



# Special Eurobarometer 443

## Summary

# Public perception of illicit tobacco trade

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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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Special Eurobarometer 443 – Wave EB84.4 – TNS opinion & social



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(DG COMM "Strategy, Corporate Communication Actions and Eurobarometer" Unit)



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## INTRODUCTION

The European Strategy "*Stepping up the fight against cigarette smuggling and other forms of illicit trade in tobacco products*" was set out in a Policy Communication issued by the European Commission in June 2013<sup>1</sup>. Member States expressed their support via the Council Conclusions<sup>2</sup> adopted in December 2013.

The estimated loss to the EU and national budgets from cigarette smuggling and other forms of illicit trade in tobacco products, is EUR 10 billion per year. The effect of this illegal activity is both damaging to public health and proven to finance organised crime. The tobacco black market also targets vulnerable groups in society, undermining strategies to dissuade the consumption of tobacco products. The 2013 Strategy was accompanied by an Action Plan<sup>3</sup> including a targeted action<sup>4</sup> on awareness raising emphasising the links between cigarette smuggling and organised crime.

Against this backdrop, this report brings together the findings of the Eurobarometer Survey on the "Public perception of illicit tobacco trade", which was conducted in the 28 Member States of the EU. The aim of the survey was to uncover and explore the attitudes and opinions of Europeans in regard to the following topics:

- Perceptions of the black market in cigarettes;
- Thoughts on the key revenue sources of organised crime groups;
- Opinions on the main reasons for smoking illicit cigarettes;

This survey was carried out by TNS Opinion & Social network in the 28 Member States of the European Union between 28 November and 7 December 2015. Some 27,672 respondents from different social and demographic groups were interviewed face-to-face at home and in their mother tongue. The survey was commissioned by the European Anti-Fraud Office (OLAF).

The methodology<sup>5</sup> used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Strategy, Corporate Communication Actions and Eurobarometer" Unit)<sup>6</sup>. The technical specifications related to the manner in which interviews were conducted by the institutes within the TNS Opinion & Social network and to the confidence intervals are annexed to this report. These annexes also include the questionnaire and the result tables.

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<sup>1</sup> [http://ec.europa.eu/anti\\_fraud/documents/2013-cigarette-communication/communication\\_en.pdf](http://ec.europa.eu/anti_fraud/documents/2013-cigarette-communication/communication_en.pdf)

<sup>2</sup> [https://ec.europa.eu/anti-fraud/sites/antifraud/files/docs/body/council\\_conclusions\\_en.pdf](https://ec.europa.eu/anti-fraud/sites/antifraud/files/docs/body/council_conclusions_en.pdf)

<sup>3</sup> [https://ec.europa.eu/anti-fraud/sites/antifraud/files/docs/body/action\\_plan\\_en.pdf](https://ec.europa.eu/anti-fraud/sites/antifraud/files/docs/body/action_plan_en.pdf)

<sup>4</sup> Action 1.4 p.3

<sup>5</sup> Purchasing illicit tobacco products is a subject in which social norms play a role. The figures presented here are the results of an opinion survey and responses given may differ from real behaviour. They may also differ from other surveys carried out in other contexts, with differences in the formulation of the questions. Moreover, margins of error are inherent to every public opinion survey.

<sup>6</sup> [http://ec.europa.eu/public\\_opinion/index\\_en.htm](http://ec.europa.eu/public_opinion/index_en.htm)

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

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

\* 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.*

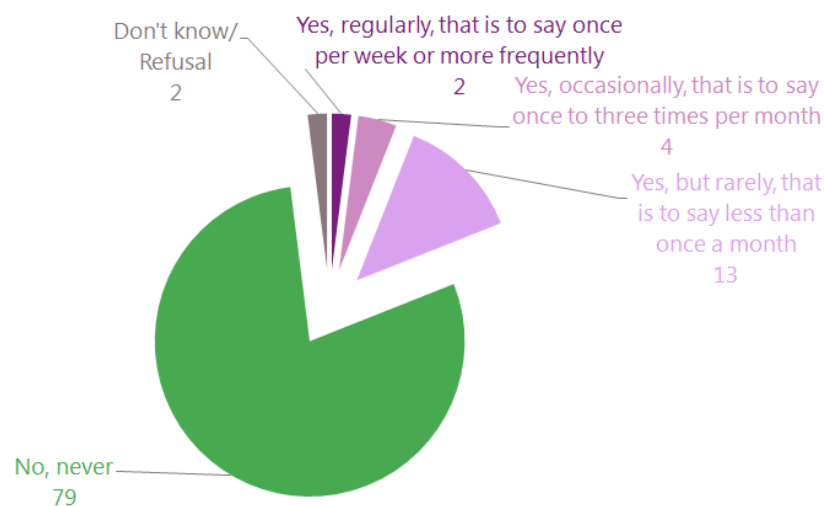
## I. PENETRATION OF THE BLACK MARKET IN CIGARETTES

### - Almost a fifth of respondents (19%) have been offered black market cigarettes -

Nearly eight in 10 respondents (79%) say that they have **never** been offered black market cigarettes while just under one in five respondents say that they have been offered black market cigarettes (19%).

Of these, just over one in 10 respondents say that they have **rarely** been offered black market cigarettes, that is to say less than once a month, (13%), while fewer than one in twenty say they have been offered them **occasionally**, meaning once to three times per month, (4%) or **regularly**, meaning once per week or more frequently (2%).

QC2 Have you ever been offered black market cigarettes to buy or smoke?  
(% - EU)



Nearly six in 10 people in Latvia (56%) say that they **have been offered black market cigarettes**, as have at least a third of respondents in Lithuania (35%) and Bulgaria and Croatia (both 33%).

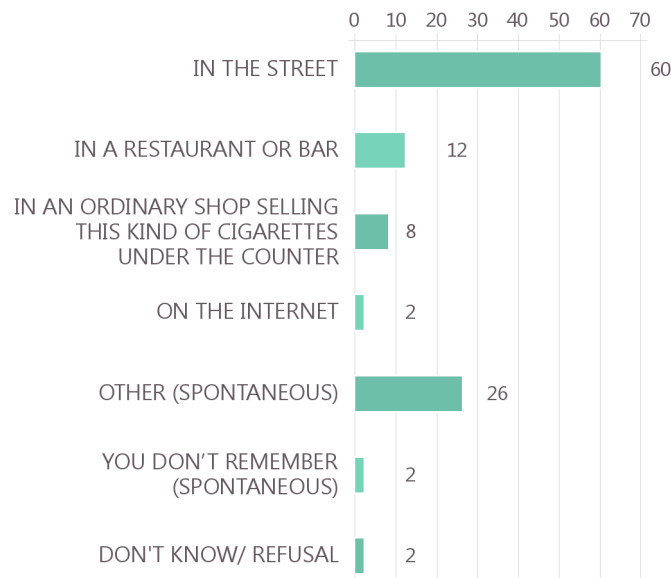
At least nine in 10 respondents in Luxembourg (94%) and Portugal and Belgium (both 90%) say that they have **never** been offered black market cigarettes while, at the other end of the scale, around four in 10 respondents in Latvia (43%) and at least six in 10 in Lithuania and Bulgaria (both 64%) say this.

## II. WHERE DO CONSUMERS GET THEIR BLACK MARKET CIGARETTES?

**- Six in 10 respondents (60%) say they were offered black market cigarettes in the street -**

Of those who said that they have been offered black market cigarettes, six in 10 claim that they were offered black market cigarette **in the street** (60%). Around a tenth of respondents were offered them in **a restaurant or bar** (12%) or in **an ordinary shop selling them under the counter** (8%). Only a very small proportion of respondents say they were offered this type of cigarettes **on the Internet** (2%).

**QC3** Where were you offered this type of cigarettes?  
(MULTIPLE ANSWERS POSSIBLE)  
(% - EU)



*Respondents who have been offered black market cigarettes (N=5,346)*

Looking at the overall picture, at least two thirds of respondents who have been offered black market cigarettes in 10 Member States say that they were offered them **in the street**. Over eight in 10 respondents in Romania (83%) say they were offered this type of cigarettes **in the street**, followed by slightly fewer in Luxembourg (79%) and Greece and Bulgaria (both 76%).

At least a quarter of respondents who have been offered black market cigarettes in Belgium (28%), Austria (27%) and the United Kingdom (25%) say they were offered this type of cigarettes **in a restaurant or bar**. Conversely, this answer is given the least in Estonia and Latvia (both 1%) and Lithuania (3%).



### III. REASONS FOR SMOKING BLACK MARKET CIGARETTES

**- A majority of respondents (74%) think that one of the main reasons for smoking is that they are cheaper -**

Nearly three-quarters of respondents say that one of main reasons for smoking black market cigarettes is that **they are cheaper** (74%). The second most given reason is the fact that they are **easily available**, although only 9% of Europeans say this. Only 1% of respondents hold the view that **they taste better**.

It is worth noting that around one in 10 respondents spontaneously say that **they would never buy black market cigarettes** (12%) and a further 7% are unable to give a reason.

**QC4** From your point of view, what are the main reasons for smoking black market cigarettes? (MAX. 2 ANSWERS)  
(% - EU)



Overall, a majority of respondents in every Member State, and at least 70% in 22 countries, believe that one of the main reasons for smoking black market cigarettes is because **they are cheaper**. This proportion ranges from over nine in 10 respondents in Sweden (96%), Lithuania (95%) and Malta and France (both 91%) to less than two thirds of respondents in the Netherlands (51%), Romania (58%) and Portugal (62%).

#### IV. MAIN SOURCES OF REVENUE FOR ORGANISED CRIME

**- Nearly seven in 10 people (69%) say that illegal drugs are one of the most important sources of revenue for organised crime, while only 14% consider black market cigarettes -**

When respondents are asked what they think the **single** most important source of revenue for organised crime is, **illegal drugs** stand out with almost half (46%) mentioning this item. **Prostitution and human trafficking** (17%) and the **illicit trading in firearms** (12%) follow by a distance, with more than a tenth of respondents mentioning them.

Respondents were given an opportunity to say what they thought the **second** most important source of revenue of crime is, and when combining the answers of the two questions, a similar pattern can be observed,

Nearly seven in 10 respondents (69%) identify **illegal drugs** as one of the most important sources of income for organised crime. At least four in 10 (41%) mention **prostitution and human trafficking** as an important source of revenue for organised crime, while around a quarter of respondents mention **illicit trading in firearms** (27%) and **counterfeiting of goods such as clothes or bags** (23%). Just over one in 10 respondents (14%) cite **black market cigarettes** and **illegal gambling** is mentioned by less than a tenth of respondents (9%).

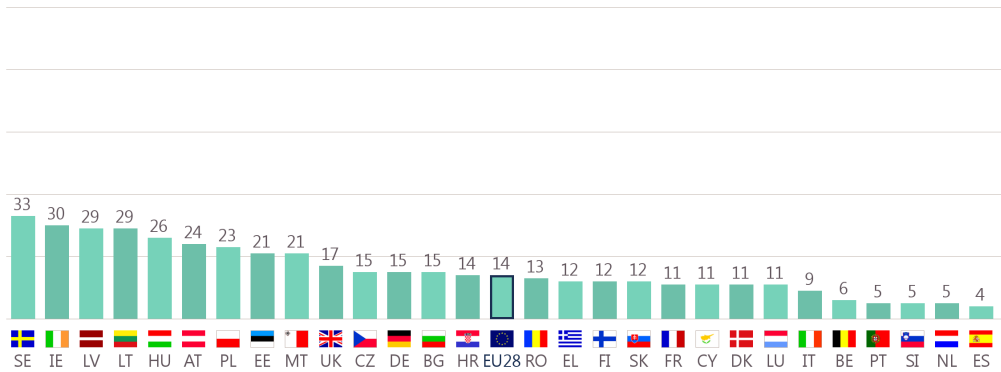
**QC5T** Which are the most important sources of revenue for organised crime within the EU? And which do you think is the second most important? (MAX. 2 ANSWERS)  
(% - EU)



In all countries, **illegal drugs** is the most mentioned answer. Respondents in Finland (85%), Malta (84%) and Cyprus (83%) 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, the results are still relatively high in Croatia (53%), Romania (57%) and Austria (61%).

In all of the countries, a third of respondents or less think that **black market cigarettes** is one of the most important sources of revenue for organised crime. At one extreme, less than a tenth of people hold this view in Spain (4%), the Netherlands, Slovenia, Portugal (all 5%), Belgium (6%) and Italy (9%). Conversely, respondents in Sweden (33%), Ireland (30%), Lithuania and Latvia (both 29%) are the most likely to mention black market cigarettes.

**QC5T** Which are the most important sources of revenue for organised crime within the EU? And which do you think is the second most important? (MAX. 2 ANSWERS)  
(% - BLACK MARKET CIGARETTES)

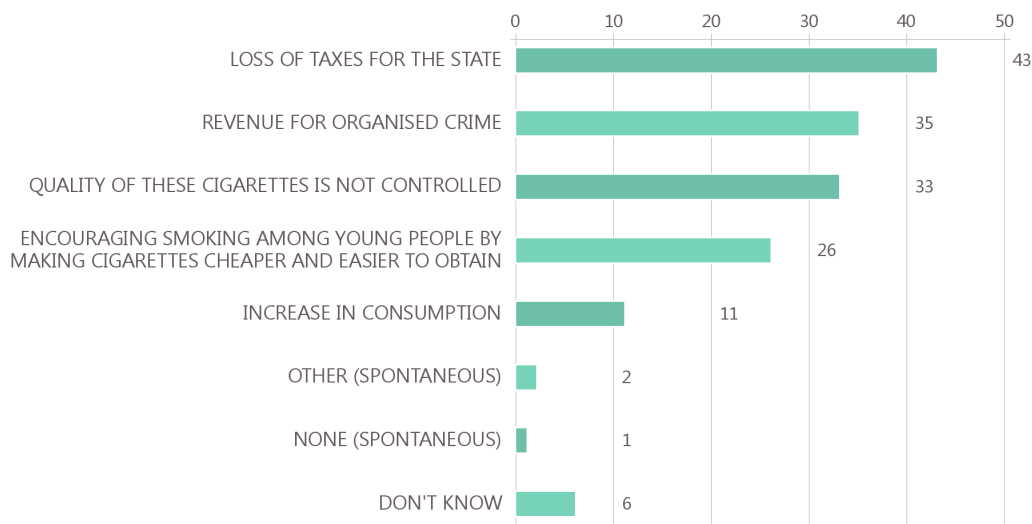


## V. MAIN PROBLEMS OF THE BLACK MARKET IN CIGARETTES

**- In 20 of the 28 Member States, the loss of taxes for the state is the most mentioned problem of the black market in cigarettes -**

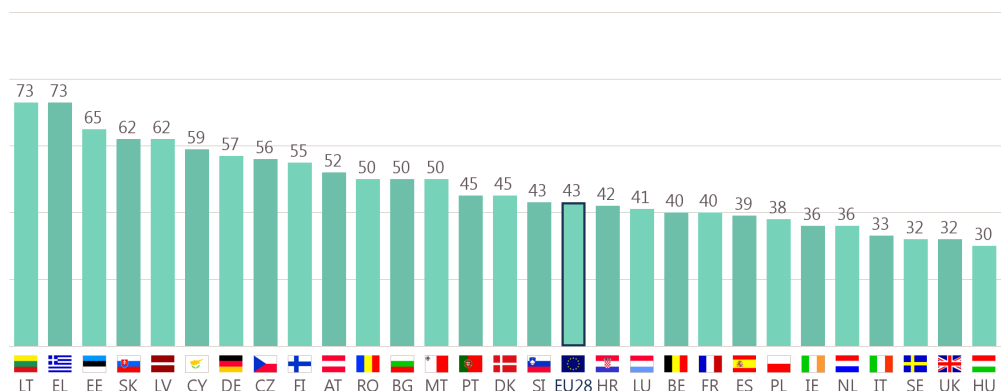
**The loss of taxes for the state** is seen as one of the main problems of the black market in cigarettes by at least four in 10 respondents (43%). At least a third mention **revenue for organised crime** (35%) and **the lack of quality control of these cigarettes** (33%), while just over a quarter of respondents mention **encouraging smoking among young people by making cigarettes cheaper and easier to obtain** (26%). Finally, just over one in 10 respondents (11%) consider **the increase in consumption** as one of the main problems of the black market in cigarettes.

QC6 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)  
(% - EU)



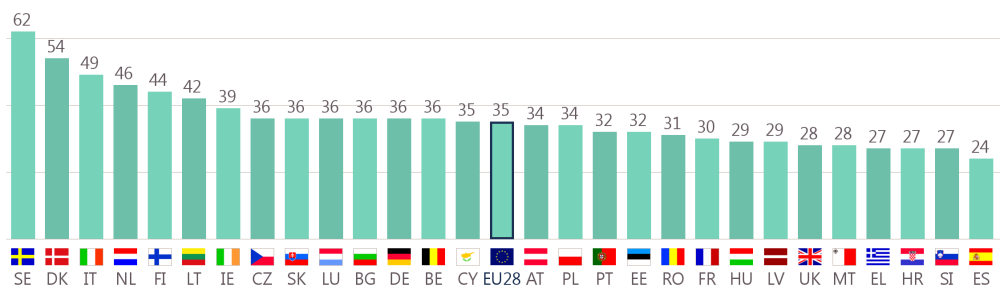
In 20 of the 28 Member States **the loss of taxes for the state** is the most mentioned answer. Nearly three-quarters of respondents in Greece and Lithuania (both 73%) and nearly two-thirds in Estonia (65%) cite the loss of taxes for the state as one of the main problems of the black market in cigarettes.

QC6 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%), Denmark (54%) and Italy (49%) are the most likely to mention **revenue for organised crime** as one of the main problems of the black market in cigarettes, while respondents in Spain (24%), Slovenia, Croatia and Greece (all 27%) are least likely to do so.

QC6 From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)  
(% - REVENUE FOR ORGANISED CRIME)



**The lack of quality control of these cigarettes** is mentioned most by respondents in Greece (48%), Ireland (41%) and France (40%) and least by people in Sweden (10%), Lithuania (11%) and Denmark (16%).

**Encouraging smoking among young people by making cigarettes cheaper and easier to obtain** is mentioned most in Sweden (44%), Malta (37%) and France (35%) and least in Greece (14%), Bulgaria (17%), Slovakia and the Czech Republic (both 19%).

The view that one of the main problems of the black market in cigarettes is the fact that it leads to an **increase in cigarette consumption** is held most widely by respondents in Malta (24%), Sweden (23%), and Belgium, France and Croatia (all 15%) and least by respondents in Slovenia (4%), Estonia and Slovakia (both 6%).

## CONCLUSION

The results of this survey show that there is a distinct gap between the reality of the black market in cigarettes and the perception Europeans have of the issue.

When respondents are asked what they think the main problems are of the black market in cigarettes, most identify the loss of taxes for the state. Furthermore, only a small proportion of European recognise that the black market is one of the key revenue sources for organised crime groups.

When looking at the reasons for smoking black market cigarettes, the price is by far the most recognised reason, both among smokers and non-smokers.

Considering all respondents, when asked whether they have been offered black market cigarettes, only around a fifth say this has been the case. This proportion however rises to over a third among those who currently smoke. Geographically, black market cigarettes have larger penetration in Eastern European countries than elsewhere. In terms of where people have been offered black market cigarettes, 'in the street' is by far the most common place. In fact, at least two thirds of respondents who have been offered black market cigarettes in 10 Member States mention this.

In light of this, it is clear that Europeans are concerned how the cigarette smuggling and the illicit trade in other tobacco products is hurting public revenues. The survey does suggest however that there may be a case to raise awareness among the citizens that this illicit trade is one of the main revenue sources for organised crime gangs.

The survey provides detailed information from all 28 Member States, based on a number of social and demographic factors. The finding of this report may be useful for Member States when considering and designing awareness raising activities to fight the illicit cigarette trade. A factsheet for each Member State is available.

## TECHNICAL SPECIFICATIONS

Between the 28<sup>th</sup> November and the 7<sup>th</sup> December 2015, TNS opinion & social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the wave 84.4 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, “Strategy, Corporate Communication Actions and Eurobarometer” Unit.

The wave 84.4 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	DATES FIELDWORK		POPULATION 15+	PROPORTION EU28
BE	Belgium	TNS Dimarso	1.016	28/11/15	07/12/15	9.263.570	2,18%
BG	Bulgaria	TNS BBSS	1.025	28/11/15	07/12/15	6.294.563	1,48%
CZ	Czech Rep.	TNS Aisa	1.045	28/11/15	07/12/15	8.955.829	2,11%
DK	Denmark	TNS Gallup DK	1.012	28/11/15	07/12/15	4.625.032	1,09%
DE	Germany	TNS Infratest	1.527	28/11/15	07/12/15	71.283.580	16,79%
EE	Estonia	TNS Emor	1.023	28/11/15	07/12/15	1.113.355	0,26%
IE	Ireland	Behaviour & Attitudes	1.000	28/11/15	07/12/15	3.586.829	0,84%
EL	Greece	TNS ICAP	1.005	28/11/15	07/12/15	8.791.499	2,07%
ES	Spain	TNS Spain	1.006	28/11/15	07/12/15	39.506.853	9,31%
FR	France	TNS Sofres	1.038	28/11/15	07/12/15	51.668.700	12,17%
HR	Croatia	HENDAL	1.008	28/11/15	07/12/15	3.625.601	0,85%
IT	Italy	TNS Italia	967	28/11/15	07/12/15	51.336.889	12,09%
CY	Rep. Of Cyprus	CYMAR	501	28/11/15	07/12/15	724.084	0,17%
LV	Latvia	TNS Latvia	1.008	28/11/15	07/12/15	1.731.509	0,41%
LT	Lithuania	TNS LT	1.001	28/11/15	07/12/15	2.535.329	0,60%
LU	Luxembourg	TNS ILReS	502	28/11/15	07/12/15	445.806	0,11%
HU	Hungary	TNS Hoffmann	1.028	28/11/15	07/12/15	8.477.933	2,00%
MT	Malta	MISCO	500	28/11/15	07/12/15	360.045	0,08%
NL	Netherlands	TNS NIPO	1.042	28/11/15	07/12/15	13.901.653	3,27%
AT	Austria	ipr Umfrageforschung	1.001	28/11/15	07/12/15	7.232.497	1,70%
PL	Poland	TNS Polska	1.006	28/11/15	07/12/15	32.736.685	7,71%
PT	Portugal	TNS Portugal	1.022	28/11/15	07/12/15	8.512.269	2,01%
RO	Romania	TNS CSOP	1.002	28/11/15	07/12/15	16.880.465	3,98%
SI	Slovenia	RM PLUS	1.003	28/11/15	07/12/15	1.760.726	0,41%
SK	Slovakia	TNS Slovakia	1.036	28/11/15	07/12/15	4.580.260	1,08%
FI	Finland	TNS Gallup Oy	999	28/11/15	07/12/15	4.511.446	1,06%
SE	Sweden	TNS Sifo	1.028	28/11/15	07/12/15	7.944.034	1,87%
UK	United Kingdom	TNS UK	1.321	28/11/15	07/12/15	52.104.731	12,27%
	TOTAL EU28		27.672	28/11/15	07/12/15	424.491.772	100%*

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

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 II<sup>1</sup> (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), TNS opinion & social 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
<b>N=1000</b>	<b>1,4</b>	<b>1,9</b>	<b>2,2</b>	<b>2,5</b>	<b>2,7</b>	<b>2,8</b>	<b>3,0</b>	<b>3,0</b>	<b>3,1</b>	<b>3,1</b>	<b>N=1000</b>
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%	

<sup>1</sup> Figures updated in August 2015