

FOUNDATION FOR A
SMOKE-FREE WORLD

Global State Of Smoking Poll - 2019

UNITED KINGDOM

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1. BACKGROUND

CONTEXT AND OBJECTIVES

Foundation for a Smoke-Free World (FSFW) aims to improve global health by ending smoking in this generation.

The areas of focus include smoking cessation and harm reduction, as supported by new technologies, therapies, alternative products, behavioral science, and other approaches.

FSFW conducted a global poll across a range of countries to gain a clear understanding of the current landscape of habits and perceptions regarding tobacco products and alternative nicotine delivery systems (ANDS) among adults across the world, in light of different cultural, socio-economic, and tobacco-regulatory backgrounds. The study was conducted in 7 countries.

Research Objectives:

- Usage of various tobacco products and compounds
- Understand smokers' experiences and challenges
- Beliefs and perceptions in terms of harmfulness and addictiveness of different products and compounds

2. METHODOLOGY

RESEARCH DESIGN (QUANTITATIVE)

Interview Method:

- Online Interviews

Sample Size:

Six pilot interviews were conducted prior finalizing the questionnaires
n: 2250 online interviews

Target Group:

- Gender: Men/Women
- Age: 18- 69 years
- Current users of tobacco products/ vapers/ smokers and quitters who quit tobacco in last 5 years

Fieldwork Duration:

- 17th June, 2019 to 19th August, 2019

3. KEY FINDINGS

Current usage landscape of tobacco products and alternative products

- Cigarettes were the most widely used product (71%) among current product users, followed by vaping devices with nicotine (38%). 6% of current users used heat-not-burn products.
- Underage smoking was common; 52% of current cigarette smokers claimed they started smoking before the legal smoking age of 18 years.
- A majority of current product users were familiar with e-cigarettes. However, 38% of current female users have never heard of heat-not-burn products. The taste and the belief that heat-not-burn products or e-cigarettes are less harmful than cigarettes, were key reasons cited for starting to use these products.
- 19% of current cigarette smokers were highly or very highly dependent on nicotine.

Beliefs and Perception Among Current Users

- The majority of current users believed smoking is harmful to their health (76%) and to others around them (63%). 52% of current users believed health warning labels are exaggerated and 43% of current users reported not reading the health warning labels at all.
- 64% of current users considered e-cigarettes as less harmful than combustible tobacco. For heat-not-burn products and smokeless tobacco, 48% of those aware of these products thought they were less harmful than combustible tobacco.
- Among current users not using heat-not-burn products, 28% admitted they may use heat-not-burn products within the next 12 months. More men (37%) than women (21%) admitted they may use heat-not-burn products in the future.
- The majority of current users believed nicotine is harmful (77%) and addictive (84%). One out of four current product users believed that e-cigarettes and nicotine replacement therapies like patches or gums cause cancer.

Quitting and Quitters

- There were no major differences in participant characteristics between current users and quitters. However, there were more women among quitters.
- Risk perceptions were similar among current users and quitters.
- The majority (73%) of current users claimed they attempted to quit tobacco or alternative products. Every other current user reported planning to quit (50%). Planning to quit was more prevalent among 18-24 years old consumers (55%).
- The harmful effects of tobacco on health (67%) and family or friends' suggestions (25%) were the main reasons selected for quitting or attempting to quit. Half of product consumers claimed that a price increase would impact their tobacco consumption behavior. 33% of current users said they would consider reducing their consumption if prices increased.
- Apart from enjoying tobacco products (54%), difficulty in quitting (33%) was reported as one of the main obstacles to quitting. Multiple quit attempts suggested that quitting is a tough process. The average number of quit attempts was higher among women than men.

4. DETAILED FINDINGS

Achieved Sample : Quantitative Module

Sample by Demographics		
	n	%
All	2250	100
Men	1039	46
Women	1210	54
Others	1	0
18-24yrs	311	14
25-35yrs	690	31
36-50 yrs	672	30
51-70 yrs	577	26
Rural area or village	255	11
Small or middle sized town	452	20
Large town	1534	68
Prefer not to say/ don't know	9	0
Current users of tobacco and other products	1882	84
Quitters (who quit tobacco in last 5 years)	368	16

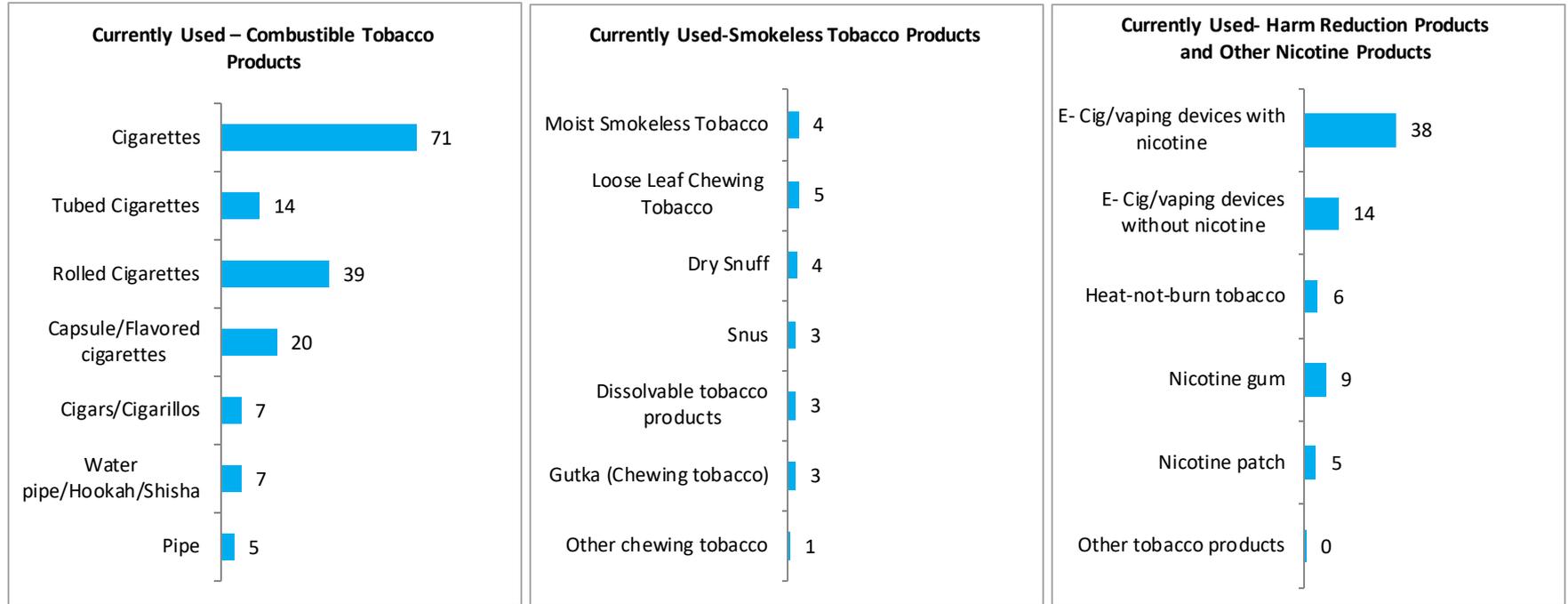
Smaller-sooner reward vs. Larger- delayed reward

Respondents were almost equally divided between the option of smaller vs. larger reward in case of a one-month waiting period. But in the case of 6 months waiting period, 60% of them opted for smaller- sooner reward.



4.1 Usage details of various tobacco products and other alternative products

Current usage of products



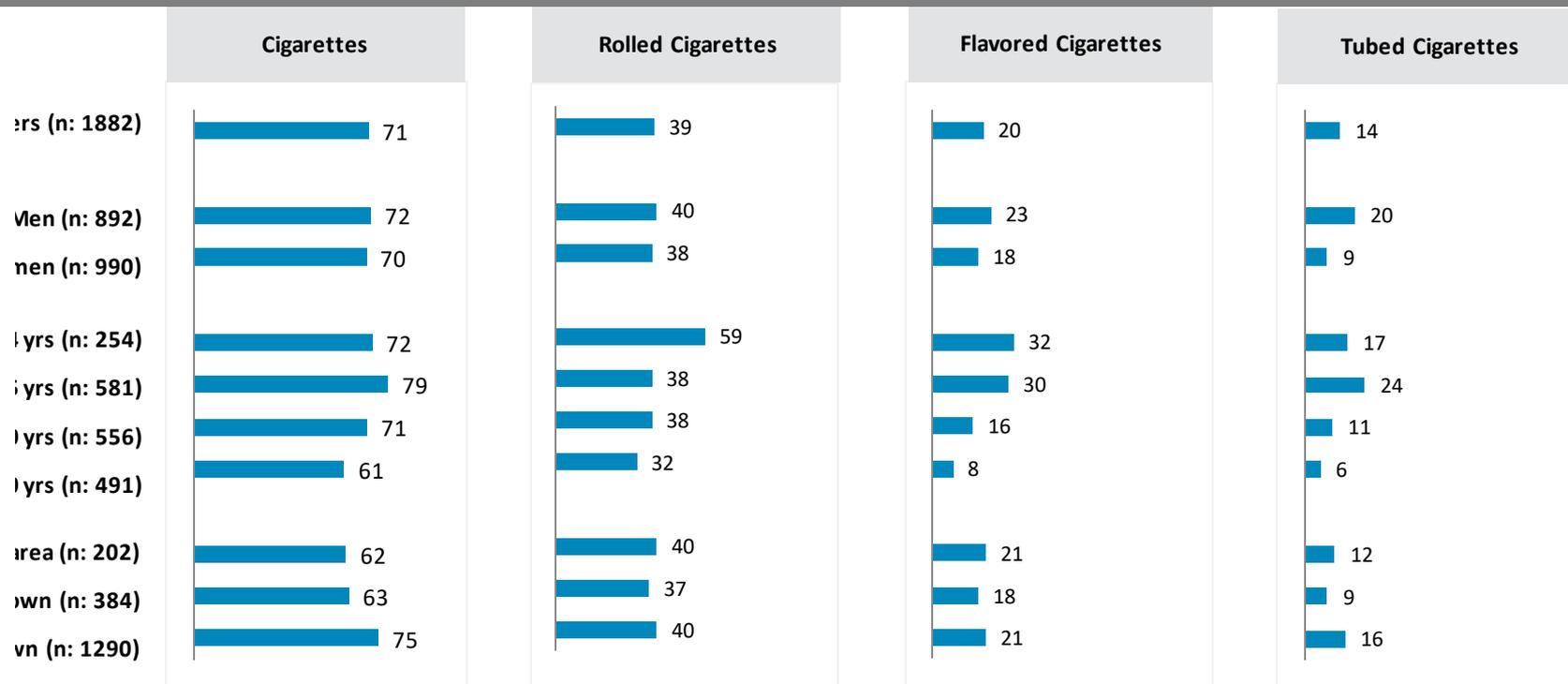
Combustible tobacco products : Cigarettes, Cigars, Water pipe, Bidis etc.

Smokeless tobacco products : Chewing tobacco, smokeless tobacco, snus etc.

Harm reduction products and other Nicotine Products : E-cig, Heat-not-burn products, Nicotine Gum/Patch etc.

Figures are in %
 Base : Random Sample, Users : n= 1882
 Q. C1. Of the following Tobacco products, which products are you currently consuming? (Select all that apply)

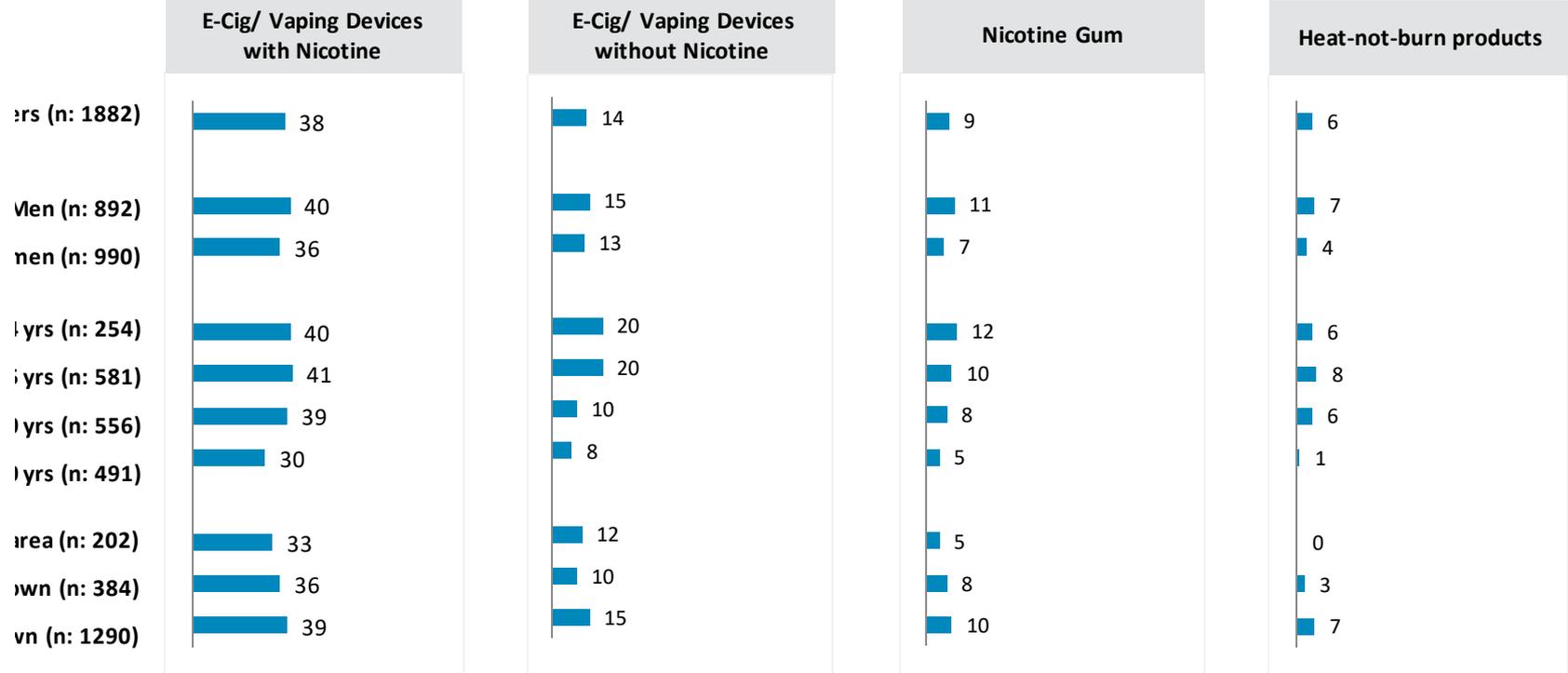
C1. Of the following products, which products are you currently consuming?



Figures are in %

Base : Random Sample, Current Users Q. C1. Of the following Tobacco products, which products are you currently consuming? (Select all that apply)

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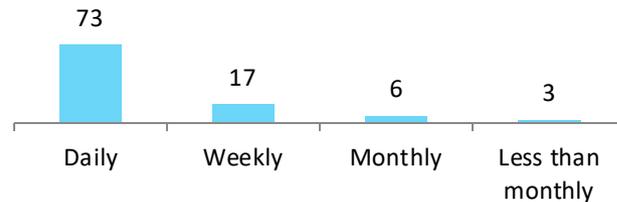
Usage at a glance : Cigarettes (1/2)

Cigarettes

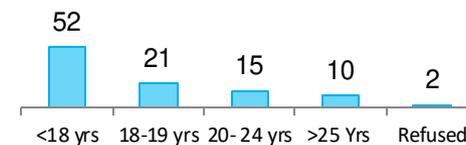
Current Usage (Among all users of tobacco and other products)

- 71%** of current smokers smoke Cigarettes
- 23%** are solo smokers, they smoke only cigarettes
- 48%** are dual/poly users of Cigarettes

Consumption Frequency



Age of Starting Cigarette Smoking



Figures are in %

Base : Random Sample, Current users of Factory Made Cigarettes : n= 1336

C1. Of the following Tobacco products, which products are you currently consuming?

C7. Currently you are using multiple tobacco products; which one do you consume the most?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C6. How old were you when you first started smoking/consuming tobacco regularly?

Usage at a glance : Cigarettes (2/2)

Cigarettes				
Profile	% of Cig. Smokers	Average Age of starting Cig. smoking	% of daily smokers (Among the current users of Cig.)	Average monthly spend on Cig. (Pounds)
All Current users of tobacco/other products	71	17	73	118
Men (n: 892)	72	17	76	106
Women (n: 990)	70	18	71	128
18-24 yrs (n: 254)	72	17	52	72
25-35yrs (n: 581)	79	17	71	88
36-50yrs (n: 556)	71	18	77	132
51- 69 yrs (n: 491)	61	17	85	171
Rural (n: 202)	62	16	75	115
Small Town (n: 384)	63	17	72	124
Large Town (n: 1290)	75	18	74	116

Figures are in %

Base : Random Sample, Current users: n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

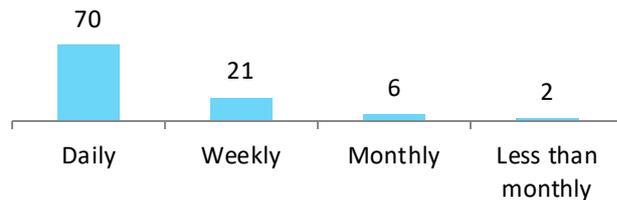
Usage at a glance : Rolled cigarettes (1/2)

Rolled Cigarettes

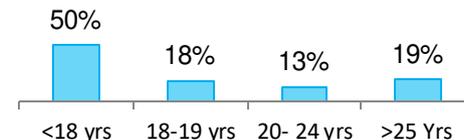
Current Usage (Among all users of tobacco and other products)

- 39%** of current smokers smoke Rolled Cigarettes
- 10%** are solo smokers, they smoke only Rolled cigarettes
- 29%** are dual/poly users of Rolled cigarettes

Consumption Frequency



Age of Starting Rolled Cigarette Smoking



≥ in %

Dom Sample, Current users of Rolled Cigarettes : n= 739

following Tobacco products, which products are you currently consuming?
select the option that best describes how often you consume 'List Tobacco Product'?
d were you when you first started smoking/consuming tobacco regularly?

Usage at a glance : Rolled cigarettes (2/2)

Rolled Cigarettes				
	% of Rolled Cig. Smokers	Average Age of starting Rolled Cig. smoking	% of daily smokers (Among the current users of Rolled Cig.)	Average monthly spend on Rolled Cig.(Pounds)
All Current users of tobacco/other products	39	19	70	60
Men (n: 892)	40	18	74	60
Women (n: 990)	38	20	66	64
18-24 yrs (n: 254)	59	17	62	60
25-35yrs (n: 581)	38	17	61	56
36-50yrs (n: 556)	38	20	75	64
51- 69 yrs (n: 491)	32	22	86	68
Rural (n: 202)	40	20	74	60
Small Town (n: 384)	37	19	72	72
Large Town (n: 1290)	40	19	69	60

Figures are in %

Base : Random Sample, current users n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

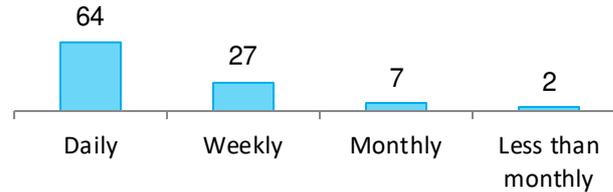
Usage at a glance : Electronic cigarettes/vaping devices with nicotine (1/2)

Electronic cigarettes/vaping devices with nicotine

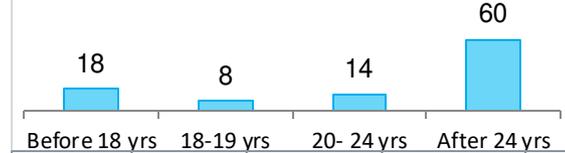
Current Usage (Among all users of tobacco and other products)

- 38%** of current users use Electronic cigarettes/vaping devices with Nicotine
- 6%** are solo users, use only E-Cig/ Vaping devices with Nicotine
- 32%** are dual/poly users of E-Cig/ Vaping devices with Nicotine

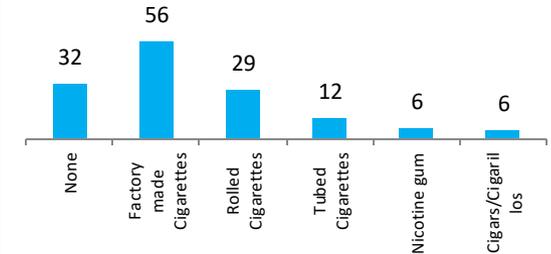
Consumption Frequency



Age of starting E-Cig/vaping devices with Nicotine vaping



What product were you consuming prior to E-Cigarettes?



± in %

Dom Sample, Current users of E-cigarettes/ vaping devices with Nicotine : n= 706

following Tobacco products, which products are you currently consuming?

select the option that best describes how often you consume 'List Tobacco Product'?

When were you first started smoking/consuming tobacco regularly?

When consuming another tobacco product prior to ...product? C8.5. What product were you consuming prior toproduct?

Usage at a glance : Electronic cigarettes/vaping devices with nicotine (2/2)

Electronic cigarettes/vaping devices with nicotine				
	% of E-Cig/Vaping devices with nicotine users	Average Age of starting of E-Cig/Vaping devices with nicotine vaping	% of daily of E-Cig/Vaping devices with nicotine vaping	Average Monthly Spend on E-Cig/Vaping devices with nicotine users (Pounds)
All Current users of tobacco/other products	38	31	64	40
Men (n: 892)	40	30	65	40
Women (n: 990)	36	31	63	40
18-24 yrs (n: 254)	40	18	53	52
25-35yrs (n: 581)	41	22	62	40
36-50yrs (n: 556)	39	34	71	40
51- 69 yrs (n: 491)	30	48	66	36
Rural (n: 202)	33	33	76	28
Small Town (n: 384)	36	33	61	32
Large Town (n: 1290)	39	30	64	44

Figures are in %

Base : Random Sample, current users n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

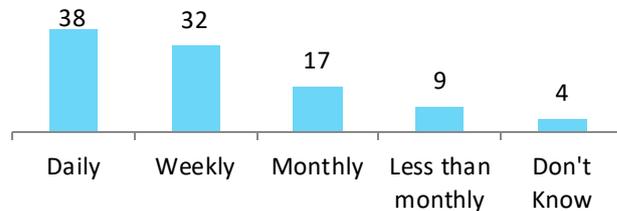
Usage at a glance : Flavored Cigarettes (1/2)

Flavored Cigarettes

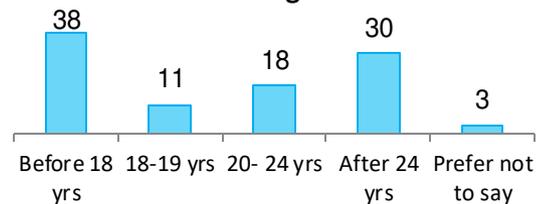
Current Usage (Among all users of tobacco and other products)

- 20%** of current smokers smoke Flavored Cigarettes
- 1%** are solo smokers, they smoke only Flavored cigarettes
- 19%** are dual/poly users of Flavored cigarettes

Consumption Frequency



Age of Starting Flavored Cigarette Smoking



es are in %

Random Sample, Current users of Flavored Cigarettes : n= 382

the following Tobacco products, which products are you currently consuming?

ease select the option that best describes how often you consume 'List Tobacco Product'?

ow old were you when you first started smoking/consuming tobacco regularly?

Usage at a glance : Flavored Cigarettes (2/2)

Flavored Cigarettes				
	% of Flavored Cig. Smokers	Average Age of starting Flavored Cig. smoking	% of daily smokers (Among the current users of Flavored Cig.)	Average monthly spend on Flavored Cig.(Pounds)
All Current users of tobacco/other products	20	22	38	56
Men (n: 892)	23	20	41	76
Women (n: 990)	18	24	34	32
18-24 yrs (n: 254)	32	17	35	36
25-35yrs (n: 581)	30	18	38	76
36-50yrs (n: 556)	16	26	41	52
51- 69 yrs (n: 491)	8	41	38	32
Rural (n: 202)	21	23	56	40
Small Town (n: 384)	18	24	30	152
Large Town (n: 1290)	21	21	37	36

Figures are in %

Base : Random Sample, current users n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted in monthly spend

Usage at a glance : Tubed Cigarettes (1/2)

Tubed Cigarettes

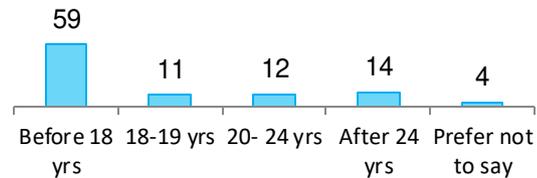
Current Usage (Among all users of tobacco and other products)

- 14%** of current smokers smoke Tubed Cigarettes
- 1%** are solo smokers, they smoke only Tubed cigarettes
- 13%** are dual/poly users of Tubed cigarettes

Consumption Frequency



Age of Starting Tubed Cigarette Smoking



Percentages are in %

Source: Random Sample, Current users of Tubed Cigarettes : n= 266

Of the following Tobacco products, which products are you currently consuming?
Please select the option that best describes how often you consume 'List Tobacco Product'.
How old were you when you first started smoking/consuming tobacco regularly?

Usage at a glance : Tubed Cigarettes (2/2)

Tubed Cigarettes				
	% of Tubed Cig. Smokers	Average Age of starting Tubed Cig. smoking	% of daily smokers (Among the current users of Tubed Cig.)	Average monthly spend on Tubed Cig.(Pounds)
All Current users of tobacco/other products	14	17	64	44
Men (n: 892)	20	16	65	40
Women (n: 990)	9	20	62	52
18-24 yrs (n: 254)	17	17	52	44
25-35yrs (n: 581)	24	15	59	36
36-50yrs (n: 556)	11	18	58	44
51- 69 yrs (n: 491)	6	28	71	88
Rural (n: 202)	12	15	52	48
Small Town (n: 384)	9	21	67	60
Large Town (n: 1290)	16	17	65	40

Figures are in %

Base : Random Sample, current users n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

Usage at a glance : Electronic cigarettes/vaping devices without nicotine (1/2)

Electronic cigarettes/vaping devices without nicotine

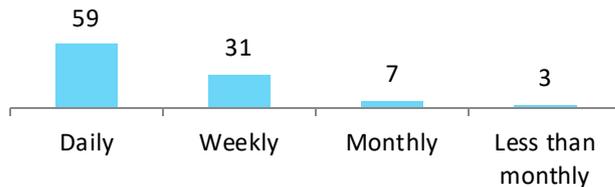
Current Usage (Among all users of tobacco and other products)

14% of current users use Electronic cigarettes/vaping devices without nicotine

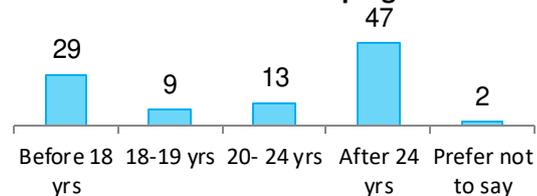
1% are solo users, use only E-Cig/ Vaping devices

13% are dual/poly users

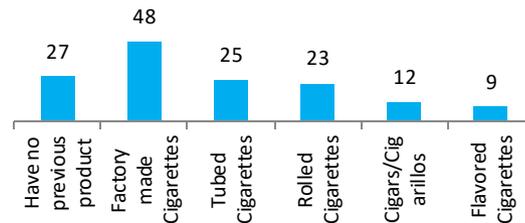
Consumption Frequency



Age of Starting E-Cig/ Vaping devices without Nicotine vaping



What product were you consuming prior to E-Cig/ Vaping devices without Nicotine?



Percentages are in %

Source: Random Sample, Current users of E-Cigarettes/ Vaping devices without nicotine : n= 261

Question: Of the following Tobacco products, which products are you currently consuming?

Question: Please select the option that best describes how often you consume 'List Tobacco Product'?

Question: How old were you when you first started smoking/consuming tobacco regularly?

Question: Were you consuming another tobacco product prior to ...product? C8.5. What product were you consuming prior toproduct?

Usage at a glance : Electronic cigarettes/vaping devices without nicotine (2/2)

Electronic cigarettes/vaping devices without nicotine				
	% of E-Cig/Vaping devices without nicotine users	Average Age of starting of E-Cig/Vaping devices without nicotine vaping	% of daily of E-Cig/Vaping devices without nicotine users	Average weekly spend on the product (Pounds)
All Current users of tobacco/other products	14	27	59	40
Men (n: 892)	15	24	63	40
Women (n: 990)	13	30	55	36
18-24 yrs (n: 254)	20	16	42	40
25-35yrs (n: 581)	20	20	59	40
36-50yrs (n: 556)	10	31	69	36
51- 69 yrs (n: 491)	8	51	65	40
Rural (n: 202)	12	24	76	28
Small Town (n: 384)	10	31	45	32
Large Town (n: 1290)	15	26	60	44

Figures are in %

Base : Random Sample, current users n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

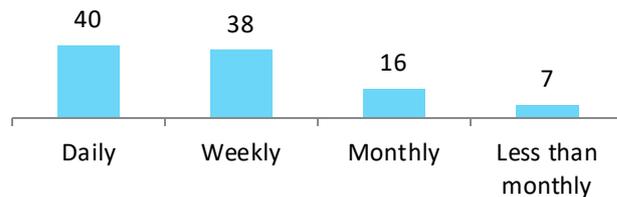
Usage at a glance : Nicotine Gum (1/2)

Nicotine Gum

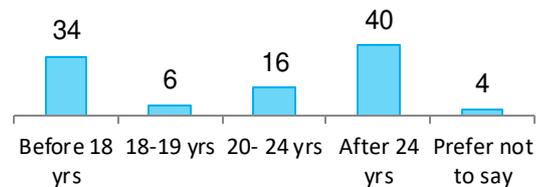
Current Usage (Among all users of tobacco and other products)

- 9% of current smokers use Nicotine Gum
- 0% are solo smokers, they use only Nicotine Gum
- 9% are dual/poly users of Nicotine Gum

Consumption Frequency



Age of starting using Nicotine Gum



Percentages are in %

Source: Random Sample, Current users of Nicotine Gum: n= 165

Question: Of the following Tobacco products, which products are you currently consuming?
Please select the option that best describes how often you consume 'List Tobacco Product'.
How old were you when you first started smoking/consuming tobacco regularly?

Usage at a glance : Nicotine Gum (2/2)

Nicotine Gum				
	% of Nicotine Gum users	Average Age of starting using Nicotine Gum	% of daily users (Among the current users of Nicotine Gum)	Average monthly spend on Nicotine Gum (Pounds)
All Current users of tobacco/other products	9	23	40	36
Men (n: 892)	11	22	40	40
Women (n: 990)	7	26	40	32
18-24 yrs (n: 254)	12	17	30	32
25-35yrs (n: 581)	10	18	47	28
36-50yrs (n: 556)	8	26	43	56
51- 69 yrs (n: 491)	5	43	26	28
Rural (n: 202)	5	Very Low Base (below 15)		
Small Town (n: 384)	8	28	19	24
Large Town (n: 1290)	10	23	44	44

Figures are in %

Base : Random Sample, current users n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

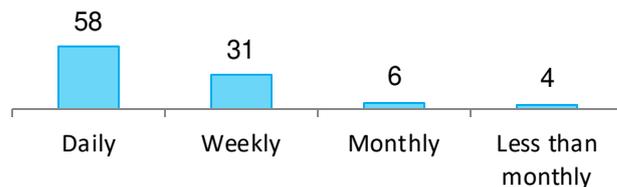
Usage at a glance : Heat-not-burn products (1/2)

Heat-not-burn Products

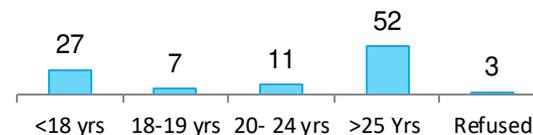
Current Usage (Among all users of tobacco and other products)

- 6%** of current users use Heat-not- burn products
- 0.2%** are solo users, they use only Heat-not- burn products
- 5.8%** are dual/poly users of Heat-not- burn products

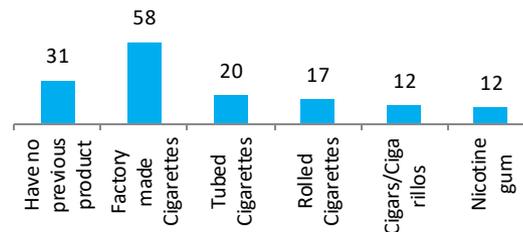
Consumption Frequency



Age of starting using HNB



What product were you consuming prior to Heat not burn products?



in %

im Sample, Current users of Heat-not burn products: n= 105

llowing Tobacco products, which products are you currently consuming?

lect the option that best describes how often you consume 'List Tobacco Product'?

ere you when you first started smoking/consuming tobacco regularly?

u consuming another tobacco product prior to ...product? C8.5. What product were you consuming prior toproduct?

Usage at a glance : Heat-not-burn products (2/2)

Heat-not-burn products				
	% of Heat-not-burn products users	Average Age of starting Heat-not-burn products users	% of daily users (Among the current users of Heat-not-burn products.)	Average monthly spend on Heat-not-burn products (Pounds)
All Current users of tobacco/other products	6	26	58	60
Men (n: 892)	7	25	56	48
Women (n: 990)	4	27	61	76
18-24 yrs (n: 254)	6	17	63	60
25-35yrs (n: 581)	8	22	60	56
36-50yrs (n: 556)	6	31	56	68
51- 69 yrs (n: 491)	1	Very Low Base (below 15)		
Rural (n: 202)	0			
Small Town (n: 384)	3			
Large Town (n: 1290)	7	25	60	64

Figures are in %

Base : Random Sample, current users n= 1882

C1. Of the following Tobacco products, which products are you currently consuming?

C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

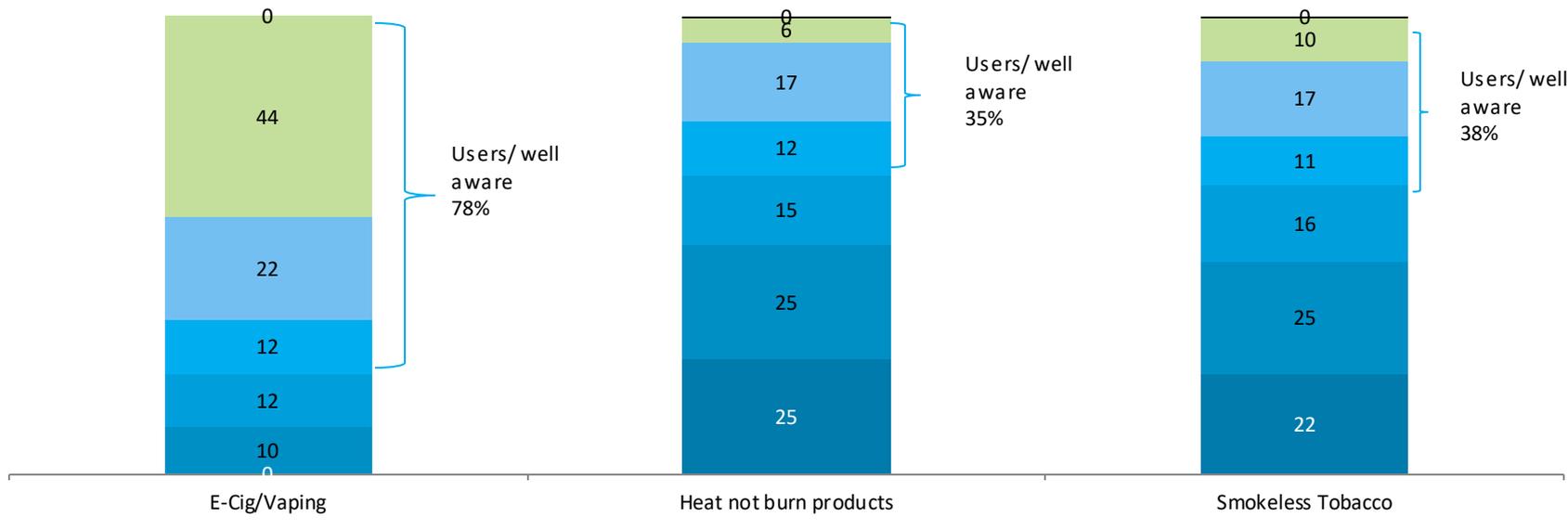
C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

Usage and familiarity of E-Cig, Heat-not-burn and Smokeless tobacco products

78% of current users of tobacco/ other products are either users of E-Cig or well aware/know a fair amount about E-Cig.

2. How familiar are you with the following products ..(asked only to the non-users of the products)

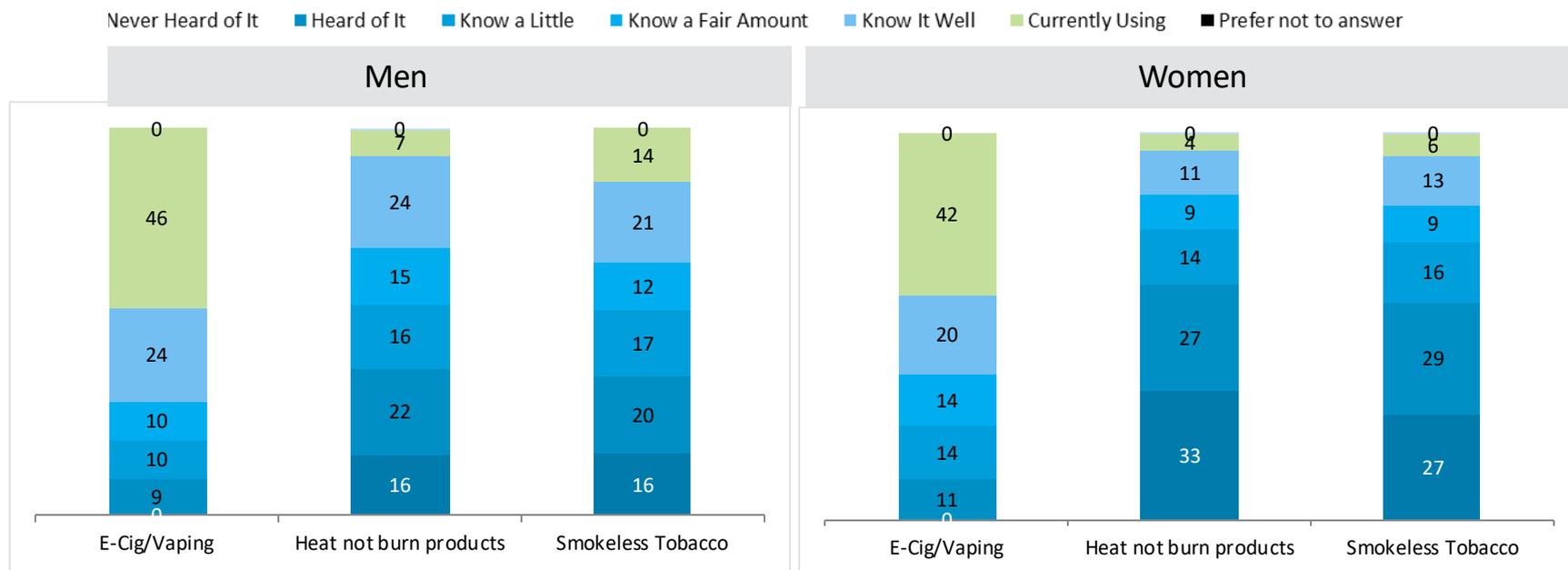
■ Never Heard of It
 ■ Heard of It
 ■ Know a Little
 ■ Know a Fair Amount
 ■ Know It Well
 ■ Currently Using
 ■ Prefer not to answer



Usage and familiarity of E-Cig, Heat-not-burn and Smokeless tobacco products

38% of Women smokers/ current users never heard of Heat-not-burn products.

C2. How familiar are you with the following products ..(asked only to the non-users of the products)



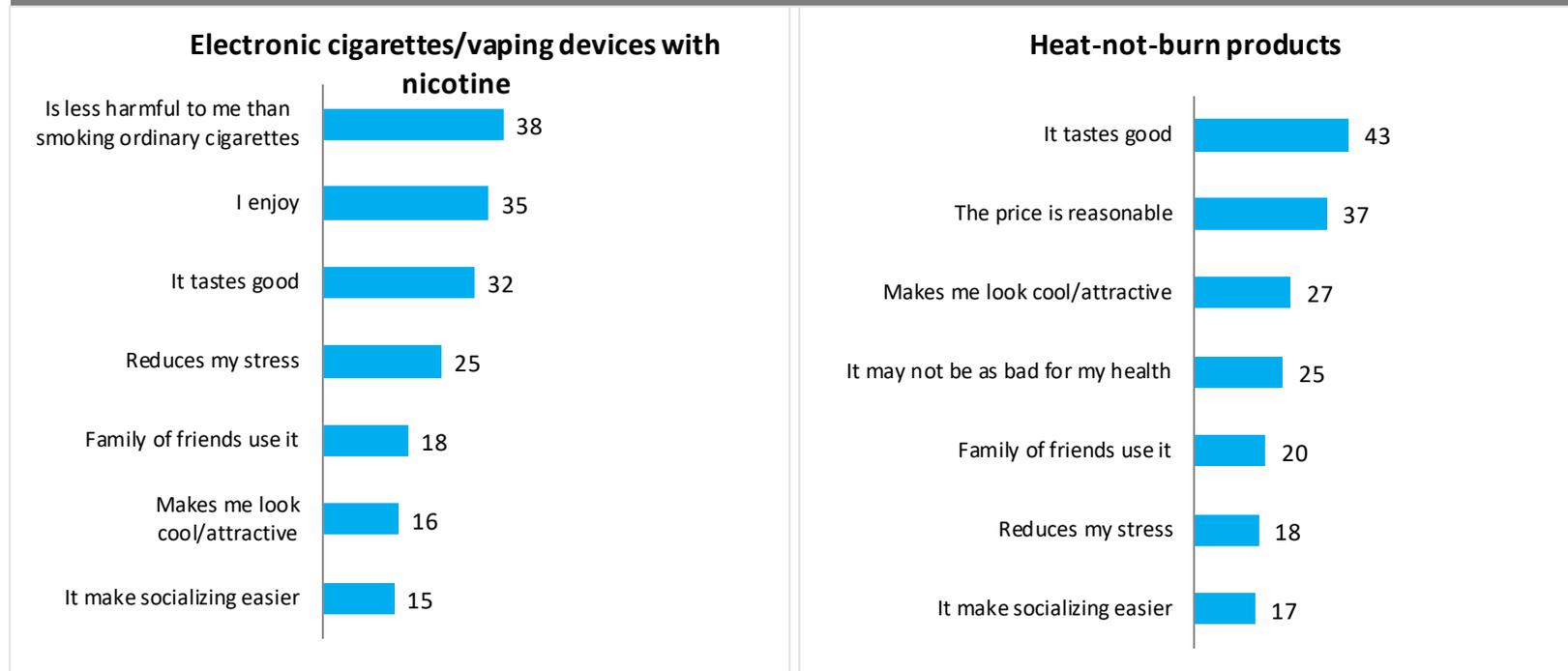
in %

lom Sample, Current Users of tobacco products/ other products Men : n = 892 Women : n = 990

Reasons for start using E-Cig and Heat-not-burn products

As taste and less harmful than ordinary cigarettes are the common reasons to start using these products.

C9/ C9.5. Which of the following are reasons that you switched to/ started using



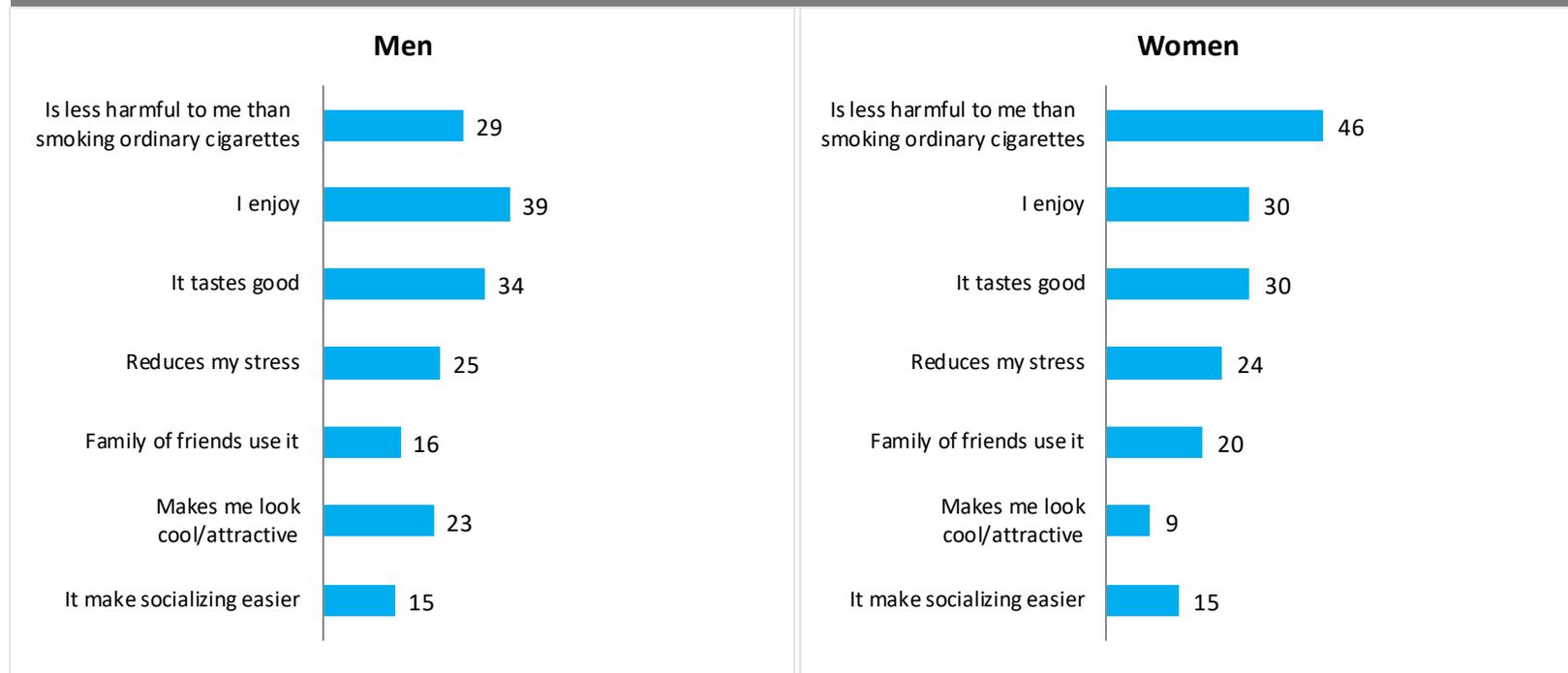
Values are in %

Random Sample, Current users of E-Cig/ Vaping devices : n= 828 Current users of Heat-not-burn products : n=105

Reasons for start using Electronic cigarettes/vaping devices

Among women, less harmful is the major reason to start using E-Cigarettes, whereas, among men, it is the good taste of these products.

C9/ C9.5. Which of the following are reasons that you switched to/ started using



Figures are in %

Base : Random Sample, Current users of E-Cig/ Vaping devices Men : n=414 Women : n=414

Reasons for start using Heat-not-burn products

Among both men and women, the good taste of Heat-not-burn products is the common reason to start using these products.

C9/ C9.5. Which of the following are reasons that you switched to/ started using



Figures are in %

Base : Random Sample, Current users of Heat-not-burn products Men : n=61 Women : n=44

Nicotine Dependence

Fagerstrom Test For Nicotine Dependence

The Fagerström Test for Nicotine Dependence is a standard instrument for assessing the intensity of physical addiction to nicotine.

The test was designed to provide an ordinal measure of nicotine dependence related to cigarette smoking. It contains six items that evaluate the quantity of cigarette consumption, the compulsion to use, and dependence.

In scoring the Fagerstrom Test for Nicotine Dependence, yes/no items are scored from 0 to 1 and multiple-choice items are scored from 0 to 3. The items are summed to yield a total score of 0-10. The higher the total Fagerström score, the more intense is the patient's physical dependence on nicotine.*

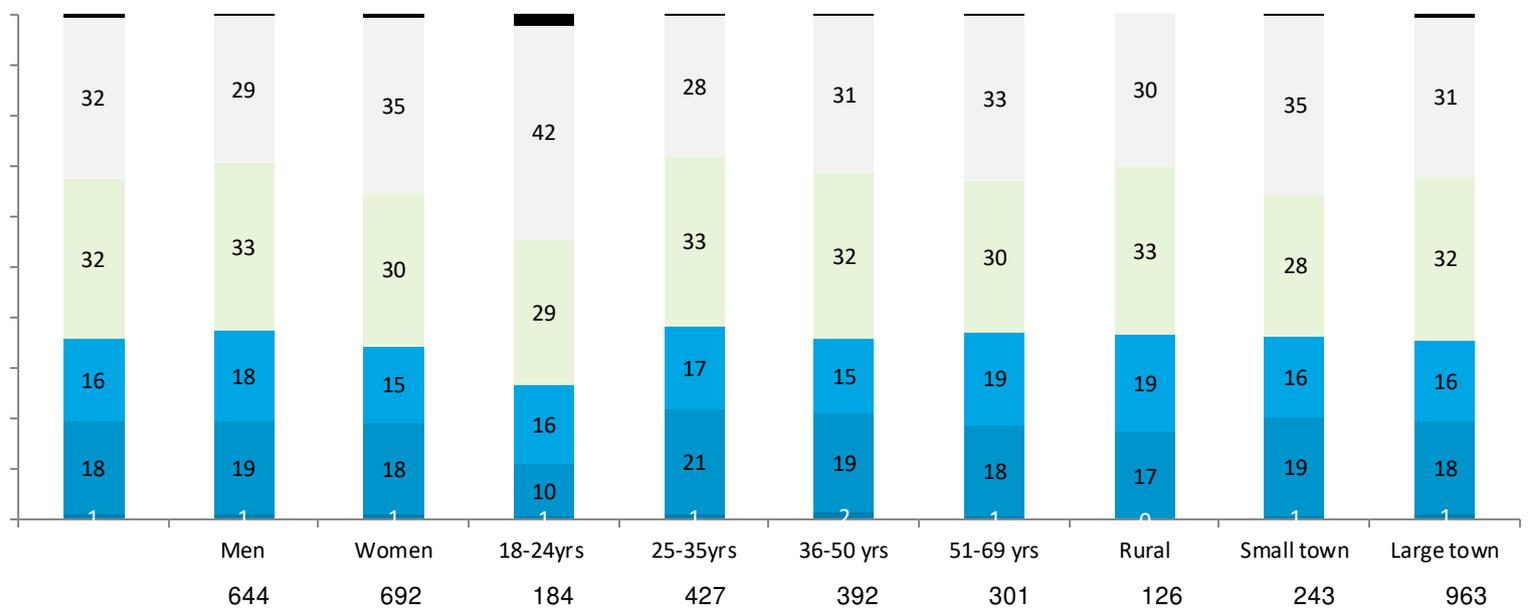
How to calculate Fagerstrom score**

PLEASE TICK (✓) ONE BOX FOR EACH QUESTION		
How soon after waking do you smoke your first cigarette?	Within 5 minutes	<input type="checkbox"/> 3
	6-30 minutes	<input type="checkbox"/> 2
	31-60 minutes	<input type="checkbox"/> 1
	After 60 minutes	<input type="checkbox"/> 0
Do you find it difficult to refrain from smoking in places where it is forbidden? e.g. Church, Library, etc.	Yes	<input type="checkbox"/> 1
	No	<input type="checkbox"/> 0
Which cigarette would you hate to give up?	The first in the morning	<input type="checkbox"/> 1
	Any other	<input type="checkbox"/> 0
How many cigarettes a day do you smoke?	10 or less	<input type="checkbox"/> 0
	11 - 20	<input type="checkbox"/> 1
	21 - 30	<input type="checkbox"/> 2
	31 or more	<input type="checkbox"/> 3
Do you smoke more frequently in the morning?	Yes	<input type="checkbox"/> 1
	No	<input type="checkbox"/> 0
Do you smoke even if you are sick in bed most of the day?	Yes	<input type="checkbox"/> 1
	No	<input type="checkbox"/> 0
Total Score		

Classification of dependence:

- 0-2 Very low
- 3-4 Low
- 5 Moderate
- 6-7 High
- 8-10 Very high

Nicotine Dependency : Cigarettes



Indicative* Nicotine Dependency : By products

Similar level of nicotine dependency noticed across current users of various tobacco products/ other products.

Indicative nicotine dependency among current smokers of various tobacco/other products..								
	Current users of...							
	Cigarettes	Rolled cigarettes	Electronic cigarettes/vaping devices with nicotine	Flavored cigarettes	Tubed cigarettes	Electronic cigarettes/vaping devices without nicotine	Nicotine gum	Heat-not-burn products
	%	%	%	%	%	%	%	%
Base : Current Users	1336	739	706	382	266	261	161	105
C.10 How soon after you wake up do you smoke your first cigarette/consume your first nicotine product?								
Within 5 minutes (3)	15	22	20	18	9	10	11	11
6-30 minutes(2)	33	30	33	25	39	29	28	30
31-60 minutes(1)	25	26	25	36	35	32	35	30
C11. Find it difficult to refrain from smoking/consuming tobacco in places where it is forbidden (1)	37	39	37	47	53	43	52	33
C12. Hate to give up the first one in the morning (1)	70	69	70	82	86	72	91	76
C14. Consume more frequently during the first hour (1)	46	50	44	58	68	50	63	51
C15. Consume even if you are ill (1)	48	55	50	56	65	51	51	46
Average Scores (1-7)	3.4	3.7	3.5	3.8	4.1	3.4	3.8	3.3

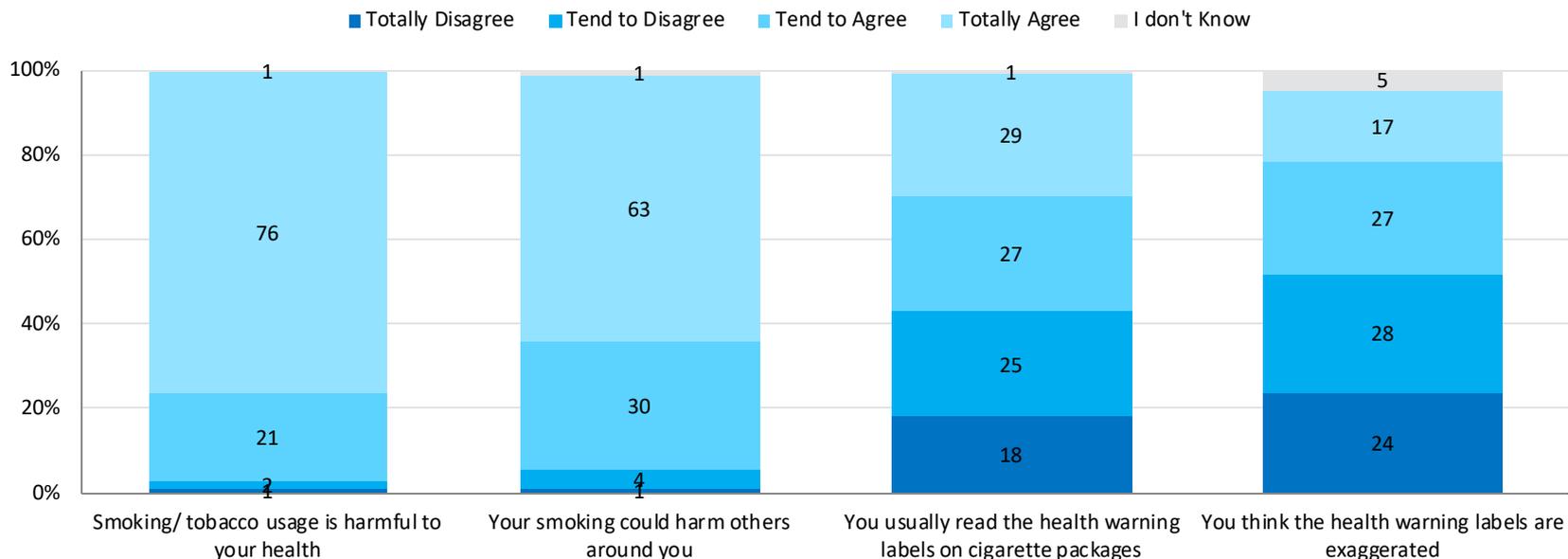
* Fagerstrom score is for cigarette smoking only; hence without the Cig. consumption/day question, scores have been calculated to give an indication of Nicotine dependency among the users of other products. However a large number of them smoke cigarettes too.

4.2 Beliefs and Perception : Among Current Users/Vapers/ Smokers

Beliefs and perceptions about smoking- Current users

Every second current user of tobacco products/ other products believes that health warning labels are exaggerated.
43% of current users/smokers/vapers do not usually read these health warning labels.

B1. Please rate to what extent do you agree with the following statements?

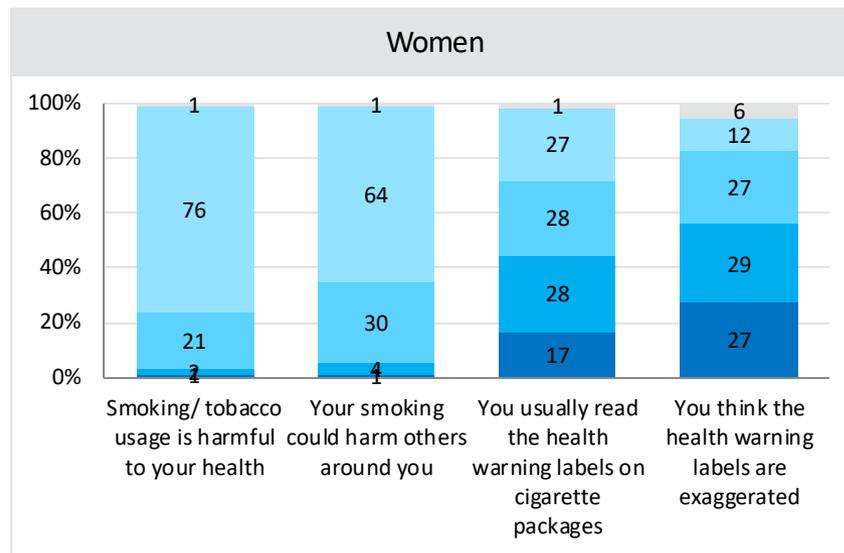
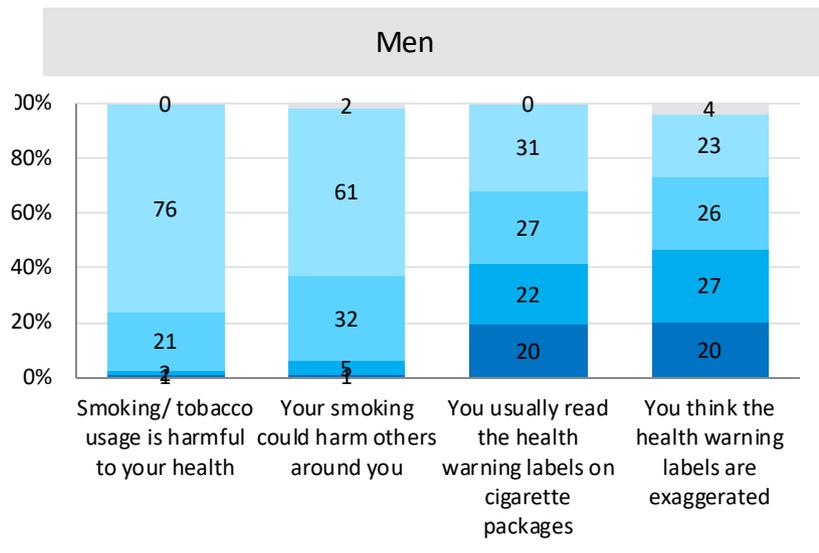


Beliefs and perceptions about smoking- Current users

For both men and women, every second current user of tobacco products/ other products believes health warning labels are exaggerated.

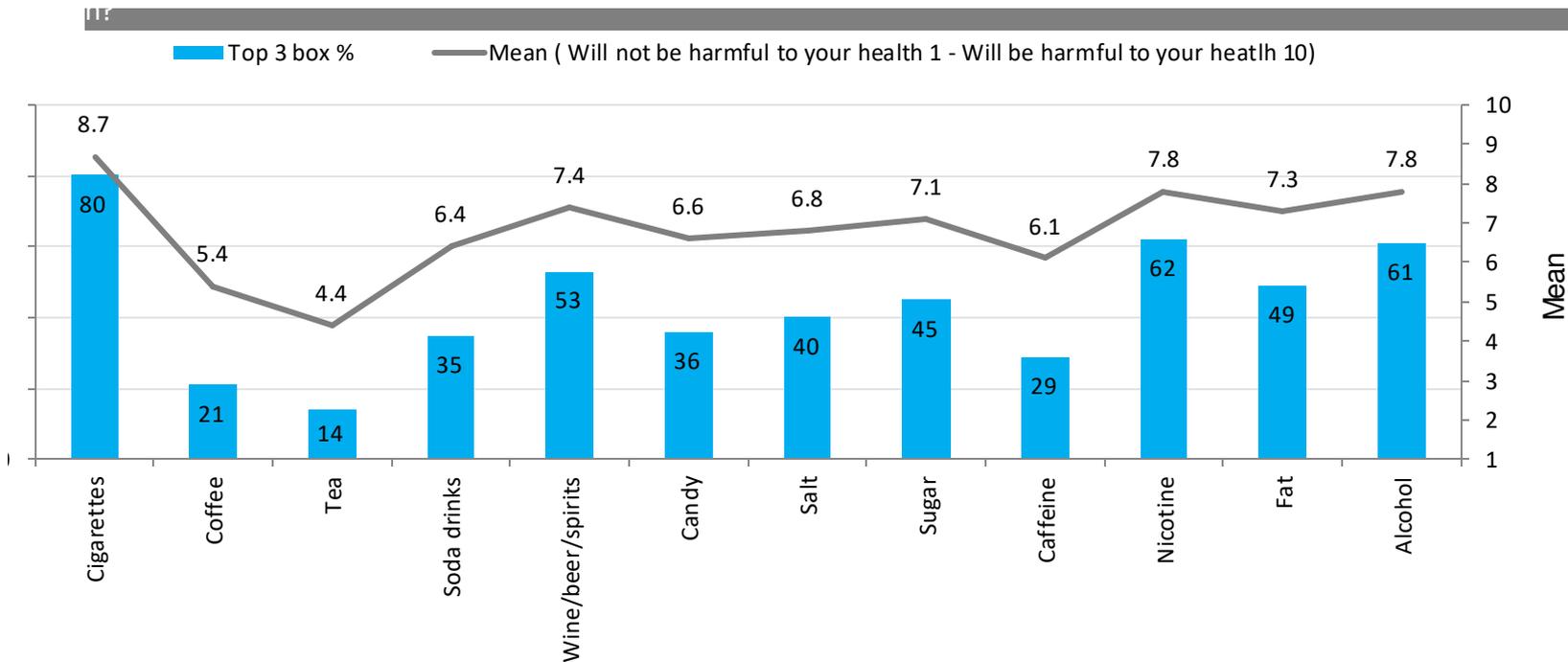
B1.Please rate to what extent do you agree with the following statements?

■ Totally Disagree ■ Tend to Disagree ■ Tend to Agree ■ Totally Agree ■ I don't Know



Risk perception comparison among various products

The majority of current users/smokers/ vapers of tobacco products/ other products, consider Cigarettes to be the most harmful product, followed by Nicotine and Alcohol.

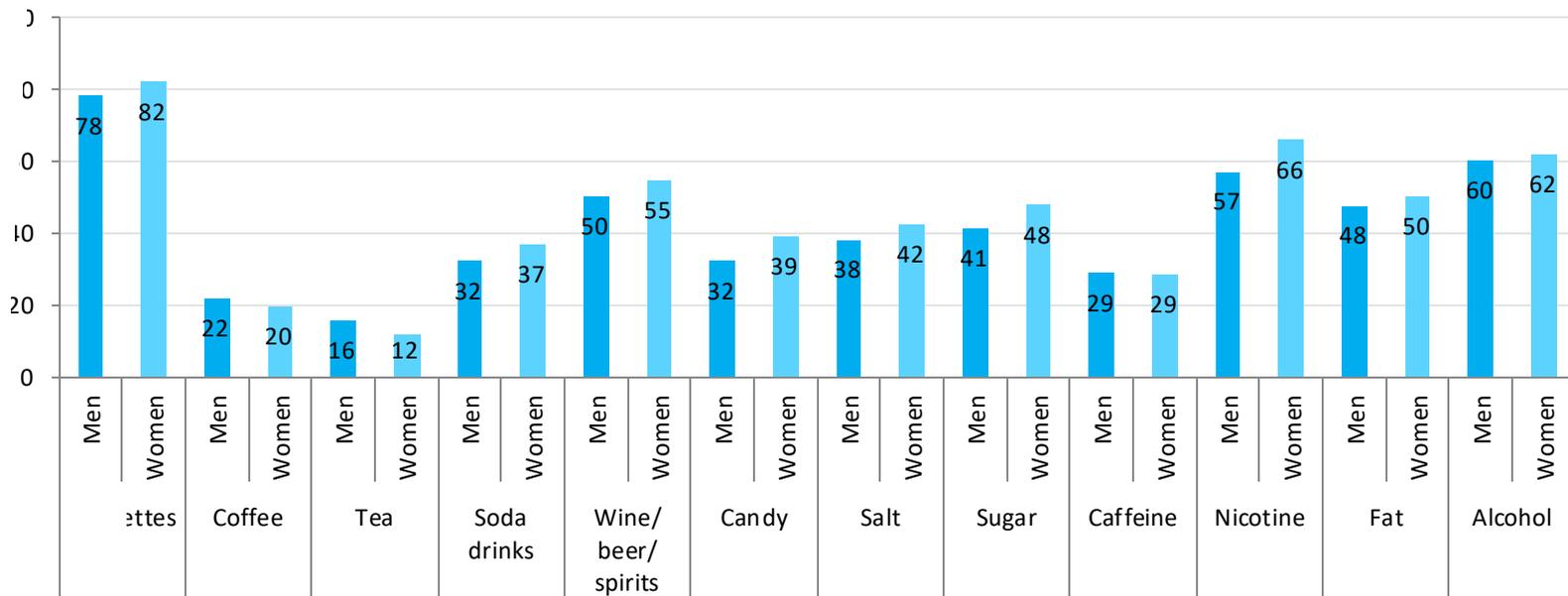


led 8, 9 or 10 on a 10 points scale (Will not be harmful to your health 1 - Will be harmful to your health 10)

nt Users of tobacco products/ other products : n=1882

Risk perception comparison among various products

Both men and women current users/vapers/smokers consider Cigarettes to be the most harmful product, followed by Nicotine and Alcohol.

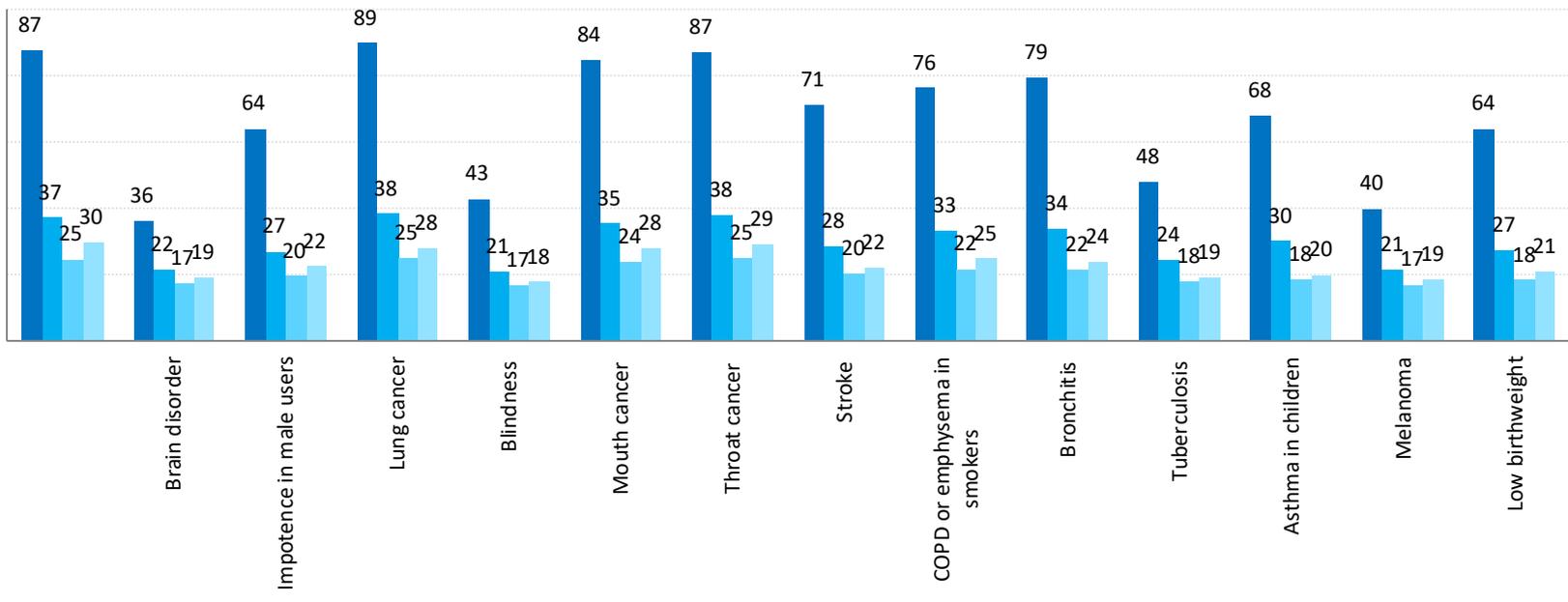


0 to 100 on a 10 points scale (Will not be harmful to your health 1 - Will be harmful to your health 10)

of tobacco products/other products Men : n=892 Women : n=990

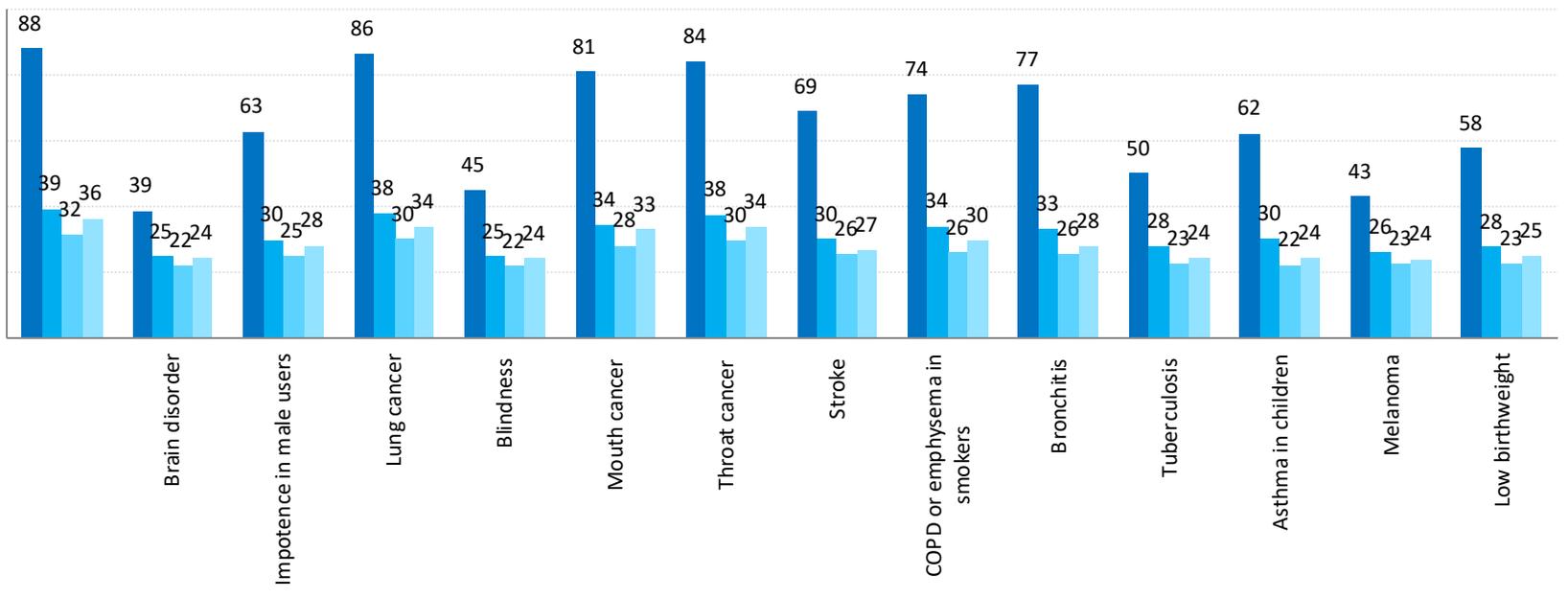
Risk perception comparison among various tobacco and other products

Heat-not-burn products have the lowest risk perception of causing diseases.



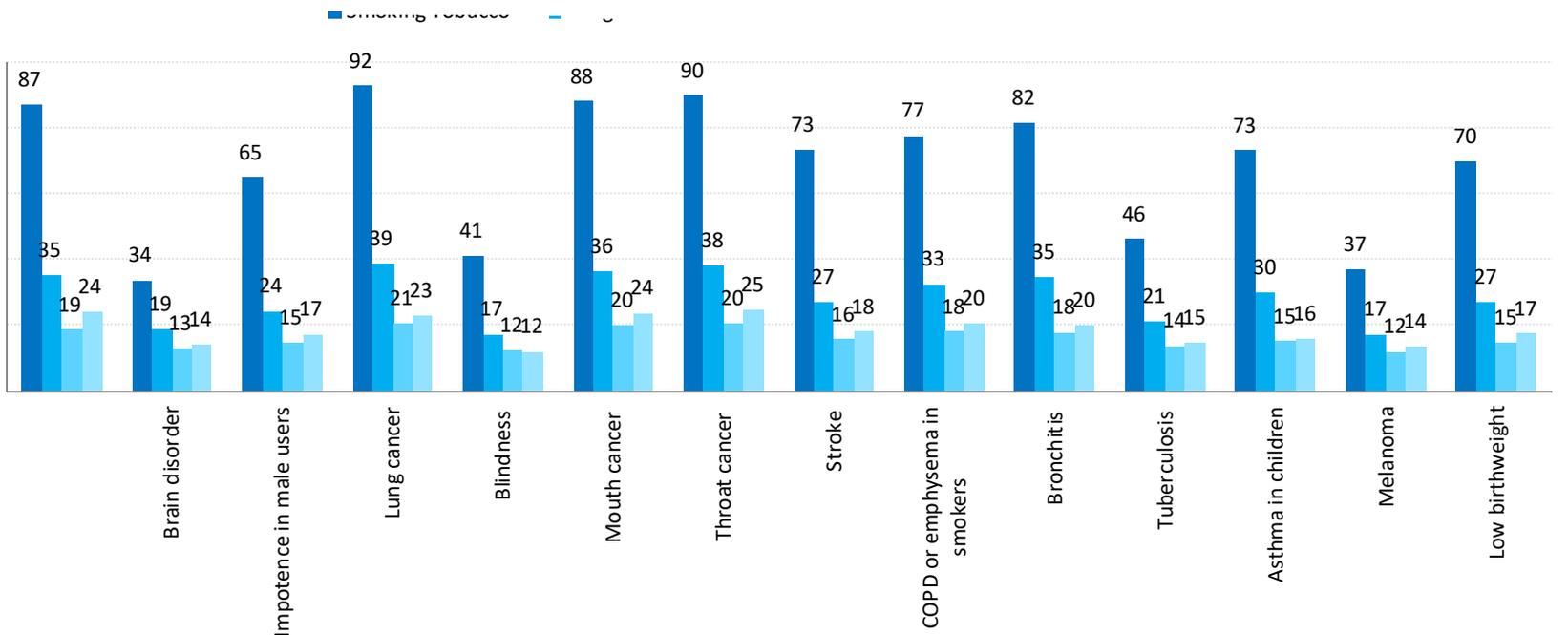
Risk perception comparison among various tobacco and other products

Among men smokers/vapers/ current users, Heat-not-burn products have the lowest risk perception of causing diseases.



Risk perception comparison among various tobacco and other products

Among Women smokers/vapers/ current users, Heat-not-burn products have the lowest risk perception of causing diseases. Low birth weight due to Cigarettes had a higher mention by women (Men: 58% Women:70%).

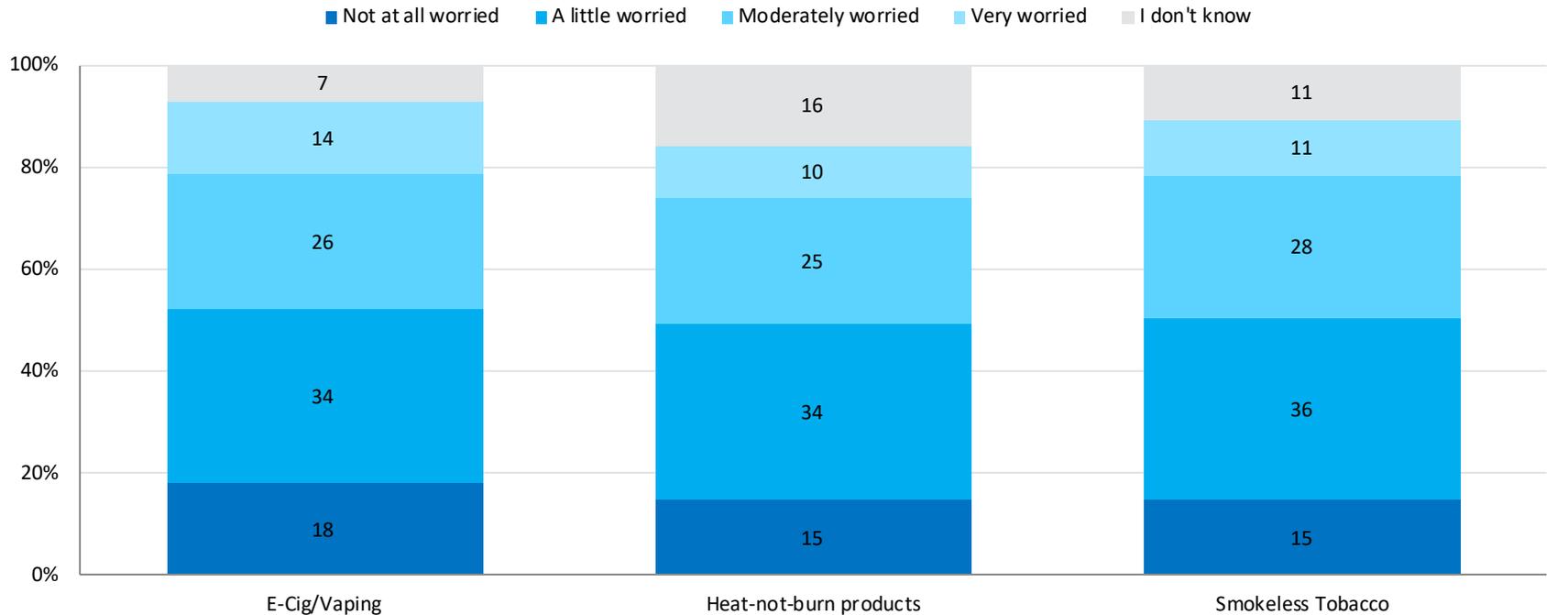


acco products/ other products : n=990

Beliefs and perceptions comparison among e-cig, HNB and Smokeless tobacco

Approximately 40% of the vapers/smokers/users of E-Cig, Heat-not-burn products & Smokeless Tobacco are not worried/ very little worried about the damage these products will cause to their health.

BB4/8.5/10.2. How worried are you that using this product will damage your health in the future?

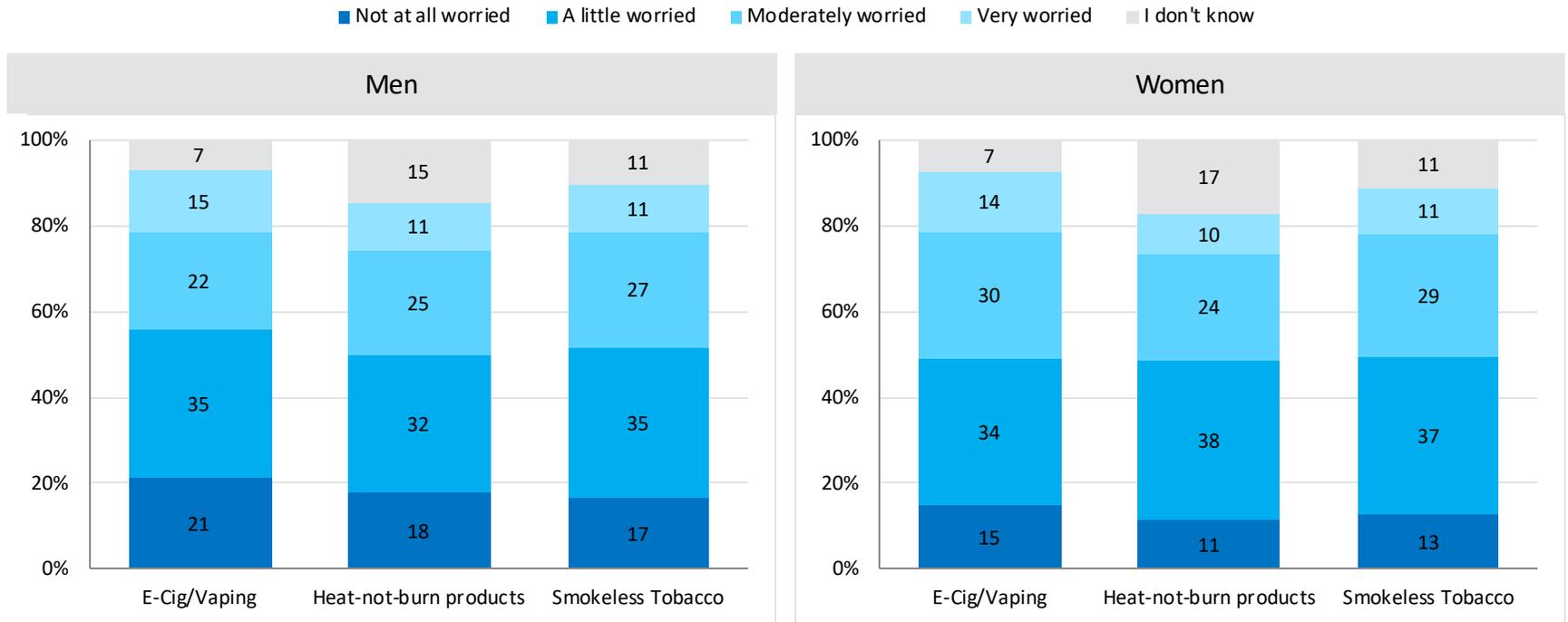


Sample, Those who are aware of the respective products: E-Cig n: 1879 Heat-not-burn products n: 1409 Smokeless tobacco n: 1467

Beliefs and perceptions comparison among e-cig, HNB and Smokeless tobacco

Among both men and women, approximately 40% of the users of E-Cig, Heat not burn products & Smokeless Tobacco are not worried/ very little worried about the damage these products will cause to their health.

B4/8.5/10.2. How worried are you that using this product will damage your health in the future?



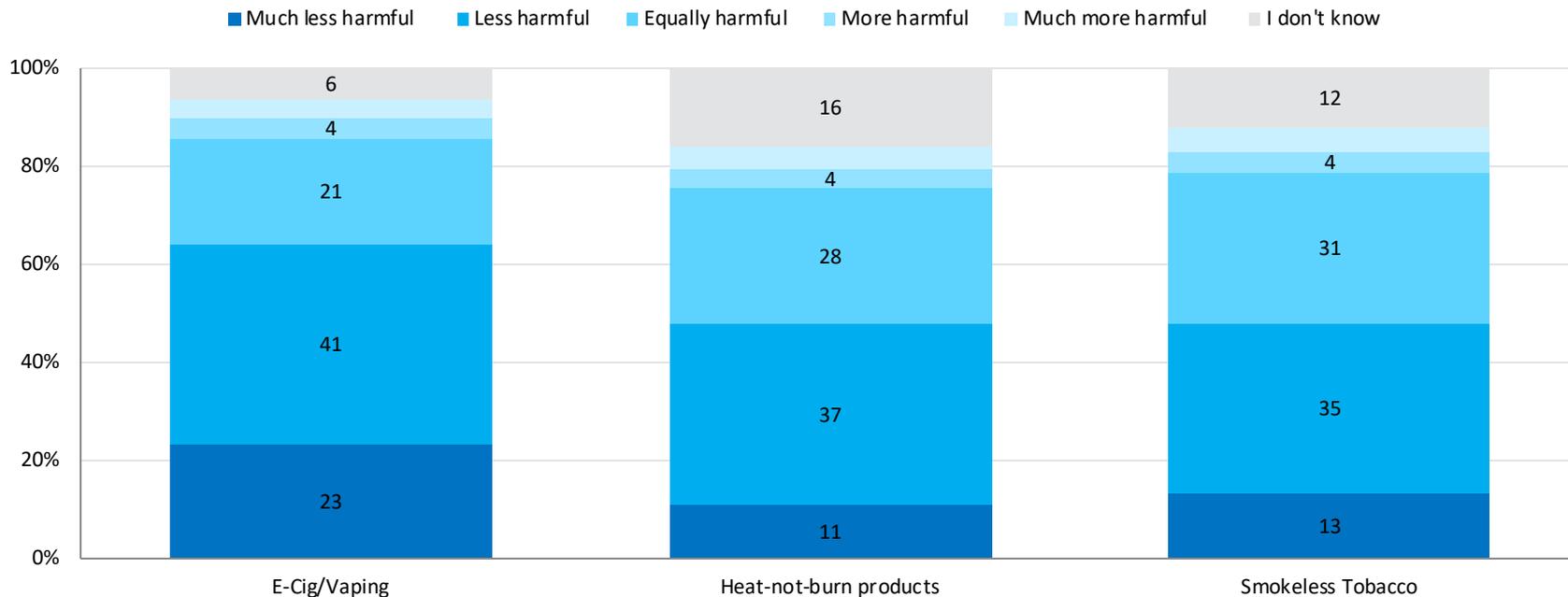
Figures are in %

Base: Random Sample, Those who are aware of the respective products: E-Cig Men: n=890 Women: n=989; Heat-not-burn products Men: n=751 Women: n=658; Smokeless tobacco Men: n=750 Women: n=71751

Beliefs and perceptions- Current users/Vapers/Smokers

The majority of current users/smokers/ vapers considers E-Cig (64%) as less harmful than Smoking tobacco. In the case of Heat-not-burn and Smokeless tobacco; more than 10% did not answer as they were not aware of it. Among the rest, the majority (48%) perceived those as less harmful than Smoking tobacco.

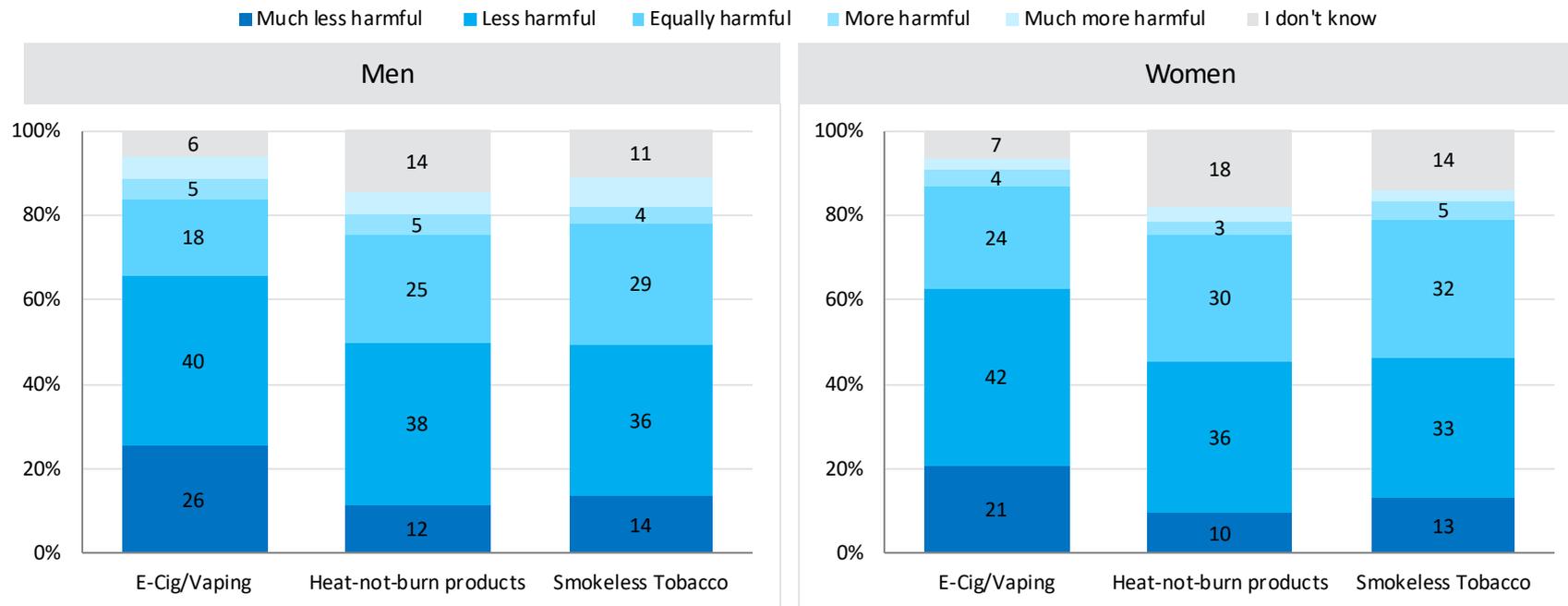
B7/B10/B10.7. Compared to smoking tobacco, would you say that this product is...?



Beliefs and perceptions- Current users/Vapers/Smokers

Among both men and women, the majority consider E-Cig, Heat-not-burn and smokeless tobacco as less harmful than smoking tobacco.

B7/B10/B10.7. Compared to smoking tobacco, would you say that this product is...?

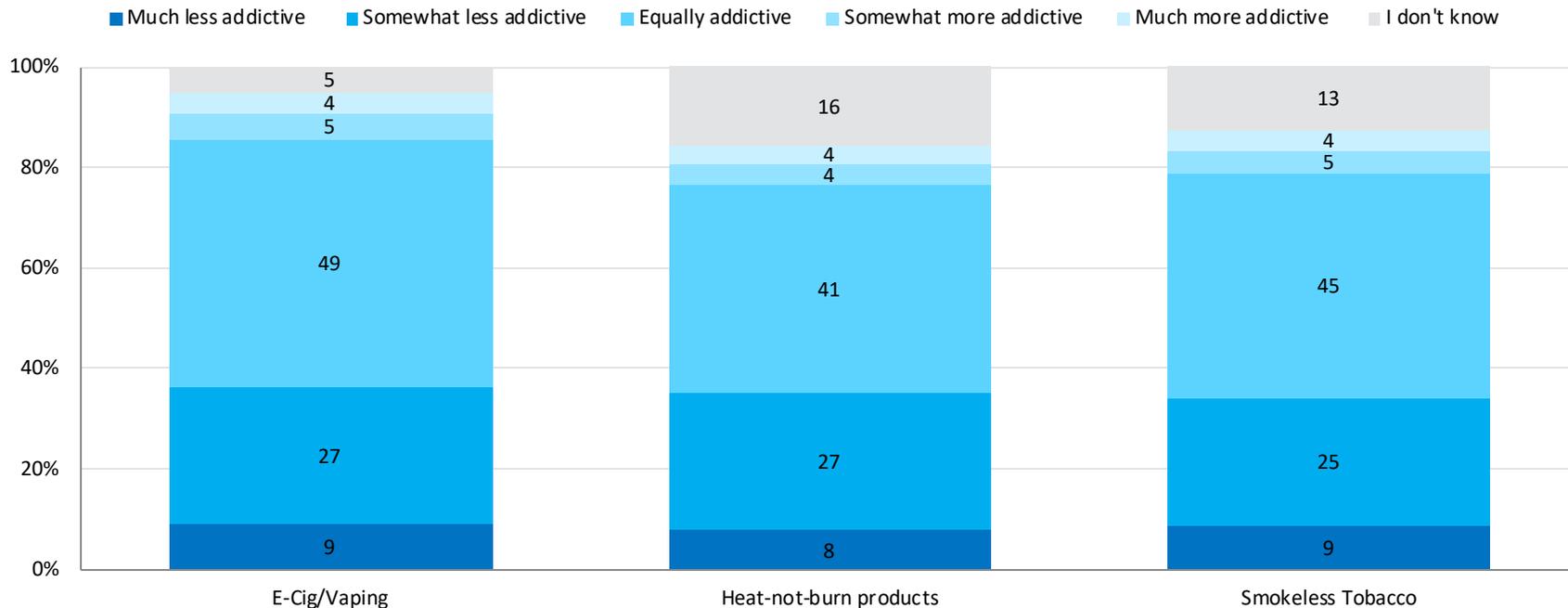


Figures are in %
 Base: Random Sample, Those who are aware of the respective products: E-Cig Men: n=890 Women: n=989; Heat-not-burn products Men: n=751 Women: n=658; Smokeless tobacco Men: n=750 Women: n=717

Beliefs and perceptions- Current users/Vapers/Smokers

Around 40%-50% of the current users of tobacco products/ other products users believe E-Cig, Heat not burn products & Smokeless Tobacco are equally addictive as smoking tobacco; however a sizeable group also opined those as less addictive than smoking tobacco; At an overall level, these are perceived as less addictive than smoking tobacco.

3/10.1/10.9. Compared to smoking tobacco, would you say using this product is...?



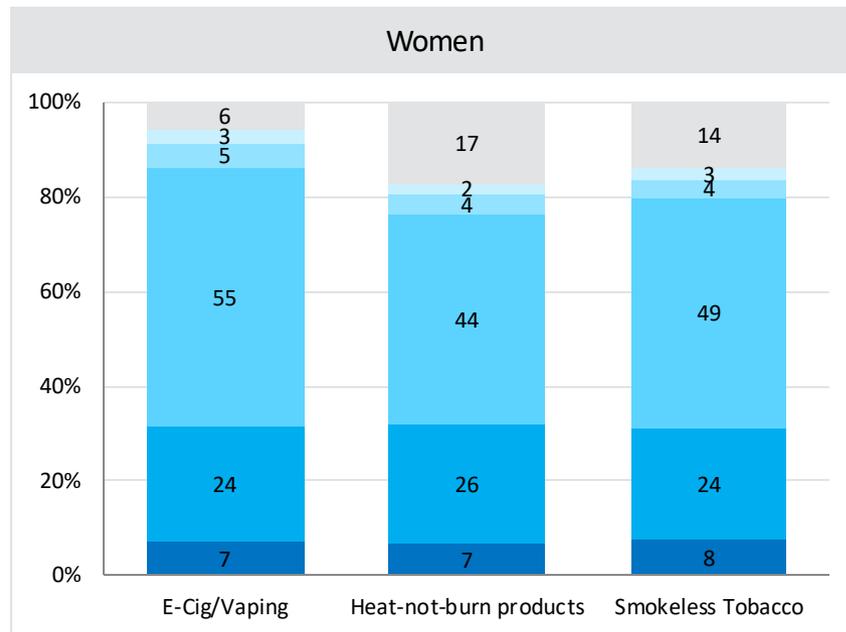
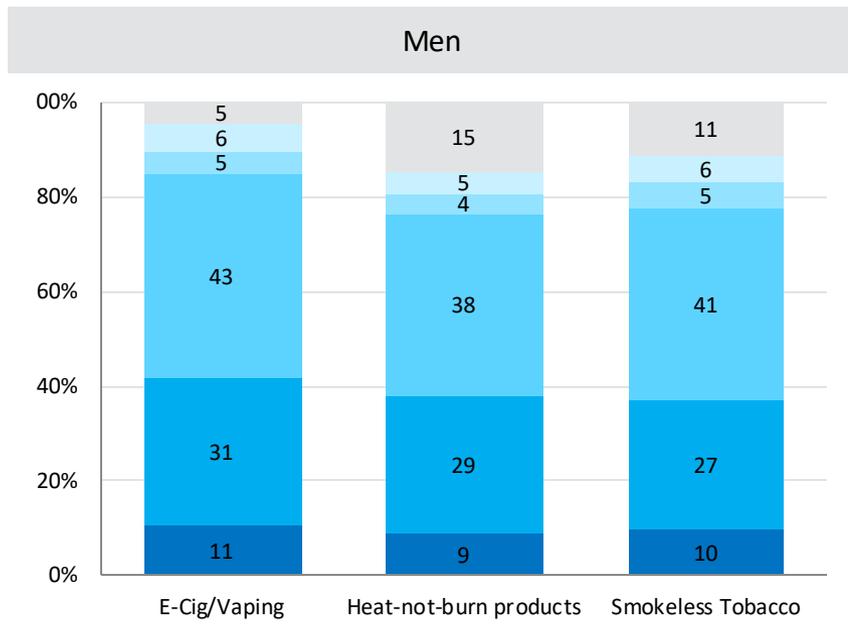
Sample, Those who are aware of the respective products: E-Cig n: 1879 Heat-not-burn products n: 1409 Smokeless tobacco n: 1467

Beliefs and perceptions- Current users/Vapers/Smokers

Among both Men and Women current users/smokers/ vapers, around 40%-50% believe E-Cig, Heat not burn products & Smokeless Tobacco are equally addictive as smoking tobacco; however a sizeable group also opined those as less addictive than smoking tobacco.

B8/10.1/10.9. Compared to smoking tobacco, would you say using this product is...?

■ Much less addictive ■ Somewhat less addictive ■ Equally addictive ■ Somewhat more addictive ■ Much more addictive ■ I don't know

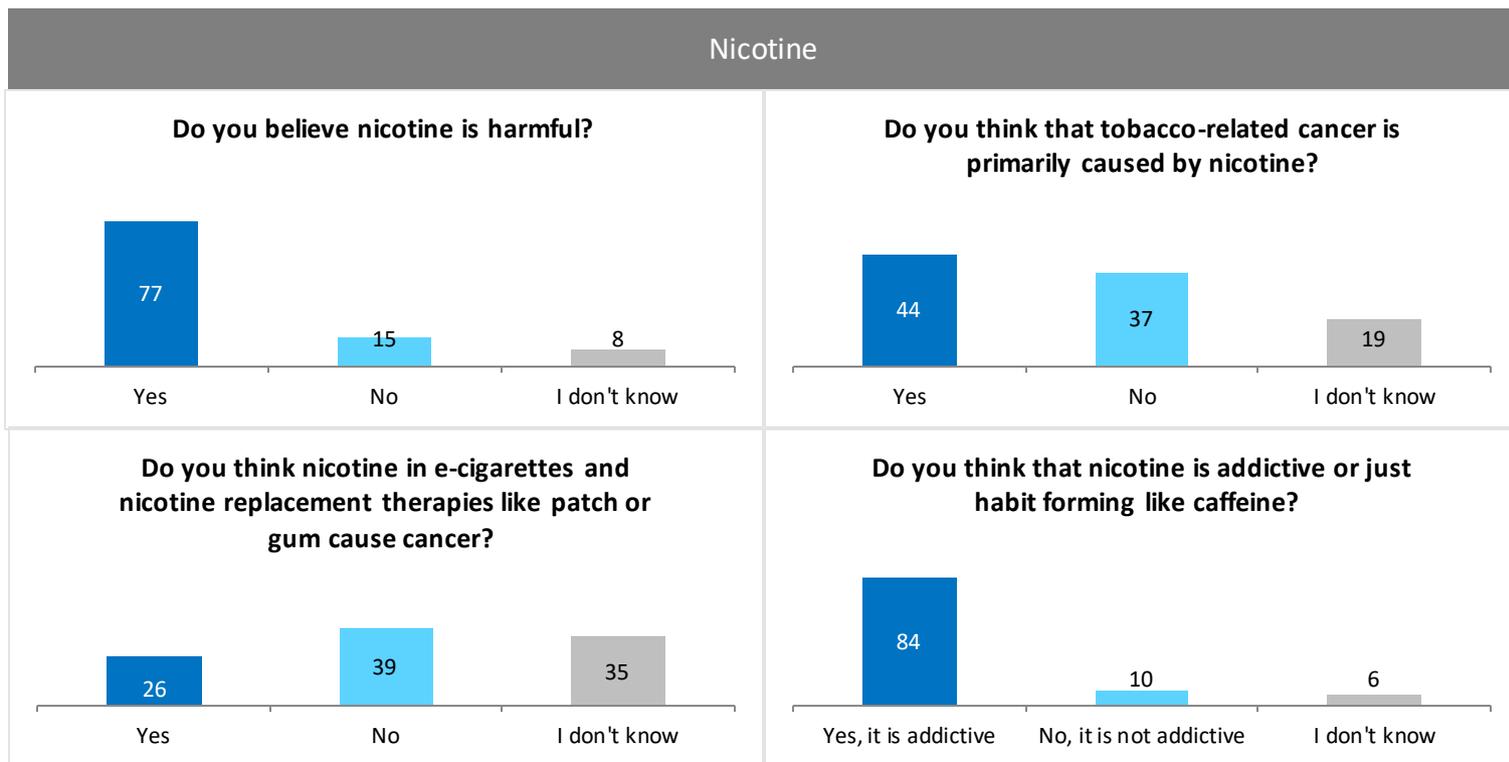


figures are in %

base : Random Sample, Those who are aware of the respective products: E – Cig Men: n=890 Women: n=989; Heat-not-burn products Men: n=751 Women: n=658; Smokeless tobacco Men: n=750 Women: n=717

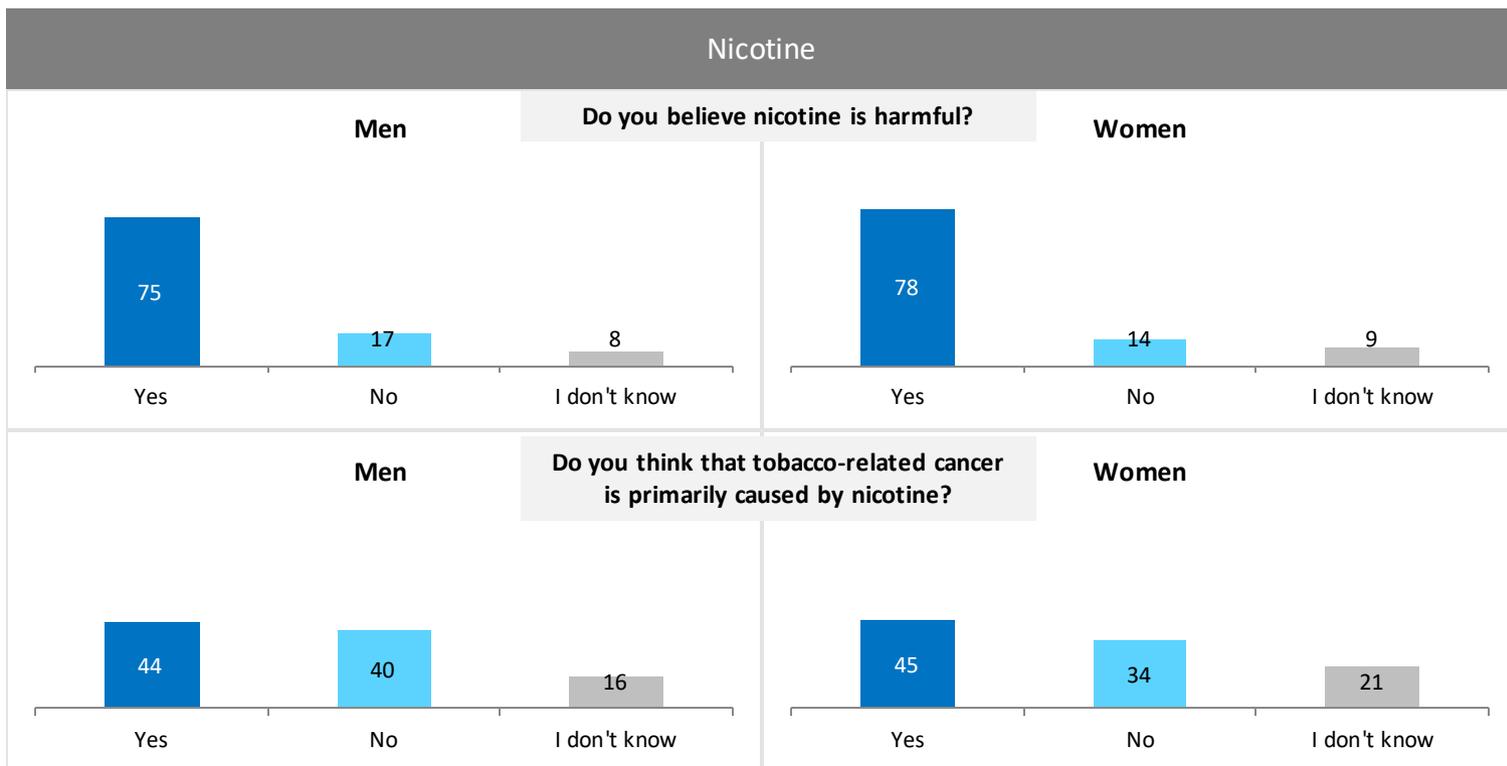
Risk perception of Nicotine - Current users/Vapers/Smokers

77% of current users of tobacco/other products believe nicotine is harmful and 44% thinking that tobacco-related cancer is primarily caused by nicotine.



Risk perception of Nicotine - Current users/Vapers/Smokers

Among both men and women current users/ vapers/smokers, the majority believes nicotine is harmful and tobacco-related cancer is primarily caused by nicotine.

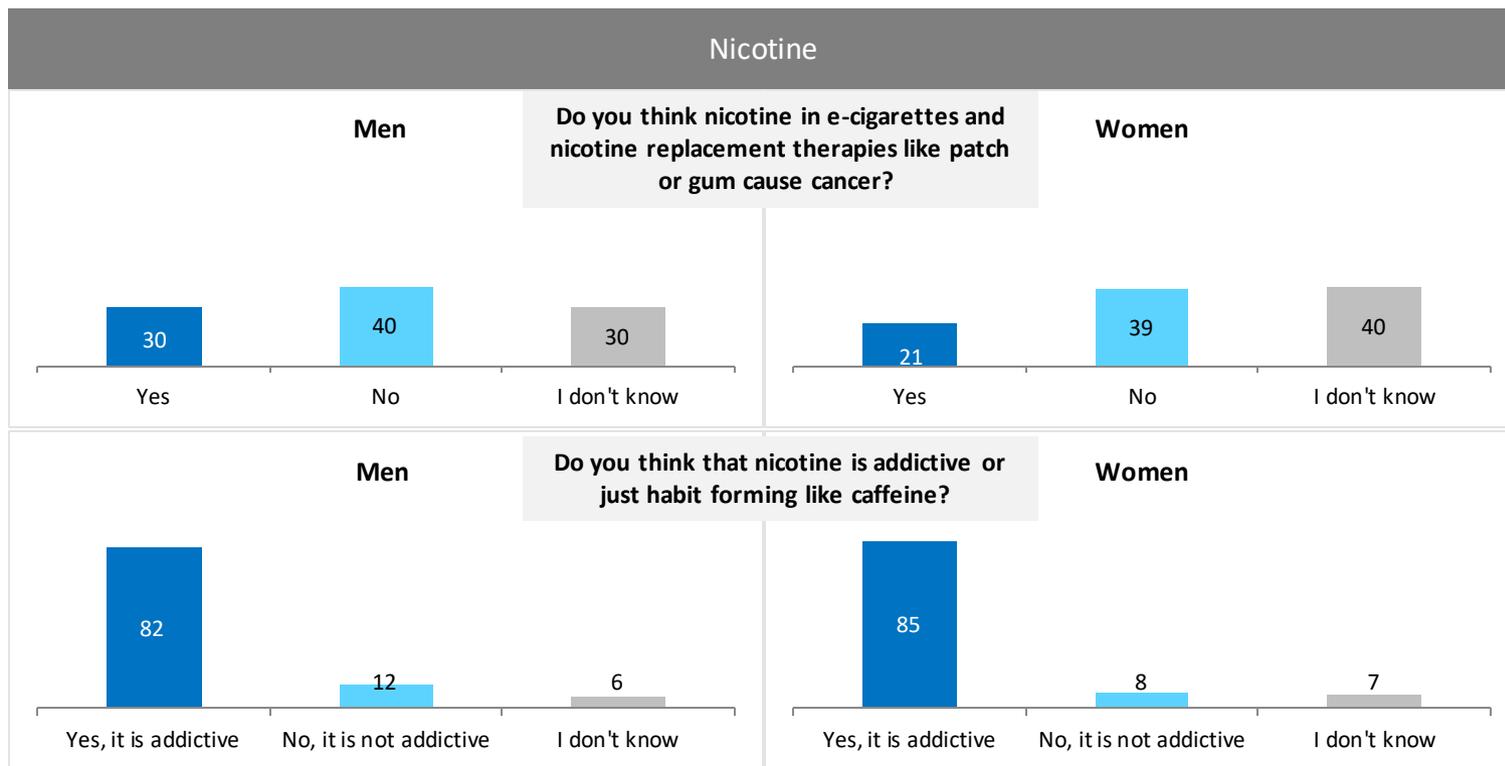


s are in %

Random Sample, Current Users of tobacco products/ other products Men : n = 892 Women : n = 990

Risk perception of Nicotine - Current users/Vapers/Smokers

Among both men and women, the majority of the people believe nicotine is addictive. Only 1 out of 4 current users of tobacco/other products opined that E-Cig/ nicotine replacement therapies like patch or gum causes cancer.

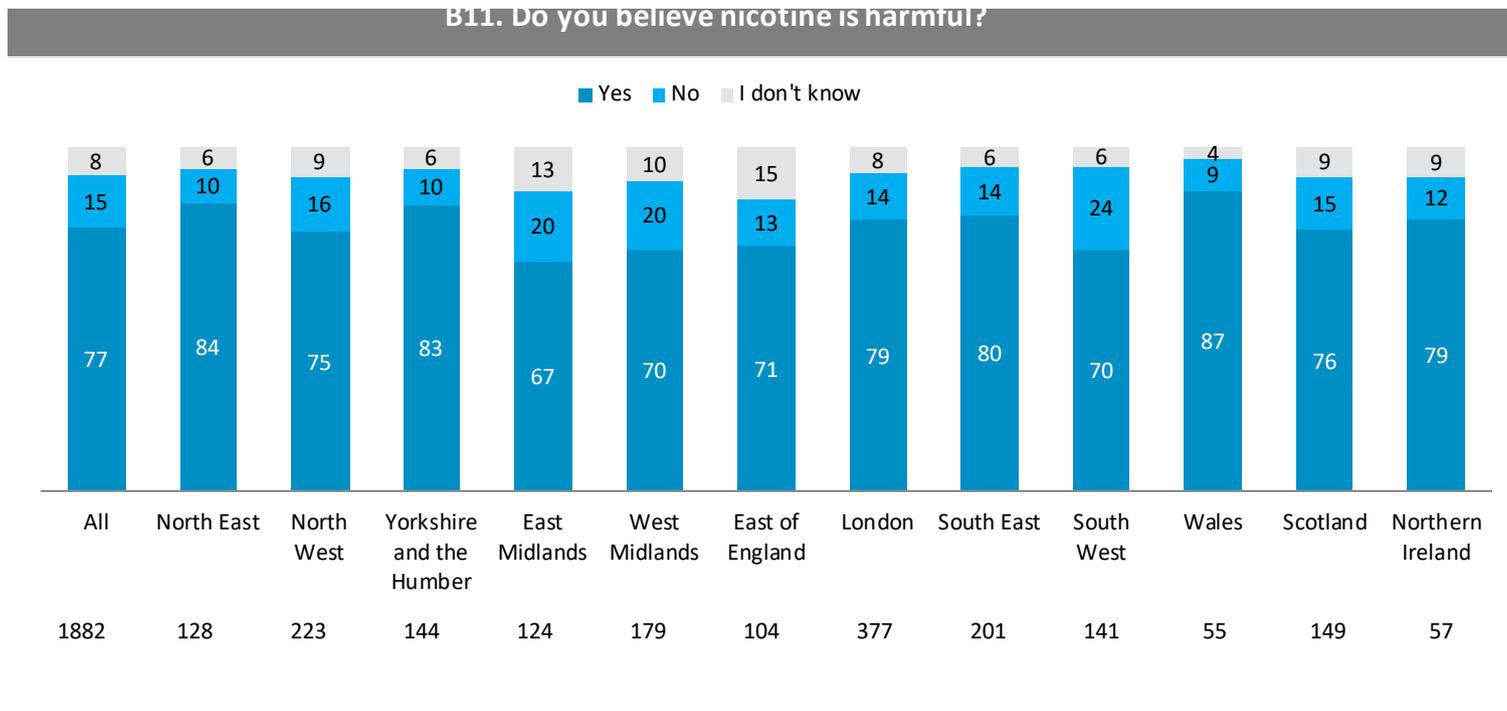


s are in %

Random Sample, Current Users of tobacco products/ other products Men : n = 892 Women : n = 990

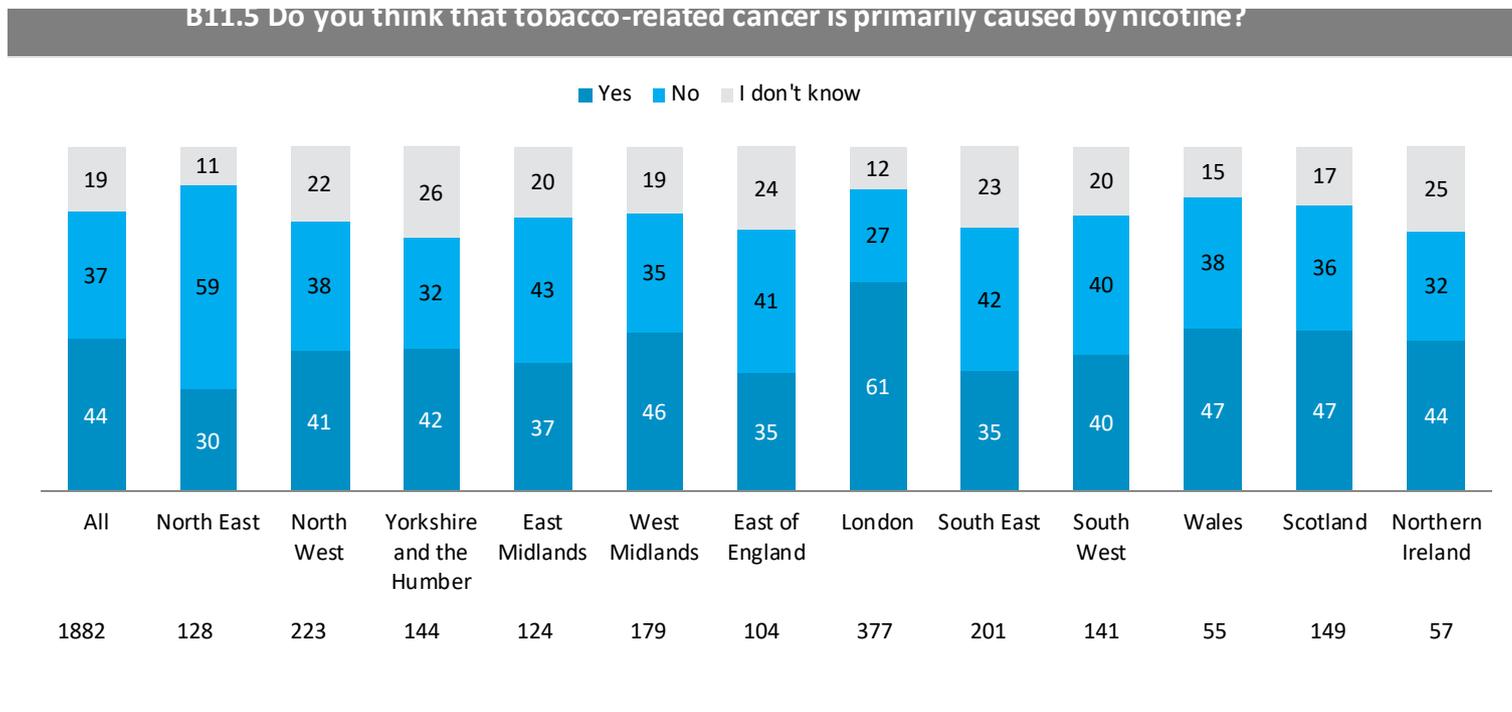
Risk perception of Nicotine - Current users/Vapers/Smokers

Nicotine is not harmful, this opinion is relatively more among the current users/vapers/smokers of South West (24%), East Midlands (20%) and West Midlands (20%).



Risk perception of Nicotine - Current users/Vapers/Smokers

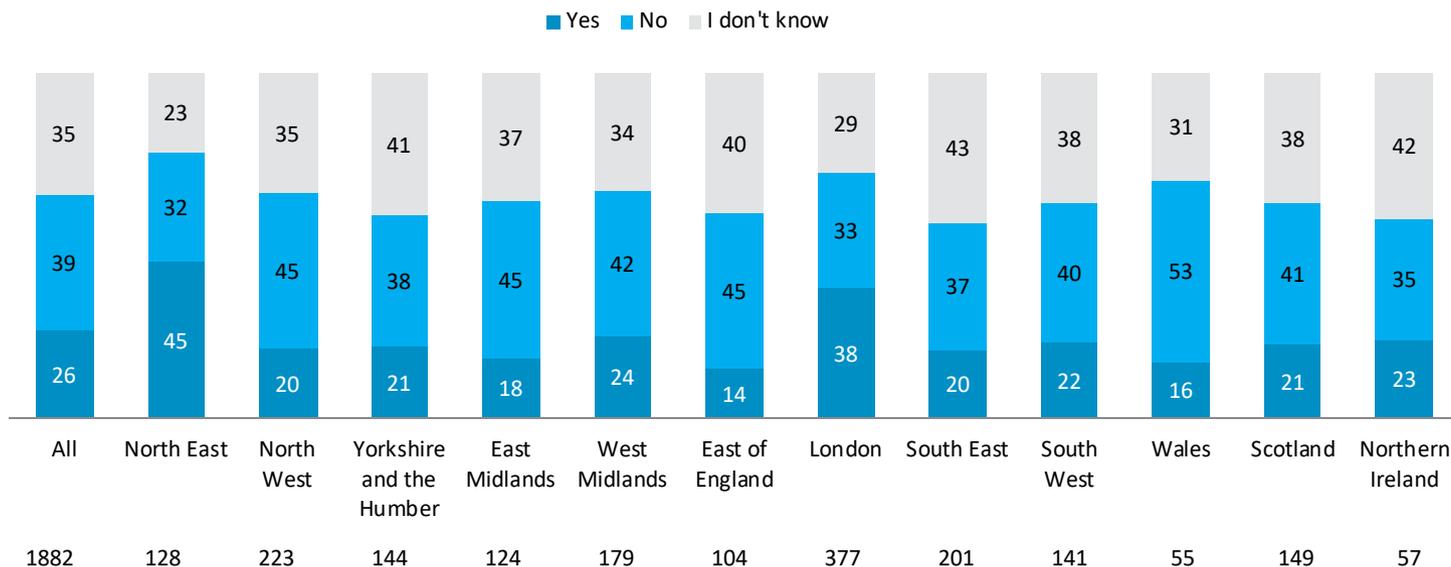
Tobacco-related cancer primarily is not caused by Nicotine, this opinion is relatively more among the current users/vapers/smokers of North East (59%), East Midlands (43%) and South West (42%).



Risk perception of Nicotine - Current users/Vapers/Smokers

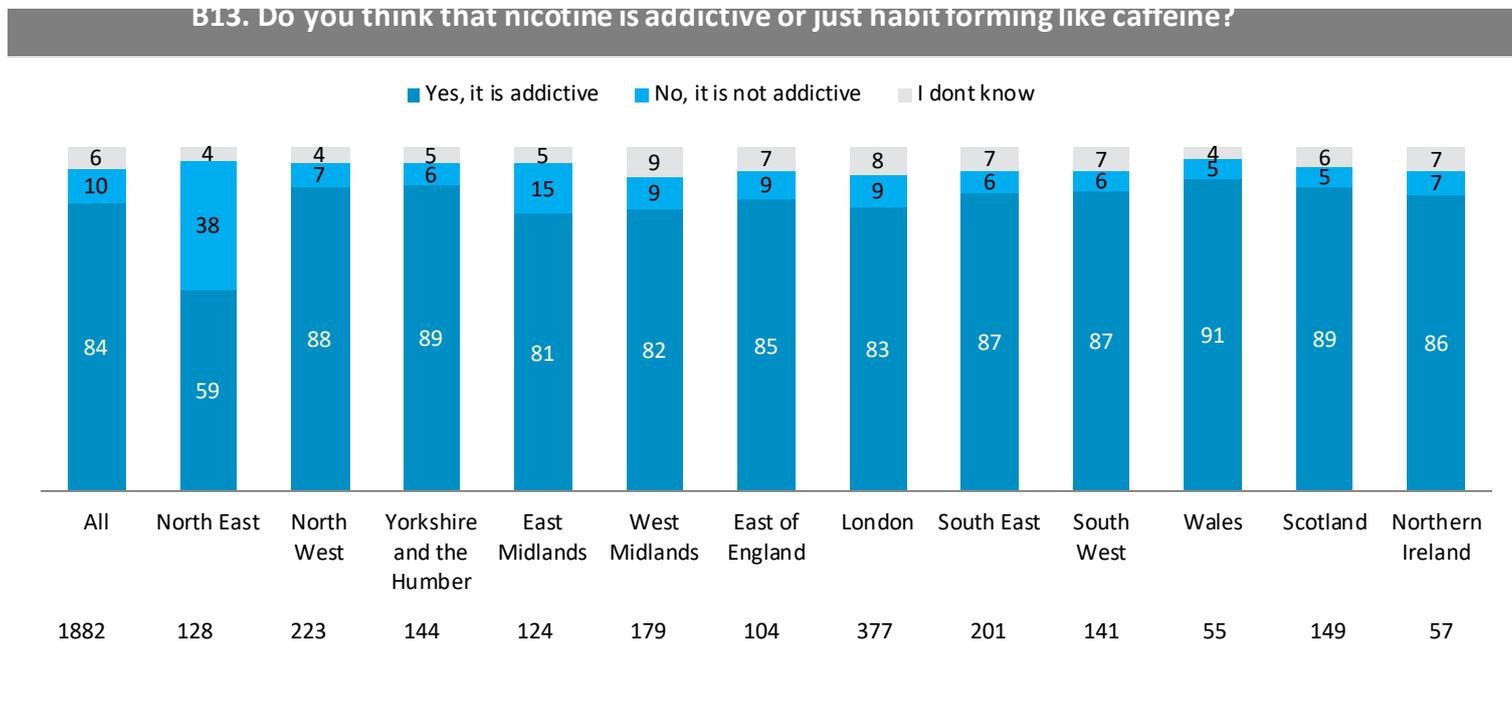
Nicotine in E-Cigarettes and Nicotine Replacement therapies causes cancer, this opinion is relatively more among the current users/vapers/smokers of North East (45%) and London (38%).

2. Do you think nicotine in e-cigarettes and nicotine replacement therapies like patch or gum cause cancer?



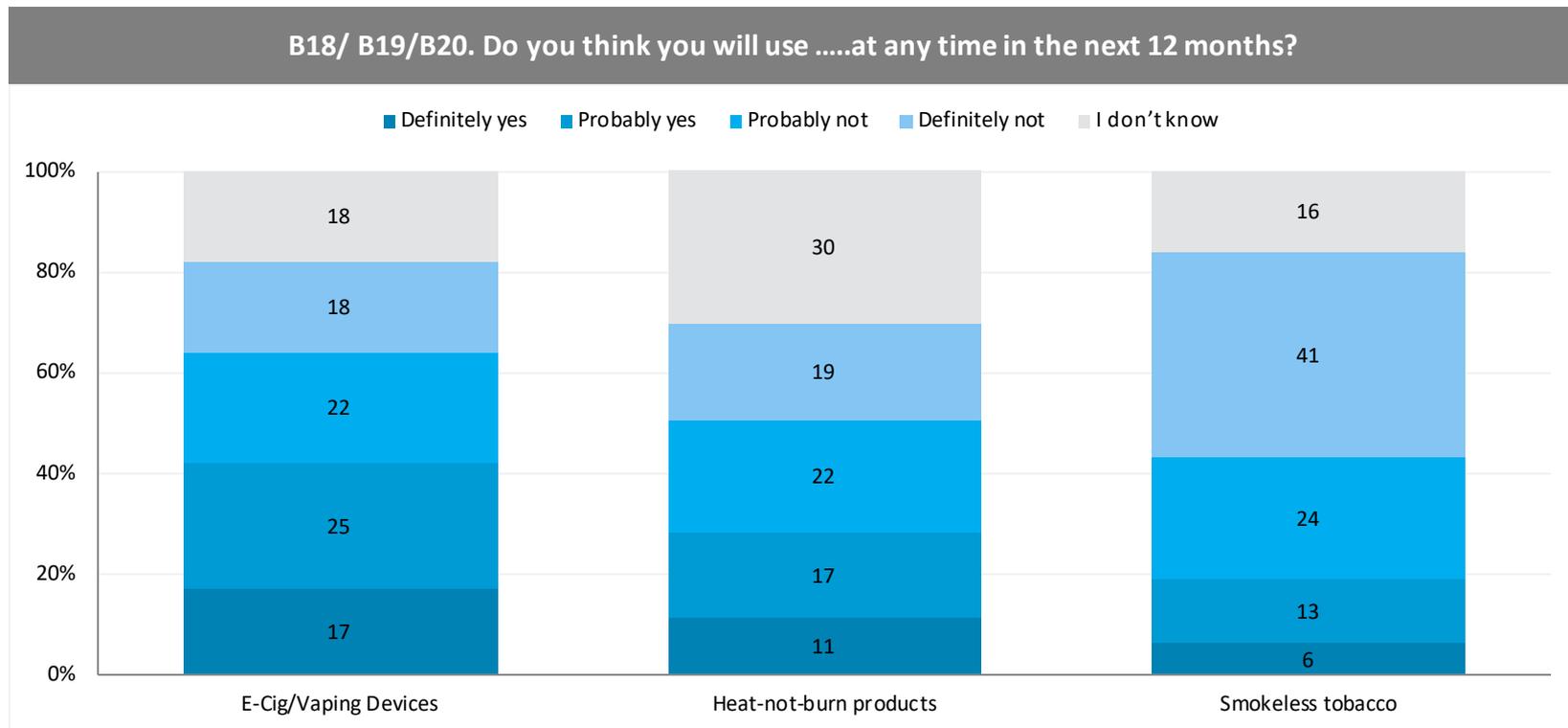
Risk perception of Nicotine - Current users/Vapers/Smokers

Apart from North East, across all regions, more than 80% Current users/vapers/smokers think that Nicotine is addictive.



Intention to purchase : E-Cig, Heat-not-burn, Smokeless tobacco

Among the current users/smokers/vapers who are not currently using Heat-not-burn products; 28% of them are willing to use Heat-not-burn products in the next 12 months.

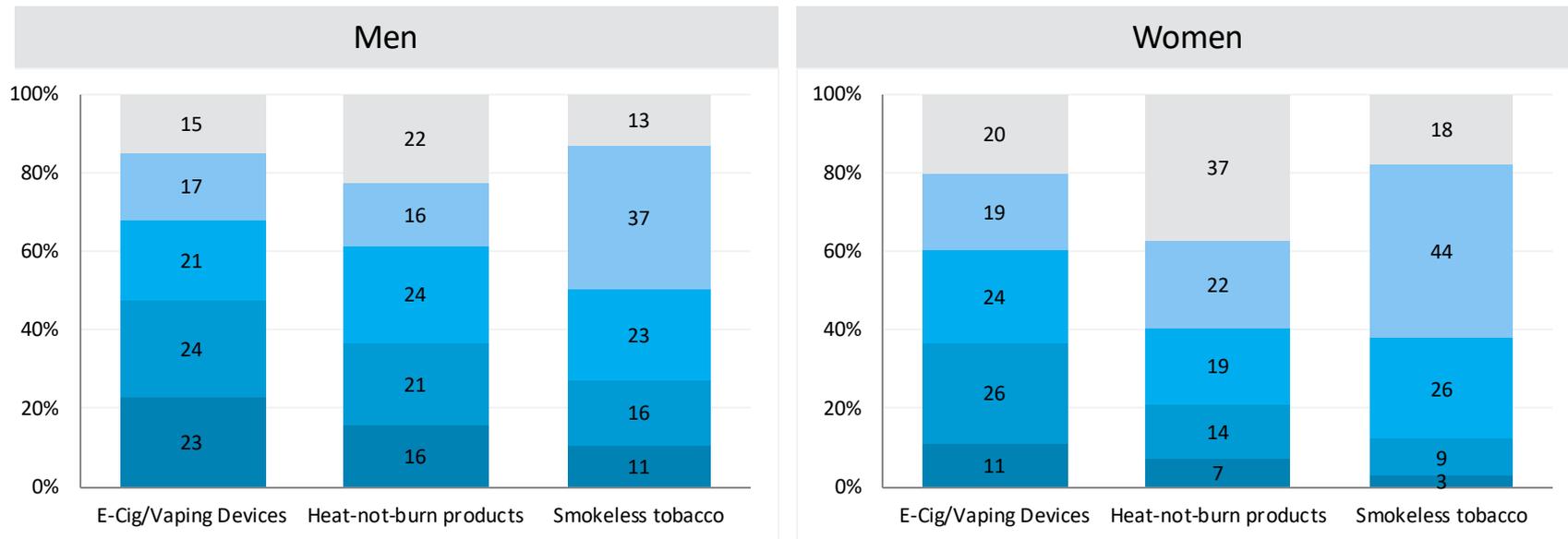


Intention to purchase : E-Cig, Heat-not-burn, Smokeless tobacco

Willingness to use Heat-not-burn products is relatively higher among Men (37%) than Women (21%)

B18/ B19/B20. Do you think you will useat any time in the next 12 months?

■ Definitely yes
 ■ Probably yes
 ■ Probably not
 ■ Definitely not
 ■ I don't know



Figures are in %

Base : Random Sample, Tobacco users/ other product users who are non users of E-Cig Men: n=478 Women: n=576, non users of Heat-not-burn products Men: n=831 Women: n=946, non users of smokeless tobacco Men: n=768 Women n=935

4.3 Quitting and Quitters

Profile Comparison

Demographic profile of quitters do not vary from the current users . However, relatively more number of Women fall under quitters.

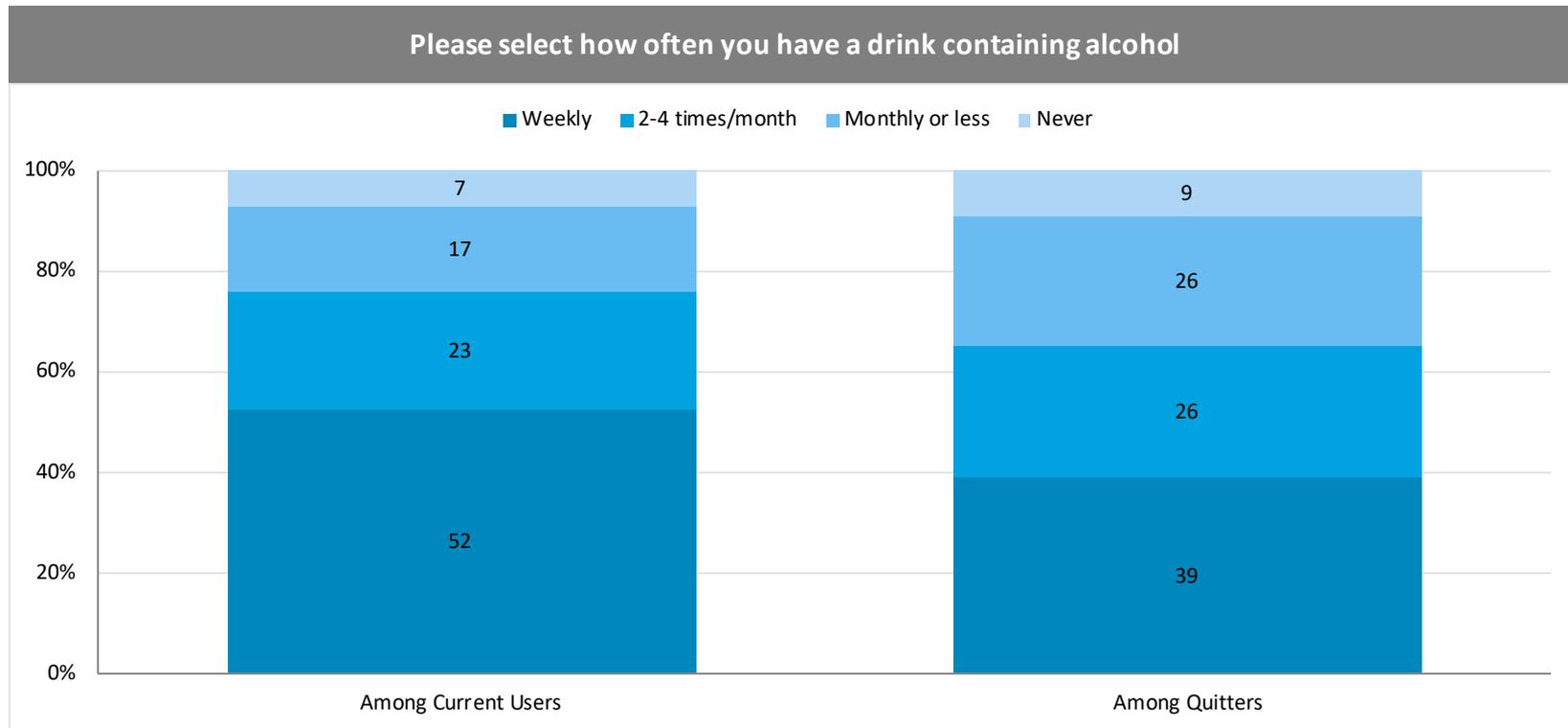
Profile of current users and quitters		
	Current Users/ Vapers/ Smokers	Quitters (who quit tobacco in last 5 years)
Base	1882	368
Men	47	40
Women	53	60
18-24 yrs	13	15
25-35yrs	31	30
36-50yrs	30	32
51- 69 yrs	26	23
Rural	11	14
Small Town	20	18
Large Town	69	66

Figures are in %

Base : Random Sample, Current Users of tobacco products : n=1882, Quitters n=368

Comparison between Among Current Users/ Vapers/ Smokers & Quitters

Alcohol consumption frequency (weekly) is relatively higher among current users/vapers/smokers.



Among Quitters: Data is for past consumption prior to quitting

Percentage in %

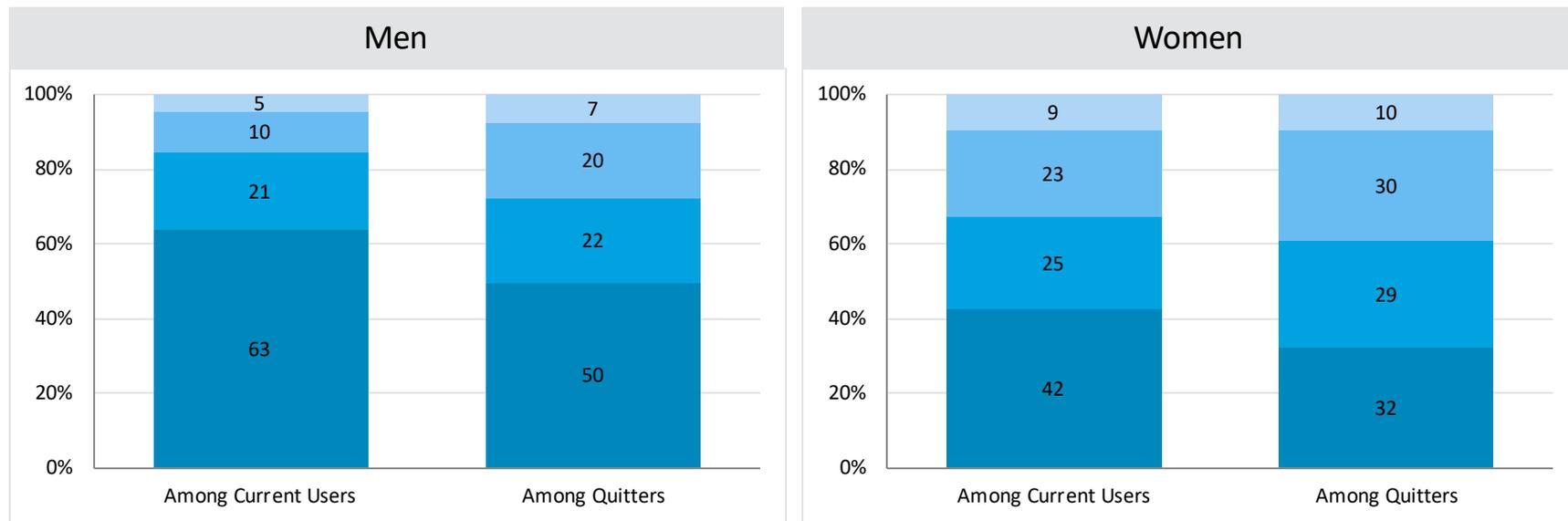
Random Sample, Current Users of tobacco products : n=1882, Quitters n=368

Comparison between Among Current Users/ Vapers/ Smokers & Quitters

Among both men and women, alcohol consumption frequency (weekly) is relatively higher among current users/vapers/smokers. However, both among current users and quitters; alcohol consumption frequency is higher among Men.

Please select how often you have a drink containing alcohol

■ Weekly ■ 2-4 times/month ■ Monthly or less ■ Never



Note: Among Quitters: Data is for past consumption prior to quitting

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n = 892 Women : n = 990, Quitters Men : n = 147 Women : n = 220

Usage Comparison

Among quitters, usage of Cigarettes, Nicotine Gum and Nicotine Patch were relatively more than among current users/ vapers/ smokers.

Of the following products, which products are you currently consuming/were consuming?		
	Current Users/ Vapers/ Smokers	Quitters (who quit tobacco in last 5 years)
Base	1882	368
Cigarettes	71	78
Rolled Cigarettes	39	43
Electronic cigarettes/vaping devices with nicotine	38	30
Capsule/Flavored cigarettes	20	23
Tubed Cigarettes	14	12
Electronic cigarettes/vaping devices without nicotine	14	16
Nicotine gum	9	15
Nicotine patch	5	14

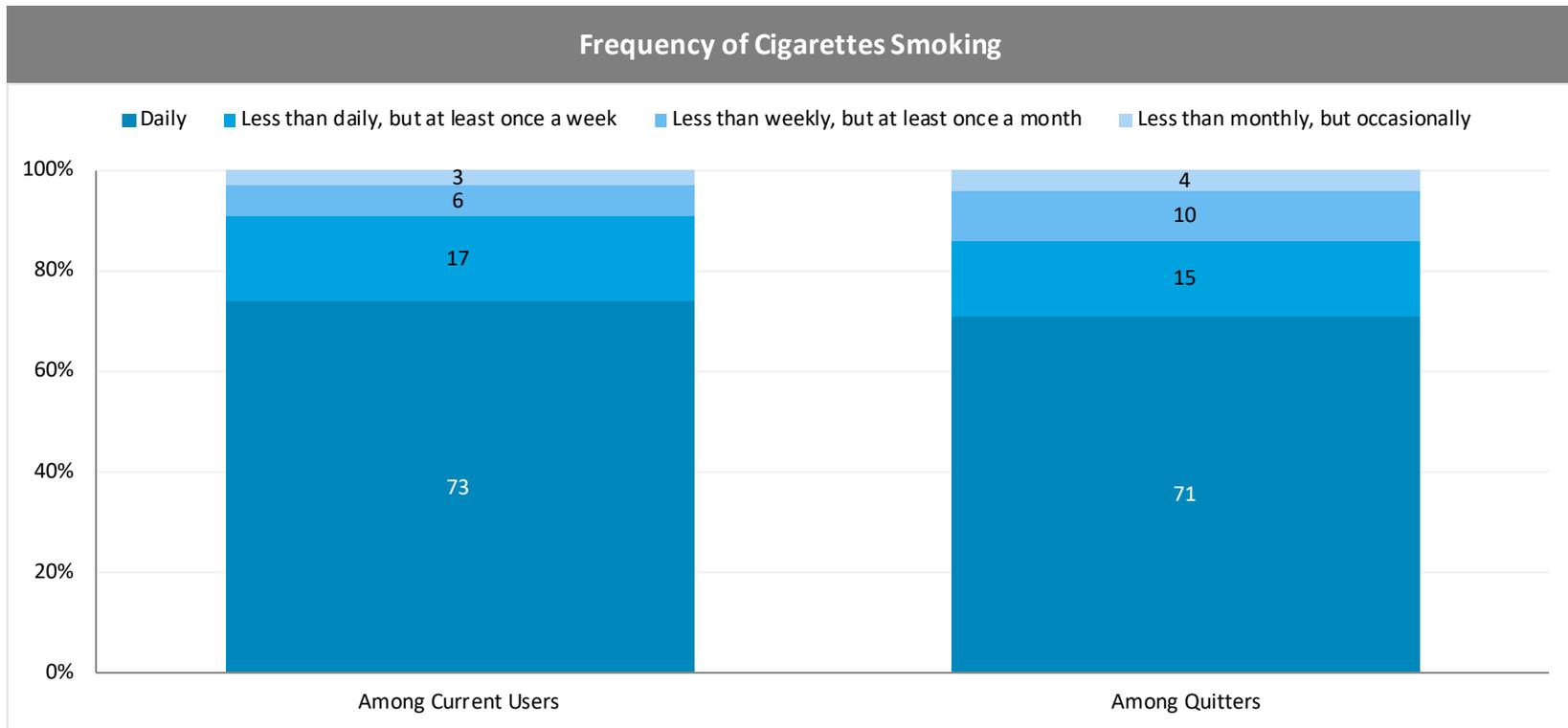
Note: Among Quitters: Data is for past consumption prior to quitting

Figures are in %

Base : Random Sample, Current Users of tobacco products : n=1882, Quitters n=368

Frequency of Smoking Comparison

A similar level of daily usage of Cigarettes noticed between Current smokers and Quitters.



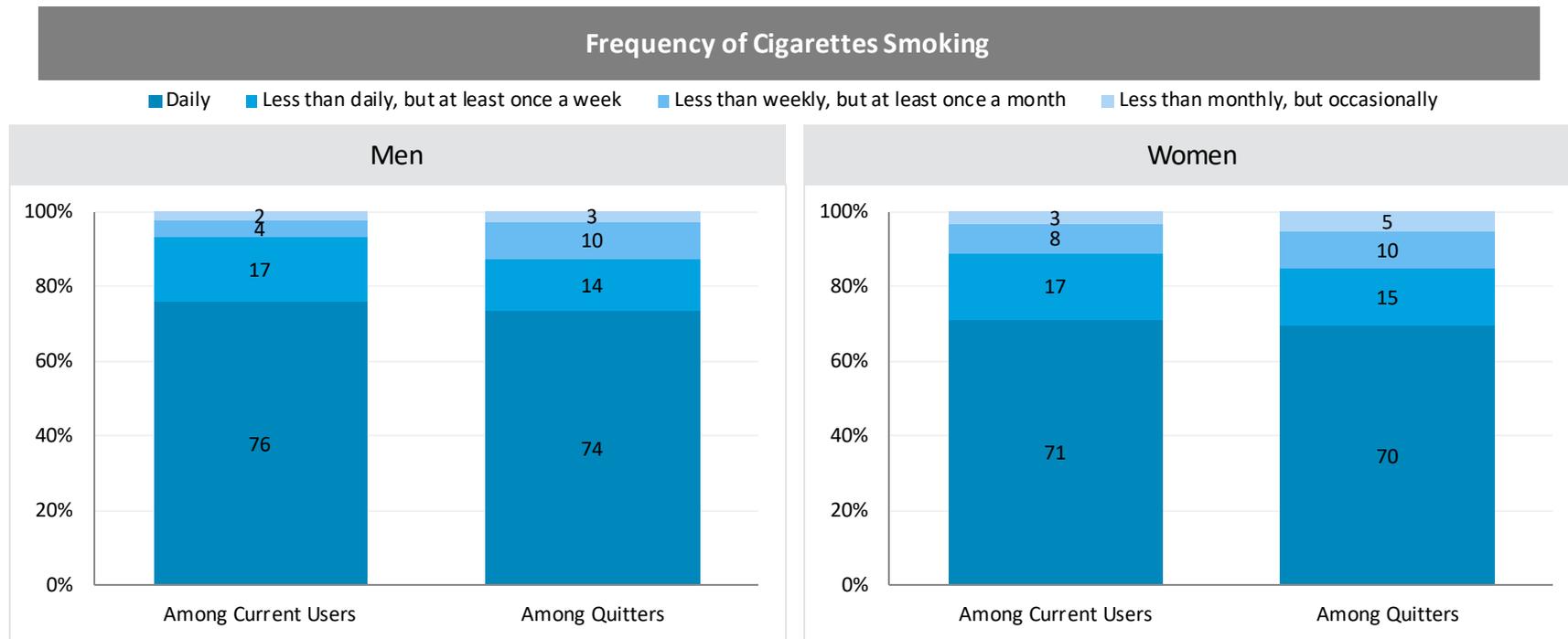
Among Quitters: Data is for past consumption prior to quitting

Percentage in %

Random Sample, Current Users of Factory made Cigarettes : n= 1336, Quitters n=288

Frequency of Smoking Comparison

Among both men and women, a similar level of daily usage of Cigarettes noticed between Current Smokers and Quitters.



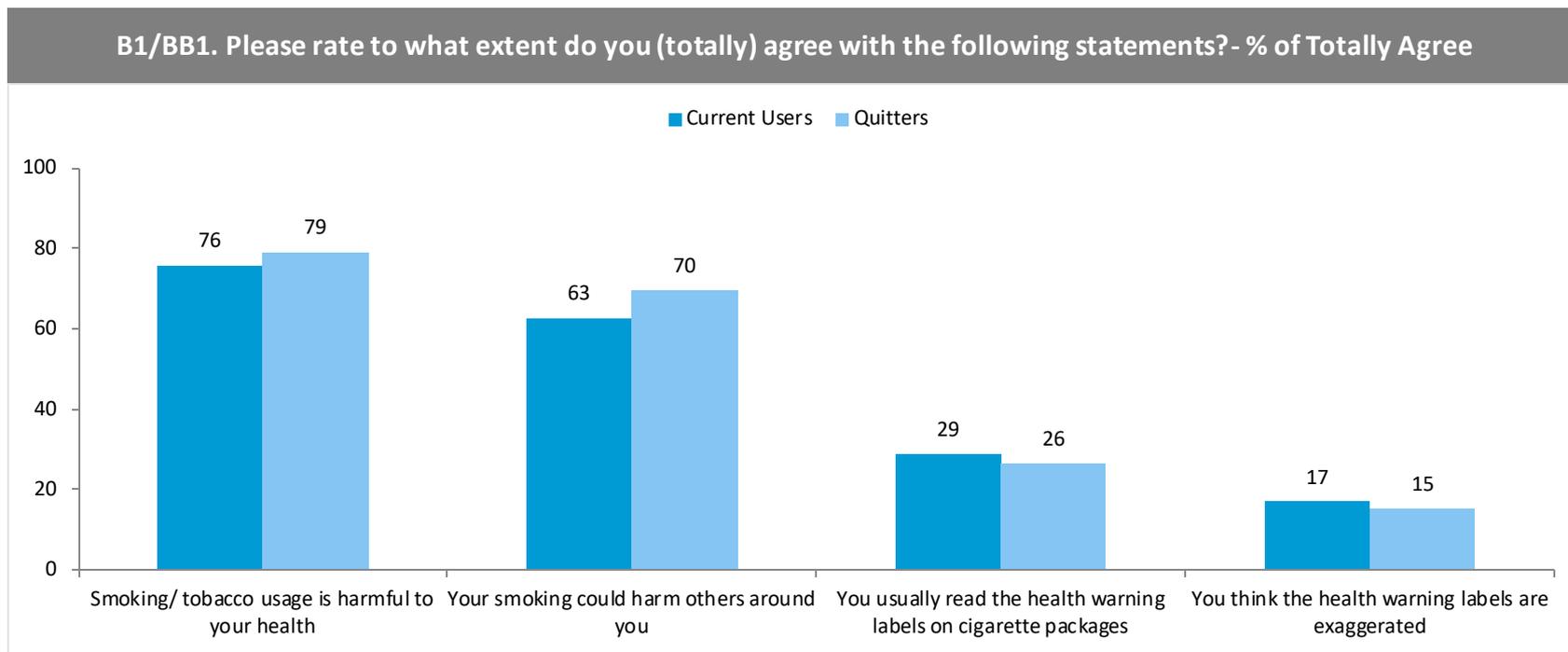
Note: Among Quitters: Data is for past consumption prior to quitting

Figures are in %

Base : Random Sample, Current Users of Factory made Cigarettes Men : n = 644 Women : n = 692, Quitters Men : n = 117 Women : n = 171

Risk perception comparison – Current Users/Vapers/Smokers vs. Quitters

A similar level of risk perception noticed among both current users/vapers/smokers and quitters.



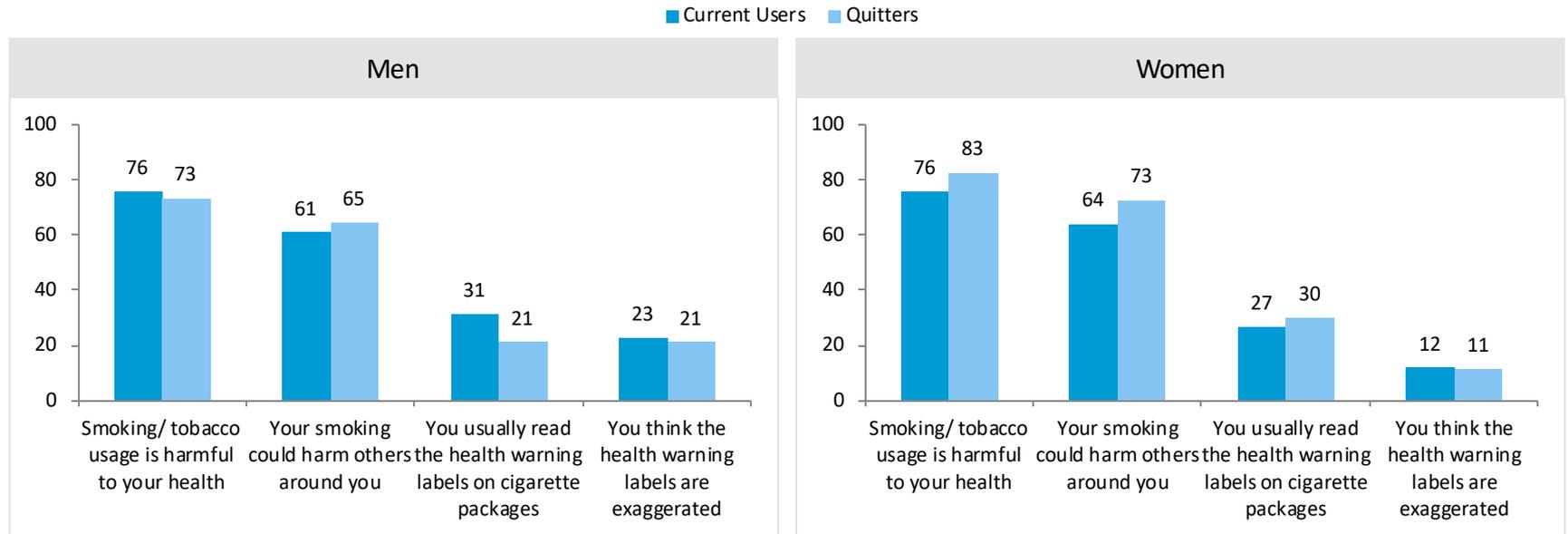
Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products : n=1882 Quitters : n=368

Risk perception comparison – Current Users/Vapers/Smokers vs. Quitters

Among women, quitters agreed more than the current users that smoking/ tobacco usage is harmful to them as well as harmful for others around them.

B1/BB1. Please rate to what extent do you (totally) agree with the following statements?- % of Totally Agree

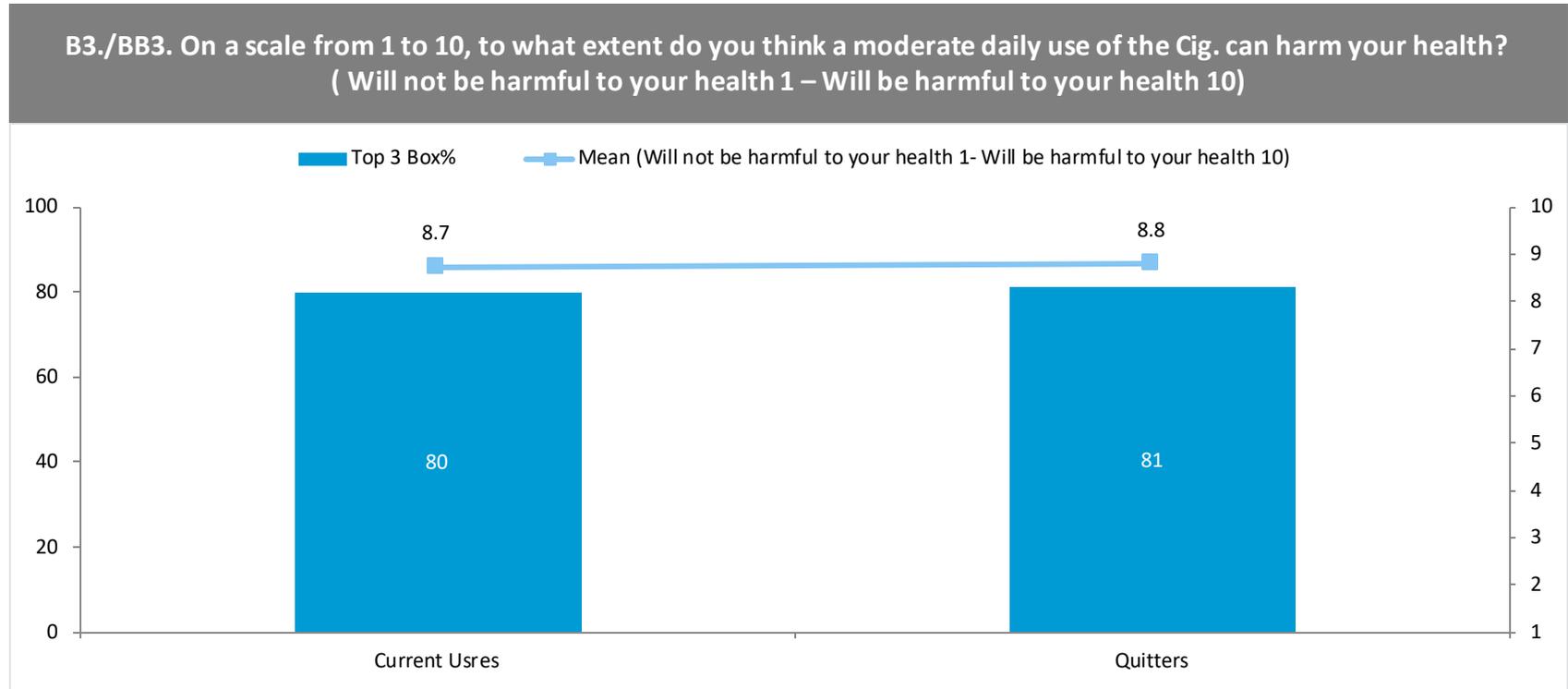


Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products Men : n=892 Women : n=990, Quitters Men : n=147 Women : n=220

Risk perception comparison – Current Users/Vapers/Smokers vs. Quitters

to difference observed in risk perception between current smokers/users/vapers and quitters.



6: Those who coded 8, 9 or 10 on a 10 points scale (Will not be harmful to your health 1 - Will be harmful to your health 10)

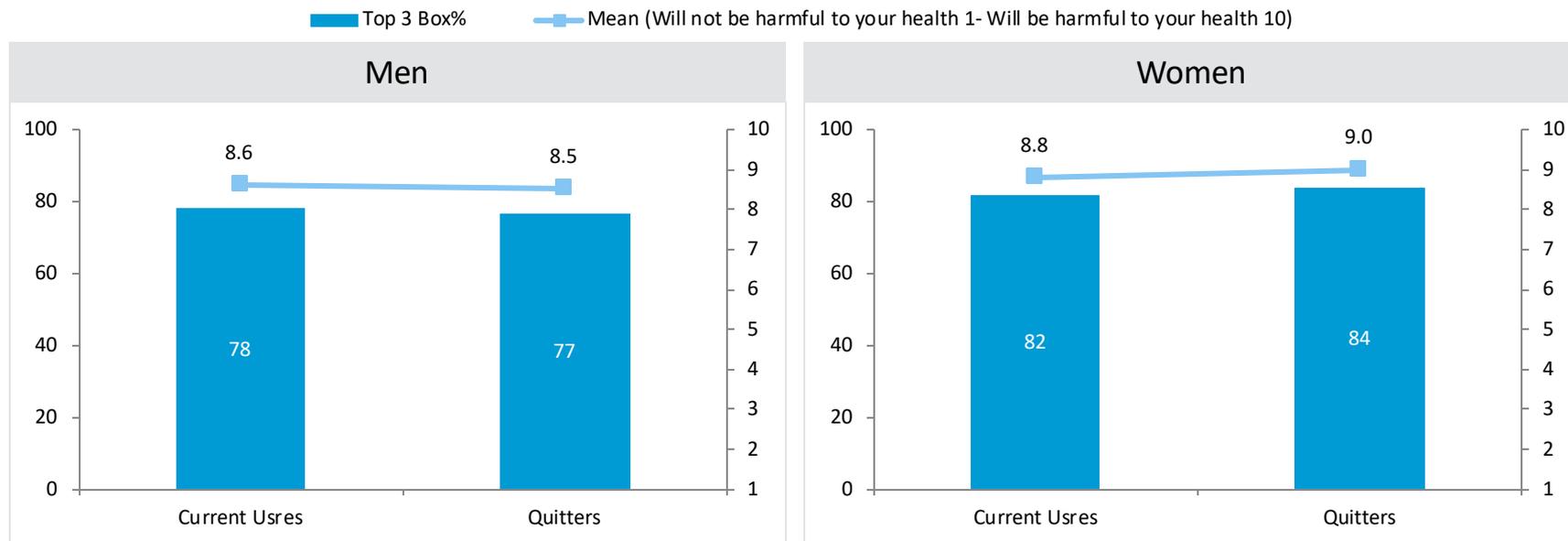
Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products : n=1882 Quitters : n=368

Risk perception comparison – Current Users/Vapers/Smokers vs. Quitters

Among both men and women, no major difference observed in risk perception between current users/smokers/vapers and quitters.

**B3./BB3. On a scale from 1 to 10, to what extent do you think a moderate daily use of the Cig. can harm your health?
(Will not be harmful to your health 1 – Will be harmful to your health 10)**



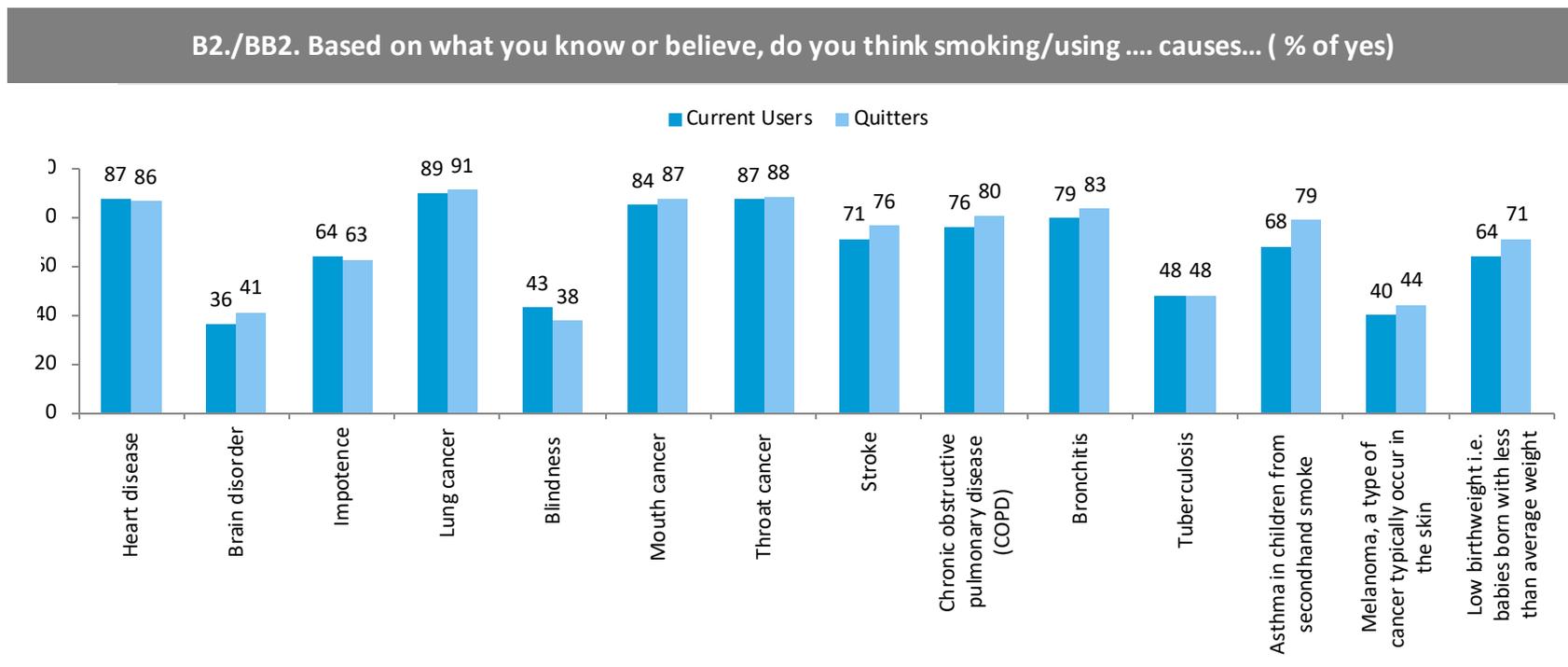
Top 3 Box: Those who coded 8, 9 or 10 (will be harmful to your health)

Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products Men : n=892 Women : n=990, Quitters Men : n = 147 Women : n=220

Risk perception comparison – Current Users/Vapers/Smokers vs. Quitters

A similar level of risk perception noticed between current users and quitters.

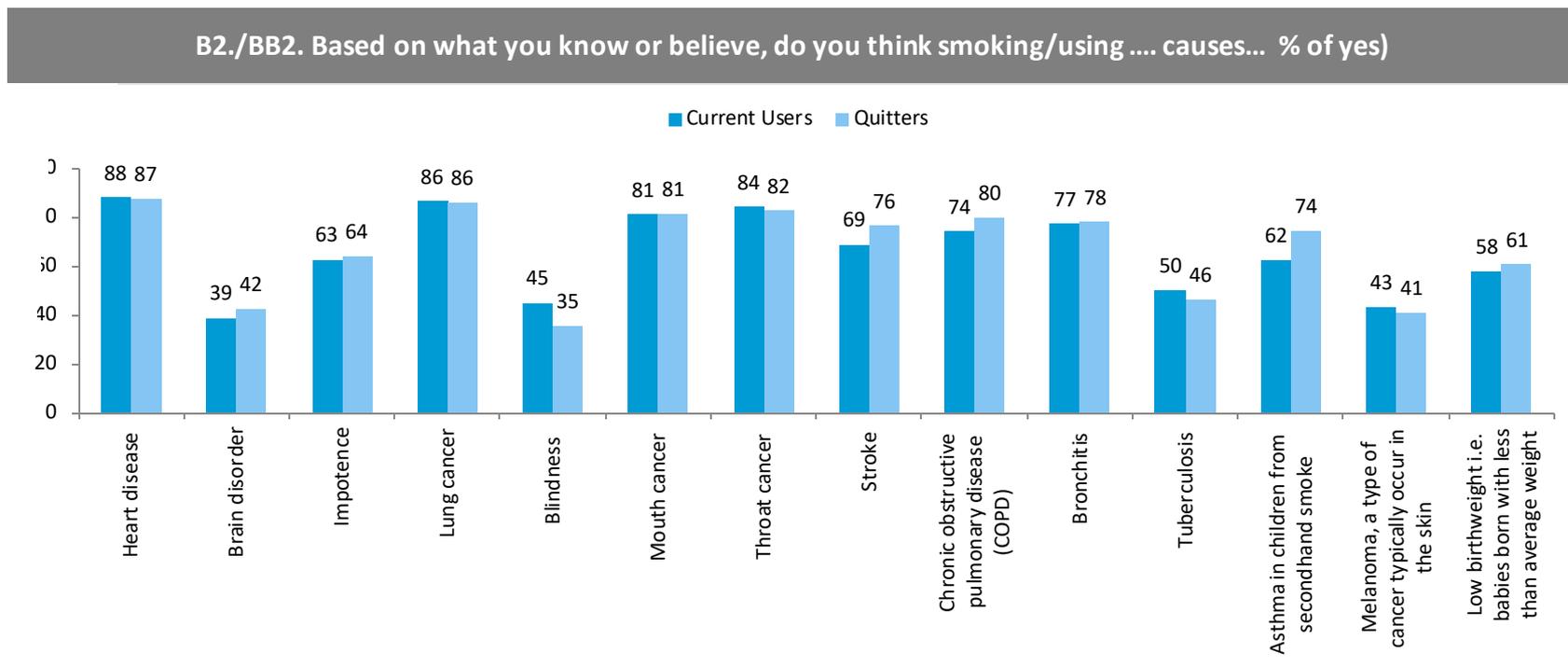


Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products : n=1882 Quitters : n=368

Risk perception comparison – Current Users/Vapers/Smokers vs. Quitters

A similar level of risk perception noticed between current users and quitters.

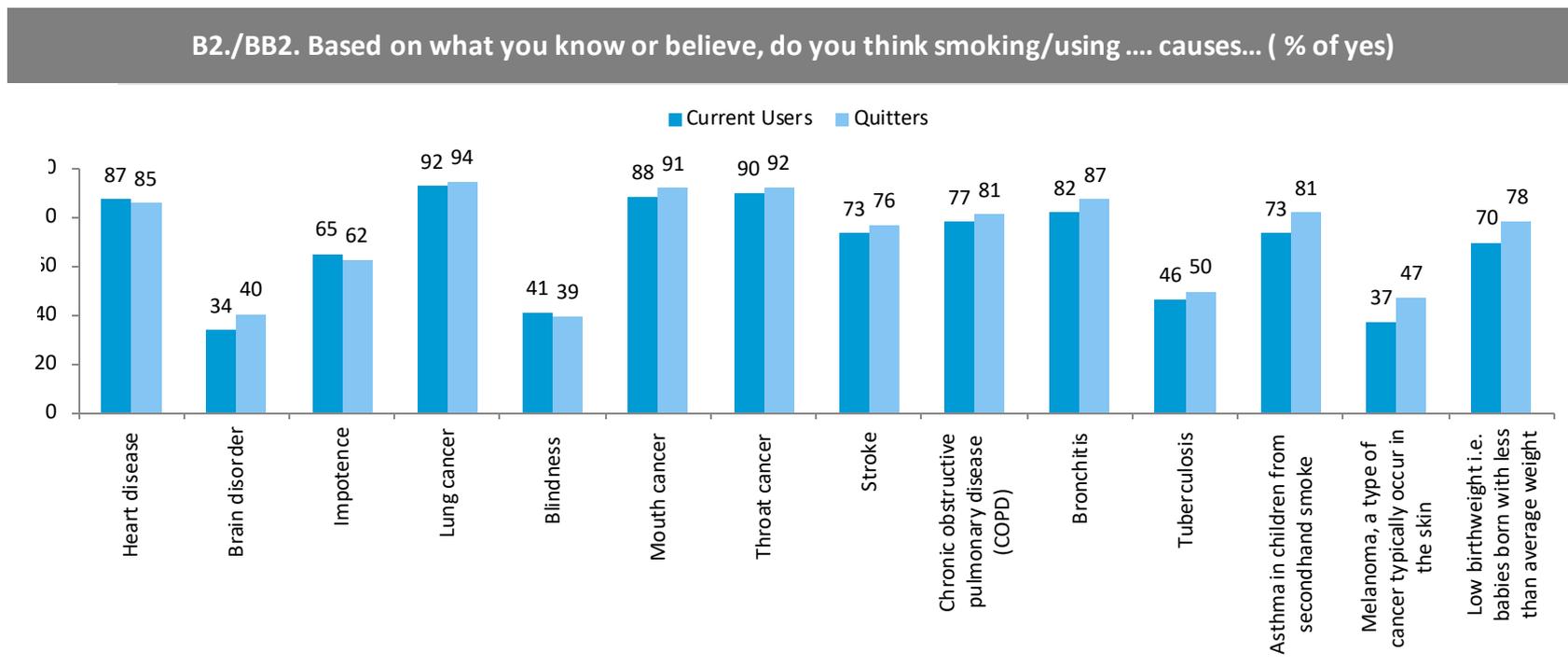


Figures are in %

Base : Random Sample, Current Users of tobacco products/other products Men : n = 892, Quitters Men : n = 147

Risk perception comparison – Current Users/Vapers/Smokers vs. Quitters

The risk perception of low birth-weight was noticed to be higher among women, especially among quitters.



Figures are in %

Base : Random Sample, Current Users of tobacco products/other products Women : n=990, Quitters Women : n=220

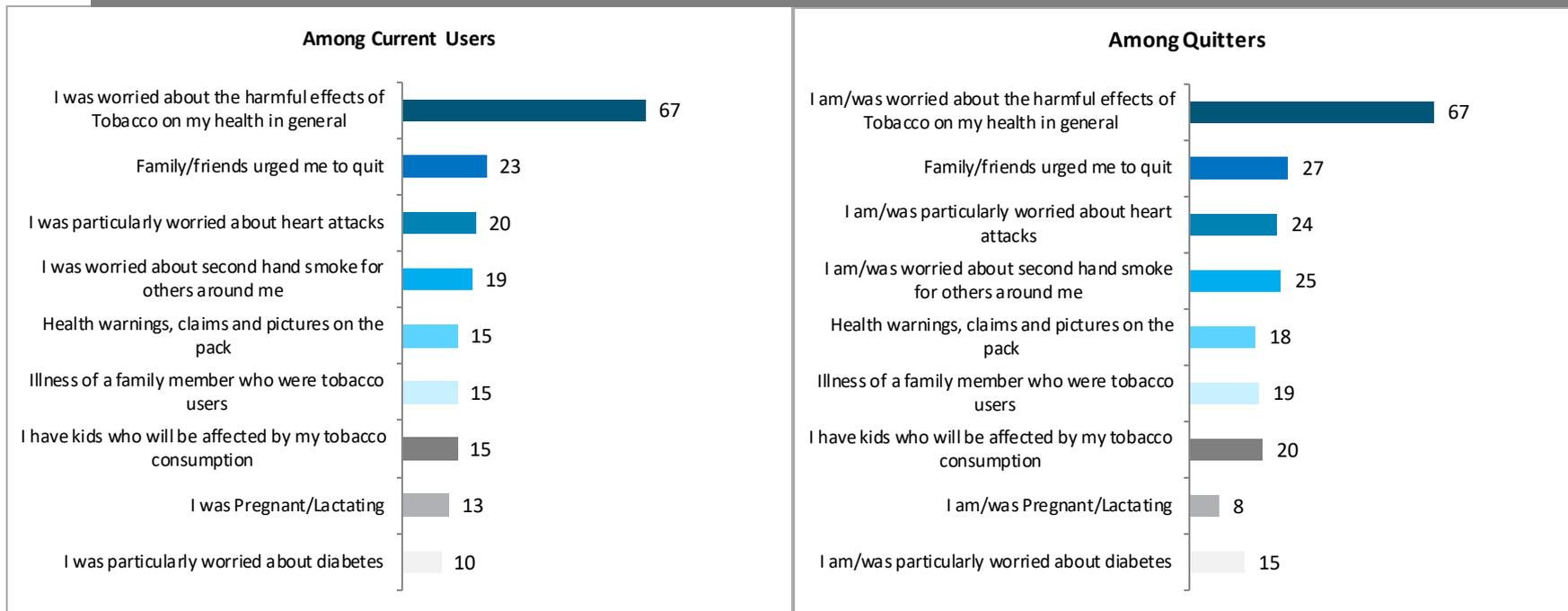
Quit – Past attempt and current plan among Current users/Vapers/Smokers

The majority claimed that they have attempted to quit tobacco/other products. Every second current users/vapers/smokers claimed that they are planning to quit. Planning to quit is relatively noticed more among 18-24yrs consumers (55%).

B14. Have the current users attempted to quit or not? B16. Are they planning to quit or not?

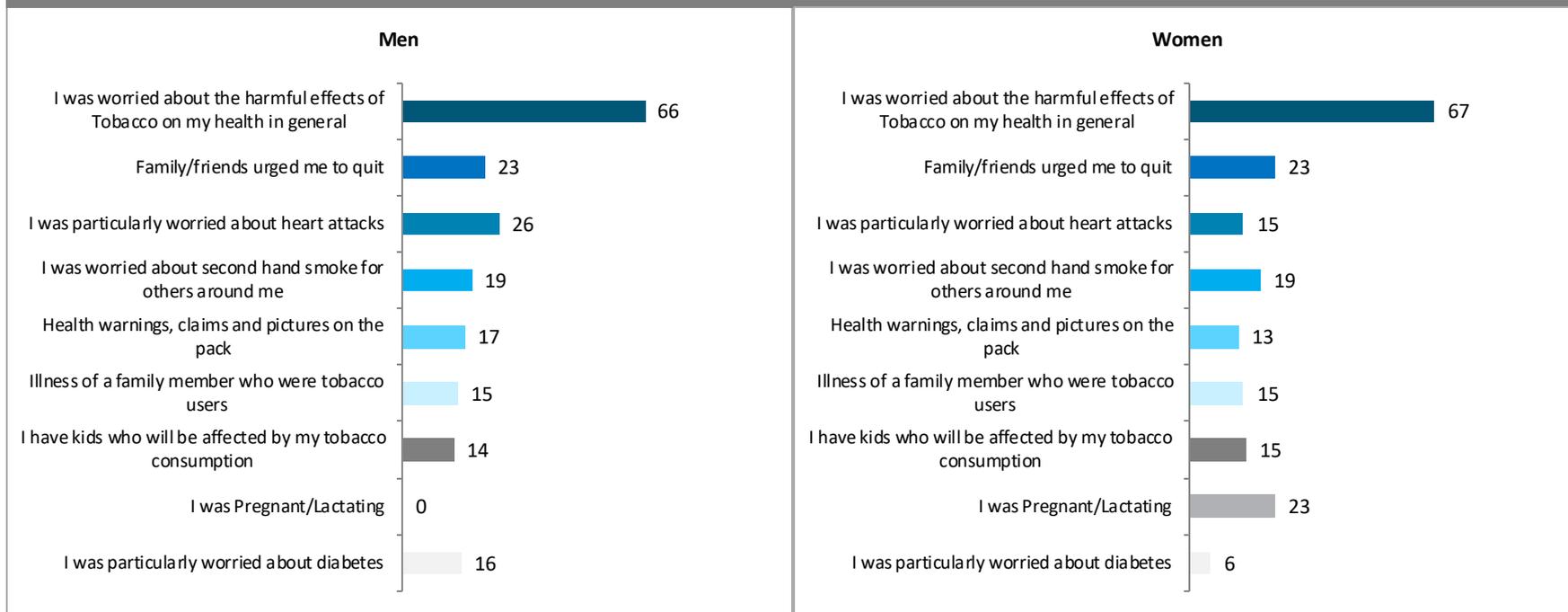
	All Current Users	Men	Women	18-24yrs	25-35yrs	36-50 yrs	51-70 yrs	Rural area or village	Small or middle sized town	Large town
		%	%	%	%	%	%	%	%	%
n	1882	892	990	254	581	556	491	202	384	1290
B14. In the past, have you ever made a serious attempt to quit smoking/ quit using tobacco products? That is, have you stopped smoking for at least one day or longer because you were trying to quit?										
Yes	73	70	76	72	66	76	77	77	78	71
No	27	30	24	28	34	24	23	23	22	29
B16. Are you planning to quit smoking/ using tobacco products?										
Yes	47	46	48	55	50	47	38	48	49	46
No	27	30	24	22	29	25	29	27	23	28
I don't know	26	24	28	22	20	28	33	25	27	26
I prefer not to answer	1	1	0	0	1	1	0	0	1	0

14.5/ BB 14.5 What were the reasons behind your decision to attempt to quit smoking quitting Tobacco consumption?



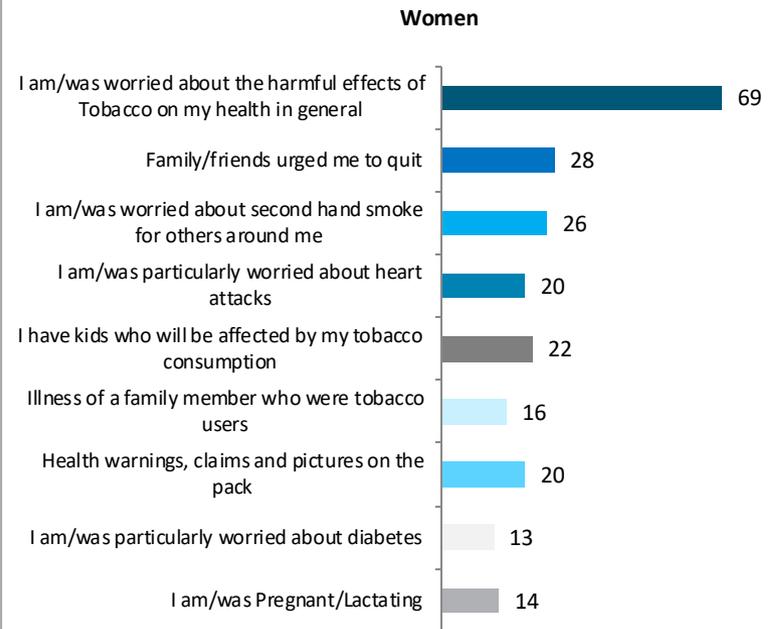
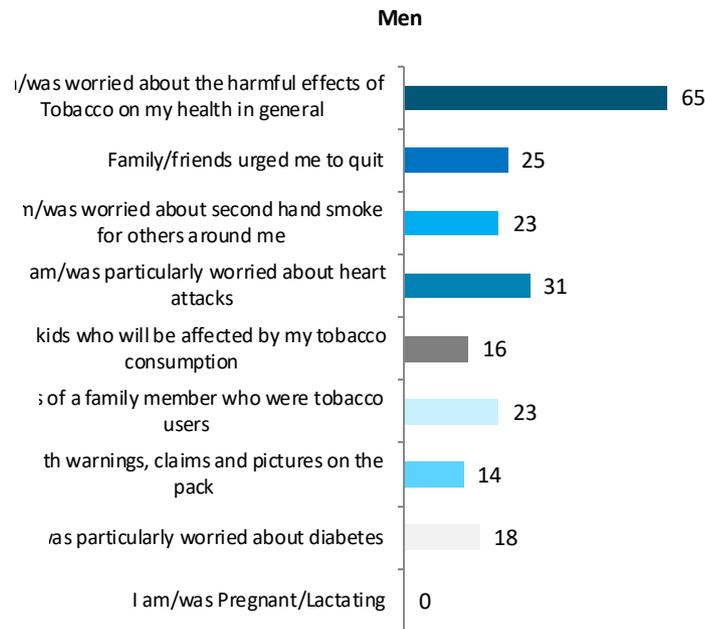
Among both men and women, worry about the harmful effects of tobacco on health and family/friend's suggestions are the main reasons for attempting to quit.

B14.5. What were the reasons behind your decision to attempt to quit smoking/ quitting Tobacco consumption?



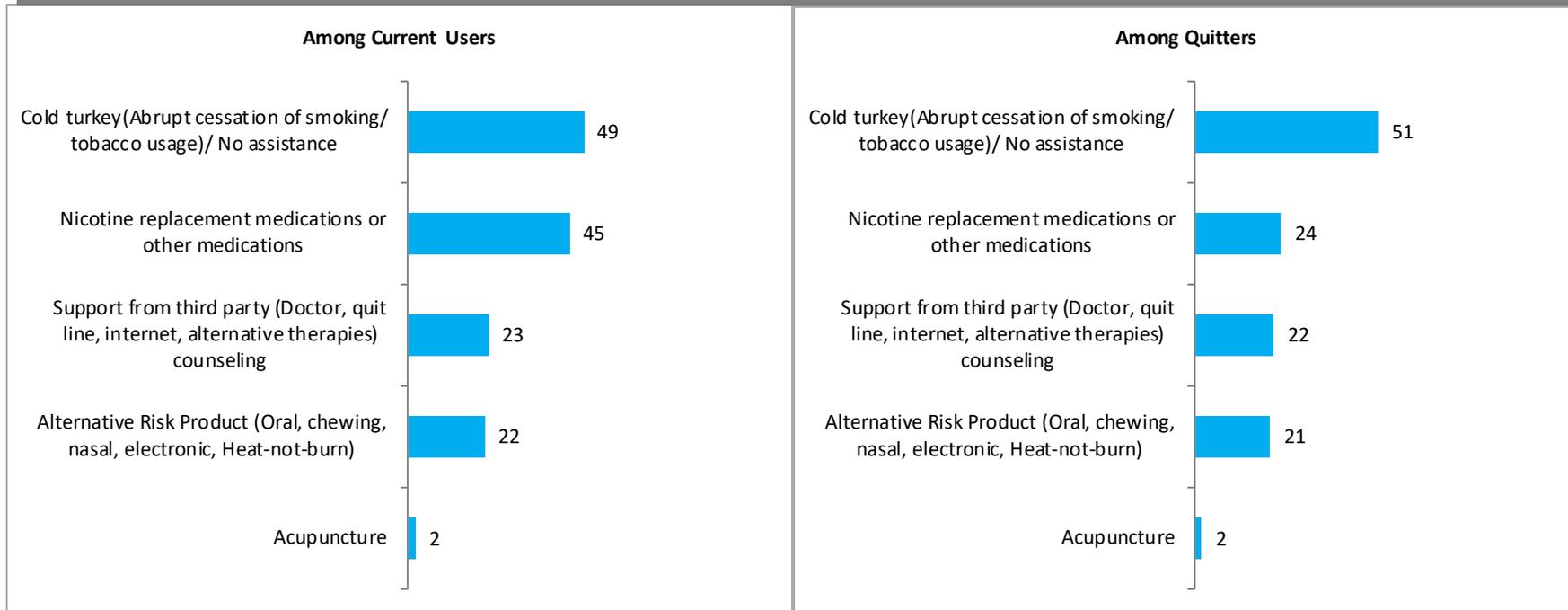
Among both men and women, worry about the harmful effects of tobacco on health and family/friend's suggestions are the main reasons for quitting.

BB 14.5 What were the reasons behind your decision to quit tobacco/nicotine consumption?



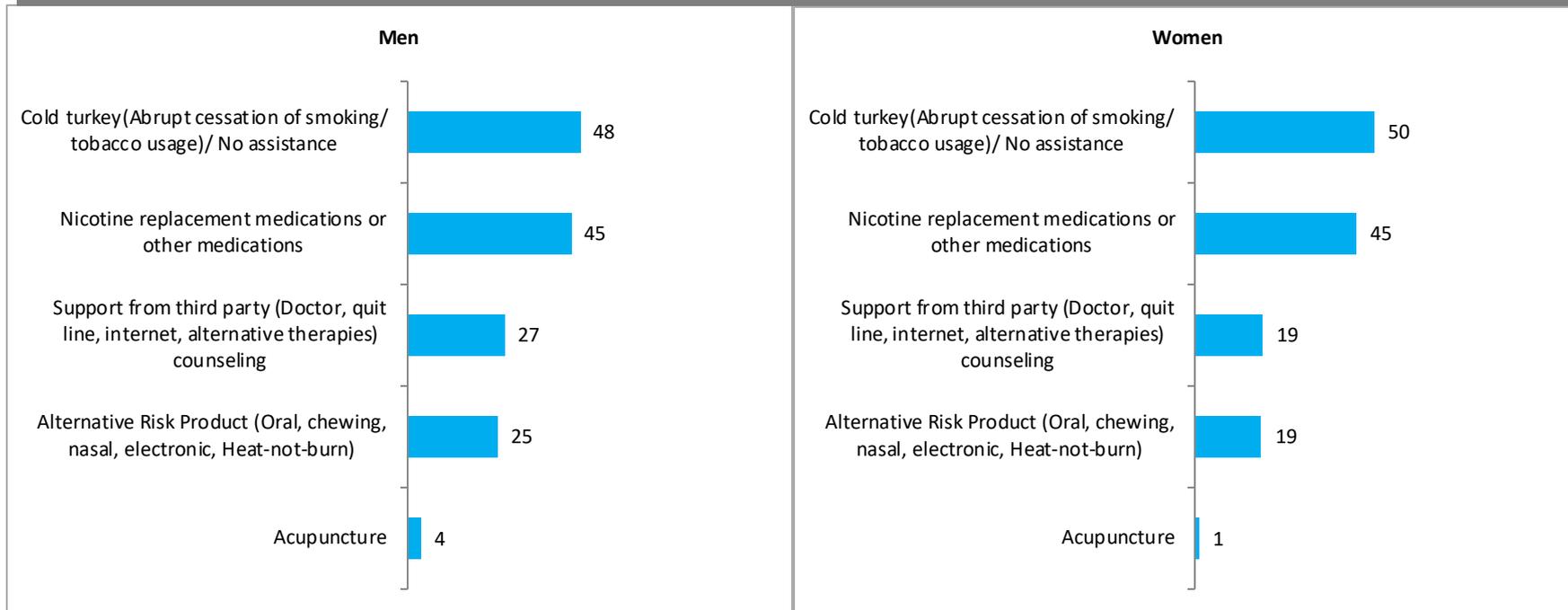
Cold Turkey followed by Nicotine replacement therapy are the major means of quitting.

B.15/ BB.15 How did you try to quit smoking/ using of tobacco products?



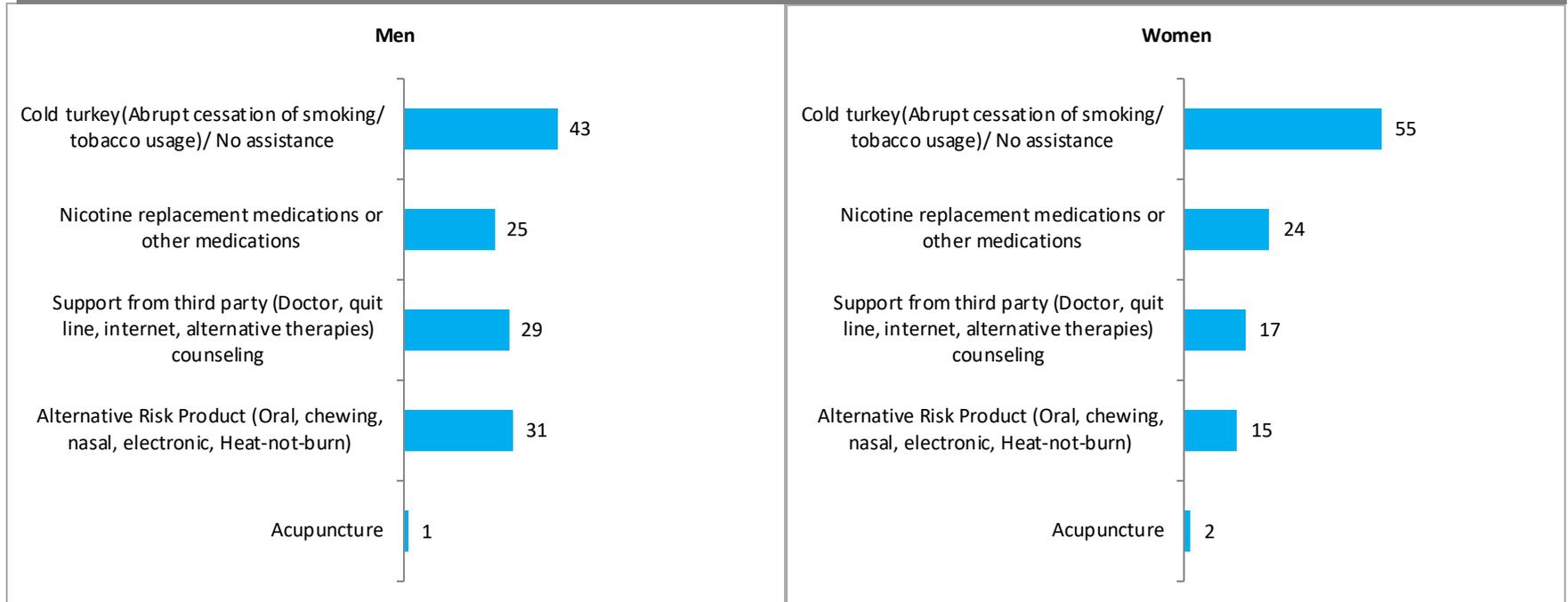
Among both men and women, Cold Turkey followed by Nicotine replacement therapy are the major means of attempting to quit.

B.15 How did you try to quit smoking/ using of tobacco products?



Cold Turkey followed by Nicotine replacement therapy are the major means of quitting. Cold Turkey is a comparatively larger means of quitting among women.

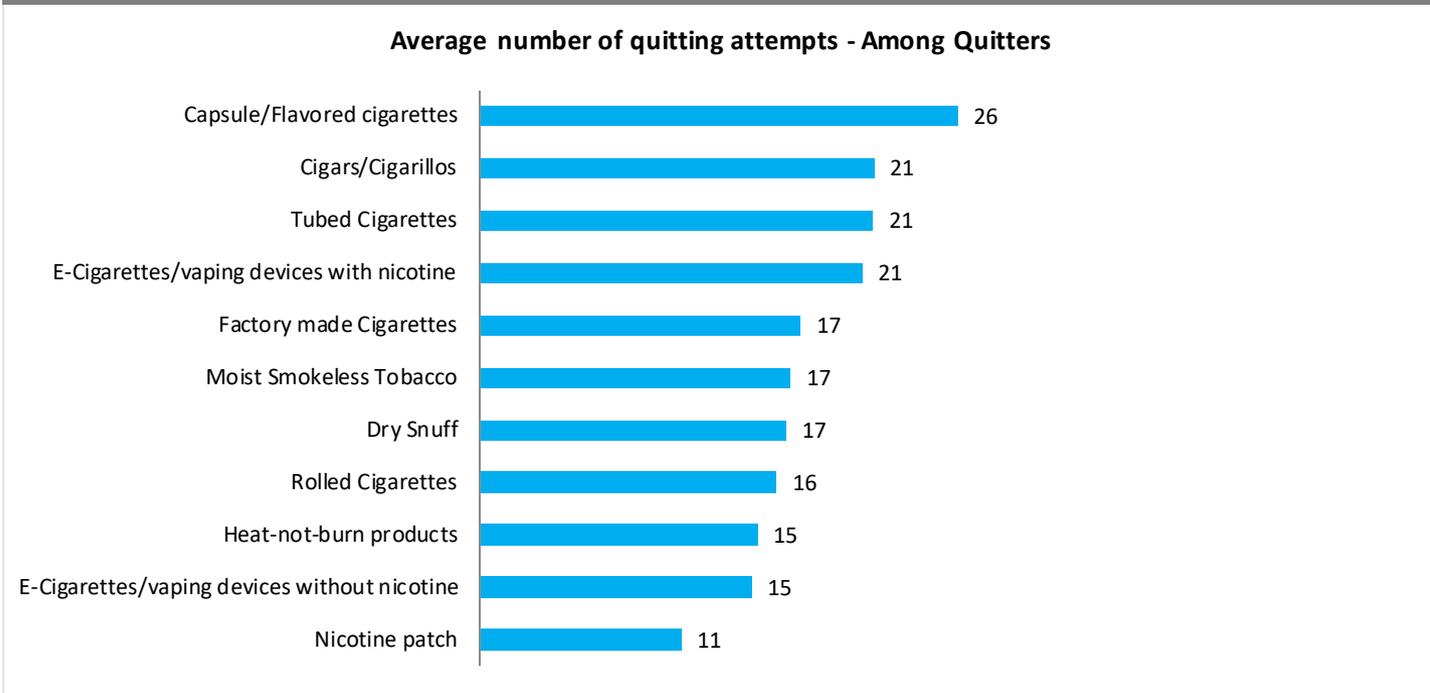
BB.15 How did you quit smoking/ using of tobacco/nicotine products?



Quitting Attempts by products : Among Quitters

Across products, multiple numbers of quitting attempts was noticed.

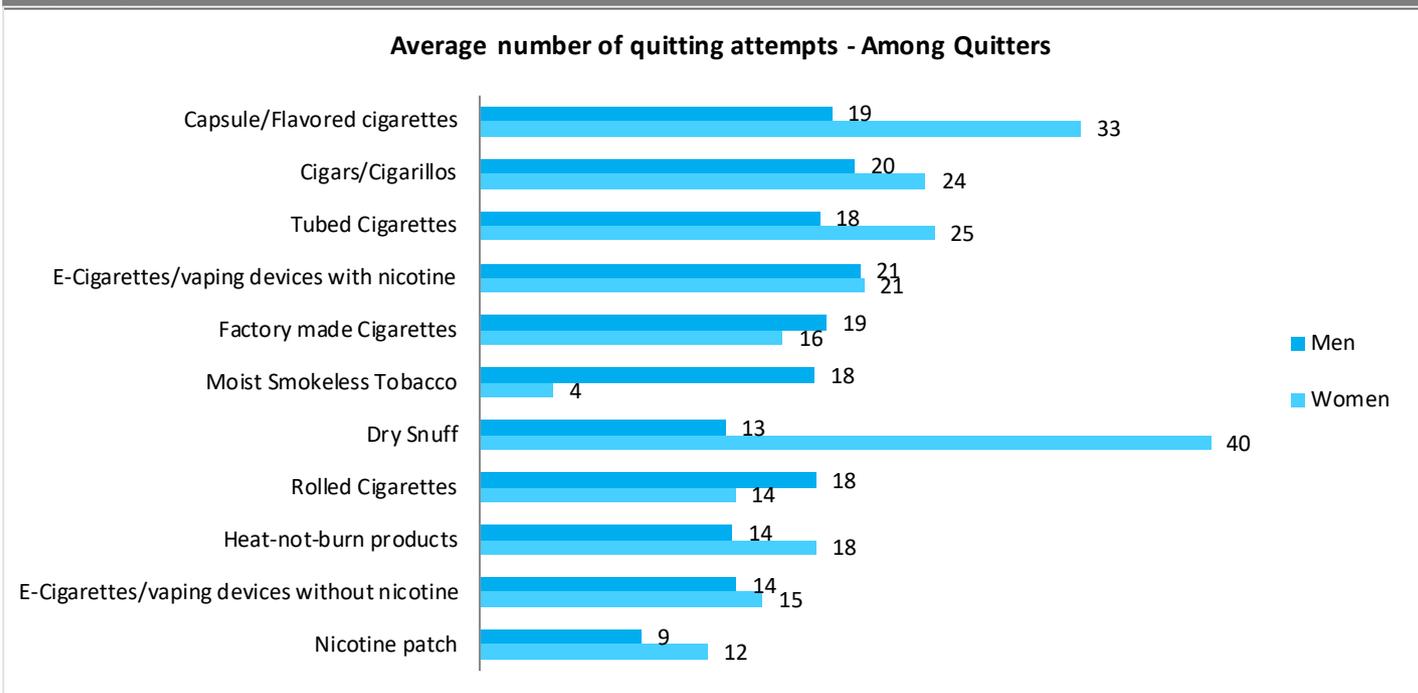
BB14. How many times did you try to quit consuming each of the following products before you succeeded?



Quitting Attempts by products : Among Quitters

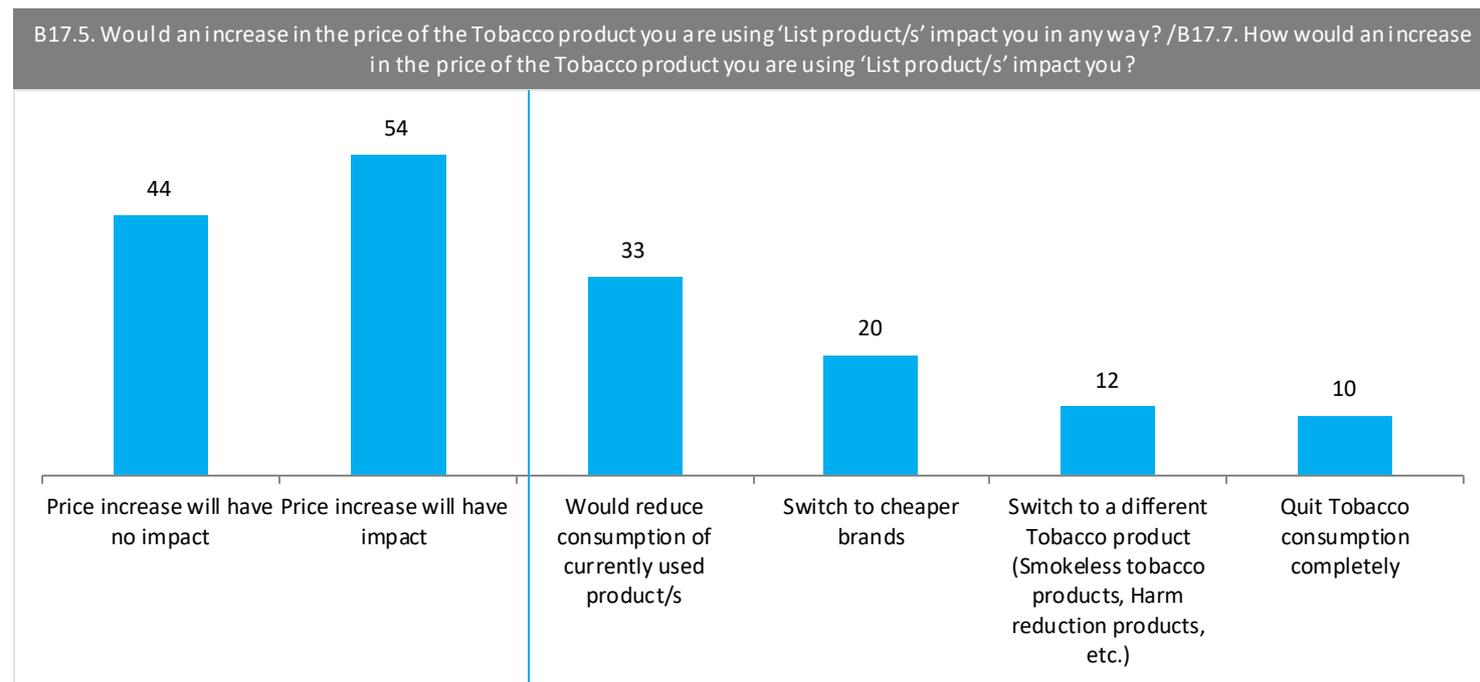
Across products, average attempts at quitting are more among women.

BB14. How many times did you try to quit consuming each of the following products before you succeeded?



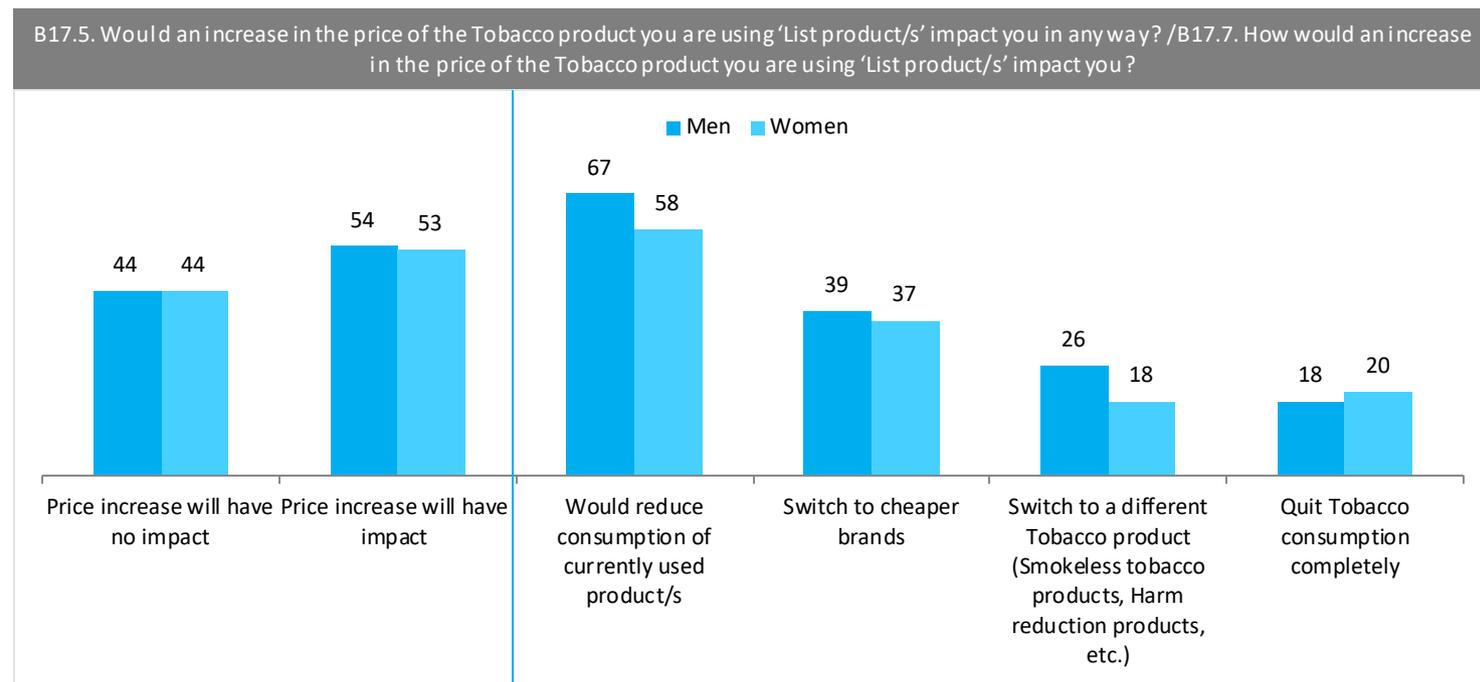
Impact of price increase of the tobacco products/other products

Every second consumer claimed that there will be an impact of the price increase; to cope with the price increase, the majority of them were planning to reduce consumption.



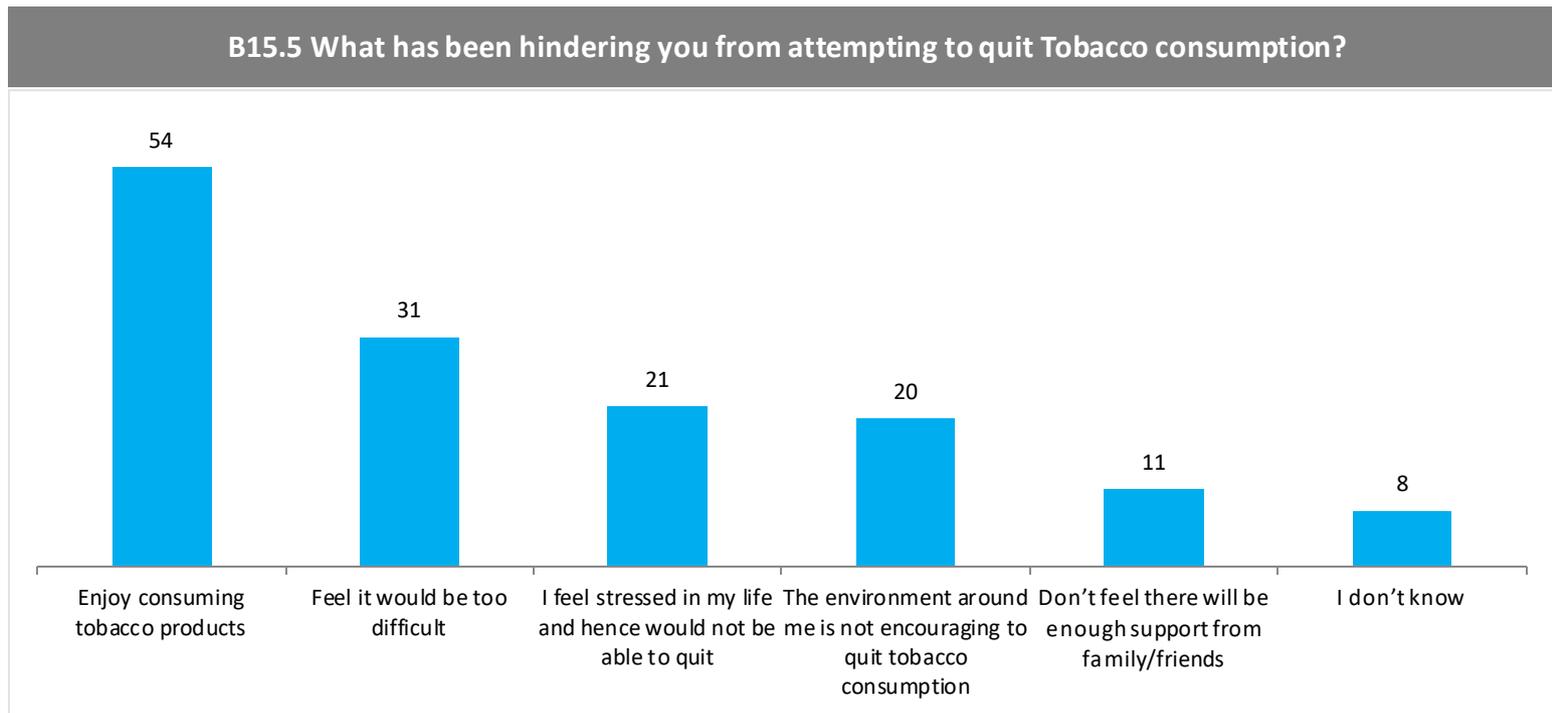
Impact of price increase of the tobacco products/other products

Among both men and women, every second consumer claimed that there will be an impact of the price increase; to cope with the price increase, the majority of them were planning to reduce consumption.



Hindrance in Quitting Tobacco Consumption

Over half (54%) of current tobacco users who are finding it difficult to quit say that they enjoy consuming tobacco with nearly a third (31%) saying it would be too difficult to quit

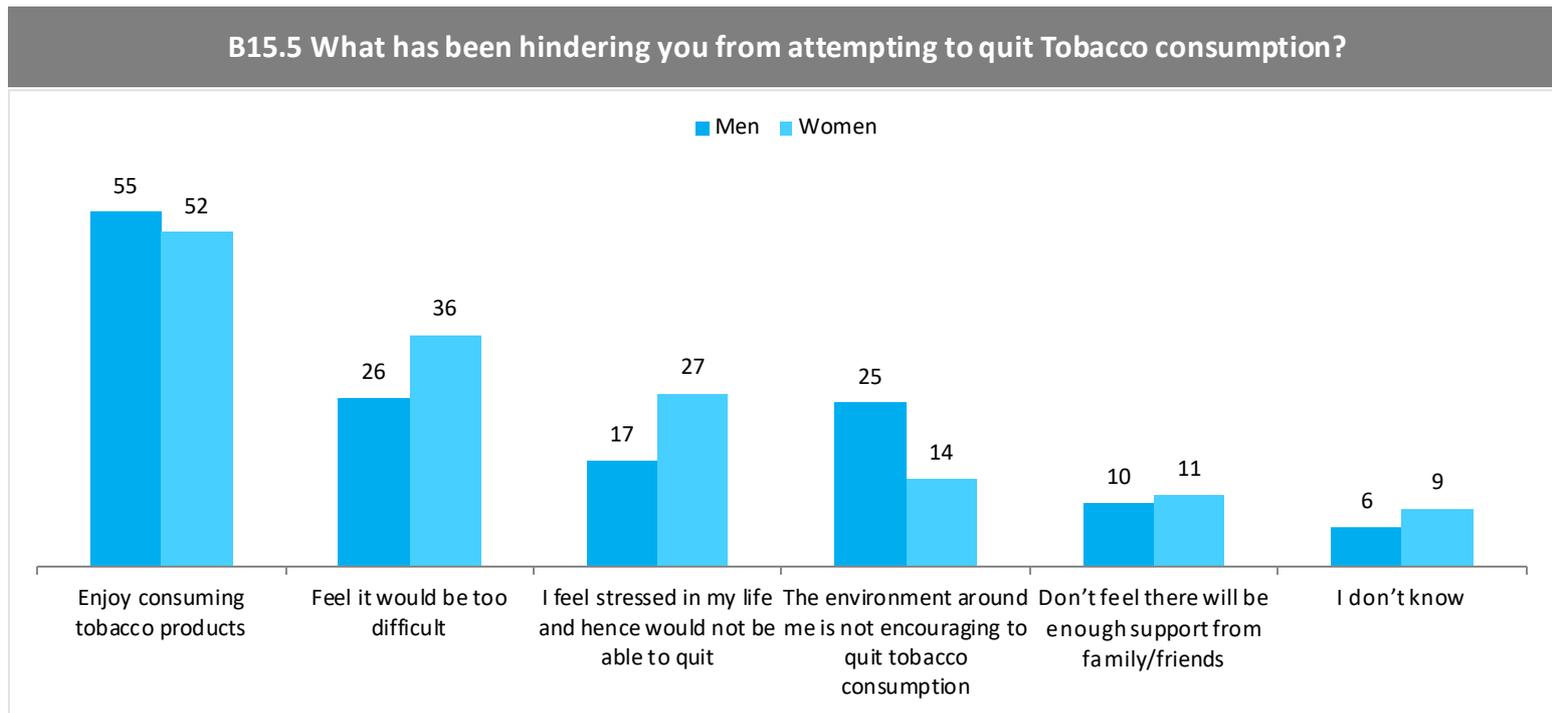


es are in %

: Random Sample, Current Users of tobacco products who are not planning to quit : n=512

Hindrance in Quitting Tobacco Consumption

Women opined relatively higher than Men that quitting would be too difficult.



in %

dom Sample, Current Users of tobacco products who are not planning to quit Men: n=271 Women: n=241

5. Appendix

Profile Comparison

Profile of current users and quitters				
	Current Users/ Vapers/ Smokers		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Education	892	990	147	220
Less than high school	1	1	0	0
Completed some high school	7	7	10	5
High school graduate	16	22	15	24
Job-specific training program(s) after high school	5	6	9	6
Some college, but no degree	14	21	14	23
Associate degree	4	5	3	4
Bachelor's degree (such as B.A., B.S.)	23	25	22	22
Some graduate school, but no degree	3	2	3	4
Graduate degree (such as MBA, MS, M.D., Ph.D.)	27	11	24	12

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n = 892 Women : n = 990, Quitters Men : n = 147 Women : n = 220

Profile Comparison

Profile of current users and quitters				
	Current Users/ Vapers/ Smokers		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Civil Status	892	990	147	220
Single	24	25	23	22
Unmarried, In a steady relationship and not living together	3	7	7	5
Unmarried, In a steady relationship and living together	13	21	7	20
Engaged	2	3	1	4
Married	50	32	52	40
Separated	2	2	2	2
Divorced	5	8	7	4
Widowed	2	2	1	4
Having Kids				
Have children at home below 14 living in the household	43	45	39	45
Don't have any children at home / No children below 14 living in the household	56	55	61	53

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n = 892 Women : n = 990, Quitters Men : n = 147 Women : n = 220

Profile Comparison

Profile of current users and quitters				
	Current Users/ Vapers/ Smokers		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Occupation	892	990	147	220
Working now	79	61	76	56
Only temporarily laid off, sick leave, or maternity leave	1	3	1	5
Looking for work, unemployed	5	5	3	4
Retired	7	6	14	6
Disabled, permanently, or temporarily	4	7	5	9
Keeping house	1	10	1	10
Student	3	7	1	7
Others	0	1	0	2

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n = 892 Women : n = 990, Quitters Men : n = 147 Women : n = 220

Profile Comparison

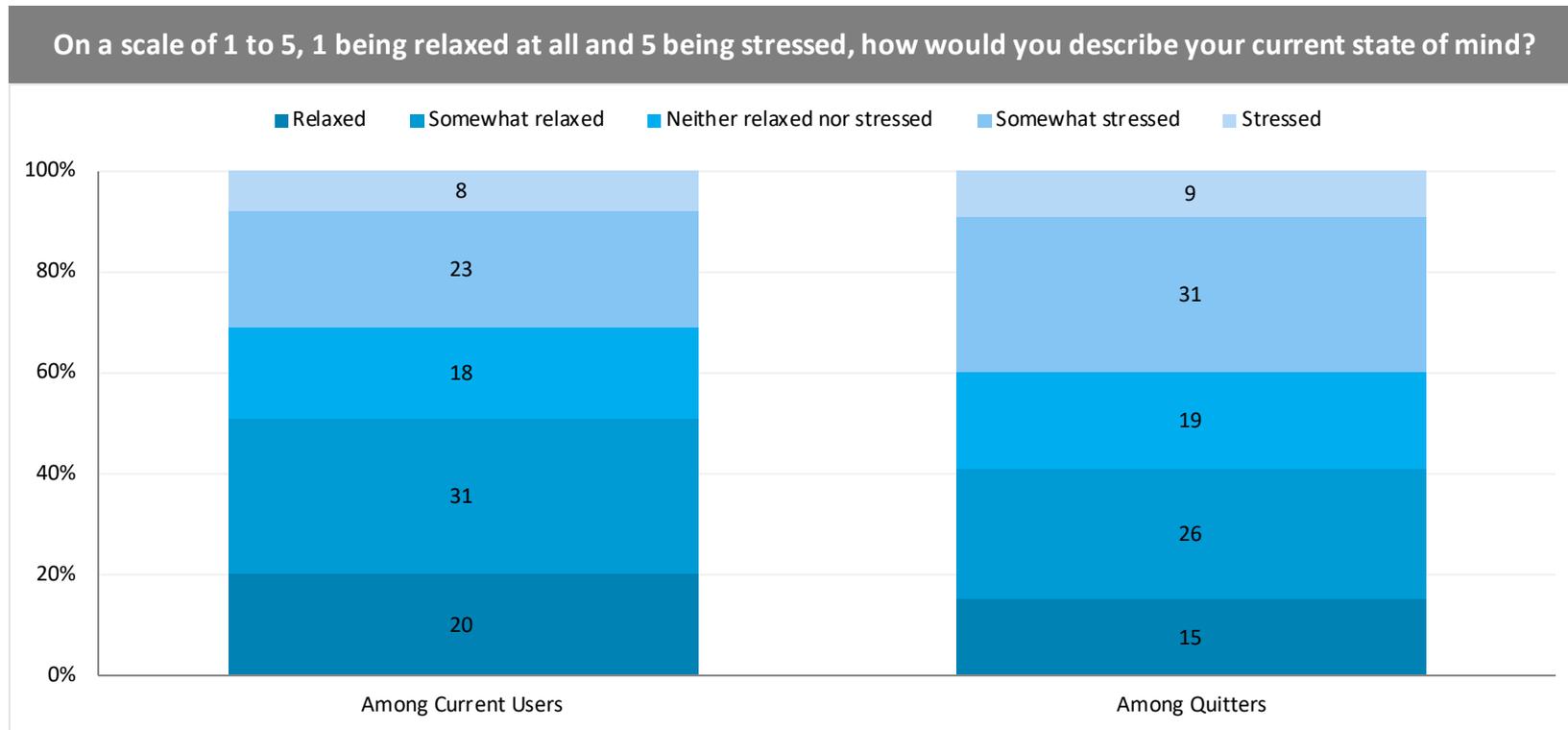
Profile of current users and quitters				
	Current Users/ Vapers/ Smokers		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Annual Income	892	990	147	220
Less than £10000	6	10	7	8
£10,000 - £14,999	8	9	9	10
£15,000 - £19,999	8	10	10	11
£20,000 - £29,999	14	21	14	18
£30,000 - £39,999	15	19	9	12
£40,000 - £49,999	10	9	14	12
£50,000 - £59,999	8	7	11	7
£60,000 - £69,999	29	11	25	14
During the last twelve months, would you say you had trouble paying your bills?				
No	68	61	69	64
Yes	31	37	31	33

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n = 892 Women : n = 990, Quitters Men : n = 147 Women : n = 220

Comparison between Users & Quitters

Current smokers have a more relaxed state of mind.

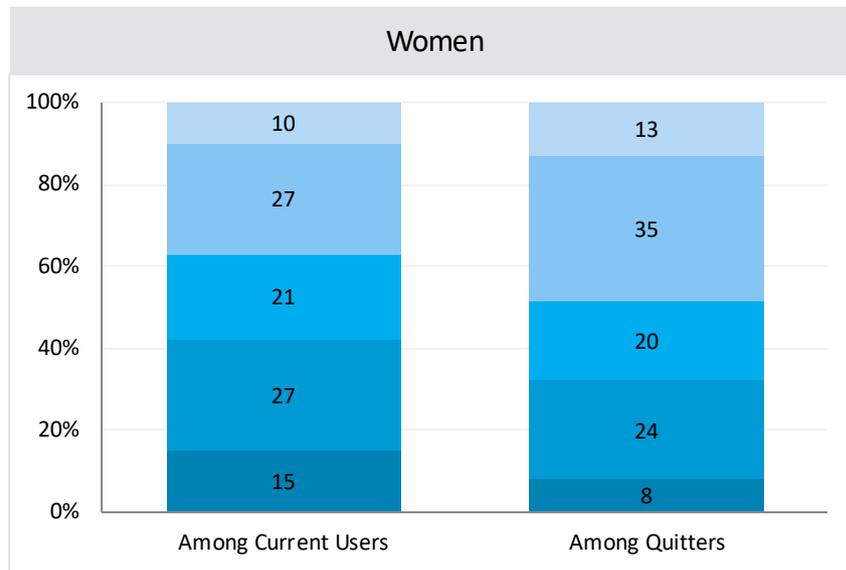
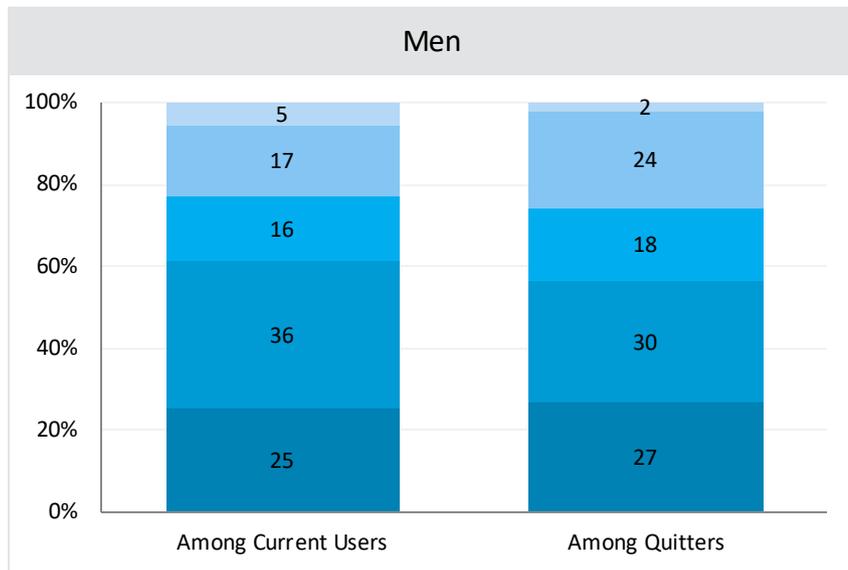


Comparison between Users & Quitters

Among both men and women, current smokers have a more relaxed state of mind.

On a scale of 1 to 5, 1 being relaxed at all and 5 being stressed, how would you describe your current state of mind?

■ Relaxed ■ Somewhat relaxed ■ Neither relaxed nor stressed ■ Somewhat stressed ■ Stressed



Figures are in %

Base: Random Sample, Current Users of tobacco products Men: n=892 Women: n=990, Quitters Men: n=147 Women: n=220

FOUNDATION FOR A
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