



# 2020 Insights Survey

August 2020



# Methodology

## 2020 Insights survey:

China, India, Indonesia, Italy, Japan, South Africa, Sweden, UK, US

- This online, 9-country survey study (n=9,000 weighted) was commissioned by the Foundation for a Smoke-Free World and conducted through [Toluna](#), an enterprise partner of [ESOMAR](#), bound by and compliant with the [ICC/ESOMAR Code](#). Toluna is also an ISO 27001 certified company and is compliant with the GDPR, honoring participant anonymity.
- The survey was translated into local native languages (English in India and South Africa). All translations were proofread to ensure that the content was properly and completely translated with terminology suitable to the responding audience and ensuring that the text flowed smoothly and naturally in each language.
- The programmed version of each language was also checked including routing, response categories, and the correct order of scales. Using stratified sampling from non-probability, but managed online panels, samples are representative of the online population and weighted to the latest census data to be nationally representative.
- Survey fielding occurred in June 2020.
- Once the survey was closed, the data were downloaded, cleaned, and checked before final validation and dataset integration. This verified dataset was then used to generate statistical tables comparing results across different demographic, psychographic, and regional groupings. Multivariate analyses were conducted using SAS software.
- As in all cross-cultural surveys, the comparability of results across countries is affected by cultural response bias (different cultures tend to vary in terms of being more or less likely to agree, or to award extreme scores on either end of the scale). Per best practice in cross-cultural market research and public opinion research, data have not been standardized in order to preserve differentiation. In some cases, data are best interpreted by rank-order findings among countries.

## Survey questions:

*\*Standard demographics questions including gender, age, education and income levels, region, relationship status, children, and race/ethnicity were assessed.*

*Topical questions are as follows:*

### Do you do any of the following?

Yes | No

- a. Smoke cigarettes daily [All countries]
- b. Vape or use e-cigarettes daily [Italy, UK, USA]
- c. Use heated tobacco products daily [Japan and UK]
- d. Use snus daily [Sweden]

TO THOSE ANSWERING “YES” FOR CORRESPONDING ITEMS IN 1.

### Do you want to make changes to this behavior over the next year?

Yes, would like to do more of

Yes, would like to do less of

No

- a. Smoking cigarettes daily [All countries]
- b. Vaping or use e-cigarettes daily [Italy, UK, USA]
- c. Using heated tobacco products daily [Japan and UK]
- d. Use snus daily [Sweden]

TO THOSE ANSWERING 01 “YES” TO ANY OF 1.

### Have the past several months of the coronavirus/COVID-19 pandemic impacted your desire to quit using tobacco and/or

### nicotine products?

- a. Increased my desire to quit
- b. Decreased my desire to quit
- c. Had no effect

# Survey questions:

**Generally speaking, what changes to behavior will have the biggest positive impact on people's future health?**

**Please select two changes from the following list:**

Drinking less alcohol each day

Getting more physical activity

Quitting cigarettes

Eating less fatty and sugary foods

Spending less time sitting

Taking medications regularly

Spending more time relaxing and/or meditating

**Please indicate how much trust you have in each of the following institutions to operate in the best interest of our society?**

A lot of trust | some trust | not much trust | no trust at all

Our national government

The United Nations

The medical profession

**Would you accept the equivalent of a US\$100 gift today or wait a month and receive the equivalent of US\$125?**

Accept a US\$100 gift today

Wait a month and receive US\$125

**Please answer yes or no to the following questions:**

a. If a vaccine to prevent COVID-19 were available, would you use it?

b. Have you increased your handwashing daily over the last 2 months?

c. Do you believe that nicotine is a major cause of cancer?

d. Do you believe that artificial sweeteners cause cancer?

**Please rate how well tobacco companies fulfill their responsibilities to society compared to other types of companies.**

Among the very best | Above average | Average | Below average | Among the very worst

# Summary of Insights

- Most want to reduce their use of nicotine products, especially in the wake of the pandemic.
- Quitting cigarettes is seen as one of the most effective changes with a positive impact on health but is seen to be less effective than getting more exercise.
- Most believe that nicotine causes cancer, while fewer believe that artificial sweeteners do.
- Most would use a COVID-19 vaccine if available; almost all have changed behavior to increase handwashing.
- Daily nicotine product users are more prone to short-termism, especially when affected by the current pandemic.
- Daily nicotine users are more prone to short-termism than non-users, but those nicotine users who prefer to wait for a larger reward are slightly more likely to see quitting cigarettes as important for future health.
- Females appear to be more tuned in to gender issues and corporate responsibility.
- Females are potentially more worried about misleading claims about nicotine and vaccines.



# Nicotine Use and Desire to Quit

# Key Findings

Most want to reduce their use of nicotine products, especially in the wake of the pandemic

- The proportion of people who say they smoke daily varies at around 20–30 percent in most of the countries surveyed, with Indonesians being the most likely to say they smoke. Daily use of vaping or e-cigarettes, heated tobacco, or snus (chewing tobacco) is less prevalent in the countries surveyed.
- People would generally like to reduce their use of nicotine products, including the use of vape or e-cigarettes. However, fewer than half of snus users in Sweden say that they would like to use less.
- The impact of the COVID-19 epidemic on people's desire to quit using nicotine products varies among markets, with majorities in South Africa, and Indonesia claiming the pandemic has increased their desire to quit. Overall, few say the pandemic has decreased their desire to quit using nicotine products.
- Those more affected by the pandemic are also generally more likely to say that it has increased their motivation to stop using nicotine products.



# Key Findings

Quitting cigarettes is seen as one of the most effective changes with a positive impact on health, but is seen to be less effective than getting more exercise

- When asked to select changes to behavior that will have the biggest positive impact on people's future health, people tend to mention increased physical activity as a key priority – this is the top selection in all markets surveyed, except in Indonesia where quitting cigarettes is selected most often.
- Quitting cigarettes and eating less fatty and sugary foods are second-tier priorities overall; quitting cigarettes is ranked second in terms of having the largest positive impact in Italy, Japan, and Sweden, whereas eating healthier is ranked second in China, South Africa, the UK, and the USA.

Most believe that nicotine causes cancer, while fewer believe that artificial sweeteners do

- Three-quarters of people across the markets surveyed believe that nicotine is a major cause of cancer, with Italians being the most likely to hold this belief (83%). Indonesians are the least likely to believe this (69%).
- People are significantly less likely to believe that artificial sweeteners cause cancer, with Indonesians being the most likely to say they do (69%) while the British are the least likely (39%).

# Key Findings

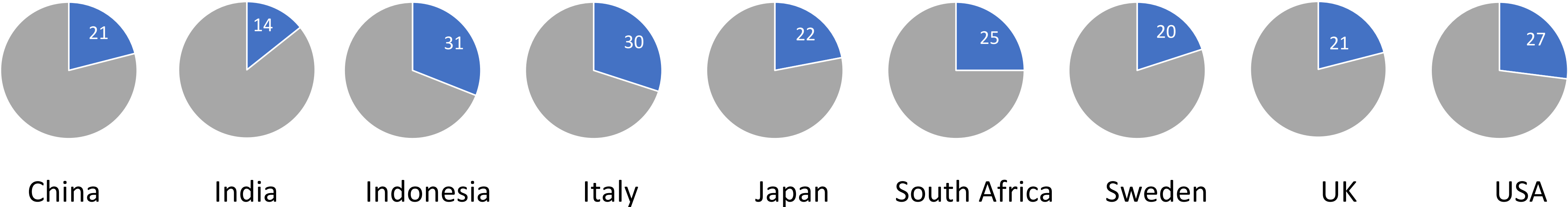
Most would use a COVID-19 vaccine if available; almost all have changed behavior to increase handwashing

- Overall, around four in five people would use a vaccine to prevent COVID-19 if available, although proportions are smaller in South Africa, Sweden, and the USA. Those affected by the pandemic are consistently more willing to use COVID-19 vaccine if available
- In the wake of the pandemic, nine in ten people across the nine markets say that they have increased their daily handwashing over the past two months with little variation among the countries.

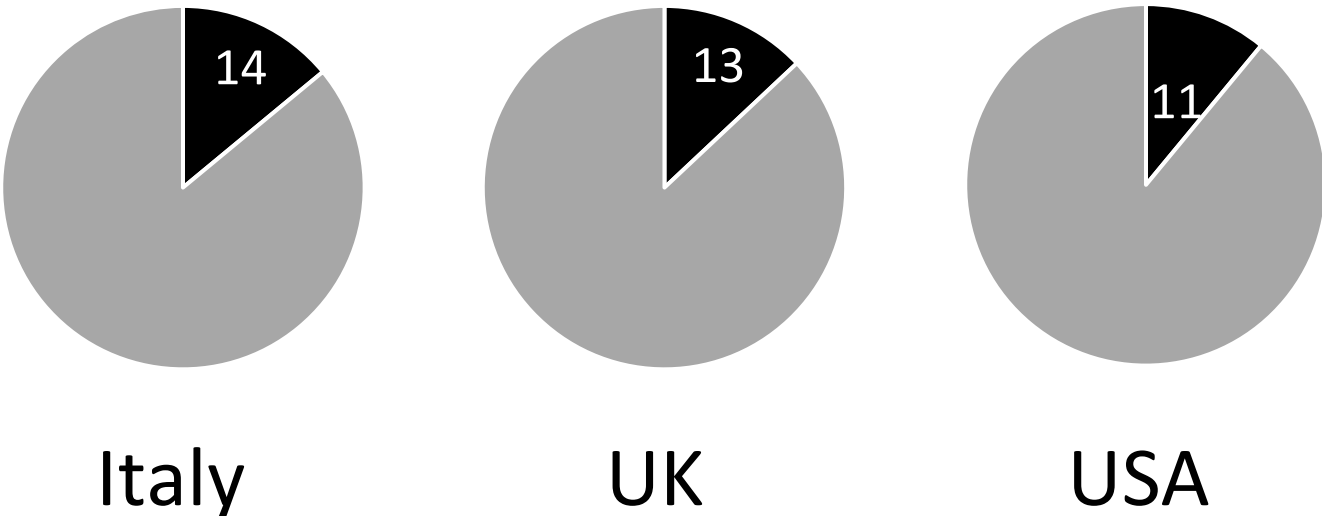
# Smoking is most prevalent in Indonesia and Italy

## Nicotine Product Use, "Yes," by Country, 2020

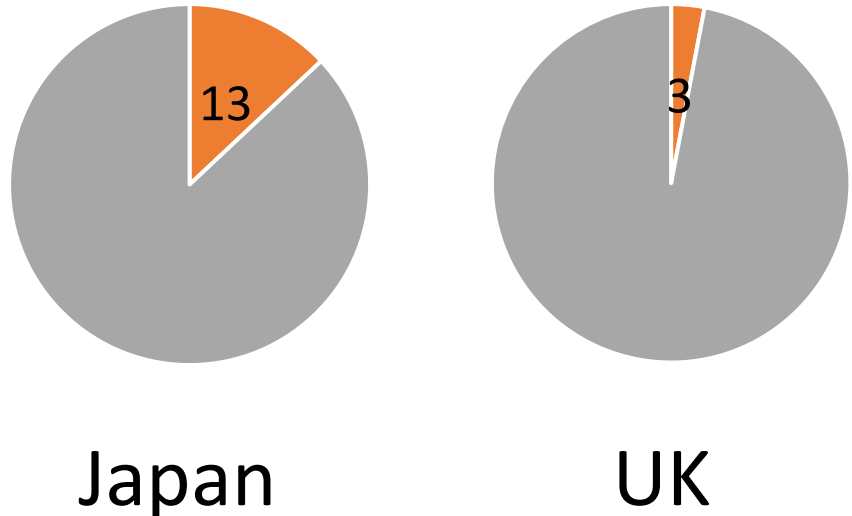
### Smoke cigarettes daily



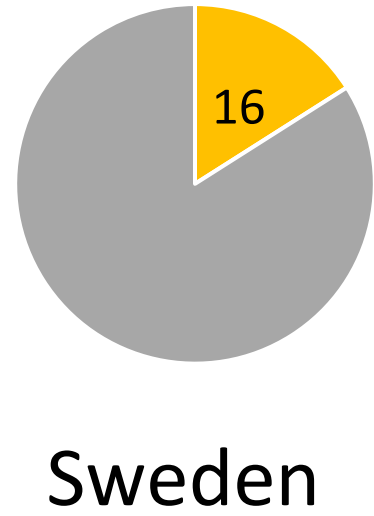
### Vape or use e-cigarettes daily



### Use heated tobacco products daily



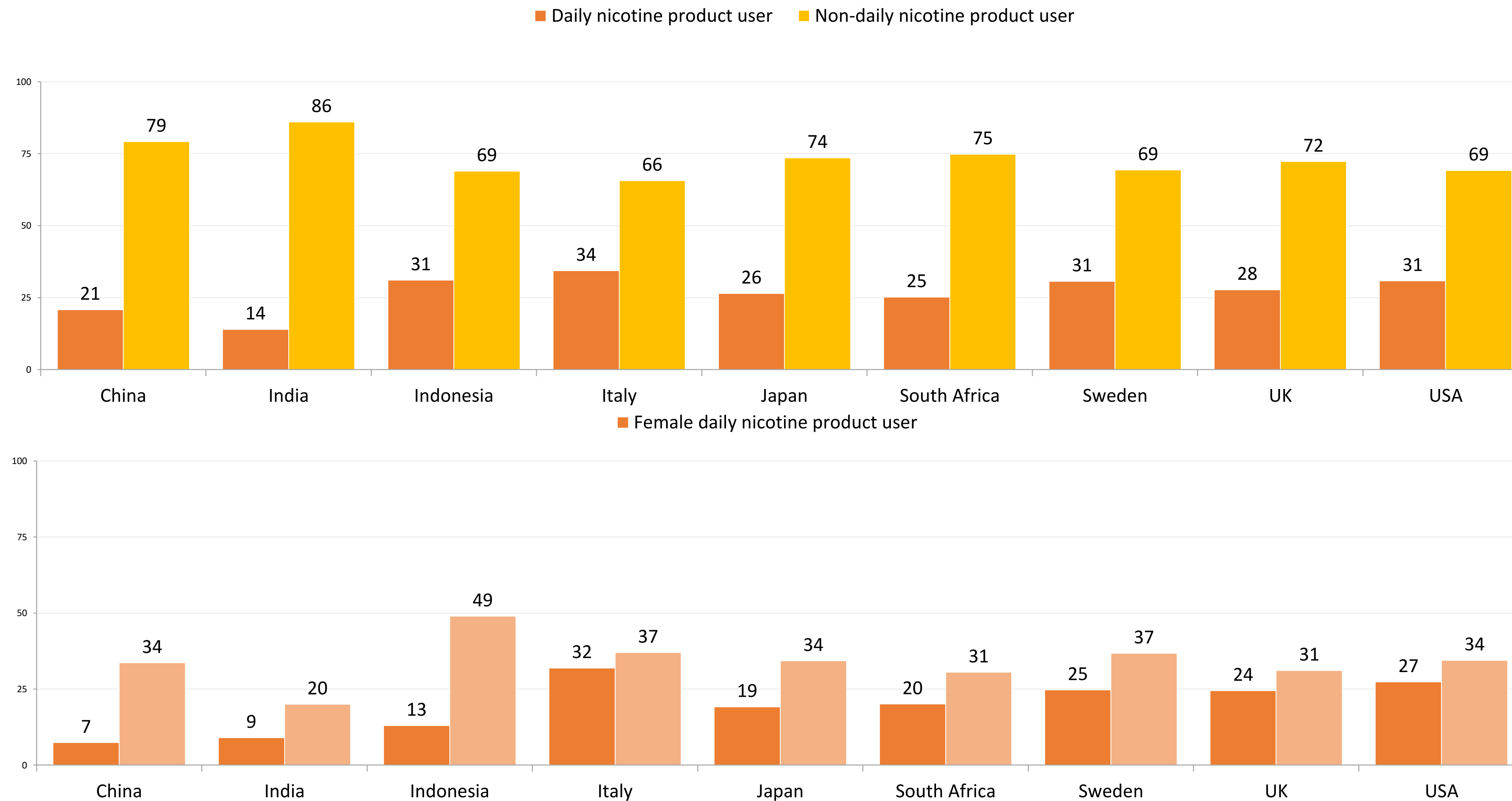
### Use snus daily



Next are some questions about some things you may do from day to day. Do you do any of the following?

# Males are more likely to use nicotine products daily

## Nicotine Product Use, by Country, 2020

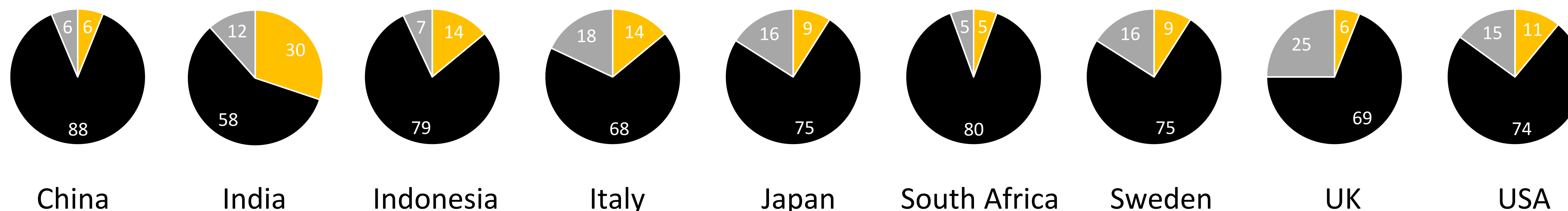


Next are some questions about some things you may do from day to day. Do you do any of the following?

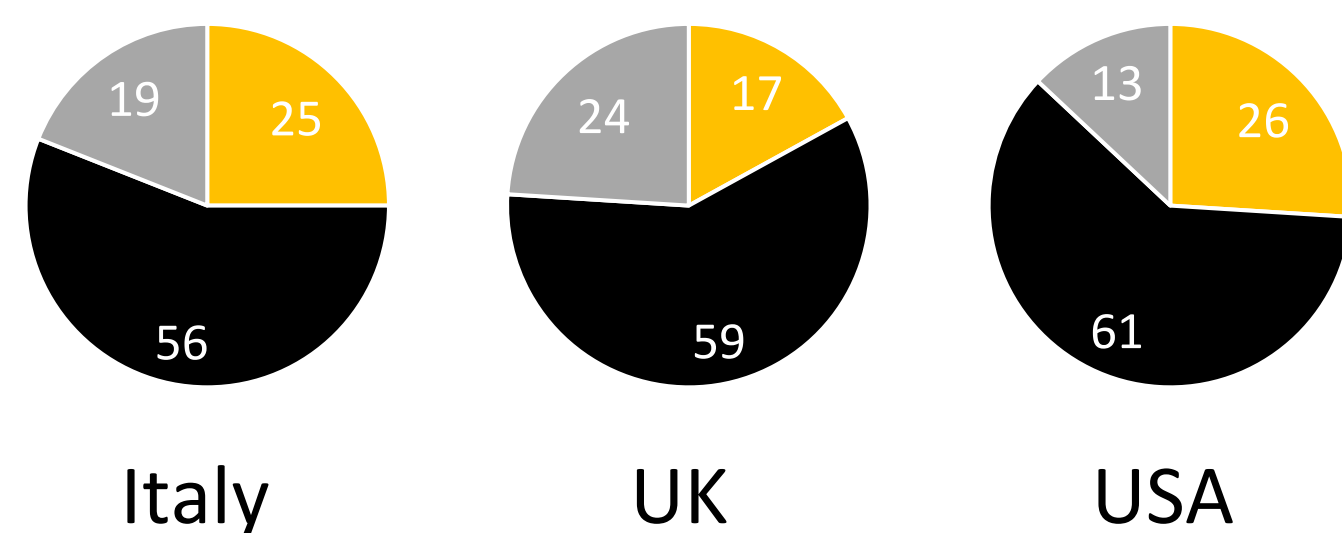
# Most want to reduce their use of nicotine products

Desire to Change Nicotine Product Use, All Who Use Each Nicotine Product, by Country, 2020

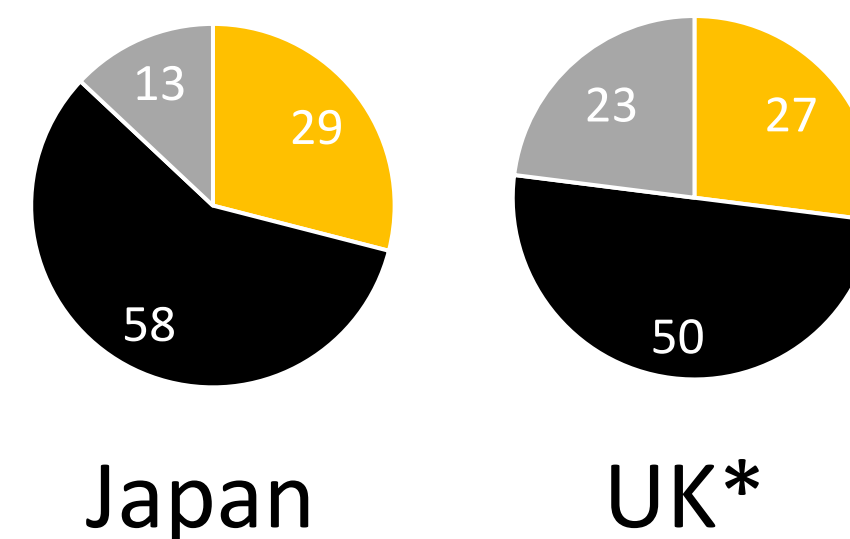
## Smoke cigarettes daily



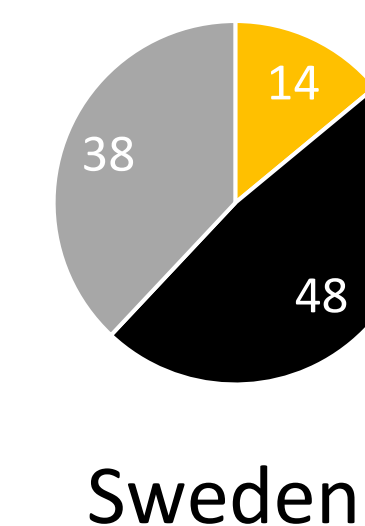
## Vape or use e-cigarettes daily



## Use heated tobacco products daily



## Use snus daily

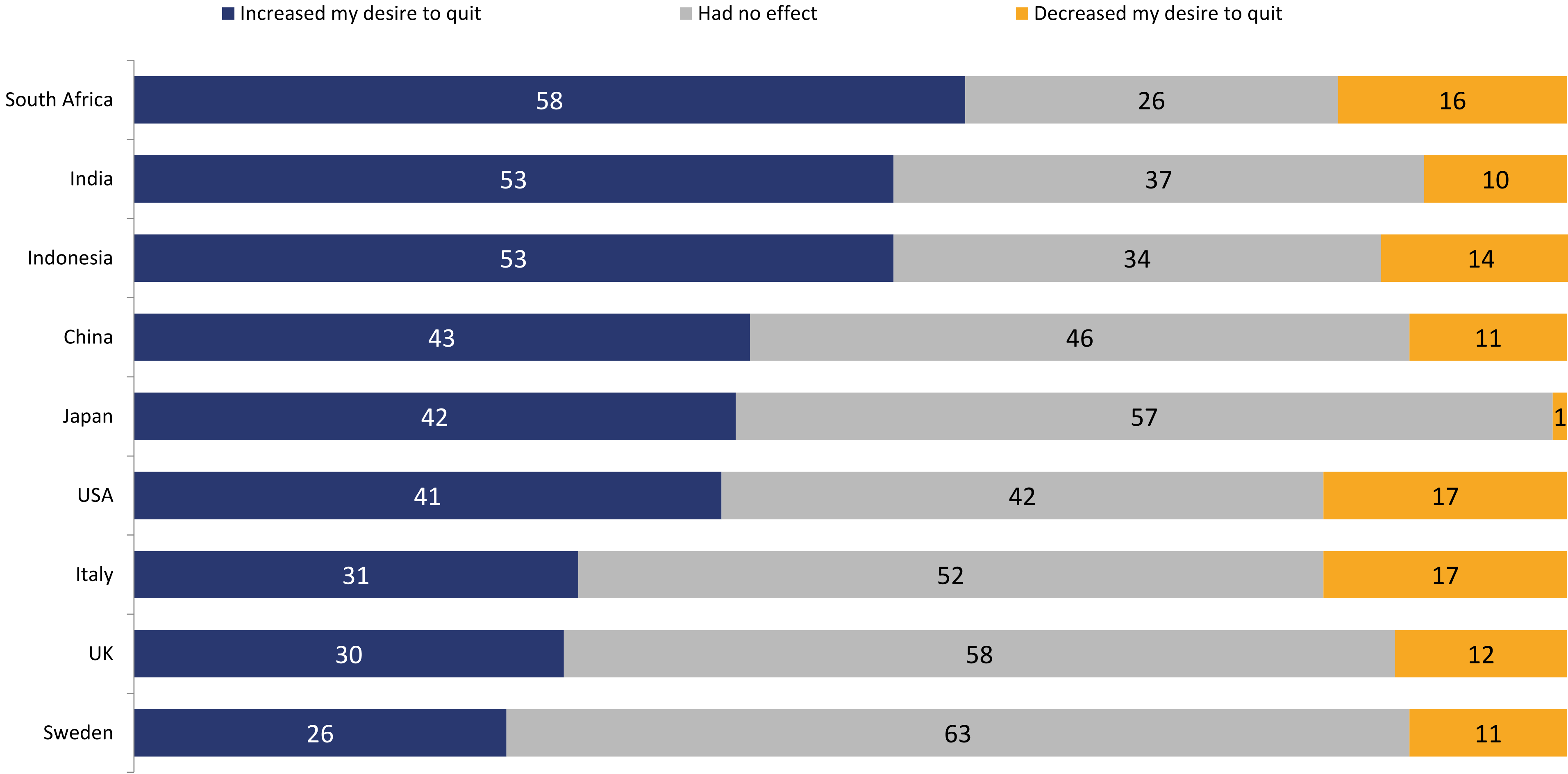


Do you want to make changes to this behavior over the next year?

\*Caution: Small base size

# South Africans, Indians, and Indonesians are most motivated to quit using nicotine products because of the pandemic

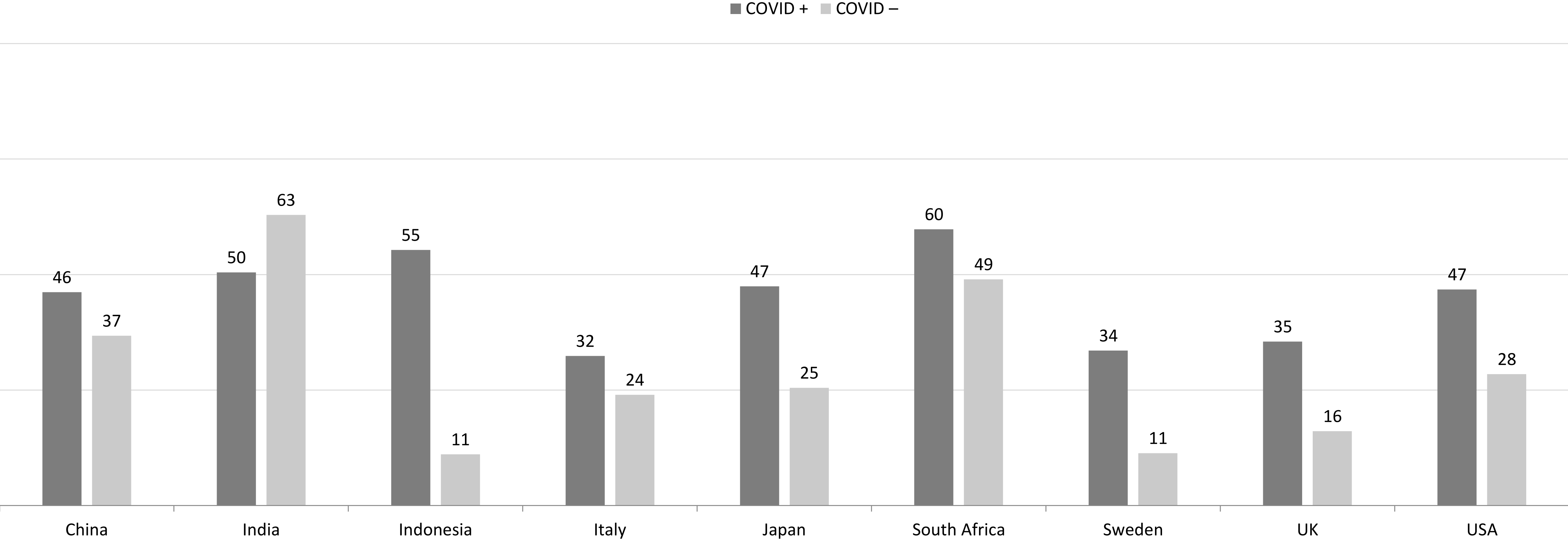
Impact of COVID-19 on Desire to Quit, All Who Use Nicotine Products, by Country, 2020



Have the past several months of the coronavirus/COVID-19 pandemic impacted your desire to quit using tobacco and/or nicotine products?

# Those affected by the pandemic tend to be the most motivated to quit using nicotine products as a result

Impact of COVID-19 on Desire to Quit, “Increased Desire to Quit,” All Who Use Nicotine Products, by COVID Impact, by Country, 2020

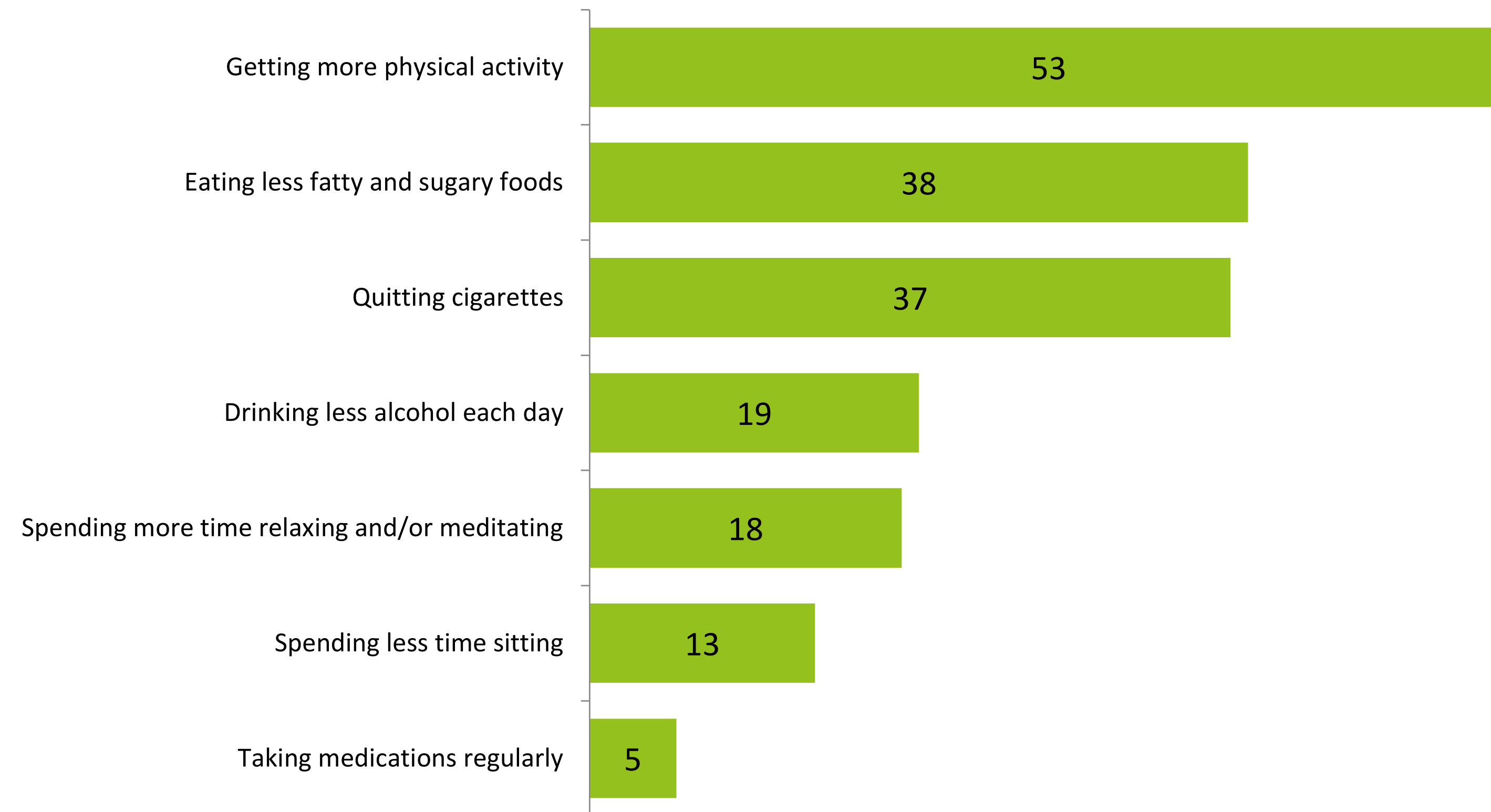


COVID+ refers to those greatly or moderately affected by the coronavirus / COVID-19 pandemic, while COVID- refers to those affected a little or not at all. COVID- samples are very small in India ( $n=28$ ), Indonesia ( $n=20$ ), Italy ( $n=39$ ), and S. Africa ( $n=34$ ).

Have the past several months of the coronavirus/COVID-19 pandemic impacted your desire to quit using tobacco and/or nicotine products?

Quitting cigarettes is generally seen as one of the most effective changes with a positive impact on health, after exercise and diet

Most Impactful  
Healthy Behaviors,  
Average of 9 Countries,  
2020



Generally speaking, what changes to behavior will have the biggest positive impact on people's future health? Please select two changes from the following list:



# Exercise, diet, and quitting cigarettes are seen as the most impactful healthy changes across all markets

Most Impactful Healthy Behaviors, by Country, 2020

## Top 3 by Country

### China

- Physical activity: 67%
- Less fatty/sugary foods: 33%
- **Quitting cigarettes: 28%**

### Indonesia

- **Quitting cigarettes: 53%**
- Physical activity; Less alcohol: 35%, each

### India

- Physical activity: 49%
- Less fatty/sugary foods: 33%
- **Quitting cigarettes: 24%**

### Italy

- Physical activity: 60%
- **Quitting cigarettes: 44%**
- Less fatty/sugary foods: 43%

### Japan

- Physical activity: 47%
- **Quitting cigarettes: 38%**
- Less fatty/sugary foods: 31%

### South Africa

- Physical activity: 55%
- Less fatty/sugary foods: 49%
- **Quitting cigarettes: 35%**

### Sweden

- Physical activity: 60%
- **Quitting cigarettes: 40%**
- Less fatty/sugary foods: 30%

### UK

- Physical activity: 50%
- Less fatty/sugary foods: 48%
- **Quitting cigarettes: 40%**

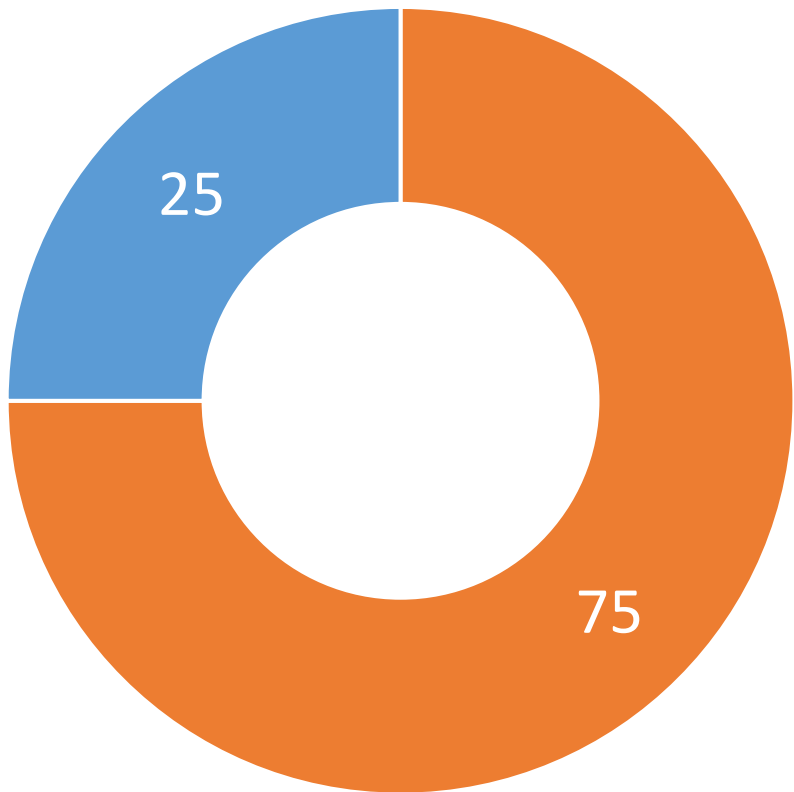
### USA

- Physical activity: 56%
- Less fatty/sugary foods: 40%
- **Quitting cigarettes: 34%**

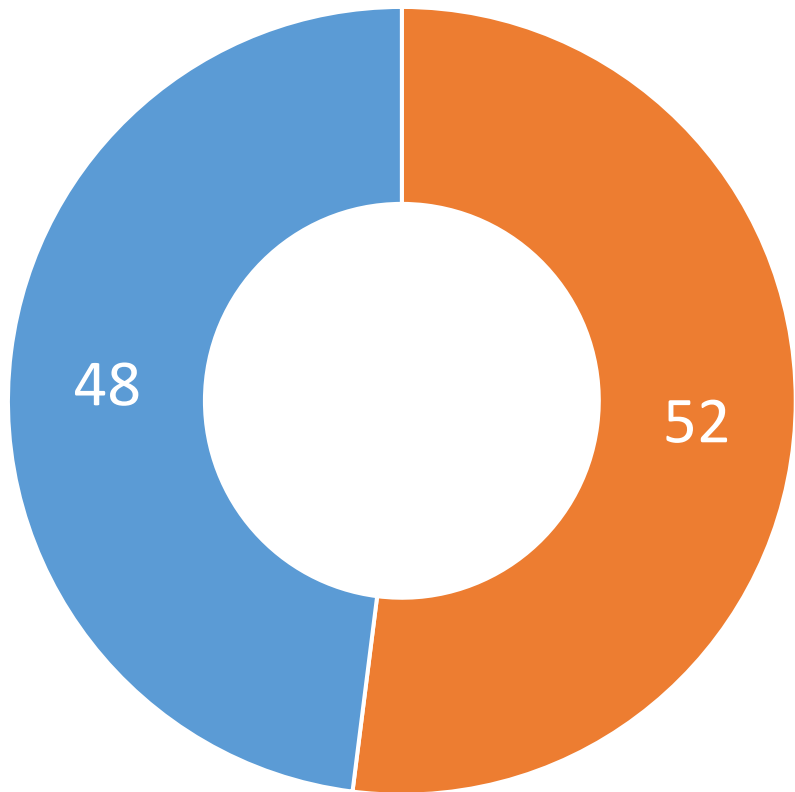
Generally speaking, what changes to behavior will have the biggest positive impact on people's future health? Please select two changes from the following list:

# Three-quarters believe that nicotine causes cancer, while fewer believe that artificial sweeteners do

Believe Nicotine/Sweetener Causes Cancer, "Yes," Average of 9 Countries and by Country, 2020



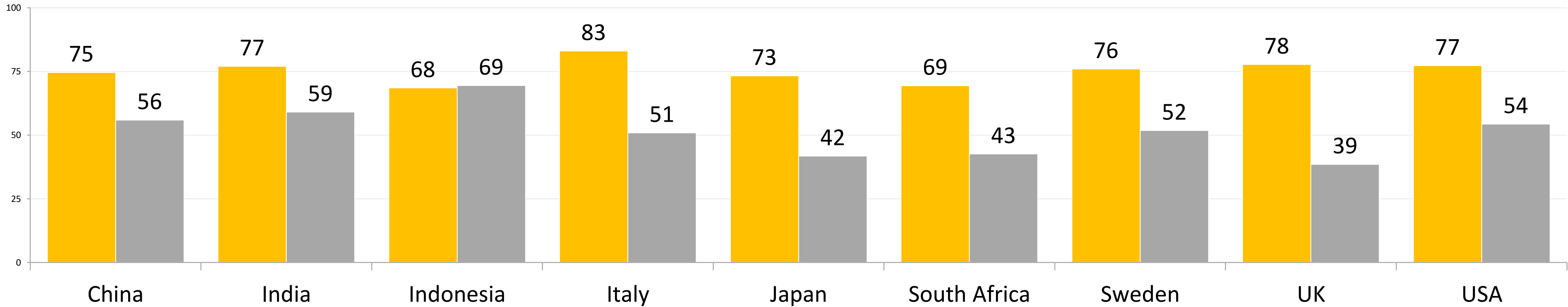
Do you believe that nicotine is a major cause of cancer?



Do you believe that artificial sweeteners cause cancer?

■ Believe nicotine is a major cause of cancer

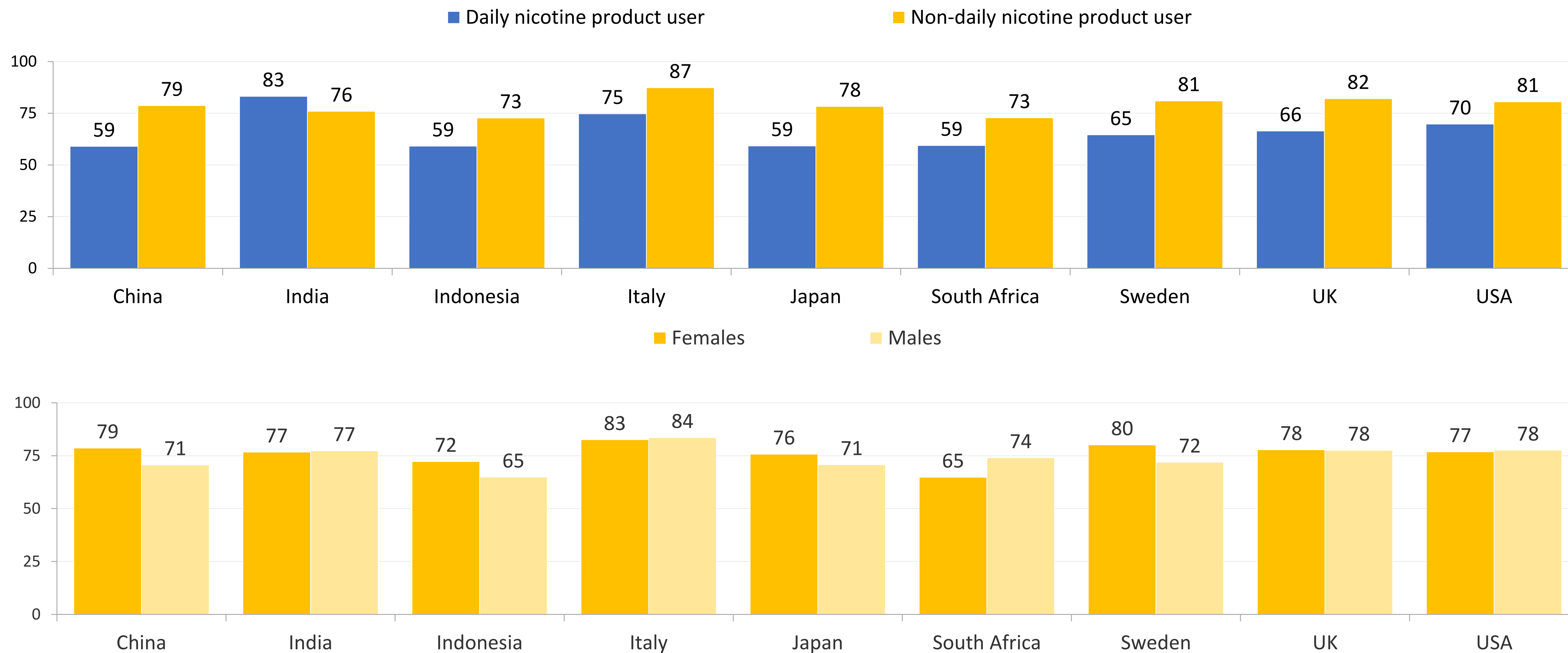
■ Believe artificial sweeteners are a major cause of cancer



Please answer yes or no to the following questions:

# Daily nicotine product users are less likely than non-users to believe that nicotine causes cancer

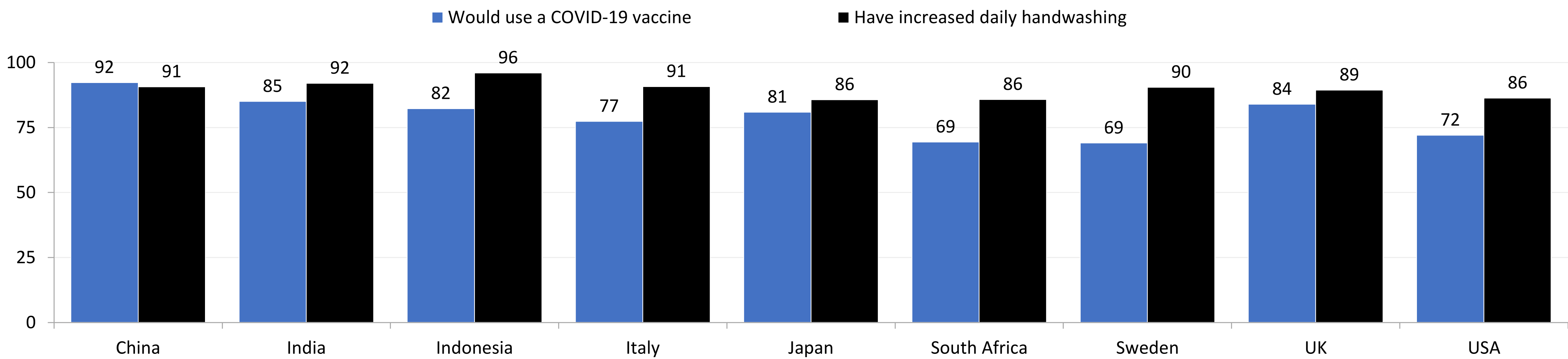
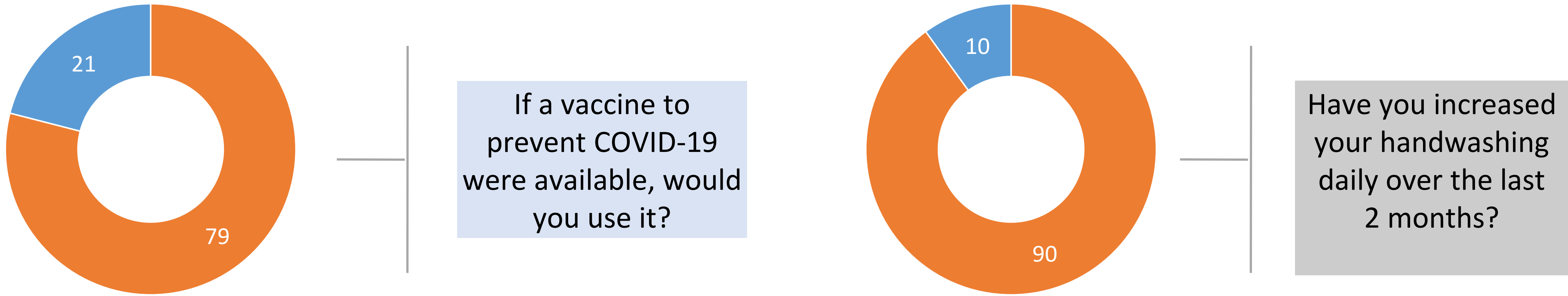
Believe Nicotine Causes Cancer, by Nicotine Product Use and Gender, by Country, 2020



Please answer yes or no to the following questions: Do you believe that nicotine is a major cause of cancer?

# Most would use COVID-19 vaccine if available; almost all have increased their handwashing

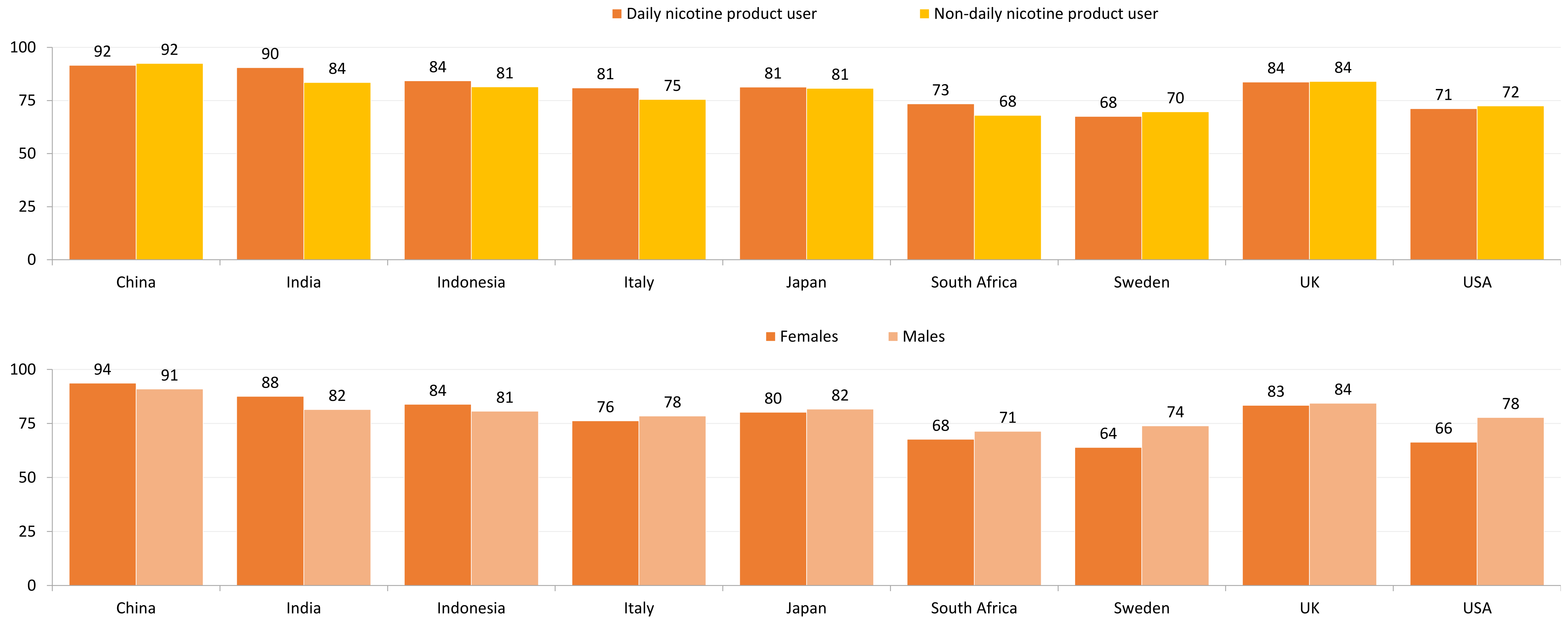
Health Perceptions, Average of 9 Countries and by Country, 2020



Please answer yes or no to the following questions:

# Nicotine product users and non-users have similar attitudes toward using COVID-19 vaccine if available

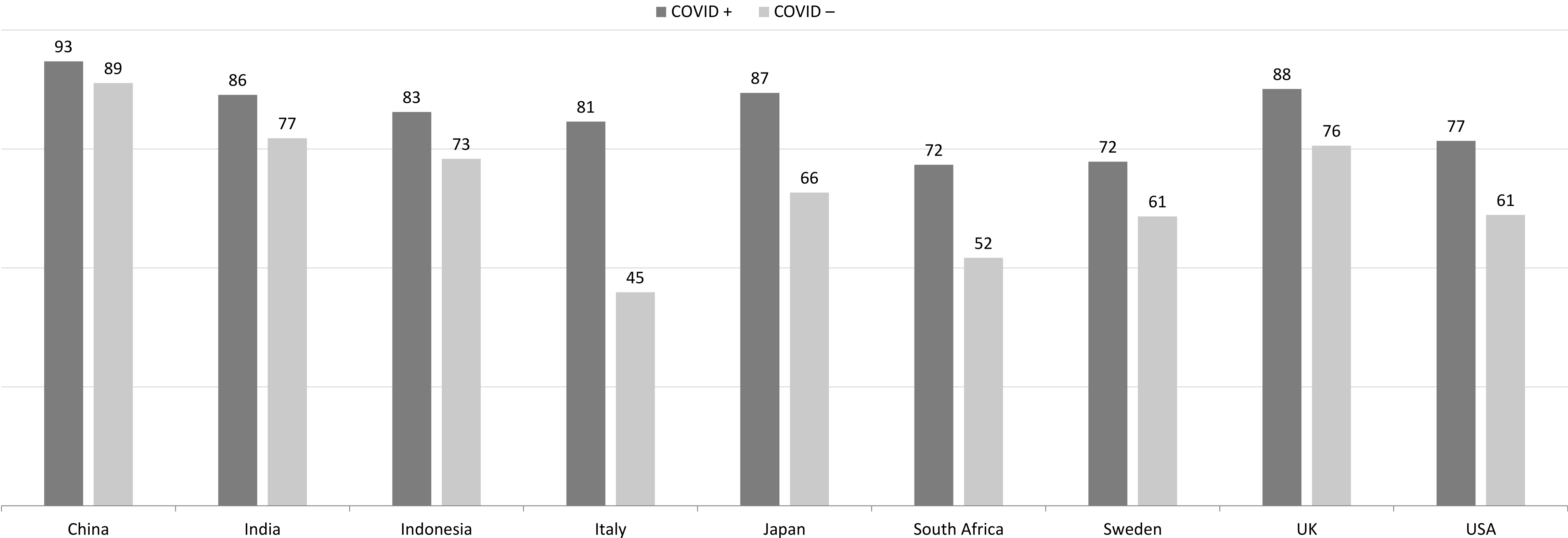
Would Use COVID-19 Vaccine, by Nicotine Product Use and Gender, by Country, 2020



F31. Please answer yes or no to the following questions: Do you believe that nicotine is a major cause of cancer? If a vaccine to prevent COVID-19 were available, would you use it?

# Those affected by the pandemic are consistently more willing to use COVID-19 vaccine if available

Would Use COVID-19 Vaccine, by COVID Impact, by Country, 2020



COVID+ refers to those greatly or moderately affected by the coronavirus / COVID-19 pandemic, while COVID- refers to those affected a little or not at all.

Please answer yes or no to the following questions: Do you believe that nicotine is a major cause of cancer? If a vaccine to prevent COVID-19 were available, would you use it?



# Health and Nicotine Product Use Status Relative to Health Concerns

# Key Findings

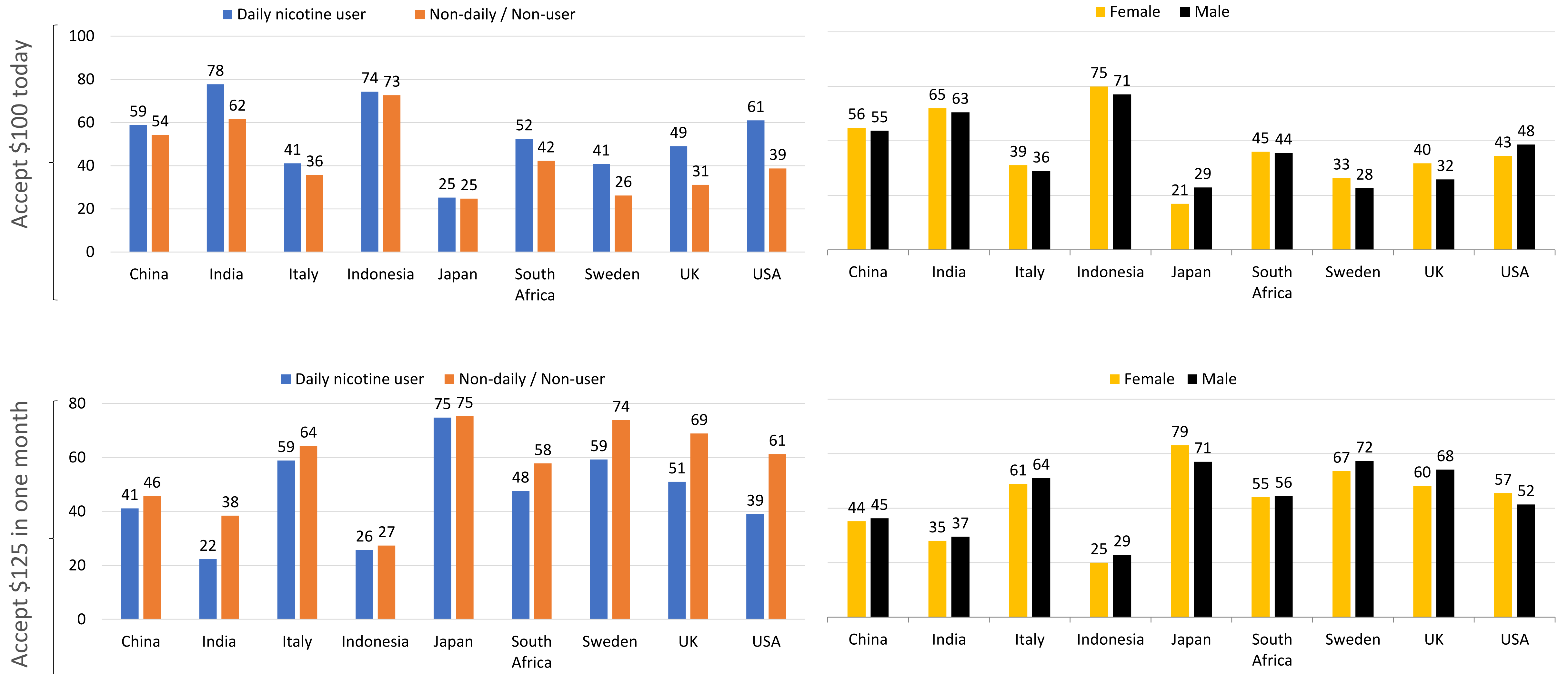
Daily nicotine product users are more prone to short-termism, especially when affected by the current pandemic

- When faced with a hypothetical choice of \$100 now or \$125 in one month, nicotine users tend to be more likely than non-users to choose the immediate reward. Among nicotine users, those affected by the pandemic are also more prone to short-termism than those who are not affected as much, except in South Africa.



# Daily nicotine users tend to be more likely than non-users to choose \$100 now; gender differences are smaller in most markets

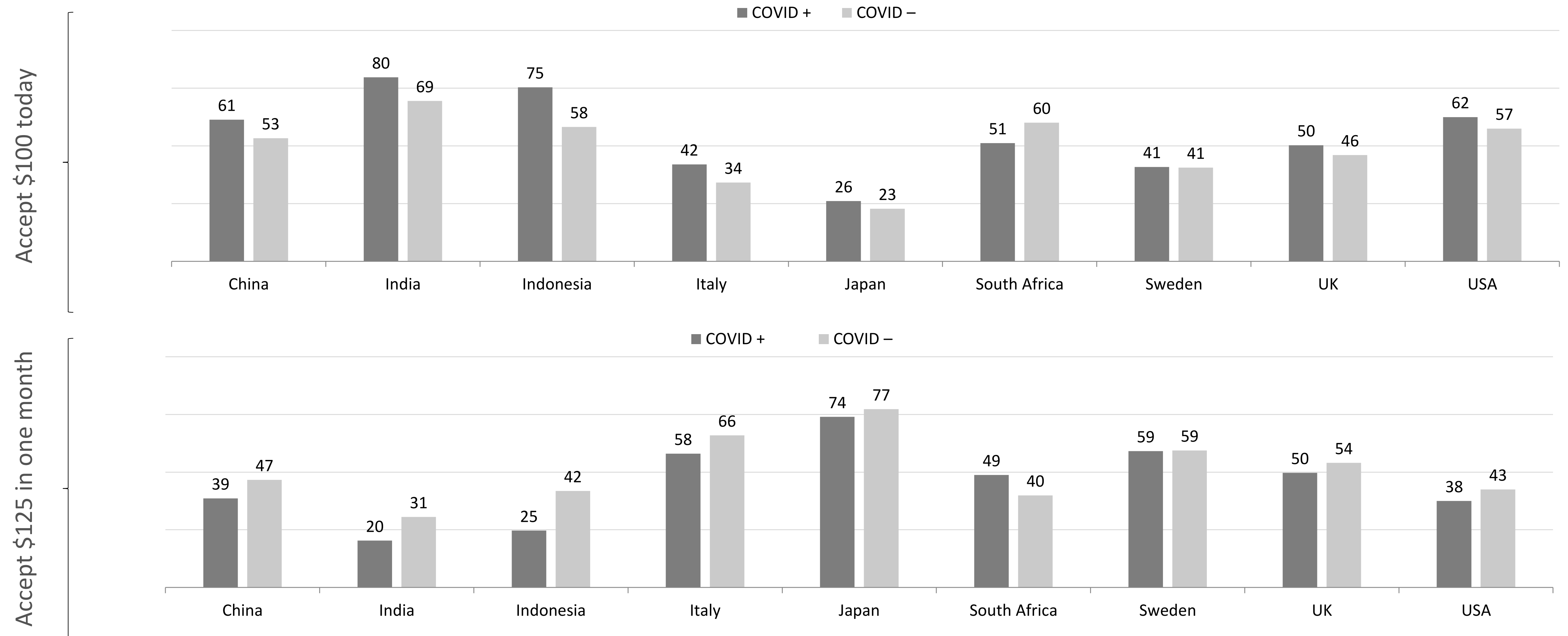
Hyperbolic Discounting, by Nicotine Use and Gender, by Country, 2020



Would you accept the equivalent of a US\$100 gift today or wait a month and receive the equivalent of US\$125?

# Nicotine users who are affected by the pandemic are more prone to short-termism than those not affected, except in South Africa

Hyperbolic Discounting, Subsample: Nicotine Product Users, by COVID Impact, by Country, 2020



COVID+ refers to those greatly or moderately affected by the coronavirus / COVID-19 pandemic, while COVID- refers to those affected a little or not at all. COVID- samples are very small in India ( $n=28$ ), Indonesia ( $n=20$ ), Italy ( $n=39$ ), and S. Africa ( $n=34$ ).



# Hyperbolic Discounting and Healthy Behaviors

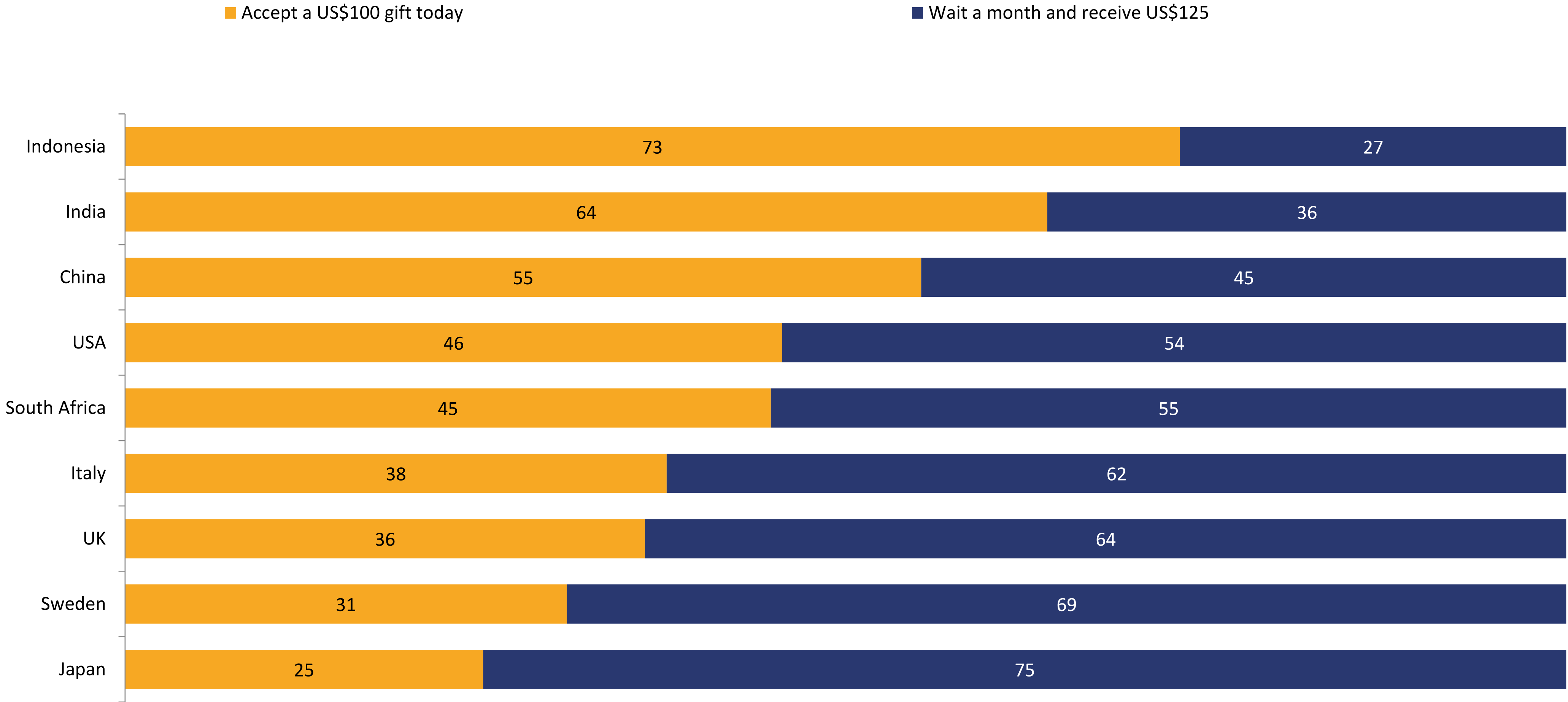
# Key Findings

Daily nicotine users are more prone to short-termism than non-users, but those nicotine users who prefer to wait for a larger reward are slightly more likely to see quitting cigarettes as important for future health

- When asked whether they would accept the equivalent of a US\$100 gift today or wait a month and receive the equivalent of US\$125, preferences vary strongly across the nine markets. Indonesians and Indians are the most likely to prefer to immediately receive the US\$100 equivalent, whereas Japanese and Swedes are the most likely to prefer waiting a month for the US\$125 equivalent.
- Nicotine users are more prone to short-termism than non-users, whereas the personal impact of COVID-19 is not a strong differentiator. Age and income are predictors of preference in most markets; patterns according to age vary by market, but those with lower incomes are consistently prone to short-termism.
- Those preferring to wait to get \$125 are slightly more likely to name quitting cigarettes as a key healthy behavior change. Indian and Italian daily smokers who prefer to receive \$125 later are significantly more likely to want to smoke less than those who prefer \$100 now.

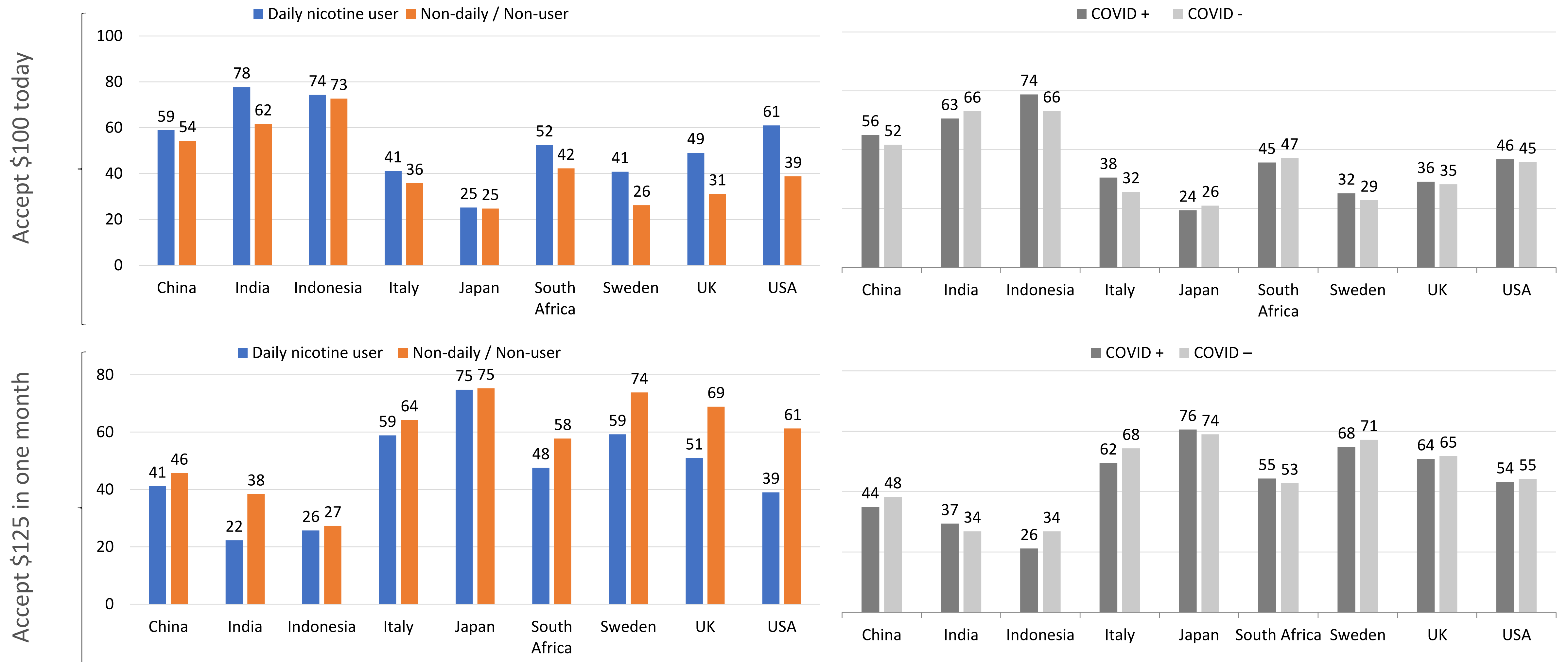
# There is significant variation among markets on instant vs delayed gratification preference

## Gift Preference, by Country, 2020



# Nicotine users are more prone to short-termism than non-users; COVID-19 impact is not a strong differentiator

## Hyperbolic Discounting, by Country, Nicotine Use, and COVID Impact, 2020

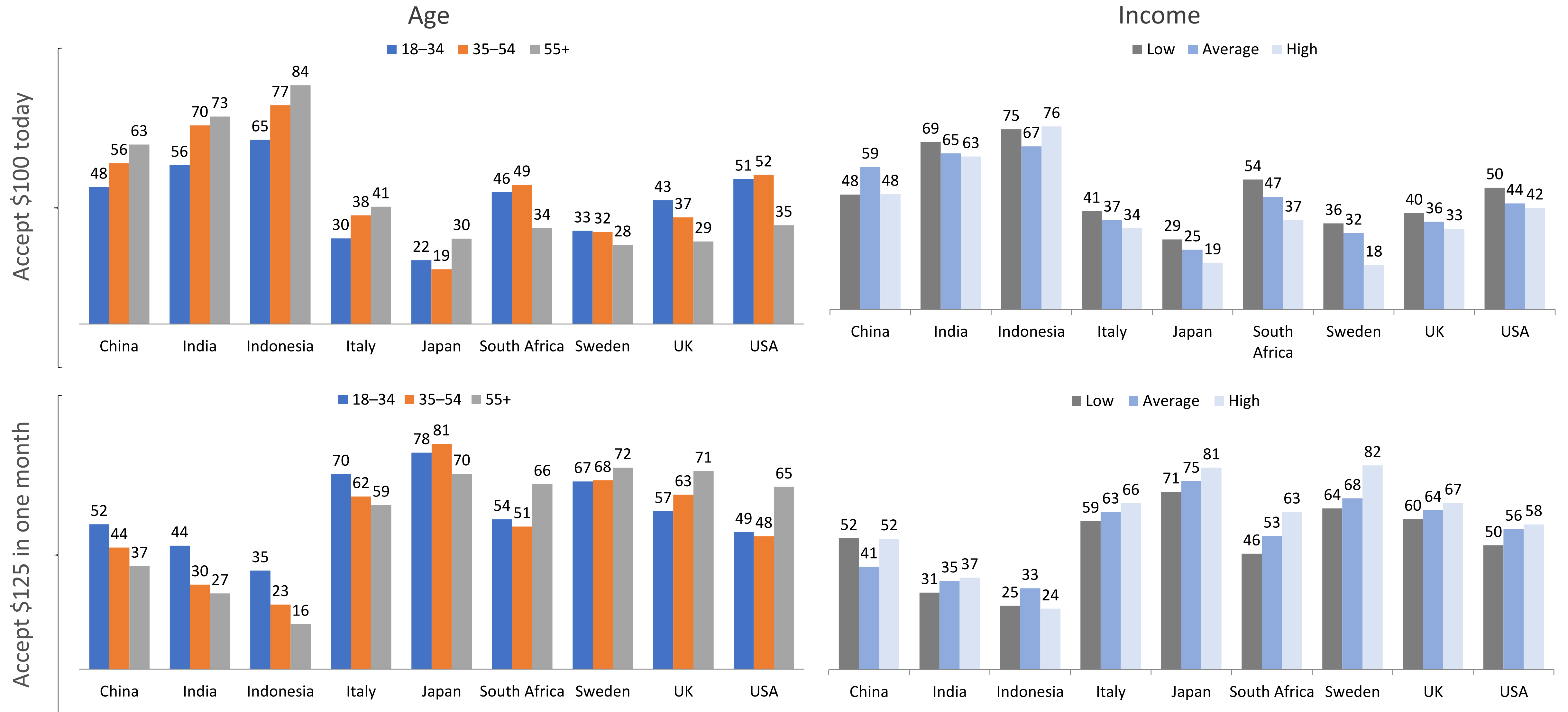


COVID+ refers to those greatly or moderately affected by the coronavirus / COVID-19 pandemic, while COVID - refers to those affected a little or not at all.

Would you accept the equivalent of a US\$100 gift today or wait a month and receive the equivalent of US\$125?

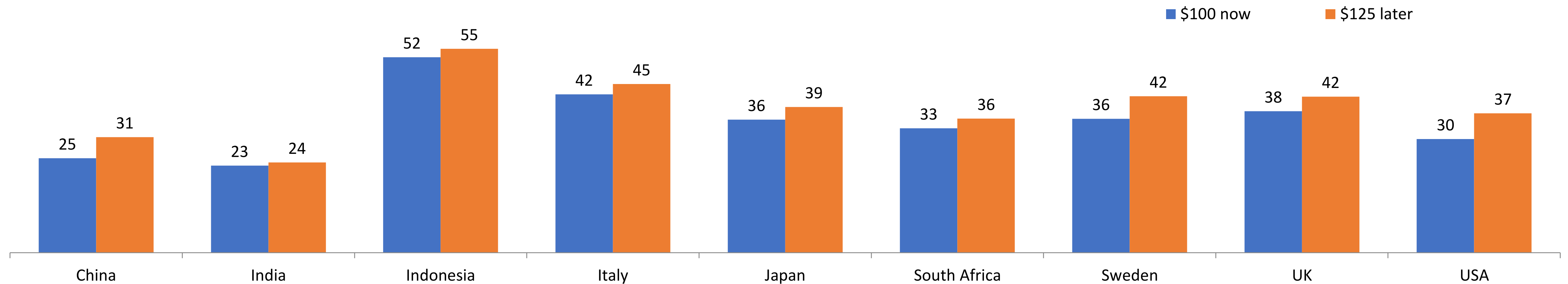
# Age and income are predictors of preference in most markets

## Hyperbolic Discounting, by Country, Age and Income, 2020

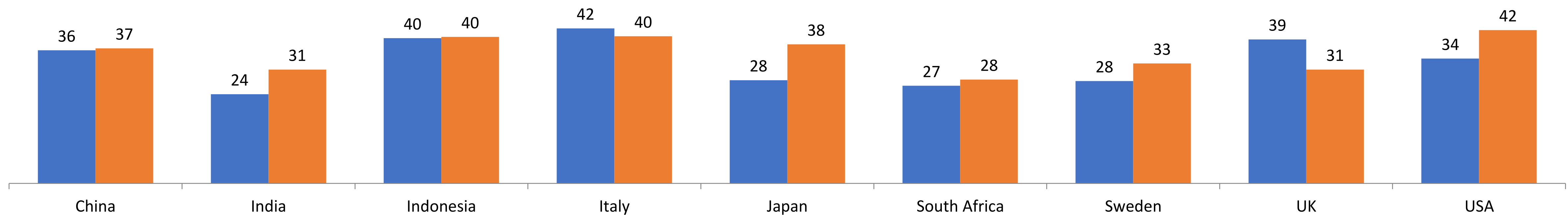


# Those preferring to wait to get \$125 are slightly more likely to name quitting cigarettes as a key healthy behavior change

Most Impactful Healthy Behaviors, Quitting Cigarettes, by Country and Preference, 2020



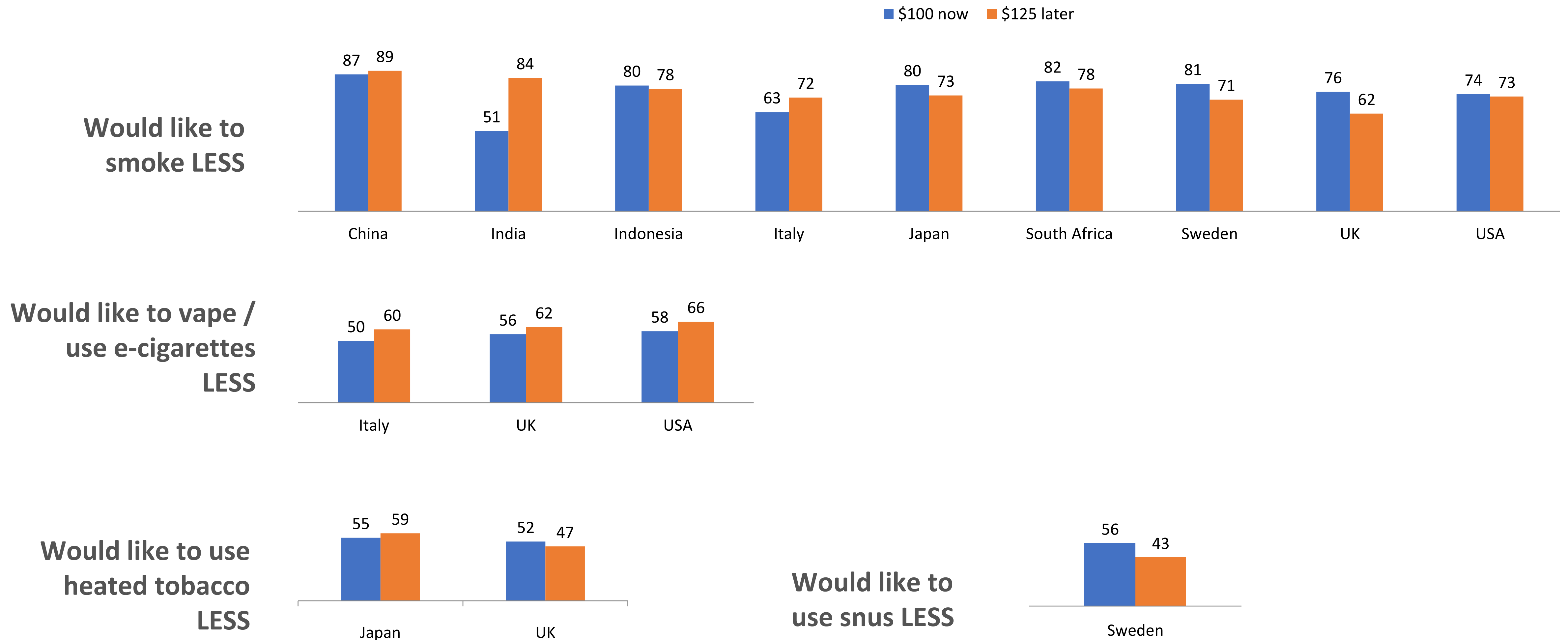
## Subsample: Nicotine Product Users





# Indian and Italian daily smokers who prefer \$125 later are significantly more likely to want to smoke less than those who prefer \$100 now

Subsample: Nicotine Product Users, by Preference, by Country, 2020



Next are some questions about some things you may do from day to day. Do you do any of the following?

Do you want to make changes to this behavior over the next year?



# Gender Differences

# Key Findings

## Females appear to be more tuned in to gender issues and corporate responsibility

- Perceptions of gender inequality vary widely across markets, with females and non-nicotine users mostly more concerned about the unequal treatment of women.
- Females generally have higher expectations than males of the responsibilities of large companies in a range of areas.
- At the same time, female respondents in China, India, Indonesia, and Japan tend to rate companies higher than males do on fulfilling their societal responsibilities; Swedish women instead rate companies lower.

## Females are potentially more worried about misleading claims about nicotine and vaccines

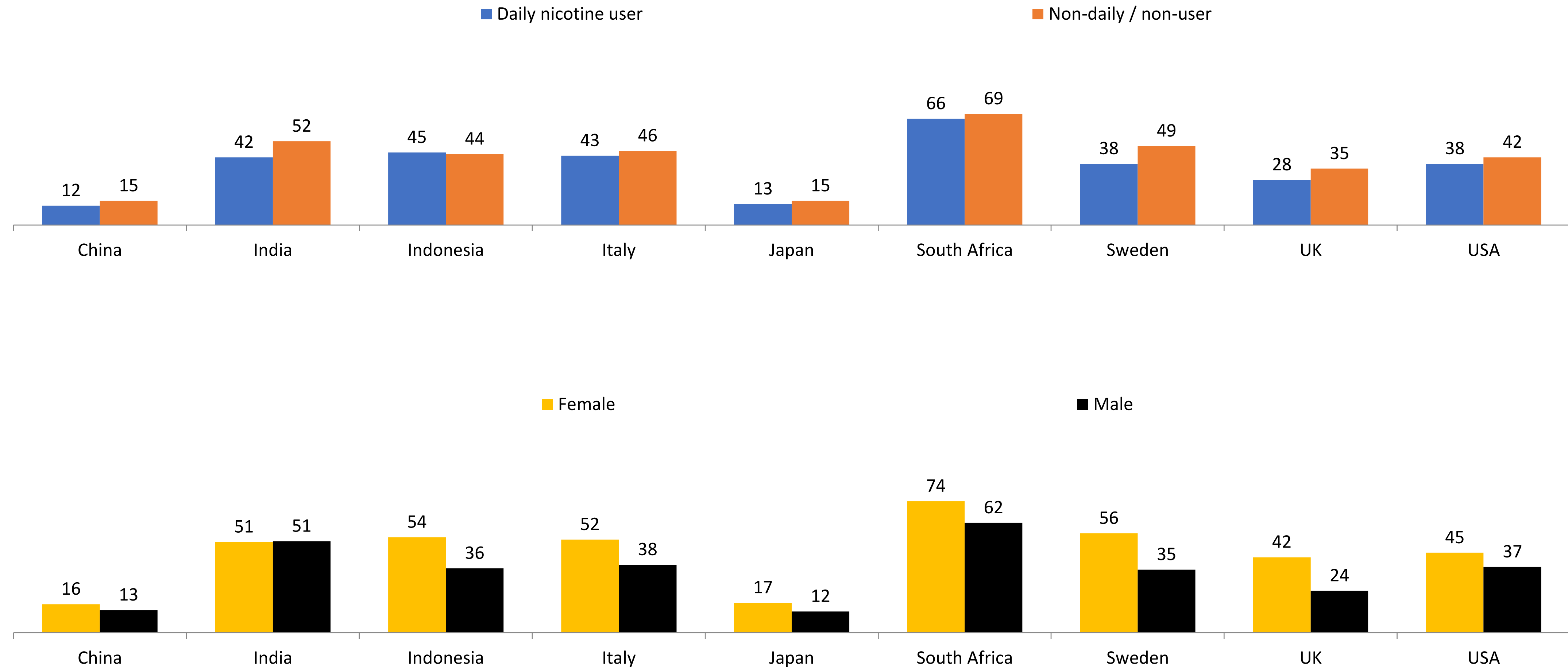
- Females in several markets are more likely than males to say that the pandemic increased their desire to quit using nicotine products, but those in India and South Africa show the opposite.
- However, quitting cigarettes is more often seen by males as one of the most effective changes with a positive impact on health, and is consistent across the markets; females instead consistently point to a healthier diet more often than males.

# Key Findings

- Females in China, Indonesia, Japan, and Sweden are more likely than males to believe that nicotine causes cancer; there are no significant gender differences for views on artificial sweeteners.
- In Sweden and the USA, females are less likely to say they would use a COVID-19 vaccine if available. Both genders are equally likely to say they have increased handwashing.
- There are only small differences between genders on hyperbolic discounting, mostly in Japan (where males are more likely to prefer \$100 today) and the UK (where females more likely to prefer \$100 today).

# Perceptions of gender inequality vary widely across markets, with females and non-nicotine users mostly more concerned

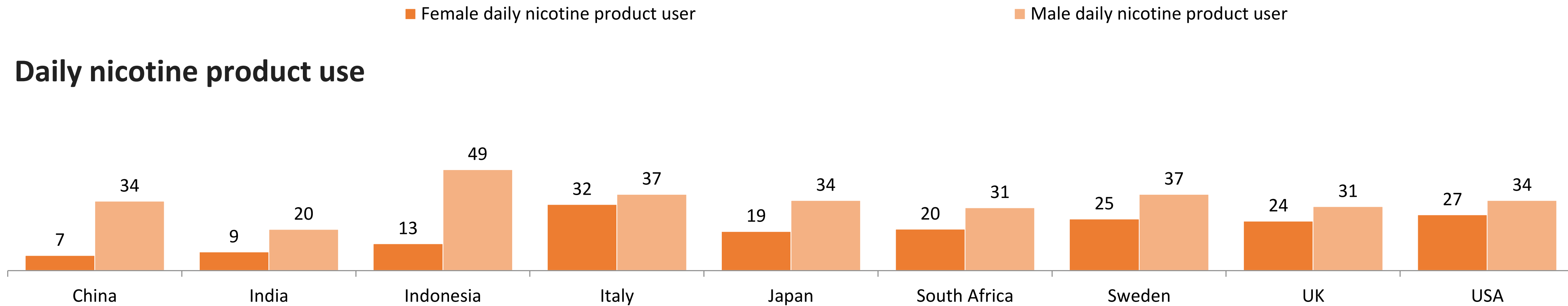
Perceived Seriousness of Unequal Treatment of Women, “Very Serious,” by Nicotine Use and Gender, by Country, 2020



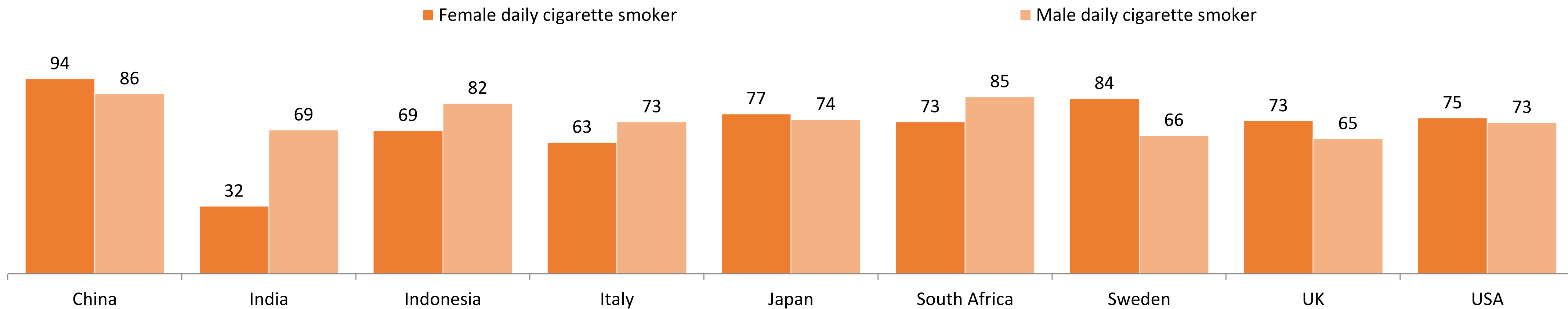
For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious or not at all serious problem. – Unequal treatment of women

# Males are more likely to use nicotine products daily; desire to quit smoking by gender vary across markets

Nicotine Product Use, by Gender, by Country, 2020



## Would like to smoke LESS



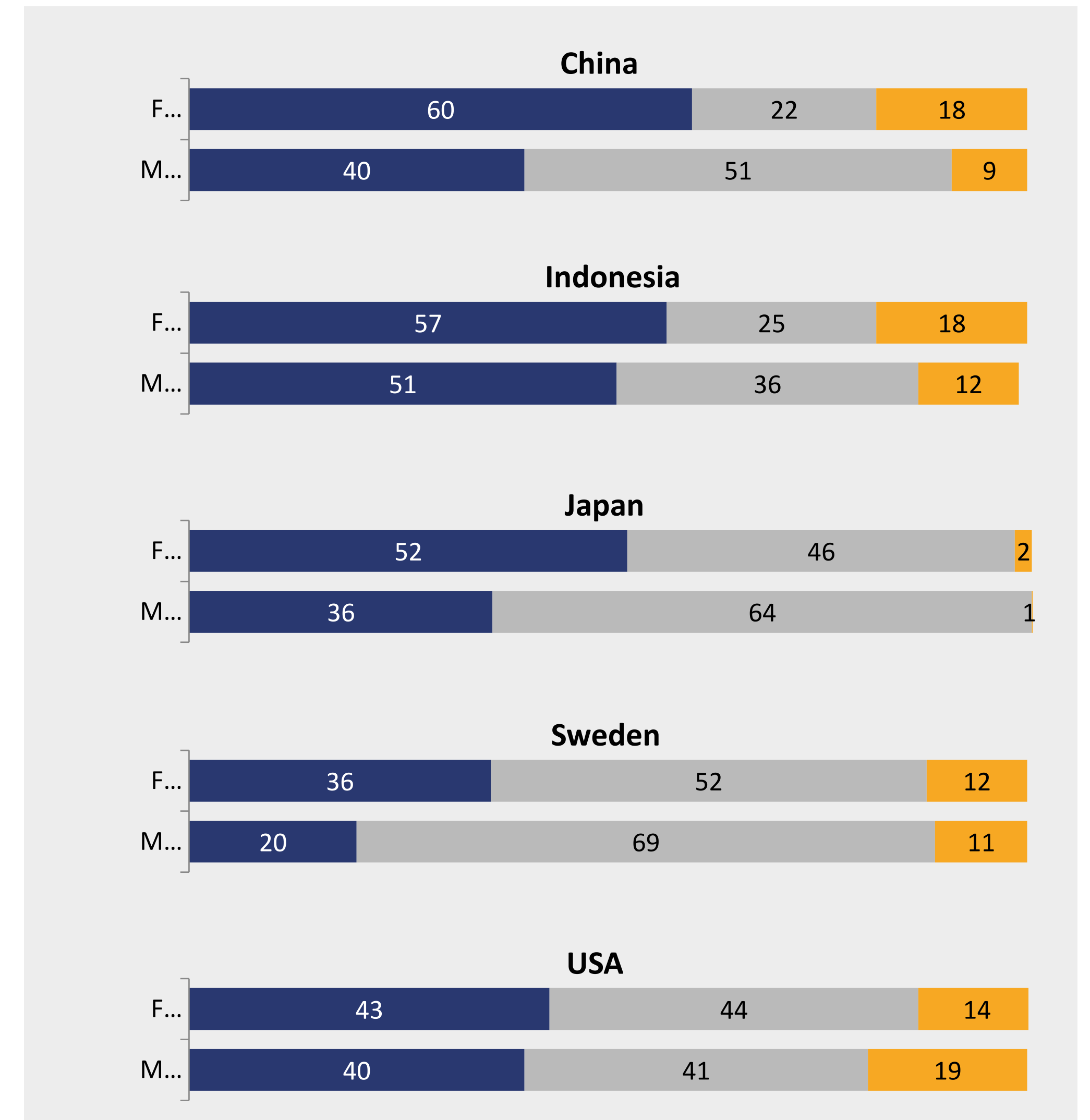
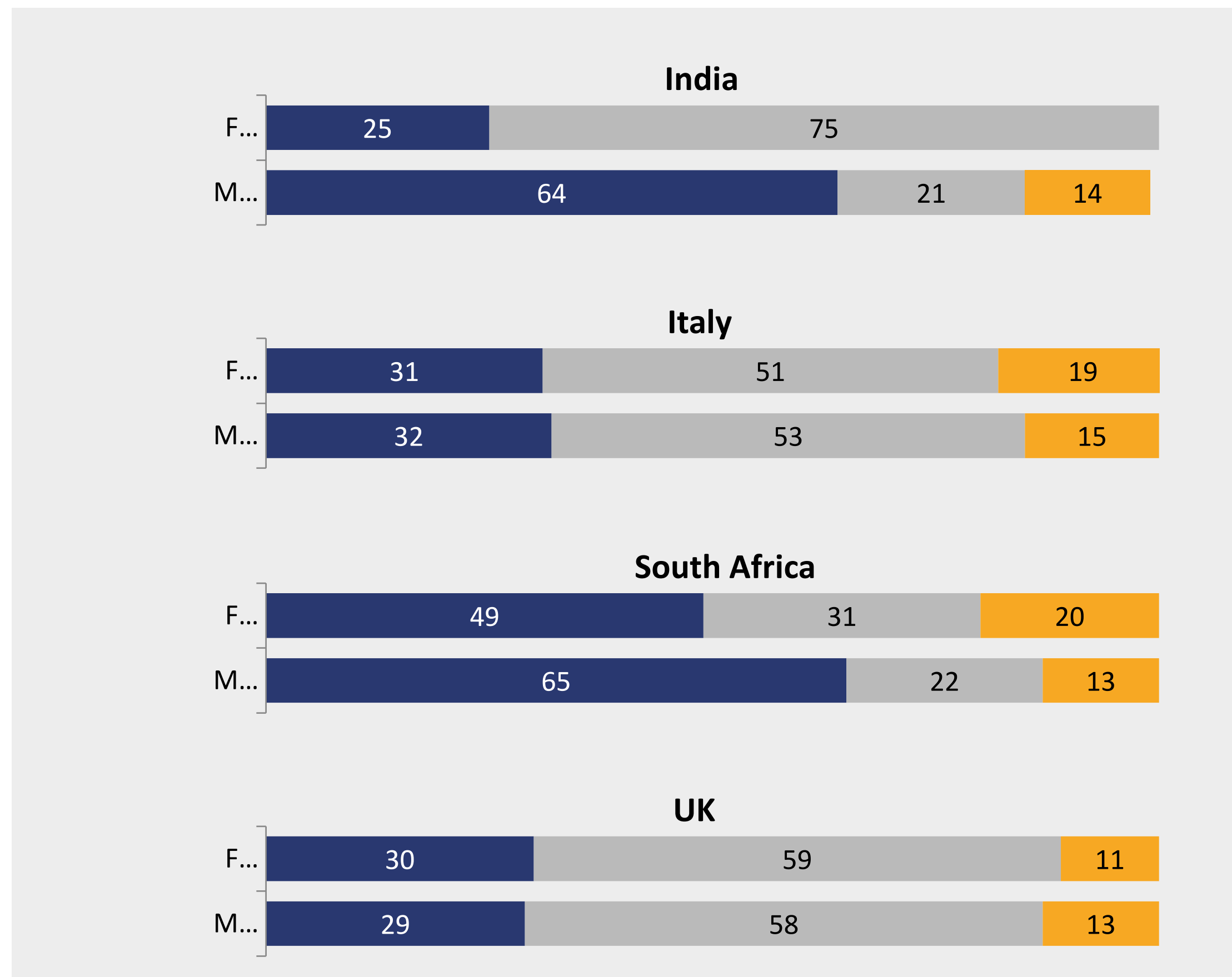
Next are some questions about some things you may do from day to day. Do you do any of the following?

Do you want to make changes to this behavior over the next year?

# Females in several markets more likely than males to say pandemic increased their desire to quit using nicotine products, but India and South Africa shows reverse pattern

Impact of COVID-19 on Desire to Quit, Subsample: Nicotine Users, by Gender, by Country, 2020

Increased desire to quit
  Had no effect
  Decreased desire to quit



Quitting cigarettes is more often seen as by males as one of the most effective changes with a positive impact on health, consistent across the markets

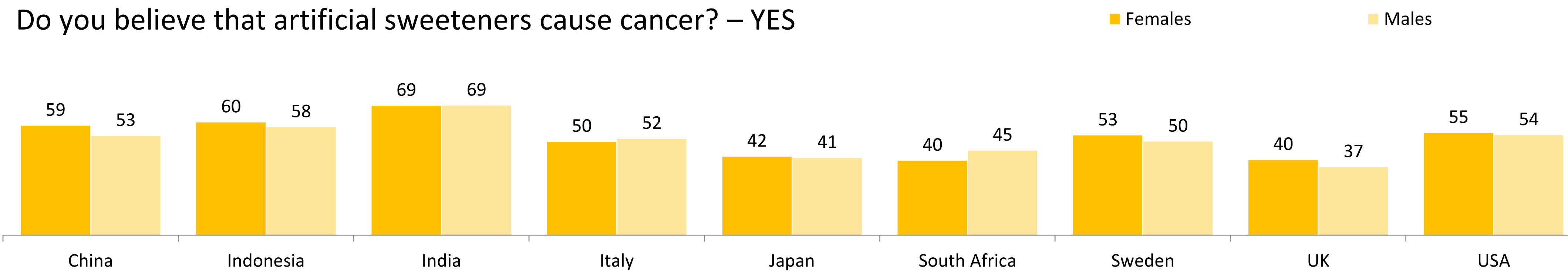
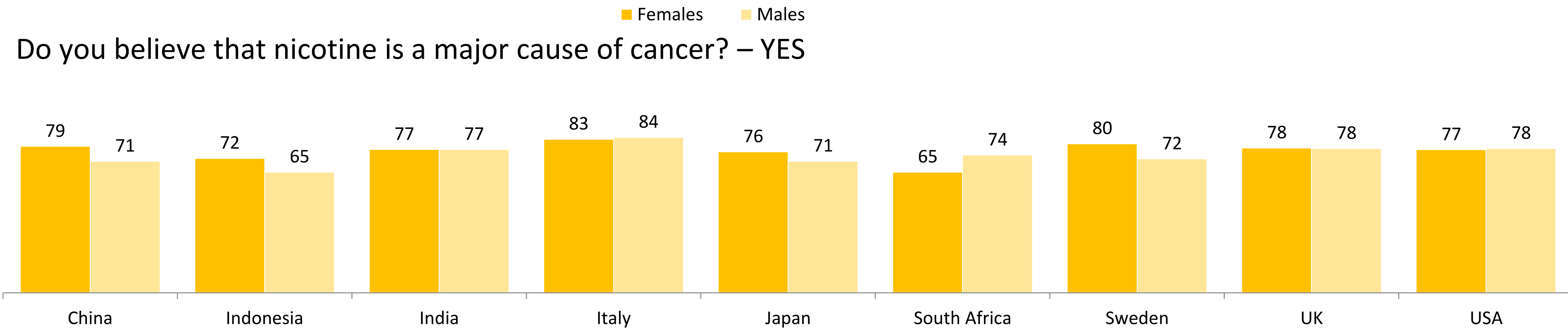
Most Impactful Healthy Behaviors, by Gender, by Country, 2020

	China		India		Indonesia		Italy		Japan		South Africa		Sweden		United Kingdom		United States	
	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male
Getting more physical activity	66	68	50	49	36	35	61	59	47	47	54	56	59	60	53	47	56	56
Quitting cigarettes	25	31	20	27	52	54	44	45	36	41	31	39	36	45	39	41	32	36
Eating less fatty and sugary foods	35	31	33	32	35	31	45	41	34	28	54	43	31	29	49	47	43	37
Drinking less alcohol each day	10	18	17	17	35	35	7	8	18	17	24	24	17	16	18	21	13	17
Spending more time relaxing and/or meditating	21	18	29	30	17	14	15	12	30	28	15	13	19	11	15	10	16	16
Spending less time sitting	25	18	12	8	3	4	14	18	15	10	7	9	23	20	9	12	13	14
Taking medications regularly	4	4	17	17	4	4	1	3	1	3	5	5	2	3	4	4	7	6



# Females in China, Indonesia, Japan, and Sweden are more likely than males to believe that nicotine causes cancer

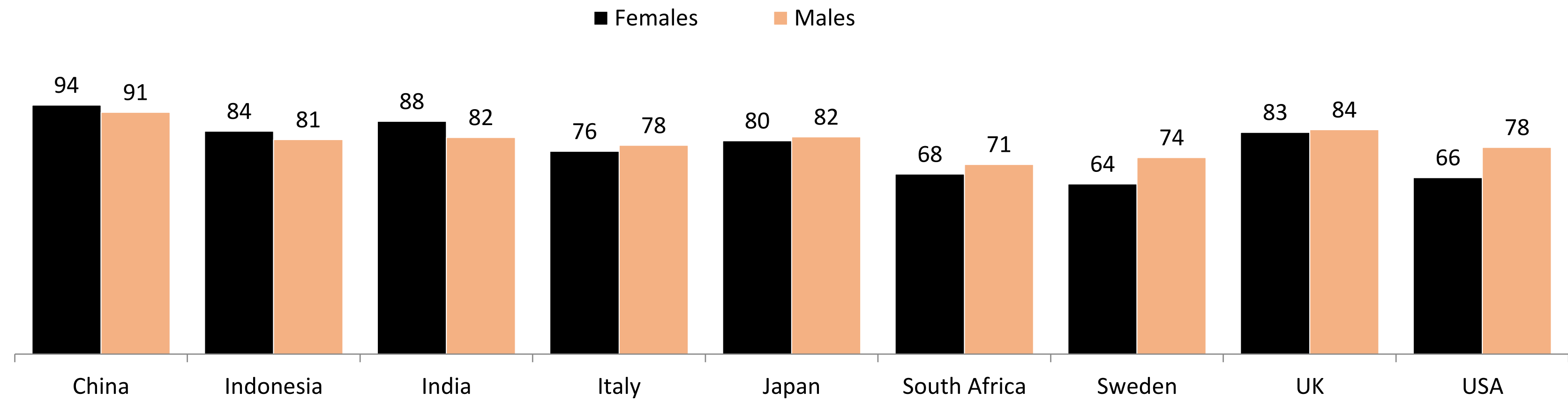
## Believe Nicotine/Sweeteners Cause Cancer, by Gender, by Country, 2020



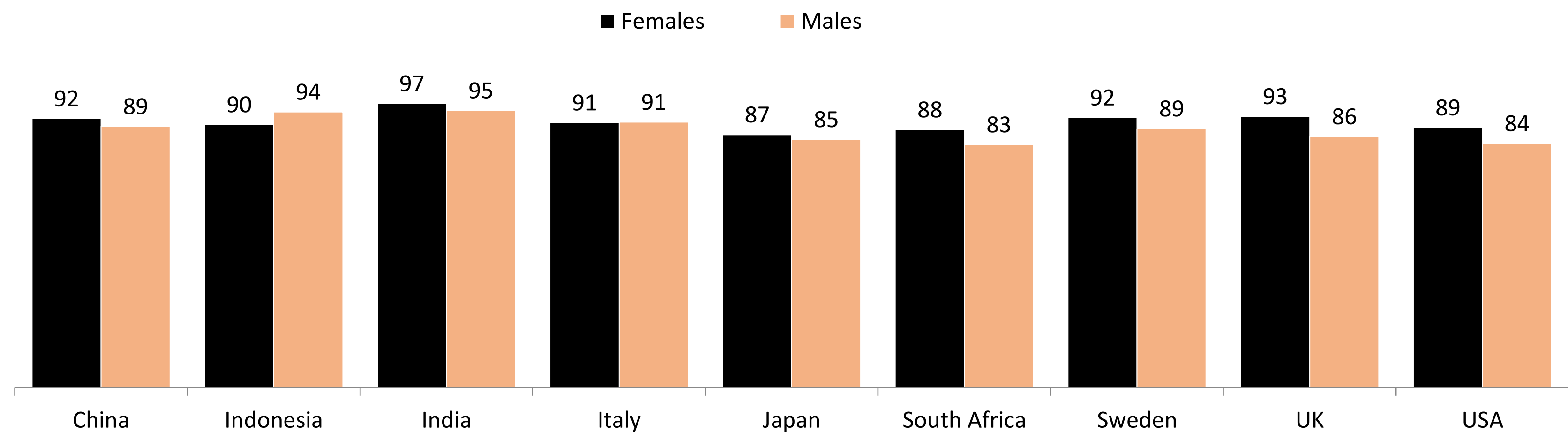
# In Sweden and USA, females are less likely to say they would use a COVID-19 vaccine if available

## Would Use COVID-19 Vaccine, by Gender, by Country, 2020

If a vaccine to prevent COVID-19 were available, would you use it? – YES

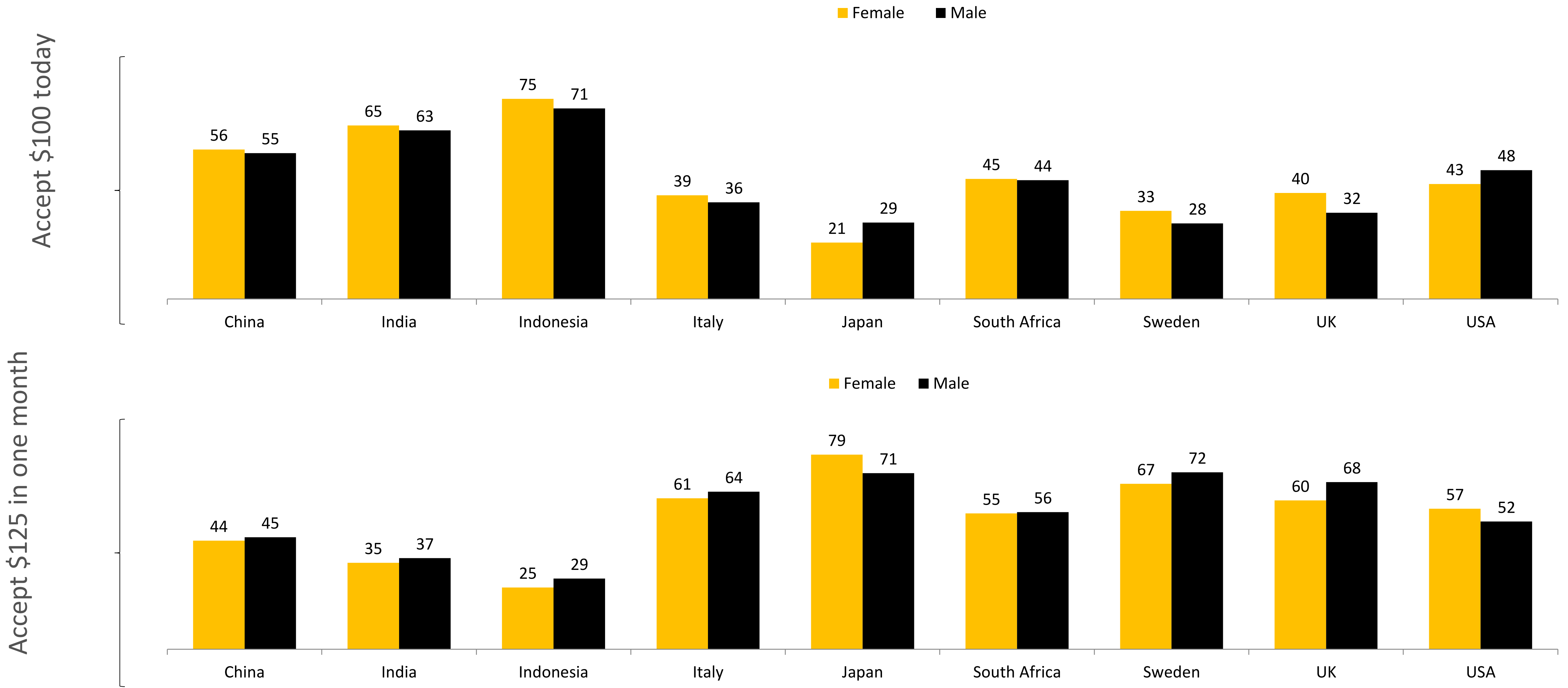


Have you increased your handwashing daily over the last 2 months? – YES



# There is little difference between genders on hyperbolic discounting, mostly in Japan and the UK

## Hyperbolic Discounting, by Gender, by Country, 2020



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