

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

Final Report Findings: 2004

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

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This report has been prepared by The Corporate Research Group Ltd. (CRG) 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 based on site visits, data analysis and CRG's professional opinion. Findings are also based on projections using a study design first developed in 1995 by ACNielsen, a VNU company, and modified for successive studies in conjunction with legislative changes and changes to study specifications requested by Health Canada.

Acknowledgement

The Corporate Research Group Ltd. and Health Canada would like to thank the staff at ACNielsen for their cooperation with data and knowledge transfer.

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. This is the first year that The Corporate Research Group Ltd. (CRG) has conducted the independent measurements of retailer compliance with the sales-to-minors provisions of the laws for Health Canada. The studies conducted between 1995 - 2003 were completed by ACNielsen, a VNU company.

The scope and methodology of this work has evolved over the years but maintain direct links to the original study design developed by ACNielsen. In the effort to provide as much continuity as possible with the baseline measurements established in prior years by ACNielsen, CRG's approach to the study was to keep the field research and data reporting methods held as constant as possible with those of ACNielsen's studies held in the years 1997-2003.

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, gas stations/kiosks and pharmacies (only in provinces where the sale of tobacco in pharmacies is permitted).

A total of 5,516 stores were visited. Thirty cities across Canada form part of this study. The same cities have been consistently studied since 2002.

Compliance relating to tobacco advertising and the displaying of tobacco and tobacco related products was monitored in Saskatchewan based on Canada's Tobacco Act whereby this activity is not prohibited. This was measured, not in support of a provincial act or amendment, but due to a Saskatchewan Court of Appeal ruling (Rothmans, Benson & Hedges Inc. v. Saskatchewan, 2003 SKCA 93) which found Section 6 of Saskatchewan's Tobacco Control Act inconsistent with Section 30 of Canada's Tobacco Act. As a result of this decision, Federal laws relating to tobacco sales promotions became the observable default (doctrine of federal paramountcy).

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Observations relating to Operation ID are additions of the past three surveys, but all other measurements for this year's survey were collected and recorded in the same way as always.

Understanding This Report

The survey is not intended as a rating of cross-jurisdictional performance. The data from this study is intended strictly for information purposes and is not gathered for purposes of regulatory enforcement. As such, "compliance" is not measured on the basis of the strictest interpretations of the laws, but rather only to obtain a general estimate of retailers' abiding to their obligations under the various tobacco laws. The research is designed to monitor retailer compliance with the general *spirit* of the laws using specified conditions and guidelines 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 nine surveys since 1995;
- to learn from the national results what variables motivate retailer behaviour;
- to consider ways to apply these lessons in the provinces.

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KEY FINDINGS

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

For the first time in the history of this research the national retailer compliance levels regarding youth access to tobacco has exceeded the Federal Tobacco Control Strategy's (FTCS) 10-year target objective of 80% or greater: The current level stands at 82.3%.

Nationally, the percentage of retailers refusing to sell cigarettes to underage Canadians has improved from the dip experienced in the rates of just one year ago. The figure is weighted (i.e., raw data has been extrapolated to reflect conditions we might have found had all stores in the thirty cities been visited instead of just a sample of stores). Using the empirical rule, 95% of the elements have a parameter that falls within two standard deviations of the mean for that parameter in a normal distribution. Therefore, the results are accurate +/- 2 at the 95% confidence level. Meaning any result that is within +/- 2 points from last years results are statistically insignificant and statistically significant if the difference is outside of this range. On a national level, an increase of 14.6 percentage points from last year's compliance rating of 67.7% represents a statistical significance.

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

The increase in the percentage of retailers refusing to sell to underage youth correlates directly with an equivalent increase in the percentage of retailers willing to ask for proof of age. This year's result indicates a compliance of 80.1% when asking for ID, an increase of 13.3% over the 2003 results.

Retailers' willingness to sell to minors increases with the age of the minor. This study shows that a retailer's willingness to sell tobacco products increases by 10% for 17 year olds over 15 and 16 year olds combined. Compliance rates were highest amongst the "25+ *but not senior*" category age group of the clerk on the other side of the counter (86.1%). Retailers were more compliant when the gender of the minor was female and female clerks asked for ID and refused to sell more often than males.

Compliance levels in retailers near schools or malls increased this year (17.3%) and compliance levels from retailers elsewhere increased (12.2%). The differences in total compliance by proximity showed no statistical significance. The time of day of the visit showed a reverse from the last year. The trend was that retailers were more compliant before noon and became less and less compliant as the day progressed. Compliance

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rates dropped from 86.8% before noon to 76.6% after 6:00 PM. Consistent with last year's results, clerks were found less likely to show willingness to sell when adult customers were present in the store at the time of the minor's attempt to purchase cigarettes.

In 2004, the highest rate of compliance among the five classes of trade studied in this report belongs to pharmacies. Although the number of pharmacies selling tobacco products has reduced, those remaining have increased in compliancy levels. Among the trade classes, grocery supermarkets rank second and chain convenience stores rank third in compliance. Rates for gas and independent convenient stores have increased to compliance levels since last year's study. However, they also rank the lowest in compliance of all the trade classes.

First and foremost, it is important to recognize that this year's increase is regional in nature. The national compliance improvement stems primarily from an increase in the overall compliance rate across major cities in Quebec. All cities in Quebec showed an increase surpassing 20% from last year's levels, resulting in a score increase of 40% for all cities combined in that province. Ontario also showed an increase in compliance levels of 7.6%. The increase is likely due to an increased number of awareness programs initiated in that province since last year's study.

Among the encouraging details from the latest survey are these:

- twenty-three of thirty cities we visited reported compliance levels of seventy-five percent or better:

RED DEER	100.00%	CHICOUTIMI/ JONQUIERE	91.27%
MEDICINE HAT	98.44%	EDMONTON	89.61%
BATHURST	97.22%	MONCTON	86.84%
OTTAWA	95.79%	SHERBROOKE	86.79%
KELOWNA	95.65%	CAMPBELL RIVER/ COURTNAY	84.52%
KINGSTON	93.83%	THUNDER BAY	84.00%
SYDNEY	93.75%	ST. CATHARINES	81.50%
REGINA	92.97%	SUDBURY	80.00%
CHARLOTTETOWN	91.86%	QUEBEC CITY	77.98%
WINDSOR	91.82%	FREDERICTON	75.68%
VANCOUVER	91.80%	TORONTO	75.00%
CALGARY	91.67%		

- the list contains five cities that were not on last year's list of cities with highest compliance: Regina, Toronto, Chicoutimi/Jonquière, Sherbrooke and Quebec City;
- sales-to-minors compliance is at eighty percent or better (i.e., within the national target) in twenty of the thirty cities studied;

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- in 2004, compliance levels improved by a statistically significant amount (double digits) in ten cities:

Sherbrooke	+ 53.0 points
Montreal	+ 34.5 points
Quebec City	+ 28.3 points
Chicoutimi/Jonquière	+ 23.5 points
Regina	+ 20.0 points
Bathurst	+ 18.5 points
Charlottetown	+ 18.1 points
Vancouver Region 3*	+ 17.5 points
Vancouver Region 1*	+ 11.9 points
Sydney	+ 11.5 points

*Vancouver 1= Vancouver, Richmond

*Vancouver 3= Delta, Surrey, Langley, North Delta, White Rock

- Red Deer achieved a 100% compliance level for the second year in a row;
- gains in Charlottetown, Chicoutimi/Jonquière, Quebec City, St. Catharines, Kingston, Edmonton, Medicine Hat and Vancouver (CMA), propelled compliance levels to the highest recorded since the study began taking measurements in 1995;
- among twenty-two cities where stores were visited by fifteen year olds, only three cities scored below 80% with the lowest being Halifax with a compliance level of 45.2%. Five retailers scored between 80% and 90% and retailers in sixteen cities scored higher than 90%;
- among twenty-five cities where stores were visited by sixteen year olds, retailers in nine cities scored below 80%, retailers in three cities scored between 80% and 90% and thirteen cities scored greater than 90%;
- retailers in eleven cities scored below 80%, retailers in seven cities scored between 80% and 90% and retailers in seven cities scored higher than 90% out of a total of 27 cities in which seventeen year olds attempted to buy cigarettes;
- compliance levels reached a new high (91.1%) across the ever diminishing number of pharmacies where tobacco is still sold.

This year's survey shows that certain outside variables continue to influence tobacco retailer sales-to-minors behaviour. The age of teens attempting to make a purchase remains among the most significant of these. The data show that compliance drops progressively, by increments of approximately ten percentage points, among retailers dealing with fifteen, sixteen or seventeen year old customers (89.1% compliance for age 15; 79.1% compliance for age 17). The age and gender of the clerk staffing the tobacco counter also appears to affect the result in measurable ways. And, as always, there exists a strong correlation between the willingness of retailers to ask for proper proof of age and the likelihood that they will refuse a sale to underage youth when no ID is shown.

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In 2004, the percentage of retailers who asked for ID was the highest reported since 2000 and represents an increase over last year by 13.2%. Of the retailers who asked for ID, 96.9% were unwilling to sell when the minor claimed to not have ID on their person. When the minor wasn't even asked for ID, they were still refused a sale 23.5% of the time. This development is a contributing factor to this year's higher overall national rate of retailer compliance.

The findings were less conclusive concerning the influence of other variables on retailer tobacco sales behaviour. Among these are: store location near or away from schools or malls, the time of day stores were visited and the presence or not of other adults in the store at the time of the intended purchase. Compliance differences across these variables show no consistent trend and were either not significant nationally, or were at odds to the national result in a number of local markets¹.

Although retailers remain far more likely to refuse a sale to underage girls than to underage boys nationally, this result is not consistent at the level of individual cities. The national finding is skewed by the results in a relatively few number of larger and more populated communities. What is more accurate to say is that the gender of teens remains a variable of influence in some larger urban centers.

Of interest to stakeholders on both sides of the tobacco debate is the effect on retailer compliance of the industry-sponsored "Operation ID" program. This is the third year compliance measurements were taken along this dimension. We found fewer retailers this year than last participating in "Operation ID". Less than half (43.7%) of the 5,516 establishments visited for this year's survey indicated program participation compared with 45.2% the year before. The variance in participation rates at the regional level were largely dispersed amongst the thirty cities.

For the third consecutive year, retailers supporting "Operation ID" registered refusal rates that were significantly better at the national level than those posted by program non-participants (84.1% versus 71.1%, respectively). Statistically measurable differences in line with the national findings were also observed across all retail classes of trade, except pharmacies, where refusal rates were high regardless.

Regionally, compliance results are mixed and suggest that, while participation in "Operation ID" may have no detrimental effect on retailer compliance, neither is it a prerequisite for higher rates. Of the thirty cities we visited, we were able to draw comparisons between stores participating and those not participating in "Operation ID". Of the thirty cities, the difference in compliance recorded between participating and non-participating retailers was deemed large enough to be significant in sixteen cities (53% of the sample). Of these sixteen cities, participating retailers in only four of them (25%) were willing to sell more often than non-participating ones. In the other fourteen cities, the opposite was true. In short, significant positive differences attributable to participation in "Operation ID" are found in twelve of thirty cities (40%).

¹ Table 5, Chart 6 and Chart 7 respectively

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Table A – Weighted – Sales to Minors Compliance
Results by City/Province/Region - 2004

Region	% unwilling to sell (compliant)	% willing to sell (non-compliant)	% who asked for ID	% who asked for ID but did not sell	% who asked for ID and were willing to sell	% who did not ask for ID and were willing to sell
NATIONAL	82.3%	17.7%	80.1%	96.9%	3.1%	76.5%
NATIONAL (CORE)	81.9%	18.1%	80.4%	96.9%	3.1%	79.6%
ST. JOHNS	70.3%	29.7%	69.7%	98.5%	1.5%	94.9%
CHARLOTTETOWN	91.9%	8.1%	89.5%	98.7%	1.3%	66.7%
NEW BRUNSWICK	72.6%	27.4%	65.0%	92.8%	7.2%	64.9%
NEW BRUNSWICK CORE	67.2%	32.8%	64.7%	92.3%	7.7%	78.9%
BATHURST	97.2%	2.8%	97.2%	97.1%	2.9%	0.0%
FREDERICTON	75.7%	24.3%	62.2%	100.0%	0.0%	64.3%
MONCTON	86.8%	13.2%	65.8%	94.0%	6.0%	26.9%
SAINT JOHN	48.4%	51.6%	53.8%	81.6%	18.4%	90.5%
NOVA SCOTIA	79.3%	20.7%	81.9%	93.8%	6.2%	86.8%
HALIFAX	71.8%	28.2%	74.2%	91.8%	8.2%	85.9%
SYDNEY	93.8%	6.3%	96.9%	96.8%	3.2%	100.0%
QUEBEC	76.5%	23.5%	73.6%	97.6%	2.4%	82.4%
CHICOUTIMI/JONQUIERE	91.3%	8.7%	83.3%	100.0%	0.0%	52.4%
MONTREAL	67.0%	33.0%	64.8%	97.0%	3.0%	88.3%
QUEBEC CITY	78.0%	22.0%	74.6%	98.0%	2.0%	80.7%
SHERBROOKE	86.8%	13.2%	88.7%	95.7%	4.3%	83.3%
ONTARIO	83.9%	16.1%	80.8%	97.0%	3.0%	71.3%
ONTARIO CORE	83.7%	16.3%	81.5%	97.1%	2.9%	75.3%
KINGSTON	93.8%	6.2%	88.9%	97.2%	2.8%	33.3%
OTTAWA	95.8%	4.2%	96.3%	99.5%	0.5%	100.0%
ST. CATHARINES	81.5%	18.5%	74.4%	98.8%	1.2%	69.0%
SUDBURY	80.0%	20.0%	70.5%	93.2%	6.8%	51.6%
THUNDER BAY	84.0%	16.0%	85.3%	90.6%	9.4%	54.5%
TORONTO	75.0%	25.0%	75.2%	95.8%	4.2%	88.2%
WINDSOR	91.8%	8.2%	84.3%	98.5%	1.5%	44.0%
MANITOBA	64.5%	35.5%	62.4%	97.6%	2.4%	90.6%
BRANDON	66.7%	33.3%	64.1%	96.0%	4.0%	85.7%
WINNIPEG	64.2%	35.8%	62.2%	97.8%	2.2%	91.2%
SASKATCHEWAN	76.5%	23.5%	82.1%	91.1%	8.9%	90.7%
REGINA	93.0%	7.0%	93.8%	98.3%	1.7%	87.5%
SASKATOON	64.4%	35.6%	73.6%	84.4%	15.6%	91.3%
ALBERTA	91.8%	8.2%	85.8%	98.4%	1.6%	47.8%
ALBERTA CORE	91.3%	8.7%	86.1%	98.3%	1.7%	51.9%
CALGARY	91.7%	8.3%	87.4%	98.4%	1.6%	54.5%
EDMONTON	89.6%	10.4%	82.2%	98.2%	1.8%	50.0%
MEDICINE HAT	98.4%	1.6%	100.0%	98.4%	1.6%	0.0%
RED DEER	100.0%	0.0%	79.5%	100.0%	0.0%	0.0%
BRITISH COLUMBIA	91.5%	8.5%	91.3%	97.9%	2.1%	75.9%
KELOWNA	95.7%	4.3%	94.6%	98.9%	1.1%	60.0%
CAMPBELL RIVER/COURTNAY	84.5%	15.5%	91.7%	92.2%	7.8%	100.0%
VANCOUVER CMA	91.8%	8.2%	90.9%	98.4%	1.6%	74.6%
VANCOUVER 1	93.3%	6.7%	93.8%	99.1%	0.9%	93.3%
VANCOUVER 2	93.5%	6.5%	91.2%	98.5%	1.5%	57.9%
VANCOUVER 3	98.6%	1.4%	95.9%	99.5%	0.5%	22.2%
VANCOUVER 4	70.2%	29.8%	73.1%	93.4%	6.6%	92.9%

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

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

REGION	1995 Results	1996 Results	1997 Results	1998 Results	1999 Results	2000 Results	2002 Results	2003 Results	2004 Results
NATIONAL	NA	NA	NA	NA	NA	NA	71.2%	67.7%	82.3%
NATIONAL (CORE)	47.9%	60.5%	67.3%	61.0%	69.7%	69.8%	70.3%	66.7%	81.9%
ST. JOHNS	33.2%	58.4%	83.4%	79.6%	52.4%	87.8%	98.2%	67.2%	70.3%
CHARLOTTETOWN	90.4%	34.3%	72.9%	77.9%	86.0%	86.0%	75.6%	74.8%	91.9%
NEW BRUNSWICK	NA	NA	NA	NA	NA	NA	81.6%	78.7%	72.6%
NEW BRUNSWICK CORE	88.8%	84.8%	58.0%	40.7%	42.1%	72.7%	73.1%	76.6%	67.2%
BATHURST	8.3%	38.7%	60.0%	22.6%	60.3%	95.4%	59.1%	78.7%	97.2%
FREDERICTON	99.9%	89.5%	49.3%	39.8%	30.2%	79.9%	84.9%	86.3%	75.7%
MONCTON	NA	NA	NA	NA	NA	NA	98.5%	82.8%	86.8%
SAINT JOHN	94.2%	87.6%	61.5%	42.7%	45.9%	67.1%	73.1%	70.2%	48.4%
NOVA SCOTIA	75.5%	89.8%	64.1%	69.3%	73.3%	70.9%	63.8%	89.7%	79.3%
HALIFAX	NA	NA	57.4%	62.2%	84.5%	76.8%	54.1%	92.8%	71.8%
SYDNEY	96.8%	98.1%	80.5%	86.5%	45.3%	52.2%	86.1%	82.3%	93.8%
QUEBEC	23.9%	28.8%	45.4%	48.7%	65.2%	47.0%	57.0%	36.6%	76.5%
CHICOUTIMI/JONQUIERE	16.0%	14.3%	49.0%	47.9%	72.2%	64.5%	80.4%	67.8%	91.3%
MONTREAL	27.7%	27.9%	45.4%	62.0%	69.3%	63.2%	54.2%	32.5%	67.0%
QUEBEC CITY	9.1%	33.8%	44.8%	25.1%	57.3%	18.5%	58.4%	49.7%	78.0%
SHERBROOKE	32.7%	45.9%	45.0%	47.5%	69.4%	41.1%	87.1%	33.8%	86.8%
ONTARIO	NA	NA	NA	NA	NA	NA	74.8%	76.3%	83.9%
ONTARIO CORE	62.2%	73.3%	69.4%	62.0%	79.1%	83.7%	73.6%	75.3%	83.7%
KINGSTON	NA	NA	NA	NA	NA	NA	88.7%	90.1%	93.8%
OTTAWA	40.1%	46.5%	72.1%	55.5%	84.3%	68.6%	97.6%	90.5%	95.8%
ST. CATHARINES	NA	NA	NA	NA	NA	NA	77.1%	80.4%	81.5%
SUDBURY	74.2%	61.1%	80.2%	79.7%	84.1%	59.6%	66.7%	82.4%	80.0%
THUNDER BAY	NA	NA	NA	NA	NA	NA	96.2%	87.6%	84.0%
TORONTO	68.6%	77.3%	67.9%	62.4%	78.5%	87.5%	67.8%	70.3%	75.0%
WINDSOR	63.1%	93.2%	86.5%	63.0%	73.0%	60.0%	97.9%	100.0%	91.8%
MANITOBA	56.5%	76.8%	72.1%	67.7%	83.7%	78.9%	65.2%	90.5%	64.5%
BRANDON	61.0%	69.3%	47.2%	79.8%	92.6%	84.5%	84.9%	73.9%	66.7%
WINNIPEG	56.4%	76.9%	72.3%	67.5%	83.6%	78.8%	63.6%	91.8%	64.2%
SASKATCHEWAN	30.1%	77.8%	66.9%	73.8%	78.9%	81.4%	93.4%	81.7%	76.5%
REGINA	NA	NA	58.6%	72.5%	70.7%	80.1%	95.2%	73.0%	93.0%
SASKATOON	NA	NA	74.6%	75.2%	85.9%	82.6%	91.9%	89.0%	64.4%
ALBERTA	NA	NA	NA	NA	NA	NA	87.0%	83.2%	91.8%
ALBERTA CORE	60.1%	68.6%	80.3%	75.4%	73.6%	67.3%	87.3%	82.3%	91.3%
CALGARY	42.1%	55.9%	82.6%	82.6%	63.2%	63.0%	95.0%	82.4%	91.7%
EDMONTON	75.4%	78.7%	78.1%	68.2%	85.4%	71.7%	79.6%	81.0%	89.6%
MEDICINE HAT	95.6%	93.4%	69.4%	62.5%	6.6%	95.6%	89.9%	95.4%	98.4%
RED DEER	NA	NA	NA	NA	NA	NA	81.3%	100.0%	100.0%
BRITISH COLUMBIA	69.2%	74.0%	77.7%	60.3%	59.3%	75.3%	69.3%	84.2%	91.5%
KELOWNA	53.2%	53.6%	82.9%	87.6%	98.2%	63.8%	100.0%	93.3%	95.7%
CAMPBELL RIVER/COURTNAY	100.0%	100.0%	94.5%	86.8%	98.2%	85.1%	97.6%	89.8%	84.5%
VANCOUVER CMA	69.1%	74.0%	77.5%	59.6%	58.2%	75.4%	65.5%	83.2%	91.8%
VANCOUVER 1	NA	NA	NA	NA	NA	NA	62.2%	81.4%	93.3%
VANCOUVER 2	NA	NA	NA	NA	NA	NA	63.8%	89.3%	93.5%
VANCOUVER 3	NA	NA	NA	NA	NA	NA	71.3%	81.1%	98.6%
VANCOUVER 4	NA	NA	NA	NA	NA	NA	72.3%	81.4%	70.2%

NA = Not applicable to that study period - year or city.

*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, Pitt Meadows, New Westminster

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

Vancouver 4: North Vancouver, West Vancouver

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Table C – Weighted – Sales to Minors Compliance Results by City/Province/Region Based on Retailer Participation in Operation ID – 2004

	All Stores	Compliant Stores that do not Participate in "Operation ID"	Stores that Participate in "Operation ID" and are Compliant	Compliance Point Difference	Likely That Change is Statistically Significant (Yes/No)
NATIONAL	82.3%	80.8%	84.1%	3.3%	No
NATIONAL (CORE)	81.9%	80.5%	83.6%	3.1%	No
ST. JOHNS	70.3%	76.3%	67.6%	-8.6%	Yes
CHARLOTTETOWN	91.9%	81.3%	94.3%	13.0%	Yes
NEW BRUNSWICK	72.6%	87.4%	65.8%	-21.6%	Yes
NEW BRUNSWICK CORE	67.2%	86.3%	60.7%	-25.6%	Yes
BATHURST	97.2%	95.7%	100.0%	4.3%	No
FREDERICTON	75.7%	87.0%	70.6%	-16.4%	Yes
MONCTON	86.8%	88.9%	85.0%	-3.9%	No
SAINT JOHN	48.4%	40.0%	48.8%	8.8%	Yes
NOVA SCOTIA	79.3%	68.9%	87.3%	18.4%	Yes
HALIFAX	71.8%	68.9%	77.4%	8.5%	Yes
SYDNEY	93.8%	N/A	93.8%	N/A	N/A
QUEBEC	76.5%	72.1%	83.7%	11.6%	Yes
CHICOUTIMI/JONQUIERE	91.3%	86.4%	92.3%	5.9%	Yes
MONTREAL	67.0%	66.0%	70.9%	4.9%	No
QUEBEC CITY	78.0%	74.5%	83.0%	8.5%	Yes
SHERBROOKE	86.8%	85.1%	90.6%	5.5%	Yes
ONTARIO	83.9%	82.4%	86.1%	3.7%	No
ONTARIO CORE	83.6%	82.9%	84.7%	1.9%	No
KINGSTON	93.8%	95.1%	92.5%	-2.6%	No
OTTAWA	95.8%	93.0%	100.0%	7.0%	Yes
ST. CATHARINES	81.5%	77.4%	92.1%	14.6%	Yes
SUDBURY	80.0%	80.7%	77.3%	-3.5%	No
THUNDER BAY	84.0%	84.6%	83.9%	-0.7%	No
TORONTO	75.0%	76.2%	72.8%	-3.4%	No
WINDSOR	91.8%	91.5%	92.0%	0.5%	No
MANITOBA	64.5%	62.3%	67.9%	5.7%	Yes
BRANDON	66.7%	66.7%	66.7%	0.0%	No
WINNIPEG	64.2%	61.7%	68.1%	6.4%	Yes
SASKATCHEWAN	76.5%	73.5%	85.5%	12.1%	Yes
REGINA	93.0%	93.8%	86.7%	-7.1%	Yes
SASKATOON	64.4%	53.1%	85.2%	32.1%	Yes
ALBERTA	91.8%	92.1%	91.5%	-0.6%	No
ALBERTA CORE	91.3%	91.6%	90.9%	-0.7%	No
CALGARY	91.7%	89.6%	94.9%	5.3%	Yes
EDMONTON	89.6%	93.7%	83.3%	-10.3%	Yes
MEDICINE HAT	98.4%	100.0%	98.4%	-1.6%	No
RED DEER	100.0%	100.0%	100.0%	0.0%	No
BRITISH COLUMBIA	91.5%	91.1%	92.1%	0.9%	No
KELOWNA	95.7%	97.3%	94.5%	-2.8%	No
CAMPBELL RIVER/COURTNAY	84.5%	77.4%	96.8%	19.4%	Yes
VANCOUVER CMA	91.8%	92.2%	91.1%	-1.1%	No
VANCOUVER 1	93.3%	93.4%	93.2%	-0.3%	No
VANCOUVER 2	93.5%	93.4%	93.7%	0.2%	No
VANCOUVER 3	98.6%	99.1%	98.1%	-1.0%	No
VANCOUVER 4	70.2%	70.9%	69.4%	-1.5%	No

N/A = Not Applicable to that study period - year or city

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

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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 56.5%. This figure represents the weighted percentage of retailers across all thirty cities visited that met every sign compliance condition we measured.

The current level is the highest it has been since the start of national measurements in 1995. The historical trend reveals an upward move in the compliance levels with a slight levelling off in 1997 and 2002.

Higher sign compliance rates nationally stem from increases in thirteen of thirty cities visited. The largest and most significant increases (i.e., double-digit increases) are from seven cities, where the straight average of the jump is 33.7 points. These cities are:

- Sydney (+51.8 points)
- Saint John (+ 48.2 points)
- Toronto (+ 42.0 points)
- Thunder Bay (+ 27.7 points)
- Brandon (+ 27.5 points)
- Saskatoon (+22.6 points)
- Halifax (+ 16.3 points)

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

There are seventeen of thirty cities where retailer compliance with the posting provisions of the tobacco laws deteriorated over levels in 2003. The straight average of the decrease across all seventeen cities is 38.2 points, but the largest drop occurred in fourteen of the cities (double digits). These cities are:

- Medicine Hat (-91.8 points)
- Kingston (-81.7 points)
- Red Deer (-64.6 points)
- Ottawa (-62.4 points)
- Charlottetown (-47.2 points)
- St. John's (-46.2 points)
- Moncton (-43.1 points)
- Bathurst (-43.0 points)
- Chicoutimi/Jonquière (-40.0%)
- Campbell River/Courtnay (-35.2 points)
- Sudbury (-20.8 points)
- Kelowna (-20.5 points)
- Vancouver (-17.8 points)
- Sherbrooke (-11.9 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 five cities where

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the percentage of stores in full compliance was eighty or better. Lowest compliance was in fifteen cities where the percentage of stores in full compliance was below the national average (i.e., less than 56.5%).

Table D – Weighted – Sign Compliance
Cities Reporting Highest and Lowest Retailer Compliance 2004

Cities Reporting Highest Sign Compliance (70% or Better)		Cities Reporting Lowest Sign Compliance (Below National Average 56.5%)	
SYDNEY	93.0%	WINDSOR	55.3%
BRANDON	87.2%	REGINA	54.7%
SAINT JOHN	83.5%	CHARLOTTETOWN	51.2%
THUNDER BAY	81.3%	MONCTON	48.7%
ST. CATHARINES	80.2%	CAMPBELL RIVER/COURTNAY	45.2%
FREDERICTON	79.7%	TORONTO	43.9%
EDMONTON	78.0%	HALIFAX	42.7%
CALGARY	75.0%	MONTREAL	42.0%
KELOWNA	72.8%	SUDBURY	32.4%
		RED DEER	31.8%
		BATHURST	30.6%
		ST. JOHNS	25.6%
		CHICOUTIMI/JONQUIERE	23.0%
		OTTAWA	18.7%
		KINGSTON	12.3%
		MEDICINE HAT	3.1%

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

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Table E – Weighted – Retailer Compliance with Mandatory Sign Provisions - 2004

How To Interpret This Table

The figures in the column labelled *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. The figures in the other columns show the percentage of retailers properly posting the sign indicated at the top of the column. "N/A" indicates that the sign indicated does not apply to the respective region.

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	% Stores with signs in both languages	Full Compliance	Sign saying "You may smoke here"
NATIONAL	63.2%	7.0%	18.7%	42.7%	15.6%	4.2%	5.5%	27.6%	56.5%	0.3%
NATIONAL (CORE)	61.5%	7.7%	19.1%	39.3%	10.6%	3.4%	6.1%	27.5%	56.1%	0.1%
ST. JOHNS	25.8%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	25.6%	N/A
CHARLOTTETOWN	62.8%	73.3%	N/A	84.9%	N/A	N/A	N/A	N/A	51.2%	N/A
NEW BRUNSWICK	83.8%	N/A	97.1%	80.1%	N/A	84.1%	N/A	56.3%	66.1%	N/A
NEW BRUNSWICK Core	88.6%	N/A	97.0%	85.6%	N/A	85.6%	N/A	45.3%	72.6%	N/A
BATHURST	63.9%	N/A	94.4%	72.2%	N/A	52.8%	N/A	25.0%	30.6%	N/A
FREDERICTON	87.8%	N/A	97.3%	83.8%	N/A	91.9%	N/A	91.9%	79.7%	N/A
MONCTON	71.1%	N/A	97.4%	65.8%	N/A	80.3%	N/A	85.5%	48.7%	N/A
SAINT JOHN	98.9%	N/A	97.8%	92.3%	N/A	93.4%	N/A	15.4%	83.5%	N/A
NOVA SCOTIA	0.0%	85.6%	N/A	N/A	N/A	N/A	81.1%	N/A	59.8%	N/A
HALIFAX	0.0%	78.2%	N/A	N/A	N/A	N/A	72.2%	N/A	42.7%	N/A
SYDNEY	0.0%	100.0%	N/A	N/A	N/A	N/A	98.4%	N/A	93.0%	N/A
QUEBEC	49.8%	N/A	N/A	N/A	N/A	N/A	N/A	43.6%	49.9%	N/A
CHICOUTIMI/JONQUIERE	24.6%	N/A	N/A	N/A	N/A	N/A	N/A	31.7%	23.0%	N/A
MONTREAL	39.3%	N/A	N/A	N/A	N/A	N/A	N/A	31.9%	42.0%	N/A
QUEBEC CITY	67.0%	N/A	N/A	N/A	N/A	N/A	N/A	53.2%	63.3%	N/A
SHERBROOKE	63.2%	N/A	N/A	N/A	N/A	N/A	N/A	67.9%	67.9%	N/A
ONTARIO	82.1%	N/A	N/A	84.1%	67.4%	N/A	N/A	8.2%	46.8%	1.3%
ONTARIO CORE	80.1%	N/A	N/A	82.6%	59.9%	N/A	N/A	5.2%	38.5%	0.6%
KINGSTON	86.4%	N/A	N/A	84.0%	58.0%	N/A	N/A	N/A	12.3%	N/A
OTTAWA	77.1%	N/A	N/A	93.9%	54.2%	N/A	N/A	14.5%	18.7%	N/A
ST. CATHARINES	85.0%	N/A	N/A	87.7%	90.7%	N/A	N/A	11.5%	80.2%	4.4%
SUDBURY	77.1%	N/A	N/A	75.2%	56.2%	N/A	N/A	6.7%	32.4%	N/A
THUNDER BAY	92.0%	N/A	N/A	92.0%	96.0%	N/A	N/A	44.0%	81.3%	1.3%
TORONTO	80.6%	N/A	N/A	81.1%	59.2%	N/A	N/A	1.5%	43.9%	0.7%
WINDSOR	84.9%	N/A	N/A	76.1%	71.7%	N/A	N/A	1.3%	55.3%	1.3%
MANITOBA	78.1%	N/A	N/A	N/A	N/A	N/A	N/A	75.4%	71.0%	N/A
BRANDON	89.7%	N/A	N/A	N/A	N/A	N/A	N/A	97.4%	87.2%	N/A
WINNIPEG	76.6%	N/A	N/A	N/A	N/A	N/A	N/A	72.6%	68.9%	N/A
SASKATCHEWAN	71.9%	N/A	N/A	67.2%	N/A	N/A	N/A	N/A	62.6%	N/A
REGINA	59.4%	N/A	N/A	28.9%	N/A	N/A	N/A	N/A	54.7%	N/A
SASKATOON	81.0%	N/A	N/A	95.4%	N/A	N/A	N/A	N/A	68.4%	N/A
ALBERTA	78.3%	N/A	N/A	N/A	N/A	N/A	N/A	76.2%	68.1%	N/A
ALBERTA CORE	80.9%	N/A	N/A	N/A	N/A	N/A	N/A	77.8%	70.2%	N/A
CALGARY	79.6%	N/A	N/A	N/A	N/A	N/A	N/A	78.7%	75.0%	N/A
EDMONTON	78.9%	N/A	N/A	N/A	N/A	N/A	N/A	91.1%	78.0%	N/A
MEDICINE HAT	98.4%	N/A	N/A	N/A	N/A	N/A	N/A	3.1%	3.1%	N/A
RED DEER	34.1%	N/A	N/A	N/A	N/A	N/A	N/A	47.7%	31.8%	N/A
BRITISH COLUMBIA	79.5%	N/A	80.2%	82.5%	N/A	N/A	N/A	N/A	61.7%	N/A
KELOWNA	89.1%	N/A	78.3%	89.1%	N/A	N/A	N/A	N/A	72.8%	N/A
CAMPBELL RIVER/COURTNEY	52.4%	N/A	67.9%	90.5%	N/A	N/A	N/A	N/A	45.2%	N/A
VANCOUVER CMA	81.3%	N/A	81.7%	80.8%	N/A	N/A	N/A	N/A	62.2%	N/A
VANCOUVER 1	84.2%	N/A	79.6%	82.1%	N/A	N/A	N/A	N/A	62.9%	N/A
VANCOUVER 2	85.1%	N/A	86.5%	88.4%	N/A	N/A	N/A	N/A	69.8%	N/A
VANCOUVER 3	79.4%	N/A	80.7%	74.8%	N/A	N/A	N/A	N/A	55.5%	N/A
VANCOUVER 4	71.2%	N/A	78.8%	75.0%	N/A	N/A	N/A	N/A	58.7%	N/A

N/A indicates that the sign is not applicable to the respective region.

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

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

In a manner consistent with past surveys, CRG this year collected information on tobacco point-of-sale (POS) advertising permitted under the *Tobacco Act*.

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.

Nationally we found in-store tobacco-related advertising elements in more than forty percent (44.3%) of stores. This is a weighted figure and is an estimate of conditions we

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likely would have found had all stores in the universe been visited, not just a sample of stores. This distribution figure represents the second increase in the past four surveys and is showing the highest ever recorded average to date. Coupled with an increase in the average number of ads found in those stores with ads, the indication is that tobacco manufacturers increased point-of-purchase support behind their brands in 2004.

The cities where tobacco ad distribution increased the most are listed in Table 21. In the majority of these cities, distribution jumped by more than fifty percent this year.

Counter-top displays continue to be the most widely distributed tobacco brand advertising medium. These were found in a quarter of stores nationally (24.2%), down slightly from 2003 levels. The form of advertisements, danglers, shelf-talkers and posters has increased in the last year, making for a more varied mix of forms of advertisement across the nation.

The weakest locations where tobacco ad distribution was found this year was Kelowna, Charlottetown and Medicine Hat.

Small surface retail stores (chain and independent convenience and gas stations) remain more likely than larger surface stores to carry tobacco POS merchandising materials. Almost two thirds (64.7%) of convenience chains nationally carried POS advertising, followed by independent convenience stores (50.6%) and gas stations/kiosks (50%).

Nationally, the percentage of stores carrying tobacco ads has risen across all store types, except pharmacies. Numerically, fewer pharmacies than ever are selling tobacco.

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 42.2% in stores closest to schools/malls and 46.3% in stores further away.

Among stores with ads, the average number of tobacco POS ad pieces carried was 2.6 pieces per store, up from 2.4 pieces a year ago.

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 2003:

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Table F – Weighted – All Stores
Changes in POS* Ad Distribution Across Regions – 2004 vs. 2003 Results
% of Stores with Ads (Cities with 0.0% indicate no ad distribution)

Cities Where Tobacco Ad Distribution Is Highest	2003	2004	Diff 2004 vs 2003
SYDNEY	46.0%	84.4%	38.4%
OTTAWA	52.3%	73.4%	21.1%
MONCTON	0.0%	71.1%	71.1%
SHERBROOKE	64.7%	69.8%	5.1%
HALIFAX	1.5%	66.9%	65.4%
CHICOUTIMI/JONQUIERE	24.1%	66.7%	42.6%
FREDERICTON	50.4%	66.2%	15.8%
Cities Where Tobacco Ad Distribution Is Lowest	2003	2004	Diff 2003 vs 2002
KELOWNA	0.0%	1.1%	1.1%
CHARLOTTETOWN	1.2%	4.7%	3.5%
MEDICINE HAT	58.4%	9.4%	-49.0%
QUEBEC CITY	66.0%	11.6%	-54.4%
WINDSOR	50.2%	17.0%	-33.2%
CAMPBELL RIVER/ COURTNEY	40.1%	17.9%	-22.2%
VANCOUVER 1	34.3%	21.3%	-13.0%

*Point-of-Sale

Point of Sale

CRG 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 a third of these stores. The brand with the greatest distribution was *du Maurier*, with ads available in 44.5% of chain convenience stores, 26.3% of independent convenience stores and 29.7% of gas stations;
- distribution for all "Other" brands (not separately specified) was actually second highest than that for any other single brand across each of these classes of retail trade;
- the share of ads enjoyed by tobacco brands across cities and trade classes coincided closely with the percent of stores carrying each brand;

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- within each store type, stores with ads now carried more than two ads, on average, per store. In each trade class the average number of ads carried is higher in 2004 than in 2003. Chain convenience stores with ads carried the largest number of ads (2.6 ads on average). Gas station and independent convenience stores with ads each carried a little less than two ads per store (1.9 and 1.8 ads on average, respectively);
- counter-top displays, which used to be the predominant advertising vehicle in all three channels of trade has now dropped significantly and the shelf-talker is now being widely used. These two forms of ads accounted for over seventy-five percent of all ads in chain convenience stores (76.7%), more than two-thirds of ads in gas stores (68.2%) and 65.6% of ads in independent convenience stores. In all stores, counter-top displays were the leading ad vehicle for the most advertised brands, but the use of danglers, shelf-talkers and "other" ad forms (not specified) was more pronounced than in the recent past.

Introduction

Preface

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

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

Individual provinces have in place their own regulations prohibiting the sale of tobacco products to minors. These may stipulate rules for the display of tobacco products differently from the federal minimum, may require sign-posting requirements different from the federal provision, and may restrict the sale of tobacco products to minors older than 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 several years ago. Observers in these three provinces were instructed to monitor retailer compliance

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consistent with the age and sign provisions of the federal *Tobacco Act*. Any additional signs were noted, if found.

In March 2002, Saskatchewan's *Tobacco Control Act* took effect and removed retail displays from stores. The law required vendors to use curtains and cabinets to hide cigarettes, cigars and chewing tobacco behind the counter, or ban minors from their stores.

The retail display ban regulations withstood a constitutional legal challenge. In October 2002, the Saskatchewan Court upheld the law, finding that the province was within its rights to protect the health of young people and that the law was consistent with the federal *Tobacco Act*. It was appealed shortly after.

On October 3, 2003, the Saskatchewan Court of Appeal struck down the provision in the Saskatchewan Tobacco Control Act prohibiting the visible display of tobacco products in any premise where minors have access, and the provision of the Act banning signs in such stores from being visible to the public. The Court said that the provisions in the Saskatchewan Act were in conflict with the federal *Tobacco Act* (which did not prohibit such displays and signage) and thus invalid.

At the time the decision was rendered, the federal government, together with the Saskatchewan government, was in court to argue that the Saskatchewan law was valid and not in conflict with the federal Act.

Saskatchewan promptly applied to the Supreme Court of Canada for permission to appeal the judgment. On March 25, 2004, the Supreme Court of Canada granted this request. The case is tentatively scheduled to begin January 18, 2005. This year's study makes the necessary adjustments to reflect the changes in the Saskatchewan legislation.

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

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to-youth laws to 80%. The FTCS specifies the on-going annual evaluation of retailer compliance as one of five strategic objectives for the coming years. The findings from the current study build on the results of annual retailer behaviour measurements since 1995, at the same time establishing new benchmarks against which future progress can be measured and compared.

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

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

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3. Operation ID Displays

- the number and percentage of establishments displaying *Operation ID* POS material of any sort.

Methodology

Teams made up of two Corporate Research Group observers, one a minor (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 5,516 retail establishments in thirty cities and towns across Canada. Stores were visited over thirteen weeks from July 5th, 2004 to October 4th, 2004.

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 or 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

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year where the number of sample stores was too small to accommodate a full mix of boys and girls across each age group. In these cases, the sample was assigned to one or more teens of pre-determined age and gender. The distributions were similar to the criteria used in the last study of this type, in 2003.

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	2003	2004
Sample Size (# Stores Visits)	5,023	5,023	5,024	5,550	5,452	5,516
Male	50.7%	49.8%	49.6%	49.4%	49.6%	49.7%
Female	49.3%	50.2%	50.4%	50.6%	50.4%	50.3%
15 Year Olds	23.4%	23.4%	23.6%	23.7%	23.8%	24.7%
16 year Olds	28.8%	28.7%	29.0%	29.3%	29.4%	24.4%
17 year Olds	47.8%	47.9%	47.4%	46.9%	46.8%	50.9%

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 in 2002 and retained for 2003 and 2004. These are: Moncton, Kingston, St. Catharines, Thunder Bay and Red Deer.

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

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

In all cities for 2004, our sampling objective was to match sample distributions by city and class of trade as closely as possible to those established in the ACNielsen study of 2003. Samples were drawn to ensure representation of the census metropolitan area (CMA) of the largest cities. For Vancouver, it was requested that statistically reliable measures be provided for the entire CMA and separately for each of four different health territories. This required the area to be over-sampled. The four health regions within the greater Vancouver area were defined by the boundaries of communities as follows:

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

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

In the end, we completed visits to 5,516 stores, geographically dispersed largely in a manner consistent with our pre-established targets. Table *ii*, at the end of this section, shows the actual number of completes across the nation.

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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 nine surveys since 1995;
- to learn from the national results what variables motivate retailer behaviour;
- to consider ways to apply these lessons in the provinces.

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Table ii – Tobacco Compliance Sample – 2004

	All Store Classes	Chain Convenience	Gas Stores/Kiosks	Grocery	Ind't Convenience	Pharmacies	Final Sample 2004
NATIONAL	5,516	1002	1496	839	1,786	393	5,516
ST. JOHNS	195	17	44	24	90	20	195
CHARLOTTETOWN	86	11	25	9	31	10	86
NEW BRUNSWICK	277	29	71	20	157	N/A	277
BATHURST	36	N/A	13	3	20	N/A	36
FREDERICTON	74	7	19	5	43	N/A	74
MONCTON	76	13	24	5	34	N/A	76
SAINT JOHN	91	9	15	7	60	N/A	91
NOVA SCOTIA	376	42	103	22	209	N/A	376
HALIFAX	248	30	65	11	142	N/A	248
SYDNEY	128	12	38	11	67	N/A	128
QUEBEC	923	184	233	189	317	N/A	923
CHICOUTIMI/JONQUIERE	126	12	31	17	66	N/A	126
MONTREAL	364	98	94	89	83	N/A	364
QUEBEC CITY	327	56	78	69	124	N/A	327
SHERBROOKE	106	18	30	14	44	N/A	106
ONTARIO	1,273	323	350	207	393	N/A	1,273
KINGSTON	81	18	21	9	33	N/A	81
OTTAWA	214	51	65	45	53	N/A	214
ST. CATHARINES	227	72	54	20	81	N/A	227
SUDBURY	105	15	35	16	39	N/A	105
THUNDER BAY	75	15	27	4	29	N/A	75
TORONTO	412	102	102	103	105	N/A	412
WINDSOR	159	51	45	10	53	N/A	159
MANITOBA	338	61	91	59	81	46	338
BRANDON	39	4	17	7	9	2	39
WINNIPEG	299	57	74	52	72	44	299
SASKATCHEWAN	302	44	116	34	55	53	302
REGINA	128	20	51	15	25	17	128
SASKATOON	174	24	65	19	30	36	174
ALBERTA	793	186	182	128	148	149	793
CALGARY	348	90	77	48	69	64	348
EDMONTON	337	85	70	68	48	66	337
MEDICINE HAT	64	5	24	7	18	10	64
RED DEER	44	6	11	5	13	9	44
BRITISH COLUMBIA	953	105	281	147	305	115	953
KELOWNA	92	8	43	16	16	9	92
CAMPBELL RIVER/COURTNAY	84	8	24	12	31	9	84
VANCOUVER CMA	777	89	214	119	258	97	777
VANCOUVER 1	240	36	50	39	82	33	240
VANCOUVER 2	215	26	70	32	65	22	215
VANCOUVER 3	218	22	66	36	63	31	218
VANCOUVER 4	104	5	28	12	48	11	104

N/A indicates that the class of trade is not represented within the respective region.

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

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Part A Tobacco Sales-to-Minors Legislation

SECTION 1.0 - Tobacco Sales to Minors

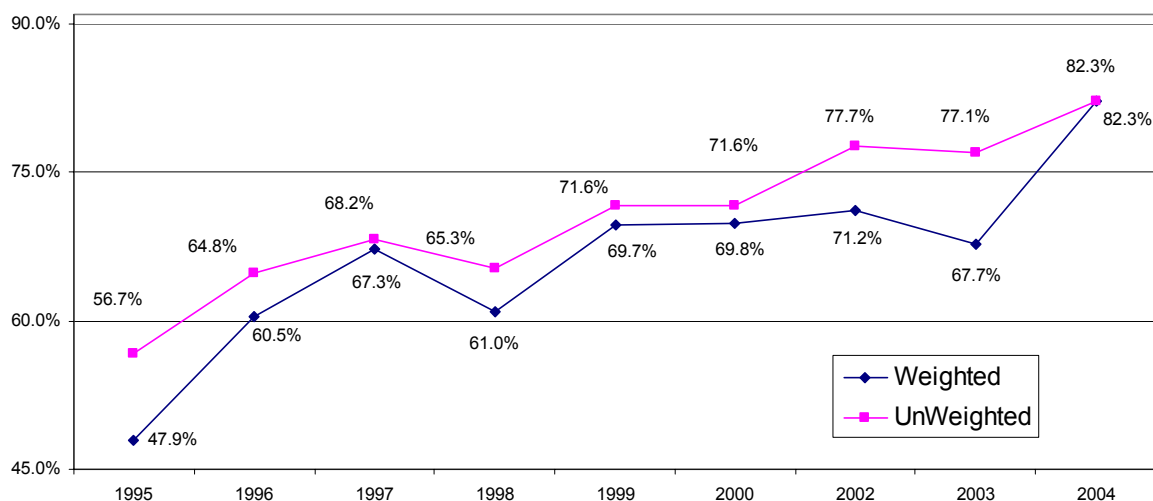
Total retailer compliance results in regards to those provisions of sales-to-minors legislation prohibiting the sale of tobacco products to underage youth are as follows.

1.1 National Results

Retailer compliance is at 82.3% across all stores visited in 2003. This is an increase of 14.6 percentage points from last year's compliance rating of 67.7%.

The increase in compliance from last year is statistically significant. Trend comparisons nationally are accurate +/- 1.2, 19 times out of 20 at the 95% confidence level. The compliance rate represents a significant increase from previous years.

Chart 1 – % Retailers to Sell to Minors – National all Outlets*



*Note: 1995/1996 and 2002 data are from surveys using similar, but not identical methodology to that used in 1997-2000 and 2003-2004. Caution should be exercised when analyzing results for comparative purposes.

The weighted score is an extrapolation of the actual raw scores (sample) achieved by a "weighting factor" to reflect the potential score that would have been achieved if all stores selling tobacco were surveyed (universe). 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 2003, the retailer compliance level across the total raw sample is

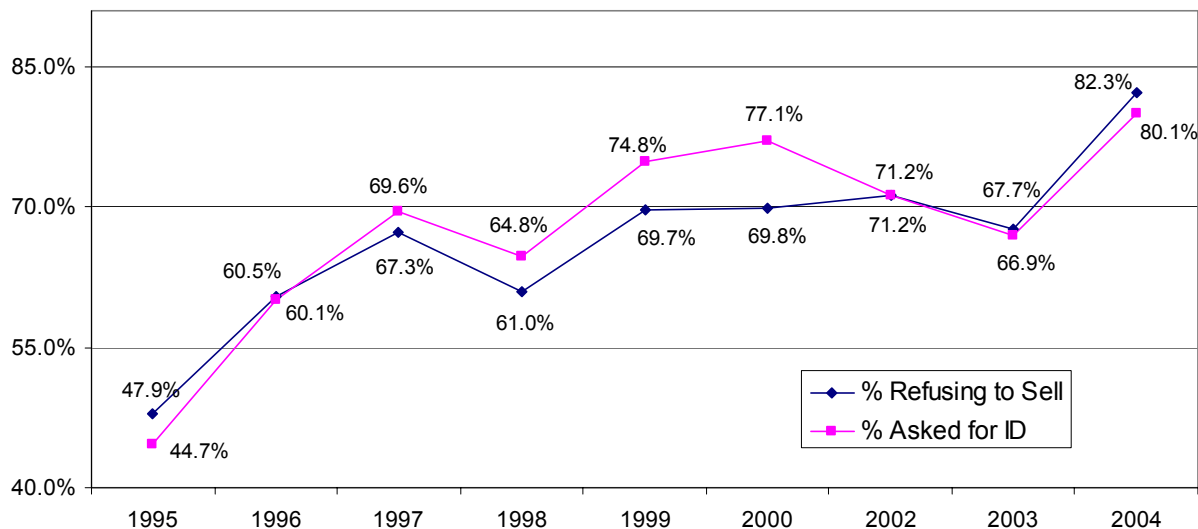
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82.3%, the same as the weighted result and again considerably higher than previous years. Speaking strictly of the raw results, the increase in the un-weighted compliance rate is marginally improving from year to year indicating a higher compliance level by retailers.

This raw trend is important because it provides insight on the meaning of the weighted national compliance figure that has increased significantly. An increase in both the raw figure and the weighted figure indicates a higher compliance level in those larger areas with more influential universe amounts. Samples of large areas have an exponential effect on the total results. Therefore if a sample of a large universe has poor results then the overall results will be poor. Conversely, if samples of large universe levels have good results, the overall national results will improve exponentially as well. (See Section 1.2. of this report).

The increase in the percentage of retailers refusing to sell to underage youth correlates directly with an equivalent increase in the percentage of retailers willing to ask for proof of age. This year's result indicates a compliance of 80.1% when asking for ID, an increase of 13.3% over last year. This year's result is in line with the results in 2000 (77.1%). The trend suggests that the percentage of retailers asking for ID has suffered in 2002 and 2003 and that this year's results return to the upward trend of previous years, 2000 and earlier.

Chart 2 – Weighted – Compliance Trend & % Retailers Asking for ID – National all Outlets*



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

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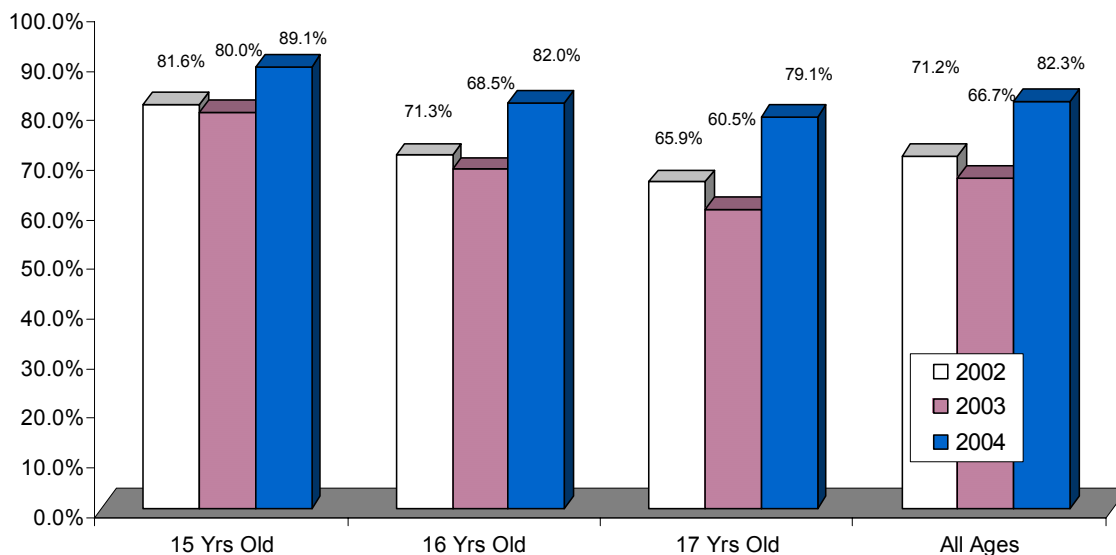
Table 1 – Weighted – Findings Related to Request for Proof of Age – 1999 – 2004
National – All Stores

	1999	2000	2002	2003	2004
% Retailers Asking For ID	74.8%	77.1%	69.9%	66.9%	80.1%
% Retailers Not Asking For ID	25.2%	22.9%	30.1%	33.1%	19.9%
Retailers Who Refused To Sell As % Of Those Asking For ID	89.4%	88.5%	96.0%	97.1%	96.9%
Retailers Who Were Willing To Sell As % Of Those Asking For ID	10.6%	11.5%	4.0%	2.9%	3.1%
Retailers Willing To Sell As % Of Those Not Asking For ID	88.7%	93.0%	86.4%	91.5%	76.5%
Retailers Refusing To Sell As % Of Those Not Asking For ID	11.3%	7.0%	13.6%	8.5%	23.5%

1.1.1 National Results by Age of Minor

As in previous results, the likelihood of retailers' willingness to sell to minors increases with the age of the minor. Although the compliance levels are considerably higher this year than in previous years, there is still a 10% delta between compliance levels for minors that are 15 years of age and minors that are 17 years of age. Significantly better than in previous years are the compliance levels between 16 year olds and 17 year olds.

Chart 3 – Weighted – Sales Compliance Results by Age of Minor
National All Stores % Retailers Refusing Cigarettes to Minors



As illustrated in Table 2, the older the minor the fewer times retailers asked for ID. In the case of teens of all ages of whom ID was requested, almost all retailers refused to sell when no identification was shown. Compliance levels are much higher when retailers ask for ID than when ID is not asked for.

The rate of compliance for 15 year olds where ID was not asked is double that of 16 and 17 year olds. This indicates a greater non-compliance in older ages if ID is not asked

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for by the retailer. The compliance level for 17 year olds when ID is not asked for is much greater this year (17.5%) than the last two years with 2.2% in 2003 and 6.3% in 2002. However, the staggering difference is the increase in compliance levels for 15 year olds when ID is not asked (44.5%) from last year's rate of 14.2%. This year's result is closer to the result in 2002 of 62.3%². This indicates a return to better compliance levels of years prior to last year.

In those provinces where the legal age to purchase tobacco is 18 (Alberta, Manitoba, Saskatchewan, and Québec) compliance levels for 17 year old minors was analysed to discover that out of 1,166 visits the rate of compliance in regards to asking for ID was 73.7%. This compliance level is lower than any of the other age groups as well as the national average and therefore bringing the overall scores down. This result might have occurred because of the proximity of age of the minor to the legal age for purchasing tobacco in those provinces.

Table 2 – Weighted – Findings to Request for Proof of Age of Minor – 2004 National – All Stores

Age Of Minor:	15 Years Old	16 Years Old	17 Years Old
% Retailers Refusing To Sell	89.1%	82.0%	79.1%
% Retailers Asking For ID	83.8%	80.2%	78.2%
% Retailers Not Asking For ID	16.2%	19.8%	21.8%
Retailers Who Refused To Sell As % of Those Asking For ID	97.7%	97.3%	96.2%
Retailers Who Were Willing To Sell As % Those Asking For ID	2.3%	2.7%	3.8%
Retailers Who Refused To Sell As % of Those Not Asking For ID	44.5%	19.9%	17.5%

1.1.2 National Results by Age of Clerk

Compliance levels for clerks having the same age as the minor are sharply lower this year with a score of 58.8% compared to last year (64.6%). The trending this year is similar to previous years where compliance levels increase proportionately with the age up to the "25+ but not a senior" category and then drop off with the "senior" category. Essentially, compliance rates have been shown to vary based on the age of the clerk behind the tobacco counter. Compliance levels have typically been lower when youngest and oldest clerks are involved in a tobacco sale.

The latest data indicates a decrease in compliance levels when the clerk is the same age as the minor and indicated considerable increases in compliance levels where the clerk is older than the minor, and especially when the clerk is a senior. This is considerably better than previous years where the senior clerks had a very low compliance level.

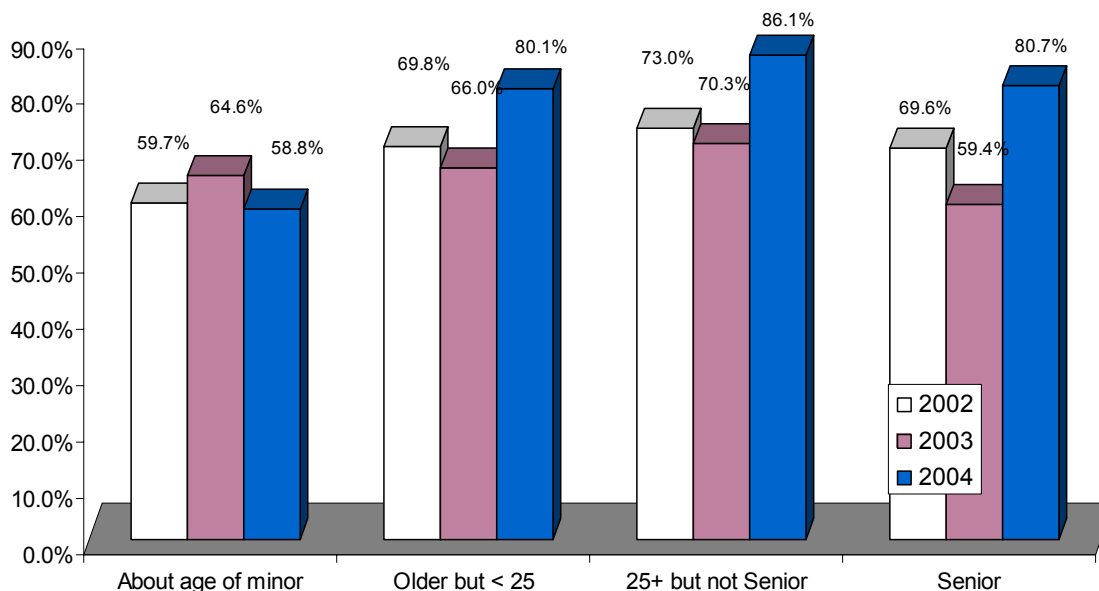
The number of clerks within both the youngest and oldest age cohorts remains a relatively small percentage of staff behind the tobacco counter. The great majority of clerks are of an in-between age. It is no surprise, then, to see that compliance levels for

² In 2002, 62.3% of retailers who did not ask for ID of fifteen year olds refused to sell to these youngsters.

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retailers over 25 years of age, but not seniors, are in line with the national average and have declined versus year ago results in line with the national average.

Chart 4 – Weighted – National – All Stores Types % Retailers Refusing to Sell to Minors by Age of Retailer



1.1.3 National Results by Gender

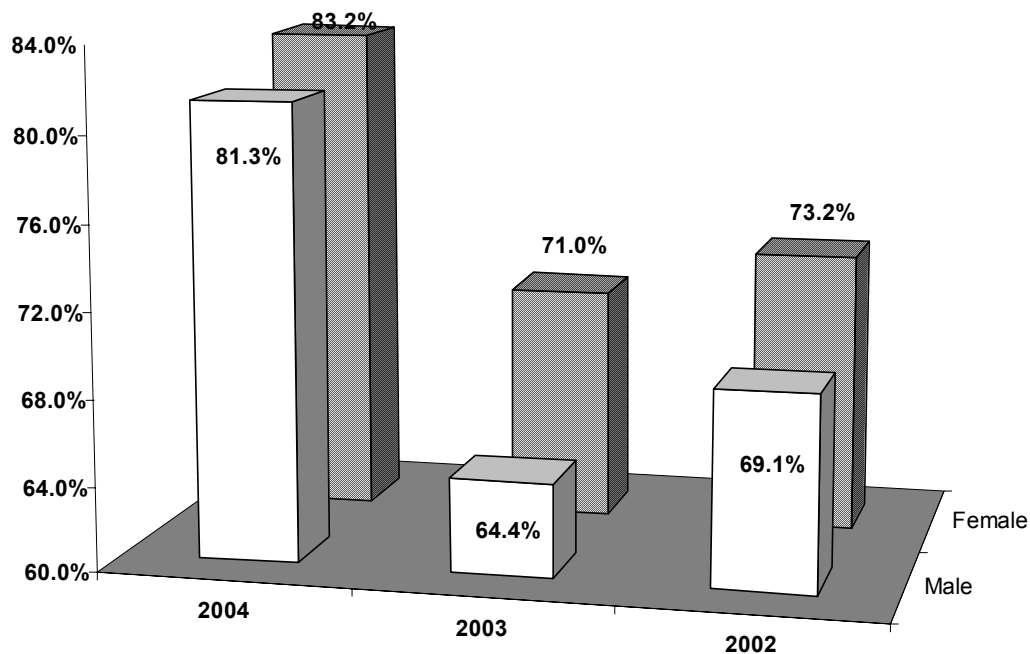
Results by Gender of Minor

The minor gender gap of compliance levels has narrowed considerably this year with boys' compliance levels increasing from previous years to a never seen before level of 81.3% nearly equalling the girls' compliance level of 83.2%.

There is no doubt that the overwhelming performance level in the boy category has greatly increased the national overall compliance levels. Having an even greater affect is the increase in this category in those regions where the weighting factor has an exponential affect on the national score as well.

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



Contributing to the success in the boy category is the considerable increase in the percentage of boys asked for ID, 78.6% up from 63% last year. Surprisingly, there is a considerable increase in the compliance level even when retailers did not ask for ID. Last year they were 8.7% and 8.2% boy/girl respectively and this year they are 24.5% and 22.3% boy/girl respectively.

Table 3 – Weighted – Findings Related to Request for Proof of Age by Gender of Minor – 2004 National – All Stores

Gender of Minor:	Male	Female
% Retailers Refusing To Sell	81.3%	83.2%
% Retailers Asking For ID	78.6%	81.6%
% Retailers Not Asking For ID	21.4%	18.4%
Retailers Refusing To Sell As % of Those Asking For ID	96.8%	97.0%
Retailers Refusing To Sell As % of Those Not Asking For ID	24.5%	22.3%

Results by Gender of Clerk

Although compliance levels are much higher this year from previous years, the gender gap has not changed much. The female category continues to outperform the male category in overall compliance levels, asking for ID levels, and compliance levels when

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asking for ID. The differences between males and females are all within the range of tolerance and are therefore not statistically significant.

Table 4 – Weighted – Compliance Indicators by Gender of Retail Clerk National All Stores - Trended

Gender of Clerk	% Refused To Sell		% Who Asked For ID		% Of Those Asking For ID Who Did Not Sell	
	Male	Female	Male	Female	Male	Female
2004	80.5%	83.8%	79.0%	81.1%	96.2%	97.5%
2003	65.7%	69.4%	64.2%	69.0%	97.7%	96.7%
2002	68.6%	73.2%	67.7%	71.7%	94.2%	97.3%
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%

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.

Compliance levels in stores within the vicinity of schools and malls and those elsewhere flank the national average with only a marginal difference. This year's results are in the reverse order of last year's with compliance levels higher in stores near schools or malls than the national average (lower last year) and compliance levels lower in stores elsewhere than the national average (higher last year). All compliance levels are higher this year than last which is in keeping with the increased national average.

Table 5 – Weighted – Compliance Indicators by Proximity to Schools/Malls National – All Stores– Trended

Store Located:	% Refused To Sell				% Who Asked For ID			
	2000	2002	2003	2004	2000	2002	2003	2004
Near school and/or mall	71.7%	74.0%	66.1%	83.4%	78.9%	72.6%	66.3%	82.2%
Elsewhere	68.5%	68.8%	69.0%	81.2%	75.8%	67.7%	67.3%	78.2%

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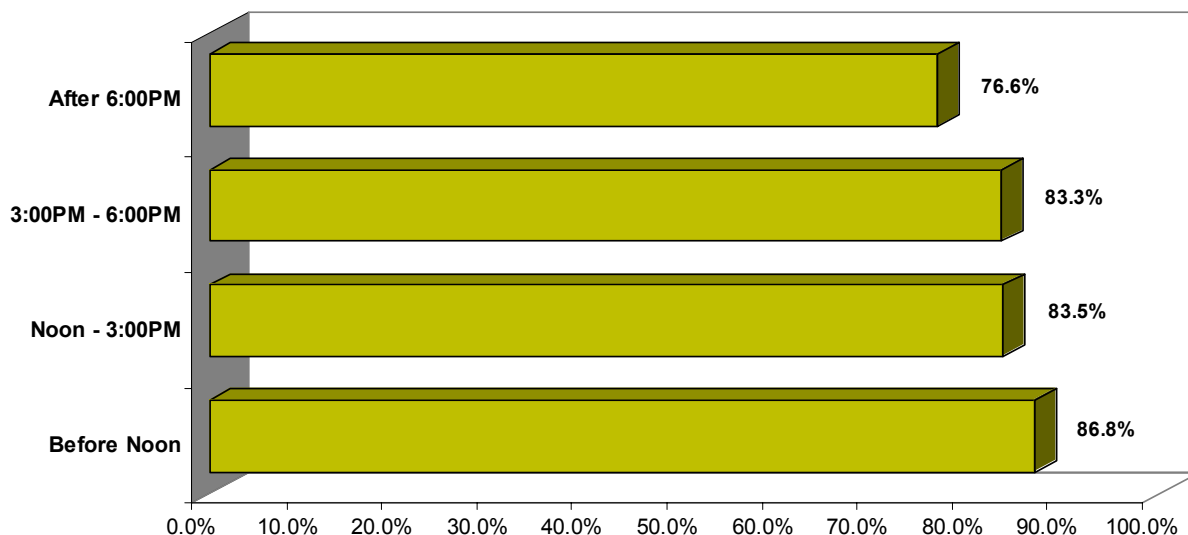
1.1.5 National Results by Time of Visit

Results by Time of Day

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

Approximately 55% of store visits were conducted between noon and 6:00 PM, 26% after 6 pm and 19% before noon. Since the majority of visits were between noon and 6 PM, the results in this category are given more credence than the others. Compliance levels in the early afternoon and the late afternoon are very similar and are both very similar to the national average of 82.3%. The visits to stores after 6 pm and before noon represent 45% of the total visits and have an average of 82% compliance. Essentially the results during the day and outside of the day i.e. before and after are relatively the same with a difference that is statistically non-significant.

Chart 6 – Weighted – % Retailers Unwilling to Sell by Time of Visit National
All Stores - 2004



1.1.6 National Results by Presence of Adults in Store

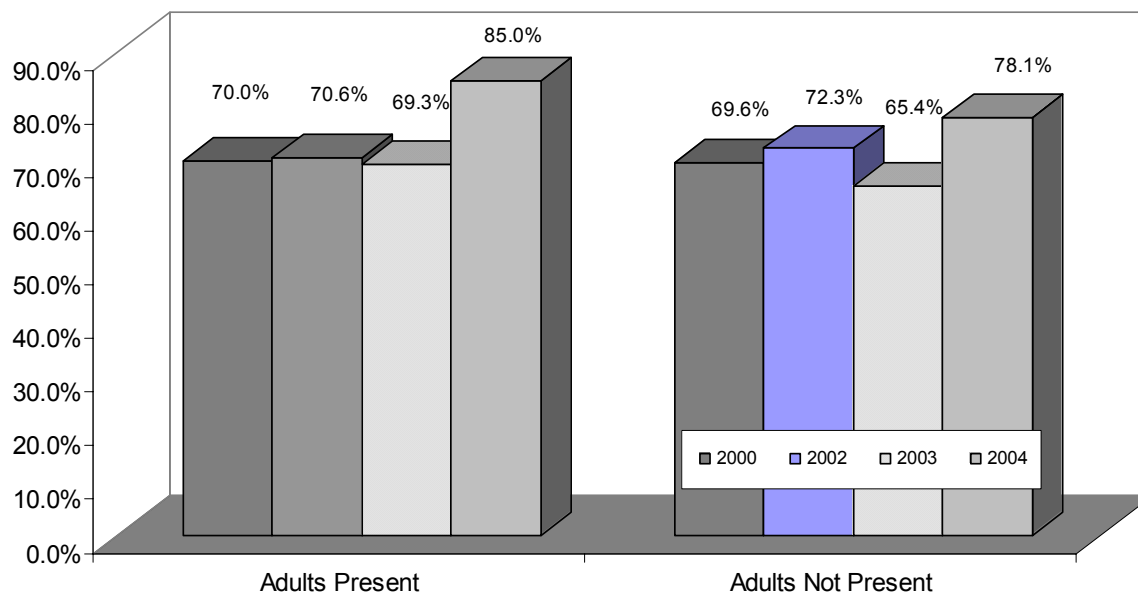
Compliance estimates were tabulated based on the presence of adult customers in the store at the time of our attempt to purchase. The question is whether or not the presence of adult patrons results in retailers being more careful about selling cigarettes to young persons.

Adult customers were present during 60% of the visits. Compliance levels in stores where adults were present are considerably higher this year than in any other year even though fewer stores had adults present while the minors were attempting a purchase.

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Even though compliance levels are slightly lower when adults were not present the compliance levels are still significantly higher than in previous years.

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



1.1.7 National Results by Class of Trade

Retailer compliance grouped by class of trade has increased in each category from previous years. The highest rate of compliance, as in past years, belongs to pharmacies with an increase of approximately 8% from 2002 and approximately an increase of 5% from 2003. Although the number of pharmacies selling tobacco products has reduced, the remaining stores are achieving higher levels of compliance over previous years indicating a continued willingness to prevent sales to minors.

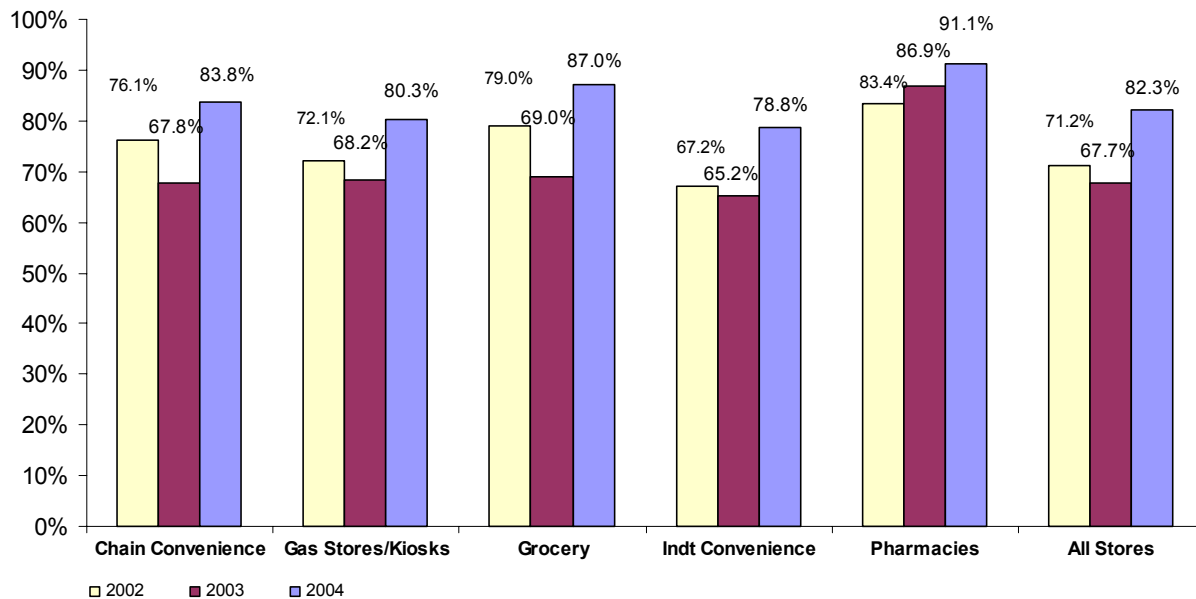
The highest increase in compliance levels was found in chain convenience stores and grocery stores. This is a mentionable change from last year where these categories showed a substantial decrease from previous years. This trend shows a return to performance levels of years prior to 2003 when chain convenience stores and grocery stores achieved higher levels of compliance.

The poor results from last year were aligned with weak performance from chain convenience stores and grocery stores in isolated areas of Québec³. However, this year Québec has shown an outstanding performance level that greatly contributed to increasing the overall national average. The findings regionally are reviewed in detail in Section 1.2.3 of the report.

³ Tobacco sales-to-minors research 2003 Section 1.1.7, ACNielsen

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Chart 8 – Weighted – % Retailers Refusing to Minors by Class of Trade – All Cities – 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.

The National compliance level (retailers refusing to sell cigarettes to minors) in 2004 is 82.3% which is considerably higher than 2003 and represents a statistically significant increase. This year's results are a return to trends being experienced in years prior to 2003, as shown in Table B and 6. The overall compliance rate is the weighted average of conditions across regions and thirty cities.

The overwhelming affect the poor performers in Québec had on the national score last year has completely turned around the national compliance levels for 2004. All cities in Québec showed an increase in compliance levels of greater than 20% resulting in a provincial score increase from 36.6% to 76.5%. The only other province having considerable weight on the national score is Ontario which also showed an increase in compliance levels from 76.3% to 83.9%. Compliance in British Columbia is up from 84.2% to 91.5%, and Alberta, up from 83.2% to 91.8%. Increases were noted in Prince Edward Island's (Charlottetown) increase (from 74.8% to 91.9%) and Newfoundland's

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(St. Johns) increase (from 67.2% to 70.3%). Compliance decreased in Saskatchewan by 5.2%; Manitoba, 26%; New Brunswick, 6.1% and Nova Scotia, 10.4%.

In 2004, compliance levels were significantly improved⁴ (double digit increases) in ten cities and marginally improved in five cities:

- Sherbrooke + 53 points
- Montreal + 34.5 points
- Québec City + 28.3 points
- Chicoutimi/Jonquière + 23.5 points
- Regina + 20 points
- Bathurst + 18.5 points
- Charlottetown + 18.1 points
- Vancouver 3: Delta, Surrey, Langley, North Delta, White Rock + 17.5 points
- Vancouver 1: Vancouver, Richmond + 11.9 points
- Sydney + 11.5 points
- Calgary + 9.3 points
- Edmonton + 8.6 points
- Vancouver (CMA) + 8.6 points
- Ottawa + 5.3 points
- Toronto + 4.7 points

Decreases in compliance were noted in Fredericton (-10.6 points), Saint John (-21.8 points), Halifax (-21 points), Winnipeg (-27.6 points), Saskatoon (-24.6 points), and Vancouver 4 (11.2 points).

Tipping the scale in favour of Québec was the fact that four of the top five increases were in this province. This increase coupled with the heavy weighting Québec has on the national scores resulted in a record setting national compliance level. Other significant increases were found in cities spread through Ontario, Alberta and British Columbia. A surprising result is Winnipeg. Last year, Winnipeg showed its highest increase since reporting started in 1995 (91.8%) and this year it reported its third lowest score ever (64.2%) contributing to making the average for Manitoba the least compliant in Canada (based on the average of compliance rates for cities in Manitoba that were included in this data collection).

Ontario had increases in all cities except Windsor, Sudbury and Thunder Bay. British Columbia was supported by increases in all cities except Campbell River / Courtney and Vancouver 4 (North Vancouver, West Vancouver). Although Alberta only showed an 8.6% increase over last year it is still the best performing province with 91.8%

⁴ Based on a statistical equation designed to measure whether or not the degree of change between studies is statistically significant, at the 95% confidence level, beyond the standard error associated with the sample sizes and universe estimates in each city.

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compliance slightly passing British Columbia with a 91.5% compliance level. Manitoba is now the lowest performer at 64.5% and Newfoundland is the second lowest at 70.3%.

Last year we found that nineteen of thirty communities visited (63%) had already reached or surpassed eighty percent compliance⁵. This year, that figure has improved to twenty three communities (77%). Fifteen of these surpassed 90%.

Below is the list of cities reporting compliance of seventy-five percent or better:

RED DEER	100.00%	CHICOUTIMI/JONQUIERE	91.27%
MEDICINE HAT	98.44%	EDMONTON	89.61%
BATHURST	97.22%	MONCTON	86.84%
OTTAWA	95.79%	SHERBROOKE	86.79%
KELOWNA	95.65%	CAMPBELL RIVER/COURTNAY	84.52%
KINGSTON	93.83%	THUNDER BAY	84.00%
SYDNEY	93.75%	ST. CATHARINES	81.50%
REGINA	92.97%	SUDBURY	80.00%
CHARLOTTETOWN	91.86%	QUEBEC CITY	77.98%
WINDSOR	91.82%	FREDERICTON	75.68%
VANCOUVER	91.80%	TORONTO	75.00%
CALGARY	91.67%		

The list contains five cities that were not on last year's list of cities with highest compliance: Regina, Chicoutimi/Jonquière, Sherbrooke, Québec City and Toronto⁶. Eighteen cities stayed on this year's list and three cities fell off (Halifax, Winnipeg, and Saskatoon).

In ten cities compliance levels were lower in 2004 than in 2003 by a statistically significant amount. Although the national compliance rate is higher than in year's past (82.3%), the cumulative importance of the declines in these cities negatively affected this year's national result.

- Winnipeg – 27.6 points
- Saskatoon – 24.6 points
- Saint John – 21.8 points
- Halifax – 21.0 points
- Fredericton – 10.6 points
- Windsor – 8.2 points
- Brandon – 7.2 points
- Campbell River/Courtney – 5.3 points
- Thunder Bay – 3.6 points
- Sudbury – 2.4 points

⁵ Final Report of Findings 2003: ACNielsen 2003

⁶ Final Report of Findings 2003: ACNielsen 2003

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Interestingly, the list includes five cities that still remain among those where retailer compliance is highest (i.e., at least seventy-five percent): Fredericton, Windsor, Campbell River/Courtney, Thunder Bay and Sudbury. While the decrease in scores is noticeable, the ending scores are still considered to be high. Retailers in these cities remain among the most likely of any in the country to refuse a tobacco sale to underage youth.

Unlike last year where all four cities in Québec showed considerable decreases, this year all four cities have the highest increase and the highest overall compliance figures with only one city scoring under 75%⁷. Montreal showed an impressive increase from 32.5% last year to 67% this year. The largest increase of the four cities surveyed in Québec belongs to Sherbrooke with a 33.8% score last year and an 86.8% score this year.

This increase in compliance in stores studied within the cities in Québec is statistically significant and is having a major influence on the overall national results. Being one of Canada's largest provinces and therefore having a significant weighting factor, the positive scores had an exponential effect on the overall scores.

Montreal's weighting factor is the highest of all regions given its sample size and population size therefore any change in this region's score has paramount effect on the national score. Therefore a one point change either way in Montreal has as much as a 0.2% change on the national average.

Conditions in these Quebec markets figure in the national result in another significant way. Three of the four regions scored above 75% and all four represent four of the top five increases in Canada.

	<u>2003</u>	<u>2004</u>	<u>Variance</u>
Chicoutimi/Jonquière	67.8%	91.3%	23.5%
Montreal	32.5%	67.0%	34.5%
Québec City	49.7%	78.0%	28.3%
Sherbrooke	33.8%	86.8%	53.0%

A year ago, three of the cities in Québec scored under 60% and were the only cities that performed this poorly. This year all the cities in Québec scored better than 60%.

Finally, we found no statistically significant change (+/- 2 points) in retailer compliance levels in two cities:

- Red Deer – 0 points
- St. Catharines – 1.1 points

⁷ Final Report of Findings 2003: ACNielsen 2003

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Table 6 – Weighted – % Retailers Refusing to Sell by Region – Trended

REGION	1995 Results	1996 Results	1997 Results	1998 Results	1999 Results	2000 Results	2002 Results	2003 Results	2004 Results
NATIONAL	NA	NA	NA	NA	NA	NA	71.2%	67.7%	82.3%
NATIONAL (CORE)	47.9%	60.5%	67.3%	61.0%	69.7%	69.8%	70.3%	66.7%	81.9%
ST. JOHNS	33.2%	58.4%	83.4%	79.6%	52.4%	87.8%	98.2%	67.2%	70.3%
CHARLOTTETOWN	90.4%	34.3%	72.9%	77.9%	86.0%	86.0%	75.6%	74.8%	91.9%
NEW BRUNSWICK	NA	NA	NA	NA	NA	NA	81.6%	78.7%	72.6%
NEW BRUNSWICK CORE	88.8%	84.8%	58.0%	40.7%	42.1%	72.7%	73.1%	76.6%	67.2%
BATHURST	8.3%	38.7%	60.0%	22.6%	60.3%	95.4%	59.1%	78.7%	97.2%
FREDERICTON	99.9%	89.5%	49.3%	39.8%	30.2%	79.9%	84.9%	86.3%	75.7%
MONCTON	NA	NA	NA	NA	NA	NA	98.5%	82.8%	86.8%
SAINT JOHN	94.2%	87.6%	61.5%	42.7%	45.9%	67.1%	73.1%	70.2%	48.4%
NOVA SCOTIA	75.5%	89.8%	64.1%	69.3%	73.3%	70.9%	63.8%	89.7%	79.3%
HALIFAX	NA	NA	57.4%	62.2%	84.5%	76.8%	54.1%	92.8%	71.8%
SYDNEY	96.8%	98.1%	80.5%	86.5%	45.3%	52.2%	86.1%	82.3%	93.8%
QUEBEC	23.9%	28.8%	45.4%	48.7%	65.2%	47.0%	57.0%	36.6%	76.5%
CHICOUTIMI/JONQUIERE	16.0%	14.3%	49.0%	47.9%	72.2%	64.5%	80.4%	67.8%	91.3%
MONTREAL	27.7%	27.9%	45.4%	62.0%	69.3%	63.2%	54.2%	32.5%	67.0%
QUEBEC CITY	9.1%	33.8%	44.8%	25.1%	57.3%	18.5%	58.4%	49.7%	78.0%
SHERBROOKE	32.7%	45.9%	45.0%	47.5%	69.4%	41.1%	87.1%	33.8%	86.8%
ONTARIO	NA	NA	NA	NA	NA	NA	74.8%	76.3%	83.9%
ONTARIO CORE	62.2%	73.3%	69.4%	62.0%	79.1%	83.7%	73.6%	75.3%	83.7%
KINGSTON	NA	NA	NA	NA	NA	NA	88.7%	90.1%	93.8%
OTTAWA	40.1%	46.5%	72.1%	55.5%	84.3%	68.6%	97.6%	90.5%	95.8%
ST. CATHARINES	NA	NA	NA	NA	NA	NA	77.1%	80.4%	81.5%
SUDBURY	74.2%	61.1%	80.2%	79.7%	84.1%	59.6%	66.7%	82.4%	80.0%
THUNDER BAY	NA	NA	NA	NA	NA	NA	96.2%	87.6%	84.0%
TORONTO	68.6%	77.3%	67.9%	62.4%	78.5%	87.5%	67.8%	70.3%	75.0%
WINDSOR	63.1%	93.2%	86.5%	63.0%	73.0%	60.0%	97.9%	100.0%	91.8%
MANITOBA	56.5%	76.8%	72.1%	67.7%	83.7%	78.9%	65.2%	90.5%	64.5%
BRANDON	61.0%	69.3%	47.2%	79.8%	92.6%	84.5%	84.9%	73.9%	66.7%
WINNIPEG	56.4%	76.9%	72.3%	67.5%	83.6%	78.8%	63.6%	91.8%	64.2%
SASKATCHEWAN	30.1%	77.8%	66.9%	73.8%	78.9%	81.4%	93.4%	81.7%	76.5%
REGINA	NA	NA	58.6%	72.5%	70.7%	80.1%	95.2%	73.0%	93.0%
SASKATOON	NA	NA	74.6%	75.2%	85.9%	82.6%	91.9%	89.0%	64.4%
ALBERTA	NA	NA	NA	NA	NA	NA	87.0%	83.2%	91.8%
ALBERTA CORE	60.1%	68.6%	80.3%	75.4%	73.6%	67.3%	87.3%	82.3%	91.3%
CALGARY	42.1%	55.9%	82.6%	82.6%	63.2%	63.0%	95.0%	82.4%	91.7%
EDMONTON	75.4%	78.7%	78.1%	68.2%	85.4%	71.7%	79.6%	81.0%	89.6%
MEDICINE HAT	95.6%	93.4%	69.4%	62.5%	6.6%	95.6%	89.9%	95.4%	98.4%
RED DEER	NA	NA	NA	NA	NA	NA	81.3%	100.0%	100.0%
BRITISH COLUMBIA	69.2%	74.0%	77.7%	60.3%	59.3%	75.3%	69.3%	84.2%	91.5%
KELOWNA	53.2%	53.6%	82.9%	87.6%	98.2%	63.8%	100.0%	93.3%	95.7%
CAMPBELL RIVER/COURTNAY	100.0%	100.0%	94.5%	86.8%	98.2%	85.1%	97.6%	89.8%	84.5%
VANCOUVER CMA	69.1%	74.0%	77.5%	59.6%	58.2%	75.4%	65.5%	83.2%	91.8%
VANCOUVER 1	NA	NA	NA	NA	NA	NA	62.2%	81.4%	93.3%
VANCOUVER 2	NA	NA	NA	NA	NA	NA	63.8%	89.3%	93.5%
VANCOUVER 3	NA	NA	NA	NA	NA	NA	71.3%	81.1%	98.6%
VANCOUVER 4	NA	NA	NA	NA	NA	NA	72.3%	81.4%	70.2%

NA = Not applicable to that study period - year or city.

*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, Pitt Meadows, New Westminster

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

Vancouver 4: North Vancouver, West Vancouver

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Table 7 – Weighted – Sales to Minors Compliance Results by City/Province/Region – 2004

REGION	% unwilling to sell (compliant)	% willing to sell (non-compliant)	% who asked for ID	% who asked for ID but did not sell	% who asked for ID and were willing to sell	% who did not ask for ID and were willing to sell
NATIONAL (All Cities)	82.3%	17.7%	80.1%	96.9%	3.1%	76.5%
NATIONAL (CORE 25)	81.9%	18.1%	80.4%	96.9%	3.1%	79.6%
ST. JOHN'S	70.3%	29.7%	69.7%	98.5%	1.5%	94.9%
CHARLOTTETOWN	91.9%	8.1%	89.5%	98.7%	1.3%	66.7%
NEW BRUNSWICK	72.6%	27.4%	65.0%	92.8%	7.2%	64.9%
NEW BRUNSWICK CORE	67.2%	32.8%	64.7%	92.3%	7.7%	78.9%
BATHURST	97.2%	2.8%	97.2%	97.1%	2.9%	0.0%
FREDERICTON	75.7%	24.3%	62.2%	100.0%	0.0%	64.3%
MONCTON	86.8%	13.2%	65.8%	94.0%	6.0%	26.9%
SAINT JOHN	48.4%	51.6%	53.8%	81.6%	18.4%	90.5%
NOVA SCOTIA	79.3%	20.7%	81.9%	93.8%	6.2%	86.8%
HALIFAX	71.8%	28.2%	74.2%	91.8%	8.2%	85.9%
SYDNEY	93.8%	6.3%	96.9%	96.8%	3.2%	100.0%
QUEBEC	76.5%	23.5%	73.6%	97.6%	2.4%	82.4%
CHICOUTIMI/JONQUIERE	91.3%	8.7%	83.3%	100.0%	0.0%	52.4%
MONTREAL	67.0%	33.0%	64.8%	97.0%	3.0%	88.3%
QUEBEC CITY	78.0%	22.0%	74.6%	98.0%	2.0%	80.7%
SHERBROOKE	86.8%	13.2%	88.7%	95.7%	4.3%	83.3%
ONTARIO	83.9%	16.1%	80.8%	97.0%	3.0%	71.3%
ONTARIO CORE	83.7%	16.3%	81.5%	97.1%	2.9%	75.3%
KINGSTON	93.8%	6.2%	88.9%	97.2%	2.8%	33.3%
OTTAWA	95.8%	4.2%	96.3%	99.5%	0.5%	100.0%
ST. CATHARINES	81.5%	18.5%	74.4%	98.8%	1.2%	69.0%
SUDBURY	80.0%	20.0%	70.5%	93.2%	6.8%	51.6%
THUNDER BAY	84.0%	16.0%	85.3%	90.6%	9.4%	54.5%
TORONTO	75.0%	25.0%	75.2%	95.8%	4.2%	88.2%
WINDSOR	91.8%	8.2%	84.3%	98.5%	1.5%	44.0%
MANITOBA	64.5%	35.5%	62.4%	97.6%	2.4%	90.6%
BRANDON	66.7%	33.3%	64.1%	96.0%	4.0%	85.7%
WINNIPEG	64.2%	35.8%	62.2%	97.8%	2.2%	91.2%
SASKATCHEWAN	76.5%	23.5%	82.1%	91.1%	8.9%	90.7%
REGINA	93.0%	7.0%	93.8%	98.3%	1.7%	87.5%
SASKATOON	64.4%	35.6%	73.6%	84.4%	15.6%	91.3%
ALBERTA	91.8%	8.2%	85.8%	98.4%	1.6%	47.8%
ALBERTA CORE	91.3%	8.7%	86.1%	98.3%	1.7%	51.9%
CALGARY	91.7%	8.3%	87.4%	98.4%	1.6%	54.5%
EDMONTON	89.6%	10.4%	82.2%	98.2%	1.8%	50.0%
MEDICINE HAT	98.4%	1.6%	100.0%	98.4%	1.6%	0.0%
RED DEER	100.0%	0.0%	79.5%	100.0%	0.0%	0.0%
BRITISH COLUMBIA	91.5%	8.5%	91.3%	97.9%	2.1%	75.9%
KELOWNA	95.7%	4.3%	94.6%	98.9%	1.1%	60.0%
CAMPBELL RIVER / COURTNAY	84.5%	15.5%	91.7%	92.2%	7.8%	100.0%
VANCOUVER CMA	91.8%	8.2%	90.9%	98.4%	1.6%	74.6%
VANCOUVER 1	93.3%	6.7%	93.8%	99.1%	0.9%	93.3%
VANCOUVER 2	93.5%	6.5%	91.2%	98.5%	1.5%	57.9%
VANCOUVER 3	98.6%	1.4%	95.9%	99.5%	0.5%	22.2%
VANCOUVER 4	70.2%	29.8%	73.1%	93.4%	6.6%	92.9%

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

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1.2.1 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 many cities the sample size fell below 100 stores. Therefore, it was not practical to engage teen test shoppers of each age group. In seventeen cities: St. John's, Charlottetown, Fredericton, Moncton, Saint John, Sidney, Chicoutimi/Jonquière, Sherbrooke, Kingston, Sudbury, Thunder Bay, Windsor, Regina, Saskatoon, Medicine Hat, Kelowna and Campbell River/Courtnay, plus Vancouver Region #4, teens representative of two of the three age groups were used. In three cities: Bathurst, Brandon, and Red Deer, only sixteen year olds were used.

Close to the national average were compliance levels with 15 and 16 year olds. 17 year olds had a compliance level lower than the national average. The older the teen, the more likely retailers were willing to sell. The trend is consistent with results of past surveys. However compliance levels are considerably higher this year than in 2003.

At a regional level, the poorest results involving retailers confronted by seventeen year olds requesting to make a purchase are isolated to a handful of communities; Saint John, Montreal, Winnipeg, Saskatoon and Vancouver Region #4 all recorded compliance at less than 60%.

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

- 15 year olds: among twenty-two cities where stores were visited by fifteen year olds, only three cities scored below 80% with the lowest being Halifax with a compliance level of 45.2%. Five retailers scored between 80% and 90% and retailers in sixteen cities scored higher than 90%;
- 16 year olds: among twenty-five cities where stores were visited by sixteen year olds, retailers in nine cities scored below 80%, retailers in three cities scored between 80% and 90% and thirteen cities scored greater than 90%. Two cities had compliance levels below sixty percent. These are Saint John (51.1%), Winnipeg (53.2%). Last year there were four cities scoring below 60%;
- 17 year olds: retailers in eleven cities scored below 80%, retailers in seven cities scored between 80% and 90% and retailers in seven cities scored higher than 90% out of a total of 27 cities in which seventeen year olds attempted to buy cigarettes. The poorest performers are: Saint John (45.5%), Montreal (58.1%), Winnipeg (57.4%), and Saskatoon (45.1%);

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- finally, the increased performance from last year is the direct result of cities in both Ontario and especially Québec where compliance levels were considerably higher than in 2003.

Table 8 – Weighted - % Retailers Unwilling to Sell by Age of Minors
Sales to Minors Compliance Results by City/Province/Region 2004

	% 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	82.3%	89.1%	82.0%	79.1%
NATIONAL (CORE)	81.9%	89.0%	81.0%	78.8%
ST. JOHNS	70.3%	72.4%	NA	68.0%
CHARLOTTETOWN	91.9%	97.7%	NA	86.0%
NEW BRUNSWICK	72.6%	77.5%	70.0%	73.5%
NEW BRUNSWICK CORE	67.2%	NA	70.0%	63.0%
BATHURST	97.2%	NA	97.2%	NA
FREDERICTON	75.7%	NA	67.6%	83.8%
MONCTON	86.8%	77.5%	NA	97.2%
SAINT JOHN	48.4%	NA	51.1%	45.5%
NOVA SCOTIA	79.3%	70.4%	86.9%	82.6%
HALIFAX	71.8%	45.2%	86.9%	77.6%
SYDNEY	93.8%	95.2%	NA	92.3%
QUEBEC	76.5%	89.0%	74.0%	72.1%
CHICOUTIMI/JONQUIERE	91.3%	NA	90.9%	91.7%
MONTREAL	67.0%	87.8%	71.1%	58.1%
QUEBEC CITY	78.0%	84.6%	62.4%	82.9%
SHERBROOKE	86.8%	98.0%	NA	76.8%
ONTARIO	83.9%	93.8%	78.6%	80.6%
ONTARIO CORE	83.6%	93.1%	73.9%	81.2%
KINGSTON	93.8%	95.2%	NA	92.3%
OTTAWA	95.8%	100.0%	92.6%	95.3%
ST. CATHARINES	81.5%	95.9%	93.3%	72.2%
SUDBURY	80.0%	92.0%	0.0%	69.1%
THUNDER BAY	84.0%	NA	77.8%	89.7%
TORONTO	75.0%	90.0%	61.3%	74.6%
WINDSOR	91.8%	92.2%	0.0%	91.5%
MANITOBA	64.5%	90.3%	57.3%	57.7%
BRANDON	66.7%	NA	65.8%	100.0%
WINNIPEG	64.2%	90.3%	53.2%	57.4%
SASKATCHEWAN	76.5%	91.7%	98.5%	60.7%
REGINA	93.0%	NA	98.5%	86.9%
SASKATOON	64.4%	91.7%	0.0%	45.1%
ALBERTA	91.8%	95.9%	87.0%	93.6%
ALBERTA CORE	91.3%	95.9%	84.5%	93.6%
CALGARY	91.7%	99.1%	79.8%	96.5%
EDMONTON	89.6%	89.1%	78.0%	92.2%
MEDICINE HAT	98.4%	NA	98.4%	NA
RED DEER	100.0%	NA	100.0%	NA
BRITISH COLUMBIA	91.5%	95.3%	94.9%	88.1%
KELOWNA	95.7%	NA	97.9%	93.2%
CAMPBELL RIVER/COURTNAY	84.5%	NA	88.1%	81.0%
VANCOUVER CMA	91.8%	95.3%	95.6%	88.3%
VANCOUVER 1	93.3%	90.3%	100.0%	91.9%
VANCOUVER 2	93.5%	96.4%	96.2%	90.7%
VANCOUVER 3	98.6%	100.0%	100.0%	97.4%
VANCOUVER 4	70.2%	NA	86.3%	54.7%

Vancouver 1: Vancouver, Richmond

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

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Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

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:

- seniors had an overall national compliance of 80.7% out of the 28 cities in which seniors were clerks. The highest performing provinces in this regard are Ontario (92.4%), Saskatchewan (93.8%), Alberta (96.7%), and British Columbia (92.2%). This is a considerable increase over 2003 when senior clerks had the lowest in compliance levels at 59.4%;
- the lowest overall national compliance rate belonged to the age group similar to that of the minor with 58.8% with only one province scoring above 80% (Alberta 84.2%) and the two largest provinces Ontario and Québec scoring 72.4% and 48.3% respectively. This year's results are slightly lower than last year's at 64.6%. This age group moved from second lowest to lowest as a result of the improved performance by the senior citizen group;
- clerks who are young adults (i.e., older than teens, but under 25 years of age) had an overall compliance of 80.1%;
- the highest overall compliance level belonged to clerks older than 25 but not senior at 86.1%. Only two cities out of thirty scored below 70%, four cities scored in the 70th percentile, nine cities in the 80th percentile, and the remaining 15 cities scored above 90%;
- in sixteen of thirty cities, young adult clerks scored compliance levels above the national average. In six cities, compliance for clerks in this age group was between 80% and 90% and in eleven cities compliance was greater than 90%. In this regard, only one city scored compliance less than 60%, Saint John at 38.9%;
- typically, the age of the clerk behind the tobacco counter made little if any difference in cities reporting the very highest levels of compliance.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 9 – Weighted – Sales to Minors Compliance Results by City/Province/Region
% Retailers Unwilling to Sell by Age of Clerk - 2004

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	82.3%	58.8%	80.1%	86.1%	80.7%
NATIONAL (CORE)	81.9%	56.6%	79.7%	85.9%	79.6%
ST. JOHNS	70.3%	75.0%	71.0%	70.4%	62.5%
CHARLOTTETOWN	91.9%	76.9%	93.1%	95.2%	100.0%
NEW BRUNSWICK	72.6%	43.2%	73.3%	80.7%	68.0%
NEW BRUNSWICK CORE	67.2%	38.7%	67.9%	77.7%	60.0%
BATHURST	97.2%	N/A	100.0%	96.2%	100.0%
FREDERICTON	75.7%	33.3%	77.4%	83.3%	100.0%
MONCTON	86.8%	66.7%	89.5%	87.0%	100.0%
SAINT JOHN	48.4%	40.9%	38.9%	60.5%	38.5%
NOVA SCOTIA	79.3%	73.3%	71.4%	83.6%	78.3%
HALIFAX	71.8%	72.7%	61.3%	76.8%	75.0%
SYDNEY	93.8%	75.0%	91.9%	95.2%	100.0%
QUEBEC	76.5%	48.3%	74.5%	81.7%	71.9%
CHICOUTIMI/JONQUIERE	91.3%	50.0%	90.0%	94.4%	66.7%
MONTREAL	67.0%	46.2%	65.0%	72.3%	65.9%
QUEBEC CITY	78.0%	40.0%	77.1%	81.5%	77.5%
SHERBROOKE	86.8%	75.0%	84.5%	90.5%	100.0%
ONTARIO	83.9%	72.4%	84.2%	83.7%	92.4%
ONTARIO CORE	83.6%	70.0%	85.4%	82.9%	91.7%
KINGSTON	93.8%	100.0%	92.9%	93.0%	100.0%
OTTAWA	95.8%	100.0%	96.5%	95.5%	94.4%
ST. CATHARINES	81.5%	81.8%	78.3%	82.4%	100.0%
SUDBURY	80.0%	57.1%	85.0%	87.5%	83.3%
THUNDER BAY	84.0%	66.7%	82.8%	89.5%	50.0%
TORONTO	75.0%	66.7%	73.1%	73.7%	96.4%
WINDSOR	91.8%	85.7%	96.0%	91.0%	50.0%
MANITOBA	64.5%	46.3%	69.0%	68.5%	54.3%
BRANDON	66.7%	28.6%	66.7%	81.3%	100.0%
WINNIPEG	64.2%	50.0%	69.4%	66.9%	52.9%
SASKATCHEWAN	76.5%	31.7%	78.3%	87.2%	93.8%
REGINA	93.0%	87.5%	92.9%	93.0%	100.0%
SASKATOON	64.4%	18.2%	65.6%	82.4%	88.9%
ALBERTA	91.8%	84.2%	90.2%	92.7%	96.7%
ALBERTA CORE	91.3%	81.8%	89.4%	92.4%	96.4%
CALGARY	91.7%	76.9%	93.2%	91.4%	100.0%
EDMONTON	89.6%	84.2%	83.7%	92.2%	92.9%
MEDICINE HAT	98.4%	100.0%	100.0%	97.9%	N/A
RED DEER	100.0%	100.0%	100.0%	100.0%	100.0%
BRITISH COLUMBIA	91.5%	68.8%	88.2%	93.5%	92.2%
KELOWNA	95.7%	100.0%	90.9%	98.2%	N/A
CAMPBELL RIVER/COURTNAY	84.5%	100.0%	73.1%	89.1%	100.0%
VANCOUVER CMA	91.8%	61.5%	89.7%	93.5%	91.9%
VANCOUVER 1	93.3%	100.0%	82.9%	96.0%	92.0%
VANCOUVER 2	93.5%	33.3%	91.0%	96.1%	100.0%
VANCOUVER 3	98.6%	80.0%	98.5%	100.0%	95.7%
VANCOUVER 4	70.2%	50.0%	73.1%	70.1%	71.4%

N/A = Not Applicable to that study period - year or city

Vancouver 1: Vancouver, Richmond

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

1.2.3 Regional Results by Class of Trade (Table 10)

Last year's poor performance from chain convenience stores and grocery stores in parts of Québec and Atlantic Canada has reversed this year greatly affecting the national average. The increase in compliance levels in Québec has a greater weight on the national score because of its sheer size and subsequently it's weighting factor.

Below are highlights of the findings regionally across classes of trade:

- the highest level of compliance is found within pharmacies at a rate of 91.1%. Fewer and fewer pharmacies are selling tobacco products indicating inconclusive results in this category since it is not representative of tobacco sales to minors compliance levels across the country;
- the second highest compliance levels belong to grocery stores with 87% with twenty four out of thirty cities scoring above 80%. Only one city scored below 60% and that was Saint John with 57.1%;
- the overall chain convenience store compliance level is 83.8%. Contributing to this success are the eighteen out of twenty nine stores scoring above 80%. The lowest scores belonged to Fredericton (57.1%), Saint John (33.3%), and Halifax (56.7%);
- retailers in independent convenience stores continue to report the lowest overall rate of compliance with tobacco-sales-to-minors provisions. Although it is the lowest, it still had a respectable result with 78.8% compliance only marginally lower than the national average of 82.3%. This is a considerable improvement from last year's score of 65.2% for this class of trade. The province contributing to the lower score among this class of trade is Manitoba with 48.1%. The province contributing to its increase over last year is Québec with 74.4% versus last year at 40.1%. All cities in this province showed great increases for this class of trade;
- gas retail outlets showed a remarkable increase over last year with 80.3% versus 68.2% in 2003. Gas retail outlets showed the same pattern as the independent convenience stores with great increases in Québec.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 10 – Weighted – Sales to Minors Compliance by City/Province/Region
% Retailers Unwilling to Sell by Class of Trade - 2004

Region	% 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	82.3%	83.8%	80.3%	87.0%	78.8%	91.1%
NATIONAL (CORE)	81.9%	84.0%	80.3%	86.7%	77.5%	90.9%
ST. JOHNS	70.3%	76.5%	81.8%	95.8%	53.3%	85.0%
CHARLOTTETOWN	91.9%	90.9%	84.0%	100.0%	93.5%	100.0%
NEW BRUNSWICK	72.6%	51.7%	80.3%	80.0%	72.0%	N/A
NEW BRUNSWICK CORE	67.2%	43.8%	74.5%	73.3%	66.7%	N/A
BATHURST	97.2%	N/A	100.0%	100.0%	95.0%	N/A
FREDERICTON	75.7%	57.1%	78.9%	80.0%	76.7%	N/A
MONCTON	86.8%	61.5%	91.7%	100.0%	91.2%	N/A
SAINT JOHN	48.4%	33.3%	46.7%	57.1%	50.0%	N/A
NOVA SCOTIA	79.3%	64.3%	74.8%	86.4%	83.7%	N/A
HALIFAX	71.8%	56.7%	66.2%	72.7%	77.5%	N/A
SYDNEY	93.8%	83.3%	89.5%	100.0%	97.0%	N/A
QUEBEC	76.5%	76.6%	78.5%	77.2%	74.4%	N/A
CHICOUTIMI/JONQUIERE	91.3%	100.0%	90.3%	94.1%	89.4%	N/A
MONTREAL	67.0%	71.4%	70.2%	60.7%	65.1%	N/A
QUEBEC CITY	78.0%	78.6%	82.1%	89.9%	68.5%	N/A
SHERBROOKE	86.8%	83.3%	83.3%	100.0%	86.4%	N/A
ONTARIO	83.9%	86.1%	80.3%	87.9%	83.2%	N/A
ONTARIO CORE	83.6%	86.8%	81.8%	87.4%	80.0%	N/A
KINGSTON	93.8%	94.4%	85.7%	100.0%	97.0%	N/A
OTTAWA	95.8%	96.1%	98.5%	95.6%	92.5%	N/A
ST. CATHARINES	81.5%	81.9%	72.2%	90.0%	85.2%	N/A
SUDBURY	80.0%	100.0%	74.3%	100.0%	69.2%	N/A
THUNDER BAY	84.0%	85.7%	78.6%	75.0%	89.7%	N/A
TORONTO	75.0%	76.5%	67.6%	80.6%	75.2%	N/A
WINDSOR	91.8%	94.1%	95.6%	100.0%	84.9%	N/A
MANITOBA	64.5%	67.2%	63.7%	76.3%	48.1%	76.1%
BRANDON	66.7%	75.0%	52.9%	100.0%	66.7%	50.0%
WINNIPEG	64.2%	66.7%	66.2%	73.1%	45.8%	77.3%
SASKATCHEWAN	76.5%	81.8%	69.8%	79.4%	80.0%	81.1%
REGINA	93.0%	90.0%	88.2%	100.0%	96.0%	100.0%
SASKATOON	64.4%	75.0%	55.4%	63.2%	66.7%	72.2%
ALBERTA	91.8%	95.7%	86.8%	93.8%	86.5%	96.6%
ALBERTA CORE	91.3%	95.6%	86.0%	93.5%	85.2%	96.4%
CALGARY	91.7%	95.6%	84.4%	97.9%	84.1%	98.4%
EDMONTON	89.6%	95.3%	84.3%	89.7%	81.3%	93.9%
MEDICINE HAT	98.4%	100.0%	95.8%	100.0%	100.0%	100.0%
RED DEER	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
BRITISH COLUMBIA	91.5%	96.2%	89.0%	97.3%	88.2%	94.8%
KELOWNA	95.7%	100.0%	90.7%	100.0%	100.0%	100.0%
CAMPBELL RIVER/COURTNAY	84.5%	100.0%	70.8%	91.7%	87.1%	88.9%
VANCOUVER CMA	91.8%	95.5%	90.7%	97.5%	87.6%	94.8%
VANCOUVER 1	93.3%	97.2%	92.0%	94.9%	89.0%	100.0%
VANCOUVER 2	93.5%	100.0%	90.0%	100.0%	92.3%	90.9%
VANCOUVER 3	98.6%	95.5%	98.5%	100.0%	98.4%	100.0%
VANCOUVER 4	70.2%	60.0%	71.4%	91.7%	64.6%	72.7%

N/A indicates that the class of trade is not represented within the respective region.

Vancouver 1: Vancouver, Richmond

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

1.2.4 Regional Results by Gender of Minor (Table 11)

Males went into 29 of the 30 cities and females went into 27 of the 30 cities. The data shows that, in aggregate across the country, girls have a higher compliance level, and underage girls are likely to be refused a cigarette purchase more often than underage boys. In cities where both boys and girls attempted to buy cigarettes, 20 of the cities had a higher rate of compliance for teen boys whereas 10 had a higher rate of compliance for girls. The data also shows that this year's higher national compliance rate is the result of a significant increase in both genders' compliance levels with the girls surpassing the boys.

Among twenty-six cities where both girls and boys tried to buy cigarettes, retailers in seventeen cities were more likely to refuse a sale to boys than girls, and those in nine cities were more likely to refuse girls than boys.

We can trace this year's higher national compliance rate to increases in compliance among retailers dealing with underage boys, up from 64.4% in 2003 to 81.3% in 2004. For girls, the increase was less but still significant, up 12.2% from 71.0% in 2003 to 83.2% in 2004.

The most significant and influencing factor in the increase this year is directly related to the improved performance in Québec as illustrated below:

	2004/Girls	2003/Girls	2004/Boys	2003/Boys
QUEBEC	80.5%	41.1%	72.3%	32.4%
CHICOUTIMI/JONQUIERE	90.9%	56.6%	91.7%	97.2%
MONTREAL	74.9%	37.3%	59.1%	28.0%
QUEBEC CITY	77.2%	57.3%	78.8%	42.2%
SHERBROOKE	98.0%	5.3%	76.4%	43.0%

Other cities with impressive increases (double-digits) in overall compliance are: Regina (20.0%), Bathurst (18.5%), Charlottetown (17.1%) and Sydney (11.5%).

The results by gender for all the cities in the sample are in Table 11.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 11 – Weighted – Sales to Minors Compliance Results by City/Province/Region
% Retailers Unwilling to Sell by Gender of Minor – 2004

Region	% Unwilling to Sell (compliant) All Teens	% Unwilling to Sell (compliant) When Teen Was: Male	% Unwilling to Sell (compliant) When Teen Was: Female
NATIONAL	82.3%	81.3%	83.2%
NATIONAL (CORE)	81.9%	80.3%	83.4%
ST. JOHNS	70.3%	68.0%	72.4%
CHARLOTTETOWN	91.9%	97.7%	86.0%
NEW BRUNSWICK	72.6%	78.9%	64.8%
NEW BRUNSWICK CORE	67.2%	73.3%	58.8%
BATHURST	97.2%	97.2%	N/A
FREDERICTON	75.7%	83.8%	67.6%
MONCTON	86.8%	97.2%	77.5%
SAINT JOHN	48.4%	44.2%	52.1%
NOVA SCOTIA	79.3%	81.7%	76.8%
HALIFAX	71.8%	76.4%	67.2%
SYDNEY	93.8%	92.1%	95.4%
QUEBEC	76.5%	72.3%	80.5%
CHICOUTIMI/JONQUIERE	91.3%	91.7%	90.9%
MONTREAL	67.0%	59.1%	74.9%
QUEBEC CITY	78.0%	78.8%	77.2%
SHERBROOKE	86.8%	76.4%	98.0%
ONTARIO	83.9%	84.2%	83.6%
ONTARIO CORE	83.7%	83.0%	84.2%
KINGSTON	93.8%	92.3%	95.2%
OTTAWA	95.8%	96.3%	95.3%
ST. CATHARINES	81.5%	84.1%	78.9%
SUDBURY	80.0%	92.0%	69.1%
THUNDER BAY	84.0%	89.7%	77.8%
TORONTO	75.0%	70.4%	79.6%
WINDSOR	91.8%	92.3%	91.4%
MANITOBA	64.5%	45.2%	80.9%
BRANDON	66.7%	N/A	66.7%
WINNIPEG	64.2%	45.2%	84.7%
SASKATCHEWAN	76.5%	66.7%	88.8%
REGINA	93.0%	98.5%	86.9%
SASKATOON	64.4%	45.5%	90.4%
ALBERTA	91.8%	96.1%	87.8%
ALBERTA CORE	91.3%	95.6%	87.8%
CALGARY	91.7%	92.7%	90.3%
EDMONTON	89.6%	100.0%	86.2%
MEDICINE HAT	98.4%	98.4%	N/A
RED DEER	100.0%	100.0%	N/A
BRITISH COLUMBIA	91.5%	92.8%	90.2%
KELOWNA	95.7%	97.9%	93.2%
CAMPBELL RIVER/COURTN	84.5%	88.1%	81.0%
VANCOUVER CMA	91.8%	92.7%	90.9%
VANCOUVER 1	93.3%	88.4%	98.3%
VANCOUVER 2	93.5%	93.3%	93.7%
VANCOUVER 3	98.6%	99.1%	98.2%
VANCOUVER 4	70.2%	87.8%	54.5%

N/A = Not Applicable to that study period - year or city

Vancouver 1: Vancouver, Richmond

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

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

1.2.5 Regional Results by Gender of Clerk (Table 12)

Nationally we found that female clerks were somewhat more likely than male clerks to refuse a tobacco sale to minors, similar to last year (80.5% vs. 83.8%). At the regional level, the differences based on clerk gender are less pronounced.

In eight of the thirty cities visited, any measured difference in compliance rates between male and female clerks fell within the range of statistical tolerance (at the ninety-five percent confidence level) and was not statistically significant.

Of the twenty cities where the difference was great enough to be significant, women proved more likely than men to refuse a sale in sixteen of them.

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

Region	Male Clerk Compliance	Female Clerk Compliance
St. John's	61.7%	74.1%
Québec City	71.7%	81.6%
Kingston	88.6%	100%
Sudbury	72.7%	83.3%
Brandon	59.1%	76.5%
Regina	87.2%	98.5%
Calgary	86.5%	96.2%
Kelowna	89.3%	98.4%
Campbell River/Courtney	78.9%	86.2%
Sherbrooke	92.3%	86.0%

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

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 12 – Weighted – Sales to Minors Compliance Results by City/Province/Region
% Retailers Unwilling to Sell by Gender of Clerk – 2004

Region	% Unwilling to Sell (compliant) All Stores	% Unwilling to Sell (compliant) When Clerk is: Male	% Unwilling to Sell (compliant) When Clerk is: Female
NATIONAL	82.3%	80.5%	83.8%
NATIONAL (CORE)	81.9%	80.3%	83.3%
ST. JOHNS	70.3%	61.7%	74.1%
CHARLOTTETOWN	91.9%	88.9%	94.0%
NEW BRUNSWICK	72.6%	73.5%	72.0%
NEW BRUNSWICK CORE	67.2%	69.5%	65.5%
BATHURST	97.2%	100.0%	95.5%
FREDERICTON	75.7%	75.0%	76.2%
MONCTON	86.8%	83.9%	88.9%
SAINT JOHN	48.4%	52.8%	45.5%
NOVA SCOTIA	79.3%	78.8%	79.8%
HALIFAX	71.8%	73.6%	69.0%
SYDNEY	93.8%	92.7%	94.5%
QUEBEC	76.5%	75.0%	77.6%
CHICOUTIMI/JONQUIERE	91.3%	88.3%	93.9%
MONTREAL	67.0%	70.4%	63.5%
QUEBEC CITY	78.0%	71.7%	81.6%
SHERBROOKE	86.8%	92.3%	85.0%
ONTARIO	83.9%	83.4%	84.5%
ONTARIO CORE	83.7%	83.7%	83.4%
KINGSTON	93.8%	88.6%	100.0%
OTTAWA	95.8%	96.0%	95.2%
ST. CATHARINES	81.5%	77.8%	83.6%
SUDBURY	80.0%	72.7%	83.3%
THUNDER BAY	84.0%	84.4%	83.7%
TORONTO	75.0%	73.7%	76.4%
WINDSOR	91.8%	89.9%	95.0%
MANITOBA	64.5%	61.0%	67.8%
BRANDON	66.7%	59.1%	76.5%
WINNIPEG	64.2%	61.3%	66.9%
SASKATCHEWAN	76.5%	74.2%	79.0%
REGINA	93.0%	87.3%	98.5%
SASKATOON	64.4%	65.6%	62.8%
ALBERTA	91.8%	88.9%	94.1%
ALBERTA CORE	91.3%	88.5%	93.7%
CALGARY	91.7%	86.5%	96.2%
EDMONTON	89.6%	89.3%	89.9%
MEDICINE HAT	98.4%	100.0%	97.9%
RED DEER	100.0%	100.0%	100.0%
BRITISH COLUMBIA	91.5%	88.9%	93.7%
KELOWNA	95.7%	89.3%	98.4%
CAMPBELL RIVER/COURTNAY	84.5%	78.9%	86.2%
VANCOUVER CMA	91.8%	89.3%	94.1%
VANCOUVER 1	93.3%	90.2%	97.2%
VANCOUVER 2	93.5%	91.5%	95.4%
VANCOUVER 3	98.6%	97.9%	99.2%
VANCOUVER 4	70.2%	65.3%	74.5%

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1.2.6 Regional Results by Proximity to School &/or Mall (Table 13)

Similar to last year, the results are not convincing about the impact that stores within the vicinity of schools and malls has on the compliancy levels. Compliancy levels in stores within the vicinity of schools and malls and those elsewhere flank the national average with only a marginal difference. This year's results are in the reverse order of last year's with compliancy levels higher in stores near schools or malls than the national average (lower last year) and compliancy levels lower in stores elsewhere than the national average (higher last year). All compliancy levels are higher this year than last which is in keeping with the increased national average.

In six of the thirty cities (20%) the difference in compliance based on proximity was between $\pm 2\%$ indicating a small variance between compliance levels. However in seven cities (23%) a disparity of greater than 10% and less than -10% exists indicating a large margin in only a few cities. Only one city (3.3%) has a disparity of greater than 15% or less than -15%. All in all, there is a small compliancy margin between stores selling tobacco near schools and or malls and those elsewhere.

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

- St. John's
- Fredericton
- Saint John
- Halifax
- Windsor
- Winnipeg
- Saskatoon

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Table 13 – Weighted – Sales to Minors Compliance Results by City/Province/Region
% Retailers Unwilling to Sell by Proximity to School and/or Mall – 2004

	% 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	82.3%	83.4%	81.2%
NATIONAL (CORE)	81.9%	83.3%	80.6%
ST. JOHNS	70.3%	69.0%	70.6%
CHARLOTTETOWN	91.9%	93.5%	90.9%
NEW BRUNSWICK	72.6%	77.2%	69.3%
NEW BRUNSWICK CORE	67.2%	73.9%	63.6%
BATHURST	97.2%	94.1%	100.0%
FREDERICTON	75.7%	73.3%	77.3%
MONCTON	86.8%	82.2%	93.5%
SAINT JOHN	48.4%	59.1%	44.9%
NOVA SCOTIA	79.3%	76.2%	80.9%
HALIFAX	71.8%	63.8%	74.9%
SYDNEY	93.8%	90.2%	97.0%
QUEBEC	76.5%	77.4%	75.7%
CHICOUTIMI/JONQUIERE	91.3%	88.9%	91.9%
MONTREAL	67.0%	73.0%	61.3%
QUEBEC CITY	78.0%	76.9%	79.4%
SHERBROOKE	86.8%	92.3%	83.6%
ONTARIO	83.9%	86.1%	81.8%
ONTARIO CORE	83.7%	86.9%	80.3%
KINGSTON	93.8%	94.0%	93.5%
OTTAWA	95.8%	96.8%	93.3%
ST. CATHARINES	81.5%	80.2%	82.3%
SUDBURY	80.0%	88.4%	74.2%
THUNDER BAY	84.0%	78.8%	88.1%
TORONTO	75.0%	79.0%	70.5%
WINDSOR	91.8%	92.6%	91.7%
MANITOBA	64.5%	63.5%	65.6%
BRANDON	66.7%	76.5%	59.1%
WINNIPEG	64.2%	62.1%	66.7%
SASKATCHEWAN	76.5%	80.0%	65.3%
REGINA	93.0%	92.9%	93.3%
SASKATOON	64.4%	67.5%	57.9%
ALBERTA	91.8%	90.9%	92.8%
ALBERTA CORE	91.3%	90.4%	92.4%
CALGARY	91.7%	95.5%	87.6%
EDMONTON	89.6%	85.1%	95.8%
MEDICINE HAT	98.4%	95.2%	100.0%
RED DEER	100.0%	100.0%	100.0%
BRITISH COLUMBIA	91.5%	92.8%	90.4%
KELOWNA	95.7%	95.2%	96.0%
CAMPBELL RIVER/COURTNAY	84.5%	88.0%	79.4%
VANCOUVER CMA	91.8%	93.1%	90.6%
VANCOUVER 1	93.3%	93.0%	93.5%
VANCOUVER 2	93.5%	93.4%	93.7%
VANCOUVER 3	98.6%	98.9%	98.4%
VANCOUVER 4	70.2%	78.9%	65.2%

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

1.2.7 Regional Results by Presence or Not of Adults in Store (Table 14)

Underage teens who attempted to buy cigarettes in stores in the presence of adults were slightly more likely to be refused a sale than when no adults were present.

Regionally, the presence of adults in store correlates with significantly higher rates of retailer compliance in twenty-two of all cities visited. In the other eight cities, compliance was either lower when adults were present, or no measurable difference was evident based on the presence or not of adults at the time of the attempted purchase.

Results across cities and aggregated to the level of their respect province or region show that compliance scored higher in the presence of adults everywhere including Québec where the opposite was true last year.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 14 – Weighted – Sales to Minors Compliance Results by City/Province/Region
% Retailers Unwilling to Sell Based on Presence of Adult Customers in Store – 2004

Region	% Unwilling to Sell (compliant) All Stores	% Unwilling to Sell (compliant): Stores With Adult Customers	% Unwilling to Sell (compliant): Stores Without Adult Customers
NATIONAL	82.3%	85.0%	78.1%
NATIONAL CORE	81.9%	84.9%	77.1%
ST. JOHNS	70.3%	80.8%	53.3%
CHARLOTTETOWN	91.9%	91.7%	92.3%
NEW BRUNSWICK	72.6%	80.2%	66.2%
NEW BRUNSWICK CORE	67.2%	78.8%	59.5%
BATHURST	97.2%	96.2%	100.0%
FREDERICTON	75.7%	77.3%	73.3%
MONCTON	86.8%	82.6%	93.3%
SAINT JOHN	48.4%	40.0%	49.4%
NOVA SCOTIA	79.3%	81.3%	76.6%
HALIFAX	71.8%	75.0%	67.6%
SYDNEY	93.8%	94.2%	93.2%
QUEBEC	76.5%	77.5%	74.8%
CHICOUTIMI/JONQUIERE	91.3%	94.9%	85.1%
MONTREAL	67.0%	66.3%	68.6%
QUEBEC CITY	78.0%	79.2%	76.2%
SHERBROOKE	86.8%	93.7%	76.7%
ONTARIO	83.9%	86.3%	81.1%
ONTARIO CORE	83.7%	86.6%	79.5%
KINGSTON	93.8%	96.3%	92.6%
OTTAWA	95.8%	95.8%	95.7%
ST. CATHARINES	81.5%	80.0%	82.9%
SUDBURY	80.0%	90.5%	64.3%
THUNDER BAY	84.0%	94.1%	75.6%
TORONTO	75.0%	78.7%	68.8%
WINDSOR	91.8%	97.1%	87.9%
MANITOBA	64.5%	72.1%	49.1%
BRANDON	66.7%	80.0%	42.9%
WINNIPEG	64.2%	71.1%	50.0%
SASKATCHEWAN	76.5%	80.3%	69.2%
REGINA	93.0%	98.9%	79.5%
SASKATOON	64.4%	65.1%	63.1%
ALBERTA	91.8%	93.6%	88.0%
ALBERTA CORE	91.3%	93.2%	87.4%
CALGARY	91.7%	95.7%	83.9%
EDMONTON	89.6%	90.0%	88.9%
MEDICINE HAT	98.4%	97.7%	100.0%
RED DEER	100.0%	100.0%	100.0%
BRITISH COLUMBIA	91.5%	92.5%	89.9%
KELOWNA	95.7%	95.9%	94.7%
CAMPBELL RIVER/COURTNAY	84.5%	85.1%	83.8%
VANCOUVER CMA	91.8%	92.7%	90.4%
VANCOUVER 1	93.3%	95.3%	91.2%
VANCOUVER 2	93.5%	94.6%	91.9%
VANCOUVER 3	98.6%	99.3%	97.4%
VANCOUVER 4	70.2%	67.2%	73.9%

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

1.3 Results by Presence of Operation ID Signs

This is the third year that this survey of retailer compliance with tobacco sales-to-minors legislation identified stores with and without "Operation ID" point-of-sale displays. 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 pre-empt further legislative encroachment on the right of private retailers to sell tobacco. Concerned about possibly tighter government restrictions on tobacco retail sales, the program seeks to help retailers deal with minors who want to buy tobacco⁸.

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

Participating Retailers

We found fewer retailers this year than last participating in "Operation ID". Less than half (43.7%) of the 5,516 establishments visited for this year's survey indicated program participation compared with 45.2% the year before. The drop in participation levels can be attributed to the drop in those cities having the greatest weight on the overall performance of the country, namely Toronto and Montreal. These cities dropped by -11.0% and -9.9% respectively. In all, twenty cities dropped in participation levels and only ten cities increased. The cities showing the highest increases from 2003 vis à vis participation in "Operation ID" are: Chicoutimi/Jonquière (74.3%), Charlottetown (71.6%), Medicine Hat (53.5%), Saint John (52.4%), Saskatoon (29.7%), Sydney (28.2%), and Ottawa (10.5%) (Table 15).

This said, some degree of support for "Operation ID" was found in every city we visited. This includes Regina and Saskatoon, where Saskatchewan's tobacco law previously prohibited the posting of tobacco-related signs other than those specifically mandated by tobacco laws in that province in 2003. On average, just over twenty five percent of retailers in these cities appeared to support the program. Last year there were just fewer than five percent.

⁸ The mission statement of the Coalition can be found at the *Operation ID* website: <http://operationid.com/kit-howtoletter.html>

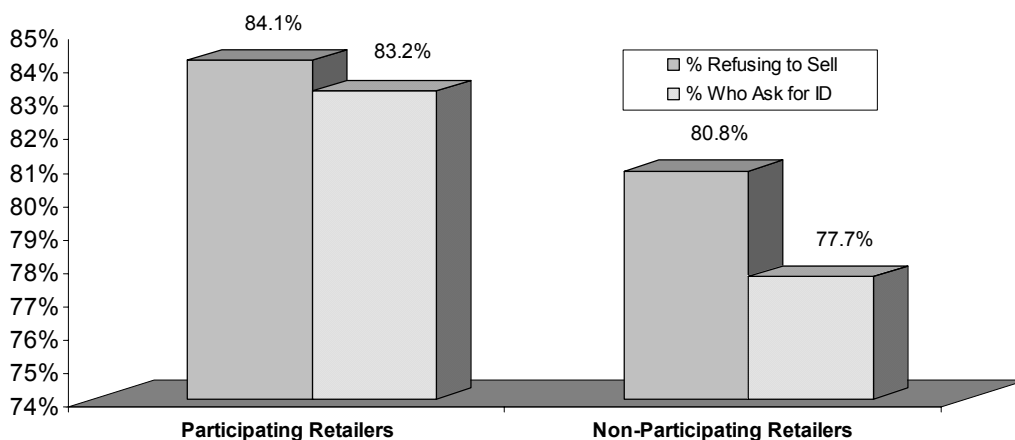
Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Overall Sales-to-Minors Compliance Rates

This section deals with retailer compliance with respect to tobacco sales-to-minors based on whether or not their establishment indicated support for the "Operation ID" program. On a national level, the fact that retailers split about evenly between those with and without "Operation ID" signs permits reliable comparisons to be made about 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.

At the national level (Table 16), retailers participating in "Operation ID" were slightly more likely than those not participating to refuse a tobacco sale to minors, but the difference is not statistically significant. Participating retailers registered compliance of 84.1% up from 71.1% last year compared with 80.8% up from 65.2% last year for non-participating retailers⁹. Compliance levels are up in non-participating stores because of the overall increase in compliance levels this year over last year. The respective levels of compliance in each group correlate directly with the percentage of retailers asking for ID. These findings are consistent with those of a year ago, though the compliance rate for retailers in both cases are higher than those recorded in 2003¹⁰, as explained earlier because of the overall increase in compliance levels:

Chart 9 – Weighted – National – 2004 Sales-to-Minors Compliance Based on Retailer Participation in Operation ID



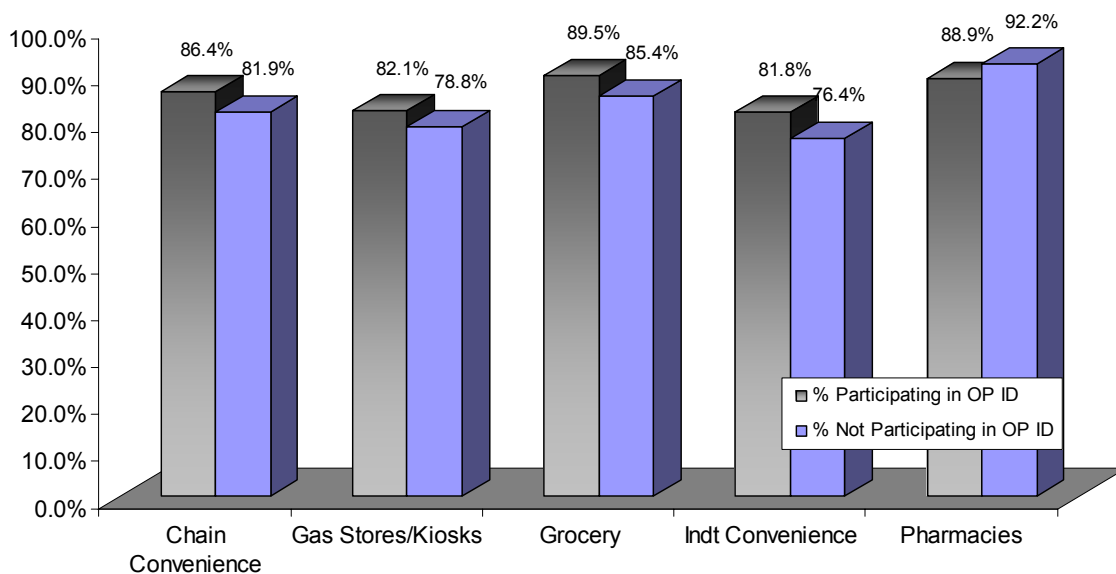
⁹ Statistically, given the sample sizes involved and the compliance rate, any difference nationally of 1.6 percentage point in either direction (up or down) suggests there is a high probability that the difference in compliance between participating and non-participating retailers is meaningful.

¹⁰ The corresponding figures for 2003 are 71.1% compliance for retailers participating in "Operation ID" compared with 65.2% for those not participating. *Final Report of Findings 2003: Evaluation of Retailers Behaviour Towards Certain Youth Access-to-Tobacco Restrictions*, ACNielsen 2003

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Statistical differences that were marginal in the rate of retailer compliance based on "Operation ID" support were found in all trade channels. Pharmacies reported a higher level of compliance when not participating in Operation ID than when participating in Operation ID. Nationally, in all classes of trade except pharmacies, teens were more likely to be refused a sale if the establishment participated in "Operation ID" than if it didn't. Like last year, the refusal rate amongst pharmacies was high regardless of their level of participation in Operation ID.

Chart 10 – Weighted – National – 2004 Sales-to-Minors Compliance Based on Retailer Participation in Operation ID by Class of Trade



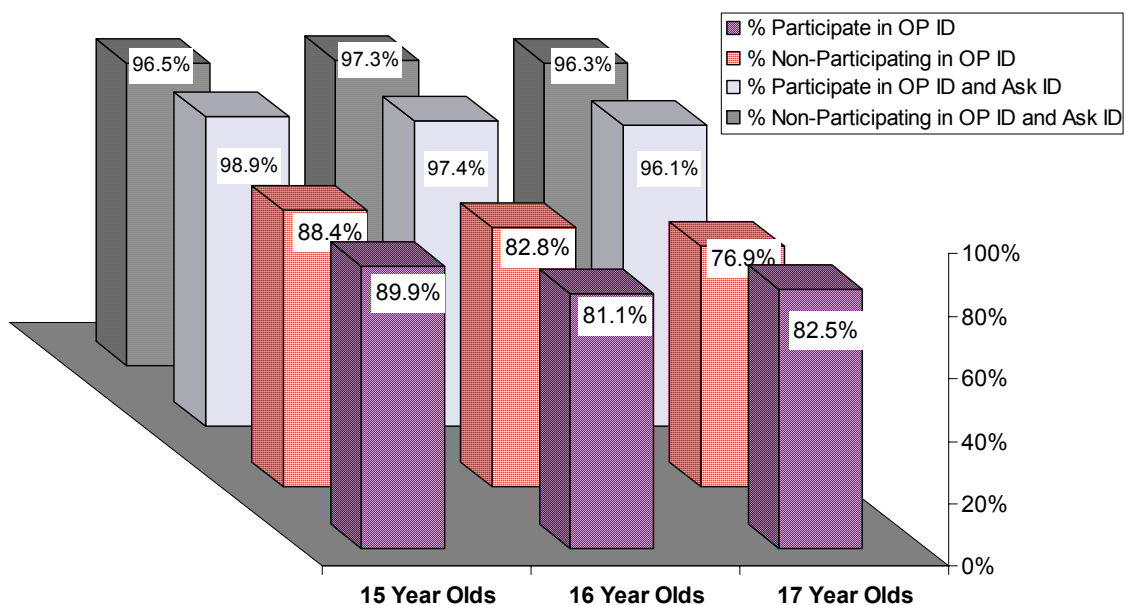
Nationally the difference in compliance levels between participating and non-participating stores indicated a non-statistical significance with a margin of only 3.3%. Of the thirty cities we visited, we were able to draw comparisons between stores participating and those not participating in "Operation ID" in twenty-nine of them. (In Sydney every store we visited carried an "Operation ID" sign, so no comparison is possible.) Of the twenty-nine cities, the difference in compliance recorded between participating and non-participating retailers was deemed large enough to be significant only in sixteen cities (55%). Of these sixteen cities, participating retailers in only four of them refused a sale more often than non-participating ones (compliance is higher in non-participating than in participating stores). In the other twelve cities, the opposite was true. In short, significant positive differences attributable to participation in "Operation ID" are found in twelve of twenty-nine cities (41%).

Higher sales-to-minors compliance involving minors of all ages coincides directly with retailer willingness to ask for proper ID. Retailers participating in the "Operation ID" program were more likely than non-participating retailers to ask for proof of age.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

However, participation in the program did not result in uniform demand for age identification across age groups, or in more uniform rates of compliance between groups. Whether or not retailers endorsed "Operation ID", older teens had an easier time attempting to buy cigarettes than younger ones did (Chart 11). This finding is consistent with results in 2003.

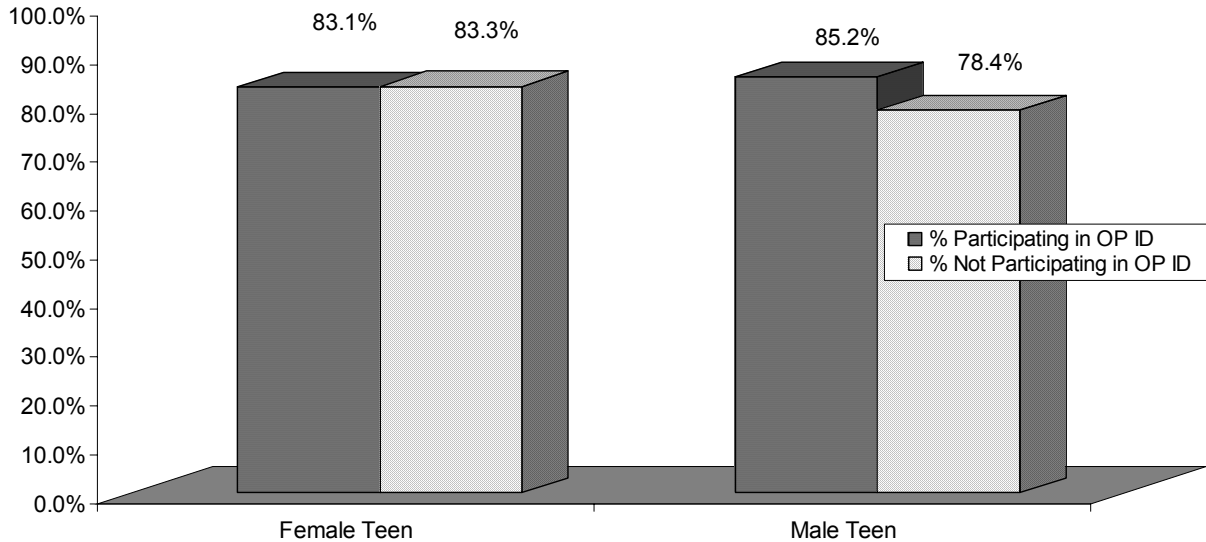
Chart 11 – Weighted – National – 2004 Sales-to-Minors Compliance by Age of Teen Based on Retailer Participation in Operation ID



Non-participating retailers were slightly more likely to refuse a sale to young girls than to young boys, while participating retailers were slightly more likely to refuse young boys. Regardless of teen gender, compliance was slightly higher among retailers participating in "Operation ID" than those not participating. The level of participation in "Operation ID" seems to have little effect on the retailers' compliance levels in sales to female minors.

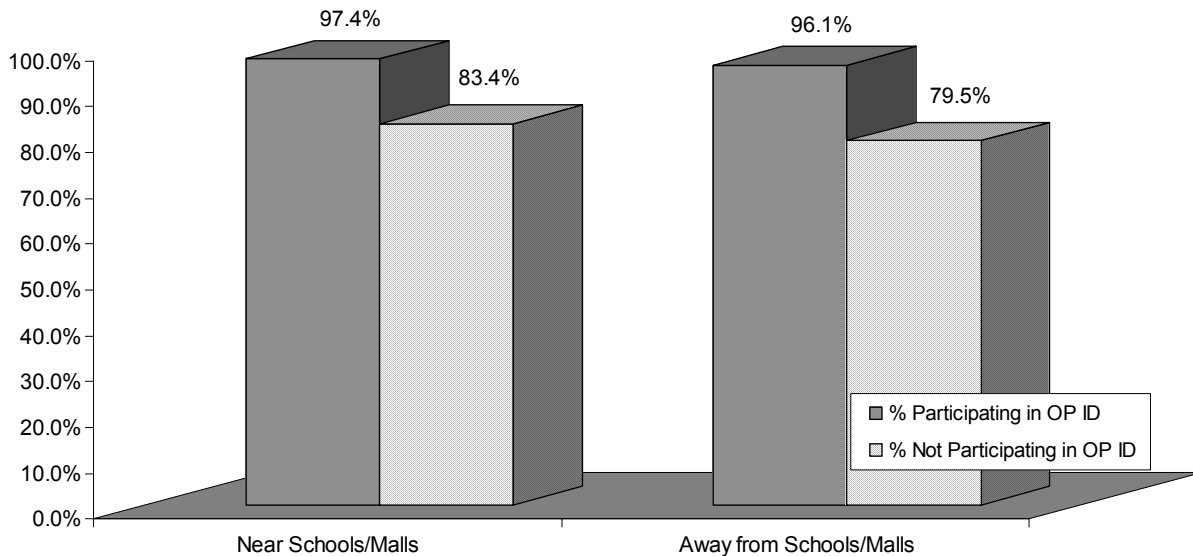
Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Chart 12 – Weighted – National – 2004 Sales-to-Minors Compliance by Gender of Teen Based on Retailer Participation in Operation ID



Retailers participating in "Operation ID" were more likely to refuse a sale than non-participants regardless of the proximity of stores to schools or malls. This finding is consistent with results in 2003.

Chart 13 – Weighted – National – 2004 Sales-to-Minors Compliance Based on Proximity to Schools/Malls & Retailer Participation in Operation ID



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The current data suggest that "Operation ID" may be having a positive effect on tobacco retailer behaviour in a handful of markets in Canada. A significant increase in participation was found in six of the thirty cities: Charlottetown (71.6%), Saint John (52.4%), Sydney (28.2%), Chicoutimi/Jonquière (74.3%), Saskatoon (29.7%) and Medicine Hat (53.5%) (Table 15). It is noteworthy that of these six cities where participation increased, national compliance levels also increased from 2003 in four of the cities: Charlottetown, Sydney, Chicoutimi/Jonquière and Medicine Hat. The increase was found to be statistically significant in all of these cities except Medicine Hat, where the increase was marginal.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 15 – Raw – Operation ID Retailer Participation Rates by City/Province/Region 2004 vs. 2003 Comparison

	Participated in Operation ID in 2004			Participated in Operation ID in 2003			Participation Rate Difference 2004 vs 2003
	# Sample Stores Participating in Operation ID (Raw)	Total # Stores In Sample (Raw)	Participation % of Sample	# Sample Stores Participating in Operation ID (Raw)	Total # Stores In Sample (Raw)	Participation % of Sample	
NATIONAL	2409	5516	43.7%	2,462	5,452	45.2%	-1.5%
NATIONAL (CORE)	2184	5013	43.6%	2,189	4,955	44.2%	-0.6%
ST. JOHNS	136	195	69.7%	176	191	92.1%	-22.4%
CHARLOTTETOWN	70	86	81.4%	8	82	9.8%	71.6%
NEW BRUNSWICK	190	277	68.6%	173	282	61.3%	7.2%
NEW BRUNSWICK CORE	150	201	74.6%	134	207	64.7%	9.9%
BATHURST	13	36	36.1%	24	34	70.6%	-34.5%
FREDERICTON	51	74	68.9%	70	78	89.7%	-20.8%
MONCTON	40	76	52.6%	39	75	52.0%	0.6%
SAINT JOHN	86	91	94.5%	40	95	42.1%	52.4%
NOVA SCOTIA	212	376	56.4%	180	366	49.2%	7.2%
HALIFAX	84	248	33.9%	91	242	37.6%	-3.7%
SYDNEY	128	128	100.0%	89	124	71.8%	28.2%
QUEBEC	350	923	37.9%	381	915	41.6%	-3.7%
CHICOUTIMI/JONQUIERE	104	126	82.5%	10	121	8.3%	74.3%
MONTREAL	79	364	21.7%	115	364	31.6%	-9.9%
QUEBEC CITY	135	327	41.3%	163	327	49.8%	-8.6%
SHERBROOKE	32	106	30.2%	93	103	90.3%	-60.1%
ONTARIO	512	1273	40.2%	587	1,251	46.9%	-6.7%
ONTARIO CORE	347	890	39.0%	386	869	44.4%	-5.4%
KINGSTON	40	81	49.4%	41	78	52.6%	-3.2%
OTTAWA	86	214	40.2%	62	209	29.7%	10.5%
ST. CATHARINES	63	227	27.8%	89	231	38.5%	-10.8%
SUDBURY	22	105	21.0%	48	106	45.3%	-24.3%
THUNDER BAY	62	75	82.7%	71	73	97.3%	-14.6%
TORONTO	151	412	36.7%	195	409	47.7%	-11.0%
WINDSOR	88	159	55.3%	81	145	55.9%	-0.5%
MANITOBA	134	338	39.6%	205	322	63.7%	-24.0%
BRANDON	15	39	38.5%	17	36	47.2%	-8.8%
WINNIPEG	119	299	39.8%	188	286	65.7%	-25.9%
SASKATCHEWAN	76	302	25.2%	14	315	4.4%	20.7%
REGINA	15	128	11.7%	5	148	3.4%	8.3%
SASKATOON	61	174	35.1%	9	167	5.4%	29.7%
ALBERTA	351	793	44.3%	366	787	46.5%	-2.2%
ALBERTA CORE	331	749	44.2%	333	747	44.6%	-0.4%
CALGARY	137	348	39.4%	173	347	49.9%	-10.5%
EDMONTON	132	337	39.2%	134	340	39.4%	-0.2%
MEDICINE HAT	62	64	96.9%	26	60	43.3%	53.5%
RED DEER	20	44	45.5%	33	40	82.5%	-37.0%
BRITISH COLUMBIA	378	953	39.7%	372	941	39.5%	0.1%
KELOWNA	55	92	59.8%	93	93	100.0%	-40.2%
CAMPBELL RIVER/COURTNAY	31	84	36.9%	35	77	45.5%	-8.5%
VANCOUVER CMA	292	777	37.6%	244	771	31.6%	5.9%
VANCOUVER 1	73	240	30.4%	83	234	35.5%	-5.1%
VANCOUVER 2	63	215	29.3%	58	210	27.6%	1.7%
VANCOUVER 3	107	218	49.1%	68	214	31.8%	17.3%
VANCOUVER 4	49	104	47.1%	35	113	31.0%	16.1%

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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 16 – Weighted – Sales-to-Minors Compliance Results by City/Province/Region Based on Retailer Participation in Operation ID – 2004

	All Stores	Retailer Sales-To-Minors Compliance Stores Not Participating in Operation ID	Retailer Sales-To-Minors Compliance in Stores Participating in Operation ID	Compliance Point Difference	Likely That Change is Statistically Significant (Yes/No)
NATIONAL	82.3%	80.8%	84.1%	3.3%	No
NATIONAL (CORE)	81.9%	80.5%	83.6%	3.1%	No
ST. JOHNS	70.3%	76.3%	67.6%	-8.6%	Yes
CHARLOTTETOWN	91.9%	81.3%	94.3%	13.0%	Yes
NEW BRUNSWICK	72.6%	87.4%	65.8%	-21.6%	Yes
NEW BRUNSWICK CORE	67.2%	86.3%	60.7%	-25.6%	Yes
BATHURST	97.2%	95.7%	100.0%	4.3%	No
FREDERICTON	75.7%	87.0%	70.6%	-16.4%	Yes
MONCTON	86.8%	88.9%	85.0%	-3.9%	No
SAINT JOHN	48.4%	40.0%	48.8%	8.8%	Yes
NOVA SCOTIA	79.3%	68.9%	87.3%	18.4%	Yes
HALIFAX	71.8%	68.9%	77.4%	8.5%	Yes
SYDNEY	93.8%	0.0%	93.8%	0.0%	0
QUEBEC	76.5%	72.1%	83.7%	11.6%	Yes
CHICOUTIMI/JONQUIERE	91.3%	86.4%	92.3%	5.9%	Yes
MONTREAL	67.0%	66.0%	70.9%	4.9%	No
QUEBEC CITY	78.0%	74.5%	83.0%	8.5%	Yes
SHERBROOKE	86.8%	85.1%	90.6%	5.5%	Yes
ONTARIO	83.9%	82.4%	86.1%	3.7%	No
ONTARIO CORE	83.6%	82.9%	84.7%	1.9%	No
KINGSTON	93.8%	95.1%	92.5%	-2.6%	No
OTTAWA	95.8%	93.0%	100.0%	7.0%	Yes
ST. CATHARINES	81.5%	77.4%	92.1%	14.6%	Yes
SUDBURY	80.0%	80.7%	77.3%	-3.5%	No
THUNDER BAY	84.0%	84.6%	83.9%	-0.7%	No
TORONTO	75.0%	76.2%	72.8%	-3.4%	No
WINDSOR	91.8%	91.5%	92.0%	0.5%	No
MANITOBA	64.5%	62.3%	67.9%	5.7%	Yes
BRANDON	66.7%	66.7%	66.7%	0.0%	No
WINNIPEG	64.2%	61.7%	68.1%	6.4%	Yes
SASKATCHEWAN	76.5%	73.5%	85.5%	12.1%	Yes
REGINA	93.0%	93.8%	86.7%	-7.1%	Yes
SASKATOON	64.4%	53.1%	85.2%	32.1%	Yes
ALBERTA	91.8%	92.1%	91.5%	-0.6%	No
ALBERTA CORE	91.3%	91.6%	90.9%	-0.7%	No
CALGARY	91.7%	89.6%	94.9%	5.3%	Yes
EDMONTON	89.6%	93.7%	83.3%	-10.3%	Yes
MEDICINE HAT	98.4%	100.0%	98.4%	-1.6%	No
RED DEER	100.0%	100.0%	100.0%	0.0%	No
BRITISH COLUMBIA	91.5%	91.1%	92.1%	0.9%	No
KELOWNA	95.7%	97.3%	94.5%	-2.8%	No
CAMPBELL RIVER/COURTNAY	84.5%	77.4%	96.8%	19.4%	Yes
VANCOUVER CMA	91.8%	92.2%	91.1%	-1.1%	No
VANCOUVER 1	93.3%	93.4%	93.2%	-0.3%	No
VANCOUVER 2	93.5%	93.4%	93.7%	0.2%	No
VANCOUVER 3	98.6%	99.1%	98.1%	-1.0%	No
VANCOUVER 4	70.2%	70.9%	69.4%	-1.5%	No

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

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SECTION 2.0 - 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.

The federal mandatory sign requirements are the same in 2004 as they were for the previous survey; however requirements may be different in some provinces, from those of measurements conducted in 2003, which would be a result of legislative changes made since the last survey.

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 Quebec, Manitoba and Alberta, where federal law prevails, 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 not concerned 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. In Saskatchewan, unlike the 2003 survey, retailers were not considered non-compliant if signs were posted other than those mandated by law. This is due to the Saskatchewan Court of Appeal's ruling, in October 2003, which struck down certain

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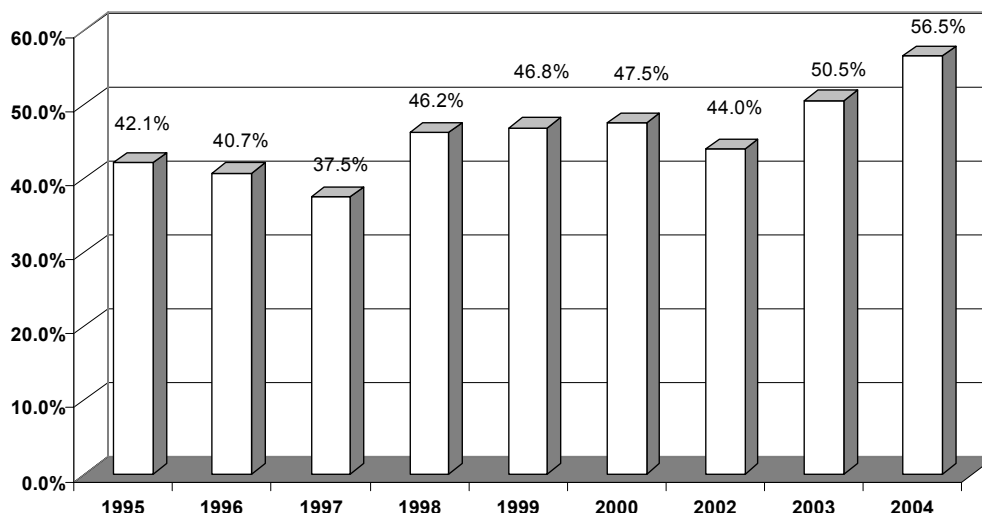
provisions which ban the display of tobacco products and signs on any premises accessible to minors.

2.1 Overall Compliance - National

Nationally, the percentage of retailers complying fully with the sign provisions of the tobacco laws was 56.5%. This figure represents the weighted percentage of retailers across all thirty cities visited that met every sign compliance condition we measured.

The current level is the highest it has been since the start of national measurements in 1995. The historical trend reveals an upward move in the compliance levels with a slight levelling off in 1997 and 2002.

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



**Note: Sign laws have changed over the years and results may be perfectly comparable from one year to the next. Caution should be exercised when analysing results for comparative purposes.*

The figures in the chart above reflect the national percentage of retailers who post every mandatory sign at every designated location on their premises, as prescribed under federal or provincial laws. In New Brunswick, for example, there are as many as three mandatory signs requiring posting. 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. The greater the number of individual requirements a retailer must satisfy with respect to the sign provisions of the Tobacco Act or provincial

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

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.

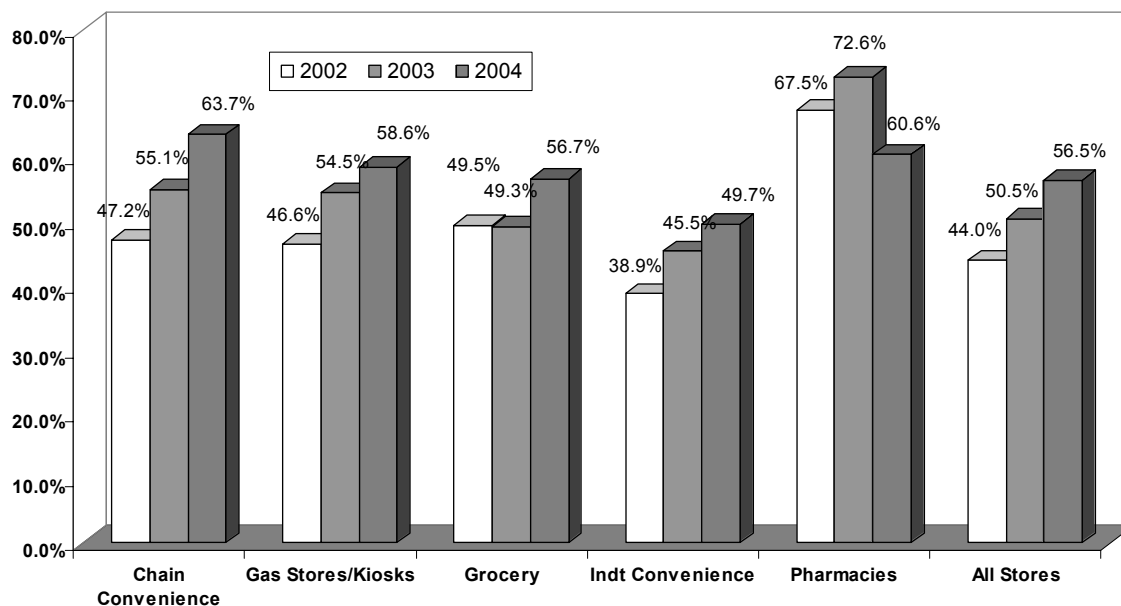
2.2 Compliance by Class of Trade (Table 17)

The improvement in overall compliance with the tobacco sign laws stems from better sign compliance this year than last across chain convenience stores and grocery stores.

The largest change over last year was in regards to pharmacies where a 60.6% compliance level was reported down from last year's 72.6%. The other trades were just marginally off from last year.

The increase in chain convenience and grocery stores was high enough to offset the larger drop in pharmacies.

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



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

- chain convenience bettered the national average by 7.2% with sixteen of the thirty cities also surpassing the national average. The provinces with the heaviest weight on national scores, Ontario and Québec, were also above the national average however they were lower than all other provinces;

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- gas station/kiosks slightly passed the national average with a sign compliance level of 58.6%. All provinces except Ontario and Québec bettered the national average. Fifteen of the thirty cities also scored above the national average;
- grocery stores slightly bettered the national average with a sign compliance level of 56.7%. Fourteen of the thirty cities scored above the national average with all cities in Ontario scoring below the national average;
- independent convenience stores were the lowest sign compliance trade with only 49.7%, with only fourteen out of the thirty cities scoring above the national levels. All but two cities in Ontario and all but one city in Québec scored below the national level;
- pharmacies, although lower than last year, are still one of the top performers in sign compliance with 60.6%. Since only thirteen cities actually had pharmacies selling tobacco products, these results are slightly skewed. Only five of the thirteen cities were below the national level with the majority surpassing it.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 17 – Weighted – Full Sign Compliance by Class of Trade % Retailers Posting All Signs in All Places as Required – 2004

	All Stores	Chain Convenience	Gas Station/Kiosks	Grocery	Ind't Convenience	Pharmacies
NATIONAL	56.5%	63.7%	58.6%	56.7%	49.7%	60.6%
NATIONAL (CORE)	56.1%	62.0%	58.0%	58.2%	48.8%	61.7%
ST. JOHNS	25.6%	5.9%	34.1%	25.0%	27.8%	15.0%
CHARLOTTETOWN	51.2%	54.5%	44.0%	88.9%	41.9%	60.0%
NEW BRUNSWICK	66.1%	69.0%	60.6%	55.0%	69.4%	0.0%
NEW BRUNSWICK CORE	72.6%	81.3%	61.7%	66.7%	76.4%	0.0%
BATHURST	30.6%	0.0%	23.1%	0.0%	40.0%	0.0%
FREDERICTON	79.7%	100.0%	73.7%	80.0%	79.1%	0.0%
MONCTON	48.7%	53.8%	58.3%	20.0%	44.1%	0.0%
SAINT JOHN	83.5%	66.7%	80.0%	85.7%	86.7%	0.0%
NOVA SCOTIA	59.8%	59.5%	70.9%	81.8%	52.2%	0.0%
HALIFAX	42.7%	50.0%	55.4%	63.6%	33.8%	0.0%
SYDNEY	93.0%	83.3%	97.4%	100.0%	91.0%	0.0%
QUEBEC	49.9%	53.8%	49.4%	59.8%	42.3%	0.0%
CHICOUTIMI/JONQUIERE	23.0%	16.7%	19.4%	23.5%	25.8%	0.0%
MONTREAL	42.0%	44.9%	37.2%	51.7%	33.7%	0.0%
QUEBEC CITY	63.3%	67.9%	70.5%	79.7%	47.6%	0.0%
SHERBROOKE	67.9%	83.3%	63.3%	57.1%	68.2%	0.0%
ONTARIO	46.8%	58.2%	52.0%	30.0%	41.7%	0.0%
ONTARIO CORE	38.5%	48.4%	46.2%	29.3%	28.8%	0.0%
KINGSTON	12.3%	11.1%	19.0%	0.0%	12.1%	0.0%
OTTAWA	18.7%	23.5%	30.8%	6.7%	9.4%	0.0%
ST. CATHARINES	80.2%	93.1%	81.5%	45.0%	76.5%	0.0%
SUDBURY	32.4%	40.0%	28.6%	37.5%	30.8%	0.0%
THUNDER BAY	81.3%	92.9%	71.4%	50.0%	89.7%	0.0%
TORONTO	43.9%	48.0%	58.8%	36.9%	32.4%	0.0%
WINDSOR	55.3%	76.5%	53.3%	40.0%	39.6%	0.0%
MANITOBA	71.0%	70.5%	82.4%	67.8%	64.2%	65.2%
BRANDON	87.2%	100.0%	88.2%	85.7%	77.8%	100.0%
WINNIPEG	68.9%	68.4%	81.1%	65.4%	62.5%	63.6%
SASKATCHEWAN	62.6%	65.9%	71.6%	50.0%	54.5%	56.6%
REGINA	54.7%	60.0%	54.9%	66.7%	56.0%	35.3%
SASKATOON	68.4%	70.8%	84.6%	36.8%	53.3%	66.7%
ALBERTA	68.1%	80.6%	65.4%	80.5%	56.8%	56.4%
ALBERTA CORE	70.2%	81.1%	65.5%	82.9%	61.5%	59.3%
CALGARY	75.0%	81.1%	72.7%	83.3%	68.1%	70.3%
EDMONTON	78.0%	85.9%	80.0%	89.7%	72.9%	57.6%
MEDICINE HAT	3.1%	0.0%	0.0%	14.3%	5.6%	0.0%
RED DEER	31.8%	66.7%	63.6%	20.0%	7.7%	11.1%
BRITISH COLUMBIA	61.7%	73.3%	57.3%	66.7%	54.8%	73.9%
KELOWNA	72.8%	75.0%	65.1%	87.5%	75.0%	77.8%
CAMPBELL RIVER/COURTNAY	45.2%	62.5%	45.8%	50.0%	38.7%	44.4%
VANCOUVER CMA	62.2%	74.2%	57.0%	65.5%	55.4%	76.3%
VANCOUVER 1	62.9%	83.3%	50.0%	71.8%	52.4%	75.8%
VANCOUVER 2	69.8%	84.6%	67.1%	68.8%	61.5%	86.4%
VANCOUVER 3	55.5%	50.0%	57.6%	55.6%	44.4%	77.4%
VANCOUVER 4	58.7%	60.0%	42.9%	66.7%	66.7%	54.5%

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

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2.3 Overall Compliance by Region

Higher sign compliance rates nationally are the result of increases over the 2003 study in thirteen cities visited. The straight average of the increase across all thirteen cities is 21.1 points. The largest and most significant increases (i.e., double-digit increases) occurred in seven cities, where the straight average of the jump is 33.7 points. These cities are:

- Sydney (+51.8 points)
- Saint John (+ 48.2 points)
- Toronto (+ 42.0 points)
- Thunder Bay (+ 27.7 points)
- Brandon (+ 27.5 points)
- Saskatoon (+22.6 points)
- Halifax (+ 16.3 points)

These communities represent several provinces and are legislated under a variety of tobacco laws. In cities from provinces where the law requires only one tobacco sign be posted in the appropriate locations, higher compliance is the result of more retailers than last year posting the appropriate sign in all areas designated. This would be the case for cities in Quebec, Manitoba and Alberta. In the other cities, more than one official sign is mandated by their respective provincial law. Typically, the majority of retailers in these cities carry at least one of the mandatory signs. In 2004, cities in Manitoba report better compliance than in 2003.

In seventeen of thirty cities, sign compliance rates decreased. The straight average of the decrease across all seventeen cities is 38.2 points, but the largest drop occurred in fourteen of the cities (double digits). These cities are:

- Medicine Hat (-91.8 points)
- Kingston (-81.7 points)
- Red Deer (-64.6 points)
- Ottawa (-62.4 points)
- Charlottetown (-47.2 points)
- St. John's (-46.2 points)
- Moncton (-43.1 points)
- Bathurst (-43.0 points)
- Chicoutimi/Jonquière (-40.0%)
- Campbell River/Courtney (-35.2 points)
- Sudbury (-20.8 points)
- Kelowna (-20.5 points)
- Vancouver (-17.8 points)
- Sherbrooke (-11.9 points)

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Lowest compliance was found in sixteen cities where the percentage of stores in full compliance was below the national average (56.5%):

- Regina (54.7%)
- Windsor (55.3%)
- Charlottetown (51.2%)
- Moncton (48.7%)
- Campbell River/Courtney (45.2%)
- Toronto (43.9%)
- Halifax (42.7%)
- Montreal (42.0%)
- Sudbury (32.4%)
- Red Deer (31.8%)
- Bathurst (30.6%)
- St. John's (25.6%)
- Chicoutimi/Jonquière (23.0%)
- Ottawa (18.7%)
- Kingston (12.3%)
- Medicine Hat (3.1%)

Many of the cities are from provinces where tobacco law requires more of retailers than the posting of a single mandatory sign. In Ontario, for example, the law requires that three different signs be posted. The poor showing in Kingston, Ottawa and Sudbury is directly attributable to retailers in this city routinely posting only two of the three necessary signs, failing mostly to post the "No Smoking" sign also demanded by the law. In Alberta, where the federal law prevails and signs must be posted in both official languages, Medicine Hat and Red Deer received low compliance scores for not having the signs in both official languages. Likewise, in Québec, Chicoutimi/Jonquière and Montreal also received low scores.

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

- Sydney (93.0%)
- Brandon (87.2%)
- Saint John (83.5%)
- Thunder Bay (81.3%)
- St. Catharines (80.2%)

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 18 – Weighted – % Retailer Sign Compliance by Region All Store Types – 2004 vs. 2003 Results

	2003 Results	2004 Results	Net Change
NATIONAL	50.5%	56.5%	6.0%
NATIONAL (CORE)	48.9%	56.1%	7.2%
ST. JOHNS	71.8%	25.6%	-46.2%
CHARLOTTETOWN	98.4%	51.2%	-47.2%
NEW BRUNSWICK	66.1%	66.1%	0.0%
NEW BRUNSWICK CORE	53.4%	72.6%	19.2%
BATHURST	73.6%	30.6%	-43.0%
FREDERICTON	71.5%	79.7%	8.2%
MONCTON	91.8%	48.7%	-43.1%
SAINT JOHN	35.3%	83.5%	48.2%
NOVA SCOTIA	30.8%	59.8%	29.0%
HALIFAX	26.4%	42.7%	16.3%
SYDNEY	41.2%	93.0%	51.8%
QUEBEC	54.8%	49.9%	-4.9%
CHICOUTIMI/JONQUIERE	63.0%	23.0%	-40.0%
MONTREAL	51.5%	42.0%	-9.5%
QUEBEC CITY	63.1%	63.3%	0.2%
SHERBROOKE	79.8%	67.9%	-11.9%
ONTARIO	23.5%	46.8%	23.3%
ONTARIO CORE	16.8%	38.5%	21.7%
KINGSTON	94.0%	12.3%	-81.7%
OTTAWA	81.1%	18.7%	-62.4%
ST. CATHARINES	73.7%	80.2%	6.5%
SUDBURY	53.2%	32.4%	-20.8%
THUNDER BAY	53.6%	81.3%	27.7%
TORONTO	1.9%	43.9%	42.0%
WINDSOR	47.8%	55.3%	7.5%
MANITOBA	60.9%	71.0%	10.1%
BRANDON	59.7%	87.2%	27.5%
WINNIPEG	61.0%	68.9%	7.9%
SASKATCHEWAN	46.4%	62.6%	16.2%
REGINA	47.1%	54.7%	7.6%
SASKATOON	45.8%	68.4%	22.6%
ALBERTA	84.5%	68.1%	-16.4%
ALBERTA CORE	83.9%	70.2%	-13.7%
CALGARY	84.0%	75.0%	-9.0%
EDMONTON	82.7%	78.0%	-4.7%
MEDICINE HAT	94.9%	3.1%	-91.8%
RED DEER	96.4%	31.8%	-64.6%
BRITISH COLUMBIA	80.9%	61.7%	-19.2%
KELOWNA	93.3%	72.8%	-20.5%
CAMPBELL RIVER/COURTNAY	80.4%	45.2%	-35.2%
VANCOUVER CMA	80.0%	62.2%	-17.8%
VANCOUVER 1	81.2%	62.9%	-18.3%
VANCOUVER 2	83.9%	69.8%	-14.1%
VANCOUVER 3	76.3%	55.5%	-20.8%
VANCOUVER 4	72.4%	58.7%	-13.7%

Vancouver 1: Vancouver, Richmond

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Vancouver 4: North Vancouver, West Vancouver

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2.4 Sign Compliance by Provincial Legislative Component (Table 19)

Table 19 shows retailer compliance by each individual sign component for signs mandated under the *Tobacco Act* or corresponding provincial legislation.

Seventeen of the thirty cities visited (57%) achieved a sign compliance of 50% or better with the following cities ranking in the top 5:

- Sydney 93.0%
- Brandon 87.2%
- Saint John 83.5%
- Thunder Bay 81.3%
- St. Catharines 80.2%

Regionally, the provinces and cities where sign compliance is low are typically those where one or another version of the required age restriction signs are posted, but where retailers fail to post these signs equally in all the prescribed places, or where they are less disciplined in posting ancillary signs. The situation in 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. This is especially true in the province's largest city, Toronto. Because of this oversight there, full compliance with the tobacco sign laws across Ontario as a whole is the lowest in the country.

In Saskatchewan, the province's tobacco law prohibits the posting of signs other than those expressly allowed. Mandatory signs are the two issued by the province. In addition to these, but not in place of them, the federal age restriction sign designated under the *Tobacco Act* is also allowed. In all, more than half of Saskatchewan retailers (62.6%) met the new sign requirement in its entirety. This figure is an improvement from last year (46.4%).

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 19 – Weighted – Retailer Compliance with Mandatory Tobacco Sign Provisions – 2004

How To Interpret This Table

The figures in the column labelled *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. The figures in the other columns show the percentage of retailers properly posting the sign indicated at the top of the column. "N/A" indicates that the sign indicated does not apply to the respective region.

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	% Stores with signs in both languages	Full Compliance	Sign saying "You may smoke here"
NATIONAL	63.2%	7.0%	18.7%	42.7%	15.6%	4.2%	5.5%	27.6%	56.5%	0.3%
NATIONAL (CORE)	61.5%	7.7%	19.1%	39.3%	10.6%	3.4%	6.1%	27.5%	56.1%	0.1%
ST. JOHNS	25.6%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	25.6%	N/A
CHARLOTTETOWN	62.8%	73.3%	N/A	84.9%	N/A	N/A	N/A	N/A	51.2%	N/A
NEW BRUNSWICK	83.8%	N/A	97.1%	80.1%	N/A	84.1%	N/A	56.3%	66.1%	N/A
NEW BRUNSWICK Core	88.6%	N/A	97.0%	85.6%	N/A	85.6%	N/A	45.3%	72.6%	N/A
BATHURST	63.9%	N/A	94.4%	72.2%	N/A	52.8%	N/A	25.0%	30.6%	N/A
FREDERICTON	87.8%	N/A	97.3%	83.8%	N/A	91.9%	N/A	91.9%	79.7%	N/A
MONCTON	71.1%	N/A	97.4%	65.8%	N/A	80.3%	N/A	85.5%	48.7%	N/A
SAINT JOHN	98.9%	N/A	97.8%	92.3%	N/A	93.4%	N/A	15.4%	83.5%	N/A
NOVA SCOTIA	0.0%	85.6%	N/A	N/A	N/A	N/A	81.1%	N/A	59.8%	N/A
HALIFAX	0.0%	78.2%	N/A	N/A	N/A	N/A	72.2%	N/A	42.7%	N/A
SYDNEY	0.0%	100.0%	N/A	N/A	N/A	N/A	98.4%	N/A	93.0%	N/A
QUEBEC	49.8%	N/A	N/A	N/A	N/A	N/A	N/A	43.6%	49.9%	N/A
CHICOUTIMI/JONQUIERE	24.6%	N/A	N/A	N/A	N/A	N/A	N/A	31.7%	23.0%	N/A
MONTREAL	39.3%	N/A	N/A	N/A	N/A	N/A	N/A	31.9%	42.0%	N/A
QUEBEC CITY	67.0%	N/A	N/A	N/A	N/A	N/A	N/A	53.2%	63.3%	N/A
SHERBROOKE	63.2%	N/A	N/A	N/A	N/A	N/A	N/A	67.9%	67.9%	N/A
ONTARIO	82.1%	N/A	N/A	84.1%	67.4%	N/A	N/A	8.2%	46.8%	1.3%
ONTARIO CORE	80.1%	N/A	N/A	82.6%	59.9%	N/A	N/A	5.2%	38.5%	0.6%
KINGSTON	86.4%	N/A	N/A	84.0%	58.0%	N/A	N/A	N/A	12.3%	N/A
OTTAWA	77.1%	N/A	N/A	93.9%	54.2%	N/A	N/A	14.5%	18.7%	N/A
ST. CATHARINES	85.0%	N/A	N/A	87.7%	90.7%	N/A	N/A	11.5%	80.2%	4.4%
SUDBURY	77.1%	N/A	N/A	75.2%	56.2%	N/A	N/A	6.7%	32.4%	N/A
THUNDER BAY	92.0%	N/A	N/A	92.0%	96.0%	N/A	N/A	44.0%	81.3%	1.3%
TORONTO	80.6%	N/A	N/A	81.1%	59.2%	N/A	N/A	1.5%	43.9%	0.7%
WINDSOR	84.9%	N/A	N/A	76.1%	71.7%	N/A	N/A	1.3%	55.3%	1.3%
MANITOBA	78.1%	N/A	N/A	N/A	N/A	N/A	N/A	75.4%	71.0%	N/A
BRANDON	89.7%	N/A	N/A	N/A	N/A	N/A	N/A	97.4%	87.2%	N/A
WINNIPEG	76.6%	N/A	N/A	N/A	N/A	N/A	N/A	72.6%	68.9%	N/A
SASKATCHEWAN	71.9%	N/A	N/A	67.2%	N/A	N/A	N/A	N/A	62.6%	N/A
REGINA	59.4%	N/A	N/A	28.9%	N/A	N/A	N/A	N/A	54.7%	N/A
SASKATOON	81.0%	N/A	N/A	95.4%	N/A	N/A	N/A	N/A	68.4%	N/A
ALBERTA	78.3%	N/A	N/A	N/A	N/A	N/A	N/A	76.2%	68.1%	N/A
ALBERTA CORE	80.9%	N/A	N/A	N/A	N/A	N/A	N/A	77.8%	70.2%	N/A
CALGARY	79.6%	N/A	N/A	N/A	N/A	N/A	N/A	78.7%	75.0%	N/A
EDMONTON	78.9%	N/A	N/A	N/A	N/A	N/A	N/A	91.1%	78.0%	N/A
MEDICINE HAT	98.4%	N/A	N/A	N/A	N/A	N/A	N/A	3.1%	3.1%	N/A
RED DEER	34.1%	N/A	N/A	N/A	N/A	N/A	N/A	47.7%	31.8%	N/A
BRITISH COLUMBIA	79.5%	N/A	80.2%	82.5%	N/A	N/A	N/A	N/A	61.7%	N/A
KELOWNA	89.1%	N/A	78.3%	89.1%	N/A	N/A	N/A	N/A	72.8%	N/A
CAMPBELL RIVER/COURTNEY	52.4%	N/A	67.9%	90.5%	N/A	N/A	N/A	N/A	45.2%	N/A
VANCOUVER CMA	81.3%	N/A	81.7%	80.8%	N/A	N/A	N/A	N/A	62.2%	N/A
VANCOUVER 1	84.2%	N/A	79.6%	82.1%	N/A	N/A	N/A	N/A	62.9%	N/A
VANCOUVER 2	85.1%	N/A	86.5%	88.4%	N/A	N/A	N/A	N/A	69.8%	N/A
VANCOUVER 3	79.4%	N/A	80.7%	74.8%	N/A	N/A	N/A	N/A	55.5%	N/A
VANCOUVER 4	71.2%	N/A	78.8%	75.0%	N/A	N/A	N/A	N/A	58.7%	N/A

N/A indicates that the sign is not applicable to the respective region.

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

Part B Tobacco Advertisements at Point of Sale

For this year's study, the distribution of tobacco advertising at point of sale measurements was 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 merchandise¹¹; 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 the fourth 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.

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.

¹¹ 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.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

SECTION 1.0 - General Trends in Tobacco POS Advertising

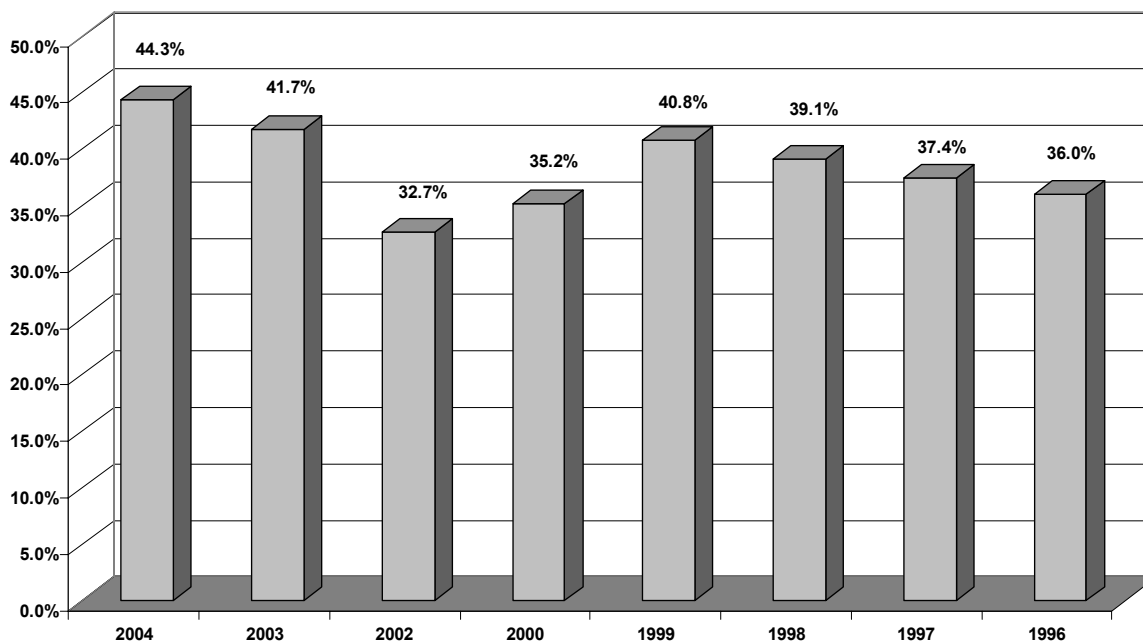
1.1. Distribution of Point-Of-Sale (POS) Advertising

The distribution and availability of tobacco-related POS material rose in the past year to a new high. This year's increase is consistent with a trend that began last year with increasing evidence of POS material.

Nationally, no single piece of POS advertising material was found in more than one quarter of all stores. Among specific forms of POS ads, counter-top displays remain the single-most predominant ad form available in the largest percentage of stores (24.2%) down from last year's 33.0%. Following the ban on tobacco sponsorship advertising, after the 1999 result, tobacco companies realigned their in-store merchandising vehicles. The traditional predominance of posters was replaced by the shift to counter-top displays. The new trend of POS signs looks as if the reduction of the counter-top-displays is being offset with an equal distribution and increase of the other sign types, danglers, shelf-talkers, and posters.

The presence of all other signs not including counter-top-displays has more than doubled from last year with the largest increase in shelf-talkers from 4.2% to 19.3%.

Chart 16 – Weighted – National % of All Stores with Tobacco Ads



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Table 20 – Weighted – National (All Stores) % of Stores with Point-of-Sale Advertising by Type of Ad

	1996	1997	1998	1999	2000	2002	2003	2004
All Ad Types	36.0%	37.4%	39.1%	40.8%	35.2%	32.7%	41.7%	44.3%
Danglers	1.2%	1.6%	0.4%	2.8%	0.5%	0.7%	5.7%	10.2%
Shelf-Talkers	12.5%	1.7%	1.2%	1.4%	1.8%	3.1%	4.2%	19.3%
Posters	16.6%	14.0%	12.5%	14.9%	4.2%	1.2%	2.4%	12.4%
Counter -Top Displays	13.6%	17.0%	19.8%	17.4%	26.6%	28.0%	33.0%	24.2%
Other Ad Types	14.8%	16.1%	18.6%	19.2%	10.3%	2.5%	7.4%	4.8%

In comparison with findings in 2003 the distribution of tobacco ads was measurably higher in fifteen of the thirty cities visited. Pronounced increases in distribution were noted in many cities across most provinces.

The cities where tobacco ad distribution increased the most are listed in Table 21. In the majority of these cities, distribution jumped by more than fifty percent this year. All in all, retail stores in more cities have ads this year than last and the overall level of distribution is higher. In 2003, stores in eight cities had distribution below twenty-percent. In the current study, stores in only five cities reported distribution of twenty-percent or less.

Table 21 – Weighted – All Stores Changes in Point-of-Sale Ad Distribution Across Regions – 2004 vs. 2003 Results % of Stores with Ads

Cities Where Tobacco Ad Distribution Increased The Most	2003	2004	Diff 2004 vs 2003
Moncton	0.0%	71.1%	71.1%
Halifax	1.5%	66.9%	65.4%
Brandon	0.0%	64.1%	64.1%
Saint John	0.0%	58.2%	58.2%
Saskatoon	0.0%	56.9%	56.9%
Regina	3.6%	50.8%	47.2%
Thunder Bay	1.1%	45.3%	44.2%
Chicoutimi/Jonquiere	24.1%	66.7%	42.6%
Sydney	46.0%	84.4%	38.4%
Bathurst	24.4%	58.3%	33.9%
Ottawa	52.3%	73.4%	21.1%
St. Catharines	43.3%	63.0%	19.7%
Campbell River/Courtney	0.0%	17.9%	17.9%

The cities where tobacco ad distribution was the highest (i.e., above the national average) follow in Table 22. The list includes several cities in which ad distribution increased substantially this year over last:

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 22 – Weighted – All Stores Point-of-Sale Ad Distribution Across Regions – 2004 – vs. 2003 Results % of Stores with Ads

Cities Where Tobacco Ad Distribution Highest This Year	2003	2004	Diff 2004 vs 2003
SYDNEY	46.0%	84.4%	38.4%
OTTAWA	52.3%	73.4%	21.1%
MONCTON	0.0%	71.1%	71.1%
SHERBROOKE	54.7%	69.8%	15.1%
HALIFAX	1.5%	66.9%	65.4%
CHICOUTIMI/JONQUIERE	24.1%	66.7%	42.6%
FREDERICTON	50.4%	66.2%	15.8%
BRANDON	0.0%	64.1%	64.1%
ST. CATHARINES	43.3%	63.0%	19.7%
ST. JOHNS	51.1%	60.0%	8.9%
BATHURST	24.4%	58.3%	33.9%
SAINT JOHN	0.0%	58.2%	58.2%
SASKATOON	0.0%	56.9%	56.9%
WINNIPEG	43.5%	55.9%	12.4%

Last year, retail establishments in five of thirty cities surveyed had no ads whatsoever, while this year all cities had POS advertising signs. Only one city had below two percent of the stores with ads. A handful of cities experienced double-digit decreases in ad distribution. These are Quebec City, Medicine Hat, Kelowna, Windsor, and Edmonton. The drop in Quebec City puts this city on the list of those with fewest ads in distribution. Distribution in the other two cities remained above twenty-percent.

Tobacco ad distribution was lowest (less than 10.0%) in those areas shown in Table 23:

Table 23 – Weighted – All Stores Changes in Point-of-Sale Ad Distribution Across Regions – 2004 vs. 2003 Results % of Stores with Ads

Cities Where Tobacco Ad Distribution Weakest This Year	2003	2004	Diff 2004 vs 2003
KELOWNA	40.1%	1.1%	-39.0%
CHARLOTTETOWN	1.2%	4.7%	3.5%
MEDICINE HAT	58.4%	9.4%	-49.0%

1.2. POS Ad Share & Number of Ads per Store by Type

POS Ad Share by Type

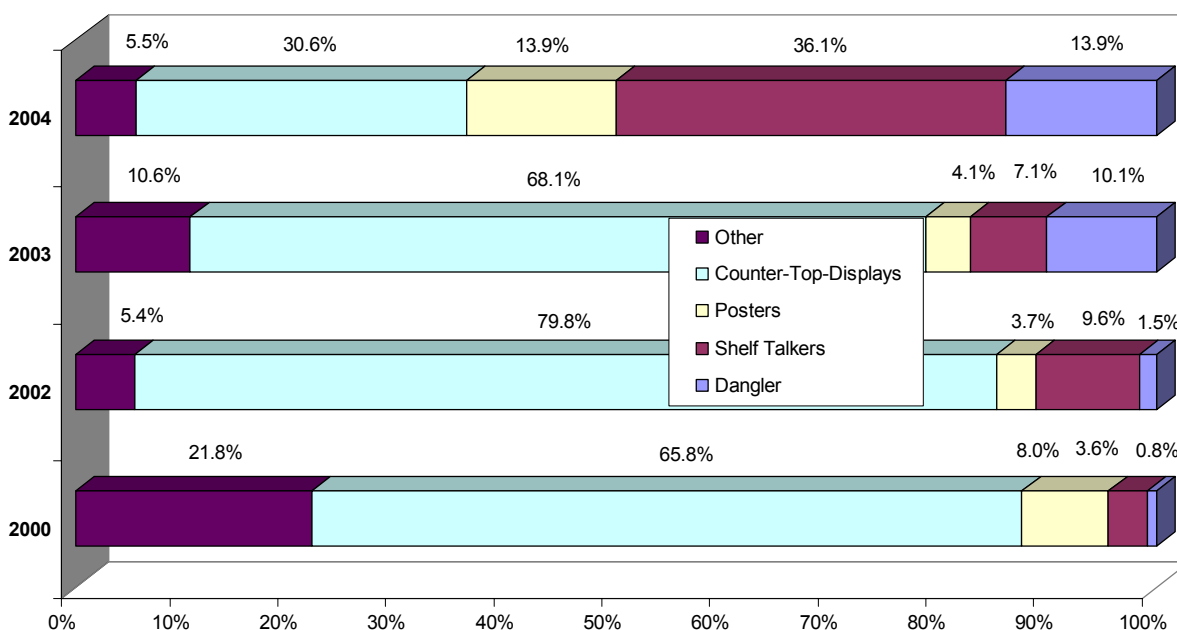
Nationally, shelf talkers account for the majority of the tobacco POS materials at retail. These POS materials make up more than one-third (36.1%) of the ad forms, significantly up from last year (7.1%).

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

The drop in the share of counter-top displays is not the result of a decrease in these ads but rather an increase in the use of other ads namely shelf talkers. The trend the data represents is that there are more ads in stores and a better balanced distribution of the type of ads in stores.

Like last year, the current data suggest that the number of tobacco-related promotions at retail point-of-sale is on the rise again from 2003 (41.7%), following a year (2002 – 32.7%) when the distribution and number of tobacco ads appeared to have bottomed out.

Chart 17 – National (Weighted) Share of Ads by Type (2000 – 2004)



Statistics relative to share of POS ads are:

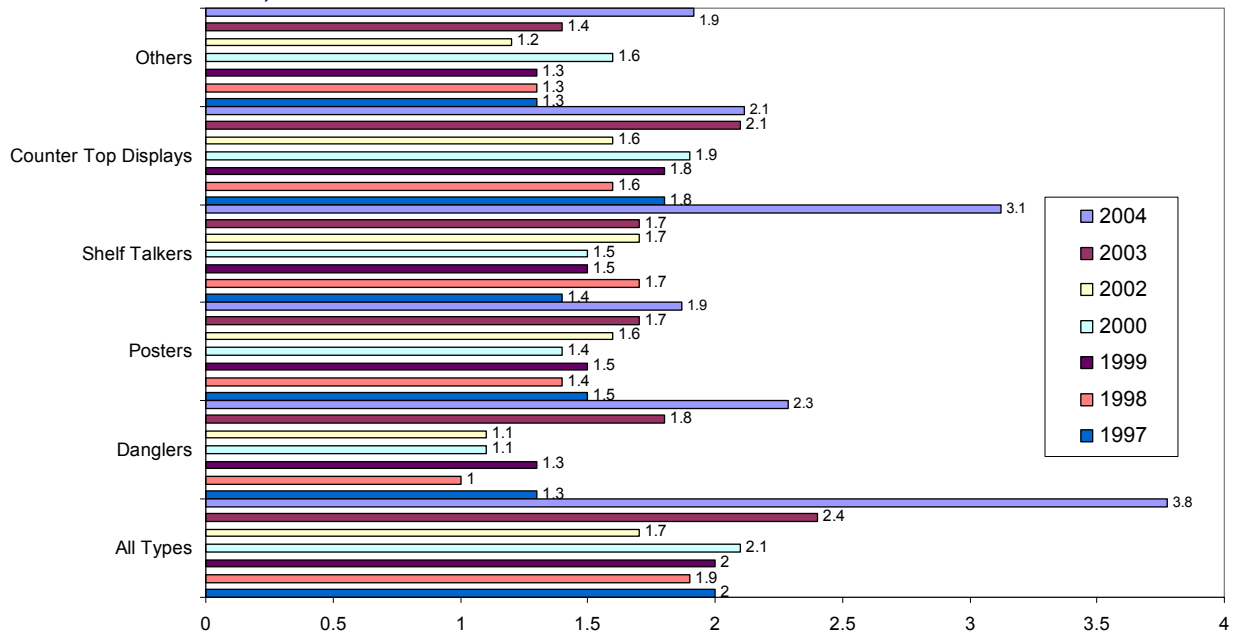
- 2 out of 3 signs on display in stores are counter top displays and shelf-talkers, a 66.7% representation, collectively;
- The cities with the highest distribution of ads are: Sydney, Ottawa, Moncton, Sherbrooke, and Halifax;
- in Ontario shelf-talkers represent the largest share of ads in stores with Kingston, Ottawa, and Windsor leading the pack;
- "other" forms of tobacco advertising were most popular in Kingston and also showing greater distribution across the country.

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Average Number of Ads by Type per Store

The average number of ads in stores with ads is 3.8, greater than last year at 2.4. Correspondingly, the average number of signs in stores has increased with the increase of stores carrying ads. There are more stores carrying ads and there is a more balanced distribution of sign types in stores.

Chart 18 – Weighted – Average No. of Tobacco POS Ads per Store Carrying – (1997-2004)



Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 24 – Weighted – Tobacco Point-of-Sale Ad Distribution & Share Summary – All Stores

Region	Total		Dangler		Poster		C/T Display		Shelf Talker		Other						
	Proj Dist %	Proj Avg	Proj Dist %	Share	Proj Dist %	Share	Proj Dist %	Share	Proj Dist %	Share	Proj Dist %	Share					
NATIONAL	44.3%	3.8	10.2%	13.9%	2.3	12.4%	13.9%	1.9	24.2%	30.6%	2.1	19.3%	36.1%	3.1	4.8%	5.5%	1.9
NATIONAL (CORE)	42.9%	3.3	8.0%	10.1%	1.4	12.9%	15.2%	1.8	24.7%	33.0%	2.0	18.8%	36.4%	2.7	4.3%	5.3%	1.6
ST. JOHNS	60.0%	4.0	24.6%	11.4%	1.1	0.5%	0.2%	1.0	42.1%	27.3%	1.6	52.8%	61.0%	2.8	0.0%	0.0%	0.0
CHARLOTTETOWN	4.7%	4.5	2.3%	44.4%	4.0	0.0%	0.0%	0.0	2.3%	50.0%	4.5	1.2%	5.6%	1.0	0.0%	0.0%	0.0
NEW BRUNSWICK	63.9%	3.8	17.7%	14.5%	2.0	27.1%	26.1%	2.3	17.3%	17.1%	2.4	35.0%	36.2%	2.5	8.7%	6.1%	1.7
NEW BRUNSWICK CORE	61.2%	3.7	21.9%	19.3%	2.0	36.3%	38.2%	2.4	10.4%	7.5%	1.6	36.3%	33.8%	2.1	2.0%	1.1%	1.3
BATHURST	58.3%	2.6	22.2%	21.8%	1.5	5.6%	7.3%	2.0	25.0%	25.5%	1.6	36.1%	43.6%	1.8	2.8%	1.8%	1.0
FREDERICTON	66.2%	2.7	1.4%	0.8%	1.0	44.6%	69.2%	2.7	13.5%	10.8%	1.4	23.0%	18.5%	1.4	1.4%	0.8%	1.0
MONCTON	71.1%	4.1	6.6%	4.6%	2.0	2.6%	0.9%	1.0	35.5%	37.0%	3.0	31.6%	41.1%	3.8	26.3%	16.4%	1.8
SAINT JOHN	58.2%	5.1	38.5%	27.8%	2.1	41.8%	29.6%	2.1	2.2%	2.2%	3.0	47.3%	39.3%	2.5	2.2%	1.1%	1.5
NOVA SCOTIA	72.9%	3.1	2.1%	1.3%	1.4	31.4%	24.6%	1.8	14.1%	13.7%	2.2	39.6%	60.0%	3.4	0.8%	0.4%	1.0
HALIFAX	66.9%	3.8	1.6%	0.8%	1.3	4.8%	2.7%	1.4	21.4%	18.2%	2.2	58.9%	78.1%	3.4	0.4%	0.2%	1.0
SYDNEY	84.4%	1.9	3.1%	2.9%	1.5	82.8%	90.9%	1.8	0.0%	0.0%	0.0	2.3%	5.3%	3.7	1.6%	1.0%	1.0
QUEBEC	36.4%	3.6	8.0%	9.8%	1.6	13.7%	21.0%	2.0	23.8%	44.2%	2.4	8.0%	22.8%	3.7	1.8%	2.3%	1.6
CHICOUTIMI/JONQUIERE	66.7%	2.3	30.2%	30.6%	1.6	8.7%	11.9%	2.1	42.9%	49.7%	1.8	7.1%	6.7%	1.4	1.6%	1.0%	1.0
MONTREAL	38.5%	3.2	8.5%	11.3%	1.6	18.1%	23.1%	1.5	21.7%	32.6%	1.8	9.6%	27.4%	3.5	4.1%	5.7%	1.7
QUEBEC CITY	11.6%	5.4	0.3%	0.5%	1.0	0.0%	0.0%	0.0	11.6%	93.1%	5.0	0.9%	6.4%	4.3	0.0%	0.0%	0.0
SHERBROOKE	69.8%	4.9	3.8%	2.2%	2.0	46.2%	35.2%	2.6	46.2%	27.7%	2.0	25.5%	34.9%	4.7	0.0%	0.0%	0.0
ONTARIO	47.9%	4.8	18.9%	26.7%	3.2	11.6%	9.5%	1.9	19.6%	15.5%	1.8	24.1%	36.8%	3.5	12.7%	11.5%	2.1
ONTARIO CORE	43.8%	5.0	10.3%	16.6%	3.5	12.7%	11.0%	1.9	22.1%	19.1%	1.9	24.0%	38.7%	3.5	15.1%	14.6%	2.1
KINGSTON	53.1%	5.9	6.2%	4.4%	2.2	9.9%	8.3%	2.6	21.0%	13.5%	2.0	37.0%	57.9%	4.9	24.7%	15.9%	2.0
OTTAWA	73.4%	6.7	7.0%	3.3%	2.3	1.9%	0.5%	1.3	51.4%	20.5%	2.0	48.1%	51.8%	5.3	52.8%	23.9%	2.2
ST. CATHARINES	63.0%	2.3	48.9%	71.5%	2.1	9.7%	10.3%	1.5	7.5%	6.1%	1.2	12.8%	9.7%	1.1	3.1%	2.4%	1.1
SUDBURY	38.1%	1.3	8.6%	19.2%	1.1	25.7%	69.2%	1.3	1.0%	1.9%	1.0	3.6%	7.7%	1.0	1.0%	1.9%	1.0
THUNDER BAY	45.3%	11.2	44.0%	54.3%	6.3	8.7%	2.4%	1.8	25.3%	6.6%	1.3	45.3%	38.5%	4.1	1.3%	0.3%	1.0
TORONTO	40.3%	4.8	13.8%	33.1%	4.6	19.7%	21.6%	2.1	19.7%	18.5%	1.8	22.3%	23.1%	2.0	4.6%	3.8%	1.8
WINDSOR	17.0%	1.6	6.9%	34.1%	1.4	0.8%	2.3%	1.0	3.1%	13.6%	1.2	9.4%	47.7%	1.4	0.6%	2.3%	1.0
MANITOBA	56.8%	3.3	11.8%	8.9%	1.4	16.9%	16.7%	1.9	45.6%	56.7%	2.4	8.9%	8.8%	1.9	8.6%	8.9%	2.0
BRANDON	84.1%	1.9	23.1%	18.8%	1.0	0.0%	0.0%	0.0	23.1%	18.8%	1.0	51.3%	56.3%	1.4	2.6%	6.3%	3.0
WINNIPEG	55.9%	3.5	10.4%	8.1%	1.5	19.1%	18.1%	1.9	48.5%	59.7%	2.4	3.3%	4.9%	2.9	9.4%	9.1%	1.9
SASKATCHEWAN	54.3%	5.4	4.6%	2.8%	1.8	12.6%	6.1%	1.4	44.0%	29.5%	2.0	39.7%	61.6%	4.6	0.0%	0.0%	0.0
REGINA	50.8%	5.7	0.0%	0.0%	0.0	4.7%	3.8%	2.3	26.6%	15.8%	1.7	32.0%	80.4%	7.2	0.0%	0.0%	0.0
SASKATOON	56.9%	5.2	8.0%	4.8%	1.8	18.4%	7.7%	1.3	56.9%	39.3%	2.1	45.4%	48.2%	3.2	0.0%	0.0%	0.0
ALBERTA	43.1%	3.2	6.1%	6.0%	1.4	11.1%	14.4%	1.8	32.8%	60.5%	2.5	13.1%	16.5%	1.7	2.3%	2.7%	1.6
ALBERTA CORE	42.9%	3.2	5.2%	5.0%	1.3	11.7%	15.2%	1.8	32.7%	61.0%	2.5	13.0%	15.9%	1.7	2.4%	2.9%	1.6
CALGARY	51.1%	2.5	4.3%	5.3%	1.6	8.3%	10.0%	1.6	39.9%	65.9%	2.1	15.5%	18.8%	1.6	0.0%	0.0%	0.0
EDMONTON	40.7%	4.1	6.8%	4.7%	1.1	17.2%	19.6%	1.9	31.2%	57.8%	3.1	11.3%	12.9%	1.9	5.0%	5.0%	1.6
MEDICINE HAT	9.4%	1.5	1.6%	11.1%	1.0	1.6%	11.1%	1.0	1.6%	11.1%	1.0	7.8%	55.6%	1.0	1.6%	11.1%	1.0
RED DEER	47.7%	3.0	20.5%	22.2%	1.6	0.0%	0.0%	0.0	34.1%	52.4%	2.2	15.9%	25.4%	2.3	0.0%	0.0%	0.0
BRITISH COLUMBIA	24.1%	2.2	4.0%	14.0%	1.9	3.5%	9.7%	1.5	14.0%	39.5%	1.5	8.5%	33.0%	2.1	1.4%	3.8%	1.5
KELOWNA	1.1%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	1.1%	100.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
CAMPBELL RIVER/COURTNEY	17.9%	2.9	0.0%	0.0%	0.0	2.4%	7.0%	1.5	8.3%	27.9%	1.7	10.7%	55.8%	2.7	3.6%	9.3%	1.3
VANCOUVER CMA	27.5%	2.2	4.9%	15.4%	1.9	4.0%	10.0%	1.5	16.1%	40.3%	1.5	9.3%	31.0%	2.0	1.3%	3.3%	1.5
VANCOUVER 1	21.3%	2.5	0.0%	0.0%	0.0	5.8%	15.6%	1.4	6.3%	16.4%	1.4	14.6%	67.2%	2.5	0.4%	0.8%	1.0
VANCOUVER 2	27.0%	1.7	0.9%	2.0%	1.0	0.0%	0.0%	0.0	17.7%	54.0%	1.4	11.6%	36.0%	1.4	1.9%	8.0%	2.0
VANCOUVER 3	26.6%	2.3	10.6%	39.6%	2.3	1.8%	3.0%	1.0	18.3%	39.6%	1.3	5.5%	15.7%	1.8	1.4%	2.2%	1.0
VANCOUVER 4	45.2%	2.1	12.5%	16.2%	1.2	12.5%	22.2%	1.7	30.8%	58.6%	1.8	0.0%	0.0%	0.0	1.9%	3.0%	1.5

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

1.3. Tobacco Advertising by Class of Trade (Table 25)

Consumers are more likely to find tobacco ads in chain convenience, gas convenience stores and independent convenience stores than in pharmacies or grocery supermarkets that sell tobacco. The highest distribution of such goods remains in convenience chains (64.7%) marginally unchanged from last year, followed by independent convenience stores and gas stations (50.6% and 50%, respectively).

Nationally, the percentage of stores carrying tobacco ads has risen across all store types, except pharmacies. The percentage increase from all types, excluding pharmacies, has increased slightly¹². Numerically, fewer pharmacies than ever are selling tobacco, hence, there was no increase in percentage of pharmacies carrying tobacco ads.

Across each separate class of trade, counter-top displays were available in more stores than any other ad type closely followed by shelf talkers. Small surface stores (chains,

¹² Last year the results were All stores 41.7%; Convenience Chains 63.6%; Pharmacies 25%; Gas Stations 44.3%; Grocery Stores 9.9%; and Independent Convenience Stores 42.3%

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gas and independents) were the most likely to carry counter-top displays. Most stores with counter-top displays carried about two displays per location. In chain convenience stores with displays, the average number was closer to two and a half signs per store and more than that in grocery stores.

Across all channels, those stores with tobacco POS materials, on average, had more than three ad pieces per store. In the case of all store types, the average number of ads available in stores carrying is greater now than a year ago of 2.4 ads per store.

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

Table 25 – Weighted – Tobacco Point-of-Sale Advertising by Class of Trade All Ad Types – 2004

Region	All Store Types	Convenience Chains	Pharmacies	Gas	Grocery Super-markets	Ind't. Conv.
% Stores Carrying Any Ad	44.3%	64.7%	13.5%	50.0%	11.2%	50.6%
Average # All Ads In Store	3.8	4.0	3.2	3.7	3.7	3.7
% Stores With Danglers	10.2%	17.0%	1.8%	10.1%	2.7%	11.8%
Average # Danglers In Store	2.3	2.1	1.7	2.4	2.2	2.4
% Stores With Posters	12.4%	16.7%	3.6%	14.5%	3.9%	14.2%
Average # Posters In Store	1.9	2.0	1.4	1.7	2.0	1.9
% Stores With Shelf Talkers	19.3%	24.6%	5.6%	23.5%	3.8%	23.2%
Ave. # Shelf Talkers In Store	3.1	3.2	4.2	3.0	2.2	3.2
% Stores With Counter-Top Displays	24.2%	38.9%	7.6%	28.9%	6.4%	24.0%
Ave. # Counter-Top Displays In Store	2.1	2.4	1.4	1.9	2.6	2.1
% Stores With "Other" Ads	4.8%	7.9%	0.8%	5.3%	1.5%	5.2%
Ave. # "Other" Ads In Store	1.9	2.1	2.0	1.8	1.8	1.8

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 26)

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 42.2% in stores closest to schools/malls and 46.3% in stores further away. A notable difference between this year and last, is a decrease in ad distribution near schools and or malls and an increase in stores elsewhere.

Within the various trade classes, distribution differences based on location to schools/malls were largely insignificant. For stores in each class of trade, the evidence of tobacco ads is greater now than a year ago, with the exception of pharmacies.

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Table 26 – Weighted – Tobacco Ad % Distribution Based on Store Proximity to Schools/Malls – 1998-2004

	1998	1999	2000	2002	2003	2004
All Store Types						
Near	35.8%	41.6%	35.3%	31.5%	43.7%	42.2%
Away	42.2%	40.4%	35.1%	33.8%	40.1%	46.3%
Convenience Chains						
Near	59.1%	57.3%	61.5%	54.6%	65.6%	67.2%
Away	50.3%	50.6%	60.0%	60.4%	62.0%	62.2%
Pharmacies						
Near	25.9%	22.5%	24.3%	4.6%	25.6%	14.0%
Away	22.8%	19.5%	23.1%	4.9%	24.0%	12.7%
Gas Stations						
Near	30.0%	27.4%	33.6%	33.8%	47.2%	50.2%
Away	36.0%	30.2%	30.0%	34.2%	42.4%	49.8%
Independent Convenience						
Near	38.8%	47.3%	36.7%	34.3%	48.3%	50.9%
Away	44.6%	43.0%	35.3%	32.1%	38.3%	50.3%
Supermarkets						
Near	5.1%	6.9%	6.2%	10.8%	8.9%	10.6%
Away	16.6%	8.1%	9.3%	14.3%	11.8%	12.3%

SECTION 2.0 - Tobacco POS Advertising by Brand (Selected Classes of Trade)

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

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

Distribution - Nationally, the single tobacco brand with the highest distribution of ads was *du Maurier* with ads available in 44.5% of convenience chain stores. This is a noteworthy performance since there were more *du Maurier* ads than all "Other" brands at 29.8%. The second highest brand is *Matinee* with ads in 22% of stores.

Although the increase of signs in chain convenience stores from last year is insignificant¹³, the change in ad participation from the national brands indicates a considerable effort made by them to get their brand out there by taking centre stage on the tobacco shelves.

¹³ Final report of Findings ACNielsen 2003: 2.1 Convenience Chains (Excluding Independents & Gas Convenience Stores)

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

1. <i>du Maurier</i>	ads in 44.5% of stores
2. "Other" not specified	ads in 29.8% of stores
3. <i>Matinee</i>	ads in 22.0% of stores
4. <i>Export A</i> (excluding <i>Smooth</i>)	ads in 19.7% of stores
5. <i>Players</i>	ads in 18.8% of stores
6. <i>Benson & Hedges</i>	ads in 15.4% of stores

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

- tobacco brand promotions at point-of-sale were hard to find in British Columbia, Alberta, Quebec, and Ontario with anomalies found in Chicoutimi/Jonquière, Sherbrooke, Ottawa, St. Catharines, and Calgary;
- no convenience chains in Bathurst, New Brunswick carried tobacco POS ads;
- Nova Scotia where the highest number of stores containing ads was found (72.9%) the brand with the most coverage was *du Maurier* with 45.2%. This brand coverage outpaced "Other" which typically has the highest distribution across stores at 28.6%;
- 35.9% of Quebec stores carried *du Maurier* ads. Almost one in every four ads in a store was a *du Maurier* ad.
- *du Maurier* ads smothered stores in Ontario as well with almost 50% distribution and almost one third of every sign being a *du Maurier* ad;
- Ontario is also the province where more brands were likely to be advertised--- we found ads for all twelve of the brands we tracked (including "Other" brands) in Ontario. The next largest number of brands advertised was found across Quebec and Alberta;
- the brands with lowest distribution of ads in convenience chains nationally were *Belvedere*, *Canadian Classics*, *Export A Smooth*, *Remaining Export A*, *Rothman's*, and *Sportsman*.

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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* has become the single brand with the leading share of tobacco promotions at retail point-of-sale surpassing last year's leader *Players* and surpassing "Others".

1. <i>du Maurier</i>	27.5%
2. "Others" not specified	24.1%
3. <i>Matinee</i>	10.4%
4. <i>Export A</i> (excluding <i>Smooth</i>)	10.1%
5. <i>Players</i>	9.4%

Regionally, brand ad shares fluctuated with ad distribution.

Average Number of Ads per Store- The absolute number of ads per store handling is higher now than in the previous survey. Nationally, across all tobacco brands, the average convenience chain store with ads carried 4.0 ad pieces compared to last year's 3.1 ad pieces, and compared with 1.8 pieces in 2002. Distribution is higher this year than last reflecting the increase in the average number of ads in stores carrying tobacco advertising.

Table 27 – Weighted – % Distribution and No. of Ads per Store by Brand by Type
National Results – Convenience Chains – 2004

Ad Availability Chain Convenience	Total		C/T Display		Dangler		Poster		Shelf Talker		Other	
	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg
Brands	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg
Total	64.7%	4.00	38.9%	2.39	17.0%	2.14	16.7%	1.98	24.6%	3.24	7.9%	2.14
Belvedere	6.2%	1.39	1.4%	1.14	2.0%	1.05	1.0%	1.60	2.0%	1.45	0.2%	2.00
Benson & Hedges	15.4%	1.46	6.0%	1.37	2.6%	1.27	2.4%	1.04	5.8%	1.17	1.7%	1.00
Canadian Classics	6.5%	1.31	2.1%	1.00	1.7%	1.24	0.5%	2.60	2.5%	1.00	0.5%	1.00
du Maurier	44.5%	1.60	25.1%	1.13	8.1%	1.36	7.1%	1.17	15.0%	1.22	4.3%	1.19
Export A	19.7%	1.34	4.9%	1.08	2.9%	1.03	5.2%	1.08	7.0%	1.23	3.6%	1.06
Export A Smooth	1.9%	1.32	0.3%	1.00	0.4%	1.50	0.8%	1.00	0.4%	1.75	0.1%	1.00
Remaining Export A	2.1%	1.10	1.1%	1.09	0.3%	1.00	0.4%	1.00	0.4%	1.00	0.0%	0.00
Matinee	22.0%	1.23	5.9%	1.12	5.6%	1.04	3.6%	1.00	7.8%	1.22	1.5%	1.00
Players	18.8%	1.29	7.0%	1.11	4.6%	1.11	2.7%	1.19	5.0%	1.38	1.3%	1.00
Rothmans	2.0%	1.45	0.2%	1.50	0.3%	1.67	0.5%	2.20	0.9%	1.00	0.1%	1.00
Sportsman	0.5%	1.00	0.2%	1.00	0.0%	0.00	0.1%	1.00	0.1%	1.00	0.1%	1.00
Other	29.8%	2.09	18.9%	1.63	2.4%	1.08	3.3%	1.39	9.3%	2.39	1.8%	1.28

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Brand Advertising by Type of Ad - Counter-top displays are still the most popular form of POS ads in convenience chains. These were found in more stores than any other ad type (38.9%), and represents (35.9%) of all ads in convenience chain stores. They accounted for the largest share of ads for all of the leading advertised brands.

The distribution and share of Counter-Top-Displays has dropped this year and all other types of ads have increased to take up the shortage. The next highest distribution of ads are shelf talkers with 24.6% of all chain convenience stores carrying them and 30.8% of all ads in these stores being of this type.

Table 28 – Weighted – % Share of Ads by Type and by Brand – National Results – Convenience Chains - 2004

Share of Ads - Chain Convenience Stores						
	All Ads	C/T Display	Dangler	Poster	Shelf Talker	Other
Total	100%	35.9%	14.0%	12.8%	30.8%	6.5%
Belvedere	100%	18.6%	24.4%	18.6%	33.7%	4.7%
Benson & Hedges	100%	36.4%	14.7%	11.1%	30.2%	7.6%
Canadian Classics	100%	24.7%	24.7%	15.3%	29.4%	5.9%
du Maurier	100%	40.1%	15.4%	11.6%	25.7%	7.2%
Export A	100%	20.2%	11.4%	21.3%	32.7%	14.4%
Export A Smooth	100%	12.0%	24.0%	32.0%	28.0%	4.0%
Remaining Export A	100%	52.2%	13.0%	17.4%	17.4%	0.0%
Matinee	100%	24.4%	21.5%	13.3%	35.2%	5.6%
Players	100%	32.1%	21.0%	13.2%	28.4%	5.3%
Rothmans	100%	10.3%	17.2%	37.9%	31.0%	3.4%
Sportsman	100%	40.0%	0.0%	20.0%	20.0%	20.0%
Other	100%	49.4%	4.2%	7.3%	35.5%	3.7%

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:

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Table 29 – Weighted – Point-of-Sale Advertising: Tobacco Brands – Convenience Chains All Cities – 2004

<i>Ad Type: Counter-Top Displays</i>	Brand Share Of CT Displays	% Distribution	Ave. # Displays/Store
Other	33.2%	18.9%	1.6
du Maurier	30.7%	25.1%	1.1
Benson & Hedges	8.8%	6.0%	1.4
Players	8.4%	7.0%	1.1
Matinee	7.1%	5.9%	1.1
Export A	5.7%	4.9%	1.1
Ad Type: Posters			
<i>Ad Type: Posters</i>	Brand Share Of Posters	% Distribution	Ave. # Posters/Store
du Maurier	25.1%	7.1%	1.2
Export A	16.9%	5.2%	1.1
Other	13.9%	3.3%	1.4
Matinee	10.9%	3.6%	1.0
Players	9.7%	2.7%	1.2
Benson & Hedges	7.6%	2.4%	1.0
Ad Type: Shelf-Talkers			
<i>Ad Type: Shelf-Talkers</i>	Brand Share Of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
Other	27.8%	9.3%	2.4
du Maurier	22.9%	15.0%	1.2
Matinee	11.9%	7.8%	1.2
Export A	10.8%	7.0%	1.2
Players	8.6%	5.0%	1.4
Benson & Hedges	8.5%	5.8%	1.2
Ad Type: Danglers			
<i>Ad Type: Danglers</i>	Brand Share Of Danglers	% Distribution	Ave. # Danglers/Store
du Maurier	30.2%	8.1%	1.4
Matinee	15.9%	5.6%	1.0
Players	14.0%	4.6%	1.1
Benson & Hedges	9.1%	2.6%	1.3
Export A	8.2%	2.9%	1.0
Other	7.1%	2.4%	1.1
Ad Type: Other Forms			
<i>Ad Type: Other Forms</i>	Brand Share Of Other Ads	% Distribution	Ave. # Ads/Store
du Maurier	30.2%	4.3%	1.2
Export A	22.5%	3.6%	1.1
Other	13.6%	1.8%	1.3
Benson & Hedges	10.1%	1.7%	1.0
Matinee	8.9%	1.5%	1.0
Players	7.7%	1.3%	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.

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2.2. Independent Convenience Stores

Distribution - While more than fifty percent of independent convenience stores had tobacco ads, only one brand advertised in more than one fourth (25%) of these stores. The highest is *du Maurier* at 26.3% indicating a strong ad campaign for *du Maurier* this year. "Other" was second with 23.2% almost matching that of *du Maurier's* ad campaign. The distribution of promotional support items for the top advertised brands was:

1. <i>du Maurier</i>	ads in 26.3% of stores
2. "Other" (not specified)	ads in 23.2% of stores
3. <i>Export A</i> (excluding <i>Smooth</i>)	ads in 17.4% of stores
4. <i>Matinee</i>	ads in 15.5% of stores
5. <i>Players</i>	ads in 13.8% of stores
6. <i>Benson & Hedges</i>	ads in 13.4% of stores

Very few ads were found in independent convenience stores for *Sportsman*, *Export A Smooth*, *Rothmans*, and Remaining *Export A*.

The list of the top-promoted brands in these stores is identical to that in convenience chain stores. Last year the top three brands were "Other" (19.8%), *Players* (14.1%) and *du Maurier* (11.5%)¹⁴.

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

- Independent convenience stores national average of 50.6% surpassed the national average of ad distribution;
- the lowest distribution of ads is in Quebec and British Columbia;
- the highest distribution of ads is in Nova Scotia, New Brunswick, and Manitoba;
- the highest national distribution of ads is *du Maurier* at 26.3%;
- the provinces with the highest distribution of *du Maurier* ads are Ontario, Nova Scotia, and New Brunswick;
- no ads were found in Kelowna.

¹⁴ Final Report of Findings ACNielsen 2003: 2.2 Independent Convenience Stores

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Brand Share of Ads - the brands with the greatest share of ads were similar to those whose ads had the highest distribution (Table A-9). Nationally, brand share of advertising in independent convenience stores looked like this:

1. "Other" (not specified)	23.2%
2. <i>du Maurier</i>	20.2%
3. <i>Export A</i> (excluding <i>Smooth</i>)	11.9%
4. <i>Matinee</i>	10.5%
5. <i>Benson & Hedges</i>	10.2%

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 3.7 ads per store up from last year's 2.3 ads per store. For brands with highest ad distribution, most independent convenience store retailers carried no more than 1.9 ("Other" Brands) ad piece per store. The data suggests that, on average, two brands are advertised in independent convenience stores that carry tobacco ads.

Table 30 – Weighted – % Distribution and No. of Ads per Store by Brand by Type
National Results – Independent Convenience Stores - 2004

Ad Availability Independent Convenience	Total		C/T Display		Dangler		Poster		Shelf Talker		Other	
	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg
Brands	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg
Total	50.6%	3.7	24.0%	2.1	11.8%	2.4	14.2%	1.9	23.2%	3.2	5.2%	1.8
Belvedere	8.2%	1.3	1.3%	1.0	1.8%	1.5	2.0%	1.1	3.4%	1.1	0.4%	1.1
Benson & Hedges	13.4%	1.4	3.8%	1.3	2.5%	1.6	1.7%	1.1	6.7%	1.1	1.0%	1.0
Canadian Classics	6.7%	1.3	2.1%	1.0	1.5%	1.3	0.7%	1.5	2.6%	1.1	0.7%	1.3
du Maurier	26.3%	1.4	9.2%	1.1	4.1%	1.3	5.0%	1.2	11.9%	1.2	1.9%	1.0
Export A	17.4%	1.3	4.1%	1.1	2.2%	1.1	3.4%	1.1	8.6%	1.2	1.6%	1.1
Export A Smooth	1.6%	1.2	0.4%	1.0	0.6%	1.2	0.2%	1.0	0.5%	1.2	0.0%	0.0
Remaining Export A	2.1%	1.3	0.6%	1.2	0.5%	1.2	0.9%	1.1	0.4%	1.0	0.1%	1.0
Matinee	15.5%	1.3	3.6%	1.0	3.4%	1.2	3.3%	1.1	6.3%	1.2	0.8%	1.0
Players	13.8%	1.2	4.4%	1.0	2.1%	1.0	2.5%	1.0	5.9%	1.2	0.4%	1.0
Rothmans	2.1%	1.4	0.4%	1.0	1.0%	1.4	0.2%	1.3	0.7%	1.2	0.1%	1.0
Sportsman	0.5%	1.4	0.3%	1.3	0.0%	0.0	0.0%	0.0	0.2%	1.7	0.0%	0.0
Other	23.2%	1.9	11.0%	1.5	2.1%	1.2	3.8%	1.4	9.4%	1.9	1.5%	1.3

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Brand Advertising by Type of Ad - Counter-top displays accounted for about one-quarter of all ad types in independent convenience stores. This represents a drop from year ago levels (32.7%). Shelf-talkers have taken share from counter-top displays this year with more than one third of all ads in independent convenient stores that carry ads.

Among leading promoted brands, *du Maurier*, *Players*, and *Remaining Export A* rely most heavily on counter-top displays to promote themselves at point-of-sale. The shelf talker style has no brand that steals the show, instead all brands show a moderate strength in share hovering around the high thirty and low forty percentiles.

Table 31 – Weighted – % Share of Ads by Type and by Brand – National results – Independent Convenience Stores – 2004

Share of Ads - Independent Convenience						
Convenience Stores	All Ads	C/T Display	Dangler	Poster	Shelf Talker	Other
Total	100%	26.4%	14.8%	14.6%	39.2%	5.0%
Belvedere	100%	12.6%	26.2%	20.4%	36.6%	4.2%
Benson & Hedges	100%	24.6%	21.1%	10.3%	38.7%	5.3%
Canadian Classics	100%	24.7%	21.5%	11.4%	32.3%	10.1%
du Maurier	100%	27.5%	13.9%	15.4%	38.1%	5.2%
Export A	100%	20.3%	10.3%	16.3%	45.4%	7.8%
Export A Smooth	100%	23.5%	35.3%	8.8%	32.4%	0.0%
Remaining Export A	100%	26.0%	22.0%	34.0%	14.0%	4.0%
Matinee	100%	19.1%	21.4%	18.2%	37.3%	4.0%
Players	100%	26.6%	12.5%	15.1%	43.4%	2.3%
Rothmans	100%	12.7%	47.3%	9.1%	27.3%	3.6%
Sportsman	100%	61.5%	0.0%	0.0%	38.5%	0.0%
Other	100%	36.8%	5.6%	12.1%	41.1%	4.4%

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:

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table 32 – Weighted – Point-of-Sale Advertising: Tobacco Brands Independent Convenience Stores – All Cities – 2004

<i>Ad Type: Counter-Top Displays</i>	Brand Share Of CT Displays	% Distribution	Ave. # Displays/Store
Other	32.4%	11.0%	1.5
du Maurier	21.0%	9.2%	1.1
Benson & Hedges	9.5%	3.8%	1.3
Export A	9.2%	4.1%	1.1
Players	9.2%	4.4%	1.0
Matinee	7.6%	3.6%	1.0
Ad Type: Posters			
<i>Ad Type: Posters</i>	Brand Share Of Posters	% Distribution	Ave. # Posters/Store
du Maurier	21.2%	5.0%	1.2
Other	19.2%	3.8%	1.4
Export A	13.3%	3.4%	1.1
Matinee	13.1%	3.3%	1.1
Players	9.4%	2.5%	1.0
Belvedere	8.0%	2.0%	1.1
Ad Type: Shelf-Talkers			
<i>Ad Type: Shelf-Talkers</i>	Brand Share Of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
Other	24.4%	9.4%	1.9
du Maurier	19.6%	11.9%	1.2
Export A	13.8%	8.6%	1.2
Players	10.1%	5.9%	1.2
Benson & Hedges	10.1%	6.7%	1.1
Matinee	10.0%	6.3%	1.2
Ad Type: Danglers			
<i>Ad Type: Danglers</i>	Brand Share Of Danglers	% Distribution	Ave. # Danglers/Store
du Maurier	18.9%	4.1%	1.3
Matinee	15.1%	3.4%	1.2
Benson & Hedges	14.5%	2.5%	1.6
Belvedere	10.1%	1.8%	1.5
Other	8.9%	2.1%	1.2
Export A	8.2%	2.2%	1.1
Ad Type: Other Forms			
<i>Ad Type: Other Forms</i>	Brand Share Of Other Ads	% Distribution	Ave. # Ads/Store
du Maurier	21.0%	1.9%	1.0
Other	20.4%	1.5%	1.3
Export A	18.6%	1.6%	1.1
Benson & Hedges	10.8%	1.0%	1.0
Canadian Classics	9.6%	0.7%	1.3
Matinee	8.4%	0.8%	1.0

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

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2.3. Gas Stations/Kiosks

Distribution - nationally, tobacco POS ads were found in more of these stores this year than last and the year before (50.0% in 2004 and 44.3% in 2003 and 34.1% in 2002). Distribution of ads was also higher for most brands compared with year ago levels¹⁵.

Making a come-back this year is *du Maurier* with the highest distribution of ads in gas convenience stores at 29.7% considerably higher (more than double) than last year at 13.4%. Next highest is "Other" at 24.3%, and *Benson and Hedges* at 15.3%

1. <i>du Maurier</i>	ads in 29.7% of stores
2. "Other" (not specified)	ads in 24.3% of stores
3. <i>Benson & Hedges</i>	ads in 15.3% of stores
4. <i>Export A</i> (excluding <i>Smooth</i>)	ads in 15.1% of stores
5. <i>Matinee</i>	ads in 13.2% of stores

Regionally, distribution of POS for *Benson and Hedges* is higher across the West, while *du Maurier* has a good grip on the entire country. Promotional support for the "Other" group of brands is relatively strong everywhere where ads are found, but particularly across Manitoba and Saskatchewan.

There is only one city this year versus the several cities last year that no tobacco promotional materials were found in gas convenience outlets. This city is Charlottetown, and last year the cities were Halifax, Moncton, Saint John, Brandon, Regina, Saskatoon and Campbell River/Courtney.

Brand Share of Ads - "Other" brands and *du Maurier* account for almost half of all the tobacco ads we found in gas stores across the country. Although still rather concentrated behind relatively few tobacco brands, ad share is more concentrated this year than last¹⁶, with the resurgence of *du Maurier* promotions in gas stores.

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

1. "Other" (not specified)	26.3%
2. <i>du Maurier</i>	23.4%

¹⁵ Final Report of Findings ACNielsen 2003: 2.3 Gas Convenience Chains/Gas Kiosks

¹⁶ Final Report of Findings ACNielsen 2003: 2.3 Gas Convenience Chains/Gas Kiosks

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3. <i>Benson & Hedges</i>	10.5%
4. <i>Export A</i> (excluding <i>Smooth</i>)	10.3%
5. <i>Matinee</i>	9.0%

Average Number of Ads per Store - The most advertised tobacco brand (*du Maurier*) in gas stores had 1.5 ad pieces in such stores with ads. The average store carried 3.7 pieces of tobacco POS advertising nationally. These figures are higher than those of last year's survey and suggest that in, gas stores, as in chain and independent convenience stores the absolute number of tobacco POS ads has increased.

Table 33 – Weighted – % Distribution and No. of Ads per Store by Brand by Type
National Results – Gas Stations/Kiosks - 2004

Ad Availability Gas Stations/Kiosks	Total		C/T Display		Dangler		Poster		Shelf Talker		Other	
	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg	Dist%	Avg
Total	50.0%	3.7	28.9%	1.9	10.1%	2.4	14.5%	1.7	23.5%	3.0	5.3%	1.8
Belvedere	5.6%	1.3	1.0%	1.3	0.8%	1.3	1.5%	1.1	2.8%	1.2	0.1%	2.0
Benson & Hedges	15.3%	1.3	3.3%	1.1	2.5%	1.3	3.9%	1.1	7.1%	1.1	0.7%	1.0
Canadian Classics	6.4%	1.2	3.1%	1.0	1.1%	1.1	0.7%	1.0	2.0%	1.1	0.5%	1.0
du Maurier	29.7%	1.5	13.8%	1.2	3.5%	1.5	5.3%	1.0	12.3%	1.1	2.5%	1.0
Export A	15.1%	1.3	3.7%	1.0	2.1%	1.0	2.5%	1.0	7.8%	1.1	1.6%	1.2
Export A Smooth	1.7%	1.2	0.3%	1.0	0.3%	1.3	0.2%	1.0	0.9%	1.3	0.1%	1.0
Remaining Export A	2.1%	1.4	0.3%	1.0	0.6%	1.8	0.7%	1.2	0.6%	1.2	0.1%	2.0
Matinee	13.2%	1.3	3.8%	1.1	3.0%	1.2	2.5%	1.2	5.1%	1.1	0.3%	1.0
Players	11.7%	1.3	2.9%	1.1	2.3%	1.3	2.1%	1.0	5.3%	1.2	0.5%	1.1
Rothmans	1.9%	1.2	0.3%	1.0	0.7%	1.2	0.3%	1.0	0.7%	1.1	0.0%	0.0
Sportsman	0.3%	1.0	0.1%	1.0	0.0%	0.0	0.1%	1.0	0.1%	1.0	0.0%	0.0
Other	24.3%	2.0	13.3%	1.5	1.6%	1.3	3.4%	1.2	8.2%	2.5	0.02	1.3

Brand Advertising by Type of Ad - About forty percent (38.2%) of all tobacco POS ads found at gas station locations across the country were in the form of shelf talker displays. This is three times more than last year. Counter-top-displays decreased from 68.5% last year to 30% this year indicating a switch by tobacco retailers from the counter-top-display to the shelf talker display. This trend was noticed last year as the number of counter-top-displays began to decrease.

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Table 34 – Weighted – % Share of Ads by Type and by Brand – National Results – Gas Stations/Kiosks - 2004

Share of Ads - Gas Stations/Kiosks	All Ads	C/T Display	Dangler	Poster	Shelf Talker	Other
Total	100%	30.0%	13.1%	13.5%	38.2%	5.2%
Belvedere	100%	16.8%	14.2%	22.1%	43.4%	3.5%
Benson & Hedges	100%	18.2%	17.5%	21.6%	38.8%	3.8%
Canadian Classics	100%	41.2%	15.8%	8.8%	28.1%	6.1%
du Maurier	100%	37.4%	11.9%	12.7%	32.0%	6.0%
Export A	100%	19.7%	11.6%	13.0%	45.8%	9.9%
Export A Smooth	100%	15.6%	15.6%	9.4%	56.3%	3.1%
Remaining Export A	100%	8.9%	35.6%	26.7%	24.4%	4.4%
Matinee	100%	24.2%	22.2%	18.1%	33.9%	1.6%
Players	100%	20.9%	20.0%	13.8%	41.3%	4.0%
Rothmans	100%	14.7%	38.2%	11.8%	35.3%	0.0%
Sportsman	100%	25.0%	0.0%	25.0%	50.0%	0.0%
Other	100%	39.8%	4.4%	8.4%	42.0%	5.4%

Table 35 summarizes the leading advertised brands by type of tobacco POS promotion. For each brand, its share of each respective ad type is shown along with the percentage (distribution) of gas stations featuring at least one ad of that type and the average number of such ads per store carrying:

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Table 35 – Weighted – Point-of-Sale Advertising: Tobacco Brands – Gas Stations/Kiosks – All Cities – 2004

<i>Ad Type: Counter-Top Displays</i>	Brand Share Of CT Displays	% Distribution	Ave. # Displays/Store
Other	35.0%	13.3%	1.5
du Maurier	29.2%	13.8%	1.2
Matinee	7.2%	3.8%	1.1
Export A	6.8%	3.7%	1.0
Benson & Hedges	6.4%	3.3%	1.1
Canadian Classics	5.7%	3.1%	1.1
Ad Type: Posters			
<i>Ad Type: Posters</i>	Brand Share Of Posters	% Distribution	Ave. # Posters/Store
du Maurier	21.9%	5.3%	1.0
Benson & Hedges	16.8%	3.9%	1.1
Other	16.3%	3.4%	1.2
Matinee	12.0%	2.5%	1.2
Export A	9.9%	2.5%	1.0
Players	8.3%	2.1%	1.0
Ad Type: Shelf-Talkers			
<i>Ad Type: Shelf-Talkers</i>	Brand Share Of Shelf-Talkers	% Distribution	Ave. # Talkers/Store
Other	28.9%	8.2%	2.5
du Maurier	19.6%	12.3%	1.1
Export A	12.3%	7.8%	1.1
Benson & Hedges	10.7%	7.1%	1.1
Players	8.8%	5.3%	1.2
Matinee	7.9%	5.1%	1.1
Ad Type: Danglers			
<i>Ad Type: Danglers</i>	Brand Share Of Danglers	% Distribution	Ave. # Danglers/Store
du Maurier	21%	3%	1.5
Matinee	15%	3%	1.2
Benson & Hedges	14%	3%	1.3
Players	12%	2%	1.3
Export A	9%	2%	1.0
Other	9%	2%	1.3
Ad Type: Other Forms			
<i>Ad Type: Other Forms</i>	Brand Share Of Other Ads	% Distribution	Ave. # Ads/Store
du Maurier	27.1%	2.5%	1.0
Other	27.1%	2.0%	1.3
Export A	19.4%	1.6%	1.2
Benson & Hedges	7.6%	0.7%	1.0
Players	6.3%	0.5%	1.1
Canadian Classics	4.9%	0.5%	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

The findings of the 2004 survey results are very encouraging. Retailer compliance with sales-to-minors provisions of the tobacco laws rose this year to 82.3% from 67.7% in 2003.

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

Sales compliance levels at or above eighty percent have been achieved and are proving sustainable in the great majority of cities and towns measured by our survey. The percentage of communities among those where compliance is within the highest range continued to grow in 2004 (from nineteen cities to twenty), at the same time only one city (Saint John) resulted in less than sixty percent compliance, down from six cities in last year's study. These efforts are further reinforced at point-of-sale by higher compliance with the sign provisions of the laws.

The higher national compliance figure this year is due largely in part by significant increases in compliance in the four cities in the province of Quebec. The influence of these areas has been strong enough to pull up the national average, but in some cases is offset by lower scores in cities in some other provincial regions. The obvious next step is to focus the available resources against these last remaining pockets of resistance.

Certainly, the national result is the outcome of the net gains and losses across many cities, not just those in a single region, and we acknowledge that compliance levels rose this year in twenty of the thirty cities we visited. We isolated Quebec in this discussion because the increase in this province over last year's result was 40%.

We suggest that efforts towards rebuilding compliance levels in Saint John, Winnipeg and Saskatoon, where they suffered the strongest drops, back to their highs of over 70% compliance should result in significant benefits nationally as well.

The corollary of this strategy is that we cannot let our guard down in those cities and regions where we are already satisfied with the results. The trend data clearly shows that compliance can plummet sharply between surveys when adequate levels of regulatory enforcement and reinforcement are not sustained. The latest survey encourages health authorities to pursue the efforts taken to promote awareness and compliance and the lessons learned from the previous years' studies give us a good idea of where extra efforts must be directed to ensure the maximum positive impact on future national results. Additional resources and extra regulatory effort focused against our weakest markets could potentially help in raising low levels higher in those markets.

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Appendix

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

The following tables are included:

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

Table A-1 – Weighted – Tobacco Point-of-Sales Advertising Indicators – (2004) – All Classes of Trade

Table A - 1 Region	Total			Dangler			Shelf Talker			Posters			C/TD Displays			Other		
	Dist %	Avg		Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	44.3%	3.8	10.2%	13.9%	2.3	19.3%	36.1%	3.1	12.4%	13.9%	1.9	24.2%	30.6%	2.1	4.8%	5.5%	1.9	
NATIONAL CORE	42.9%	3.7	8.0%	10.1%	2.0	18.8%	36.4%	3.1	12.9%	15.2%	1.9	24.7%	33.0%	2.1	4.3%	5.3%	1.9	
ST. JOHNS	60.0%	4.0	24.6%	11.4%	1.1	52.8%	61.0%	2.8	0.5%	0.2%	1.0	42.1%	27.3%	1.6	0.0%	0.0%	0.0	
CHARLOTTETOWN	4.7%	4.5	2.3%	44.4%	4.0	1.2%	5.6%	1.0	0.0%	0.0%	0.0	2.3%	50.0%	4.5	0.0%	0.0%	0.0	
NEW BRUNSWICK	63.9%	3.8	17.7%	14.5%	2.0	35.0%	36.2%	2.5	27.1%	26.1%	2.3	17.3%	17.1%	2.4	8.7%	6.1%	1.7	
NEW BRUNSWICK CORE	61.2%	3.7	21.9%	19.3%	2.0	36.3%	33.8%	2.1	36.3%	38.2%	2.4	10.4%	7.5%	1.6	2.0%	1.1%	1.3	
BATHURST	58.3%	2.6	22.2%	21.8%	1.5	36.1%	43.6%	1.8	5.6%	7.3%	2.0	25.0%	25.5%	1.6	2.8%	1.8%	1.0	
FREDERICTON	66.2%	2.7	1.4%	0.8%	1.0	23.0%	18.5%	1.4	44.6%	69.2%	2.7	13.5%	10.8%	1.4	1.4%	0.8%	1.0	
MONCTON	71.1%	4.1	6.6%	4.6%	2.0	31.6%	41.1%	3.8	2.6%	0.9%	1.0	35.5%	37.0%	3.0	26.3%	16.4%	1.8	
SAINT JOHN	58.2%	5.1	38.5%	27.8%	2.1	47.3%	39.3%	2.5	41.8%	29.6%	2.1	2.2%	2.2%	3.0	2.2%	1.1%	1.5	
NOVA SCOTIA	72.9%	3.1	2.1%	1.3%	1.4	39.6%	60.0%	3.4	31.4%	24.6%	1.8	14.1%	13.7%	2.2	0.8%	0.4%	1.0	
HALIFAX	66.9%	3.8	1.6%	0.8%	1.3	58.9%	78.1%	3.4	4.8%	2.7%	1.4	21.4%	18.2%	2.2	0.4%	0.2%	1.0	
SYDNEY	84.4%	1.9	3.1%	2.9%	1.5	2.3%	5.3%	3.7	82.8%	90.9%	1.8	0.0%	0.0%	0.0	1.6%	1.0%	1.0	
QUEBEC	36.4%	3.6	8.0%	9.8%	1.6	8.0%	22.8%	3.7	13.7%	21.0%	2.0	23.8%	44.2%	2.4	1.8%	2.3%	1.6	
CHICOUTIMI/JONQUIERE	66.7%	2.3	30.2%	30.6%	1.6	7.1%	6.7%	1.4	8.7%	11.9%	2.1	42.9%	49.7%	1.8	1.6%	1.0%	1.0	
MONTREAL	38.5%	3.2	8.5%	11.3%	1.6	9.6%	27.4%	3.5	18.1%	23.1%	1.5	21.7%	32.6%	1.8	4.1%	5.7%	1.7	
QUEBEC CITY	11.6%	5.4	0.3%	0.5%	1.0	0.9%	6.4%	4.3	0.0%	0.0%	0.0	11.6%	93.1%	5.0	0.0%	0.0%	0.0	
SHERBROOKE	69.8%	4.9	3.8%	2.2%	2.0	25.5%	34.9%	4.7	46.2%	35.2%	2.6	46.2%	27.7%	2.0	0.0%	0.0%	0.0	
ONTARIO	47.9%	4.8	18.9%	26.7%	3.2	24.1%	36.8%	3.5	11.6%	9.5%	1.9	19.6%	15.5%	1.8	12.7%	11.5%	2.1	
ONTARIO CORE	43.8%	5.0	10.3%	16.6%	3.5	24.0%	38.7%	3.5	12.7%	11.0%	1.9	22.1%	19.1%	1.9	15.1%	14.6%	2.1	
KINGSTON	53.1%	5.9	6.2%	4.4%	2.2	37.0%	57.9%	4.9	9.9%	8.3%	2.6	21.0%	13.5%	2.0	24.7%	15.9%	2.0	
OTTAWA	73.4%	6.7	7.0%	3.3%	2.3	48.1%	51.8%	5.3	1.9%	0.5%	1.3	51.4%	20.5%	2.0	52.8%	23.9%	2.2	
ST. CATHARINES	63.0%	2.3	48.9%	71.5%	2.1	12.8%	9.7%	1.1	9.7%	10.3%	1.5	7.5%	6.1%	1.2	3.1%	2.4%	1.1	
SUDBURY	38.1%	1.3	8.6%	19.2%	1.1	3.8%	7.7%	1.0	25.7%	69.2%	1.3	1.0%	1.9%	1.0	1.0%	1.9%	1.0	
THUNDER BAY	45.3%	11.2	44.0%	54.3%	6.3	45.3%	36.5%	4.1	6.7%	2.4%	1.8	25.3%	6.6%	1.3	1.3%	0.3%	1.0	
TORONTO	40.3%	4.8	13.8%	33.1%	4.6	22.3%	23.1%	2.0	19.7%	21.6%	2.1	19.7%	18.5%	1.8	4.6%	3.8%	1.6	
WINDSOR	17.0%	1.6	6.9%	34.1%	1.4	9.4%	47.7%	1.4	0.6%	2.3%	1.0	3.1%	13.6%	1.2	0.6%	2.3%	1.0	
MANITOBA	56.8%	3.3	11.8%	8.9%	1.4	8.9%	8.8%	1.9	16.9%	16.7%	1.9	45.6%	56.7%	2.4	8.6%	8.9%	2.0	
BRANDON	64.1%	1.9	23.1%	18.8%	1.0	51.3%	56.3%	1.4	0.0%	0.0%	0.0	23.1%	18.8%	1.0	2.6%	6.3%	3.0	
WINNIPEG	55.9%	3.5	10.4%	8.1%	1.5	3.3%	4.9%	2.9	19.1%	18.1%	1.9	48.5%	59.7%	2.4	9.4%	9.1%	1.9	
SASKATCHEWAN	54.3%	5.4	4.6%	2.8%	1.8	39.7%	61.6%	4.6	12.6%	6.1%	1.4	44.0%	29.5%	2.0	0.0%	0.0%	0.0	
REGINA	50.8%	5.7	0.0%	0.0%	0.0	32.0%	80.4%	7.2	4.7%	3.8%	2.3	26.6%	15.8%	1.7	0.0%	0.0%	0.0	
SASKATOON	56.9%	5.2	8.0%	4.8%	1.8	45.4%	48.2%	3.2	18.4%	7.7%	1.3	56.9%	39.3%	2.1	0.0%	0.0%	0.0	
ALBERTA	43.1%	3.2	6.1%	6.0%	1.4	13.1%	16.5%	1.7	11.1%	14.4%	1.8	32.8%	60.5%	2.5	2.3%	2.7%	1.6	
ALBERTA CORE	42.9%	3.2	5.2%	5.0%	1.3	13.0%	15.9%	1.7	11.7%	15.2%	1.8	32.7%	61.0%	2.5	2.4%	2.9%	1.6	
CALGARY	51.1%	2.5	4.3%	5.3%	1.6	15.5%	18.8%	1.6	8.3%	10.0%	1.6	39.9%	65.9%	2.1	0.0%	0.0%	0.0	
EDMONTON	40.7%	4.1	6.8%	4.7%	1.1	11.3%	12.9%	1.9	17.2%	19.6%	1.9	31.2%	57.8%	3.1	5.0%	5.0%	1.6	
MEDICINE HAT	9.4%	1.5	1.6%	11.1%	1.0	7.8%	55.6%	1.0	1.6%	11.1%	1.0	1.6%	11.1%	1.0	1.6%	11.1%	1.0	
RED DEER	47.7%	3.0	20.5%	22.2%	1.6	15.9%	25.4%	2.3	0.0%	0.0%	0.0	34.1%	52.4%	2.2	0.0%	0.0%	0.0	
BRITISH COLUMBIA	24.1%	2.2	4.0%	14.0%	1.9	8.5%	33.0%	2.1	3.5%	9.7%	1.5	14.0%	39.5%	1.5	1.4%	3.8%	1.5	
KELOWNA	1.1%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	1.1%	100.0%	2.0	0.0%	0.0%	0.0	
CAMPBELL RIVER/COURTNAY	17.9%	2.9	0.0%	0.0%	0.0	10.7%	55.8%	2.7	2.4%	7.0%	1.5	8.3%	27.9%	1.7	3.6%	9.3%	1.3	
VANCOUVER CMA	27.5%	2.2	4.9%	15.4%	1.9	9.3%	31.0%	2.0	4.0%	10.0%	1.5	16.1%	40.3%	1.5	1.3%	3.3%	1.5	
VANCOUVER 1	21.3%	2.5	0.0%	0.0%	0.0	14.6%	67.2%	2.5	5.8%	15.6%	1.4	6.3%	16.4%	1.4	0.4%	0.8%	1.0	
VANCOUVER 2	27.0%	1.7	0.9%	2.0%	1.0	11.6%	36.0%	1.4	0.0%	0.0%	0.0	17.7%	54.0%	1.4	1.9%	8.0%	2.0	
VANCOUVER 3	26.6%	2.3	10.6%	39.6%	2.3	5.5%	15.7%	1.8	1.8%	3.0%	1.0	18.3%	39.6%	1.3	1.4%	2.2%	1.0	
VANCOUVER 4	45.2%	2.1	12.5%	16.2%	1.2	0.0%	0.0%	0.0	12.5%	22.2%	1.7	30.8%	58.6%	1.8	1.9%	3.0%	1.5	

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

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

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-2 – Weighted – Tobacco Point-of-Sale Advertising Indicators – (2004) – Chain Convenience Stores

Table A - 2 Region	Total		Dangler			Shelf Talker			Posters			C/TD Displays			Other		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	64.7%	3.8	17.0%	14.0%	2.3	24.6%	30.8%	3.1	16.7%	12.8%	1.9	38.9%	35.9%	2.1	7.9%	6.5%	1.9
NATIONAL CORE	62.7%	4.0	12.1%	9.1%	2.1	23.8%	31.7%	3.2	17.9%	13.9%	2.0	40.7%	39.1%	2.4	7.4%	6.3%	2.1
ST. JOHNS	100.0%	5.8	82.4%	15.2%	1.1	100.0%	63.6%	3.7	0.0%	0.0%	0.0	70.6%	21.2%	1.8	0.0%	0.0%	0.0
CHARLOTTETOWN	18.2%	4.5	9.1%	11.1%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	9.1%	88.9%	8.0	0.0%	0.0%	0.0
NEW BRUNSWICK	82.8%	4.3	27.6%	17.5%	2.3	41.4%	26.2%	2.3	41.4%	29.1%	2.5	20.7%	15.5%	2.7	17.2%	11.7%	2.4
NEW BRUNSWICK CORE	81.3%	4.6	37.5%	21.7%	2.2	50.0%	23.3%	1.8	68.8%	48.3%	2.6	6.3%	3.3%	2.0	6.3%	3.3%	2.0
BATHURST	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FREDERICTON	71.4%	2.0	0.0%	0.0%	0.0	14.3%	10.0%	1.0	42.9%	70.0%	2.3	14.3%	20.0%	2.0	0.0%	0.0%	0.0
MONCTON	84.6%	3.9	15.4%	11.6%	2.5	30.8%	30.2%	3.3	7.7%	2.3%	1.0	38.5%	32.6%	2.8	30.8%	23.3%	2.5
SAINT JOHN	88.9%	6.3	66.7%	26.0%	2.2	77.8%	26.0%	1.9	88.9%	44.0%	2.8	0.0%	0.0%	0.0	11.1%	4.0%	2.0
NOVA SCOTIA	85.7%	3.5	4.8%	2.4%	1.5	47.6%	65.9%	4.2	33.3%	19.0%	1.7	14.3%	11.9%	2.5	2.4%	0.8%	1.0
HALIFAX	80.0%	4.2	0.0%	0.0%	0.0	66.7%	82.2%	4.2	10.0%	3.0%	1.0	20.0%	14.9%	2.5	0.0%	0.0%	0.0
SYDNEY	100.0%	2.1	16.7%	12.0%	1.5	0.0%	0.0%	0.0	91.7%	84.0%	1.9	0.0%	0.0%	0.0	8.3%	4.0%	1.0
QUEBEC	56.0%	4.1	8.2%	6.7%	1.9	8.7%	20.0%	5.3	23.9%	22.3%	2.1	40.2%	50.6%	2.9	1.1%	0.5%	1.0
CHICOUTIMI/JONQUIERE	91.7%	2.4	58.3%	50.0%	1.9	0.0%	0.0%	0.0	0.0%	0.0%	0.0	58.3%	50.0%	1.9	0.0%	0.0%	0.0
MONTREAL	64.3%	3.4	6.1%	4.7%	1.7	10.2%	25.9%	5.5	31.6%	26.4%	1.8	42.9%	42.0%	2.1	2.0%	0.9%	1.0
QUEBEC CITY	19.6%	7.2	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	19.6%	100.0%	7.2	0.0%	0.0%	0.0
SHERBROOKE	100.0%	5.8	11.1%	4.8%	2.5	33.3%	27.9%	4.8	72.2%	36.5%	2.9	77.8%	30.8%	2.3	0.0%	0.0%	0.0
ONTARIO	63.8%	5.0	28.8%	24.7%	2.7	34.1%	35.2%	3.3	15.8%	10.9%	2.2	27.6%	16.7%	1.9	17.3%	12.6%	2.3
ONTARIO CORE	57.1%	5.5	15.1%	13.8%	2.9	35.6%	39.4%	3.5	19.2%	12.6%	2.1	30.6%	18.4%	1.9	21.0%	15.8%	2.4
KINGSTON	88.9%	6.4	27.8%	10.8%	2.2	50.0%	47.1%	5.3	11.1%	4.9%	2.5	44.4%	20.6%	2.6	38.9%	16.7%	2.4
OTTAWA	100.0%	7.8	19.6%	7.1%	2.8	70.6%	48.5%	5.3	7.8%	1.3%	1.3	68.6%	19.4%	2.2	70.6%	23.7%	2.6
ST. CATHARINES	81.9%	2.6	68.1%	69.5%	2.2	23.6%	13.0%	1.2	6.9%	8.4%	2.6	12.5%	7.8%	1.3	2.8%	1.3%	1.0
SUDBURY	53.3%	1.4	13.3%	18.2%	1.0	6.7%	9.1%	1.0	40.0%	72.7%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0
THUNDER BAY	42.9%	12.5	42.9%	52.0%	6.5	42.9%	25.3%	3.2	14.3%	8.0%	3.0	35.7%	13.3%	2.0	7.1%	1.3%	1.0
TORONTO	52.9%	4.8	13.7%	21.5%	4.0	35.3%	26.9%	1.9	31.4%	28.5%	2.3	28.4%	17.7%	1.6	8.8%	5.4%	1.6
WINDSOR	23.5%	1.9	13.7%	39.1%	1.3	9.8%	39.1%	1.8	0.0%	0.0%	0.0	5.9%	17.4%	1.3	2.0%	4.3%	1.0
MANITOBA	88.5%	2.8	9.8%	5.3%	1.3	4.9%	5.3%	2.7	11.5%	7.3%	1.6	83.6%	77.3%	2.3	6.6%	4.7%	1.8
BRANDON	25.0%	2.0	0.0%	0.0%	0.0	25.0%	50.0%	1.0	0.0%	0.0%	0.0	25.0%	50.0%	1.0	0.0%	0.0%	0.0
WINNIPEG	93.0%	2.8	10.5%	5.4%	1.3	3.5%	4.7%	3.5	12.3%	7.4%	1.6	87.7%	77.7%	2.3	7.0%	4.7%	1.8
SASKATCHEWAN	72.7%	4.6	4.5%	2.7%	2.0	34.1%	56.8%	5.5	13.6%	6.2%	1.5	54.5%	34.2%	2.1	0.0%	0.0%	0.0
REGINA	90.0%	4.6	0.0%	0.0%	0.0	45.0%	72.0%	6.6	15.0%	7.3%	2.0	50.0%	20.7%	1.7	0.0%	0.0%	0.0
SASKATOON	58.3%	4.6	8.3%	6.3%	2.0	25.0%	37.5%	4.0	12.5%	4.7%	1.0	58.3%	51.6%	2.4	0.0%	0.0%	0.0
ALBERTA	73.1%	3.2	13.4%	6.7%	1.2	19.4%	13.7%	1.6	16.1%	10.6%	1.5	55.9%	65.5%	2.7	4.8%	3.5%	1.7
ALBERTA CORE	72.8%	3.2	12.8%	6.5%	1.2	19.4%	14.0%	1.7	16.7%	11.1%	1.5	55.0%	64.8%	2.7	5.0%	3.6%	1.7
CALGARY	83.3%	2.6	10.0%	6.6%	1.4	21.1%	12.7%	1.3	12.2%	8.6%	1.5	68.9%	72.1%	2.3	0.0%	0.0%	0.0
EDMONTON	65.9%	3.9	16.5%	6.4%	1.0	18.8%	15.1%	2.1	22.4%	13.3%	1.5	43.5%	58.3%	3.4	10.6%	6.9%	1.7
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
RED DEER	83.3%	3.4	33.3%	11.8%	1.0	16.7%	5.9%	1.0	0.0%	0.0%	0.0	83.3%	82.4%	2.8	0.0%	0.0%	0.0
BRITISH COLUMBIA	36.2%	2.3	3.8%	7.0%	1.5	16.2%	37.2%	1.9	2.9%	7.0%	2.0	21.9%	45.3%	1.7	1.9%	3.5%	1.5
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
CAMPBELL RIVER/COURTNA	37.5%	3.0	0.0%	0.0%	0.0	12.5%	22.2%	2.0	12.5%	11.1%	1.0	25.0%	33.3%	1.5	25.0%	33.3%	1.5
VANCOUVER CMA	39.3%	2.2	4.5%	7.8%	1.5	18.0%	39.0%	1.9	2.2%	6.5%	2.5	23.6%	46.8%	1.7	0.0%	0.0%	0.0
VANCOUVER 1	27.8%	3.0	0.0%	0.0%	0.0	25.0%	70.0%	2.3	2.8%	10.0%	3.0	8.3%	20.0%	2.0	0.0%	0.0%	0.0
VANCOUVER 2	53.8%	1.4	0.0%	0.0%	0.0	19.2%	30.0%	1.2	0.0%	0.0%	0.0	38.5%	70.0%	1.4	0.0%	0.0%	0.0
VANCOUVER 3	36.4%	2.4	13.6%	26.3%	1.7	9.1%	15.8%	1.5	0.0%	0.0%	0.0	27.3%	57.9%	1.8	0.0%	0.0%	0.0
VANCOUVER 4	60.0%	2.7	20.0%	12.5%	1.0	0.0%	0.0%	0.0	20.0%	25.0%	2.0	40.0%	62.5%	2.5	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
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Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-3 – Weighted – Tobacco Point-of-Sale Advertising Indicators – (2004)
Pharmacies

Table A - 3 Region	Total		Dangler			Shelf Talker			Posters			C/TD Displays			Other		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	13.5%	3.8	1.8%	7.0%	2.3	5.6%	53.8%	3.1	3.6%	11.1%	1.9	7.6%	24.6%	2.1	0.8%	3.5%	1.9
NATIONAL CORE	13.8%	3.2	1.8%	7.0%	1.7	5.7%	53.8%	4.2	3.6%	11.1%	1.4	7.8%	24.6%	1.4	0.8%	3.5%	2.0
ST. JOHNS	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-
CHARLOTTETOWN	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-
NEW BRUNSWICK	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
NEW BRUNSWICK CORE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
BATHURST	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FREDERICTON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
MONCTON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SAINT JOHN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
NOVA SCOTIA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
HALIFAX	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SYDNEY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
QUEBEC	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
CHICOUTIMI/JONQUIERE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
MONTREAL	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
QUEBEC CITY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SHERBROOKE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ONTARIO	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ONTARIO CORE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
KINGSTON	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
OTTAWA	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ST. CATHARINES	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SUDBURY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
THUNDER BAY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
TORONTO	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
WINDSOR	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
MANITOBA	23.9%	2.4	4.3%	11.5%	1.5	2.2%	19.2%	5.0	10.9%	34.6%	1.8	6.5%	11.5%	1.0	6.5%	23.1%	2.0
BRANDON	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-
WINNIPEG	25.0%	2.4	4.5%	11.5%	1.5	2.3%	19.2%	5.0	11.4%	34.6%	1.8	6.8%	11.5%	1.0	6.8%	23.1%	2.0
SASKATCHEWAN	32.1%	4.8	0.0%	0.0%	-	22.6%	77.8%	5.3	3.8%	2.5%	1.0	22.6%	19.8%	1.3	0.0%	0.0%	-
REGINA	35.3%	6.8	0.0%	0.0%	-	29.4%	95.1%	7.8	0.0%	0.0%	-	5.9%	4.9%	2.0	0.0%	0.0%	-
SASKATOON	30.6%	3.6	0.0%	0.0%	-	19.4%	60.0%	3.4	5.6%	5.0%	1.0	30.6%	35.0%	1.3	0.0%	0.0%	-
ALBERTA	12.8%	2.8	2.7%	15.1%	2.0	5.4%	34.0%	2.3	4.0%	13.2%	1.2	8.1%	37.7%	1.7	0.0%	0.0%	-
ALBERTA CORE	13.6%	2.8	2.9%	15.1%	2.0	5.7%	34.0%	2.3	4.3%	13.2%	1.2	8.6%	37.7%	1.7	0.0%	0.0%	-
CALGARY	21.9%	2.2	3.1%	12.9%	2.0	9.4%	45.2%	2.3	3.1%	9.7%	1.5	10.9%	32.3%	1.4	0.0%	0.0%	-
EDMONTON	7.6%	4.4	3.0%	18.2%	2.0	3.0%	18.2%	2.0	6.1%	18.2%	1.0	7.6%	45.5%	2.0	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%	-
RED DEER	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-
BRITISH COLUMBIA	5.2%	1.8	0.9%	9.1%	1.0	0.9%	54.5%	6.0	0.9%	9.1%	1.0	2.6%	27.3%	1.0	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%	-
CAMPBELL RIVER/COURTNAY	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-	0.0%	0.0%	-
VANCOUVER CMA	6.2%	1.8	1.0%	9.1%	1.0	1.0%	54.5%	6.0	1.0%	9.1%	1.0	3.1%	27.3%	1.0	0.0%	0.0%	-
VANCOUVER 1	6.1%	3.5	0.0%	0.0%	-	3.0%	85.7%	6.0	3.0%	14.3%	1.0	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%	-
VANCOUVER 3	12.9%	1.0	3.2%	25.0%	1.0	0.0%	0.0%	-	0.0%	0.0%	-	9.7%	75.0%	1.0	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%	-

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

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-4 – Weighted – Tobacco Point-of-Sale Advertising Indicators – (2004) – Gas Stations/Kiosks

Table A - 4 Region	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	50.0%	3.8	10.1%	13.1%	2.3	23.5%	38.2%	3.1	14.5%	13.5%	1.9	28.9%	30.0%	2.1	5.3%	5.2%	1.9
NATIONAL CORE	50.1%	3.7	8.8%	10.1%	2.4	23.5%	38.8%	3.0	15.4%	14.9%	1.7	29.7%	31.2%	1.9	4.9%	5.0%	1.8
ST. JOHNS	90.9%	3.8	31.8%	11.3%	1.2	75.0%	54.7%	2.5	2.3%	0.7%	1.0	72.7%	33.3%	1.6	0.0%	0.0%	0.0
CHARLOTTETOWN	0.0%	0.0	0.0%	0.0%	0.0	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	74.6%	3.7	21.1%	13.1%	1.7	46.5%	41.4%	2.5	25.4%	17.7%	1.9	23.9%	23.2%	2.7	8.5%	4.5%	1.5
NEW BRUNSWICK CORE	80.9%	3.4	31.9%	19.8%	1.7	53.2%	43.5%	2.3	38.3%	26.7%	1.9	14.9%	9.2%	1.7	2.1%	0.8%	1.0
BATHURST	69.2%	2.9	30.8%	30.8%	2.0	30.8%	26.9%	1.8	7.7%	3.8%	1.0	38.5%	34.6%	1.8	7.7%	3.8%	1.0
FREDERICTON	78.9%	2.5	5.3%	2.6%	1.0	36.8%	23.7%	1.3	52.6%	65.8%	2.5	10.5%	7.9%	1.5	0.0%	0.0%	0.0
MONCTON	62.5%	4.5	0.0%	0.0%	0.0	33.3%	37.3%	3.1	0.0%	0.0%	0.0	41.7%	50.7%	3.4	20.8%	11.9%	1.6
SAINT JOHN	93.3%	4.8	66.7%	25.4%	1.7	93.3%	61.2%	2.9	46.7%	13.4%	1.3	0.0%	0.0%	0.0	0.0%	0.0%	0.0
NOVA SCOTIA	72.8%	2.8	1.9%	1.4%	1.5	35.0%	50.2%	2.9	36.9%	34.8%	1.9	13.6%	13.5%	2.0	0.0%	0.0%	0.0
HALIFAX	61.5%	3.3	1.5%	0.8%	1.0	52.3%	72.0%	2.8	6.2%	6.1%	2.0	21.5%	21.2%	2.0	0.0%	0.0%	0.0
SYDNEY	92.1%	2.1	2.6%	2.7%	2.0	5.3%	12.0%	4.5	89.5%	85.3%	1.9	0.0%	0.0%	0.0	0.0%	0.0%	0.0
QUEBEC	36.5%	3.5	8.6%	11.1%	1.7	13.3%	32.2%	3.1	16.7%	24.2%	1.8	18.9%	28.2%	1.9	3.0%	4.4%	1.9
CHICOUTIMI/JONQUIERE	61.3%	2.3	25.8%	27.9%	1.5	16.1%	18.6%	1.6	12.9%	23.3%	2.5	25.8%	27.9%	1.5	3.2%	2.3%	1.0
MONTREAL	40.4%	3.4	9.6%	13.3%	1.9	16.0%	35.9%	3.1	22.3%	21.9%	1.3	16.0%	19.5%	1.7	6.4%	9.4%	2.0
QUEBEC CITY	7.7%	4.0	1.3%	4.2%	1.0	1.3%	12.5%	3.0	0.0%	0.0%	0.0	7.7%	83.3%	3.3	0.0%	0.0%	0.0
SHERBROOKE	73.3%	4.7	6.7%	2.9%	1.5	33.3%	37.9%	3.9	46.7%	33.0%	2.4	50.0%	26.2%	1.8	0.0%	0.0%	0.0
ONTARIO	49.1%	4.5	14.0%	23.7%	3.8	24.0%	37.8%	3.5	13.7%	10.7%	1.7	22.3%	16.2%	1.6	13.4%	11.7%	1.9
ONTARIO CORE	51.4%	4.4	7.7%	13.1%	3.8	24.7%	39.2%	3.6	16.2%	13.5%	1.9	26.3%	20.0%	1.7	15.8%	14.2%	2.0
KINGSTON	33.3%	5.4	0.0%	0.0%	0.0	28.6%	63.2%	4.0	0.0%	0.0%	0.0	14.3%	10.5%	1.3	28.6%	26.3%	1.7
OTTAWA	87.7%	5.6	4.6%	1.6%	1.7	49.2%	50.9%	5.1	0.0%	0.0%	0.0	67.7%	24.2%	1.8	55.4%	23.3%	2.1
ST. CATHARINES	42.6%	1.7	29.6%	68.4%	1.6	3.7%	5.3%	1.0	11.1%	15.8%	1.0	3.7%	5.3%	1.0	3.7%	5.3%	1.0
SUDBURY	22.9%	1.4	2.9%	9.1%	1.0	0.0%	0.0%	0.0	20.0%	90.9%	1.4	0.0%	0.0%	0.0	0.0%	0.0%	0.0
THUNDER BAY	53.6%	9.7	50.0%	58.2%	6.1	53.6%	34.2%	3.3	7.1%	1.4%	1.0	28.6%	6.2%	1.1	0.0%	0.0%	0.0
TORONTO	58.8%	3.7	14.7%	30.3%	4.5	27.5%	24.0%	1.9	31.4%	29.0%	2.0	20.6%	14.9%	1.6	2.9%	1.8%	1.3
WINDSOR	4.4%	1.0	0.0%	0.0%	0.0	2.2%	50.0%	1.0	2.2%	50.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
MANITOBA	73.6%	3.4	19.8%	13.0%	1.7	13.2%	6.5%	1.3	24.2%	13.9%	1.5	57.1%	57.1%	2.5	12.1%	9.5%	2.0
BRANDON	88.2%	1.7	29.4%	19.2%	1.0	58.8%	50.0%	1.3	0.0%	0.0%	0.0	29.4%	19.2%	1.0	5.9%	11.5%	3.0
WINNIPEG	70.3%	3.9	17.6%	12.2%	1.9	2.7%	1.0%	1.0	29.7%	15.6%	1.5	63.5%	62.0%	2.7	13.5%	9.3%	1.9
SASKATCHEWAN	70.7%	5.8	8.6%	3.8%	1.8	59.5%	60.8%	4.2	17.2%	6.3%	1.5	59.5%	29.1%	2.0	0.0%	0.0%	0.0
REGINA	54.9%	6.2	0.0%	0.0%	0.0	39.2%	83.8%	7.3	3.9%	3.5%	3.0	29.4%	12.7%	1.5	0.0%	0.0%	0.0
SASKATOON	83.1%	5.6	15.4%	5.9%	1.8	75.4%	47.7%	3.0	27.7%	7.9%	1.3	83.1%	38.5%	2.2	0.0%	0.0%	0.0
ALBERTA	45.1%	2.6	3.8%	4.7%	1.4	12.6%	15.9%	1.5	10.4%	15.4%	1.7	35.2%	62.6%	2.1	1.6%	1.4%	1.0
ALBERTA CORE	43.9%	2.7	3.5%	4.5%	1.5	12.9%	16.1%	1.5	11.1%	16.6%	1.7	33.9%	61.3%	2.1	1.8%	1.5%	1.0
CALGARY	61.0%	2.0	3.9%	6.3%	2.0	18.2%	18.9%	1.3	9.1%	10.5%	1.4	48.1%	64.2%	1.6	0.0%	0.0%	0.0
EDMONTON	35.7%	3.9	2.9%	2.0%	1.0	8.6%	12.2%	2.0	15.7%	22.4%	2.0	28.6%	61.2%	3.0	2.9%	2.0%	1.0
MEDICINE HAT	12.5%	2.0	4.2%	16.7%	1.0	8.3%	33.3%	1.0	4.2%	16.7%	1.0	4.2%	16.7%	1.0	4.2%	16.7%	1.0
RED DEER	63.6%	2.1	9.1%	6.7%	1.0	9.1%	13.3%	2.0	0.0%	0.0%	0.0	54.5%	80.0%	2.0	0.0%	0.0%	0.0
BRITISH COLUMBIA	32.7%	2.3	5.7%	18.9%	2.5	10.7%	28.3%	2.0	4.3%	7.5%	1.3	22.1%	42.5%	1.5	1.8%	2.8%	1.2
KELOWNA	2.3%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	2.3%	100.0%	2.0	0.0%	0.0%	0.0
CAMPBELL RIVER/COURTNAY	12.5%	4.7	0.0%	0.0%	0.0	12.5%	78.6%	3.7	0.0%	0.0%	0.0	8.3%	21.4%	1.5	0.0%	0.0%	0.0
VANCOUVER CMA	41.1%	2.2	7.5%	20.4%	2.5	12.6%	25.0%	1.8	5.6%	8.2%	1.3	27.6%	43.4%	1.4	2.3%	3.1%	1.2
VANCOUVER 1	34.0%	2.2	0.0%	0.0%	0.0	20.0%	60.5%	2.3	12.0%	15.8%	1.0	14.0%	23.7%	1.3	0.0%	0.0%	0.0
VANCOUVER 2	41.4%	1.8	2.9%	3.8%	1.0	18.6%	37.7%	1.5	0.0%	0.0%	0.0	28.6%	52.8%	1.4	2.9%	5.7%	1.5
VANCOUVER 3	34.8%	2.7	13.6%	51.6%	3.6	6.1%	9.7%	1.5	3.0%	3.2%	1.0	25.8%	30.6%	1.1	4.5%	4.8%	1.0
VANCOUVER 4	67.9%	2.3	17.9%	14.0%	1.2	0.0%	0.0%	0.0	14.3%	18.6%	2.0	53.6%	67.4%	1.9	0.0%	0.0%	0.0

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

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

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-5 – Weighted – Tobacco Point-of-Sale Advertising Indicators – (2004) – Grocery Supermarkets

Table A - 5 Region	Total		Dangler			Poster			C/T Display			Shelf Talker			Other		
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg
NATIONAL	11.2%	3.8	2.7%	14.6%	2.3	3.8%	20.1%	3.1	3.9%	18.6%	1.9	6.4%	39.8%	2.1	1.5%	6.9%	1.9
NATIONAL CORE	11.2%	3.7	2.5%	11.0%	2.2	3.9%	21.0%	2.2	4.0%	19.5%	2.0	6.7%	42.1%	2.6	1.5%	6.4%	1.8
ST. JOHNS	4.2%	1.0	4.2%	100.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
CHARLOTTETOWN	0.0%	0.0	0.0%	0.0%	0.0	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	25.0%	2.6	0.0%	0.0%	0.0	5.0%	7.7%	1.0	10.0%	30.8%	2.0	5.0%	38.5%	5.0	5.0%	23.1%	3.0
NEW BRUNSWICK CORE	26.7%	2.5	0.0%	0.0%	0.0	6.7%	10.0%	1.0	13.3%	40.0%	2.0	6.7%	50.0%	5.0	0.0%	0.0%	0.0
BATHURST	66.7%	2.0	0.0%	0.0%	0.0	33.3%	25.0%	1.0	33.3%	75.0%	3.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
FREDERICTON	20.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	20.0%	100.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
MONCTON	20.0%	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	20.0%	100.0%	3.0
SAINT JOHN	14.3%	5.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	14.3%	100.0%	5.0	0.0%	0.0%	0.0
NOVA SCOTIA	13.6%	1.7	0.0%	0.0%	0.0	0.0%	0.0%	0.0	13.6%	100.0%	1.7	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	27.3%	1.7	0.0%	0.0%	0.0	0.0%	0.0%	0.0	27.3%	100.0%	1.7	0.0%	0.0%	0.0	0.0%	0.0%	0.0
QUEBEC	11.6%	2.6	5.8%	33.3%	1.7	2.6%	10.5%	1.2	3.7%	17.5%	1.4	5.3%	28.1%	1.6	1.6%	10.5%	2.0
CHICOUTIMI/JONQUIERE	47.1%	2.1	11.8%	17.6%	1.5	5.9%	5.9%	1.0	11.8%	23.5%	2.0	29.4%	52.9%	1.8	0.0%	0.0%	0.0
MONTREAL	15.7%	2.9	10.1%	40.0%	1.8	4.5%	12.5%	1.3	5.6%	15.0%	1.2	5.6%	17.5%	1.4	3.4%	15.0%	2.0
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	7.2%	4.3	2.4%	39.1%	5.0	2.4%	23.4%	3.0	1.9%	6.3%	1.0	2.4%	15.6%	2.0	2.9%	15.6%	1.7
ONTARIO CORE	6.3%	4.2	1.1%	21.7%	5.0	2.3%	30.4%	3.5	1.7%	6.5%	1.0	2.3%	19.6%	2.3	3.4%	21.7%	1.7
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	11.1%	4.8	0.0%	0.0%	0.0	6.7%	54.2%	4.3	0.0%	0.0%	0.0	4.4%	12.5%	1.5	11.1%	33.3%	1.6
ST. CATHARINES	20.0%	4.5	15.0%	83.3%	5.0	5.0%	5.0%	1.0	5.0%	5.6%	1.0	5.0%	5.6%	1.0	0.0%	0.0%	0.0
SUDBURY	18.8%	1.3	6.3%	50.0%	2.0	0.0%	0.0%	0.0	12.5%	50.0%	1.0	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	2.9%	6.0	1.0%	44.4%	8.0	1.0%	5.6%	1.0	1.0%	5.6%	1.0	1.9%	33.3%	3.0	1.0%	11.1%	2.0
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	13.6%	4.6	3.4%	5.4%	1.0	3.4%	5.4%	1.0	6.8%	35.1%	3.3	13.6%	54.1%	2.5	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	15.4%	4.6	3.8%	5.4%	1.0	3.8%	5.4%	1.0	7.7%	35.1%	3.3	15.4%	54.1%	2.5	0.0%	0.0%	0.0
SASKATCHEWAN	8.8%	5.3	0.0%	0.0%	0.0	5.9%	87.5%	7.0	0.0%	0.0%	0.0	2.9%	12.5%	2.0	0.0%	0.0%	0.0
REGINA	20.0%	5.3	0.0%	0.0%	0.0	13.3%	87.5%	7.0	0.0%	0.0%	0.0	6.7%	12.5%	2.0	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	23.4%	4.7	1.6%	1.4%	1.0	9.4%	14.9%	1.8	10.2%	20.6%	2.2	21.1%	59.6%	3.1	2.3%	3.5%	1.7
ALBERTA CORE	24.4%	4.7	1.6%	1.4%	1.0	9.8%	14.9%	1.8	10.6%	20.6%	2.2	22.0%	59.6%	3.1	2.4%	3.5%	1.7
CALGARY	6.3%	2.7	0.0%	0.0%	0.0	6.3%	87.5%	2.3	0.0%	0.0%	0.0	2.1%	12.5%	1.0	0.0%	0.0%	0.0
EDMONTON	39.7%	4.9	2.9%	1.5%	1.0	13.2%	10.5%	1.6	19.1%	21.8%	2.2	38.2%	62.4%	3.2	4.4%	3.8%	1.7
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	4.8%	2.1	1.4%	13.3%	1.0	3.4%	73.3%	2.2	0.0%	0.0%	0.0	1.4%	13.3%	1.0	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
CAMPBELL RIVER/COURTNEY	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER CMA	5.9%	2.1	1.7%	13.3%	1.0	4.2%	73.3%	2.2	0.0%	0.0%	0.0	1.7%	13.3%	1.0	0.0%	0.0%	0.0
VANCOUVER 1	10.3%	2.8	0.0%	0.0%	0.0	10.3%	81.8%	2.3	0.0%	0.0%	0.0	5.1%	18.2%	1.0	0.0%	0.0%	0.0
VANCOUVER 2	3.1%	2.0	0.0%	0.0%	0.0	3.1%	100.0%	2.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER 3	2.8%	1.0	2.8%	100.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
VANCOUVER 4	8.3%	1.0	8.3%	100.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0

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

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

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

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-6 – Weighted – Tobacco Point-of-Sale Advertising Indicators – (2004) – Independent Convenience Stores

Table A - 6 Region	Total		Dangler		Poster		C/T Display		Shelf Talker		Other						
	Dist %	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg	Dist %	%	Avg			
NATIONAL	50.6%	3.8	11.8%	14.8%	2.3	23.2%	39.2%	3.1	14.2%	14.6%	1.9	24.0%	26.4%	2.1	5.2%	5.0%	1.9
NATIONAL CORE	48.7%	3.7	9.1%	11.0%	2.4	22.6%	38.8%	3.2	14.7%	16.2%	1.9	24.8%	29.2%	2.1	4.5%	4.8%	1.8
ST. JOHNS	65.6%	3.8	21.1%	9.5%	1.1	58.9%	64.4%	2.7	0.0%	0.0%	0.0	42.2%	26.1%	1.5	0.0%	0.0%	0.0
CHARLOTTETOWN	6.5%	4.5	3.2%	77.8%	7.0	3.2%	11.1%	1.0	0.0%	0.0%	0.0	3.2%	11.1%	1.0	0.0%	0.0%	0.0
NEW BRUNSWICK	60.5%	3.8	16.6%	15.0%	2.1	32.5%	37.2%	2.6	27.4%	29.7%	2.5	15.3%	13.3%	2.0	7.6%	4.7%	1.4
NEW BRUNSWICK CORE	55.3%	3.7	18.7%	19.3%	2.1	31.7%	32.3%	2.1	34.1%	41.7%	2.5	9.8%	5.9%	1.3	1.6%	0.8%	1.0
BATHURST	50.0%	2.5	20.0%	16.0%	1.0	40.0%	64.0%	2.0	0.0%	0.0%	0.0	20.0%	20.0%	1.3	0.0%	0.0%	0.0
FREDERICTON	65.1%	2.9	0.0%	0.0%	0.0	20.9%	17.3%	1.6	44.2%	70.4%	3.0	16.3%	11.1%	1.3	2.3%	1.2%	1.0
MONCTON	79.4%	3.9	8.8%	4.7%	1.7	35.3%	49.1%	4.3	2.9%	0.9%	1.0	35.3%	31.1%	2.8	29.4%	14.2%	1.5
SAINT JOHN	50.0%	4.9	31.7%	30.4%	2.4	36.7%	35.1%	2.4	38.3%	33.1%	2.1	1.7%	0.7%	1.0	1.7%	0.7%	1.0
NOVA SCOTIA	76.6%	3.1	1.9%	1.0%	1.3	44.5%	63.1%	3.4	30.1%	21.1%	1.7	15.8%	14.3%	2.2	1.0%	0.4%	1.0
HALIFAX	71.8%	3.9	2.1%	1.0%	1.3	64.8%	79.1%	3.4	3.5%	1.5%	1.2	23.2%	18.1%	2.2	0.7%	0.3%	1.0
SYDNEY	86.6%	1.8	1.5%	1.0%	1.0	1.5%	1.9%	2.0	86.6%	96.2%	1.7	0.0%	0.0%	0.0	1.5%	1.0%	1.0
QUEBEC	39.7%	3.4	8.8%	9.0%	1.4	6.9%	2.5%	4.0	11.4%	17.9%	2.1	29.0%	51.2%	2.4	1.6%	1.4%	1.2
CHICOUTIMI/JONQUIERE	69.7%	2.3	31.8%	29.0%	1.5	4.5%	3.7%	1.3	7.6%	8.4%	1.8	51.5%	57.9%	1.8	1.5%	0.9%	1.0
MONTRÉAL	30.1%	2.5	8.4%	11.3%	1.0	7.2%	24.2%	2.5	10.8%	19.4%	1.3	20.5%	37.1%	1.4	4.8%	8.1%	1.3
QUEBEC CITY	16.9%	4.8	0.0%	0.0%	0.0	1.6%	9.9%	5.0	0.0%	0.0%	0.0	16.9%	90.1%	4.3	0.0%	0.0%	0.0
SHERBROOKE	77.3%	4.5	0.0%	0.0%	0.0	25.0%	37.7%	5.3	50.0%	35.7%	2.5	45.5%	26.6%	2.1	0.0%	0.0%	0.0
ONTARIO	55.2%	4.8	23.9%	30.2%	3.4	27.5%	38.5%	3.8	11.5%	7.6%	1.8	19.8%	13.8%	1.9	13.5%	9.9%	2.0
ONTARIO CORE	50.8%	5.2	15.2%	22.2%	3.8	28.4%	38.2%	3.5	11.2%	7.4%	1.8	24.4%	19.0%	2.0	17.2%	13.2%	2.0
KINGSTON	60.6%	5.6	0.0%	0.0%	0.0	45.5%	66.1%	4.9	18.2%	14.3%	2.7	18.2%	8.0%	1.5	21.2%	11.6%	1.9
OTTAWA	83.0%	7.2	3.8%	0.6%	1.0	60.4%	56.5%	5.6	0.0%	0.0%	0.0	54.7%	18.7%	2.0	67.9%	24.1%	2.1
ST. CATHARINES	70.4%	2.1	53.1%	73.3%	2.0	11.1%	7.5%	1.0	12.3%	11.7%	1.4	6.2%	4.2%	1.0	3.7%	3.3%	1.3
SUBBURY	53.8%	1.2	12.8%	19.2%	1.0	7.7%	11.5%	1.0	30.8%	61.5%	1.3	2.6%	3.8%	1.0	2.6%	3.8%	1.0
THUNDER BAY	44.8%	12.3	44.8%	51.9%	6.4	44.8%	43.8%	5.4	3.4%	0.6%	1.0	20.7%	3.8%	1.0	0.0%	0.0%	0.0
TORONTO	46.7%	6.1	25.7%	44.5%	4.9	25.7%	20.1%	2.2	15.2%	11.0%	2.1	27.6%	21.1%	2.2	5.7%	3.3%	1.7
WINDSOR	24.5%	1.5	7.5%	31.6%	1.5	17.0%	57.9%	1.2	0.0%	0.0%	0.0	3.8%	10.5%	1.0	0.0%	0.0%	0.0
MANITOBA	64.2%	3.8	14.8%	7.2%	1.2	14.8%	13.3%	2.2	23.5%	21.5%	2.2	49.4%	46.7%	2.3	13.6%	11.3%	2.0
BRANDON	100.0%	2.2	44.4%	20.0%	1.0	100.0%	65.0%	1.4	0.0%	0.0%	0.0	33.3%	15.0%	1.0	0.0%	0.0%	0.0
WINNIPEG	59.7%	4.1	11.1%	5.7%	1.3	4.2%	7.4%	4.3	26.4%	24.0%	2.2	51.4%	50.3%	2.4	15.3%	12.6%	2.0
SASKATCHEWAN	54.5%	5.6	3.6%	1.8%	1.5	40.0%	57.5%	4.4	18.2%	7.8%	1.3	49.1%	32.9%	2.0	0.0%	0.0%	0.0
REGINA	40.0%	5.6	0.0%	0.0%	0.0	20.0%	69.6%	7.8	4.0%	3.6%	2.0	28.0%	26.8%	2.1	0.0%	0.0%	0.0
SASKATOON	66.7%	5.6	6.7%	2.7%	1.5	56.7%	51.4%	3.4	30.0%	9.9%	1.2	66.7%	36.0%	2.0	0.0%	0.0%	0.0
ALBERTA	50.7%	3.2	6.8%	6.7%	1.6	16.9%	19.2%	1.8	13.5%	16.7%	2.0	35.8%	55.0%	2.5	2.0%	2.5%	2.0
ALBERTA CORE	48.9%	3.2	3.0%	2.4%	1.3	14.8%	15.8%	1.7	14.8%	19.1%	2.0	36.3%	59.8%	2.6	2.2%	2.9%	2.0
CALGARY	56.5%	3.1	1.4%	0.8%	1.0	17.4%	17.5%	1.8	13.0%	12.5%	1.7	46.4%	69.2%	2.6	0.0%	0.0%	0.0
EDMONTON	50.0%	3.6	6.3%	4.7%	1.3	10.4%	10.5%	1.8	22.9%	29.1%	2.3	35.4%	48.8%	2.5	6.3%	7.0%	2.0
MEDICINE HAT	16.7%	1.0	0.0%	0.0%	0.0	16.7%	100.0%	1.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
RED DEER	69.2%	3.4	46.2%	35.5%	1.8	38.5%	41.9%	2.6	0.0%	0.0%	0.0	30.8%	22.6%	1.8	0.0%	0.0%	0.0
BRITISH COLUMBIA	28.5%	2.1	4.9%	12.1%	1.5	9.2%	31.9%	2.1	5.6%	14.3%	1.5	14.1%	36.3%	1.5	2.0%	5.5%	1.7
KELOWNA	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0	0.0%	0.0%	0.0
CAMPBELL RIVER/COURTNAY	29.0%	2.2	0.0%	0.0%	0.0	16.1%	55.0%	2.2	3.2%	10.0%	2.0	9.7%	30.0%	2.0	3.2%	5.0%	1.0
VANCOUVER CMA	30.2%	2.1	5.8%	13.6%	1.5	8.9%	29.0%	2.0	6.2%	14.8%	1.5	15.5%	37.0%	1.5	1.9%	5.6%	1.8
VANCOUVER 1	22.0%	2.3	0.0%	0.0%	0.0	13.4%	64.3%	2.5	7.3%	23.8%	1.7	3.7%	9.5%	1.3	1.2%	2.4%	1.0
VANCOUVER 2	21.5%	1.8	0.0%	0.0%	0.0	9.2%	32.0%	1.3	0.0%	0.0%	0.0	12.3%	48.0%	1.5	3.1%	20.0%	2.5
VANCOUVER 3	34.9%	2.2	14.3%	29.2%	1.6	9.5%	25.0%	2.0	3.2%	4.2%	1.0	22.2%	41.7%	1.4	0.0%	0.0%	0.0
VANCOUVER 4	50.0%	2.0	12.5%	17.0%	1.3	0.0%	0.0%	0.0	16.7%	25.5%	1.5	31.3%	51.1%	1.6	4.2%	6.4%	1.5

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

Vancouver 1: Vancouver, Richmond
 Vancouver 2: Burnaby, Coquitlam, Port Moody, Port Coquitlam, Maple Ridge, Whonnock, Pitt Meadows, New Westminster
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 Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

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

Table A-7 – Weighted – Tobacco Point-of-Sale Advertising in Chain Convenience Stores (2004) –All Ads

Table A-7 Region	Belvedere		Benson & Hedges		Canadian Classics		du Maurier		Export A		Export A Smooth		Remaining Export A		Matinee		Players		Rothmans		Sportsman		Other		
	% 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	8.2%	3.3%	15.4%	8.7%	8.5%	3.3%	44.5%	27.5%	10.7%	10.1%	1.9%	1.0%	2.1%	0.9%	22.0%	10.4%	18.8%	9.4%	2.0%	1.1%	0.5%	0.2%	29.8%	24.1%	
NATIONAL CORE	4.4%	2.4%	15.0%	8.8%	5.8%	3.1%	41.6%	26.5%	18.2%	10.0%	1.8%	1.0%	2.3%	1.0%	21.4%	10.4%	18.0%	9.3%	1.8%	1.1%	0.6%	0.2%	31.1%	26.1%	
ST. JOHNS	0.0%	0.0%	29.4%	6.1%	0.0%	0.0%	100.0%	28.3%	88.2%	22.2%	0.0%	0.0%	0.0%	0.0%	82.4%	14.1%	5.0%	2.0%	5.9%	1.0%	0.0%	0.0%	82.4%	26.3%	
CHARLOTTETOWN	0.0%	0.0%	9.1%	88.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
NEW BRUNSWICK	27.6%	12.6%	34.5%	10.7%	3.4%	8.7%	65.5%	29.1%	13.5%	5.8%	0.0%	0.0%	10.3%	2.9%	31.0%	10.7%	20.7%	11.7%	3.4%	2.9%	0.0%	0.0%	17.2%	4.9%	
NEW BRUNSWICK CORE	31.3%	13.3%	18.8%	6.7%	6.3%	15.0%	50.0%	21.7%	12.5%	6.7%	0.0%	0.0%	18.8%	5.0%	25.0%	6.7%	25.0%	16.7%	0.0%	5.0%	0.0%	0.0%	12.5%	3.3%	
BATHURST	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FREDERICTON	14.3%	10.0%	0.0%	0.0%	0.0%	0.0%	42.9%	30.0%	0.0%	0.0%	0.0%	0.0%	42.9%	30.0%	14.3%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	28.6%	20.0%	
MONCTON	23.1%	11.6%	53.8%	16.3%	0.0%	0.0%	84.6%	39.5%	15.4%	4.7%	0.0%	0.0%	0.0%	0.0%	38.5%	16.3%	15.4%	4.7%	0.0%	0.0%	0.0%	0.0%	23.1%	7.0%	
SAINT JOHN	44.4%	14.0%	33.3%	8.0%	11.1%	18.0%	55.6%	20.0%	22.2%	8.0%	0.0%	0.0%	0.0%	0.0%	33.3%	6.0%	44.4%	20.0%	11.1%	6.0%	0.0%	0.0%	0.0%	0.0%	
NOVA SCOTIA	33.3%	16.7%	31.0%	11.8%	2.4%	0.8%	45.2%	19.0%	23.8%	7.9%	0.0%	0.0%	0.0%	0.0%	35.7%	13.5%	21.4%	11.9%	2.4%	0.8%	0.0%	0.0%	28.6%	17.5%	
HALIFAX	30.0%	15.8%	29.7%	9.9%	3.3%	1.0%	43.3%	16.8%	30.0%	9.9%	0.0%	0.0%	0.0%	0.0%	43.3%	14.9%	23.3%	12.0%	0.0%	0.0%	0.0%	0.0%	35.7%	19.8%	
SYDNEY	41.7%	20.0%	41.7%	20.0%	0.0%	0.0%	50.0%	28.0%	8.3%	4.0%	0.0%	0.0%	0.0%	0.0%	16.7%	8.0%	16.7%	8.0%	8.3%	4.0%	0.0%	0.0%	8.3%	8.0%	
QUEBEC	7.8%	3.8%	18.5%	12.1%	1.1%	0.5%	35.9%	24.5%	26.6%	16.2%	3.3%	2.1%	1.1%	0.7%	13.6%	8.6%	22.3%	12.8%	1.1%	0.7%	0.8%	0.2%	21.2%	18.1%	
CHICOUTIMI/AUJONQUIERE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	15.4%	50.0%	25.9%	0.0%	0.0%	8.3%	7.7%	8.3%	7.7%	75.0%	38.5%	0.0%	0.0%	0.0%	0.0%	8.3%	3.8%	
MONTREAL	7.1%	3.8%	23.5%	12.7%	1.0%	0.5%	39.8%	25.9%	26.5%	16.0%	5.1%	4.2%	1.0%	0.5%	13.3%	9.0%	18.4%	11.8%	1.0%	0.9%	1.0%	0.5%	17.3%	14.2%	
QUEBEC CITY	1.8%	1.3%	17.9%	20.1%	0.0%	0.0%	17.9%	24.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%	10.1%	8.9%	11.4%	0.0%	0.0%	0.0%	0.0%	14.3%	24.1%	
SHERBROOKE	33.3%	5.8%	5.6%	1.0%	5.6%	1.0%	77.8%	24.0%	94.4%	26.0%	0.0%	0.0%	0.0%	0.0%	38.9%	6.7%	50.0%	9.6%	5.6%	1.0%	0.0%	0.0%	7.2%	25.0%	
ONTARIO	8.8%	2.9%	19.5%	9.5%	12.1%	4.7%	49.8%	30.9%	25.1%	11.1%	1.5%	0.7%	0.9%	0.4%	25.7%	10.2%	23.2%	9.4%	3.7%	1.8%	0.6%	0.2%	25.1%	18.3%	
ONTARIO CORE	0.9%	0.3%	21.9%	10.6%	11.4%	4.6%	43.8%	30.0%	24.2%	10.7%	0.9%	0.4%	0.9%	0.3%	26.5%	10.6%	19.6%	8.7%	5.0%	2.0%	0.5%	0.3%	28.3%	21.4%	
KINGSTON	0.0%	0.0%	33.3%	7.8%	27.8%	5.9%	83.3%	25.5%	38.9%	9.8%	0.0%	0.0%	0.0%	0.0%	55.6%	10.8%	61.1%	10.8%	11.1%	2.0%	0.0%	0.0%	50.0%	27.5%	
OTTAWA	0.0%	0.0%	58.8%	10.6%	31.4%	5.1%	80.4%	25.8%	74.5%	14.1%	2.0%	0.3%	0.0%	0.0%	72.9%	12.1%	41.2%	7.9%	9.8%	1.3%	0.0%	0.0%	62.7%	23.5%	
ST. CATHARINES	10.4%	13.0%	4.2%	1.9%	9.7%	5.2%	61.1%	45.5%	20.9%	10.4%	2.8%	1.9%	0.0%	0.0%	12.5%	6.5%	20.9%	9.7%	1.4%	0.6%	0.0%	0.0%	11.1%	5.2%	
SUDBURY	0.0%	0.0%	6.7%	9.1%	0.0%	0.0%	13.3%	18.2%	20.0%	27.3%	0.0%	0.0%	0.0%	0.0%	20.0%	27.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.3%	18.2%	
THUNDER BAY	42.9%	10.7%	42.9%	17.3%	14.3%	2.7%	42.9%	16.0%	42.9%	17.3%	7.1%	1.3%	7.1%	2.7%	42.9%	13.3%	42.9%	13.3%	7.1%	1.3%	0.0%	0.0%	14.3%	4.0%	
TORONTO	1.0%	0.4%	11.8%	9.6%	6.9%	3.8%	47.1%	36.5%	9.6%	4.6%	1.0%	0.8%	2.0%	0.8%	16.7%	8.1%	20.6%	11.5%	2.9%	3.5%	2.0%	0.8%	25.9%	19.6%	
WINDSOR	2.0%	4.3%	9.8%	21.7%	3.9%	8.7%	9.8%	34.8%	3.9%	13.0%	0.0%	0.0%	0.0%	0.0%	2.0%	4.3%	2.0%	4.3%	0.0%	0.0%	0.0%	0.0%	3.9%	8.7%	
MANITOBA	0.0%	0.0%	1.6%	0.7%	1.6%	0.7%	49.2%	22.0%	6.6%	2.7%	3.3%	1.3%	8.2%	3.3%	18.4%	8.0%	19.7%	9.3%	1.6%	0.7%	0.0%	0.0%	70.5%	51.3%	
BRANDON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	50.0%	
WINNIPEG	0.0%	0.0%	0.7%	1.8%	0.7%	1.8%	50.9%	21.6%	7.0%	2.7%	3.5%	1.4%	8.8%	3.4%	17.6%	8.1%	21.1%	8.5%	1.8%	0.7%	0.0%	0.0%	73.7%	51.4%	
SASKATCHEWAN	0.0%	0.0%	15.9%	9.6%	11.4%	4.1%	36.1%	11.6%	11.4%	3.4%	0.0%	0.0%	2.3%	0.7%	4.5%	2.1%	27.3%	8.9%	2.3%	0.7%	0.0%	0.0%	45.0%	38.9%	
REGINA	0.0%	0.0%	5.0%	1.2%	15.0%	4.9%	40.0%	11.0%	5.0%	1.2%	0.0%	0.0%	0.0%	0.0%	50.0%	13.4%	5.0%	1.2%	0.0%	0.0%	0.0%	0.0%	35.0%	67.1%	
SASKATOON	0.0%	0.0%	25.0%	20.3%	8.3%	3.1%	29.2%	12.5%	16.7%	6.3%	0.0%	0.0%	4.2%	1.6%	8.3%	4.7%	8.3%	3.1%	0.0%	0.0%	0.0%	0.0%	54.0%	48.4%	
ALBERTA	1.6%	1.4%	10.2%	4.9%	6.5%	2.8%	52.7%	31.9%	12.0%	8.7%	2.7%	1.2%	3.2%	1.4%	31.7%	16.2%	15.6%	7.9%	0.5%	0.2%	1.1%	0.5%	32.6%	25.0%	
ALBERTA CORE	1.7%	1.4%	10.6%	5.1%	6.7%	2.9%	52.2%	32.0%	12.9%	8.7%	2.8%	1.2%	3.3%	1.4%	31.7%	16.4%	16.1%	8.2%	0.0%	0.2%	0.0%	0.5%	31.7%	23.9%	
CALGARY	0.0%	0.0%	4.4%	2.0%	1.1%	0.5%	64.4%	37.1%	8.9%	4.1%	3.3%	1.5%	3.3%	1.5%	22.2%	10.7%	7.8%	3.6%	1.1%	0.5%	2.2%	1.0%	44.4%	37.6%	
EDMONTON	3.5%	2.8%	17.6%	7.8%	12.9%	5.0%	42.4%	27.5%	17.6%	9.2%	2.4%	0.9%	3.5%	1.4%	43.5%	21.6%	25.9%	12.4%	0.0%	0.0%	0.0%	0.0%	20.0%	11.5%	
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%	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%	66.7%	29.4%	16.7%	5.9%	0.0%	0.0%	0.0%	0.0%	33.3%	11.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	66.7%	52.9%
BRITISH COLUMBIA	1.0%	1.2%	1.0%	1.2%	3.8%	7.0%	20.0%	29.1%	4.8%	7.0%	1.0%	2.3%	1.0%	1.2%	2.8%	3.8%	1.9%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	22.9%	45.3%
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%	
CAMPBELL RIVER/COURTNEY	0.0%	0.0%	0.0%	0.0%	12.5%	11.1%	12.5%	11.1%	12.5%	22.2%	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.0%	44.4%
VANCOUVER CMA	1.1%	1.3%	1.1%	1.3%	3.4%	6.5%	22.5%	31.2%	4.5%	6.2%	1.1%	2.6%	1.1%	1.3%	3.4%	3.9%	1.1%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	24.7%	45.5%
VANCOUVER 1	0.0%	0.0%	2.8%	3.3%	2.8%	3.3%	13.9%	23.3%	5.6%	6.7%	0.0%	0.0%	0.0%	0.0%	2.8%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.4%	60.0%
VANCOUVER 2	3.8%	5.0%	0.0%	0.0%	0.0%	0.0%	23.1%	30.0%	3.8%	5.0%	0.0%	0.0%	3.8%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	38.5%	55.0%
VANCOUVER 3	0.0%	0.0%	0.0%	0.0%	9.1%	21.1%	27.3%	36.8%	0.0%	0.0%	4.5%	10.5%	0.0%	0.0%	4.5%	5.3%	4.5%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	13.6%	21.1%
VANCOUVER 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	60.0%	50.0%	20.0%	12.5%	0.0%	0.0%	0.0%	0.0%	20.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.0%	25.0%

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

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

Brand Shr = brand's share of all ads

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-8 – Weighted – Tobacco Point-of-Sale Advertising in Gas Stations/Kiosks (2004) –All Ads

Table A-8 Region	Belvedere		Benson & Hedges		Canadian Classics		du Maurier		Export A		Export A Smooth		Remaining Export A		Matinee		Players		Rothmans		Sportsman		Other	
	% 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	5.6%	4.1%	15.3%	10.5%	6.4%	4.1%	29.7%	23.4%	15.1%	10.3%	1.7%	1.2%	2.1%	1.6%	13.2%	9.0%	11.7%	8.1%	1.9%	1.2%	0.3%	0.1%	24.3%	28.3%
NATIONAL CORE	5.3%	4.0%	15.4%	10.8%	6.0%	3.9%	29.3%	23.1%	15.0%	10.0%	1.8%	1.2%	2.0%	1.6%	12.5%	8.5%	0.0%	7.4%	1.6%	1.0%	0.3%	0.2%	25.2%	28.2%
ST. JOHNS	2.3%	0.7%	9.1%	2.7%	2.3%	0.7%	77.3%	30.7%	58.8%	24.0%	0.0%	0.0%	0.0%	0.0%	22.7%	6.7%	2.3%	0.7%	2.3%	0.7%	0.0%	0.0%	77.3%	33.3%
CHARLOTTETOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	19.7%	10.6%	11.3%	5.1%	4.2%	1.5%	46.5%	25.3%	11.3%	4.5%	1.4%	0.9%	9.9%	3.5%	29.6%	16.7%	19.7%	13.1%	1.4%	0.5%	0.0%	0.0%	32.4%	18.7%
NEW BRUNSWICK CORE	23.4%	13.7%	10.6%	5.3%	4.3%	1.5%	48.9%	22.1%	10.6%	4.6%	2.1%	0.8%	12.8%	4.6%	29.8%	14.5%	17.0%	12.2%	0.0%	0.8%	0.0%	0.0%	31.9%	19.8%
BATHURST	7.7%	7.7%	7.7%	3.8%	0.0%	0.0%	23.1%	19.2%	7.7%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	53.8%	61.5%
FREDERICTON	10.5%	5.3%	0.0%	0.0%	10.5%	5.3%	47.4%	23.7%	5.3%	2.6%	0.0%	0.0%	31.6%	15.8%	31.6%	19.4%	5.3%	2.6%	5.3%	2.6%	0.0%	0.0%	21.5%	15.9%
MONCTON	12.5%	4.5%	12.5%	4.5%	4.2%	1.5%	41.7%	31.3%	12.5%	4.5%	0.0%	0.0%	4.2%	1.5%	29.2%	20.9%	25.0%	14.9%	0.0%	0.0%	0.0%	0.0%	33.3%	16.4%
SANT JOHN	53.3%	20.9%	26.7%	9.0%	0.0%	0.0%	73.3%	22.4%	20.0%	4.5%	6.7%	1.5%	0.0%	0.0%	53.3%	17.9%	46.7%	22.4%	0.0%	0.0%	0.0%	0.0%	6.7%	1.6%
NOVA SCOTIA	30.1%	16.8%	18.4%	9.7%	3.9%	2.4%	25.2%	15.0%	37.9%	21.3%	4.9%	3.4%	0.0%	0.0%	16.5%	9.2%	16.5%	8.2%	1.0%	0.5%	0.0%	0.0%	17.5%	13.5%
HALIFAX	26.2%	15.9%	20.0%	9.8%	6.2%	3.8%	23.1%	15.2%	38.4%	20.5%	7.7%	5.3%	0.0%	0.0%	16.9%	9.1%	9.2%	4.5%	0.0%	0.0%	0.0%	0.0%	21.5%	15.9%
SYDNEY	38.8%	18.7%	15.8%	9.3%	0.0%	0.0%	28.9%	14.7%	42.1%	22.7%	0.0%	0.0%	0.0%	0.0%	15.8%	9.3%	28.9%	14.7%	2.6%	1.3%	0.0%	0.0%	10.5%	9.3%
QUEBEC	8.4%	9.4%	8.6%	9.1%	1.7%	1.7%	15.5%	18.1%	14.6%	14.8%	1.7%	2.3%	3.9%	4.4%	7.7%	7.0%	14.6%	15.4%	2.1%	1.7%	0.9%	0.7%	12.0%	15.4%
CHICOUTIMI/NOUQUEE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.4%	23.3%	32.3%	27.9%	0.0%	0.0%	9.7%	11.6%	0.5%	4.7%	22.6%	20.9%	0.0%	0.0%	0.0%	0.0%	12.9%	11.6%
MONTREAL	5.3%	7.0%	16.0%	16.4%	4.3%	3.9%	18.0%	16.4%	10.8%	10.2%	3.2%	4.7%	3.2%	3.9%	6.4%	4.7%	18.1%	20.3%	2.1%	1.6%	2.1%	1.8%	8.5%	9.4%
QUEBEC CITY	2.6%	25.0%	3.8%	16.7%	0.0%	0.0%	3.8%	16.7%	1.3%	4.2%	0.0%	0.0%	1.3%	12.5%	3.8%	20.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	4.2%
SHERBROOKE	26.7%	12.6%	6.7%	1.9%	0.0%	0.0%	40.0%	18.4%	43.3%	17.5%	3.3%	1.0%	0.0%	0.0%	23.3%	7.8%	33.3%	10.7%	10.0%	2.9%	0.0%	0.0%	50.0%	27.2%
CHICOUTIMI/NOUQUEE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.4%	23.3%	32.3%	27.9%	0.0%	0.0%	9.7%	11.6%	0.5%	4.7%	22.6%	20.9%	0.0%	0.0%	0.0%	0.0%	12.9%	11.6%
ONTARIO CORE	1.6%	1.1%	22.3%	12.9%	5.7%	4.0%	38.1%	28.8%	19.0%	10.6%	2.0%	1.1%	2.0%	0.9%	16.2%	11.0%	8.1%	4.0%	0.0%	1.1%	0.0%	0.0%	27.9%	24.6%
KINGSTON	0.0%	0.0%	19.0%	13.2%	9.5%	7.9%	19.0%	13.2%	19.0%	18.4%	0.0%	0.0%	0.0%	0.0%	23.8%	13.2%	4.8%	2.6%	0.0%	0.0%	0.0%	0.0%	23.8%	31.6%
OTTAWA	0.0%	0.0%	46.2%	11.5%	16.9%	5.6%	69.2%	24.5%	49.2%	13.7%	0.0%	0.0%	0.0%	0.0%	38.5%	9.3%	15.4%	3.4%	3.1%	0.8%	0.0%	0.0%	66.2%	31.4%
ST. CATHARINES	1.9%	2.8%	1.9%	2.8%	7.4%	10.6%	29.6%	57.9%	1.9%	6.3%	1.9%	2.8%	0.0%	0.0%	3.7%	5.9%	5.6%	7.8%	0.0%	0.0%	0.0%	0.0%	3.7%	5.9%
SUBURY	0.0%	0.0%	2.9%	9.1%	0.0%	0.0%	8.6%	27.3%	8.6%	27.3%	0.0%	0.0%	0.0%	0.0%	2.9%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.6%	27.3%
THUNDER BAY	28.6%	6.8%	32.1%	8.9%	25.0%	6.2%	53.6%	19.2%	46.4%	17.1%	3.6%	0.7%	14.3%	2.7%	42.9%	11.0%	53.6%	19.2%	25.0%	6.2%	0.0%	0.0%	7.1%	2.1%
TORONTO	3.9%	2.7%	22.5%	14.9%	2.8%	1.8%	45.1%	35.3%	11.9%	5.4%	4.9%	2.7%	4.9%	2.3%	13.7%	13.6%	9.8%	5.0%	2.9%	1.8%	0.0%	0.0%	21.6%	14.5%
WINDSOR	0.0%	0.0%	2.2%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	50.0%
MANITOBA	2.2%	0.0%	20.9%	9.5%	6.8%	2.6%	56.0%	32.9%	5.5%	2.2%	2.2%	0.9%	4.4%	4.8%	8.8%	4.3%	11.0%	4.3%	0.0%	0.0%	1.1%	0.4%	52.7%	37.2%
BRANDON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	52.9%	34.6%	5.9%	3.8%	0.0%	0.0%	0.0%	0.0%	5.9%	3.8%	41.2%	26.9%	0.0%	0.0%	5.9%	3.8%	35.3%	26.9%
WINNIPEG	2.7%	1.0%	25.7%	10.7%	9.1%	2.9%	56.8%	32.7%	8.4%	2.0%	2.7%	1.0%	5.4%	5.4%	9.5%	4.4%	4.1%	1.5%	0.0%	0.0%	0.0%	0.0%	56.8%	38.5%
SASKATCHEWAN	2.6%	0.8%	41.4%	14.5%	25.0%	6.5%	40.5%	11.7%	19.8%	5.0%	0.9%	0.2%	0.9%	0.2%	29.3%	7.5%	27.6%	6.9%	3.4%	1.0%	0.9%	0.2%	51.7%	45.9%
REGINA	0.0%	0.0%	5.9%	1.7%	3.9%	1.2%	27.5%	8.1%	2.0%	0.6%	0.0%	0.0%	0.0%	0.0%	2.0%	0.6%	15.7%	4.6%	2.0%	1.2%	2.0%	0.6%	35.3%	81.5%
SASKATOON	4.6%	1.0%	69.2%	21.7%	41.5%	9.5%	50.8%	13.8%	33.8%	7.6%	1.5%	0.3%	1.5%	0.3%	50.8%	11.5%	36.9%	8.2%	4.6%	1.0%	0.0%	0.0%	64.6%	26.0%
ALBERTA	1.1%	0.9%	11.8%	10.7%	4.9%	4.2%	22.5%	29.0%	7.1%	6.5%	1.8%	1.4%	1.1%	0.9%	7.7%	7.5%	9.3%	10.7%	2.2%	1.9%	0.0%	0.0%	19.8%	26.2%
ALBERTA CORE	1.2%	1.0%	10.5%	10.1%	4.7%	4.0%	23.4%	30.2%	7.0%	6.5%	1.8%	1.5%	1.2%	1.0%	7.0%	7.0%	9.4%	11.1%	0.0%	2.0%	0.0%	0.0%	18.7%	25.6%
CALGARY	1.3%	1.1%	15.6%	13.7%	3.9%	3.2%	26.0%	27.4%	6.5%	6.3%	0.0%	0.0%	1.3%	1.1%	2.6%	2.1%	5.2%	5.3%	2.6%	2.1%	0.0%	0.0%	31.2%	37.9%
EDMONTON	1.4%	1.0%	8.6%	7.1%	7.1%	5.1%	27.1%	33.7%	8.6%	6.1%	4.3%	3.1%	1.4%	1.0%	12.9%	11.2%	12.9%	14.3%	2.9%	2.0%	0.0%	0.0%	11.4%	15.3%
MEDICINE HAT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	16.7%	4.2%	16.7%	0.0%	0.0%	0.0%	0.0%	4.2%	16.7%	12.5%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
RED DEER	0.0%	0.0%	27.3%	20.0%	9.1%	6.7%	9.1%	13.3%	9.1%	6.7%	0.0%	0.0%	0.0%	0.0%	18.2%	13.3%	9.1%	6.7%	0.0%	0.0%	0.0%	0.0%	36.4%	33.3%
BRITISH COLUMBIA	1.1%	1.9%	7.5%	11.8%	4.6%	7.5%	16.7%	26.9%	5.0%	7.1%	1.1%	1.4%	0.7%	0.9%	6.0%	9.0%	3.9%	7.1%	6.4%	0.9%	0.0%	0.0%	13.9%	25.5%
KELOWNA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	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%
CAMPBELL RIVER/COURTNAV	4.2%	7.1%	4.2%	14.3%	4.2%	7.1%	12.5%	21.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	7.1%	12.5%	21.4%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	21.4%
VANCOUVER CMA	0.9%	1.8%	9.3%	11.7%	5.6%	7.7%	20.1%	26.5%	6.5%	7.7%	1.4%	1.9%	0.9%	1.0%	7.6%	9.2%	3.7%	6.1%	0.5%	1.0%	0.0%	0.0%	16.8%	26.0%
VANCOUVER 1	0.0%	0.0%	8.0%	10.5%	0.0%	0.0%	12.0%	21.1%	4.0%	5.3%	0.0%	0.0%	0.0%	0.0%	4.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.0%	57.9%
VANCOUVER 2	1.4%	1.9%	5.7%	7.5%	0.0%	0.0%	25.7%	41.5%	5.7%	7.5%	1.4%	1.9%	0.0%	0.0%	8.6%	11.3%	2.9%	3.8%	0.0%	0.0%	0.0%	0.0%	15.7%	24.5%
VANCOUVER 3	1.5%	3.2%	1.5%	1.6%	18.2%	24.2%	15.2%	19.4%	7.6%	9.7%	3.0%	3.2%	3.0%	3.2%	6.1%	9.7%	9.1%	16.1%	1.5%	3.2%	0.0%	0.0%	4.5%	6.5%
VANCOUVER 4	0.0%	0.0%	39.3%	32.6%	0.0%	0.0%	32.1%	23.3%	10.7%	7.0%	0.0%	0.0%	0.0%	0.0%	14.3%	9.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	35.7%	27.9%

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

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

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-9 – Weighted – Tobacco Point-of-Sale Advertising in Independent Convenience Stores (2004) – All Ads

Region	Belvedere		Benson & Hedges		Canadian Classics		du Maurier		Export A		Export A Smooth		Remaining Export A		Matinee		Players		Rothmans		Sportsman		Other		
	% 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	8.2%	5.7%	13.4%	10.2%	6.7%	4.7%	26.3%	20.2%	17.4%	11.9%	1.6%	1.0%	2.1%	1.5%	15.5%	10.5%	13.8%	9.1%	2.1%	1.6%	0.5%	0.4%	23.2%	23.2%	
NATIONAL CORE	7.4%	5.5%	12.2%	9.7%	5.9%	4.5%	24.5%	20.0%	16.4%	11.5%	1.5%	1.0%	2.0%	1.5%	14.5%	10.3%	0.0%	8.9%	1.7%	1.5%	0.6%	0.5%	23.2%	26.1%	
ST. JOHNS	1.1%	0.5%	11.1%	4.5%	1.1%	0.5%	57.8%	32.0%	51.1%	27.5%	0.0%	0.0%	0.0%	0.0%	17.8%	7.2%	0.0%	0.0%	1.1%	0.5%	1.1%	0.5%	40.0%	27.0%	
CHARLOTTETOWN	3.2%	22.2%	3.2%	11.1%	3.2%	22.2%	3.2%	11.1%	3.2%	11.1%	0.0%	0.0%	0.0%	0.0%	3.2%	11.1%	3.2%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
NEW BRUNSWICK	10.1%	15.6%	19.7%	11.9%	3.2%	1.0%	32.5%	19.7%	12.1%	7.2%	0.6%	0.3%	8.3%	3.6%	23.6%	13.3%	15.3%	11.9%	1.9%	0.8%	3.2%	2.2%	16.5%	11.4%	
NEW BRUNSWICK CORE	20.3%	20.1%	17.9%	12.2%	1.6%	0.8%	29.3%	17.7%	5.7%	3.1%	0.8%	0.4%	10.6%	5.1%	22.0%	13.4%	13.0%	11.4%	0.0%	1.2%	0.0%	3.1%	15.4%	11.4%	
BATHURS	0.0%	0.0%	10.0%	12.0%	0.0%	0.0%	15.0%	16.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	4.0%	0.0%	0.0%	5.0%	4.0%	20.0%	28.0%	20.0%	36.0%	
FREDERICTON	16.3%	8.6%	4.7%	2.5%	4.7%	2.5%	34.9%	10.8%	9.3%	4.9%	2.3%	1.2%	30.2%	16.0%	27.9%	14.8%	7.0%	3.7%	4.7%	2.5%	2.3%	1.2%	32.6%	22.2%	
MONCTON	14.7%	4.7%	26.5%	11.3%	8.8%	4.7%	44.1%	24.5%	35.3%	17.0%	0.0%	0.0%	0.0%	0.0%	29.4%	13.2%	23.5%	13.2%	0.0%	0.0%	0.0%	0.0%	29.4%	11.3%	
SANT JOHN	30.0%	29.7%	30.0%	17.6%	0.0%	0.0%	30.0%	16.9%	5.0%	2.7%	0.0%	0.0%	0.0%	0.0%	23.3%	14.2%	21.7%	17.6%	0.0%	0.0%	0.0%	0.0%	1.7%	1.4%	
NOVA SCOTIA	31.1%	14.7%	16.7%	7.8%	4.3%	1.8%	32.1%	16.9%	32.5%	15.5%	2.4%	1.4%	1.0%	0.4%	19.1%	9.8%	33.0%	17.1%	0.0%	0.0%	0.0%	0.0%	23.4%	14.5%	
HALIFAX	31.0%	13.3%	21.8%	8.5%	6.3%	2.3%	35.9%	17.3%	30.3%	13.1%	2.8%	1.3%	1.4%	0.5%	21.8%	10.1%	33.1%	16.1%	0.0%	0.0%	0.0%	0.0%	32.4%	17.6%	
SYDNEY	31.3%	20.2%	6.0%	4.8%	0.0%	0.0%	23.9%	15.4%	37.3%	25.0%	1.5%	1.9%	0.0%	0.0%	13.4%	8.7%	32.8%	21.2%	0.0%	0.0%	0.0%	0.0%	4.5%	2.9%	
QUEBEC	5.4%	4.2%	9.5%	9.9%	0.9%	0.9%	14.2%	17.2%	15.5%	15.8%	2.2%	1.9%	2.5%	3.3%	8.5%	7.3%	13.2%	10.6%	1.3%	0.0%	0.0%	0.0%	17.0%	27.8%	
CHICOUTIMI/JONQUIERE	1.5%	0.9%	1.5%	0.9%	1.5%	0.9%	18.2%	15.0%	30.3%	21.5%	1.5%	1.9%	7.6%	8.3%	10.6%	6.5%	33.3%	21.5%	0.0%	0.0%	0.0%	0.0%	19.7%	21.5%	
MONTREAL	7.2%	8.7%	10.8%	14.5%	2.4%	4.8%	8.4%	11.3%	8.4%	17.7%	2.4%	3.2%	3.2%	1.6%	6.0%	8.1%	6.0%	8.1%	3.8%	4.8%	0.0%	0.0%	6.4%	16.1%	
QUEBEC CITY	1.6%	3.0%	10.5%	24.8%	0.0%	0.0%	5.6%	15.8%	3.2%	5.0%	3.2%	4.0%	1.6%	3.0%	6.5%	10.9%	1.6%	2.0%	0.8%	1.0%	0.0%	0.0%	6.5%	30.7%	
SHERBROOKE	18.2%	5.2%	15.9%	4.5%	0.0%	0.0%	43.2%	22.1%	40.9%	18.2%	0.0%	0.0%	0.0%	0.0%	15.9%	5.2%	29.5%	9.7%	0.0%	0.0%	0.0%	0.0%	59.1%	35.1%	
ONTARIO	7.1%	3.2%	20.1%	13.4%	13.0%	6.5%	34.1%	21.8%	16.8%	10.4%	2.0%	1.0%	1.5%	0.9%	22.4%	12.7%	11.7%	5.3%	5.4%	4.0%	0.0%	0.0%	28.2%	21.1%	
ONTARIO CORE	1.6%	0.6%	19.2%	14.0%	11.2%	6.5%	29.6%	21.9%	16.8%	8.5%	1.2%	0.8%	0.0%	0.0%	22.4%	13.8%	8.0%	3.2%	0.0%	4.4%	0.0%	0.0%	30.0%	26.4%	
KINGSTON	9.1%	2.7%	39.4%	13.3%	33.3%	10.7%	39.4%	17.9%	30.3%	10.7%	3.0%	0.9%	0.0%	0.0%	27.3%	8.9%	9.1%	2.7%	0.0%	0.0%	0.0%	0.0%	51.5%	31.3%	
OTTAWA	3.8%	0.6%	45.3%	10.5%	35.8%	8.3%	60.4%	18.1%	47.2%	11.4%	0.0%	0.0%	0.0%	0.0%	60.4%	15.8%	18.9%	3.2%	1.9%	0.3%	0.0%	0.0%	64.2%	32.1%	
ST. CATHARINES	11.1%	7.5%	9.9%	16.7%	6.2%	4.2%	43.2%	32.5%	17.3%	13.3%	2.5%	1.7%	0.0%	0.0%	12.3%	8.3%	13.6%	9.2%	2.5%	1.7%	0.0%	0.0%	17.4%	5.0%	
SUBURY	0.0%	0.0%	5.1%	7.7%	2.6%	3.8%	2.6%	3.8%	28.2%	42.3%	0.0%	0.0%	0.0%	0.0%	5.1%	7.7%	2.6%	3.8%	0.0%	0.0%	0.0%	0.0%	27.5%	30.8%	
THUNDER BAY	41.4%	11.3%	34.1%	8.1%	24.1%	5.0%	41.4%	15.0%	37.9%	15.6%	6.9%	1.3%	20.7%	5.6%	44.8%	13.8%	41.4%	13.1%	31.0%	6.8%	0.0%	0.0%	10.2%	4.4%	
TORONTO	1.0%	0.3%	21.0%	19.1%	6.7%	5.0%	34.3%	26.4%	4.8%	2.7%	1.9%	1.3%	0.0%	0.0%	14.3%	11.0%	8.6%	3.3%	12.4%	9.4%	0.0%	0.0%	30.5%	21.4%	
WINDSOR	1.9%	5.3%	0.0%	0.0%	1.9%	5.3%	0.4%	36.8%	1.9%	5.3%	1.9%	5.3%	0.0%	0.0%	13.2%	36.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	5.3%	
MANITOBA	2.5%	1.5%	12.3%	6.7%	12.3%	11.8%	27.2%	15.9%	11.1%	5.1%	1.2%	0.5%	8.2%	3.1%	17.3%	8.2%	12.3%	5.6%	2%	0.5%	1.2%	0.5%	49.4%	40.5%	
BRANDON	0.0%	0.0%	0.0%	0.0%	11.1%	5.0%	33.3%	15.0%	33.3%	15.0%	0.0%	0.0%	0.0%	0.0%	33.3%	15.0%	44.4%	20.0%	0.0%	0.0%	11.1%	5.0%	55.6%	25.0%	
WINNIPEG	2.8%	1.7%	13.9%	7.4%	12.5%	12.6%	26.4%	16.0%	8.3%	4.0%	1.4%	0.6%	6.9%	3.4%	15.3%	7.4%	8.3%	4.0%	1.4%	0.6%	0.0%	0.0%	48.6%	42.3%	
SASKATCHEWAN	0.0%	0.0%	29.1%	13.2%	27.3%	9.0%	37.7%	19.6%	18.2%	8.6%	1.8%	0.8%	1.8%	1.2%	23.6%	7.8%	29.1%	10.8%	0.0%	0.0%	0.0%	0.0%	39.2%	38.3%	
REGINA	0.0%	0.0%	4.0%	1.8%	12.0%	5.4%	24.0%	12.5%	4.0%	1.8%	0.0%	0.0%	0.0%	0.0%	4.0%	1.8%	12.0%	7.1%	0.0%	0.0%	0.0%	0.0%	20.0%	69.6%	
SASKATON	0.0%	0.0%	50.0%	18.9%	40.0%	10.8%	40.0%	12.6%	30.0%	8.0%	3.3%	0.9%	3.3%	1.8%	40.0%	10.8%	43.3%	12.6%	0.0%	0.0%	0.0%	0.0%	53.3%	22.5%	
ALBERTA	0.7%	0.4%	10.8%	7.5%	7.4%	4.6%	25.4%	21.9%	14.9%	10.8%	0.7%	0.4%	1.4%	0.8%	18.9%	12.9%	21.6%	15.8%	1.4%	0.8%	0.0%	0.0%	26.4%	24.6%	
ALBERTA CORE	0.7%	0.5%	8.9%	6.2%	8.1%	5.3%	28.1%	22.6%	14.1%	10.5%	0.7%	0.5%	1.5%	1.0%	18.5%	12.9%	21.5%	16.7%	0.0%	1.0%	0.0%	0.0%	25.2%	23.0%	
CALGARY	1.4%	0.8%	14.5%	9.2%	7.2%	4.2%	31.9%	21.7%	15.9%	10.4%	1.4%	0.8%	1.4%	0.8%	20.3%	11.7%	21.7%	13.3%	0.0%	0.0%	0.0%	0.0%	34.8%	27.5%	
EDMONTON	0.0%	0.0%	4.2%	2.3%	12.5%	7.0%	33.3%	24.4%	14.6%	10.5%	0.0%	0.0%	2.1%	1.2%	22.9%	15.1%	25.0%	19.8%	4.2%	2.3%	0.0%	0.0%	20.8%	17.4%	
MEDICINE HAT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	68.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
RED DEER	0.0%	0.0%	30.8%	16.1%	0.0%	0.0%	30.8%	12.9%	23.1%	12.9%	0.0%	0.0%	0.0%	0.0%	23.1%	12.9%	23.1%	9.7%	0.0%	0.0%	0.0%	0.0%	38.5%	35.5%	
BRITISH COLUMBIA	0.7%	1.1%	3.6%	6.6%	4.6%	9.9%	12.5%	25.3%	3.3%	5.5%	1.6%	2.7%	0.3%	1.1%	4.3%	7.1%	2.0%	3.3%	0.7%	1.1%	0.7%	1.6%	14.1%	34.6%	
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%	
CAMPBELL RIVER/COURTNEY	0.0%	0.0%	3.2%	6.0%	3.2%	6.0%	6.5%	10.0%	3.2%	6.0%	0.0%	0.0%	0.0%	0.0%	6.5%	10.0%	9.7%	15.0%	0.0%	0.0%	0.0%	0.0%	19.4%	50.0%	
VANCOUVER CMA	0.8%	1.2%	3.9%	6.8%	5.0%	10.5%	14.0%	27.2%	3.5%	5.6%	1.9%	3.1%	0.4%	1.2%	4.3%	6.8%	1.2%	1.9%	0.8%	1.2%	0.8%	1.9%	14.3%	32.7%	
VANCOUVER 1	0.0%	0.0%	3.7%	9.5%	2.4%	4.8%	7.3%	23.8%	1.2%	2.4%	0.0%	0.0%	0.0%	0.0%	1.2%	2.4%	0.0%	0.0%	1.2%	2.4%	0.0%	0.0%	15.9%	54.8%	
VANCOUVER 2	0.0%	0.0%	4.8%	12.0%	0.0%	0.0%	3.1%	8.0%	3.1%	8.0%	0.0%	0.0%	0.0%	0.0%	1.5%	4.0%	1.5%	4.0%	0.0%	0.0%	0.0%	0.0%	16.9%	64.0%	
VANCOUVER 3	3.2%	4.2%	1.8%	2.1%	14.3%	27.1%	14.3%	22.9%	0.0%	0.0%	7.9%	10.4%	1.6%	4.2%	3.2%	4.2%	3.2%	4.2%	1.6%	2.1%	3.2%	6.3%	7.9%	12.5%	
VANCOUVER 4	0.0%	0.0%	6.3%	6.4%	4.2%	4.3%	39.6%	44.7%	12.5%	12.8%	0.0%	0.0%	0.0%	0.0%	14.6%	14.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.7%	17.0%	

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

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

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Tables A10 - A14: Retailer Sales Compliance under Operation ID by Class of Trade

Table A-10 – Weighted – Retailer Sales Compliance under Operation ID by Class of Trade: 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	15.2%	54.8%	86.4%	31.6%	Yes
NATIONAL (CORE)	14.7%	55.6%	86.3%	30.8%	Yes
ST. JOHNS	6.7%	15.4%	84.6%	69.2%	Yes
CHARLOTTETOWN	11.6%	20.0%	88.9%	68.9%	Yes
NEW BRUNSWICK	5.4%	46.7%	53.3%	6.7%	Yes
NEW BRUNSWICK CORE	3.5%	28.6%	71.4%	42.9%	Yes
BATHURST	N/A	N/A	N/A	N/A	N/A
FREDERICTON	5.4%	50.0%	50.0%	0.0%	No
MONCTON	10.5%	62.5%	60.0%	-2.5%	No
SAINT JOHN	3.3%	0.0%	37.5%	37.5%	Yes
NOVA SCOTIA	7.2%	40.7%	59.3%	18.5%	Yes
HALIFAX	6.9%	64.7%	75.0%	10.3%	Yes
SYDNEY	7.8%	0.0%	83.3%	83.3%	Yes
QUEBEC	15.3%	68.1%	31.9%	-36.2%	Yes
CHICOUTIMI/JONQUIERE	9.5%	8.3%	100.0%	91.7%	Yes
MONTREAL	19.2%	80.0%	77.8%	-2.2%	No
QUEBEC CITY	13.5%	65.9%	71.4%	5.5%	Yes
SHERBROOKE	14.2%	66.7%	71.4%	4.8%	No
ONTARIO	21.8%	55.8%	44.2%	-11.5%	Yes
ONTARIO CORE	21.3%	60.0%	40.0%	-20.0%	Yes
KINGSTON	21.0%	76.5%	80.0%	3.5%	No
OTTAWA	22.9%	79.6%	100.0%	20.4%	Yes
ST. CATHARINES	26.0%	47.5%	91.2%	43.7%	Yes
SUDBURY	14.3%	80.0%	100.0%	20.0%	Yes
THUNDER BAY	16.0%	0.0%	85.7%	85.7%	Yes
TORONTO	18.9%	56.4%	81.0%	24.5%	Yes
WINDSOR	30.2%	39.6%	90.6%	51.0%	Yes
MANITOBA	12.1%	63.4%	36.6%	-26.8%	Yes
BRANDON	7.7%	66.7%	50.0%	-16.7%	Yes
WINNIPEG	12.7%	63.2%	58.3%	-4.8%	No
SASKATCHEWAN	11.9%	36.1%	63.9%	27.8%	Yes
REGINA	14.1%	55.6%	88.9%	33.3%	Yes
SASKATOON	10.3%	16.7%	100.0%	83.3%	Yes
ALBERTA	22.4%	50.0%	50.0%	0.0%	No
ALBERTA CORE	23.0%	49.4%	50.6%	1.2%	No
CALGARY	24.7%	54.7%	100.0%	45.3%	Yes
EDMONTON	24.0%	46.9%	97.7%	50.8%	Yes
MEDICINE HAT	7.8%	0.0%	100.0%	100.0%	Yes
RED DEER	13.6%	66.7%	100.0%	33.3%	Yes
BRITISH COLUMBIA	10.6%	58.4%	41.6%	-16.8%	Yes
KELOWNA	8.7%	62.5%	100.0%	37.5%	Yes
CAMPBELL RIVER/COURTNAY	9.5%	50.0%	100.0%	50.0%	Yes
VANCOUVER CMA	10.9%	58.8%	94.6%	35.8%	Yes
VANCOUVER 1	14.6%	60.0%	100.0%	40.0%	Yes
VANCOUVER 2	12.1%	50.0%	100.0%	50.0%	Yes
VANCOUVER 3	9.6%	66.7%	87.5%	20.8%	Yes
VANCOUVER 4	2.9%	66.7%	50.0%	-16.7%	Yes

N/A indicates that Chain Convenience stores were not available in this region

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

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

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	13.2%	60.3%	89.5%	29.2%	Yes
NATIONAL (CORE)	13.8%	60.0%	89.3%	29.3%	Yes
ST. JOHNS	11.8%	39.1%	93.3%	54.2%	Yes
CHARLOTTETOWN	10.5%	11.1%	100.0%	88.9%	Yes
NEW BRUNSWICK	5.8%	43.8%	56.3%	12.5%	Yes
NEW BRUNSWICK CORE	5.5%	36.4%	63.6%	27.3%	Yes
BATHURST	8.3%	66.7%	100.0%	33.3%	Yes
FREDERICTON	5.4%	50.0%	66.7%	16.7%	Yes
MONCTON	6.6%	60.0%	100.0%	40.0%	Yes
SAINT JOHN	4.4%	0.0%	57.1%	57.1%	Yes
NOVA SCOTIA	5.1%	36.8%	63.2%	26.3%	Yes
HALIFAX	3.2%	87.5%	50.0%	-37.5%	Yes
SYDNEY	8.6%	0.0%	100.0%	100.0%	Yes
QUEBEC	15.8%	55.5%	44.5%	-11.0%	Yes
CHICOUTIMI/JONQUIERE	12.7%	18.8%	92.9%	74.1%	Yes
MONTREAL	14.8%	72.2%	75.0%	2.8%	No
QUEBEC CITY	19.0%	46.8%	91.7%	44.9%	Yes
SHERBROOKE	13.2%	71.4%	100.0%	28.6%	Yes
ONTARIO	14.3%	69.2%	30.8%	-38.5%	Yes
ONTARIO CORE	17.1%	69.1%	30.9%	-38.2%	Yes
KINGSTON	11.1%	33.3%	100.0%	66.7%	Yes
OTTAWA	20.1%	55.8%	100.0%	44.2%	Yes
ST. CATHARINES	7.9%	88.9%	100.0%	11.1%	Yes
SUDBURY	15.2%	93.8%	100.0%	6.3%	Yes
THUNDER BAY	4.0%	66.7%	50.0%	-16.7%	Yes
TORONTO	20.1%	73.5%	81.5%	8.0%	Yes
WINDSOR	6.3%	50.0%	100.0%	50.0%	Yes
MANITOBA	13.3%	64.4%	35.6%	-28.9%	Yes
BRANDON	17.9%	71.4%	100.0%	28.6%	Yes
WINNIPEG	12.7%	63.2%	77.8%	14.6%	Yes
SASKATCHEWAN	8.9%	77.8%	22.2%	-55.6%	Yes
REGINA	11.7%	93.3%	100.0%	6.7%	Yes
SASKATOON	6.9%	58.3%	71.4%	13.1%	Yes
ALBERTA	15.1%	52.5%	47.5%	-5.0%	No
ALBERTA CORE	15.4%	53.0%	47.0%	-6.1%	Yes
CALGARY	13.5%	53.2%	100.0%	46.8%	Yes
EDMONTON	18.1%	59.0%	83.3%	24.3%	Yes
MEDICINE HAT	10.9%	0.0%	100.0%	100.0%	Yes
RED DEER	11.4%	40.0%	100.0%	60.0%	Yes
BRITISH COLUMBIA	15.0%	67.1%	32.9%	-34.3%	Yes
KELOWNA	17.4%	62.5%	100.0%	37.5%	Yes
CAMPBELL RIVER/COURTNAY	13.1%	81.8%	100.0%	18.2%	Yes
VANCOUVER CMA	14.9%	66.4%	95.1%	28.7%	Yes
VANCOUVER 1	15.4%	81.1%	87.5%	6.4%	Yes
VANCOUVER 2	14.9%	62.5%	100.0%	37.5%	Yes
VANCOUVER 3	16.5%	55.6%	100.0%	44.4%	Yes
VANCOUVER 4	10.6%	63.6%	80.0%	16.4%	Yes

Vancouver 1: Vancouver, Richmond

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

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-12 – Weighted – Retailer Sales Compliance under Operation ID by Class of Trade: 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	Likely That Change Is Statistically Significant (Yes/No)
NATIONAL	21.8%	51.7%	82.1%	30.4%	Yes
NATIONAL (CORE)	21.7%	51.7%	81.8%	30.2%	Yes
ST. JOHNS	18.5%	19.4%	78.4%	58.9%	Yes
CHARLOTTETOWN	24.4%	28.6%	83.3%	54.8%	Yes
NEW BRUNSWICK	20.6%	42.1%	57.9%	15.8%	Yes
NEW BRUNSWICK CORE	17.4%	42.9%	57.1%	14.3%	Yes
BATHURST	36.1%	84.6%	100.0%	15.4%	Yes
FREDERICTON	20.3%	26.7%	78.6%	51.9%	Yes
MONCTON	28.9%	40.9%	86.7%	45.8%	Yes
SAINT JOHN	7.7%	0.0%	46.7%	46.7%	Yes
NOVA SCOTIA	20.5%	33.8%	66.2%	32.5%	Yes
HALIFAX	17.3%	60.5%	70.8%	10.4%	Yes
SYDNEY	26.6%	0.0%	89.5%	89.5%	Yes
QUEBEC	19.8%	57.9%	42.1%	-15.8%	Yes
CHICOUTIMI/JONQUIERE	22.2%	28.6%	90.9%	62.3%	Yes
MONTREAL	18.1%	72.7%	64.3%	-8.4%	Yes
QUEBEC CITY	19.6%	51.6%	91.2%	39.6%	Yes
SHERBROOKE	23.6%	68.0%	100.0%	32.0%	Yes
ONTARIO	22.1%	50.9%	49.1%	-1.8%	No
ONTARIO CORE	22.7%	50.0%	50.0%	0.0%	No
KINGSTON	22.2%	55.6%	88.9%	33.3%	Yes
OTTAWA	29.9%	35.9%	100.0%	64.1%	Yes
ST. CATHARINES	17.2%	71.8%	84.6%	12.8%	Yes
SUDBURY	24.8%	69.2%	80.0%	10.8%	Yes
THUNDER BAY	29.3%	18.2%	78.3%	60.1%	Yes
TORONTO	16.7%	59.4%	65.1%	5.7%	Yes
WINDSOR	27.0%	44.2%	96.0%	51.8%	Yes
MANITOBA	17.2%	53.4%	46.6%	-6.9%	Yes
BRANDON	23.1%	55.6%	80.0%	24.4%	Yes
WINNIPEG	16.4%	53.1%	62.2%	9.1%	Yes
SASKATCHEWAN	26.8%	82.7%	17.3%	-65.4%	Yes
REGINA	35.2%	100.0%	0.0%	-100.0%	Yes
SASKATOON	20.7%	61.1%	77.8%	16.7%	Yes
ALBERTA	19.9%	50.0%	50.0%	0.0%	No
ALBERTA CORE	19.6%	49.0%	51.0%	2.0%	No
CALGARY	18.7%	47.7%	87.2%	39.5%	Yes
EDMONTON	17.5%	67.8%	67.9%	0.1%	No
MEDICINE HAT	35.9%	4.3%	95.7%	91.3%	Yes
RED DEER	25.0%	63.6%	100.0%	36.4%	Yes
BRITISH COLUMBIA	26.2%	52.8%	47.2%	-5.6%	Yes
KELOWNA	42.4%	25.6%	90.6%	65.0%	Yes
CAMPBELL RIVER/COURTNAY	20.2%	52.9%	100.0%	47.1%	Yes
VANCOUVER CMA	25.0%	58.2%	86.2%	27.9%	Yes
VANCOUVER 1	19.2%	63.0%	89.5%	26.4%	Yes
VANCOUVER 2	29.3%	74.6%	80.0%	5.4%	Yes
VANCOUVER 3	29.8%	44.6%	97.3%	52.7%	Yes
VANCOUVER 4	19.2%	40.0%	66.7%	26.7%	Yes

Vancouver 1: Vancouver, Richmond

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

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-13 – Weighted – Retailer Sales Compliance Under Operation ID By Class of Trade: Independent Convenience

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	25.5%	53.4%	81.8%	28.4%	Yes
NATIONAL (CORE)	24.7%	53.4%	80.4%	27.0%	Yes
ST. JOHNS	24.6%	35.4%	50.0%	14.6%	Yes
CHARLOTTETOWN	33.7%	13.8%	100.0%	86.2%	Yes
NEW BRUNSWICK	40.8%	33.6%	66.4%	32.7%	Yes
NEW BRUNSWICK CORE	40.8%	28.0%	72.0%	43.9%	Yes
BATHURST	52.8%	47.4%	100.0%	52.6%	Yes
FREDERICTON	44.6%	36.4%	70.0%	33.6%	Yes
MONCTON	40.8%	48.4%	88.9%	40.5%	Yes
SAINT JOHN	33.0%	6.7%	50.0%	43.3%	Yes
NOVA SCOTIA	46.5%	39.4%	60.6%	21.1%	Yes
HALIFAX	44.4%	62.7%	82.0%	19.3%	Yes
SYDNEY	50.8%	0.0%	97.0%	97.0%	Yes
QUEBEC	25.6%	55.1%	44.9%	-10.2%	Yes
CHICOUTIMI/JONQUIERE	46.8%	11.9%	91.2%	79.4%	Yes
MONTREAL	14.8%	83.3%	69.2%	-14.1%	Yes
QUEBEC CITY	26.0%	61.2%	75.0%	13.8%	Yes
SHERBROOKE	35.8%	68.4%	92.3%	23.9%	Yes
ONTARIO	25.7%	62.1%	37.9%	-24.2%	Yes
ONTARIO CORE	22.5%	65.0%	35.0%	-30.0%	Yes
KINGSTON	39.5%	40.6%	95.0%	54.4%	Yes
OTTAWA	22.9%	67.3%	100.0%	32.7%	Yes
ST. CATHARINES	30.4%	79.7%	100.0%	20.3%	Yes
SUDBURY	25.7%	81.5%	62.5%	-19.0%	Yes
THUNDER BAY	34.7%	19.2%	91.3%	72.1%	Yes
TORONTO	19.2%	67.1%	66.7%	-0.4%	No
WINDSOR	28.3%	48.9%	88.5%	39.6%	Yes
MANITOBA	11.5%	41.0%	59.0%	17.9%	Yes
BRANDON	15.4%	50.0%	60.0%	10.0%	Yes
WINNIPEG	11.0%	39.4%	80.0%	40.6%	Yes
SASKATCHEWAN	14.6%	88.6%	11.4%	-77.3%	Yes
REGINA	18.8%	100.0%	0.0%	0.0%	0
SASKATOON	11.5%	75.0%	100.0%	25.0%	Yes
ALBERTA	16.1%	53.1%	46.9%	-6.3%	Yes
ALBERTA CORE	15.4%	55.7%	44.3%	-11.3%	Yes
CALGARY	16.7%	63.8%	95.5%	31.7%	Yes
EDMONTON	11.6%	66.7%	72.2%	5.6%	Yes
MEDICINE HAT	28.1%	5.6%	100.0%	94.4%	Yes
RED DEER	29.5%	30.8%	100.0%	69.2%	Yes
BRITISH COLUMBIA	28.2%	62.5%	37.5%	-24.9%	Yes
KELOWNA	17.4%	56.3%	100.0%	43.8%	Yes
CAMPBELL RIVER/COURTNAY	32.1%	51.9%	92.9%	41.0%	Yes
VANCOUVER CMA	29.1%	64.2%	91.0%	26.9%	Yes
VANCOUVER 1	30.4%	67.1%	92.3%	25.2%	Yes
VANCOUVER 2	27.9%	75.0%	100.0%	25.0%	Yes
VANCOUVER 3	28.4%	53.2%	100.0%	46.8%	Yes
VANCOUVER 4	29.8%	58.1%	68.4%	10.4%	Yes

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver

Evaluation of Retailers' Behaviour Towards Certain Youth Access-to-Tobacco Restrictions (2004)

Table A-14 – Weighted – Retailer Sales Compliance Under Operation ID By Class of Trade: Pharmacy

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	Likely That Change Is Statistically Significant (Yes/No)
NATIONAL	6.5%	66.5%	88.9%	22.4%	Yes
NATIONAL (CORE)	7.0%	66.2%	88.7%	22.5%	Yes
ST. JOHNS	8.7%	58.8%	77.8%	19.0%	Yes
CHARLOTTETOWN	11.6%	0.0%	100.0%	100.0%	Yes
NEW BRUNSWICK	N/A	N/A	N/A	N/A	N/A
NEW BRUNSWICK CORE	N/A	N/A	N/A	N/A	N/A
BATHURST	N/A	N/A	N/A	N/A	N/A
FREDERICTON	N/A	N/A	N/A	N/A	N/A
MONCTON	N/A	N/A	N/A	N/A	N/A
SAINT JOHN	N/A	N/A	N/A	N/A	N/A
NOVA SCOTIA	N/A	N/A	N/A	N/A	N/A
HALIFAX	N/A	N/A	N/A	N/A	N/A
SYDNEY	N/A	N/A	N/A	N/A	N/A
QUEBEC	N/A	N/A	N/A	N/A	N/A
CHICOUTIMI/JONQUIERE	N/A	N/A	N/A	N/A	N/A
MONTREAL	N/A	N/A	N/A	N/A	N/A
QUEBEC CITY	N/A	N/A	N/A	N/A	N/A
SHERBROOKE	N/A	N/A	N/A	N/A	N/A
ONTARIO	N/A	N/A	N/A	N/A	N/A
ONTARIO CORE	N/A	N/A	N/A	N/A	N/A
KINGSTON	N/A	N/A	N/A	N/A	N/A
OTTAWA	N/A	N/A	N/A	N/A	N/A
ST. CATHARINES	N/A	N/A	N/A	N/A	N/A
SUDBURY	N/A	N/A	N/A	N/A	N/A
THUNDER BAY	N/A	N/A	N/A	N/A	N/A
TORONTO	N/A	N/A	N/A	N/A	N/A
WINDSOR	N/A	N/A	N/A	N/A	N/A
MANITOBA	10.4%	71.4%	28.6%	-42.9%	Yes
BRANDON	2.6%	100.0%	0.0%	-100.0%	Yes
WINNIPEG	11.4%	70.6%	66.7%	-3.9%	No
SASKATCHEWAN	14.2%	60.5%	39.5%	-20.9%	Yes
REGINA	13.3%	76.5%	100.0%	23.5%	Yes
SASKATOON	14.9%	50.0%	81.3%	31.3%	Yes
ALBERTA	18.2%	75.0%	25.0%	-50.0%	Yes
ALBERTA CORE	18.0%	74.8%	25.2%	-49.6%	Yes
CALGARY	18.1%	77.8%	93.3%	15.6%	Yes
EDMONTON	18.4%	83.9%	83.3%	-0.5%	No
MEDICINE HAT	15.6%	0.0%	100.0%	100.0%	Yes
RED DEER	20.5%	77.8%	100.0%	22.2%	Yes
BRITISH COLUMBIA	11.4%	63.3%	36.7%	-26.6%	Yes
KELOWNA	9.8%	22.2%	100.0%	77.8%	Yes
CAMPBELL RIVER/COURTNAY	9.5%	62.5%	100.0%	37.5%	Yes
VANCOUVER CMA	11.8%	67.4%	96.8%	29.4%	Yes
VANCOUVER 1	13.8%	81.8%	100.0%	18.2%	Yes
VANCOUVER 2	9.3%	85.0%	100.0%	15.0%	Yes
VANCOUVER 3	14.2%	45.2%	100.0%	54.8%	Yes
VANCOUVER 4	7.7%	50.0%	80.0%	30.0%	Yes

N/A indicates that Pharmacies in this area do not carry tobacco products.

Vancouver 1: Vancouver, Richmond

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

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

Vancouver 4: North Vancouver, West Vancouver