



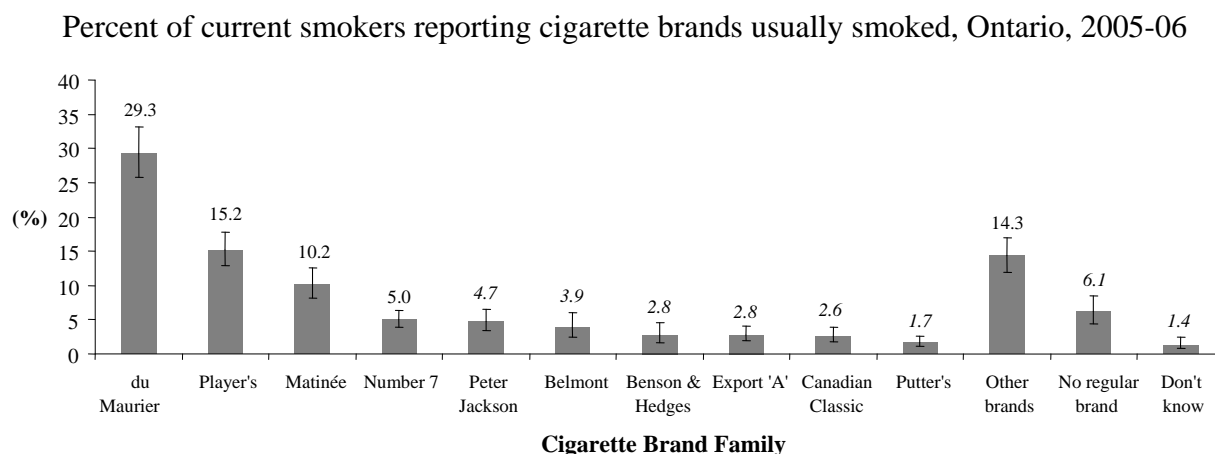
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## Cigarette Brand Family Preferences in Ontario

A broad variety of cigarette brands are available to Ontario smokers. Many of these are grouped into brand families offering product variations in size, reported nicotine and tar levels, filters or menthol flavouring, but sharing a distinctive look or image to promote overall brand visibility. The Ontario Tobacco Survey (OTS)<sup>1</sup> asked current smokers aged 18 or older in Ontario to report what brand of cigarettes they usually smoked. This update presents data on cigarette brand family preferences based on 1,368 current smokers from the first two waves of the cross-sectional component of the OTS conducted in 2005 and 2006 (overall response rate 64%). Sales data are used to examine brand family preferences across region and over time.

### Cigarette Brand Families Usually Smoked

The most common brand family smoked among current smokers in Ontario was du Maurier, followed by Player's, Matinée, Number 7, and Peter Jackson. This is consistent with 2005 sales data.<sup>2</sup>



Italics indicate estimates have moderate sampling variability, interpret with caution. Vertical lines represent 95% confidence intervals.

Source: Ontario Tobacco Survey, waves 1 & 2

### Brand Preference by Manufacturer

The regular brands reported by 84% of current smokers were made by the three leading manufacturers: Imperial Tobacco Canada Limited (61%), Rothmans, Benson & Hedges Inc. (19%), and JTI-Macdonald Corporation (5%) (percentages do not add to 84% due to rounding). Just under 6% were produced by small manufacturers or importers including Grand River

Enterprises and Tabac ADL Tobacco, Bastos du Canada, Lanwest Technologies, Dynasty Tobacco, Kretek International and Canadian Tobacco Company Limited. The remaining 10% of smokers reported no regular brand, generic brands, or said they did not know the brand they usually smoked.

### **Brand Preference by Region**

Based on 2006 sales data,<sup>2</sup> Ontarians were more likely to purchase du Maurier cigarettes than smokers in the other nine provinces (25% vs. 10-21%). Ontarians were less likely to purchase Export 'A' cigarettes than smokers in other provinces, except for Prince Edward Island (3% vs 7-14%). Canadian Classic was more popular in the West and Atlantic provinces (11-26%) than in Ontario (7%).

### **Brand Preference over Time**

In Ontario, Number 7 and Peter Jackson replaced Export 'A' and Rothmans as the fourth and fifth most popular brand families in 2005-06 compared to 1995.<sup>1,2</sup> Among the top three brand families, du Maurier and Player's lost market share, whereas Matinée gained it from 1995 to 2005-06.

### **Discussion**

Du Maurier, Player's and Matinée were the three most popular brand families of cigarette smoked in Ontario in 1995 and in 2005-06. Brand preferences in 2005-06 varied by region. Further analysis could determine brand preferences based on age or gender. Analyses of future waves of the longitudinal OTS sample could monitor brand loyalty and the extent of brand switching.

### **Notes**

<sup>1</sup> The Ontario Tobacco Survey is a regionally-stratified, random-digit-dial telephone survey of adults aged 18 or older. It has been conducted every six months since July 2005. More details about the survey are available at [http://www.otru.org/pdf/updates/update\\_mar2006.pdf](http://www.otru.org/pdf/updates/update_mar2006.pdf).

<sup>2</sup> Wholesale sales data were obtained from Health Canada