



The Global Innovation Gap

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Next Generation Nicotine Delivery USA

April 24, 2018

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Death-by-smoking

#1 preventable cause of cancer, CVD & lung diseases in the world

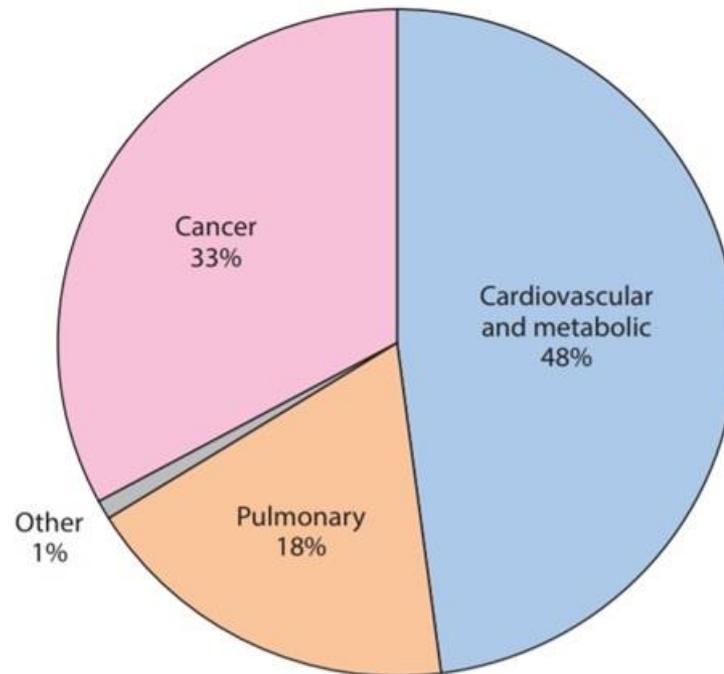


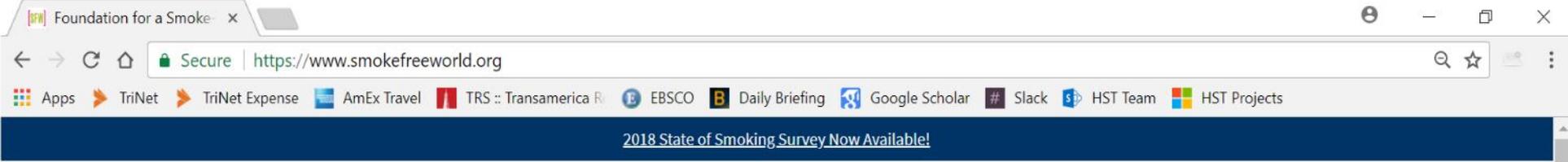
Figure 4

Between 1965 and 2015, active and passive smoking killed 21 million people. Although most discussion of smoking and disease focuses on cancer, cardiovascular disease and metabolic and noncancer pulmonary disease kill most smokers (134).

Foundation for a Smoke-Free World

- **New Foundation:** formation, objectives, strategy
- **Urgent need:** innovation in smoking cessation and harm reduction
- **Call for Action:** manufacturers, public health leaders and users

www.smokefreeworld.org



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ADVANCING GLOBAL PROGRESS IN SMOKING CESSATION & HARM REDUCTION

STATE OF SMOKING 2018

A review of progress in select countries around the world reveals both common and distinct challenges facing smokers in their struggles to quit

GLOBAL SURVEY RESULTS

The Foundation has announced results from a **Global Survey** of more than **17,000 smokers in 13 countries**, and made findings available for public review

HELPING FARMERS

Working collaboratively to achieve a beneficial agricultural transformation in developing countries as tobacco demand falls

Our purpose

*...to improve global health by
ending smoking in this generation
and
to help small holder tobacco farmers
transition to alternative livelihoods*

New foundation: formation



President Derek Yach calls for *“a wide range of solutions that allow individual smokers to select the smoking cessation method that works best for his or her situation and, more importantly, reduce the harm, disease, and death that is caused by smoking.”*



One Billion Smokers

Where do we start? Focus on people

*Global survey of 17,421
smokers, ex-smokers & non-smokers
in 13 countries*

Global survey

Countries
Brazil
France
Greece
Israel
India
Japan
Lebanon
Malawi
New Zealand
Russia
South Africa
United Kingdom
United States

Methodology

Quantitative: Global Survey

- More than 17,000 participants
- 13 countries; 7 languages
- Representative of general population >18 years
- 3 profiles: smokers, ex-smokers, non-smokers

Qualitative: Focus Groups

- Major cities in 7 of the 13 countries
- Smokers who tried to quit at least once
- Ex-smokers
- Providing additional context and insights

Conducted by Kantar Public

FOUNDATION FOR A
SMOKE-FREE WORLD

Global survey focus groups

Smokers' experiences and challenges

Physical

- Intense need/craving
- Hard to concentrate
- Insomnia
- Weight gain



Behavioral

- Habit
- Ritual: routines
(with coffee, in car...)
- Have something in hand
- Social, going out w/ friends



Emotional

- Pleasure
- Calms stress/anger/anxiety
- Irritable when not smoking
- Inclusion w/other smokers
- Helps w/boredom

- Smoking isn't just a physical addiction for smokers
- It's a deeply engrained behavioral, emotional & social part of their lives

Top line findings: most smokers...

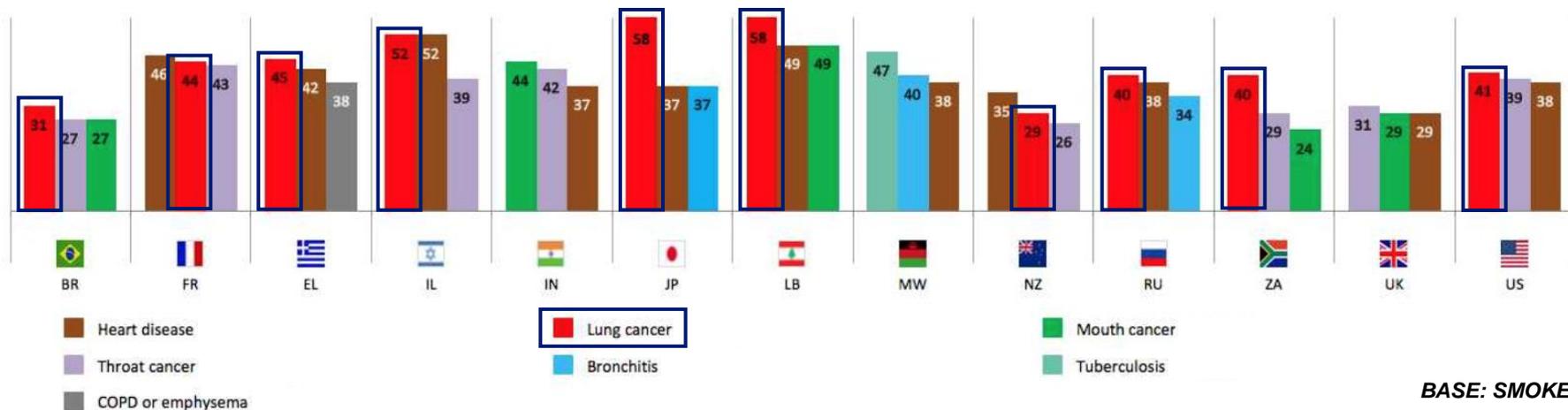
- have friends who smoke
- partners/spouses smoke
- know smoking is harmful
- believe they are addicted
- see themselves as less healthy
- are less likely to see a doctor
- try to quit without assistance

Smoking is linked to daily rituals & routines

Most smokers: “nicotine causes cancer”

Based on what you know or believe, does nicotine in products like electronic cigarettes cause... (multiple answers possible)

(%, Top 3 answers per country – smokers)

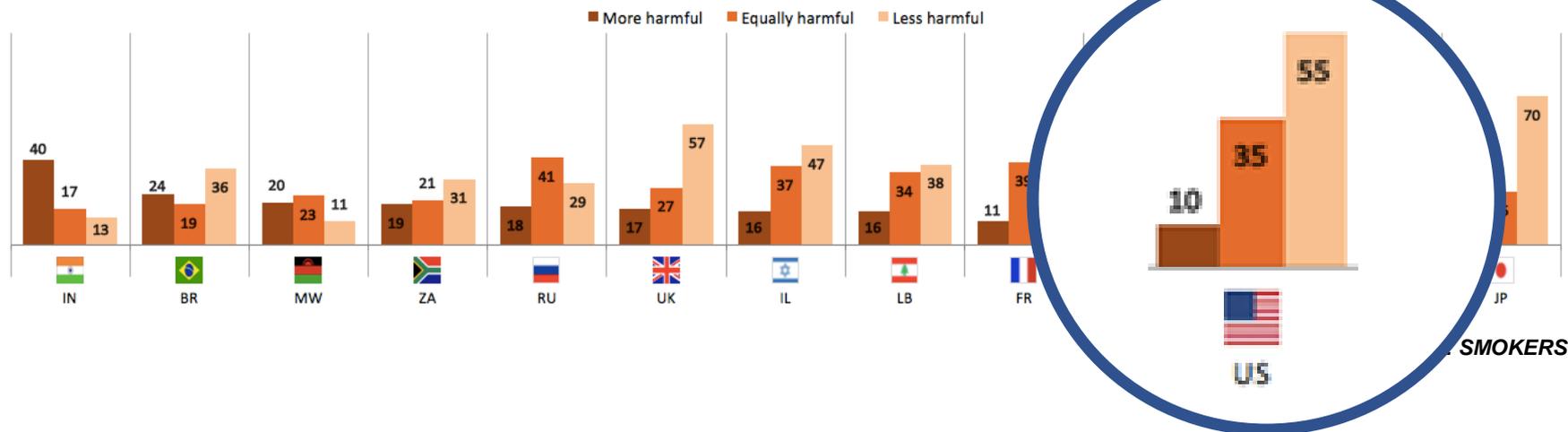


BASE: SMOKERS

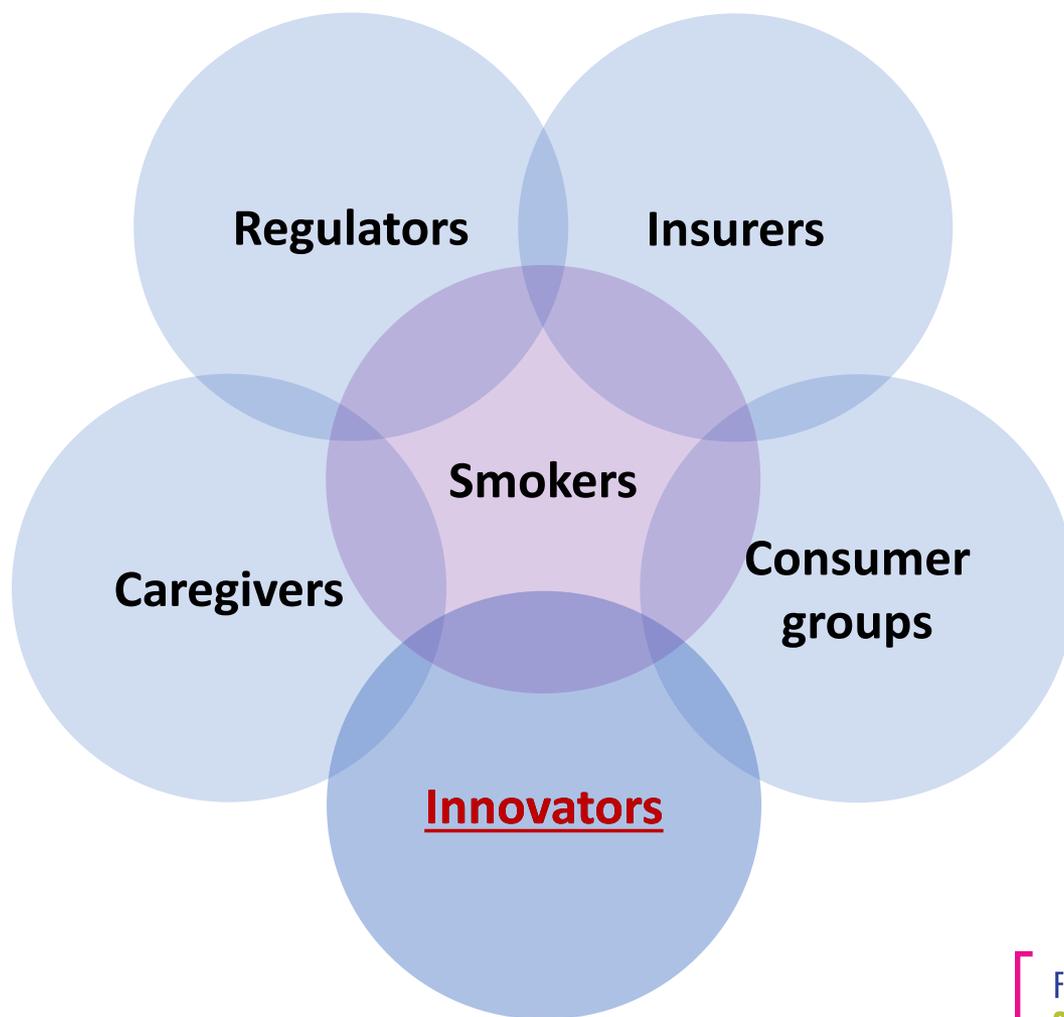
Many: “vaping is as harmful as cigarettes””

Do you think e-cigarettes and vaping devices are more or less harmful than smoking regular cigarettes?

(% smokers)



Smoking cessation: spheres of influence



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Among our early areas of exploration

- Innovation to improve the efficacy of smoking cessation therapies
- Innovation to ensure access in low- and middle-income countries

The Innovation Gap

The innovation gap: efficacy

Only 3-6% of unassisted quit attempts are successful. Current products and services only double that. This is unacceptable.

Need: Catalyze and accelerate development of new smoking cessation interventions with $\geq 50\%$ efficacy

Scope: Products and services for smoking cessation (pharmacotherapies; counselling; apps; wearables; etc.)

Means: Competitive R&D grants; convene VCs and innovators; public-private product development partnerships (PDPs); incubators; innovation prizes; patent pools?

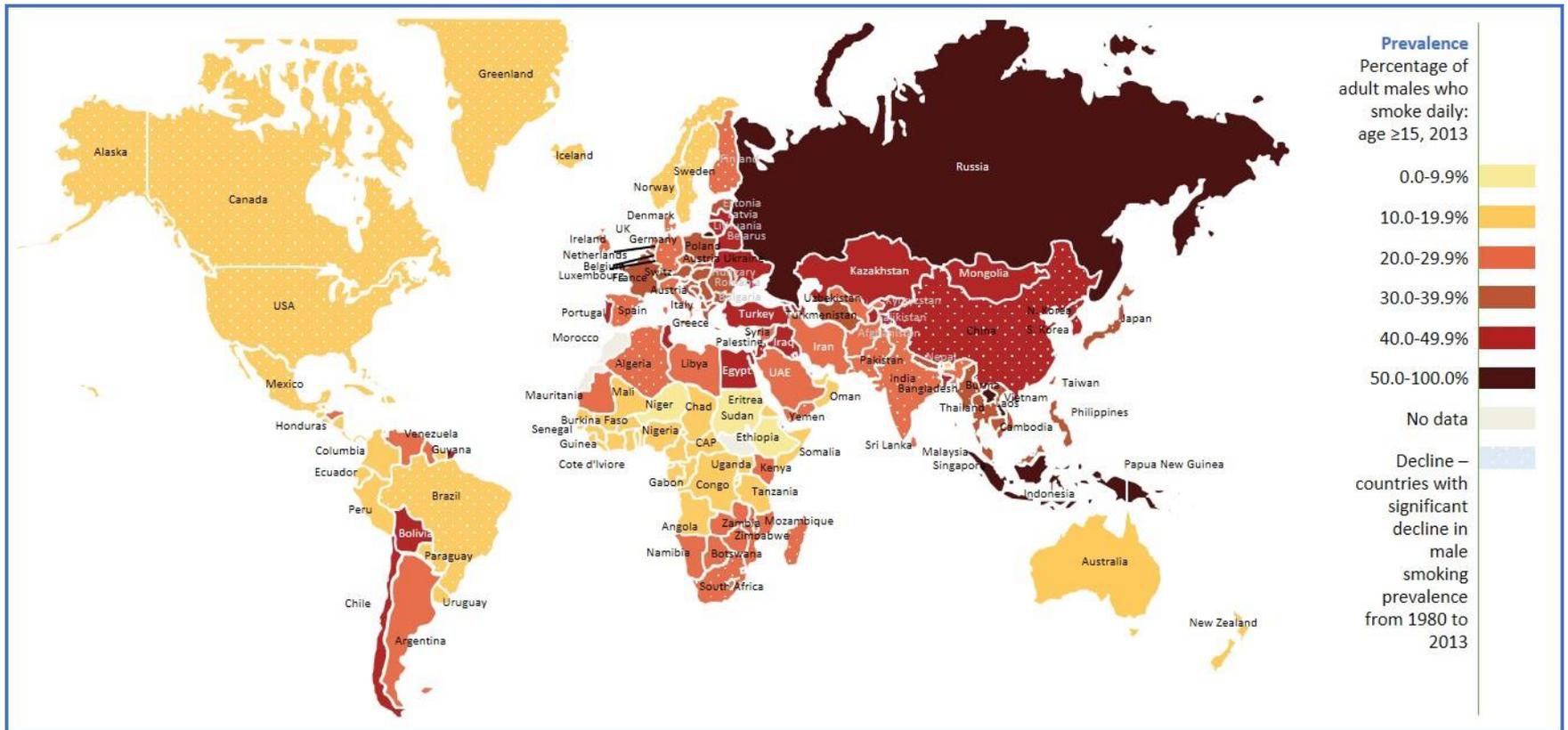


80% of smokers

live in low- & middle-income countries



Male smoking prevalence by country



The innovation gap: access

Low- and middle-income countries (LMICs): local manufacture (e.g., bidis in India) makes smoking affordable even to the poorest*

Rapid economic growth in some LMICs is leading to increased consumption of branded cigarettes (associated with high-status)*

Cigarette use in high-income countries is declining, but increasingly concentrated in low-income, vulnerable, marginalized populations*

As we drive innovation in cessation & harm reduction, we must also steer innovation to reach the poorest and most vulnerable (interventions must be acceptable, affordable, accessible)

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33 Million Tobacco Farmers in the World



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Thank you!

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