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**CONSUMPTION OF TOBACCO AND NICOTINE PRODUCTS AND
ATTITUDE TOWARDS ANTI-TOBACCO MEASURES: **OCTOBER 2024****

ANALYTICAL REPORT



October 2024

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The All-Ukrainian survey “Consumption of tobacco and nicotine products and attitude towards anti-tobacco measures” was conducted by Kyiv International Institute of Sociology in September-October 2024 as part of the regular “Omnibus” commissioned by the NGO Advocacy Center “Life”. During the research, we studied the opinions and views of Ukrainian adult residents (aged 18 and older) on various issues related to the consumption of tobacco and nicotine products. The following are the main research stages: developing and programming a questionnaire (we used OSA for CATI), generating mobile phone numbers, conducting interviews with respondents, quality control of the work performed, preparing the final data set, weighting the data set, preparing one-dimensional distribution tables and an analytical report. Anton Grushetskyi, KIIS executive director, prepared the analytical report. Experts of the NGO Advocacy Center “Life” Oksana Levytska, Dmytro Kupyra, and Olha Masna analyzed the results and suggested additions and corrections that were included in the report.

The survey was conducted via computer-assisted telephone interviews (CATI) method. According to KIIS survey conducted via personal (face-to-face) interviews method using a random sample in July 2021, 96% of Ukrainian adult residents had personal mobile phones. To conduct the survey, at the initial stage mobile phone numbers (for all major mobile operators of Ukraine) were generated in a completely random way. The share of generated numbers belonging to each mobile operator was roughly proportional to the share of the total mobile numbers belonging to each mobile operator (according to KIIS surveys). To eliminate invalid numbers from the generated database, an “invisible” SMS message was sent to the generated numbers. Then the interviewers called the generated numbers and offered respondents (who answered the call) to take part in the survey. The survey was conducted only with respondents aged 18 and older and with those who at the time of the survey lived on the territory controlled by the Ukrainian government. Ukrainian residents who left abroad after February 24, 2022 and did not return were not surveyed. The interview was conducted in Ukrainian or Russian at the choice of the respondent.

After conducting the planned number of completed (full) interviews, the distribution of respondents in the sample by macro-region of residence (West, Center, South, East – see details below), type of settlement (urban or rural), sex, age was compared with official statistics sources. During the interview, respondents reported their place of residence until February 24, 2022, as well as their current (at the time of the interview) place of residence. We used the place of residence until February 24, 2022 for further procedures. The distribution of the entire adult population by macro-regions and type of settlement was based on data from the Central Electoral Commission upon the results of the 2019 parliamentary elections (by the number of registered voters). The age structure was based on the data from the State Statistics Service of Ukraine as of January 1, 2021. To bring the structure of the sample in line with the structure of the Ukrainian population as a whole, we designed special statistical weights. In addition, these weights consider the different probability of

various respondents getting into the sample (depending on the number of mobile phone numbers at use of a particular respondent).

The composition of the macro-regions is as follows: *Western* macro-region – Volynska, Rivnenska, Lvivska, Ivano-Frankivska, Ternopilska, Zakarpatska, Khmelnytska, Chernivetska oblasts; *Central* macro-region – Vinnytska, Zhytomyrska, Sumska, Chernihivska, Poltavska, Kirovohradska, Cherkaska, Kyivska oblasts, Kyiv city; *Southern* macro-region – Dnipropetrovska, Zaporizka, Mykolaivska, Khersonska, Odeska oblasts; *Eastern* macro-region – Donetsk, Luhanska, and Kharkivska oblasts.

The field stage of the research lasted from September 25 to October 8, 2024. In total, 2,019 interviews were conducted as part of the research.

Formally, for standard conditions, the statistical margin of error (with probability of 0.95 and design effect of 1.1) does not exceed:

- 2.4% for indicators close to 50%
- 2.1% for indicators close to 25 or 75%
- 1.5% for indicators close to 10 or 90%
- 1.1% for indicators close to 5 or 95%
- 0.5% for indicators close to 1 or 99%

Comments on the report structure

For macro-region and settlement type the report contains respondents' answers as to where they are currently living, which means at the time of the interview. When it comes to family welfare, these are the categories and their meaning: "very low" – households that don't have enough money even for food; "low" – those who have enough money for food, but no longer enough for clothes; "average" – those who have enough money for both food and clothes, but who don't have enough money to buy some expensive things (television, etc.); "high" – those who can buy some expensive things or can generally afford everything.

At the same time, when interpreting the results among separate categories (separate regions, respondents with different income levels, etc.), it should be considered that since this category has fewer respondents than the sample as a whole, accordingly, the margin of error for this category is higher. It is also necessary to consider the "intersection" between some socio-demographic categories. For example, among younger respondents there are also more people with higher level of wealth. For this purpose, a separate Appendix A has been prepared in the report, where each category – which is the basis for all data provided – has its own number of respondents, margin of error, and socio-demographic profile.

Main survey results



CONSUMPTION OF TOBACCO AND NICOTINE PRODUCTS

- 27% currently consume tobacco or nicotine products (daily or occasionally). Among them, 23% consume these products daily, while the remaining 4% – occasionally.
- Compared to December 2023, the share of those consuming tobacco or nicotine products decreased from 30% to 27%.
- Among current consumers of tobacco or nicotine products, the majority (69%) smoke industrially manufactured cigarettes, although this figure has decreased compared to 2023 (previously, 75% chose this option, for other products compared with 2023, the figures changed within the margin of statistical error). Next are HTPs (23%), electronic cigarettes (16%), hookahs (8%), and self-rolling tobacco (4%). The least mentioned were nicotine pouches (2%).
- The consumption of tobacco or nicotine products is significantly more prevalent among men than women. Among men, 39.5% consume such products, compared to 17% among women (in 2023, the figures were 42.5% and 20%, respectively, but the difference from the current year falls within the margin of statistical error). There is also a general trend showing higher tobacco or nicotine consumption among younger/middle-aged respondents (both men and women). Among those aged 18–59, 29.5–33% consume these products, compared to 20.5% among those aged 60–69 and 11% among those aged 70+.
- The consumption of HTPs, electronic cigarettes, and hookahs is more prevalent among younger respondents. Such products are mostly consumed by respondents aged 18–29. Among those aged 18–29, 45% consume heated tobacco products, 44% consume electronic cigarettes, and 21% – hookahs;



MEDICAL WARNINGS ABOUT THE HARM OF SMOKING

- Almost all cigarette smokers – 94% (94% among men and 95% among women) – noticed warnings about the harm of smoking on cigarette packs within the past month.
- The majority of cigarette-smoking respondents – 62% – claim that medical warnings on cigarette packs over the past two months motivated them to take certain actions. The most common response was that they thought about quitting smoking (44.5% of cigarette-smoking respondents). Additionally, 35% considered the health risks associated with

smoking. One in three respondents (35.5%) attempted to quit smoking (38% among men, 30.5% among women).

- Among HTP smokers, 74% noticed such warnings, while among electronic cigarette smokers, the figure is 61% for the past month. Among HTP consumers, 44.5% claim that medical warnings make them consider quitting smoking, while among e-cigarettes smokers – 49%;



WEBSITE «STOPSMOKING.ORG.UA»

- A total of 13% of respondents are aware of the “stopsmoking.org.ua” website (with 17% of current consumers).
- The most common source of information about the site is the Internet, followed by channels such as television and informational bulletins in healthcare institutions;



ADVERTISING OF TOBACCO AND NICOTINE PRODUCTS

- 43% have seen advertisements for tobacco or nicotine products somewhere in the past month (the same percentage as in 2023).
- 61.5-63% of respondents aged 18-39 noticed advertisements of tobacco and nicotine products and the figure decreases to 17.5% among those aged 70+. 51% of men noticed advertisements for any products, compared to women (37%). However, there is a noticeable difference among non-smokers men and women; non-smokers men noticed such ads more often). The most common location for seeing such advertisements was sales areas, noted by 32% of all respondents (the same as in 2023). Next was banner advertising on the Internet (18%, a slight decrease from 23% in 2023) and on personal pages in social media (17%, decrease from 20% in 2023). Advertisements seen outdoors were reported by 13% of respondents (similar to 14% in 2023).
- The most commonly seen advertisements were for tobacco products, such as regular cigarettes or HTPs (35% of all respondents, the same as in 2023) or HTP devices for heating tobacco (28%, decrease from 31% in 2023). Advertisements for electronic cigarettes were seen by 24% (the same as in 2023), while ads for nicotine pouches were noticed by 14% (increase from 10% in 2023).
- Advertisements for tobacco or nicotine products were slightly more often seen by current consumers (daily or occasional) – 53% compared to 40% among non-consumers. Primarily, consumers reported seeing such advertisements more frequently in sales areas.
- Respondents were also asked whether they had seen advertisements for any tobacco or nicotine products online in specific formats. Overall, 11% recalled seeing some type of

advertisement (a slight decrease compared to 2023): 4% mentioned digital art pieces, 5% referred to podcasts or interviews, 3% cited promotional or sports activities by music, sports, or other brands, and 2% mentioned video games. 27% of respondents aged 18–29 recalled seeing such advertisements;



ATTITUDE TOWARDS ANTI-TOBACCO MEASURES

- During the interview, respondents were asked to share their attitude to the five proposed measures: tobacco point-of-sale display ban; increasing taxes on tobacco products and liquids for e-cigarettes; the prohibition of advertising brands of HTP devices and electronic cigarettes/vapes; the prohibition of flavored tobacco products; introduction of standardized packaging for tobacco products.
- No fewer than 50% of respondents support the five proposed measures to prevent tobacco consumption among youth. At the same time, 22.5% oppose these measures.
- The most widely supported measures are the prohibition of advertising brands of HTP devices and electronic cigarettes (70%) and ban on display of tobacco products at points of sale (68%). Slightly fewer respondents support the prohibition of flavored tobacco products (62%) and increasing taxes (56%). Standardized packaging garners approval from 50% of respondents.
- Talking about the age breakdown, these measures are supported by respondents aged 18-29 (compared to 30+ respondents).

Conclusions and recommendations

The conclusions and recommendations based on the survey results were prepared by experts from the NGO Advocacy Center “Life”.

Conclusions:

In Ukraine, there is a renewed trend toward reduced consumption of tobacco and nicotine products, which may indicate the effectiveness of Anti-Tobacco Law No. 1978, which came fully into force in 2023, as well as the policy of annual excise tax increases.

At the same time, the study demonstrates a trend toward increasing consumption of heated tobacco products (HTPs), particularly among the young population aged 18-29. The growth in the share of HTP users may be attributed to former cigarette smokers (whose numbers are decreasing) and new consumers who had not previously used tobacco products. The preferential position of HTPs in the tobacco market could also contribute to this growth: exemptions related to brand advertising, flavorings, and the absence of pictorial health warning on HTP packaging and devices.

The study highlights the importance of combined (text and graphic) health warnings on the packaging of combustible tobacco products – 94% of users notice such warnings, and 62% are motivated to take action to quit smoking. At the same time, it is observed that users of heated tobacco products and electronic cigarettes are significantly less likely to notice textual health warnings about the consequences of tobacco and nicotine use compared to cigarette users, whose packaging features combined health warnings.

The primary channel for advertising tobacco and nicotine products is visible placement in retail locations. The young demographic is most exposed to such advertising, with 62% of respondents aged 18-39 reporting exposure. This suggests that the tobacco industry is targeting young people as a key audience.

Support for strengthening anti-tobacco measures in Ukraine remains high, with two-thirds of respondents in favor.

Recommendations:

- Ensure a high level of enforcement of anti-tobacco legislation.
- Eliminate visible placement of tobacco and nicotine products in retail locations.
- Eliminate advertising privileges for HTPs and electronic cigarettes.
- Introduce regulations for nicotine pouches (nicotine snus) equivalent to those for tobacco products.

- Implement combined (text and graphic) health warnings on the packaging of tobacco and nicotine products and their devices, including information about the free tobacco cessation website “STOPSMOKING.ORG.UA”.
- Introduce standardized (plain) packaging for tobacco and nicotine products.
- Inform the public about the consequences of using tobacco and nicotine products.

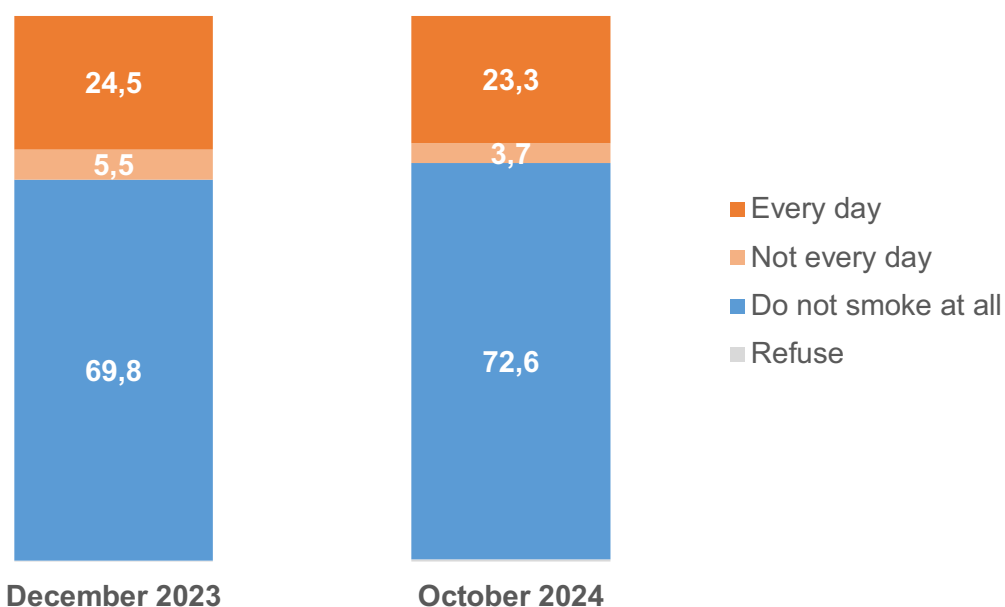


According to the survey results, a quarter of respondents – 27% – currently consume tobacco or nicotine products (daily or occasionally). Among them, 23% consume these products daily, while the remaining 4% – occasionally.

At the same time, **over the past year, the prevalence of tobacco or nicotine product consumption has slightly decreased – from 30% in December 2023 to 27% in October 2024**. Specifically, the share of occasional consumers has dropped from 5.5% to 4%. For daily consumers, the figure was 24.5% in 2023 and is now 23%. Formally, this difference is within the margin of statistical error, so any decrease can only be regarded as a trend.

Additionally, while the decline in the proportion of individuals consuming tobacco or nicotine products daily or occasionally may seem minor (a 3-percentage-point drop or a 10% decrease), in absolute terms, this represents approximately 700,000 people.

Graph I.1 Current consumption of tobacco or nicotine products



Question wording: As you know, some people smoke / consume tobacco or nicotine products, such as manufactured cigarettes, electrically heated tobacco products (such as IQOS, Glo, Ploom), electronic cigarettes, vapes, hookah, nicotine pouches (such as VELO or LYFT). Do you currently smoke / consume any tobacco or nicotine products every day, not every day, or don't smoke at all?

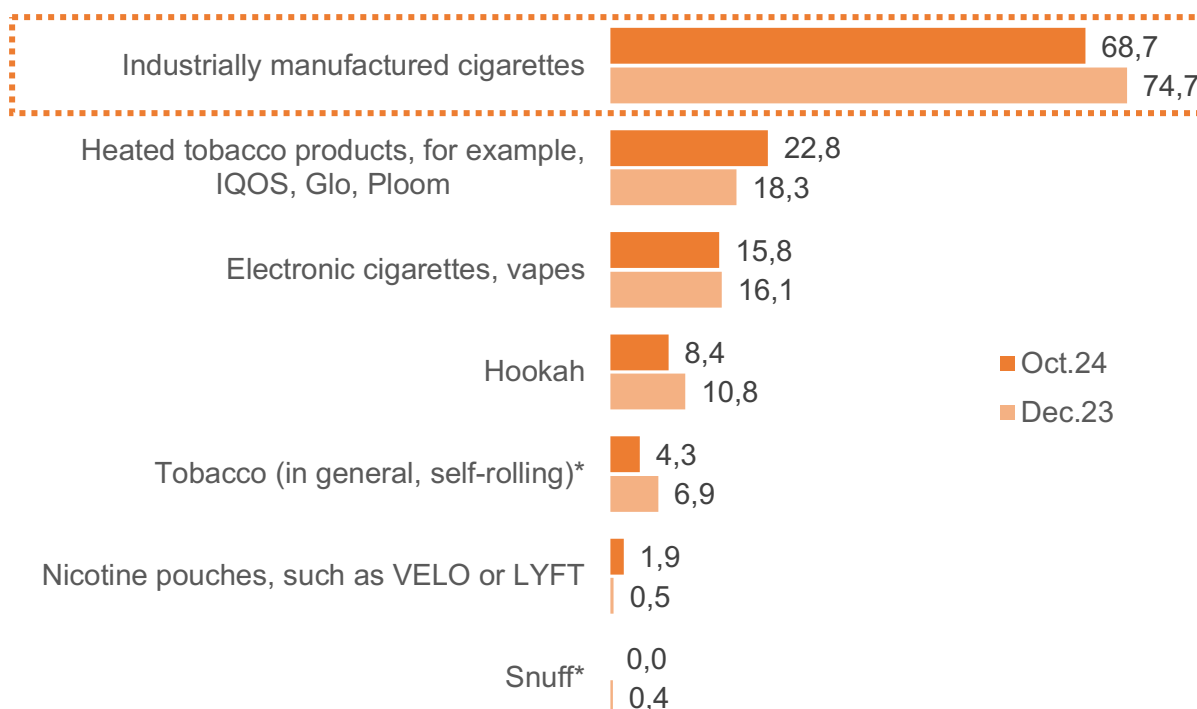
Among consumers of tobacco or nicotine products, the majority (69%) smoke industrially manufactured cigarettes, although this figure has decreased compared to 2023 (previously, 75% chose this option).

Next are HTPs (23%), electronic cigarettes (16%), hookahs (8%), and self-rolling tobacco (4%). The least mentioned were nicotine pouches (2%). For all these products (except industrially manufactured cigarettes), the current figures remain the same as in 2023, with differences falling within the margin of statistical error.

It can be assumed that the decline in smoking industrially manufactured cigarettes (and self-rolling tobacco) is “shifting” toward increased consumption of HTPs. However, this assumption requires further research to be validated.

Graph I.2 Which tobacco or nicotine products respondents currently consume

% among respondents who use tobacco products every day or not every day



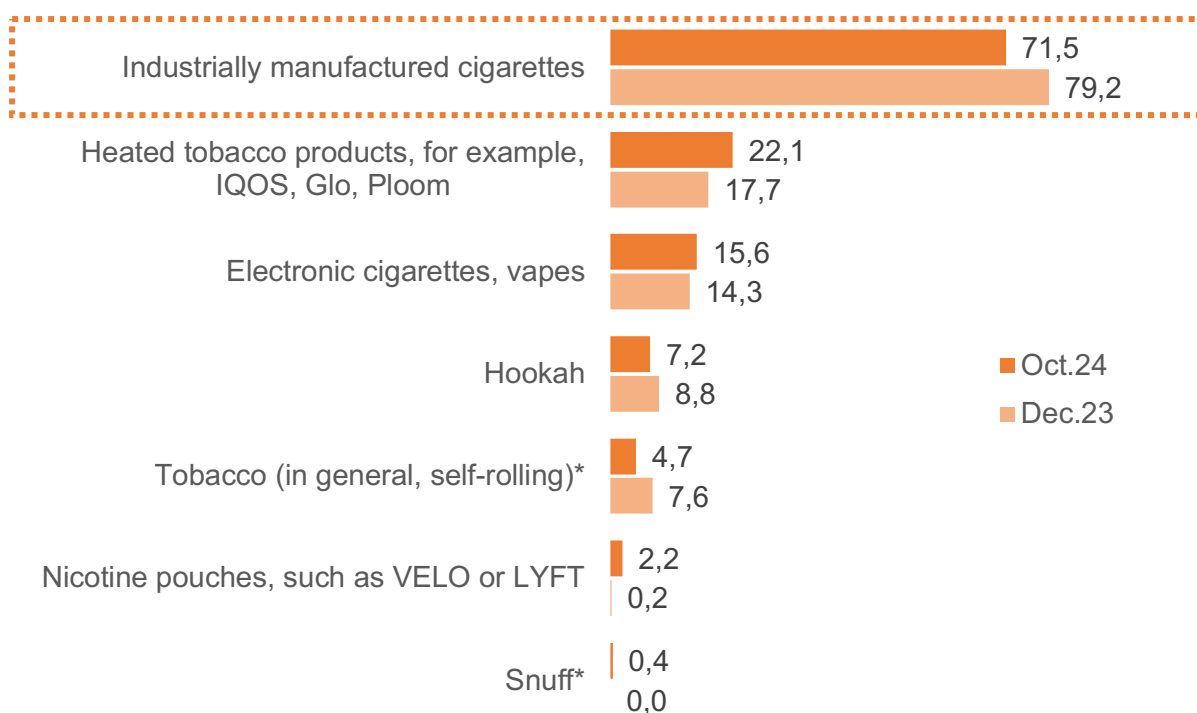
Question wording: What tobacco or nicotine products do you smoke / consume? (multiple answers possible)

** These options were not read but were coded from “other” answers. Perhaps if they were read out, more respondents would choose them.*

The graph below provides data specifically for respondents who consume tobacco or nicotine products *daily*. As can be seen, **among daily consumers, 71.5% smoke industrially manufactured cigarettes (a decrease from 79% in 2023)**. Next are HTPs (22%) and electronic cigarettes (16%). Notably, compared to 2023, there has been an increase in those reporting the consumption of nicotine pouches – from 0.2% in 2023 to 2% currently.

Graph I.3 Which tobacco or nicotine products daily tobacco consumers currently consume

% among respondents who use tobacco products every day

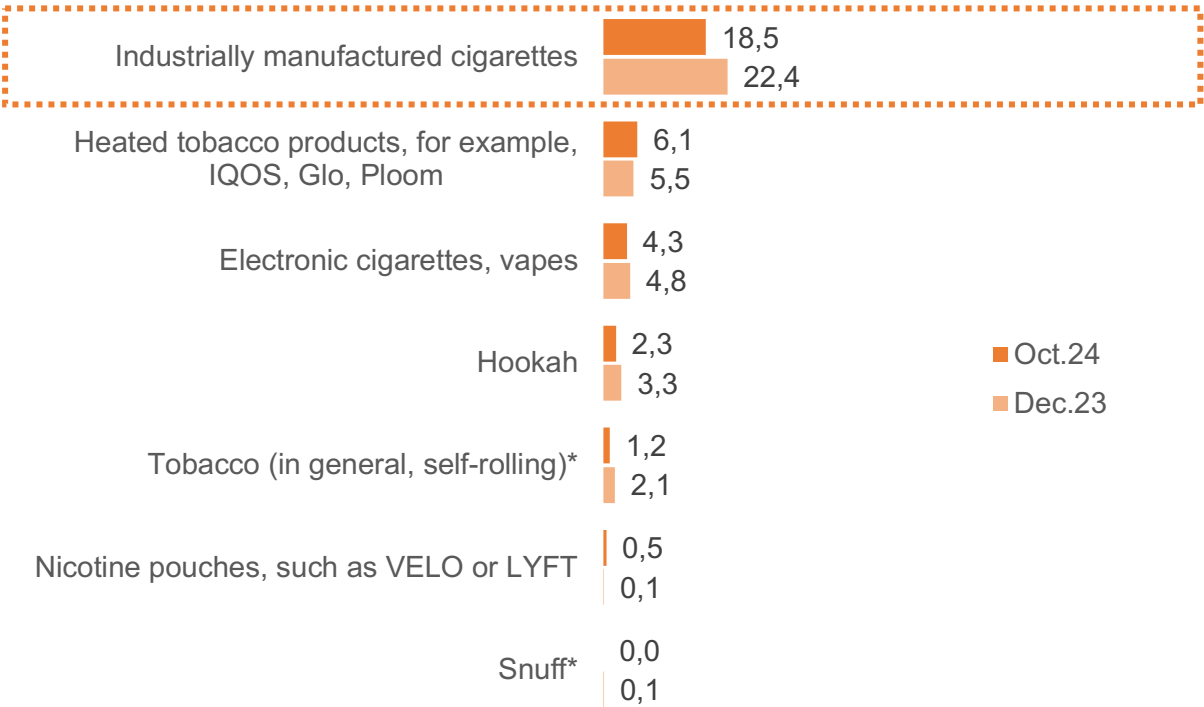


Question wording: What tobacco or nicotine products do you smoke / consume? (multiple answers possible)

** These options were not read but were coded from “other” answers. Perhaps if they were read out, more respondents would choose them.*

The graph below presents data adjusted for all respondents and represents the entire adult population of Ukraine on territories under the control of the Ukrainian government. As shown, 18.5% of all respondents smoke industrially manufactured cigarettes, 6% consume HTPs, and 4% – electronic cigarettes.

Graph I.4 Which tobacco or nicotine products respondents currently consume
 % among all respondents (regardless of the current tobacco or nicotine products usage or non-usage)



Question wording: What tobacco or nicotine products do you smoke / consume? (multiple answers possible)

* These options were not read but were coded from “other” answers. Perhaps if they were read out, more respondents would choose them.

The tables below present data broken down by specific socio-demographic categories. **The consumption of tobacco or nicotine products is significantly more prevalent among men than women. Among men, 39.5% consume such products, compared to 17% among women** (in 2023, the figures were 42.5% and 20%, respectively, but the difference from the current year falls within the margin of statistical error). Across all age groups, tobacco/nicotine consumption is higher among men. For instance, among men aged 18–29, the rate is 41%, compared to 24.5% for women; among respondents aged 30–39, it's 45% vs. 20%; for 40–49, 38% vs. 22%; for 50–59, 43% vs. 20%; for 60–69, 38% vs. 8%; and for 70+, 23% vs. 6%.

There is also a general trend showing higher tobacco or nicotine consumption among younger/middle-aged respondents (both men and women). Among those aged 18–59, 29.5–33% consume these products, compared to 20.5% among those aged 60–69 and 11% among those aged 70+. Compared to 2023, there is a statistically significant decline in

consumption among respondents aged 40–49, from 37% to 29.5% (for other age groups, the difference falls within the margin of error).

Additionally, residents of larger settlements reported consuming tobacco and nicotine products slightly more often. In rural areas, 23% of respondents consume such products, with the percentage increasing to 31% in cities with populations over 100,000. Compared to 2023, there has been a decline in consumption among residents of small towns/villages, from 35% to 25% (in other types of settlements, the differences are within the margin of error).

Table I.1 Current consumption of tobacco or nicotine products disaggregated by socio-demographic categories

% in row	December 2023			October 2024		
	Total	Every day	Not every day	Total	Every day	Not every day
Sex						
Male	42.5	36.2	6.2	39.5	34.9	4.6
Female	19.7	14.8	4.9	16.7	13.7	3.0
Age						
18-29	38.3	29.7	8.6	32.9	27.4	5.5
30-39	38.8	30.9	7.9	32.5	27.1	5.4
40-49	37.0	31.1	5.8	29.5	25.3	4.2
50-59	29.0	23.8	5.2	30.7	27.7	3.0
60-69	22.3	18.8	3.5	20.5	18.6	1.9
70+	7.8	7.4	0.4	11.1	9.9	1.2
Sex-age categories						
18-29 – males	39.6	30.8	8.8	40.8	34.9	5.9
18-29 – females	36.8	28.4	8.4	24.5	19.5	5.1
30-39 – males	49.7	43.3	6.5	44.7	38.4	6.3
30-39 – females	27.9	18.5	9.4	20.1	15.6	4.5
40-49 – males	48.3	42.3	6.0	37.9	31.9	6.0
40-49 – females	26.3	20.6	5.7	21.7	19.1	2.5
50-59 – males	46.3	39.0	7.3	43.4	40.6	2.8
50-59 – females	14.5	11.0	3.4	20.0	16.9	3.2
60-69 – males	40.3	34.9	5.4	37.8	34.6	3.2
60-69 – females	9.7	7.5	2.1	8.4	7.4	1.0
70+ – males	14.5	14.5	0.0	22.7	22.7	0.0
70+ – females	4.9	4.4	0.6	6.1	4.4	1.7
Region						
West	24.7	20.1	4.6	21.5	17.1	4.4
Center	27.5	22.3	5.2	26.6	23.2	3.4
South	38.3	31.7	6.6	32.0	28.1	3.9
East	34.2	27.5	6.7	32.3	30.4	1.9
Settlement type						

% in row	December 2023			October 2024		
	Total	Every day	Not every day	Total	Every day	Not every day
Village	25.7	22.4	3.3	22.7	19.0	3.7
UTV / town up to 20K	34.9	29.8	5.1	24.6	21.2	3.4
Town 20-99K	26.1	18.5	7.6	27.6	26.2	1.4
City 100K and more	32.7	26.1	6.7	30.6	26.2	4.4
Family welfare						
Very low	35.8	32.3	3.6	27.4	22.7	4.7
Low	31.6	27.5	4.1	24.0	20.3	3.7
Average	28.7	21.7	7.0	26.4	24.0	2.4
High	28.8	22.9	5.9	33.0	26.8	6.2

There are also notable differences in the specific products consumed by various socio-demographic categories. Men are slightly more likely to consume industrially manufactured cigarettes (73% of male consumers vs. 60.5% of female consumers). However, women are more likely to consume heated tobacco products (34% vs. 17% among men) and electronic cigarettes (20% vs. 13%).

Cigarette smoking is somewhat less common among the youngest respondents (44% among those aged 18–29 and 60% among those aged 30–39, compared to 76–87% among older respondents). **In contrast, the consumption of heated tobacco products, electronic cigarettes, and hookahs is more prevalent among younger respondents.** Among those aged 18–29, 45% consume heated tobacco products, 44% consume electronic cigarettes, and 21% – hookahs.

There is also a trend indicating that smoking heated tobacco products is more common among residents of larger cities.

Compared to 2023, men, respondents aged 18–39, residents of cities with populations of 100,000 or more, residents of the South, and respondents with very low incomes report smoking industrially manufactured cigarettes less often. Meanwhile, residents of the Central region, rural areas, and respondents aged 50–59 reported less frequent consumption of self-rolling tobacco.

For HTP devices, statistically significant changes were observed only among respondents with average incomes, with more users in this category now than in 2023. Electronic cigarettes have become more popular in rural areas and less popular in cities with populations of 100,000 or more (changes in other settlements are within the margin of error).

**Table I.2 Which tobacco or nicotine products respondents currently consume
disaggregated by socio-demographic categories**

% in row	December 2023					October 2024				
	Cigarettes	HTPs	Electronic cigarettes	Hookah	Tobacco*	Cigarettes	HTPs	Electronic cigarettes	Hookah	Tobacco*
Sex										
Male	80.4	13.2	11.1	12.3	9.3	72.9	17.0	13.4	9.1	6.1
Female	64.4	27.4	25.1	8.3	2.7	60.5	34.2	20.4	7.1	0.7
Age										
18-29	60.8	37.0	36.1	25.0	0.8	43.7	44.6	44.2	21.2	0.6
30-39	73.4	25.0	16.5	14.2	2.1	59.6	34.6	21.7	12.3	0.7
40-49	81.5	10.4	13.9	6.1	5.3	76.1	14.4	6.0	4.7	8.1
50-59	80.6	6.7	5.2	3.3	13.7	84.3	9.5	3.2	1.7	3.3
60-69	76.9	5.8	2.2	0.6	20.3	82.9	5.7	0.0	0.0	11.4
70+	88.7	0.0	3.9	0.0	13.9	87.2	4.7	0.0	0.0	8.1
Region										
West	79.0	12.9	15.3	8.0	7.6	70.4	14.3	15.1	10.4	1.7
Center	72.0	17.8	17.0	12.0	12.3	72.7	22.1	15.1	8.7	2.5
South	73.9	22.3	14.7	11.2	1.0	62.9	29.7	20.8	8.7	4.0
East	76.2	19.6	19.2	12.3	5.9	66.8	24.8	6.1	2.6	16.4
Settlement type										
Village	72.6	11.0	2.1	8.5	16.9	79.0	10.5	15.2	5.4	4.5
UTV / town up to 20K	82.7	10.4	13.8	4.6	4.9	83.7	14.9	7.4	12.3	1.4
Town 20-99K	78.3	10.0	15.3	17.7	4.5	72.9	20.8	14.4	9.9	6.2
City 100K and more	72.3	26.8	25.1	12.7	2.4	58.9	31.6	18.0	8.9	4.3
Family welfare										
Very low	98.9	5.0	0.0	0.0	1.1	61.7	8.6	8.5	0.0	17.6
Low	75.2	15.6	11.3	4.3	11.5	81.0	15.0	9.3	3.0	5.6
Average	74.4	16.9	20.1	12.3	5.4	68.8	25.4	15.2	9.3	1.5
High	65.7	25.8	23.1	23.8	3.2	55.2	33.3	26.9	16.5	2.3

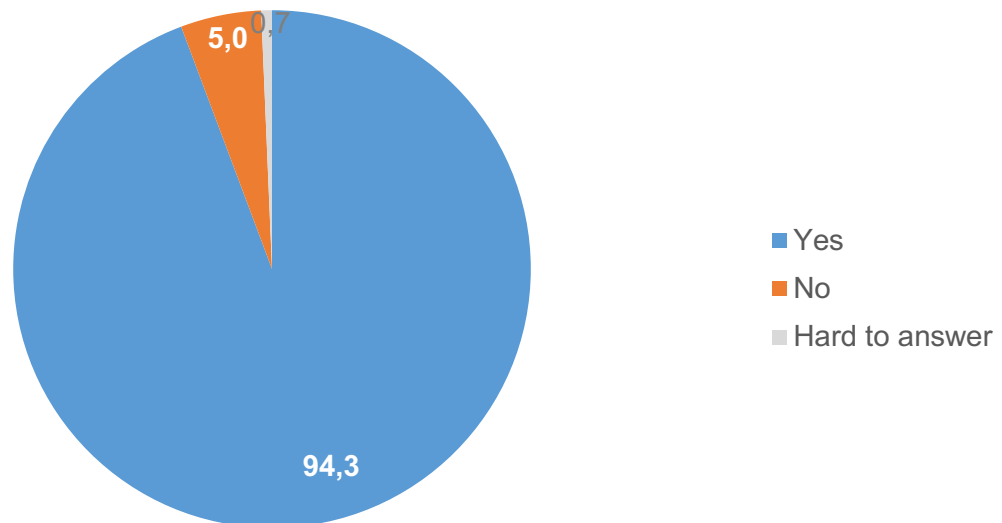


II.1 Cigarette smokers

Almost all cigarette smokers – 94% (94% among men and 95% among women) – noticed warnings about the harm of smoking on cigarette packs within the past month.

Graph II.1.1 In the past 30 days, have cigarette smokers noticed any medical warnings on cigarette packs

% among respondents who smoke industrially manufactured cigarettes every day or not every day



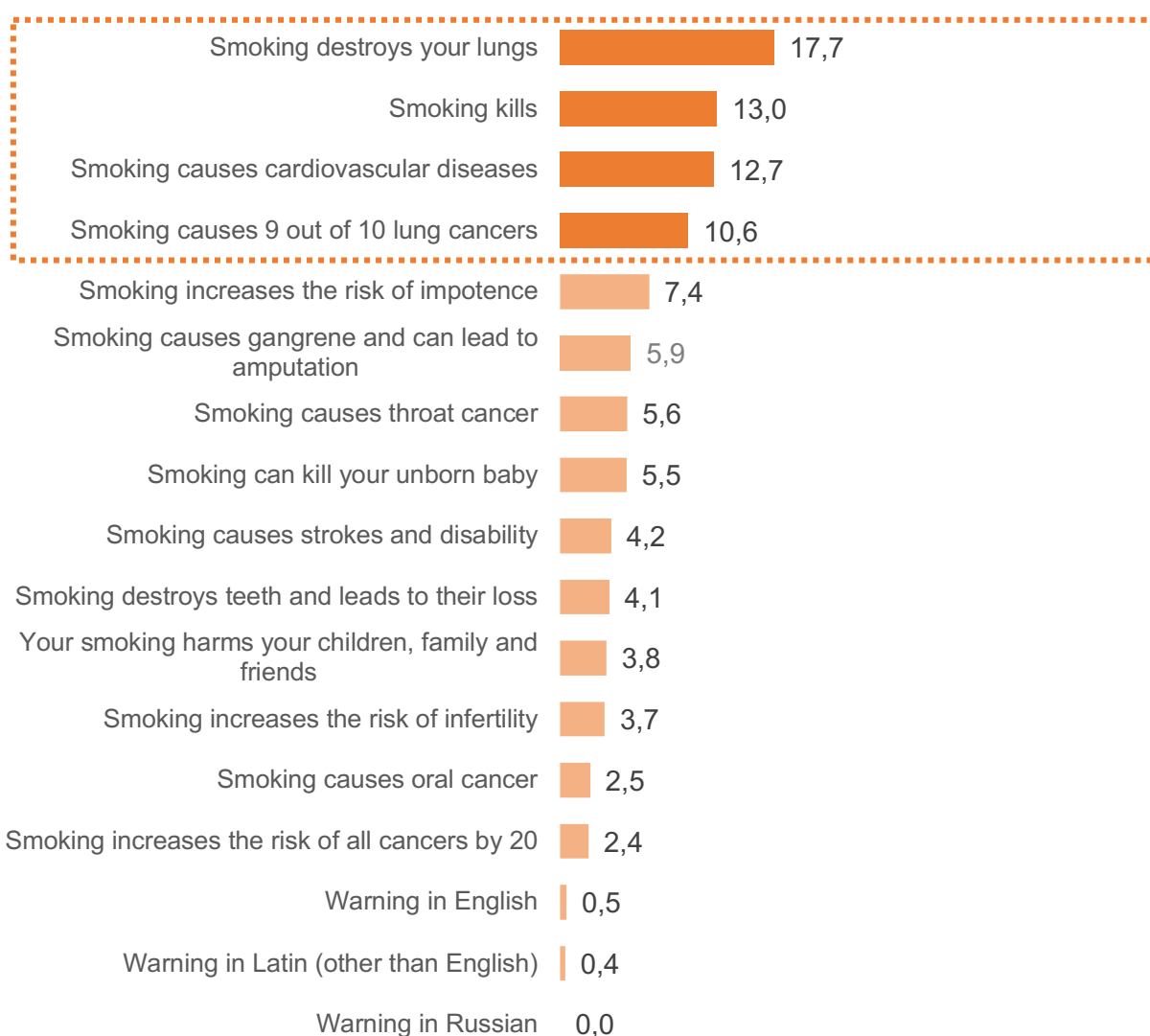
Question wording: During the last thirty days, have you noticed medical warnings about the dangers of smoking (words and/or pictures) on cigarette packs?

Among cigarette-smoking respondents, 6% did not have a cigarette pack with them during the interview. An additional 9% were unable to answer the question about the warning text on the pack.

When considering only smokers who had a pack with them and were able to respond (100%), the most commonly reported warning texts were: “Smoking destroys your lungs” (18%), “Smoking kills” (13%), “Smoking causes cardiovascular diseases” (13%), “Smoking causes 9 out of 10 cases of lung cancer” (11%). Additionally, only 1% of respondents mentioned warnings written in English or other Latin script, and none mentioned warnings in Russian.

Graph II.2.1 What is the medical warning on the pack that the respondents have with them

% among respondents who smoke industrially manufactured cigarettes every day or not every day and who have a pack with them and answered a question



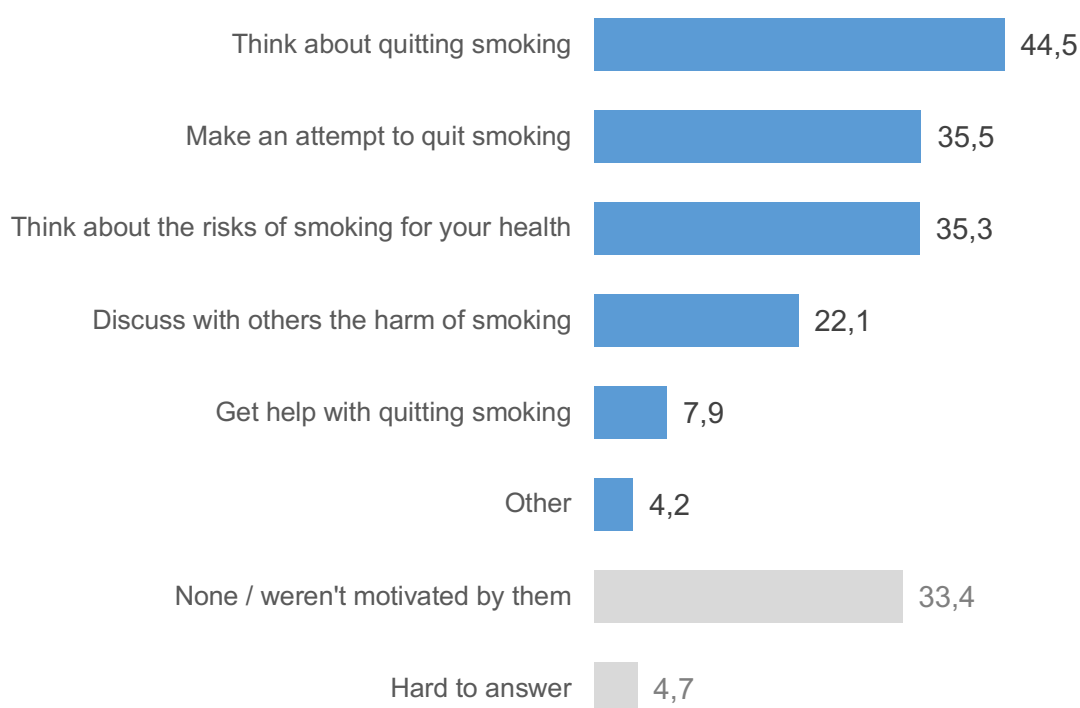
Question wording: What's the medical warning on your cigarette pack now?

The majority of cigarette-smoking respondents – 62% – claim that medical warnings on cigarette packs over the past two months motivated them to take certain actions (64% among men, 58% among women). The most common response was that they thought about quitting smoking (44.5% of cigarette-smoking respondents). Additionally, 35% considered the health risks associated with smoking.

Furthermore, one in three respondents (35.5%) attempted to quit smoking (38% among men, 30.5% among women).

Graph II.3.1 During the last two months to what actions were motivated by the medical warnings

% among respondents who smoke industrially manufactured cigarettes every day or not every day



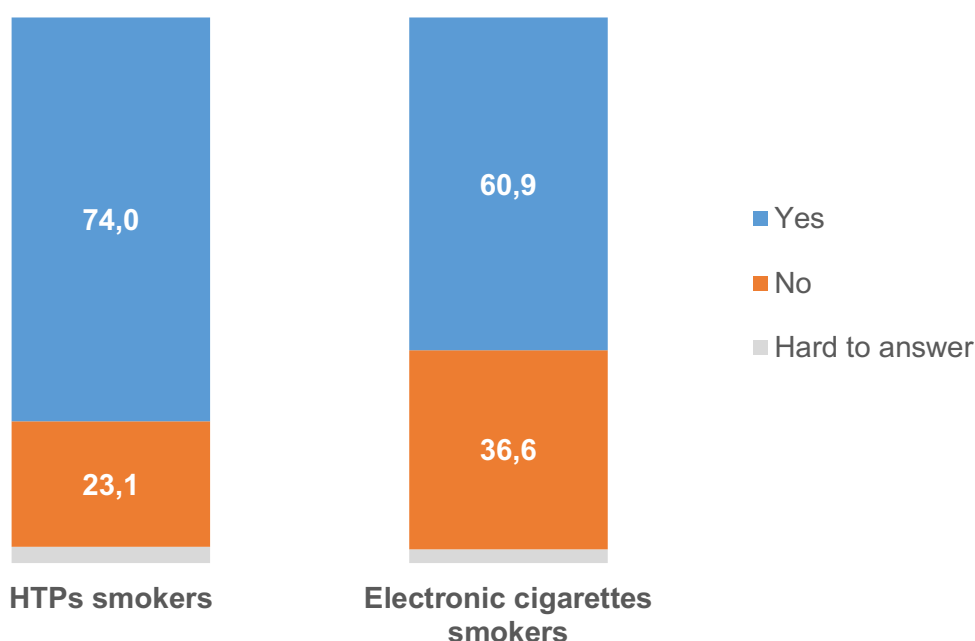
Question wording: During the last two months to what actions were you motivated by the medical warnings about the harm of smoking (words and/or images) on cigarette packs? (multiple answers possible)

II.2 Smokers of HTPs and electronic cigarettes

Consumers of HTPs and electronic cigarettes are significantly less likely to notice medical warnings about the dangers of smoking. Among HTP smokers, 74% noticed such warnings (79% of men and 69% of women), while among electronic cigarette smokers, the figure is 61% (64.5% of men and 56% of women).

Graph II.2.1 Have HTP and e-cigarette smokers noticed medical warnings in the past 30 days

% among respondents who use the respective products daily or not daily



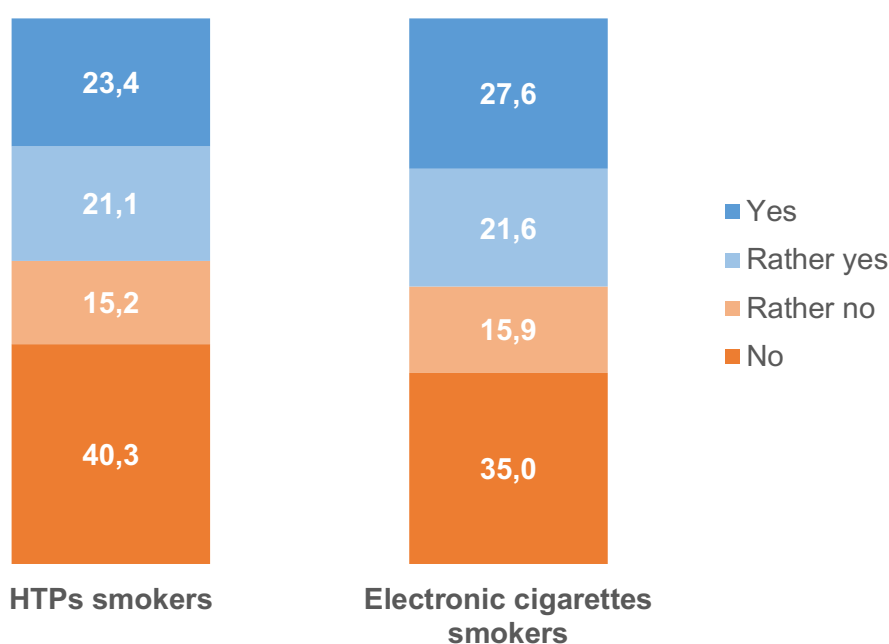
Question wording: In the past thirty days, have you noticed medical warnings about the health hazards on packs of HTPs (used with IQOS, Glo, Ploom devices)? / In the past thirty days, have you noticed medical warnings about the health hazards of using e-cigarettes on e-cigarette packages?

Among HTP consumers, 44.5% claim that medical warnings make them consider quitting smoking. However, only 23% responded “yes”, while the rest answered “rather yes”. Among male HTP users, 53% considered quitting due to medical warnings, compared to 36% of female users.

A similar situation is observed among electronic cigarette users. Among them, 49% considered quitting smoking, but only 28% responded “yes” (the rest answered “rather yes”). For men, this figure is 55%, while for women, it is 41%.

Graph II.2.2 Have the medical warnings prompted you to think about quitting usage of the corresponding products

% among respondents who use the respective products daily or not daily



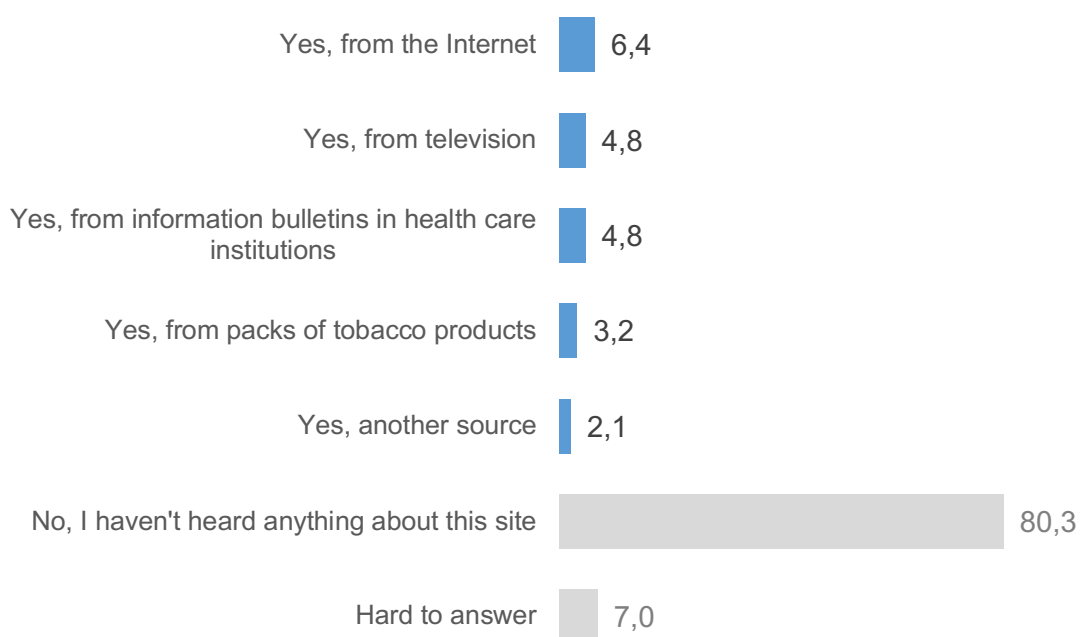
Question wording: Do medical warnings prompt you to think about giving up the use of HTPs? / Do medical warnings prompt you to think about giving up e-cigarettes?



A total of 13% of respondents are aware of the “stopsmoking.org.ua” website. The most common source of information about the site is the Internet, followed by channels such as television and informational bulletins in healthcare facilities. Only 3% learned about it from tobacco product packaging.

Among those who currently consume tobacco or nicotine products (daily or occasionally), 17% are aware of the site. Among those who do not consume such products, 11% are aware of it.

Graph III.1 Knowledge about a free website to quit using tobacco and nicotine «stopsmoking.org.ua»



Question wording: Have you heard about the free website for quitting tobacco and nicotine use, stopsmoking.org.ua? If yes, where did you find out about this resource? (multiple answers possible)

The table below presents data broken down by specific socio-demographic categories. Depending on the category, awareness of the website ranges from 8% to 16%.

Table III.1 Knowledge about a free website to quit using tobacco and nicotine «stopsmoking.org.ua» disaggregated by socio-demographic categories

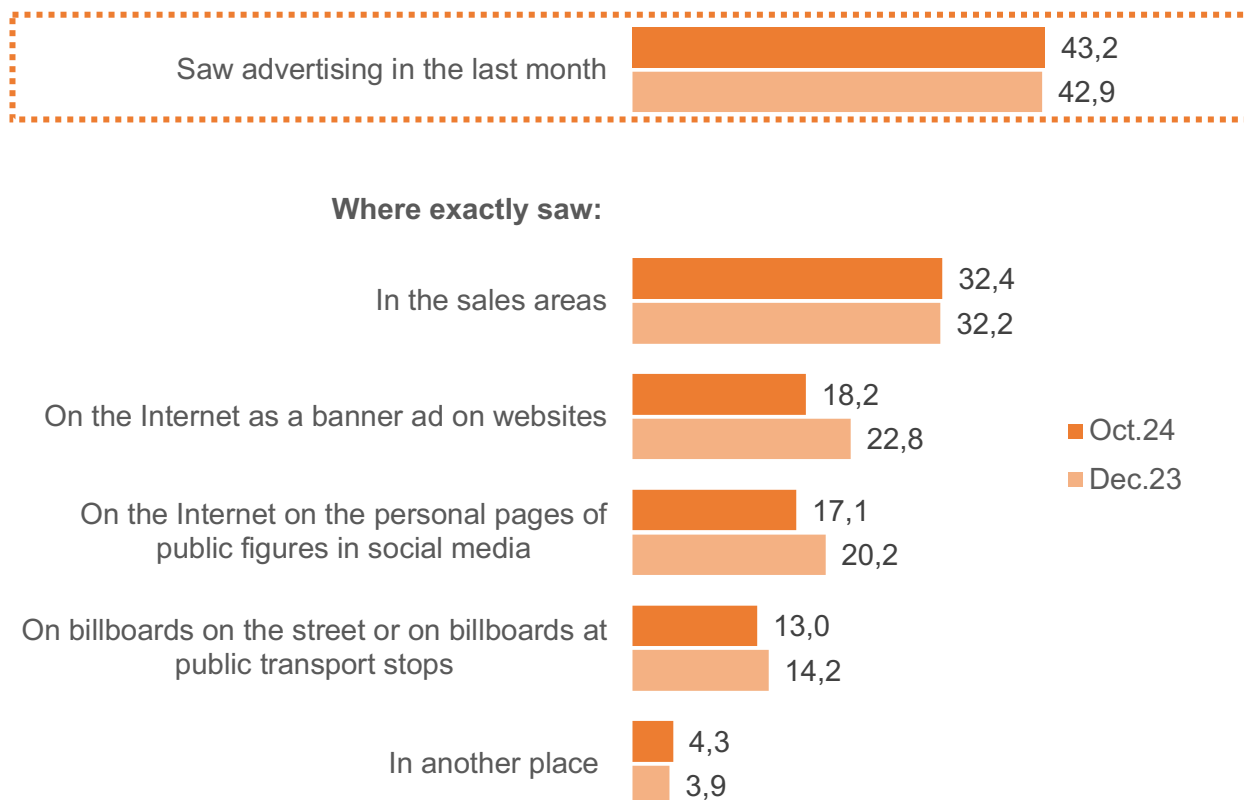
<i>% in row</i>	Internet	TV	Health care	Packs of cigarettes	Other source	Haven't heard	Hard to answer
Sex							
Male	7.7	4.4	4.4	3.1	2.2	82.3	4.8
Female	5.4	5.1	5.1	3.4	2.1	78.7	8.8
Age							
18-29	12.9	4.3	3.8	4.1	1.4	76.3	8.6
30-39	5.3	2.1	2.9	1.8	1.2	87.6	3.8
40-49	5.2	2.8	3.9	2.2	2.0	83.9	6.4
50-59	5.9	7.5	9.1	6.6	2.3	78.3	5.3
60-69	5.2	4.5	4.5	3.1	2.2	77.5	8.9
70+	4.2	9.0	5.0	1.7	4.2	74.8	10.4
Region							
West	7.5	5.3	6.1	5.0	2.2	81.2	4.0
Center	5.3	4.1	4.2	2.3	1.2	79.8	9.0
South	6.5	5.3	4.7	2.6	2.7	80.7	7.3
East	7.8	4.7	3.5	2.9	4.0	78.5	7.3
Settlement type							
Village	7.8	6.1	5.7	3.9	2.1	79.4	5.9
UTV / town up to 20K	8.8	7.6	7.1	4.8	1.6	75.5	8.7
Town 20-99K	6.5	6.1	4.2	4.1	3.2	81.9	4.6
City 100K and more	4.9	2.8	3.7	2.1	2.0	81.6	8.1
Family welfare							
Very low	4.9	4.2	2.8	6.4	0.8	72.7	13.9
Low	5.8	6.8	6.6	3.2	3.2	78.2	6.2
Average	7.9	4.8	4.7	3.4	2.1	80.1	7.0
High	5.6	2.5	2.7	1.9	1.3	87.2	4.6



IV.1 Saw advertising of tobacco or nicotine products in the last month

Two out of every five respondents (43%) have seen advertisements for tobacco or nicotine products somewhere in the past month (the same percentage as in 2023). The most common location for seeing such advertisements was sales areas, noted by 32% of all respondents (the same as in 2023). Next was banner advertising on the Internet (18%, a slight decrease from 23% in 2023) and on personal pages in social media (17%, decrease from 20% in 2023). Advertisements seen outdoors were reported by 13% of respondents (similar to 14% in 2023).

Graph IV.1.1 Saw advertising of tobacco or nicotine products in the last month (regardless of the product type)



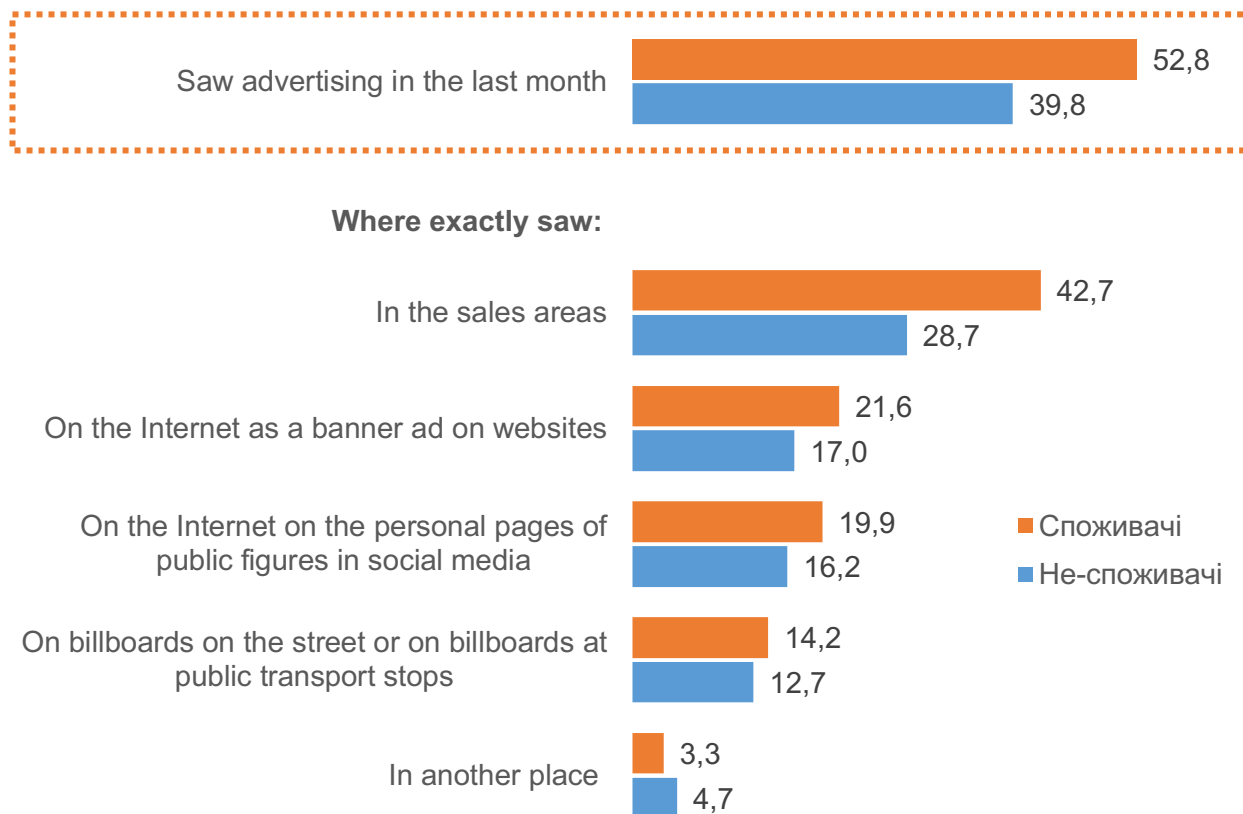
The table below provides a breakdown of experiences by specific types of tobacco or nicotine products. The most commonly seen advertisements were for tobacco products, such as regular cigarettes or heated cigarettes (35% of all respondents, the same as in 2023) or HTP devices (28%, decrease from 31% in 2023). Advertisements for electronic cigarettes were seen by 24% (the same as in 2023), while ads for nicotine pouches were noticed by 14% (increase from 10% in 2023).

**Table IV.1.1 Saw advertising of tobacco or nicotine products in the last month
(details for individual products)**

% in column <i>Question wording: During the past month, have you noticed any advertisements or announcements promoting the sale of...?</i>	Tobacco products (such as cigarettes or e-cigarettes)		HTPs		Electronic cigarettes		Nicotine pouches	
	Dec.23	Oct.24	Dec.23	Oct.24	Dec.23	Oct.24	Dec.23	Oct.24
Saw advertising in the last month:	35.0	34.9	31.0	27.8	23.9	24.4	9.8	13.6
<i>In the sales areas</i>	23.6	25.5	21.4	20.3	15.9	16.1	6.5	10.2
<i>On the Internet as a banner ad on websites</i>	17.3	13.8	15.8	11.2	12.7	9.7	5.3	4.4
<i>On the Internet on the personal pages of public figures in social media</i>	15.4	11.8	13.0	10.6	11.0	9.5	4.6	4.3
<i>On billboards on the street or on billboards at public transport stops</i>	9.6	9.3	7.9	7.0	5.8	5.7	2.3	2.7
<i>In another place</i>	2.2	2.4	1.2	1.3	1.0	0.7	0.4	0.9
Haven't seen	61.9	58.1	65.8	64.8	72.9	67.7	86.4	78.0
Hard to say	3.1	6.9	3.2	7.5	3.3	7.9	3.9	8.4

Advertisements for tobacco or nicotine products were slightly more often seen by current consumers (daily or occasional) – 53% compared to 40% among non-consumers. Primarily, consumers reported seeing such advertisements more frequently in sales areas.

Graph IV.1.2 Saw advertising of tobacco or nicotine products in the last month (regardless of the product type) disaggregated by consumers and non-consumers



The table below presents data broken down by specific socio-demographic categories. Men were more likely to notice advertisements for any products (51% compared to 37% among women), as were younger respondents (the figure decreases from 61.5–63% among those aged 18–39 to 17.5% among those aged 70+). Wealthier respondents also noticed advertisements more often, with the percentage dropping from 58% among those with high incomes to 26% among those with the lowest incomes.

As for differences between men and women, it is worth noting that there is almost no difference between male and female smokers – 54% and 50%, respectively, reported seeing advertisements. However, there is a noticeable difference among non-smokers: 49% of non-smoking men noticed some type of advertisement, compared to 34% of non-smoking women.

Table IV.1.2 Saw advertising of tobacco or nicotine products in the last month (regardless of the product type) disaggregated by socio-demographic categories

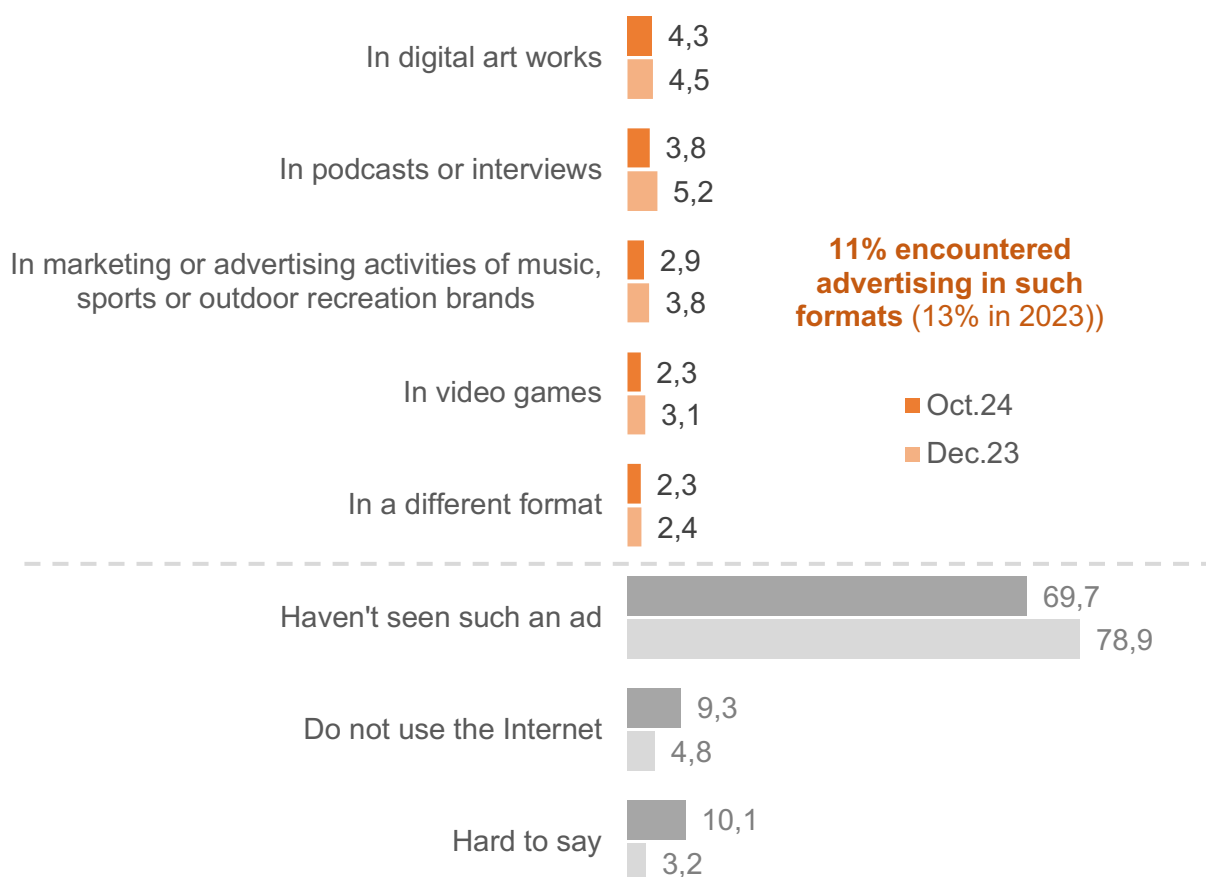
<i>% in row</i>	<i>% saw:</i>	<i>Sales areas</i>	<i>Banners on the Internet</i>	<i>Social media</i>	<i>Street</i>	<i>Other</i>
Sex						
Male	51.0	39.1	22.9	19.3	16.5	6.2
Female	36.8	26.9	14.2	15.3	10.1	2.7
Age						
18-29	61.5	50.3	33.4	35.6	24.5	5.8
30-39	62.9	49.3	25.7	25.0	15.5	7.6
40-49	45.9	36.9	20.1	17.0	15.1	3.9
50-59	33.2	20.2	10.7	11.7	6.2	2.3
60-69	28.4	18.1	10.1	5.2	8.1	1.9
70+	17.5	11.3	4.4	4.0	7.0	3.1
Region						
West	45.8	33.0	18.9	19.6	11.4	4.4
Center	43.7	33.7	18.2	17.3	14.4	3.8
South	41.0	32.3	16.2	14.4	13.6	3.7
East	38.8	25.7	20.7	16.1	11.5	6.9
Settlement type						
Village	37.2	25.1	14.7	17.4	11.0	2.8
UTV / town up to 20K	45.5	32.2	20.5	19.8	9.0	4.7
Town 20-99K	37.3	27.7	15.5	17.1	11.5	3.4
City 100K and more	48.9	39.4	21.0	16.3	16.0	5.5
Family welfare						
Very low	25.6	19.3	9.7	4.3	8.7	0.8
Low	33.1	23.5	13.4	14.5	10.7	4.0
Average	47.5	36.5	20.2	19.3	13.2	5.6
High	58.2	43.8	26.2	23.7	18.1	3.8

IV.2 Advertising of tobacco or nicotine products on the Internet in separate formats

Respondents were also asked whether they had seen advertisements for any tobacco or nicotine products online in specific formats. Overall, 11% recalled seeing some type of advertisement (a slight decrease compared to 2023): 4% mentioned digital art pieces, 5% referred to podcasts or interviews, 3% cited promotional or sports activities by music, sports, or other brands, and 2% mentioned video games.

The percentage was the same among consumers and non-consumers, with 11% in each group reporting having seen advertisements in one of these formats.

Graph IV.2.1 Saw advertising of tobacco or nicotine products in the last month (regardless of the product type) on the Internet in separate formats



Question wording: During the past month, have you noticed any advertising or announcement promoting the sale of any tobacco and nicotine products on the Internet in the following formats: (multiple answers possible)

The table below presents data broken down by specific socio-demographic categories. It is worth noting that 27% of respondents aged 18–29 recalled seeing such advertisements (the percentage decreases with age: 15% among those aged 30–39, 7% among those aged 40–49, and no more than 6% in older age groups).

Table IV.2.1 Saw advertising of tobacco or nicotine products in the last month (regardless of the product type) on the Internet in separate formats disaggregated by socio-demographic categories

<i>% in row</i>	Digital art	Podcasts or interviews	Music, sport, etc.	Video games	Other	Haven't seen	Do not use the Internet	Hard to say
Sex								
Male	5.2	4.1	3.4	3.5	2.7	71.1	8.2	8.0
Female	3.6	3.6	2.5	1.3	2.0	68.5	10.3	11.9
Age								
18-29	11.7	11.0	8.2	8.7	4.0	55.0	5.3	12.8
30-39	6.3	4.4	4.8	2.5	3.5	74.1	4.5	6.0
40-49	3.0	4.4	0.8	0.2	1.4	76.5	6.0	10.3
50-59	2.5	2.0	0.8	1.1	2.1	76.7	9.7	7.3
60-69	1.0	0.3	2.1	0.4	1.6	73.5	11.1	10.8
70+	0.5	0.2	0.0	0.6	1.0	58.6	23.4	15.6
Region								
West	5.3	4.7	2.9	2.8	2.1	67.7	12.9	7.2
Center	4.4	3.8	3.0	2.3	2.4	69.0	8.2	11.8
South	4.1	4.0	3.6	2.1	2.7	71.6	7.4	9.9
East	1.7	1.0	0.7	0.9	1.7	73.4	7.9	13.2
Settlement type								
Village	3.7	3.5	2.0	3.3	1.4	66.6	15.1	9.0
UTV / town up to 20K	5.5	5.6	3.6	2.1	4.0	71.2	5.8	9.1
Town 20-99K	4.3	3.4	3.4	1.7	1.9	70.2	10.9	7.7
City 100K and more	4.6	3.8	3.2	1.7	2.8	71.5	5.4	11.9
Family welfare								
Very low	2.2	2.2	0.6	0.5	0.6	51.8	17.4	27.6
Low	2.7	3.3	1.3	1.3	1.8	72.8	9.7	9.8
Average	5.2	2.9	3.7	2.2	2.5	70.4	9.4	8.5
High	6.7	7.3	5.0	4.9	3.8	71.2	4.7	6.0

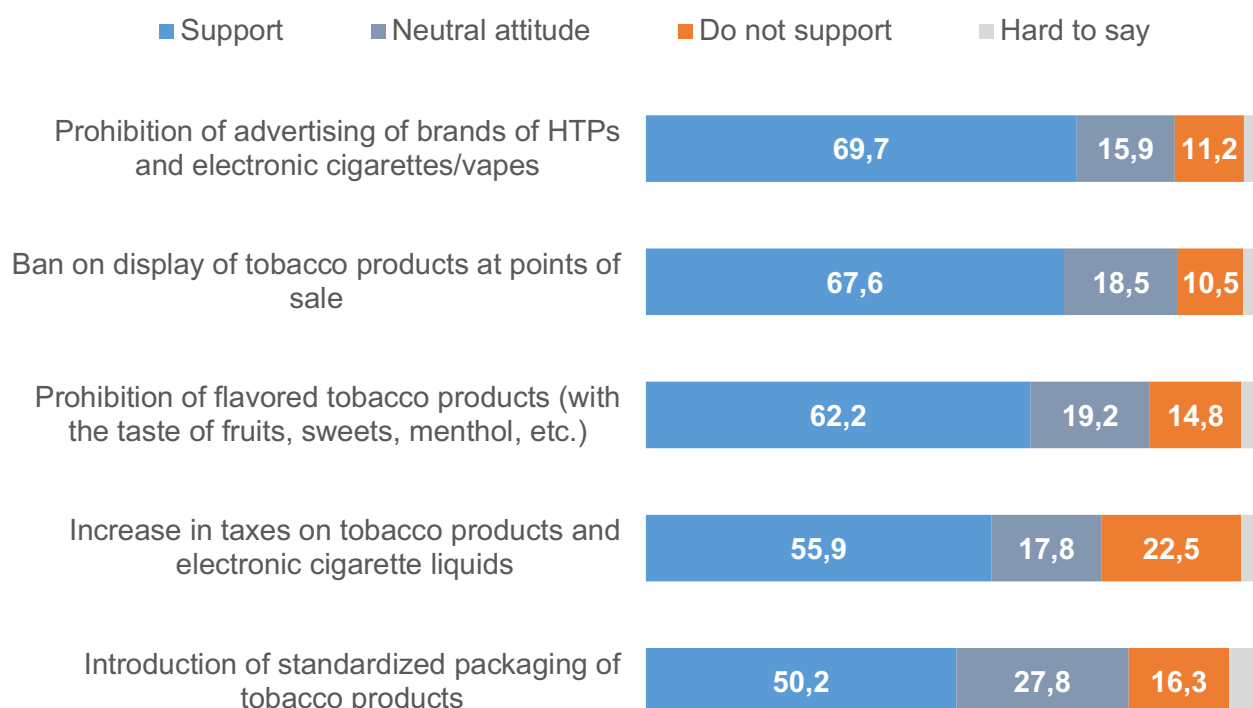
CHAPTER V. ATTITUDE TOWARDS ANTI-TOBACCO MEASURES



Support for the five proposed measures to prevent tobacco consumption among youth remains high (with no fewer than 50% in favor and no more than 22.5% opposed).

The most widely supported measures are the ban on advertising brands of HTP devices and electronic cigarettes (70%) and ban on display of tobacco products at points of sale (68%). Slightly fewer respondents support the prohibition of flavored tobacco products (62%) and increasing taxes (56%). Standardized packaging has the lowest level of support, but still garners approval from 50% of respondents.

Graph V.1 Attitude towards separate anti-tobacco measures



: Certain possible legislative changes are currently being discussed to protect young people and children from being involved in the initiation of smoking. Some support them, some do not for various reasons. Do you support or not support these changes?

The table below presents data broken down by specific socio-demographic categories. Across all categories, there is significant support for the proposed anti-tobacco measures.

Table V.1 Attitude towards separate anti-tobacco measures disaggregated by socio-demographic categories

% support the anti-tobacco measure

<i>% in row</i>	Prohibition of advertising brands of HTPs and electronic cigarettes	Ban on display of tobacco products at points of sale	Ban on flavored tobacco products	Increase in taxes on tobacco products and e-cigarette liquids	Introduction of standardized packaging of tobacco products
Sex					
Male	69.8	67.4	60.6	54.3	51.7
Female	69.5	67.8	63.6	57.2	49.0
Age					
18-29	57.6	56.6	45.7	41.5	41.7
30-39	70.5	68.2	61.4	55.8	49.7
40-49	74.3	72.2	67.8	58.9	53.9
50-59	72.6	68.9	65.3	56.5	51.2
60-69	73.2	74.1	71.5	60.2	54.8
70+	68.9	64.8	61.4	63.4	49.8
Region					
West	73.7	68.8	67.7	66.5	52.2
Center	69.7	69.5	63.4	57.2	52.1
South	64.5	64.6	53.6	45.6	46.4
East	70.2	64.5	63.5	44.4	46.3
Settlement type					
Village	66.8	64.2	62.3	58.6	48.6
UTV / town up to 20K	68.1	72.5	66.0	52.9	54.1
Town 20-99K	70.5	69.3	64.3	54.4	51.0
City 100K and more	72.0	68.6	60.7	54.9	50.3
Family welfare					
Very low	64.4	58.4	57.8	46.5	48.8
Low	70.4	69.7	66.8	56.6	49.5
Average	71.4	68.6	60.3	53.9	51.1
High	67.4	68.5	60.3	60.8	51.2

ANNEX A. SOCIO-DEMOGRAPHIC PROFILE OF RESPONDENTS OF THE SAMPLE AS A WHOLE AND OF INDIVIDUAL CATEGORIES



Table A1. Profile of all respondents, consumers and non-consumers of non-consumers of tobacco and nicotine products

<i>% in column</i>	Total sample	Consumers	Non-consumers
Number of respondents	2019	516	1495
Margin of error	2.4	4.7	2.8
Sex			
Male	45.3	66.3	37.5
Female	54.7	33.7	62.5
Age			
18-29	16.1	19.6	14.8
30-39	20.3	24.4	18.7
40-49	18.0	19.7	17.3
50-59	16.6	18.9	15.8
60-69	15.5	11.7	16.8
70+	13.5	5.6	16.5
Region			
West	29.2	23.3	31.5
Center	37.1	36.7	37.2
South	24.4	28.9	22.7
East	9.3	11.1	8.6
Settlement type			
Village	33.2	27.8	35.3
UTV / town up to 20K	10.4	9.4	10.6
Town 20-99K	12.7	13.0	12.6
City 100K and more	43.8	49.7	41.4
Family welfare			
Very low	7.9	8.1	7.9
Low	31.3	27.9	32.6
Average	38.2	37.3	38.6
High	20.3	24.9	18.6
Refuse	2.2	1.9	2.2

Table A2. Profile of respondents by sex and age

% in column	Male	Female	18-29	30-39	40-49	50-59	60-69	70+
Number of respondents	736	1283	382	441	339	303	337	217
Margin of error	4.0	3.0	5.5	5.1	5.9	6.2	5.9	7.3
Sex								
Male	---	---	51.4	50.6	48.6	45.7	41.1	30.3
Female	---	---	48.6	49.4	51.4	54.3	58.9	69.7
Age								
18-29	18.3	14.3	---	---	---	---	---	---
30-39	22.6	18.3	---	---	---	---	---	---
40-49	19.3	16.9	---	---	---	---	---	---
50-59	16.7	16.5	---	---	---	---	---	---
60-69	14.0	16.7	---	---	---	---	---	---
70+	9.0	17.3	---	---	---	---	---	---
Region								
West	30.1	28.4	32.3	31.7	29.9	27.8	26.5	25.5
Center	35.9	38.2	35.9	35.7	37.1	37.3	38.0	39.5
South	24.2	24.6	24.8	24.1	21.8	25.7	25.0	25.9
East	9.8	8.8	6.9	8.6	11.3	9.2	10.5	9.1
Settlement type								
Village	33.4	33.0	32.4	30.9	29.5	35.0	35.1	37.9
UTV / town up to 20K	10.1	10.6	8.6	11.2	13.2	10.2	8.6	9.5
Town 20-99K	12.6	12.8	10.9	12.0	12.5	15.1	15.5	10.3
City 100K and more	43.9	43.6	48.1	45.8	44.8	39.7	40.8	42.4
Family welfare								
Very low	5.4	10.1	2.9	1.4	5.6	8.0	17.5	15.8
Low	24.0	37.4	11.9	27.2	29.0	35.9	42.9	44.9
Average	38.4	38.1	49.7	46.2	39.0	33.8	27.9	29.0
High	29.0	13.2	34.5	22.4	24.5	20.2	10.0	6.7
Refuse	3.3	1.3	1.0	2.8	1.8	2.1	1.7	3.6

Table A3. Profile of respondents by region and type of settlement

% in column	West	Center	South	East	Village	UTV / up to 20K	Town 20-99K	City 100K
Number of respondents	488	846	493	192	464	238	305	1012
Margin of error	4.9	3.7	4.9	7.8	5.0	7.0	6.2	3.4
Sex								
Male	46.8	43.8	44.8	48.1	45.6	44.1	44.8	45.5
Female	53.2	56.2	55.2	51.9	54.4	55.9	55.2	54.5
Age								
18-29	17.8	15.6	16.4	12.0	15.7	13.4	13.8	17.7
30-39	22.0	19.5	20.0	18.8	18.9	21.9	19.2	21.2
40-49	18.4	18.0	16.1	21.9	16.0	22.9	17.7	18.5
50-59	15.8	16.7	17.5	16.5	17.5	16.4	19.7	15.1
60-69	14.1	15.8	15.8	17.6	16.4	12.9	18.8	14.4
70+	11.8	14.4	14.3	13.3	15.4	12.4	10.9	13.1
Region								
West	---	---	---	---	42.7	30.1	28.0	19.1
Center	---	---	---	---	36.2	33.5	44.3	36.6
South	---	---	---	---	16.3	22.7	17.2	33.1
East	---	---	---	---	4.8	13.8	10.5	11.2
Settlement type								
Village	48.5	32.3	22.2	17.2	---	---	---	---
UTV / town up to 20K	10.7	9.3	9.6	15.4	---	---	---	---
Town 20-99K	12.2	15.2	9.0	14.4	---	---	---	---
City 100K and more	28.6	43.2	59.3	53.1	---	---	---	---
Family welfare								
Very low	6.2	7.3	7.7	16.6	7.5	4.6	10.1	8.4
Low	29.2	29.6	34.2	37.4	30.7	37.8	34.1	29.5
Average	40.0	40.2	36.5	29.7	43.8	38.1	33.9	35.4
High	22.9	20.8	19.2	13.3	15.8	18.1	20.1	24.4
Refuse	1.8	2.1	2.5	2.9	2.2	1.4	1.8	2.4

Table A4. Profile of respondents by family wealth

% in column	Very low	Low	Average	High
Number of respondents	146	649	771	419
Margin of error	8.9	4.2	3.9	5.3
Sex				
Male	30.8	34.7	45.5	64.6
Female	69.2	65.3	54.5	35.4
Age				
18-29	5.8	6.1	20.9	27.4
30-39	3.6	17.6	24.5	22.3
40-49	12.8	16.7	18.4	21.7
50-59	16.7	19.0	14.7	16.5
60-69	34.1	21.2	11.3	7.6
70+	26.9	19.4	10.3	4.5
Region				
West	22.8	27.2	30.5	32.8
Center	34.3	35.1	39.0	38.1
South	23.6	26.7	23.3	23.1
East	19.4	11.1	7.2	6.1
Settlement type				
Village	31.4	32.5	37.9	25.7
UTV / town up to 20K	6.0	12.5	10.3	9.2
Town 20-99K	16.2	13.9	11.3	12.6
City 100K and more	46.4	41.1	40.5	52.5
Family welfare				
Very low	---	---	---	---
Low	---	---	---	---
Average	---	---	---	---
High	---	---	---	---
Refuse	---	---	---	---