

EVALUATION OF RETAILERS' BEHAVIOUR TOWARDS CERTAIN YOUTH ACCESS-TO-TOBACCO RESTRICTIONS

Final Report Findings: 2005

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Executive Summary

Background

This report summarizes results from the latest independent investigation into retailer behaviour with respect to key aspects of Canadian tobacco legislation, in particular that part of the laws regarding youth access to tobacco. The laws regulating tobacco sales in Canada are embodied in the federal government's *Tobacco Act* and in corresponding provincial legislation. The Corporate Research Group Ltd. (CRG) has conducted the independent measurements of retailer compliance with the sales-to-minors provisions of the laws for Health Canada since 2004. The study has been conducted since 1995.

The scope and methodology of this work has evolved over the years but maintain direct links to the original study design. In the effort to provide as much continuity as possible with the baseline measurements established in prior years, CRG's approach to the study was to keep the field research and data reporting methods held as constant as possible with those of previous years. Notes are provided where and when changes to the methodology occurred, as well as cautionary advice on how to interpret the data.

Research teams consisting of one young Canadian (15, 16 or 17 years old) and one adult (over 19 years old) were sent into tobacco-selling establishments across 30 cities in each of 10 Canadian provinces. Minors attempted to buy a brand-name pack of cigarettes but refused the transaction if retailers appeared willing to sell. If asked their age, teens were instructed to be untruthful. However, they carried no identification and made no effort to disguise their appearance. Adult observers were responsible for the supervision of minors as well as for the collection of data relating to the posting of signs consistent with the tobacco laws and for the gathering of information relating to the availability of tobacco advertising at point of sale. Team members operated independently of one another.

Retailers in five classes of trade were sampled: chain convenience, gas stores/kiosks, grocery, independent convenience, and pharmacies (only in provinces where the sale of tobacco in pharmacies is permitted).

A total of 5,561 stores were visited. Thirty cities across Canada form part of this study. The same cities have been consistently studied since 2002.

In Saskatchewan, unlike the 2004 survey, retailers were considered non-compliant if signs were posted other than those mandated by law. This was due to various amendments to legislation which have come into force.

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Observations relating to "Operation ID" have only been studied for the past four years. All other measurements for this year's survey were collected and recorded in the same way as always.

Key Findings

1. Tobacco Sales-to-Minors Legislation: Retailer Behaviour with Respect to Provisions Prohibiting Tobacco Sales to Minors (Tables A, B, C)

The national retailer compliance levels regarding youth access to tobacco has exceeded the Federal Tobacco Control Strategy's (FTCS) 10-year target objective of 80% or greater. The current level stands at 80.8%.

Nationally, the percentage of retailers refusing to sell cigarettes to underage Canadians declined from last year's results of 82.3%. The figure is weighted (i.e., raw data has been extrapolated to reflect conditions we might have found had all stores in the 30 cities been visited instead of just a sample of stores). Using the empirical rule, 95% of the elements have a parameter that falls within two standard deviations of the mean for that parameter in a normal distribution. Therefore, the results are accurate +/- 2 points at the 95% confidence level, meaning any result that is this year's findings that is within +/- 2 points from last year's results is statistically insignificant and statistically significant if the difference is outside of this range. Hence, on a national level, the variance of -1.5% between 2005 and 2004 represents a statistically insignificant decrease.

Please use caution when applying the national confidence level and, subsequently, the margin of error when comparing sub-category results, i.e., class of trade, region, between this year and last year. The national confidence level is used to give a broad margin of error and it is not intended to be applied to sub-categories or smaller samples. Confidence levels may vary in small sample sizes of sub-categories, since standard deviations may also vary due to the uniqueness of the samples' distribution around the mean.

Consistent with the slight decrease in the percentage of retailers refusing to sell to underage youth, the number of retailers asking for ID also declined. This year indicates a compliance of 76.4% when asking for ID, a decrease of 3.7% over the 2004 results (80.1%).

Retailers' willingness to sell to minors increases with the age of the minor. This study shows that a retailer's willingness to sell tobacco products increases by 13.4% for 17 year olds over 15 year olds. Compliance rates were highest among the "25+ *but not senior*" category age group of the retail clerk (82.5%). This year, retailers were more compliant when the gender of the minor was male (85.3%) versus female (76.3%); a switch from previous years' observations where the females were more likely to be refused the sale of tobacco. And, female clerks asked for ID and refused to sell more

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often than males; consistent with previous years. These variances are statistically significant.

Also consistent with the national compliance levels, retailers refusing to sell to minors near schools and/or malls decreased slightly but not significantly this year by 0.7% (82.7%). Retailers elsewhere were compliant 79.7% of the time, a national decrease of 1.5% over 2004. The difference in total compliance by proximity to schools and/or malls is statistically significant (3.0%). The time of day of the visit was consistent with the last year's results. The trend was that retailers were more compliant before noon and became less compliant as the day progressed. Compliance rates dropped from 88.0% before noon to 77.6% after 6:00 pm. Consistent with last year's results, clerks were found less likely to show willingness to sell when adult customers were present in the store at the time of the minor's attempt to purchase cigarettes.

In 2005, the highest rate of compliance among the five classes of trade studied in this report belongs to pharmacies, consistent with previous years. Although there has been a reduction in the overall number of pharmacies selling tobacco products, there is an increase in compliancy levels among those pharmacies continuing to sell tobacco products. Among the trade classes, grocery stores rank second and chain convenience stores rank third in compliance. All classes of trade, except pharmacies, have decreased in compliance levels since last year's study. However, chain convenience, gas stores/kiosks and independent convenience stores have an insignificant decrease (+/- 2 points). Grocery stores decreased in compliance by 2.3%.

This year, although the national compliance level showed an insignificant change over last year, not all regions maintained status quo. There are six regions that experienced a substantial (double-digit) increase and six that experienced a substantial decrease in compliance this year over last. They are:

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Increase

- Saint John Δ 50.7%
- Saskatoon Δ 34.6%
- St. John's Δ 28.2%
- Vancouver 4 Δ 28.0%
- Fredericton Δ 18.7%
- Brandon Δ 10.5%

Decrease

- Moncton Δ -25.8%
- Red Deer Δ -21.7%
- Thunder Bay Δ -17.5%
- Sherbrooke Δ -13.5%
- Bathurst Δ -13.0%
- Edmonton Δ -11.3%

Among the encouraging details from the latest survey are these:

- 23 of 30 cities we visited reported compliance levels of 75% or greater. In descending order, they are:

SAINT JOHN	99.0%
SASKATOON	99.0%
ST. JOHN'S (NL)	98.4%
KINGSTON	94.4%
FREDERICTON	94.3%
WINDSOR	94.2%
KELOWNA	94.1%
REGINA	92.9%
VANCOUVER CMA	92.8%
SYDNEY	92.5%
OTTAWA	91.0%
CHICOUTIMI	
JONQUIERE	90.7%
CALGARY	90.3%
CHARLOTTETOWN (PEI)	90.1%
MEDICINE HAT	88.8%
SUDBURY	88.1%
ST. CATHARINES	86.5%
BATHURST	84.2%
HALIFAX	80.5%
CAMPBELL RIVER	
COURTENAY	78.5%
EDMONTON	78.4%
RED DEER	78.3%
BRANDON	77.2%

- the list contains five cities that were not on last year's list of cities with highest compliance: Saint John, Saskatoon, St. John's, Halifax, and Brandon; the first three listed achieved the highest levels of compliance;
- sales-to-minors compliance is at 80% or better (i.e., within the national target) in 19 of the 30 cities studied;

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- in 2005, compliance levels improved by a significant amount (double digits) in 6 regions: St. John's, Fredericton, Saint John, Brandon, Saskatoon and Vancouver 4;
- gains in Saint John, Saskatoon, St. John's, Kingston, St. Catharines, Sudbury, Montreal, and Vancouver CMA, propelled compliance levels to the highest recorded in their region since the study began taking measurements in 1995;
- among 21 regions where outlets were visited by 15 year olds, only three regions scored below 80% for this age group, with the lowest being Edmonton (59.7%). Four regions scored between 80% and 90% and retailers in 14 regions scored higher than 90%;
- among 24 regions where stores were visited by 16 year olds, retailers in six regions scored below 80% for this age group, with the lowest being Montreal (60.1%); retailers in five regions scored between 80% and 90%, and 13 regions scored greater than 90%;
- retailers in 10 regions scored below 80% for the 17 year olds age group, with the lowest being Quebec City (38.2%). Retailers in five regions scored between 80% and 90%, and retailers in 14 regions scored higher than 90% out of a total of 29 regions in which 17 year olds attempted to buy cigarettes; and
- compliance levels reached a new high (93.2%) among the pharmacies where tobacco is still sold.

This year's survey shows that certain outside variables continue to influence tobacco retailer sales-to-minors behaviour. The age of teens attempting to make a purchase remains among the most significant of these. The data show that compliance drops progressively by increments of approximately 13 percentage points among retailers dealing with 15-, 16- or 17-year-old customers (87.7% compliance for age 15; 74.3% compliance for age 17).

The age and gender of the clerk staffing the tobacco counter also appear to affect the result in measurable ways; older clerks are less apt to sell. And, as always, there exists a strong correlation between the willingness of retailers to ask for proper proof of age and the likelihood that they will refuse a sale to underage youth when no ID is shown.

In 2005, the percentage of retailers who asked for ID was 76.4%, a significant decrease from last year's rate of 80.1%, but still higher than the rates recorded in 2003 and 2002. Of the retailers who asked for ID, 97.9% were unwilling to sell when the minor claimed to not have ID on their person. When the minor wasn't even asked for ID, the minor was still refused a sale 25.2% of the time. This development is a contributing factor to this year's high overall national rate of retailer compliance. Also, the presence of other adults in the store at the time of the intended purchase pays a contributing factor to the

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compliance level. Retailers were more compliant when adults were present (83.3%) and less compliant when there were none (76.3%).

The findings were less conclusive concerning the influence of other variables on retailer tobacco sales behaviour. There still remains a 3% difference in compliance rates between retailers that are close to schools or malls and retailers that are elsewhere. Although there is a 10% variance between early morning visits and late evening visits, the majority of the visits did take place in the mid-range hours of the day and the compliance levels during these times are roughly the same as the national average. Compliance differences across these variables show no consistent trend and were either not significant nationally, or were at odds to the national result in a number of local markets¹.

Contrary to previous years, retailers are more likely to refuse a sale to underage boys than to underage girls nationally (85.3% refused to boys and 76.3% to girls); this result is not consistent at the level of individual regions. The national finding is skewed by the results in a relatively few number of larger and more populated communities. What is more accurate to say is that the gender of teens remains a variable of influence in some larger urban centres.

Of interest to stakeholders on both sides of the tobacco debate is the effect on retailer compliance of the industry-sponsored "Operation ID" program. This is the fourth year compliance measurements were taken along this dimension. We found an insignificant difference this year compared to last in retailers participating in "Operation ID" (+1.0%). Less than half (44.7%) of the 5,561 establishments visited for this year's study indicated program participation, compared with 43.7% the year before. The variance in participation rates at the regional level were largely dispersed amongst the 30 cities.

For the fourth consecutive year, retailers participating in "Operation ID" registered refusal rates that were significantly better at the national level than those posted by program non-participants (87.8% versus 76.4%, respectively). Measurable differences in line with the national findings were also observed across all retail classes of trade, except pharmacies, where refusal rates were high regardless.

Regionally, results are mixed and suggest that while compliance rates are higher nationally among retailers participating in "Operation ID", regionally, they vary from city to city. Of the 30 cities we visited, three cities showed insignificant differences. The increase in compliance recorded in participating retailers over non-participating retailers was considered large enough to be significant in 16 cities (53% of the sample). Just as meaningful, 11 cities showed a significantly higher compliance rate for non-participating retailers.

¹ Table 5, Chart 6 and Chart 7, respectively.

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Table A – Weighted – Sales to Minors Compliance Results by City/Province/Region – 2005

Region	% Unwilling to Sell (Compliant)	% Willing to Sell (Non-Compliant)	% Who Asked for ID	% Who Asked for ID but Were Unwilling to Sell	% Who Asked for ID and Were Willing to Sell	% Who Did Not Ask for ID and Were Willing to Sell
NATIONAL	80.8%	19.2%	76.4%	97.9%	2.1%	74.8%
ST. JOHN'S (NL)	98.4%	1.6%	95.4%	100.0%	0.0%	34.3%
CHARLOTTETOWN (PEI)	90.1%	9.9%	86.3%	96.5%	3.5%	50.1%
NEW BRUNSWICK	84.1%	15.9%	65.1%	97.1%	2.9%	40.3%
BATHURST	84.2%	15.8%	88.4%	95.2%	4.8%	100.0%
FREDERICTON	94.3%	5.7%	73.2%	98.5%	1.5%	17.2%
MONCTON	61.1%	38.9%	61.8%	93.9%	6.1%	92.1%
SAINT JOHN	99.0%	1.0%	55.4%	100.0%	0.0%	2.2%
NOVA SCOTIA	84.5%	15.5%	82.2%	99.1%	0.9%	83.1%
HALIFAX	80.5%	19.5%	78.3%	98.6%	1.4%	84.6%
SYDNEY	92.5%	7.5%	90.2%	100.0%	0.0%	76.6%
QUEBEC	70.4%	29.6%	59.8%	97.9%	2.1%	70.6%
CHICOUTIMI						
JONQUIERE	90.7%	9.3%	78.6%	98.9%	1.1%	39.4%
MONTREAL	69.5%	30.5%	56.7%	97.9%	2.1%	67.7%
QUEBEC CITY	68.3%	31.7%	64.7%	98.3%	1.7%	86.7%
SHERBROOKE	73.3%	26.7%	74.9%	93.9%	6.1%	88.2%
ONTARIO	77.1%	22.9%	76.7%	96.8%	3.2%	87.9%
KINGSTON	94.4%	5.6%	94.4%	100.0%	0.0%	100.0%
OTTAWA	91.0%	9.0%	90.5%	98.9%	1.1%	85.3%
ST. CATHARINES	86.5%	13.5%	80.2%	96.9%	3.1%	55.8%
SUDBURY	88.1%	11.9%	85.3%	99.0%	1.0%	75.2%
THUNDER BAY	66.5%	33.5%	61.2%	96.9%	3.1%	81.4%
TORONTO	69.7%	30.3%	71.6%	95.9%	4.1%	96.0%
WINDSOR	94.2%	5.8%	84.2%	96.3%	3.7%	17.1%
MANITOBA	72.0%	28.0%	69.8%	99.4%	0.6%	91.4%
BRANDON	77.2%	22.8%	77.2%	100.0%	0.0%	100.0%
WINNIPEG	71.6%	28.4%	69.2%	99.4%	0.6%	90.9%
SASKATCHEWAN	96.0%	4.0%	90.3%	99.0%	1.0%	32.1%
REGINA	92.9%	7.1%	91.9%	99.3%	0.7%	79.3%
SASKATOON	99.0%	1.0%	88.9%	98.8%	1.2%	0.0%
ALBERTA	84.7%	15.3%	84.4%	97.4%	2.6%	84.1%
CALGARY	90.3%	9.7%	86.7%	98.9%	1.1%	66.1%
EDMONTON	78.4%	21.6%	81.3%	95.6%	4.4%	96.3%
MEDICINE HAT	88.8%	11.2%	90.3%	98.4%	1.6%	100.0%
RED DEER	78.3%	21.7%	82.3%	95.2%	4.8%	100.0%
BRITISH COLUMBIA	91.8%	8.2%	91.5%	98.2%	1.8%	76.0%
KELOWNA	94.1%	5.9%	88.4%	100.0%	0.0%	50.8%
CAMPBELL RIVER						
COURTENAY	78.5%	21.5%	78.4%	98.3%	1.7%	93.4%
VANCOUVER CMA	92.8%	7.2%	92.9%	98.0%	2.0%	75.2%
VANCOUVER 1	87.1%	12.9%	87.2%	96.6%	3.4%	77.9%
VANCOUVER 2	96.2%	3.8%	98.0%	98.1%	1.9%	100.0%
VANCOUVER 3	94.3%	5.7%	94.6%	99.4%	0.6%	95.2%
VANCOUVER 4	98.2%	1.8%	93.6%	98.0%	2.0%	0.0%

Vancouver 1: Vancouver, Richmond

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table B – Weighted – % Retailers Refusing to Sell by Region – Trended Results*

Region	1995 Results	1996 Results	1997 Results	1998 Results	1999 Results	2000 Results	2002 Results	2003 Results	2004 Results	2005 Results	Statistically Significant > +/- 2%
NATIONAL	47.9%	60.5%	67.3%	61.0%	69.7%	69.8%	71.2%	67.7%	82.3%	80.8%	No
ST. JOHN'S (NL)	33.2%	58.4%	83.4%	79.6%	52.4%	87.8%	98.2%	67.2%	70.3%	98.4%	Yes
CHARLOTTETOWN (PEI)	90.4%	34.3%	72.9%	77.9%	86.0%	86.0%	75.6%	74.8%	91.9%	90.1%	No
NEW BRUNSWICK	88.8%	84.8%	58.0%	40.7%	42.1%	72.7%	81.6%	78.7%	72.6%	84.1%	Yes
BATHURST	8.3%	38.7%	60.0%	22.6%	60.3%	95.4%	59.1%	78.7%	97.2%	84.2%	Yes
FREDERICTON	99.9%	89.5%	49.3%	39.8%	30.2%	79.9%	84.9%	86.3%	75.7%	94.3%	Yes
MONCTON	N/A	N/A	N/A	N/A	N/A	N/A	98.5%	82.8%	86.8%	61.1%	Yes
SAINT JOHN	94.2%	87.6%	61.5%	42.7%	45.9%	67.1%	73.1%	70.2%	48.4%	99.0%	Yes
NOVA SCOTIA	75.5%	89.8%	64.1%	69.3%	73.3%	70.9%	63.8%	89.7%	79.3%	84.5%	Yes
HALIFAX	N/A	N/A	57.4%	62.2%	84.5%	76.8%	54.1%	92.8%	71.8%	80.5%	Yes
SYDNEY	96.8%	98.1%	80.5%	86.5%	45.3%	52.2%	86.1%	82.3%	93.8%	92.5%	No
QUEBEC	23.9%	28.8%	45.4%	48.7%	65.2%	47.0%	57.0%	36.6%	76.5%	70.4%	Yes
CHICOUTIMI											
JONQUIERE	16.0%	14.3%	49.0%	47.9%	72.2%	64.5%	80.4%	67.8%	91.3%	90.7%	No
MONTREAL	27.7%	27.9%	45.4%	62.0%	69.3%	63.2%	54.2%	32.5%	67.0%	69.5%	Yes
QUEBEC CITY	9.1%	33.8%	44.8%	25.1%	57.3%	18.5%	58.4%	49.7%	78.0%	68.3%	Yes
SHERBROOKE	32.7%	45.9%	45.0%	47.5%	69.4%	41.1%	87.1%	33.8%	86.8%	73.3%	Yes
ONTARIO	62.2%	73.3%	69.4%	62.0%	79.1%	83.7%	74.8%	76.3%	83.9%	77.1%	Yes
KINGSTON	N/A	N/A	N/A	N/A	N/A	N/A	88.7%	90.1%	93.8%	94.4%	No
OTTAWA	40.1%	46.5%	72.1%	55.5%	84.3%	68.6%	97.6%	90.5%	95.8%	91.0%	Yes
ST. CATHARINES	N/A	N/A	N/A	N/A	N/A	N/A	77.1%	80.4%	81.5%	86.5%	Yes
SUDBURY	74.2%	61.1%	80.2%	79.7%	84.1%	59.6%	66.7%	82.4%	80.0%	88.1%	Yes
THUNDER BAY	N/A	N/A	N/A	N/A	N/A	N/A	96.2%	87.6%	84.0%	66.5%	Yes
TORONTO	68.6%	77.3%	67.9%	62.4%	78.5%	87.5%	67.8%	70.3%	75.0%	69.7%	Yes
WINDSOR	63.1%	93.2%	86.5%	63.0%	73.0%	60.0%	97.9%	100.0%	91.8%	94.2%	Yes
MANITOBA	56.5%	76.8%	72.1%	67.7%	83.7%	78.9%	65.2%	90.5%	64.5%	72.0%	Yes
BRANDON	61.0%	69.3%	47.2%	79.8%	92.6%	84.5%	84.9%	73.9%	66.7%	77.2%	Yes
WINNIPEG	56.4%	76.9%	72.3%	67.5%	83.6%	78.8%	63.6%	91.8%	64.2%	71.6%	Yes
SASKATCHEWAN	30.1%	77.8%	66.9%	73.8%	78.9%	81.4%	93.4%	81.7%	76.5%	96.0%	Yes
REGINA	N/A	N/A	58.6%	72.5%	70.7%	80.1%	95.2%	73.0%	93.0%	92.9%	No
SASKATOON	N/A	N/A	74.6%	75.2%	85.9%	82.6%	91.9%	89.0%	64.4%	99.0%	Yes
ALBERTA	60.1%	68.6%	80.3%	75.4%	73.6%	67.3%	87.0%	83.2%	91.8%	84.7%	Yes
CALGARY	42.1%	55.9%	82.6%	82.6%	63.2%	63.0%	95.0%	82.4%	91.7%	90.3%	No
EDMONTON	75.4%	78.7%	78.1%	68.2%	85.4%	71.7%	79.6%	81.0%	89.6%	78.4%	Yes
MEDICINE HAT	95.6%	93.4%	69.4%	62.5%	6.6%	95.6%	89.9%	95.4%	98.4%	88.8%	Yes
RED DEER	N/A	N/A	N/A	N/A	N/A	N/A	81.3%	100.0%	100.0%	78.3%	Yes
BRITISH COLUMBIA	69.2%	74.0%	77.7%	60.3%	59.3%	75.3%	69.3%	84.2%	91.5%	91.8%	No
KELOWNA	53.2%	53.6%	82.9%	87.6%	98.2%	63.8%	100.0%	93.3%	95.7%	94.1%	No
CAMPBELL RIVER											
COURTENAY	100.0%	100.0%	94.5%	86.8%	98.2%	85.1%	97.6%	89.8%	84.5%	78.5%	Yes
VANCOUVER CMA	69.1%	74.0%	77.5%	59.6%	58.2%	75.4%	65.5%	83.2%	91.8%	92.8%	No
VANCOUVER 1	N/A	N/A	N/A	N/A	N/A	N/A	62.2%	81.4%	93.3%	87.1%	Yes
VANCOUVER 2	N/A	N/A	N/A	N/A	N/A	N/A	63.8%	89.3%	93.5%	96.2%	Yes
VANCOUVER 3	N/A	N/A	N/A	N/A	N/A	N/A	71.3%	81.1%	98.6%	94.3%	Yes
VANCOUVER 4	N/A	N/A	N/A	N/A	N/A	N/A	72.3%	81.4%	70.2%	98.2%	Yes

*Note: The study years 1995-2000 were comprised of 25 core cities and 2002-2005 were comprised of 30 core cities. The cities added were Moncton, NB, Kingston, ON, St. Catharines, ON, Thunder Bay, ON, Red Deer, AB. These changes impact the results for the provinces of Alberta, Ontario and New Brunswick.

N/A = Not Applicable, i.e., region was not surveyed for tobacco sales compliance during that year

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table C – Weighted – Sales to Minors Compliance Results by City/Province/Region Based on Retailer Participation in “Operation ID” – 2005

Region	All Stores	% Unwilling to Sell (Compliant) - Stores that do not Participate in "Operation ID"	% Unwilling to Sell (Compliant) - Stores that Participate in "Operation ID"	Compliance Point Difference	Likely that Change is Statistically Significant (Yes/No)
NATIONAL	80.8%	76.4%	87.8%	11.4%	Yes
ST. JOHN'S (NL)	98.4%	100.0%	97.4%	-2.6%	Yes
CHARLOTTETOWN (PEI)	90.1%	96.3%	87.0%	-9.3%	Yes
NEW BRUNSWICK	84.1%	90.7%	79.1%	-11.6%	Yes
BATHURST	84.2%	75.7%	100.0%	24.3%	Yes
FREDERICTON	94.3%	100.0%	92.9%	-7.1%	Yes
MONCTON	61.1%	75.7%	54.1%	-21.6%	Yes
SAINT JOHN	99.0%	100.0%	97.1%	-2.9%	Yes
NOVA SCOTIA	84.5%	85.5%	82.4%	-3.1%	Yes
HALIFAX	80.5%	81.6%	78.6%	-3.0%	Yes
SYDNEY	92.5%	92.2%	93.6%	1.5%	No
QUEBEC	70.4%	68.8%	76.2%	7.3%	Yes
CHICOUTIMI					
JONQUIERE	90.7%	100.0%	90.6%	-9.4%	Yes
MONTREAL	69.5%	69.8%	66.8%	-3.0%	Yes
QUEBEC CITY	68.3%	60.8%	75.5%	14.7%	Yes
SHERBROOKE	73.3%	70.5%	87.9%	17.4%	Yes
ONTARIO	77.1%	70.4%	89.1%	18.7%	Yes
KINGSTON	94.4%	91.8%	96.6%	4.7%	Yes
OTTAWA	91.0%	89.1%	91.9%	2.9%	Yes
ST. CATHARINES	86.5%	79.3%	95.2%	15.9%	Yes
SUDBURY	88.1%	90.9%	87.7%	-3.2%	Yes
THUNDER BAY	66.5%	53.7%	81.3%	27.6%	Yes
TORONTO	69.7%	65.9%	84.1%	18.2%	Yes
WINDSOR	94.2%	93.3%	95.1%	1.7%	No
MANITOBA	72.0%	67.1%	79.6%	12.6%	Yes
BRANDON	77.2%	N/A	77.2%	N/A	N/A
WINNIPEG	71.6%	67.1%	80.3%	13.2%	Yes
SASKATCHEWAN	96.0%	95.7%	100.0%	4.3%	Yes
REGINA	92.9%	92.7%	100.0%	7.3%	Yes
SASKATOON	99.0%	98.8%	100.0%	1.2%	No
ALBERTA	84.7%	79.5%	88.7%	9.2%	Yes
CALGARY	90.3%	88.1%	91.3%	3.2%	Yes
EDMONTON	78.4%	72.5%	87.0%	14.5%	Yes
MEDICINE HAT	88.8%	93.6%	87.3%	-6.3%	Yes
RED DEER	78.3%	89.9%	71.9%	-17.9%	Yes
BRITISH COLUMBIA	91.8%	89.6%	94.0%	4.4%	Yes
KELOWNA	94.1%	89.2%	94.5%	5.4%	Yes
CAMPBELL RIVER					
COURTENAY	78.5%	74.8%	83.6%	8.8%	Yes
VANCOUVER CMA	92.8%	91.0%	94.7%	3.6%	Yes
VANCOUVER 1	87.1%	85.9%	88.6%	2.6%	Yes
VANCOUVER 2	96.2%	92.7%	99.3%	6.6%	Yes
VANCOUVER 3	94.3%	93.8%	94.7%	0.9%	No
VANCOUVER 4	98.2%	96.9%	100.0%	3.1%	Yes

N/A = Not Applicable, i.e., "Operation I.D." was observed in all of Brandon retailers surveyed.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

2. Tobacco Sales-to-Minors Legislation: Compliance with Posting of Tobacco Age Advisory/Health Warning Signs (Tables D & E)

The percentage of retailers in full compliance with the posting of mandatory tobacco age and health advisory signs was 66.4%, an increase over last year (56.5%). This figure represents the weighted percentage of retailers across all 30 cities visited that met every sign compliance condition we measured.

Full compliance is measured by observing all mandatory signs and the absence of non-authorized signs in Saskatchewan. In Nova Scotia, the size of a particular health warning sign is relative to the length of shelf space attributed to tobacco products; shelves under three metres require that the small sign be posted, and the outlets having shelf space for tobacco longer than three metres require a large sign. In Quebec, the federal sign **or** the provincial health warning sign must be present.

Different from previous years, in 2005, observations were made relative to sign positioning; however, they were not taken into consideration when determining sign compliance. Due to the loose interpretation of the law specific to sign positioning, this study measures compliance strictly on the basis of whether the required sign was present or not in the outlet. It is likely for this reason that sign compliance rates have risen over last year. This must be taken into consideration when comparing sign compliance rates in trending graphs.

The largest and most significant increases (i.e., double-digit increases) are from 17 regions. These regions are:

- Chicoutimi/Jonquiere (+76.1 points)
- St. John's (+64.2 points)
- Medicine Hat (+50.4 points)
- Red Deer (+55.3 points)
- Moncton (+43.0 points)
- Bathurst (+33.0 points)
- Ottawa (+28.8 points)
- Campbell River/Courtenay (+23.9 points)
- Kingston (+22.4 points)
- Regina (+21.2 points)
- Sudbury (+19.8 points)
- Montreal (+18.2 points)
- Toronto (+17.0 points)
- Vancouver 4 (+16.4 points)
- Calgary (+15.3 points)
- Kelowna (+14.6 points)
- Vancouver 2 (+10.1 points)

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

These cities represent several provinces and are legislated under a variety of tobacco laws.

There are seven regions where retailer compliance with the posting provisions of the tobacco laws deteriorated over levels in 2004. The largest drops (double digit) occurred in the following regions:

- Saint John (-39.3 points)
- Sydney (-42.7 points)
- Sherbrooke (-23.6 points)
- Charlottetown (-18.0 points)
- Thunder Bay (-16.8 points)
- Halifax (-15.5 points)
- Fredericton (-12.0 points)

The table below records the regions with highest and lowest levels of retailer compliance with the sign provisions of the tobacco laws. Highest compliance was in 10 regions, where the percentage of stores in full compliance was 70% or greater. Lowest compliance was in 16 regions, where the percentage of stores in full compliance was below the national average (i.e., less than 66.4%).

Table D – Weighted – Sign Compliance – Regions Reporting Highest and Lowest Retailer Compliance – 2005

Regions Reporting Highest Sign Compliance (70% or Better)		Regions Reporting Lowest Sign Compliance (Below National Average 66.4%)	
CHICOUTIMI/JONQUIERE	99.1%	HALIFAX	27.3%
MONCTON	91.7%	CHARLOTTETOWN	33.2%
CALGARY	90.3%	KINGSTON	34.7%
ST. JOHN'S	89.9%	SAINT JOHN	44.2%
KELOWNA	87.4%	SHERBROOKE	44.3%
RED DEER	87.2%	OTTAWA	47.5%
BRANDON	85.1%	SYDNEY	50.2%
EDMONTON	78.3%	SUDBURY	52.1%
REGINA	75.9%	MEDICINE HAT	53.5%
ST. CATHARINES	73.9%	WINDSOR	54.6%
		QUEBEC CITY	58.1%
		MONTREAL	60.3%
		TORONTO	60.9%
		BATHURST	63.5%
		SASKATOON	64.1%
		THUNDER BAY	64.5%

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

There is a higher chance of failure to comply when more than one sign is mandatory. In Ontario, for example, the law requires that three different signs be posted. The poor showing in Ottawa, Sudbury, Kingston and Toronto is directly attributable to retailers in these cities routinely posting only two of the three necessary signs, failing mostly to post the "No Smoking" sign also demanded by the law.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table E – Weighted – Retailer Compliance with Mandatory Sign Provisions – 2005

How to Interpret This Table

The figures in the column labelled "Full Compliance" indicate those retailers posting every required sign in the region shown and, in the case of the national figure, across all regions in the country.

Region	Sign Presence					Full Compliance	Sign Observations Not Related to Compliance	
NATIONAL						66.4%		
Newfoundland	Sign A (Health Warning/Age Restriction)					A	In All Required Positions	In Both Languages
ST. JOHN'S	89.9%					89.9%	81.0%	32.8%
Prince Edward Island	Sign A (Health Warning)	Sign B (Age Restriction/Photo I.D.)	Sign C (Age Restriction/Photo I.D.)			A&B&C		
CHARLOTTETOWN	91.3%	52.5%	39.8%			33.2%	36.5%	N/A
New Brunswick	Sign A (Age Restriction)	Sign B (Health Warning)	Sign C (Age Restriction)			A&B&C		
NEW BRUNSWICK	77.8%	83.6%	79.4%			67.6%	66.2%	74.6%
BATHURST	82.1%	93.0%	82.1%			63.5%	92.1%	92.1%
FREDERICTON	75.9%	82.4%	71.0%			67.8%	70.7%	69.3%
MONCTON	93.6%	93.6%	96.6%			91.7%	92.4%	96.6%
SAINT JOHN	61.9%	71.7%	67.9%			44.2%	28.5%	51.7%
Nova Scotia	Sign A (Health Warning/Age Restriction)	Sign B (Health Warning/Age Restriction/Photo I.D.)	Sign C (Health Warning/Age Restriction/Photo I.D.)	Sign D (Health Warning - small)	Sign D (Health Warning - large)	A&B&C + one of D		
NOVA SCOTIA	84.0%	71.8%	60.7%	57.7%	65.1%	34.8%	46.8%	N/A
HALIFAX	76.9%	65.1%	50.9%	51.7%	62.2%	27.3%	37.6%	N/A
SYDNEY	98.4%	85.6%	80.9%	70.0%	70.9%	50.2%	65.6%	N/A
Quebec	Sign A (Federal - Age Restriction)	Sign B (Health Warning/Age Restriction)				A or B		
QUEBEC	57.1%	28.5%				60.9%	17.7%	41.5%
CHICOUTIMI								
JONQUIERE	99.1%	0.0%				99.1%	0.0%	0.9%
MONTREAL	59.7%	26.1%				60.3%	16.7%	48.8%
QUEBEC CITY	38.7%	48.5%				58.1%	29.7%	23.4%
SHERBROOKE	44.3%	12.7%				44.3%	1.9%	31.6%
Ontario	Sign A (Health Warning/Age Restriction)	Sign B (Age Restriction)	Sign C (No Smoking)			A&B&C		
ONTARIO	82.3%	79.5%	71.3%			58.8%	47.5%	19.9%
KINGSTON	75.3%	77.2%	50.0%			34.7%	34.7%	0.0%
OTTAWA	92.0%	87.9%	53.0%			47.5%	37.8%	15.6%
ST. CATHARINES	92.2%	86.5%	87.0%			73.9%	71.5%	32.5%
SUDBURY	97.2%	87.1%	58.6%			52.1%	42.0%	4.4%
THUNDER BAY	94.0%	79.0%	77.6%			64.5%	63.4%	10.1%
TORONTO	77.4%	76.3%	73.4%			60.9%	44.9%	23.5%
WINDSOR	81.1%	77.8%	84.6%			54.6%	62.4%	0.0%
Manitoba	Sign A (Federal - Age Restriction)					A		
MANITOBA	70.7%					70.7%	67.5%	70.7%
BRANDON	85.1%					85.1%	62.4%	85.1%
WINNIPEG	69.4%					69.4%	68.0%	69.4%
Saskatchewan	Sign A (Health Warning/Age Restriction/Photo I.D.)	Absence of Other Non-Authorized Signs Posted				A & Absence of Non-Authorized		
SASKATCHEWAN	91.2%	77.5%				69.8%		N/A
REGINA	90.8%	84.7%				75.9%		N/A
SASKATOON	91.5%	70.7%				64.1%		N/A
Alberta	Sign A (Age Restriction)					A		
ALBERTA	83.2%					83.2%	80.9%	83.2%
CALGARY	90.3%					90.3%	86.1%	90.3%
EDMONTON	78.3%					78.3%	77.1%	78.3%
MEDICINE HAT	53.5%					53.5%	57.2%	53.5%
RED DEER	87.2%					87.2%	87.2%	87.2%
British Columbia	Sign A (Health Warning)	Sign B (Health Warning/Age Restriction/Photo I.D.)				A&B		
BRITISH COLUMBIA	82.3%	81.6%				70.2%	80.2%	N/A
KELOWNA	90.3%	97.2%				87.4%	92.6%	N/A
CAMPBELL RIVER								
COURTENAY	95.6%	72.6%				69.2%	95.6%	N/A
VANCOUVER CMA	80.5%	81.0%				68.8%	77.8%	N/A
VANCOUVER 1	70.5%	82.1%				65.8%	65.9%	N/A
VANCOUVER 2	87.7%	89.2%				79.9%	87.5%	N/A
VANCOUVER 3	83.7%	70.4%				59.6%	82.3%	N/A
VANCOUVER 4	86.2%	84.5%				75.1%	80.5%	N/A

N/A = Not applicable, i.e., not observed.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

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3. Retail Advertising at Point of Sale (POS) (Table F)

Data on tobacco point-of-sale (POS) advertising permitted under the *Tobacco Act* was collected for this study. The information summarized in this section was based on the presence of advertising bearing printed trademarks, logos or brand names belonging to tobacco companies. For the purpose of this study, we have reported on observations of danglers, posters, counter-top displays and shelf-talkers separately; all other forms of ads observed are reported in a category called "other ad types". Sponsored event ads void of such trademarks, logos or brand names were excluded from the calculations.

Nationally, we found in-store tobacco-related advertising elements in more than forty percent (40.7%) of stores (*Chart 16*). This is a weighted figure and is an estimate of conditions we likely would have found had all stores in the universe been visited, not just a sample of stores. This distribution figure represents a decrease from the last two years but higher still than 2002 (32.7%). Although the average number of ads found in those stores with ads has decreased slightly from last year (3.3 pieces this year over 3.8 pieces in 2004), the indication is that tobacco manufacturers are getting exposure with POS support behind their brands.

Where counter-top displays used to be the most widely distributed tobacco brand advertising medium, in 2005, both counter-top displays and shelf-talkers were found in equal quantity (15%) of all stores surveyed (*Table 21*). While the number of stores supporting posters and "other ad types" have increased slightly in the last year, danglers, shelf-talkers and counter-top displays were observed less often than last year.

The regions where tobacco ad distribution increased the most are listed in *Table 22*. In the five of the regions (Charlottetown, Quebec City, Red Deer, Kelowna and Brandon), distribution jumped by more than 25% this year.

The highest distribution was found in five regions where over 60% of the outlets surveyed carried some form of tobacco advertisement: Red Deer, Brandon, Chicoutimi/Jonquiere, Saint John, and Sydney.

The weakest recorded number of observations in 2005 were in the following regions: Regina, Saskatoon and St. Catharines.

Small surface retail stores (chain and independent convenience and gas stores/kiosks) remain more likely than larger surface stores to carry tobacco POS merchandising materials. Almost two-thirds (64.3%) of chain convenience nationally carried POS advertising, followed by gas stores/kiosks (46.4%) and independent convenience stores (44.5%) (*Table 26*).

Nationally, the percentage of stores carrying tobacco ads has decreased across all store types, except grocery, which recorded a marginal increase of 1.3% more ads.

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No statistically meaningful difference exists regarding the availability of tobacco advertising based on the proximity of stores to schools and/or malls nationally. Across all cities, ad distribution was 36.5% in stores closest to schools/malls and 38.7% in stores further than 300 metres away.

Among stores with ads, the average number of tobacco POS ad pieces carried was 3.3 pieces per store, down from 3.8 pieces a year ago (*Chart 18*).

The table below summarizes the cities with the highest and lowest levels of tobacco POS ad distribution, as well as the change in distribution over 2004.

Table F – Weighted – All Stores – Changes in POS* Ad Distribution Across Regions – 2005 vs. 2004 Results % of Stores with Ads (Cities with 0.0% indicate no ad distribution)

Cities Where Tobacco Ad Distribution is Highest	2004	2005	Diff 2005 vs. 2004
RED DEER	47.7%	95.3%	47.6%
BRANDON	64.1%	90.7%	26.6%
CHICOUTIMI/JONQUIERE	66.7%	83.8%	17.1%
SAINT JOHN	58.2%	72.2%	14.0%
SYDNEY	84.4%	71.4%	-13.0%
QUEBEC CITY	11.6%	59.6%	48.0%
CALGARY	51.1%	59.6%	8.5%
Cities Where Tobacco Ad Distribution is Lowest	2004	2005	Diff 2005 vs. 2004
WINNIPEG	55.9%	20.7%	-35.2%
VANCOUVER 1	21.3%	19.2%	-2.1%
MEDICINE HAT	9.4%	16.0%	6.6%
VANCOUVER 2	27.0%	12.4%	-14.6%
ST. CATHARINES	63.0%	7.8%	-55.2%
REGINA	50.8%	0.0%	-50.8%
SASKATOON	56.9%	0.0%	-56.9%

*Point-of-Sale

Point of Sale

CRG monitored POS advertising by tobacco brand in chain convenience, independent convenience and gas stores/kiosks. The following brand-related observations hold for these classes of trade:

- Nationally, the brand with the greatest distribution was du Maurier, with ads available in 35.1% of chain convenience outlets, 22.2% of gas stores/kiosks and 21.1% of independent convenience outlets;

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- distribution for all "Other" brands (not separately specified) was actually second highest than that for any other single brand across each of these classes of retail trade;
- the share of ads enjoyed by tobacco brands across cities and trade classes coincided closely with the percent of stores carrying each brand;
- the top four single brand share of ads are du Maurier, Players, Export A and Benson & Hedges in chain convenience; du Maurier, Export A, Players and Canadian Classics in independent convenience and gas stores/kiosks;
- the highest recording of brand share of ads was in the "Other" category. The second highest single brand share of ads goes to du Maurier, with 11.3% in gas stores/kiosks, 11.0% in chain convenience and 9.7% in independent convenience;
- within each store type, stores with ads now carried more than three ads, on average, per store. In each trade class the average number of ads carried is now marginally lower in 2005 than in 2004. Chain convenience stores with ads carried the largest number of ads; 3.6 ads on average. Independent convenience carried an average of 3.3 ads and gas stores/kiosks carried 3.2; and
- among these three classes of trade, the counter-top displays are the most widely distributed. Posters are the second most popular in chain convenience and independent convenience. Shelf-talkers are second most popular in gas stores/kiosks.

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Introduction

Preface

This is the latest in a series of annual studies designed to evaluate the behaviour of retailers towards youth access-to-tobacco restrictions. Health Canada has been using independent researchers since 1995 to evaluate retailer behaviour towards youth access restrictions of the federal and provincial tobacco laws.

The federal *Tobacco Act* sets the minimum federal standards in Canada, prohibiting the furnishing of tobacco products to minors. Among key provisions, the legislation makes it illegal for retailers to furnish tobacco products to anyone under the age of 18 and provides for defence of due diligence for retailers who require photo identification to confirm a customer's age. The Act also restricts the distribution of advertising and sets minimum mandatory sign requirements at point of sale.

Individual provinces have in place their own regulations prohibiting the sale of tobacco products to minors. These may stipulate rules for the display of tobacco products differently from the federal minimum, may require sign-posting requirements different from the federal provision, and may restrict the sale of tobacco products to minors older than 18. Indeed, except for Quebec, Manitoba, Alberta and Saskatchewan, retailers in all other provinces are restricted by local law from selling tobacco products to anyone under 19 years of age.

At the time of this research, Alberta, Manitoba and Quebec were the last remaining provinces where tobacco retailers are monitored against the basic federal guidelines, even though Quebec put its own tobacco legislation in place several years ago. Observers in these three provinces were instructed to monitor retailer compliance consistent with the age and sign provisions of the federal *Tobacco Act*. Any additional signs were noted, if found.

In March 2002, Saskatchewan's *Tobacco Control Act* took effect and removed retail displays from stores. The law required vendors to use curtains and cabinets to hide cigarettes, cigars and chewing tobacco behind the counter, or ban minors from their stores. This is referred to as "the power wall". Although the power wall was challenged in the Saskatchewan Court of Appeal last year, it was not passed. Therefore, after a brief reprieve from the enforcement of the law in 2004, the law was re-instated in January 2005. Retailer visits in Saskatchewan for 2005 reverted back to the manner in which they were conducted in 2003 and 2002. Manitoba also adapted a similar new legislation in 2005.

This study was designed to permit direct comparisons with the results of last year and, as much as possible, with similar data collected in years prior. As such, the current data

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can be compared reliably with past results. Where adjustments to the sample were made or where legislative changes necessitated adjustments to work requirements, these differences affecting the historical trend are noted at the appropriate places in this document.

Research Objectives

Health Canada's fundamental objective in commissioning this research is to maintain and enhance the health and safety of young Canadians. The data we have collected is strictly for information and evaluation purposes and has not been commissioned for purposes of enforcement.

The work is important within the context of the Federal Tobacco Control Strategy (FTCS). The FTCS embodies the federal government's latest initiatives to combat tobacco use in Canada. Among these, it sets clear and ambitious ten-year targets for tobacco control, including the goal of increasing retailer compliance with tobacco-sales-to-youth laws to 80%. The FTCS specifies the on-going annual evaluation of retailer compliance as one of five strategic objectives for the coming years. The findings from the current study build on the results of annual retailer behaviour measurements since 1995, at the same time establishing new benchmarks against which future progress can be measured and compared.

This year's study had three specific measurement objectives in mind:

1. To monitor the behaviour of retailers relative to the sales-to-minors provisions of the *Tobacco Act* and related provincial legislation, including aspects of the laws relating to the posting of mandatory age restriction/health-warning signs;
2. To collect information on tobacco point-of-sale (POS) merchandising; and
3. To determine the in-store presence of "Operation ID" displays.

Under each individual objective, estimates were collected of the following:

1. Sales-to-Minors and Sign-Posting Provisions of the Tobacco Laws
 - number and percent of retailers refusing to sell tobacco to persons under legal age;
 - number and percent of retailers asking customers for proper identification as required by the law;
 - number and percent of retailers posting all mandatory age advisory and/or health-warning signs prescribed by the law;

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- number and percent of retailers posting each of these signs in the proper manner and location prescribed by the law, although position was not taken into account for compliance; and
 - number and percent of retailers in partial or complete non-compliance with the sign-posting provisions of applicable federal or provincial laws, including provinces where some signs are unauthorized to be posted, with an indication of the number and percent of retailers posting which signs by type.
2. Retail Point-of-Sale (POS) Merchandise
- in all trade classes, point-in-time information regarding the distribution, number and type of retail POS materials in support of the tobacco category as a whole; and
 - in convenience stores (both chain and independent) and gas stores/kiosks, the above-indicated POS measures by brand as follows: Belvedere, Benson & Hedges, Canadian Classics, du Maurier, Export A, Export A Smooth, Remaining Export A, Matinee, Players, Rothmans, Sportsman, "Other".
3. "Operation ID" Displays
- the number and percentage of establishments displaying "Operation ID" POS material of any sort.

Methodology

Teams made up of two Corporate Research Group observers, one a minor (15, 16 or 17 years of age) and the other an adult over 19 years of age, were sent into a randomly selected, stratified sample of 5,561 retail establishments in 30 cities and towns across Canada. Stores were visited over 13 weeks, from June 24, 2005 to August 23, 2005.

Team members entered stores at different times. They gave no indication of being together. Each carried out specifically assigned tasks:

- The responsibility of the teen researcher was to gauge the willingness of retailers to sell him/her tobacco by actually attempting to buy a 20 or 25 size pack of name-brand cigarettes. The teenagers did not carry identification. During the attempted transaction, minors made no misleading statements other than if asked their age. If asked their age, they were not truthful, but rather claimed to be 18 or 19 years old, depending on the minimum age requirements of that province. Under no circumstances did they make a purchase. They were given clear instructions about how to casually back out of any attempted sale; and

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- The senior member of the research team was responsible for supervising the younger partner and for carrying out a visual inspection of the retailer's place of business for the purpose of observing and recording compliance with the posting of mandatory signs under the federal *Tobacco Act* or similar provincial legislation. These people were also responsible for collecting information on in-store tobacco advertising and promotions and "Operation ID" displays.

In order to measure the influence of age and gender on retailers' propensity to comply with sales-to-minors legislation, visits were organized so as to ensure the following minimum national requirements:

- that store visits were conducted by a mix of both male and female teens in roughly equal proportions; and
- that approximately half of all store visits were completed by a minor 17 years of age, with the rest of the sample being divided about equally between 15 and 16 year olds.

These distribution targets are the same as those established for studies conducted since 1998.

As much as possible, we tried to respect these targets within individual cities and across retail classes of trade. However, as in past years, there were cities and store types this year where the number of sample stores was too small to accommodate a full mix of boys and girls across each age group. In these cases, the sample was assigned to one or more teens of pre-determined age and gender. The distributions were similar to the criteria used in the last study of this type, in 2004.

Table i confirms national completion rates by age and gender of teen researchers for the current study and preceding ones to 2002.

Table i – National Sample Dispersion by Age and Gender of Teen Researcher

	2002	2003	2004	2005
Sample Size (# Store Visits)	5,550	5,452	5,516	5,561
Male	49.4%	49.6%	49.7%	50.1%
Female	50.6%	50.4%	50.3%	49.9%
15 year olds	23.7%	23.8%	24.7%	26.6%
16 year olds	29.3%	29.4%	24.4%	26.5%
17 year olds	46.9%	46.8%	50.9%	46.9%

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Scope

Retail stores in 30 urban markets were visited. Twenty-five of the 30 cities have been included in the study since 2002. The list of all cities includes at least one city from each province in Canada.

Sample

A targeted national sample of retailers was selected from best-available universe estimates across each of the chosen cities. A completely new sample was randomly chosen for the latest study.

The sample frame was designed to ensure equal chances of representation for retailers in each of five classes of trade:

- Chain convenience
- Gas stores/kiosks
- Grocery
- Independent convenience
- Pharmacies

Sample selection was guided by defined statistical procedures used in previous studies to select samples the first time in each city:

- for each city and for each trade class, the sample frame was organized by banner where appropriate and geographically distributed across each city based on postal codes. The frame was then divided into sub-strata requiring a minimum sample of one, and a store was randomly selected from each sub-stratum;
- our intent was to sample no fewer than 50 stores from each class of trade per city. In those cases where the universe consisted of fewer than 50 stores, all of the stores available were chosen for our sample; and
- in cities in provinces where pharmacies were prohibited by law from selling tobacco, pharmacies were excluded from the sample frame.

In all cities for 2005, our sampling objective was to match sample distributions by city and class of trade as closely as possible to those established in previous years. Samples were drawn to ensure representation of the census metropolitan area (CMA) of the largest cities. For Vancouver, it was requested that statistically reliable measures be provided for the entire CMA and separately for each of four different health territories. This required the area to be over-sampled. The four health regions within the Greater Vancouver Area were defined by the boundaries of communities as follows:

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Region 1	Region 2	Region 3	Region 4
Vancouver	Burnaby	Delta	North Vancouver
Richmond	Coquitlam	Surrey	West Vancouver
	Port Moody	Langley	
	Port Coquitlam	North Delta	
	Maple Ridge	White Rock	
	Whonnock		
	Pitt Meadows		
	New Westminster		

Once fieldwork began, some selected sample stores were found to have closed or to no longer be selling tobacco products. In these cases, CRG staff replaced the stores with other retail establishments of the same type located in close proximity to the original store(s). When additional stores of the same type that sold tobacco could not be found, the original sample store was replaced by a store from another class of trade in the same area.

In the end, we completed visits to 5,561 stores, geographically dispersed largely in a manner consistent with our pre-established targets. *Table ii*, at the end of this section, shows the actual number of completes across the nation.

Sample Weighting

Due to the stratified random sample, five class trades per region, raw level data from our sample outlets has been weighted statistically to reflect the distribution of total outlets, in the universe within the 30 communities and, subsequently, the provinces and across the country. Weighted data is an estimate of conditions we likely would have found had we visited every retail outlet in the 30 cities instead of just the outlets in our sample. In no instance has an attempt been made to project results beyond the retail universe in the urban areas sampled.

Unless otherwise mentioned, all the percentages quoted in this report are results after weightings have been applied.

NOTE: Readers attempting to replicate weighted percentage figures using raw sample sizes will yield different results from those generally reported.

Understanding this Report

The survey is not intended as a rating of cross-jurisdictional performance. The design of this research is intended to yield reasonable estimates of retailer compliance under specified conditions at the national level. The regional data is useful for understanding

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the national trend, but one must be careful about drawing comparisons between regions.

For practical reasons, it was not possible to impose in all cities the same controls for age and gender of teens that we did nationally. *This will affect the results in the regions.* At the regional level, the findings should be used for other things:

- to debate best practices between regions;
- to track the progress and general direction of retailer compliance with the tobacco laws over ten surveys since 1995;
- to learn from the national results what variables motivate retailer behaviour; and
- to consider ways to apply these lessons in the provinces.

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Table ii – Sample Dispersion by Class of Trade – 2005

Region	All Store Classes	Chain Convenience	Gas Stores/Kiosks	Grocery	Independent Convenience	Pharmacies
NATIONAL	5561	995	1521	859	1824	362
ST. JOHN'S (NL)	194	16	42	24	92	20
CHARLOTTETOWN (PEI)	90	12	34	11	33	N/A
NEW BRUNSWICK	294	24	81	27	162	N/A
BATHURST	36	0	10	3	23	N/A
FREDERICTON	82	4	23	6	49	N/A
MONCTON	78	12	21	9	36	N/A
SAINT JOHN	98	8	27	9	54	N/A
NOVA SCOTIA	375	35	100	22	218	N/A
HALIFAX	248	23	64	12	149	N/A
SYDNEY	127	12	36	10	69	N/A
QUEBEC	933	183	241	190	319	N/A
CHICOUTIMI						
JONQUIERE	126	12	32	18	64	N/A
MONTREAL	367	96	100	90	81	N/A
QUEBEC CITY	333	58	80	68	127	N/A
SHERBROOKE	107	17	29	14	47	N/A
ONTARIO	1279	330	351	208	390	N/A
KINGSTON	82	16	21	8	37	N/A
OTTAWA	216	55	69	45	47	N/A
ST. CATHARINES	236	68	56	22	90	N/A
SUDBURY	109	17	35	17	40	N/A
THUNDER BAY	74	18	26	4	26	N/A
TORONTO	412	102	102	104	104	N/A
WINDSOR	150	54	42	8	46	N/A
MANITOBA	332	58	91	58	82	43
BRANDON	38	4	19	6	8	1
WINNIPEG	294	54	72	52	74	42
SASKATCHEWAN	314	43	122	38	57	54
REGINA	154	18	62	20	29	25
SASKATOON	160	25	60	18	28	29
ALBERTA	790	176	188	129	163	134
CALGARY	343	89	75	45	83	51
EDMONTON	339	76	78	68	54	63
MEDICINE HAT	64	5	24	9	13	13
RED DEER	44	6	11	7	13	7
BRITISH COLUMBIA	960	118	271	152	308	111
KELOWNA	93	9	44	12	18	10
CAMPBELL RIVER						
COURTENAY	72	8	22	12	23	7
VANCOUVER CMA	795	101	205	128	267	94
VANCOUVER 1	239	44	52	37	73	33
VANCOUVER 2	215	28	59	34	70	24
VANCOUVER 3	229	24	64	41	76	24
VANCOUVER 4	112	5	30	16	48	13

N/A indicates that the store type is not represented within the respective region.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

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Part A – Tobacco Sales-to-Minors Legislation

Section 1.0 – Tobacco Sales to Minors

Total retailer compliance results in regards to those provisions of sales-to-minors legislation prohibiting the sale of tobacco products to underage youth are as follows.

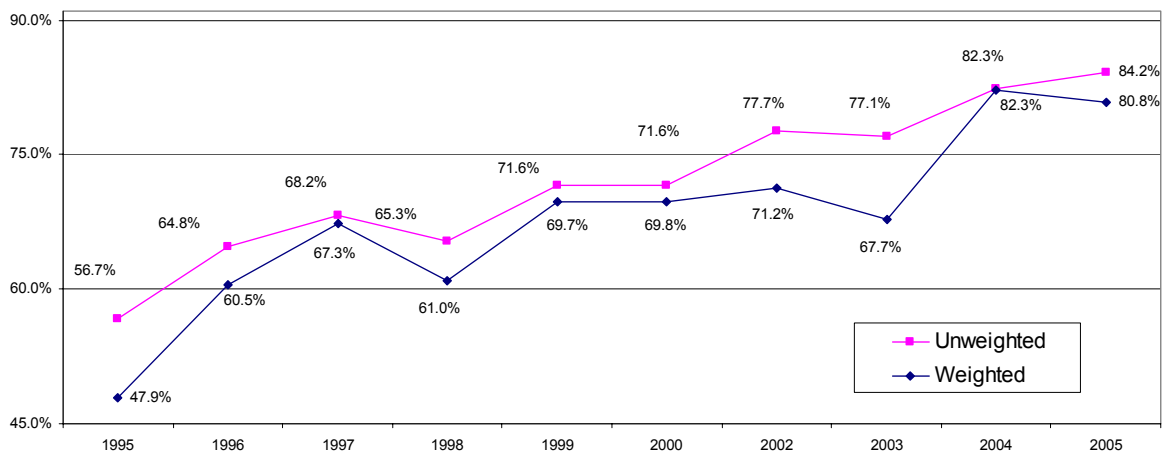
1.1 National Results

Weighted retailer national compliance for all outlets visited in 2005 is 80.8%, only 1.5% lower than last year's compliance level of 82.3% (*Chart 1*). National trend comparisons, i.e., 2005 to 2004 are accurate +/- 2%, 19 times out of 20 at the 95% confidence level, making the difference from this year to last statistically insignificant. The **raw unweighted results** indicate an increase in compliance levels of 1.9% from 82.3% last year to 84.2% this year.

In regards to the raw data, the trend for retailers refusing to sell to minors is showing a steady increase from as far back as 1998 with only an insignificant drop in 2003 by 0.6% from the previous year.

The difference between the raw and weighted data indicates that those areas having a greater impact or weight, i.e., large cities or regions, on the national results performed less desirably than those not having considerable weight. Regional data later in this report will highlight the differences.

Chart 1 – % Retailers Refusing to Sell to Minors: National – All Outlets*

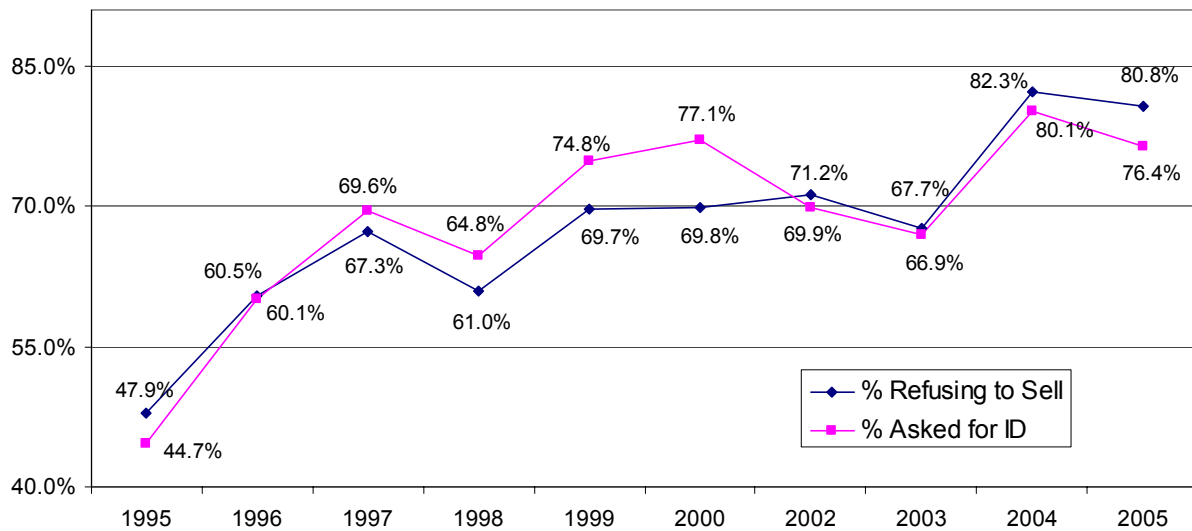


*Note: 1995-1996 and 2002 data are from surveys using similar, but not identical methodology to that used in 1997-2000 and 2003-2005. Caution should be exercised when analyzing results for comparative purposes.

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The relationship between compliance levels and retailers asking for ID remains close (*Chart 2*) the difference between compliance and asking for ID is less than 5%. The weighted average of retailers asking for ID has declined by 3.7% from 80.1% in 2004 to 76.4% in 2005. The increasing compliance levels over the last two years, coupled with the rate of retailers asking for ID, indicate a direct correlation between retailer policing and compliance levels.

Chart 2 – Weighted – Compliance Trend and % Retailers Asking for ID: National – All Outlets*



*Trend data are from surveys using similar, but not identical, methodology over time. View comparisons with appropriate caution.

Table 1 – Weighted – Findings Related to Request for Proof of Age – 2002-2005: National – All Outlets

	2002	2003	2004	2005
% Retailers Asking for ID	69.9%	66.9%	80.1%	76.4%
% Retailers Not Asking for ID	30.1%	33.1%	19.9%	23.6%
Retailers Who Refused to Sell as % of Those Asking for ID	96.0%	97.1%	96.9%	97.9%
Retailers Who Were Willing to Sell as % of Those Asking for ID	4.0%	2.9%	3.1%	2.1%
Retailers Who Were Willing to Sell as % of Those Not Asking for ID	86.4%	91.5%	76.5%	74.8%
Retailers Who Refused to Sell as % of Those Not Asking for ID	13.6%	8.5%	23.5%	25.2%

1.1.1 National Results by Age of Minor

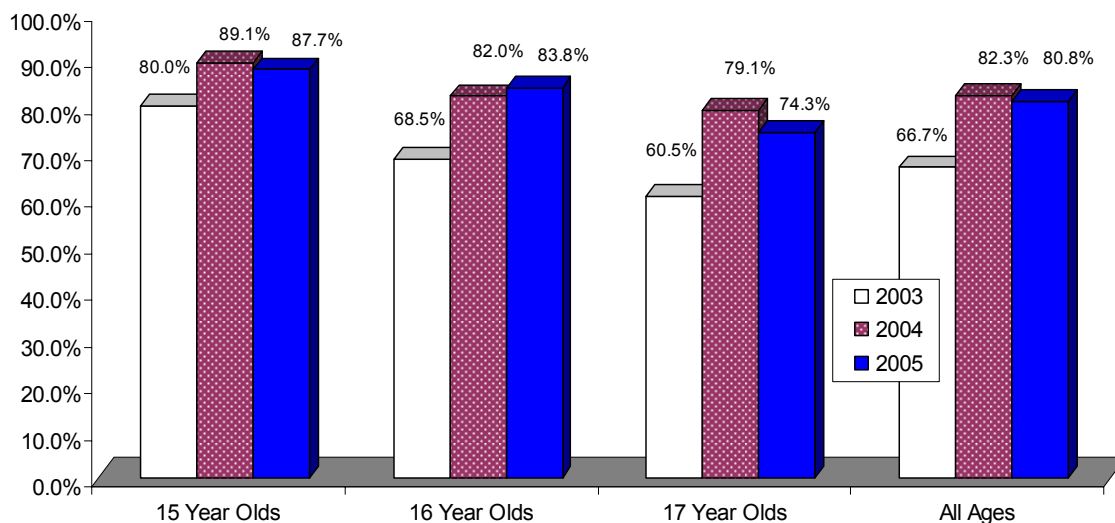
The trend continues (*Chart 3*) from previous years as retailers continue to refuse tobacco to younger teens (15 and 16 year olds) at a greater rate than older teens (17 year olds). The difference between 15 year olds and 16 year olds is marginal at

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approximately 4%, with the largest drop in compliance when retailers are approached by 17 year olds. Compliance levels drop by 13.4% between 15 year olds and 17 year olds and 9.5% between 16 year olds and 17 year olds.

Seventeen year olds represented about 47% of the minors, therefore having a greater effect on the overall compliance levels than the other minor age groups individually (27% fifteen year olds and 26% sixteen year olds).

Chart 3 – Weighted – Sales Compliance Results by Age of Minor: National – All Outlets – % Retailers Refusing Tobacco to Minors



Retailers asking for ID by age of minor results are similar to compliance levels by age of minor, however, with tighter margins between the age groups (see Table 2). The results indicate that retailers are more likely to ask younger teens for ID than older teens by a very narrow margin between 15 year olds and 16 year olds (3.9% lower for 16 year olds) and a statistically significant variance between 17 year olds and the younger teens (13.4% lower for 17 year olds).

Compliance levels are almost 100% when ID was asked for by the retailers and less than 50% when ID was not asked for, indicating a direct correlation between retailer policing (asking for ID) and compliance levels. Retailers are more likely not to sell to 15 year olds when not asking for ID than they are to 16 and 17 year olds combined. These results are in line with last year's².

² Compliance levels where retailers did not ask for ID last year were 44.5% - 15 year olds, 19.9% - 16 year olds, and 17.5% - 17 year olds.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

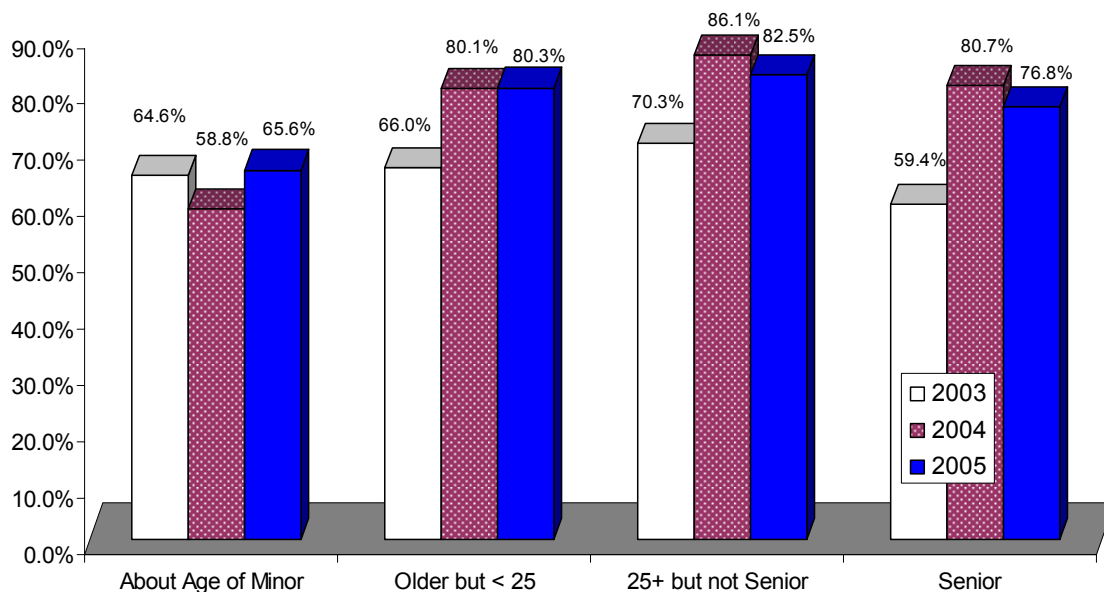
Table 2 – Weighted – Findings Related to Request for Proof of Age by Age of Minor – 2005: National – All Outlets

Age of Minor	15 Year Olds	16 Year Olds	17 Year Olds
% Retailers Refusing to Sell	87.7%	83.8%	74.3%
% Retailers Asking for ID	80.4%	79.7%	71.9%
% Retailers Not Asking for ID	19.6%	20.3%	28.1%
Retailers Who Refused to Sell as % of Those Asking for ID	97.6%	97.9%	98.2%
Retailers Who Were Willing to Sell as % of Those Asking for ID	2.4%	2.1%	1.8%
Retailers Who Refused to Sell as % of Those Not Asking for ID	47.2%	28.5%	13.3%

1.1.2 National Results by Age of Clerk

Compliance levels where the clerk is roughly the same age as the minor increased over last year's lower performance of 58.8% but returned to the compliance level measured in 2003 (*Chart 4*). Also reversing the trend are clerks older than 25 years old, where compliance levels dropped from last year, however, remaining higher than the previous year. Clerks older than the minor but younger than 25 have maintained a compliance level approximately the same as last year's.

Chart 4 – Weighted – National – All Outlets – % Retailers Refusing to Sell to Minors by Age of Clerk



Ninety one percent of the clerks sampled were older than the minor but not a senior citizen and falling within the two middle age categories (33% - "Older but < 25", 58% - "25+ but not Senior"). The rates of refusal for the clerks in these two age categories are close to the national mean of 80.8%.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Remaining consistent with compliance levels is the rate of retailers asking for ID where clerks 25 or older, but not a senior citizen, have the highest rate. This age group of clerks has the highest level of compliance whether ID is asked for or not, with the exception of those clerks older than the minor but less than 25 who had roughly the same level of compliance when ID was asked for.

Table 3 – Weighted – Findings Related to Request for Proof of Age of Clerk – 2005 – National – All Outlets

	Age of Clerk	About Age of Minor	Older but < 25	25+ but not Senior	Senior
% Retailers Refusing to Sell		65.6%	80.3%	82.5%	76.8%
% Retailers Asking for ID		63.4%	76.4%	77.4%	76.2%
% Retailers Not Asking for ID		36.6%	23.6%	22.6%	23.8%
Retailers Who Refused to Sell as % of Those Asking for ID		96.9%	98.1%	98.0%	96.7%
Retailers Who Were Willing to Sell as % of Those Asking for ID		3.1%	1.9%	2.0%	3.3%
Retailers Who Refused to Sell as % of Those Not Asking for ID		11.5%	22.5%	29.6%	13.2%

1.1.3 National Results by Gender of Minor

Results by Gender of Minor

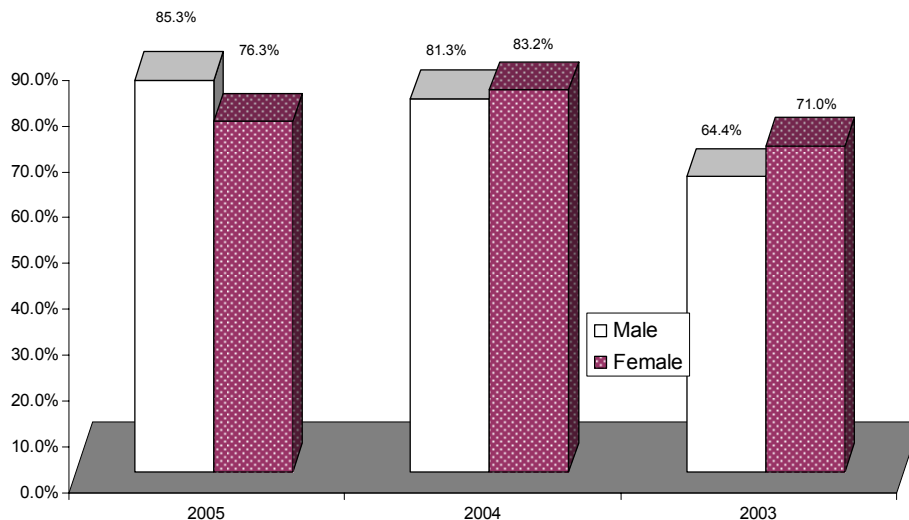
Retailers in 2005 were more willing to sell tobacco to female minors than to male minors by a similar margin once experienced by males over females in previous surveys (*Chart 5*).

The compliance level among male minors has consistently increased since 2003; however, it is the female minor compliance levels that have decreased significantly from last year's result, but they are still significantly better than 2003.

The average of these two compliance levels equals the national mean, indicating a neutral weighting effect on the overall results. This is likely due to the equal number of female and male minors used and the proportionate distribution of them across the regions.

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Chart 5 – Weighted – % Retailers Indicating Refusal to Sell Results by Gender of Minor – Trended



In both cases (*Table 4*) male and female minors were refused tobacco in almost every instance where they were asked for ID by the retailer. This statistic contributes to the continued higher compliance levels among the male minors since they were asked for ID in more instances (80.2%) than were the female minors (72.8%).

Table 4 – Weighted – Findings Related to Request for Proof of Age by Gender of Minor – 2005 – National – All Outlets

	Gender of Minor	
	Male	Female
% of Retailers Refusing to Sell	85.3%	76.3%
% of Retailers Asking for ID	80.2%	72.8%
% of Retailers Not Asking for ID	19.8%	27.2%
Retailers Who Refused to Sell as % of Those Asking for ID	98.6%	97.2%
Retailers Who Were Willing to Sell as % of Those Asking for ID	1.4%	2.8%
Retailers Who Refused to Sell as % of Those Not Asking for ID	31.6%	20.7%

Results by Gender of Clerk

Compliance levels among male clerks dropped this year to 77.5% from last year's 80.5%, while compliance levels among female clerks remained unchanged and higher than their male counterparts (*Table 5*). The compliance level drop among male clerks is likely due to fewer of them asking for ID (72.4%) from last year (79.0%).

Compliance levels among those asking for ID remained relatively unchanged (difference is statistically not significant) from last year, showing high results above 95%.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 5 – Weighted – Compliance Indicators by Gender of Retail Clerk – National – All Outlets – Trended

Year	% Refused to Sell		% Who Asked for ID		% of Those Asking for ID Who Did Not Sell	
	Male	Female	Male	Female	Male	Female
2005	77.5%	83.8%	72.4%	80.1%	97.3%	98.4%
2004	80.5%	83.8%	79.0%	81.1%	96.2%	97.5%
2003	65.7%	69.4%	64.2%	69.0%	97.7%	96.7%
2002	68.6%	73.2%	67.7%	71.7%	94.2%	97.3%

1.1.4 National Results by Proximity to Schools and/or Malls

Teens tend to spend much of their time either near a school or mall, making compliance levels of those retailers selling tobacco products in those areas of particular concern. Tobacco retailers within a 300-metre radius of a school or mall are considered to be in “proximity” and are therefore included as such. Only 38.8% of the total retailers surveyed this year were near a school or mall compared to last year where 48.0% of all outlets were near a school or mall. The reason for this difference in distribution of retailers is that each year the sample of retailers selected for this survey is random.

Retailers near a school or mall had compliance levels higher (but not significantly different) than the national average with those retailers elsewhere having compliance levels slightly lower, but again not significantly different (see Table 6). This continues the trend started last year where retailers near schools or malls have a higher compliance level than elsewhere.

Table 6 – Weighted – Compliance Indicators by Proximity to Schools/Malls – National – All Outlets – Trended

Year	% Refused to Sell		% Who Asked for ID	
	Near School/Mall	Elsewhere	Near School/Mall	Elsewhere
2005	82.7%	79.7%	79.6%	74.7%
2004	83.4%	81.2%	82.2%	78.2%
2003	66.1%	69.0%	66.3%	67.3%
2002	74.0%	68.8%	72.6%	67.7%

Although compliance levels remain high, the rate of retailers asking for ID has dropped from last year, indicating the retailers' willingness to refuse a sale to a minor without the need to ask for ID.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.1.5 National Results by Time of Visit

Results by Time of Day

Compliance results were collected to determine if retailers were more or less willing to sell tobacco to minors based on time of day (*Chart 6*).

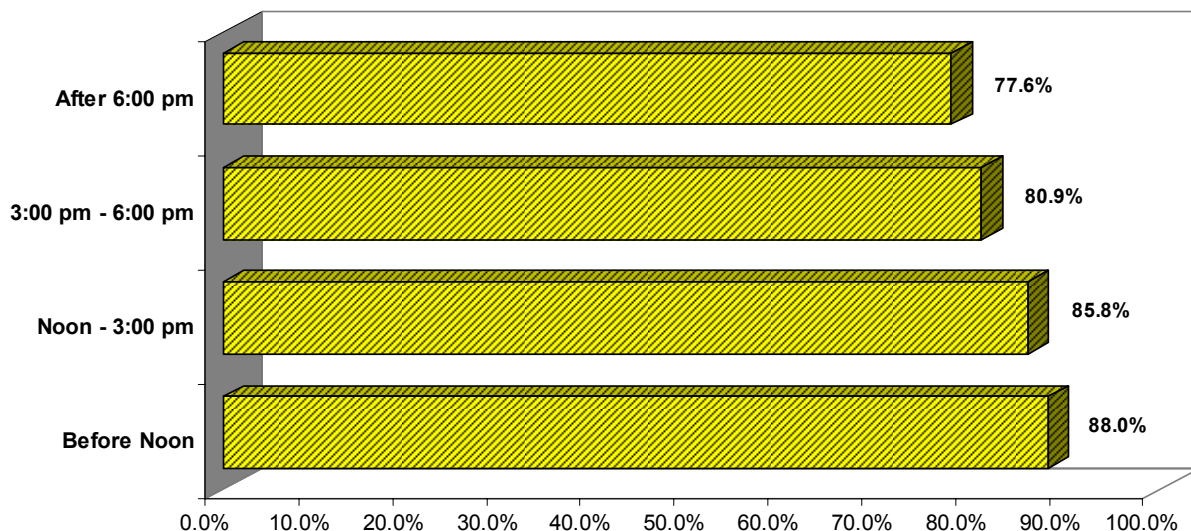
Of all outlets:

- 13.3% were visited after 6:00 pm;
- 26.3% were visited between 3:00 pm and 6:00 pm;
- 39.8% were visited between noon and 3:00 pm; and
- 20.6% were visited before noon.

Since the majority of visits (66%) were performed between noon and 6:00 pm, these results are given more weight than those outside of this time period. By time of day, the compliance level in the late afternoon falls closest in line with the national average.

Outlets visited before noon and after 6:00 pm represented only 34% of total visits and their average compliance level was 82.8%, slightly higher than the national average.

Chart 6 – Weighted – % Retailers Unwilling to Sell by Time of Visit – National – All Outlets – 2005



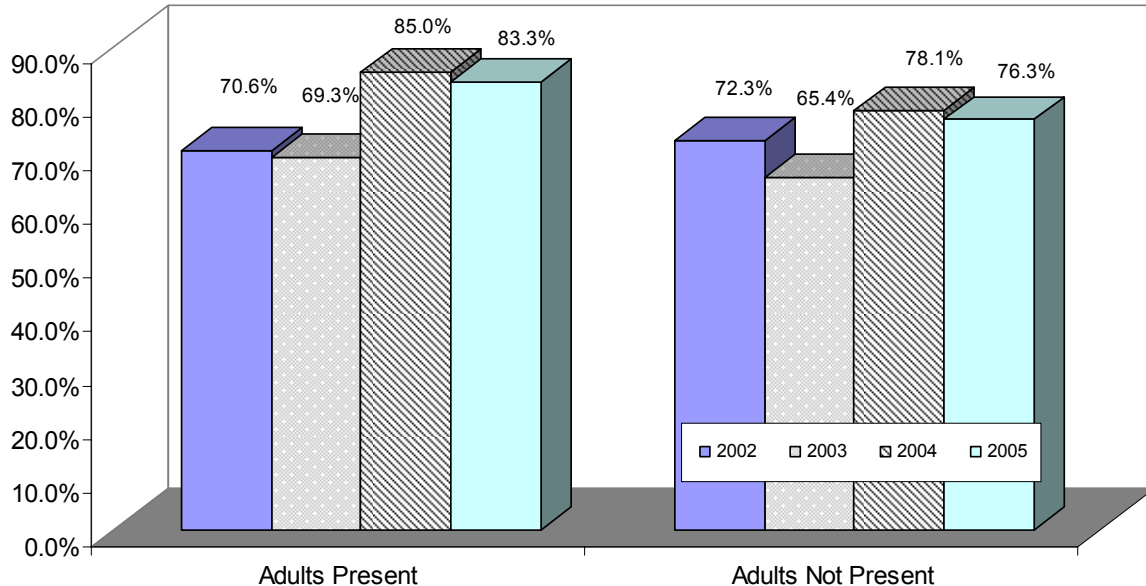
Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.1.6 National Results by Presence of Adults in Outlet

The effect of an adult customer in the outlet on compliance levels is estimated by tabulating their presence at the time of an attempt to purchase by a minor (*Chart 7*).

Adult customers were present in 62% of all outlets visited, higher than last year (60%). Compliance levels were higher when an adult was present compared to when an adult was not present in all years, except 2002. Compared to 2004, there was an insignificant drop in compliance for both groups, with a 1.7% difference when an adult was present and 1.8% when no adult was present.

Chart 7 – Weighted – National % of Retailers Refusing to Sell When Adults Were Present/Not Present



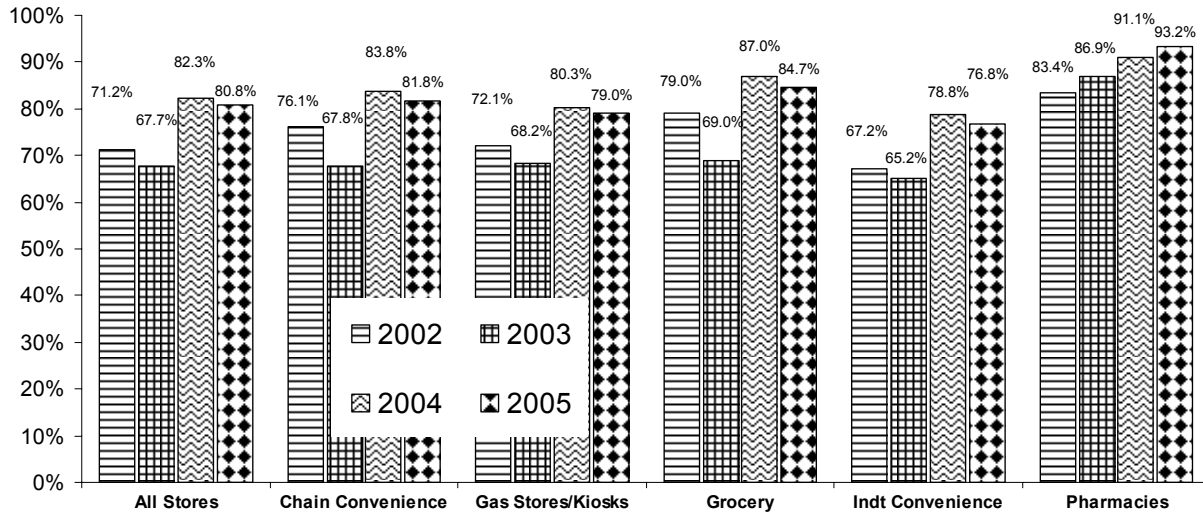
1.1.7 National Results by Class of Trade

Compliance levels for chain convenience, gas stores/kiosks and independent convenience marginally decreased (but not significantly) from last year. Grocery was the only class of trade to change significantly from last year (-2.3%) (*Chart 8*).

Pharmacies are the only class of trade showing an increase over last year, though only marginally and therefore not enough to sway the national average to also surpass last year's result. Given that pharmacies represent only a small share of the sample, it is unlikely that their compliance level results will have a profound effect on the national score.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Chart 8 – Weighted – % of Retailers Refusing to Sell to Minors by Class of Trade – National – Trended



1.2 Results by City/Province/Region

The minimum national standard governing the sale of tobacco products to young Canadians is embodied in the federal government's *Tobacco Act*. Under the Act, it is illegal for Canadian retailers to sell tobacco to minors under the age of 18. Eighteen is the minimum age of young Canadians to whom retailers can sell tobacco in Quebec, Manitoba, Saskatchewan, and Alberta. In all other provinces, the age of legality is 19.

The 2005 national compliance level (weighted average across 30 cities) is 80.8%, only marginally lower than the 2004 result of 82.3% (*Table 7*). Although the difference between this year's result and last year's is greater than the +/- 2% accuracy margin at the 95% confidence level³, it is still considered to be quite low at 1.5% and it is safe to assume that the trend for higher compliance levels is continuing from last year.

A drop in compliance levels in the two largest regions, Quebec (Δ -6.1%) and Ontario (Δ -6.8%), has contributed to this year's lower national average. In Quebec, the two cities having the trend changing effect are Quebec City (Δ -9.7%) and Sherbrooke (Δ -13.5%), while in Ontario it was Thunder Bay (Δ -17.5%) and Toronto (Δ -5.3%).

³ Based on a statistical equation designed to measure whether or not the degree of change between studies is statistically significant, at the 95% confidence level, beyond the standard error associated with the sample sizes and universe estimates in each city.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Regions with substantial increases (double digit) over last year:

- Saint John Δ 50.7%
- Saskatoon Δ 34.6%
- St. John's (NL) Δ 28.2%
- Vancouver 4 Δ 28.0%
- Fredericton Δ 18.7%
- Brandon Δ 10.5%

And regions with marginal increases (greater than 5%) over last year:

- Halifax Δ 8.8%
- Sudbury Δ 8.1%
- Winnipeg Δ 7.3%
- St. Catharines Δ 5.0%

Only 13 of the 30 regions showed an increase over last year; two of them being among the larger regions: Montreal (Δ 2.5%) and Vancouver CMA (Δ 1.0%).

Regions with substantial decreases (double digits) over last year:

- Moncton Δ -25.8%
- Red Deer Δ -21.7%
- Thunder Bay Δ -17.5%
- Sherbrooke Δ -13.5%
- Bathurst Δ -13.0%
- Edmonton Δ -11.3%

Regions with marginal decreases (greater than 5%) over last year:

- Quebec City Δ -9.7%
- Medicine Hat Δ -9.6%
- Campbell River/Courtenay: Δ -6.0%
- Toronto Δ -5.3%

Seventeen of 30 cities showed a decrease from last year, of which three are considered to be large regions: Toronto (Δ -5.3%), Ottawa (Δ -4.8%), and Quebec City (Δ -9.7%).

The region showing the highest increase (19.5% over last year) is also the region with the highest level in compliance: Saskatchewan (96.0%). Although Alberta is showing the highest decrease (Δ -7.1%), it still ranks as the third highest region, with a compliance level of 84.7%. The sharp decline this year is likely attributable to the sharp increase last year, as Alberta returns to a compliance level similar to that found in 2003. British Columbia shows the most consistency, with only a 0.3% change, as it continues to hold the number two rank for a second year in a row.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Last year's top ten cities⁴ averaged a compliance level of 95.1%, slightly lower than this year's 95.2%. Conversely, 20 out of 30 cities last year scored 80% or better, with only 19 out of 30 cities scoring 80% or better this year. This supports that the relative scoring of the individual regions has less of an effect on the national score than does the weighted effect of larger regions found in Ontario and Quebec.

The following lists the cities that scored 80% or better (greater than the national average) in 2005 and also lists their scores in 2004:

Cities	2004	2005
Saint John (NB)	48.4%	99.0%
Saskatoon	64.4%	99.0%
St. John's (NL)	70.3%	98.4%
Kingston	93.8%	94.4%
Fredericton	75.7%	94.3%
Windsor	91.8%	94.2%
Kelowna	95.7%	94.1%
Regina	93.0%	92.9%
Vancouver CMA	91.8%	92.8%
Sydney	93.8%	92.5%
Ottawa	95.8%	91.0%
Chicoutimi/Jonquiere	91.3%	90.7%
Calgary	91.7%	90.3%
Charlottetown	91.9%	90.1%
Medicine Hat	98.4%	88.8%
Sudbury	80.0%	88.1%
St. Catharines	81.5%	86.5%
Bathurst	97.2%	84.2%
Halifax	71.8%	80.5%

Five cities scored greater than 80% this year and not last year⁵. They are Saint John, Saskatoon, St. John's (NL), Fredericton, and Halifax. Fourteen cities stayed on the list, while seven fell off: Red Deer, Medicine Hat, Edmonton, Moncton, Sherbrooke, Campbell River/Courtenay, and Thunder Bay. Canada's two largest cities, Toronto and Montreal, did not make the list of top performers. Since they heavily weight the national score, their below-average score reduces the national average.

Eleven cities showed a double-digit +/- change from 2004 to 2005, representing an average of 3.6%. Thirteen cities showed a double-digit +/- change between 2003 and 2004, representing an average of 8.8%. The lower rate of change between 2004 and

⁴ Final Report of Findings 2004: The Corporate Research Group Ltd.

⁵ Final Report of Findings 2004: The Corporate Research Group Ltd.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

2005, along with the lower absolute number of cities showing considerable change, indicates a trend to consistency in compliance levels from year to year.

Finally, we found no statistically significant change (+/- 2%) in retailer compliance levels in the following eight regions:

- Vancouver CMA Δ 1.0%
- Kingston Δ 0.6%
- Regina Δ -0.1%
- Chicoutimi/Jonquiere Δ -0.6%
- Sydney Δ -1.2%
- Calgary Δ -1.4%
- Kelowna Δ -1.5%
- Charlottetown (PEI) Δ -1.7%

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 7 – Weighted – % Retailers Refusing to Sell by Region – Trended

Region	1995 Results	1996 Results	1997 Results	1998 Results	1999 Results	2000 Results	2002 Results	2003 Results	2004 Results	2005 Results
NATIONAL	47.9%	60.5%	67.3%	61.0%	69.7%	69.8%	71.2%	67.7%	82.3%	80.8%
ST. JOHN'S (NL)	33.2%	58.4%	83.4%	79.6%	52.4%	87.8%	98.2%	67.2%	70.3%	98.4%
CHARLOTTETOWN (PEI)	90.4%	34.3%	72.9%	77.9%	86.0%	86.0%	75.6%	74.8%	91.9%	90.1%
NEW BRUNSWICK	88.8%	84.8%	58.0%	40.7%	42.1%	72.7%	81.6%	78.7%	72.6%	84.1%
BATHURST	8.3%	38.7%	60.0%	22.6%	60.3%	95.4%	59.1%	78.7%	97.2%	84.2%
FREDERICTON	99.9%	89.5%	49.3%	39.8%	30.2%	79.9%	84.9%	86.3%	75.7%	94.3%
MONCTON	N/A	N/A	N/A	N/A	N/A	N/A	98.5%	82.8%	86.8%	61.1%
SAINT JOHN	94.2%	87.6%	61.5%	42.7%	45.9%	67.1%	73.1%	70.2%	48.4%	99.0%
NOVA SCOTIA	75.5%	89.8%	64.1%	69.3%	73.3%	70.9%	63.8%	89.7%	79.3%	84.5%
HALIFAX	N/A	N/A	57.4%	62.2%	84.5%	76.8%	54.1%	92.8%	71.8%	80.5%
SYDNEY	96.8%	98.1%	80.5%	86.5%	45.3%	52.2%	86.1%	82.3%	93.8%	92.5%
QUEBEC	23.9%	28.8%	45.4%	48.7%	65.2%	47.0%	57.0%	36.6%	76.5%	70.4%
CHICOUTIMI	16.0%	14.3%	49.0%	47.9%	72.2%	64.5%	80.4%	67.8%	91.3%	90.7%
JONQUIERE										
MONTREAL	27.7%	27.9%	45.4%	62.0%	69.3%	63.2%	54.2%	32.5%	67.0%	69.5%
QUEBEC CITY	9.1%	33.8%	44.8%	25.1%	57.3%	18.5%	58.4%	49.7%	78.0%	68.3%
SHERBROOKE	32.7%	45.9%	45.0%	47.5%	69.4%	41.1%	87.1%	33.8%	86.8%	73.3%
ONTARIO	62.2%	73.3%	69.4%	62.0%	79.1%	83.7%	74.8%	76.3%	83.9%	77.1%
KINGSTON	N/A	N/A	N/A	N/A	N/A	N/A	88.7%	90.1%	93.8%	94.4%
OTTAWA	40.1%	46.5%	72.1%	55.5%	84.3%	68.6%	97.6%	90.5%	95.8%	91.0%
ST. CATHARINES	N/A	N/A	N/A	N/A	N/A	N/A	77.1%	80.4%	81.5%	86.5%
SUDBURY	74.2%	61.1%	80.2%	79.7%	84.1%	59.6%	66.7%	82.4%	80.0%	88.1%
THUNDER BAY	N/A	N/A	N/A	N/A	N/A	N/A	96.2%	87.6%	84.0%	66.5%
TORONTO	68.6%	77.3%	67.9%	62.4%	78.5%	87.5%	67.8%	70.3%	75.0%	69.7%
WINDSOR	63.1%	93.2%	86.5%	63.0%	73.0%	60.0%	97.9%	100.0%	91.8%	94.2%
MANITOBA	56.5%	76.8%	72.1%	67.7%	83.7%	78.9%	65.2%	90.5%	64.5%	72.0%
BRANDON	61.0%	69.3%	47.2%	79.8%	92.6%	84.5%	84.9%	73.9%	66.7%	77.2%
WINNIPEG	56.4%	76.9%	72.3%	67.5%	83.6%	78.8%	63.6%	91.8%	64.2%	71.6%
SASKATCHEWAN	30.1%	77.8%	66.9%	73.8%	78.9%	81.4%	93.4%	81.7%	76.5%	96.0%
REGINA	N/A	N/A	58.6%	72.5%	70.7%	80.1%	95.2%	73.0%	93.0%	92.9%
SASKATOON	N/A	N/A	74.6%	75.2%	85.9%	82.6%	91.9%	89.0%	64.4%	99.0%
ALBERTA	60.1%	68.6%	80.3%	75.4%	73.6%	67.3%	87.0%	83.2%	91.8%	84.7%
CALGARY	42.1%	55.9%	82.6%	82.6%	63.2%	63.0%	95.0%	82.4%	91.7%	90.3%
EDMONTON	75.4%	78.7%	78.1%	68.2%	85.4%	71.7%	79.6%	81.0%	89.6%	78.4%
MEDICINE HAT	95.6%	93.4%	69.4%	62.5%	6.6%	95.6%	89.9%	95.4%	98.4%	88.8%
RED DEER	N/A	N/A	N/A	N/A	N/A	N/A	81.3%	100.0%	100.0%	78.3%
BRITISH COLUMBIA	69.2%	74.0%	77.7%	60.3%	59.3%	75.3%	69.3%	84.2%	91.5%	91.8%
KELOWNA	53.2%	53.6%	82.9%	87.6%	98.2%	63.8%	100.0%	93.3%	95.7%	94.1%
CAMPBELL RIVER										
COURTENAY	100.0%	100.0%	94.5%	86.8%	98.2%	85.1%	97.6%	89.8%	84.5%	78.5%
VANCOUVER CMA	69.1%	74.0%	77.5%	59.6%	58.2%	75.4%	65.5%	83.2%	91.8%	92.8%
VANCOUVER 1	N/A	N/A	N/A	N/A	N/A	N/A	62.2%	81.4%	93.3%	87.1%
VANCOUVER 2	N/A	N/A	N/A	N/A	N/A	N/A	63.8%	89.3%	93.5%	96.2%
VANCOUVER 3	N/A	N/A	N/A	N/A	N/A	N/A	71.3%	81.1%	98.6%	94.3%
VANCOUVER 4	N/A	N/A	N/A	N/A	N/A	N/A	72.3%	81.4%	70.2%	98.2%

*Note: The study years 1995-2000 were comprised of 25 core cities and 2002-2005 were comprised of 30 core cities. The cities added were Moncton, NB, Kingston, ON, St. Catharines, ON, Thunder Bay, ON, Red Deer, AB. These changes impact the results for the provinces of Alberta, Ontario and New Brunswick.

N/A = Not Applicable, i.e., region was not surveyed for tobacco sales compliance during that year

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

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Table 8 –Weighted – Sales-to-Minors Compliance Results by City/Province/Region – 2005

Region	% Unwilling to Sell (Compliant)	% Willing to Sell (Non-Compliant)	% Who Asked for ID	% Who Asked for ID but Were Unwilling to Sell	% Who Asked for ID and Were Willing to Sell	% Who Did Not Ask for ID and Were Willing to Sell
NATIONAL	80.8%	19.2%	76.4%	97.9%	2.1%	74.8%
ST. JOHN'S (NL)	98.4%	1.6%	95.4%	100.0%	0.0%	34.3%
CHARLOTTETOWN (PEI)	90.1%	9.9%	86.3%	96.5%	3.5%	50.1%
NEW BRUNSWICK	84.1%	15.9%	65.1%	97.1%	2.9%	40.3%
BATHURST	84.2%	15.8%	88.4%	95.2%	4.8%	100.0%
FREDERICTON	94.3%	5.7%	73.2%	98.5%	1.5%	17.2%
MONCTON	61.1%	38.9%	61.8%	93.9%	6.1%	92.1%
SAINT JOHN	99.0%	1.0%	55.4%	100.0%	0.0%	2.2%
NOVA SCOTIA	84.5%	15.5%	82.2%	99.1%	0.9%	83.1%
HALIFAX	80.5%	19.5%	78.3%	98.6%	1.4%	84.6%
SYDNEY	92.5%	7.5%	90.2%	100.0%	0.0%	76.6%
QUEBEC	70.4%	29.6%	59.8%	97.9%	2.1%	70.6%
CHICOUTIMI						
JONQUIERE	90.7%	9.3%	78.6%	98.9%	1.1%	39.4%
MONTREAL	69.5%	30.5%	56.7%	97.9%	2.1%	67.7%
QUEBEC CITY	68.3%	31.7%	64.7%	98.3%	1.7%	86.7%
SHERBROOKE	73.3%	26.7%	74.9%	93.9%	6.1%	88.2%
ONTARIO	77.1%	22.9%	76.7%	96.8%	3.2%	87.9%
KINGSTON	94.4%	5.6%	94.4%	100.0%	0.0%	100.0%
OTTAWA	91.0%	9.0%	90.5%	98.9%	1.1%	85.3%
ST. CATHARINES	86.5%	13.5%	80.2%	96.9%	3.1%	55.8%
SUDBURY	88.1%	11.9%	85.3%	99.0%	1.0%	75.2%
THUNDER BAY	66.5%	33.5%	61.2%	96.9%	3.1%	81.4%
TORONTO	69.7%	30.3%	71.6%	95.9%	4.1%	96.0%
WINDSOR	94.2%	5.8%	84.2%	96.3%	3.7%	17.1%
MANITOBA	72.0%	28.0%	69.8%	99.4%	0.6%	91.4%
BRANDON	77.2%	22.8%	77.2%	100.0%	0.0%	100.0%
WINNIPEG	71.6%	28.4%	69.2%	99.4%	0.6%	90.9%
SASKATCHEWAN	96.0%	4.0%	90.3%	99.0%	1.0%	32.1%
REGINA	92.9%	7.1%	91.9%	99.3%	0.7%	79.3%
SASKATOON	99.0%	1.0%	88.9%	98.8%	1.2%	0.0%
ALBERTA	84.7%	15.3%	84.4%	97.4%	2.6%	84.1%
CALGARY	90.3%	9.7%	86.7%	98.9%	1.1%	66.1%
EDMONTON	78.4%	21.6%	81.3%	95.6%	4.4%	96.3%
MEDICINE HAT	88.8%	11.2%	90.3%	98.4%	1.6%	100.0%
RED DEER	78.3%	21.7%	82.3%	95.2%	4.8%	100.0%
BRITISH COLUMBIA	91.8%	8.2%	91.5%	98.2%	1.8%	76.0%
KELOWNA	94.1%	5.9%	88.4%	100.0%	0.0%	50.8%
CAMPBELL RIVER						
COURTENAY	78.5%	21.5%	78.4%	98.3%	1.7%	93.4%
VANCOUVER CMA	92.8%	7.2%	92.9%	98.0%	2.0%	75.2%
VANCOUVER 1	87.1%	12.9%	87.2%	96.6%	3.4%	77.9%
VANCOUVER 2	96.2%	3.8%	98.0%	98.1%	1.9%	100.0%
VANCOUVER 3	94.3%	5.7%	94.6%	99.4%	0.6%	95.2%
VANCOUVER 4	98.2%	1.8%	93.6%	98.0%	2.0%	0.0%

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.2.1 Regional Results by Age of Minor

The research design called for outlet visits to be completed by teens 15, 16 and 17 years old. Nationally, approximately half of the sample was visited by 17 year olds, and the balance was visited by 15 and 16 year olds in roughly equal proportions (*Table i, Introduction*).

At the level of individual cities and regions, wherever sample sizes permitted, we targeted for outlet visits to be completed in proportions similar to the national average.

In many regions, the sample size fell below 100 outlets. Therefore, it was not practical to engage teen test shoppers of each age group. In 17 regions, Moncton, Kingston, Charlottetown (PEI), Sherbrooke, Sudbury, Sydney, Saskatoon, Windsor, St. John's (NL), Thunder Bay, Fredericton, Campbell River/Courtenay, Kelowna, Saint John, Vancouver 4, Chicoutimi/Jonquiere, and Regina, teens representative of two of the three age groups were used. In three regions, Bathurst, Red Deer and Medicine Hat, only 16 year olds were used.

Close to the national average (80.8%) were compliance levels with 16 year olds (83.8%). Fifteen year olds were higher (87.7%) than the national average and 17 year olds had a compliance level lower (74.3%) than the national average (*Table 9*). The older the teen, the more likely retailers were willing to sell. The trend is consistent with results of past surveys.

At a regional level, the poorest compliance results involving retailers visited by 17 year olds are isolated to four communities: Moncton, Montreal, Quebec City, and Winnipeg. All recorded compliance at less than 60%.

Below are regional highlights of our findings across age of teens attempting to buy tobacco products:

- 15 year olds: among 21 regions where outlets were visited by 15 year olds, only three regions scored below 80%, with the lowest being Edmonton with a compliance level of 59.7%. Four regions scored between 80% and 90% and retailers in 14 regions scored higher than 90%;
- 16 year olds: among 24 regions where outlets were visited by 16 year olds, retailers in six regions scored below 80%, retailers in five regions scored between 80% and 90%, and 13 regions scored greater than 90%. This year, none of the regions had a compliance level below 60% compared to two regions last year: Saint John (51.1%) and Winnipeg (53.2%); and
- 17 year olds: retailers in 10 regions scored below 80%. Retailers in five regions scored between 80% and 90%, and retailers in 14 regions scored higher than 90% out of a total of 29 regions in which 17 year olds attempted to buy tobacco.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

The poorest performers in this age group were Quebec City (38.2%), Montreal (44.8%) and Moncton (47.6%).

The slight decrease in performance from last year is the direct result of the lower compliance levels experienced when 17 year olds attempted to buy tobacco products. Compliance levels among 17 year olds were below the national average (80.8%) for cities in all provinces, except in Saskatchewan (96.2%), Alberta (84.0%), and British Columbia (92.3%).

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 9 – Weighted – % Retailers Unwilling to Sell by Age of Minors – Sales-to-Minors Compliance Results by City/Province/Region – 2005

Region	% Unwilling to Sell Across All Ages	% Unwilling to Sell When Teen Was 15 Years Old	% Unwilling to Sell When Teen Was 16 Years Old	% Unwilling to Sell When Teen Was 17 Years Old
NATIONAL	80.8%	87.7%	83.8%	74.3%
ST. JOHN'S (NL)	98.4%	99.3%	N/A	97.6%
CHARLOTTETOWN (PEI)	90.1%	91.4%	N/A	88.8%
NEW BRUNSWICK	84.1%	73.2%	95.3%	78.6%
BATHURST	84.2%	N/A	84.2%	N/A
FREDERICTON	94.3%	N/A	97.2%	91.6%
MONCTON	61.1%	73.2%	N/A	47.6%
SAINT JOHN	99.0%	N/A	100.0%	98.0%
NOVA SCOTIA	84.5%	91.7%	96.4%	75.6%
HALIFAX	80.5%	91.0%	96.4%	67.1%
SYDNEY	92.5%	92.4%	N/A	92.6%
QUEBEC	70.4%	87.5%	69.4%	47.2%
CHICOUTIMI				
JONQUIERE	90.7%	N/A	89.9%	91.4%
MONTREAL	69.5%	86.0%	60.1%	44.8%
QUEBEC CITY	68.3%	100.0%	96.6%	38.2%
SHERBROOKE	73.3%	87.1%	N/A	60.3%
ONTARIO	77.1%	82.7%	84.3%	72.3%
KINGSTON	94.4%	92.9%	N/A	96.1%
OTTAWA	91.0%	92.5%	94.7%	88.0%
ST. CATHARINES	86.5%	100.0%	94.9%	78.1%
SUDBURY	88.1%	100.0%	N/A	76.3%
THUNDER BAY	66.5%	N/A	73.7%	60.0%
TORONTO	69.7%	68.8%	80.6%	66.6%
WINDSOR	94.2%	98.5%	N/A	89.8%
MANITOBA	72.0%	82.3%	90.9%	54.4%
BRANDON	77.2%	N/A	77.2%	N/A
WINNIPEG	71.6%	82.3%	95.1%	54.6%
SASKATCHEWAN	96.0%	99.0%	92.9%	96.2%
REGINA	92.9%	N/A	92.9%	92.8%
SASKATOON	99.0%	99.0%	N/A	98.9%
ALBERTA	84.7%	74.6%	91.0%	84.0%
CALGARY	90.3%	80.3%	94.7%	98.8%
EDMONTON	78.4%	59.7%	86.9%	80.8%
MEDICINE HAT	88.8%	N/A	88.8%	N/A
RED DEER	78.3%	N/A	78.3%	N/A
BRITISH COLUMBIA	91.8%	96.3%	88.3%	92.3%
KELOWNA	94.1%	N/A	96.8%	91.2%
CAMPBELL RIVER				
COURTENAY	78.5%	N/A	62.5%	100.0%
VANCOUVER CMA	92.8%	96.3%	91.6%	91.9%
VANCOUVER 1	87.1%	92.3%	77.8%	89.1%
VANCOUVER 2	96.2%	98.6%	96.7%	94.7%
VANCOUVER 3	94.3%	97.9%	98.8%	90.3%
VANCOUVER 4	98.2%	N/A	98.1%	98.2%

N/A: A minor of that age was not used for observations in that region.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.2.2 Regional Results by Age of Clerk

The following are highlights for retailer compliance by region, based on the approximate age of the clerk behind the tobacco counter (*Table 10*):

- seniors had an overall national compliance of 76.8% out of the 28 regions in which clerks were seniors. Fifteen regions scored 100%, four were in the 90 percentile, one in the 80 percentile, and the remaining eight were between 50% and 79%. Seven regions scored below the national average;
- although an improvement over last year⁶, the lowest overall national compliance rate (65.6%) belonged to the age group similar to that of the minor. Eighteen regions out of 31, in which the clerks were reported to be about the same age as the minor, scored above the national average. This year's results are slightly higher than last year's result of 58.8%, but in line with the 2003 result of 64.6%;
- roughly the same as last year, clerks who are young adults (i.e., older than teens, but under 25 years of age) had an overall compliance of 80.3%;
- ranking first in compliance levels is the age group of older than 25 but not senior at 82.5%, down from last year at 86.1%. St. John's (NL), Bathurst, Saint John and Brandon each scored 100%. Only eight of 33 regions scored below the national average for this age group: Quebec City, Red Deer, Winnipeg, Montreal, Toronto, Thunder Bay, Moncton, and Sherbrooke; 17 out of 33 regions scored within the 90 percentile range and five scored within the 80 percentile range; and
- typically, the age of the clerk behind the tobacco counter made little, if any, difference in regions reporting the very highest levels of compliance.

⁶ Report Findings 2004: The Corporate Research Group Ltd.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 10 – Weighted – Sales-to-Minors Compliance Results by City/Province/Region – % Retailers Unwilling to Sell by Age of Clerk – 2005

Region	% Unwilling to Sell All Retailers	% Unwilling to Sell Age Same as Minor	% Unwilling to Sell Age Older Than Minor But < 25	% Unwilling to Sell Age Over 25 But Not a Senior Citizen	% Unwilling to Sell Senior Citizen
NATIONAL	80.8%	65.6%	80.3%	82.5%	76.8%
ST. JOHN'S (NL)	98.4%	95.9%	97.6%	100.0%	100.0%
CHARLOTTETOWN (PEI)	90.1%	74.2%	91.3%	94.9%	93.3%
NEW BRUNSWICK	84.1%	94.7%	81.1%	83.9%	100.0%
BATHURST	84.2%	100.0%	68.7%	100.0%	100.0%
FREDERICTON	94.3%	92.9%	90.3%	96.0%	100.0%
MONCTON	61.1%	N/A	58.7%	61.8%	N/A
SAINT JOHN	99.0%	100.0%	96.9%	100.0%	N/A
NOVA SCOTIA	84.5%	46.2%	84.8%	88.6%	69.1%
HALIFAX	80.5%	42.7%	80.2%	85.2%	77.9%
SYDNEY	92.5%	66.7%	95.2%	95.0%	57.0%
QUEBEC	70.4%	20.5%	69.5%	74.5%	62.2%
CHICOUTIMI					
JONQUIERE	90.7%	73.9%	88.3%	97.5%	N/A
MONTREAL	69.5%	17.7%	69.5%	73.0%	61.2%
QUEBEC CITY	68.3%	16.2%	63.2%	75.8%	71.0%
SHERBROOKE	73.3%	35.0%	67.3%	81.3%	100.0%
ONTARIO	77.1%	69.4%	75.1%	78.7%	69.4%
KINGSTON	94.4%	100.0%	100.0%	91.3%	100.0%
OTTAWA	91.0%	72.9%	92.5%	90.8%	100.0%
ST. CATHARINES	86.5%	60.9%	80.4%	91.1%	100.0%
SUDBURY	88.1%	33.6%	96.7%	90.8%	100.0%
THUNDER BAY	66.5%	58.7%	68.0%	67.8%	54.5%
TORONTO	69.7%	80.4%	65.5%	72.1%	50.1%
WINDSOR	94.2%	100.0%	90.0%	95.7%	100.0%
MANITOBA	72.0%	46.0%	69.9%	74.1%	85.4%
BRANDON	77.2%	40.9%	76.4%	100.0%	N/A
WINNIPEG	71.6%	47.2%	68.5%	73.1%	89.8%
SASKATCHEWAN	96.0%	83.5%	95.6%	97.9%	96.3%
REGINA	92.9%	80.9%	89.9%	96.3%	95.1%
SASKATOON	99.0%	88.7%	100.0%	99.3%	100.0%
ALBERTA	84.7%	55.7%	83.3%	88.4%	76.8%
CALGARY	90.3%	52.4%	92.4%	92.7%	69.4%
EDMONTON	78.4%	63.4%	73.1%	83.7%	76.1%
MEDICINE HAT	88.8%	0.0%	82.8%	97.4%	90.6%
RED DEER	78.3%	N/A	86.7%	74.8%	N/A
BRITISH COLUMBIA	91.8%	92.9%	92.0%	91.1%	98.7%
KELOWNA	94.1%	75.7%	90.6%	95.5%	100.0%
CAMPBELL RIVER					
COURTENAY	78.5%	50.0%	53.4%	86.5%	100.0%
VANCOUVER CMA	92.8%	96.4%	94.6%	91.2%	98.3%
VANCOUVER 1	87.1%	100.0%	90.9%	84.6%	100.0%
VANCOUVER 2	96.2%	100.0%	98.9%	94.4%	100.0%
VANCOUVER 3	94.3%	93.7%	93.9%	93.9%	97.6%
VANCOUVER 4	98.2%	100.0%	100.0%	97.1%	100.0%

N/A = Not Applicable

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

1.2.3 Regional Results by Class of Trade

This year's drop in compliance levels for grocery from 87.0% to 84.7% is the largest change in results in all class of trades from last year to this year. All other trades had only marginal changes (*Table 11*):

- the highest level of compliance is found within pharmacies at a rate of 93.2%. Fewer pharmacies are selling tobacco products, indicating inconclusive results in this category since it is not representative of tobacco sales-to-minors compliance levels across the country;
- the second highest compliance levels belong to grocery outlets with 84.7% with 25 out of 33 regions scoring above 80%; 13 regions scored 100%;
- the overall chain convenience outlet compliance level is 81.8%. Contributing to this success are the 23 out of 32 regions scoring above 80% (Bathurst excluded). The lowest scores belonged to Medicine Hat (60.0%) and Moncton (58.3%); and
- retailers in independent convenience outlets continue to report the lowest overall rate of compliance (76.8%) with tobacco sales-to-minors provisions, trailing closely behind gas stores/kiosks (79.0%). The regions contributing to the lower score for independent convenience outlets are Brandon and Winnipeg.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 11 – Weighted – Sales-to-Minors Compliance by City/Province/Region – % Retailers Unwilling to Sell by Class of Trade – 2005

Region	% Unwilling to Sell All Class of Trades	% Unwilling to Sell Chain Convenience	% Unwilling to Sell Gas Stores/Kiosks	% Unwilling to Sell Grocery	% Unwilling to Sell Independent Convenience	% Unwilling to Sell Pharmacies
NATIONAL	80.8%	81.8%	79.0%	84.7%	76.8%	93.2%
ST. JOHN'S (NL)	98.4%	93.8%	97.6%	95.8%	100.0%	100.0%
CHARLOTTETOWN (PEI)	90.1%	91.7%	91.2%	72.7%	93.9%	N/A
NEW BRUNSWICK	84.1%	81.3%	74.0%	92.0%	90.6%	N/A
BATHURST	84.2%	N/A	80.0%	100.0%	82.6%	N/A
FREDERICTON	94.3%	100.0%	95.7%	100.0%	91.8%	N/A
MONCTON	61.1%	58.3%	47.6%	77.8%	77.8%	N/A
SAINT JOHN	99.0%	100.0%	100.0%	100.0%	98.1%	N/A
NOVA SCOTIA	84.5%	80.7%	87.1%	79.4%	84.8%	N/A
HALIFAX	80.5%	73.9%	82.8%	66.7%	83.2%	N/A
SYDNEY	92.5%	100.0%	94.4%	100.0%	88.4%	N/A
QUEBEC	70.4%	68.9%	71.7%	76.7%	68.7%	N/A
CHICOUTIMI						
JONQUIERE	90.7%	100.0%	90.6%	94.4%	85.9%	N/A
MONTREAL	69.5%	68.8%	71.0%	76.7%	67.9%	N/A
QUEBEC CITY	68.3%	63.8%	71.3%	73.5%	65.4%	N/A
SHERBROOKE	73.3%	64.7%	65.5%	71.4%	80.9%	N/A
ONTARIO	77.1%	84.2%	77.2%	82.7%	71.1%	N/A
KINGSTON	94.4%	100.0%	95.2%	100.0%	89.2%	N/A
OTTAWA	91.0%	94.5%	88.4%	88.9%	93.6%	N/A
ST. CATHARINES	86.5%	88.2%	82.1%	100.0%	85.6%	N/A
SUDBURY	88.1%	94.1%	82.9%	88.2%	90.0%	N/A
THUNDER BAY	66.5%	77.8%	46.2%	100.0%	88.5%	N/A
TORONTO	69.7%	77.5%	73.5%	76.0%	60.6%	N/A
WINDSOR	94.2%	94.4%	90.5%	100.0%	95.7%	N/A
MANITOBA	72.0%	75.5%	64.2%	83.2%	57.3%	82.2%
BRANDON	77.2%	100.0%	78.9%	66.7%	37.5%	100.0%
WINNIPEG	71.6%	74.1%	62.5%	84.6%	59.5%	81.0%
SASKATCHEWAN	96.0%	100.0%	95.0%	92.3%	94.0%	98.2%
REGINA	92.9%	100.0%	91.9%	90.0%	86.2%	96.0%
SASKATOON	99.0%	100.0%	98.3%	94.4%	100.0%	100.0%
ALBERTA	84.7%	92.3%	72.8%	87.1%	83.3%	94.8%
CALGARY	90.3%	94.4%	82.7%	88.9%	91.6%	98.0%
EDMONTON	78.4%	90.8%	59.0%	83.8%	68.5%	93.7%
MEDICINE HAT	88.8%	60.0%	87.5%	88.9%	84.6%	100.0%
RED DEER	78.3%	100.0%	72.7%	100.0%	84.6%	71.4%
BRITISH COLUMBIA	91.8%	94.0%	90.3%	96.1%	90.7%	92.1%
KELOWNA	94.1%	88.9%	86.4%	100.0%	100.0%	100.0%
CAMPBELL RIVER						
COURTENAY	78.5%	100.0%	72.7%	100.0%	73.9%	71.4%
VANCOUVER CMA	92.8%	93.9%	92.3%	95.3%	91.9%	92.7%
VANCOUVER 1	87.1%	93.2%	82.7%	94.6%	84.9%	87.9%
VANCOUVER 2	96.2%	96.4%	96.6%	100.0%	94.3%	95.8%
VANCOUVER 3	94.3%	95.8%	95.3%	90.2%	92.1%	95.8%
VANCOUVER 4	98.2%	80.0%	96.7%	100.0%	100.0%	100.0%

N/A indicates that the class of trade is not represented in the respective region since it does not sell tobacco.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.2.4 Regional Results by Gender of Minor

Equivalent to last year, males went into 29 of the 30 cities and females went into 27 of the 30 cities; however, the results differ from last year. The gap between male compliance and female compliance has increased from 1.9% last year to 9.0% this year. On a more surprising level is the reversal of the trend; male compliance levels have surpassed female compliance levels (*Table 12*). Male compliance has made a noticeable gain over last year's 81.3% to this year's 85.3%, and female compliance levels dropped from last year's 83.2% to this year's 76.3%, a 6.9% change.

The drop in female compliance is due to the low compliance levels of female minors among the regions in the province of Quebec (55.8%) compared to last year's 80.5%. Although the female compliance levels dropped, the male compliance levels increased dramatically among the regions in this province, changing Quebec from 72.3% last year to 85.3% this year. The following illustrates Quebec's compliance levels:

	All Teens	Male	Female
Quebec	70.4%	85.3%	55.8%
Chicoutimi/Jonquiere	90.7%	91.1%	90.3%
Montreal	69.5%	90.5%	49.1%
Quebec City	68.3%	68.0%	68.5%
Sherbrooke	73.3%	60.7%	85.6%

Of the 26 cities where both male and female minors attempted to buy tobacco products, the results were split equally, where 50% (13) of the cities visited, females were more likely than males to be refused the sale of tobacco, and where 50% (13) of the cities visited, males were more likely than females to be refused the sale of tobacco.

Notable changes in female compliance levels (double digits) from last year are:

- Saint John (NB) Δ 47.9%
- Fredericton Δ 29.6%
- St. John's Δ 26.8%
- Campbell River/Courtenay Δ 19.0%
- St. Catharines Δ 12.5%
- Brandon Δ 10.5%
- Edmonton Δ -10.3%
- Sherbrooke Δ -12.4%
- Winnipeg Δ -14.6%
- Toronto Δ -15.1%
- Montreal Δ -25.8%

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Special attention is given to the two largest cities, Toronto and Montreal, showing double-digit declines.

Table 12 – Weighted – Sales-to-Minors Compliance Results by City/Province/Region – % Retailers Unwilling to Sell by Gender of Minor – 2005

Region	% Unwilling to Sell All Teens	% Unwilling to Sell When Teen Was Male	% Unwilling to Sell When Teen Was Female
NATIONAL	80.8%	85.3%	76.3%
ST. JOHN'S (NL)	98.4%	97.5%	99.3%
CHARLOTTETOWN (PEI)	90.1%	91.5%	88.5%
NEW BRUNSWICK	84.1%	80.5%	88.0%
BATHURST	84.2%	84.2%	N/A
FREDERICTON	94.3%	91.6%	97.2%
MONCTON	61.1%	49.0%	70.7%
SAINT JOHN	99.0%	98.0%	100.0%
NOVA SCOTIA	84.5%	88.4%	80.5%
HALIFAX	80.5%	86.3%	74.8%
SYDNEY	92.5%	92.6%	92.4%
QUEBEC	70.4%	85.3%	55.8%
CHICOUTIMI			
JONQUIERE	90.7%	91.1%	90.3%
MONTREAL	69.5%	90.5%	49.1%
QUEBEC CITY	68.3%	68.0%	68.5%
SHERBROOKE	73.3%	60.7%	85.6%
ONTARIO	77.1%	80.6%	73.5%
KINGSTON	94.4%	96.0%	93.0%
OTTAWA	91.0%	93.6%	88.0%
ST. CATHARINES	86.5%	81.4%	91.5%
SUDBURY	88.1%	100.0%	76.7%
THUNDER BAY	66.5%	58.6%	74.7%
TORONTO	69.7%	74.9%	64.6%
WINDSOR	94.2%	98.5%	89.8%
MANITOBA	72.0%	73.0%	71.2%
BRANDON	77.2%	N/A	77.2%
WINNIPEG	71.6%	73.0%	70.1%
SASKATCHEWAN	96.0%	96.1%	95.9%
REGINA	92.9%	92.9%	92.9%
SASKATOON	99.0%	98.9%	99.0%
ALBERTA	84.7%	85.3%	84.1%
CALGARY	90.3%	85.6%	96.5%
EDMONTON	78.4%	85.9%	75.9%
MEDICINE HAT	88.8%	88.8%	N/A
RED DEER	78.3%	78.3%	N/A
BRITISH COLUMBIA	91.8%	88.4%	95.2%
KELOWNA	94.1%	96.8%	91.2%
CAMPBELL RIVER			
COURTENAY	78.5%	62.5%	100.0%
VANCOUVER CMA	92.8%	90.2%	95.2%
VANCOUVER 1	87.1%	83.8%	90.0%
VANCOUVER 2	96.2%	92.8%	99.3%
VANCOUVER 3	94.3%	92.0%	96.6%
VANCOUVER 4	98.2%	98.1%	98.2%

N/A = A minor of that gender was not used for observations in that region.

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.2.5 Regional Results by Gender of Clerk

While national compliance levels among female clerks remains unchanged from last year, at 83.8%, compliance levels among male clerks dropped from 80.5% to 77.5% this year (*Table 13*).

Six of the 30 cities had compliance differences between male clerks and female clerks that were statistically insignificant.

Of the 24 cities where the difference in compliance between male and female clerks was significant, only in four cities were male clerks more likely to refuse a sale of tobacco products to minors, with female clerks taking the lead in 20 cities.

The top nine cities where the difference in the rate of compliance measured between male and female clerks is significant are:

Region	Difference Between Male and Female Clerks
Kelowna	10.2%
Winnipeg	11.0%
St. Catharines	12.5%
Red Deer	15.4%
Bathurst	17.6%
Moncton	18.0%
Edmonton	19.3%
Brandon	24.4%
Campbell River/Courtenay	30.4%

We acknowledge the possibility in all cases that factors other than the gender of clerks (e.g., the age and/or gender of teens) may have some bearing on the findings along this dimension.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 13 – Weighted – Sales-to-Minors Compliance Results by City/Province/Region – % Retailers Unwilling to Sell by Gender of Clerk – 2005

Region	% Unwilling to Sell All Stores	% Unwilling to Sell When Clerk is Male	% Unwilling to Sell When Clerk is Female
NATIONAL	80.8%	77.5%	83.8%
ST. JOHN'S (NL)	98.4%	97.9%	98.8%
CHARLOTTETOWN (PEI)	90.1%	86.0%	92.9%
NEW BRUNSWICK	84.1%	76.5%	89.4%
BATHURST	84.2%	75.2%	92.8%
FREDERICTON	94.3%	90.8%	97.9%
MONCTON	61.1%	51.5%	69.5%
SAINT JOHN	99.0%	100.0%	98.6%
NOVA SCOTIA	84.5%	84.6%	84.4%
HALIFAX	80.5%	81.9%	79.2%
SYDNEY	92.5%	92.0%	92.8%
QUEBEC	70.4%	66.7%	74.3%
CHICOUTIMI			
JONQUIERE	90.7%	87.3%	93.3%
MONTREAL	69.5%	66.2%	74.1%
QUEBEC CITY	68.3%	63.5%	70.8%
SHERBROOKE	73.3%	67.5%	75.5%
ONTARIO	77.1%	77.6%	76.3%
KINGSTON	94.4%	90.2%	97.0%
OTTAWA	91.0%	92.0%	87.9%
ST. CATHARINES	86.5%	79.7%	92.2%
SUDBURY	88.1%	84.2%	89.7%
THUNDER BAY	66.5%	63.9%	68.4%
TORONTO	69.7%	71.8%	66.6%
WINDSOR	94.2%	91.2%	97.5%
MANITOBA	72.0%	64.9%	76.9%
BRANDON	77.2%	64.3%	88.7%
WINNIPEG	71.6%	64.9%	75.9%
SASKATCHEWAN	96.0%	93.0%	98.0%
REGINA	92.9%	89.2%	96.2%
SASKATOON	99.0%	98.2%	99.3%
ALBERTA	84.7%	79.9%	88.1%
CALGARY	90.3%	89.5%	90.9%
EDMONTON	78.4%	66.8%	86.1%
MEDICINE HAT	88.8%	93.8%	86.0%
RED DEER	78.3%	67.1%	82.4%
BRITISH COLUMBIA	91.8%	90.9%	92.5%
KELOWNA	94.1%	87.3%	97.5%
CAMPBELL RIVER			
COURTENAY	78.5%	55.3%	85.7%
VANCOUVER CMA	92.8%	92.8%	92.7%
VANCOUVER 1	87.1%	85.8%	88.2%
VANCOUVER 2	96.2%	97.7%	95.1%
VANCOUVER 3	94.3%	96.3%	93.2%
VANCOUVER 4	98.2%	97.9%	98.3%

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.2.6 Regional Results by Proximity to Schools and/or Malls

The compliance level gap between outlets near schools and/or malls and elsewhere has widened this year over last year, with the national average being very close to the compliance level of outlets elsewhere (*Table 14*). To describe the relevance of the gap, it should be noted that only 38.8% of the total retailers surveyed this year were near a school or mall, compared to last year where 48.0% of all outlets were near a school or mall. The higher number of outlets being shopped elsewhere within the sample provides a greater weight to the national average, explaining the similarity of the results between the national average and the compliance levels of outlets not near a school and/or mall.

In the 30 cities, eight had compliance differences (based on proximity to schools/malls and elsewhere) that were not significant. Of the remaining 22 cities, 15 had compliance differences that were within +/- 10%, six were between +/- 10% and +/- 15%, and only one was greater than +/- 15%, indicating a difference in compliance levels of retailers near schools and/or malls versus elsewhere.

Regions with outlets in proximity to schools and or malls where compliance levels dropped by more than five percent from last year's levels are:

- Bathurst
- Medicine Hat
- Moncton
- Montreal
- Ottawa
- Quebec City
- Red Deer
- Sherbrooke
- Sudbury
- Thunder Bay
- Toronto

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 14 – Weighted – Sales-to-Minors Compliance Results by City/Province/Region – % Retailers Unwilling to Sell by Proximity to Schools and/or Malls – 2005

Region	% Unwilling to Sell All Stores	% Unwilling to Sell Near a School/Mall	% Unwilling to Sell Elsewhere
NATIONAL	80.8%	82.7%	79.7%
ST. JOHN'S (NL)	98.4%	96.6%	99.4%
CHARLOTTETOWN (PEI)	90.1%	91.7%	88.5%
NEW BRUNSWICK	84.1%	76.7%	91.0%
BATHURST	84.2%	84.1%	84.3%
FREDERICTON	94.3%	88.3%	97.8%
MONCTON	61.1%	58.0%	68.1%
SAINT JOHN	99.0%	100.0%	98.4%
NOVA SCOTIA	84.5%	85.3%	84.1%
HALIFAX	80.5%	81.4%	80.1%
SYDNEY	92.5%	92.7%	92.4%
QUEBEC	70.4%	67.6%	71.4%
CHICOUTIMI			
JONQUIERE	90.7%	100.0%	88.0%
MONTREAL	69.5%	66.3%	70.8%
QUEBEC CITY	68.3%	64.0%	69.7%
SHERBROOKE	73.3%	74.8%	72.2%
ONTARIO	77.1%	75.2%	77.8%
KINGSTON	94.4%	89.1%	98.3%
OTTAWA	91.0%	85.4%	93.5%
ST. CATHARINES	86.5%	94.0%	81.1%
SUDBURY	88.1%	82.2%	95.7%
THUNDER BAY	66.5%	67.3%	66.2%
TORONTO	69.7%	59.6%	72.3%
WINDSOR	94.2%	96.9%	92.6%
MANITOBA	72.0%	77.2%	68.6%
BRANDON	77.2%	77.3%	77.0%
WINNIPEG	71.6%	77.2%	68.2%
SASKATCHEWAN	96.0%	98.1%	94.4%
REGINA	92.9%	96.7%	90.8%
SASKATOON	99.0%	98.9%	99.0%
ALBERTA	84.7%	89.2%	78.0%
CALGARY	90.3%	92.8%	84.8%
EDMONTON	78.4%	84.4%	72.4%
MEDICINE HAT	88.8%	88.5%	89.6%
RED DEER	78.3%	82.5%	74.0%
BRITISH COLUMBIA	91.8%	95.6%	89.4%
KELOWNA	94.1%	95.3%	92.7%
CAMPBELL RIVER			
COURTENAY	78.5%	92.2%	71.7%
VANCOUVER CMA	92.8%	95.8%	90.8%
VANCOUVER 1	87.1%	95.5%	83.6%
VANCOUVER 2	96.2%	93.3%	97.8%
VANCOUVER 3	94.3%	96.0%	92.6%
VANCOUVER 4	98.2%	100.0%	96.2%

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.2.7 Regional Results by Presence or Not of Adults in Outlet

The margin of compliance levels between adults present and not present remains the same as last year with under-aged teens being refused the sale of tobacco based on the presence of adults (*Table 15*).

Regionally, the presence of adults in retail outlets correlated with higher rates of retailer compliance in 23 of the 30 cities visited. In seven cities differences with and without adults were statistically insignificant and the remainder showed a lower compliance level when adults were present.

The cities reporting the largest gap (more retailers were willing to sell to minors when adults were not present) in compliance rates (double digits) are:

- Thunder Bay Δ 27.2%
- Red Deer Δ 24.2%
- Edmonton Δ 20.2%
- Quebec City Δ 17.7%
- St. Catharines Δ 16.8%
- Toronto Δ 12.6%
- Sherbrooke Δ 12.2%
- Winnipeg Δ 10.1%

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 15 – Weighted – Sales-to-Minors Compliance by City/Province/Region – % Retailers Unwilling to Sell Based on Presence of Adult Customers in Outlet – 2005

Region	% Unwilling to Sell All Stores	% Unwilling to Sell Stores With Adult Customers	% Unwilling to Sell Stores Without Adult Customers
NATIONAL	80.8%	83.3%	76.3%
ST. JOHN'S (NL)	98.4%	98.9%	97.4%
CHARLOTTETOWN (PEI)	90.1%	89.0%	92.9%
NEW BRUNSWICK	84.1%	82.0%	89.3%
BATHURST	84.2%	86.2%	81.6%
FREDERICTON	94.3%	96.0%	92.4%
MONCTON	61.1%	60.9%	62.3%
SAINT JOHN	99.0%	100.0%	96.5%
NOVA SCOTIA	84.5%	85.3%	83.8%
HALIFAX	80.5%	80.4%	80.6%
SYDNEY	92.5%	96.4%	89.5%
QUEBEC	70.4%	72.7%	65.2%
CHICOUTIMI			
JONQUIERE	90.7%	93.3%	85.9%
MONTREAL	69.5%	71.0%	65.9%
QUEBEC CITY	68.3%	74.3%	56.6%
SHERBROOKE	73.3%	79.2%	67.0%
ONTARIO	77.1%	82.0%	71.1%
KINGSTON	94.4%	94.4%	94.5%
OTTAWA	91.0%	94.7%	86.9%
ST. CATHARINES	86.5%	95.0%	78.2%
SUDBURY	88.1%	89.0%	86.3%
THUNDER BAY	66.5%	79.6%	52.4%
TORONTO	69.7%	75.4%	62.7%
WINDSOR	94.2%	94.3%	94.0%
MANITOBA	72.0%	74.7%	66.1%
BRANDON	77.2%	75.2%	80.7%
WINNIPEG	71.6%	74.7%	64.6%
SASKATCHEWAN	96.0%	95.8%	96.4%
REGINA	92.9%	93.3%	92.2%
SASKATOON	99.0%	98.2%	100.0%
ALBERTA	84.7%	89.2%	76.2%
CALGARY	90.3%	92.4%	85.7%
EDMONTON	78.4%	85.6%	65.5%
MEDICINE HAT	88.8%	90.2%	87.7%
RED DEER	78.3%	86.2%	62.0%
BRITISH COLUMBIA	91.8%	92.9%	89.6%
KELOWNA	94.1%	94.6%	92.4%
CAMPBELL RIVER			
COURTENAY	78.5%	76.6%	81.0%
VANCOUVER CMA	92.8%	93.9%	90.4%
VANCOUVER 1	87.1%	89.9%	78.7%
VANCOUVER 2	96.2%	98.8%	92.3%
VANCOUVER 3	94.3%	94.5%	93.9%
VANCOUVER 4	98.2%	96.7%	100.0%

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

1.3 Results by Presence of "Operation ID" Signs

Compliance levels are measured as they relate to those retailers who participate and do not participate in the "Operation ID" program. Results by city and class of trade are extrapolated using a weighted average approach to estimate the provincial and national averages.

"Operation ID" is an initiative of the Canadian Coalition for Responsible Tobacco Retailing designed to encourage retailers to proactively adhere to the sales-to-minors provisions of Canada's various tobacco laws. The program is promoted openly as an effort to pre-empt further legislative encroachment on the right of private retailers to sell tobacco. Concerned about possibly tighter government restrictions on tobacco retail sales, the program seeks to help retailers deal with minors who want to buy tobacco⁷.

The program reminds retailers of the legal penalties for selling tobacco to minors and provides training to participating retailers on dealing with various situations when minors ask to purchase tobacco. The "Operation ID" kit includes a training guide for adults and for young employees, along with various forms of point-of-sale materials (posters, danglers, window stickers and counter cards) stressing the need of minors wanting to buy tobacco to show ID.

Participating Retailers

Of the 5,561 retailers visited, only 44.7% participated in the "Operation ID", up slightly from last year (43.7%) and still slightly lower than 2003 (45.2%) (*Table 16*). Half of the cities visited (15) showed reduced participation levels over last year, with an average drop of 20.6%. The two largest cities in Canada, Montreal and Toronto, were both on the declining participation side of the scale. The remaining half increased in participation levels with an average of 21.8%.

⁷ The mission statement of the Coalition can be found at the *Operation ID* website: <http://operationid.com/kit-howtoletter.html>

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The cities with the highest increase in participation are:

Region	Increase From Last Year
Sudbury	69.0%
Brandon	61.5%
Kelowna	30.5%
Calgary	26.2%
Ottawa	25.1%
Red Deer	20.5%
Moncton	19.2%
St. Catharines	17.2%
Chicoutimi/Jonquiere	16.7%
Fredericton	10.3%

The cities with the highest decrease in participation levels are:

Region	Decrease From Last Year
Sydney	-76.4%
Saint John (NB)	-58.8%
Thunder Bay	-34.0%
Saskatoon	-21.9%
Medicine Hat	-21.9%
Toronto	-15.3%
Charlottetown	-14.7%
Sherbrooke	-14.3%
St. John's (NL)	-11.5%

In Saskatchewan, where the provincial legislation prohibits the posting of tobacco-related signs other than those specifically mandated by tobacco laws as of 2003, only 8% of retailers participated in the "Operation ID" program, down from a promising participation rate of 25% last year. This indicates a return to levels of participation experienced in previous years⁸.

Overall Sales-to-Minors Compliance Rates

Of concern herein is the level of retailer compliance in relation to the retailers' participation in the "Operation ID" program. The even distribution throughout the sample of retailers participating in "Operation ID" and those not participating allows for a reliable

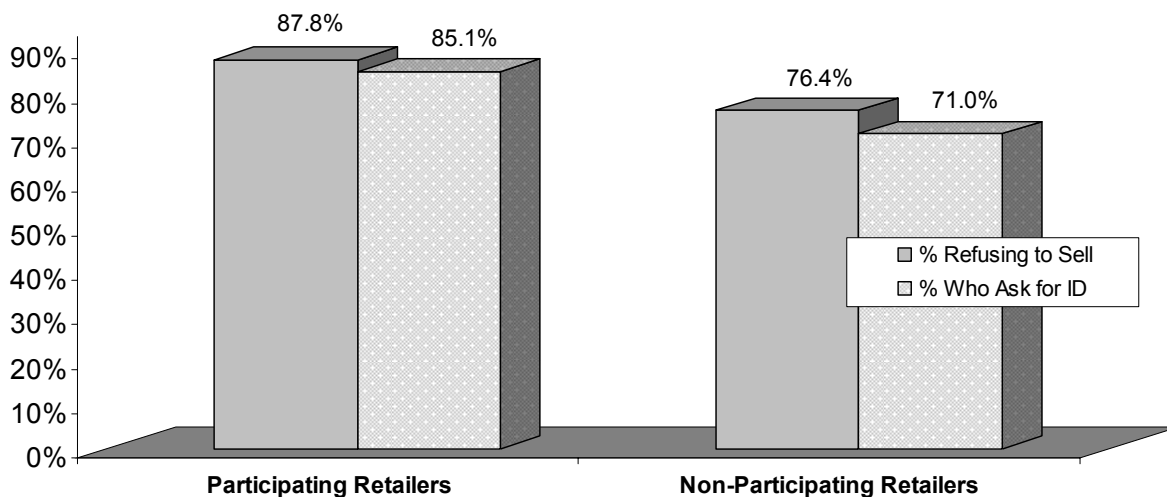
⁸ Final Report of Findings: AC Nielsen 2003

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comparison of retailers' compliance with the sales-to-minors provisions of the tobacco laws. At the provincial level, comparisons should be viewed more cautiously, depending on the sample sizes between groups in each city.

Nationally (*Table 17*), 87.8% of retailers participating in "Operation ID" refused to sell tobacco products to minors, whereas 76.4% of retailers not participating refused to sell to minors. Similar trend to last year⁹, however, with a wider gap¹⁰. In 2005, compliance levels are higher within those retailer groups who participate than those who do not. The respective levels of compliance in each group correlate directly with the percentage of retailers asking for ID (*Chart 9*).

Chart 9 – Weighted – National Sales-to-Minors Compliance Based on Retailer Participation in "Operation ID" – 2005



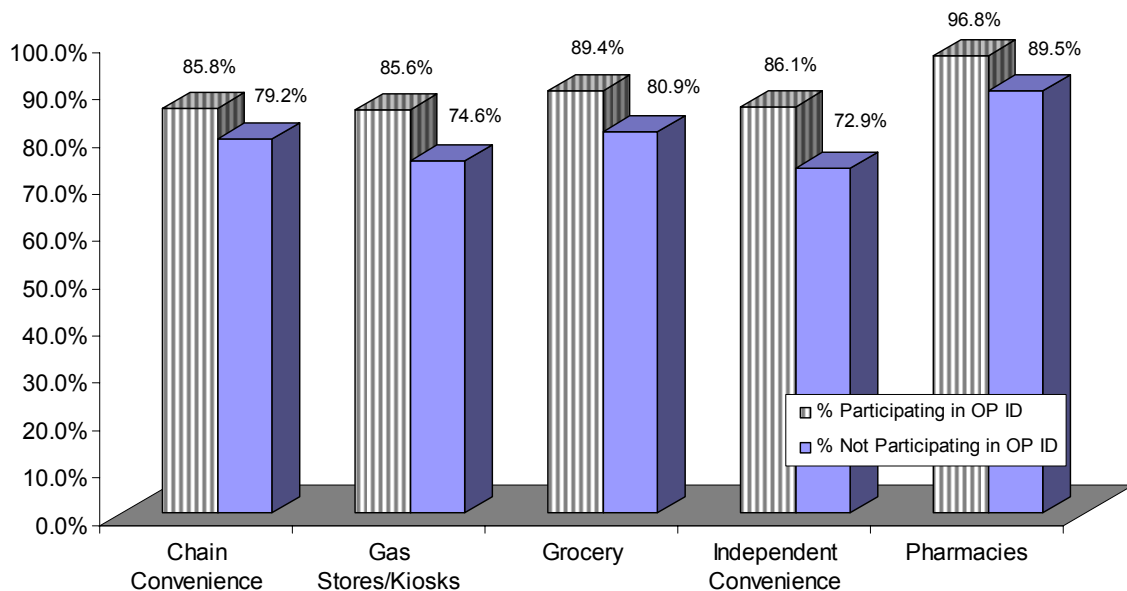
Statistically significant differences in the rate of retailer compliance based on "Operation ID" participation were found in all trade channels. Pharmacies reported a higher level of compliance when not participating in "Operation ID" than when participating in "Operation ID" (Chart 10). For all other classes of trade, teens were more likely to be refused a sale if the establishment participated in "Operation ID" than if it didn't. Similar to last year, the refusal rate among pharmacies was high, regardless of participation (or not) in "Operation ID".

⁹ Last year's results were 84.1% compliance in participating retailers and 80.8% in non-participating retailers. Final Report of Findings: The Corporate Research Group Ltd. 2004

¹⁰ Statistically, given the sample sizes involved and the compliance rate, any difference nationally of 5 percentage points in either direction (up or down) suggests there is a high probability that the difference in compliance between participating and non-participating retailers is meaningful.

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Chart 10 – Weighted – National Sales-to-Minors Compliance Based on Retailer Participation in “Operation ID” by Class of Trade – 2005



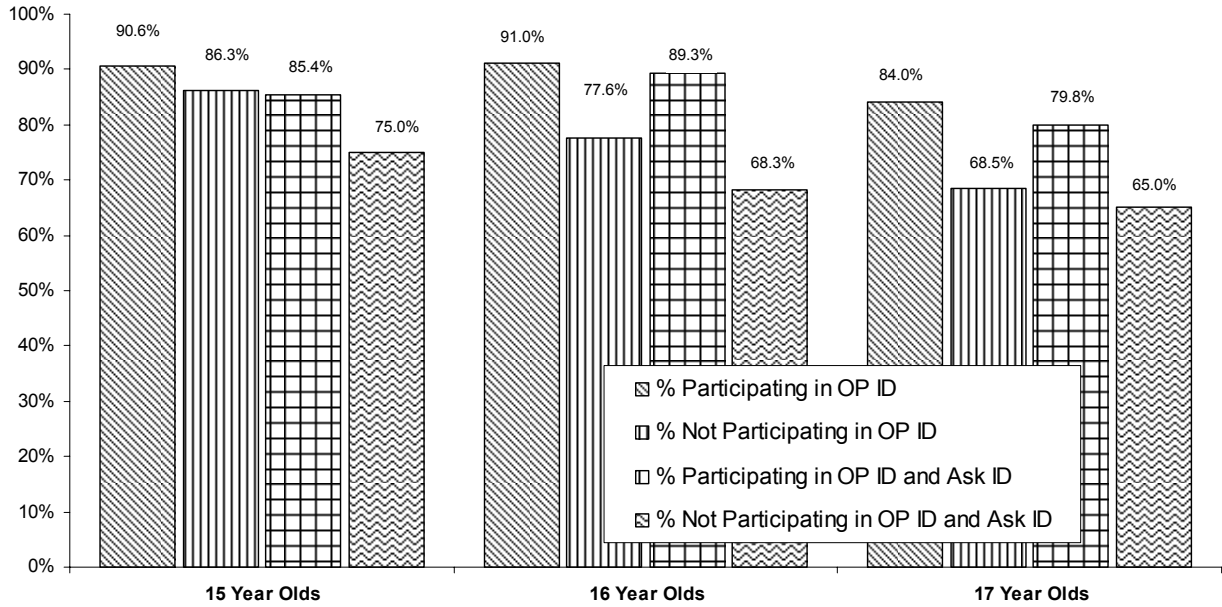
Of the 30 cities we visited, we were able to draw comparisons between outlets participating and those not participating in "Operation ID" in 29 of them (*Table 16*). (In Brandon, every outlet we visited carried an "Operation ID" sign, so no comparison is possible.) Of the 29 cities, the difference in compliance recorded between participating and non-participating retailers was deemed large enough to be significant¹¹ in 18 cities (*Table 17*). Of the 18 cities reporting a significant difference in compliance levels between outlets that participate and those that do not, 12 report a higher compliance level in outlets that participate and six show a higher level of compliance in those outlets that do not participate. Therefore, similar to last year, a significant positive difference in compliance levels related to participation in "Operation ID" exists in 12 of the 29 cities visited.

Higher sales-to-minors compliance involving minors of all ages coincides directly with retailer willingness to ask for proper ID. Retailers participating in the "Operation ID" program were more likely than non-participating retailers to ask for proof of age. However, participation in the program did not result in uniform demand for age identification across age groups, or in more uniform rates of compliance between groups. Whether or not retailers endorsed "Operation ID", older teens had an easier time attempting to buy tobacco products than younger ones did (*Chart 11*). This finding is consistent with results in 2004.

¹¹ Given the sample sizes involved and the compliance rate, any difference nationally of 5 percentage points in either direction (up or down) suggests there is a high probability that the difference in compliance between participating and non-participating retailers is meaningful. Not to be confused with statistically significant tolerance levels of +/- 2%.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Chart 11 – Weighted – National – Sales-to-Minors Compliance by Age of Teen Based on Retailer Participation in “Operation ID” – 2005



Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 16 – Raw – “Operation ID” Retailer Participation Rate by City/Province/Region 2005 vs. 2004 Comparison

Region	Participated in "Operation ID" in 2004			Participated in "Operation ID" in 2005			Participation Rate Difference 2005 vs 2004
	# Sample Stores Participating in "Operation ID" (Raw)	Total # Stores In Sample (Raw)	Participation % of Sample	# Sample Stores Participating in "Operation ID" (Raw)	Total # Stores In Sample (Raw)	Participation % of Sample	
NATIONAL	2409	5516	43.7%	2,483	5,561	44.7%	1.0%
ST. JOHN'S (NL)	136	195	69.7%	113	194	58.2%	-11.5%
CHARLOTTETOWN (PEI)	70	86	81.4%	60	90	66.7%	-14.7%
NEW BRUNSWICK	190	277	68.6%	167	294	56.8%	-11.8%
BATHURST	13	36	36.1%	11	36	30.6%	-5.6%
FREDERICTON	51	74	68.9%	65	82	79.3%	10.3%
MONCTON	40	76	52.6%	56	78	71.8%	19.2%
SAINT JOHN	86	91	94.5%	35	98	35.7%	-58.8%
NOVA SCOTIA	212	376	56.4%	120	375	32.0%	-24.4%
HALIFAX	84	248	33.9%	90	248	36.3%	2.4%
SYDNEY	128	128	100.0%	30	127	23.6%	-76.4%
QUEBEC	350	923	37.9%	356	933	38.2%	0.2%
CHICOUTIMI JONQUIERE	104	126	82.5%	125	126	99.2%	16.7%
MONTREAL	79	364	21.7%	46	367	12.5%	-9.2%
QUEBEC CITY	135	327	41.3%	168	333	50.5%	9.2%
SHERBROOKE	32	106	30.2%	17	107	15.9%	-14.3%
ONTARIO	512	1273	40.2%	586	1,279	45.8%	5.6%
KINGSTON	40	81	49.4%	46	82	56.1%	6.7%
OTTAWA	86	214	40.2%	141	216	65.3%	25.1%
ST. CATHARINES	63	227	27.8%	106	236	44.9%	17.2%
SUDBURY	22	105	21.0%	98	109	89.9%	69.0%
THUNDER BAY	62	75	82.7%	36	74	48.6%	-34.0%
TORONTO	151	412	36.7%	88	412	21.4%	-15.3%
WINDSOR	88	159	55.3%	71	150	47.3%	-8.0%
MANITOBA	134	338	39.6%	133	332	40.1%	0.4%
BRANDON	15	39	38.5%	38	38	100.0%	61.5%
WINNIPEG	119	299	39.8%	95	294	32.3%	-7.5%
SASKATCHEWAN	76	302	25.2%	25	314	8.0%	-17.2%
REGINA	15	128	11.7%	4	154	2.6%	-9.1%
SASKATOON	61	174	35.1%	21	160	13.1%	-21.9%
ALBERTA	351	793	44.3%	434	790	54.9%	10.7%
CALGARY	137	348	39.4%	225	343	65.6%	26.2%
EDMONTON	132	337	39.2%	132	339	38.9%	-0.2%
MEDICINE HAT	62	64	96.9%	48	64	75.0%	-21.9%
RED DEER	20	44	45.5%	29	44	65.9%	20.5%
BRITISH COLUMBIA	378	953	39.7%	489	960	50.9%	11.3%
KELOWNA	55	92	59.8%	84	93	90.3%	30.5%
CAMPBELL RIVER COURTENAY	31	84	36.9%	29	72	40.3%	3.4%
VANCOUVER CMA	292	777	37.6%	376	795	47.3%	9.7%
VANCOUVER 1	73	240	30.4%	102	239	42.7%	12.3%
VANCOUVER 2	63	215	29.3%	112	215	52.1%	22.8%
VANCOUVER 3	107	218	49.1%	115	229	50.2%	1.1%
VANCOUVER 4	49	104	47.1%	47	112	42.0%	-5.2%

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

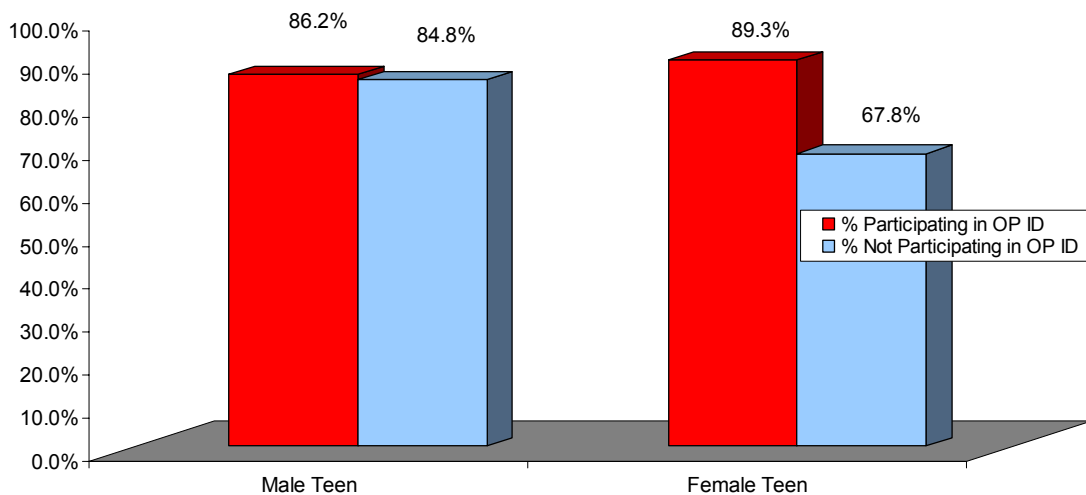
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

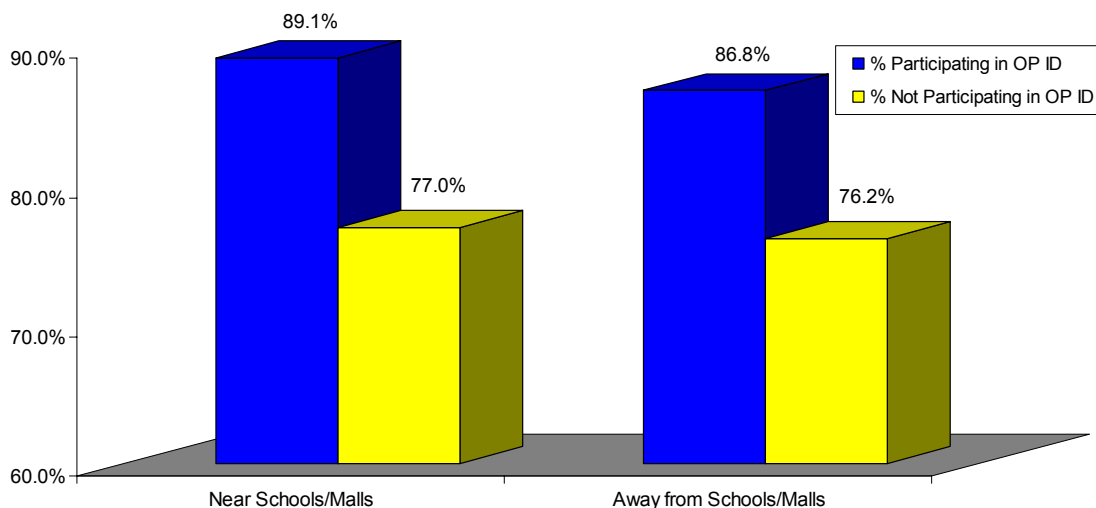
In regards to the gender of the minor, compliance levels are higher in cases where the retailer participated in "Operation ID" versus non-participants (*Chart 12*). Participating retailers are more likely to refuse a sale to female teens than they are to male teens, and non-participating retailers are more likely to refuse a sale to male teens.

Chart 12 – Weighted – National Sales-to-Minors Compliance by Gender of Teen Based on Retailer Participation in "Operation ID" – 2005



Retailers participating in "Operation ID" are more likely to refuse a sale to a minor, regardless of their proximity to a school and/or mall (*Chart 13*).

Chart 13 – Weighted – National Sales-to-Minors Compliance Based on Proximity to Schools/Malls & Retailer Participation in "Operation ID" – 2005



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Table 17 – Weighted – Sales-to-Minors Compliance Results by City/Province/Region Based on Retailer Participation in “Operation ID” – 2005

Region	All Stores	Retailer Sales-To-Minors Compliance Stores Not Participating in "Operation ID"	Retailer Sales-To-Minors Compliance in Stores Participating in "Operation ID"	Compliance Point Difference	Likely That Change is Statistically Significant (Yes/No)
NATIONAL	80.8%	76.4%	87.8%	11.4%	Yes
ST. JOHN'S (NL)	98.4%	100.0%	97.4%	-2.6%	Yes
CHARLOTTETOWN (PEI)	90.1%	96.3%	87.0%	-9.3%	Yes
NEW BRUNSWICK	84.1%	90.7%	79.1%	-11.6%	Yes
BATHURST	84.2%	75.7%	100.0%	24.3%	Yes
FREDERICTON	94.3%	100.0%	92.9%	-7.1%	Yes
MONCTON	61.1%	75.7%	54.1%	-21.6%	Yes
SAINT JOHN	99.0%	100.0%	97.1%	-2.9%	Yes
NOVA SCOTIA	84.5%	85.5%	82.4%	-3.1%	Yes
HALIFAX	80.5%	81.6%	78.6%	-3.0%	Yes
SYDNEY	92.5%	92.2%	93.6%	1.5%	No
QUEBEC	70.4%	68.8%	76.2%	7.3%	Yes
CHICOUTIMI JONQUIERE	90.7%	100.0%	90.6%	-9.4%	Yes
MONTREAL	69.5%	69.8%	66.8%	-3.0%	Yes
QUEBEC CITY	68.3%	60.8%	75.5%	14.7%	Yes
SHERBROOKE	73.3%	70.5%	87.9%	17.4%	Yes
ONTARIO	77.1%	70.4%	89.1%	18.7%	Yes
KINGSTON	94.4%	91.8%	96.6%	4.7%	Yes
OTTAWA	91.0%	89.1%	91.9%	2.9%	Yes
ST. CATHARINES	86.5%	79.3%	95.2%	15.9%	Yes
SUDBURY	88.1%	90.9%	87.7%	-3.2%	Yes
THUNDER BAY	66.5%	53.7%	81.3%	27.6%	Yes
TORONTO	69.7%	65.9%	84.1%	18.2%	Yes
WINDSOR	94.2%	93.3%	95.1%	1.7%	No
MANITOBA	72.0%	67.1%	79.6%	12.6%	Yes
BRANDON	77.2%	N/A	77.2%	N/A	N/A
WINNIPEG	71.6%	67.1%	80.3%	13.2%	Yes
SASKATCHEWAN	96.0%	95.7%	100.0%	4.3%	Yes
REGINA	92.9%	92.7%	100.0%	7.3%	Yes
SASKATOON	99.0%	98.8%	100.0%	1.2%	No
ALBERTA	84.7%	79.5%	88.7%	9.2%	Yes
CALGARY	90.3%	88.1%	91.3%	3.2%	Yes
EDMONTON	78.4%	72.5%	87.0%	14.5%	Yes
MEDICINE HAT	88.8%	93.6%	87.3%	-6.3%	Yes
RED DEER	78.3%	89.9%	71.9%	-17.9%	Yes
BRITISH COLUMBIA	91.8%	89.6%	94.0%	4.4%	Yes
KELOWNA	94.1%	89.2%	94.5%	5.4%	Yes
CAMPBELL RIVER COURTENAY	78.5%	74.8%	83.6%	8.8%	Yes
VANCOUVER CMA	92.8%	91.0%	94.7%	3.6%	Yes
VANCOUVER 1	87.1%	85.9%	88.6%	2.6%	Yes
VANCOUVER 2	96.2%	92.7%	99.3%	6.6%	Yes
VANCOUVER 3	94.3%	93.8%	94.7%	0.9%	No
VANCOUVER 4	98.2%	96.9%	100.0%	3.1%	Yes

N/A = Not Applicable; "Operation I.D." was observed in all of Brandon retailers surveyed.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Section 2.0 – Posting of Age/Health Advisory Signs

Of concern herein are the observations regarding retailer compliance with the sign provisions of sales-to-minors legislation across Canada.

Federal and provincial sales-to-minors legislation regulates the posting of age advisory and/or tobacco health-warning signs in retail establishments where tobacco products are sold. The number and type of signs that must be posted in each establishment varies by province, depending upon the legislation in effect. The legislation stipulates certain required positions for the signs; however, the law also uses the words “on or near” these required positions. Since the term “near” is loosely defined and the focus of this study is for research purposes to verify if retailers are abiding by the general spirit of the law and not for enforcement, our results for sign compliance are reported *not* taking position into account. Simply the presence of the mandatory signs or absence of unauthorized signs suffices.

The federal mandatory sign requirements have not changed since the last survey performed in 2004.

A liberal definition of compliance was adopted for this portion of the research. Compliance was assumed to exist, provided that retailers respected these minimum fundamental requirements of the legislation:

- that every type of mandatory sign designed to be visible to the customer was posted; and
- that, in Quebec, Manitoba and Alberta, where federal law prevails, signs were posted in both official languages. Since the federal sign is printed only in a bilingual format, this observation was mute – if the sign was there, it would have been in both languages.

The presence of signs designed to be visible only to the cashier, or those designated as optional, were not measured and do not factor into the results. We were not concerned with signs not posted exactly where the law stipulated, provided they were present and visible to the customer. The only attempt to verify that signs met the size provisions stipulated in some of the legislation is in the case of Nova Scotia's *Tobacco Access Act* "Health Warning" sign. In all other cases, we did not deduct points for the failure of retailers to meet size provisions.

One requirement on which there was no compromise was that the signs posted be only those officially sanctioned under the tobacco laws of the province. No credit was given for the presence of any other tobacco age/health-advisory sign: whether hand-drawn by the retailer, issued by an outside organization or even by a government health authority.

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Manitoba's Non-Smokers Health Protection Amendment Act (Bill 37) that amended the Non-Smokers Health Protection Act received Royal Assent on August 9, 2002. The amendment included a ban on displays of tobacco or tobacco-related products in most retail premises where such displays would be visible to children and a ban on advertising and promotion of tobacco and tobacco-related products in most retail premises where children are permitted access. These provisions did not come into force until January 1, 2004. However, Manitoba did not start enforcing the law with respect to display, advertising and promotion until after the Supreme Court decision in January 2005 on similar legislation in Saskatchewan and after further consultation with retailers. The provisions came into effect August 15, 2005.

Saskatchewan requires that their provincial sign be posted advising "It is illegal to provide tobacco to anyone under 18" and "Government supplied ID is required". Age restricted signs & signs containing a health warning message are not allowed unless previously approved by Saskatchewan Health. At this time, Saskatchewan Health has not approved any other age-restricted or health warning signage, other than its own, for posting at retail. "Operation ID" signs which have an age-restricted message are not allowed to be displayed; however, most other "Operation ID" signs are permitted, including training material. Advertising and promotion of tobacco and tobacco-related products is also not permitted in retail establishments that allow young persons (under the age of 18) access, however, outdoor signs stating the generic product and price are allowed.

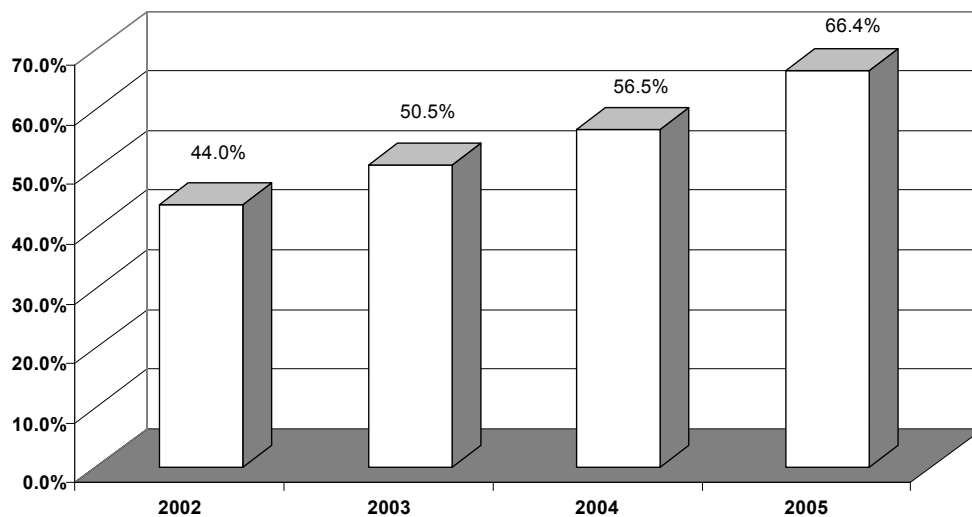
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2.1 Overall Compliance – National

Approximately two-thirds (66.4%) of all weighted outlets comply with sign provisions, an increase over last year's result of 56.5%. This figure represents the weighted percentage of retailers across all 30 cities visited that met every sign compliance condition we measured.

Compliance is on the rise from previous years. Since 2002, the trend is to increase about 6% to 10% annually.

Chart 14 – Weighted – National – % Retailers in Compliance with Signs under Federal & Provincial Tobacco Legislation – All Outlets



Note: Sign laws have changed over the years and results may not be perfectly comparable from one year to the next. Caution should be exercised when analyzing results for comparative purposes.

The figures in the chart above reflect the national percentage of retailers who post every mandatory sign at every designated location on their premises, as prescribed under federal or provincial laws. In New Brunswick, for example, there are as many as three mandatory signs requiring posting. If retailers failed to post even one of these signs, they would not factor into the national compliance figure shown. In provinces where designated signs must also be posted in both official languages, any retailer posting a sign in English only or French only would also be excluded from the compliance average and, indeed, would bring down the national compliance rate. The greater the number of individual requirements a retailer must satisfy with respect to the sign provisions of the *Tobacco Act* or provincial equivalent, the greater the chances that one condition will not be met and that compliance in that region will be lower than elsewhere. At the national level, the number of mandatory requirements cuts across

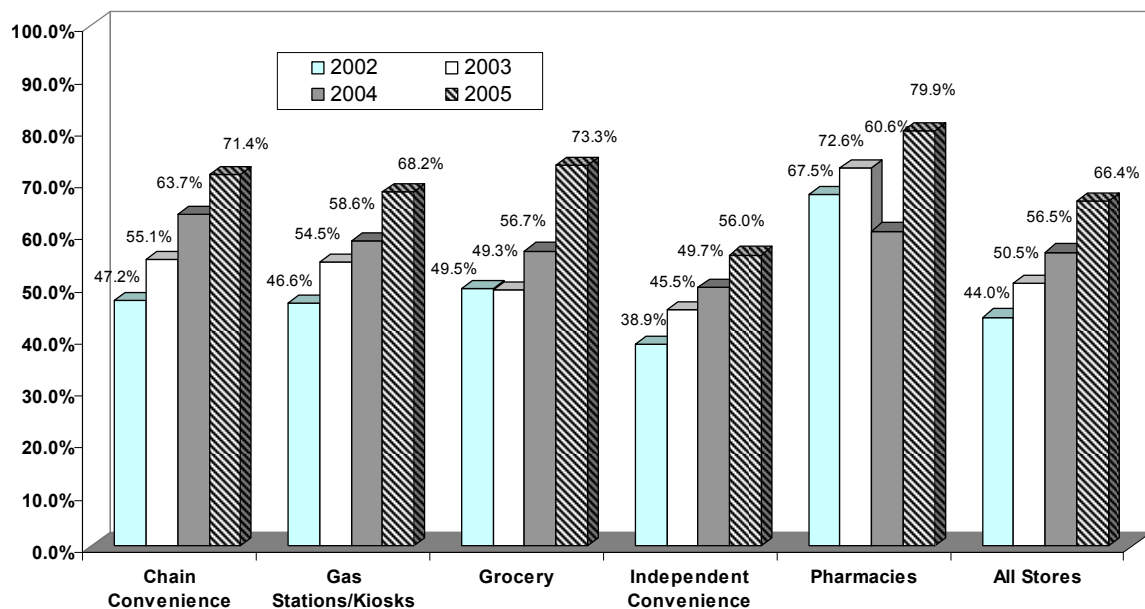
Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

eight different laws and numerous combinations of signs, their language and their location.

2.2 Compliance by Class of Trade

The compliance with tobacco sign laws is on a consistent improvement trend. Although there was a drop in pharmacy compliance in 2004, this class of trade has the highest level of compliance in 2005 (*Chart 15*). Independent convenience is the only class of trade that fell below national average. This is consistent with previous years.

Chart 15 – Weighted – National – % Retailers in Compliance with Posting of Signs by Class of Trade – Trended



Across regions, the following highlights are noted by class of trade (*Table 18*):

Chain Convenience:

This class of trade has the third highest compliance rate and bettering the national average by 5.0%. Sixteen of the cities and six of the provinces visited surpassed the national average.

Gas Stores/Kiosks:

This class of trade only marginally surpassed the national average, with 10 cities scoring better.

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Grocery:

This class of trade has the second highest tobacco sign compliance after pharmacies with 73.3%. Four cities, St. John's, Moncton, Red Deer and Chicoutimi/Jonquiere scored 100% sign compliance in grocery outlets. Fourteen cities scored better than the national average.

Independent Convenience:

This class of trade is the only one to score below the national average with a 56.0% tobacco sign compliance rate. Independent convenience outlets represent 32.8% of the outlets visited and, therefore, have a greater weight on the national extrapolation. Sixteen cities scored above the national average.

Pharmacies:

With representation in only five of the ten provinces and only 6.5% of the sample visited, pharmacies show the highest tobacco sign compliance of all class of trades (79.9%). Of the 12 cities having pharmacies selling tobacco, six scored above the national average.

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Table 18 – Weighted – Full Sign Compliance by Class of Trade – % Retailers Posting All Signs in All Places as Required – 2005

Region	All Stores	Chain Convenience	Gas Station/Kiosks	Grocery	Independent Convenience	Pharmacies
NATIONAL	66.4%	71.4%	68.2%	73.3%	56.0%	79.9%
ST. JOHN'S (NL)	89.9%	100.0%	97.6%	100.0%	75.0%	95.0%
CHARLOTTETOWN (PEI)	33.2%	8.3%	44.1%	54.5%	21.2%	N/A
NEW BRUNSWICK	67.6%	74.7%	70.2%	60.9%	65.6%	N/A
BATHURST	63.5%	N/A	60.0%	66.7%	65.2%	N/A
FREDERICTON	67.8%	100.0%	47.8%	66.7%	73.5%	N/A
MONCTON	91.7%	83.3%	90.5%	100.0%	94.4%	N/A
SAINT JOHN	44.2%	37.5%	59.3%	22.2%	44.4%	N/A
NOVA SCOTIA	34.8%	43.0%	33.1%	46.2%	32.0%	N/A
HALIFAX	27.3%	43.5%	29.7%	50.0%	18.8%	N/A
SYDNEY	50.2%	41.7%	38.9%	40.0%	60.9%	N/A
QUEBEC	60.9%	78.1%	63.4%	71.2%	52.5%	N/A
CHICOUTIMI						
JONQUIERE	99.1%	100.0%	96.9%	100.0%	100.0%	N/A
MONTREAL	60.3%	81.3%	65.0%	73.3%	50.6%	N/A
QUEBEC CITY	58.1%	67.2%	56.3%	63.2%	52.8%	N/A
SHERBROOKE	44.3%	58.8%	31.0%	57.1%	44.7%	N/A
ONTARIO	58.8%	60.3%	62.4%	62.3%	52.8%	N/A
KINGSTON	34.7%	25.0%	33.3%	37.5%	40.5%	N/A
OTTAWA	47.5%	40.0%	50.7%	60.0%	40.4%	N/A
ST. CATHARINES	73.9%	75.0%	69.6%	59.1%	81.1%	N/A
SUDBURY	52.1%	23.5%	57.1%	58.8%	57.5%	N/A
THUNDER BAY	64.5%	83.3%	65.4%	75.0%	50.0%	N/A
TORONTO	60.9%	63.7%	66.7%	64.4%	52.9%	N/A
WINDSOR	54.6%	68.5%	57.1%	62.5%	41.3%	N/A
MANITOBA	70.7%	73.8%	66.2%	73.0%	57.4%	80.0%
BRANDON	85.1%	100.0%	73.7%	50.0%	100.0%	100.0%
WINNIPEG	69.4%	72.2%	65.3%	75.0%	52.7%	78.6%
SASKATCHEWAN	69.8%	59.7%	71.5%	83.7%	67.7%	68.4%
REGINA	75.9%	55.6%	77.4%	90.0%	86.2%	72.0%
SASKATOON	64.1%	64.0%	65.0%	77.8%	53.6%	65.5%
ALBERTA	83.2%	88.7%	80.1%	93.0%	76.1%	83.5%
CALGARY	90.3%	96.6%	89.3%	95.6%	89.2%	86.3%
EDMONTON	78.3%	78.9%	71.8%	91.2%	63.0%	84.1%
MEDICINE HAT	53.5%	80.0%	58.3%	77.8%	46.2%	38.5%
RED DEER	87.2%	83.3%	81.8%	100.0%	76.9%	100.0%
BRITISH COLUMBIA	70.2%	80.8%	68.6%	73.2%	65.3%	72.4%
KELOWNA	87.4%	100.0%	84.1%	91.7%	83.3%	90.0%
CAMPBELL RIVER						
COURTENAY	69.2%	75.0%	63.6%	75.0%	69.6%	71.4%
VANCOUVER CMA	68.8%	79.8%	67.3%	70.8%	63.5%	71.2%
VANCOUVER 1	65.8%	84.1%	57.7%	64.9%	61.6%	69.7%
VANCOUVER 2	79.9%	78.6%	79.7%	85.3%	71.4%	87.5%
VANCOUVER 3	59.6%	75.0%	59.4%	65.9%	52.6%	58.3%
VANCOUVER 4	75.1%	80.0%	83.3%	68.8%	68.8%	76.9%

N/A indicates that the respective class of trade does not sell tobacco products in the identified region.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

2.3 Overall Compliance by Region

The national sign compliance rate continues to increase each year; however, decreases in 12 cities over the 2004 study kept the national rate low (66.4%). The straight average of the decreases across all 12 cities is -15.5%. The largest and most significant decreases (i.e., double digit) occurred in seven cities, where the straight average of the drop is -24.0% (*Table 19*). These cities are:

- Saint John (-39.3 points)
- Sydney (-42.7 points)
- Sherbrooke (-23.6 points)
- Charlottetown (-18.0 points)
- Thunder Bay (-16.8 points)
- Halifax (-15.5 points)
- Fredericton (-12.0 points)

These communities represent several provinces and are legislated under a variety of tobacco laws.

In 18 of the 30 cities visited, an increase in tobacco sign compliance was reported with a straight average of 28.4%. Double-digit increases occurred in 15 of them:

- Chicoutimi/Jonquiere (+76.1 points)
- St. John's (+64.2 points)
- Medicine Hat (+50.4 points)
- Red Deer (+55.3 points)
- Moncton (+43.0 points)
- Bathurst (+33.0 points)
- Ottawa (+28.8 points)
- Campbell River/Courtenay (+ 23.9 points)
- Kingston (+22.4 points)
- Regina (+21.2 points)
- Sudbury (+19.8 points)
- Montreal (+18.2 points)
- Toronto (+17.0 points)
- Calgary (+15.3 points)
- Kelowna (+14.6 points)

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Sixteen cities scored below the national average of 66.4%:

Many of the cities are from provinces where tobacco law requires more than the posting of a single mandatory sign. In Ontario, for example, the law requires that three different signs be posted. The poor showing in Toronto, Kingston, Ottawa and Sudbury is directly attributable to retailers in these cities routinely posting only two of the three necessary signs, failing mostly to post the "No Smoking" sign also demanded by the law.

Highest compliance was found in 10 cities, where compliance was 70% or better:

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table 19 – Weighted – % Retailer Sign Compliance by Region – All Outlet Types – 2005 vs. 2004 Results

Region	2004	2005	Net Change
NATIONAL	56.5%	66.4%	9.9%
ST. JOHN'S (NL)	25.6%	89.9%	64.2%
CHARLOTTETOWN (PEI)	51.2%	33.2%	-18.0%
NEW BRUNSWICK	66.1%	67.6%	1.6%
BATHURST	30.6%	63.5%	33.0%
FREDERICTON	79.7%	67.8%	-12.0%
MONCTON	48.7%	91.7%	43.0%
SAINT JOHN	83.5%	44.2%	-39.3%
NOVA SCOTIA	59.8%	34.8%	-25.0%
HALIFAX	42.7%	27.3%	-15.5%
SYDNEY	93.0%	50.2%	-42.7%
QUEBEC	49.9%	60.9%	11.0%
CHICOUTIMI			
JONQUIERE	23.0%	99.1%	76.1%
MONTREAL	42.0%	60.3%	18.2%
QUEBEC CITY	63.3%	58.1%	-5.2%
SHERBROOKE	67.9%	44.3%	-23.6%
ONTARIO	46.8%	58.8%	11.9%
KINGSTON	12.3%	34.7%	22.4%
OTTAWA	18.7%	47.5%	28.8%
ST. CATHARINES	80.2%	73.9%	-6.3%
SUDBURY	32.4%	52.1%	19.8%
THUNDER BAY	81.3%	64.5%	-16.8%
TORONTO	43.9%	60.9%	17.0%
WINDSOR	55.3%	54.6%	-0.7%
MANITOBA	71.0%	70.7%	-0.3%
BRANDON	87.2%	85.1%	-2.1%
WINNIPEG	68.9%	69.4%	0.5%
SASKATCHEWAN	62.6%	69.8%	7.2%
REGINA	54.7%	75.9%	21.2%
SASKATOON	68.4%	64.1%	-4.2%
ALBERTA	68.1%	83.2%	15.1%
CALGARY	75.0%	90.3%	15.3%
EDMONTON	78.0%	78.3%	0.3%
MEDICINE HAT	3.1%	53.5%	50.4%
RED DEER	31.8%	87.2%	55.3%
BRITISH COLUMBIA	61.7%	70.2%	8.5%
KELOWNA	72.8%	87.4%	14.6%
CAMPBELL RIVER			
COURTENAY	45.2%	69.2%	23.9%
VANCOUVER CMA	62.2%	68.8%	6.6%
VANCOUVER 1	62.9%	65.8%	2.8%
VANCOUVER 2	69.8%	79.9%	10.1%
VANCOUVER 3	55.5%	59.6%	4.1%
VANCOUVER 4	58.7%	75.1%	16.4%

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

2.4 Sign Compliance by Provincial Legislative Component

Table 20 shows retailer compliance by each individual sign component for signs mandated under the *Tobacco Act* or corresponding provincial legislation.

Twenty-four of the 30 cities visited (80%) achieved a sign compliance of 50% or better, with the following cities ranking in the top five:

- Chicoutimi/Jonquiere 99.1%
- Moncton 91.7%
- Calgary 90.3%
- St. John's (NL) 89.9%
- Kelowna 87.4%

Regionally, the provinces and cities where sign compliance is low are typically those where one or another version of the required age restriction signs are posted, but where retailers fail to post these signs equally in all the prescribed places, or where they are less disciplined in posting ancillary signs.

In Saskatchewan, the province's tobacco law prohibits the posting of signs other than those expressly allowed. Mandatory signs are the two issued by the province. In addition to these, but not in place of them, the federal age restriction sign designated under the *Tobacco Act* is also allowed. In all, almost all of Saskatchewan retailers (69.8%) met the new sign requirement in its entirety. This figure is an improvement from last year (62.6%).

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Table 20 – Weighted – Retailer Compliance with Mandatory Tobacco Sign Provisions – 2005

How to Interpret This Table

The figures in the column labelled "Full Compliance" indicate those retailers posting every required sign in the region shown and, in the case of the national figure, across all regions in the country.

Region	Sign Presence					Full Compliance	Sign Observations Not Related to Compliance	
NATIONAL						66.4%		
Newfoundland	Sign A (Health Warning/Age Restriction)					A	In All Required Positions	In Both Languages
ST. JOHN'S	89.9%					89.9%	81.0%	32.8%
Prince Edward Island	Sign A (Health Warning)	Sign B (Age Restriction/Photo I.D.)	Sign C (Age Restriction/Photo I.D.)			A&B&C		
CHARLOTTETOWN	91.3%	52.5%	39.8%			33.2%	36.5%	N/A
New Brunswick	Sign A (Age Restriction)	Sign B (Health Warning)	Sign C (Age Restriction)			A&B&C		
NEW BRUNSWICK	77.8%	83.6%	79.4%			67.6%	66.2%	74.6%
BATHURST	82.1%	93.0%	82.1%			63.5%	92.1%	92.1%
FREDERICTON	75.9%	82.4%	71.0%			67.8%	70.7%	69.3%
MONCTON	93.6%	93.6%	96.6%			91.7%	92.4%	96.6%
SAINT JOHN	61.9%	71.7%	67.9%			44.2%	28.5%	51.7%
Nova Scotia	Sign A (Health Warning/Age Restriction)	Sign B (Health Warning/Age Restriction/Photo I.D.)	Sign C (Health Warning/Age Restriction/Photo I.D.)	Sign D (Health Warning - small)	Sign D (Health Warning - large)	A&B&C + one of D		
NOVA SCOTIA	84.0%	71.8%	60.7%	57.7%	65.1%	34.8%	46.8%	N/A
HALIFAX	76.9%	65.1%	50.9%	51.7%	62.2%	27.3%	37.6%	N/A
SYDNEY	98.4%	85.6%	80.9%	70.0%	70.9%	50.2%	65.6%	N/A
Quebec	Sign A (Federal - Age Restriction)	Sign B (Health Warning/Age Restriction)				A or B		
QUEBEC	57.1%	28.5%				60.9%	17.7%	41.5%
CHICOUTIMI								
JONQUIERE	99.1%	0.0%				99.1%	0.0%	0.9%
MONTREAL	59.7%	26.1%				60.3%	16.7%	48.8%
QUEBEC CITY	38.7%	48.5%				58.1%	29.7%	23.4%
SHERBROOKE	44.3%	12.7%				44.3%	1.9%	31.6%
Ontario	Sign A (Health Warning/Age Restriction)	Sign B (Age Restriction)	Sign C (No Smoking)			A&B&C		
ONTARIO	82.3%	79.5%	71.3%			58.8%	47.5%	19.9%
KINGSTON	75.3%	77.2%	50.0%			34.7%	34.7%	0.0%
OTTAWA	92.0%	87.9%	53.0%			47.5%	37.8%	15.6%
ST. CATHARINES	92.2%	86.5%	87.0%			73.9%	71.5%	32.5%
SUDBURY	97.2%	87.1%	58.6%			52.1%	42.0%	4.4%
THUNDER BAY	94.0%	79.0%	77.6%			64.5%	63.4%	10.1%
TORONTO	77.4%	76.3%	73.4%			60.9%	44.9%	23.5%
WINDSOR	81.1%	77.8%	84.6%			54.6%	62.4%	0.0%
Manitoba	Sign A (Federal - Age Restriction)					A		
MANITOBA	70.7%					70.7%	67.5%	70.7%
BRANDON	85.1%					85.1%	62.4%	85.1%
WINNIPEG	69.4%					69.4%	68.0%	69.4%
Saskatchewan	Sign A (Health Warning/Age Restriction/Photo I.D.)	Absence of Other Non-Authorized Signs Posted				A & Absence of Non-Authorized		
SASKATCHEWAN	91.2%	77.5%				69.8%		N/A
REGINA	90.8%	84.7%				75.9%		N/A
SASKATOON	91.5%	70.7%				64.1%		N/A
Alberta	Sign A (Age Restriction)					A		
ALBERTA	83.2%					83.2%	80.9%	83.2%
CALGARY	90.3%					90.3%	86.1%	90.3%
EDMONTON	78.3%					78.3%	77.1%	78.3%
MEDICINE HAT	53.5%					53.5%	57.2%	53.5%
RED DEER	87.2%					87.2%	87.2%	87.2%
British Columbia	Sign A (Health Warning)	Sign B (Health Warning/Age Restriction/Photo I.D.)				A&B		
BRITISH COLUMBIA	82.3%	81.6%				70.2%	80.2%	N/A
KELOWNA	90.3%	97.2%				87.4%	92.6%	N/A
CAMPBELL RIVER								
COURTENAY	95.6%	72.6%				69.2%	95.6%	N/A
VANCOUVER CMA	80.5%	81.0%				68.8%	77.8%	N/A
VANCOUVER 1	70.5%	82.1%				65.8%	65.9%	N/A
VANCOUVER 2	87.7%	89.2%				79.9%	87.5%	N/A
VANCOUVER 3	83.7%	70.4%				59.6%	82.3%	N/A
VANCOUVER 4	86.2%	84.5%				75.1%	80.5%	N/A

N/A = Not applicable, i.e., not observed.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

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Part B – Tobacco Advertisements at Point of Sale (POS)

The distribution of tobacco advertising at POS measurements was established as follows:

- for all outlets and by trade class, an indication of the number and type of in-outlet tobacco promotional items in these outlets, including counter-top displays, shelf-talkers, danglers, posters and other promotional merchandise¹²; and
- for chain convenience, independent convenience outlets and gas stores/kiosks, the information on the same tobacco POS materials listed above, reported by major tobacco brand name.

These parameters are similar to those of previous studies, and the current findings build on results of past measurements. This year's measurement is the fifth taken following the date when a total ban on tobacco sponsorship advertising at POS was imposed by the federal government. The first measurement taken after the ban was in 2000. Prior to the ban, sponsorship-related advertising represented a major portion of tobacco advertisements at retail. The latest survey, therefore, provides an indication of the evolution of tobacco POS merchandising since sponsorship restrictions were imposed a few years ago. It should be clarified that the use of the word "advertising" or "ad" in this section refers more accurately to tobacco merchandising and promotional materials at POS.

To qualify as a tobacco ad, promotional materials had to identify tobacco brand names, logos or trademarks directly. Any promotional materials void of such identifying trademarks did not receive distribution credit, even if these materials depicted events, images or bore colours that are associated with tobacco products or the companies that manufacture them.

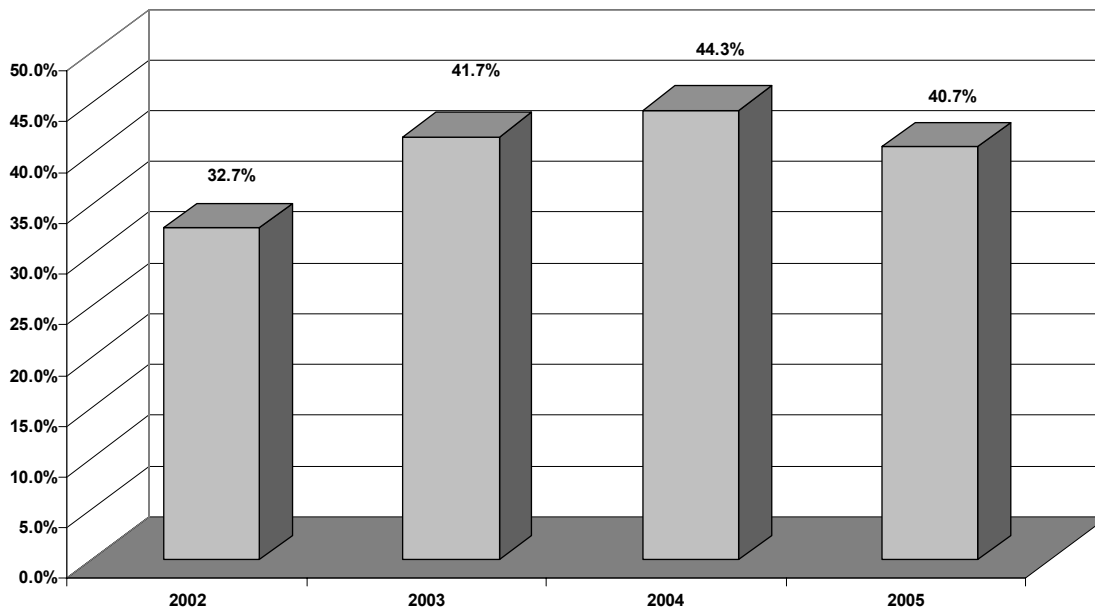
¹² The definition of "posters" is self-explanatory. Broad definitions of the other forms of point-of-sale advertising are these: "counter-top displays": tobacco displays either supplied by the manufacturer or set up by the retailer that are small enough to sit on the counter. A display credit will have been given whether or not an advertising backboard was attached; "danglers" are merchandising pieces or strips of paper affixed to the shelf and that overhang the advertised tobacco brands; "shelf-talkers" are two-dimensional ad strips that are attached flat to the shelf; "other promotional merchandise" include objects such as wall clocks or calendars that have tobacco brand names or corporate trademarks printed on them. Display credits were given to POS materials promoting tobacco-sponsored events if these bore tobacco trademarks, but were not given to any retailer signs (hand-drawn or otherwise) advertising tobacco products for sale in their outlet. Prefabricated tobacco elements to which facings are mounted on the regular power wall were treated as regular facings, and not given distribution credit.

Section 1.0 – General Trends in Tobacco POS Advertising

1.1 Distribution of POS Advertising

Reversing the trend of increasing POS signs in retail establishments is a lower distribution of POS signs this year across the nation at 40.7% versus 44.3% last year (see *Chart 16*).

Chart 16 – Weighted – National % of All Outlets with Tobacco Ads – 2002-2005



No more than 15% of outlets had any one particular sign distribution (*Table 21*). This year, both shelf-talkers and counter-top displays had the highest presence in outlets with each being found in 15% of all outlets. Counter-top displays held the lead last year with 24.2% distribution and 33.0% distribution the previous year.

Following the ban on tobacco sponsorship advertising, tobacco companies realigned their in-outlet merchandising vehicles. The traditional predominance of posters was replaced by the shift to counter-top displays. The new trend of POS signs looks as if the reduction of the counter-top displays is being offset with an equal distribution and increase of the other sign types, shelf-talkers, and posters.

Only posters and other ad types have increased in presence over last year. All other signs reduced in numbers with the largest decline belonging to counter-top displays at -9.2%.

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Table 21 – Weighted – National % of All Outlets with POS Advertising by Type of Ad – 2002-2005

Ad Types	2002	2003	2004	2005
All Ad Types	32.7%	41.7%	44.3%	40.7%
Danglers	0.7%	5.7%	10.2%	9.1%
Shelf-Talkers	3.1%	4.2%	19.3%	15.0%
Posters	1.2%	2.4%	12.4%	14.6%
Counter-Top Displays	28.0%	33.0%	24.2%	15.0%
Other Ad Types	2.5%	7.4%	4.8%	5.7%

Compared to 2004, 14 cities out of 30 visited showed an increase in ad distribution, with one city showing no change and the remaining showing decreases (*Appendix Table A-1*).

Regions with double-digit increases are recorded in *Table 22*. In many of the cities, distribution increased by more than 25%. However large this increase may be, the overall national distribution is lower this year than last (*Appendix Table A-1*).

Only five cities in 2005 were greater than 25%, whereas in 2004, increases were shown in twice as many cities over 2003 observations.

Table 22 – Weighted – All Outlets Changes in POS Ad Distribution Across Regions – 2005 vs. 2004 Results % of Outlets with Ads

Cities Where Tobacco Ad Distribution Increased the Most	2004	2005	Diff 2005 vs. 2004
CHARLOTTETOWN (PEI)	4.7%	59.4%	54.8%
QUEBEC CITY	11.6%	59.6%	47.9%
RED DEER	47.7%	95.3%	47.6%
KELOWNA	1.1%	29.4%	28.4%
BRANDON	64.1%	90.7%	26.6%
WINDSOR	17.0%	34.6%	17.6%
CHICOUTIMI/JONQUIERE	66.7%	83.8%	17.1%
SUDBURY	38.1%	54.3%	16.2%
SAINT JOHN	58.2%	72.2%	14.0%
CAMPBELL RIVER/COURTENAY	17.9%	30.0%	12.1%

* Difference may be under or over by 0.1% due to rounding.

The cities where tobacco ad distribution was the highest (i.e., above the national average of 40.7%) are included in *Table 23*. The list includes several cities in which ad distribution increased substantially this year over last.

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Table 23 – Weighted – All Outlets – POS Ad Distribution across Regions – 2005 vs. 2004 Results % of Outlets with Ads

Cities Where Tobacco Ad Distribution Highest This Year	2004	2005	Difference * 2005 vs. 2004
RED DEER	47.7%	95.3%	47.6%
BRANDON	64.1%	90.7%	26.6%
CHICOUTIMI/JONQUIERE	66.7%	83.8%	17.1%
SAINT JOHN	58.2%	72.2%	14.0%
SYDNEY	84.4%	71.4%	-13.0%
QUEBEC CITY	11.6%	59.6%	47.9%
CALGARY	51.1%	59.6%	8.4%
CHARLOTTETOWN (PEI)	4.7%	59.4%	54.8%
BATHURST	58.3%	56.8%	-1.5%
HALIFAX	66.9%	54.3%	-12.6%
SUDBURY	38.1%	54.3%	16.2%
OTTAWA	73.4%	52.4%	-21.0%
THUNDER BAY	45.3%	51.8%	6.5%
SHERBROOKE	69.8%	48.2%	-21.6%

* Difference may be under or over by 0.1% due to rounding.

This year, due to provincial legislation regulating tobacco advertising, Saskatchewan had no tobacco ads on display in outlets where tobacco products are sold.

Fifteen regions showed a decrease in ads, with 12 (80%) showing a double-digit decrease. The highest recorded decreases are in Saskatoon, St. Catharines and Regina, all experiencing drops of more than 50%.

Tobacco ad distribution was lowest (less than 10%) in those cities recorded in *Table 24*.

Table 24 – Weighted – All Outlets – Changes in POS Ad Distribution Across Regions – 2005 vs. 2004 Results % of Outlets with Ads

Cities Where Tobacco Ad Distribution Lowest this Year	2004	2005	Difference 2005 vs. 2004
REGINA	50.8%	0.0%	-50.8%
SASKATOON	56.9%	0.0%	-56.9%
ST. CATHARINES	63.0%	7.8%	-55.2%

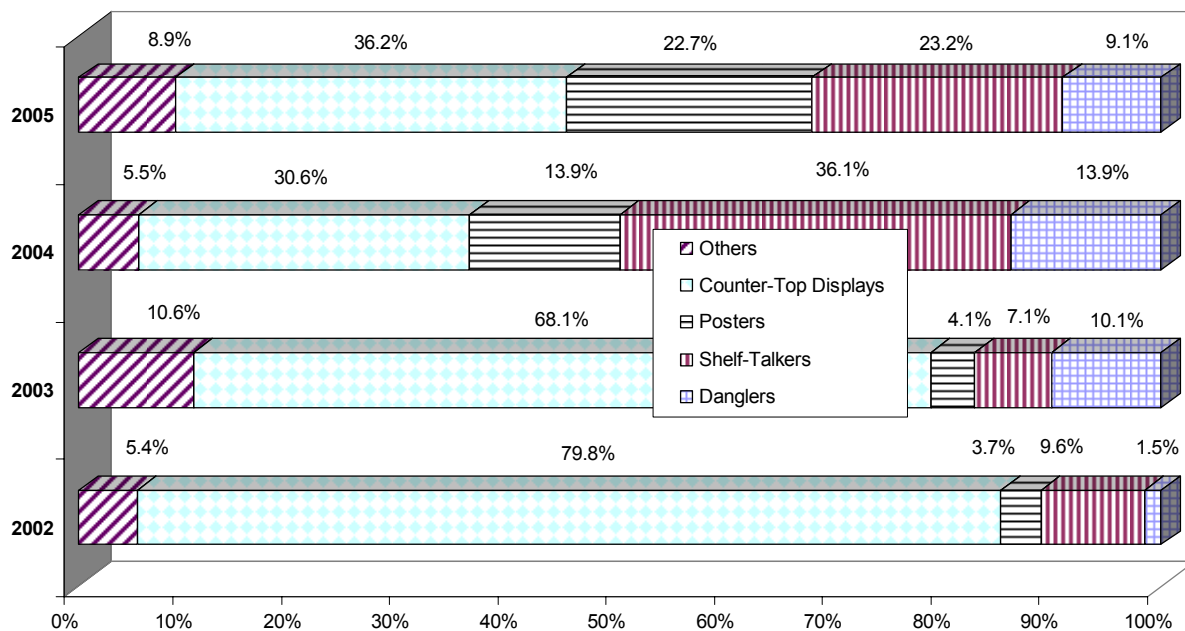
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1.2 POS Ad Share & Number of Ads per Outlet by Type

POS Ad Share by Type

Danglers and shelf-talkers were present less frequently in stores in 2005 over 2004, a decrease of 4.8% and 12.9%, respectively. Counter-top displays increased by 5.6% and posters by 8.8%. Counter-top displays make up more than one-third of all ads in stores with posters and shelf-talkers making up just under half of all signs in stores.

Chart 17 – Weighted – National – % Share of Ads by Type – 2002-2005



Statistics relative to share of POS ads are:

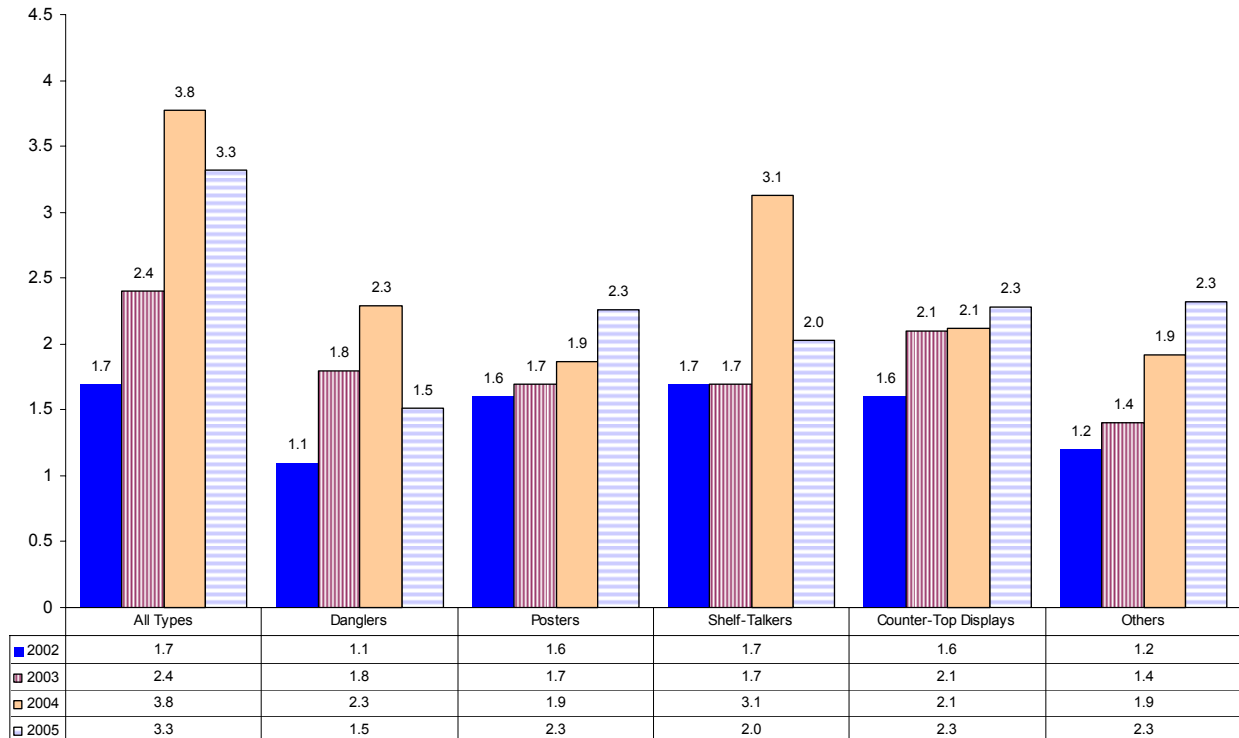
- Counter-top displays, shelf-talkers and posters represent 82.1% of all ads in outlets;
- Share of signs this year are more evenly distributed among three types (counter-top displays, shelf-talkers and posters) rather than just counter-top displays and shelf-talkers (66.7%) last year;
- Cities with the highest distribution of ads are Red Deer, Brandon, Chicoutimi/Jonquiere, Saint John, Sydney, Quebec City, Calgary, and Charlottetown (*Appendix Table A-1*); and
- Of the two largest provinces, Quebec had a higher distribution of ads (48.4%) than the national average (40.7%) and Ontario was roughly the same (39.7%) (*Appendix Table A-1*).

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Average Number of Ads by Type per Outlet

In stores carrying POS ads, the average number of ads is 3.3, lower than last year's 3.8 (Chart 18). This corresponds with the reduction in outlets carrying ads (40.7% this year versus 44.3% last year, as shown in Chart 16).

Chart 18 – Weighted – Average Number of Tobacco POS Ads per Outlet Carrying – 2002-2005



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Table 25A – Weighted – Tobacco POS Ad Distribution & Share Summary – All Outlets

Region	Total		Danglers			Posters		
	Proj Dist %	Proj Avg	Proj Dist %	Share	Proj Avg	Proj Dist %	Share	Proj Avg
NATIONAL	40.7%	3.3	22.4%	10.2%	1.5	35.9%	24.4%	2.3
ST. JOHN'S	45.7%	2.5	35.8%	18.1%	1.3	2.5%	1.0%	1.0
CHARLOTTETOWN (PEI)	59.4%	1.4	50.5%	43.4%	1.2	1.7%	2.4%	2.0
NEW BRUNSWICK	45.6%	2.4	42.0%	22.8%	1.3	23.2%	14.1%	1.4
BATHURST	56.8%	1.8	18.7%	12.7%	1.2	77.6%	83.0%	1.9
FREDERICTON	36.8%	2.4	5.8%	3.7%	1.5	54.9%	28.4%	1.2
MONCTON	23.5%	1.3	71.3%	64.7%	1.2	0.0%	0.0%	0.0
SAINT JOHN	72.2%	2.9	52.6%	24.5%	1.3	5.6%	2.0%	1.0
NOVA SCOTIA	59.9%	1.8	33.3%	22.8%	1.2	22.3%	16.7%	1.3
HALIFAX	54.3%	1.8	30.8%	20.6%	1.2	4.3%	2.4%	1.0
SYDNEY	71.4%	1.7	37.1%	26.5%	1.2	50.3%	40.2%	1.4
QUEBEC	48.4%	3.8	12.6%	4.6%	1.4	64.9%	47.0%	2.8
CHICOUTIMI/ JONQUIERE	83.8%	4.9	5.5%	1.4%	1.3	97.4%	47.8%	2.4
MONTREAL	43.6%	2.7	17.9%	8.9%	1.3	58.0%	37.4%	1.7
QUEBEC CITY	59.6%	7.3	1.4%	0.8%	4.3	80.3%	58.3%	5.3
SHERBROOKE	48.2%	2.0	1.4%	0.7%	1.0	34.7%	31.3%	1.8
ONTARIO	39.7%	2.9	32.7%	15.6%	1.4	34.5%	18.1%	1.5
KINGSTON	40.1%	2.5	0.0%	0.0%	0.0	85.1%	53.0%	1.5
OTTAWA	52.4%	3.1	27.2%	15.4%	1.8	31.1%	21.8%	2.2
ST. CATHARINES	7.8%	1.6	19.7%	14.9%	1.2	0.0%	0.0%	0.0
SUDBURY	54.3%	3.0	10.3%	3.5%	1.0	1.7%	0.6%	1.0
THUNDER BAY	51.8%	1.8	3.6%	2.0%	1.0	5.5%	5.3%	1.7
TORONTO	40.3%	3.0	43.0%	19.5%	1.4	41.2%	19.4%	1.4
WINDSOR	34.6%	3.7	2.2%	1.2%	2.0	3.3%	1.5%	1.7
MANITOBA	26.6%	8.5	28.7%	17.8%	5.3	25.1%	4.1%	1.4
BRANDON	90.7%	25.4	79.5%	19.8%	6.3	9.0%	1.2%	3.5
WINNIPEG	20.7%	1.7	8.2%	5.5%	1.1	31.6%	21.3%	1.1
SASKATCHEWAN	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
REGINA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SASKATOON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
ALBERTA	48.6%	3.2	8.2%	3.1%	1.2	20.7%	10.8%	1.7
CALGARY	59.6%	3.3	8.7%	3.0%	1.1	16.9%	8.6%	1.7
EDMONTON	34.8%	2.7	7.0%	3.9%	1.5	36.1%	22.5%	1.7
MEDICINE HAT	16.0%	1.1	26.9%	33.1%	1.3	0.0%	0.0%	0.0
RED DEER	95.3%	4.9	5.1%	1.0%	1.0	0.0%	0.0%	0.0
BRITISH COLUMBIA	21.7%	3.4	14.1%	7.0%	1.7	12.5%	6.0%	1.6
KELOWNA	29.4%	3.9	0.0%	0.0%	0.0	11.3%	8.6%	2.9
CAMPBELL RIVER COURTENAY	30.0%	2.2	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER CMA	20.3%	3.5	17.6%	8.5%	1.7	14.3%	6.1%	1.5
VANCOUVER 1	19.2%	2.6	0.0%	0.0%	0.0	1.8%	0.7%	1.0
VANCOUVER 2	12.4%	1.8	20.2%	17.0%	1.6	54.0%	50.7%	1.7
VANCOUVER 3	26.8%	4.2	35.5%	15.0%	1.8	8.2%	2.0%	1.0
VANCOUVER 4	25.3%	5.4	8.6%	1.6%	1.0	13.8%	3.3%	1.3

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Table 25B – Weighted – Tobacco POS Ad Distribution & Share Summary – All Outlets

Region	Shelf-Talkers			Counter-Top Displays			Others		
	Proj Dist %	Share	Proj Avg	Proj Dist %	Share	Proj Avg	Proj Dist %	Share	Proj Avg
NATIONAL	36.8%	22.4%	2.0	48.1%	33.1%	2.3	14.1%	9.9%	2.3
ST. JOHN'S	84.2%	75.7%	2.2	0.8%	0.6%	2.0	1.6%	4.5%	7.0
CHARLOTTETOWN (PEI)	58.6%	54.2%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0
NEW BRUNSWICK	67.8%	53.2%	1.9	8.7%	5.1%	1.4	10.4%	4.7%	1.1
BATHURST	7.5%	4.2%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
FREDERICTON	57.5%	46.9%	1.9	37.2%	21.0%	1.3	0.0%	0.0%	0.0
MONCTON	37.1%	35.3%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SAINT JOHN	95.6%	64.9%	1.9	1.4%	1.0%	2.0	20.6%	7.7%	1.1
NOVA SCOTIA	37.1%	29.0%	1.4	16.7%	26.2%	2.8	9.0%	5.3%	1.0
HALIFAX	42.3%	34.1%	1.5	27.5%	42.2%	2.8	0.7%	0.7%	2.0
SYDNEY	29.0%	20.6%	1.2	0.0%	0.0%	0.0	21.9%	12.8%	1.0
QUEBEC	11.2%	3.1%	1.1	65.1%	35.7%	2.1	14.7%	9.6%	2.5
CHICOUTIMI/ JONQUIERE	0.0%	0.0%	0.0	97.1%	50.8%	2.6	0.0%	0.0%	0.0
MONTREAL	14.1%	5.4%	1.0	67.0%	34.0%	1.4	18.8%	14.3%	2.1
QUEBEC CITY	8.4%	1.4%	1.2	43.6%	32.5%	5.4	10.0%	7.0%	5.1
SHERBROOKE	0.0%	0.0%	0.0	92.5%	67.9%	1.5	0.0%	0.0%	0.0
ONTARIO	34.8%	19.2%	1.6	48.1%	26.5%	1.6	26.7%	20.6%	2.3
KINGSTON	19.3%	26.3%	3.3	0.0%	0.0%	0.0	11.2%	20.7%	4.5
OTTAWA	25.0%	19.4%	2.4	23.4%	11.8%	1.6	52.5%	31.5%	1.9
ST. CATHARINES	7.1%	4.5%	1.0	77.3%	67.3%	1.4	7.1%	13.4%	3.0
SUDBURY	34.4%	16.3%	1.4	84.5%	77.4%	2.7	3.4%	2.3%	2.0
THUNDER BAY	0.0%	0.0%	0.0	94.5%	92.7%	1.7	0.0%	0.0%	0.0
TORONTO	41.5%	18.1%	1.3	52.4%	26.3%	1.5	19.7%	16.6%	2.5
WINDSOR	41.7%	37.2%	3.3	31.5%	10.5%	1.2	80.0%	49.6%	2.3
MANITOBA	36.2%	34.0%	8.0	62.2%	43.4%	5.9	1.5%	0.7%	4.0
BRANDON	98.0%	38.4%	9.9	80.0%	40.5%	12.9	0.0%	0.0%	0.0
WINNIPEG	11.3%	7.4%	1.1	55.1%	60.8%	1.8	2.1%	4.9%	4.0
SASKATCHEWAN	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
REGINA	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SASKATOON	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
ALBERTA	53.1%	30.9%	1.9	66.9%	49.9%	2.4	8.0%	5.3%	2.2
CALGARY	60.9%	32.7%	1.8	68.1%	53.0%	2.6	3.1%	2.7%	2.9
EDMONTON	24.1%	12.2%	1.4	63.6%	46.9%	2.0	19.5%	14.4%	2.0
MEDICINE HAT	73.1%	66.9%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
RED DEER	92.1%	54.3%	2.9	82.0%	43.9%	2.6	3.8%	0.8%	1.0
BRITISH COLUMBIA	39.5%	34.0%	2.9	44.6%	43.7%	3.3	14.8%	9.3%	2.1
KELOWNA	47.7%	48.1%	3.9	65.2%	43.3%	2.6	0.0%	0.0%	0.0
CAMPBELL RIVER COURTENAY	73.6%	72.4%	2.2	17.9%	8.1%	1.0	38.8%	19.6%	1.1
VANCOUVER CMA	34.2%	28.8%	2.9	45.3%	46.7%	3.6	13.7%	9.8%	2.5
VANCOUVER 1	65.9%	50.9%	2.0	35.7%	33.4%	2.4	21.3%	15.0%	1.8
VANCOUVER 2	15.1%	8.2%	1.0	21.0%	16.3%	1.4	14.4%	7.8%	1.0
VANCOUVER 3	24.5%	30.2%	5.1	55.0%	41.5%	3.2	8.3%	11.4%	5.8
VANCOUVER 4	8.6%	10.2%	6.3	69.1%	83.1%	6.4	10.0%	1.9%	1.0

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

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1.3 Tobacco Advertising by Class of Trade

Like last year, consumers were more likely to find tobacco POS ads in all other types of outlets than in pharmacies and grocery (Table 26). The highest number of outlets carrying ads is chain convenience (64.3%), with gas stores/kiosks second (46.4%).

Chain convenience outlets remain roughly unchanged from last year (64.7%) and gas stores/kiosks are slightly lower than last year (50.0%). The only trade class showing a marginal (and insignificant) increase from last year is grocery from 11.2% to 12.5%. All other outlets are showing a decrease, subsequently affecting the national average, which is also showing a decrease.

Counter-top displays are the new favourite of POS ad types, showing up in 48.1% of all outlets with ads. Their highest presence is in 51.7% of all grocery outlets with ads. Posters and shelf-talkers have roughly the same distribution across all class of trades, with posters being more popular in independent convenience outlets and shelf-talkers more popular in pharmacies.

The number of ads in outlets has dropped slightly this year to 3.3, from last year's 3.8. The highest number of ads is found in pharmacies at 4.6 and chain convenience at 3.6.

Posters, counter-top displays and other ads all have the highest average of POS ads in outlets at 2.3. Posters have a higher average in chain convenience (2.5); counter-top displays have a higher average in pharmacies (3.9); and other ads in grocery (2.8).

Variations to these observations recorded at the national level may be found across cities and regions (refer to statistical summary tables in the Appendix).

Table 26 – Weighted – Tobacco POS Advertising by Class of Trade All Ads Types – 2005

	All Store Types	Chain Convenience	Gas Stores/Kiosks	Grocery	Independent Convenience	Pharmacies
% Stores Carrying any Ad	40.7%	64.3%	46.4%	12.5%	44.5%	11.7%
Average # All Ads in Store	3.3	3.6	3.2	2.4	3.3	4.6
% Stores with Dangles	22.4%	24.9%	18.9%	7.3%	26.4%	17.3%
Average # Dangles in Store	1.5	1.5	1.6	1.2	1.4	3.4
% Stores with Posters	35.9%	38.8%	33.4%	34.5%	39.0%	11.1%
Average # Posters in Store	2.3	2.5	2.1	1.5	2.3	1.8
% Stores with Shelf-Talkers	36.8%	31.8%	38.2%	24.0%	36.9%	63.0%
Average # Shelf-Talkers in Store	2.0	1.7	2.1	1.6	2.0	2.7
% Stores With Counter-Top Displays	48.1%	51.0%	46.2%	51.7%	48.6%	44.2%
Average # Counter-Top Displays in Store	2.3	2.3	2.2	2.3	2.2	3.9
% Stores with "Other" Ads	14.1%	23.0%	14.1%	7.4%	9.9%	14.3%
Average # "Other" Ads in Store	2.3	2.3	2.3	2.8	2.3	2.7

Note: Summary tables of advertising findings by city by class of trade are provided in the Appendix to this report.

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1.4 Tobacco Advertising by Proximity to Schools and/or Malls

Ad distribution in relation to the retailers' proximity to schools and/or malls bares resemblance to the national overall average in that ad distribution has decreased when compared to last year (*Table 27*).

Ads can be found in 36.5% of retailers located near schools and/or malls and 38.7% elsewhere. This year's results have dropped to levels experienced in the 2002 survey. The difference between the two is only 2.2%; not enough to claim staggering disparity and significant trends between outlets near and far away from schools and/or malls.

Within the class trades, all but one class of trade had greater ad presence in retailers near schools and/or malls. Grocery retailers were the only class of trade with fewer ads in locations near schools and/or malls than away.

Table 27 – Weighted – Tobacco Ad % Distribution Based on Outlet Proximity to Schools and/or Malls – 2002-2005

	2002	2003	2004	2005
All Store Types				
Near	31.5%	43.7%	42.2%	36.5%
Away	33.8%	40.1%	46.3%	38.7%
Chain Convenience				
Near	54.6%	65.6%	67.2%	59.0%
Away	60.4%	62.0%	62.2%	55.2%
Gas Stores/Kiosks				
Near	33.8%	47.2%	50.2%	50.1%
Away	34.2%	42.4%	49.8%	44.7%
Grocery				
Near	10.8%	8.9%	10.6%	9.7%
Away	14.3%	11.8%	12.3%	10.6%
Independent Convenience				
Near	34.3%	48.3%	50.9%	46.6%
Away	32.1%	38.3%	50.3%	42.3%
Pharmacies				
Near	4.6%	25.6%	14.0%	13.2%
Away	4.9%	24.0%	12.7%	9.7%

Section 2.0 – Tobacco POS Advertising by Brand (Selected Classes of Trade)

Data was collected on branded tobacco POS advertising in chain convenience, independent convenience outlets, and gas stores/kiosks. The findings are summarized hereunder for each outlet type.

Advertising support for tobacco brands and trademarks varies across the country (*Appendix Table A-1*):

- The province with the highest distribution of ads is Nova Scotia (59.9%), with most signs being shelf-talkers (37.1%); and
- Ontario had roughly the same as the national average with 39.7% ad distribution with the leading ad type being counter-top displays (48.1%), and Quebec was greater than the national average (48.4%), with the leading ad type being counter-top displays (65.1%). Posters were a close second with 64.9%.

2.1 Chain Convenience (Excluding Independent & Gas Stores/Kiosks)

Distribution

Nationally, the brand with the largest distribution among chain convenience outlets was du Maurier, with a distribution of 16.2%, down significantly from last year's 44.5% when it was also the highest distributed brand (*Table 28*). This distribution rate is only marginally more widespread than "Other" ads (15.3%) and greater than the second most widely distributed brand ad, Players (9.8%).

Even though du Maurier ads have reduced their presence in chain convenience outlets from last year, the national distribution of ads by brands has remained roughly the same, indicating a wider range of brand ad types in chain convenience outlets.

The ranking of brand families with the highest distribution of POS advertising is:

Brand	Distribution
du Maurier	16.2%
"Other" (<i>not specified</i>)	15.3%
Players	9.8%
Export A (<i>excluding Smooth</i>)	8.5%
Benson & Hedges	6.7%

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Regionally, brand ad shares fluctuate with ad distribution.

Average Number of Ads per Outlet – The average number of ads in outlets has dropped from 4.0 to 3.6 this year. This reflects the lower distribution rate this year. Counter-top displays remain the most widely distributed type of ads (32.8%), with posters having the second highest average (25.0%) number in retail establishments.

Table 28 – Weighted – % Distribution and Number of Ads per Outlet by Brand by Type – National Results – Chain Convenience – 2005

Ad Availability Chain Convenience	Total		Counter-Top Displays		Danglers		Posters		Shelf-Talkers		Others	
	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg
Total	29.7%	3.60	32.8%	2.30	16.0%	1.47	25.0%	2.52	20.4%	1.74	14.8%	2.30
Belvedere	3.8%	1.41	1.2%	2.34	2.5%	1.07	1.9%	1.28	2.6%	1.16	0.9%	1.00
Benson & Hedges	6.7%	1.09	2.6%	1.04	1.7%	1.00	6.5%	1.01	1.1%	1.63	2.7%	1.08
Canadian Classics	4.1%	1.30	3.7%	1.33	2.0%	1.09	1.2%	1.00	2.2%	1.16	0.5%	1.00
du Maurier	16.2%	1.45	13.0%	1.25	2.4%	1.46	10.2%	1.19	6.0%	1.43	7.9%	1.34
Export A	8.5%	1.33	5.2%	1.03	1.3%	1.00	6.2%	1.52	3.3%	1.13	3.9%	1.14
Export A Smooth	0.8%	1.13	0.4%	1.00	0.1%	2.00	0.7%	1.00	0.2%	1.89	0.3%	1.00
Remaining Export A	0.5%	1.10	0.1%	1.48	0.1%	1.00	0.8%	1.00	0.0%	N/A	0.3%	1.00
Matinee	3.7%	1.13	2.2%	1.23	1.2%	1.00	2.0%	1.03	0.5%	1.20	2.1%	1.10
Players	0.9%	1.49	7.2%	1.49	3.5%	1.37	5.2%	1.28	5.1%	1.22	2.6%	1.19
Rothmans	0.1%	1.21	0.6%	1.41	0.2%	1.00	0.7%	1.00	0.4%	1.41	0.0%	N/A
Sportsman	0.1%	1.00	0.0%	N/A	0.1%	1.00	0.0%	N/A	0.0%	N/A	0.0%	N/A
Other	15.3%	2.15	16.2%	1.77	5.4%	1.05	11.0%	1.84	5.4%	1.49	5.8%	1.48

Brand Share of Ads – Brand share correlates with brand distribution (*Table 29* and *Appendix Table A-7*). Although dropping from last year's brand share of 27.5%, du Maurier managed to hold on to the second spot with 11.0%, while "Others" took the lead with 15.4%. The top five brands are:

Brand	Share
"Other" (<i>not specified</i>)	15.4%
du Maurier	11.0%
Players	6.8%
Export A (<i>excluding Smooth</i>)	5.3%
Benson & Hedges	3.4%

Brand Advertising by Type of Ad – Although slightly less popular this year (32.6%) over last year (35.9%), counter-top displays are the most popular type of ad. In chain convenience outlets, these types of ads are found in 32.8% of all outlets. Canadian Classics had the highest share of these types of ads at 43.3%.

Posters had the second highest share of ads at 27.2%.

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Table 29 – Weighted – % Share of Ads by Type and by Brand – National Results – Chain Convenience – 2005

Share of Ads - Chain Convenience Stores						
Brand	All Ads	Counter-Top Displays	Danglers	Posters	Shelf-Talkers	Others
Total	100%	32.6%	10.2%	27.2%	15.3%	14.7%
Belvedere	100%	23.8%	23.0%	20.6%	25.3%	7.3%
Benson & Hedges	100%	17.4%	10.5%	41.7%	11.6%	18.7%
Canadian Classics	100%	43.3%	19.5%	10.2%	22.6%	4.4%
du Maurier	100%	31.7%	6.9%	23.8%	16.8%	20.8%
Export A	100%	22.0%	5.3%	38.9%	15.5%	18.4%
Export A Smooth	100%	21.8%	6.3%	39.5%	17.3%	15.2%
Remaining Export A	100%	14.0%	4.6%	62.0%	0.0%	19.5%
Matinee	100%	30.1%	13.4%	23.2%	7.3%	26.0%
Players	100%	33.9%	15.2%	21.1%	19.9%	9.9%
Rothmans	100%	37.7%	10.4%	29.8%	22.0%	0.0%
Sportsman	100%	0.0%	100.0%	0.0%	0.0%	0.0%
Other	100%	40.2%	8.0%	28.4%	11.3%	12.1%

The figures in *Table 30* on the next page summarize the leading advertised brands within each ad type. For each brand listed, we show the brand share of all such ads nationally, the percent (distribution) of all chain convenience outlets carrying at least one ad of that type, and the average number of such ads per outlet carrying.

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Table 30 – Weighted – POS Advertising: Tobacco Brands – Chain Convenience – All Cities – 2005

<i>Ad Type: Counter-Top Displays</i>	Brand Share of CT Displays	% Distribution	Ave. # Displays/Store
Other	37.9%	49.2%	1.8
du Maurier	21.4%	39.5%	1.2
Players	14.2%	21.9%	1.5
Export A	7.1%	15.9%	1.0
Canadian Classics	6.5%	11.4%	1.3
Belvedere	3.7%	3.6%	2.3
<i>Ad Type: Posters</i>	Brand Share of Posters	% Distribution	Ave. # Posters/Store
Other	32.1%	44.2%	1.8
du Maurier	19.3%	40.9%	1.2
Export A	15.1%	24.9%	1.5
Players	10.6%	20.8%	1.3
Benson & Hedges	10.4%	26.1%	1.0
Belvedere	3.8%	7.6%	1.3
<i>Ad Type: Shelf-Talkers</i>	Brand Share of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
du Maurier	24.2%	29.4%	1.4
Other	22.6%	26.4%	1.5
Players	17.7%	25.1%	1.2
Export A	10.6%	16.3%	1.1
Belvedere	8.4%	12.5%	1.2
Canadian Classics	7.3%	10.9%	1.2
<i>Ad Type: Danglers</i>	Brand Share of Danglers	% Distribution	Ave. # Danglers/Store
Other	24.0%	33.7%	1.0
Players	20.3%	21.7%	1.4
du Maurier	15.0%	15.1%	1.5
Belvedere	11.4%	15.7%	1.1
Canadian Classics	9.4%	12.7%	1.1
Benson & Hedges	7.0%	10.3%	1.0
<i>Ad Type: Other Forms</i>	Brand Share of Other Ads	% Distribution	Ave. # Ads/Store
du Maurier	31.2%	53.5%	1.3
Other	25.4%	39.5%	1.5
Export A	13.2%	26.7%	1.1
Players	9.2%	17.8%	1.2
Benson & Hedges	8.7%	18.6%	1.1
Matinee	6.9%	14.4%	1.1

Note: Summary tables of advertising trends in chain convenience by region and type of tobacco ad appear in the Appendix of this report.

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2.2 Independent Convenience Outlets

Distribution – Dropping from last year's 50.6% distribution, independent convenience outlets had a 33.6% distribution this year (*Table 31*), with du Maurier having the widest distribution rate of 16.1%. "Other" was second with a 14.2% distribution rate.

The top five distributed brand ads in outlets with ads are:

Brand	Distribution
du Maurier	16.1%
"Other" (<i>not specified</i>)	14.2%
Players	9.2%
Export A (<i>excluding Smooth</i>)	6.4%
Canadian Classics	6.0%

Sportsman ads were not found in any independent convenience outlets, with only 1.0% of the outlets carrying Rothmans and less than 1% of the outlets carrying Export A Smooth and the remaining Export A.

The following are regional highlights of tobacco brand ad distribution in independent convenience outlets (*Appendix Tables A-6 and A-9*):

- Ad distribution in independent convenience outlets topped the national average by almost 4% at 44.5%;
- There were no ads found in Saskatchewan;
- The lowest distribution was found in British Columbia and Manitoba, 25.3% and 20.9%, respectively;
- The highest distribution was found in Nova Scotia and New Brunswick, 65.0% and 58.7%, respectively;
- Quebec scored higher than the national distribution rate at 45.9% and Ontario scored lower at 38.6%;
- The brand with the highest ad distribution is du Maurier with 14.9% followed by "Other" at 14.5%; and
- Du Maurier had a high distribution in Windsor, Thunder Bay and St. Catharines, and the province with the highest distribution is Ontario.

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Brand Share of Ads – The brand with the greatest share of ads was similar to those whose ads had the highest distribution. Nationally, brand share of advertising in independent convenience outlets looked like this:

Brand	Share
"Other" (<i>not specified</i>)	14.4%
du Maurier	9.7%
Export A (<i>excluding Smooth</i>)	5.5%
Players	4.8%
Canadian Classics	4.4%

Average Number of Ads per Outlet – Independent convenience outlets averaged 3.3 ads per outlet, down from last year's 3.7 ads per outlet. Brands with highest distribution only averaged 1.4 ads per outlet, with the highest number of ads per outlet belonging to "Other".

Table 31 – Weighted – % Distribution and Number of Ads per Outlet by Brand by Type – National Results – Independent Convenience Outlets – 2005

Ad Availability Independent Convenience	Total		Counter-Top Displays		Danglers		Posters		Shelf-Talkers		Others	
	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg
Brand												
Total	33.6%	3.3	21.6%	2.2	11.8%	1.4	17.4%	2.3	16.4%	2.0	4.4%	2.3
Belvedere	5.2%	1.2	1.0%	1.2	1.9%	1.0	1.7%	1.2	2.5%	1.2	0.3%	1.0
Benson & Hedges	4.1%	1.3	2.0%	1.6	1.9%	1.0	3.5%	1.0	0.9%	1.1	0.2%	1.0
Canadian Classics	6.0%	1.9	1.1%	1.7	0.6%	1.2	0.7%	1.0	4.8%	1.8	0.4%	2.9
du Maurier	16.1%	1.4	7.8%	1.2	1.9%	1.2	5.7%	1.2	5.8%	1.2	1.7%	1.6
Export A	6.4%	1.4	2.7%	1.6	1.2%	1.1	5.8%	1.2	2.1%	1.1	0.5%	1.7
Export A Smooth	0.9%	1.5	0.6%	1.5	0.3%	1.3	1.0%	1.0	0.2%	2.8	0.1%	1.0
Remaining Export A	0.6%	1.3	0.2%	2.0	0.3%	1.2	0.6%	1.0	0.1%	2.3	0.1%	1.0
Matinee	2.7%	1.5	0.9%	2.0	0.8%	1.8	1.9%	1.0	1.4%	1.2	0.3%	1.0
Players	9.2%	1.3	3.4%	1.3	1.9%	1.0	3.1%	1.0	3.3%	1.3	0.4%	1.2
Rothmans	1.0%	1.2	0.1%	1.9	0.2%	1.0	1.4%	1.3	0.3%	1.0	0.1%	1.0
Sportsman	0.0%	1.0	0.0%	N/A	0.0%	N/A	0.0%	1.0	0.0%	N/A	0.0%	1.0
Other	14.2%	2.1	11.1%	1.8	3.4%	1.0	5.8%	1.9	3.2%	1.4	2.1%	1.8

Brand Advertising by Type of Ad – Danglers took the lead away from shelf-talkers this year with a share of 27.2% (*Table 32*). Posters are in second place, with a share of 22.7%. Rounding out the bottom of the list are shelf-talkers.

The leading promoted brands, du Maurier, Players, Export A, and Benson & Hedges rely most heavily on posters and danglers to promote themselves at POS.

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Table 32 – Weighted – % Share of Ads by Type and by Brand – National Results – Independent Convenience Outlets – 2005

Share of Ads - Independent Convenience						
Brand	All Ads	Counter-Top Displays	Danglers	Posters	Shelf-Talkers	Others
Total	100%	10.9%	27.2%	22.7%	6.9%	32.2%
Belvedere	100%	23.5%	24.2%	34.2%	3.2%	14.9%
Benson & Hedges	100%	19.4%	35.1%	10.5%	2.0%	33.0%
Canadian Classics	100%	5.1%	5.6%	64.9%	9.5%	14.8%
du Maurier	100%	7.7%	23.8%	24.9%	9.8%	33.8%
Export A	100%	8.2%	44.8%	15.1%	5.2%	26.6%
Export A Smooth	100%	15.7%	32.8%	20.5%	2.5%	28.5%
Remaining Export A	100%	20.4%	37.8%	11.6%	3.7%	26.5%
Matinee	100%	20.0%	27.1%	23.8%	4.8%	24.4%
Players	100%	13.6%	22.4%	29.8%	3.8%	30.4%
Rothmans	100%	9.8%	69.7%	10.2%	3.9%	6.4%
Sportsman	100%	0.0%	46.2%	0.0%	53.8%	0.0%
Other	100%	8.3%	26.5%	10.6%	8.7%	45.9%

The figures in *Table 33* on the next page summarize the leading advertised brands within each ad type. For each brand listed, we show the brand share of all such ads nationally, the percent (distribution) of all independent convenience outlets carrying at least one ad of that type, and the average number of such ads per outlet carrying.

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Table 33 – Weighted – POS Advertising: Tobacco Brands – Independent Convenience Outlets – All Cities – 2005

<i>Ad Type: Counter-Top Displays</i>	Brand Share of CT Displays	% Distribution	Ave. # Displays/Store
Other	41.1%	51.2%	1.8
du Maurier	20.3%	36.0%	1.2
Players	9.1%	15.5%	1.3
Export A	9.0%	12.4%	1.6
Benson & Hedges	7.0%	9.3%	1.6
Canadian Classics	4.1%	5.3%	1.7
Ad Type: Posters			
<i>Ad Type: Posters</i>	Brand Share of Posters	% Distribution	Ave. # Posters/Store
Other	28.1%	33.6%	1.9
Export A	18.0%	33.6%	1.2
du Maurier	17.0%	32.9%	1.2
Benson & Hedges	8.8%	20.2%	1.0
Players	8.0%	17.7%	1.0
Belvedere	5.2%	10.0%	1.2
Ad Type: Shelf-Talkers			
<i>Ad Type: Shelf-Talkers</i>	Brand Share of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
Canadian Classics	25.3%	29.0%	1.8
du Maurier	21.2%	35.2%	1.2
Other	13.5%	19.6%	1.4
Players	12.7%	20.0%	1.3
Belvedere	8.8%	15.5%	1.2
Export A	7.3%	13.1%	1.1
Ad Type: Danglers			
<i>Ad Type: Danglers</i>	Brand Share of Danglers	% Distribution	Ave. # Danglers/Store
Other	22.0%	28.7%	1.0
du Maurier	13.6%	16.1%	1.2
Belvedere	12.6%	16.4%	1.0
Benson & Hedges	12.1%	15.8%	1.0
Players	12.0%	16.2%	1.0
Matinee	8.8%	6.9%	1.8
Ad Type: Other Forms			
<i>Ad Type: Other Forms</i>	Brand Share of Other Ads	% Distribution	Ave. # Ads/Store
Other	36.3%	47.5%	1.8
du Maurier	27.4%	39.3%	1.6
Canadian Classics	12.1%	9.6%	2.9
Export A	8.2%	11.1%	1.7
Players	5.3%	10.2%	1.2
Matinee	3.4%	7.8%	1.0

Note: Summary tables of advertising trends in independent convenience stores by region and type of tobacco ad appear in the Appendix of this report.

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2.3 Gas Stores/Kiosks

Distribution – Down from 50% last year, 31.5% of all gas stores/kiosks carried ads from various tobacco brands. Counter-top displays had the highest average distribution of 21.4% (*Table 34*).

The top five brands with the highest distribution are:

Brand	Distribution
du Maurier	14.9%
"Other" (<i>not specified</i>)	14.5%
Export A (<i>excluding Smooth</i>)	8.3%
Players	8.0%
Benson & Hedges	5.5%

The tobacco brand with the greatest national distribution of ads is du Maurier at 16.1%, with "Others" following closely behind at 14.2%. Both Ontario and Quebec are well covered by du Maurier ads with 24.7% and 16.7% respectively.

With the exception of Saskatchewan, all cities were found to have tobacco brand advertising.

Brand Share of Ads – "Other" brands and du Maurier account for almost half of all the tobacco ads we found in gas stores/kiosks across the country. Although still rather concentrated behind relatively few tobacco brands, ad share is more concentrated this year than last, with the resurgence of du Maurier promotions in gas stores/kiosks.

Nationally, brand share of ads across gas stores/kiosks ranked as follows:

Brand	Share
"Other" (<i>not specified</i>)	14.4%
du Maurier	11.3%
Players	5.9%
Export A (<i>excluding Smooth</i>)	4.7%
Canadian Classics	4.2%

Average Number of Ads per Outlet – The most advertised tobacco brand (*du Maurier*) in gas stores/kiosks had 1.5 ad pieces in such outlets with ads (*Table 34*). The average outlet carried 3.2 pieces of tobacco POS advertising nationally. This figure is slightly lower than that of last year's survey (3.7) and suggests that, in gas stores/kiosks, the absolute number of tobacco POS ads is more dispersed between brands.

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Table 34 – Weighted – % Distribution and Number of Ads per Outlet by Type – National Results – Gas Stores/Kiosks – 2005

Ad Availability Gas Stores/Kiosks	Total		Counter-Top Displays		Danglers		Posters		Shelf-Talkers		Others	
	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg	Dist %	Avg
Total	31.5%	3.2	21.4%	2.2	8.7%	1.6	15.5%	2.1	17.7%	2.1	6.5%	2.3
Belvedere	5.2%	1.1	0.7%	1.1	2.4%	1.1	0.9%	1.2	2.6%	1.2	0.7%	1.0
Benson & Hedges	5.5%	1.3	1.6%	1.3	0.4%	1.3	2.4%	1.0	1.2%	1.5	0.7%	1.1
Canadian Classics	4.8%	1.5	3.3%	1.3	0.6%	2.0	1.5%	1.0	4.1%	1.2	0.2%	1.7
du Maurier	14.9%	1.5	9.8%	1.3	1.2%	1.3	5.4%	1.2	5.7%	1.4	3.5%	1.3
Export A	8.3%	1.6	2.5%	1.1	0.8%	2.7	3.0%	1.7	2.2%	1.3	0.9%	1.1
Export A Smooth	1.4%	2.3	0.3%	1.5	0.1%	2.6	0.4%	1.0	0.4%	2.7	0.1%	4.5
Remaining Export A	0.9%	1.9	0.2%	1.9	0.1%	1.5	0.3%	1.2	0.4%	1.7	0.1%	1.0
Matinee	3.4%	1.5	0.7%	1.8	1.1%	1.2	0.7%	1.0	1.0%	2.0	0.3%	1.0
Players	8.0%	1.4	4.5%	1.3	1.0%	1.0	2.6%	1.1	4.2%	1.3	1.5%	1.3
Rothmans	1.4%	1.3	0.3%	1.0	0.4%	1.6	0.5%	1.0	0.4%	1.1	0.0%	N/A
Sportsman	0.0%	3.0	0.0%	N/A	0.0%	N/A	0.0%	N/A	0.0%	3.0	0.0%	N/A
Other	14.5%	2.2	8.6%	1.9	2.6%	1.0	5.8%	2.0	4.5%	1.4	0.0238	2.1

Brand Advertising by Type of Ad – About 25% of all tobacco POS ads found at gas stores/kiosks across the country were in the form of posters (*Table 35*). This is almost double that of last year's (13.5%). Once the leader, shelf-talkers have decreased from 38.2% last year to only 10.1% this year.

Table 35 – Weighted – % Share of Ads by Type and by Brand – National Results – Gas Stores/Kiosks – 2005

Share of Ads - Gas Stores/Kiosks						
Brand	All Ads	Counter-Top Displays	Danglers	Posters	Shelf-Talkers	Others
Total	100%	9.5%	22.5%	25.2%	10.1%	32.7%
Belvedere	100%	31.1%	13.7%	37.5%	8.1%	9.7%
Benson & Hedges	100%	6.3%	32.5%	24.1%	9.8%	27.4%
Canadian Classics	100%	9.4%	13.1%	40.8%	2.4%	34.2%
du Maurier	100%	4.8%	18.7%	24.1%	13.3%	39.1%
Export A	100%	15.3%	36.9%	21.2%	6.8%	19.7%
Export A Smooth	100%	12.0%	13.0%	37.6%	18.4%	18.9%
Remaining Export A	100%	10.1%	19.6%	42.4%	4.3%	23.5%
Matinee	100%	21.9%	13.4%	35.6%	5.5%	23.6%
Players	100%	5.8%	16.7%	31.5%	11.4%	34.7%
Rothmans	100%	35.7%	24.2%	21.9%	0.0%	18.2%
Sportsman	100%	0.0%	0.0%	100.0%	0.0%	0.0%
Other	100%	6.3%	27.7%	15.1%	11.7%	39.1%

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Table 36 summarizes the leading advertised brands by type of tobacco POS promotion. For each brand, its share of each respective ad type is shown, along with the percentage (distribution) of gas stores/kiosks featuring at least one ad of that type, and the average number of such ads per outlet carrying.

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Table 36 – Weighted – POS Advertising: Tobacco Brands – Gas Stores/Kiosks – All Cities – 2005

<i>Ad Type: Counter-Top Displays</i>	Brand Share of CT Displays	% Distribution	Ave. # Displays/Store
Other	34.4%	40.1%	1.9
du Maurier	27.1%	45.6%	1.3
Players	12.5%	21.2%	1.3
Canadian Classics	8.9%	15.6%	1.3
Export A	5.7%	11.8%	1.1
Benson & Hedges	4.3%	7.2%	1.3
Ad Type: Posters			
<i>Ad Type: Posters</i>	Brand Share of Posters	% Distribution	Ave. # Posters/Store
Other	35.5%	37.3%	2.0
du Maurier	18.8%	34.8%	1.2
Export A	15.5%	19.5%	1.7
Players	8.7%	17.0%	1.1
Benson & Hedges	7.4%	15.7%	1.0
Canadian Classics	4.9%	10.0%	1.0
Ad Type: Shelf-Talkers			
<i>Ad Type: Shelf-Talkers</i>	Brand Share of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
du Maurier	21.7%	32.2%	1.4
Other	17.2%	25.7%	1.4
Players	14.7%	23.8%	1.3
Canadian Classics	13.8%	23.2%	1.2
Belvedere	8.3%	14.8%	1.2
Export A	8.0%	12.6%	1.3
Ad Type: Danglers			
<i>Ad Type: Danglers</i>	Brand Share of Danglers	% Distribution	Ave. # Danglers/Store
Other	19%	30%	1.0
Belvedere	18%	28%	1.1
Export A	15%	9%	2.7
du Maurier	11%	14%	1.3
Matinee	9%	12%	1.2
Canadian Classics	8%	7%	2.0
Ad Type: Other Forms			
<i>Ad Type: Other Forms</i>	Brand Share of Other Ads	% Distribution	Ave. # Ads/Store
Other	33.3%	36.5%	2.1
du Maurier	29.7%	54.2%	1.3
Players	13.3%	23.1%	1.3
Export A	6.4%	13.7%	1.1
Benson & Hedges	5.0%	10.2%	1.1
Belvedere	4.4%	10.1%	1.0

Note: Summary tables of advertising trends in gas stores/kiosks by region and type of tobacco ad appear in the Appendix of this report.

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Conclusion

The findings of the 2005 survey results are very encouraging. Retailer compliance with sales-to-minors provisions of the tobacco laws are similar this year to last, 80.8% in 2005 and 82.3% in 2004.

For the second year in a row, the national retailer compliance levels regarding youth access to tobacco exceeded the Federal Tobacco Control Strategy's (FTCS) 10-year target objective of 80% or greater compliance levels. The findings of the current survey point to the success of achieving and consolidating compliance gains across a large number of individual cities and towns to keep building compliance levels nationally.

Sales-to-minors compliance levels at or above 80% have been achieved and are proving sustainable in the great majority of cities and towns measured by our survey. The percentage of communities among those where compliance is within the highest range in 2005 is lower than last year (down to 18 from 20), but still very encouraging. Three cities that were on the lowest reported levels of compliance were on the top of the list this year: Saint John, St. John's and Saskatoon.

The results are also encouraging when it comes to sign compliance. At a rate of 64.7%, sign compliance has steadily improved over the last four years. Retailers surveyed for this study and found to be compliant, abided to every aspect of the law for posting signs in their outlets. The result this year shows an 8.2% jump compared to 2004.

The high national compliance figure this year for sales to minors is due largely in part by significant increases in compliance in five cities Saint John, Saskatoon, St. John's, Fredericton, and Halifax. The influence of these areas has been strong enough to maintain the national average, but in some cases is offset by lower scores in cities in some other regions. The obvious next step is to focus the available resources against the cities where compliance is relaxed or resistant.

Certainly, the national result is the outcome of the net gains and losses across many cities, not just those in the five cities mentioned, and we acknowledge that compliance levels rose this year in 19 of the 30 cities we visited.

We suggest that efforts towards rebuilding compliance levels in Moncton, Thunder Bay, Toronto, Winnipeg, Edmonton and Red Deer, where they suffered the strongest drops, and continue efforts in Quebec City, Montreal, Sherbrooke, Brandon and Campbell River/Courtenay, where compliance falls below 80%.

The corollary of this strategy is that we cannot let our guard down in those cities and regions where we are already satisfied with the results. The trend data clearly shows that compliance can plummet sharply between surveys when adequate levels of

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regulatory enforcement and reinforcement are not sustained. The latest survey encourages health authorities to pursue the efforts taken to promote awareness and compliance, and the lessons learned from the previous years' studies give us a good idea of where extra efforts must be directed to ensure the maximum positive impact on future national results. Additional resources and extra regulatory effort focused against our weakest markets could potentially help in raising low levels higher in those markets.

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Appendix

The Appendix contains additional supporting tables relating to tobacco point-of-sale advertising.

Tables A-1 – A-6: Weighted –Tobacco Point-of-Sale Advertising Indicators

Table A-1 – Weighted – Tobacco Point-of-Sales Advertising Indicators – 2005 – All Classes of Trade

Table A - 1 Region	Total		Danglers			Shelf-Talkers			Posters			Counter-Top Displays			Others		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	40.7%	3.3	22.4%	10.2%	1.5	36.8%	22.4%	2.0	35.9%	24.4%	2.3	48.1%	33.1%	2.3	14.1%	9.9%	2.3
ST. JOHN'S (NL)	45.7%	2.5	35.8%	18.1%	1.3	84.2%	75.7%	2.2	2.5%	1.0%	1.0	0.8%	0.6%	2.0	1.6%	4.5%	7.0
CHARLOTTETOWN (PEI)	59.4%	1.4	50.5%	43.4%	1.2	58.6%	54.2%	1.3	1.7%	2.4%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
NEW BRUNSWICK	45.6%	2.4	42.0%	22.8%	1.3	67.8%	53.2%	1.9	23.2%	14.1%	1.4	8.7%	5.1%	1.4	10.4%	4.7%	1.1
BATHURST	56.8%	1.8	18.7%	12.7%	1.2	7.5%	4.2%	1.0	77.6%	83.0%	1.9	0.0%	0.0%	0.0	0.0%	0.0%	0.0
FREDERICTON	36.8%	2.4	5.8%	3.7%	1.5	57.5%	46.9%	1.9	54.9%	28.4%	1.2	37.2%	21.0%	1.3	0.0%	0.0%	0.0
MONCTON	23.5%	1.3	71.3%	64.7%	1.2	37.1%	35.3%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SAINT JOHN	72.2%	2.9	52.6%	24.5%	1.3	95.6%	64.9%	1.9	5.6%	2.0%	1.0	1.4%	1.0%	2.0	20.6%	7.7%	1.1
NOVA SCOTIA	59.9%	1.8	33.3%	22.8%	1.2	37.1%	29.0%	1.4	22.3%	16.7%	1.3	16.7%	26.2%	2.8	9.0%	5.3%	1.0
HALIFAX	54.3%	1.8	30.8%	20.6%	1.2	42.3%	34.1%	1.5	4.3%	2.4%	1.0	27.5%	42.2%	2.8	0.7%	0.7%	2.0
SYDNEY	71.4%	1.7	37.1%	26.5%	1.2	29.0%	20.6%	1.2	50.3%	40.2%	1.4	0.0%	0.0%	0.0	21.9%	12.8%	1.0
QUEBEC	48.4%	3.8	12.6%	4.6%	1.4	11.2%	3.1%	1.1	64.9%	47.0%	2.8	65.1%	35.7%	2.1	14.7%	9.6%	2.5
CHICOUTIMI	83.8%	4.9	5.5%	1.4%	1.3	0.0%	0.0%	0.0	97.4%	47.8%	2.4	97.1%	50.8%	2.6	0.0%	0.0%	0.0
JONQUIERE	43.6%	2.7	17.9%	8.9%	1.3	14.1%	5.4%	1.0	58.0%	37.4%	1.7	67.0%	34.0%	1.4	18.8%	14.3%	2.1
MONTREAL	59.6%	7.3	1.4%	0.8%	4.3	8.4%	1.4%	1.2	80.3%	58.3%	5.3	43.6%	32.5%	5.4	10.0%	7.0%	5.1
QUEBEC CITY	59.6%	7.3	1.4%	0.8%	4.3	8.4%	1.4%	1.2	80.3%	58.3%	5.3	43.6%	32.5%	5.4	10.0%	7.0%	5.1
SHERBROOKE	48.2%	2.0	1.4%	0.7%	1.0	0.0%	0.0%	0.0	34.7%	31.3%	1.8	92.5%	67.9%	1.5	0.0%	0.0%	0.0
ONTARIO	39.7%	2.9	32.7%	15.6%	1.4	34.8%	19.2%	1.6	34.5%	18.1%	1.5	48.1%	26.5%	1.6	26.7%	20.6%	2.3
KINGSTON	40.1%	2.5	0.0%	0.0%	0.0	19.3%	26.3%	3.3	85.1%	53.0%	1.5	0.0%	0.0%	0.0	11.2%	20.7%	4.5
OTTAWA	52.4%	3.1	27.2%	15.4%	1.8	25.0%	19.4%	2.4	31.1%	21.8%	2.2	23.4%	11.8%	1.6	52.5%	31.5%	1.9
ST. CATHARINES	7.8%	1.6	19.7%	14.9%	1.2	7.1%	4.5%	1.0	0.0%	0.0%	0.0	77.3%	67.3%	1.4	7.1%	13.4%	3.0
SUDBURY	54.3%	3.0	10.3%	3.5%	1.0	34.4%	16.3%	1.4	1.7%	0.6%	1.0	84.5%	77.4%	2.7	3.4%	2.3%	2.0
THUNDER BAY	51.8%	1.8	3.6%	2.0%	1.0	0.0%	0.0%	0.0	5.5%	5.3%	1.7	94.5%	92.7%	1.7	0.0%	0.0%	0.0
TORONTO	40.3%	3.0	43.0%	19.5%	1.4	41.5%	18.1%	1.3	41.2%	19.4%	1.4	52.4%	26.3%	1.5	19.7%	16.6%	2.5
WINDSOR	34.6%	3.7	2.2%	1.2%	2.0	41.7%	37.2%	3.3	3.3%	1.5%	1.7	31.5%	10.5%	1.2	80.0%	49.6%	2.3
MANITOBA	26.6%	8.5	28.7%	17.8%	5.3	36.2%	34.0%	8.0	25.1%	4.1%	1.4	62.2%	43.4%	5.9	1.5%	0.7%	4.0
BRANDON	90.7%	25.4	79.5%	19.8%	6.3	98.0%	38.4%	9.9	9.0%	1.2%	3.5	80.0%	40.5%	12.9	0.0%	0.0%	0.0
WINNIPEG	20.7%	1.7	8.2%	5.5%	1.1	11.3%	7.4%	1.1	31.6%	21.3%	1.1	55.1%	60.8%	1.8	2.1%	4.9%	4.0
SASKATCHEWAN	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
REGINA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SASKATOON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
ALBERTA	48.6%	3.2	8.2%	3.1%	1.2	53.1%	30.9%	1.9	20.7%	10.8%	1.7	66.9%	49.9%	2.4	8.0%	5.3%	2.2
CALGARY	59.6%	3.3	8.7%	3.0%	1.1	60.9%	32.7%	1.8	16.9%	8.6%	1.7	68.1%	53.0%	2.6	3.1%	2.7%	2.9
EDMONTON	34.8%	2.7	7.0%	3.9%	1.5	24.1%	12.2%	1.4	36.1%	22.5%	1.7	63.6%	46.9%	2.0	19.5%	14.4%	2.0
MEDICINE HAT	16.0%	1.1	26.9%	33.1%	1.3	73.1%	66.9%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
RED DEER	95.3%	4.9	5.1%	1.0%	1.0	92.1%	54.3%	2.9	0.0%	0.0%	0.0	82.0%	43.9%	2.6	3.8%	0.8%	1.0
BRITISH COLUMBIA	21.7%	3.4	14.1%	7.0%	1.7	39.5%	34.0%	2.9	12.5%	6.0%	1.6	44.6%	43.7%	3.3	14.8%	9.3%	2.1
KELOWNA	29.4%	3.9	0.0%	0.0%	0.0	47.7%	48.1%	3.9	11.3%	8.6%	2.9	65.2%	43.3%	2.6	0.0%	0.0%	0.0
CAMPBELL RIVER	30.0%	2.2	0.0%	0.0%	0.0	73.6%	72.4%	2.2	0.0%	0.0%	0.0	17.9%	8.1%	1.0	38.8%	19.6%	1.1
COURTENAY	30.0%	2.2	0.0%	0.0%	0.0	73.6%	72.4%	2.2	0.0%	0.0%	0.0	17.9%	8.1%	1.0	38.8%	19.6%	1.1
VANCOUVER CMA	20.3%	3.5	17.6%	8.5%	1.7	34.2%	28.8%	2.9	14.3%	6.1%	1.5	45.3%	46.7%	3.6	13.7%	9.8%	2.5
VANCOUVER 1	19.2%	2.6	0.0%	0.0%	0.0	65.9%	50.9%	2.0	1.8%	0.7%	1.0	35.7%	33.4%	2.4	21.3%	15.0%	1.8
VANCOUVER 2	12.4%	1.8	20.2%	17.0%	1.6	15.1%	8.2%	1.0	54.0%	50.7%	1.7	21.0%	16.3%	1.4	14.4%	7.8%	1.0
VANCOUVER 3	26.8%	4.2	35.5%	15.0%	1.8	24.5%	30.2%	5.1	8.2%	2.0%	1.0	55.0%	41.5%	3.2	8.3%	11.4%	5.8
VANCOUVER 4	25.3%	5.4	8.6%	1.6%	1.0	8.6%	10.2%	6.3	13.8%	3.3%	1.3	69.1%	83.1%	6.4	10.0%	1.9%	1.0

Dist % = Percent of stores (based on weighted estimates) that carried that form of ad
 Avg = Average number of ads in distribution in all stores carrying that type of ad
 % = Weighted share of total ads, i.e. the percent of all ads represented by each type of ad

Vancouver 1: Vancouver, Richmond
 Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster
 Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
 Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-2 – Weighted – Tobacco Point-of-Sale Advertising Indicators – 2005 – Chain Convenience

Region	Total			Danglers			Shelf-Talkers			Posters			Counter-Top Displays			Others		
	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%
NATIONAL	64.3%	3.6	24.9%	10.2%	1.5	31.8%	15.3%	1.7	38.8%	27.2%	2.5	51.0%	32.6%	2.3	23.0%	14.7%	2.3	
ST. JOHN'S (NL)	81.3%	1.8	53.8%	33.3%	1.1	76.9%	66.7%	1.6	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0%	0.0
CHARLOTTETOWN (PEI)	66.7%	1.5	62.5%	50.0%	1.2	50.0%	50.0%	1.5	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0%	0.0
NEW BRUNSWICK	53.2%	2.7	61.7%	35.1%	1.5	72.2%	43.8%	1.7	31.6%	11.6%	1.0	12.5%	4.6%	1.0	13.4%	4.9%	1.0	
BATHURST	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FREDERICTON	50.0%	2.5	0.0%	0.0%	0.0	100.0%	40.0%	1.0	100.0%	40.0%	1.0	50.0%	20.0%	1.0	0.0%	0.0%	0.0%	0.0
MONCTON	33.3%	1.5	100.0%	83.3%	1.3	25.0%	16.7%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0%	0.0
SAINT JOHN	87.5%	3.6	71.4%	36.0%	1.8	85.7%	52.0%	2.2	14.3%	4.0%	1.0	0.0%	0.0%	0.0	28.6%	8.0%	1.0	
NOVA SCOTIA	77.5%	1.6	16.7%	14.8%	1.4	37.4%	26.0%	1.1	21.0%	18.4%	1.4	24.9%	33.7%	2.2	11.2%	7.0%	1.0	
HALIFAX	69.6%	1.6	12.5%	12.0%	1.5	43.8%	32.0%	1.1	6.3%	4.0%	1.0	37.5%	52.0%	2.2	0.0%	0.0%	0.0%	0.0
SYDNEY	100.0%	1.7	25.0%	20.0%	1.3	25.0%	15.0%	1.0	50.0%	45.0%	1.5	0.0%	0.0%	0.0	33.3%	20.0%	1.0	
QUEBEC	83.2%	4.5	15.1%	4.3%	1.3	16.1%	4.2%	1.2	62.0%	44.4%	3.2	63.5%	30.4%	2.1	30.2%	16.6%	2.5	
CHICOUTIMI																		
JONQUIERE	91.7%	6.5	9.1%	1.4%	1.0	0.0%	0.0%	0.0	100.0%	47.2%	3.1	100.0%	51.4%	3.4	0.0%	0.0%	0.0%	0.0
MONTREAL	86.5%	3.4	19.3%	7.3%	1.3	21.7%	7.0%	1.1	51.8%	30.4%	2.0	61.4%	29.0%	1.6	37.3%	26.2%	2.4	
QUEBEC CITY	70.7%	7.9	2.4%	0.3%	1.0	2.4%	0.9%	3.0	85.4%	65.5%	6.1	56.1%	27.4%	3.9	17.1%	5.8%	2.7	
SHERBROOKE	88.2%	3.3	6.7%	2.0%	1.0	0.0%	0.0%	0.0	86.7%	56.0%	2.2	93.3%	42.0%	1.5	0.0%	0.0%	0.0%	0.0
ONTARIO	54.0%	3.4	36.2%	18.4%	1.7	31.8%	16.8%	1.8	35.9%	15.9%	1.5	41.9%	28.4%	2.3	31.8%	20.5%	2.2	
KINGSTON	56.3%	1.8	0.0%	0.0%	0.0	11.1%	12.5%	2.0	88.9%	87.5%	1.8	0.0%	0.0%	0.0	0.0%	0.0%	0.0%	0.0
OTTAWA	65.5%	3.3	47.2%	34.7%	2.4	25.0%	21.2%	2.8	30.6%	16.1%	1.7	13.9%	4.2%	1.0	47.2%	23.7%	1.6	
ST. CATHARINES	13.2%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	100.0%	1.3	0.0%	0.0%	0.0%	0.0
SUDBURY	64.7%	4.1	0.0%	0.0%	0.0	72.7%	33.3%	1.9	0.0%	0.0%	0.0	72.7%	66.7%	3.8	0.0%	0.0%	0.0%	0.0
THUNDER BAY	66.7%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	8.3%	12.5%	3.0	91.7%	87.5%	1.9	0.0%	0.0%	0.0%	0.0
TORONTO	58.8%	3.7	48.3%	20.0%	1.5	35.0%	12.3%	1.3	46.7%	18.2%	1.4	48.3%	33.2%	2.5	25.0%	16.4%	2.4	
WINDSOR	72.2%	4.0	0.0%	0.0%	0.0	43.6%	34.8%	3.2	2.6%	0.6%	1.0	15.4%	5.8%	1.5	94.9%	58.7%	2.5	
MANITOBA	51.1%	2.0	15.8%	12.1%	1.6	11.7%	15.4%	2.7	27.4%	13.4%	1.0	54.1%	59.1%	2.2	0.0%	0.0%	0.0%	0.0
BRANDON	100.0%	4.0	50.0%	25.0%	2.0	75.0%	56.3%	3.0	0.0%	0.0%	0.0	25.0%	18.8%	3.0	0.0%	0.0%	0.0%	0.0
WINNIPEG	48.1%	1.8	11.5%	8.5%	1.3	3.8%	4.3%	2.0	30.8%	17.0%	1.0	57.7%	70.2%	2.2	0.0%	0.0%	0.0%	0.0
SASKATCHEWAN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
REGINA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SASKATOON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ALBERTA	79.2%	3.5	15.9%	5.1%	1.1	49.5%	27.9%	2.0	14.8%	8.2%	1.9	73.2%	52.2%	2.5	9.1%	6.7%	2.6	
CALGARY	95.5%	3.6	21.2%	6.1%	1.1	56.5%	31.6%	2.0	16.5%	8.4%	1.9	67.1%	49.0%	2.7	4.7%	4.8%	3.8	
EDMONTON	57.9%	3.1	4.5%	3.0%	2.0	29.5%	13.3%	1.4	13.6%	9.6%	2.2	88.6%	60.7%	2.1	20.5%	13.3%	2.0	
MEDICINE HAT	40.0%	1.0	50.0%	50.0%	1.0	50.0%	50.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0%	0.0
RED DEER	100.0%	5.8	0.0%	0.0%	0.0	83.3%	45.7%	3.2	0.0%	0.0%	0.0	83.3%	54.3%	3.8	0.0%	0.0%	0.0%	0.0
BRITISH COLUMBIA	34.8%	3.7	7.9%	3.6%	1.7	39.2%	35.8%	3.4	21.3%	12.1%	2.1	43.5%	43.0%	3.6	12.4%	5.6%	1.7	
KELOWNA	44.4%	2.5	0.0%	0.0%	0.0	50.0%	20.0%	1.0	25.0%	50.0%	5.0	50.0%	30.0%	1.5	0.0%	0.0%	0.0%	0.0
CAMPBELL RIVER																		
COURTENAY	50.0%	2.0	0.0%	0.0%	0.0	75.0%	75.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	50.0%	25.0%	1.0	
VANCOUVER CMA	32.6%	4.1	10.0%	4.1%	1.7	32.9%	34.1%	4.2	24.0%	10.3%	1.7	49.0%	46.9%	3.9	8.4%	4.6%	2.2	
VANCOUVER 1	31.8%	2.7	0.0%	0.0%	0.0	64.3%	50.0%	2.1	14.3%	5.3%	1.0	28.6%	28.9%	2.8	14.3%	15.8%	3.0	
VANCOUVER 2	14.3%	3.0	25.0%	16.7%	2.0	0.0%	0.0%	0.0	75.0%	58.3%	2.3	50.0%	16.7%	1.0	25.0%	8.3%	1.0	
VANCOUVER 3	41.7%	6.6	20.0%	4.5%	1.5	30.0%	40.9%	9.0	0.0%	0.0%	0.0	70.0%	54.5%	5.1	0.0%	0.0%	0.0%	0.0
VANCOUVER 4	80.0%	2.8	0.0%	0.0%	0.0	0.0%	0.0%	0.0	50.0%	27.3%	1.5	50.0%	72.7%	4.0	0.0%	0.0%	0.0%	0.0

N/A = Not Applicable, this class of trade is not represented in this region or tobacco advertisement are banned.

Dist % = Percent of stores (based on weighted estimates) that carried that form of ad

Avg = Average number of ads in distribution in all stores carrying that type of ad

% = Weighted share of total ads, i.e. the percent of all ads represented by each type of ad

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-3 – Weighted – Tobacco Point-of-Sale Advertising Indicators – 2005 Pharmacies

Region	Total		Danglers			Shelf-Talkers			Posters			Counter-Top Displays			Others		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	11.7%	4.6	17.3%	12.8%	3.4	63.0%	36.8%	2.7	11.1%	4.4%	1.8	44.2%	37.6%	3.9	14.3%	8.4%	2.7
ST. JOHN'S (NL)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
CHARLOTTETOWN (PEI)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
NEW BRUNSWICK	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
BATHURST	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FREDERICTON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
MONCTON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SAINT JOHN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
NOVA SCOTIA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
HALIFAX	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SYDNEY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
QUEBEC	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
CHICOUTIMI	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
JONQUIERE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
MONTREAL	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
QUEBEC CITY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SHERBROOKE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ONTARIO	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
KINGSTON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
OTTAWA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ST. CATHARINES	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SUDBURY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
THUNDER BAY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
TORONTO	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
WINDSOR	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
MANITOBA	6.8%	26.0	100.0%	23.1%	6.0	100.0%	30.8%	8.0	0.0%	0.0%	0.0	100.0%	46.2%	12.0	0.0%	0.0%	0.0
BRANDON	100.0%	26.0	100.0%	23.1%	6.0	100.0%	30.8%	8.0	0.0%	0.0%	0.0	100.0%	46.2%	12.0	0.0%	0.0%	0.0
WINNIPEG	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SASKATCHEWAN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
REGINA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SASKATOON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ALBERTA	23.3%	2.7	9.9%	3.6%	1.0	63.7%	43.8%	1.9	13.4%	8.6%	1.8	49.3%	37.9%	2.1	13.1%	6.0%	1.3
CALGARY	27.5%	3.0	14.3%	4.8%	1.0	78.6%	45.2%	1.7	7.1%	4.8%	2.0	57.1%	45.2%	2.4	0.0%	0.0%	0.0
EDMONTON	12.7%	2.0	0.0%	0.0%	0.0	12.5%	6.3%	1.0	37.5%	31.3%	1.7	37.5%	31.3%	1.7	50.0%	31.3%	1.3
MEDICINE HAT	23.1%	1.0	0.0%	0.0%	0.0	100.0%	100.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
RED DEER	100.0%	3.4	14.3%	4.2%	1.0	85.7%	66.7%	2.7	0.0%	0.0%	0.0	57.1%	29.2%	1.8	0.0%	0.0%	0.0
BRITISH COLUMBIA	9.4%	2.4	10.2%	4.3%	1.0	48.3%	36.2%	1.8	8.4%	7.0%	2.0	10.2%	4.3%	1.0	22.9%	48.2%	5.0
KELOWNA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
CAMPBELL RIVER	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
COURTENAY	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER CMA	10.6%	2.4	10.2%	4.3%	1.0	48.3%	36.2%	1.8	8.4%	7.0%	2.0	10.2%	4.3%	1.0	22.9%	48.2%	5.0
VANCOUVER 1	12.1%	1.8	0.0%	0.0%	0.0	75.0%	85.7%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	25.0%	14.3%	1.0
VANCOUVER 2	4.2%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	100.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER 3	16.7%	3.3	25.0%	7.7%	1.0	25.0%	7.7%	1.0	0.0%	0.0%	0.0	25.0%	7.7%	1.0	25.0%	76.9%	10.0
VANCOUVER 4	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0

N/A = Not Applicable, this class of trade is not represented in this region or tobacco advertisements are banned.

Dist % = Percent of stores (based on weighted estimates) that carried that form of ad

Avg = Average number of ads in distribution in all stores carrying that type of ad

% = Weighted share of total ads, i.e. the percent of all ads represented by each type of ad

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-4 – Weighted – Tobacco Point-of-Sale Advertising Indicators – 2005 – Gas Stores/Kiosks

Region	Total			Danglers			Shelf-Talkers			Posters			Counter-Top Displays			Others			
	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%	Dist %	Avg	%	
NATIONAL	46.4%	3.2	18.9%	9.5%	1.6	38.2%	25.2%	2.1	33.4%	22.5%	2.1	46.2%	32.7%	2.2	14.1%	10.1%	2.3		
ST. JOHN'S (NL)	61.9%	2.2	34.6%	21.1%	1.3	84.6%	77.2%	2.0	3.8%	1.8%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
CHARLOTTETOWN (PEI)	64.7%	1.3	45.5%	44.8%	1.3	59.1%	55.2%	1.2	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
NEW BRUNSWICK	40.7%	2.2	41.0%	23.2%	1.2	60.5%	50.6%	1.8	28.7%	21.0%	1.6	2.7%	2.5%	2.0	5.9%	2.7%	1.0		
BATHURST	80.0%	1.8	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	100.0%	1.8	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
FREDERICTON	34.8%	2.1	0.0%	0.0%	0.0	75.0%	64.7%	1.8	37.5%	23.5%	1.3	12.5%	11.8%	2.0	0.0%	0.0%	0.0		
MONCTON	19.0%	1.3	75.0%	80.0%	1.3	25.0%	20.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
SAINT JOHN	74.1%	2.9	65.0%	26.3%	1.2	100.0%	66.7%	1.9	5.0%	1.8%	1.0	0.0%	0.0%	0.0	15.0%	5.3%	1.0		
NOVA SCOTIA	60.0%	1.7	29.8%	20.1%	1.2	34.8%	28.7%	1.4	28.8%	21.6%	1.3	14.8%	22.8%	2.7	11.9%	6.9%	1.0		
HALIFAX	57.8%	1.8	37.8%	24.2%	1.1	45.9%	37.9%	1.5	2.7%	1.5%	1.0	24.3%	36.4%	2.7	0.0%	0.0%	0.0		
SYDNEY	63.9%	1.7	17.4%	13.2%	1.3	17.4%	13.2%	1.3	69.6%	55.3%	1.3	0.0%	0.0%	0.0	30.4%	18.4%	1.0		
QUEBEC	45.9%	3.9	6.6%	4.6%	2.7	3.2%	0.8%	1.0	65.7%	48.6%	2.9	59.0%	36.0%	2.4	15.8%	10.0%	2.5		
CHICOUTIMI																			
JONQUIERE	90.6%	4.2	3.4%	0.8%	1.0	0.0%	0.0%	0.0	96.6%	48.0%	2.1	96.6%	51.2%	2.3	0.0%	0.0%	0.0		
MONTREAL	40.0%	2.5	10.0%	11.0%	2.8	5.0%	2.0%	1.0	57.5%	37.0%	1.6	55.0%	32.0%	1.5	22.5%	18.0%	2.0		
QUEBEC CITY	60.0%	7.6	0.0%	0.0%	0.0	0.0%	0.0%	0.0	83.3%	59.7%	5.5	52.1%	34.9%	5.1	6.3%	5.4%	6.7		
SHERBROOKE	37.9%	1.6	0.0%	0.0%	0.0	0.0%	0.0%	0.0	9.1%	5.6%	1.0	90.9%	94.4%	1.7	0.0%	0.0%	0.0		
ONTARIO	44.3%	2.8	26.2%	10.9%	1.2	38.0%	22.2%	1.6	33.3%	18.0%	1.5	50.7%	24.0%	1.3	27.8%	24.9%	2.5		
KINGSTON	33.3%	4.3	0.0%	0.0%	0.0	28.6%	36.7%	5.5	85.7%	26.7%	1.3	0.0%	0.0%	0.0	28.6%	36.7%	5.5		
OTTAWA	58.0%	3.1	12.5%	4.0%	1.0	25.0%	20.8%	2.6	32.5%	22.4%	2.2	27.5%	12.8%	1.5	60.0%	40.0%	2.1		
ST. CATHARINES	5.4%	2.0	33.3%	16.7%	1.0	33.3%	16.7%	1.0	0.0%	0.0%	0.0	33.3%	16.7%	1.0	33.3%	50.0%	3.0		
SUDBURY	54.3%	2.8	10.5%	3.8%	1.0	31.6%	11.3%	1.0	5.3%	1.9%	1.0	84.2%	79.2%	2.6	5.3%	3.8%	2.0		
THUNDER BAY	50.0%	1.7	7.7%	4.5%	1.0	0.0%	0.0%	0.0	7.7%	4.5%	1.0	92.3%	90.9%	1.7	0.0%	0.0%	0.0		
TORONTO	47.1%	2.6	35.4%	15.7%	1.2	45.8%	22.8%	1.3	37.5%	18.9%	1.3	54.2%	22.8%	1.1	18.8%	19.7%	2.8		
WINDSOR	26.2%	3.5	0.0%	0.0%	0.0	45.5%	36.8%	2.8	0.0%	0.0%	0.0	63.6%	21.1%	1.1	72.7%	42.1%	2.0		
MANITOBA	47.8%	6.5	21.3%	18.0%	5.5	32.3%	36.8%	7.4	28.0%	6.1%	1.4	57.8%	37.5%	4.2	2.6%	1.6%	4.0		
BRANDON	100.0%	24.3	73.7%	21.0%	6.9	100.0%	43.2%	10.5	21.1%	3.0%	3.5	73.7%	32.8%	10.8	0.0%	0.0%	0.0		
WINNIPEG	41.7%	1.5	6.7%	4.3%	1.0	13.3%	8.7%	1.0	30.0%	19.6%	1.0	53.3%	58.7%	1.7	3.3%	8.7%	4.0		
SASKATCHEWAN	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
REGINA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
SASKATOON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
ALBERTA	62.6%	3.1	4.9%	2.0%	1.2	51.5%	30.2%	1.8	28.3%	14.0%	1.5	67.7%	50.1%	2.3	6.2%	3.8%	1.9		
CALGARY	72.0%	3.2	3.7%	1.2%	1.0	61.1%	31.2%	1.6	24.1%	11.0%	1.5	68.5%	53.8%	2.5	3.7%	2.9%	2.5		
EDMONTON	52.6%	2.4	7.3%	4.1%	1.3	22.0%	12.4%	1.3	43.9%	29.9%	1.6	61.0%	46.4%	1.8	9.8%	7.2%	1.8		
MEDICINE HAT	16.7%	1.3	25.0%	40.0%	2.0	75.0%	60.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0		
RED DEER	100.0%	5.8	0.0%	0.0%	0.0	100.0%	53.1%	3.1	0.0%	0.0%	0.0	100.0%	45.3%	2.6	9.1%	1.6%	1.0		
BRITISH COLUMBIA	33.0%	3.5	15.5%	7.5%	1.7	36.9%	34.0%	3.2	9.3%	3.8%	1.4	51.4%	47.1%	3.2	17.6%	7.7%	1.5		
KELOWNA	59.1%	3.7	0.0%	0.0%	0.0	42.3%	46.4%	4.1	11.5%	7.2%	2.3	65.4%	46.4%	2.6	0.0%	0.0%	0.0		
CAMPBELL RIVER																			
COURTENAY	40.9%	2.2	0.0%	0.0%	0.0	66.7%	70.0%	2.3	0.0%	0.0%	0.0	11.1%	5.0%	1.0	44.4%	25.0%	1.3		
VANCOUVER CMA	29.4%	3.6	20.8%	9.8%	1.7	32.1%	28.4%	3.2	9.9%	3.2%	1.2	53.2%	50.5%	3.4	18.3%	8.2%	1.6		
VANCOUVER 1	36.5%	3.1	0.0%	0.0%	0.0	57.9%	43.1%	2.3	0.0%	0.0%	0.0	47.4%	39.7%	2.6	26.3%	17.2%	2.0		
VANCOUVER 2	11.9%	1.4	28.6%	20.0%	1.0	14.3%	10.0%	1.0	14.3%	20.0%	2.0	14.3%	30.0%	3.0	28.6%	20.0%	1.0		
VANCOUVER 3	40.6%	4.2	38.5%	16.7%	1.8	23.1%	28.7%	5.2	15.4%	3.7%	1.0	61.5%	48.1%	3.3	7.7%	2.8%	1.5		
VANCOUVER 4	23.3%	5.4	0.0%	0.0%	0.0	0.0%	0.0%	0.0	14.3%	2.6%	1.0	85.7%	92.1%	5.8	28.6%	5.3%	1.0		

Dist % = Percent of stores (based on weighted estimates) that carried that form of ad

Avg = Average number of ads in distribution in all stores carrying that type of ad

% = Weighted share of total ads, i.e. the percent of all ads represented by each type of ad

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-5 – Weighted – Tobacco Point-of-Sale Advertising Indicators – 2005 –Grocery

Table A - 5 Region	Total		Danglers			Shelf-Talkers			Posters			Counter-Top Displays			Others		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	12.5%	2.4	7.3%	3.5%	1.2	24.0%	15.8%	1.6	34.5%	22.0%	1.5	51.7%	50.1%	2.3	7.4%	8.7%	2.8
ST. JOHN'S (NL)	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
CHARLOTTETOWN (PEI)	27.3%	1.3	33.3%	25.0%	1.0	33.3%	25.0%	1.0	33.3%	50.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
NEW BRUNSWICK	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
BATHURST	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
FREDERICTON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
MONCTON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SAINT JOHN	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
NOVA SCOTIA	12.8%	2.6	40.4%	31.1%	2.0	0.0%	0.0%	0.0	59.6%	57.4%	2.5	0.0%	0.0%	0.0	29.8%	11.5%	1.0
HALIFAX	8.3%	2.0	100.0%	100.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SYDNEY	20.0%	3.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	83.3%	2.5	0.0%	0.0%	0.0	50.0%	16.7%	1.0
QUEBEC	19.8%	2.2	3.1%	1.4%	1.0	0.0%	0.0%	0.0	73.6%	48.8%	1.4	34.0%	34.8%	2.2	11.6%	15.0%	2.8
CHICOUTIMI	44.4%	4.5	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	52.8%	2.4	87.5%	47.2%	2.4	0.0%	0.0%	0.0
JONQUIERE	12.2%	1.5	9.1%	6.3%	1.0	0.0%	0.0%	0.0	36.4%	31.3%	1.3	36.4%	25.0%	1.0	27.3%	37.5%	2.0
MONTREAL	30.9%	1.9	0.0%	0.0%	0.0	0.0%	0.0%	0.0	90.5%	55.0%	1.2	14.3%	30.0%	4.0	4.8%	15.0%	6.0
QUEBEC CITY	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SHERBROOKE	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
ONTARIO	5.6%	1.6	21.0%	12.8%	1.0	23.6%	18.0%	1.2	0.0%	0.0%	0.0	62.6%	69.2%	1.8	0.0%	0.0%	0.0
KINGSTON	12.5%	2.0	0.0%	0.0%	0.0	100.0%	100.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
OTTAWA	2.2%	3.0	0.0%	0.0%	0.0	100.0%	33.3%	1.0	0.0%	0.0%	0.0	100.0%	66.7%	2.0	0.0%	0.0%	0.0
ST. CATHARINES	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SUDBURY	41.2%	2.1	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	100.0%	2.1	0.0%	0.0%	0.0
THUNDER BAY	50.0%	1.5	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	100.0%	1.5	0.0%	0.0%	0.0
TORONTO	3.8%	1.0	50.0%	50.0%	1.0	25.0%	25.0%	1.0	0.0%	0.0%	0.0	25.0%	25.0%	1.0	0.0%	0.0%	0.0
WINDSOR	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
MANITOBA	5.3%	1.7	0.0%	0.0%	0.0	0.0%	0.0%	0.0	33.3%	60.0%	3.0	66.7%	40.0%	1.0	0.0%	0.0%	0.0
BRANDON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
WINNIPEG	5.8%	1.7	0.0%	0.0%	0.0	0.0%	0.0%	0.0	33.3%	60.0%	3.0	66.7%	40.0%	1.0	0.0%	0.0%	0.0
SASKATCHEWAN	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
REGINA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SASKATOON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
ALBERTA	32.6%	3.0	3.0%	1.0%	1.0	50.6%	28.4%	1.7	3.7%	1.8%	1.5	78.8%	62.6%	2.4	3.7%	6.1%	5.0
CALGARY	46.7%	2.6	0.0%	0.0%	0.0	52.4%	31.5%	1.5	0.0%	0.0%	0.0	81.0%	68.5%	2.2	0.0%	0.0%	0.0
EDMONTON	16.2%	4.5	9.1%	2.0%	1.0	36.4%	18.4%	2.3	18.2%	6.1%	1.5	81.8%	53.1%	2.9	18.2%	20.4%	5.0
MEDICINE HAT	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
RED DEER	71.4%	4.2	20.0%	4.8%	1.0	80.0%	42.9%	2.3	0.0%	0.0%	0.0	40.0%	52.4%	5.5	0.0%	0.0%	0.0
BRITISH COLUMBIA	4.4%	2.7	0.0%	0.0%	0.0	41.5%	20.1%	1.3	13.9%	5.0%	1.0	30.3%	69.6%	6.3	14.3%	5.2%	1.0
KELOWNA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
CAMPBELL RIVER	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
COURTENAY	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER CMA	5.4%	2.7	0.0%	0.0%	0.0	41.5%	20.1%	1.3	13.9%	5.0%	1.0	30.3%	69.6%	6.3	14.3%	5.2%	1.0
VANCOUVER 1	2.7%	3.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	100.0%	3.0	0.0%	0.0%	0.0
VANCOUVER 2	8.8%	1.0	0.0%	0.0%	0.0	66.7%	66.7%	1.0	33.3%	33.3%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER 3	2.4%	2.0	0.0%	0.0%	0.0	100.0%	100.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER 4	12.5%	5.5	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	50.0%	90.9%	10.0	50.0%	9.1%	1.0

Dist % = Percent of stores (based on weighted estimates) that carried that form of ad
 Avg = Average number of ads in distribution in all stores carrying that type of ad
 % = Weighted share of total ads, i.e. the percent of all ads represented by each type of ad

Vancouver 1: Vancouver, Richmond
 Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster
 Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
 Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-6 – Weighted – Tobacco Point-of-Sale Advertising Indicators – 2005 – Independent Convenience

Region	Total		Danglers			Shelf-Talkers			Posters			Counter-Top Displays			Others		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	44.5%	3.3	26.4%	10.9%	1.4	36.9%	22.7%	2.0	39.0%	27.2%	2.3	48.6%	32.2%	2.2	9.9%	6.9%	2.3
ST. JOHN'S (NL)	59.8%	2.9	32.7%	13.6%	1.2	85.5%	75.9%	2.6	1.8%	0.6%	1.0	1.8%	1.2%	2.0	3.6%	8.6%	7.0
CHARLOTTETOWN (PEI)	60.6%	1.5	55.0%	41.4%	1.1	65.0%	58.6%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
NEW BRUNSWICK	58.7%	2.4	38.1%	19.7%	1.2	70.8%	56.9%	1.9	18.4%	11.4%	1.5	11.0%	6.5%	1.4	12.2%	5.6%	1.1
BATHURST	56.5%	1.8	38.5%	26.1%	1.2	15.4%	8.7%	1.0	53.8%	65.2%	2.1	0.0%	0.0%	0.0	0.0%	0.0%	0.0
FREDERICTON	38.8%	2.5	10.5%	6.4%	1.5	36.8%	40.4%	2.7	52.6%	27.7%	1.3	47.4%	25.5%	1.3	0.0%	0.0%	0.0
MONCTON	36.1%	1.3	53.8%	41.2%	1.0	53.8%	58.8%	1.4	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SAINT JOHN	87.0%	2.7	44.7%	21.1%	1.3	95.7%	67.2%	1.9	4.3%	1.6%	1.0	2.1%	1.6%	2.0	21.3%	8.6%	1.1
NOVA SCOTIA	65.0%	1.8	38.6%	25.3%	1.2	39.5%	31.3%	1.4	18.2%	12.0%	1.2	16.3%	27.5%	3.0	6.3%	3.9%	1.1
HALIFAX	57.0%	1.9	30.6%	18.8%	1.2	41.2%	33.8%	1.5	4.7%	2.5%	1.0	27.1%	43.8%	3.0	1.2%	1.3%	2.0
SYDNEY	82.6%	1.7	50.9%	36.5%	1.2	36.8%	27.1%	1.2	38.6%	28.1%	1.2	0.0%	0.0%	0.0	14.0%	8.3%	1.0
QUEBEC	45.9%	3.7	15.9%	5.0%	1.2	14.5%	4.0%	1.0	65.3%	47.4%	2.7	72.4%	38.8%	2.0	6.3%	4.7%	2.7
CHICOUTIMI	92.2%	4.9	6.8%	2.1%	1.5	0.0%	0.0%	0.0	96.6%	47.0%	2.4	98.3%	50.9%	2.5	0.0%	0.0%	0.0
JONQUIERE	39.5%	2.5	21.9%	8.9%	1.0	15.6%	6.3%	1.0	62.5%	43.0%	1.7	78.1%	39.2%	1.2	6.3%	2.5%	1.0
MONTREAL	67.7%	7.9	2.3%	1.8%	6.0	19.8%	2.7%	1.1	73.3%	53.7%	5.8	37.2%	33.4%	7.1	10.5%	8.4%	6.3
QUEBEC CITY	59.6%	1.6	0.0%	0.0%	0.0	0.0%	0.0%	0.0	25.0%	22.2%	1.4	92.9%	77.8%	1.3	0.0%	0.0%	0.0
SHERBROOKE	59.6%	1.6	0.0%	0.0%	0.0	0.0%	0.0%	0.0	25.0%	22.2%	1.4	92.9%	77.8%	1.3	0.0%	0.0%	0.0
ONTARIO	38.6%	2.9	38.6%	18.8%	1.4	33.8%	17.7%	1.5	36.7%	20.7%	1.6	49.0%	26.7%	1.6	22.8%	16.0%	2.0
KINGSTON	45.9%	1.5	0.0%	0.0%	0.0	11.8%	7.7%	1.0	88.2%	88.5%	1.5	0.0%	0.0%	0.0	5.9%	3.8%	1.0
OTTAWA	63.8%	2.9	33.3%	16.3%	1.4	23.3%	15.1%	1.9	30.0%	26.7%	2.6	23.3%	16.3%	2.0	46.7%	25.6%	1.6
ST. CATHARINES	6.7%	1.8	50.0%	36.4%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0	66.7%	63.6%	1.8	0.0%	0.0%	0.0
SUDBURY	55.0%	2.8	18.2%	6.6%	1.0	27.3%	11.5%	1.2	0.0%	0.0%	0.0	86.4%	78.7%	2.5	4.5%	3.3%	2.0
THUNDER BAY	46.2%	1.8	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	100.0%	100.0%	1.8	0.0%	0.0%	0.0
TORONTO	37.5%	3.0	48.7%	22.9%	1.4	41.0%	17.8%	1.3	43.6%	21.2%	1.5	53.8%	24.6%	1.4	17.9%	13.6%	2.3
WINDSOR	30.4%	3.6	7.1%	3.9%	2.0	35.7%	41.2%	4.2	7.1%	3.9%	2.0	28.6%	9.8%	1.3	64.3%	41.2%	2.3
MANITOBA	20.9%	17.9	41.4%	13.9%	6.0	59.1%	36.8%	11.1	23.3%	2.0%	1.5	70.7%	47.3%	12.0	0.0%	0.0%	0.0
BRANDON	100.0%	35.4	75.0%	14.5%	6.8	100.0%	38.5%	13.6	0.0%	0.0%	0.0	87.5%	47.0%	19.0	0.0%	0.0%	0.0
WINNIPEG	12.2%	2.1	11.1%	5.3%	1.0	22.2%	10.5%	1.0	44.4%	31.6%	1.5	55.6%	52.6%	2.0	0.0%	0.0%	0.0
SASKATCHEWAN	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
REGINA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
SASKATOON	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
ALBERTA	56.4%	3.8	8.7%	4.0%	1.7	53.8%	28.5%	2.0	22.1%	11.6%	2.0	66.6%	49.1%	2.8	9.3%	6.8%	2.8
CALGARY	66.3%	3.7	5.5%	2.9%	2.0	58.2%	30.1%	1.9	16.4%	9.7%	2.2	69.1%	54.9%	3.0	3.6%	2.4%	2.5
EDMONTON	48.1%	3.3	15.4%	8.0%	1.8	30.8%	10.3%	1.1	46.2%	24.1%	1.8	53.8%	34.5%	2.1	26.9%	23.0%	2.9
MEDICINE HAT	7.7%	1.0	100.0%	100.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
RED DEER	84.6%	5.2	0.0%	0.0%	0.0	90.9%	50.9%	2.9	0.0%	0.0%	0.0	90.9%	49.1%	2.8	0.0%	0.0%	0.0
BRITISH COLUMBIA	25.3%	3.6	17.1%	8.9%	1.9	40.0%	33.3%	3.0	16.1%	6.8%	1.5	49.9%	48.5%	3.5	7.6%	2.5%	1.2
KELOWNA	22.2%	5.5	0.0%	0.0%	0.0	75.0%	63.6%	4.7	0.0%	0.0%	0.0	75.0%	36.4%	2.7	0.0%	0.0%	0.0
CAMPBELL RIVER	43.5%	2.3	0.0%	0.0%	0.0	80.0%	73.9%	2.1	0.0%	0.0%	0.0	30.0%	13.0%	1.0	30.0%	13.0%	1.0
COURTENAY	43.5%	2.3	0.0%	0.0%	0.0	80.0%	73.9%	2.1	0.0%	0.0%	0.0	30.0%	13.0%	1.0	30.0%	13.0%	1.0
VANCOUVER CMA	23.5%	3.7	21.8%	10.9%	1.9	29.5%	25.1%	3.1	20.5%	8.3%	1.5	52.2%	54.3%	3.8	3.5%	1.4%	1.5
VANCOUVER 1	15.1%	2.3	0.0%	0.0%	0.0	81.8%	48.0%	1.3	0.0%	0.0%	0.0	54.5%	44.0%	1.8	9.1%	8.0%	2.0
VANCOUVER 2	21.4%	2.0	20.0%	20.0%	2.0	13.3%	6.7%	1.0	73.3%	56.7%	1.5	26.7%	13.3%	1.0	6.7%	3.3%	1.0
VANCOUVER 3	25.0%	3.9	47.4%	25.7%	2.1	21.1%	39.2%	7.3	0.0%	0.0%	0.0	57.9%	35.1%	2.4	0.0%	0.0%	0.0
VANCOUVER 4	39.6%	6.0	15.8%	2.6%	1.0	15.8%	16.7%	6.3	5.3%	0.9%	1.0	68.4%	79.8%	7.0	0.0%	0.0%	0.0

Dist % = Percent of stores (based on weighted estimates) that carried that form of ad
 Avg = Average number of ads in distribution in all stores carrying that type of ad
 % = Weighted share of total ads, i.e. the percent of all ads represented by each type of ad

Vancouver 1: Vancouver, Richmond
 Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster
 Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
 Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Tables A-7 – A-9: Weighted – Tobacco Point-of-Sale Advertising by Brand

Table A-7A – Weighted – Tobacco Point-of-Sale Advertising – All Ads – 2005 – Chain Convenience

Table A - 7 Region	Belvedere		Benson & Hedges		Canadian Classics		du Maurier		Export A		Export A Smooth		Remaining Export A	
	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL	3.8%	2.5%	6.7%	3.4%	4.1%	2.5%	16.2%	11.0%	8.5%	5.3%	0.8%	0.4%	0.5%	0.3%
ST. JOHN'S (NL)	16.7%	14.6%	0.0%	0.0%	6.7%	6.3%	6.7%	6.3%	6.7%	6.3%	0.0%	0.0%	0.0%	0.0%
CHARLOTTETOWN (PEI)	15.0%	12.5%	0.0%	0.0%	0.0%	0.0%	5.0%	4.2%	10.0%	8.3%	0.0%	0.0%	0.0%	0.0%
NEW BRUNSWICK	10.9%	7.5%	0.0%	0.0%	0.0%	0.0%	10.7%	8.6%	16.9%	14.3%	0.0%	0.0%	0.0%	0.0%
BATHURST	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FREDERICTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	30.0%	0.0%	0.0%	0.0%	0.0%
MONCTON	20.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	8.3%	0.0%	0.0%	0.0%	0.0%
SAINT JOHN	10.3%	8.0%	0.0%	0.0%	0.0%	0.0%	17.2%	14.0%	17.2%	10.0%	0.0%	0.0%	0.0%	0.0%
NOVA SCOTIA	13.5%	10.8%	0.0%	0.0%	1.6%	1.3%	8.7%	7.0%	3.8%	3.1%	0.0%	0.0%	0.0%	0.0%
HALIFAX	17.5%	14.0%	0.0%	0.0%	2.5%	2.0%	5.0%	4.0%	2.5%	2.0%	0.0%	0.0%	0.0%	0.0%
SYDNEY	6.3%	5.0%	0.0%	0.0%	0.0%	0.0%	15.6%	12.5%	6.3%	5.0%	0.0%	0.0%	0.0%	0.0%
QUEBEC	3.3%	1.4%	11.3%	5.2%	0.4%	0.2%	16.1%	8.6%	11.9%	7.1%	0.6%	0.3%	0.7%	0.3%
CHICOUTIMI	4.3%	1.4%	4.3%	2.1%	0.0%	0.0%	8.5%	2.8%	19.1%	7.6%	0.0%	0.0%	0.0%	0.0%
JONQUIERE	3.3%	1.9%	14.3%	8.8%	0.6%	0.3%	18.2%	11.0%	10.9%	6.5%	0.0%	0.0%	0.0%	0.0%
MONTREAL	3.2%	0.8%	3.2%	0.8%	0.0%	0.0%	10.3%	6.0%	14.7%	8.6%	3.2%	0.8%	3.2%	0.8%
QUEBEC CITY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.3%	6.0%	2.2%	1.0%	0.0%	0.0%	4.4%	2.0%
SHERBROOKE	3.7%	3.9%	4.0%	2.4%	4.0%	2.1%	24.6%	19.1%	3.4%	2.0%	0.6%	0.3%	0.3%	0.1%
ONTARIO	0.0%	0.0%	0.0%	0.0%	4.2%	3.1%	29.2%	25.0%	20.8%	15.6%	0.0%	0.0%	0.0%	0.0%
KINGSTON	6.8%	3.4%	0.8%	0.4%	9.3%	5.5%	19.5%	12.3%	5.1%	2.5%	0.8%	0.4%	0.0%	0.0%
OTTAWA	0.0%	0.0%	9.5%	8.3%	0.0%	0.0%	42.9%	37.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ST. CATHARINES	0.0%	0.0%	2.6%	1.1%	7.7%	3.3%	20.5%	26.7%	10.3%	5.6%	2.6%	1.1%	0.0%	0.0%
SUDBURY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	32.4%	22.9%	2.9%	2.1%	0.0%	0.0%	0.0%	0.0%
THUNDER BAY	4.2%	5.5%	5.8%	3.4%	2.6%	1.4%	24.7%	18.2%	1.1%	0.7%	0.5%	0.2%	0.5%	0.2%
TORONTO	0.0%	0.0%	0.9%	0.3%	2.6%	1.0%	26.1%	27.4%	7.0%	5.2%	0.0%	0.0%	0.0%	0.0%
WINDSOR	0.0%	0.0%	3.9%	2.5%	15.0%	10.4%	7.3%	6.2%	4.9%	3.2%	2.1%	2.7%	1.0%	1.3%
MANITOBA	0.0%	0.0%	0.0%	0.0%	14.3%	9.4%	14.3%	9.4%	7.1%	3.1%	14.3%	12.5%	7.1%	6.3%
BRANDON	0.0%	0.0%	4.5%	3.2%	15.2%	10.6%	6.1%	5.3%	4.5%	3.2%	0.0%	0.0%	0.0%	0.0%
WINNIPEG	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SASKATCHEWAN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
REGINA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SASKATOON	0.7%	0.3%	4.2%	2.2%	12.8%	8.4%	9.0%	5.4%	9.1%	5.5%	1.6%	0.8%	0.8%	0.5%
ALBERTA	1.0%	0.5%	5.8%	3.1%	14.2%	9.8%	7.7%	4.4%	9.0%	5.5%	1.0%	0.5%	0.0%	0.0%
CALGARY	0.0%	0.0%	0.7%	0.4%	8.9%	5.2%	12.6%	8.9%	9.6%	6.3%	3.7%	1.9%	3.0%	1.9%
EDMONTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MEDICINE HAT	0.0%	0.0%	0.0%	0.0%	16.7%	5.7%	8.3%	2.9%	8.3%	2.9%	0.0%	0.0%	0.0%	0.0%
RED DEER	0.0%	0.0%	0.0%	0.0%	6.8%	5.9%	12.7%	13.0%	4.4%	1.5%	1.9%	1.2%	0.0%	0.0%
BRITISH COLUMBIA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
KELOWNA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.2%	18.8%	9.1%	6.3%	9.1%	6.3%	0.0%	0.0%
CAMPBELL RIVER	0.0%	0.0%	0.0%	0.0%	8.7%	6.8%	11.0%	12.8%	4.1%	1.3%	1.0%	0.9%	0.0%	0.0%
COURTENAY	0.0%	0.0%	0.0%	0.0%	5.4%	2.6%	8.1%	3.9%	2.7%	1.3%	2.7%	3.9%	0.0%	0.0%
VANCOUVER CMA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.0%	29.2%	10.0%	4.2%	0.0%	0.0%	0.0%	0.0%
VANCOUVER 1	0.0%	0.0%	0.0%	0.0%	20.0%	11.4%	12.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VANCOUVER 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	4.5%	0.0%	0.0%	0.0%	0.0%
VANCOUVER 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VANCOUVER 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

N/A indicates that stores of this type were not available in this region.

% Dist = Percentage of all stores in the region carrying all ad types for brand specified

Brand Shr = brand's share of all ads

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-7B – Weighted – Tobacco Point-of-Sale Advertising – All Ads – 2005 – Chain Convenience

Region	Matinee		Players		Rothmans		Sportsman		Other	
	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL	3.7%	1.9%	9.8%	6.8%	0.9%	0.5%	0.1%	0.0%	15.3%	15.4%
ST. JOHN'S (NL)	0.0%	0.0%	10.0%	10.4%	0.0%	0.0%	0.0%	0.0%	10.0%	6.3%
CHARLOTTETOWN (PEI)	0.0%	0.0%	10.0%	8.3%	0.0%	0.0%	0.0%	0.0%	20.0%	16.7%
NEW BRUNSWICK	6.4%	3.7%	8.5%	4.9%	2.1%	1.2%	0.0%	0.0%	12.8%	9.7%
BATHURST	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FREDERICTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	20.0%
MONCTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.0%	25.0%
SAINT JOHN	10.3%	6.0%	13.8%	8.0%	3.4%	2.0%	0.0%	0.0%	3.4%	2.0%
NOVA SCOTIA	3.3%	2.6%	20.6%	16.5%	1.1%	0.9%	0.0%	0.0%	8.2%	7.8%
HALIFAX	0.0%	0.0%	25.0%	20.0%	0.0%	0.0%	0.0%	0.0%	7.5%	8.0%
SYDNEY	9.4%	7.5%	12.5%	10.0%	3.1%	2.5%	0.0%	0.0%	9.4%	7.5%
QUEBEC	3.5%	1.6%	7.4%	4.5%	0.7%	0.3%	0.1%	0.1%	18.5%	20.5%
CHICOUTIMI										
JONQUIERE	6.4%	2.8%	10.6%	4.2%	0.0%	0.0%	0.0%	0.0%	23.4%	29.2%
MONTREAL	3.0%	1.7%	7.3%	4.4%	0.0%	0.0%	0.0%	0.0%	17.0%	15.6%
QUEBEC CITY	3.2%	0.8%	7.7%	5.1%	3.8%	0.9%	0.6%	0.2%	20.5%	25.4%
SHERBROOKE	11.1%	5.0%	2.2%	1.0%	0.0%	0.0%	0.0%	0.0%	33.3%	35.0%
ONTARIO	4.7%	2.5%	11.7%	8.8%	0.9%	0.6%	0.0%	0.0%	10.1%	8.3%
KINGSTON	4.2%	3.1%	4.2%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OTTAWA	0.0%	0.0%	10.2%	8.5%	0.0%	0.0%	0.0%	0.0%	16.9%	16.9%
ST. CATHARINES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	4.2%
SUDBURY	5.1%	2.2%	12.8%	5.6%	0.0%	0.0%	0.0%	0.0%	10.3%	4.4%
THUNDER BAY	0.0%	0.0%	26.5%	18.8%	0.0%	0.0%	0.0%	0.0%	2.9%	6.3%
TORONTO	6.8%	3.4%	10.5%	8.4%	1.6%	0.9%	0.0%	0.0%	10.0%	7.7%
WINDSOR	4.3%	1.9%	21.7%	12.9%	0.0%	0.0%	0.0%	0.0%	3.5%	1.3%
MANITOBA	2.3%	1.5%	1.0%	1.3%	0.0%	0.0%	0.0%	0.0%	24.6%	20.9%
BRANDON	7.1%	3.1%	7.1%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WINNIPEG	1.5%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	28.8%	26.6%
SASKATCHEWAN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
REGINA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SASKATOON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ALBERTA	3.4%	2.4%	12.2%	8.9%	1.5%	1.1%	0.0%	0.0%	15.9%	14.6%
CALGARY	3.9%	2.9%	11.6%	8.2%	1.9%	1.5%	0.0%	0.0%	16.5%	13.7%
EDMONTON	2.2%	1.5%	13.3%	10.4%	0.7%	0.4%	0.0%	0.0%	12.6%	13.3%
MEDICINE HAT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	50.0%
RED DEER	4.2%	1.4%	16.7%	10.0%	0.0%	0.0%	0.0%	0.0%	20.8%	27.1%
BRITISH COLUMBIA	3.6%	1.6%	13.9%	9.8%	0.0%	0.0%	0.0%	0.0%	17.2%	16.9%
KELOWNA	20.0%	15.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	25.0%
CAMPBELL RIVER										
COURTENAY	0.0%	0.0%	27.3%	18.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VANCOUVER CMA	2.3%	0.7%	13.3%	9.9%	0.0%	0.0%	0.0%	0.0%	19.6%	17.5%
VANCOUVER 1	2.7%	1.3%	18.9%	14.5%	0.0%	0.0%	0.0%	0.0%	21.6%	22.4%
VANCOUVER 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	16.7%
VANCOUVER 3	4.0%	0.8%	8.0%	9.8%	0.0%	0.0%	0.0%	0.0%	16.0%	11.4%
VANCOUVER 4	0.0%	0.0%	22.2%	9.1%	0.0%	0.0%	0.0%	0.0%	22.2%	36.4%

N/A indicates that stores of this type were not available in this region.

% Dist = Percentage of all stores in the region carrying all ad types for brand specified

Brand Shr = brand's share of all ads

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-8A – Weighted – Tobacco Point-of-Sale Advertising – All Ads – 2005 – Gas Stores/Kiosks

Region	Belvedere		Benson & Hedges		Canadian Classics		du Maurier		Export A		Export A Smooth		Remaining Export A	
	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL	5.2%	2.8%	4.1%	2.6%	6.0%	4.2%	16.1%	11.3%	6.4%	4.7%	0.9%	0.9%	0.6%	0.5%
ST. JOHN'S (NL)	18.4%	13.2%	1.3%	0.9%	14.5%	9.6%	9.2%	7.9%	3.9%	2.6%	0.0%	0.0%	0.0%	0.0%
CHARLOTTETOWN (PEI)	14.0%	13.8%	0.0%	0.0%	0.0%	0.0%	2.0%	1.7%	6.0%	5.2%	0.0%	0.0%	0.0%	0.0%
NEW BRUNSWICK	15.4%	12.5%	2.0%	1.8%	3.1%	2.8%	13.8%	10.0%	12.4%	8.6%	0.0%	0.0%	0.0%	0.0%
BATHURST	4.5%	3.6%	0.0%	0.0%	0.0%	0.0%	13.6%	10.7%	13.6%	10.7%	0.0%	0.0%	0.0%	0.0%
FREDERICTON	26.1%	20.6%	0.0%	0.0%	8.7%	8.8%	4.3%	2.9%	8.7%	5.9%	0.0%	0.0%	0.0%	0.0%
MONCTON	25.0%	30.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	10.0%	0.0%	0.0%	0.0%	0.0%
SAINT JOHN	12.2%	7.9%	4.1%	3.5%	2.7%	1.8%	21.6%	14.9%	13.5%	8.8%	0.0%	0.0%	0.0%	0.0%
NOVA SCOTIA	10.9%	8.6%	2.0%	1.5%	1.9%	1.4%	7.2%	5.4%	7.1%	5.3%	1.9%	1.4%	0.7%	0.5%
HALIFAX	14.9%	11.4%	1.1%	0.8%	3.2%	2.3%	2.1%	1.5%	5.3%	3.8%	2.1%	1.5%	0.0%	0.0%
SYDNEY	4.9%	3.9%	3.3%	2.6%	0.0%	0.0%	14.8%	11.8%	9.8%	7.9%	1.6%	1.3%	1.6%	1.3%
QUEBEC	2.9%	1.3%	5.4%	2.1%	0.5%	0.2%	16.7%	9.6%	11.2%	8.3%	0.4%	0.2%	1.2%	0.5%
CHICOUTIMI														
JONQUIERE	3.1%	1.2%	3.1%	1.6%	0.0%	0.0%	8.3%	3.7%	10.4%	4.9%	1.0%	0.4%	3.1%	1.6%
MONTREAL	3.3%	2.0%	7.4%	4.5%	0.8%	0.5%	19.7%	13.0%	11.5%	11.0%	0.0%	0.0%	0.8%	0.5%
QUEBEC CITY	2.1%	0.8%	1.4%	0.3%	0.0%	0.0%	12.1%	7.9%	11.3%	6.7%	1.4%	0.3%	1.4%	0.3%
SHERBROOKE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.8%	11.1%	7.4%	5.6%	0.0%	0.0%	0.0%	0.0%
ONTARIO	4.1%	2.3%	5.8%	3.6%	1.9%	1.2%	24.7%	18.6%	3.9%	2.6%	1.2%	1.9%	0.0%	0.0%
KINGSTON	0.0%	0.0%	5.6%	1.7%	0.0%	0.0%	27.8%	8.3%	0.0%	0.0%	5.6%	33.3%	0.0%	0.0%
OTTAWA	10.9%	6.0%	3.1%	1.6%	3.9%	2.8%	25.0%	18.8%	3.9%	4.0%	0.0%	0.0%	0.0%	0.0%
ST. CATHARINES	0.0%	0.0%	14.3%	25.0%	0.0%	0.0%	42.9%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUDBURY	0.0%	0.0%	12.1%	9.4%	3.4%	1.9%	17.2%	15.1%	12.1%	6.6%	5.2%	2.8%	0.0%	0.0%
THUNDER BAY	8.8%	6.8%	0.0%	0.0%	0.0%	0.0%	38.2%	31.8%	5.9%	4.5%	0.0%	0.0%	0.0%	0.0%
TORONTO	2.1%	1.2%	6.8%	4.3%	1.4%	0.8%	23.3%	17.7%	3.4%	2.0%	1.4%	0.8%	0.0%	0.0%
WINDSOR	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	35.5%	32.9%	3.2%	2.6%	0.0%	0.0%	0.0%	0.0%
MANITOBA	2.1%	1.9%	3.7%	1.9%	14.7%	12.2%	15.4%	10.6%	4.6%	4.4%	4.2%	3.5%	3.9%	3.3%
BRANDON	4.7%	2.4%	4.7%	1.8%	13.3%	12.3%	14.8%	10.1%	10.2%	5.4%	9.4%	4.3%	8.6%	4.0%
WINNIPEG	0.0%	0.0%	2.9%	2.2%	15.9%	12.0%	15.9%	13.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SASKATCHEWAN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
REGINA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SASKATOON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALBERTA	0.7%	0.3%	3.0%	2.1%	12.8%	8.0%	11.7%	7.7%	5.4%	3.2%	0.6%	0.3%	0.5%	0.4%
CALGARY	1.2%	0.6%	4.8%	3.2%	13.8%	8.4%	9.6%	6.1%	4.8%	2.6%	0.6%	0.3%	0.0%	0.0%
EDMONTON	0.0%	0.0%	0.0%	0.0%	10.9%	6.7%	17.3%	13.9%	6.4%	4.1%	0.9%	0.5%	1.8%	1.5%
MEDICINE HAT	0.0%	0.0%	0.0%	0.0%	12.5%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
RED DEER	0.0%	0.0%	2.2%	1.6%	13.3%	8.6%	8.9%	3.9%	6.7%	3.9%	0.0%	0.0%	0.0%	0.0%
BRITISH COLUMBIA	0.4%	0.2%	4.7%	5.6%	8.4%	5.9%	14.0%	12.4%	4.4%	2.5%	0.8%	0.3%	0.0%	0.0%
KELOWNA	0.0%	0.0%	1.5%	1.0%	0.0%	0.0%	19.1%	10.8%	8.8%	6.7%	0.0%	0.0%	0.0%	0.0%
CAMPBELL RIVER														
COURTENAY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	10.0%	11.1%	7.5%	0.0%	0.0%	0.0%	0.0%
VANCOUVER CMA	0.6%	0.2%	6.0%	7.0%	11.1%	7.8%	13.4%	12.9%	2.6%	1.1%	1.0%	0.4%	0.0%	0.0%
VANCOUVER 1	0.0%	0.0%	1.7%	0.9%	13.3%	10.3%	11.7%	6.9%	1.7%	0.9%	0.0%	0.0%	0.0%	0.0%
VANCOUVER 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VANCOUVER 3	1.3%	0.5%	9.0%	8.3%	11.5%	8.3%	16.7%	17.6%	2.6%	0.9%	1.3%	0.5%	0.0%	0.0%
VANCOUVER 4	0.0%	0.0%	13.6%	18.4%	9.1%	2.6%	9.1%	10.5%	9.1%	2.6%	4.5%	1.3%	0.0%	0.0%

% Dist = Percentage of all stores in the region carrying all ad types for brand specified
Brand Shr = brand's share of all ads

Vancouver 1: Vancouver, Richmond
Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North Vancouver, West Vancouver

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-8B – Weighted – Tobacco Point-of-Sale Advertising – All Ads – 2005 – Gas Stores/Kiosks

Region	Matinee		Players		Rothmans		Sportsman		Other	
	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL	2.7%	1.9%	9.2%	5.9%	1.0%	0.6%	0.0%	0.0%	14.2%	14.4%
ST. JOHN'S (NL)	1.3%	0.9%	5.3%	4.4%	0.0%	0.0%	0.0%	0.0%	11.8%	10.5%
CHARLOTTETOWN (PEI)	0.0%	0.0%	20.0%	17.2%	0.0%	0.0%	0.0%	0.0%	14.0%	12.1%
NEW BRUNSWICK	3.4%	2.4%	6.0%	4.6%	0.7%	0.5%	0.0%	0.0%	9.8%	6.8%
BATHURST	4.5%	3.6%	4.5%	3.6%	0.0%	0.0%	0.0%	0.0%	22.7%	17.9%
FREDERICTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.4%	11.8%
MONCTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	10.0%
SAINT JOHN	5.4%	3.5%	10.8%	7.9%	1.4%	0.9%	0.0%	0.0%	1.4%	0.9%
NOVA SCOTIA	4.6%	3.4%	10.2%	8.6%	0.7%	0.5%	0.0%	0.0%	14.1%	13.4%
HALIFAX	0.0%	0.0%	14.9%	12.1%	0.0%	0.0%	0.0%	0.0%	17.0%	16.7%
SYDNEY	11.5%	9.2%	3.3%	2.6%	1.6%	1.3%	0.0%	0.0%	9.8%	7.9%
QUEBEC	1.4%	0.5%	8.4%	3.5%	0.9%	0.3%	0.0%	0.0%	18.1%	23.4%
CHICOUTIMI										
JONQUIERE	4.2%	1.6%	7.3%	3.7%	0.0%	0.0%	0.0%	0.0%	29.2%	31.3%
MONTREAL	0.8%	0.5%	9.8%	6.0%	0.8%	0.5%	0.0%	0.0%	12.3%	11.5%
QUEBEC CITY	1.4%	0.3%	5.0%	1.4%	1.4%	0.3%	0.0%	0.0%	28.4%	31.9%
SHERBROOKE	3.7%	2.8%	7.4%	5.6%	0.0%	0.0%	0.0%	0.0%	25.9%	25.0%
ONTARIO	4.1%	3.5%	8.0%	5.4%	2.2%	1.4%	0.0%	0.0%	11.2%	9.3%
KINGSTON	11.1%	3.3%	5.6%	1.7%	0.0%	0.0%	0.0%	0.0%	5.6%	1.7%
OTTAWA	0.8%	0.4%	5.5%	2.8%	0.0%	0.0%	0.0%	0.0%	15.6%	13.6%
ST. CATHARINES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUDBURY	1.7%	0.9%	3.4%	2.8%	0.0%	0.0%	0.0%	0.0%	12.1%	10.4%
THUNDER BAY	0.0%	0.0%	8.8%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TORONTO	5.5%	5.1%	8.9%	6.7%	3.4%	2.4%	0.0%	0.0%	11.0%	9.1%
WINDSOR	3.2%	2.6%	16.1%	7.9%	0.0%	0.0%	0.0%	0.0%	6.5%	3.9%
MANITOBA	4.3%	3.8%	3.7%	2.1%	0.7%	0.4%	0.4%	0.3%	11.7%	5.5%
BRANDON	7.8%	4.4%	4.7%	2.1%	1.6%	0.5%	0.8%	0.3%	4.7%	2.3%
WINNIPEG	1.4%	1.1%	2.9%	2.2%	0.0%	0.0%	0.0%	0.0%	17.4%	19.6%
SASKATCHEWAN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
REGINA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SASKATOON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALBERTA	2.4%	1.3%	14.7%	11.1%	0.7%	0.3%	0.0%	0.0%	14.4%	15.3%
CALGARY	1.8%	0.9%	15.6%	12.7%	1.2%	0.6%	0.0%	0.0%	14.4%	14.7%
EDMONTON	0.9%	0.5%	13.6%	10.3%	0.0%	0.0%	0.0%	0.0%	10.9%	12.4%
MEDICINE HAT	0.0%	0.0%	12.5%	10.0%	0.0%	0.0%	0.0%	0.0%	25.0%	30.0%
RED DEER	8.9%	3.9%	13.3%	7.0%	0.0%	0.0%	0.0%	0.0%	22.2%	21.1%
BRITISH COLUMBIA	3.7%	2.6%	9.9%	8.2%	0.7%	1.2%	0.0%	0.0%	18.5%	11.1%
KELOWNA	4.4%	3.1%	14.7%	17.5%	1.5%	1.5%	0.0%	0.0%	11.8%	9.3%
CAMPBELL RIVER										
COURTENAY	11.1%	7.5%	29.6%	22.5%	0.0%	0.0%	0.0%	0.0%	3.7%	2.5%
VANCOUVER CMA	2.6%	2.1%	6.5%	4.9%	0.6%	1.2%	0.0%	0.0%	21.7%	12.2%
VANCOUVER 1	3.3%	1.7%	11.7%	8.6%	0.0%	0.0%	0.0%	0.0%	25.0%	20.7%
VANCOUVER 2	0.0%	0.0%	7.1%	5.0%	0.0%	0.0%	0.0%	0.0%	35.7%	40.0%
VANCOUVER 3	1.3%	0.5%	2.6%	3.7%	1.3%	2.3%	0.0%	0.0%	19.2%	7.4%
VANCOUVER 4	9.1%	10.5%	4.5%	1.3%	0.0%	0.0%	0.0%	0.0%	9.1%	2.6%

% Dist = Percentage of all stores in the region carrying all ad types for brand specified

Brand Shr = brand's share of all ads

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-9A – Weighted – Tobacco Point-of-Sale Advertising – All Ads – 2005 – Independent Convenience

Table A - 9		Belvedere		Benson & Hedges		Canadian Classics		du Maurier		Export A		Export A Smooth		Remaining Export A		
Region	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL	5.2%	2.9%	5.5%	3.4%	4.8%	4.4%	14.9%	9.7%	8.3%	5.5%	1.4%	1.0%	0.9%	0.6%		
ST. JOHN'S	6.9%	4.6%	1.3%	0.6%	27.7%	27.8%	10.7%	5.6%	1.9%	0.9%	0.0%	0.0%	0.0%	0.0%		
CHARLOTTETOWN (PEI)	20.4%	17.2%	0.0%	0.0%	0.0%	0.0%	4.1%	3.4%	8.2%	6.9%	0.0%	0.0%	0.0%	0.0%		
NEW BRUNSWICK	13.5%	10.8%	0.4%	0.3%	7.5%	5.5%	13.0%	9.5%	11.1%	7.5%	0.8%	0.5%	0.4%	0.3%		
BATHURST	17.1%	15.2%	0.0%	0.0%	2.9%	2.2%	8.6%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
FREDERICTON	18.2%	18.1%	0.0%	0.0%	12.7%	9.6%	3.6%	2.1%	5.5%	3.2%	0.0%	0.0%	0.0%	0.0%		
MONCTON	13.3%	11.8%	0.0%	0.0%	0.0%	0.0%	16.7%	14.7%	3.3%	2.9%	0.0%	0.0%	0.0%	0.0%		
SAINT JOHN	11.7%	7.8%	0.6%	0.4%	7.6%	5.1%	15.8%	11.7%	15.2%	10.2%	1.2%	0.8%	0.6%	0.4%		
NOVA SCOTIA	9.6%	6.7%	2.5%	1.7%	0.8%	1.8%	8.1%	6.0%	10.4%	8.0%	2.0%	1.6%	1.4%	1.0%		
HALIFAX	12.5%	8.4%	1.4%	0.9%	0.9%	2.5%	7.9%	5.3%	7.9%	5.6%	1.4%	1.3%	0.0%	0.0%		
SYDNEY	5.0%	3.6%	4.3%	3.1%	0.7%	0.5%	8.6%	7.3%	14.3%	12.0%	2.9%	2.1%	3.6%	2.6%		
QUEBEC	3.7%	2.1%	7.2%	3.8%	0.1%	0.0%	13.7%	7.5%	11.4%	7.5%	2.3%	1.1%	1.3%	0.6%		
CHICOUTIMI																
JONQUIERE	6.1%	3.0%	5.3%	2.1%	0.0%	0.0%	5.3%	2.4%	14.9%	7.7%	0.9%	0.3%	4.8%	2.1%		
MONTREAL	2.9%	1.9%	8.7%	6.3%	0.0%	0.0%	17.3%	11.4%	11.5%	7.6%	1.9%	1.3%	0.0%	0.0%		
QUEBEC CITY	5.4%	2.0%	4.8%	1.6%	0.3%	0.1%	7.2%	4.4%	11.3%	7.7%	4.2%	1.0%	4.2%	1.0%		
SHERBROOKE	2.9%	2.2%	0.0%	0.0%	0.0%	0.0%	8.8%	6.7%	1.5%	2.2%	0.0%	0.0%	0.0%	0.0%		
ONTARIO	4.1%	2.3%	7.0%	4.6%	2.0%	1.4%	23.7%	19.3%	4.6%	2.6%	0.5%	0.3%	0.5%	0.3%		
KINGSTON	0.0%	0.0%	2.4%	1.9%	2.4%	1.9%	11.9%	9.6%	9.5%	7.7%	0.0%	0.0%	0.0%	0.0%		
OTTAWA	4.6%	2.3%	4.6%	2.9%	4.6%	3.5%	24.1%	21.5%	3.4%	1.7%	0.0%	0.0%	0.0%	0.0%		
ST. CATHARINES	0.0%	0.0%	5.9%	4.5%	0.0%	0.0%	29.4%	22.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
SLUDBURY	1.5%	0.8%	10.6%	6.6%	4.5%	3.3%	21.2%	21.3%	9.1%	5.7%	0.0%	0.0%	0.0%	0.0%		
THUNDER BAY	9.1%	7.1%	0.0%	0.0%	0.0%	0.0%	33.3%	26.2%	6.1%	4.8%	0.0%	0.0%	0.0%	0.0%		
TORONTO	4.5%	2.5%	8.2%	5.5%	1.5%	0.8%	23.1%	17.8%	4.5%	2.5%	0.7%	0.4%	0.7%	0.4%		
WINDSOR	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	36.1%	28.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
MANITOBA	8.0%	2.3%	13.6%	5.6%	10.2%	7.1%	10.2%	8.8%	5.7%	5.3%	8.0%	6.6%	5.7%	3.1%		
BRANDON	7.8%	2.1%	12.5%	5.3%	9.4%	6.7%	10.9%	9.0%	6.3%	5.5%	10.9%	7.1%	7.8%	3.4%		
WINNIPEG	8.3%	5.3%	16.7%	10.5%	12.5%	13.2%	8.3%	5.3%	4.2%	2.6%	0.0%	0.0%	0.0%	0.0%		
SASKATCHEWAN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A		
REGINA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A		
SASKATOON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A		
ALBERTA	0.3%	0.1%	3.4%	1.5%	9.9%	7.0%	11.4%	6.2%	9.5%	5.1%	0.3%	0.1%	0.3%	0.1%		
CALGARY	0.5%	0.2%	5.4%	2.4%	10.9%	7.8%	9.8%	4.6%	9.2%	5.3%	0.0%	0.0%	0.5%	0.2%		
EDMONTON	0.0%	0.0%	0.0%	0.0%	5.1%	3.4%	16.5%	12.1%	13.9%	7.5%	1.3%	0.6%	0.0%	0.0%		
MEDICINE HAT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
RED DEER	0.0%	0.0%	0.0%	0.0%	15.8%	9.6%	10.5%	3.5%	2.6%	0.9%	0.0%	0.0%	0.0%	0.0%		
BRITISH COLUMBIA	1.4%	1.1%	5.4%	5.7%	6.4%	3.7%	16.3%	11.9%	4.2%	3.3%	0.0%	0.0%	0.0%	0.0%		
KELOWNA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	2.3%	9.1%	6.8%	0.0%	0.0%	0.0%	0.0%		
CAMPBELL RIVER																
COURTENAY	0.0%	0.0%	0.0%	0.0%	3.2%	4.3%	22.6%	15.2%	9.7%	6.5%	0.0%	0.0%	0.0%	0.0%		
VANCOUVER CMA	1.9%	1.3%	7.2%	7.0%	7.6%	4.1%	15.2%	12.4%	2.4%	2.5%	0.0%	0.0%	0.0%	0.0%		
VANCOUVER 1	0.0%	0.0%	0.0%	0.0%	6.9%	4.0%	10.3%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
VANCOUVER 2	2.6%	3.3%	2.6%	1.7%	2.6%	1.7%	23.7%	21.7%	2.6%	1.7%	0.0%	0.0%	0.0%	0.0%		
VANCOUVER 3	0.0%	0.0%	4.4%	2.0%	13.3%	4.7%	24.4%	26.4%	2.2%	0.7%	0.0%	0.0%	0.0%	0.0%		
VANCOUVER 4	4.0%	1.8%	18.0%	13.2%	8.0%	4.4%	4.0%	3.5%	4.0%	4.4%	0.0%	0.0%	0.0%	0.0%		

% Dist = Percentage of all stores in the region carrying all ad types for brand specified
Brand Shr = brand's share of all ads

Vancouver 1: Vancouver, Richmond
Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North Vancouver, West Vancouver

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-9B – Weighted – Tobacco Point-of-Sale Advertising – All Ads – 2005 – Independent Convenience

Region	Matinee		Players		Rothmans		Sportsman		Other	
	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL	3.4%	2.4%	8.0%	4.8%	1.4%	0.9%	0.0%	0.0%	14.5%	14.4%
ST. JOHN'S	0.6%	0.3%	5.7%	3.1%	0.0%	0.0%	0.0%	0.0%	10.7%	7.1%
CHARLOTTETOWN (PEI)	0.0%	0.0%	10.2%	8.6%	0.0%	0.0%	0.0%	0.0%	16.3%	13.8%
NEW BRUNSWICK	4.0%	2.7%	9.5%	6.6%	0.8%	0.5%	0.0%	0.0%	8.1%	5.9%
BATHURST	2.9%	2.2%	11.4%	8.7%	0.0%	0.0%	0.0%	0.0%	20.0%	15.2%
FREDERICTON	0.0%	0.0%	1.8%	1.1%	0.0%	0.0%	0.0%	0.0%	23.6%	16.0%
MONCTON	0.0%	0.0%	3.3%	2.9%	0.0%	0.0%	0.0%	0.0%	20.0%	17.6%
SAINT JOHN	5.8%	3.9%	12.3%	8.6%	1.2%	0.8%	0.0%	0.0%	0.6%	0.4%
NOVA SCOTIA	3.1%	3.9%	9.0%	8.2%	1.1%	0.8%	0.0%	0.0%	12.1%	10.4%
HALIFAX	0.9%	0.9%	11.1%	10.6%	0.0%	0.0%	0.0%	0.0%	16.7%	14.4%
SYDNEY	6.4%	8.9%	5.7%	4.2%	2.9%	2.1%	0.0%	0.0%	5.0%	3.6%
QUEBEC	2.1%	1.1%	8.0%	3.9%	1.6%	1.0%	0.0%	0.0%	18.9%	21.4%
CHICOUTIMI										
JONQUIERE	3.5%	1.4%	8.8%	4.4%	0.4%	0.2%	0.4%	0.2%	23.7%	26.3%
MONTREAL	1.0%	0.6%	8.7%	5.7%	1.0%	1.3%	0.0%	0.0%	16.3%	13.9%
QUEBEC CITY	4.5%	1.4%	6.0%	1.8%	4.2%	1.0%	0.0%	0.0%	22.4%	28.0%
SHERBROOKE	5.9%	4.4%	5.9%	4.4%	0.0%	0.0%	0.0%	0.0%	33.8%	30.0%
ONTARIO	6.9%	5.2%	7.5%	5.1%	2.5%	1.4%	0.0%	0.0%	9.4%	7.6%
KINGSTON	0.0%	0.0%	9.5%	7.7%	0.0%	0.0%	0.0%	0.0%	23.8%	21.2%
OTTAWA	2.3%	1.2%	8.0%	4.1%	0.0%	0.0%	0.0%	0.0%	13.8%	12.8%
ST. CATHARINES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	29.4%	22.7%
SUDBURY	6.1%	3.3%	6.1%	4.9%	0.0%	0.0%	0.0%	0.0%	7.6%	4.1%
THUNDER BAY	0.0%	0.0%	15.2%	11.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TORONTO	9.0%	7.2%	6.7%	3.8%	3.7%	2.1%	0.0%	0.0%	8.2%	6.8%
WINDSOR	2.8%	1.0%	16.7%	18.6%	0.0%	0.0%	0.0%	0.0%	5.6%	2.0%
MANITOBA	5.7%	4.1%	4.6%	2.0%	0.0%	0.0%	0.0%	0.0%	9.1%	5.0%
BRANDON	7.8%	4.4%	6.3%	2.1%	0.0%	0.0%	0.0%	0.0%	7.8%	4.4%
WINNIPEG	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	13.2%
SASKATCHEWAN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
REGINA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SASKATOON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ALBERTA	3.1%	1.5%	9.8%	8.1%	1.3%	0.9%	0.3%	0.1%	19.5%	19.2%
CALGARY	3.3%	1.7%	8.7%	7.3%	1.6%	1.0%	0.0%	0.0%	20.1%	19.4%
EDMONTON	0.0%	0.0%	12.7%	9.2%	1.3%	1.1%	1.3%	0.6%	15.2%	15.5%
MEDICINE HAT	50.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
RED DEER	5.3%	1.8%	10.5%	9.6%	0.0%	0.0%	0.0%	0.0%	26.3%	24.6%
BRITISH COLUMBIA	5.2%	6.0%	10.9%	9.6%	0.5%	0.5%	0.0%	0.0%	12.0%	8.2%
KELOWNA	0.0%	0.0%	27.3%	34.1%	0.0%	0.0%	0.0%	0.0%	18.2%	6.8%
CAMPBELL RIVER										
COURTENAY	12.9%	8.7%	16.1%	13.0%	0.0%	0.0%	0.0%	0.0%	3.2%	2.2%
VANCOUVER CMA	3.6%	6.2%	8.4%	6.7%	0.6%	0.6%	0.0%	0.0%	13.7%	9.1%
VANCOUVER 1	0.0%	0.0%	13.8%	12.0%	0.0%	0.0%	0.0%	0.0%	31.0%	28.0%
VANCOUVER 2	2.6%	1.7%	10.5%	10.0%	0.0%	0.0%	0.0%	0.0%	13.2%	8.3%
VANCOUVER 3	2.2%	5.4%	4.4%	1.4%	0.0%	0.0%	0.0%	0.0%	6.7%	9.5%
VANCOUVER 4	8.0%	9.6%	6.0%	7.5%	2.0%	1.3%	0.0%	0.0%	8.0%	4.4%

% Dist = Percentage of all stores in the region carrying all ad types for brand specified
Brand Shr = brand's share of all ads

Vancouver 1: Vancouver, Richmond
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Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Tables A-10 – A-14: Retailer Sales Compliance under “Operation ID” by Class of Trade

Table A-10 – Weighted – Retailer Sales Compliance under “Operation ID” by Class of Trade – 2005 – Chain Convenience

Region	All Stores	% Unwilling to Sell (Compliant) - Stores that do not Participate in "Operation ID"	% Unwilling to Sell (Compliant) - Stores that Participate in "Operation ID"	Compliance Point Difference	Likely that Change is Statistically Significant (Yes/No)
NATIONAL	80.8%	79.2%	85.8%	6.6%	Yes
ST. JOHN'S (NL)	98.4%	100.0%	88.9%	-11.1%	Yes
CHARLOTTETOWN (PEI)	90.1%	100.0%	90.0%	-10.0%	Yes
NEW BRUNSWICK	84.1%	85.3%	79.9%	-5.4%	Yes
BATHURST	84.2%	N/A	N/A	N/A	N/A
FREDERICTON	94.3%	N/A	100.0%	N/A	N/A
MONCTON	61.1%	66.7%	55.6%	-11.1%	Yes
SAINT JOHN	99.0%	100.0%	100.0%	0.0%	No
NOVA SCOTIA	84.5%	80.1%	83.4%	3.3%	Yes
HALIFAX	80.5%	73.7%	75.0%	1.3%	No
SYDNEY	92.5%	100.0%	100.0%	0.0%	No
QUEBEC	70.4%	71.2%	62.5%	-8.7%	Yes
CHICOUTIMI					
JONQUIERE	90.7%	N/A	100.0%	N/A	N/A
MONTREAL	69.5%	74.4%	35.7%	-38.7%	Yes
QUEBEC CITY	68.3%	57.1%	70.0%	12.9%	Yes
SHERBROOKE	73.3%	60.0%	100.0%	40.0%	Yes
ONTARIO	77.1%	79.6%	91.4%	11.8%	Yes
KINGSTON	94.4%	100.0%	100.0%	0.0%	No
OTTAWA	91.0%	91.7%	96.8%	5.1%	Yes
ST. CATHARINES	86.5%	79.4%	97.1%	17.6%	Yes
SUDBURY	88.1%	100.0%	93.3%	-6.7%	Yes
THUNDER BAY	66.5%	75.0%	80.0%	5.0%	Yes
TORONTO	69.7%	75.0%	84.6%	9.6%	Yes
WINDSOR	94.2%	96.2%	92.9%	-3.3%	Yes
MANITOBA	72.0%	64.7%	91.4%	26.7%	Yes
BRANDON	77.2%	N/A	100.0%	N/A	N/A
WINNIPEG	71.6%	64.7%	90.0%	25.3%	Yes
SASKATCHEWAN	96.0%	100.0%	100.0%	0.0%	No
REGINA	92.9%	100.0%	100.0%	0.0%	No
SASKATOON	99.0%	100.0%	100.0%	0.0%	No
ALBERTA	84.7%	89.9%	94.1%	4.2%	Yes
CALGARY	90.3%	91.2%	96.4%	5.2%	Yes
EDMONTON	78.4%	88.1%	94.1%	6.0%	Yes
MEDICINE HAT	88.8%	100.0%	50.0%	-50.0%	Yes
RED DEER	78.3%	100.0%	100.0%	0.0%	No
BRITISH COLUMBIA	91.8%	93.4%	94.5%	1.2%	No
KELOWNA	94.1%	100.0%	85.7%	-14.3%	Yes
CAMPBELL RIVER					
COURTENAY	78.5%	100.0%	100.0%	0.0%	No
VANCOUVER CMA	92.8%	92.4%	95.1%	2.7%	Yes
VANCOUVER 1	87.1%	95.2%	91.3%	-3.9%	Yes
VANCOUVER 2	96.2%	92.3%	100.0%	7.7%	Yes
VANCOUVER 3	94.3%	100.0%	93.3%	-6.7%	Yes
VANCOUVER 4	98.2%	50.0%	100.0%	50.0%	Yes

N/A indicates not applicable.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-11 – Weighted Retailer Sales Compliance under “Operation ID” by Class of Trade – 2005 – Grocery

Region	All Stores	% Unwilling to Sell (Compliant) - Stores that do not Participate in "Operation ID"	% Unwilling to Sell (Compliant) - Stores that Participate in "Operation ID"	Compliance Point Difference	Likely that Change is Statistically Significant (Yes/No)
NATIONAL	80.8%	80.9%	89.4%	8.5%	Yes
ST. JOHN'S (NL)	98.4%	100.0%	94.1%	-5.9%	Yes
CHARLOTTETOWN (PEI)	90.1%	100.0%	66.7%	-33.3%	Yes
NEW BRUNSWICK	84.1%	100.0%	83.5%	-16.5%	Yes
BATHURST	84.2%	100.0%	100.0%	0.0%	No
FREDERICTON	94.3%	100.0%	100.0%	0.0%	No
MONCTON	61.1%	100.0%	71.4%	-28.6%	Yes
SAINT JOHN	99.0%	100.0%	100.0%	0.0%	No
NOVA SCOTIA	84.5%	71.9%	88.5%	16.6%	Yes
HALIFAX	80.5%	57.1%	80.0%	22.9%	Yes
SYDNEY	92.5%	100.0%	100.0%	0.0%	No
QUEBEC	70.4%	73.3%	83.9%	10.6%	Yes
CHICOUTIMI					
JONQUIERE	90.7%	N/A	94.4%	N/A	N/A
MONTREAL	69.5%	76.7%	76.5%	-0.2%	No
QUEBEC CITY	68.3%	65.8%	83.3%	17.5%	Yes
SHERBROOKE	73.3%	69.2%	100.0%	30.8%	Yes
ONTARIO	77.1%	76.2%	92.6%	16.3%	Yes
KINGSTON	94.4%	100.0%	100.0%	0.0%	No
OTTAWA	91.0%	83.3%	90.9%	7.6%	Yes
ST. CATHARINES	86.5%	100.0%	100.0%	0.0%	No
SUDBURY	88.1%	100.0%	87.5%	-12.5%	Yes
THUNDER BAY	66.5%	N/A	100.0%	N/A	N/A
TORONTO	69.7%	72.3%	90.5%	18.2%	Yes
WINDSOR	94.2%	100.0%	100.0%	0.0%	No
MANITOBA	72.0%	84.2%	81.1%	-3.1%	Yes
BRANDON	77.2%	N/A	66.7%	N/A	N/A
WINNIPEG	71.6%	84.2%	85.7%	1.5%	No
SASKATCHEWAN	96.0%	91.6%	100.0%	8.4%	Yes
REGINA	92.9%	90.0%	N/A	N/A	N/A
SASKATOON	99.0%	93.3%	100.0%	6.7%	Yes
ALBERTA	84.7%	84.2%	88.8%	4.6%	Yes
CALGARY	90.3%	81.8%	91.2%	9.4%	Yes
EDMONTON	78.4%	83.3%	84.4%	1.0%	No
MEDICINE HAT	88.8%	100.0%	80.0%	-20.0%	Yes
RED DEER	78.3%	100.0%	100.0%	0.0%	No
BRITISH COLUMBIA	91.8%	95.9%	96.4%	0.5%	No
KELOWNA	94.1%	N/A	100.0%	N/A	N/A
CAMPBELL RIVER					
COURTENAY	78.5%	100.0%	100.0%	0.0%	No
VANCOUVER CMA	92.8%	95.3%	95.3%	0.0%	No
VANCOUVER 1	87.1%	95.0%	94.1%	-0.9%	No
VANCOUVER 2	96.2%	100.0%	100.0%	0.0%	No
VANCOUVER 3	94.3%	90.5%	90.0%	-0.5%	No
VANCOUVER 4	98.2%	100.0%	100.0%	0.0%	No

N/A indicates not applicable.

Vancouver 1: Vancouver, Richmond

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Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-12 – Weighted – Retailer Sales Compliance under “Operation ID” by Class of Trade – 2005 – Gas Stores/Kiosks

Region	All Stores	% Unwilling to Sell (Compliant) - Stores that do not Participate in "Operation ID"	% Unwilling to Sell (Compliant) - Stores that Participate in "Operation ID"	Compliance Point Difference	Likely that Change is Statistically Significant (Yes/No)
NATIONAL	80.8%	74.6%	85.6%	11.0%	Yes
ST. JOHN'S (NL)	98.4%	100.0%	96.4%	-3.6%	Yes
CHARLOTTETOWN (PEI)	90.1%	92.9%	90.0%	-2.9%	Yes
NEW BRUNSWICK	84.1%	82.3%	66.8%	-15.5%	Yes
BATHURST	84.2%	66.7%	100.0%	33.3%	Yes
FREDERICTON	94.3%	100.0%	92.9%	-7.1%	Yes
MONCTON	61.1%	66.7%	33.3%	-33.3%	Yes
SAINT JOHN	99.0%	100.0%	100.0%	0.0%	No
NOVA SCOTIA	84.5%	95.1%	74.4%	-20.7%	Yes
HALIFAX	80.5%	93.9%	71.0%	-23.0%	Yes
SYDNEY	92.5%	96.4%	87.5%	-8.9%	Yes
QUEBEC	70.4%	67.5%	86.7%	19.2%	Yes
CHICOUTIMI	90.7%	100.0%	90.3%	-9.7%	Yes
JONQUIERE	69.5%	68.9%	90.0%	21.1%	Yes
MONTREAL	68.3%	57.9%	83.3%	25.4%	Yes
QUEBEC CITY	73.3%	64.0%	75.0%	11.0%	Yes
SHERBROOKE	77.1%	70.6%	87.5%	16.9%	Yes
ONTARIO	94.4%	90.0%	100.0%	10.0%	Yes
KINGSTON	91.0%	81.0%	91.7%	10.7%	Yes
OTTAWA	86.5%	78.8%	87.0%	8.2%	Yes
ST. CATHARINES	88.1%	100.0%	80.6%	-19.4%	Yes
SADBURY	66.5%	31.3%	70.0%	38.8%	Yes
THUNDER BAY	69.7%	69.3%	85.2%	15.9%	Yes
TORONTO	94.2%	85.0%	95.5%	10.5%	Yes
WINDSOR	72.0%	60.5%	68.5%	8.1%	Yes
MANITOBA	77.2%	N/A	78.9%	N/A	N/A
BRANDON	71.6%	60.5%	65.5%	5.1%	Yes
WINNIPEG	96.0%	94.8%	100.0%	5.2%	Yes
SASKATCHEWAN	92.9%	91.9%	N/A	N/A	N/A
REGINA	99.0%	98.2%	100.0%	1.8%	No
SASKATOON	84.7%	64.6%	79.9%	15.3%	Yes
ALBERTA	90.3%	79.2%	84.3%	5.1%	Yes
CALGARY	78.4%	53.8%	69.2%	15.4%	Yes
EDMONTON	88.8%	87.5%	87.5%	0.0%	No
MEDICINE HAT	78.3%	75.0%	71.4%	-3.6%	Yes
RED DEER	91.8%	89.9%	90.7%	0.8%	No
BRITISH COLUMBIA	94.1%	80.0%	87.2%	7.2%	Yes
KELOWNA	78.5%	73.3%	71.4%	-1.9%	No
CAMPBELL RIVER	92.8%	92.1%	92.6%	0.4%	No
COURTENAY	87.1%	83.3%	82.1%	-1.2%	No
VANCOUVER CMA	96.2%	93.3%	100.0%	6.7%	Yes
VANCOUVER 1	94.3%	97.1%	93.3%	-3.7%	Yes
VANCOUVER 2	98.2%	93.8%	100.0%	6.3%	Yes
VANCOUVER 3					
VANCOUVER 4					

N/A indicates not applicable.

Vancouver 1: Vancouver, Richmond

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Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-13 – Weighted – Retailer Sales Compliance under “Operation ID” by Class of Trade – 2005 – Independent Convenience

Region	All Stores	% Unwilling to Sell (Compliant) - Stores that do not Participate in "Operation ID"	% Unwilling to Sell (Compliant) - Stores that Participate in "Operation ID"	Compliance Point Difference	Likely that Change is Statistically Significant (Yes/No)
NATIONAL	80.8%	72.9%	86.1%	13.1%	Yes
ST. JOHN'S (NL)	98.4%	100.0%	100.0%	0.0%	No
CHARLOTTETOWN (PEI)	90.1%	100.0%	90.5%	-9.5%	Yes
NEW BRUNSWICK	84.1%	95.9%	86.7%	-9.2%	Yes
BATHURST	84.2%	77.8%	100.0%	22.2%	Yes
FREDERICTON	94.3%	100.0%	90.7%	-9.3%	Yes
MONCTON	61.1%	100.0%	71.4%	-28.6%	Yes
SAINT JOHN	99.0%	100.0%	94.4%	-5.6%	Yes
NOVA SCOTIA	84.5%	84.4%	85.9%	1.5%	No
HALIFAX	80.5%	82.8%	84.0%	1.2%	No
SYDNEY	92.5%	87.3%	92.9%	5.6%	Yes
QUEBEC	70.4%	68.3%	70.9%	2.5%	Yes
CHICOUTIMI JONQUIERE	90.7%	N/A	85.9%	N/A	N/A
MONTREAL	69.5%	68.4%	60.0%	-8.4%	Yes
QUEBEC CITY	68.3%	62.3%	68.2%	5.9%	Yes
SHERBROOKE	73.3%	78.4%	90.0%	11.6%	Yes
ONTARIO	77.1%	64.4%	88.3%	23.8%	Yes
KINGSTON	94.4%	85.7%	91.3%	5.6%	Yes
OTTAWA	91.0%	100.0%	89.7%	-10.3%	Yes
ST. CATHARINES	86.5%	74.0%	100.0%	26.0%	Yes
SUDBURY	88.1%	75.0%	91.7%	16.7%	Yes
THUNDER BAY	66.5%	85.7%	91.7%	6.0%	Yes
TORONTO	69.7%	57.8%	78.6%	20.8%	Yes
WINDSOR	94.2%	96.7%	93.8%	-2.9%	Yes
MANITOBA	72.0%	53.6%	65.2%	11.7%	Yes
BRANDON	77.2%	N/A	37.5%	N/A	N/A
WINNIPEG	71.6%	53.6%	77.8%	24.2%	Yes
SASKATCHEWAN	96.0%	93.4%	100.0%	6.6%	Yes
REGINA	92.9%	86.2%	N/A	N/A	N/A
SASKATOON	99.0%	100.0%	100.0%	0.0%	No
ALBERTA	84.7%	76.2%	90.1%	13.9%	Yes
CALGARY	90.3%	87.5%	94.1%	6.6%	Yes
EDMONTON	78.4%	65.2%	87.5%	22.3%	Yes
MEDICINE HAT	88.8%	100.0%	83.3%	-16.7%	Yes
RED DEER	78.3%	100.0%	80.0%	-20.0%	Yes
BRITISH COLUMBIA	91.8%	89.6%	92.1%	2.5%	Yes
KELOWNA	94.1%	100.0%	100.0%	0.0%	No
CAMPBELL RIVER COURTENAY	78.5%	76.9%	70.0%	-6.9%	Yes
VANCOUVER CMA	92.8%	90.8%	93.5%	2.8%	Yes
VANCOUVER 1	87.1%	84.9%	85.0%	0.1%	No
VANCOUVER 2	96.2%	91.7%	97.1%	5.4%	Yes
VANCOUVER 3	94.3%	92.5%	91.7%	-0.8%	No
VANCOUVER 4	98.2%	100.0%	100.0%	0.0%	No

N/A indicates not applicable.

Vancouver 1: Vancouver, Richmond

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Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2005)

Table A-14 – Weighted – Retailer Sales Compliance under “Operation ID” by Class of Trade – 2005 – Pharmacy

Region	All Stores	% Unwilling to Sell (Compliant) - Stores that do not Participate in "Operation ID"	% Unwilling to Sell (Compliant) - Stores that Participate in "Operation ID"	Compliance Point Difference	Likely that Change is Statistically Significant (Yes/No)
NATIONAL	80.8%	89.5%	96.8%	7.3%	Yes
ST. JOHN'S (NL)	98.4%	100.0%	100.0%	0.0%	No
CHARLOTTETOWN (PEI)	90.1%	N/A	N/A	N/A	N/A
NEW BRUNSWICK	84.1%	N/A	N/A	N/A	N/A
BATHURST	84.2%	N/A	N/A	N/A	N/A
FREDERICTON	94.3%	N/A	N/A	N/A	N/A
MONCTON	61.1%	N/A	N/A	N/A	N/A
SAINT JOHN	99.0%	N/A	N/A	N/A	N/A
NOVA SCOTIA	84.5%	N/A	N/A	N/A	N/A
HALIFAX	80.5%	N/A	N/A	N/A	N/A
SYDNEY	92.5%	N/A	N/A	N/A	N/A
QUEBEC	70.4%	N/A	N/A	N/A	N/A
CHICOUTIMI					
JONQUIERE	90.7%	N/A	N/A	N/A	N/A
MONTREAL	69.5%	N/A	N/A	N/A	N/A
QUEBEC CITY	68.3%	N/A	N/A	N/A	N/A
SHERBROOKE	73.3%	N/A	N/A	N/A	N/A
ONTARIO	77.1%	N/A	N/A	N/A	N/A
KINGSTON	94.4%	N/A	N/A	N/A	N/A
OTTAWA	91.0%	N/A	N/A	N/A	N/A
ST. CATHARINES	86.5%	N/A	N/A	N/A	N/A
SUDBURY	88.1%	N/A	N/A	N/A	N/A
THUNDER BAY	66.5%	N/A	N/A	N/A	N/A
TORONTO	69.7%	N/A	N/A	N/A	N/A
WINDSOR	94.2%	N/A	N/A	N/A	N/A
MANITOBA	72.0%	75.0%	94.1%	19.1%	Yes
BRANDON	77.2%	N/A	100.0%	N/A	N/A
WINNIPEG	71.6%	75.0%	92.9%	17.9%	Yes
SASKATCHEWAN	96.0%	98.1%	100.0%	1.9%	No
REGINA	92.9%	96.0%	N/A	N/A	N/A
SASKATOON	99.0%	100.0%	100.0%	0.0%	No
ALBERTA	84.7%	94.3%	95.2%	0.8%	No
CALGARY	90.3%	100.0%	97.1%	-2.9%	Yes
EDMONTON	78.4%	90.3%	96.9%	6.6%	Yes
MEDICINE HAT	88.8%	100.0%	100.0%	0.0%	No
RED DEER	78.3%	100.0%	50.0%	-50.0%	Yes
BRITISH COLUMBIA	91.8%	86.0%	97.7%	11.8%	Yes
KELOWNA	94.1%	N/A	100.0%	N/A	N/A
CAMPBELL RIVER					
COURTENAY	78.5%	33.3%	100.0%	66.7%	Yes
VANCOUVER CMA	92.8%	88.3%	97.3%	9.0%	Yes
VANCOUVER 1	87.1%	84.2%	92.9%	8.6%	Yes
VANCOUVER 2	96.2%	90.0%	100.0%	10.0%	Yes
VANCOUVER 3	94.3%	90.0%	100.0%	10.0%	Yes
VANCOUVER 4	98.2%	100.0%	100.0%	0.0%	No

N/A indicates not applicable.

Vancouver 1: Vancouver, Richmond

Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster

Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock

Vancouver 4: North Vancouver, West Vancouver