

Convenience Store Ontario Public Opinion Survey

June 2013



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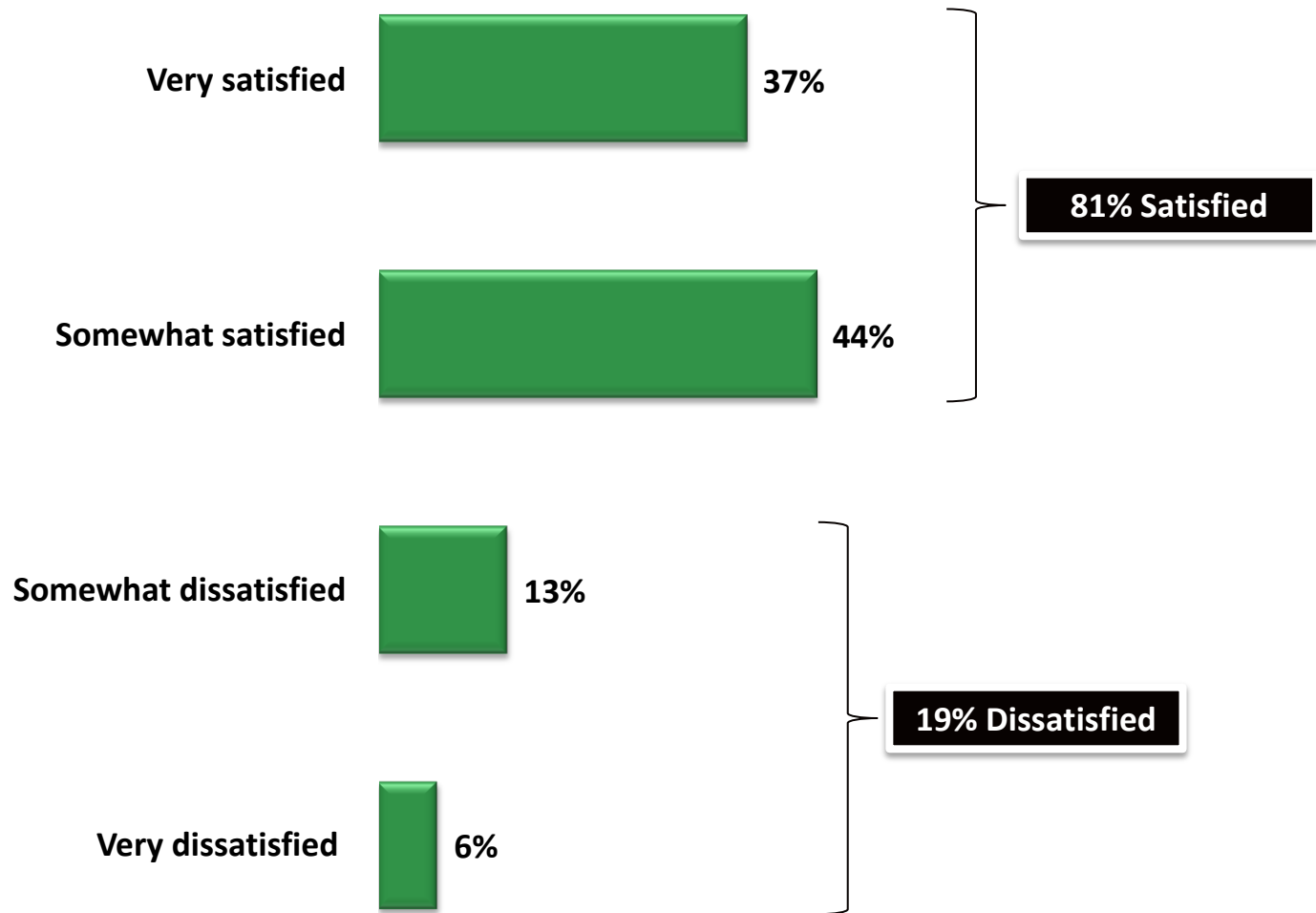
Objectives and Methodology

- Canada's National Brewers commissioned Ipsos Reid to conduct a study of Ontarians in regards to their opinion's on the province's current beer and liquor sales system and to gauge public perceptions about what they believe the potential impacts of a corner store liquor sales model would be, including potential impacts on liquor prices.
- This report presents the findings of an Ipsos Reid poll conducted from June 17th to 19th, 2013.
- For this survey, a sample of 802 adults from Ipsos' Ontario online panel was interviewed online. Weighting was then employed to balance demographics to ensure that the sample's composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe.
- The precision of Ipsos online polls are measured using a credibility interval. In this case, the poll is accurate to within +/-3.9 percentage points, 19 times out of 20, of what the results would have been had the entire population of adults in Ontario been polled.

Key Findings

Satisfaction with Current System

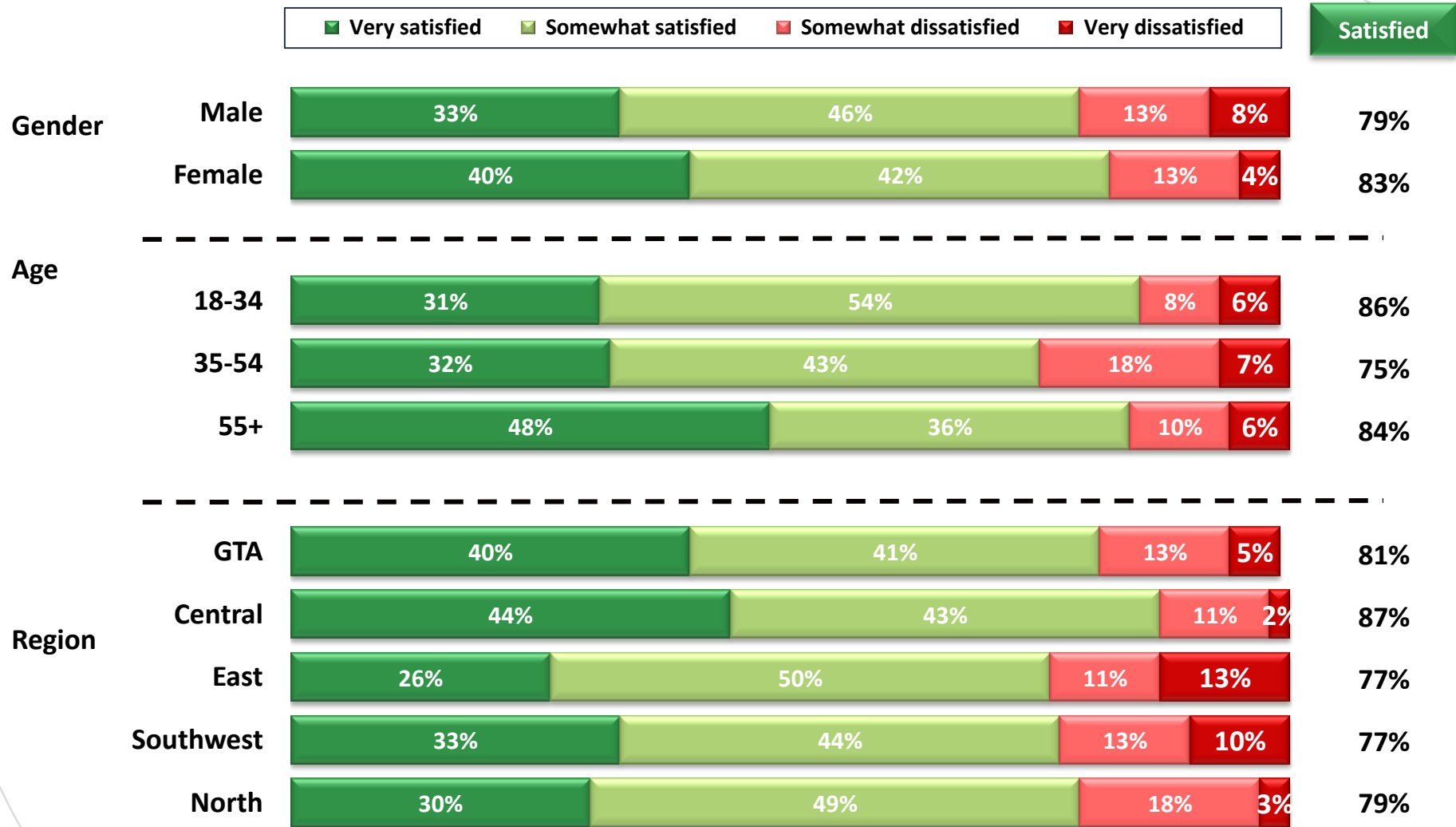
Satisfaction Level with Current Ontario Retailing System



Ontario's retailing system for beer wine and hard liquor is currently comprised of 640 Liquor Control Board of Ontario stores, 445 stores operated by The Beer Store, 465 Ontario winery retail stores and 215 rural agency stores. How satisfied would you say you presently are with that beer, wine and hard liquor retailing system?

Base: All respondents (n=801)

Satisfaction Level with Current Retailing System - Demographics



Small Base: (*)

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Base: All respondents (Male n=384; Female n=417/ 18-34 n=216; 35-54 n=320; 55+ n=265/ GTA n=281; Central n=89*; East n=110; South West n=239; North n=40*)

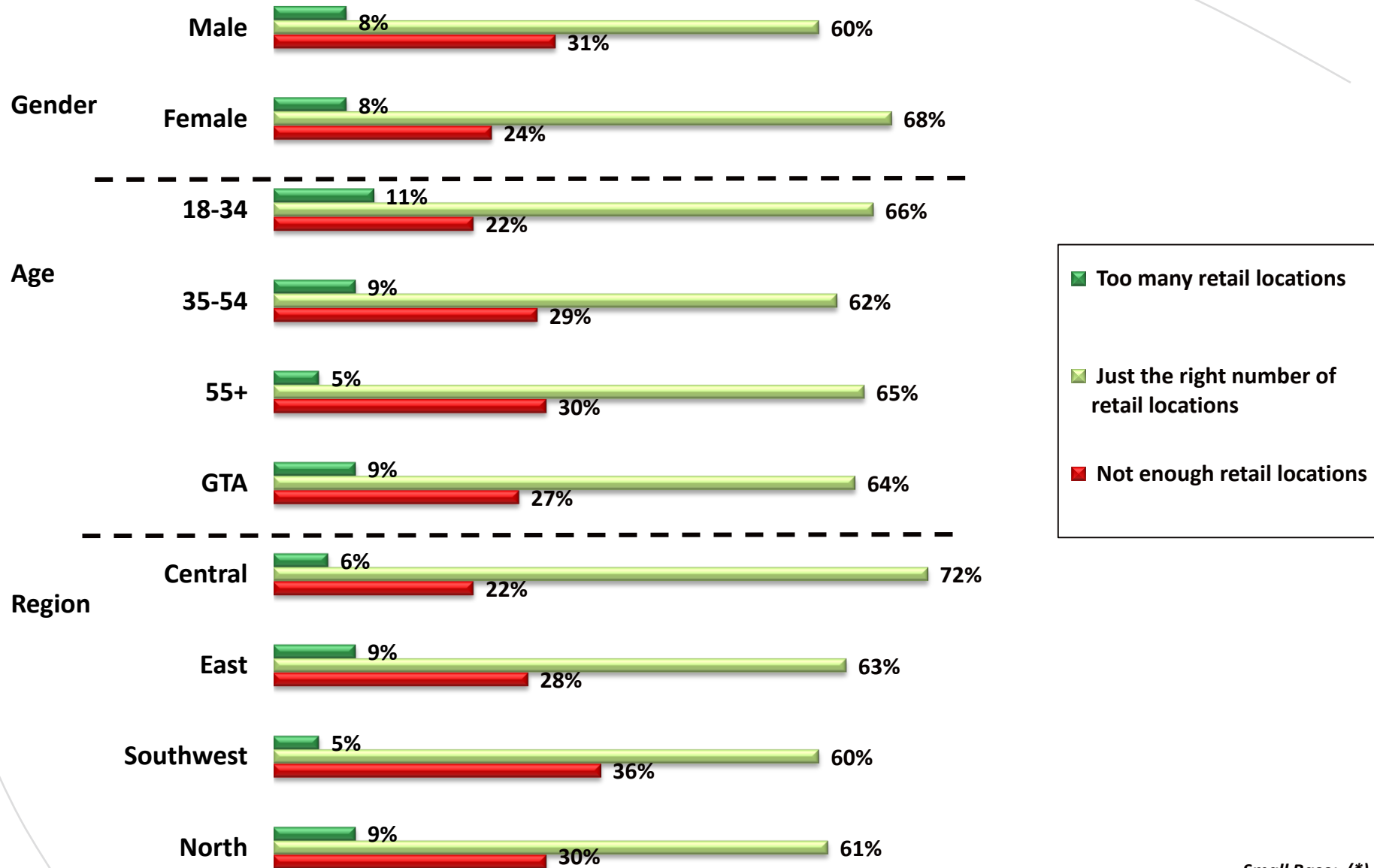
Number of Locations

Attitude Towards Number of Current Locations



Thinking about the number of retail locations in Ontario where you can currently purchase beer, wine and hard liquor, do you think Ontario has:
 Base: All respondents (n=801)

Attitude Towards Number of Current Locations - Demographics

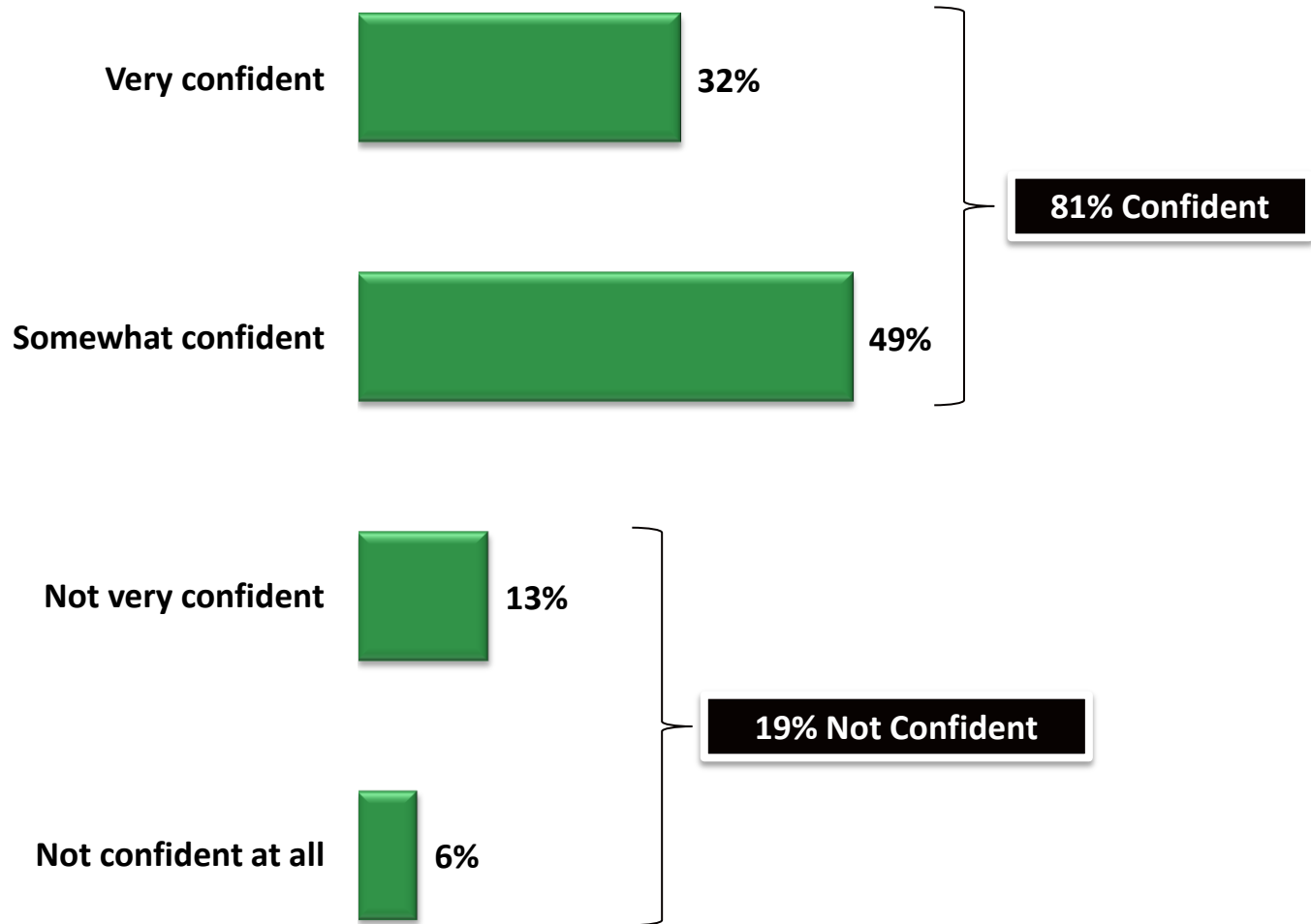


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**Confidence in Not
Serving Those Who
Shouldn't Be Served**

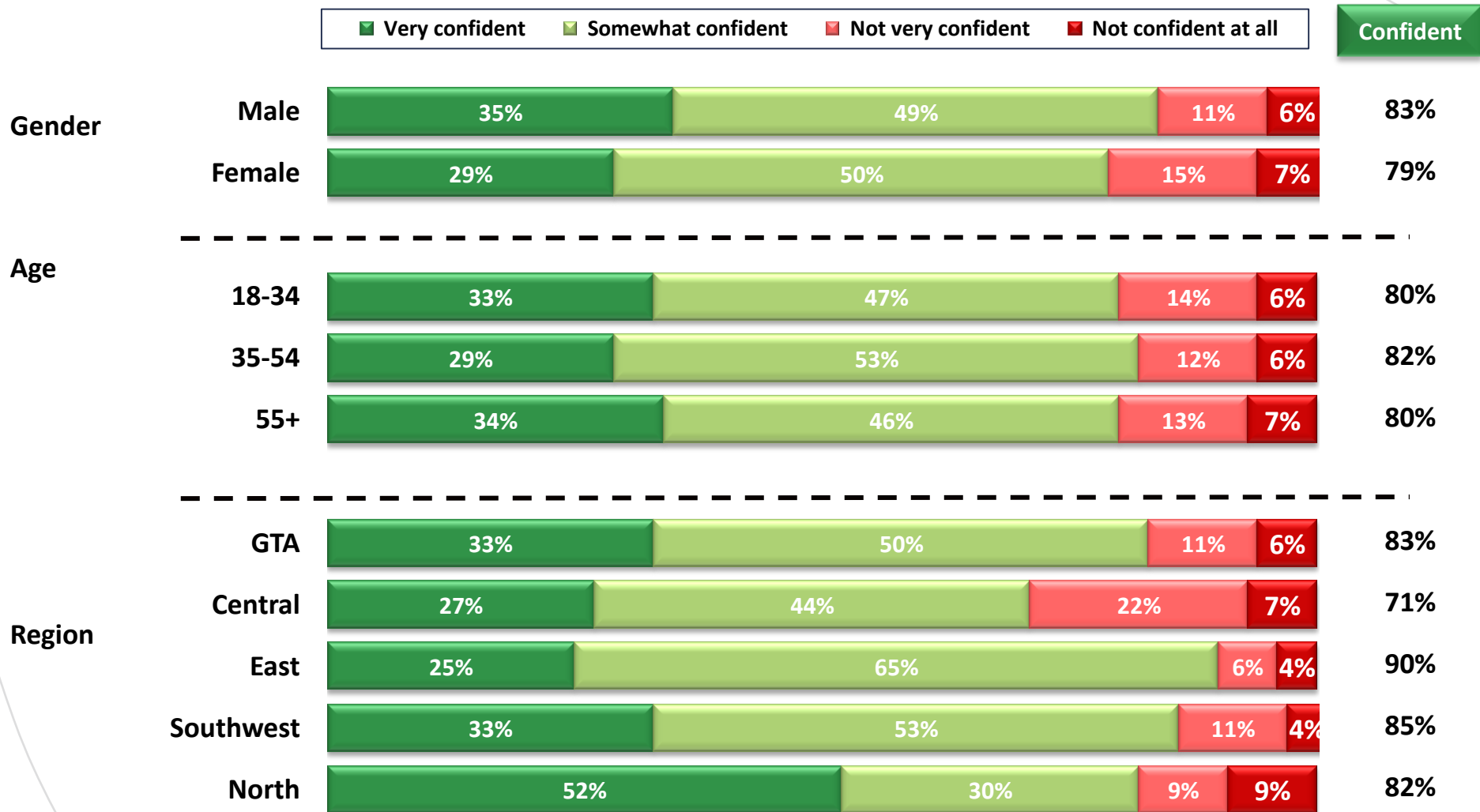
Confidence in Current System's Ability to Ensure No Minor/Intoxicated Individuals Served



How confident are you in the current liquor retailing system's ability to ensure that beer, wine and hard liquor isn't sold to minors or intoxicated individuals?

Base: All respondents (n=801)

Confidence in Current System's Ability to Ensure No Minor/Intoxicated Individuals Served - Demographics



Small Base: (*)

How confident are you in the current liquor retailing system's ability to ensure that beer, wine and hard liquor isn't sold to minors or intoxicated individuals?

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Issues Related to Convenience Stores Selling Beer/Liquor

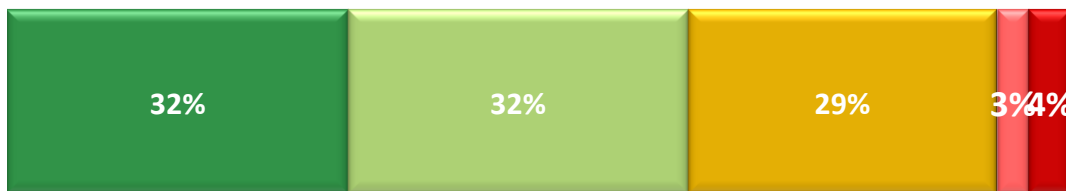
Increases in Issues Related to Alcohol Purchasing

■ Increase a lot
■ Increase a little
■ Stay the same
■ Decrease a little
■ Decrease a lot

Increase

Decrease

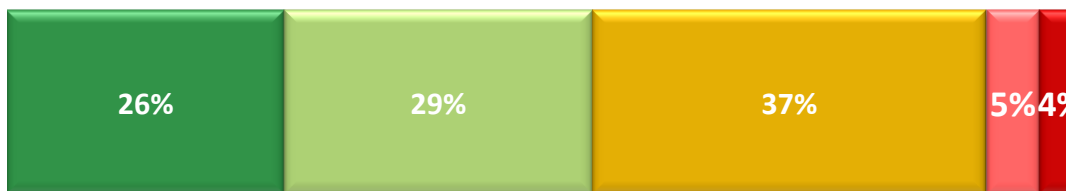
Sales to minors



64%

7%

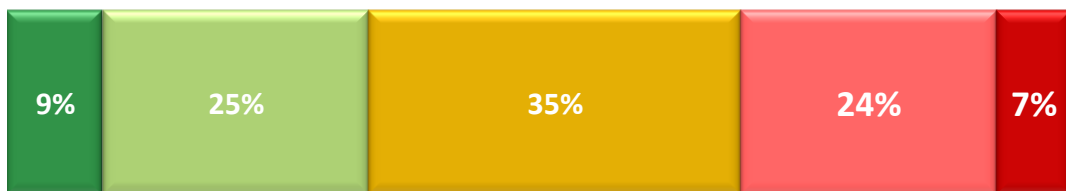
Drinking and driving



55%

8%

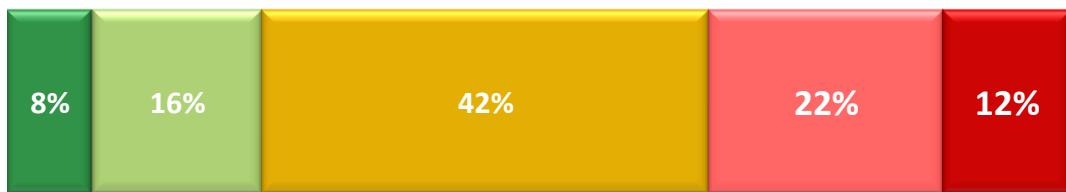
Beer, wine and Liquor prices



34%

30%

The selection of brands from which you can choose



24%

34%

If convenience stores were allowed to sell beer, wine and hard liquor do you think each of the following would increase a lot, increase a little, stay the same, decrease a little or decrease a lot?

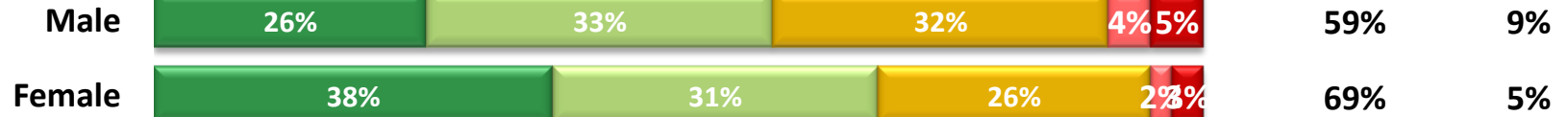
Base: All respondents (n=801)

Sales to Minors - Demographics

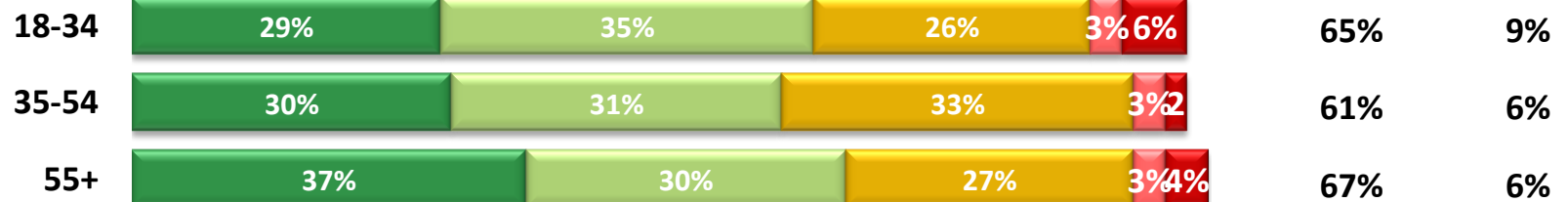
■ Increase a lot
 ■ Increase a little
 ■ Stay the same
 ■ Decrease a little
 ■ Decrease a lot

Increase
Decrease

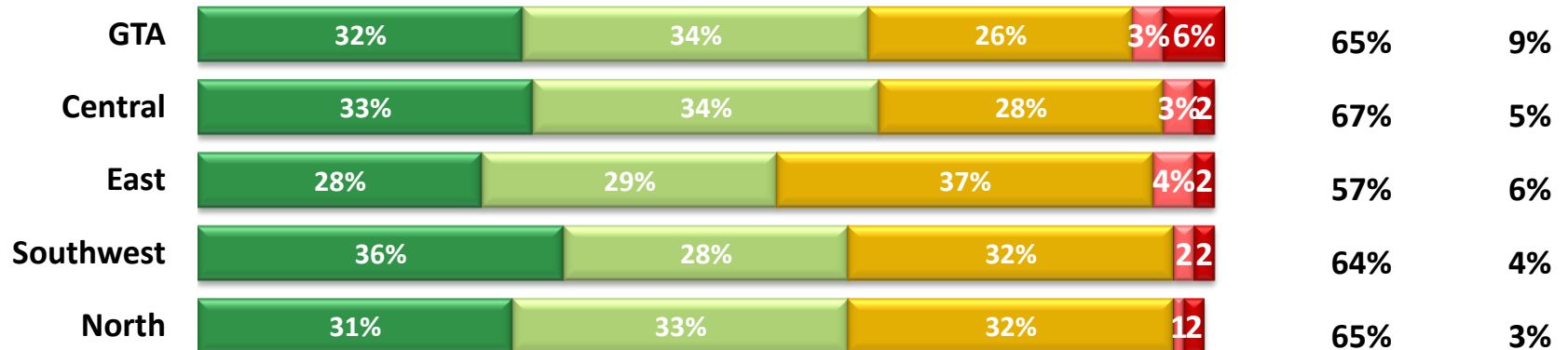
Gender



Age



Region

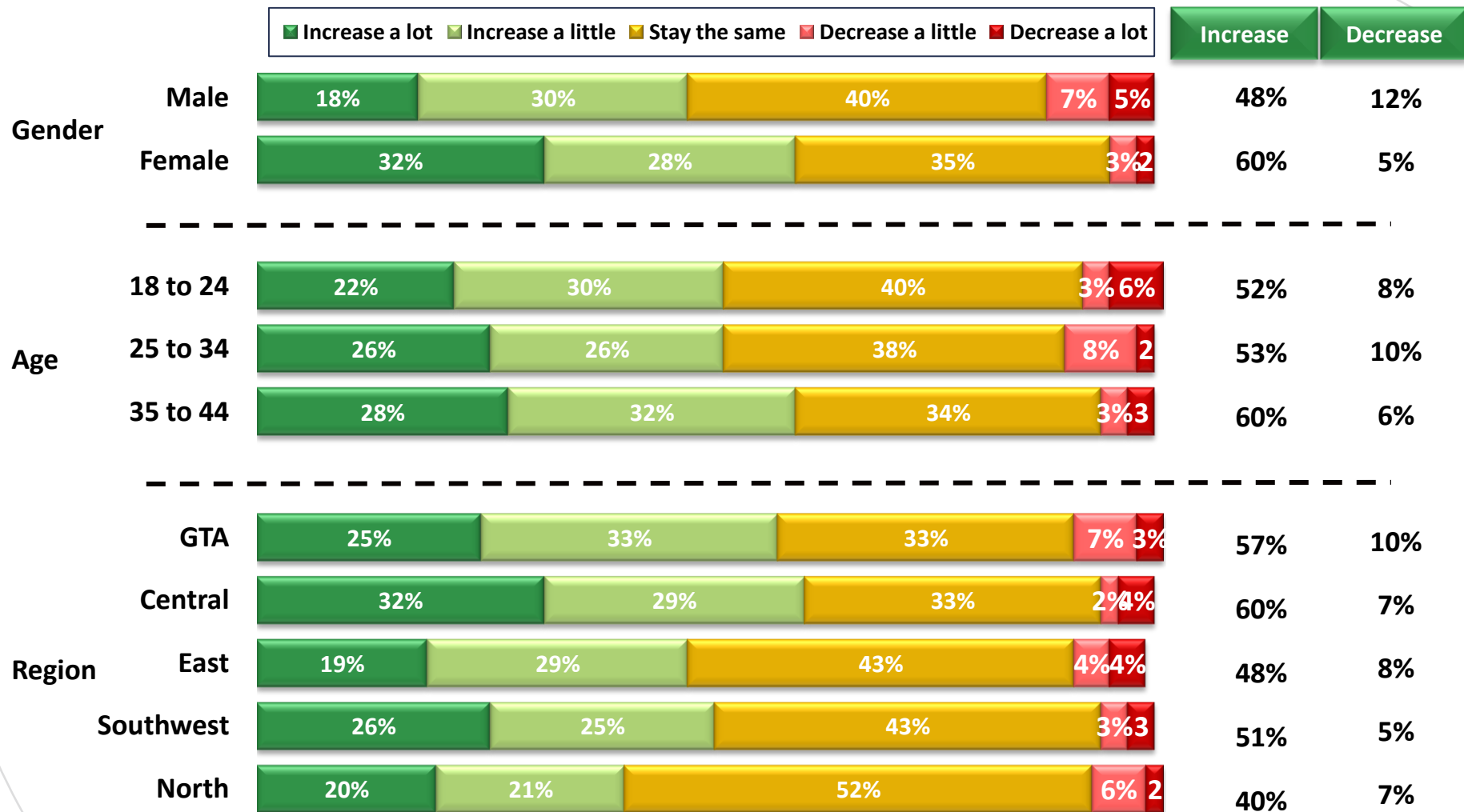


Small Base: (*)

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Drinking and Driving - Demographics

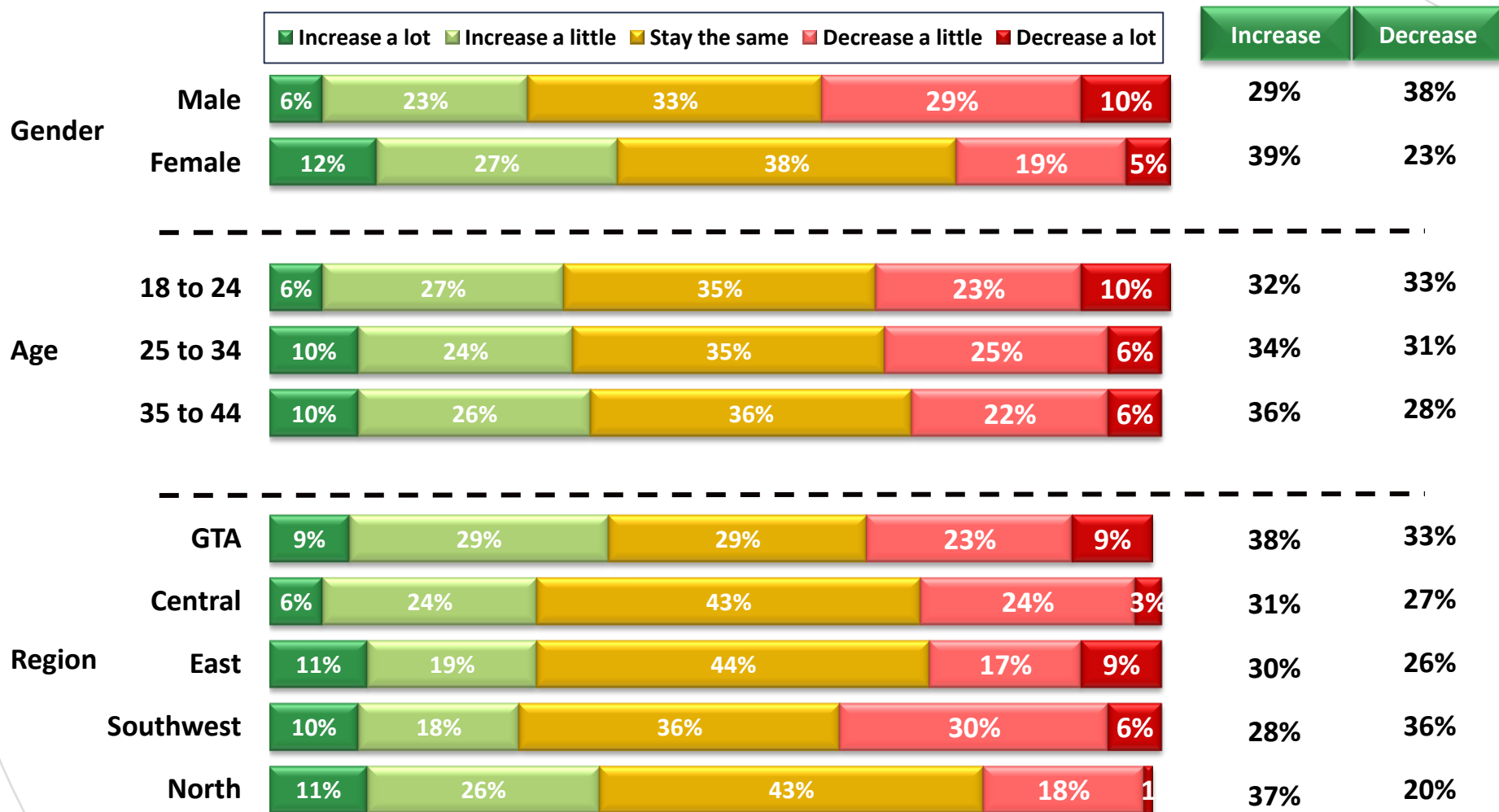


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Beer, Wine and Liquor Prices - Demographics

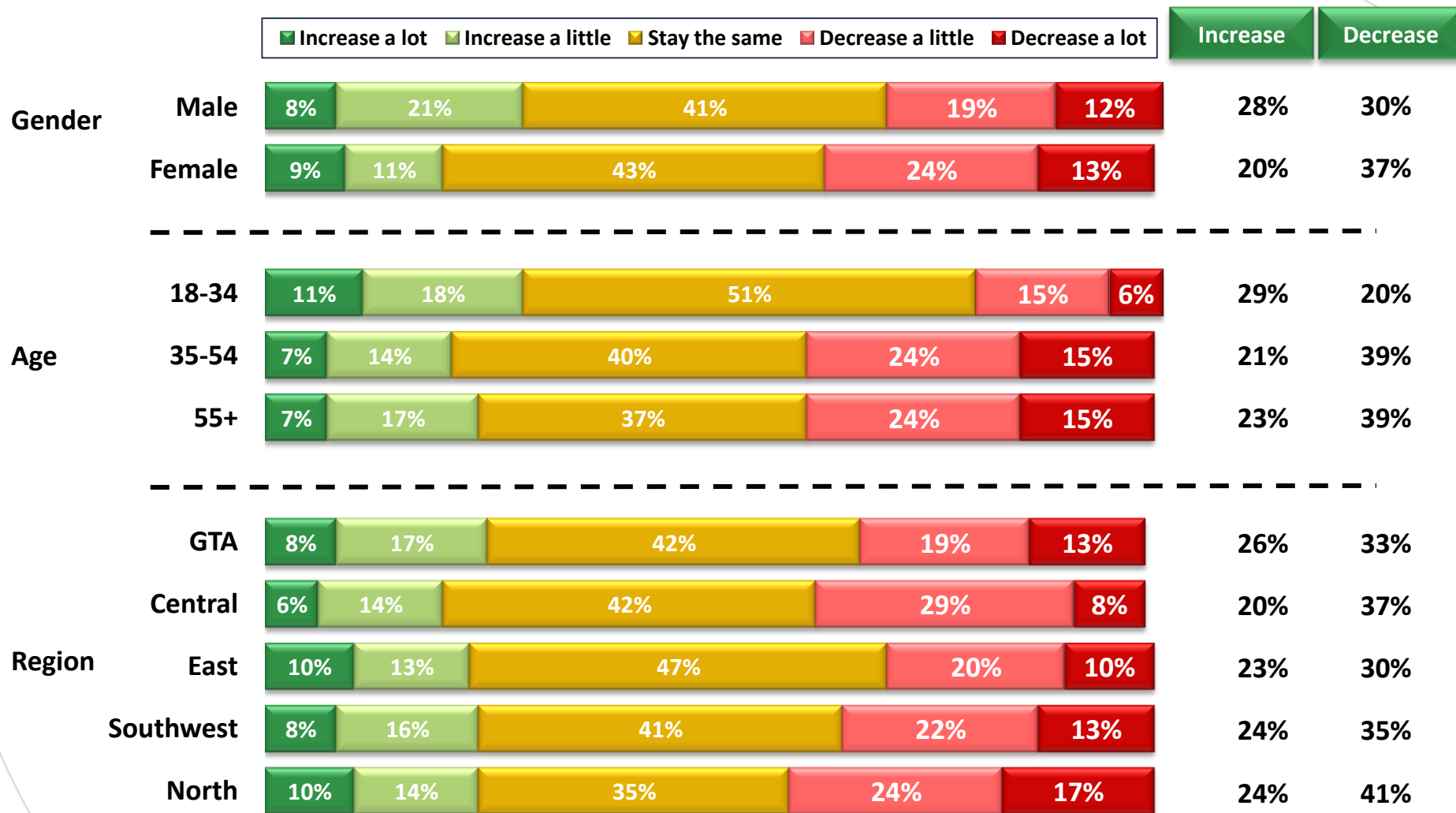


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Small Base: (*)

The Selection of Brands to Choose From - Demographics



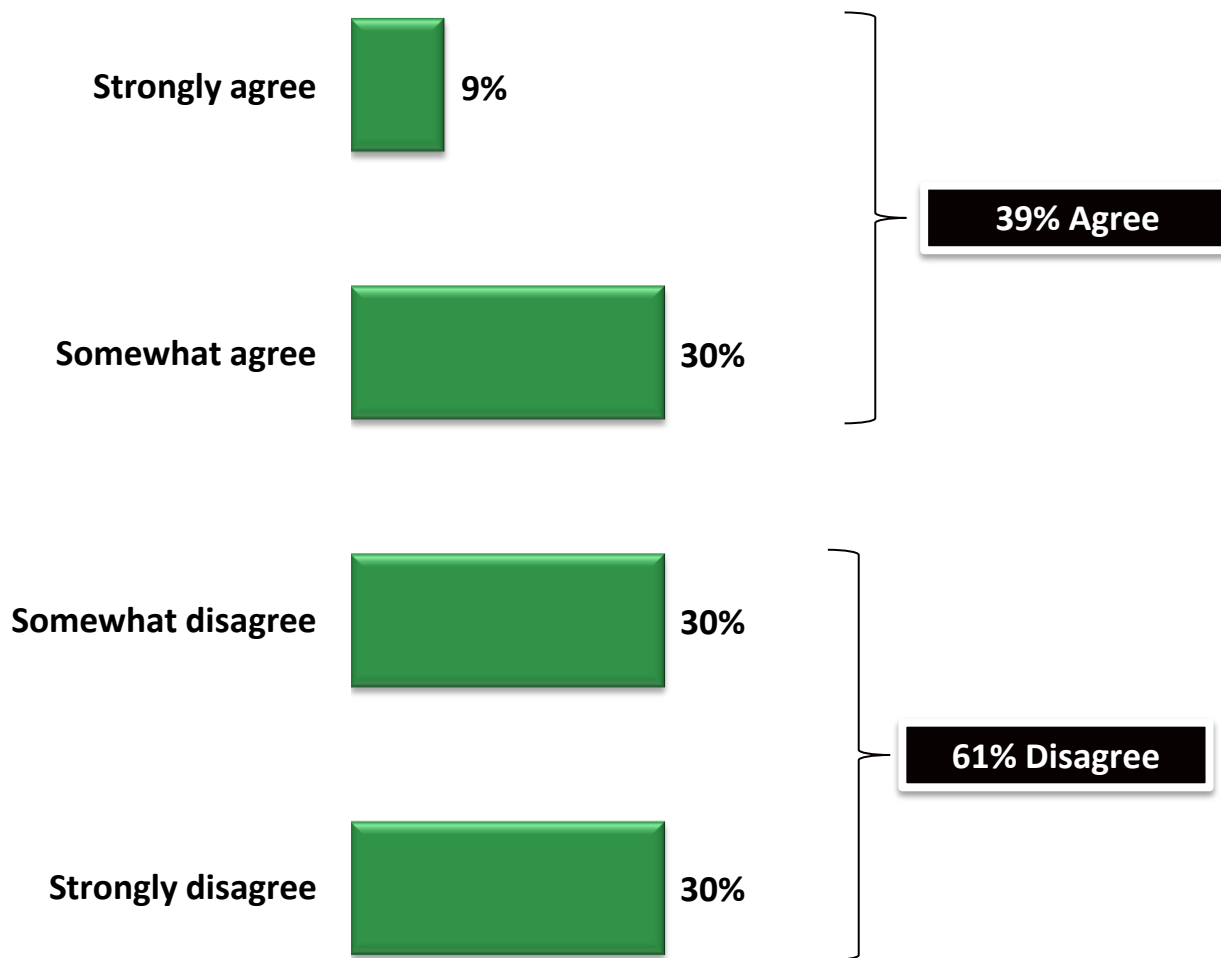
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Sufficient Staff

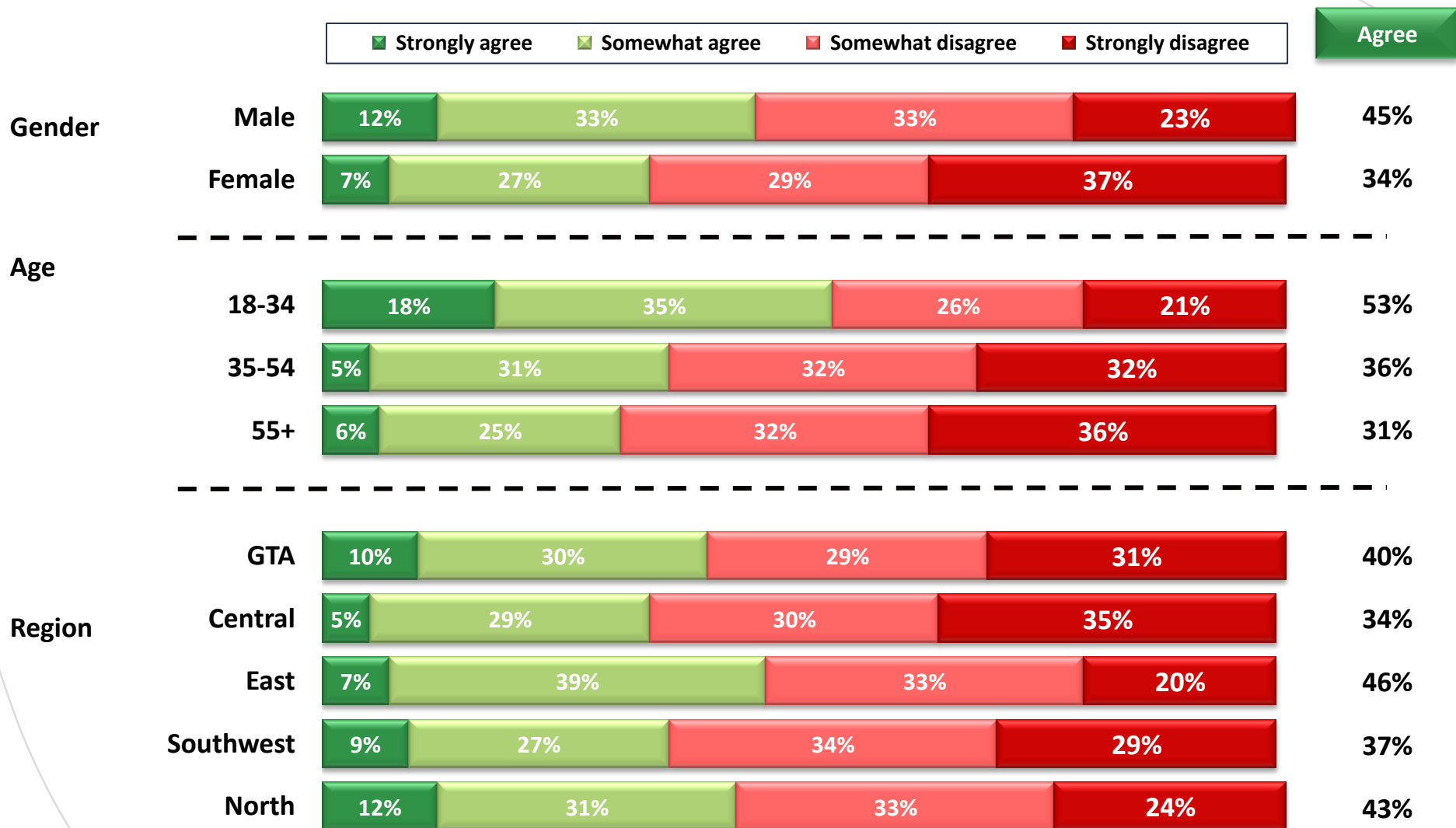
Agree or Disagree: Convenience Store Operators Have Sufficient Staff and Security to Prevent Theft of Alcohol



Do you agree or disagree that convenience store operators have sufficient staff on duty and security measures in place to prevent theft or shop lifting of beer, wine and hard liquor from their premises?

Base: All respondents (n=801)

Sufficient Staff - Demographics



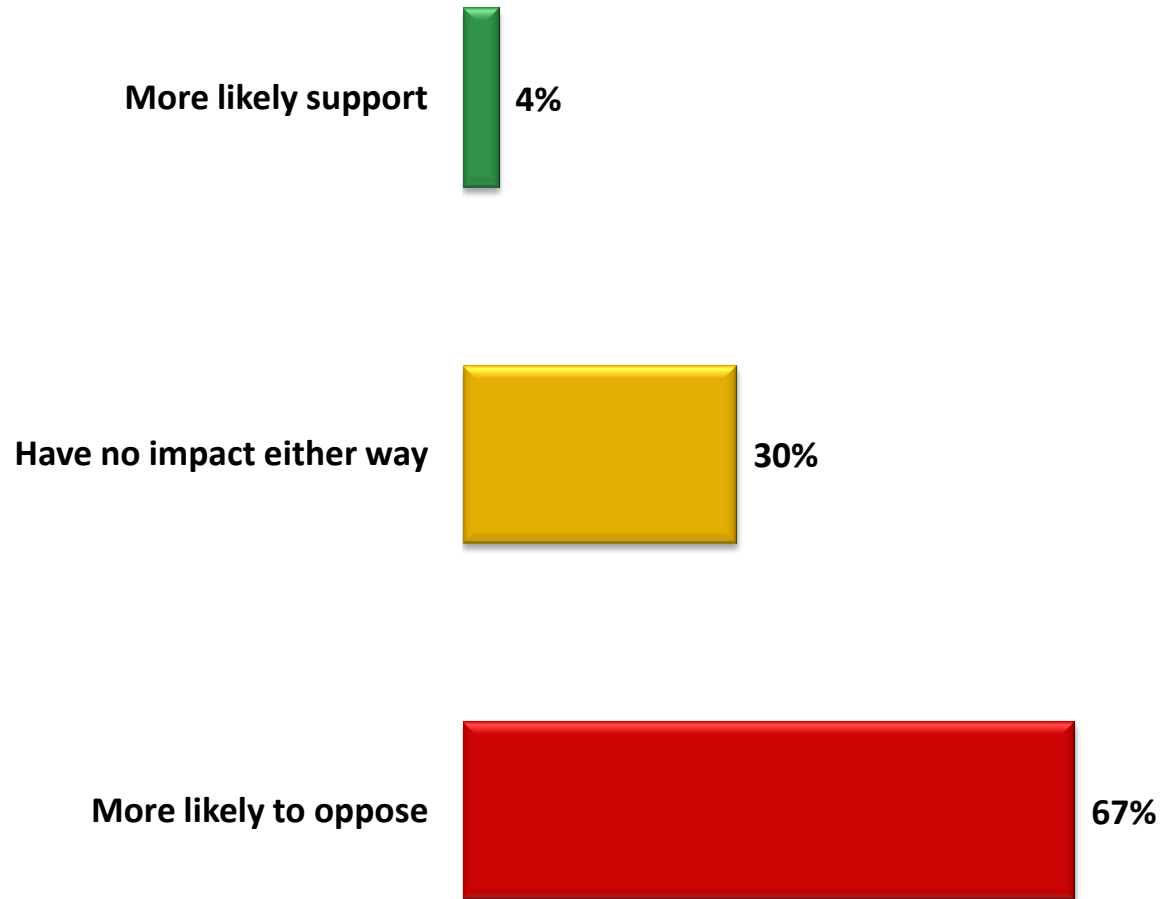
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Small Base: (*)

Higher Convenience Store Prices and Impact on Support of Alternative System in Ontario

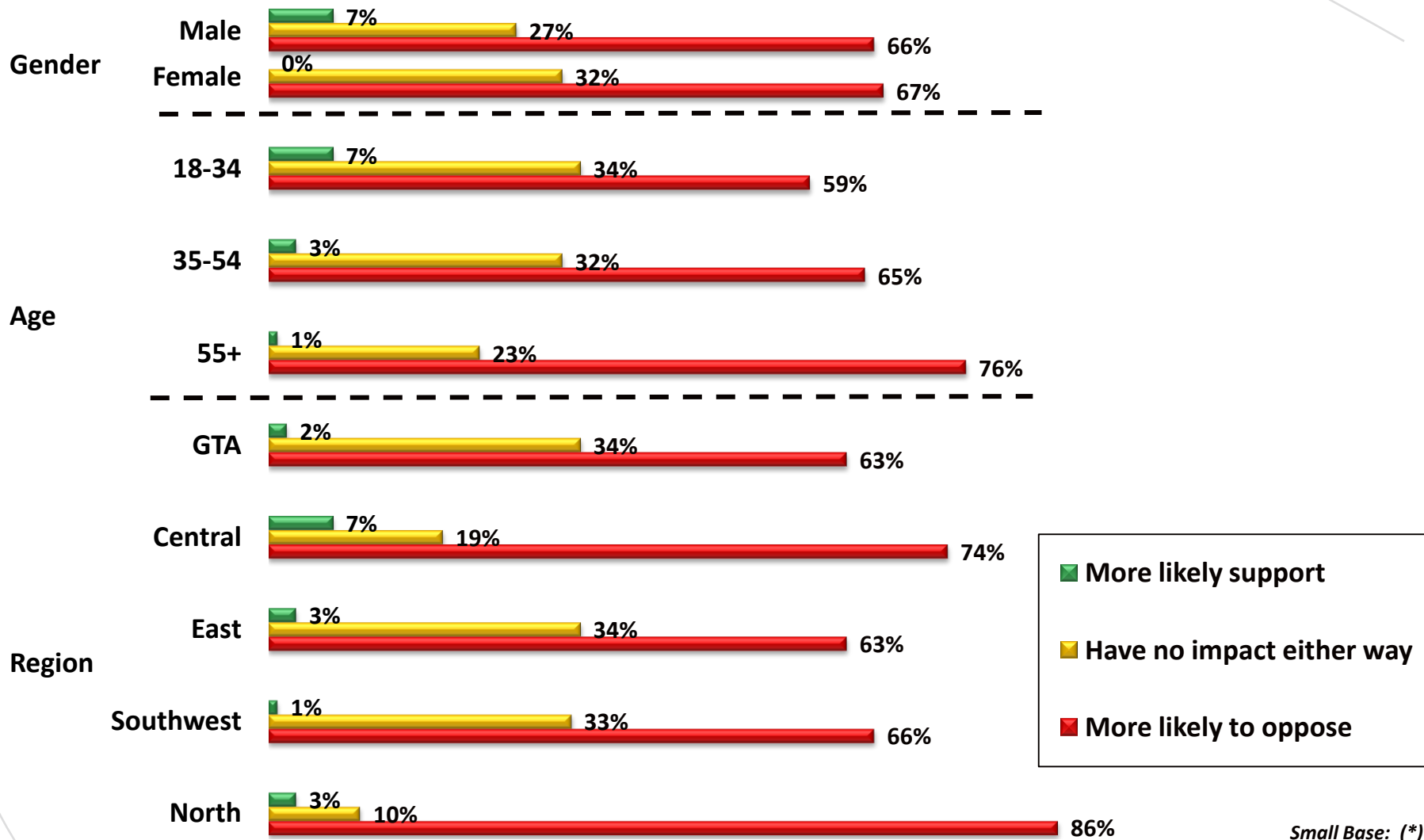
Higher Convenience Store Prices as a Factor of Support



If the sale of beer, wine and hard liquor in convenience stores meant the prices you had to pay would increase 15% to 20% compared to current prices would you be more likely to support or more likely to oppose the sale of beer, wine and hard liquor in convenience stores, or would having to pay higher prices have no impact on you either way?

Base: All respondents (n=801)

Higher Convenience Store Prices as a Factor of Support - Demographics



Small Base: ()*

If the sale of beer, wine and hard liquor in convenience stores meant the prices you had to pay would increase 15% to 20% compared to current prices would you be more likely to support or more likely to oppose the sale of beer, wine and hard liquor in convenience stores, or would having to pay higher prices have no impact on you either way?

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Gender

Male	48%
Female	52%

Age

18-34	28%
35-54	40%
55+	32%

Education

<HS	10%
HS	39%
Post Sec	33%
Univ Grad	18%

Household Composition

Kids	29%
No Kids	71%

Number of People at the Address

1	21%
2	31%
3	20%
4	18%
5	8%
6	2%
7	1%

Region

GTA	44%
Central ON	18%
East ON	12%
Southwest ON	14%
North ON	7%

Income

<40K	26%
40K - <60K	14%
60K - <100K	23%
100K+	17%



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