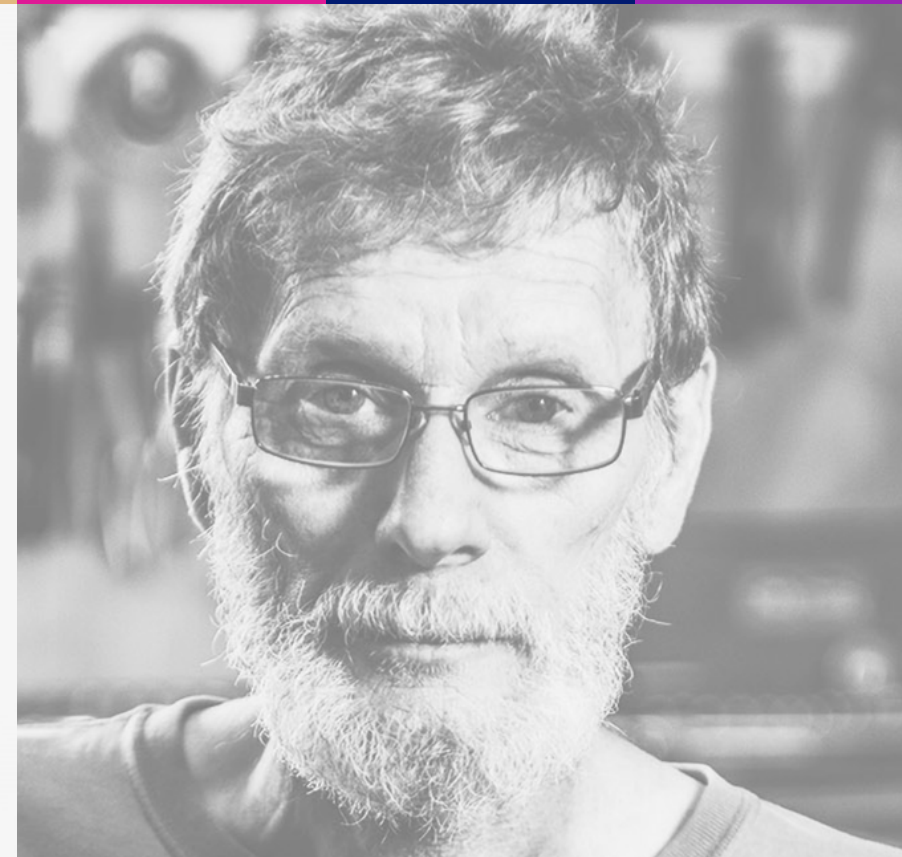




The State of Smoking 2018

Global Survey Findings and Insights

Monday, March 19, 2018





FOUNDATION FOR A
SMOKE-FREE WORLD

WELCOME





Dr. Derek Yach

President, Foundation for a Smoke-Free World



Support and Disclaimer


The survey was conducted by Kantar Public, an integrated consulting and research agency, which was engaged by the Foundation for a Smoke-Free World, Inc. The Foundation is an independent, private foundation formed and operated free from the control or influence of any third party. Philip Morris International, S.A. has provided the initial funding to the Foundation. The Foundation makes grants and supports medical, agricultural, and scientific research to end smoking and its health effects and to address the impact of reduced worldwide demand for tobacco.

Why Focus on the Smoker?

The experience of smoking is multifaceted and deeply personal. Therefore, the solutions we offer have to reflect an understanding of that experience, what smokers need, and what they want as they try to quit.



Purpose of the Survey

- 
1. Understand smokers' experiences and challenges
 2. Probe awareness of smoking and health impacts
 3. Assess perceptions of risk and influence on choices

Methodology

Quantitative: Global Survey

- More than 17,000 participants
- 13 countries
- 7 languages
- Representative of general population 18+ years old
- 3 profiles: smokers, ex-smokers, non-smokers

Qualitative: Focus Groups

- Major cities in 7 of the 13 countries
- Smokers who tried to quit at least once
- Ex-smokers
- Providing additional context and insights

Read the full methodological report at SmokeFreeWorld.org

Smoking Prevalence by Country & Gender

Country	State of Smoking 2018 Global Poll		WHO (2015)	
	Male (≥18 years) (Main sample)	Female (≥18 years) (Main sample)	Men (≥15 years)	Women (≥15 years)
Brazil	11%	7.2%	19.3%	11.3%
France	31.5%	29.6%	29.8%	25.6%
Greece	37.9%	31.4%	52.6%	32.7%
Israel	22.2%	11.9%	41.2%	19.3%
India	17.1%	1%	20.4%	1.9%
Japan	25.9%	19.5%	33.7%	10.6%
Lebanon	57.5%	48.4%	45.4%	31%
Malawi	15.6%	4.4%	25.4%	6%
New Zealand	8.4%	6.1%	-	-
Russia	39.1%	16.7%	59%	22.8%
South Africa	49%	34.1%	31.4%	6.5%
United Kingdom	26.3%	15.9%	19.9%	18.4%
United States	26%	11.3%	19.5%	15%

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Findings and Insights



Understand Smokers' Experiences and Challenges

Smoking is deeply integrated into most smokers' daily lives, so quitting means more to them than just giving up cigarettes.



Smokers' Experiences and Challenges

Focus groups

Physical

- Intense need/craving
- Hard to concentrate
- Insomnia
- Weight gain



Behavioral

- Habit
- Ritual: routines
(with coffee, in car...)
- Have something in hand
- Social, going out w/ friends



Emotional

- Pleasure
- Calms stress/anger/anxiety
- Irritable when not smoking
- Inclusion w/ other smokers
- Helps w/ boredom

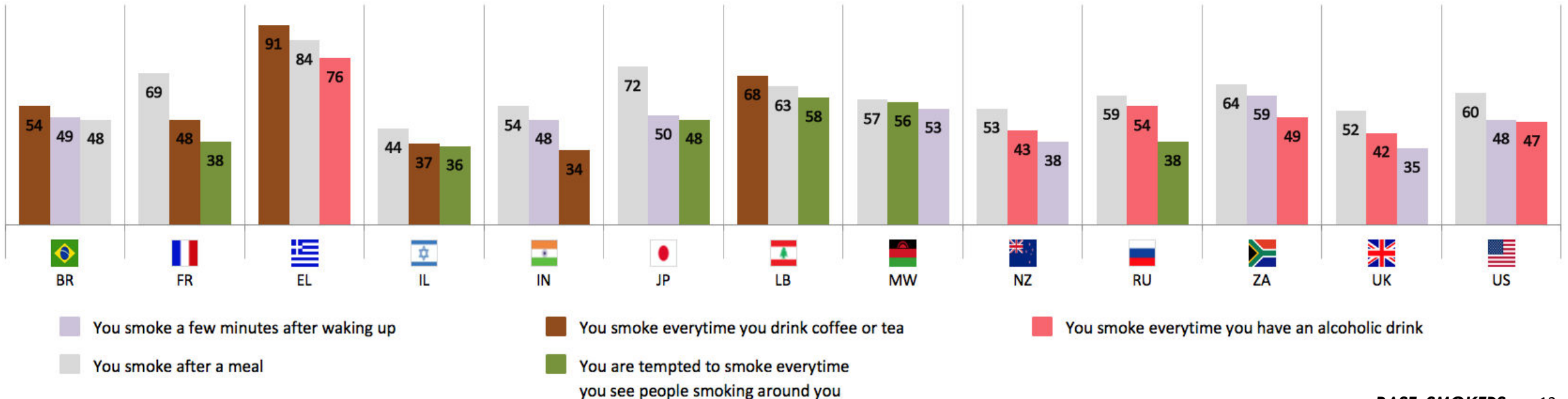
Smoking isn't just a physical addiction for smokers, it's also a deeply engrained behavioral, emotional, and social part of their lives

Smokers' Experiences and Challenges

Smoking is a big part of many smokers' daily rituals and routines

Which of the following situations, if any, apply to you?
(Multiple answers possible)

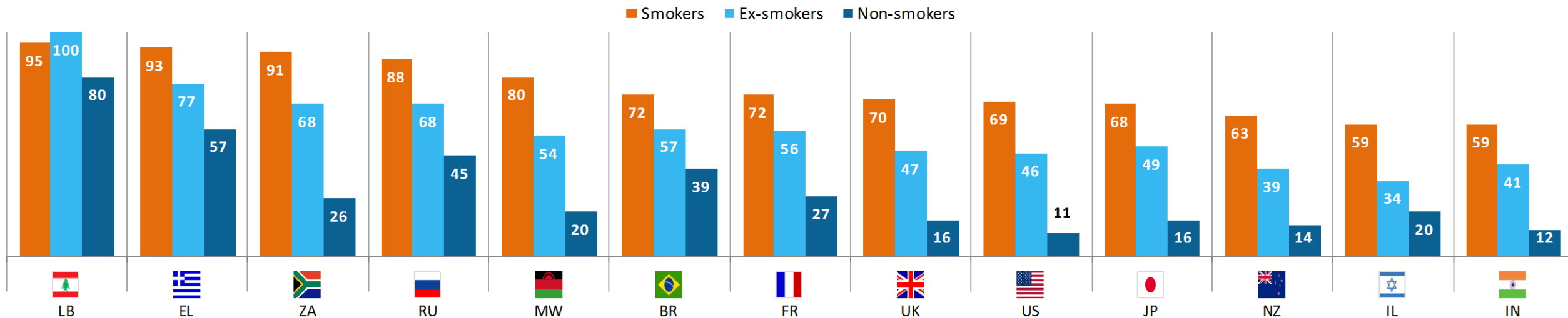
(%, TOP THREE ANSWERS PER COUNTRY)



Smokers' Experiences and Challenges

Smokers tend to have close friends who smoke

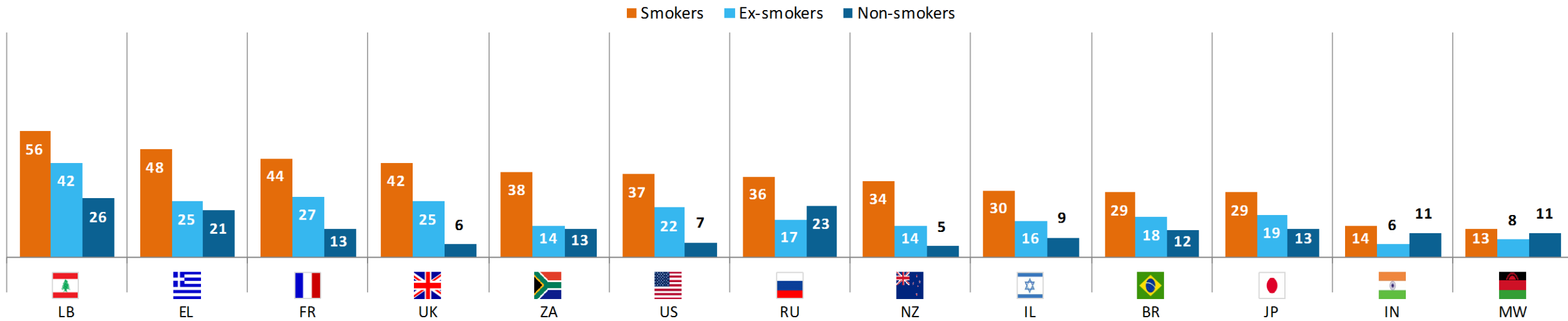
Which of the following applies to you?
Your closest friends smoke
(%, APPLIES TO YOU)



Smokers' Experiences and Challenges

Smokers are more likely to have partners/spouses who smoke

Which of the following applies to you?
Your partner/spouse smokes
(%, APPLIES TO YOU)



BASE: ALL

Probing Global Awareness of Smoking and Health Impacts

Smokers know smoking is harmful and addictive and consider themselves in poorer health than non-smokers – yet they're not as actively engaged with their doctors as non-smokers.

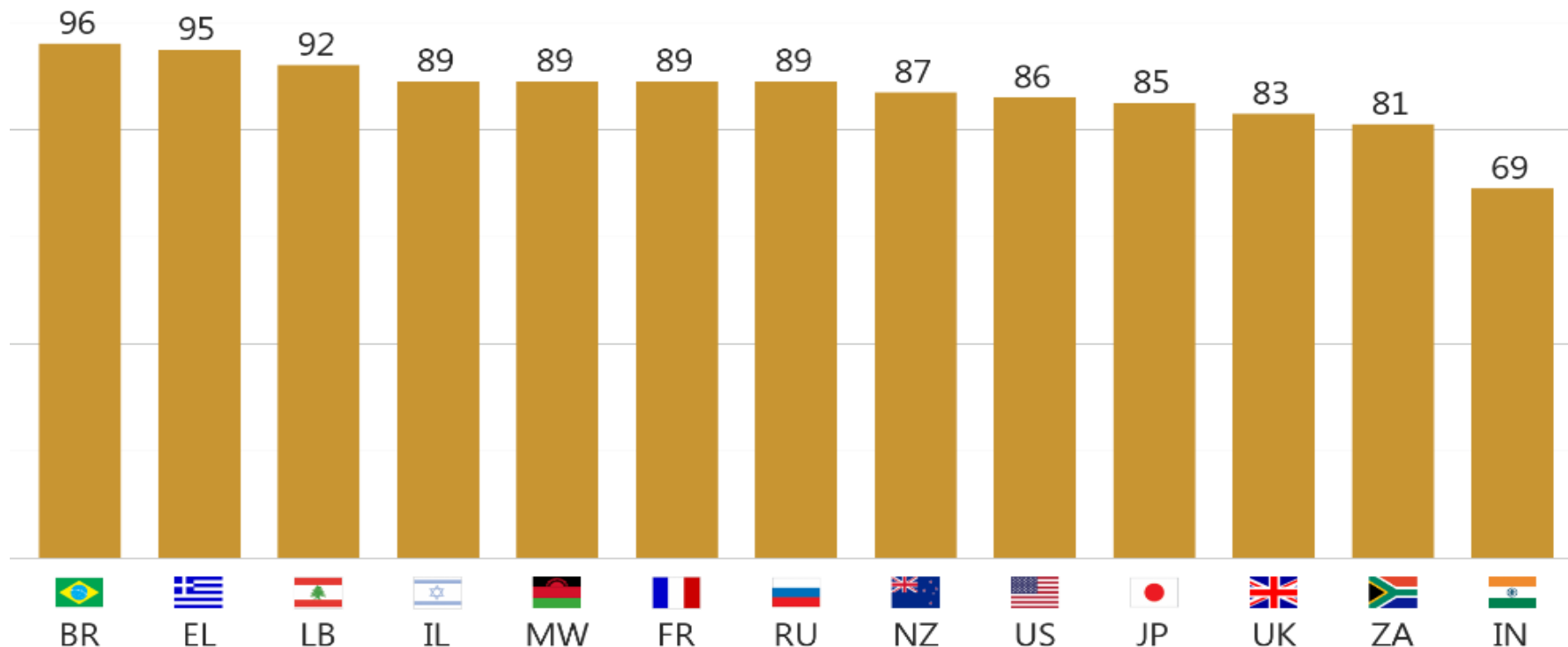


Smoking and Health: Awareness of Harm

Most smokers know smoking is harmful to their health

To what extent do you agree or disagree with the following statements?
Your smoking is harmful for your health

(%, TOTAL "AGREE")



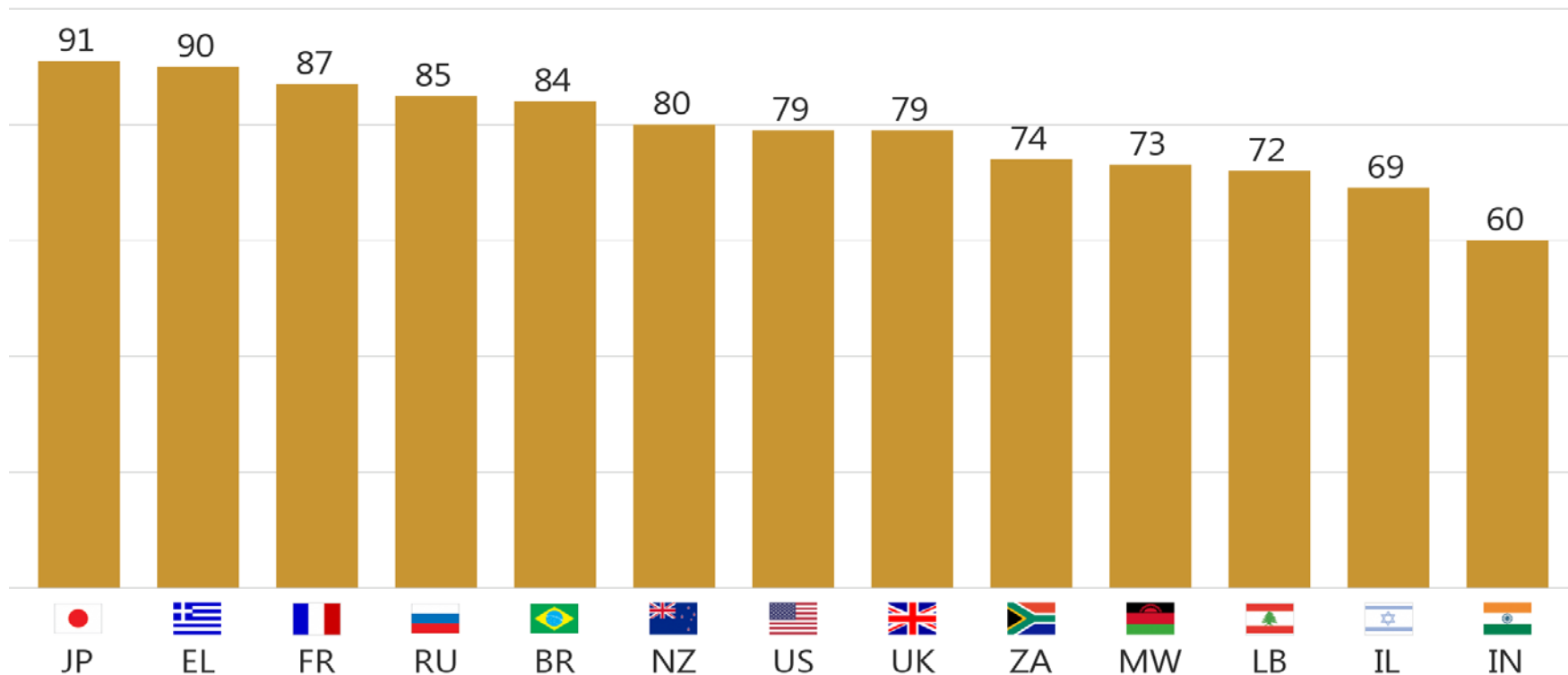
BASE: SMOKERS

Smoking and Health: Awareness of “Addiction”

Most smokers also consider themselves addicted to cigarettes

Do you consider yourself addicted to cigarettes?

(%, TOTAL “ADDICTED”)



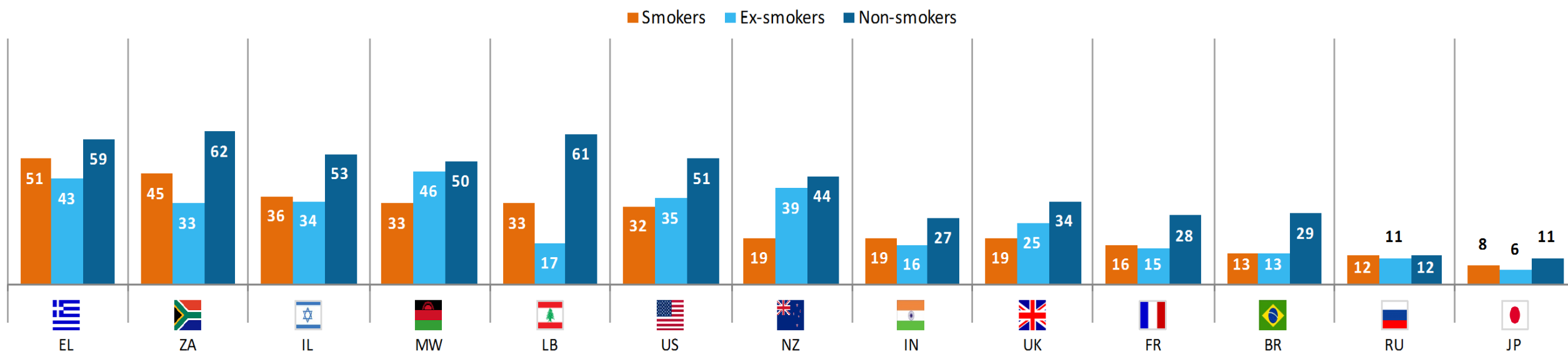
BASE: SMOKERS

Smoking and Health: Perception of Personal Health

Smokers don't think they are as healthy as non-smokers

In general, how would you describe your health? Is it...

(%, TOTAL "EXCELLENT/VERY GOOD")

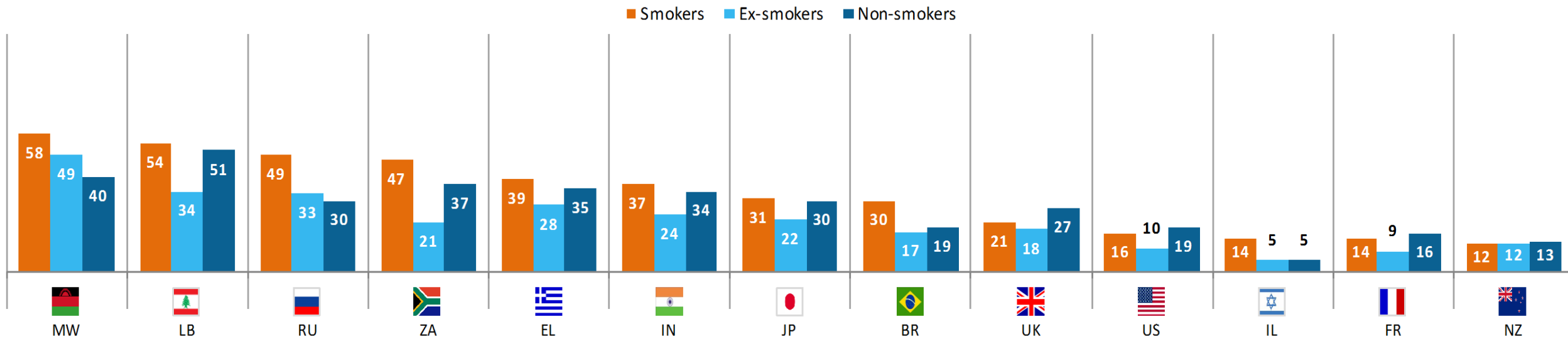


Smoking and Health: Interaction w/ Healthcare Providers

Despite smokers' concerns about their health, they don't engage with their healthcare providers as frequently as non-smokers

How many times did you visit a doctor or a healthcare provider in the last 12 months?

(%, "NEVER")



Assessing Perceptions of Risk and Influence on Choices

There is significant confusion among smokers about relative harms of smoking and less harmful alternatives. Misconceptions impact their motivations and choices about best pathways to quit or switch to reduced harm products.

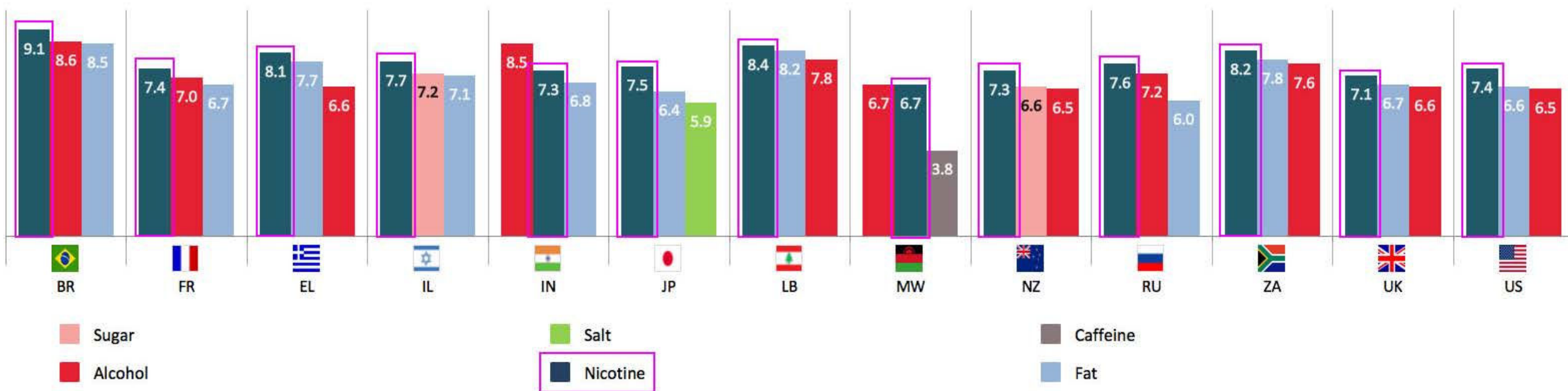


Perceptions of Risk: Nicotine as a Substance

Smokers generally view nicotine as a harmful substance

And using the same scale, to what extent do you think a moderate daily use of the following substances can harm your health?

(%, TOP THREE ANSWERS PER COUNTRY)



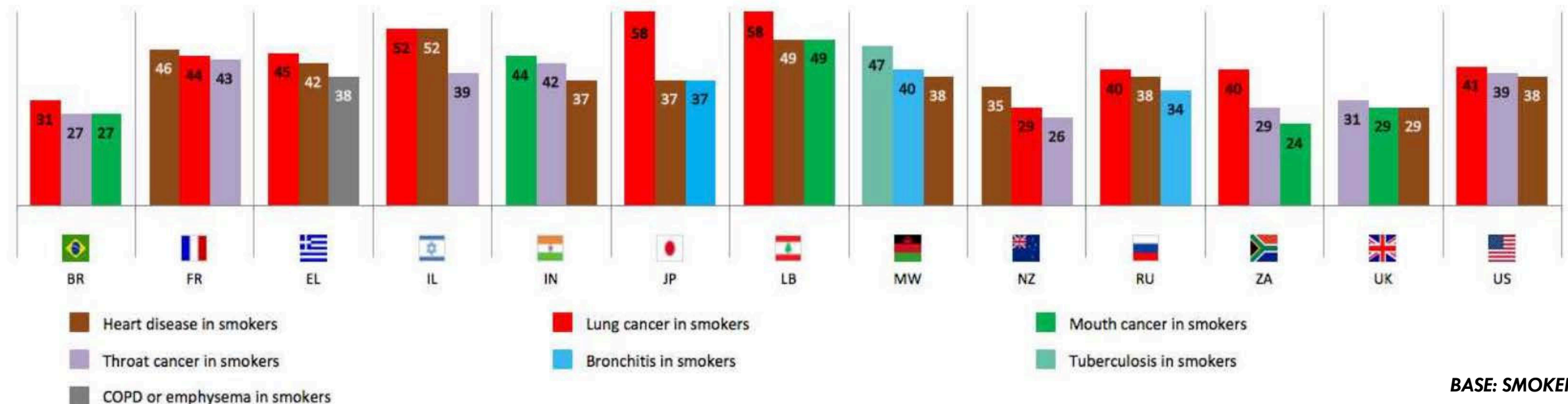
BASE: SMOKERS

Perceptions of Risk: Nicotine and Cancer

Many smokers believe nicotine in e-cigarettes causes cancer

Based on what you know or believe, does smoking nicotine in products like electronic cigarettes cause...
(Multiple answers possible)

(%, TOP THREE ANSWERS PER COUNTRY – SMOKERS)



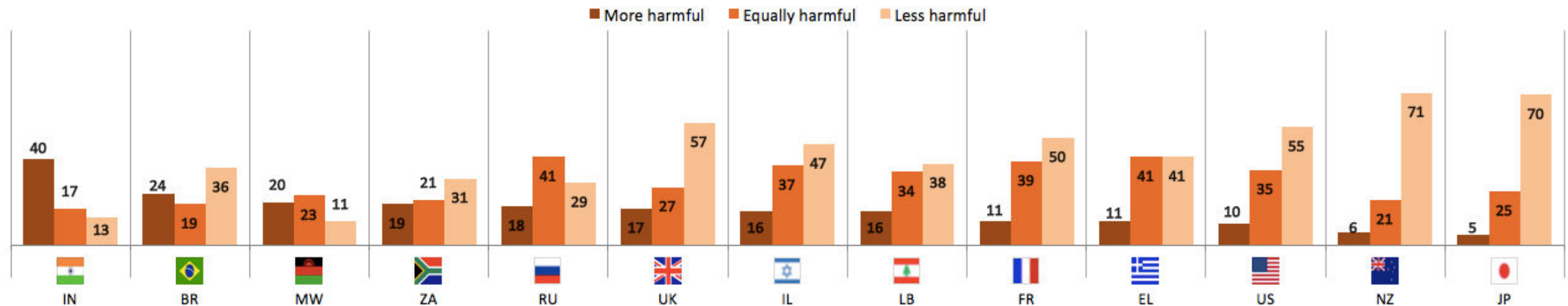
BASE: SMOKERS

Perceptions of Risk: E-cigs vs. Combustible Cigarettes

In some countries, e-cigarettes ranked as or more harmful than smoking

Do you think smoking e-cigarettes and vaping devices is more or less harmful than smoking regular cigarettes?

(%, SMOKERS)



BASE: SMOKERS

Perceptions and Choices: Methods Used to (Try to) Quit

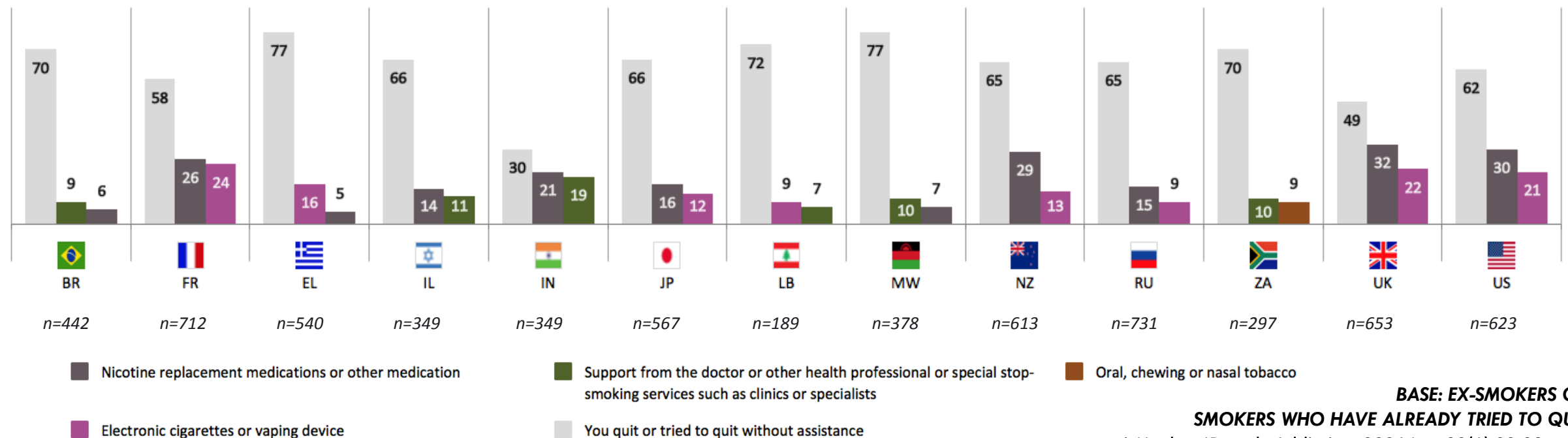
Smokers often try to quit without assistance

*(various studies indicate success rates for smokers trying to quit on their own is <10%)**

Which of the following did you use in order to quit or to try to quit smoking?

(Multiple answers possible)

(%, TOP THREE ANSWERS PER COUNTRY)



BASE: EX-SMOKERS OR

SMOKERS WHO HAVE ALREADY TRIED TO QUIT

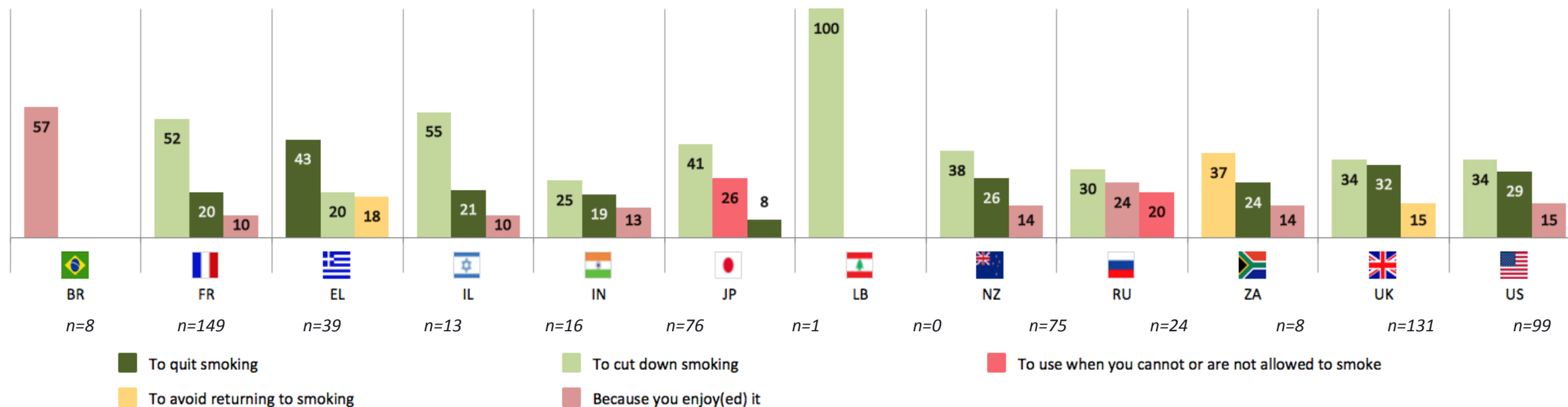
* Hughes JR et al., Addiction. 2004 Jan; 99(1):29-38.

Perceptions and Choices: Use of E-cigs/Vaping

Smokers in some markets are beginning to use e-cigarettes/vaping to reduce smoking or quit

What is your primary reason for using an e-cigarette or vaping device?

(%, TOP THREE ANSWERS PER COUNTRY)



Note: the sample size of e-cigarettes/vaping devices users is too small in Brazil, Israel, India, Lebanon, Malawi, Russia, and South Africa to present valid results

To Help Smokers Quit or Reduce Their Risk, We Will...

Define and broaden awareness of the unique experiences and struggles of smokers and what support they really need

Catalyze the development of more effective tools, resources, and interventions to empower health professionals

Generate evidence to help provide guidance and education on the relative risk of cigarettes vs. reduced-harm products

Support innovation that expands the range of effective reduced-harm products that pave the way toward smoking cessation

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