

TMA Smokers' Anti-Illicit Trade Survey 2017: Scotland

Awareness, Behaviours and Attitudes

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. In Scotland, 1,107 smokers were surveyed. The 2016 results supplement those of similar surveys conducted by the TMA in 2016, 2015 and 2014 and the results are compared where possible.

Key Findings

70.6%

of Scottish smokers buy non-UK duty paid tobacco products – slightly less than the 72.5% UK average.

43%

of Scottish smokers agree that recent regulatory changes to tobacco products make them more likely to buy from the illicit market which is a similar proportion to the UK average (45%).

38.5%

of Scottish smokers buy tobacco from illicit sources which is slightly lower than the UK average.

56%

of Scottish smokers with incomes of less than £6,000 have bought tobacco from illicit sources which is much higher than the UK average (48%).

Survey respondents



The survey sample is representative of the Scottish population by government office region.

Overall Purchasing Patterns

Key Information

- Scottish smokers are more likely to buy tobacco from corner shops and newsagents (73%) than in the whole of the UK (69%).
- 56% of Scottish smokers buy tobacco from Duty Free which is lower than the UK average (59%).
- The same proportion of Scottish smokers buy tobacco from abroad as the UK average (51%).

Where do you buy your tobacco products?



Location	Scotland %	UK %
Corner shops/newsagents	73%	69%
Supermarkets (including online delivery)	75%	73%
Markets or car boot sales	3%	3%
Vans	3%	2%
Workplace	2%	2%
Private houses (so-called 'fag' or 'tab' houses)	2%	3%
From friends and family	6%	9%
Festivals / Pubs / Bars	5%	5%
Internet (social media and/or websites advertising cheap tobacco)	2%	3%
Someone selling in a pub, bar or café i.e. a non-employee	3%	3%
People in the street (i.e. individuals in public place not listed above)	1%	2%
Abroad (in a local shop when travelling outside the UK)	17%	15%
Duty Free (at the airport, ferry or Eurotunnel)	16%	17%
Other	0%	1%
Don't know	0%	0%

How often do you buy tobacco from the following sources?

BASE: 1,107 | ALL INTERVIEWS

Location	Never	More than once a week	Up to once a month	Less than once a month	Don't know
Markets or car boot sales	86%	6%	4%	3%	1%
Vans	81%	4%	5%	8%	1%
Workplace	87%	4%	3%	4%	2%
Private houses (so-called 'fag' or 'tab' houses)	89%	3%	4%	2%	2%
From friends and family	78%	4%	7%	10%	2%
Festivals / Pubs / Bars	75%	3%	7%	13%	2%
Internet (social media and/or websites advertising cheap tobacco)	89%	2%	4%	4%	2%
Someone selling in a pub, bar or café i.e. a non-employee	86%	3%	4%	5%	2%
People in the street (i.e. individuals in public place not listed above)	89%	2%	3%	4%	2%
Abroad (in a local shop when travelling outside the UK)	49%	5%	5%	36%	4%
Duty Free (at the airport, ferry or Eurotunnel)	44%	3%	4%	44%	5%

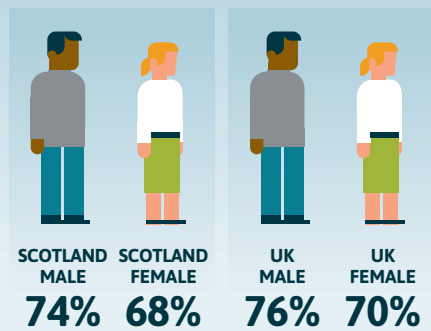
Non-UK Duty Paid Purchasing Patterns

Key Information

- 56% of Scottish smokers with incomes of less than £6,000 have bought tobacco from illicit sources which is much higher than the UK average (48%).
- Scottish smokers over the age of 75 are much more likely (71%) to buy non-UK duty paid tobacco than the UK average (57%).
- 74% of Scottish men and 68% of Scottish women buy non-UK duty paid tobacco, similar levels to smokers in the rest of the UK.

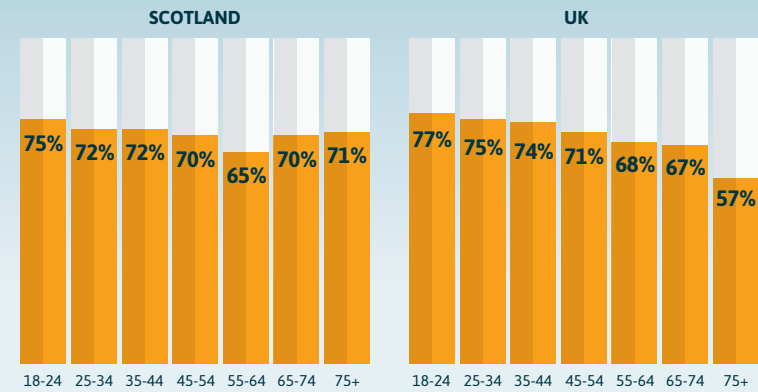
Percentage of respondents who had bought non-UK duty paid tobacco products by gender.

BASE: SCOTLAND 1,107 | UK 12,065



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

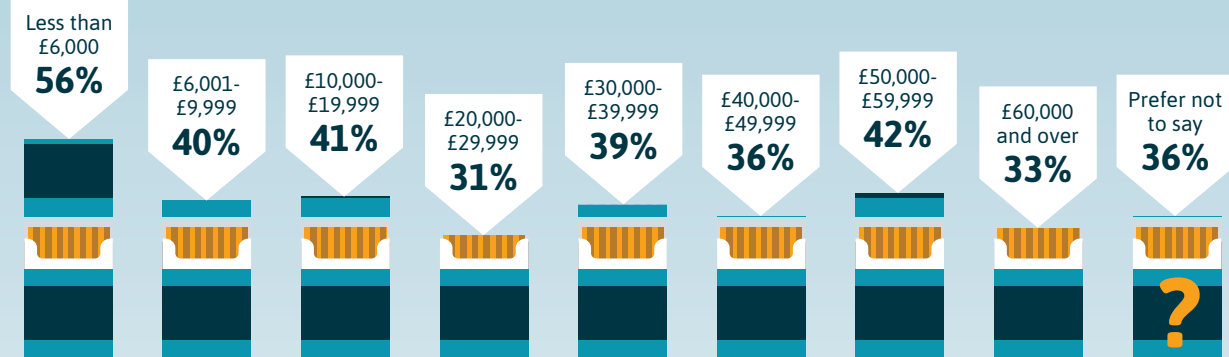
BASE: SCOTLAND 1,107 | UK 12,065



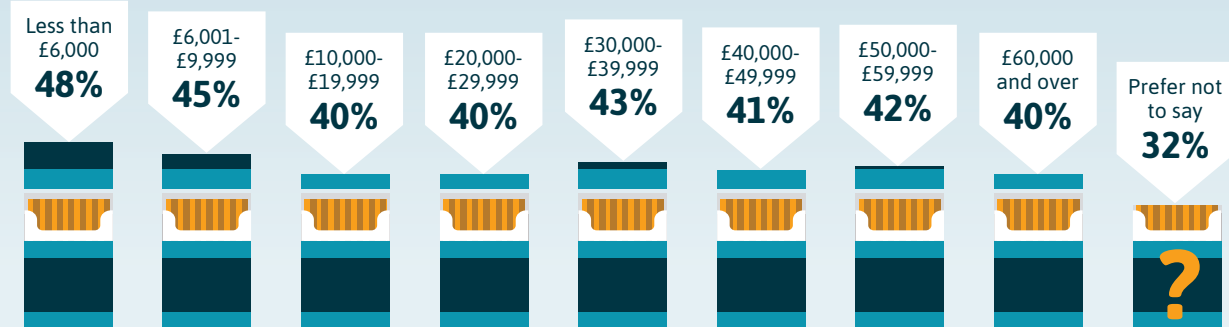
Percentage of respondents who had bought non-UK duty paid tobacco products excluding from abroad and at Duty Free by income.

BASE: SCOTLAND 1,107 | UK 12,065

Scotland



UK

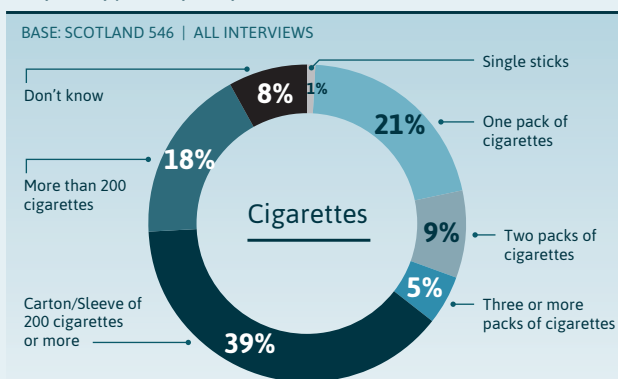


Non-UK Duty Paid Purchasing Patterns

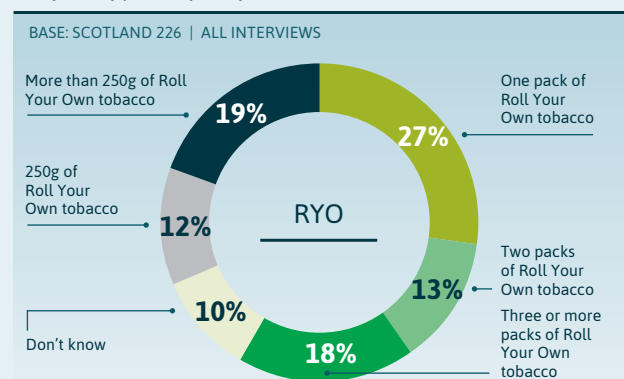
Key Information

- The average spend per week on illicit tobacco by Scottish smokers is £8.31 which is slightly lower than the UK average (£8.41).
- Scottish smokers have similar exposure to the most common non-domestic cigarette brands as the whole of the UK.
- 57% of Scottish smokers typically purchase 200 cigarettes or more when they buy non-UK duty paid tobacco – more than the UK average of 53%.

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



On each occasion, you purchase 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: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS

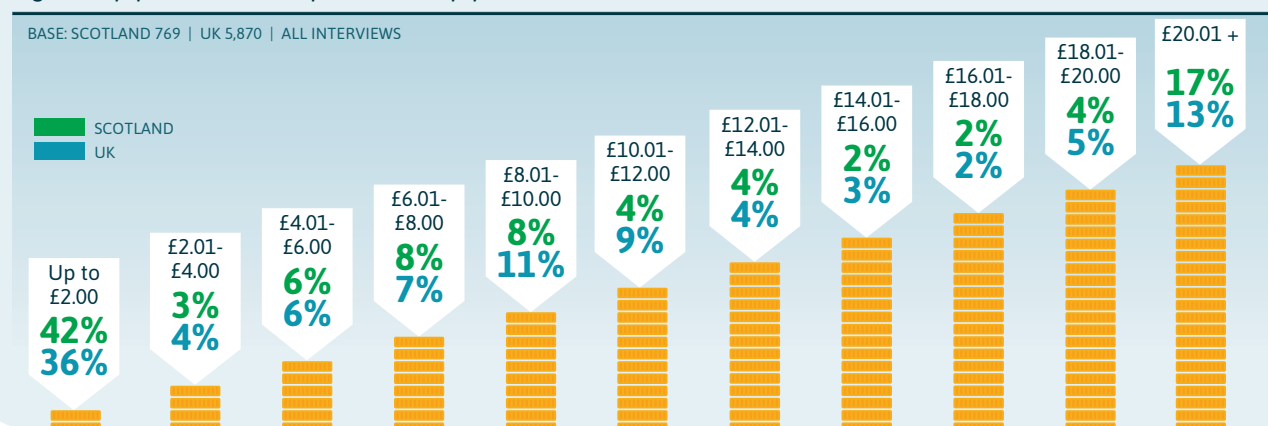
2017					
Brand	Scotland %	UK %	Brand	Scotland %	UK %
American Legend	7%	9%	Kent	17%	18%
Austin	4%	5%	Kings International	11%	11%
Business Royals	15%	17%	L&M	45%	46%
Domingo	13%	14%	Minsk	6%	8%
Eastenders	8%	13%	NZ Black	4%	6%
Excellence	8%	10%	NZ Gold	3%	6%
Fest/PECT	7%	11%	Raquel	5%	7%
Flandria	11%	8%	Richman	11%	15%
Gold Classic	25%	26%	Septwolves	3%	4%
Gold Mount	10%	12%	Viceroy	12%	13%
JIM	13%	14%	The Turner	13%	19%
Jin Ling	11%	17%			

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

BASE: UK 8,129 | ALL INTERVIEWS

2017					
Brand	Scotland %	UK %	Brand	Scotland %	UK %
American Legend	43%	43%	Kent	28%	28%
Austin	49%	42%	Kings International	26%	24%
Business Royals	22%	24%	L&M	37%	36%
Domingo	27%	29%	Minsk	35%	32%
Eastenders	31%	36%	NZ Black	34%	39%
Excellence	24%	27%	NZ Gold	48%	39%
Fest/PECT	19%	34%	Raquel	50%	38%
Flandria	35%	40%	Richman	27%	30%
Gold Classic	33%	33%	Septwolves	47%	40%
Gold Mount	18%	27%	Viceroy	29%	29%
JIM	29%	32%	The Turner	29%	41%
Jin Ling	31%	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

- Fewer Scottish smokers (17%) are aware of illicit tobacco in their local area than the UK average (20%).
- 30% of Scottish smokers who are aware of illicit tobacco have seen 50g roll your own tobacco sold for less than £6 which is higher than the UK average (24%).
- 42% of Scottish smokers who are aware of illicit tobacco have seen packs of 20 cigarettes sold for between £4 and £5 which is higher than the UK average (24%).

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

BASE: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS



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

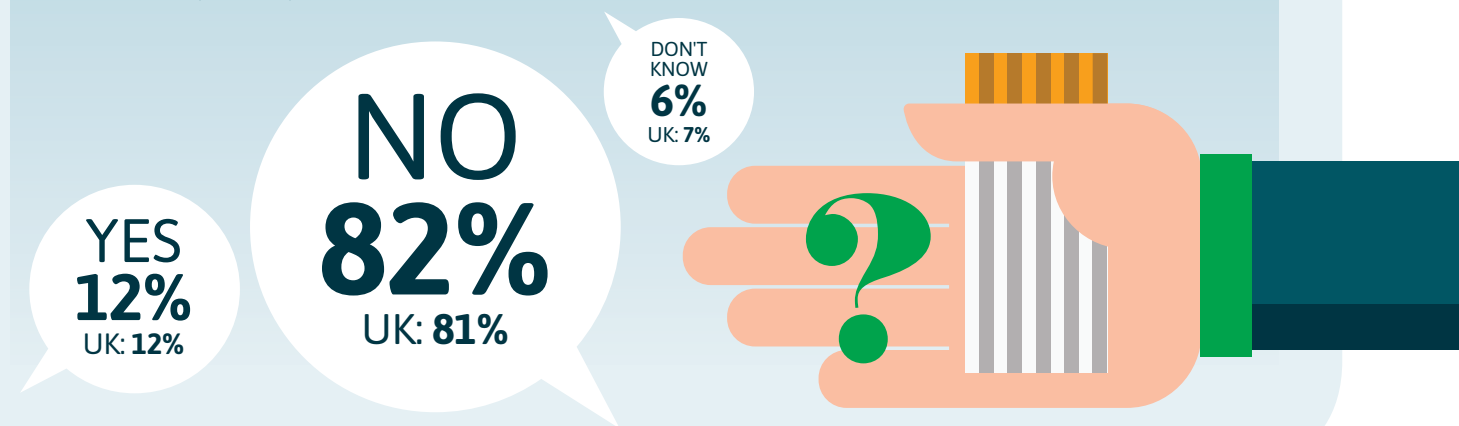
	Scotland	UK
	%	%
£3.00 or Less	12%	12%
£3.01 to £4.00	22%	37%
£4.01 to £5.00	42%	28%
£5.01 to £6.00	12%	15%
£6.01 or More	13%	8%

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

	Scotland	UK
	%	%
£5.00 or Less	17%	12%
£5.01 to £6.00	13%	12%
£6.01 to £7.00	15%	12%
£7.01 to £8.00	16%	18%
£8.01 or More	40%	45%

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

BASE: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS



Reporting

Key Information

- 11% of Scottish smokers who had seen illicit tobacco in their area reported it to the authorities which is a similar level to the whole UK (12%).
- 56% of Scottish smokers would be more likely to report illicit tobacco if they knew it was unregulated and may contain ingredients such as rat droppings which is the same as the UK average.
- 70% of Scottish smokers did not report the sale of illicit tobacco as they thought that it was none of their business which is slightly higher than the UK average (64%).

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

BASE: SCOTLAND 191 | UK 2,473 | ALL INTERVIEWS



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

BASE: SCOTLAND 170 | UK 2,176 | ALL INTERVIEWS

9% (UK: 13%)

I was afraid to tell anyone in case I got in trouble

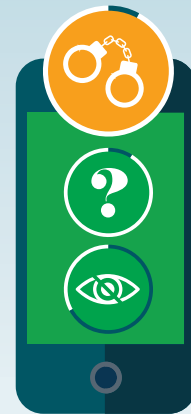
9% (UK: 15%)

I didn't know who to tell

70% (UK: 64%)

It's none of my business

Other: **11%**
Don't know: **5%**



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

BASE: SCOTLAND 21 | UK 298 | ALL INTERVIEWS



5% DON'T KNOW | 0% OTHER

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

BASE: 131 | MAY NOT ADD UP TO 100% DUE TO ROUNDING

Reason	Very likely	Quite likely	Neither likely nor Unlikely	Quite unlikely	Not at all likely
The government lost £2.4 billion in tax from illicit tobacco last year	5%	16%	34%	16%	29%
Illicit tobacco products are unregulated and may contain ingredients such as rat droppings	26%	31%	22%	8%	13%
Illicit tobacco products do not have the required fire safety features that legitimate ones do	22%	27%	26%	11%	15%
It is much easier for children to access illicit tobacco as criminals do not ask for ID	28%	26%	24%	10%	11%
The people who profit from illegal tobacco are usually part of organised criminal gangs	24%	24%	26%	13%	13%
That illegal tobacco risks putting your local corner shop or newsagent shop out of business	15%	23%	32%	14%	16%
The reassurance that a report couldn't be traced to you	18%	23%	34%	11%	15%
The person/s that I am reporting would be prosecuted	17%	18%	31%	18%	17%

Deterrents

Key Information

- Scottish smokers have similar views on deterrents to the illicit trade as the whole of the UK with just 25% thinking that they are sufficient.
- Around one in three Scottish smokers would be more likely to report illicit tobacco if they read about its dangers in their local media which is similar to the UK average.
- 64% of Scottish smokers thought that the Government should introduce rising fines for repeat offences relating to illicit tobacco which is slightly higher than the UK average (61%).

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: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS



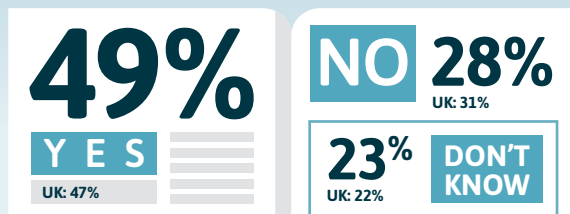
Do you think any of the following are sufficient deterrents to dissuade or prevent people from selling and/or buying illicit tobacco products?

BASE: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS

	Yes	No	Don't Know
Legal deterrents – e.g. high likelihood of getting caught and severe level of punishment	46%	34%	19%
Social deterrents – e.g. people have a negative perception of using illicit tobacco	31%	51%	18%
Media deterrents – e.g. frequent advertising campaigns or articles against illicit tobacco	31%	50%	19%
Political deterrents – e.g. clear and direct Government action and sentiment against illicit tobacco	34%	46%	20%
Economic deterrents – e.g. the price of legitimate tobacco products is not too high	41%	41%	18%

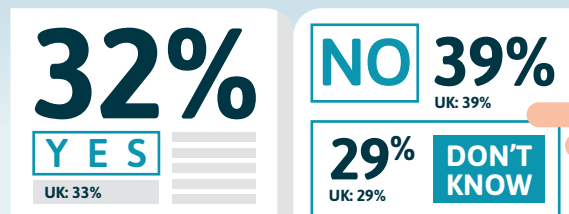
Would reading an article about the dangers of illicit tobacco in your local media put you off buying illegal cigarettes??

BASE: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS



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

BASE: SCOTLAND 1,107 | UK 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: SCOTLAND 1,107 | ALL INTERVIEWS

Question	I agree strongly	I agree slightly	I have no opinion on this	I disagree slightly	I disagree strongly
Rising financial penalties for repeat offenders – e.g. doubling for second offence, tripling for third etc.	33%	31%	27%	5%	4%
On the spot fines for those selling illegal tobacco	36%	30%	23%	7%	4%
Make it easier to name and shame people or companies that illegally evade tobacco tax	35%	26%	28%	6%	5%
Make landowners and landlords more responsible for illegal goods sold on their premises	28%	26%	27%	11%	7%
Make social media websites more responsible for illegal tobacco when it is promoted or sold via their platforms	34%	26%	28%	7%	5%
Encourage landlords to evict tenants who sell illegal tobacco	22%	21%	33%	12%	12%

Attitudes

Key Information

- 90% of Scottish smokers think that tobacco prices are too high, this is 2 percentage points higher than the UK average.
- 53% of Scottish smokers agree that rising tobacco prices tempt them to purchase untaxed tobacco which is slightly lower than the UK average (57%).
- 43% of Scottish smokers agree that recent regulatory changes to tobacco products (such as plain packaging and the banning of small packs) make them more likely to buy from the illicit market which is slightly lower than the UK average (45%).

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

BASE: 1,107 | ALL INTERVIEWS

Question	Disagree strongly	Disagree slightly	I have no opinion on this	Agree slightly	Agree strongly
Rising tobacco prices tempt me to purchase tobacco that has not been subject to UK taxes	17%	9%	21%	28%	25%
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%	12%	24%	24%	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 – Duty Free or overseas shops when I'm travelling abroad	8%	6%	15%	25%	46%
I have no objections to buying tobacco that has not been subject to UK taxes from – friend/relative, shops, etc.	17%	17%	24%	24%	18%
I am nervous about buying tobacco that has not been subject to UK taxes in case the product is counterfeit	10%	11%	21%	30%	28%
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	11%	17%	33%	21%	18%

Which of the following statements do you agree with?

BASE: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS

	Scotland		UK	
	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.	45%	55%	48%	52%
I don't know what restrictions there are on how many cigarettes / tobacco I can legally bring into the UK.	50%	50%	51%	49%
I plan to buy tobacco products abroad and bring back as many cigarettes / tobacco as I legally can.	49%	51%	49%	51%
I know where to find the rules to tell me how much tobacco I can bring back into the UK from abroad.	59%	41%	61%	39%
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.	29%	71%	31%	69%

Do you believe UK tobacco prices are?

BASE: SCOTLAND 1,107 | UK 12,065 | ALL INTERVIEWS

