



COVID-19 STATE OF SMOKING POLL

FOUNDATION FOR A
SMOKE-FREE WORLD

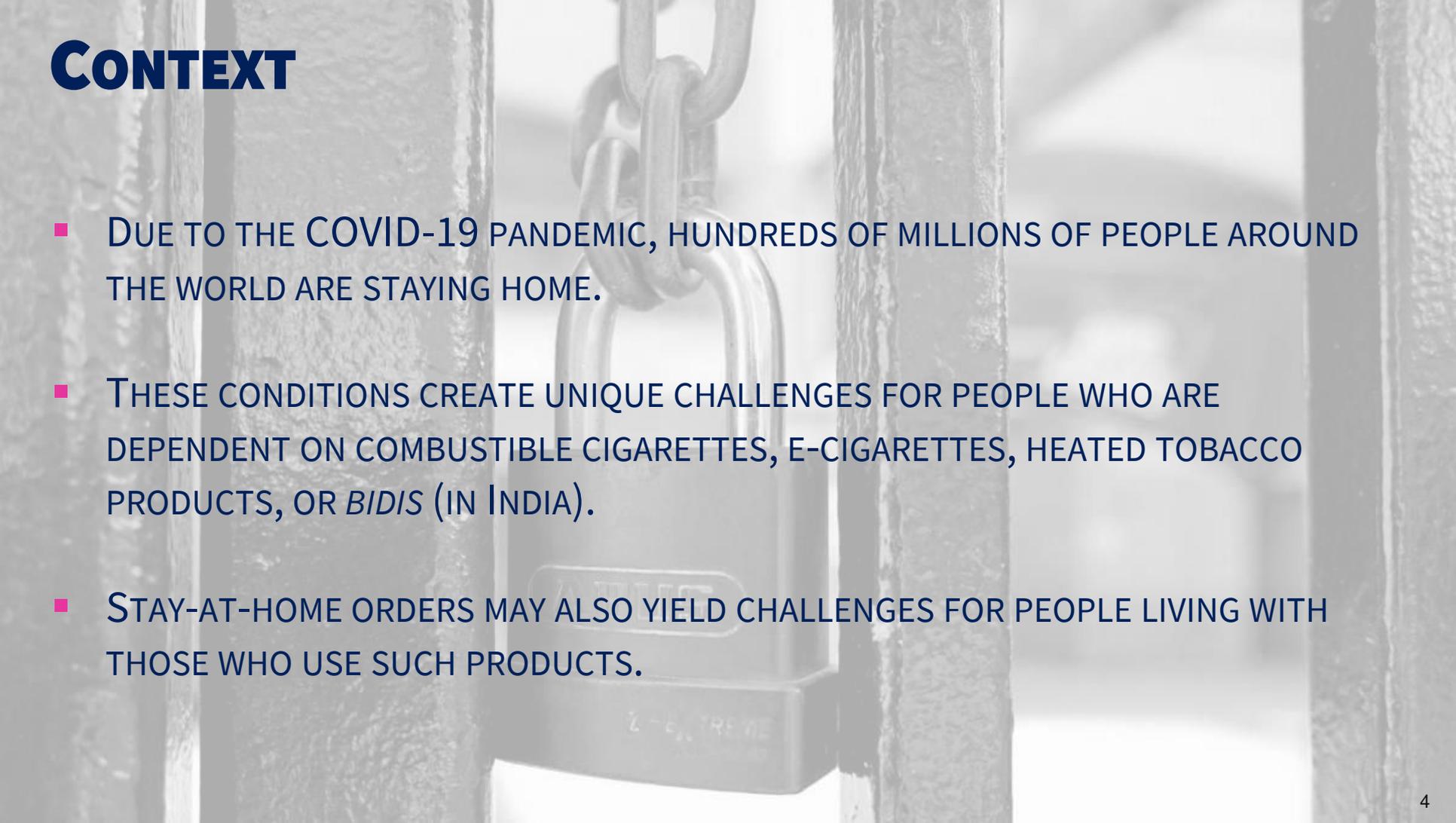


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I. BACKGROUND

CONTEXT

A grayscale background image showing a metal padlock on a chain, attached to a metal bar. The padlock is a standard combination padlock with a keyhole. The chain is made of several links. The metal bar is part of a larger structure, possibly a door or gate. The background is blurred, suggesting an outdoor setting.

- DUE TO THE COVID-19 PANDEMIC, HUNDREDS OF MILLIONS OF PEOPLE AROUND THE WORLD ARE STAYING HOME.
- THESE CONDITIONS CREATE UNIQUE CHALLENGES FOR PEOPLE WHO ARE DEPENDENT ON COMBUSTIBLE CIGARETTES, E-CIGARETTES, HEATED TOBACCO PRODUCTS, OR *BIDIS* (IN INDIA).
- STAY-AT-HOME ORDERS MAY ALSO YIELD CHALLENGES FOR PEOPLE LIVING WITH THOSE WHO USE SUCH PRODUCTS.

CONTEXT

Early reports suggest a nuanced relationship between the lockdown and nicotine/ tobacco use . . .

Sharon Cox: Risky smoking practices and the coronavirus: A deadly mix for our most vulnerable smokers

March 20, 2020



European Smokers, Vapers Still Get Their Fix During Lockdowns

By Corinne Gretler

March 17, 2020, 6:09 AM EDT



Philip Morris Posts Strong Earnings, but Warns the Pandemic Will Dent Cigarette Sales

By Bill Alpert April 21, 2020 9:46 am ET



Imperial Brands Is Soaring Because Tobacco Demand Is Immune to Coronavirus

By Pallavi Manan March '21 9:50 11:48 am ET



Cigarette sales may see steepest dip in 20 years on lockdown, tax rise

The sector witnessed the last steepest decline in 2015 when sales volume contracted by 8.2 per cent

Avishek Rakshit | Kolkata
Last Updated at April 27, 2020 22:54 IST



Boost for smokers: Western Cape lifts 'lockdown ban' on cigarette sales

Looks like smokers in the Western Cape have won the postcode lottery. It's been confirmed that the ban on cigarette sales here has been lifted.



Traditional cigarette sales decline after initial stockpiling related to COVID-19 pandemic

By Richard Craver Winston-Salem Journal Apr 16, 2020



Govt bans spitting, sale of liquor, tobacco in second phase of lockdown

2 min read . Updated: 15 Apr 2020, 11:49 PM IST

Pretika Khanna, Gireesh Chandra Prasad



Swedish Match lands profit beat but sees pandemic hit ahead



Cigarette sales, outdoor exercise to be eased from May 1, but booze ban stays

BY STAFF REPORTER - 23 April 2020 - 21:47



Smokers' woes: some cut down on cigarettes, others turn to bidis



Jatin Anand

Noida, April 11, 2020 .
UPDATED: APRIL 11, 2020 .



OBJECTIVE

- TO BETTER UNDERSTAND HOW NICOTINE CONSUMERS ARE COPING DURING THIS CRISIS THROUGH AN EXPLORATION OF SELF-REPORTED TOBACCO USE HABITS AND OTHER BEHAVIORS •

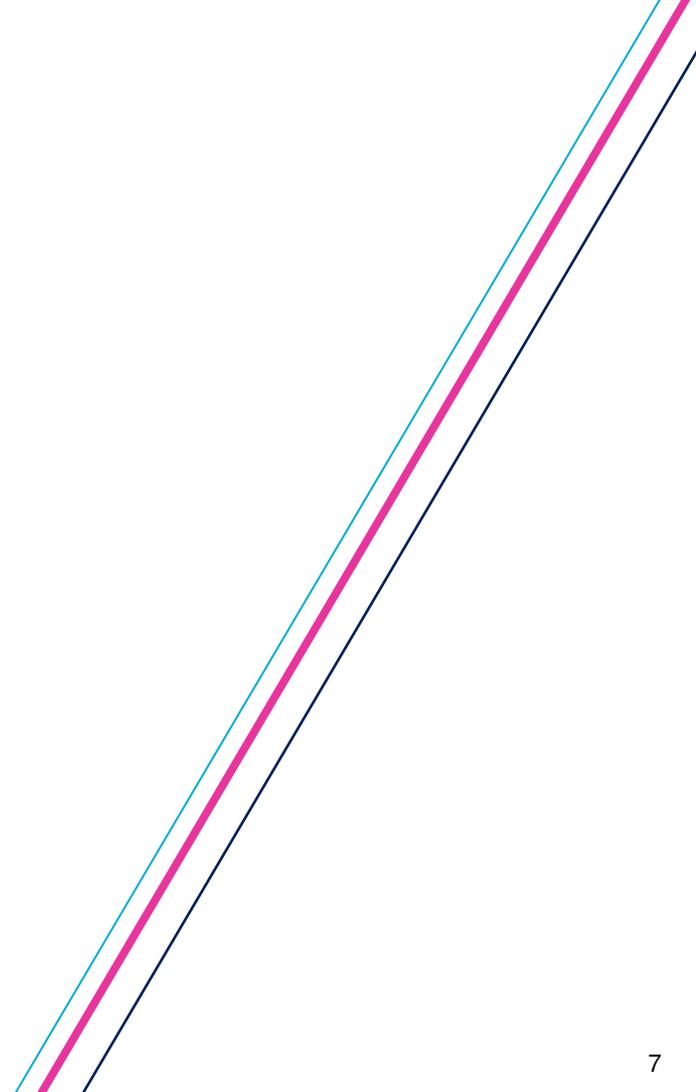
THE FOUNDATION'S POLL WAS CONDUCTED IN: **ITALY, INDIA, SOUTH AFRICA, UK AND US (NEW YORK AND CA)**.

THESE COUNTRIES WERE SELECTED BASED ON THEIR GOVERNMENTS REQUIRING OR URGING THAT PEOPLE REMAIN AT HOME TO SLOW THE SPREAD OF COVID-19. RESPONDENTS WERE LIMITED TO USERS OF CIGARETTES, OTHER COMBUSTIBLE TOBACCO PRODUCTS, AND NICOTINE VAPE PRODUCTS (E-CIGARETTES).

RESEARCH QUESTIONS:

- HOW HAS THE SITUATION CHANGED PHYSICAL AND EMOTIONAL WELLBEING?
- HOW HAS THIS STRESSFUL SITUATION IMPACTED ACCESS AND PRODUCT USE BEHAVIOR?
- HOW ARE USERS' BEHAVIORS AFFECTING THE NONSMOKERS AROUND THEM, INCLUDING CHILDREN, SPOUSES, AND ELDERLY FAMILY MEMBERS?

II. METHODOLOGY



RESEARCH DESIGN

Interview Method

- Online Interviews

Sample Size

- Five pilot interviews were conducted prior to finalizing the questionnaires
- n= 6800 interviews

Target Group

- Gender: Men and Women
- Age: 18-69 years (USA 21yrs +)
- Regular smokers of combustible tobacco or users of nicotine vape products who used the products several times in the past month and smoke at least weekly

Coverage

- USA (New York and California), UK, Italy, South Africa and India

Fieldwork Duration

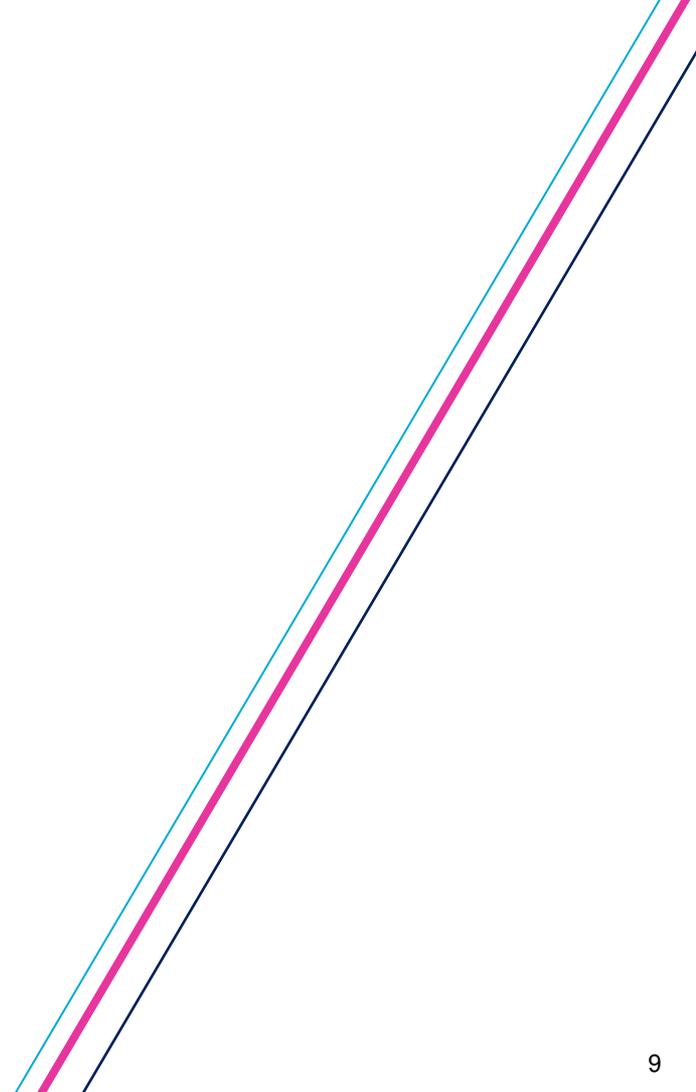
- 4/4/2020-4/14/2020

COUNTRY	LOCKDOWN	EXERCISE OUTSIDE	TOBACCO SALES	VAPE SALES
ITALY	MAR 11 – MAY 3	X RESTRICTED*	✓	✓
INDIA	MAR 24 – MAY 3	X	✓ ^	X BANNED
S. AFRICA	MAR 27 – MAY 1	X	X	X
UK	MAR 23 – MAY 7	✓ LIMITED	✓	X
US	CA: MAR 19 – NY: MAR 22 – MAY 15	✓	✓	✓

*Conflicting reports; solitary, close to home may be okay

^At the time of the survey. Restricted on April 20.

III. KEY FINDINGS



SUMMARY

IMPACT OF COVID-19 ON DAY-TO-DAY LIFE

- In all countries surveyed, a majority of people are permitted **only ‘essential’ activities**, such as going to the grocery store or pharmacy. Going into work is restricted across countries. In India, Italy and South Africa, even taking a walk is restricted.
- About one in three product users have **lost their job** or live with someone who lost a job. In the USA, the job loss rate is even higher at 40%.
- Those dependent on nicotine are **concerned about access** to the products they use (a finding that coheres with other reports).
- Very few respondents or members of their households were **tested and diagnosed** as positive for the novel coronavirus.

SUMMARY

IMPACT ON PERSONAL HEALTH AND HAPPINESS

- About one third of respondents report that social distancing has negatively affected their **mental health**. In general, women report a higher level of impact on their mental health than men.
- In all five countries, a majority of product users reported nicotine or tobacco product use as their normal **stress and anxiety coping mechanism**.
- Across all countries, **primary concerns** included become ill, job loss, and dealing with stress during the lockdown.
- In households where someone had tested positive for COVID-19, there are increased impacts on **mental health** as well as an increased **desire to quit** product use.

SUMMARY

IMPACT OF COVID-19 ON TOBACCO / NICOTINE CONSUMPTION: CONSUMPTION & PURCHASE HABITS

- There is virtually no change in reported product **consumption** during the COVID-19 lockdown compared to pre-COVID habits. Consumption of THR products has only marginally increased across countries.
- Despite normal consumption trends, 30%-45% of exclusive combustible tobacco users are **purchasing** more cigarettes than usual, motivated by a fear that stores might run out of stock or be closed during lockdown. These results are in line with market reports of stockpiling behavior.
- **In-home smoking** increased in Italy (pre-lockdown: 61%, during lockdown: 71%) and in India (pre-lockdown: 51%, during lockdown: 61%) among exclusive combustible tobacco smokers. Among exclusive THR product users, no change was observed for in-home vaping during the lockdown compared to pre-COVID habits.

SUMMARY

IMPACT OF COVID-19 ON TOBACCO/ NICOTINE CONSUMPTION: CHANGE IN USAGE BEHAVIOR & ATTITUDE

- In Italy, the UK and US many product users believe that smoking does not increase the risk of **contracting COVID-19**. However, in India, roughly half of product users believe that smoking increases the risk of contracting COVID-19.
- Most respondents believed that **vaping was less risky** than smoking, with respect to COVID-19.
- About half of all respondents have considered **quitting** all nicotine products during the lockdown, however only a fraction of those have actually attempted to quit.
- Only about one in five cigarette smokers have indicated that they may **switch to vaping** during the lockdown, a lower rate than seen in recent [FSFW polls](#).

IV. DETAILED FINDINGS

ACHIEVED SAMPLE: QUANTITATIVE MODULE

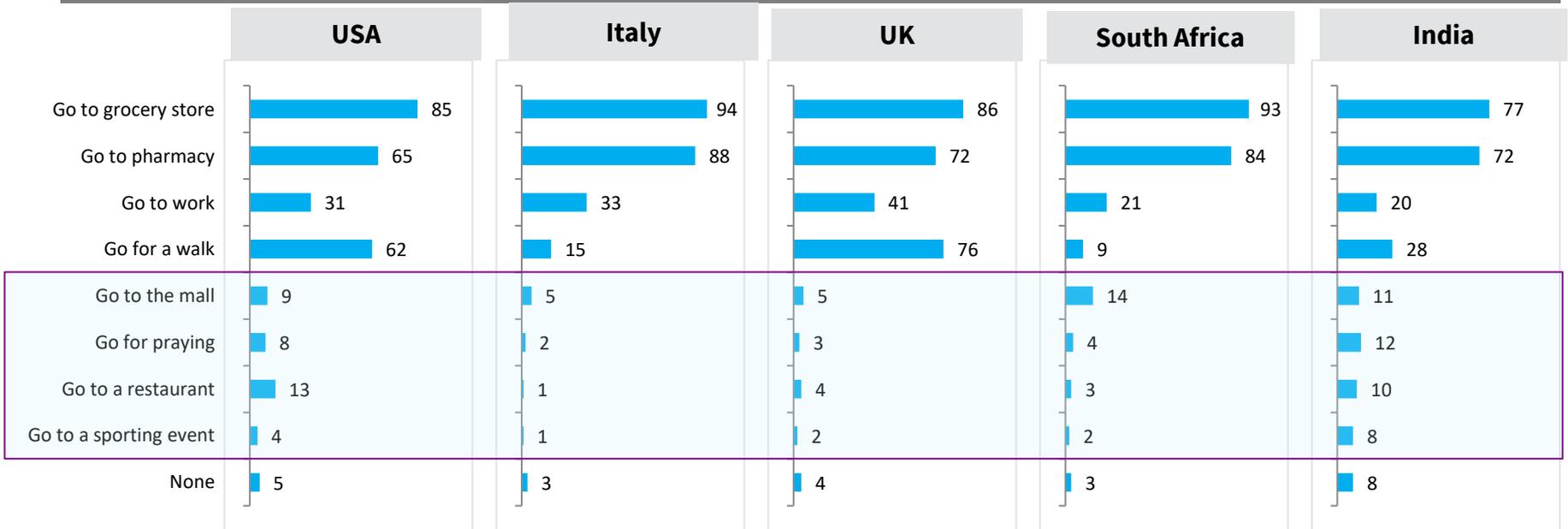
	USA	Italy	UK	S. Africa	India
Sex					
All	1501	800	1500	1500	1500
Men	624	443	697	1087	1419
Women	875	357	799	412	79
Others	2	0	4	0	2
Age Group					
18-24yrs	114	81	211	250	345
25-39yrs	668	223	605	566	713
40-54 yrs	389	267	394	472	317
55-64 yrs	167	136	211	212	89
65+ yrs	163	93	79		36
Country					
Rural area or village (India- Town class 3 &4)	222	44	232	100	102
Small or middle-sized town (India _Town class 1&2)	431	574	626	550	353
Large city (India _ Metros)	790	178	627	812	1021
I don't know	0	0	27	0	0
User Group					
Exclusive combustible tobacco user	802	393	769	1026	631
Exclusive tobacco harm reduction product users	81	81	189	63	14
Poly users	599	321	531	396	788
Exclusive smokeless tobacco users (not reported)	7	5	3	8	42
Other tobacco products (not reported)	13	0	8	9	15
Exclusive bidi user (not reported)	0	0	0	0	10

IV-1. IMPACT OF COVID-19 ON DAY-TO-DAY LIFE

ACTIVITIES CURRENTLY PERMITTED

In most countries, only essential activities like going to the grocery store or pharmacy are allowed. Some countries imposed restrictions out outdoor activities— only 28% of users in India, 15% of users in Italy, and 9% of users in South Africa reported walking as a permitted activity during the COVID-19 outbreak.

Q22: Please select which of the following outdoor activities you are currently allowed to do



Figures are in %

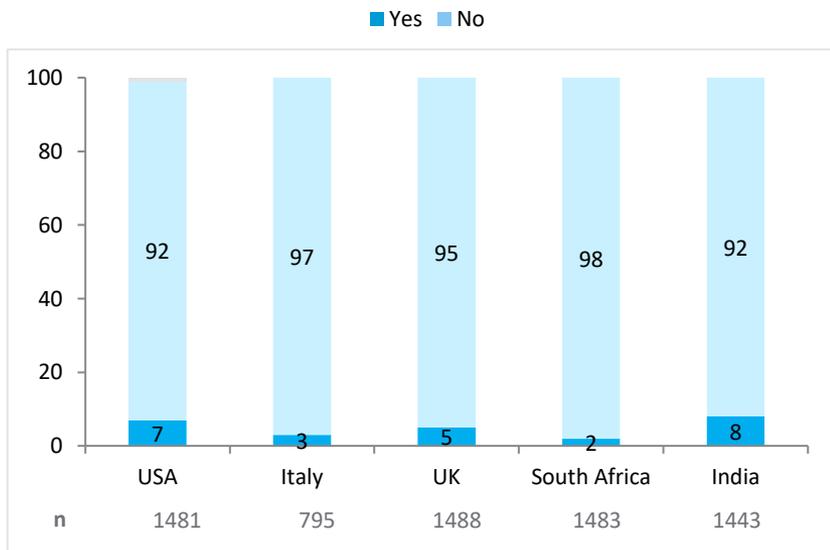
Base : All USA n=1481, Italy n=795, UK n=1488, South Africa n=1483, India n=1443

DIRECT IMPACT OF COVID-19

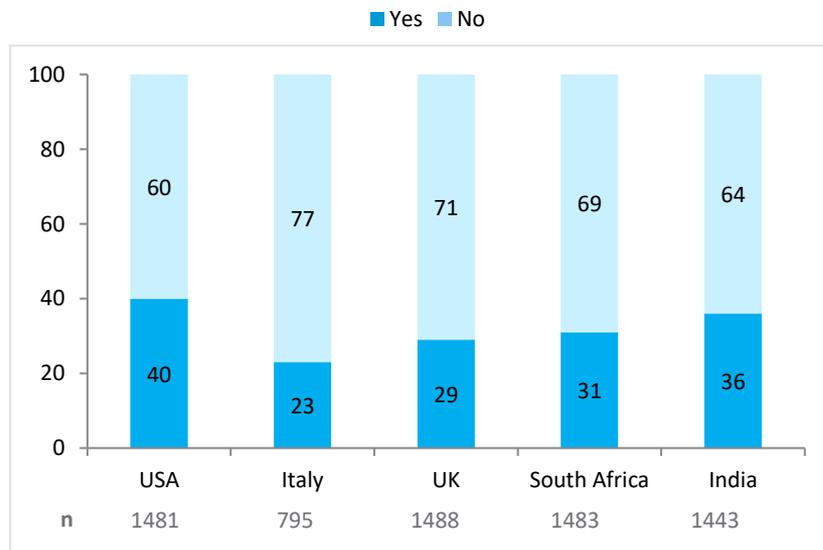
Very few respondents or members of their households tested positive for COVID-19.

About 1 in 3 respondents have lost their job or had someone in their household lose their job. In the US, the job loss rate is at 40%.

Q3. Have you or anyone in your household been tested and diagnosed as positive for the novel coronavirus?



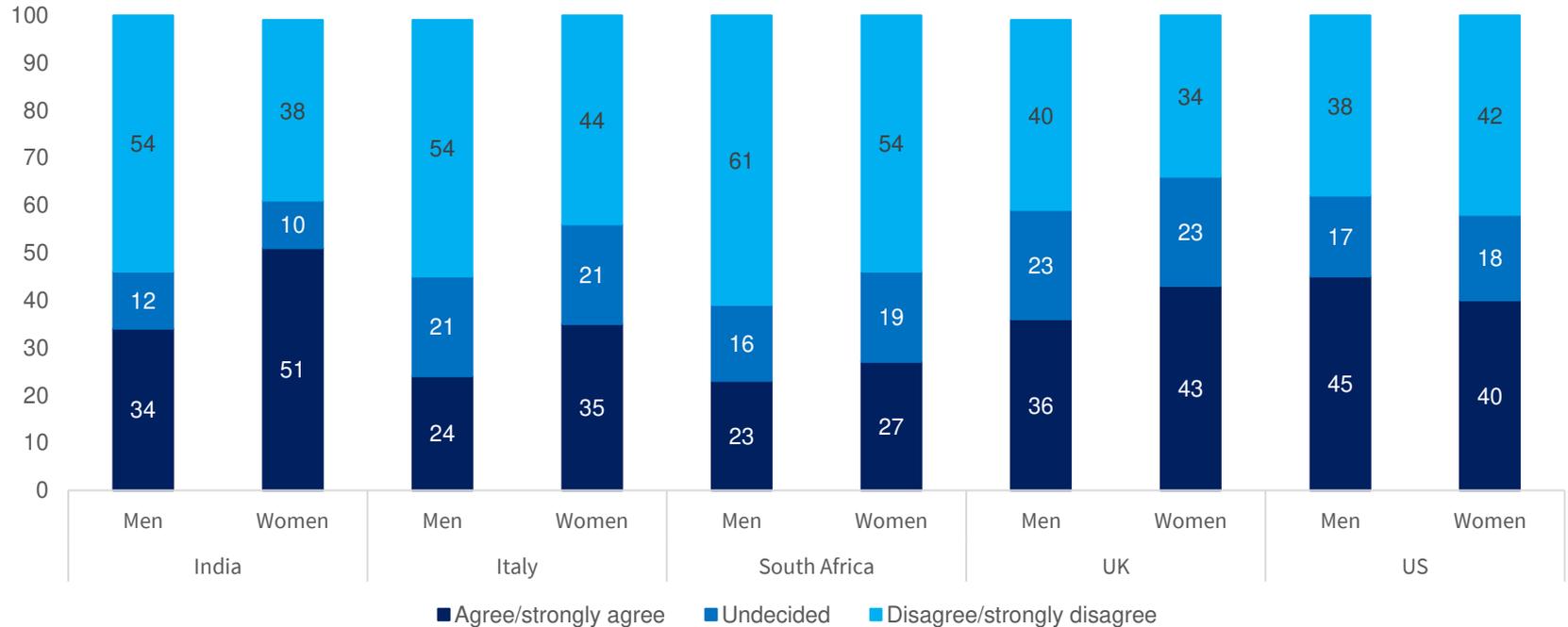
Q44. Have you or anyone in your household lost their job due to the current crisis?



IMPACT ON MENTAL HEALTH

Social distancing measures are having a profound effect on mental health. In general, women more more likely than men to agree with the claim that social distancing has negatively impacted their mental health.

Q37: Let us know if you agree with the following statement: "Social distancing has negatively impacted my mental health."



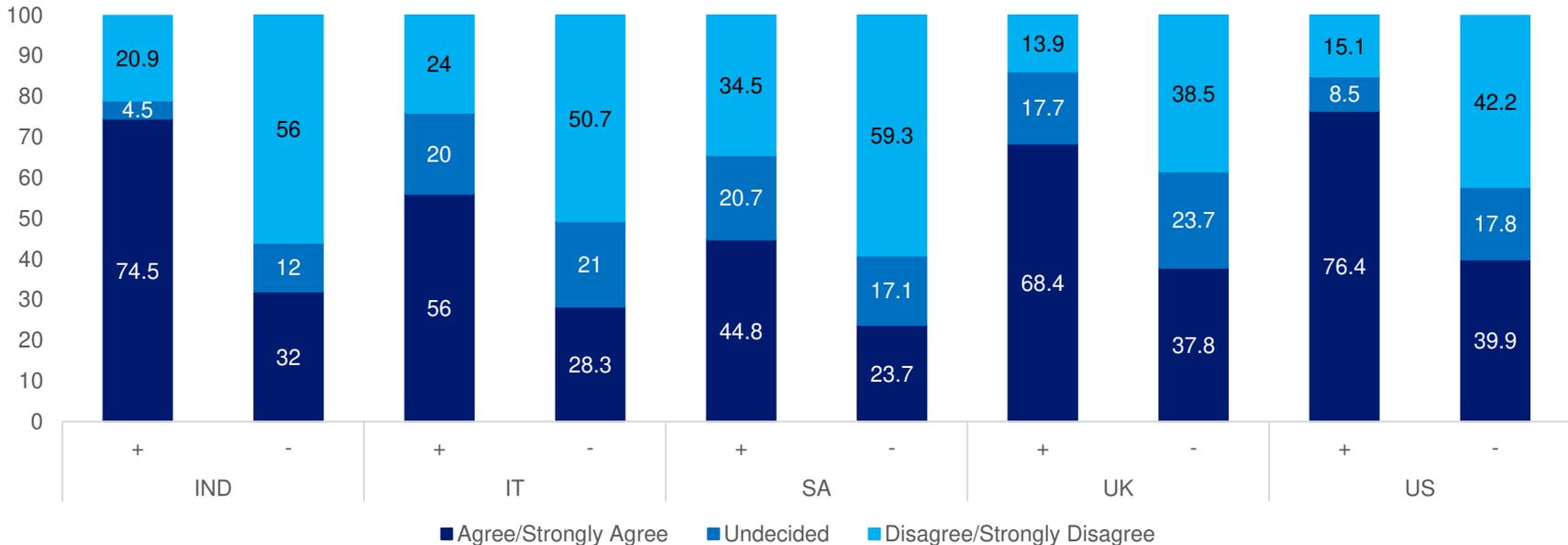
Figures are in %
Base : Poly users

MENTAL HEALTH IN COVID-19 POSITIVE HOUSEHOLDS

In households where someone tested positive for COVID-19, more product users agree or strongly agree that social distancing has negatively impacted their mental health*.

All product users

Q37: Let us know if you agree with the following statement: "Social distancing has negatively impacted my mental health".



Figures are in %

Positive households N*: IND=110, IT=25, SA=29, UK=79, US=106

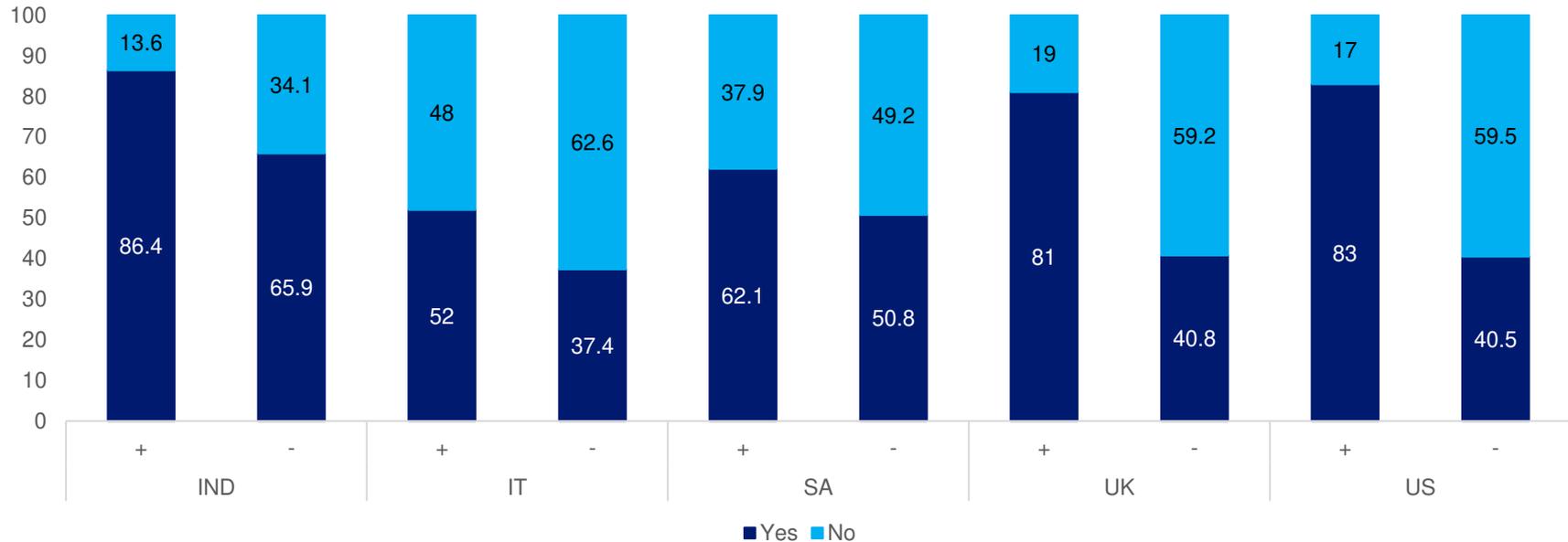
Negative households N: IND=1386, IT=775, SA=1464, UK=1419, US=1387

QUIT INTENTIONS IN COVID-19 POSITIVE HOUSEHOLDS

In households where someone tested positive for COVID-19, more product users reported that the COVID-19 outbreak has influenced their desire to quit smoking or vaping for health reasons*.

All product users

Q32: Does the COVID-19 outbreak affect your desire to quit smoking or vaping for health reasons?

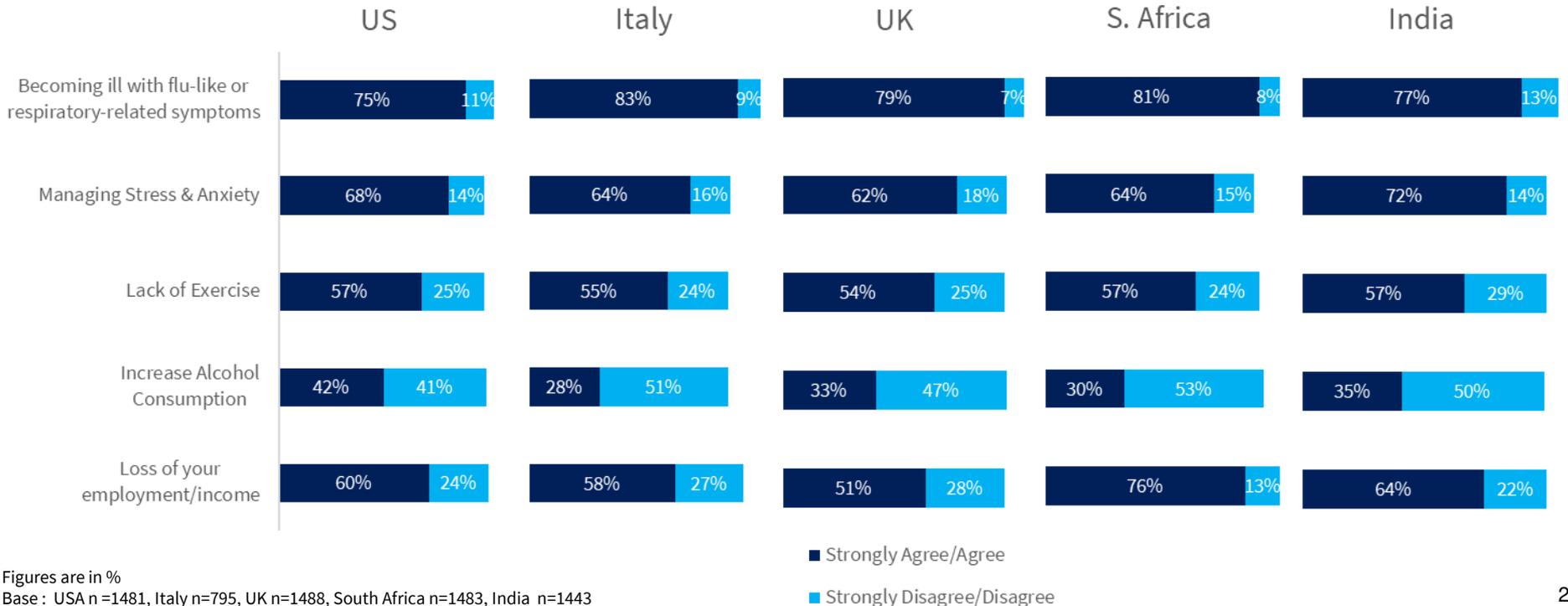


Figures are in %
Positive household*s N: IND=110, IT=25, SA=29, UK=79, US=106
Negative households N: IND=1386, IT=775, SA=1464, UK=1419, US=1387

CONCERNS RELATED TO COVID-19 MITIGATION MEASURES

Respondents from all countries are worried about getting sick, losing their jobs, and how they will manage the stress of social distancing measures.

Q43: "I am concerned about the following risks related to COVID-19 mitigation measures (including social distancing, COVID-19 lockdown/quarantine, disease spread)more generally:

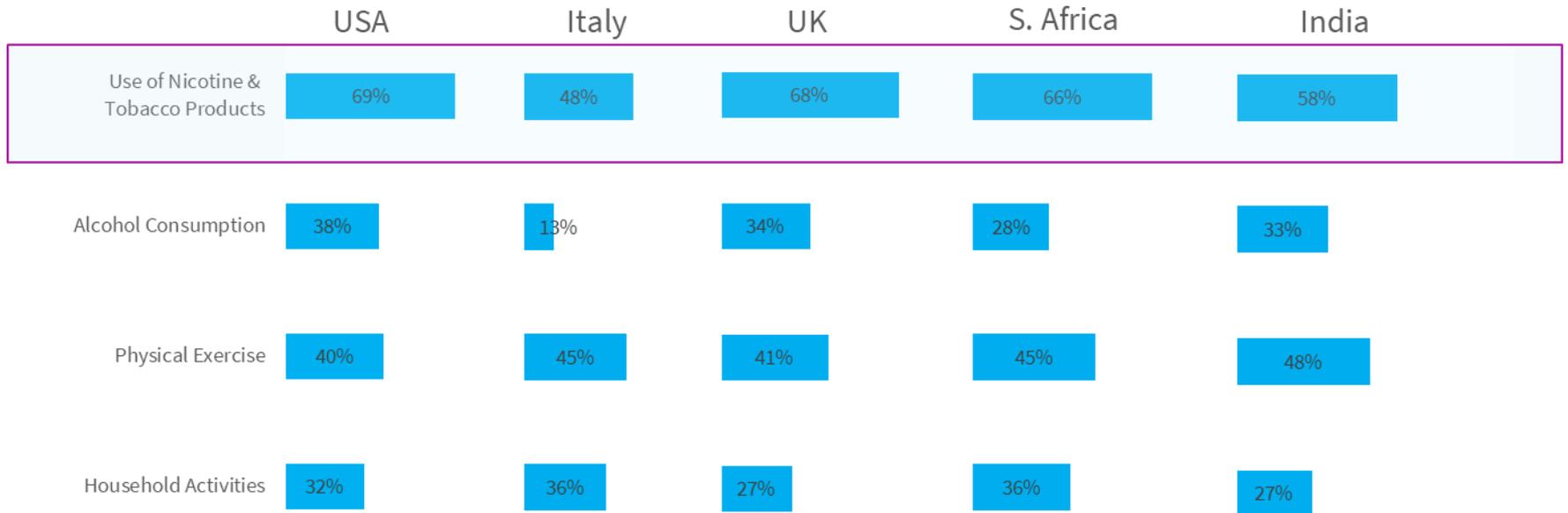


Figures are in %
 Base : USA n=1481, Italy n=795, UK n=1488, South Africa n=1483, India n=1443

COPING MECHANISM

In all five of the surveyed countries, most product users report nicotine and tobacco products as their normal coping mechanism for stress and anxiety.

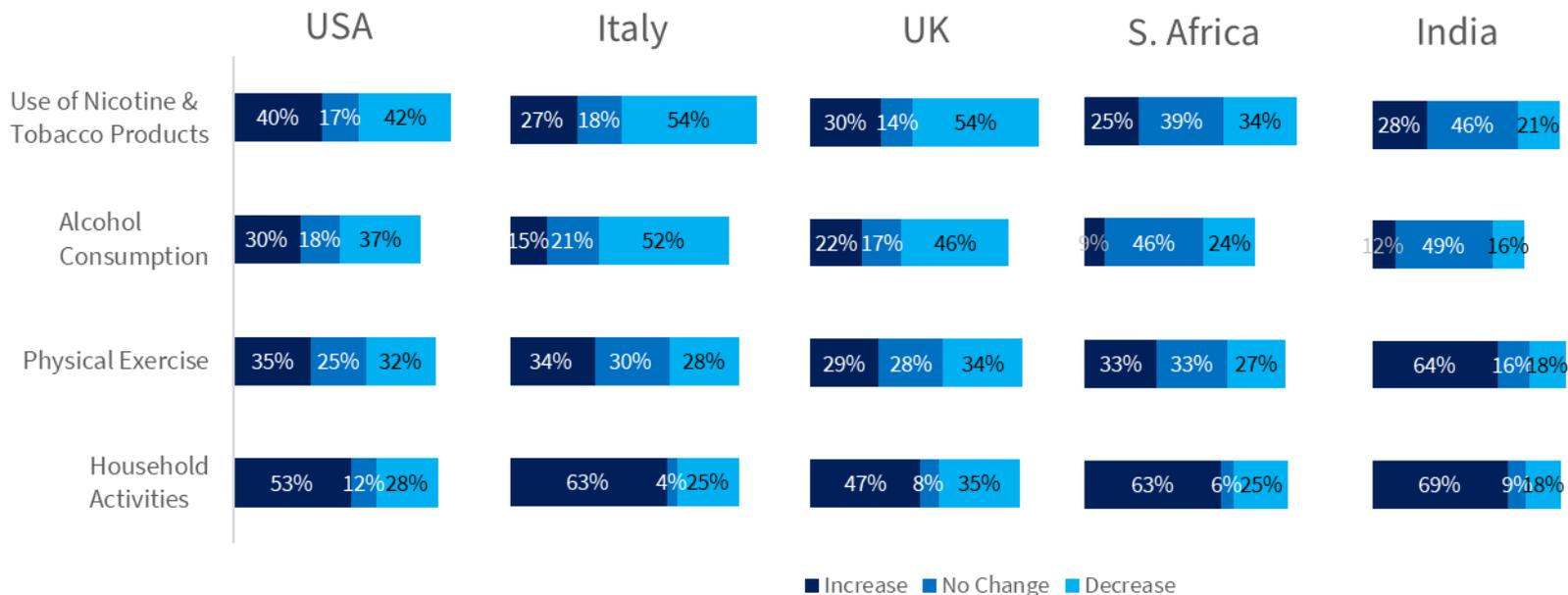
Q38: Which of the following behaviors do you normally use to cope with stress or anxiety?



IMPACT OF SOCIAL DISTANCING

Behaviors vary greatly, with some respondents reporting increased use of nicotine products, and others reporting decreased use. There was an expected overall increase in household activities.

Q39: How would you say that stay-at-home/social distancing measures have impacted the frequency of the following activities



IV-2. IMPACT OF COVID-19 ON TOBACCO / NICOTINE CONSUMPTION

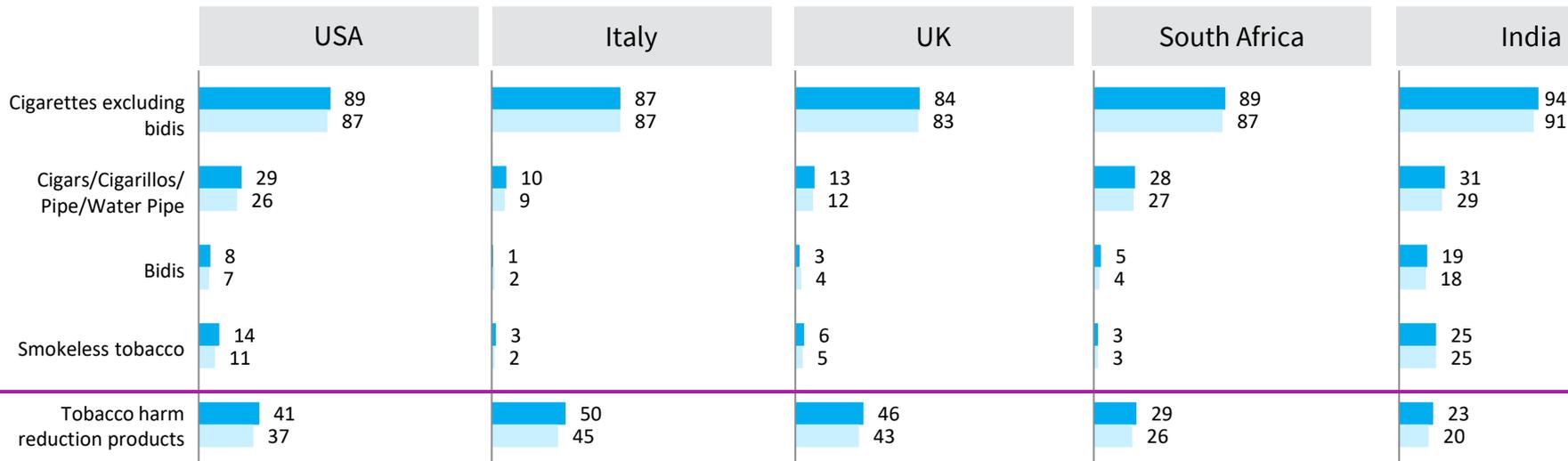
UNCHANGED PRODUCT CONSUMPTION

PRE-LOCKDOWN VS. LOCKDOWN

There has been virtually no change in product consumption during the COVID-19 lockdown compared with pre-COVID consumption habits. Consumption of THR products has only marginally increased across countries.

Q4. Of the following tobacco products, which products do you currently consume?
Q7. Of the following tobacco products, which products did you consume before the COVID-19 lockdown?

■ Currently Consume ■ Consume before COVID-19 lockdown



Figures are in %

Base : USA n=1481, Italy n=795, UK n=1488, South Africa n=1483, India n=1443

UNCHANGED CIGARETTE CONSUMPTION

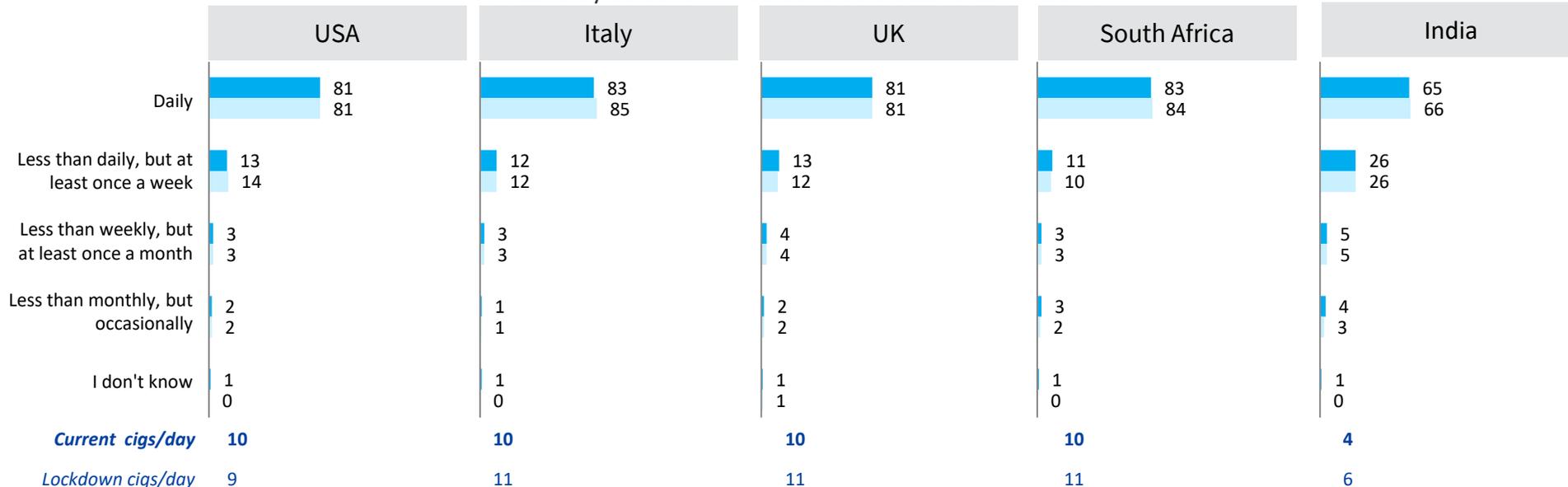
CURRENT CONSUMPTION VS. PRE-LOCKDOWN CONSUMPTION

In line with results from [FSFW's 2019 Global Poll](#), a vast majority of cigarette users smoked daily. Smoker behavior (frequency, or cigarettes consumed per day) did not change due to the lockdown.

Q5. How often do you currently consume cigarettes excluding bidis?

Q8. How often did you consume cigarettes excluding bidis before the COVID-19 lockdown?

■ Currently Consume ■ Consume before COVID-19 lockdown



Figures are in %

Base : USA Current n=1302 Before lockdown n=1280, Italy Current n=681 Before lockdown n=683, UK Current n=1250 Before lockdown n=1221, South Africa Current n=1301 Before lockdown n=1290, India Current n=1353 Before lockdown n=1314

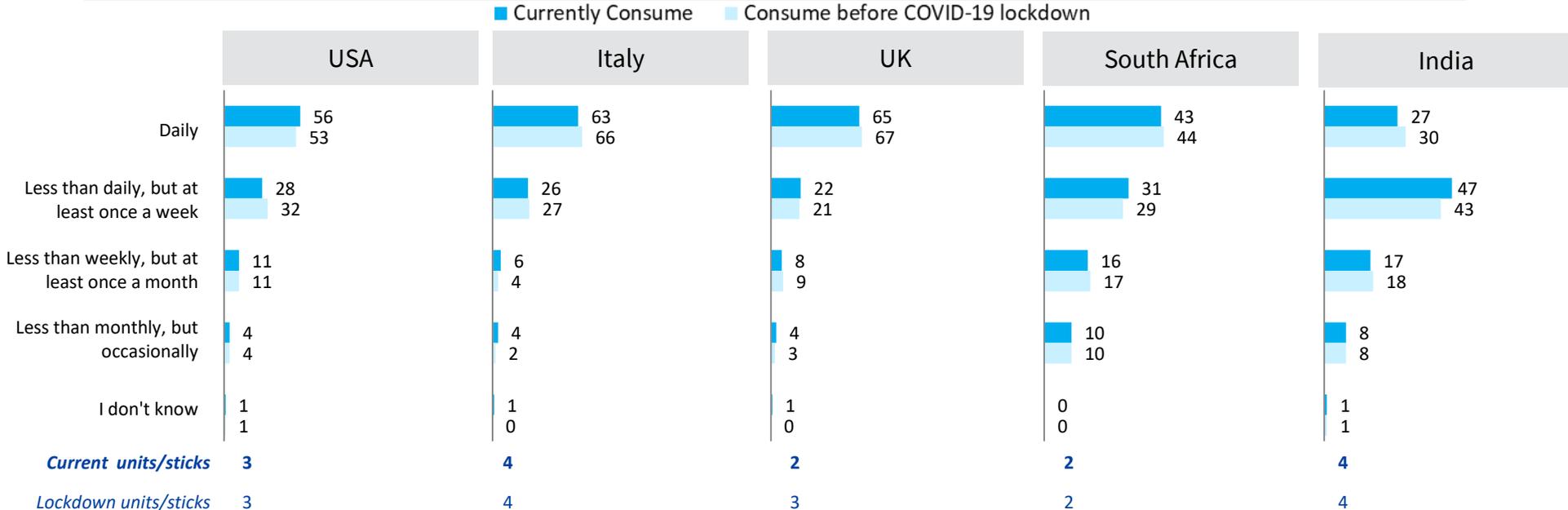
UNCHANGED THR PRODUCT CONSUMPTION

CURRENT CONSUMPTION VS. PRE-LOCKDOWN CONSUMPTION

Rates of THR product consumption and average daily consumption remained unchanged during lockdown. These results were consistent with daily and occasional use rates from the [FSFW 2019 Global State of Smoking Poll](#).

Q5. How often do you currently consume tobacco harm reduction products?

Q8. How often did you consume tobacco harm reduction products before the COVID-19 lockdown?



Figures are in %
 Base : USA Current n=608 Before lockdown n=545, Italy Current n=387 Before lockdown n=361, UK Current n=686 Before lockdown n=640, South Africa Current n=434 Before lockdown n=388, India Current n=325 Before lockdown n=284

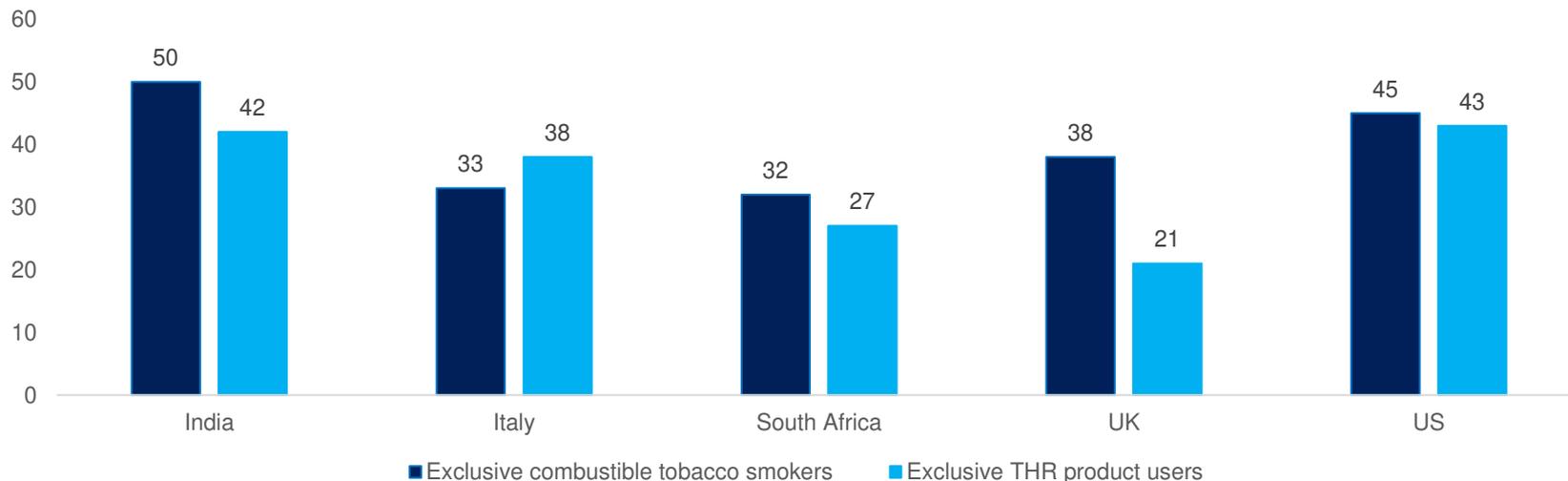
PURCHASING BEHAVIOR

Approximately 35% to 50% of exclusive combustible tobacco smokers report buying more products than usual. Lower proportions of THR product users and poly product users report increased purchasing.

Reasons for these behaviors include fears of stores closing or running out of stock, and of not being able to leave the home.

All product users
Q23: Have you been buying more product than you usually did before the COVID-19 lockdown?

Product users who have bought more product



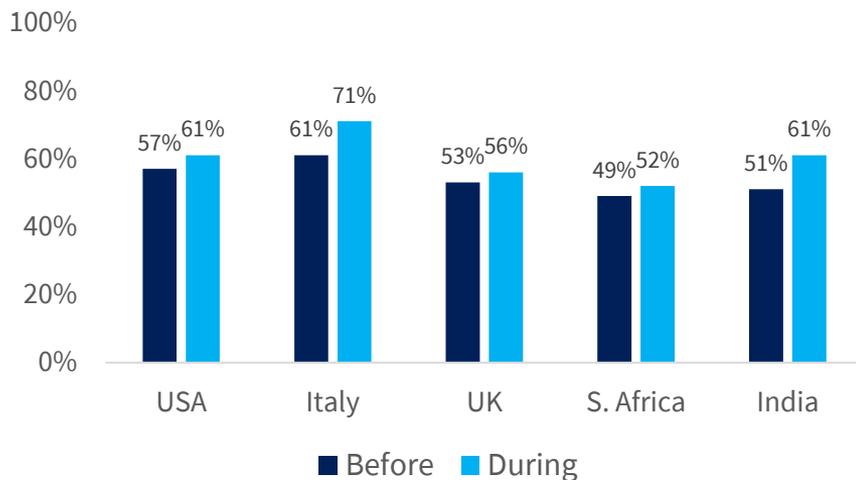
IN-HOME CONSUMPTION BEFORE AND DURING COVID-19 LOCKDOWN

Rates of smoking in the home increased in Italy (pre-lockdown: 61%, during lockdown: 71%) and in India (pre-lockdown: 51%, during lockdown: 61%) among exclusive combustible tobacco smokers.

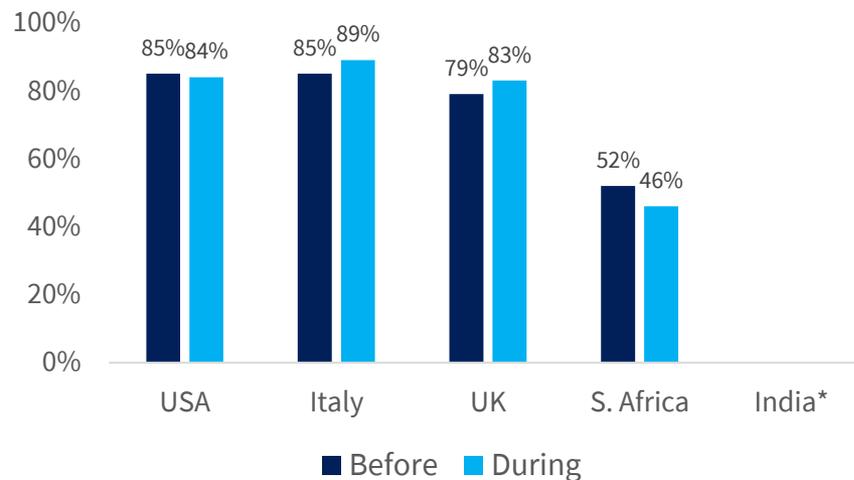
Q25: Did you consume “following tobacco product” inside your home before the COVID-19 lockdown?

Q24: Do you currently consume “following tobacco product” inside your home, including within any room, or out of an open window or balcony?

Exclusive Combustible Tobacco Smokers



Exclusive THR product users



Figures are in %

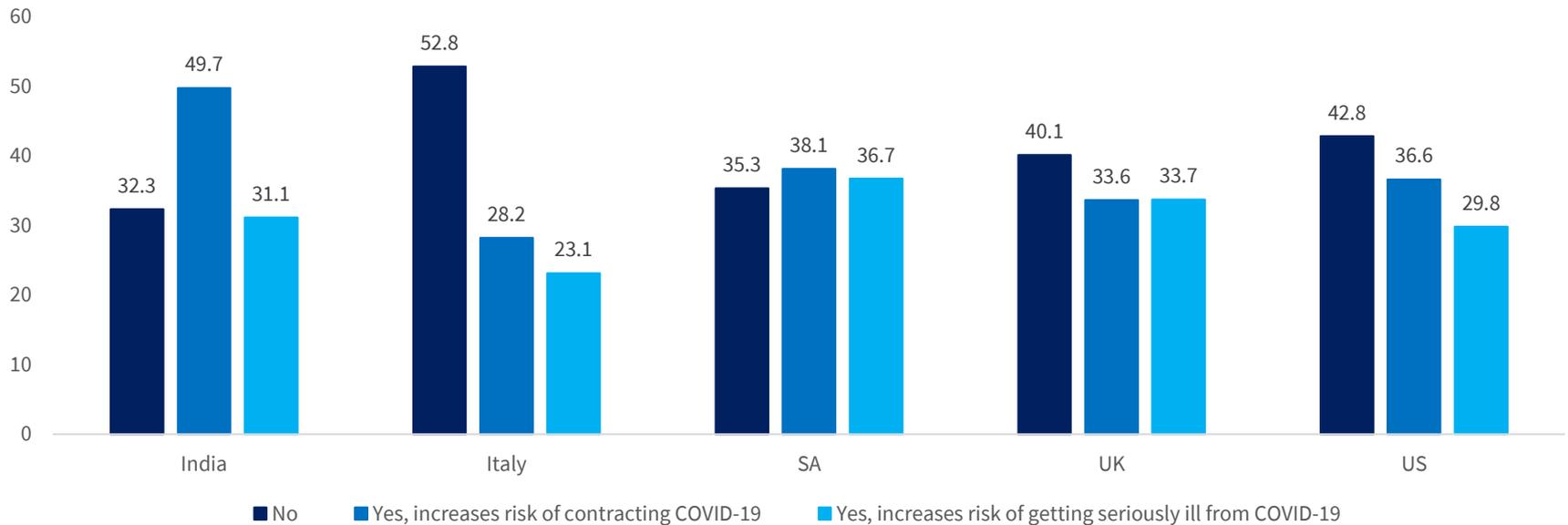
Base : Exclusive Tobacco Product Users - USA: n=802 ; Italy: n=393 ; UK: n=769 ; S. Africa: n=1026 ; India: n=888 / Exclusive THR product users- USA: n=81 ; Italy: n=81 ; UK: n=189 ; S. Africa: n=63 ; India*: n=10 – Low

SMOKING & COVID-19 RISK

In Italy, the UK and the US, many product users believe that smoking does not increase the risk of contracting COVID-19. However, in India, roughly half of product users believe that smoking increases the risk of contracting COVID-19.

All product users

Q26: Do you believe smoking increases COVID-19 risk?

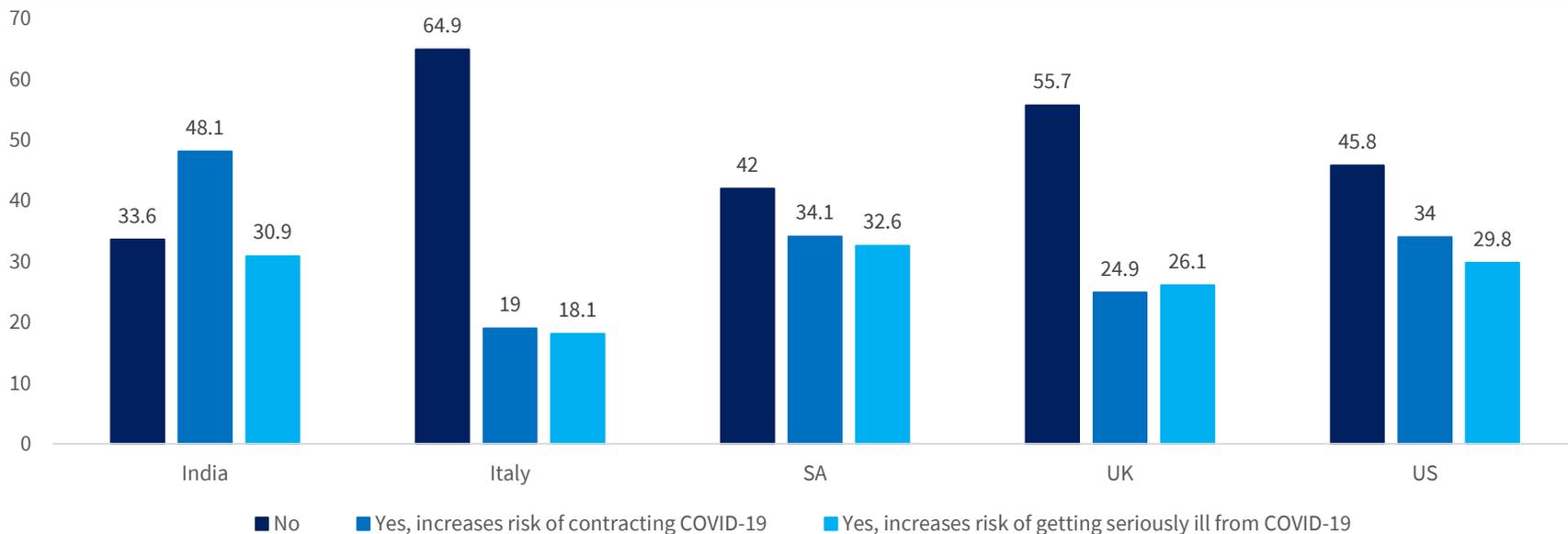


VAPING & COVID-19 RISK

Most respondents believed that, when it came to COVID-19, vaping was less risky than smoking. Most product users did not believe that vaping increased the risk of contracting or getting seriously ill from COVID-19, except in India where many product users believed that vaping increases the risk of contracting the virus.

All product users

Q27: Do you believe vaping increases COVID-19 risk?

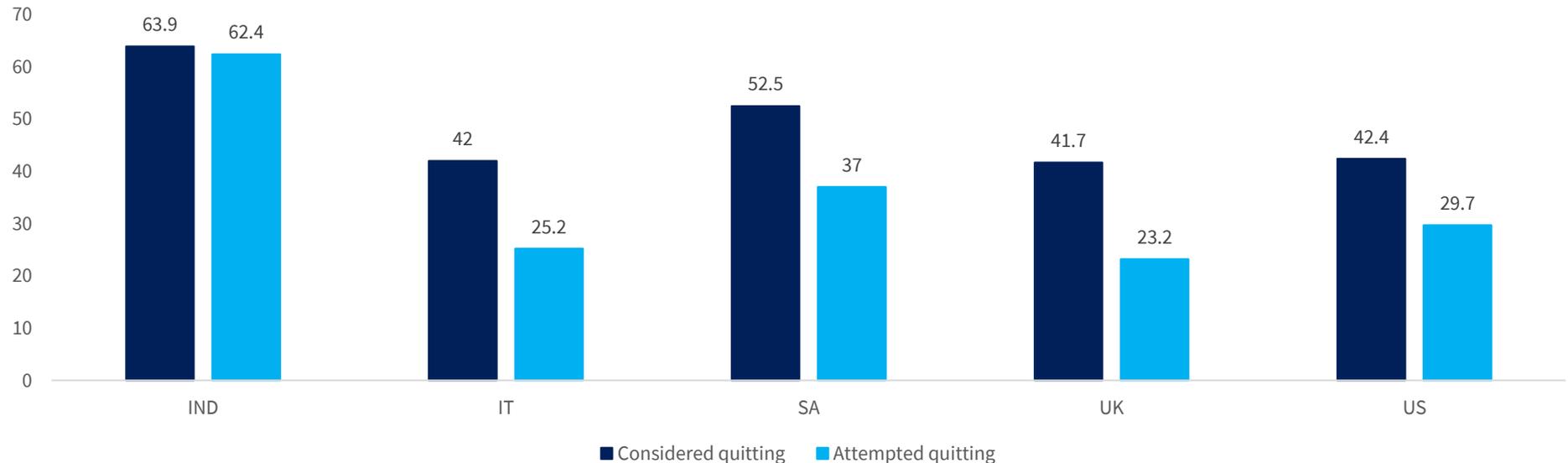


QUITTING ATTEMPTS DURING COVID-19

Higher proportions of product users have considered quitting than have attempted to do so, with the exception of India. More than half of exclusive THR product users in South Africa have considered and attempted quitting all nicotine and tobacco products in light of the COVID-19 lockdown.

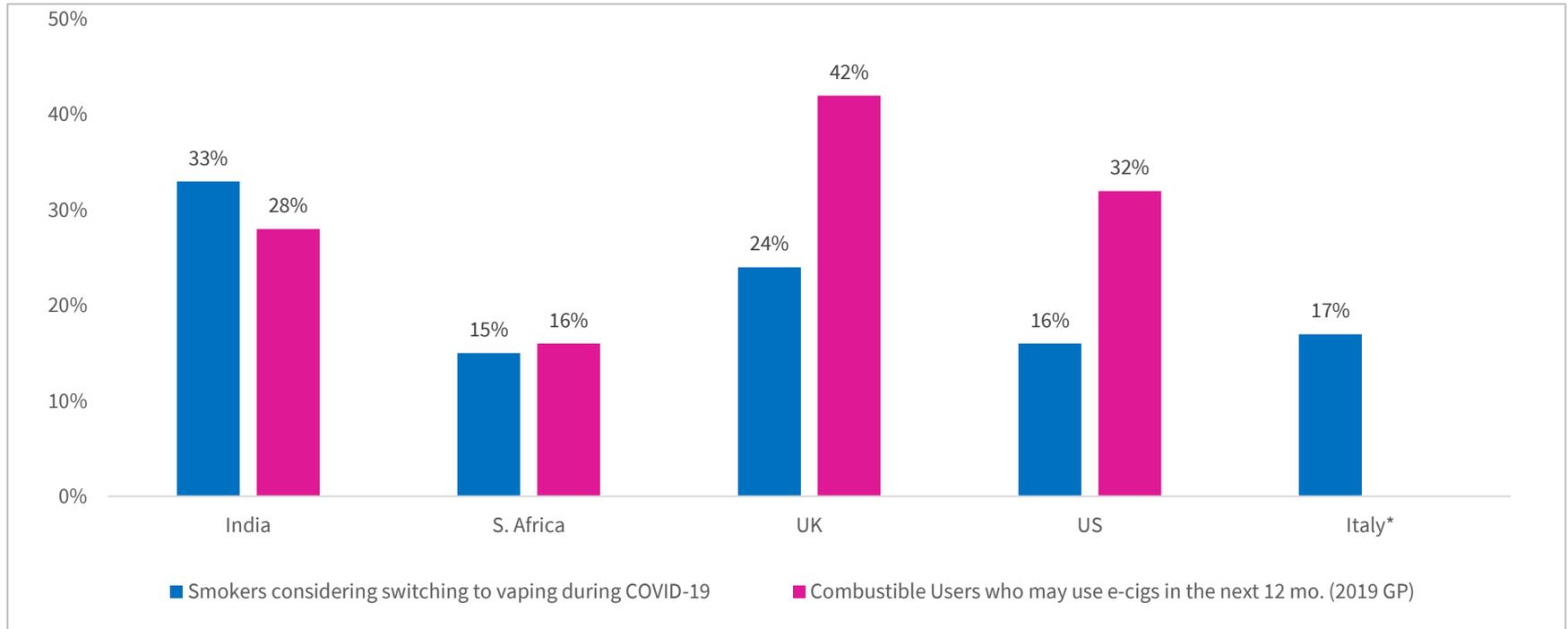
Q35: Have you considered quitting all nicotine and tobacco products because of the COVID-19 lockdown?

Q35.5: Have you attempted to quit all nicotine and tobacco products during the COVID-19 lockdown?



COMBUSTIBLE PRODUCT USERS WHO MIGHT SWITCH TO VAPING

Most exclusive combustible tobacco smokers in all countries have not considered switching to vaping during COVID-19 lockdown. In the UK and the US, rates are somewhat lower than those observed in the [2019 Global Poll](#).



Figures are in %
Base: [COVID-19 poll](#): India: n=540; S. Africa: n=391; UK: n=525; US: n=593; Italy: n=320 / [Global Poll](#): India: n=22785; S. Africa: n=2041; UK: n=1037; US: n=1036; Italy* - not surveyed