

Results of a national public opinion survey on the perception of plain packaging on tobacco one year after its implementation in the UK

May 2018



Background

The UK has a number of regulations regarding the advertising, smoking, display and packaging of tobacco products: it is illegal to sell cigarettes to under 18s, advertising is banned for tobacco brands, smoking is banned in pubs, restaurants, on public transport and offices, cigarettes must be concealed in cabinets in shops and under new EU rules, graphic and written health warnings must cover 65% of the pack's surface.

In May 2017, the UK government introduced what is known as Plain or Standardised packaging in addition to the new EU requirements. Under the Plain packaging regulation, all packs must now be produced in the same drab brown colour. Tobacco companies are no longer allowed to display any brand logos and brand names must be written in the same prescribed font on the 35% of the pack that is not occupied by health warnings. Tobacco packaging in the UK for three brands side by side now looks like this:



Australia was the first country to introduce plain/standardised packaging for tobacco in 2012. The UK followed in 2017. There was no requirement from the EU for the UK to introduce plain packaging. However, prior to this, the Government carried out two Impact Assessments which both stated that it was difficult to conclude how plain packaging had impacted smoking levels in Australia.

HM Government's Better Regulation principles demand "robust and compelling" evidence before making new regulations. Before turning plain packaging into law, the Government conducted three public consultations over a period of 6 years.

- After the first public consultation, the Government chose to ban the open display of tobacco in shops, and postponed a decision on plain packaging.
- The second public consultation in 2012 had over 668,000 respondents, with 1/3 in favour and 2/3 against plain packaging. The UK government chose *"to wait until the emerging impact of the decision in Australia can be measured before making a final decision"*.
- The third public consultation took place over a 6-week period – the shortest period recommended by the Cabinet Office.

In July 2013, UK Health Minister Jeremy Hunt said that any decision on plain packaging would be postponed: *"We have decided to wait until the emerging impact of the decision in Australia can be measured, and then we will make a decision in England."*

When the Government decided to go ahead with plain packaging in 2017, it said that it was difficult to conclude how plain packaging had impacted smoking levels in Australia. Having considered all the evidence from the three public consultations, the Government decided to proceed with plain packaging, saying it was *"a proportionate and justified response to the considerable public health harm from smoking tobacco."*

In May 2017, the Australian Institute of Health and Welfare released figures showing that *"...while smoking rates have been on a long-term downward trend, for the first time in over two decades, the daily smoking rate did not significantly decline over the most recent 3 year period (2013 to 2016)"* – in short, the long-term decline in smoking rates has stalled since the introduction of plain packaging.

Why JTI commissioned this independent survey in the UK

As a tobacco company, JTI is concerned that the claimed success of plain packaging in Australia has been exaggerated and used as a key rationale to justify the early adoption of the measure in the UK. JTI's view is that the policy does not reduce smoking, deprives companies of the use of their brands and trademarks and comes with significant negative consequences.

Five years after the implementation of plain packaging in Australia, and in light of the Australian government's own research in May 2017 – showing that the long-term decline in smoking has stalled – JTI wished to independently research the UK public's views one year on from plain packaging's introduction in the UK.

In the same way Australia's introduction of plain packaging was used as a rationale for the UK, the UK's adoption of plain packaging is now being used by lobby groups to push for its adoption in other countries.

JTI wanted to assess the UK public's views on some key considerations linked to:

- Plain packaging's perceived effectiveness as a policy to reduce smoking in the UK.
- How fairly they believed the policy was evaluated by the UK government.
- Whether the public believe the consequences linked to illegal cigarettes, organised crime and terrorism should also have been researched before plain packaging was introduced.
- The levels of concern about how fairly the government carried out the policy review and decision.
- Whether the introduction of plain packaging on tobacco products creates a dangerous precedent for unnecessary interference with other company's trademarks.

Kantar TNS was contacted as an independent research company to carry out a national survey. Kantar TNS approved and verified the survey before it went into the field. Apart from agreeing on the methodology in terms of sample size and construction, JTI had no sight or input on who Kantar TNS surveyed.

Methodology

Kantar TNS interviewed 2,464 UK adults (18+) online between 12 and 19 April 2018. The survey was regionally and demographically representative of the UK population.

Where percentage results do not sum to 100, this may be a result of rounding or the exclusion of 'don't know', categories. The results for all adults are statistically valid at +/- 2% of probability. Kantar TNS can be contacted directly to answer any questions on the methodology or the way in which the research was conducted.

Interviews were conducted using Kantar TNS Research Express, which uses the Lightspeed access panel as its sample source. Research Express provides quick, reliable market research.

Kantar TNS is one of the world's largest research agencies with experts in over 90 countries and is part of Kantar, one of the world's leading data, insight and consultancy companies. Find out more at www.tnsglobal.com.

For questions regarding methodology please contact Emma Dolby, Associate Director (+44 207 656 5890).

Executive summary of national opinion poll findings

- The majority of UK adults (65%) don't believe plain packaging will reduce smoking.
 - If the UK Government had yet to decide on plain packaging and was considering whether to introduce it today, 69% of UK adults believe they should either reject the policy (35%) or wait for more evidence of its effectiveness from Australia (34%).
- The majority of words UK adults use to describe plain packaging as a policy are negative:

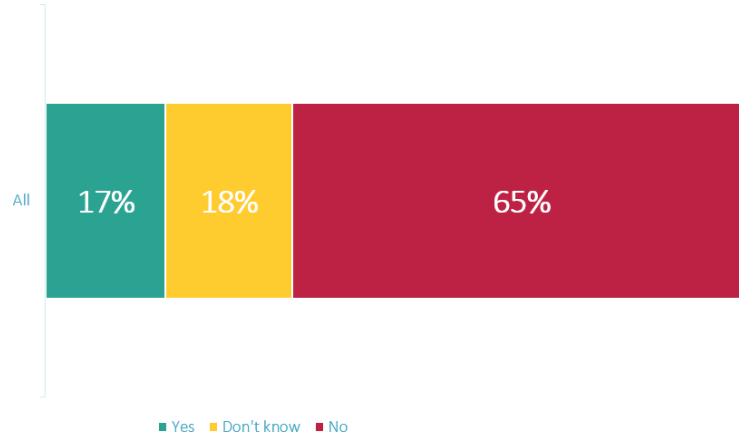


- 65% of UK adults think plain packaging was a poor use of government resources.
- 62% of UK adults believe the introduction of plain packaging in the UK was unnecessary.
- 72% of UK adults believe plain packaging was A LOW PRIORITY policy for the government to introduce compared to other policy areas.
- 75% of UK adults agree that: *'To reduce under-age smoking, it is more important to address how minors get hold of tobacco from friends, acquaintances or family members – rather than plain packaging.'*
- On balance, the UK public believe the government should have waited for more evidence from Australia before introducing plain packaging (46%).
- 61% of UK adults agree (and 69% of smokers) that: *'It is likely that criminals who sell illegal tobacco benefit when tobacco branding is reduced or removed.'*
- 58% of UK adults (and 68% of smokers) think it is likely that plain packaging would make it easier to produce fake cigarette packaging and would increase the number of illegal cigarettes sold in the UK.
- 77% of UK adults think it is important that the government should have carried out thorough and evidenced based evaluation on the impact of plain packaging on the levels of illegal tobacco (including counterfeit) in the UK.
- 72% of UK adults think it is important that the government should have carried out thorough and evidenced based evaluation on the impact of plain packaging and the link between illegal tobacco and terrorist organisations.
- 72% of the UK electorate believes the government wouldn't change (29%) or would be reluctant to change a preferred policy even if the evidence was weighted against it (43%).
- 68% think the UK Government changed the decision-making requirements it had previously set out in order to push through the plain packaging policy.

- Most UK adults (53%) think removing logos and colours from tobacco packaging sets a dangerous precedent for the interference in companies' brands and trademarks.
- 47% of adults agree vs. 20% disagree that tobacco companies should be allowed to brand their products as they choose within the space allowed on packs.
- 55% of smokers and 48% of 18-34 year olds think the government will attempt to introduce plain packaging on alcohol in the future.
- 62% of UK adults think that contributing funding to a global tobacco control project for developing countries – including the introduction of plain packaging – is an inappropriate use of the UK Department of Health's resources.
- On balance, the UK public do not agree that there was enough robust and compelling evidence for plain packaging to be turned into law (39%).
- UK adults are unsure (37%) whether the UK government carried out a fair approach to plain packaging policy making.
- The desire to reduce smoking still means most adults (64%) view any attempt is worth a try – regardless of evidence.

Almost 2/3 of UK adults don't believe plain packaging will reduce smoking.

Q6. Do you think the addition of 'plain' packaging to other existing regulations will reduce smoking rates?



Fieldwork supplier:
Kantar TNS

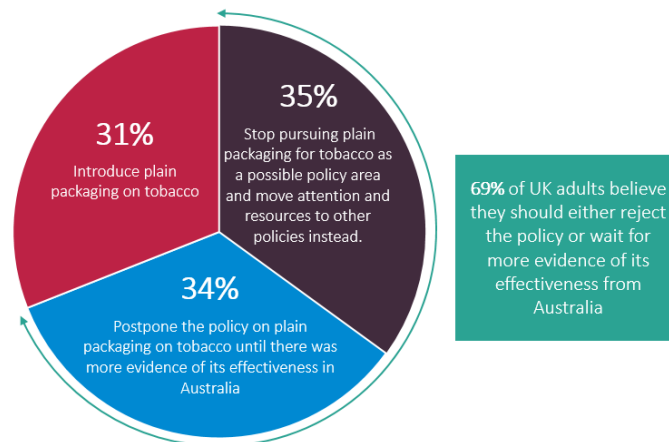
1. April 2018 - Base: All (2,464)

1

- 65% of UK adults don't believe that plain packaging will reduce smoking.

If plain packaging was being considered today, 69% of UK adults believe the government should either reject the policy (35%) or wait for more evidence of its effectiveness from Australia (34%).

Q12. Based on what you now know, if the UK Government had yet to decide on plain packaging and was considering whether to introduce it today, which of the following options would you support?



Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464)

2

- If the UK Government had yet to decide on plain packaging and was considering whether to introduce it today, 69% of UK adults believe they should either reject the policy or wait for more evidence of its effectiveness from Australia.

The majority of words UK adults use to describe plain packaging as a policy are negative.

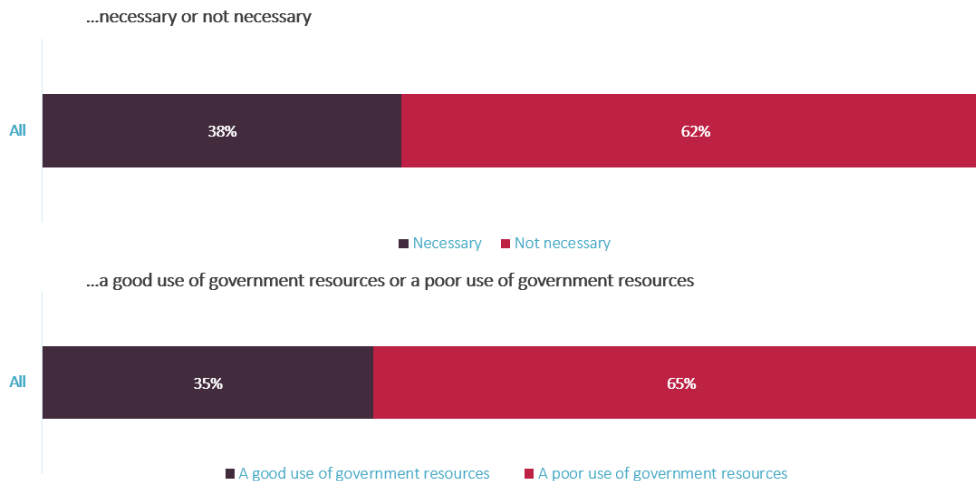
Q17. Thinking about everything you know, how would you describe the UK Government's approach to plain packaging policy making in three or four words?



- The majority of words UK adults use to describe plain packaging as a policy are negative.

62% of UK adults don't believe plain packaging was necessary and 65% believe it was a poor use of government resources.

Q18. Do you believe that the introduction of 'plain packaging' in the UK was:



- 65% of UK adults think plain packaging was a poor use of government resources.
- 62% of UK adults believe the introduction of plain packaging in the UK was unnecessary.

**72% of UK adults think plain packaging was a low priority.
75% think addressing how minors get hold of tobacco is more important than plain packaging.**

Q18. Do you believe that the introduction of 'plain packaging' in the UK was:

...a high priority or low priority policy for the government to introduce compared to other policy areas



Q8. Based on what you know, to what extent do you agree or disagree with the following statements? **To reduce under-age smoking, it is more important to address how minors get hold of tobacco from friends, acquaintances or family members – rather than plain packaging.**



Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464)

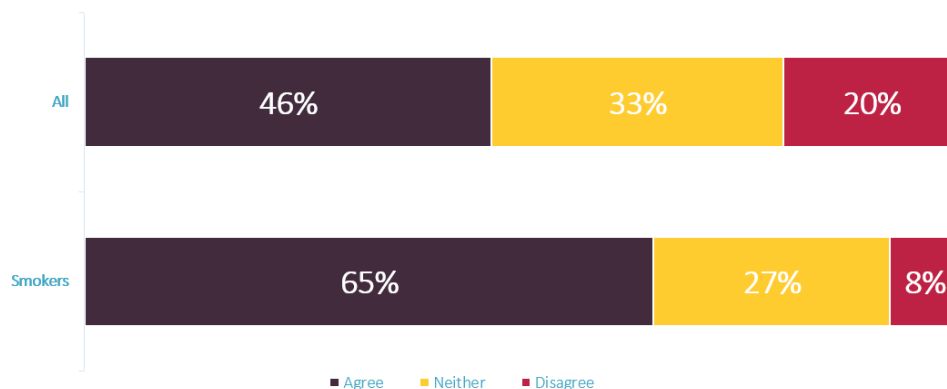
5

- 72% of UK adults believe plain packaging was A LOW PRIORITY policy for the government to introduce compared to other policy areas.
- 75% of UK adults agree that: 'To reduce under-age smoking, it is more important to address how minors get hold of tobacco from friends, acquaintances or family members – rather than plain packaging.'

More than twice as many UK adults (46%) agree vs. disagree (20%) that the government should have waited for more evidence from Australia that the policy was effective before introducing plain packaging in the UK. 65% of regular smokers agree.

Q8. Based on what you know, to what extent do you agree or disagree with the following statements?

Before introducing the plain packaging policy, the UK government should have waited until there was greater and clearer evidence of the policy's effectiveness in reducing smoking in Australia



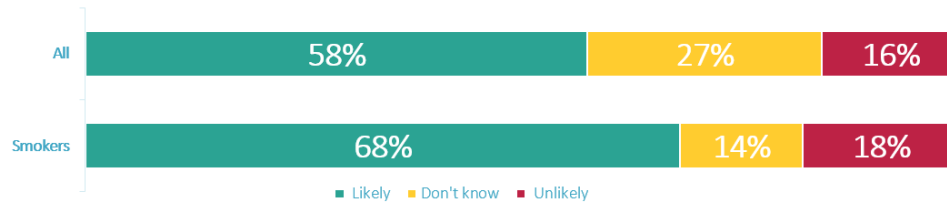
Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464), Regular smokers (514)

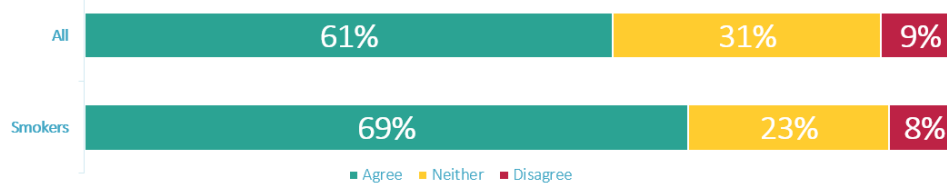
6

3/5 of UK adults think it is likely that criminals will be able to fake cigarettes and increasingly profit from the removal of tobacco branding. Regular smokers think both are more likely.

Q5. Some people say that the change to 'plain' packaging from multiple different brand designs could make it easier to produce fake cigarette packaging and could increase the amount of illegal cigarettes sold in the UK. Do you think this is likely or unlikely?



Q8. Based on what you know, to what extent do you agree or disagree with the following statements? **It is likely that criminals who sell illegal tobacco will benefit when tobacco branding is reduced or removed.**



Fieldwork supplier:
Kantar TNS

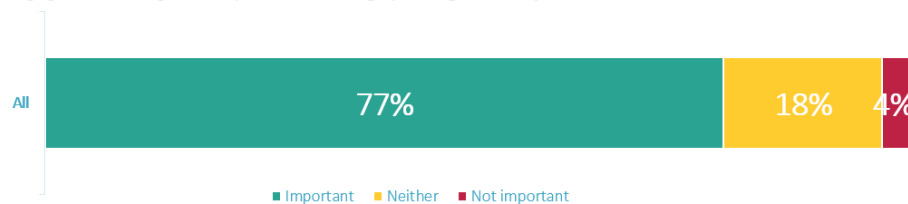
1. April 2018 - Base: All (2,464), Regular smokers (514)

7

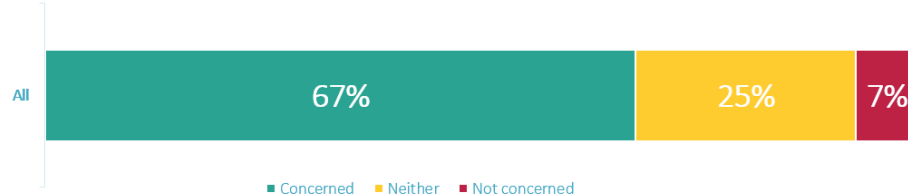
- 61% of UK adults agree (and 69% of smokers) that: 'It is likely that criminals who sell illegal tobacco will benefit when tobacco branding is reduced or removed.'
- 58% of UK adults (and 68% of smokers) think it is likely that plain packaging would make it easier to produce fake cigarette packaging and would increase the number of illegal cigarettes sold in the UK.

77 % of UK adults think it was important for the government to research the links between plain packaging and illegal tobacco, while 67% would be concerned if they learned that research had not been conducted.

Q10. How important or unimportant do you think it was for the Government to conduct thorough and evidence based-research on the impact of plain packaging in the following areas? **Impact on levels of illegal (including counterfeit) tobacco in the UK**



Q11. And how concerned or unconcerned would you be if you learned that the Government had not conducted thorough and evidence-based research on the impact of plain packaging in the following areas? **Impact on levels of illegal (including counterfeit) tobacco in the UK**



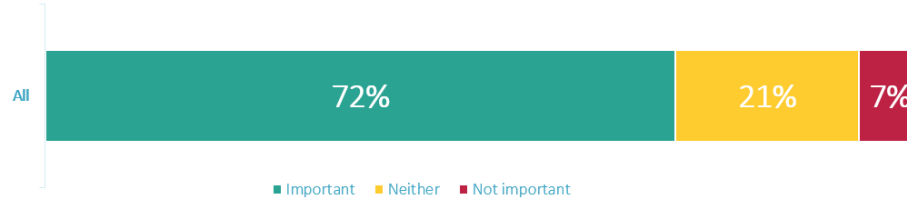
Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464)

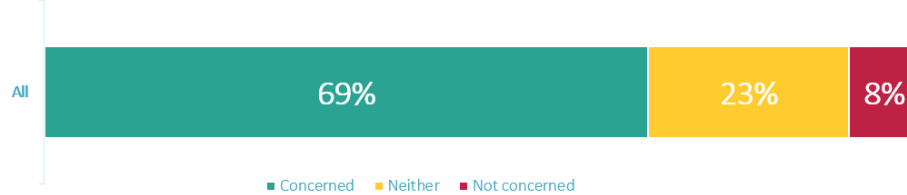
8

72% of UK adults think it was important for the government to research the links between plain packaging and terrorists. A similar number (69%) would be concerned if they learned that research had not been conducted.

Q10. How important or unimportant do you think it was for the Government to conduct thorough and evidence based-research on the impact of plain packaging in the following areas? **The link between illegal tobacco and terrorist organisations.**



Q11. And how concerned or unconcerned would you be if you learned that the Government had not conducted thorough and evidence-based research on the impact of plain packaging in the following areas? **The link between illegal tobacco and terrorist organisations.**



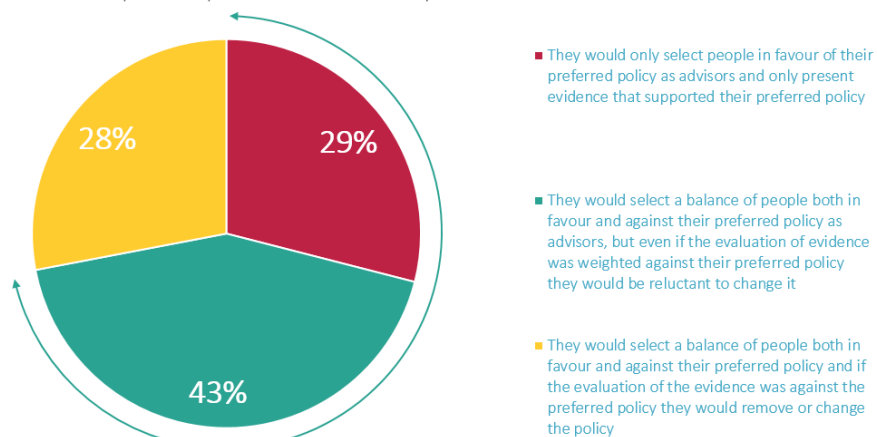
Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464)

9

72% believe the government would either: (a) fix a policy review or ignore evidence that went against a preferred policy (29%) or (b) be reluctant to change their preferred policy if there was evidence against it (43%).

Q2. Most laws in the UK are a result of proposals made by the government, which are then passed into law by Parliament. Proposals aim to shape society or address particular problems. If the UK government was looking to evaluate a policy area, which of these scenarios do you think is most likely in how they would conduct the evaluation process:



Fieldwork supplier:
Kantar TNS

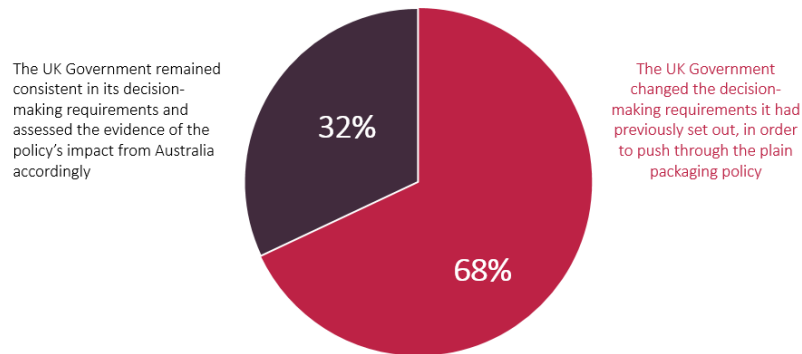
1. April 2018 - Base: All (2,464)

10

68% of UK adults think the government changed its decision-making requirements to push through the plain packaging policy.

Q15. In July 2013, UK Health Minister Jeremy Hunt said that any decision on plain packaging would be postponed: "We have decided to wait until the emerging impact of the decision in Australia can be measured, and then we will make a decision in England." When the Government decided to go ahead with plain packaging in 2017, it said that it was difficult to conclude how plain packaging had impacted smoking levels in Australia. However, they thought it was "a proportionate and justified response to the considerable public health harm from smoking tobacco."

Thinking about this, which of the following statements comes closest to your view?



Fieldwork supplier:
Kantar TNS

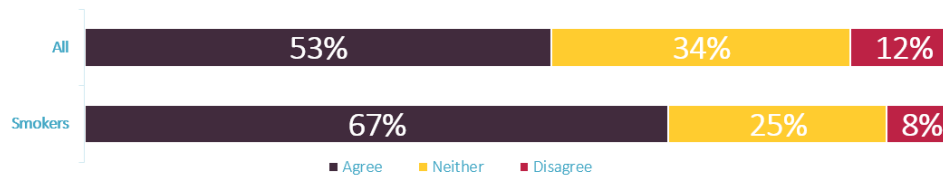
1. April 2018 - Base: All (2,464)

11

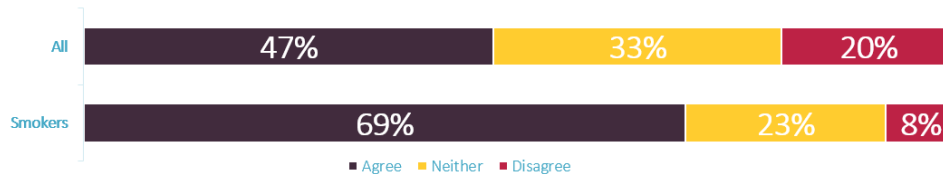
Four times as many UK adults agree (53%) vs. disagree (12%) that removing branding from tobacco sets a dangerous precedent for interference in other companies' trademarks, while 47% of adults agree vs. 20% disagree that tobacco companies should be allowed to brand as they choose within the space allowed.

Q8. Based on what you know, to what extent do you agree or disagree with the following statements?

If the UK government can remove logos and colours from tobacco packaging without evidence of the policy's effectiveness, it sets a dangerous precedent for over interference in other company brands and trademarks



Tobacco companies should be able to brand their products how they choose within the space allowed on the packs to make it easy for adult consumers to differentiate them from other brands.



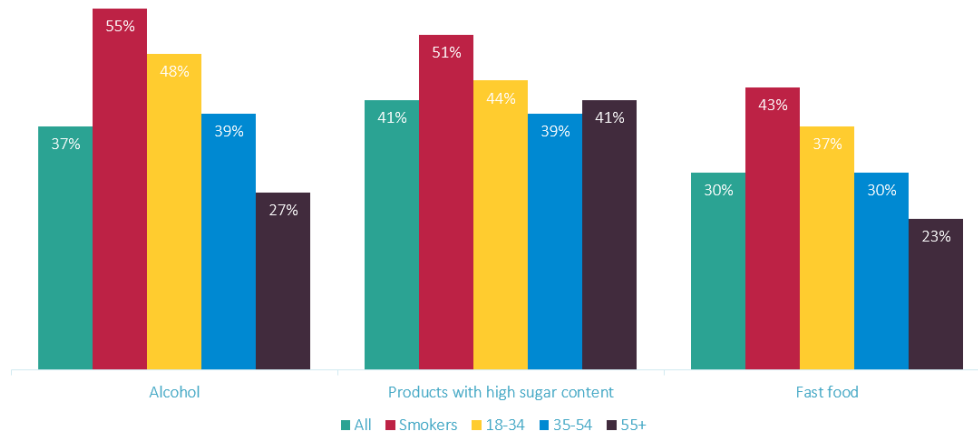
Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464), Regular smokers (514)

12

Smokers (55%) and adults under 35 (48%) are most likely to think the government will attempt to introduce plain packaging on alcohol in the future.

Q7. Now that the UK Government has introduced plain packaging on tobacco, how likely or unlikely do you think it is that it will attempt to introduce plain packaging into these additional product areas in the future? (%Showing Likely)



Fieldwork supplier:
Kantar TNS

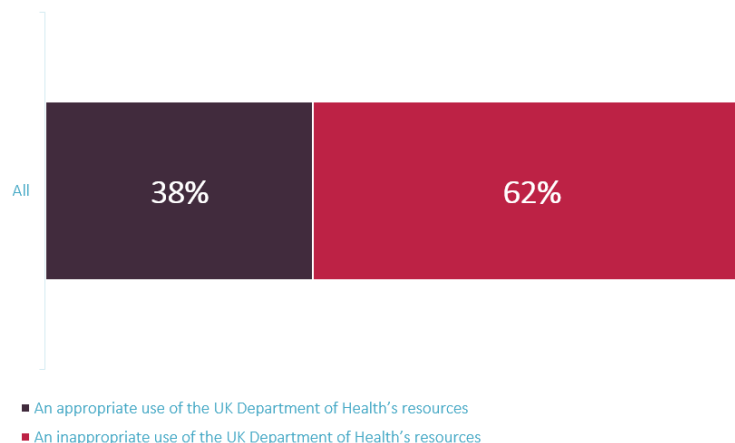
1. April 2018 - Base: All (2,464); Regular smokers (514); 18-34 (753); 35-54 (883); 55+ (828)

13

3/5 UK adults think that funding global tobacco control projects like plain packaging in developing countries is an inappropriate use of the UK Department of Health's resources.

Q16. The Department of Health in the UK also contributes funding to a global tobacco control project for developing countries. The aim of this project is to reduce smoking levels in developing countries through tobacco control measures, including the introduction of plain packaging.

Do you believe that funding tobacco control projects in developing countries is...



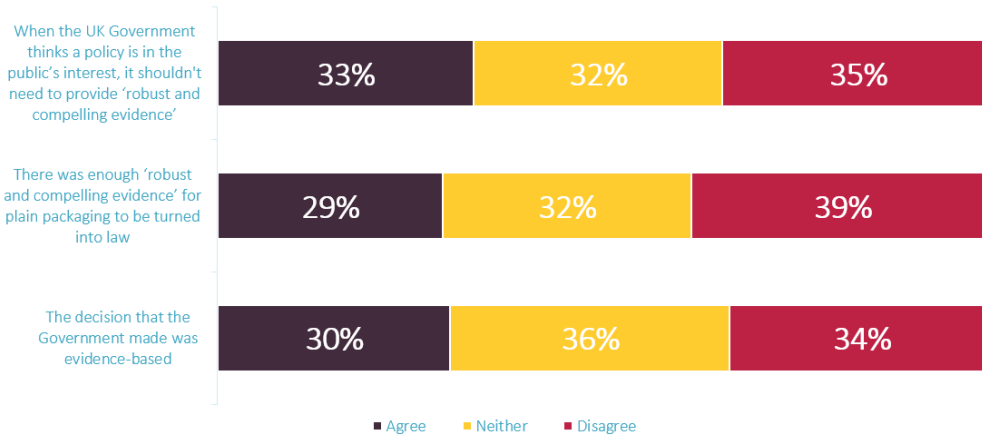
Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464)

14

More UK adults disagree vs. agree that (a) the UK Government doesn't need to provide robust and compelling evidence to introduce plain packaging, (b) that there was enough such evidence to turn plain packaging into law and (c) that the decision the UK Government took on plain packaging was evidence based.

Q14. Thinking about everything you know about the plain packaging policy making process, to what extent do you agree or disagree with the following statements:



Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464)

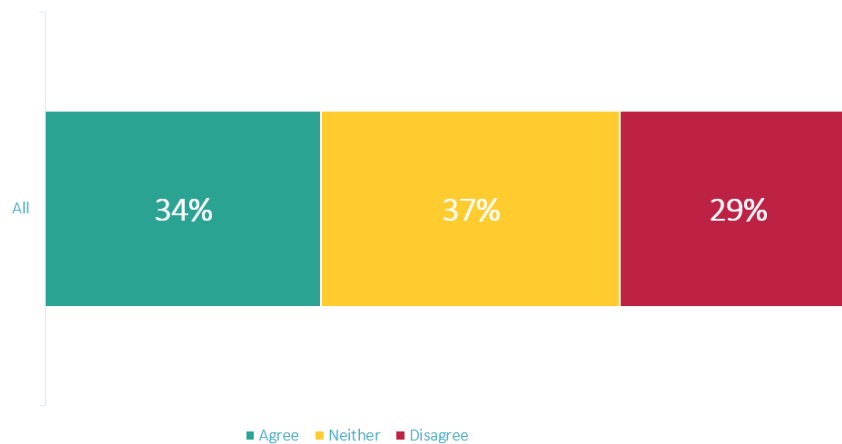
15

- More UK adults disagree (34%) vs. agree (30%) that the decision that the government made on plain packaging was evidence-based.
- More UK adults disagree (39%) vs. agree (29%) that there was enough robust and compelling evidence for plain packaging to be turned into law.
- More UK adults disagree (35%) vs. agree (33%) that when the UK Government thinks a policy is in the public's interest, it shouldn't need to provide robust and compelling evidence.

UK adults are unsure whether the UK government carried out a fair approach to plain packaging policy making.

Q14. Thinking about everything you know about the plain packaging policy making process, to what extent do you agree or disagree with the following statements:

The Government carried out a fair approach to plain packaging policy making



Fieldwork supplier:
Kantar TNS

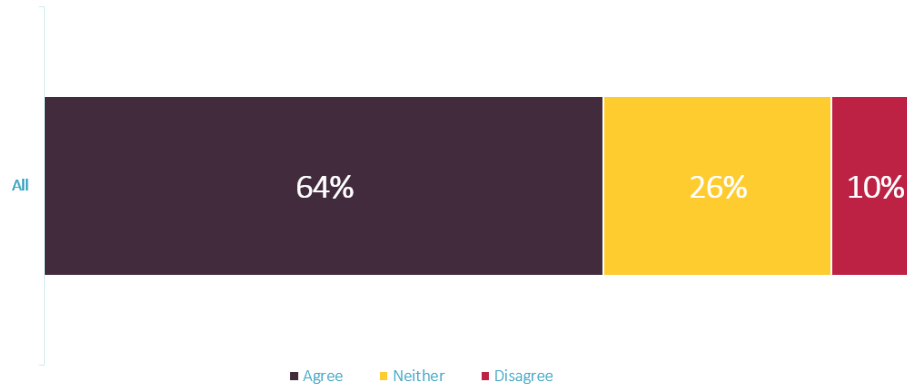
1. April 2018 - Base: All (2,464)

16

The desire to reduce smoking still means most adults think that any attempt is worth a try, regardless of evidence.

Q8. Based on what you know, to what extent do you agree or disagree with the following statements?

Any attempt to reduce smoking levels is worth a try, regardless of whether there is any evidence that a policy is effective



Fieldwork supplier:
Kantar TNS

1. April 2018 - Base: All (2,464)

17