

TMA Smokers' Anti-Illicit Trade Survey 2017: Wales

Awareness, Behaviours and Attitudes

In June 2017, the TMA commissioned a nationwide poll of 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 Wales, 694 smokers were surveyed. The 2017 results supplement those of similar surveys conducted by the TMA in 2016, 2015 and 2014 and the results for Wales are compared to the whole UK findings where appropriate.

Key Findings

65.6%

of Welsh smokers purchase tobacco from non-UK duty paid sources. This is lower than the finding for the whole UK which was 72.5%.

20%

of smokers are aware of illicit tobacco products being sold in their local area.

13%

of Welsh smokers spend more than £20 per week on illicit tobacco which is higher than the UK average of 10%.

The average price seen for a pack of 20 illicit cigarettes in Wales is £3.91 which is lower than the UK average of £4.20.

Survey respondents



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

Overall Purchasing Patterns

Key Information

- Fewer Welsh smokers bought tobacco abroad (12%) and at Duty Free (14%) than the UK average (15%, 17%).
- 27% of Welsh smokers bought tobacco from friends and family at least once a year.
- 13% of Welsh smokers bought tobacco from an individual selling in the pub who wasn't an employee at least once a year.

Where do you buy your tobacco products?



Location	Wales %	UK %
Corner shops/newsagents	69%	69%
Supermarkets (including online delivery)	76%	73%
Markets or car boot sales	2%	3%
Vans	1%	2%
Workplace	2%	2%
Private houses – so-called 'fag' or 'tab' houses	Neg	3%
From friends and family	8%	9%
Festivals / Pubs / Bars	4%	5%
Internet (social media and/or websites advertising cheap tobacco)	1%	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)	12%	15%
Duty Free (at the airport, ferry or Eurotunnel)	14%	17%
Other	1%	1%
Don't know	0%	0%

How often do you buy tobacco from the following sources?

BASE: 694 | 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	89%	1%	2%	1%	1%	3%	0%	1%	2%	1%
Vans	91%	0%	1%	1%	1%	1%	1%	1%	3%	1%
Workplace	90%	0%	2%	1%	0%	1%	0%	1%	3%	2%
Private houses (so-called 'fag' or 'tab' houses)	92%	1%	1%	0%	0%	2%	1%	1%	2%	1%
From friends and family	73%	1%	1%	1%	1%	3%	2%	4%	13%	1%
Festivals / Pubs / Bars	78%	1%	1%	1%	1%	3%	2%	2%	11%	1%
Internet (social media and/or websites advertising cheap tobacco)	90%	1%	1%	1%	1%	1%	1%	2%	4%	1%
Someone selling in a pub, bar or café i.e. a non-employee	87%	1%	1%	0%	0%	1%	1%	3%	5%	0%
People in the street (i.e.: individuals in public place not listed above)	92%	1%	1%	0%	1%	1%	1%	1%	3%	1%
Abroad (in a local shop when travelling outside the UK)	58%	1%	2%	1%	1%	2%	1%	2%	30%	3%
Duty Free shop (at the airport, ferry or Eurotunnel)	50%	1%	1%	0%	0%	1%	0%	3%	39%	3%

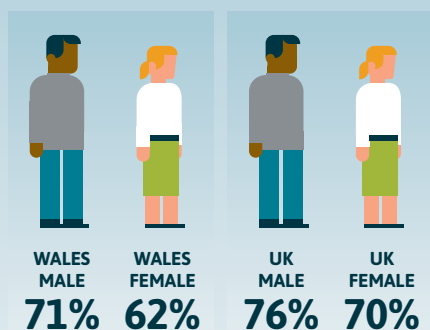
Non-UK Duty Paid Purchasing Patterns

Key Information

- Fewer Welsh men (71%) and women (62%) bought non-UK duty paid tobacco than the UK averages (76%, 70%).
- The purchase of tobacco from illicit sources by those with incomes of less than £6,000 was lower in Wales (42%) than the UK average (48%).
- More Welsh smokers aged 65-74 purchase non-UK duty paid tobacco (76%) than the UK average (67%).

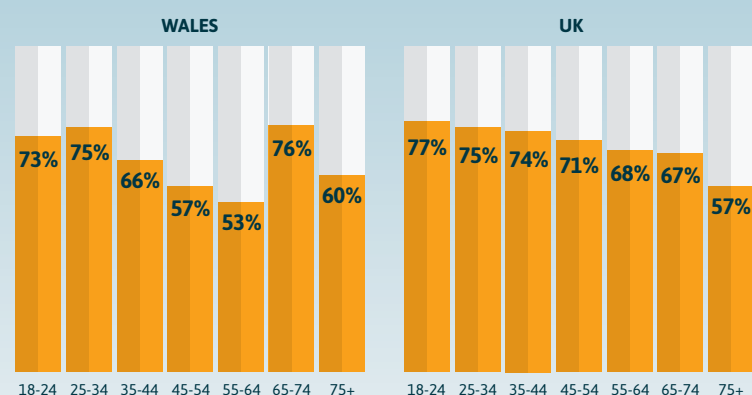
Percentage of respondents who had bought non-UK Duty paid tobacco products by gender.

BASE: WALES 694 | UK 12,065



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

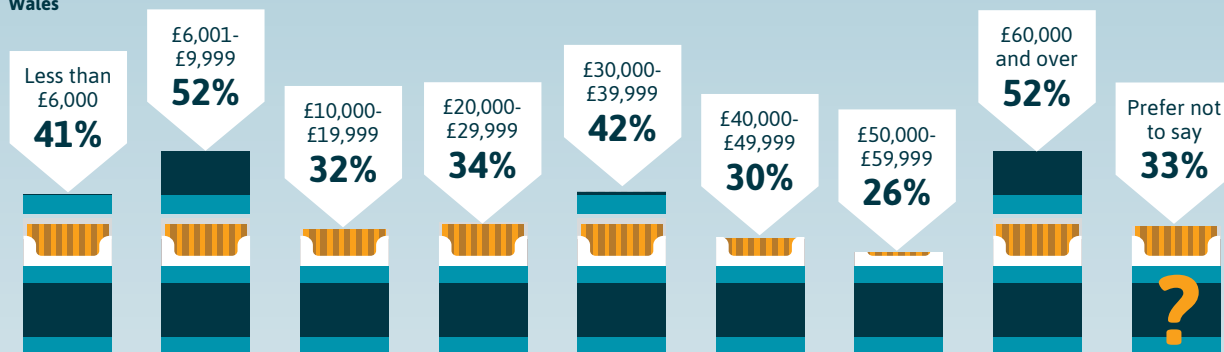
BASE: WALES 694 | UK 12,065



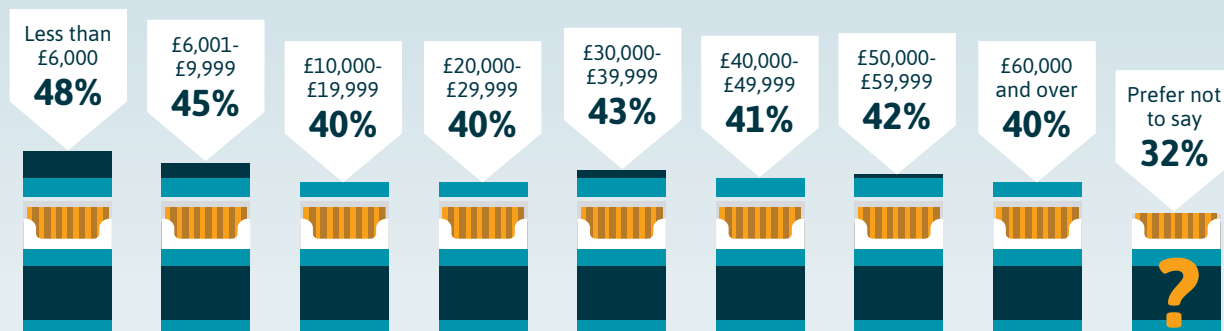
Percentage of respondents who had bought non-UK Duty paid tobacco products excluding from abroad and at Duty Free by income.

BASE: WALES 694 | UK 12,065

Wales



UK

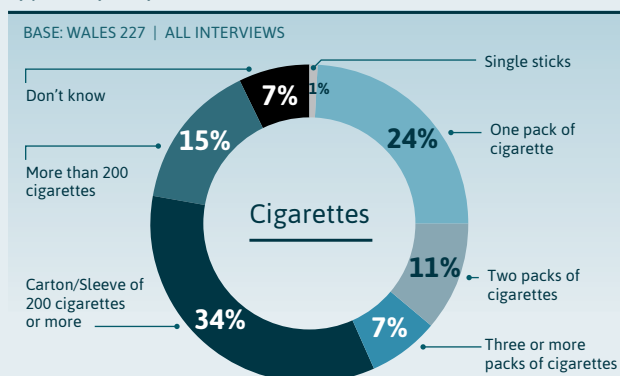


Non-UK Duty Paid Purchasing Patterns

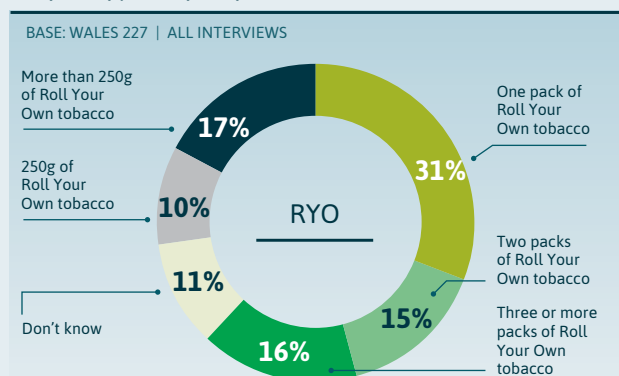
Key Information

- 49% of Welsh smokers typically bought 200 or more cigarettes each time they bought non-UK duty paid tobacco – lower than the UK average (53%).
- 27% of Welsh smokers typically bought 250g or more roll your own (RYO) tobacco each time they bought non-UK duty paid tobacco – lower than the UK average (30%).
- 13% of Welsh smokers typically spend more than £20 per week on illicit tobacco – higher than the UK average of 10%.

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



On each occasion you purchase 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: WALES 694 | UK 12,065 | ALL INTERVIEWS

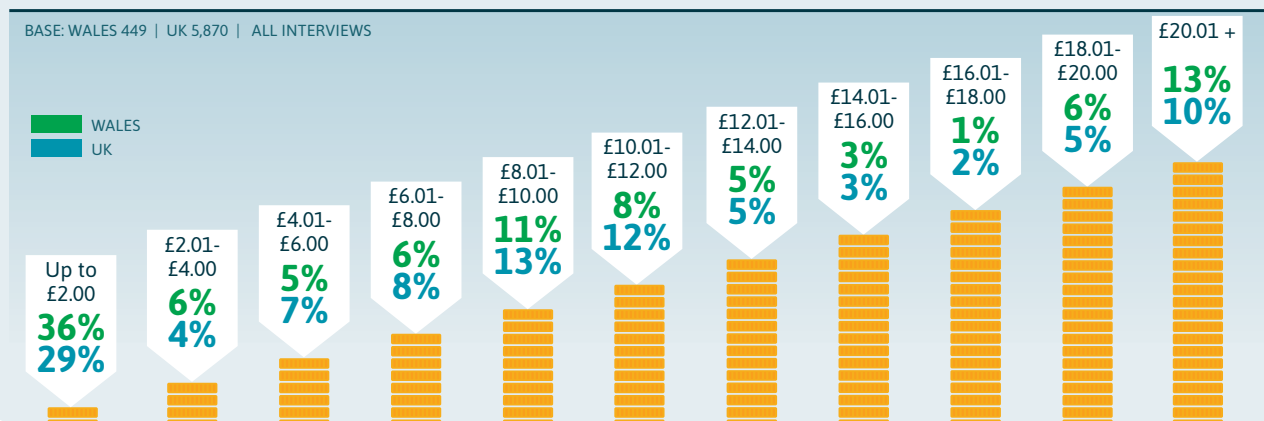
2017					
Brand	Wales %	UK %	Brand	Wales %	UK %
American Legend	8%	9%	Kent	12%	18%
Austin	3%	5%	Kings International	10%	11%
Business Royals	17%	17%	L&M	42%	46%
Domingo	14%	14%	Minsk	5%	8%
Eastenders	17%	13%	NZ Black	5%	6%
Excellence	7%	10%	NZ Gold	4%	6%
Fest/PECT	8%	11%	Raquel	8%	7%
Flandria	7%	8%	Richman	19%	15%
Gold Classic	25%	26%	Septwolves	3%	4%
Gold Mount	11%	12%	Viceroy	10%	13%
JIM	11%	14%	The Turner	10%	19%
Jin Ling	15%	17%			

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

BASE: WALES 694 | UK 12,065 | ALL INTERVIEWS

2017					
Brand	Wales %	UK %	Brand	Wales %	UK %
American Legend	40%	43%	Kent	21%	28%
Austin	38%	42%	Kings International	18%	24%
Business Royals	18%	24%	L&M	30%	36%
Domingo	35%	29%	Minsk	26%	32%
Eastenders	38%	36%	NZ Black	38%	39%
Excellence	29%	27%	NZ Gold	25%	39%
Fest/PECT	42%	34%	Raquel	34%	38%
Flandria	33%	40%	Richman	26%	30%
Gold Classic	30%	33%	Septwolves	33%	40%
Gold Mount	19%	27%	Viceroy	23%	29%
JIM	17%	32%	The Turner	31%	41%
Jin Ling	23%	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.



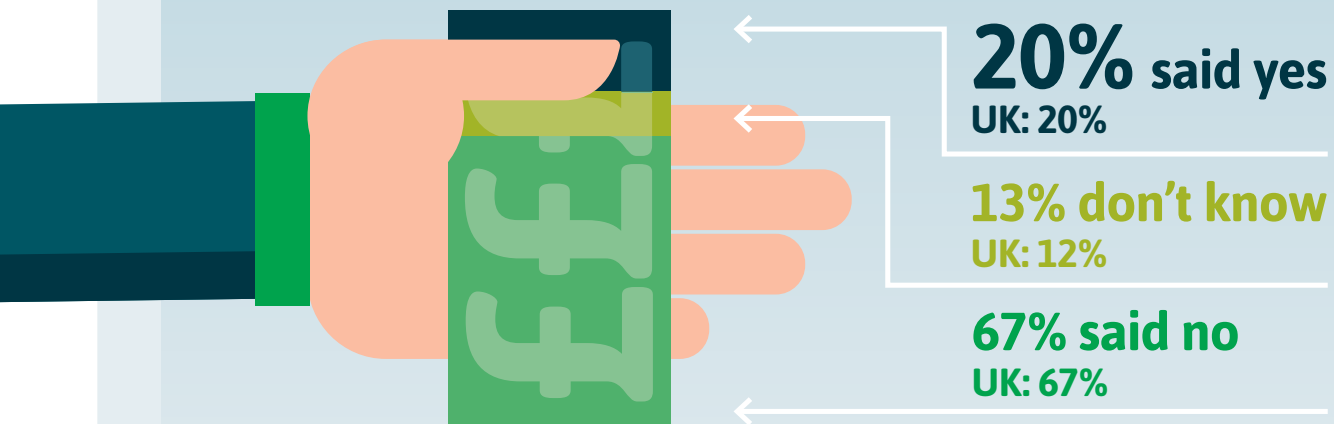
Awareness

Key Information

- The same proportion of Welsh smokers are aware of illicit tobacco products being sold in their area (20%) as the UK average.
- The average price seen for a pack of 20 illicit cigarettes in Wales is £3.91 which is lower than the UK average of £4.20.
- Fewer Welsh smokers (10%) are aware of under 18s buying or selling illicit tobacco than the UK average (12%).

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

BASE: WALES 694 | UK 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?

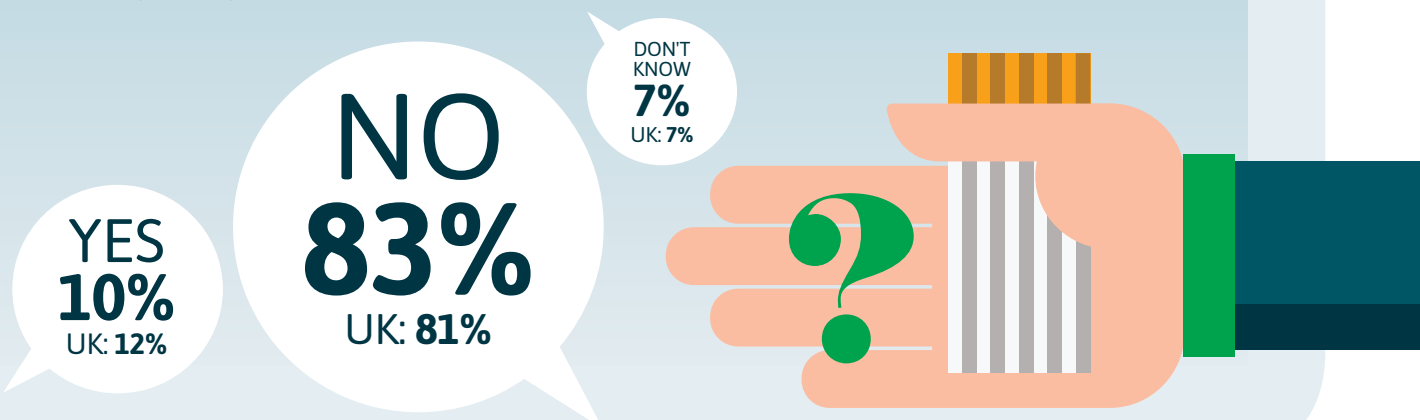
	Wales	UK
	%	%
£3.00 or Less	13%	12%
£3.01 to £4.00	44%	37%
£4.01 to £5.00	35%	28%
£5.01 to £6.00	5%	15%
£6.01 or More	3%	8%

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

	Wales	UK
	%	%
£5.00 or Less	12%	12%
£5.01 to £6.00	13%	12%
£6.01 to £7.00	14%	12%
£7.01 to £8.00	22%	18%
£8.01 or More	39%	45%

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

BASE: WALES 694 | UK 12,065 | ALL INTERVIEWS



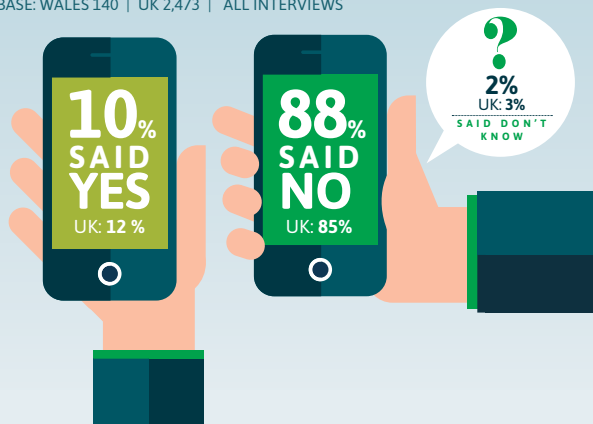
Reporting

Key Information

- Fewer smokers who have seen illicit tobacco reported it to the authorities in Wales (10%) than the UK average (12%).
- Welsh smokers most often reported illicit tobacco to HMRC and the Police (both 43%).
- 64% of smokers who didn't report illicit tobacco did so because it was 'none of their business' which is the same as the UK average.

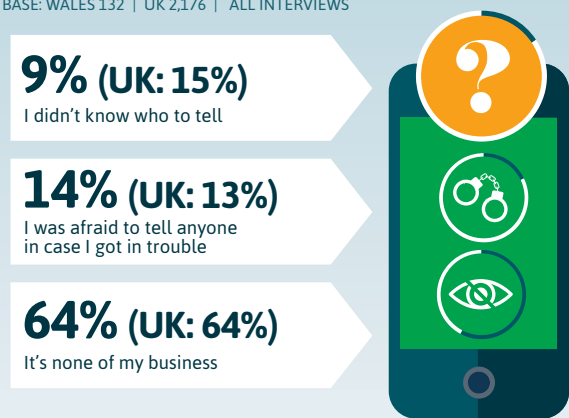
Have you reported the sale of these illicit tobacco products to anyone in the past 12 months?

BASE: WALES 140 | UK 2,473 | ALL INTERVIEWS



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

BASE: WALES 132 | UK 2,176 | ALL INTERVIEWS



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

BASE: WALES 21 | UK 298 | ALL INTERVIEWS



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

BASE: 694 | MAY NOT ADD UP TO 100% DUE TO ROUNDING

Reason	All likely	Neither likely or unlikely	All unlikely
The government lost £2.4 billion in tax from illicit tobacco last year	22%	30%	48%
Illicit tobacco products are unregulated and may contain ingredients such as rat droppings	53%	26%	21%
Illicit tobacco products do not have the required fire safety features that legitimate ones do	48%	29%	23%
It is much easier for children to access illicit tobacco as criminals do not ask for ID	45%	23%	32%
The people who profit from illegal tobacco are usually part of organised criminal gangs	40%	26%	34%
That illegal tobacco risks putting your local corner shop or newsagent shop out of business	37%	30%	33%
The reassurance that a report couldn't be traced to you	46%	26%	28%
The person/s that I am reporting would be prosecuted	33%	29%	38%

Deterrents

Key Information

- 23% of Welsh smokers consider there to be sufficient deterrents to buying or selling illicit tobacco – a similar proportion as the UK average (24%).
- Welsh smokers (30%) are less likely to be encouraged to report illicit tobacco by reading about its dangers in the local media compared to the UK average (33%)
- 63% of Welsh smokers agree the Government should introduce on the spot fines for those selling illegal tobacco.

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: WALES 694 | UK 12,065 | ALL INTERVIEWS



YES
23%
UK: 24%

NO
45%
UK: 47%

DON'T KNOW
32%
UK: 29%

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

BASE: WALES 694 | UK 12,065 | ALL INTERVIEWS

48%

YES

UK: 47%

NO **29%**

UK: 31%

23% **DON'T KNOW**

UK: 22%

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: WALES 694 | UK 12,065 | ALL INTERVIEWS

30%

YES

UK: 33%

39% NO

UK: 39%

32% **DON'T KNOW**

UK: 29%

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

BASE: WALES 694 | ALL INTERVIEWS

Question	Agree strongly	Agree slightly	I have no opinion on this	Disagree slightly	Disagree strongly
Rising financial penalties for repeat offenders – e.g. doubling for second offence, tripling for third etc.	30%	31%	25%	7%	7%
On the spot fines for those selling illegal tobacco	34%	29%	22%	9%	7%
Make it easier to name and shame people or companies that illegally evade tobacco tax	35%	24%	26%	9%	6%
Make landowners and landlords more responsible for illegal goods sold on their premises	26%	24%	27%	15%	9%
Make social media websites more responsible for illegal tobacco when it is promoted or sold via their platforms	30%	30%	24%	8%	7%
Encourage landlords to evict tenants who sell illegal tobacco	21%	19%	31%	12%	16%

Attitudes

Key Information

- 46% of Welsh smokers agree that recent regulatory changes to tobacco packaging makes them more likely to buy untaxed tobacco. This is similar to the whole UK finding (45%).
- 88% of Welsh smokers think that tobacco prices are too high which is the same as the UK average.
- 46% of Welsh smokers plan to bring back as many tobacco products from abroad as possible which is lower than the UK average (49%).

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

BASE: 694 | 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	18%	6%	19%	28%	29%
Recent changes to tobacco product sizes or packaging have made me more likely to purchase tobacco that has not been subject to UK taxes	20%	11%	23%	25%	21%
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	10%	6%	18%	27%	39%
I have no objections to buying tobacco that has not been subject to UK taxes from – friend/relative, shops, etc.	17%	12%	22%	27%	22%
I am nervous about buying tobacco that has not been subject to UK taxes in case the product is counterfeit	9%	12%	21%	31%	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	12%	17%	29%	22%	20%

Which of the following statements do you agree with?

BASE: WALES 694 | UK 12,065 | ALL INTERVIEWS

Question	Wales		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.	50%	50%	48%	52%
I don't know what restrictions there are on how many cigarettes / tobacco I can legally bring into the UK.	56%	44%	51%	49%
I plan to buy tobacco products abroad and bring back as many cigarettes / tobacco as I legally can.	46%	54%	49%	51%
I know where to find the rules to tell me how much tobacco I can bring back into the UK from abroad.	56%	44%	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.	32%	68%	31%	69%

Do you believe UK tobacco prices are?

