

TMA Smokers' Anti-Illicit Trade Survey 2016: Attitudes, Awareness and Understanding

In June 2016, the TMA commissioned a nationwide online survey into 12,000 adult smokers' (18+) awareness, behaviour and attitudes towards illicit tobacco. The questions received input from HM Revenue and Customs and other stakeholders, such as the media. The 2016 results supplement those of similar surveys that the TMA conducted in 2015 and 2014.

Key Findings

71%

Proportion of smokers who purchase non-UK duty paid tobacco products

20%

Proportion of adult smokers who are aware of illicit tobacco being sold in their area

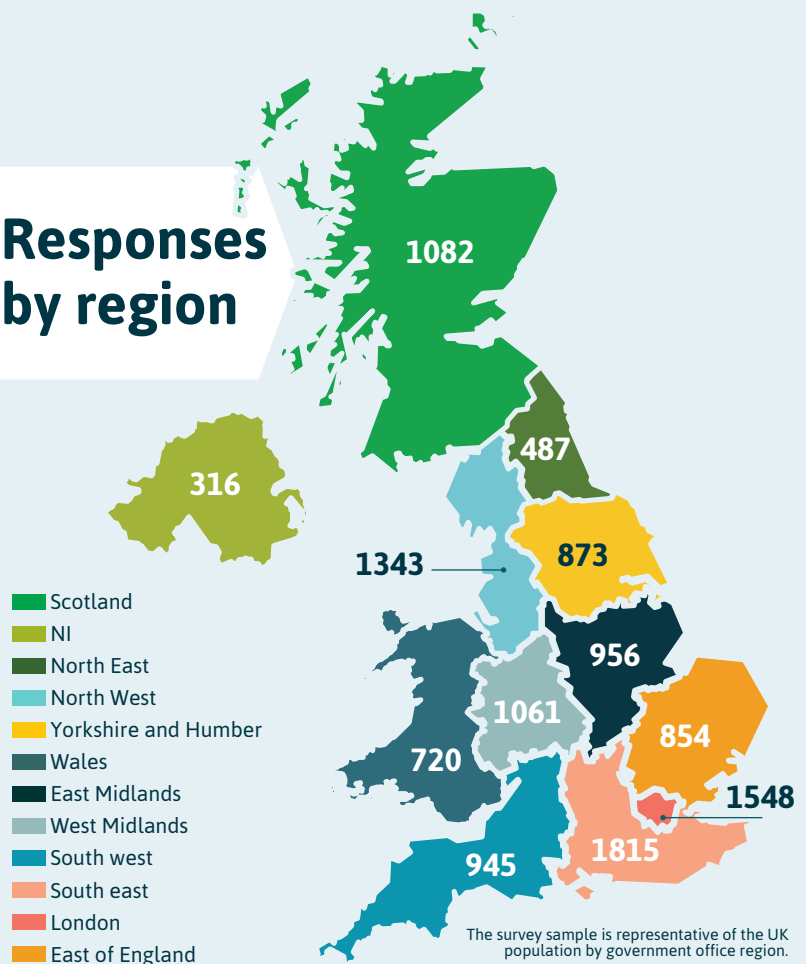
20%

Proportion of smokers aware of illicit tobacco being sold in their area and have reported it to the authorities

57%

Proportion of smokers who have not reported the sale of illegal tobacco because it was "none of their business"

Responses by region



Survey total = 12,000

Overall Purchasing Patterns

Key Information

- Smokers in the UK continue to purchase their tobacco products through conventional retail channels for the most part, such as newsagents and supermarkets.
- Smokers' purchasing patterns remain largely consistent with previous surveys (2014 & 2015), particularly in regard to purchases from supermarkets and corner shops/newsagents.
- The most significant change to smokers' behaviour in previous years has taken place in internet purchases, which have increased significantly since 2014.

Where do you buy your tobacco products?



Location	Whole	CIG	RYO
Private houses (so-called 'fag houses')	307	3%	4%
From friends and family	1050	9%	13%
Festivals / Pubs / Bars	728	6%	8%
Internet (typical high street retailer providing online delivery service)	522	4%	5%
Internet (social media and/or websites advertising cheap tobacco)	311	3%	3%
Someone selling in a pub	460	4%	6%
People in the street (i.e.: individuals in public place not listed above)	259	2%	3%
Abroad (in a local shop when travelling outside the UK)	1978	16%	17%
Duty Free shop (at the airport, ferry or Eurotunnel)	2308	19%	19%
Other	82	1%	1%
Don't know	12	0%	0%

How often do you buy tobacco from the following sources?

BASE: 12,000 | ALL INTERVIEWS | NO WEIGHTING

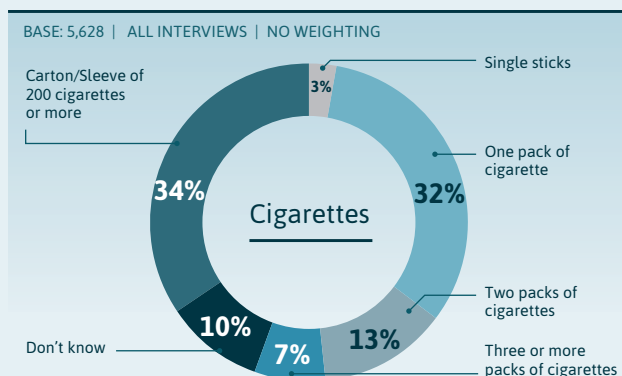
Location	Never	More than once a day	Once a day	Four or five times a week	Two or three times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Don't know
Markets or car boot sales	80%	2%	2%	2%	2%	2%	1%	1%	5%	4%
Vans (e.g. ice cream vans)	82%	1%	2%	1%	1%	1%	1%	1%	5%	5%
Workplace	79%	1%	2%	2%	2%	2%	1%	1%	5%	4%
Private houses (so-called 'fag houses')	81%	1%	1%	2%	2%	2%	1%	1%	5%	5%
From friends and family	67%	1%	1%	2%	3%	3%	4%	4%	13%	4%
Festivals / Pubs / Bars	68%	1%	1%	2%	2%	3%	2%	4%	12%	4%
Internet (typical high street retailer providing online delivery service)	75%	1%	1%	2%	2%	3%	2%	3%	6%	4%
Internet (social media and/or websites advertising cheap tobacco)	81%	1%	1%	2%	2%	2%	1%	2%	5%	5%
Someone selling in a pub, bar or café i.e. a non-employee	77%	1%	1%	2%	2%	2%	2%	2%	7%	5%
People in the street (i.e.: individuals in public place not listed above)	80%	1%	1%	1%	2%	2%	1%	1%	5%	5%
Abroad (in a local shop when travelling outside the UK)	43%	1%	2%	2%	2%	2%	2%	3%	37%	6%
Duty Free shop (at the airport, ferry or Eurotunnel)	39%	1%	1%	1%	2%	2%	2%	4%	41%	6%

Non-Duty Paid Purchasing Patterns

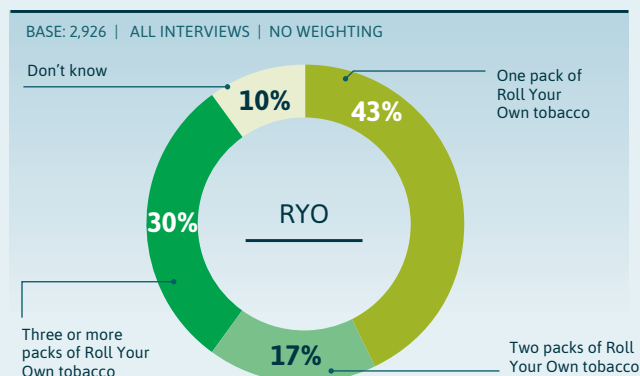
Key Information

- 71% of all smokers admit to purchasing non-shop tobacco in one form or another. This can vary from those who purchase legal duty free once a year to those who buy illegal tobacco from unscrupulous dealers on a daily basis.
- 66% of UK smokers have seen or been offered what they believe to be non-UK duty paid UK branded tobacco products in their area.
- The average spend per week of smokers who admit to having purchased tobacco from a 'non-shop' source is £8.35.

On each occasion, you purchase cigarettes from a 'non-shop' source, how much do you buy?



On each occasion you purchase RYO from a 'non-shop' source, how much do you buy?



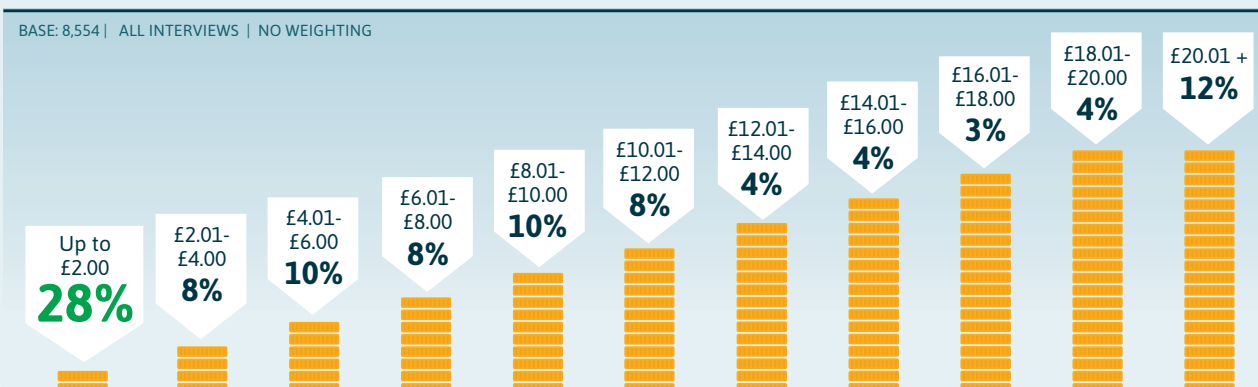
Have you seen any of the following known non-shop brands being sold or smoked?

2016			2015		
Brand	Count	Col%	Location	Count	Col%
Richman	2734	23%	Richman	2140	18%
Park	1500	13%	Jin Ling	1281	11%
Jin Ling	1446	12%	Park	1319	11%
President	1439	12%	President	1175	10%
Business Royals	1142	10%	Gold Mount	947	8%
Palace	1099	9%	Palace	952	8%
Gold Mount	1010	8%	Business Royals	893	7%
JIM	1006	8%	Domingo	714	6%
MG	916	8%	JIM	762	6%
Springfield	999	8%	Raquel	682	6%
The Turner	906	8%	Eastender	615	5%
Eastender	856	7%	Golden Medway	571	5%
Master	838	7%	Master	597	5%
NZ Gold	856	7%	MG	667	5%
Raquel	779	6%	The Turner	609	5%
Bon	600	5%	Bon	506	4%
em@il	647	5%	em@il	480	4%
Fest / PECT	465	4%	Fest	393	3%

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

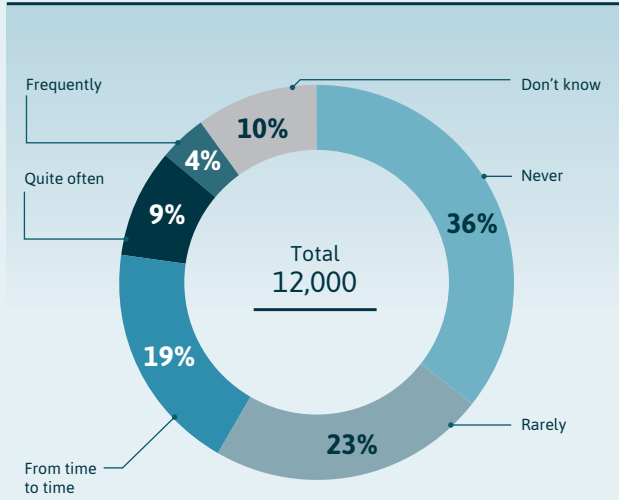
2016			2015		
Brand	Count	Col%	Location	Count	Col%
The Turner	442	49%	The Turner	280	46%
Jin Ling	692	48%	Bon	213	42%
Bon	258	43%	Jin Ling	533	42%
Master	362	43%	Master	241	40%
Eastender	363	42%	em@il	186	39%
em@il	243	38%	Fest	155	39%
NZ Gold	314	38%	Eastender	236	38%
Raquel	284	36%	Domingo	257	36%
Springfield	364	36%	Golden Medway	193	34%
Business Royals	392	34%	Raquel	234	34%
JIM	339	34%	Palace	307	32%
Richman	917	34%	JIM	238	31%
Gold Mount	337	33%	MG	204	31%
MG	304	33%	Business Royals	262	29%
Palace	357	32%	Gold Mount	268	28%
Park	310	21%	Richman	583	27%
President	395	27%	President	265	23%
Fest / PECT	218	7%	Park	264	20%

How much do you typically spend a week on tobacco products which have not been subject to UK taxes e.g. purchased from abroad, duty free, markets...



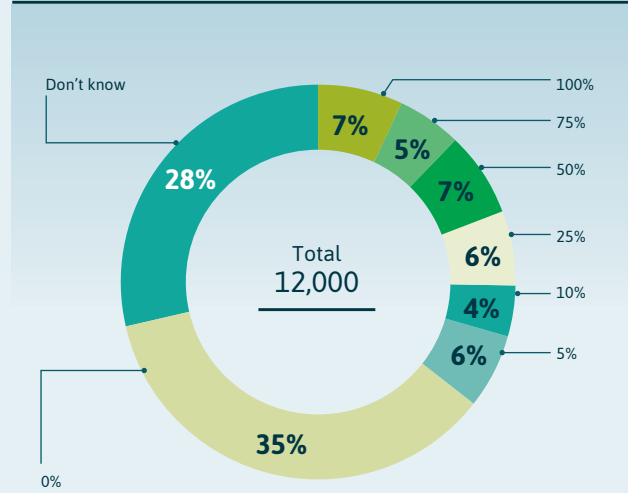
Non-UK Duty Paid Penetration

How often in the UK have you seen or been offered for sale what you believe to be UK brand cigarettes /tobacco (of the type that you see in the shops) that did not carry the marking 'UK Duty Paid'?



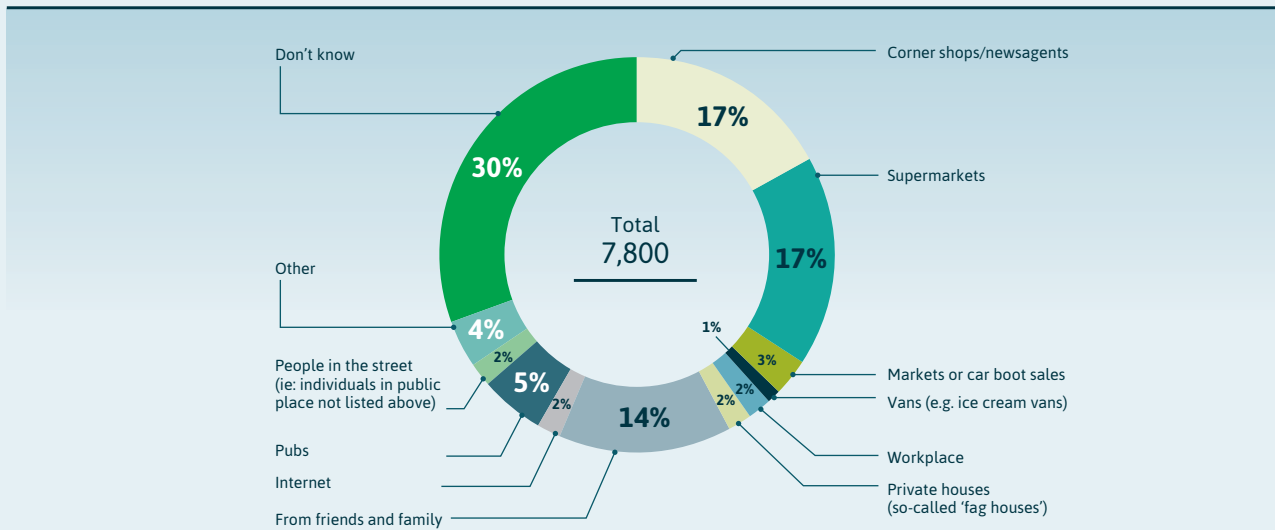
Non-UK Duty Paid Penetration

If you have purchased what you believe to be UK brand cigarettes/tobacco that did not carry the marking 'UK Duty Paid', what proportion are they of the tobacco/cigarettes you consume per day?



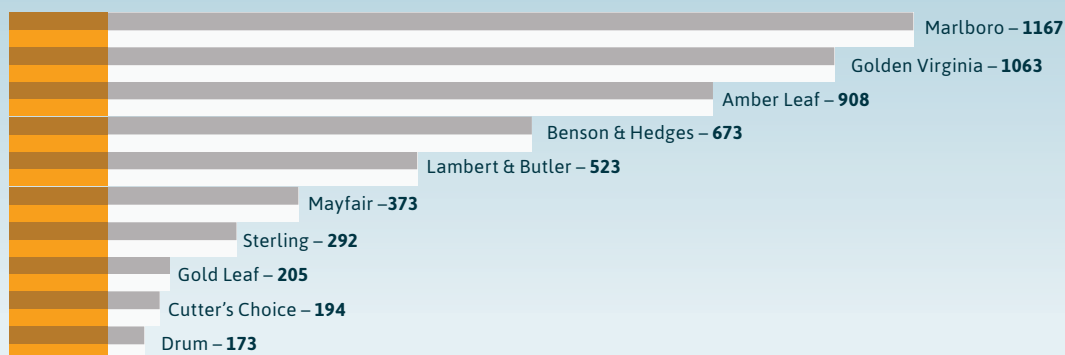
Non-UK Duty Paid Penetration

If you have purchased what you believe to be genuine UK brands that did not carry the marking 'UK Duty Paid', where/from whom did you buy them?



Please provide examples of the brands that you typically buy from 'non-shop' sources?

BASE: 8,554 | ALL INTERVIEWS | NO WEIGHTING



Awareness and Reporting

Key Information

- 1 in 5 UK smokers are aware of illicit tobacco products being sold in their area, but only 21% of them have reported this activity to the authorities in the last 12 months. This is an increase on 2015.
- Non-shop tobacco products are often sold at prices that are much lower than their legitimate counterparts. The average price for 'non-shop' cigarettes (pack of 20) in the UK is £4.11 and the average price for a pouch of Hand Rolling Tobacco (50g) is £6.88.
- 13% of smokers surveyed stated that they were aware of under-18s buying or selling illicit tobacco locally in the last year. This is an increase of 1% since the last survey in 2015.

In the UK have you ever seen or been offered what you believe to be non-UK brands?

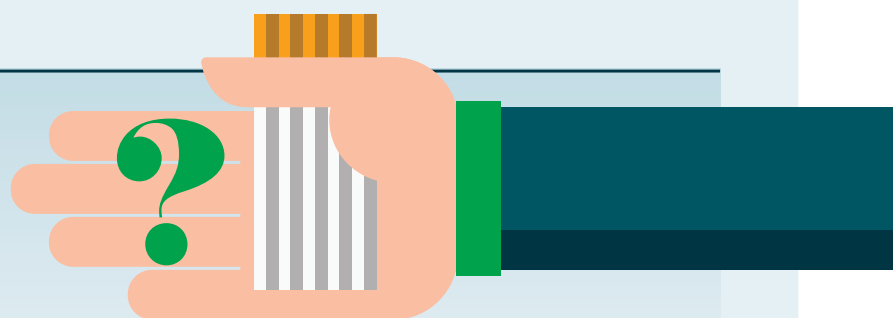
BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING

33%

Cigarette smokers answered "yes"

38%

RYO smokers answered "yes"



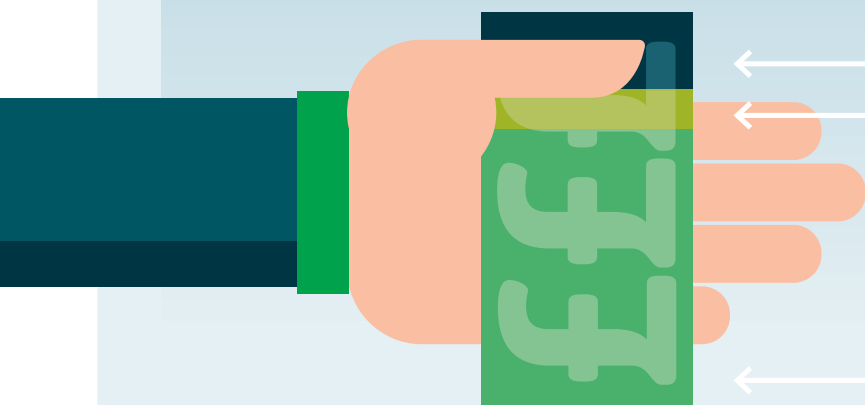
Are you aware of illicit tobacco products (UK tax has not been paid) being sold in your area?

BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING

20%
said yes

12% don't know

68% said no

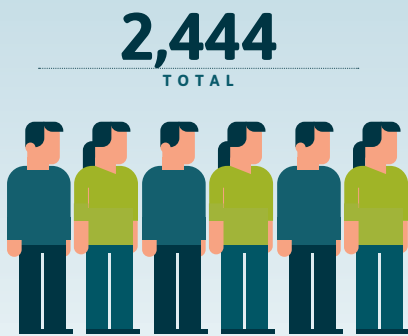


If so, where have you seen these tobacco products sold?

If so, where have you seen these tobacco products sold?	2016		2015	
	Count	Col%	Count	Col%
Corner shops/newsagents	909	37%	738	32%
Markets or car boot sales	609	25%	622	27%
Vans (e.g. ice cream vans)	285	12%	237	10%
Workplace	370	15%	345	15%
Private houses (so-called 'fag houses')	538	22%	510	22%
From friends and family	552	23%	478	21%
Internet	342	14%	285	12%
Pubs	767	31%	758	33%
People in the street (ie: individuals in public place not listed above)	500	20%	575	25%
Other	41	2%	47	2%
Don't know	105	4%	104	5%

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

BASE: 2,444 | ALL INTERVIEWS | NO WEIGHTING



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

BASE: 524 | ALL INTERVIEWS | NO WEIGHTING



POLICE



CRIMESTOPPERS



HM REVENUE & CUSTOMS



TRADING STANDARDS



LOCAL COUNCIL



THE MEDIA

3% OTHER | 5% DON'T KNOW

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

BASE: 926 | ALL INTERVIEWS | NO WEIGHTING



20%
I didn't know who to tell

18%
I was afraid to tell anyone in case I got into trouble

58%
It's none of my business

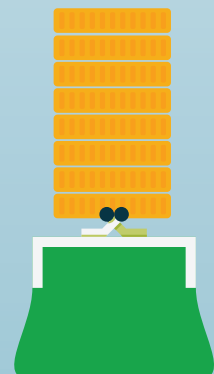
When you have seen tobacco products sold, what was the price range?

BASE: 2,444 | ALL INTERVIEWS | NO WEIGHTING

80%
of those who buy a 20 pack of non-shop cigarettes paid **less than £5**



66%
of those who buy a 50g pouch of RYO tobacco purchase it for paid **less than £8**



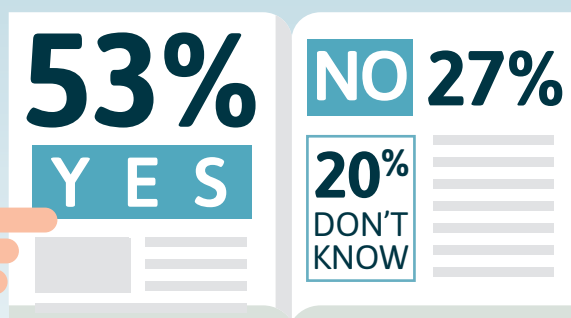
Deterrents

Key Information

- The evidence suggests that the media is an effective conduit through which to communicate information on illicit tobacco and its potential impact on smokers.
- Almost half of all smokers have no idea what restrictions there are on the amount of tobacco/number of cigarettes they can bring into the UK legally.
- Half of all smokers believe that it is ok to buy tobacco overseas and bring it back to the UK to sell to friends and family.

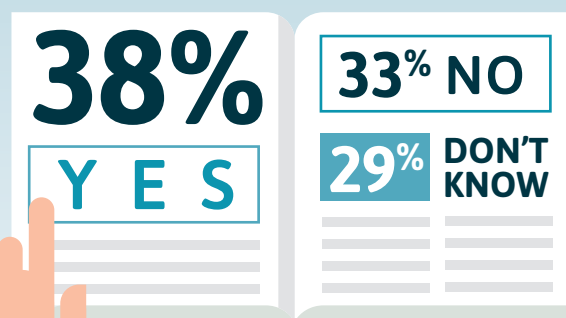
Would reading an article about the dangers of illicit tobacco in your local paper put you off buying illegal cigarettes?

BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING



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

BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING



Do you think there are sufficient deterrents to dissuade or prevent people from selling illicit tobacco products?

BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING

Do you think there are sufficient deterrents to dissuade or prevent people from selling and/or buying illicit tobacco products?			
Question	Yes	No	Don't know
Legal deterrents (e.g. high likelihood of getting caught and severe level of punishment)	33%	40%	27%
Social deterrents (e.g. people have a negative perception of using illicit tobacco)	25%	43%	27%
Media deterrents (e.g. frequent advertising campaigns or articles against illicit tobacco)	25%	49%	27%
Political deterrents (e.g. clear and direct Government action and sentiment against illicit tobacco)	25%	47%	28%
Economic deterrents (e.g. the price of legitimate tobacco products is not too high)	27%	47%	26%

Which of the following statements do you agree with:

BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING

Which of the following statements do you agree with?		
Question	Yes	No
It's ok to buy tobacco overseas and in duty free shops and bring it back to the UK to sell to my friends and family, providing I don't charge them more than I paid for it	50%	50%
I have no idea what restrictions there are on how many cigarettes/tobacco I can legally bring into the UK	47%	53%
I plan to buy tobacco products abroad and bring back as many cigarettes/tobacco as I legally can	52%	48%
I know where to find the rules to tell me how much tobacco I can bring back into the UK from aboard	60%	40%
I don't like buying cigarettes/tobacco in overseas or Duty Free shops, as I don't want too many cigarettes/ too much tobacco in my home	32%	68%

Attitudes

To what extent do you agree or disagree with each of these statements:

BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING

Question	Disagree strongly	Disagree slightly	No opinion	Agree slightly	Agree strongly
I have no objections to buying non-UK duty paid tobacco for myself as long as it is from a legal source (Duty Free or overseas shops) when I'm travelling abroad.	5%	3%	16%	21%	55%
I have no objections to buying non-UK duty paid tobacco from (friend/relative, shops, etc.)	17%	12%	28%	23%	20%
I am nervous about buying non-UK duty paid cigarettes / tobacco in case the product is counterfeit	9%	11%	25%	26%	29%
I don't buy non-UK duty paid product as I think that they taste different to UK bought cigarettes / tobacco	12%	15%	36%	18%	19%

Do you believe UK tobacco prices are?

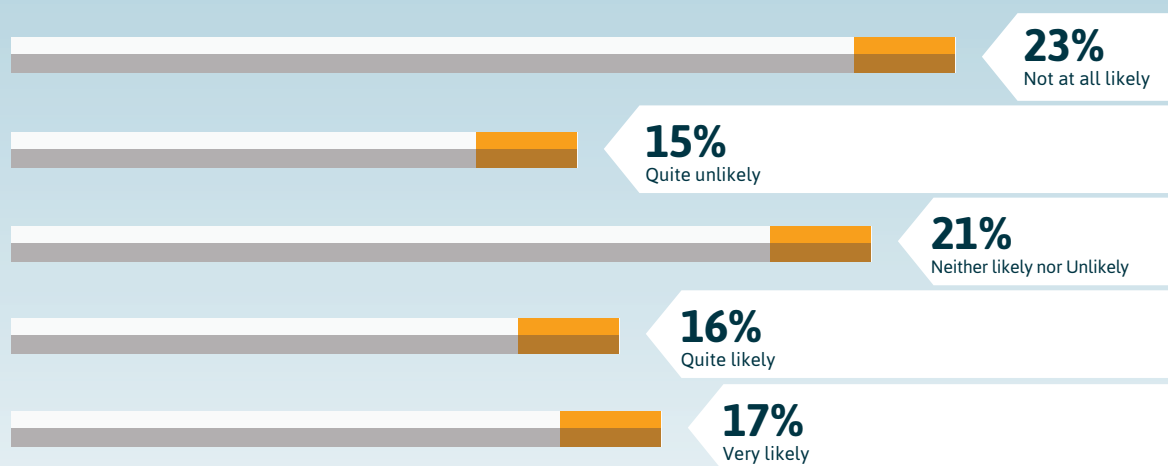
BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING



2% (211) DON'T KNOW

Looking ahead how likely are you to purchase tobacco products which have not been subject to UK taxes e.g. purchased from abroad, duty free, markets...

BASE: 12000 | ALL INTERVIEWS | NO WEIGHTING



7% (854) DON'T KNOW