



**Results of national survey on perception of plain  
packaging on cigarettes and  
the government consultation  
August 2016**



## Background

### Polling the Canadian adult public's views on plain packaging

The federal government announced on 31<sup>st</sup> May 2016 that it would hold three months of public consultations before it follows through on plans to have companies use generic packaging for cigarettes and other tobacco products.

75% of cigarette packs are already made up of written and graphic warnings. Stores are not allowed to have cigarettes on display. Cigarette packs are held behind doors and smokers have to ask for them. The change to plain packaging would also mean the removal of all branding (including colours, imagery, logos and trademarks). The brand name would appear in a mandated uniform small print on packs. The appearance of all tobacco packs would be the same, including the colour of the pack front and back, which would likely be a drab brown/green.

By way of clarity of understanding and transparency in the research, when the change to plain packaging was explained people were shown the comparative image below. (N.B. Pack sizes shown were changed to reflect regional differences. Packs in French were also shown to those responding to the survey in French.)

#### Example of change in plain packaging

Current



With Plain Packaging





## **Why JTI paid for the survey & why it was carried out by leading independent research company Forum Research.**

JTI is a tobacco company. It is against the introduction of plain packaging. Its view was that the timing, scope and awareness of the public consultation was inadequate. It believed the government had been selective in the evidence it had looked at and also showed on its consultation website to the Canadian public. The consultation website does not show arguments or evidence against plain packaging. JTI also believed that there are a number of negative consequences that would affect the Canadian public should plain packaging be introduced. It believes these should be appraised openly and fairly. It believes the views of the Canadian public should be properly and independently assessed.

It contacted Forum Research as an independent research company to carry out a national survey. The full questionnaire and the results are also available to avoid any accusations that what is contained in this report is selective. Forum approved and verified the survey before it went into market. It verified that all the questions in this survey are constructed in a way that is fair and unbiased from a professional market research standing. Apart from agreeing the methodology in terms of sample size and construction, JTI had no sight or input on who Forum surveyed.

Forum Research carried out a national online survey of 2,301 Canadians, including 289 self-identified regular smokers, aged 19+ between August 2<sup>nd</sup> and 9<sup>th</sup> 2016. The survey was regionally and demographically representative of the Canadian population. The results for all adults are statistically valid at a level +/- 2% of probability. Forum can be contacted directly to answer any questions on the methodology or the way in which the research was conducted.



## **Why Forum Research was selected to carry out the research.**

When a tobacco company carries out research or presents research arguments they are frequently treated with skepticism. JTI wanted to get the views of the Canadian public on plain packaging, the public consultancy and related issues. It contacted Forum Research as a major and well-known independent research company in Canada to carry out this research. It wanted to be able to assess and show these opinions. It wants to encourage a much more open and public debate on plain packaging without any accusations that JTI has fixed or tampered with the public opinion poll in anyway.

Forum Research carry out The Forum Poll™. This is Canada's leading public opinion poll, proven to be the most reliable chronicle of the public pulse in the country. Forum Research is a member-in-good-standing of the Marketing Research and Intelligence Association, the self-regulatory Association which governs and represents the market, survey, and public opinion industry in Canada. In addition to satisfying conditions related to core focus and business continuity, professional conduct and compliance with MRIA Professional Standards, Forum Research has successfully completed a rigorous, independent assessment of its research practices by a third party Certification Reviewer.

For any further information please email [wschatten@forumresearch.com](mailto:wschatten@forumresearch.com).



## **Executive summary**

Fewer than one-in-five Canadians have heard of their government's policy to introduce plain packaging and could explain it to a friend or family member.

With under a month to completion, fewer than 1 in 10 Canadians knew about the government's consultation on plain packaging (had heard about and could explain the government's consultation to a friend or family member).

When asked, the majority of all Canadians think the introduction of plain packaging is unnecessary (54%). Almost twice the number (30%) who think it is necessary.

When asked, the majority of all Canadians (56%) think the introduction of plain packaging is not a good use of government resources. More than twice the number (27%) who thought it was a good use of government resources.

More than 7 in 10, both Canadians overall (71%) and regular smokers (78%), think the move to plain packaging will not reduce smoking.

The vast majority (72%) believe the public consultation should have been longer than 3 months.

55% of all Canadians, 64% of those from the Quebec region and 65% of regular smokers believe plain packaging will lead to an increase in fake cigarettes and the amount of illegal cigarettes sold.

Only a minority (20%) of all Canadians believe that introducing plain packaging won't lead to an increase in fake packaging and the amount of illegal cigarettes sold.

The vast majority (81%) of all Canadians believe that before any policy change to plain packaging that the government should state the likely costs to the taxpayer.



The vast majority (70%) of all Canadians believe that before any policy change to plain packaging that the government should state the target for the reduction in smoking and the date by which it will be achieved.

Even though the government may have good intentions, 79% of Canadians still believe that the government should still keep an open-mind and weigh up both sides of the argument for and against plain packaging.

In the absence of scientific evidence or research that plain packaging will reduce smoking in Canada, the vast majority (85%) of all Canadians believe that the government should either put the decision on plain packaging on hold or not proceed at all.

The majority (61%) of all Canadians wouldn't support the idea of plain packaging being extended to other products regarded as harmful for health (beer, wine, soft drinks, fast food etc)

41% of Canadians believe that plain packaging is likely to extend to other products regarded as harmful to health (beer, wine, soft drinks, fast food etc) vs 45% of Canadians believe unlikely. The majority of regular smokers (58%) think the extension of plain packaging to other products is likely.

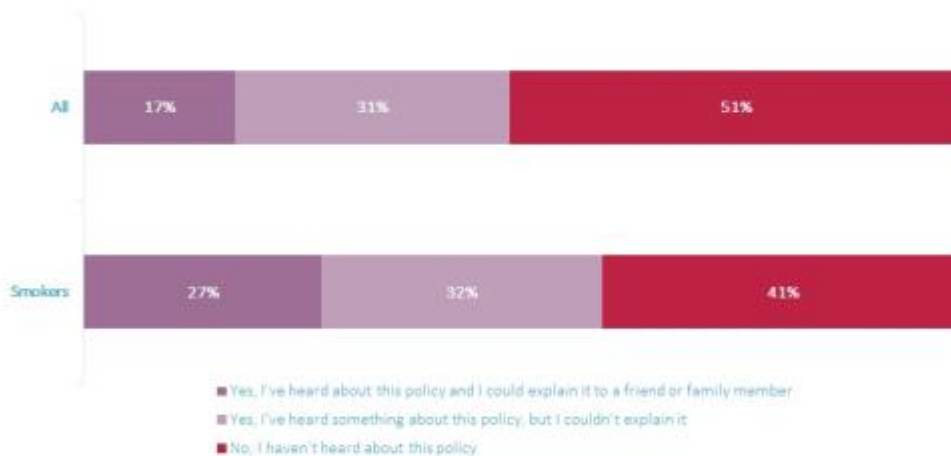
The majority of all Canadians (53%) think that if smoking is legal, and there are restrictions in place about where smoking is allowed, that smokers should be treated as fairly in Canada as any other group of consumers. This is in contrast to the 32% minority of Canadians who disagree with this statement.



## Cigarette Plain Packaging Survey Findings

**Fewer than one-in-five Canadians have heard of their government's policy to introduce plain packaging and could explain it to a friend or family member.**

Have you heard of the federal government policy to further change all cigarette packaging to 'plain' packaging?



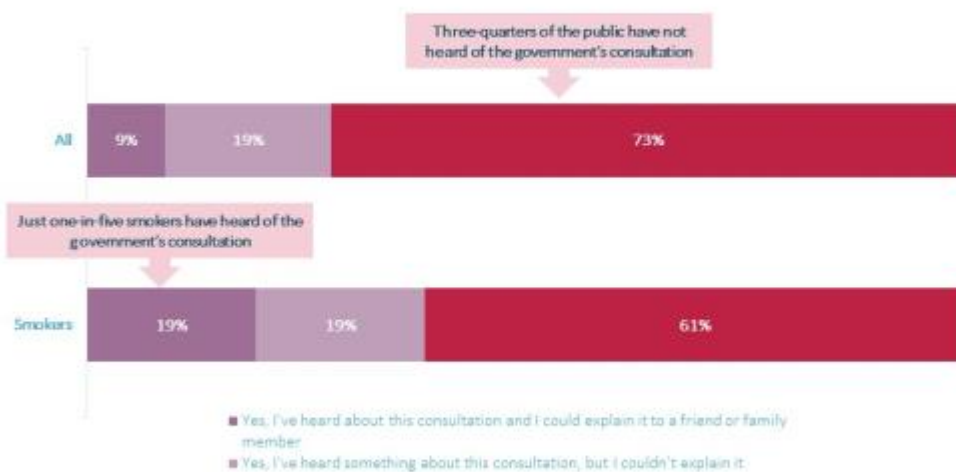
1. Base: All (2,301); Regular smokers (289)  
2. Q2

- Only 17% of all Canadians were aware and could explain plain packaging to friends or family. For regular smokers, it was higher, but only just over a quarter (27%) were aware and could explain it to friends or family.
- More than half (51%) of all Canadians had not heard at all about the plain packaging policy. For regular smokers, 41% were also totally unaware.
- About a third of all Canadians (31%) and regular smokers (32%) had heard of the phrase plain packaging, but could not explain it.



## With under a month to completion, fewer than 1 in 10 Canadians had even heard of and could explain the government's consultation on plain packaging.

The federal government is carrying out a public consultation on 'plain' packaging for cigarettes. Have you heard anything about this consultation?



1. Base: All (2,301); Regular smokers (289)  
2. Q3

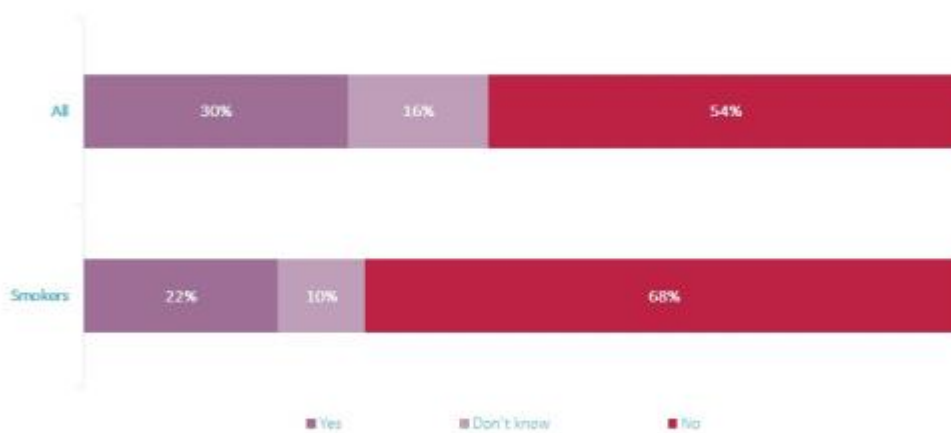
- Three-quarters of the public (73%) had not heard of the public consultation. The vast majority of regular smokers (61%) also had not heard of the consultation.
- 19%, for both all Canadians and regular smokers, said they had heard of the consultation, but couldn't explain it.
- Only 9% of all Canadians and 19% of regular smokers had heard of the consultation and could explain it to friends or family.





**When asked, the majority of all Canadians think the introduction of plain packaging is unnecessary (54%). Almost twice the number (30%) who think it is necessary.**

On balance, do you believe that the introduction of 'plain' packaging or 'mandatory standardized packaging' is **necessary**?



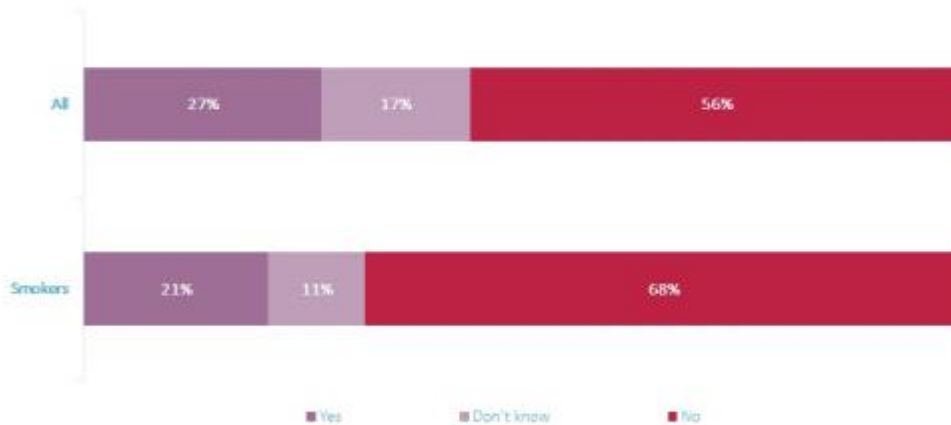
1. Base: All (2,301); Regular smokers (289)  
2. Q4

- 54% of all Canadians think the introduction of plain packaging is unnecessary, 30% necessary and 16% don't know.
- 68% of regular smokers think the introduction is unnecessary, 22% necessary and 10% don't know.



**When asked, the majority of all Canadians (56%) think the introduction of plain packaging is not a good use of government resources. More than twice the number (27%) who thought it was a good use of government resources.**

On balance, do you believe that the introduction of 'plain' packaging or 'mandatory standardized packaging' is **a good use of government resources?**



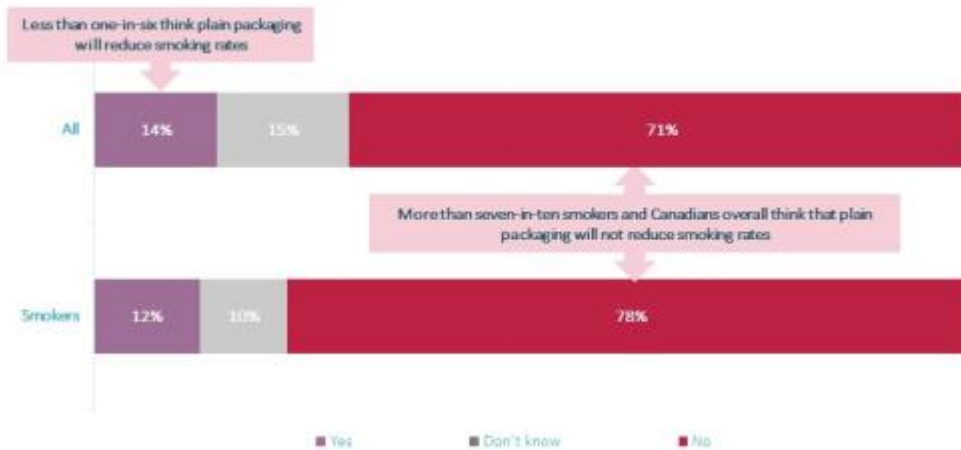
1. Base: All (2,301); Regular smokers (289)  
2. Q4

- 56% of all Canadians think the introduction of plain packaging is not a good use of government resources vs 27% who think it is a good use of government resources. 17% don't know.
- This rises to 68% of regular smokers who think the introduction of plain packaging isn't a good use of government resources vs 21% who think it is a good use of government resources and 11% who don't know.



**More than 7 in 10, both Canadians overall (71%) and regular smokers (78%), think the move to plain packaging will not reduce smoking.**

Do you think a move to 'plain' packaging will reduce smoking rates?



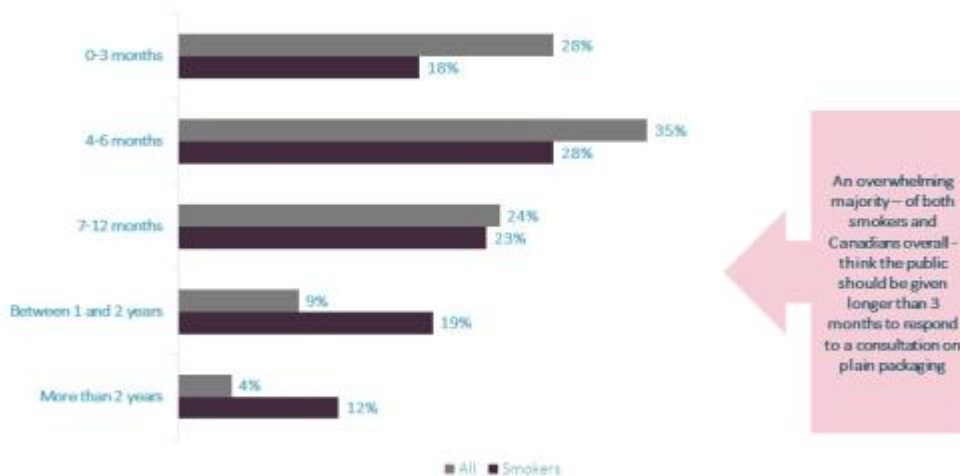
1. Base: All (2,301); Regular smokers (289)  
2. OS

- 71% of all Canadians believe the move to plain packaging won't reduce smoking vs only 14% who think it will reduce smoking. 15% don't know.
- 78% of regular smokers believe the move to plain packaging won't reduce smoking vs only 12% of regular smokers who think it will reduce smoking. 10% don't know.



## The vast majority (72%) believe the public consultation should have been longer than 3 months.

In your view, how long should the public be given to respond to the consultation on 'plain' packaging, in order to ensure that all views are given a fair hearing?



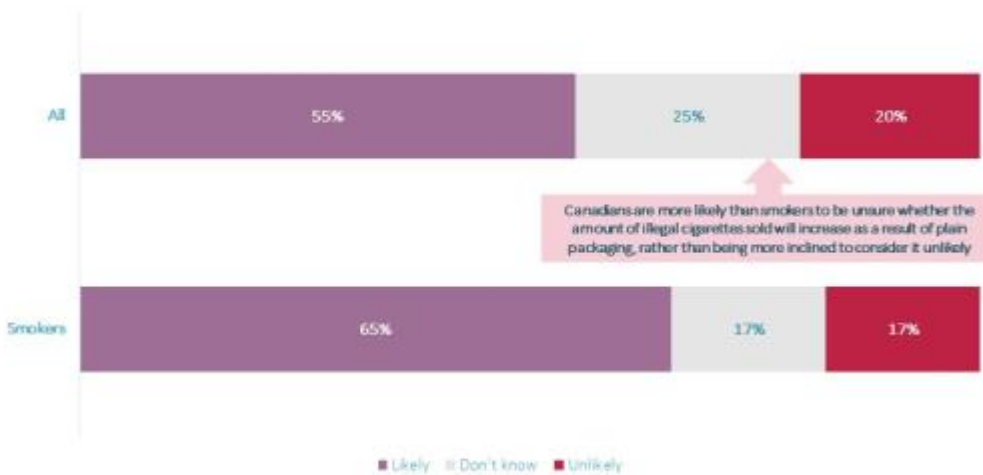
1. Base: All (2,301); Regular smokers (289)  
2. Q6

- Only 28% of Canadians thought the public consultation should be 0-3 months. The vast majority believed it should be longer. A weighted average of responses would suggest twice as long at 7.4 months.
- Smokers' views were stronger that the consultation should be longer. Only 18% of regular smokers thought it should be 0-3 months. 82% of regular smokers thought the consultation should be longer than 3 months.



## Only a minority (20%) of all Canadians believe that introducing plain packaging won't lead to an increase in fake packaging and the amount of illegal cigarettes sold.

Some people say that a change to 'plain' packaging from multiple different brand designs will make it easier to produce fake cigarette packaging and increase the amount of illegal cigarettes sold in Canada. Do you think this is likely or unlikely?



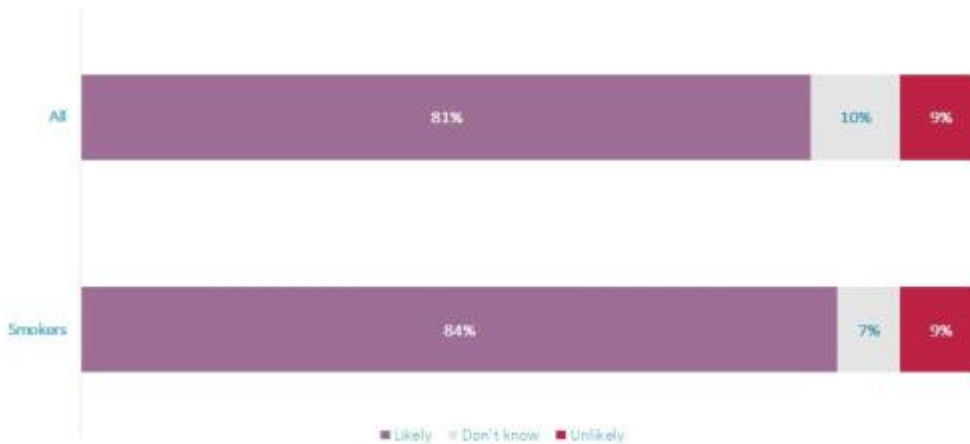
1. Base: All (2,301); Regular smokers (289)  
2. Q7

- 55% of all Canadians believe plain packaging will lead to an increase in fake cigarettes and the amount of illegal cigarettes sold vs only 20% who believe it won't increase fake cigarettes and sale of illegal cigarettes. 25% don't know.
- In the province of Quebec it rises to be 64% believe plain packaging will lead to an increase in fake cigarettes and the amount of illegal cigarettes sold.
- Regular smokers (65%) have a higher belief that plain packaging will lead to an increase in fake cigarettes and the amount of illegal cigarettes sold vs only 17% of regular smokers who believe it won't increase fake cigarettes and sale of illegal cigarettes. 17% of regular smokers don't know.



**The vast majority (81%) of all Canadians believe that before any policy change to plain packaging that the government should state the likely costs to the taxpayer.**

The introduction of 'plain' packaging may have associated costs that will come out of available government funds for other areas. These might include the costs of setting up the change and the potential loss in tax revenue if there is an increase in illegal cigarettes. Before any policy change to 'plain' packaging, should the government be expected to **clearly state the likely costs to the taxpayer?**

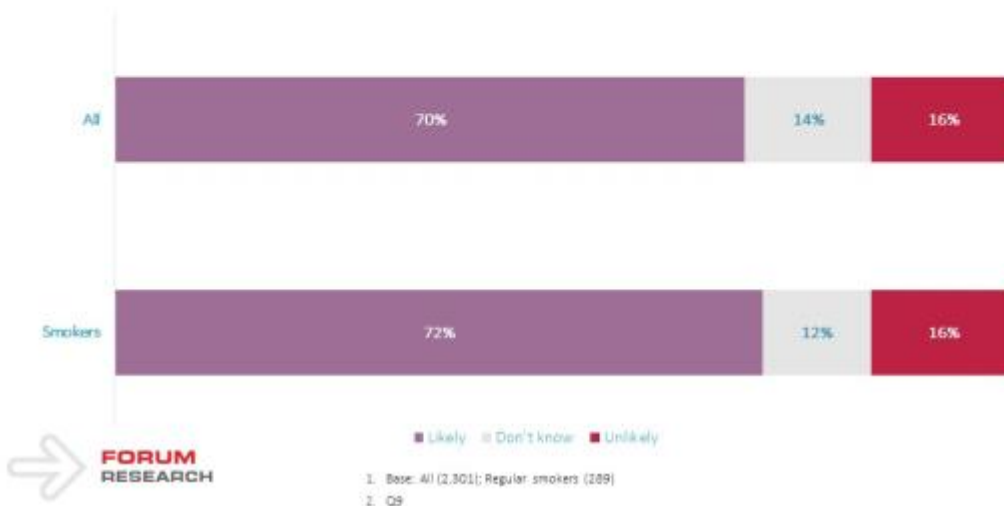


- 81% of all Canadians believe before any policy change for plain packaging the government should state the likely cost to the taxpayer. Only 9% of all Canadians think they shouldn't state cost to taxpayers in advance. 10% don't know.
- 84% of regular smokers believe before any policy change for plain packaging the government should state the likely cost to the taxpayer. Only 9% of regular smokers think they shouldn't state cost to taxpayers in advance. 7% don't know.



**The vast majority (70%) of all Canadians believe that before any policy change to plain packaging that the government should state the target for the reduction in smoking and the date by which it will be achieved.**

The introduction of 'plain' packaging may have associated costs that will come out of available government funds for other areas. These might include the costs of setting up the change and the potential loss in tax revenue if there is an increase in illegal cigarettes. Before any policy change to 'plain' packaging, should the government be expected to **state the target level of reduction in smoking, and the date by which they wish to achieve it?**

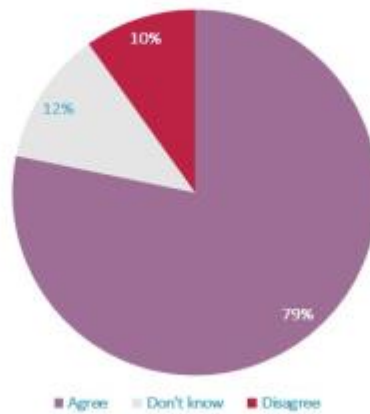


- 70% of all Canadians believe that before any policy change for plain packaging the government should state the target for the reduction in smoking and the date by which it will be achieved. Only 16% of all Canadians think they don't need to state a target for the reduction on smoking or the date by which it will be achieved. 14% don't know.
- 72% of regular smokers believe that before any policy change for plain packaging the government should state the target for the reduction in smoking and the date by which it will be achieved. Only 16% of regular smokers think they don't need to state a target for the reduction on smoking or the date by which it will be achieved. 12% don't know.



**Even though the government may have good intentions, 79% of Canadians still believe that the government should still keep an open-mind and weigh up both sides of the argument for and against plain packaging.**

Do you agree or disagree that, while the government may have good intentions when proposing this policy, it is important that any consultation keeps an open-mind and weighs up both sides of any argument for or against 'plain' packaging for cigarettes?  
[Showing % agree-disagree]



1. Base: All (2,301)  
2. Q10

- 79% of Canadians believe that even while the government may have good intentions, they should still keep an open-mind and weigh up both sides of the argument for and against plain packaging. N.B. 77% of regular smokers have this view and the difference between all Canadians and regular smokers is not statistically significant.





**In the absence of scientific evidence or research that plain packaging will reduce smoking in Canada, the vast majority (85%) of all Canadians believe that the government should either put the decision on plain packaging on hold or not proceed at all.**

If after the consultation, the government cannot show scientific evidence or research that 'plain' packaging will reduce smoking in Canada, what in your view should the government do?



1. Base: All (2,301); Regular smokers (209)  
2. Q11

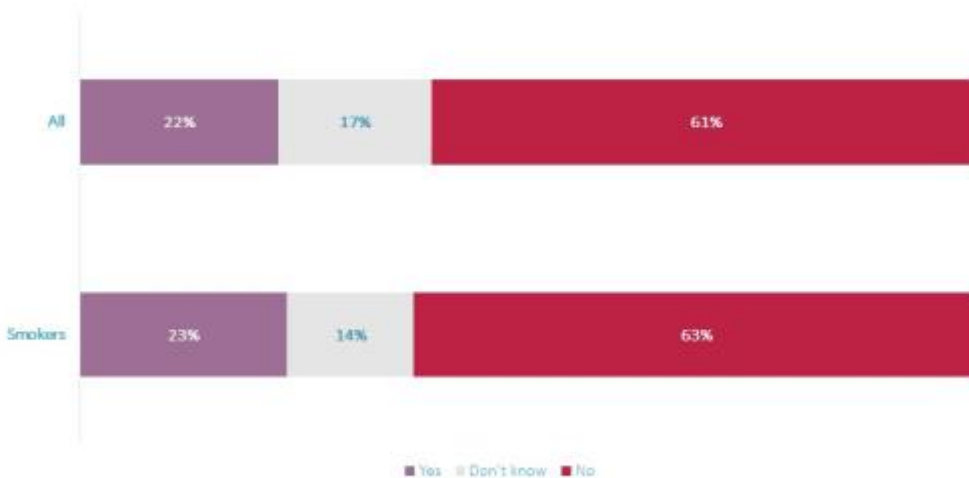
If after the consultation, the government cannot show scientific evidence or research that 'plain' packaging will reduce smoking in Canada:

- Only 15% of all Canadians and 11% of regular smokers believe the government should continue regardless.
- 22% of all Canadians and 17% of regular smokers believe the government should wait and review after evidence from UK implementation.
- 10% of Canadians and 14% of regular smokers believe the government should extend the consultation until enough evidence is found to make a fair decision.
- Over a quarter of all Canadians (28%) and regular smokers (26%) believe it should put the decision on hold and prioritize other policies.
- A quarter of all Canadians (25%) and 33% of regular smokers believe the government should not proceed with the policy.



**The majority (61%) of all Canadians wouldn't support the idea of plain packaging being extended to other products regarded as harmful for health (beer, wine, soft drinks, fast food etc)**

Would you support the idea of 'plain' packaging being extended to other products that could be regarded as harmful to health (beer, wine, soft drinks, fast food, etc.)?



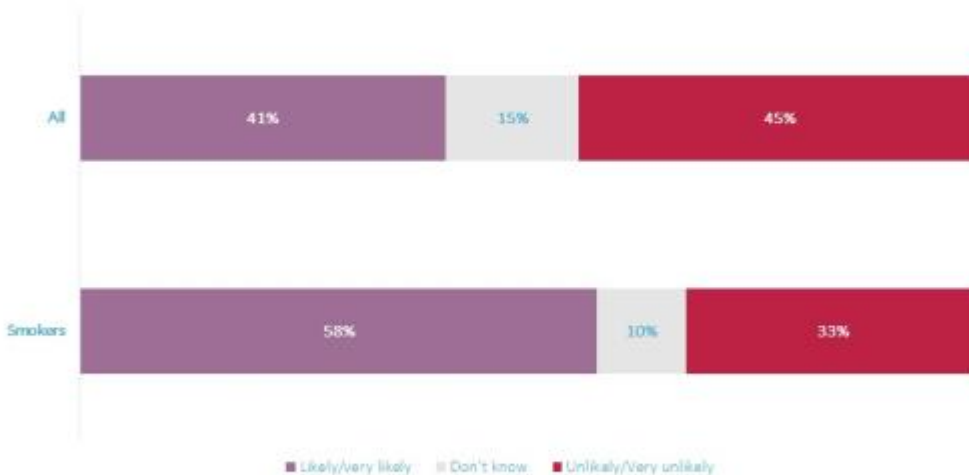
1. Base: All (2,301); Regular smokers (289)  
2. Q13

- 61% of all Canadians wouldn't support plain packaging being extended to other products regarded as harmful to health vs only 22% who would. 17% don't know.
- 63% of regular smokers wouldn't support plain packaging being extended to other products regarded as harmful to health vs only 23% who would. 14% don't know.



**41% of Canadians believe that plain packaging is likely to extend to other products regarded as harmful to health (beer, wine, soft drinks, fast food etc) vs. 45% of Canadians believe it is unlikely. The majority of regular smokers (58%) believe the extension of plain packaging to other products is likely.**

If 'plain' packaging was introduced for cigarettes, how likely do you think it would be that at some point in the future the policy idea would be extended to other products that could be regarded as harmful to health (beer, wine, soft drinks, fast food, etc.)?



1. Base: All (2,301); Regular smokers (209)  
2. Q12

- 58% of regular smokers believe it is likely plain packaging will be extended to other products regarded as harmful to health (beer, wine, soft drinks, fast food etc). 20% think very likely. Only 33% of regular smokers think this extension is unlikely. 10% of regular smokers don't know.
- 41% of all Canadians think it is likely plain packaging will be extended to other products regarded as harmful to health (beer, wine, soft drinks, fast food etc). 10% very likely. Views are split and 12% of all Canadians think it is very unlikely plain packaging will be extended to other products. 45% of all Canadians think unlikely. 15% don't know.

**The majority of all Canadians (53%) think that if smoking is legal, and there are restrictions in place about where smoking is allowed,**



**that smokers should be treated as fairly in Canada as any other group of consumers. This is in contrast to the 32% minority of Canadians who disagree with this statement.**

If smoking is legal, and there are restrictions in place about where smoking is allowed, do you believe that smokers should be treated as fairly in Canada as any other group of consumers?



1. Base: All (2,301); Regular smokers (209)  
2. Q14

- 53% of Canadians think that if smoking is legal, and there are restrictions in place about where smoking is allowed, that smokers should be treated as fairly in Canada as any other group of consumers. 16% of Canadians don't know. 32% disagree with this statement.
- 80% of regular smokers agree that if smoking is legal, and there are restrictions in place about where smoking is allowed, that smokers should be treated as fairly in Canada as any other group of consumers. 9% of regular smokers don't know. 11% of regular smokers disagree with this statement.