

# Wales Illegal Tobacco Study Adults and Young People 2022

## Introduction

This paper presents the key findings from the Wales Illegal Tobacco Study (NEMS 2022). Where applicable, comparisons are made to previous research (NEMS 2014).

The adult survey was comprised of 738 interviews, of which 173 participants were illegal tobacco buyers. Sampling took place across all 22 Welsh authority areas, among adults aged 16+. There was a complementary mix of telephone, face-to-face in-street and online interviewing. Fieldwork was among current smokers only. Data was weighted based on national smoking prevalence figures for each gender-age, sub-set.

The young person's survey was comprised of 1,223 responses from 11-21-year-olds. Participants were from across Wales. The survey used an online self-completion methodology, which was incentivised. The sample holds a mixture of smokers and non-smokers. This page presents comparisons between the total sample of 11 to 21-year-olds (n=1,223) and a smaller sample of 11 to 16-year-olds (n=1,022).

## Objectives

The Wales-wide survey was designed to provide a better understanding of the cheap tobacco market, product users and attitudes towards illegal tobacco in Wales.

The adult survey provided an updated assessment of the illegal tobacco market in Wales, comparing like-for-like metrics against a study carried out in 2014. The young person's survey provided baseline data and was first extensive survey of illegal tobacco and young in Wales and the largest of its kind in the UK to date.

The adult survey explored:

- Smoking behaviour and attitudes
- Illegal tobacco awareness and encounters
- Illegal tobacco purchase and volume share
- Attitudes towards illegal tobacco
- Campaign awareness and likelihood to report

The young person survey explored:

- Smoking behaviour
- Illegal tobacco awareness and encounters
- Illegal tobacco purchasing
- Illegal tobacco attitudes and reports

## Key Findings

### Adult Survey

- The illegal tobacco volume market share is **10%** in 2022 a decrease from **12%** in 2014.
- 4 out of 10 smokers (**40%**) have ever been offered illegal tobacco in Wales – unchanged since 2014.
- 9 out of 10 who are offered illegal tobacco will go on to try it, of which two-thirds will go on to become buyers.
- A quarter of current smokers purchase illegal tobacco and this makes up on average **30%** of their entire tobacco consumption.
- The most prevalent channel for illegal tobacco is a private address (**39%**). Followed by pubs/clubs where there was a notable decrease in purchases (**33%** 2014 vs **19%** 2022). Purchases in shops remained unchanged (**11%**), however there was a notable increase in availability.
- The profile of illegal tobacco buyers between 2014 and 2022 is now less skewed towards lower socio-economic groups.
- There are an estimated 88,000 illegal tobacco buyers across Wales in 2022.
- Weekly tobacco consumption levels have decreased by around a third since 2014, while the costs of smoking have remained static.
- Prevalence of hand-rolling tobacco has increased by almost 50% between 2014 and 2022 from **39%** up to **57%**.

### Young Person's Survey

#### 11 to 16-year-olds

- Over half of all 11 to 16-year-olds had heard of illegal tobacco (**54%**).
- Of the **7%** current smokers, **52%** smoked daily and **41%** smoked cannabis.
- **34%** of current smokers had ever been offered illegal tobacco, and **24%** had bought it when offered
- Of those that had been offered illegal tobacco 89% went on to buy it
- Over a third (**36%**) of current smokers had tried illegal tobacco
- A quarter (**25%**) of all current smokers had ever bought illegal tobacco.
- The most prevalent channel for illegal tobacco is friends/ family (**39%**), followed by educational settings **17%** and shops **11%**.

#### 11 to 21-year-olds

- Over half of all 11 to 21-year-olds had heard of illegal tobacco (**54%**) rising **72%** of current smokers.
- Of the **12%** of current smokers, **64%** smoked daily and **34%** smoked cannabis.
- **42%** of current smokers had ever been offered illegal tobacco, and **21%** had bought it when offered.
- Of those that had been offered illegal tobacco **86%** went on to buy it.
- **38%** of current smokers had tried illegal tobacco.
- A quarter (**23%**) of all current smokers had ever bought illegal tobacco.
- The most prevalent channel for illegal tobacco is friends/ family (**38%**), followed by shops **25%** and educational settings (**7%**).

### Smoking Behaviour

- Smoking remains more prevalent among those from the lower half of the socio-economic spectrum (**62%** of smokers) yet has increased in popularity among ABC1s since 2014 (**25%** 2014 up to **33%** in 2022).
- Weekly tobacco consumption levels have decreased by around a third since 2014 (90 down to 60), while the cost of smoking has remained static at £36 a week.
- Older smokers are consuming more tobacco than younger adult smokers (by around a third).
- Prevalence of hand-rolling tobacco has increased by almost **50%** between 2014 and 2022 from **39%** up to **57%**.
- 1 in 5 smokers (**19%**) use e-cigs, with their popularity being almost 3-times as high among younger adult smokers than older smokers.

### Smoker Attitudes

- More than two-thirds of smokers (**68%**) felt it was very important that young people not take up smoking.
- Only a third of smokers had no concern about their smoking (**34%**), while almost a quarter claimed to be very concerned (**23%**).
- More than half (**55%**) had a lot of regret about taking up smoking, with only **15%** having no regret at all.
- Majority (**60%**) of smokers have had multiple failed quit attempts, with only **21%** having never attempted to quit.
- Desire to quit was high and directly linked to the level of concern about smoking.
- Overall, there has been little change in smoking attitudes since 2014.

### Illegal Tobacco Encounters

- Compared to previous years (2014), there was a slight decrease in illegal tobacco awareness levels among smokers in 2022 – largely attributed to males and younger smokers (**84%** 2014 down to **81%** in 2022).
- 4 out of 10 smokers have ever been offered illegal tobacco in Wales.
- Illegal tobacco offers are less frequent in 2022, however a quarter of those receiving such offers do so on a frequent basis.
- Pubs (**50%**), private residence (**50%**) and street (**41%**) are the leading avenues of illegal tobacco offers.
- Illegal tobacco being touted in shops (mainly independent corner shops) has increased notably since 2014 from **11%** up to **23%** in 2022.
- Profile of those targeted by sellers broadly matches that of smokers in general.

### Illegal Tobacco Prevalence

- Comparing 2022 results to the 2014 results, there was no real change in the level of illegal tobacco offers, willingness to try and/or buy illegal tobacco.
- 9 out of 10 who are offered illegal tobacco will go on to try it, of which two-thirds will go on to become buyers.
- Only one percentage point difference in illegal tobacco purchase prevalence between studies – **24%** in 2022 vs **23%** in 2014.

- However, the profile of illegal tobacco buyers between 2014 and 2022 has changed in terms of demographics and smoking habit.
- An estimated 88,000 illegal tobacco buyers across Wales in 2022.

### Illegal Tobacco Purchase

- Notable change in the type of illegal tobacco purchase with an increase in counterfeit and fake tobacco products and an increase in foreign brands not normally sold in the UK.
- There was a decrease in UK purchase but cheaply priced from **71%** in 2014 down to **44%** in 2022.
- Main channel of illegal tobacco purchase in 2022 is from a friend / family member (**33%**), followed by pub / club (**19%**).
- Private address has increased since 2014 while pubs / clubs has decreased notably (from **33%** 2014 down to **19%** 2022), and shops remains unchanged (**11%**).
- Once established, illegal tobacco buyers will keep using the same seller.
- Illegal tobacco is typically bought in packs of 20 cigarettes or 50g pouches and usually offers a saving of **50%** or more from the RRP.

### Illegal Tobacco Volume Share

- Those buying illegal tobacco on a weekly basis has decreased notably between 2014 and 2022. (**29%** in 2014 vs **17%** in 2022)
- As has the typical amount of illegal tobacco being smoked (as a proportion of legitimate purchase).
- The share of the overall tobacco market which can be attributed to illegal tobacco is estimated to have decreased from **12%** to **10%** between 2014 and 2022.

### Illegal Tobacco Buyer Attitudes

Several factors at play when determining why someone buys illegal tobacco:

- The leading factor is the not insignificant cost saving offered from illegal tobacco – often among those on the tightest of budgets.
- Social norm (i.e. everyone does it) and having a conveniently accessible and available channel of purchase also play their part.
- A potential barrier to illegal purchase can be the smoking experience / wiliness to accept a lower quality product.
- **63%** of illegal tobacco buyers say illegal tobacco facilitates their habit.

## Attitudes to Illegal Tobacco Sellers



- Illegal tobacco buyers viewed sellers in shops / street / pub less favourably than those they had a personal connection with.
- While preferring those close to them didn't sell illegal tobacco, they were most inclined to view them as not doing anyone any harm and/or providing a valuable service.
- Whereas shop sellers or those in the street were more likely to be viewed as a criminal and/or undermining legitimate retailers.

### Attitudes towards the sale of Illegal Tobacco

- Some encouraging shifts since 2014 in terms of attitudes towards illegal tobacco: among both buyers and non-buyers.
- Most notably a shift amongst non-buyers in terms of illegal tobacco's harm, and importance.
- Despite this, there was less consensus about any criminal links to the trade of illegal tobacco – especially among buyers.
- Non-buyers focused more on the harm it can cause as opposed to any criminal links.

### Illegal Tobacco Campaign Awareness

- **29%** of smokers sampled had ever seen any campaign activity around the topic of illegal tobacco. This reduced to **15%** for the last 12 months.
- Leading message recall was around the harmful content of illegal tobacco (1 in 3), although more than 1 in 10 could not recall any message out-take.

### Reporting of Illegal Tobacco Trading

- Reporting the sale of illegal tobacco was seen to increase dramatically once any impact on children were considered.
- **56%** of all respondents said they would be likely to report if children were targeted.
- Likelihood to report has shown encouraging shifts since 2014.
- Police continue to be the go-to recipients of illegal tobacco reports (**74%**), trading standards **7%** and don't know **14%**.
- Maintaining anonymity and making it easy to report were the leading encouraging factors among those unlikely to report.

## Wales Illegal Tobacco Study (Young Persons) - Key Metrics

	11–21 year-olds	11–16 year-olds
Total sample	<i>n</i> = 1223	<i>n</i> = 1022
Current smokers	<i>n</i> = 151	<i>n</i> = 67
Current smokers, illegal tobacco buyers	<i>n</i> = 36	<i>n</i> = 18
<b>Smoking background</b>		
Ever smoked	22%	12%
Currently smoke	12%	7%
Regret about starting smoking: A lot (current smokers)	29%	16%
Regret about starting smoking: None (current smokers)	27%	34%
<b>Smoking habit (current smokers)</b>		
Smoke daily	64%	52%
Smoke less than daily, but at least once a week	15%	18%
Smoke less often than once a week	21%	30%
Cigarette smokers	70%	63%
Hand-rolling tobacco smokers	58%	58%
Cannabis smokers	34%	41%
E-cigs / vaping smokers	77%	83%
<b>Illegal tobacco awareness</b>		
Seen any messaging around illegal tobacco in last 12 months	17%	17%
Heard of illegal tobacco	54%	54%
Heard of illegal tobacco (current smokers)	72%	62%
<b>Illegal tobacco offers</b>		
Ever been offered illegal tobacco	11%	8%
Ever been offered illegal tobacco (current smokers)	42%	32%
Those who have bought illegal tobacco when offered (current smokers)	21%	24%
Frequency of purchase when offered (illegal tobacco buyers)	86%	89%
<b>Illegal tobacco buying</b>		
Tried illegal tobacco	6%	2%
Tried illegal tobacco (current smokers)	38%	36%
Ever bought illegal tobacco	4%	2%
Ever bought illegal tobacco (current smokers)	23%	25%
Normal channel of illegal tobacco: shop (illegal tobacco buyers)	25%	11%
Normal channel of illegal tobacco: friend / family member (illegal tobacco buyers)	36%	39%
Normal channel of illegal tobacco: educational setting (illegal tobacco buyers)	8%	17%
Buy illegal tobacco at least weekly (illegal tobacco buyers)	25%	39%
Buy illegal tobacco no more than 3-times a year (illegal tobacco buyers)	33%	17%
<b>Illegal tobacco attitudes</b>		

Agree: Illegal tobacco enables to me smoke because they are easier to get hold of (illegal tobacco buyers)	44%	50%
Agree: Illegal tobacco enables to me smoke because they are cheaper (illegal tobacco buyers)	53%	55%
Agree: Buying illegal tobacco is a big deal	66%	58%
Agree: Buying illegal tobacco is a big deal (current smokers)	27%	10%
Agree: Buying illegal tobacco is a big deal (illegal tobacco buyers)	11%	6%
Agree: Most smokers around here buy illegal tobacco (current smokers)	24%	27%
Agree: Most smokers around here buy illegal tobacco (illegal tobacco buyers)	50%	60%
<b>Reporting the sale of illegal tobacco</b>		
Very likely to report	11%	11%
Not at all likely to report	24%	22%
Would report to the police	47%	50%
Would report to parents	27%	30%
Unsure whom to report to	22%	22%