

# **Understanding the Consumption of Combustible and Non-Combustible Nicotine Products in Turkiye**

## **Recent Findings**

by

**The Economic Policy Research Foundation of Turkey (TEPAV)**

and

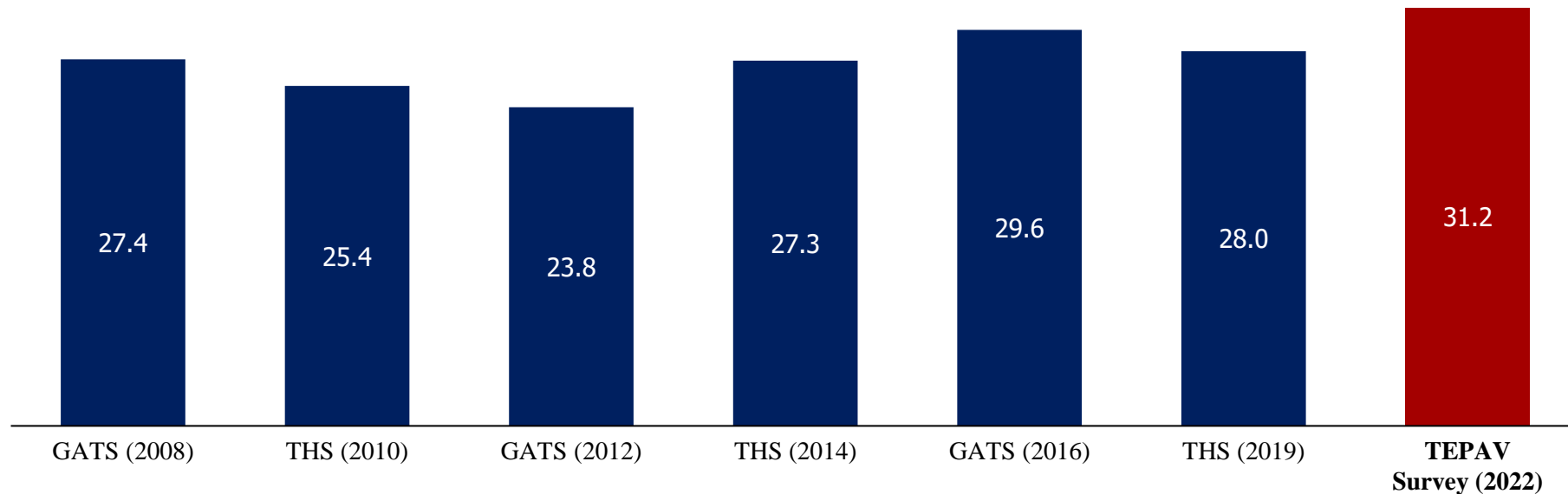
**Economic Research Agenda Association (ERAA)**

## TEPAV's Quarterly Surveys in 2022

- In 2022, TEPAV conducted 4 quarterly surveys.
- Conducted via a computer-assisted telephone survey with **2000 participants** in **12 provinces** (Istanbul, Balıkesir, Izmir, Bursa, Ankara, Antalya, Kayseri, Samsun, Trabzon, Erzurum, Malatya, Gaziantep) representing the 12 NUTS-1 regions of Turkey.
- Tobacco use prevalence, addiction levels, age of onset, quitting tendencies, health perceptions in different demographic groups.
- The results shared in the following slides are for year 2022, aggregating the 4 surveys.

Smoking rates in Turkey fluctuated over the years, reaching in 2022 its highest rate in 15 years.

### The percentages of daily/regular smokers in Turkey by years, %

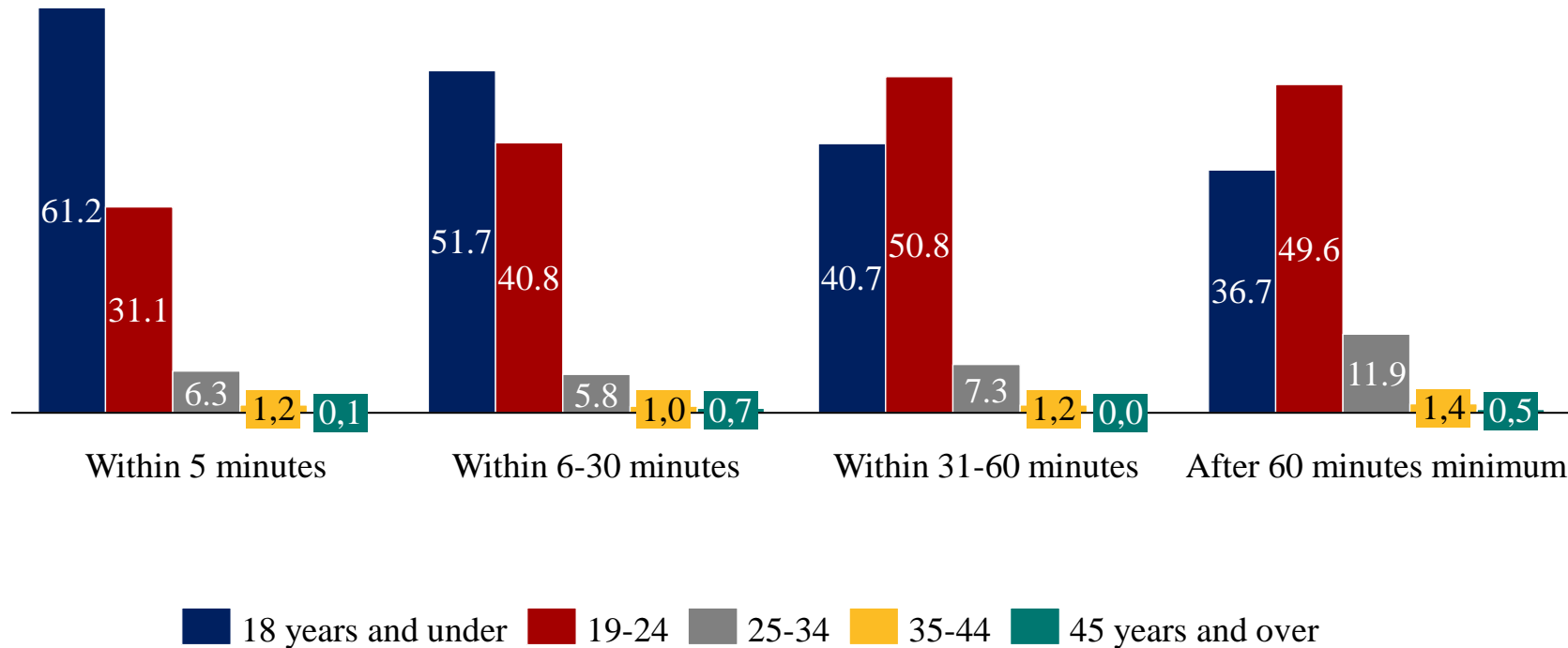


Source: CDC, TurkStat, WHO, TEPAV survey 2022, TEPAV compilations and calculations

**Note: After considering the advantages and disadvantages of existing data sources, it was decided to use GATS micro datasets for detailed analysis in this study.**

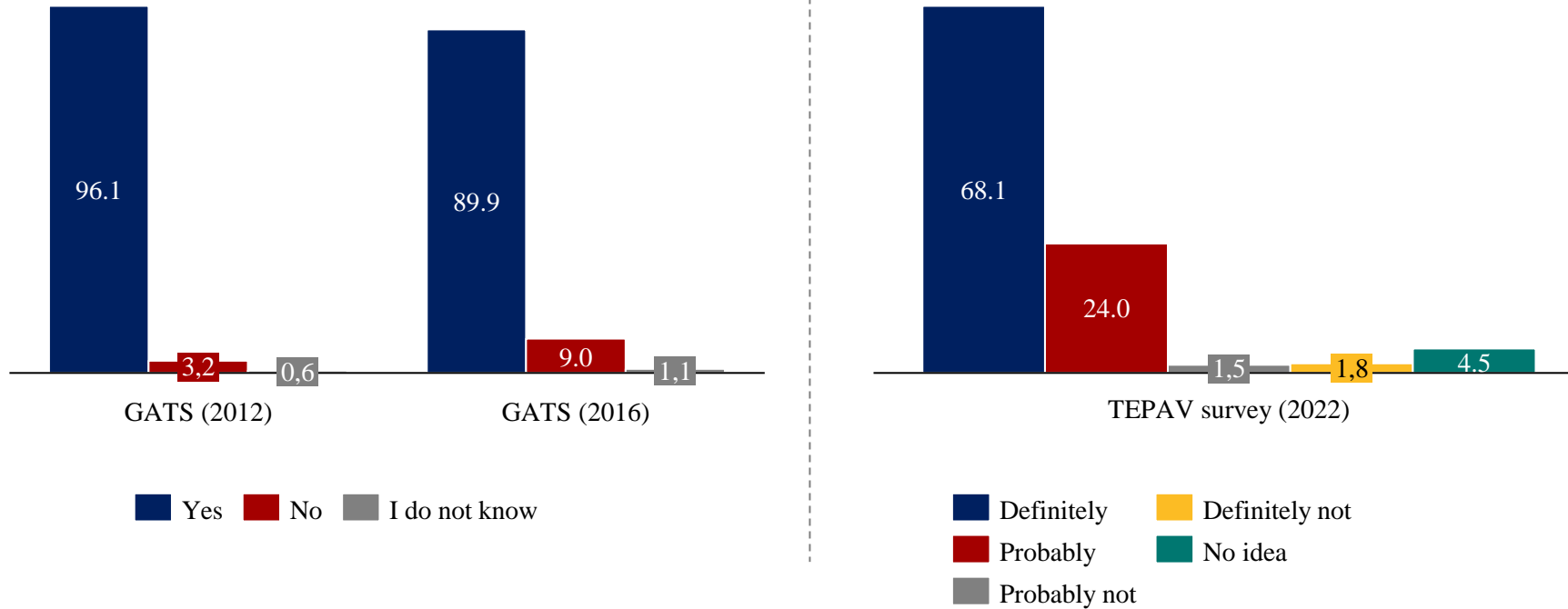
As the age of starting smoking decreases, the level of addiction increases (2022)

Time elapsed before smoking the first cigarette after waking up and the age of smoking initiation, 2022, %



In 2022, 68.1 percent of the population thought that smoking will definitely cause a serious illness; 24 percent thought it will probably cause a serious illness.

Responses to the question "Do you think smoking causes a serious illness?", 2012, 2016, 2022, %



## Policy environment in Turkiye:

**The import of tobacco harm reduction products (e-cigarettes, HTPs, their devices, parts, liquids etc.) was banned in Turkiye in February 2020\*...**



**There is a lack of comprehensive information on:**

- who the users are,
- the reasons for using them,
- the usage rates or patterns,
- the perception in the public regarding their harm reduction potential or effectiveness in reducing or quitting smoking.

## **TEPAV's Survey in 2023**

**Conducted an assessment on public awareness and perceptions regarding smoke-free nicotine-containing products in Turkey**

**(Comprehensive Report: Work-in-Progress)**

### **Aim of the project**

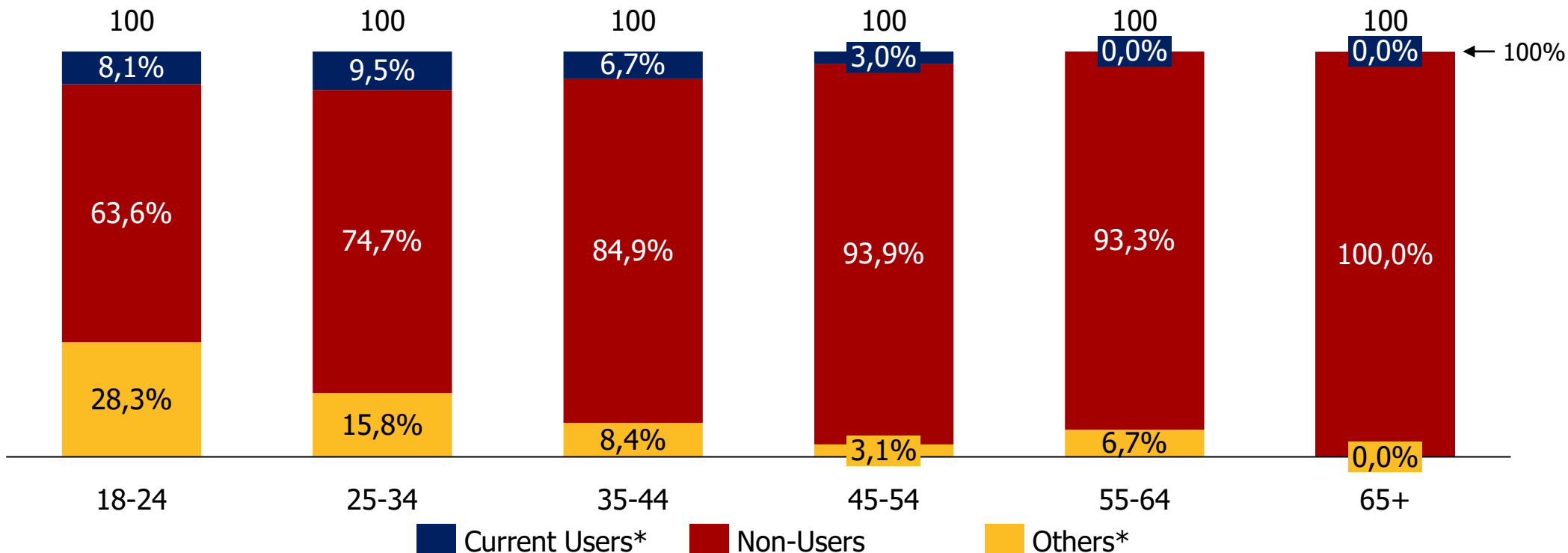
To fill the knowledge gap on the awareness, attitudes, beliefs, and behaviors of the adult population in Turkey regarding smoke-free products, specifically e-cigarettes and heat-not-burn products.

The questionnaire covers various aspects such as;

- Awareness,
- Perceptions of health risks,
- Usage rates and patterns,
- Reasons for use or non-use,
- Relation between risk perception and usage,
- Effectiveness in quitting smoking.

Asked to those who have seen/heard of e-cigs or HTPs

The age distribution of the responses given to the question 'Do you use e-cigarettes or heated tobacco products (such as IQOS)?' (2023)

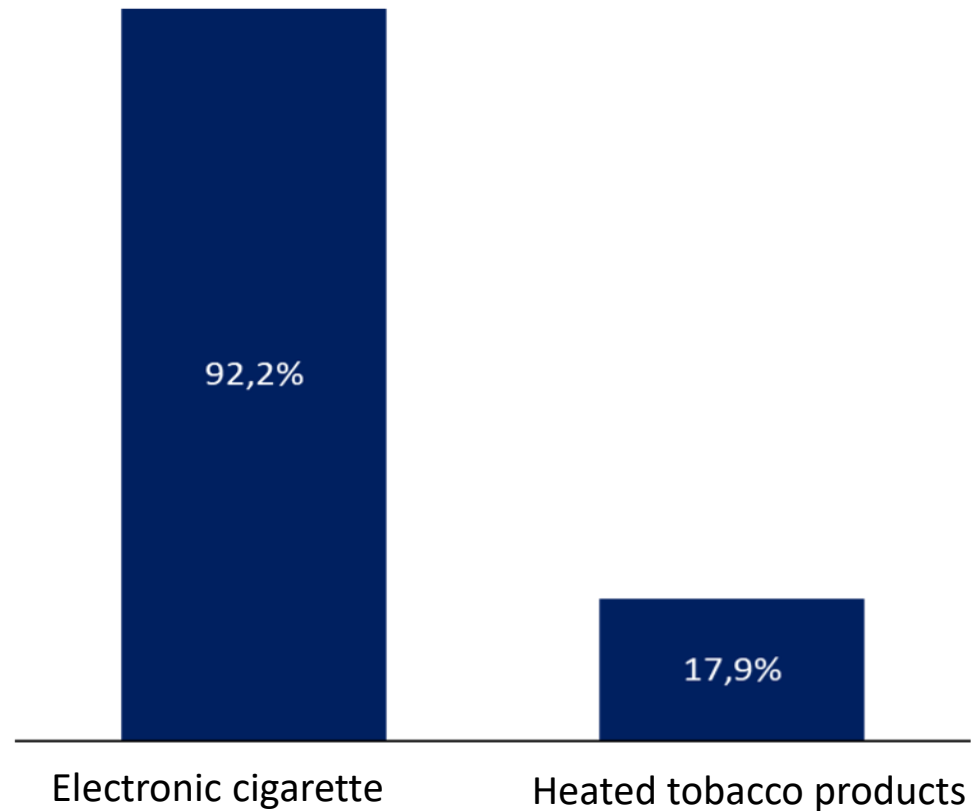


Others: Includes 'Yes, I tried/used occasionally but didn't continue,' and 'Yes, I used regularly in the past and quit.'  
 Current users: Includes 'Yes, I use regularly' and 'Yes, I use occasionally even if not regularly.'



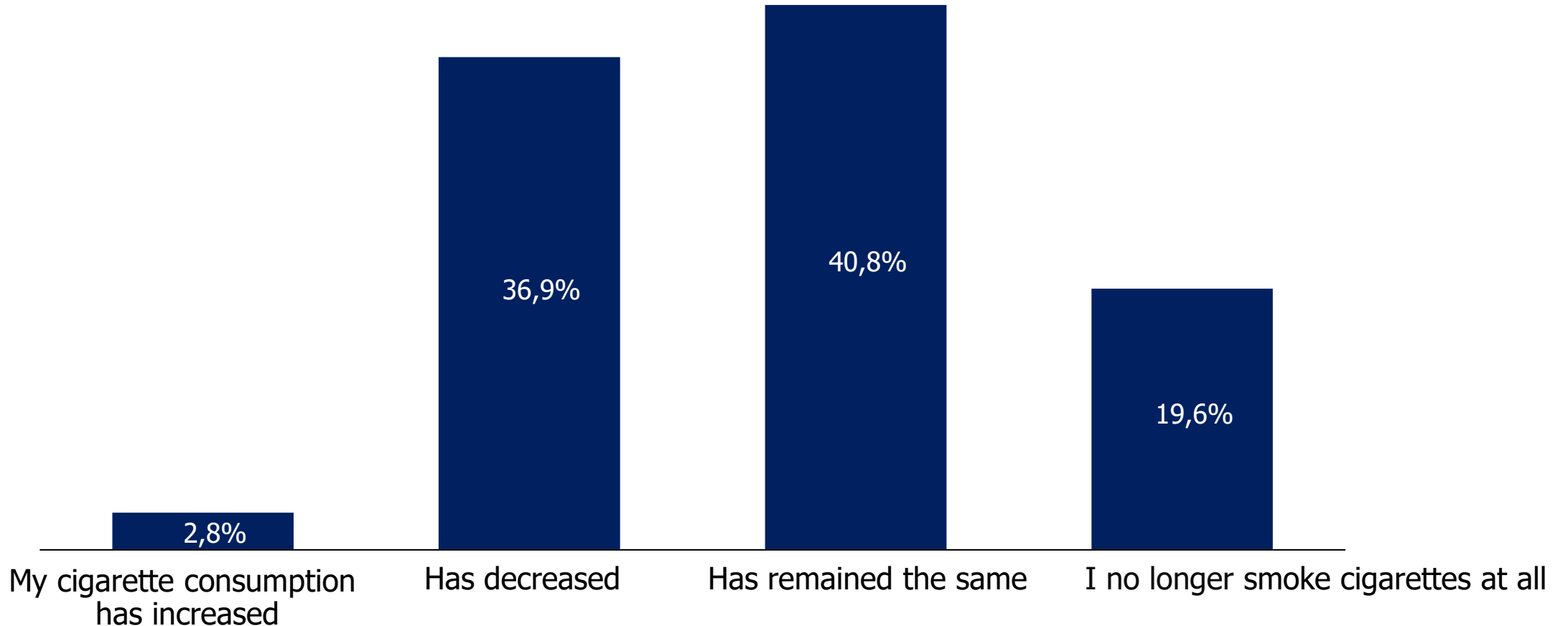
Asked to those who stated that they are current or past users of e-cigs or HTPs

'Do/Did you use electronic cigarettes or heated tobacco products (such as IQOS)? Which one(s)?' %  
(2023)



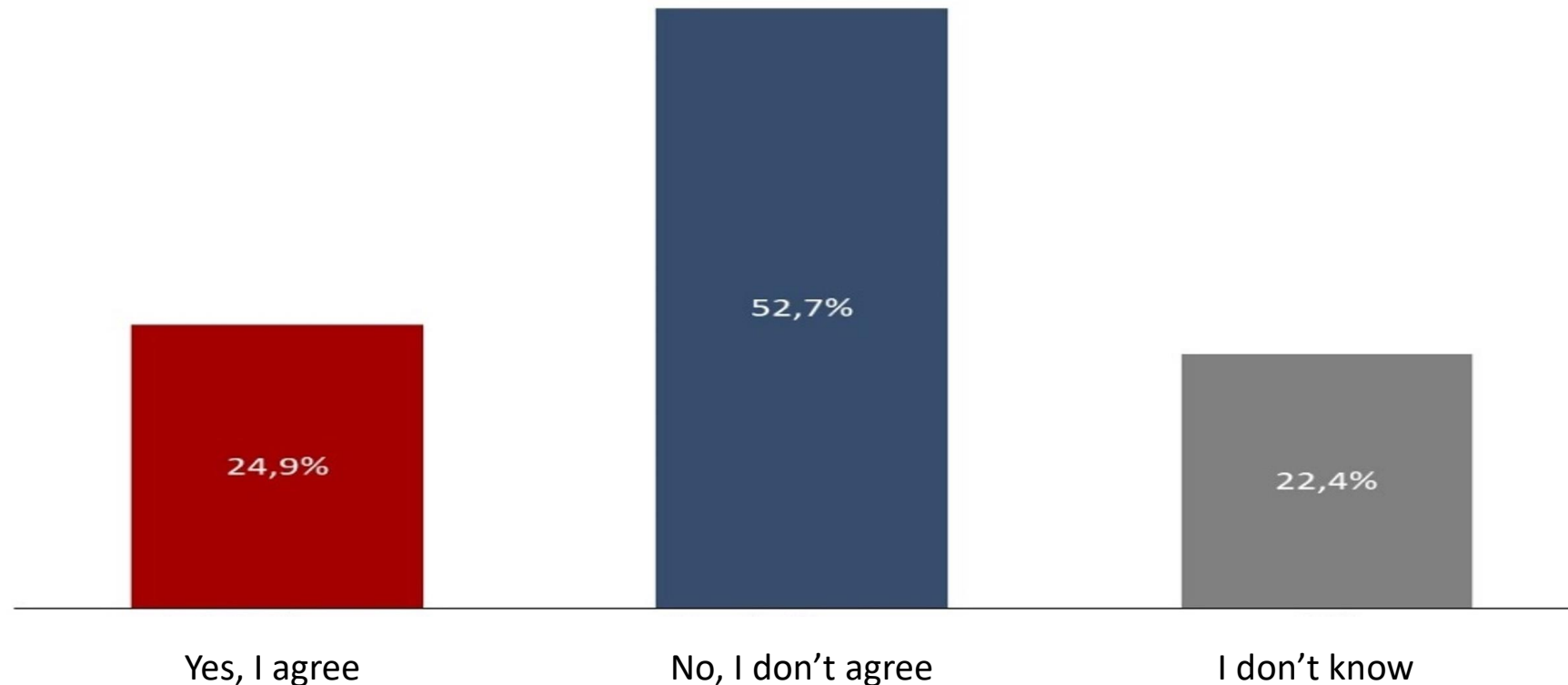
(Among participants who stated that they have used cigarette-like products at least once, % )

The distribution of responses to the question  
'Has using electronic cigarettes/heated tobacco products affected your cigarette consumption?'



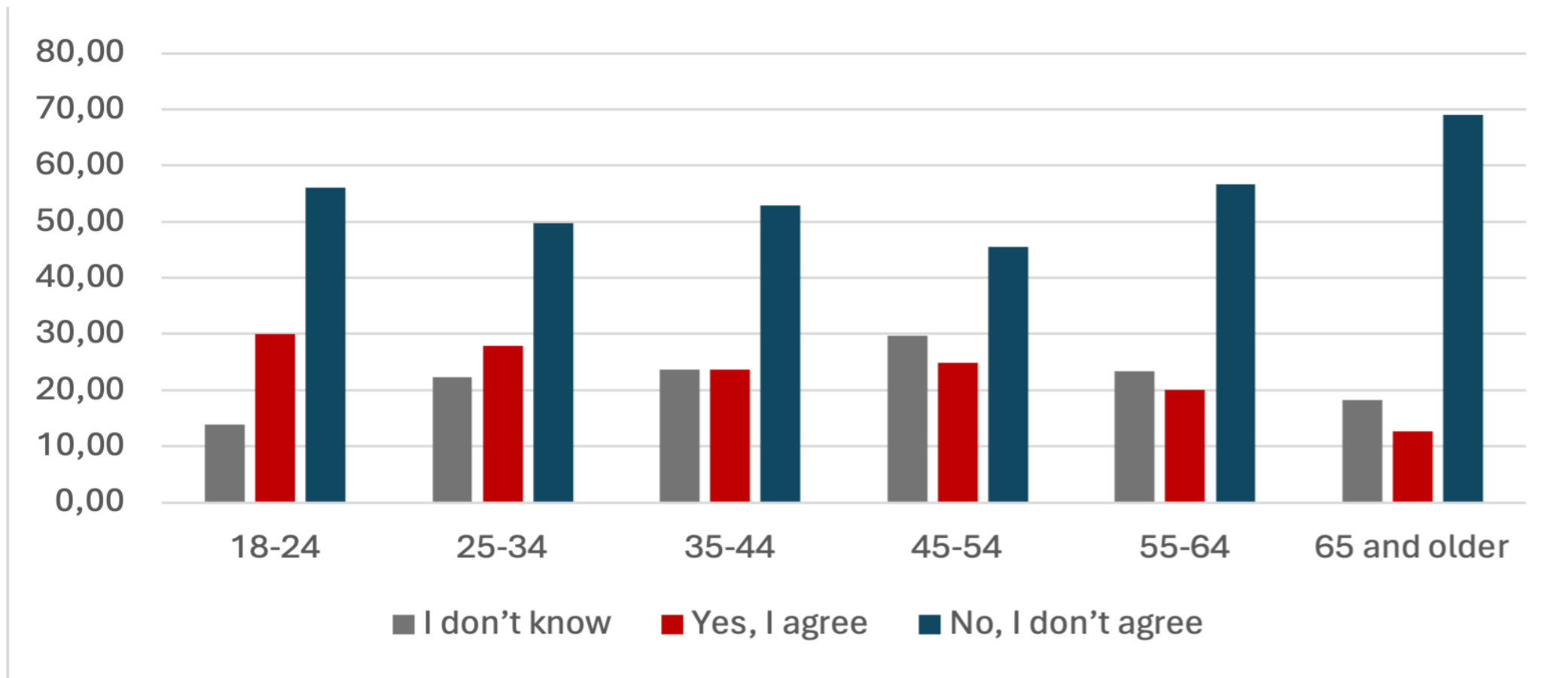
## Asked to those who have seen/heard of e-cigs or HTPs

The distribution of responses to the question  
'Do you agree that cigarette-like smoke-free products are less harmful than cigarettes?'



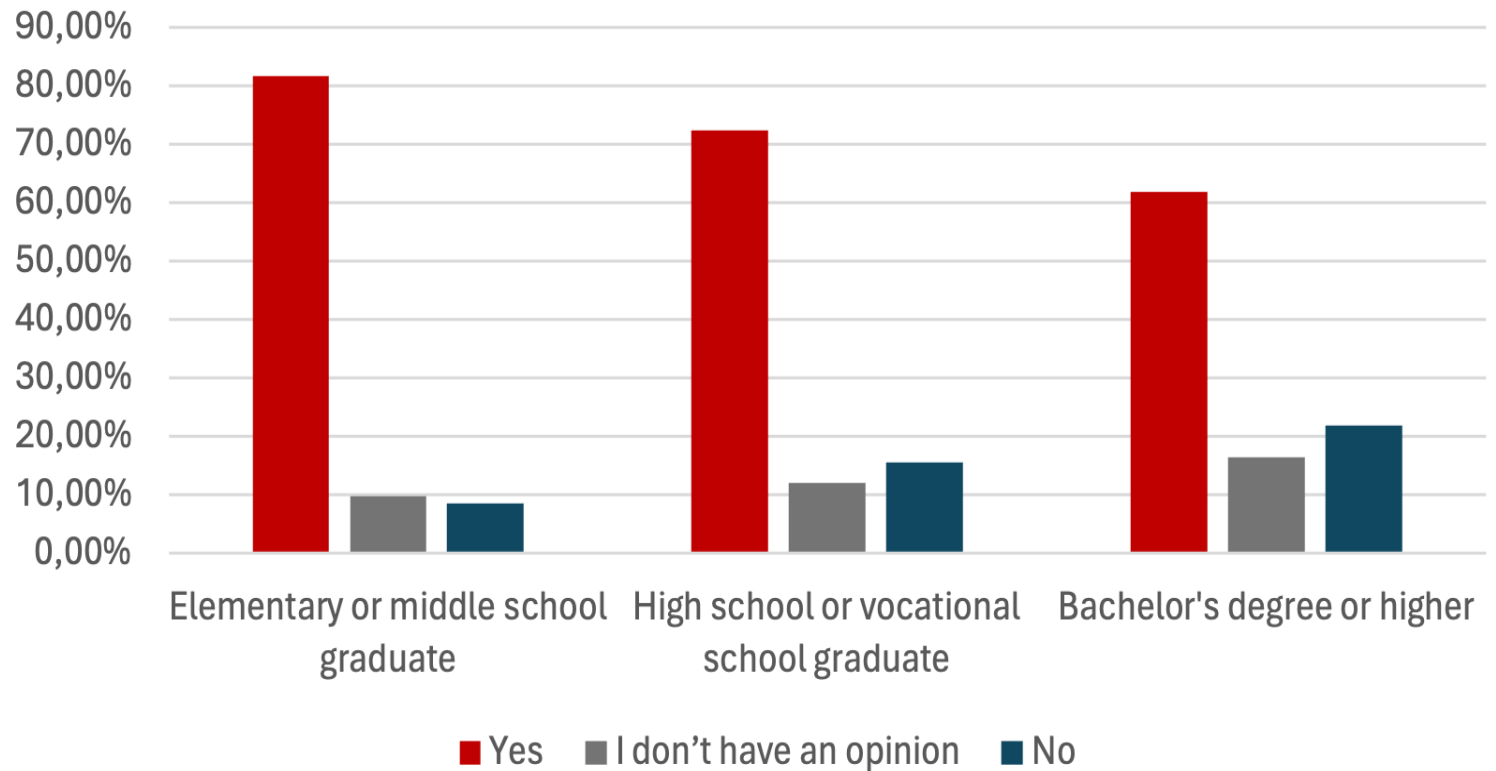
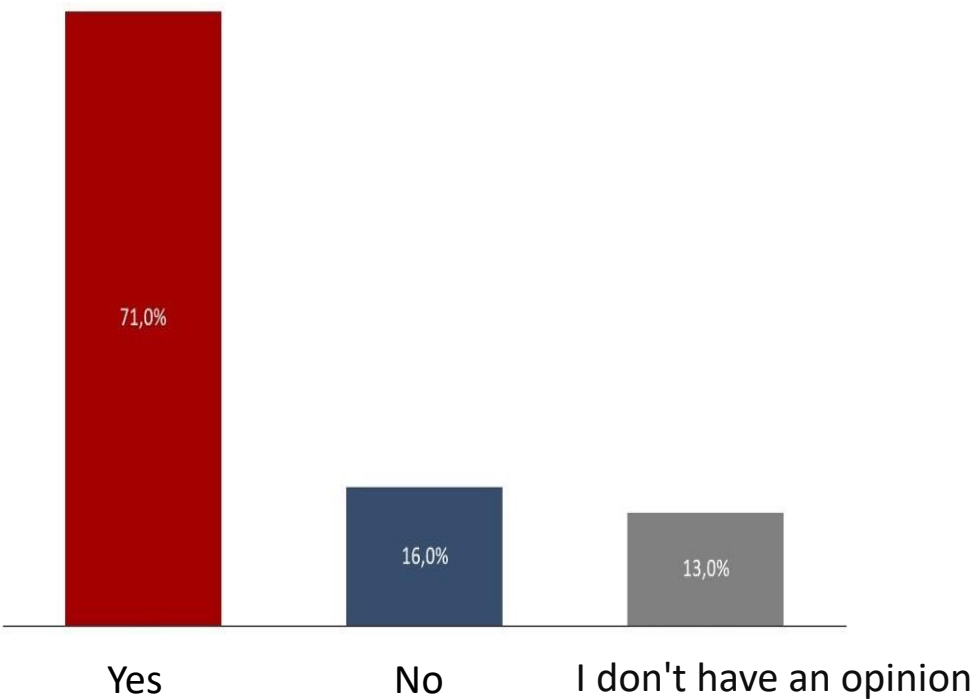
**Asked to those who have seen/heard of e-cigs or HTPs**

The age distribution of responses to the question  
'Do you agree that cigarette-like smoke-free products are less harmful than cigarettes?'



## Asked to those who have seen/heard of e-cigs or HTPs

The distribution of responses to the question 'Do you agree that nicotine is the substance causing cancer in tobacco consumption?' (2023)



# Research by ERAA:

## Part 1: Survey on young adults

*A nationwide online survey in Turkiye among young adults (ages 18-30) with an experimental module*

## Part 2: Discrete Choice Experiment (DCE) on adults

*A DCE as part of an online nationwide survey*

# Part 1: Survey on young adults

*A nationwide online survey in Turkiye  
among young adults (ages 18-30)*

## Impact of Legal Status on Consumer Perception:

- To what extent does the legal status of a product impact consumer perception regarding:
  - *the product's addictiveness;*
  - *health risks;*
  - *social acceptability;*
  - *willingness to use the product?*

## The idea:

- Allocate respondents to different groups.
- Ask them to imagine a situation in which there is only one nicotine product available to them.
- The legal status of the products vary across groups.
- Ask questions about these products.

(A between-subjects design)



# Questions to be asked about the products:

- 1) I think this product is addictive.
- 2) ..... may cause medical complaints such as a bad cough, cold, trouble catching breath, mouth sores.
- 3) ..... may cause serious diseases such as lung cancer.
- 4) ..... is socially acceptable; it is OK to use this product in a social setting.
- 5) I would be interested in using/trying this product.
- 6) If this product were the only one available on the market, I would prefer using nothing to using this product.

# Part 1: Survey on young adults

*A nationwide online survey in Turkiye  
among young adults (ages 18-30)*

## Prevalence and Intensity of Smoking and Vaping

- What are the prevalence and intensity of smoking and vaping?
- What is the distribution of the age of initiation?
- What is the level of general knowledge regarding:
  - *the legal status;*
  - *contents;*
  - *health risks ?*

## General perceptions and health-related concerns: (Ask all respondents)

- E-cigarettes are more harmful to health than combustible cigarettes.
- E-cigarettes are less costly than combustible cigarettes.
- E-cigarettes are more practical and convenient to use than combustible cigarettes.
- I am concerned about the materials, chemicals, and additives in combustible cigarettes.
- I am concerned about the materials, chemicals, and additives in electronic cigarettes.
- I generally have a positive opinion towards the use of e-cigarettes.

# Age at initiation, dependency, type of products used:

How old were you when you first used this product?

Since what age have you been regularly using these products?

How long after waking up do you use it?

Does this product contain nicotine? If so, how much?

Which flavor do you use most often?

	E-cigarettes	HTPs
Every day		
Less than daily but at least once a week		
Less than weekly, but at least once a month		
Less than monthly, but occasionally		
I have quit		
Never		

## Reasons for use: (Ask these to users)

- More cost-effective compared to packaged cigarettes.
- Less harmful compared to packaged cigarettes.
- They smell nice.
- They can be used indoors.
- They are trendy.
- They offer greater opportunities for personalization (choice of liquids, devices, etc.).
- They are good transition products for quitting smoking.
- They are good products to reduce smoking.
- Allows me to adjust the amount of nicotine in this product as I want.
- Allows me to adjust the flavor selections and blends in this product as I want.

# Knowledge on the legal framework in Turkiye: (Ask all respondents)

## Yes or No?

- The sale of packaged cigarettes is legal in Turkiye.
- The sale of cigarette-like products (such as e-cigarettes) is legal in Turkiye.
- The sale of hand-rolled cigarettes is legal in Turkiye.
- The sale of packaged flavored cigarettes is legal in Turkiye.
- In Turkiye, the possession and use of e-cigarettes is permitted /not illegal.
- In Turkiye, the use of e-cigarettes in closed public spaces is permitted.

## Part 2: Discrete Choice Experiment (DCE) on adults

### *A nationwide online survey in Turkiye*

- The main idea behind a DCE:

Show the respondents some choice sets that include products that are hypothetical but very similar to real life products and ask them to make a choice.

Then, examine those choices and gather some information about the tradeoffs involved.

(Suppose there are these products with such and such attributes. Which one would you choose? Or would you opt out and choose neither?)



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**Bilge Nur Mermer**