

# TMA Anti-Illicit Trade (AIT) Poll 2015 UK Report



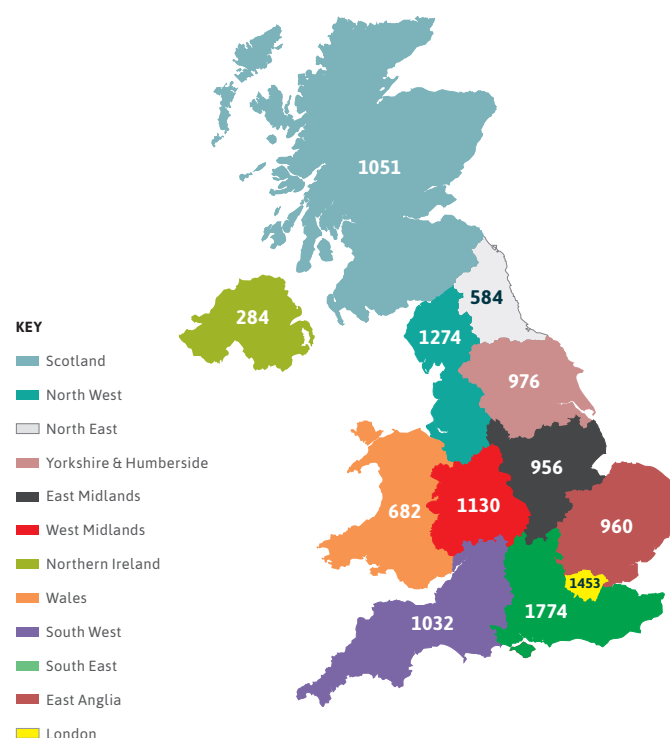
## Introduction

In June 2015, the TMA commissioned a nationwide online survey into adult smokers' (18+) awareness, behaviour and attitudes towards illicit tobacco. The questions received input from HM Revenue and Customs and other stakeholders, such as the media. The survey of 12,156 smokers was conducted online. The 2015 results supplement those of a similar survey that the TMA conducted in 2014.

## Key Findings

- 71%** of adult smokers never buy from non-shop sources
- 29%** that buy from non-shop sources cite:  
'abroad', 'friends & family', 'in the street' and 'pubs'
- 19%** of adult smokers are aware of illicit tobacco being sold in their area although only 1 in 7 of these reported it to the authorities
- 58%** who have not reported illegal tobacco said they did not do so, as it was "none of their business"

## 2015 Survey



Survey total 12,156

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

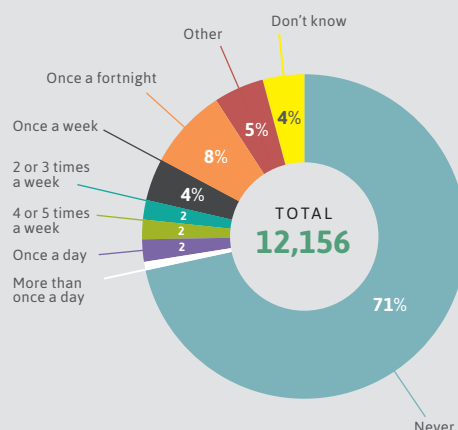
## Purchasing Behaviour

### Where do you buy your tobacco products?

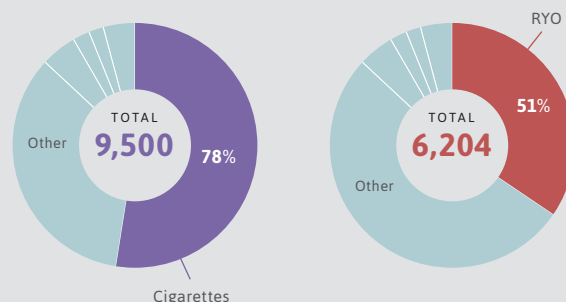
LOCATION	WHOLE		CIGARETTES / RYO	
	COUNTS	COL %	CIG %	RYO %
Corner shops/newsagents	8,117	67%	69%	69%
Supermarkets	9,580	79%	81%	78%
Markets or car boot sales	351	3%	3%	4%
Vans (e.g. Ice cream vans)	191	2%	2%	2%
Workplace	273	2%	3%	3%
Private houses (so-called 'fag houses')	264	2%	2%	3%
From friends and family	899	7%	7%	11%
Abroad	2,114	17%	18%	18%
Internet	562	5%	5%	6%
Pubs	551	5%	5%	6%
People in the street (ie: individuals in public place not listed above)	131	1%	1%	2%
Other (please specify)	152	1%	1%	1%
Don't know	20	0%	0%	0%
<b>Total</b>	<b>23,205</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### How often do you buy tobacco from 'non-shop' sources – e.g. friends, in the street, from market stalls?

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING

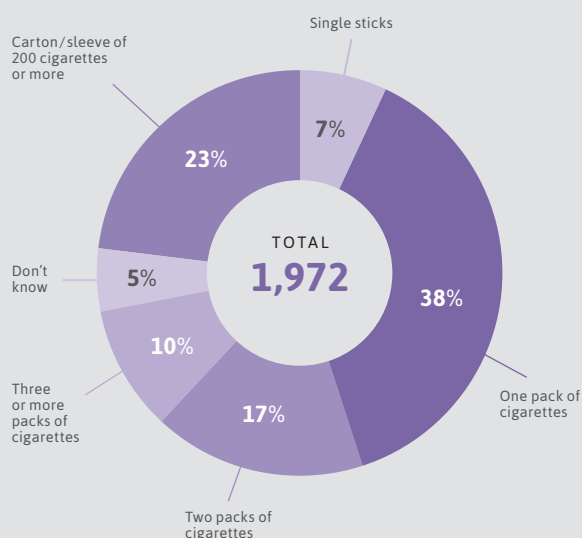


### Which of the following do you smoke at all nowadays?



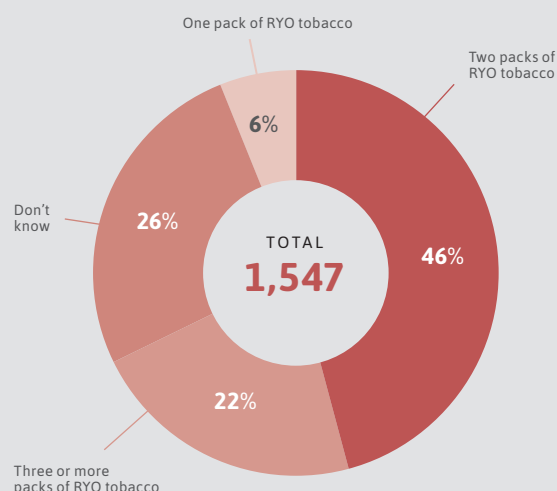
### On each occasion you purchase cigarettes from a 'non-shop' source, how much do you buy?

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING



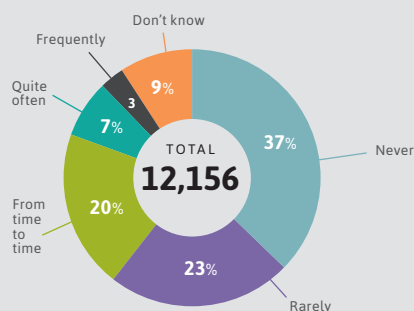
### On each occasion you purchase RYO from a 'non-shop' source, how much do you buy?

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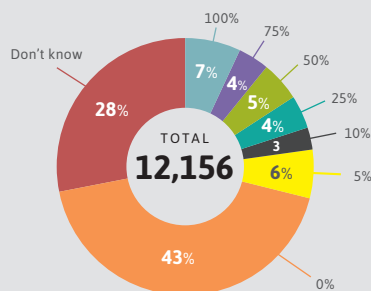


# Purchasing Behaviour

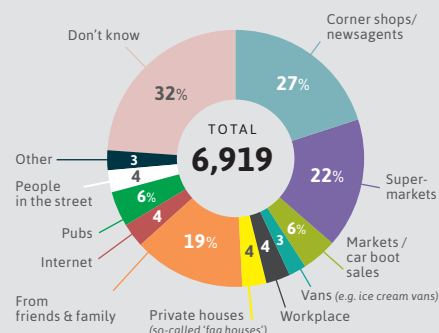
## Non-UK Duty Paid Penetration



How often in the UK have you seen or been offered for sale what you believe to be UK brand cigarettes/tobacco (of the type that you see in the shops) that did not carry the marking 'UK Duty Paid'?



If you have purchased what you believe to be UK brand cigarettes/tobacco that did not carry the marking 'UK Duty Paid', what proportion are they of the tobacco/cigarettes you consume per day?



If you have purchased what you believe to be genuine UK brands that did not carry the marking 'UK Duty Paid', where/from whom did you buy them?

### Have you seen any of the following known 'non-shop' brands sold or smoked?

NON-SHOP BRANDS	CIGARETTES		RYO	
	COUNTS	COL %	COUNTS	COL %
Bon	442	5%	324	5%
Business Royals	779	8%	524	8%
Domingo	537	6%	498	8%
Eastender	481	5%	435	7%
em@il	420	4%	296	5%
Fest	358	4%	225	4%
Golden Medway	489	5%	360	6%
Gold Mount	812	9%	569	9%
JIM	665	7%	450	7%
Jin Ling	1,102	12%	736	12%
Master	541	6%	332	5%
MG	594	6%	380	6%
No 1/7	355	4%	233	4%
Palace	821	9%	556	9%
Park	1,080	11%	739	12%
President	1,012	11%	628	10%
Raquel	577	6%	398	6%
Richman	1,741	18%	1275	21%
The Turner	460	5%	440	7%

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

NON-SHOP BRANDS	CIGARETTES		RYO	
	COUNTS	COL %	COUNTS	COL %
Bon	201	45%	136	42%
Business Royals	247	32%	167	32%
Domingo	196	36%	187	38%
Eastender	195	41%	172	40%
em@il	173	41%	120	41%
Fest	147	41%	90	40%
Golden Medway	179	37%	123	34%
Gold Mount	248	31%	153	27%
JIM	224	34%	131	29%
Jin Ling	486	44%	299	41%
Master	228	42%	133	40%
MG	190	32%	123	32%
No 1/7	159	45%	84	36%
Palace	274	33%	181	33%
Park	242	22%	155	21%
President	247	24%	143	23%
Raquel	215	37%	139	35%
Richman	521	30%	357	28%
The Turner	213	46%	216	49%

## Illicit White Penetration: Jin Ling

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING



## Awareness and Reporting

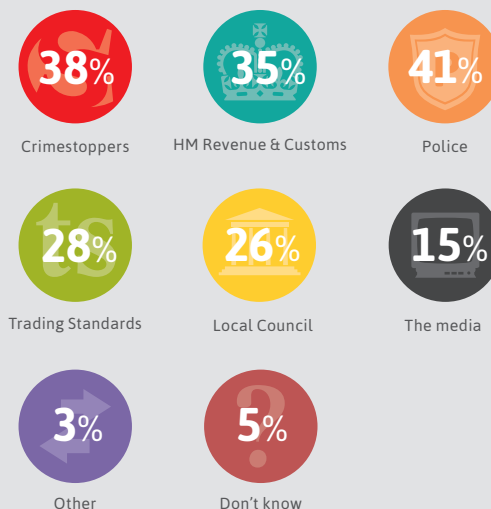
Are you aware of illicit tobacco products (UK tax has not been paid) being sold in your area?

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING



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

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING



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

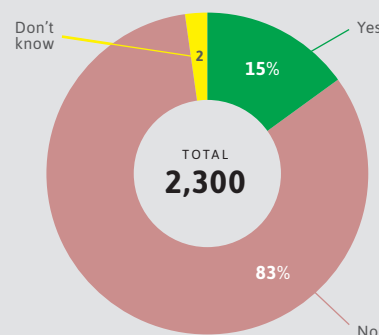
BASE: 12,156

**87%** of those who buy a 20 pack of non-shop cigarettes paid **less than £5**

**70%** of those who buy a 50g pouch of RYO tobacco purchase it for **less than £8**

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

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING



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

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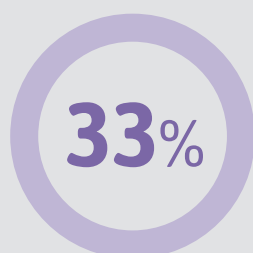
**20%** I didn't know who to tell

I was afraid to tell anyone in case I got in to trouble **18%**

**58%** It's none of my business

In the UK have you ever seen or been offered what you believe to be non-UK brands?

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING



cigarette smokers answered "yes"



RYO smokers answered "yes"

If so, where have you seen these tobacco products sold?

	CIGARETTES		RYO	
	COUNTS	COL %	COUNTS	COL %
Corner shops/newsagents	622	35%	405	30%
Markets or car boot sales	509	28%	355	26%
Vans (e.g. Ice cream vans)	210	12%	126	9%
Workplace	280	16%	223	17%
Private houses (so-called 'fag houses')	393	22%	323	24%
From friends and family	373	21%	313	23%
Internet	252	14%	161	12%
Pubs	576	32%	466	35%
People in the street	414	23%	384	29%
Other	35	2%	29	2%
Don't know	81	5%	48	4%

## Deterrents

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

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING

**YES** 54%

**No** 25% | **don't know** 21%

Would reading an article about illicit tobacco in your local paper encourage you to report information about dealers?

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING

**YES** 37%

**No** 33% | **DON'T KNOW** 30%

Do you think there are sufficient deterrents to dissuade or prevent people from selling illicit tobacco products?

GROUP	yes	no	don't know
Legal Deterrents	31%	41%	28%
Social Deterrents	23%	49%	28%
Media Deterrents	23%	51%	26%
Political Deterrents	24%	49%	28%
Economic Deterrents	26%	48%	26%

Which of the following statements do you agree with:

GROUP	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 & family, providing I don't charge them more than I paid for it.	50%	50%
I have no idea what restrictions there are on how many cigarettes / tobacco I can legally bring into the UK.	47%	53%
I plan to buy tobacco products abroad and bring back as many cigarettes / tobacco as I legally can.	51%	49%
I know where to find the rules to tell me how much tobacco I can bring back into the UK from abroad.	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%

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

GROUP	CIG	RYO	CIG	RYO	CIG	RYO	CIG	RYO	CIG	RYO
	agree strongly		agree slightly		no opinion		disagree slightly		disagree strongly	
I have no objections to buying non-UK duty paid tobacco for myself as long as it is from a legal source.	57%	57%	21%	22%	15%	16%	3%	3%	4%	4%
I have no objections to buying non-UK duty paid tobacco.	18%	21%	22%	23%	28%	28%	14%	13%	18%	14%
I am nervous about buying non-UK duty paid cigarettes/tobacco in case the product is counterfeit.	32%	30%	28%	29%	23%	23%	9%	10%	7%	7%
I don't buy non-UK duty paid product as I think that they taste different to UK bought cigarettes/tobacco.	18%	19%	20%	19%	37%	37%	15%	16%	10%	10%

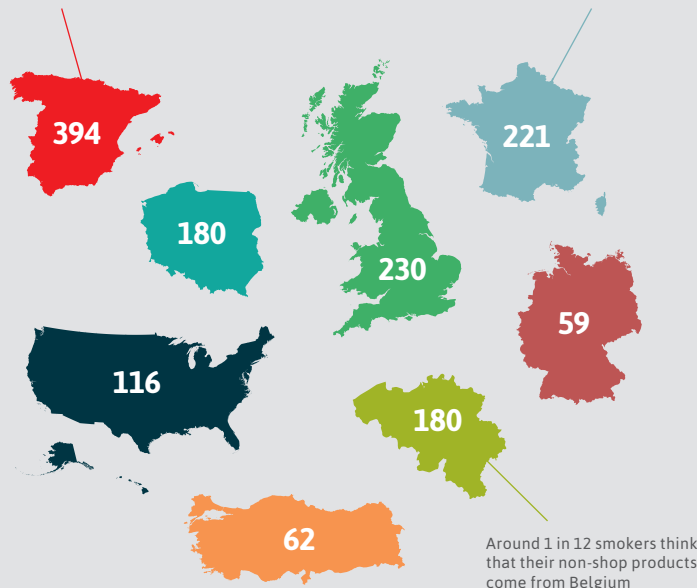
## In Brief

Please state the country you think the 'non-shop' brands that you buy typically come from:

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING

Around 1 in 5 smokers think their non-shop products come from Spain

Around 1 in 10 smokers think that their non-shop products come from France



Spain France Poland Turkey  
UK Belgium USA Germany

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING

# 80%

of respondents mentioned 'cheap', 'cheaper', 'price', 'cost', 'money' and 'value' when asked what motivates them to buy non-shop products.

# 14%

of smokers surveyed said they had bought illegal cigarettes / tobacco in the UK?

14% of respondents were also unsure whether tobacco they had bought from a shop was a legitimate or smuggled product?

# 4%

of respondents recall having seen articles about the dangers of illicit tobacco in the media in their local area

# 12%

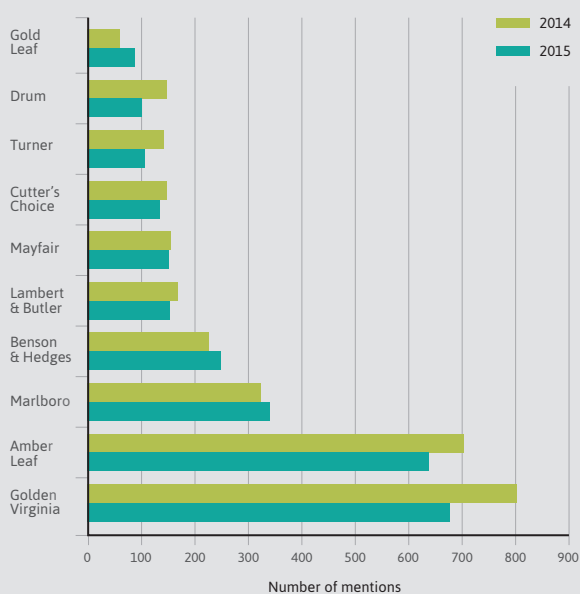
of smokers surveyed were aware of under 18s buying or selling illicit tobacco locally within the last year?

# 35%

of smokers also use e-cigarette products

Please provide examples of the brands that you typically buy from 'non-shop' sources?

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING



Have you ever bought illegal cigarettes/tobacco in the UK?

BASE: 12,156 | ALL INTERVIEWS | NO WEIGHTING

