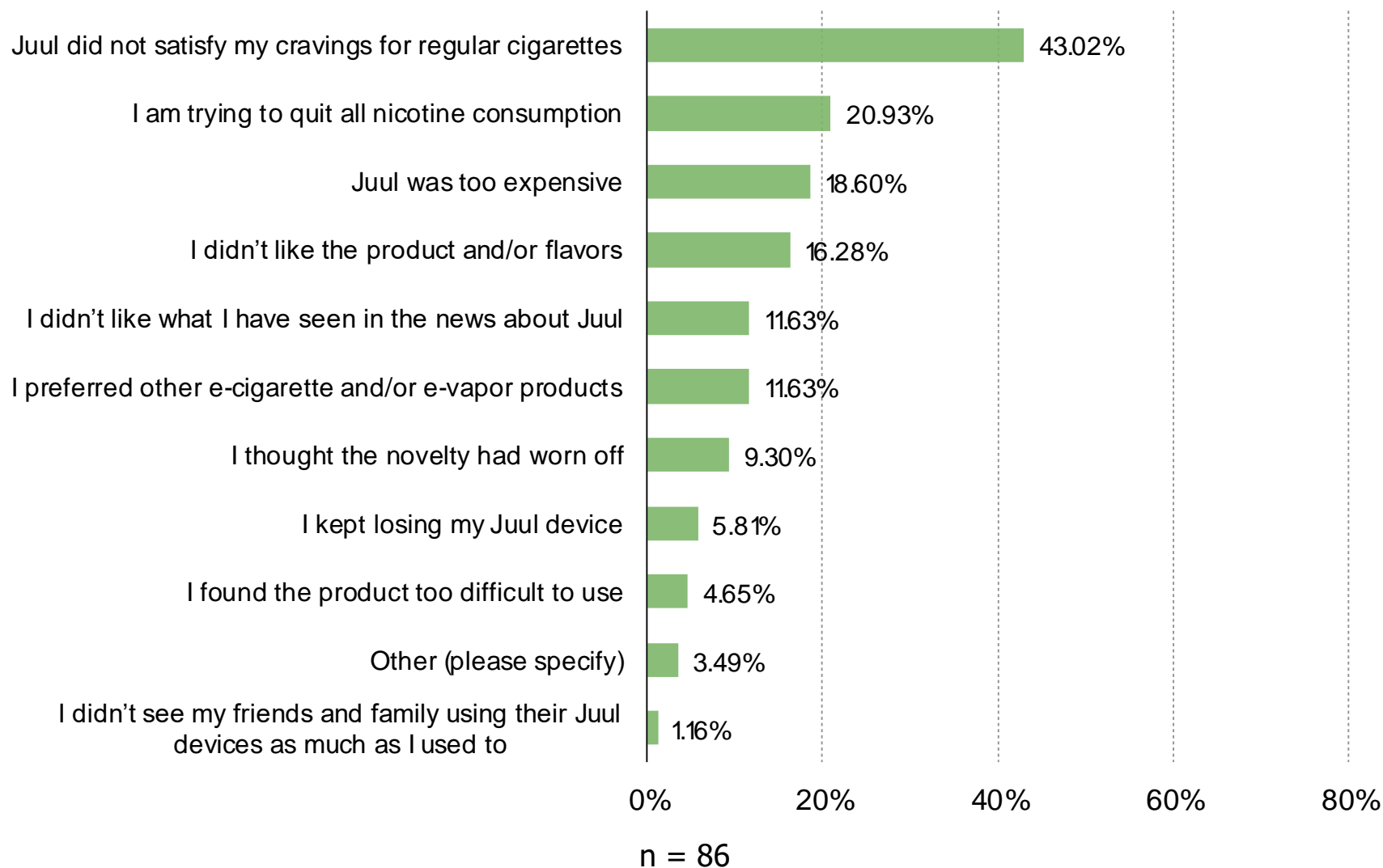


CROSS-TAB: AGE



Why did you quit using Juul? (Please select up to three)

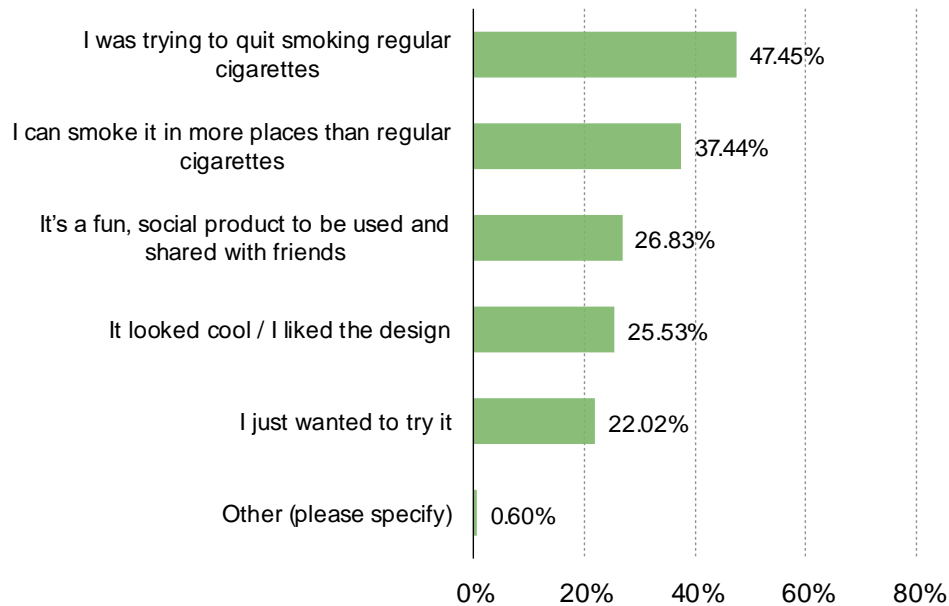
Posed to the target audience (1000 respondents who bought Juul in the past year) who no longer use Juul.



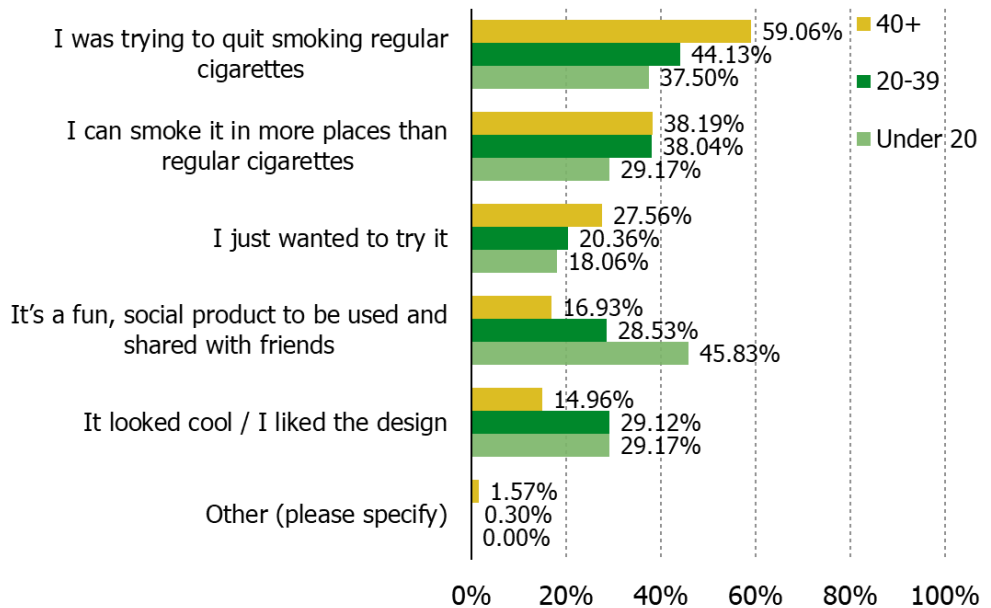
Why did you first decide to start using Juul? Please select the best answer:

Posed to the target audience (1000 respondents who bought Juul in the past year).

ALL RESPONDENTS

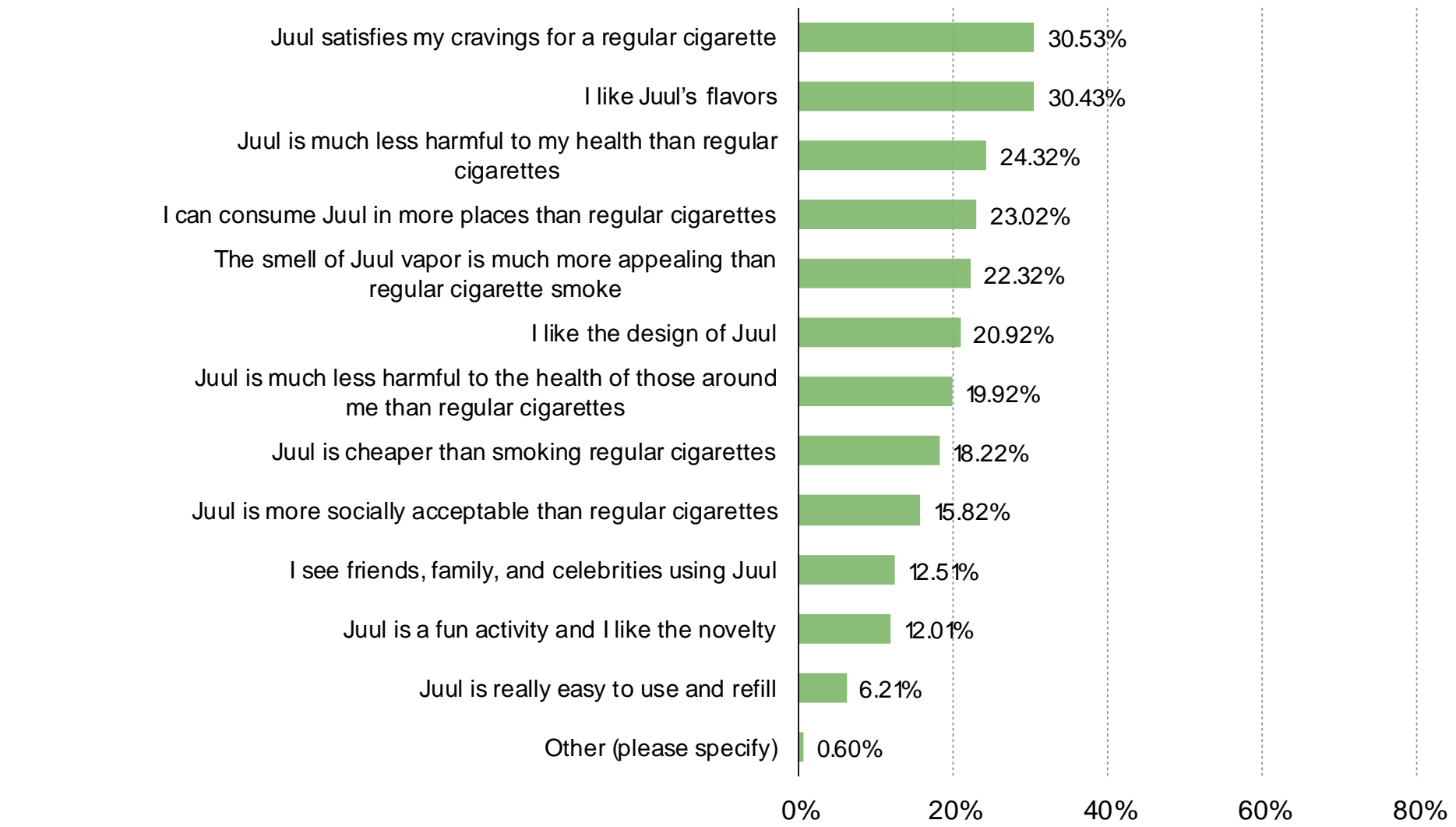


CROSS-TAB: AGE



What are the most appealing attributes of Juul? (Please select up to three)

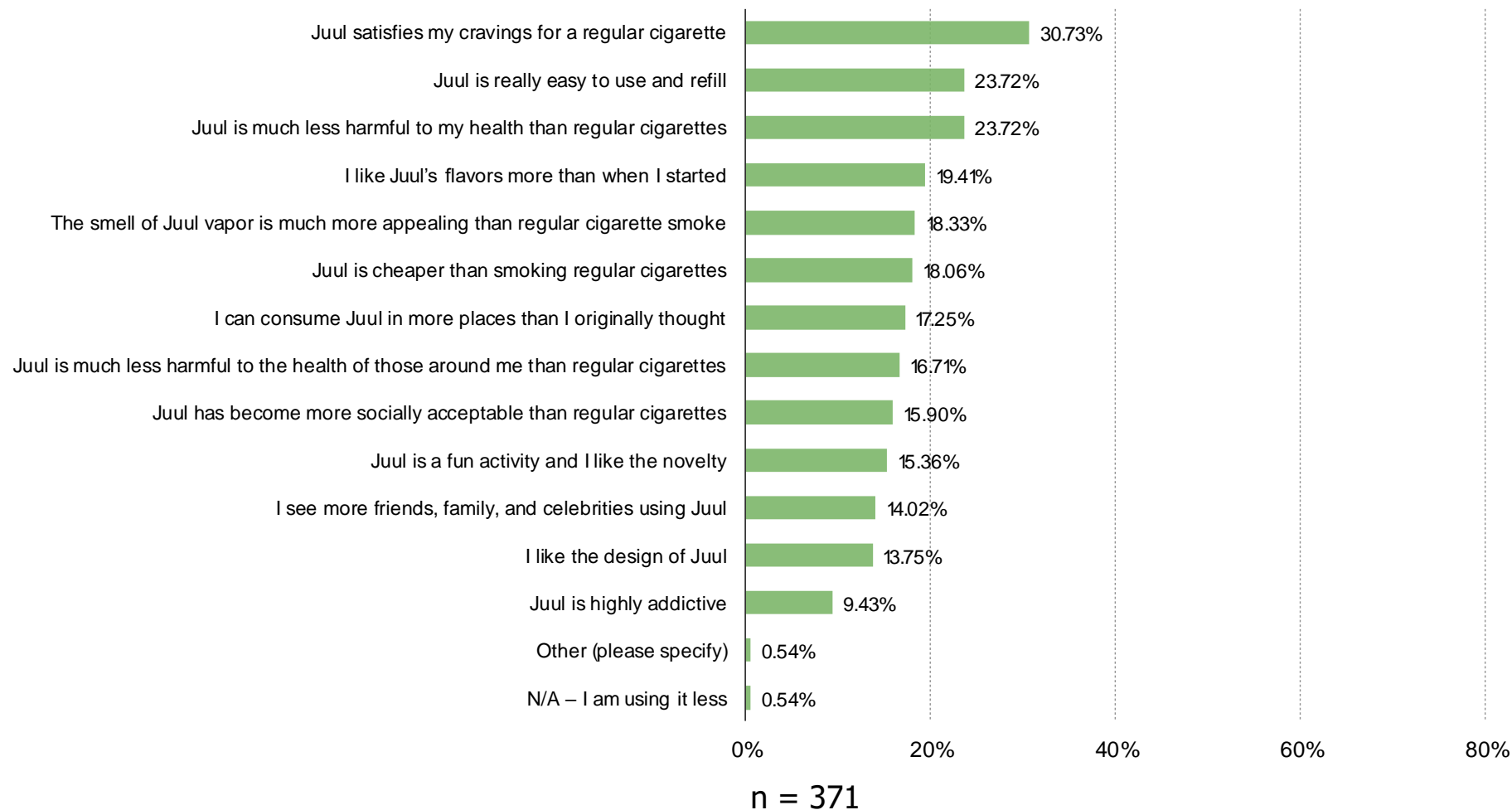
Posed to the target audience (1000 respondents who bought Juul in the past year).



Juul Usage Questions

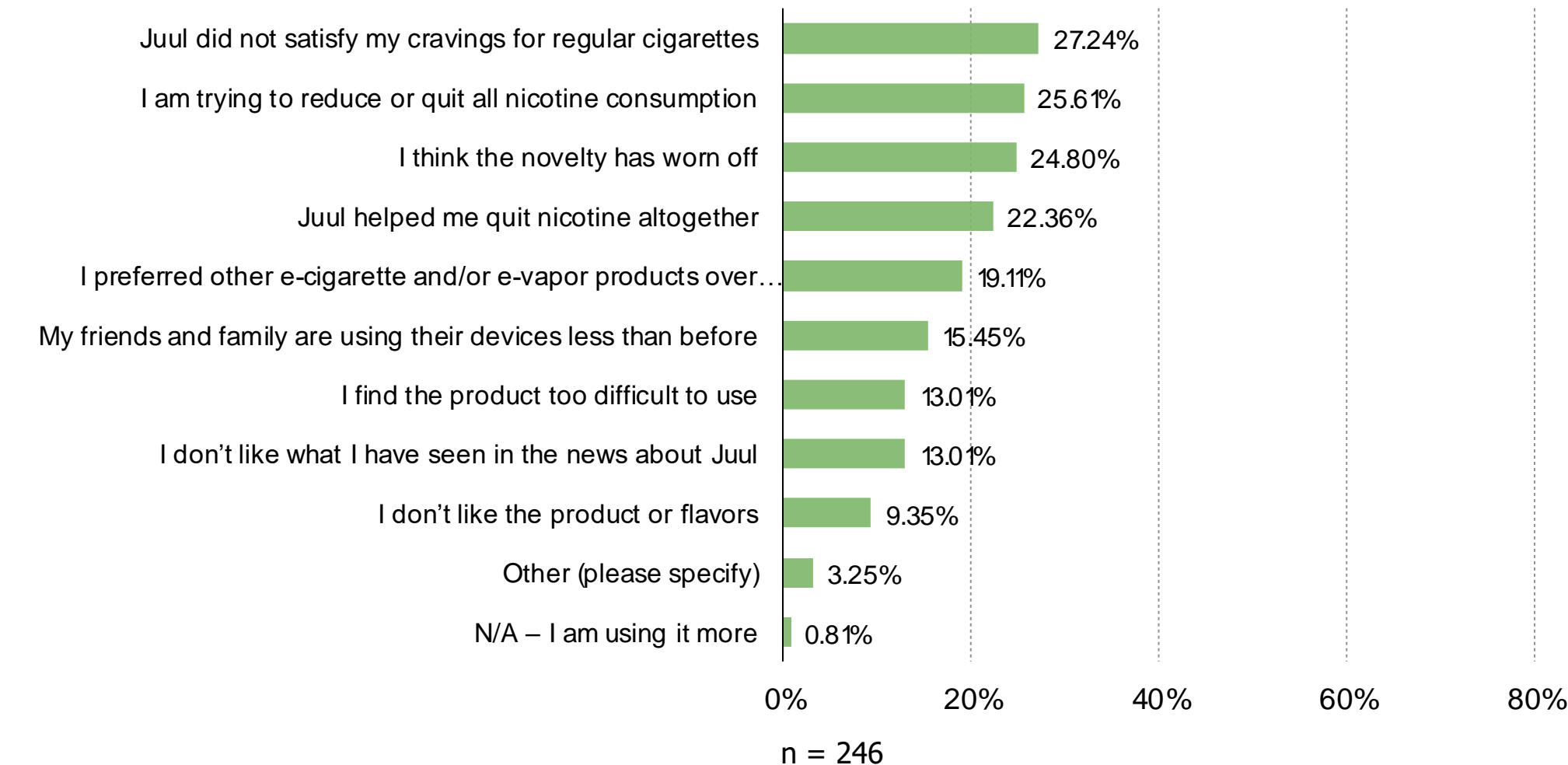
Please describe why you think you are consuming more Juul pods today than a few months ago. (Please select up to three)

Posed to the target audience (1000 respondents who bought Juul in the past year) who are using **more pods compared to a few months ago**.



Please describe why you think you are consuming less Juul pods today than a few months ago. (Please select up to three)

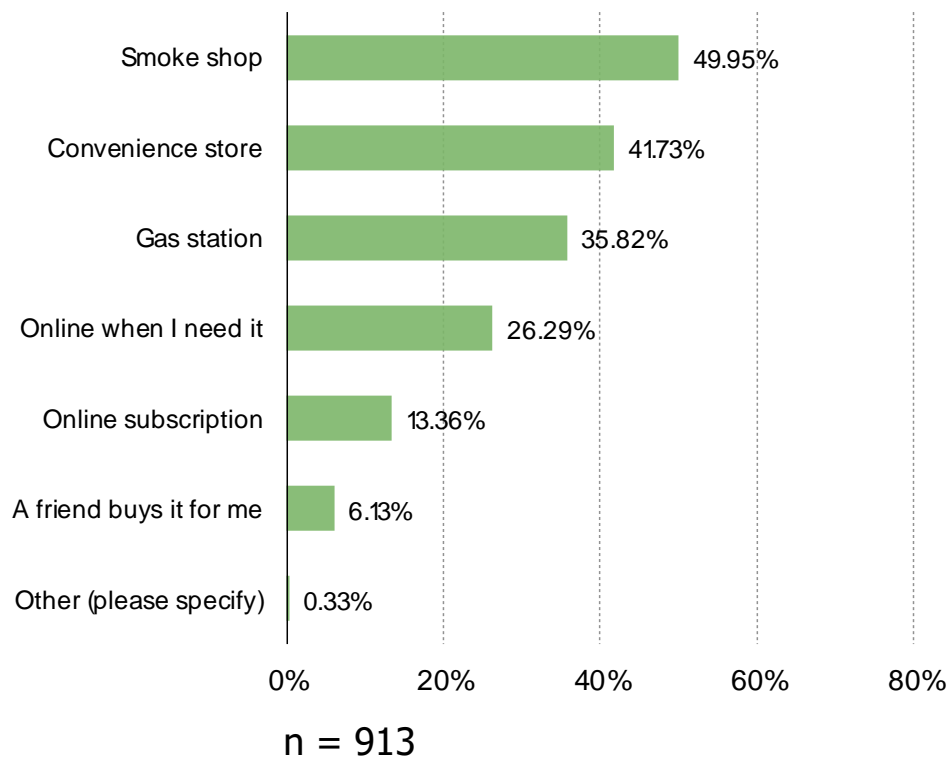
Posed to the target audience (1000 respondents who bought Juul in the past year) who are using **less pods compared to a few months ago**.



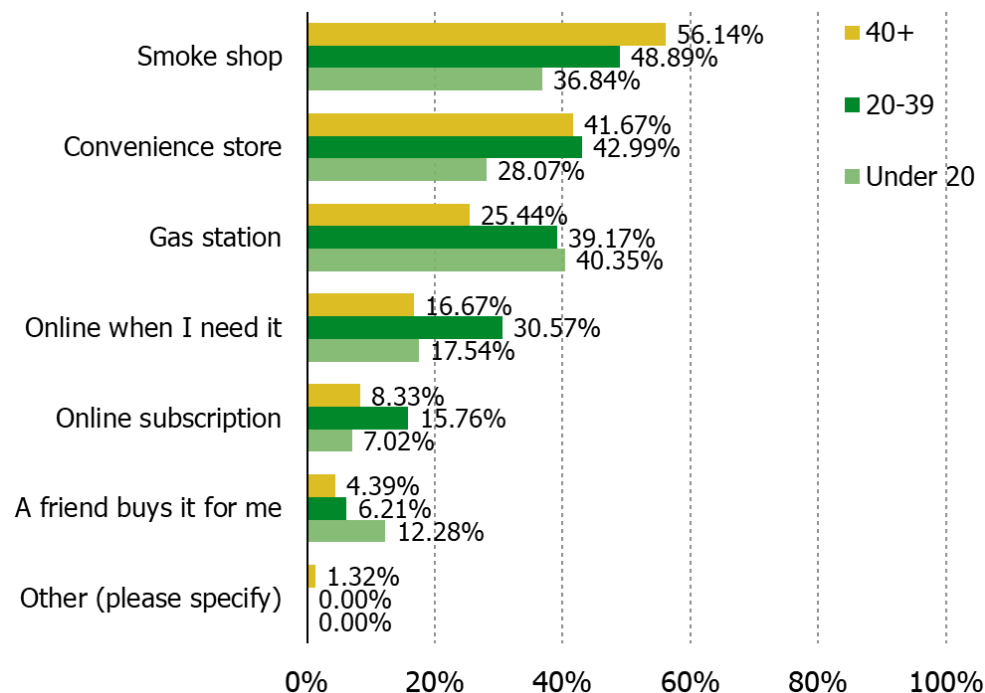
How do you usually purchase your Juul pods? (Select all that apply)

Posed to the target audience (1000 respondents who bought Juul in the past year) who consume **less than one Juul pod per week or more.**

ALL RESPONDENTS



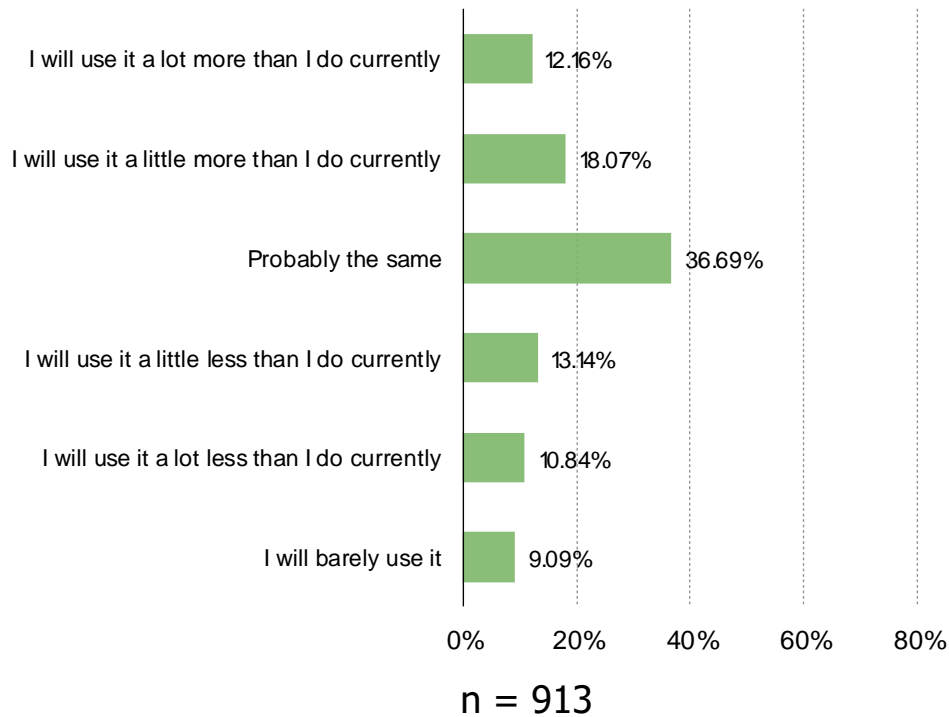
CROSS-TAB: AGE



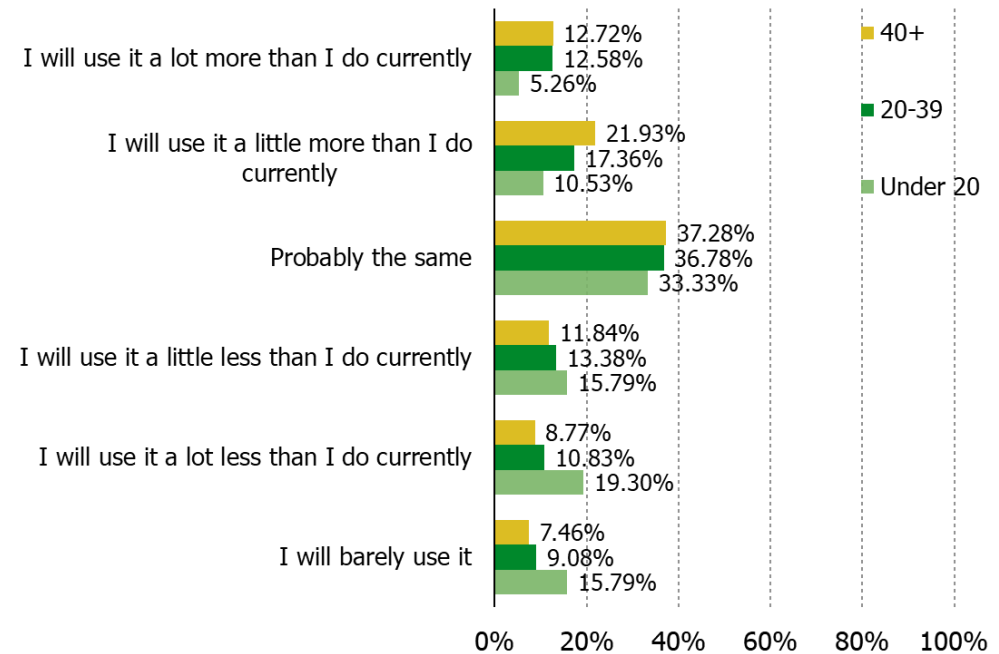
Do you think you will be using Juul as frequently in 2019 as you are currently?

Posed to the target audience (1000 respondents who bought Juul in the past year) who consume **less than one Juul pod per week or more.**

ALL RESPONDENTS

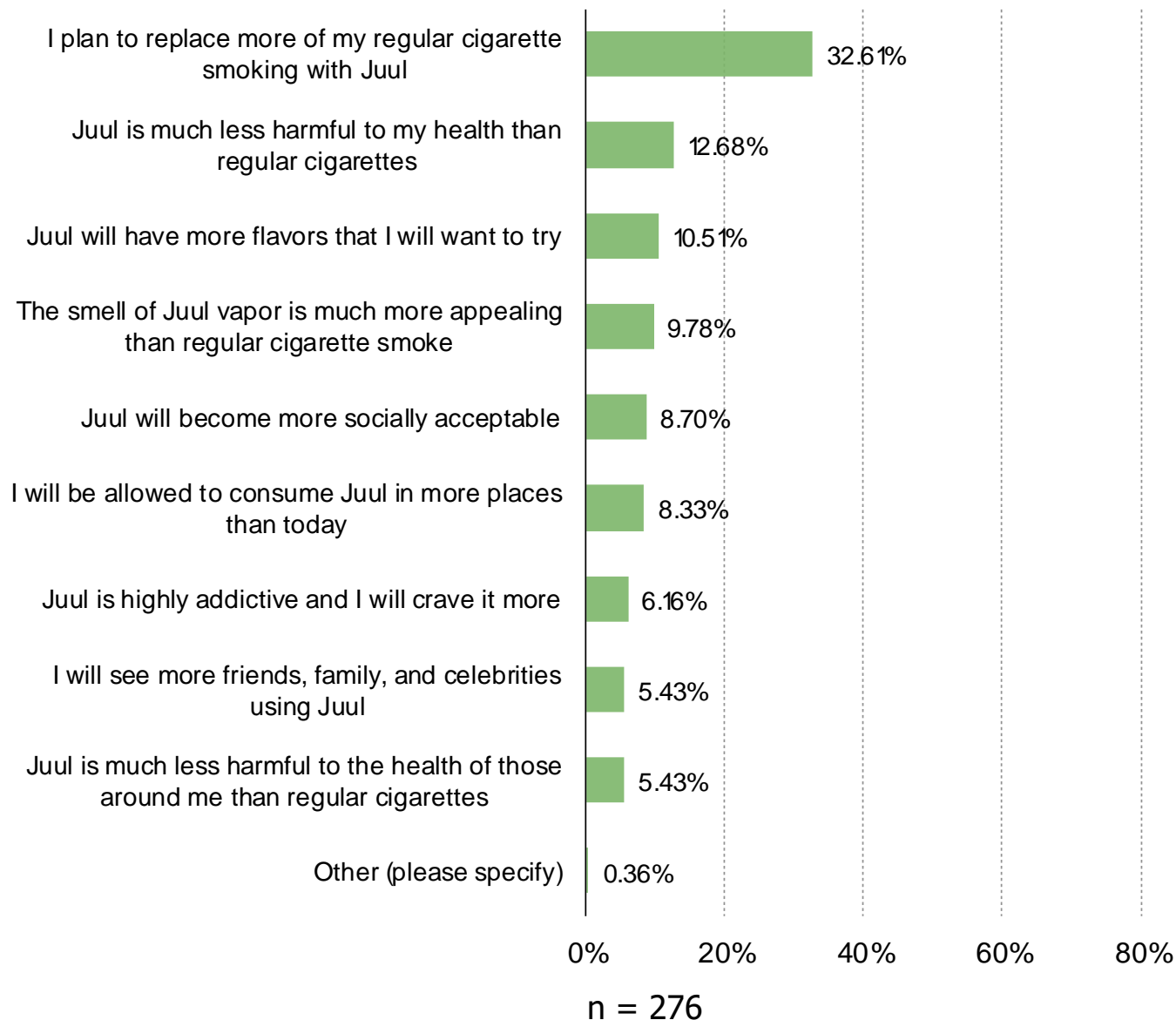


CROSS-TAB: AGE



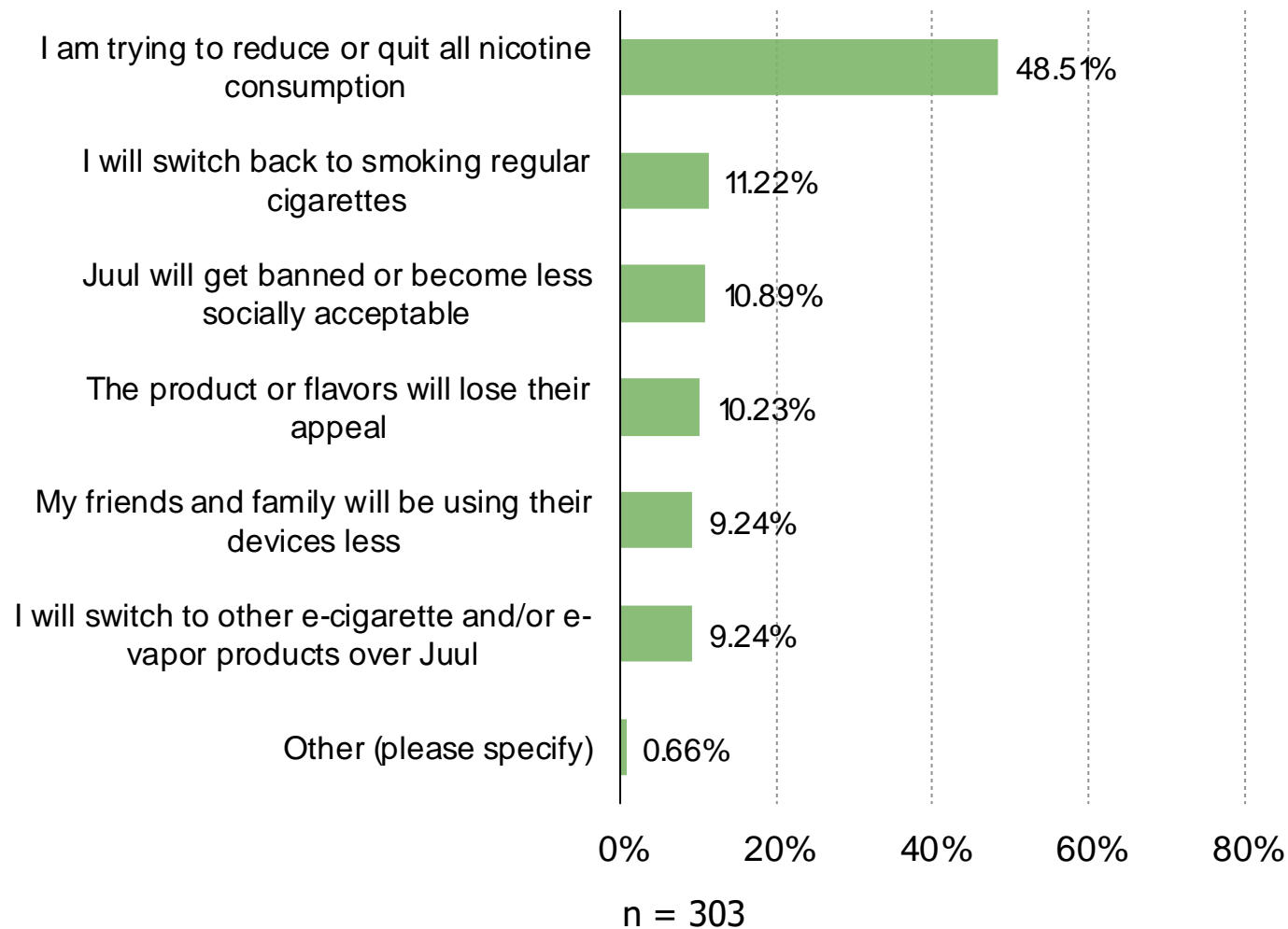
Why do you think you will consume Juul more in 2019 vs. today?

Posed to the target audience (1000 respondents who bought Juul in the past year) who consume less than one Juul pod per week or more who think they will consume Juul **more in 2019**.



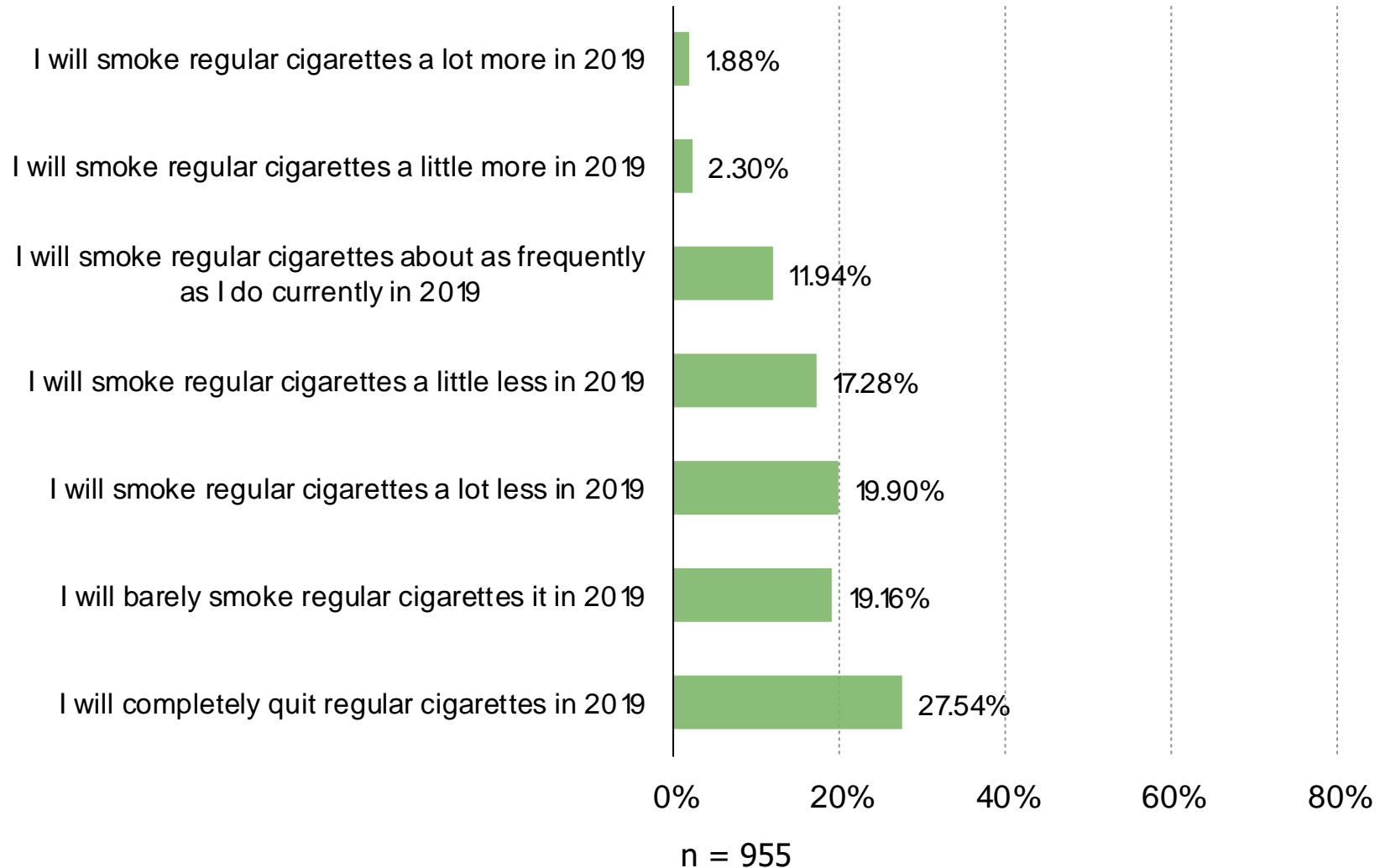
Why do you think you will consume Juul less in 2019 vs. today?

Posed to the target audience (1000 respondents who bought Juul in the past year) who consume less than one Juul pod per week or more who think they will consume Juul **less in 2019**.



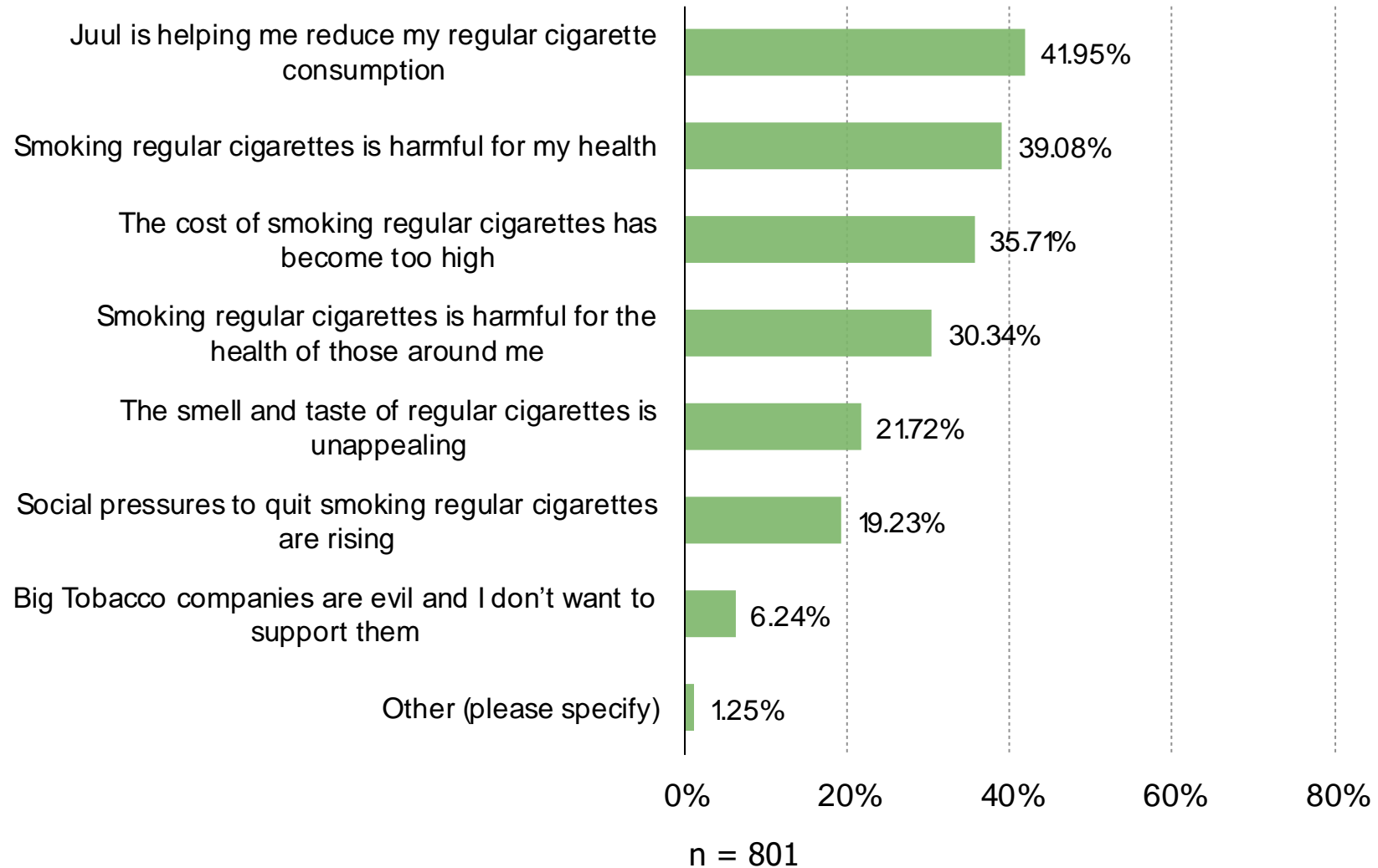
Do you think you will be smoking regular cigarettes as frequently in 2019 as you are currently?

Posed to the target audience (1000 respondents who bought Juul in the past year) who still smoke regular cigarettes.



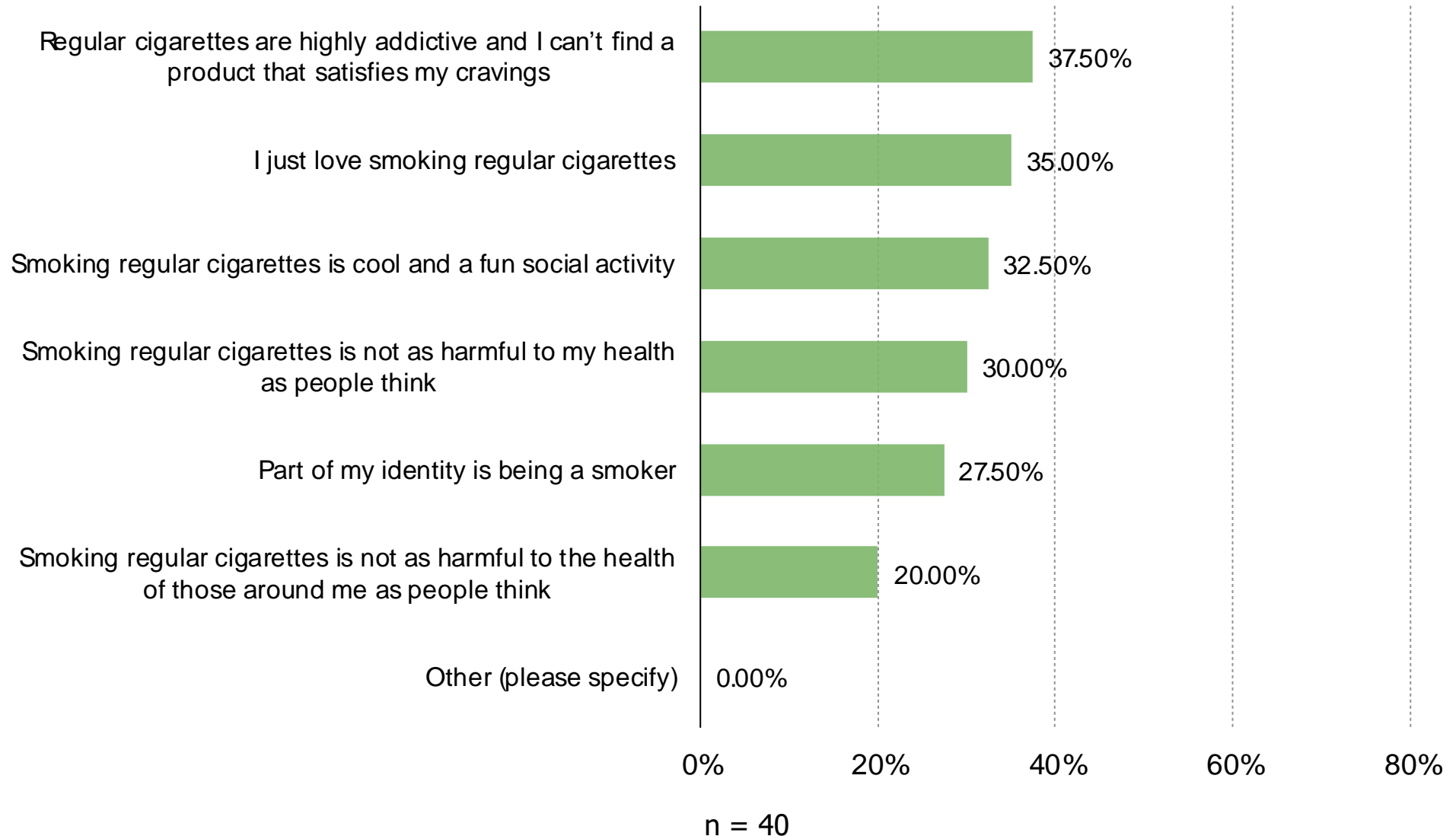
Why do you think you will smoke fewer regular cigarettes in 2019 vs. today? (Please select up to three)

Posed to the target audience (1000 respondents who bought Juul in the past year) who still smoke regular cigarettes who believe they will smoke **fewer regular cigarettes in 2019**.



Why do you think you will smoke more regular cigarettes in 2019 vs. today? (Please select up to three)

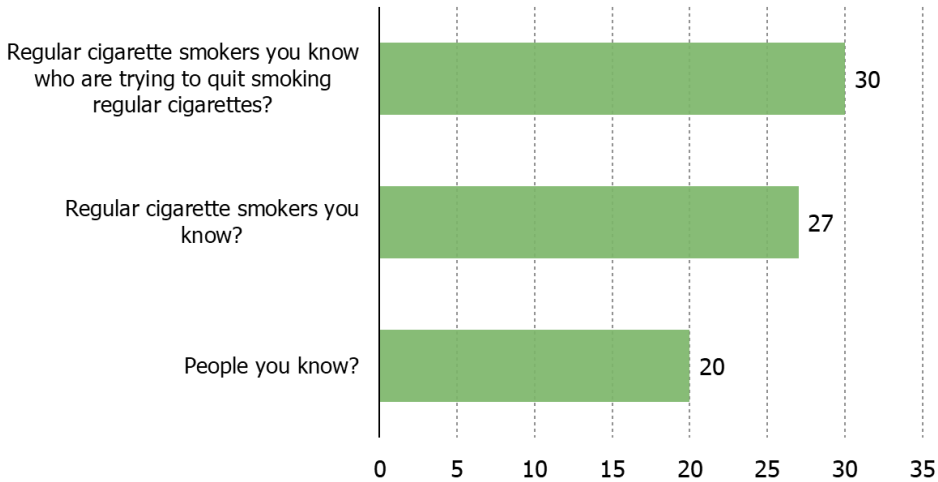
Posed to the target audience (1000 respondents who bought Juul in the past year) who still smoke regular cigarettes who believe they will smoke **more regular cigarettes in 2019**.



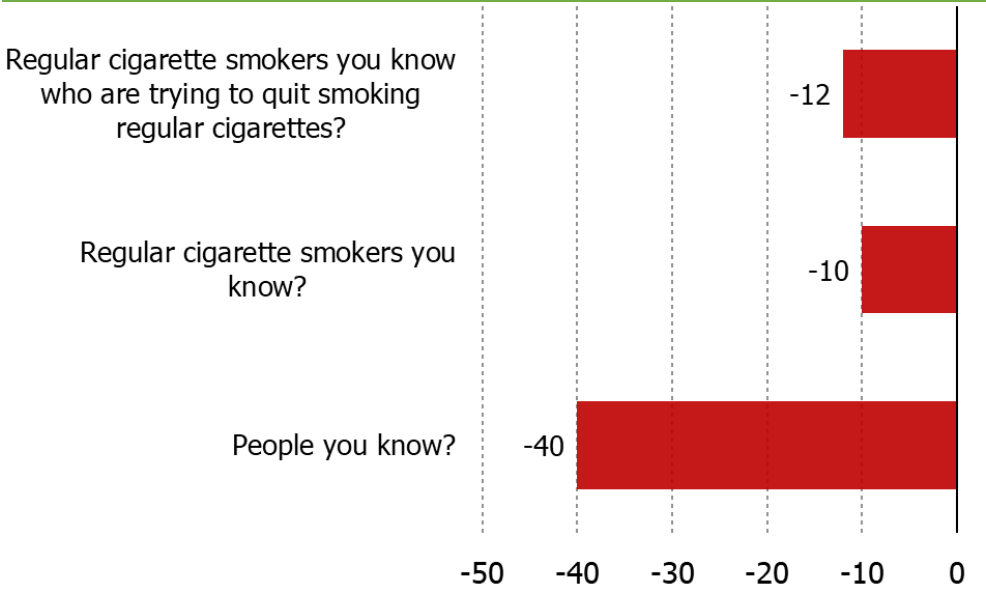
On a scale of 1-10 (with 1 being “least likely”, and 10 being “most likely”), how likely are you to recommend Juul to (Net Promoter Score Below):

Posed to the target audience (1000 respondents who bought Juul in the past year).

ALL RESPONDENTS

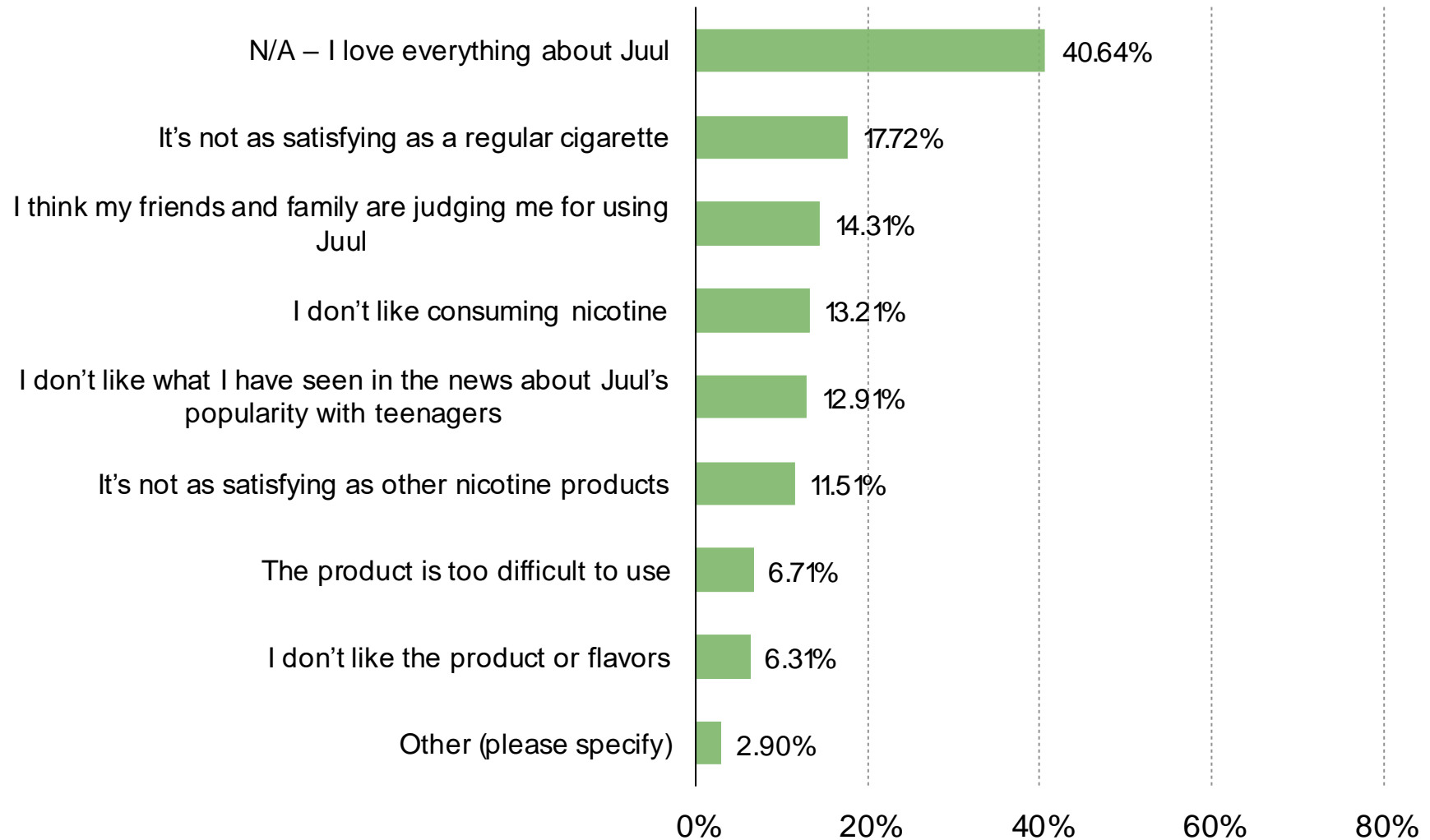


UNDER 20



Why do you NOT like Juul? (Please select up to two)

Posed to the target audience (1000 respondents who bought Juul in the past year).

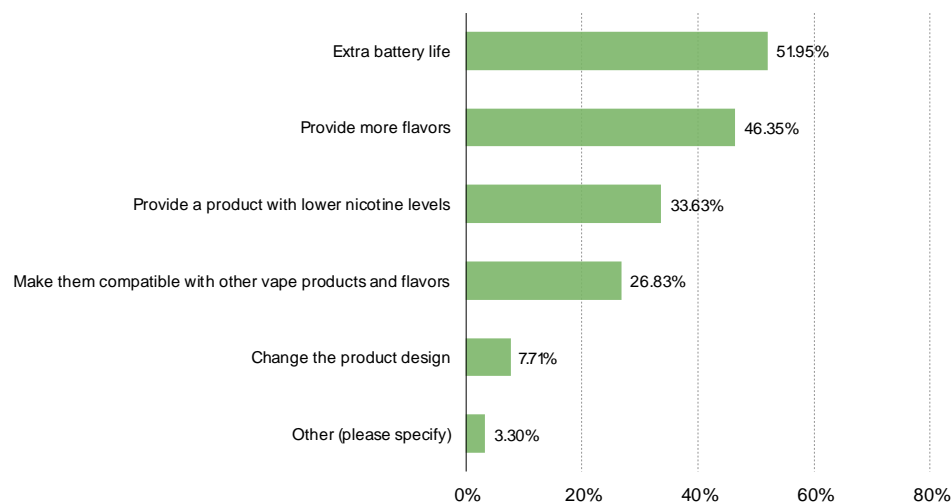


Juul Usage Questions

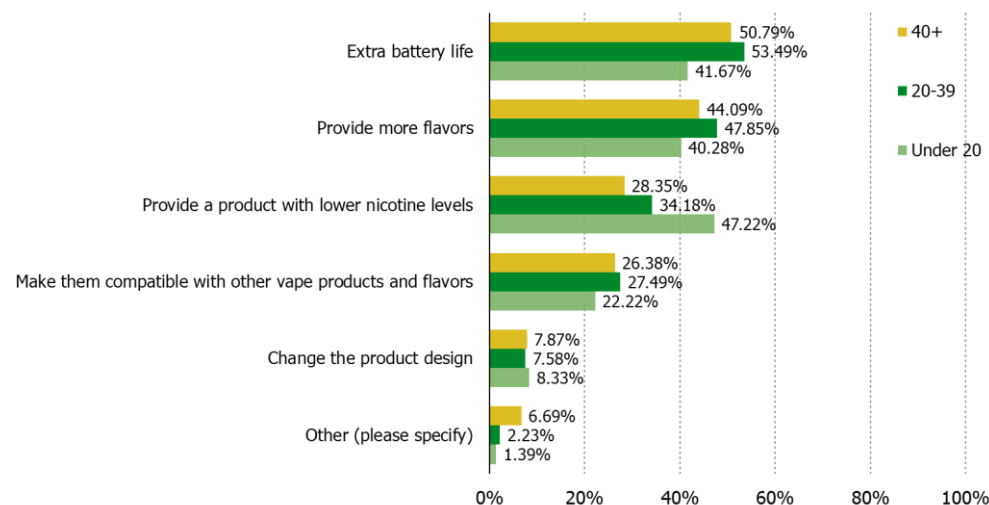
What can Juul do to improve their product? (Please select up to three)

Posed to the target audience (1000 respondents who bought Juul in the past year).

ALL RESPONDENTS



UNDER 20



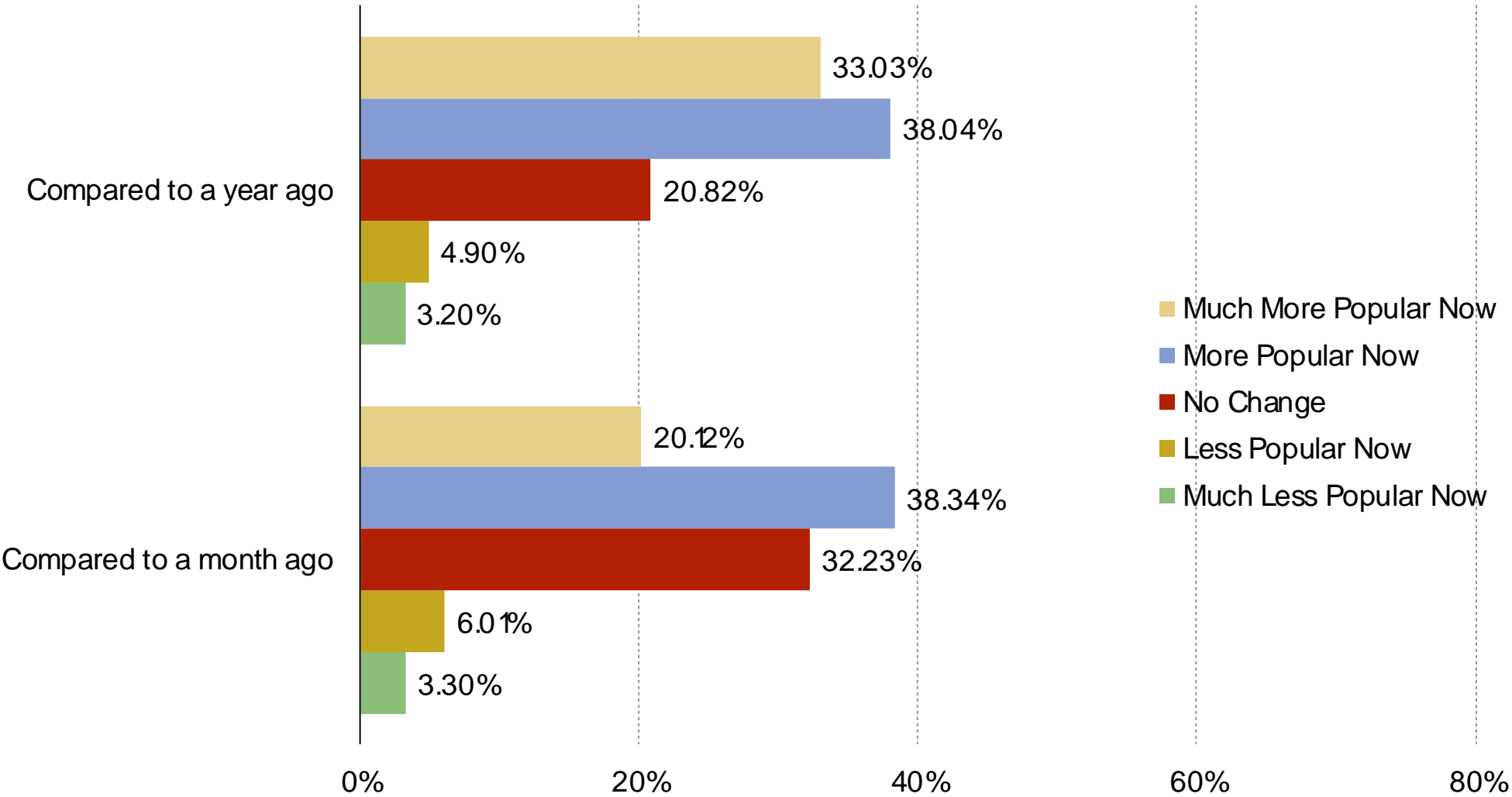
Posed to the target audience (1000 respondents who bought Juul in the past year) who think changing the product design will improve Juul.



$n = 77$

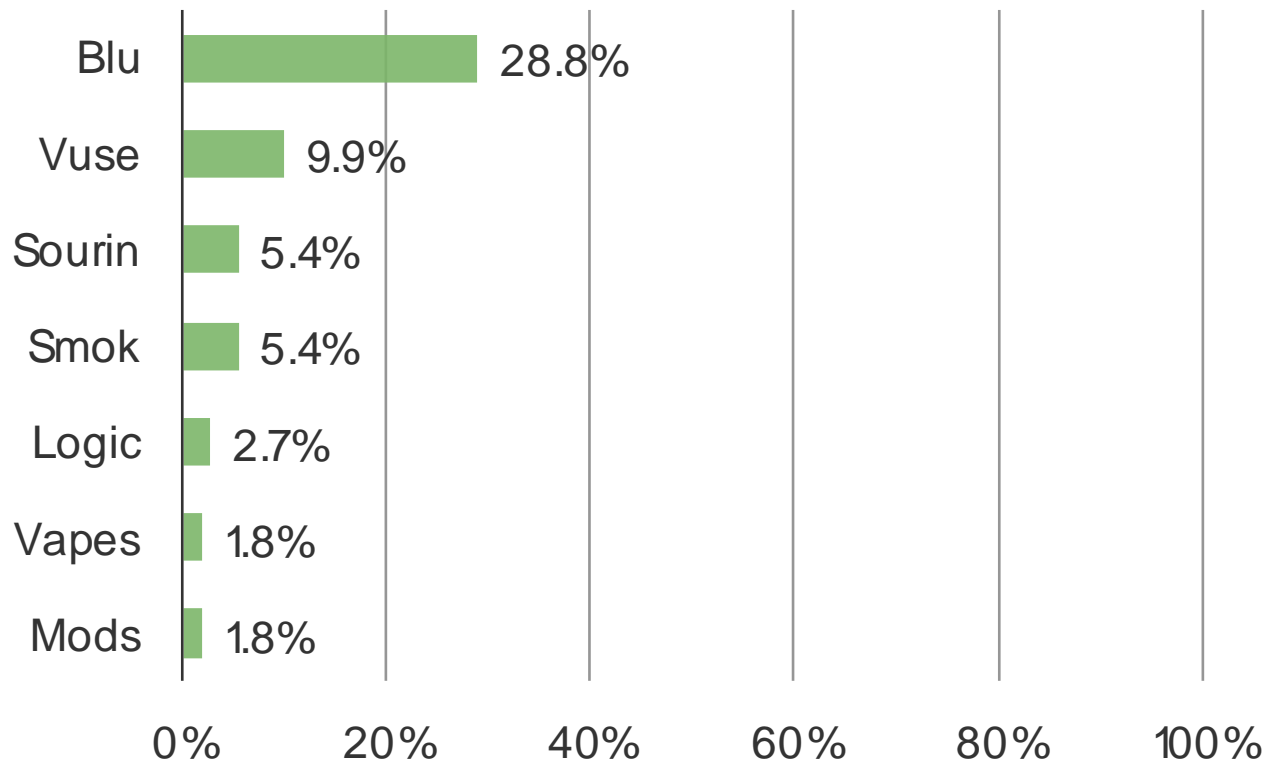
Do you think Juul has gotten more or less popular?

Posed to the target audience (1000 respondents who bought Juul in the past year).



Not including Juul, are there any new e-cigarette brands or products that you think are gaining popularity? (Fill-In)

Posed to the target audience (1000 respondents who bought Juul in the past year).



Posed to respondents who have tried Juul.

[illegible]