



# ILLICIT MONITOR

Period Ending August 18, 2018

Date: September 14, 2018

## METHODOLOGY

What?



**Continuous Online Tracking study**

Who?



**Adult smokers**

(At least 19 years and 7 months old)

When?



**Current reporting period = September 2017– August 2018  
(period ending August 18, 2018)**

Where?



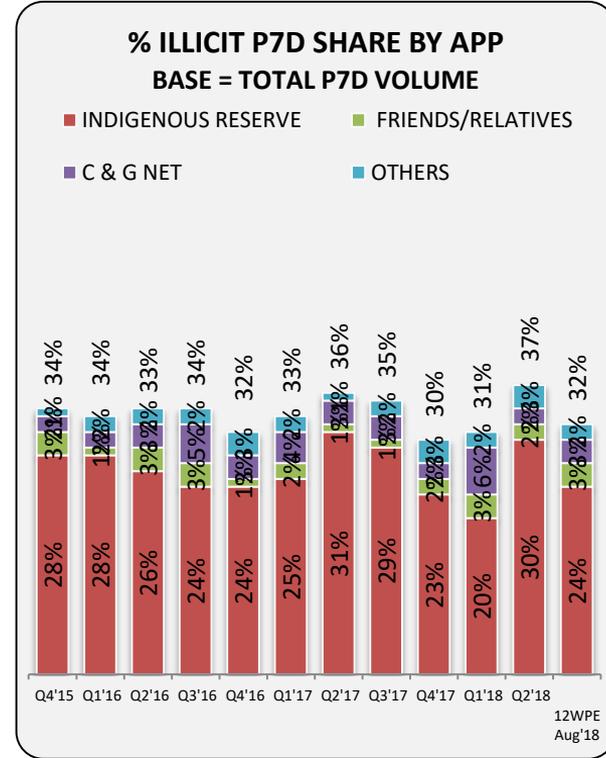
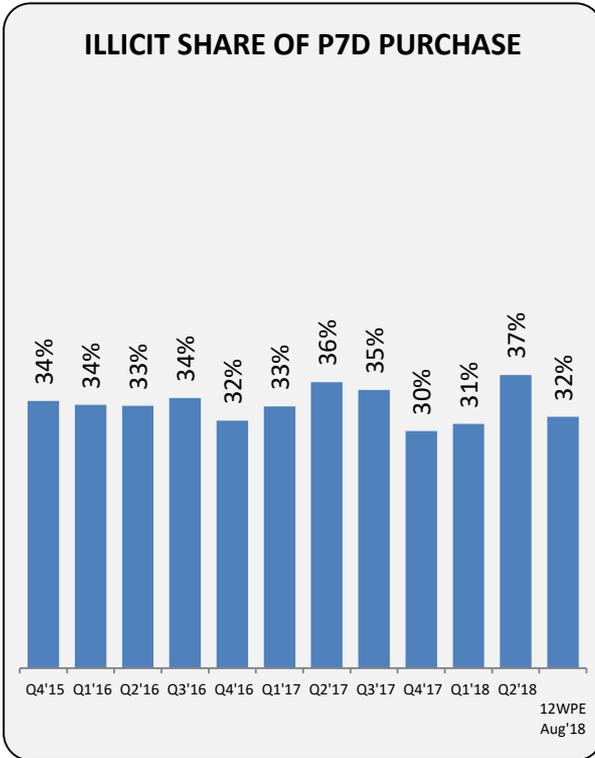
**Ontario (sample size = ~ 500 per month)**

*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.*



# ONTARIO

# ILLICIT – ONTARIO – QUARTERLY

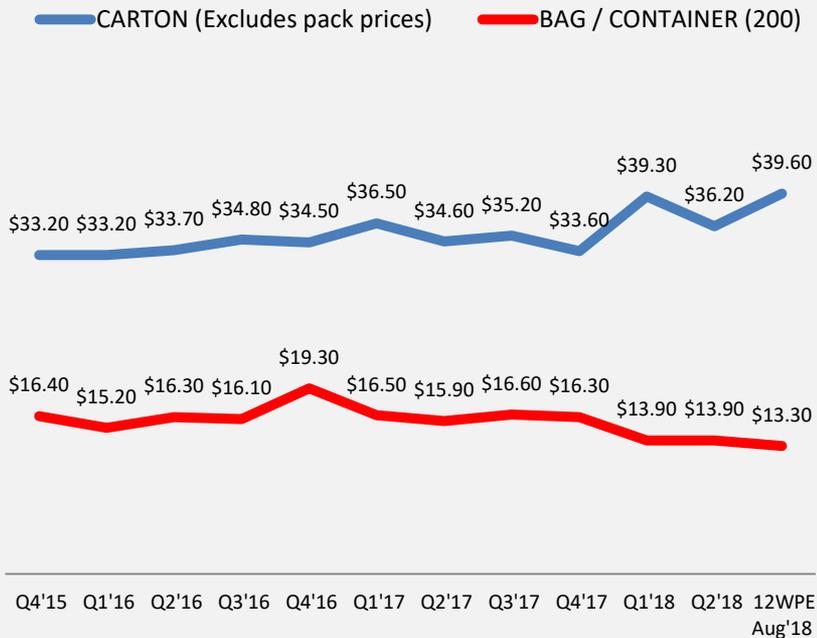


Illicit purchases in the past 7 days have dropped back to 32%

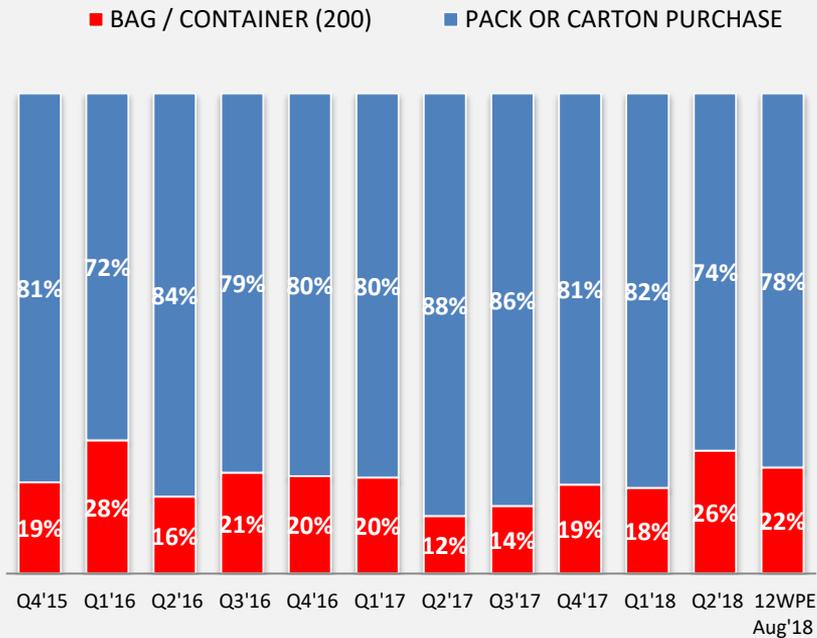
# ONTARIO – QUARTERLY



**AVERAGE ILLICIT PRICE**  
(ILLICIT REG BRD)

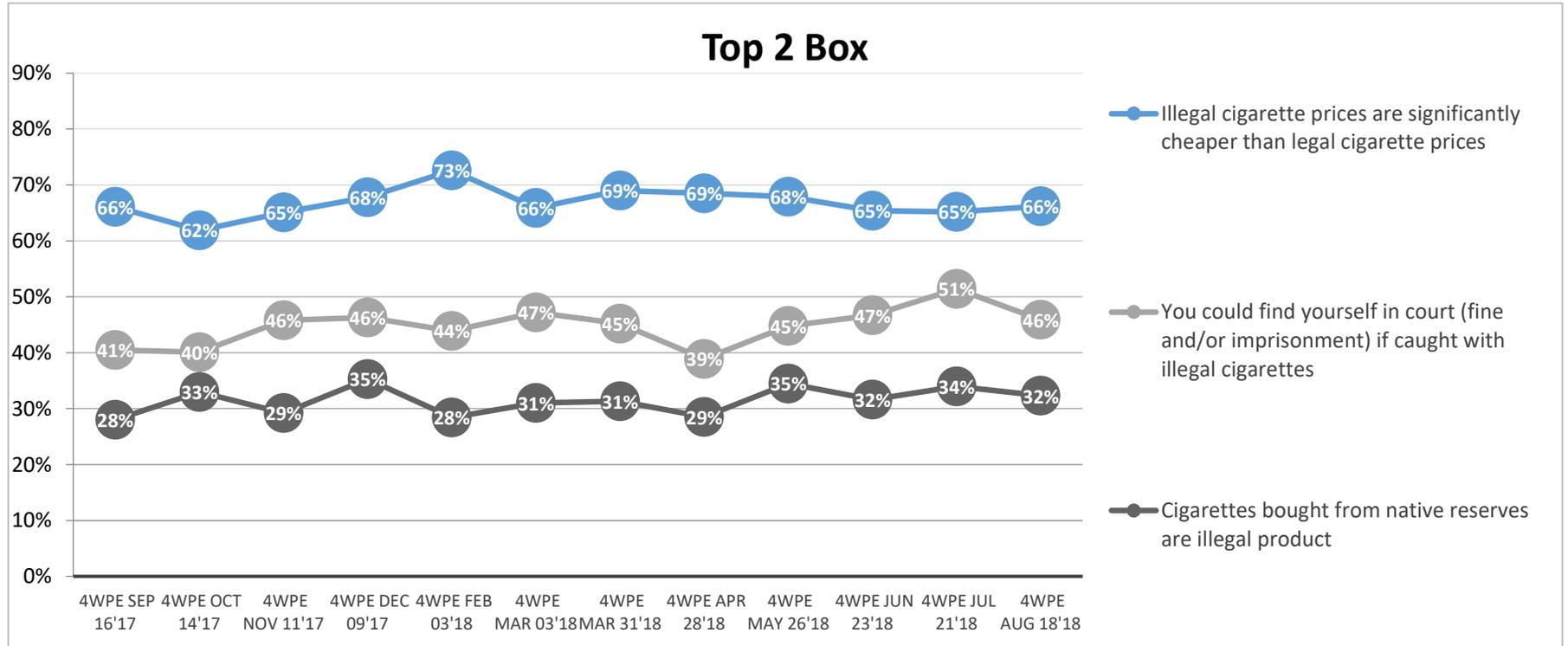


**ILLICIT FORMAT CONTRIBUTION**  
(ILLICIT REG BRD)



13 week average for carton pricing for Illicit continues to grow. Illicit pricing increases appear to be matching the price increases of legal cigarettes as reported by Stats Can where July 2018 prices were up 12.7% over July 2017. (Stats Can Table: 18-10-0004-10)

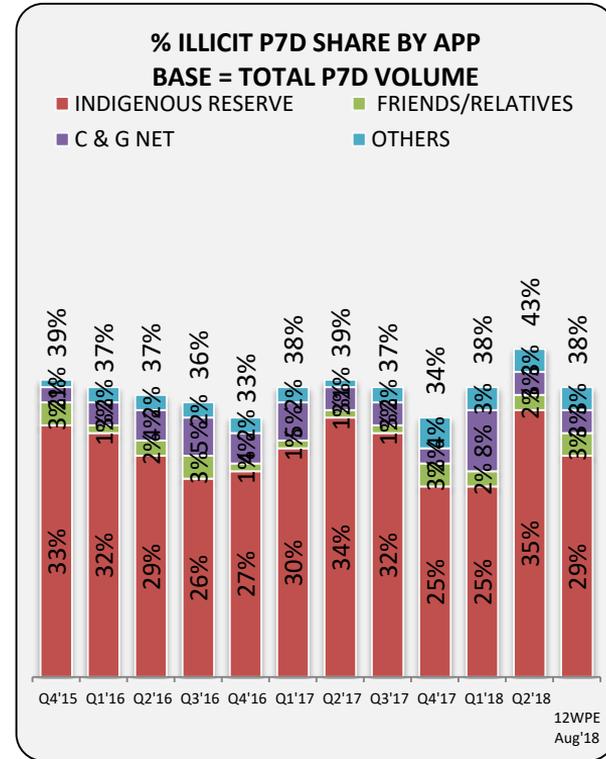
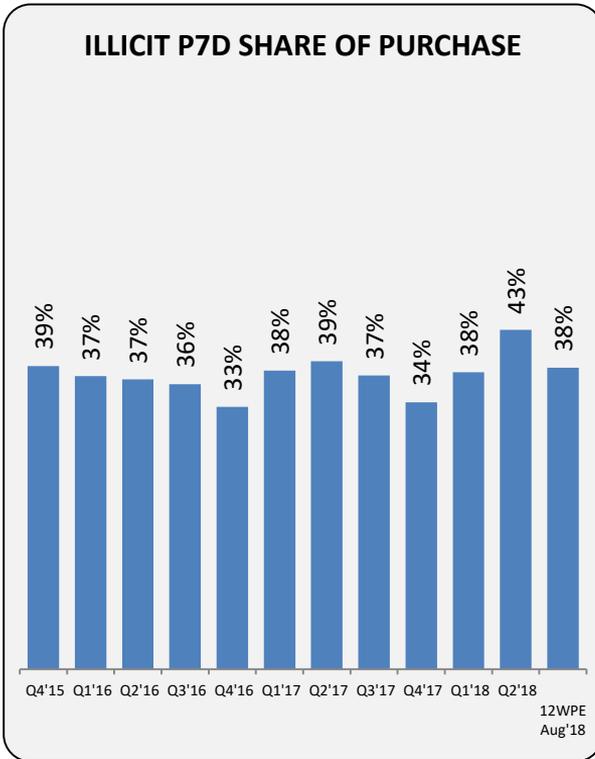
# ILLICIT ATTITUDES - ONTARIO



Although illicit prices have been going up they are still seen as being significantly cheaper than legal cigarettes.

**ROO**

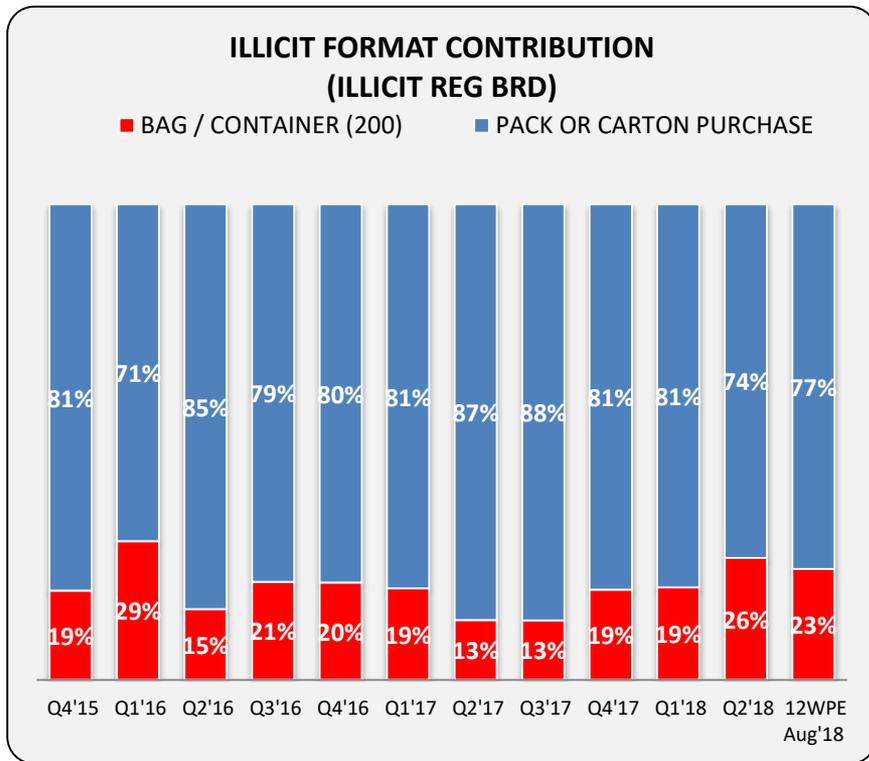
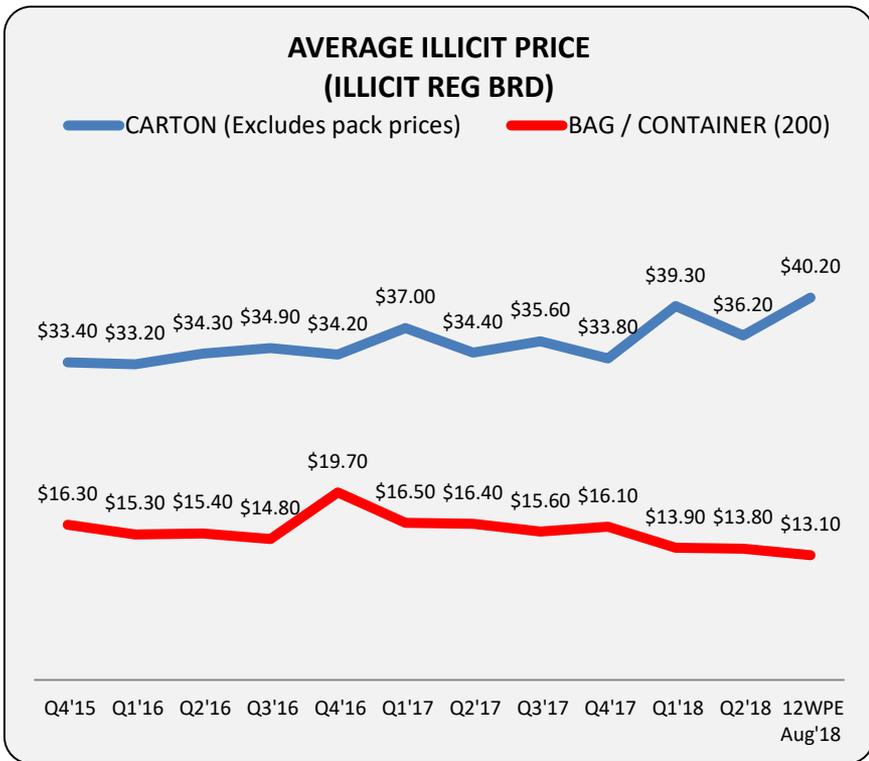
# ILLICIT – ROO – QUARTERLY



ROO= Rest of Ontario (Ontario excluding GTA)

Illicit P7D share in ROO is not showing growth in the most recent period.

# ROO – QUARTERLY

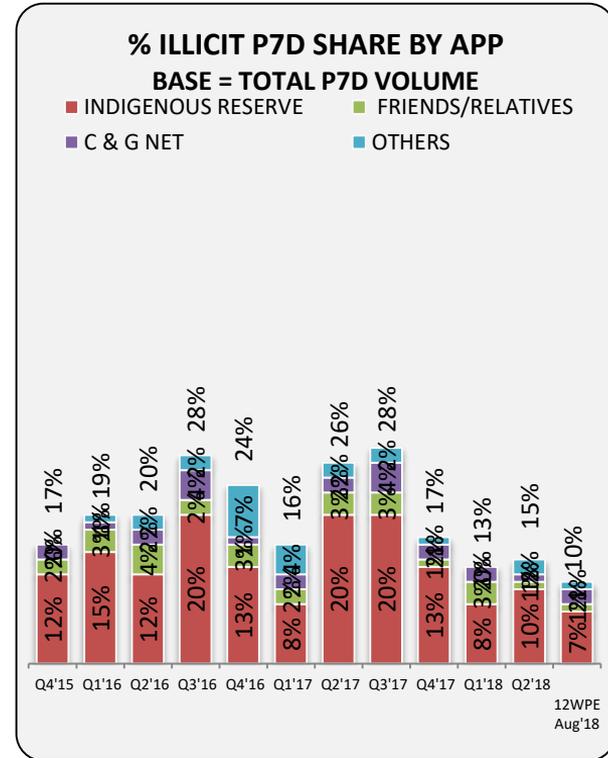
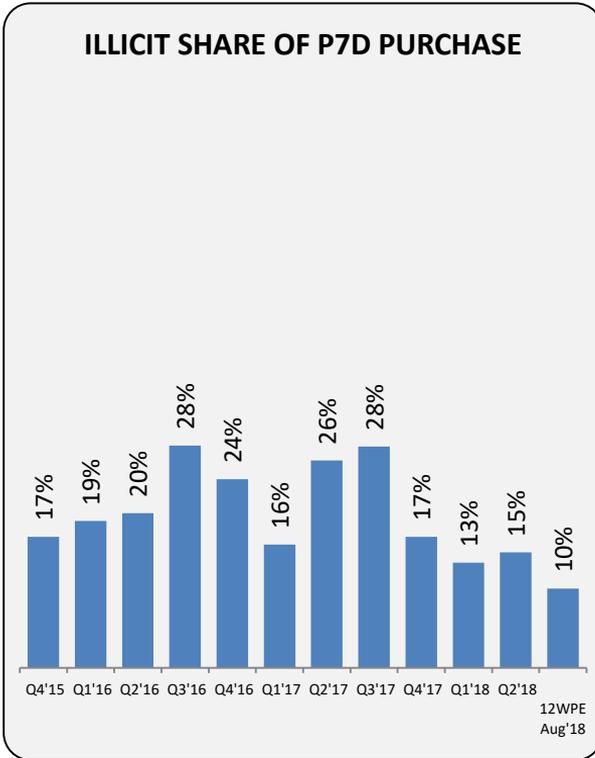


ROO= Rest of Ontario (Ontario excluding GTA)

Continued Increase in illicit carton pricing.

**GTA**

# GTA – QUARTERLY

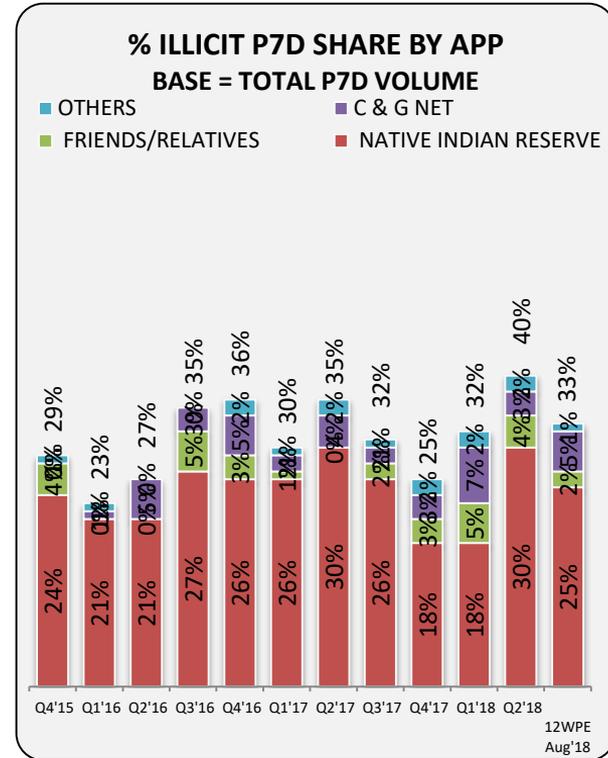
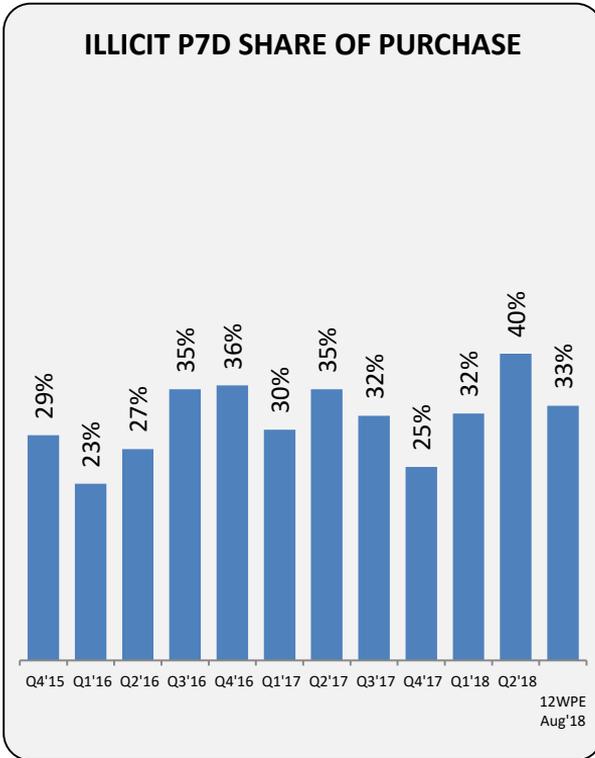


GTA – since Q4'17 P7D share has shown a drop.



# OTTAWA / EASTERN ONTARIO

# OTTAWA / EASTERN ONTARIO – QUARTERLY

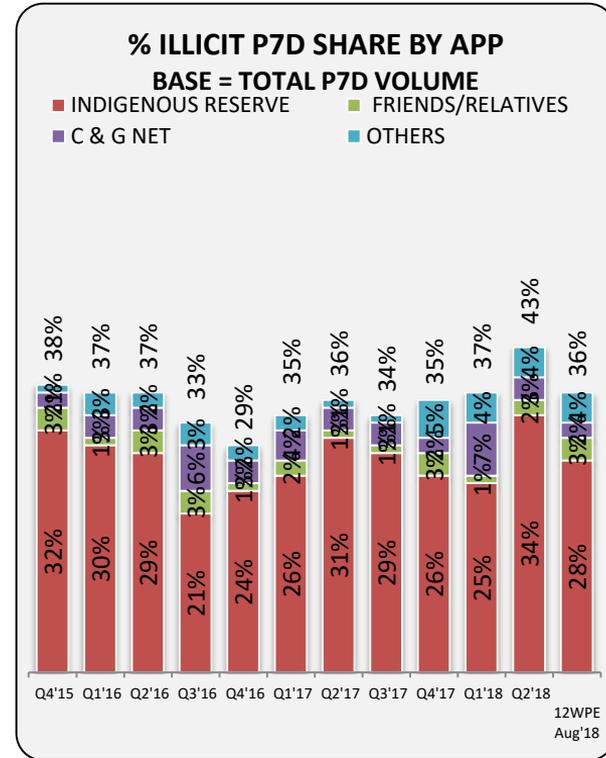
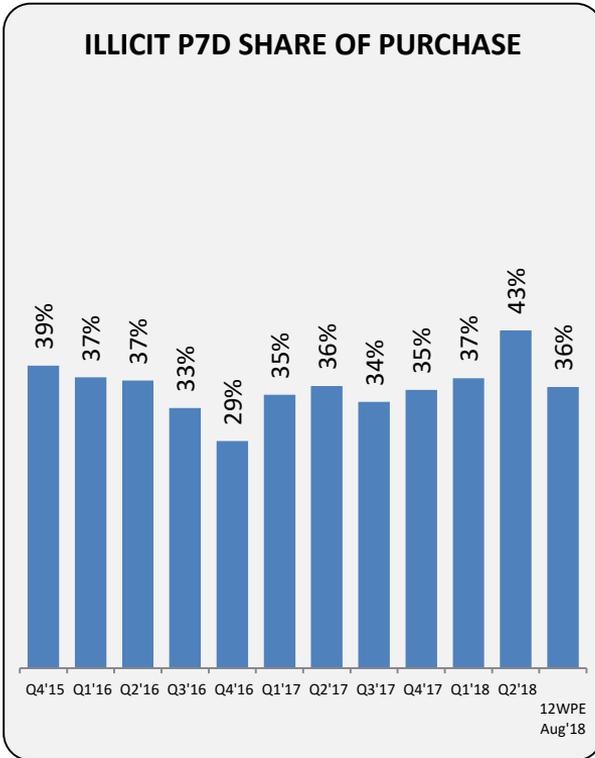


Ottawa – Illicit users continue to maintain record levels.



# SOUTHERN ONTARIO

# SOUTHERN ONTARIO – QUARTERLY

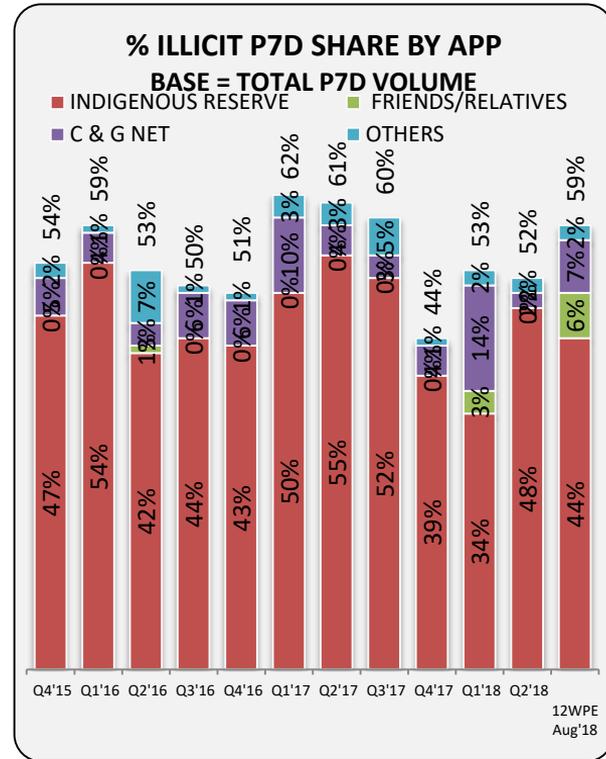
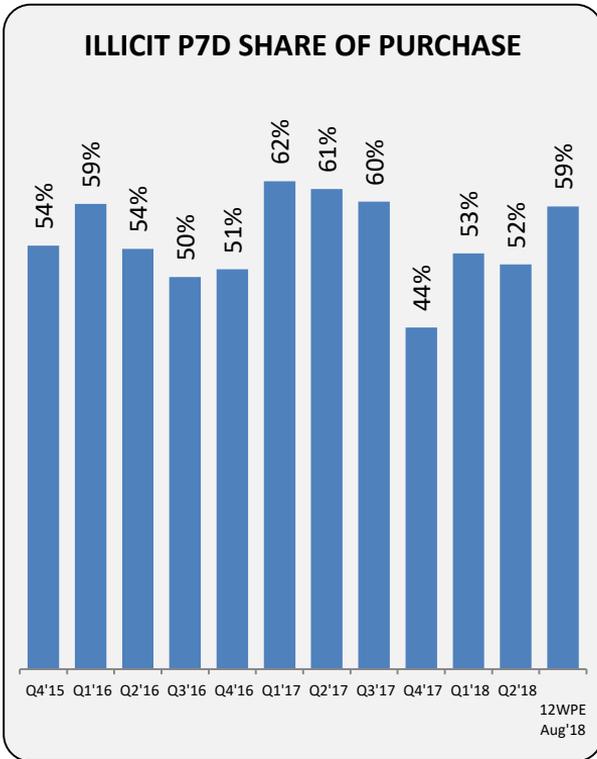


Southern Ontario P7D share number continues to be high.



# NORTHERN ONTARIO

# NORTHERN ONTARIO – QUARTERLY



Northern Ontario – Illicit recovery from Q4 2017 continuing to show in 2018.