

India Adult Smoker Survey: Results

KEY SPECIFICATIONS

AUDIENCE: SMOKERS AGED 18+ IN INDIA

SAMPLE SIZE: n=813

Delhi: n=203

Mumbai: n=203

Kolkata: n=203

Chennai: n=203

METHOD: Face-to-face

FIELD DATES: July 29-August 10, 2016

RESEARCH SUPPLIER: IPSOS

COMMISSIONING ORGANIZATION: factasia.org

EXECUTIVE SUMMARY

The results contained in this report are derived from an face-to-face survey conducted from July 29-August 10, 2016 among adult smokers aged 18+ in India. A total of 813 interviews were conducted by Ipsos on behalf of factasia.org. This study carries a margin of error of $\pm 3.5\%$ at the 95% confidence level.

The research found that awareness of e-cigarettes is low among adult smokers in India (19%), and only 1% report being regular or occasional users of e-cigarettes.

Despite low levels of awareness and usage of e-cigarettes, most agree on the Government's role regarding less harmful alternatives:

- Eight in ten adult smokers (80%) agree they should have the right to access information about less harmful alternatives to cigarettes.
- Three-fourths (76%) agree the Government should be encouraging them to switch to less harmful products by easing fiscal and regulatory policies.
- A large majority (73%) also agrees that it would be wrong for the Government to prevent or delay the introduction of less harmful alternatives.

Finally, the research found that two-thirds of adult smokers (66%) agree that "e-cigarettes represent a positive

alternative to today's cigarettes," and that an even greater number (69%) would "consider switching to e-cigarettes if they were legal, met quality and safety standards, and were conveniently available like regular tobacco products."

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S1. First, how old are you?

0%	Under 18	(TERMINATE)
15%	18-24	
25%	25-29	
15%	30-34	
15%	35-39	
14%	40-44	
5%	45-49	
8%	50-54	
2%	55-59	
1%	60-64	
0%	65 or older	

S2. Next, what is your gender?

70%	Male
30%	Female

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

(RANDOMIZE)		<u>% YES</u>	<u>% NO</u>
S3.	An advertising or public relations agency	0%	100%
S4.	A newspaper, radio, or television station	0%	100%
S5.	A market research or opinion research firm	0%	100%
S6.	An elected official	0%	100%
S7.	A senior or policy making role in government	0%	100%

[IF YES TO ANY S3-S7: TERMINATE]

S8. Do you ever use tobacco or nicotine containing products such as cigarettes, cigars, pipes, smokeless tobacco products, shisha, or e-cigarettes?

100% Yes
0% No (TERMINATE)
0% Unsure (TERMINATE)

And, for each of the following products, please indicate whether you are a regular user, an occasional user, a former user, or a complete non-user. (RANDOMIZE)

		% Regular User	% Occasional User	% Former User	% Complete Non-User
S9.	Cigarettes	94%	4%	0%	2%
S10.	Cigars	1%	1%	1%	96%
S11.	Pipes	0%	2%	1%	96%
S12.	Shisha	0%	0%	1%	99%
S13.	E-cigarettes	0%	1%	0%	99%

Thinking about e-cigarettes and other products...

Q1. Have you recently seen, read, or heard anything about e-cigarettes?

19% Yes
68% No
13% Unsure

Q2. Regardless of whether you have recently seen, read, or heard, something about e-cigarettes, how familiar would you say you are with e-cigarettes?

3% Very familiar
24% Somewhat familiar

9%	Not very familiar
45%	Not at all familiar
19%	Unsure

As you may know, e-cigarettes are battery powered devices that vaporize nicotine liquid to create an inhalable aerosol. E-cigarettes do not contain tobacco leaf and come in various shapes and sizes, and can be disposable, rechargeable, or refillable.

As you may know, in Europe and the USA, e-cigarettes are widely available and millions of people use them. Public health experts agree that they are probably much less harmful than cigarette smoking because they do not burn tobacco. Some public health experts believe they should be widely available for smokers to use instead of cigarettes. While others think they are not an effective method for smoking cessation and are concerned they could be a “gateway” to smoking among youth.

You will now be shown a number of statements made about e-cigarettes. For each of the following, please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree

		% Str. Agree	% Smwht. Agree	% Smwht. Disagree	% Str. Disagree	% Unsure	% Total Agree	% Total Disagree
Q4.	E-cigarettes represent a positive alternative to today's conventional cigarettes.	12%	54%	8%	15%	11%	66%	23%
Q5.	I would consider switching to e-cigarettes if they were legal, met quality and safety standards, and were conveniently available like regular tobacco products.	16%	53%	9%	14%	8%	69%	23%
Q6.	It would be wrong for the Government to prevent or delay the introduction of less harmful alternatives to cigarettes for adult smokers.	22%	51%	10%	14%	3%	73%	24%
Q7.	Through tax and regulatory policies, the Government should encourage adult smokers to switch to less harmful alternatives to cigarettes and ensure they are not used by youth.	24%	52%	10%	11%	2%	76%	21%
Q8.	If a new product is scientifically proven to have the potential to reduce the risk of smoking as compared to conventional cigarettes, adult smokers should have the right to access this information.	27%	53%	6%	11%	2%	80%	17%

Now, I have just a few more questions for statistical purposes...

ASKED AMONG REGULAR OR OCCASIONAL E-CIGARETTE USERS; n=8

D1. How long have you used e-cigarettes?

25%	Less than 3 months
0%	3 to 6 months
12%	6 to 9 months
25%	9 to 12 months
13%	12 to 18 months
0%	18 to 24 months
13%	Longer than 24 months
12%	Unsure

ASKED AMONG REGULAR OR OCCASIONAL E-CIGARETTE USERS; n=8

D2. Why did you start using e-cigarettes? (CHECK ALL THAT APPLY)

75%	As an alternative to regular cigarettes
50%	Convenience
37%	Flavors
0%	Price
12%	Unsure
0%	Other

ASKED AMONG REGULAR OR OCCASIONAL E-CIGARETTE USERS; n=8

D3. Where do you predominately buy your e-cigarettes?

75%	Specialty e-cigarette store
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25%	Convenience store
0%	Kiosk
0%	Grocery
0%	Unsure

ASKED AMONG OCCASIONAL E-CIGARETTE USERS; n=5

D4. What has kept you from using e-cigarettes more? (CHECK ALL THAT APPLY)

80%	Price
40%	Have not found them to be suitable alternative to regular cigarettes
0%	Accessibility to e-cigarettes
0%	Flavor
0%	Unsure

D5. Level of Education

1%	Primary or below
35%	Secondary
63%	Tertiary or above

D6. Monthly Household Income

1%	Below INR 7,000
79%	INR 7,000 – 29,999
21%	INR 30,000 and above
0%	Refused
