

# TMA AIT Poll

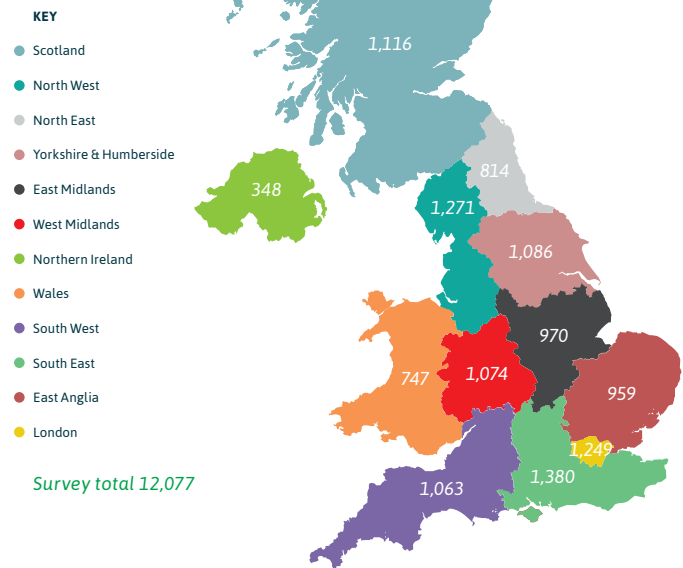
## Introduction

In April 2014 the TMA commissioned a nationwide online survey into adult smokers (18+) awareness, behaviour and attitudes towards illicit tobacco. The questions received input from HM Revenue & Customs and other stakeholders such as the media. The survey of 12,077 smokers was conducted online during April 2014.

## Key Findings

- 71% of adult smokers never buy from non-shop sources
- 29% that buy from non-shop sources cite; abroad, friends and family, in the street and pubs
- 30% of adults smokers are aware of illicit tobacco being sold in their area although only 1 in 7 of these reported it to the authorities
- 59% who have not reported illegal tobacco said they did not do so, as it was "none of their business"
- 69% of those who had seen Jin Ling had gone on to make a purchase

## 2014 Survey



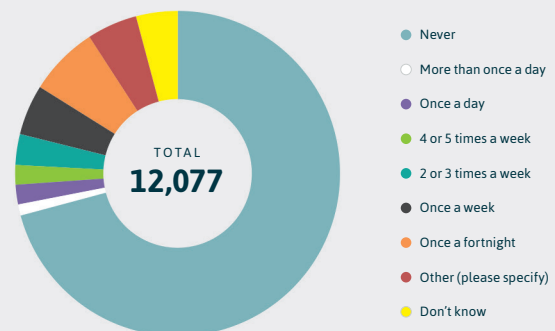
## Purchasing Behaviour

### Where do you buy your tobacco products?

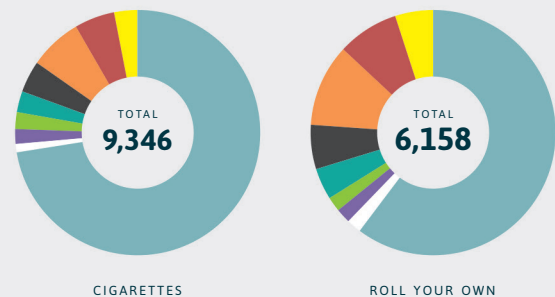
LOCATION	CIGARETTES		ROLL YOUR OWN	
	COUNTS	COL %	COUNTS	COL %
corner shops / newsagents	6,735	72%	4,341	70%
supermarkets	7,572	81%	4,730	77%
in the street	6,735	5%	409	7%
markets / car boot sales	451	3%	288	5%
vans (e.g. ice cream vans)	315	2%	199	3%
workplace	221	3%	283	5%
private houses ('fag houses')	298	3%	279	5%
from friends & family	266	7%	791	13%
abroad	1,504	16%	1,124	18%
internet	284	3%	259	4%
pubs	442	5%	334	5%
other	114	1%	88	1%
don't know	5	0%	6	0%
<b>Total</b>	<b>9,346</b>	<b>100%</b>	<b>6,158</b>	<b>100%</b>

### How often do you buy tobacco from 'non-shop' sources – e.g. friends, in the street, from market stalls?

BASE: 12,077 | ALL INTERVIEWS | NO WEIGHTING



### Which of the following do you smoke at all nowadays?



## Types of Product

Have you seen any of the following known non-shop brands being sold or smoked?

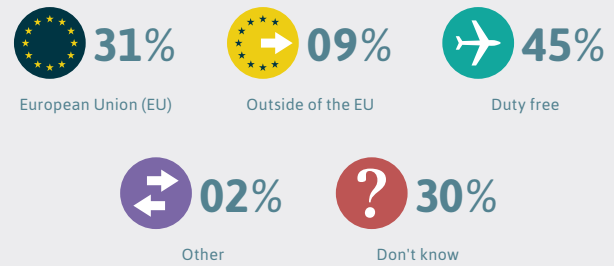
NON SHOP BRAND		CIGARETTES		ROLL YOUR OWN	
		COUNTS	COL %	COUNTS	COL %
"Jin Ling"	seen?	719	8%	584	9%
	not seen?	1,845	20%	1,750	28%
"Bon"	seen?	437	5%	352	6%
	not seen?	2,127	23%	1,982	32%
"Richman"	seen?	1,109	12%	896	15%
	not seen?	1,455	16%	1,438	23%
"Master"	seen?	545	6%	420	7%
	not seen?	2,019	22%	1,914	31%
"Business Royals"	seen?	630	7%	510	8%
	not seen?	1,934	21%	1,824	30%
"JIM"	seen?	484	5%	372	6%
	not seen?	2,080	22%	1,962	32%
"em@il"	seen?	273	3%	208	3%
	not seen?	2,291	25%	2,126	35%
"MG"	seen?	483	5%	368	6%
	not seen?	2,081	22%	1,966	32%
"Park"	seen?	758	8%	627	10%
	not seen?	1,806	19%	1,707	28%
"Raquel"	seen?	553	6%	441	7%
	not seen?	2,011	22%	1,893	31%

Have you purchased any of the following known non-shop brands?

NON SHOP BRAND		CIGARETTES		ROLL YOUR OWN	
		COUNTS	COL %	COUNTS	COL %
"Jin Ling"	purchased	499	5%	421	7%
	not purchased	220	2%	163	3%
"Bon"	purchased	282	3%	244	4%
	not purchased	155	2%	108	2%
"Richman"	purchased	671	7%	534	9%
	not purchased	438	5%	362	6%
"Master"	purchased	328	4%	278	5%
	not purchased	217	2%	142	2%
"Business Royals"	purchased	323	3%	276	4%
	not purchased	307	3%	234	4%
"JIM"	purchased	204	2%	151	2%
	not purchased	280	3%	221	4%
"em@il"	purchased	143	2%	111	2%
	not purchased	130	1%	97	2%
"MG"	purchased	195	2%	154	3%
	not purchased	288	3%	214	3%
"Park"	purchased	294	3%	234	4%
	not purchased	464	5%	393	6%
"Raquel"	purchased	325	3%	264	4%
	not purchased	228	2%	177	3%

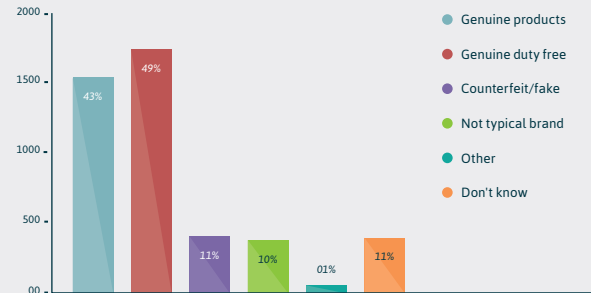
Where do you think the non-shop brands that you buy come from?

BASE: 3,539 | ALL INTERVIEWS | NO WEIGHTING

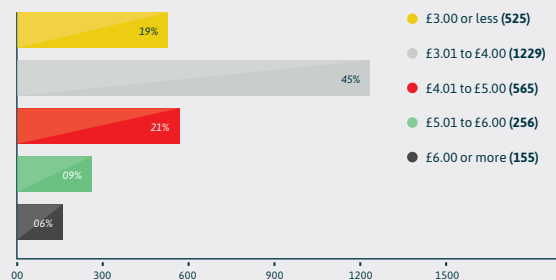


If you have purchased non-shop products, how would you describe them?

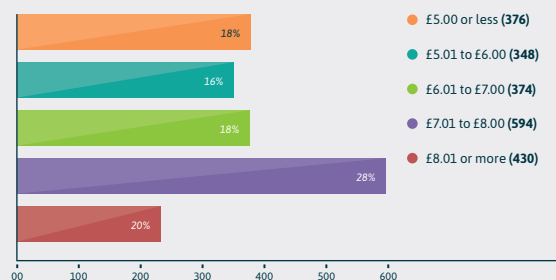
BASE: 3,539 | ALL INTERVIEWS | NO WEIGHTING



When you have seen these tobacco products being sold, what price range have they been within for a pack of 20 cigarettes?

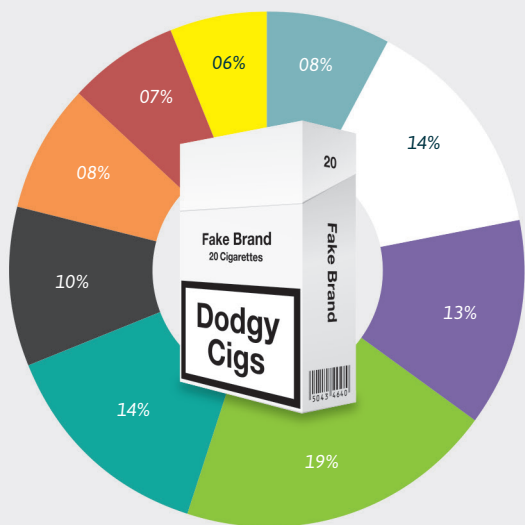


When you have seen these tobacco products being sold, what price range have they been for a pack of 50g rolling tobacco?

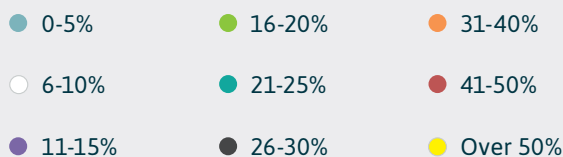


# Awareness and Reporting

TMA AIT POLL | 12,077 ADULT SMOKERS (UNWEIGHTED)

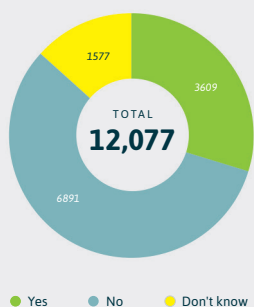


## What proportion of the UK cigarette market do you think is illicit?



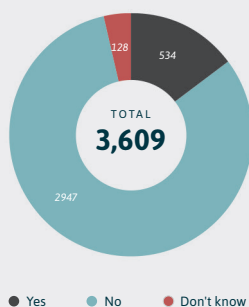
Are you aware of illicit (UK tax has not been paid) tobacco products being sold in your area?

BASE: 12,077 | ALL INTERVIEWS | NO WEIGHTING



Have you reported the sale of these illicit tobacco products to anyone in the past 12 months?

BASE: 3,609 | ALL INTERVIEWS | NO WEIGHTING



If you have not reported the sale of illicit tobacco to anyone, why was that?

BASE: 3,075 | ALL INTERVIEWS | NO WEIGHTING

**18%** I didn't know who to tell

I was afraid to tell anyone in case I got in to trouble **13%**

**59%** It's none of my business

If so, where have you seen these tobacco products sold?

LOCATION	CIGARETTES		ROLL YOUR OWN	
	COUNTS	COL %	COUNTS	COL %
In the street	885	32%	709	33%
Markets or car boot sales	740	27%	566	27%
Pubs	1136	42%	949	45%
Vans (e.g. Ice cream vans)	199	7%	159	7%
Private houses ('fag houses')	604	22%	491	23%
From friends and family	582	21%	552	26%
Schools	83	3%	60	3%
Corner shops/newsagents	514	19%	378	18%
Internet	196	7%	156	7%
Other	80	3%	51	2%
Don't know	237	9%	159	7%
<b>Total</b>	<b>2730</b>	<b>100%</b>	<b>2122</b>	<b>100%</b>

If you have reported the sale of illicit tobacco in the past 12 months, who was it to?

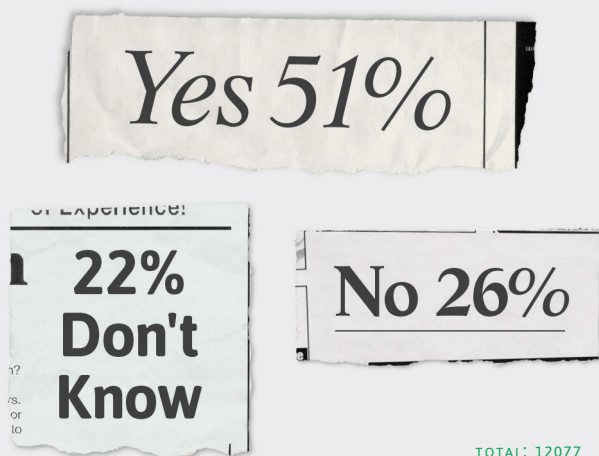
BASE: 534 | ALL INTERVIEWS | NO WEIGHTING



## Deterrents

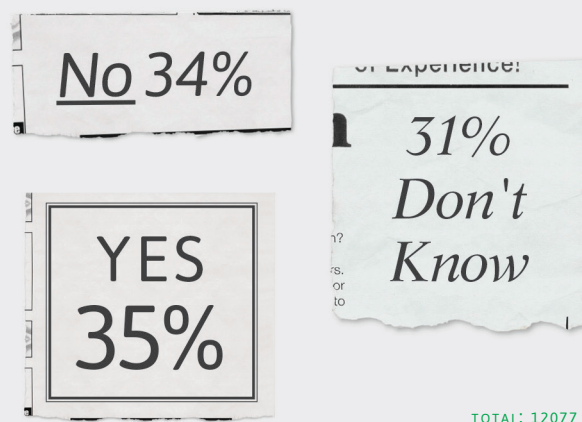
Would reading an article about the dangers of illicit tobacco in your local paper put you off buying illegal cigarettes?

BASE: 12077 | ALL INTERVIEWS | NO WEIGHTING



Would reading an article about illicit tobacco in your local paper encourage you to report information about dealers?

BASE: 12077 | ALL INTERVIEWS | NO WEIGHTING



Who do you think benefits from selling illicit tobacco products?

GROUP	CIGARETTES		ROLL YOUR OWN	
	COUNTS	COL %	COUNTS	COL %
Organised criminals selling illicit tobacco products, and counterfeit products	6444	69%	3829	62%
Street sellers	4238	45%	2605	42%
Family and friends	1407	15%	1131	18%
Shopkeepers	1363	15%	830	13%
Smokers	3101	33%	2345	38%
Other	101	1%	88	1%
Don't know	857	9%	616	10%
<b>Total</b>	<b>9346</b>	<b>100%</b>	<b>6158</b>	<b>100%</b>

What reasons can you think of for smokers to avoid buying illicit tobacco products?

REASON	CIGARETTES		ROLL YOUR OWN	
	COUNTS	COL %	COUNTS	COL %
Poor quality product	5834	62%	3787	61%
Don't know what's in them	6504	70%	4113	67%
Do not want to get into trouble	3747	40%	2333	38%
Want to support a known, legitimate brand	1305	14%	827	13%
Want to buy legitimately as a taxpayer	2110	23%	1274	21%
Other	120	1%	105	2%
Don't know	599	6%	476	8%
<b>Total</b>	<b>9346</b>	<b>100%</b>	<b>6158</b>	<b>100%</b>

## In Brief

**29%** of smokers surveyed said they buy their tobacco from non-shop sources

40% of respondents thought an adult could bring back 200 cigarettes into the UK from the EU per trip



**22%** of smokers think there are sufficient social, political and media deterrents to dissuade people from selling illicit tobacco products

**Q** What motivates you to buy non-shop products?

**A** The Price or cheaper product was the typical survey answer...

**30%** of smokers surveyed said they are aware illicit tobacco is sold in their area

Please provide examples of the brands that you typically buy from non-shop sources? Number of mentions in ● incorporates spelling variations

Amber Leaf	705	Marlboro	325
Mayfair	155	Benson & Hedges	200
Drum	150	Turner	143
Sterling	72	Cutters Choice	150
Golden Virginia	804	Lambert & Butler	170