

Objective

- Apply a refined survey methodology that interviews smokers about their cigarette purchases and carefully inspects their cigarette packs for indications of illegal origins.



Retail Price required on all cigarette packs intended for sale in Poland

Descriptors such as "Lights", "Ultra Lights", "Low Tar" are forbidden by law

Differentiating Legal and Illegal Cigarette Packs



Excise Tax Stamp issued by the Ministry of Finance of the Republic of Poland



Two Alternate Health Warning Labels on Front and Back Panels of Pack Must cover at least 30% of front and 40% of back panel. 14 formats in total.

Palace tytoniu umierają młodzi	Palenie tytoniu zamyka naczynia krwionośne i jest przyczyną zawałów serca i udarów mózgu	Palenie tytoniu powoduje śmiertelny raka płuc	Palenie tytoniu w czasie ciąży szkodzi Twojemu dziecku	Palenie tytoniu może spowodować poważny i bolesny smierć	Dzwonic pod nr telefonu: 0 801 108 108 uzyskasz pomoc w rzuceniu palenia
Chrońcie dzieci - nie zmuszajcie ich do wyciągnięcia dymu tytoniowego	Twój lekarz lub farmaceuta pomoże Ci rzucić palenie	Palenie tytoniu silnie uzależnia - nie zaczynaj palić	Zaprzestanie palenia zmniejsza ryzyko grzyźnych chorób serca i płuc	Palenie tytoniu może spowodować nasilenie i zmniejszenie płodności	Dym tytoniowy zawiera barzen, nitrozoaminy, farmidehyd i cyjanowodór
sub. smolisty: 10 mg/papieros; nikotyna: 1.0 mg/papieros; tlenek węgla: 10 mg/papieros	Palenie tytoniu może zmniejszyć przepływ krwi i powodować impotencję	Palenie tytoniu przyspiesza starzenie się skóry			

Tar, Nicotine and Carbon Monoxide Label

Methods

- Collection of individual-level data through the insertion of 7 questions into an omnibus survey, administered face-to-face to a nationally representative sample, ages 15+.

The Survey Instrument

Part I: Identification of Smokers and Smuggled Cigarette Packs

1. Currently, how often do you smoke cigarettes?
 A = Every day. Move to Q2.
 B = Less than Every day/Occasionally. Move to Q1a.
 C = I am an ex-smoker. Move to Q2.
 D = I never smoked cigarettes. Move to "Survey Instructions"

1a. Please recall the last 30 days, during how many of those days did you smoke cigarettes?
 A = I did not smoke during the past 30 days. Move to Q2.
 B = I smoked for ___ days during the past 30 days. Move to Q2.
 2. How many cigarettes per day do you smoke on average? ___ (If Q1-A or B)
 3. How many cigarettes per day did you smoke on average? ___ (If Q1-C)

Survey Instructions
 *ASK respondent to show a cigarette pack which the respondent is currently smoking/hat at home. If respondent does not smoke, ask for a pack of cigarettes belonging to another member of the household.
 A respondent's pack was shown.
 B The pack of another member of the household was shown.
 C A pack of cigarettes was not shown.

3. Where did you buy this pack of cigarettes?
 3. Where was this pack of cigarettes purchased?
 3. Where did you usually purchase your cigarette packs?
 **ASK if respondent's pack was shown & he/she is a smoker (code A, B in Q1).
 **ASK if the pack of cigarettes does not belong to the respondent.
 **ASK if pack of cigarettes not shown and respondent=smoker (code c in Q1).

A. Gas Station
 B. Hypermarket
 C. Grocery store/Deli
 D. Tobacco Shop
 E. Newsstand/Kiosk
 F. Marketplace (stationary stand/fixed seller)
 G. Street seller (mobile seller)
 H. Over the Internet
 I. Wholesaler
 J. "Black market"
 K. Other

4. How much did you pay for this pack of cigarettes that you purchased? ___ zł ___ gr. **ASK if respondent pack shown & code A, B in Q1.
 4. How much did you usually pay for a pack of cigarettes? ___ zł ___ gr. **ASK if pack not shown & code A, B in Q1.
 4. Do you know the purchase price of the pack of cigarettes shown? ___ zł ___ gr. **ASK if pack shown does not belong to the respondent.
 4. How much did you usually pay for a pack of cigarettes? ___ zł ___ gr. **ASK if pack not shown & code c in Q1.

**ASK if codes A or B in instructions. Based on pack shown (respondent's or someone else from the household) answer questions 5.6 and 7.

5a. Brand: Select from list
 Bb. Length:
 A. Short (70mm)
 B. Regular ("KS" 85mm)
 C. Long (100+ 100mm)
 D. Other. Specify: _____

5c. With filter?:
 A. Yes
 B. No

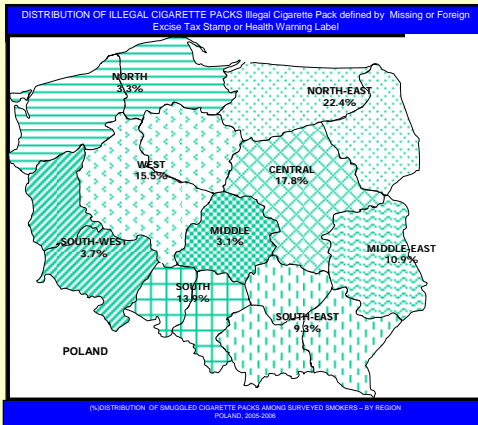
5d. Type of Cigarette
 A. Light
 B. Super light
 C. Menthol
 D. Full flavor (regular)
 E. Other. Specify: _____

5f. Pack-type:
 A. Soft
 B. Hard
 5g. How many cigarettes were in each pack?
 A. 20
 B. 25
 C. 40
 D. 25
 E. Other
 F. I do not know.

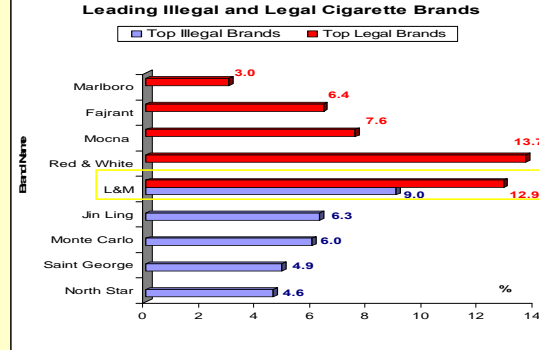
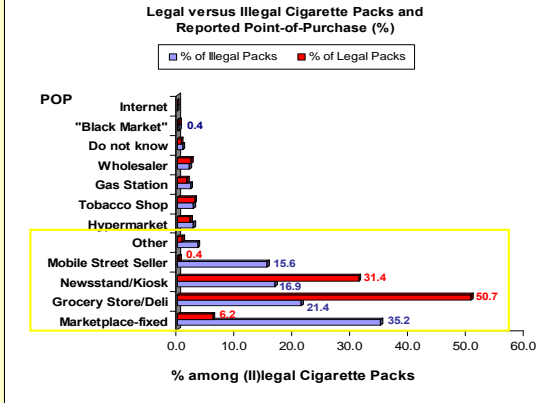
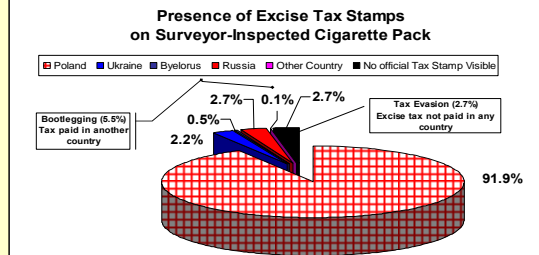
6. On the cigarette pack shown, there is a tobacco tax stamp issued by the Ministry of Finance of:
 A. Poland
 B. The Ukraine
 C. Byelorussia
 D. Russia
 E. The Czech Republic
 F. Slovakia
 G. Other country: _____

7. Is Polish health warning and/or tar and nicotine label present on the pack?
 A. No, neither is visible
 B. Yes, both are present but in a language other than Polish
 C. Yes, a health warning label is present but in language other than Polish
 D. Yes, a tar and nicotine label is present but in language other than Polish
 E. Yes, both are present and in Polish
 F. Yes, a health warning label in Polish is present
 G. Yes, a tar and nicotine label in Polish is present

Descriptive Results



	Full Sample	All Smokers	Smokers with Legal Packs	Smokers with Illegal Packs
Gender (%)				
Male	47.8	59.7	59.7	57.2
Female	52.2	40.3	40.3	42.8
Age (%)				
<18	3.6	0.2	0.3	0.0
18-29	24.2	23.4	21.0	15.4
30-39	16.1	19.4	19.3	18.0
40-49	18.3	26.7	28.0	25.4
50-59	16.4	20.5	21.2	21.2
60-69	6.4	4.7	5.2	8.2
>=70	15.1	5.0	5.2	11.7
Net Household Income (%)				
<399.99 PLN	12.2	14.8	14.4	20.6
800.00-1499.99 PLN	27.8	28.3	27.2	32.2
1500.00-2499.99 PLN	32.8	30.2	29.8	27.1
2500.00-3999.99 PLN	21.0	20.8	22.2	15.5
>=4000.00 PLN	6.1	5.9	6.5	4.5
Educational Attainment (%)				
Elementary	25.5	20.9	20.1	37.6
Vocational/Trade	29.6	41.5	42.6	36.2
High School	34.5	31.0	30.8	20.9
University	10.4	6.6	6.5	5.3
Occupation (%)				
Specialist/Entrepreneur/Management	5.3	5.3	6.3	3.5
Qualified White Collar Worker	9.7	9.7	7.8	5.5
Nonqualified White Collar Worker	5.7	5.7	5.4	7.1
Qualified Blue Collar Worker	23.5	23.5	37.5	28.7
Nonqualified Blue Collar Worker	5.9	5.9	8.7	7.9
Farmer	10.9	10.9	7.1	15.6
Housewife	3.8	3.8	3.4	4.9
Student	11.1	11.1	4.7	1.1
Retiree/Unemployed/Disabled	24.1	24.1	19.2	25.8
Area of Residence - Population Size (%)				
Village	37.4	33.1	32.1	36.4
City < 100k	33.0	35.5	34.3	37.3
City between 100-200k	17.7	18.7	20.8	21.4
City between 200-500k	12.0	11.7	12.8	4.8



Summary

- The prevalence of illegal cigarette packs was found to be most significant among smokers residing in the Northeastern (followed by Central and West) region of Poland.
- Possession of illegal cigarette packs is highest among smokers who are: 1) male; 2) within the ages of 40 to 49; 3) reside in a household earning between 800-1500 PLN per month; 4) have attained an elementary-level education or less; 5) are qualified blue-collar workers; 6) reside in small communities (cities with a pop. under 100,000).
- Roughly 10% of the packs surveyed displayed evidence of an illegal nature. Given the tax-paid implications associated with the presence of an excise tax stamp, the results of this analysis suggest that: A) approximately 6% of these illegal packs are the product of bootlegging activity between Poland and its Eastern neighbors; and B) the remaining 3% of the identified packs are attributable to larger scale tax evasion activity.
- According to the point-of-purchase information provided by the smoker respondents, grocery stores (50.7%) and newsstands (31.4%) account for the vast majority of legal cigarette sales in Poland. Similarly, illegal cigarette packs are also purchased at grocery stores (21.4%) and newsstands (16.9%) with a significant proportion also being purchased at open-air marketplaces with either fixed (35.2%) or mobile (15.6%) sellers.
- The leading cigarette brand among illegal packs is L&M. This brand captures nearly 10% of the gray market's cigarette sales. L&M is also reported as the second most popular brand among legal cigarette purchases (~13%) while the most popular legal brand, Red & White, accounts for a slightly larger, 14%, of the legal market.
- The average national price of an illegal pack of L&M-brand cigarettes is significantly less than its legal counterpart (20% less or 4.96 PLN versus 3.99 PLN for "Lights" and 25% less or 4.71 PLN versus 3.56 PLN for Regular Flavor).

