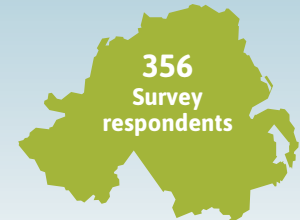


# TMA Smokers' Anti-Illicit Trade Survey: Northern Ireland Awareness, Behaviours and Attitudes 2017

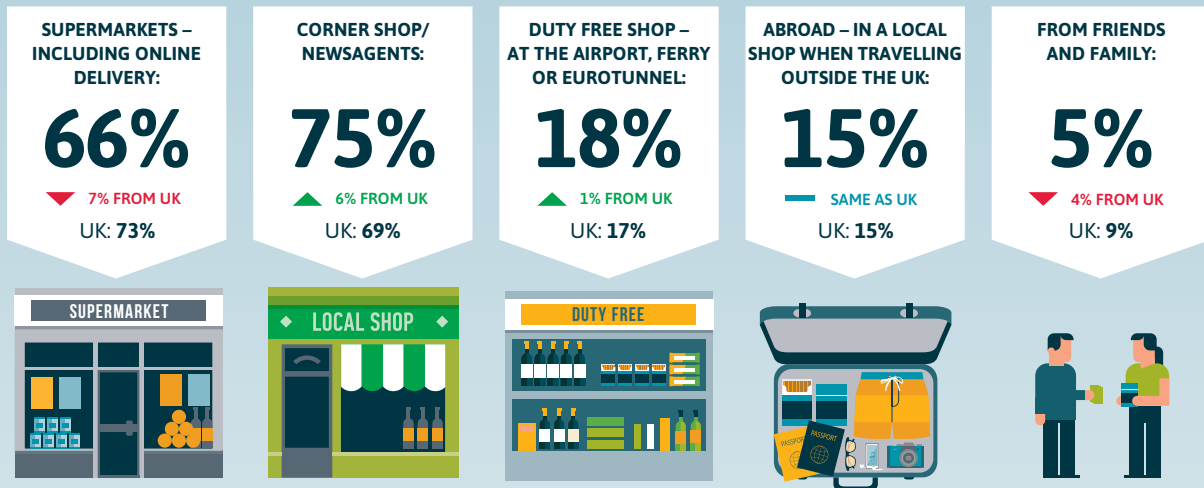
## Overall Purchasing Patterns

### Key Information

- In June 2017, the TMA commissioned a nationwide survey of adult smokers. These questions received input from HMRC.
- Northern Irish smokers buy most of their tobacco from locations such as corner shops and supermarkets which is typical of UK smokers.
- 51% and 57% of Northern Irish smokers buy tobacco from abroad and Duty Free respectively.



### Where do you buy your tobacco products?



Location	NI %	UK %
Markets or car boot sales	2%	3%
Vans	2%	2%
Workplace	1%	2%
Private houses (so-called 'fag' or 'tab' houses)	3%	3%
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%
Don't know	1%	0%

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

BASE: NI 356 | ALL INTERVIEWS

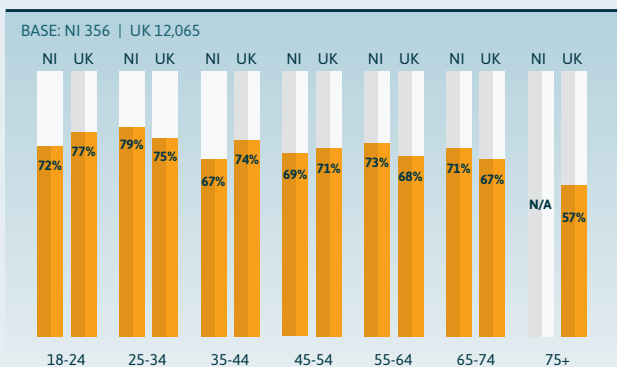
Location	Never	More than once a week	Up to once a month	Less than once a month	Don't know
Markets or car boot sales	84%	6%	4%	5%	2%
Vans	88%	3%	2%	5%	2%
Workplace	90%	5%	1%	3%	1%
Private houses (so-called 'fag' or 'tab' houses)	89%	4%	4%	2%	1%
From friends and family	79%	3%	9%	7%	1%
Festivals/Pubs/Bars	72%	3%	8%	17%	1%
Internet (social media and/or websites advertising cheap tobacco)	90%	3%	3%	3%	1%
Someone selling in a pub, bar or café i.e. a non-employee	85%	2%	4%	6%	2%
People in the street (i.e. individuals in public place not listed above)	88%	2%	3%	4%	3%
Abroad (in a local shop when travelling outside the UK)	49%	6%	4%	37%	4%
Duty Free (at the airport, ferry or Eurotunnel)	43%	2%	4%	45%	6%

# Non-UK Duty Paid Purchasing Patterns

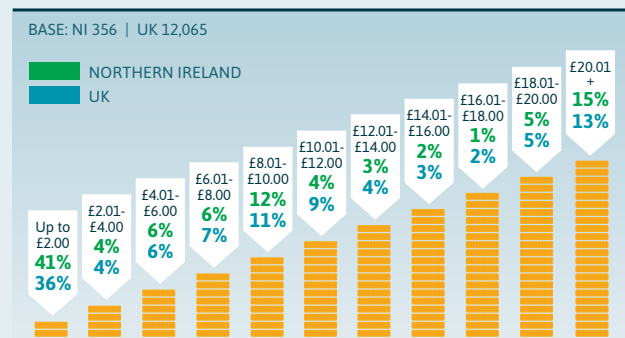
## Key Information

- 71.6% of Northern Irish smokers purchase non-UK duty paid tobacco which is similar to the UK national average (72.5%).
- 61% of Northern Irish smokers with incomes of less than £6,000 had bought tobacco from illicit sources which is much higher than the UK average (48%).
- 51% of Northern Irish smokers have seen L&M cigarettes, a brand not typically sold in the UK.

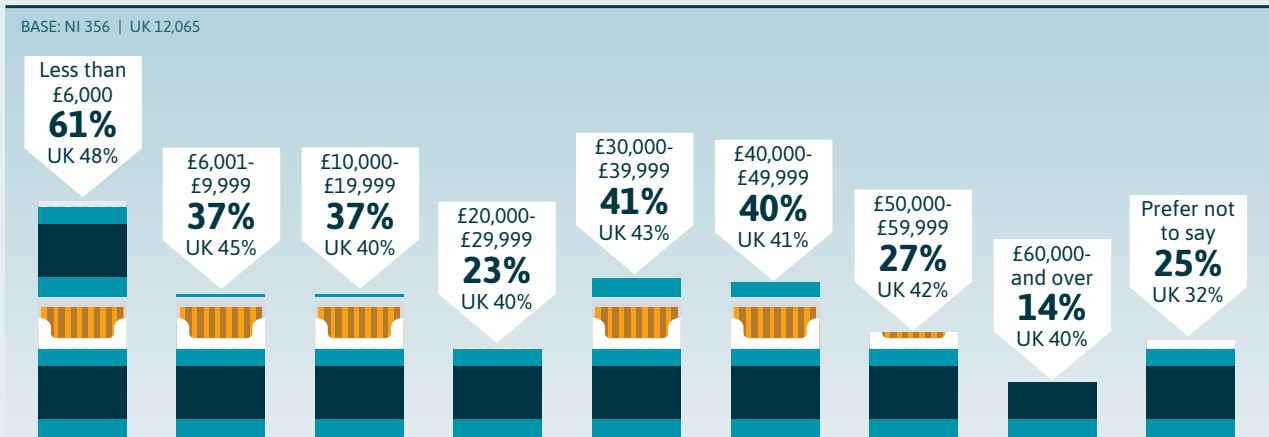
Percentage of respondents who had bought non-UK duty paid tobacco products by age.



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.



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



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: NI 356 | UK 12,065

2017					
Brand	NI %	UK %	Brand	NI %	UK %
American Legend	6%	8%	Kent	12%	12%
Austin	3%	3%	Kings International	12%	10%
Business Royals	15%	17%	L&M	51%	42%
Domingo	14%	14%	Minsk	4%	5%
Eastenders	15%	17%	NZ Black	3%	5%
Excellence	22%	7%	NZ Gold	3%	4%
Fest / PECT	4%	8%	Raquel	20%	8%
Flandria	32%	7%	Richman	21%	19%
Gold Classic	39%	25%	Septwolves	3%	3%
Gold Mount	8%	11%	Viceroy	10%	10%
JIM	21%	11%	The Turner	6%	10%
Jin Ling	28%	15%			

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

BASE: NI 356 | UK 12,065

2017					
Brand	NI %	UK %	Brand	NI %	UK %
American Legend	33%	40%	Kent	27%	21%
Austin	33%	38%	Kings International	14%	18%
Business Royals	17%	18%	L&M	36%	30%
Domingo	29%	35%	Minsk	31%	26%
Eastenders	37%	38%	NZ Black	73%	38%
Excellence	28%	29%	NZ Gold	36%	25%
Fest / PECT	13%	42%	Raquel	40%	34%
Flandria	51%	33%	Richman	22%	26%
Gold Classic	35%	30%	Septwolves	33%	33%
Gold Mount	21%	19%	Viceroy	35%	23%
JIM	37%	17%	The Turner	32%	31%
Jin Ling	30%	23%			

# Awareness and Reporting

## Key Information

- 25% of Northern Irish smokers are aware of illicit tobacco products in their local area, which is higher than the UK average (20%).
- 3% of Northern Irish smokers who are aware of illicit tobacco have reported it to the authorities which is much lower than the UK national average (12%).
- Of the Northern Irish smokers who are aware of illicit tobacco but did not report it, 55% did so because it was "none of their business".

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

BASE: NI 356 | UK 12,065



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

	NI	UK
	%	%
£3.00 or Less	4%	12%
£3.01 to £4.00	61%	37%
£4.01 to £5.00	12%	28%
£5.01 to £6.00	19%	15%
£6.01 or More	4%	8%

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

	NI	UK
	%	%
£5.00 or Less	13%	12%
£5.01 to £6.00	13%	12%
£6.01 to £7.00	0%	12%
£7.01 to £8.00	26%	18%
£8.01 or More	48%	45%

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

BASE: NI 88 | UK 2,473



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

BASE: NI 85 | UK 2,176

**13% (UK: 15%)**

I didn't know who to tell

**13% (UK: 13%)**

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

**55% (UK: 64%)**

It's none of my business

Other: 15%

Don't know: 5%



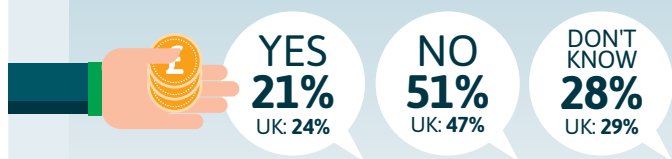
# Deterrents and Attitudes

## Key Information

- Only 21% of Northern Irish smokers believe there are sufficient deterrents to the illicit tobacco trade which is fewer than the UK national average (24%).
- 54% of Northern Irish smokers agree that rising tobacco prices tempt them to purchase untaxed tobacco.
- 89% of Northern Irish smokers believe tobacco prices are too high, similar to the national average of 88%.

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: NI 356 | UK 12,065



What smokers said when asked why they did not report illicit tobacco that they were aware of in their area?

"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."  
Female, Northern Ireland, £6,001-£9,999



"If government [sic] want to keep rising the cost people will seek cheaper alternative."  
Male, Northern Ireland, £30,000-£39,999

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

BASE: NI 356 | 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.	34%	25%	26%	6%	9%
On the spot fines for those selling illegal tobacco	37%	28%	22%	6%	7%
Make it easier to name and shame people or companies that illegally evade tobacco tax	36%	24%	27%	6%	7%
Make landowners and landlords more responsible for illegal goods sold on their premises	29%	19%	31%	12%	9%
Make social media websites more responsible for illegal tobacco when it is promoted or sold via their platforms	35%	21%	31%	5%	8%
Encourage landlords to evict tenants who sell illegal tobacco	24%	15%	33%	12%	15%

Do you believe UK tobacco prices are?

BASE: NI 356 | UK 12,065



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

BASE: NI 356 | 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%	27%	18%	8%	19%
Recent changes to tobacco product sizes or packaging have made me more likely to purchase tobacco that has not been subject to UK taxes	19%	24%	22%	12%	23%
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	46%	21%	17%	6%	9%
I have no objections to buying tobacco that has not been subject to UK taxes from – friend/relative, shops, etc.	18%	23%	22%	12%	24%
I am nervous about buying tobacco that has not been subject to UK taxes in case the product is counterfeit	31%	26%	24%	10%	9%
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	24%	20%	28%	18%	9%