



ILLICIT MONITOR

Period Ending December 10, 2016

Date: January 13th, 2017

METHODOLOGY

What?



Continuous Online Tracking study

Who?



Adult smokers

(At least 19 years and 7 months old)

When?



**Current reporting period = December 2015 – December 2016
(period ending December 10, 2016)**

Where?



Ontario (sample size = ~ 500 per month)

Note: Generally, people tend to under-report socially undesirable beliefs, but may also over-report behaviours that are socially desirable. When thinking about the validity of the online methodology in capturing illicit tobacco usage, the online methodology actually provides a certain anonymity to the respondents that favours more truthful reporting relative to an interviewer administered phone survey.

ILLCIT SUMMARY:

Ontario (P7D Share: 32%)

After seeing spikes in illicit P7D share in August and September (39% and 36% respectively), Q4 2016 share has been stable at 32%.

In GTA Illicit P7D share remains high at 24%. Fluctuation in GTA illicit performance are largely driven by changes in amounts bought on reservations.

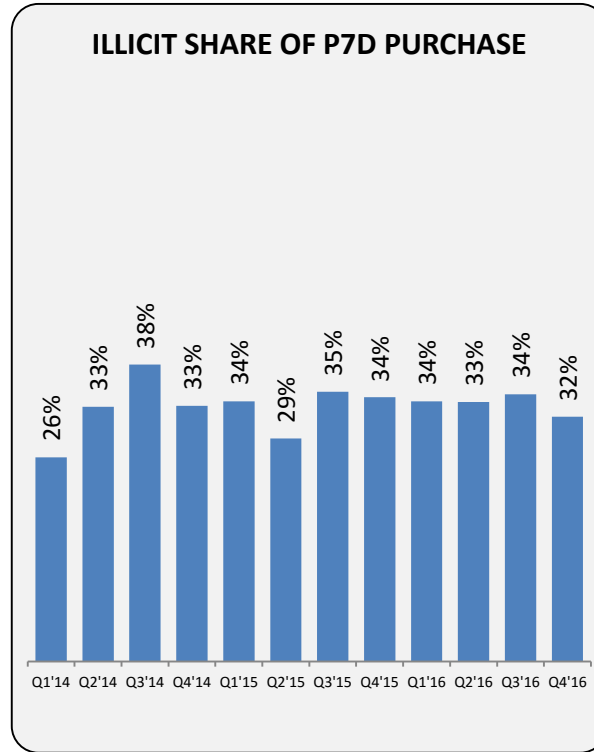
Definitions:

P7D SHARE = Share of past seven days purchase (based on total volume of sticks purchased)



ONTARIO

ILLCIT – ONTARIO – QUARTERLY

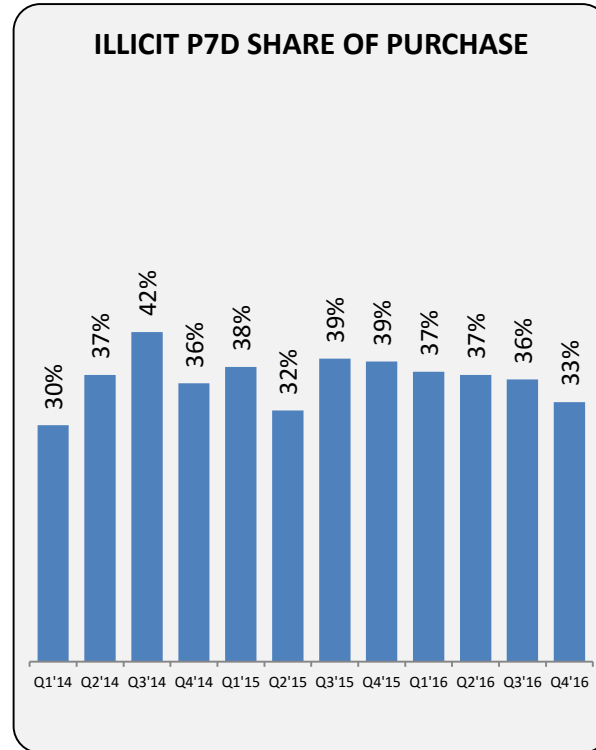


A slight drop in P7D purchase share for Illicit as 4 week September number is replaced with a lower 4 week December number.



REST OF ONTARIO

ILLICIT – ROO – QUARTERLY

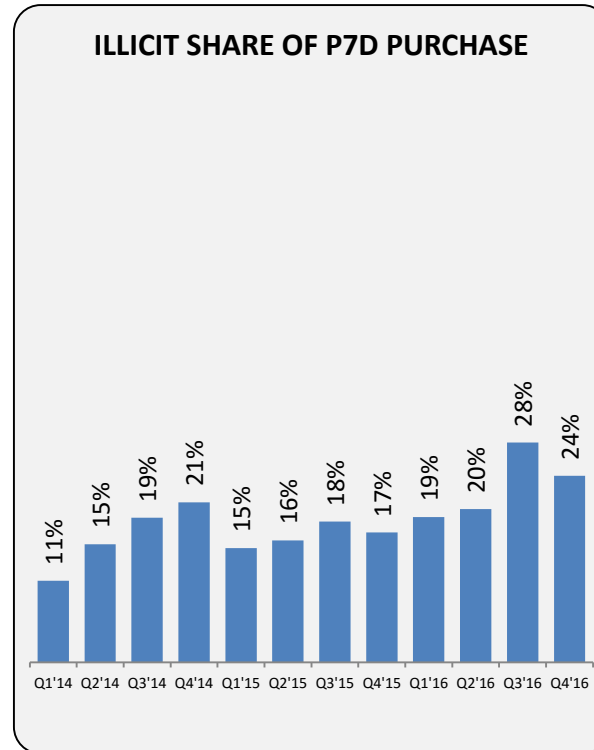


ROO= Rest of Ontario (Ontario excluding GTA)

Illicit P7D share in ROO continues its slow decline.

GTA

GTA – QUARTERLY

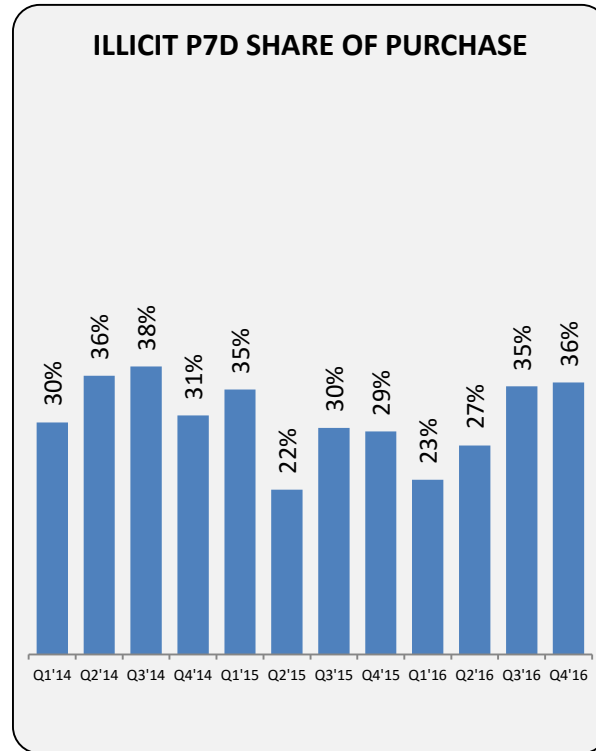


GTA – Q4 2016 Illicit P7D purchase is down slightly as the spike we saw in September 4 weekly is replaced by a lower December number.



OTTAWA / EASTERN ONTARIO

OTTAWA / EASTERN ONTARIO – QUARTERLY

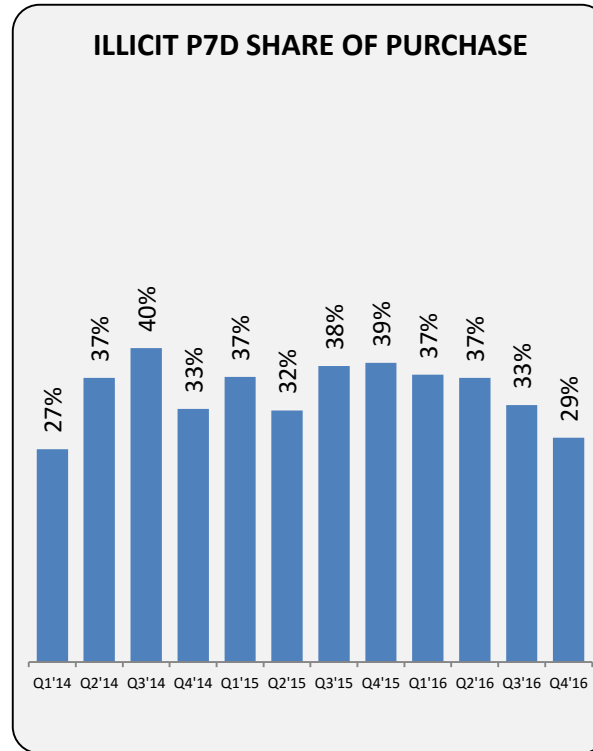


Ottawa – Little change from Q3 to Q4 2016.



SOUTHERN ONTARIO

SOUTHERN ONTARIO – QUARTERLY

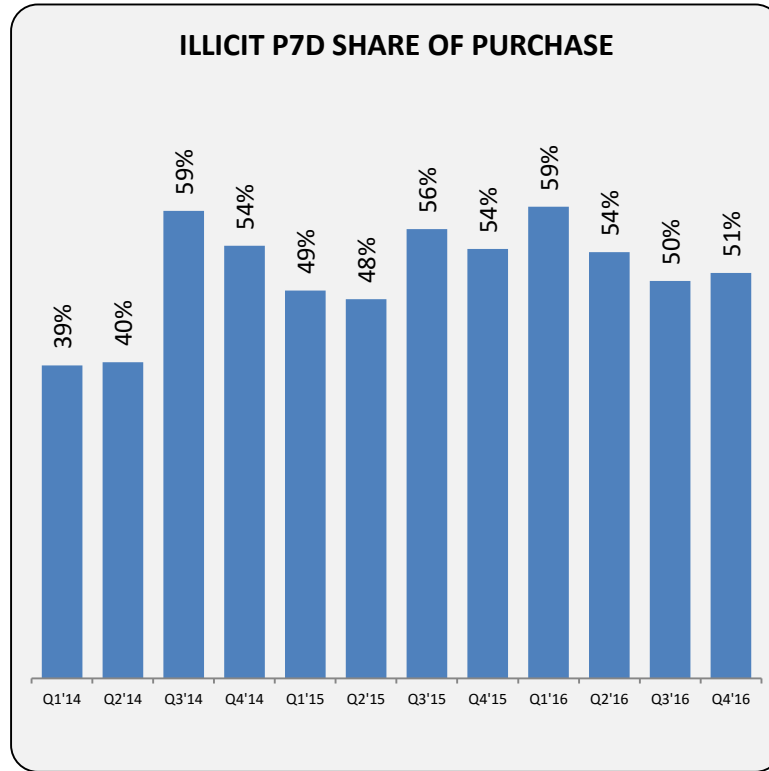


Southern Ontario P7D share for Q4 2016 fell as the spike from the August period is removed from the number.



NORTHERN ONTARIO

NORTHERN ONTARIO – QUARTERLY



Northern Ontario –P7D share remains high at 51%