

# SMOKERS' ATTITUDES, AWARENESS AND UNDERSTANDING OF ILLICIT TOBACCO

In autumn 2020, the TMA commissioned a nationwide poll of over 12,000 smokers on their attitudes, awareness and understanding of illicit tobacco. The 2020 results supplement those of similar surveys carried out by the TMA over the last six years and results are compared where possible.



## Key Findings

**70%**

of those surveyed bought tobacco in the last year that has not been subject to UK tax (not including purchases abroad or Duty Free).

**1 in 5**

claimed to only buy 'branded' tobacco (i.e. not plain packaged cigarettes or Roll Your Own) even though it has been illegal in the UK since 2016.

**Over 3/4**

of respondents aged 18-24 have purchased non-UK duty paid tobacco in the last year.

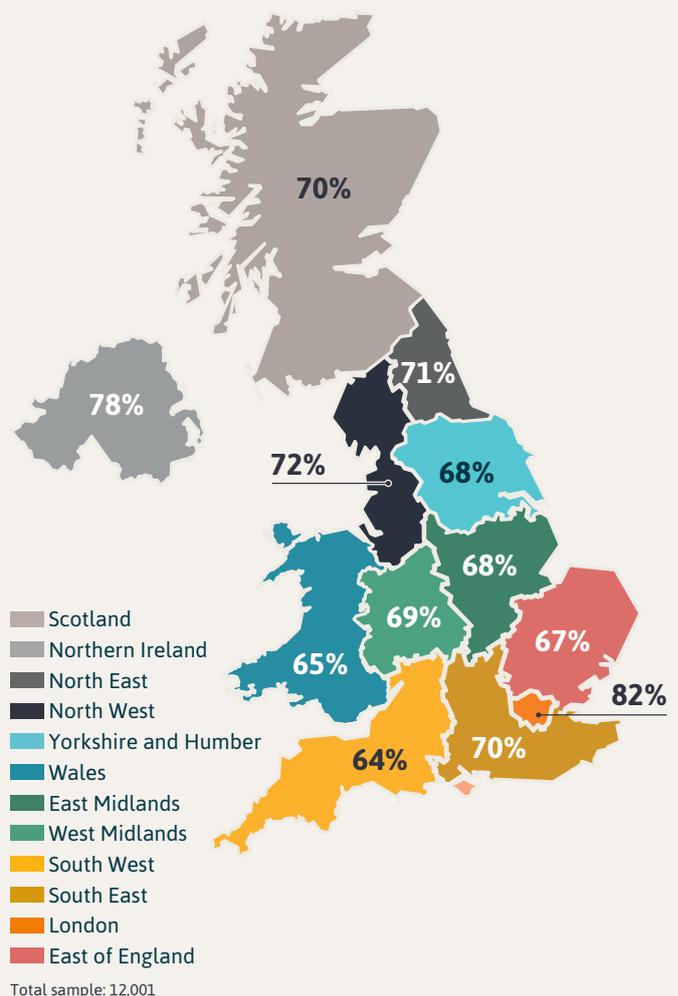
**19%**

answered that they had reported the sale of illicit tobacco in the past 12 months (up 4% since 2019).

**16%**

of respondents bought tobacco through social media or websites advertising cheap tobacco since the onset of the 'first lockdown' (compared to 4% before the Covid-19 pandemic).

## Percentage of Smokers buying illegal tobacco by region



# OVERALL PURCHASING PATTERNS

## Key Information

**30%**

of respondents buy tobacco from friends and family who smoke (down 3% on 2019), while 18% (no change) buy tobacco from friends and family who are non smokers.

**50%**

of those asked buy tobacco products when travelling outside the UK at least once a year (up 9% on 2019).

**59%**

of respondents say they buy tobacco at least once a year from Duty Free (up 2% on 2019).

**4%**

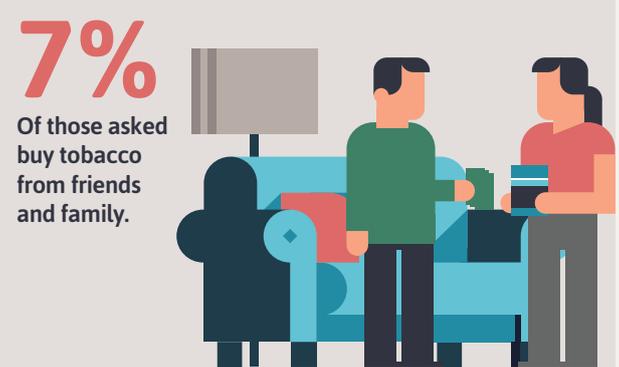
of respondents (up 1% on 2019) routinely buy tobacco through social media or websites advertising cheap tobacco (of which 10% buy tobacco at least once a month).

## Where do you typically buy tobacco? BASE: 12,001 | ALL INTERVIEWS



## At what location

	UK
Friends and family	7%
Internet (social media and/or websites advertising cheap tobacco)	4%
Festivals/Pubs/Bars	3%
Private houses (e.g. 'fag'/'tab' houses)	3%
Someone selling in a pub, bar or café (i.e. a non-employee)	3%
Workplace	3%
Vans	2%
People in the street (i.e. individuals in public place not listed above)	2%
Other	1%
Don't know	0%



## How often do you buy tobacco from the following sources? BASE: 12,001 | ALL INTERVIEWS

Location	Never	Once a day	2-3 times a week	Once a week	Once a fortnight	Once a month	Once every 3 months	Once a year	Don't know
Markets or car boot sales	84%	2%	2%	3%	1%	1%	1%	2%	1%
Vans	87%	1%	2%	2%	1%	2%	1%	1%	2%
Workplace	85%	2%	2%	2%	1%	2%	2%	2%	2%
Private houses (e.g. 'fag'/'tab' houses)	86%	2%	2%	3%	2%	2%	1%	2%	2%
Friends & family who smoke	70%	2%	3%	4%	3%	4%	5%	6%	2%
Friends & family who do not smoke	82%	1%	2%	2%	2%	2%	2%	4%	2%
Internet (social media and/or websites advertising cheap tobacco)	85%	2%	2%	2%	2%	2%	2%	2%	2%
Someone selling in a pub, bar, café etc. (i.e. a non-employee)	82%	2%	2%	3%	2%	2%	2%	4%	2%
People in the street (i.e. individuals in public places not listed above)	87%	2%	2%	2%	1%	2%	1%	1%	2%
Abroad (in a local shop when travelling outside the UK)	46%	3%	3%	4%	2%	2%	7%	30%	3%
Duty Free	41%	1%	1%	2%	1%	2%	8%	39%	4%

# NON-UK DUTY PAID PURCHASING PATTERNS

## Key Information

Respondents from London remain the most likely to buy non-UK duty paid tobacco (all areas have shown a decrease in 2020 except Northern Ireland which is up by 2% on 2019).



# 77%

of respondents aged 18-24 have purchased non-UK duty paid tobacco in the last year.

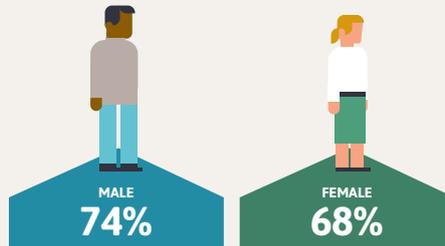
# 20%

of those asked spent between £8.01-£14.00 each week on non-UK duty paid tobacco.

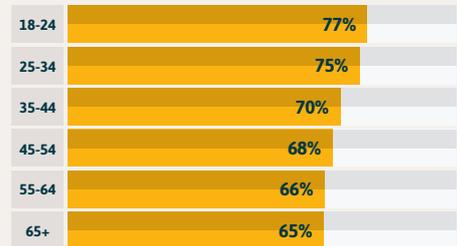
# 2 in 5

respondents spent up to £4.00 each week on non-UK duty paid tobacco.

## Percentage of respondents who had bought non-UK duty paid tobacco by gender. BASE: 12,001 | ALL INTERVIEWS



## Percentage of respondents who had bought non-UK duty paid tobacco by age. BASE: 12,001 | ALL INTERVIEWS



# PURCHASING ENVIRONMENT, VIEWS ON RULES AND REGULATIONS

## Key Information

# 42%

of those asked had no objection to buying tobacco that has not had UK tax paid on it from a friend/relative, shops, etc.

# 52%

of respondents believe expensive tobacco prices tempt them to buy tobacco that has not had UK tax paid on it.

# 1 in 5

claimed to only buy 'branded' tobacco (i.e. not plain packaged cigarettes or Roll Your Own) even though it has been illegal in the UK since 2016.

# 1 in 4

respondents purchased tobacco which they knew was not subject to UK tax spent £20 or more each week.

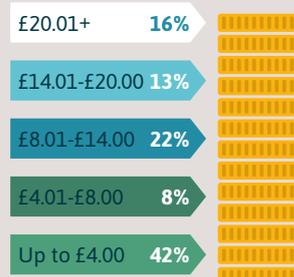
## To what extent do you agree or disagree with each of these statements: BASE: 12,001 | ALL INTERVIEWS

Question	Disagree strongly	Disagree	No opinion offered	Agree	Agree strongly
Expensive tobacco prices tempt me to buy tobacco that has not had UK tax paid on it	12%	15%	21%	32%	20%
I have no objection to buying tobacco for myself that has not had UK tax paid on it, as long as it is from a legal source	6%	9%	20%	37%	29%
I have no objection to buying tobacco that has not had UK tax paid on it from a friend/relative, shops etc.	11%	19%	27%	28%	14%
I am nervous about buying tobacco that has not had UK tax paid on it in case the product is counterfeit	5%	14%	25%	33%	22%

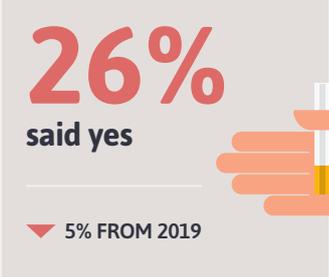
## On each occasion, you purchase tobacco in the UK that have not been subject to UK tax (e.g. bought cheaply at the pub or online), how much do you typically buy? BASE: 1,304

Cigarettes	%	Roll Your Own	%
Single sticks	2%	50g	45%
1 pack (20 cigarettes)	25%	100g	7%
2 packs (40 cigarettes)	9%	150g	4%
5 packs (100 cigarettes)	7%	250g	7%
1 carton (200 cigarettes)	14%	500g	5%
2 cartons (400 cigarettes)	3%	750g	0%
3 cartons (600 cigarettes)	1%	1kg	0%
4 cartons (800 cigarettes)	1%	More than 1kg	0%
5 cartons (1000 cigarettes)	1%	I don't buy any	27%
More than 5 cartons	1%	I don't know	4%
I don't buy any	33%		
I don't know	4%		

## How much do you typically spend a week on tobacco which you know has not been subject to UK tax (e.g. cheap purchases in a pub or cheap purchases online)? BASE: 8,485 | THOSE WHO BOUGHT TOBACCO FROM ANY SOURCE



## Are you aware of illicit tobacco (UK tax has not been paid on including branded packs of cigarettes and hand rolling tobacco) being sold in your area? BASE: 12,001 | ALL INTERVIEWS



# UK OUTSIDE THE EU AND NON-UK DUTY PAID TOBACCO

## Key Information

# 53%

of respondents believe it is okay to buy tobacco overseas and in Duty Free shops and bring it back to the UK to sell to friends and family.

**More than 1 in 5** of those asked typically buy more than 600 cigarettes (3 x cartons) when they go abroad to bring back to the UK (personal allowance threshold is 200 cigarettes).

# Over 1/3

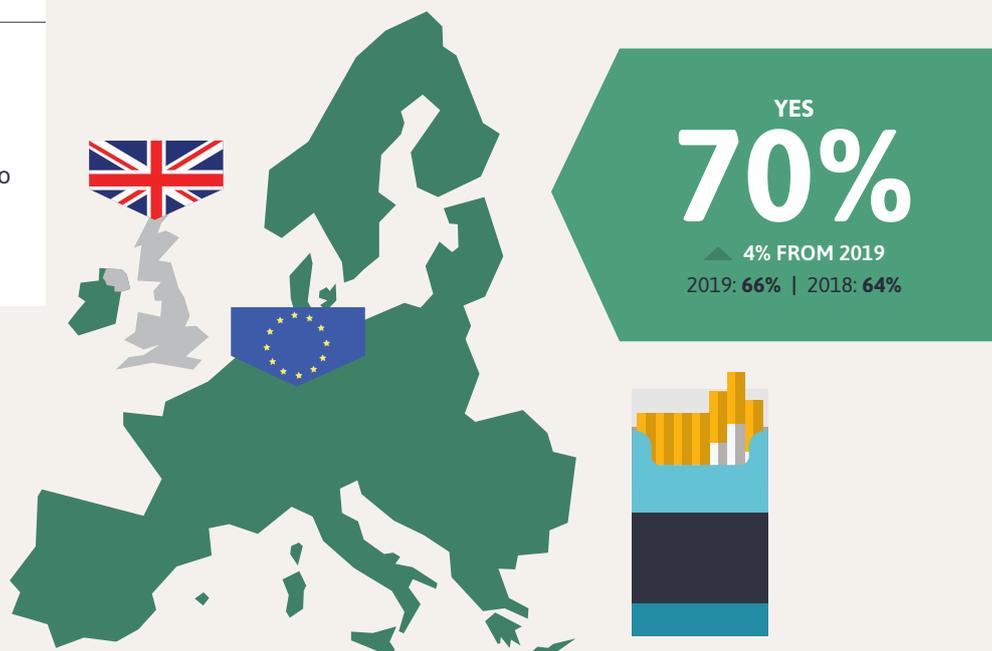
of respondents routinely buy more than 250g of Roll Your Own tobacco when they go abroad to bring back to the UK (personal allowance threshold is 250g RYO).



## Which of the following statements do you agree with? BASE: 12,001 | ALL INTERVIEWS

Question	2020	2019
It's okay to buy tobacco overseas and in Duty Free shops and bring it back to the UK to sell to friends and family	53%	57%
I plan to buy tobacco products abroad and bring back as many cigarettes/tobacco as I legally can	57%	61%
I know where to find the rules to tell me how much tobacco I can bring back into the UK from abroad	64%	64%
I don't like buying cigarettes/tobacco in overseas Duty Free shops	29%	27%

## Do you support the return of Duty Free shopping from EU countries if it included a limit of 200 cigarettes or 250g of Roll Your Own tobacco? BASE: 12,023 | ALL INTERVIEWS

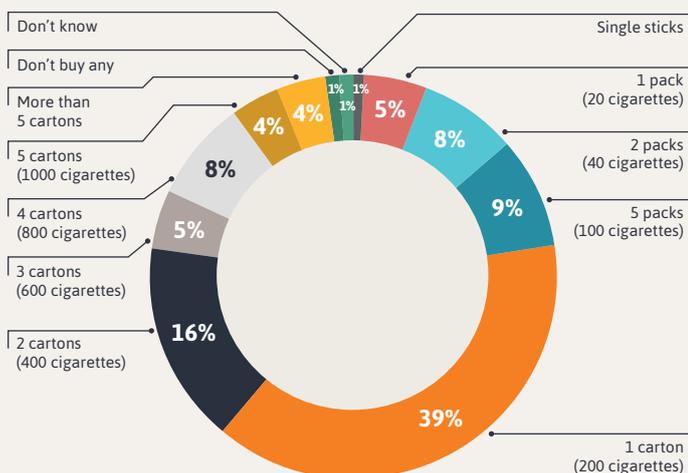


## On each occasion, you purchase tobacco from abroad to bring back to the UK, how much do you typically buy? BASE: 3,769 | ALL INTERVIEWS

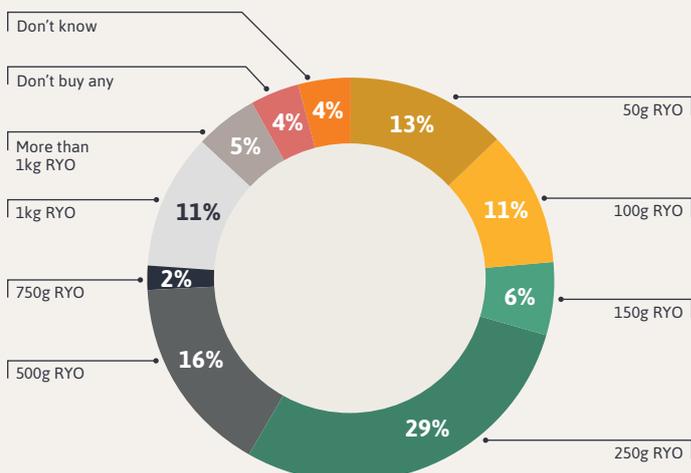
BASE: 3,769 | ALL INTERVIEWS

BASE: 2,250 | ALL INTERVIEWS

### Cigarettes



### Roll Your Own



# AWARENESS OF ILLICIT TOBACCO

## Key Information

More than 25% of respondents are aware of illicit tobacco being sold in their area.

The **top four** venues for the sale of illicit tobacco are **bars and pubs (27%)**, **friends and family (23%)**, **private 'tab' or fag' houses (21%)**, and **markets or car boot sales (21%)**.

# 86%

of respondents who are aware of illicit cigarettes being sold in their area have seen them traded for £6.00 or less for a 20 pack (average legal price £11.11).

# 1 in 2

smokers who are aware of illicit Roll Your Own tobacco being sold in their area have seen it traded for £8.00 or less for 50g (average legal price £22).

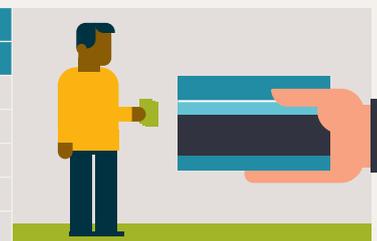
## When you have seen illicit tobacco being sold what price range have they been within for 20 pack of cigarettes? BASE: 1,677

	2020	2019
	%	%
£3.00 or Less	7%	10%
£3.01 to £4.00	22%	30%
£4.01 to £5.00	34%	32%
£5.01 to £6.00	23%	17%
£6.00 or More	14%	10%



## When you have seen illicit tobacco being sold, what price range have they been within for a pack of 50g rolling tobacco? BASE: 1,392

	2020	2019
	%	%
£5.00 or less	10%	11%
£5.01 to £6.00	13%	12%
£6.01 to £7.00	13%	10%
£7.01 to £8.00	13%	13%
£8.01 or more	51%	55%

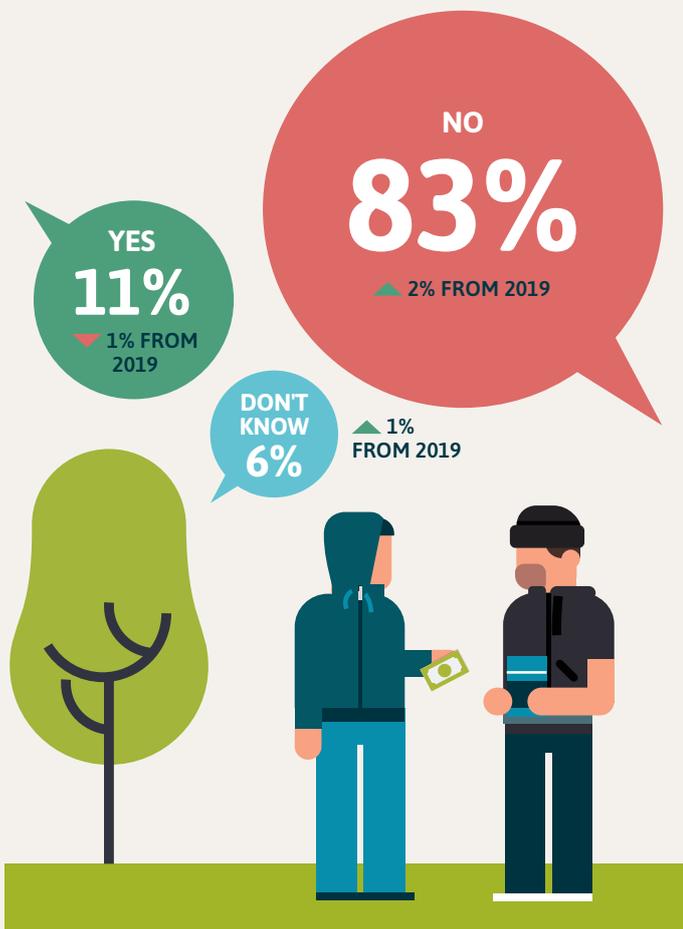


## Have you seen the following non-UK shop brands and if so have you purchased them? BASE: 12,001 | ALL INTERVIEWS



Non-UK shop brand	Seen	...then Purchased
Email	10%	45%
Fest/PECT	14%	48%
Flandria	16%	41%
Minsk	17%	31%
NZ Gold	12%	41%
Richman	26%	36%
Springfield	18%	36%
The Turner	22%	41%

## Within the last year, are you aware of any under 18s buying or selling illicit tobacco locally? BASE: 12,001 | ALL INTERVIEWS



# REPORTING OF ILLICIT TOBACCO

## Key Information

# 78%

(down 4% on 2019) of those who are aware of illicit tobacco being sold in the last 12 months have not reported it.

# 1 in 5

respondents who were aware of illicit tobacco being sold in their area did not know to whom they should report it.

Those that do report seeing illicit tobacco in their area, report it to: Police (45%), HMRC (35%), Trading Standards (30%), Crimestoppers (28%), Local Council (28%), Media & others (16%) and Don't Know (8%).

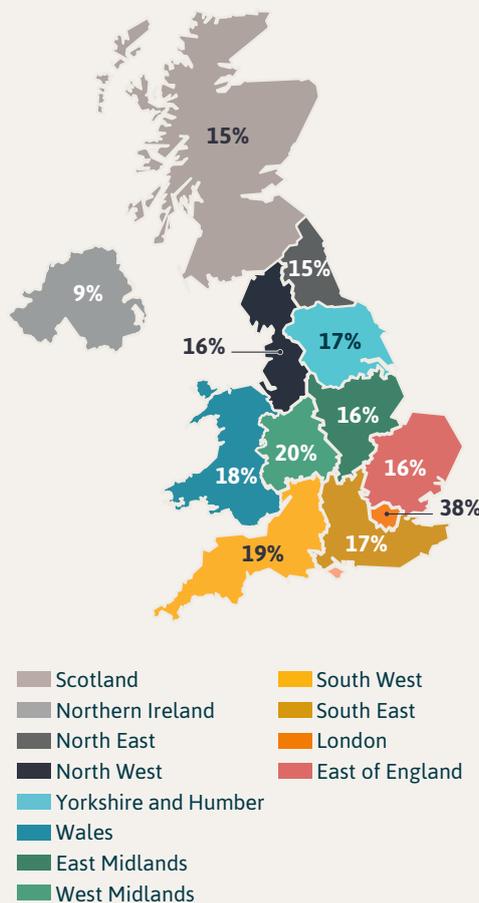
# 55%

(down 7% from 2019) of those asked had not reported the sale of illicit tobacco to anyone because they believed it was 'none of their business'.

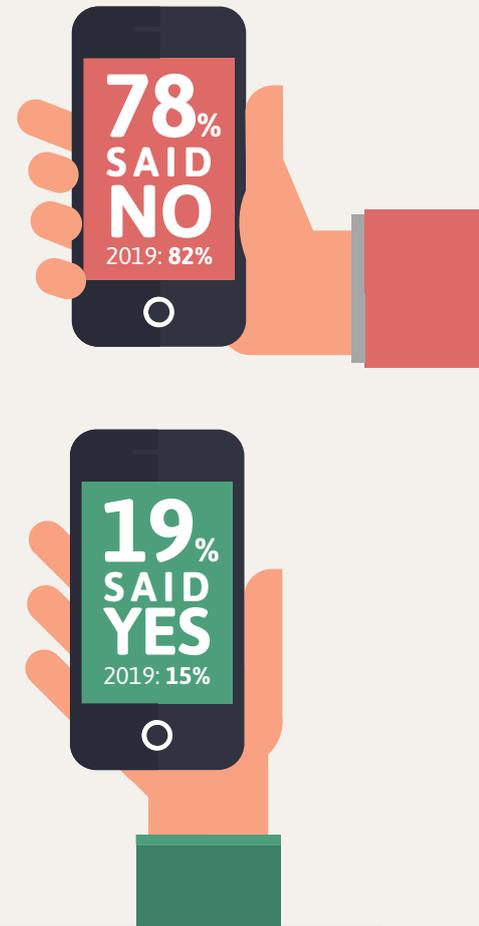
### Connections between illicit tobacco and other similar illegal activities:

**1 in 3** of respondents between the age of 18-34 who were aware of illicit tobacco being sold, were also aware of other illegal activities taking place in their area.

Have you reported the sale of illicit tobacco to anyone in the last 12 months – by region? BASE: 3,070



Have you reported the sale of illicit tobacco in the past 12 months? BASE: 3,070



If you have reported the sale of illicit tobacco in the past 12 months, who was it to? BASE: 594



# 45%

POLICE

6% FROM 2019



# 35%

HM REVENUE & CUSTOMS

2% FROM 2019



# 30%

TRADING STANDARDS

5% FROM 2019



# 28%

CRIMESTOPPERS

3% FROM 2019



# 28%

LOCAL COUNCIL

4% FROM 2019



# 14%

THE MEDIA

6% FROM 2019

2% OTHER | 8% DON'T KNOW

If you have not reported the sale of illicit tobacco to anyone, why was that? BASE: 2,386

Question	2020	2019
I didn't know who to tell	20%	20%
I was afraid to tell anyone in case I got into trouble	19%	13%
It's none of my business	55%	62%
I have reported it in the past but no action was taken	7%	6%
Other	7%	7%
Don't Know	8%	4%

The illicit tobacco trade can be used as a front for other illegal activities such as people trafficking and modern slavery. Have you ever been aware of any similar illegal activity in your local area? BASE: 3,070



# IMPACT OF COVID-19 (FIRST LOCKDOWN APR-JUN) ON CONSUMER BEHAVIOUR TOWARDS ILLICIT TOBACCO

## Key Information

# 16%

of respondents purchased tobacco through social media and/or websites advertising cheap tobacco since the onset of 'lockdown' (compared to 4% before the pandemic).

# 1 in 5

asked bought tobacco from friends & family since the onset of 'lockdown' (compared to 7% before the pandemic).

# Nearly 1 in 4

of respondents found it harder to buy tobacco from corner shops/newsagents during the 'first lockdown'.

Thinking back to the first Covid-19 'lockdown' (April-June 2020) did you find it harder to obtain cigarettes/Roll Your Own cigarettes from the following sources? BASE: 12,001 | ALL INTERVIEWS



CORNER SHOP / NEWSAGENTS:

# 24%

HARDER TO OBTAIN CIGARETTES/  
ROLL YOUR OWN CIGARETTES



SUPERMARKETS – INCLUDING  
ONLINE DELIVERY:

# 22%

HARDER TO OBTAIN CIGARETTES/  
ROLL YOUR OWN CIGARETTES

At what location	UK
Duty Free (at the airport, ferry or Eurotunnel)	9%
Abroad (in a local shop when travelling outside the UK)	8%
From friends and family	6%
Other	5%
Markets or car boot sales	4%
Workplace	4%
Private houses (e.g. 'fag'/'tab' houses)	4%
Festivals / Pubs / Bars	4%
Vans (e.g. ice cream vans)	3%
Someone selling in a pub, bar or café (i.e. a non-employee)	3%
Internet (social media and/or websites advertising cheap tobacco)	2%
People in the street (i.e. individuals in public place not listed above)	2%
Don't Know	44%

# 9%

Of those asked found it harder to obtain cigarettes/Roll Your Own cigarettes from Duty Free at the airport, ferry or Eurotunnel.



Has the 'lockdown' changed where you usually buy your tobacco products? BASE: 12,001 | ALL INTERVIEWS



Where have you purchased your tobacco from since the onset of 'lockdown'? BASE: 1,910

Location	Yes
Corner shops/newsagents/supermarkets	68%
Friends & family	20%
Internet (social media and/or websites advertising cheap tobacco)	16%
Other	10%
Private houses (e.g. 'fag'/'tab' houses)	9%
Someone selling in a pub, bar or café (i.e. a non-employee)	8%
Workplace	6%
Vans	4%
People in the street (i.e. individuals in public place not listed above)	4%
Don't Know	2%

# DETERRENENTS FROM BUYING AND SELLING ILLICIT TOBACCO

## Key Information

**47%**

of respondents don't believe there are sufficient deterrents in place to stop people from buying and selling illicit tobacco.

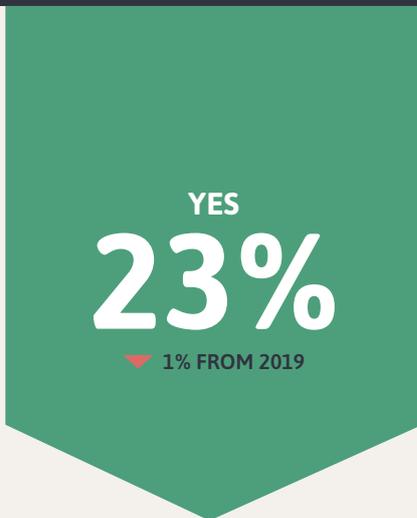
**86%**

of people have not seen any recent media coverage (e.g. local paper, internet, twitter, radio & TV) about the dangers of illicit tobacco in their area.

**Only 50%**

of those questioned believe that there are sufficient legal deterrents in place (e.g. likelihood of being caught, level of punishment etc.) to dissuade or prevent people from selling and/or buying illicit 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? BASE: 12,001 | ALL INTERVIEWS



Do you think the following are sufficient deterrents to dissuade or prevent people from selling and/or buying illicit tobacco? BASE: 12,001 | ALL INTERVIEWS



**LEGAL DETERRENENTS**  
(e.g. high likelihood of getting caught and severe level of punishment)

**YES**

**69%**

**NO**

**31%**

2019:  
**YES 49% | NO 33%**



**SOCIAL DETERRENENTS**  
(e.g. people have a negative perception of using illicit tobacco)

**56%**

**44%**

2019:  
**YES 34% | NO 47%**



**MEDIA DETERRENENTS**  
(e.g. frequent advertising campaigns or articles against illicit tobacco)

**53%**

**47%**

2019:  
**YES 43% | NO 44%**



**POLITICAL DETERRENENTS**  
(e.g. clear and direct Government action and sentiment against illicit tobacco)

**55%**

**45%**

2019:  
**YES 36% | NO 42%**



**ECONOMIC DETERRENENTS**  
(e.g. the price of legitimate tobacco is not too high)

**69%**

**31%**

2019:  
**YES 47% | NO 33%**

Have you seen any recent media about the dangers of illicit tobacco in your area (local paper/internet/radio/TV)?

BASE: 12,001 | ALL INTERVIEWS



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