

FOUNDATION FOR A
SMOKE-FREE WORLD

GLOBAL STATE OF SMOKING POLL - 2019

INDIA

CONTENTS

1. Background
2. Methodology
3. Key Findings
4. Detailed Findings
 - I. Usage details of various tobacco products
 - II. Beliefs and perception – Among current users of Tobacco Products
 - III. Quitting and Quitters

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:

- Computer Aided Face to Face Interviews

Sample Size:

Thirty pilot interviews were conducted prior finalizing the questionnaires

n: 41673 interviews

Target Group:

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

Fieldwork Duration:

- 17th June, 2019 to 27th September, 2019

3. KEY FINDINGS

Current usage landscape of tobacco products

- Current users of tobacco products were classified into four groups –
 - Exclusive combustible tobacco smokers excluding bidis(39%); the majority were exclusive *cigarette* smokers (38%)
 - Exclusive bidi smokers (7%)
 - Exclusive smokeless tobacco users (30%); these users mainly consumed gutka (22%) and loose-leaf chewing tobacco (8%)
 - Dual/poly product users (22%); product use included cigarettes (17%), bidis (14%) and gutka (11%).
 - Heat-not-burn products and e-cigarette use were seldom reported (~0%). Awareness of heat-not-burn products and e-cigarettes was minimal.
- 31% of exclusive bidi smokers claimed they started smoking before the legal smoking age of 18 years. Underage smoking was also quite prevalent (21%) among exclusive cigarettes smokers.
- 19% of current cigarette smokers are moderately or highly dependent on nicotine.

Beliefs and Perception Among Current Users of Tobacco products

- The majority (75%- 86%) of all four current user groups believed smoking is harmful to their health.
- All four current user groups rated both cigarettes (71%-76%) and nicotine (52%-64%) as harmful to their health.
- The majority of all four current user groups believed *nicotine* is harmful (63%-73%) and that it is the primary cause of tobacco-related cancer (65%-73%).

Quitting and Quitters

- The proportion of current users in the 18-38 years age group was higher among men than women. The proportion of female quitters in the 51-69 years age group was higher than male quitters.
- Among women, more current users than quitters believed that tobacco consumption was a risk factor for melanoma and low birthweight.
- Half of current users claimed they attempted to quit tobacco and 40% of current users claimed they were planning to quit.
- The harmful health effects of tobacco was the main reason selected for quitting or attempting to quit. Nicotine replacement medications followed by support from third-party were the most reported means of quitting.
- 47% of current tobacco users claimed that a price increase would impact their consumption behavior; the majority of them (70%) would reduce consumption if prices increased.
- Apart from enjoying tobacco products (58%), difficulty in quitting (52%) was reported as one of the main obstacles to quitting.
- The number of quit attempts were higher among men than women irrespective of the product consumed.

4. DETAILED FINDINGS

Achieved Sample : Quantitative Module

Sample by Demographics		
	n	%
All	41673	100
Men	35513	85
Women	6158	15
Others	2	0
18-24yrs	8474	20
25-35yrs	14954	36
36-50 yrs	11483	28
51-69 yrs	6762	16
Large Cities	18873	45
Small & Medium Cities	12999	31
Rural	9801	24
Current users of tobacco and other products	35526	85
Quitters (who quit tobacco in last 5 years)	6147	15

Inclusive of 1000 booster interviews among the females who are current users of tobacco products/ other products.

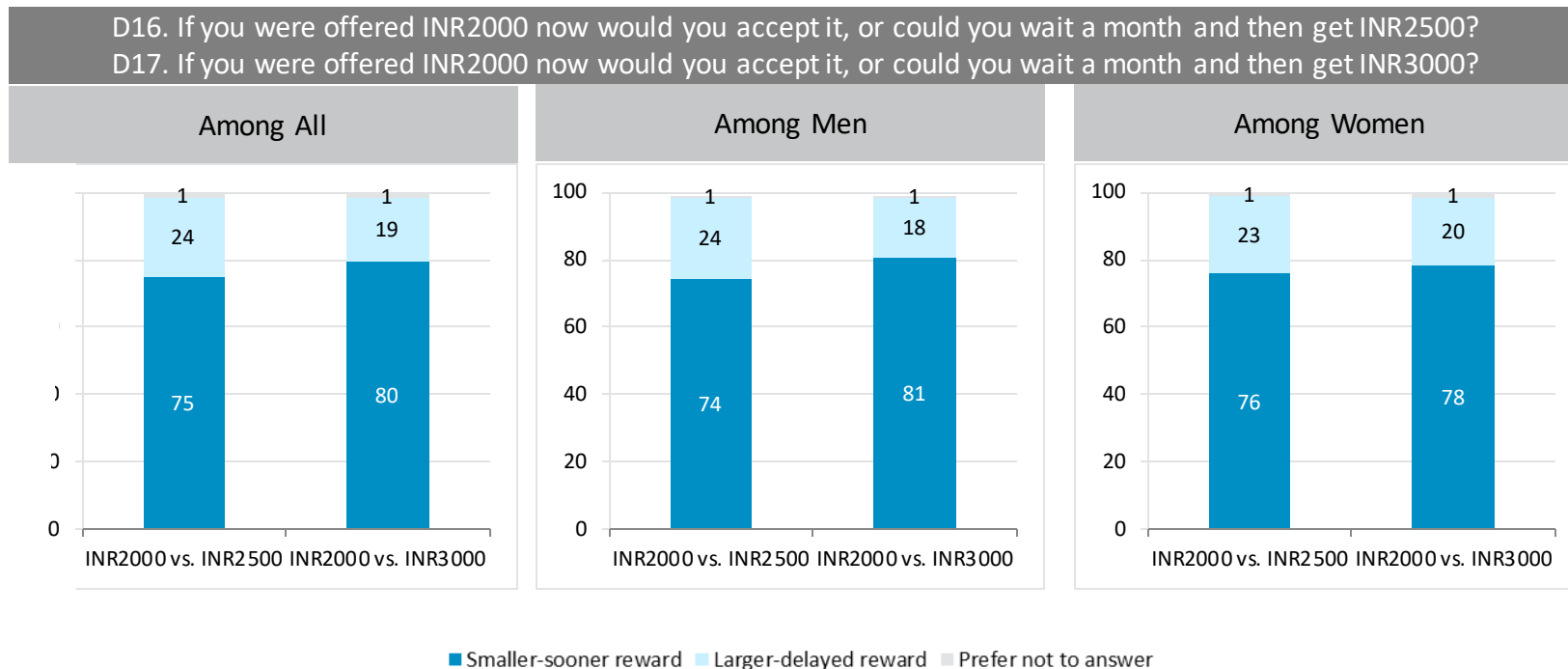
Achieved Sample : Quantitative Module

Sample by Demographics		
	n	%
All	41673	100
Central Region	8245	20
Eastern Region	8311	20
Northern Region	8681	20
Southern Region	8146	20
Western Region	8290	20

Inclusive of 1000 booster interviews among the females who are current users of tobacco products/ other products.

Smaller-sooner reward vs. Larger- delayed reward

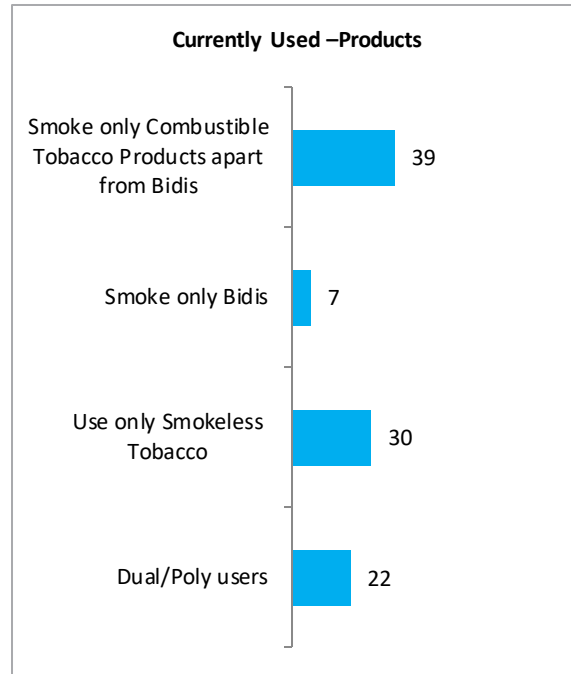
Respondents opted for smaller-sooner rewards in case of both a one-month & six-month waiting period.



4.1 Usage details of various Tobacco products

Current usage of products

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



Smoke less tobacco products : Chewing tobacco, smokeless tobacco, snus etc.

Dual/Poly Users : Use more than one products currently

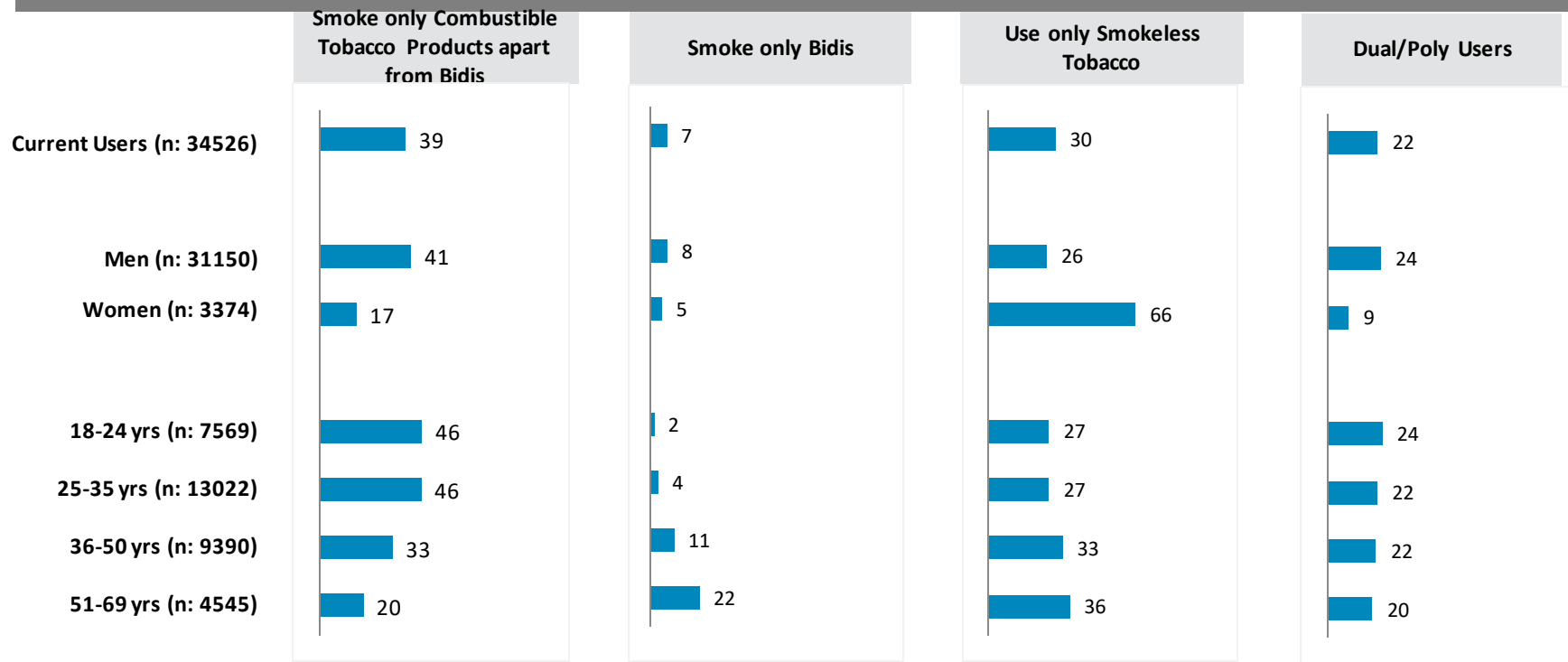
Figures are in %

Base : Random Sample, Users : n= 34526

Q. C1. Of the following Tobacco products, which products are you currently consuming? (Select all that apply)

Current usage of products by demographic groups (1/2)

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

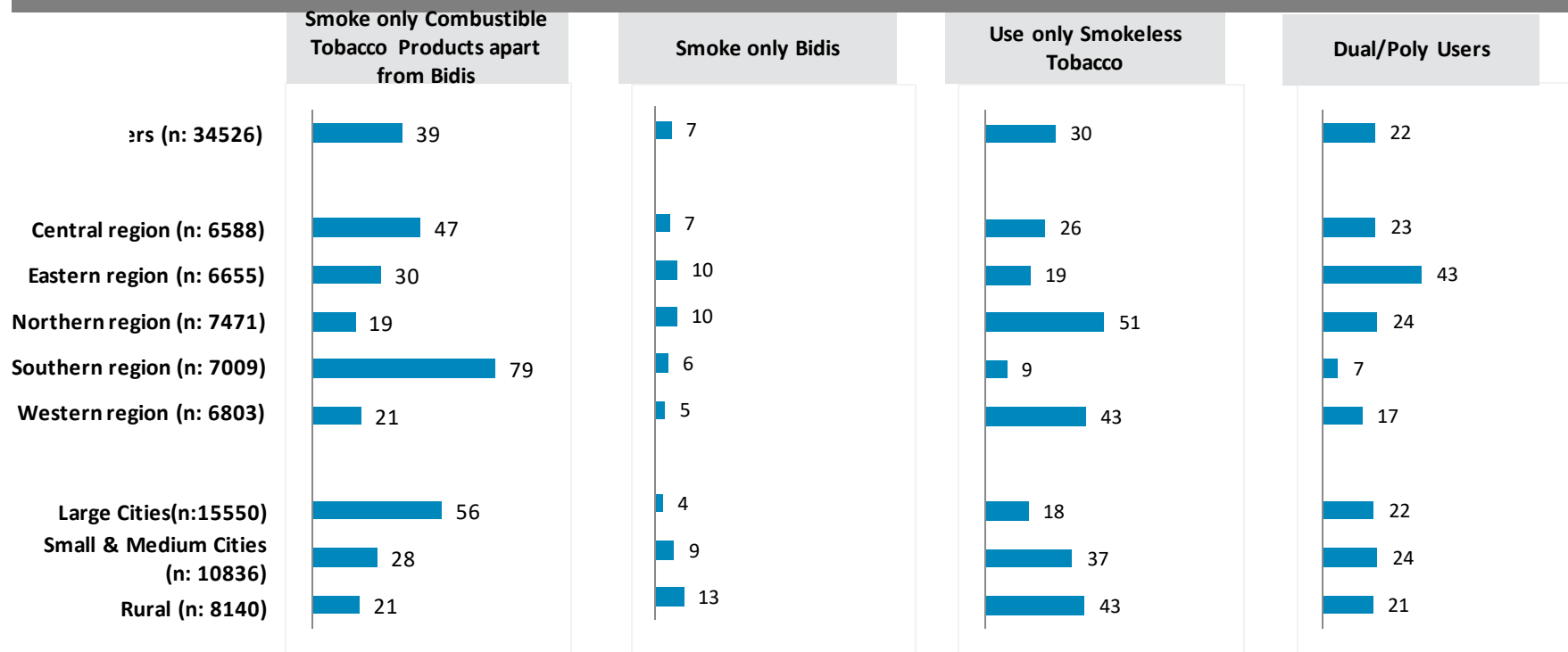


Figures are in %

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

Current usage of products by demographic groups (2/2)

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 :

Smoke only Combustible Tobacco Products apart from Bidis (1/3)

Smoke only Combustible Tobacco Products apart from Bidis

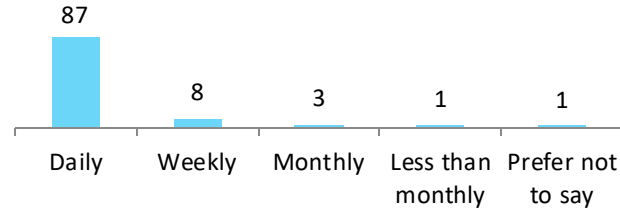
Current Usage (Among all users of tobacco and other products)

9% of current smokers Smoke only Combustible Tobacco Products apart from Bidis

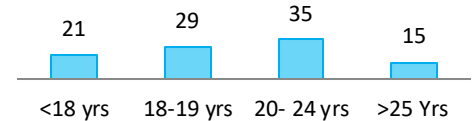
3% of current smokers only smoke Cigarettes

% of current smokers only smoke Water pipe

Consumption Frequency



Age of Starting Cigarette Smoking



Figures are in %

Base : Random Sample, Smoke only Combustible Tobacco Products apart from Bidis

: n= 13454

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'?

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

Usage at a glance :

Smoke only Combustible Tobacco Products apart from Bidis (2/3)

Smoke only Combustible Tobacco Products apart from Bidis				
Profile	% of Smokers	Average Age of starting smoking	% of daily smokers (Among the current users of Cig.)	Average monthly spend on Combustible Tobacco products apart from Bidis (INR)
All Current users of tobacco/other products	39	20	87	1156
Men (n: 31150)	41	20	87	1169
Women (n: 3374)	17	22	68	853
18-24 yrs (n: 7569)	46	18	85	1002
25-35 yrs (n: 13022)	46	20	86	1196
36-50 yrs (n: 9390)	33	22	90	1252
51- 69 yrs (n: 4545)	20	23	88	1160

Figures are in %

Base : Random Sample, Sample, Smoke only Combustible Tobacco Products apart from Bidis

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

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

Usage at a glance :

Smoke only Combustible Tobacco Products apart from Bidis (3/3)

Smoke only Combustible Tobacco Products apart from Bidis				
Profile	% of Smokers	Average Age of starting smoking	% of daily smokers (Among the current users of Cig.)	Average monthly spend on Combustible Tobacco products apart from Bidis (INR)
All Current users of tobacco/other products	39	20	87	1156
Central region (n: 6588)	47	19	78	1549
Eastern region (n: 6655)	30	20	92	897
Northern region (n: 7471)	19	22	72	1005
Southern region (n: 7009)	79	21	90	1118
Western region (n: 6803)	21	20	98	967
Large Cities (n:15550)	56	21	87	1158
Medium and Small Cities (n:10836)	28	20	86	1307
Rural (n: 8140)	21	21	84	875

Figures are in %

Base : Random Sample, Sample, Smoke only Combustible Tobacco Products apart from Bidis

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

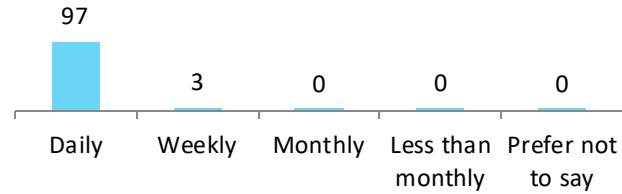
C6. How old were you when you first started smoking/consuming tobacco regularly?

Smoke only Bidis

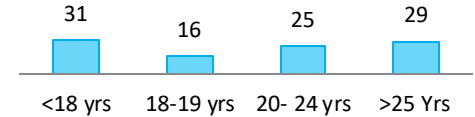
Current Usage (Among all users of tobacco and other products)

% of current smokers only smoke Bidis

Consumption Frequency



Age of Starting Cigarette Smoking



Figures are in %

Base : Random Sample, Smoke only Bidis n;2570

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 :

Smoke only Bidis (2/3)

Smoke only Bidis				
Profile	% of Cig. Smokers	Average Age of starting Bidi smoking	% of daily smokers (Among the current users of Cig.)	Average monthly spend on Bidi (INR)
All Current users of tobacco/other products	7	21	97	419
Men (n: 31150)	8	21	97	426
Women (n: 3374)	5	29	86	336
18-24 yrs (n: 7569)	2	17	96	364
25-35 yrs (n: 13022)	4	19	93	421
36-50 yrs (n: 9390)	11	21	97	429
51- 69 yrs (n: 4545)	22	23	98	417

Figures are in %

Base : Random Sample,

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

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

Usage at a glance :

Smoke only Bidis (3/3)

Smoke only Bidis				
Profile	% of Cig. Smokers	Average Age of starting Bidi smoking	% of daily smokers (Among the current users of Cig.)	Average monthly spend on Bidi (INR)
All Current users of tobacco/other products	7	21	97	419
Central region (n: 6588)	7	20	93	608
Eastern region (n: 6655)	10	19	97	278
Northern region (n: 7471)	10	23	95	383
Southern region (n: 7009)	6	20	100	505
Western region (n: 6803)	5	26	100	418
Large Cities (n:15550)	4	22	94	393
Medium and Small Cities (n:10836)	9	21	97	385
Rural (n: 8140)	13	22	98	467

Figures are in %

Base : Random Sample,

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

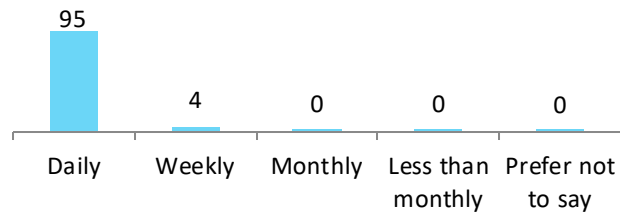
C6. How old were you when you first started smoking/consuming tobacco regularly?

Use Smokeless Tobacco

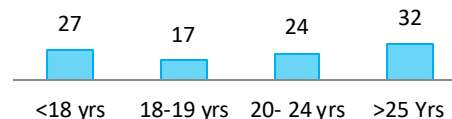
Current Usage (Among all users of tobacco and other products)

- 0% of current smokers smoke Cigarettes
- 1% of current users use only Gutka
- % of current users use only Loose Leaf Chewing Tobacco
- % of current users use only snus

Consumption Frequency



Age of Starting Smokeless Tobacco Products



Figures are in %

Base : Random Sample, Use Smokeless Tobacco Products n;10394

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 :

Use only Smokeless Tobacco Products (2/3)

Smokeless Tobacco				
Profile	% of Users	Average Age of starting Smokeless Tobacco Products	% of daily users (Among the current solus users of Smokeless tobacco Products.)	Average monthly spend On Smokeless Tobacco Products (INR)
All Current users of tobacco/other products	30	23	95	606
Men (n: 31150)	26	22	96	673
Women (n: 3374)	66	28	90	360
18-24 yrs (n: 7569)	27	18	96	702
25-35 yrs (n: 13022)	27	21	95	697
36-50 yrs (n: 9390)	33	25	95	549
51- 69 yrs (n: 4545)	36	31	94	401

Figures are in %

Base : Random Sample, Use Smokeless Tobacco Products

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

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

Usage at a glance :

Use only Smokeless Tobacco Products (3/3)

Smokeless Tobacco				
Profile	% of Users	Average Age of starting Smokeless Tobacco Products	% of daily users (Among the current solus users of Smokeless tobacco Products.)	Average monthly spend On Smokeless Tobacco Products (INR)
All Current users of tobacco/other products	30	23	95	606
Central region (n: 6588)	26	22	89	637
Eastern region (n: 6655)	19	26	94	410
Northern region (n: 7471)	51	21	97	745
Southern region (n: 7009)	9	32	79	259
Western region (n: 6803)	43	24	99	571
Large Cities (n:15550)	18	23	92	659
Medium and Small Cities (n:10836)	37	24	96	598
Rural (n: 8140)	43	23	97	572

Figures are in %

Base : Random Sample, Use Smokeless Tobacco Products

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

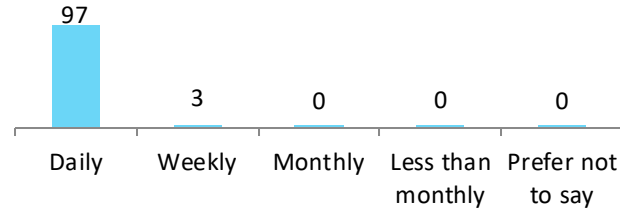
C6. How old were you when you first started smoking/consuming tobacco regularly?

Dual/Poly Users

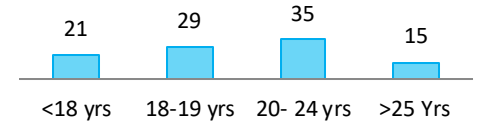
Current Usage (Among all users of tobacco and other products)

- 22%** of current users use multiple products
- 7%** of current users are smoking Cigarettes along with other products
- 4%** of current users are using Gutka along with other products
- 1%** of current users are smoking Bidis along with other products

Consumption Frequency of the most frequently used product



Age of Starting Smoking/using the first product



Figures are in %

Base : Random Sample, Dual/Poly Uses n;34526

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 :

Dual /Poly users (2/3)

Dual/Poly Users				
Profile	% of dual/poly users	Average Age of starting smoking/using the first product	% of daily users	Average monthly spend on products (INR)
All Current users of tobacco/other products	22	20	97	1156
Men (n: 31150)	24	20	97	1169
Women (n: 3374)	9	22	86	853
18-24 yrs (n: 7569)	24	18	96	1002
25-35 yrs (n: 13022)	22	20	93	1196
36-50 yrs (n: 9390)	22	22	97	1252
51- 69 yrs (n: 4545)	20	23	98	1160

Figures are in %

Base : Random Sample, Dual/Poly Uses

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

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

Usage at a glance :

Dual /Poly users (3/3)

Dual/Poly Users				
Profile	% of dual/poly users	Average Age of starting smoking/using the first product	% of daily users	Average monthly spend on products (INR)
All Current users of tobacco/other products	22	20	97	1156
Central region (n: 6588)	23	19	93	1549
Eastern region (n: 6655)	43	20	97	897
Northern region (n: 7471)	24	22	95	1005
Southern region (n: 7009)	7	21	100	1118
Western region (n: 6803)	17	20	100	967
Large Cities (n:15550)	22	21	94	1158
Medium and Small Cities (n:10836)	24	20	97	1307
Rural (n: 8140)	21	21	98	875

Figures are in %

Base : Random Sample, Dual/Poly Uses

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

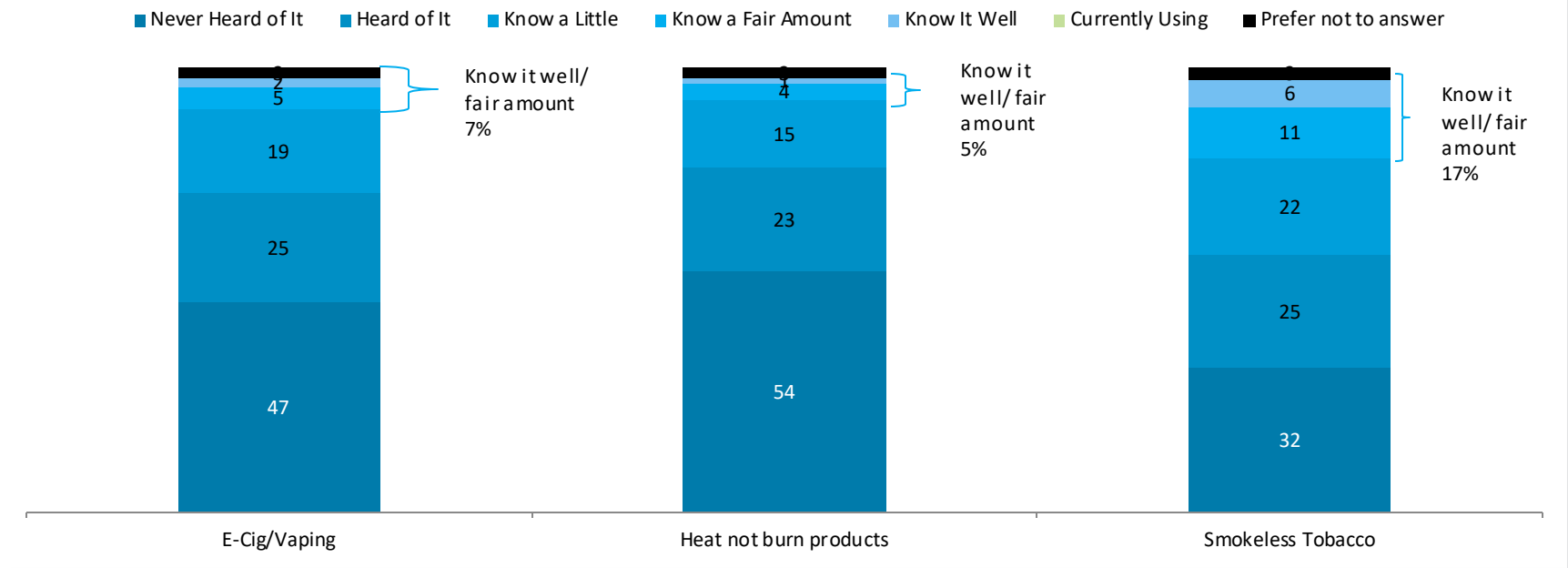
C3. Please select the option that best describes how often you consume 'List Tobacco Product'?

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

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

Only 7% current smokers of Combustible Tobacco products (apart from Bidis) claimed that they are well aware/ know fairly about E- Cigarettes/ Vaping. Heat –not-burn products have even lower awareness.

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



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

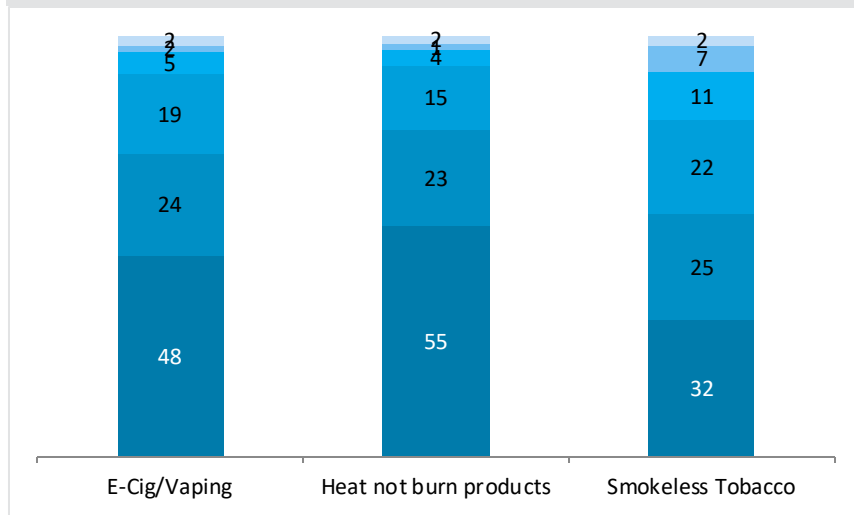
Smoke only Combustible Tobacco Products apart from Bidis

Both among Men and Women smokers E-Cig and Heat-not-burn products have minimal awareness.

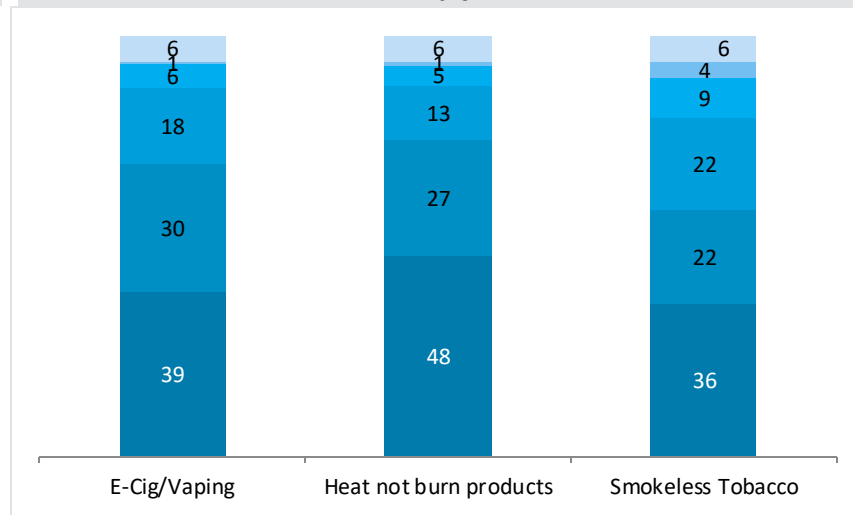
C2. How familiar are you with the following products ..(asked only to the non-users of the products)

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

Men _Smoke only Combustible Tobacco Products apart from Bidis



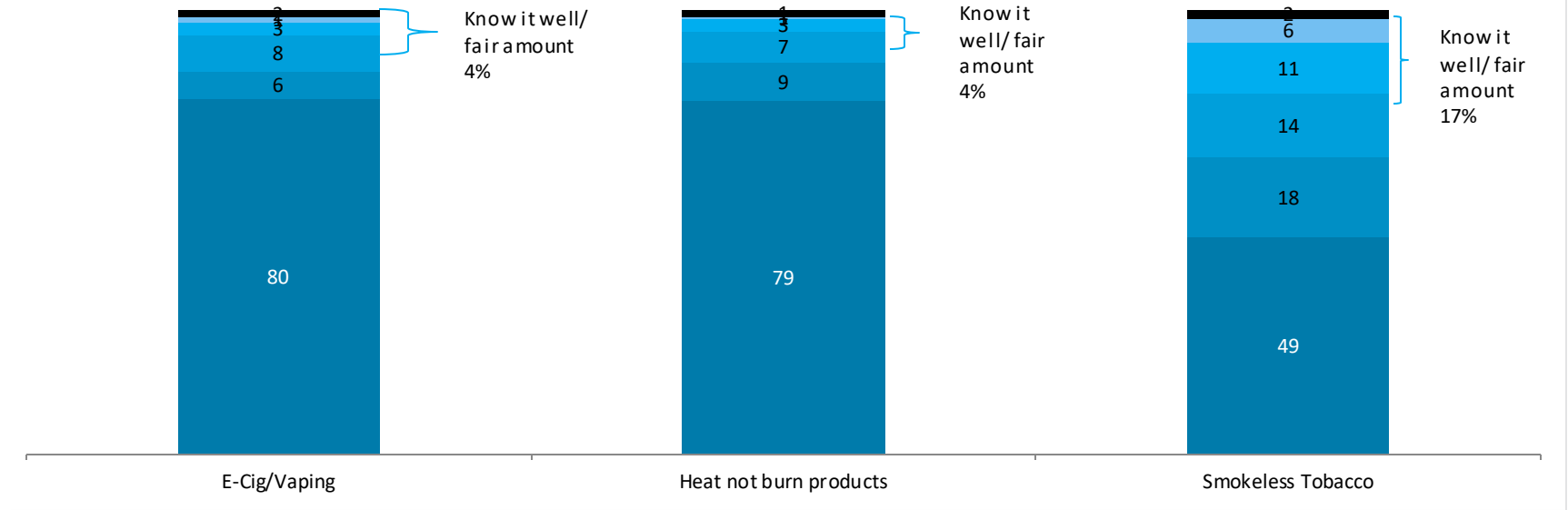
Women _Smoke only Combustible Tobacco Products apart from Bidis



ie majority of current solus Bidi smokers are unaware of E-Cig & Heat-not-burn products.

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



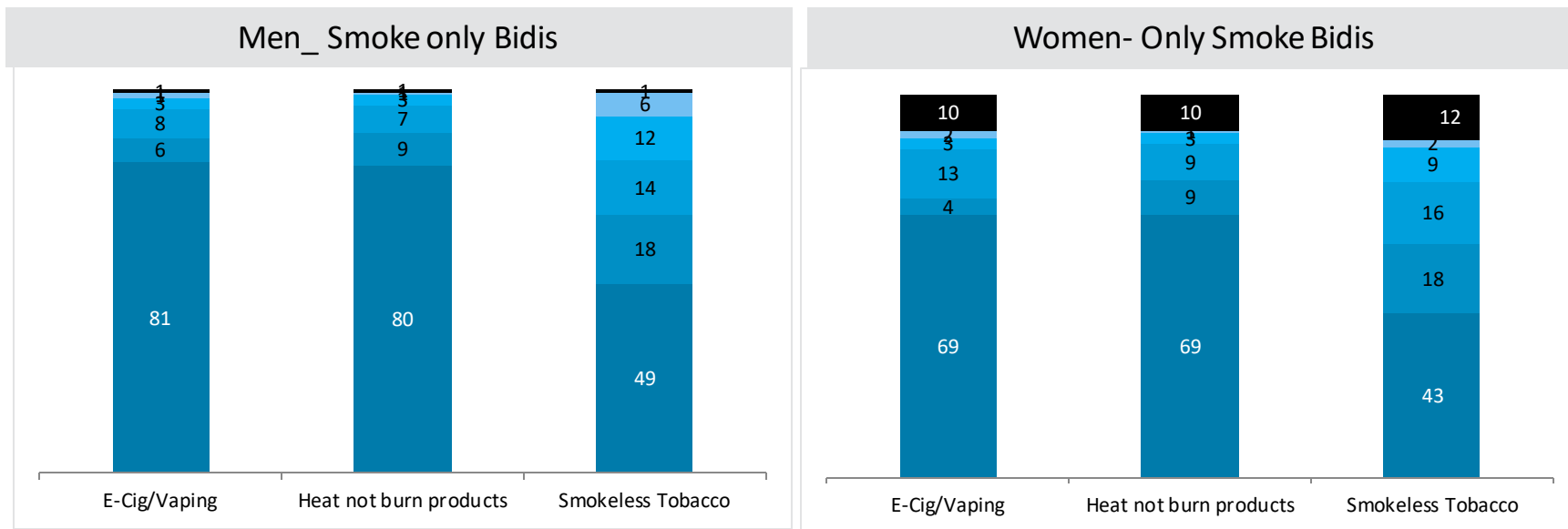
Usage and familiarity of E-Cig, Heat-not-burn and Smokeless tobacco products

Smoke only Bidis

Both men and women solus Bidi smokers are largely unaware of E-Cig/Vaping and Heat-not-burn products.

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

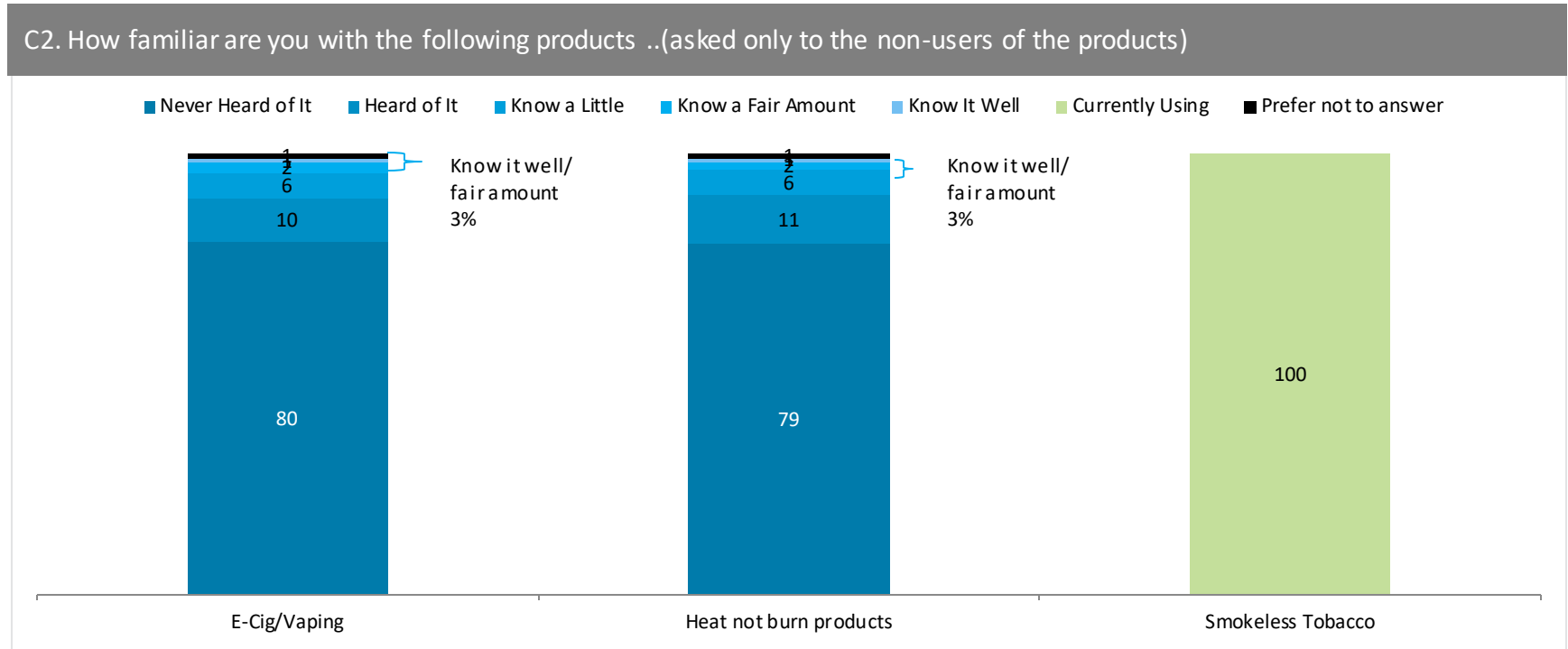
■ Never Heard of It
 ■ Heard of It
 ■ Know a Little
 ■ Know a Fair Amount
 ■ Know It Well
 ■ Currently Using
 ■ Prefer not to answer



e in %

andom + Booster Sample, Current users - Smoke only Bidis Men : n=2392 Women : n=197

E-Cig and Heat-not-burn products have minimal awareness among current solus users of smokeless tobacco products.



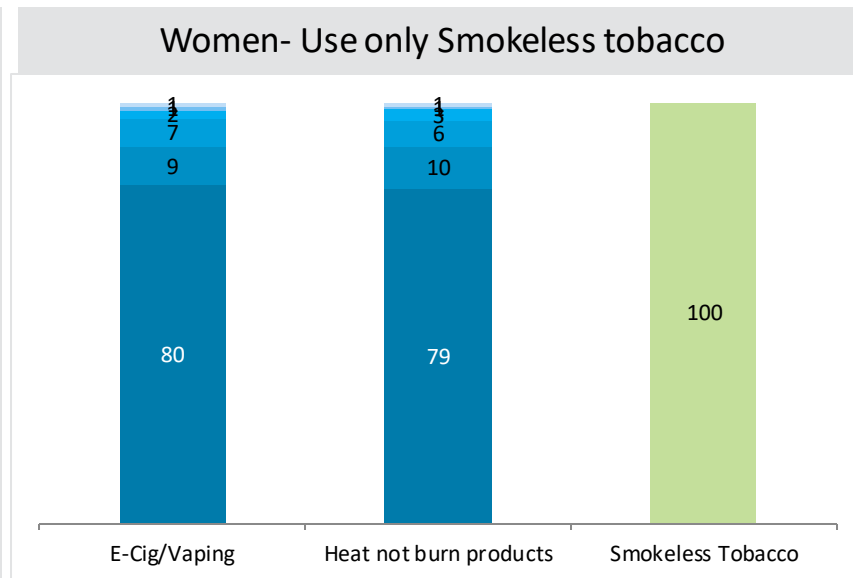
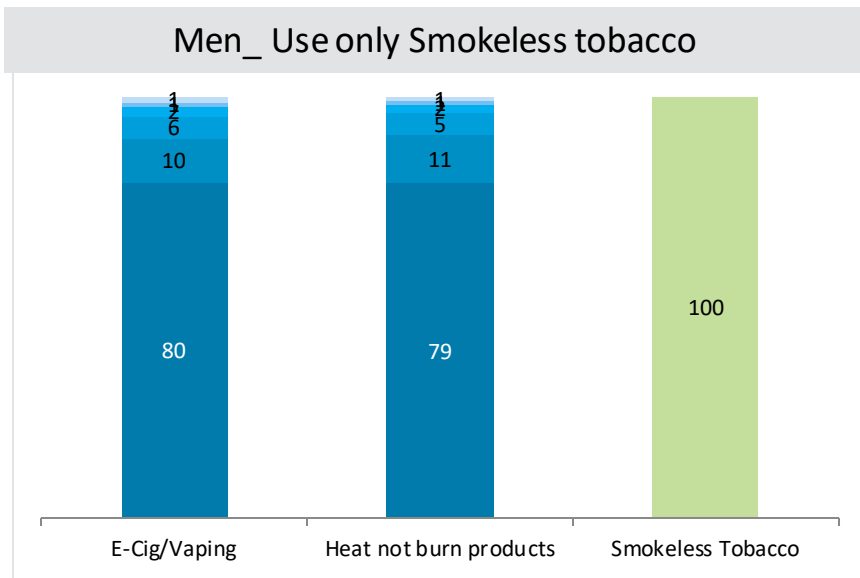
Usage and familiarity of E-Cig, Heat-not-burn and Smokeless tobacco products

Use only Smokeless tobacco

The majority of solus users of Smokeless tobacco have never heard of E-Cig and Heat-not-burn products

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



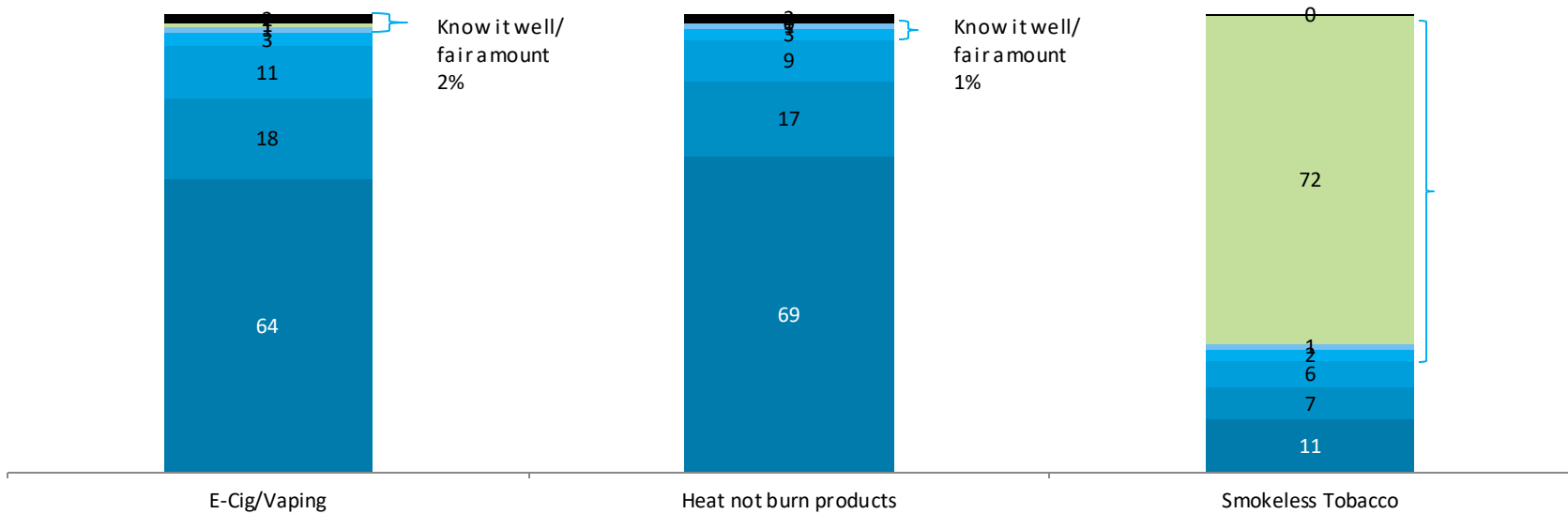
are in %

random + Booster Sample, Current Users_ Use only Smokeless Tobacco Men : n= 8165 Women : n=2801

Majority of current users of tobacco/other products are unaware of E-Cig & Heat-not-burn products.

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



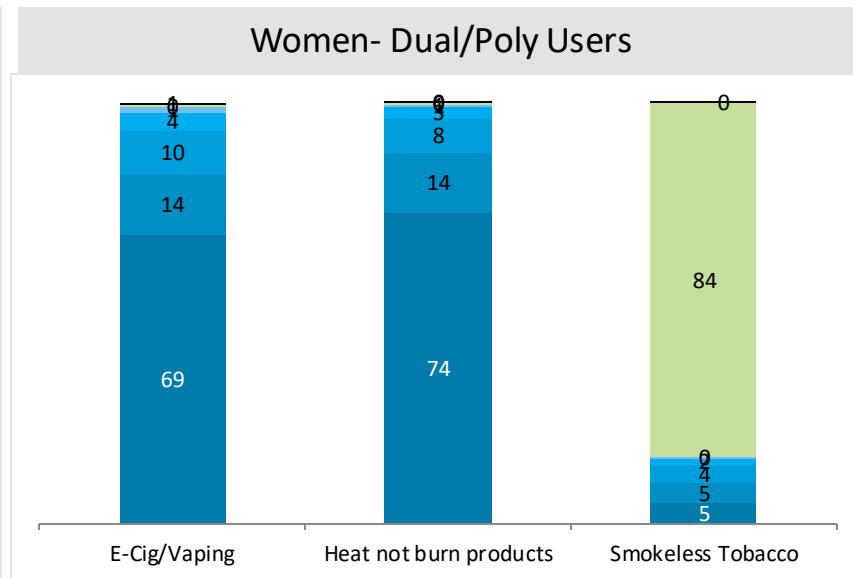
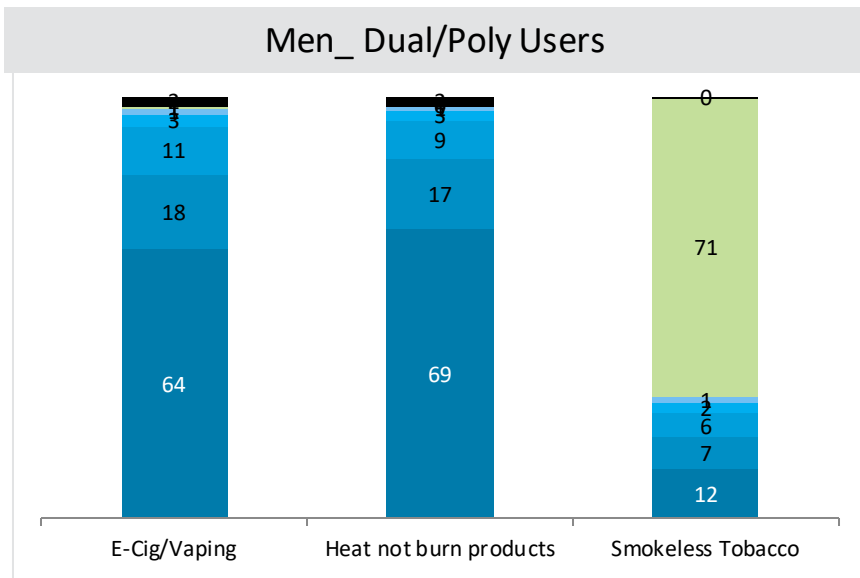
Usage and familiarity of E-Cig, Heat-not-burn and Smokeless tobacco products

Dual/ Poly Users

Both among men and women dual/poly users, E-Cig and Heat-not-burn products have barely any familiarity.

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



in %

om + Booster Sample, Current Users_ Dual/ Poly users Men : n= 7384 Women : n=362

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.*

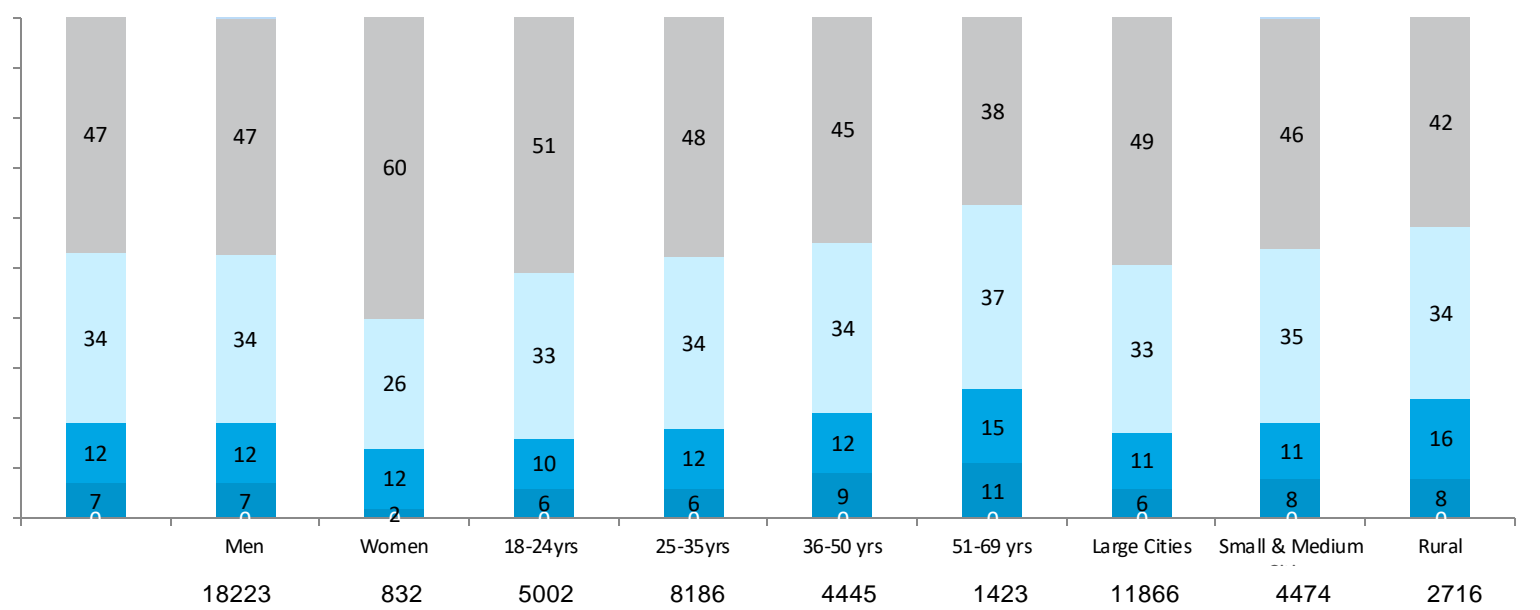
How to calculate Fagerstrom score**

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 low among current users of Bidis and Dual/Poly Users.

Indicative nicotine dependency among current smokers of various tobacco/other products..

	Current users of ...		
	Cigarettes	Bidis	Dual/Poly
	%	%	%
Base : Current Users	13711	2589	6772
C.10 How soon after you wake up do you smoke your first cigarette/consume your first nicotine product?			
Within 5 minutes (3)	8	20	15
6-30 minutes(2)	15	23	19
31-60 minutes(1)	21	21	20
C11. Find it difficult to refrain from smoking/consuming tobacco in places where it is forbidden (1)	51	42	54
C12. Hate to give up the first one in the morning (1)	56	48	55
C14. Consume more frequently during the first hour (1)	42	46	47
C15. Consume even if you are ill (1)	31	35	31
Average Scores (1-7)	2.6	3.0	2.9

*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.

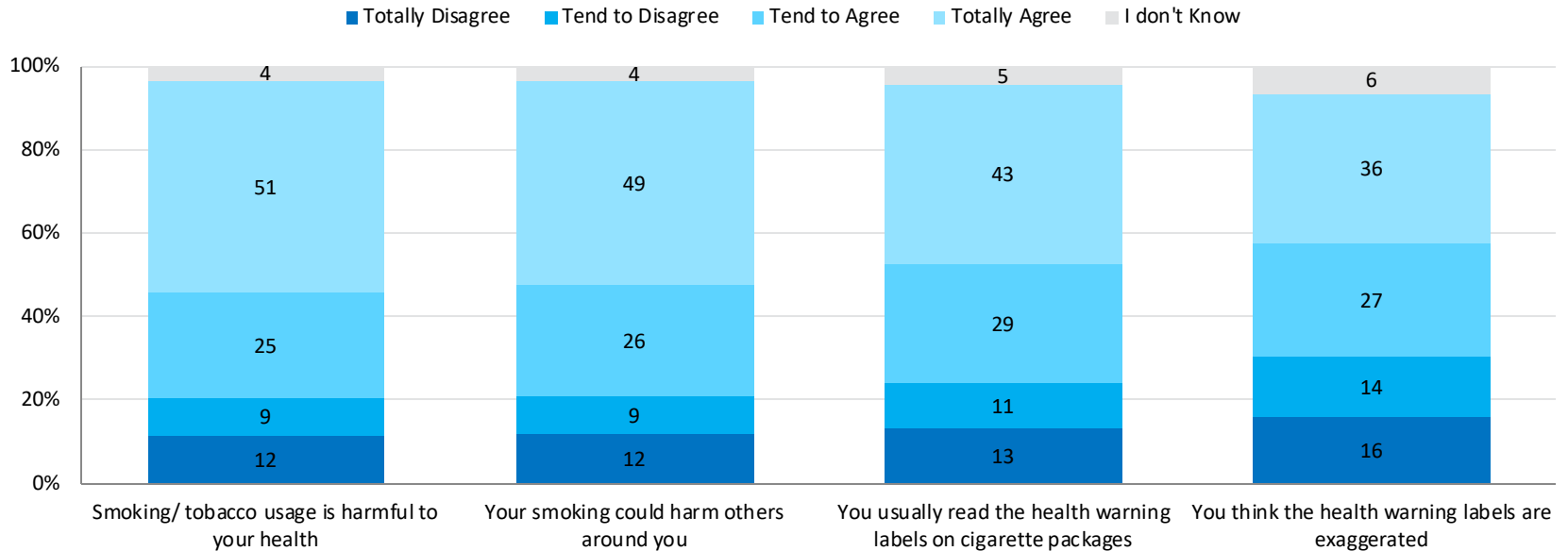
4.2 Beliefs and Perception : Among Current Users of Tobacco Products

Beliefs and perceptions about smoking- Current users of Tobacco Products

Smoke only Combustible Tobacco Products apart from Bidis

76% of the smokers of Combustible Tobacco Products agree that tobacco usage is harmful, and 75% opined that smoking could harm others smokers too.

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



Beliefs and perceptions about smoking- Current users of Tobacco Products

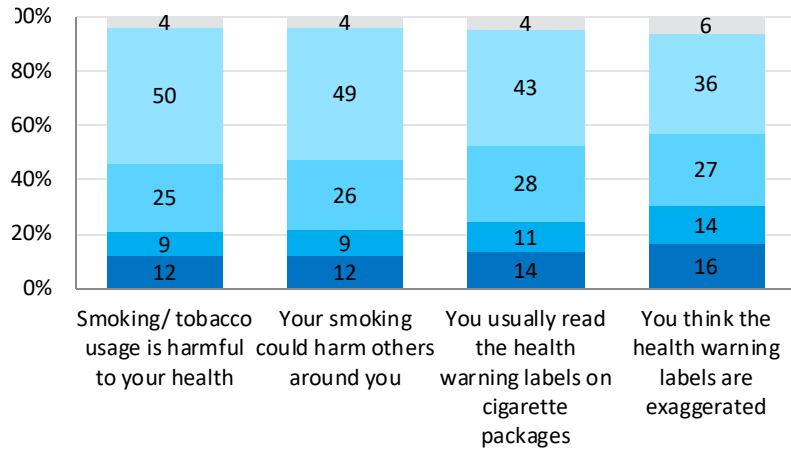
Smoke only Combustible Tobacco Products apart from Bidis

Among both men and women, the majority of smokers of Combustible Tobacco Products believe health warning labels are exaggerated.

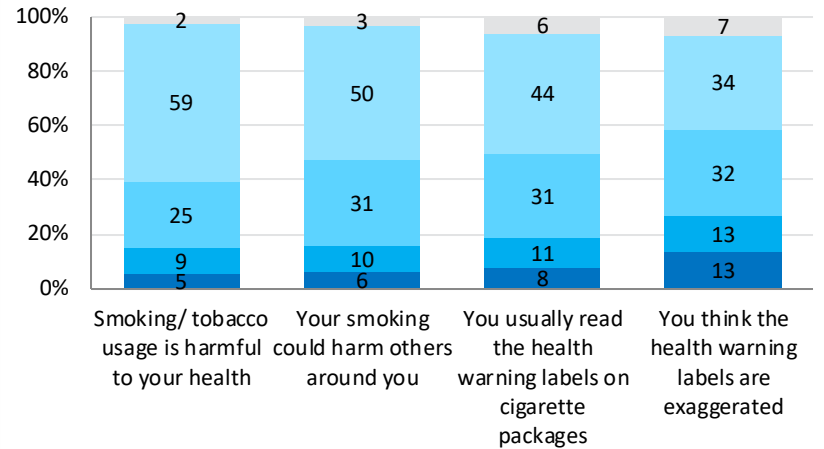
B1.Please rate to what extent do you agree with the following statements?

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

Men_ Smoke only Combustible Tobacco Products apart from Bidis



Women__ Smoke only Combustible Tobacco Products apart from Bidis



figures are in %

base : Random+ Booster Sample, Current smokers of combustible Tobacco Products (apart from Bidis)

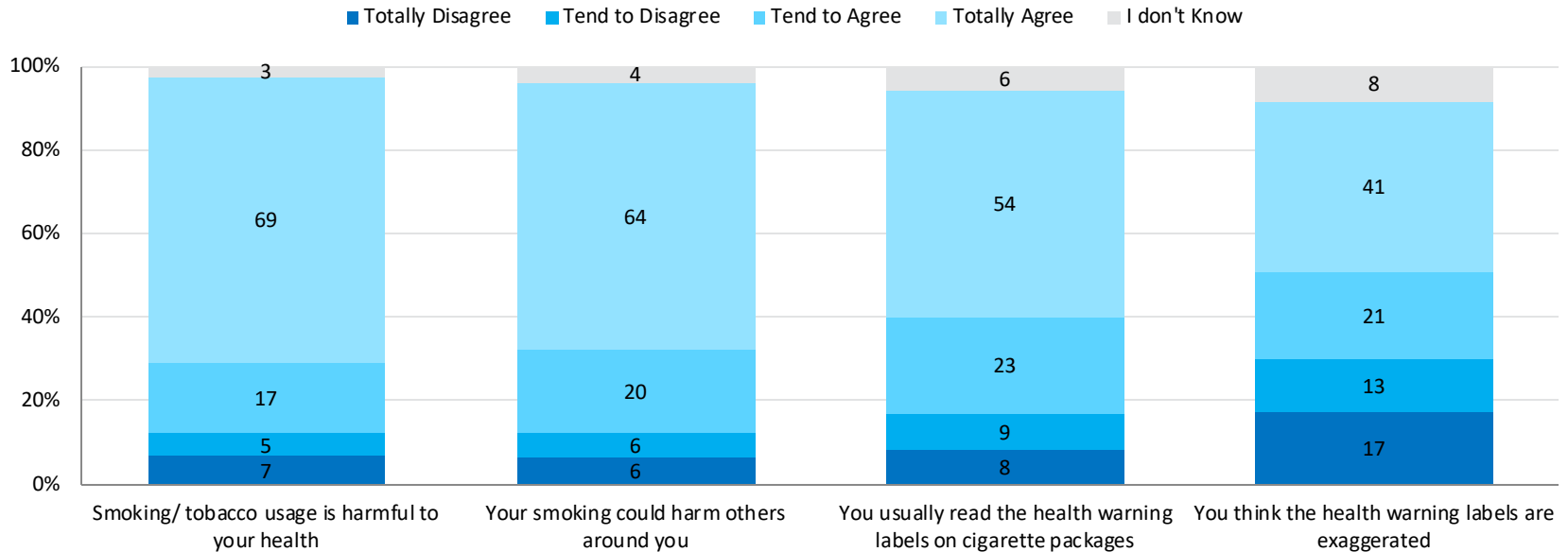
Men : n= 12889 Women : n=822

Beliefs and perceptions about smoking- Current users of Tobacco Products

Smoke only Bidis

86% of the Solus smokers of Bidis agree that tobacco is harmful, and 84% of them think smoking could harm others around the smokers too.

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



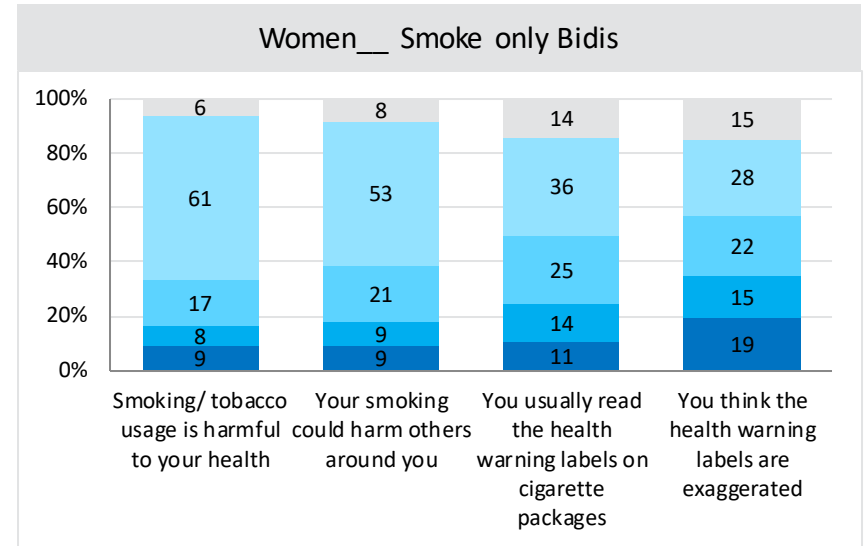
Beliefs and perceptions about smoking- Current users of Tobacco Products

Smoke only Bidis

Among both men and women, the majority of solus smokes of Bidis believe that smoking is harmful.

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 %

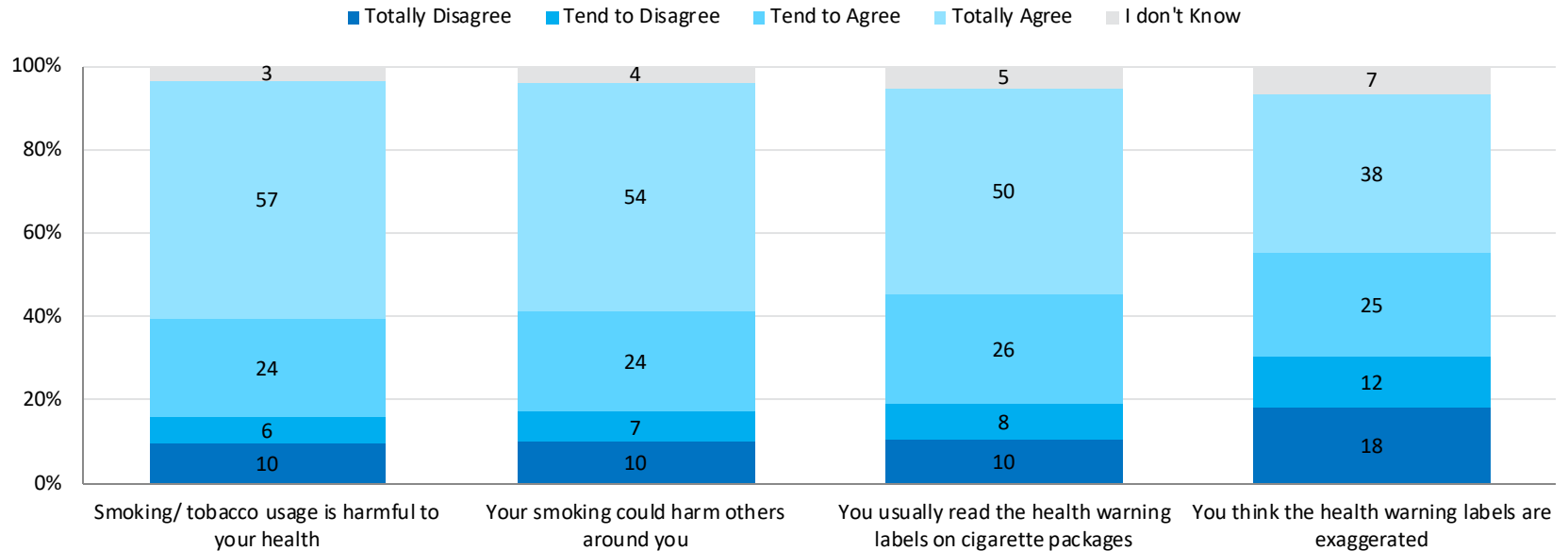
base : Random+ BoosterSample, Current Users_ Smoke only Bidis Men : n=2392 Women : n=197

Beliefs and perceptions about smoking- Current users of Tobacco Products

Use only Smokeless Tobacco Products

81% of the solus users of Smokeless Tobacco Products agree that tobacco is harmful, and 78% of them think tobacco usage could harm others around the users too.

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



Beliefs and perceptions about smoking- Current users of Tobacco Products

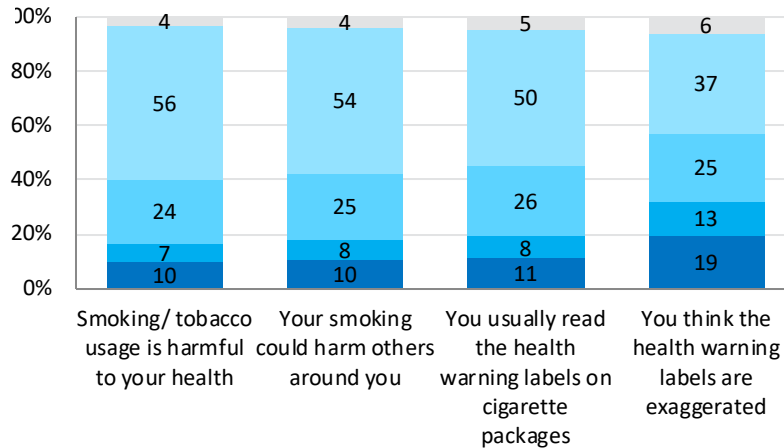
Use only Smokeless Tobacco Products

Among both men and women, the majority of solus users of Smokeless Tobacco Products agree that tobacco usage is harmful.

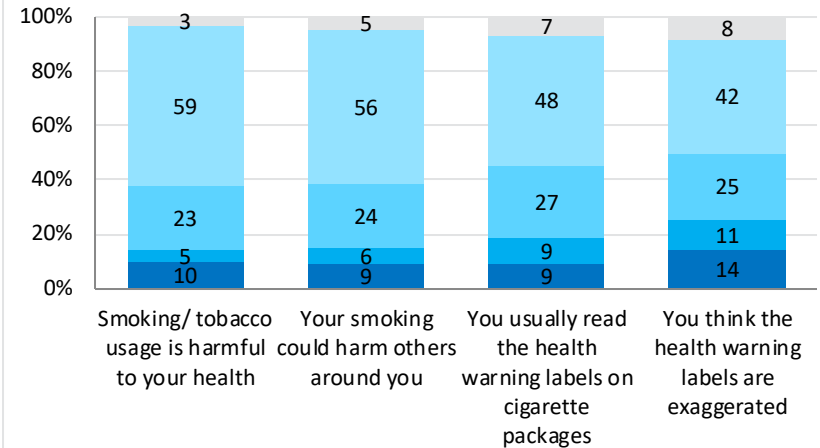
B1.Please rate to what extent do you agree with the following statements?

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

Men_ Use only Smokeless tobacco



Women__ Use only Smokeless tobacco



figures are in %

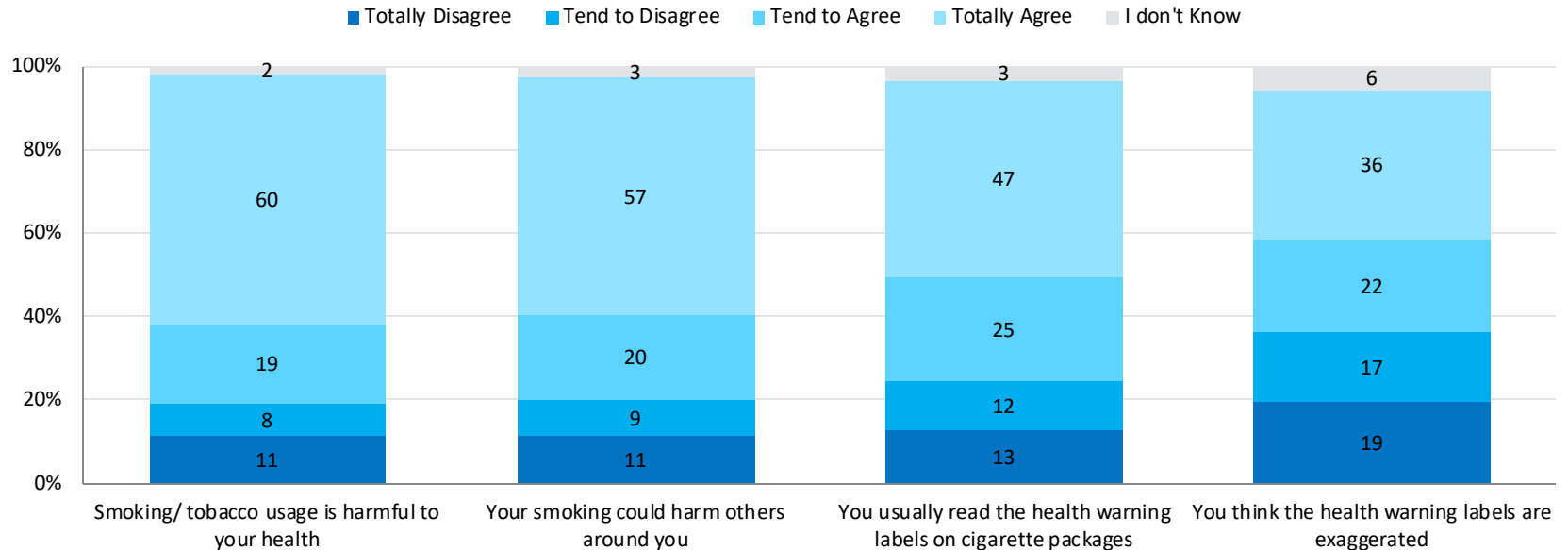
base : Random+ Booster Sample, Current Users_ Use only Smokeless Tobacco products Men : n=8165 Women : n=2801

Beliefs and perceptions about smoking- Current users of Tobacco Products

Dual / Poly users

79% of the Dual/ Poly users agree that tobacco usage is harmful, and 77% of them think smoking could harm others around the smokers too.

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



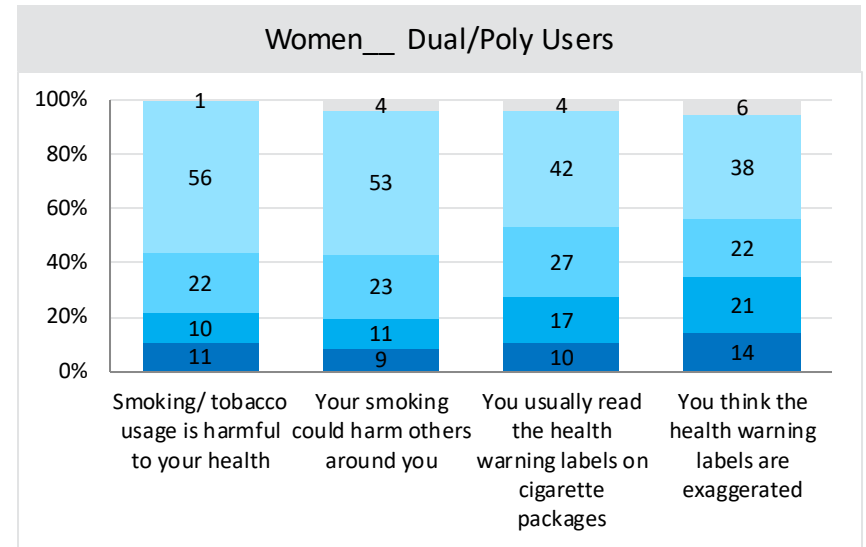
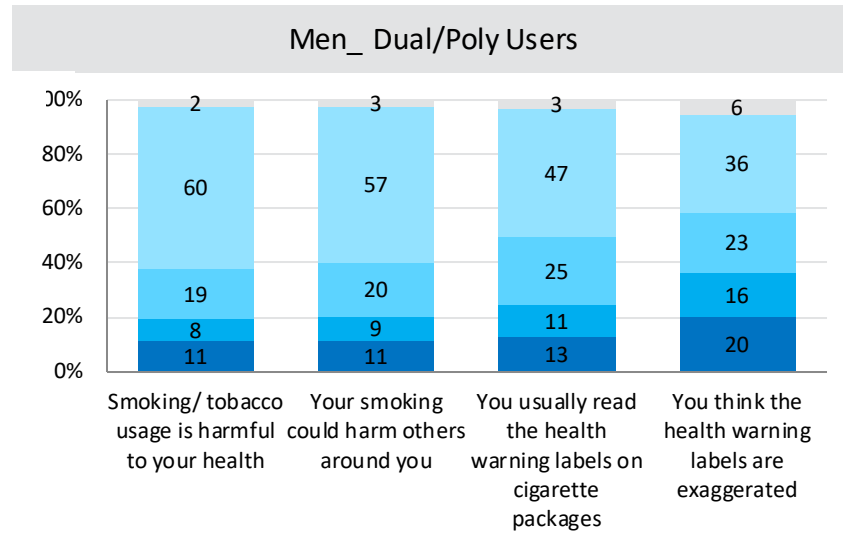
Beliefs and perceptions about smoking- Current users of Tobacco Products

Dual / Poly users

Among both men and women, the majority of users of tobacco products/ other products claimed that they usually read the health warning labels on cigarette packages.

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



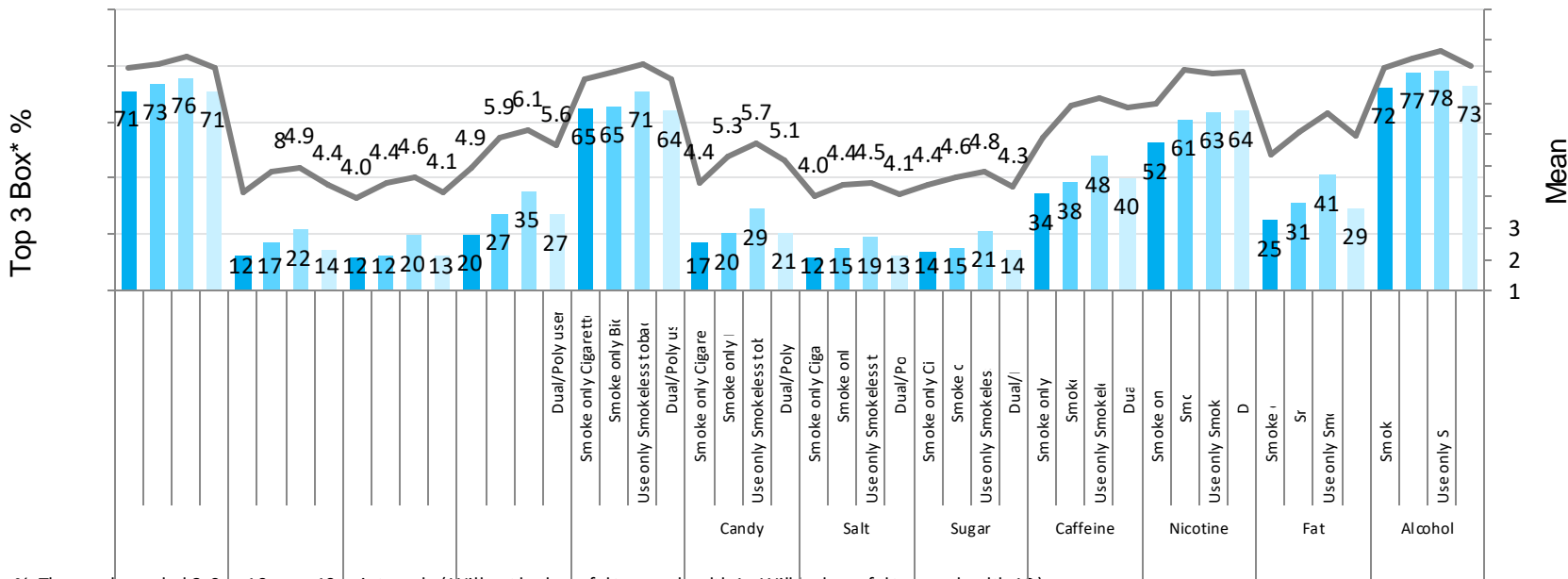
Figures are in %

base : Random+ Booster Sample, Current Users_ Dual/ poly users of tobacco products Men : n=7384 Women : n=362

Risk perception comparison among various products

Current users of Tobacco Products consider Alcohol, Nicotine and Cigarettes to be the more harmful products than others.

B3. On a scale from 1 to 10, to what extent do you think a moderate daily use of the following products or substances can harm your health?

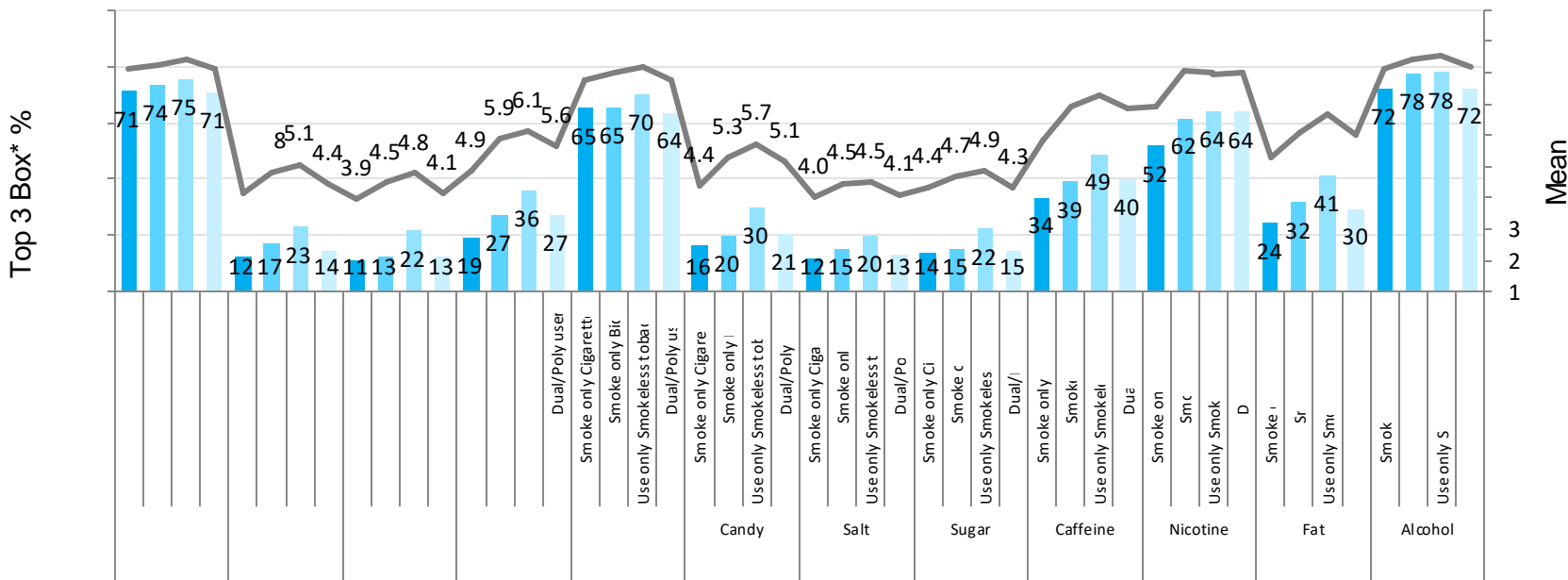


*Top 3 Box %: Those who coded 8, 9 or 10 on a 10 points scale (Will not be harmful to your health 1 - Will be harmful to your health 10)

Risk perception comparison among various products

Cigarettes rated as more harmful than Nicotine among Men current users of Tobacco Products.

B3. On a scale from 1 to 10, to what extent do you think a moderate daily use of the following products or substances can harm your health?

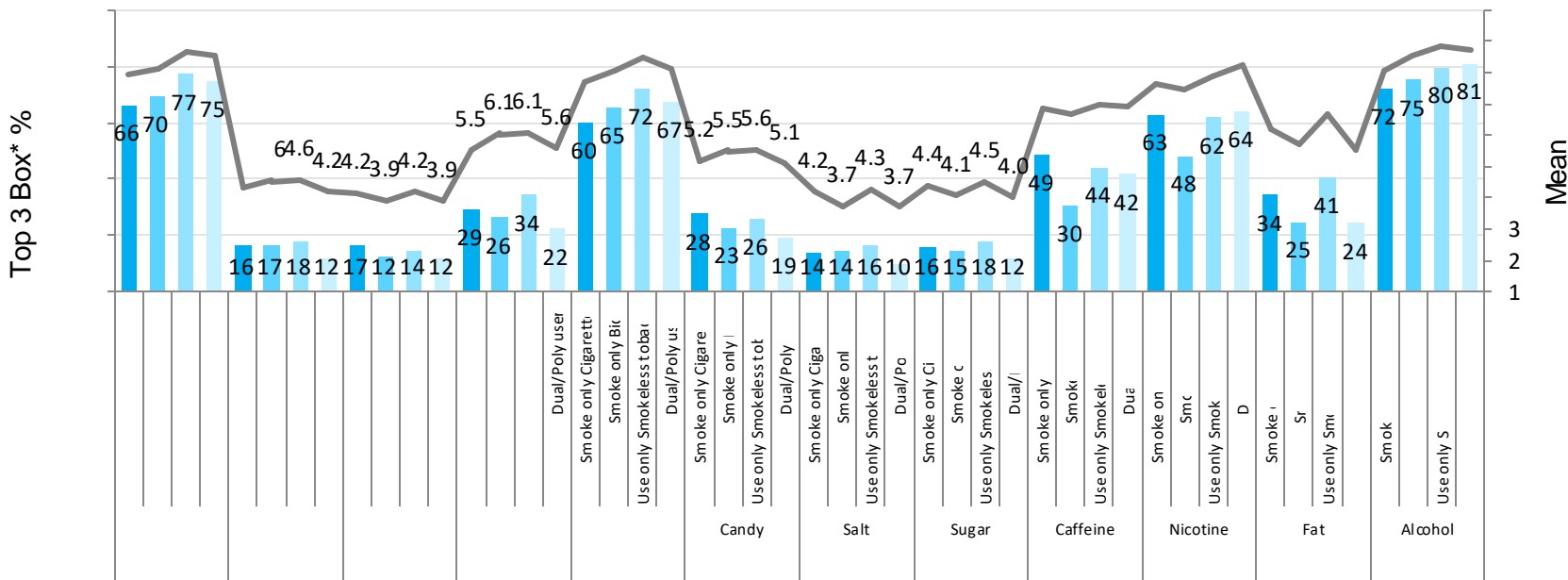


*Top 3 Box %: Those who coded 8, 9 or 10 on a 10 points scale (Will not be harmful to your health 1 - Will be harmful to your health 10)

Risk perception comparison among various products

Cigarettes rated more harmful than Nicotine among Women current users of Tobacco Products too.

B3. On a scale from 1 to 10, to what extent do you think a moderate daily use of the following products or substances can harm your health?



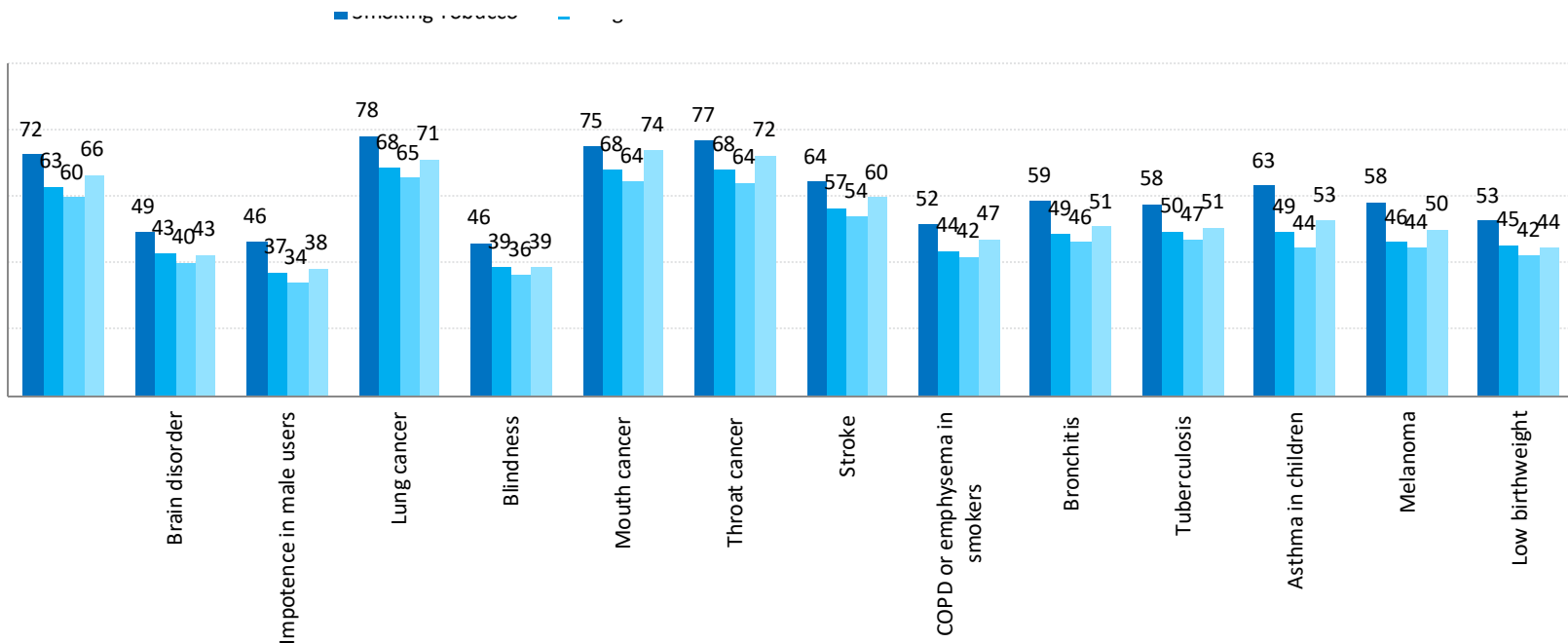
*Top 3 Box %: Those who coded 8, 9 or 10 on a 10 points scale (Will not be harmful to your health 1- Will be harmful to your health 10)

Risk perception comparison among various tobacco and other products

Smoke only Combustible Tobacco Products apart from Bidis

E-Cig/Vapes and Heat-not-burn products have the lower risk perception of causing diseases among solus smokers of Combustible Tobacco Products.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)



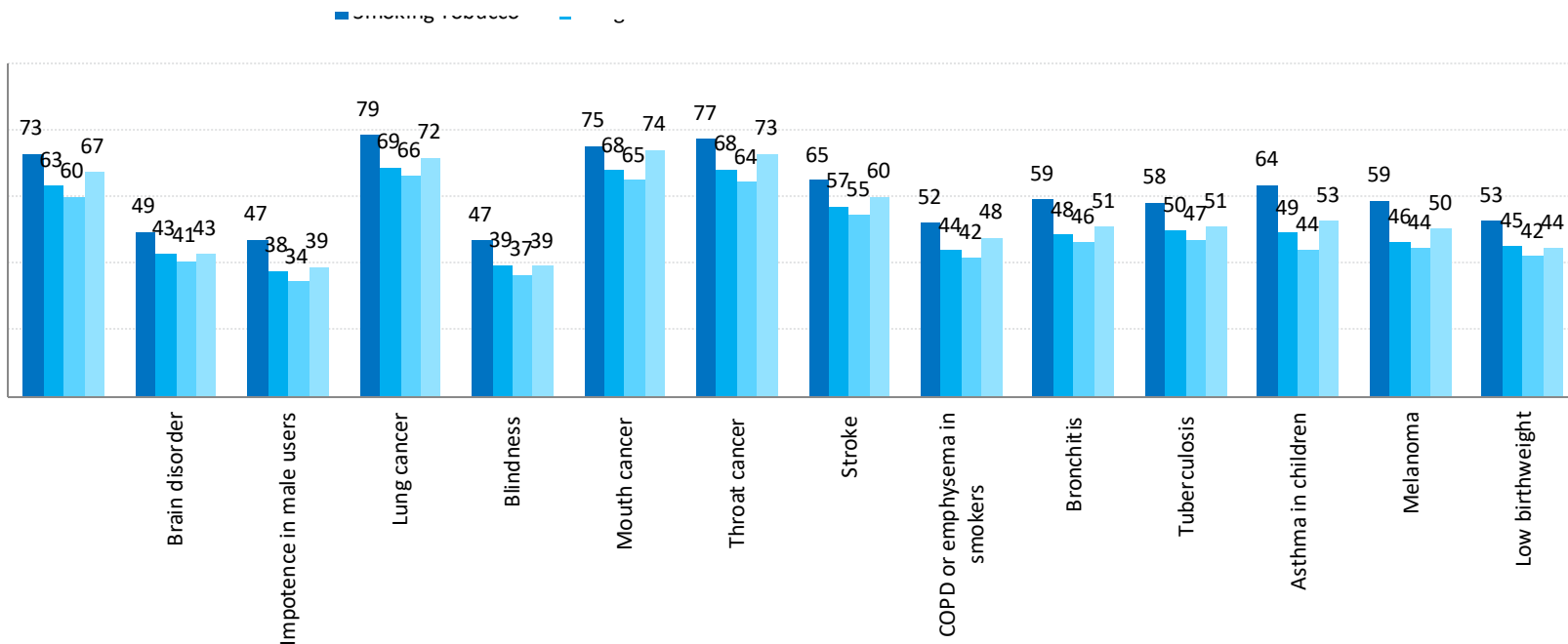
smokers of combustible Tobacco Products (apart from Bidis) : n= 13711

Risk perception comparison among various tobacco and other products

Smoke only Combustible Tobacco Products apart from Bidis

E-Cig/Vapes and Heat-not-burn products have the lower risk perception of causing diseases among Men solus smokers of Combustible Tobacco Products.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)



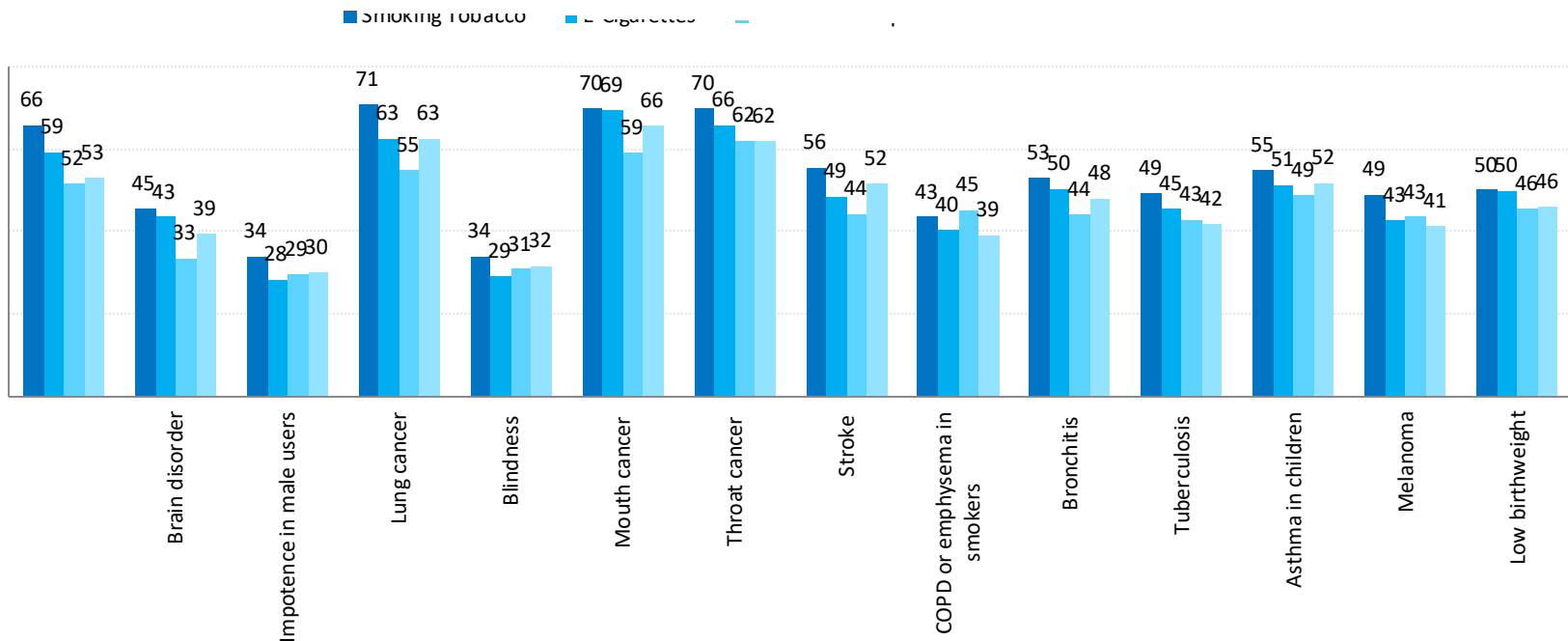
smokers of combustible Tobacco Products (apart from Bidis) Men n= 12889

Risk perception comparison among various tobacco and other products

Smoke only Combustible Tobacco Products apart from Bidis

E-Cig/Vapes and Heat-not-burn products have the lower risk perception of causing diseases among Women solus smokers of Combustible Tobacco Products too.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)

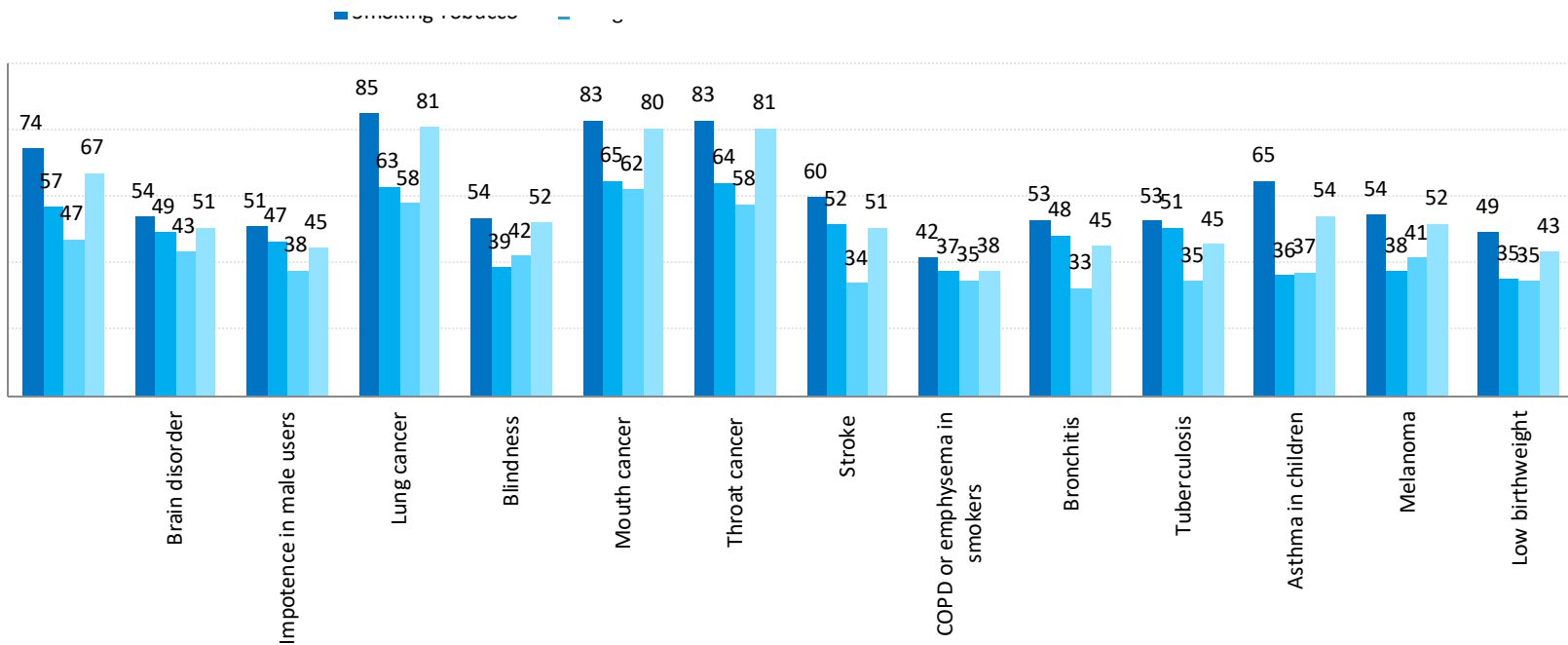


Risk perception comparison among various tobacco and other products

Smoke only Bidis

Heat-not-burn products have the lowest risk perception of causing diseases among solus smokers of Bidis.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)

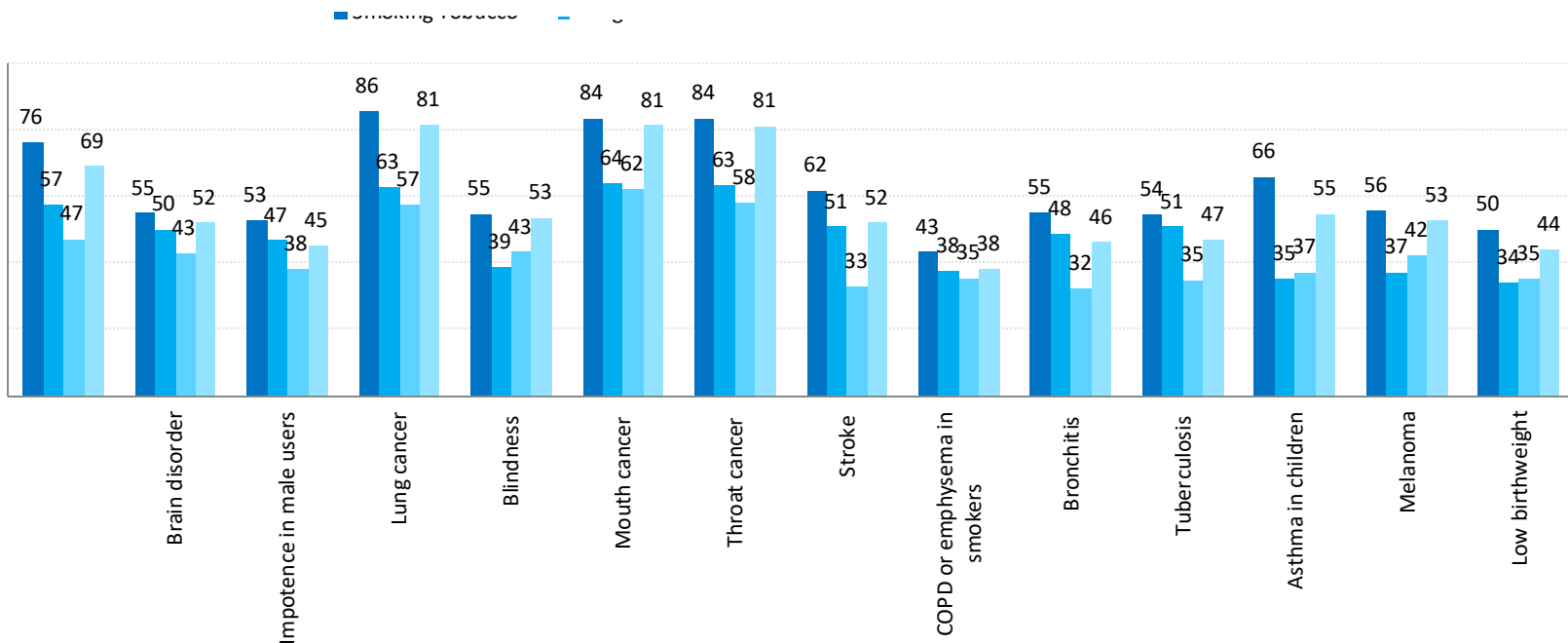


Risk perception comparison among various tobacco and other products

Smoke only Bidis

Heat-not-burn products have the lowest risk perception of causing diseases among men solus smokers of Bidis.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)

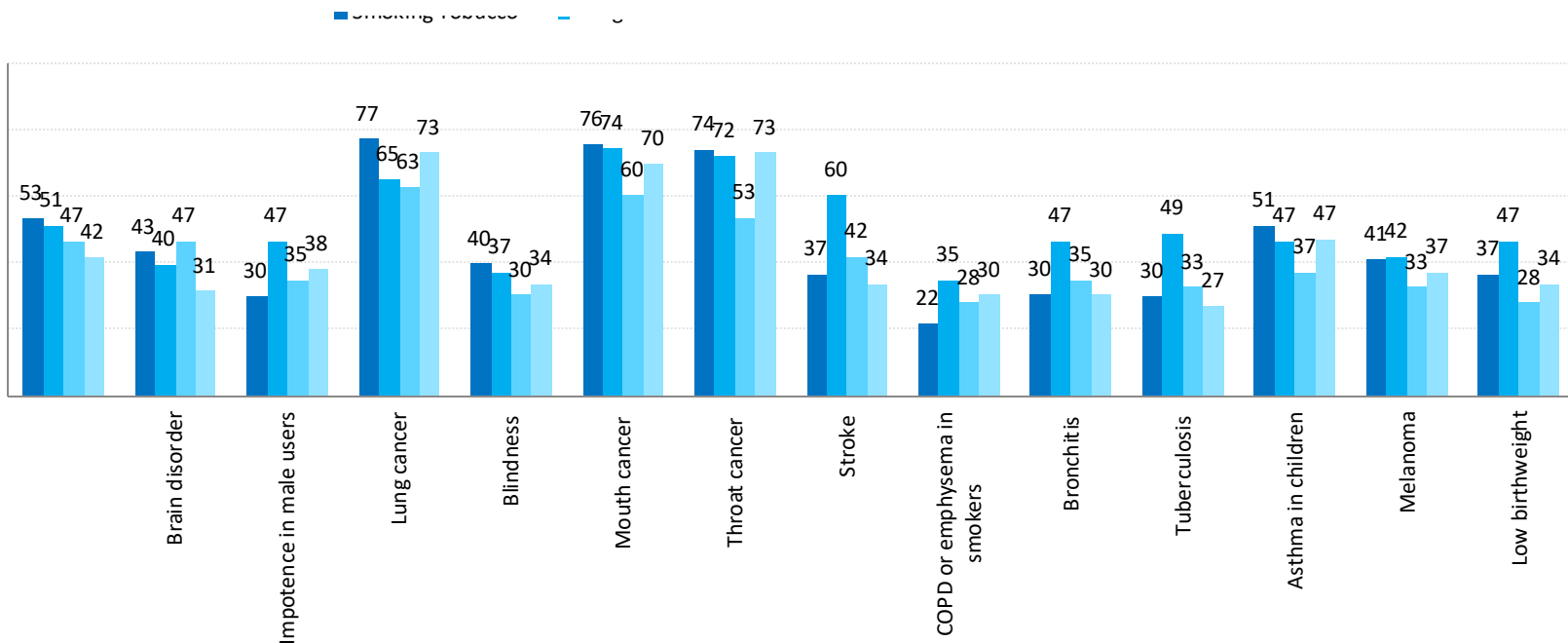


Risk perception comparison among various tobacco and other products

Smoke only Bidis

Heat-not-burn products have the lowest risk perception of causing diseases among women solus smokers of Bidis.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)

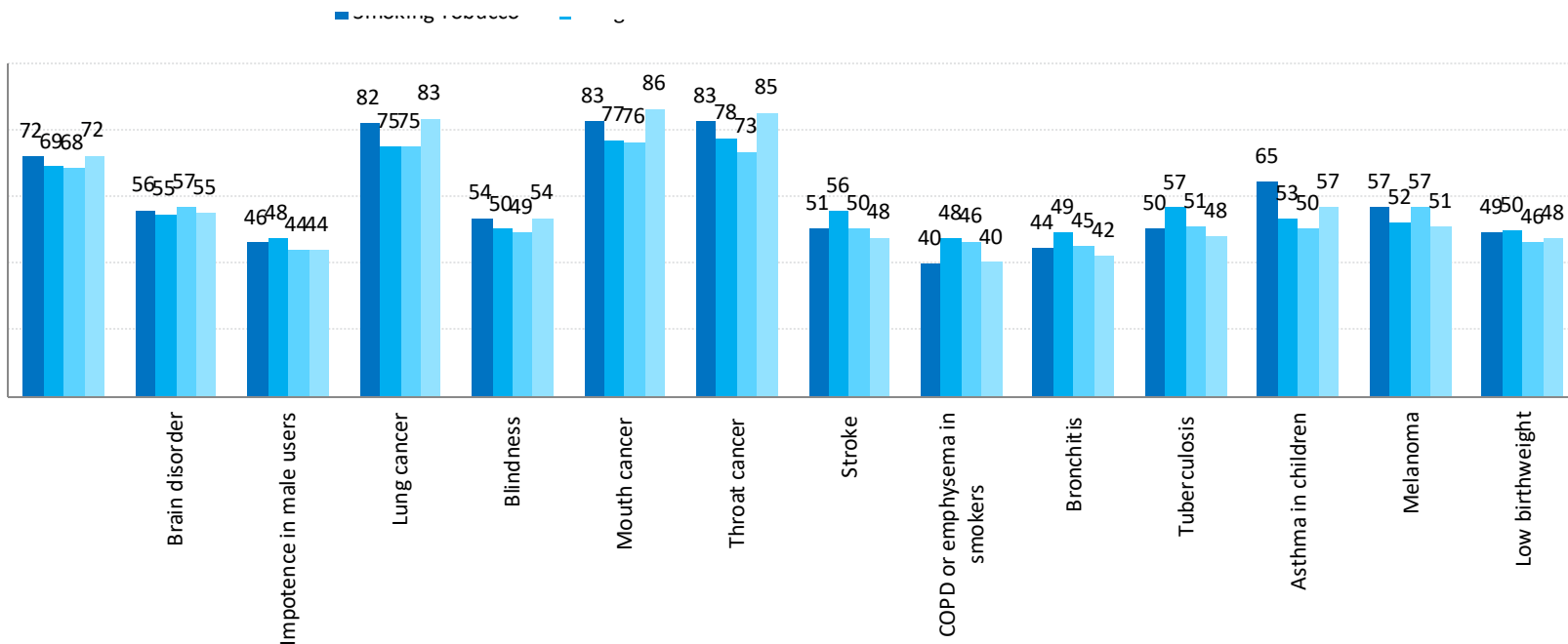


Risk perception comparison among various tobacco and other products

Use only Smokeless Tobacco Products

Solus users of Smokeless Tobacco Products are opining that their products have similar risk perception like smoking tobacco.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)

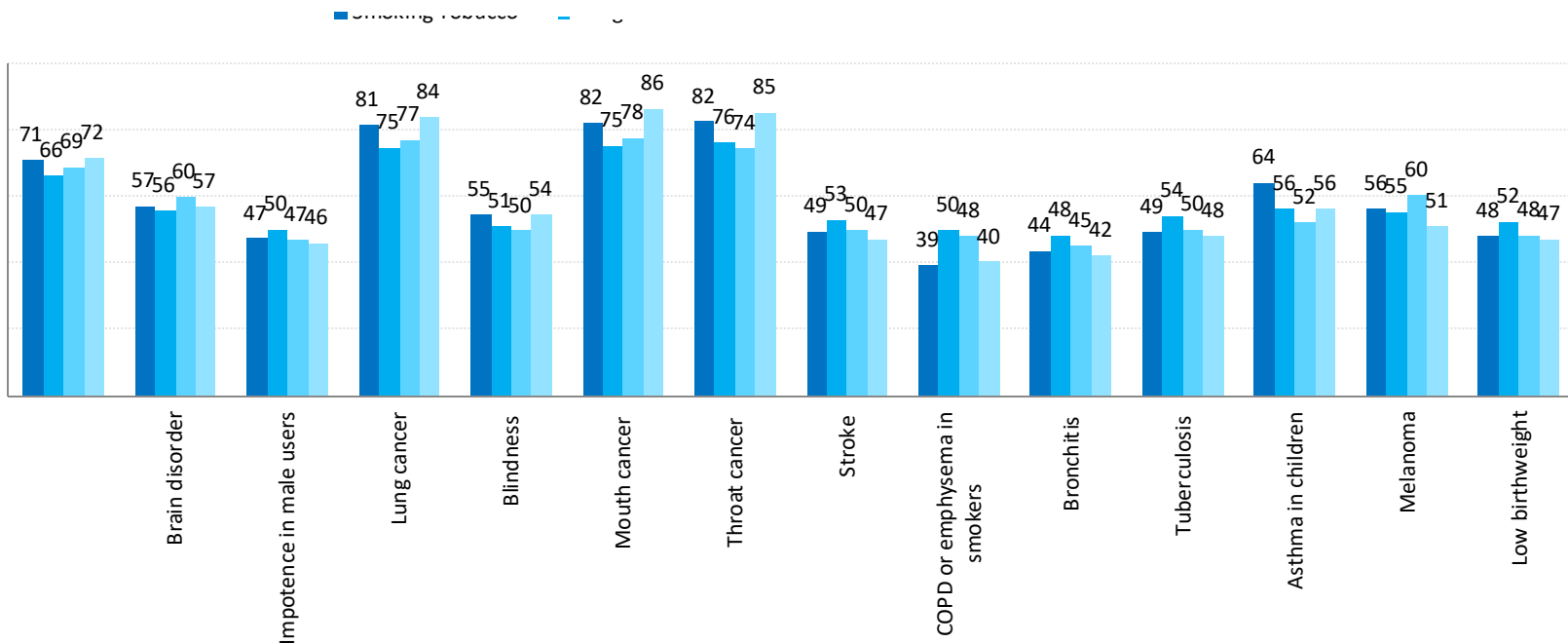


Risk perception comparison among various tobacco and other products

Use only Smokeless Tobacco Products

Men solus users of Smokeless Tobacco Products are opining that their products have similar risk perception like smoking tobacco.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)



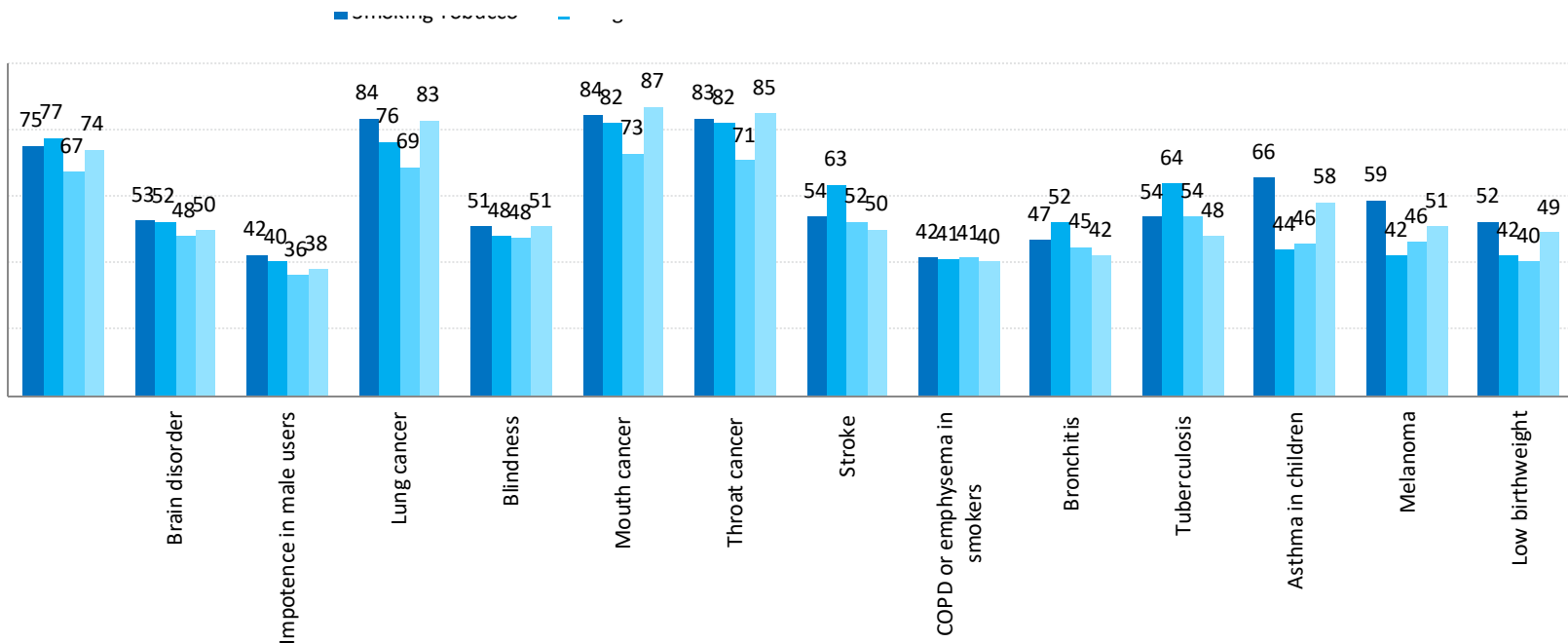
sers _ Use only Smokeless Tobacco products _ Men : n= 8165

Risk perception comparison among various tobacco and other products

Use only Smokeless Tobacco Products

Same scenario among Women solus users of Smokeless Tobacco products too.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)



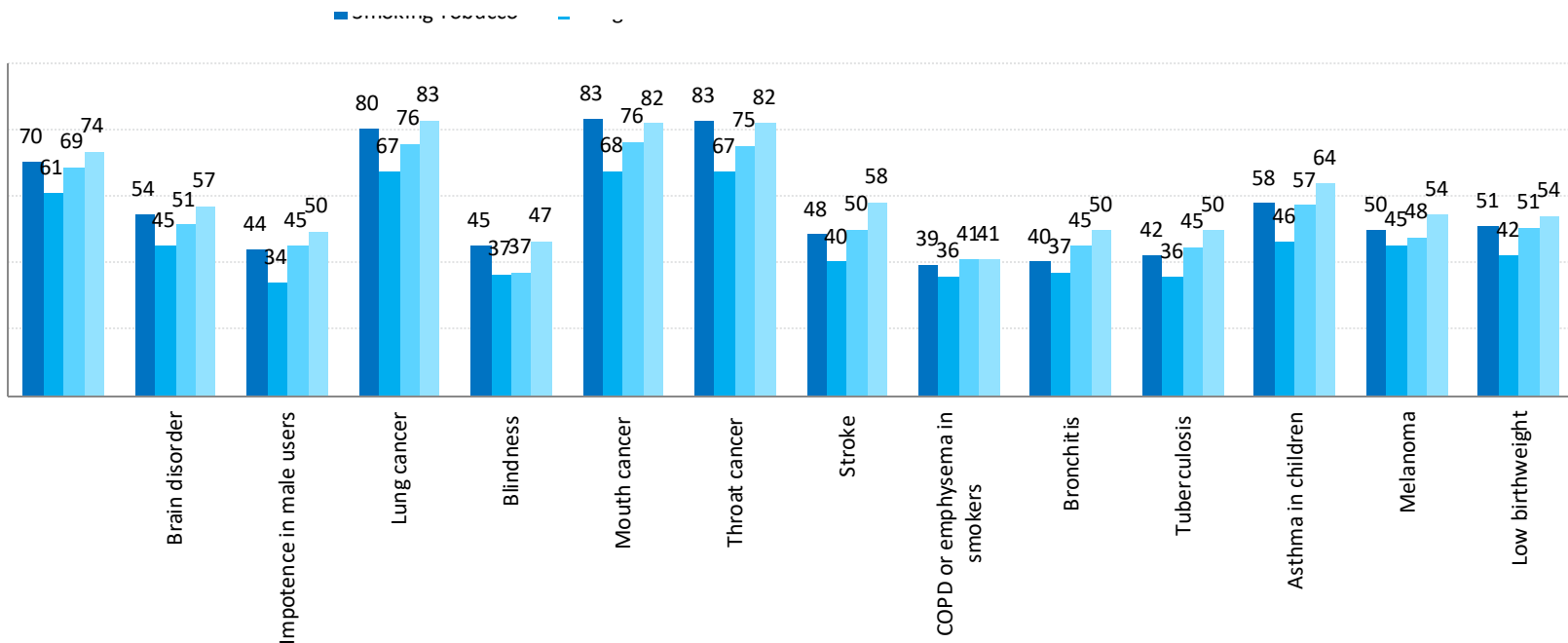
sers _ Use only Smokeless Tobacco products _ Women : n= 2801

Risk perception comparison among various tobacco and other products

Dual/ Poly Users

E-Cigarettes/Vapes and Heat-not-burn have the lower risk perception of causing diseases among Dual/Poly users.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)



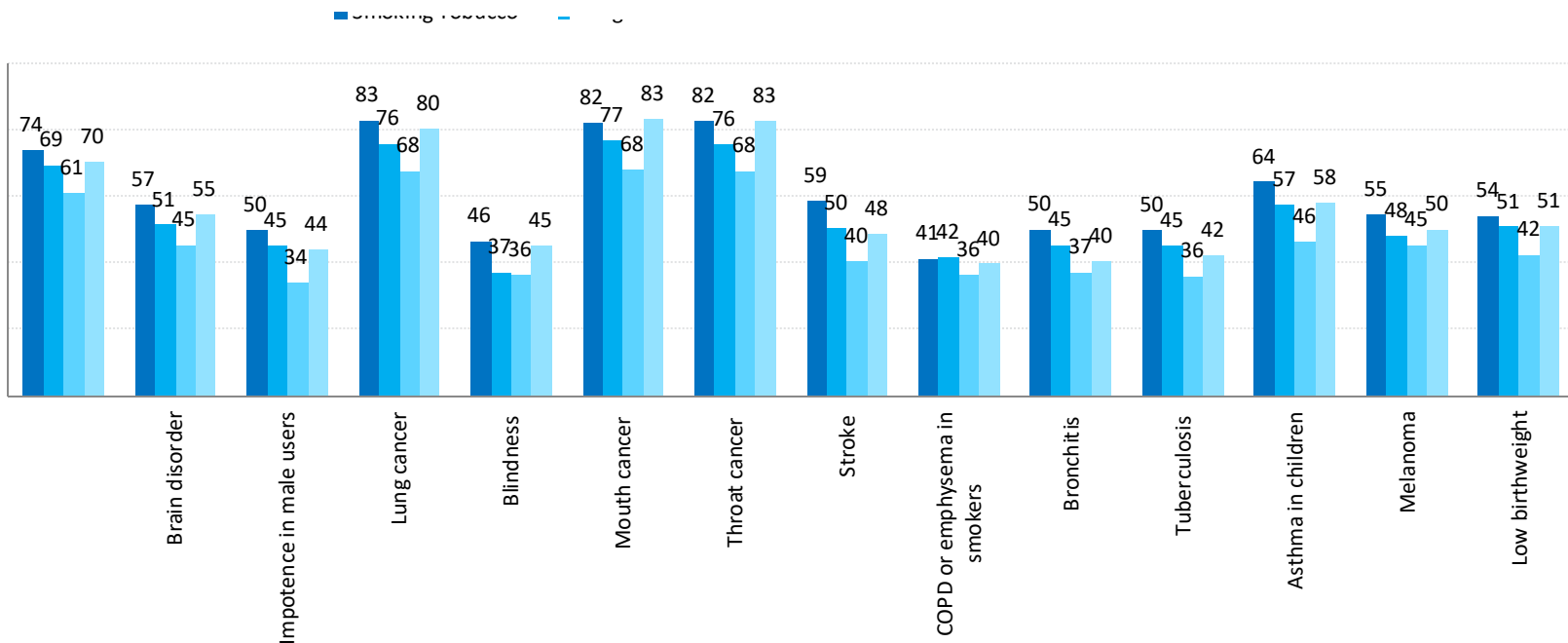
ual/ Poly users of tobacco products/ other products : n= 7748

Risk perception comparison among various tobacco and other products

Dual/ Poly Users

Smoking Tobacco and Smokeless Tobacco have the higher risk perception of causing diseases among men Dual/Poly users.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)

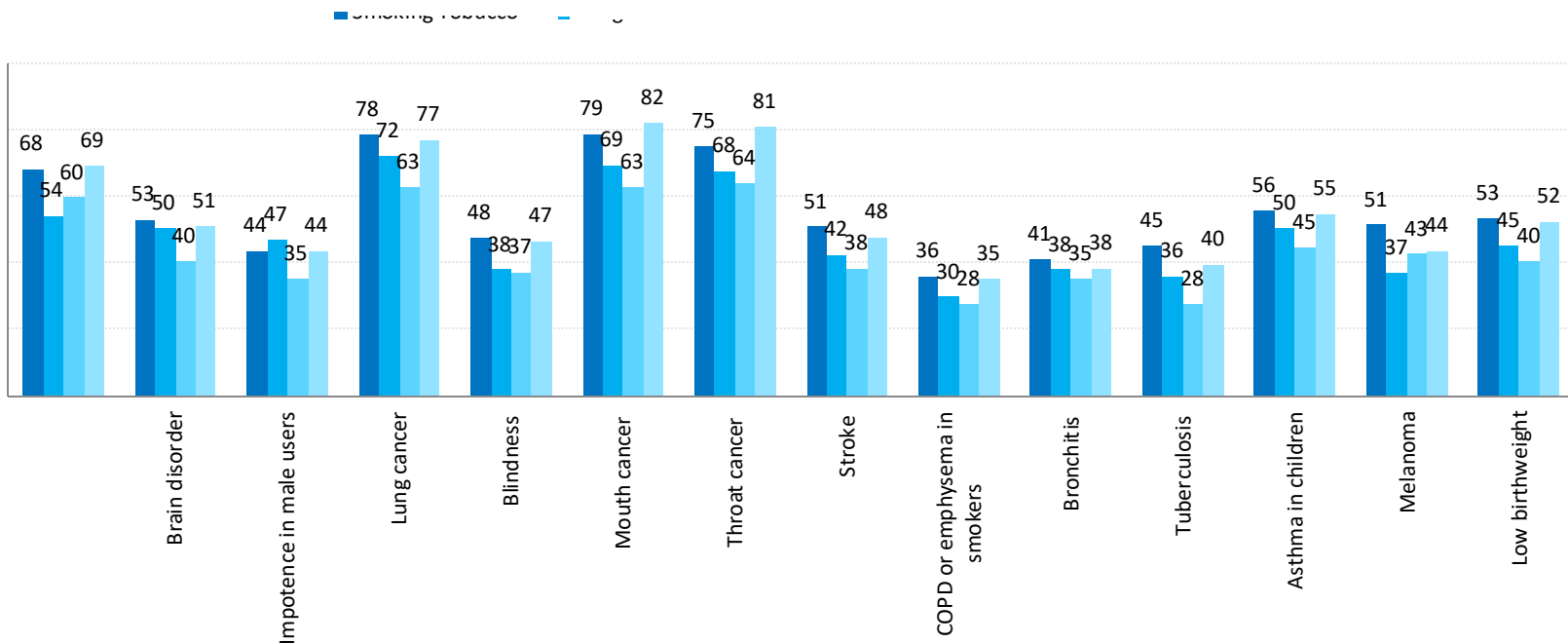


Risk perception comparison among various tobacco and other products

Dual/ Poly Users

E-Cigarettes/Vapes and Heat-not-burn have the lower risk perception of causing diseases among women Dual/Poly users.

B2/5/9/105. Based on what you know or believe, do you think smoking tobacco causes... (Yes%)



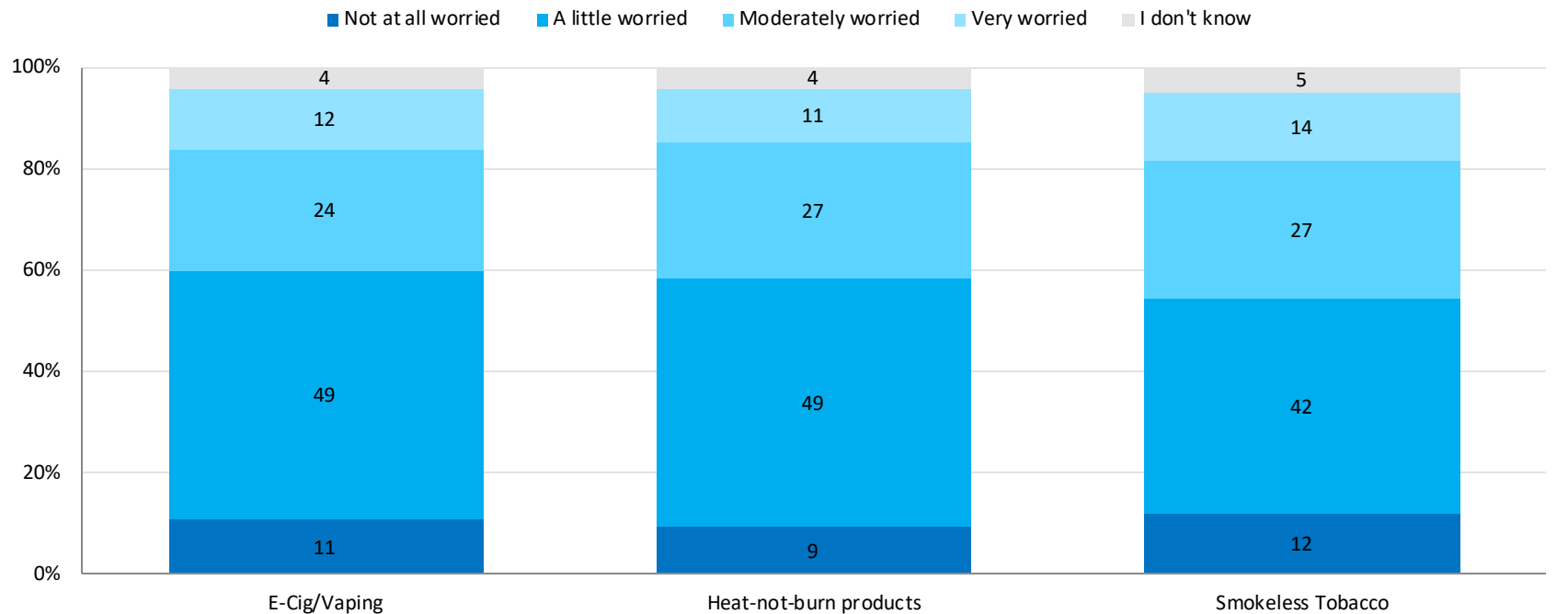
ual/ Poly users of tobacco products/ other products _Women: n= 362

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

Smoke only Combustible Tobacco Products apart from Bidis

61% of the Solus smokers of Combustible Tobacco Products (apart from Bidis) who are aware of E-Cig/Vaping are not worried/very little 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?



%

1+ Booster Sample, Current smokers of combustible Tobacco Products (apart from Bidis) and aware of respective products
02; Heat-not-burn products n: 5941 Smokeless tobacco n: 8905

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

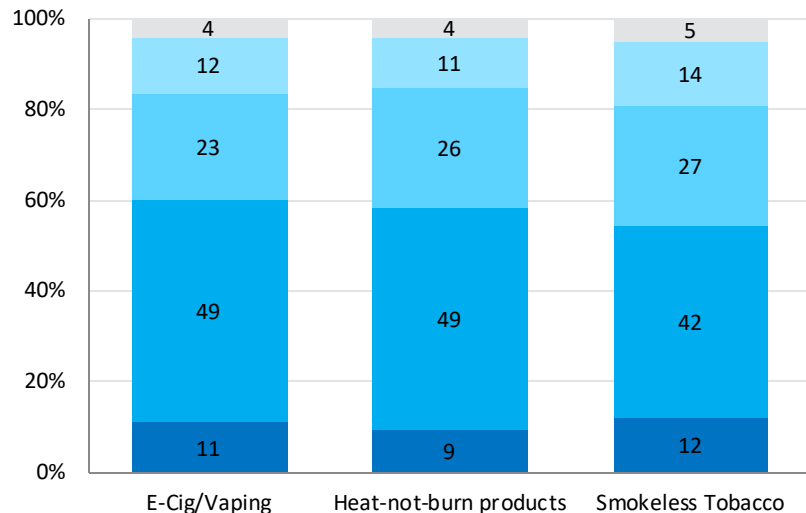
Smoke only Combustible Tobacco Products apart from Bidis

Among both men and women, around 60% Solus smokers of Combustible Tobacco Product (apart from Bidis) are not worried/very little worried about the damage Heat-not-burn products will cause to their health.

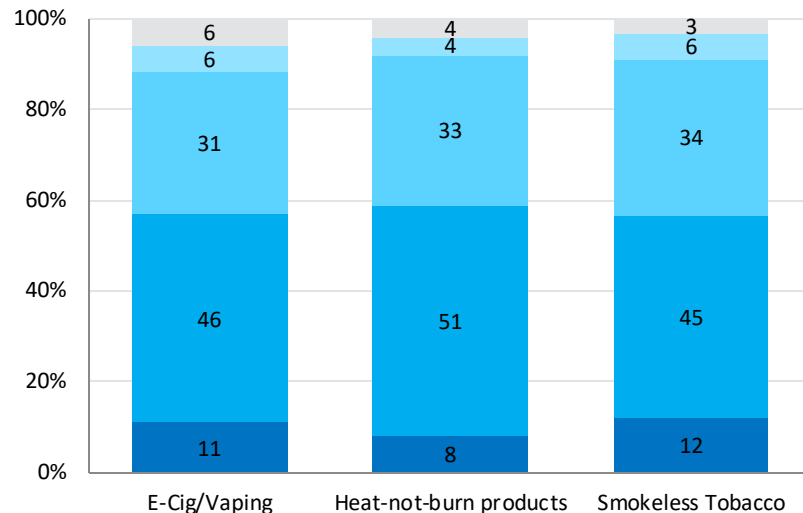
B4/8.5/10.2. How worried are you that using this product will damage your health in the future?

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

Men_ Smoke only Combustible Tobacco Products apart from Bidis



Women_ Smoke only Combustible Tobacco Products apart from Bidis



Figures are in %

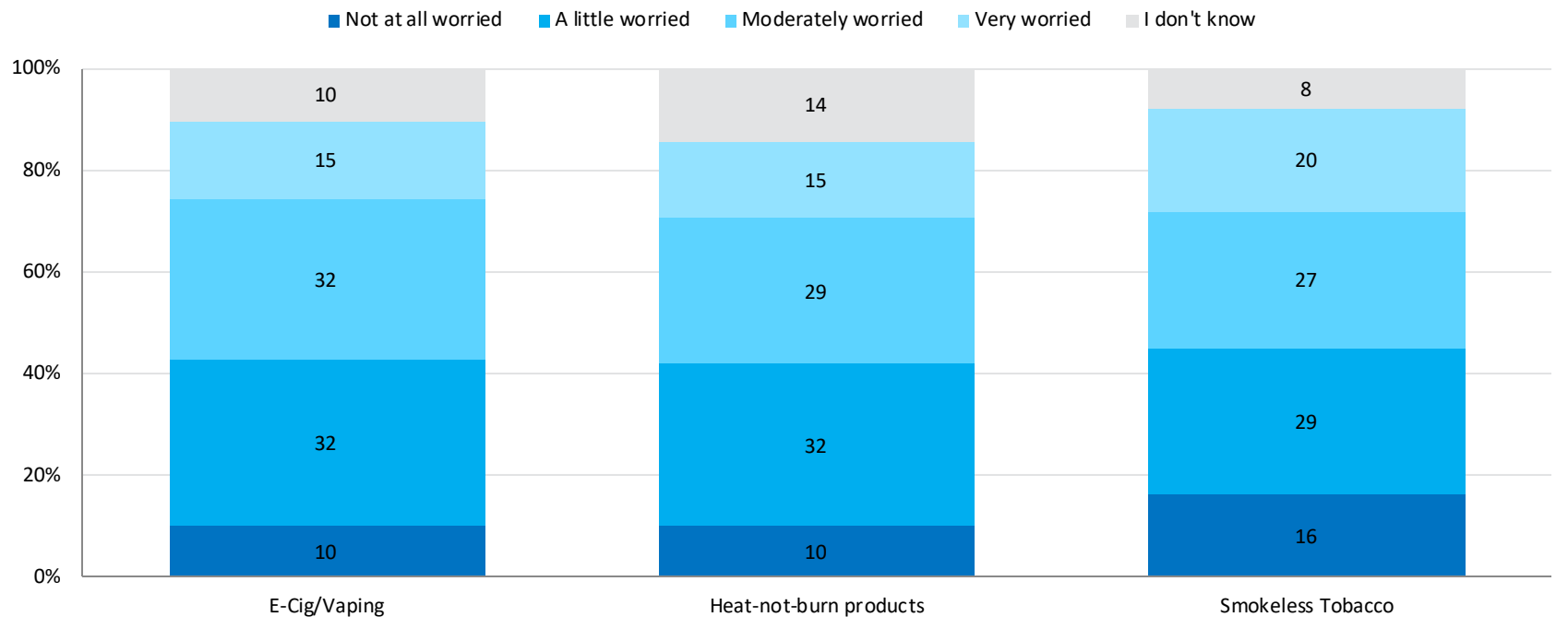
Base: Random + Booster Sample, Current smokers of combustible Tobacco Products (apart from Bidis) and aware of respective products
 E-Cig Men: n=6453 Women: n=449; Heat-not-burn products Men: n=5561 Women: n=380; Smokeless tobacco Men: n=8434; Women: n=471

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

Smoke only Bidis

47% Solus smokers of Bidis who are aware of E-Cig/Vape are moderately/very worried about the damage E-Cig/vape 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?



%

†+ Booster Sample, Current Users _ Smoke only Bidis Those who are aware of the respective products :
; Heat-not-burn products n: 495; Smokeless tobacco n : 1278

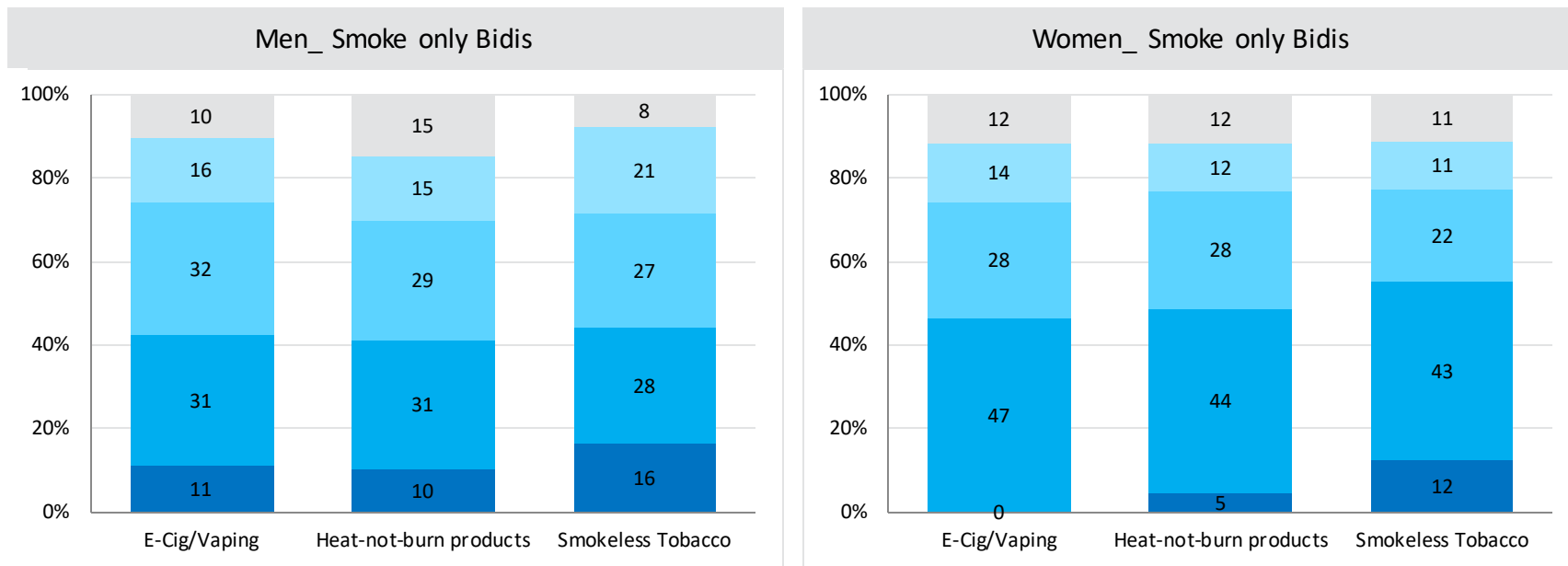
Beliefs and perceptions comparison among E-Cig, HNB and Smokeless tobacco

Smoke only Bidis

44% Men solus smokers of Bidis who are aware of Heat-not-burn products are moderately/very worried about the damage these 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 + Booster Sample, Current Users_Smoke only Bidis Those who are aware of the respective products:

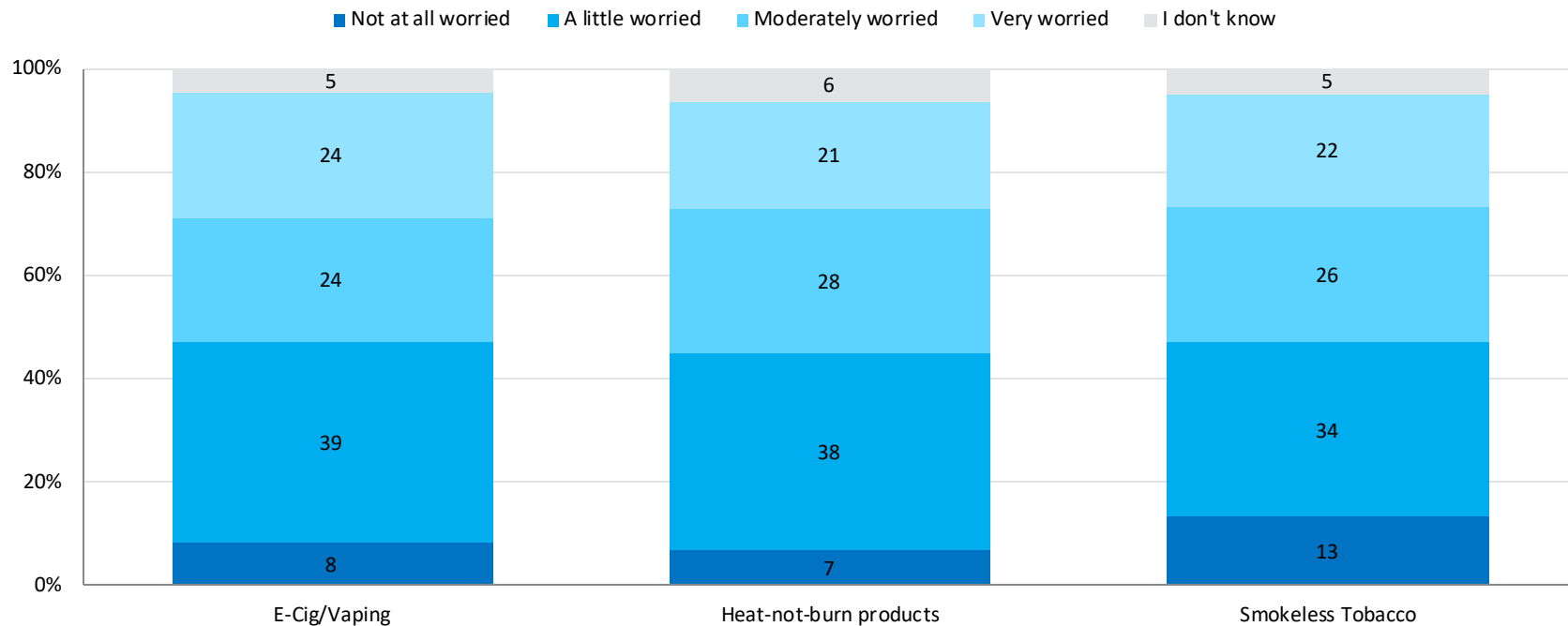
— Cig Men: n=431 Women: n=43; Heat-not-burn products Men: n=452 Women: n=43; Smokeless tobacco Men: n=1189; Women: n=89

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

Use only Smokeless Tobacco

47% of the Solus user of Smokeless Tobacco Products who are aware of E-Cig/Vaping are not worried/very little 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?



%

1+ Booster Sample, Current Users_ Use only Smokeless Tobacco products_ Those who are aware of the respective products

58 Heat-not-burn products n: 2137; Smokeless tobacco n: 10966

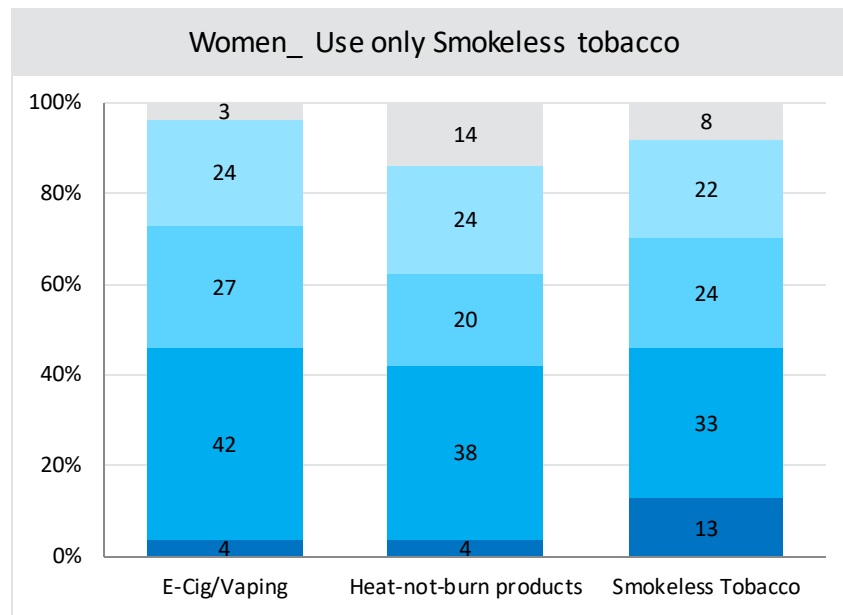
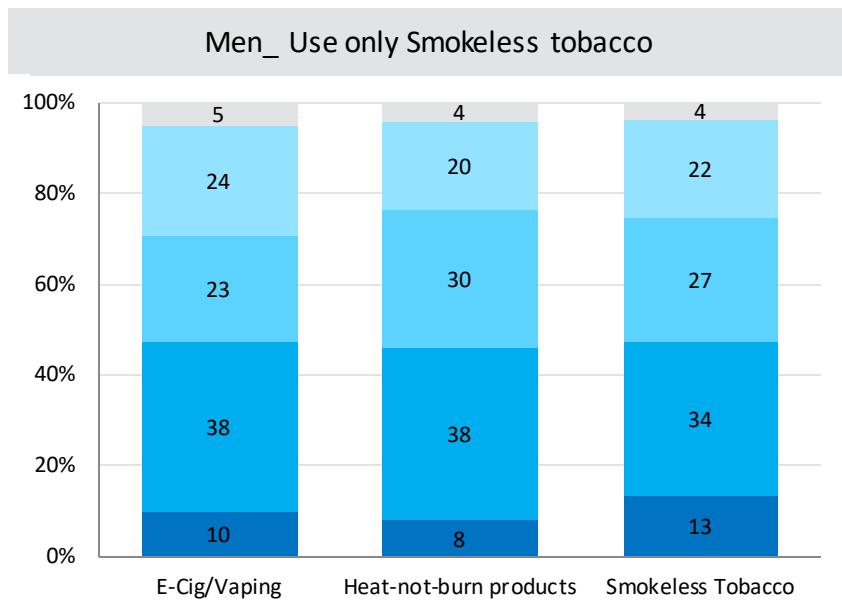
Beliefs and perceptions comparison among E-Cig, HNB and Smokeless tobacco

Use only Smokeless Tobacco

46% of the Men Solus users of Smokeless Tobacco Products who are aware of Heat-not-burn products are not worried/very little worried about the damage Heat-not-burn 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?

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



Figures are in %

Base: Random + Booster Sample, Current Users _ Use only Smokeless Tobacco products _ Those who are aware of the respective products:

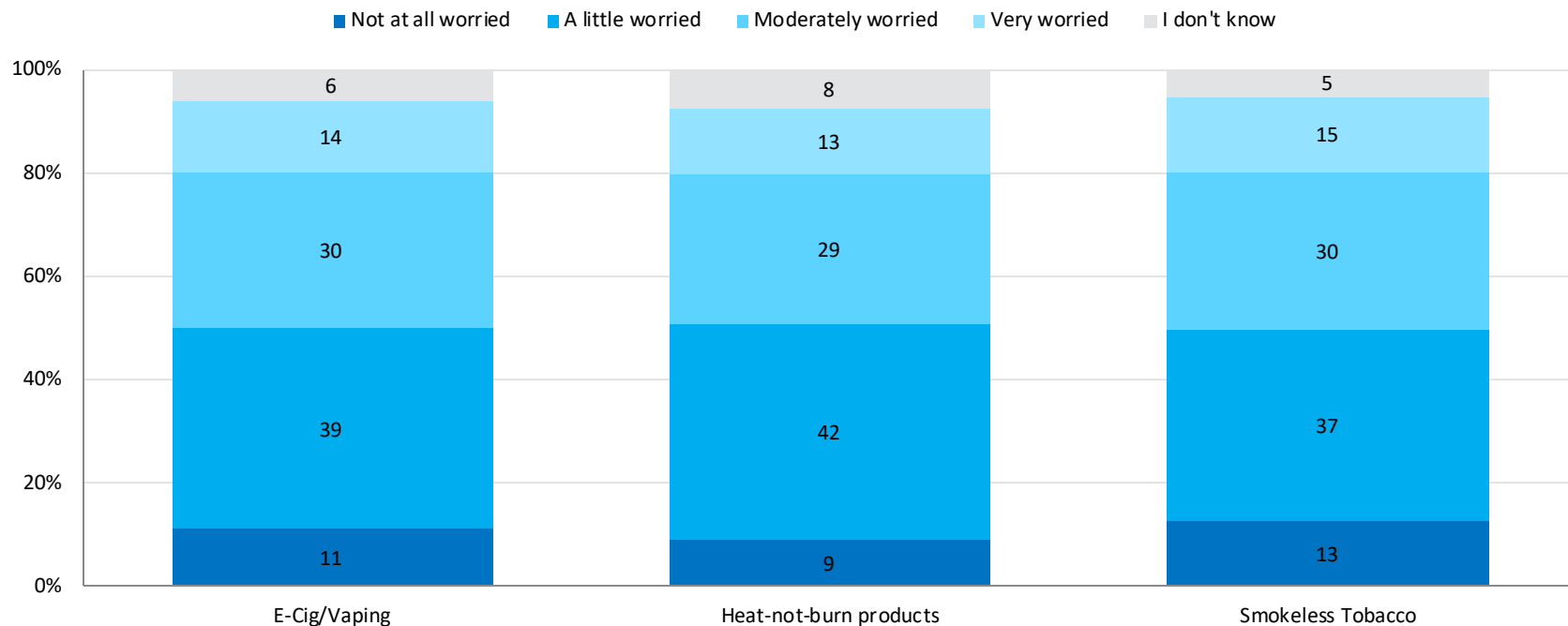
— Cig Men: n=1553 Women: n=515; Heat-not-burn products Men: n=1594 Women: n=543; Smokeless tobacco Men: n=8165; Women: n=2801

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

Dual/ Poly Users

51% the Dual/ Poly users who are aware of Heat-not-burn products 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?



%

1+ Booster Sample, Current Dual/ Poly users of tobacco products/ other products_ Those who are aware of the respective products : 6; Heat-not-burn products n : 2263; Smokeless tobacco n : 6854

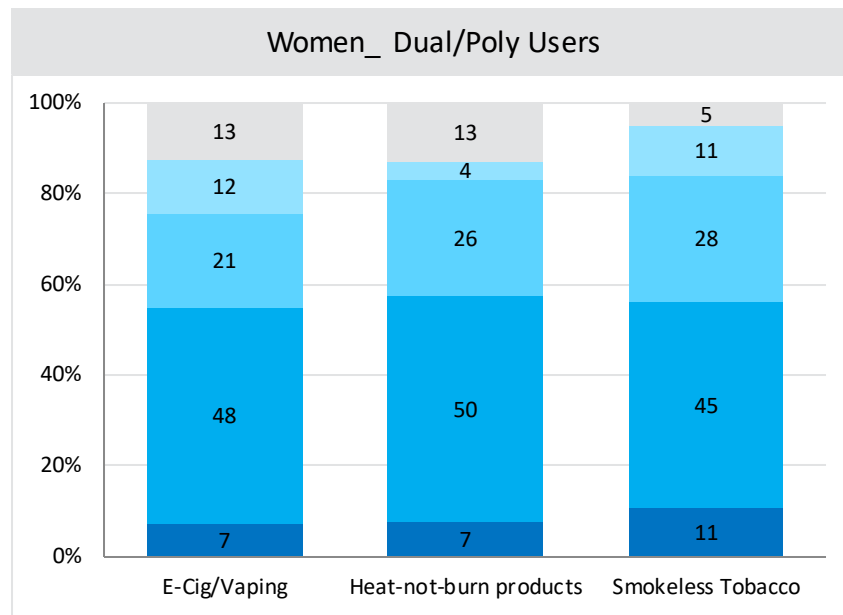
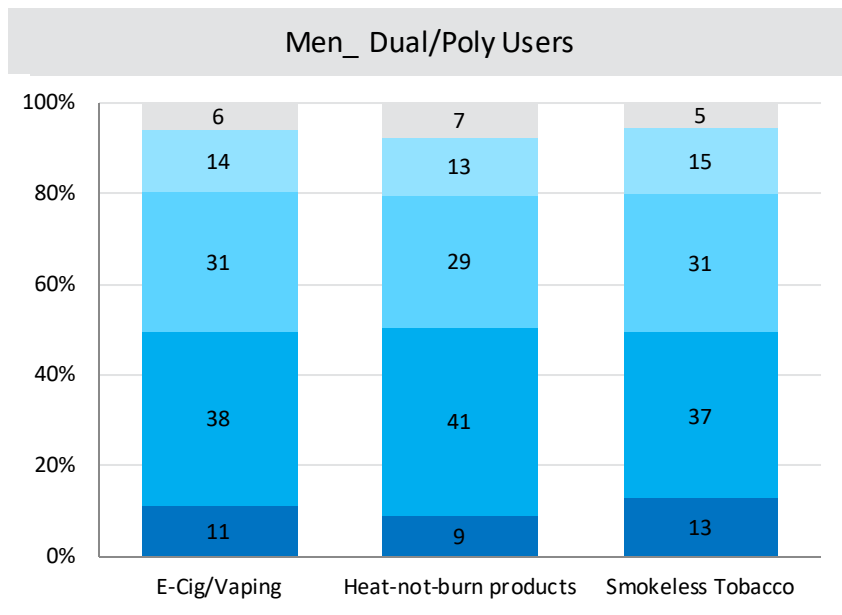
Beliefs and perceptions comparison among E-Cig, HNB and Smokeless tobacco

Dual/ Poly Users

57% the Women Dual/ Poly users who are aware of Heat-not-burn products 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?

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



Figures are in %

Base: Random + Booster Sample, Current Dual/ Poly users of tobacco products/ other products_ Those who are aware of the respective products:

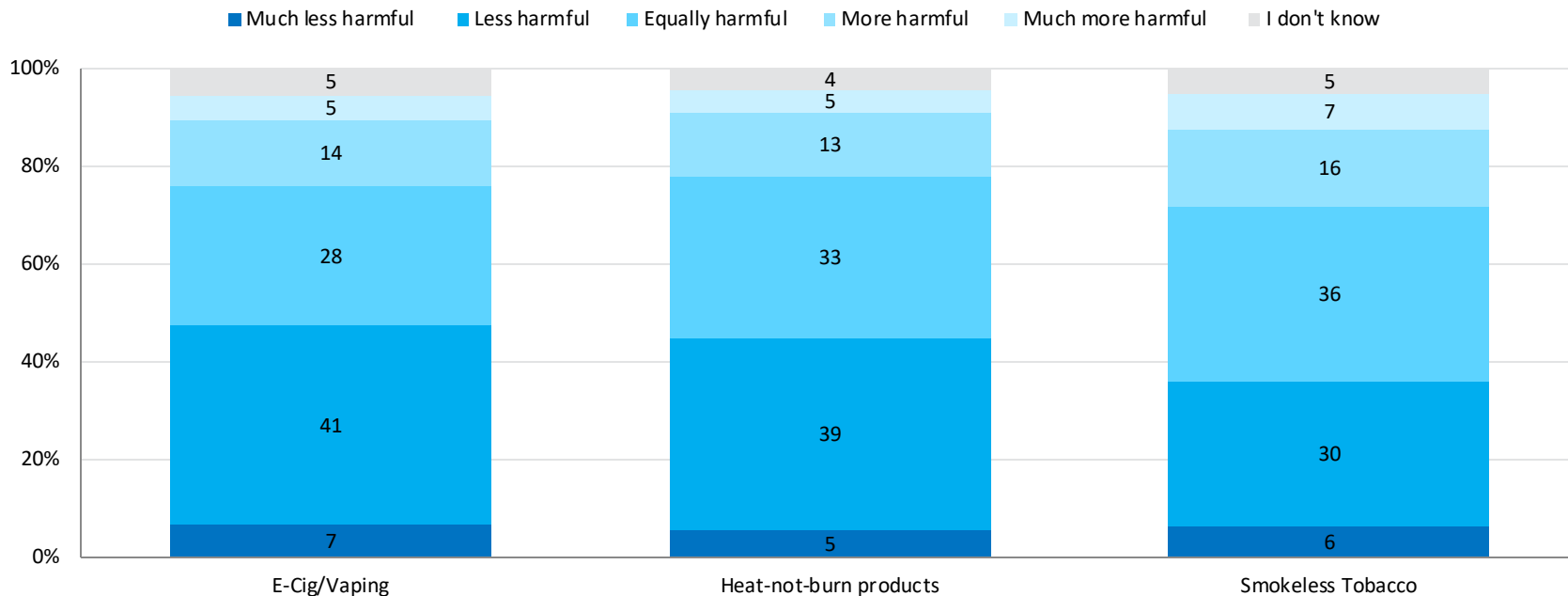
— Cig Men: n=2514 Women: n=111; Heat-not-burn products Men: n=2169 Women: n=94; Smokeless tobacco Men: n=6508 Women: n=344

Beliefs and perceptions- Current users of Tobacco Products

Smoke only Combustible Tobacco Products apart from Bidis

44% of Solus smokers of Combustible Tobacco Products (apart from Bidis) who are aware of Heat-not-burn products consider those as less harmful than smoking tobacco products and 33% of them consider those as equally harmful as smoking tobacco products.

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



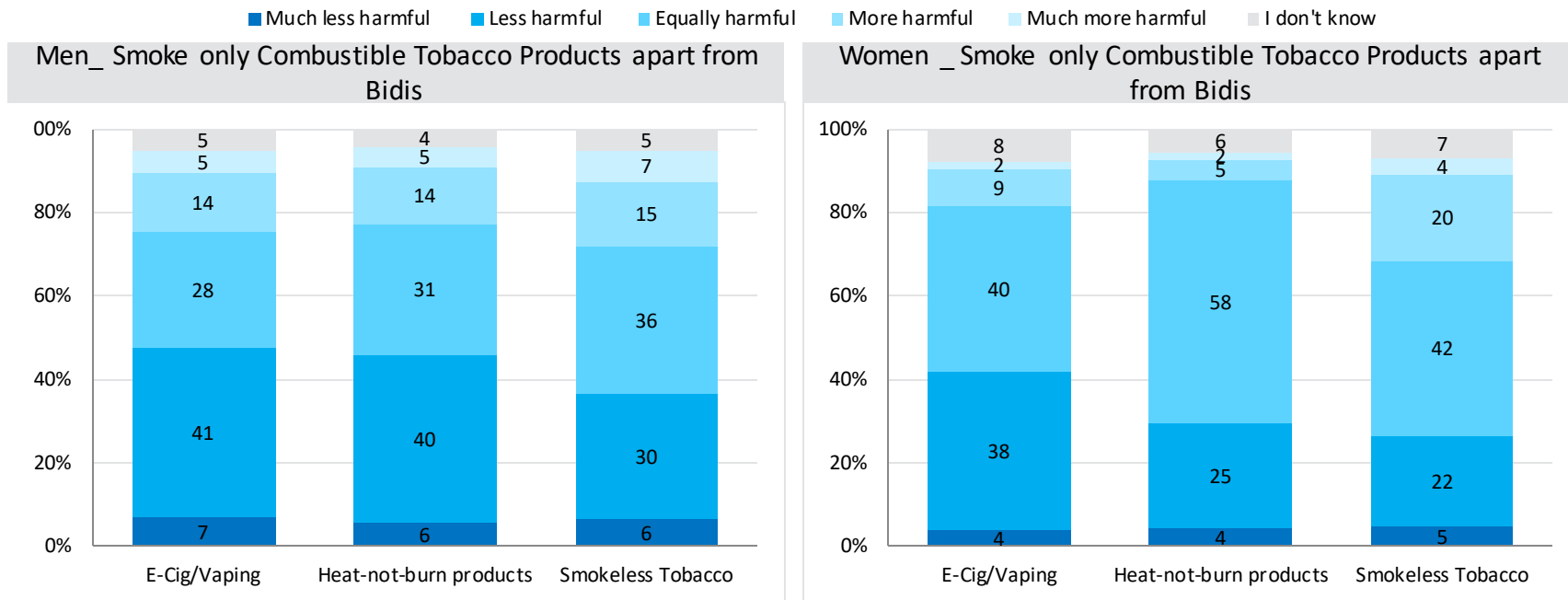
Booster Sample, Current users _ Smoke only Combustible Tobacco Products apart from Bidis_ Those who are aware of the respective products :
Heat-not-burn products n: 5941; Smokeless tobacco n: 8905

Beliefs and perceptions- Current users of Tobacco Products

Smoke only Combustible Tobacco Products apart from Bidis

However, among women solus smokers of Combustible Tobacco Products 58% consider Heat-not-burn as equally harmful as smoking tobacco products.

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



Figures are in %

Base: Random + Booster Sample, Current users _ Smoke only Combustible Tobacco Products apart from Bidis_ Those who are aware of the respective products

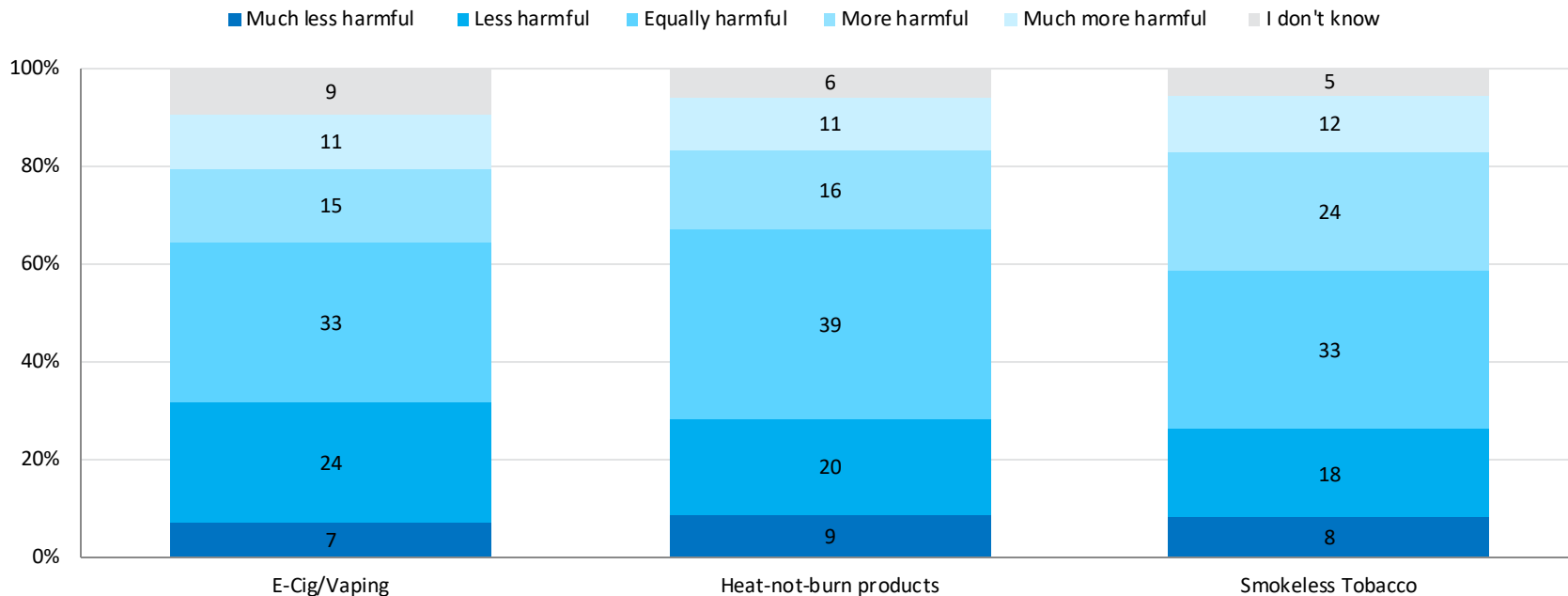
- Cig Men: n=6453; Women: n=449; Heat-not-burn products Men: n=5561; Women: n=380; Smokeless tobacco Men: n=8434; Women: n=471

Beliefs and perceptions- Current users of Tobacco Products

Smoke only Bidis

39% of solus Bidi smokers who are aware of Heat-not-burn products consider those as equally harmful as smoking tobacco products and 29% of them consider those as less harmful than smoking tobacco products.

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



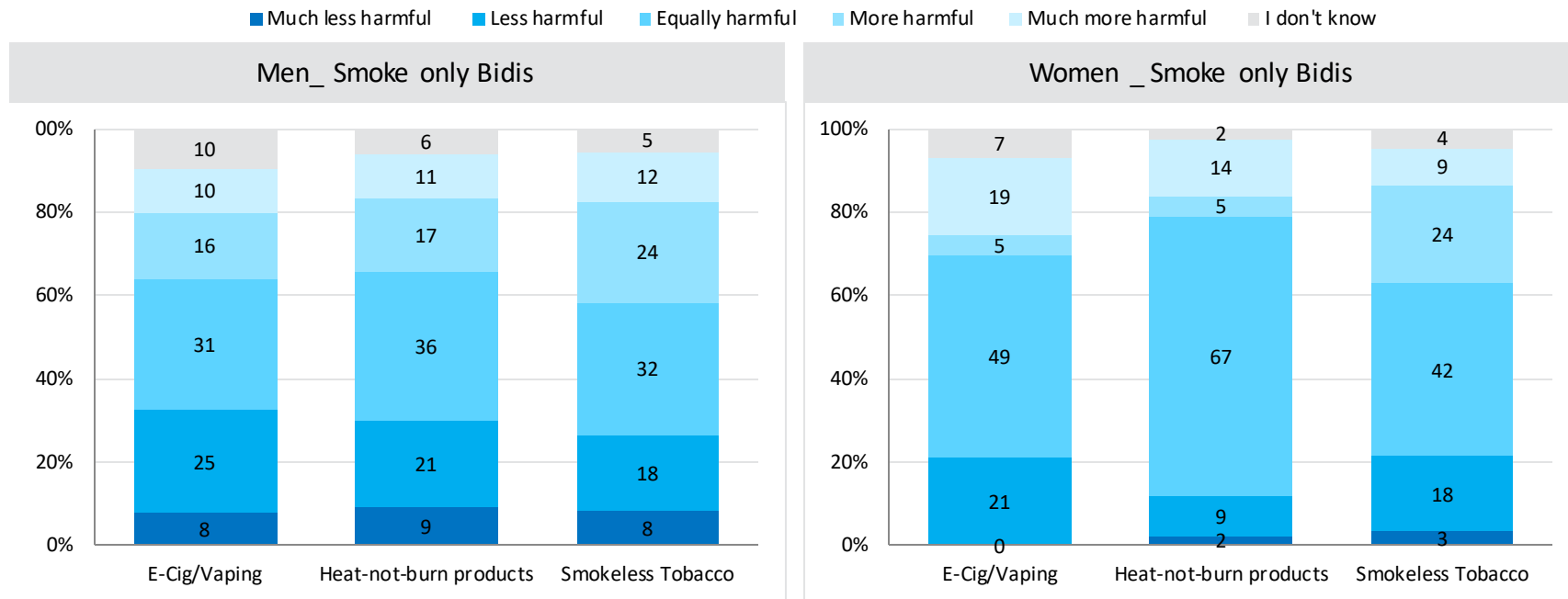
BoosterSample, Current Users_ Smoke only Bidis Those who are aware of the respective products :
Heat-not-burn products n:495; Smokeless tobacco n :1278

Beliefs and perceptions- Current users of Tobacco Products

Smoke only Bidis

67% of Women solus Bidi smokers who are aware of Heat-not-burn products consider those as equally harmful as smoking tobacco products.

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



Figures are in %

Base: Random + Booster Sample, Current Users _ Smoke only Bidis Those who are aware of the respective products:

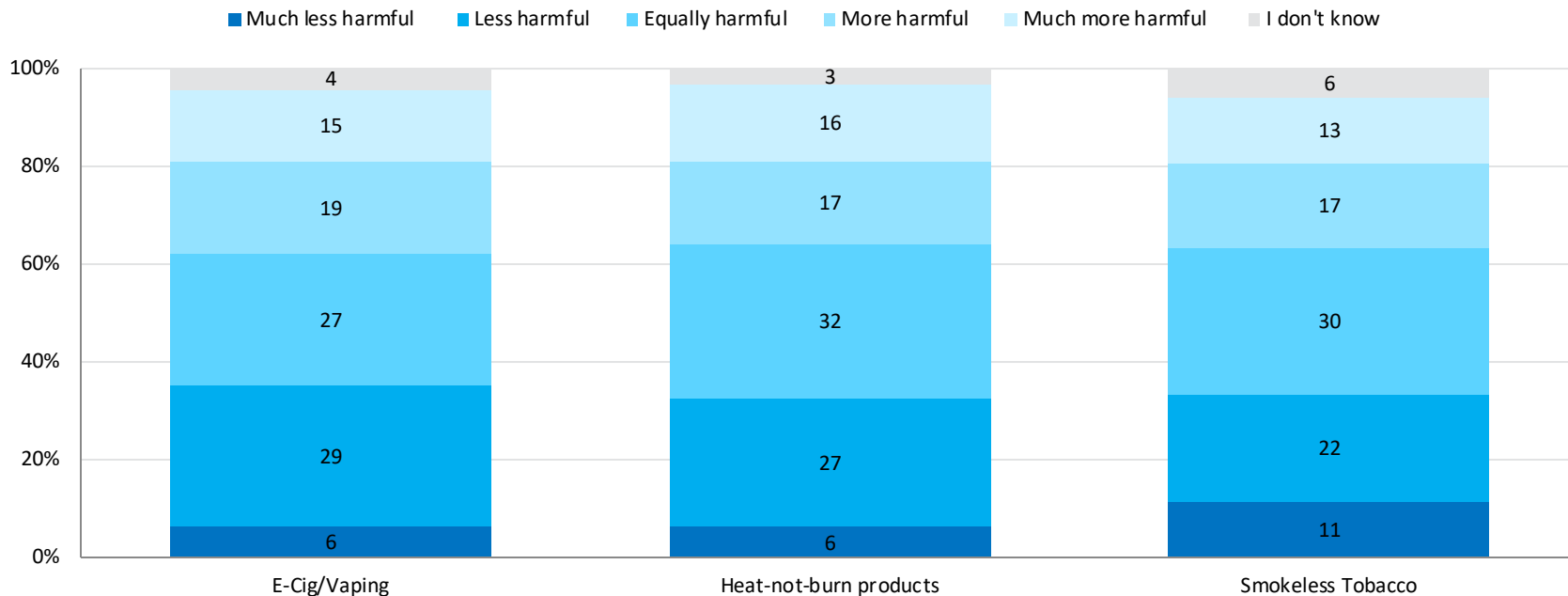
- Cig Men: n=431; Women: n=43; Heat-not-burn products Men: n=452; Women: n=43; Smokeless tobacco Men: n=1189; Women: n=89

Beliefs and perceptions- Current users of Tobacco Products

Use Smokeless Tobacco Products

This group is divided in their opinions on this topic; 33% of Solus users of Smokeless Tobacco Products who are aware of Heat-not-burn products consider those as less harmful than smoking tobacco products and 32% of them consider those as equally harmful than smoking tobacco products.

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



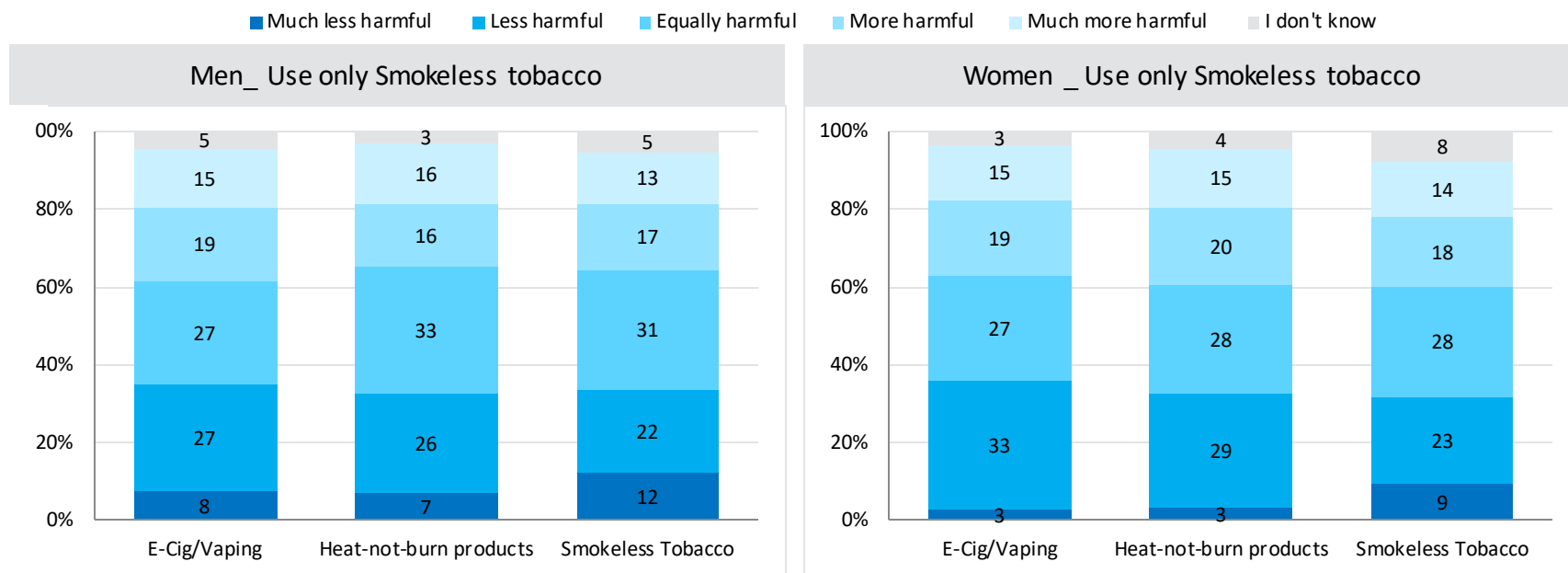
Booster Sample, Current Users _ Use only Smokeless Tobacco products_ Those who are aware of the respective products
Heat-not-burn products n: 2137; Smokeless tobacco n: 10966

Beliefs and perceptions- Current users of Tobacco Products

Use only Smokeless Tobacco

Both men and women solus users of Smokeless Tobacco Products are divided in their opinions; around 1 in 3 of them think that Heat-not-burn is less harmful than smoking tobacco products; and 1 in 3 of them consider these as equally harmful as smoking Tobacco.

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



Figures are in %

Base: Random + Booster Sample, Current Users _ Use only Smokeless Tobacco products_ Those who are aware of the respective products: E-Cig

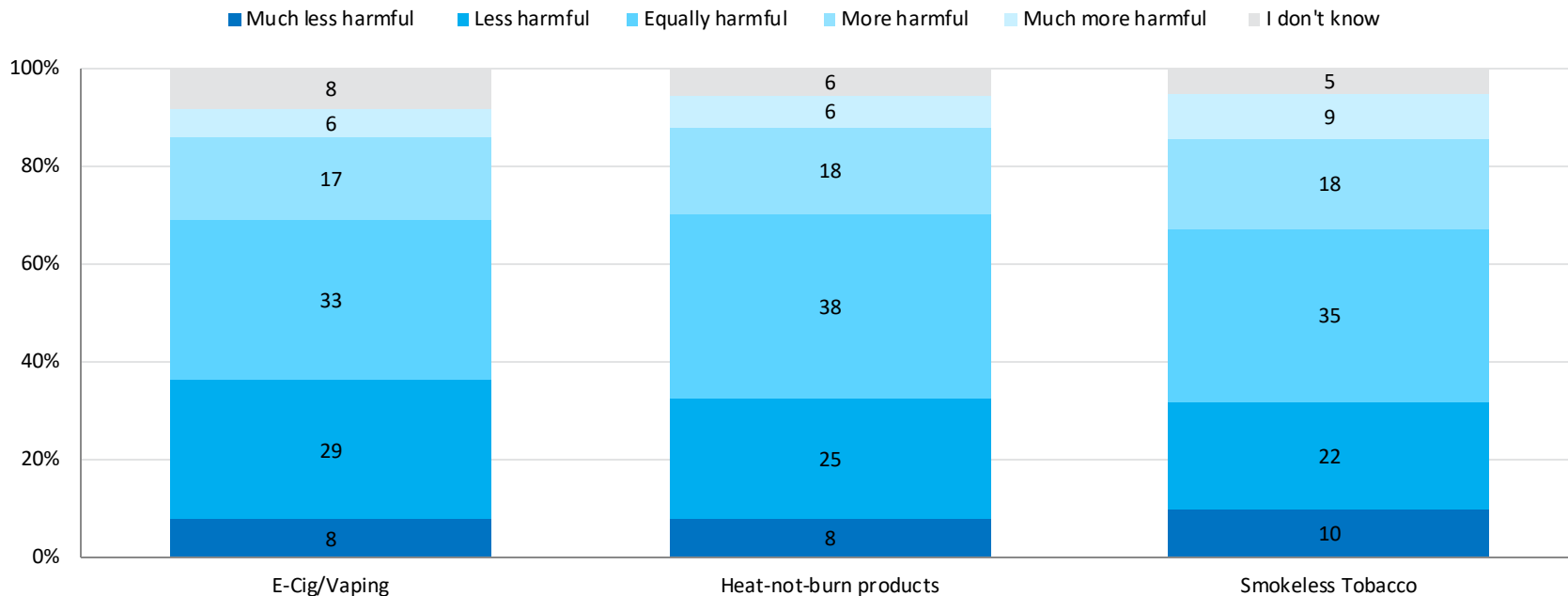
Men: n=1553; Women: n=515; Heat-not-burn products Men: n=1594; Women: n=543; Smokeless tobacco Men: n=8165; Women: n=2801

Beliefs and perceptions- Current users of Tobacco Products

Dual/Poly Users

37% of Dual/Poly users who are aware of E-Cig consider these as less harmful than smoking tobacco and 33% of them consider E-Cig as equally harmful as smoking tobacco products.

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



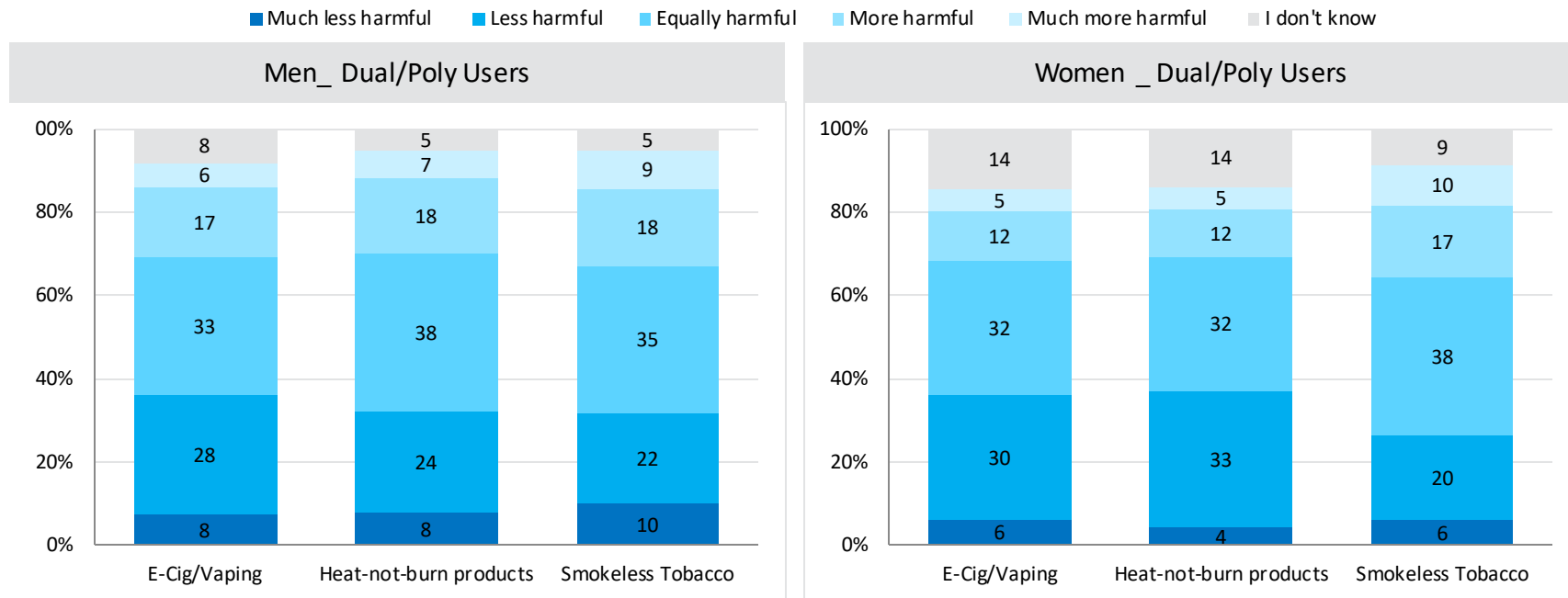
Booster Sample, Current Users_ Use only Smokeless Tobacco products_ Those who are aware of the respective products :
Heat-not-burn products n:2263; Smokeless tobacco n : 6854

Beliefs and perceptions- Current users of Tobacco Products

Dual/ Poly Users

37% of Women Dual/Poly users who are aware of Heat-not-burn products consider these as less harmful than smoking tobacco and 32% of them consider Heat-not-burn products as equally harmful as smoking tobacco products.

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



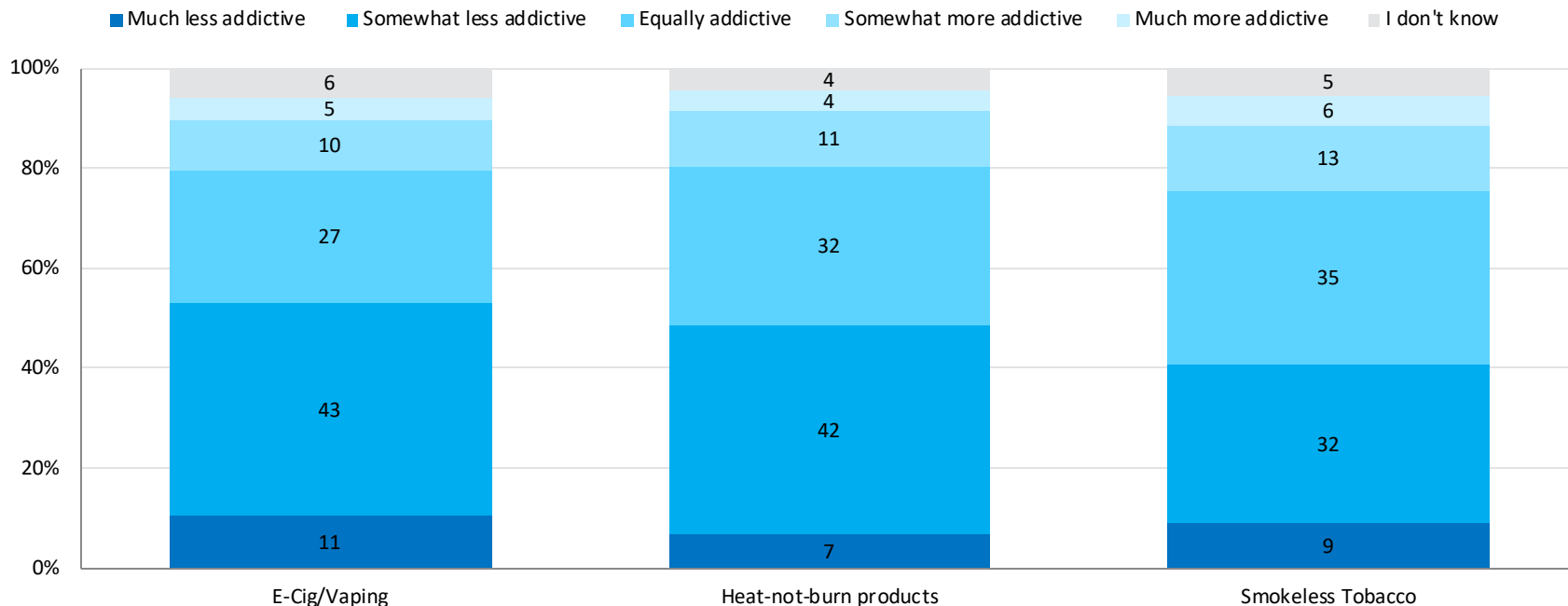
Figures are in %
 Base: Random + Booster Sample, Those who are aware of the respective products: E-Cig Men: n=2514; Women: n=111; Heat-not-burn products Men: n=2169; Women: n=94;
 Smokeless tobacco Men: n=6508; Women: n=344

Beliefs and perceptions- Current users of Tobacco Products

Smoke only Combustible Tobacco Products apart from Bidis

49% of Solus smokers of Combustible Tobacco Products (apart from Bidis) who are aware of Heat-not-burn products consider those as less addictive than smoking tobacco products and 32% of them consider those as equally addictive as smoking tobacco products.

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



BoosterSample, Current users who only smoke Combustible Tobacco Products apart from Bidis_ Those who are aware of the respective products :
-Heat-not-burn products n:5941; Smokeless tobacco n: 8905

Beliefs and perceptions- Current users of Tobacco Products

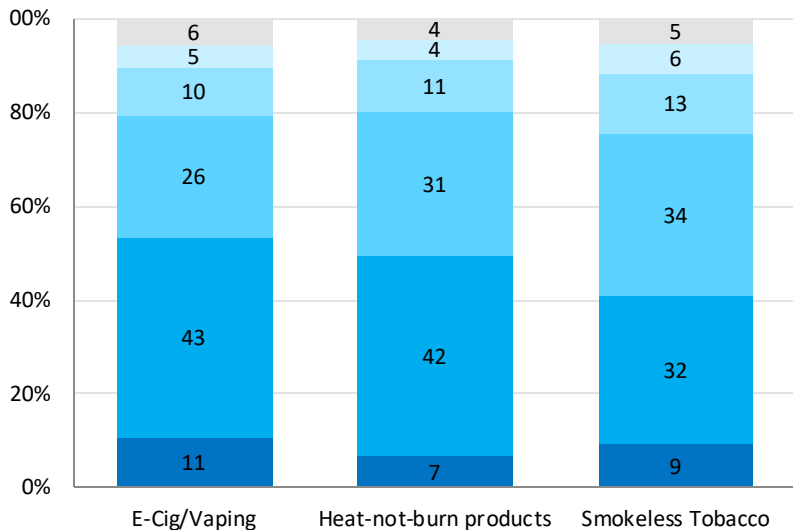
Smoke only Combustible Tobacco Products apart from Bidis

50% of Women solus smokers of Combustible Tobacco Products (apart from Bidis) who are aware of E-Cig consider those as less addictive than smoking tobacco products and 33% of them consider it as equally addictive as smoking tobacco products.

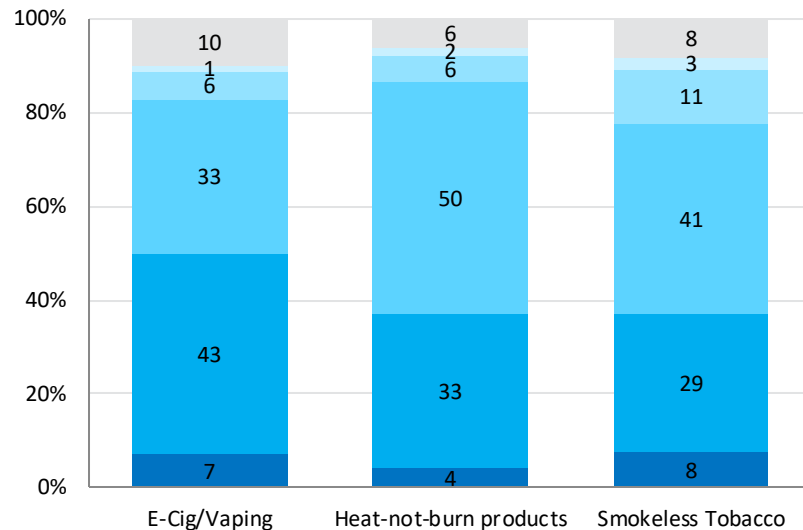
B8/10.1/10.9. Compared to smoking tobacco, would you say using this product is...?

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

Men_ Smoke only Combustible Tobacco Products apart from Bidis



Women_ Smoke only Combustible Tobacco Products apart from Bidis



figures are in %

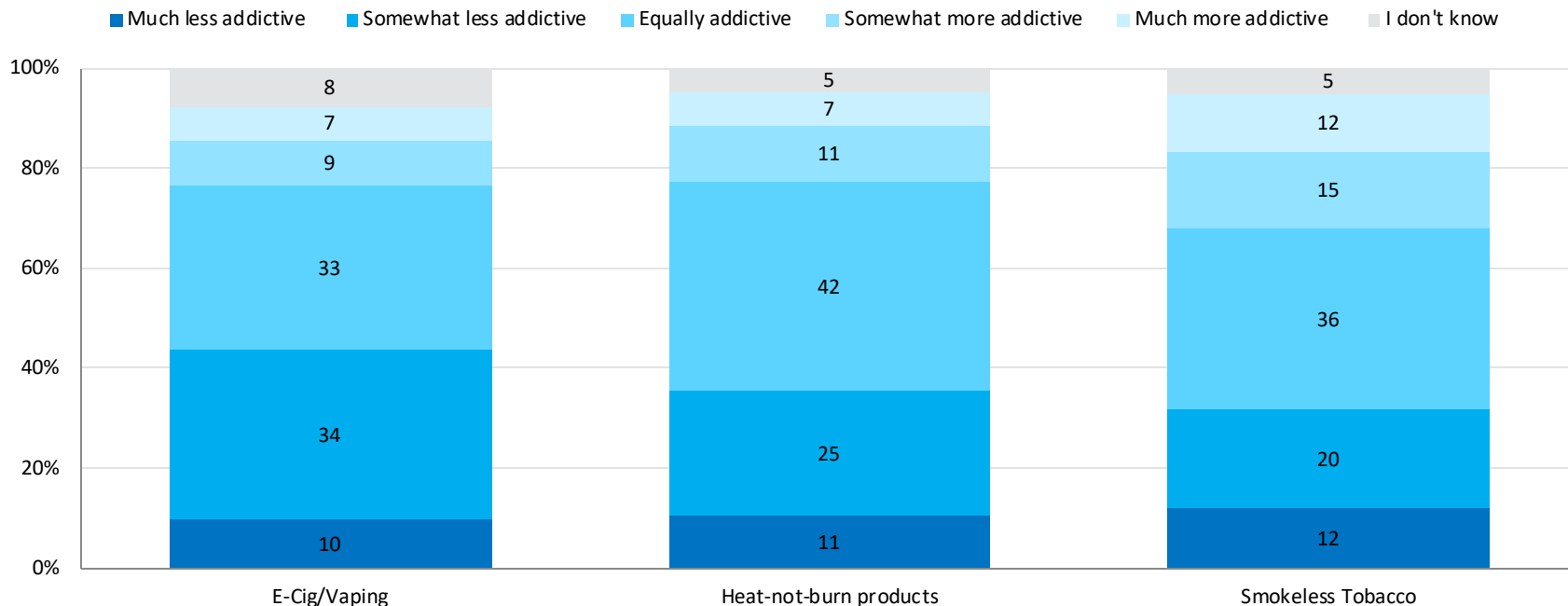
base : Random + Booster Sample, Those who are aware of the respective products: E - Cig Men: n=6453; Women: n=449; Heat-not-burn products Men: n=5561 Women: n=380; Smokeless tobacco Men: n=8434; Women: n=471

Beliefs and perceptions- Current users of Tobacco Products

Smoke only Bidis

44% of Solus smokers of Bidis who are aware of E-Cig consider those as less addictive than smoking tobacco products and 33% of them consider those as equally addictive as smoking tobacco products.

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



BoosterSample, Current Users_Smoke only Bidis Those who are aware of the respective products :
Heat-not-bum products n: 495; Smokeless tobacco n :1278

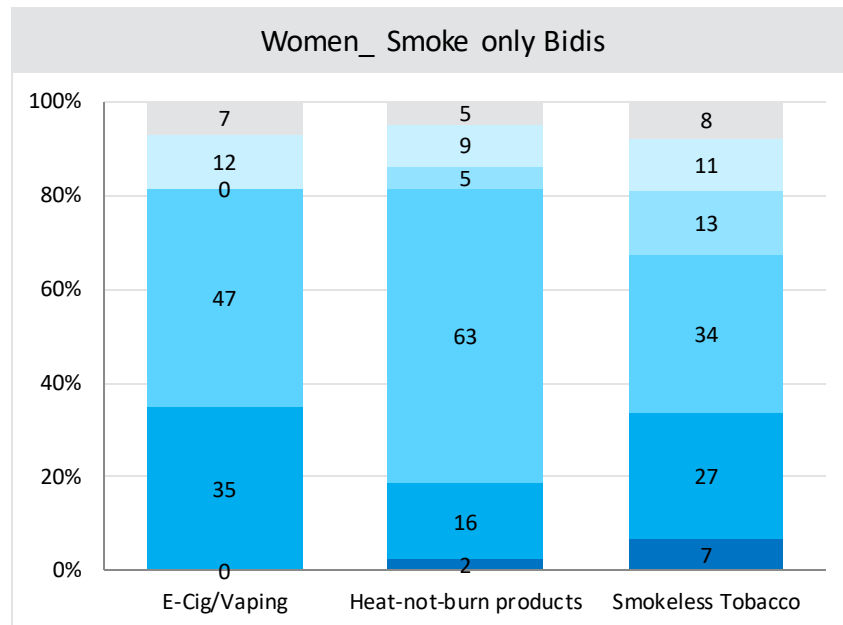
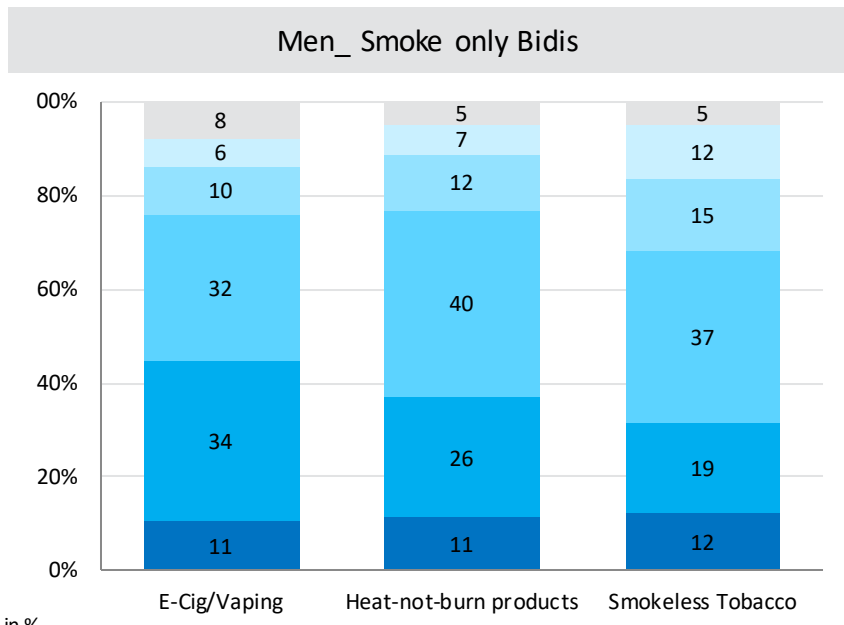
Beliefs and perceptions- Current users of Tobacco Products

Smoke only Bidis

37% of men Solus smokers of Bidis who are aware of smokeless products consider those as equally addictive as smoking tobacco products.

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 %

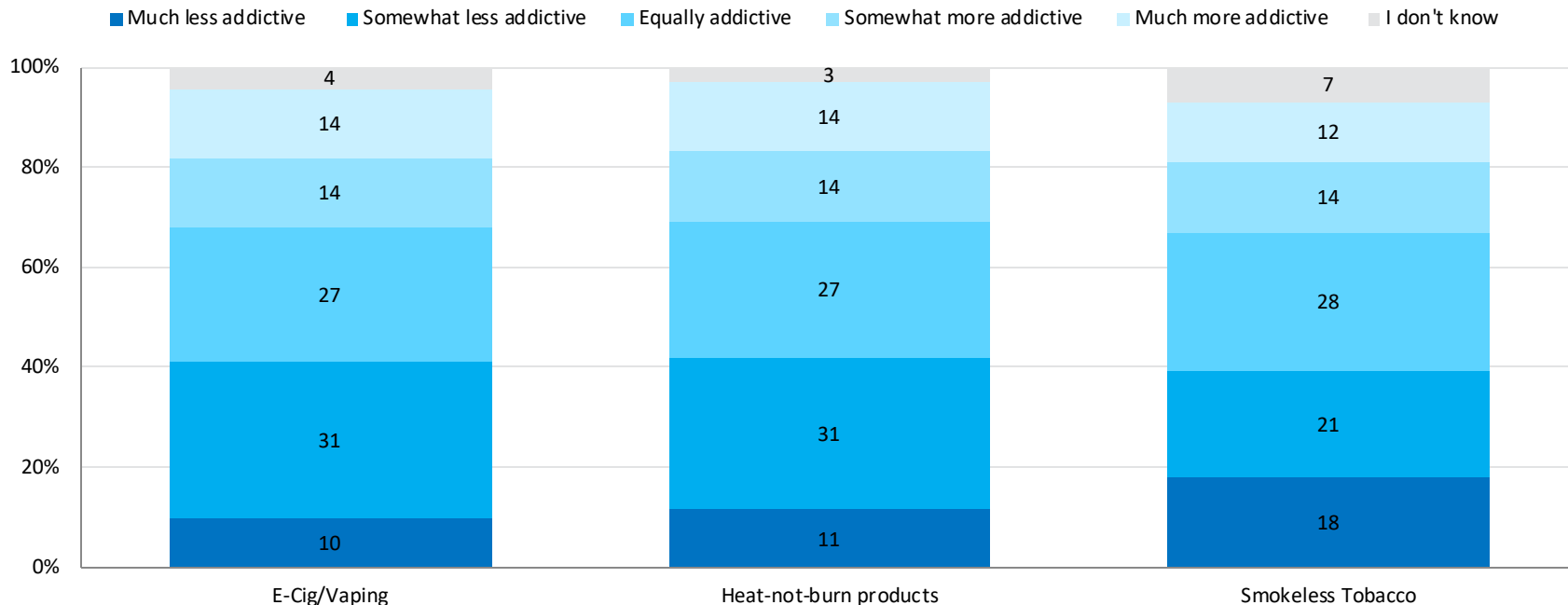
Base : Random + Booster Sample, Current Users_ Smoke only Bidis Those who are aware of the respective products: E - Cig Men: n=431; Women: n=43; Heat-not-burn products Men: n=452; Women: n=43; Smokeless tobacco Men: n=1189; Women: n=89

Beliefs and perceptions- Current users of Tobacco Products

Use only Smokeless Tobacco

42% of Solus users of Smokeless Tobacco Products who are aware of Heat-not-burn products consider those as less addictive than smoking tobacco products and 27% of them consider those as equally addictive as smoking tobacco products.

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



BoosterSample, Current Users_ Use only Smokeless Tobacco products_ Those who are aware of the respective products :
Heat-not-burn products n : 2137; Smokeless tobacco n : 10966

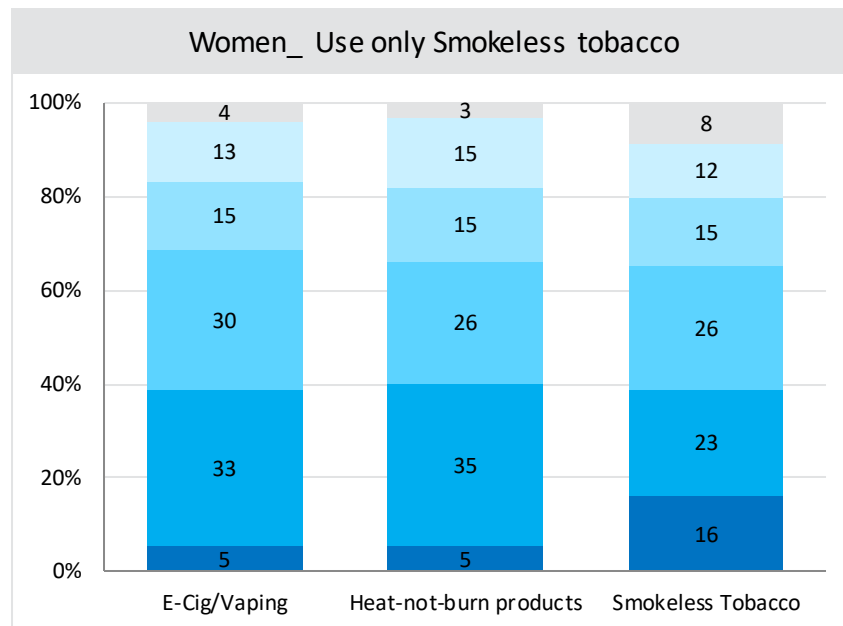
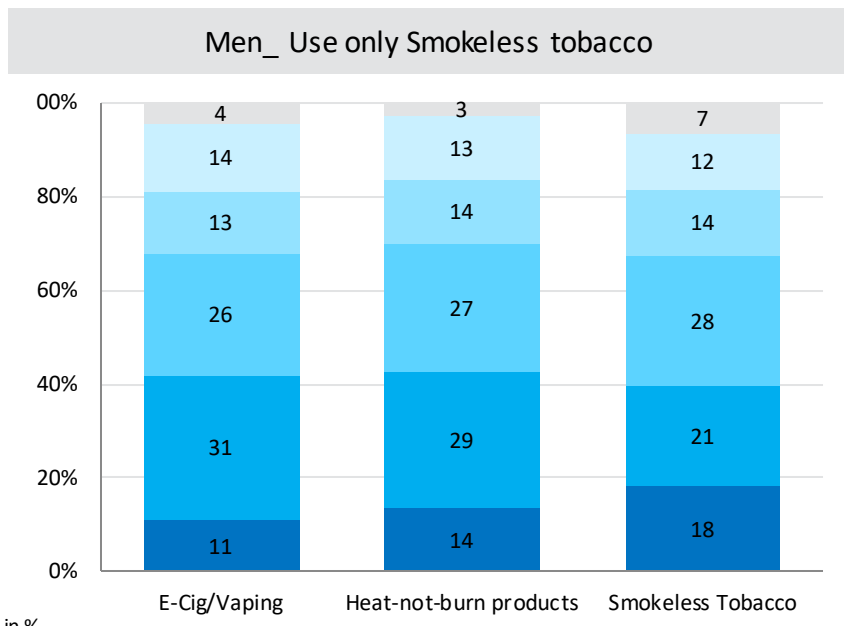
Beliefs and perceptions- Current users of Tobacco Products

Use only Smokeless Tobacco

42% of Men Solus users of Smokeless Tobacco Products who are aware of E-Cig consider those as less addictive than smoking tobacco products and 26% of them consider those as equally addictive as smoking tobacco products.

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 %

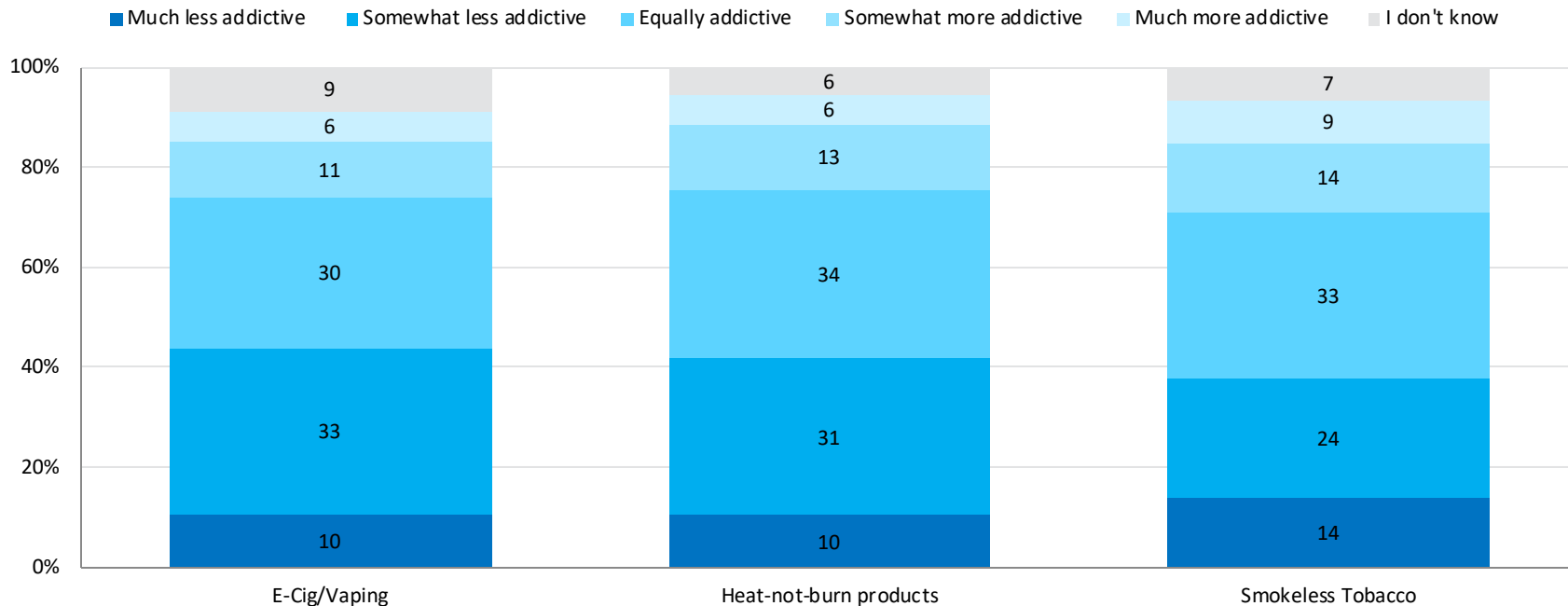
Base: Random + Booster Sample, Current Users_ Use only Smokeless Tobacco products_ Those who are aware of the respective products:
 - Cig Men: n=1553; Women: n=515; Heat-not-burn products Men: n=1594; Women: n=543; Smokeless tobacco Men: n=8165; Women: n=2801

Beliefs and perceptions- Current users of Tobacco Products

Dual/ Poly Users

41% of Dual/Poly users who are aware of Heat-not-burn products consider those as less addictive than smoking tobacco products and 34% of them consider those as equally addictive as smoking tobacco products.

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



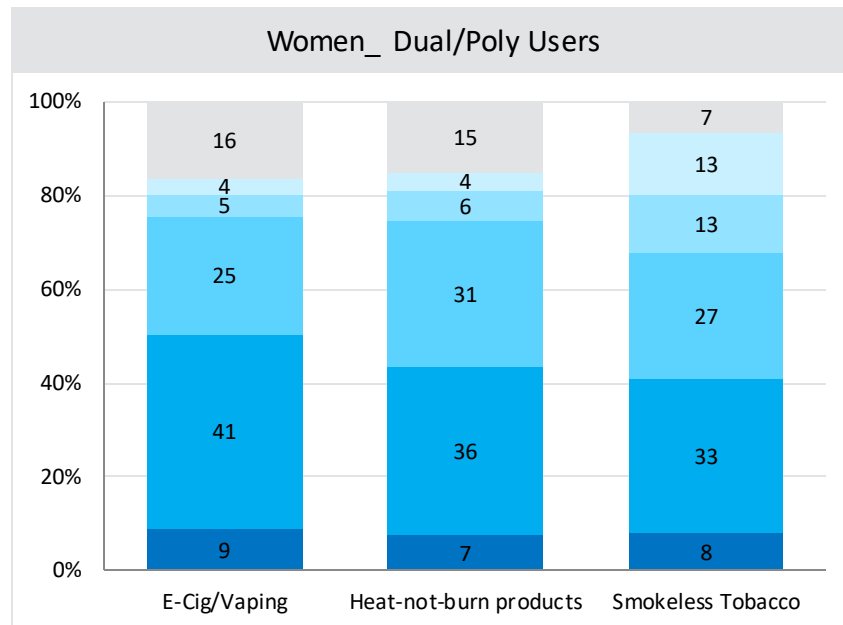
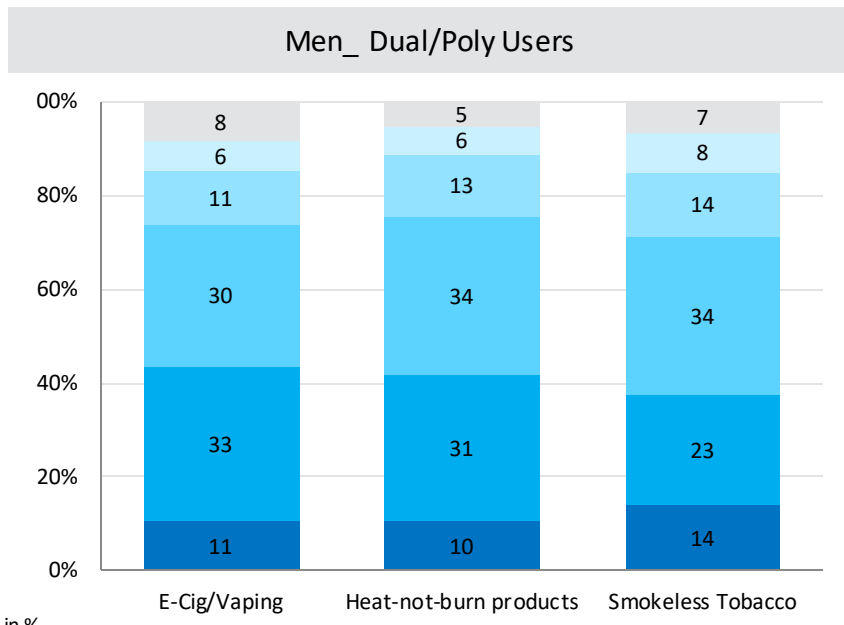
Beliefs and perceptions- Current users of Tobacco Products

Dual/ Poly Users

44% of Men Dual/Poly users who are aware of E-Cig consider those as less addictive than smoking tobacco products and 30% of them consider those as equally addictive as smoking tobacco products.

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

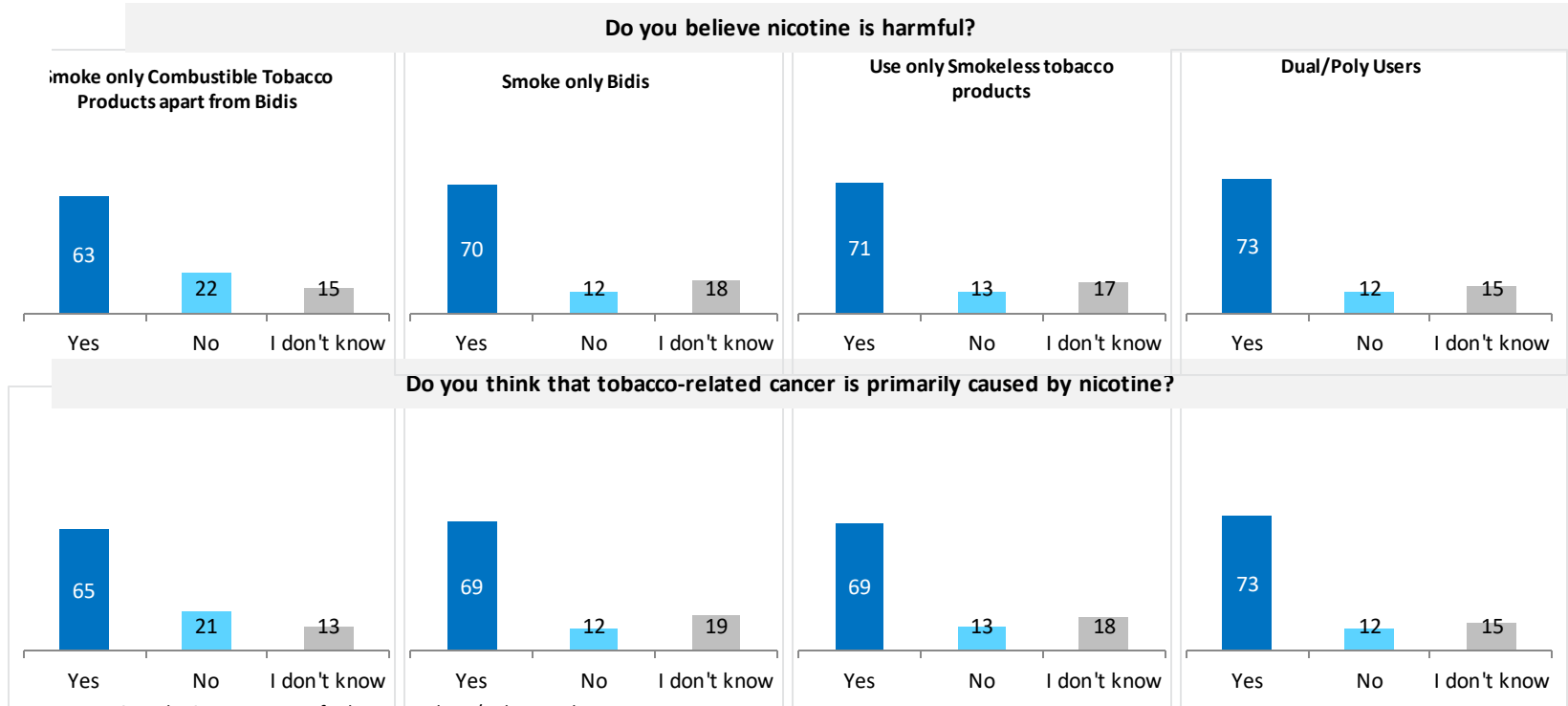
■ Much less addictive ■ Somewhat less addictive ■ Equally addictive ■ Somewhat more addictive ■ Much more addictive ■ I don't know



Figures are in %

Base: Random + Booster Sample, Those who are aware of the respective products: E-Cig Men: n=2514; Women: n=111; Heat-not-burn products Men: n=2169; Women: n=94; Smokeless tobacco Men: n=6508; Women: n=344

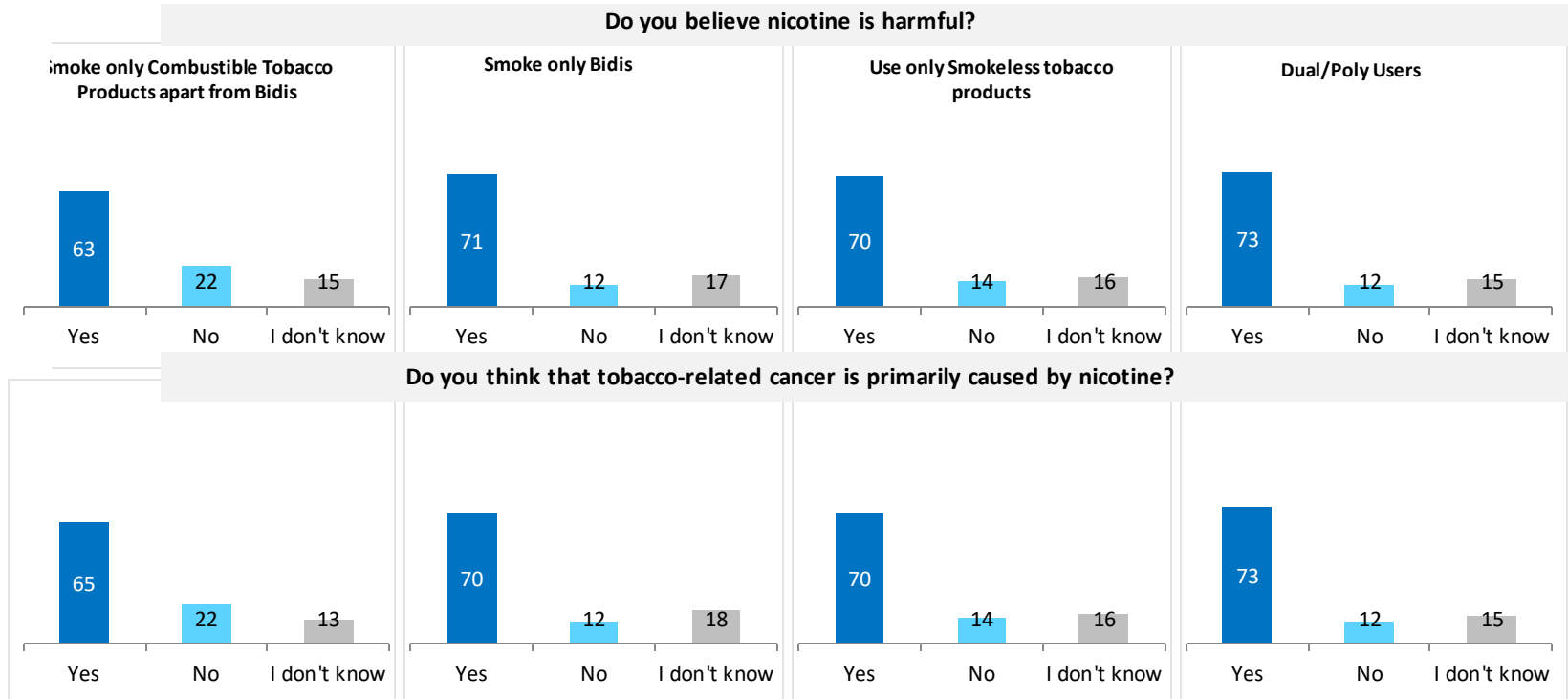
marily caused by nicotine.



Booster Sample, Current Users of tobacco products/ other products :

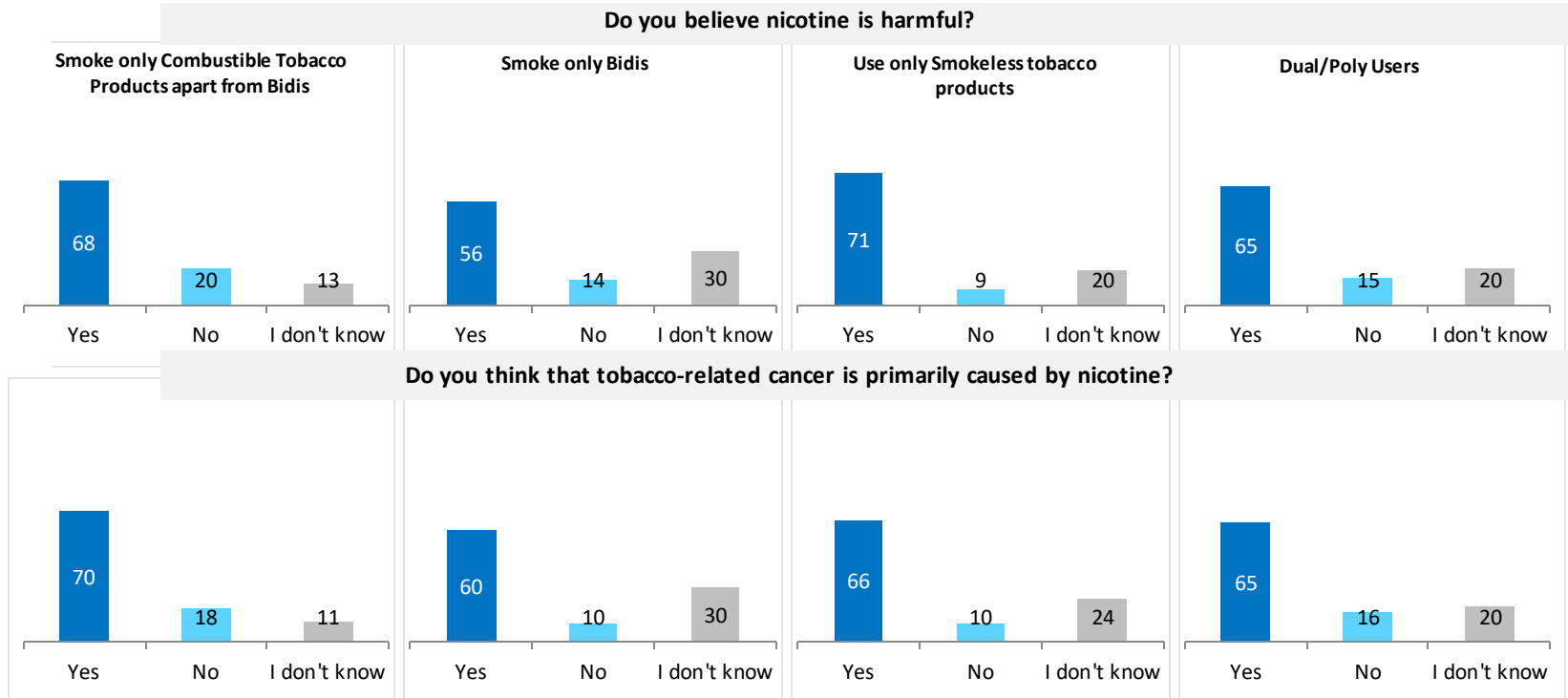
Smoke only Combustible Tobacco n=13711, Smoke only Bidis: n=2589, Use only Smokeless tobacco: n=10966, Dual/Poly: n=7748

er is primarily caused by nicotine.

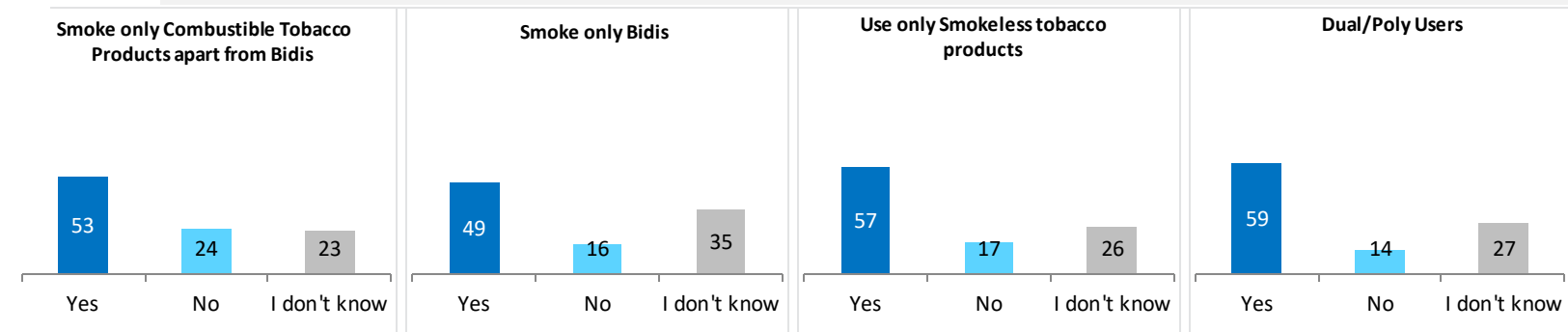


Booster Sample,
Smoke only Combustible Tobacco n=12889, Smoke only Bidis: n=2392, Use only Smokeless tobacco: n=8165, Dual/Poly: n=7384

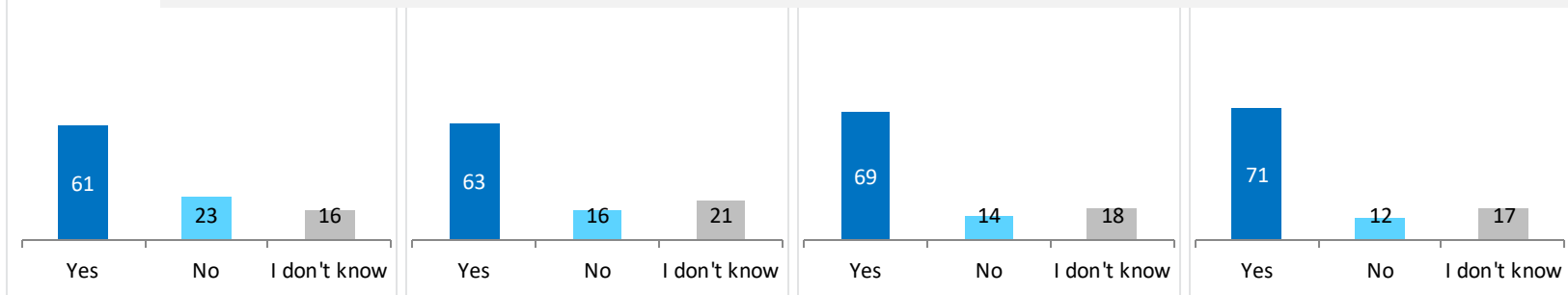
er is primarily caused by nicotine.



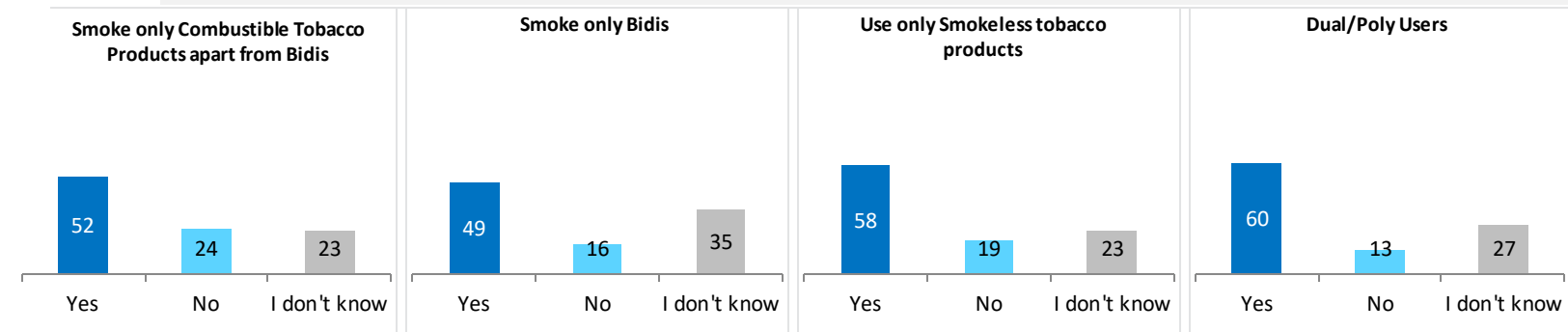
Do you think nicotine in e-cigarettes and nicotine replacement therapies like patch or gum cause cancer?



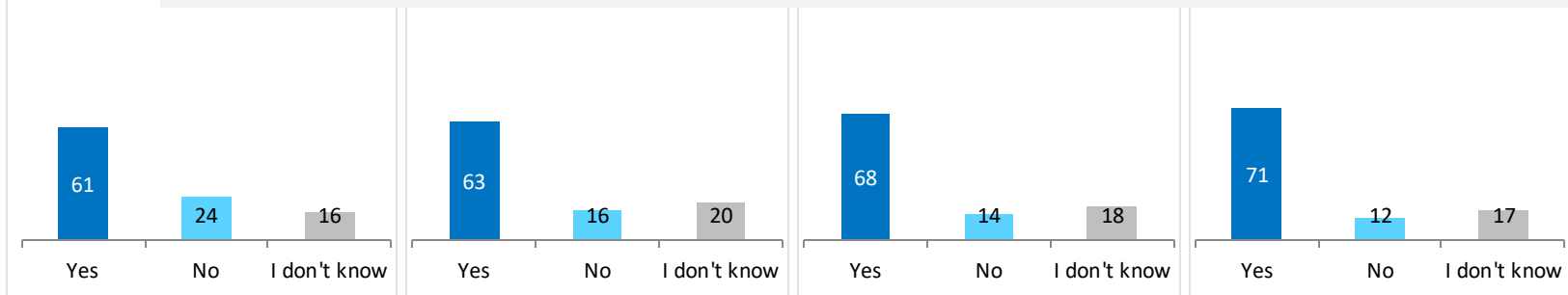
Do you think that nicotine is addictive or just habit forming like caffeine?



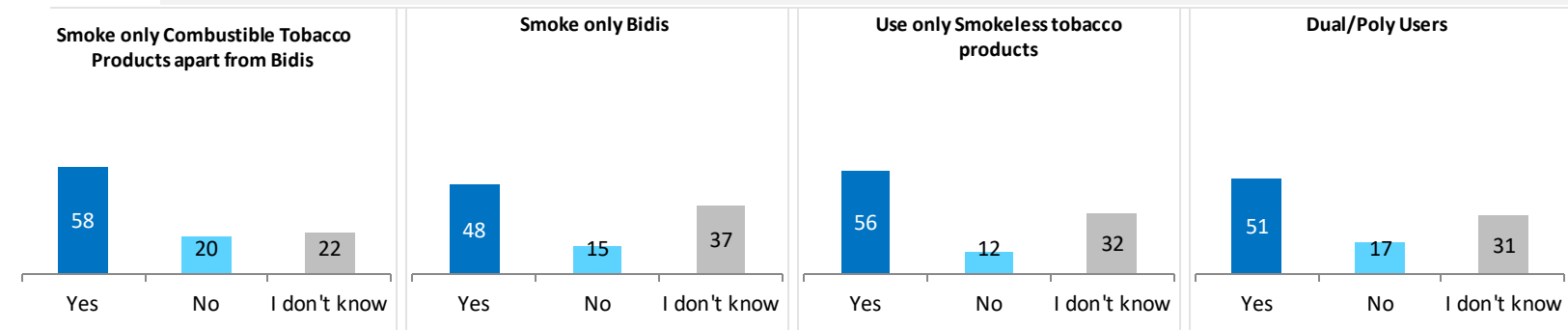
Do you think nicotine in e-cigarettes and nicotine replacement therapies like patch or gum cause cancer?



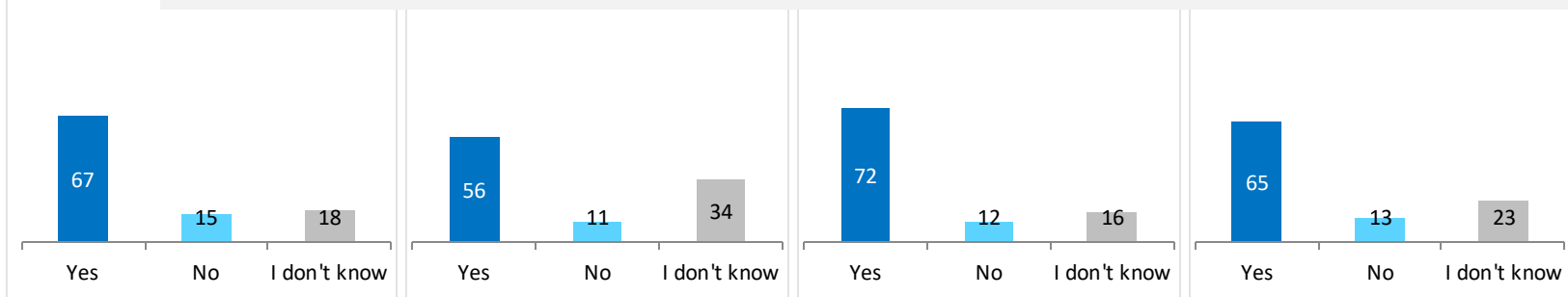
Do you think that nicotine is addictive or just habit forming like caffeine?



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



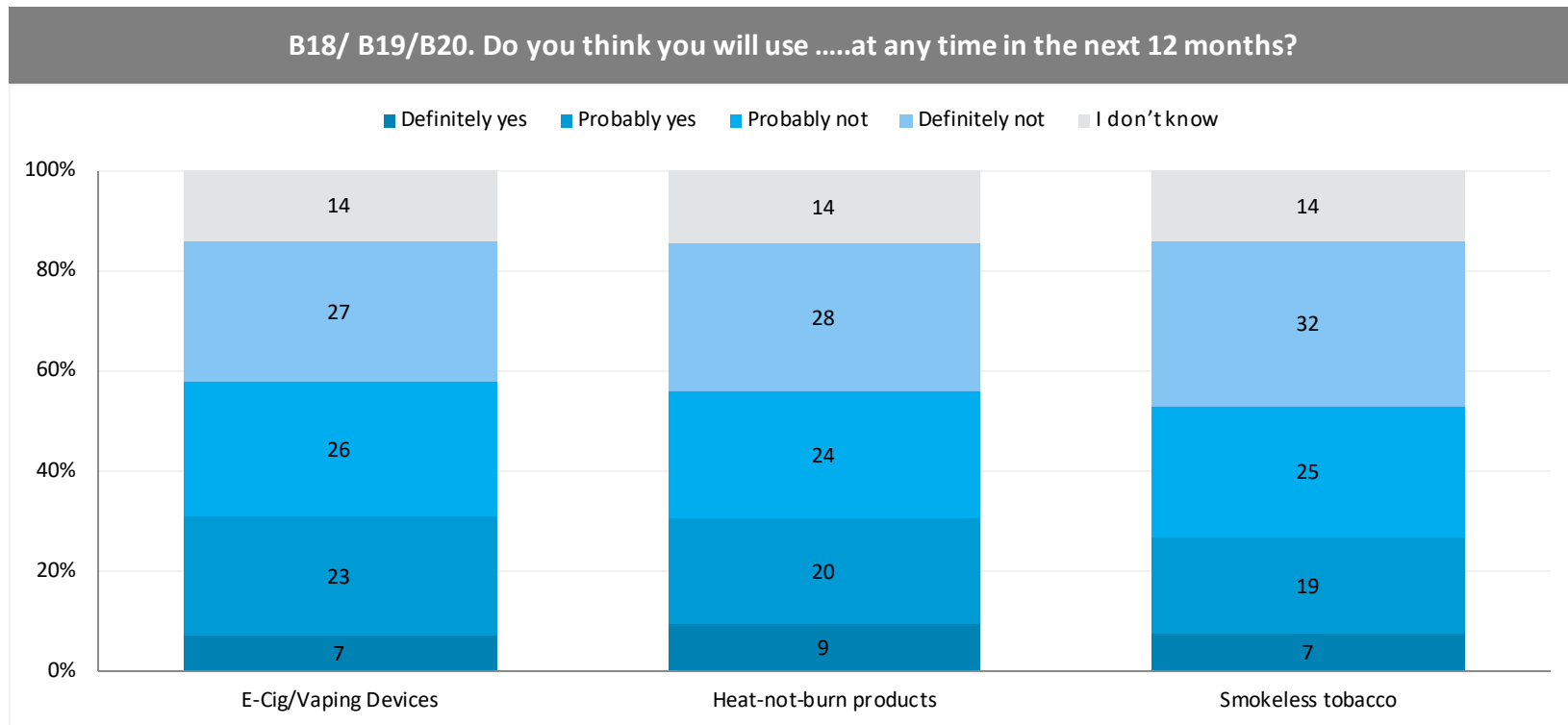
Do you think that nicotine is addictive or just habit forming like caffeine?



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

Smoke only Combustible Tobacco Products apart from Bidis

Among the solus smokers of Combustible Tobacco Products apart from Bidis; 29% of them are willing to use Heat-not-burn products in the next 12 months.



%

i+Booster Sample, Tobacco users/ other product users who are non users of E-Cig n: 13711, non users of Heat-not-burn products n: 13711, non users of smokeless tobacco n:13711

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

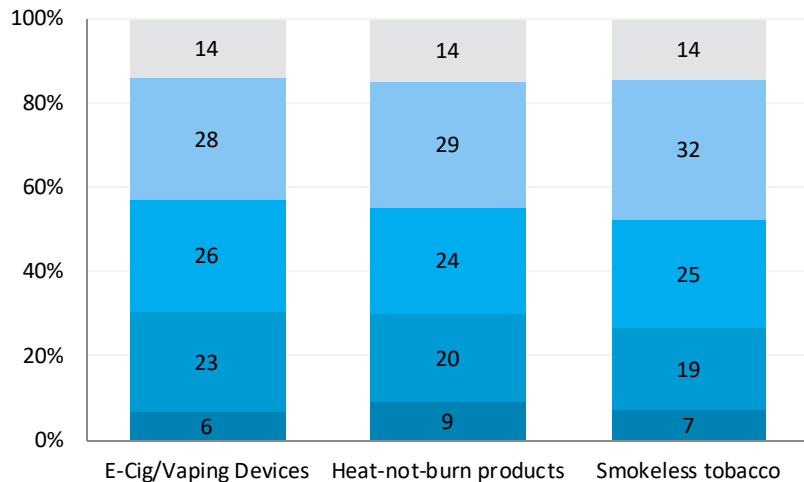
Smoke only Combustible Tobacco Products apart from Bidis

Among the Women solus smokers of Combustible Tobacco Products apart from Bidis; 33% of them are willing to use Heat-not-burn products in the next 12 months.

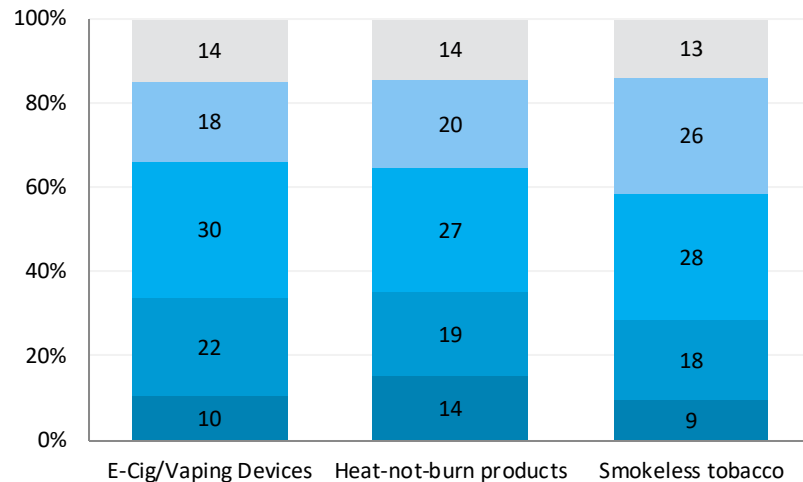
B18/ B19/B20. Do you think you will useat any time in the next 12 months?

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

Men_ Smoke only Combustible Tobacco Products apart from Bidis



Women_ Smoke only Combustible Tobacco Products apart from Bidis



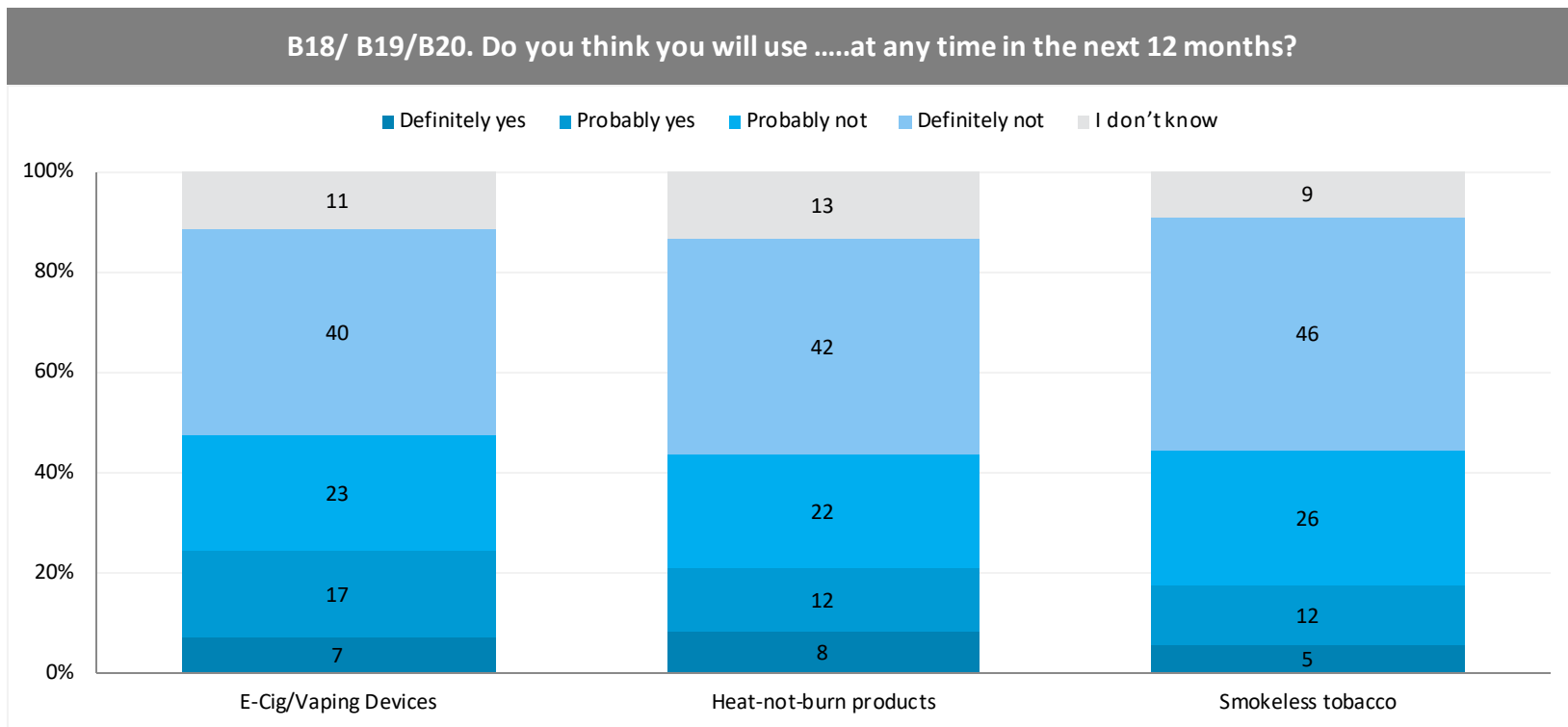
Figures are in %

Base : Random + Booster Sample, Tobacco users / other product users who are non users of E-Cig Men: n=12889; Women: n=822, non users of Heat-not-burn products Men: n=12889; Women: n=822, non users of smokeless tobacco Men: n=12889; Women: n=822

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

Smoke only Bidis

Among the solus smokers of Bidis, 20% of them are willing to use Heat-not-burn products in the next 12 months.



%

†+ Booster Sample, Current Users_Smoke only Bidis Tobacco users/ other product users who are non users of non users of Heat-not-burn products n: 2589, non users of smokeless tobacco n:2589

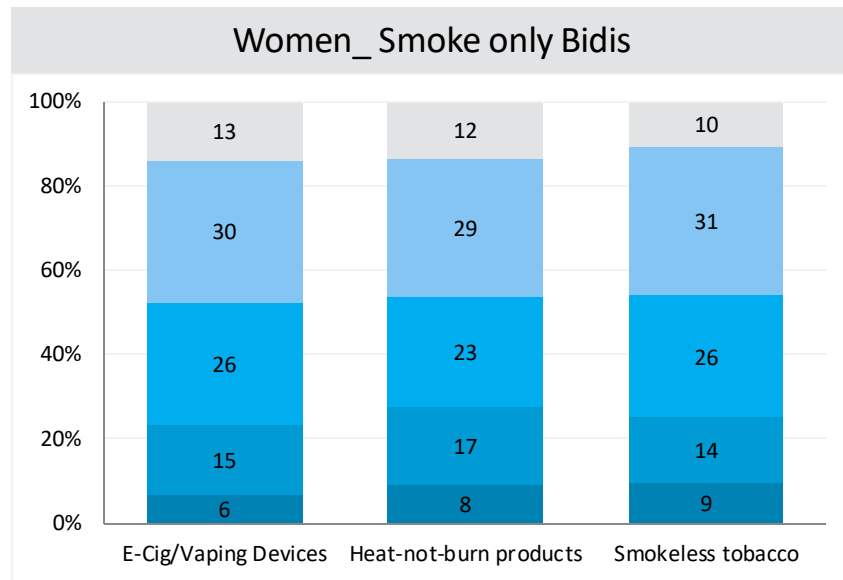
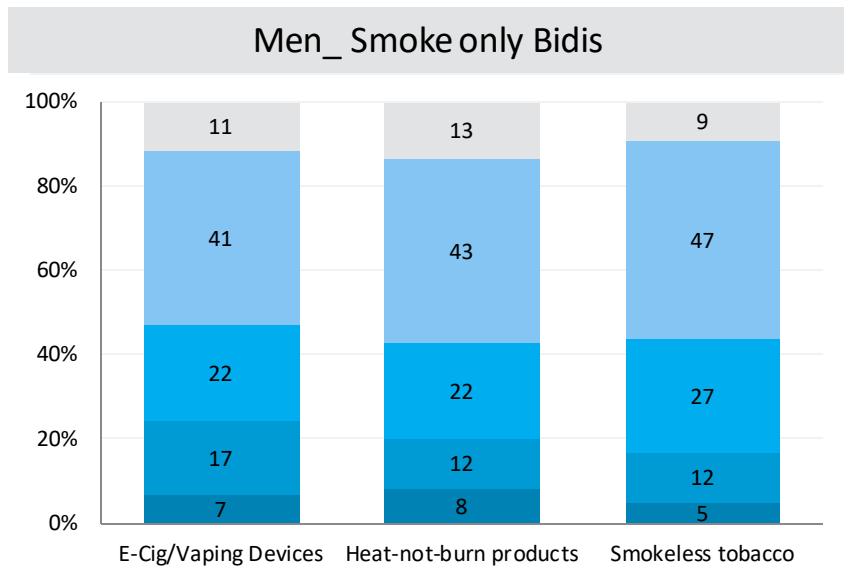
Intention to purchase : E-Cig, Heat-not-burn, Smokeless tobacco

Smoke only Bidis

Among the men solus smokers of Bidis; 24% of them are willing to use E-Cig in the next 12 months

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 + Booster Sample, Current Users_ Smoke only Bidis Tobacco users/ other product users who are non users of

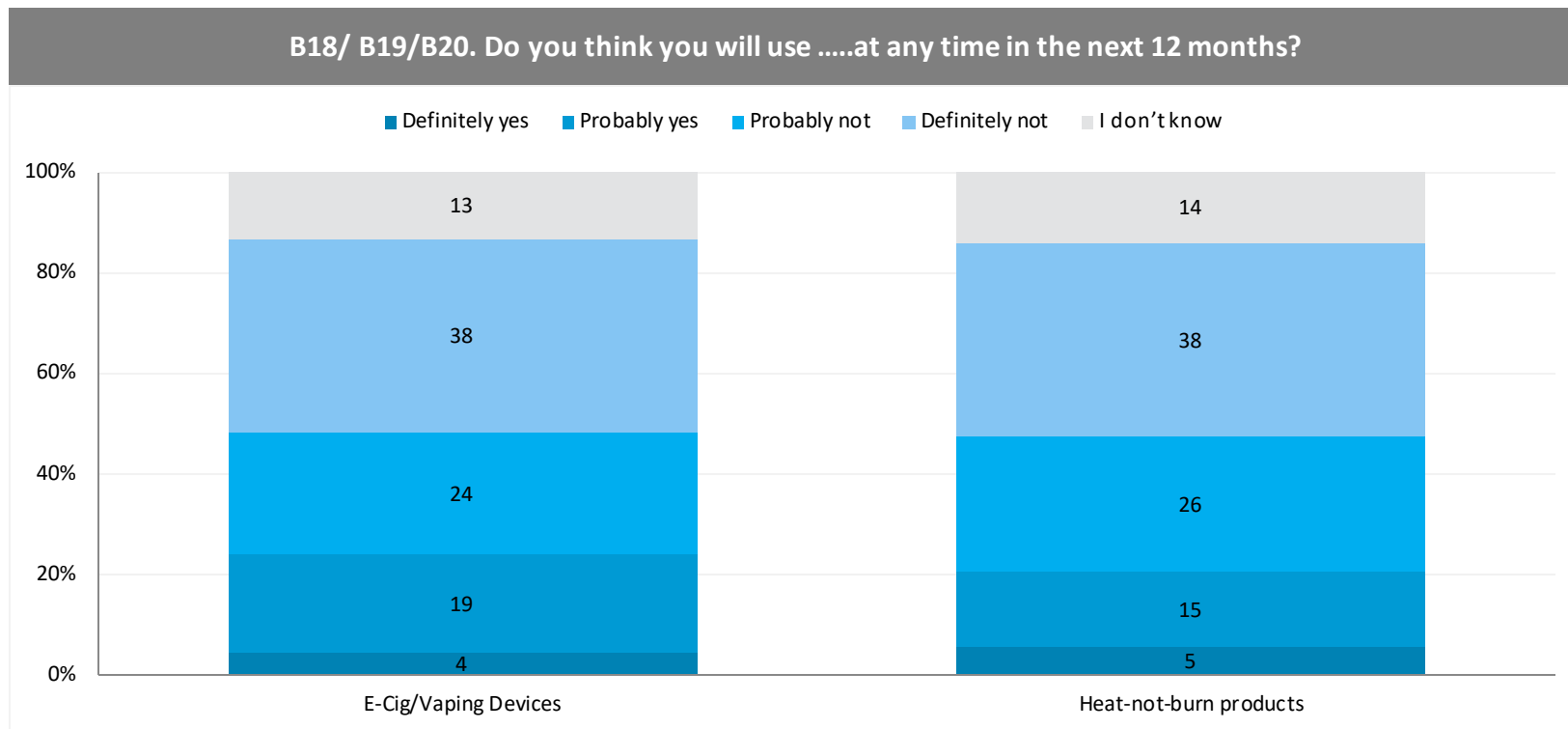
E-Cig Men: n=2392; Women: n=197, non users of Heat-not-burn products Men: n=2392; Women: n=197, non users of smokeless tobacco Men: n=2392; Women:

n=197

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

Use only Smokeless Tobacco Products

Among the solus users of Smokeless Tobacco Products, 20% of them are willing to use Heat-not-burn products in the next 12 months.



in %

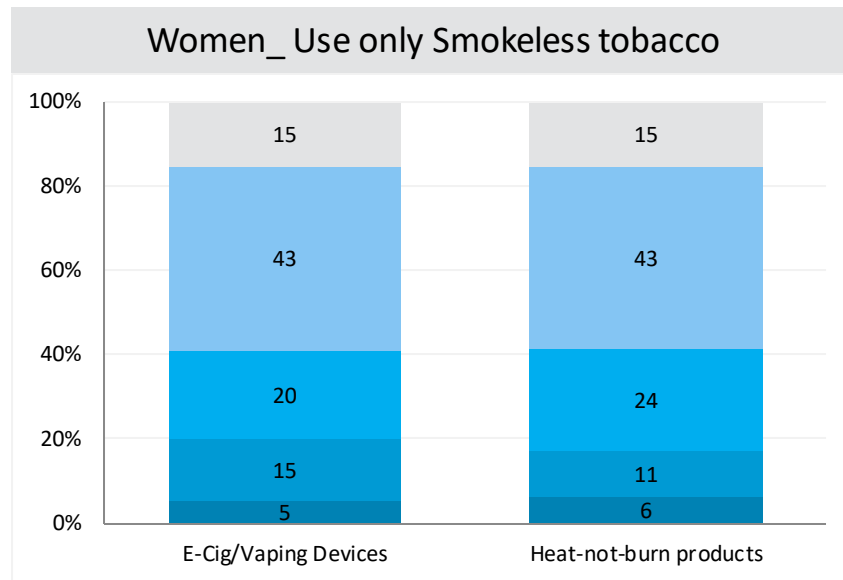
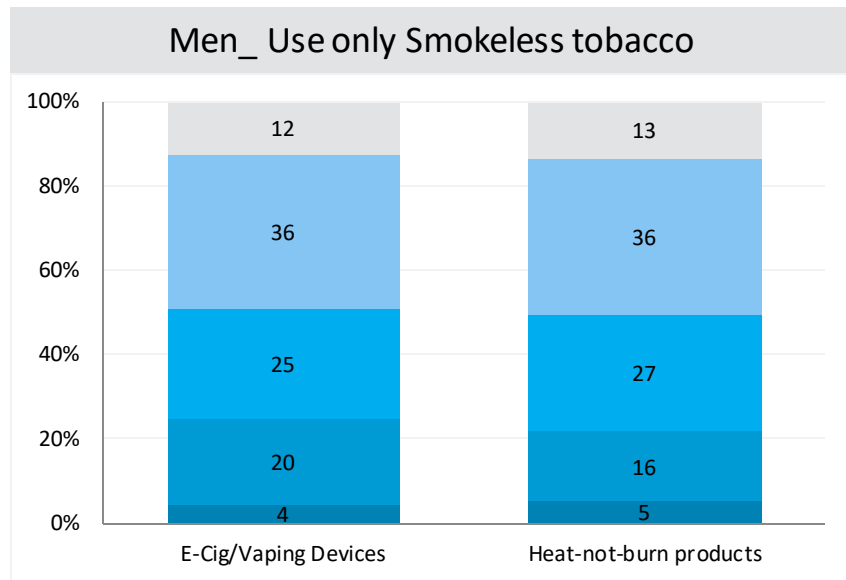
tom + Booster Sample, Current Users _ Use only Smokeless Tobacco products_ Tobacco users/ other product users who are non users of 966, non users of Heat-not-burn products n: 10966, non users of smokeless tobacco n:0

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

Among the Men solus users of Smokeless Tobacco Products, 24% of them are willing to use E-Cig in the next 12 months.

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 %

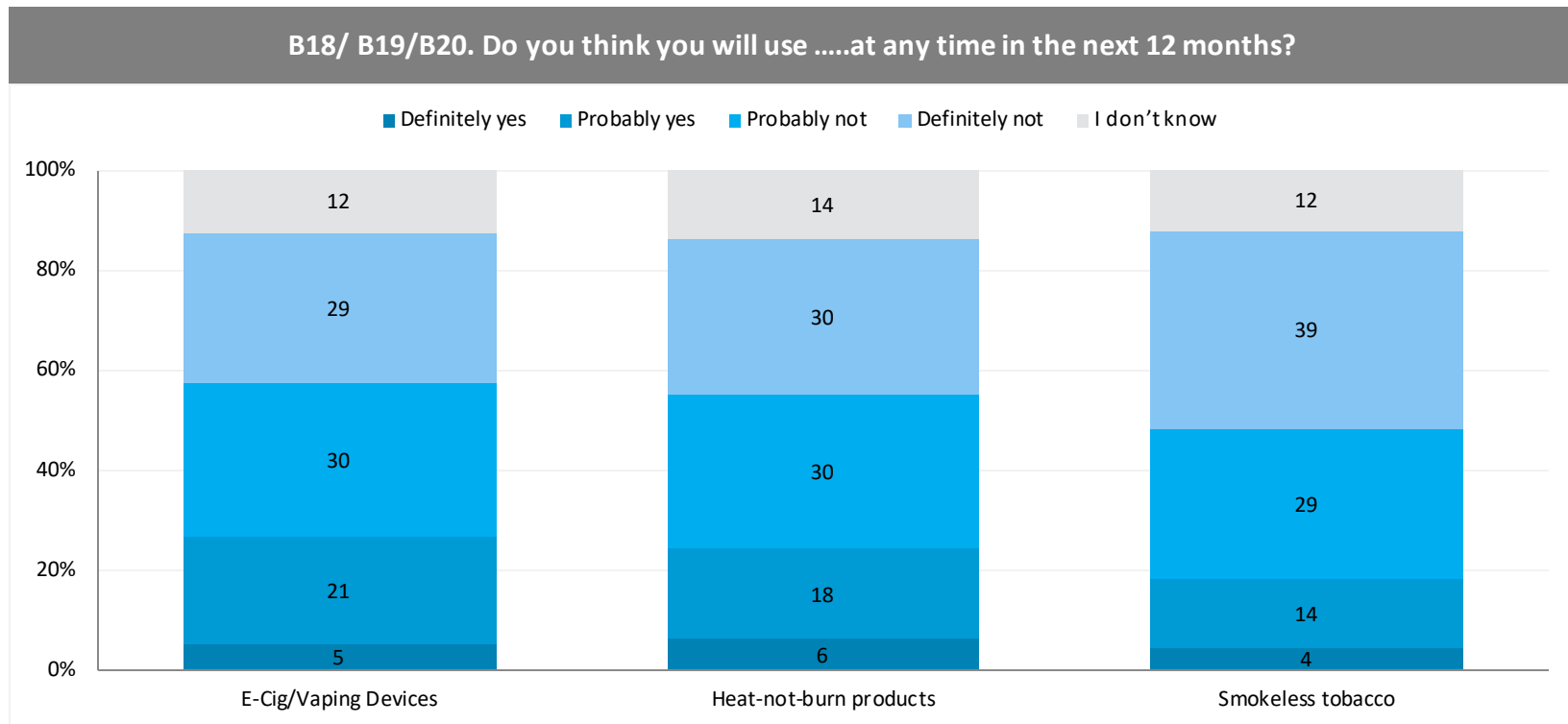
base : Random+ Booster Sample, Current Users_ Use only Smokeless Tobacco products_ Tobacco users/ other product users who are non users of

:- Cig Men: n=8165 Women: n=2801, non users of Heat-not-burn products Men: n=8165 Women: n=2801, non users of smokeless tobacco Men: n=0, Women n=0

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

Dual/ Poly Users

Among the Dual/Poly users, 24% of them are willing to use Heat-not-burn products in the next 12 months.



%

+ Booster Sample, Tobacco users/ other product users who are non users of E-Cig n: 7701, non users of Heat-not-burn products n: 7743, non users of smokeless tobacco n: 2189

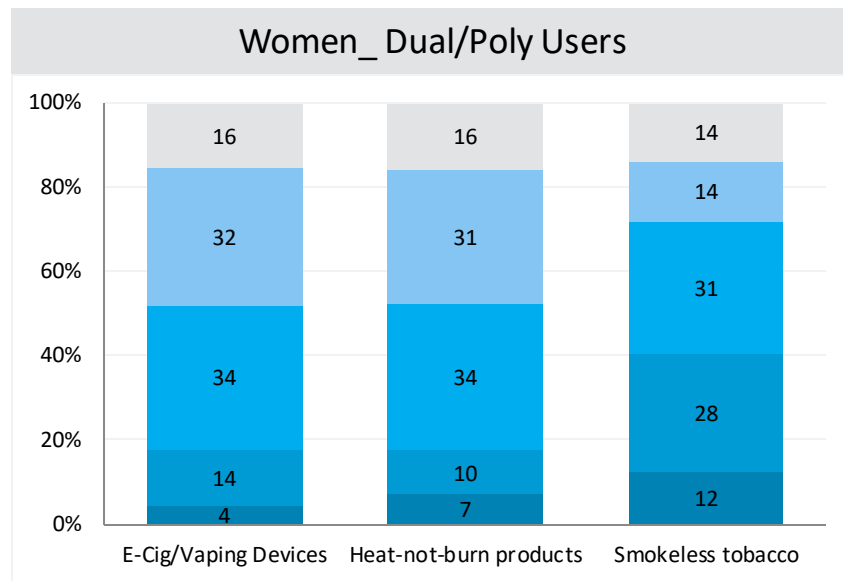
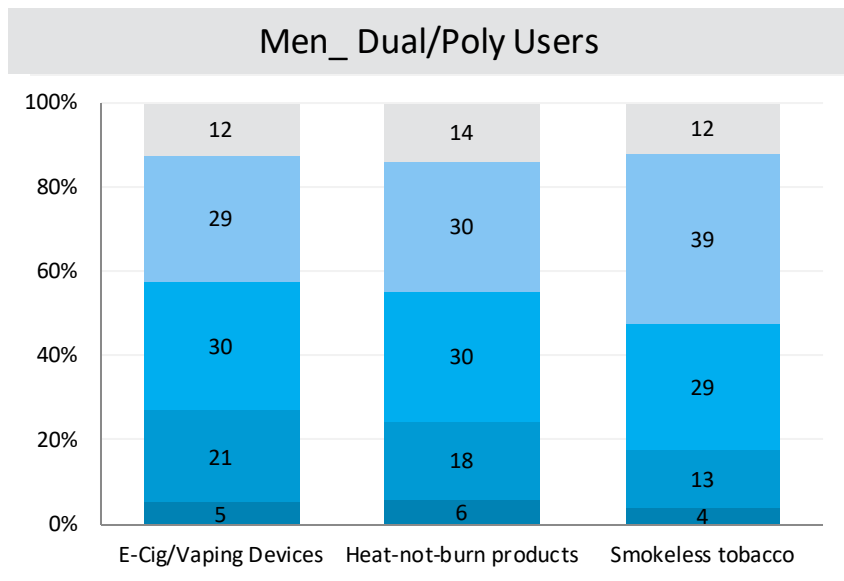
Intention to purchase : E-Cig, Heat-not-burn, Smokeless tobacco

Dual/ Poly Users

Among the Men Dual/Poly users, 26% of them are willing to use E-Cig in the next 12 months.

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 + Booster Sample, Tobacco users/ other product users who are non users of E- Cig Men: n=7338 Women: n=361, non users of Heat-not-burn products Men: n=7380; Women: n=361, non users of smokeless tobacco Men: n=2131; Women n=58

4.3 Quitting and Quitters

Profile Comparison

Relatively more current users are men belonging to the age group of 18 – 35 years. Whereas, quitters are more among women and in the age group of 51 – 69 years.

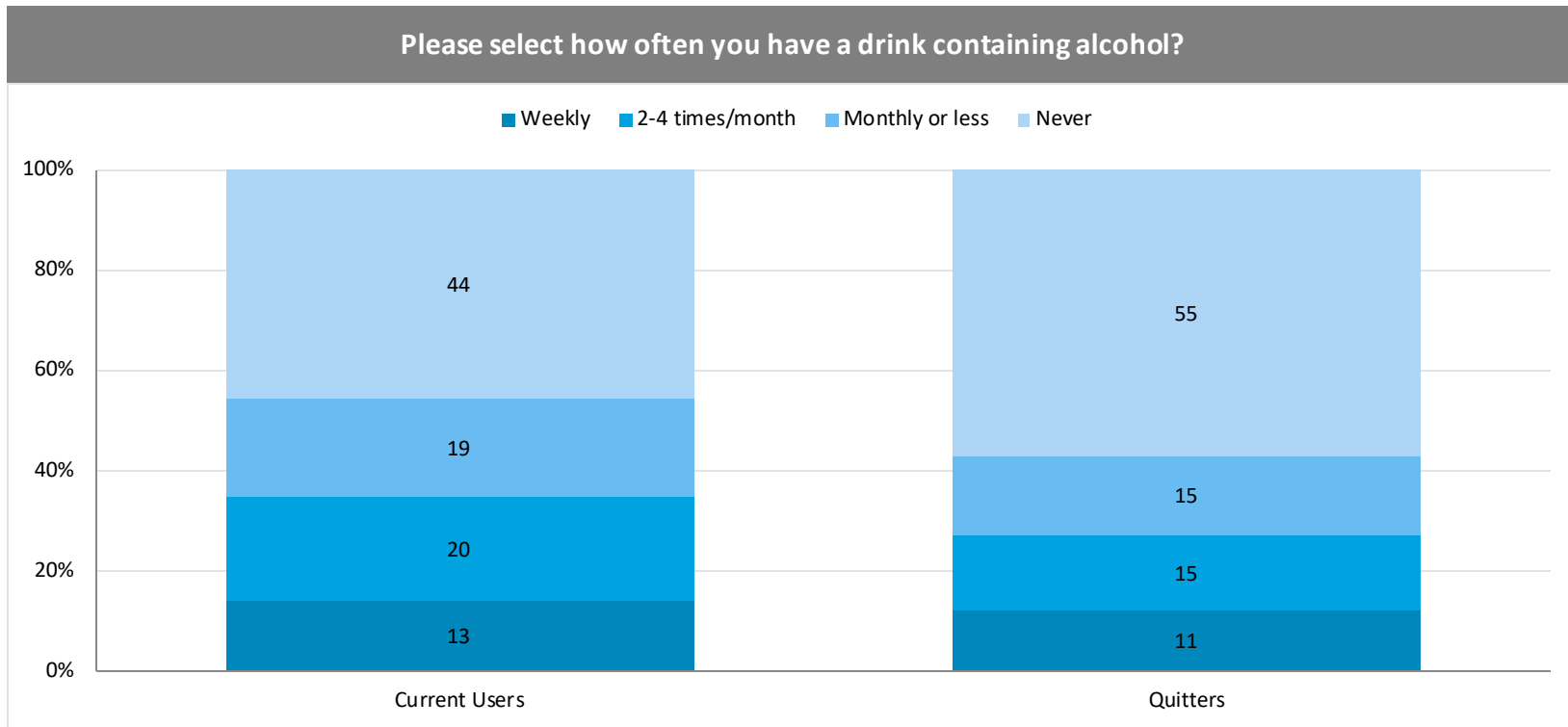
D1/S3.2/D4b Profile of current users and quitters		
	Current users of Tobacco Products	Quitters (who quit tobacco in last 5 years)
Base	35526	6147
Men	88	71
Women	12	29
18-24 yrs	22	13
25-35yrs	37	27
36-50yrs	27	29
51- 69 yrs	13	32
Metro + Town Class 1	45	47
Town Class 2 + Town Class 3	31	30
Rural	24	23

Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products : n= 35526, Quitters n=6147

Comparison between Among Current Users of Tobacco Products & Quitters

Alcohol consumption frequency (weekly) is similar among both current users of Tobacco products and quitters.



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

Percentage in %

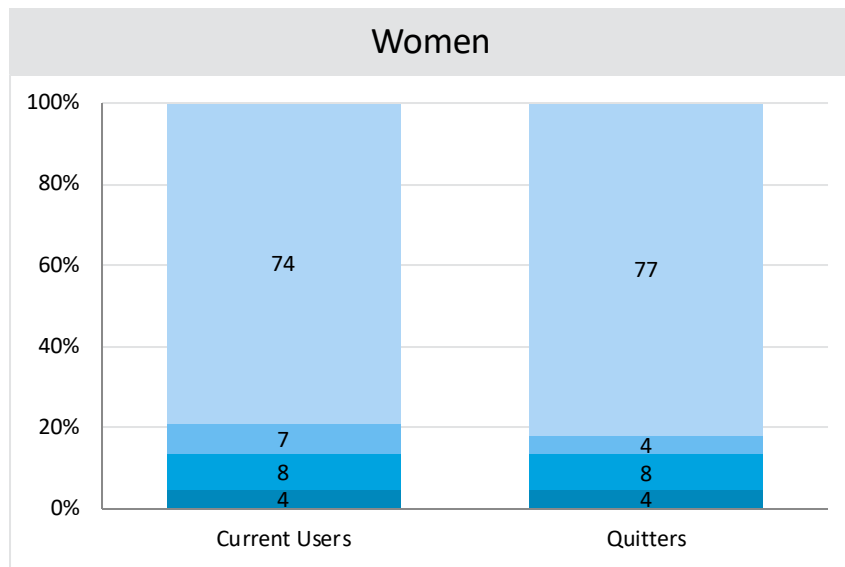
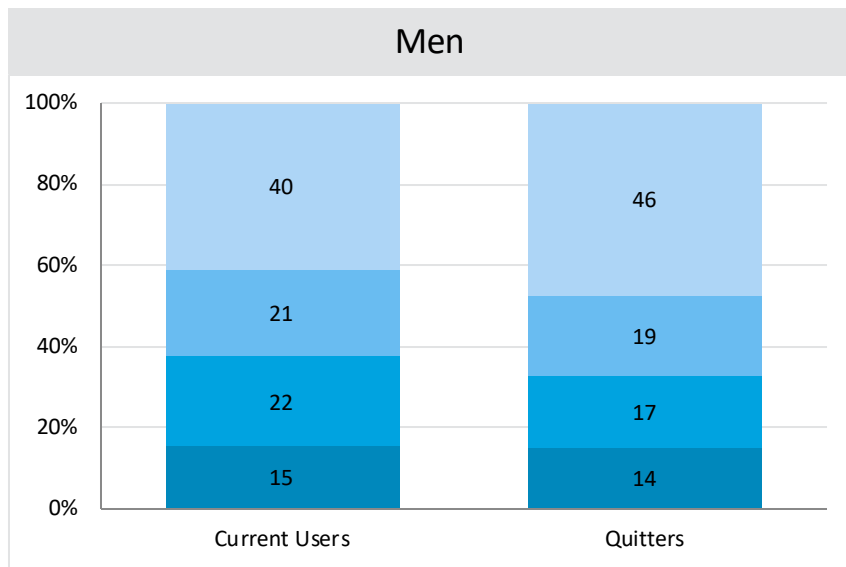
Sample: Random + Booster Sample, Current Users of tobacco products : n= 35526, Quitters n=6147

Comparison between Among Current Users of Tobacco Products & Quitters

Among both men and women, alcohol consumption frequency (weekly) is similar among both current users of tobacco products and quitters. 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 + Booster Sample, Current Users of tobacco products Men : n=31150 Women : n=4374, Quitters Men : n=4363 Women : n=1784

Usage Comparison

Similar level of products usage among current users and quitters; indicating quitting is happening across products.

C1. Of the following products, which products are you currently consuming/were consuming?		
	Current users of Tobacco Products	Quitters (who quit tobacco in last 5 years)
Base	35526	6147
Cigarettes	54	48
Gutka	34	32
Bidis	18	14
Loose Leaf Chewing Tobacco	8	8
Tubed Cigarettes	1	0

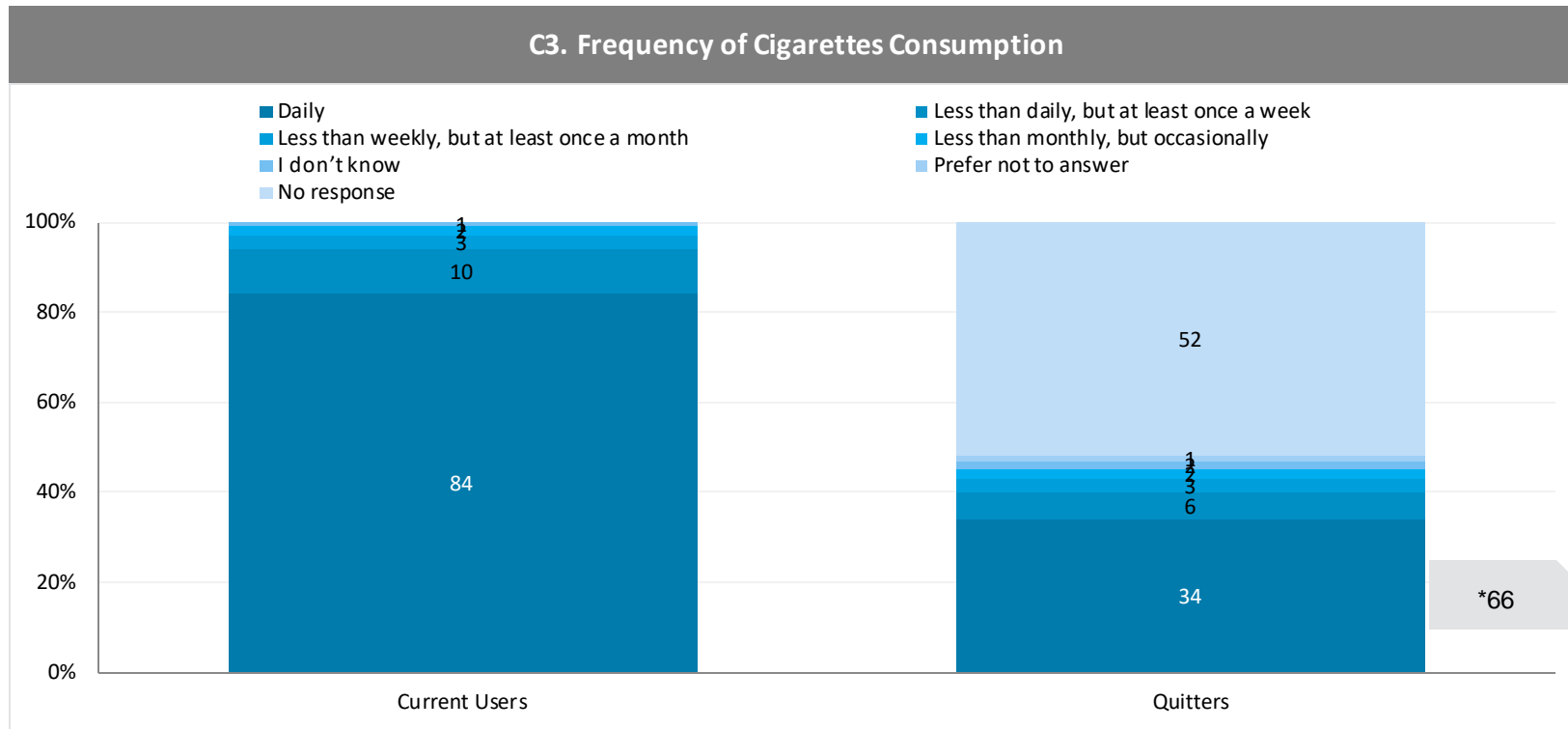
Note: Among Quitters: Data is for past consumption prior to quitting

Figures are in %

Base : Random + Booster Sample, Current Users of tobacco products : 35526, Quitters n=6147

Frequency of Usage Comparison

Among current users of Tobacco Products, daily usage of Cigarettes is higher compared to quitters.

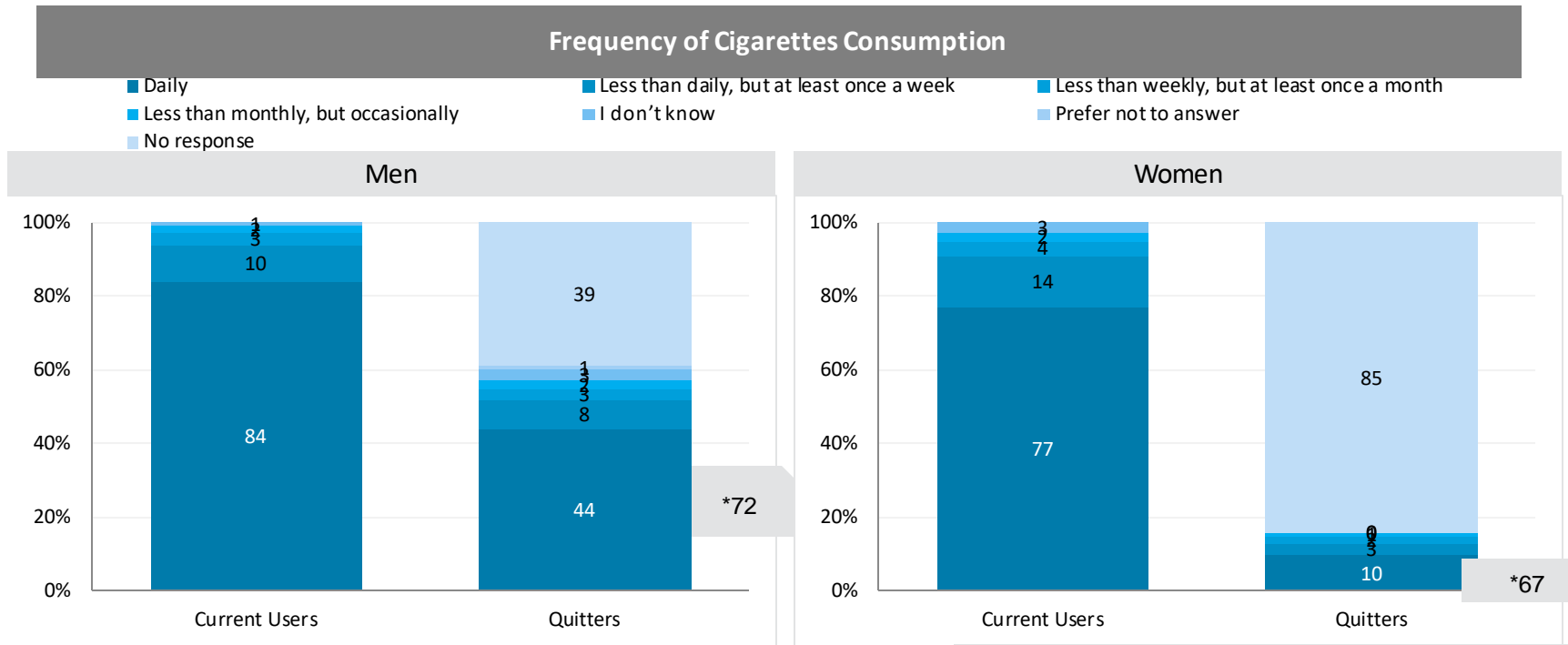


* Daily %among the quitters who have responded

Note: Among Quitters: Data is for past consumption prior to quitting
 %
 n + Booster Sample, Current Users of Cigarettes : n= 19056, Quitters n=6147

Frequency of Usage Comparison

Among both men and women, daily usage of Cigarettes is higher among current users of Tobacco Products compared to quitters.



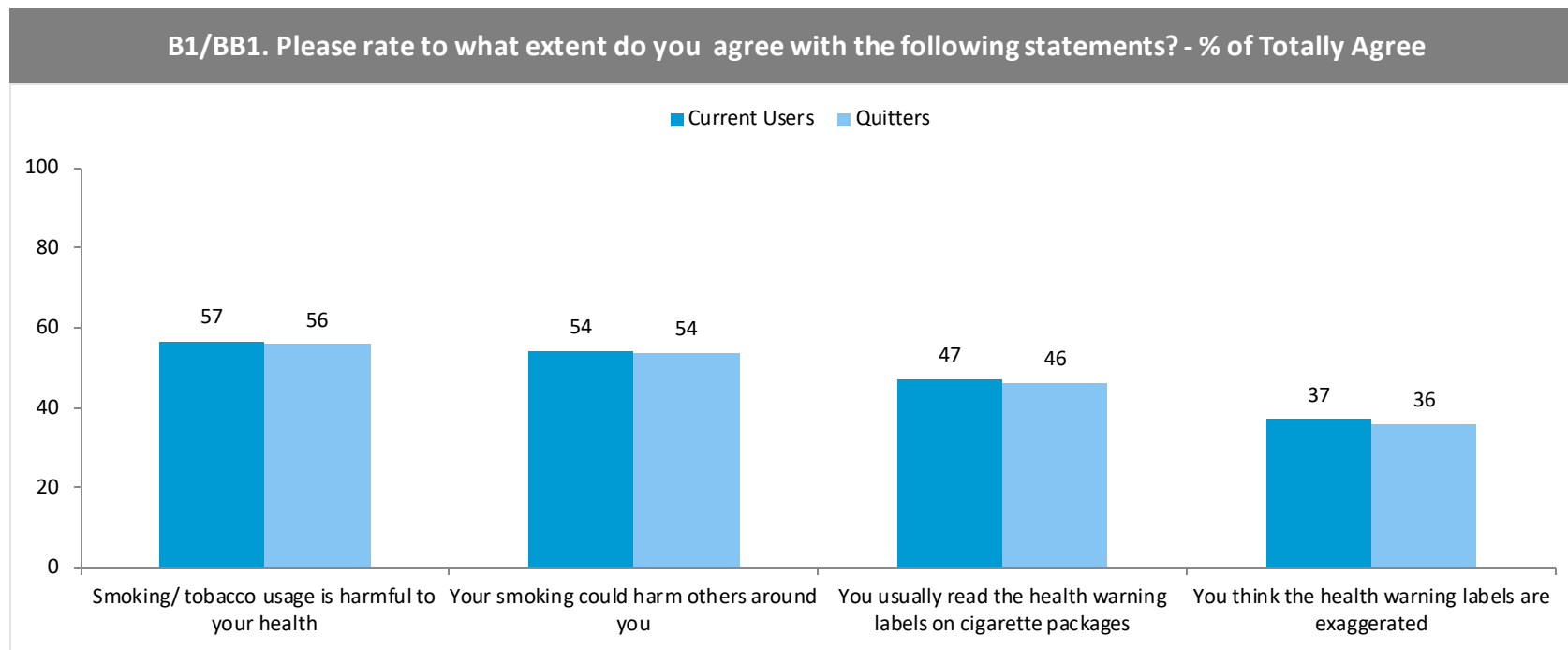
* Daily %among the quitters who have responded

ote: Among Quitters: Data is for past consumption prior to quitting
gures are in %

ise : Random + Booster Sample, Current Users of Cigarettes Men : n = 18223 Women : n = 832, Quitters Men : n = 4363 Women : n = 1784

Risk perception comparison – Current Users of Tobacco Products vs. Quitters

Risk perception is similar for both current users and quitters.



Figures are in %

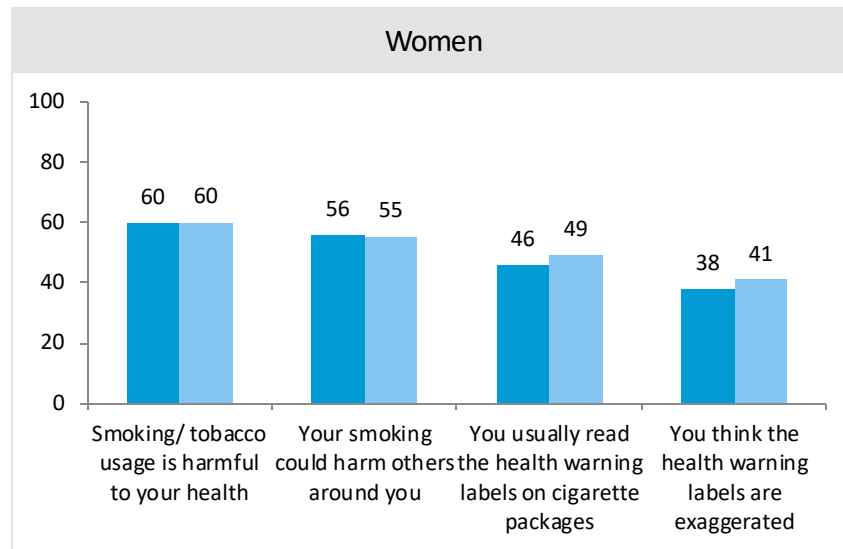
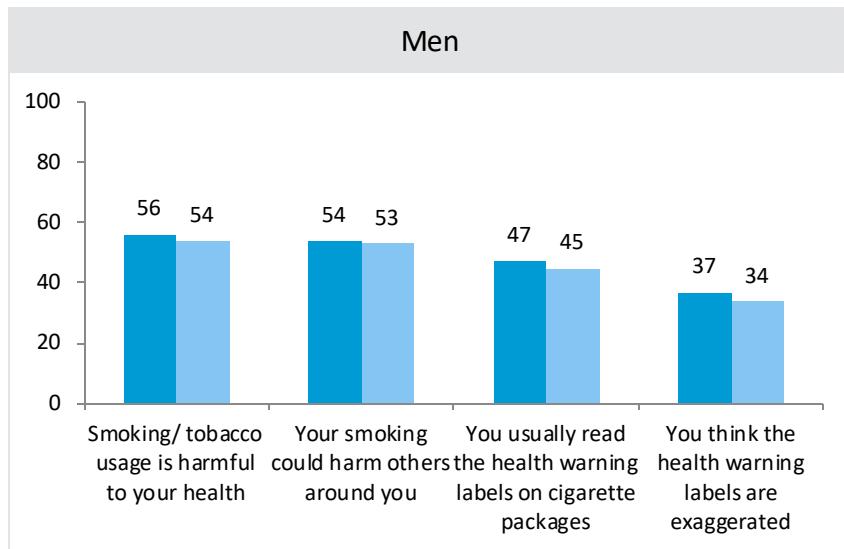
Base : Random+ Booster Sample, Current Users of tobacco products/ other products : n=3526 Quitters : n=6147

Risk perception comparison – Current Users of Tobacco Products vs. Quitters

Among both men and women, risk perception is similar for both current users and quitters.

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

■ Current Users ■ Quitters

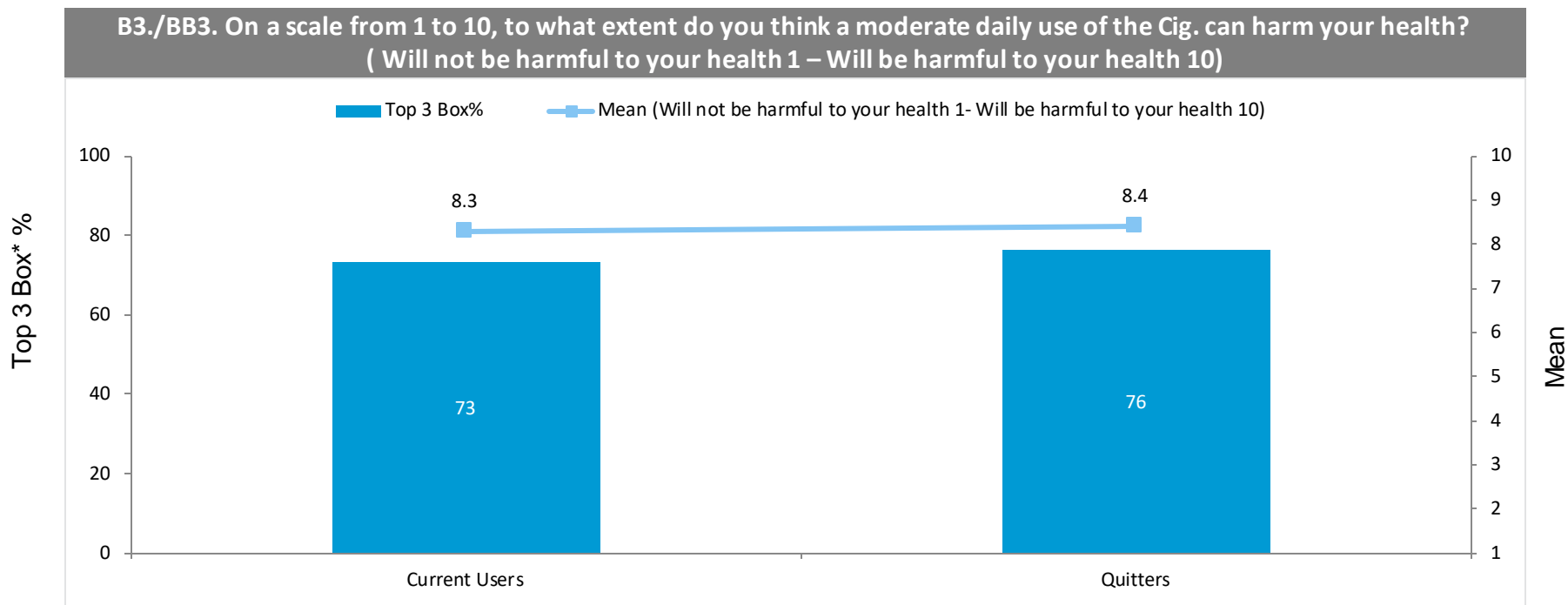


Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products/ other products Men : n=31150 Women : n=4374, Quitters Men : n=4363 Women : n=1784

Risk perception comparison – Current Users of Tobacco Products vs. Quitters

No difference observed in risk perception between current users of Tobacco products and quitters.



*Top 3 Box %: 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)

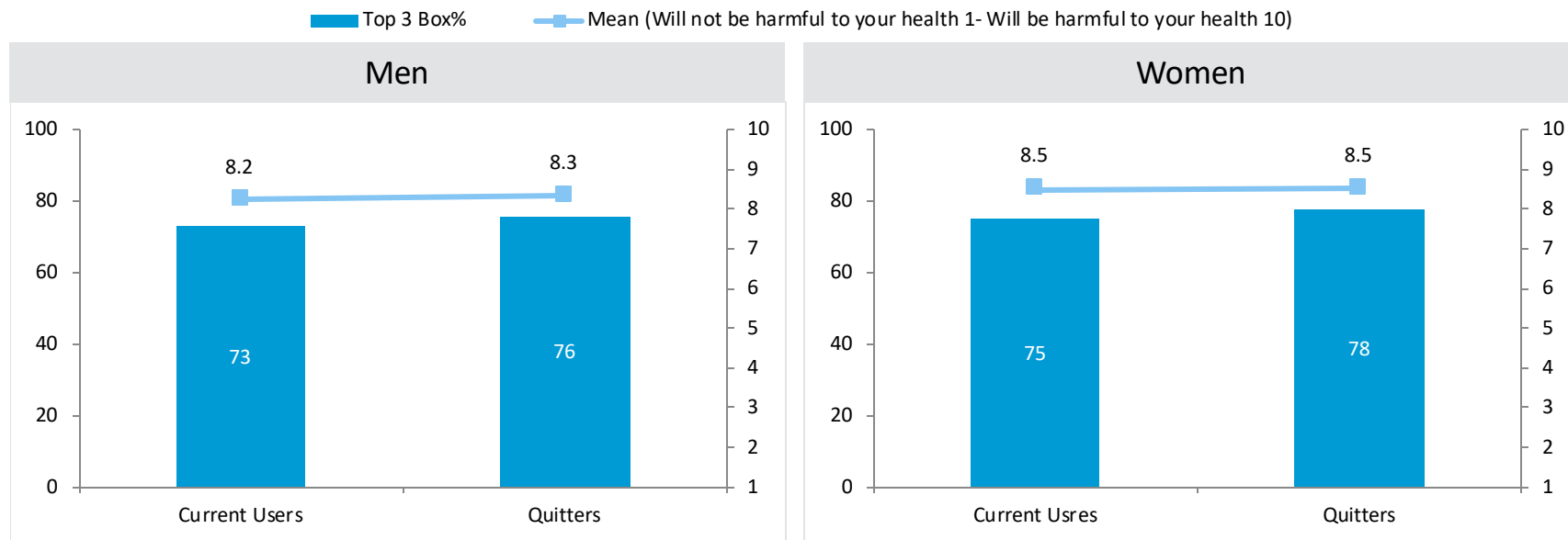
Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products/ other products : n=35526 Quitters : n=6147

Risk perception comparison – Current Users of Tobacco Products vs. Quitters

Among both men and women, no major difference observed in risk perception between current users of tobacco products 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)**



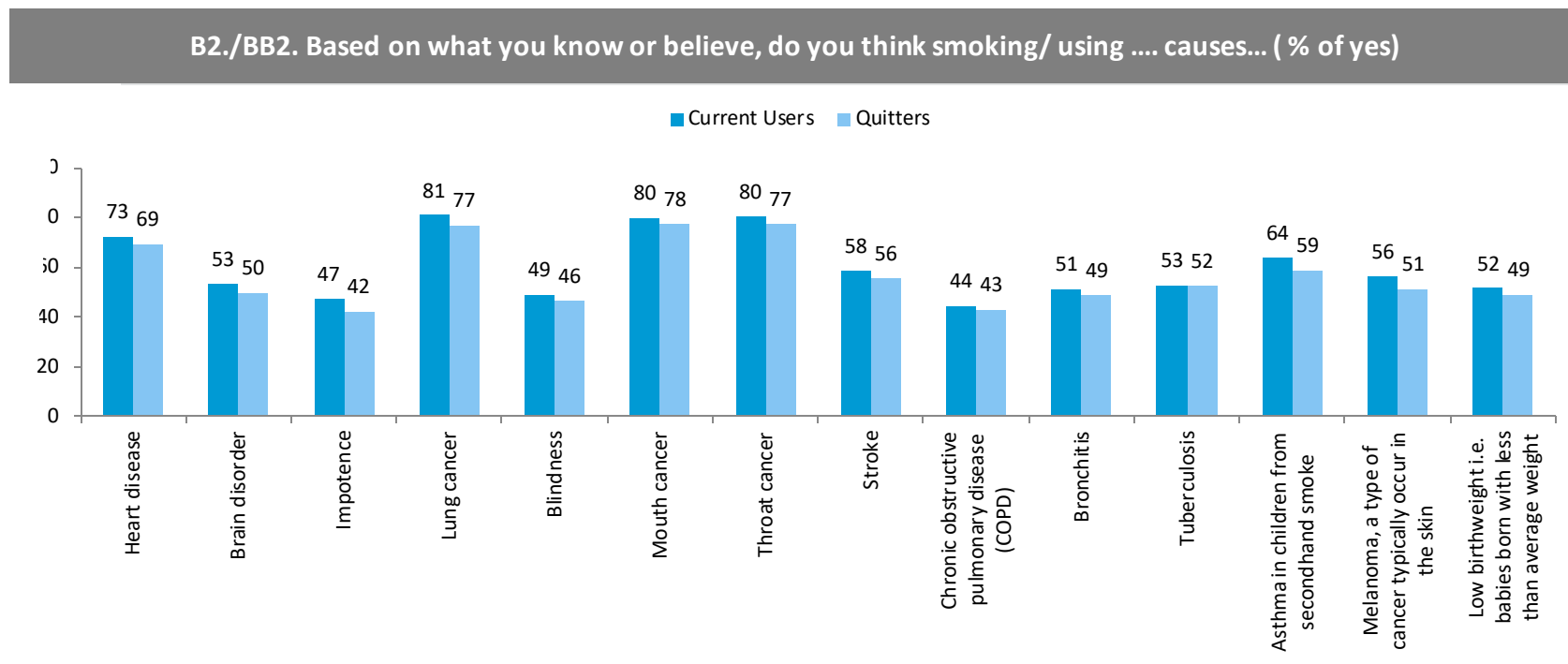
Top 3 Box: Those who coded 8, 9 or 10 (will be harmful to your health)

Figures are in %

Base : Random + Booster Sample, Current Users of tobacco products/ other products Men : n=31150 Women : n=4374, Quitters Men : n=4363 Women : n=1784

Risk perception comparison – Current Users of Tobacco Products vs. Quitters

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

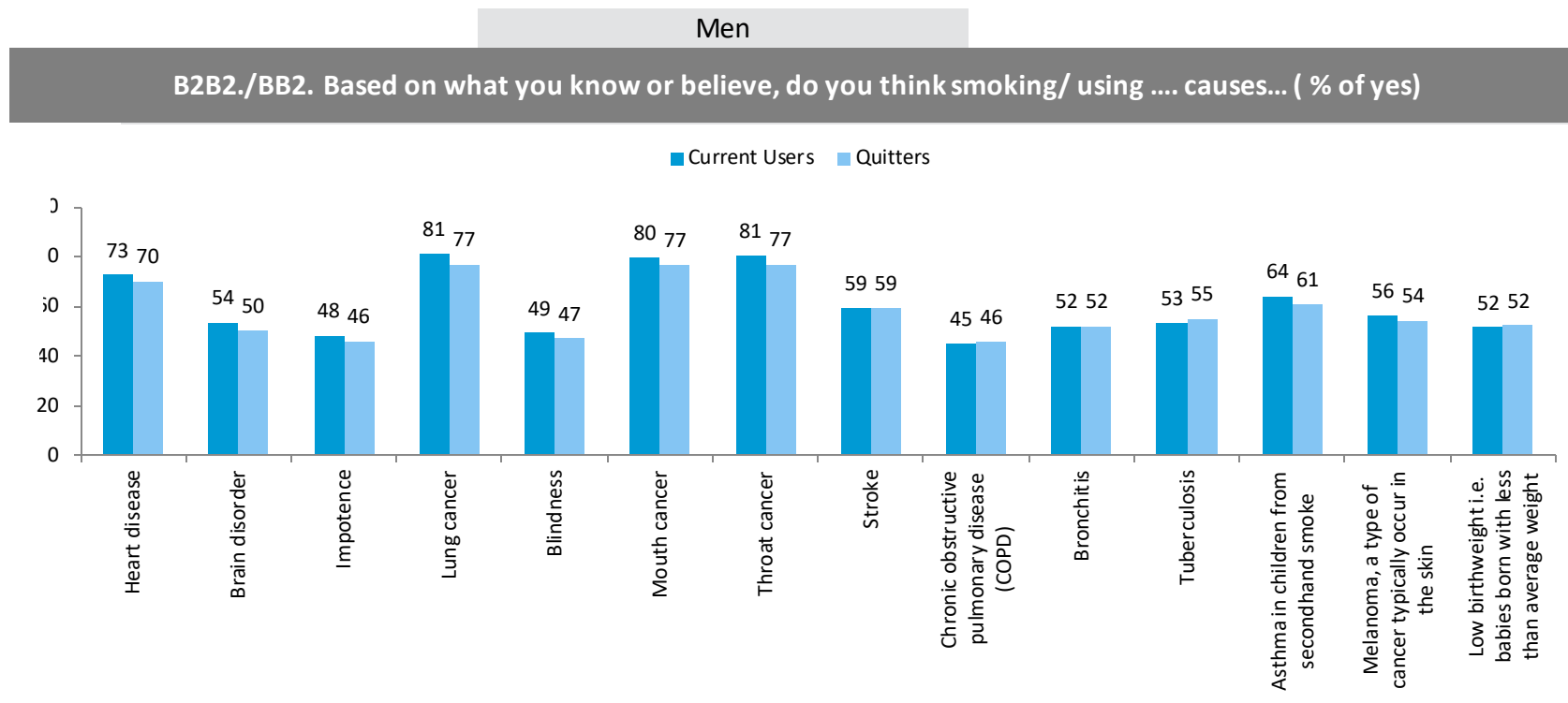


Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products/ other products : n=35526 Quitters : n=6147

Risk perception comparison – Current Users of Tobacco Products vs. Quitters

Among men, a similar level of risk perception noticed between current users and quitters.

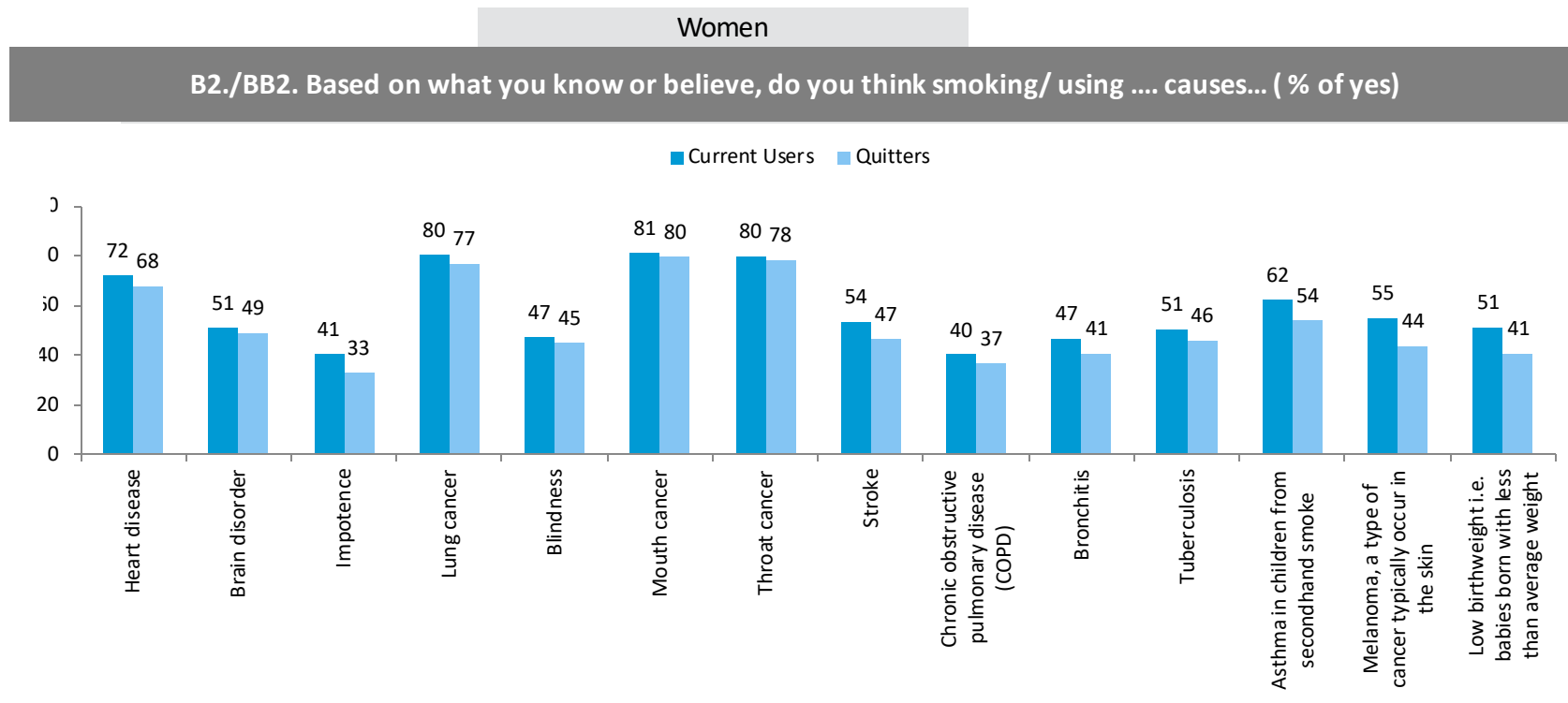


Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products/ other products Men : n= 31150, Quitters Men : n = 4363

Risk perception comparison – Current Users of Tobacco Products vs. Quitters

Among women, the risk perception of Melanoma and Low birthweight was noticed to be higher among current users.



Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products/ other products Women : n=4374, Quitters Women : n=1784

Quit – Past attempt and current plan among Current users of Tobacco Products

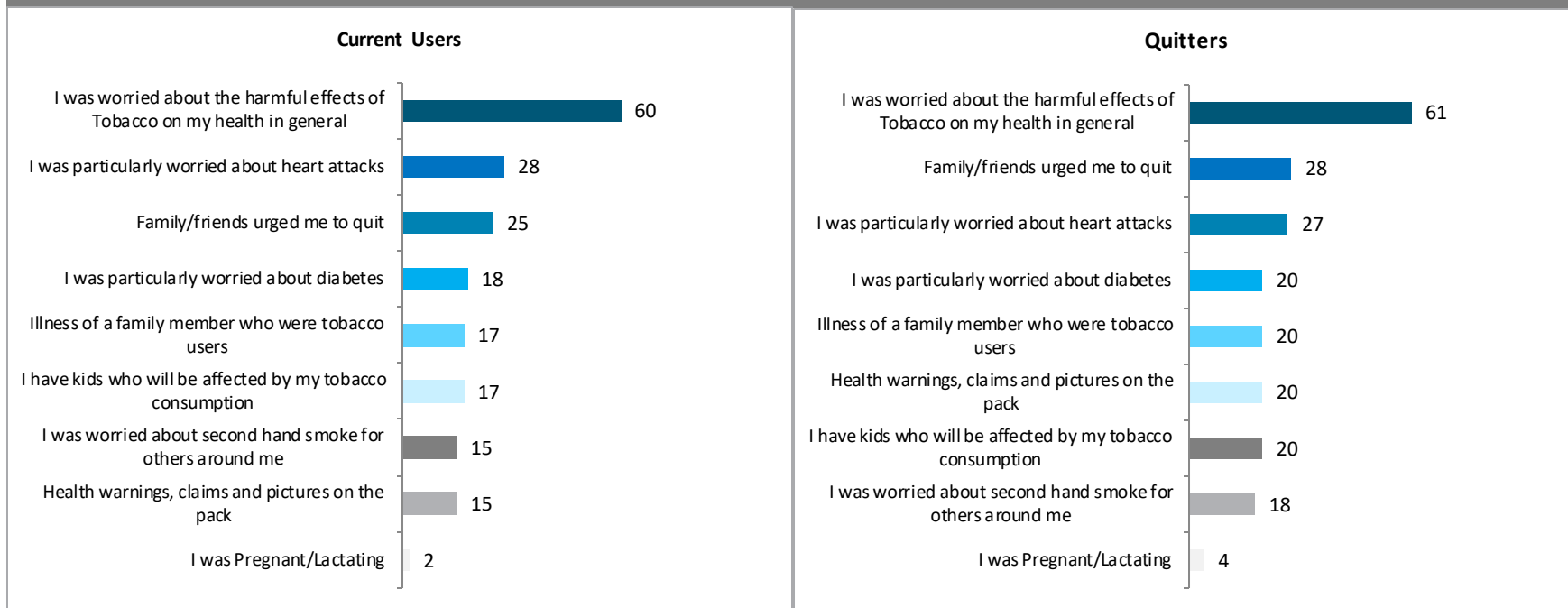
One-half (50%) claimed that they have attempted to quit tobacco/other products. 40% of the Current users of Tobacco products claimed that they are planning to quit.

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
		%	%	%	%	%	%
n	35526	31150	4374	7701	13300	9709	4816
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	50	50	51	50	50	49	49
No	50	50	49	50	50	51	51
B16. Are you planning to quit smoking/ using tobacco products?							
Yes	44	43	50	43	44	44	43
No	44	44	40	42	42	45	47
I don't know	9	10	7	11	10	8	7
I prefer not to answer	3	3	3	4	4	3	2

Reasons For Quitting

Worry about the harmful effects of tobacco on health is the main reason for quitting/ attempt to quit.

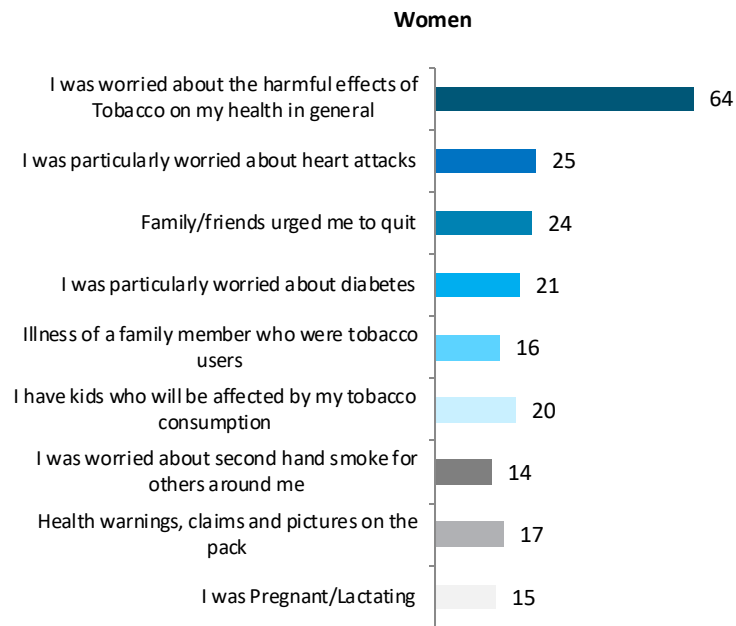
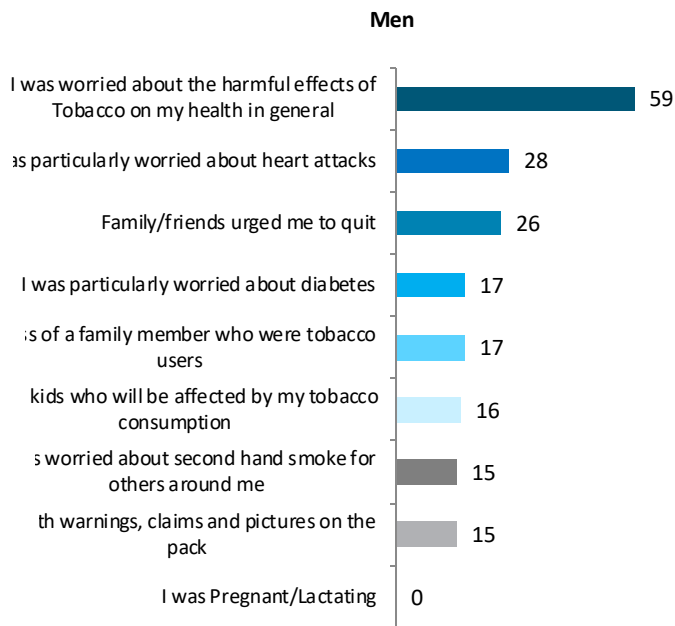
B14.5/ BB 14.5 What were the reasons behind your decision to attempt to quit smoking quitting Tobacco consumption?



Reasons For Quitting - Among Current Users of Tobacco Products

Among both men and women, worry about the harmful effects of tobacco on health is the main reason for attempting to quit.

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



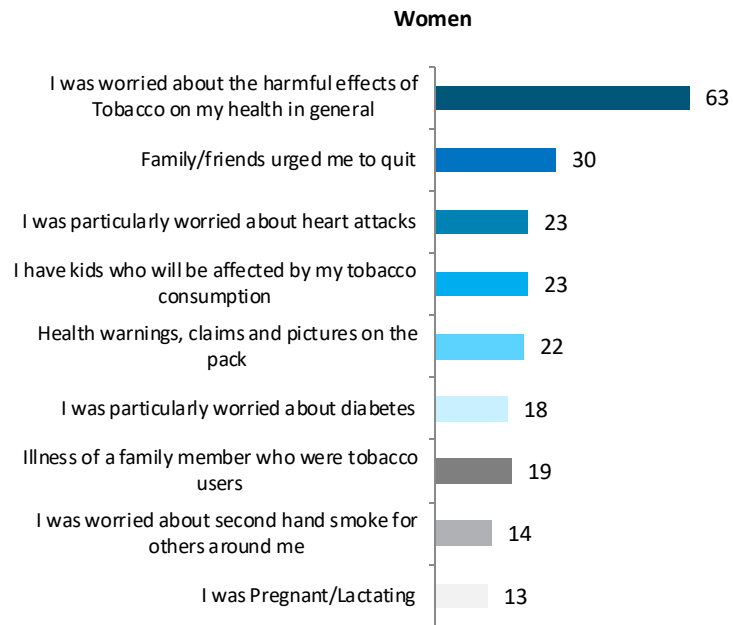
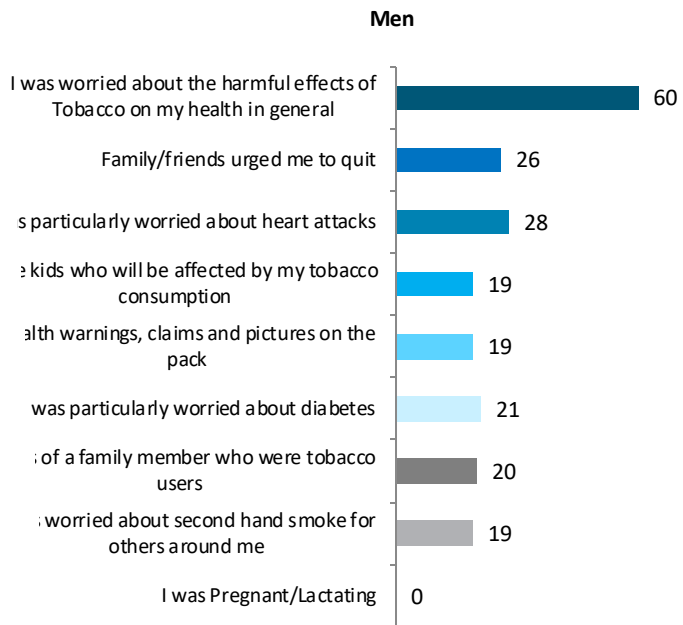
Figures are in %

Base : Random+ Booster Sample, Current Users who attempted to quit Men : n =15469 Women : n=2227

Reasons For Quitting - Among Quitters

Among both men and women, worry about the harmful effects of tobacco on health is one of the main reasons for quitting.

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

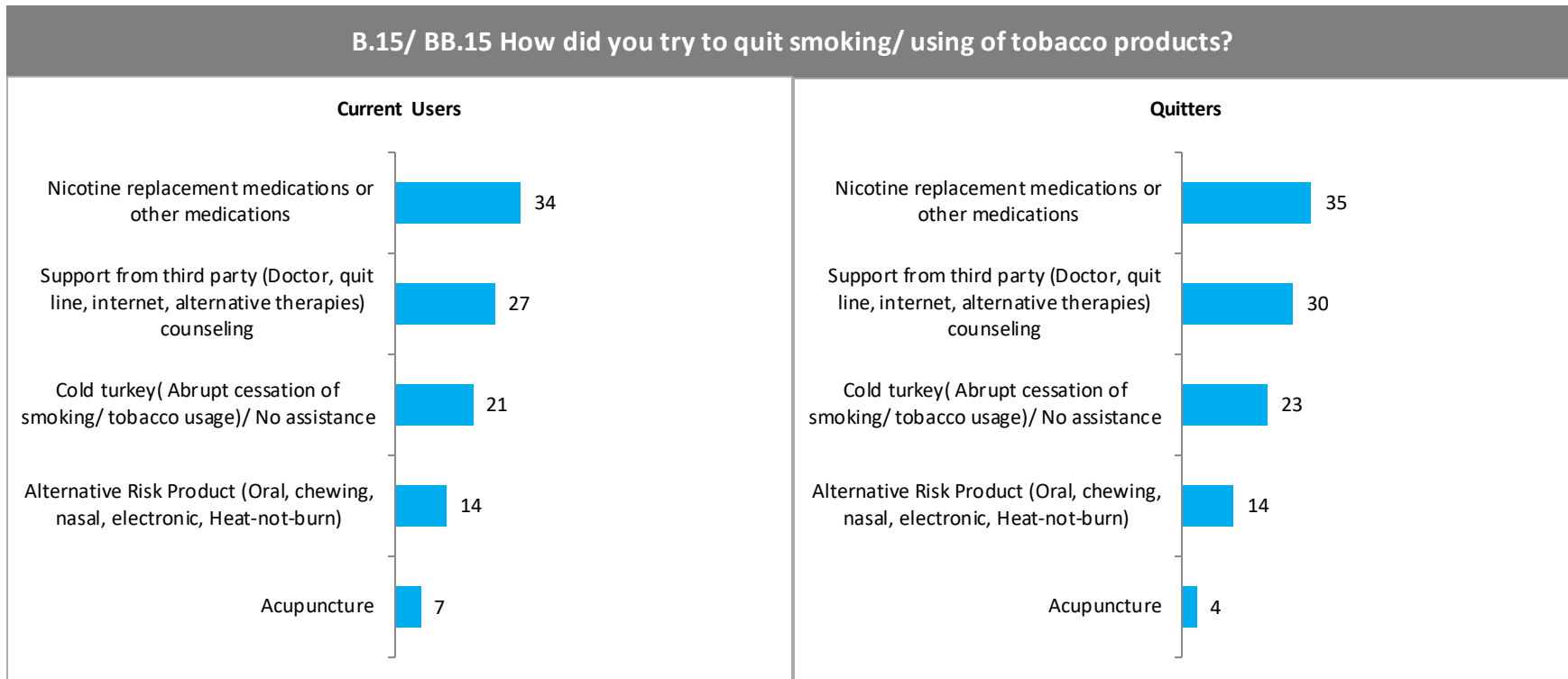


Figures are in %

Base : Random+ Booster Sample, Current Users who attempted to Quitters Men : n = 4363 Women : n=1784

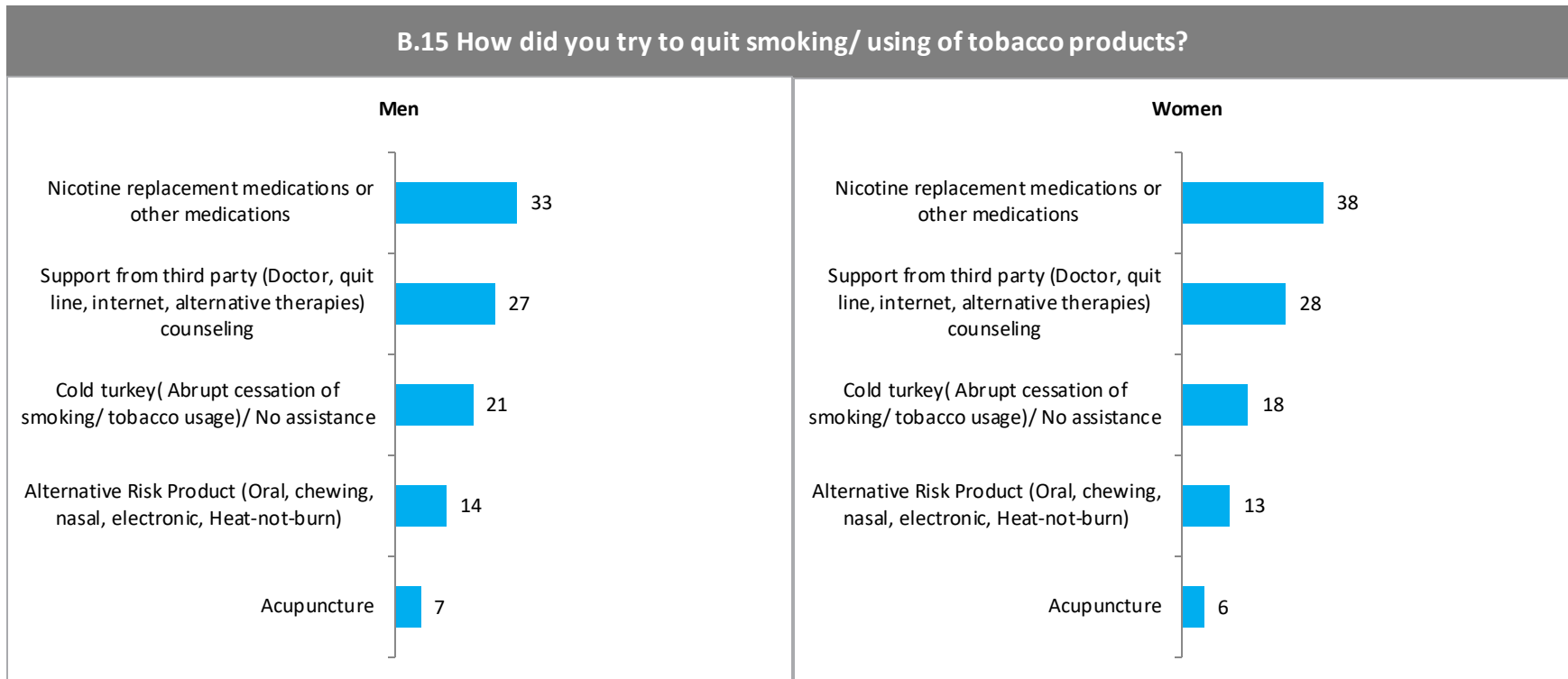
Ways Adapted For Quitting

Nicotine replacement medications followed by support from third-party are the major means of quitting.



Ways Adapted For Quitting - Among Current Users of Tobacco Products

Among both men and women, nicotine replacement medications followed by support from third-party are the major means of quitting.

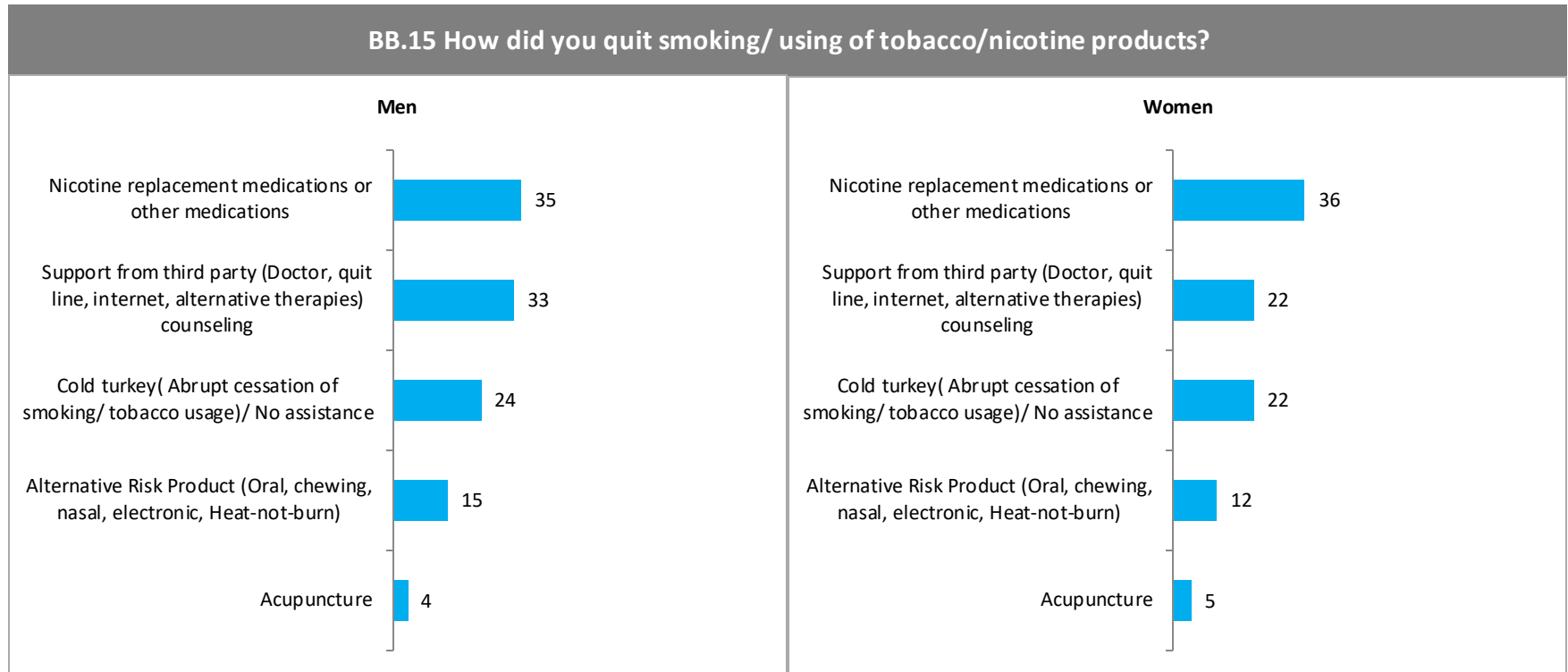


in %

om + Booster Sample,, Current Users who attempted to quit Men : n = 15469 Women : n=2227

Ways Adapted For Quitting - Among Quitters

Among both men and women, nicotine replacement medications followed by support from third-party are the major means of quitting for quitters.



Figures are in %

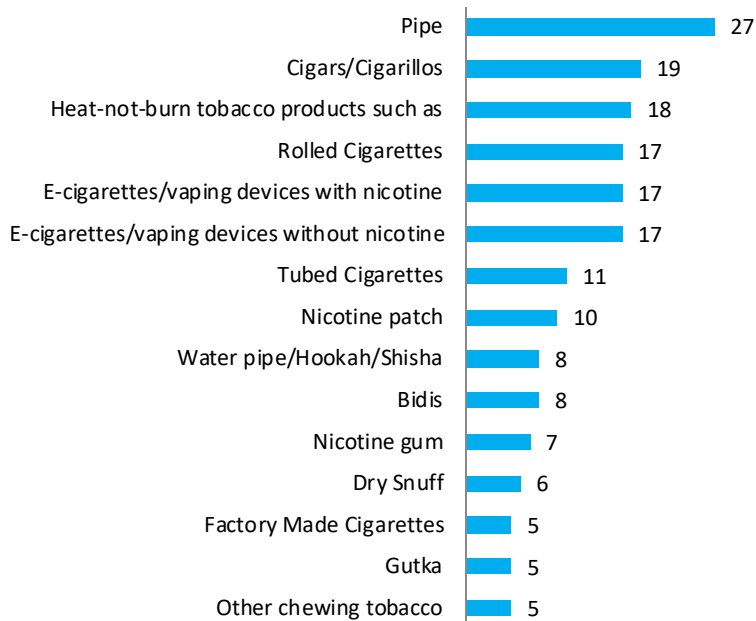
Base : Random+ Booster Sample,, Current Users who attempted to Quitters Men : n = 4363 Women : n = 1784

Quitting Attempts by products : Among Quitters

Across products, multiple numbers of quitting attempts were noticed.

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

Average number of quitting attempts - Among Quitters

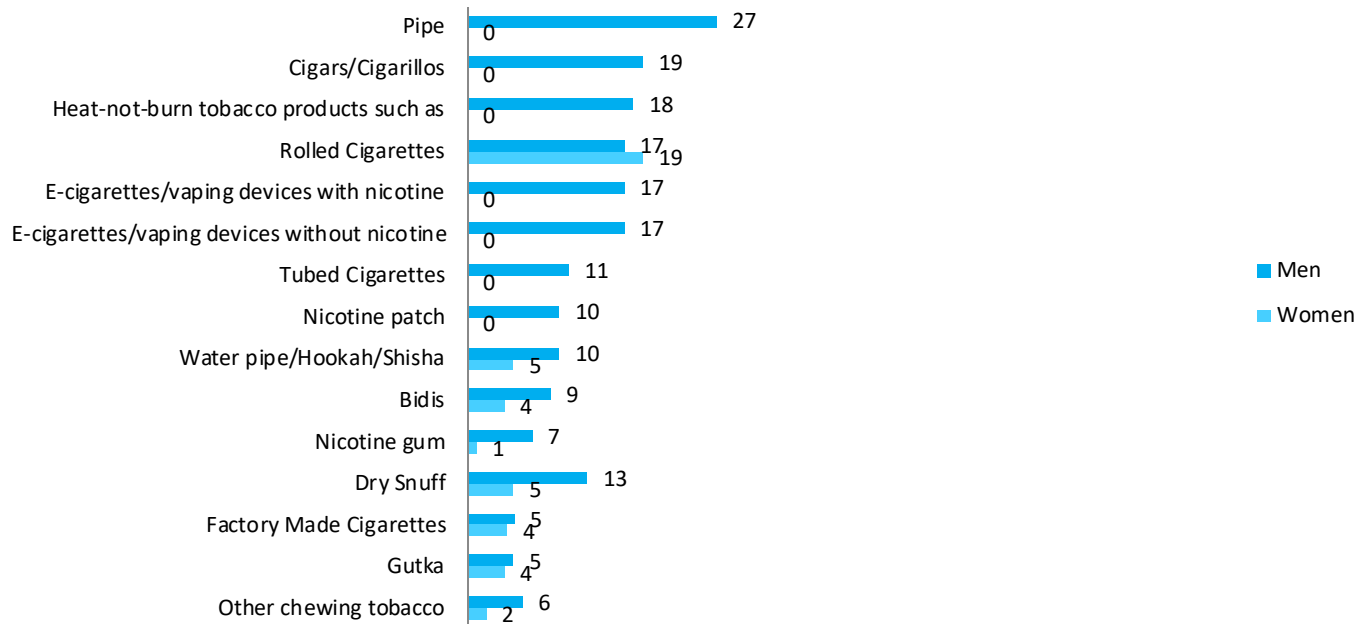


Quitting Attempts by products : Among Quitters

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

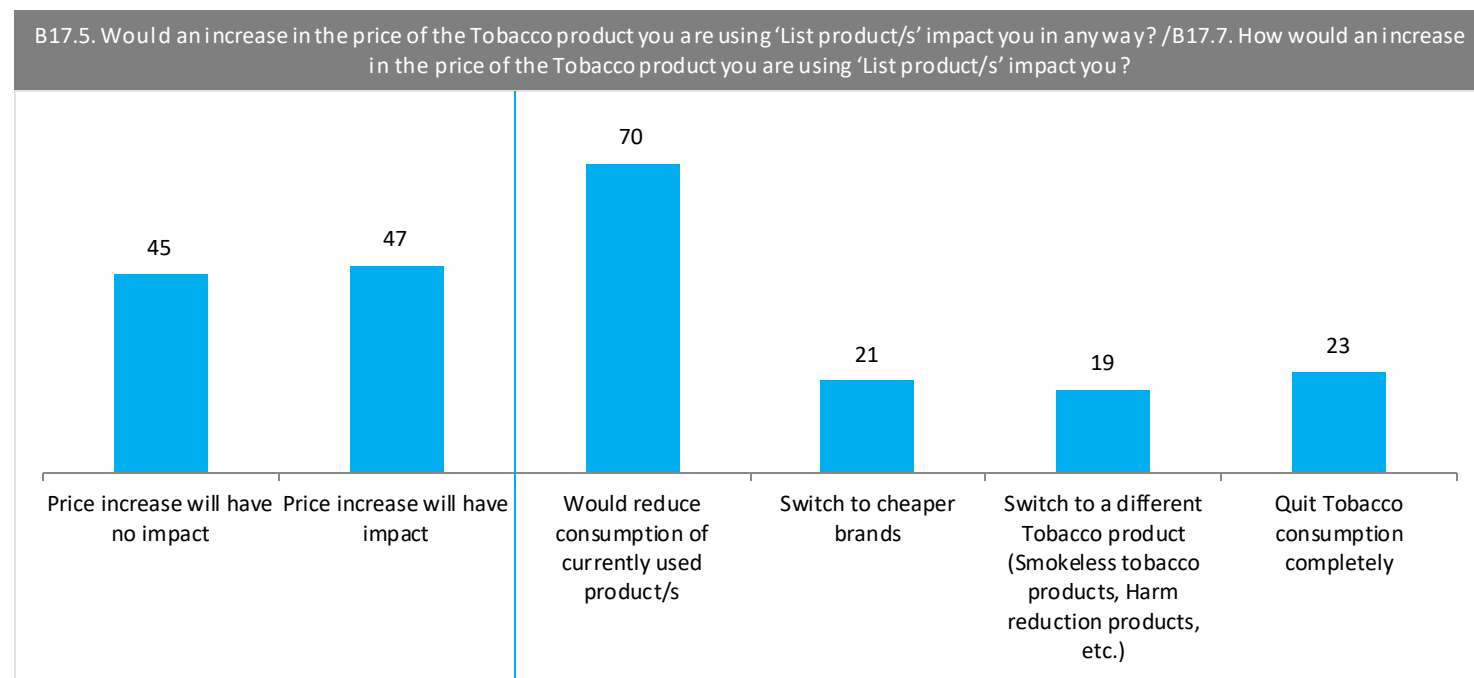
BB14. How many times did you try to quit consuming each of the following products before you succeeded?

Average number of quitting attempts - Among Quitters



Impact of price increase of the tobacco products/other products

47% of the consumer claimed that there will be an impact of the price increase; to cope with the price increase, the majority of them (70%) were planning to reduce consumption.

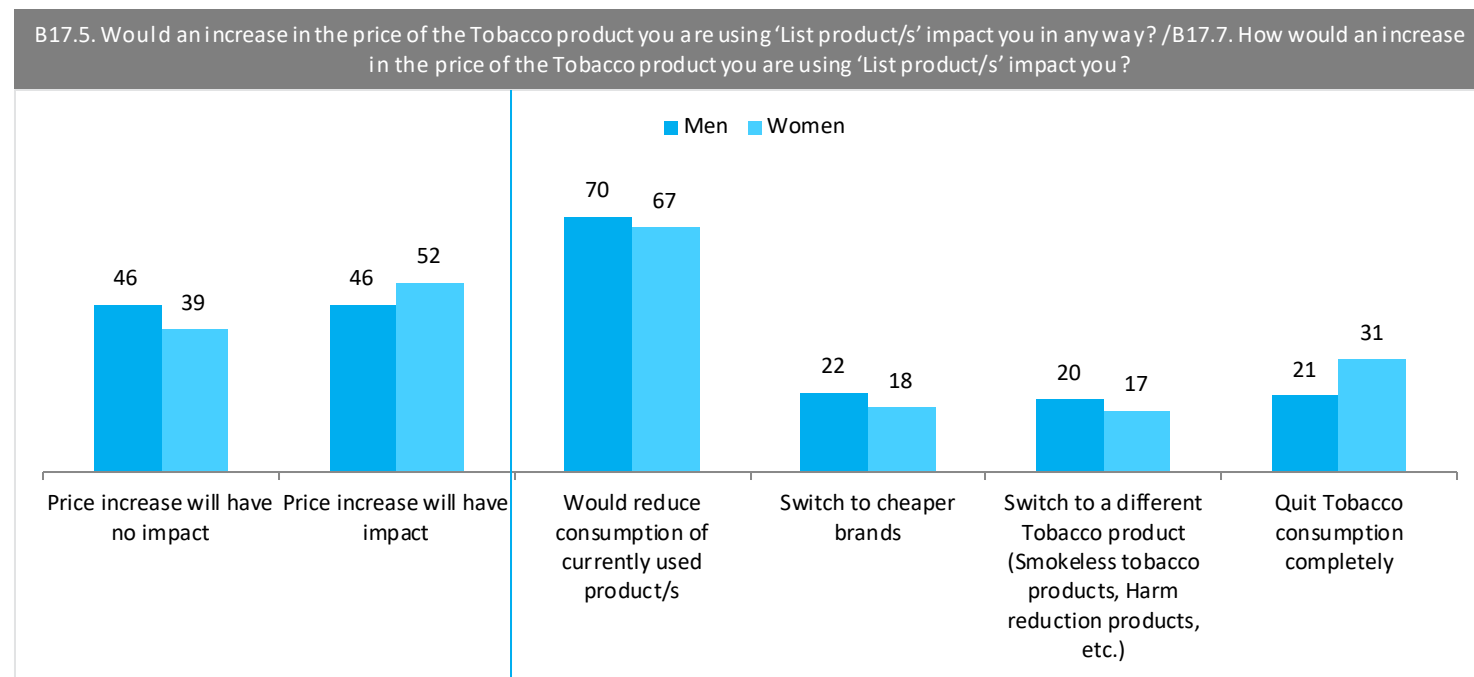


s are in %

Random+ Booster Sample, Current Users of tobacco products who are not planning to quit : n= 35526

Impact of price increase of the tobacco products/other products

Among both men and women, one-half of the 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.

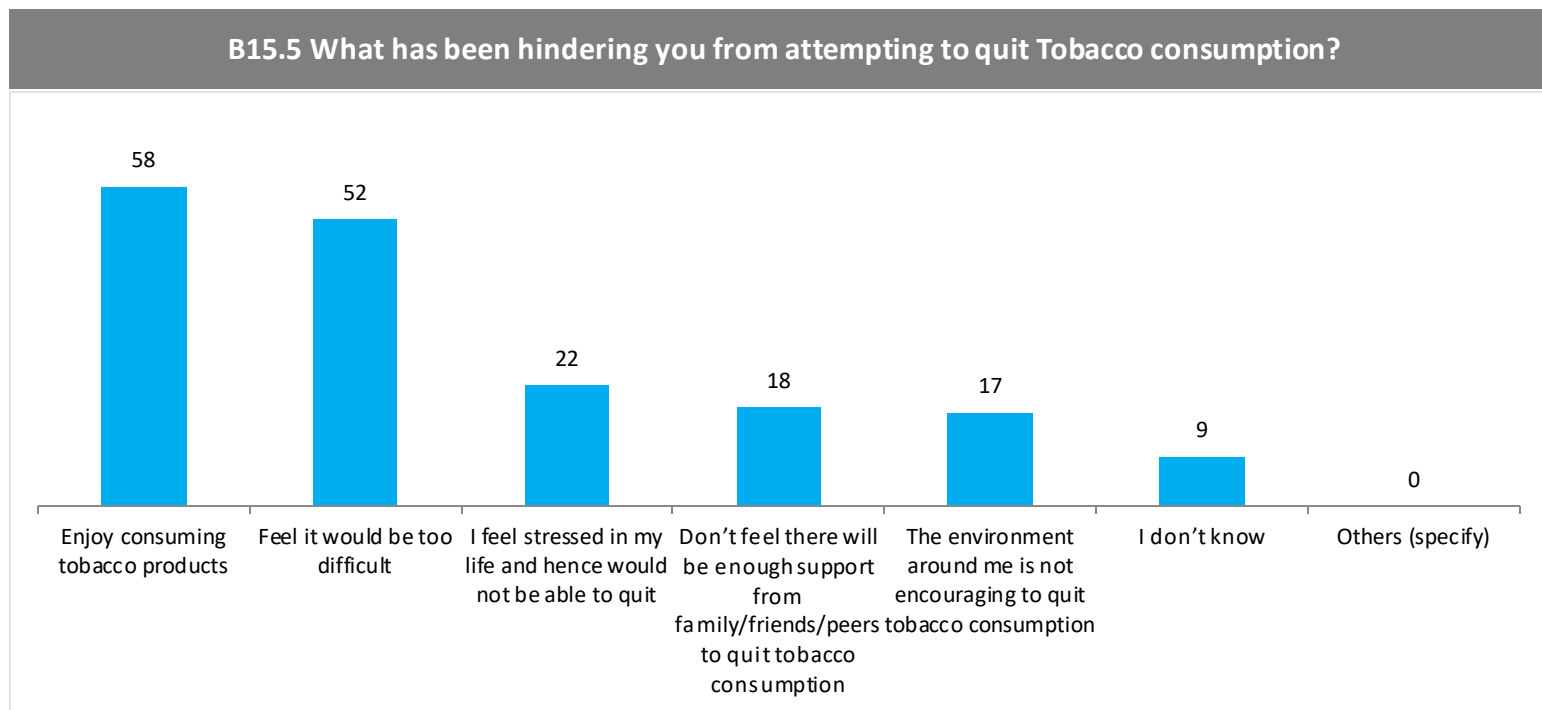


in %

dom + Booster Sample, Current Users of tobacco products who are not planning to quit Men : n=31150 Women: n=4374

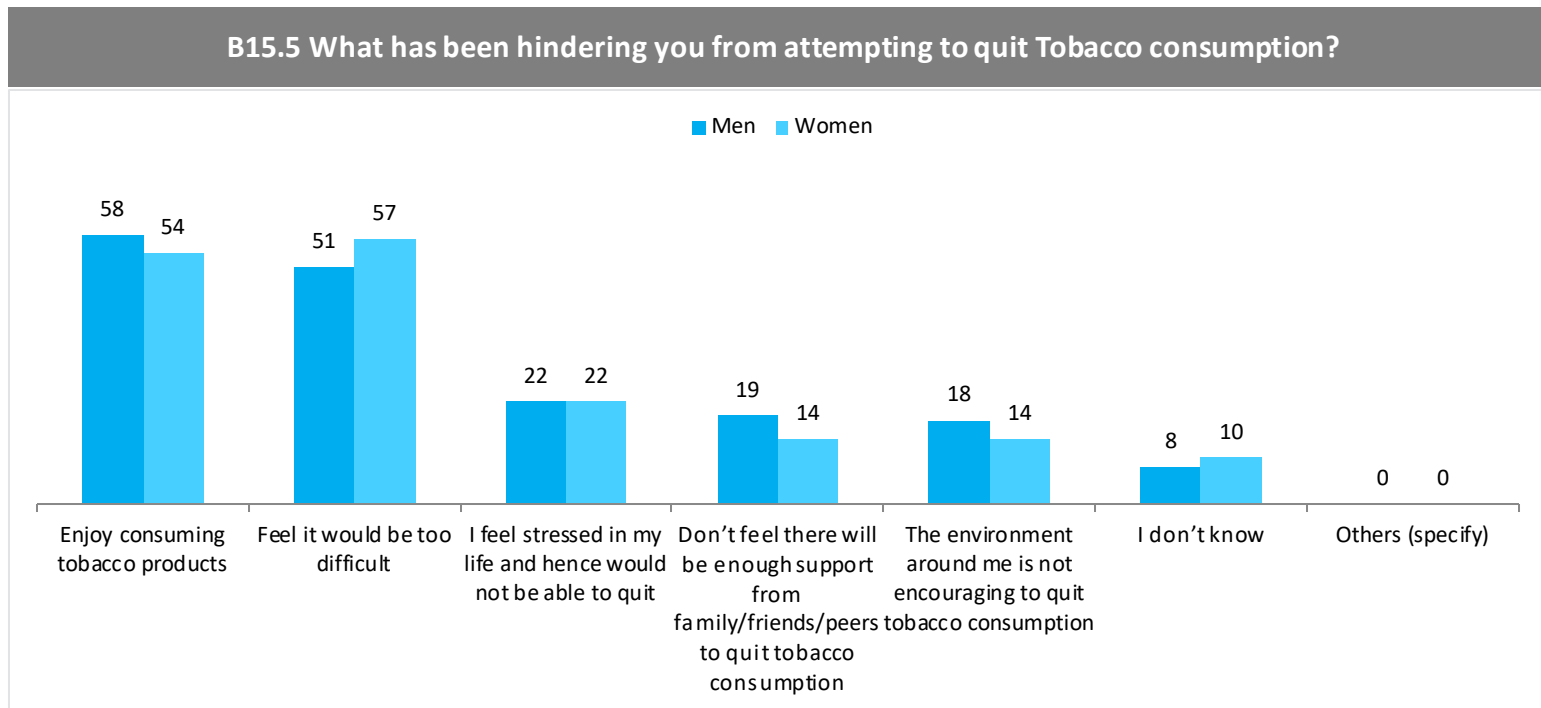
Hindrances in Quitting Tobacco Consumption

Apart from enjoying consuming tobacco products (58%), difficulty to quit (52%) surfaced as one of the main hindrances to quit.



Hindrances in Quitting Tobacco Consumption

Among both men and women, apart from enjoying consuming tobacco products, difficulty to quit surfaced as one of the main hindrances to quit.



5. Appendix

Profile Comparison

Profile of Current Users and Quitters				
	Current users of Tobacco Products		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Education	31150	4374	4363	1784
Less than high school	38	59	36	54
Completed some high school	22	15	21	15
High school graduate	17	11	20	13
Job-specific training program(s) after high school	2	1	2	2
Some college, but no degree	5	2	6	3
Associate degree	2	2	1	4
Bachelor's degree (such as B.A., B.S.)	10	4	10	5
Some graduate school, but no degree	1	1	1	0
Graduate degree (such as MBA, MS, M.D., Ph.D.)	2	1	2	1

Figures are in %

Base : Random + Booster Sample, Current Users of tobacco products Men : n=31150 Women : n=4374, Quitters Men : n = 4363 Women : n=1784

Profile Comparison

Profile of Current Users and Quitters				
	Current users of Tobacco Products		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Civil Status	31150	4374	4363	1784
Single	30	11	23	4
Unmarried, In a steady relationship and not living together	1	0	1	0
Unmarried, In a steady relationship and living together	2	0	1	0
Engaged	0	0	1	0
Married	65	80	73	87
Separated	0	0	0	0
Divorced	0	0	0	0
Widowed	0	6	1	7
Having Kids				
Have children at home below 14 living in the household	60	62	65	66
Don't have any children at home / No children below 14 living in the household	34	35	30	31

Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products Men : n=31150 Women : n=4374, Quitters Men : n = 4363 Women : n=1784

Profile Comparison

Profile of Current Users and Quitters				
	Current users of Tobacco Products		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Occupation	31150	4374	4363	1784
Working now	84	39	77	39
Only temporarily laid off, sick leave, or maternity leave	1	1	1	1
Looking for work, unemployed	1	1	2	1
Retired	1	3	5	2
Disabled, permanently, or temporarily	0	1	2	2
Keeping house	3	45	4	49
Student	5	4	5	1
Others	3	4	3	4

Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products Men : n=31150 Women : n=4374, Quitters Men : n = 4363 Women : n=1784

Profile Comparison

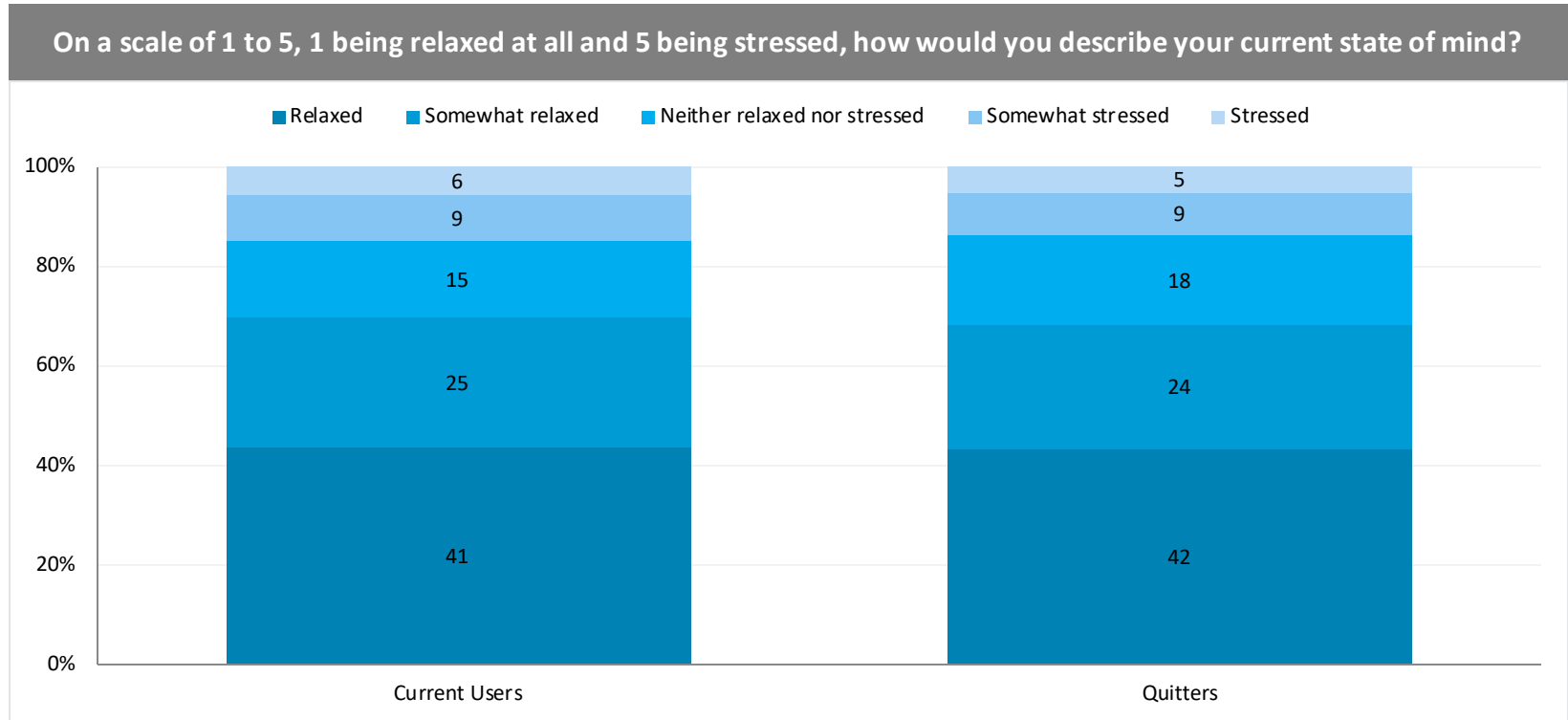
Profile of Current Users and Quitters				
	Current users of Tobacco Products		Quitters (who quit tobacco in last 5 years)	
	Men	Women	Men	Women
Annual Income	31150	4374	4363	1784
INR 5000 - INR 9999 per month	23	33	17	25
INR 10000 - INR 11999 per month	22	20	18	20
INR 12000 - INR 14999 per month	18	16	20	18
INR 15000 - INR 19999 per month	14	12	20	15
INR 20000 - INR 24999 per month	8	6	11	8
INR 25000 - INR 29999 per month	4	4	5	5
INR 30000 - INR 39999 per month	2	2	3	3
INR 40000 - INR 49999 per month	1	1	1	1
INR 50000 or more per month	2	1	1	1
Refused	5	4	3	2
Don't know	1	3	1	2
During the last twelve months, would you say you had trouble paying your bills?				
No	64	64	65	56
Yes	26	24	22	30

Figures are in %

Base : Random+ Booster Sample, Current Users of tobacco products Men : n=31150 Women : n=4374, Quitters Men : n = 4363 Women : n=1784

Comparison between Current Users of Tobacco Products & Quitters

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



in %

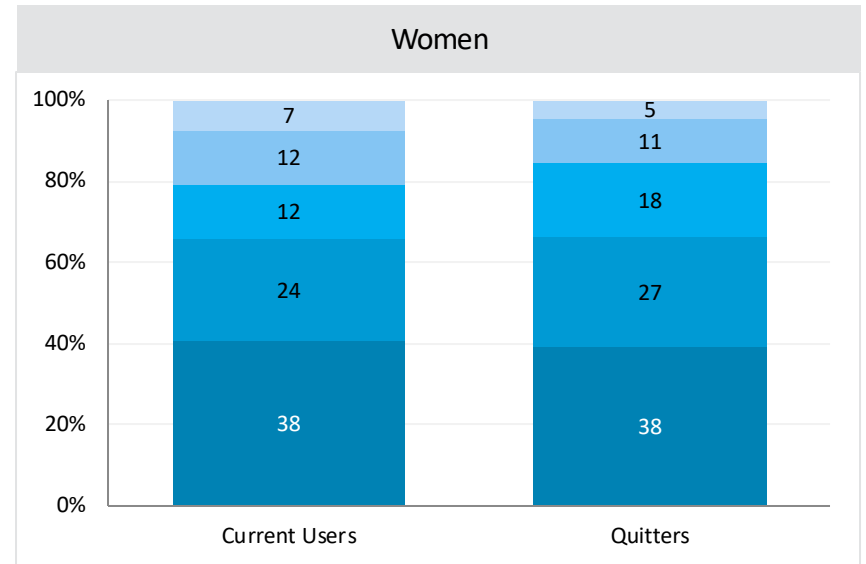
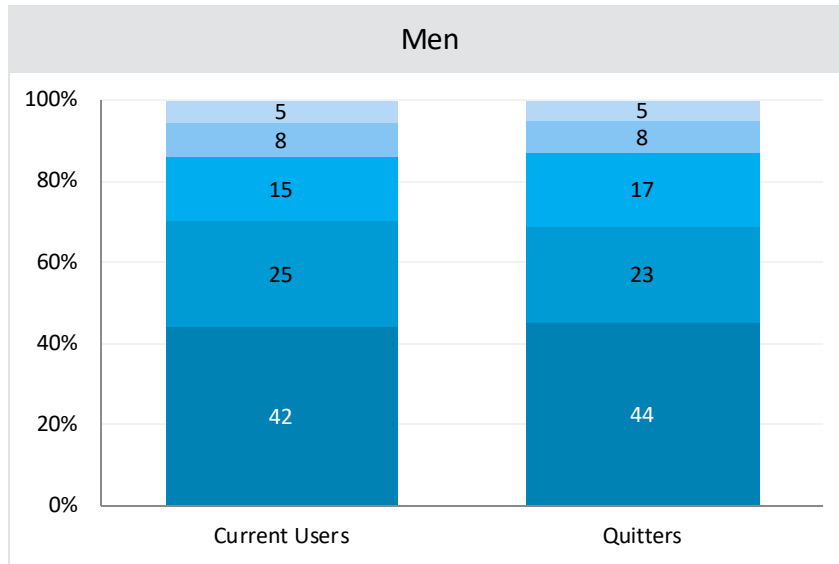
om + Booster Sample, Current Users of tobacco products : n=35526 Quitters : n=6147

Comparison between Current Users of Tobacco Products & Quitters

Among both men and women, approximately 65% of both current users & quitters feel relaxed/somewhat relaxed.

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+Booster Sample, Current Users of tobacco products Men : n=31150 Women : n=4374, Quitters Men : n=4363 Women : n=1784

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