



Special Eurobarometer 482

Report

Public perception of illicit tobacco trade

Fieldwork
December 2018
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Survey requested by the European Commission,
European Anti-Fraud Office
and co-ordinated by the Directorate-General for Communication

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The interpretations and opinions contained in it are solely those of the authors.

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Special Eurobarometer 482

Report

Public perception of illicit tobacco trade

December 2018

Survey conducted by Kantar on behalf of Kantar Belgium
at the request of the European Commission, European Anti-Fraud Office

Survey co-ordinated by the European Commission, Directorate-General for Communication
(DG COMM "Media monitoring and Eurobarometer" Unit)

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INTRODUCTION

The illicit tobacco trade continues to be a major concern for the European Union and its Member States. It is harmful to the well-being of our society in many ways, e.g. fiscal, health and security. The illicit trade in tobacco is dominated by organised crime gangs and causes a loss to public revenues of the EU and Member States of about €10 billion every year.

The first EU Strategy to tackle this phenomenon was issued in 2013¹ and supplemented by an Action Plan (2013-2017)². In 2016 and 2017 stock-taking exercises took place including a Progress Report from the European Commission³, which largely matched the related Council Conclusions from Member States of December 2016. The findings of a public conference involving a wide range of stakeholders (e.g. European Commission, European Parliament, European Economic & Social Committee⁴, NGOs, enforcement services, academics and industry) in March 2018 generally supported the conclusions of the Progress Report.

The findings from the evaluation phase led to three main conclusions namely that the threat from the illicit tobacco trade is still present, the 2013 Strategy remains valid and a need to up-date the tools to keep-up with the ever-changing threat from the illicit tobacco trade. A 2nd Action Plan⁵, based on these conclusions, was adopted by the European Commission in December 2018. It sets out 50 actions to be implemented individually and jointly by the EU or Member States, before the end of 2022. The actions focus on engaging leading sources and transit countries; limiting supply; enhancing analyses & intelligence; as well as limiting demand. One action⁶ aimed at limiting demand is to follow-up the first survey on the public perception of illicit tobacco trade conducted in 2015 (Special Eurobarometer 443 of July 2016).

At the Stakeholder Conference in March 2018 the observation was made, for example, that the demand for black market cigarettes would likely fall if the public knew of the direct link to organised crime. Yet, it was recognised that the public was to some extent unaware of this link, as shown by the first Eurobarometer survey (Special Eurobarometer 443) on public perceptions of the illicit tobacco trade in 2015.

The current survey updates the results of the survey in 2015, focusing on the following topics:

- The penetration of the black market for cigarettes, and locations where transactions take place;
- The price difference between black market and legal cigarettes;
- The public's ability to distinguish black market cigarettes from legal cigarettes;
- Reasons for smoking black market cigarettes;
- Views on the main problems of the black market in cigarettes;
- Perceptions of the key revenue sources of organised crime groups.

The findings of the current survey are public. It will furthermore be shared with Member States experts involved in fighting the illicit tobacco trade and other stakeholders. To encourage the use of the findings of this survey another Action⁷ in the 2nd Action Plan foresees the providing of *a platform allowing Member States to exchange good practices with awareness raising campaigns focussing on the risks associated with buying illicit tobacco products*. The aim is that the findings of the survey will support follow-up awareness activities at national level.

¹ COM(2013) 324 final of 6 June 2013

² SWD(2013) 324 final of 6 June 2013

³ COM(2017) 235 final of 12 May 2017

⁴ <https://www.eesc.europa.eu/en/agenda/our-events/events/fighting-illicit-tobacco>

⁵ COM(2018) 846 final of 7 December 2018

⁶ Action C1.1

⁷ Action C1.2

This survey was carried out by the Kantar network in the 28 EU Member States between the 4th and 20th of December 2018. Some 27,643 respondents from different social and demographic groups were interviewed face-to-face at home in their mother tongue. The survey was commissioned by the European Anti-Fraud Office (OLAF).

The methodology used is that of the Standard Eurobarometer surveys carried out by the Directorate-General for Communication (“Media monitoring and Eurobarometer” Unit)⁸. It is the same for all countries and territories covered in the survey. A technical note on the manner in which interviews were conducted is appended as an annex to this report. Also included are the interview methods and confidence interval⁹.

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czechia	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Ireland	IE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Latvia	LV	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28

* Cyprus as a whole is one of the 28 European Union Member States. However, the ‘acquis communautaire’ has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the ‘CY’ category and in the EU28 average.

*We wish to thank the people throughout the European Union
who have given their time to take part in this survey.*

Without their active participation, this study would not have been possible.

⁸ <http://ec.europa.eu/commfrontoffice/publicopinion>

⁹ The results tables are annexed. It should be noted that the total of the percentages indicated in the tables in this report may exceed 100% when the respondent was able to choose several answers to the same question.

KEY FINDINGS

The loss of taxes for the state and revenue for organised crime are seen as the main problems of the black market in cigarettes

- The loss of taxes for the state is seen as one of the main problems of the black market in cigarettes (40%), while 38% mention revenue for organised crime, 33% the lack of quality control of these cigarettes, and 28% that it encourages smoking among young people by making cigarettes cheaper and easier to obtain.
- Results have remained broadly consistent with those seen in the 2015 survey.

Only a minority mention black market cigarettes as an important source of revenue for organised crime

- Around seven in ten respondents (71%) think that illegal drugs are one of the most important sources of revenue for organised crime, followed by prostitution and human trafficking (42%). Only 15% respondents mentioned black market cigarettes as one of the most important sources of revenue.
 - The proportion mentioning black market cigarettes as an important source of revenue for organised crime has remained stable since 2015.
 - Respondents in Lithuania (29%), Sweden (27%) and Poland (26%) are the most likely to say that black market cigarettes are an important source of revenue for organised crime.
 - Compared to 2015, the largest increase in the proportion saying black market cigarettes are an important source of revenue for organised crime is observed in Finland (+7 percentage points), while the largest decreases are seen in Hungary and Malta (both -8 pp).

The low price is by far the main reason for smoking black market cigarettes

- The low price is the most commonly mentioned reason for smoking black market cigarettes (75%), well ahead of the answer 'easy availability' (9%). While there is no change compared to the survey in 2015 at EU level, large increases can be observed in some Member States (e.g. the Netherlands, +31 pp).

Black market cigarettes are said to be at least 30% to 50% cheaper than legal cigarettes

- Among those who have been offered black market cigarettes, more than a third (37%) responded that they were at least 50% cheaper than legal cigarettes, and the same proportion (37%) said they were at least 30% cheaper.

The overall penetration of black market cigarettes has slightly decreased

- 17% of the respondents say that they have been offered black market cigarettes, including 2% who say that they are offered black market cigarettes at least once a week, 4% who are offered them once to three times a month, and 11% less than once a month.
 - The overall proportion that has ever been offered black market cigarettes has slightly decreased since 2015 (-2 pp).
 - Black market cigarettes have the highest penetration in Latvia (43% of respondents saying they have been offered them), Croatia (33%), Greece (29%), Lithuania (28%) and Bulgaria (25%). However, some of these countries have seen large falls in penetration since 2015, most notably Latvia (-13 pp).
 - The penetration of black market cigarettes is higher among unemployed people and those with financial difficulties.

Black market cigarettes are most likely to be offered on the street

- Around two third of respondents who have been offered black market cigarettes (67%) say they were offered them in the street. Respondents were less likely to have been offered them in a restaurant or bar (14%) or in a shop under the counter (10%).
- The offer of black market cigarettes via the Internet remains small for the EU as a whole (3%), but with an increase of 14 percentage points in the proportion who were offered them on the Internet in Austria.

Only a minority are confident that they could identify a packet of black market cigarettes

- Less than a third (31%) of all respondents are confident that they would be able to distinguish a packet of black market cigarettes from a legal packet, while the majority (58%) are not confident.
- Confidence is highest in Lithuania, Poland, Bulgaria, Romania, Hungary and Croatia, and lowest in the Netherlands, Sweden, France and Spain.
- Confidence is highest (58%) among current smokers.

I. PENETRATION OF THE BLACK MARKET IN CIGARETTES

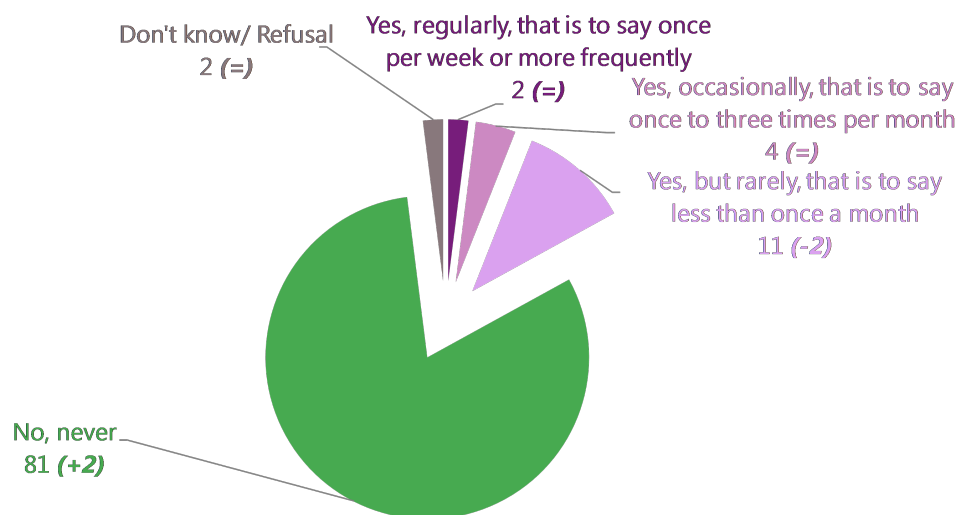
The first section of the report examines the penetration of the black market in cigarettes, by asking respondents whether they have ever been offered cigarettes from the black market and, if so, how often this occurs.

One in six Europeans have been offered black market cigarettes

One in six Europeans (17%) say that they have been offered black market cigarettes to buy or smoke¹⁰. This includes 2% who say they are offered black market cigarettes regularly (at least once a week), 4% who have been offered them occasionally (once to three times per month) and 11% who say this happens rarely (less than once a month). Around eight in ten respondents (81%) say that they have never been offered black market cigarettes, while the remaining 2% either don't know or refused to answer.

These findings are similar to those observed in the 2015 survey, although there has been a slight decrease in the overall penetration of black market cigarettes (-2 percentage points); specifically, a lower proportion say they are offered black market cigarettes 'rarely' (-2 pp), while there has been a corresponding rise in the proportion who say they have never been offered them (+2 pp).

QB3 Have you ever been offered black market cigarettes to buy or smoke?
(% - EU)



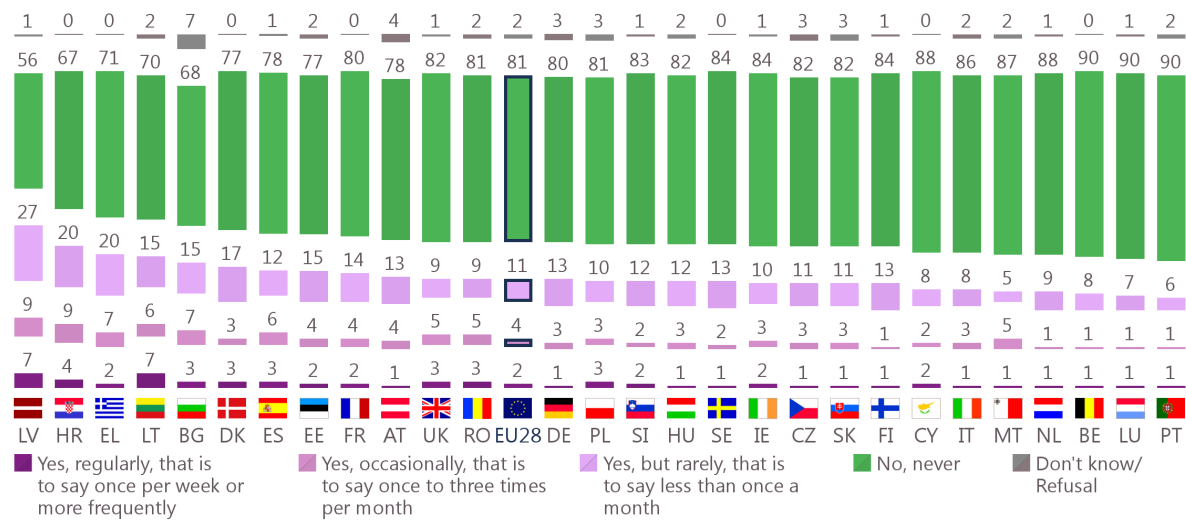
(Dec. 2018 - Nov.-Dec. 2015)

¹⁰ QB3: Have you ever been offered black market cigarettes to buy or smoke? No, never; Yes, but rarely, that is to say less than once a month; Yes, occasionally, that is to say once to three times per month; Yes, regularly, that is to say once per week or more frequently; Refusal (spontaneous); Don't know.

There is considerable variation by country in the penetration of black market cigarettes. Respondents in Latvia (43%) are the most likely to say that they have ever been offered black market cigarettes, as have at least a quarter of respondents in Croatia (33%), Greece (29%), Lithuania (28%) and Bulgaria (25%). By contrast, no more than one in ten respondents say that they have been offered cigarettes from the black market in Portugal (8%), Luxembourg (9%) and Belgium (10%).






























Although many countries have significant proportions of respondents who say that they have been offered cigarettes from the black market, most say they are only offered them rarely. Nonetheless, at least one in ten respondents are offered black markets cigarettes once a month or more in four countries: Latvia (16%), Lithuania and Croatia (both 13%) and Bulgaria (10%).

QB3 Have you ever been offered black market cigarettes to buy or smoke? (%)



Across the EU as a whole, there has been a slight decrease since 2015 in the proportion that say they have ever been offered cigarettes on the black market (-2 percentage points). There are 19 countries where there has been a decrease, most notably Latvia (43%, -13 pp), Hungary (16%, -12 pp), Ireland (15%, -10 pp) and Romania (17%, -10 pp). There has been no change in four countries, and an increase in the remaining five: Luxembourg (9%, +3 pp), Greece (29%, +2 pp), Denmark (23%, +2 pp), France (20%, +2 pp) and Italy (12%, +2 pp).






QB3 Have you ever been offered black market cigarettes to buy or smoke?
(%)

		Total 'Yes'	Dec. 2018 - Nov.-Dec. 2015	No, never	Dec. 2018 - Nov.-Dec. 2015	Don't know/ Refusal
EU28		17	▼ 2	81	▲ 2	2
LU		9	▲ 3	90	▼ 4	1
EL		29	▲ 2	71	▼ 1	0
DK		23	▲ 2	77	▼ 2	0
FR		20	▲ 2	80	▼ 2	0
IT		12	▲ 2	86	▼ 1	2
HR		33	=	67	▲ 2	0
ES		21	=	78	=	1
CY		12	=	88	▲ 1	0
BE		10	=	90	=	0
EE		21	▼ 1	77	▲ 1	2
SE		16	▼ 1	84	▲ 1	0
DE		17	▼ 2	80	▲ 2	3
SI		16	▼ 2	83	▲ 4	1
PT		8	▼ 2	90	=	2
CZ		15	▼ 3	82	▲ 2	3
SK		15	▼ 3	82	▲ 2	3
NL		11	▼ 3	88	▲ 3	1
AT		18	▼ 4	78	▲ 6	4
UK		17	▼ 4	82	▲ 3	1
FI		15	▼ 4	84	▲ 3	1
MT		11	▼ 5	87	▲ 3	2
LT		28	▼ 7	70	▲ 6	2
PL		16	▼ 7	81	▲ 9	3
BG		25	▼ 8	68	▲ 4	7
RO		17	▼ 10	81	▲ 10	2
IE		15	▼ 10	84	▲ 10	1
HU		16	▼ 12	82	▲ 12	2
LV		43	▼ 13	56	▲ 13	1

The **socio-demographic** analysis shows the following:

- Men are more likely than women to say that they have been offered black market cigarettes (22% vs. 12%).
- Respondents aged 25-54 are the most likely to have been offered black market cigarettes (22%), while the proportion is lowest among those aged 55 or over (11%).
- In terms of occupational groups, unemployed people are the most likely to say that they have been offered black market cigarettes (30%), while the proportion is also higher than average among self-employed people (23%).
- There is also a difference in relation to difficulties in paying bills: those who have difficulties most of the time are more likely to say they have been offered black market cigarettes than those who never or almost never have difficulties (28% vs. 14%).
- Respondents in large towns (21%) are more likely to say they have been offered black market cigarettes than those in small or mid-size towns (17%) or rural villages (15%).
- As might be expected, current smokers (34%) and former smokers (23%) are more likely to have been offered black market cigarettes than non-smokers (6%). Among current smokers, 4% say they are offered black market cigarettes regularly, 8% occasionally and 22% rarely.

QB3 Have you ever been offered black market cigarettes to buy or smoke?
(% - EU)

	Total 'Yes'	No, never	Refusal (SPONTANEOUS)	Don't know
EU28	17	81	1	1
 Gender				
Man	22	76	1	1
Woman	12	86	1	1
 Age				
15-24	17	82	1	0
25-39	22	77	0	1
40-54	22	76	1	1
55 +	11	87	1	1
 Socio-professional category				
Self-employed	23	75	1	1
Managers	17	82	0	1
Other white collars	19	79	1	1
Manual workers	20	78	1	1
House persons	10	89	0	1
Unemployed	30	69	0	1
Retired	11	87	0	2
Students	15	83	1	1
 Difficulties paying bills				
Most of the time	28	71	0	1
From time to time	21	77	1	1
Almost never/ Never	14	84	1	1
 Subjective urbanisation				
Rural village	15	83	1	1
Small/ mid size town	17	82	0	1
Large town	21	77	1	1
Smoker / Non-smoker				
Smoker	34	64	1	1
Past smoker	23	75	1	1
Non-smoker	6	92	1	1

II. WHERE DO CONSUMERS GET THEIR BLACK MARKET CIGARETTES?

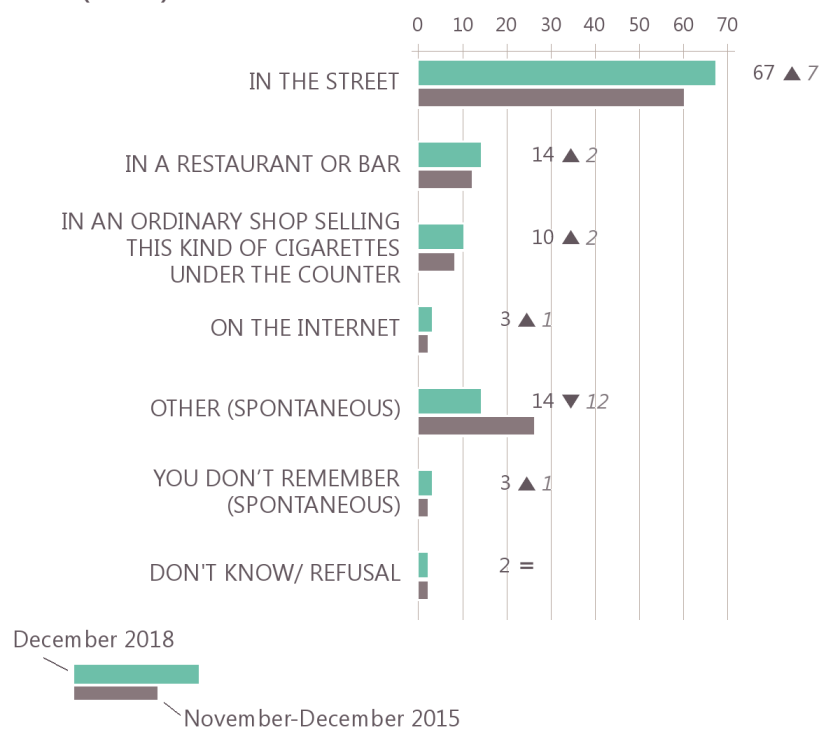
Those who said that they have been offered black market cigarettes were then asked where they were offered them¹¹.

Black market cigarettes are most likely to be offered in the street

Among respondents who said that they have ever been offered black market cigarettes, two thirds say they were offered them in the street (67%). One in seven (14%) say they were offered them in a restaurant or bar, and one in ten (10%) in an ordinary shop selling them under the counter. Only a very small proportion of these respondents say they were offered black market cigarettes on the Internet (3%), while one in seven (14%) say they were offered them somewhere else.

Compared with the 2015 survey, respondents in the current survey are more likely to say they were offered black market cigarettes in the street (+7 percentage points) and are less likely to mention 'other' locations (-12 pp).

QB4 Where were you offered this type of cigarettes?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: respondents who were offered black market cigarettes (n=4,713)

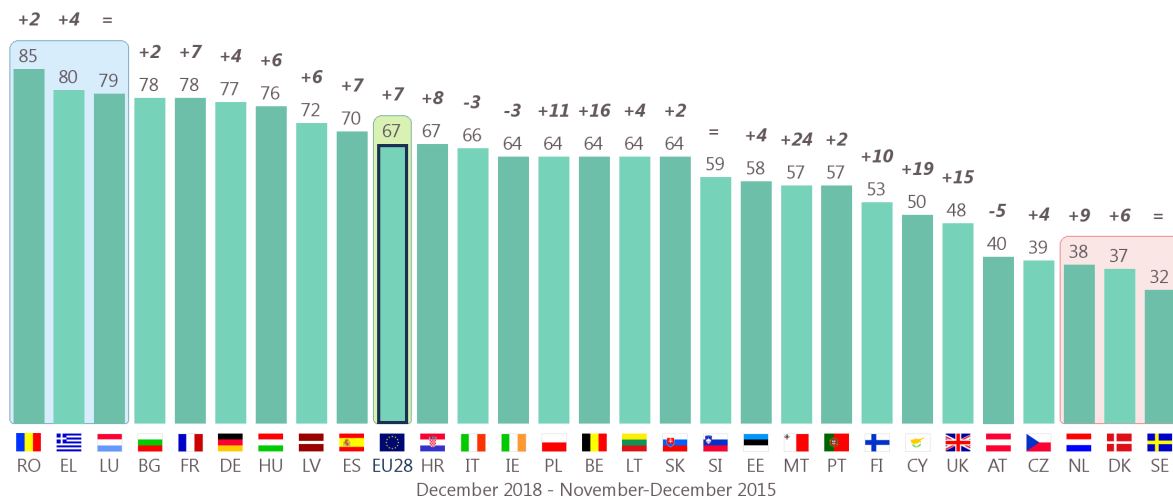
¹¹ QB4: Where were you offered this type of cigarettes? (Multiple answers possible) On the Internet; In an ordinary shop selling this kind of cigarettes under the counter; In the street; In a restaurant or bar; Other (SPONTANEOUS); You don't remember (SPONTANEOUS); Refusal (SPONTANEOUS); Don't know.

In all countries except one, respondents are most likely to say that they were offered black market cigarettes **in the street**¹². The one exception is Austria, where respondents are more likely to say they were offered them in a restaurant or bar than in the street.

In seven countries, more than three quarters of respondents who have been offered black market cigarettes say that they were offered them in the street: Romania (85%), Greece (80%), Luxembourg (79%), Bulgaria and France (both 78%), Germany (77%) and Hungary (76%). Respondents are least likely to have been offered black market cigarettes in the street in Sweden (32%), Denmark (37%), the Netherlands (38%), Czechia (39%) and Austria (40%).

Most countries show an increase since 2015 in the proportion that say they were offered black market cigarettes in the street. The largest increases can be seen in Malta (57%, +24 pp), Cyprus (50%, +19 pp), Belgium (64%, +16 pp), the United Kingdom (48%, +15 pp), Poland (64%, +11 pp) and Finland (53%, +10 pp). There has been no change in three countries: Luxembourg (79%), Slovenia (59%) and Sweden (32%). Decreases can be observed in Austria (40%, -5 pp), Italy (66%, -3 pp) and Ireland (64%, -3 pp).

QB4 Where were you offered this type of cigarettes? (MULTIPLE ANSWERS POSSIBLE)
(% - **IN THE STREET**)



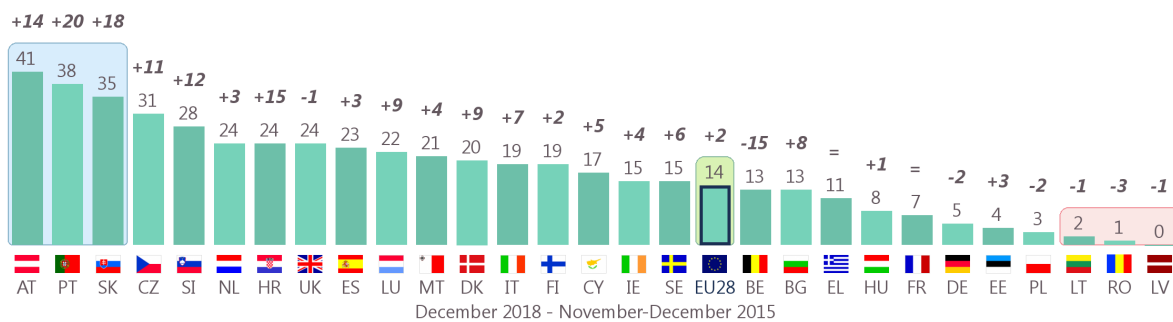
Base: respondents who were offered black market cigarettes (n=4,713)

¹² Care should be taken when analysing the results for Cyprus (n=58), Luxembourg (n=41), Malta (n=58) and Portugal (n=74) due to low sample sizes.

Respondents are most likely to say they were offered black market cigarettes **in a restaurant or bar** in Austria (41%), Portugal (38%), Slovakia (35%), Czechia (31%) and Slovenia (28%). By contrast, very few respondents say this in Latvia (no respondents), Romania (1%), Lithuania (2%), Poland (3%), Estonia (4%) and Germany (5%).

In 19 countries, there has been an increase since 2015 in the proportion saying they were offered black market cigarettes in a restaurant or bar, most notably Portugal (38%, +20 pp), Slovakia (35%, +18 pp), Croatia (24%, +15 pp) and Austria (41%, +14 pp). There are seven countries where there has been a decrease, by far the largest being in Belgium (13%, -15 pp).

QB4 Where were you offered this type of cigarettes? (MULTIPLE ANSWERS POSSIBLE)
(% - IN A RESTAURANT OR BAR)

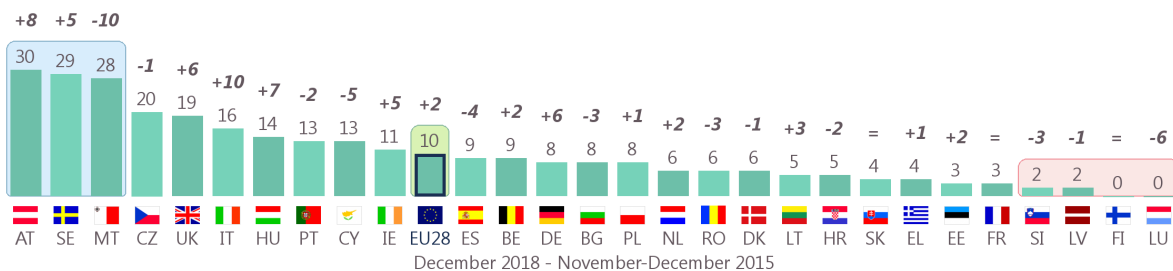


Base: respondents who were offered black market cigarettes (n=4,713)

Respondents in Austria (30%), Sweden (29%) and Malta (28%) are the most likely to say they were offered black market cigarettes **under the counter in an ordinary shop**. However, this applies to no respondents in Luxembourg and Finland and very few respondents in Latvia and Slovenia (both 2%).

The proportion that say they were offered black market cigarettes under the counter in an ordinary shop has increased in 13 countries, with the highest increases seen in Italy (16%, +10 pp), Austria (30%, +8 pp) and Hungary (14%, +7 pp). It has remained the same in three countries and decreased in 12, most notably Malta (28%, -10 pp) and Luxembourg (0, -6 pp).

QB4 Where were you offered this type of cigarettes? (MULTIPLE ANSWERS POSSIBLE)
(% - IN AN ORDINARY SHOP SELLING THIS KIND OF CIGARETTES UNDER THE COUNTER)

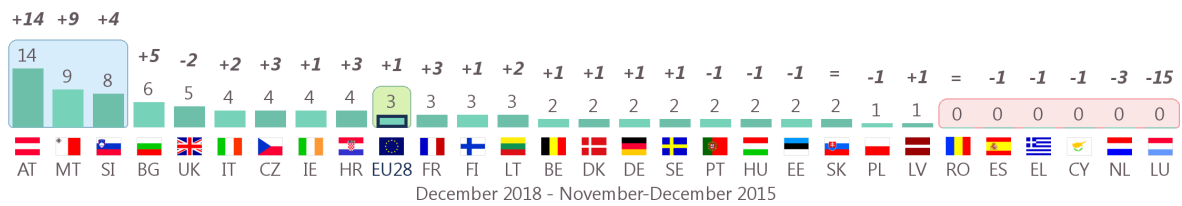


Base: respondents who were offered black market cigarettes (n=4,713)

In most countries, very few if any respondents say they have been offered black market cigarettes **on the Internet**. The highest proportions are seen in Austria (14%), Malta (9%) and Slovenia (8%).

There have been some large shifts since 2015, with large increases in Austria (14%, +14 pp) and Malta (9%, +9 pp) and a large decrease in Luxembourg (0, -15 pp).

QB4 Where were you offered this type of cigarettes? (MULTIPLE ANSWERS POSSIBLE)
(% - ON THE INTERNET)







Base: respondents who were offered black market cigarettes (n=4,713)

The **socio-demographic** analysis shows the following:

- Findings are broadly similar between men and women, although men are slightly more likely than women to have been offered black market cigarettes **in a restaurant or bar** (16% vs. 11%).
- Younger people (aged 15-24) are more likely than older people to have been offered black market cigarettes **in the street** (74% vs. 64%-66%), while those aged 25-39 (13%) and 40-54 (11%) are slightly more likely to have been offered them **in a shop** than those aged 15-24 (8%) or aged 55 or over (7%).
- There are no clear patterns by occupation or level of education, while those who have difficulties paying bills most of the time are more likely to have been offered black market cigarettes **in the street** (72%) compared with those who rarely or never have difficulties (65%).
- People living in rural villages are slightly less likely to have been offered black market cigarettes **in an ordinary shop** (6%) compared with those in small or mid-size towns (11%) and large towns (12%).
- There are no clear patterns when comparing current and former smokers with non-smokers.

QB4 Where were you offered this type of cigarettes? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)

	In the street	In a restaurant or bar	Other (SPONTANEOUS)	In an ordinary shop selling this kind of cigarettes under the counter	On the Internet	You don't remember (SPONTANEOUS)	Refusal (SPONTANEOUS)	Don't know
EU28	67	14	14	10	3	3	1	1
 Gender								
Man	67	16	14	10	2	2	1	1
Woman	65	11	14	9	3	3	1	1
 Age								
15-24	74	16	12	8	4	2	0	2
25-39	64	12	16	13	3	3	1	1
40-54	66	15	14	11	3	2	0	1
55 +	66	15	14	7	1	3	1	1
 Difficulties paying bills								
Most of the time	72	12	14	7	3	1	0	2
From time to time	67	16	12	14	3	2	1	0
Almost never/ Never	65	14	15	8	2	4	1	1
 Subjective urbanisation								
Rural village	66	16	16	6	2	3	2	1
Small/ mid size town	65	14	15	11	3	2	0	1
Large town	69	13	13	12	3	3	1	2

Base: respondents who were offered black market cigarettes (n=4,713)

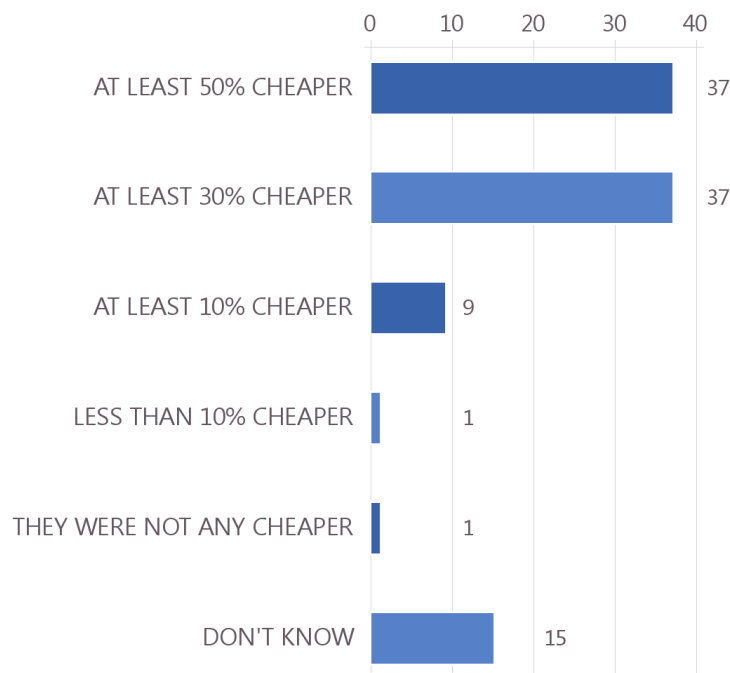
III. BLACK MARKET CIGARETTES VS LEGAL CIGARETTES: PRICE DIFFERENCE

This section examines the price difference between black market and legal cigarettes, according to the experience of respondents who have been offered cigarettes on the black market.

Three in four respondents say that black market cigarettes were at least 30% cheaper than legal cigarettes

Respondents who said they had been offered cigarettes on the black market were asked how much cheaper (if at all) they were than legal cigarettes¹³. More than a third (37%) say that the cigarettes they were offered were at least 50% cheaper than legal cigarettes, while the same proportion (37%) say that they were at least 30% cheaper. Less than one in ten (9%) say that they were at least 10% cheaper, while 1% say the difference was less than 10%, and 1% that there was no difference at all. The remaining 15% do not know.

QB5 Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes?
(% - EU)



Base: respondents who were offered black market cigarettes (n=4,713)

¹³ QB5: Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes? At least 50% cheaper; At least 30% cheaper; At least 10% cheaper; Less than 10% cheaper; They were not any cheaper; Don't know.






























In every country, the majority of respondents who were offered black market cigarettes say that these were at least 30% cheaper than legal cigarettes¹⁴. There are six countries where a majority say that the black market cigarettes were more than 50% cheaper: Greece (69%), Cyprus (66%) Finland and Ireland (both 56%) and Lithuania and the United Kingdom (both 52%). Respondents are least likely to say that black market cigarettes were more than 50% cheaper in Portugal (13%) and Austria and Romania (both 17%).

Respondents in Portugal are most likely to say that the black market cigarettes they were offered were at least 30% cheaper (63%), followed by those in Bulgaria (59%) and Romania (53%). Respondents in Italy (25%), Czechia (23%) and Austria (18%) are most likely to say that there was a price difference of at least 10%.

In Croatia (13%) and Sweden (12%), a relatively high proportion of respondents say that black market cigarettes were less than 10% cheaper or that there was no difference.

¹⁴ Care should be taken when analysing the results for Cyprus (n=58), Luxembourg (n=41), Malta (n=58) and Portugal (n=74) due to low sample sizes.

QB5 Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes?
(%)

		At least 50% cheaper	At least 30% cheaper	At least 10% cheaper	Less than 10% cheaper	They were not any cheaper	Don't know
EU28		37	37	9	1	1	15
BE		33	44	5	5	3	10
BG		22	59	6	2	1	10
CZ		27	40	23	1	3	6
DK		47	27	4	0	5	17
DE		40	38	4	0	1	17
EE		40	35	6	1	3	15
IE		56	26	4	3	2	9
EL		69	21	2	0	0	8
ES		31	32	11	2	4	20
FR		39	41	3	0	1	16
HR		20	49	15	9	4	3
IT		22	46	25	4	0	3
CY		66	20	5	0	5	4
LV		30	40	3	0	1	26
LT		52	36	3	0	0	9
LU		36	27	5	3	6	23
HU		35	48	6	0	1	10
MT		37	27	10	3	0	23
NL		43	31	4	0	2	20
AT		17	45	18	2	2	16
PL		40	39	10	0	0	11
PT		13	63	6	3	0	15
RO		17	53	12	2	0	16
SI		27	45	11	1	3	13
SK		34	49	10	1	0	6
FI		56	25	4	0	3	12
SE		32	30	7	2	10	19
UK		52	19	7	0	0	22

Highest percentage per country

Lowest percentage per country

Highest percentage per item




Lowest percentage per item

Base: respondents who were offered black market cigarettes (n=4,713)

Findings are generally consistent across the various **socio-demographic** groups:

- Men and women are equally likely to say that the black market cigarettes they were offered were at least 50% cheaper than legal cigarettes (both 37%), although men are slightly more likely than women to say that they were at least 30% cheaper (39% vs. 34%).
- Younger respondents (aged 15-24) are less likely than older respondents to say that the black market cigarettes were at least 50% cheaper (32% vs. 36%-40%), but were more likely to say that they were at least 30% cheaper (41% vs. 34%-38%).
- Respondents who left education at the age of 20 or above are more likely to say that the black market cigarettes were at least 30% cheaper (39% vs. 31% of those who left education by the age of 15), but are less likely either to say they were at least 50% cheaper (34% vs. 41%) or that they were at least 10% cheaper (6% vs. 12%).
- The main difference between smokers and non-smokers is in the proportion of don't know answers: 8% among current smokers and 12% among former smokers, compared with 38% among non-smokers. As a result, a higher proportion of current and former smokers say that the black market cigarettes were at least 50% cheaper (41% and 38% respectively, compared with 27% of non-smokers).

QB5 Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes?
(% - EU)

	At least 50% cheaper	At least 30% cheaper	At least 10% cheaper	Less than 10% cheaper	They were not any cheaper	Don't know
EU28	37	37	9	1	1	15
 Gender						
Man	37	39	8	1	1	14
Woman	37	34	10	1	2	16
 Age						
15-24	32	41	9	1	2	15
25-39	36	37	9	1	2	15
40-54	40	38	7	1	1	13
55 +	38	34	9	1	1	17
 Education (End of)						
15-	41	31	12	1	1	14
16-19	40	37	9	1	1	12
20+	34	39	6	1	2	18
Still studying	29	37	10	2	2	20
Smoker / Non-smoker						
Smoker	41	41	8	1	1	8
Past smoker	38	37	10	1	2	12
Non-smoker	27	26	5	1	3	38

Base: respondents who were offered black market cigarettes (n=4,713)

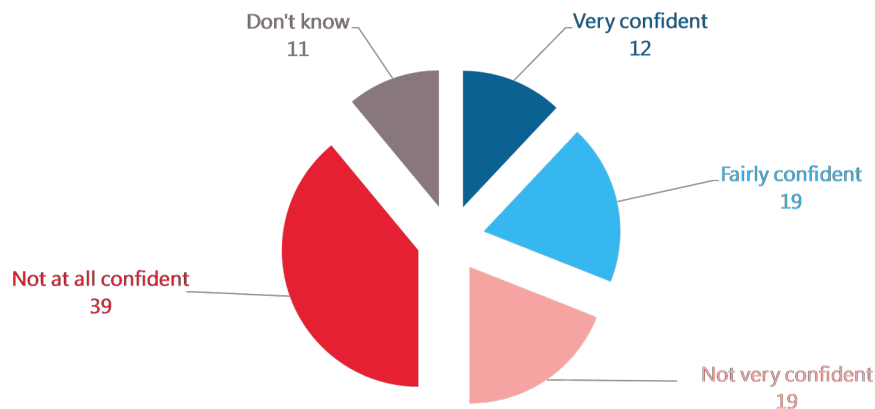
IV. BLACK MARKET CIGARETTES VS LEGAL CIGARETTES: ABILITY TO DISTINGUISH THE PACKETS

All respondents were asked how confident they would be in being able to distinguish a packet of black market cigarettes from a legal packet¹⁵.

Most Europeans are not confident that they could distinguish a packet of black market cigarettes from a legal packet

Just under a third of European (31%) say that they would be confident in being able to distinguish a packet of black market cigarettes from a legal packet, and this includes 12% who say they would be very confident. However, the majority (58%) say they would not be confident, including 39% who would not be at all confident.

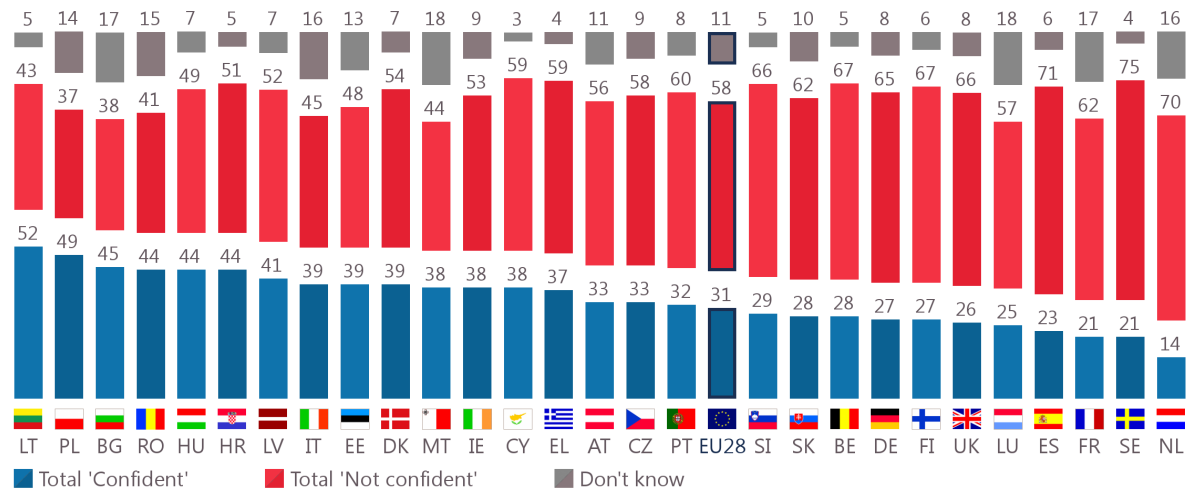
QB6 How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet.
(% - EU)



¹⁵ QB6: How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet. Very confident; Fairly confident; Not very confident; Not at all confident; Don't know.

Lithuania is the only country where a majority of respondents (52%) say that they would be confident in being able to distinguish a packet of black market cigarettes from a legal packet. The proportion is also high in Poland (49%), Bulgaria (45%), and Romania, Croatia and Hungary (all 44%). Less than a quarter of respondents say they would be confident in the Netherlands (14%), Sweden and France (both 21%) and Spain (23%).

QB6 How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet. (%)







The **socio-demographic** analysis shows the following:

- Men are more likely than women to say they would be confident in being able to distinguish a packet of black market cigarettes from a legal packet (38% vs. 24%).
- Older respondents (aged 55 or over) are less confident than younger respondents (24% vs. 32%-38%).
- Unemployed respondents (45%), manual workers (39%) and self-employed workers (37%) are more likely to say they would be confident, particularly when compared with house persons and retired people (both 23%).
- Respondents who have difficulties in paying bills most of the time (38%) or from time to time (40%) are more likely than those who never or almost never have these difficulties (27%) to say they would be able to distinguish a packet of black market cigarettes.
- Current smokers are much more likely to say they would be confident (58%), compared with former smokers (35%) and in particular non-smokers (16%). Confidence is also higher among those who have ever been offered black market cigarettes (58% vs. 26% of those who have never been offered them).

QB6 How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet.

(% - EU)

	Total 'Confident'	Total 'Not confident'	Don't know
EU28	31	58	11
 Gender			
Man	38	52	10
Woman	24	64	12
 Age			
15-24	32	58	10
25-39	38	53	9
40-54	35	56	9
55 +	24	63	13
 Socio-professional category			
Self-employed	37	53	10
Managers	30	61	9
Other white collars	35	56	9
Manual workers	39	52	9
House persons	23	64	13
Unemployed	45	45	10
Retired	23	63	14
Students	27	63	10
 Difficulties paying bills			
Most of the time	38	52	10
From time to time	40	51	9
Almost never/ Never	27	62	11
Smoker / Non-smoker			
Smoker	58	37	5
Past smoker	35	57	8
Non-smoker	16	69	15

V. REASONS FOR SMOKING BLACK MARKET CIGARETTES

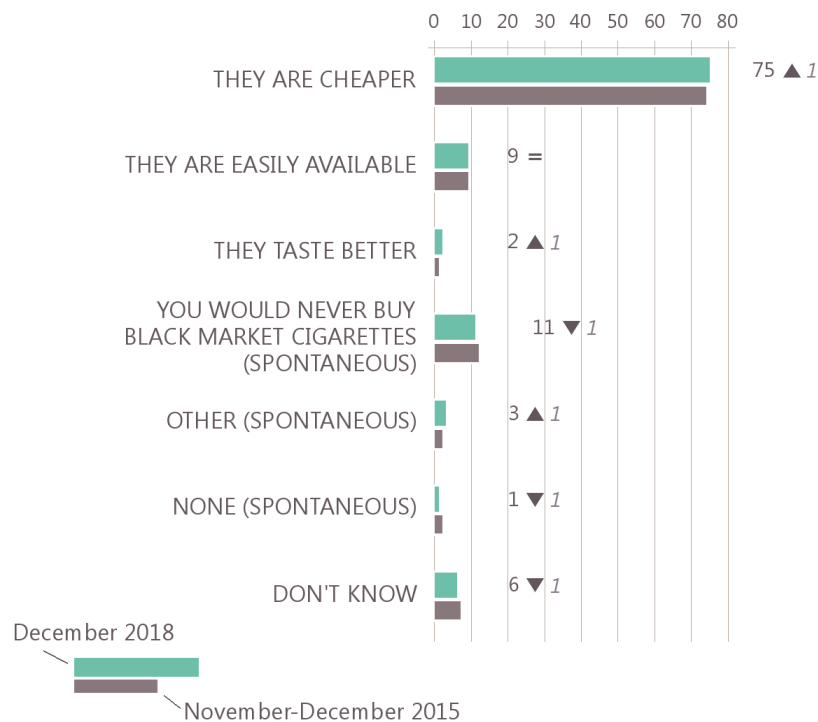
All respondents were then asked what they thought were the main reasons for smoking black market cigarettes¹⁶.

Three in four respondents think that one of the main reasons for smoking black market cigarettes is that they are cheaper

Three quarters of respondents say that one of the main reasons for smoking black market cigarettes is that they are cheaper (75%). The second most common reason is that they are easily available, although only 9% of respondents say this. Just 2% of respondents hold the view that they taste better. It is worth noting that around one in ten respondents spontaneously say that they would never buy black market cigarettes (11%) and a further 6% are unable to give a reason.

The findings are very similar to those observed in the 2015 survey, with no changes of more than one percentage point.

QB7 From your point of view, what are the main reasons for smoking black market cigarettes? (MAX. 2 ANSWERS)
(% - EU)

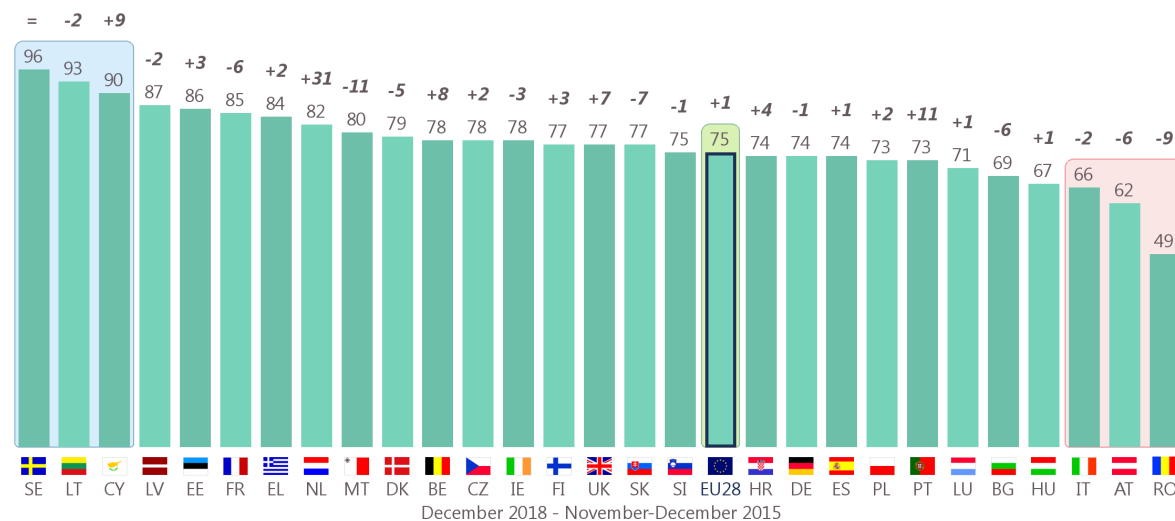


¹⁶ QB7: From your point of view, what are the main reasons for smoking black market cigarettes? They are cheaper; They taste better; They are easily available; You would never buy black market cigarettes (SPONTANEOUS); Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

In all except one Member State, a majority of respondents say that one of the main reasons for smoking black market cigarettes is because **they are cheaper**. The highest proportions are observed in Sweden (96%), Lithuania (93%) and Cyprus (90%). Romania is the one country where less than half of respondents mention this reason (49%), and less than seven in ten do so also in Austria (62%), Italy (66%), Hungary (67%) and Bulgaria (69%).

Compared with the 2015 survey, respondents in the Netherlands are now much more likely to say that one of the main reasons for smoking black market cigarettes is because they are cheaper (82%, +31 pp), with large increases also seen in Portugal (73%, +11 pp) and Cyprus (90%, +9 pp). The largest decreases can be seen in Malta (80%, -11 pp) and Romania (49%, -9 pp).

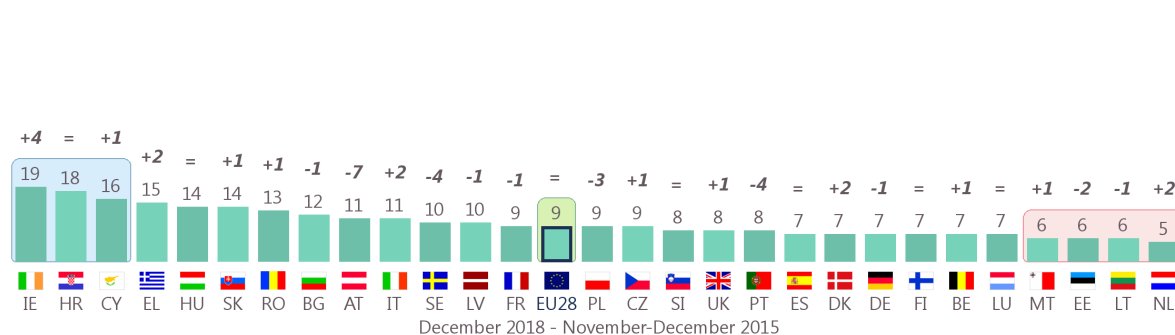
QB7 From your point of view, what are the main reasons for smoking black market cigarettes? (MAX. 2 ANSWERS)
(% - THEY ARE CHEAPER)



The proportion of respondents who think one of the main reasons for smoking black market cigarettes is that **they are easily available** ranges from 5% to 19%. Respondents in Ireland (19%), Croatia (18%) and Cyprus (16%) are most likely to say this, with the lowest proportions found in the Netherlands (5%) and Malta, Estonia and Lithuania (all 6%).

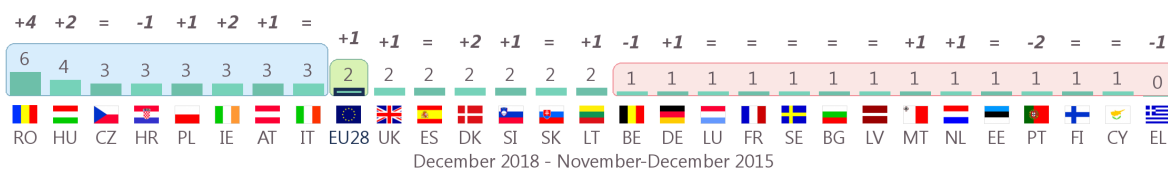
There are 12 countries where the proportion of respondents giving this answer has increased since 2015, the largest being in Ireland (19%, +4 pp). The proportion has stayed the same in six countries and decreased in ten, most notably Austria (11%, -7 pp).

QB7 From your point of view, what are the main reasons for smoking black market cigarettes? (MAX. 2 ANSWERS)
(% - THEY ARE EASILY AVAILABLE)



In every country, just a small minority of respondents say that one of the main reasons for smoking black market cigarettes is that **they taste better**. The proportion is highest in Romania, and this is also the only country showing a change of any substance since 2015 (6%, +4 pp).




QB7 From your point of view, what are the main reasons for smoking black market cigarettes? (MAX. 2 ANSWERS)
(% - **THEY TASTE BETTER**)



The **socio-demographic** analysis shows only minor differences by gender, with men slightly more likely than women to say that one of the main reasons for smoking black market cigarettes is that they are cheaper (77% vs. 72%). Other differences can also be observed by analysing the other categories:

- Respondents aged 25-54 are most likely to mention the fact that black market cigarettes are **cheaper** as one of the main reasons for smoking them (78% compared with 72% of 15-24 year-olds and 71% of those aged 55 or over). Younger respondents (aged 15-24) are slightly more likely than those in other age groups to mention **easy availability** as a reason (12% vs. 8%-9%).
- Respondents who stayed longer in education are more likely to mention the **cheap price** as one of the main reasons for smoking black market cigarettes (79% of those who finished education at the age of 20 or above, vs. 68% of those who left education at the age of 15 or below).
- People who smoke are more likely to say that one of the main reasons for smoking black market cigarettes is that **they are cheaper** (83% of current smokers and 81% of former smokers vs. 68% of non-smokers), although this difference partly reflects the differing proportions who either say they would never buy black market cigarettes or who do not know.
- Similarly, people who have been offered black market cigarettes (87%) are more likely than those who have not (72%) to say that one of the main reasons for smoking black market cigarettes is that **they are cheaper**, again partly reflecting the proportions saying they would never buy black market cigarettes or who do not know.

QB7 From your point of view, what are the main reasons for smoking black market cigarettes?
(MAX. 2 ANSWERS)
(% - EU)

	They are cheaper	They are easily available	They taste better	You would never buy black market cigarettes (SPONTANEOUS)	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28	75	9	2	11	3	1	6
 Gender							
Man	77	9	2	10	3	1	4
Woman	72	9	1	12	3	1	7
 Age							
15-24	72	12	3	10	5	1	7
25-39	78	9	2	9	3	2	4
40-54	78	9	2	10	3	1	4
55 +	71	8	1	13	3	2	8
 Education (End of)							
15-	68	7	2	14	4	2	8
16-19	75	10	2	12	3	1	5
20+	79	8	1	9	3	1	5
Still studying	71	11	4	11	4	1	7
Smoker / Non-smoker							
Smoker	83	11	2	7	2	1	2
Past smoker	81	8	2	8	2	1	4
Non-smoker	68	8	2	14	5	2	9
Have been offered black market cigarettes							
Yes	87	14	3	4	2	1	1
No	72	8	2	12	4	1	7

VI. MAIN SOURCES OF REVENUE FOR ORGANISED CRIME

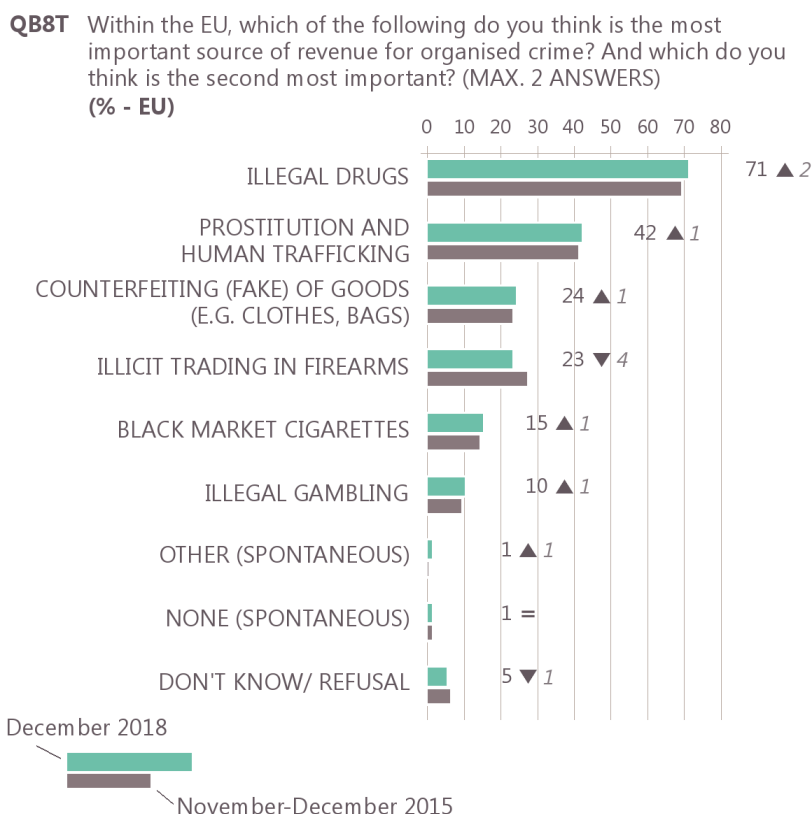
Broadening the scope of the survey, respondents were then asked what they thought are the most important sources of revenue for organised crime¹⁷.

Respondents say that the most important source of revenue for organised crime is illegal drugs

Respondents were asked what they thought are the two most important sources of revenue of organised crime.

Around seven in ten respondents (71%) identify illegal drugs as one of the two most important sources of income for organised crime. This is followed by prostitution and human trafficking (42%), counterfeiting of goods (24%) and illicit trading in firearms (23%). Black market cigarettes are mentioned by 15% as one of the two most important sources of revenue, and illegal gambling by 10%.

Responses have remained very similar to those observed in the 2015 survey. The largest change is a decrease in the proportion mentioning illicit trading in firearms as one of the two most important sources of revenue (-4 pp). The proportion mentioning black market cigarettes has increased marginally (+1 pp).



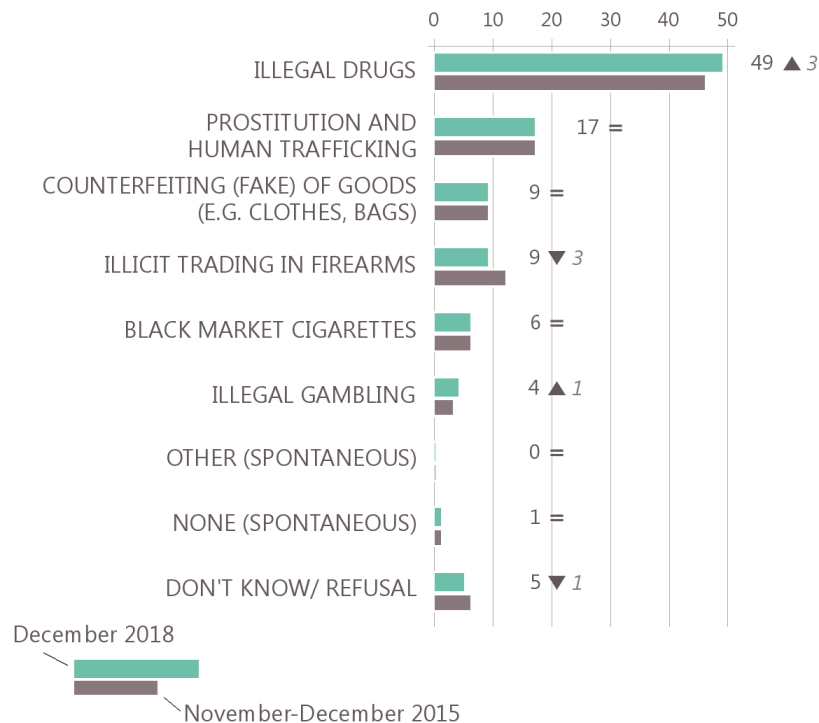
¹⁷ QB8: Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? Black market cigarettes; Counterfeiting (fake) of goods (e.g. clothes, bags); Illegal gambling; Prostitution and human trafficking; Illegal drugs; Illicit trading in firearms; Other (SPONTANEOUS); None (SPONTANEOUS); Refusal (SPONTANEOUS) Don't know.

When focusing on what the respondents think is the *single* most important source of revenue for organised crime, the same ranking of answers still applies.

Illegal drugs stands out as the highest answer, mentioned by almost half (49%) of respondents. Less than two in ten respondents say that prostitution and human trafficking is the most important source of revenue (17%), followed by the counterfeiting of goods and the illicit trading in firearms (both 9%). Just 6% mention black market cigarettes, while 4% mention illegal gambling.

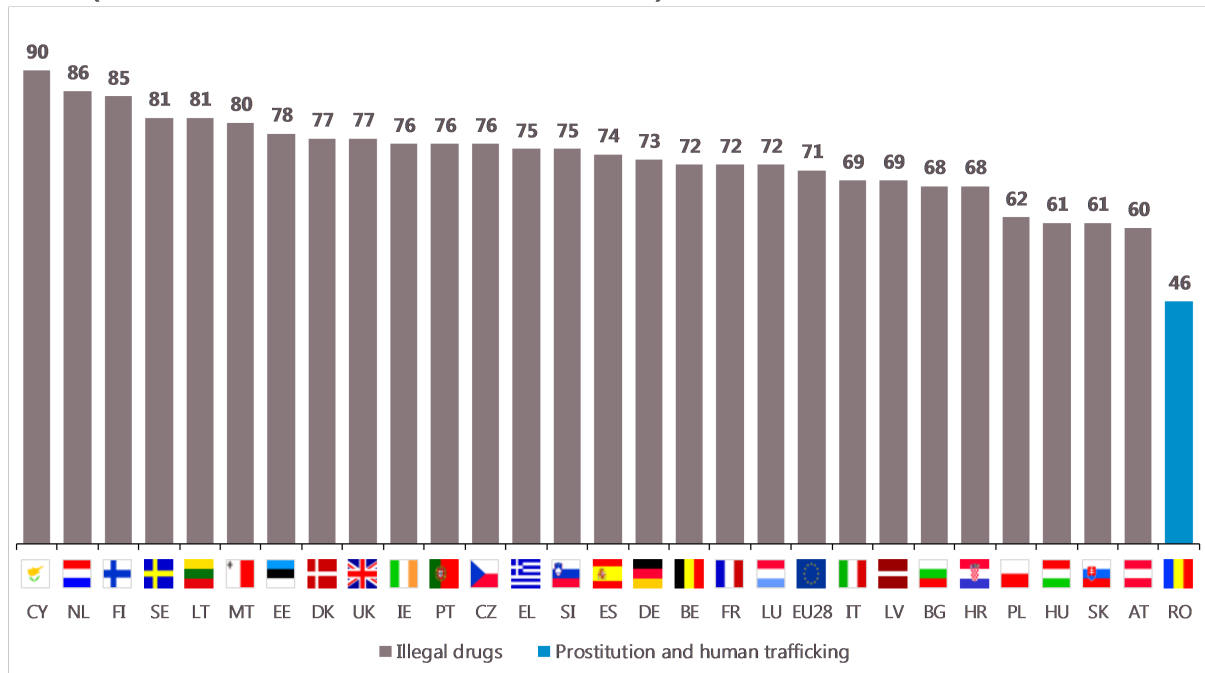
There has been little change in the responses since the 2015 survey. The proportion saying that the single most important source of revenue for organised crime is illegal drugs has increased (+3 pp), while the proportion mentioning illicit trading in firearms has decreased (-3 pp). There has been no change in the proportion saying black market cigarettes is the most important source of revenue.

QB8a Within the EU, which of the following do you think is the most important source of revenue for organised crime?
(% - EU)



In all countries except Romania, illegal drugs is mentioned most frequently as one of the two most important sources of income for organised crime. The most frequent response in Romania is prostitution and human trafficking.

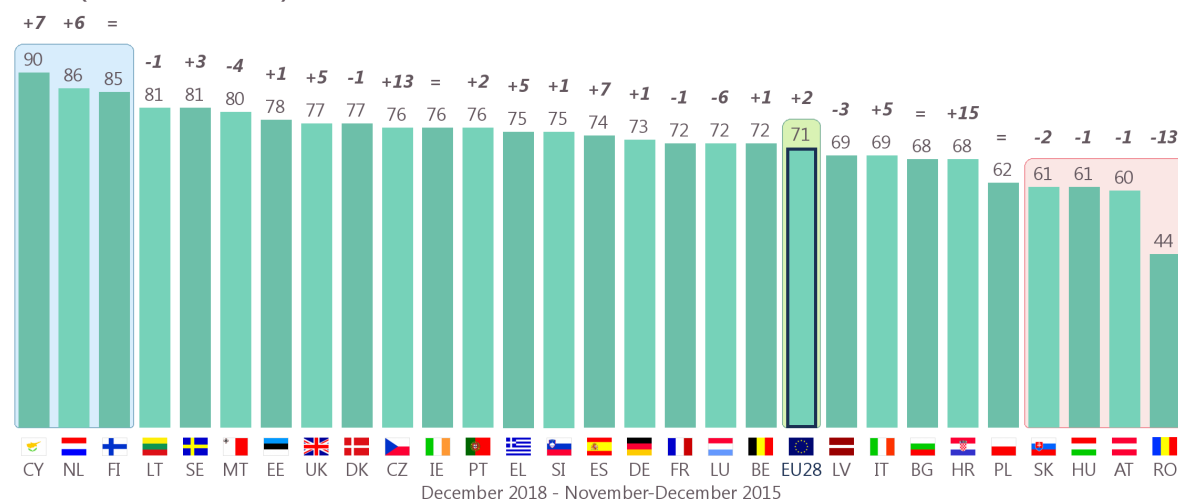
QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
 (% - THE MOST MENTIONED ANSWER BY COUNTRY)



Respondents in Cyprus (90%), the Netherlands (86%) and Finland (85%) are the most likely to identify **illegal drugs** as one of the most important sources of income for organised crime. At the other end of the scale, respondents in Romania are by far the least likely to say this (44%), with relatively low proportions also seen in Austria (60%), Slovakia and Hungary (both 61%) and Poland (62%).

The proportion mentioning illegal drugs has increased in 15 countries, with large increases in Croatia (68%, +15 pp) and Czechia (76%, +13 pp). Among the nine countries showing a decrease, by far the largest is in Romania (44%, -13 pp).

QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
 (% - ILLEGAL DRUGS)

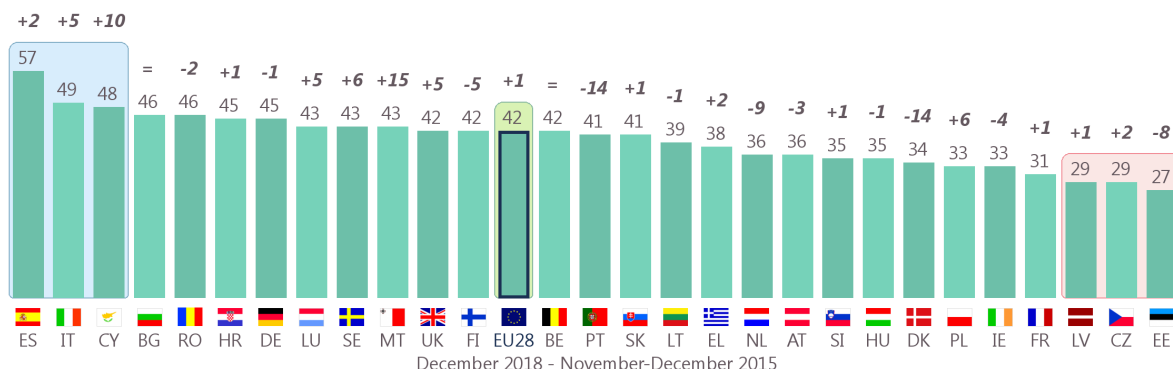


December 2018 - November-December 2015

Over half of respondents in Spain (57%), and nearly half in Italy (49%) and Cyprus (48%) mention **prostitution and human trafficking** as important sources of revenue for organised crime. By contrast, less than a third of respondents give this answer in Estonia (27%), Czechia and Latvia (both 29%) and France (31%).

The proportions giving this answer have increased substantially in Malta (43%, +15 pp) and Cyprus (48%, +10 pp), while large decreases are seen in Portugal (41%, -14 pp) and Denmark (34%, -14 pp).

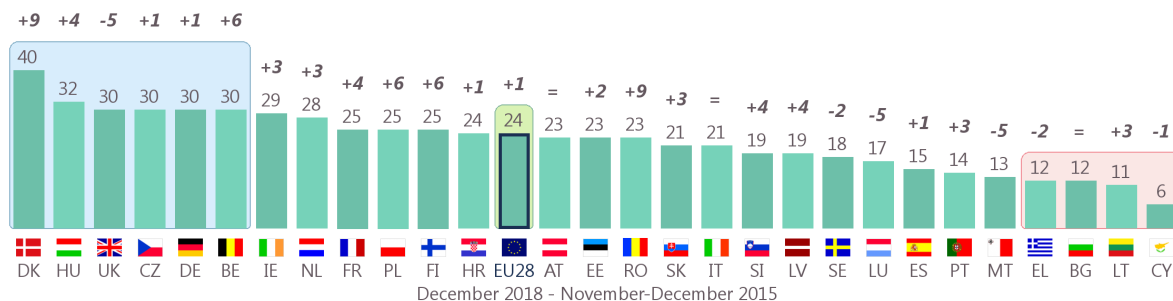
QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
 (% - PROSTITUTION AND HUMAN TRAFFICKING)



Respondents in Denmark (40%) are the most likely to say that **counterfeiting of goods (such as clothes or bags)** is one of the most important sources of income for organised crime. The proportions are also fairly high in Hungary (32%) and the United Kingdom, Czechia, Germany and Belgium (all 30%). At the other extreme, this answer is mentioned the least in Cyprus (6%), Lithuania (11%) and Bulgaria and Greece (both 12%).

The largest increases since 2015 are seen in Denmark (40%, +9 pp) and Romania (23%, +9 pp), while the largest decreases can be found in the United Kingdom (30%, -5 pp), Luxembourg (17%, -5 pp) and Malta (13%, -5 pp).

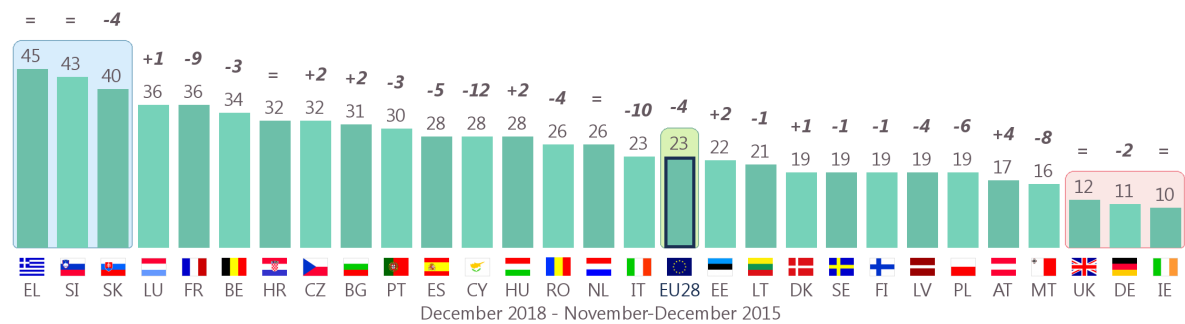
QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
 (% - COUNTERFEITING (FAKE) OF GOODS (E.G. CLOTHES, BAGS))



Respondents in Greece (45%), Slovenia (43%) and Slovakia (40%) are the most likely to think that the **illicit trading in firearms** is one of the most important sources of revenue for organised crime, while this is mentioned least frequently in Ireland (10%), Germany (11%) and the United Kingdom (12%).

Seven countries show an increase since 2015, the highest being in Austria (17%, +4 pp), while there are 15 countries where there has been a decrease, notably Cyprus (28%, -12 pp) and Italy (23%, -10 pp).

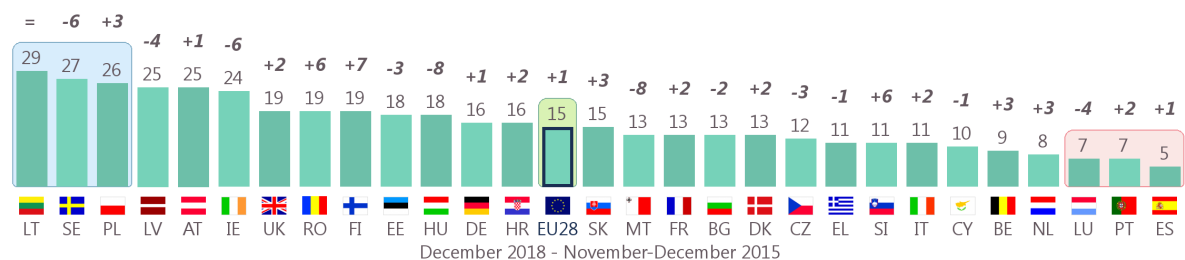
QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
(% - **ILLICIT TRADING IN FIREARMS**)



In three countries, more than a quarter of respondents think that **black market cigarettes** provide one of the most important sources of revenue for organised crime: Lithuania (29%), Sweden (27%) and Poland (26%). By contrast, less than one in ten respondents say this in Spain (5%), Portugal and Luxembourg (both 7%), the Netherlands (8%) and Belgium (9%).

There are 16 countries showing an increase since 2015, with the largest rises seen in Finland (19%, +7 pp), Romania (19%, +6 pp) and Slovenia (11%, +6 pp). Of the 11 countries where there has been a decrease, the largest are in Hungary (18%, -8 pp) and Malta (13%, -8 pp).

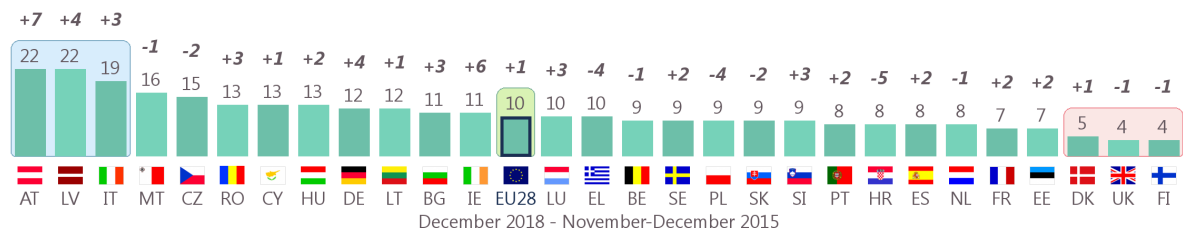
QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
(% - **BLACK MARKET CIGARETTES**)



Respondents are the most likely to identify **illegal gambling** as one of the most important sources of revenue for organised crime in Austria and Latvia (both 22%) and Italy (19%), while the lowest proportions are seen in Finland and the United Kingdom (both 4%) and Denmark (5%).

The largest increases since 2015 are seen in Austria (22%, +7 pp) and Ireland (11%, +6 pp), with the largest decrease in Croatia (8%, -5 pp).


QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
(% - **ILLEGAL GAMBLING**)



The **socio-demographic** analysis shows the following differences:

- Men are slightly more likely than women to say that **illegal drugs** provide one of the most important sources of revenue for organised crime (73% vs. 70%) and are also slightly more likely to mention **illegal gambling** (12% vs. 9%). However, women are slightly more likely than men to identify **illicit trading in firearms** as an important source of revenue (25% vs. 21%).
- The youngest respondents (aged 15-24) are less likely than older respondents to mention **prostitution and human trafficking** as an important source of revenue for organised crime (36% vs. 41%-43%), whereas older respondents (aged 55 or over) are least likely to mention **counterfeiting of goods** (21% vs. 26%-29%) and **black market cigarettes** (13% vs. 15%-18%).
- Respondents who have been offered **black market cigarettes** are more likely to mention this as an important source of revenue for organised crime (19% compared with 14% of those who have not been offered them), but other responses are similar between these two groups.

QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
(% - EU)

	Illegal drugs	Prostitution and human trafficking	Counterfeiting (fake) of goods (e.g. clothes, bags)	Illicit trading in firearms	Black market cigarettes	Illegal gambling
EU28	71	42	24	23	15	10
 Gender						
Man	73	41	25	21	16	12
Woman	70	42	23	25	14	9
 Age						
15-24	73	36	29	22	17	12
25-39	71	41	27	20	18	10
40-54	71	43	26	23	15	11
55 +	71	43	21	25	13	10
Have been offered black market cigarettes						
Yes	73	41	24	23	19	12
No	71	42	25	23	14	10

VII. MAIN PROBLEMS OF THE BLACK MARKET IN CIGARETTES

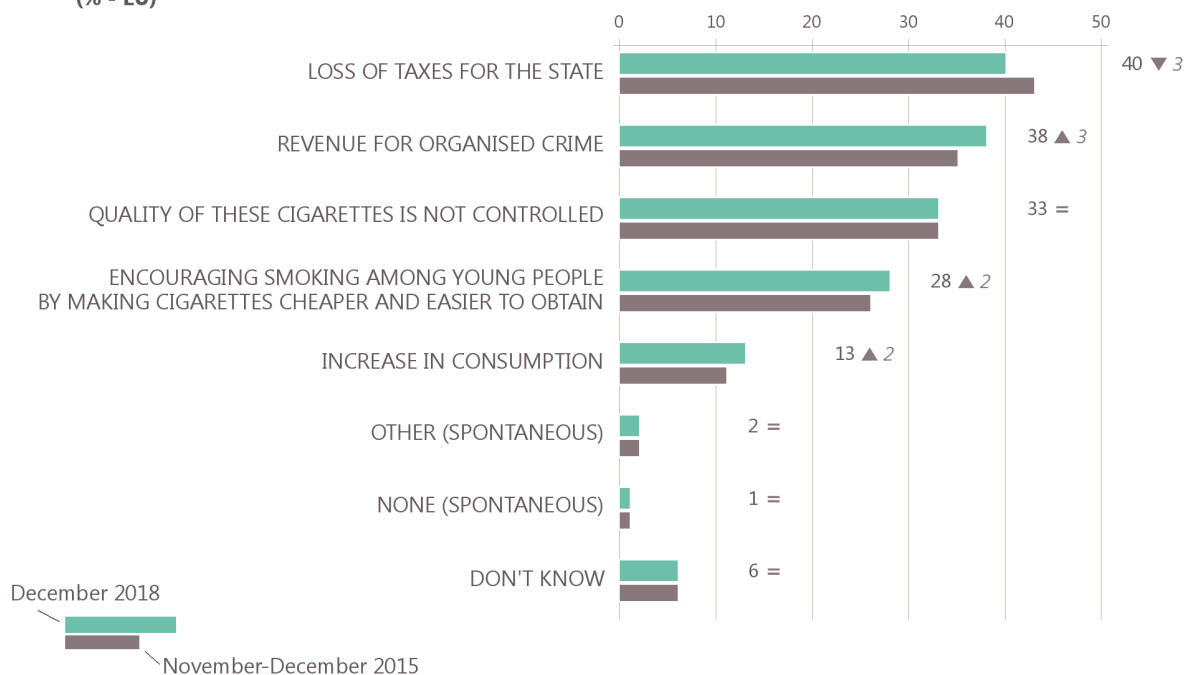
In this last section, the report discusses what respondents think are the main problems of the black market in cigarettes¹⁸.

The loss of taxes for the state as well as revenue for organised crime are seen as the main problems of the black market in cigarettes

The loss of taxes for the state is seen as one of the main problems of the black market in cigarettes (mentioned by 40%), while a slightly smaller proportion mention revenue for organised crime (38%). One in three (33%) mention the lack of quality control of these cigarettes, while just over a quarter of respondents mention encouraging smoking among young people by making cigarettes cheaper and easier to obtain (28%). One in eight respondents (13%) consider the increase in consumption as one of the main problems of the black market in cigarettes.

Results have remained broadly consistent with those seen in the 2015 survey. There has been an increase in the proportion saying that revenue for organised crime is one of the main problems of the black market in cigarettes (+3 percentage points) and a decrease in the proportion mentioning loss of taxes for the state (-3 pp).

QB9 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)
(% - EU)

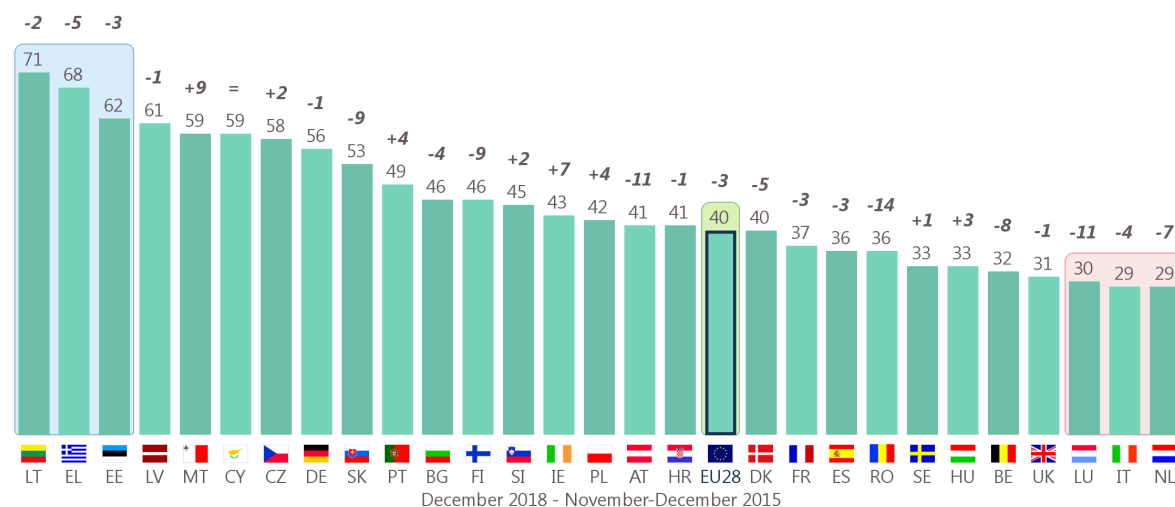


¹⁸ QB9: From your point of view, what are the main problems of the black market in cigarettes? Encouraging smoking among young people by making cigarettes cheaper and easier to obtain; Loss of taxes for the state; Revenue for organised crime; Increase in consumption; Quality of these cigarettes is not controlled; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

In nine Member States, a majority of respondents say that the **loss of taxes for the state** is one of the main problems of the black market in cigarettes. The highest proportions are seen in Lithuania (71%), Greece (68%), Estonia (62%) and Latvia (61%), while less than a third of respondents mention this in the Netherlands and Italy (both 29%), Luxembourg (30%), the United Kingdom (31%) and Belgium (32%).

Across the EU as a whole, this answer is less likely to be given than in 2015, and there have been large decreases in Romania (36%, -14 pp), Austria (41%, -11 pp) and Luxembourg (30%, -11 pp). The largest increases are seen in Malta (59%, +9 pp) and Ireland (43%, +7 pp).

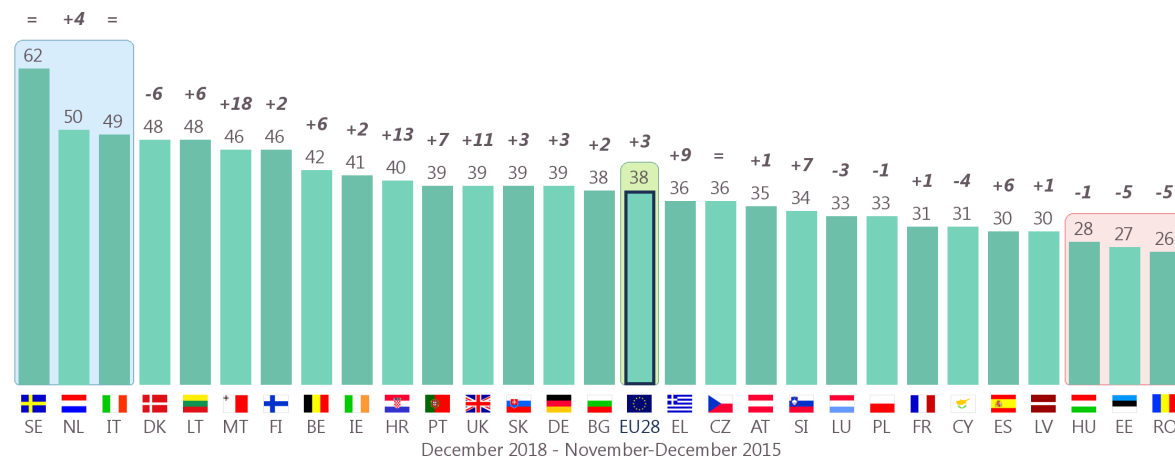
QB9 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)
(% - LOSS OF TAXES FOR THE STATE)



Respondents in Sweden (62%) are the most likely to mention **revenue for organised crime** as one of the main problems of the black market in cigarettes, followed by those in the Netherlands (50%), Italy (49%) and Denmark and Lithuania (both 48%). Respondents in Romania (26%), Estonia (27%) and Hungary (28%) are least likely to do so.

There have been some large increases since 2015 in the proportion giving this answer, most notably in Malta (46%, +18 pp), Croatia (40%, +13 pp) and the United Kingdom (39%, +11 pp). The largest decreases are seen in Denmark (48%, -6 pp), Estonia (27%, -5 pp) and Romania (26%, -5 pp).

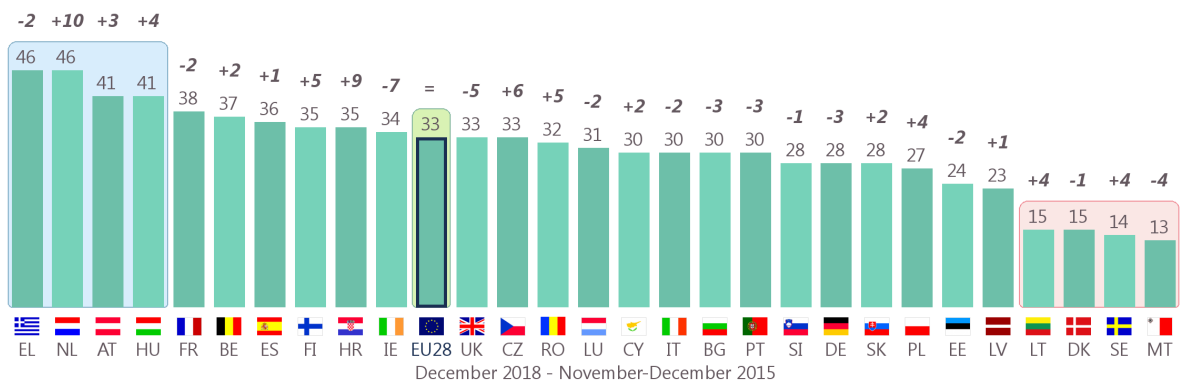
QB9 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)
(% - REVENUE FOR ORGANISED CRIME)



The fact that the **quality of these cigarettes is not controlled** is mentioned most by respondents in Greece and the Netherlands (both 46%) and Austria and Hungary (both 41%). The lowest proportions are seen in Malta (13%), Sweden (14%) and Lithuania and Denmark (both 15%).

The largest increases since 2015 are seen in the Netherlands (46%, +10 pp) and Croatia (35%, +9 pp), while the largest decreases can be found in Ireland (34%, -7 pp) and the United Kingdom (33%, -5 pp).

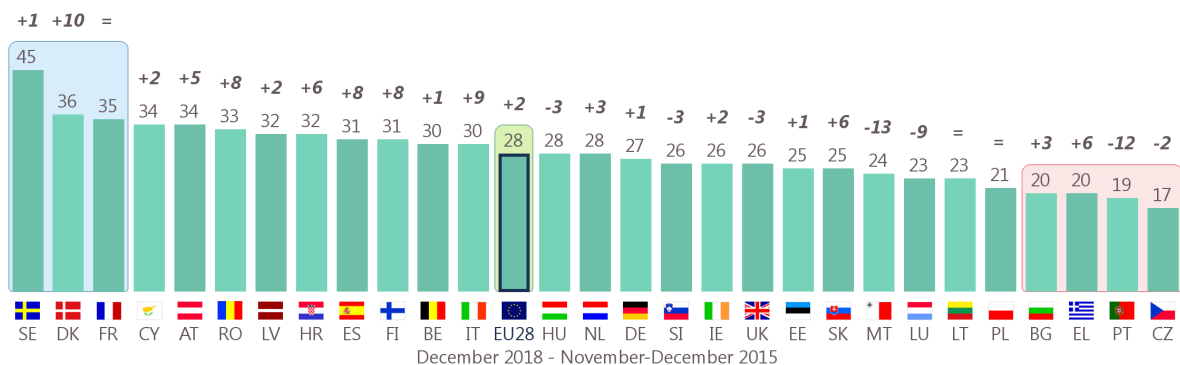
QB9 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)
(% - **QUALITY OF THESE CIGARETTES IS NOT CONTROLLED**)



Encouraging smoking among young people by making cigarettes cheaper and easier to obtain is mentioned most frequently by respondents in Sweden (45%), followed by those in Denmark (36%), France (35%) and Cyprus and Austria (both 34%). The lowest proportions are seen in Czechia (17%), Portugal (19%) and Bulgaria and Greece (both 20%).

The largest increases since 2015 are seen in Denmark (36%, +10 pp), Italy (30%, +9 pp), Romania (33%, +8 pp) and Spain and Finland (both 31%, +8 pp). Large decreases can be seen in Malta (24%, -13 pp) and Portugal (19%, -12 pp).

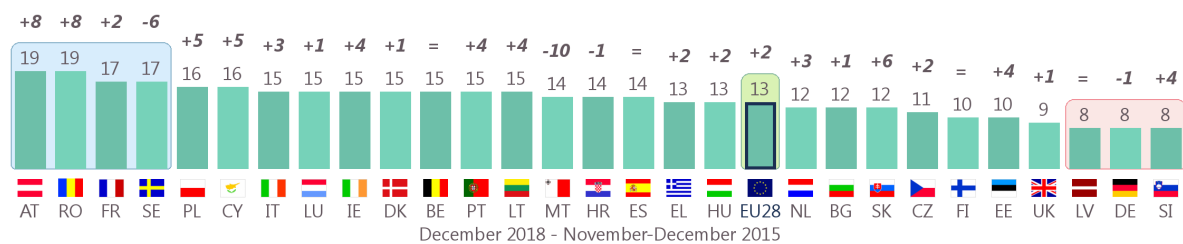
QB9 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)
(% - **ENCOURAGING SMOKING AMONG YOUNG PEOPLE BY MAKING CIGARETTES CHEAPER AND EASIER TO OBTAIN**)



The view that one of the main problems of the black market in cigarettes is the fact that it leads to an **increase in consumption** of cigarettes is held most widely by respondents in Austria and Romania (both 19%) and in France and Sweden (both 17%). It is least likely to be mentioned by respondents in Slovenia, Germany and Latvia (all 8%).

The largest increases since 2015 can be seen in Austria and Romania (both 19%, +8 pp), while the largest decrease is in Malta (14%, -10 pp).

QB9 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)
(% - INCREASE IN CONSUMPTION)






The **socio-demographic** analysis highlights the following

- The main difference by gender is that men are more likely than women to say that the **loss of taxes for the state** is one of the main problems of the black market in cigarettes (44% vs. 37%).
- The youngest respondents (aged 15-24) are more likely than older people to mention that it **encourages smoking among young people** (34% vs. 27%-28%) and that it causes an **increase in consumption** (18% vs. 11%-14%). However, they are less likely to mention the **loss of taxes for the state** (29% vs. 41%-43%) and the **revenue for organised crime** (31% vs. 36%-43%) as main problems of the black market in cigarettes. Older respondents (aged 55 or over) are less likely than younger respondents to mention the fact that the **quality of these cigarettes is not controlled** (27% vs. 34%-37%).
- Respondents who spent longer in education are the most likely to mention the **revenue for organised crime** as one of the main problems of the black market in cigarettes (43% of those who ended education at the age of 20 or above, compared with 34% of those who left by the age of 15).
- The one difference by smoking behaviour is that current and former smokers are more likely than non-smokers to mention the **lack of quality control** as one of the main problems (37%, 35% and 29% respectively).

QB9 From your point of view, what are the main problems of the black market in cigarettes?

(MAX. 2 ANSWERS)

(% - EU)

	Loss of taxes for the state	Revenue for organised crime	Quality of these cigarettes is not controlled	Encouraging smoking among young people by making cigarettes cheaper and easier to obtain	Increase in consumption
EU28	40	38	33	28	13
 Gender					
Man	44	40	31	27	12
Woman	37	36	33	30	14
 Age					
15-24	29	31	37	34	18
25-39	41	36	37	27	14
40-54	43	43	34	27	13
55 +	42	38	27	28	11
 Education (End of)					
15-	41	34	29	29	12
16-19	42	37	32	27	13
20+	42	43	33	28	13
Still studying	28	34	39	35	18
Smoker / Non-smoker					
Smoker	44	37	37	27	13
Past smoker	40	42	35	30	12
Non-smoker	39	37	29	29	14

CONCLUSION

This survey follows a Special Eurobarometer survey conducted in 2015 (EBS 443), and therefore provides an updated assessment of public experience and perceptions of the black market in cigarettes.

One in six Europeans say they have been offered black market cigarettes, although this rises to one in three among those who currently smoke. Geographically, black market cigarettes have the highest penetration in Latvia, Croatia, Greece, Lithuania and Bulgaria. Since 2015, there has been a slight fall in the overall proportion who have been offered black market cigarettes (-2 percentage points), and the proportion has decreased substantially in several countries, including those with high levels of penetration (such as Latvia, Bulgaria and Lithuania).

The low price is by far considered as the main reason for smoking black market cigarettes, and most of those who have been offered black market cigarettes say that they were at least 30% cheaper than legal cigarettes, with more than a third saying they were at least 50% cheaper. This is related to the analysis of the profile of people who are offered black market cigarettes, who tend to be unemployed and experience financial difficulties. This suggests that the lower price is a key factor for some people who are buying black market cigarettes.

As in 2015, the loss of taxes for the state and revenue for organised crime are seen as the main problems of the black market in cigarettes.

Only a small proportion of Europeans recognise that the black market for cigarettes is one of the key revenue sources for organised crime groups, again in line with the 2015 survey. The survey also found that the majority of respondents would not be confident in being able to distinguish a packet of black market cigarettes from a legal packet. This suggests that there is scope to increase public awareness, both of the importance of black market cigarettes to organised crime gangs, and of how these cigarettes can be identified. However, this needs to be combined with further efforts to discourage people from accepting the much lower prices that they are offered for black market cigarettes, which may be particularly attractive for people with low incomes.

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TECHNICAL SPECIFICATIONS

Between the 4th and 20th of December 2018, Kantar carried out the wave 90.4 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Media monitoring and Eurobarometer" Unit.

The wave 90.4 covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over.

	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+	PROPORTION EU28
BE	Belgium	Kantar Belgium (Kantar TNS)	1,079	04/12/2018	17/12/2018	9,693,779	2.25%
BG	Bulgaria	Kantar TNS BBSS	1,034	04/12/2018	16/12/2018	6,537,535	1.52%
CZ	Czechia	Kantar CZ	1,008	04/12/2018	17/12/2018	9,238,431	2.14%
DK	Denmark	Kantar Gallup	1,004	04/12/2018	19/12/2018	4,838,729	1.12%
DE	Germany	Kantar Deutschland	1,526	04/12/2018	19/12/2018	70,160,634	16.26%
EE	Estonia	Kantar Emor	1,004	04/12/2018	17/12/2018	1,160,064	0.27%
IE	Ireland	Behaviour & Attitudes	1,001	04/12/2018	20/12/2018	3,592,162	0.83%
EL	Greece	Taylor Nelson Sofres Market Research	1,016	05/12/2018	16/12/2018	9,937,810	2.30%
ES	Spain	TNS Investigación de Mercados y Opinión	1,007	05/12/2018	17/12/2018	39,445,245	9.14%
FR	France	Kantar Public France	1,014	04/12/2018	18/12/2018	54,097,255	12.54%
HR	Croatia	Hendal	1,010	05/12/2018	16/12/2018	3,796,476	0.88%
IT	Italy	Kantar Italia	1,008	04/12/2018	16/12/2018	52,334,536	12.13%
CY	Rep. Of Cyprus	CYMAR Market Research	499	04/12/2018	16/12/2018	741,308	0.17%
LV	Latvia	Kantar TNS Latvia	1,002	05/12/2018	18/12/2018	1,707,082	0.40%
LT	Lithuania	TNS LT	1,007	04/12/2018	17/12/2018	2,513,384	0.58%
LU	Luxembourg	ILReS	501	04/12/2018	15/12/2018	457,127	0.11%
HU	Hungary	Kantar Hoffmann	1,047	05/12/2018	17/12/2018	8,781,161	2.04%
MT	Malta	MISCO International	506	04/12/2018	19/12/2018	364,171	0.08%
NL	Netherlands	TNS NIPO	1,044	05/12/2018	17/12/2018	13,979,215	3.24%
AT	Austria	Das Österreichische Gallup Institut	1,033	04/12/2018	17/12/2018	7,554,711	1.75%
PL	Poland	Kantar Polska	1,011	05/12/2018	17/12/2018	33,444,171	7.75%
PT	Portugal	Marktest – Marketing, Organização e Formação	1,012	04/12/2018	16/12/2018	8,480,126	1.97%
RO	Romania	Centrul Pentru Studierea Opiniei si Pietei (CSOP)	1,063	06/12/2018	16/12/2018	16,852,701	3.91%
SI	Slovenia	Mediana DOO	1,026	04/12/2018	16/12/2018	1,760,032	0.41%
SK	Slovakia	Kantar Slovakia	1,013	05/12/2018	16/12/2018	4,586,024	1.06%
FI	Finland	Kantar TNS Oy	1,030	04/12/2018	18/12/2018	4,747,810	1.10%
SE	Sweden	Kantar Sifo	1,072	04/12/2018	17/12/2018	7,998,763	1.85%
UK	United Kingdom	Kantar UK Limited	1,066	05/12/2018	19/12/2018	52,651,777	12.20%
		TOTAL EU28	27,643	04/12/2018	20/12/2018	431,452,219	100%*

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding

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The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II¹ (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas.

In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), Kantar Public applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed here.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows

various observed results are in columns

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6.0	8.3	9.9	11.1	12.0	12.7	13.2	13.6	13.8	13.9	N=50
N=500	1.9	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4	N=500
N=1000	1.4	1.9	2.2	2.5	2.7	2.8	3.0	3.0	3.1	3.1	N=1000
N=1500	1.1	1.5	1.8	2.0	2.2	2.3	2.4	2.5	2.5	2.5	N=1500
N=2000	1.0	1.3	1.6	1.8	1.9	2.0	2.1	2.1	2.2	2.2	N=2000
N=3000	0.8	1.1	1.3	1.4	1.5	1.6	1.7	1.8	1.8	1.8	N=3000
N=4000	0.7	0.9	1.1	1.2	1.3	1.4	1.5	1.5	1.5	1.5	N=4000
N=5000	0.6	0.8	1.0	1.1	1.2	1.3	1.3	1.4	1.4	1.4	N=5000
N=6000	0.6	0.8	0.9	1.0	1.1	1.2	1.2	1.2	1.3	1.3	N=6000
N=7000	0.5	0.7	0.8	0.9	1.0	1.1	1.1	1.1	1.2	1.2	N=7000
N=7500	0.5	0.7	0.8	0.9	1.0	1.0	1.1	1.1	1.1	1.1	N=7500
N=8000	0.5	0.7	0.8	0.9	0.9	1.0	1.0	1.1	1.1	1.1	N=8000
N=9000	0.5	0.6	0.7	0.8	0.9	0.9	1.0	1.0	1.0	1.0	N=9000
N=10000	0.4	0.6	0.7	0.8	0.8	0.9	0.9	1.0	1.0	1.0	N=10000
N=11000	0.4	0.6	0.7	0.7	0.8	0.9	0.9	0.9	0.9	0.9	N=11000
N=12000	0.4	0.5	0.6	0.7	0.8	0.8	0.9	0.9	0.9	0.9	N=12000
N=13000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.9	0.9	N=13000
N=14000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.8	0.8	N=14000
N=15000	0.3	0.5	0.6	0.6	0.7	0.7	0.8	0.8	0.8	0.8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

¹ Figures updated in August 2015

QUESTIONNAIRE**ASK ALL**

QB1 Which of the following statements about smoking traditional or “roll your own” cigarettes applies to you? Please note in this survey smoking cigarettes does not include the use of electronic or heated cigarettes.

(M)*(READ OUT – ONE ANSWER ONLY)*

You currently smoke	1
You used to smoke but you have stopped	2
You have never smoked	3
DK	4

EB84.4 QC1

ASK QB2a IF “CURRENTLY SMOKE”, CODE 1 IN QB1

QB2a How often do you smoke traditional cigarettes?

(READ OUT - ONE ANSWER ONLY)

Every day	1
Every week	2
Every month	3
Less than monthly	4
You have tried only once or twice	5
Never	6
DK	7

NEW

ASK QB2b IF “USED TO SMOKE”, CODE 2 IN QB1

QB2b How often did you use to smoke traditional cigarettes?

(READ OUT - ONE ANSWER ONLY)

Every day	1
Every week	2
Every month	3
Less than monthly	4
You have tried only once or twice	5
Never	6
DK	7

NEW

ASK ALL**QB3 Have you ever been offered black market cigarettes to buy or smoke?***(READ OUT – ONE ANSWER ONLY)*

No, never	1
Yes, but rarely, that is to say less than once a month	2
Yes, occasionally, that is to say once to three times per month	3
Yes, regularly, that is to say once per week or more frequently	4
Refusal (SPONTANEOUS)	5
DK	6

EB84.4 QC2

**ASK QB4 AND QB5 IF "YES", CODE 2 TO 4 IN QB3 - OTHER GO TO QB6
QB4: CODES 6 TO 8 ARE EXCLUSIVE****QB4 Where were you offered this type of cigarettes?***(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

On the Internet	1,
In an ordinary shop selling this kind of cigarettes under the counter	2,
In the street	3,
In a restaurant or bar	4,
Other (SPONTANEOUS)	5,
You don't remember (SPONTANEOUS)	6,
Refusal (SPONTANEOUS)	7,
DK	8,

EB84.4 QC3

QB5 Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes?*(READ OUT - ONE ANSWER ONLY)*

At least 50% cheaper	1
At least 30% cheaper	2
At least 10% cheaper	3
Less than 10% cheaper	4
They were not any cheaper	5
DK	6

NEW

ASK ALL**QB6 How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet.***(READ OUT - ONE ANSWER ONLY)*

Very confident	1
Fairly confident	2
Not very confident	3
Not at all confident	4
DK	5

NEW

QB7: ROTATE ANSWERS 1 TO 3**QB7: CODES 4, 6 AND 7 ARE EXCLUSIVE****QB7 From your point of view, what are the main reasons for smoking black market cigarettes?***(READ OUT - MAX. 2 ANSWERS)*

They are cheaper	1,
They taste better	2,
They are easily available	3,
You would never buy black market cigarettes (SPONTANEOUS)	4,
Other (SPONTANEOUS)	5,
None (SPONTANEOUS)	6,
DK	7,

EB84.4 QC4

QB8a&b: ROTATE ANSWERS 1 TO 6**QB8b: DO NOT ASK QB8b IF CODE 8, 9 OR 10 IN QB8a****QB8b: CODE 9 CANNOT BE PROPOSED****QB8b: DO NOT PROPOSE CODE 1 TO 6 IN QB8b IF ALREADY MENTIONED IN QB8a****QB8a Within the EU, which of the following do you think is the most important source of revenue for organised crime?****QB8b And which do you think is the second most important?***(SHOW SCREEN – READ OUT – ONE ANSWER PER COLUMN)*





























	QB8a FIRST	QB8b SECOND
Black market cigarettes	1	1
Counterfeiting (fake) of goods (e.g. clothes, bags)	2	2
Illegal gambling	3	3
Prostitution and human trafficking	4	4
Illegal drugs	5	5
Illicit trading in firearms	6	6
Other (SPONTANEOUS)	7	7
None (SPONTANEOUS)	8	8
Refusal (SPONTANEOUS)	9	9
DK	10	10

*EB84.4 QC5a QC5b***QB9: ROTATE ANSWERS 1 TO 5****QB9: CODES 7 AND 8 ARE EXCLUSIVE****QB9 From your point of view, what are the main problems of the black market in cigarettes?***(SHOW SCREEN – READ OUT – MAX. 2 ANSWERS)*

Encouraging smoking among young people by making cigarettes cheaper and easier to obtain	1,
Loss of taxes for the state	2,
Revenue for organised crime	3,
Increase in consumption	4,
Quality of these cigarettes is not controlled	5,
Other (SPONTANEOUS)	6,
None (SPONTANEOUS)	7,
DK	8,






























EB84.4 QC6

QB1 Which of the following statements about smoking traditional or "roll your own" cigarettes applies to you? Please note in this survey smoking cigarettes does not include the use of electronic or heated cigarettes.
(%)

		You currently smoke		You used to smoke but you have stopped		You have never smoked		Don't know
		EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	
EU28		25	-3	23	0	52	3	0
BE		21	-2	22	1	57	1	0
BG		36	-2	15	-1	48	2	1
CZ		33	2	21	0	46	-2	0
DK		19	0	33	0	48	0	0
DE		23	-2	22	-3	54	5	1
EE		23	-3	25	1	52	2	0
IE		15	-7	21	-3	64	10	0
EL		35	-3	21	1	44	2	0
ES		25	-3	25	4	50	-1	0
FR		31	-1	25	-1	44	2	0
HR		32	-3	21	3	47	0	0
IT		26	-5	20	-2	54	7	0
CY		32	-1	17	-4	51	5	0
LV		30	-2	19	-3	51	5	0
LT		27	1	20	1	53	-2	0
LU		22	-3	24	2	54	1	0
HU		29	-3	19	0	52	3	0
MT		18	-6	24	4	58	2	0
NL		13	-11	35	1	52	10	0
AT		29	-10	23	1	48	9	0
PL		32	4	17	-6	51	4	0
PT		29	3	13	-2	58	-1	0
RO		27	-4	10	-5	63	9	0
SI		27	-1	20	-3	53	4	0
SK		27	-3	18	2	55	1	0
FI		15	-5	25	-3	60	8	0
SE		10	-1	35	-4	55	5	0
UK		18	-5	27	4	55	1	0

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QB2a How often do you smoke traditional cigarettes?
(%)
(IF 'CURRENTLY SMOKE', CODE 1 IN QB1)

		Every day	Every week	Every month	Less than monthly	You have tried only once or twice	Never	Don't know	At least 'Every week'
EU28		90	6	1	1	0	2	0	96
BE		89	4	1	1	0	5	0	93
BG		98	0	0	0	0	2	0	98
CZ		93	3	2	1	0	1	0	96
DK		84	10	0	1	0	5	0	94
DE		92	5	0	2	0	1	0	97
EE		91	5	1	0	0	3	0	96
IE		95	2	0	2	0	1	0	97
EL		97	2	1	0	0	0	0	99
ES		91	7	1	0	0	1	0	98
FR		84	11	2	1	0	2	0	95
HR		92	5	0	1	0	2	0	97
IT		95	3	1	0	0	1	0	98
CY		91	4	1	1	0	3	0	95
LV		89	7	3	0	1	0	0	96
LT		93	5	0	0	1	1	0	98
LU		91	4	0	0	0	4	1	95
HU		91	3	1	2	0	3	0	94
MT		94	1	4	0	0	0	1	95
NL		80	11	1	1	1	6	0	91
AT		92	6	0	1	0	1	0	98
PL		90	6	1	1	0	2	0	96
PT		97	1	0	0	0	2	0	98
RO		97	2	0	0	0	1	0	99
SI		92	4	1	1	0	2	0	96
SK		97	2	0	0	0	1	0	99
FI		87	7	3	2	0	1	0	94
SE		74	10	2	11	0	3	0	84
UK		83	10	1	3	0	3	0	93

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Tables






























QB2b How often did you use to smoke traditional cigarettes?
(%)
(IF 'USED TO SMOKE'; CODE 2 IN QB1)

		Every day	Every week	Every month	Less than monthly	You have tried only once or twice	Never	Don't know	At least 'Every week'
EU28		80	9	3	3	2	3	0	89
BE		84	7	1	3	1	4	0	91
BG		89	3	2	1	0	5	0	92
CZ		79	10	4	4	2	1	0	89
DK		81	11	2	4	0	2	0	92
DE		81	10	2	2	2	2	1	91
EE		69	12	6	2	4	7	0	81
IE		80	6	1	1	2	10	0	86
EL		93	5	1	1	0	0	0	98
ES		82	8	2	3	2	3	0	90
FR		81	7	2	3	2	5	0	88
HR		75	11	6	4	1	3	0	86
IT		82	10	4	1	0	2	1	92
CY		88	5	5	0	1	1	0	93
LV		64	10	4	8	3	10	1	74
LT		76	13	2	2	3	4	0	89
LU		71	9	4	2	4	7	3	80
HU		83	9	1	2	2	2	1	92
MT		80	4	2	11	2	1	0	84
NL		84	10	2	2	0	2	0	94
AT		68	19	5	4	1	2	1	87
PL		70	5	10	2	6	6	1	75
PT		85	2	1	1	2	9	0	87
RO		79	8	3	0	5	5	0	87
SI		79	11	3	3	4	0	0	90
SK		74	13	3	3	5	2	0	87
FI		73	13	6	3	2	3	0	86
SE		73	15	6	2	1	3	0	88
UK		77	10	2	3	4	4	0	87

QB2T How often do/did you smoke traditional cigarettes? (Past and present)

(%)






























(IF 'CURRENTLY SMOKE OR USED TO SMOKE', CODE 1 OR 2 IN QB1)

		Every day	Every week	Every month	Less than monthly	You have tried only once or twice	Never	Don't know	At least 'Every week'
EU28		85	7	2	2	1	2	0	93
BE		86	6	1	2	0	4	0	92
BG		95	1	0	1	0	3	0	96
CZ		87	6	2	2	1	1	0	93
DK		82	10	2	3	0	3	0	92
DE		87	7	1	2	1	2	0	94
EE		79	9	3	1	2	5	0	88
IE		86	4	1	2	1	6	0	90
EL		96	3	1	1	0	0	0	99
ES		87	7	1	2	1	2	0	94
FR		83	9	2	2	1	3	0	92
HR		85	7	2	3	1	2	0	92
IT		90	6	2	1	0	1	0	95
CY		90	4	3	1	0	2	0	94
LV		79	8	4	4	2	4	0	87
LT		86	9	1	1	1	2	0	94
LU		81	6	2	1	2	5	2	88
HU		88	6	1	2	1	2	0	93
MT		86	2	3	6	1	1	1	88
NL		83	11	2	1	0	3	0	94
AT		81	12	2	2	1	1	0	93
PL		83	6	4	1	2	3	1	89
PT		93	1	0	0	1	4	0	95
RO		92	4	1	0	1	2	0	96
SI		87	7	2	2	2	1	0	93
SK		87	7	1	1	2	1	0	94
FI		78	11	5	2	1	2	0	89
SE		73	14	5	4	1	3	0	87
UK		80	10	1	3	2	4	0	90

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Tables

QB3 Have you ever been offered black market cigarettes to buy or smoke?
(%)

		No, never		Yes, but rarely, that is to say less than once a month		Yes, occasionally, that is to say once to three times per month		Yes, regularly, that is to say once per week or more frequently		Refusal (SPONTANEOUS)		Don't know		Total 'Yes'	
		EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4
EU28		81	2	11	-2	4	0	2	0	1	0	1	17	-2	
BE		90	0	8	0	1	0	1	0	0	0	0	10	0	
BG		68	4	15	0	7	-3	3	-5	3	1	4	25	-8	
CZ		82	2	11	-2	3	0	1	-1	1	0	2	15	-3	
DK		77	-2	17	0	3	0	3	2	0	0	0	23	2	
DE		80	2	13	-2	3	0	1	0	1	-1	2	17	-2	
EE		77	1	15	-1	4	1	2	-1	1	1	1	21	-1	
IE		84	10	10	-5	3	-4	2	-1	0	0	1	15	-10	
EL		71	-1	20	2	7	1	2	-1	0	-1	0	29	2	
ES		78	0	12	-3	6	3	3	0	0	0	1	21	0	
FR		80	-2	14	0	4	1	2	1	0	0	0	20	2	
HR		67	2	20	1	9	-2	4	1	0	-2	0	33	0	
IT		86	-1	8	1	3	1	1	0	1	-1	1	12	2	
CY		88	1	8	2	2	-2	2	0	0	-1	0	12	0	
LV		56	13	27	-6	9	-4	7	-3	0	-1	1	43	-13	
LT		70	6	15	-4	6	-3	7	0	1	1	1	28	-7	
LU		90	-4	7	1	1	1	1	1	0	0	1	9	3	
HU		82	12	12	-7	3	-4	1	-1	1	0	1	16	-12	
MT		87	3	5	-6	5	1	1	0	0	0	2	11	-5	
NL		88	3	9	-2	1	-1	1	0	0	0	1	11	-3	
AT		78	6	13	-4	4	0	1	0	2	-1	2	18	-4	
PL		81	9	10	-3	3	-3	3	-1	2	0	1	16	-7	
PT		90	0	6	-2	1	0	1	0	0	0	2	8	-2	
RO		81	10	9	-4	5	-3	3	-3	1	0	1	17	-10	
SI		83	4	12	0	2	-2	2	0	1	0	0	16	-2	
SK		82	2	11	-3	3	0	1	0	1	0	2	15	-3	
FI		84	3	13	-3	1	-1	1	0	0	0	1	15	-4	
SE		84	1	13	-2	2	1	1	0	0	0	0	16	-1	
UK		82	3	9	-2	5	-1	3	-1	0	0	1	17	-4	

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Tables

QB4 Where were you offered this type of cigarettes? (MULTIPLE ANSWERS POSSIBLE)






























(%)

(IF 'YES', CODE 2 TO 4 IN QB3)

		On the Internet		In an ordinary shop selling this kind of cigarettes under the counter		In the street		In a restaurant or bar		Other (SPONTANEOUS)		You don't remember (SPONTANEOUS)		Refusal (SPONTANEOUS)		Don't know
		EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4
EU28		3	1	10	2	67	7	14	2	14	-12	3	1	1	0	1
BE		2	1	9	2	64	16	13	-15	18	-7	0	0	0	-1	4
BG		6	5	8	-3	78	2	13	8	8	-4	3	0	3	1	1
CZ		4	3	20	-1	39	4	31	11	15	-13	1	0	1	-3	1
DK		2	1	6	-1	37	6	20	9	43	-9	1	0	1	1	1
DE		2	1	8	6	77	4	5	-2	9	-10	10	6	0	-2	0
EE		2	-1	3	2	58	4	4	3	37	-10	3	2	1	1	0
IE		4	1	11	5	64	-3	15	4	13	-6	2	2	0	0	1
EL		0	-1	4	1	80	4	11	0	18	-11	1	0	1	0	0
ES		0	-1	9	-4	70	7	23	3	16	-5	1	0	1	-1	0
FR		3	3	3	0	78	7	7	0	16	-16	0	0	0	0	1
HR		4	3	5	-2	67	8	24	15	11	-17	4	2	5	2	1
IT		4	2	16	10	66	-3	19	7	2	-14	3	2	0	-1	0
CY		0	-1	13	-5	50	19	17	5	24	-9	2	-5	3	3	0
LV		1	1	2	-1	72	6	0	-1	32	-5	0	0	1	1	1
LT		3	2	5	3	64	4	2	-1	31	-9	1	-2	4	2	1
LU		0	-15	0	-6	79	0	22	9	12	12	0	0	0	0	0
HU		2	-1	14	7	76	6	8	1	8	-11	3	2	1	1	1
MT		9	9	28	-10	57	24	21	4	4	-16	1	1	0	0	3
NL		0	-3	6	2	38	9	24	3	42	-10	0	0	0	0	0
AT		14	14	30	8	40	-5	41	14	12	-12	4	-1	2	-1	0
PL		1	-1	8	1	64	11	3	-2	19	-14	2	1	3	1	4
PT		2	-1	13	-2	57	2	38	20	13	-9	0	-2	0	-2	2
RO		0	0	6	-3	85	2	1	-3	4	-5	3	2	2	1	0
SI		8	4	2	-3	59	0	28	12	21	-15	2	2	1	0	1
SK		2	0	4	0	64	2	35	18	13	-9	2	2	4	0	1
FI		3	1	0	0	53	10	19	2	32	-13	1	0	0	0	0
SE		2	1	29	5	32	0	15	6	31	-11	0	-2	0	0	0
UK		5	-2	19	6	48	15	24	-1	13	-17	0	-1	2	2	3

QB5 Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes? (%)






























(IF 'YES', CODE 2 TO 4 IN QB3)

		At least 50% cheaper	At least 30% cheaper	At least 10% cheaper	Less than 10% cheaper	They were not any cheaper	Don't know
EU28		37	37	9	1	1	15
BE		33	44	5	5	3	10
BG		22	59	6	2	1	10
CZ		27	40	23	1	3	6
DK		47	27	4	0	5	17
DE		40	38	4	0	1	17
EE		40	35	6	1	3	15
IE		56	26	4	3	2	9
EL		69	21	2	0	0	8
ES		31	32	11	2	4	20
FR		39	41	3	0	1	16
HR		20	49	15	9	4	3
IT		22	46	25	4	0	3
CY		66	20	5	0	5	4
LV		30	40	3	0	1	26
LT		52	36	3	0	0	9
LU		36	27	5	3	6	23
HU		35	48	6	0	1	10
MT		37	27	10	3	0	23
NL		43	31	4	0	2	20
AT		17	45	18	2	2	16
PL		40	39	10	0	0	11
PT		13	63	6	3	0	15
RO		17	53	12	2	0	16
SI		27	45	11	1	3	13
SK		34	49	10	1	0	6
FI		56	25	4	0	3	12
SE		32	30	7	2	10	19
UK		52	19	7	0	0	22






























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QB6 How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet.

(%)

		Very confident	Fairly confident	Not very confident	Not at all confident	Don't know	Total 'Confident'	Total 'Not confident'
EU28		12	19	19	39	11	31	58
BE		6	22	22	45	5	28	67
BG		24	21	8	30	17	45	38
CZ		11	22	24	34	9	33	58
DK		22	17	20	34	7	39	54
DE		11	16	19	46	8	27	65
EE		19	20	15	33	13	39	48
IE		16	22	18	35	9	38	53
EL		13	24	22	37	4	37	59
ES		9	14	17	54	6	23	71
FR		11	10	14	48	17	21	62
HR		15	29	23	28	5	44	51
IT		14	25	20	25	16	39	45
CY		24	14	12	47	3	38	59
LV		27	14	15	37	7	41	52
LT		28	24	16	27	5	52	43
LU		12	13	19	38	18	25	57
HU		16	28	17	32	7	44	49
MT		18	20	5	39	18	38	44
NL		6	8	23	47	16	14	70
AT		10	23	22	34	11	33	56
PL		17	32	17	20	14	49	37
PT		4	28	22	38	8	32	60
RO		16	28	21	20	15	44	41
SI		14	15	21	45	5	29	66
SK		10	18	23	39	10	28	62
FI		11	16	24	43	6	27	67
SE		7	14	19	56	4	21	75
UK		11	15	21	45	8	26	66

QB7 From your point of view, what are the main reasons for smoking black market cigarettes? (MAX. 2 ANSWERS)
(%)

		They are cheaper		They taste better		They are easily available		You would never buy black market cigarettes (SPONTANEOUS)		Other (SPONTANEOUS)		None (SPONTANEOUS)		Don't know
		EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	
EU28		75	1	2	1	9	0	11	-1	3	1	1	-1	6
BE		78	8	1	-1	7	1	10	-6	6	5	1	-3	3
BG		69	-6	1	0	12	-1	11	-1	2	2	1	1	15
CZ		78	2	3	0	9	1	5	-5	6	4	1	0	4
DK		79	-5	2	2	7	2	9	5	4	0	1	1	5
DE		74	-1	1	1	7	-1	18	4	1	0	0	-3	5
EE		86	3	1	0	6	-2	5	-2	2	1	0	0	5
IE		78	-3	3	2	19	4	8	3	3	2	0	-1	5
EL		84	2	0	-1	15	2	10	-2	1	-1	0	0	4
ES		74	1	2	0	7	0	6	-1	5	1	3	1	10
FR		85	-6	1	0	9	-1	5	3	2	1	1	0	5
HR		74	4	3	-1	18	0	13	0	2	0	0	0	4
IT		66	-2	3	0	11	2	18	6	3	-1	2	1	5
CY		90	9	1	0	16	1	2	-5	1	-2	1	0	4
LV		87	-2	1	0	10	-1	5	2	2	-1	1	1	3
LT		93	-2	2	1	6	-1	3	1	2	1	0	0	1
LU		71	1	1	0	7	0	6	-14	7	3	4	4	9
HU		67	1	4	2	14	0	17	-2	1	-1	2	-2	6
MT		80	-11	1	1	6	1	3	3	2	0	1	1	14
NL		82	31	1	1	5	2	4	-18	5	0	2	-12	6
AT		62	-6	3	1	11	-7	21	5	4	0	3	2	6
PL		73	2	3	1	9	-3	10	-4	4	2	1	0	6
PT		73	11	1	-2	8	-4	10	-8	2	1	3	0	10
RO		49	-9	6	4	13	1	26	6	4	2	2	0	6
SI		75	-1	2	1	8	0	10	1	6	2	3	2	5
SK		77	-7	2	0	14	1	12	7	4	2	1	1	4
FI		77	3	1	0	7	0	7	-1	3	0	3	-1	8
SE		96	0	1	0	10	-4	1	0	2	-1	0	0	1
UK		77	7	2	1	8	1	5	-10	6	5	2	-1	6






























QB8a Within the EU, which of the following do you think is the most important source of revenue for organised crime? (%)

		Black market cigarettes		Counterfeiting (fake) of goods (e.g. clothes, bags)		Illegal gambling		Prostitution and human trafficking		Illegal drugs		Illicit trading in firearms		Other (SPONTANEOUS)		None (SPONTANEOUS)		Refusal (SPONTANEOUS)		Don't know
		EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	
EU28		6	0	9	0	4	1	17	0	49	3	9	-3	0	0	1	0	0	0	5
BE		4	1	11	2	4	1	17	2	47	-4	16	1	0	-1	0	0	0	0	1
BG		4	-1	4	-1	5	3	22	-1	43	0	13	1	0	-1	0	-1	1	0	8
CZ		3	-3	12	-3	6	-1	10	1	52	11	14	1	0	0	1	-1	1	0	1
DK		4	0	15	2	2	1	11	-4	56	-1	7	1	0	0	0	0	1	1	4
DE		7	1	10	-3	5	3	18	-3	50	5	4	-1	1	0	0	-1	0	0	5
EE		5	-1	8	0	2	1	7	-3	60	0	7	1	0	0	1	0	0	0	10
IE		8	-3	9	2	2	1	9	-5	62	4	3	0	0	0	0	0	0	0	7
EL		4	0	5	0	4	-2	15	1	50	3	19	-1	0	-1	0	0	0	0	3
ES		2	1	5	0	2	0	22	1	50	7	13	-5	1	1	0	-1	0	-1	5
FR		6	1	8	0	3	2	12	1	49	0	16	-4	0	0	0	0	0	0	6
HR		6	0	9	-3	3	-4	21	1	44	12	14	0	0	0	0	-1	0	-1	3
IT		4	0	10	1	7	1	20	0	47	8	8	-7	0	0	1	0	2	1	1
CY		2	-1	2	0	3	-1	11	-2	72	14	8	-8	0	0	0	-2	0	0	2
LV		11	-2	8	3	9	2	11	1	46	-2	8	-2	2	1	1	1	0	-1	4
LT		9	-1	3	-1	4	1	14	1	61	2	7	0	0	0	0	-1	0	0	2
LU		3	-3	5	-1	2	0	16	5	50	-3	19	2	0	0	1	0	1	-1	3
HU		7	-6	15	2	5	1	16	-2	39	3	12	1	1	1	0	0	0	0	5
MT		3	-3	5	-1	4	-1	13	2	59	0	8	-2	0	0	0	0	0	0	8
NL		2	1	8	0	1	-1	9	-7	71	10	6	-3	0	0	0	0	1	1	2
AT		11	0	10	0	9	3	16	-3	39	2	8	2	0	-1	1	-1	2	0	4
PL		9	-1	11	4	4	-1	15	3	41	0	9	-2	1	1	1	-1	0	-1	9
PT		2	0	3	-1	2	0	13	-10	59	11	11	-3	0	0	2	1	0	0	8
RO		10	4	11	4	6	2	24	-1	23	-9	12	0	1	0	6	5	0	-1	7
SI		4	2	7	1	3	1	12	0	53	3	18	0	1	0	0	-1	0	-2	2
SK		7	2	9	2	3	-1	18	-1	38	0	20	-1	0	0	0	0	1	0	4
FI		7	3	7	2	1	0	10	-3	66	-1	7	2	0	-1	0	0	0	-1	2
SE		12	-5	6	1	3	0	14	2	59	4	5	-1	0	-1	0	0	0	0	1
UK		5	-1	13	-1	2	0	16	4	55	2	3	-1	0	0	0	-1	0	0	6

QB8T Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)
(%)

		Black market cigarettes		Counterfeiting (fake) of goods (e.g. clothes, bags)		Illegal gambling		Prostitution and human trafficking		Illegal drugs		Illicit trading in firearms		Other (SPONTANEOUS)		None (SPONTANEOUS)		Refusal (SPONTANEOUS)		Don't know
		EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	
EU28		15	1	24	1	10	1	42	1	71	2	23	-4	1	1	1	0	0	0	5
BE		9	3	30	6	9	-1	42	0	72	1	34	-3	0	-1	0	0	0	0	1
BG		13	-2	12	0	11	3	46	0	68	0	31	2	0	-1	0	-1	1	0	8
CZ		12	-3	30	1	15	-2	29	2	76	13	32	2	0	0	2	0	0	-1	1
DK		13	2	40	9	5	1	34	-14	77	-1	19	1	0	-1	0	0	1	1	4
DE		16	1	30	1	12	4	45	-1	73	1	11	-2	1	0	0	-1	0	0	5
EE		18	-3	23	2	7	2	27	-8	78	1	22	2	0	0	1	0	0	0	10
IE		24	-6	29	3	11	6	33	-4	76	0	10	0	0	0	1	1	0	0	7
EL		11	-1	12	-2	10	-4	38	2	75	5	45	0	0	-1	0	0	0	-1	3
ES		5	1	15	1	8	2	57	2	74	7	28	-5	1	1	0	-1	0	-1	5
FR		13	2	25	4	7	2	31	1	72	-1	36	-9	1	1	1	1	0	0	6
HR		16	2	24	1	8	-5	45	1	68	15	32	0	0	-1	0	-1	0	-1	3
IT		11	2	21	0	19	3	49	5	69	5	23	-10	0	0	1	0	2	1	2
CY		10	-1	6	-1	13	1	48	10	90	7	28	-12	0	0	1	-1	0	0	2
LV		25	-4	19	4	22	4	29	1	69	-3	19	-4	2	1	1	1	0	-1	4
LT		29	0	11	3	12	1	39	-1	81	-1	21	-1	0	0	0	-1	0	0	2
LU		7	-4	17	-5	10	3	43	5	72	-6	36	1	1	1	3	2	0	-2	3
HU		18	-8	32	4	13	2	35	-1	61	-1	28	2	1	1	0	0	0	0	5
MT		13	-8	13	-5	16	-1	43	15	80	-4	16	-8	0	0	0	0	0	0	7
NL		8	3	28	3	8	-1	36	-9	86	6	26	0	0	0	0	0	1	1	2
AT		25	1	23	0	22	7	36	-3	60	-1	17	4	1	-1	1	-1	2	-1	4
PL		26	3	25	6	9	-4	33	6	62	0	19	-6	1	0	1	-1	0	-1	9
PT		7	2	14	3	8	2	41	-14	76	2	30	-3	0	0	2	1	0	0	8
RO		19	6	23	9	13	3	46	-2	44	-13	26	-4	1	0	7	6	1	0	7
SI		11	6	19	4	9	3	35	1	75	1	43	0	1	-1	1	0	0	-2	2
SK		15	3	21	3	9	-2	41	1	61	-2	40	-4	0	0	0	0	1	0	4
FI		19	7	25	6	4	-1	42	-5	85	0	19	-1	0	-2	0	-1	0	-1	2
SE		27	-6	18	-2	9	2	43	6	81	3	19	-1	1	1	0	0	0	0	1
UK		19	2	30	-5	4	-1	42	5	77	5	12	0	0	0	0	-1	0	0	6

QB9 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)
(%)

		Encouraging smoking among young people by making cigarettes cheaper and easier to obtain		Loss of taxes for the state		Revenue for organised crime		Increase in consumption		Quality of these cigarettes is not controlled		Other (SPONTANEOUS)		None (SPONTANEOUS)		Don't know
		EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	EB90.4	Diff. EB90.4 - EB84.4	
EU28		28	2	40	-3	38	3	13	2	33	0	2	0	1	0	6
BE		30	1	32	-8	42	6	15	0	37	2	2	1	0	0	1
BG		20	3	46	-4	38	2	12	1	30	-3	1	0	1	-1	11
CZ		17	-2	58	2	36	0	11	2	33	6	2	1	2	0	2
DK		36	10	40	-5	48	-6	15	1	15	-1	2	0	1	0	6
DE		27	1	56	-1	39	3	8	-1	28	-3	1	0	0	-2	4
EE		25	1	62	-3	27	-5	10	4	24	-2	3	1	2	0	7
IE		26	2	43	7	41	2	15	4	34	-7	2	1	1	0	5
EL		20	6	68	-5	36	9	13	2	46	-2	1	-1	0	0	2
ES		31	8	36	-3	30	6	14	0	36	1	2	-3	0	-1	9
FR		35	0	37	-3	31	1	17	2	38	-2	2	1	1	1	6
HR		32	6	41	-1	40	13	14	-1	35	9	1	0	1	-2	3
IT		30	9	29	-4	49	0	15	3	30	-2	1	-1	2	1	4
CY		34	2	59	0	31	-4	16	5	30	2	0	-1	1	-1	2
LV		32	2	61	-1	30	1	8	0	23	1	3	0	1	1	5
LT		23	0	71	-2	48	6	15	4	15	4	2	1	1	-1	1
LU		23	-9	30	-11	33	-3	15	1	31	-2	2	-1	3	2	7
HU		28	-3	33	3	28	-1	13	2	41	4	1	-1	3	-1	5
MT		24	-13	59	9	46	18	14	-10	13	-4	1	1	0	0	11
NL		28	3	29	-7	50	4	12	3	46	10	3	1	0	-1	3
AT		34	5	41	-11	35	1	19	8	41	3	3	1	3	1	2
PL		21	0	42	4	33	-1	16	5	27	4	2	0	1	-2	9
PT		19	-12	49	4	39	7	15	4	30	-3	1	1	2	1	11
RO		33	8	36	-14	26	-5	19	8	32	5	1	0	6	5	7
SI		26	-3	45	2	34	7	8	4	28	-1	2	-2	4	2	4
SK		25	6	53	-9	39	3	12	6	28	2	2	1	0	0	4
FI		31	8	46	-9	46	2	10	0	35	5	1	0	1	0	4
SE		45	1	33	1	62	0	17	-6	14	4	2	2	0	0	2
UK		26	-3	31	-1	39	11	9	1	33	-5	4	3	1	-1	8

