SURVEY OF YOUNG PEOPLE IN ONTARIO

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Methodology

• The methodology utilized for this research was a custom online survey using the Ipsos iSay Online Panel.

• The research was conducted among young people ranging from the age of 16-24 in the province of Ontario.
  – Sample boosts were conducted within the Eastern Ontario region (select census divisions) and the South West Ontario region (whole region).

• In total, n=735 young people aged 16-24 completed the survey (All Ontario, n=500 / East ON boost, n=185 / South West ON boost, n=50).

• The survey instrument was 10 minutes in length and was verified as online and mobile-friendly.

• The survey was conducted between December 3rd – 17th, 2015.
Sampling

- A sample frame was developed and quotas applied to recruit respondents from the online panel based on age, gender and region (either Ontario as a whole, specific census division areas in Eastern Ontario or South West Ontario) to ensure a wide cross-section of the Ontario youth population participated in the survey.

- Permission for respondents aged 16 and 17 to complete the online survey was requested from a parent/guardian, while those aged 18 – 24 were invited directly to complete the survey.

- Statistical margins of error are not applicable to online polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. The precision of online polls is measured using a credibility interval. Bayesian Credibility Intervals measure the degree of certainty one has in the results based on one’s experience, understanding and knowledge of the population, tempered by the data that has been observed. In this case, the poll has a credibility interval of plus or minus 4.1 percentage points. See Appendix Slide 35 for further explanation of the credibility interval.

- Where figures do not sum to 100, this is due to the effects of rounding.
SURVEY OF YOUNG PEOPLE IN ONTARIO

Sample Boosts

• Within Eastern Ontario, targeted locales for the sample boost were defined by census division and included:
  – Frontenac
  – Hastings
  – Lanark
  – Leeds and Grenville
  – Lennox and Addington
  – Ottawa
  – Prescott and Russell
  – Prince Edward
  – Stormont, Dundas and Glengarry
  – Renfrew

• Teens from anywhere within the census divisions for South West Ontario were targeted for the sample boost in this region.
Key Findings

• Peer-to-peer influence, such as the influence of friends/co-workers, is significant to the initial decision to smoke cigarettes (47%), as is the natural inclination to experiment (38%) and the pressure to ‘fit in’ (26%).

• One-quarter (24%) of young people indicate that parents/family members who are/were smokers led to them trying cigarettes too.

• There is a distinct division between those who view reducing young peoples’ exposure to smoking and cigarettes as a personal/private issue and those who view it as a public issue:
  – For some, tobacco companies and the Government have a joint responsibility for reducing smoking among young people. The view that tobacco companies are primarily responsible for enticing young people to start smoking is more likely to be held by those who think the Government is responsible for reducing young peoples exposure to cigarette ads (30%).
  – Alternatively, the view that young people who start smoking are primarily responsible for the decision to do so is more likely to be held by those who think parents/guardians are responsible for reducing young peoples exposure to cigarette advertising (78%).
Key Findings, cont.

• As 75% of young people hold the view that young people who start smoking are primarily responsible for the decision to do so, the role that the Government should play in preventing this may be unclear, particularly among younger respondents aged 16-18 who are more likely to hold this view (82%).

• Young males may be more difficult to reach or engage with anti-smoking behaviour or anti-tobacco industry messaging as this group have higher trust in the tobacco industry.

• Regardless of packaging concept viewed (e.g. branded packaging or plain packaging), the majority of young people hold the view that people their age would be most likely to purchase branded cigarettes (65%).

• Those who have never smoked are more likely to indicate that they ‘strongly oppose’ cigarette plain packaging (20%), compared to smokers (10%). This results may indicate that:
  – Non-smokers are less likely to give consideration to cigarette packaging in general (“out of sight, out of mind”)
  – Non-smokers are concerned that plain cigarette packaging may not include health warnings
RESULTS IN DETAIL
Incidence of Smoking Among Teens

46% of young people in Ontario have smoked

More likely to have ever smoked
- Respondents aged 19-24 (51%), compared to those aged 16-17 (37%)
- Those in Eastern Ontario (61%), compared to those in South West Ontario (44%)
- Those who support cigarette plain packaging (58%)

They smoke, on average, 43 cigarettes per week

- Fewer than one cigarette a week: 3%
- Between 1 - 5 cigarettes a week: 21%
- Between 6 - 10 cigarettes a week: 14%
- Between 11 - 15 cigarettes a week: 7%
- Between 16 - 20 cigarettes a week: 10%
- Between 21 - 24 cigarettes a week: 1%
- A pack of 25 cigarettes a week: 4% (7% South West / 5% E. Boost, vs. GTA<1%)
- More than one pack of 25 cigarettes a week: 41%
Those Who Consider Themselves Social Smokers

Those who consider themselves to be ‘social smokers’

✓ Are most likely to be influenced by friends/co-workers (64%)
✓ Their choice of brand is more likely to be influenced by ‘endorsements’ (57%), such as the brand others are smoking (44%)
✓ Are more likely to trust tobacco companies ‘completely’ (16%), compared to smokers (12%), those who have quit smoking (<1%), those who have tried smoking a few times (4%) and those who have never smoked (4%)
✓ Are less likely to trust the Ontario Provincial Government (42%), than those who have never smoked (28%) or their local government (40%), compared to those who have never smoked (24%)
✓ Are more likely to have been/be influenced by the health warning on cigarette packages (31%), compared to those who smoke daily (15%)
✓ Have a higher awareness of cigarette advertising (80% have seen advertising in the last 12 months) and are more likely to think that tobacco company advertising and promotion influences young people to start smoking (33% ‘a lot’)
✓ And while they are split on support/opposition for plain cigarette packaging (13% support / 12% oppose), they are more likely to think that the tobacco industry uses cigarette package design as a marketing tactic (74%), compared to those who smoke daily (54%) or those who have never smoked (61%).

10% OF ONTARIO YOUTH ARE SOCIAL SMOKERS

THEY SMOKE, ON AVERAGE, 9 CIGARETTES PER WEEK

- Fewer than one cigarette a week: 6%
- Between 1 - 5 cigarettes a week: 51%
- Between 6 - 10 cigarettes a week: 19%
- Between 11 - 15 cigarettes a week: 8%
- Between 16 - 20 cigarettes a week: 8%
- Between 21 - 24 cigarettes a week: 0%
- A pack of 25 cigarettes a week: 3%
- More than one pack of 25 cigarettes a week: 5%

Q2. How many cigarettes do you smoke on average, per week? Base: Those who smoke cigarettes socially n=73

^ Eastern Ontario (n=60), not including East Boost oversample of selected census division areas only
Q1. Which of the following best describes your smoking behaviour? Base: All Respondents n=735

- % have smoked 40%
- % currently smoke 29%
- AVG cigarettes/week (mean) 44.8

Q2. How many cigarettes do you smoke on average, per week? Base: Those who smoke cigarettes daily or socially

- % have smoked 61%
- % currently smoke 37%
- AVG cigarettes/week (mean) 47.1

Incidence of Smoking Among Teens

<table>
<thead>
<tr>
<th>Region</th>
<th>% have smoked</th>
<th>% currently smoke</th>
<th>AVG cigarettes/week (mean)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Ontario</td>
<td>40%</td>
<td>29%</td>
<td>44.8</td>
</tr>
<tr>
<td>Eastern Ontario</td>
<td>61%</td>
<td>37%</td>
<td>47.1</td>
</tr>
<tr>
<td>Central Ontario</td>
<td>44%</td>
<td>27%</td>
<td>52.7</td>
</tr>
<tr>
<td>South Western Ontario</td>
<td>44%</td>
<td>30%</td>
<td>60</td>
</tr>
<tr>
<td>Ottawa</td>
<td>42%</td>
<td>23%</td>
<td>24.5</td>
</tr>
<tr>
<td>Prescott and Russell</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Stormont, Dundas and Glengarry</td>
<td>4</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Hastings</td>
<td>13</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Lanark</td>
<td>5</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Lennox and Addington</td>
<td>4</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Prince Edward</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Lennox</td>
<td>9</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Stormont, Dundas and Glengarry</td>
<td>12</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Frontenac</td>
<td>13</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Hastings</td>
<td>9</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Prince Edward</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Lennox</td>
<td>4</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>GTA</td>
<td>48%</td>
<td>24%</td>
<td>27.2</td>
</tr>
</tbody>
</table>

Ottawa
- % have smoked 42%
- % currently smoke 23%
- AVG cigarettes/week 24.5

Prescott and Russell
- % have smoked 2
- % currently smoke 1

Stormont, Dundas and Glengarry
- % have smoked 4
- % currently smoke 1

Hastings
- % have smoked 13
- % currently smoke 1

Lennox and Addington
- % have smoked 4
- % currently smoke 1

GTA
- % have smoked 48%
- % currently smoke 24%
- AVG cigarettes/week 27.2

Caution when reviewing results within the Eastern Ontario Boost areas as data is reported on extremely small base sizes. As a result, in some instances, number of respondents, rather than proportion of respondents is shown.
Smoking Influences

Ontario teens report ‘friends/co-workers’ and ‘Experimenting’ as the main influences for starting to smoke, while the brand others are smoking is attributed as the main influence of the choice of brand to smoke.
Smoking Cessation

Of teens who have quit smoking, the majority have done so cold turkey.

5% OF YOUNG PEOPLE HAVE QUIT SMOKING

27% OF YOUNG PEOPLE ARE CURRENTLY SMOKERS

More likely to have not tried to quit

- Respondents aged 16-18 (46%)
- Respondents who have not completed high school (41%)
- Those who are undecided about whether they support/oppose plain packaging (41%)
- Those who reside in South West Ontario (32%) or in the Eastern ON boost areas (35%), compared to those in the GTA (14%).

Q5. How did you quit smoking? Base: Those who have quit smoking cigarettes n=40
Q6. Have you tried to quit smoking in the past 12 months, for longer than a 24 hour period, using any of the following methods?
Base: Those who smoke cigarettes daily or socially n=206

Have Quit
- Cold turkey: 35%
- Gradual decrease: 18%
- Support from a buddy: 13%
- Nicotine Replacement Therapy (NRT): 11%
- Switched to reduced-nicotine e-cigarette: 6%
- Switched to nicotine free e-cigarette: 8%
- Phoned a quit line/Smokers' Helpline: 1%
- Smoking cessation counselling: 4%
- Attended a smoking cessation session: 3%
- Other: 4%

Current smokers
- No, I have not tried to quit smoking: 25%
- Don’t know: 1%

For more information, please contact Ipsos at info@ipsos.com.
Smoking Cessation Influences

Older youth are more likely to require evidence from news articles or published research to influence them to quit smoking, while younger teens are more likely to be influenced by their parents and plainer cigarette packaging.

<table>
<thead>
<tr>
<th>Influence</th>
<th>Current smokers</th>
<th>Have Quit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your parents</td>
<td>28%</td>
<td>46%</td>
</tr>
<tr>
<td>Your friends</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>Greater restrictions on locations where you can smoke</td>
<td>15%</td>
<td>27%</td>
</tr>
<tr>
<td>Your doctor</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>Health warnings on cigarette packages</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>News articles/published research about the dangers of smoking</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Government/public service messages</td>
<td>8%</td>
<td>18%</td>
</tr>
<tr>
<td>Plainer cigarette packaging</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
<td>32%</td>
</tr>
<tr>
<td>None of the above</td>
<td>19%</td>
<td></td>
</tr>
</tbody>
</table>

5% of young people have quit smoking

27% of young people are currently smokers
### Trust and Familiarity

**81%**

**OF YOUNG PEOPLE DO NOT TRUST TOBACCO COMPANIES**

<table>
<thead>
<tr>
<th>How much do you trust 'Tobacco Companies' to act with your best interests in mind?</th>
<th>Completely</th>
<th>Somewhat</th>
<th>Not very much</th>
<th>Not at all</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>6%</td>
<td>12%</td>
<td>22%</td>
<td>44%</td>
<td>7%</td>
</tr>
<tr>
<td>Smokers</td>
<td>3%</td>
<td>15%</td>
<td>25%</td>
<td>44%</td>
<td>7%</td>
</tr>
<tr>
<td>Non-smokers</td>
<td>12%</td>
<td>7%</td>
<td>21%</td>
<td>59%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**55%**

**OF YOUNG PEOPLE ARE NOT FAMILIAR WITH THE TOBACCO INDUSTRY**

<table>
<thead>
<tr>
<th>Agree/Disagree: I don’t know much about the tobacco industry.</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>27%</td>
<td>28%</td>
<td>26%</td>
<td>11%</td>
<td>8%</td>
</tr>
</tbody>
</table>

More likely to trust the Tobacco Industry ‘completely/somewhat’

- Respondents who support cigarette plain packaging (17%)
- Those who smoke socially (32%)
- Those who reside in Northern Ontario (16%)
- Male respondents (16%)

More likely to be familiar with the Tobacco Industry

- Those who are smokers (46%) and smoke daily (47%)
- Respondents aged 19-24 (42%)
- Those who reside in the GTA (42%)
- Respondents who have completed high school (37%), those with some post secondary education (41%), or who have completed university (46%)

Q8. How much do you trust each of the following to act with your best interests in mind? Tobacco Companies.

Q12_1 Do you agree or disagree with the following statements: I don’t know much about the tobacco industry.

Base: All Respondents n=735
Trust in Other Sources

Trust is highest for family doctors and lowest for tobacco companies. Smokers are more likely to indicate they trust tobacco companies, than non-smokers.

- **Your family doctor**
  - Total: 89%
  - Smokers: 86%
  - Non-smokers: 90%

- **Local government**
  - Total: 62%
  - Smokers: 48%
  - Non-smokers: 67%

- **Ontario Provincial government**
  - Total: 50%
  - Smokers: 36%
  - Non-smokers: 64%

- **Social media websites**
  - Total: 36%
  - Smokers: 34%
  - Non-smokers: 37%

- **Soft drink companies**
  - Total: 25%
  - Smokers: 24%
  - Non-smokers: 26%

- **Tobacco companies**
  - Total: 13%
  - Smokers: 8%
  - Non-smokers: 27%

**Those less likely to trust their family doctor**
- Males (12%)
- Those who have completed high school (9%) or completed university (12%), compared to those who have not completed high school (4%)
- Those who smoke (11%), particularly those who smoke daily (13%) or those who have quit smoking (16%)

**Those less likely to trust their local gov or ON Prov Gov**
- Those who reside in Eastern Ontario (44%)
- Smokers (46%), compared to those who have never smoked (24%)
- Those aged 24 (41%), compared to those aged 18 (25%)
- Those who reside in Central Ontario (55%), compared to SW ON (34%), GTA (30%), East Boost (30%)
- Smokers (45%), compared to those who have never smoked (28%)

**Those more likely to trust tobacco companies or soft drink companies**
- Respondents who support cigarette plain packaging (17%)
- Those who smoke socially (32%)
- Those who reside in Northern Ontario (16%)
- Male respondents (16%)
- Age 16-18 (34%), compared aged 19-24 (21%)
- Those who reside in the GTA (28%), compared to East Boost (19%)
- Those who have not completed high school (30%, compared to those with some post-sec education (20%)
- Those who oppose cigarette plain packaging (32%)
Attitudes Towards the Tobacco Industry

50% AGREE THE TOBACCO INDUSTRY MISLEADS THE PUBLIC ABOUT HEALTH EFFECTS OF CIGARETTES

- 23% Strongly agree
- 27% Somewhat agree
- 25% Somewhat disagree
- 13% Strongly disagree
- 12% Don’t know

More likely to agree:
- Those who have never smoked (54%)
- Respondents aged 17 (64%)
- Those who have completed university (59%)

66% AGREE THE TOBACCO INDUSTRY SHOULD BE REGULATED THE SAME AS OTHER INDUSTRIES

- 38% Strongly agree
- 28% Somewhat agree
- 16% Somewhat disagree
- 6% Strongly disagree
- 12% Don’t know

More likely to agree:
- Those who have quit smoking (78%) and those who have never smoked (68%)
- Respondents who support cigarette plain packaging (77%)
- Respondents aged 16 (83%), 17 (75%), and 24 (71%)

Q12_2/3. Do you agree or disagree with the following statements: The tobacco industry misleads the public about the health effects of cigarettes / The tobacco industry should be regulated the same as other industries.
Base: All Respondents n=735
Q11. How much do you think tobacco companies advertising and promotion influences young people to start smoking?
Q12_6. Do you agree or disagree with the following statements I don’t feel that tobacco industry advertising targets me or people like me.

**Tobacco Industry Advertising**

**THINK TOBACCO COMPANY ADVERTISING AND PROMOTION HAS A STRONG INFLUENCE ON YOUNG PEOPLE TO START SMOKING**

- **A lot**: 23%
- **Somewhat**: 38%
- **Not very much**: 21%
- **Not at all**: 11%
- **Don’t know**: 8%

**More likely to agree**
- Females (65%)
- Those who support cigarette plain packaging (65%)

**DON’T FEEL THAT TOBACCO INDUSTRY ADVERTISING TARGETS THEM OR PEOPLE LIKE THEM.**

- **Strongly agree**: 15%
- **Somewhat agree**: 24%
- **Somewhat disagree**: 29%
- **Strongly disagree**: 19%
- **Don’t know**: 14%

**More likely to disagree (e.g. Feel that the advertising targets them):**
- Respondents aged 16 (56%), 19 (52%), 21 (50%), and 24 (55%)
- Those who reside in the Eastern Ontario region (55%) or Eastern ON boost areas (55%), compared to those in South West Ontario (40%)
Q9. Have you seen any of the following cigarette advertising in the last 12 months? / Q10. How much do you trust the advertising you have seen from tobacco companies? Base: All Respondents n=735

**Cigarette Advertising**

**HAVE SEEN CIGARETTE ADVERTISING LATELY**

- Smoking in movies or on TV: 50%
- Advertisements in stores: 21%
- Magazine/newspaper/online ads promoting cigarettes: 17%
- Cigarette promotions from tobacco companies: 16%
- Clothing/item with cigarette brand name or logo: 13%
- Free gifts/discounts on other products with purchase of cigarettes: 7%
- None of the above: 26%
- Don’t know: 11%

**TRUST ADVERTISING THEY SEE FROM TOBACCO COMPANIES**

- Completely: 6%
- Somewhat: 17%
- Not very much: 37%
- Not at all: 33%
- Don’t know: 6%

More likely to trust advertising they see from tobacco companies:
- Respondents who reside in the GTA (28%)
- Those who smoke (38%)
Tobacco Industry Behaviour

Younger teens and smokers tend to hold a more positive view of the tobacco industry.

Like any company, the tobacco industry is trying to find new ways to attract more customers.

The tobacco industry is sneaky in the steps it takes to market its products.

The tobacco industry markets their products in an ethical and appropriate manner.

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>41%</td>
<td>28%</td>
<td>10%</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>33%</td>
<td>32%</td>
<td>20%</td>
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<td>13%</td>
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<td>4%</td>
<td>7%</td>
<td>28%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>9%</td>
<td>14%</td>
<td>25%</td>
<td>9%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Those who agree the industry is looking for new ways to attract more customers

- Non-smokers (77%), compared to smokers (67%)
- Those who have quit smoking (83%), compared to those who smoke socially (63%)
- Those who have completed university (82%), compared to those who have completed high school (69%)

Those who agree the industry is sneaky in the steps it takes to market products

- Respondents aged 24 (67%), compared to those aged 18 (51%)

Those who agree the industry markets products ethically

- Respondents who reside in the GTA (39%), compared to those in East Boost (28%)
- Those who smoke (48%), compared to non-smokers (30%), those who have quit smoking (24%), those who have tried smoking a few times (33%) and those who have never smoked (30%)
Responsibility to Reduce Exposure to Advertising

While the Government and Parents/Guardians are held responsible by young people to reduce youth exposure to cigarette advertising, three quarters hold the view that young people who start smoking are primarily responsible for the decision to do so (75%).

**Who do you think should take primary responsibility for reducing young people’s exposure to cigarette advertising?**

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
<td>61%</td>
</tr>
<tr>
<td>Parents/guardians</td>
<td>58%</td>
</tr>
<tr>
<td>Tobacco industry</td>
<td>44%</td>
</tr>
<tr>
<td>School/educators</td>
<td>44%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Young people who start smoking are primarily responsible for the decision to do so.

- 75% likely to agree that young people are responsible
- 25% likely to agree that companies are responsible

**Likely to agree that young people are responsible**
- Respondents aged 16-18 (82%)
- Those who have not completed high school (83%)
- Those who think parents/guardians are responsible for reducing exposure to cigarette advertising (78%)

**Likely to agree that companies are responsible**
- Respondents aged 19-24 (29%)
- Respondents who quit smoking (47%)
- Those who think government is responsible for reducing cigarette ads (30%)
- Those who have completed high school (28%) and those who have completed university (31%)

Q17. Who do you think should take primary responsibility for reducing young people’s exposure to cigarette advertising? / Q18. Which statement is closest to your own view? Base: All Respondents n=735
A ‘split sample’ approach was used to neutralize any effect the graphic health warning images may have introduced when viewing the ‘plain packaging’.
Q12.8. Do you agree or disagree with the following statements: The tobacco industry uses cigarette package design as a marketing tactic. Q14. Do you support or oppose cigarettes being sold in plain packaging? Base: All Respondents n=735

**Cigarette Packaging Design & Purchase Behaviour**

**58%** AGREE THAT THE TOBACCO INDUSTRY USES CIGARETTE PACKAGE DESIGN AS A MARKETING TACTIC

<table>
<thead>
<tr>
<th>Total</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22%</td>
<td>36%</td>
<td>20%</td>
<td>10%</td>
<td>13%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Smokers</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25%</td>
<td>36%</td>
<td>19%</td>
<td>12%</td>
<td>8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-smokers</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>21%</td>
<td>36%</td>
<td>20%</td>
<td>9%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**36%** SUPPORT CIGARETTES BEING SOLD IN PLAIN PACKAGING

<table>
<thead>
<tr>
<th>Total</th>
<th>Strongly support</th>
<th>Somewhat support</th>
<th>Somewhat oppose</th>
<th>Strongly oppose</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13%</td>
<td>18%</td>
<td>29%</td>
<td>22%</td>
<td>32%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Smokers</th>
<th>Strongly support</th>
<th>Somewhat support</th>
<th>Somewhat oppose</th>
<th>Strongly oppose</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18%</td>
<td>20%</td>
<td>19%</td>
<td>15%</td>
<td>19%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-smokers</th>
<th>Strongly support</th>
<th>Somewhat support</th>
<th>Somewhat oppose</th>
<th>Strongly oppose</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>12%</td>
<td>20%</td>
<td>19%</td>
<td>17%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Support for Cigarette Plain Packaging

**SUPPORT CIGARETTE PLAIN PACKAGING**

- Young people who reside in Eastern Ontario (50%), compared to those who reside in Central Ontario (25%) or the GTA (35%)
- Smokers (47%), compared to non-smokers (32%) and those who have never smoked (28%)
- More likely to agree that the tobacco industry should be regulated the same as other industries (45%), compared to those who oppose cigarette plain packaging (33%)
- More likely to think that tobacco companies advertising and promotion influences young people to start smoking (65%), than those who are undecided about plain cigarette packaging (54%)
- Those who smoke daily are more likely to ‘strongly support’ cigarette plain packaging (19%)

**OPPOSE CIGARETTE PLAIN PACKAGING**

- Young people who reside in the GTA (38%), compared to those who reside in Eastern Ontario (23%)
- Those who have never smoked are more likely to indicate that they ‘strongly oppose’ cigarette plain packaging (20%), compared to smokers (10%)

**‘DON’T KNOW’ RESPONSE**

- Non-smokers (32%), those who have quit smoking (35%) and those who have never smoked (34%)

This may suggest that smokers are more aware of the influence of packaging on their smoking and purchasing behaviour.

This disconnect may be due to non-smokers’ general lack of consideration about cigarette packaging or a concern among non-smokers that plain packaging may not include health warnings.
65% of young people hold the view that people their age would be more likely to purchase name brand cigarettes in branded packaging.
Cigarette Plain Packaging
SUPPORT / OPPOSITION AMONG YOUNG PEOPLE

On-Screen Intro:

Currently, cigarettes are sold in **branded packaging** that show the colour and design of the cigarette company.

Cigarettes may one day be sold in **plain packages** that do not show the colour and design of the cigarette company, but contain the same product. Plain packaging means that all cigarette packages would be the same colour, use the same font style and size, and would have no branding or logos.

### Table: Support and Opposition among Young People

<table>
<thead>
<tr>
<th>Option</th>
<th>Total</th>
<th>Smokers</th>
<th>Non-smokers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name brand cigarettes, in branded packaging</td>
<td>65%</td>
<td>72%</td>
<td>62%</td>
</tr>
<tr>
<td>Name brand cigarettes, in plain packaging</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
<td>13%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Q13. Considering the option of branded cigarette packaging or plain cigarette packaging, which type do you think people your age would be more likely to purchase? 

Base: All Respondents n=735
Packaging Purchase behavior (SMOKERS /HAVE QUIT)

Smokers and those who have quit smoking hold the same view that people their age would be more likely to purchase name brand cigarettes in branded packaging.

Nearly three quarters indicate they would have been more likely to purchase name brand cigarettes in branded packaging when they first started smoking. Little has changed nowadays as the majority would still be likely to choose cigarettes in branded packaging.

<table>
<thead>
<tr>
<th>Packaging Purchase behavior</th>
<th>Name brand cigarettes, in branded packaging</th>
<th>Name brand cigarettes, in plain packaging</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thinking back to when you first started smoking, which of the following cigarette packages would you have been most likely to purchase?</td>
<td>73%</td>
<td>19%</td>
<td>8%</td>
</tr>
<tr>
<td>Nowadays, which of the following cigarettes packages would you be most likely to purchase?</td>
<td>65%</td>
<td>21%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Q13. Considering the option of branded cigarette packaging or plain cigarette packaging, which type do you think people your age would be more likely to purchase? Base: All Respondents n=735 / Q15a. Thinking back to when you first started smoking, which of the following cigarette packages would you have been most likely to purchase? / Q15b. Nowadays, which of the following cigarettes packages would you be most likely to purchase? Base: Those who smoke cigarettes daily or socially and those who have quit smoking n=246
Packaging Purchase behavior (NON-SMOKERS)

The majority of non-smokers hold the view that people their age would be more likely to purchase name brand cigarettes in branded packaging.

Upon viewing both the branded packaging and plain packaging concepts, the majority of non-smokers continue to hold the view that people their age would be most likely to purchase name brand cigarettes in branded packaging.

Q13. Considering the option of branded cigarette packaging or plain cigarette packaging, which type do you think people your age would be more likely to purchase?

Q16. Which of the following cigarettes do you think people your age would be most likely to purchase?

- Name brand cigarettes, in branded packaging: 62% (Non-smokers), 65% (Total)
- Name brand cigarettes, in plain packaging: 14% (Non-smokers), 15% (Total)
- Don't know: 24% (Non-smokers), 21% (Total)

- Name brand cigarettes, in branded packaging: 66%
- Name brand cigarettes, in plain packaging: 18%
- Don't know: 16%

Concept Viewed 1/2/A/B (Combined)

Those who have tried smoking cigarettes a few times or who have never smoked cigarettes n=489
NEXT STEPS
Surveys of Young People in Ontario

Next Steps

• While the majority of young people agree that people their age would be more likely to purchase name brand cigarettes in branded packaging (65%), overall support for plain cigarette packing is low (36%). The same proportion of young people oppose plain cigarette packaging (36%) and nearly three in ten ‘Don’t know’ (29%).
  – Opportunity for greater public education to promote the benefits of adopting plain cigarette packing

• Need to address ‘Social Smokers’ specifically:
  – These young people do not consider themselves ‘smokers’
  – Are more trusting of tobacco companies, less trusting of government
  – Are highly aware of cigarette advertising and agreement that tobacco company advertising and promotion influences young people to start smoking
  – Are split on support/opposition of plain cigarette packaging, but also readily recognize that tobacco industry uses cigarette package design as a marketing tactic
Demographics

Gender

- 52% Male
- 48% Female

Region

- North: 5%
- Central: 8%
- Southwest: 26%
- GTA: 46%
- East: 2%
- East Boost: 13%

Age

- 16-18: 33%
- 19-24: 67%

Individual Age Categories:
- 16: 11%
- 17: 11%
- 18: 11%
- 19: 12%
- 20: 11%
- 21: 12%
- 22: 11%
- 23: 10%
- 24: 12%

Education

- < High School: 25%
- Completed High School: 27%
- Some Post-Sec/Completed College: 29%
- Completed University: 19%
Concept Test
HALF THE SAMPLE WERE SHOWN CONCEPTS 1 AND 2

A ‘split sample’ approach was used to neutralize any effect the graphic health warning images may have introduced when viewing the ‘plain packaging’.

Concept 1
Current Branded Packaging, with health warning

Concept 2
Plain Packing, with health warnings
Concept Test

WHILE THE OTHER HALF OF THE SAMPLE WERE SHOWN CONCEPTS A AND B

Concept A
Current Branded Packaging, with censored health warning

Concept B
Plain Packing, with censored health warnings
Bayesian Credibility Intervals

• Ipsos is moving away from the use of “classical” margins of error to demonstrate confidence in the accuracy of online polling results. We have adopted Bayesian Credibility Intervals as our standard for reporting our confidence in online polling results. In order to produce an accurate margin of error, one must know the probability of participation for each member of the survey population, or, everyone in the population must have a known chance of participating in the survey.

• Online polling, most often conducted by the use of panels of consumers/citizens, does not meet the condition of because of two effects: non-response bias and coverage bias. Therefore, the probability of being included in any given online survey sample is unknown, very difficult to ascertain, or simply zero (non-internet users).

• Bayesian Credibility Intervals operate much in the same way as classical margins of error, but acknowledge the uncertainty of an estimate (in our case, the probability of any given person to complete an online survey). Bayesian models allow us to generalize from a sample to a population, since they corrected for unbalanced samples due to non-response, coverage or other biases.