



FOUNDATION FOR A
SMOKE-FREE WORLD

GLOBAL STATE OF SMOKING POLL - 2019

UNITED STATES OF AMERICA

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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: 2311 online interviews

Target Group:

- Gender: Male/Female
- 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 among current tobacco and alternative product users (68%), followed by vaping devices with nicotine (37%). Heat-not-burn products were used by only 3% of current product users.
- 15% of current smokers claimed they started smoking cigarettes before the legal smoking age of 18 years. However, underage vaping is common (33%).
- The majority (74%) of current tobacco and alternative product users were familiar with e-cigarettes, but 59% have never heard of heat-not-burn products.
- The taste, enjoyment and satisfaction were key reasons selected for starting to use e-cigarettes or heat-not-burn products.

Beliefs and Perceptions Among Current Users

- An overwhelming majority of respondents believed smoking is harmful to their health (92%) as well as to others around them (83%). Half of all current users reported usually read the health warning labels on cigarette packages and 32% believed the labels are exaggerated.
- 55% of current users perceived vaping as less harmful than smoking tobacco.
- Among current users not using smokeless tobacco, 67% admitted they do not think they will use smokeless tobacco within the next 12 months.
- The majority of current users believed nicotine is harmful (88%) and addictive (91%). However, only half of them thought that the nicotine in vaping devices or nicotine replacement therapies cause cancer.

Quitting and Quitters

- The demographic profile of quitters was similar to that of current users.
- 74% of current users claimed they had attempted to quit tobacco/other products. However, only 27% said they were planning to quit.
- The harmful health effects of tobacco was by far the main reason selected for quitting or attempting to quit (current users: 61%, quitters: 73%).
- 60% of current users claimed that a price increase would impact their tobacco consumption behavior. Half of them said they would reduce consumption if prices increased.
- Current users reported the enjoyment from consuming tobacco products (60%) as the main hindrance to quitting. However, stress (30%) and difficulty in quitting (28%) were also key factors cited.
- Multiple quitting attempts suggested that quitting is a tough process.

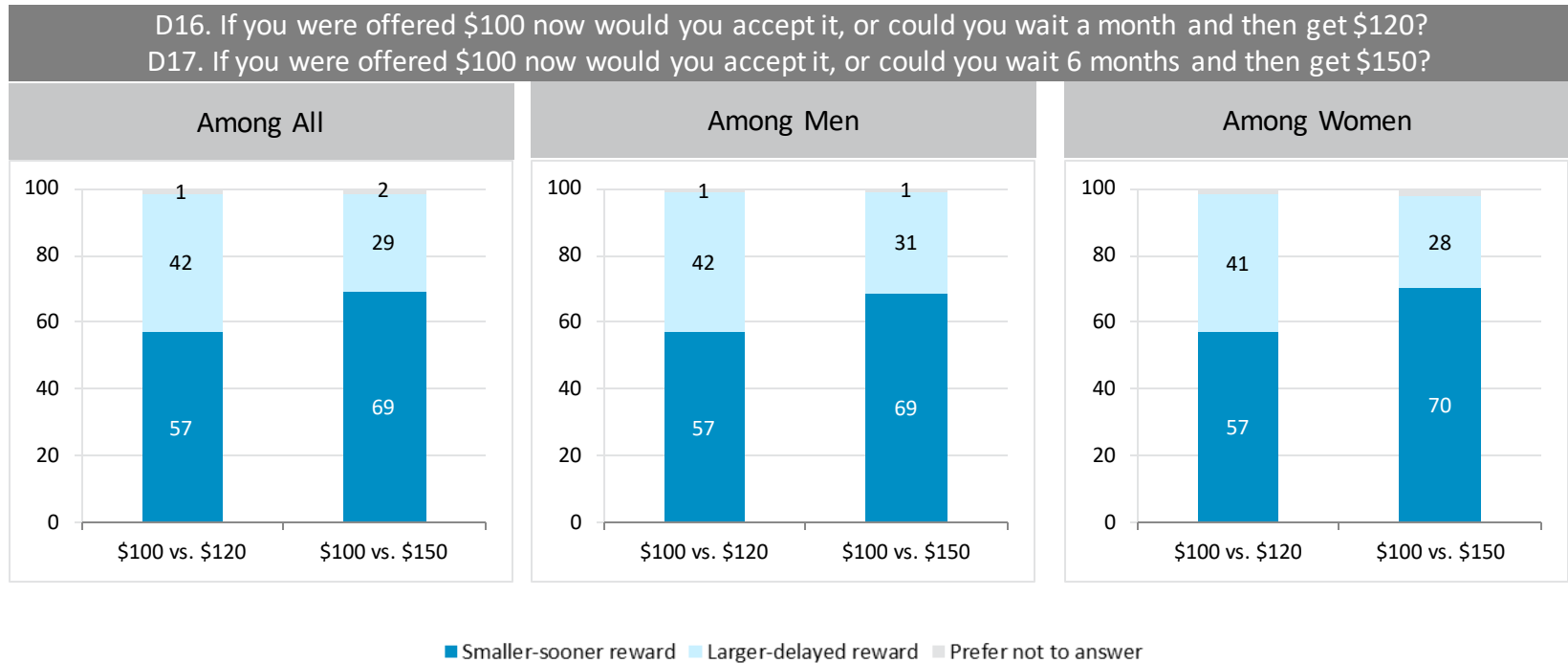
4. DETAILED FINDINGS

Achieved Sample : Quantitative Module

Sample by Demographics		
	n	%
All	2311	100
Men	1229	53
Women	1075	47
Others	7	0
18-24yrs	262	11
25-35yrs	726	31
36-50 yrs	721	31
51-69 yrs	602	26
Rural area or village	397	17
Small or middle sized town	710	31
Large town	353	15
City	833	36
Current users of tobacco and other products	2030	88
Quitters (who quit tobacco in last 5 years)	281	12

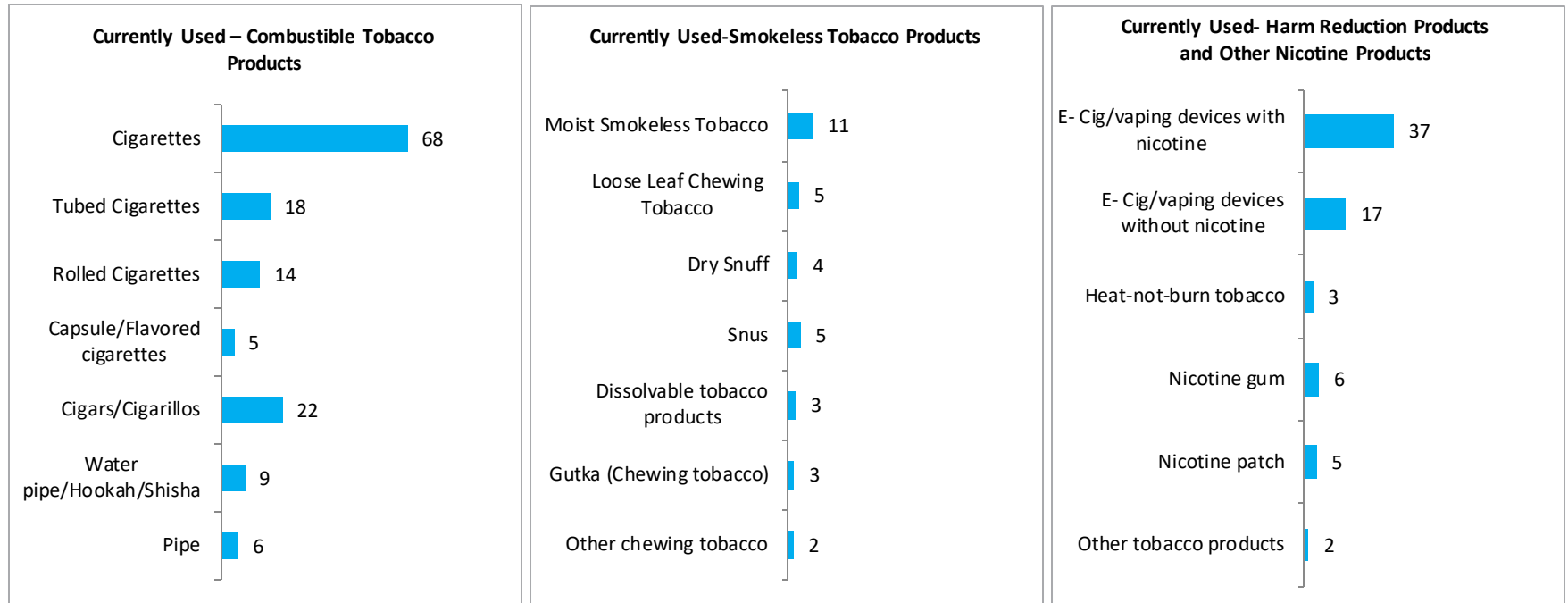
Smaller-sooner reward vs. Larger- delayed reward

Respondents prefer more immediate gratification, with a majority opting for a smaller-sooner reward, particularly when the original reward amount is higher, but the wait time is longer.



4.1 Usage details of various tobacco products and other alternative products

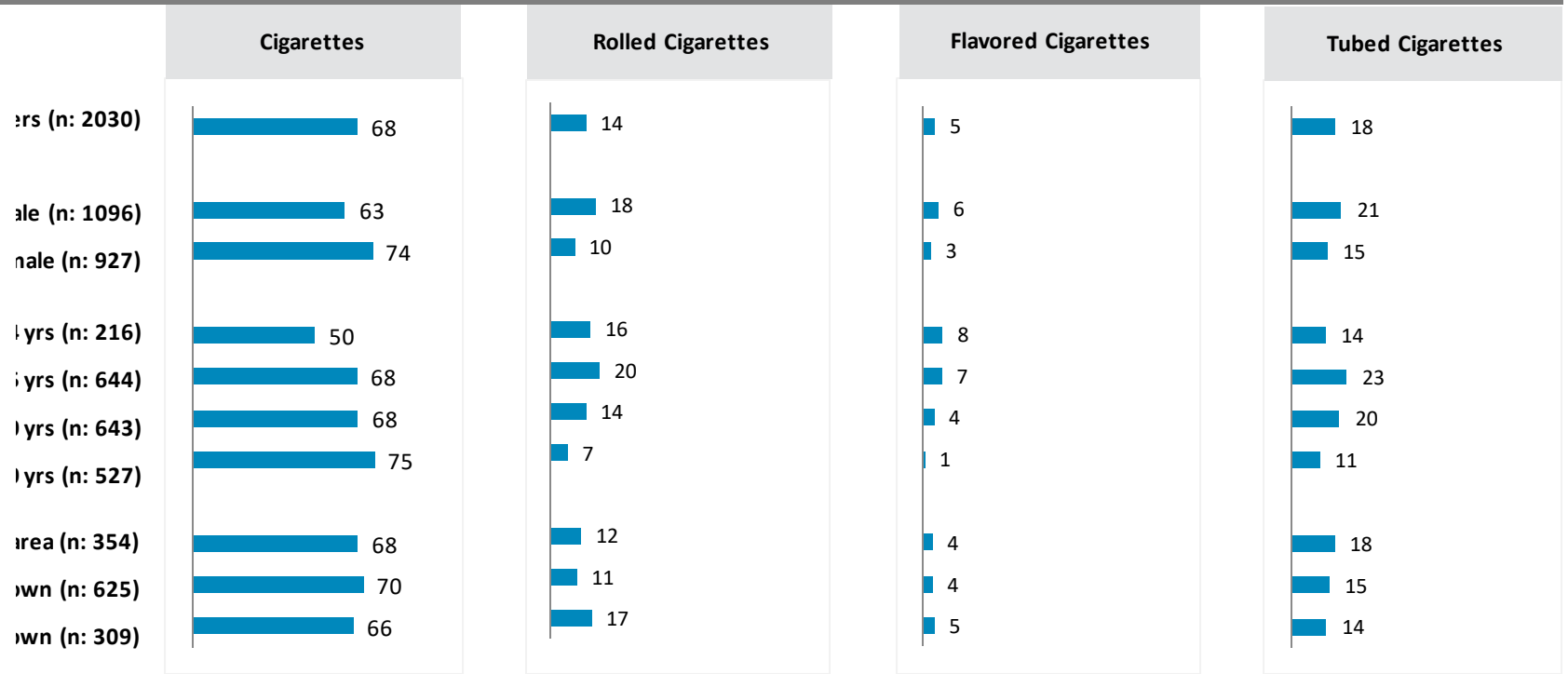
Current usage of products



Figures are in %
 Base : Random Sample, Users : n= 2030
 Q. C1. Of the following Tobacco products, which products are you currently consuming? (Select all that apply)

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.

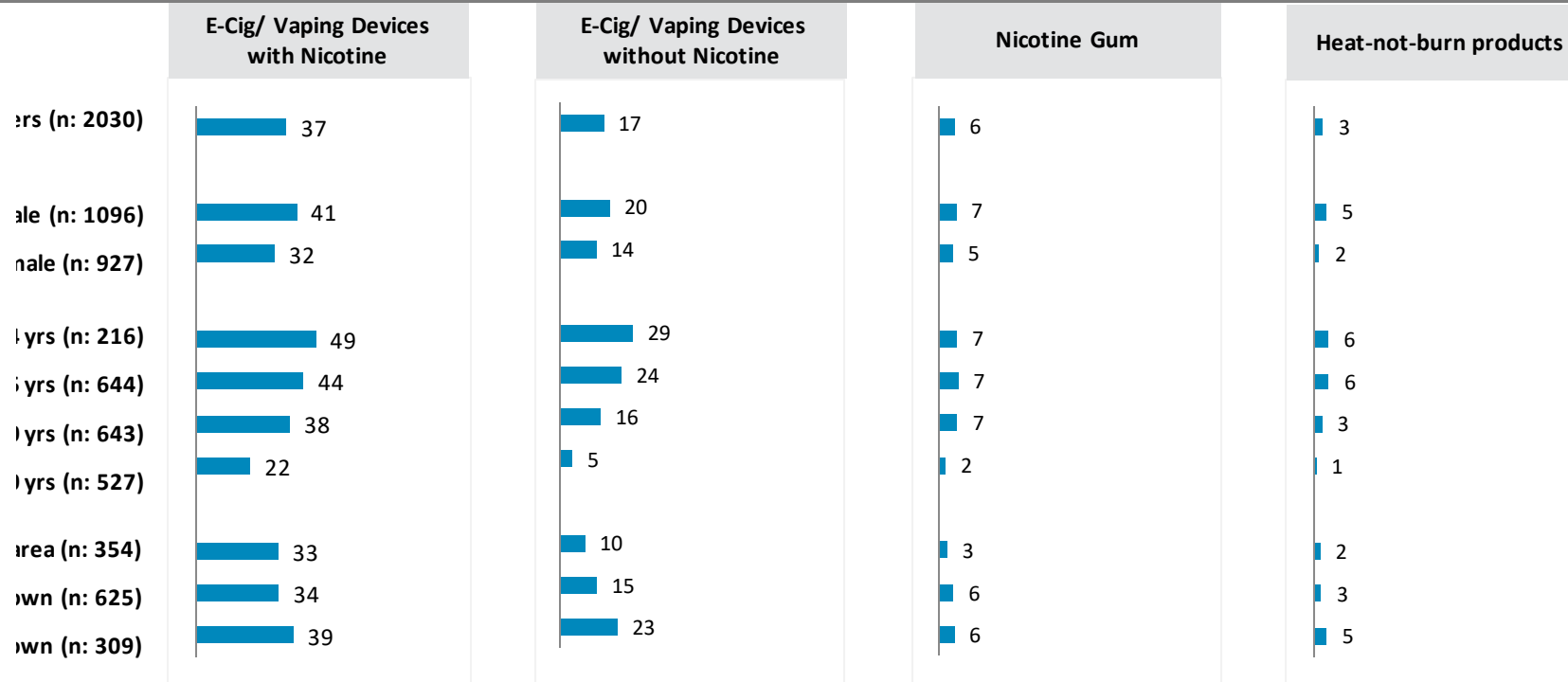
C1. Of the following products, which products are you currently consuming?



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)

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)

Usage at a glance : Cigarettes (1/2)

Cigarettes

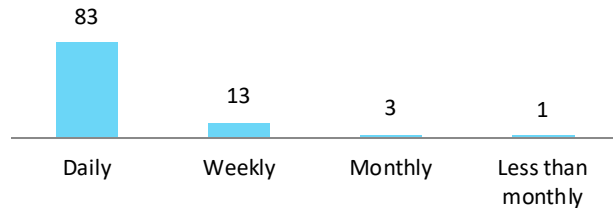
Current Usage (Among all users of tobacco and other products)

68% of current smokers smoke Cigarettes

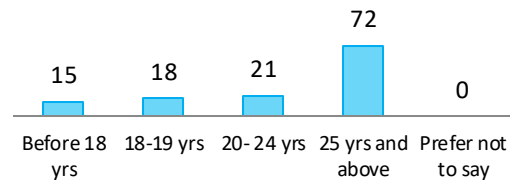
29% are solo smokers, they smoke only cigarettes

39% are dual/poly users of Cigarettes

Consumption Frequency



Age of Starting Cigarette Smoking



Figures are in %

Base : Random Sample, Current users of Cigarettes : n= 1375

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. (Dollars)
All Current users of tobacco/other products	68	18	83	141
Male (n: 1096)	63	18	82	142
Female (n: 927)	74	18	85	140
18-24 yrs (n: 216)	50	17	70	85
25-35yrs (n: 644)	68	18	80	134
36-50yrs (n: 643)	68	18	83	149
51- 69 yrs (n: 527)	75	19	91	151
Rural (n: 354)	68	17	86	146
Small Town (n: 625)	70	18	83	141
Large Town (n: 309)	66	17	85	123

Figures are in %

Base : Random Sample, Current users: n= 2030

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

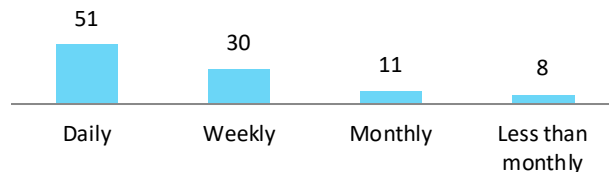
Usage at a glance : Rolled cigarettes (1/2)

Rolled Cigarettes - Cigarettes that I roll myself with my hands

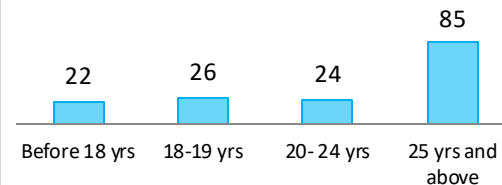
Current Usage (Among all users of tobacco and other products)

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

Consumption Frequency



Age of Starting Rolled Cigarette Smoking



Percentages are in %

Source: Random Sample, Current users of Rolled Cigarettes : n= 291

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

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

Rolled Cigarettes - Cigarettes that I roll myself with my hands				
	% 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.(Dollars)
All Current users of tobacco/other products	14	21	51	73
Male (n: 1096)	18	20	55	84
Female (n: 927)	10	22	43	51
18-24 yrs (n: 216)	16	16	34	49
25-35yrs (n: 644)	20	19	50	71
36-50yrs (n: 643)	14	23	55	86
51- 69 yrs (n: 527)	7	28	59	75
Rural (n: 354)	12	19	59	77
Small Town (n: 625)	11	22	43	63
Large Town (n: 309)	17	19	45	86

Figures are in %

Base : Random Sample, current users n= 2030

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

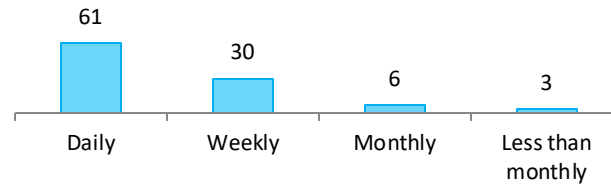
Current Usage (Among all users of tobacco and other products)

37% of current users use Electronic cigarettes/vaping devices with nicotine

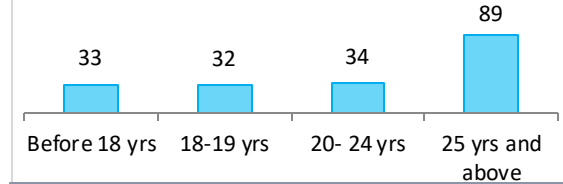
6% are solo users, use only E-Cig/ Vaping devices with nicotine

31% are dual/poly users of E-Cig/ Vaping devices with nicotine

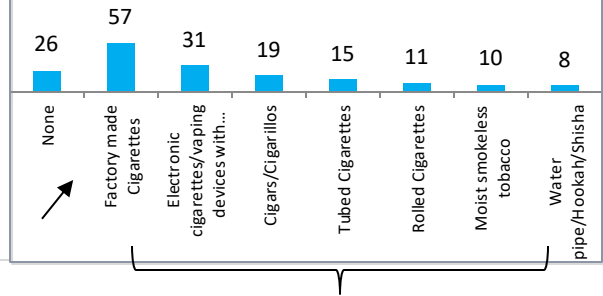
Consumption Frequency



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



What product were you consuming prior to E-Cigarettes?



: in %

lom Sample, Current users of E-cigarettes/ vaping devices with Nicotine : n= 748

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?

ou 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 (Dollars)
All Current users of tobacco/other products	37	32	61	62
Male (n: 1096)	41	30	62	61
Female (n: 927)	32	34	59	63
18-24 yrs (n: 216)	49	18	56	50
25-35yrs (n: 644)	44	25	61	65
36-50yrs (n: 643)	38	36	62	63
51- 69 yrs (n: 527)	22	50	61	60
Rural (n: 354)	33	36	61	55
Small Town (n: 625)	34	32	59	60
Large Town (n: 309)	39	32	66	69

Figures are in %

Base : Random Sample, current users n= 2030

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

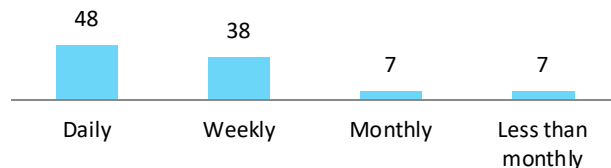
Usage at a glance : Flavored Cigarettes (1/2)

Capsule/Flavored cigarettes

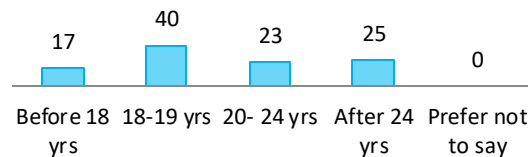
Current Usage (Among all users of tobacco and other products)

- 5%** of current smokers smoke Flavored Cigarettes
- 0.2%** are solo smokers, they smoke only flavored cigarettes
- 4.8%** are dual/poly users of Flavored Cigarettes

Consumption Frequency



Age of Starting Flavored Cigarette Smoking



Percentages are in %

Source: Random Sample, Current users of Flavored Cigarettes : n= 96

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?

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

Capsule/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. (Dollars)
All Current users of tobacco/other products	5	21	48	69
Male (n: 1096)	6	21	54	59
Female (n: 927)	3	20	34	99
18-24 yrs (n: 216)	8	18	35	48
25-35yrs (n: 644)	7	19	56	68
36-50yrs (n: 643)	4	24	43	89
51- 69 yrs (n: 527)	1	Very low base (below 15)		
Rural (n: 354)	4	Very low base (below 15)		
Small Town (n: 625)	4	21	43	64
Large Town (n: 309)	5	23	57	108

Figures are in %

Base : Random Sample, current users n= 2030

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

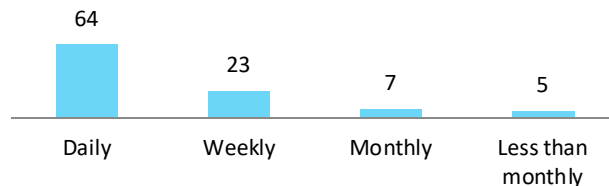
Usage at a glance : Tubed Cigarettes (1/2)

Tubed Cigarettes

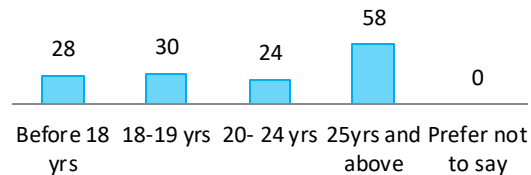
Current Usage (Among all users of tobacco and other products)

- 18%** of current smokers smoke Tubed Cigarettes
- 3%** are solo smokers, they smoke only tubed cigarettes
- 15%** 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= 362

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. (Dollars)
All Current users of tobacco/other products	18	23	64	86
Male (n: 1096)	21	22	63	92
Female (n: 927)	15	25	65	78
18-24 yrs (n: 216)	14	17	53	61
25-35yrs (n: 644)	23	19	63	95
36-50yrs (n: 643)	20	24	59	80
51- 69 yrs (n: 527)	11	31	82	91
Rural (n: 354)	18	24	65	113
Small Town (n: 625)	15	24	65	52
Large Town (n: 309)	14	20	55	101

Figures are in %

Base : Random Sample, current users n= 2030

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

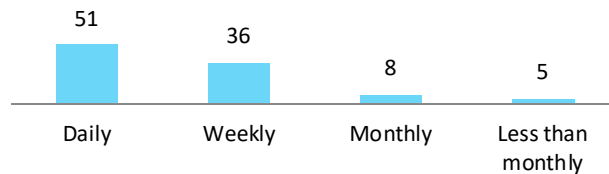
Usage at a glance : Electronic cigarettes/vaping devices without nicotine (1/2)

Electronic cigarettes/vaping devices without nicotine

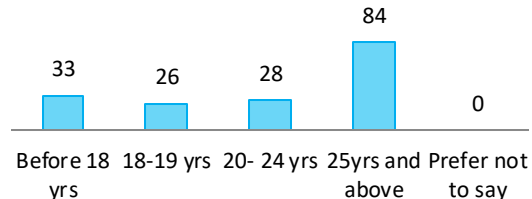
Current Usage (Among all users of tobacco and other products)

- 17%** of current users use Electronic cigarettes/vaping devices without nicotine
- 1%** are solo users, use only E-Cig/ Vaping devices without nicotine
- 16%** are dual/poly users of E-Cig/ Vaping devices without nicotine

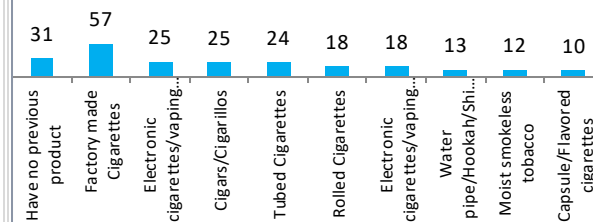
Consumption Frequency



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 = 348

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 (Dollars)
All Current users of tobacco/other products	17	27	51	65
Male (n: 1096)	20	26	54	71
Female (n: 927)	14	30	46	55
18-24 yrs (n: 216)	29	18	45	52
25-35yrs (n: 644)	24	23	53	66
36-50yrs (n: 643)	16	33	56	76
51- 69 yrs (n: 527)	5	50	33	50
Rural (n: 354)	10	26	51	64
Small Town (n: 625)	15	29	49	62
Large Town (n: 309)	23	32	53	59

Figures are in %

Base : Random Sample, current users n= 2030

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

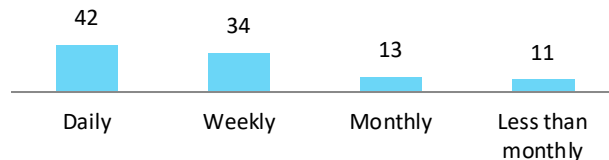
Usage at a glance : Nicotine Gum (1/2)

Nicotine Gum

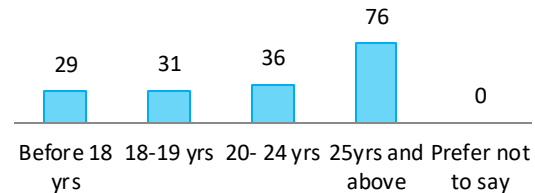
Current Usage (Among all users of tobacco and other products)

- 6% of current smokers use Nicotine Gum
- 0% are solo smokers, they use only Nicotine Gum
- 6% 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= 122

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'.
Question: 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 (Dollars)
All Current users of tobacco/other products	6	28	42	53
Male (n: 1096)	7	26	49	45
Female (n: 927)	5	30	32	62
18-24 yrs (n: 216)	7	17	40	31
25-35yrs (n: 644)	7	22	44	52
36-50yrs (n: 643)	7	33	43	57
51- 69 yrs (n: 527)	2	43	31	65
Rural (n: 354)	3	28	36	37
Small Town (n: 625)	6	28	46	32
Large Town (n: 309)	6	29	17	60

Figures are in %

Base : Random Sample, current users n= 2030

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

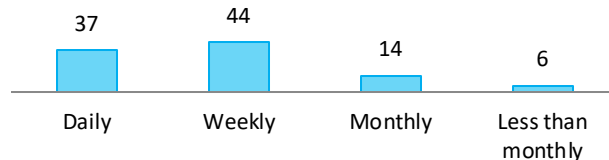
Usage at a glance : Heat-not-burn products (1/2)

Heat-not-burn Products

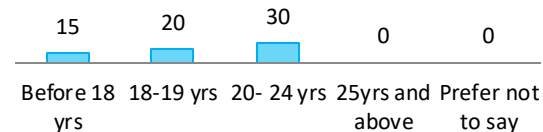
Current Usage (Among all users of tobacco and other products)

- 3%** of current users use Heat-not- burn products
- 0%** are solo users, hence, all
- 3%** are dual/poly users Heat-not- burn products

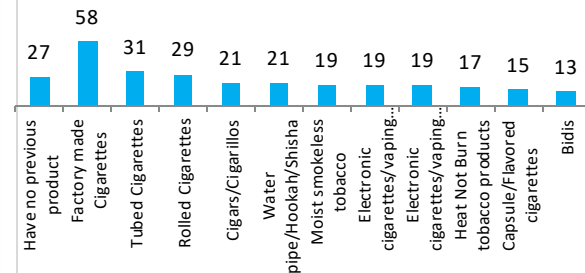
Consumption Frequency



Age of starting using HNB



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



n %

m Sample, Current users of Heat-not burn products: n= 71

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 (Dollars)
All Current users of tobacco/other products	3	22	37	48
Male (n: 1096)	5	22	38	43
Female (n: 927)	2	24	33	63
18-24 yrs (n: 216)	6	19	42	20
25-35yrs (n: 644)	6	20	41	59
36-50yrs (n: 643)	3	25	21	35
51- 69 yrs (n: 527)	1	Very low base (below 15)		
Rural (n: 354)	2	Very low base (below 15)		
Small Town (n: 625)	3	21	41	28
Large Town (n: 309)	5	23	27	42

Figures are in %

Base : Random Sample, current users n= 2030

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'?

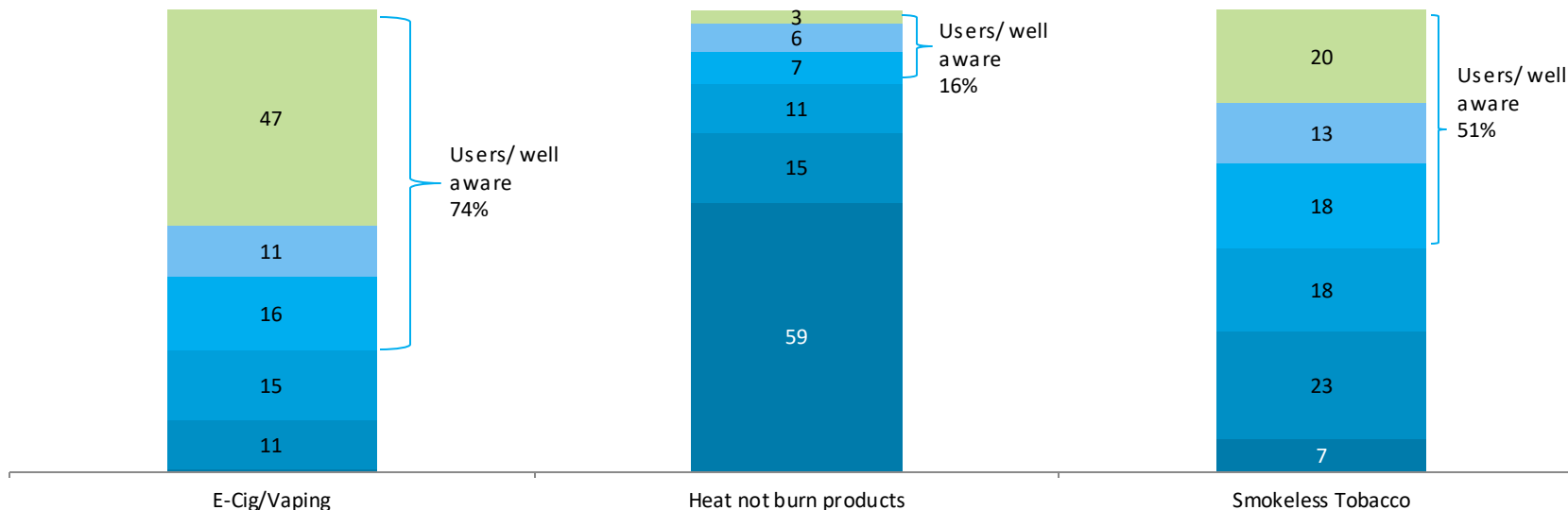
C5. Approximately, how much money do you spend on 'Show Tobacco Product' in a typical week? This has been converted into monthly spends

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

74% of current users of tobacco/ other products are users of E-Cig/Vaping or well aware/know a fair amount about it. Smokeless Tobacco usage/awareness is relatively high (51%), with HNB usage/awareness significantly lower.

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

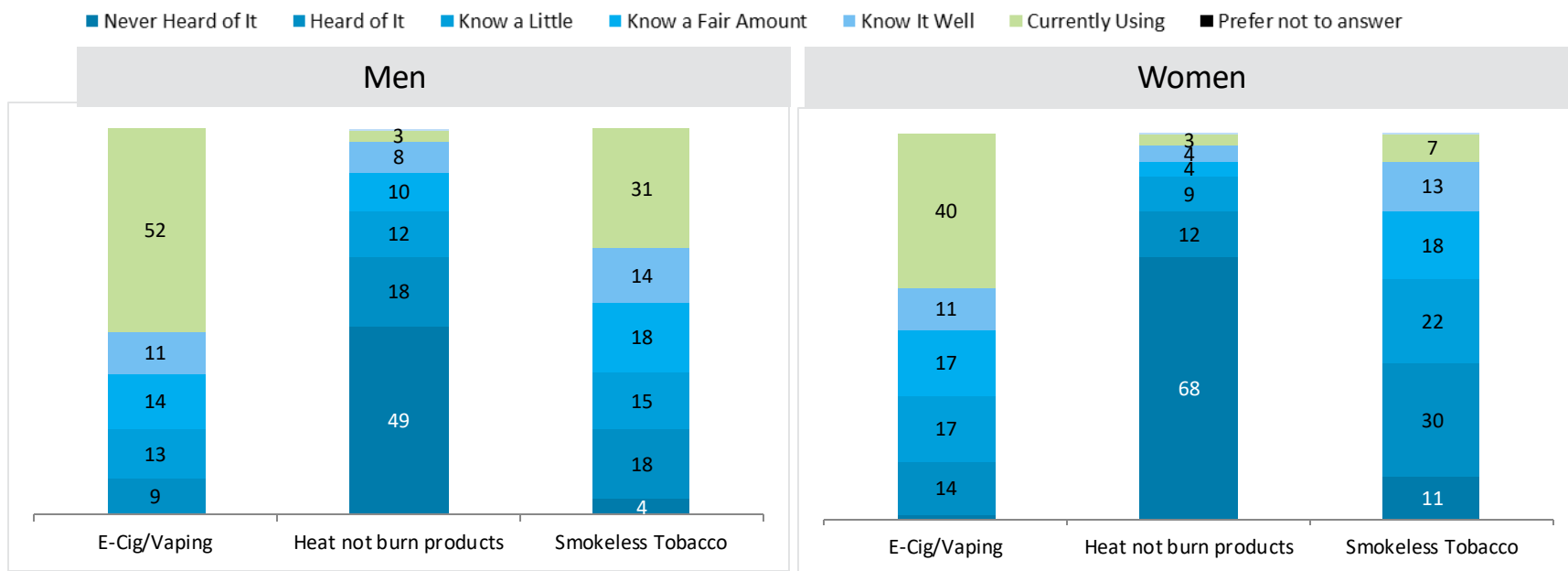
■ Never Heard of It
 ■ Heard of It
 ■ Know a Little
 ■ Know a Fair Amount
 ■ Know It Well
 ■ Currently Using
 ■ Prefer not to answer



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

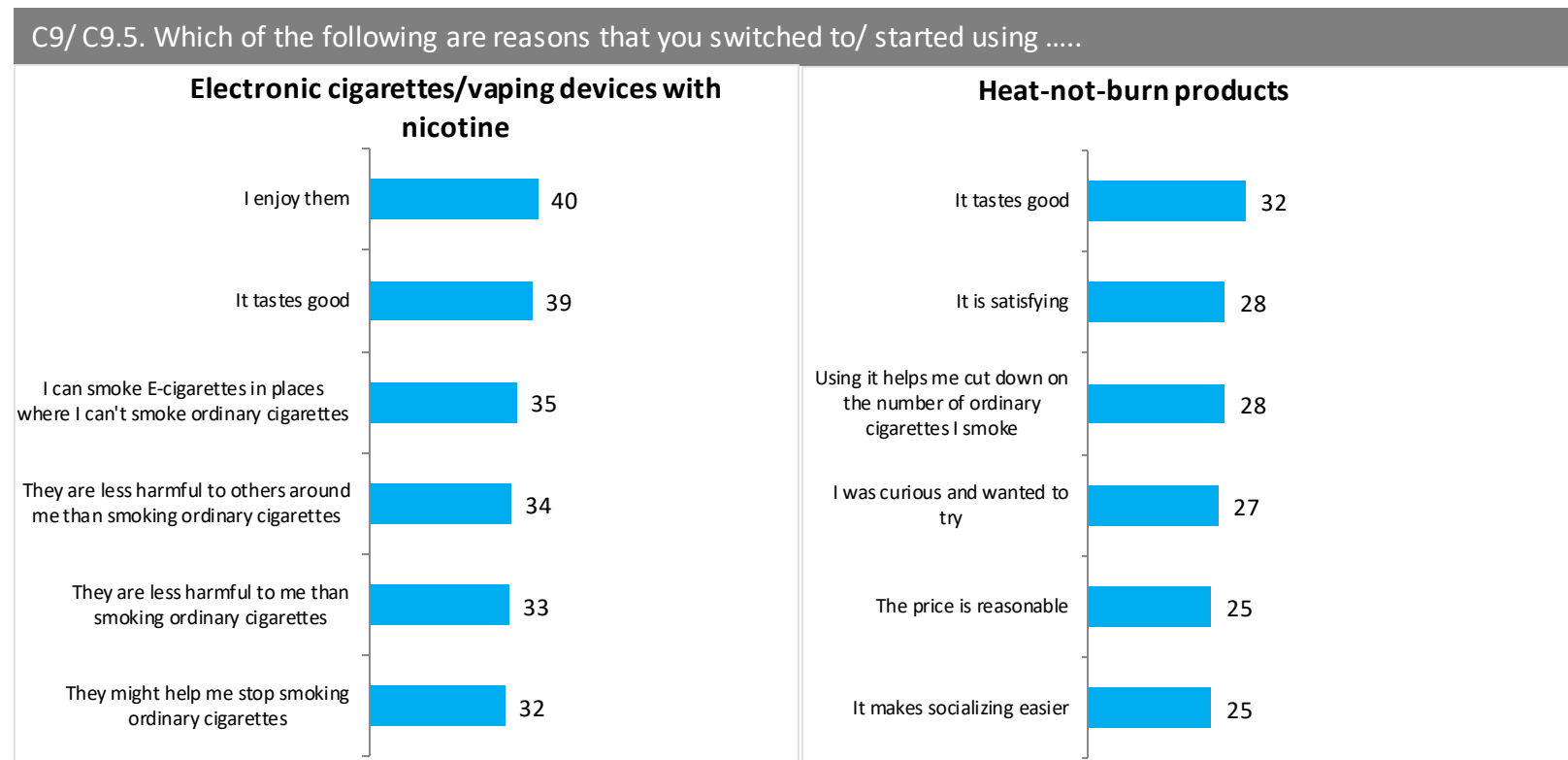
Usage/familiarity of both E-cig/Vaping, as well as Smokeless Tobacco is much higher among men.

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



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

Enjoyment and good taste are the main reasons to start using E-cig/Vaping, whereas, good taste and satisfying are the main reasons to start using Heat-not-burn products.

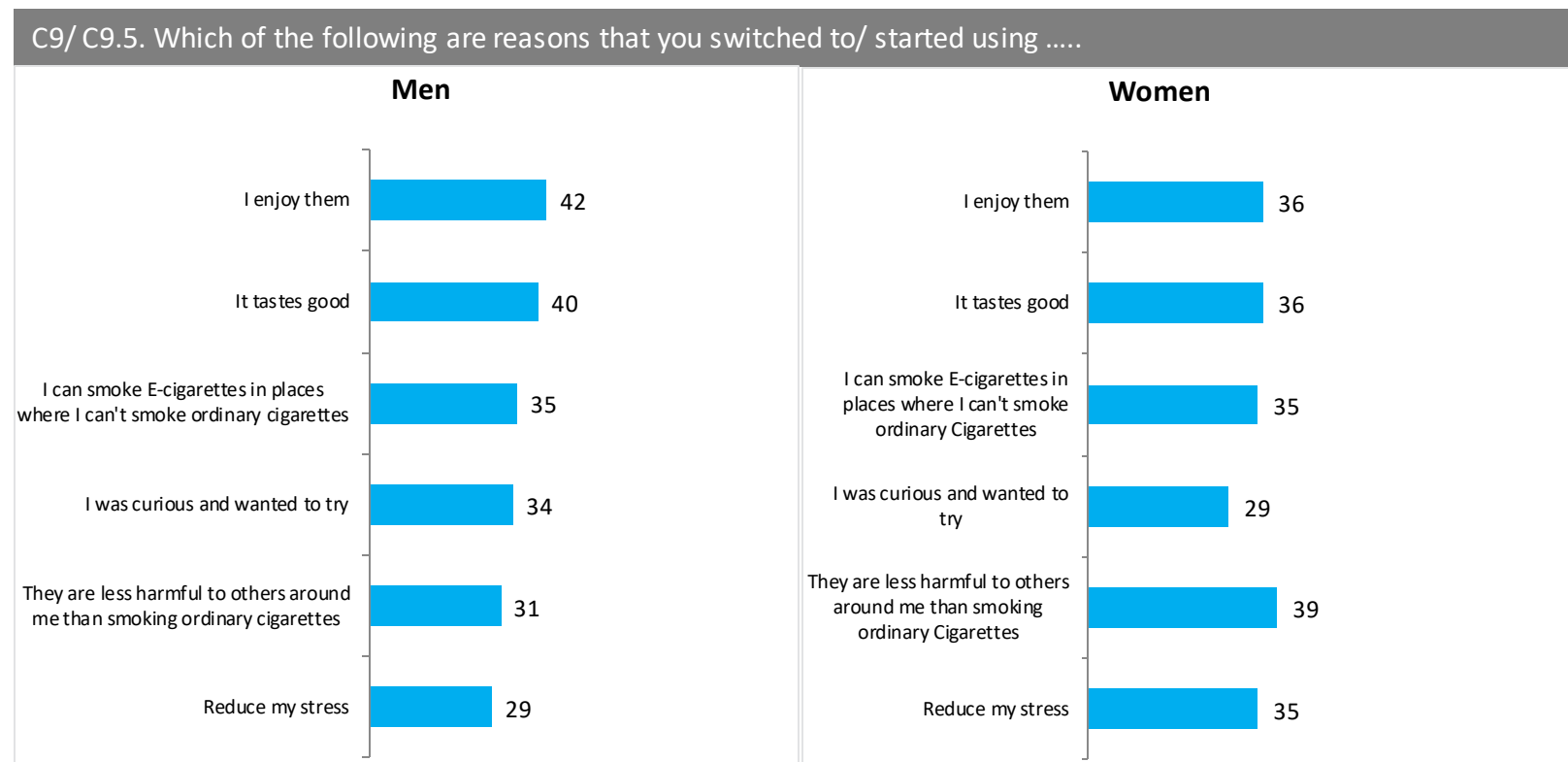


Figures are in %

Base : Random Sample, Current users of E-Cig/ Vaping devices : n: 928 Current users of Heat-not-burn products : n= 71

Reasons for start using E-Cigarettes

Among men, enjoyment and taste are the major reasons to start using E-Cigarettes/Vaping. 39% of women feel they're less harmful to both themselves, as well as to others around them.



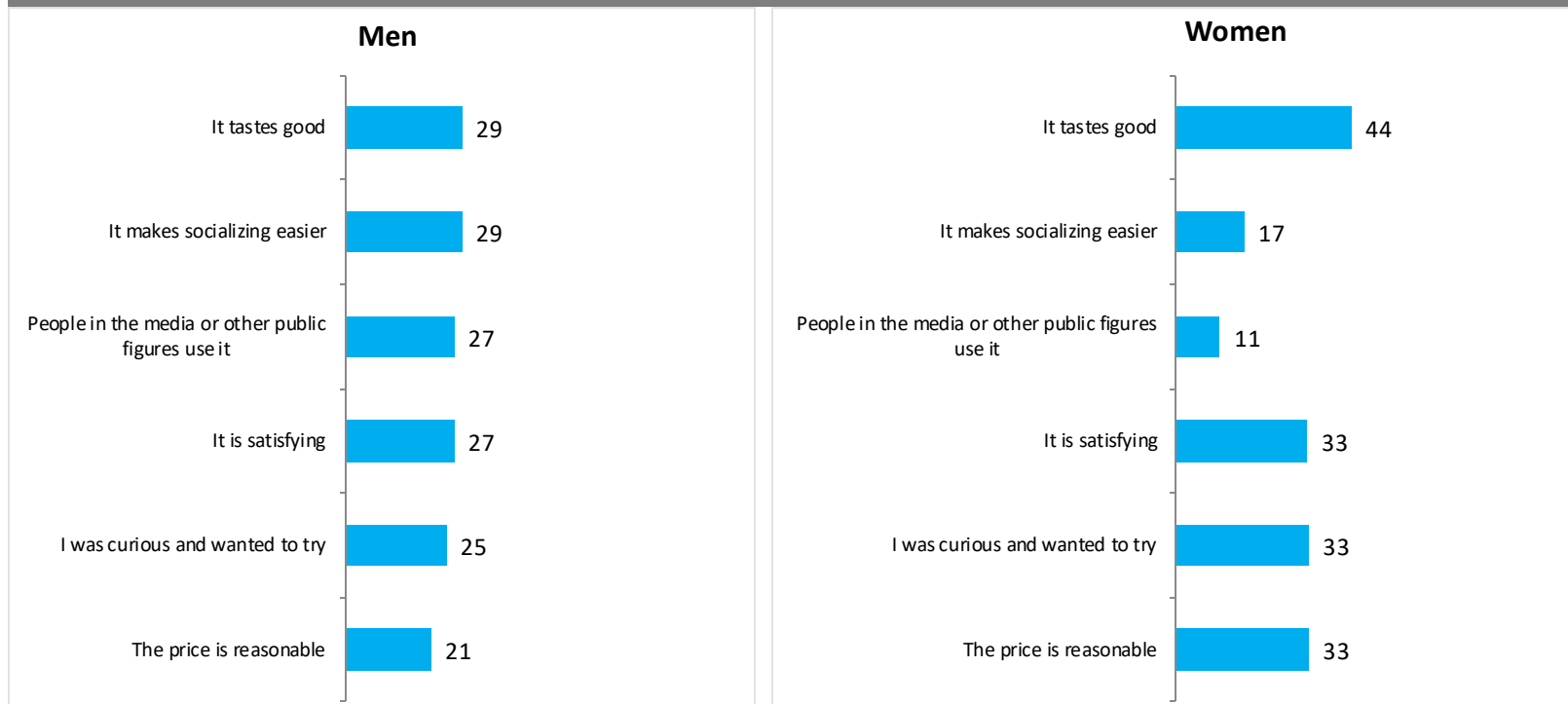
Figures are in %

Base : Random Sample, Current users of E-Cig/ Vaping devices : n: 928 Current users of Heat-not-burn products : n= 71

Reasons for start using Heat-not-burn products

Among both men and women, good taste is one of the major reasons to start using Heat-not-burn 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=52 Women : n= 18* (small base size)

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.*

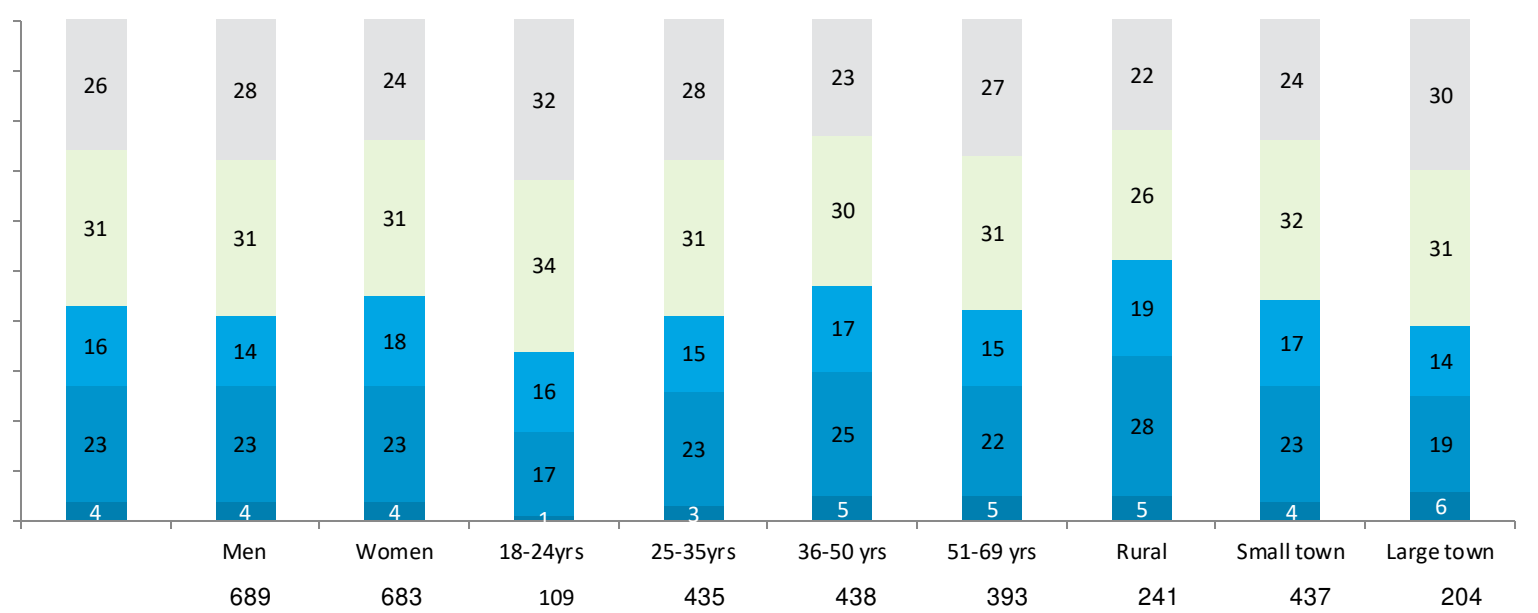
How to calculate Fagerstrom score**

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

The level of nicotine dependency is high among current users of Cigarettes, Rolled Cigarettes & Tubed Cigarettes.

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	1375	291	748	96	362	348	122	71
C.10 How soon after you wake up do you smoke your first cigarette/consume your first nicotine product?								
Within 5 minutes (3)	27	24	25	8	25	16	21	3
6-30 minutes(2)	29	25	27	23	26	20	21	20
31-60 minutes(1)	23	31	24	34	28	31	36	51
C11. Find it difficult to refrain from smoking/consuming tobacco in places where it is forbidden (1)	45	58	47	60	56	51	63	59
C12. Hate to give up the first one in the morning (1)	62	75	62	70	67	68	74	66
C14. Consume more frequently during the first hour (1)	55	69	53	71	72	62	74	75
C15. Consume even if you are ill (1)	51	64	52	59	63	54	68	63
Average Scores (1-7)	4.3	4.2	3.7	3.6	4.1	3.5	4.2	3.6

* 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.

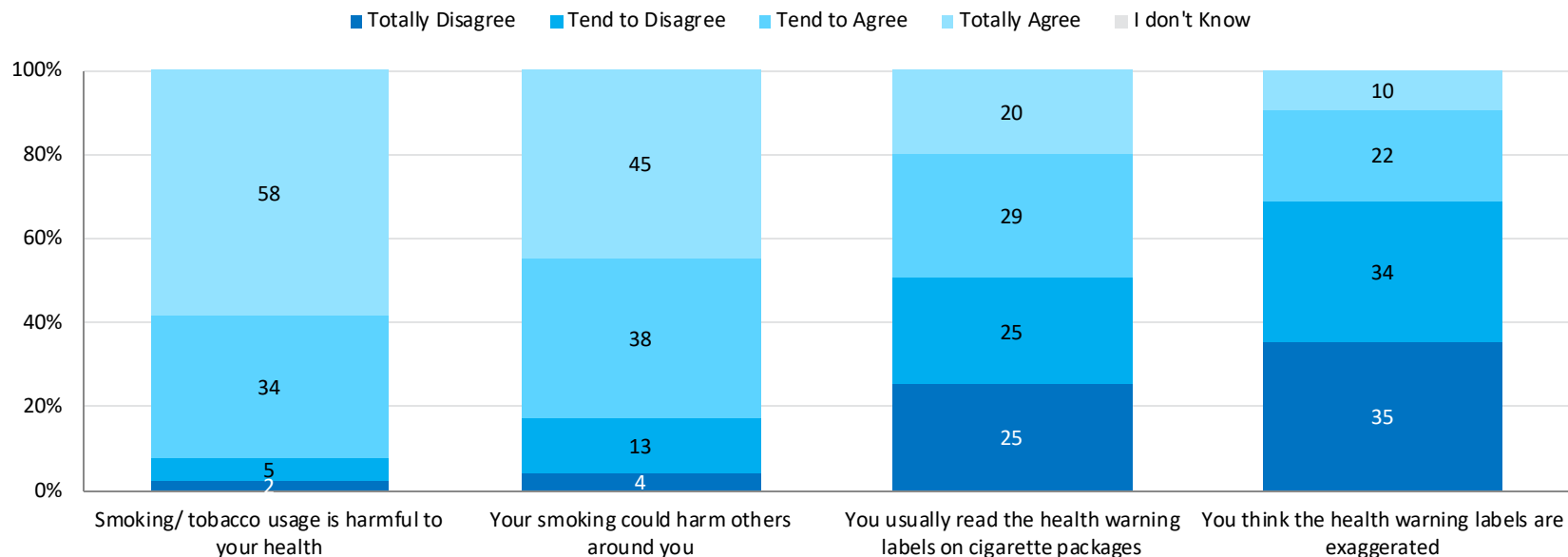
4.2 Beliefs and Perception : Among Current Users/Vapers/ Smokers

Beliefs and perceptions about smoking- Current users

92% of current users of tobacco products/other products believe smoking is harmful to their health.

One-half of current users claim they do not read the health warning labels on cigarette packages, with 32% of the users feel the warnings are exaggerated.

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

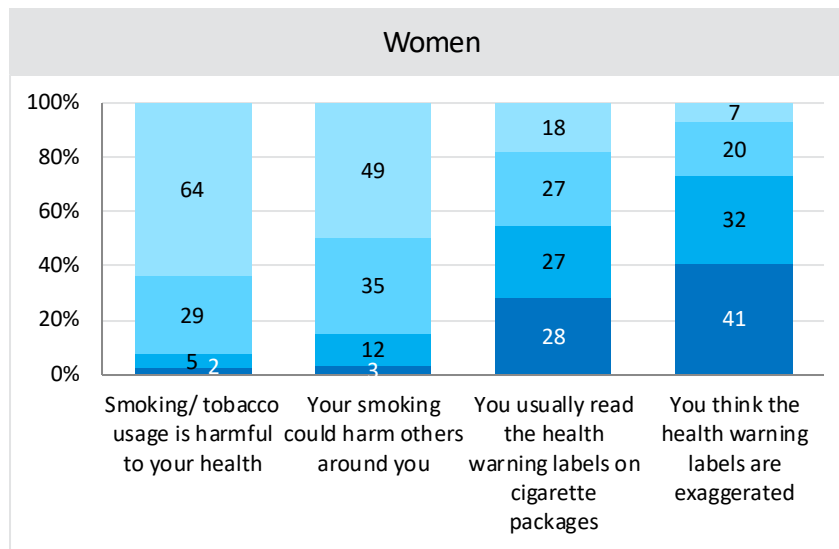
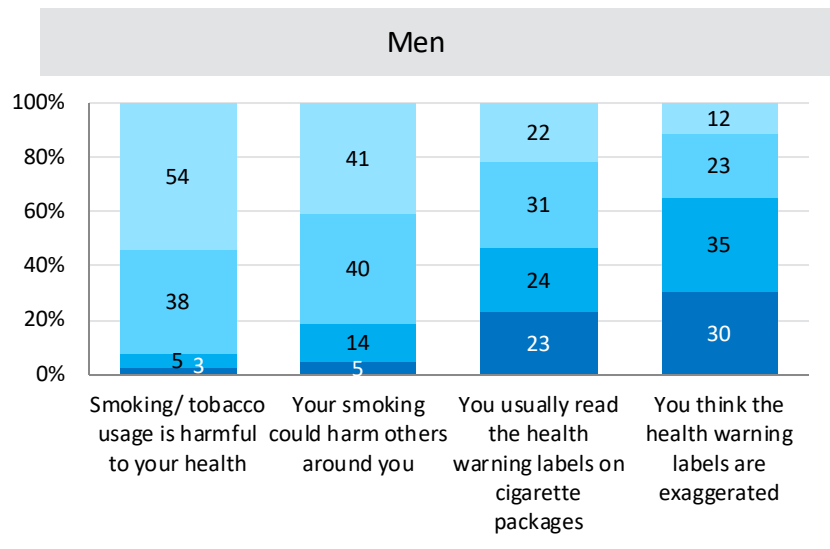


Beliefs and perceptions about smoking- Current users

Among both men and women, the majority of current users of tobacco products/other products believe smoking is harmful to their health.

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

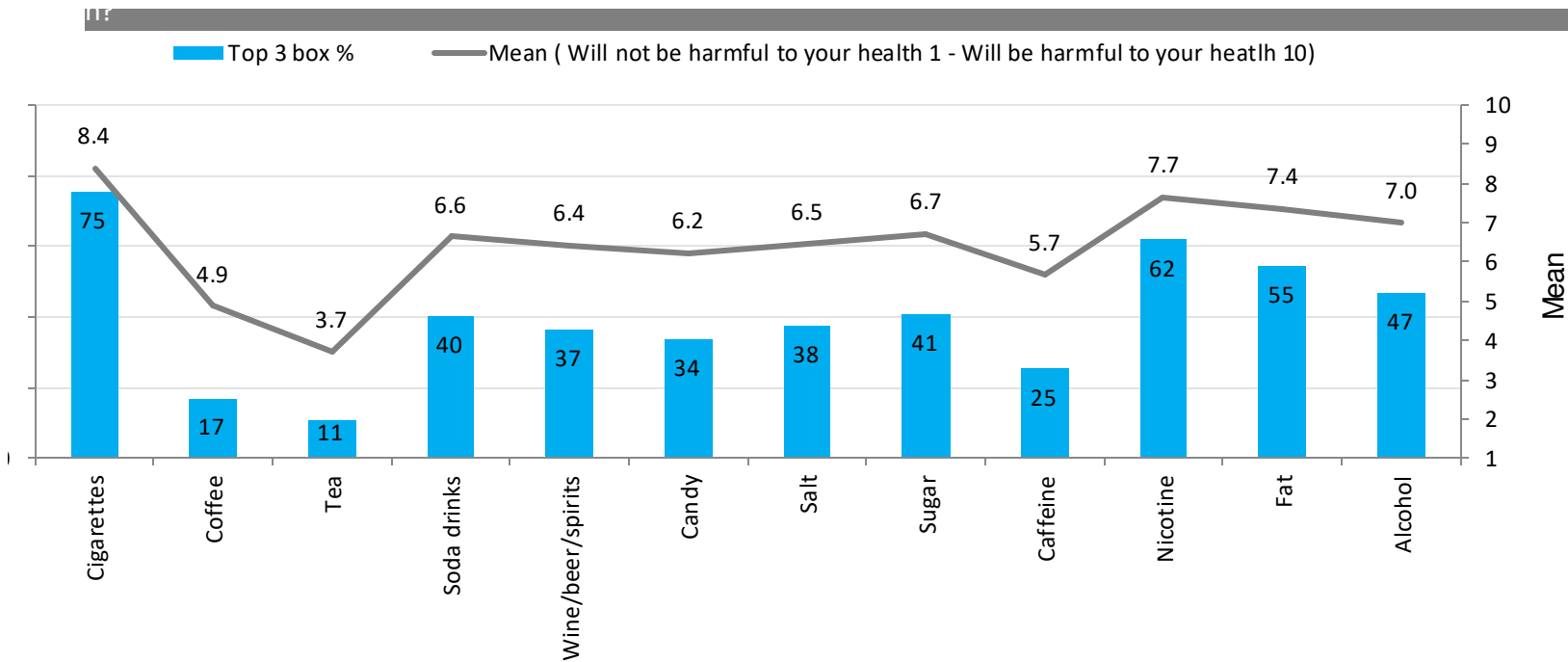


figures are in %

base : Random Sample, Current Users of tobacco products/ other products Men : n=1096 Women : n=927

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.

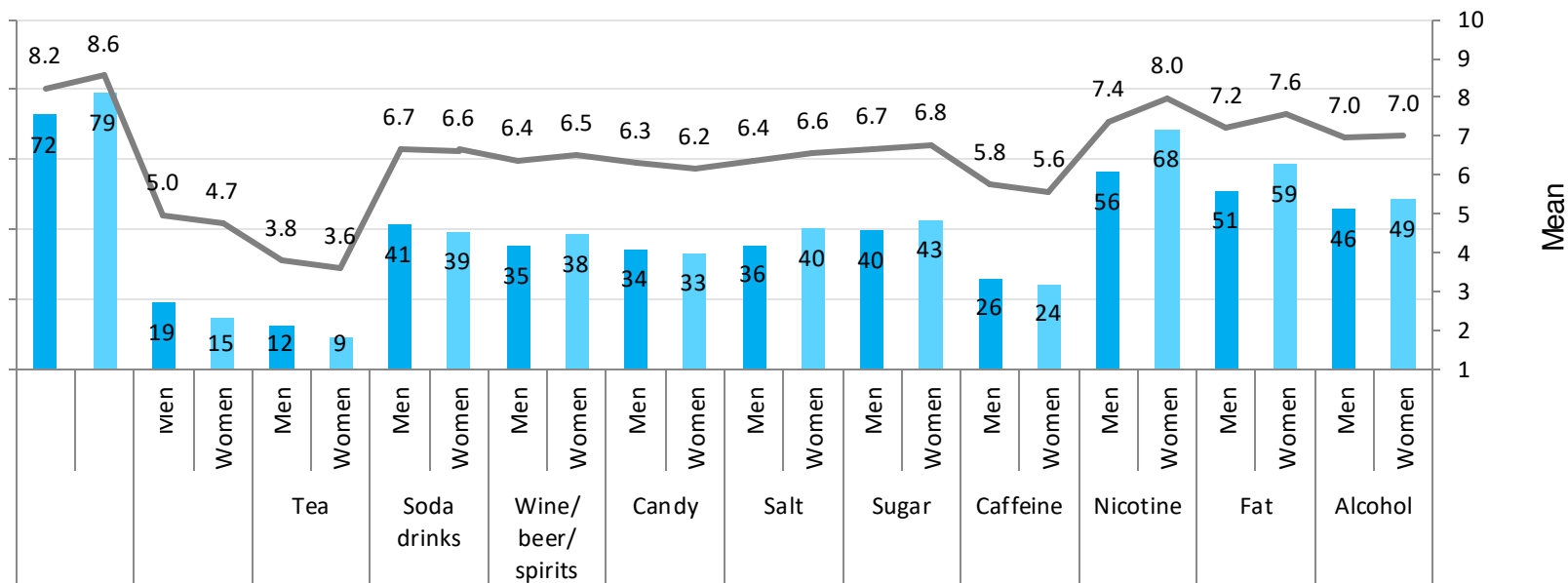


led 8, 9 or 10 on a 10 points scale (Will not be harmful to your health 1 - Will be harmful to your health 10)

nt Users of tobacco products/ other products : n=2030

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. More women believe Cigarettes & Nicotine are harmful, as compared to men.

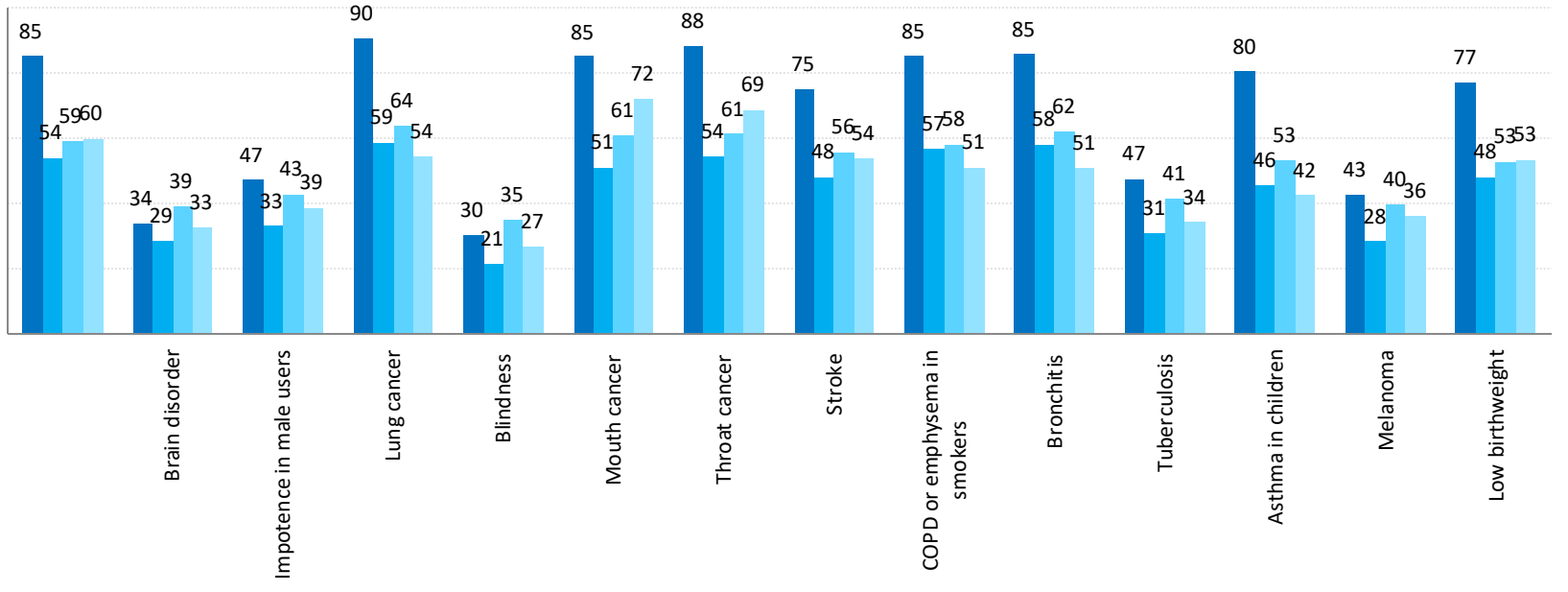


scale (Will not be harmful to your health 1 - Will be harmful to your health 10)

s/ other products Men : n=1096 Women : n=927

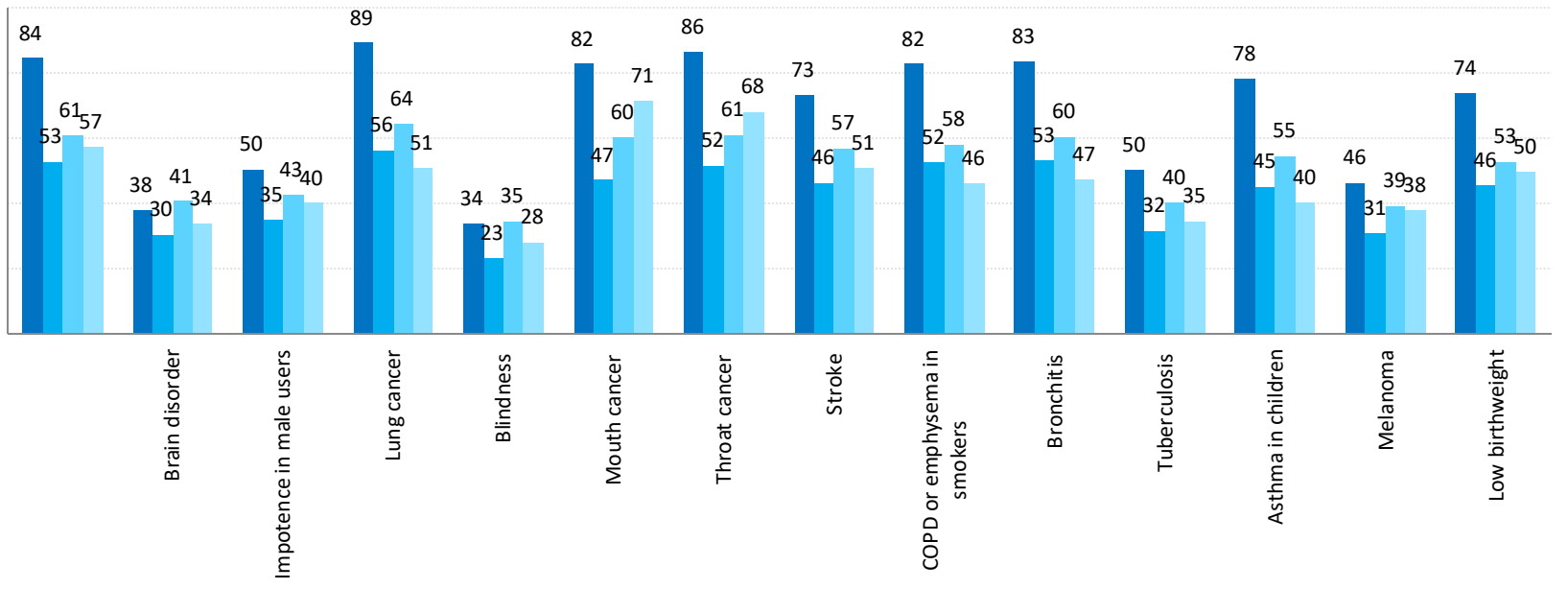
Risk perception comparison among various tobacco and other products

E-cigarettes have the lowest risk perception of causing diseases among current users/vapers/smokers (with the exception of lung cancer, COPD, and bronchitis where Smokeless Tobacco is directionally lower).



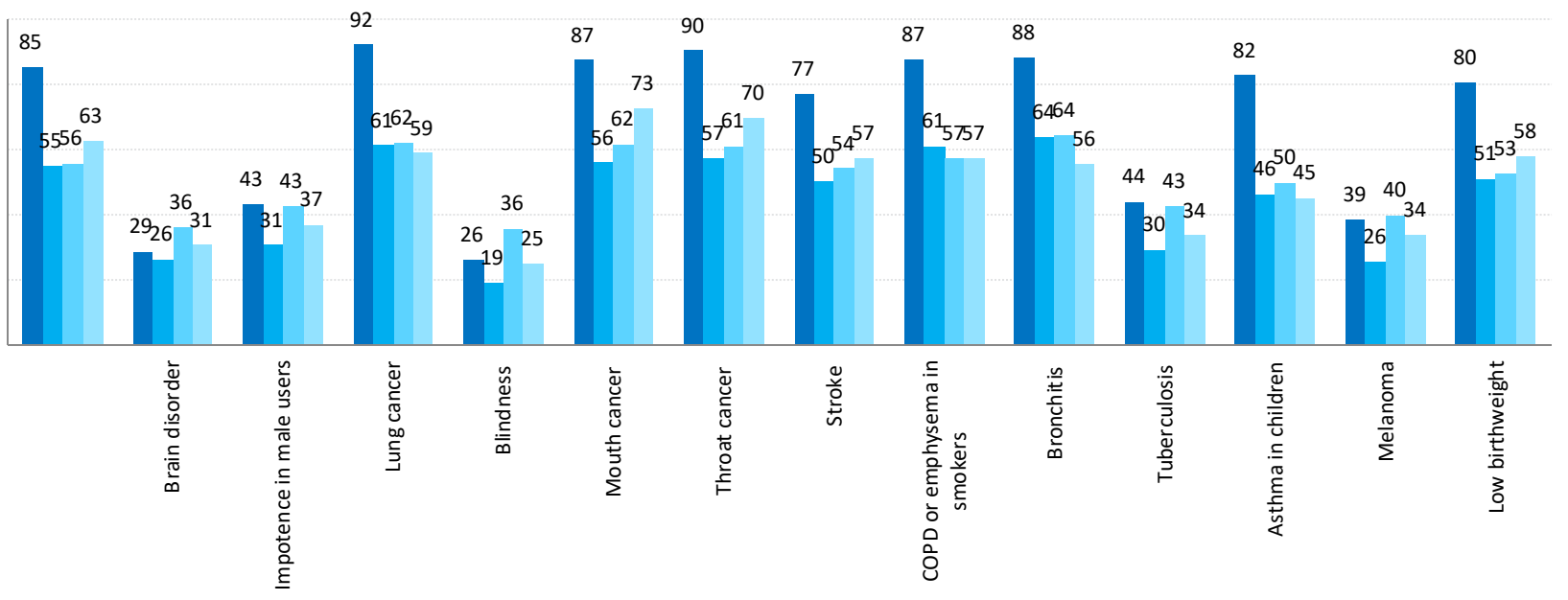
Risk perception comparison among various tobacco and other products

Among men smokers/vapers/ current users, E-Cigarettes have the lowest risk perception of causing diseases.



Risk perception comparison among various tobacco and other products

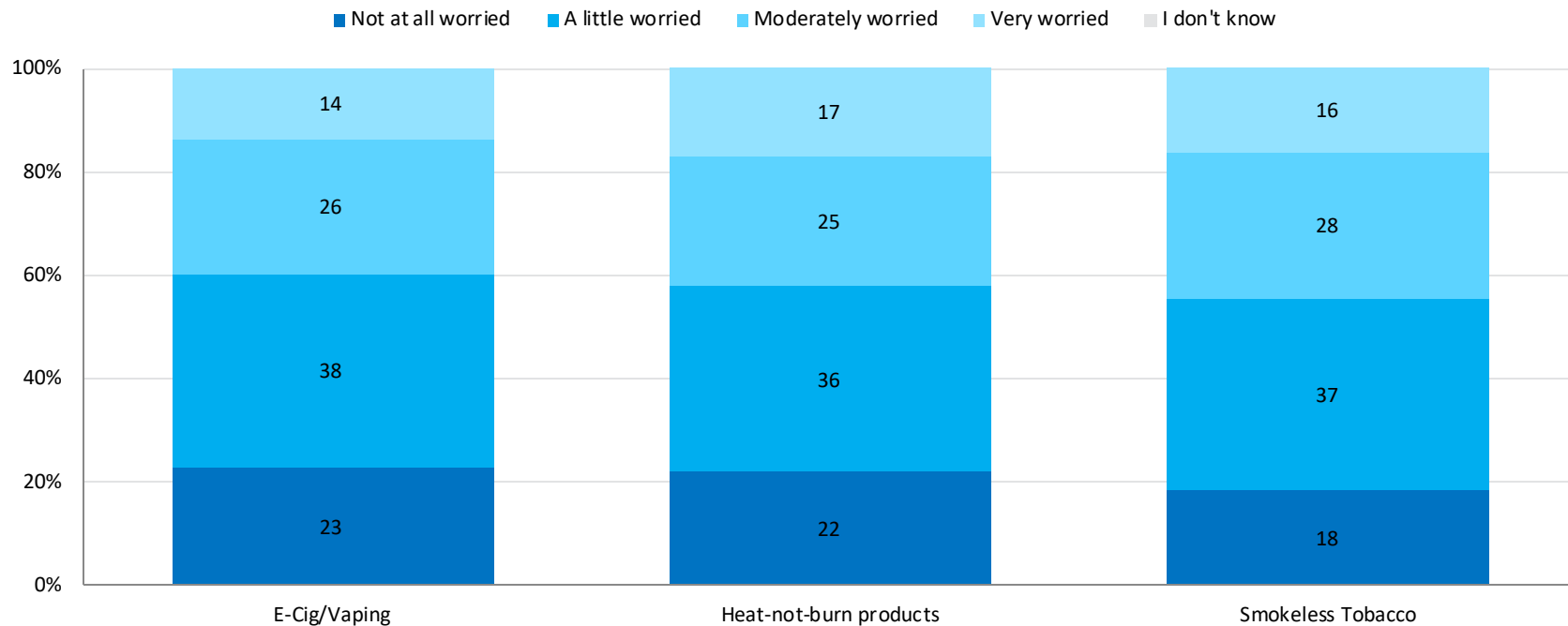
On average, women smokers/vapers/current users gave a higher risk perception ratings across the board, as compared to men – particularly for Smoking Tobacco.



Beliefs and perceptions comparison among E-Cig, HNB and Smokeless tobacco

Approximately 55%-60% of the vapers/smokers/users of E-Cig/Vaping, Heat-not-burn products & Smokeless Tobacco are not worried/a 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?



1%

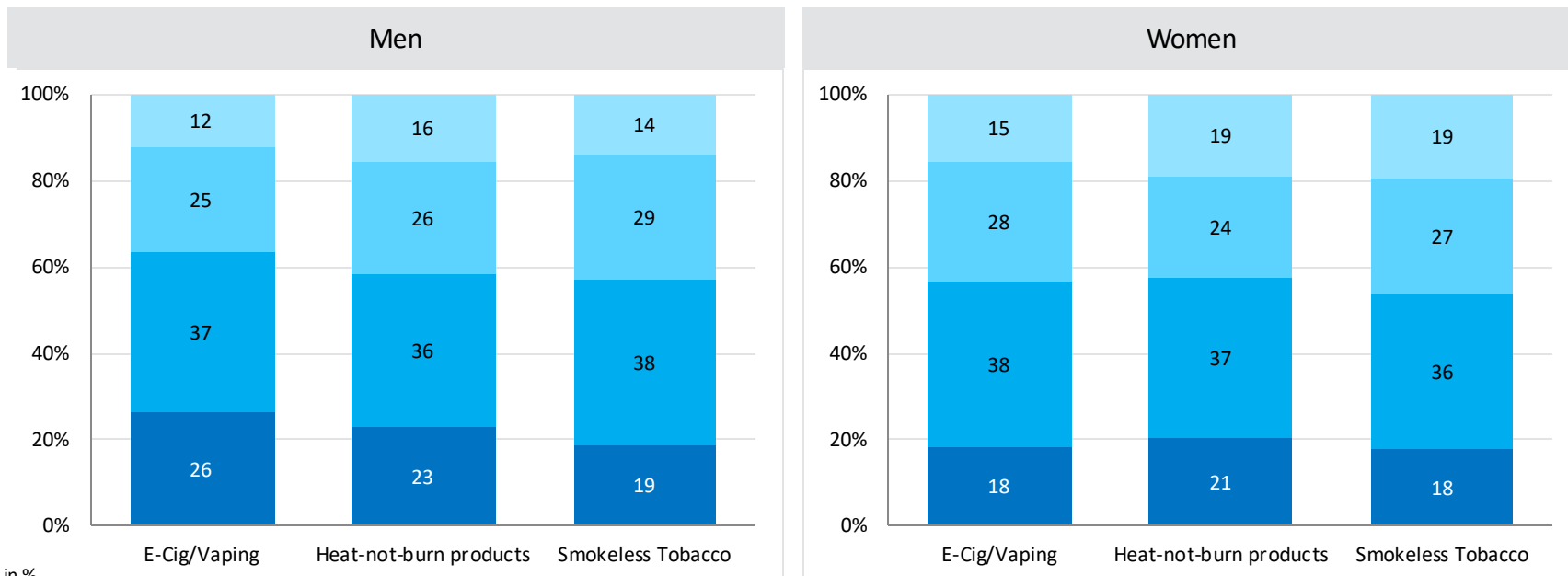
mSample, Those who are aware of the respective products : E-Cig n : 1998 Heat-not-burn products n : 507 Smokeless tobacco n : 1883

Beliefs and perceptions comparison among E-Cig, HNB and Smokeless tobacco

Among men, fewer users are worried about the damage E-Cig/Vaping 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?

■ Not at all worried ■ A little worried ■ Moderately worried ■ Very worried ■ I don't know



Figures are in %

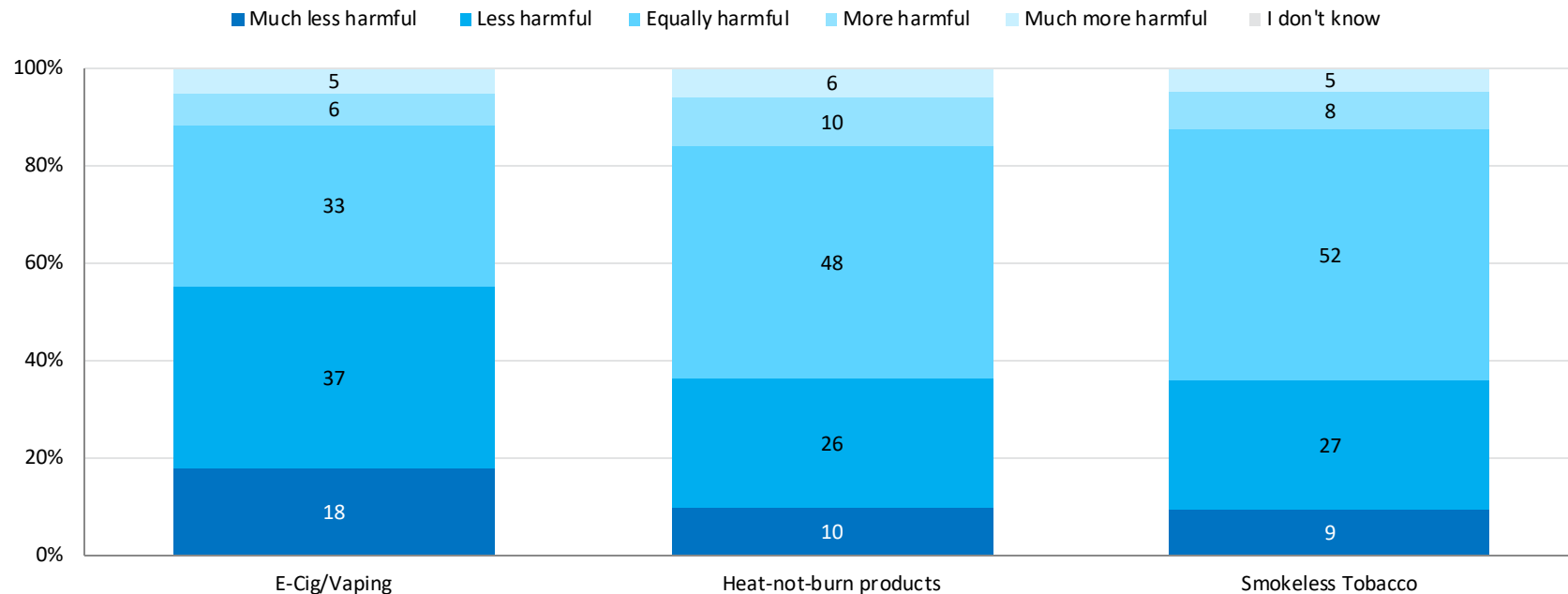
Base : Random Sample, Those who are aware of the respective products: E – Cig Men: n=1077 Women: n=915; Heat-not-burn products Men: n=315 Women: n=190;

Smokeless tobacco Men: n=1050 Women: n=826

Beliefs and perceptions- Current users/Vapers/Smokers

55% of current users/smokers/vapers consider E-Cigs/Vaping less/much less harmful than smoking tobacco. On the other hand, only 36% perceive Heat-not-burn products and Smokeless Tobacco as less harmful.

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

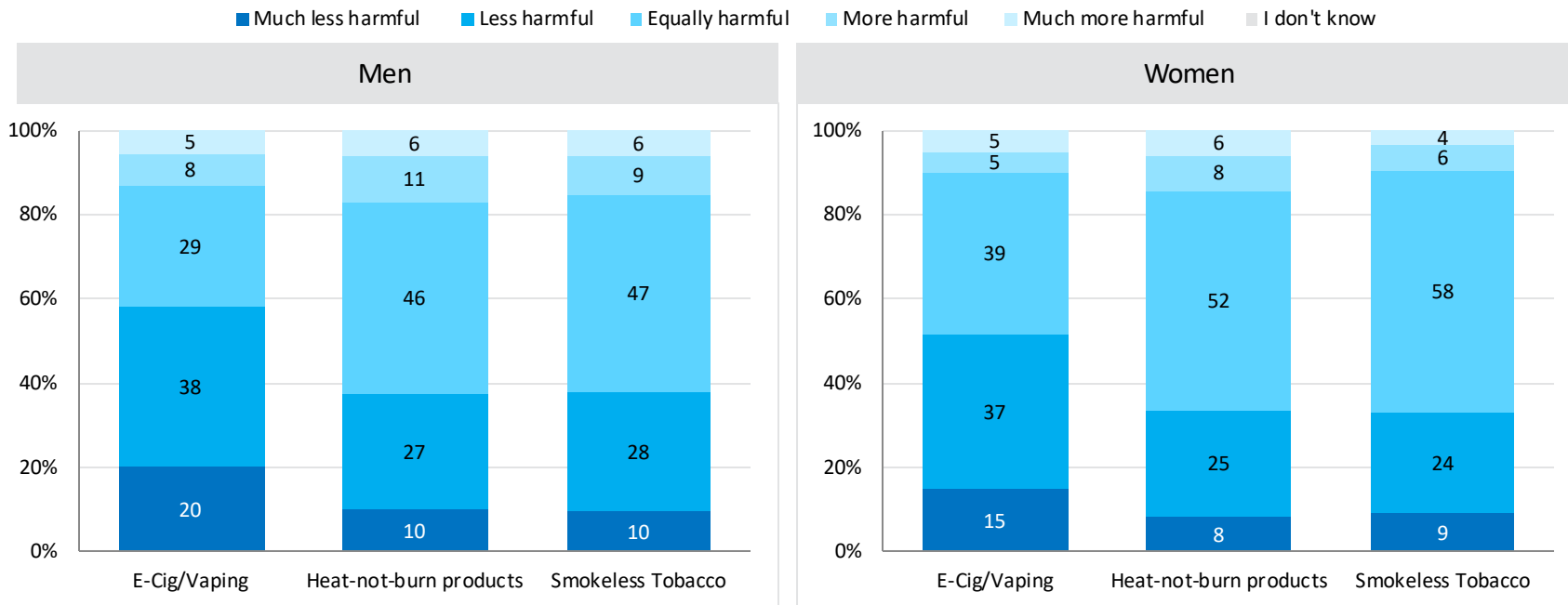


Sample, Those who are aware of the respective products: E-Cig n: 1998 Heat-not-burn products n: 507 Smokeless tobacco n: 1883

Beliefs and perceptions- Current users/Vapers/Smokers

Among both men and women, more than one-half users believe E-Cig is less harmful than smoking tobacco.

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

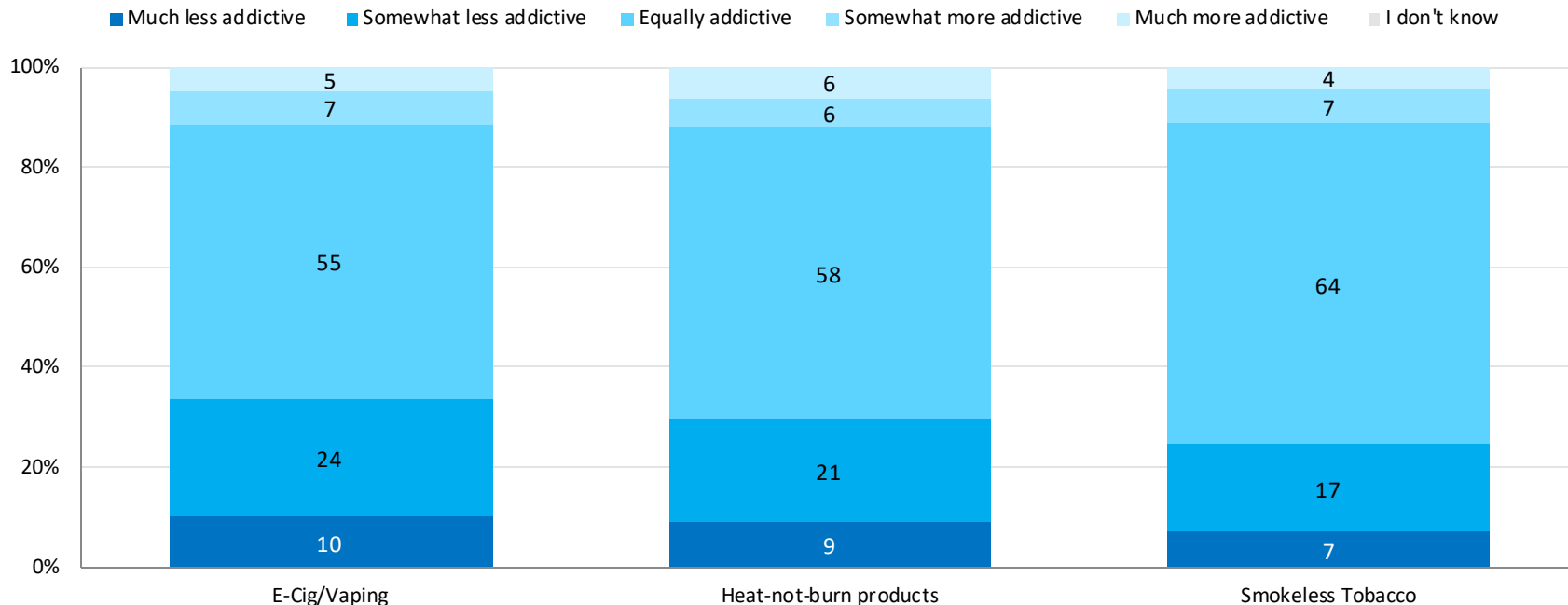


Figures are in %
 Base: Random Sample, Those who are aware of the respective products: E-Cig Men: n=1077 Women: n=915; Heat-not-burn products Men: n=315 Women: n=190; Smokeless tobacco Men: n=1050 Women: n=826

Beliefs and perceptions- Current users/Vapers/Smokers

Around 55%-65% 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 products are perceived as less addictive than smoking tobacco.

8/10.1/10.9. Compared to smoking tobacco, would you say using this product is...?

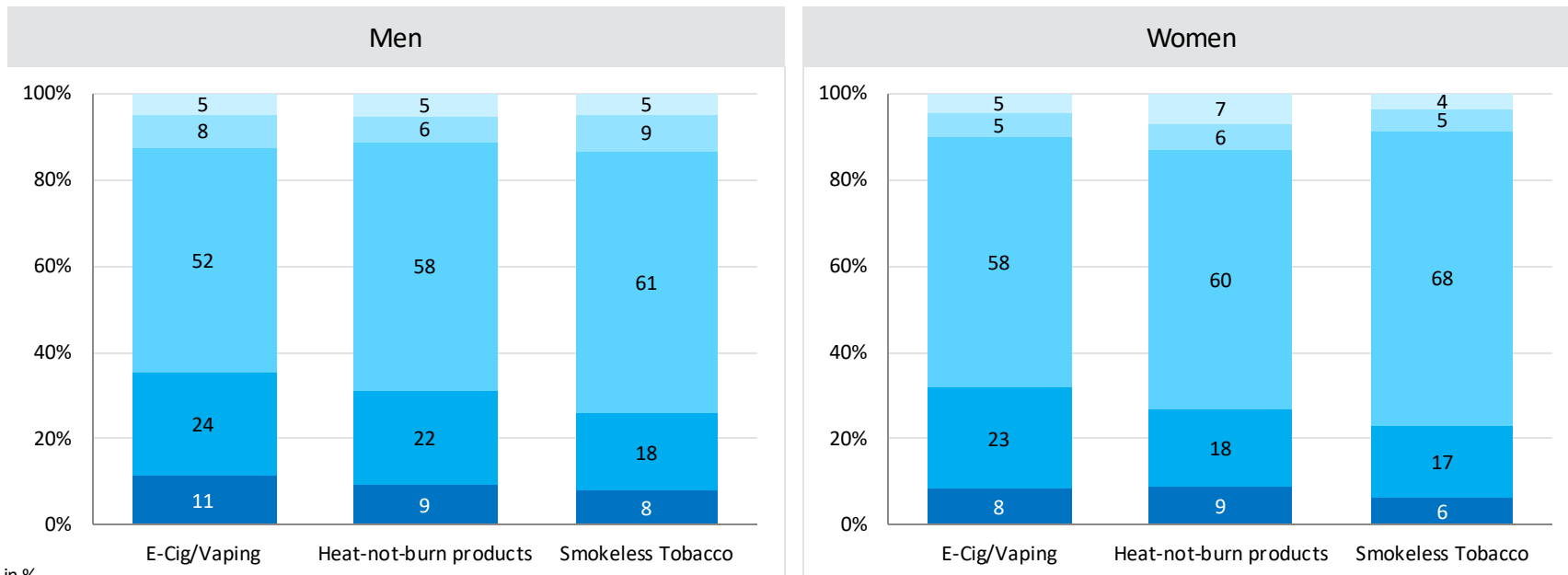


Beliefs and perceptions- Current users/Vapers/Smokers

Among both men and women, the majority of current users of tobacco products/ other products users believe E-Cig, Heat-not-burn products & Smokeless Tobacco are equally addictive as 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



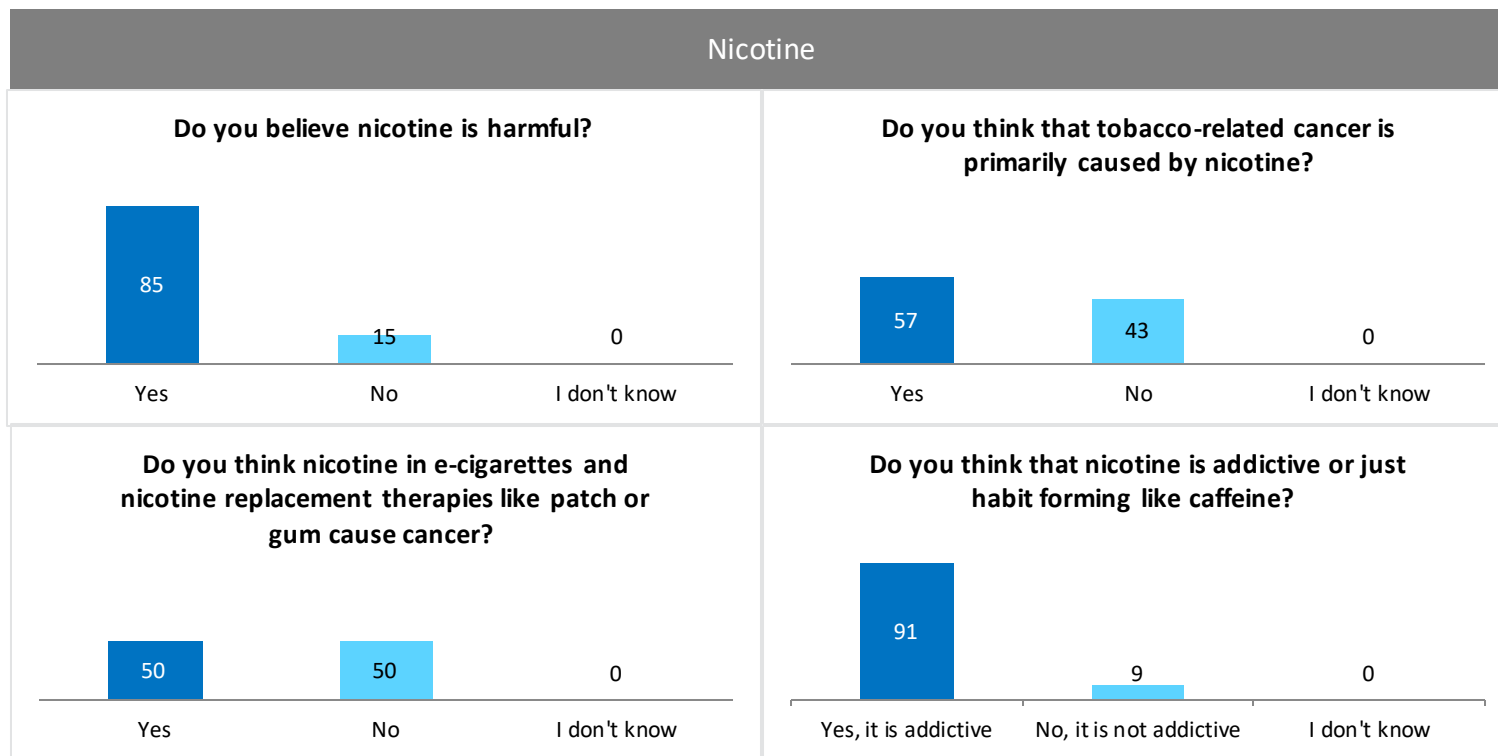
Figures are in %

Base: Random Sample, Those who are aware of the respective products: E - Cig Men: n=1077 Women: n=915; Heat-not-burn products Men: n=315 Women: n=190; Smokeless tobacco Men: n=1050 Women: n=826

Risk perception of Nicotine - Current users/Vapers/Smokers

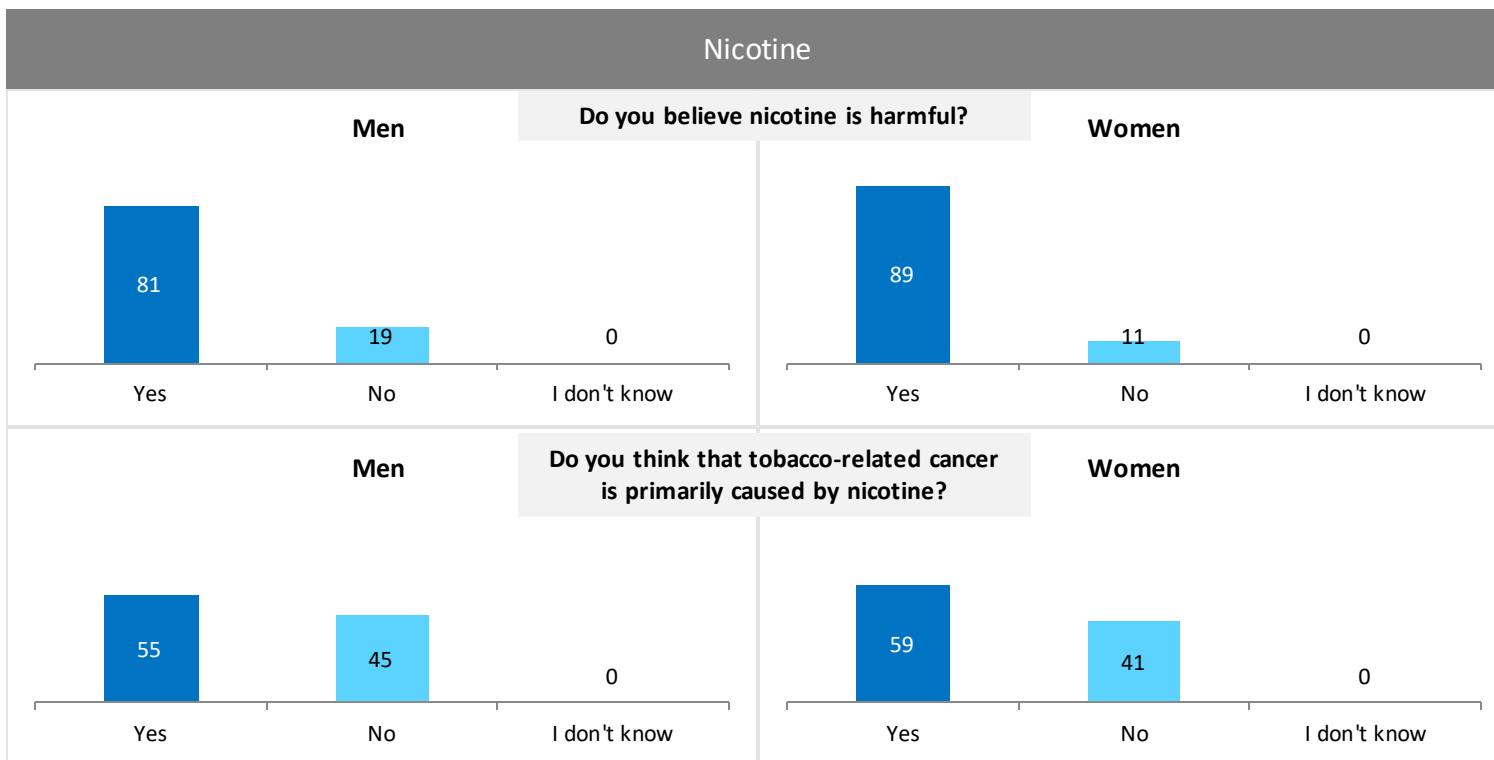
The majority of current users/vapers/smokers believe nicotine is both harmful and addictive.

Around 57% of the current users/vapers/smokers think tobacco-related cancer is primarily caused by Nicotine, whereas, one-half of the current users/vapers/smokers believe E-Cig/nicotine replacement therapies like patch or gum cause cancer.



Risk perception of Nicotine - Current users/Vapers/Smokers

Among both men and women, the majority of the current users/vapers/smokers believe nicotine is harmful.

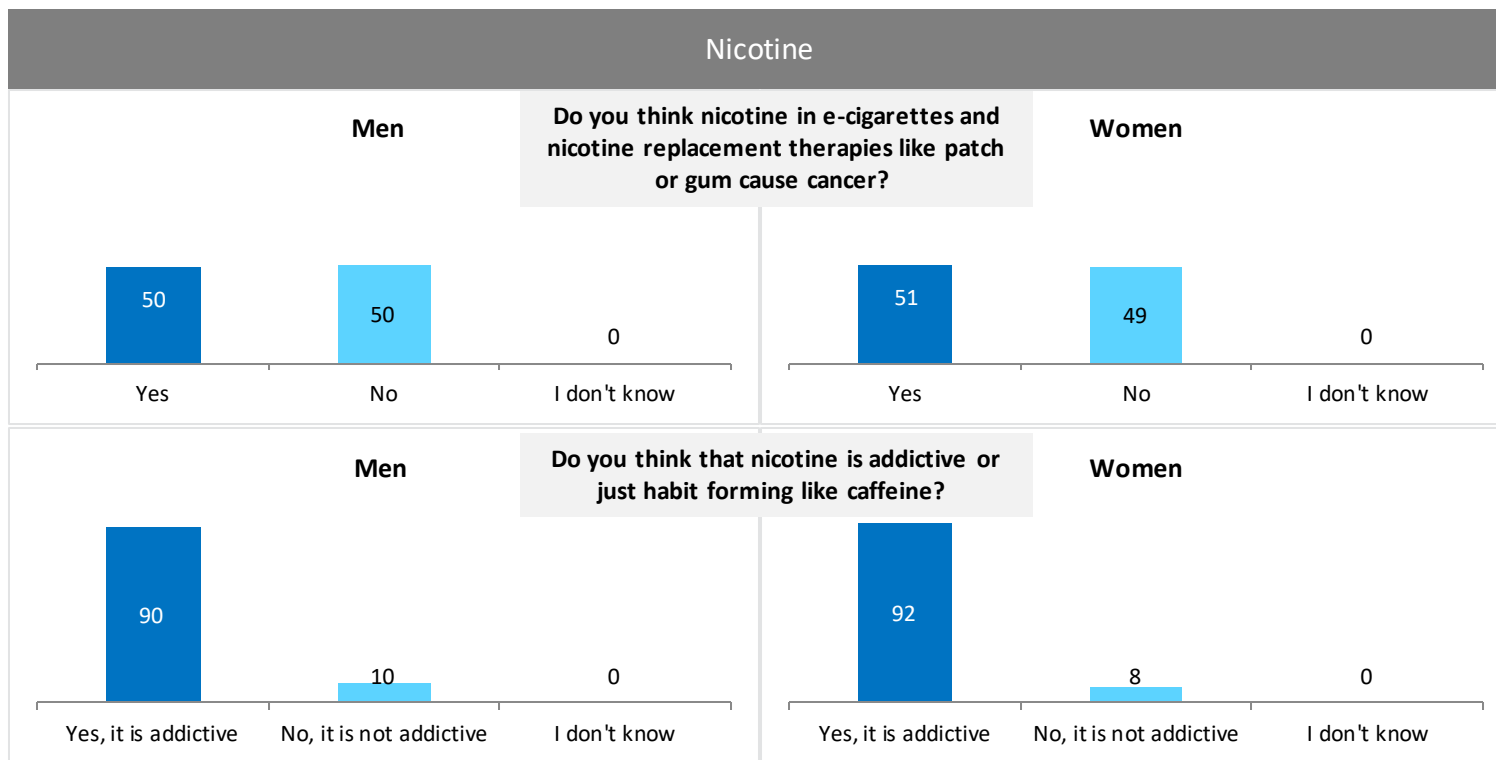


s are in %

Random Sample, Current Users of tobacco products/other products Men : n=1096 Women : n=927

Risk perception of Nicotine - Current users/Vapers/Smokers

Among both men and women, the vast majority of the people believe nicotine is addictive; however, one-half of the current users of tobacco/other products opined that E-Cig/ nicotine replacement therapies like patch or gum causes cancer.

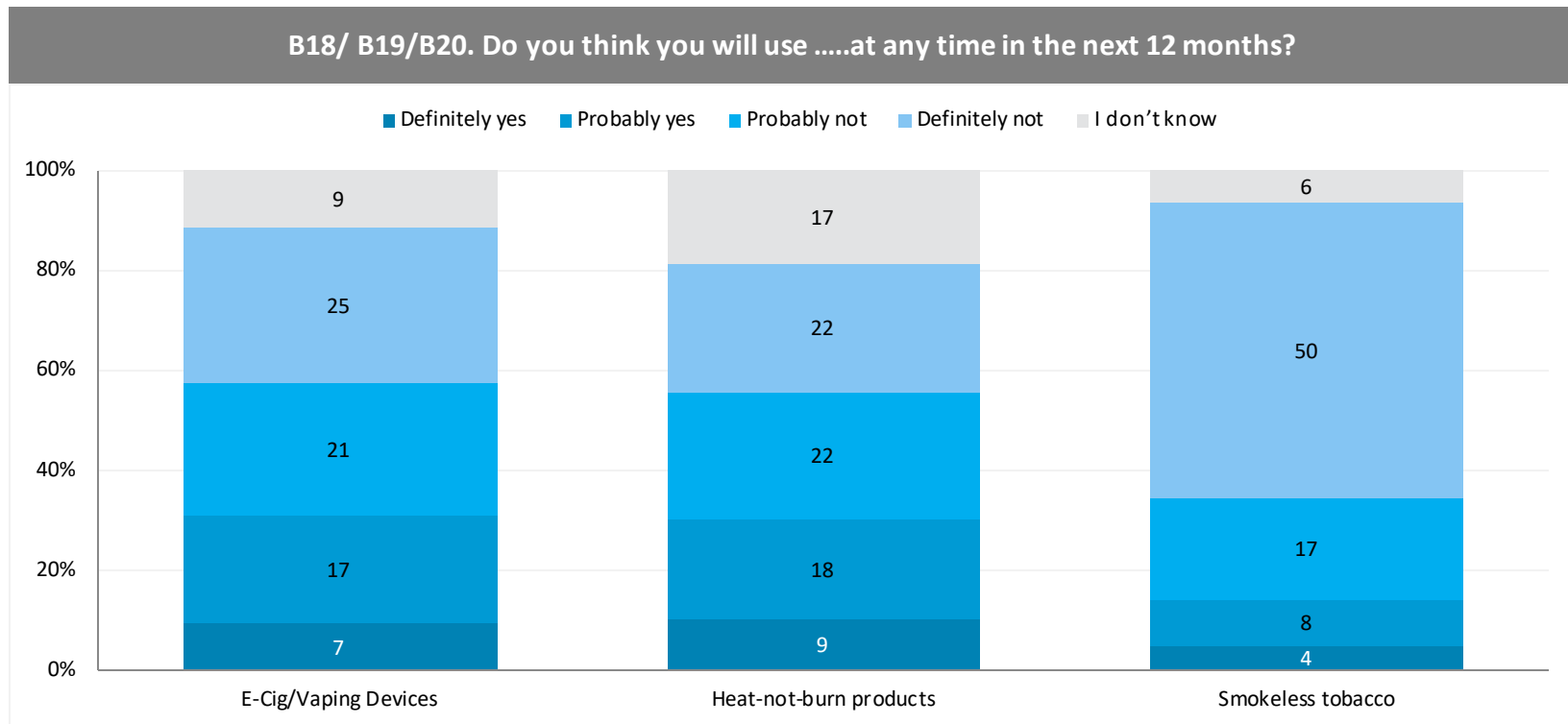


s are in %

Random Sample, Current Users of tobacco products/ other products Men : n=1096 Women : n=927

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

Among the current users/smokers/vapers who are not currently using Smokeless Tobacco; 67% of them are not willing to use Smokeless Tobacco in the next 12 months.

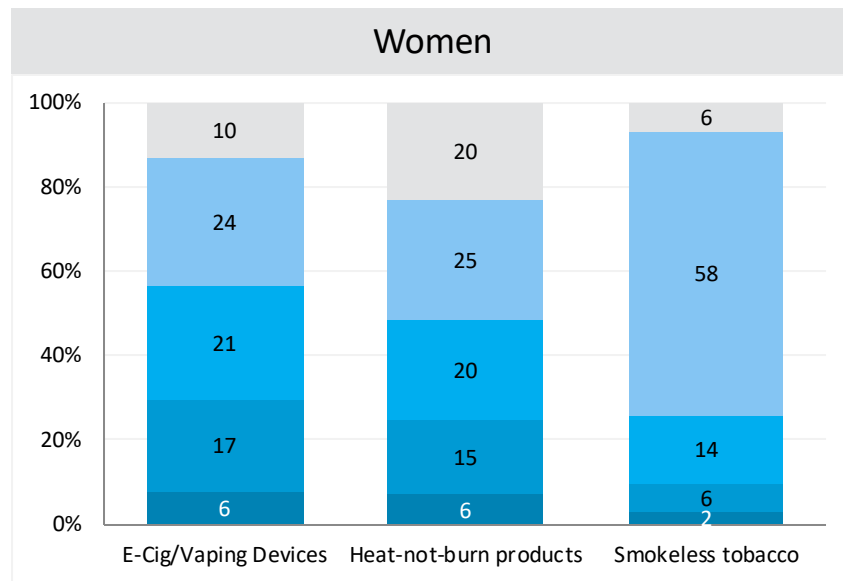
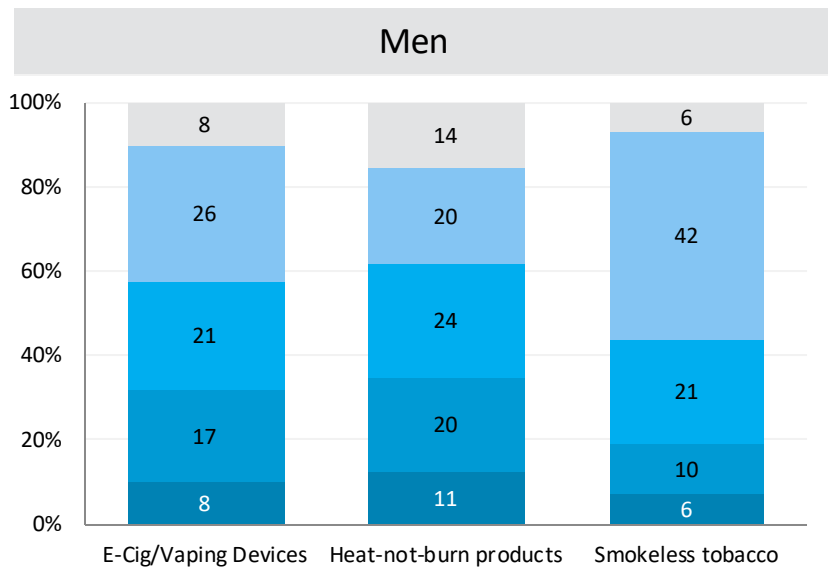


Intention to purchase : E-Cig, Heat-not-burn, Smokeless tobacco

Among men, the willingness to use Heat-not-burn products is comparatively higher.

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=673 Women: n=707, non users of Heat-not-burn products Men: n=1177

Women: n=1057, non users of smokeless tobacco Men: n=888 Women n=1009

4.3 Quitting and Quitters

Profile Comparison

The demographic profile of quitters does not vary greatly from the current users.

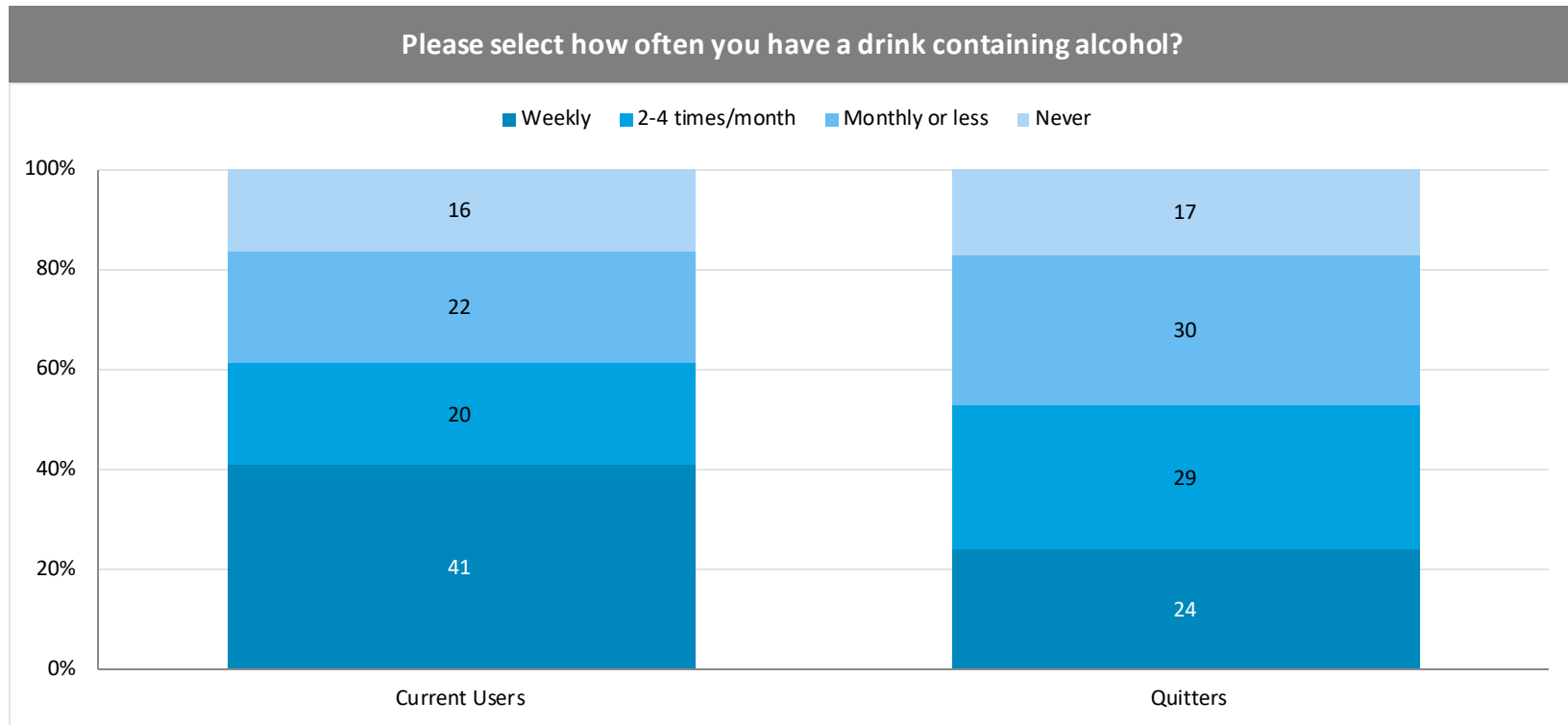
Profile of current users and quitters		
	Current Users/ Vapers/ Smokers	Quitters (who quit tobacco in last 5 years)
Base	2030	281
Men	54	47
Women	46	53
18-24 yrs	11	16
25-35yrs	32	29
36-50yrs	32	28
51- 69 yrs	26	27
Rural	17	15
Small Town	31	30
Large Town	15	16

Figures are in %

Base : Random Sample, Current Users of tobacco products : n=2030, Quitters n=281

Comparison between Among Current Users/ Vapers/ Smokers & Quitters

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



Among Quitters: Data is for past consumption prior to quitting

Percentage in %

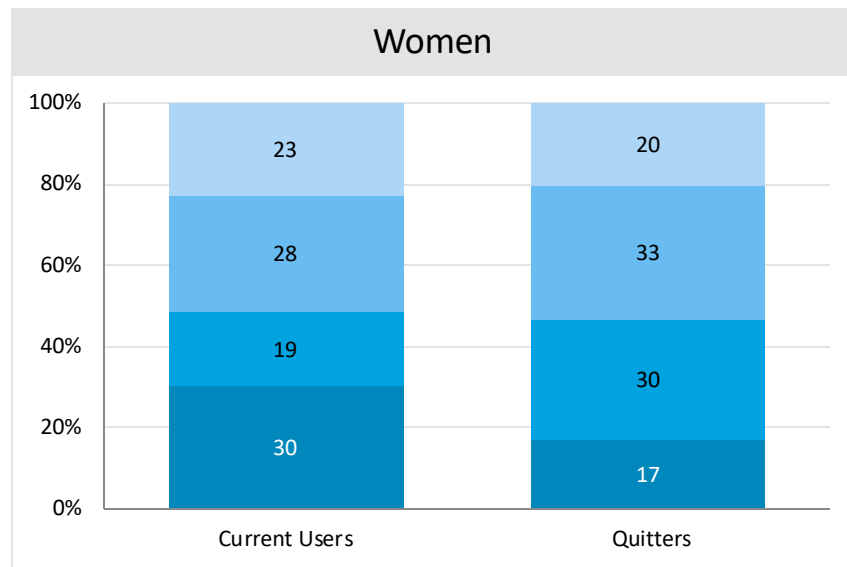
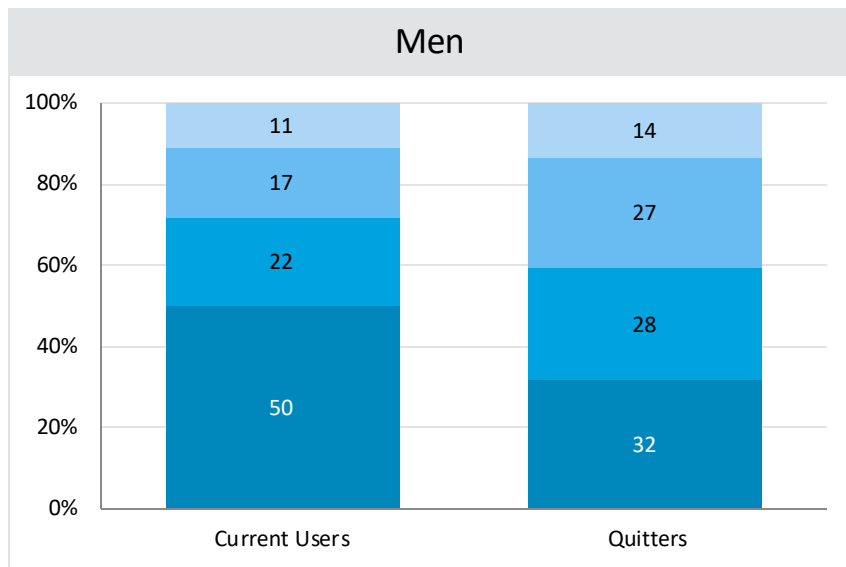
Random Sample, Current Users of tobacco products : n=2030, Quitters n=281

Comparison between Among Current Users/ Vapers/ Smokers & Quitters

Among both men and women, alcohol consumption frequency (weekly) is higher among current users/vapers/smokers. In addition, among both 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=1096 Women : n=927, Quitters Men : n=133 Women : n=148

Usage Comparison

Among quitters, usage of Nicotine gum and Nicotine patches is more than among current users/vapers/smokers, whereas, among current users, E-Cig with nicotine is higher than quitters.

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	2030	281
Cigarettes	68	70
Rolled Cigarettes	14	10
Electronic cigarettes/vaping devices with nicotine	37	27
Capsule/Flavored cigarettes	5	3
Tube d Cigarettes	18	11
Electronic cigarettes/vaping devices without nicotine	17	18
Nicotine gum	6	12
Nicotine patch	5	10

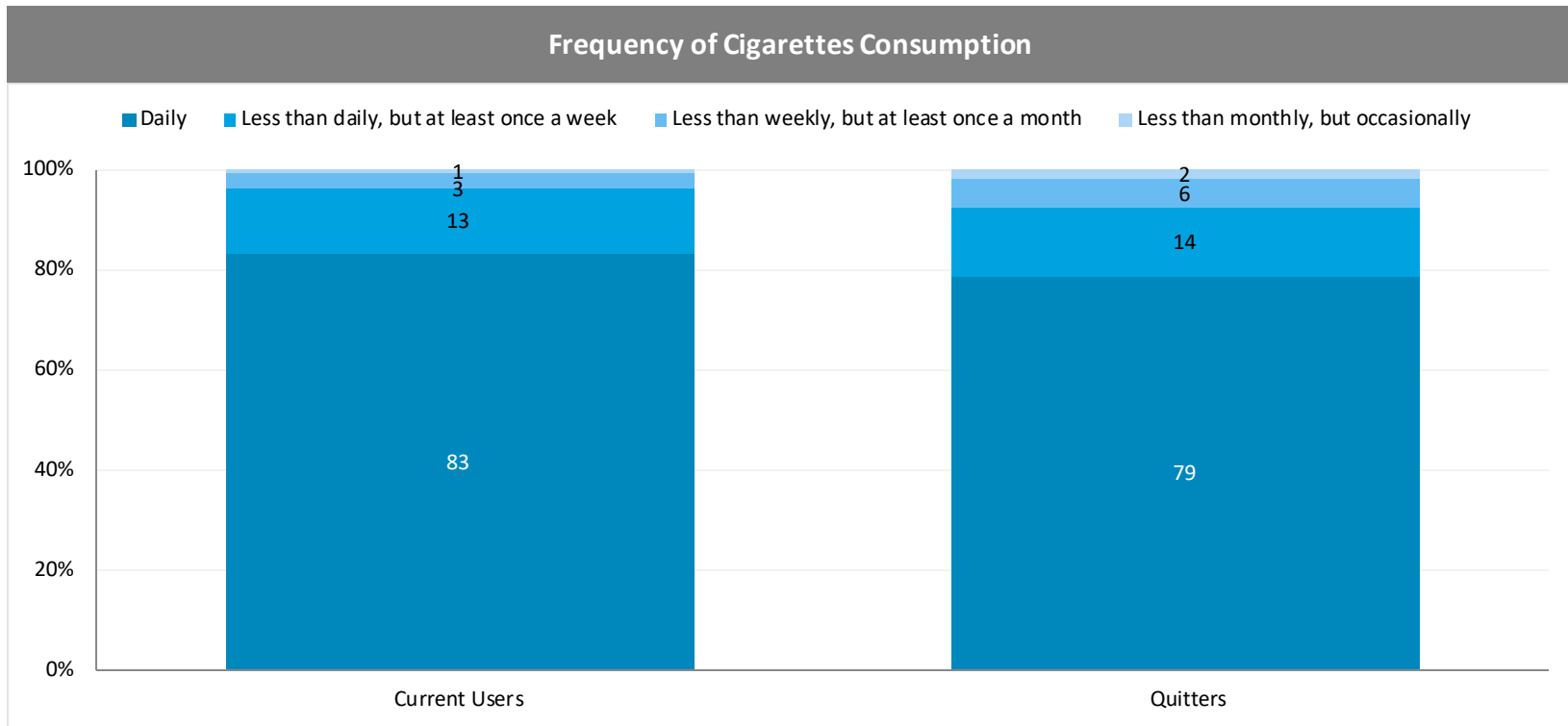
Note: Among Quitters: Data is for past consumption prior to quitting

Figures are in %

Base : Random Sample, Current Users of tobacco products : n=2030, Quitters n=281

Frequency of Usage Comparison

Daily usage of Cigarettes is similar among both current users and quitters.



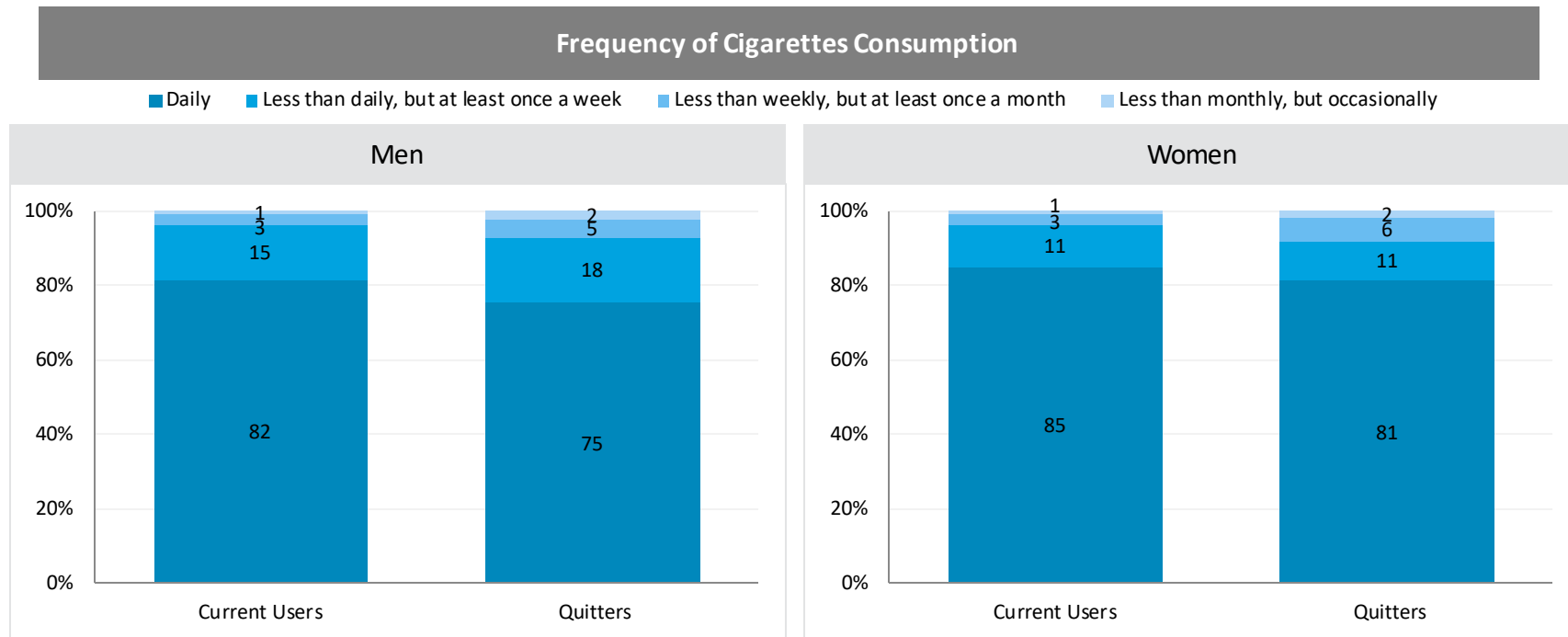
Quitters: Data is for past consumption prior to quitting

Percentage in %

Random Sample, Current Users of Cigarettes : n= 1375, Quitters n=197

Frequency of Usage Comparison

Among both men and women, daily usage of Cigarettes is similar among both current users and quitters.



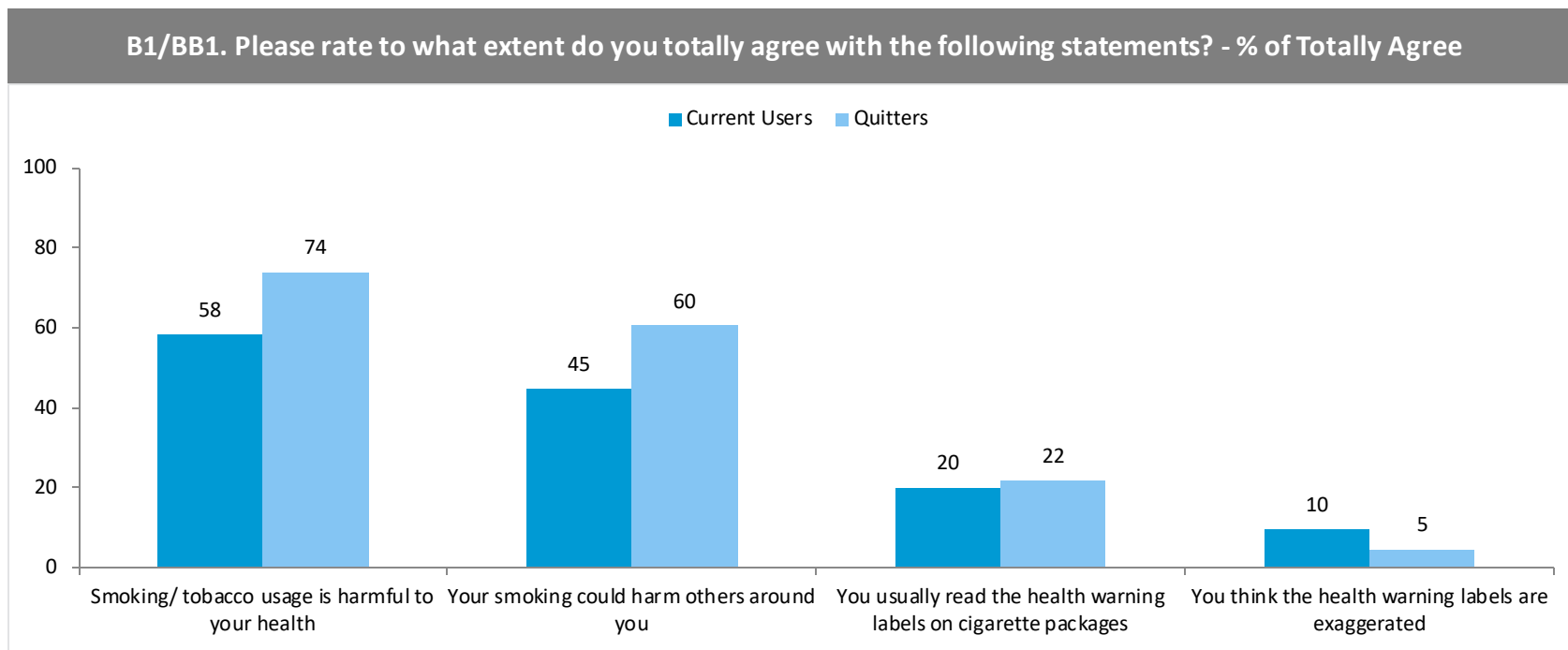
Note: Among Quitters: Data is for past consumption prior to quitting

Figures are in %

Base : Random Sample, Current Users of Cigarettes Men : n = 689 Women : n = 683, Quitters Men : n = 85 Women : n = 112

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

Quitters consider smoking tobacco more harmful (to both themselves and others) compared to current users.



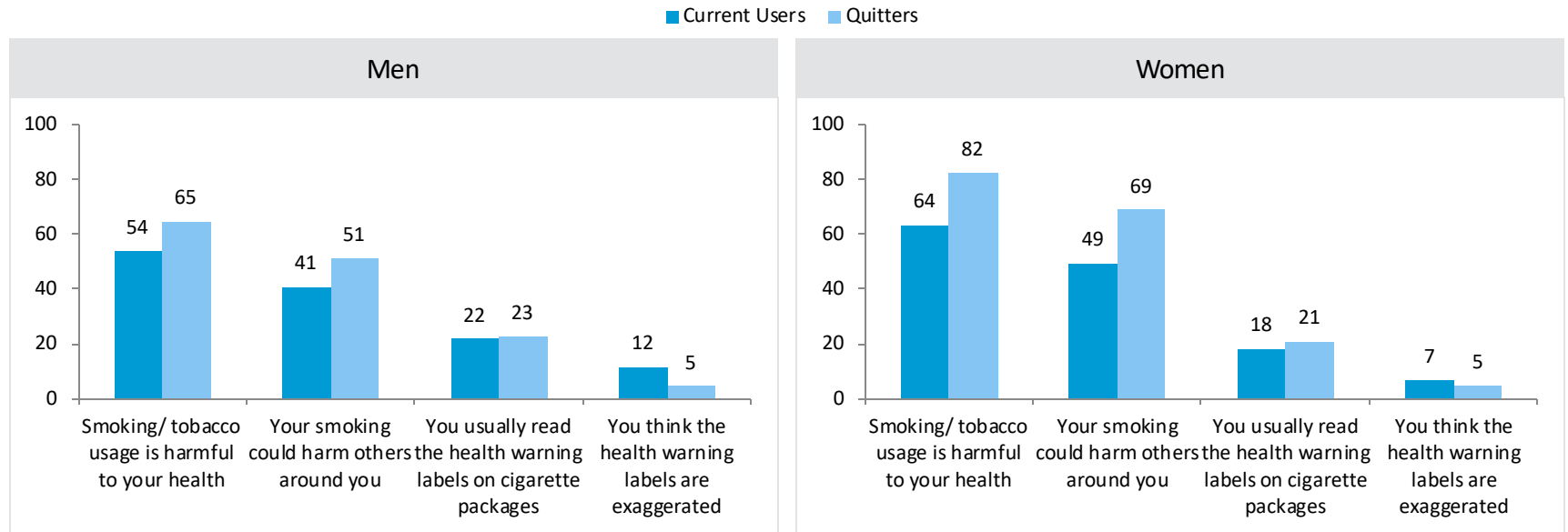
Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products : n=2030 Quitters : n=281

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

Among both men and women, smoking tobacco is considered more harmful for the smoker among quitters compared to current users.

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

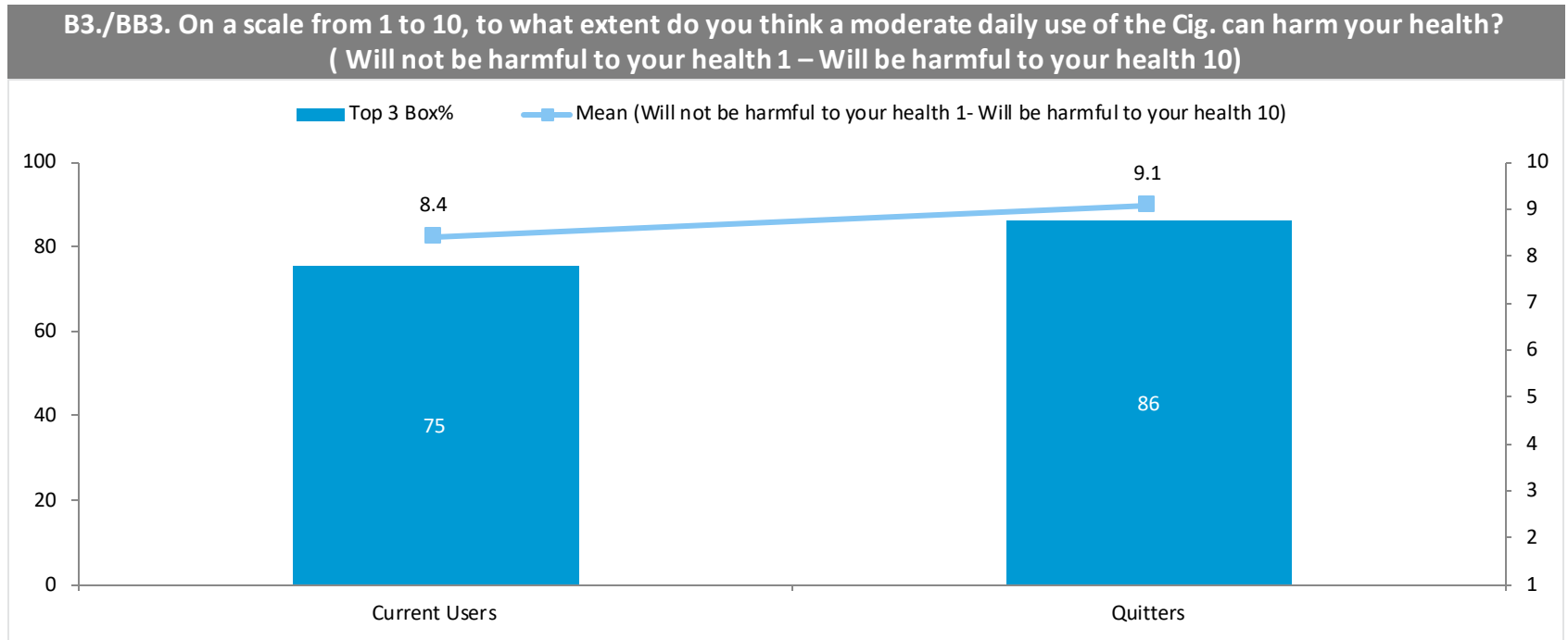


Figures are in %

Base : Random Sample, Current Users of tobacco products/other products Men : n=1096 Women : n=927, Quitters Men : n=133 Women : n=148

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

Risk perception is higher among quitters as compared to current smokers/users/vapers.



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)

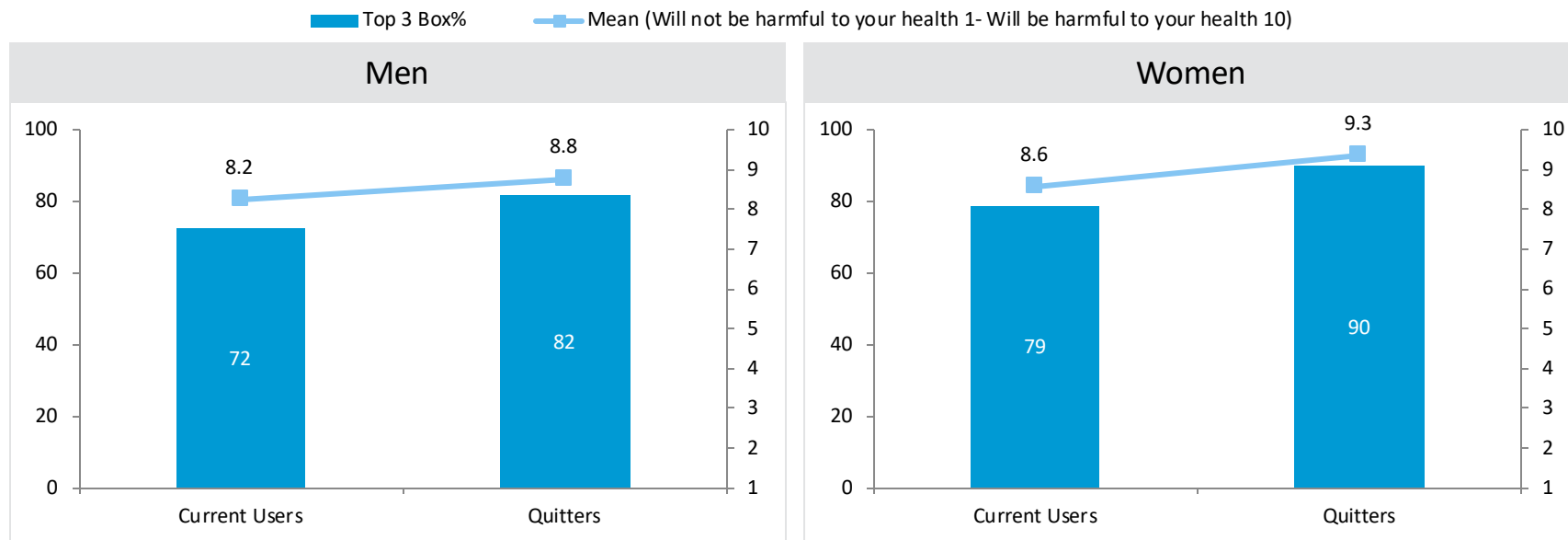
Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products : n=2030 Quitters : n=281

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

Women (both current smokers/users/vapers, as well as quitters) have a higher risk perception, as compared to men.

**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)**



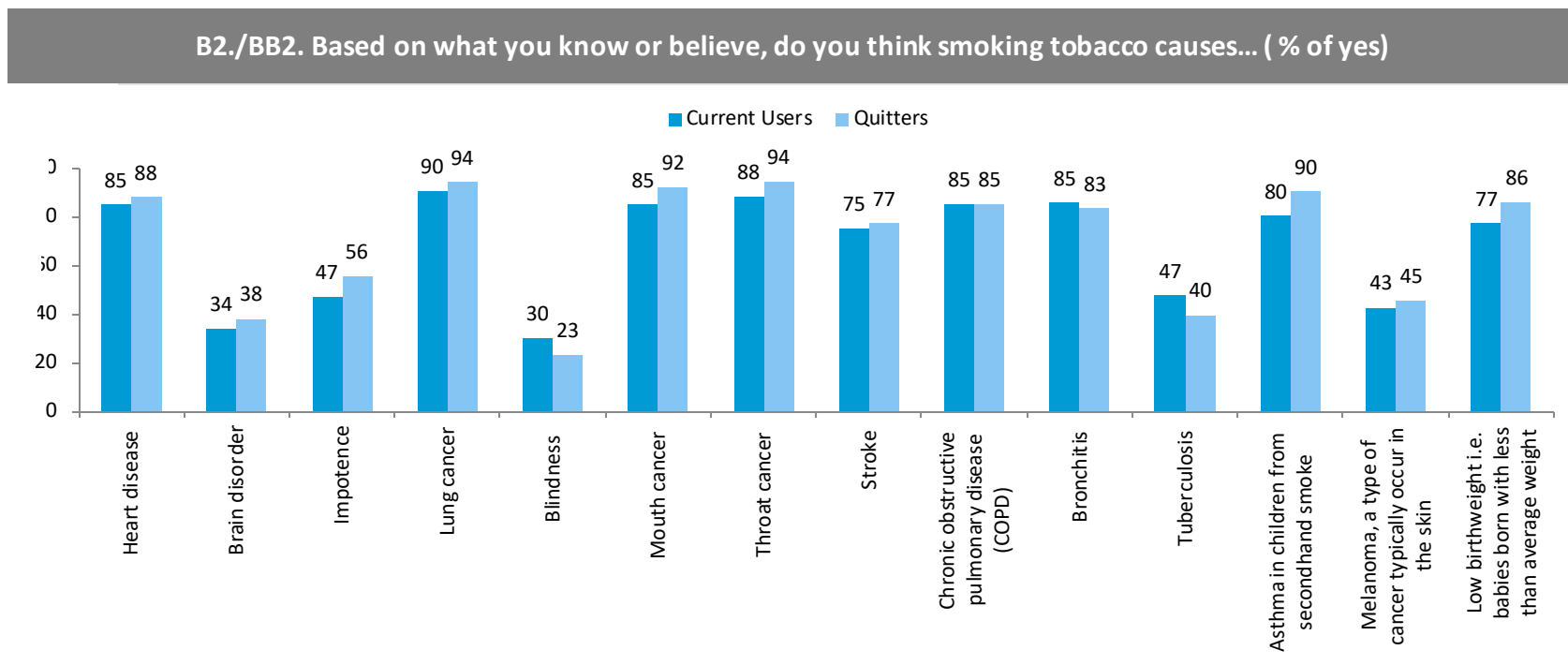
Top 3 Box: Those who coded 8, 9 or 10 (will be harmful to your health)

Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products Men : n=1096 Women : n=927, Quitters Men : n = 133 Women : n=148

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

More quitters believe smoking tobacco causes asthma and low birthweight.

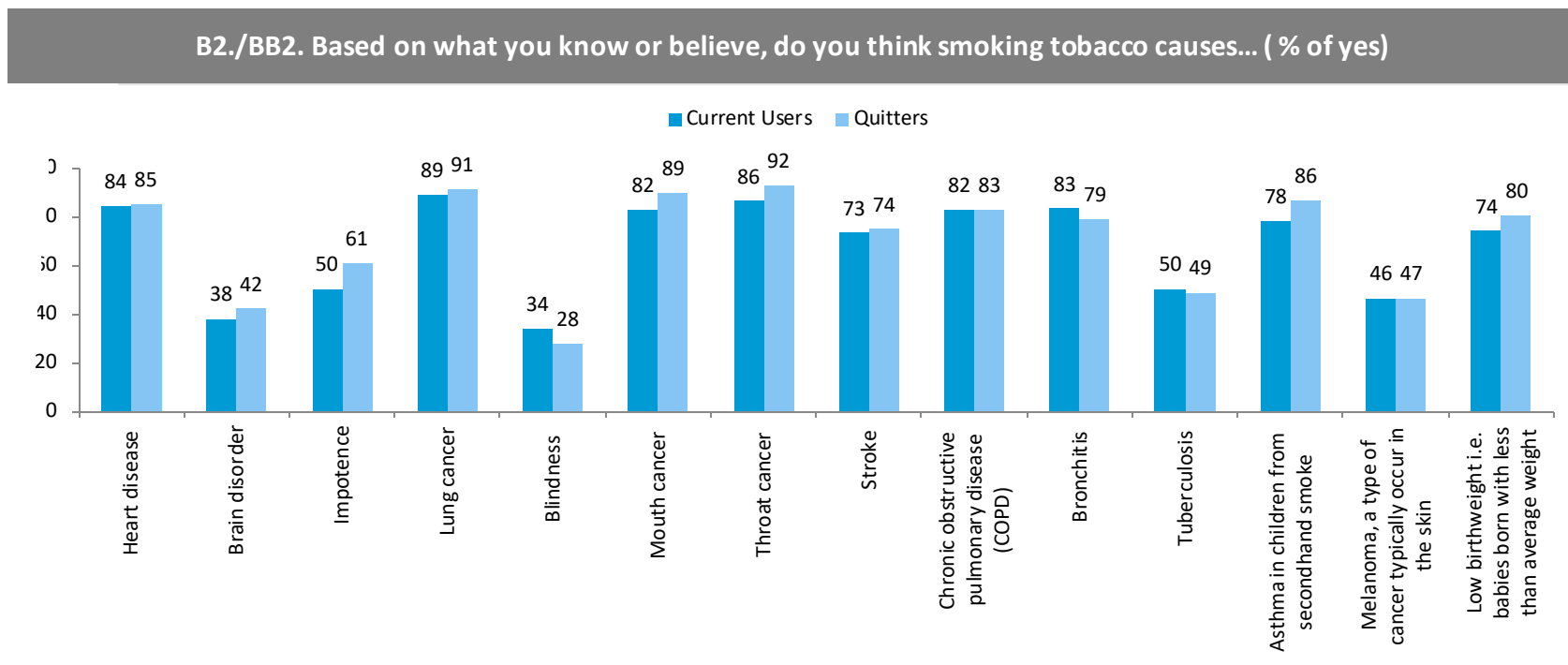


Figures are in %

Base : Random Sample, Current Users of tobacco products/ other products : n=2030 Quitters : n=281

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

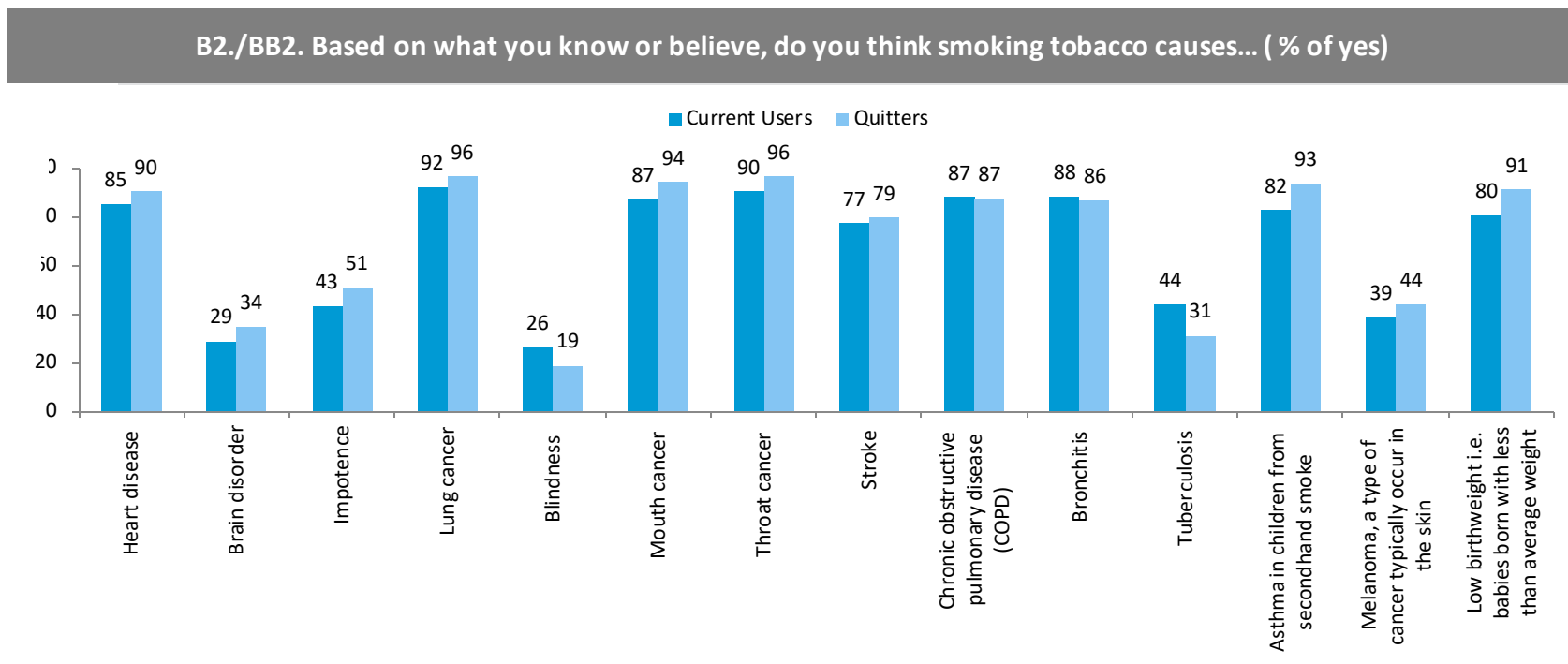
Among men, more quitters believe smoking tobacco causes asthma and low birthweight.



Figures are in %

Base : Random Sample, Current Users of tobacco products/other products Men : n=1096, Quitters Men : n = 133

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



Figures are in %

Base : Random Sample, Current Users of tobacco products/other products Women : n=927, Quitters Women : n=148

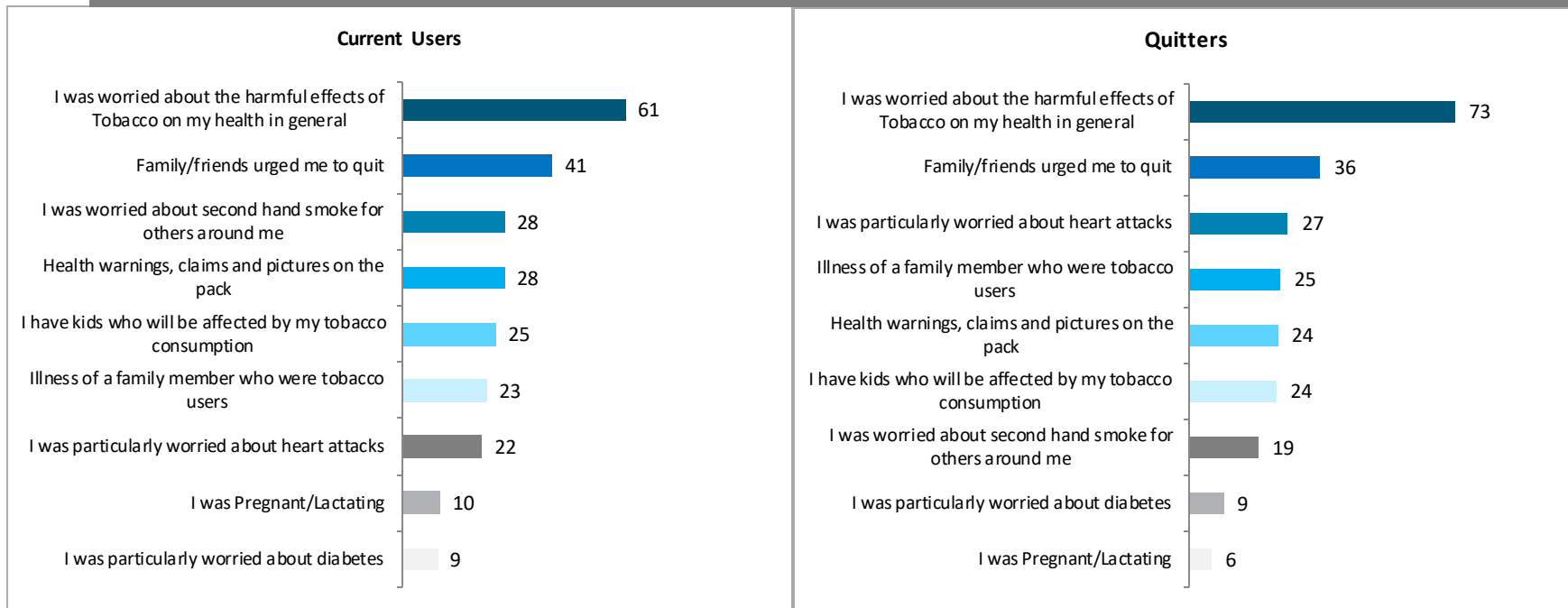
Quit – Past attempt and current plan among Current users/Vapers/Smokers

74% of the current smokers/users/vapors claim they have attempted to quit tobacco/other products, with only 27% claim they're planning to quit.

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	51-69 yrs	Rural area or village	Small or middle sized town	Large town
		%	%	%	%	%	%	%	%	%
n	2030	1096	927	216	644	643	527	354	625	309
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	74	73	76	67	70	76	79	78	73	73
No	26	27	24	33	30	24	21	22	27	27
n	527	301	222	71	190	154	112	78	168	82
B16. Are you planning to quit smoking/ using tobacco products?										
Yes	27	29	25	37	29	26	20	17	26	32
No	47	50	42	44	48	45	50	54	43	45
I don't know	26	20	33	20	23	29	30	29	30	23
I prefer not to answer	0	0	0	0	0	0	0	0	0	0

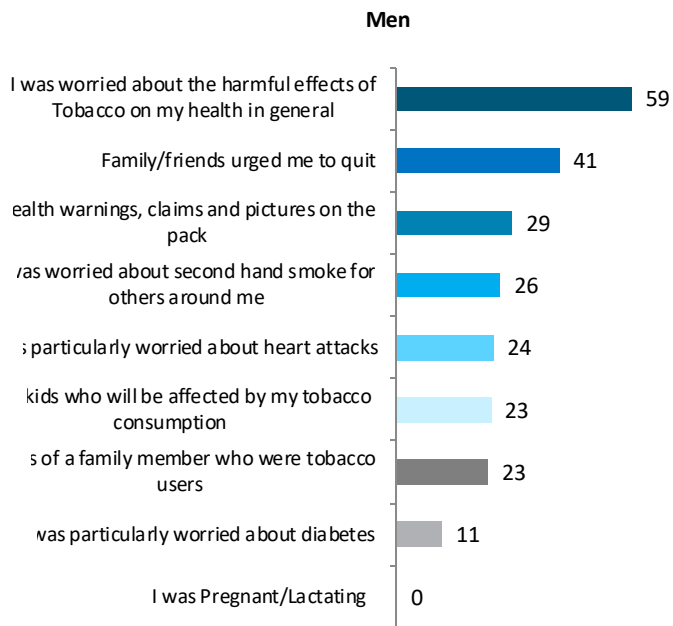
14.5/ BB 14.5 What were the reasons behind your decision to attempt to quit smoking quitting Tobacco consumption?



Reasons For Quitting - Among Current Users/Smokers/Vapers

Among both men and women, worry about the harmful effects of tobacco on health and family/friends urging them are the main reasons for attempting to quit.

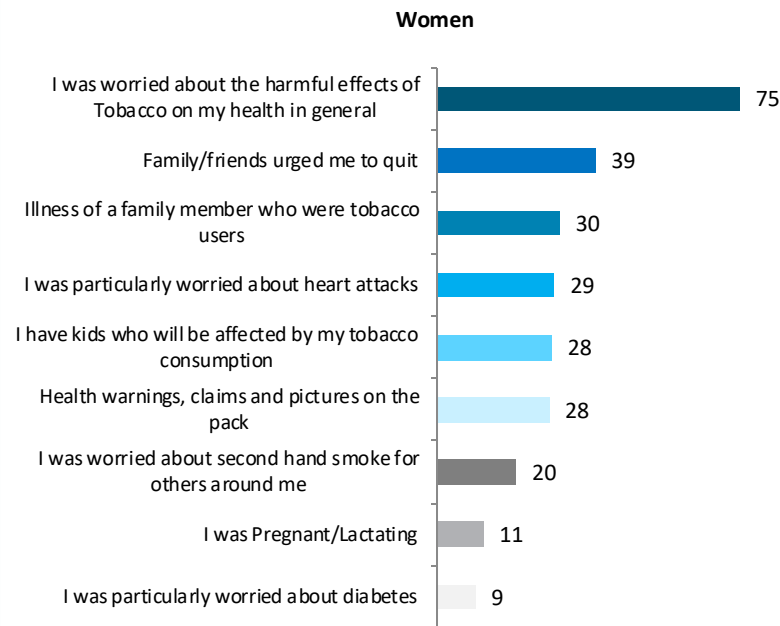
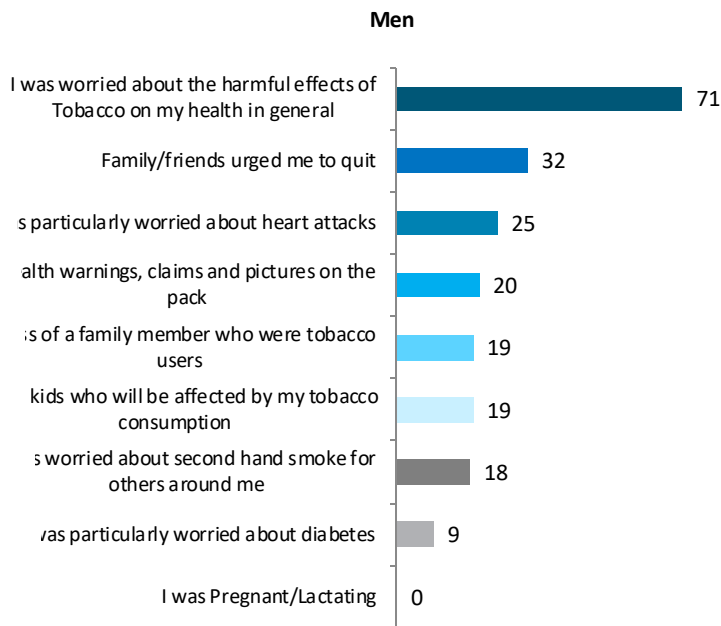
B14.5. What were the reasons behind your decision to attempt to quit smoking/quitting Tobacco consumption?



Reasons For Quitting - Among Quitters

Worry about the harmful effects of tobacco on health and family/friends urging them are the main reasons for quitting.

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

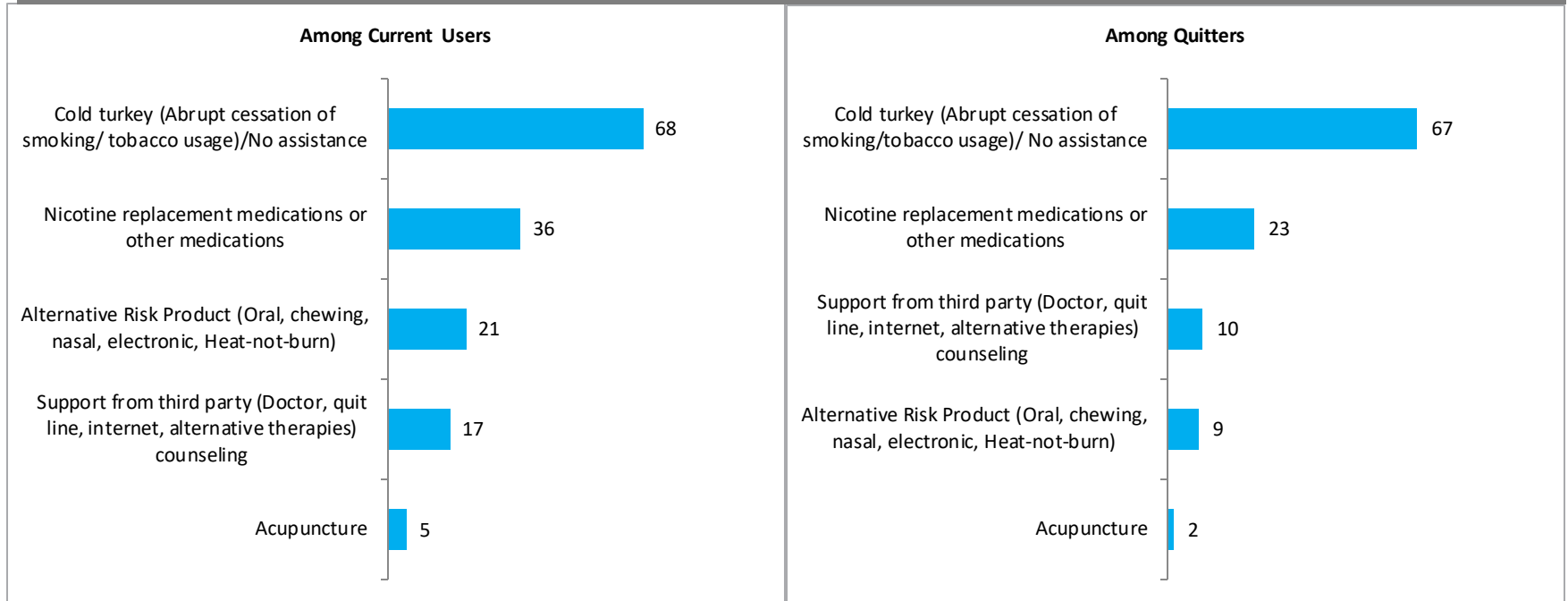


Figures are in %

Base : Random Sample, Current Users who attempted to Quitters Men : n=133 Women : n=148

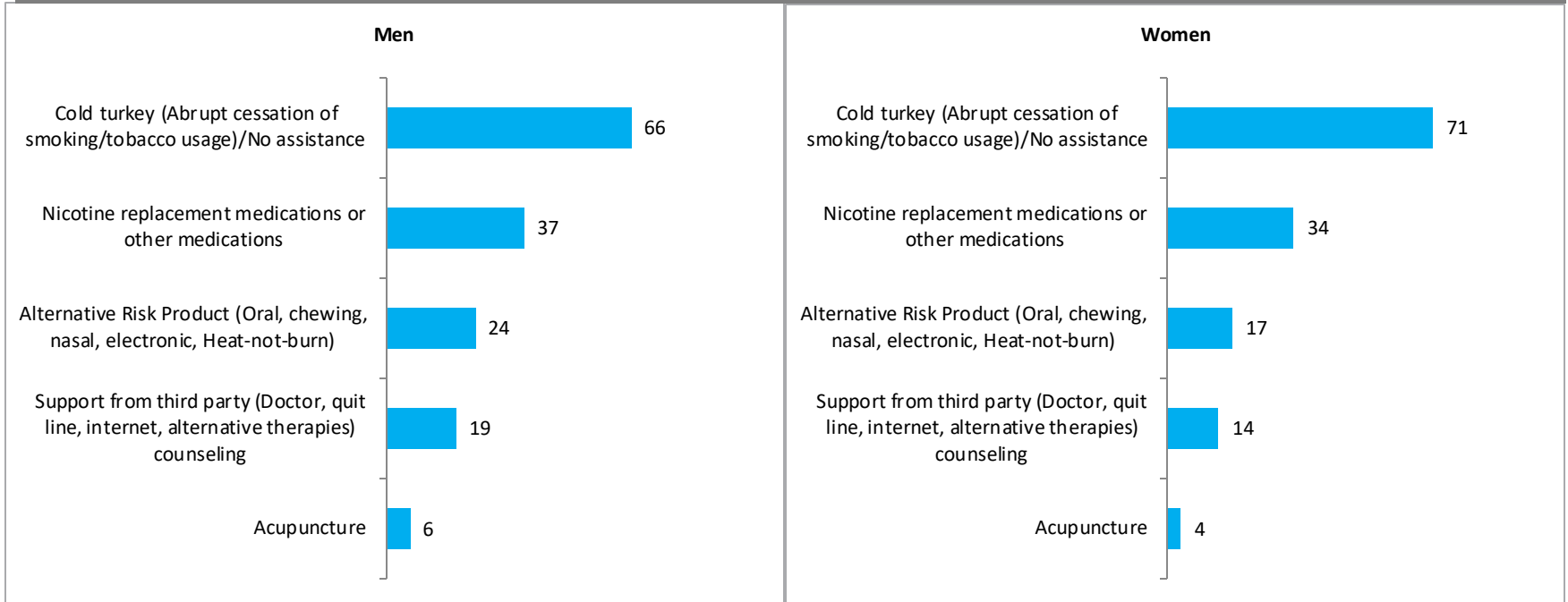
Cold turkey is the main method of quitting for the vast majority- followed by nicotine replacement medications.

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



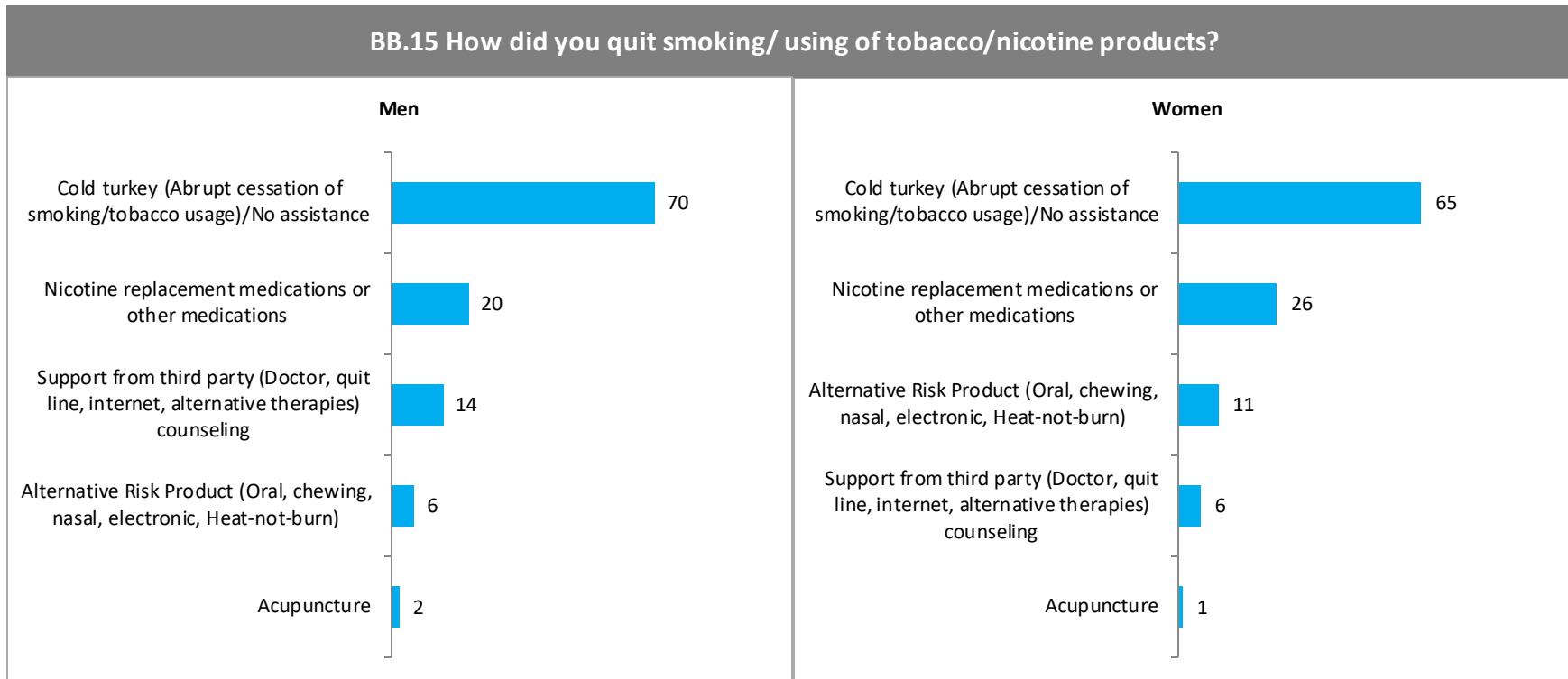
among both men and women, cold turkey is the main method of quitting for the vast majority.

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



Ways Adapted For Quitting - Among Quitters

Among both men and women, cold turkey is the main method of quitting for the vast majority.

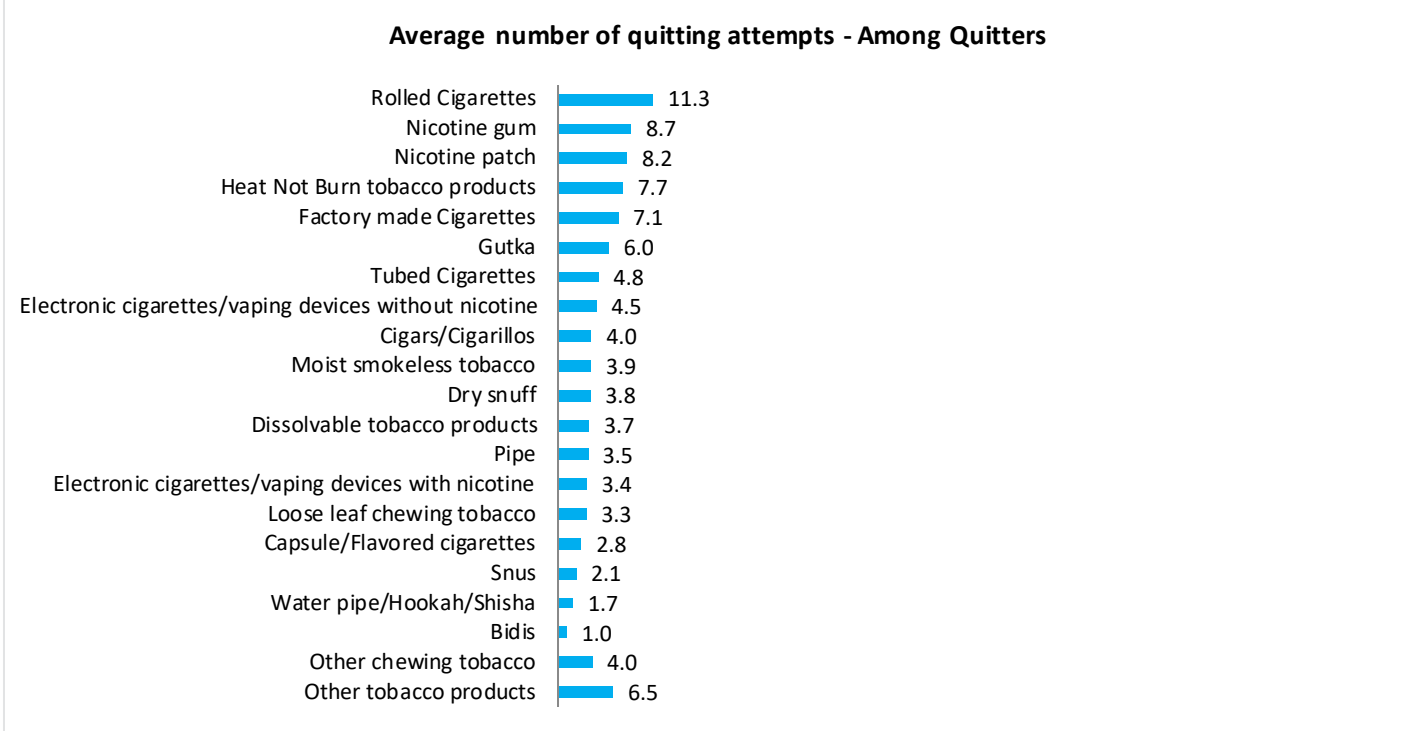


Figures are in %
Base : Random Sample,, Current Users who attempted to Quitters Men : n = 133 Women : n = 148

Quitting Attempts by products : Among Quitters

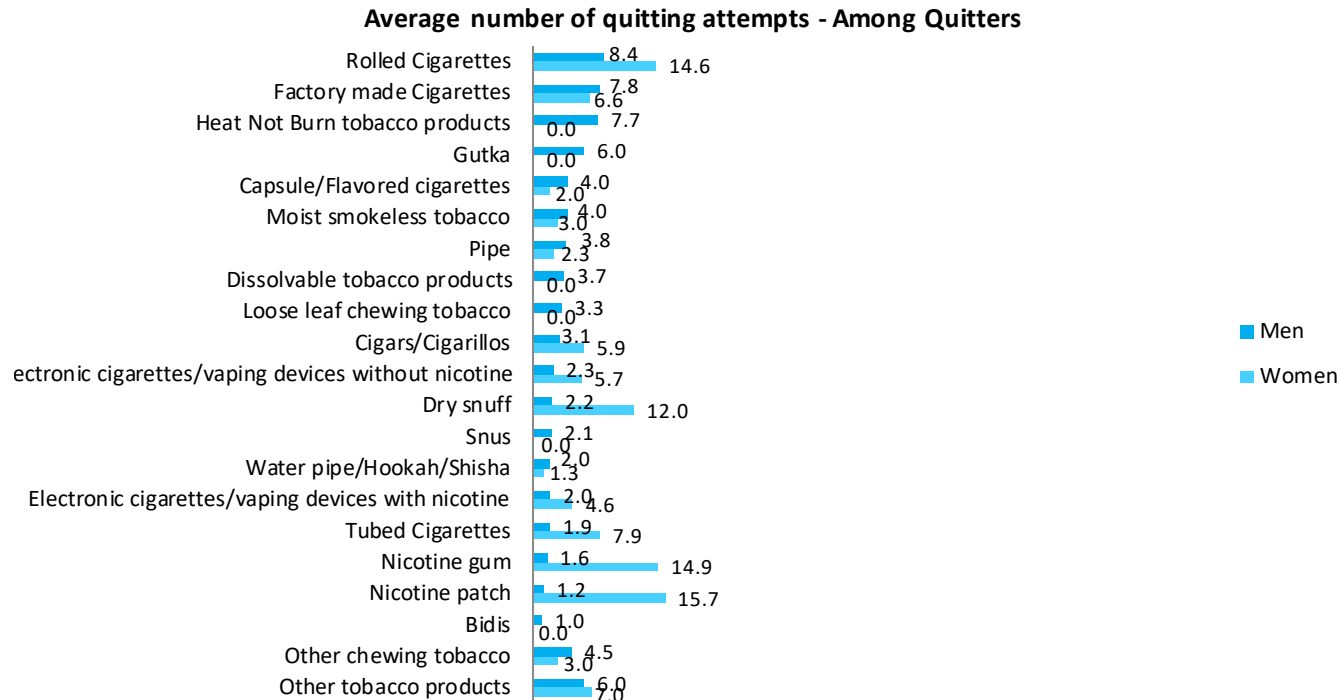
Across products, multiple numbers of quitting attempts were noted - with rolled cigarettes topping the list.

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



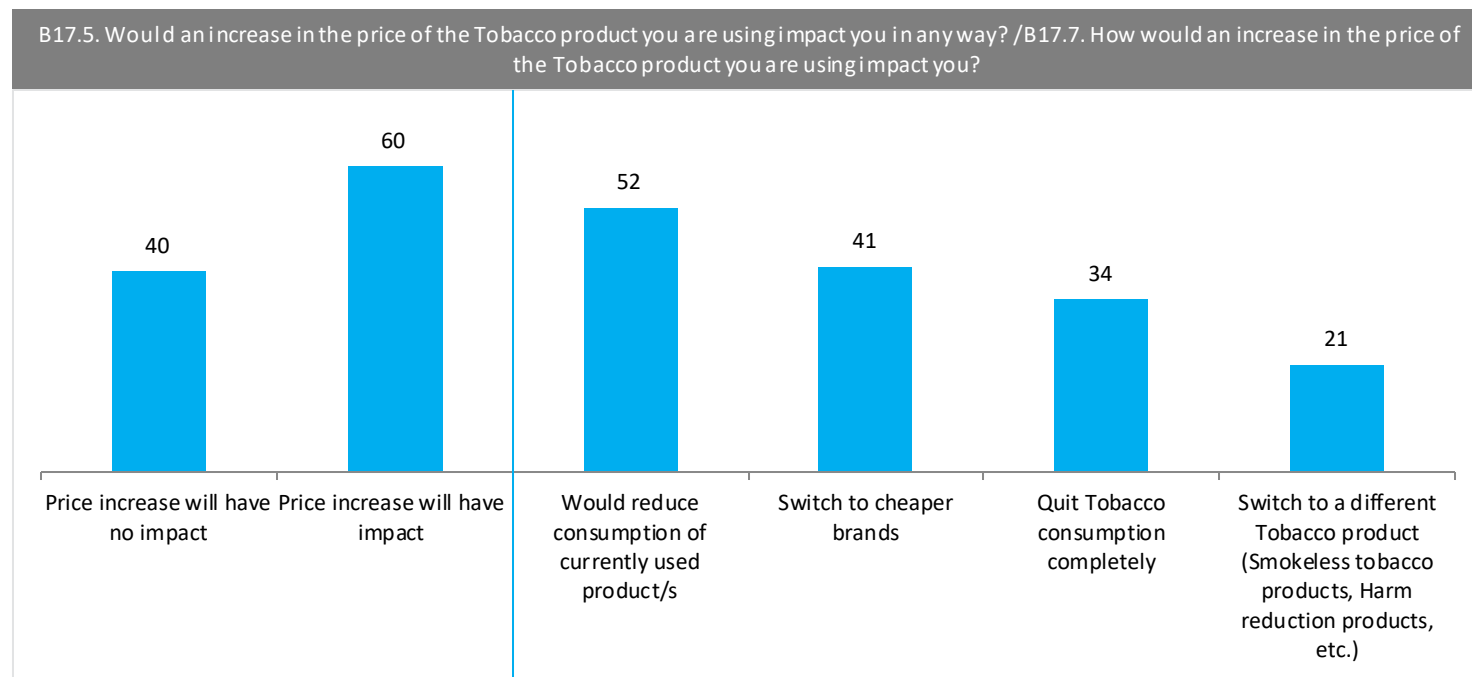
Quitting Attempts by products : Among Quitters

Across products, average attempts at quitting among women are higher - with the exception of cigarettes, where men are slightly elevated.



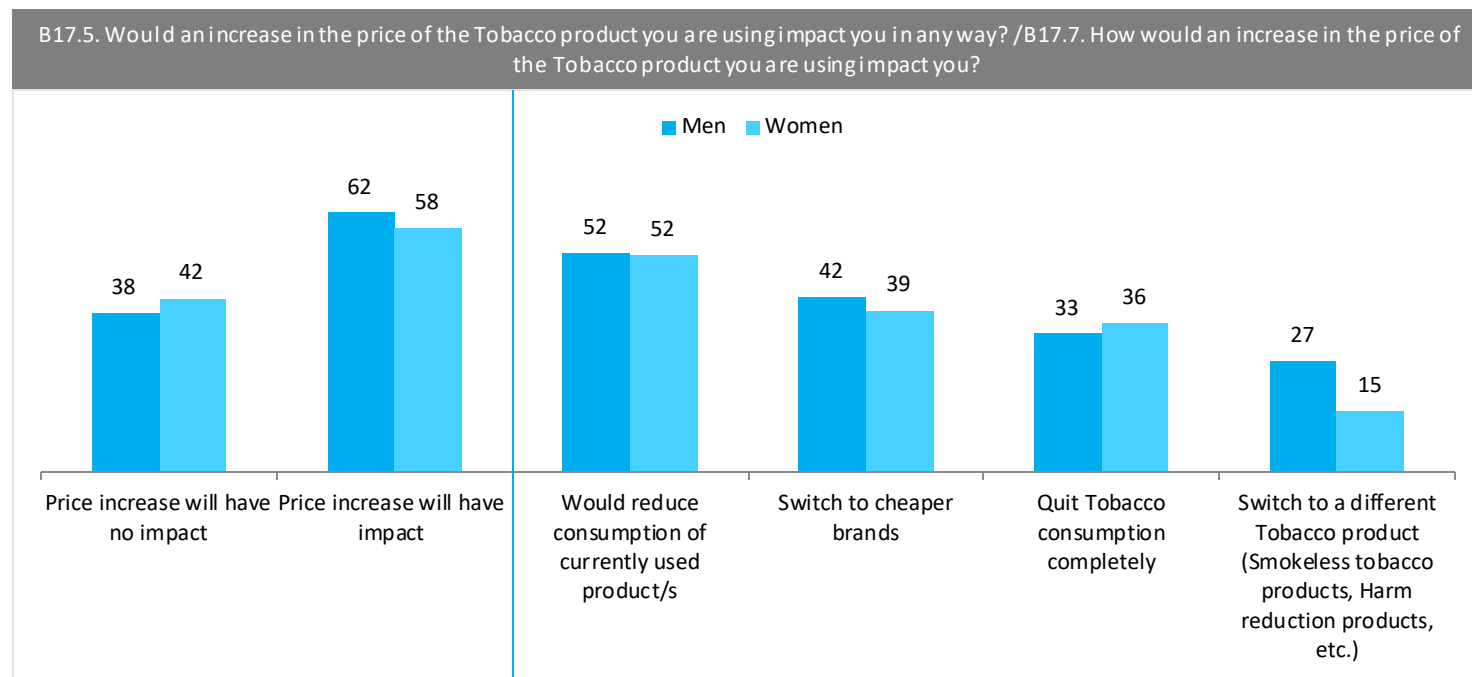
Impact of price increase of the tobacco products/other products

60% of the users claim there will be an impact from a price increase; to cope with the price increase, 52% claim they will reduce consumption.



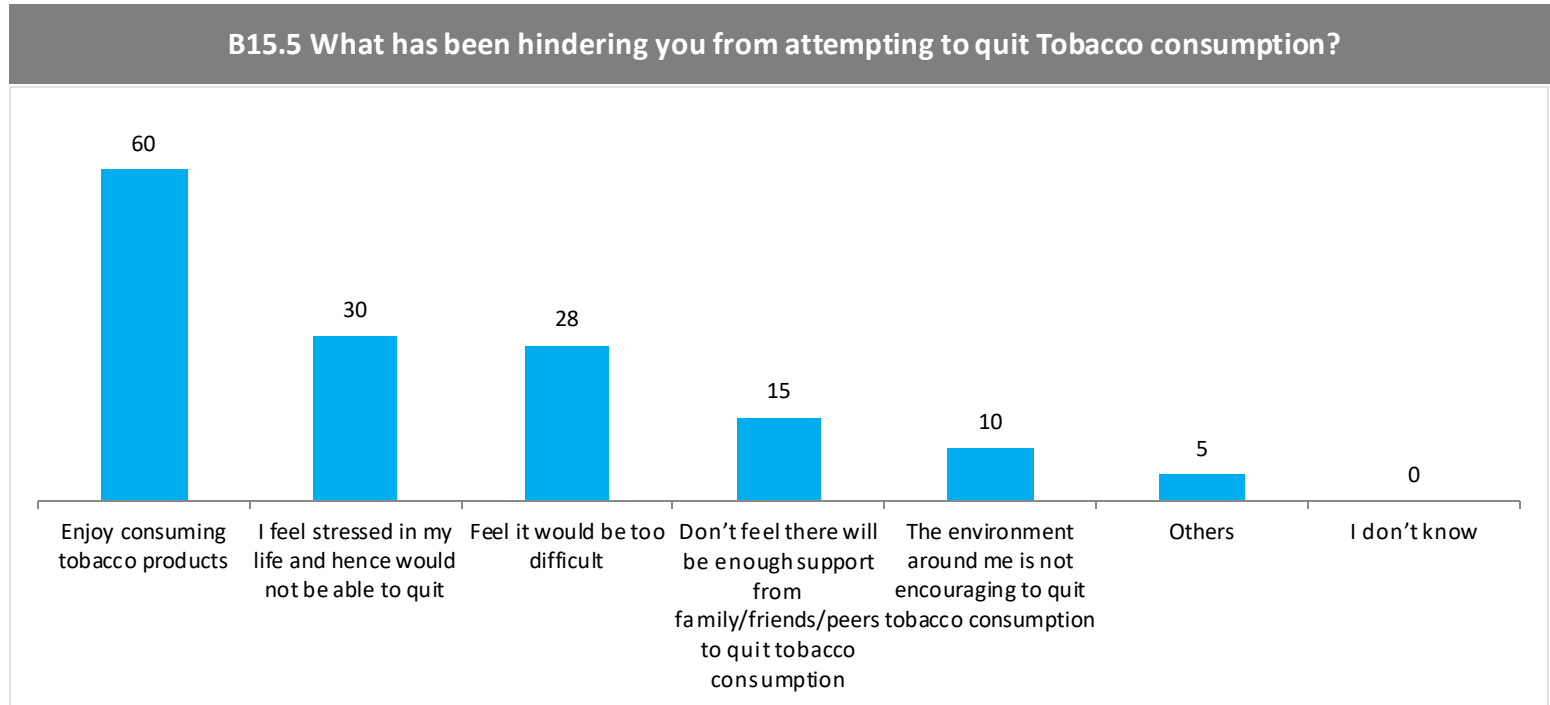
Impact of price increase of the tobacco products/other products

Among both men and women, the majority of consumers 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.



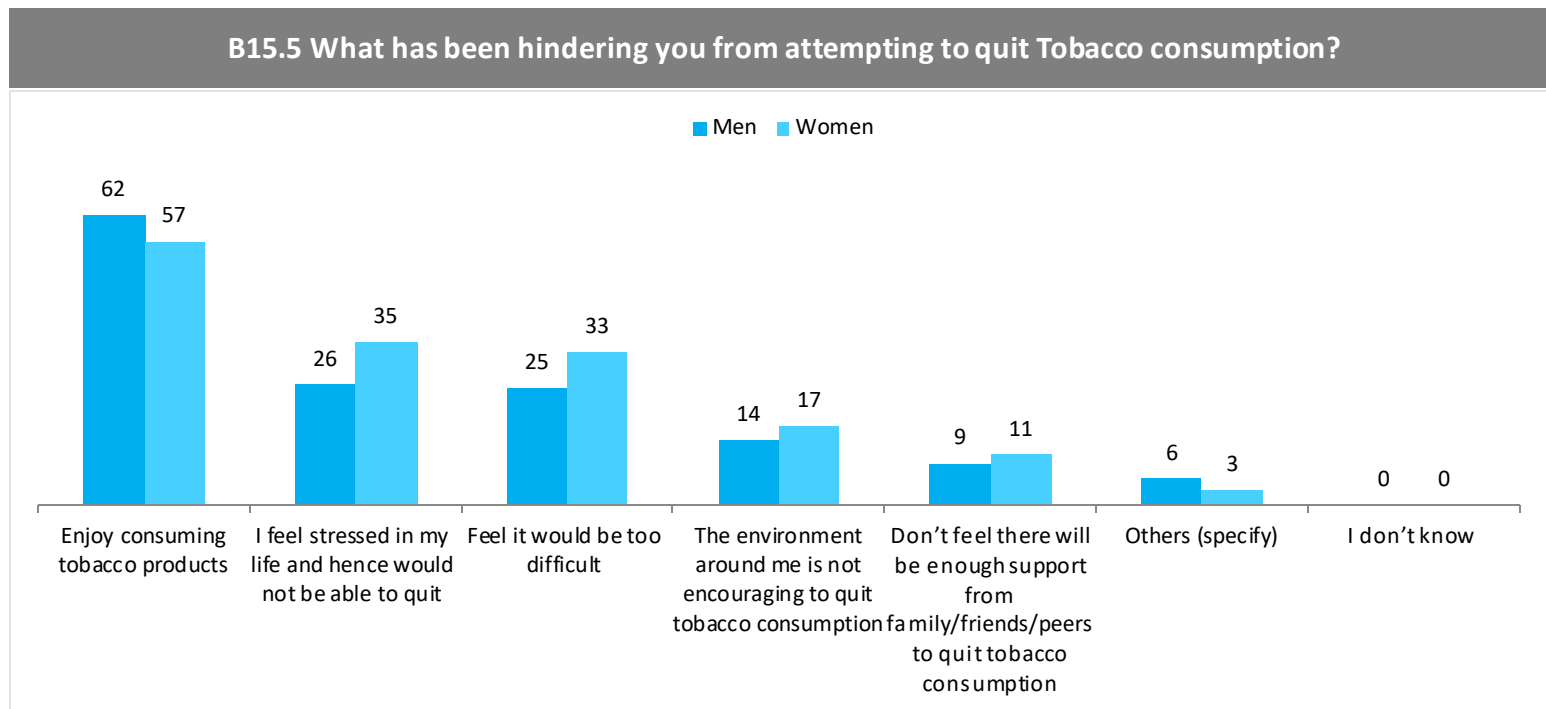
Hindrances in Quitting Tobacco Consumption

Apart from enjoying consuming tobacco products (62%), feeling stressed(30%) surfaced as one of the main hindrances to quit.



Hindrance in Quitting Tobacco Consumption

Women opined higher than men that feeling stressed was one of the major hindrances in quitting smoking.



n %

Sample, Current Users of tobacco products who are not planning to quit Men: n=301 Women: n=222

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	1096	927	133	148
Less than high school	1	2	1	0
Completed some high school	3	3	2	5
High school graduate	22	23	23	17
Job-specific training program(s) after high school	3	5	2	5
Some college, but no degree	23	29	35	28
Associate degree	12	14	11	14
Bachelor's degree (such as B.A., B.S.)	22	17	22	15
Some graduate school, but no degree	2	2	0	3
Graduate degree (such as MBA, MS, M.D., Ph.D.)	13	6	5	14

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n=1096 Women : n=927, Quitters Men : n =133 Women : n=148

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	1096	927	133	148
Single	36	19	43	20
Unmarried, In a steady relationship and not living together	3	3	6	2
Unmarried, In a steady relationship and living together	9	15	6	15
Engaged	1	2	1	5
Married	40	41	32	34
Separated	1	2	3	3
Divorced	8	11	7	16
Widowed	1	6	2	5
Having Kids				
Have children at home below 14 living in the household	42	43	26	42
Don't have any children at home / No children below 14 living in the household	55	52	70	55

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n=1096 Women : n=927, Quitters Men : n=133 Women : n=148

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	1096	927	133	148
Working now	71	51	61	54
Only temporarily laid off, sick leave, or maternity leave	1	1	0	3
Looking for work, unemployed	8	7	11	4
Retired	8	15	11	14
Disabled, permanently, or temporarily	5	7	5	9
Keeping house	2	13	0	9
Student	4	4	8	4
Others	1	1	2	2

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n=1096 Women : n=927, Quitters Men : n=133 Women : n=148

Profile Comparison

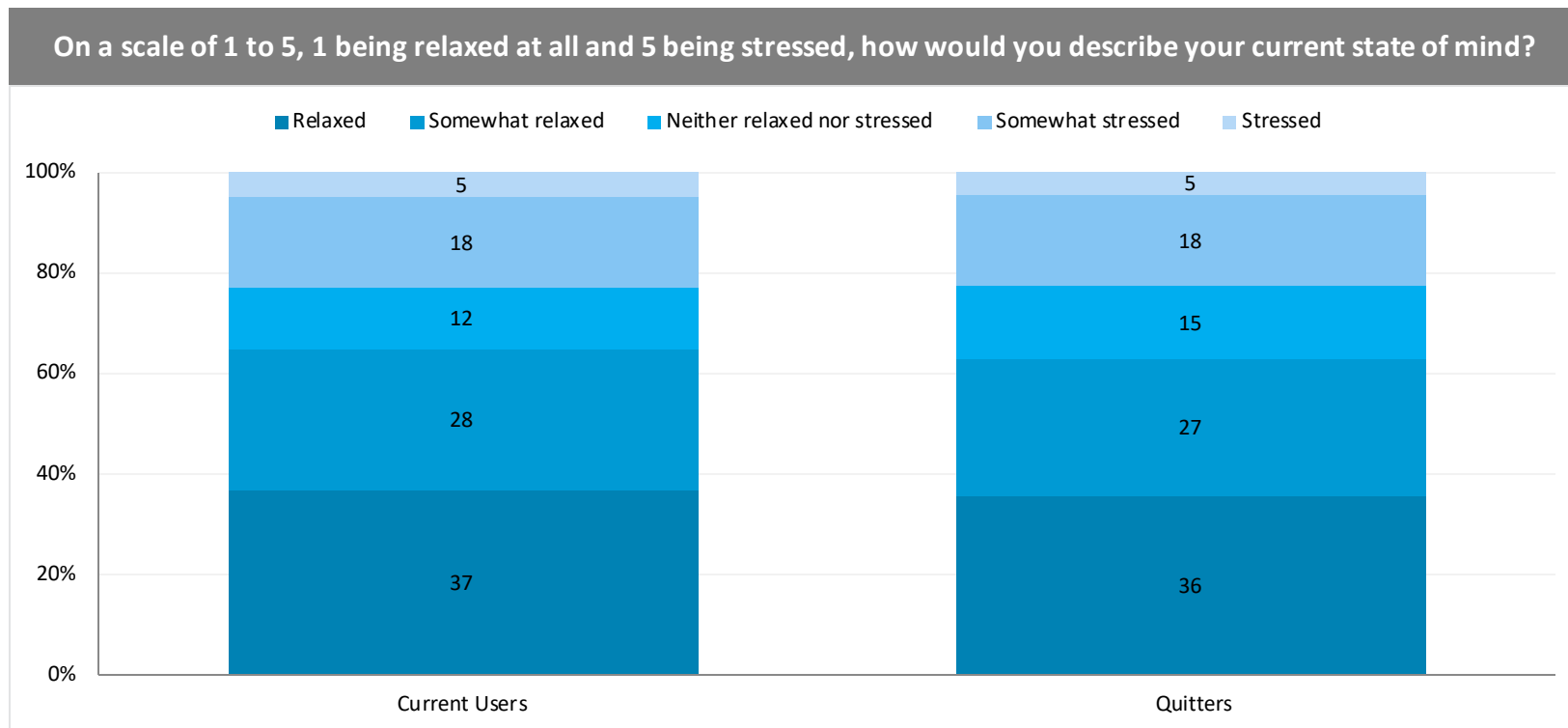
Profile of Current Users and Quitters				
	Current Users/ Vapers/ Smokers		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Annual Income	1096	927	133	148
Under \$15,000	8	10	9	11
\$15,000 to \$24,999	8	10	10	11
\$25,000 to \$34,999	10	12	13	11
\$35,000 to \$49,999	13	15	20	16
\$50,000 to \$79,999	18	19	20	21
\$75,000 to \$99,999	17	17	15	12
\$100,000 to \$124,999	11	8	3	5
\$125,000-\$149,999	6	4	2	5
\$150,000-\$199,999	5	3	2	3
Over \$200,000	3	2	2	2
During the last twelve months, would you say you had trouble paying your bills?				
No	56	48	57	53
Yes	43	50	38	45

Figures are in %

Base : Random Sample, Current Users of tobacco products Men : n=1096 Women : n=927, Quitters Men : n =133 Women : n=148

Comparison between Users & Quitters

Approximately 65% of both current users & quitters feel relaxed/ somewhat relaxed.

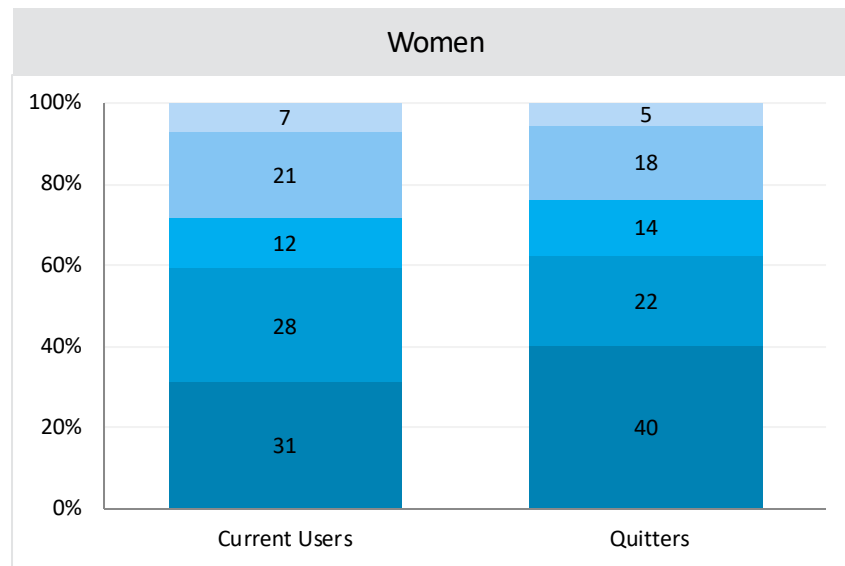
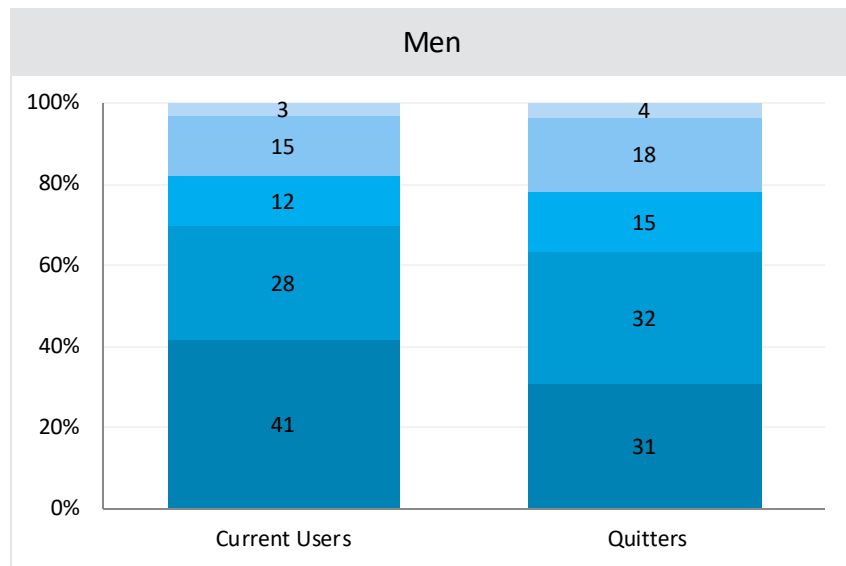


Comparison between Users & Quitters

Among women, higher numbers of quitters feel relaxed/somewhat relaxed compared to men.

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=1096 Women : n=927, Quitters Men : n=133 Women : n=148

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