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Annex 14:

Summary of Consumer Evaluation Studies

Product	<i>Marlboro Amber HeatSticks</i> <i>Marlboro Green Menthol HeatSticks</i> <i>Marlboro Blue Menthol HeatSticks</i> <i>IQOS System Holder and Charger</i> <i>IQOS 3 System Holder and Charger</i>
FDA STN	PM0000424 - PM0000426, PM0000479 and PM0000634
Reporting Period	March 1, 2021 to February 28, 2022

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1. IQOS CONSUMER RESEARCH OVERVIEW

The Marketing Orders¹ require submission of an Annual Report with a summary of how the marketing of the tobacco products continues to be appropriate for the protection of public health, including summaries of two types of consumer research studies, as follows:

“A summary of all formative consumer research studies conducted – whether by you, on your behalf, or at your direction – among any audiences, in the formation of new labeling, advertising, marketing, and/or promotional materials, including qualitative and quantitative research studies used to determine message effectiveness, consumer knowledge, attitudes, beliefs, intentions and behaviors toward using the products, and including the findings of these studies and copies of the stimuli used in testing.”

“A summary of all consumer evaluation research studies conducted – whether by you, on your behalf, or at your direction – among any audiences, to determine the effectiveness of labeling, advertising, marketing and/or promotional materials and any shifts in consumer knowledge, attitudes, beliefs, intentions, and behaviors toward using the products, and including the findings of these studies and copies of the stimuli used in testing.”

We conducted consumer research studies during this Reporting Period that were not classified as formative or evaluative when conducted; yet, many study elements could be reasonably viewed as formative and evaluative based on the definitions provided in the Marketing Order. Therefore, rather than attempt to categorize the research studies we have provided a list of all consumer research studies responsive to the Marketing Orders and a summary of completed studies in this Annex.

In [Table 1](#), we have provided a list of the nine research studies carried out during this Reporting Period. This Annex includes a summary of each of those completed studies.

¹ This Annex is responsive to the April 30, 2019 Marketing Order for PM0000424-PM0000426 and PM0000479, and the December 7, 2020 Marketing Granted Order for PM0000634. We refer to both orders collectively here as the “Marketing Orders”.

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Table 1: *IQOS* Consumer Research

Study Name	Research Fielding Dates	Status
<i>IQOS</i> Owners/Purchaser Panel	01/01/2021 – 11/29/2021	Complete
<i>IQOS</i> Quality of Awareness Study	03/01/2021 – 10/30/2021	Complete
National Print Ad Study Round 2	01/14/2021	Complete
<i>IQOS</i> Perks Loyalty Program	03/08/2021 – 03/19/2021	Complete
<i>IQOS</i> Mobile Retail Infrastructure Behavioral Science Analysis	02/01/2021 – 02/03/2021	Complete
<i>IQOS</i> New Market Understanding Qualitative Study	04/05/2021 – 04/07/2021	Complete
<i>IQOS</i> Tobacco Alternatives Study 2021	04/26/2021 – 04/30/2021	Complete
<i>IQOS</i> Media Lift Study	08/30/2021 – 10/08/2021	Complete
<i>IQOS</i> Device Sales at Retail Study	09/17/2021 and 11/15/2021	Complete

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Study Name ***IQOS Owners/Purchaser Panel***

Principal Investigator (b) (4)
Altria Ventures, Inc.
Strategy & Consumer Marketplace Insights

Research Objective and Design

We launched the *IQOS* Consumer Panel in November 2019, and the objective of this quantitative study was to measure *IQOS* switching over time and understand perceptions, attitudes, drivers, and barriers to switching, in order to enhance the effectiveness of marketing activities.

(b) (4)

(b) (4)

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(b) (4)

Summary of Findings

(b) (4)

² (b) (4)

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(b) (4)

Stimuli Used in the Study

Figure 1: IQOS 2.4 Device



³ On Sept. 29 the International Trade Commission (ITC) issued an order imposing an importation ban on the IQOS device and Marlboro HeatSticks into the U.S., and cease-and-desist orders (CDOs) on the marketing and sale of product already imported into the U.S. In compliance with this ruling, IQOS and Marlboro HeatSticks products and marketing materials were removed from retail beginning Nov. 1 and completed by Nov. 19.

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Figure 2: IQOS 3.0 Device



Figure 3: Marlboro HeatSticks



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Study Name ***IQOS Quality of Awareness Study***

Principal Investigator (b) (4)
Altria Ventures, Inc.
Strategy & Consumer Marketplace Insights

Research Objective and Design

The objective of this quantitative study was to continue tracking the level of awareness and understanding of *IQOS* devices and *HeatSticks* over time among adult smokers 21 years of age or older (AS 21+).

This cross-sectional study (b) (4) among a nationally representative sample of AS 21+ with an augmented sample of participants in Atlanta, Georgia; Richmond, Virginia; Northern Virginia, and Charlotte, North Carolina. (b) (4)

This study analyzed *IQOS* awareness in 5 waves (waves 7-11) in 2021 as outlined in [Table 2](#).

Table 2: Quality of Awareness Field Dates and Number of Participants per Wave

Wave	Date	Participants (Atlanta)	Participants (Richmond)	Participants (Charlotte)	Participants (Northern Virginia)	Participants (Other US)
7	March 2021	(b) (4)				
8	June 2021					
9	August 2021					
10	September 2021					
11	October 2021					

⁴ The prior waves were conducted in 2020 and included in the April 30th, 2021 *IQOS* Annual Report with the following study name: 'IQOS Quality of Awareness, Wave 3-6.'

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Summary of Findings

(b) (4)

[REDACTED]

[REDACTED]

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Stimuli Used in the Study

Figure 4: IQOS 2.4 and 3.0 Devices and Marlboro HeatSticks



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Study Name **National Print Ad Study Round 2**

Principal Investigator (b) (4)
Altria Ventures, Inc.
Strategy & Consumer Marketplace Insights

Research Objective and Design

The objective of this study was to understand which potential *IQOS* print advertisement would resonate most with adult smokers 21 years of age or older (AS 21+). In this second round of research,⁵ our goals were to evaluate new national print advertising featuring the MRTP claim as well as new headlines and visuals. Further, we wanted to understand which ad more clearly and effectively captured the characteristics of *IQOS* and its relevance to AS 21+.

(b) (4)

Summary of Findings

(b) (4)

⁵ The ‘*IQOS* National Print Advertisement Study’ was conducted in October 2020 and included within the April 30th, 2021 *IQOS* Annual Report. The prior round of research adopted a similar methodology while testing different print ad stimuli.

⁶ As with all qualitative research, the findings from this study are not necessarily representative of, or projectable to, the larger U.S. population of adult smokers, ages 21+. These findings are considered directional and intended for hypothesis generation or strengthening only.

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(b) (4)



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Stimuli Used in the Study⁷

Figure 5a: (b) (4)

(b) (4)



⁷ Concepts not for actual market use; used for exploration purposes only.

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Figure 5b: (b) (4) ,

(b) (4)



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Study Name ***IQOS Perks Loyalty Program***

Principal Investigator (b) (4)
Altria Ventures, Inc.
Strategy & Consumer Marketplace Insights

Research Objective and Design

The objective of this qualitative⁸ study was to understand how adult smokers 21 years of age or older (AS 21+) interact with the *IQOS* Perks program, and the impact of the *IQOS* Perks program on their process towards switching to *IQOS*.

The *IQOS* Perks program was developed to allow adult smokers 21 years of age or older (AS 21+) to register through their rewards profile and earn points for each code found on a pack of *HeatSticks*. This study was intended to help better understand the current strengths of the program and identify any potential opportunities to increase participation.

(b) (4)

Summary of Findings

(b) (4)

⁸ As with all qualitative research, the findings from this study are not necessarily representative of, or projectable to, the larger U.S. population of adult smokers, ages 21+. These findings are considered directional and intended for hypothesis generation or strengthening only.

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(b) (4)



Stimuli Used in the Study⁹

Figure 6: (b) (4)

(b) (4)



⁹ Concepts not for actual market use; used for exploration purposes only.

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(b) (4)



(b) (4)



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Study Name ***IQOS Mobile Retail Infrastructure Behavioral Science Analysis***

Principal Investigator (b) (4)
Altria Ventures, Inc.
Strategy & Consumer Marketplace Insights

Research Objective and Design

The objective of this qualitative¹⁰ research was to understand how to better drive *IQOS* trial and purchase among adult smokers 21 years of age or older (AS 21+) in 3rd party retail and mobile retail infrastructure. Primary research objectives included uncovering potential barriers and motivators for AS 21+ engagement with mobile retail pods or corners, to identify tools and strategies that might foster awareness and drive engagement.

(b) (4)

Summary of Findings

(b) (4)

¹⁰ As with all qualitative research, the findings from this study are not necessarily representative of, or projectable to, the larger U.S. population of adult smokers, ages 21+. These findings are considered directional and intended for hypothesis generation or strengthening only.

¹¹ (b) (4)

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(b) (4)



(b) (4)



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Stimuli Used in the Study¹²

Figure 7: (b) (4)



¹² Concepts not for actual market use; used for exploration purposes only.

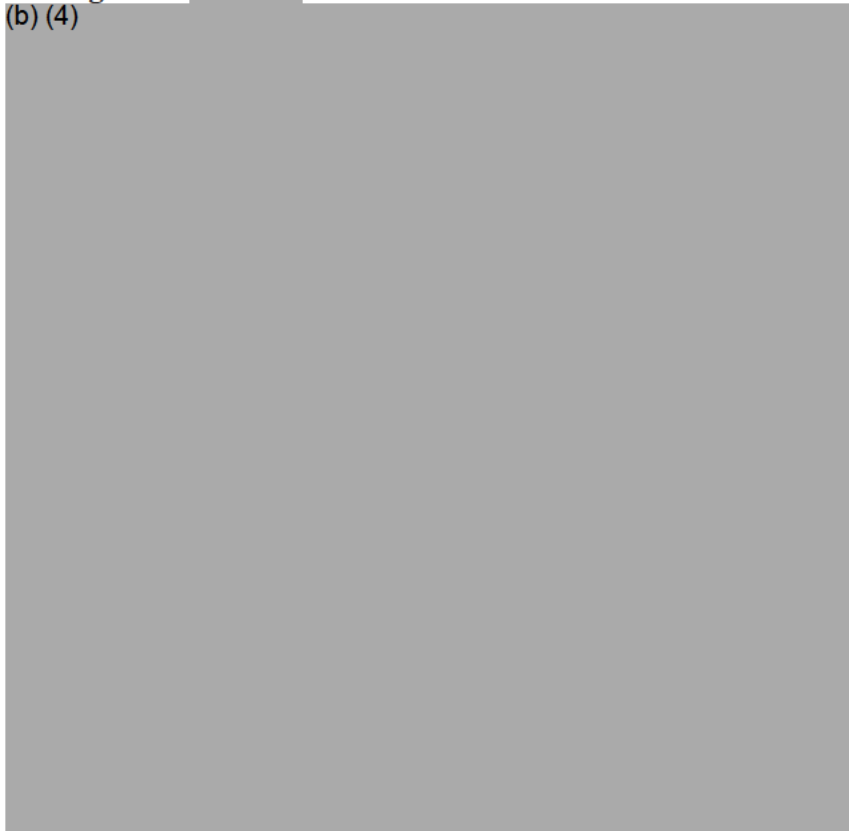
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Figure 8: (b) (4)

(b) (4)



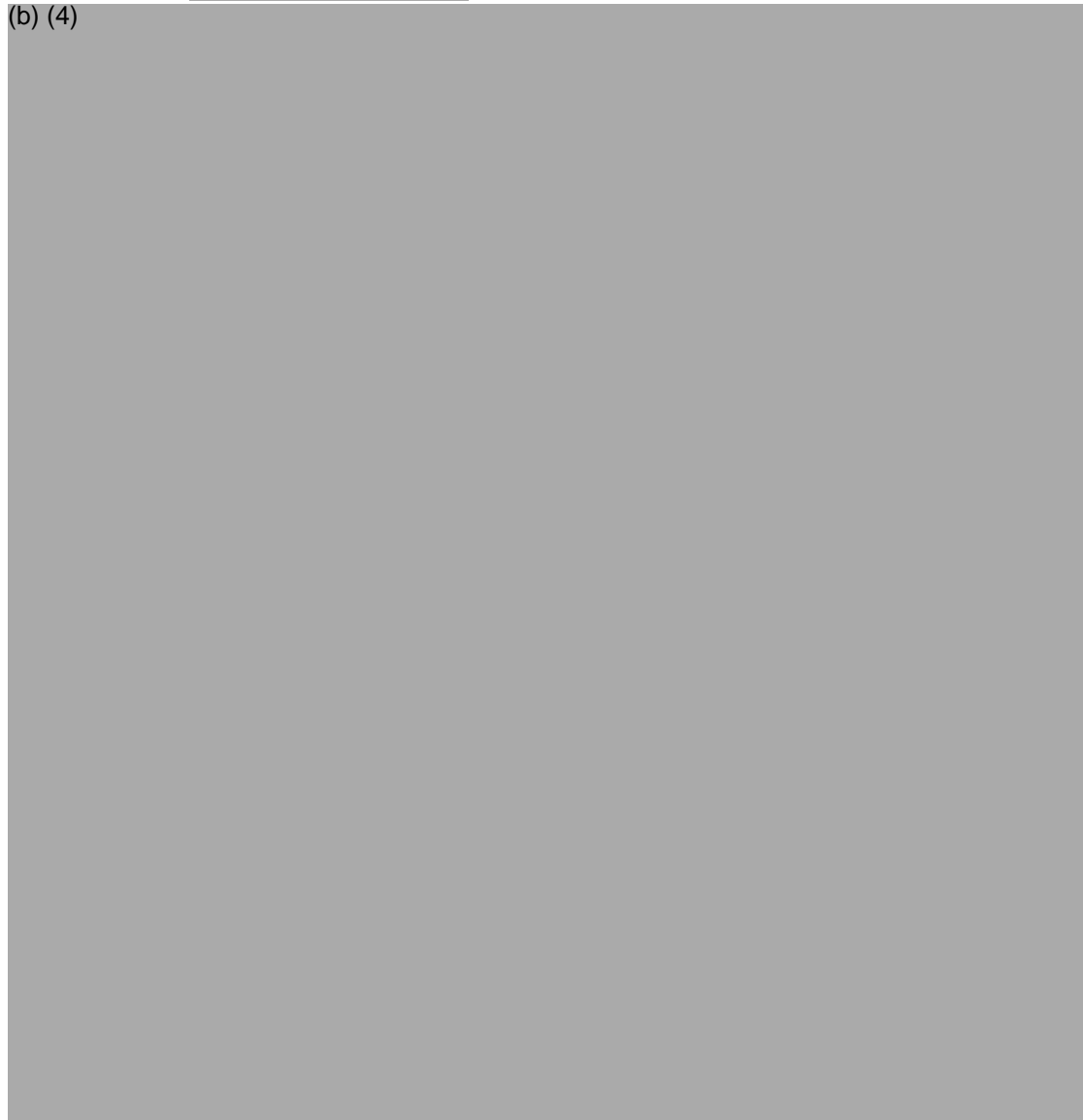
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Figure 9: (b) (4)

(b) (4)



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Figure 10: (b) (4)

(b) (4)



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Study Name ***IQOS New Market Understanding Qualitative Study***

Principal Investigator (b) (4)

Altria Ventures, Inc.

Strategy & Consumer Marketplace Insights

Research Objective and Design

The objective of this qualitative¹³ study was to identify strategies that may guide PMUSA's approach for communicating to adult smokers 21 years of age or older (AS 21+), in order to effectively increase their understanding of *IQOS*. Findings were meant to inform the messaging used in expansion markets, including digital (Web ads and Email) and point of sale (POS).

(b) (4)

■ [Redacted]

■ [Redacted]

■ [Redacted]

[Redacted]

¹³ As with all qualitative research, the findings from this study are not necessarily representative of, or projectable to, the larger U.S. population of adult smokers, ages 21+. These findings are considered directional and intended for hypothesis generation or strengthening only.

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(b) (4)

Summary of Findings

(b) (4)

¹⁴ (b) (4)

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(b) (4)



¹⁵ (b) (4)

¹⁶ (b) (4)

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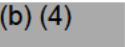
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(b) (4)



Stimuli Used in in the Study¹⁷

Figure 11: (b) (4)



(b) (4)



(b) (4)



¹⁷ Concepts not for actual market use; used for exploration purposes only.

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(b) (4)

(b) (4)

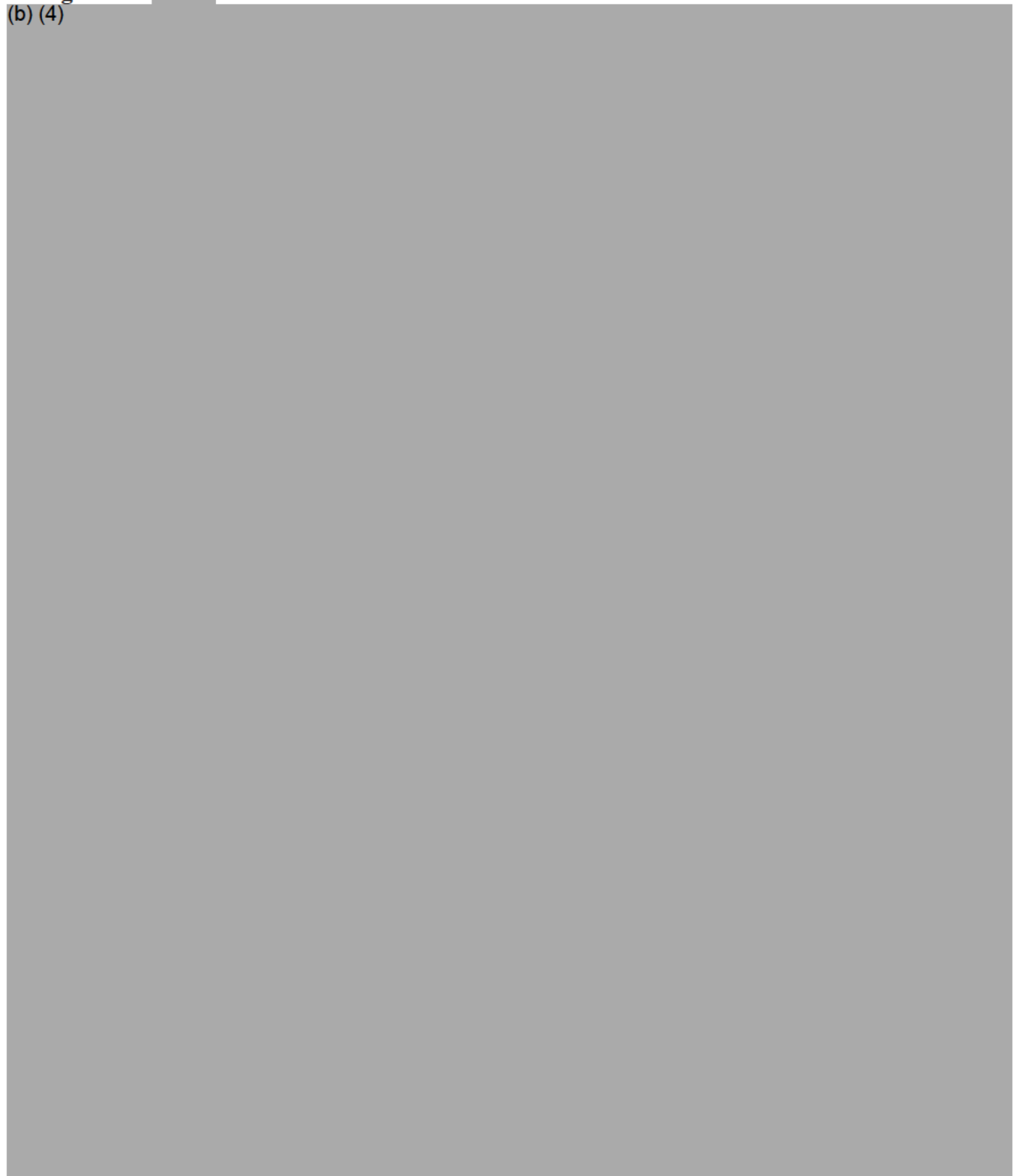
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Figure 12: (b) (4)

(b) (4)



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(b) (4)



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Figure 13: (b) (4)

(b) (4)



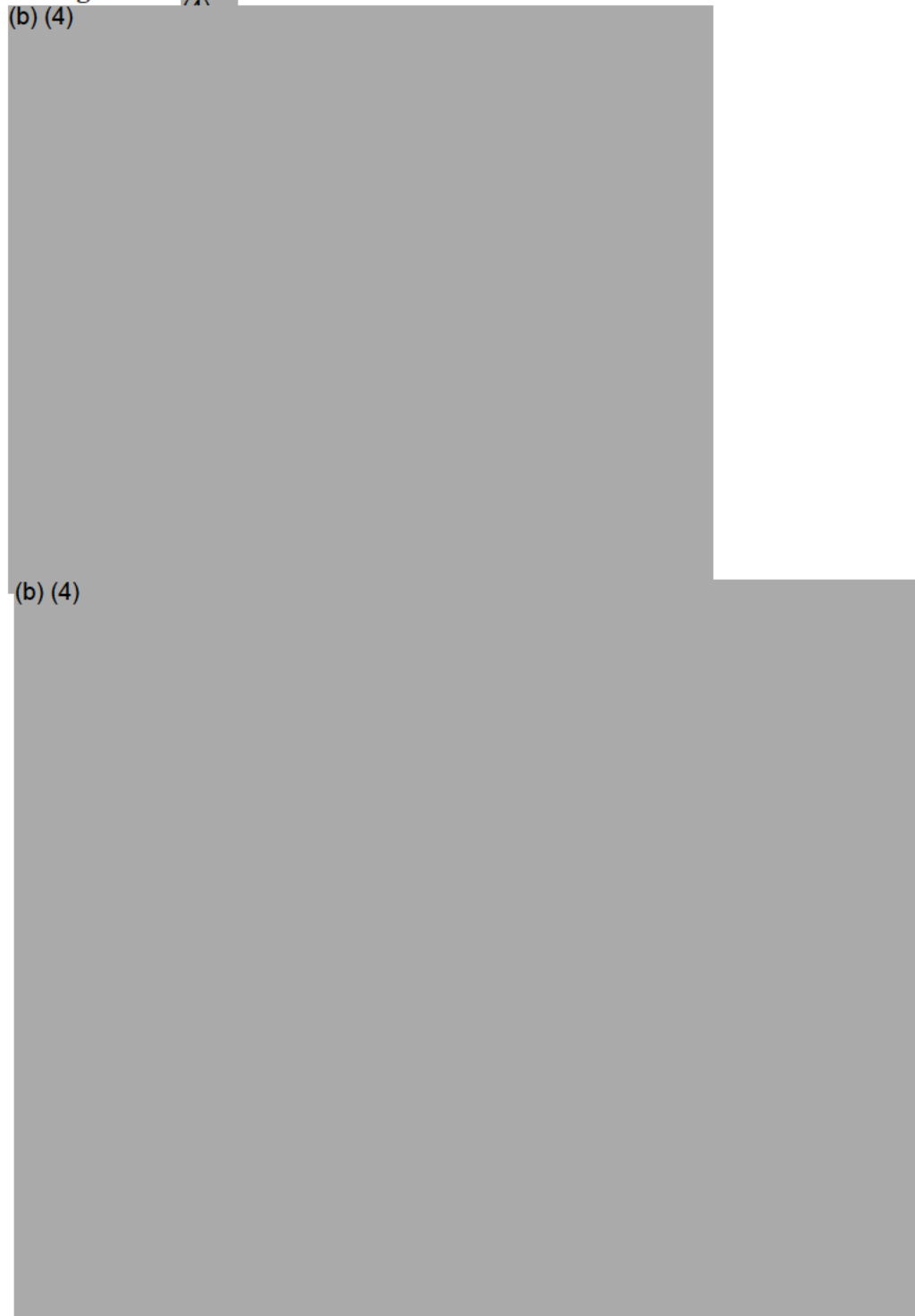
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Figure 14: (b)

(b) (4)



(b) (4)

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(b) (4)



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Study Name ***IQOS Tobacco Alternatives Study 2021***

Principal Investigator (b) (4)
Altria Ventures, Inc.
Strategy & Consumer Marketplace Insights

Research Objective and Design

The objective of this quantitative study was to guide *IQOS* expansion strategies by understanding adult smokers 21 years of age or older (AS 21+) openness to non-combustible tobacco product alternatives when compared to conventional cigarettes across different markets¹⁸ in the U.S.

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Summary of Findings

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¹⁸ Defined by metropolitan statistical area (MSA)

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Stimuli Used in the Study

None.

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Study Name ***IQOS Media Lift Study***

Principal Investigator (b) (4)

Altria Ventures, Inc.

Strategy & Consumer Marketplace Insights

Research Objective and Design

The purpose of this quantitative study was to explore the impact of *IQOS* digital media among adult smokers 21 years of age or older (AS 21+) on key metrics as it relates to awareness and messaging.

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The research design sought to measure the difference in attitudes between these two groups of AS 21+ and determine the attitudinal effects of advertising exposure.

Summary of Findings

The results of this study revealed that metric and attribute results remained stable and are comparable after exposure to the *IQOS* campaign, suggesting no significant media lift for *IQOS* digital media ads. Compared with market norms of past 3-year brands introduced in the US market, Aided Brand Awareness,¹⁹ Online Ad Awareness,²⁰ Brand Favorability,²¹ Search Intent,²² and Consideration²³ metrics were higher in this study's control group, making growth or lifts more challenging for this study's exposed group.

¹⁹ (b) (4)

²⁰ (b) (4)

²¹ (b) (4)

²² (b) (4)

²³ (b) (4)

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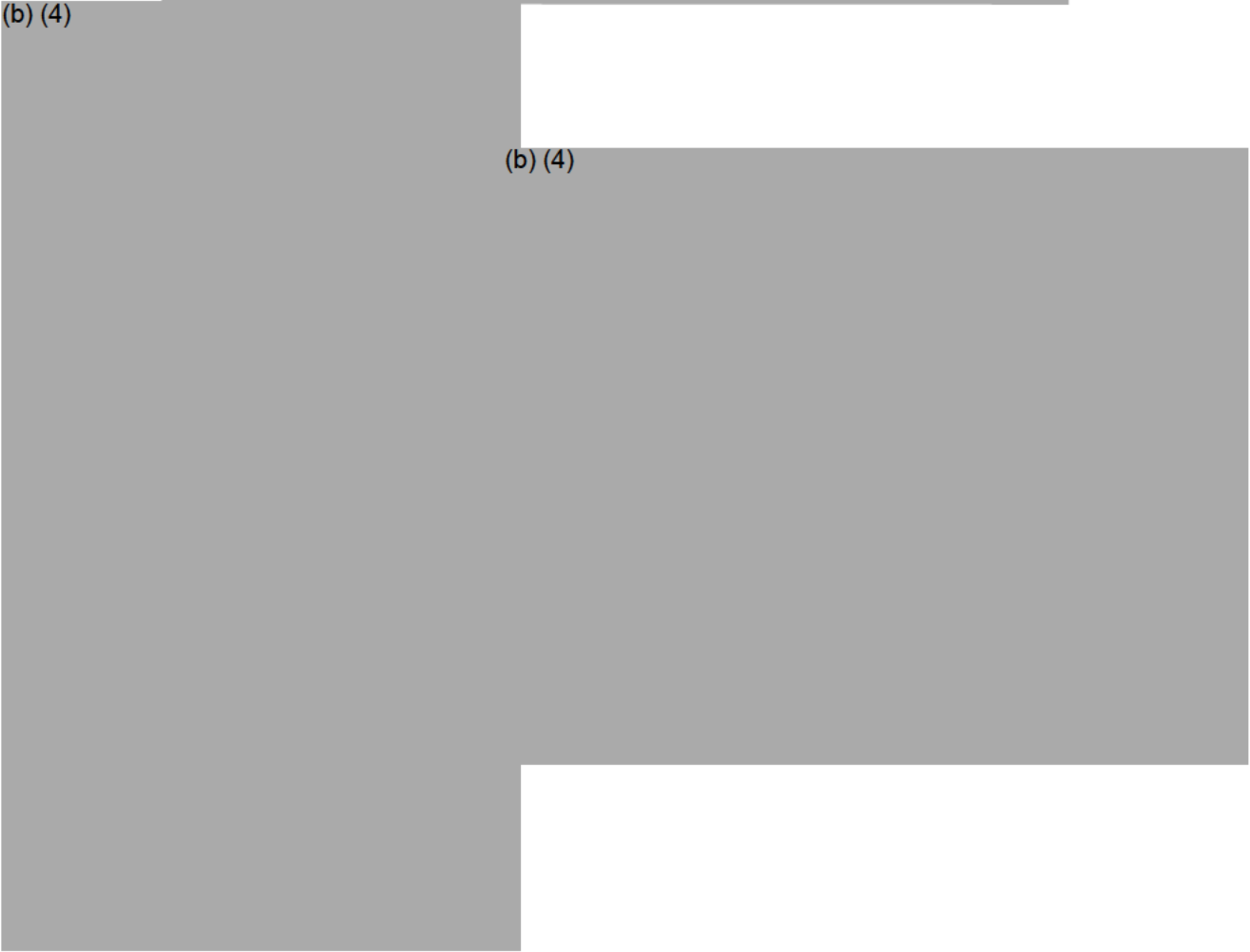
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Stimuli Used in the Study²⁴

Figure 15: (b) (4)



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Study Name ***IQOS Device Sales at Retail Study***

Principal Investigator (b) (4)
Altria Ventures, Inc.
Strategy & Consumer Marketplace Insights

Research Objective and Design

This qualitative²⁵ study encompassed two phases of research: the first phase was a deep dive into adult smokers' age 21 years or older (AS 21+) experience purchasing an *IQOS* device in a retail or convenience store setting. The objective in this first phase was to explore the purchase experience at retail and to understand unmet needs through the purchasing process.

The second phase was centered around the *IQOS* device registration process post retail purchase. The objective of this second phase of research was to understand the challenges experienced during the registration process from the perspective of an AS 21+ purchasing *IQOS* at a convenience store, and to explore opportunities to bridge those gaps through the optimization of marketing material associated with registration. Stimuli used in the study are shown in [Figures 16-18](#).

(b) (4)

Summary of Findings

(b) (4)

²⁵ As with all qualitative research, the findings from this study are not necessarily representative of, or projectable to, the larger U.S. population of adult smokers, ages 21+. These findings are considered directional and intended for hypothesis generation or strengthening only.

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[REDACTED]

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Stimuli Used in the Study²⁶

Figure 16: (b) (4)



²⁶ Concepts not for actual market use; used for exploration purposes only.

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Figure 17: (b) (4)

(b) (4)



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Figure 18: (b) (4)
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