

# Background to the research

The Consumer Choice Center commissioned independent global research company Kantar, the world's leading data, insights and consulting company, to independently verify the questionnaire design and carry out the research. The Consumer Choice Center had no access to the research respondents or the generation of the results.

The survey was conducted via an internet omnibus survey, with quotas and weights on gender, age and region to ensure that the sample is representative of a total adult population 16-64 by country. The results are only reported on those 18+ to reflect the nature of the topics covered.

Kantar interviewed 8,166 adults (18+) online between 7-11 March and 14-18 March 2019. This was split between four markets:

**KANTAR**

The UK (2056)



Germany (2068)



USA (2056)



Canada (1986)

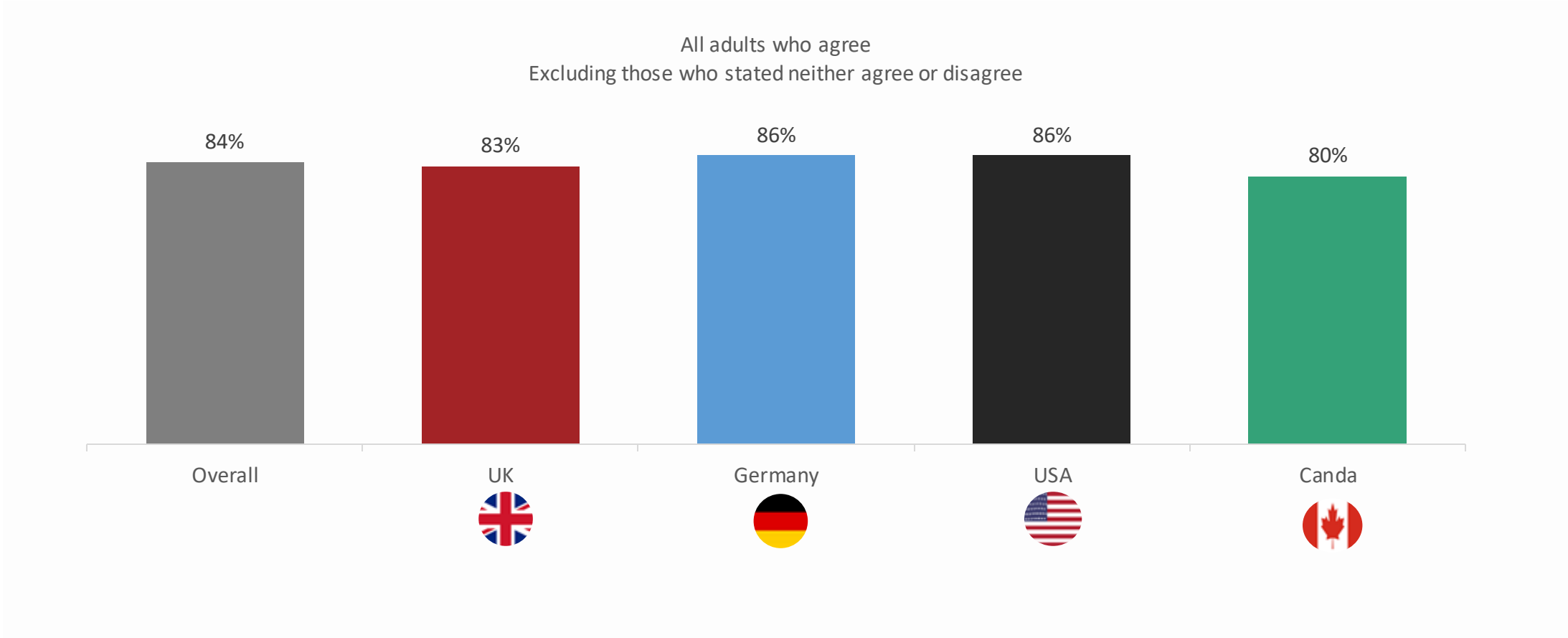


# Overall Findings

---

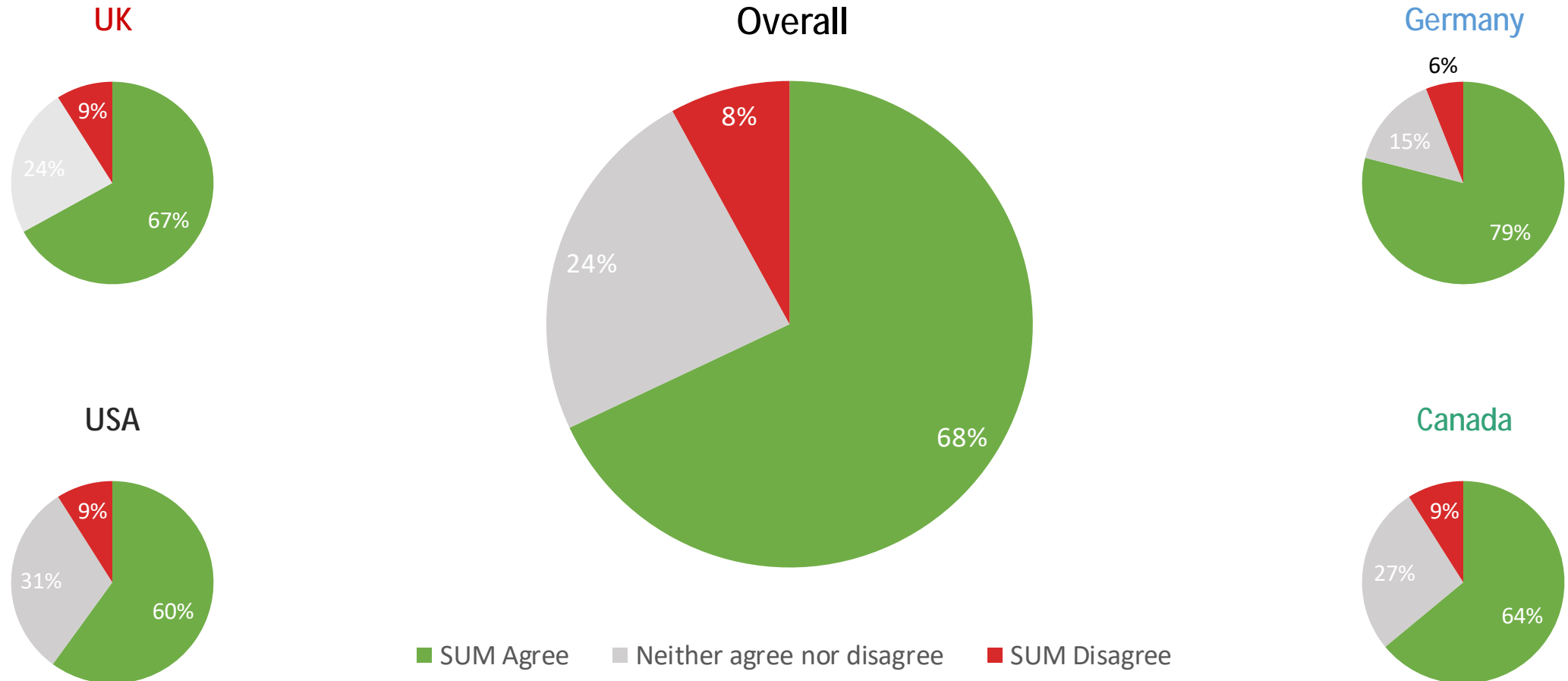
# A substantial majority in all markets agree there should be minimal government intervention in the choices that adults make about buying legal products and services

To what extent do you agree or disagree with each of these statements about government policies? *There should be minimal government intervention in the choices that adults can make about buying products and services that are legal*



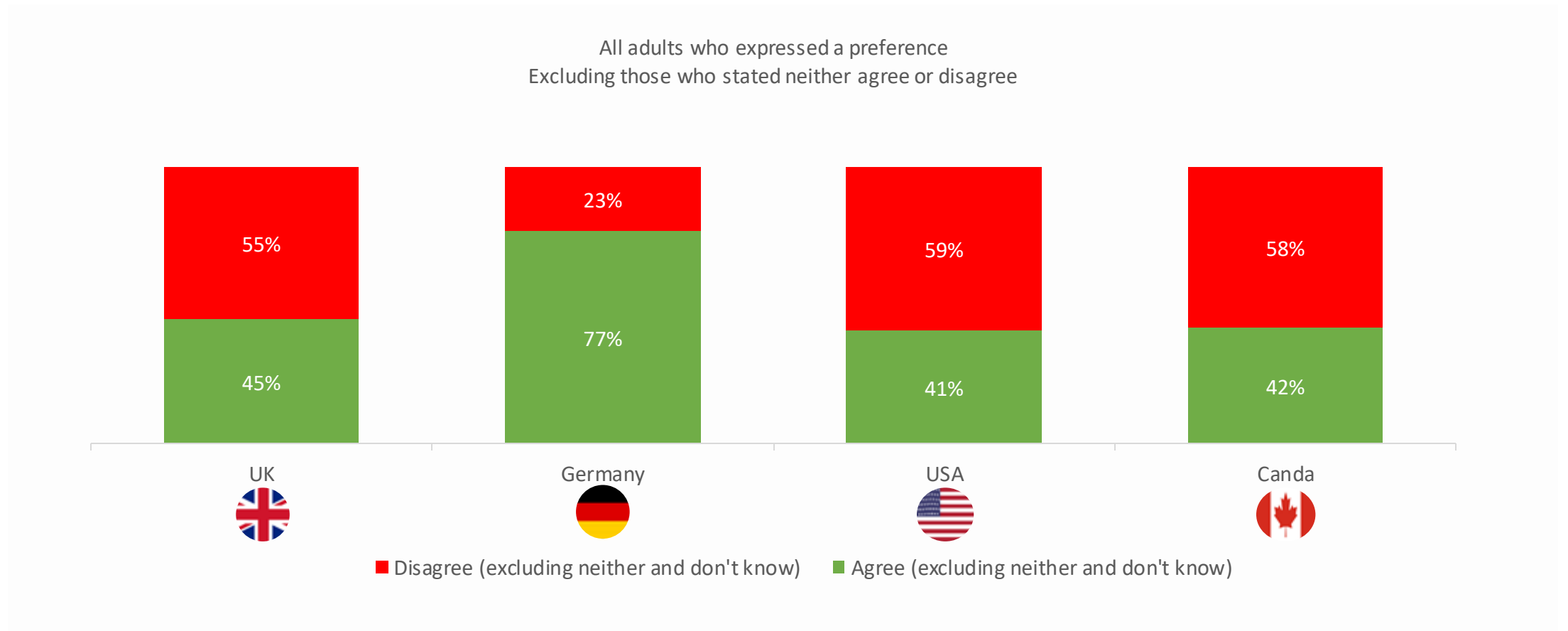
# Seven out of ten people agree that there is too much bureaucracy in society today

To what extent do you agree or disagree with each of these statements about government policies? *There is too much bureaucracy in society today*



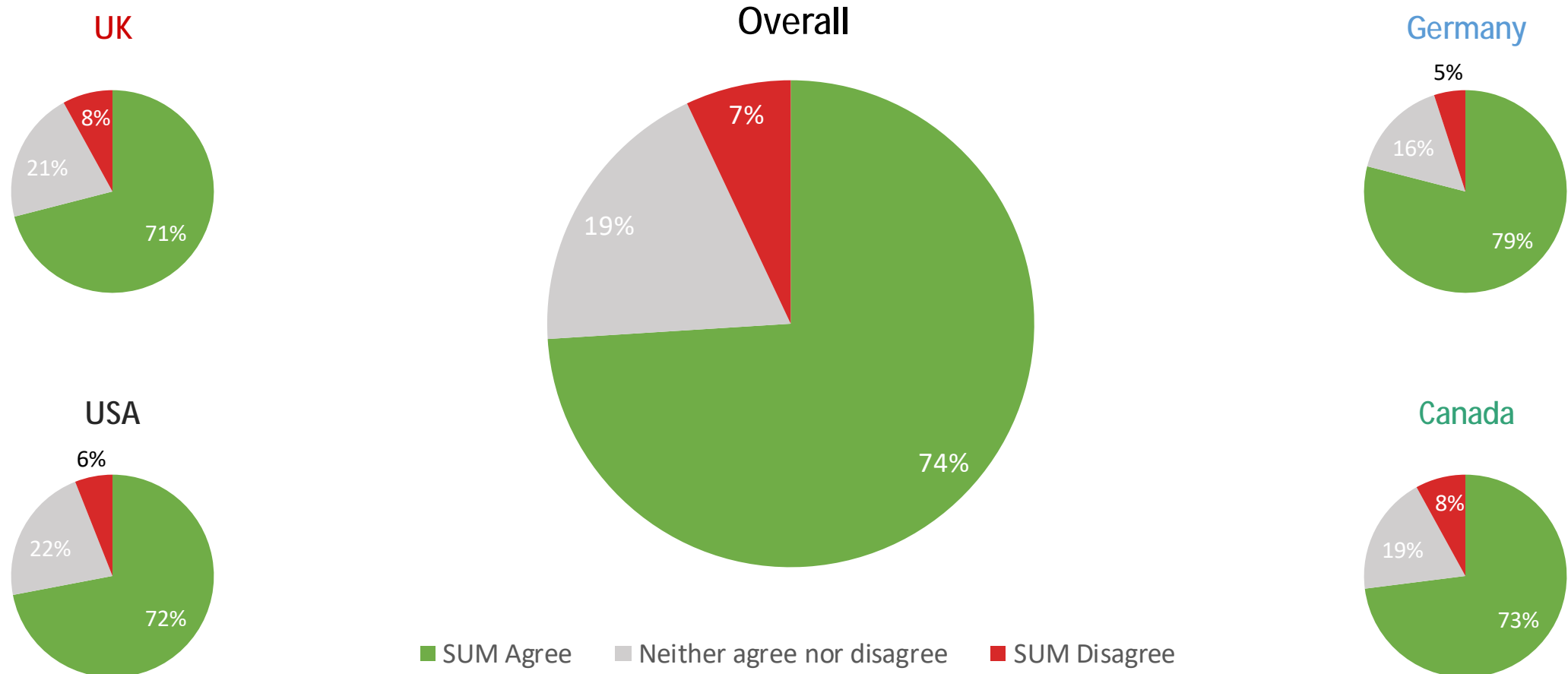
# Germany is the only country where people think that there's not enough regulation these days – all others disagree

To what extent do you agree or disagree with each of these statements about government policies? *In general, there's not enough regulation these days*



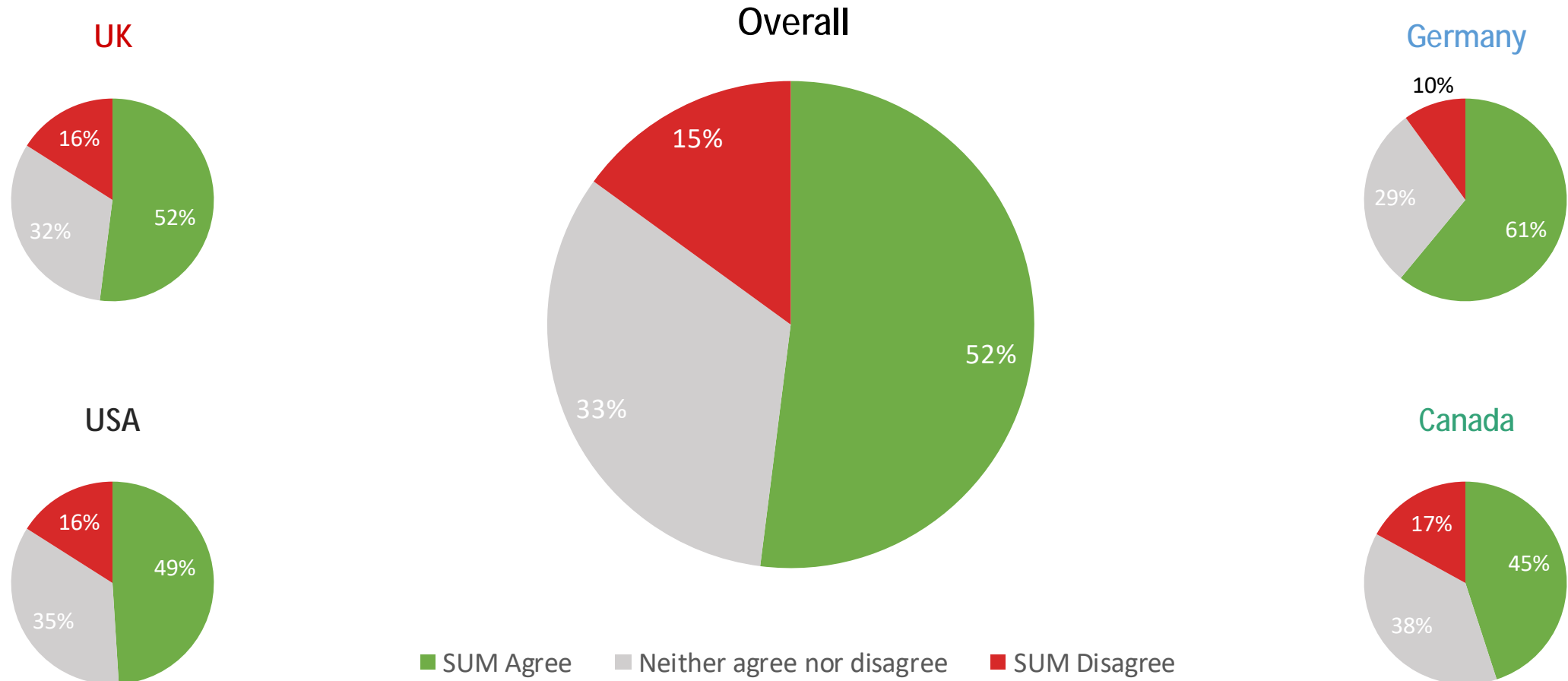
# Seven out of ten people believe that in a democracy the Government should protect freedom of choice for consumers

To what extent do you agree or disagree with each of these statements about government policies? *In a democracy, the Government should protect freedom of choice for consumers*



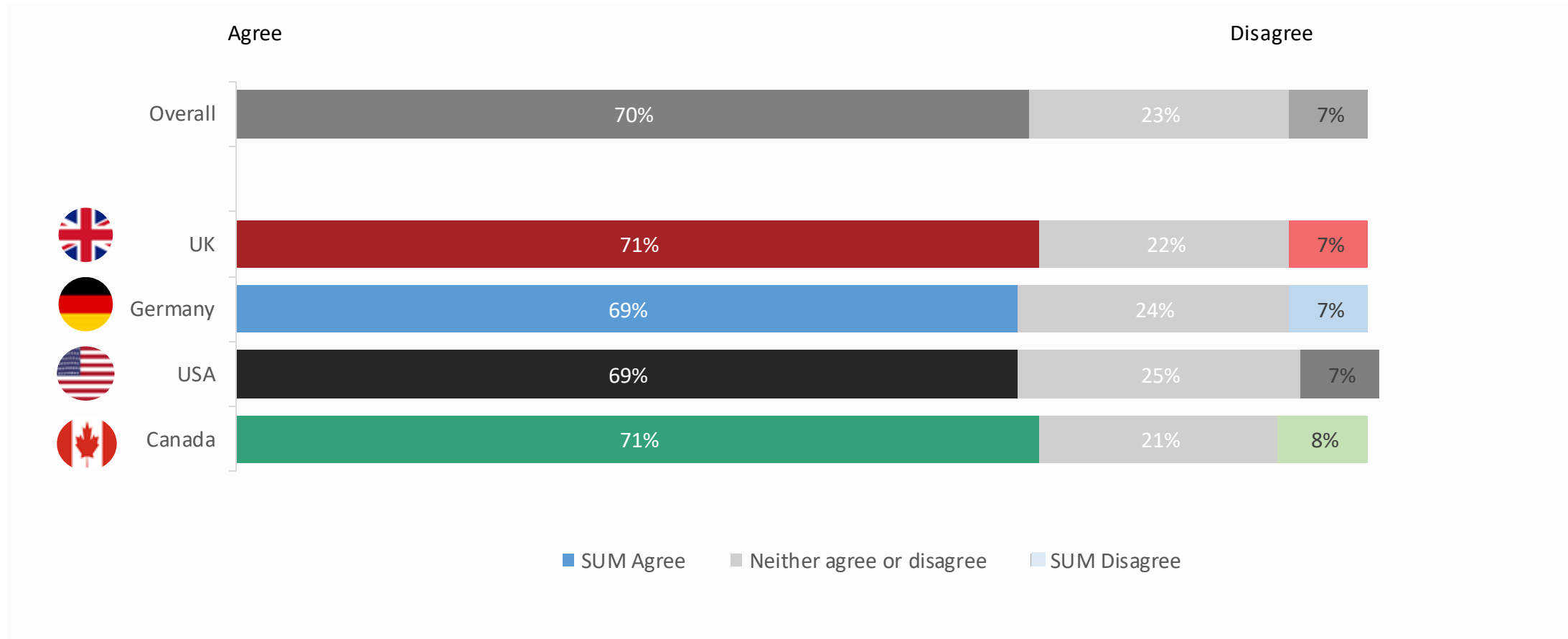
# Three times as many people agree than disagree that they are fed up with people interfering in their life

To what extent do you agree or disagree with each of these statements about government policies? *I am fed up with people interfering in my life*



# Ten times as many people agree than disagree that policy makers should take into account the views of consumers when deciding on the regulation of lifestyle choices

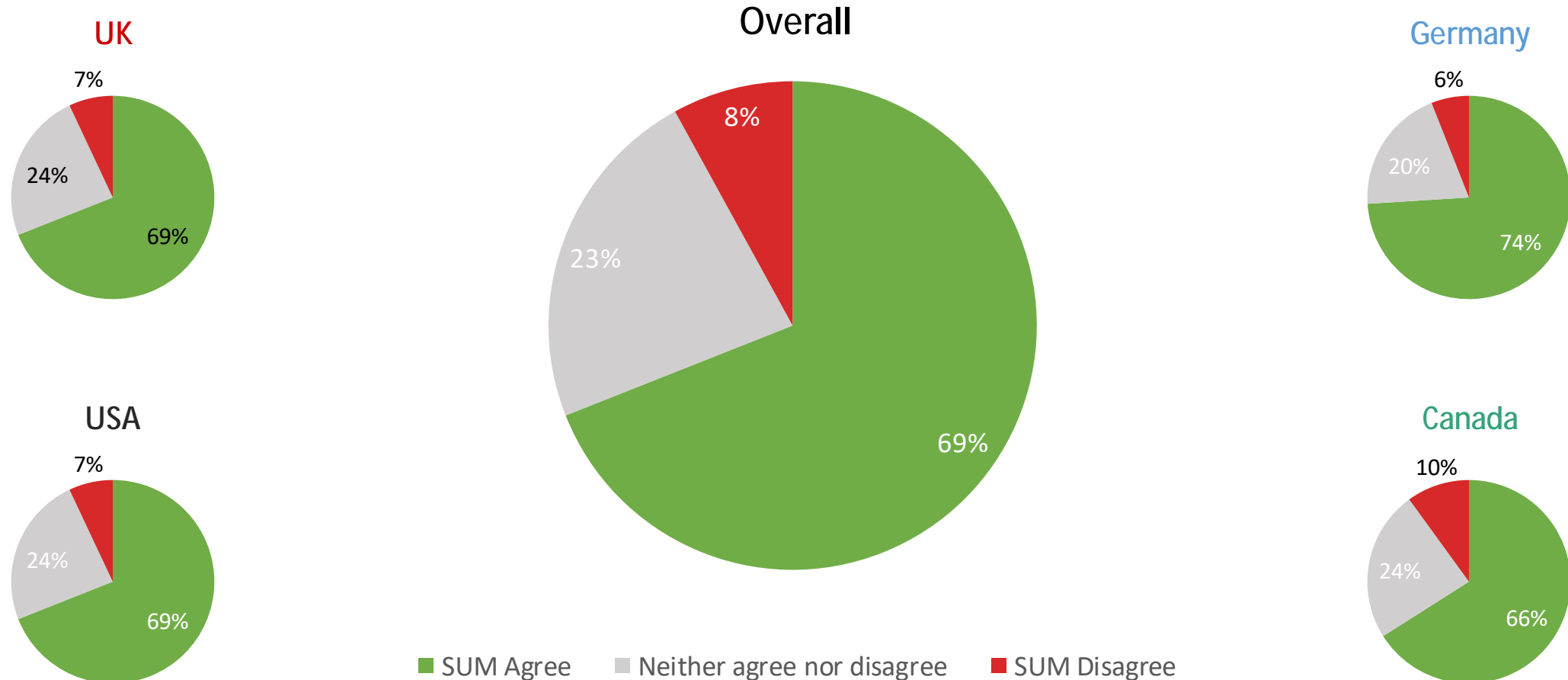
To what extent do you agree or disagree with each of these statements about government policies? *Policy makers should take into account the views of consumers when deciding on the regulation of lifestyle choices*





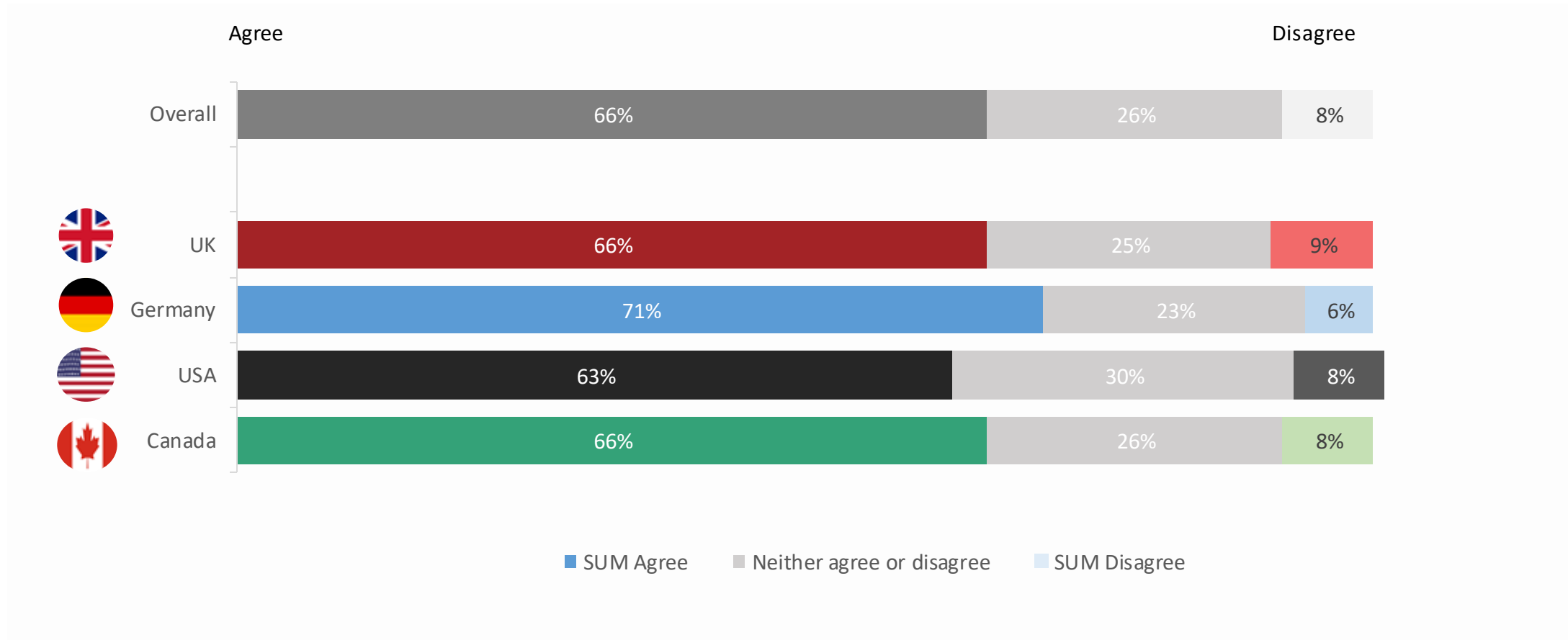
# Seven out of ten people think policy makers don't spend enough time listening to the views of consumers before proposing new regulations

To what extent do you agree or disagree with each of these statements about government policies? *Policy makers don't spend enough time listening to the views of consumers before proposing new regulations*



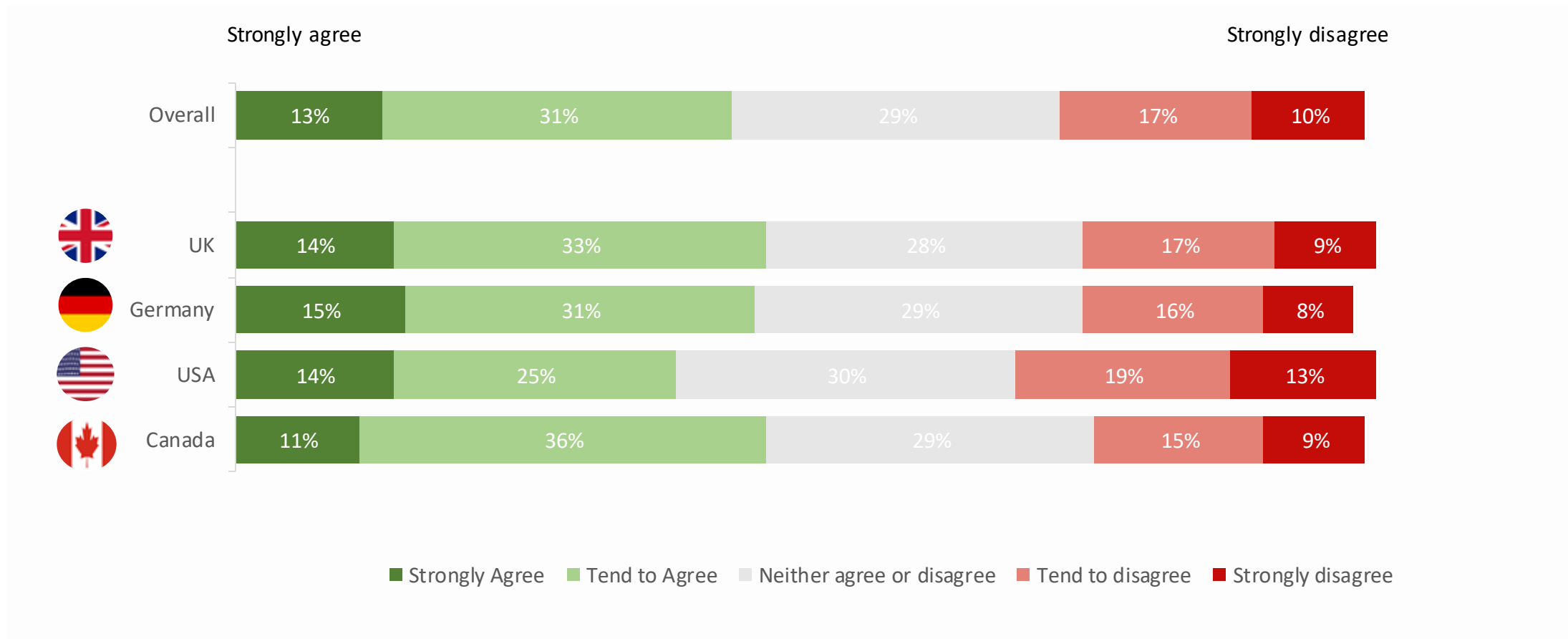
# Eight times as many people agree than disagree that policy makers should speak to consumer rights' groups before banning or restricting access to a product or service

To what extent do you agree or disagree with each of these statements about government policies? *Policy makers should speak to consumer rights' groups before banning or restricting access to a product or service*



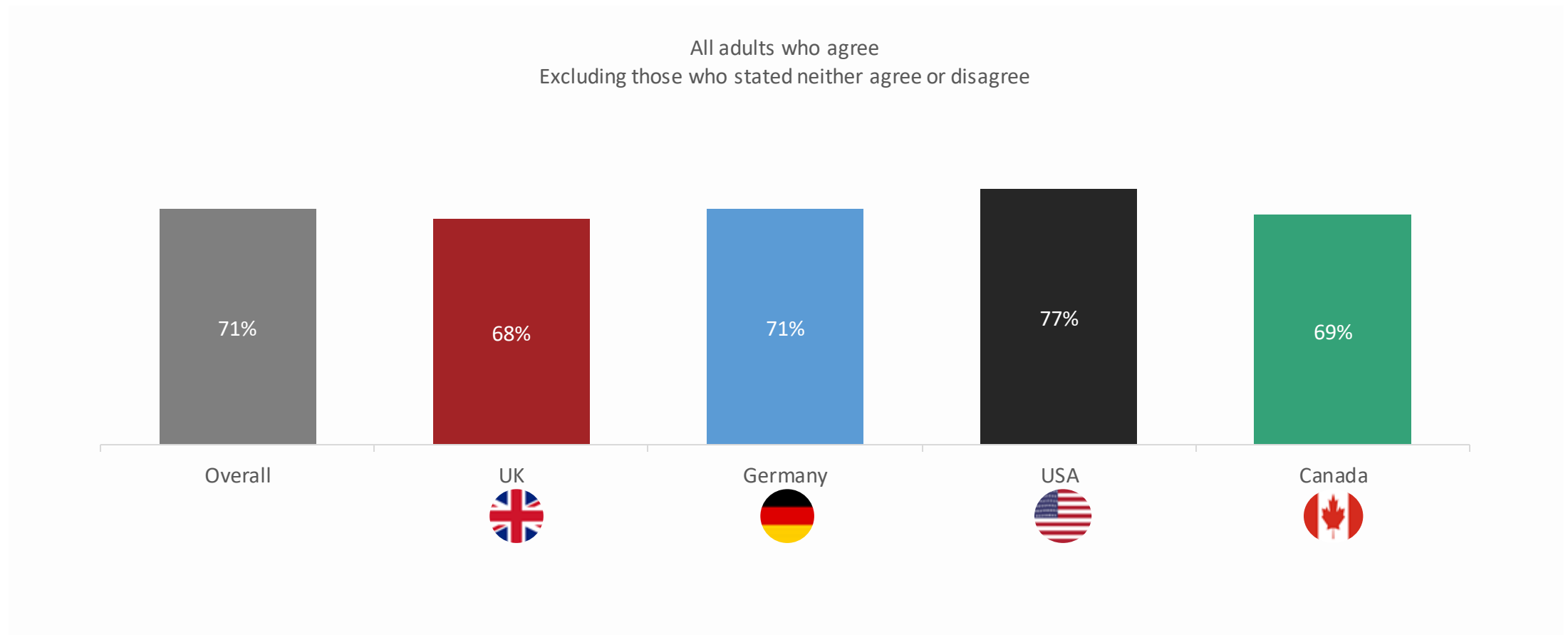
# Overall around half of respondents agree that if there is sufficient evidence that a policy is for the greater good of society, it is acceptable for the Government to introduce regulation that limits their personal choice as an adult

To what extent do you agree or disagree with each of these statements about government policies? *It's acceptable for the Government to introduce regulation that limits my personal choice as an adult, provided that there is sufficient evidence it's for the greater good of society*



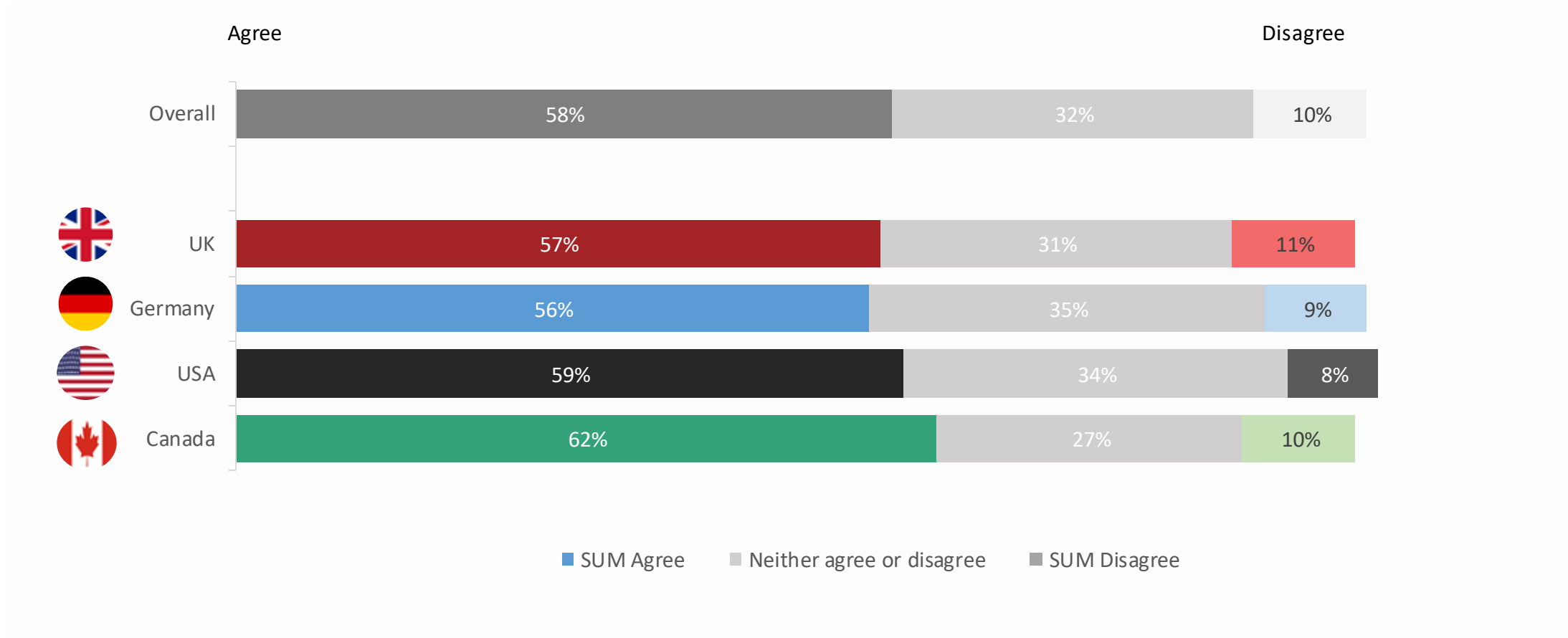
# A substantial majority think that governments should avoid intervening with these newer tech-enabled businesses (like Uber, Airbnb and Netflix) where possible to ensure consumers have the greatest possible choice of services

Taking what you've just read into account, to what extent do you agree or disagree with the statement below? *Governments should avoid intervening with these newer businesses where possible, so that consumers have the greatest possible choice of services*



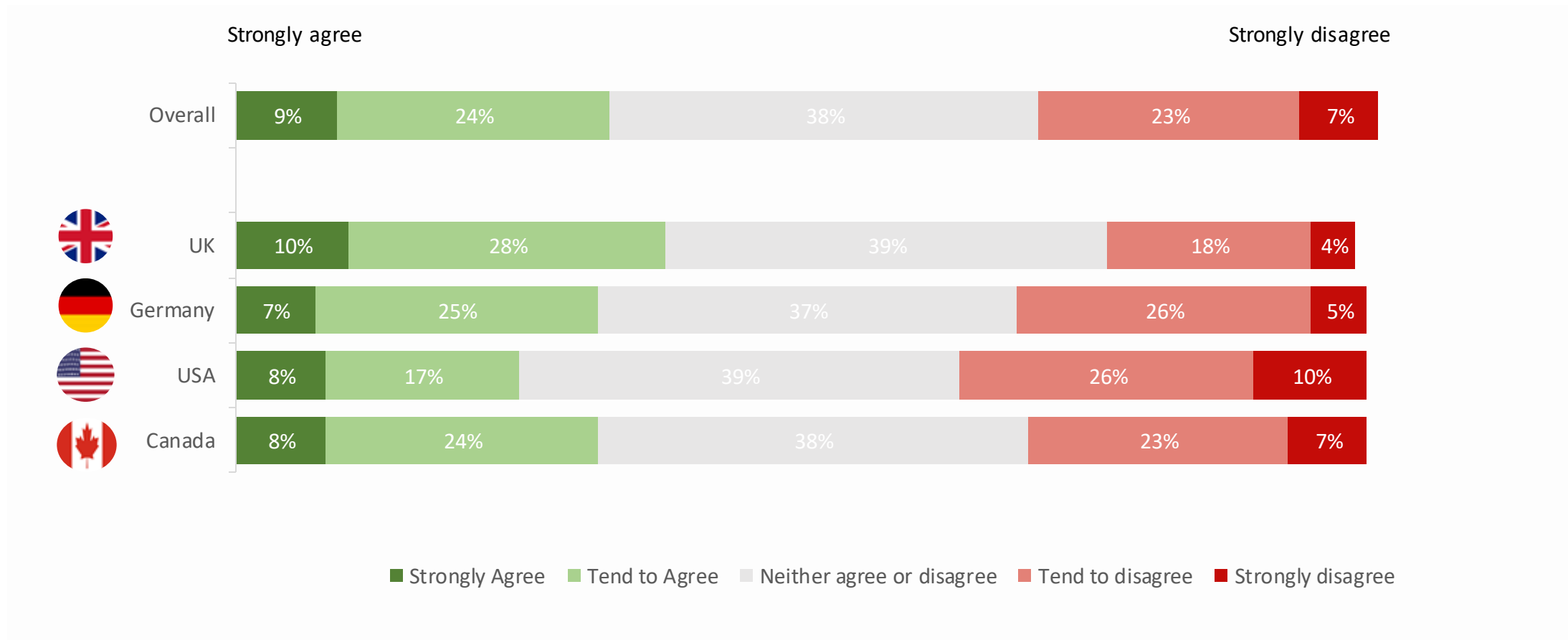
# Over five times as many people agree than disagree that a wide choice for consumers should be the main factor that defines whether a service in a competitive market succeeds or fails

Still thinking about these new types of companies like Uber, Airbnb, Netflix etc., to what extent do you agree or disagree with the following statements? *A wide choice for consumers should be the main factor that defines whether a service in a competitive market succeeds or fails*



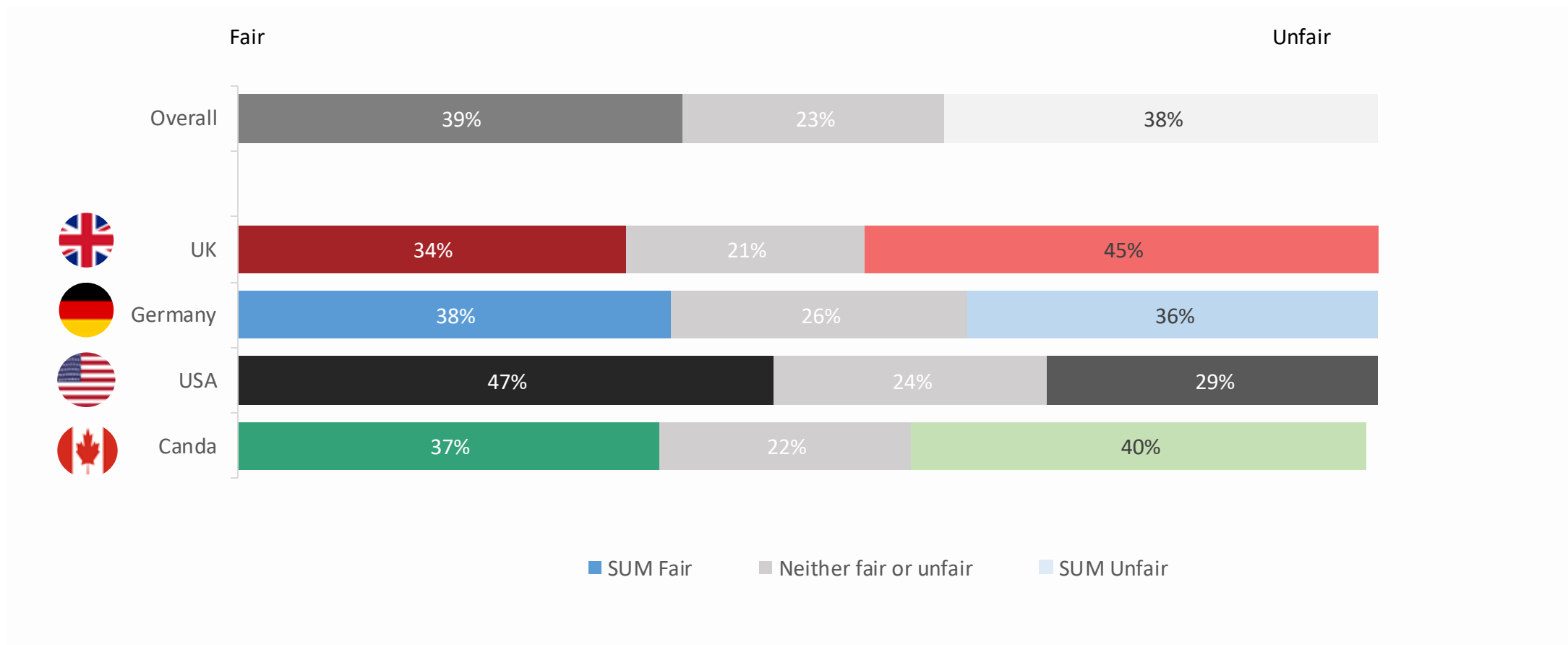
# Fewer than one in ten (9%) of people strongly agree and fewer than one in three (33%) agree that governments should be allowed to intervene in competitive markets, even if it may affect whether a service succeeds or fails

Still thinking about these new types of companies like Uber, Airbnb, Netflix etc., to what extent do you agree or disagree with the following statements? *Governments should be allowed to intervene in competitive markets, even if it may affect whether a service succeeds or fails*



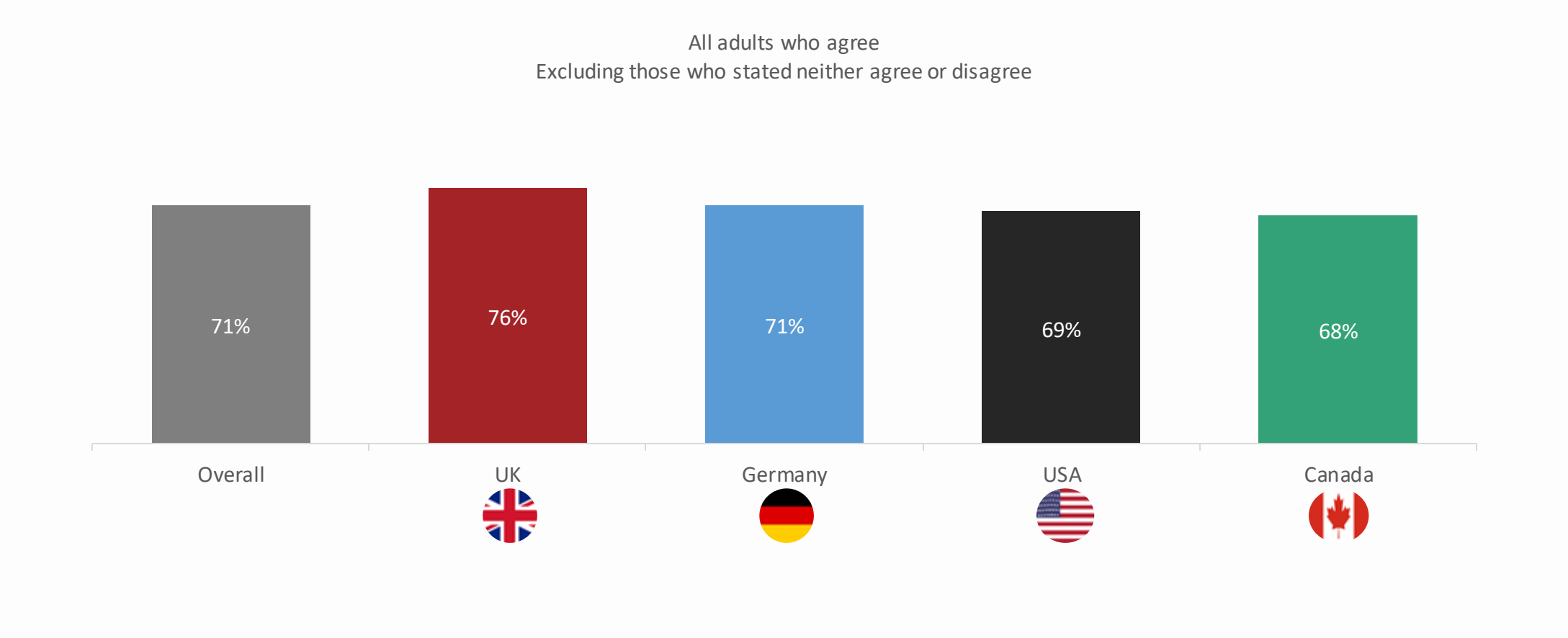
# Less than half of people surveyed think that if you are 18 and had the choice to vote in an election it is fair that you could not make the choice to buy alcohol until you are 21. However, more people in the USA think this is fair

If you were 18 and you had the choice to vote in an election, how fair or unfair do you believe it would be if you could not make the choice to buy alcohol until you are 21?



# The substantial majority agree that the banning of the sale of e-cigarettes in some countries is an example of excessive restrictions on adult lifestyle choices

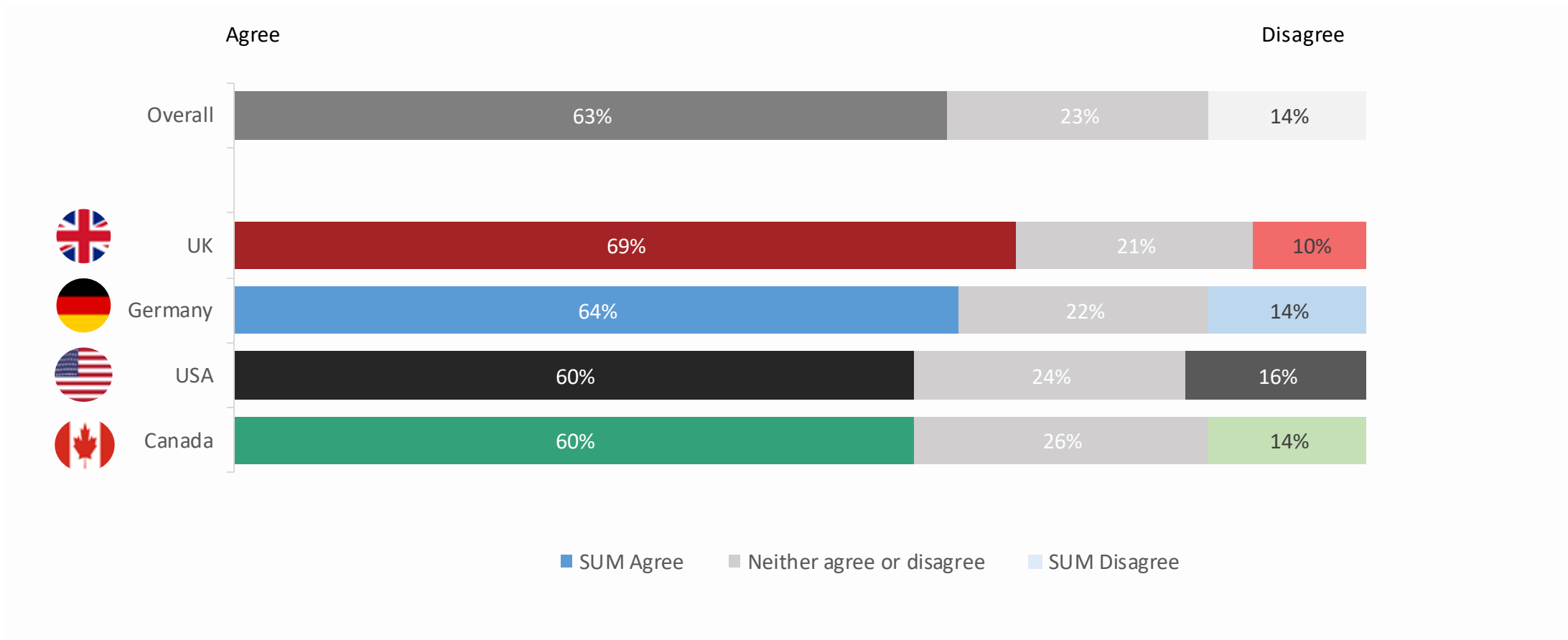
Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes? *The banning of the sale of e-cigarettes in some countries is an example of excessive restrictions on adult lifestyle choices*





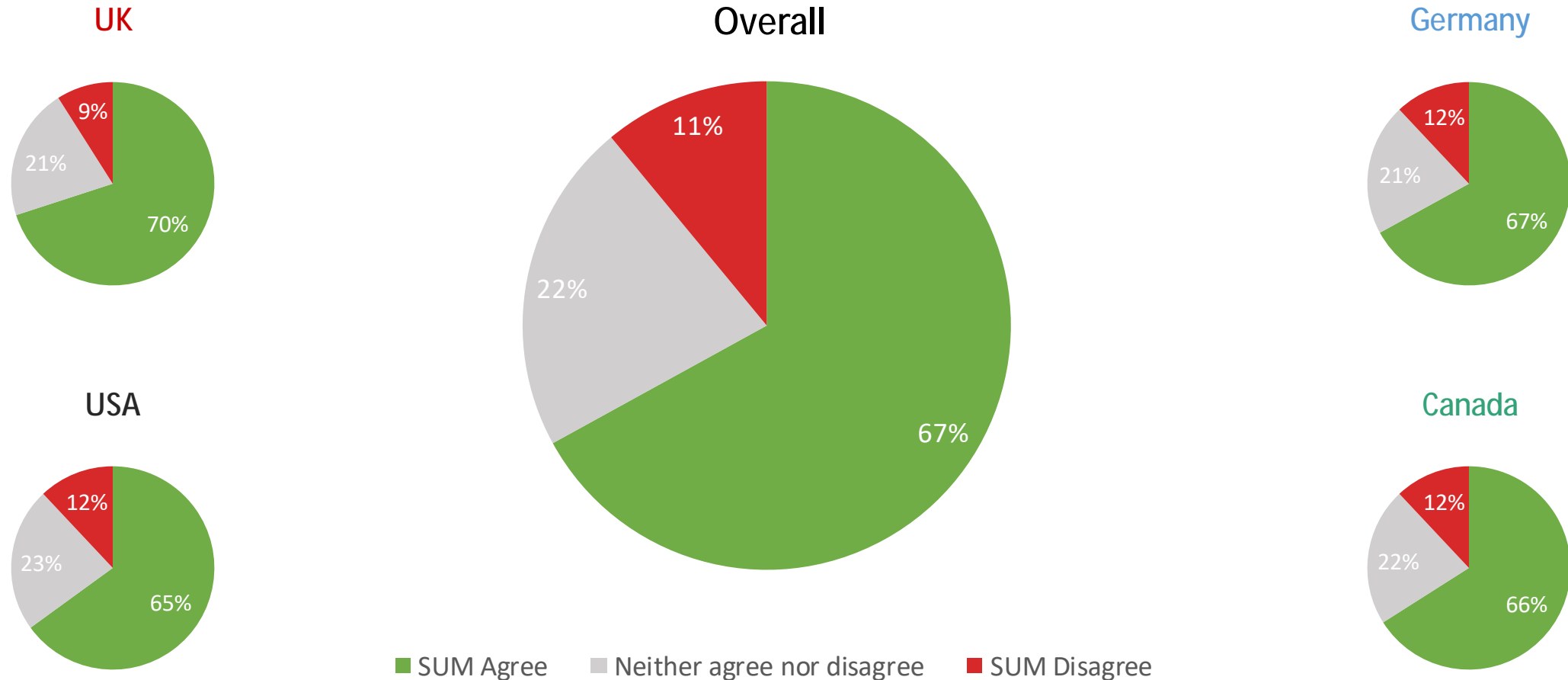
# Two thirds of people agree that they should have the freedom of choice to buy e-cigarettes if they believe they are a lower health risk to them than tobacco

Still thinking about these new types of companies like Uber, Airbnb, Netflix etc., to what extent do you agree or disagree with the following statements? *People should have the freedom of choice to buy e-cigarettes if they believe they are a lower health risk to them than tobacco*



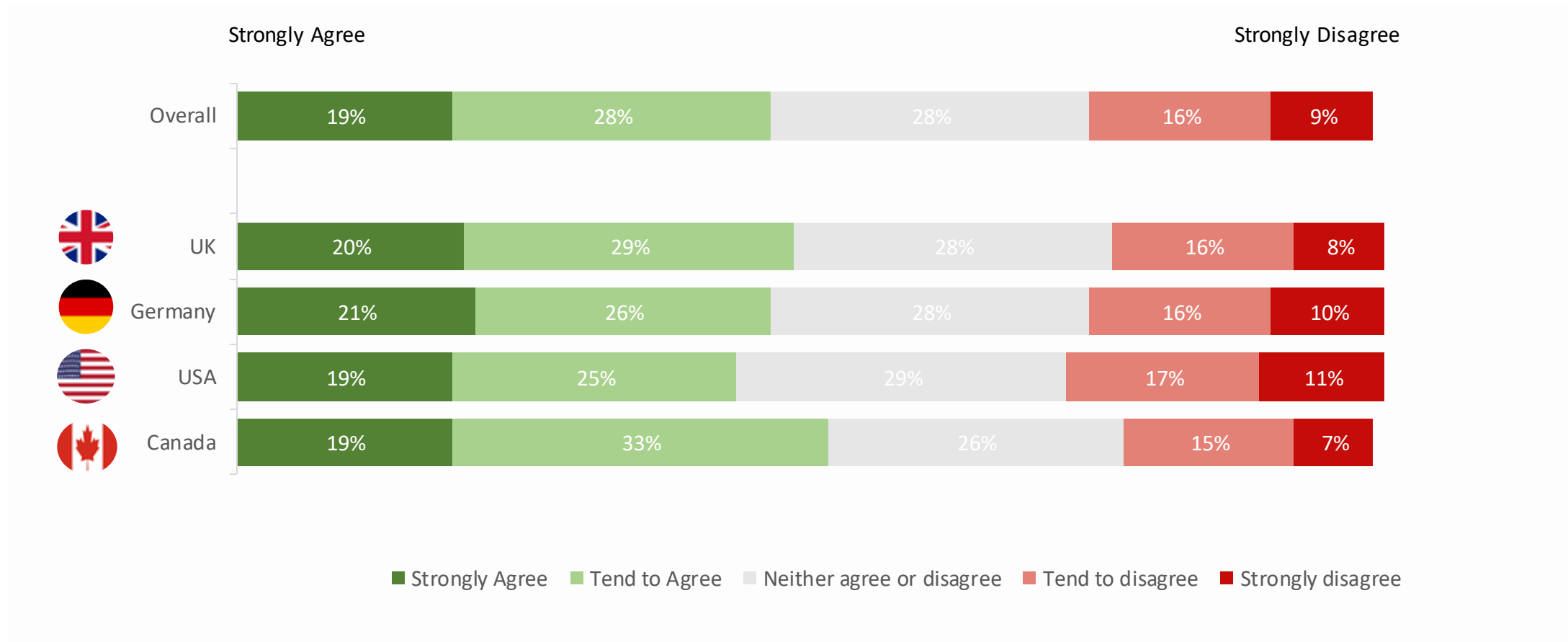
# Seven in ten people agree that if it is legal to buy cigarettes and tobacco in a country, then it should also be legal to buy e-cigarettes

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes? *If it is legal to buy cigarettes and tobacco in a country, then it should also be legal to buy e-cigarettes*



# A fifth of people strongly agree and just under half agree overall that if governments are unsure of the effect of e-cigarettes on a person's health they should have the right to ban their sale

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes? *Governments should have the right to ban the sale of e-cigarettes if they say they are unsure of their effect on a person's health*



UK

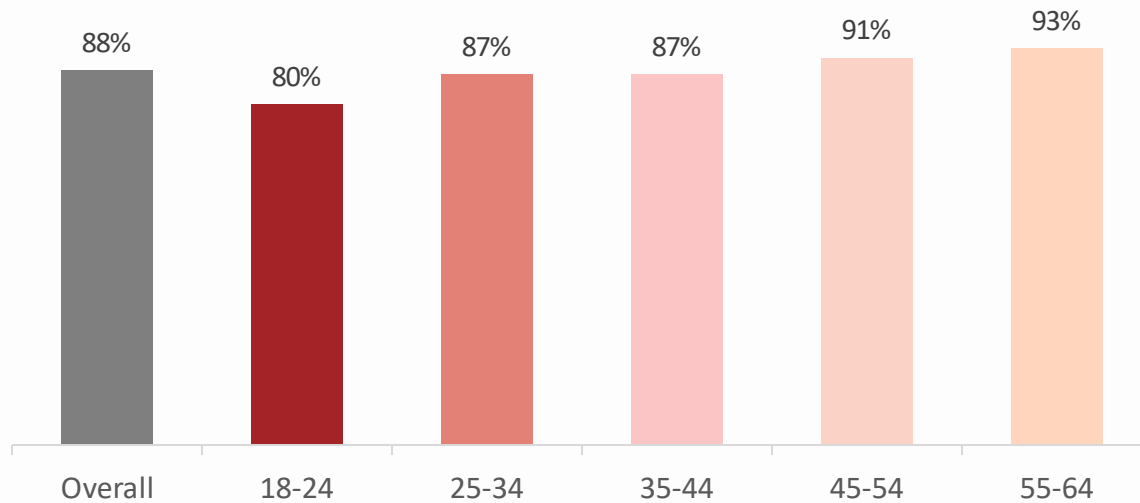
---

# Older age groups are more likely to agree there is too much bureaucracy and disagree that there is not enough regulation in society these days

To what extent do you agree or disagree with each of these statements about government policies?

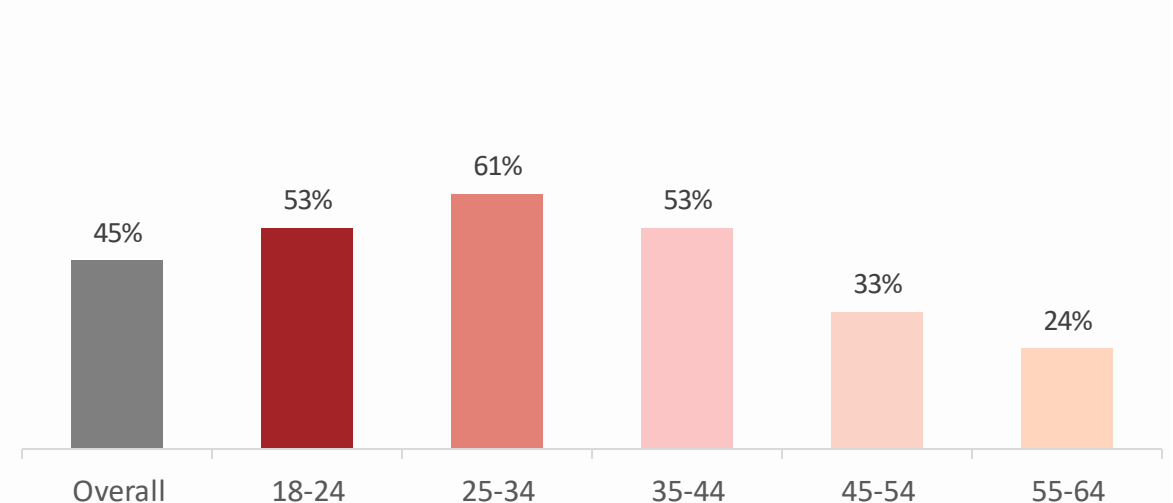
## There is too much bureaucracy in society these days

All adults who agree  
Excluding those who stated neither agree or disagree



## There is not enough regulation these days

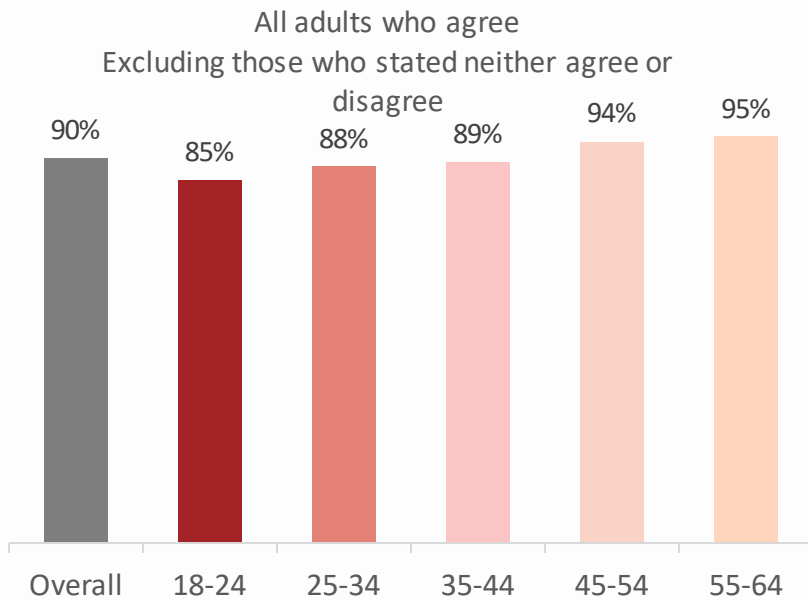
All adults who agree  
Excluding those who stated neither agree or disagree



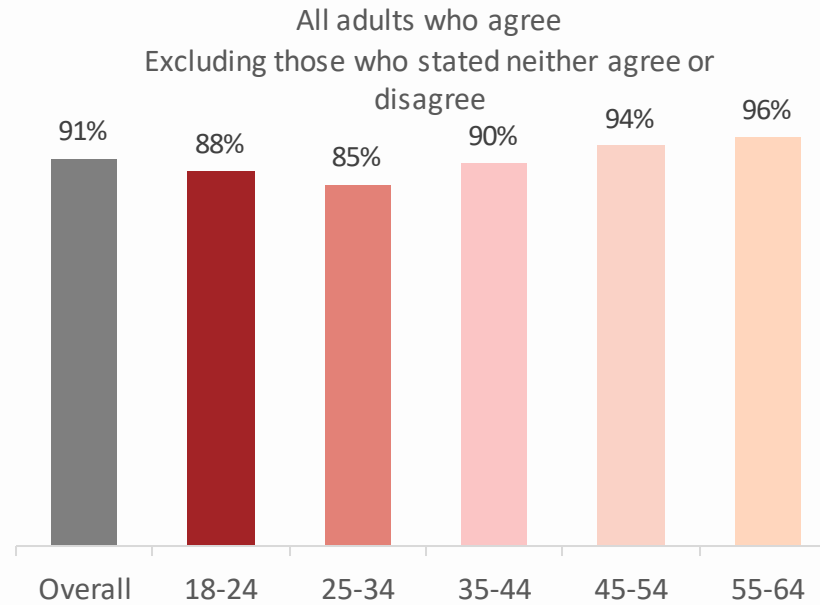
# Older age groups are more likely to agree that policy makers should listen and take account of consumer views, and speak to consumer rights groups before banning or restricting a product or service

To what extent do you agree or disagree with each of these statements about government policies? *Policy makers...*

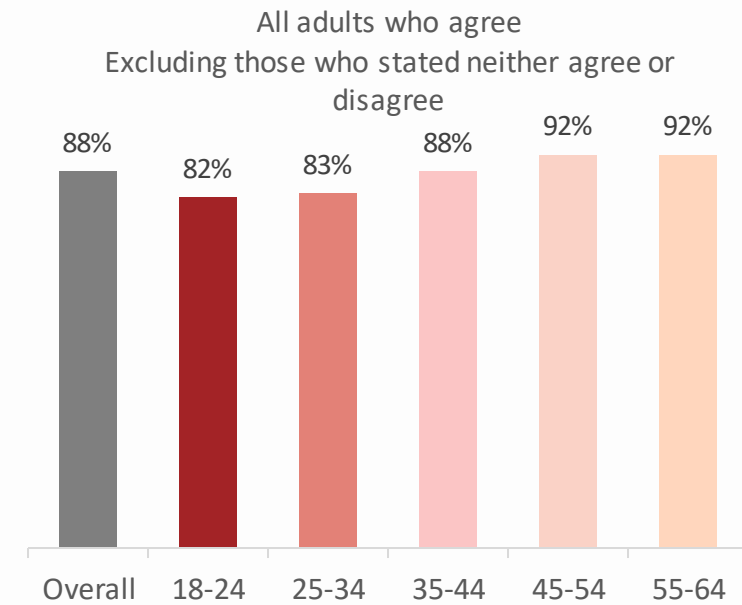
## Should take into account the views of consumers when deciding on regulation of lifestyle choices



## Don't spend enough time listening to consumers before proposing new regulation



## Should speak to consumer rights groups before banning or restricting access to a product or service

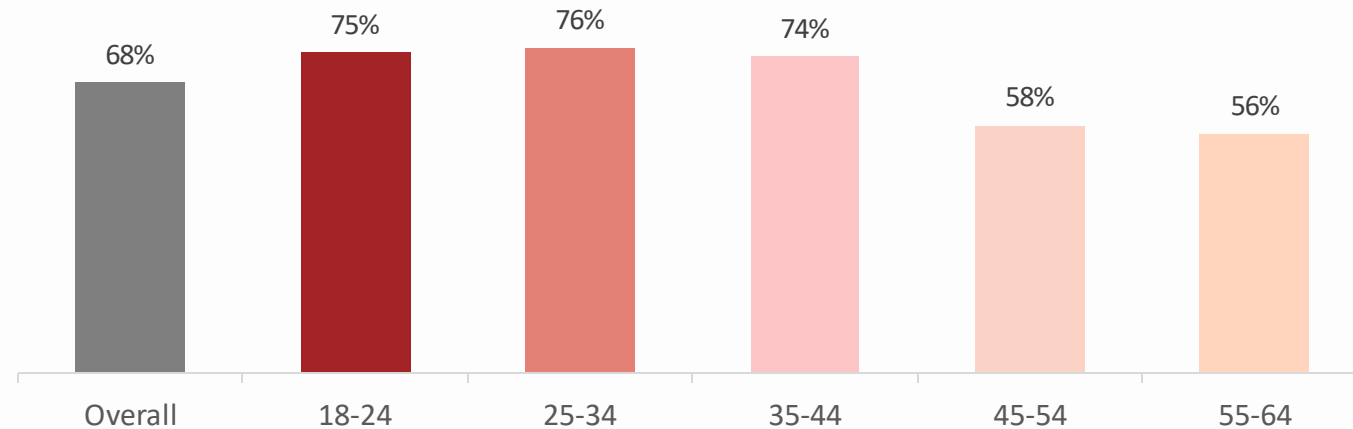


# The 18-44 age group are more likely to agree that governments should avoid intervening with these newer internet and smartphone type businesses where possible, so that consumers have the greatest possible choice of services

Still thinking about these new types of companies like Uber, Airbnb, Netflix etc., to what extent do you agree or disagree with the following statements?

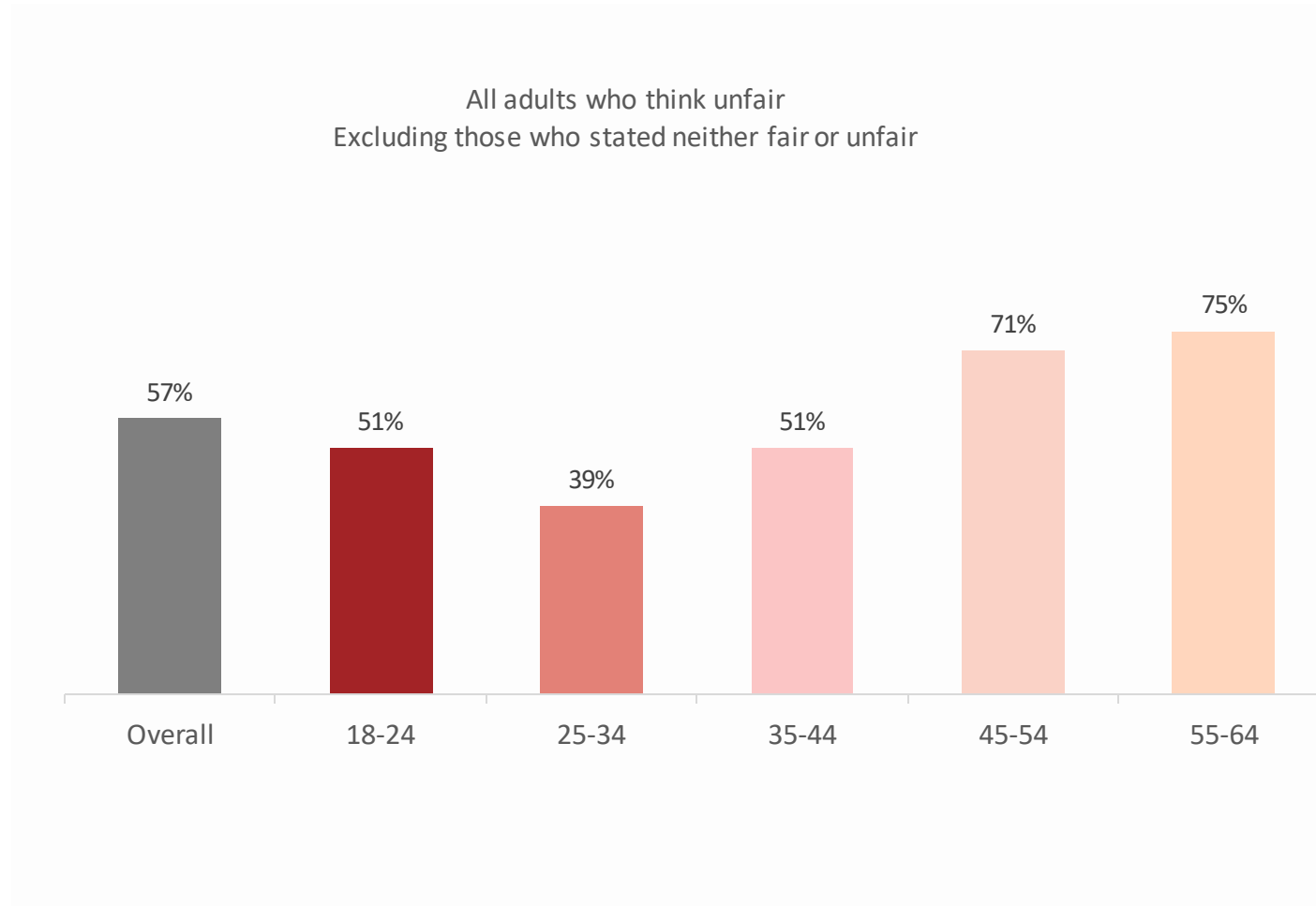
**Governments should avoid intervening with these newer businesses where possible, so that consumers have the greatest possible choice of services**

All adults who agree  
Excluding those who stated neither agree or disagree



# Older age groups are more likely to agree that it is unfair that if you were 18 and had the choice to vote in an election, you still could not choose to buy alcohol until you were 21

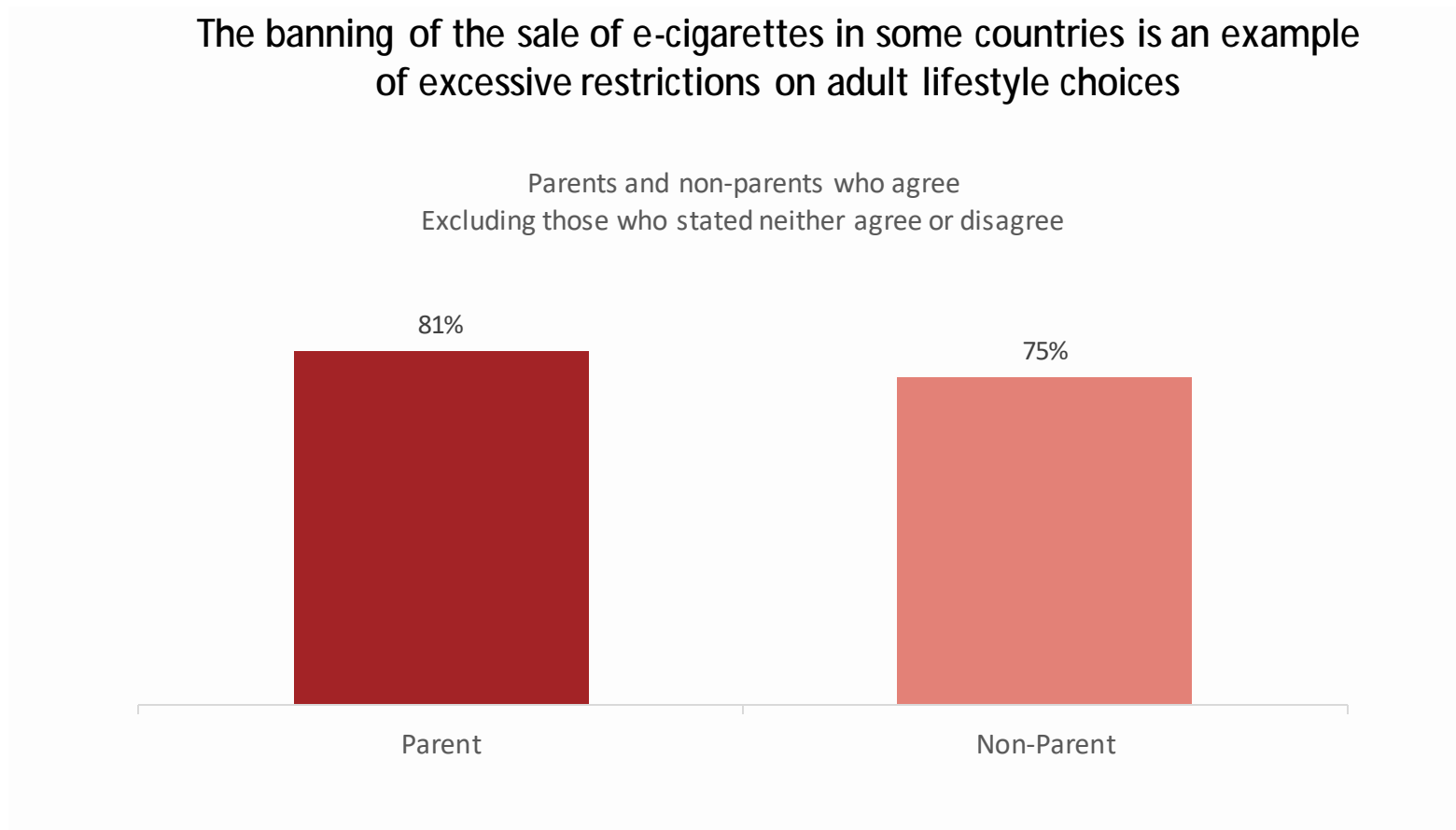
If you were 18 and you had the choice to vote in an election, how fair or unfair do you believe it would be if you could not make the choice to buy alcohol until you are 21?





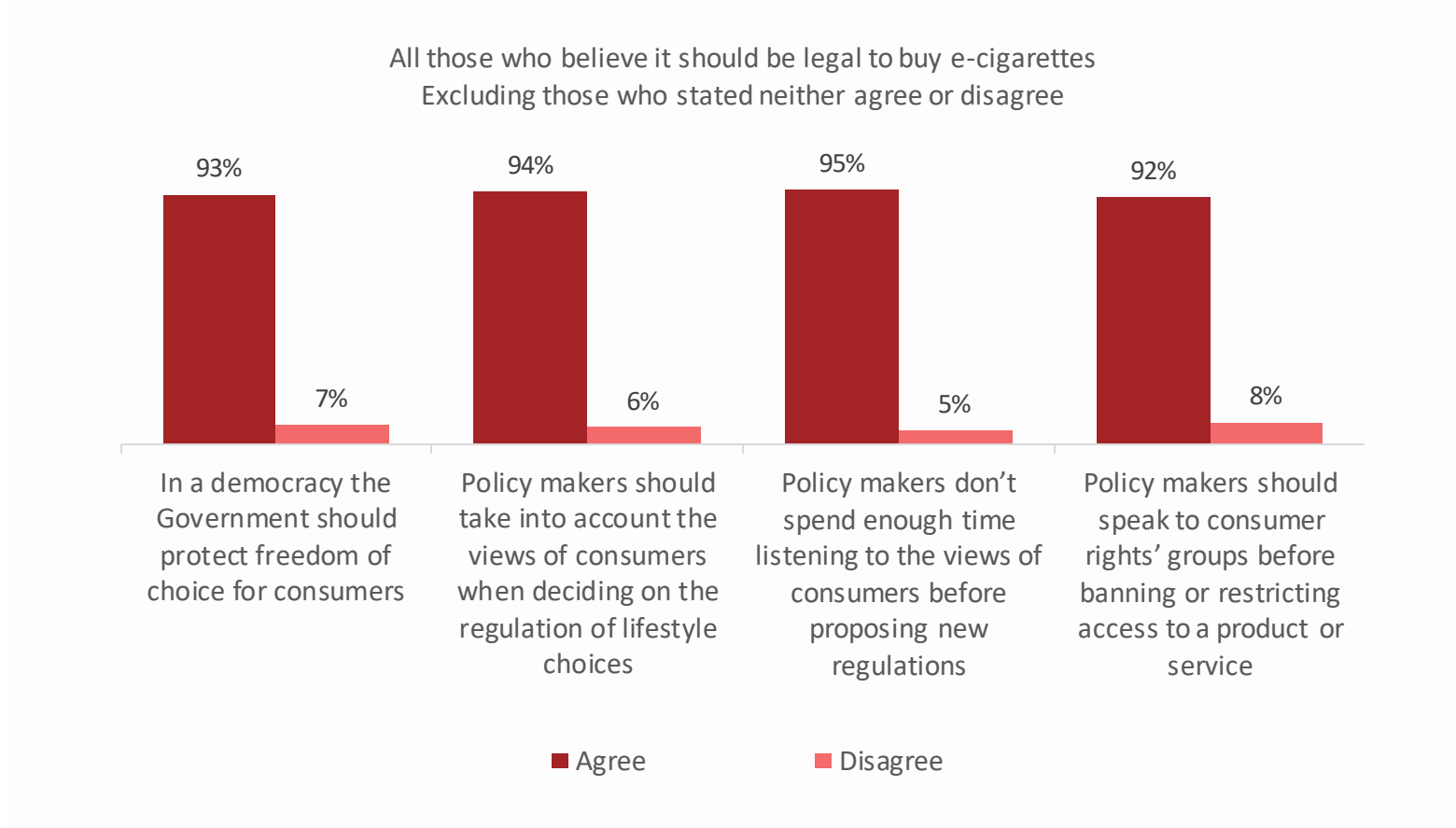
# Parents are more likely to agree that the banning of the sale of e-cigarettes in some countries is an example of excessive restrictions on adult lifestyle choices

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes?



# Those who agree that policy makers should listen to consumers/speak to consumer rights' group and that a democratic governments role is to protect freedom of choice are more likely to agree that it should be legal to buy e-cigarettes

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes? If it is legal to buy cigarettes and tobacco in a country, then it should also be legal to buy e-cigarettes

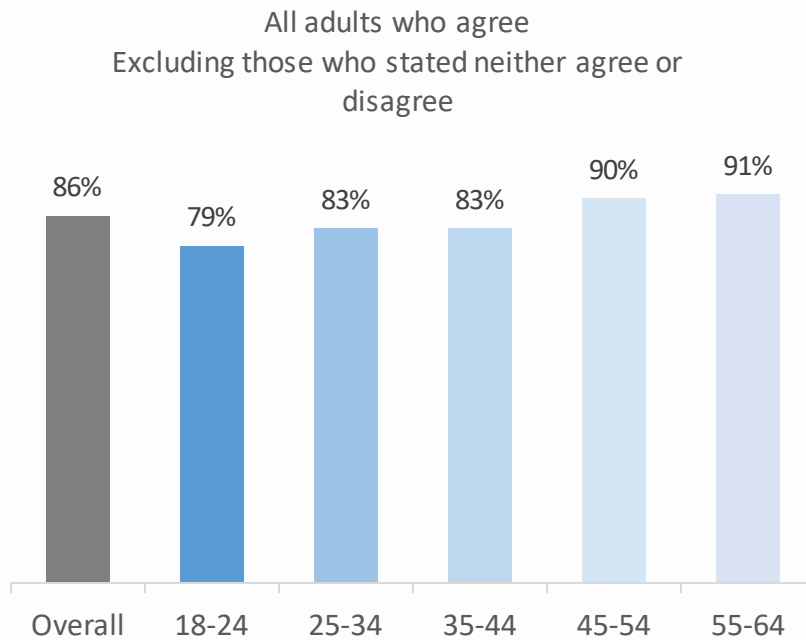


Germany

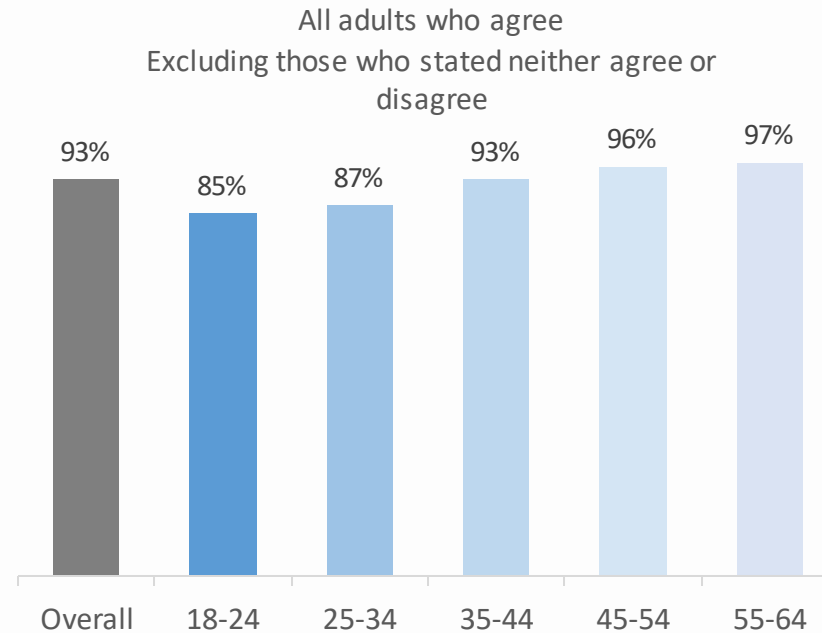
# Older age groups are more likely to agree there is too much bureaucracy, there is too much government intervention in the choices an adult makes and that in a democracy government should protect freedom of choice

To what extent do you agree or disagree with each of these statements about government policies?

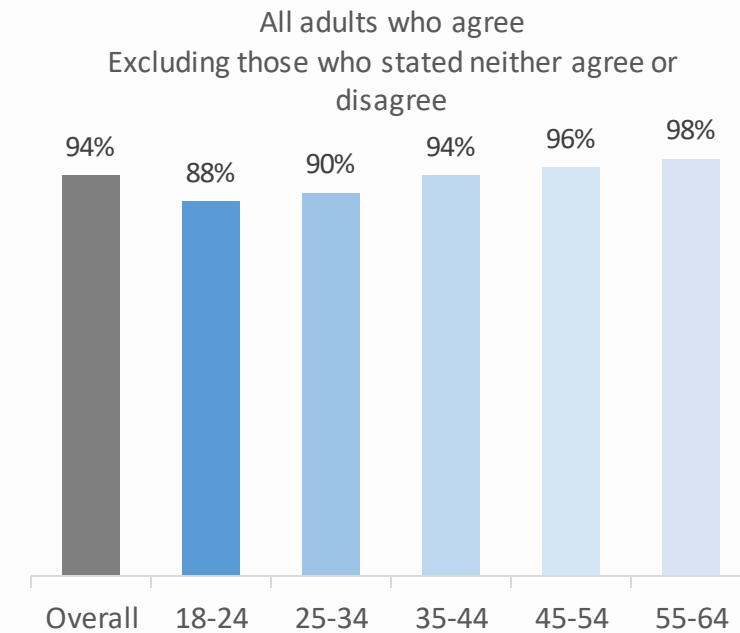
There should be minimal government intervention in the choices an adult makes if buying a product or service that is legal



There is too much bureaucracy in society these days



In a democracy government should protect freedom of choice for consumers

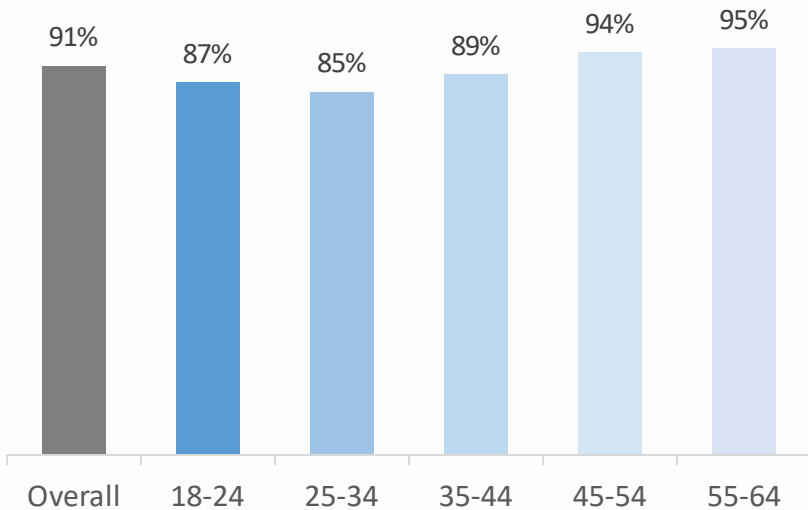


# Older age groups are more likely to agree that policy makers should listen and take account of consumer views and consumer rights groups before banning or restricting a product or service

To what extent do you agree or disagree with each of these statements about government policies? *Policy makers...*

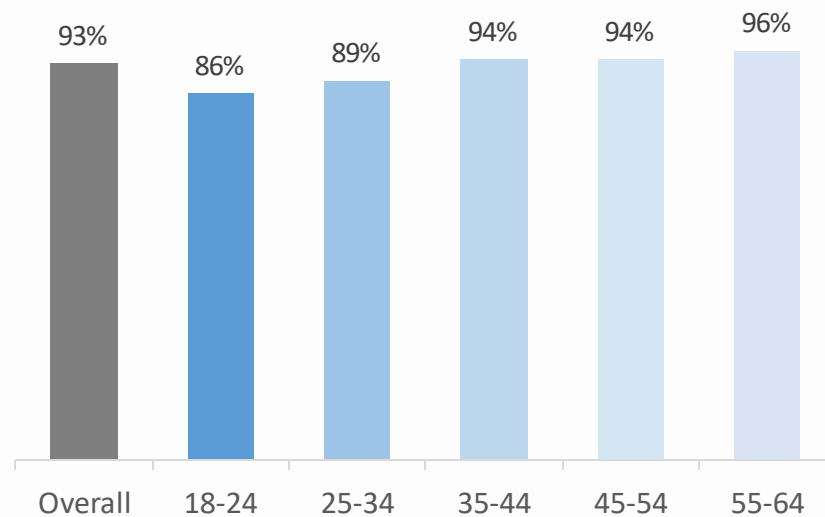
## Should take into account the views of consumers when deciding on regulation of lifestyle choices

All adults who agree  
Excluding those who stated neither agree or disagree



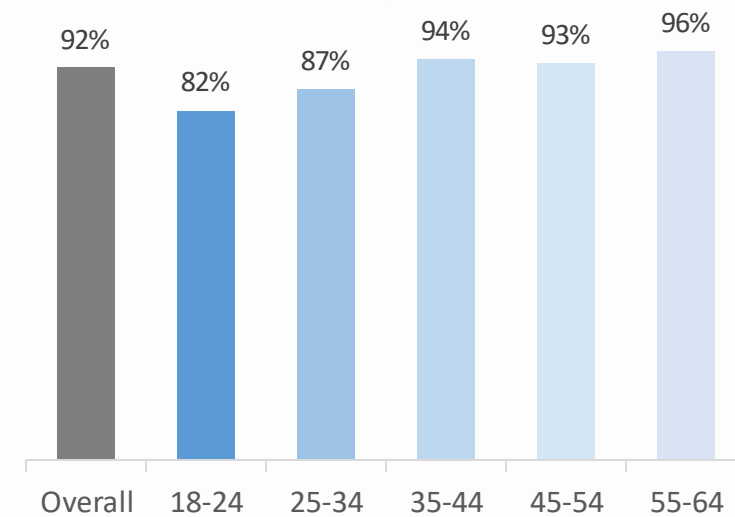
## Don't spend enough time listening to the views of consumers before proposing new regulations

All adults who agree  
Excluding those who stated neither agree or disagree



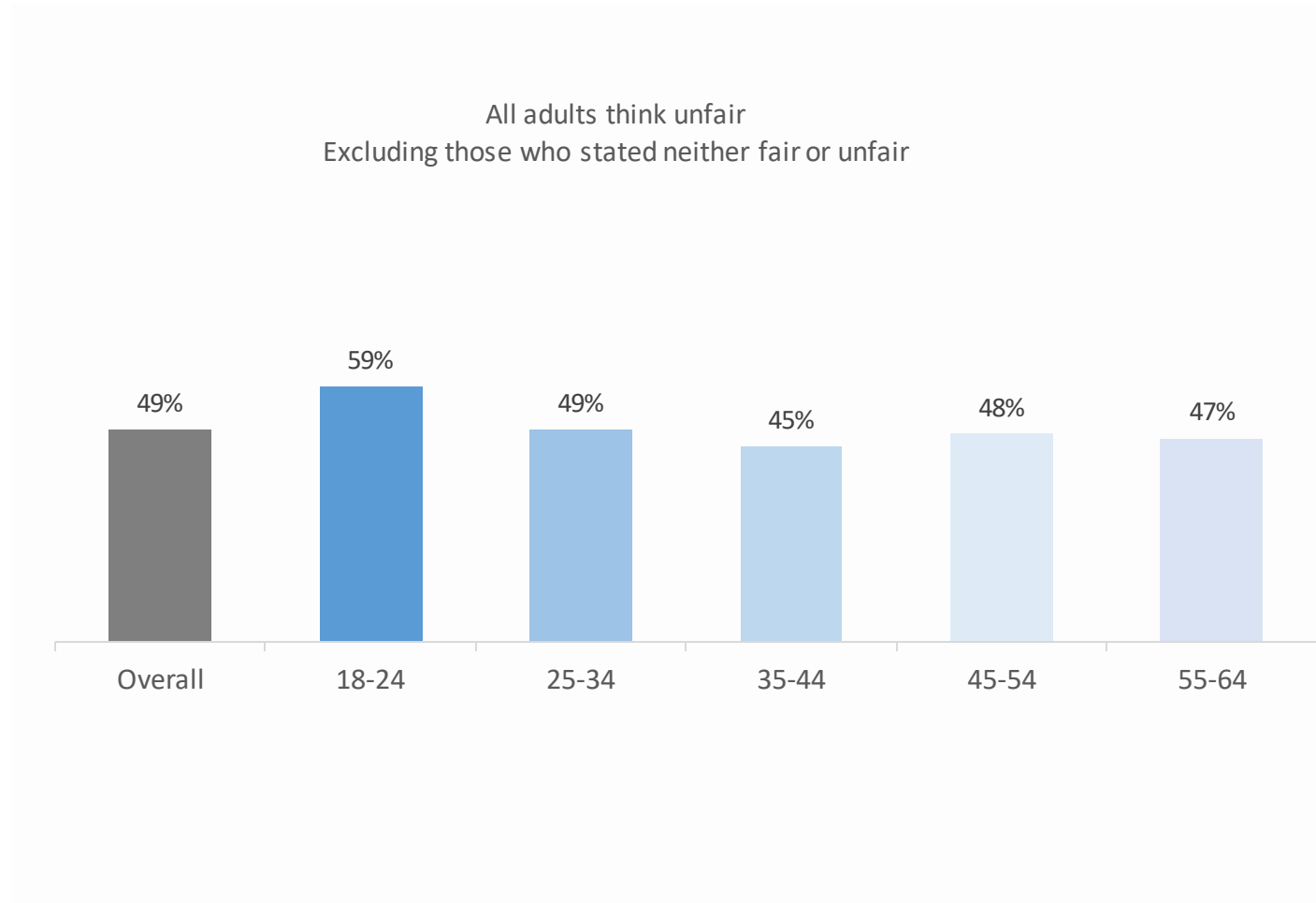
## Should speak to consumer rights groups before banning or restricting access to a product or service

All adults who agree  
Excluding those who stated neither agree or disagree



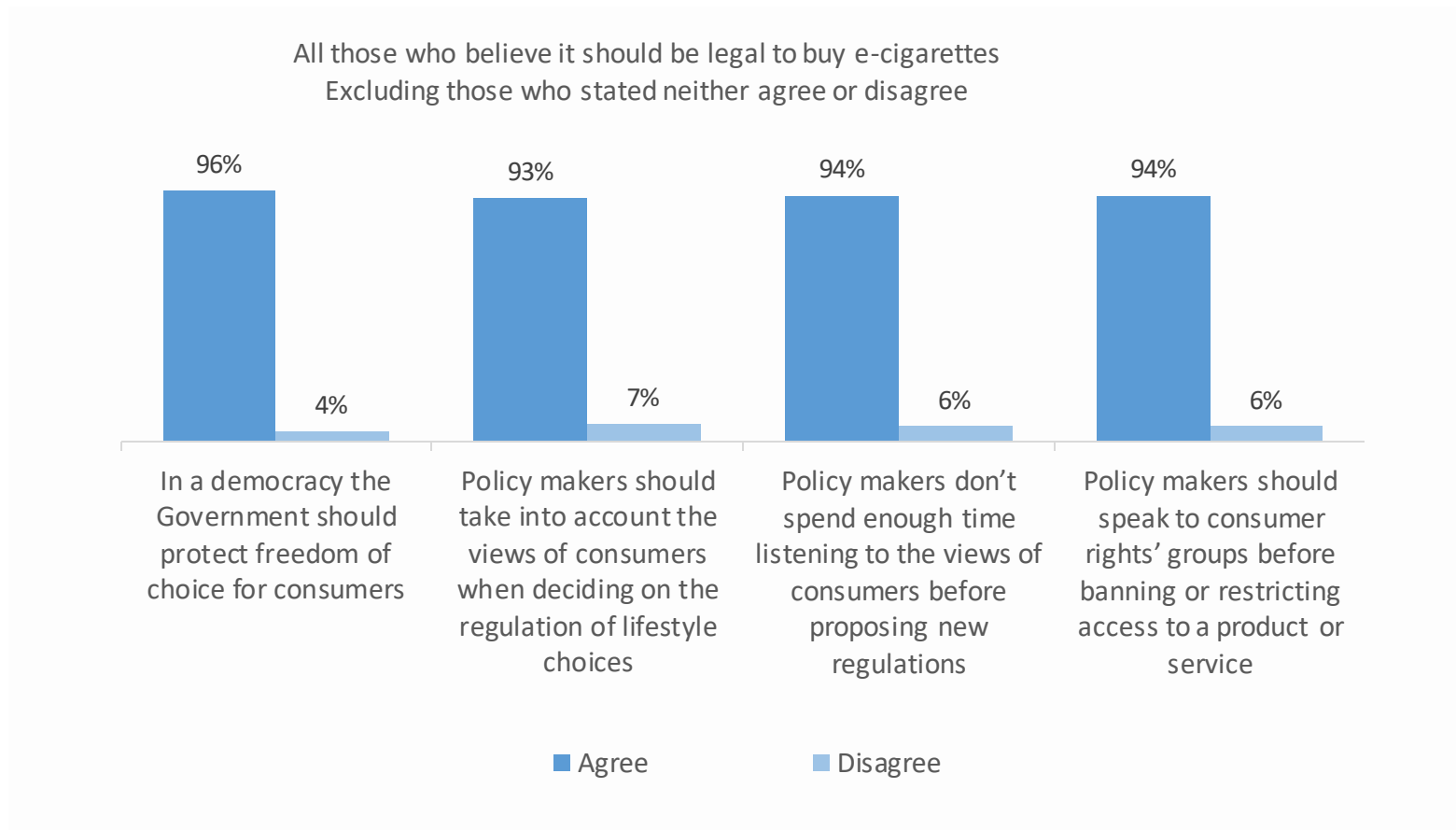
# Those aged 18-24 are more likely to agree that it is unfair if you were 18 and had the choice to vote in an election that you still could not choose to buy alcohol until you are 21

If you were 18 and you had the choice to vote in an election, how fair or unfair do you believe it would be if you could not make the choice to buy alcohol until you are 21?



# Those who agree that policy makers should listen to consumers/speak to consumer rights' groups and that a democratic government's role is to protect freedom of choice are more likely to agree that it should be legal to buy e-cigarettes

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes? If it is legal to buy cigarettes and tobacco in a country, then it should also be legal to buy e-cigarettes



Base: Germany Those who agree if it is legal to buy cigarettes and tobacco in a country then it should also be legal to buy e-cigarettes (1240, 1139, 1189, 1130)

USA

---

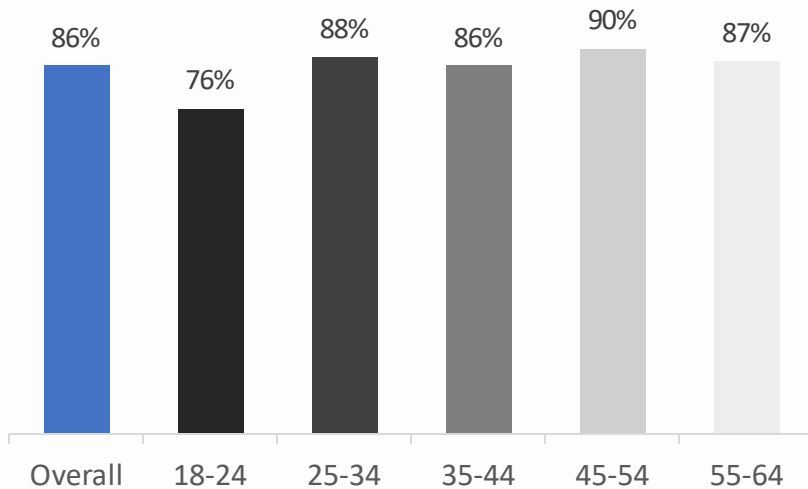


# Older age groups are more likely to agree there is too much bureaucracy, there should be minimal intervention in choices an adult makes and disagree that there is not enough regulation

To what extent do you agree or disagree with each of these statements about government policies?

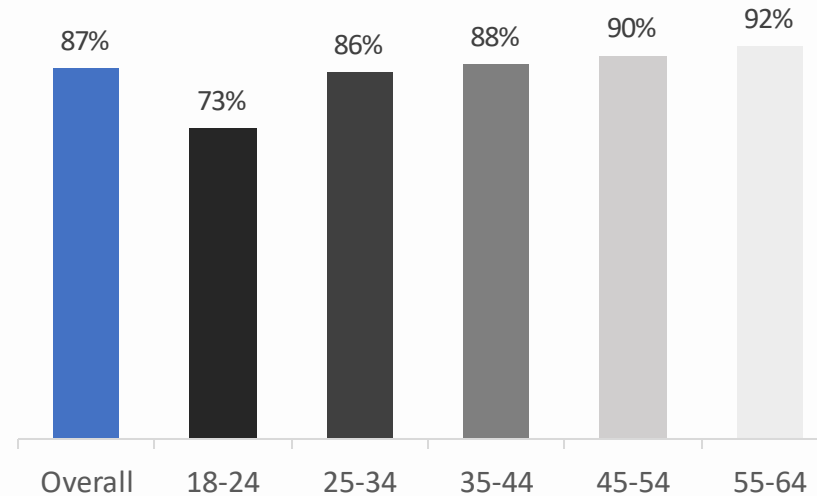
There should be minimal government intervention in the choices an adult makes if buying a product or service that is legal

All adults who agree  
Excluding those who stated neither agree or disagree



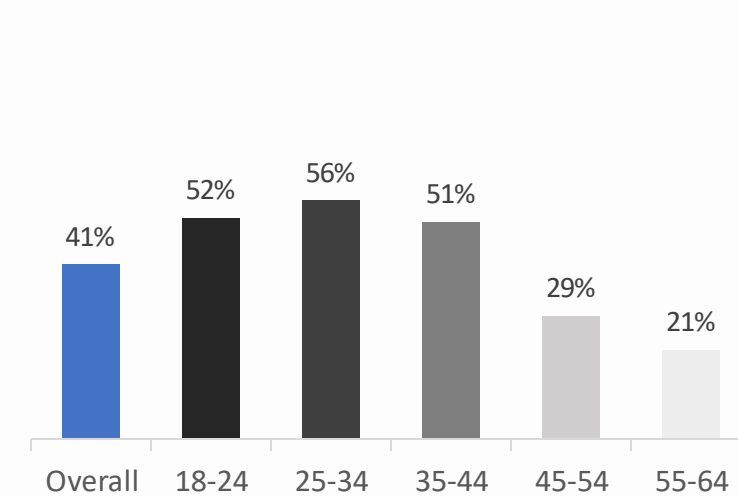
There is too much bureaucracy in society these days

All adults who agree  
Excluding those who stated neither agree or disagree



There is not enough regulation these days

All adults who agree  
Excluding those who stated neither agree or disagree

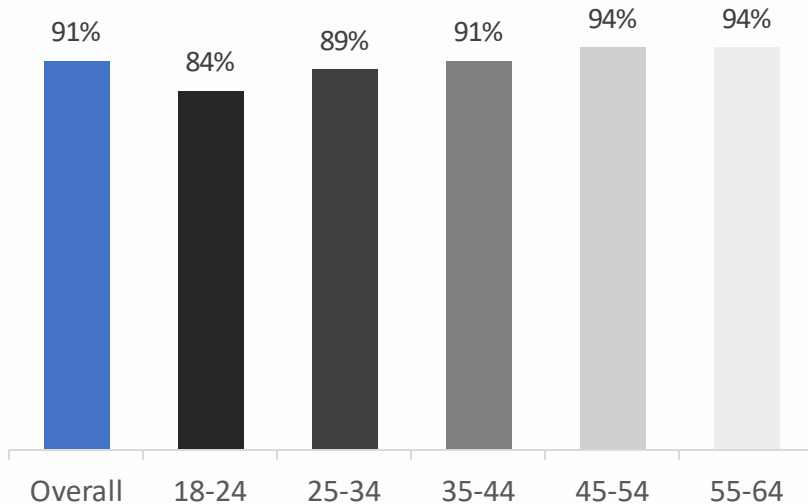


# Older age groups are more likely to agree that policy makers should listen and take account of consumer views/speak to consumer rights groups before banning or restricting a product or service

To what extent do you agree or disagree with each of these statements about government policies? *Policy makers...*

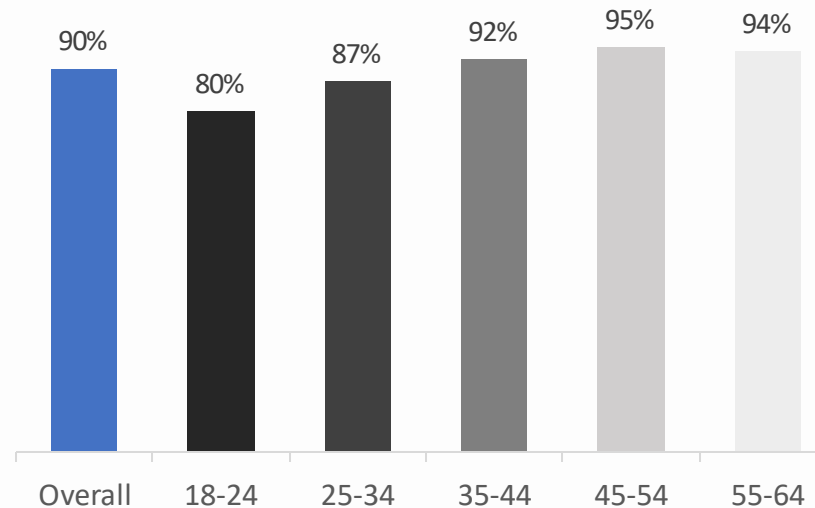
## Should take into account the views of consumers when deciding on regulation of lifestyle choices

All adults who agree  
Excluding those who stated neither agree or disagree



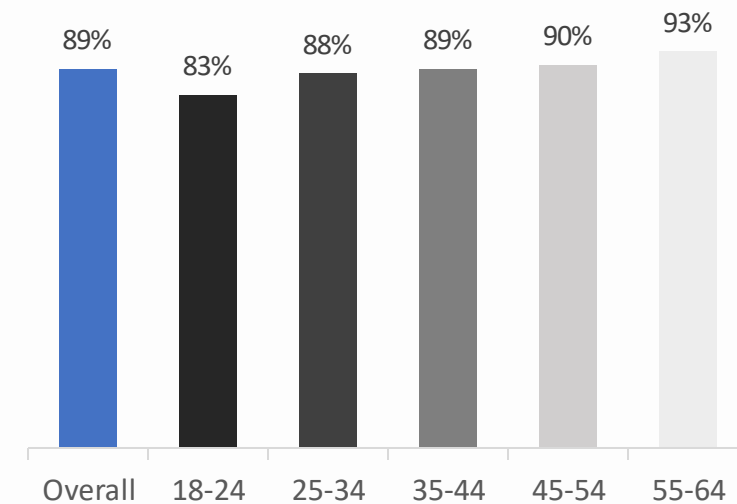
## Don't spend enough time listening to the views of consumers before proposing new regulations

All adults who agree  
Excluding those who stated neither agree or disagree



## Should speak to consumer rights groups before banning or restricting access to a product or service

All adults who agree  
Excluding those who stated neither agree or disagree

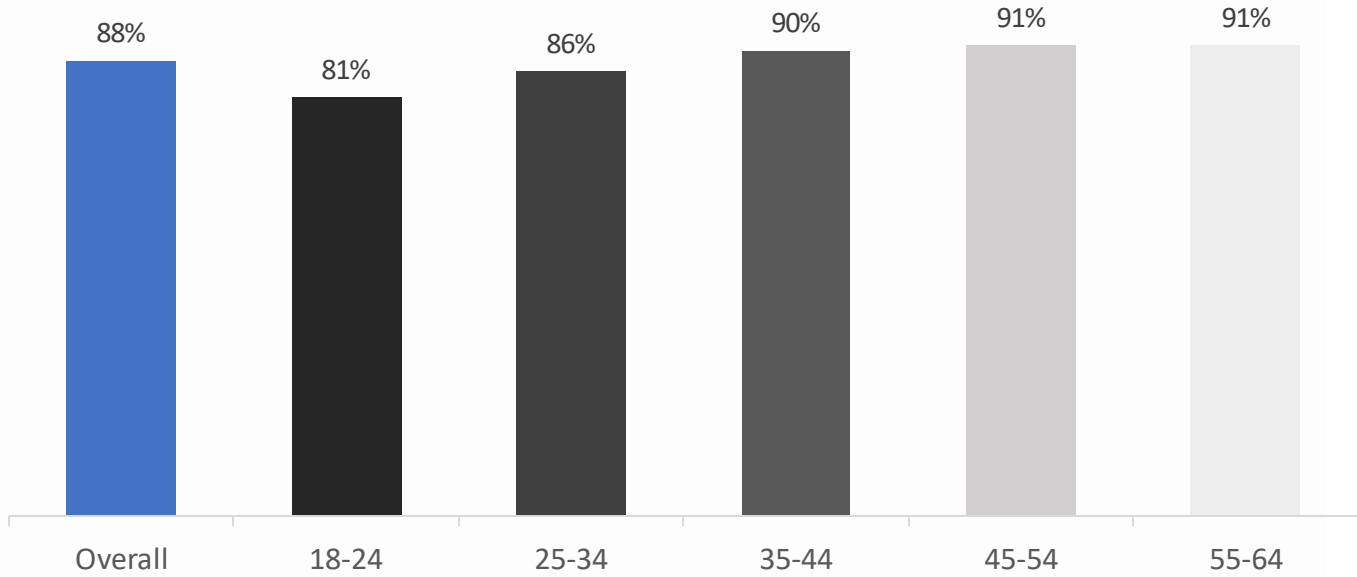


# Those aged 35-64 are more likely to agree that a wide choice for consumers should be the main factor that defines whether a product or service succeeds

Still thinking about these new types of companies like Uber, Airbnb, Netflix etc., to what extent do you agree or disagree with the following statements?

**A wide choice for consumers should be the main factor that defines whether a service in a competitive market succeeds or fails**

All adults who agree  
Excluding those who stated neither agree or disagree

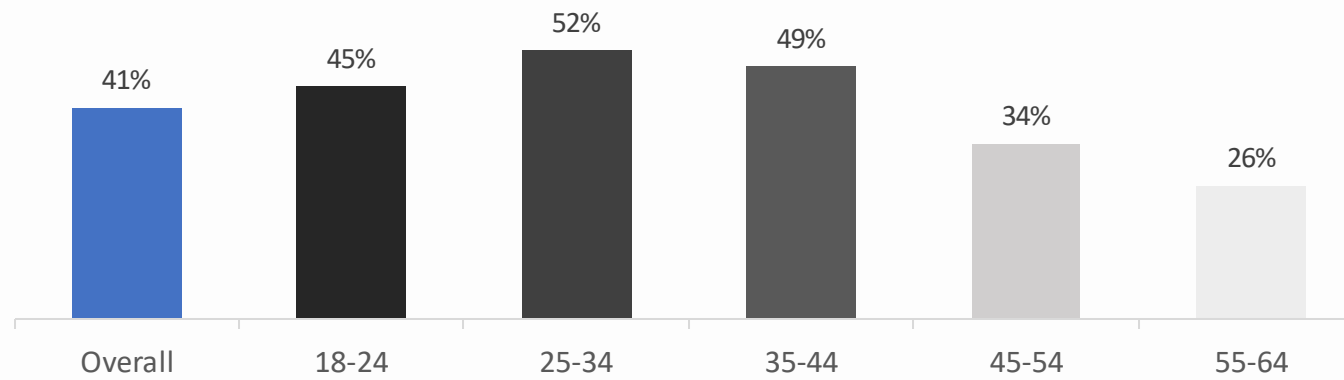


# Older age groups are more likely to disagree that government should be allowed to intervene in competitive markets, even if it may affect whether a product succeeds or fails

Still thinking about these new types of companies like Uber, Airbnb, Netflix etc., to what extent do you agree or disagree with the following statements?

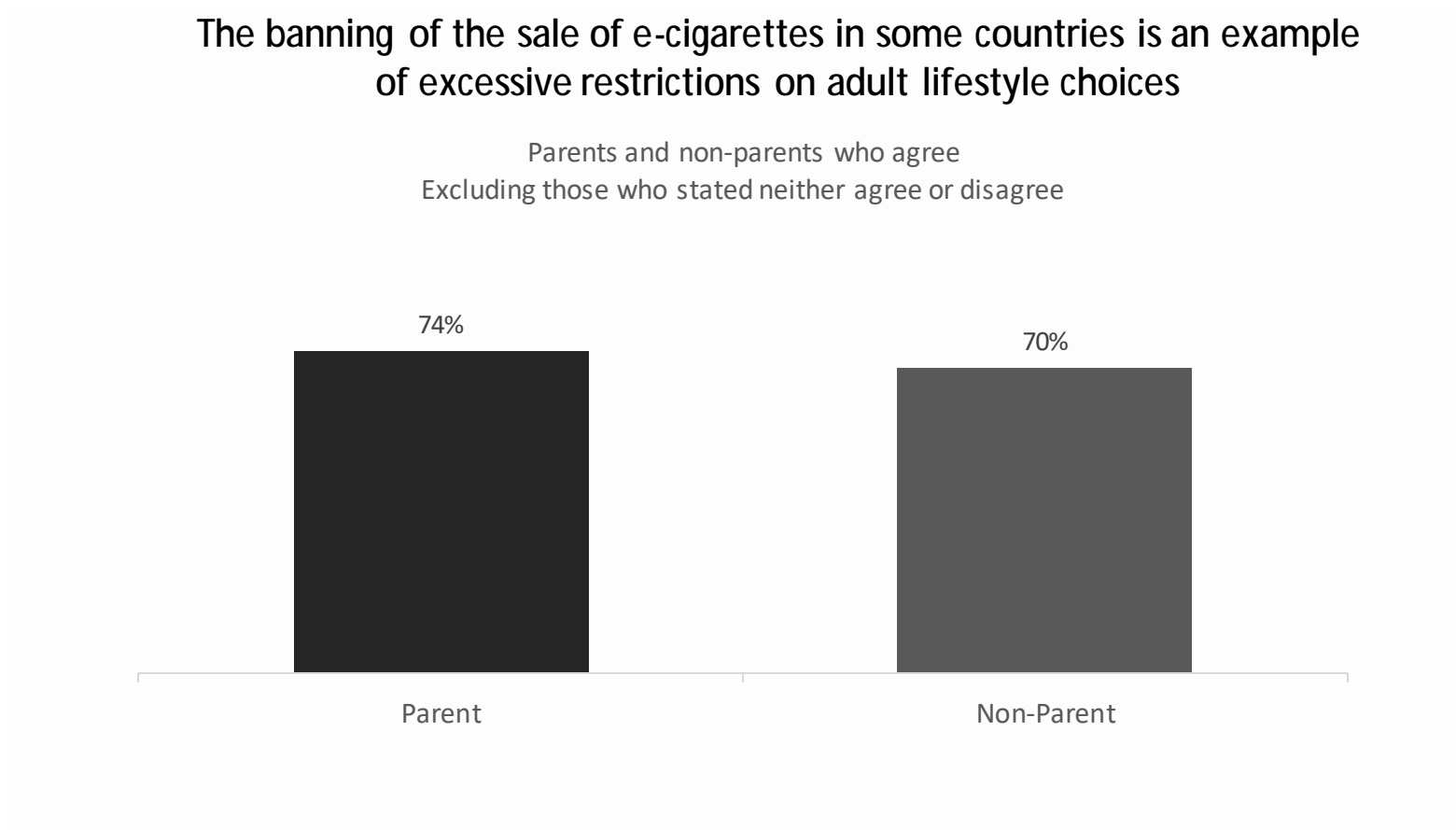
**Governments should be allowed to intervene in competitive markets, even if it may affect whether a service succeeds or fails**

All adults who agree  
Excluding those who neither agree or disagree



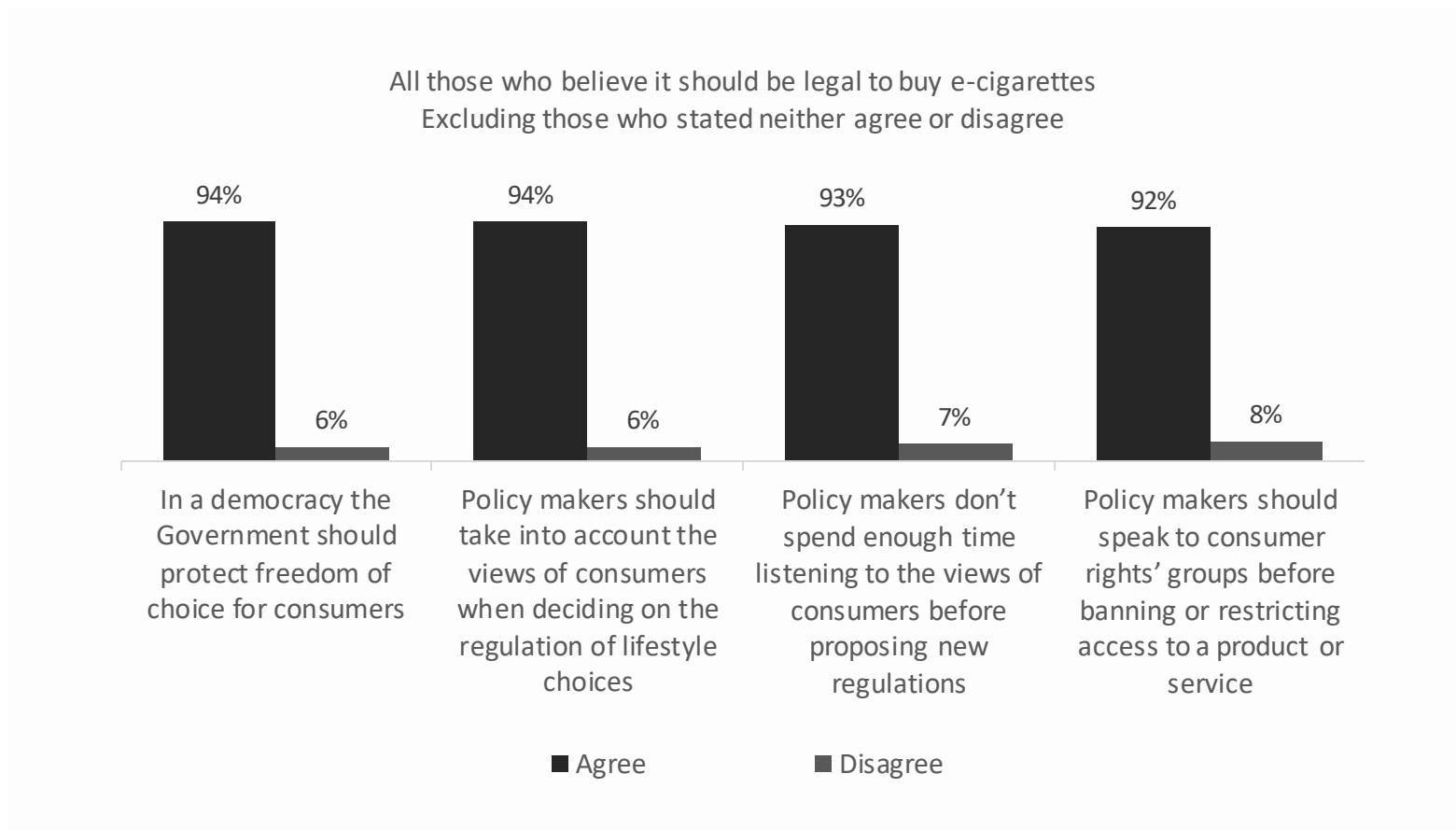
# Parents are more likely to agree that the banning of the sale of e-cigarettes in some countries is an example of excessive restrictions on adult lifestyle choices than non-parents

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes?



# Those who agree that policy makers should listen to consumers/consumer rights' groups and that a democratic government's role is to protect freedom of choice are more likely to agree that it should be legal to buy e-cigarettes

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes? - ... If it is legal to buy cigarettes and tobacco in a country, then it should also be legal to buy e-cigarettes



Canada

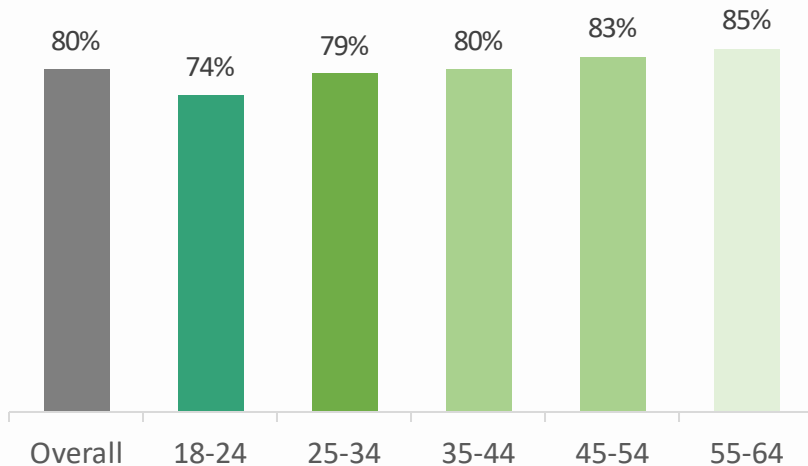
---

# Older age groups are more likely to agree there is too much bureaucracy, there should be minimal intervention in choices an adult makes and disagree that there is not enough regulation

To what extent do you agree or disagree with each of these statements about government policies?

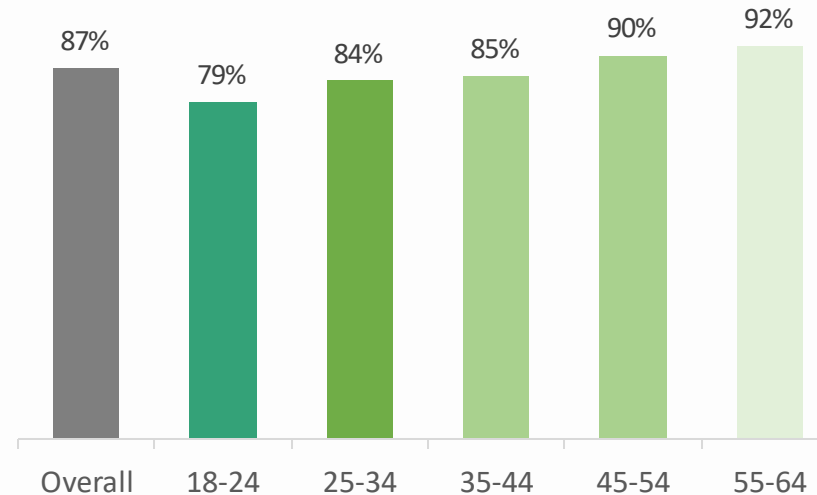
There should be minimal government intervention in the choices an adult makes if buying a product or service that is legal

All adults who agree  
Excluding those who stated neither agree or disagree



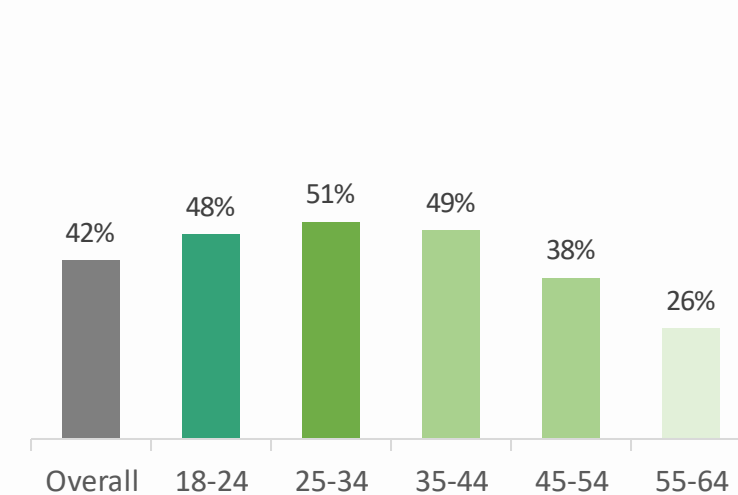
There is too much bureaucracy in society these days

All adults who agree  
Excluding those who stated neither agree or disagree



There is not enough regulation these days

All adults who agree  
Excluding those who stated neither agree or disagree



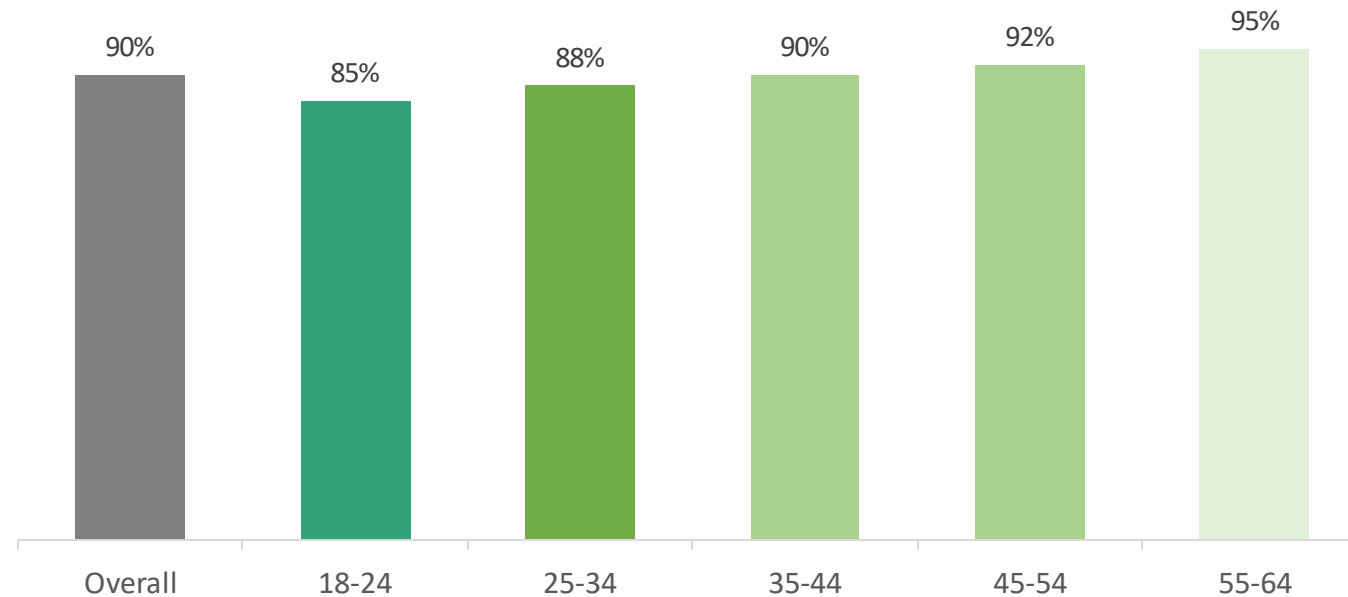


# Older age groups are more likely to agree that in a democracy, government should protect freedom of choice for consumers

to what extent do you agree or disagree with each of these statements about government policies? *In a democracy, the government should protect freedom of choice for consumers*

## In a democracy, the government should protect freedom of choice for consumers

All adults who agree  
Excluding those who stated neither agree or disagree

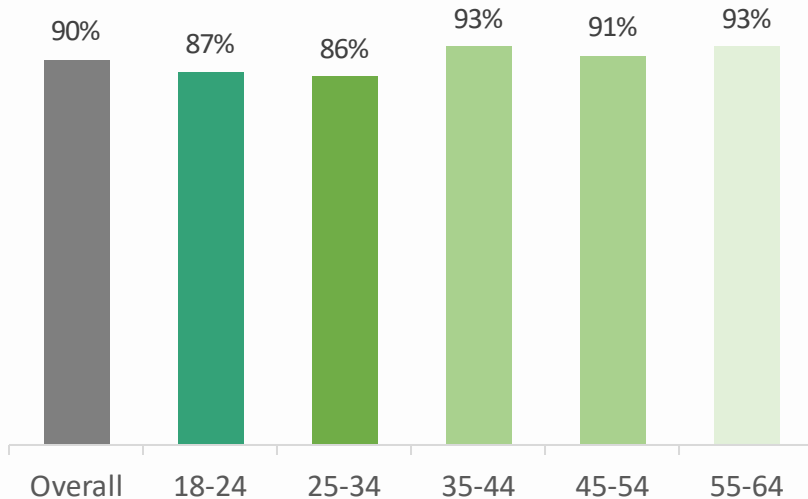


# Older age groups are more likely to agree policy makers should listen and take account of consumer views/speak to consumer rights groups before banning or restricting a product or service

To what extent do you agree or disagree with each of these statements about government policies? *Policy makers...*

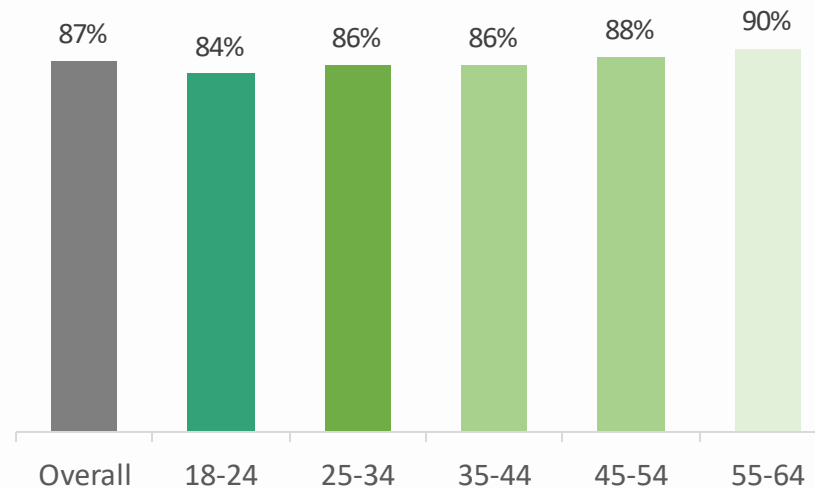
## Should take into account the views of consumers when decided on regulation of lifestyle choices

All adults who agree  
Excluding those who stated neither agree or disagree



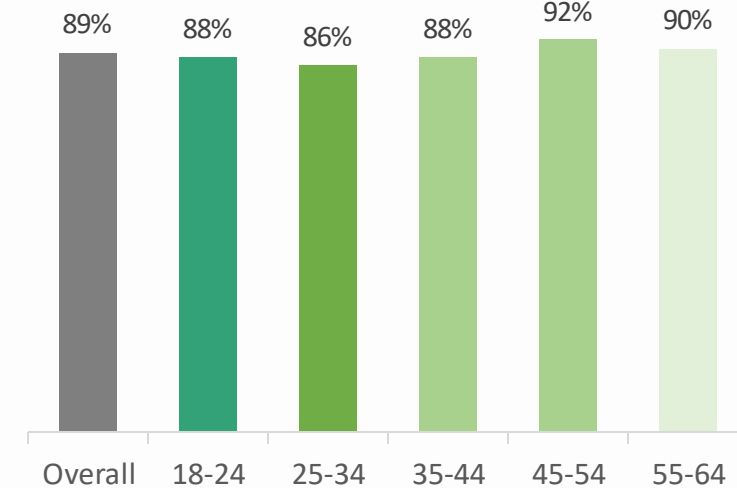
## Don't spend enough time listening to the views of consumers before proposing new regulations

All adults who agree  
Excluding those who stated neither agree or disagree



## Should speak to consumer rights groups before banning or restricting access to a product or service

All adults who agree  
Excluding those who stated neither agree or disagree

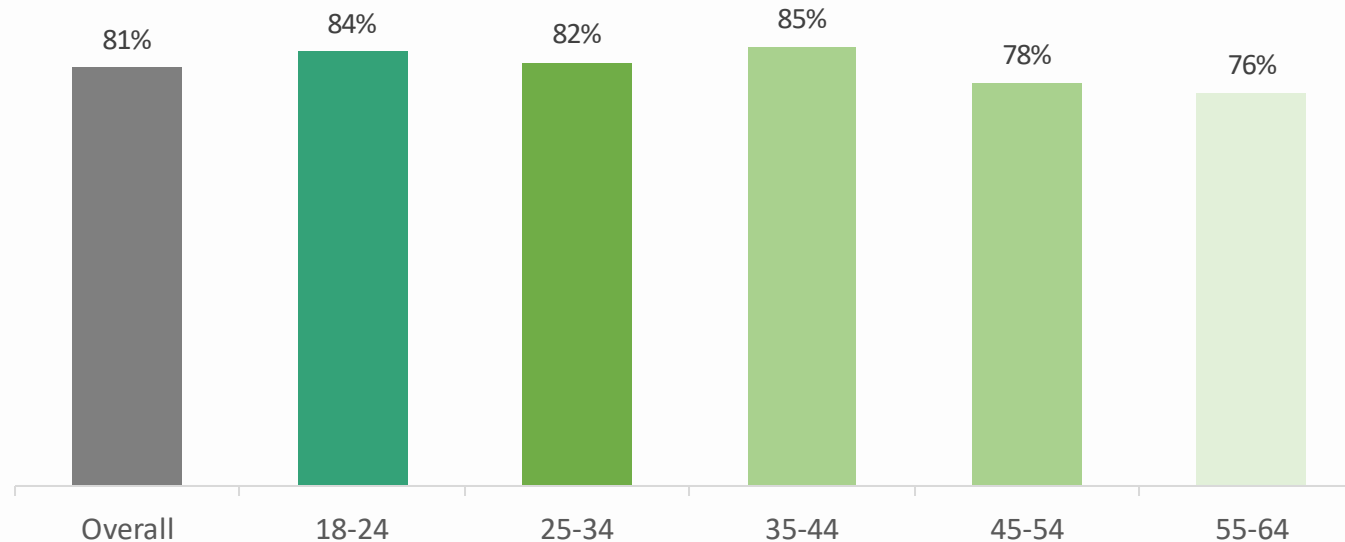


# Younger age groups are more likely to agree that people should have the freedom of choice to buy e-cigarettes if they believe they are a lower health risk to them than tobacco

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes?

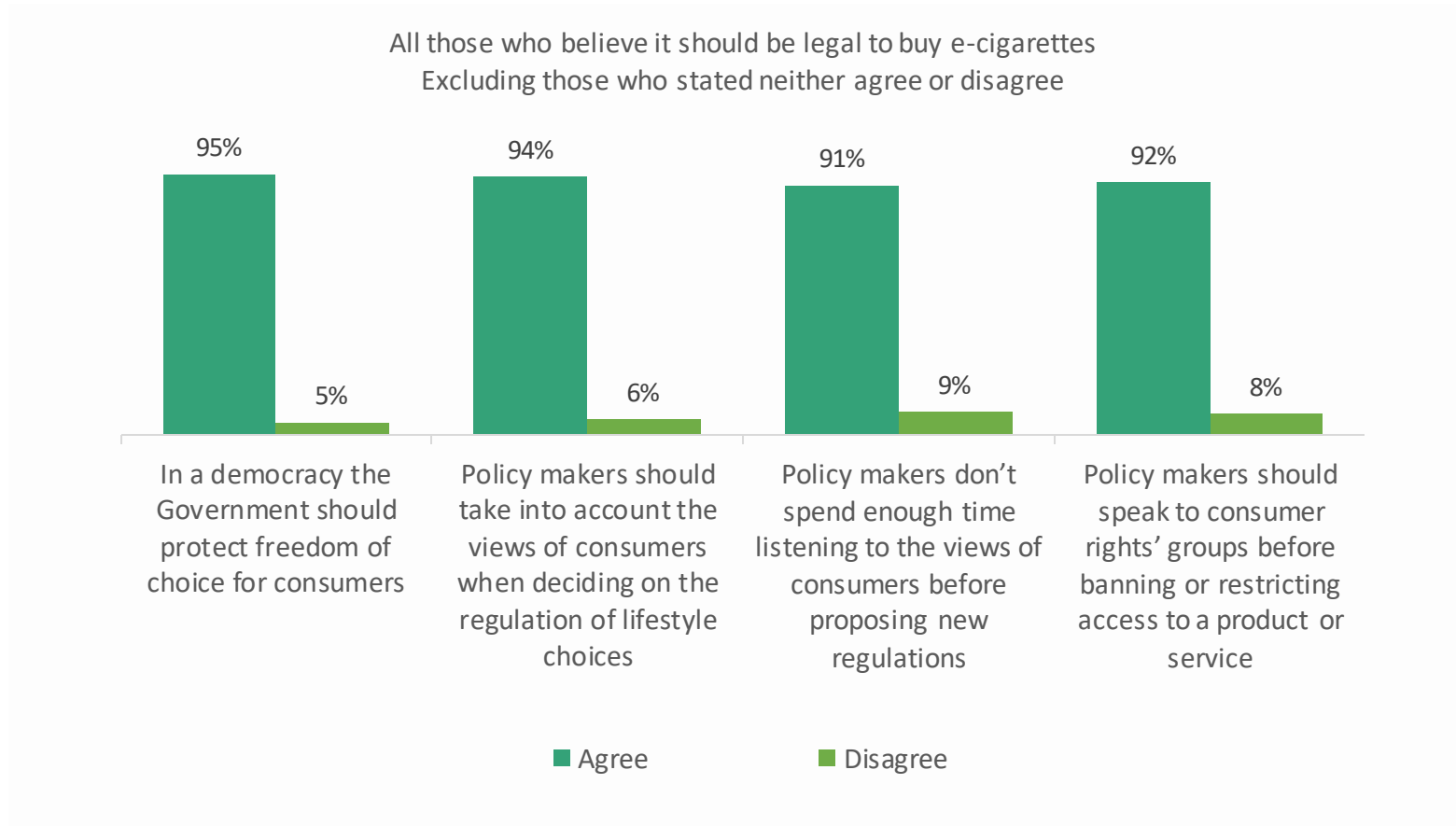
People should have the freedom of choice to buy e-cigarettes if they believe they are a lower health risk to them than tobacco

All adults who agree  
Excluding those who stated neither agree or disagree



# Those who agree that policy makers should listen to consumers/speak to consumer rights' groups and that a democratic governments role is to protect freedom of choice are more likely to agree that it should be legal to buy e-cigarettes

Taking what you've just read into account, to what extent do you agree or disagree with the following statements about e-cigarettes? - ... If it is legal to buy cigarettes and tobacco in a country, then it should also be legal to buy e-cigarettes



Base: Canada Those who agree if it is legal to buy cigarettes and tobacco in a country then it should also be legal to buy e-cigarettes (1150, 1130, 1079, 1071)