

TMA Smokers' Anti-Illicit Trade Survey 2018: Attitudes, Awareness and Understanding

In April and May 2018, the TMA commissioned a nationwide poll of adult smokers to understand their attitudes, awareness and understanding of illicit tobacco. The questions received input from HM Revenue and Customs and other stakeholders. The 2018 results supplement those of similar surveys conducted by the TMA over the past four years and the results are compared where possible.

Key Findings

Legislative changes introduced in the last year appear to be pushing smokers to buy untaxed tobacco with

28% of respondents agreeing that the introduction of mandatory plain packaging and

37% saying the ban on small packs has made them more likely to do so.

76%

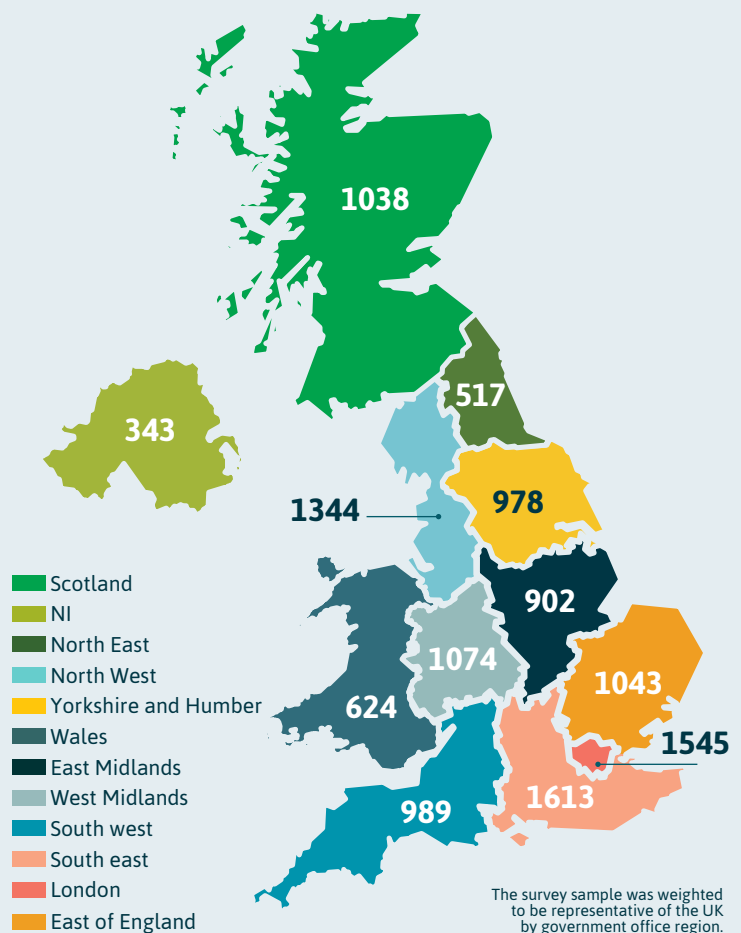
of adult smokers buy tobacco products from non-UK duty paid sources – an increase on 73% last year.

85%

London has the highest prevalence of non-UK duty paid tobacco purchases (85%) and Wales had the lowest prevalence (70%).

Adult smokers of all ages were more likely to buy non-UK duty paid sources than last year.

Responses by region



Survey total = 12,010

The survey sample was weighted to be representative of the UK by government office region. Some totals may not add up to 100% due to rounding.

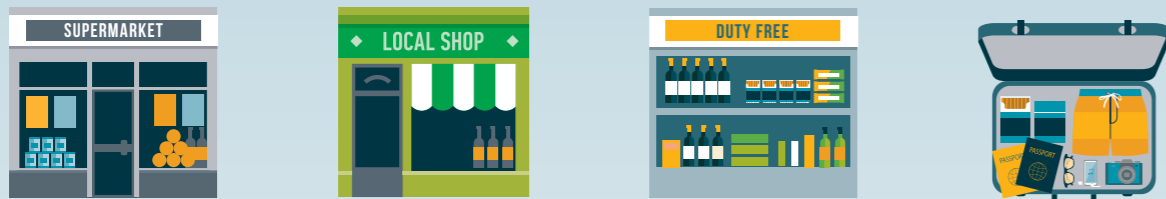
Overall Purchasing Patterns

Key Information

- Corner shops and supermarkets appear to be slightly less common places to buy tobacco products in 2018 than in previous years (down 7% and 5% from 2017 respectively).
- 17% of adult smokers buy tobacco products at least once a year from friends and family who do not smoke.
- 57% of respondents say they buy tobacco from Duty Free at least once a year.

Where do you buy your tobacco products?

BASE: 12,010 | ALL INTERVIEWS



Location	UK
Friends and family	7%
Festivals/Pubs/Bars	3%
Markets or car boot sales	3%
Private houses – so-called ‘fag’ or ‘tab’ houses	3%
Internet – social media and/or websites advertising cheap tobacco	3%
Someone selling in a pub, bar or café i.e. a non-employee	3%
Vans	2%
Workplace	3%
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: 12,010 | ALL INTERVIEWS

Location	Never	More than once a week	Once a week	Once a fortnight	Once a month	Three to six times a year	Once every six months	Once a year	Don't know
Markets or car boot sales	85%	6%	2%	1%	1%	2%	1%	1%	2%
Vans	87%	4%	2%	1%	1%	2%	0%	1%	2%
Workplace	85%	5%	2%	1%	2%	2%	1%	1%	2%
Private houses (so-called ‘fag’ or ‘tab’ houses)	86%	4%	2%	1%	2%	2%	1%	1%	2%
From friends and family that smoke	68%	6%	3%	3%	5%	6%	3%	4%	2%
Internet (social media and/or websites advertising cheap tobacco)	86%	4%	2%	1%	2%	2%	1%	1%	2%
Someone selling in a pub, bar or café i.e. a non-employee	81%	4%	2%	2%	2%	3%	1%	2%	2%
People in the street	87%	4%	2%	1%	1%	2%	1%	1%	2%
Abroad (in a local shop when travelling outside the UK)	45%	6%	3%	1%	2%	8%	10%	21%	3%
From friends and family that do not smoke	81%	4%	2%	1%	2%	4%	2%	3%	2%
Duty Free	40%	3%	1%	1%	2%	10%	12%	28%	4%

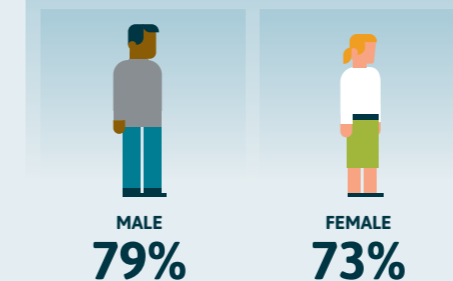
Non-UK Duty Paid Purchasing Patterns

Key Information

- 76% of adult smokers buy tobacco products from non-UK duty paid sources – an increase from 73% last year.
- Respondents from London were most likely to buy non-UK duty paid tobacco products.
- Adult smokers on the lowest incomes were most likely to buy tobacco products from non-UK duty paid sources excluding from abroad and Duty Free.

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

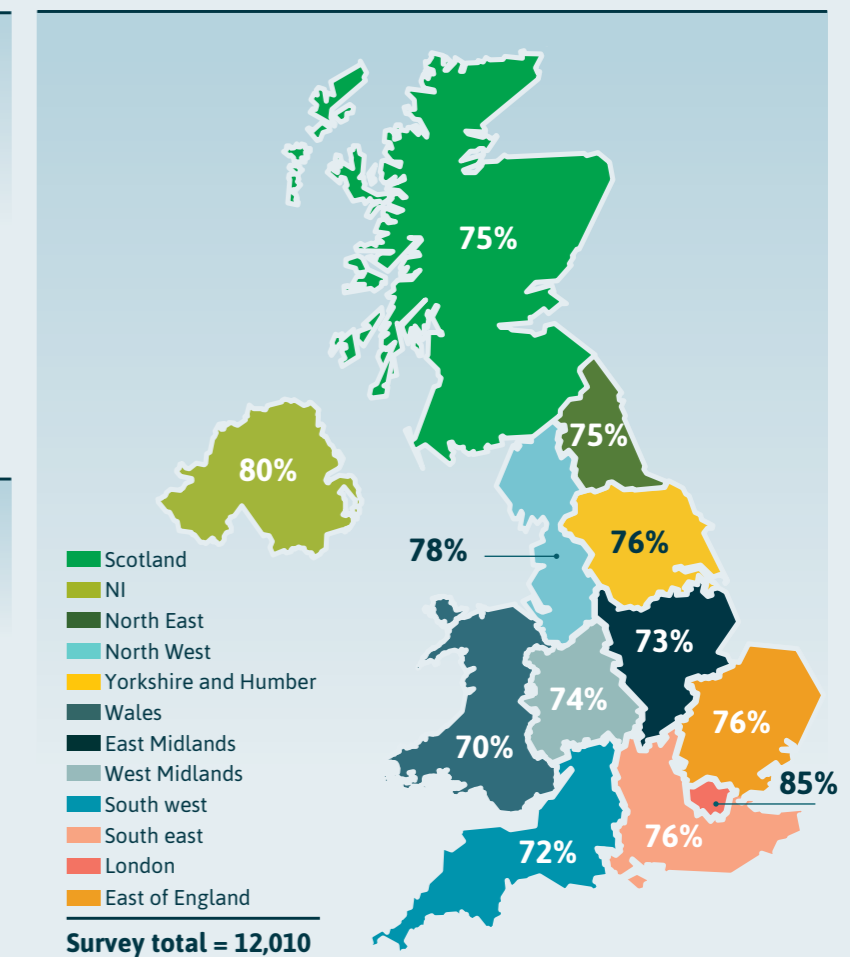
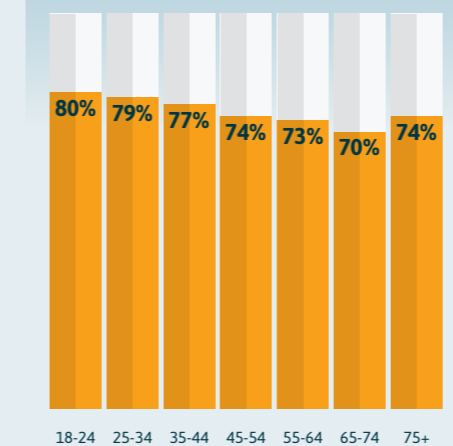
BASE: 12,010



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

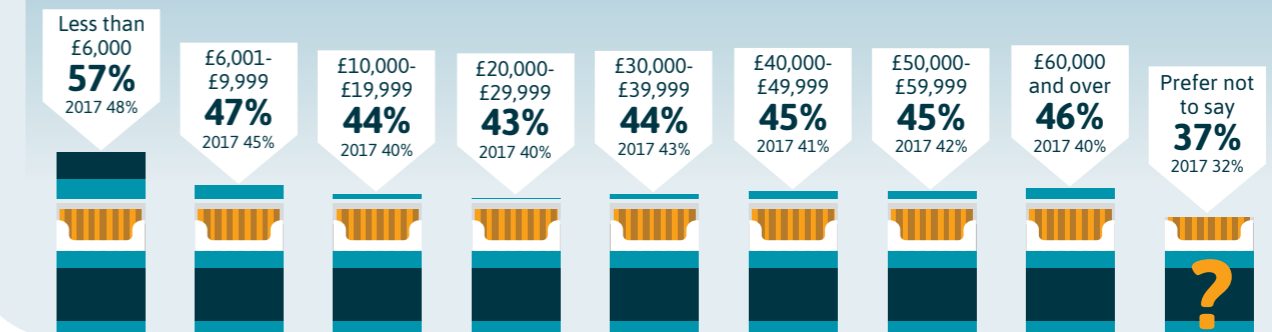
Percentage of respondents who had bought non-UK duty paid tobacco products by age.

BASE: 12,010



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

BASE: 12,010



New regulations and taxes

Key Information

- 28% of respondents agreed that plain packaging made them more likely to buy untaxed tobacco.
- Over a quarter of respondents (26%) are aware of illicit tobacco products in their local area – much higher than last year (20%).
- 37% of respondents agree that the ban on small tobacco packs has made them more likely to buy untaxed tobacco.
- 86% of respondents agree that tobacco prices are too high.

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

BASE: 12,010 | 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	15%	9%	20%	29%	27%
The recent introduction of plain tobacco packaging has made me more likely to purchase untaxed tobacco	23%	14%	34%	16%	12%
The recent introduction of minimum pack sizes has made me more likely to purchase tobacco	21%	15%	28%	20%	17%
I have no objections to buying tobacco that has not been subject to UK taxes for myself	7%	6%	21%	27%	39%
I have no objections to buying tobacco that has not been subject to UK taxes from – friend/relative, shops, etc.	14%	12%	28%	26%	21%
I am nervous about buying tobacco that has not been subject to UK taxes in case the product is counterfeit	9%	12%	24%	28%	26%

Are you aware of illicit tobacco products (UK tax has not been paid including non-plain packaged cigarettes and hand rolling tobacco) being sold in your area?

BASE: 12,010 | ALL INTERVIEWS



26% said yes
 2017: 20% 2015: 19%
 2016: 20% 2014: 30%

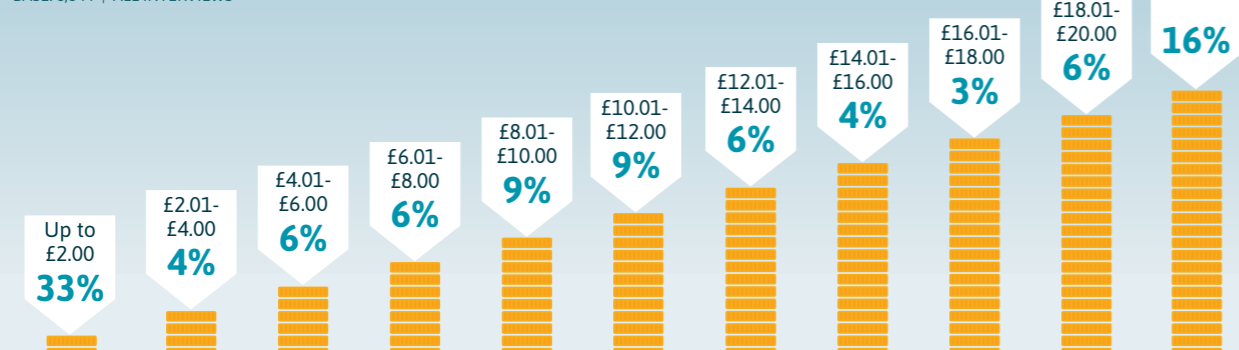
Do you believe UK tobacco prices are?

BASE: 12,010 | ALL INTERVIEWS



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

BASE: 8,844 | ALL INTERVIEWS



Brexit and non-UK duty paid tobacco

Key Information

- Almost two thirds of respondents would support the return of Duty Free tobacco shopping post Brexit if it included a limit of 200 cigarettes.
- Over half of people believe it is ok to sell tobacco that you have bought abroad in the UK despite it being illegal if you don't pay UK duty.
- 38% of respondents who brought back roll your own tobacco from abroad typically brought more than 250g.

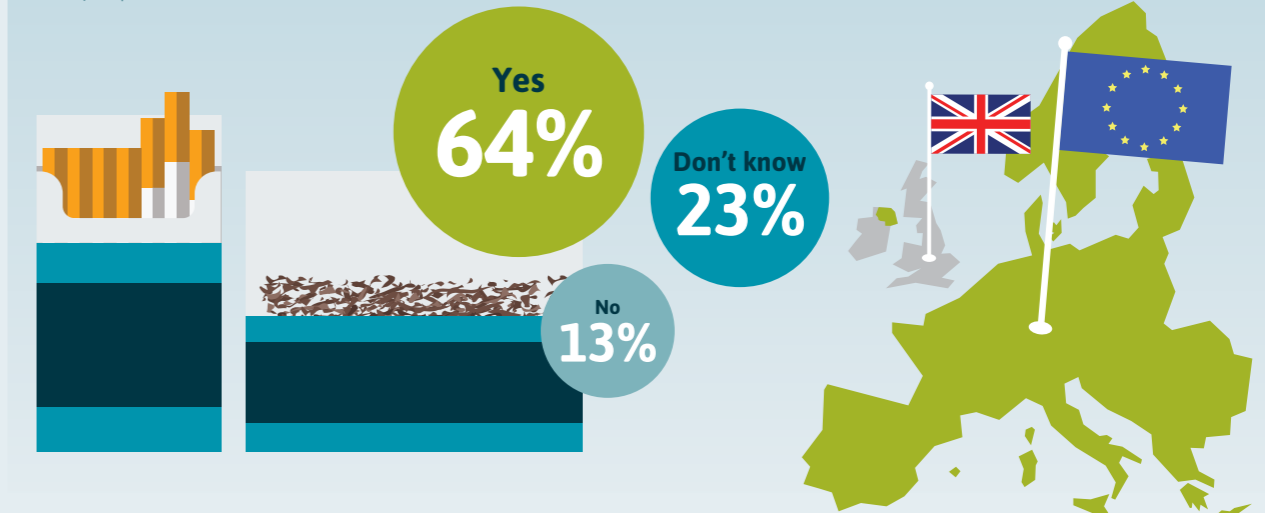
Which of the following statements do you agree with:

BASE: 12,010 | ALL INTERVIEWS

Question	Yes	No
It's ok to buy tobacco overseas and in duty free shops and bring it back to the UK to sell	54%	46%
I plan to buy tobacco products abroad and bring back as many cigarettes / tobacco as I legally can	59%	41%
I know where to find the rules to tell me how much tobacco I can bring back into the UK from abroad	62%	39%
I don't like buying cigarettes / tobacco in overseas or Duty Free shops	27%	73%

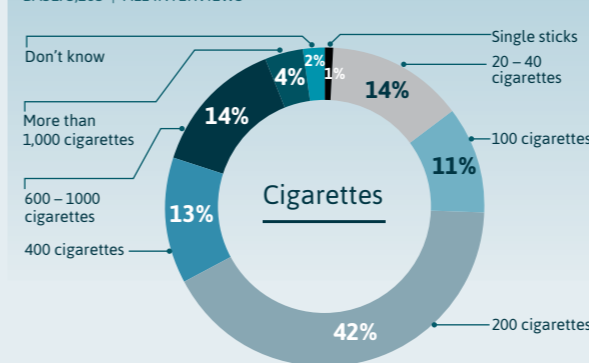
Would you support the return of Duty Free tobacco shopping from EU countries if it included a limit of 200 cigarettes or 250 grams roll your own tobacco?

BASE: 12,010 | ALL INTERVIEWS



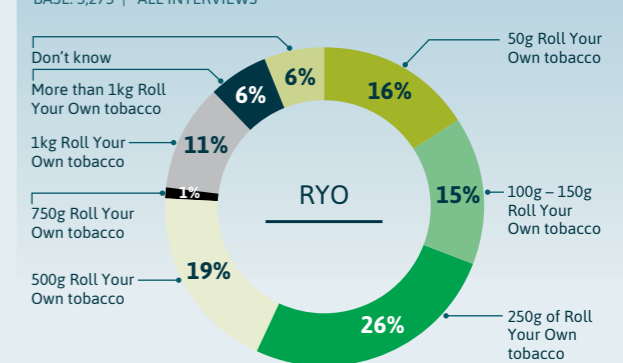
On each occasion, you purchase tobacco from abroad to bring back to the UK, how much do you typically buy?

BASE: 5,263 | ALL INTERVIEWS



On each occasion, you purchase tobacco from abroad to bring back to the UK, how much do you typically buy?

BASE: 3,273 | ALL INTERVIEWS



Awareness of illicit tobacco

Key Information

- The average price of 20 illicit cigarettes was £4.33 – significantly below legal retail prices.
- Awareness of under 18s buying or selling illicit tobacco fell slightly to 11% from 12% last year.
- More than one in five respondents had seen Richman tobacco products in their local area despite it not being sold in the UK.

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

BASE: 1,717 | ALL INTERVIEWS

	2014	2015	2016	2017	2018
	%	%	%	%	%
£3.00 or Less	19%	21%	18%	12%	11%
£3.01 to £4.00	45%	43%	32%	37%	32%
£4.01 to £5.00	21%	23%	29%	28%	31%
£5.01 to £6.00	9%	8%	12%	15%	16%
£6.00 or More	6%	5%	8%	8%	10%

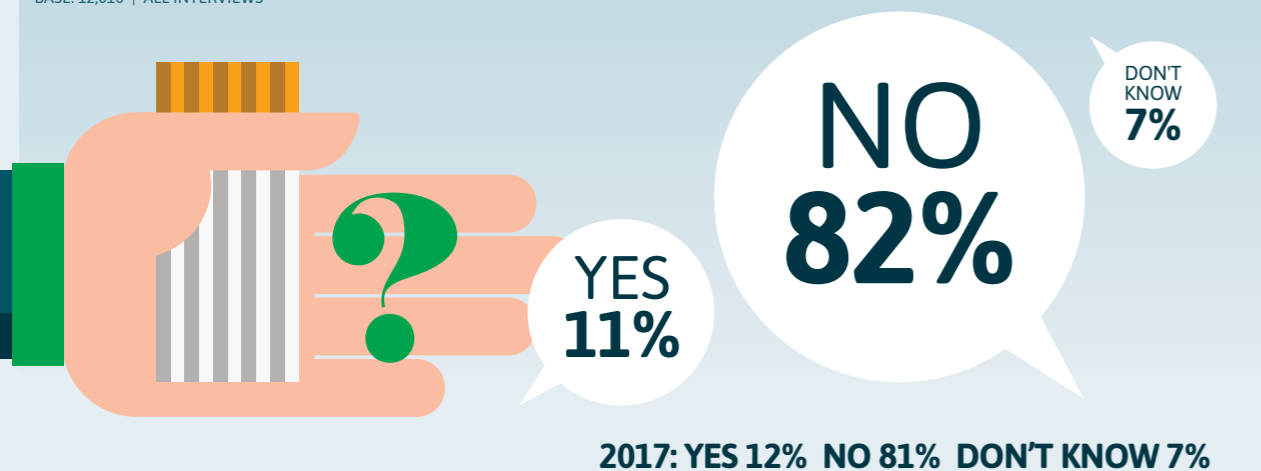
When you have seen illicit tobacco products being sold, what price range have they been within for a pack of 50g rolling tobacco?

BASE: 1,364 | ALL INTERVIEWS

	2014	2015	2016	2017	2018
	%	%	%	%	%
£5.00 or Less	18%	16%	18%	12%	10%
£5.01 to £6.00	16%	16%	14%	12%	13%
£6.01 to £7.00	18%	14%	14%	12%	13%
£7.01 to £8.00	28%	24%	20%	18%	15%
£8.00 or More	20%	29%	34%	45%	49%

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

BASE: 12,010 | ALL INTERVIEWS



Have you seen the following non-shop brands and if so have you purchased them?

BASE: 12,010 | ALL INTERVIEWS

Question	Seen	Purchased
Eastenders	12%	48%
Fest / PECT	14%	38%
Flandria	11%	44%
Minsk	15%	35%
Richman	23%	33%
The Turner	22%	41%
Email	7%	44%
Springfield	15%	39%



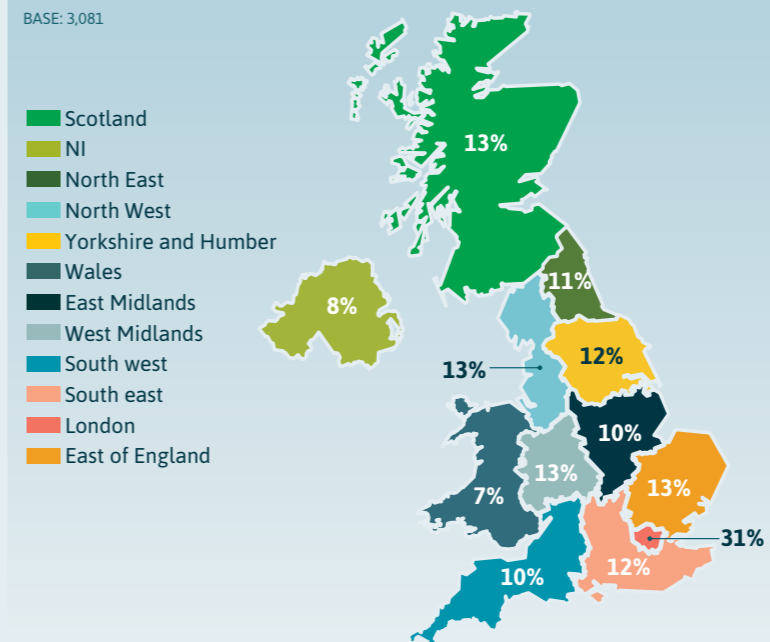
Reporting of illicit tobacco

Key Information

- 14% of respondents who are aware of illicit tobacco have reported it – a slight increase on 12% from 2016 – and London has by far the best reporting rate (31%).
- The Police (38%) remains the most popular organisation to report illicit tobacco to.
- Similarly the primary reason (62%) for not reporting illicit tobacco is that 'it is none of my business'.

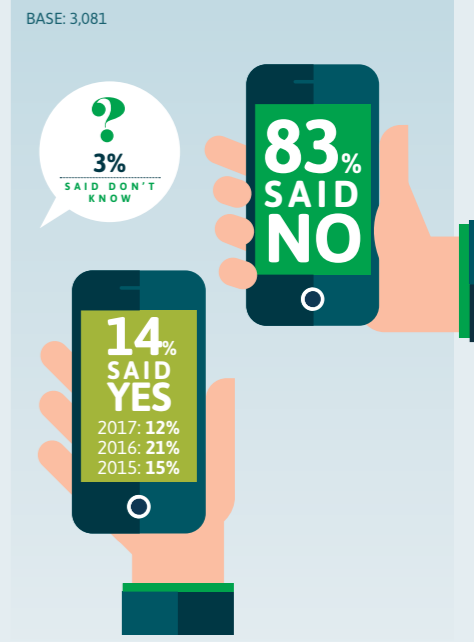
Have you reported the sale of illicit tobacco products to anyone in the past 12 months – by region?

BASE: 3,081



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

BASE: 3,081



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

BASE: 442 | ALL INTERVIEWS



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

BASE: 2,545

Question	2014	2015	2016	2017	2018
I didn't know who to tell	18%	20%	21%	15%	20%
I was afraid to tell anyone in case I got in to trouble	13%	18%	17%	13%	14%
It's none of my business	59%	57%	57%	64%	62%
Other	11%	10%	9%	11%	10%
Don't know	8%	5%	6%	4%	5%

Deterrents from buying and selling illicit tobacco

Key Information

- Slightly fewer respondents (22%) believe that there are sufficient deterrents to stop people buying and selling illegal tobacco than last year (24%).
- However, almost 50% of respondents believe that there are sufficient legal deterrents to buying and selling illegal tobacco.
- Only one in ten respondents has seen any recent media about the dangers of illicit tobacco.

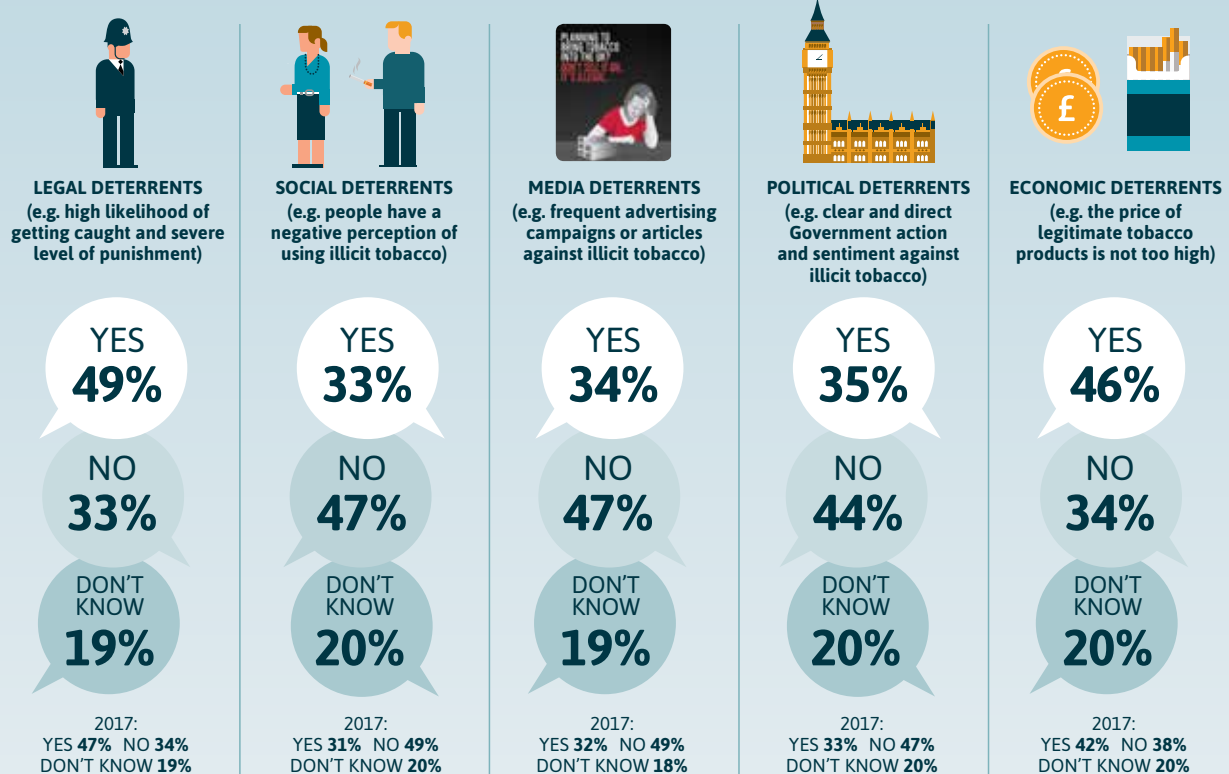
Do you think there are sufficient deterrents – e.g. legal, social, etc. to dissuade or prevent people from selling and/or buying illicit tobacco products?

BASE: 12,010 | ALL INTERVIEWS



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

BASE: 12,010 | ALL INTERVIEWS



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

BASE: 12,010 | ALL INTERVIEWS

