



11th April 2024

Dear Mr Kellner,

Thank you for your letter regarding the retailer survey results we cited in our December 06th submission.

Given the obviously hugely damaging impact of the impractical and illiberal proposed generational ban on retailers nationwide, we commissioned a survey with independent survey company, Acorn Retail Promotions, to find out what retailers' perspectives were. Acorn Retail Promotions is the UK's leading telesales agency covering the convenience retail channel and has worked with a number of major FMCG brands since being founded in 2017.

500 independent and 500 symbol group retailers were surveyed via telephone between 17 October – 26 October 2023. Acorn used its nationwide database of retailers, selecting those who sell tobacco and splitting the call file evenly between independent and symbol retailers. The results are based on retailers who agreed to complete the survey with Acorn over the telephone. There were no other data selection rules.

The results were accurately reported by the grocery and convenience trade media, and our release made clear that the results were based upon *'Research conducted with 1,000 independent and symbol convenience retailers by Acorn Retail Promotions on behalf of JTI UK'*. The results tables are below.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Nicky Small'. The signature is fluid and cursive, with the first name 'Nicky' being more prominent than the last name 'Small'.

Nicky Small

Corporate Affairs & Communications Director, UK

JTI UK

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Results Tables

<i>Do you believe that a Generational Ban will have a positive or negative impact on your business?</i>	
Positive impact	14%
Negative impact	86%

<i>Do you believe that the Government has the funding and resource to police a Generational Ban (e.g., fining retailers who sell tobacco products to underage people)?</i>	
Yes	34%
No	66%

<i>On a scale of 1:5 (where 1 is 'not at all' and 5 is 'very likely'), how likely do you think it is that the proposed Generational Ban will lead to an increase in illicit tobacco activity?</i>	
1 – Not at all	3%
2 – Possible	3%
3 – Somewhat likely	7%
4 – Likely	19%
5 – Very likely	67%

<i>Do you believe that a Generational Ban will impact staff training, specifically around underage sales?</i>	
Yes	58%
No	42%

<i>On a scale of 1:5 (where 1 is 'not at all' and 5 is 'very likely'), how likely do you think it is that a Generational Ban will make ID checks more complicated for you and your staff?</i>	
1 – Not at all	23%
2 – Possible	8%
3 – Somewhat likely	13%
4 – Likely	17%
5 – Very likely	38%

<i>How important is the tobacco category in terms of generating footfall in your store?</i>	
Not very important	9%
Slightly Important	18%
Important	33%
Very Important	40%

<i>What percentage of your total revenue / turnover are from customers who are buying tobacco AND other non-tobacco related items (e.g. basket spend - milk, bread, drinks etc)?</i>	
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Less than 1%	2%
1% to 4%	7%
5% to 9%	9%
10% to 14%	14%
15% to 19%	7%
20% to 24%	9%
25% to 29%	5%
30% to 34%	10%
35% to 39%	3%
40% to 44%	5%
45% to 49%	2%
50% or more	26%

<i>Do you believe that the Generational Ban will be costly to your business in terms of implementation?</i>	
Yes	62%
No	38%