

Canadian Public Opinion on Packaging of Tobacco and Marijuana Cigarettes

Canadians Believe in Equal Application in Packaging Standards for Marijuana and Tobacco Cigarette's, Choose Branded Packages Over Generic Packaging Citing Concern for Rise in Criminal Counterfeiting

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Canadians Believe in Equal Application in Packaging Standards for Marijuana and Tobacco Cigarette's, Choose Branded Packages Over Generic Packaging Citing Concern for Rise in Criminal Counterfeiting

A new national Canadian public opinion survey for the Canadian Convenience Stores Association (CCSA) and the National Convenience Stores Distributors Association of Canada (NACDA) finds that nine in 10 (87%) Canadians believe that current tobacco cigarette packaging regulations should be applied **equally** to marijuana cigarette packaging.

Further, two thirds (64%) of Canadians reject any imposition of a generic package for either tobacco and marijuana cigarettes, and five times as many Canadians (40%) believe the generic package could most likely contribute to counterfeiting of tobacco and marijuana cigarettes versus the branded package which is now in place (8%).

And, after Canadians learn about the Australian experience since 2012 with respect to the imposition of generic packaging and higher taxes and the concurrent increase in contraband/counterfeit products, support for the branded package status quo rises *significantly* from 64% to 78% (up 14 points.)

*The survey was carried out by national polling veteran John Wright, CEO of the Insight Division of **DART** Insight and Communications. It's important to note that the questionnaire methodology ensured that there was no inter-item contamination of the subject matter as it was carefully rotated and randomized. The information on the Australian experience – gleaned from publicly available Australian government documents – was provided only at the end of the questionnaire when a previous question was asked in exactly the same way. Citations are noted below on the methodology section.*

A Majority (87%) Want a Marijuana Cigarette Packaging Applied Equally to Both Marijuana Cigarettes and Tobacco Cigarettes...

Nine in 10 (87%) Canadians believe that marijuana cigarette packaging should have the same regulations as tobacco cigarette packaging. In fact, two thirds (62%) of Canadians are strongly of this view. Only one in 10 (13%) oppose this uniformity of application.

From a geographic perspective, those from British Columbia (91% – 68% very/23% somewhat) are most likely to agree with this uniformity followed by those from Atlantic Canada (89% – 62%/27%), Saskatchewan/Manitoba (88% – 72%/16%), Ontario (88% – 56%/32%), Alberta (87% – 60%/27%) and Québec (84% – 68%/16%). There are virtually no differences when examining socio-demographics, however those *most* likely to embrace this application are older (55+ 91% – 72%/19%), highest household income (\$100,000 + household income 91% – 68%/22%).

2/3rd's of Canadians (64%) Choose Branded Packaging Over Non-Branded (36%) for Both Marijuana Cigarettes and Tobacco Cigarettes...

Two-thirds (64%) of Canadians believe **the government should keep the regulations for tobacco** cigarette packaging that allow *a branded name and colour along with a large health warning sign on the package* and to be **applied to marijuana cigarettes as opposed to one-third (36%)** who believe **the government should change the current tobacco cigarette packaging** regulations to have marijuana cigarettes and tobacco cigarettes each wrapped in a completely *plain, beige or muddy green package with no branding in a large health warning sign on the package*.

Geographically, those who are most likely to believe that the government should keep and apply the current branded packaging regulations to both marijuana and tobacco cigarettes (64%) are from British Columbia (69%), followed by those from Ontario (67%), Atlantic Canada parentheses 62%), Québec (62%), Alberta (62%) and Saskatchewan/Manitoba (58%). There are virtually no socio-demographic differences with the exception of those with technical/College education (70%) and who are older (55+ 67%).

Those who believe there should be a change in the regulations and require a form of non-branded, "generic" packaging for both marijuana and tobacco cigarettes (36%), are most likely to be from Saskatchewan/Manitoba (43%) followed by those from Atlantic Canada (38%), Québec (38%), Alberta (38%), Ontario (33%) and British Columbia (31%). From a socio-demographic perspective, those most likely to support this option are highest income (43% \$100,000 + household income), younger (40% 18 - 34 years of age) and University educated (39%).

Five Times as Many Canadians Believe Generic Package Most Likely to Contribute to Criminal Counterfeiting than Branded Package Option for both Marijuana and Tobacco Cigarettes...

Four in 10 (41%) Canadians are more likely to believe that generic *marijuana cigarette packaging* will make it easier for criminals to produce counterfeit cigarettes compared with just one and 10 (8%) who believe this will be the case for branded packaging – a ratio of 5 to one. This compares to one quarter (25%) of Canadians who believe that *both* types of packaging (branded and generic) will be subject to potential counterfeiting and slightly more (26%) who believe that *neither* types of package will be likely counterfeited.

Those most likely to believe that non-branded packages for marijuana cigarettes will make it easier for criminals to produce counterfeit cigarettes (41%) are led by those from Saskatchewan/Manitoba (51%) followed by those from Alberta (45%), Ontario (45%), British Columbia (41%) and Québec (31%).

Those most likely to believe that branded packaging for marijuana cigarettes (8%) are most likely geographically to reside in Saskatchewan/Manitoba (12%), followed by those from Québec (11%), British Columbia (8%), Ontario (7%), Atlantic Canada (7%) and Alberta (6%); and, from a socio-demographic perspective, are lowest educated (12%) and young (11% aged 18 - 34).

As for those who believe that both concepts will make it easier for criminals to produce counterfeit cigarettes (25%) their most likely to reside in Atlantic Canada (28%) followed by those in Ontario (27%), Québec (24%), British Columbia (23%), Saskatchewan/Manitoba

(22%) and Alberta (19%); from socio-demographic perspective, those who are older (55+ 28%) are most likely to believe this to be the case

One in four (26%) believe that neither the “branded” or “generic” packaging will make it easier for criminals to produce counterfeit cigarettes. Those most likely to believe this to be the case reside in Québec (35%), followed by those from Alberta (29%), British Columbia (28%), Atlantic Canada (25%), Ontario (21%) and Saskatchewan/Manitoba (16%); there are no significant socio-demographic groups of note.

The results are virtually identical for tobacco cigarettes (note that the two questions were rotated and randomized so there would be no respondent bias.)

Four in 10 (40%) Canadians are more likely to believe that generic *tobacco cigarette packaging* will make it easier for criminals to produce counterfeit cigarettes compared with just one and 10 (8%) who believe this will be the case for branded packaging – a ratio of 5 to one. This compares to one quarter (24%) of Canadians who believe that *both* types of packaging (branded and generic) will be subject to potential counterfeiting and slightly more (28%) who believe that *neither* types of package will be likely counterfeited.

Focused on geography, those most likely to believe that “generic packaging” will make it easier for criminals to produce counterfeit cigarettes (40%) hailed from British Columbia (47%) followed by those from Atlantic Canada (44%), Saskatchewan/Manitoba (44%), Alberta (42%), Ontario (42%) and Québec (31%). From a socio-demographic perspective, those most likely to agree with this are technical/College educated (47%) followed by those who are women (44%) and younger (43% 18 – 34 years of age).

Those who believe that branded cigarette packages will make it easier for criminals to produce counterfeit cigarettes (8%) are most likely to come from Atlantic Canada (14%) followed by Saskatchewan/Manitoba (15%), Québec (9%), Alberta (8%), British Columbia (6%) and Ontario (5%). Those who are lowest educated (12%) and oldest (aged 55+11%) are most likely to believe this to be the case.

One in four (24%) believe that neither “branded” nor “generic” packaging will make it easier for criminals to produce counterfeit cigarettes. Geographically, these Canadians are most likely to be found in Québec (26%) and Ontario (26%) followed by those from British Columbia (24%), Saskatchewan/Manitoba (22%), Atlantic Canada (19%) and Alberta (18%). Those who have children in the household (29%), and who are middle aged (28% aged 35 – 54) and men (27%) are most likely to highest in support for this perspective.

When Informed of Australia’s Experience, Support for Branded Packaging Rises 14 points to 78%...

When informed that in 2012 Australia introduced plain packaging of cigarettes along with higher annual taxes on the product and that by 2017 the contraband/counterfeit cigarette market share rose to over 15% and cost the government almost \$2 billion annually in lost revenue, **support for the Canadian government to choose current regulations for tobacco cigarette packaging** that allow a branded name and colour along with a large health warning sign on the package and have the same applied to marijuana cigarettes **rises to 78% (up 14 points)**. In the alternative, support for the Canadian government **to change the current tobacco cigarette packaging** regulations to have marijuana cigarettes and tobacco cigarettes each wrapped in a completely plain, beige, or muddy green package with no branding in a large health warning sign on the package **drops to 22% (down 14 points.)**

The following indicates not only the results from the specific question but also the percentage point difference between the first question that did not have this information and any resulting change after the respondent was provided with information about Australia's experience with respect to its imposition of higher taxes and non-branded packaging.

Geographically, those who are most likely to believe that the government should keep and apply the current branded packaging regulations to both marijuana and tobacco cigarettes (78% now versus 64% at the outset **+14**) are from Saskatchewan/Manitoba (86% now versus 58% at the outset **+28**) followed by those from British Columbia (84% now versus 69% at the outset **+15**), Atlantic Canada (82% now versus 62% at the outset **+20**), Alberta (81% now versus 62% at the outset **+19**), Ontario (79% now versus 67% at the outset **+12**) and Québec (69% now versus 62% **+7**). There are virtually no socio-demographic differences of opinion.

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Methodology

*These are some of the findings of a **DART** Insight poll conducted May 10-13, 2018 on behalf of the Canadian Convenience Stores Association (CCSA) and the National Convenience Stores Distributors Association of Canada (NACDA). **DART** Insight constructed the questionnaire and analysis. From May 10 to May 13, 2018, **DART** Insight conducted the resulting Online survey among 1,004 randomly selected Canadian adults who are members of the Maru/Blue Online panel (<https://www.marublue.net/>). The results have been weighted by education, age, gender, and region (and in Quebec, language) to match the population, according to Census data. This is to ensure the sample is representative of the entire adult population of Canada. Discrepancies in or between totals are due to rounding. The precision of this **DART** Insight Online poll is measured using a Bayesian Credibility Interval. In this case, the poll is accurate to within +/- 3.9 percentage points, 19 times out of 20, had all Canadian adults been polled. The credibility interval will be wider among subsets of the population and geography.*

References to the Australian experience used in the final question of the survey have come from here:

¹ https://assets.kpmg.com/content/dam/kpmg/uk/pdf/2018/05/australia_illicit_tobacco_report_2017.pdf

² <https://www.aihw.gov.au/reports/illicit-use-of-drugs/ndshs-2016-key-findings/contents/highlights-from-the-2016-survey>



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