Final Report of Findings: 2002

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

Prepared For:

Health Canada
Tobacco Control Programme
Healthy Environments & Consumer Safety Branch

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

This report has been prepared by ACNielsen, a VNU Company, for Health Canada. It presents findings from a survey of retailers' behaviour towards youth access-to-tobacco provisions contained in various federal and provincial tobacco laws. The information contained in this report consists primarily of estimates, representing ACNielsen's opinion, based on projections using a study design first developed in 1995 and modified for successive studies in conjunction with legislative changes and changes to study specifications requested by Health Canada.

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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. ACNielsen has been conducting independent measurements of retailer compliance with the sales-to-minors provisions of the laws since 1995.

Research teams consisting of one young Canadian (fifteen, sixteen or seventeen years of age) and one adult (over nineteen) were sent into tobacco-selling establishments across thirty cities in each of ten 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: grocery supermarkets, chain convenience, independent convenience stores, pharmacies and gas convenience chains/service stations. A total of 5,550 stores were visited. As much as possible, we attempted to keep the methodology the same as that used in previous surveys. However, this year's study was different from the last one conducted in 2000 in a few ways:

- The current study was conducted principally during the school summer recess, between July 1 and Labour Day, 2002. The timing of work thus began and ended earlier than that of the last research of this type, conducted in Fall 2000. The timing represents a return to the field schedule for studies from 1995 to 1999;
- Measurements related to *Operation ID*, an industry-sponsored awareness program, were added to the study for the first time this year.
- This year's national sample is larger and marginally different from that in preceding years. There are three reasons for this:
    - measurements were taken in five new cities in addition to the twenty-five core cities visited in the past;
    - for the first time, the Vancouver Census Metropolitan Area (CMA) was over-sampled to permit estimates for four health regions within the greater city area;
    - the requirement in previous studies that the Montreal CMA be over-sampled to permit compliance estimates for Montreal Island vs Laval was removed by the Project Authority.

The scope and methodology of this work has evolved over the years but maintain direct links to the study design developed by ACNielsen for the first tobacco retailer compliance audits conducted for Health Canada in 1995 and 1996. Despite a larger sample and more cities this year, youth were hired and deployed across the sample according to age and gender criteria similar to those first adopted in 1999. The core twenty-five cities that have been part of these surveys since the beginning remained intact, and the distribution of the sample in these cities by trade class, and age and gender of minors was held as consistent as possible within the limits of a changing marketplace. Observations relating to Operation ID are new, but all other measurements for this year's survey were collected and recorded in the same way as always. All of which permits the results of the current survey to be reliably compared, with appropriate cautions for slight variations in methodology, to results of surveys conducted since 1995.

KEY FINDINGS

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

Nationally, the percentage of retailers refusing to sell cigarettes to underage Canadians has surpassed seventy percent for the first time since ACNielsen began taking measurements in 1995. The current level stands at 71.2%. The figure is weighted (i.e., raw data has been extrapolated to reflect conditions we might have found had all stores in Canada been visited instead of just a sample of stores). The result is accurate +/- 1.2, 19 times out of 20 at the 95% confidence level. Compared with the previous reading in 2000 (69.8%), this year's figure is mildly better, but remains nine points below the eighty percent established by the Federal Tobacco Control Strategy as goal to be reached over the next few years.

This year's results show that the gains of the last several years have been consolidated, most significantly by the fact that retailers appear less influenced today than at any other time by several key variables that historically have impacted negatively on their refusal to sell. Other developments reveal that the broader objective of eighty percent compliance is not so far from reach as the current national gap suggests:

- the influence of teen gender on retailer behaviour appears to be waning. Underage girls are still more likely than underage boys to be refused a sale, but the rate of refusal when boys are involved is rising. The gap involving the genders has narrowed steadily over the last five years and is presently the lowest it has been since 1997;
- clerks who are teenagers remain the most likely to sell tobacco to their underage peers, but compliance rates for this group continue to improve and are now higher than in the past. Sales refusal rates among clerks who are seniors have also risen to a level above the national rate of compliance for the first time since at least 1998;
- teens are more likely to be refused a sale by clerks who are women, than by clerks who are men, but the rate of refusal involving male clerks is holding at the same time that the rate of refusal involving female clerks continues to improve;
- retailers' sensitivity to the issue of tobacco sales to minors appears to have reached a point where more retailers are ready to reject a tobacco sale to young Canadians outright, without even asking for ID. This year, a higher percentage of retailers chose not to ask for ID but refused to sell anyway. Among those asking for ID, the overwhelming majority of retailers refused to sell;
- the age of minors continues to affect retailer refusals to sell cigarettes, with youngest teens typically having a harder time purchasing cigarettes than older ones. This year, the retailer refusal rate when fifteen year olds were involved jumped back above eighty percent, at the same time that previous levels held when sixteen and seventeen year olds attempted to buy;

- across retail trade classes, tobacco vendors in pharmacies, grocery supermarkets and chain convenience stores already post tobacco sales-to-minors compliance levels very near to or above eighty percent. Overall compliance was weighted lower by weaker rates in independent stores and gas outlets;
- despite national compliance around seventy percent, retailer refusal rates this year were above the national average and actually improved across stores in the great majority of cities we visited. In fact, eighteen of thirty cities measured (i.e., 60% of cities) reported compliance of eighty percent or better, and three others reported compliance between 75%-80%. This year, for the first time, no community reported compliance below fifty percent.

The gains made regionally extend across the breadth of Canada. Cities in eight of the ten provinces reported compliance increases, and at least half of the core cities visited in every province except PEI and Manitoba did so. What prevented the overall weighted national rate of compliance from going higher this year was below-average performance by retailers in a handful of Canada's largest cities.

The highest overall percentage of retailers refusing to sell tobacco to minors was in these cities. All reported levels above eighty percent:

- Kelowna 100.0%
- Moncton 98.5%
- St. John's, NFLD 98.2%
- Windsor 97.9%
- Campbell River/Courtnay 97.6%
- Ottawa 97.6%
- Thunder Bay 96.2%
- Regina 95.2%
- Calgary 95.0%
- Saskatoon 91.9%
- Medicine Hat 89.9%
- Kingston 88.7%
- Sherbrooke 87.1%
- Sydney 86.1%
- Fredericton 84.9%
- Brandon 84.9%
- Red Deer 81.3%
- Chicoutimi/Jonquiere 80.4%

For Regina and Saskatoon, the high scores are not unusual, but the figures are the highest either city has recorded. Measurements here are the first since the introduction in Saskatchewan of new provincial controls on tobacco sales and merchandising at point-of-sale. The results are good enough for Saskatchewan to have recorded the highest rate of compliance of any province where at least two cities were visited.

The five cities included in our sample for the first time this year contributed positively to the overall national average. Each of these cities reported compliance above the national average, with most reporting levels well above eighty percent.

The lowest overall percentage of retailers refusing to sell tobacco to minors was in four communities. All reported compliance estimates below sixty percent.

- Halifax 54.1%
- Montreal 54.2%
- Quebec City 58.4%
- Bathurst 59.1%

Quebec continues to report the lowest rate of provincial compliance overall (57.0%), but this represents an improvement over the level in 2000 (47.0%)

The findings along other variables we looked at either had no measurable effect on retailer behaviour or could not be linked conclusively to the nature of their actions. Such variables include store location near or away from schools or malls, the presence of adults in store at the time of the attempted purchase, the time of day and the presence or not of "Operation ID" signs.

Measurements in 2001 were the first taken since the inauguration of "Operation ID". We found just over half the retailers we visited (54.5%) supported the program based on presence of signs in-store. Retailer support was found to some degree in all but one of the cities we visited (Moncton being the sole exception). In Saskatchewan, where the newly adopted *Tobacco Control Act* prohibits the presence of non-authorized tobacco signs, a small percentage of retailers in both Regina and Saskatoon (11% and 16% respectively) had program materials on their premises in violation of the law.

Nationally, retailers supporting "Operation ID" did register refusal rates that were substantially better than those posted by program none participants. Participating retailers registered compliance of 74.7% compared with 66.9% for non-participating retailers. Higher rates of compliance were also recorded for national participants based on the age of teens and proximity to schools or malls, as well as by participants in independent convenience and gas stores. The respective levels of compliance in each group correlated directly with the percentage of retailers asking for ID.

Yet for many reasons, "Operation ID"'s influence on retailer tobacco sales to minors remains inconclusive:

- better compliance within participating independent convenience and gas stores did not contribute to overall compliance in these stores being higher this year than in previous years, before "Operation ID" was in place;
- while participating retailers were more likely than non-participating ones to ask older teens for ID and refuse a sale if none was shown, refusal rates among participating retailers still varied inversely with age;
- in individual cities where results could be measured, the findings varied substantially. About half the cities showed favorable results, and half unfavorable ones. In many cities, differences were too small to even measure.

Table A - Weighted - Sales To Minors Compliance Results By City/Province/Region – 2002

	% Unwilling to Sell (Compliant)	% Willing to Sell (Non-Compliant)	% Who Asked for ID	% Who Asked for ID & Did Not Sell	% Who Asked for ID but Willing to Sell	% Who Did Not Ask for ID and Willing to Sell
NATIONAL	71.2	28.8	69.9	96.0	4.0	86.4
NATIONAL CORE 25	70.3	29.7	68.9	95.9	4.1	86.4
ST. JOHN'S	98.2	1.8	96.3	99.0	1.0	24.7
CHARLOTTETOWN	75.6	24.4	80.4	92.5	7.5	93.5
NEW BRUNSWICK	81.6	18.4	78.3	98.6	1.4	80.0
NEW BRUNSWICK CORE	73.1	26.9	68.2	98.8	1.2	81.8
BATHURST	59.1	40.9	56.2	100.0	NA	93.3
FREDERICTON	84.9	15.1	80.8	100.0	NA	78.6
MONCTON	98.5	1.5	98.6	98.5	1.5	NA
SAINT JOHN	73.1	26.9	66.3	97.1	2.9	74.3
NOVA SCOTIA	63.8	36.2	64.9	95.9	4.1	95.4
HALIFAX	54.1	45.9	56.3	93.9	6.1	97.2
SYDNEY	86.1	13.9	84.4	99.1	0.9	84.2
QUEBEC	57.0	43.0	54.5	97.8	2.2	91.7
CHIC/JONQUIERE	80.4	19.6	81.0	95.7	4.3	85.1
MONTREAL	54.2	45.8	51.4	97.3	2.7	91.5
QUEBEC CITY	58.4	41.6	56.6	99.4	0.6	95.1
SHERBROOKE	87.1	12.9	82.3	100.0	NA	72.9
ONTARIO	74.8	25.2	73.3	93.4	6.6	76.5
ONTARIO CORE	73.6	26.4	71.8	93.0	7.0	75.7
KINGSTON	88.7	11.3	82.2	96.6	3.4	47.6
OTTAWA	97.6	2.4	94.1	99.3	0.7	29.9
ST. CATHARINES	77.1	22.9	81.1	94.4	5.6	97.4
SUDBURY	66.7	33.3	70.5	93.5	6.5	97.2
THUNDER BAY	96.2	3.8	94.3	100.0	NA	67.1
TORONTO	67.8	32.2	66.0	90.7	9.3	76.6
WINDSOR	97.9	2.1	97.0	99.2	0.8	44.0
MANITOBA	65.2	34.8	67.0	94.9	5.1	94.9
BRANDON	84.9	15.1	85.8	94.3	5.7	71.7
WINNIPEG	63.6	36.4	65.4	94.9	5.1	95.7
SASKATCHEWAN	93.4	6.6	92.4	98.4	1.6	66.6
REGINA	95.2	4.8	95.4	99.2	0.8	88.6
SASKATOON	91.9	8.1	89.8	97.6	2.4	57.8
ALBERTA	87.0	13.0	86.2	98.1	1.9	81.8
ALBERTA CORE	87.3	12.7	86.4	98.0	2.0	80.7
CALGARY	95.0	5.0	92.2	99.6	0.4	60.1
EDMONTON	79.6	20.4	80.7	96.0	4.0	88.9
MEDICINE HAT	89.9	10.1	87.3	100.0	NA	79.2
RED DEER	81.3	18.7	81.3	100.0	NA	100.0
BRITISH COLUMBIA	69.3	30.7	69.4	97.3	2.7	94.1
KELOWNA	100.0	NA	100.0	100.0	NA	NA
CAMPBELL RIVER/COURTNAY	97.6	2.4	92.7	100.0	NA	33.3
VANCOUVER CMA	65.5	34.5	65.8	96.8	3.2	94.8
VANCOUVER 1	62.2	37.8	62.5	96.9	3.1	95.7
VANCOUVER 2	63.8	36.2	64.1	97.6	2.4	96.7
VANCOUVER 3	71.3	28.7	71.3	96.3	3.7	91.0
VANCOUVER 4	72.3	27.7	73.7	95.1	4.9	91.4

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

Table B - % Retailers Refusing To Sell By Region
Trended Results (Weighted)*

	1995 Results	1996 Results	1997 Results	1998 Results	1999 Results	2000 Results	2002 Results
NATIONAL							71.2
NATIONAL CORE 25	47.9	60.5	67.3	61.0	69.7	69.8	70.3
ST. JOHN'S	33.2	58.4	83.4	79.6	52.4	87.8	98.2
CHARLOTTETOWN	90.4	34.3	72.9	77.9	86.0	86.0	75.6
NEW BRUNSWICK							81.6
NEW BRUNSWICK CORE	88.8	84.8	58.0	40.7	42.1	72.7	73.1
BATHURST	8.3	38.7	60.0	22.6	60.3	95.4	59.1
FREDRICTON	99.9	89.5	49.3	39.8	30.2	79.9	84.9
MONCTON	NA	NA	NA	NA	NA	NA	98.5
SAINT JOHN	94.2	87.6	61.5	42.7	45.9	67.1	73.1
NOVA SCOTIA	75.5	89.8	64.1	69.3	73.3	70.9	63.8
HALIFAX	NA	NA	57.4	62.2	84.5	76.8	54.1
SYDNEY	96.8	98.1	80.5	86.5	45.3	52.2	86.1
QUEBEC	23.9	28.8	45.4	48.7	65.2	47.0	57.0
CHICOUTIMI/JONQUIRE	16.0	14.3	49.0	47.9	72.2	64.5	80.4
MONTREAL	27.7	27.9	45.4	62.0	69.3	63.2	54.2
QUEBEC CITY	9.1	33.8	44.8	25.1	57.3	18.5	58.4
SHERBROOKE	32.7	45.9	45.0	47.5	69.4	41.1	87.1
ONTARIO							74.8
ONTARIO CORE	62.2	73.3	69.4	62.0	79.1	83.7	73.6
KINGSTON	NA	NA	NA	NA	NA	NA	88.7
OTTAWA	40.1	46.5	72.1	55.5	84.3	68.6	97.6
ST. CATHARINES	NA	NA	NA	NA	NA	NA	77.1
SUDBURY	74.2	61.1	80.2	79.7	84.1	59.6	66.7
TORONTO	68.6	77.3	67.9	62.4	78.5	87.5	67.8
THUNDER BAY	NA	NA	NA	NA	NA	NA	96.2
WINDSOR	63.1	93.2	86.5	63.0	73.0	60.0	97.9
MANITOBA	56.5	76.8	72.1	67.7	83.7	78.9	65.2
BRANDON	61.0	69.3	47.2	79.8	92.6	84.5	84.9
WINNIPEG	56.4	76.9	72.3	67.5	83.6	78.8	63.6
SASKATCHEWAN	30.1	77.8	66.9	73.8	78.9	81.4	93.4
REGINA	NA	NA	58.6	72.5	70.7	80.1	95.2
SASKATOON	NA	NA	74.6	75.2	85.9	82.6	91.9
ALBERTA							87.0
ALBERTA CORE	60.1	68.6	80.3	75.4	73.6	67.3	87.3
CALGARY	42.1	55.9	82.6	82.6	63.2	63.0	95.0
EDMONTON	75.4	78.7	78.1	68.2	85.4	71.7	79.6
MEDICINE HAT	95.6	93.4	69.4	62.5	6.6	95.6	89.9
RED DEER	NA	NA	NA	NA	NA	NA	81.3
BRITISH COLUMBIA	69.2	74.0	77.7	60.3	59.3	75.3	69.3
KELOWNA	53.2	53.6	82.9	87.6	98.2	63.8	100.0
CAMPBELL RIVER/COURTNAY	100.0	100.0	94.5	86.8	98.2	85.1	97.6
VANCOUVER CMA	69.1	74.0	77.5	59.6	58.2	75.4	65.5
VANCOUVER 1	NA	NA	NA	NA	NA	NA	62.2
VANCOUVER 2	NA	NA	NA	NA	NA	NA	63.8
VANCOUVER 3	NA	NA	NA	NA	NA	NA	71.3
VANCOUVER 4	NA	NA	NA	NA	NA	NA	72.3

**Historical trends based on similar, but not identical, methodologies and city samples. View comparisons with appropriate caution.*

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

Table C - Weighted - Sales To Minors Compliance Results By City/Province/Region Based on Retailer Participation in Operation ID

	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	Likley That Change Is Statistically Significant (Yes/No)
NATIONAL	71.2	66.9	74.7	7.8	YES
NATIONAL CORE 25	70.3	66.3	73.7	7.4	YES
ST. JOHN'S	98.2	100.0	98.1	-1.9	YES
CHARLOTTETOWN	75.6	74.9	76.2	1.3	NO
NEW BRUNSWICK	81.6	64.2	87.6	23.4	YES
NEW BRUNSWICK CORE	73.1	64.2	78.7	14.5	YES
BATHURST	59.1	60.2	50.0	-10.2	NO
FREDERICTON	84.9	100.0	84.7	-15.3	YES
MONCTON	98.5	NA	98.5	NA	NA
SAINT JOHN	73.1	69.4	75.0	5.6	YES
NOVA SCOTIA	63.8	61.7	66.4	4.7	YES
HALIFAX	54.1	56.4	50.0	-6.4	YES
SYDNEY	86.1	85.1	86.5	1.4	NO
QUEBEC	57.0	49.8	60.9	11.1	YES
CHIC/JONQUIERE	80.4	85.5	77.8	-7.7	YES
MONTREAL	54.2	44.0	59.0	15.0	YES
QUEBEC CITY	58.4	44.7	65.5	20.8	YES
SHERBROOKE	87.1	87.7	75.0	-12.7	NO
ONTARIO	74.8	65.8	82.7	16.9	YES
ONTARIO CORE	73.6	64.2	82.0	17.8	YES
KINGSTON	88.7	88.0	89.8	1.8	NO
OTTAWA	97.6	94.4	98.6	4.2	NO
ST. CATHARINES	77.1	74.3	80.4	6.1	NO
SUDBURY	66.7	61.3	71.8	10.5	YES
THUNDER BAY	96.2	100.0	96.2	-3.8	YES
TORONTO	67.8	61.8	74.9	13.1	YES
WINDSOR	97.9	81.7	99.2	17.5	NO
MANITOBA	65.2	64.7	65.8	1.1	NO
BRANDON	84.9	82.6	87.3	4.7	NO
WINNIPEG	63.6	63.2	64.0	0.8	NO
SASKATCHEWAN	93.4	93.6	92.4	-1.2	NO
REGINA	95.2	94.6	100.0	5.4	YES
SASKATOON	91.9	92.7	88.0	-4.7	NO
ALBERTA	87.0	87.9	86.2	-1.7	NO
ALBERTA CORE	87.3	88.1	86.5	-1.6	NO
CALGARY	95.0	96.2	93.9	-2.3	NO
EDMONTON	79.6	79.7	79.5	-0.2	NO
MEDICINE HAT	89.9	96.0	77.7	-18.3	YES
RED DEER	81.3	77.8	82.3	4.5	NO
BRITISH COLUMBIA	69.3	67.7	71.2	3.5	NO
KELOWNA	100.0	100.0	100.0	0.0	NO
CAMPBELL RIVER/COURTNAY	97.6	95.4	100.0	4.6	YES
VANCOUVER CMA	65.5	66.5	64.0	-2.5	NO
VANCOUVER 1	62.2	63.4	60.4	-3.0	NO
VANCOUVER 2	63.8	69.3	55.6	-13.7	YES
VANCOUVER 3	71.3	66.0	79.0	13.0	YES
VANCOUVER 4	72.3	75.9	66.0	-9.9	YES

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

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 44.0%. The rate is lower than what we measured in 2000 (47.5%) and represents the first decline after four consecutive years of improvements.

Lower sign compliance rates nationally stem from decreases in thirteen of twenty-five core cities against which this year's findings can be compared to those of 2000. The largest and most significant declines were in seven cities:

- Medicine Hat (-39.4 points)
- Saskatoon (-38.3 points)
- Ottawa (-36.9 points)
- Sudbury (-25.5 points)
- Halifax (-19.8 points)
- Saint John (-14.7 points)
- Vancouver (-12.5 points)

These communities represent several provinces and are legislated under a variety of tobacco laws. The great majority of retailers in these cities did comply with the sign provisions of their respective province at least in part, as indeed was the case for retailers in virtually every other city we visited. As in past years, the data confirm that the majority of retailers in most cities had at least one mandated age advisory sign posted in all locations required by law. The reason sign compliance is not higher than it is is due to fewer than half of all retailers carrying all the signs proscribed by law in the manner proscribed.

There were cities where retailer compliance with the posting provisions of the tobacco laws improved over levels in 2000. Increases were reported in twelve cities, but especially in these six:

- Sherbrooke (+52.2 points)
- St. John's (+51.2 points)
- Bathurst (+28.4 points)
- Calgary (+21.9 points)
- Quebec City (+12.4 points)
- Sydney (+10.6 points)

The table below records the cities with highest and lowest levels of retailer compliance with the sign provisions of the tobacco laws: Highest compliance was in seven cities where the percentage of stores in full compliance was eighty-five or better:

Table D – Sign Compliance – Weighted
Cities Reporting Highest and Lowest Retailer Compliance 2002

Cities Reporting Highest Sign Compliance (80% or Better)		Cities Reporting Lowest Sign Compliance (Below National Average)	
• Charlottetown	100.0%	• Toronto	2.8%
• St. John's	95.9%	• Chicoutimi/Jonquiere	11.9%
• Moncton	95.4%	• Sudbury	17.2%
• Sherbrooke	92.9%	• Medicine Hat	22.9%
• Fredericton	90.4%	• St. Catharines	25.6%
• Kelowna	88.7%	• Ottawa	26.3%
• Red Deer	85.7%	• Halifax	31.7%
		• Saskatoon	41.1%

Saskatoon makes the list of cities where compliance is low. Under the new tobacco law in the province of Saskatchewan, retailers in that province must post only the age advisory signs permitted by law, and no other tobacco-related signs. The province requires two provincial age restriction signs be posted and accepts that the federal sign can also be present. In Saskatoon, a good number of retailers posted at least one of the required signs, but many also carried signs that are not permitted by law. The same occurred in Regina, where full compliance with the law is not much higher than in Saskatoon (48.6%). The only thing excluding Regina from the list of poorest performing cities is its overall rate above the national average.

Sign compliance levels improved in grocery stores over 2000 levels, but dropped in independent convenience stores, where full compliance was lower than in any other retail class of trade (38.9%). Nationally across trade classes, highest compliance with the sign laws was reported in pharmacies (67.5%).

Table E - (Weighted)
Retailer Compliance with Mandatory Sign Provisions – 2002

How To Interpret This Table

The figures in each column other than that labeled *Full Compliance*, show the percentage of retailers properly posting only the one indicated type of sign referred to at the top of the column. The figures in the column labeled *Full Compliance* indicate those retailers properly posting every required sign in the region shown and, in the case of the national figure, across all regions in the country. Percentages on the same line can be different,

Region	Age restriction sign at all required Locations	Door decal indicating legal age of 19	Health warning sign	Sign indicating legal age and photo ID required	"No Smoking" sign	"Tobacco can kill you" sign	"Tobacco Restricted" sticker	Other non-authorized siigns **Not** Present (Sask only)	% Stores with signs in both languages	Full Compliance	Sign saying "You may smoke here"
National	57.5									44.0	
National (Core 25 cities)	55.4									43.4	
St. John's, NFLD	95.9									95.9	
Charlottetown, PEI		100.0		100.0						100.0	
New Brunswick			95.6	87.2		87.0				78.3	
New Brunswick (core)			94.5	80.8		82.4				69.7	
Bathurst			91.8	80.7		77.2				71.9	
Fredricton			98.6	97.3		94.5				90.4	
Moncton			97.7	100.0		96.2				95.4	
Saint John			93.3	69.2		76.9				53.8	
Nova Scotia		90.1		71.2			82.4			36.2	
Halifax		88.9		63.2			80.1			31.7	
Sydney		92.7		89.6			87.8			46.4	
Quebec	56.4								56.4	53.9	
Chic./Jonquiere	11.9								34.8	11.9	
Total Montreal	54.8								56.3	54.7	
Quebec City	65.2								54.5	51.4	
Sherbrooke	92.9								92.9	92.9	
Ontario	80.3			78.3	17.3					15.3	2.4
Ontario (core)	78.7			77.0	12.1					10.9	0.6
Kingston	88.7			88.8	94.5					76.2	2.5
Ottawa	85.5			87.5	29.3					26.3	0.2
St. Catharines	88.6			85.9	29.4					25.6	19.2
Sudbury	69.2			68.8	24.8					17.2	0.8
Thunder Bay	99.3			88.8	88.7					78.2	10.7
Toronto	76.3			73.8	3.4					2.8	0.7
Windsor	98.4			97.1	77.2					74.3	0.0
Manitoba	50.1								56.3	49.8	
Brandon	66.5								62.9	62.9	
Winnipeg	48.7								48.7	48.7	
Saskatchewan	73.8			58.7				86.3		44.6	
Regina	83.8			63.6				89.3		48.6	
Saskatoon	64.9			54.3				83.7		41.1	
Alberta	78.3								76.3	74.5	
Alberta (core)	77.8								75.9	74.0	
Calgary	81.9								81.6	78.8	
Edmonton	74.9								75.3	74.2	
Medicine Hat	66.3								22.9	22.9	
Red Deer	88.5								85.7	85.7	
British Columbia			77.0	77.8						64.0	
Kelowna			93.8	90.5						88.7	
Campbell River/Courtnay			76.9	82.8						66.4	
Vancouver CMA			75.7	76.5						61.9	
Vancouver 1			71.4	74.9						59.3	
Vancouver 2			76.2	79.8						63.6	
Vancouver 3			82.9	76.9						66.0	
Vancouver 4			78.2	75.7						60.3	

because they mean different things, and do not indicate an error.

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

3. Retail Advertising At Point-Of-Sale (Table F)

In a manner consistent with past surveys, ACNielsen this year collected information on tobacco point-of-sale (POS) advertising permitted under the *Tobacco Act*. In addition, for the first time this year, we monitored compliance in Saskatchewan under the provisions of that province's *Tobacco Control Act*. The act expressly prohibits the display of any tobacco or tobacco-related product or promotional materials on the premises of stores where young persons are permitted to enter.

The information summarized in this section was collected based on the presence in-store strictly of advertising bearing printed trademarks, logos or brand names belonging to tobacco companies. Sponsored event ads void of such trademarks, logos or brand names are excluded from the calculations. So, too, except in Saskatchewan, are observations linked to tobacco product facings at point-of-sale, including facings that are part of prefabricated elements of the tobacco power wall.

A third of stores nationally (32.7%) continue to carry tobacco-related merchandising materials at point-of-sale. In absolute terms, this distribution figure is the lowest recorded since we first began to take measurements in 1996. Statistically, however, the figure is not measurably different from the level in 2000 (35.2%).

Counter-top displays represent the most popular form of tobacco advertising at point of sale. Nationally, counter-displays were found in more than 28.0% of stores and accounted for eighty percent of all ads. Shelf-talkers made up another ten percent of ads and were available in only three percent of stores. Since the last measurement in 2000, tobacco-related posters and merchandise (eg: clocks, calendars) have virtually disappeared from store premises.

Smaller-surface retail stores were more likely than larger surface stores to carry tobacco POS merchandising materials. More than half (57.6%) of convenience chains nationally carried POS advertising, along with a third of gas stations/kiosks (34.1%) and a third of independent convenience stores (33.0%).

The location of stores near or away from schools or malls made no meaningful difference to the presence of tobacco POS advertising.

Retailers in the Atlantic Region, Ontario, Saskatchewan, Manitoba and BC were the least likely to have ads; those in Quebec and Alberta the most likely.

In Saskatchewan, we found no tobacco-branded POS ads at all in any of the stores visited in either Regina or Saskatoon. This is consistent with the requirement of the law in that province. However, there were a handful of retailers in each city (8% and 7%, respectively) found in violation of that part of the law that requires tobacco product to be hidden from the view of customers in stores where young people are allowed to shop. Despite these instances, compliance was near or above ninety percent in all trade classes in both cities.

Among stores with ads, the average number of tobacco POS ad pieces carried was 1.7 pieces per store.

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 2000:

Table F – Weighted- All Stores Changes in POS* Ad Distribution Across Regions – 2002 vs 2000 Results			
% of Stores With Ads			
Cities Where Tobacco Ad Distribution Weakest This Year	2000	2002	Diff 2002 vs 2000
• Charlottetown	0.0	0.0	0.0
• Bathurst	1.5	0.0	(1.5)
• Moncton	NA	0.0	-
• Halifax	10.6	0.0	(10.6)
• Sydney	25.0	0.0	(25.0)
• Regina	34.4	0.0	(34.4)
• Saskatoon	50.7	0.0	(50.7)
• Kelowna	0.0	0.0	0.0
• Saint John, NB	39.6	1.9	(37.7)
• Fredericton	34.1	2.7	(31.4)
• Brandon	46.7	8.0	(38.7)
Cities Where Tobacco Ad Distribution Is Highest	2000	2002	Diff 2002 vs 2000
• Quebec City	72.3	66.7	(5.6)
• Sherbrooke	23.9	62.9	39.0
• Windsor	54.6	58.0	3.4
• Montreal	51.4	53.8	2.4
• Red Deer	NA	50.8	NA
• Chicoutimi/Jonquiere	20.9	48.4	27.5
• Calgary	50.6	42.6	(8.0)
• Edmonton	57.6	40.7	(16.9)
• Winnipeg	41.0	33.3	(7.7)
• Sudbury	6.8	31.2	24.4
• Ottawa	46.6	30.3	(16.3)
• Medicine Hat	35.6	29.9	(5.7)

** Point-of-Sale*

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

- Nationally, no single brand had ads in more than forty percent of these stores. The brand with the greatest distribution was “du Maurier”, with ads available in 39.8% of chain convenience stores. Ads for this brand also had highest distribution in independent convenience and gas stores (17.6% and 21.4% distribution in these stores, respectively);
- The share of ads enjoyed by tobacco brands across cities and trade classes coincided closely with the percent of stores carrying each brand;
- Within each store type, stores with ads carried fewer than two ads, on average, per store. Gas station stores with ads carried fewest ads (1.5 ads on average). Chain convenience stores with ads carried the most ads (1.8 ads on average);
- Counter-top displays were the predominant advertising vehicle in all three channels of trade--- these accounted for more than eighty percent of all ads in chain and independent convenience stores and just under eighty percent of all ads in gas stores. In all stores, counter-top displays were the leading ad vehicle for the most advertised brands.

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 embodied in Canada's tobacco laws. Health Canada has been using independent researchers since 1995 to evaluate retailer behaviour towards youth access restrictions of the federal and provincial tobacco laws. This year's study represents the resumption of national evaluations at point-of-sale, last conducted in the fall of 2000.

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 eighteen and provides for defense 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 eighteen. Indeed, except for Quebec, Manitoba, Alberta and Saskatchewan, retailers in all other provinces are restricted by local law from selling tobacco products to anyone below nineteen 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 some time before. Observers in these three provinces were instructed to monitor retailer compliance consistent with the age and sign provisions of the federal *Tobacco Act*.

As much as possible, this year's study was designed to permit comparisons with similar data collected in past years. However, some differences exist:

- This study was conducted principally during the school summer recess, between July 1 and Labour Day, 2002. The timing of work thus began and ended earlier than that of the last research of this type, conducted in Fall 2000. The timing is largely consistent with that of research conducted between 1995 and 1999;
- This was the first survey year that Operation ID, an industry-sponsored program, was in effect across the country and measurements of display materials related to the program were added for the first time this year;
- This year's national sample is larger and marginally different from that in preceding years in the following ways:
    - Measurements were taken in thirty cities compared with twenty-five cities in the past. The core twenty-five cities continued to be represented, but five new cities were added to expand the geographic coverage. Consequently, this year's national sample is larger than that of earlier years;

- The sample within the Vancouver CMA was expanded from that of past years to allow for statistically reliable measurements of compliance across the whole city and separately for each of four designated health regions within the greater Vancouver area;
- In past surveys, the Montreal Census Metropolitan Area (CMA) was purposely over-sampled to allow for statistically reliable reporting of results for Montreal Island versus Laval. Health Canada decided this split was no longer necessary.

These differences being noted, the bulk of this year's fieldwork was organized, executed and recorded in the same way as for previous surveys. This ensures that the current data 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 next ten 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;
3. To determine the presence in-store 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 law;
   - number and percent of retailers posting each of these signs in the proper manner and location prescribed by law;

- number and percent of retailers in partial or complete non-compliance with the sign posting provisions of applicable federal or provincial laws, 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;

   - in convenience stores (both chains and independents) and gas bars/stations, 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 ACNielsen observers, one a minor (fifteen, sixteen or seventeen years of age) and the other an adult over nineteen years of age, were sent into a randomly selected sample of 5,550 retail establishments in thirty cities and towns across Canada. Stores were visited over twelve weeks from July 2, 2002 to September 13, 2002.

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 twenty-five 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 eighteen or nineteen 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;
- 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;

- that approximately half of all store visits were completed by a minor seventeen years of age, with the rest of the sample being divided about equally between fifteen and sixteen 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. In the case of core cities, the distributions were assigned to match the criteria used in the last study of this type, in 2000. For the five new cities added to the study this year, age/gender criteria were established so as to best respect the quota requirements nationally and, as much as possible, to respect the same quotas within a particular province or region.

Table *i* confirms national completion rates by age and gender of teen researchers for the current study and preceding ones to 1998.

Table i – National Sample Dispersion By Age Gender of Teen Researchers

	1998	1999	2000	2002
Sample Size (# Stores Visits)	5,023	5,023	5,024	5, 550
Male	50.7%	49.8%	49.6%	49.4%
Female	49.3%	50.2%	50.4%	50.6%
15 Year Olds	23.4%	23.4%	23.6%	23.7%
16 year Olds	28.8%	28.7%	29.0%	29.3%
17 year Olds	47.8%	47.9%	47.4%	46.9%

Scope

Retail stores in thirty urban markets were visited. The list contains twenty-five cities that have been visited consistently since 1997, and that we refer in places throughout this report as the "core" cities. Five new cities were added to the study for the first time this year. These are: Moncton, Kingston, St. Catharines, Thunder Bay and Red Deer. These were added to increase the geographic scope of the study.

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:

- Grocery supermarket banners
- Chain convenience stores
- Independent convenience outlets
- Gas convenience/service stations
- Pharmacies

Sample selection in this, as in previous years, was guided by defined statistical procedures. These procedures were used to select first-time samples in the five new cities added to this years' survey:

- For each city and for each trade class, the sample frame was organized by banner where appropriate and in a geographic serpentine pattern 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;
- In cities in provinces where pharmacies were prohibited by law from selling cigarettes, pharmacies were excluded from the sample frame.

In the twenty-five core cities, our sampling objective was to match sample distributions by city and class of trade as closely as possible to those established in 2000. This was so as to provide continuity with the results from previous surveys. In Montreal and Vancouver--- both included in past surveys--- we were asked by the Project Authority to modify the sample specifications as follows, without detrimentally affecting trends at the level of the total CMA:

- Within the Montreal CMA, it was decided not to separate results from Montreal Island from those of Laval as we had done for the past several years. As such, it was no longer necessary to over-sample in this market, and the overall sample size was reduced from that in past surveys;
- In 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, and the sample size for this metropolitan area is significantly larger than in the past.
- The four health regions within the greater Vancouver area were defined by the boundaries of communities as follows:

<u>Region 1</u>	<u>Region 2</u>	<u>Region 3</u>	<u>Region 4</u>
Vancouver	Burnaby	Delta	North Vancouver
Richmond	Coquitlam	Surrey	West Vancouver
	Port Moody	Langley	
	Port Coquitlam	North delta	
	Maple Ridge	White Rock	
	Whonnock		
	Pit Meadows		
	New Westminster		

In these sub-regions of Vancouver, the sampling protocol for first-time cities was used to organize and draw the sample.

Once fieldwork began, some selected sample stores were found to have closed or to no longer be selling tobacco products. In these cases, ACNielsen staff replaced the stores with other retail establishments of the same type located in close proximity to the original outlet(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 5,550 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 completed visits and how this compares against the targets in each city.

Sample Weighting

Raw level data from our sample stores has been weighted statistically to reflect the distribution of total stores in the universe within the thirty communities. Weighted data is an estimate of conditions we likely would have found had we visited every retail outlet in the thirty cities instead of just the stores 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 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 seven surveys since 1995;
- to learn from the national results what variables motivate retailer behaviour;
- to consider ways to apply these lessons in the provinces.

As long as the data is reviewed objectively, the insights gleaned will have value.

Table ii - ACNielsen Tobacco Compliance Sample – 2002

	Chain Convenience	Gas Stores/Kiosks	Grocery	Ind't Convenience	Pharmacies	Final Sample 2002	2002 Sample Target
NATIONAL	938	1,480	854	1,869	409	5,550	5561
ST. JOHN'S	15	40	20	93	29	197	197
CHARLOTTETOWN	3	21	11	37	10	82	82
NEW BRUNSWICK	13	89	28	158	NA	288	285
BATHURST	NA	17	3	19	NA	39	40
FREDERICTON	1	25	6	41	NA	73	73
MONCTON	10	18	7	37	NA	72	71
SAINT JOHN	2	29	12	61	NA	104	101
NOVA SCOTIA	35	97	23	214	NA	369	371
HALIFAX	24	64	11	147	NA	246	246
SYDNEY	11	33	12	67	NA	123	125
QUEBEC	178	236	200	349	NA	963	955
CHIC/JONQUIERE	10	35	17	81	NA	143	142
MONTREAL	100	101	100	100	NA	401	400
QUEBEC CITY	52	70	69	123	NA	314	310
SHERBROOKE	16	30	14	45	NA	105	103
ONTARIO	315	339	201	401	NA	1,256	1260
KINGSTON	17	19	9	31	NA	76	76
OTTAWA	51	62	45	49	NA	207	208
ST. CATHARINES	69	54	21	87	NA	231	234
SUDBURY	9	34	11	53	NA	107	107
THUNDER BAY	12	27	4	31	NA	74	73
TORONTO	101	100	104	104	NA	409	408
WINDSOR	56	43	7	46	NA	152	154
MANITOBA	55	87	57	81	45	325	338
BRANDON	4	19	6	10	1	40	52
WINNIPEG	51	68	51	71	44	285	286
SASKATCHEWAN	41	125	37	63	53	319	320
REGINA	17	57	17	37	23	151	151
SASKATOON	24	68	20	26	30	168	169
ALBERTA	173	184	126	174	149	806	803
CALGARY	86	73	45	91	52	347	347
EDMONTON	78	76	70	53	78	355	352
MEDICINE HAT	4	24	7	16	10	61	61
RED DEER	5	11	4	14	9	43	43
BRITISH COLUMBIA	110	262	151	299	123	945	950
KELOWNA	7	39	14	26	7	93	94
CAMPBELL RIVER/COURTNAY	6	23	11	28	9	77	77
VANCOUVER CMA	97	200	126	245	107	775	779
VANCOUVER 1	43	52	37	63	39	234	230
VANCOUVER 2	27	58	35	60	28	208	209
VANCOUVER 3	23	60	40	60	31	214	214
VANCOUVER 4	4	30	14	62	9	119	126

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

RESEARCH FINDINGS

PART A
TOBACCO SALES-TO-MINORS LEGISLATION

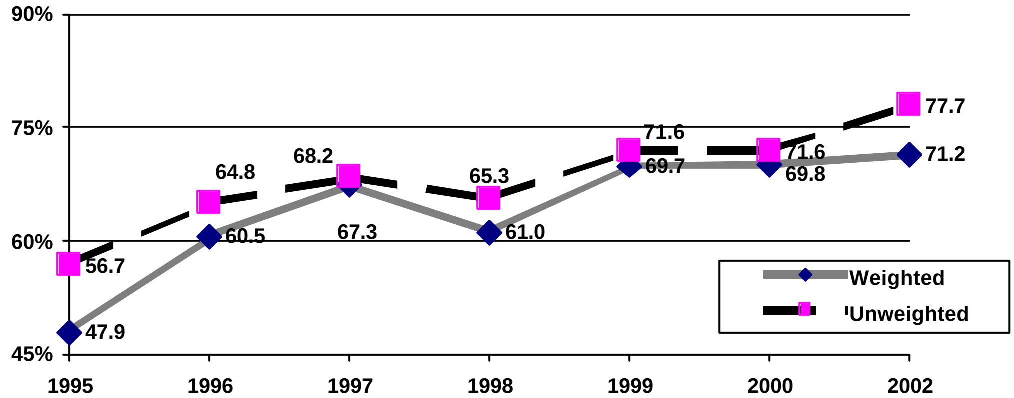
Section 1: Tobacco Sales To Minors

This section presents our findings of retailer compliance with respect to those provisions of sales-to-minors legislation prohibiting the sale of tobacco products to underage youth.

1.1. National Results

For the first time, weighted compliance estimates are above seventy percent. Retailer compliance is at 71.2% across all stores visited in 2002. The figure is 70.3% across stores within the same twenty-five core cities visited in each of the previous three surveys. This compares with 69.8% in 2000. Trend comparisons nationally are accurate +/- 1.2, 19 times out of 20 at the 95% confidence level. Retailer compliance in the current survey is higher than in the 2000 survey by an amount that is within the margin of error, so while the absolute increase is not statistically significant, the data confirms that the gains of the past few years are holding.

Chart 1 - % Retailers Refusing To Sell To Minors - National All Outlets*



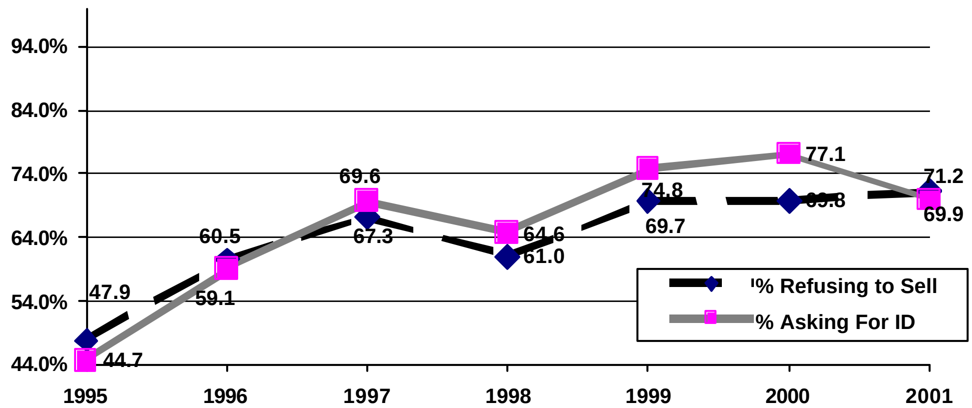
**Note: 1995/1996 and 2002 data are from surveys using similar, but not identical methodology to that used in 1997-2001. Caution should be exercised when analyzing results for comparative purposes.*

The weighted result is a statistical estimate that represents the compliance rate we would have obtained had every retail establishment in our universe been visited instead of just a sample of these stores. The finding is calculated by applying a "weighting factor" to adjust the raw store count in each sampled cell to the total estimated universe of stores in that cell. When the data is weighted, results from cells with more stores in the universe will have a proportionately greater influence on aggregated findings than cells in which the store universe is smaller.

“Raw” results represent the findings across the stores we actually visited, before weights are applied. In 2002, the retailer compliance level across the total raw sample is 77.7%, considerably better than the weighted result, and consistent with a steadily improving trend noted since 1995. This raw trend is important because it provides insight on the meaning of the weighted national compliance figure that, on the surface, appears to have changed little, if at all. The weighted compliance estimate, together with the higher raw figure, implies that retailer compliance across sampled cells where the store universe is proportionately smaller (eg: smaller cities) has improved compared within the situation in cells where the store universe is larger. In fact, the regional data will show that compliance levels are above average and have actually improved in the great majority of cities visited (Section 1.2 of this report). The reason that the weighted national figure is not higher than it is stems from compliance decreases in a handful of cities, including the largest in the country.

The percentage of tobacco retailers willing to ask young customers for proof of age is 69.9% in the latest study, down from 77.1% in 2000. In past reports, the correlation between the willingness of retailers to ask for ID and their refusal to sell was direct and indisputable. The current data continue to support that link. Even though a lesser proportion of retailers requested proof of age this study than last, compliance rates held because the overwhelming percentage of retailers who did ask for ID refused to sell when none was produced (96.0%). Also, retailers’ sensitivity to the issue of tobacco sales to minors may be increasing to the point where more retailers are ready to reject selling to suspect customers without even asking for ID. In 2002, it was the case that a higher proportion of retailers than in recent studies chose not to ask for ID but refused to sell anyway (Table 1, next page).

Chart 2 -Compliance Trend & % Retailers Asking For ID
National - All Outlets* - Weighted



*

1995/1996 and 2002 data are from surveys using similar, but not identical, methodology to that used in 1997-1999. View comparisons with appropriate caution.

Table 1 - Findings Related To Request For Proof Of Age – 1998-2002 National - All Stores - Weighted				
	1998	*1999*	*2000*	*2002*
% Retailers Asking For ID	64.6	74.8	77.1	69.9
% Retailers Not Asking For ID	35.4	25.2	22.9	30.1
Retailers Who Refused To Sell As % Of Those Asking For ID	89.2	89.4	88.5	96.0
Retailers Who Were Willing To Sell As % Of Those Asking For ID	10.8	10.6	11.5	4.0
Retailers Willing To Sell As % Of Those Not Asking For ID	90.6	88.7	93.0	86.4
Retailers Refusing To Sell As % Of Those Not Asking For ID	9.4	11.3	7.0	13.6

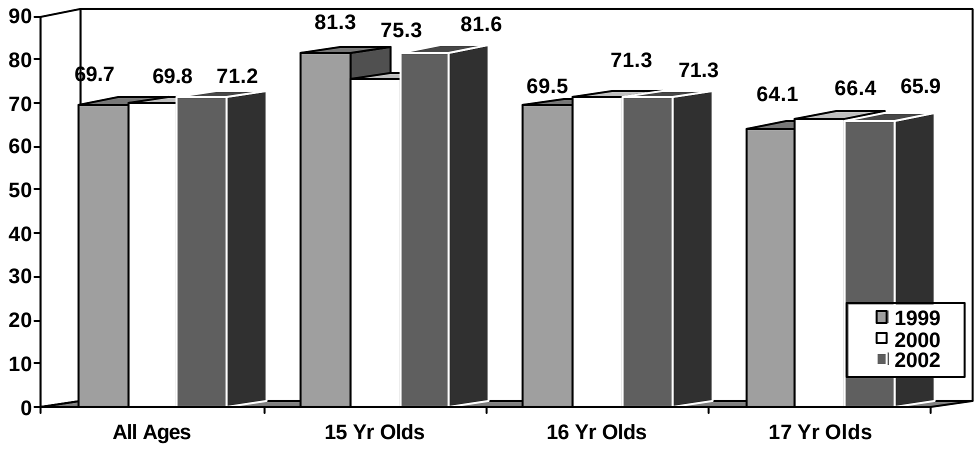
1.1.1. National Results By Age of Minor

Retailers remain less likely to sell tobacco to younger than older teens. This year, the rate of compliance when fifteen year olds attempted to buy cigarettes has climbed back above eighty percent. This level is significantly improved from that of the previous study.

Compliance rates when sixteen and seventeen year olds were involved are virtually unchanged from those of the last measurement.

Compliance rates involving all age groups are holding within the range established over the past few years.

Chart 3 - Weighted
Sales Compliance Results By Age Of Minor - National All Stores
% Retailers Refusing Cigarettes To Minors



Retailers were about as likely to ask fifteen-year olds as sixteen-year olds for proof of age. They were slightly less likely to ask seventeen-year olds for ID (Table 2). In the case of teens of all ages of whom ID was requested, over ninety-percent of retailers refused to sell when no identification was shown. Retailers who take the time to ask for identification when the age of young customers is in doubt are far more likely than those who don't to refuse a tobacco sale to minors.

This year's results also show that more retailers than usual were prepared to refuse a sale to the youngest teens outright, without even asking for ID. Of those retailers failing to ask fifteen-year olds for ID, two-thirds simply refused the sale. This is the key factor explaining why the compliance rate involving fifteen-year olds is higher this year than that involving older teens, and higher also than it was in 2000. Clearly, these youngest customers were simply assumed to be underage without the need for further inquiry. Possibly, the continuing effort to sensitize retailers to the risks of selling tobacco to children is manifesting itself in the stronger predisposition of retailers to refuse sales, first and foremost, to their youngest customers.

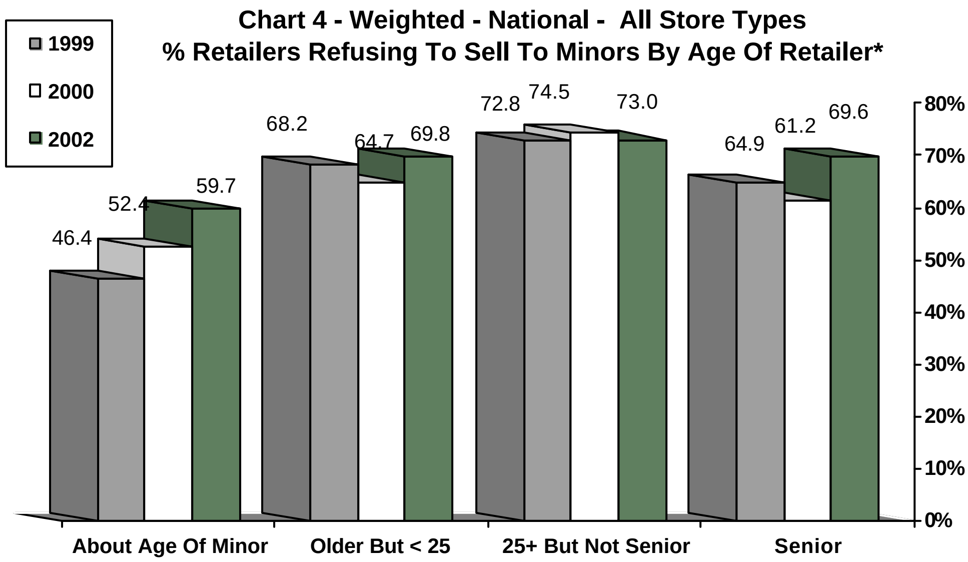
Table 2 - Findings Related To Request For Proof Of Age By Age Of Minor – 2002
National - All Stores - Weighted

Age Of Minor:	15 Years Old	16 Years Old	17 Years Old
% of Retailers Refusing To Sell	81.6	71.3	65.9
% Retailers Asking For ID	72.9	71.9	67.3
% Retailers Not Asking For ID	27.1	28.1	32.7
Retailers Who Refused To Sell As % of Those Asking For ID	97.9	96.0	94.9
Retailers Who Were Willing To Sell As % Those Asking For ID	2.1	4.0	5.1
Retailers Who Refused To Sell As % of Those Not Asking For ID	62.3	8.1	6.3

1.1. 2. National Results By Age of Clerk

Young Canadians continue to have a much easier time purchasing cigarettes when other teenagers are behind the tobacco counter than when the counter is staffed by older clerks. When very young clerks are behind the counter, compliance stands at 59.7%--- well below the national average and significantly lower than for clerks of any other age.

Nonetheless, the current rate of compliance among youngest clerks is higher than at any time in the past. Concurrently, compliance among older clerks is holding or improved over previous measurements, with levels among seniors well above the figure in 2000. That improvements within the youngest and oldest segments of the retailer population did not have more of a positive impact on the total weighted national result is due to a relatively small percentage of stores being manned by clerks in these age brackets. In total, only sixteen percent of 5,550 stores we visited had clerks in these age brackets (about eight percent in each). The finding suggests that retailer compliance rates could be improved overall if very young clerks, especially, could become more disciplined. However, they remain a relatively small part of the problem.



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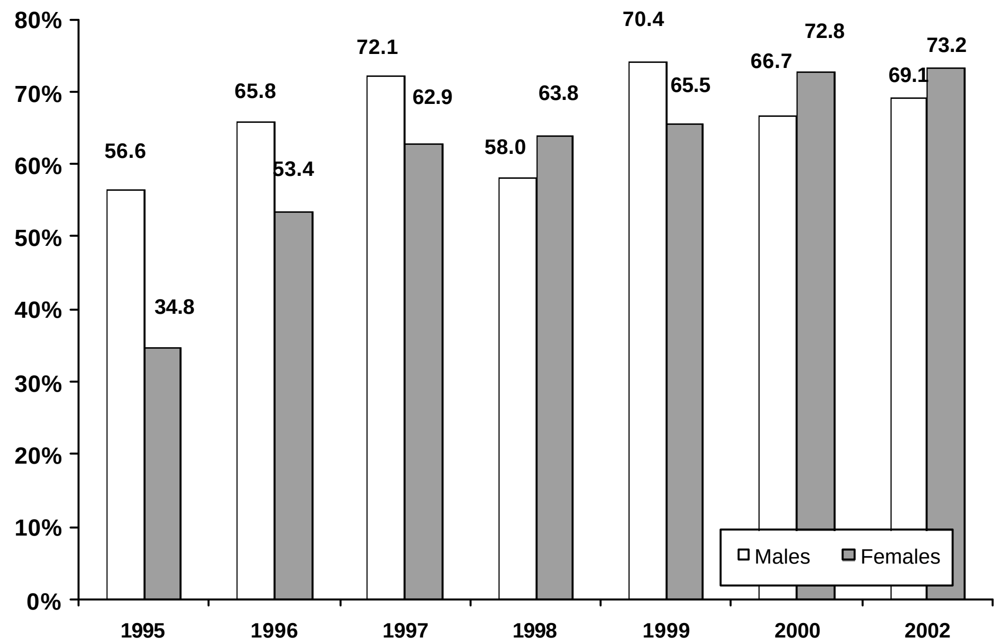
1.1.3. National Results By Gender

Results By Gender of Minor

The gender of teens attempting to buy cigarettes continues to affect retailer compliance with the sales-to-minor provisions of the tobacco laws. Underage girls remain more likely to be refused a sale than underage boys, and compliance when girls are the ones trying to buy cigarettes is the highest it has been in recent years.

The historical record obviously is not unanimous when it comes to gender's influence on compliance However, what appears to be clear is that the influence of teen gender on retailer behaviour is waning. The compliance gap between the genders closed a little more since the last survey and is now the smallest it has been since we started taking measurements in 1995. The main reason is improving retailer compliance rates when boys are involved.

Chart 5 – Weighted
% Retailers Indicating Refusal To Sell
Results By Gender of Minor - Trended



What differences still exist between the ability of boys and girls to purchase cigarettes reflect the failure of retailers to ask identification of both genders equally. When they were asked to present ID, boys and girls were refused the sale in equally large measure. However, only 66.3% of boys were asked for ID compared with 73.4% of girls. And while boys were also more likely than girls to be refused a sale without being asked for proof of age, the difference is not great enough to erase the consequence of a full third of boys never being asked for ID in the first place.

Table 3 - Findings Related To Request For Proof Of Age By Gender of Minor – 2002 National - All Stores - Weighted		
Gender of Minor:	*Male*	*Female*
% Retailers Refusing To Sell	69.1	73.2
% Retailers Asking For ID	66.3	73.4
% Retailers Not Asking For ID	33.7	26.6
Retailers Refusing To Sell As % of Those Asking For ID	95.8	96.1
Retailers Refusing To Sell As % of Those Not Asking For ID	16.4	10.1

Results By Gender of Clerk

The latest data add to the chain of evidence suggesting that female clerks are somewhat more likely than male clerks to refuse to sell tobacco to minors. The gap is within the range of statistical significance and the current results reinforce the findings of the past several years. The data further suggest that compliance when female clerks are involved continues to improve, while the rate when men are involved has remained more or less unchanged since 1998.

Clerks who are female were about as likely as those who are male to require proper proof of age before offering to sell. Failure to produce proper ID resulted in very high incidences of refusal among both male and female clerks.

Table 4 – Compliance Indicators By Gender of Retail Clerk National – All Stores (Weighted) – Trended						
	% Refused To Sell		% Who Asked For ID		% Of Those Asking For ID Who Did Not Sell	
Gender of Clerk	*Male*	*Female*	*Male*	*Female*	*Male*	*Female*
2002	68.6	73.2	67.7	71.7	94.2	97.3
2000	68.0	71.6	77.1	77.1	85.8	91.0
1999	68.7	70.5	72.4	76.7	90.0	86.6
1998	57.8	63.2	62.8	66.0	88.9	91.0

1.1. 4. National Results By Proximity to Schools &/or Malls

Schools and malls are heavily frequented by young teens. It is of interest to know whether the concentrated presence of children in proximity to a school and/or mall tends to affect retailer behaviour with respect to their obligations under the tobacco laws.

For our purpose, “proximity” to schools or malls is defined to mean a store within a 300-metre radius of either establishment. Just less than half the stores in our latest sample (48%) were located near schools or malls and just over half (52%) were not.

The data of the past studies have been inconclusive on this dimension. This year’s findings indicate that retailers operating close to schools or malls are somewhat more likely to refuse a sale than those further away from these locations. Contributing to the result is the increased propensity of retailers near schools and malls to ask for ID.

The finding at the national level does not hold equally up across all regions, but tends to hold up in enough of the thirty communities visited that we consider it noteworthy. (Regional variations are discussed elsewhere in this report).

Table 5 – Compliance Indicators By Proximity to School/Malls
National – All Stores (Weighted) – Trended

	% Refused To Sell			% Who Asked For ID		
Store Located:	1999	2000	2002	1999	2000	2002
Near school and/or mall	71.1	71.7	74.0	78.9	78.9	72.6
Elsewhere	69.0	68.5	68.8	72.5	75.8	67.7

1.1. 5. National Results By Time of Visit

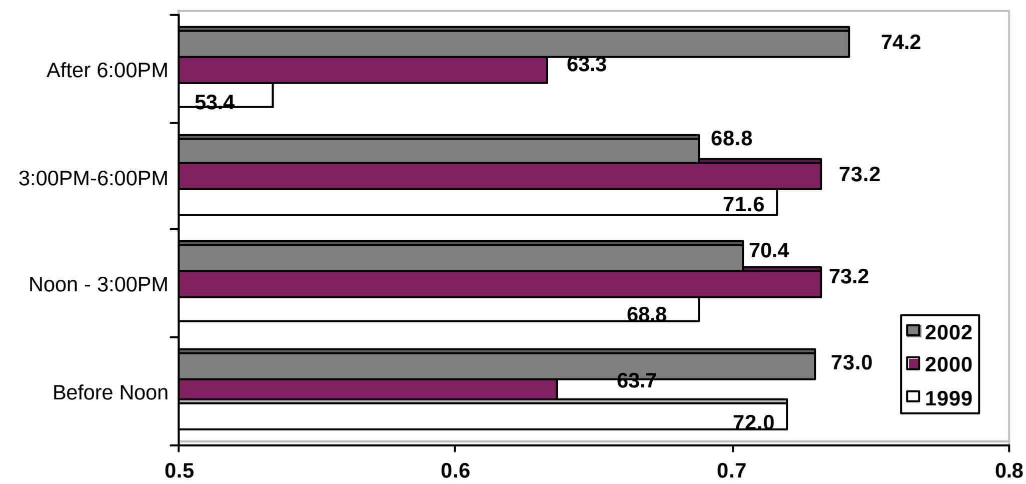
Results By Time of Day

Compliance statistics were collected and tabulated based on the general time of day when stores were visited.

As always, we remind the reader that the time of store visits has no direct bearing on retailer compliance levels. Any difference observed in compliance across time-periods is inevitably the influence of other, more dominant variables at play. This year, more than sixty percent of store visits were conducted between noon and 6:00PM, and it is no surprise that a large proportion of these visits were conducted using teens of an age or gender to which retailers have been shown to have a greater propensity to sell.

Compliance was lowest in stores visited between noon and 6:00PM. The difference in compliance is far less pronounced between day-parts this year than has previously been the case.

Chart 6 - % Retailers Unwilling To Sell By Time Of Visit
National - All Stores (Weighted) - 2000/01 vs 1999

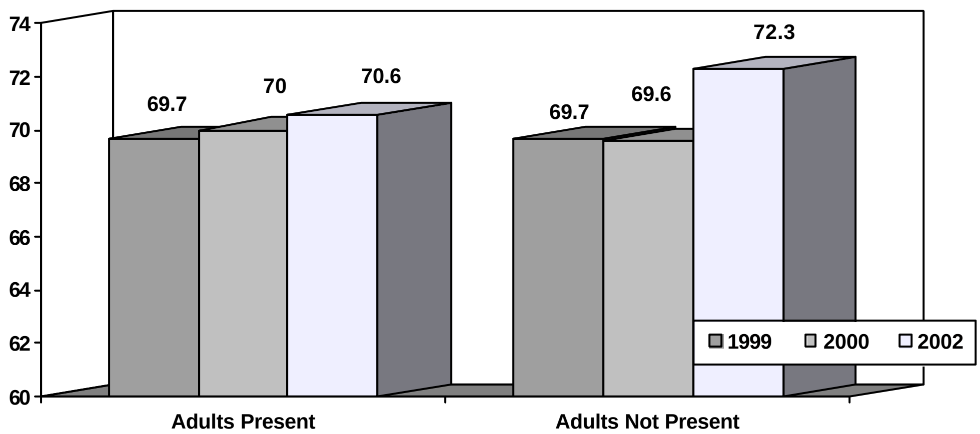


1.1.6. National Results By Presence of Adults In Store

Compliance estimates were tabulated based on the presence of adult customers in the store at the time of our attempt to purchase. Is it the case that the presence of adult patrons results in retailers being more careful about selling cigarettes to young persons?

Adult customers were present in more than two-thirds (68.4%) of sample stores at the time of our call. Contrary to expectations, retailer compliance was lower, in absolute terms, in stores with adult customers than in those where none were present. However, the results are inconclusive. The percentage difference is not large and is statistically insignificant at the 95% confidence interval. These findings compare statistically with those of the past two years when no percentage difference was noted. Moreover, the national result reflects equally inconclusive data at the level of individual cities and regions (discussed later in this report). Quite likely other factors exerted an influence on the results greater than this variable alone.

Chart 7 – Weighted - National
% Of Retailers Refusing to Sell When Other Adults Present/Not Present



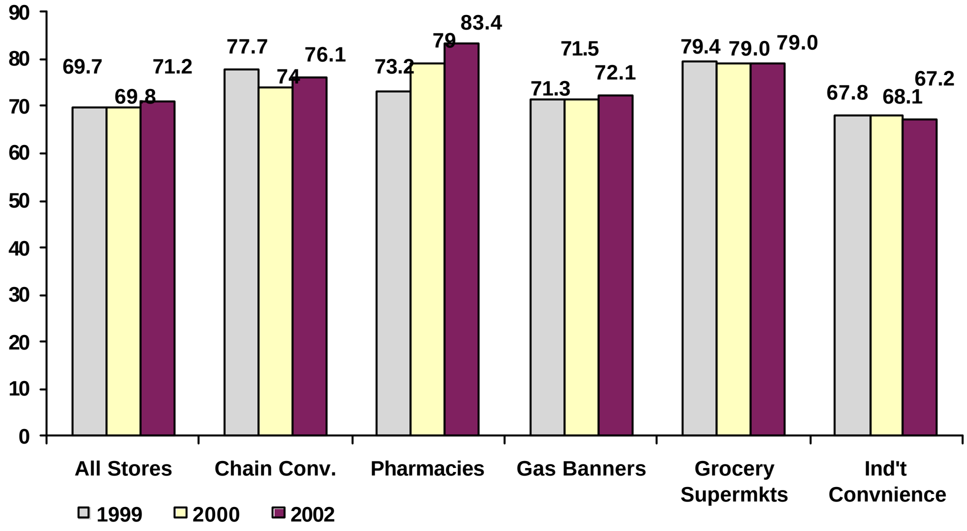
1.1.7. National Results By Class of Trade

With the exception of pharmacies, compliance levels across all other classes of trade have remained stable compared against recent measurements. The rate of compliance across pharmacies stands at 83.4%, higher than ever before and well above the rate reported by retailers in any other trade class. The relatively strong compliance measure for pharmacies is the record of refusal across the ever-diminishing number of these establishments still selling tobacco. In the latest survey, only 409 stores (7%) of the 5,550 visited were pharmacies. The small number reflects the fact that the tobacco retailing drugstore universe is shrinking. In four of ten provinces, including Nova Scotia, New Brunswick, Quebec and Ontario, pharmacies no longer sell tobacco.

Retailers in independent convenience stores once again report the lowest level of compliance with the sales-to-minors provisions of the tobacco laws. This is the only trade class to consistently record a compliance score below seventy percent. The current level is below that reported in most recent surveys, but within the recent historical range for this trade channel.

Of course, the physical structure of a retail establishment cannot in itself influence a retailer's actions. Different compliance rates between classes of trade reflect the predisposition of the people behind the tobacco counter to react differently to conditions and factors having a more direct bearing on their behaviour. The structure of the organization certainly has some bearing on results. Retail chains and store banners controlled centrally are likely to have more highly defined operating standards, hiring and training practices than independent store operators. These factors undoubtedly contribute to corporate stores conforming better to the laws. It is no coincidence that retailers in the concentrated grocery supermarket and chain convenience business consistently report higher levels of compliance than those in independent convenience stores or gas station kiosks.

Chart 8 - % Retailers Refusing Sales To Minors By Class Of Trade
All Cities (Weighted) - 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 cigarettes to minors under the age of eighteen. 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 nineteen.

Nationally, the percentage of retailers refusing to sell cigarettes to minors in 2002 is 71.2%. The rate is higher in absolute terms than that reported in 2000 and 1999, but the difference is within the statistical margin of error. This overall compliance rate is a weighted average of conditions across regions and thirty cities. This year, five new cities were added to the sample of cities visited for previous studies, and so the results at the national level are not directly comparable except when references are kept to the core 25 cities that all the studies have in common. The compliance rate this year across the core cities is 70.3%, closer still to that reported in 2000.

Where the national figure is mildly more positive than before, at the regional level most cities we visited reported significant improvement in retailer compliance over the previous measurement, in 2000.

Compliance rates improved in sixteen (64%) of the twenty-five core cities visited again in 2002.[1] The straight average of the gains in these sixteen cities (i.e., not weighted by the relative population size of the cities involved) is 21.5 points. In ten of sixteen cities, the gains were in double-digits, though all of the cities involved reported strong compliance increases:

- Sherbrooke + 46.0 points
- Quebec City +39.9 points
- Windsor +37.9 points
- Kelowna +36.2 points
- Sydney +33.9 points
- Calgary +32.0 points
- Ottawa +29.0 points
- Chicoutimi/Jonquiere +15.9 points
- Regina +15.1 points
- Campbell River/Courtnay +12.5 points
- St. John's, NFLD +10.4 points
- Saskatoon +9.3 points
- Edmonton +7.9 points
- Sudbury +7.1 points
- Saint John, NB +6.0 points
- Fredericton +5.0 points

The gains that were made extend across the breadth of Canada. Cities in eight of the ten provinces reported compliance increases, and at least half of the core cities visited in every province except PEI and Manitoba did so. In provinces where more than one city was visited, the largest improvements were in Alberta (20 points), Saskatchewan (12 points) and Quebec (10 points). Total compliance in Alberta and Saskatchewan is at 87.0% and 93.4%, respectively. In Quebec, three of four cities visited make the list of top gainers. Indeed, the largest gains of any city were reported in Sherbrooke and Quebec City, where levels were higher than for any previous measurement. These gains, though, coupled with weaker compliance in Montreal were not enough to raise the provincial compliance average above the national level.

[1] Unless otherwise stated, the larger census metropolitan area (CMA) of Vancouver is treated for analytical purposes as a single community and one of thirty communities sampled, twenty-five of which are core cities. References to results for the four sub-components making up the Vancouver CMA are made throughout this report as appropriate.

There are eight cities of the core 25 where compliance rates dropped relative to estimates in 2000. The straight average of the losses across these cities (i.e., not weighted by the relative population sizes of the cities involved) is 16.1 points. In five of the eight cities involved, the decreases were in double-digits:

• Bathurst	-36.3 points
• Halifax	-22.7 points
• Toronto	-19.7 points
• Winnipeg	-15.2 points
• Charlottetown	-10.4 points
• Vancouver	-9.9 points
• Montreal	-9.0 points
• Medicine Hat	-5.7 points

The list of cities reporting lower compliance includes the largest cities in the country. It is weakness in these markets that caused the national compliance figure to rise only marginally from the levels of the previous two surveys. Of the eight cities, two continue to show compliance levels above the national average, including Medicine Hat (89.9% compliance) and Charlottetown (75.6% compliance).

The decreases in Halifax, Toronto, Winnipeg and Vancouver were sharp enough to bring down the compliance average of their respective provinces. In Manitoba, the declines in Winnipeg resulted in the lowest absolute compliance estimate since measurements began in 1995. In Vancouver, the results were weighed down by lower compliance rates in certain sub-regions of the city (see results Table 6, Vancouver sub-regions 1 and 2).

Declines in most of the cities appear generalized, reproduced across teen age/gender breaks that have been shown to influence retailer behaviour. However, in at least two cities, the weakness is isolated to particular circumstances and should not be seen as a universal diminishment of respect for the tobacco laws in these communities. In Vancouver, compliance was markedly weaker in stores visited by a seventeen-year old male. In Montreal, levels were much weaker in stores visited by boys than those visited by girls. The facts do not excuse the results, and the willingness of retailers to sell in these particular cases had a negative enough influence to bring down total compliance in these cities. Nonetheless, it is clear that the appearance, age and gender of the teens used in these cities affected the trend.[2] (Results by age and gender are reviewed in more detail later in this report.)

Brandon is the last of the core 25 cities not mentioned in either the list of top gainers or top decliners. In this city, retailer compliance was essentially unchanged from 2000 levels.

The five cities included in our sample for the first time this year contributed positively to the overall national average. Each of these cities reported compliance above the national average, with most reporting levels well above eighty percent.

[2] Age and gender splits in these and other cities were selected according to pre-established guidelines and past distributions. The age of all ACNielsen teen recruits is verified before hiring and teens are instructed not to change their appearance deliberately to look older. However, teens are not test-marketed beforehand for appearance and some observers might naturally look older than their age.

Sixty percent (or eighteen communities) of the thirty cities visited already show compliance at the stated national target of eighty percent or better. Ten of these report compliance above ninety-percent. Three other cities show compliance between seventy-five and eighty percent:

• Kelowna	100.0%	• Medicine Hat	89.9%
• Moncton	98.5%	• Kingston	88.7%
• St. John's, NFLD	98.2%	• Sherbrooke	87.1%
• Windsor	97.9%	• Sydney	86.1%
• Campbell River/Courtnay	97.6%	• Fredericton	84.9%
• Ottawa	97.6%	• Brandon	84.9%
• Thunder Bay	96.2%	• Red Deer	81.3%
• Regina	95.2%	• Chicoutimi/Jonquiere	80.4%
• Calgary	95.0%	• Edmonton	79.6%
• Saskatoon	91.9%	• St. Catharines	77.1%
		• Charlottetown	75.6%

Bathurst and Toronto were on the list of cities with highest compliance in the last survey, but fell off in 2002.[3] Six cities stayed on this year's list (Medicine Hat, St. John's, Campbell River/Courtnay, Brandon, Saskatoon and Regina). Thirteen others joined the list this year.

The results in Regina and Saskatoon are the first since the introduction of new provincial controls on tobacco sales and merchandising at point-of-sale. Compliance rates in Saskatchewan have historically been in line with, or higher than the national average, so the high compliance of the current year is not unexpected. The figure towards near total compliance is, however, impressive and certainly the highest either Saskatoon or Regina has scored historically. Their respective levels are also more consistent than readings between the two cities have been in the past.

There are four communities where retailer compliance in 2002 was below sixty percent:

• Halifax	54.1%
• Montreal	54.2%
• Quebec City	58.4%
• Bathurst	59.1%

It is encouraging to note that even compliance "lows" are now considerably higher than in past studies. This is the first year that no city fell below fifty percent total compliance.

[3] *Final Report of Findings 2000/01: Measurement of Retailer Compliance With Respect to the* Tobacco Act *& Provincial Tobacco Sales-to-Minors Legislation*, ACNielsen, March 2001, pp. 36-40.

Table 6 - % Retailers Refusing To Sell By Region
Trended Results (Weighted)

	1995 Results	1996 Results	1997 Results	1998 Results	1999 Results	2000 Results	2002 Results
NATIONAL							71.2
NATIONAL CORE 25	47.9	60.5	67.3	61.0	69.7	69.8	70.3
ST. JOHN'S	33.2	58.4	83.4	79.6	52.4	87.8	98.2
CHARLOTTETOWN	90.4	34.3	72.9	77.9	86.0	86.0	75.6
NEW BRUNSWICK							81.6
NEW BRUNSWICK CORE	88.8	84.8	58.0	40.7	42.1	72.7	73.1
BATHURST	8.3	38.7	60.0	22.6	60.3	95.4	59.1
FREDRICTON	99.9	89.5	49.3	39.8	30.2	79.9	84.9
MONCTON	NA	NA	NA	NA	NA	NA	98.5
SAINT JOHN	94.2	87.6	61.5	42.7	45.9	67.1	73.1
NOVA SCOTIA	75.5	89.8	64.1	69.3	73.3	70.9	63.8
HALIFAX	NA	NA	57.4	62.2	84.5	76.8	54.1
SYDNEY	96.8	98.1	80.5	86.5	45.3	52.2	86.1
QUEBEC	23.9	28.8	45.4	48.7	65.2	47.0	57.0
CHICOUTIMI/JONQUIRE	16.0	14.3	49.0	47.9	72.2	64.5	80.4
MONTREAL	27.7	27.9	45.4	62.0	69.3	63.2	54.2
QUEBEC CITY	9.1	33.8	44.8	25.1	57.3	18.5	58.4
SHERBROOKE	32.7	45.9	45.0	47.5	69.4	41.1	87.1
ONTARIO							74.8
ONTARIO CORE	62.2	73.3	69.4	62.0	79.1	83.7	73.6
KINGSTON	NA	NA	NA	NA	NA	NA	88.7
OTTAWA	40.1	46.5	72.1	55.5	84.3	68.6	97.6
ST. CATHARINES	NA	NA	NA	NA	NA	NA	77.1
SUDBURY	74.2	61.1	80.2	79.7	84.1	59.6	66.7
TORONTO	68.6	77.3	67.9	62.4	78.5	87.5	67.8
THUNDER BAY	NA	NA	NA	NA	NA	NA	96.2
WINDSOR	63.1	93.2	86.5	63.0	73.0	60.0	97.9
MANITOBA	56.5	76.8	72.1	67.7	83.7	78.9	65.2
BRANDON	61.0	69.3	47.2	79.8	92.6	84.5	84.9
WINNIPEG	56.4	76.9	72.3	67.5	83.6	78.8	63.6
SASKATCHEWAN	30.1	77.8	66.9	73.8	78.9	81.4	93.4
REGINA	NA	NA	58.6	72.5	70.7	80.1	95.2
SASKATOON	NA	NA	74.6	75.2	85.9	82.6	91.9
ALBERTA							87.0
ALBERTA CORE	60.1	68.6	80.3	75.4	73.6	67.3	87.3
CALGARY	42.1	55.9	82.6	82.6	63.2	63.0	95.0
EDMONTON	75.4	78.7	78.1	68.2	85.4	71.7	79.6
MEDICINE HAT	95.6	93.4	69.4	62.5	6.6	95.6	89.9
RED DEER	NA	NA	NA	NA	NA	NA	81.3
BRITISH COLUMBIA	69.2	74.0	77.7	60.3	59.3	75.3	69.3
KELOWNA	53.2	53.6	82.9	87.6	98.2	63.8	100.0
CAMPBELL RIVER/COURTNAY	100.0	100.0	94.5	86.8	98.2	85.1	97.6
VANCOUVER CMA	69.1	74.0	77.5	59.6	58.2	75.4	65.5
VANCOUVER 1	NA	NA	NA	NA	NA	NA	62.2
VANCOUVER 2	NA	NA	NA	NA	NA	NA	63.8
VANCOUVER 3	NA	NA	NA	NA	NA	NA	71.3
VANCOUVER 4	NA	NA	NA	NA	NA	NA	72.3

**Historical trends based on similar, but not identical, methodologies and city samples. View comparisons with appropriate cau tion.*
Vancouver 1: Vancouver, Richmond
Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North Vancouver, West Vancouver

Table 7 - Weighted - Sales To Minors Compliance
Results By City/Province/Region – 2002

	% Unwilling to Sell (Compliant)	% Willing to Sell (Non-Compliant)	% Who Asked for ID	% Who Asked for ID & Did Not Sell	% Who Asked for ID but Willing to Sell	% Who Did Not Ask for ID and Willing to Sell
NATIONAL	71.2	28.8	69.9	96.0	4.0	86.4
NATIONAL CORE 25	70.3	29.7	68.9	95.9	4.1	86.4
ST. JOHN'S	98.2	1.8	96.3	99.0	1.0	24.7
CHARLOTTETOWN	75.6	24.4	80.4	92.5	7.5	93.5
NEW BRUNSWICK	81.6	18.4	78.3	98.6	1.4	80.0
NEW BRUNSWICK CORE	73.1	26.9	68.2	98.8	1.2	81.8
BATHURST	59.1	40.9	56.2	100.0	NA	93.3
FREDERICTON	84.9	15.1	80.8	100.0	NA	78.6
MONCTON	98.5	1.5	98.6	98.5	1.5	NA
SAINT JOHN	73.1	26.9	66.3	97.1	2.9	74.3
NOVA SCOTIA	63.8	36.2	64.9	95.9	4.1	95.4
HALIFAX	54.1	45.9	56.3	93.9	6.1	97.2
SYDNEY	86.1	13.9	84.4	99.1	0.9	84.2
QUEBEC	57.0	43.0	54.5	97.8	2.2	91.7
CHIC/JONQUIERE	80.4	19.6	81.0	95.7	4.3	85.1
MONTREAL	54.2	45.8	51.4	97.3	2.7	91.5
QUEBEC CITY	58.4	41.6	56.6	99.4	0.6	95.1
SHERBROOKE	87.1	12.9	82.3	100.0	NA	72.9
ONTARIO	74.8	25.2	73.3	93.4	6.6	76.5
ONTARIO CORE	73.6	26.4	71.8	93.0	7.0	75.7
KINGSTON	88.7	11.3	82.2	96.6	3.4	47.6
OTTAWA	97.6	2.4	94.1	99.3	0.7	29.9
ST. CATHARINES	77.1	22.9	81.1	94.4	5.6	97.4
SUDBURY	66.7	33.3	70.5	93.5	6.5	97.2
THUNDER BAY	96.2	3.8	94.3	100.0	NA	67.1
TORONTO	67.8	32.2	66.0	90.7	9.3	76.6
WINDSOR	97.9	2.1	97.0	99.2	0.8	44.0
MANITOBA	65.2	34.8	67.0	94.9	5.1	94.9
BRANDON	84.9	15.1	85.8	94.3	5.7	71.7
WINNIPEG	63.6	36.4	65.4	94.9	5.1	95.7
SASKATCHEWAN	93.4	6.6	92.4	98.4	1.6	66.6
REGINA	95.2	4.8	95.4	99.2	0.8	88.6
SASKATOON	91.9	8.1	89.8	97.6	2.4	57.8
ALBERTA	87.0	13.0	86.2	98.1	1.9	81.8
ALBERTA CORE	87.3	12.7	86.4	98.0	2.0	80.7
CALGARY	95.0	5.0	92.2	99.6	0.4	60.1
EDMONTON	79.6	20.4	80.7	96.0	4.0	88.9
MEDICINE HAT	89.9	10.1	87.3	100.0	NA	79.2
RED DEER	81.3	18.7	81.3	100.0	NA	100.0
BRITISH COLUMBIA	69.3	30.7	69.4	97.3	2.7	94.1
KELOWNA	100.0	NA	100.0	100.0	NA	NA
CAMPBELL RIVER/COURTNAY	97.6	2.4	92.7	100.0	NA	33.3
VANCOUVER CMA	65.5	34.5	65.8	96.8	3.2	94.8
VANCOUVER 1	62.2	37.8	62.5	96.9	3.1	95.7
VANCOUVER 2	63.8	36.2	64.1	97.6	2.4	96.7
VANCOUVER 3	71.3	28.7	71.3	96.3	3.7	91.0
VANCOUVER 4	72.3	27.7	73.7	95.1	4.9	91.4

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

1.2.1. Regional Results By Age of Minor (Table 8)

The research design called for store visits to be completed by teens fifteen, sixteen and seventeen years of age. Nationally, approximately half of the sample was visited by seventeen-year-olds, and the balance was visited by fifteen and sixteen year olds in roughly equal proportions.

At the level of individual cities and regions, wherever sample sizes permitted, we targeted for store visits to be completed in proportions similar to the national average. In eleven cities where the number of stores in the sample was below one hundred, it was impractical to engage teens of each age for this project. In six cities (Charlottetown, Fredericton, Moncton, Kingston, Kelowna and Campbell River/Courtnay) teens representative of two of the three age groups were used; in four other cities (Bathurst, Thunder Bay, Brandon and Medicine Hat) only sixteen year olds were used; in Red Deer, a fifteen year old was used. In the core 25 cities, the deployment of teens according to age in each city was consistent with that of the 2000 survey.

Nationally, retailer compliance levels varied inversely with the age of teens attempting to make a tobacco purchase. The older the teen, the more likely retailers were willing to sell. At the level of regions and cities, we see evidence to this effect as well, but more so in some cities than others and to a degree less pronounced than was noted in the past. Interestingly, we find more cities now than ever before where levels of compliance are above the national average and where retailer compliance levels remain largely constant no matter the age of those trying to buy. The reason compliance rates are not better than they are is because those remaining few communities where the customer's age continues to make a difference tend to be bigger, with more stores in their universe, than those where it does not. The findings here have a greater weighting on the total result and depress the national weighted figure to a level lower than it would be otherwise.

Below are highlights from this portion of our research:

- among twenty-five cities where stores were visited by teens of at least two different age groups, retailers in the majority (thirteen cities or 52%) refused a sale at least eighty percent of the time, regardless of the young person's age;
- across the thirty cities visited, we deployed teens in seventy-two different age-within-city combinations. For example, in Toronto, three age-sets were used (fifteen, sixteen and seventeen-year olds). In two-thirds of all the combinations (67%), retailer compliance came in at eighty percent or better. Only in less than a fifth of the sets (19%) did retailers score compliance levels below sixty percent;
- of twenty-three communities where seventeen-year-olds attempted to buy cigarettes, retailers in only seven of these communities (i.e., 33%) scored compliance levels lower than the national average. The lowest incidence of compliance involving seventeen-year-olds was in Halifax (38.7%) and Saint John (47.1%). These were the only cities where compliance involving seventeen-year old teens was below fifty percent, compared with results in 2000 when seven cities made the list;
- among nineteen cities where stores were visited by teens from each of three age groups, retailers in fewer than half (eight cities or 42%) were found more willing to sell to sixteen or seventeen year olds than they were to fifteen year olds. Among these cities were two of Canada's three largest, Toronto and Vancouver;
- of twenty-two communities where fifteen year olds attempted to buy cigarettes, retailers in fourteen of these communities scored total compliance above the national average. The lowest rates of compliance involving fifteen year olds were in Winnipeg (47.6%)

Quebec City (54.4%), Halifax (56.1%) and Montreal (56.8%). Here again, the results in larger cities have the effect of weighing down the national average;

- Montreal and Quebec City were the two communities where retailers scored low compliance and below the national average within each customer age group.

Table 8 – Weighted - % Retailers Unwilling To Sell By Age Of Minors
Sales To Minors Compliance Results By City/Province/Region 2002

	% Unwilling to Sell (Compliant) Across All Ages	% Unwilling to Sell (Compliant) When Teen Was 15 Yr	% Unwilling to Sell (Compliant) When Teen Was 16 Yr	% Unwilling to Sell (Compliant) When Teen Was 17 Yr
NATIONAL	71.2	81.6	71.3	65.9
NATIONAL CORE 25	70.3	81.4	69.9	65.1
ST. JOHN'S	98.2	98.2	98.1	98.2
CHARLOTTETOWN	75.6	NA	83.2	68.1
NEW BRUNSWICK	81.6	100.0	78.2	82.2
NEW BRUNSWICK CORE	73.1	100.0	72.3	66.7
BATHURST	59.1	NA	59.1	NA
FREDERICTON	84.9	NA	75.7	94.4
MONCTON	98.5	NA	95.8	100.0
SAINT JOHN	73.1	100.0	96.4	47.1
NOVA SCOTIA	63.8	68.1	84.5	51.5
HALIFAX	54.1	56.1	83.4	38.7
SYDNEY	86.1	93.7	86.8	81.6
QUEBEC	57.0	58.1	50.9	59.5
CHIC/JONQUIERE	80.4	78.8	81.0	80.8
MONTREAL	54.2	56.8	48.1	55.9
QUEBEC CITY	58.4	54.4	47.7	65.5
SHERBROOKE	87.1	82.3	93.7	86.2
ONTARIO	74.8	97.1	75.3	63.4
ONTARIO CORE	73.6	98.2	72.6	61.8
KINGSTON	88.7	94.2	NA	83.3
OTTAWA	97.6	98.4	94.4	98.7
ST. CATHARINES	77.1	81.2	76.1	76.2
SUDBURY	66.7	81.2	64.8	59.5
THUNDER BAY	96.2	NA	96.2	NA
TORONTO	67.8	99.4	67.3	52.3
WINDSOR	97.9	91.5	100.0	100.0
MANITOBA	65.2	47.6	46.9	84.9
BRANDON	84.9	NA	84.9	NA
WINNIPEG	63.6	47.6	33.7	84.9
SASKATCHEWAN	93.4	93.1	93.5	93.6
REGINA	95.2	91.4	97.1	96.1
SASKATOON	91.9	94.6	90.1	91.4
ALBERTA	87.0	89.1	91.1	83.5
ALBERTA CORE	87.3	90.5	91.1	83.5
CALGARY	95.0	87.4	96.7	97.8
EDMONTON	79.6	93.4	85.7	69.9
MEDICINE HAT	89.9	NA	89.9	NA
RED DEER	81.3	81.3	NA	NA
BRITISH COLUMBIA	69.3	87.6	77.7	54.1
KELOWNA	100.0	100.0	100.0	NA
CAMPBELL RIVER/COURTNAY	97.6	NA	97.6	97.5
VANCOUVER CMA	65.5	85.7	72.3	52.0
VANCOUVER 1	62.2	79.4	73.3	47.8
VANCOUVER 2	63.8	93.2	60.1	51.1
VANCOUVER 3	71.3	87.4	81.3	58.2
VANCOUVER 4	72.3	92.2	75.3	60.1

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

1.2.2. Regional Results By Age of Clerk (Table 9)

The following are highlights for retailer compliance by region based on the approximate age of the clerk behind the tobacco counter:

- supporting the national trend, compliance in the majority of cites was lowest when the youngest clerks (i.e., those closest of age to the minor) were behind the tobacco counter. In seventeen of thirty cities where this was the case, compliance within the youngest sales clerk age segment was below the overall national average for compliance. In eight cities, compliance within this segment was below sixty. Only in ten cities was it eighty percent or better;
- compliance among youngest clerks was lowest in six cities: Saint John, NB (25.0%), Medicine Hat (40.0%), Kingston (44.2%), Toronto (44.2%), Halifax (43.1%) and Montreal (49.0%). The list includes two cities that are among those reporting lowest overall compliance (Halifax and Montreal) and two others (Toronto and Medicine Hat) that report large total declines since the last study. In Montreal, Halifax and Toronto the weak results are typical of generally low compliance across most variables;
- clerks who are young adults (i.e., older than teens, but under 25 years of age) and middle aged clerks (those 25 years of age and older, but not seniors) represent the bulk of people behind the tobacco counter. Happily, clerks in this age range are more likely than others to refuse a tobacco sale to underage teens;
- in twenty-one of thirty cities, young adults scored compliance levels above the national average. In sixteen cities, compliance when these people were behind the counter was eighty percent or better, and only in four cities was it less than sixty percent;
- in twenty-four of thirty cities, middle-aged adults scored compliance levels above the national average. In twenty cities, compliance when these people were behind the tobacco counter was eighty percent or better, and in only two cities was it below sixty percent;
- compliance levels when seniors were behind the counter are much improved from estimates in previous studies. This year, seniors scored compliance levels above the national average in twenty-four of thirty cities. In twenty-two cities compliance was eighty percent or higher, and in only four cities was it below sixty percent;
- typically, the age of the clerk behind the tobacco counter made little if any difference in cities reporting the very highest levels of compliance. Logically, the key to strong results lies in ensuring that retailers of all ages are equally ingrained with the discipline to execute their responsibilities under the sale-to-minors provisions of the tobacco laws.

Table 9 - Weighted - Sales To Minors Compliance Results By City/Province/Region
% Retailers Unwilling To Sell By Age Of Clerk – 2002

Region	% Unwilling to Sell (compliant) 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	71.2	59.7	69.8	73.9	69.6
NATIONAL CORE 25	70.3	58.6	69.1	73.0	68.3
ST. JOHN'S	98.2	100.0	98.8	97.4	100.0
CHARLOTTETOWN	75.6	61.6	78.6	82.5	100.0
NEW BRUNSWICK	81.6	38.9	77.4	87.3	86.7
NEW BRUNSWICK CORE	73.1	28.9	75.2	77.5	83.2
BATHURST	59.1	NA	62.5	67.2	100.0
FREDERICTON	84.9	66.7	76.5	91.2	87.5
MONCTON	98.5	100.0	88.1	100.0	100.0
SAINT JOHN	73.1	25.0	82.4	75.0	66.7
NOVA SCOTIA	63.8	45.0	61.9	68.0	65.2
HALIFAX	54.1	43.1	57.5	54.4	54.4
SYDNEY	86.1	67.3	81.4	87.5	89.2
QUEBEC	57.0	51.6	57.0	56.7	61.7
CHIC/JONQUIERE	80.4	66.7	74.2	87.3	75.1
MONTREAL	54.2	49.0	54.5	51.6	62.9
QUEBEC CITY	58.4	56.4	55.3	63.8	54.4
SHERBROOKE	87.1	85.8	88.7	83.7	100.0
ONTARIO	74.8	63.2	73.9	76.8	67.6
ONTARIO CORE	73.6	59.6	72.9	75.8	62.3
KINGSTON	88.7	44.2	87.6	93.0	100.0
OTTAWA	97.6	94.6	97.6	97.5	100.0
ST. CATHARINES	77.1	69.2	70.5	80.6	92.8
SUDBURY	66.7	49.8	66.4	73.4	34.7
THUNDER BAY	96.2	91.4	100.0	94.3	100.0
TORONTO	67.8	44.2	65.3	71.5	45.0
WINDSOR	97.9	83.3	97.6	100.0	100.0
MANITOBA	65.2	78.8	48.5	67.8	82.9
BRANDON	84.9	100.0	73.8	86.0	100.0
WINNIPEG	63.6	77.8	45.5	66.7	79.4
SASKATCHEWAN	93.4	77.1	92.0	96.4	100.0
REGINA	95.2	100.0	94.5	94.6	100.0
SASKATOON	91.9	61.3	89.9	98.0	100.0
ALBERTA	87.0	78.4	86.0	87.7	92.9
ALBERTA CORE	87.3	78.9	86.3	88.0	92.2
CALGARY	95.0	93.6	98.7	92.7	97.4
EDMONTON	79.6	67.1	73.3	83.2	86.9
MEDICINE HAT	89.9	40.0	90.3	92.5	100.0
RED DEER	81.3	66.7	81.3	74.8	100.0
BRITISH COLUMBIA	69.3	64.5	68.7	68.4	77.9
KELOWNA	100.0	100.0	100.0	100.0	100.0
CAMPBELL RIVER/COURTNAY	97.6	NA	93.8	98.4	100.0
VANCOUVER CMA	65.5	62.9	65.1	63.9	76.0
VANCOUVER 1	62.2	76.2	61.7	58.3	76.2
VANCOUVER 2	63.8	60.9	60.5	62.7	81.9
VANCOUVER 3	71.3	52.4	69.0	75.3	68.7
VANCOUVER 4	72.3	78.4	81.3	66.6	72.0

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

1.2.3. Regional Results By Class of Trade (Table 10)

At the national level it was observed that retailers in independent convenience stores registered the lowest levels of compliance of any retail trade class. They were the only ones registering compliance below the national average and less than seventy percent. Gas retailers were next lowest, at about the national average. Retailers in all other classes of retail trade registered levels above, or just below eighty percent. Within trade classes, trends nationally were largely consistent with past levels.

The national findings reflect trends in the regions. In twenty-three of thirty cities visited, retailers in either independent convenience stores or gas stations reported compliance levels lower than those of other retailers in the city. However, gas and independent-store owners in several cities still reported compliance levels that, in relative terms, provide cause for encouragement:

- retailers in both types of establishment reported compliance levels above eighty percent in fifteen of thirty cities visited (50%);
- only in nine of thirty cities visited (30%) dd independent convenience store operators register compliance that was below the national average. Within the gas channel, the same occurred in only ten of thirty cities;
- within the independent convenience channel, compliance was below sixty percent in just four of thirty cities (Bathurst, Halifax, Montreal and Quebec City); within the gas channel, this was the case in only two cities (Halifax and Montreal);

Cities with higher overall compliance tended to report above average compliance levels across all, or the majority of, retail classes measured in these cities. The opposite is equally true, and the finding suggests that performance within one specific trade class is often symptomatic of chronically good or bad retailer discipline in the entire city or region.

Ten cities stand out as reporting the highest and most uniform levels of compliance across trade classes. These are:

- St. John's, NFLD
- Moncton
- Ottawa
- Thunder Bay
- Windsor
- Regina
- Saskatoon
- Calgary
- Kelowna
- Campbell River/Courtnay

Five cities report relatively lower, uniform levels of compliance across trade classes are:

- Halifax
- Montreal
- Quebec City
- Winnipeg
- Vancouver

Among the best performing classes of trade highlights include these findings:

- pharmacy retailers in all but one city where tobacco is still sold reported compliance levels of at least seventy percent--- most reported levels of ninety percent or better. The sole exception was in Vancouver, where pharmacy compliance was just below seventy percent, weighed down specifically by results in northeastern suburbs of the city including Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pit Meadows and New Westminster;
- grocery retailers in twenty-one of thirty cities reported compliance levels of at least eighty percent; none reported levels below sixty percent;
- retailers behind the tobacco counter in chain convenience stores reported compliance of eighty percent or higher in eighteen communities, while in only three communities was compliance less than sixty percent.

Table 10 - Weighted - Sales To Minors Compliance Results By City/Province/Region
% Retailers Unwilling To Sell By Class Of Trade – 2002

	% Unwilling to Sell (compliant) All Store Classes	% Unwilling to Sell (compliant) Chain Convenience	% Unwilling to Sell (compliant) Gas Stores/Kiosks	% Unwilling to Sell (compliant) Grocery	% Unwilling to Sell (compliant) Ind't Convenience	% Unwilling to Sell (compliant) Pharmacies
NATIONAL	71.2	76.1	72.1	79.0	67.2	83.4
NATIONAL CORE 25	70.3	74.8	71.1	78.4	66.3	83.1
ST. JOHN'S	98.2	93.3	100.0	95.0	97.8	100.0
CHARLOTTETOWN	75.6	33.3	81.0	81.8	75.7	70.0
NEW BRUNSWICK	81.6	100.0	76.5	82.1	82.5	NA
NEW BRUNSWICK CORE	73.1	100.0	69.2	76.2	74.3	NA
BATHURST	59.1	NA	70.6	100.0	47.4	NA
FREDERICTON	84.9	100.0	68.0	83.3	95.1	NA
MONCTON	98.5	100.0	94.4	100.0	100.0	NA
SAINT JOHN	73.1	100.0	69.0	66.7	75.4	NA
NOVA SCOTIA	63.8	68.6	60.8	86.4	62.2	NA
HALIFAX	54.1	58.3	54.7	72.7	51.7	NA
SYDNEY	86.1	90.9	75.8	100.0	88.1	NA
QUEBEC	57.0	56.2	56.9	66.5	55.5	NA
CHIC/JONQUIERE	80.4	70.0	88.6	76.5	79.0	NA
MONTREAL	54.2	53.0	53.5	64.0	53.0	NA
QUEBEC CITY	58.4	65.4	60.0	68.1	54.5	NA
SHERBROOKE	87.1	93.8	76.7	92.9	88.9	NA
ONTARIO	74.8	86.4	76.9	88.1	70.6	NA
ONTARIO CORE	73.6	86.0	75.9	87.7	69.5	NA
KINGSTON	88.7	70.6	84.2	88.9	96.8	NA
OTTAWA	97.6	94.1	93.5	100.0	100.0	NA
ST. CATHARINES	77.1	88.4	77.8	90.5	67.8	NA
SUDBURY	66.7	77.8	61.8	90.9	64.2	NA
THUNDER BAY	96.2	100.0	92.6	100.0	96.8	NA
TORONTO	67.8	82.2	71.0	84.6	63.5	NA
WINDSOR	97.9	98.2	97.7	100.0	97.8	NA
MANITOBA	65.2	61.6	64.8	76.9	61.2	72.5
BRANDON	84.9	75.0	89.5	100.0	70.0	100.0
WINNIPEG	63.6	60.8	61.8	74.5	60.6	70.5
SASKATCHEWAN	93.4	97.6	89.1	91.8	97.3	94.3
REGINA	95.2	100.0	93.0	100.0	94.6	95.7
SASKATOON	91.9	95.8	85.3	85.0	100.0	93.3
ALBERTA	87.0	88.6	86.8	91.6	82.9	90.9
ALBERTA CORE	87.3	89.9	86.6	92.4	83.3	90.5
CALGARY	95.0	98.8	98.6	97.8	89.0	98.1
EDMONTON	79.6	80.8	75.0	88.6	75.5	84.6
MEDICINE HAT	89.9	100.0	79.2	85.7	93.8	100.0
RED DEER	81.3	60.0	90.9	75.0	71.4	100.0
BRITISH COLUMBIA	69.3	76.8	72.6	74.3	65.2	72.3
KELOWNA	100.0	100.0	100.0	100.0	100.0	100.0
CAMPBELL RIVER/COURTNAY	97.6	100.0	100.0	100.0	92.9	100.0
VANCOUVER CMA	65.5	74.0	66.4	69.0	62.4	69.3
VANCOUVER 1	62.2	72.1	59.6	67.6	58.7	71.8
VANCOUVER 2	63.8	85.2	65.5	71.4	63.3	46.4
VANCOUVER 3	71.3	65.2	70.0	75.0	66.7	83.9
VANCOUVER 4	72.3	75.0	80.0	50.0	74.2	66.7

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

1.2.4. Regional Results By Gender of Minor (Table 11)

Teens of both genders went into stores in twenty-six of the thirty cities. The national data suggests that the influence of gender upon retailer selling behaviour is much weaker today than at any time in the past. This is an hypothesis supported by the regional findings. Among the twenty-six cities where both girls and boys tried to buy cigarettes, retailers in nine cities were more likely to refuse a sale to girls than boys, those in eight cities were more likely to refuse boys than girls and, in another nine cities, gender made no significant difference to the results at all. The result could not be more equally distributed.

The nine cities where underage girls were more likely to be refused a sale than underage boys include several in Atlantic Canada and the west. The nine are:

- Saint John
- Halifax
- Sydney
- Montreal
- Sherbrooke
- Kingston
- Winnipeg
- Edmonton
- Vancouver

The eight cities where underage boys were more likely to be refused a sale than underage girls include several cities across Ontario. The eight are:

- Charlottetown
- Fredericton
- Quebec City
- St. Catharines
- Sudbury
- Thunder Bay
- Toronto
- Windsor

The nine cities where gender of teen had no significant affect on retailer compliance were:

- St. John's, NFLD
- Moncton
- Chicoutimi/Jonquiere
- Ottawa
- Regina
- Saskatoon
- Calgary
- Kelowna
- Campbell River/Courtnay

Table 11- Weighted - Sales To Minors Compliance Results By City/Province/Region
% Retailers Unwilling To Sell By Gender Of Minor – 2002

	% Unwilling to Sell (compliant) All Teens	% Unwilling to Sell (compliant) When Teen Was: Female	% Unwilling to Sell (compliant) When Teen Was: Male
NATIONAL	71.2	73.2	69.1
NATIONAL CORE 25	70.3	72.6	67.9
ST. JOHN'S	98.2	98.2	98.2
CHARLOTTETOWN	75.6	68.1	83.2
NEW BRUNSWICK	81.6	82.7	80.1
NEW BRUNSWICK CORE	73.1	72.3	74.1
BATHURST	59.1	59.1	NA
FREDERICTON	84.9	75.7	94.4
MONCTON	98.5	100.0	95.8
SAINT JOHN	73.1	96.4	64.5
NOVA SCOTIA	63.8	67.1	61.4
HALIFAX	54.1	61.0	47.1
SYDNEY	86.1	93.7	83.3
QUEBEC	57.0	69.7	44.3
CHIC/JONQUIERE	80.4	80.9	78.8
MONTREAL	54.2	72.9	35.4
QUEBEC CITY	58.4	49.3	67.6
SHERBROOKE	87.1	93.7	84.9
ONTARIO	74.8	63.1	85.1
ONTARIO CORE	73.6	60.3	84.7
KINGSTON	88.7	94.2	83.3
OTTAWA	97.6	98.4	97.3
ST. CATHARINES	77.1	70.9	85.9
SUDBURY	66.7	61.3	81.2
THUNDER BAY	96.2	92.5	100.0
TORONTO	67.8	55.9	79.8
WINDSOR	97.9	91.5	100.0
MANITOBA	65.2	73.2	46.9
BRANDON	84.9	NA	84.9
WINNIPEG	63.6	73.2	33.7
SASKATCHEWAN	93.4	93.6	93.3
REGINA	95.2	97.1	94.5
SASKATOON	91.9	92.5	90.2
ALBERTA	87.0	92.5	79.9
ALBERTA CORE	87.3	92.5	79.7
CALGARY	95.0	94.4	96.7
EDMONTON	79.6	89.7	69.9
MEDICINE HAT	89.9	NA	89.9
RED DEER	81.3	NA	81.3
BRITISH COLUMBIA	69.3	79.9	58.2
KELOWNA	100.0	100.0	100.0
CAMPBELL RIVER/COURTNAY	97.6	97.6	97.5
VANCOUVER CMA	65.5	77.4	53.1
VANCOUVER 1	62.2	73.8	50.5
VANCOUVER 2	63.8	78.8	48.5
VANCOUVER 3	71.3	81.1	60.1
VANCOUVER 4	72.3	82.9	62.0

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

1.2.5. Regional Results By Gender of Clerk (Table 12)

In fourteen of thirty cities (47%), women were more likely than men to refuse a tobacco sale to underage teens. Only in three cities (10%) were men more likely than women to refuse a sale. In thirteen other cities, no significant difference was noted between the likelihood of male or female clerks to refuse a sale.

Below is the list of cities where the largest compliance gap (ten percentage points or better) was found between clerks of either gender. Seven of thirty cities make the list. All show compliance stronger for woman behind the counter than for men:

- Sherbrooke (male compliance 68.2% vs female compliance 97.4%)
- Winnipeg (male compliance 53.6% vs female compliance 71.1%)
- Red Deer (male compliance 71.0% vs female compliance 86.3%)
- Saskatoon (male compliance 82.6% vs female compliance 94.7%)
- Vancouver (male compliance 59.2% vs female compliance 70.8%)
- Sydney (male compliance 78.9% vs female compliance 89.9%)
- Sudbury (male compliance 60.0% vs female compliance 70.1%)

Only Thunder Bay, Windsor and Edmonton registered substantially higher compliance (i.e., by more than five percentage points) when men were behind the tobacco counter than when women were.

Table 12 - Weighted - Sales To Minors Compliance Results By City/Province/Region
% Retailers Unwilling To Sell By Gender of Clerk – 2002

	% Unwilling to Sell (compliant) All Stores	% Unwilling to Sell (compliant) When Clerk is: Female	% Unwilling to Sell (compliant) When Clerk is: Male
NATIONAL	71.2	73.2	68.6
NATIONAL CORE 25	70.3	72.4	67.7
ST. JOHN'S	98.2	98.2	98.1
CHARLOTTETOWN	75.6	76.1	74.6
NEW BRUNSWICK	81.6	82.0	80.7
NEW BRUNSWICK CORE	73.1	74.0	71.3
BATHURST	59.1	61.5	53.0
FREDERICTON	84.9	84.3	86.4
MONCTON	98.5	100.0	96.2
SAINT JOHN	73.1	74.2	71.1
NOVA SCOTIA	63.8	68.7	57.2
HALIFAX	54.1	57.6	50.0
SYDNEY	86.1	89.9	78.9
QUEBEC	57.0	58.6	54.3
CHIC/JONQUIERE	80.4	79.2	82.2
MONTREAL	54.2	55.6	51.9
QUEBEC CITY	58.4	59.3	56.6
SHERBROOKE	87.1	97.4	68.2
ONTARIO	74.8	76.4	73.4
ONTARIO CORE	73.6	75.2	72.3
KINGSTON	88.7	92.0	86.1
OTTAWA	97.6	99.2	96.6
ST. CATHARINES	77.1	77.3	76.7
SUDBURY	66.7	70.1	60.0
THUNDER BAY	96.2	93.7	100.0
TORONTO	67.8	70.6	65.7
WINDSOR	97.9	94.8	100.0
MANITOBA	65.2	72.3	56.0
BRANDON	84.9	87.1	82.2
WINNIPEG	63.6	71.1	53.6
SASKATCHEWAN	93.4	95.5	88.5
REGINA	95.2	96.6	92.7
SASKATOON	91.9	94.7	82.6
ALBERTA	87.0	86.1	88.8
ALBERTA CORE	87.3	86.1	89.5
CALGARY	95.0	95.3	94.5
EDMONTON	79.6	77.8	83.7
MEDICINE HAT	89.9	92.6	83.1
RED DEER	81.3	86.3	71.0
BRITISH COLUMBIA	69.3	75.1	62.3
KELOWNA	100.0	100.0	100.0
CAMPBELL RIVER/COURTNAY	97.6	100.0	91.3
VANCOUVER CMA	65.5	70.8	59.5
VANCOUVER 1	62.2	65.7	59.2
VANCOUVER 2	63.8	74.4	50.5
VANCOUVER 3	71.3	73.7	67.1
VANCOUVER 4	72.3	75.7	68.3

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

1.2.6. Regional Results By Proximity To School &/or Mall (Table 13)

Across our entire sample, retailers in stores closest to schools or malls appeared more inclined to comply with tobacco sales-to-minors legislation than other retailers. At the regional level, the stores' proximity to schools or malls seldom translates into higher compliance rates. Actually, there are far more cities (19 of thirty, or 63%) where compliance is the same or lower for stores close to school or malls than where the opposite is true. The weighted national findings are more reflective of the situation in a few larger communities than that in the majority of cities and towns. Consider these facts:

- retailer compliance for stores in proximity to schools/malls was higher in eleven of thirty cities surveyed, or fewer than half. Toronto, Vancouver and Edmonton are included among these cities. All are larger centers, the results from which weigh more heavily on the weighted national average;

- in fourteen cities (i.e., just less than half the thirty), the location of stores appeared to have no significant affect on retailer compliance levels;

- in another five cities, we found compliance to be lower for stores closest to schools or malls. These are: Halifax, Sherbrooke, St. Catharines, Brandon and Red Deer. Except for Halifax, all are small communities within their respective provinces, the results from which weigh less heavily on the weighted national average.

Table 13 - Weighted - Sales To Minors Compliance Results By City/Province/Region
% Retailers Unwilling To Sell By Proximity to School &/Or Mall – 2002

	% Unwilling to Sell (compliant) All Stores	% Unwilling to Sell (compliant) Stores: Near a School or Mall	% Unwilling to Sell (compliant) Stores: All Other Stores
NATIONAL	71.2	74.0	68.8
NATIONAL CORE 25	70.3	73.2	68.0
ST. JOHN'S	98.2	100.0	97.6
CHARLOTTETOWN	75.6	79.3	73.6
NEW BRUNSWICK	81.6	87.8	73.5
NEW BRUNSWICK CORE	73.1	80.2	66.5
BATHURST	59.1	71.7	50.9
FREDERICTON	84.9	84.4	85.4
MONCTON	98.5	98.0	100.0
SAINT JOHN	73.1	81.4	62.2
NOVA SCOTIA	63.8	57.9	67.0
HALIFAX	54.1	50.6	56.5
SYDNEY	86.1	92.1	84.5
QUEBEC	57.0	58.3	56.3
CHIC/JONQUIERE	80.4	87.7	78.2
MONTREAL	54.2	55.6	53.5
QUEBEC CITY	58.4	56.7	59.7
SHERBROOKE	87.1	84.6	91.0
ONTARIO	74.8	76.5	73.2
ONTARIO CORE	73.6	75.5	71.9
KINGSTON	88.7	92.6	83.6
OTTAWA	97.6	99.1	96.9
ST. CATHARINES	77.1	72.6	83.2
SUDBURY	66.7	72.6	58.0
THUNDER BAY	96.2	97.3	93.5
TORONTO	67.8	71.9	63.9
WINDSOR	97.9	96.2	98.8
MANITOBA	65.2	63.9	67.5
BRANDON	84.9	82.8	88.9
WINNIPEG	63.6	62.2	65.8
SASKATCHEWAN	93.4	94.2	92.0
REGINA	95.2	96.4	93.2
SASKATOON	91.9	92.5	90.4
ALBERTA	87.0	88.4	85.9
ALBERTA CORE	87.3	89.0	85.8
CALGARY	95.0	95.4	94.6
EDMONTON	79.6	82.0	77.7
MEDICINE HAT	89.9	94.9	88.1
RED DEER	81.3	69.4	87.9
BRITISH COLUMBIA	69.3	75.7	63.0
KELOWNA	100.0	100.0	100.0
CAMPBELL RIVER/COURTNAY	97.6	97.6	97.5
VANCOUVER CMA	65.5	71.8	59.6
VANCOUVER 1	62.2	69.0	56.9
VANCOUVER 2	63.8	72.8	55.2
VANCOUVER 3	71.3	74.4	65.9
VANCOUVER 4	72.3	74.9	71.1

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

1.2.7. Regional Results By Presence Or Not Of Adults In Store (Table 14)

At the national level, the difference between retailer rates of refusal when adult customers were present in store compared to when they were not is statistically insignificant. The same is true of results from individual communities. Certainly, the findings vary enough across communities that, any hypothesis regarding retailer behaviour based on the presence or not of other customers is unable on its own to explain the results.

Among retailers in thirty cities visited, those in twelve (i.e., fewer than half) proved more likely to refuse a sale when adults were also present at the tobacco counter than when they were not; those in eighteen cities were either as likely, or less likely to refuse a sale under the same circumstances. However, in the overwhelming majority of all these situations, any measured difference was within the statistical margin of error, and therefore, inconclusive.

Table 14 - Weighted - Sales To Minors Compliance Results By City/Province/Region

	% Unwilling to Sell (compliant) All Stores	% Unwilling to Sell (compliant): Stores With Adult Customers	% Unwilling to Sell (compliant): Stores Without Adult Custom ers
NATIONAL	71.2	70.6	72.3
NATIONAL CORE 25	70.3	69.7	71.6
ST. JOHN'S	98.2	98.8	95.9
CHARLOTTETOWN	75.6	73.8	81.1
NEW BRUNSWICK	81.6	81.5	81.9
NEW BRUNSWICK CORE	73.1	70.1	79.3
BATHURST	59.1	56.2	71.9
FREDERICTON	84.9	82.1	88.2
MONCTON	98.5	100.0	91.5
SAINT JOHN	73.1	73.2	72.7
NOVA SCOTIA	63.8	64.6	62.7
HALIFAX	54.1	53.4	55.0
SYDNEY	86.1	90.2	80.2
QUEBEC	57.0	53.6	63.4
CHIC/JONQUIERE	80.4	76.3	87.1
MONTREAL	54.2	49.9	61.9
QUEBEC CITY	58.4	58.2	58.8
SHERBROOKE	87.1	87.8	86.0
ONTARIO	74.8	73.3	77.3
ONTARIO CORE	73.6	72.0	76.5
KINGSTON	88.7	88.9	88.5
OTTAWA	97.6	97.7	97.3
ST. CATHARINES	77.1	78.8	75.2
SUDBURY	66.7	81.2	46.5
THUNDER BAY	96.2	96.2	96.2
TORONTO	67.8	66.6	70.4
WINDSOR	97.9	96.4	99.2
MANITOBA	65.2	67.0	61.1
BRANDON	84.9	96.5	72.2
WINNIPEG	63.6	65.2	59.5
SASKATCHEWAN	93.4	94.4	90.8
REGINA	95.2	96.7	92.4
SASKATOON	91.9	92.8	88.5
ALBERTA	87.0	88.7	83.0
ALBERTA CORE	87.3	88.8	83.7
CALGARY	95.0	96.3	91.2
EDMONTON	79.6	80.4	77.9
MEDICINE HAT	89.9	91.8	84.6
RED DEER	81.3	87.0	67.7
BRITISH COLUMBIA	69.3	70.9	66.1
KELOWNA	100.0	100.0	100.0
CAMPBELL RIVER/COURTNAY	97.6	98.4	94.4
VANCOUVER CMA	65.5	66.8	63.1
VANCOUVER 1	62.2	61.2	63.8
VANCOUVER 2	63.8	64.2	62.9
VANCOUVER 3	71.3	79.3	56.3
VANCOUVER 4	72.3	69.6	76.4

% Retailers Unwilling To Sell Based On Presence Of Adult Customers In Store – 2002

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

1.3. Results By Presence of Operation ID Signs

This year's survey of retailer compliance with tobacco sales-to-minors legislation identified stores with and without "Operation ID" point-of-sale merchandise. Compliance levels were measured between participating and non-participating retailers. The results of our findings nationally and by region are reported in this section of our report.

"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 preempt 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 tobacco.[4]

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.

In one province, Saskatchewan, the recently adopted *Tobacco Control Act* effectively prohibits retailers from posting *Operation ID* signs.

Participating Retailers

Slightly more than half (54.5%) of the 5,550 stores we visited were participants in the "Operation ID" program, posting all or some of the point-of-sale materials. We found participants to some degree in all cities visited, including Regina and Saskatoon, across which an estimated fourteen percent of retailers were in violation of Saskatchewan's new tobacco law (11% in Regina and 16% in Saskatoon). Nationally, the fact that retailers split about evenly between those with and without "Operation ID" signs permits reliable comparisons to be drawn with respect to each retail group's compliance with the sales-to-minors provisions of the tobacco laws. At the regional level, comparisons should be viewed more cautiously depending on the sample sizes between groups in each city.

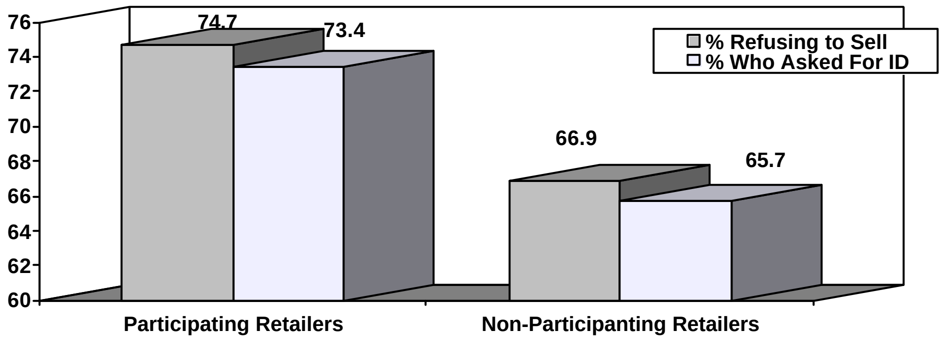
Overall Sales-to-Minors Compliance Rates

At the national level, retailers participating in "Operation ID" were significantly more likely than those not participating to refuse a tobacco sale to minors. Participating retailers registered compliance of 74.7% compared with 66.9% for non-participating retailers.[5] The respective levels of compliance in each group correlate directly with the percentage of retailers asking for ID:

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

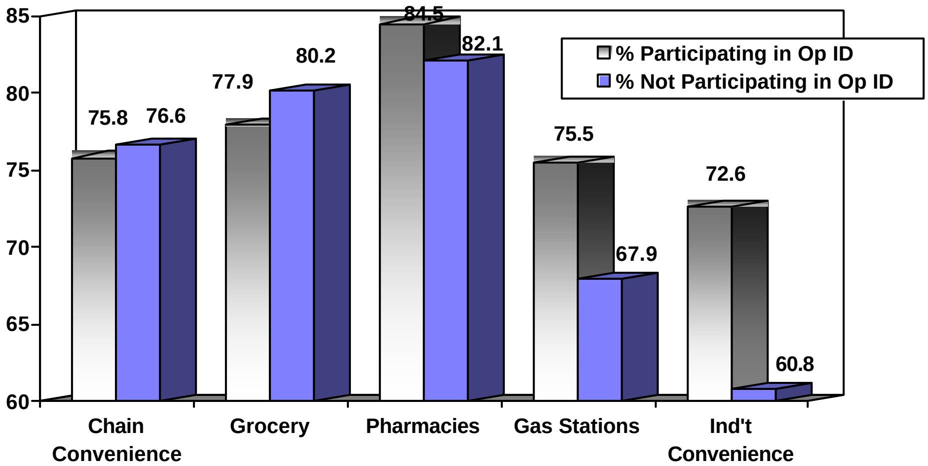
[5] Statistically, given the sample sizes involved and the compliance rate, any difference nationally of 1.6 percentage point in either direction (up or down) suggests there is a high probability that the difference in compliance between participating and non-participating retailers is meaningful.

Chart 9 – Weighted - National
Sales-To-Minors Compliance Based On Retailer Participation In *Operation ID*



"Operation ID" did not influence the behaviour of all retailers equally. No statistically meaningful difference in compliance was recorded between participating and non-participating retailers in chain convenience stores, grocery supermarkets or pharmacies. Where the retailer support of "Operation ID" may have affected behavioural change is among retailers in gas stations/kiosks and independent convenience stores, i.e., "mom and pop" outlets. Of those gas station retailers participating in the program, 75.5% refused to sell to our teens compared with 67.9% of retailers not participating. Among independent convenience retailers the compliance rate was 72.6% for those participating compared with 60.8% for those not. Owing to better compliance within these two retail groups, compliance levels among retailers participating in "Operation ID" are more consistent between trade classes than is the case for non-participating retailers. However, the net contribution of "Operation ID" in reducing tobacco sales to youth remains open to debate. Despite the program's existence, the total percentage of gas and independent convenience retailers refusing to sell is no higher this year than in 2000, before "Operation ID" was in place.

Chart 10 – Weighted – National
Sales-To-Minors Compliance Based On Retailer Participation In *Operation ID*
By Class of Trade



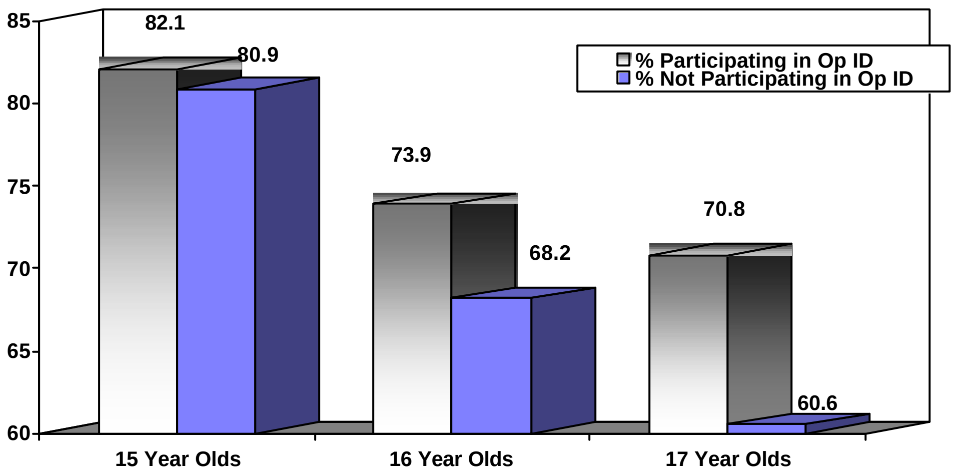
Regionally, compliance results were also mixed. Of the thirty cities we visited, we were able to draw comparisons between stores participating and those not participating in "Operation ID" in twenty-nine of them. (In Moncton, every store we visited carried an "Operation ID" sign, so no comparison is possible.) Of the twenty-nine cities, participating retailers refused a sale more often than non-participating ones in sixteen cities (55%), but only in eleven cities (of the twenty-nine) was the compliance difference large enough to be considered meaningful with any degree of confidence. Among these eleven cities with statistically more significant results, participating retailers were more likely than non-participating ones to refuse a sale in seven of them (64%), (Table 15).

Similar inconsistencies appear across regions within the various classes of trade. In gas stations/kiosks and independent convenience stores, where nationally, the presence of "Operation ID" appeared to influence compliance positively, the same result was not repeated in every city. Of twelve cities where the compliance gap between participating and non-participating retailers in gas stores is considered significant, retailers participating in "Operation ID" refused a sale more often than non-participants in six of them (50%). Among retailers in independent convenience stores, the ratio was sixty percent -- of ten cities where the gap in independent convenience stores was meaningful, participating retailers refused a sale more often than non-participants in six of them. (For details of these results, refer to related tables in the APPENDIX to this report.)

Along other dimensions, compliance levels were higher nationally for participating retailers than non-participating ones across teens of all ages. However, the compliance difference when fifteen-year olds attempted to buy tobacco was small and within the statistical margin of error. As such, when youngest teens were involved, Operation ID made no measurable difference to compliance levels.

Measurable differences did exist when older teens attempted to buy tobacco, and in particular, when seventeen year olds were involved. Among this age group, compliance was a full ten points higher in "Operation ID" participating stores than it was in non-participating stores (70.8% versus 60.6%, respectively). Higher sales-to-minors compliance involving minors of all ages coincides directly with retailer willingness to ask for proper ID. The "Operation ID" program appears to contribute to retailers demanding proof of age more equitably between teenage age groups. The gap in retailer compliance levels between youngest and oldest teens is far less among participating retailers than it is among non-participants. Nevertheless, in either group, compliance rates continue to vary inversely with the age of the teen trying to make a tobacco buy. Whether or not retailers endorsed "Operation ID", older teens had an easier time attempting to buy cigarettes than younger ones did.

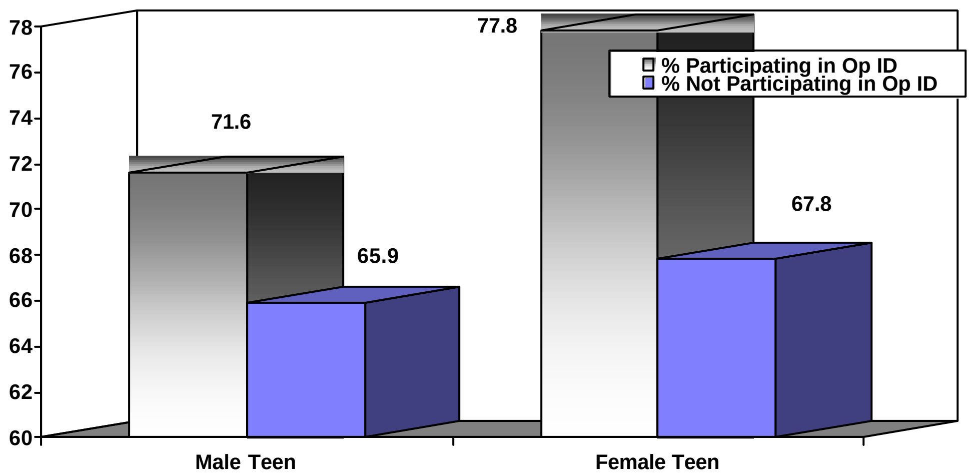
Chart 11 – Weighted – National
Sales-To-Minors Compliance By Age of Teen
Based On Retailer Participation In *Operation ID*



% Asked ID	**74.5**	**70.5**	**75.3**	**67.9**	**71.6**	**62.7**

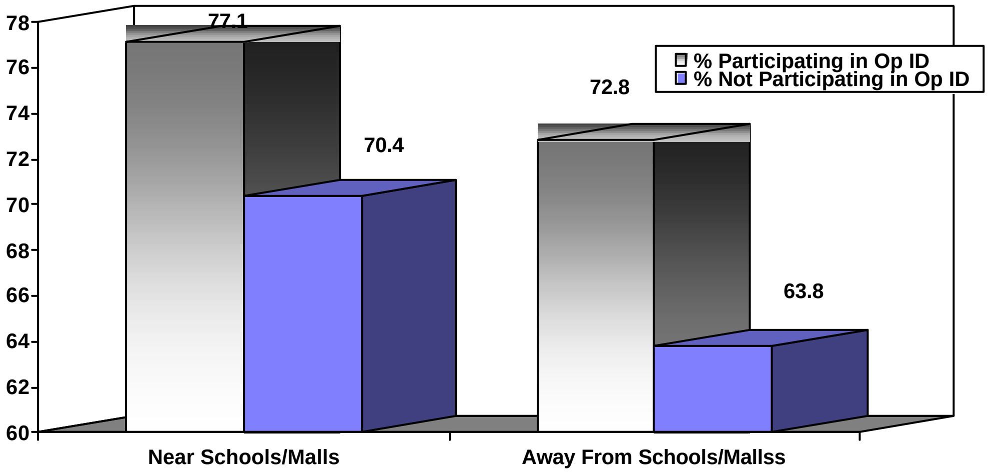
Non-participating retailers were about as likely to refuse a sale to young girls as they were to young boys, while participating retailers were far more likely to refuse young boys. Regardless of teen gender, compliance was measurably higher among retailers participating in "Operation ID" than those not participating.

Chart 12 – Weighted – National
Sales-To-Minors Compliance By Gender of Teen
Based On Retailer Participation In *Operation ID*



Compliance was also higher among participating retailers whether or not their stores were located in close proximity to schools or malls. Among program participants, the measured difference in compliance between stores located near and away from schools or malls is within the statistical margin of error and not significant. Conversely, non-participating retailers were less likely to refuse underage teens a tobacco sale if their stores were away from schools and malls than if they were closer to such locations. “Operation ID” appears to level the field between stores in different locations.

Chart 13 – Weighted – National
Sales-To-Minors Compliance Based On Proximity to School/Malls & Retailer Participation In *Operation ID*



The final verdict regarding “Operation ID” remains unclear. Obviously, the fact that results are not consistently in the same direction across all dimensions, in all cities or in all classes of trade means the current data is far from conclusive. Both proponents and detractors of the program will find elements in the data supportive of their arguments. The very least that can be said is that further research is needed before this debate is over.

Table 15 - Weighted - Sales To Minors Compliance Results By City/Province/Region Based on Retailer Participation in Operation ID

	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	Likley That Change Is Statistically Significant (Yes/No)
NATIONAL	71.2	66.9	74.7	7.8	YES
NATIONAL CORE 25	70.3	66.3	73.7	7.4	YES
ST. JOHN'S	98.2	100.0	98.1	-1.9	NO
CHARLOTTETOWN	75.6	74.9	76.2	1.3	NO
NEW BRUNSWICK	81.6	64.2	87.6	23.4	YES
NEW BRUNSWICK CORE	73.1	64.2	78.7	14.5	YES
BATHURST	59.1	60.2	50.0	-10.2	NO
FREDERICTON	84.9	100.0	84.7	-15.3	YES
MONCTON	98.5	NA	98.5	NA	NA
SAINT JOHN	73.1	69.4	75.0	5.6	YES
NOVA SCOTIA	63.8	61.7	66.4	4.7	YES
HALIFAX	54.1	56.4	50.0	-6.4	YES
SYDNEY	86.1	85.1	86.5	1.4	NO
QUEBEC	57.0	49.8	60.9	11.1	YES
CHIC/JONQUIERE	80.4	85.5	77.8	-7.7	YES
MONTREAL	54.2	44.0	59.0	15.0	YES
QUEBEC CITY	58.4	44.7	65.5	20.8	YES
SHERBROOKE	87.1	87.7	75.0	-12.7	NO
ONTARIO	74.8	65.8	82.7	16.9	YES
ONTARIO CORE	73.6	64.2	82.0	17.8	YES
KINGSTON	88.7	88.0	89.8	1.8	NO
OTTAWA	97.6	94.4	98.6	4.2	NO
ST. CATHARINES	77.1	74.3	80.4	6.1	NO
SUDBURY	66.7	61.3	71.8	10.5	YES
THUNDER BAY	96.2	100.0	96.2	-3.8	NO
TORONTO	67.8	61.8	74.9	13.1	YES
WINDSOR	97.9	81.7	99.2	17.5	NO
MANITOBA	65.2	64.7	65.8	1.1	NO
BRANDON	84.9	82.6	87.3	4.7	NO
WINNIPEG	63.6	63.2	64.0	0.8	NO
SASKATCHEWAN	93.4	93.6	92.4	-1.2	NO
REGINA	95.2	94.6	100.0	5.4	YES
SASKATOON	91.9	92.7	88.0	-4.7	NO
ALBERTA	87.0	87.9	86.2	-1.7	NO
ALBERTA CORE	87.3	88.1	86.5	-1.6	NO
CALGARY	95.0	96.2	93.9	-2.3	NO
EDMONTON	79.6	79.7	79.5	-0.2	NO
MEDICINE HAT	89.9	96.0	77.7	-18.3	YES
RED DEER	81.3	77.8	82.3	4.5	NO
BRITISH COLUMBIA	69.3	67.7	71.2	3.5	NO
KELOWNA	100.0	100.0	100.0	0.0	NO
CAMPBELL RIVER/COURTNAY	97.6	95.4	100.0	4.6	YES
VANCOUVER CMA	65.5	66.5	64.0	-2.5	NO
VANCOUVER 1	62.2	63.4	60.4	-3.0	NO
VANCOUVER 2	63.8	69.3	55.6	-13.7	YES
VANCOUVER 3	71.3	66.0	79.0	13.0	YES
VANCOUVER 4	72.3	75.9	66.0	-9.9	YES

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

PART A (continued)
TOBACCO SALES-TO-MINORS LEGISLATION

Section 2: Posting Of Age/Health Advisory Signs

This section of the report summarizes 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. In addition, the legislation clearly stipulates the manner in which signs must be posted and the location on the premises (windows, doors, at tobacco counters, etc.) where each sign must be displayed.

Since the last measurement in 2000, tobacco laws in Saskatchewan changed. Elsewhere, the mandatory sign requirements are the same in 2002 as they were for the previous survey. Owing to the different requirements, the latest measurements nationally and for Saskatchewan do not compare directly with those of previous surveys.

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;
- that these signs were present at or *near* every required location on the premises and;
- that, in Saskatchewan, in addition to the above, no *Operation ID* signs were present on the premises;
- that, in Quebec, Manitoba and Alberta, signs were posted in both official languages;

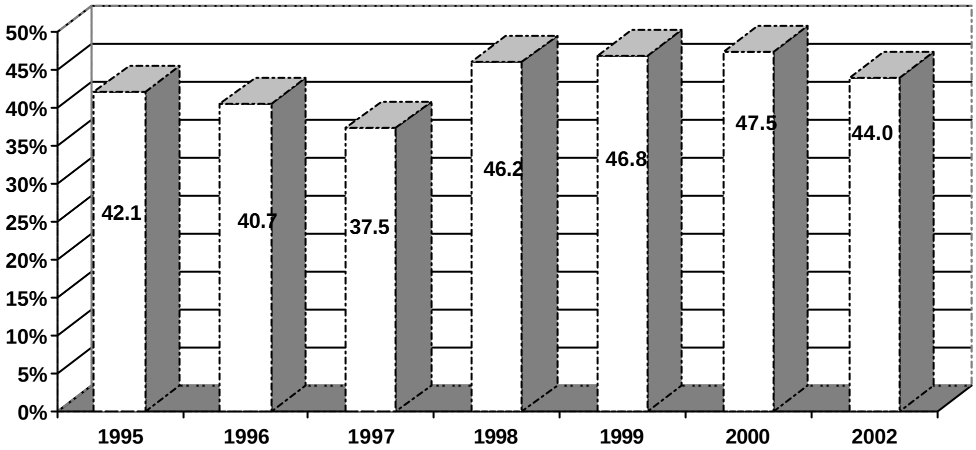
The presence of signs designed to be visible only to the cashier, or those designated as optional, were not measured and do not factor into the results. We were unconcerned with signs not posted exactly where the law stipulated, provided they were in close proximity to the suggested location and visible 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–– if the official government sign we were instructed to look for was not itself visible. In Saskatchewan, the law clearly prohibits the presence of any tobacco signs other than those specifically mandated under the province's *Tobacco Control Act* or the *Federal Tobacco Act*. In this province, if a retailer posted these signs along with any other unauthorized sign, the retailer was considered non-compliant with the law.

2.1. Overall Compliance - National

Nationally, the percentage of retailers complying fully with the sign provisions of the tobacco laws was 44.0%. This figure represents the weighted percentage of retailers across all thirty cities visited that met every sign compliance condition we measured. Across the core twenty-five cities that we measured for previous studies, weighted compliance is slightly lower (43.4%, Table 16). In either case, current levels are below those last recorded in 2000 and full compliance with all the provisions of the sign laws is lower than it has been since 1997.

Chart 14 - Weighted - National
% Retailers In Compliance With Signs Under Federal & Provincial Tobacco Legislation - All Store Types



**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.*

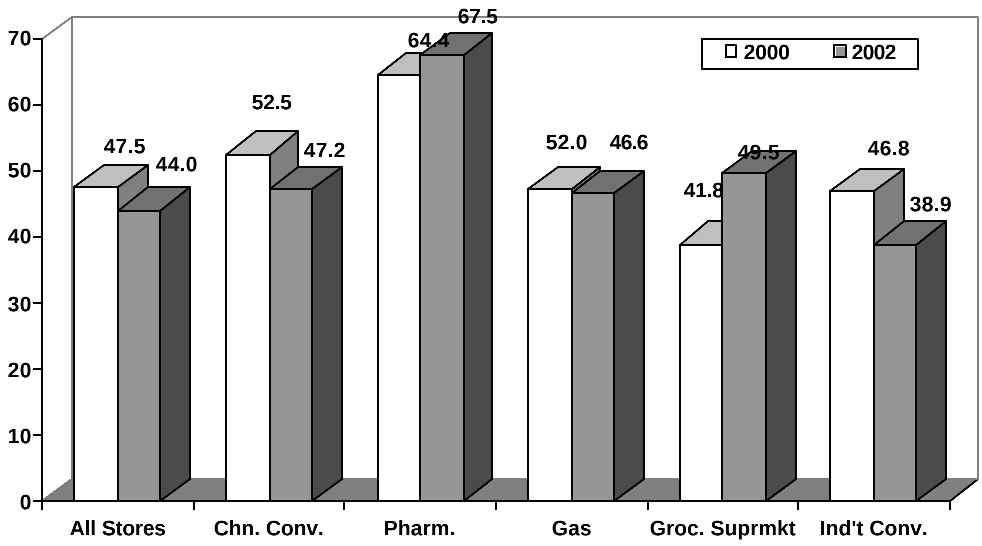
The figures in the chart above reflect the national percentage of retailers who post *every* mandatory sign at *every* designated location on their premises, as proscribed under federal or provincial laws. In New Brunswick, for example, there are as many as three mandatory signs requiring posting. Each sign has a designated location. If retailers failed to post even one of these signs in even one location, 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. In Saskatchewan, retailers who posted all the mandatory signs, but who also posted other signs not authorized under the law would be excluded from the total. 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 eight different laws and numerous combinations of signs, their language and their location.

2.2. Compliance by Class of Trade (Table 16)

Sign compliance levels increased significantly across grocery supermarkets since 2000, but decreased significantly in independent convenience stores. The sign compliance rate in other classes of trade is holding at levels that are within the statistical margin of error and, therefore, essentially comparable with 2000 levels.

Independent convenience stores report the lowest level of compliance (38.9%). The figure is considerably lower than that reported by any other retail class of trade. Sign compliance remains highest in pharmacies.

Chart 15 - Weighted - National
% Retailers In Full Compliance With Posting of Signs
By Class of Trade - 2002 vs 2000



Across regions, the following highlights are noted by class of trade:

- in independent convenience stores, sign compliance was below the national average in seven of thirty cities surveyed (23%). These cities were Halifax, Chicoutimi/Jonquiere, Ottawa, St. Catharines, Sudbury, Toronto and Medicine Hat. Except for Chicoutimi/Jonquiere, the majority of retailers in these cities were at least in partial compliance with the sign laws. Their poor showing is due to their failure to comply equally with every aspect of the sign requirements;
- in pharmacies, sign compliance was above the national average for compliance in these stores (67.5%) in nine of thirteen cities where pharmacies still sold tobacco. Below average compliance was reported in Winnipeg (43.2%), Regina (39.1%), Saskatoon (26.7%) and Medicine Hat (30.0%). In Winnipeg, the low result is exacerbated by the failure to post signs properly, or at all locations. In Saskatchewan, while most pharmacies carried the age restriction sign, several also carried other signs not authorized under provincial law. The result in Medicine Hat is typical of overall results in that city and is contributed to by the lack of bilingual signage.

- chain convenience stores in eighteen of thirty cities posted compliance with the sign laws above the national average for this trade class (47.2%). Included among these cities were Charlottetown, Fredericton, Moncton, Sherbrooke, Kelowna and Campbell River/Courtnay, all of which posted 90% compliance or better;
- the mandated tobacco age advisory and /or health warning signs were up in a large majority of gas convenience stores in St. John's, Charlottetown, New Brunswick and Alberta. Across Quebec, just over fifty percent (51.7%) of gas stores had posted the single age advisory sign required in that province. The figure in Winnipeg is 51.5% and across Saskatchewan, 52.5%. For the whole of Ontario, only 17.9% of gas stores had the three signs that that province demands;
- we found six cities where every supermarket grocery stores was in full compliance with the sign laws of their province. These were St. John's, Charlottetown, Bathurst, Fredericton, Red Deer and Kelowna. Two other cities reported full compliance in at least ninety percent of grocery supermarkets: Sherbrooke (92.9%) and Halifax (90.9%).

Table 16 - Weighted – Full Sign Compliance By Class of Trade
% Retailers Posting All Signs in All Places As Required - 2002

	All Stores	Gas Stations/ Kiosks	Independent Convenience	Chain Convenience	Pharmacies	Grocery
NATIONAL	44.0	46.6	38.9	47.2	67.5	49.5
NATIONAL CORE 25	43.4	46.2	37.9	46.7	67.0	49.2
ST. JOHN'S	95.9	95.0	95.7	93.3	96.6	100.0
CHARLOTTETOWN	100.0	100.0	100.0	100.0	100.0	100.0
NEW BRUNSWICK	78.3	82.2	75.7	81.5	NA	78.6
NEW BRUNSWICK CORE	69.7	77.1	64.5	33.3	NA	81.0
BATHURST	71.9	88.2	57.9	NA	NA	100.0
FREDERICTON	90.4	92.0	87.8	100.0	NA	100.0
MONCTON	95.4	94.4	100.0	90.0	NA	71.4
SAINT JOHN	53.8	55.2	52.5	0.0	NA	66.7
NOVA SCOTIA	36.2	28.3	35.1	48.6	NA	66.3
HALIFAX	31.7	25.0	29.9	37.5	NA	90.9
SYDNEY	46.4	36.4	47.8	72.7	NA	41.7
QUEBEC	53.9	51.7	53.1	57.4	NA	58.3
CHIC/JONQUIERE	11.9	14.3	11.1	10.0	NA	11.8
MONTREAL	54.7	50.5	55.0	55.0	NA	62.0
QUEBEC CITY	51.4	55.7	47.2	71.2	NA	46.4
SHERBROOKE	92.9	96.7	91.1	93.8	NA	92.9
ONTARIO	15.3	17.9	13.5	21.9	NA	11.6
ONTARIO CORE	10.9	13.8	9.7	14.7	NA	6.6
KINGSTON	76.2	78.9	74.2	70.6	NA	88.9
OTTAWA	26.3	29.0	26.5	27.5	NA	13.3
ST. CATHARINES	25.6	13.0	25.3	37.7	NA	23.8
SUDBURY	17.2	20.6	13.2	33.3	NA	18.2
THUNDER BAY	78.2	81.5	80.6	66.7	NA	50.0
TORONTO	2.8	4.0	2.9	0.0	NA	2.9
WINDSOR	74.3	83.7	69.6	82.1	NA	57.1
MANITOBA	49.8	53.3	50.0	51.4	47.1	40.4
BRANDON	62.9	68.4	60.0	25.0	100.0	33.3
WINNIPEG	48.7	51.5	49.3	52.9	43.2	41.2
SASKATCHEWAN	44.6	52.5	50.7	26.6	31.9	45.8
REGINA	48.6	57.9	51.4	17.6	39.1	52.9
SASKATOON	41.1	47.1	50.0	33.3	26.7	40.0
ALBERTA	74.5	77.5	71.2	80.9	72.3	74.0
ALBERTA CORE	74.0	77.3	70.9	81.0	71.3	72.8
CALGARY	78.8	80.8	74.7	84.9	76.9	84.4
EDMONTON	74.2	81.6	71.7	79.5	70.5	67.1
MEDICINE HAT	22.9	20.8	18.8	25.0	30.0	28.6
RED DEER	85.7	81.8	78.6	80.0	100.0	100.0
BRITISH COLUMBIA	64.0	67.6	58.7	66.2	73.2	67.8
KELOWNA	88.7	79.5	88.5	100.0	100.0	100.0
CAMPBELL RIVER/COURTNAY	66.4	56.5	57.1	100.0	77.8	81.8
VANCOUVER CMA	61.9	66.8	57.1	62.2	71.3	62.7
VANCOUVER 1	59.3	65.4	54.0	55.8	76.9	54.1
VANCOUVER 2	63.6	60.3	58.3	88.9	67.9	71.4
VANCOUVER 3	66.0	76.7	61.7	47.8	71.0	62.5
VANCOUVER 4	60.3	60.0	64.5	50.0	44.4	64.3

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

2.3. Overall Compliance by Region

Lower sign compliance rates nationally are the result of decreases in thirteen of twenty-five core cities in which the latest findings can be compared with results in 2000. The straight average of the drop across all sixteen cities is 17.0 points. However, the largest and most significant declines (i.e., double-digit decreases) are from seven cities, where the straight average of the drop is 26.7 points. These cities are:

- Medicine Hat (-39.4 points)
- Saskatoon (-38.3 points)
- Ottawa (-36.9 points)
- Sudbury (-25.5 points)
- Halifax (-19.8 points)
- Saint John (-14.7 points)
- Vancouver (-12.5 points)

These communities represent several provinces and are legislated under a variety of tobacco laws. In all cases, the majority of retailers in each of these cities were found to have in place at least one sign under the law. The lower levels are the result of retailers in these cities failing to comply with all aspects of the law, including the placement of signs in the manner proscribed (eg: at all locations, or in both official languages), or the placement of ancillary signs in those provinces where the law requires that more than one type of sign be posted.

In twelve of twenty-five core cities, sign compliance rates increased. The straight average of the increase across all twelve cities is 16.9 points, but the largest gains occurred in half the cities. These cities are:

- Sherbrooke (+52.2 points)
- St. John's (+51.2 points)
- Bathurst (+28.4 points)
- Calgary (+21.9 points)
- Quebec City (+12.4 points)
- Sydney (+10.6 points)

All but Bathurst and Sydney are cities located in provinces where the posting of only one sign is mandated by law. In these communities the improvement is directly the result of more retailers now than in 2000 complying with the sign provisions.

Highest compliance was in seven cities where the percentage of stores in full compliance was eighty-five or better:

- Charlottetown (100.0%)
- St. John's (95.9%)
- Moncton (95.4%)
- Sherbrooke (92.9%)
- Fredericton (90.4%)
- Kelowna (88.7%)
- Red Deer (85.7%)

Lowest compliance was in eight cities where the percentage of stores in full compliance was below the national average (44.0%):

- Toronto (2.8%)
- Chicoutimi/Jonquiere (11.9%)
- Sudbury (17.2%)
- Medicine Hat (22.9%)
- St. Catharines (25.6%)
- Ottawa (26.3%)
- Halifax (31.7%)
- Saskatoon (41.1%)

Half the cities on this list are in Ontario, where the law requires that three different signs be posted. The great majority of retailers in each of these communities did have two of three signs posted, but relatively fewer posted the "No Smoking" sign that Ontario law also requires.

Table 17 - % Retailer Sign Compliance By Region
All Store Types – 2002 vs 2000 Results (Weighted)

	2000 Results	2002 Results	Net Change
NATIONAL	NA	44.0	NA
NATIONAL CORE 25	47.5	43.4	-4.1
ST. JOHN'S	44.7	95.9	51.2
CHARLOTTETOWN	97.5	100.0	2.5
NEW BRUNSWICK	NA	78.3	NA
NEW BRUNSWICK CORE	72.6	69.7	-2.9
BATHURST	43.5	71.9	28.4
FREDERICTON	87.2	90.4	3.2
MONCTON	NA	95.4	NA
SAINT JOHN	68.5	53.8	-14.7
NOVA SCOTIA	47.8	36.2	-11.6
HALIFAX	51.5	31.7	-19.8
SYDNEY	35.8	46.4	10.6
QUEBEC	52.3	53.9	1.6
CHIC/JONQUIERE	2.3	11.9	9.6
MONTREAL	62.3	54.7	-7.6
QUEBEC CITY	39	51.4	12.4
SHERBROOKE	40.7	92.9	52.2
ONTARIO	NA	15.3	NA
ONTARIO CORE	15.9	10.9	-5.0
KINGSTON	NA	76.2	NA
OTTAWA	63.2	26.3	-36.9
ST. CATHARINES	NA	25.6	NA
SUDBURY	42.7	17.2	-25.5
THUNDER BAY	NA	78.2	NA
TORONTO	6	2.8	-3.2
WINDSOR	68.5	74.3	5.8
MANITOBA	57.8	49.8	-8.0
BRANDON	59.8	62.9	3.1
WINNIPEG	57.7	48.7	-9.0
SASKATCHEWAN	67.2	44.6	-22.6
REGINA	54	48.6	-5.4
SASKATOON	79.4	41.1	-38.3
ALBERTA	NA	74.5	NA
ALBERTA CORE	63.8	74.0	10.2
CALGARY	56.9	78.8	21.9
EDMONTON	71.9	74.2	2.3
MEDICINE HAT	62.3	22.9	-39.4
RED DEER	NA	85.7	NA
BRITISH COLUMBIA	74.7	64.0	-10.7
KELOWNA	92.5	88.7	-3.8
CAMPBELL RIVER/COURTNAY	70.8	66.4	-4.4
VANCOUVER CMA	74.4	61.9	-12.5
VANCOUVER 1	NA	59.3	NA
VANCOUVER 2	NA	63.6	NA
VANCOUVER 3	NA	66.0	NA
VANCOUVER 4	NA	60.3	NA

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

2.4. Sign Compliance by Provincial Legislative Component (Table 18)

Table 18 shows retailer compliance by each individual sign component for signs mandated under the *Tobacco Act* or corresponding provincial legislation.

The vast majority of retailers in each province comply at least partially with the sign laws. 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 proscribed places, or where they are less disciplined in posting ancillary signs. The situation in cities like Toronto, Ottawa and St. Catharines, Ontario offers a good illustration of this. Across the province, age restriction and cash register signs will be found in the large majority of establishments. What are far less prevalent are the "No Smoking" signs that the law also requires. Because of this oversight, full compliance with the tobacco sign laws is low in Ontario.

Failure to comply with all aspects of the sign laws is also the reason that sign compliance is lower this year in several cities than it was in 2000. Cities like Toronto, Ottawa and Sudbury are lower because the "No Smoking" sign is posted in fewer stores and less often than other signs. In Halifax and Sydney, the required signs are in most establishments, but the Nova Scotia sign size requirement that must also be met (based on the length of the tobacco display wall) appear not to be adhered to as rigorously as before. Medicine Hat contributes to lower national compliance because signs in many stores there were not bilingual.

There are only three cities where even partial compliance with the sign laws is low, i.e., below sixty percent. These are places where it might be said that a considerably large percentage of retailers are in flagrant violation of the rules. These include Chicoutimi/Jonquiere (11.9%), Winnipeg (48.7%) and (Montreal (54.7%). The figures in Montreal and Winnipeg represent decreases from the last reading.

In Saskatchewan, the province's new 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. Although the majority of retailers in Regina and Saskatoon,—the two cities we measured in Saskatchewan--- had either of the two mandatory signs, fewer in each city had both. The great majority of retailers in these cities had no other sign but these. In all, fewer than half of Saskatchewan retailers (44.6%) met the new sign requirement in its entirety.

Table 18 - (Weighted) Retailer Compliance With Mandatory Tobacco Sign Provisions – 2002

How To Interpret This Table

The figures in each column other than that labeled *Full Compliance*, show the percentage of retailers properly posting only the one indicated type of sign referred to at the top of the column. The figures in the column labeled *Full Compliance* indicate those retailers properly posting every required sign in the region shown and, in the case of the national figure, across all regions in the country. Percentages on the same line can be different, because they mean different things, and do not indicate an error.

Region	Age restriction sign at all required Locations	Door decal indicating legal age of 19	Health warning sign	Sign indicating legal age and photo ID required	"No Smoking" sign	"Tobacco can kill you" sign	"Tobacco Restricted" sticker	Other non-authorized siigns **Not** Present (Sask only)	% Stores with signs in both languages	Full Compliance	Sign saying "You may smoke here"
National	57.5									44.0	
National (Core 25 cities)	55.4									43.4	
St. John's, NFLD	95.9									95.9	
Charlottetown, PEI		100.0		100.0						100.0	
New Brunswick			95.6	87.2		87.0				78.3	
New Brunswick (core)			94.5	80.8		82.4				69.7	
Bathurst			91.8	80.7		77.2				71.9	
Fredricton			98.6	97.3		94.5				90.4	
Moncton			97.7	100.0		96.2				95.4	
Saint John			93.3	69.2		76.9				53.8	
Nova Scotia		90.1		71.2			82.4			36.2	
Halifax		88.9		63.2			80.1			31.7	
Sydney		92.7		89.6			87.8			46.4	
Quebec	56.4								56.4	53.9	
Chic./Jonquiere	11.9								34.8	11.9	
Total Montreal	54.8								56.3	54.7	
Quebec City	65.2								54.5	51.4	
Sherbrooke	92.9								92.9	92.9	
Ontario	80.3			78.3	17.3					15.3	2.4
Ontario (core)	78.7			77.0	12.1					10.9	0.6
Kingston	88.7			88.8	94.5					76.2	2.5
Ottawa	85.5			87.5	29.3					26.3	0.2
St. Catharines	88.6			85.9	29.4					25.6	19.2
Sudbury	69.2			68.8	24.8					17.2	0.8
Thunder Bay	99.3			88.8	88.7					78.2	10.7
Toronto	76.3			73.8	3.4					2.8	0.7
Windsor	98.4			97.1	77.2					74.3	0.0
Manitoba	50.1								56.3	49.8	
Brandon	66.5								62.9	62.9	
Winnipeg	48.7								48.7	48.7	
Saskatchewan	73.8			58.7				86.3		44.6	
Regina	83.8			63.6				89.3		48.6	
Saskatoon	64.9			54.3				83.7		41.1	
Alberta	78.3								76.3	74.5	
Alberta (core)	77.8								75.9	74.0	
Calgary	81.9								81.6	78.8	
Edmonton	74.9								75.3	74.2	
Medicine Hat	66.3								22.9	22.9	
Red Deer	88.5								85.7	85.7	
British Columbia			77.0	77.8						64.0	
Kelowna			93.8	90.5						88.7	
Campbell River/Courtnay			76.9	82.8						66.4	
Vancouver CMA			75.7	76.5						61.9	
Vancouver 1			71.4	74.9						59.3	
Vancouver 2			76.2	79.8						63.6	
Vancouver 3			82.9	76.9						66.0	
Vancouver 4			78.2	75.7						60.3	

Vancouver 1: Vancouver, Richmond
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PART B
TOBACCO ADVERTISEMENTS AT POINT OF SALE

ACNielsen has monitored the extent and quality of distribution of tobacco advertising at point of sale since 1996. For this year's study, measurements were established as follows:

- for all stores and by trade class, an indication of the number and type of in-store tobacco promotional items in these outlets, including counter-top displays, shelf-talkers, danglers, posters and other promotional merchandise[6]; and

- for chain convenience, independent convenience stores and gas bars/service stations, the information on the same tobacco point-of-sale 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 second one taken following the date when a total ban on tobacco sponsorship advertising at point-of-sale was imposed by the federal government. The first measurement after the ban was taken 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 point-of-sale merchandising since sponsorship restrictions were imposed a few years ago. It should be clarified that the use of the words "advertising" or "ad" in this section refer more accurately to tobacco merchandising and promotional materials at point-of-sale.

This survey is the first to be taken since tighter restrictions were placed on product placement and display in Saskatchewan. Under the *Tobacco Control Act* of that province that came into effect in 2002, any retail establishment selling tobacco and frequented by persons below eighteen years of age must ensure that tobacco products are hidden from view. Later in this section we will report results based on compliance with this aspect of Saskatchewan law.

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 colors that are associated with tobacco products or the companies that manufacture them.

[6] The definition of "posters" is self-explanatory. Broad definitions of the other forms of point-of-sale advertising are these: "counter-top display": a tobacco display either supplied by the manufacturer or set up by the retailer that is small enough to sit on the counter. A display credit will have been given whether or not an advertising backboard was attached.; "dangler" is a merchandising piece or strip of paper affixed to the shelf and that overhangs the advertised tobacco brand; "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 store. Prefabricated tobacco elements to which facings are mounted on the regular power wall were treated as regular facings, and not given distribution credit.

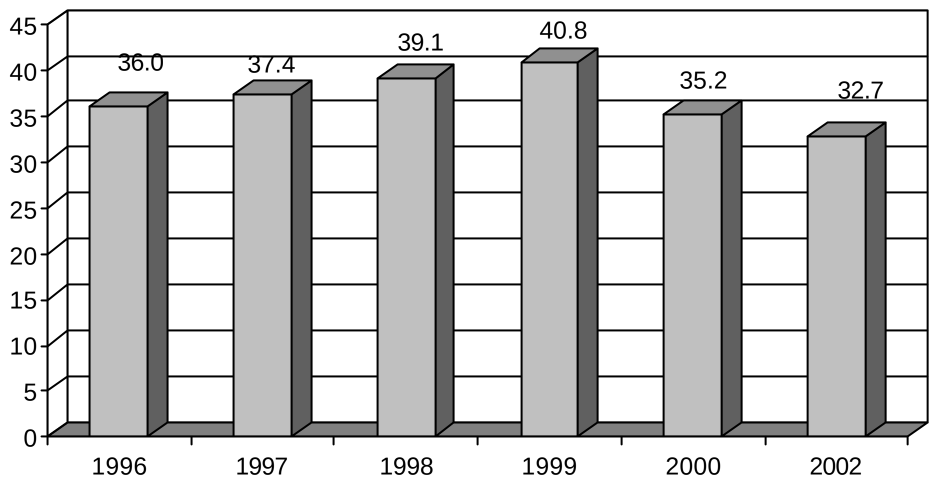
1. General Trends In Tobacco POS Advertising

1.1. Distribution Of Point-Of-Sale (POS) Advertising

At the national level, the nature and availability of tobacco-related POS material has not changed since the last measurements taken in 2000. Across five classes of trade and thirty cities, an estimated 32.7% of retailers carried some form of point-of-sale advertising. This weighted national figure is the lowest distribution of POS tobacco ads since measurements were first taken in 1996. However, statistically, the figure is not significantly lower than the 35.2% in 2000.

Nationally, no single piece of POS advertising material was found in more than twenty-eight percent of stores (compares with twenty-seven percent in 2000). Following the ban on tobacco sponsorship advertising, after the 1999 results, tobacco companies realigned their in-store merchandising vehicles.[7] The traditional predominance of posters was replaced by the shift to counter-top displays. The strategies adopted then appear to be in place still today. Among specific forms of POS ads, counter-top displays remain the predominant ad form available in the largest percentage of stores (28.0% distribution, a figure comparable to the 26.6% of the previous study).

Chart 16 - Weighted - National
% of All Stores With Tobacco Ads



The one further change that has taken place since the last measurement in 2000 is the virtual disappearance of "other" forms of POS merchandise, typically trademarked tobacco calendars and wall clocks, as a means of promotion. These items are almost completely phased out following the sponsorship ban, but interestingly, some three percent of stores nationally still have such items on display.

[7] Discussed in the report, *Final Report of Findings: 2000/01: Measurement of Retailer Compliance With Respect to the* Tobacco Act *& Provincial Toabcco Sales-to-Minors Legislation*, ACNielsen, March 2001, p.69.

Table 19 – Weighted – National (All Stores)
% of Stores With Point-of-Sale Advertising By Type of Ad

	1996	1997	1998	1999	2000	2002
All Ad Types	36.0	37.4	39.1	40.8	35.2	32.7
Danglers	1.2	1.6	0.4	2.8	0.5	0.7
Shelf-Talkers	12.5	1.7	1.2	1.4	1.8	3.1
Posters	16.6	14.0	12.5	14.9	4.2	1.2
Counter -Top Displays	13.6	17.0	19.8	17.4	26.6	28.0
Other Ad Types	14.8	16.1	18.6	19.2	10.3	2.5

In comparison with findings in 2000, the distribution of tobacco ads was measurably lower, or nil this year, in seventeen of the core twenty-five cities both studies had in common. Eight of the thirty cities we surveyed in all had no ads whatsoever, including seven core cities and Moncton, one of the new cities surveyed for the first time this year.

Retailers in the Atlantic region, Ontario, Saskatchewan, Manitoba and BC were the least likely to have ads; those in Quebec and Alberta, the most likely. In Alberta, despite the relatively great percentage of retail outlets with tobacco POS, the current ad distribution levels are nonetheless lower than they were in 2000. This is not the case in Quebec, where ad distribution levels are not only high, but where, across the four cities surveyed in that province, distribution is as high or higher now than it was two years ago.

Retailers in both cities measured in Saskatchewan are among those with no tobacco POS materials in their stores at all, and reporting among the most significant decreases since the last survey. The recent law change in this province obviously is responsible for the removal of tobacco-related advertising at point-of-sale.

In the majority of cities where distribution has decreased, this can be attributed to declines in distribution of the ad types that were most popular in 2000: chiefly counter-top displays and shelf-talkers.

Tobacco ad distribution was lowest (less than 10.0%) in those areas shown in the table (next page):

Table 20 – Weighted- All Stores Changes in Point-of-Sale Ad Distribution Across Regions – 2002 vs 2000 Results			
% of Stores With Ads			
Cities Where Tobacco Ad Distribution Weakest This Year	2000	2002	Diff 2002 vs 2000
• Charlottetown	0.0	0.0	0.0
• Bathurst	1.5	0.0	(1.5)
• Moncton	NA	0.0	-
• Halifax	10.6	0.0	(10.6)
• Sydney	25.0	0.0	(25.0)
• Regina	34.4	0.0	(34.4)
• Saskatoon	50.7	0.0	(50.7)
• Kelowna	0.0	0.0	0.0
• Saint John, NB	39.6	1.9	(37.7)
• Fredericton	34.1	2.7	(31.4)
• Brandon	46.7	8.0	(38.7)

Eight communities of the core twenty-five reported higher ad distribution this year than in 2000. In most of these, the percentage of retail outlets with tobacco POS remains below the national average, but this is not the case everywhere. As indicated above, absolute distribution of tobacco POS advertising remains above average across Alberta and Quebec, but it is in Quebec that levels have actually increased over those measured in 2000. Outside these provinces, the only city where levels are high and have increased since the last measurement is Windsor. Interestingly, Windsor was on the net gainers list last time as well. Proximity to the US border may be a factor keeping POS ad levels in Windsor higher than in other parts of Ontario.

The cities where tobacco ad distribution levels are highest are shown in the table below. The list includes three cities with the largest absolute increase in ad distribution since the last survey. These are: Sherbrooke, Chicoutimi/Jonquiere and Sudbury. Not on this list is Campbell River/Courtnay, Vancouver and St. John's, NFLD, where, relatively high distribution increases aside, the absolute levels remain relatively low (about twenty percent for each city).[8]

[8] Ibid, Part B.

Table 22 – Weighted- All Stores Changes in Point-of-Sale Ad Distribution Across Regions – 2002 vs 2000 Results			
% of Stores With Ads			
Cities Where Tobacco Ad Distribution Is Highest	2000	2002	Diff 2000/01 vs '99
• Quebec City	72.3	66.7	(5.6)
• Sherbrooke	23.9	62.9	39.0
• Windsor	54.6	58.0	3.4
• Montreal	51.4	53.8	2.4
• Red Deer	NA	50.8	NA
• Chicoutimi/Jonquiere	20.9	48.4	27.5
• Calgary	50.6	42.6	(8.0)
• Edmonton	57.6	40.7	(16.9)
• Winnipeg	41.0	33.3	(7.7)
• Sudbury	6.8	31.2	24.4
• Ottawa	46.6	30.3	(16.3)
• Medicine Hat	35.6	29.9	(5.7)

In all of these cities, ad distribution remained higher or increased chiefly as the result of the established presence and/or added proliferation of counter-top displays.

Quebec City and Sherbrooke were the only two areas of the country with ad distribution above sixty percent. Three other cities: Windsor, Montreal and Red Deer had distribution above fifty percent.

1.2. POS Ad Share & Number Of Ads Per Store By Type

POS Ad Share By Type

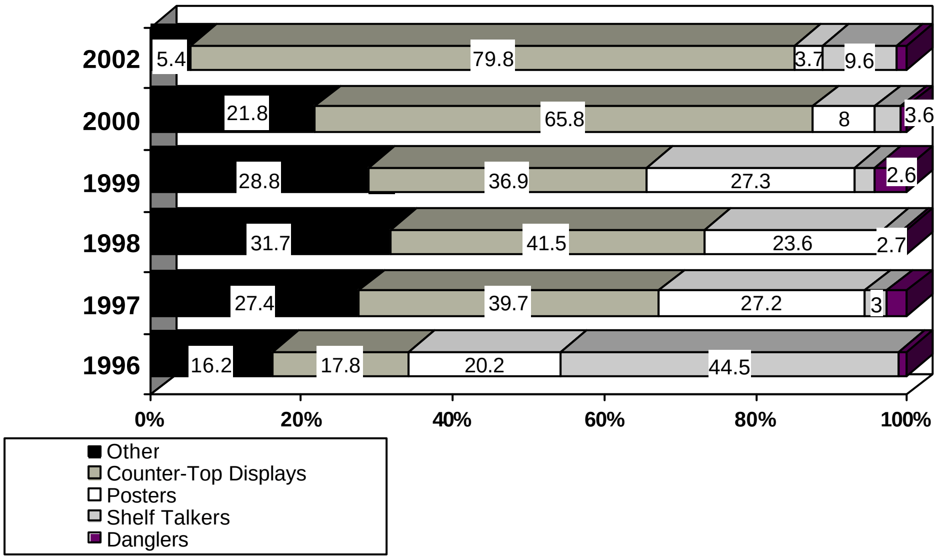
Nationally, counter-top displays now account for virtually all of the tobacco POS materials at retail. These displays make up eighty percent (79.8%) of the ad forms out there. The figure is higher than it was in 2000 and, indeed, represents the highest level of concentration ever for any single form of tobacco advertising.

The only reason counter-top displays are more important now than before is because other forms of tobacco advertising are fewer in stores. The actual percentage of stores with counter-top displays has not changed since last time, nor has the average number of displays in stores increased. Just over a quarter of all stores carry these displays now as in 2000, and the average store has 1.6 counter-top displays in place today, compared with 1.9 in the last survey.

There hardly remain stores displaying posters, danglers or "other" forms of tobacco advertising (eg: calendars, clocks). None of these ad forms is found in more than 2.5% of stores nationally. The presence of shelf-talkers is a little higher today than in 2000, but these too are available in no more than 3.1% of stores. Where any of these ad forms are still in place, retailers carry no more today, on average, than they did before. The situation reflects the restrictions on tobacco sponsorship advertising that have been in effect for the last several years.

All things considered, today there are far less of the specifically-measured POS tobacco ads than at anytime in the recent past.

Chart 17 - National (Weighted) Share of Ads By Type (1996 - 2002)



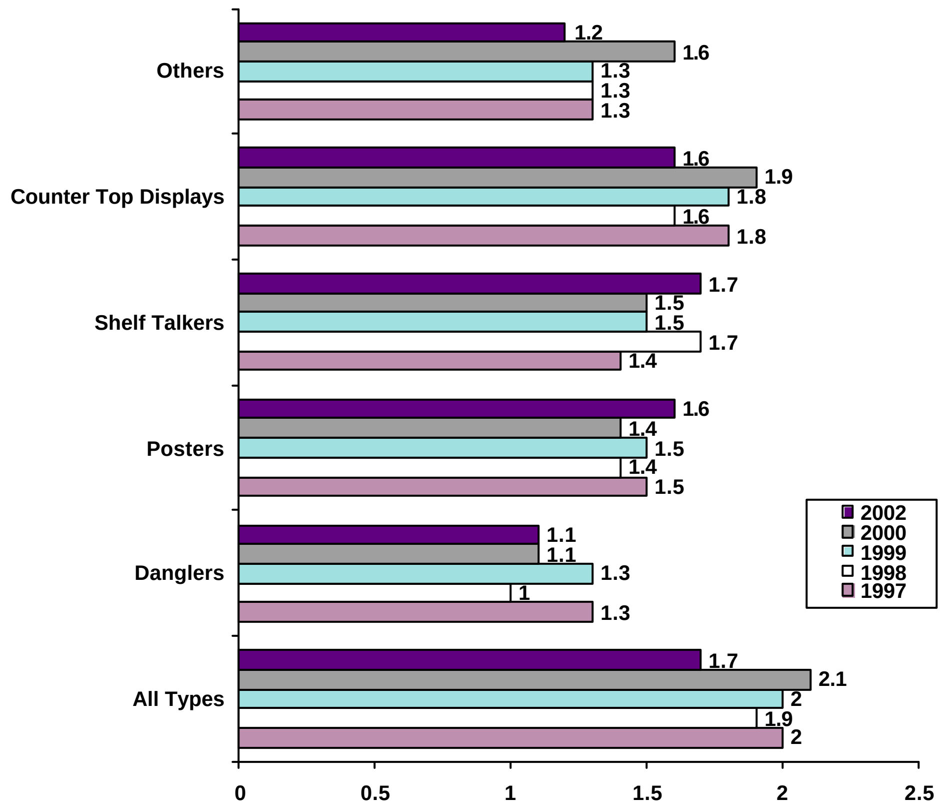
Regionally, tobacco advertising patterns often mimic the national findings. Counter-top displays were by far the most prominent forms of advertising left in most communities--- but not all:

- in Windsor, where more than half of stores still carry tobacco ads, posters still make up the largest share of ads. Posters are available in forty percent of area stores and make up 65.7% of all ads. Counter-top displays represent less than a third of tobacco POS ads in Windsor;
- in Brandon, where a small number of retailers (8.0%) still carry ads, the vast majority (76.5%) are in the form of shelf-talkers;
- in Medicine Hat, Sudbury and Chicoutimi/Jonquiere, counter-top displays make up no more than half of available ads. Posters remain prominent in Medicine Hat, “other” ad forms still dominate in Sudbury, and in Chicoutimi/Jonquiere, posters, shelf-talkers and even danglers are about equally available.

Average Number Of Ads By Type Per Store

The average number of ads in stores with ads was 1.7. The number of ads per store carrying is lower than at any time since 1997, at the same time that the number of stores with any ads has dropped.

Chart 18 - Weighted
Average No. Of Tobacco POS Ads Per Store Carrying - (1996-1999)



Note: These averages cannot be added to arrive at a cumulative total because not all stores carry all ads. The combined average is an estimate calculated by dividing the total number of ads in distribution by the number of retail outlets that have at least one in-store tobacco ad. Store averages for individual types of ads are arrived at by dividing the total number of ads of that type by the number of stores handling that ad

Table 23 – Tobacco Point-of-Sale Ad Distribution & Share Summary – All Stores (Weighted)

	Total	Total	Dangler			Poster			C/T Display			Shelf Talker			Other		
	Proj Dist%	Proj Avg	Proj Dist%	Share	Proj Avg	Proj Dist%	Share	Proj Avg	Proj Dist%	Share	Proj Avg	Proj Dist%	Share	Proj Avg	Proj Dist%	Share	Proj Avg
NATIONAL	32.7	1.7	0.7	1.5	1.1	1.2	3.7	1.6	28.0	79.8	1.6	3.1	9.6	1.7	2.5	5.4	1.2
NATIONAL CORE 25	33.4	1.7	0.7	1.4	1.1	1.3	3.8	1.7	28.5	79.4	1.6	3.3	9.9	1.7	2.6	5.5	1.2
ST. JOHN'S	21.3	1.2	NA	0.0	NA	2.4	11.7	1.4	19.4	83.3	1.1	1.0	3.3	1.0	NA	0.0	NA
CHARLOTTETOWN	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
NEW BRUNSWICK	1.1	1.0	NA	0.0	NA	0.6	50.0	1.0	NA	0.0	NA	NA	0.0	NA	0.6	50.0	1.0
NEW BRUNSWICK CORE	1.7	1.0	NA	0.0	NA	0.8	50.0	1.0	NA	0.0	NA	NA	0.0	NA	0.8	50.0	1.0
BATHURST	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
FREDERICTON	2.7	1.0	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	2.7	100.0	1.0
MONCTON	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
SAINT JOHN	1.9	1.0	NA	0.0	NA	1.9	100.0	1.0	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
NOVA SCOTIA	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
HALIFAX	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
SYDNEY	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
QUEBEC	56.1	1.8	1.5	1.6	1.1	0.6	0.8	1.2	49.2	82.5	1.7	8.2	14.9	1.8	0.2	0.2	1.1
CHIC/JONQUIERE	48.4	2.4	14.8	14.5	1.1	14.0	15.6	1.3	39.9	50.3	1.5	16.2	17.9	1.3	0.7	1.2	2.0
MONTREAL	53.8	1.6	1.2	1.3	1.0	NA	0.0	NA	45.3	78.1	1.5	9.8	20.6	1.8	NA	0.0	NA
QUEBEC CITY	66.7	2.1	0.5	0.3	1.0	0.8	0.5	1.0	65.8	97.7	2.1	1.3	1.3	1.5	NA	0.0	NA
SHERBROOKE	62.9	2.1	NA	0.0	NA	NA	0.0	NA	62.9	96.3	2.1	NA	0.0	NA	5.0	3.7	1.0
ONTARIO	26.5	1.6	0.3	0.7	1.1	2.3	9.8	1.8	20.0	68.8	1.5	0.9	3.1	1.5	6.5	17.6	1.2
ONTARIO CORE	27.1	1.6	0.2	0.4	1.0	2.7	11.1	1.8	20.0	65.9	1.4	0.9	3.1	1.5	7.2	19.5	1.2
KINGSTON	24.2	1.2	NA	0.0	NA	NA	0.0	NA	24.2	100.0	1.2	NA	0.0	NA	NA	0.0	NA
OTTAWA	30.3	1.2	NA	0.0	NA	0.4	0.9	1.0	30.0	99.1	1.2	NA	0.0	NA	NA	0.0	NA
ST. CATHARINES	22.8	1.6	1.3	4.8	1.3	NA	0.0	NA	20.4	82.6	1.5	1.3	6.6	2.0	2.2	6.0	1.0
SUDBURY	31.2	1.4	0.8	1.8	1.0	NA	0.0	NA	13.7	40.4	1.3	NA	0.0	NA	17.4	57.9	1.4
THUNDER BAY	17.9	3.4	NA	0.0	NA	NA	0.0	NA	16.9	97.8	3.5	NA	0.0	NA	1.0	1.1	1.0
TORONTO	23.9	1.6	0.2	0.5	1.0	NA	0.0	NA	18.0	70.4	1.5	1.0	3.5	1.4	8.6	25.7	1.2
WINDSOR	58.0	1.9	0.3	0.3	1.0	40.2	65.7	1.8	26.1	30.4	1.3	2.0	3.6	2.0	NA	0.0	NA
MANITOBA	31.3	1.4	NA	0.0	NA	0.2	0.6	2.0	30.7	94.2	1.4	1.0	5.2	2.2	NA	0.0	NA
BRANDON	8.0	3.8	NA	0.0	NA	2.0	11.8	2.0	2.0	5.9	1.0	8.0	76.5	3.0	NA	0.0	NA
WINNIPEG	33.3	1.4	NA	0.0	NA	NA	0.0	NA	33.1	99.0	1.4	0.4	1.0	1.0	NA	0.0	NA
SASKATCHEWAN	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
REGINA	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
SASKATOON	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
ALBERTA	41.5	1.8	2.1	3.7	1.3	1.5	2.6	1.2	38.0	84.0	1.6	5.1	9.5	1.4	0.1	0.2	1.0
ALBERTA CORE	41.1	1.8	1.9	3.4	1.3	1.4	2.4	1.3	37.7	84.2	1.6	5.3	10.0	1.4	NA	0.0	NA
CALGARY	42.6	1.8	NA	0.0	NA	NA	0.0	NA	42.6	100.0	1.8	NA	0.0	NA	NA	0.0	NA
EDMONTON	40.7	1.8	3.8	6.7	1.3	1.1	2.0	1.3	34.8	71.0	1.5	10.8	20.2	1.4	NA	0.0	NA
MEDICINE HAT	29.9	1.7	2.0	5.0	1.0	18.3	45.0	1.3	17.7	50.0	1.4	1.6	2.5	1.0	NA	0.0	NA
RED DEER	50.8	1.8	5.7	9.0	1.5	4.9	6.0	1.0	46.1	82.1	1.6	NA	0.0	NA	2.9	3.0	1.0
BRITISH COLUMBIA	17.1	1.3	NA	0.0	NA	NA	0.0	NA	16.1	94.1	1.3	0.3	1.6	1.2	1.0	4.4	1.0
CAMPBELL RIVER/COURTNAY	21.7	1.1	NA	0.0	NA	NA	0.0	NA	21.7	100.0	1.1	NA	0.0	NA	NA	0.0	NA
KELOWNA	NA	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA	NA	0.0	NA
VANCOUVER CMA	18.3	1.3	NA	0.0	NA	NA	0.0	NA	17.1	93.6	1.3	0.3	1.7	1.2	1.1	4.6	1.0
VANCOUVER 1	16.6	1.5	NA	0.0	NA	NA	0.0	NA	16.3	96.3	1.4	0.7	3.7	1.2	NA	0.0	NA
VANCOUVER 2	25.5	1.3	NA	0.0	NA	NA	0.0	NA	24.7	97.6	1.3	NA	0.0	NA	0.8	2.4	1.0
VANCOUVER 3	15.4	1.1	NA	0.0	NA	NA	0.0	NA	11.9	76.6	1.1	NA	0.0	NA	3.8	23.4	1.0
VANCOUVER 4	15.6	1.3	NA	0.0	NA	NA	0.0	NA	14.8	96.6	1.3	NA	0.0	NA	0.8	3.4	1.0

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

1.3. Tobacco Advertising by Class of Trade (Table 24)

Smaller-surface stores were more likely than larger-area stores to carry tobacco POS merchandising materials. The highest distribution of such goods was in convenience chains (57.8%), gas stations/kiosks (34.1%) and independent convenience stores (33.0%).

Across all channels those stores with tobacco POS materials, on average, had more than one piece per store.

Nationally, the percentage of each store type carrying POS ads was not substantially different from levels reported in 2000, except in pharmacies and grocery supermarkets[9]. Substantially fewer pharmacies (4.7%) carry tobacco POS merchandising now than in 2000, and those that still do average fewer ads per store than in the past. Indeed, pharmacies were the least likely of any retail trade class to carry POS ads.

Across grocery stores, the distribution of POS ads was marginally higher than in 2000, and the average number of ads per store carrying was also up (from 1.9 pieces in 2000 to 2.5 pieces now). However, tobacco POS material is still likely to be found in no more than twelve percent of grocery stores.

Across each separate class of trade, counter-top displays were available in more stores than any other ad type. Once again, smaller-surface stores were the most likely to carry counter-top displays, and most of these stores with displays carried about two displays per location.

The incidence of “other” ad forms (i.e, wall clocks, calendars and the like) is much diminished, to the point very these items have all but disappeared from view in every class of trade.

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

[9] Ibid, pg. 76

Table24 - Tobacco Point-of-Sale Advertising By Class Of Trade (Weighted) All Ad Types – 2002						
Region	All Store Types	Convenience Chains	Pharmacies	Gas	Grocery Super-markets	Ind't. Conv.
% Stores Carrying Any Ad	32.7	57.8	4.7	34.1	12.0	33.0
Average # All Ads In Store	1.7	1.8	1.6	1.5	2.5	1.6
% Stores With Danglers	0.7	1.9	0.6	0.6	2.3	0.3
Average # Danglers In Store	1.1	1.1	1.0	1.5	1.0	1.1
% Stores With Posters	1.2	1.5	0.0	1.2	0.3	1.5
Average # Posters In Store	1.6	2.0	0.0	1.6	2.0	1.6
% Stores With Shelf Talkers	3.1	5.3	0.6	3.2	5.6	2.6
Ave. # Shelf Talkers In Store	1.7	1.6	1.0	1.7	1.8	1.7
% Stores With Counter-Top Displays	28.0	52.0	4.7	28.5	7.2	28.3
Ave. # Counter-Top Displays In Store	1.6	1.7	1.3	1.4	2.3	1.6
% Stores With “Other” Ads	2.5	3.7	0.0	3.3	0.0	2.6
Ave. # “Other” Ads In Store	1.2	1.1	0.0	1.0	0.0	1.3

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

1.4. Tobacco Advertising By Proximity To Schools &/Or Malls (Table 25)

Nationally, no statistically meaningful difference exists regarding the availability of tobacco advertising based on the proximity of stores to schools or malls. Across all cities, ad distribution was 31.5% in stores closest to schools/malls and 33.8% in stores further away.

Within the various trade classes, distribution differences based on location to schools/malls were largely insignificant, except in the case of convenience chains. Here, stores closer to schools or malls were less likely than those further away to carry ads. This is the first year that a shift in this direction was noted.

Table 25 – Tobacco Ad % Distribution
Based on Store proximity to Schools/Malls (Weighted) – 1997-2002

	1997	1998	1999	2000	2002
All Store Types					
Near	39.8	35.8	41.6	35.3	31.5
Away	35.7	42.2	40.4	35.1	33.8
Convenience Chains					
Near	63.0	59.1	57.3	61.5	54.6
Away	55.1	50.3	50.6	60.0	60.4
Pharmacies					
Near	31.8	25.9	22.5	24.3	4.6
Away	32.0	22.8	19.5	23.1	4.9
Gas Stations					
Near	32.8	30.0	27.4	33.6	33.8
Away	25.6	36.0	30.2	30.0	34.2
Independent Convenience					
Near	43.6	38.8	47.3	36.7	34.3
Away	36.1	44.6	43.0	35.3	32.1
Supermarkets					
Near	10.6	5.1	6.9	6.2	10.8
Away	17.5	16.6	8.1	9.3	14.3

1.5.Tobacco Advertising Under Saskatchewan Law

The recently adapted *Tobacco Control Act* of Saskatchewan is very clear in its prohibitions against certain sales promotion practices at point-of-sale[10]. Among its provisions, the law:

- specifically prohibits the advertising or promotion of tobacco or tobacco-related products in any place or premises in which these products are sold if young persons (i.e., those under the age of 18 years) are permitted access to the premises;
- requires that tobacco retailers post no signs respecting legal age to purchase tobacco or tobacco-related products other than the signs supplied or specifically approved for posting by the province;
- prohibits stores where young persons are permitted access to the premises from displaying tobacco or tobacco-related products in any way that these are visible to the public.

We have seen elsewhere in this report that the law in Saskatchewan has effectively removed all tobacco-related point-of-sale advertising from Saskatchewan retail outlets where young persons are permitted to shop. We also discussed, in sections above, retailer compliance with the province's sign provisions, including the presence in a small minority of stores of "Operation ID" signs not allowed under the law. In this section we report on compliance with respect to Saskatchewan's prohibition against the display of tobacco products, in particular the display of product facings, at the tobacco counter and anywhere in view of young customers.

The great majority of retailers in both Regina and Saskatoon (93% in all) complied with Saskatchewan's new law and kept tobacco displays hidden from view. The compliance figures in Regina and Saskatoon separately are virtually the same (92% and 93%, respectively). A total of 319 stores were visited across both cities and the absolute number of stores actually found to be in violation of the law is relatively small.

Compliance in both cities was also very consistent across classes of retail trade. The lowest incidence of failure to keep tobacco displays from view was recorded in independent convenience stores in Regina (86% in compliance). Highest compliance was among grocery retailers in both cities. These were found 100% in compliance.

The table below summarizes our findings for this part of the survey:

Table 26 – Weighted
% of Saskatchewan Retailers With Tobacco Product Hidden From View

	All Stores	Chain Convenience	Gas Stations	Grocery	Ind't Convenience	Pharmacies
Saskatchewan (all)	93	95	94	100	89	91
Regina	92	100	93	100	86	92
Saskatoon	93	92	95	100	93	90

[10] *The Tobacco Control Act* of Saskatchewan, Part II, Section 6 (1-3) and Section 7 (1-2).

2. Tobacco POS Advertising by Brand (Selected Classes of Trade)

Data was collected on tobacco point-of-sale advertising in convenience chains, independent convenience stores and in gas convenience stores/gas station kiosks. In this section are summarized findings in each store type.

2.1. Convenience Chains (Excluding Independents & Gas Convenience Stores)

Distribution - Nationally, the tobacco brand with the highest distribution of ads remained "du Maurier", with ads available in 39.8% of convenience chain stores. The brand not only retained the top spot it held in the 2000 survey, but also increased the percentage of stores where its merchandising materials could be found, up from 27.0% in 2000. Ad distribution for each of the other leading POS promoted tobacco brands was lower than in the last survey[11].

The ranking of brand families with the highest distribution of POS advertising is as follows in the latest survey:

1. du Maurier — ads in 39.8% of stores
2. Players — ads in 18.1% of stores
3. "Others" (combined, not specified) — Ads in 14.4% of stores
4. Export A (excluding Smooth) — ads in 12.5% of stores
5. Benson & Hedges — ads in 6.5% of stores

These were the same products that made the list in our report of 2000 results. "Export A excluding Smooth)" has dropped from third to fourth place, below "Others" in the latest ranking.

Advertising support for tobacco brands and trademarks varied across the country:

- tobacco brand promotions at point-of-sale were virtually non-existent across Atlantic Canada;
- no convenience chains in Saskatchewan carried tobacco POS ads;
- in communities west of the Maritimes where POS material was present, "du Maurier" had POS promotions in more stores than any other brand. "Players" was generally in second place;
- stores in Quebec and Alberta had POS materials for the highest number of brands. In Quebec, POS promotions appeared at point-of-sale for eight of twelve brands; in Alberta, for seven of twelve. In the case of both provinces, the number of promoted brands is lower in this study than in 2000;
- no ads were available in convenience chains anywhere for "Remaining Export A", "Rothman's" and "Sportsman", while ads for "Matinee", "Canadian Classics" and "Belvedere" hardly registered;

[11] Ibid, p. 79

- for “du Maurier”, the availability of POS ads in more stores nationally was the result of substantially more stores across Quebec, Ontario and B.C. having POS supports in place now than in 2000.

Brand Share Of Ads – As you would expect, the share of ads controlled by individual tobacco brands at the time of our visit correlates closely with their relative level of ad distribution. Since our last measurement, “du Maurier” had become the leading source of tobacco promotions at retail point-of-sale.

1.	du Maurier	43.6%
2.	Players	18.8%
3.	“Other” brands (not specified)	17.6%
4.	Export A (excluding Smooth)	12.6%
5.	Benson & Hedges	6.4%

Regionally, brand ad shares fluctuated with ad distribution.

Average Number Of Ads Per Store - The absolute number of ads per store handling is lower now than in the previous survey. Nationally, across all tobacco brands, the average convenience chain store with ads carried 1.8 ad pieces, compared with 2.2 pieces in 2000. All brands using promotions averaged about one ad piece per store handling, indicating that, in the majority of convenience chains, each brand with an ad obtained a single ad of support. Since the average total number of ads in-store is about two, we can reasonably conclude that at least two tobacco brands were being advertised in the average convenience chain store at the time of our visits. This estimate is the same as in the last five surveys.

Table 27 - % Distribution and No. Of Ads Per Store By Brand By Type
Weighted National Results -Convenience Chains – 2002

Ad Availability Chain Convenience	Total		C/T Display		Dangler		Poster		Shelf Talker		Other	
Brands	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg
Total	57.8	1.8	52.0	1.7	1.9	1.1	1.5	2.0	5.3	1.6	3.7	1.1
Belvedere	0.1	1.0	0.1	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Benson & Hedges	6.5	1.0	5.1	1.0	0.0	0.0	0.0	0.0	1.5	1.0	0.0	0.0
Canadien Classics	0.1	1.0	0.1	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Du Maurier	39.8	1.1	35.4	1.0	0.7	1.0	0.3	1.0	4.4	1.0	3.5	1.0
Export A	12.5	1.0	12.1	1.0	0.5	1.0	0.0	0.0	0.2	1.0	0.0	0.0
Export A Smooth	0.6	1.0	0.6	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Remaining Export A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Matinee	0.1	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.0	1.0	1.0
Players	18.1	1.1	15.7	1.0	0.8	1.0	0.2	1.0	1.7	1.0	0.7	1.0
Rothmans	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sportsman	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	14.4	1.2	13.2	1.1	0.1	1.0	1.2	2.1	0.3	1.2	0.0	0.0

Brand Advertising By Type Of Ad – Counter-top displays are by far the most popular form of POS ads in convenience chains. These were found in more stores than any other ad type (52.0%), and represented more than eighty percent of all ads in convenience chain stores. They accounted for the lion's share of ads for all of the leading advertised brands.

After counter-top displays, distribution and share for other forms of POS advertising drops off dramatically. Shelf-talkers take second place with a comparatively low 5.3% of stores handling nationally, and 8.0% share of tobacco ads in convenience chains.

Table 28 - Ad Type Importance Within Brand (% Share Of Brand Ads)
Weighted National Results -Convenience Chains – 2002

Share of Ads - Chain Convenience Stores	All Ads	C/T Displays	Dangler	Poster	Shelf Talker	Other
Total	100.0	83.1	2.0	2.9	8.0	4.0
Belvedere	100.0	100.0	0.0	0.0	0.0	0.0
Benson & Hedges	100.0	76.9	0.0	0.0	0.0	0.0
Canadien Classics	100.0	100.0	0.0	0.0	0.0	0.0
Du Maurier	100.0	80.2	1.6	0.6	9.9	7.8
Export A	100.0	94.0	3.9	0.0	1.7	0.0
Export A Smooth	100.0	100.0	0.0	0.0	0.0	0.0
Remaining Export A	NA	NA	NA	NA	NA	NA
Matinee	100.0	0.0	0.0	0.0	100.0	0.0
Players	100.0	81.9	4.1	1.2	8.8	3.8
Rothmans	NA	NA	NA	NA	NA	NA
Sportsman	NA	NA	NA	NA	NA	NA
Other	100.0	82.8	0.6	14.4	2.2	0.0

The figures on the next page summarize the leading advertised brands within each ad type. For each brand listed, we show the brand's share of all such ads nationally, the percent (distribution) of all chain convenience stores carrying at least one ad of that type and the average number of such ads per store carrying:

Table 29 - Weighted – Point-of-Sale Advertising: Tobacco Brands - Convenience Chains

All Cities – 2002

Ad Type: Counter-Top Displays	Brand Share Of CT Displays	% Distribution	Ave. # Displays/Store
1. du Maurier	42.3	35.4	1.0
2. Players	18.7	15.7	1.0
3. "Others" (not specified)	17.6	13.2	1.1
4. Export A (excl. Smooth)	14.6	12.1	1.0

Ad Type: Posters	Brand Share Of Posters	% Distribution	Ave. # Posters/Store
1. "Others" (not specified)	83.6	1.2	2.1
2. du Maurier	9.1	0.3	1.0
3. Players	7.3	0.2	1.0

Ad Type: Shelf-Talkers	Brand Share Of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
1. du Maurier	52.7	4.4	1.0
2. Players	20.3	1.7	1.0
3. Benson & Hedges	18.2	1.5	1.0

Ad Type: Danglers	Brand Share Of Danglers	% Distribution	Ave. # Danglers/Store
1. Players	36.8	0.8	1.0
2. du Maurier	34.2	0.7	1.0
3. Export A (excl. Smooth)	23.7	0.5	1.0

Ad Type: Other Forms	Brand Share Of Other Ads	% Distribution	Ave. # Ads/Store
1. du Maurier	82.7	3.5	1.0
2. Players	17.3	0.7	1.0

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

2.2. Independent Convenience Stores

Distribution – While a third of independent convenience stores had tobacco POS ads, no single brand was advertised in more than a fifth of these outlets. Promotional support items for "du Maurier" were available in the largest percentage of these stores (17.6%). The remaining brands we measured had ads in a much fewer number of these outlets. The distribution of promotional support items for the top advertised brands was:

1. du Maurier	• ads in 17.6% of stores
2. "Others" (not specified)	• ads in 10.5% of stores
3. Players	• ads in 6.1% of stores
4. Benson & Hedges	• ads in 6.1% of stores
5. Export A	• ads in 4.8% of stores

No ads at all were found in independent convenience stores for "Export A Smooth", "Remaining Export A", "Matinee" and "Sportsman".

The list of the top-promoted brands in these stores is similar to that in convenience chain stores. Of all the brands, "du Maurier" is the one that has more than doubled its ad distribution from levels in 2000. All other brands report ad distribution lower now than before[12].

Following are highlights across regions regarding the distribution of tobacco brand ads in independent convenience stores:

- exceptionally few independent convenience stores across Atlantic Canada carried tobacco POS advertising. We found ads in a small minority of stores in St. John's, NFLD and in a lower percentage of stores still across the Maritimes;
- no independent convenience stores in Saskatchewan carried tobacco ads at point-of-sale;
- the highest distribution for any single named brand, in these outlets, in any given region was in Manitoba (Winnipeg), Alberta and Quebec. In each case, "du Maurier" was the brand with the highest regional ad distribution. Levels were 31.7%, 26.5% and 26.0% in each region, respectively;
- for "du Maurier", the availability of POS ads increased substantially since 2000 in the provinces of Quebec , Ontario, Manitoba, Alberta and B.C.;
- Quebec was the province with the largest number of brands being advertised. Ads for seven of the twelve brands monitored were found in independent convenience outlets across Quebec.

[12] Ibid, p. 84

Brand Share Of Ads – the brands with the greatest share of ads were the same as those whose ads had the highest distribution. Nationally, brand share of advertising in independent convenience stores looked like this:

1.	du Maurier	37.6%
2.	"Others" (not specified)	26.7%
3.	Players	13.3%
4.	Benson & Hedges	12.4%
5.	Export A	9.7%

Coincident with its higher ad distribution this year than in 2000, "du Maurier"'s share of advertising is also higher now than then.

Geographically, share levels varied for brands coincident with their ad distribution at the regional level.

Average Number Of Ads Per Store – Independent convenience stores averaged 1.6 ads per store handling ads. This is lower than the 2.2 ads handled in 2000. For brands with highest ad distribution, most independent convenience store retailers carried no more than one ad piece per store. The data suggests that there are about as many of these stores advertising two tobacco brands as there are advertising just one.

Table 30 - % Distribution and No. Of Ads Per Store By Brand By Type
Weighted National Results – Independent Convenience Stores – 2002

	Total		C/T Display		Dangler		Poster		Shelf Talker		Other	
Ad Availabilitiy Independent Convenience	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg
Total	33.0	1.6	28.3	1.6	0.3	1.1	1.5	1.6	2.6	1.7	2.6	1.3
Belvedere	0.1	1.4	0.0	1.0	0.0	0.0	0.1	1.0	0.1	1.0	0.0	0.0
Benson & Hedges	6.1	1.0	5.2	1.0	0.0	0.0	0.0	0.0	1.0	1.0	0.0	0.0
Canadien Classics	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Du Maurier	17.6	1.1	14.3	1.1	0.0	1.0	0.2	1.1	1.3	1.0	2.6	1.0
Export A	4.8	1.0	4.7	1.0	0.1	1.0	0.0	0.0	0.0	0.0	0.0	0.0
Export A Smooth	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Remaining Export A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Matinee	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Players	6.1	1.1	4.3	1.0	0.1	1.0	0.1	1.0	1.4	1.0	0.7	1.0
Rothmans	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0
Sportsman	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	10.5	1.3	9.3	1.2	0.1	1.0	1.1	1.7	0.4	1.1	0.1	1.0

Brand Advertising By Type Of Ad – Counter-top displays accounted for four-fifths of all ad types in independent convenience stores. They were the singularly major form of advertising for name brands with the highest ad distribution–- "du Maurier", "Export A" and "Players". Of this trio, "Players" counter top displays accounted for less of its available POS materials than the others (64.6%). The brand was the most likely also to have shelf-talkers in stores. These represented 20.9% of "Players" ads.

We remind the reader that distribution of these individual ad forms was no more than fourteen percent for any brand, and that shares are relative to the limited number of actual ads found.

Table 31 - Ad Type Importance Within Brand (% Share Of Brand Ads)
Weighted National Results –Independent Convenience Stores – 2002

Share of Ads - Independent Convenience	All Ads	C/T Displays	Dangler	Poster	Shelf Talker	Other
Total	100.0	81.1	0.6	4.2	7.8	6.2
Belvedere	100.0	18.2	0.0	36.4	36.4	0.0
Benson & Hedges	100.0	84.2	0.0	0.0	15.8	0.0
Canadien Classics	NA	NA	NA	NA	NA	NA
Du Maurier	100.0	78.9	0.1	1.0	6.6	13.4
Export A	100.0	98.5	1.7	0.0	0.0	0.0
Export A Smooth	NA	NA	NA	NA	NA	NA
Remaining Export A	NA	NA	NA	NA	NA	NA
Matinee	NA	NA	NA	NA	NA	NA
Players	100.0	64.6	2.2	1.4	20.9	11.0
Rothmans	NA	0.0	0.0	0.0	100.0	0.0
Sportsman	NA	0.0	0.0	0.0	0.0	0.0
Other	100.0	81.3	0.7	14.2	3.3	0.4

The figures on the next page summarize the leading advertised brands within each ad type. For each brand listed, we show the brand's share of all such ads nationally, the percent (distribution) of all chain convenience stores carrying at least one ad of that type and the average number of such ads per store carrying:

Table 32 – Weighted – Point-of-Sale Advertising: Tobacco Brands
Independent Convenience Stores - All Cities – 2002

Ad Type: Counter-Top Displays	Brand Share Of CT Displays	% Distribution	Ave. # Displays/Store
1. du Maurier	37.1	14.3	1.1
2. “Others” (not specified)	27.1	9.3	1.2
3. Benson & Hedges	13.1	5.2	1.0
4. Export A (excl. Smooth)	11.9	4.7	1.0
5. Players	10.7	4.3	1.0

Ad Type: Posters	Brand Share Of Posters	% Distribution	Ave. # Posters/Store
1. “Others” (not specified)	85.4	1.1	1.7
2. du Maurier	8.1	0.2	1.1
3. Players	4.3	0.1	1.0
4. Belvedere	2.2	0.1	1.0

Ad Type: Shelf-Talkers	Brand Share Of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
1. Players	33.7	1.4	1.0
2. du Maurier	29.9	1.3	1.0
3. Benson & Hedges	23.8	1.0	1.0
4. “Others” (not specified)	10.8	0.4	1.1

Ad Type: Danglers	Brand Share Of Danglers	% Distribution	Ave. # Danglers/Store
1. Players	41.4	0.1	1.0
2. “Others” (not specified)	27.6	0.1	1.0
3. Export A (excl. Smooth)	24.1	0.1	1.0

Ad Type: Other Forms	Brand Share Of Other Ads	% Distribution	Ave. # Ads/Store
1. du Maurier	76.1	2.6	1.0
2. Players	22.1	0.7	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..

2.3. Gas Convenience Chains/Gas Kiosks

Distribution - tobacco POS ads were still present in about one-third (34.1%) of gas stores we visited. This figure is essentially unchanged from measures taken in 1999 and 2000[13]. However, there has been a significant shift in position when it comes to which brand is the most advertised in these stores.

In 2002, "du Maurier" had the highest distribution of ads in these stores, up from third position in the last survey. The increase represents a significant gain in the percentage of gas stores carrying "du Maurier" ads today (21.4%, up from 8.3% in 2000). Indeed, "du Maurier" was about the only brand with POS promotional support material in gas stores. Ad distribution for other brands is well below "du Maurier" levels and, except for "Benson & Hedges" whose ad distribution is unchanged, well below levels of the previous survey.

1. du Maurier	• ads in 21.4% of stores
2. Benson & Hedges	• ads in 7.2% of stores
3. Players	• ads in 5.7% of stores
4. "Others" (not specified)	• ads in 5.4% of stores
5. Export A (excl. Smooth)	• ads in 4.8% of stores

Regionally, "du Maurier's" position as POS promotion leader is unchallenged. This being said, very few, if any, gas retailers across Atlantic Canada carried any branded tobacco advertising, and no gas retailers across Saskatchewan did so. Branded ads were more likely to be found in gas stores in Quebec, Ontario, Manitoba, Alberta and B.C.

Compared with results in 2000, "du Maurier" advertising was much more widely available this year in Quebec, Ontario, Alberta and B.C.

Brand Share of Ads – Branded POS material supporting "du Maurier" represented the bulk of tobacco brand advertising in the majority of cities where gas stores had ads. However, in selected markets, other brands advertised enough to challenge "du Maurier"'s lead position. "Benson & Hedges" had the most ads of any single brand in St. John's, NFLD. In Chicoutimi/Jonquiere and Montreal, "Players" was a factor. In Sherbrooke, Windsor, Red Deer, Calgary and Edmonton, the challenger was the "Other" brands not identified separately in the study. We cannot say if these "Other" brands represented one or several other products not separately identified, but ad distribution was relatively well-developed in gas stores in these cities and the "Others" share of ads was close to, if not higher than that of "du Maurier" in these stores.

Nationally, brand share of ads across gas station outlets ranked as follows:

1. du Maurier	46.1%
2. Benson & Hedges	15.4%
3. "Others" (not specified)	14.9%
4. Players	12.6%
5. Export A (excluding Smooth)	10.3%

[13] Ibid, p. 88

Average Number Of Ads Per Store - The most advertised tobacco brands in gas stores had about 1.0 ad pieces in such stores with ads. The average store, however, carried 1.5 pieces of tobacco POS advertising nationally, suggesting that a good number of gas stores with ads advertised more than one brand per store. These findings are similar to those of the last several surveys.

Table 32a - % Distribution and No. Of Ads Per Store By Brand By Type Weighted National Results - Gas Stations/Kiosks – 2002

Ad Availability Gas Sations/Kiosks	Total		C/T Display		Dangler		Poster		Shelf Talker		Other	
	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg	Proj Dist%	Proj Avg
Total	34.1	1.5	28.5	1.4	0.6	1.5	1.2	1.6	3.2	1.7	3.3	1.0
Belvedere	0.2	1.5	0.0	1.0	NA	NA	0.1	1.0	0.1	1.0	NA	NA
Benson & Hedges	7.2	1.0	6.3	1.0	0.1	1.0	NA	NA	1.0	1.0	NA	NA
Canadien Classics	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Du Maurier	21.4	1.0	16.5	1.0	0.2	1.0	0.3	1.1	2.0	1.1	3.0	1.0
Export A	4.8	1.0	4.7	1.0	0.1	1.0	NA	NA	NA	NA	NA	NA
Export A Smooth	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Remaining Export A	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Matinee	0.1	1.0	NA	NA	NA	NA	NA	NA	0.1	1.0	NA	NA
Players	5.7	1.1	3.9	1.0	0.2	1.3	0.2	1.0	1.4	1.0	0.2	1.0
Rothmans	0.0	1.0	NA	NA	NA	NA	NA	NA	0.0	1.0	NA	NA
Sportsman	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Other	5.4	1.3	4.5	1.2	0.1	1.5	0.7	1.7	0.5	1.0	0.1	1.0

Brand Advertising By Type Of Ad – Almost eighty percent (77.7%) of all tobacco POS ads found at gas station locations across the country were in the form of counter-top displays. The distribution and share of counter-top displays in gas stores is virtually identical to levels reported in 2000. The only change since that time is that shelf-talkers are slightly more in evidence now, accounting for 10.6% of ads (up from 3.0%). The gain is at the expense of "Other" ad forms, such as clocks and calendars.

Table 33 - Ad Type Importance Within Brand (% Share Of Brand Ads) Weighted National Results - Gas Stations/Kiosks – 2002

Share of Ads by Type Gas Stations/Kiosks	All Ads	C/T Display	Dangler	Poster	Shelf Talker	Other
Total	100.0	77.7	1.7	3.7	10.6	6.4
Belvedere	100.0	11.1	0.0	55.6	33.3	0.0
Benson & Hedges	100.0	85.7	0.8	0.0	13.5	0.0
Canadien Classics	NA	NA	NA	NA	NA	NA
Du Maurier	100.0	74.2	0.9	1.7	10.0	13.2
Export A	100.0	97.7	2.3	0.0	0.0	0.0
Export A Smooth	NA	NA	NA	NA	NA	NA
Remaining Export A	NA	NA	NA	NA	NA	NA
Matinee	100.0	0.0	0.0	0.0	100.0	0.0
Players	100.0	64.6	4.7	2.8	24.1	3.8
Rothmans	100.0	0.0	0.0	0.0	100.0	0.0
Sportsman	NA	NA	NA	NA	NA	NA
Other	100.0	73.3	2.4	16.7	6.4	1.2

Table 34 summarizes the top three 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 stations featuring at least one ad of that type and the average number of such ads per store carrying:

Table 34 - Weighted – Point-of-Sale Advertising: Tobacco Brands - Gas Stations/Kiosks All Cities – 2002

Ad Type: Counter-Top Displays	Brand Share Of CT Displays	% Distribution	Ave. # Displays/Store
1. du Maurier	44.7	16.5	1.0
2. Benson & Hedges	17.2	6.3	1.0
3. “Others” (not specified)	14.3	4.5	1.2
4. Export A (excl. Smooth)	13.1	4.7	1.0
5. Players	10.6	3.9	1.0

Ad Type: Posters	Brand Share Of Posters	% Distribution	Ave. # Posters/Store
1. “Others” (not specified)	63.6	0.7	1.7
2. du Maurier	19.7	0.3	1.1
3. Players	9.1	0.2	1.0
4. Belvedere	7.6	0.1	1.0

Ad Type: Shelf-Talkers	Brand Share Of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
1. du Maurier	41.9	2.0	1.1
2. Players	27.4	1.4	1.0
3. Benson & Hedges	18.8	1.0	1.0
4. “Others” (not specified)	8.6	0.5	1.0

Ad Type: Danglers	Brand Share Of Danglers	% Distribution	Ave. # Danglers/Store
1. Players	34.5	0.2	1.3
2. du Maurier	24.1	0.2	1.0
3. “Others” (not specified)	20.7	0.1	1.5
4. Export A (excl. Smooth)	13.8	0.1	1.0
5. Benson & Hedges	6.9	0.1	1.0

Ad Type: Other Forms	Brand Share Of Other Ads	% Distribution	Ave. # Ads/Store
1. du Maurier	90.4	3.0	1.0
2. Players	7.0	0.2	1.0

Note: Summary tables of advertising trends in gas convenience chains and kiosks by region and type of tobacco ad appear in the APPENDIX of this report.

CONCLUSION

Nationally, the percentage of retailers refusing to sell cigarettes to minors was 71.2%. There remains a nine-point gap between this figure and the government's stated goal to achieve minimum eighty percent compliance over the next several years. Since 1999, the percentage of retailers likely to refuse a sale has moved forward only marginally, and by an amount that is within the statistical margin of error. Closing the nine-point gap means more significant gains have to be made, and at faster pace than has been the case recently.

To achieve the target, efforts need to be focused. Campaigns need to be directed at those pockets of the retail population and those circumstances preventing overall compliance from rising above current levels and short of the eighty percent objective. The data from the latest survey has helped isolate remaining segments with lower compliance: boys continue to have an easier time than girls buying cigarettes, as do older teens; youngest clerks are more likely than older ones to be willing to sell to minors; compliance is weaker in independent convenience stores and gas station outlets than in other channels; Quebec continues to report the lowest rate of provincial compliance, while individual cities like Halifax, Bathurst, Montreal and Quebec City report retailer compliance levels lower than others visited.

At the same time that the latest data isolates where the most work remains to be done, it shows that the underpinnings of the posted national rate of compliance continue to strengthen. The data has identified several circumstances, regions and retail segments in which the eighty percent goal has already been reached and even surpassed. Despite a national compliance figure that suggests progress has been slow, the fact is that there are more segments of strength than there are of remaining weakness in the battle to drive retailer sales compliance higher. In 2002, two-thirds of the cities we visited already reported compliance rates about or above eighty percent. So too did vendors in three of the five retail classes of trade we visited. More than four-fifths of retailers refused to sell when fifteen year olds were involved, and a higher percentage of retailers than ever refused a sale outright, even without asking for ID.

The challenge of the next few years is to hold successes like these while registering gains across those variables where refusal rates remain below target. More needs to be done to improve retailer sales-to-minors compliance in a handful of Canada's largest cities, in independent stores and gas outlets, and when older teens are attempting to buy. Regarding other aspects of the tobacco laws, including the posting of health warning and age restriction signs, the majority of retailers are complying at least in part, but we are no closer to full and proper compliance than we were in 2000.

The results of the current survey should serve as point of departure for interested parties to understand where and why compliance gaps continue to exist, to understand regional differences and to debate demonstrated best practices. From such review and dialogue must emerge the strategies to drive retailer compliance with the tobacco laws to the next level.

APPENDIX

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

The following tables are included:

Tables A1 - A6: Tobacco Point-Of-Sale Advertising Indicators (Weighted)

Tables A7 – A9: Tobacco Point-of-Sale Advertising By Brand (Weighted)

Tables A10 – A14: Retailer Sales Compliance Under *Operation ID* By Class of Trade

Tobacco Point-of-Sale Advertising Indicators - (2002) - Weighted - All Classes of Trade

Table A - 1	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
Region	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL (All Cities)	32.7	1.7	0.7	1.5	1.1	1.2	3.7	1.6	28.0	79.8	1.6	3.1	9.6	1.7	2.5	5.4	1.2
NATIONAL (CORE 25)	33.4	1.7	0.7	1.4	1.1	1.3	3.8	1.7	28.5	79.4	1.6	3.3	9.9	1.7	2.6	5.5	1.2
ST. JOHN'S, NFLD	21.3	1.2	0.0	0.0	0.0	2.4	11.7	1.4	19.4	83.3	1.1	1.0	3.3	1.0	0.0	0.0	0.0
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NEW BRUNSWICK	1.1	1.0	0.0	0.0	0.0	0.6	50.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	50.0	1.0
NEW BRUNSWICK CORE	1.7	1.0	0.0	0.0	0.0	0.8	50.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	50.0	1.0
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	2.7	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	2.7	100.0	1.0
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	1.9	1.0	0.0	0.0	0.0	1.9	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NOVA SCOTIA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	56.1	1.8	1.5	1.6	1.1	0.6	0.8	1.2	49.2	82.5	1.7	8.2	14.9	1.8	0.2	0.2	1.1
CHIC/JONQUIERE	48.4	2.4	14.8	14.5	1.1	14.0	15.6	1.3	39.9	50.3	1.5	16.2	17.9	1.3	0.7	1.2	2.0
MONTREAL	53.8	1.6	1.2	1.3	1.0	0.0	0.0	0.0	45.3	78.1	1.5	9.8	20.6	1.8	0.0	0.0	0.0
QUEBEC CITY	66.7	2.1	0.5	0.3	1.0	0.8	0.5	1.0	65.8	97.7	2.1	1.3	1.3	1.5	0.0	0.0	0.0
SHERBROOKE	62.9	2.1	0.0	0.0	0.0	0.0	0.0	0.0	62.9	96.3	2.1	0.0	0.0	0.0	5.0	3.7	1.0
ONTARIO	26.5	1.6	0.3	0.7	1.1	2.3	9.8	1.8	20.0	68.8	1.5	0.9	3.1	1.5	6.5	17.6	1.2
ONTARIO CORE	27.1	1.6	0.2	0.4	1.0	2.7	11.1	1.8	20.0	65.9	1.4	0.9	3.1	1.5	7.2	19.5	1.2
KINGSTON	24.2	1.2	0.0	0.0	0.0	0.0	0.0	0.0	24.2	100.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
OTTAWA	30.3	1.2	0.0	0.0	0.0	0.4	0.9	1.0	30.0	99.1	1.2	0.0	0.0	0.0	0.0	0.0	0.0
ST. CATHARINES	22.8	1.6	1.3	4.8	1.3	0.0	0.0	0.0	20.4	82.6	1.5	1.3	6.6	2.0	2.2	6.0	1.0
SUDBURY	31.2	1.4	0.8	1.8	1.0	0.0	0.0	0.0	13.7	40.4	1.3	0.0	0.0	0.0	17.4	57.9	1.4
THUNDER BAY	17.9	3.4	0.0	0.0	0.0	0.0	0.0	0.0	16.9	97.8	3.5	0.0	0.0	0.0	1.0	1.1	1.0
TORONTO	23.9	1.6	0.2	0.5	1.0	0.0	0.0	0.0	18.0	70.4	1.5	1.0	3.5	1.4	8.6	25.7	1.2
WINDSOR	58.0	1.9	0.3	0.3	1.0	40.2	65.7	1.8	26.1	30.4	1.3	2.0	3.6	2.0	0.0	0.0	0.0
MANITOBA	31.3	1.4	0.0	0.0	0.0	0.2	0.6	2.0	30.7	94.2	1.4	1.0	5.2	2.2	0.0	0.0	0.0
BRANDON	8.0	3.8	0.0	0.0	0.0	2.0	11.8	2.0	2.0	5.9	1.0	8.0	76.5	3.0	0.0	0.0	0.0
WINNIPEG	33.3	1.4	0.0	0.0	0.0	0.0	0.0	0.0	33.1	99.0	1.4	0.4	1.0	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	41.5	1.8	2.1	3.7	1.3	1.5	2.6	1.2	38.0	84.0	1.6	5.1	9.5	1.4	0.1	0.2	1.0
ALBERTA CORE	41.1	1.8	1.9	3.4	1.3	1.4	2.4	1.3	37.7	84.2	1.6	5.3	10.0	1.4	0.0	0.0	0.0
CALGARY	42.6	1.8	0.0	0.0	0.0	0.0	0.0	0.0	42.6	100.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0
EDMONTON	40.7	1.8	3.8	6.7	1.3	1.1	2.0	1.3	34.8	71.0	1.5	10.8	20.2	1.4	0.0	0.0	0.0
MEDICINE HAT	29.9	1.7	2.0	5.0	1.0	18.3	45.0	1.3	17.7	50.0	1.4	1.6	2.5	1.0	0.0	0.0	0.0
RED DEER	50.8	1.8	5.7	9.0	1.5	4.9	6.0	1.0	46.1	82.1	1.6	0.0	0.0	0.0	2.9	3.0	1.0
BRITISH COLUMBIA	17.1	1.3	0.0	0.0	0.0	0.0	0.0	0.0	16.1	94.1	1.3	0.3	1.6	1.2	1.0	4.4	1.0
CAMPBELL RIVER	21.7	1.1	0.0	0.0	0.0	0.0	0.0	0.0	21.7	100.0	1.1	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER CMA	18.3	1.3	0.0	0.0	0.0	0.0	0.0	0.0	17.1	93.6	1.3	0.3	1.7	1.2	1.1	4.6	1.0
VANCOUVER 1	16.6	1.5	0.0	0.0	0.0	0.0	0.0	0.0	16.3	96.3	1.4	0.7	3.7	1.2	0.0	0.0	0.0
VANCOUVER 2	25.5	1.3	0.0	0.0	0.0	0.0	0.0	0.0	24.7	97.6	1.3	0.0	0.0	0.0	0.8	2.4	1.0
VANCOUVER 3	15.4	1.1	0.0	0.0	0.0	0.0	0.0	0.0	11.9	76.6	1.1	0.0	0.0	0.0	3.8	23.4	1.0
VANCOUVER 4	15.6	1.3	0.0	0.0	0.0	0.0	0.0	0.0	14.8	96.6	1.3	0.0	0.0	0.0	0.8	3.4	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, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North V ancouver, West Vancouver

Tobacco Point-of-Sale Advertising Indicators - (2002) - Weighted - Chain Convenience Stores

Table A - 2	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
Region	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL (All Cities)	57.8	1.8	1.9	2.0	1.1	1.5	2.9	2.0	52.0	83.1	1.7	5.3	8.0	1.6	3.7	4.0	1.1
NATIONAL (CORE 25)	61.0	1.8	2.0	2.0	1.1	1.6	3.0	2.1	54.7	83.0	1.7	5.7	8.0	1.6	4.0	4.0	1.1
ST. JOHN'S, NFLD	6.7	3.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	65.6	2.0	6.7	34.4	1.0	0.0	0.0	0.0
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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
NEW BRUNSWICK CORE	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	16.1	9.3	0.4	1.5	5.0	0.2	0.1	1.0	15.5	86.3	8.4	3.0	11.9	6.0	0.2	0.1	1.0
CHIC/JONQUIERE	30.0	5.3	30.0	18.8	1.0	10.0	6.3	1.0	30.0	68.8	3.7	10.0	6.3	1.0	0.0	0.0	0.0
MONTREAL	20.0	6.6	1.0	1.5	2.0	0.0	0.0	0.0	20.0	82.6	5.5	3.0	15.9	7.0	0.0	0.0	0.0
QUEBEC CITY	7.7	31.2	0.0	0.0	0.0	0.0	0.0	0.0	7.7	98.4	30.7	1.9	1.6	2.0	0.0	0.0	0.0
SHERBROOKE	50.0	5.3	0.0	0.0	0.0	0.0	0.0	0.0	50.0	97.6	5.1	0.0	0.0	0.0	6.3	2.4	1.0
ONTARIO	49.5	1.8	1.6	2.1	1.2	2.9	7.1	2.2	43.2	75.0	1.6	1.7	3.8	2.0	9.6	12.0	1.1
ONTARIO CORE	12.3	8.1	0.9	1.8	2.0	3.8	8.3	2.2	12.6	73.4	5.8	0.6	3.1	5.3	2.5	13.4	5.3
KINGSTON	11.8	4.5	0.0	0.0	0.0	0.0	0.0	0.0	11.8	100.0	4.5	0.0	0.0	0.0	0.0	0.0	0.0
OTTAWA	11.8	5.8	0.0	0.0	0.0	0.0	0.0	0.0	11.8	100.0	5.8	0.0	0.0	0.0	0.0	0.0	0.0
ST. CATHARINES	7.2	9.0	1.4	4.4	2.0	0.0	0.0	0.0	7.2	82.2	7.4	2.9	8.9	2.0	2.9	4.4	1.0
SUDBURY	11.1	8.0	11.1	12.4	1.0	0.0	0.0	0.0	11.1	62.9	5.0	0.0	0.0	0.0	11.1	24.7	2.0
THUNDER BAY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TORONTO	5.9	17.0	1.0	2.0	2.0	0.0	0.0	0.0	5.9	75.5	12.8	2.0	3.9	2.0	3.0	18.6	6.3
WINDSOR	23.2	6.3	1.8	1.2	1.0	33.9	51.2	2.2	23.2	45.1	2.8	1.8	2.5	2.0	0.0	0.0	0.0
MANITOBA	3.7	12.5	0.0	0.0	0.0	0.0	0.0	0.0	3.7	92.1	11.5	3.7	7.9	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	3.9	12.5	0.0	0.0	0.0	0.0	0.0	0.0	3.9	92.1	11.5	3.9	7.9	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	62.2	2.0	4.2	4.4	1.3	2.7	3.2	1.5	60.4	85.5	1.7	5.9	6.8	1.4	0.0	0.0	0.0
ALBERTA CORE	21.6	5.6	1.9	4.7	3.0	1.3	2.6	2.5	21.4	85.5	4.9	1.9	7.2	4.7	0.0	0.0	0.0
CALGARY	30.2	3.5	0.0	0.0	0.0	0.0	0.0	0.0	30.2	100.0	3.5	0.0	0.0	0.0	0.0	0.0	0.0
EDMONTON	12.8	10.8	3.8	8.3	3.0	2.6	4.6	2.5	12.8	75.0	8.1	3.8	12.0	4.3	0.0	0.0	0.0
MEDICINE HAT	25.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0	25.0	79.4	4.0	25.0	20.6	1.0	0.0	0.0	0.0
RED DEER	20.0	7.0	0.0	0.0	0.0	20.0	14.3	1.0	20.0	85.7	6.0	0.0	0.0	0.0	0.0	0.0	0.0
BRITISH COLUMBIA	53.3	1.8	0.0	0.0	0.0	0.0	0.0	0.0	51.5	94.6	1.8	4.4	5.5	1.2	0.0	0.0	0.0
CAMPBELL RIVER	16.7	5.0	0.0	0.0	0.0	0.0	0.0	0.0	16.7	100.0	5.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER CMA	20.1	5.2	0.0	0.0	0.0	0.0	0.0	0.0	20.1	94.3	4.9	1.0	5.7	6.0	0.0	0.0	0.0
VANCOUVER 1	32.6	4.4	0.0	0.0	0.0	0.0	0.0	0.0	32.6	90.3	4.0	2.3	9.7	6.0	0.0	0.0	0.0
VANCOUVER 2	18.5	6.6	0.0	0.0	0.0	0.0	0.0	0.0	18.5	100.0	6.6	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER 3	4.3	7.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3	100.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER 4	50.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	50.0	100.0	1.0	0.0	0.0	0.0	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, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North Vancouver, West Vancouver

Tobacco Point-of-Sale Advertising Indicators - (2002) - Weighted - Pharmacies

Table A-3	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
Region	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL (All Cities)	4.7	1.6	0.6	7.4	1.0	0.0	0.0	0.0	4.7	85.3	1.3	0.6	7.4	1.0	0.0	0.0	0.0
NATIONAL (CORE 25)	4.8	1.6	0.6	7.4	1.0	0.0	0.0	0.0	4.8	85.3	1.3	0.6	7.4	1.0	0.0	0.0	0.0
ST. JOHN'S, NFLD	13.8	1.2	0.0	0.0	0.0	0.0	0.0	0.0	13.8	100.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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
NEW BRUNSWICK CORE	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CHIC/JONQUIERE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MONTREAL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
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	0.0	0.0	0.0	0.0	0.0	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 CORE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
KINGSTON	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTTAWA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
THUNDER BAY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TORONTO	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	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	9.8	1.6	1.4	8.3	1.0	0.0	0.0	0.0	9.8	83.3	1.4	1.4	8.3	1.0	0.0	0.0	0.0
ALBERTA CORE	10.2	1.6	1.5	8.3	1.0	0.0	0.0	0.0	10.2	83.3	1.4	1.5	8.3	1.0	0.0	0.0	0.0
CALGARY	1.9	1.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0
EDMONTON	16.7	1.7	2.6	8.8	1.0	0.0	0.0	0.0	16.7	82.5	1.4	2.6	8.8	1.0	0.0	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	0.0	0.0	0.0
RED DEER	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BRITISH COLUMBIA	0.0	0.0	0.0	0.0	0.0	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
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
VANCOUVER CMA	0.0	0.0	0.0	0.0	0.0	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 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	0.0	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	0.0	0.0	0.0	0.0	0.0	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	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	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, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North V ancouver, West Vancouver

Tobacco Point-of-Sale Advertising Indicators - (2002) - Weighted - Gas Convenience Stores/Kiosks

Table A - 4	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
Region	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL (All Cities)	34.1	1.5	0.6	1.7	1.5	1.2	3.7	1.6	28.5	77.7	1.4	3.2	10.6	1.7	3.3	6.4	1.0
NATIONAL (CORE 25)	35.1	1.5	0.4	1.2	1.6	1.3	3.8	1.6	29.3	77.4	1.4	3.4	11.1	1.7	3.4	6.4	1.0
ST. JOHN'S, NFLD	22.5	1.3	0.0	0.0	0.0	2.5	7.1	1.0	22.5	85.7	1.1	2.5	7.1	1.0	0.0	0.0	0.0
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NEW BRUNSWICK	0.9	1.0	0.0	0.0	0.0	0.9	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NEW BRUNSWICK CORE	1.3	1.0	0.0	0.0	0.0	1.3	100.0	1.0	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	3.4	1.0	0.0	0.0	0.0	3.4	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NOVA SCOTIA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	47.7	1.7	0.4	0.7	1.3	0.8	1.4	1.4	40.8	78.6	1.5	8.4	19.1	1.8	0.1	0.1	1.0
CHIC/JONQUIERE	48.6	2.6	11.4	11.4	1.3	20.0	22.7	1.4	42.9	45.5	1.3	20.0	20.5	1.3	0.0	0.0	0.0
MONTREAL	41.6	1.5	0.0	0.0	0.0	0.0	0.0	0.0	32.7	69.5	1.3	9.9	30.8	1.9	0.0	0.0	0.0
QUEBEC CITY	68.6	2.0	0.0	0.0	0.0	0.0	0.0	0.0	68.6	99.1	1.9	1.4	0.9	1.0	0.0	0.0	0.0
SHERBROOKE	66.7	2.0	0.0	0.0	0.0	0.0	0.0	0.0	66.7	97.7	2.0	0.0	0.0	0.0	3.3	2.3	1.0
ONTARIO	31.4	1.4	0.2	0.4	1.0	2.0	8.0	1.8	22.4	67.5	1.3	0.6	2.7	2.0	9.6	21.3	1.0
ONTARIO CORE	34.4	1.4	0.0	0.0	0.0	2.4	8.8	1.8	24.2	65.6	1.3	0.7	3.0	2.0	11.0	22.6	1.0
KINGSTON	10.5	1.0	0.0	0.0	0.0	0.0	0.0	0.0	10.5	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0
OTTAWA	25.8	1.0	0.0	0.0	0.0	1.6	5.1	1.0	24.2	94.9	1.0	0.0	0.0	0.0	0.0	0.0	0.0
ST. CATHARINES	14.8	1.3	1.9	10.5	1.0	0.0	0.0	0.0	13.0	84.2	1.1	0.0	0.0	0.0	1.9	10.5	1.0
SUDBURY	23.5	1.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	22.2	1.0	0.0	0.0	0.0	17.6	77.8	1.0
THUNDER BAY	18.5	2.8	0.0	0.0	0.0	0.0	0.0	0.0	14.8	95.0	3.3	0.0	0.0	0.0	3.7	5.0	1.0
TORONTO	36.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	25.0	68.6	1.4	1.0	3.9	2.0	14.0	27.5	1.0
WINDSOR	44.2	2.1	0.0	0.0	0.0	32.6	66.7	1.9	25.6	33.3	1.2	0.0	0.0	0.0	0.0	0.0	0.0
MANITOBA	33.8	1.3	0.0	0.0	0.0	0.6	2.4	2.0	32.0	80.7	1.1	2.3	15.7	3.0	0.0	0.0	0.0
BRANDON	21.1	3.8	0.0	0.0	0.0	5.3	11.8	2.0	5.3	5.9	1.0	21.1	76.5	3.0	0.0	0.0	0.0
WINNIPEG	35.3	1.1	0.0	0.0	0.0	0.0	0.0	0.0	35.3	100.0	1.1	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	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	50.1	1.7	3.3	6.7	1.7	2.3	3.2	1.2	44.1	82.2	1.6	5.7	7.6	1.1	0.5	0.6	1.0
ALBERTA CORE	48.3	1.6	2.4	5.2	1.8	2.4	3.6	1.2	42.4	82.4	1.5	6.0	8.5	1.1	0.0	0.0	0.0
CALGARY	50.7	1.6	0.0	0.0	0.0	0.0	0.0	0.0	50.7	100.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0
EDMONTON	46.1	1.7	5.3	11.7	1.7	0.0	0.0	0.0	36.8	69.3	1.5	13.2	19.0	1.1	0.0	0.0	0.0
MEDICINE HAT	45.8	1.7	0.0	0.0	0.0	37.5	55.0	1.2	20.8	40.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0
RED DEER	81.8	1.9	18.2	16.7	1.5	0.0	0.0	0.0	72.7	75.0	1.6	0.0	0.0	0.0	9.1	5.6	1.0
BRITISH COLUMBIA	29.6	1.2	0.0	0.0	0.0	0.0	0.0	0.0	29.6	98.5	1.1	0.0	0.0	0.0	0.4	1.5	1.0
CAMPBELL RIVER	39.1	1.0	0.0	0.0	0.0	0.0	0.0	0.0	39.1	100.0	1.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER CMA	33.2	1.2	0.0	0.0	0.0	0.0	0.0	0.0	33.2	98.4	1.2	0.0	0.0	0.0	0.5	1.6	1.0
VANCOUVER 1	38.5	1.2	0.0	0.0	0.0	0.0	0.0	0.0	38.5	100.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER 2	34.5	1.1	0.0	0.0	0.0	0.0	0.0	0.0	34.5	100.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER 3	25.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	25.0	96.2	1.1	0.0	0.0	0.0	1.7	7.7	1.0
VANCOUVER 4	36.7	1.4	0.0	0.0	0.0	0.0	0.0	0.0	36.7	100.0	1.4	0.0	0.0	0.0	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, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North V ancouver, West Vancouver

Tobacco Point-of-Sale Advertising Indicators - (2002) - Weighted - Grocery Supermarkets

Table A - 5	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
Region	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL (All Cities)	12.0	2.5	2.3	7.7	1.0	0.3	1.8	2.0	7.2	56.1	2.3	5.6	34.3	1.8	0.0	0.0	0.0
NATIONAL (CORE 25)	12.6	2.5	2.4	7.7	1.0	0.3	1.8	2.0	7.5	56.1	2.3	5.9	34.3	1.8	0.0	0.0	0.0
ST. JOHN'S, NFLD	10.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	10.0	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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
NEW BRUNSWICK CORE	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	20.8	3.9	6.6	8.0	1.0	0.5	0.7	1.0	18.2	56.9	2.6	15.1	34.4	1.9	0.0	0.0	0.0
CHIC/JONQUIERE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MONTREAL	19.0	5.2	9.0	9.1	1.0	0.0	0.0	0.0	19.0	52.5	2.7	20.0	38.4	1.9	0.0	0.0	0.0
QUEBEC CITY	23.2	2.3	0.0	0.0	0.0	2.9	5.5	1.0	23.2	89.0	2.0	2.9	5.5	1.0	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	0.3	7.0	0.0	0.0	0.0	0.3	57.5	4.0	0.3	13.8	1.0	0.3	28.8	2.0	0.0	0.0	0.0
ONTARIO CORE	0.4	7.0	0.0	0.0	0.0	0.4	57.5	4.0	0.4	13.8	1.0	0.4	28.8	2.0	0.0	0.0	0.0
KINGSTON	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTTAWA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
THUNDER BAY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TORONTO	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WINDSOR	14.3	7.0	0.0	0.0	0.0	14.3	57.5	4.0	14.3	13.8	1.0	14.3	28.8	2.0	0.0	0.0	0.0
MANITOBA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	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	8.8	1.2	0.7	6.5	1.0	0.0	0.0	0.0	5.9	54.1	1.0	2.9	39.4	1.5	0.0	0.0	0.0
ALBERTA CORE	6.1	1.9	0.7	6.5	1.0	0.0	0.0	0.0	6.2	54.1	1.0	3.0	39.4	1.5	0.0	0.0	0.0
CALGARY	2.2	1.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0
EDMONTON	10.0	2.0	1.4	7.1	1.0	0.0	0.0	0.0	10.0	50.0	1.0	5.7	42.9	1.5	0.0	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	0.0	0.0	0.0
RED DEER	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BRITISH COLUMBIA	0.0	0.0	0.0	0.0	0.0	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
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
VANCOUVER CMA	0.0	0.0	0.0	0.0	0.0	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 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	0.0	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	0.0	0.0	0.0	0.0	0.0	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	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	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

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Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North V ancouver, West Vancouver

Tobacco Point-of-Sale Advertising Indicators - (2002) - Weighted - Independent Convenience Stores

Table A - 6	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
Region	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL (All Cities)	33.0	1.6	0.3	0.6	1.1	1.5	4.2	1.6	28.3	81.1	1.6	2.6	7.8	1.7	2.6	6.2	1.3
NATIONAL (CORE 25)	33.6	1.6	0.3	0.6	1.1	1.5	4.4	1.6	28.8	80.7	1.5	2.7	8.0	1.7	2.7	6.3	1.3
ST. JOHN'S, NFLD	26.9	1.2	0.0	0.0	0.0	4.3	18.8	1.5	23.7	81.3	1.1	0.0	0.0	0.0	0.0	0.0	0.0
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NEW BRUNSWICK	1.5	1.0	0.0	0.0	0.0	0.5	33.3	1.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	66.7	1.0
NEW BRUNSWICK CORE	2.2	1.0	0.0	0.0	0.0	0.7	33.3	1.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	66.7	1.0
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	4.9	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	4.9	100.0	1.0
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	1.6	1.0	0.0	0.0	0.0	1.6	100.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NOVA SCOTIA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	57.9	1.7	0.8	0.9	1.1	0.7	0.9	1.2	52.7	86.4	1.6	6.1	11.4	1.8	0.3	0.3	1.2
CHIC/JONQUIERE	51.9	2.5	17.3	15.0	1.1	14.8	14.2	1.3	42.0	49.6	1.5	18.5	18.6	1.3	1.2	1.8	2.0
MONTREAL	55.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	49.0	84.3	1.4	7.0	15.7	1.9	0.0	0.0	0.0
QUEBEC CITY	69.1	2.1	0.8	0.5	1.0	0.8	0.5	1.0	67.5	97.8	2.1	0.8	1.1	2.0	0.0	0.0	0.0
SHERBROOKE	71.1	2.0	0.0	0.0	0.0	0.0	0.0	0.0	71.1	95.2	1.9	0.0	0.0	0.0	6.7	4.8	1.0
ONTARIO	22.8	1.6	0.1	0.2	1.0	2.5	11.4	1.7	16.6	66.7	1.5	0.9	2.8	1.2	5.5	18.9	1.3
ONTARIO CORE	22.6	1.6	0.0	0.0	0.0	2.8	13.0	1.7	15.9	63.0	1.5	0.9	2.8	1.1	5.9	21.2	1.3
KINGSTON	32.3	1.1	0.0	0.0	0.0	0.0	0.0	0.0	32.3	100.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0
OTTAWA	30.6	1.2	0.0	0.0	0.0	0.0	0.0	0.0	30.6	100.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
ST. CATHARINES	23.0	1.6	1.1	2.9	1.0	0.0	0.0	0.0	19.5	84.1	1.5	1.1	5.8	2.0	2.3	5.8	1.0
SUDBURY	37.7	1.4	0.0	0.0	0.0	0.0	0.0	0.0	17.0	40.0	1.2	0.0	0.0	0.0	20.8	60.0	1.5
THUNDER BAY	22.6	3.6	0.0	0.0	0.0	0.0	0.0	0.0	22.6	100.0	3.6	0.0	0.0	0.0	0.0	0.0	0.0
TORONTO	18.3	1.7	0.0	0.0	0.0	0.0	0.0	0.0	13.5	68.8	1.6	1.0	3.2	1.0	6.7	28.2	1.3
WINDSOR	60.9	1.8	0.0	0.0	0.0	45.7	71.8	1.7	21.7	23.9	1.2	2.2	3.8	2.0	0.0	0.0	0.0
MANITOBA	47.5	1.5	0.0	0.0	0.0	0.0	0.0	0.0	47.5	100.0	1.5	0.0	0.0	0.0	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	50.7	1.5	0.0	0.0	0.0	0.0	0.0	0.0	50.7	100.0	1.5	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	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	55.1	1.8	1.1	1.0	1.0	1.8	2.0	1.1	50.3	85.6	1.7	7.2	11.4	1.6	0.0	0.0	0.0
ALBERTA CORE	55.2	1.8	1.1	1.0	1.0	1.7	1.9	1.2	50.5	85.3	1.7	7.5	11.7	1.6	0.0	0.0	0.0
CALGARY	59.3	1.8	0.0	0.0	0.0	0.0	0.0	0.0	59.3	100.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0
EDMONTON	52.8	1.8	1.9	2.1	1.0	1.9	2.1	1.0	43.4	68.1	1.5	17.0	28.2	1.6	0.0	0.0	0.0
MEDICINE HAT	31.3	1.8	6.3	14.3	1.0	18.8	42.9	1.3	18.8	42.9	1.3	0.0	0.0	0.0	0.0	0.0	0.0
RED DEER	50.0	1.7	0.0	0.0	0.0	7.1	6.3	1.0	42.9	93.8	1.8	0.0	0.0	0.0	0.0	0.0	0.0
BRITISH COLUMBIA	15.5	1.2	0.0	0.0	0.0	0.0	0.0	0.0	13.6	89.7	1.2	0.0	0.0	0.0	1.8	9.7	1.0
CAMPBELL RIVER	14.3	1.0	0.0	0.0	0.0	0.0	0.0	0.0	14.3	100.0	1.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER CMA	16.4	1.2	0.0	0.0	0.0	0.0	0.0	0.0	14.4	89.5	1.2	0.0	0.0	0.0	2.0	9.9	1.0
VANCOUVER 1	12.7	1.3	0.0	0.0	0.0	0.0	0.0	0.0	12.7	100.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER 2	26.7	1.2	0.0	0.0	0.0	0.0	0.0	0.0	25.0	94.8	1.2	0.0	0.0	0.0	1.7	5.2	1.0
VANCOUVER 3	18.3	1.0	0.0	0.0	0.0	0.0	0.0	0.0	10.0	55.2	1.0	0.0	0.0	0.0	8.3	44.8	1.0
VANCOUVER 4	9.7	1.3	0.0	0.0	0.0	0.0	0.0	0.0	8.1	88.9	1.4	0.0	0.0	0.0	1.6	11.1	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
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Vancouver 4: North V ancouver, West Vancouver

Tobacco Point-of-Sale Advertising in Chain Convenience Stores (2002) - Weighted - All Ads

Table A-7	Belvedere		Benson & Hedges		Canadien Classics		Du Maurier		Export A		Export A Smooth		Remaining Export A		Matinee		Players		Rothmans		Sportsman		Other	
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	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL (All Cities)	0.1	0.1	6.5	6.4	0.1	0.1	39.8	43.6	12.5	12.8	0.6	0.6	0.0	0.0	0.1	0.1	18.1	18.8	0.0	0.0	0.0	0.0	14.4	17.6
NATIONAL (CORE 25)	0.1	0.1	6.5	6.2	0.1	0.1	41.2	42.7	13.8	13.3	0.6	0.6	0.0	0.0	0.1	0.1	20.0	19.6	0.0	0.0	0.0	0.0	15.1	17.5
ST. JOHN'S, NFLD	0.0	0.0	6.7	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NEW BRUNSWICK CORE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	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	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	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NOVA SCOTIA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	0.2	0.1	10.7	7.6	0.2	0.2	49.8	36.0	21.4	15.8	1.6	1.2	0.0	0.0	0.0	0.0	32.9	25.0	0.0	0.0	0.0	0.0	19.0	14.2
CHIC/JONQUIERE	0.0	0.0	20.0	12.5	0.0	0.0	60.0	37.5	40.0	25.0	0.0	0.0	0.0	0.0	0.0	0.0	40.0	25.0	0.0	0.0	0.0	0.0	0.0	0.0
MONTREAL	0.0	0.0	10.0	7.6	0.0	0.0	46.0	35.6	18.0	14.4	2.0	1.5	0.0	0.0	0.0	0.0	32.0	25.8	0.0	0.0	0.0	0.0	20.0	15.2
QUEBEC CITY	0.0	0.0	5.8	3.4	1.9	1.1	63.5	39.1	36.5	21.8	0.0	0.0	0.0	0.0	0.0	0.0	44.2	28.7	0.0	0.0	0.0	0.0	7.7	5.7
SHERBROOKE	6.3	2.4	43.8	16.7	0.0	0.0	87.5	33.3	37.5	14.3	0.0	0.0	0.0	0.0	0.0	0.0	6.3	4.8	0.0	0.0	0.0	0.0	50.0	28.6
ONTARIO	0.0	0.0	6.9	7.7	0.0	0.0	38.0	51.7	5.6	6.3	0.0	0.0	0.0	0.0	0.0	0.0	13.5	15.7	0.0	0.0	0.0	0.0	10.8	18.7
ONTARIO CORE	0.0	0.0	6.8	6.8	0.0	0.0	40.9	50.3	7.1	7.1	0.0	0.0	0.0	0.0	0.0	0.0	17.0	17.0	0.0	0.0	0.0	0.0	12.0	18.8
KINGSTON	0.0	0.0	5.9	11.1	0.0	0.0	29.4	55.6	5.9	11.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.8	22.2
OTTAWA	0.0	0.0	0.0	0.0	0.0	0.0	35.3	54.3	7.8	11.4	0.0	0.0	0.0	0.0	0.0	0.0	11.8	17.1	0.0	0.0	0.0	0.0	11.8	17.1
ST. CATHARINES	0.0	0.0	8.7	13.3	0.0	0.0	33.3	60.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	8.9	0.0	0.0	0.0	0.0	7.2	17.8
SUDBURY	0.0	0.0	0.0	0.0	0.0	0.0	33.3	37.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.1	12.5	0.0	0.0	0.0	0.0	11.1	50.0
THUNDER BAY	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TORONTO	0.0	0.0	9.9	9.8	0.0	0.0	44.6	56.9	7.9	7.8	0.0	0.0	0.0	0.0	0.0	0.0	19.8	19.6	0.0	0.0	0.0	0.0	5.9	5.9
WINDSOR	0.0	0.0	0.0	0.0	0.0	0.0	28.6	20.7	1.8	1.2	0.0	0.0	0.0	0.0	0.0	0.0	8.9	6.1	0.0	0.0	0.0	0.0	50.0	72.0
MANITOBA	0.0	0.0	5.6	12.0	0.0	0.0	26.0	60.0	5.6	12.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	8.0	0.0	0.0	0.0	0.0	3.7	8.0
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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WINNIPEG	0.0	0.0	5.9	12.0	0.0	0.0	27.5	60.0	5.9	12.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	8.0	0.0	0.0	0.0	0.0	3.9	8.0
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	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	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ALBERTA	0.0	0.0	2.4	2.4	0.0	0.0	45.0	42.9	15.5	14.1	0.6	0.5	0.0	0.0	0.6	0.5	19.8	17.7	0.0	0.0	0.0	0.0	23.0	21.9
ALBERTA CORE	0.0	0.0	2.5	2.5	0.0	0.0	44.4	42.2	15.2	14.1	0.6	0.5	0.0	0.0	0.6	0.5	20.7	18.6	0.0	0.0	0.0	0.0	22.3	21.6
CALGARY	0.0	0.0	1.2	1.1	0.0	0.0	48.8	46.7	5.8	5.6	0.0	0.0	0.0	0.0	0.0	0.0	11.6	11.1	0.0	0.0	0.0	0.0	30.2	35.6
EDMONTON	0.0	0.0	3.8	3.7	0.0	0.0	39.7	38.9	23.1	19.4	1.3	0.9	0.0	0.0	1.3	0.9	29.5	24.1	0.0	0.0	0.0	0.0	15.4	12.0
MEDICINE HAT	0.0	0.0	0.0	0.0	0.0	0.0	50.0	40.0	50.0	40.0	0.0	0.0	0.0	0.0	0.0	0.0	25.0	20.0	0.0	0.0	0.0	0.0	0.0	0.0
RED DEER	0.0	0.0	0.0	0.0	0.0	0.0	60.0	57.1	20.0	14.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	40.0	28.6
BRITISH COLUMBIA	0.0	0.0	0.9	0.9	0.0	0.0	43.5	46.4	23.9	24.5	0.0	0.0	0.0	0.0	0.0	0.0	3.6	3.6	0.0	0.0	0.0	0.0	17.8	24.5
CAMPBELL RIVER	0.0	0.0	0.0	0.0	0.0	0.0	66.7	80.0	16.7	20.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	1.0	0.9	0.0	0.0	45.0	45.0	25.8	24.7	0.0	0.0	0.0	0.0	0.0	0.0	4.0	3.8	0.0	0.0	0.0	0.0	19.9	25.6
VANCOUVER 1	0.0	0.0	0.0	0.0	0.0	0.0	58.1	43.5	30.2	21.0	0.0	0.0	0.0	0.0	0.0	0.0	9.3	6.5	0.0	0.0	0.0	0.0	32.6	29.0
VANCOUVER 2	0.0	0.0	3.7	3.0	0.0	0.0	48.1	39.4	40.7	33.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	18.5	24.2
VANCOUVER 3	0.0	0.0	0.0	0.0	0.0	0.0	17.4	57.1	8.7	28.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3	14.3
VANCOUVER 4	0.0	0.0	0.0	0.0	0.0	0.0	50.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North Vancouver, West Vancouver

Tobacco Point-of-Sale Advertising in Gas Convenience Stores/Kiosks (2002) - Weighted - All Ads

Table A-8	Belvedere		Benson & Hedges		Canadien Classics		Du Maurier		Export A		Export A Smooth		Remaining Export A		Matinee		Players		Rothmans		Sportsman		Other	
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	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL (All Cities)	0.2	0.5	7.2	15.4	0.0	0.0	21.4	46.1	4.8	10.3	0.0	0.0	0.0	0.0	0.1	0.1	5.7	12.6	0.0	0.1	0.0	0.0	5.4	14.9
NATIONAL (CORE 25)	0.2	0.6	7.4	15.5	0.0	0.0	22.1	46.6	4.9	10.3	0.0	0.0	0.0	0.0	0.1	0.1	6.0	12.8	0.0	0.1	0.0	0.0	5.2	14.1
ST. JOHN'S, NFLD	2.5	16.7	5.0	33.3	0.0	0.0	2.5	16.7	2.5	16.7	0.0	0.0	0.0	0.0	0.0	0.0	2.5	16.7	0.0	0.0	0.0	0.0	0.0	0.0
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.9	100.0
NEW BRUNSWICK CORE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	100.0
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	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	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	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	0.0	0.0	0.0	0.0	0.0	3.4	100.0
NOVA SCOTIA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	0.6	1.3	9.8	15.4	0.0	0.0	24.6	37.6	9.4	14.0	0.0	0.0	0.0	0.0	0.0	0.0	13.7	20.7	0.1	0.2	0.0	0.0	6.9	10.8
CHIC/JONQUIERE	14.3	18.2	5.7	4.5	0.0	0.0	31.4	31.8	11.4	11.4	0.0	0.0	0.0	0.0	0.0	0.0	28.6	31.8	2.9	2.3	0.0	0.0	0.0	0.0
MONTREAL	0.0	0.0	7.9	14.5	0.0	0.0	22.8	38.7	6.9	11.3	0.0	0.0	0.0	0.0	0.0	0.0	14.9	24.2	0.0	0.0	0.0	0.0	6.9	11.3
QUEBEC CITY	0.0	0.0	17.1	24.0	0.0	0.0	24.3	34.0	17.1	24.0	0.0	0.0	0.0	0.0	0.0	0.0	8.6	12.0	0.0	0.0	0.0	0.0	4.3	6.0
SHERBROOKE	0.0	0.0	16.7	12.5	0.0	0.0	56.7	42.5	20.0	15.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	26.7	30.0
ONTARIO	0.0	0.0	8.5	18.9	0.0	0.0	21.3	49.6	4.4	11.2	0.0	0.0	0.0	0.0	0.0	0.0	3.6	8.0	0.0	0.0	0.0	0.0	3.2	12.2
ONTARIO CORE	0.0	0.0	9.6	19.8	0.0	0.0	23.3	49.8	4.8	11.5	0.0	0.0	0.0	0.0	0.0	0.0	3.6	7.4	0.0	0.0	0.0	0.0	2.9	11.6
KINGSTON	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.5	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTTAWA	0.0	0.0	0.0	0.0	0.0	0.0	19.4	75.0	1.6	6.2	0.0	0.0	0.0	0.0	0.0	0.0	1.6	6.2	0.0	0.0	0.0	0.0	3.2	12.5
ST. CATHARINES	0.0	0.0	0.0	0.0	0.0	0.0	11.1	70.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	10.0	0.0	0.0	0.0	0.0	3.7	20.0
SUDBURY	0.0	0.0	0.0	0.0	0.0	0.0	14.7	62.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	25.0	0.0	0.0	0.0	0.0	2.9	12.5
THUNDER BAY	0.0	0.0	11.1	21.4	0.0	0.0	18.5	35.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.1	21.4	0.0	0.0	0.0	0.0	11.1	21.4
TORONTO	0.0	0.0	13.0	25.5	0.0	0.0	26.0	52.9	6.0	13.7	0.0	0.0	0.0	0.0	0.0	0.0	4.0	7.8	0.0	0.0	0.0	0.0	0.0	0.0
WINDSOR	0.0	0.0	0.0	0.0	0.0	0.0	7.0	10.3	2.3	2.6	0.0	0.0	0.0	0.0	0.0	0.0	2.3	2.6	0.0	0.0	0.0	0.0	34.9	84.6
MANITOBA	0.0	0.0	5.8	16.3	0.0	0.0	25.3	63.4	3.9	9.2	0.0	0.0	0.0	0.0	1.1	2.7	3.0	8.4	0.0	0.0	0.0	0.0	0.0	0.0
BRANDON	0.0	0.0	5.3	20.0	0.0	0.0	15.8	40.0	0.0	0.0	0.0	0.0	0.0	0.0	10.5	13.3	15.8	26.7	0.0	0.0	0.0	0.0	0.0	0.0
WINNIPEG	0.0	0.0	5.9	15.4	0.0	0.0	26.5	69.2	4.4	11.5	0.0	0.0	0.0	0.0	0.0	0.0	1.5	3.8	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	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	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ALBERTA	0.0	0.0	11.2	14.1	0.0	0.0	31.7	41.1	4.1	4.9	0.0	0.0	0.0	0.0	0.0	0.0	4.7	7.6	0.0	0.0	0.0	0.0	18.8	32.4
ALBERTA CORE	0.0	0.0	10.8	13.6	0.0	0.0	31.4	43.1	3.3	4.1	0.0	0.0	0.0	0.0	0.0	0.0	5.0	8.5	0.0	0.0	0.0	0.0	17.2	30.7
CALGARY	0.0	0.0	15.1	18.6	0.0	0.0	34.2	44.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.8	37.3
EDMONTON	0.0	0.0	7.9	10.2	0.0	0.0	27.6	40.7	6.6	8.5	0.0	0.0	0.0	0.0	0.0	0.0	7.9	13.6	0.0	0.0	0.0	0.0	18.4	27.1
MEDICINE HAT	0.0	0.0	0.0	0.0	0.0	0.0	37.5	52.6	4.2	5.3	0.0	0.0	0.0	0.0	0.0	0.0	20.8	36.8	0.0	0.0	0.0	0.0	4.2	5.3
RED DEER	0.0	0.0	18.2	17.6	0.0	0.0	36.4	23.5	18.2	11.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	45.5	47.1
BRITISH COLUMBIA	0.0	0.0	1.1	3.1	0.0	0.0	25.8	76.1	1.4	4.1	0.0	0.0	0.0	0.0	0.0	0.0	2.5	8.4	0.0	0.0	0.0	0.0	2.8	8.2
CAMPBELL RIVER	0.0	0.0	4.3	11.1	0.0	0.0	26.1	66.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3	11.1	0.0	0.0	0.0	0.0	4.3	11.1
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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER CMA	0.0	0.0	1.0	2.5	0.0	0.0	29.5	76.9	1.7	4.4	0.0	0.0	0.0	0.0	0.0	0.0	2.7	8.2	0.0	0.0	0.0	0.0	3.1	8.0
VANCOUVER 1	0.0	0.0	1.9	4.2	0.0	0.0	32.7	70.8	3.8	8.3	0.0	0.0	0.0	0.0	0.0	0.0	3.8	8.3	0.0	0.0	0.0	0.0	3.8	8.3
VANCOUVER 2	0.0	0.0	0.0	0.0	0.0	0.0	34.5	90.9	1.7	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	4.5
VANCOUVER 3	0.0	0.0	0.0	0.0	0.0	0.0	20.0	76.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.0	23.5	0.0	0.0	0.0	0.0	0.0	0.0
VANCOUVER 4	0.0	0.0	3.3	6.7	0.0	0.0	33.3	66.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.3	26.7

% 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, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North Vancouver, West Vancouver

Tobacco Point-of-Sale Advertising in Independent Convenience Stores (2002) - Weighted - All Ads

Table A-9	Belvedere		Benson & Hedges		Canadien Classics		Du Maurier		Export A		Export A Smooth		Remaining Export A		Matinee		Players		Rothmans		Sportsman		Other	
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	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr	% Dist	Brand Shr
NATIONAL (All Cities)	0.1	0.3	6.1	12.4	0.0	0.0	17.6	37.6	4.8	9.7	0.0	0.0	0.0	0.0	0.0	0.0	6.1	13.3	0.0	0.1	0.0	0.0	10.5	26.7
NATIONAL (CORE 25)	0.1	0.3	6.2	12.4	0.0	0.0	17.6	37.4	5.0	10.1	0.0	0.0	0.0	0.0	0.0	0.0	6.2	13.3	0.0	0.1	0.0	0.0	10.4	26.6
ST. JOHN'S, NFLD	2.2	7.1	14.0	50.0	0.0	0.0	6.5	21.4	1.1	3.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	17.9
CHARLOTTETOWN, P.E.I.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	1.0	66.7	0.0	0.0	0.0	0.0	0.5	33.3
NEW BRUNSWICK CORE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	66.7	0.0	0.0	0.0	0.0	0.7	33.3
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	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	4.9	100.0	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	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	0.0	0.0	0.0	0.0	0.0	1.6	100.0
NOVA SCOTIA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HALIFAX	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
QUEBEC	0.2	0.5	12.0	14.8	0.0	0.0	26.0	33.4	10.5	12.7	0.0	0.0	0.0	0.0	0.0	0.0	12.6	16.1	0.1	0.1	0.0	0.0	16.8	22.5
CHIC/JONQUIERE	6.2	7.6	6.2	4.8	0.0	0.0	27.2	27.6	16.0	14.3	0.0	0.0	0.0	0.0	0.0	0.0	32.1	41.0	2.5	1.9	0.0	0.0	3.7	2.9
MONTREAL	0.0	0.0	11.0	14.1	0.0	0.0	23.0	32.1	8.0	10.3	0.0	0.0	0.0	0.0	0.0	0.0	12.0	15.4	0.0	0.0	0.0	0.0	20.0	28.2
QUEBEC CITY	0.0	0.0	17.1	21.9	0.0	0.0	33.3	39.0	17.9	21.0	0.0	0.0	0.0	0.0	0.0	0.0	12.2	14.3	0.0	0.0	0.0	0.0	2.4	3.8
SHERBROOKE	0.0	0.0	15.6	11.1	0.0	0.0	53.3	38.1	22.2	15.9	0.0	0.0	0.0	0.0	0.0	0.0	4.4	3.2	0.0	0.0	0.0	0.0	33.3	31.7
ONTARIO	0.0	0.0	3.7	9.9	0.0	0.0	15.9	46.6	2.9	7.8	0.0	0.0	0.0	0.0	0.0	0.0	4.3	13.4	0.0	0.0	0.0	0.0	5.8	22.3
ONTARIO CORE	0.0	0.0	3.4	9.3	0.0	0.0	15.5	46.9	3.2	8.8	0.0	0.0	0.0	0.0	0.0	0.0	4.1	13.2	0.0	0.0	0.0	0.0	5.1	21.7
KINGSTON	0.0	0.0	0.0	0.0	0.0	0.0	16.1	45.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	9.1	0.0	0.0	0.0	0.0	16.1	45.5
OTTAWA	0.0	0.0	2.0	5.6	0.0	0.0	18.4	50.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	11.1	0.0	0.0	0.0	0.0	12.2	33.3
ST. CATHARINES	0.0	0.0	3.4	9.7	0.0	0.0	19.5	61.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	6.5	0.0	0.0	0.0	0.0	8.0	22.6
SUDBURY	0.0	0.0	3.8	7.1	0.0	0.0	24.5	46.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.3	21.4	0.0	0.0	0.0	0.0	11.3	25.0
THUNDER BAY	0.0	0.0	19.4	24.0	0.0	0.0	22.6	28.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	19.4	24.0	0.0	0.0	0.0	0.0	19.4	24.0
TORONTO	0.0	0.0	3.8	12.5	0.0	0.0	15.4	56.3	3.8	12.5	0.0	0.0	0.0	0.0	0.0	0.0	3.8	15.6	0.0	0.0	0.0	0.0	1.0	3.1
WINDSOR	0.0	0.0	0.0	0.0	0.0	0.0	8.7	10.0	2.2	2.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3	4.0	0.0	0.0	0.0	0.0	45.7	84.0
MANITOBA	0.0	0.0	7.9	11.1	0.0	0.0	31.7	50.0	1.3	1.9	0.0	0.0	0.0	0.0	0.0	0.0	5.3	9.3	0.0	0.0	0.0	0.0	15.8	27.8
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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WINNIPEG	0.0	0.0	8.5	11.1	0.0	0.0	33.8	50.0	1.4	1.9	0.0	0.0	0.0	0.0	0.0	0.0	5.6	9.3	0.0	0.0	0.0	0.0	16.9	27.8
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	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	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ALBERTA	0.0	0.0	10.6	11.4	0.0	0.0	26.5	28.5	6.4	7.2	0.0	0.0	0.0	0.0	0.0	0.0	9.5	9.5	0.0	0.0	0.0	0.0	29.1	43.4
ALBERTA CORE	0.0	0.0	10.9	11.7	0.0	0.0	26.7	28.6	6.4	7.2	0.0	0.0	0.0	0.0	0.0	0.0	9.5	9.5	0.0	0.0	0.0	0.0	28.4	42.9
CALGARY	0.0	0.0	11.0	10.1	0.0	0.0	31.9	30.3	2.2	2.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9	9.1	0.0	0.0	0.0	0.0	34.1	48.5
EDMONTON	0.0	0.0	11.3	14.0	0.0	0.0	20.8	24.0	11.3	14.0	0.0	0.0	0.0	0.0	0.0	0.0	9.4	10.0	0.0	0.0	0.0	0.0	24.5	38.0
MEDICINE HAT	0.0	0.0	6.3	11.1	0.0	0.0	25.0	66.7	6.3	11.1	0.0	0.0	0.0	0.0	0.0	0.0	6.3	11.1	0.0	0.0	0.0	0.0	0.0	0.0
RED DEER	0.0	0.0	0.0	0.0	0.0	0.0	21.4	25.0	7.1	8.3	0.0	0.0	0.0	0.0	0.0	0.0	7.1	8.3	0.0	0.0	0.0	0.0	50.0	58.3
BRITISH COLUMBIA	0.0	0.0	1.0	5.6	0.0	0.0	6.5	35.4	1.4	9.5	0.0	0.0	0.0	0.0	0.0	0.0	0.3	1.7	0.0	0.0	0.0	0.0	7.0	47.8
CAMPBELL RIVER	0.0	0.0	0.0	0.0	0.0	0.0	14.3	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	1.1	5.7	0.0	0.0	6.6	33.9	1.5	9.7	0.0	0.0	0.0	0.0	0.0	0.0	0.3	1.8	0.0	0.0	0.0	0.0	7.6	48.9
VANCOUVER 1	0.0	0.0	1.6	10.0	0.0	0.0	3.2	20.0	1.6	10.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	60.0
VANCOUVER 2	0.0	0.0	0.0	0.0	0.0	0.0	10.0	31.6	3.3	15.8	0.0	0.0	0.0	0.0	0.0	0.0	1.7	5.3	0.0	0.0	0.0	0.0	15.0	47.4
VANCOUVER 3	0.0	0.0	0.0	0.0	0.0	0.0	13.3	72.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.0	27.3
VANCOUVER 4	0.0	0.0	3.2	25.0	0.0	0.0	4.8	37.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	37.5

% 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, Pit Meadows, New Westminster
Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock
Vancouver 4: North V ancouver, West Vancouver

Retailer Sales Compliance Under Operation ID By Class of Trade (Weighted): Chain Convenience

Table A - 10	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	Likley That Change Is Statistically Significant (Yes/No)
NATIONAL	76.1	76.6	75.8	-0.8	NO
NATIONAL CORE 25	74.8	75.9	74.1	-1.8	NO
ST. JOHN'S	93.3	100.0	91.7	-8.3	YES
CHARLOTTETOWN	33.3	NA	50.0	NA	NA
NEW BRUNSWICK	100.0	100.0	100.0	0.0	NO
NEW BRUNSWICK CORE	100.0	100.0	100.0	0.0	NO
BATHURST	NA	NA	NA	NA	NA
FREDERICTON	100.0	NA	100.0	NA	NA
MONCTON	100.0	NA	100.0	NA	NA
SAINT JOHN	100.0	100.0	100.0	0.0	NO
NOVA SCOTIA	68.6	63.2	75.1	11.9	YES
HALIFAX	58.3	63.2	40.0	-23.2	YES
SYDNEY	90.9	NA	90.9	NA	NA
QUEBEC	56.2	58.1	55.7	-2.4	NO
CHIC/JONQUIERE	.	66.7	71.4	4.7	YES
MONTREAL	53.0	50.0	53.7	3.7	NO
QUEBEC CITY	65.4	60.0	66.7	6.7	NO
SHERBROOKE	93.8	93.8	NA	NA	NA
ONTARIO	86.4	79.7	92.1	12.4	YES
ONTARIO CORE	86.0	78.3	92.4	14.1	YES
KINGSTON	70.6	70.0	71.4	1.4	NO
OTTAWA	94.1	81.8	97.5	15.7	NO
ST. CATHARINES	88.4	86.5	90.6	4.1	NO
SUDBURY	77.8	66.7	83.3	16.6	YES
THUNDER BAY	100.0	NA	100.0	NA	NA
TORONTO	82.2	78.0	88.1	10.1	NO
WINDSOR	98.2	100.0	98.1	-1.9	YES
MANITOBA	61.6	64.5	57.9	-6.6	NO
BRANDON	75.0	66.7	100.0	33.3	YES
WINNIPEG	60.8	64.3	56.5	-7.8	NO
SASKATCHEWAN	97.6	96.5	100.0	3.5	YES
REGINA	100.0	100.0	100.0	0.0	NO
SASKATOON	95.8	95.2	100.0	4.8	YES
ALBERTA	88.6	84.1	94.1	10.0	YES
ALBERTA CORE	89.9	85.2	95.8	10.6	YES
CALGARY	98.8	98.1	100.0	1.9	NO
EDMONTON	80.8	69.2	92.3	23.1	YES
MEDICINE HAT	100.0	100.0	100.0	0.0	NO
RED DEER	60.0	50.0	66.7	16.7	NO
BRITISH COLUMBIA	76.8	79.6	73.6	-6.0	YES
KELOWNA	100.0	NA	100.0	NA	NA
CAMPBELL RIVER/COURTNAY	100.0	100.0	100.0	0.0	NO
VANCOUVER CMA	74.0	78.6	68.1	-10.5	YES
VANCOUVER 1	72.1	73.9	70.0	-3.9	NO
VANCOUVER 2	85.2	86.4	80.0	-6.4	YES
VANCOUVER 3	65.2	70.0	61.5	-8.5	NO
VANCOUVER 4	75.0	100.0	66.7	-33.3	NO

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

Retailer Sales Compliance Under Operation ID By Class of Trade (Weighted): Grocery Stores

Table A - 11	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	Likley That Change Is Statistically Significant (Yes/No)
NATIONAL	79.0	80.2	77.9	-2.3	NO
NATIONAL CORE 25	78.4	79.8	77.3	-2.5	NO
ST. JOHN'S	95.0	NA	95.0	NA	NA
CHARLOTTETOWN	81.8	83.3	80.0	-3.3	NO
NEW BRUNSWICK	82.1	90.0	77.8	-12.2	YES
NEW BRUNSWICK CORE	76.2	90.0	63.6	-26.4	YES
BATHURST	100.0	100.0	NA	NA	NA
FREDERICTON	83.3	NA	83.3	NA	NA
MONCTON	100.0	NA	100.0	NA	NA
SAINT JOHN	66.7	85.7	40.0	-45.7	YES
NOVA SCOTIA	86.4	77.1	92.5	15.4	YES
HALIFAX	72.7	66.7	80.0	13.3	NO
SYDNEY	100.0	100.0	100.0	0.0	NO
QUEBEC	66.5	64.6	67.4	2.8	NO
CHIC/JONQUIERE	76.5	80.0	75.0	-5.0	YES
MONTREAL	64.0	60.7	65.3	4.6	NO
QUEBEC CITY	68.1	56.0	75.0	19.0	YES
SHERBROOKE	92.9	92.9	NA	NA	NA
ONTARIO	88.1	84.1	93.2	9.1	YES
ONTARIO CORE	87.7	83.4	93.2	9.8	YES
KINGSTON	88.9	100.0	66.7	-33.3	YES
OTTAWA	100.0	100.0	100.0	0.0	NO
ST. CATHARINES	90.5	81.8	100.0	18.2	YES
SUDBURY	90.9	75.0	100.0	25.0	YES
THUNDER BAY	100.0	100.0	100.0	0.0	NO
TORONTO	84.6	82.4	88.9	6.5	NO
WINDSOR	100.0	100.0	100.0	0.0	NO
MANITOBA	76.9	81.9	72.2	-9.7	YES
BRANDON	100.0	100.0	100.0	0.0	NO
WINNIPEG	74.5	79.2	70.4	-8.8	YES
SASKATCHEWAN	91.8	91.3	100.0	8.7	YES
REGINA	100.0	100.0	100.0	0.0	NO
SASKATOON	85.0	85.0	NA	NA	NA
ALBERTA	91.6	95.5	88.3	-7.2	YES
ALBERTA CORE	92.4	95.4	89.7	-5.7	YES
CALGARY	97.8	100.0	96.2	-3.8	NO
EDMONTON	88.6	94.1	83.3	-10.8	YES
MEDICINE HAT	85.7	80.0	100.0	20.0	YES
RED DEER	75.0	100.0	66.7	-33.3	NO
BRITISH COLUMBIA	74.3	78.0	68.9	-9.1	YES
KELOWNA	100.0	NA	100.0	NA	NA
CAMPBELL RIVER/COURTNAY	100.0	100.0	100.0	0.0	NO
VANCOUVER CMA	69.0	75.6	56.8	-18.8	YES
VANCOUVER 1	67.6	75.0	58.8	-16.2	YES
VANCOUVER 2	71.4	78.3	58.3	-20.0	YES
VANCOUVER 3	75.0	76.7	70.0	-6.7	YES
VANCOUVER 4	50.0	66.7	20.0	-46.7	YES

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

Retailer Sales Compliance Under Operation ID By Class of Trade (Weighted): Gas Stations/Kiosks

Table A - 12	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	Likley That Change Is Statistically Significant (Yes/No)
NATIONAL	72.1	67.9	75.5	7.6	YES
NATIONAL CORE 25	71.1	66.7	74.8	8.1	YES
ST. JOHN'S	100.0	NA	100.0	NA	NA
CHARLOTTETOWN	81.0	85.7	78.6	-7.1	YES
NEW BRUNSWICK	76.5	68.2	79.2	11.0	YES
NEW BRUNSWICK CORE	69.2	68.2	69.7	1.5	NO
BATHURST	70.6	73.3	50.0	-23.3	NO
FREDERICTON	68.0	NA	68.0	NA	NA
MONCTON	94.4	NA	94.4	NA	NA
SAINT JOHN	69.0	50.0	73.9	23.9	YES
NOVA SCOTIA	60.8	61.0	60.7	-0.3	NO
HALIFAX	54.7	57.9	50.0	-7.9	NO
SYDNEY	75.8	71.4	78.9	7.5	NO
QUEBEC	56.9	46.1	63.3	17.2	YES
CHIC/JONQUIERE	88.6	90.9	87.5	-3.4	YES
MONTREAL	53.5	38.9	61.5	22.6	YES
QUEBEC CITY	60.0	50.0	64.6	14.6	NO
SHERBROOKE	76.7	76.7	NA	NA	NA
ONTARIO	76.9	71.3	82.2	10.9	YES
ONTARIO CORE	75.9	68.7	82.6	13.9	YES
KINGSTON	84.2	84.6	83.3	-1.3	NO
OTTAWA	93.5	87.5	95.7	8.2	NO
ST. CATHARINES	77.8	84.2	62.5	-21.7	YES
SUDBURY	61.8	66.7	59.1	-7.6	NO
THUNDER BAY	92.6	NA	92.6	NA	NA
TORONTO	71.0	66.7	76.7	10.0	NO
WINDSOR	97.7	100.0	97.6	-2.4	NO
MANITOBA	64.8	52.5	76.7	24.2	YES
BRANDON	89.5	84.6	100.0	15.4	YES
WINNIPEG	61.8	46.9	75.0	28.1	YES
SASKATCHEWAN	89.1	89.6	76.2	-13.4	NO
REGINA	93.0	92.9	100.0	7.1	YES
SASKATOON	85.3	86.2	66.7	-19.5	YES
ALBERTA	86.8	91.1	82.9	-8.2	YES
ALBERTA CORE	86.6	90.9	82.3	-8.6	YES
CALGARY	98.6	100.0	97.6	-2.4	NO
EDMONTON	75.0	83.3	64.7	-18.6	YES
MEDICINE HAT	79.2	92.9	60.0	-32.9	YES
RED DEER	90.9	100.0	88.9	-11.1	NO
BRITISH COLUMBIA	72.6	64.5	77.9	13.4	YES
KELOWNA	100.0	100.0	100.0	0.0	NO
CAMPBELL RIVER/COURTNAY	100.0	100.0	100.0	0.0	NO
VANCOUVER CMA	66.4	60.6	71.0	10.4	YES
VANCOUVER 1	59.6	55.6	61.8	6.2	NO
VANCOUVER 2	65.5	62.5	69.2	6.7	NO
VANCOUVER 3	70.0	54.2	80.6	26.4	YES
VANCOUVER 4	80.0	80.0	80.0	0.0	NO

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

Retailer Sales Compliance Under Operation ID By Class of Trade (Weighted): Independent Convenience Stores

Table A - 13	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	Likley That Change Is Statistically Significant (Yes/No)
NATIONAL	67.2	60.8	72.6	11.8	YES
NATIONAL CORE 25	66.3	60.6	71.3	10.7	YES
ST. JOHN'S	97.8	100.0	97.8	-2.2	YES
CHARLOTTETOWN	75.7	71.4	78.3	6.9	NO
NEW BRUNSWICK	82.5	56.7	91.9	35.2	YES
NEW BRUNSWICK CORE	74.3	56.7	85.7	29.0	YES
BATHURST	47.4	47.1	50.0	2.9	NO
FREDERICTON	95.1	100.0	95.0	-5.0	YES
MONCTON	100.0	NA	100.0	NA	NA
SAINT JOHN	75.4	68.2	79.5	11.3	YES
NOVA SCOTIA	62.2	60.7	64.2	3.5	NO
HALIFAX	51.7	53.7	48.1	-5.6	NO
SYDNEY	88.1	91.7	86.0	-5.7	YES
QUEBEC	55.5	47.7	60.1	12.4	YES
CHIC/JONQUIERE	79.0	86.2	75.0	-11.2	YES
MONTREAL	53.0	42.9	58.5	15.6	NO
QUEBEC CITY	54.5	39.1	63.6	24.5	YES
SHERBROOKE	88.9	90.2	75.0	-15.2	NO
ONTARIO	70.6	59.0	80.2	21.2	YES
ONTARIO CORE	69.5	58.4	79.2	20.8	YES
KINGSTON	96.8	93.7	100.0	6.3	NO
OTTAWA	100.0	100.0	100.0	0.0	NO
ST. CATHARINES	67.8	57.1	77.8	20.7	YES
SUDBURY	64.2	58.1	72.7	14.6	YES
THUNDER BAY	96.8	NA	96.8	NA	NA
TORONTO	63.5	55.6	72.0	16.4	NO
WINDSOR	97.8	75.0	100.0	25.0	NO
MANITOBA	61.2	67.1	55.2	-11.9	NO
BRANDON	70.0	75.0	66.7	-8.3	NO
WINNIPEG	60.6	66.7	54.3	-12.4	NO
SASKATCHEWAN	97.3	96.7	100.0	3.3	NO
REGINA	94.6	93.9	100.0	6.1	YES
SASKATOON	100.0	100.0	100.0	0.0	NO
ALBERTA	82.9	82.8	83.0	0.2	NO
ALBERTA CORE	83.3	83.1	83.4	0.3	NO
CALGARY	89.0	91.1	87.0	-4.1	NO
EDMONTON	75.5	72.4	79.2	6.8	NO
MEDICINE HAT	93.8	100.0	75.0	-25.0	NO
RED DEER	71.4	NA	76.9	NA	NA
BRITISH COLUMBIA	65.2	65.5	64.7	-0.8	NO
KELOWNA	100.0	NA	100.0	NA	NA
CAMPBELL RIVER/COURTNAY	92.9	85.7	100.0	14.3	YES
VANCOUVER CMA	62.4	65.0	57.2	-7.8	NO
VANCOUVER 1	58.7	62.8	50.0	-12.8	NO
VANCOUVER 2	63.3	68.6	56.0	-12.6	NO
VANCOUVER 3	66.7	60.5	77.3	16.8	NO
VANCOUVER 4	74.2	79.2	57.1	-22.1	YES

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

Retailer Sales Compliance Under Operation ID By Class of Trade (Weighted): Pharmacies

Table A - 14	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	Likley That Change Is Statistically Significant (Yes/No)
NATIONAL	83.4	82.1	84.5	2.4	NO
NATIONAL CORE 25	83.1	81.9	84.3	2.4	NO
ST. JOHN'S	100.0	100.0	100.0	0.0	NO
CHARLOTTETOWN	70.0	75.0	50.0	-25.0	YES
NEW BRUNSWICK	NA	NA	NA	NA	NA
NEW BRUNSWICK CORE	NA	NA	NA	NA	NA
BATHURST	NA	NA	NA	NA	NA
FREDERICTON	NA	NA	NA	NA	NA
MONCTON	NA	NA	NA	NA	NA
SAINT JOHN	NA	NA	NA	NA	NA
NOVA SCOTIA	NA	NA	NA	NA	NA
HALIFAX	NA	NA	NA	NA	NA
SYDNEY	NA	NA	NA	NA	NA
QUEBEC	NA	NA	NA	NA	NA
CHIC/JONQUIERE	NA	NA	NA	NA	NA
MONTREAL	NA	NA	NA	NA	NA
QUEBEC CITY	NA	NA	NA	NA	NA
SHERBROOKE	NA	NA	NA	NA	NA
ONTARIO	NA	NA	NA	NA	NA
ONTARIO CORE	NA	NA	NA	NA	NA
KINGSTON	NA	NA	NA	NA	NA
OTTAWA	NA	NA	NA	NA	NA
ST. CATHARINES	NA	NA	NA	NA	NA
SUDBURY	NA	NA	NA	NA	NA
THUNDER BAY	NA	NA	NA	NA	NA
TORONTO	NA	NA	NA	NA	NA
WINDSOR	NA	NA	NA	NA	NA
MANITOBA	72.5	70.4	75.3	4.9	NO
BRANDON	100.0	NA	100.0	NA	NA
WINNIPEG	70.5	70.4	70.6	0.2	NO
SASKATCHEWAN	94.3	97.7	79.9	-17.8	YES
REGINA	95.7	95.5	100.0	4.5	NO
SASKATOON	93.3	100.0	77.8	-22.2	YES
ALBERTA	90.9	94.5	88.6	-5.9	NO
ALBERTA CORE	90.5	94.3	88.2	-6.1	NO
CALGARY	98.1	100.0	97.0	-3.0	NO
EDMONTON	84.6	89.7	81.6	-8.1	NO
MEDICINE HAT	100.0	100.0	100.0	0.0	NO
RED DEER	100.0	100.0	100.0	0.0	NO
BRITISH COLUMBIA	72.3	68.2	76.8	8.6	NO
KELOWNA	100.0	NA	100.0	NA	NA
CAMPBELL RIVER/COURTNAY	100.0	100.0	100.0	0.0	NO
VANCOUVER CMA	69.3	67.4	71.8	4.4	NO
VANCOUVER 1	71.8	63.2	80.0	16.8	NO
VANCOUVER 2	46.4	62.5	25.0	-37.5	YES
VANCOUVER 3	83.9	78.3	100.0	21.7	YES
VANCOUVER 4	66.7	50.0	80.0	30.0	NO

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