

# TMA Smokers' Anti-Illicit Trade Survey 2017: Attitudes, Awareness and Understanding

In June 2017, the TMA commissioned a nationwide poll of 12,065 adult smokers to understand their awareness, behaviour and attitudes towards illicit tobacco. The questions received input from HM Revenue and Customs and other stakeholders. The 2017 results supplement those of similar surveys conducted by the TMA over the past three years and the results are compared where possible.

## Key Findings

**72.5%**

of smokers purchased tobacco from non-UK duty paid sources – a 1.5 percentage point increase from last year's findings.

**48%**

of smokers with the lowest incomes bought tobacco from illicit sources. This is the highest proportion for any income group.

**45%**

of smokers agreed that recent changes to tobacco products (such as minimum pack sizes and mandatory plain packaging) make them more likely to purchase illicit tobacco products. 31% disagreed and 24% had no opinion.

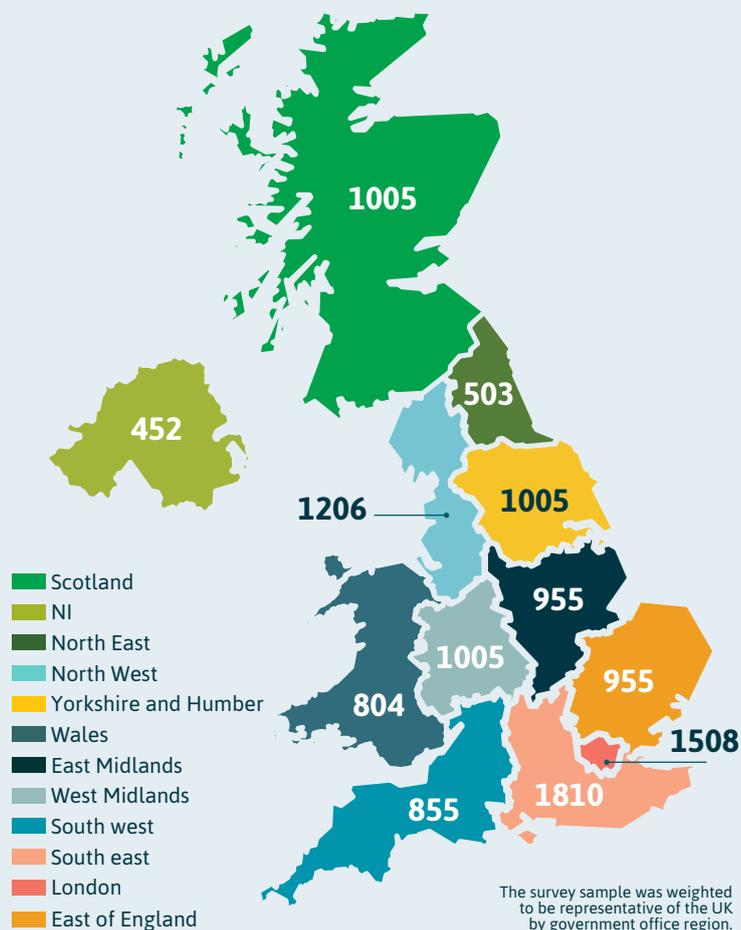
**57%**

of smokers agree that rising tobacco prices tempt them to purchase tobacco that has not been subject to UK taxes. 24% disagree and 19% have no opinion.

**12%**

of smokers who are aware of illicit tobacco in their local area have reported it to the authorities. This is a significant decline from 21% in 2016.

## Responses by region



Survey total = 12,065

The survey sample was weighted to be representative of the UK by government office region.

# Overall Purchasing Patterns

## Key Information

- Smokers in the UK continue to purchase their tobacco products through conventional retail channels with the only notable change being a 6 percentage point fall in smokers purchasing from supermarkets compared to 2016.
- 51% of smokers purchase tobacco products from abroad.
- 59% of smokers purchase tobacco products from Duty Free.

## Where do you buy your tobacco products?



Location	Whole	Percentage
Festivals / Pubs / Bars	603	5%
Markets or car boot sales	362	3%
Private houses - so-called 'fag' or 'tab' houses	362	3%
Internet - social media and/or websites advertising cheap tobacco	362	3%
Someone selling in a pub, bar or café i.e. a non-employee	362	3%
Vans	241	2%
Workplace	241	2%
People in the street - i.e. individuals in public place not listed above	241	2%
Other	121	1%
Don't know	0	0%

## How often do you buy tobacco from the following sources?

BASE: 12,065 | ALL INTERVIEWS

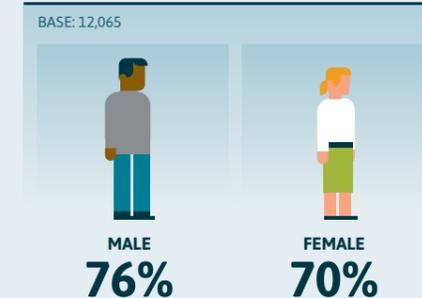
Location	Never	More than once a day	Once a day	Four or five times a week	Two or three times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Don't know
Markets or car boot sales	84%	1%	2%	1%	2%	3%	1%	1%	3%	1%
Vans	88%	1%	1%	1%	1%	2%	1%	1%	3%	1%
Workplace	85%	1%	2%	1%	1%	2%	1%	1%	4%	1%
Private houses (so-called 'fag houses')	87%	1%	1%	1%	1%	2%	1%	1%	3%	2%
From friends and family	70%	1%	1%	1%	1%	3%	2%	4%	13%	1%
Festivals / Pubs / Bars	74%	1%	1%	1%	1%	3%	2%	3%	13%	1%
Internet (social media and/or websites advertising cheap tobacco)	86%	1%	1%	1%	1%	1%	1%	2%	4%	1%
Someone selling in a pub, bar or café i.e. a non-employee	83%	1%	1%	1%	1%	2%	1%	2%	6%	1%
People in the street (i.e.: individuals in public place not listed above)	88%	1%	1%	1%	1%	2%	1%	1%	3%	2%
Abroad (in a local shop when travelling outside the UK)	49%	1%	2%	1%	2%	3%	1%	2%	35%	4%
Duty Free shop (at the airport, ferry or Eurotunnel)	41%	1%	1%	1%	1%	2%	1%	3%	44%	5%

# Non-UK Duty Paid Purchasing Patterns

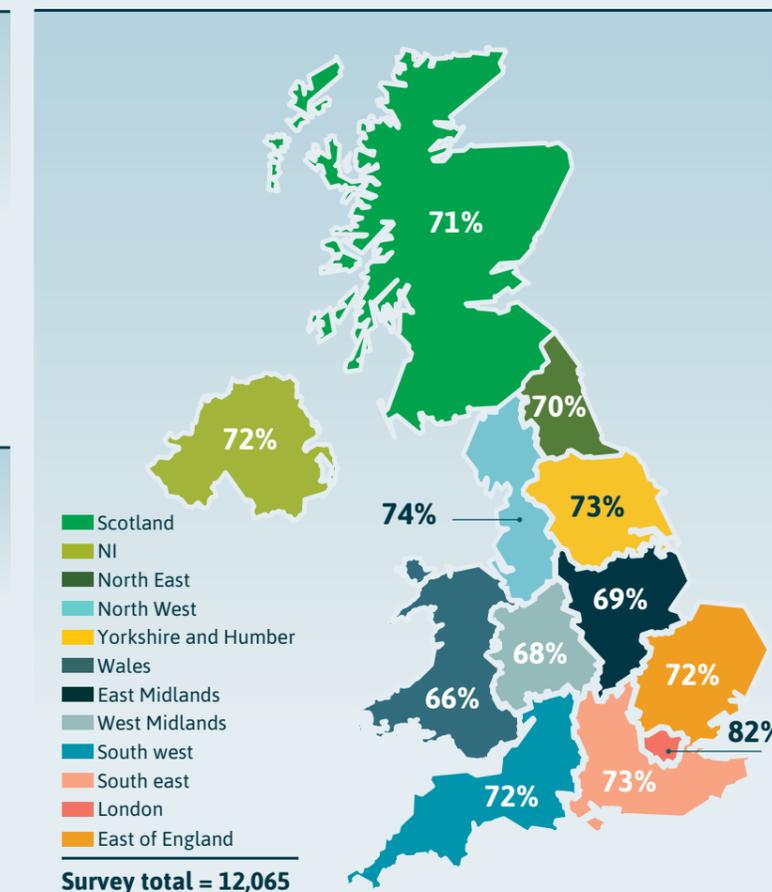
## Key Information

- Smokers in London were the most likely to buy non-UK duty paid tobacco with 82% doing so.
- Adult smokers 18-24 were the most likely to buy non-UK Duty paid tobacco with 77% doing so. Those over 75 were the least likely (57%).
- Smokers with the lowest incomes were more likely (48%) to buy tobacco from illicit sources than those with the highest incomes (40%).

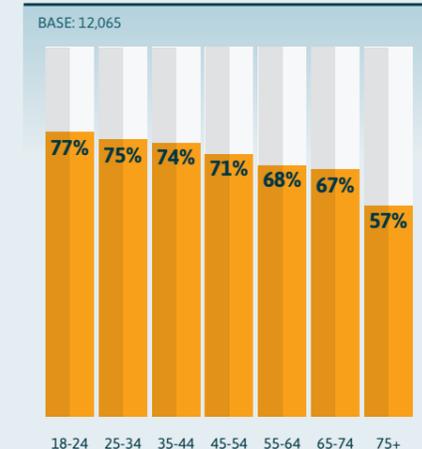
## Percentage of respondents who had bought non-UK Duty paid tobacco products by gender.



## Percentage of respondents who had bought non-UK Duty paid tobacco products by UK region.



## Percentage of respondents who had bought non-UK Duty paid tobacco products by age.



## Percentage of respondents who had bought non-UK Duty paid tobacco products excluding from abroad and at Duty Free by income.

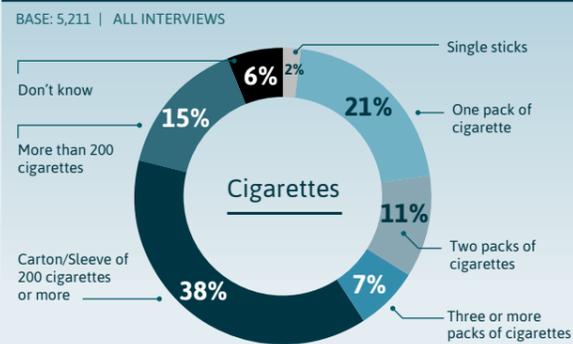


# Non-UK Duty Paid Purchasing Patterns

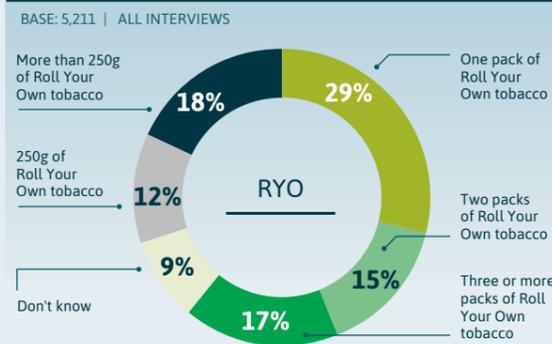
## Key Information

- 15% of cigarette smokers typically bought more than 200 cigarettes on each occasion they bought tobacco that had not been subject to UK taxes.
- The average spend per week of smokers who admit to having purchased tobacco from illicit sources is £8.46.
- 15% of cigarette smokers typically spent more than £1,000 per year on illicit tobacco per year.

On each occasion you purchase cigarettes that have not been subject to UK taxes, how much do you typically buy?



On each occasion you purchase roll your own (RYO) tobacco that has not been subject to UK taxes, how much do you typically buy?



The following brands are not typically sold in the UK. Have you seen any of the following known non-shop brands being sold or smoked?

BASE: 12,065 | ALL INTERVIEWS

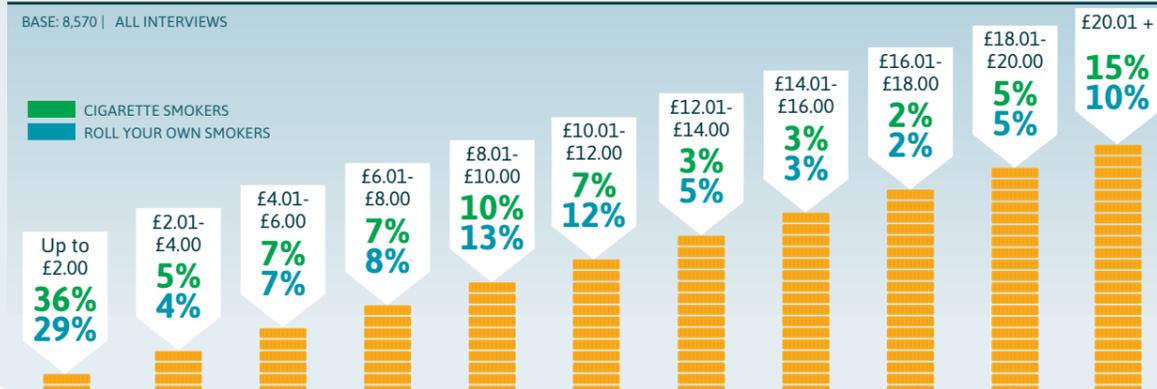
2017			
Brand	%	Brand	%
American Legend	9%	Kent	18%
Austin	5%	Kings International	11%
Business Royals	17%	L&M	46%
Domingo	14%	Minsk	8%
Eastenders	13%	NZ Black	6%
Excellence	10%	NZ Gold	6%
Fest/PECT	11%	Raquel	7%
Flandria	8%	Richman	15%
Gold Classic	26%	Septwolves	4%
Gold Mount	12%	Viceroy	13%
JIM	14%	The Turner	19%
Jin Ling	17%		

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

BASE: 8,129 | ALL INTERVIEWS

2017			
Brand	%	Brand	%
American Legend	43%	Kent	28%
Austin	42%	Kings International	24%
Business Royals	24%	L&M	36%
Domingo	29%	Minsk	32%
Eastenders	36%	NZ Black	39%
Excellence	27%	NZ Gold	39%
Fest/PECT	34%	Raquel	38%
Flandria	40%	Richman	30%
Gold Classic	33%	Septwolves	40%
Gold Mount	27%	Viceroy	29%
JIM	32%	The Turner	41%
Jin Ling	29%		

Excluding tobacco purchased from abroad and at Duty Free, how much do you typically spend a week on tobacco products which you know have not been subject to UK taxes? e.g. cheap purchases in a pub or cheap purchases online.



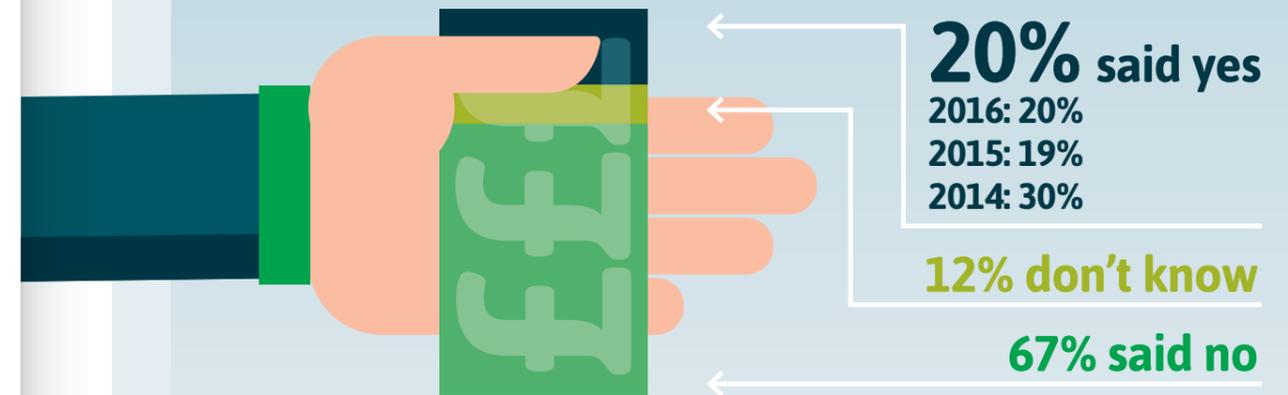
# Awareness

## Key Information

- 20% of smokers are aware of illicit tobacco being sold in their local area. This is the same percentage as 2016.
- 49% of cigarette smokers who are aware of illicit tobacco in their area have seen it being sold for what is typically less than half the price of UK duty paid cigarettes (less than £4).
- 45% of smokers have seen 50g packs of RYO tobacco for more than £8. This is an 11 percentage point increase from 2016.

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

BASE: 12,065 | ALL INTERVIEWS



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

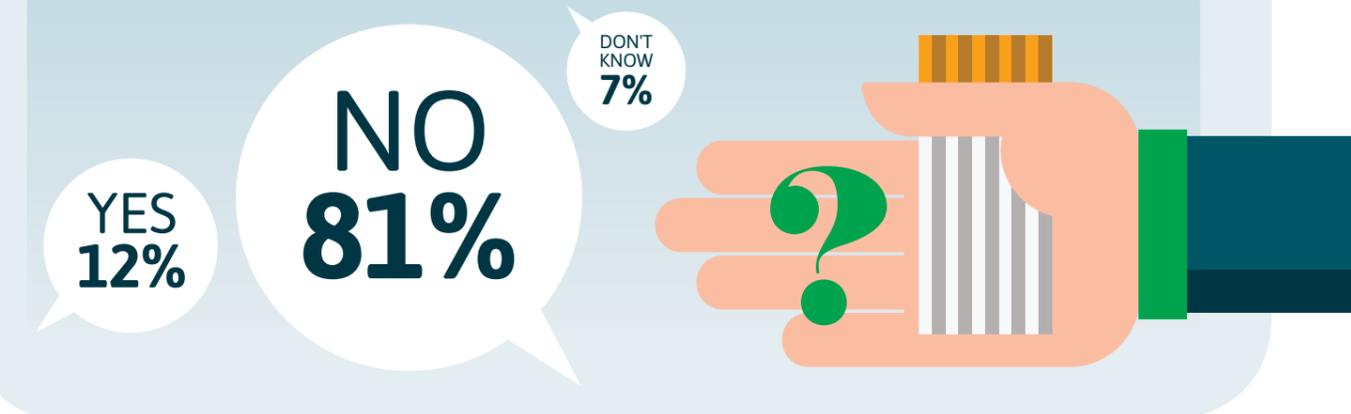
	2014	2015	2016	2017
	%	%	%	%
£3.00 or Less	19%	21%	18%	12%
£3.01 to £4.00	45%	43%	32%	37%
£4.01 to £5.00	21%	23%	29%	28%
£5.01 to £6.00	9%	8%	12%	15%
£6.00 or More	6%	5%	8%	8%

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

	2014	2015	2016	2017
	%	%	%	%
£5.00 or Less	18%	16%	18%	12%
£5.01 to £6.00	16%	16%	14%	12%
£6.01 to £7.00	18%	14%	14%	12%
£7.01 to £8.00	28%	24%	20%	18%
£8.00 or More	20%	29%	34%	45%

Within the last year, are you aware of any under 18s buying or selling illicit tobacco locally?

BASE: 12,065 | ALL INTERVIEWS



# Reporting

## Key Information

- Only 12% of smokers who are aware of illicit tobacco in their local area have reported it to the authorities. This is a decrease on 21% from 2016.
- The Police was the most common authority to whom illicit tobacco was reported (38%) and the proportion of smokers reporting illicit tobacco to HMRC has increased by 13 percentage points since 2014.
- 64% of smokers who did not report illicit tobacco didn't do so because it was 'none of their business'. This is a 7 percentage point increase from 2016.
- 56% of smokers would be more likely to report illicit tobacco if it were known that it is unregulated and can contain ingredients such as rat droppings.

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

BASE: 2,473 | ALL INTERVIEWS



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

BASE: 2,176 | ALL INTERVIEWS



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

BASE: 298 | ALL INTERVIEWS



To what extent would the following reasons make you more likely or less likely to report illicit tobacco?

BASE: 1,610 | MAY NOT ADD UP TO 100% DUE TO ROUNDING

	All likely	Neither likely or unlikely	All unlikely
The government lost £2.4 billion in tax from illicit tobacco last year	20%	34%	45%
Illicit tobacco products are unregulated and may contain ingredients such as rat droppings	56%	25%	20%
Illicit tobacco products do not have the required fire safety features that legitimate ones do	43%	31%	26%
It is much easier for children to access illicit tobacco as criminals do not ask for ID	48%	28%	24%
The people who profit from illegal tobacco are usually part of organised criminal gangs	42%	30%	28%
That illegal tobacco risks putting your local corner shop or newsagent shop out of business	34%	35%	32%
The reassurance that a report couldn't be traced to you	42%	32%	25%
The person/s that I am reporting would be prosecuted	35%	35%	30%

# Deterrents

## Key Information

- Only 24% of smokers think there are sufficient deterrents to persuade people not to buy illicit tobacco.
- 61% of smokers agreed that the punishments for the sale of illicit tobacco should be strengthened by introducing rising fines for repeat offenders.
- Reading an article about the dangers of illicit tobacco would put slightly fewer smokers off purchasing it than in previous years

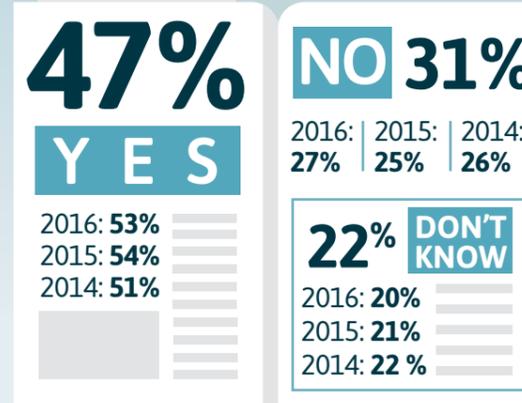
Do you think there are sufficient deterrents - e.g. legal, social, etc. to dissuade or prevent people from selling and/or buying illicit tobacco products?

BASE: 12,065 | ALL INTERVIEWS



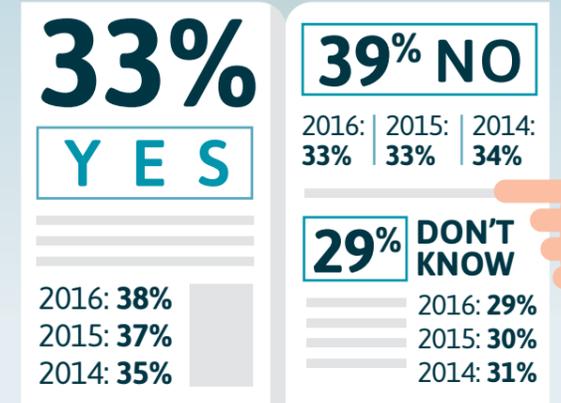
Would reading an article about the dangers of illicit tobacco in your local paper put you off buying illegal cigarettes?

BASE: 12,065 | ALL INTERVIEWS



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: 12,065 | ALL INTERVIEWS



Do you agree or disagree that the government should do the following to reduce the illicit trade in tobacco products?

BASE: 12,065 | ALL INTERVIEWS

Question	Total agree	I have no opinion on this	Total disagree
Rising financial penalties for repeat offenders - e.g. doubling for second offence, tripling for third etc.	61%	26%	12%
On the spot fines for those selling illegal tobacco	65%	22%	13%
Make it easier to name and shame people or companies that illegally evade tobacco tax	60%	26%	14%
Make landowners and landlords more responsible for illegal goods sold on their premises	52%	26%	21%
Make social media websites more responsible for illegal tobacco when it is promoted or sold via their platforms	61%	26%	13%
Encourage landlords to evict tenants who sell illegal tobacco	43%	31%	26%

# Attitudes

## Key Information

- 45% of smokers agree that the recent regulatory changes to tobacco packs make them more likely to purchase tobacco that hasn't been subject to UK taxes.
- 57% of smokers agree that rising tobacco prices tempt them to purchase tobacco that has not been subject to UK taxes.
- 88% of smokers believe that tobacco prices are too high. This is an increase from the 84% of smokers who thought this in 2016.

## What did people say when asked why they did not report illicit tobacco that they were aware of in their area?

**"If government [sic] want to keep rising the cost people will seek cheaper alternatives."**  
Married, Male, £30,000-£39,999, Northern Ireland, 6-10 cigarettes per day



**"I buy [illicit tobacco] and don't want it to stop as I can't afford duty paid."**  
Unmarried, Female, £6,001-£9,999, South West, 11-15 cigarettes per day



**"I feel [the illicit market] is inevitable due to the recent changes in tobacco legislation. People can't always afford to buy a 30 or 50g pouch, so illegal tobacco sales seem more attractive."**  
Married, Female, £6,001-£9,999, East Midlands, 11-15 cigarettes per day



**"The government forces me to buy a large quantity of tobacco, I prefer to buy the smaller packs that stay fresher and encourage me to smoke less. I will buy the large pouches of untaxed tobacco as I am unable to buy the product I wish to and pay tax on it."**  
Married, Female, £20,000-29,999, South East, 6-10 cigarettes per day

**"[The Government has] no one to blame [for illicit tobacco sales] but themselves for changing packs and prices."**  
Married, Female, £30,000-£39,999, North East, 11-15 cigarettes per day



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

BASE: 12,065 | ALL INTERVIEWS

Question	Agree strongly	Agree slightly	I have no opinion on this	Disagree slightly	Disagree strongly
Rising tobacco prices tempt me to purchase tobacco that has not been subject to UK taxes	28%	29%	19%	8%	16%
Recent changes to tobacco product sizes or packaging have made me more likely to purchase tobacco that has not been subject to UK taxes	21%	24%	24%	12%	19%
I have no objections to buying tobacco that has not been subject to UK taxes for myself as long as it is from a legal source	43%	26%	17%	5%	8%
I have no objections to buying tobacco that has not been subject to UK taxes from - friend/relative, shops, etc.	21%	25%	24%	13%	16%
I am nervous about buying tobacco that has not been subject to UK taxes in case the product is counterfeit	27%	28%	23%	12%	10%
I don't buy tobacco that has not been subject to UK taxes product as I think that they taste different to UK bought cigarettes / tobacco	17%	20%	32%	18%	13%

## Which of the following statements do you agree with?

BASE: 12,065 | ALL INTERVIEWS

Question	Cigarettes		Roll Your Own tobacco	
	Yes	No	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.	49%	51%	52%	48%
I don't know what restrictions there are on how many cigarettes / tobacco I can legally bring into the UK.	49%	51%	56%	44%
I plan to buy tobacco products abroad and bring back as many cigarettes / tobacco as I legally can.	52%	48%	48%	52%
I know where to find the rules to tell me how much tobacco I can bring back into the UK from aboard.	63%	37%	59%	41%
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.	31%	69%	31%	69%

## Do you believe UK tobacco prices are?

