

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI  
S1. First, how old are you?  
Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |          |            |                |           |           |          |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|----------|------------|----------------|-----------|-----------|----------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North    | North West | Yorks & Humber | East Mids | West Mids | Wales    | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39       | 20         | 35             | 36        | 35        | 28       | 23          | 41           | 13         | 47         | 59          |
| 18-24              | 13<br>3%    | 13<br>3%               | -              | 6<br>6%                | 5<br>4%   | 2<br>1%        | 11<br>3%  | 2<br>2%        | 10<br>3%   | 3<br>3%        | 12<br>4%  | 1<br>2%        | 7<br>3%   | 5<br>4%   | -         | 1<br>5%  | 1<br>3%    | 2<br>6%        | 1<br>3%   | 1<br>4%   | -        | 3<br>7%     | -            | 1<br>2%    | 2<br>3%    | 1<br>4%     |
| 25-29              | 46<br>12%   | 46<br>12%              | -              | 19<br>18%              | 7<br>6%   | 17<br>11%      | 41<br>13%   | 5<br>6%        | 38<br>13%  | 8<br>8%        | 43<br>13%   | 3<br>5%        | 27<br>11%   | 16<br>12% | 3<br>8%   | 1<br>5%  | 2<br>6%    | 4<br>11%       | 5<br>14%  | 3<br>11%  | 2<br>9%  | 4<br>10%    | -            | 3<br>6%    | 6<br>10%   | 13<br>54%   |
| 30-34              | 40<br>10%   | 40<br>10%              | -              | 14<br>13%              | 10<br>9%  | 14<br>9%       | 37<br>12%   | 3<br>4%        | 35<br>12%  | 4<br>4%        | 39<br>12%   | 1<br>2%        | 22<br>9%  | 14<br>11% | 4<br>10%  | 3<br>15% | 1<br>3%    | 3<br>8%        | 3<br>9%   | 3<br>11%  | -        | 6<br>15%    | 4<br>31%     | 6<br>13%   | 5<br>8%    | 2<br>8%     |
| 35-39              | 44<br>11%   | 44<br>11%              | -              | 14<br>13%              | 8<br>7%   | 18<br>11%      | 37<br>12%   | 6<br>7%        | 33<br>11%  | 8<br>8%        | 39<br>12%   | 3<br>5%        | 32<br>13%   | 10<br>8%  | 3<br>8%   | 4<br>20% | 3<br>9%    | 3<br>8%        | 5<br>14%  | 2<br>7%   | 2<br>9%  | 9<br>22%    | 1<br>8%      | 7<br>15%   | 3<br>5%    | 2<br>8%     |
| 40-44              | 73<br>18%   | 73<br>18%              | -              | 16<br>15%              | 21<br>19% | 30<br>19%      | 60<br>19%   | 13<br>16%      | 59<br>20%  | 13<br>13%      | 65<br>20%   | 7<br>11%       | 45<br>18%   | 20<br>15% | 8<br>21%  | 1<br>5%  | 12<br>34%  | 8<br>22%       | 4<br>11%  | 7<br>25%  | 3<br>13% | 7<br>17%    | 3<br>23%     | 6<br>13%   | 11<br>19%  | 3<br>13%    |
| 45-49              | 62<br>16%   | 62<br>16%              | -              | 13<br>12%              | 19<br>17% | 28<br>18%      | 49<br>16%   | 13<br>16%      | 46<br>16%  | 15<br>15%      | 51<br>15%   | 11<br>18%      | 40<br>16%   | 21<br>16% | 4<br>10%  | 5<br>25% | 8<br>23%   | 8<br>22%       | 3<br>9%   | 4<br>14%  | 5<br>22% | 1<br>2%     | 3<br>23%     | 5<br>11%   | 14<br>24%  | 2<br>8%     |
| 50-54              | 38<br>10%   | 38<br>10%              | -              | 14<br>13%              | 13<br>12% | 11<br>7%       | 24<br>8%  | 14<br>17%      | 18<br>6%   | 18<br>18%      | 26<br>8%  | 11<br>18%      | 22<br>9%  | 15<br>11% | 4<br>10%  | -        | 5<br>14%   | 4<br>11%       | 4<br>11%  | 3<br>11%  | 2<br>9%  | 4<br>10%    | 1<br>8%      | 4<br>9%    | 7<br>12%   | -           |
| 55-59              | 38<br>10%   | 38<br>10%              | -              | 6<br>6%                | 16<br>14% | 16<br>10%      | 26<br>8%  | 11<br>13%      | 23<br>8%   | 14<br>14%      | 27<br>8%  | 10<br>16%      | 24<br>10%   | 12<br>9%  | 6<br>15%  | 3<br>15% | 1<br>3%    | 1<br>3%        | 5<br>14%  | 2<br>7%   | 5<br>22% | 3<br>7%     | 1<br>8%      | 5<br>11%   | 6<br>10%   | -           |
| 60-64              | 21<br>5%    | 21<br>5%               | -              | 4<br>4%                | 7<br>6%   | 7<br>4%        | 16<br>5%  | 5<br>6%        | 16<br>6%   | 5<br>5%        | 17<br>5%  | 4<br>6%        | 15<br>6%  | 6<br>5%   | 2<br>5%   | 1<br>5%  | 2<br>6%    | 2<br>6%        | 3<br>9%   | 1<br>4%   | 1<br>4%  | 1<br>2%     | -            | 4<br>9%    | 3<br>5%    | 1<br>4%     |
| 65-69              | 16<br>4%    | 16<br>4%               | -              | 1<br>1%                | 4<br>4%   | 11<br>7%       | 11<br>3%  | 5<br>6%        | 10<br>3%   | 6<br>6%        | 11<br>3%  | 5<br>8%        | 10<br>4%  | 5<br>4%   | 3<br>8%   | 1<br>5%  | -          | 1<br>3%        | 2<br>6%   | 1<br>4%   | 1<br>4%  | 2<br>5%     | -            | 4<br>9%    | 1<br>2%    | -           |
| 70 or older        | 9<br>2%     | 9<br>2%                | -              | 1<br>1%                | 2<br>2%   | 6<br>4%        | 3<br>1%   | 6<br>7%        | 2<br>1%  | 7<br>7%        | 3<br>1%   | 6<br>10%       | 2<br>1%   | 7<br>5%   | 2<br>5%   | -        | -          | -              | -         | 1<br>4%   | 2<br>9%  | 1<br>2%     | -            | 2<br>4%    | 1<br>2%    | -           |
| Mean               | 43.99       | 43.99                  | -              | 40.26                  | 45.76     | 45.60          | 42.53   | 49.42          | 42.33  | 48.76          | 42.46   | 52.11          | 43.89   | 44.87     | 47.92     | 43.45    | 43.97      | 42.36          | 44.54     | 43.86     | 50.30    | 41.15       | 41.62        | 46.79      | 44.56      | 33.00       |
| Standard deviation | 12.44       | 12.44                  | -              | 11.73                  | 12.10     | 12.81          | 11.92   | 12.95          | 11.79  | 13.34          | 11.86   | 12.70          | 11.83   | 13.66     | 13.06     | 12.25    | 8.84       | 11.22          | 13.08     | 12.67     | 12.73    | 13.09       | 8.28         | 13.79      | 11.55      | 9.61        |
| Standard error     | 0.62        | 0.62                   | -              | 1.13                   | 1.14      | 1.01           | 0.67  | 1.42           | 0.69   | 1.33           | 0.65  | 1.61           | 0.75  | 1.19      | 2.09      | 2.74     | 1.49       | 1.87           | 2.21      | 2.39      | 2.66     | 2.04        | 2.30         | 2.01       | 1.50       | 1.96        |

**UK Retailers Survey**  
**CATI Fieldwork : 4th September - 5th November 2012**

Absolutes/col percents

Sample: RMI  
 S2. Gender  
 Base: All respondents

|        | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|--------|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|        | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|        | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Male   | 221         | 221                    | -              | 59                     | 63    | 86             | 163   | 57             | 157  | 60             | 175   | 45             | 142   | 66  | 26        | 8     | 16         | 19             | 13        | 14        | 12    | 25          | 9            | 31         | 36         | 12          |
|        | 55%         | 55%                    | -              | 55%                    | 56%   | 54%            | 52%   | 69%            | 54%  | 59%            | 53%   | 73%            | 58%   | 50% | 67%       | 40%   | 46%        | 53%            | 37%       | 50%       | 52%   | 61%         | 69%          | 66%        | 61%        | 50%         |
| Female | 179         | 179                    | -              | 49                     | 49    | 74             | 152   | 26             | 133  | 41             | 158   | 17             | 104   | 65  | 13        | 12    | 19         | 17             | 22        | 14        | 11    | 16          | 4            | 16         | 23         | 12          |
|        | 45%         | 45%                    | -              | 45%                    | 44%   | 46%            | 48%   | 31%            | 46%  | 41%            | 47%   | 27%            | 42%   | 50% | 33%       | 60%   | 54%        | 47%            | 63%       | 50%       | 48%   | 39%         | 31%          | 34%        | 39%        | 50%         |

**UK Retailers Survey**  
**CATI Fieldwork : 4th September - 5th November 2012**

Absolutes/col percents

Sample: RMI

S3. Are you - or is any member of your immediate family - currently employed with/as:

Base: All respondents

|   | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |      | Region    |       |            |                |           |           |       |             |              |            |            |             |
|---|-------------|------------------------|----------------|------------------------|-------|----------------|---|-----------------|--|-----------------|---|-----------------|---|------|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|   | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No   | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|   | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315             | 83   | 290             | 101   | 333             | 62  | 246  | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| A nationally elected official                         | -           | -                      | -              | -                      | -     | -              | -   | -               | -  | -               | -   | -               | -   | -    | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| A senior role or policy making role in the government | -           | -                      | -              | -                      | -     | -              | -   | -               | -  | -               | -   | -               | -   | -    | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| Neither of these                                      | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83              | 290  | 101             | 333   | 62              | 246   | 131  | 39        | 20    | 35         | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |
|   | 100%        | 100%                   | -              | 100%                   | 100%  | 100%           | 100%  | 100%            | 100%   | 100%            | 100%  | 100%            | 100%  | 100% | 100%      | 100%  | 100%       | 100%           | 100%      | 100%      | 100%  | 100%        | 100%         | 100%       | 100%       | 100%        |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q1. From the perspective of a business person, do you feel like the economy in the UK is better or worse than it was a year ago?

Base: All respondents

|                      | Sample Type       |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|----------------------|-------------------|------------------------|----------------|------------------------|-----------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                      | Total             | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                      | Base              | 400                    | 400            | -                      | 108       | 112            | 160   | 315             | 83   | 290             | 101   | 333             | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| NET: Better          | 72<br>18%         | 72<br>18%              | -              | 41<br>38%              | 6<br>5%   | 19<br>12%      | 57<br>18%   | 15<br>18%       | 53<br>18%  | 19<br>19%       | 61<br>18%   | 11<br>18%       | 42<br>17%   | 23<br>18% | 5<br>13%  | 5<br>25%  | 7<br>20%   | 7<br>19%       | 8<br>23%  | 8<br>29%  | 1<br>4%   | 8<br>20%    | 3<br>23%     | 5<br>11%   | 9<br>15%   | 6<br>25%    |
| Significantly better | (5)<br>9<br>2%    | 9<br>2%                | -              | 4<br>4%                | 1<br>1%   | 3<br>2%        | 8<br>3%   | 1<br>1%         | 9<br>3%  | -               | 9<br>3%   | -               | 7<br>3%   | 2<br>2%   | 3<br>8%   | -         | 1<br>3%    | -              | -         | -         | -         | -           | -            | 2<br>4%    | 3<br>5%    | -           |
| Somewhat better      | (4)<br>63<br>16%  | 63<br>16%              | -              | 37<br>34%              | 5<br>4%   | 16<br>10%      | 49<br>16%   | 14<br>17%       | 44<br>15%  | 19<br>19%       | 52<br>16%   | 11<br>18%       | 35<br>14%   | 21<br>16% | 2<br>5%   | 5<br>25%  | 6<br>17%   | 7<br>19%       | 8<br>23%  | 8<br>29%  | 1<br>4%   | 8<br>20%    | 3<br>23%     | 3<br>6%    | 6<br>10%   | 6<br>25%    |
| About the same       | (3)<br>93<br>23%  | 93<br>23%              | -              | 29<br>27%              | 18<br>16% | 43<br>27%      | 69<br>22%   | 24<br>29%       | 66<br>23%  | 26<br>26%       | 72<br>22%   | 20<br>32%       | 54<br>22%   | 33<br>25% | 8<br>21%  | 3<br>15%  | 8<br>23%   | 8<br>22%       | 10<br>29% | 7<br>25%  | 3<br>13%  | 9<br>22%    | 3<br>23%     | 14<br>30%  | 14<br>24%  | 6<br>25%    |
| Somewhat worse       | (2)<br>124<br>31% | 124<br>31%             | -              | 21<br>19%              | 41<br>37% | 57<br>36%      | 99<br>31%   | 24<br>29%       | 95<br>33%  | 27<br>27%       | 106<br>32%  | 16<br>26%       | 83<br>34%   | 36<br>27% | 15<br>38% | 5<br>25%  | 13<br>37%  | 12<br>33%      | 10<br>29% | 7<br>25%  | 13<br>57% | 11<br>27%   | 3<br>23%     | 14<br>30%  | 15<br>25%  | 6<br>25%    |
| Significantly worse  | (1)<br>101<br>25% | 101<br>25%             | -              | 13<br>12%              | 45<br>40% | 37<br>23%      | 81<br>26%   | 19<br>23%       | 68<br>23%  | 27<br>27%       | 85<br>26%   | 14<br>23%       | 64<br>26%   | 33<br>25% | 10<br>26% | 7<br>35%  | 7<br>20%   | 8<br>22%       | 7<br>20%  | 6<br>21%  | 6<br>26%  | 10<br>24%   | 4<br>31%     | 12<br>26%  | 20<br>34%  | 4<br>17%    |
| NET: Worse           | 225<br>56%        | 225<br>56%             | -              | 34<br>31%              | 86<br>77% | 94<br>59%      | 180<br>57%  | 43<br>52%       | 163<br>56%   | 54<br>53%       | 191<br>57%  | 30<br>48%       | 147<br>60%  | 69<br>53% | 25<br>64% | 12<br>60% | 20<br>57%  | 20<br>56%      | 17<br>49% | 13<br>46% | 19<br>83% | 21<br>51%   | 7<br>54%     | 26<br>55%  | 35<br>59%  | 10<br>42%   |
| Don't know/refused   | 10<br>3%          | 10<br>3%               | -              | 4<br>4%                | 2<br>2%   | 4<br>3%        | 9<br>3%   | 1<br>1%         | 8<br>3%  | 2<br>2%         | 9<br>3%   | 1<br>2%         | 3<br>1%   | 6<br>5%   | 1<br>3%   | -         | -          | 1<br>3%        | -         | -         | -         | 3<br>7%     | -            | 2<br>4%    | 1<br>2%    | 2<br>8%     |
| Mean                 | 2.37              | 2.37                   | -              | 2.98                   | 1.87      | 2.30           | 2.36  | 2.44            | 2.40   | 2.37            | 2.36  | 2.46            | 2.33  | 2.38      | 2.29      | 2.30      | 2.46       | 2.40           | 2.54      | 2.61      | 1.96      | 2.39        | 2.38         | 2.31       | 2.26       | 2.64        |
| Standard deviation   | 1.10              | 1.10                   | -              | 1.11                   | 0.91      | 1.01           | 1.11  | 1.07            | 1.11   | 1.08            | 1.12  | 1.04            | 1.10  | 1.10      | 1.16      | 1.22      | 1.09       | 1.06           | 1.07      | 1.13      | 0.77      | 1.10        | 1.19         | 1.08       | 1.19       | 1.09        |
| Standard error       | 0.06              | 0.06                   | -              | 0.11                   | 0.09      | 0.08           | 0.06  | 0.12            | 0.07   | 0.11            | 0.06  | 0.13            | 0.07  | 0.10      | 0.19      | 0.27      | 0.18       | 0.18           | 0.18      | 0.21      | 0.16      | 0.18        | 0.33         | 0.16       | 0.16       | 0.23        |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q2. How would you compare your sales revenue today versus a year ago? Overall, is your revenue from sales higher, lower, or about the same?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Higher             | 64          | 64                     | -              | 45                     | 2     | 17             | 48  | 15             | 48   | 15             | 53  | 10             | 37  | 20  | 4         | 3     | 3          | 9              | 3         | 3         | 1     | 7           | -            | 10         | 11         | 10          |
|                    | 16%         | 16%                    | -              | 42%                    | 2%    | 11%            | 15%   | 18%            | 17%  | 15%            | 16%   | 16%            | 15%   | 15% | 10%       | 15%   | 9%         | 25%            | 9%        | 11%       | 4%    | 17%         | -            | 21%        | 19%        | 42%         |
| Lower              | 160         | 160                    | -              | 17                     | 83    | 57             | 123   | 36             | 113  | 42             | 131   | 27             | 107   | 45  | 16        | 6     | 14         | 10             | 15        | 13        | 13    | 15          | 8            | 19         | 24         | 7           |
|                    | 40%         | 40%                    | -              | 16%                    | 74%   | 36%            | 39%   | 43%            | 39%  | 42%            | 39%   | 44%            | 43%   | 34% | 41%       | 30%   | 40%        | 28%            | 43%       | 46%       | 57%   | 37%         | 62%          | 40%        | 41%        | 29%         |
| About the same     | 153         | 153                    | -              | 41                     | 26    | 83             | 122   | 31             | 111  | 40             | 127   | 25             | 94  | 53  | 17        | 9     | 17         | 17             | 16        | 10        | 8     | 15          | 4            | 13         | 20         | 7           |
|                    | 38%         | 38%                    | -              | 38%                    | 23%   | 52%            | 39%   | 37%            | 38%  | 40%            | 38%   | 40%            | 38%   | 40% | 44%       | 45%   | 49%        | 47%            | 46%       | 36%       | 35%   | 37%         | 31%          | 28%        | 34%        | 29%         |
| Don't know/refused | 23          | 23                     | -              | 5                      | 1     | 3              | 22  | 1              | 18   | 4              | 22  | -              | 8   | 13  | 2         | 2     | 1          | -              | 1         | 2         | 1     | 4           | 1            | 5          | 4          | -           |
|                    | 6%          | 6%                     | -              | 5%                     | 1%    | 2%             | 7%  | 1%             | 6%   | 4%             | 7%  | -              | 3%  | 10% | 5%        | 10%   | 3%         | -              | 3%        | 7%        | 4%    | 10%         | 8%           | 11%        | 7%         | -           |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q3. And thinking about the year ahead. Do you expect your overall sales revenue in 2012 to be higher, lower or about the same as they were in 2011?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Higher             | 108         | 108                    | -              | 108                    | -     | -              | 89  | 19             | 80   | 26             | 94  | 12             | 66  | 34  | 5         | 8     | 11         | 14             | 9         | 9         | 4     | 9           | 3            | 10         | 13         | 13          |
|                    | 27%         | 27%                    | -              | 100%                   | -     | -              | 28%   | 23%            | 28%  | 26%            | 28%   | 19%            | 27%   | 26% | 13%       | 40%   | 31%        | 39%            | 26%       | 32%       | 17%   | 22%         | 23%          | 21%        | 22%        | 54%         |
| Lower              | 112         | 112                    | -              | -                      | 112   | -              | 91  | 21             | 82   | 27             | 93  | 19             | 75  | 29  | 15        | 5     | 7          | 13             | 10        | 8         | 6     | 11          | 4            | 11         | 18         | 4           |
|                    | 28%         | 28%                    | -              | -                      | 100%  | -              | 29%   | 25%            | 28%  | 27%            | 28%   | 31%            | 30%   | 22% | 38%       | 25%   | 20%        | 36%            | 29%       | 26%       | 27%   | 31%         | 23%          | 31%        | 17%        |             |
| About the same     | 160         | 160                    | -              | -                      | -     | 160            | 118   | 40             | 113  | 43             | 129   | 28             | 97  | 59  | 16        | 7     | 16         | 8              | 15        | 10        | 12    | 19          | 5            | 21         | 24         | 7           |
|                    | 40%         | 40%                    | -              | -                      | -     | 100%           | 37%   | 48%            | 39%  | 43%            | 39%   | 45%            | 39%   | 45% | 41%       | 35%   | 46%        | 22%            | 43%       | 36%       | 52%   | 46%         | 38%          | 45%        | 41%        | 29%         |
| Don't know/refused | 20          | 20                     | -              | -                      | -     | -              | 17  | 3              | 15   | 5              | 17  | 3              | 8   | 9   | 3         | -     | 1          | 1              | 1         | 1         | 1     | 2           | 1            | 5          | 4          | -           |
|                    | 5%          | 5%                     | -              | -                      | -     | -              | 5%  | 4%             | 5%   | 5%             | 5%  | 5%             | 3%  | 7%  | 8%        | -     | 3%         | 3%             | 3%        | 4%        | 4%    | 5%          | 8%           | 11%        | 7%         | -           |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q4. How important are direct tobacco sales to your establishment's bottom line?

Base: All respondents

|                      | Sample Type    |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|----------------------|----------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                      | Total          | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                      | Base           | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| NET: Important       | 315<br>79%     | 315<br>79%             | -              | 89<br>82%              | 91<br>81% | 118<br>74%     | 315<br>100%   | -              | 272<br>94%   | 39<br>39%      | 315<br>95%  | -              | 215<br>87%  | 78<br>60% | 24<br>62% | 17<br>85% | 32<br>91%  | 32<br>89%      | 30<br>86% | 24<br>86% | 15<br>65% | 33<br>80%   | 12<br>92%    | 35<br>74%  | 42<br>71%  | 19<br>79%   |
| Very important       | (4) 199<br>50% | 199<br>50%             | -              | 59<br>55%              | 52<br>46% | 79<br>49%      | 199<br>63%  | -              | 182<br>63%   | 14<br>14%      | 199<br>60%  | -              | 138<br>56%  | 46<br>35% | 13<br>33% | 13<br>65% | 23<br>66%  | 22<br>61%      | 17<br>49% | 15<br>54% | 10<br>43% | 17<br>41%   | 8<br>62%     | 26<br>55%  | 23<br>39%  | 12<br>50%   |
| Somewhat important   | (3) 116<br>29% | 116<br>29%             | -              | 30<br>28%              | 39<br>35% | 39<br>24%      | 116<br>37%  | -              | 90<br>31%  | 25<br>25%      | 116<br>35%  | -              | 77<br>31%   | 32<br>24% | 11<br>28% | 4<br>20%  | 9<br>26%   | 10<br>28%      | 13<br>37% | 9<br>32%  | 5<br>22%  | 5<br>39%    | 16<br>31%    | 4<br>19%   | 9<br>32%   | 7<br>29%    |
| Not very important   | (2) 39<br>10%  | 39<br>10%              | -              | 12<br>11%              | 7<br>6%   | 20<br>13%      | -   | 39<br>47%      | 15<br>5%   | 22<br>22%      | 15<br>5%  | 22<br>35%      | 21<br>9%  | 17<br>13% | 2<br>5%   | 2<br>10%  | 3<br>9%    | 1<br>3%        | 5<br>14%  | 1<br>4%   | 4<br>17%  | 5<br>12%    | -            | 4<br>9%    | 7<br>12%   | 5<br>21%    |
| Not important at all | (1) 44<br>11%  | 44<br>11%              | -              | 7<br>6%                | 14<br>13% | 20<br>13%      | -   | 44<br>53%      | 3<br>1%  | 40<br>40%      | 3<br>1%   | 40<br>65%      | 9<br>4%   | 35<br>27% | 12<br>31% | 1<br>5%   | -          | 2<br>6%        | -         | 3<br>11%  | 4<br>17%  | 3<br>7%     | 1<br>8%      | 8<br>17%   | 10<br>17%  | -           |
| NET: Not important   | 83<br>21%      | 83<br>21%              | -              | 19<br>18%              | 21<br>19% | 40<br>25%      | -   | 83<br>100%     | 18<br>6%   | 62<br>61%      | 18<br>5%  | 62<br>100%     | 30<br>12%   | 52<br>40% | 14<br>36% | 3<br>15%  | 3<br>9%    | 3<br>8%        | 5<br>14%  | 4<br>14%  | 8<br>35%  | 8<br>20%    | 1<br>8%      | 12<br>26%  | 17<br>29%  | 5<br>21%    |
| Don't know/refused   | 2<br>1%        | 2<br>1%                | -              | -                      | -         | 2<br>1%        | -   | -              | -  | -              | -   | -              | 1<br>*  | 1<br>1%   | 1<br>3%   | -         | -          | 1<br>3%        | -         | -         | -         | -           | -            | -          | -          | -           |
| Mean                 | 3.18           | 3.18                   | -              | 3.31                   | 3.15      | 3.12           | 3.63  | 1.47           | 3.56   | 2.13           | 3.53  | 1.35           | 3.40  | 2.68      | 2.66      | 3.45      | 3.57       | 3.49           | 3.34      | 3.29      | 2.91      | 3.15        | 3.46         | 3.13       | 2.93       | 3.29        |
| Standard deviation   | 1.00           | 1.00                   | -              | 0.91                   | 1.01      | 1.06           | 0.48  | 0.50           | 0.64   | 1.09           | 0.63  | 0.48           | 0.80  | 1.21      | 1.26      | 0.89      | 0.65       | 0.82           | 0.73      | 0.98      | 1.16      | 0.91        | 0.88         | 1.15       | 1.10       | 0.81        |
| Standard error       | 0.05           | 0.05                   | -              | 0.09                   | 0.10      | 0.08           | 0.03  | 0.06           | 0.04   | 0.11           | 0.03  | 0.06           | 0.05  | 0.11      | 0.20      | 0.20      | 0.11       | 0.14           | 0.12      | 0.18      | 0.24      | 0.14        | 0.24         | 0.17       | 0.14       | 0.16        |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q5. How important is indirect revenue from tobacco, such as increased foot traffic and larger shopping baskets to your establishment's bottom line?

Base: All respondents

|                      | Sample Type       |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|----------------------|-------------------|------------------------|----------------|------------------------|-----------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                      | Total             | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                      |                   |                        |                |                        |           |                |   |                 |  |                 |   |                 |   |           |           |           |            |                |           |           |           |             |              |            |            |             |
| Base                 | 400               | 400                    | -              | 108                    | 112       | 160            | 315   | 83              | 290  | 101             | 333   | 62              | 246   | 131       | 39        | 20        | 35         | 36             | 35        | 28        | 23        | 41          | 13           | 47         | 59         | 24          |
| NET: Important       | 290<br>73%        | 290<br>73%             | -              | 80<br>74%              | 82<br>73% | 113<br>71%     | 272<br>86%  | 18<br>22%       | 290<br>100%  | -               | 290<br>87%  | -               | 200<br>81%  | 69<br>53% | 24<br>62% | 15<br>75% | 29<br>83%  | 31<br>86%      | 29<br>83% | 20<br>71% | 14<br>61% | 28<br>68%   | 10<br>77%    | 35<br>74%  | 33<br>56%  | 22<br>92%   |
| Very important       | (4)<br>164<br>41% | 164<br>41%             | -              | 45<br>42%              | 47<br>42% | 62<br>39%      | 159<br>50%  | 5<br>6%         | 164<br>57%   | -               | 164<br>49%  | -               | 120<br>49%  | 32<br>24% | 14<br>36% | 9<br>45%  | 24<br>69%  | 14<br>39%      | 17<br>49% | 12<br>43% | 5<br>22%  | 16<br>39%   | 7<br>54%     | 18<br>38%  | 19<br>32%  | 9<br>38%    |
| Somewhat important   | (3)<br>126<br>32% | 126<br>32%             | -              | 35<br>32%              | 35<br>31% | 51<br>32%      | 113<br>36%  | 13<br>16%       | 126<br>43%   | -               | 126<br>38%  | -               | 80<br>33%   | 37<br>28% | 10<br>26% | 6<br>30%  | 5<br>14%   | 17<br>47%      | 12<br>34% | 8<br>29%  | 9<br>39%  | 12<br>29%   | 3<br>23%     | 17<br>36%  | 14<br>24%  | 13<br>54%   |
| Not very important   | (2)<br>53<br>13%  | 53<br>13%              | -              | 16<br>15%              | 10<br>9%  | 25<br>16%      | 31<br>10%   | 22<br>27%       | -  | 53<br>52%       | 31<br>9%  | 22<br>35%       | 30<br>12%   | 21<br>16% | -         | 3<br>15%  | 5<br>14%   | -              | 6<br>17%  | 3<br>11%  | 5<br>22%  | 10<br>24%   | 2<br>15%     | 5<br>11%   | 13<br>22%  | 1<br>4%     |
| Not important at all | (1)<br>48<br>12%  | 48<br>12%              | -              | 10<br>9%               | 17<br>15% | 18<br>11%      | 8<br>3%   | 40<br>48%       | -  | 48<br>48%       | 8<br>2%   | 40<br>65%       | 11<br>4%  | 37<br>28% | 13<br>33% | 2<br>10%  | 1<br>3%    | 3<br>8%        | -         | 3<br>11%  | 4<br>17%  | 3<br>7%     | 1<br>8%      | 7<br>15%   | 11<br>19%  | -           |
| NET: Not important   | 101<br>25%        | 101<br>25%             | -              | 26<br>24%              | 27<br>24% | 43<br>27%      | 39<br>12%   | 62<br>75%       | -  | 101<br>100%     | 39<br>12%   | 62<br>100%      | 41<br>17%   | 58<br>44% | 13<br>33% | 5<br>25%  | 6<br>17%   | 3<br>8%        | 6<br>17%  | 6<br>21%  | 9<br>39%  | 13<br>32%   | 3<br>23%     | 12<br>26%  | 24<br>41%  | 1<br>4%     |
| Don't know/refused   | 9<br>2%           | 9<br>2%                | -              | 2<br>2%                | 3<br>3%   | 4<br>3%        | 4<br>1%   | 3<br>4%         | -  | -               | 4<br>1%   | -               | 5<br>2%   | 4<br>3%   | 2<br>5%   | -         | -          | 2<br>6%        | -         | 2<br>7%   | -         | -           | -            | -          | 2<br>3%    | 1<br>4%     |
| Mean                 | 3.04              | 3.04                   | -              | 3.08                   | 3.03      | 3.01           | 3.36  | 1.79            | 3.57   | 1.52            | 3.36  | 1.35            | 3.28  | 2.50      | 2.68      | 3.10      | 3.49       | 3.24           | 3.31      | 3.12      | 2.65      | 3.00        | 3.23         | 2.98       | 2.72       | 3.35        |
| Standard deviation   | 1.02              | 1.02                   | -              | 0.98                   | 1.08      | 1.01           | 0.77  | 0.94            | 0.50   | 0.50            | 0.75  | 0.48            | 0.85  | 1.16      | 1.31      | 1.02      | 0.85       | 0.85           | 0.76      | 1.03      | 1.03      | 0.97        | 1.01         | 1.05       | 1.13       | 0.57        |
| Standard error       | 0.05              | 0.05                   | -              | 0.09                   | 0.10      | 0.08           | 0.04  | 0.10            | 0.03   | 0.05            | 0.04  | 0.06            | 0.05  | 0.10      | 0.22      | 0.23      | 0.14       | 0.15           | 0.13      | 0.20      | 0.21      | 0.15        | 0.28         | 0.15       | 0.15       | 0.12        |



## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

**Q6. Are you aware of illicit tobacco products being sold in your local area? That is to say tobacco and cigarettes that are either smuggled into the UK, counterfeit cigarettes, or cheap cigarettes produced in other countries for the sole purpose of illegal sale in the UK.**

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| Yes                | 135<br>34%  | 135<br>34%             | -              | 30<br>28%              | 50<br>45% | 48<br>30%      | 106<br>34%  | 28<br>34%      | 95<br>33%  | 37<br>37%      | 114<br>34%  | 19<br>31%      | 105<br>43%  | 28<br>21% | 16<br>41% | 7<br>35%  | 14<br>40%  | 15<br>42%      | 12<br>34% | 6<br>21%  | 6<br>26%  | 11<br>27%   | 4<br>31%     | 17<br>36%  | 20<br>34%  | 7<br>29%    |
| No                 | 247<br>62%  | 247<br>62%             | -              | 76<br>70%              | 55<br>49% | 104<br>65%     | 198<br>63%  | 48<br>58%      | 185<br>64%   | 56<br>55%      | 207<br>62%  | 37<br>60%      | 135<br>55%  | 93<br>71% | 22<br>56% | 12<br>60% | 21<br>60%  | 18<br>50%      | 23<br>66% | 22<br>79% | 14<br>61% | 28<br>68%   | 8<br>62%     | 27<br>57%  | 35<br>59%  | 17<br>71%   |
| Don't know/refused | 18<br>5%    | 18<br>5%               | -              | 2<br>2%                | 7<br>6%   | 8<br>5%        | 11<br>3%  | 7<br>8%        | 10<br>3%   | 8<br>8%        | 12<br>4%  | 6<br>10%       | 6<br>2%   | 10<br>8%  | 1<br>3%   | 1<br>5%   | -          | 3<br>8%        | -         | -         | 3<br>13%  | 2<br>5%     | 1<br>8%      | 3<br>6%    | 4<br>7%    | -           |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q7. How easy do you think it is for people to buy illicit tobacco products in your local area?

Base: All respondents

|                    | Sample Type       |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|--------------------|-------------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                    | Total             | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base              | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| NET: Easy          | 188<br>47%        | 188<br>47%             | -              | 47<br>44%              | 60<br>54% | 74<br>46%      | 153<br>49%  | 34<br>41%      | 141<br>49%   | 43<br>43%      | 162<br>49%  | 23<br>37%      | 139<br>57%  | 45<br>34% | 16<br>41% | 12<br>60% | 20<br>57%  | 25<br>69%      | 16<br>46% | 12<br>43% | 11<br>48% | 18<br>44%   | 5<br>38%     | 17<br>36%  | 24<br>41%  | 12<br>50%   |
| Very easy          | (4)<br>73<br>18%  | 73<br>18%              | -              | 19<br>18%              | 26<br>23% | 23<br>14%      | 61<br>19%   | 12<br>14%      | 58<br>20%  | 14<br>14%      | 65<br>20%   | 7<br>11%       | 54<br>22%   | 19<br>15% | 7<br>18%  | 5<br>25%  | 10<br>29%  | 11<br>31%      | 7<br>20%  | 5<br>18%  | 1<br>4%   | 4<br>10%    | 1<br>8%      | 9<br>19%   | 9<br>15%   | 4<br>17%    |
| Quite easy         | (3)<br>115<br>29% | 115<br>29%             | -              | 28<br>26%              | 34<br>30% | 51<br>32%      | 92<br>29%   | 22<br>27%      | 83<br>29%  | 29<br>29%      | 97<br>29%   | 16<br>26%      | 85<br>35%   | 26<br>20% | 9<br>23%  | 7<br>35%  | 10<br>29%  | 14<br>39%      | 9<br>26%  | 7<br>25%  | 10<br>43% | 14<br>34%   | 4<br>31%     | 8<br>17%   | 15<br>25%  | 8<br>33%    |
| Quite difficult    | (2)<br>52<br>13%  | 52<br>13%              | -              | 15<br>14%              | 11<br>10% | 24<br>15%      | 42<br>13%   | 9<br>11%       | 39<br>13%  | 11<br>11%      | 46<br>14%   | 5<br>8%        | 30<br>12%   | 22<br>17% | 7<br>18%  | -         | 4<br>11%   | 2<br>6%        | 6<br>17%  | 2<br>7%   | 3<br>13%  | 6<br>15%    | 1<br>8%      | 5<br>11%   | 10<br>17%  | 6<br>25%    |
| Very difficult     | (1)<br>41<br>10%  | 41<br>10%              | -              | 9<br>8%                | 12<br>11% | 16<br>10%      | 31<br>10%   | 10<br>12%      | 29<br>10%  | 11<br>11%      | 33<br>10%   | 8<br>13%       | 19<br>8%  | 18<br>14% | 4<br>10%  | 2<br>10%  | 4<br>11%   | 1<br>3%        | 1<br>3%   | 5<br>18%  | -         | 6<br>15%    | 3<br>23%     | 8<br>17%   | 6<br>10%   | 1<br>4%     |
| NET: Difficult     | 93<br>23%         | 93<br>23%              | -              | 24<br>22%              | 23<br>21% | 40<br>25%      | 73<br>23%   | 19<br>23%      | 68<br>23%  | 22<br>22%      | 79<br>24%   | 13<br>21%      | 49<br>20%   | 40<br>31% | 11<br>28% | 2<br>10%  | 8<br>23%   | 3<br>8%        | 7<br>20%  | 7<br>25%  | 3<br>13%  | 12<br>29%   | 4<br>31%     | 13<br>28%  | 16<br>27%  | 7<br>29%    |
| Don't know/refused | 119<br>30%        | 119<br>30%             | -              | 37<br>34%              | 29<br>26% | 46<br>29%      | 89<br>28%   | 30<br>36%      | 81<br>28%  | 36<br>36%      | 92<br>28%   | 26<br>42%      | 58<br>24%   | 46<br>35% | 12<br>31% | 6<br>30%  | 7<br>20%   | 8<br>22%       | 12<br>34% | 9<br>32%  | 9<br>39%  | 11<br>27%   | 4<br>31%     | 17<br>36%  | 19<br>32%  | 5<br>21%    |
| Mean               | 2.78              | 2.78                   | -              | 2.80                   | 2.89      | 2.71           | 2.81  | 2.68           | 2.81   | 2.71           | 2.80  | 2.61           | 2.93  | 2.54      | 2.70      | 3.07      | 2.93       | 3.25           | 2.96      | 2.63      | 2.86      | 2.53        | 2.33         | 2.60       | 2.67       | 2.79        |
| Standard deviation | 0.99              | 0.99                   | -              | 0.98                   | 1.01      | 0.95           | 0.99  | 1.03           | 0.99   | 1.00           | 0.99  | 1.05           | 0.92  | 1.06      | 1.03      | 1.00      | 1.05       | 0.75           | 0.88      | 1.16      | 0.53      | 0.97        | 1.12         | 1.19       | 1.00       | 0.85        |
| Standard error     | 0.06              | 0.06                   | -              | 0.12                   | 0.11      | 0.09           | 0.07  | 0.14           | 0.07   | 0.12           | 0.06  | 0.17           | 0.07  | 0.12      | 0.20      | 0.27      | 0.20       | 0.14           | 0.18      | 0.27      | 0.14      | 0.18        | 0.37         | 0.22       | 0.16       | 0.20        |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q8. Would you say the illicit trade in tobacco products in your local area has increased, decreased, or stayed about the same over the past 12 months?

Base: All respondents

|                       | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |          |            |                |           |           |           |             |              |            |            |             |
|-----------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----------|-----------|----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                       | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No        | Scot-land | North    | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                       | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315             | 83   | 290             | 101   | 333             | 62  | 246       | 131       | 39       | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| Increased             | 67<br>17%   | 67<br>17%              | -              | 18<br>17%              | 23<br>21% | 26<br>16%      | 57<br>18%   | 10<br>12%       | 51<br>18%  | 15<br>15%       | 61<br>18%   | 6<br>10%        | 54<br>22%   | 10<br>8%  | 2<br>5%   | 6<br>30% | 10<br>29%  | 9<br>25%       | 8<br>23%  | 4<br>14%  | 2<br>9%   | 7<br>17%    | -            | 6<br>13%   | 10<br>17%  | 3<br>13%    |
| Decreased             | 27<br>7%    | 27<br>7%               | -              | 4<br>4%                | 15<br>13% | 8<br>5%        | 21<br>7%  | 6<br>7%         | 19<br>7%   | 8<br>8%         | 21<br>6%  | 6<br>10%        | 21<br>9%  | 6<br>5%   | 4<br>10%  | 1<br>5%  | 3<br>9%    | 1<br>3%        | 2<br>6%   | 1<br>4%   | 1<br>4%   | 7<br>17%    | 2<br>15%     | 1<br>2%    | 4<br>7%    | -           |
| Stayed about the same | 142<br>36%  | 142<br>36%             | -              | 43<br>40%              | 33<br>29% | 57<br>36%      | 119<br>38%  | 21<br>25%       | 113<br>39%   | 24<br>24%       | 128<br>38%  | 11<br>18%       | 97<br>39%   | 42<br>32% | 11<br>28% | 5<br>25% | 13<br>37%  | 13<br>36%      | 10<br>29% | 9<br>32%  | 7<br>30%  | 17<br>41%   | 7<br>54%     | 17<br>36%  | 21<br>36%  | 12<br>50%   |
| Don't know/refused    | 164<br>41%  | 164<br>41%             | -              | 43<br>40%              | 41<br>37% | 69<br>43%      | 118<br>37%  | 46<br>55%       | 107<br>37%   | 54<br>53%       | 123<br>37%  | 39<br>63%       | 74<br>30%   | 73<br>56% | 22<br>56% | 8<br>40% | 9<br>26%   | 13<br>36%      | 15<br>43% | 14<br>50% | 13<br>57% | 10<br>24%   | 4<br>31%     | 23<br>49%  | 24<br>41%  | 9<br>38%    |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q9. Do you believe the illicit trade in tobacco products has an impact on your business?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line | Q5. Importance of indirect revenue from tobacco to bottom line | Q4/ Q5. Importance of direct or indirect sales to bottom line | Q9. Believe illicit trade in tobacco has impact on business |             | Region          |      |      |           |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|--|---|---|-------------|-----------------|------|------|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor -tant   | Not impor -tant  | Impor -tant   | Not impor -tant   | Impor -tant | Not impor -tant | Yes  | No   | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    |             |                        |                |                        |       |                |   |  |   |   |             |                 |      |      |           |       |            |                |           |           |       |             |              |            |            |             |
| Base               | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83   | 290   | 101   | 333         | 62              | 246  | 131  | 39        | 20    | 35         | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |
| Yes                | 246         | 246                    | -              | 66                     | 75    | 97             | 215   | 30   | 200   | 41  | 226         | 18              | 246  | -    | 18        | 15    | 23         | 24             | 25        | 18        | 17    | 23          | 7            | 25         | 38         | 13          |
|                    | 62%         | 62%                    | -              | 61%                    | 67%   | 61%            | 68%   | 36%  | 69%   | 41%   | 68%         | 29%             | 100% | -    | 46%       | 75%   | 66%        | 67%            | 71%       | 64%       | 74%   | 56%         | 54%          | 53%        | 64%        | 54%         |
| No                 | 131         | 131                    | -              | 34                     | 29    | 59             | 78  | 52   | 69  | 58  | 85          | 43              | -    | 131  | 21        | 5     | 10         | 8              | 8         | 7         | 6     | 16          | 4            | 16         | 20         | 10          |
|                    | 33%         | 33%                    | -              | 31%                    | 26%   | 37%            | 25%   | 63%  | 24%   | 57%   | 26%         | 69%             | -    | 100% | 54%       | 25%   | 29%        | 22%            | 23%       | 25%       | 26%   | 39%         | 31%          | 34%        | 34%        | 42%         |
| Don't know/refused | 23          | 23                     | -              | 8                      | 8     | 4              | 22  | 1  | 21  | 2   | 22          | 1               | -    | -    | -         | -     | 2          | 4              | 2         | 3         | -     | 2           | 2            | 6          | 1          | 1           |
|                    | 6%          | 6%                     | -              | 7%                     | 7%    | 3%             | 7%  | 1%   | 7%  | 2%  | 7%          | 2%              | -    | -    | -         | -     | 6%         | 11%            | 6%        | 11%       | -     | 5%          | 15%          | 13%        | 2%         | 4%          |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q10. Do you think enough is being done by the government to fight illicit trade in tobacco products and protect your business?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315             | 83   | 290             | 101   | 333             | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Yes                | 147         | 147                    | -              | 54                     | 42    | 44             | 129   | 18              | 117  | 26              | 135   | 11              | 88  | 45  | 11        | 5     | 12         | 11             | 13        | 16        | 6     | 14          | 7            | 16         | 21         | 15          |
|                    | 37%         | 37%                    | -              | 50%                    | 38%   | 28%            | 41%   | 22%             | 40%  | 26%             | 41%   | 18%             | 36%   | 34% | 28%       | 25%   | 34%        | 31%            | 37%       | 57%       | 26%   | 34%         | 54%          | 34%        | 36%        | 63%         |
| No                 | 173         | 173                    | -              | 34                     | 51    | 82             | 138   | 34              | 129  | 43              | 146   | 26              | 125   | 45  | 21        | 10    | 17         | 15             | 6         | 14        | 18    | 5           | 23           | 23         | 6          | 25%         |
|                    | 43%         | 43%                    | -              | 31%                    | 46%   | 51%            | 44%   | 41%             | 44%  | 43%             | 44%   | 42%             | 51%   | 34% | 54%       | 50%   | 49%        | 42%            | 43%       | 21%       | 61%   | 44%         | 38%          | 49%        | 39%        | 25%         |
| Don't know/refused | 80          | 80                     | -              | 20                     | 19    | 34             | 48  | 31              | 44   | 32              | 52  | 25              | 33  | 41  | 7         | 5     | 6          | 10             | 7         | 6         | 3     | 9           | 1            | 8          | 15         | 3           |
|                    | 20%         | 20%                    | -              | 19%                    | 17%   | 21%            | 15%   | 37%             | 15%  | 32%             | 16%   | 40%             | 13%   | 31% | 18%       | 25%   | 17%        | 28%            | 20%       | 21%       | 13%   | 22%         | 8%           | 17%        | 25%        | 13%         |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q11. Have you read, seen, or heard anything recently about the government considering changes to cigarette packaging, which some have referred to as "plain packaging"?

Base: All respondents

|        | Sample Type |                        |                | Q3. 2012 vs 2011 sales |            |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |            | Region    |            |            |                |           |           |           |             |              |            |            |             |
|--------|-------------|------------------------|----------------|------------------------|------------|----------------|---|----------------|--|----------------|---|----------------|---|------------|-----------|------------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|        | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower      | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No         | Scot-land | North      | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|        | Base        | 400                    | 400            | -                      | 108        | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246        | 131       | 39         | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| Yes    | 343<br>86%  | 343<br>86%             | -              | 93<br>86%              | 101<br>90% | 135<br>84%     | 280<br>89%  | 63<br>76%      | 256<br>88%   | 83<br>82%      | 294<br>88%  | 47<br>76%      | 222<br>90%  | 100<br>76% | 29<br>74% | 20<br>100% | 29<br>83%  | 29<br>81%      | 31<br>89% | 25<br>89% | 21<br>91% | 36<br>88%   | 10<br>77%    | 41<br>87%  | 53<br>90%  | 19<br>79%   |
| No     | 55<br>14%   | 55<br>14%              | -              | 13<br>12%              | 11<br>10%  | 25<br>16%      | 33<br>10%   | 20<br>24%      | 32<br>11%  | 18<br>18%      | 37<br>11%   | 15<br>24%      | 23<br>9%  | 30<br>23%  | 10<br>26% | -          | 5<br>14%   | 7<br>19%       | 4<br>11%  | 3<br>11%  | 2<br>9%   | 5<br>12%    | 3<br>23%     | 6<br>13%   | 6<br>10%   | 4<br>17%    |
| Unsure | 2<br>1%     | 2<br>1%                | -              | 2<br>2%                | -          | -              | 2<br>1%   | -              | 2<br>1%  | -              | 2<br>1%   | -              | 1<br>*  | 1<br>1%    | -         | -          | 1<br>3%    | -              | -         | -         | -         | -           | -            | -          | -          | 1<br>4%     |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q12. When it comes to reducing smoking rates in the UK, where should the government focus its efforts?

-First mention

Base: All respondents

|  | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |           | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |          |             |              |            |            |             |
|--|-------------|------------------------|----------------|------------------------|-----------|-----------|---|-----------------|--|-----------------|---|-----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|----------|-------------|--------------|------------|------------|-------------|
|  | Total       | Petrol Retailer Sample | Populus Sample | About the same         |           |           | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales    | East Anglia | Grter London | South East | South West | Nrt Ireland |
|  |             |                        |                | Higher                 | Lower     | Higher    |   |                 |  |                 |   |                 |   |           |           |           |            |                |           |           |          |             |              |            |            |             |
| Base   | 400         | 400                    | -              | 108                    | 112       | 160       | 315   | 83              | 290  | 101             | 333   | 62              | 246   | 131       | 39        | 20        | 35         | 36             | 35        | 28        | 23       | 41          | 13           | 47         | 59         | 24          |
| More education on ways to quit smoking                                 | 191<br>48%  | 191<br>48%             | -              | 43<br>40%              | 56<br>50% | 79<br>49% | 154<br>49%  | 36<br>43%       | 133<br>46%   | 55<br>54%       | 160<br>48%  | 29<br>47%       | 119<br>48%  | 61<br>47% | 19<br>49% | 13<br>65% | 22<br>63%  | 16<br>44%      | 13<br>37% | 13<br>46% | 9<br>39% | 27<br>66%   | 9<br>69%     | 18<br>38%  | 23<br>39%  | 9<br>38%    |
| Raising taxes to make cigarettes more expensive                        | 55<br>14%   | 55<br>14%              | -              | 15<br>14%              | 17<br>15% | 23<br>14% | 37<br>12%   | 18<br>22%       | 40<br>14%  | 13<br>13%       | 43<br>13%   | 12<br>19%       | 33<br>13%   | 22<br>17% | 7<br>18%  | 2<br>10%  | 4<br>11%   | 7<br>19%       | 2<br>6%   | 7<br>25%  | 3<br>13% | 3<br>7%     | 1<br>8%      | 7<br>15%   | 7<br>12%   | 5<br>21%    |
| Better enforcement of current laws and restrictions related to smoking | 48<br>12%   | 48<br>12%              | -              | 17<br>16%              | 11<br>10% | 18<br>11% | 39<br>12%   | 9<br>11%        | 39<br>13%  | 9<br>9%         | 42<br>13%   | 6<br>10%        | 30<br>12%   | 15<br>11% | 5<br>13%  | 3<br>15%  | 3<br>9%    | 4<br>11%       | 8<br>23%  | 2<br>7%   | 1<br>4%  | 5<br>12%    | 1<br>8%      | 4<br>9%    | 7<br>12%   | 5<br>21%    |
| Further restricting where people can smoke                             | 37<br>9%    | 37<br>9%               | -              | 10<br>9%               | 11<br>10% | 14<br>9%  | 31<br>10%   | 6<br>7%         | 28<br>10%  | 9<br>9%         | 32<br>10%   | 5<br>8%         | 24<br>10%   | 11<br>8%  | 3<br>8%   | -         | 2<br>6%    | 3<br>8%        | 4<br>11%  | 3<br>11%  | 5<br>22% | 1<br>2%     | 1<br>8%      | 7<br>15%   | 5<br>8%    | 3<br>13%    |
| Implementing plain packaging for cigarettes                            | 26<br>7%    | 26<br>7%               | -              | 8<br>7%                | 8<br>7%   | 9<br>6%   | 22<br>7%  | 3<br>4%         | 19<br>7%   | 5<br>5%         | 22<br>7%  | 3<br>5%         | 16<br>7%  | 9<br>7%   | 2<br>5%   | -         | 1<br>3%    | 1<br>3%        | 3<br>9%   | -         | 2<br>9%  | 3<br>7%     | 1<br>8%      | 2<br>4%    | 9<br>15%   | 2<br>8%     |
| Other  | 11<br>3%    | 11<br>3%               | -              | 4<br>4%                | 2<br>2%   | 4<br>3%   | 9<br>3%   | 2<br>2%         | 9<br>3%  | 2<br>2%         | 10<br>3%  | 1<br>2%         | 7<br>3%   | 3<br>2%   | -         | 1<br>5%   | -          | -              | 2<br>6%   | -         | -        | -           | -            | 5<br>11%   | 3<br>5%    | -           |
| None of the above  | 32<br>8%    | 32<br>8%               | -              | 11<br>10%              | 7<br>6%   | 13<br>8%  | 23<br>7%  | 9<br>11%        | 22<br>8%   | 8<br>8%         | 24<br>7%  | 6<br>10%        | 17<br>7%  | 10<br>8%  | 3<br>8%   | 1<br>5%   | 3<br>9%    | 5<br>14%       | 3<br>9%   | 3<br>11%  | 3<br>13% | 2<br>5%     | -            | 4<br>9%    | 5<br>8%    | -           |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q12. When it comes to reducing smoking rates in the UK, where should the government focus its efforts?

-Second mention

Base: All respondents

|  | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |          |            |                |           |           |          |             |              |            |            |             |
|--|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|----------|------------|----------------|-----------|-----------|----------|-------------|--------------|------------|------------|-------------|
|  | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North    | North West | Yorks & Humber | East Mids | West Mids | Wales    | East Anglia | Grter London | South East | South West | Nrt Ireland |
|  | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39       | 20         | 35             | 36        | 35        | 28       | 23          | 41           | 13         | 47         | 59          |
| Better enforcement of current laws and restrictions related to smoking | 88<br>22%   | 88<br>22%              | -              | 23<br>21%              | 22<br>20% | 39<br>24%      | 74<br>23%   | 13<br>16%      | 68<br>23%  | 19<br>19%      | 77<br>23%   | 10<br>16%      | 56<br>23%   | 26<br>20% | 9<br>23%  | 7<br>35% | 11<br>31%  | 9<br>25%       | 11<br>31% | 4<br>14%  | 4<br>17% | 6<br>15%    | 3<br>23%     | 7<br>15%   | 13<br>22%  | 4<br>17%    |
| More education on ways to quit smoking                                 | 84<br>21%   | 84<br>21%              | -              | 23<br>21%              | 26<br>23% | 31<br>19%      | 69<br>22%   | 14<br>17%      | 66<br>23%  | 16<br>16%      | 72<br>22%   | 11<br>18%      | 53<br>22%   | 27<br>21% | 10<br>26% | 2<br>10% | 6<br>17%   | 9<br>25%       | 11<br>31% | 6<br>21%  | 5<br>22% | 5<br>12%    | 2<br>15%     | 13<br>28%  | 11<br>19%  | 4<br>17%    |
| Further restricting where people can smoke                             | 62<br>16%   | 62<br>16%              | -              | 15<br>14%              | 17<br>15% | 28<br>18%      | 47<br>15%   | 15<br>18%      | 47<br>16%  | 15<br>15%      | 51<br>15%   | 11<br>18%      | 38<br>15%   | 23<br>18% | 6<br>15%  | 4<br>20% | 5<br>14%   | 3<br>8%        | 1<br>3%   | 4<br>14%  | 5<br>22% | 12<br>29%   | 1<br>8%      | 9<br>19%   | 7<br>12%   | 5<br>21%    |
| Raising taxes to make cigarettes more expensive                        | 62<br>16%   | 62<br>16%              | -              | 19<br>18%              | 16<br>14% | 22<br>14%      | 48<br>15%   | 14<br>17%      | 36<br>12%  | 24<br>24%      | 49<br>15%   | 12<br>19%      | 40<br>16%   | 20<br>15% | 5<br>13%  | 4<br>20% | 2<br>6%    | 3<br>8%        | 4<br>11%  | 5<br>18%  | 2<br>9%  | 11<br>27%   | 2<br>15%     | 4<br>9%    | 14<br>24%  | 6<br>25%    |
| Implementing plain packaging for cigarettes                            | 31<br>8%    | 31<br>8%               | -              | 7<br>6%                | 8<br>7%   | 14<br>9%       | 22<br>7%  | 9<br>11%       | 23<br>8%   | 6<br>6%        | 26<br>8%  | 5<br>8%        | 18<br>7%  | 12<br>9%  | 4<br>10%  | -        | 1<br>3%    | 1<br>3%        | 3<br>9%   | 3<br>11%  | 3<br>13% | 1<br>2%     | 3<br>23%     | 4<br>9%    | 4<br>7%    | 4<br>17%    |
| Other  | 7<br>2%     | 7<br>2%                | -              | 1<br>1%                | 4<br>4%   | 2<br>1%        | 5<br>2%   | 2<br>2%        | 5<br>2%  | 2<br>2%        | 6<br>2%   | 1<br>2%        | 5<br>2%   | 1<br>1%   | -         | 1<br>5%  | 1<br>3%    | 1<br>3%        | -         | -         | -        | -           | -            | 3<br>6%    | -          | 1<br>4%     |
| None of the above  | 66<br>17%   | 66<br>17%              | -              | 20<br>19%              | 19<br>17% | 24<br>15%      | 50<br>16%   | 16<br>19%      | 45<br>16%  | 19<br>19%      | 52<br>16%   | 12<br>19%      | 36<br>15%   | 22<br>17% | 5<br>13%  | 2<br>10% | 9<br>26%   | 10<br>28%      | 5<br>14%  | 6<br>21%  | 4<br>17% | 6<br>15%    | 2<br>15%     | 7<br>15%   | 10<br>17%  | -           |



## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q12. When it comes to reducing smoking rates in the UK, where should the government focus its efforts?

-First &amp; Second mentions

Base: All respondents

|  | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |           |            |                |           |           |           |             |             |            |            |             |
|--|-------------|------------------------|----------------|------------------------|-----------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----------|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|-------------|------------|------------|-------------|
|  | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No        | Scot-land | North     | West      | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grtr London | South East | South West | Nrt Ireland |
|  |             |                        |                |                        |           |                |   |                 |  |                 |   |                 |   |           |           |           |           |            |                |           |           |           |             |             |            |            |             |
| Base   | 400         | 400                    | -              | 108                    | 112       | 160            | 315   | 83              | 290  | 101             | 333   | 62              | 246   | 131       | 39        | 20        | 35        | 36         | 35             | 28        | 23        | 41        | 13          | 47          | 59         | 24         |             |
| More education on ways to quit smoking                                 | 275<br>69%  | 275<br>69%             | -              | 66<br>61%              | 82<br>73% | 110<br>69%     | 223<br>71%  | 50<br>60%       | 199<br>69%   | 71<br>70%       | 232<br>70%  | 40<br>65%       | 172<br>70%  | 88<br>67% | 29<br>74% | 15<br>75% | 28<br>80% | 25<br>69%  | 24<br>69%      | 19<br>68% | 14<br>61% | 32<br>78% | 11<br>85%   | 31<br>66%   | 34<br>58%  | 13<br>54%  |             |
| Better enforcement of current laws and restrictions related to smoking | 136<br>34%  | 136<br>34%             | -              | 40<br>37%              | 33<br>29% | 57<br>36%      | 113<br>36%  | 22<br>27%       | 107<br>37%   | 28<br>28%       | 119<br>36%  | 16<br>26%       | 86<br>35%   | 41<br>31% | 14<br>36% | 10<br>50% | 14<br>40% | 13<br>36%  | 19<br>54%      | 6<br>21%  | 5<br>22%  | 11<br>27% | 4<br>31%    | 11<br>23%   | 20<br>34%  | 9<br>38%   |             |
| Raising taxes to make cigarettes more expensive                        | 117<br>29%  | 117<br>29%             | -              | 34<br>31%              | 33<br>29% | 45<br>28%      | 85<br>27%   | 32<br>39%       | 76<br>26%  | 37<br>37%       | 92<br>28%   | 24<br>39%       | 73<br>30%   | 42<br>32% | 12<br>31% | 6<br>30%  | 6<br>17%  | 10<br>28%  | 6<br>17%       | 12<br>43% | 5<br>22%  | 14<br>34% | 3<br>23%    | 11<br>23%   | 21<br>36%  | 11<br>46%  |             |
| Further restricting where people can smoke                             | 99<br>25%   | 99<br>25%              | -              | 25<br>23%              | 28<br>25% | 42<br>26%      | 78<br>25%   | 21<br>25%       | 75<br>26%  | 24<br>24%       | 83<br>25%   | 16<br>26%       | 62<br>25%   | 34<br>26% | 9<br>23%  | 4<br>20%  | 7<br>20%  | 6<br>17%   | 5<br>14%       | 7<br>25%  | 10<br>43% | 13<br>32% | 2<br>15%    | 16<br>34%   | 12<br>20%  | 8<br>33%   |             |
| Implementing plain packaging for cigarettes                            | 57<br>14%   | 57<br>14%              | -              | 15<br>14%              | 16<br>14% | 23<br>14%      | 44<br>14%   | 12<br>14%       | 42<br>14%  | 11<br>11%       | 48<br>14%   | 8<br>13%        | 34<br>14%   | 21<br>16% | 6<br>15%  | -         | 2<br>6%   | 2<br>6%    | 6<br>17%       | 3<br>11%  | 5<br>22%  | 4<br>10%  | 4<br>31%    | 6<br>13%    | 13<br>22%  | 6<br>25%   |             |
| Other  | 17<br>4%    | 17<br>4%               | -              | 4<br>4%                | 6<br>5%   | 6<br>4%        | 13<br>4%  | 4<br>5%         | 13<br>4%   | 4<br>4%         | 15<br>5%  | 2<br>3%         | 11<br>4%  | 4<br>3%   | -         | 1<br>5%   | 1<br>3%   | 1<br>3%    | 2<br>6%        | -         | -         | -         | -           | -           | 8<br>17%   | 3<br>5%    | 1<br>4%     |
| None of the above  | 32<br>8%    | 32<br>8%               | -              | 11<br>10%              | 7<br>6%   | 13<br>8%       | 23<br>7%  | 9<br>11%        | 22<br>8%   | 8<br>8%         | 24<br>7%  | 6<br>10%        | 17<br>7%  | 10<br>8%  | 3<br>8%   | 1<br>5%   | 3<br>9%   | 5<br>14%   | 3<br>9%        | 3<br>11%  | 3<br>13%  | 2<br>5%   | -           | 4<br>9%     | 5<br>8%    | -          |             |

**UK Retailers Survey**  
**CATI Fieldwork : 4th September - 5th November 2012**

Absolutes/col percents

Sample: RMI

Q13-Q17. Please say whether you think plain packaging will or will not cause the following to happen.

-Summary

Base: All respondents

|                       | Q13-Q17. Summary  |   |   |  |  |
|-----------------------|---|---|---|--|--|
|                       | Make it easier to produce counterfeit cigarettes because all packs will look the same | Lead to an increase in branded packs smuggled from abroad | Result in people bringing back more branded packs from their travels abroad | Cause people to turn to the black market, where they can access cheap, branded packs | Harm honest retailers because people will buy their cigarettes from the black market |
| Base                  | 400   | 400   | 400   | 400  | 400  |
| Think will happen     | 352<br>88%  | 296<br>74%  | 328<br>82%  | 303<br>76%   | 291<br>73%   |
| Think will not happen | 48<br>12%   | 104<br>26%  | 72<br>18%   | 97<br>24%  | 109<br>27%   |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q13. Please say whether you think plain packaging will or will not cause the following to happen.

-Make it easier to produce counterfeit cigarettes because all packs will look the same

Base: All respondents

|                       | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |            | Region    |           |            |                |           |           |            |             |              |            |            |             |
|-----------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|------------|-----------|-----------|------------|----------------|-----------|-----------|------------|-------------|--------------|------------|------------|-------------|
|                       | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No         | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales      | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                       | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246        | 131       | 39        | 20         | 35             | 36        | 35        | 28         | 23          | 41           | 13         | 47         | 59          |
| Think will happen     | 352<br>88%  | 352<br>88%             | -              | 99<br>92%              | 96<br>86% | 142<br>89%     | 276<br>88%  | 74<br>89%      | 255<br>88%   | 90<br>89%      | 291<br>87%  | 57<br>92%      | 222<br>90%  | 110<br>84% | 34<br>87% | 19<br>95% | 32<br>91%  | 32<br>89%      | 30<br>86% | 23<br>82% | 23<br>100% | 38<br>93%   | 9<br>69%     | 40<br>85%  | 50<br>85%  | 22<br>92%   |
| Think will not happen | 48<br>12%   | 48<br>12%              | -              | 9<br>8%                | 16<br>14% | 18<br>11%      | 39<br>12%   | 9<br>11%       | 35<br>12%  | 11<br>11%      | 42<br>13%   | 5<br>8%        | 24<br>10%   | 21<br>16%  | 5<br>13%  | 1<br>5%   | 3<br>9%    | 4<br>11%       | 5<br>14%  | 5<br>18%  | -          | 3<br>7%     | 4<br>31%     | 7<br>15%   | 9<br>15%   | 2<br>8%     |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q14. Please say whether you think plain packaging will or will not cause the following to happen.

-Lead to an increase in branded packs smuggled from abroad

Base: All respondents

|                       | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|-----------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                       | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                       | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| Think will happen     | 296<br>74%  | 296<br>74%             | -              | 86<br>80%              | 77<br>69% | 122<br>76%     | 238<br>76%  | 56<br>67%      | 219<br>76%   | 72<br>71%      | 252<br>76%  | 41<br>66%      | 192<br>78%  | 89<br>68% | 27<br>69% | 19<br>95% | 25<br>71%  | 26<br>72%      | 26<br>74% | 21<br>75% | 20<br>87% | 28<br>68%   | 9<br>69%     | 33<br>70%  | 44<br>75%  | 18<br>75%   |
| Think will not happen | 104<br>26%  | 104<br>26%             | -              | 22<br>20%              | 35<br>31% | 38<br>24%      | 77<br>24%   | 27<br>33%      | 71<br>24%  | 29<br>29%      | 81<br>24%   | 21<br>34%      | 54<br>22%   | 42<br>32% | 12<br>31% | 1<br>5%   | 10<br>29%  | 10<br>28%      | 9<br>26%  | 7<br>25%  | 3<br>13%  | 13<br>32%   | 4<br>31%     | 14<br>30%  | 15<br>25%  | 6<br>25%    |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q15. Please say whether you think plain packaging will or will not cause the following to happen.

-Result in people bringing back more branded packs from their travels abroad

Base: All respondents

|                       | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |            | Region    |           |            |                |           |           |           |             |              |            |            |             |
|-----------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|------------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                       | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No         | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                       |             |                        |                |                        |           |                |   |                |  |                |   |                |   |            |           |           |            |                |           |           |           |             |              |            |            |             |
| Base                  | 400         | 400                    | -              | 108                    | 112       | 160            | 315   | 83             | 290  | 101            | 333   | 62             | 246   | 131        | 39        | 20        | 35         | 36             | 35        | 28        | 23        | 41          | 13           | 47         | 59         | 24          |
| Think will happen     | 328<br>82%  | 328<br>82%             | -              | 93<br>86%              | 91<br>81% | 129<br>81%     | 264<br>84%  | 62<br>75%      | 241<br>83%   | 79<br>78%      | 278<br>83%  | 46<br>74%      | 206<br>84%  | 102<br>78% | 32<br>82% | 17<br>85% | 29<br>83%  | 30<br>83%      | 26<br>74% | 23<br>82% | 20<br>87% | 37<br>90%   | 9<br>69%     | 37<br>79%  | 48<br>81%  | 20<br>83%   |
| Think will not happen | 72<br>18%   | 72<br>18%              | -              | 15<br>14%              | 21<br>19% | 31<br>19%      | 51<br>16%   | 21<br>25%      | 49<br>17%  | 22<br>22%      | 55<br>17%   | 16<br>26%      | 40<br>16%   | 29<br>22%  | 7<br>18%  | 3<br>15%  | 6<br>17%   | 6<br>17%       | 9<br>26%  | 5<br>18%  | 3<br>13%  | 4<br>10%    | 4<br>31%     | 10<br>21%  | 11<br>19%  | 4<br>17%    |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q16. Please say whether you think plain packaging will or will not cause the following to happen.

-Cause people to turn to the black market, where they can access cheap, branded packs

Base: All respondents

|                       | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|-----------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                       | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                       | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| Think will happen     | 303<br>76%  | 303<br>76%             | -              | 82<br>76%              | 84<br>75% | 124<br>78%     | 242<br>77%  | 59<br>71%      | 227<br>78%   | 71<br>70%      | 258<br>77%  | 42<br>68%      | 193<br>78%  | 92<br>70% | 26<br>67% | 17<br>85% | 25<br>71%  | 29<br>81%      | 28<br>80% | 23<br>82% | 20<br>87% | 31<br>76%   | 10<br>77%    | 32<br>68%  | 44<br>75%  | 18<br>75%   |
| Think will not happen | 97<br>24%   | 97<br>24%              | -              | 26<br>24%              | 28<br>25% | 36<br>23%      | 73<br>23%   | 24<br>29%      | 63<br>22%  | 30<br>30%      | 75<br>23%   | 20<br>32%      | 53<br>22%   | 39<br>30% | 13<br>33% | 3<br>15%  | 10<br>29%  | 7<br>19%       | 7<br>20%  | 5<br>18%  | 3<br>13%  | 10<br>24%   | 3<br>23%     | 15<br>32%  | 15<br>25%  | 6<br>25%    |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q17. Please say whether you think plain packaging will or will not cause the following to happen.

-Harm honest retailers because people will buy their cigarettes from the black market

Base: All respondents

|                       | Total      | Sample Type            |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|-----------------------|------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                       |            | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                       |            |                        |                |                        |           |                |   |                |  |                |   |                |   |           |           |           |            |                |           |           |           |             |              |            |            |             |
| Base                  | 400        | 400                    | -              | 108                    | 112       | 160            | 315   | 83             | 290  | 101            | 333   | 62             | 246   | 131       | 39        | 20        | 35         | 36             | 35        | 28        | 23        | 41          | 13           | 47         | 59         | 24          |
| Think will happen     | 291<br>73% | 291<br>73%             | -              | 78<br>72%              | 86<br>77% | 114<br>71%     | 235<br>75%  | 54<br>65%      | 220<br>76%   | 65<br>64%      | 247<br>74%  | 41<br>66%      | 193<br>78%  | 81<br>62% | 27<br>69% | 16<br>80% | 28<br>80%  | 30<br>83%      | 21<br>60% | 21<br>75% | 18<br>78% | 29<br>71%   | 8<br>62%     | 37<br>79%  | 40<br>68%  | 16<br>67%   |
| Think will not happen | 109<br>27% | 109<br>27%             | -              | 30<br>28%              | 26<br>23% | 46<br>29%      | 80<br>25%   | 29<br>35%      | 70<br>24%  | 36<br>36%      | 86<br>26%   | 21<br>34%      | 53<br>22%   | 50<br>38% | 12<br>31% | 4<br>20%  | 7<br>20%   | 6<br>17%       | 14<br>40% | 7<br>25%  | 5<br>22%  | 12<br>29%   | 5<br>38%     | 10<br>21%  | 19<br>32%  | 8<br>33%    |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q18. And, if the Government did decide to proceed forward and pass plain packaging legislation, do you believe this would have a negative impact on your business?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line | Q5. Importance of indirect revenue from tobacco to bottom line | Q4/ Q5. Importance of direct or indirect sales to bottom line | Q9. Believe illicit trade in tobacco has impact on business |             | Region          |     |     |           |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|--|---|---|-------------|-----------------|-----|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor -tant   | Not impor -tant  | Impor -tant   | Not impor -tant   | Impor -tant | Not impor -tant | Yes | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315  | 83  | 290   | 101         | 333             | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Yes                | 260         | 260                    | -              | 68                     | 76    | 103            | 223   | 36   | 211   | 44  | 238         | 20              | 192 | 52  | 20        | 12    | 23         | 30             | 23        | 18        | 17    | 29          | 7            | 27         | 39         | 15          |
|                    | 65%         | 65%                    | -              | 63%                    | 68%   | 64%            | 71%   | 43%  | 73%   | 44%   | 71%         | 32%             | 78% | 40% | 51%       | 60%   | 66%        | 83%            | 66%       | 64%       | 74%   | 71%         | 54%          | 57%        | 66%        | 63%         |
| No                 | 133         | 133                    | -              | 38                     | 35    | 54             | 85  | 47   | 73  | 56  | 88          | 42              | 51  | 75  | 19        | 8     | 10         | 6              | 12        | 10        | 6     | 11          | 4            | 18         | 20         | 9           |
|                    | 33%         | 33%                    | -              | 35%                    | 31%   | 34%            | 27%   | 57%  | 25%   | 55%   | 26%         | 68%             | 21% | 57% | 49%       | 40%   | 29%        | 17%            | 34%       | 36%       | 26%   | 27%         | 31%          | 38%        | 34%        | 38%         |
| Don't know/refused | 7           | 7                      | -              | 2                      | 1     | 3              | 7   | -  | 6   | 1   | 7           | -               | 3   | 4   | -         | -     | 2          | -              | -         | -         | -     | 1           | 2            | 2          | -          | -           |
|                    | 2%          | 2%                     | -              | 2%                     | 1%    | 2%             | 2%  | -  | 2%  | 1%  | 2%          | -               | 1%  | 3%  | -         | -     | 6%         | -              | -         | -         | -     | 2%          | 15%          | 4%         | -          | -           |



## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

**Q19. How familiar are you with the point of sale display ban on tobacco products that is starting to be implemented in some retail shops here in the UK?**

Base: All respondents

|   | Sample Type            |                |   | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |  |
|---|------------------------|----------------|---|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|--|
|   | Petrol Retailer Sample | Populus Sample |   | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |  |
|   | Total                  |                |   |                        |       |                |   |                |  |                |   |                |   |     |           |       |            |                |           |           |       |             |              |            |            |             |  |
| Base  | 400                    | 400            | - | 108                    | 112   | 160            | 315   | 83             | 290  | 101            | 333   | 62             | 246   | 131 | 39        | 20    | 35         | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |  |
| NET: Aware of                               | 369                    | 369            | - | 101                    | 102   | 148            | 298   | 70             | 274  | 88             | 315   | 50             | 234   | 113 | 31        | 18    | 33         | 34             | 32        | 27        | 22    | 40          | 12           | 46         | 50         | 24          |  |
|   | 92%                    | 92%            | - | 94%                    | 91%   | 93%            | 95%   | 84%            | 94%  | 87%            | 95%   | 81%            | 95%   | 86% | 79%       | 90%   | 94%        | 94%            | 91%       | 96%       | 96%   | 98%         | 92%          | 98%        | 85%        | 100%        |  |
| NET: Very/ Quite familiar                   | 304                    | 304            | - | 89                     | 84    | 118            | 259   | 44             | 238  | 61             | 273   | 28             | 206   | 80  | 21        | 14    | 33         | 31             | 28        | 24        | 15    | 30          | 9            | 39         | 40         | 20          |  |
|   | 76%                    | 76%            | - | 82%                    | 75%   | 74%            | 82%   | 53%            | 82%  | 60%            | 82%   | 45%            | 84%   | 61% | 54%       | 70%   | 94%        | 86%            | 80%       | 86%       | 65%   | 73%         | 69%          | 83%        | 68%        | 83%         |  |
| I have already had to implement in my shop  | 1                      | 1              | - | 1                      | -     | -              | 1   | -              | -  | 1              | 1   | -              | 1   | -   | -         | -     | -          | -              | 1         | -         | -     | -           | -            | -          | -          | -           |  |
|   | *                      | *              | - | 1%                     | -     | -              | *   | -              | -  | 1%             | *   | -              | *   | -   | -         | -     | -          | -              | 3%        | -         | -     | -           | -            | -          | -          | -           |  |
| Very familiar                               | 127                    | 127            | - | 43                     | 35    | 46             | 113   | 13             | 101  | 22             | 118   | 6              | 88  | 33  | 7         | 5     | 14         | 16             | 14        | 9         | 5     | 9           | 4            | 18         | 13         | 13          |  |
|   | 32%                    | 32%            | - | 40%                    | 31%   | 29%            | 36%   | 16%            | 35%  | 22%            | 35%   | 10%            | 36%   | 25% | 18%       | 25%   | 40%        | 44%            | 40%       | 32%       | 22%   | 22%         | 31%          | 38%        | 22%        | 54%         |  |
| Quite familiar                              | 176                    | 176            | - | 45                     | 49    | 72             | 145   | 31             | 137  | 38             | 154   | 22             | 117   | 47  | 14        | 9     | 19         | 15             | 13        | 15        | 10    | 21          | 5            | 21         | 27         | 7           |  |
|   | 44%                    | 44%            | - | 42%                    | 44%   | 45%            | 46%   | 37%            | 47%  | 38%            | 46%   | 35%            | 48%   | 36% | 36%       | 45%   | 54%        | 42%            | 37%       | 54%       | 43%   | 51%         | 38%          | 45%        | 46%        | 29%         |  |
| I have heard about it, but I'm not familiar | 65                     | 65             | - | 12                     | 18    | 30             | 39  | 26             | 36   | 27             | 42  | 22             | 28  | 33  | 10        | 4     | -          | 3              | 4         | 3         | 7     | 10          | 3            | 7          | 10         | 4           |  |
|   | 16%                    | 16%            | - | 11%                    | 16%   | 19%            | 12%   | 31%            | 12%  | 27%            | 13%   | 35%            | 11%   | 25% | 26%       | 20%   | -          | 8%             | 11%       | 11%       | 30%   | 24%         | 23%          | 15%        | 17%        |             |  |
| Haven't heard of it                         | 30                     | 30             | - | 7                      | 10    | 11             | 17  | 12             | 16   | 12             | 18  | 11             | 12  | 17  | 7         | 2     | 2          | 2              | 3         | 1         | 1     | 1           | 1            | 1          | 9          | -           |  |
|   | 8%                     | 8%             | - | 6%                     | 9%    | 7%             | 5%  | 14%            | 6%   | 12%            | 5%  | 18%            | 5%  | 13% | 18%       | 10%   | 6%         | 6%             | 9%        | 4%        | 4%    | 2%          | 8%           | 2%         | 15%        | -           |  |
| Don't know/refused                          | 1                      | 1              | - | -                      | -     | 1              | -   | 1              | -  | 1              | -   | 1              | -   | 1   | 1         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |  |
|   | *                      | *              | - | -                      | -     | 1%             | -   | 1%             | -  | 1%             | -   | 2%             | -   | 1%  | 3%        | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |  |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q20. Which of these two statements do you agree with most, even if you don't agree with either fully?

Base: All respondents

|  | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|--|-------------|------------------------|----------------|------------------------|-----------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|  | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anqlia | Grter London | South East | South West | Nrt Ireland |
|  | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315             | 83   | 290             | 101   | 333             | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| The Government has gone too far with tobacco regulations like this - it is extreme, won't stop young people from experimenting with smoking or help adults quit, and it will hurt legitimate retailers.                                  | 291<br>73%  | 291<br>73%             | -              | 77<br>71%              | 89<br>79% | 114<br>71%     | 235<br>75%  | 55<br>66%       | 220<br>76%   | 66<br>65%       | 248<br>74%  | 40<br>65%       | 187<br>76%  | 87<br>66% | 26<br>67% | 16<br>80% | 27<br>77%  | 30<br>83%      | 26<br>74% | 21<br>75% | 18<br>78% | 30<br>73%   | 6<br>46%     | 30<br>64%  | 41<br>69%  | 20<br>83%   |
| Regulations like the point of sale display ban are the right move and the Government should continue to regulate tobacco further, because it will stop young people from experimenting with smoking and encourage adult smokers to quit. | 109<br>27%  | 109<br>27%             | -              | 31<br>29%              | 23<br>21% | 46<br>29%      | 80<br>25%   | 28<br>34%       | 70<br>24%  | 35<br>35%       | 85<br>26%   | 22<br>35%       | 59<br>24%   | 44<br>34% | 13<br>33% | 4<br>20%  | 8<br>23%   | 6<br>17%       | 9<br>26%  | 7<br>25%  | 5<br>22%  | 11<br>27%   | 7<br>54%     | 17<br>36%  | 18<br>31%  | 4<br>17%    |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q21. Thinking once more about the tobacco point of sale display ban, tell me if you agree or disagree with the following statement,

"If customers cannot even see the cigarette packets because they are banned from view at the point of sale, then plain packaging just doesn't make any sense."

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |      | Region    |       |      |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|------|-----------|-------|------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No   | Scot-land | North | West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    |             |                        |                |                        |       |                |   |                |  |                |   |                |   |      |           |       |      |                |           |           |       |             |              |            |            |             |
| Base               | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83             | 290  | 101            | 333   | 62             | 246   | 131  | 39        | 20    | 35   | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |
| NET: Agree         | 354         | 354                    | -              | 93                     | 95    | 148            | 282   | 70             | 261  | 86             | 298   | 51             | 220   | 114  | 37        | 20    | 32   | 29             | 30        | 24        | 23    | 35          | 9            | 40         | 53         | 22          |
|                    | 89%         | 89%                    | -              | 86%                    | 85%   | 93%            | 90%   | 84%            | 90%  | 85%            | 89%   | 82%            | 89%   | 87%  | 95%       | 100%  | 91%  | 81%            | 86%       | 86%       | 100%  | 85%         | 69%          | 85%        | 90%        | 92%         |
| Agree Strongly     | (4) 267     | 267                    | -              | 67                     | 75    | 112            | 222   | 44             | 208  | 58             | 238   | 28             | 180   | 73   | 28        | 14    | 25   | 21             | 23        | 21        | 15    | 25          | 9            | 30         | 39         | 17          |
|                    | 67%         | 67%                    | -              | 62%                    | 67%   | 70%            | 70%   | 53%            | 72%  | 57%            | 71%   | 45%            | 73%   | 56%  | 72%       | 70%   | 71%  | 58%            | 66%       | 75%       | 65%   | 61%         | 69%          | 64%        | 66%        | 71%         |
| Agree Somewhat     | (3) 87      | 87                     | -              | 26                     | 20    | 36             | 60  | 26             | 53   | 28             | 60  | 23             | 40  | 41   | 9         | 6     | 7    | 8              | 7         | 3         | 8     | 10          | -            | 10         | 14         | 5           |
|                    | 22%         | 22%                    | -              | 24%                    | 18%   | 23%            | 19%   | 31%            | 18%  | 28%            | 18%   | 37%            | 16%   | 31%  | 23%       | 30%   | 20%  | 22%            | 20%       | 11%       | 35%   | 24%         | -            | 21%        | 24%        | 21%         |
| Disagree Somewhat  | (2) 20      | 20                     | -              | 7                      | 7     | 6              | 12  | 8              | 12   | 7              | 14  | 6              | 9   | 10   | 1         | -     | 2    | 3              | 2         | 2         | -     | 2           | 1            | 4          | 1          | 2           |
|                    | 5%          | 5%                     | -              | 6%                     | 6%    | 4%             | 4%  | 10%            | 4%   | 7%             | 4%  | 10%            | 4%  | 8%   | 3%        | -     | 6%   | 8%             | 6%        | 7%        | -     | 5%          | 8%           | 9%         | 2%         | 8%          |
| Disagree Strongly  | (1) 25      | 25                     | -              | 8                      | 10    | 5              | 20  | 5              | 16   | 8              | 20  | 5              | 17  | 6    | 1         | -     | 1    | 4              | 3         | 2         | -     | 3           | 3            | 3          | 5          | -           |
|                    | 6%          | 6%                     | -              | 7%                     | 9%    | 3%             | 6%  | 6%             | 6%   | 8%             | 6%  | 8%             | 7%  | 5%   | 3%        | -     | 3%   | 11%            | 9%        | 7%        | -     | 7%          | 23%          | 6%         | 8%         | -           |
| NET: Disagree      | 45          | 45                     | -              | 15                     | 17    | 11             | 32  | 13             | 28   | 15             | 34  | 11             | 26  | 16   | 2         | -     | 3    | 7              | 5         | 4         | -     | 5           | 4            | 7          | 6          | 2           |
|                    | 11%         | 11%                    | -              | 14%                    | 15%   | 7%             | 10%   | 16%            | 10%  | 15%            | 10%   | 18%            | 11%   | 12%  | 5%        | -     | 9%   | 19%            | 14%       | 14%       | -     | 12%         | 31%          | 15%        | 10%        | 8%          |
| Don't know/refused | 1           | 1                      | -              | -                      | -     | 1              | 1   | -              | 1  | -              | 1   | -              | -   | 1    | -         | -     | -    | -              | -         | -         | -     | 1           | -            | -          | -          | -           |
|                    | *           | *                      | -              | -                      | -     | 1%             | *   | -              | *  | -              | *   | -              | -   | 1%   | -         | -     | -    | -              | -         | -         | -     | 2%          | -            | -          | -          | -           |
| Mean               | 3.49        | 3.49                   | -              | 3.41                   | 3.43  | 3.60           | 3.54  | 3.31           | 3.57   | 3.35           | 3.55  | 3.19           | 3.56  | 3.39 | 3.64      | 3.70  | 3.60 | 3.28           | 3.43      | 3.54      | 3.65  | 3.42        | 3.15         | 3.43       | 3.47       | 3.63        |
| Standard deviation | 0.85        | 0.85                   | -              | 0.91                   | 0.96  | 0.71           | 0.84  | 0.88           | 0.81   | 0.92           | 0.83  | 0.92           | 0.86  | 0.82 | 0.67      | 0.47  | 0.74 | 1.03           | 0.95      | 0.92      | 0.49  | 0.90        | 1.34         | 0.90       | 0.90       | 0.65        |
| Standard error     | 0.04        | 0.04                   | -              | 0.09                   | 0.09  | 0.06           | 0.05  | 0.10           | 0.05   | 0.09           | 0.05  | 0.12           | 0.05  | 0.07 | 0.11      | 0.11  | 0.12 | 0.17           | 0.16      | 0.17      | 0.10  | 0.14        | 0.37         | 0.13       | 0.13       |             |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q22. Have you read, seen, or heard anything about a loophole in the UK law that allows people 18 and over to purchase cigarettes for minors? This is often referred to as "proxy purchase".

Base: All respondents

|     | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|-----|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|     | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|     | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| Yes | 153<br>38%  | 153<br>38%             | -              | 41<br>38%              | 42<br>38% | 60<br>38%      | 133<br>42%  | 19<br>23%      | 125<br>43%   | 23<br>23%      | 140<br>42%  | 11<br>18%      | 100<br>41%  | 44<br>34% | 13<br>33% | 6<br>30%  | 13<br>37%  | 15<br>42%      | 8<br>23%  | 18<br>64% | 6<br>26%  | 15<br>37%   | 8<br>62%     | 20<br>43%  | 22<br>37%  | 9<br>38%    |
| No  | 247<br>62%  | 247<br>62%             | -              | 67<br>62%              | 70<br>63% | 100<br>63%     | 182<br>58%  | 64<br>77%      | 165<br>57%   | 78<br>77%      | 193<br>58%  | 51<br>82%      | 146<br>59%  | 87<br>66% | 26<br>67% | 14<br>70% | 22<br>63%  | 21<br>58%      | 27<br>77% | 10<br>36% | 17<br>74% | 26<br>63%   | 5<br>38%     | 27<br>57%  | 37<br>63%  | 15<br>63%   |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

Q23. Do you think that when it comes to preventing kids from smoking, the Government should:

Base: All respondents

|   | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |           |            |                |           |           |           |             |              |            |            |             |
|---|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|   | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|   | Base        | 400                    | 400            | -                      | 108       | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246       | 131       | 39        | 20         | 35             | 36        | 35        | 28        | 23          | 41           | 13         | 47         | 59          |
| Work to close this loophole before introducing other restrictions | 301<br>75%  | 301<br>75%             | -              | 88<br>81%              | 82<br>73% | 116<br>73%     | 242<br>77%  | 58<br>70%      | 222<br>77%   | 75<br>74%      | 252<br>76%  | 46<br>74%      | 189<br>77%  | 96<br>73% | 28<br>72% | 16<br>80% | 28<br>80%  | 23<br>64%      | 32<br>91% | 16<br>57% | 19<br>83% | 29<br>71%   | 8<br>62%     | 39<br>83%  | 44<br>75%  | 19<br>79%   |
| Focus on introducing other restrictions first                     | 79<br>20%   | 79<br>20%              | -              | 15<br>14%              | 25<br>22% | 35<br>22%      | 58<br>18%   | 20<br>24%      | 57<br>20%  | 18<br>18%      | 66<br>20%   | 12<br>19%      | 46<br>19%   | 27<br>21% | 10<br>26% | 4<br>20%  | 5<br>14%   | 10<br>28%      | 3<br>9%   | 11<br>39% | 4<br>17%  | 8<br>20%    | 2<br>15%     | 5<br>11%   | 13<br>22%  | 4<br>17%    |
| Don't know/refused  | 20<br>5%    | 20<br>5%               | -              | 5<br>5%                | 5<br>4%   | 9<br>6%        | 15<br>5%  | 5<br>6%        | 11<br>4%   | 8<br>8%        | 15<br>5%  | 4<br>6%        | 11<br>4%  | 8<br>6%   | 1<br>3%   | -         | 2<br>6%    | 3<br>8%        | -         | 1<br>4%   | -         | 4<br>10%    | 3<br>23%     | 3<br>6%    | 2<br>3%    | 1<br>4%     |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

D1. What is the highest educational level that you have achieved to date?

Base: All respondents

|   | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|---|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|   | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|   | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315            | 83   | 290            | 101   | 333            | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Secondary school, high school, NVQ levels 1 to 3, etc.                        | 279         | 279                    | -              | 74                     | 75    | 115            | 230   | 47             | 206  | 67             | 238   | 38             | 175   | 88  | 26        | 17    | 29         | 25             | 26        | 20        | 20    | 25          | 8            | 31         | 39         | 13          |
|   | 70%         | 70%                    | -              | 69%                    | 67%   | 72%            | 73%   | 57%            | 71%  | 66%            | 71%   | 61%            | 71%   | 67% | 67%       | 85%   | 83%        | 69%            | 74%       | 71%       | 87%   | 61%         | 62%          | 66%        | 66%        | 54%         |
| University degree or equivalent professional qualification, NVQ level 4, etc. | 93          | 93                     | -              | 24                     | 29    | 37             | 65  | 28             | 65   | 26             | 74  | 18             | 55  | 34  | 6         | 1     | 5          | 9              | 8         | 6         | 3     | 12          | 4            | 12         | 17         | 10          |
|   | 23%         | 23%                    | -              | 22%                    | 26%   | 23%            | 21%   | 34%            | 22%  | 26%            | 22%   | 29%            | 22%   | 26% | 15%       | 5%    | 14%        | 25%            | 23%       | 21%       | 13%   | 29%         | 31%          | 26%        | 29%        | 42%         |
| Higher university degree, doctorate, MBA, NVQ level 5, etc.                   | 19          | 19                     | -              | 8                      | 4     | 5              | 16  | 3              | 15   | 4              | 16  | 3              | 13  | 4   | 3         | 2     | 1          | 2              | -         | -         | -     | 3           | 1            | 3          | 3          | 1           |
|   | 5%          | 5%                     | -              | 7%                     | 4%    | 3%             | 5%  | 4%             | 5%   | 4%             | 5%  | 5%             | 5%  | 3%  | 8%        | 10%   | 3%         | 6%             | -         | -         | -     | 7%          | 8%           | 6%         | 5%         | 4%          |
| Still in full time education  | -           | -                      | -              | -                      | -     | -              | -   | -              | -  | -              | -   | -              | -   | -   | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| Prefer not to answer  | 8           | 8                      | -              | 2                      | 3     | 3              | 4   | 4              | 4  | 3              | 5   | 2              | 2   | 5   | 4         | -     | -          | -              | 1         | 2         | -     | 1           | -            | -          | -          | -           |
|   | 2%          | 2%                     | -              | 2%                     | 3%    | 2%             | 1%  | 5%             | 1%   | 3%             | 2%  | 3%             | 1%  | 4%  | 10%       | -     | -          | -              | 3%        | 7%        | -     | 2%          | -            | -          | -          | -           |
| Don't know  | 1           | 1                      | -              | -                      | 1     | -              | -   | 1              | -  | 1              | -   | 1              | 1   | -   | -         | -     | -          | -              | -         | -         | -     | -           | -            | 1          | -          | -           |
|   | *           | *                      | -              | -                      | 1%    | -              | -   | 1%             | -  | 1%             | -   | 2%             | *   | -   | -         | -     | -          | -              | -         | -         | -     | -           | -            | 2%         | -          | -           |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

D2. How many retail locations do you own/manage?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line | Q5. Importance of indirect revenue from tobacco to bottom line | Q4/ Q5. Importance of direct or indirect sales to bottom line | Q9. Believe illicit trade in tobacco has impact on business |            | Region         |     |     |           |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|--|---|---|------------|----------------|-----|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant   | Impor-tant  | Not impor-tant  | Impor-tant | Not impor-tant | Yes | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    |             |                        |                |                        |       |                |   |  |   |   |            |                |     |     |           |       |            |                |           |           |       |             |              |            |            |             |
| Base               | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83   | 290   | 101   | 333        | 62             | 246 | 131 | 39        | 20    | 35         | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |
| 1                  | 312         | 312                    | -              | 84                     | 85    | 129            | 243   | 68   | 220   | 86  | 256        | 54             | 194 | 103 | 25        | 10    | 27         | 29             | 30        | 21        | 17    | 34          | 8            | 38         | 50         | 23          |
|                    | 78%         | 78%                    | -              | 78%                    | 76%   | 81%            | 77%   | 82%  | 76%   | 85%   | 77%        | 87%            | 79% | 79% | 64%       | 50%   | 77%        | 81%            | 86%       | 75%       | 74%   | 83%         | 62%          | 81%        | 85%        | 96%         |
| 2                  | 53          | 53                     | -              | 15                     | 16    | 18             | 47  | 5  | 45  | 7   | 48         | 4              | 34  | 13  | 10        | 5     | 4          | 4              | 2         | 3         | 5     | 4           | 5            | 6          | 5          | -           |
|                    | 13%         | 13%                    | -              | 14%                    | 14%   | 11%            | 15%   | 6%   | 16%   | 7%  | 14%        | 6%             | 14% | 10% | 26%       | 25%   | 11%        | 11%            | 6%        | 11%       | 22%   | 10%         | 38%          | 13%        | 8%         | -           |
| 3                  | 13          | 13                     | -              | 4                      | 5     | 4              | 9   | 4  | 9   | 4   | 12         | 1              | 6   | 7   | 1         | -     | 1          | 1              | 2         | 2         | 1     | 1           | -            | 2          | 2          | -           |
|                    | 3%          | 3%                     | -              | 4%                     | 4%    | 3%             | 3%  | 5%   | 3%  | 4%  | 4%         | 2%             | 2%  | 5%  | 3%        | -     | 3%         | 3%             | 6%        | 7%        | 4%    | 2%          | -            | 4%         | 3%         | -           |
| 4                  | 2           | 2                      | -              | 1                      | 1     | -              | 2   | -  | 2   | -   | 2          | -              | 1   | -   | -         | 1     | 1          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
|                    | 1%          | 1%                     | -              | 1%                     | 1%    | -              | 1%  | -  | 1%  | -   | 1%         | -              | *   | -   | -         | 5%    | 3%         | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| 5-100              | 13          | 13                     | -              | 4                      | 3     | 4              | 11  | 2  | 11  | 1   | 11         | 1              | 10  | 2   | -         | 4     | 2          | 2              | 1         | -         | -     | -           | -            | 1          | 2          | 1           |
|                    | 3%          | 3%                     | -              | 4%                     | 3%    | 3%             | 3%  | 2%   | 4%  | 1%  | 3%         | 2%             | 4%  | 2%  | -         | 20%   | 6%         | 6%             | 3%        | -         | -     | -           | -            | 2%         | 3%         | 4%          |
| More than 100      | 2           | 2                      | -              | -                      | -     | 2              | -   | 2  | 1   | 1   | 1          | 1              | -   | 2   | -         | -     | -          | -              | -         | 1         | -     | 1           | -            | -          | -          | -           |
|                    | 1%          | 1%                     | -              | -                      | -     | 1%             | -   | 2%   | *   | 1%  | *          | 2%             | -   | 2%  | -         | -     | -          | -              | -         | 4%        | -     | 2%          | -            | -          | -          | -           |
| Don't know/refused | 5           | 5                      | -              | -                      | 2     | 3              | 3   | 2  | 2   | 2   | 3          | 1              | 1   | 4   | 3         | -     | -          | -              | -         | 1         | -     | 1           | -            | -          | -          | -           |
|                    | 1%          | 1%                     | -              | -                      | 2%    | 2%             | 1%  | 2%   | 1%  | 2%  | 1%         | 2%             | *   | 3%  | 8%        | -     | -          | -              | -         | 4%        | -     | 2%          | -            | -          | -          | -           |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

D3. How many people are employed across all of your retail locations?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |            | Region    |           |            |                |           |           |           |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|------------|-----------|-----------|------------|----------------|-----------|-----------|-----------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No         | Scot-land | North     | North West | Yorks & Humber | East Mids | West Mids | Wales     | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    |             |                        |                |                        |           |                |   |                |  |                |   |                |   |            |           |           |            |                |           |           |           |             |              |            |            |             |
| Base               | 400         | 400                    | -              | 108                    | 112       | 160            | 315   | 83             | 290  | 101            | 333   | 62             | 246   | 131        | 39        | 20        | 35         | 36             | 35        | 28        | 23        | 41          | 13           | 47         | 59         | 24          |
| 1                  | 3<br>1%     | 3<br>1%                | -              | -                      | 1<br>1%   | 2<br>1%        | 3<br>1%   | -              | 2<br>1%  | 1<br>1%        | 3<br>1%   | -              | 3<br>1%   | -          | -         | -         | 1<br>3%    | -              | -         | -         | -         | 1<br>2%     | -            | -          | 1<br>2%    | -           |
| 2                  | 7<br>2%     | 7<br>2%                | -              | -                      | 2<br>2%   | 4<br>3%        | -   | 7<br>8%        | -  | 7<br>7%        | -   | 7<br>11%       | 1<br>*  | 6<br>5%    | 3<br>8%   | -         | -          | -              | 1<br>3%   | -         | 1<br>4%   | -           | -            | -          | 2<br>3%    | -           |
| 3                  | 15<br>4%    | 15<br>4%               | -              | 2<br>2%                | 7<br>6%   | 5<br>3%        | 13<br>4%  | 2<br>2%        | 12<br>4%   | 3<br>3%        | 13<br>4%  | 2<br>3%        | 10<br>4%  | 3<br>2%    | 1<br>3%   | -         | 1<br>3%    | 1<br>3%        | 2<br>6%   | 2<br>7%   | 1<br>4%   | 2<br>5%     | -            | 2<br>4%    | 3<br>5%    | -           |
| 4                  | 23<br>6%    | 23<br>6%               | -              | 4<br>4%                | 8<br>7%   | 8<br>5%        | 18<br>6%  | 5<br>6%        | 15<br>5%   | 6<br>6%        | 18<br>5%  | 5<br>8%        | 13<br>5%  | 9<br>7%    | 1<br>3%   | -         | 2<br>6%    | 1<br>3%        | 3<br>9%   | 1<br>4%   | 1<br>4%   | 2<br>5%     | 2<br>15%     | 6<br>13%   | 4<br>7%    | -           |
| 5-100              | 318<br>80%  | 318<br>80%             | -              | 92<br>85%              | 84<br>75% | 127<br>79%     | 253<br>80%  | 63<br>76%      | 236<br>81%   | 76<br>75%      | 270<br>81%  | 44<br>71%      | 199<br>81%  | 102<br>78% | 30<br>77% | 16<br>80% | 24<br>69%  | 30<br>83%      | 27<br>77% | 23<br>82% | 19<br>83% | 33<br>80%   | 11<br>85%    | 38<br>81%  | 46<br>78%  | 21<br>88%   |
| More than 100      | 24<br>6%    | 24<br>6%               | -              | 8<br>7%                | 6<br>5%   | 10<br>6%       | 22<br>7%  | 2<br>2%        | 20<br>7%   | 4<br>4%        | 22<br>7%  | 2<br>3%        | 17<br>7%  | 4<br>3%    | -         | 3<br>15%  | 5<br>14%   | 4<br>11%       | 2<br>6%   | 1<br>4%   | 1<br>4%   | 1<br>2%     | -            | 1<br>2%    | 3<br>5%    | 3<br>13%    |
| Don't know/refused | 10<br>3%    | 10<br>3%               | -              | 2<br>2%                | 4<br>4%   | 4<br>3%        | 6<br>2%   | 4<br>5%        | 5<br>2%  | 4<br>4%        | 7<br>2%   | 2<br>3%        | 3<br>1%   | 7<br>5%    | 4<br>10%  | 1<br>5%   | 2<br>6%    | -              | -         | 1<br>4%   | -         | 2<br>5%     | -            | -          | -          | -           |



## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

D4. Are you a member of any retailer association?

Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315             | 83   | 290             | 101   | 333             | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Yes                | 135         | 135                    | -              | 24                     | 47    | 61             | 86  | 48              | 81   | 52              | 94  | 39              | 86  | 45  | 16        | 3     | 9          | 14             | 11        | 6         | 12    | 14          | 2            | 16         | 28         | 4           |
|                    | 34%         | 34%                    | -              | 22%                    | 42%   | 38%            | 27%   | 58%             | 28%  | 51%             | 28%   | 63%             | 35%   | 34% | 41%       | 15%   | 26%        | 39%            | 31%       | 21%       | 52%   | 34%         | 15%          | 34%        | 47%        | 17%         |
| No                 | 243         | 243                    | -              | 78                     | 58    | 91             | 211   | 32              | 195  | 43              | 220   | 22              | 148   | 78  | 21        | 13    | 24         | 20             | 23        | 21        | 11    | 20          | 11           | 29         | 31         | 19          |
|                    | 61%         | 61%                    | -              | 72%                    | 52%   | 57%            | 67%   | 39%             | 67%  | 43%             | 66%   | 35%             | 60%   | 60% | 54%       | 65%   | 69%        | 56%            | 66%       | 75%       | 48%   | 49%         | 85%          | 62%        | 53%        | 79%         |
| Don't know/refused | 22          | 22                     | -              | 6                      | 7     | 8              | 18  | 3               | 14   | 6               | 19  | 1               | 12  | 8   | 2         | 4     | 2          | 2              | 1         | 1         | -     | 7           | -            | 2          | -          | 1           |
|                    | 6%          | 6%                     | -              | 6%                     | 6%    | 5%             | 6%  | 4%              | 5%   | 6%              | 6%  | 2%              | 5%  | 6%  | 5%        | 20%   | 6%         | 6%             | 3%        | 4%        | -     | 17%         | -            | 4%         | -          | 4%          |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

D5. What association or associations are you a member of?

Base: All members of retailer association

|   | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|---|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|   | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|   |             |                        |                |                        |       |                |   |                |  |                |   |                |   |     |           |       |            |                |           |           |       |             |              |            |            |             |
| Base  | 135         | 135                    | -              | 24                     | 47    | 61             | 86  | 48             | 81   | 52             | 94  | 39             | 86  | 45  | 16        | 3     | 9          | 14             | 11        | 6         | 12    | 14          | 2            | 16         | 28         | 4           |
| PRA - Petrol Retailers Association              | 37          | 37                     | -              | 5                      | 12    | 20             | 29  | 8              | 31   | 6              | 32  | 5              | 26  | 10  | 5         | -     | 3          | 4              | 2         | 1         | 6     | 5           | -            | -          | 11         | -           |
|   | 27%         | 27%                    | -              | 21%                    | 26%   | 33%            | 34%   | 17%            | 38%  | 12%            | 34%   | 13%            | 30%   | 22% | 31%       | -     | 33%        | 29%            | 18%       | 17%       | 50%   | 36%         | -            | -          | 39%        | -           |
| FSB - Federation of Small Businesses            | 17          | 17                     | -              | 3                      | 3     | 11             | 8   | 8              | 8  | 8              | 10  | 6              | 11  | 5   | 3         | -     | 1          | -              | 3         | -         | 1     | 2           | 1            | 2          | 4          | -           |
|   | 13%         | 13%                    | -              | 13%                    | 6%    | 18%            | 9%  | 17%            | 10%  | 15%            | 11%   | 15%            | 13%   | 11% | 19%       | -     | 11%        | -              | 27%       | -         | 8%    | 14%         | 50%          | 13%        | 14%        | -           |
| NFRN - National Federation of Retail Newsagents | 7           | 7                      | -              | 1                      | 1     | 5              | 7   | -              | 7  | -              | 7   | -              | 4   | 3   | 4         | 1     | -          | -              | -         | -         | -     | 2           | -            | -          | -          | -           |
|   | 5%          | 5%                     | -              | 4%                     | 2%    | 8%             | 8%  | -              | 9%   | -              | 7%  | -              | 5%  | 7%  | 25%       | 33%   | -          | -              | -         | -         | -     | -           | 14%          | -          | -          | -           |
| ACS - Association of Convenience Stores         | 6           | 6                      | -              | 1                      | 2     | 3              | 5   | 1              | 5  | 1              | 5   | 1              | 3   | 2   | -         | -     | 1          | 2              | -         | -         | -     | 1           | -            | 1          | 1          | -           |
|   | 4%          | 4%                     | -              | 4%                     | 4%    | 5%             | 6%  | 2%             | 6%   | 2%             | 5%  | 3%             | 3%  | 4%  | -         | -     | 11%        | 14%            | -         | -         | -     | 7%          | -            | 6%         | 4%         | -           |
| NABA - National Asian Business Association      | 1           | 1                      | -              | -                      | -     | 1              | 1   | -              | 1  | -              | 1   | -              | 1   | -   | 1         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
|   | 1%          | 1%                     | -              | -                      | -     | 2%             | 1%  | -              | 1%   | -              | 1%  | -              | 1%  | -   | 6%        | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| SGF - Scottish Grocers Federation               | 1           | 1                      | -              | -                      | -     | 1              | 1   | -              | 1  | -              | 1   | -              | 1   | -   | 1         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
|   | 1%          | 1%                     | -              | -                      | -     | 2%             | 1%  | -              | 1%   | -              | 1%  | -              | 1%  | -   | 6%        | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| LABA - Leicester Asian Business Association     | -           | -                      | -              | -                      | -     | -              | -   | -              | -  | -              | -   | -              | -   | -   | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| RSA - Rural Shops Alliance                      | -           | -                      | -              | -                      | -     | -              | -   | -              | -  | -              | -   | -              | -   | -   | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| BRC - British Retail Consortium                 | -           | -                      | -              | -                      | -     | -              | -   | -              | -  | -              | -   | -              | -   | -   | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| NFSP - National Federation of SubPostmasters    | -           | -                      | -              | -                      | -     | -              | -   | -              | -  | -              | -   | -              | -   | -   | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| Other   | 82          | 82                     | -              | 15                     | 28    | 37             | 44  | 37             | 38   | 43             | 48  | 33             | 47  | 33  | 9         | 2     | 5          | 6              | 7         | 4         | 6     | 9           | 2            | 12         | 19         | 1           |
|   | 61%         | 61%                    | -              | 63%                    | 60%   | 61%            | 51%   | 77%            | 47%  | 83%            | 51%   | 85%            | 55%   | 73% | 56%       | 67%   | 56%        | 43%            | 64%       | 67%       | 50%   | 64%         | 100%         | 75%        | 68%        | 25%         |
| Don't know/refused                              | 14          | 14                     | -              | 3                      | 6     | 4              | 11  | 3              | 11   | 2              | 13  | -              | 11  | 3   | 1         | -     | 1          | 3              | 2         | 1         | -     | 1           | -            | 2          | -          | 3           |
|   | 10%         | 10%                    | -              | 13%                    | 13%   | 7%             | 13%   | 6%             | 14%  | 4%             | 14%   | -              | 13%   | 7%  | 6%        | -     | 11%        | 21%            | 18%       | 17%       | -     | 7%          | -            | 13%        | -          | 75%         |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

RMI1. Are you aware of any commercial services provided by the Retail Motor Industry Federation?

Base: All RMI sample/ PRA members

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                 | Q5. Importance of indirect revenue from tobacco to bottom line |                 | Q4/ Q5. Importance of direct or indirect sales to bottom line |                 | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|-----------------|--|-----------------|---|-----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor -tant   | Not impor -tant | Impor -tant  | Not impor -tant | Impor -tant   | Not impor -tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315             | 83   | 290             | 101   | 333             | 62  | 246 | 131       | 39    | 20         | 35             | 36        | 35        | 28    | 23          | 41           | 13         | 47         | 59          |
| Yes                | 145         | 145                    | -              | 27                     | 43    | 73             | 96  | 48              | 88   | 56              | 104   | 40              | 95  | 45  | 19        | 4     | 8          | 12             | 16        | 6         | 11    | 19          | 5            | 16         | 27         | 2           |
|                    | 36%         | 36%                    | -              | 25%                    | 38%   | 46%            | 30%   | 58%             | 30%  | 55%             | 31%   | 65%             | 39%   | 34% | 49%       | 20%   | 23%        | 33%            | 46%       | 21%       | 48%   | 46%         | 38%          | 34%        | 46%        | 8%          |
| No                 | 246         | 246                    | -              | 79                     | 68    | 82             | 213   | 33              | 197  | 43              | 223   | 21              | 147   | 81  | 17        | 15    | 27         | 23             | 18        | 21        | 12    | 21          | 8            | 30         | 32         | 22          |
|                    | 62%         | 62%                    | -              | 73%                    | 61%   | 51%            | 68%   | 40%             | 68%  | 43%             | 67%   | 34%             | 60%   | 62% | 44%       | 75%   | 77%        | 64%            | 51%       | 75%       | 52%   | 51%         | 62%          | 64%        | 54%        | 92%         |
| Don't know/refused | 9           | 9                      | -              | 2                      | 1     | 5              | 6   | 2               | 5  | 2               | 6   | 1               | 4   | 5   | 3         | 1     | -          | 1              | 1         | 1         | -     | 1           | -            | 1          | -          | -           |
|                    | 2%          | 2%                     | -              | 2%                     | 1%    | 3%             | 2%  | 2%              | 2%   | 2%              | 2%  | 2%              | 2%  | 4%  | 8%        | 5%    | -          | 3%             | 3%        | 4%        | -     | 2%          | -            | 2%         | -          | -           |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

RMI2. Which of their services do you use, if any?

Base: All aware of commercial service from Retail Motor Industry Federation

|                                  | Sample Type |                        |                | Q3. 2012 vs 2011 sales |            |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |            | Region     |          |            |                |            |            |            |             |              |            |            |             |
|----------------------------------|-------------|------------------------|----------------|------------------------|------------|----------------|---|----------------|--|----------------|---|----------------|---|------------|------------|----------|------------|----------------|------------|------------|------------|-------------|--------------|------------|------------|-------------|
|                                  | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower      | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No         | Scot-land  | North    | North West | Yorks & Humber | East Mids  | West Mids  | Wales      | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                                  | Base        | 145                    | 145            | -                      | 27         | 43             | 73  | 96             | 48   | 88             | 56  | 104            | 40  | 95         | 45         | 19       | 4          | 8              | 12         | 16         | 6          | 11          | 19           | 5          | 16         | 27          |
| <b>NET: Any mention</b>          | <b>63</b>   | <b>63</b>              | <b>-</b>       | <b>12</b>              | <b>18</b>  | <b>32</b>      | <b>32</b>   | <b>30</b>      | <b>34</b>  | <b>28</b>      | <b>39</b>   | <b>23</b>      | <b>40</b>   | <b>21</b>  | <b>7</b>   | <b>-</b> | <b>3</b>   | <b>6</b>       | <b>5</b>   | <b>3</b>   | <b>8</b>   | <b>6</b>    | <b>2</b>     | <b>8</b>   | <b>14</b>  | <b>1</b>    |
|                                  | <b>43%</b>  | <b>43%</b>             | <b>-</b>       | <b>44%</b>             | <b>42%</b> | <b>44%</b>     | <b>33%</b>  | <b>63%</b>     | <b>39%</b>   | <b>50%</b>     | <b>38%</b>  | <b>58%</b>     | <b>42%</b>  | <b>47%</b> | <b>37%</b> | <b>-</b> | <b>38%</b> | <b>50%</b>     | <b>31%</b> | <b>50%</b> | <b>73%</b> | <b>32%</b>  | <b>40%</b>   | <b>50%</b> | <b>52%</b> | <b>50%</b>  |
| Insurance                        | 13          | 13                     | -              | 3                      | 4          | 6              | 10  | 3              | 9  | 4              | 11  | 2              | 8   | 4          | 2          | -        | 1          | 1              | -          | 2          | 1          | 3           | 1            | -          | 2          | -           |
|                                  | 9%          | 9%                     | -              | 11%                    | 9%         | 8%             | 10%   | 6%             | 10%  | 7%             | 11%   | 5%             | 8%  | 9%         | 11%        | -        | 13%        | 8%             | -          | 33%        | 9%         | 16%         | 20%          | -          | 7%         | -           |
| Banking                          | 8           | 8                      | -              | 2                      | -          | 6              | 5   | 3              | 5  | 3              | 6   | 2              | 5   | 2          | -          | -        | 2          | 1              | -          | -          | -          | 2           | 1            | -          | 2          | -           |
|                                  | 6%          | 6%                     | -              | 7%                     | -          | 8%             | 5%  | 6%             | 6%   | 5%             | 6%  | 5%             | 5%  | 4%         | -          | -        | 25%        | 8%             | -          | -          | -          | 11%         | 20%          | -          | 7%         | -           |
| Telecoms                         | 6           | 6                      | -              | 2                      | 1          | 3              | 5   | 1              | 4  | 2              | 5   | 1              | 5   | 1          | 1          | -        | 1          | 1              | -          | -          | -          | 1           | -            | -          | 2          | -           |
|                                  | 4%          | 4%                     | -              | 7%                     | 2%         | 4%             | 5%  | 2%             | 5%   | 4%             | 5%  | 3%             | 5%  | 2%         | 5%         | -        | 13%        | 8%             | -          | -          | -          | 5%          | -            | -          | 7%         | -           |
| Card processing                  | 4           | 4                      | -              | 3                      | 1          | -              | 2   | 2              | 1  | 3              | 2   | 2              | 1   | 2          | -          | -        | -          | -              | -          | -          | 1          | -           | 1            | 2          | -          | -           |
|                                  | 3%          | 3%                     | -              | 11%                    | 2%         | -              | 2%  | 4%             | 1%   | 5%             | 2%  | 5%             | 1%  | 4%         | -          | -        | -          | -              | -          | -          | 9%         | -           | 20%          | 13%        | -          | -           |
| Petrol maintenance and pumps     | 4           | 4                      | -              | -                      | -          | 4              | 2   | 2              | 2  | 2              | 2   | 2              | 3   | 1          | 1          | -        | -          | -              | -          | -          | 1          | 1           | -            | 1          | -          | -           |
|                                  | 3%          | 3%                     | -              | -                      | -          | 5%             | 2%  | 4%             | 2%   | 4%             | 2%  | 5%             | 3%  | 2%         | 5%         | -        | -          | -              | -          | -          | 9%         | 5%          | -            | 6%         | -          | -           |
| Petrol card processing           | 3           | 3                      | -              | 1                      | 1          | 1              | 3   | -              | 2  | 1              | 3   | -              | 1   | 1          | -          | -        | -          | -              | -          | -          | -          | 1           | 1            | -          | 1          | -           |
|                                  | 2%          | 2%                     | -              | 4%                     | 2%         | 1%             | 3%  | -              | 2%   | 2%             | 3%  | -              | 1%  | 2%         | -          | -        | -          | -              | -          | -          | -          | 5%          | 20%          | -          | 4%         | -           |
| Car warranty                     | 3           | 3                      | -              | 1                      | 2          | -              | 1   | 2              | 1  | 2              | 2   | 1              | 1   | 1          | -          | -        | -          | -              | 1          | -          | 1          | -           | 1            | -          | -          | -           |
|                                  | 2%          | 2%                     | -              | 4%                     | 5%         | -              | 1%  | 4%             | 1%   | 4%             | 2%  | 3%             | 1%  | 2%         | -          | -        | -          | -              | 6%         | -          | 9%         | -           | 20%          | -          | -          | -           |
| Oils and lubricants              | 3           | 3                      | -              | 2                      | -          | 1              | 2   | 1              | -  | 3              | 2   | 1              | 1   | 1          | -          | -        | -          | -              | -          | -          | 1          | -           | 1            | 1          | -          | -           |
|                                  | 2%          | 2%                     | -              | 7%                     | -          | 1%             | 2%  | 2%             | -  | 5%             | 2%  | 3%             | 1%  | 2%         | -          | -        | -          | -              | -          | -          | 9%         | -           | 20%          | 6%         | -          | -           |
| PCI/DSS compliance               | 2           | 2                      | -              | 1                      | -          | 1              | 1   | 1              | -  | 2              | 1   | 1              | 1   | -          | -          | -        | -          | -              | -          | -          | -          | -           | 1            | 1          | -          | -           |
|                                  | 1%          | 1%                     | -              | 4%                     | -          | 1%             | 1%  | 2%             | -  | 4%             | 1%  | 3%             | 1%  | -          | -          | -        | -          | -              | -          | -          | -          | -           | 20%          | 6%         | -          | -           |
| Waste collection                 | 2           | 2                      | -              | 1                      | -          | 1              | 2   | -              | 1  | 1              | 2   | -              | 1   | -          | -          | -        | -          | -              | -          | -          | -          | -           | 1            | 1          | -          | -           |
|                                  | 1%          | 1%                     | -              | 4%                     | -          | 1%             | 2%  | -              | 1%   | 2%             | 2%  | -              | 1%  | -          | -          | -        | -          | -              | -          | -          | -          | -           | 20%          | 6%         | -          | -           |
| Business stationery and supplies | 2           | 2                      | -              | -                      | 1          | 1              | 2   | -              | 1  | 1              | 2   | -              | 2   | -          | -          | -        | -          | 1              | -          | -          | -          | -           | -            | 1          | -          | -           |
|                                  | 1%          | 1%                     | -              | -                      | 2%         | 1%             | 2%  | -              | 1%   | 2%             | 2%  | -              | 2%  | -          | -          | -        | -          | 8%             | -          | -          | -          | -           | -            | 6%         | -          | -           |
| Health insurance                 | 1           | 1                      | -              | 1                      | -          | -              | 1   | -              | -  | 1              | 1   | -              | -   | -          | -          | -        | -          | -              | -          | -          | -          | -           | 1            | -          | -          | -           |
|                                  | 1%          | 1%                     | -              | 4%                     | -          | -              | 1%  | -              | -  | 2%             | 1%  | -              | -   | -          | -          | -        | -          | -              | -          | -          | -          | -           | 20%          | -          | -          | -           |
| Autodata                         | 1           | 1                      | -              | 1                      | -          | -              | 1   | -              | -  | 1              | 1   | -              | -   | -          | -          | -        | -          | -              | -          | -          | -          | -           | 1            | -          | -          | -           |
|                                  | 1%          | 1%                     | -              | 4%                     | -          | -              | 1%  | -              | -  | 2%             | 1%  | -              | -   | -          | -          | -        | -          | -              | -          | -          | -          | -           | 20%          | -          | -          | -           |
| DMS systems                      | 1           | 1                      | -              | -                      | 1          | -              | 1   | -              | 1  | -              | 1   | -              | 1   | -          | -          | -        | -          | -              | -          | -          | -          | -           | -            | -          | 1          | -           |
|                                  | 1%          | 1%                     | -              | -                      | 2%         | -              | 1%  | -              | 1%   | -              | 1%  | -              | 1%  | -          | -          | -        | -          | -              | -          | -          | -          | -           | -            | -          | 4%         | -           |
| Debt recovery                    | -           | -                      | -              | -                      | -          | -              | -   | -              | -  | -              | -   | -              | -   | -          | -          | -        | -          | -              | -          | -          | -          | -           | -            | -          | -          | -           |
|                                  | -           | -                      | -              | -                      | -          | -              | -   | -              | -  | -              | -   | -              | -   | -          | -          | -        | -          | -              | -          | -          | -          | -           | -            | -          | -          | -           |
| Other                            | 38          | 38                     | -              | 7                      | 10         | 20             | 17  | 20             | 20   | 17             | 22  | 15             | 23  | 14         | 5          | -        | 2          | 4              | 4          | 1          | 3          | 3           | 1            | 3          | 11         | 1           |
|                                  | 26%         | 26%                    | -              | 26%                    | 23%        | 27%            | 18%   | 42%            | 23%  | 30%            | 21%   | 38%            | 24%   | 31%        | 26%        | -        | 25%        | 33%            | 25%        | 17%        | 27%        | 16%         | 20%          | 19%        | 41%        | 50%         |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

RMI2. Which of their services do you use, if any?

Base: All aware of commercial service from Retail Motor Industry Federation

|                                 | Sample Type |                        |                | Q3. 2012 vs 2011 sales |           |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |           | Region    |          |            |                |           |           |          |             |              |            |            |             |
|---------------------------------|-------------|------------------------|----------------|------------------------|-----------|----------------|---|----------------|--|----------------|---|----------------|---|-----------|-----------|----------|------------|----------------|-----------|-----------|----------|-------------|--------------|------------|------------|-------------|
|                                 | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower     | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No        | Scot-land | North    | North West | Yorks & Humber | East Mids | West Mids | Wales    | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                                 | Base        | 145                    | 145            | -                      | 27        | 43             | 73  | 96             | 48   | 88             | 56  | 104            | 40  | 95        | 45        | 19       | 4          | 8              | 12        | 16        | 6        | 11          | 19           | 5          | 16         | 27          |
| Don't use any of their services | 53<br>37%   | 53<br>37%              | -              | 10<br>37%              | 19<br>44% | 23<br>32%      | 43<br>45%   | 10<br>21%      | 36<br>41%  | 17<br>30%      | 43<br>41%   | 10<br>25%      | 36<br>38%   | 15<br>33% | 8<br>42%  | 3<br>75% | 3<br>38%   | 4<br>33%       | 6<br>38%  | 3<br>50%  | 3<br>27% | 7<br>37%    | 3<br>60%     | 5<br>31%   | 8<br>30%   | -           |
| Don't know/refused              | 29<br>20%   | 29<br>20%              | -              | 5<br>19%               | 6<br>14%  | 18<br>25%      | 21<br>22%   | 8<br>17%       | 18<br>20%  | 11<br>20%      | 22<br>21%   | 7<br>18%       | 19<br>20%   | 9<br>20%  | 4<br>21%  | 1<br>25% | 2<br>25%   | 2<br>17%       | 5<br>31%  | -         | -        | 6<br>32%    | -            | 3<br>19%   | 5<br>19%   | 1<br>50%    |
| Mean mentions                   | 0.6         | 0.6                    | -              | 0.9                    | 0.5       | 0.6            | 0.6   | 0.7            | 0.5  | 0.8            | 0.6   | 0.7            | 0.6   | 0.6       | 0.5       | 0.0      | 0.8        | 0.7            | 0.3       | 0.5       | 0.7      | 0.6         | 2.2          | 0.6        | 0.7        | 0.5         |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

RMI3a. Which of the following best describes your business?

Base: All respondents

|                         | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|-------------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                         | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                         |             |                        |                |                        |       |                |   |                |  |                |   |                |   |     |           |       |            |                |           |           |       |             |              |            |            |             |
| Base                    | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83             | 290  | 101            | 333   | 62             | 246   | 131 | 39        | 20    | 35         | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |
| Petrol retailer         | 379         | 379                    | -              | 102                    | 108   | 150            | 309   | 69             | 285  | 86             | 327   | 48             | 242   | 114 | 31        | 20    | 35         | 36             | 34        | 26        | 22    | 40          | 12           | 45         | 57         | 21          |
|                         | 95%         | 95%                    | -              | 94%                    | 96%   | 94%            | 98%   | 83%            | 98%  | 85%            | 98%   | 77%            | 98%   | 87% | 79%       | 100%  | 100%       | 100%           | 97%       | 93%       | 96%   | 98%         | 92%          | 96%        | 97%        | 88%         |
| Confectioner            | 330         | 330                    | -              | 92                     | 89    | 130            | 280   | 49             | 256  | 67             | 295   | 32             | 214   | 95  | 27        | 18    | 28         | 33             | 27        | 24        | 19    | 37          | 10           | 38         | 50         | 19          |
|                         | 83%         | 83%                    | -              | 85%                    | 79%   | 81%            | 89%   | 59%            | 88%  | 66%            | 89%   | 52%            | 87%   | 73% | 69%       | 90%   | 80%        | 92%            | 77%       | 86%       | 83%   | 90%         | 77%          | 81%        | 85%        | 79%         |
| Tobacconist             | 318         | 318                    | -              | 89                     | 84    | 127            | 274   | 43             | 252  | 59             | 289   | 26             | 212   | 85  | 23        | 17    | 27         | 31             | 27        | 24        | 19    | 37          | 9            | 36         | 49         | 19          |
|                         | 80%         | 80%                    | -              | 82%                    | 75%   | 79%            | 87%   | 52%            | 87%  | 58%            | 87%   | 42%            | 86%   | 65% | 59%       | 85%   | 77%        | 86%            | 77%       | 86%       | 83%   | 90%         | 69%          | 77%        | 83%        | 79%         |
| Other beverage retailer | 304         | 304                    | -              | 83                     | 84    | 121            | 258   | 45             | 233  | 65             | 271   | 30             | 195   | 88  | 27        | 17    | 25         | 28             | 25        | 22        | 17    | 35          | 8            | 33         | 50         | 17          |
|                         | 76%         | 76%                    | -              | 77%                    | 75%   | 76%            | 82%   | 54%            | 80%  | 64%            | 81%   | 48%            | 79%   | 67% | 69%       | 85%   | 71%        | 78%            | 71%       | 79%       | 74%   | 85%         | 62%          | 70%        | 85%        | 71%         |
| Food retailer           | 300         | 300                    | -              | 82                     | 76    | 125            | 253   | 46             | 235  | 58             | 268   | 29             | 193   | 90  | 23        | 17    | 26         | 27             | 22        | 24        | 17    | 34          | 8            | 35         | 48         | 19          |
|                         | 75%         | 75%                    | -              | 76%                    | 68%   | 78%            | 80%   | 55%            | 81%  | 57%            | 80%   | 47%            | 78%   | 69% | 59%       | 85%   | 74%        | 75%            | 80%       | 86%       | 74%   | 83%         | 62%          | 74%        | 81%        | 79%         |
| Newsagent               | 293         | 293                    | -              | 85                     | 72    | 119            | 258   | 34             | 240  | 47             | 271   | 19             | 189   | 84  | 21        | 16    | 27         | 30             | 23        | 22        | 16    | 32          | 8            | 33         | 46         | 19          |
|                         | 73%         | 73%                    | -              | 79%                    | 64%   | 74%            | 82%   | 41%            | 83%  | 47%            | 81%   | 31%            | 77%   | 64% | 54%       | 80%   | 77%        | 83%            | 66%       | 79%       | 70%   | 78%         | 62%          | 70%        | 78%        | 79%         |
| Alcohol retailer        | 210         | 210                    | -              | 57                     | 53    | 88             | 189   | 20             | 171  | 33             | 197   | 11             | 139   | 58  | 10        | 12    | 20         | 22             | 20        | 20        | 11    | 28          | 6            | 26         | 35         | -           |
|                         | 53%         | 53%                    | -              | 53%                    | 47%   | 55%            | 60%   | 24%            | 59%  | 33%            | 59%   | 18%            | 57%   | 44% | 26%       | 60%   | 57%        | 61%            | 57%       | 71%       | 48%   | 68%         | 46%          | 55%        | 59%        | -           |
| Other retailer          | 78          | 78                     | -              | 20                     | 15    | 39             | 54  | 23             | 45   | 32             | 55  | 22             | 35  | 39  | 16        | 4     | 4          | 3              | 5         | 3         | 4     | 11          | 3            | 8          | 10         | 7           |
|                         | 20%         | 20%                    | -              | 19%                    | 13%   | 24%            | 17%   | 28%            | 16%  | 32%            | 17%   | 35%            | 14%   | 30% | 41%       | 20%   | 11%        | 8%             | 14%       | 11%       | 17%   | 27%         | 23%          | 17%        | 17%        | 29%         |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI

RMI3b. Is the RMI's petrol forecourt-related support your main reason for joining the Association?

Base: All RMI sample/ PRA members

|                     | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line | Q5. Importance of indirect revenue from tobacco to bottom line | Q4/ Q5. Importance of direct or indirect sales to bottom line | Q9. Believe illicit trade in tobacco has impact on business |            | Region         |     |     |           |       |            |                |           |           |       |             |              |            |            |             |
|---------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|--|---|---|------------|----------------|-----|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                     | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant   | Impor-tant  | Not impor-tant  | Impor-tant | Not impor-tant | Yes | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                     |             |                        |                |                        |       |                |   |  |   |   |            |                |     |     |           |       |            |                |           |           |       |             |              |            |            |             |
| Base                | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83   | 290   | 101   | 333        | 62             | 246 | 131 | 39        | 20    | 35         | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |
| Yes                 | 145         | 145                    | -              | 36                     | 43    | 62             | 114   | 31   | 108   | 36  | 124        | 21             | 99  | 41  | 13        | 8     | 13         | 17             | 14        | 9         | 11    | 16          | 4            | 14         | 23         | 3           |
|                     | 36%         | 36%                    | -              | 33%                    | 38%   | 39%            | 36%   | 37%  | 37%   | 36%   | 37%        | 34%            | 40% | 31% | 33%       | 40%   | 37%        | 47%            | 40%       | 32%       | 48%   | 39%         | 31%          | 30%        | 39%        | 13%         |
| No                  | 75          | 75                     | -              | 18                     | 19    | 36             | 46  | 27   | 43  | 30  | 48         | 25             | 42  | 28  | 7         | 2     | 6          | 4              | 7         | 4         | 6     | 8           | 4            | 13         | 10         | 4           |
|                     | 19%         | 19%                    | -              | 17%                    | 17%   | 23%            | 15%   | 33%  | 15%   | 30%   | 14%        | 40%            | 17% | 21% | 18%       | 10%   | 17%        | 11%            | 20%       | 14%       | 26%   | 20%         | 31%          | 28%        | 17%        | 17%         |
| Not a member of RMI | 103         | 103                    | -              | 31                     | 32    | 31             | 91  | 12   | 86  | 14  | 93         | 9              | 69  | 27  | 12        | 3     | 9          | 11             | 11        | 9         | 3     | 6           | 4            | 14         | 16         | 5           |
|                     | 26%         | 26%                    | -              | 29%                    | 29%   | 19%            | 29%   | 14%  | 30%   | 14%   | 28%        | 15%            | 28% | 21% | 31%       | 15%   | 26%        | 31%            | 31%       | 32%       | 13%   | 15%         | 31%          | 30%        | 27%        | 21%         |
| Don't know/refused  | 77          | 77                     | -              | 23                     | 18    | 31             | 64  | 13   | 53  | 21  | 68         | 7              | 36  | 35  | 7         | 7     | 7          | 4              | 3         | 6         | 3     | 11          | 1            | 6          | 10         | 12          |
|                     | 19%         | 19%                    | -              | 21%                    | 16%   | 19%            | 20%   | 16%  | 18%   | 21%   | 20%        | 11%            | 15% | 27% | 18%       | 35%   | 20%        | 11%            | 9%        | 21%       | 13%   | 27%         | 8%           | 13%        | 17%        | 50%         |

## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI  
Region  
Base: All respondents

|                    | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                | Q5. Importance of indirect revenue from tobacco to bottom line |                | Q4/ Q5. Importance of direct or indirect sales to bottom line |                | Q9. Believe illicit trade in tobacco has impact on business |     | Region    |       |            |                |           |           |       |             |              |            |            |             |
|--------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|----------------|--|----------------|---|----------------|---|-----|-----------|-------|------------|----------------|-----------|-----------|-------|-------------|--------------|------------|------------|-------------|
|                    | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-tant  | Not impor-tant | Impor-tant   | Not impor-tant | Impor-tant  | Not impor-tant | Yes   | No  | Scot-land | North | North West | Yorks & Humber | East Mids | West Mids | Wales | East Anglia | Grter London | South East | South West | Nrt Ireland |
|                    |             |                        |                |                        |       |                |   |                |  |                |   |                |   |     |           |       |            |                |           |           |       |             |              |            |            |             |
| Base               | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83             | 290  | 101            | 333   | 62             | 246   | 131 | 39        | 20    | 35         | 36             | 35        | 28        | 23    | 41          | 13           | 47         | 59         | 24          |
| Scotland           | 39          | 39                     | -              | 5                      | 15    | 16             | 24  | 14             | 24   | 13             | 26  | 11             | 18  | 21  | 39        | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
|                    | 10%         | 10%                    | -              | 5%                     | 13%   | 10%            | 8%  | 17%            | 8%   | 13%            | 8%  | 18%            | 7%  | 16% | 100%      | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| North              | 20          | 20                     | -              | 8                      | 5     | 7              | 17  | 3              | 15   | 5              | 17  | 3              | 15  | 5   | -         | 20    | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
|                    | 5%          | 5%                     | -              | 7%                     | 4%    | 4%             | 5%  | 4%             | 5%   | 5%             | 5%  | 5%             | 6%  | 4%  | -         | 100%  | -          | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| North West         | 35          | 35                     | -              | 11                     | 7     | 16             | 32  | 3              | 29   | 6              | 33  | 2              | 23  | 10  | -         | -     | 35         | -              | -         | -         | -     | -           | -            | -          | -          | -           |
|                    | 9%          | 9%                     | -              | 10%                    | 6%    | 10%            | 10%   | 4%             | 10%  | 6%             | 10%   | 3%             | 9%  | 8%  | -         | -     | 100%       | -              | -         | -         | -     | -           | -            | -          | -          | -           |
| Yorks & Humberside | 36          | 36                     | -              | 14                     | 13    | 8              | 32  | 3              | 31   | 3              | 32  | 2              | 24  | 8   | -         | -     | -          | 36             | -         | -         | -     | -           | -            | -          | -          | -           |
|                    | 9%          | 9%                     | -              | 13%                    | 12%   | 5%             | 10%   | 4%             | 11%  | 3%             | 10%   | 3%             | 10%   | 6%  | -         | -     | -          | 100%           | -         | -         | -     | -           | -            | -          | -          | -           |
| East Midlands      | 35          | 35                     | -              | 9                      | 10    | 15             | 30  | 5              | 29   | 6              | 33  | 2              | 25  | 8   | -         | -     | -          | -              | 35        | -         | -     | -           | -            | -          | -          | -           |
|                    | 9%          | 9%                     | -              | 8%                     | 9%    | 9%             | 10%   | 6%             | 10%  | 6%             | 10%   | 3%             | 10%   | 6%  | -         | -     | -          | -              | 100%      | -         | -     | -           | -            | -          | -          | -           |
| West Midlands      | 28          | 28                     | -              | 9                      | 8     | 10             | 24  | 4              | 20   | 6              | 26  | 2              | 18  | 7   | -         | -     | -          | -              | -         | 28        | -     | -           | -            | -          | -          | -           |
|                    | 7%          | 7%                     | -              | 8%                     | 7%    | 6%             | 8%  | 5%             | 7%   | 6%             | 8%  | 3%             | 7%  | 5%  | -         | -     | -          | -              | -         | 100%      | -     | -           | -            | -          | -          | -           |
| Wales              | 23          | 23                     | -              | 4                      | 6     | 12             | 15  | 8              | 14   | 9              | 17  | 6              | 17  | 6   | -         | -     | -          | -              | -         | -         | 23    | -           | -            | -          | -          | -           |
|                    | 6%          | 6%                     | -              | 4%                     | 5%    | 8%             | 5%  | 10%            | 5%   | 9%             | 5%  | 10%            | 7%  | 5%  | -         | -     | -          | -              | -         | -         | 100%  | -           | -            | -          | -          | -           |
| East Anglia        | 41          | 41                     | -              | 9                      | 11    | 19             | 33  | 8              | 28   | 13             | 34  | 7              | 23  | 16  | -         | -     | -          | -              | -         | -         | -     | 41          | -            | -          | -          | -           |
|                    | 10%         | 10%                    | -              | 8%                     | 10%   | 12%            | 10%   | 10%            | 10%  | 13%            | 10%   | 11%            | 9%  | 12% | -         | -     | -          | -              | -         | -         | -     | 100%        | -            | -          | -          | -           |
| Greater London     | 13          | 13                     | -              | 3                      | 4     | 5              | 12  | 1              | 10   | 3              | 12  | 1              | 7   | 4   | -         | -     | -          | -              | -         | -         | -     | -           | 13           | -          | -          | -           |
|                    | 3%          | 3%                     | -              | 3%                     | 4%    | 3%             | 4%  | 1%             | 3%   | 3%             | 4%  | 2%             | 3%  | 3%  | -         | -     | -          | -              | -         | -         | -     | -           | 100%         | -          | -          | -           |
| South East         | 47          | 47                     | -              | 10                     | 11    | 21             | 35  | 12             | 35   | 12             | 38  | 9              | 25  | 16  | -         | -     | -          | -              | -         | -         | -     | -           | -            | 47         | -          | -           |
|                    | 12%         | 12%                    | -              | 9%                     | 10%   | 13%            | 11%   | 14%            | 12%  | 12%            | 11%   | 15%            | 10%   | 12% | -         | -     | -          | -              | -         | -         | -     | -           | -            | 100%       | -          | -           |
| South West         | 59          | 59                     | -              | 13                     | 18    | 24             | 42  | 17             | 33   | 24             | 43  | 16             | 38  | 20  | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | 59         | -           |
|                    | 15%         | 15%                    | -              | 12%                    | 16%   | 15%            | 13%   | 20%            | 11%  | 24%            | 13%   | 26%            | 15%   | 15% | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | 100%       | -           |
| Northern Ireland   | 24          | 24                     | -              | 13                     | 4     | 7              | 19  | 5              | 22   | 1              | 22  | 1              | 13  | 10  | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | 24          |
|                    | 6%          | 6%                     | -              | 12%                    | 4%    | 4%             | 6%  | 6%             | 8%   | 1%             | 7%  | 2%             | 5%  | 8%  | -         | -     | -          | -              | -         | -         | -     | -           | -            | -          | -          | 100%        |



## UK Retailers Survey

### CATI Fieldwork : 4th September - 5th November 2012

Absolutes/col percents

Sample: RMI  
Sample type  
Base: All respondents

|                        | Sample Type |                        |                | Q3. 2012 vs 2011 sales |       |                | Q4. Importance of direct tobacco sales to bottom line |                     | Q5. Importance of indirect revenue from tobacco to bottom line |                     | Q4/ Q5. Importance of direct or indirect sales to bottom line |                     | Q9. Believe illicit trade in tobacco has impact on business |      | Region        |       |               |                      |              |              |       |                |                 |               |               |                |
|------------------------|-------------|------------------------|----------------|------------------------|-------|----------------|---|---------------------|--|---------------------|---|---------------------|---|------|---------------|-------|---------------|----------------------|--------------|--------------|-------|----------------|-----------------|---------------|---------------|----------------|
|                        | Total       | Petrol Retailer Sample | Populus Sample | Higher                 | Lower | About the same | Impor-<br>-tant                                       | Not impor-<br>-tant | Impor-<br>-tant  | Not impor-<br>-tant | Impor-<br>-tant   | Not impor-<br>-tant | Yes   | No   | Scot-<br>land | North | North<br>West | Yorks<br>&<br>Humber | East<br>Mids | West<br>Mids | Wales | East<br>Anqlia | Grter<br>London | South<br>East | South<br>West | Nrt<br>Ireland |
|                        | Base        | 400                    | 400            | -                      | 108   | 112            | 160   | 315                 | 83   | 290                 | 101   | 333                 | 62  | 246  | 131           | 39    | 20            | 35                   | 36           | 35           | 28    | 23             | 41              | 13            | 47            | 59             |
| Petrol Retailer Sample | 400         | 400                    | -              | 108                    | 112   | 160            | 315   | 83                  | 290  | 101                 | 333   | 62                  | 246   | 131  | 39            | 20    | 35            | 36                   | 35           | 28           | 23    | 41             | 13              | 47            | 59            | 24             |
|                        | 100%        | 100%                   | -              | 100%                   | 100%  | 100%           | 100%  | 100%                | 100%   | 100%                | 100%  | 100%                | 100%  | 100% | 100%          | 100%  | 100%          | 100%                 | 100%         | 100%         | 100%  | 100%           | 100%            | 100%          | 100%          | 100%           |
| Populus Sample         | -           | -                      | -              | -                      | -     | -              | -   | -                   | -  | -                   | -   | -                   | -   | -    | -             | -     | -             | -                    | -            | -            | -     | -              | -               | -             | -             | -              |