

SURVEY OF CURRENT & FORMER LEGAL-AGE SMOKE-FREE USERS: INDIA

KEY SPECIFICATIONS

AUDIENCE: CURRENT & FORMER LEGAL-AGE SMOKE-FREE PRODUCT USERS

GEOGRAPHY: NATIONWIDE

SAMPLE: n=2,000

RESEARCH AGENCY: POVADDO

TIMING: 30 AUG - 7 SEPT 2021

Q1. What is your age?

63% 18-34

34% 35-54

2% 55+

Q2. What is your gender?

69% Male

31% Female

Are you – or is any member of your immediate family – currently employed with/as: (RANDOMIZE)

	Yes	No
Q3. A newspaper, radio, or television station	0%	100%
Q4. A market research or opinion research firm	0%	100%
Q5. An elected official or in a policy making role in government	0%	100%

Please indicate how familiar you are with each of the following products...(RANDOMIZE)

	Very familiar	Somewhat familiar	Know what they are, but not very familiar	Not at all familiar	Total Familiar	Total Not Familiar
Q6. E-cigarettes, also referred to as an electronic cigarettes or e-vapor	65%	26%	7%	2%	91%	9%
Q7. Heated tobacco products, also referred to as heat-not-burn tobacco products	51%	32%	10%	7%	83%	17%
Q8. Cryptocurrency	69%	24%	5%	1%	93%	7%
Q9. Pesticides	61%	28%	8%	3%	89%	11%
Q10. Virtual reality (VR) headsets	68%	26%	5%	2%	93%	7%

Q11. Do you currently use **e-cigarettes**?

69% Yes
31% No

Q12. [ASK IF Q11=1] How frequently do you currently use **e-cigarettes**?

64% Regularly (multiple times a week)
35% Occasionally
1% Rarely

Q13. [ASK IF Q11=1] Did you use **e-cigarettes** on a regular or occasional basis prior to September 2019?

90% Yes
10% No

Q14. [ASK IF Q11=2] Have you ever used **e-cigarettes** in the past?

74% Yes
26% No

Q15. [ASK IF Q14=1] How frequently did you use **e-cigarettes** in the past?

25% Regularly (multiple times a week)
66% Occasionally
9% Rarely

Q16. [ASK IF Q14=1] Did you use **e-cigarettes** on a regular or occasional basis at any point within the past two years (between September 2019 and now)?

69% Yes
31% No

Q17. [ASK IF Q14=1] Did you use **e-cigarettes** on a regular or occasional basis more than two years ago (prior to September 2019)?

73% Yes
27% No

Q18. Do you currently use **heated tobacco products**, also referred to as heat-not-burn tobacco products?

66% Yes
34% No

Q19. [ASK IF Q18=1] How frequently do you currently use **heated tobacco products**?

56% Regularly (multiple times a week)
39% Occasionally
4% Rarely

Q20. [ASK IF Q18=1] Did you use **heated tobacco products** on a regular or occasional basis prior to September 2019?

89% Yes
11% No

Q21. [ASK IF Q18=2] Have you ever used **heated tobacco products** in the past?

50% Yes
50% No

Q22. [ASK IF Q21=1] How frequently did you use **heated tobacco products** in the past?

21% Regularly (multiple times a week)
58% Occasionally
21% Rarely

Q23. [ASK IF Q21=1] Did you use **heated tobacco products** on a regular or occasional basis at any point within the past two years (between September 2019 and now)?

67% Yes
33% No

Q24. [ASK IF Q21=1] Did you use **heated tobacco products** on a regular or occasional basis more than two years ago (prior to September 2019)?

74% Yes
26% No

SCREENING CRITERIA

continue survey if respondent is a current OR former user of e-cigarettes OR heated tobacco products

Q12=1,2

OR

Q15=1,2

OR

Q19=1,2

OR

Q22,1,2

Now, thinking about regular / ordinary cigarettes...

Q25. Do you currently use **cigarettes**?

87% Yes
13% No

Q26. [ASK IF Q25=1] How frequently do you currently use **cigarettes**?

74% Regularly (multiple times a week)
24% Occasionally
2% Rarely

Q27. [ASK IF Q25=1] Did you use **cigarettes** on a regular or occasional basis prior to September 2019?

94% Yes
6% No

Q28. [ASK IF Q25=2] Have you ever used **cigarettes** in the past?

69% Yes
31% No

Q29. [ASK IF Q28=1] How frequently did you use **cigarettes** in the past?

40% Regularly (multiple times a week)
48% Occasionally
12% Rarely

Q30. [ASK IF Q28=1] Did you use **cigarettes** on a regular or occasional basis at any point within the past two years (between September 2019 and now)?

61% Yes
39% No

Q31. [ASK IF Q28=1] Did you use **cigarettes** on a regular or occasional basis more than two years ago (prior to September 2019)?

80% Yes
20% No

And finally, thinking about **other types of tobacco products** including bidis, cigars, cigarillos, tobacco pipes, shisha, paan, gutkha and other oral products containing tobacco...

Q32. Do you currently use **other types of tobacco products**?

65% Yes
35% No

Q33. [ASK IF Q32=1] How frequently do you currently use **other types of tobacco products**?

55% Regularly (multiple times a week)
39% Occasionally
6% Rarely

Q34. [ASK IF Q32=1] Which of these **other types of tobacco products** do you currently use?
Please check all that apply.

72% Paan, Gutkha or other oral products containing tobacco
66% Cigars/Cigarillos
50% Tobacco pipes
31% Bidis
22% Shisha
1% Other (please specify)

Q35. [ASK IF Q32=1] Did you use **other types of tobacco products** on a regular or occasional basis prior to September 2019?

91% Yes
9% No

Q36. [ASK IF Q32=2] Have you ever used **other types of tobacco products** in the past?

38% Yes
62% No

Q37. [ASK IF Q36=1] How frequently did you use **other types of tobacco products** in the past?

18% Regularly (multiple times a week)
53% Occasionally
30% Rarely

Q38. [ASK IF Q36=1] Which of these **other types of tobacco products** did you use on a regular or occasional basis in the past? *Please check all that apply.*

- 62% Paan, Gutkha or other oral products containing tobacco
 - 50% Cigars/Cigarillos
 - 30% Tobacco pipes
 - 31% Bidis
 - 25% Shisha
 - 3% Other (please specify)
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Q39. [ASK IF Q36=1] Did you use **other types of tobacco products** on a regular or occasional basis at any point within the past two years (between September 2019 and now)?

- 60% Yes
 - 40% No
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Q40. [ASK IF Q36=1] Did you use **other types of tobacco products** on a regular or occasional basis more than two years ago (prior to September 2019)?

- 72% Yes
 - 28% No
-

Thinking once again about e-cigarettes and heated tobacco products...

Q101. Please select the main reason that you currently use or previously used e-cigarettes or heated tobacco products:

- 45% A better alternative to smoking cigarettes, bidis or pipe
 - 18% A healthier alternative
 - 13% Recreation
 - 12% Less smoke
 - 6% Less smell
 - 5% Less disturbance to others
 - 1% Other (explain)
-

Q102. Prior to taking this survey, were you aware that e-cigarettes and heated tobacco products were banned here in India, thus making it illegal to sell these products as of September 2019?

- 72% Yes
 - 28% No
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Q103. **[ASK IF Q13=1 OR Q17=1 OR Q20=1 OR Q24=1]** Earlier in this survey you indicated that you used e-cigarettes and/or heated tobacco products on a regular or occasional basis **prior to** September 2019 when these products were banned.

Following the ban of these products in September 2019, did you...
(please select all that apply)

- 39% Continue to use e-cigarettes or heated tobacco products
 - 36% **Permanently** switch to regular cigarettes or other forms of tobacco products
 - 40% **Temporarily** switch to regular cigarettes or other forms of tobacco products
 - 15% **Permanently** quit using all forms of tobacco
 - 11% **Temporarily** quit using all forms of tobacco
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Q104. Do you think that the government should come up with new ways to reduce the harm caused by smoking cigarettes?

- 95% TOTAL YES**
 - 3% TOTAL NO**
 - 71% Yes – definitely
 - 25% Yes
 - 2% No
 - 1% No – definitely not
 - 1% Don't know
-

As you may or may not know, cigarettes burn tobacco to produce smoke, providing smokers with tobacco flavor and nicotine. Burning tobacco also produces thousands of other chemicals. Experts agree that the chemicals created by burning tobacco are the main cause of smoking-related diseases like lung cancer, heart disease, and emphysema.

Products like e-cigarettes, vape, or heated tobacco products do not burn tobacco. They use heat to create a vapor that provides nicotine and flavor. Because there is no burning, the vapor contains fewer harmful chemicals. Many experts believe these “smoke-free” products are better alternatives to cigarettes for people who would otherwise continue to smoke.

Q105. Upon learning this information, do you believe the government should remove the ban on e-cigarettes and heated tobacco products?

81%	TOTAL YES
16%	TOTAL NO
53%	Yes – definitely
28%	Yes
11%	No
6%	No – definitely not
3%	Don’t know

Q106. Do you believe alternative products like e-cigarettes and heated tobacco products should be just as accessible to adult smokers as regular cigarettes?

87%	TOTAL YES
11%	TOTAL NO
52%	Yes – definitely
35%	Yes
8%	No
4%	No – definitely not
2%	Don’t know

Q107. Do you believe that products like e-cigarettes and heated tobacco products are a better alternative to cigarettes?

86%	TOTAL YES
12%	TOTAL NO
51%	Yes – definitely
35%	Yes
8%	No
4%	No – definitely not
3%	Don’t know

Q108. [ASK IF Q25=1 OR Q32=1] Earlier in the survey, you indicated that you currently use cigarettes or other types of tobacco products.

Would you consider switching to a smoke-free alternative product (such as an e-cigarette, heated tobacco product, or tobacco/nicotine pouch) if it were legal, met quality and safety standards, and were conveniently available?

92%	TOTAL YES
6%	TOTAL NO
60%	Yes – definitely
32%	Yes
5%	No
1%	No – definitely not
2%	Don't know

Now, just a few final questions for statistical purposes...

D1. Thinking about national level elections in this country, do you tend to vote in these elections all of the time, most of the time, some of the time, rarely, or never?

68%	All of the time
26%	Most of the time
4%	Some of the time
1%	Rarely
1%	Never

D2. How interested would you say you are in politics and public policy issues? Would you say you are...

94%	TOTAL INTERESTED
6%	TOTAL NOT INTERESTED
59%	Very interested
35%	Somewhat interested
5%	Not very interested
1%	Not interested at all

D3. During an average week, how often would you say you have talked about government, politics, or society with your family, friends, or co-workers?

67%	Several times a week
31%	Once or twice
2%	Not at all

D4. Which political party are you most likely to support in the next General Election?

66% BJP
25% Congress
9% Other; please specify _____

D5. Do you have a university-level education?

94% Yes
6% No

D6. **[IF D5= YES, ASK]** Do you have a university degree in law, medicine, science, engineering, or technology/IT?

18% No
4% Yes - Law
5% Yes - Medicine
14% Yes - Science
25% Yes - Engineering
44% Yes – Technology/IT

D7. In what class do you consider your household to be? (ROTATE)

16% High income
39% Upper Middle Income
38% Middle Income
6% Lower Middle Income
1% Low Income

D8. In which state or territory do you live?

30% North India
2% Northeast India
2% Central India
13% East India
28% Western India
25% South India

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