



Real World Evidence Demonstrating THR Progress



Agenda

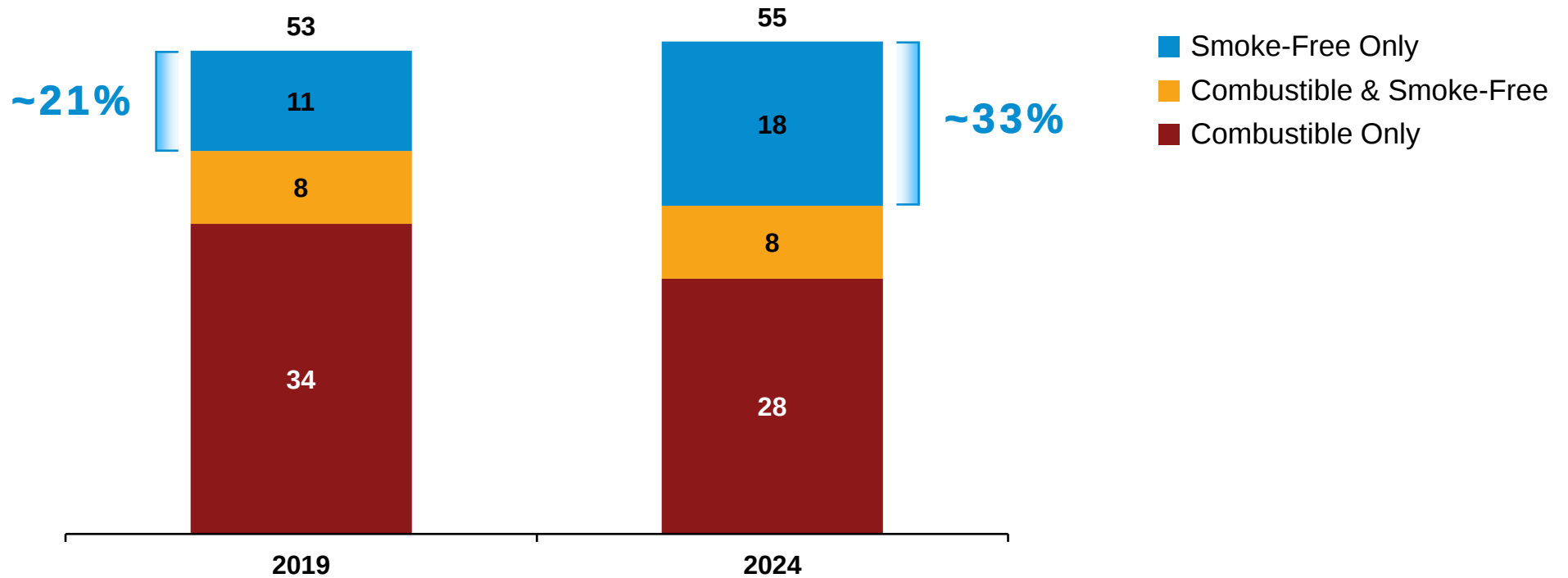
Adult Tobacco Consumer Tracker (ATCT)

Underage Tobacco Use Survey (UTUS)



The Potential for Harm Reduction is Significant

U.S. Adult Nicotine Consumers (twelve months ended, in millions)



Source: ATCT December 2019 - December 2024. Numbers may not foot due to rounding.



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Altria Consumer Tracker – Background

ATCT is a nationally representative, mixed-mode tracking survey

- ≥ 21 years of age,
- n=2400 respondents monthly

designed to measure tobacco use prevalence and transition behavior by category and segment

We share these data to provide timely information on the total prevalence of adult tobacco consumers in the U.S. because:



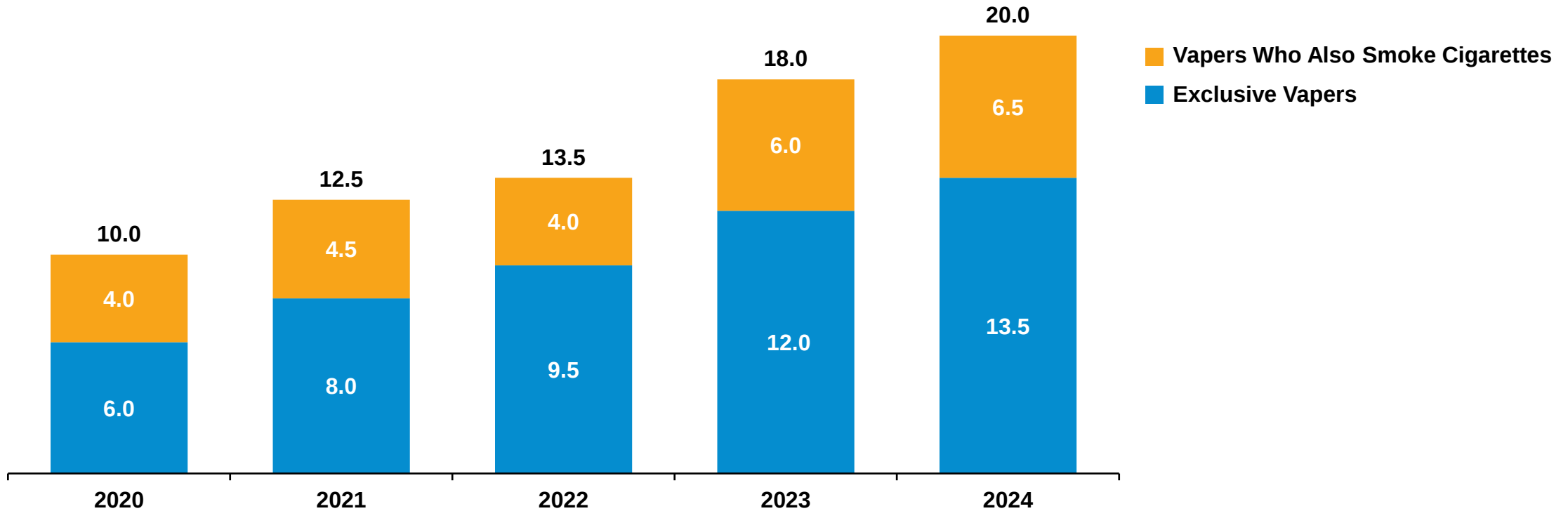
data from nationally representative surveys that measure adult tobacco use prevalence **ARE DELAYED BY >A YEAR**



WE RELEASE QUARTERLY ATCT RESULTS based on 12-month moving averages

E-Vapor Has Been the Most Successful Category Transitioning Smokers

Adult Vapers 21+ – Past 30-Day Usage
(twelve months ended, in millions)



Source: ATCT December 2020 to December 2024. Rounded to nearest 0.5.

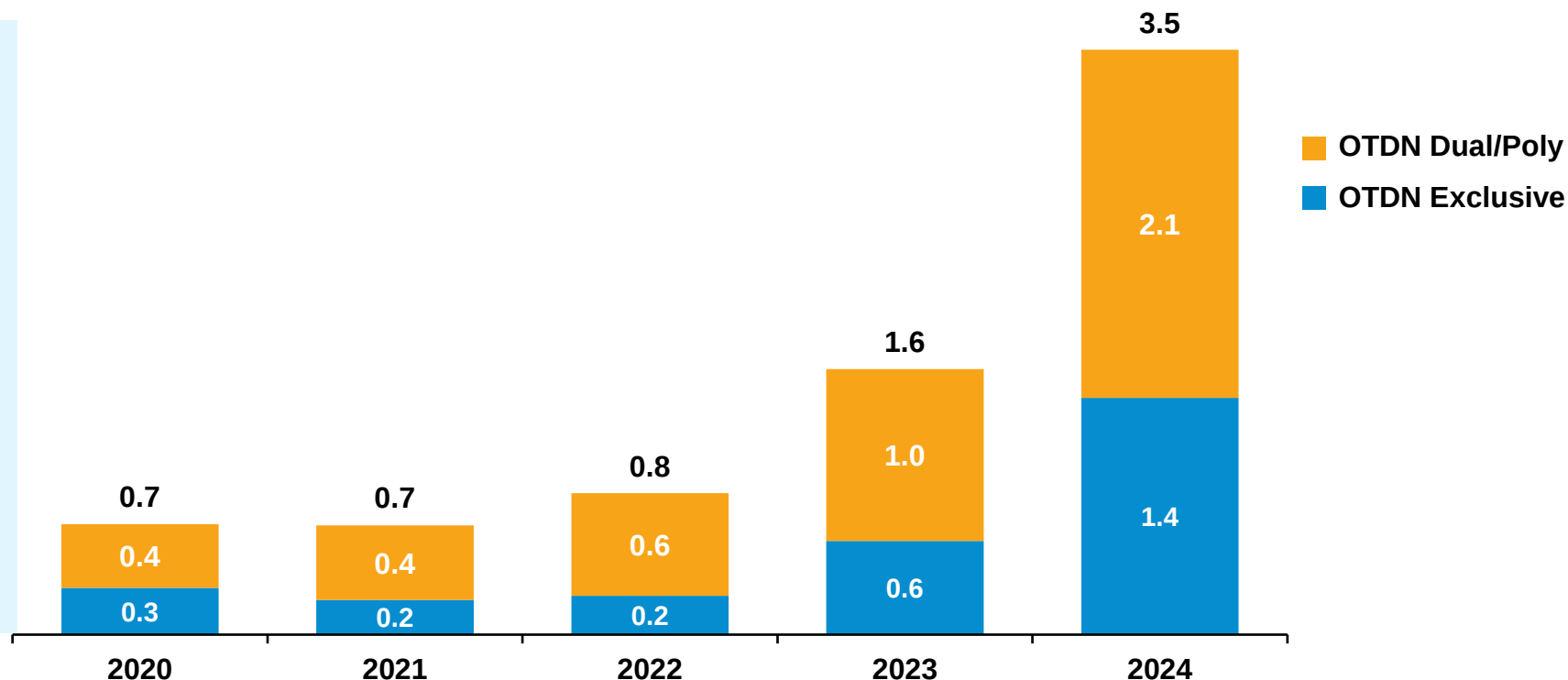


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Number of Adult* OTDN Users

Adult OTDN Users Past 30-Day Usage
(Past 30-Day Usage Based on 12 Moving-Months[†] – in millions)

**OVER THE
PAST 3 YEARS,
nicotine pouch
consumers have
more than tripled
to 3.5 million**



Note: Estimates are based on self-reported any use of OTDN in the past 30 days. Self-reported product use trends may not correspond with changes in sales or shipment volume.

OTDN Exclusive: Using OTDN exclusive of any other tobacco products (q1_onic=1 and q1_tot_tobc=1). OTDN Dual/poly: Using OTDN and at least one or more tobacco products (q1_onic=1 and q1_tot_tobc>1).

*Age 21 or older. [†]Estimates reported at each quarter are made by combining data from the most recent 12 months up to the end of the reporting quarter. Results are based on population weights. Numbers may not foot due to rounding. OTDN=Oral Tobacco-Derived Nicotine.

Source: Altria Client Services LLC Adult Tobacco Consumer Tracker (ALCS ATCT).





UTUS Rationale and Goals



Situation

- The underage tobacco use landscape is changing rapidly
- Government data sources lag emergent use patterns
 - Data are collected once per year or less frequently
 - Long intervals between data collection, dissemination of results and data availability
 - May not include newer products or reflect underage population following Tobacco 21 laws
- Increasing agency desire for underage tobacco use data to support regulatory applications



Goals of UTUS

- Complement government data sources
 - Obtain timely, ongoing surveillance of underage (13-20 years) tobacco use
 - Adapt to the evolving market (e.g., changing brands, product categories)
- Inform our underage prevention efforts and support regulatory applications and related engagement
- Provide public health researchers with biannual updated estimates and access to the data, with some restrictions





Key Study Features

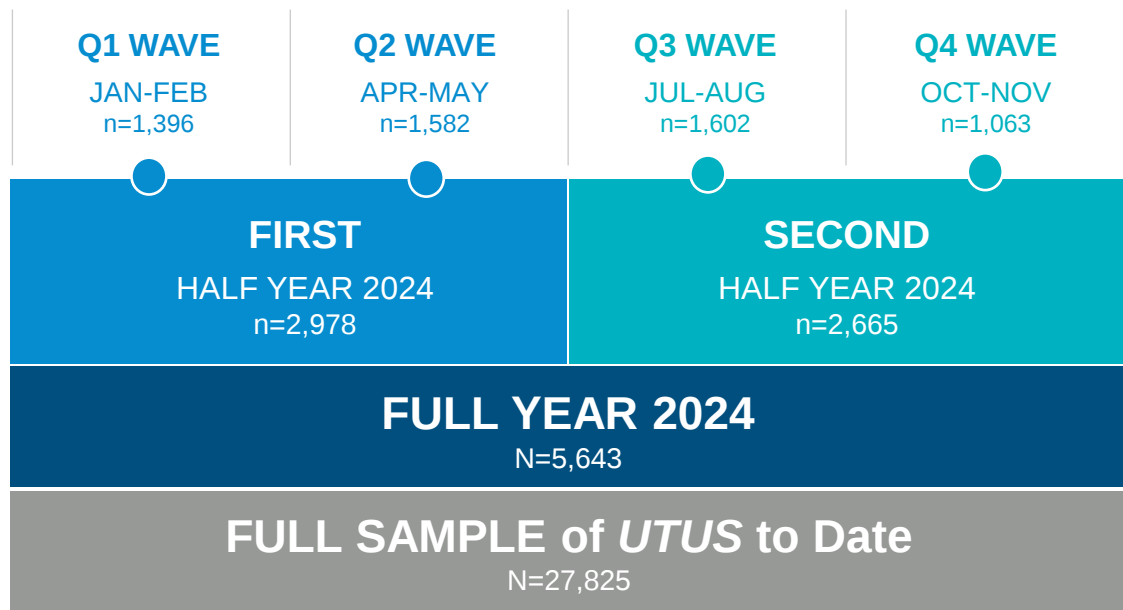


Household dwelling
13–20-year-olds

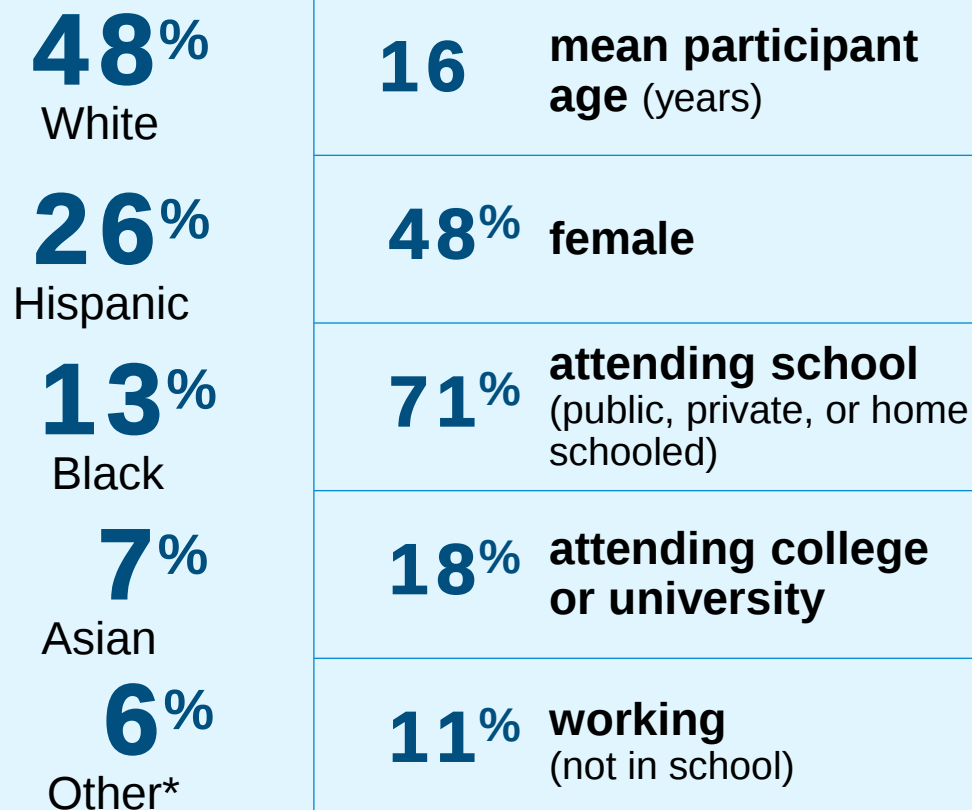
- ✓ **Design/Sampling**
Repeated cross-sectional study. Address-based stratified random sampling
- ✓ **Frequency of Data Collection**
Quarterly
- ✓ **Target Sample Size**
1250/quarter (approx. 5000/year)
- ✓ **IRB Status**
Approved
- ✓ **Administration Mode**
Online self-administration and phone interview. Accessible in English and Spanish languages



Overview of UTUS 2024 Full-year Sample



2024 Full-Year-Sample Participant Characteristics



Numbers (n) represent unweighted counts, percent (%) represent weighted proportions.
UTUS=Underage Tobacco Use Survey.

*'Other' includes Non-Hispanic Native American/Hawaiian, Alaska Native, and Other Pacific Islander.

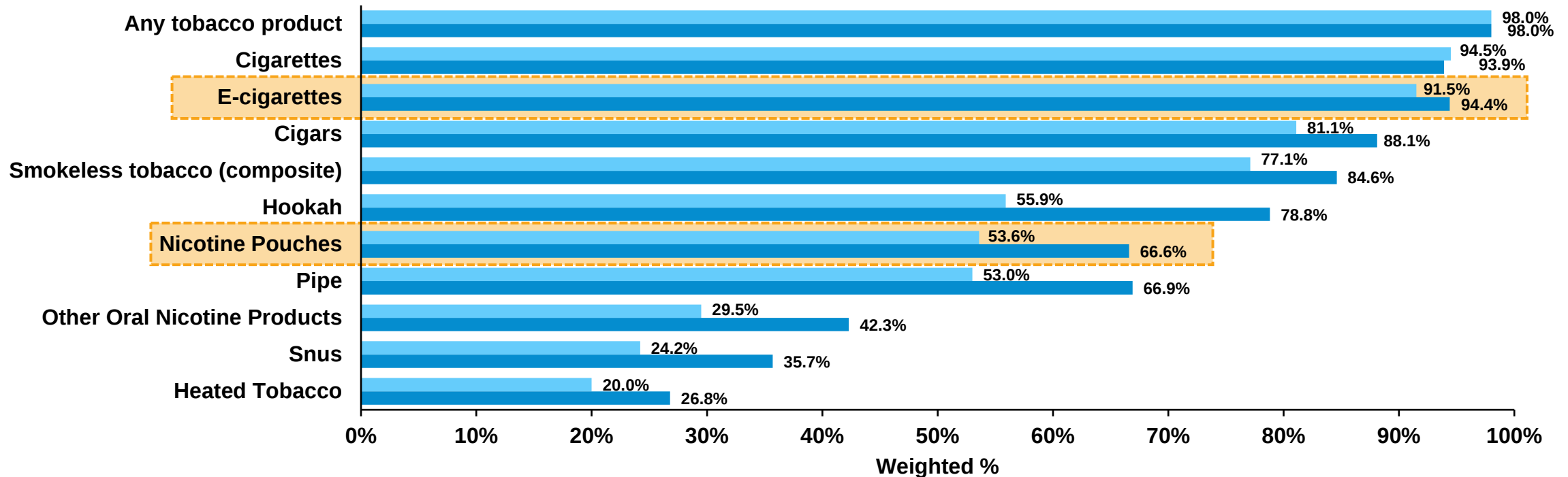


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Estimated Awareness of Tobacco and Nicotine Products by Age Group

Awareness of Tobacco and Nicotine Products Data from UTUS HY1 2025

■ Ages 13-17 (n=1297) ■ Ages 18-20 (n=1129)



'Awareness' of each tobacco product category was assessed with the question: "Have you ever seen or heard of ... before this study?" Awareness of any tobacco product was defined as being aware of one or more of the ten categories assessed.

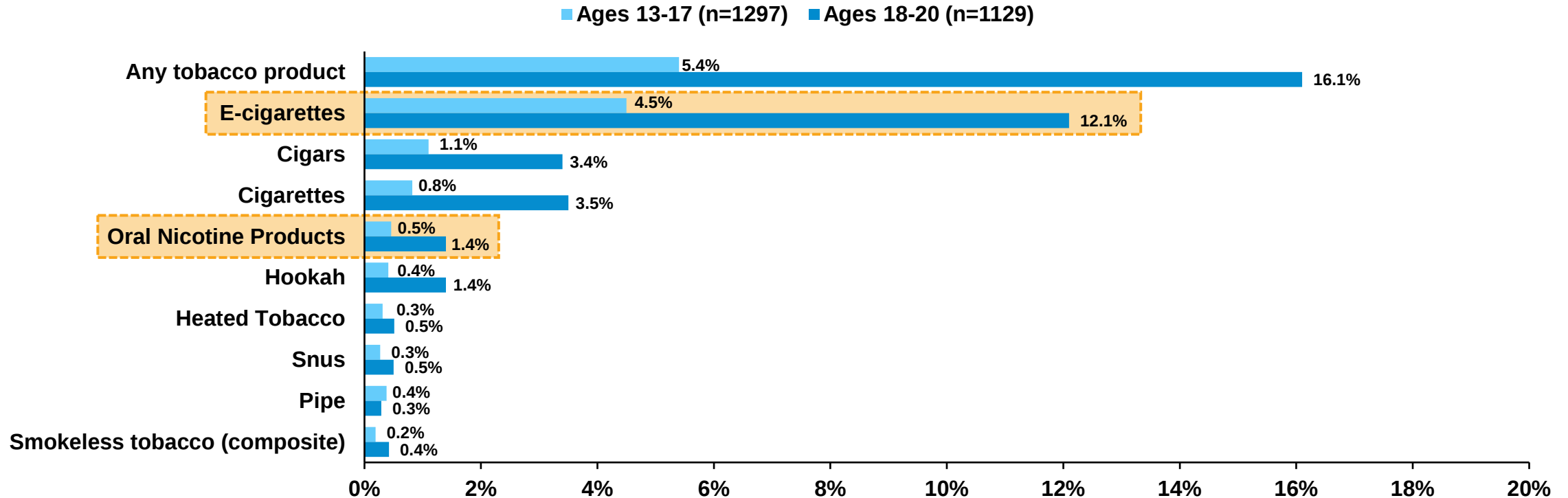
Data Source: ALCS UTUS, January – May 2025



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Estimated Past-30-Day Use of Tobacco and Nicotine Products by Age Group

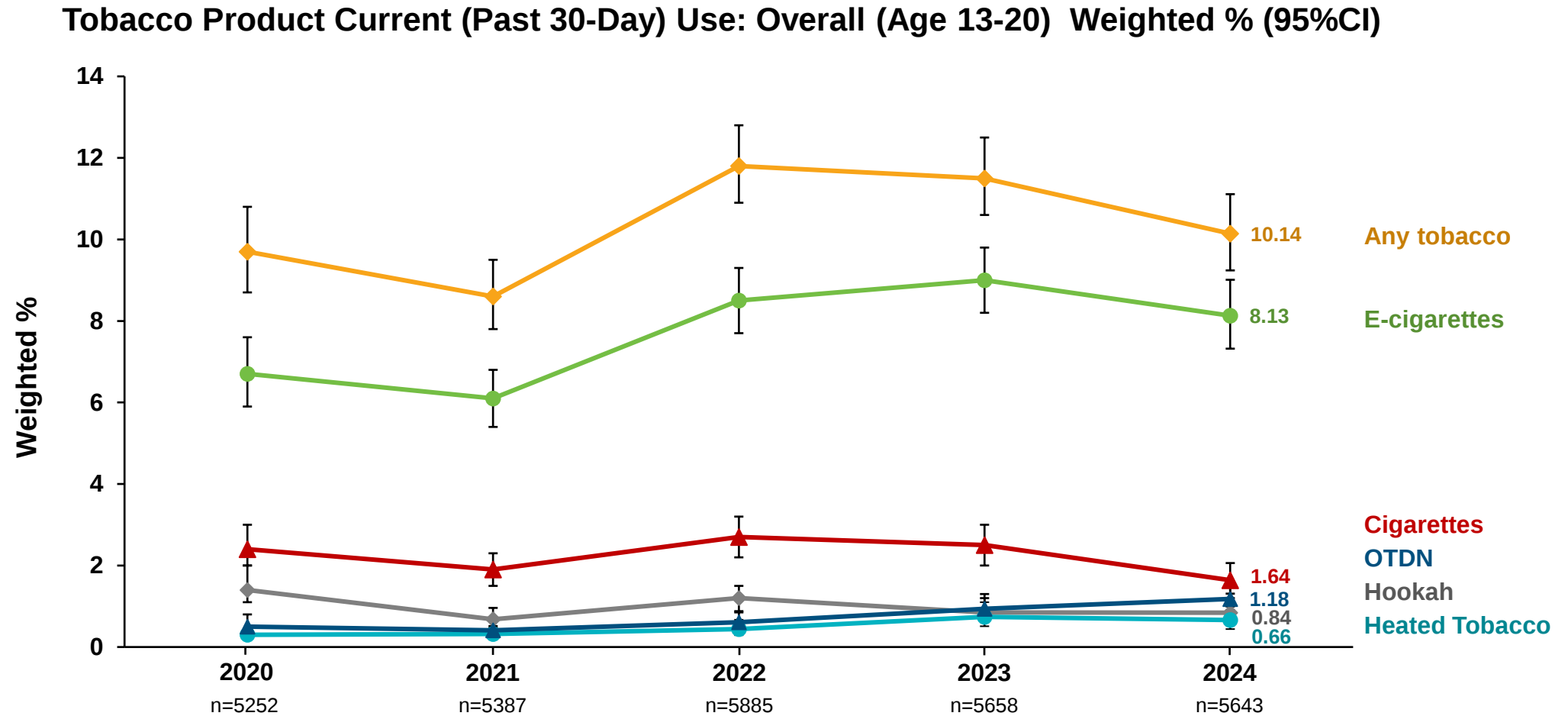
Estimated Past-30-Day Use of Tobacco and Nicotine Products Data from UTUS HY1 2025



'Current use' of each tobacco product category was defined as having used the product at least once in the past 30 days. This was assessed among ever-users with the question: "When was the last time you used [...], even one or two times? (Please select the first answer that fits.)" Current use of any tobacco product was defined as having used one or more of the nine individual tobacco categories in the 30 days prior to taking the survey.
Data Source: ALCS UTUS, January – May 2025



While Awareness of ONPs Is High Among 13-to-20-year-olds Current P30D Use Rates Remained Relatively Stable

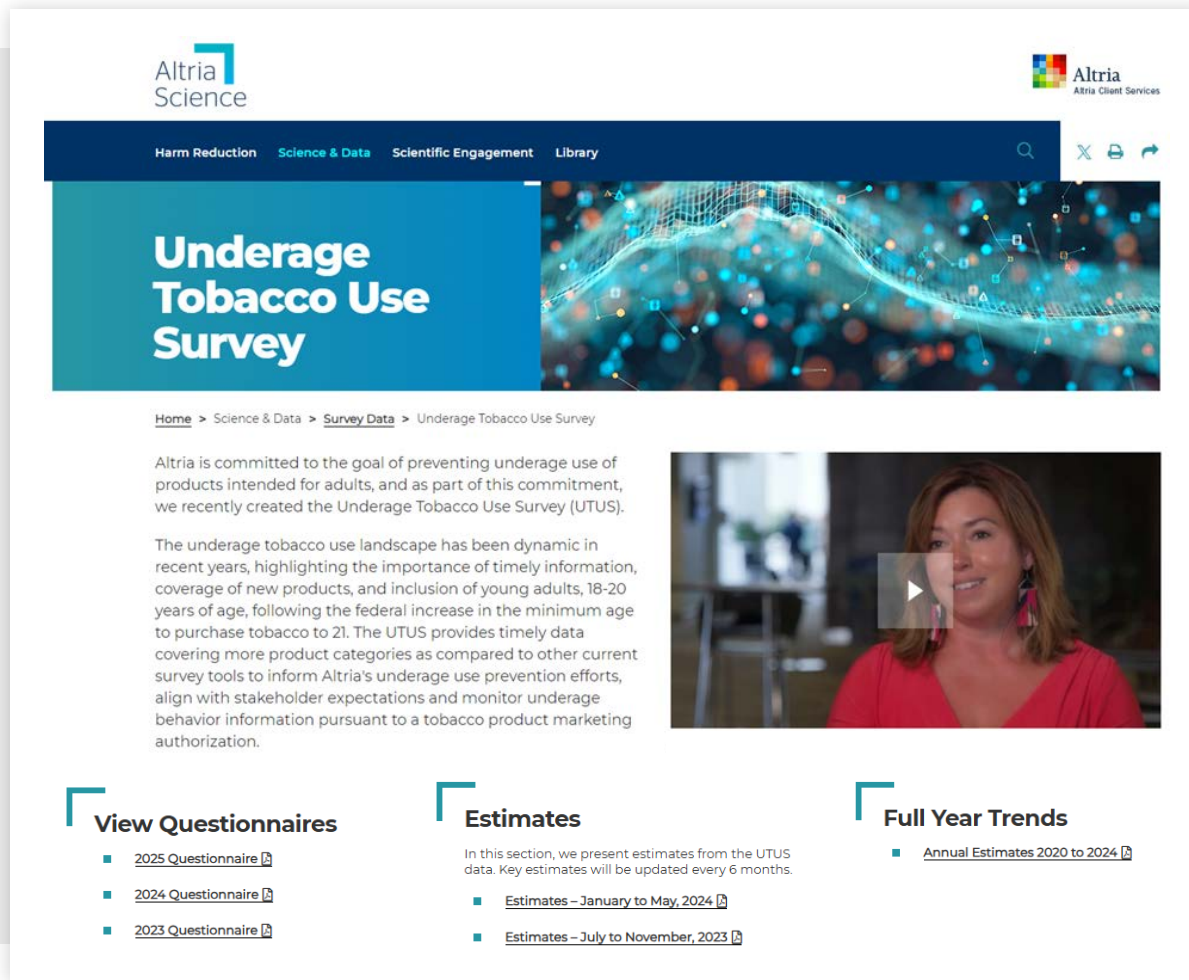


ONP=on!® Nicotine Pouches; P30D=Past 30-day.



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Find out more about the UTUS at the Altria Science Website



The screenshot shows the Altria Science website with the following content:

- Header:** Altria Science logo, navigation links (Harm Reduction, Science & Data, Scientific Engagement, Library), and a search bar.
- Hero Section:** A large blue banner with the text "Underage Tobacco Use Survey" and a background image of a DNA helix.
- Breadcrumbs:** Home > Science & Data > Survey Data > Underage Tobacco Use Survey
- Text:**

Altria is committed to the goal of preventing underage use of products intended for adults, and as part of this commitment, we recently created the Underage Tobacco Use Survey (UTUS).

The underage tobacco use landscape has been dynamic in recent years, highlighting the importance of timely information, coverage of new products, and inclusion of young adults, 18-20 years of age, following the federal increase in the minimum age to purchase tobacco to 21. The UTUS provides timely data covering more product categories as compared to other current survey tools to inform Altria's underage use prevention efforts, align with stakeholder expectations and monitor underage behavior information pursuant to a tobacco product marketing authorization.
- Video:** A video player showing a woman speaking.
- View Questionnaires:**
 - 2025 Questionnaire [\[Link\]](#)
 - 2024 Questionnaire [\[Link\]](#)
 - 2023 Questionnaire [\[Link\]](#)
- Estimates:**

In this section, we present estimates from the UTUS data. Key estimates will be updated every 6 months.

 - Estimates – January to May, 2024 [\[Link\]](#)
 - Estimates – July to November, 2023 [\[Link\]](#)
- Full Year Trends:**
 - Annual Estimates 2020 to 2024 [\[Link\]](#)

See more at
[Underage Tobacco Use Survey](#)
[- Altria Science](#)

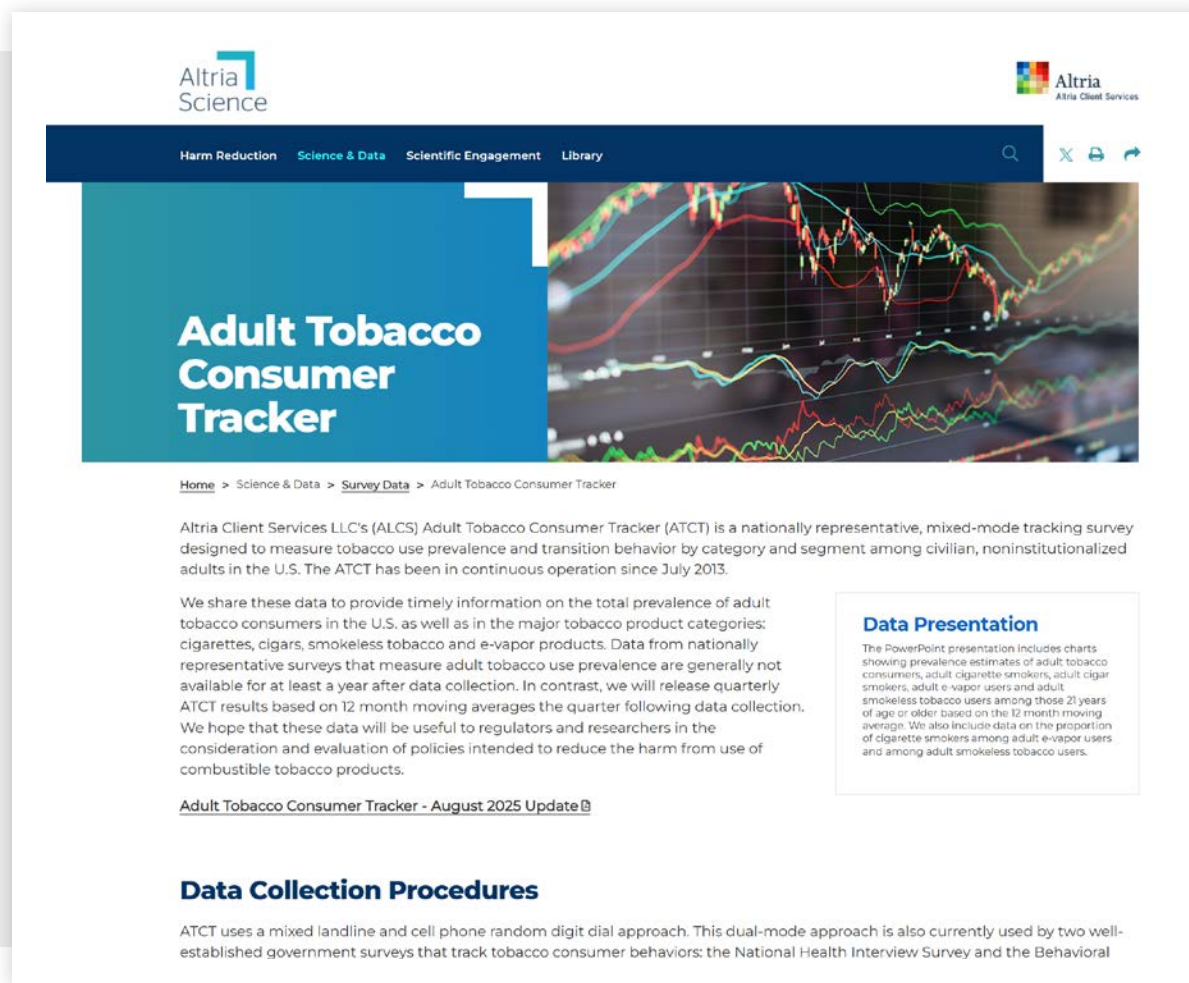
or

SCAN QR CODE



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Find out more about the ATCT at the Altria Science Website



See more at
[Adult Tobacco Consumer Tracker](#)
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or

SCAN QR CODE



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