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TOBACCO PROPOSALS



- Final Report -

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INTRODUCTION

The Angus Reid Group was commissioned by Health Canada to administer a questionnaire on the federal government's tobacco proposal. This report documents the findings of this project.

Research Methodology

These results are based on a Canada-wide survey, conducted among a representative cross-section of 1,000 Canadian adults between December 13 and 16, 1996. This sample size has an associated margin of error of $\pm 3.1\%$, nineteen times out of twenty. The questionnaire was designed by the Angus Reid Group in consultation with Health Canada and required approximately ten minutes to complete.

Research Objectives

The objectives of this study were to:

- #1 Determine general awareness of the federal government's tobacco proposal.
- 2 Determine the level of public support for the tobacco proposal.
- 3 Test various messages associated with the tobacco proposal.
- 4 Test the believability of various spokespersons regarding the tobacco proposal.
- 5 Test knowledge of the tobacco proposal.
- 6 Test the direction of support for the proposed changes.

KEY FINDINGS

- Overall awareness of the proposed changes that would affect the sale and promotion of tobacco products is high with eight in ten (80%) having "read or heard something".
- Of those who reported being aware of the tobacco proposal, more than half (52%) had heard of restrictions on tobacco advertising and promotions. One third (33%) recall having heard about tax increases on tobacco.
- The results show that there is strong support for the tobacco proposal (55% strongly support, 25% somewhat support).
- Reasons for supporting the changes were primarily health based, with four in ten (41%) supporters volunteering that "health is the most important consideration".
- Almost half (48%) of those surveyed believe that the federal government's proposals would let tobacco companies sponsor cultural or sporting events, but limit the visibility of cigarette brand names.
- The most credible spokespeople on this issue are doctors (92% - who consistently receive high marks on credibility), followed by experts on the effects of smoking (89%).
- Two thirds of respondents (66%) indicated that they have become more supportive of the proposals since the announcement in November compared to one quarter (24%) who have become more opposed.
- The results indicate that one quarter of Canadians (26%) smoke.

DETAILED RESULTS

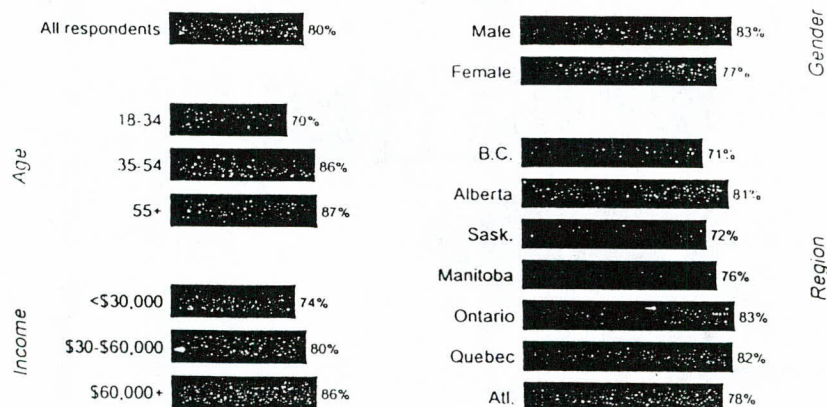
Awareness of the Tobacco Proposal

Overall awareness of the proposed changes that would affect the sale and promotion of tobacco products is high with eight in ten (80%) having "read or heard something". Awareness is highest among older respondents, those in higher income brackets, and men. There is no apparent difference in awareness between smokers and non-smokers.

Regionally, respondents in Ontario (83%), Quebec (82%), and Alberta (81%) were the most aware while those in B.C. (71%) and Saskatchewan (72%) were the least aware of the tobacco proposal.

Awareness of the Tobacco Proposal

Have you read or heard anything lately about the federal government announcing proposed changes that would affect the sale and promotion of tobacco products?
- % Yes -



Base: all respondents 1,000

Specific Areas of Awareness

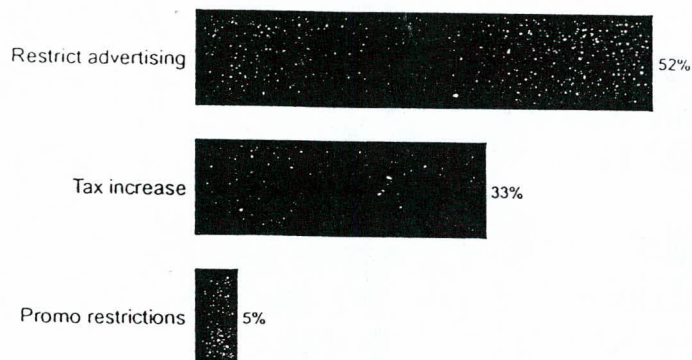
Of those who reported being aware of the tobacco proposal, more than half (52%) had heard of restrictions on tobacco advertising and promotions. One third (33%) recall having heard about tax increases on tobacco.

Awareness of the restrictions on advertising and promotions was highest among those aged 35 to 54, those in higher income brackets, those with higher education, and men. Regionally, awareness of these restrictions was highest in Alberta (60%) and Quebec (59%) and lowest in B.C. (51%) and Manitoba (52%).

Awareness of the tobacco tax increase was highest among those 18 to 34, and those with some post-secondary education. Regionally, awareness of the tax increase was highest among those in the Atlantic Provinces (47%), and Ontario (40%) and lowest in Manitoba (18%) and Quebec (24%).

Awareness of the Tobacco Proposal

What have you heard?



Base: aware of proposal: 802

Support for the Tobacco Proposal

Respondents were read the following information:

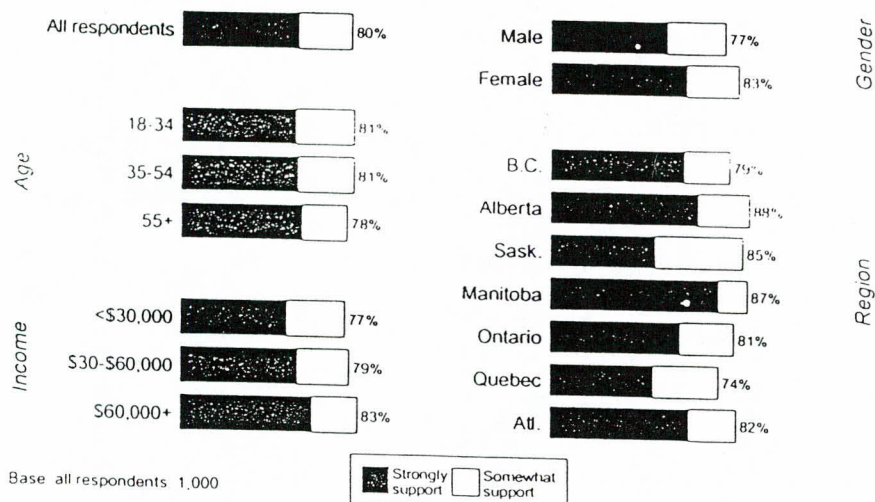
"The federal government has announced its intention to do the following things regarding tobacco:

- Limit access by young people to tobacco products by prohibiting self-service displays, banning vending machine sales, and requiring photo I.D.
- Restrict the exposure of young people to tobacco advertising and promotion.
- Increase health information on tobacco packages.
- Increase taxes on cigarettes (read to only those in Ontario, Quebec, Nova Scotia, and New Brunswick)."

Support for the Tobacco Proposal

Would you say that you support or oppose the proposed changes?

- % strongly or somewhat support -



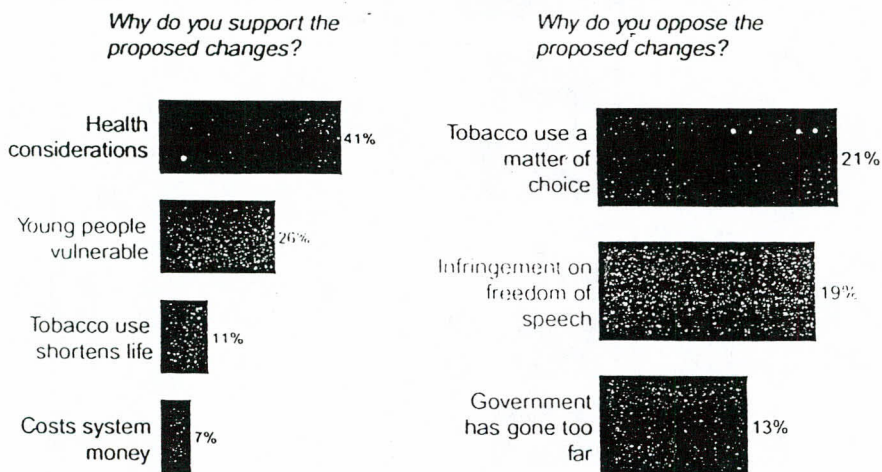
The results show that there is strong support for the tobacco proposal (55% strongly support, 25% somewhat support). Support for the tobacco proposal is highest in Alberta (65% strongly support) followed by those in the Atlantic provinces (61%), and lowest in Ontario (57%) and Quebec (45%). Those with higher incomes and education were more likely to support the proposals. And women were more likely to strongly support the tobacco proposal (60%) compared to men (51%). Not surprisingly, non-smokers (66%) were more than twice as likely to strongly support the tobacco proposal compared to smokers (27%).

Reasons for Supporting or Opposing the Tobacco Proposal

Reasons for supporting the changes were primarily health based, with four in ten (41%) supporters volunteering that "health is the most important consideration". One quarter (26%) of those who support the proposals volunteered that "young people are vulnerable to advertising". Other responses included "tobacco use shortens people's lives (11%) and "tobacco use costs our health care system a lot of money".

Reasons for opposing the changes include "tobacco use should be a matter of personal choice" (21%), "restricting advertising and promotion is an infringement on freedom of speech (19%), and "the government has gone too far in restricting a legal product" (13%).

Reasons for Supporting or Opposing



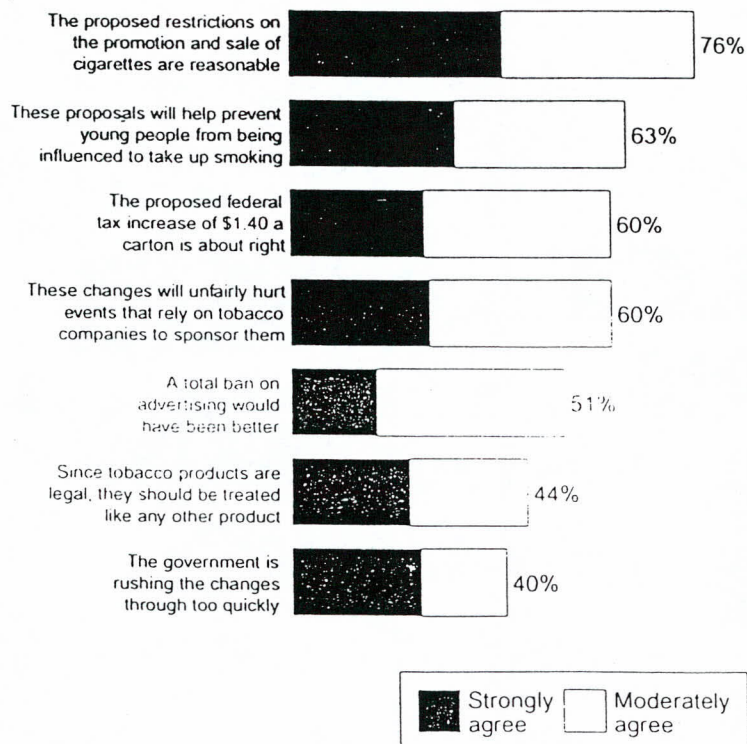
Base: support changes: 800

Base: oppose changes: 184

Agreement with General Statements

Respondents were asked to agree or disagree with seven statements regarding the proposed tobacco changes. Although the results point to a "go" for the proposals, the data also show that a majority believe that the changes will unfairly hurt festivals and sporting events that rely on tobacco companies. The following chart illustrates the general agreement levels to each statement.

General Statements



Base: all respondents: 1,000

In general, when demographic or regional differences existed, agreement with the statements that are "for" the proposed tobacco restrictions was highest among older, more affluent, more educated, and female respondents, while agreement with the statements that are "against" the proposed restrictions was highest among younger, less affluent, less educated, male respondents, and those in Quebec, Alberta, and the Atlantic provinces. These demographic and regional observations reflect the fact that smokers are more likely to be younger, less affluent, less educated, and male. Smokers are also more likely to live in Quebec, Alberta, and the Atlantic provinces.

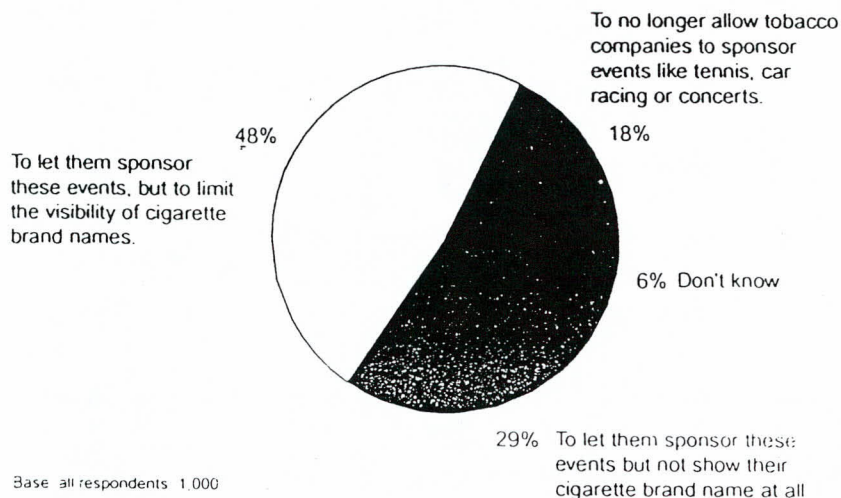
Those respondents who disagreed with the statement "the proposed federal tax increase of \$1.40 a carton is about right" were asked whether they felt the proposed increase should be more or less. One third (35%) thought that the increase should be more while six in ten (61%) thought that the increase should be less. Smokers were more than twice as likely (91%) to believe that the proposed increase should be less than \$1.40 per carton compared to non-smokers (40%).

Knowledge of the Tobacco Sponsorship Proposal

Almost half (48%) of those surveyed believe that the federal government's proposals would let tobacco companies sponsor cultural or sporting events, but limit the visibility of cigarette brand names. Three in ten (29%) report the proposals would let them sponsor events, but not show their cigarette brand name at all, and eighteen percent believe the proposals would no longer allow tobacco companies to sponsor cultural or sporting events.

Knowledge of Proposals

To the best of your knowledge, which of the 3 following choices best describes what the federal government is proposing about sponsorship of events by tobacco companies?



Belief that the restrictions would still allow tobacco companies to sponsor events but would limit the visibility of cigarette brand names is highest among younger respondents (55% of those aged 18 to 34 compared to 36% of those aged 55 or older), those with some post-secondary education (54% compared to 42% of those with a high school education), and those in Quebec (54% compared to 39% of those in the Atlantic provinces).

Respondents were also asked the following question:

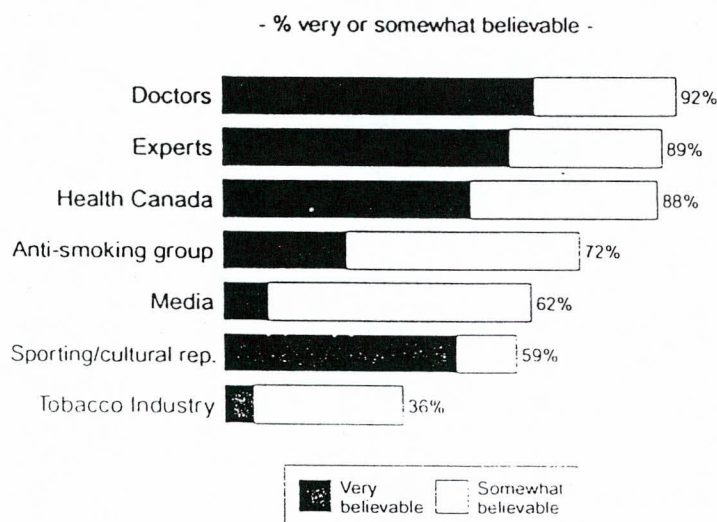
"Tobacco companies use the brand names of their products in association with events that the companies sponsor. Do you think that the use of these brand names is a form of advertising?"

Nine in ten respondents (90%) indicated that they did believe use of brand names is a form of advertising. There was no significant demographic or regional differences to this result.

Believability of Various Spokespeople

The most credible spokespeople on this issue are doctors (92% - who consistently receive high marks on credibility), followed by experts on the effects of smoking (89%), Health Canada (88%), and a representative of anti-smoking groups (71%). Nearly six in ten (58%) rate a representative of the cultural or sporting community affected by the proposed restrictions as believable. Only one third (36%) rate a representative of the tobacco industry as believable on this issue.

Credibility of Spokespeople



Base: all respondents: 1,000

In general, smokers (and therefore the demographic and regional groups which primarily comprise smokers) were less likely to find the various spokespeople credible except for representatives of the cultural or sporting community affected by the proposed restrictions (70% of smokers would find them credible compared to 54% of non-smokers) and a representative of the tobacco industry (53% of smokers would find them credible compared to 30% of non-smokers).

Direction of Support

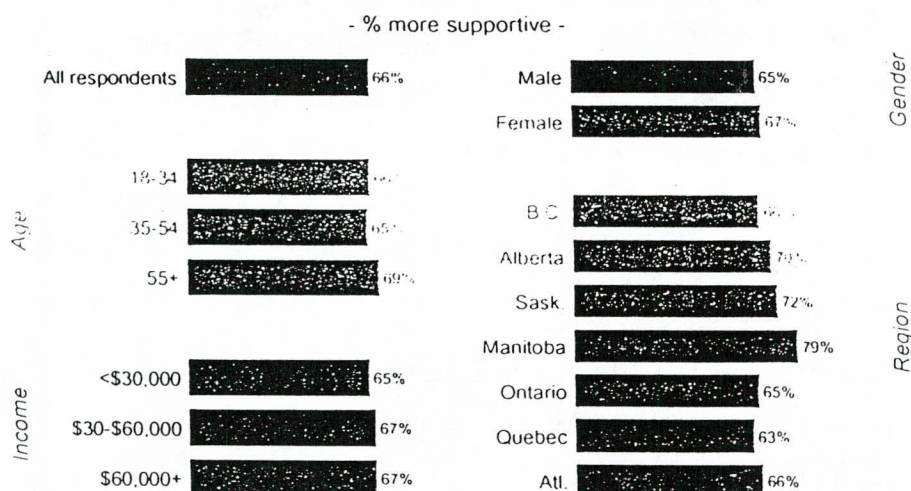
To gauge the direction of support for the proposed changes, respondents were asked the following question:

"Since the proposed changes were announced on November 28, would you say that you have become more supportive or more opposed to the changes?"

Two thirds of respondents (66%) indicated that they have become more supportive since the announcement compared to one quarter (24%) who have become more opposed. Again, the results show that the demographic and regional differences for this question reflect the fact that non-smokers are more likely to have become more supportive (76%) compared to smokers (39%).

Direction of Support

Since the proposed changes were announced on November 28, would you say that you have become more supportive or more opposed to the changes?



Base: all respondents: 1,000

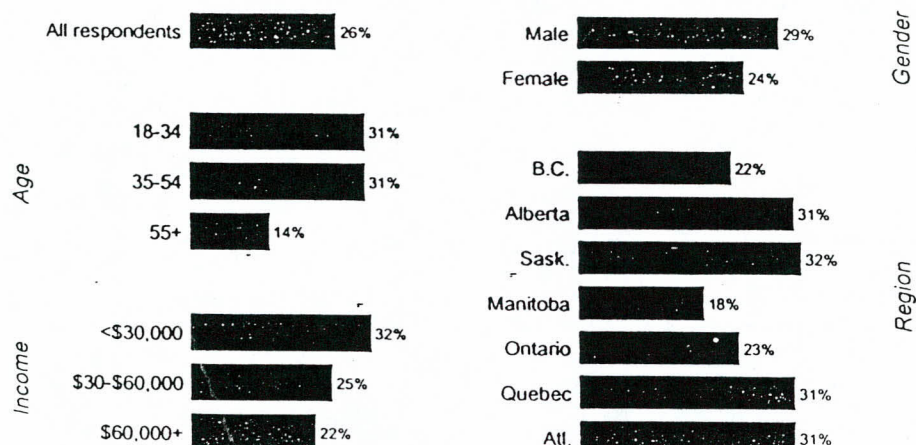
Smoking Behavior

The results indicate that one quarter of Canadians (26%) smoke. Smokers are more likely to be younger, less affluent, less educated and male. Regionally, smokers are more likely to be found in Quebec, Alberta and the Atlantic provinces.

Smoking Behaviour

Do you, yourself, smoke?

- % Yes -



Base: all respondents 1,000

Of those who said they were non-smokers, about half (46%) indicated that used to smoke but have quit compared to slightly more than half (54%) who indicated that they have never smoked. Those who indicated that they used to smoke and have since quit were more likely to be younger, less educated, and male - the same demographic groups of which the smoking population is comprised.

APPENDIX - THE QUESTIONNAIRE

1. Have you read or heard anything lately about the federal government announcing proposed changes that would affect the sale and promotion of tobacco products?

Yes: 80%

No: 20%

2. What proposed changes do you recall hearing? [OPEN ENDED]

Tax increase: 33%

Restrictions on advertising: 52%

Restrictions on promotional displays: 5%

Increased reporting requirements: 1%

Photo ID requirements: 3%

3. In fact the federal government has announced its intention to do the following things regarding tobacco:

- Limit access by young people to tobacco products by prohibiting self-service displays, banning vending machines sales and requiring photo ID.
- Restrict the exposure of young people to tobacco advertising and promotion.
- Increase health information on tobacco packages.
- Increase taxes on cigarettes in Ontario, Quebec, Nova Scotia, and New Brunswick

Now that I have read you the entire package, would you say that you support or oppose the proposed changes?

Strongly support: 55%

Somewhat support: 25%

Somewhat oppose: 10%

Strongly oppose: 8%

Don't know: 2%

4. And why do you support the proposed changes? [ASK IF SUPPORT IN Q3 - OPEN ENDED]

5. And why do you oppose the proposed changes? [ASK IF OPPOSE IN Q3 - OPEN ENDED]

6. A number of things have been said about the proposed changes. I'm going to read you some of these statements. Please tell me whether you agree or disagree with each of them

STATEMENT	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know
6a The proposed restrictions on the promotion and sale of cigarettes are reasonable.	40%	36%	11%	12%	1%
6b The government is rushing the changes through too quickly.	24%	16%	23%	34%	3%
6c The proposed federal tax increase of \$1.40 a carton is about right.	35%	25%	10%	26%	4%
6d A total ban on advertising would have been better.	35%	16%	24%	23%	2%
6e Since tobacco products are legal, when it comes to sale and advertising they should be treated just like any other product.	22%	22%	19%	37%	1%
6f These proposals will help prevent young people from being influenced to take up smoking.	32%	31%	16%	20%	1%
6g These changes will unfairly hurt festivals and sporting events that rely on tobacco companies to sponsor them.	34%	26%	17%	21%	2%

7. Should the increase be more or less? [ASK IF DISAGREE WITH INCREASE IN Q6] (bc)

More: 35%

Less: 61%

Don't Know: 4%

8. To the best of your knowledge, which of the 3 following choices best describes what the federal government is proposing about sponsorship of events by tobacco companies?

	%
To no longer allow tobacco companies to sponsor events like tennis, car racing or concerts.	18%
To let them sponsor these events, but to limit the visibility of cigarette brand names.	48%
To let them sponsor these events but not show their cigarette brand name at all.	29%
Don't know.	6%

9. Tobacco companies use brand names of their products in association with events that the companies sponsor. Do you think the use of these brand names is a form of advertising?

Yes: 90%

No: 9%

Don't know: 1%

10. A number of groups and individuals are expressing their views on the government's proposed changes. Please tell me how believable you find each of the following groups when they speak on the tobacco issue. That is, do you find them very believable, somewhat believable, not too believable, or not believable at all?

	Very believable	Somewhat believable	Not too believable	Not at all believable	Don't know
10a A representative of the tobacco-industry	6%	30%	25%	36%	2%
10b Health Canada	50%	38%	6%	4%	2%
10c A representative of anti-smoking groups	25%	47%	17%	10%	2%
10d An expert on the effects of smoking	58%	31%	5%	3%	2%
10e A representative of the cultural or sporting community affected by the proposed restrictions on tobacco company promotions	12%	47%	25%	13%	3%
10f A newspaper or television	9%	53%	23%	11%	4%
10g Doctors	63%	29%	5%	3%	1%

11. Since the proposed changes were announced on November 28, would you say that you have become more supportive or more opposed to the changes?

More supportive: 66%

More opposed: 24%

Don't know: 10%

12. Do you, yourself smoke?

Yes: 26%

No: 74%

13. Did you used to smoke, but have quit? [ASKED IF NO IN Q12]

Yes: 46%

No: 54%

14. Which of the following categories does your age fall into?

18 to 24: 15%

25 to 34: 22%

35 to 44: 19%

45 to 54: 17%

55 to 64: 13%

65 +: 14%

15. What is the highest level of formal education that you have completed?

Grade school or some high school: 16%

Complete high school: 28%

Technical, vocational, post-secondary: 23%

Some university: 10%

Complete university degree: 16%

Post graduate degree: 7%

16. And, which of the following categories best describes your annual household income? That is, the total income before taxes - or gross income - of all persons in your household combined?

under \$10,000	6%
\$10,000 to \$19,999:	11%
\$20,000 to \$29,999:	13%
\$30,000 to \$39,999:	13%
\$40,000 to \$49,999:	12%
\$50,000 to \$59,999:	10%
\$60,000 to \$69,999:	7%
\$70,000 to \$79,999:	5%
\$80,000 to \$99,999:	8%
\$100,000 +:	4%
Refused:	11%