

Results of a national survey on the perception of
plain packaging on tobacco products five years after
its implementation in Australia

November 2017

Background

In April 2011 – the Australian government carried out a 60-day consultation on plain packaging. Plain packaging was the Australian government’s new proposed initiative to further reduce smoking. The policy’s objectives were set out in the Tobacco Plain Packaging Act 2011:

- a. To encourage people to give up smoking
- b. To discourage people from taking up smoking
- c. To prevent people who have given up smoking from taking it up again

The consultation received 99 submissions supporting the bill and 158 against it. At the time, the government did not carry out research into issues such as the potential increase in illegal cigarettes that plain packaging might cause.

In September 2011 – the government published its summary of the consultation and decided to proceed with plain packaging. On 1st December 2012 plain packaging was introduced in Australia. Australia was the first country in the world to introduce the policy.

The Australian government began its national drug survey in 1990. An analysis of the study from 1990 to 2013 shows a significant decline and trend downwards in the prevalence of smoking over time.

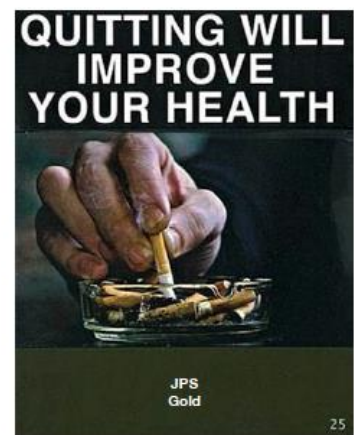
In the five years since plain packaging was implemented, its success or failure as a policy in reducing smoking has been hotly contested. Anti tobacco activists, the Australian government and some media have argued that plain packaging has been a success. Tobacco companies, academics, think tanks, other media and freedom of choice advocates have argued that plain packaging has not been effective at reducing smoking. They also argue that it has led to a number of negative consequences, including the danger of a rise in illegal cigarettes and calls for the plain packaging policy to be extended to other products in the future.

The claimed success of plain packaging in Australia has been used as a rationale to persuade governments in other countries to introduce or consider introducing plain packaging. Plain packaging was introduced in France and the United Kingdom in 2017.

In June 2017, the Australian government released its latest and most extensive study into the incidence of smoking in Australia. According to the figures released by the Australian Institute of Health and Welfare, “...while smoking rates have been on a long-term downward trend, for the first time in over two decades, the daily smoking rate did not significantly decline over the most recent 3 year period (2013 to 2016)”.

In Australia, a number of regulations are aimed at restricting the advertising, smoking, display and packaging of tobacco products: advertising is banned for tobacco brands, smoking is banned in pubs and clubs, the display of tobacco is banned in shops and health warnings cover 75% of the front and 90% of the back of cigarette packs. Tobacco is also heavily taxed.

Since the implementation of plain packaging for tobacco products in December 2012, each pack must be produced in the same drab brown colour. Tobacco companies are no longer allowed to display any brand logos. All brands must be written in text only in the same small font. For clarity of understanding and transparency, when plain packaging was explained in this research, people were shown the below comparative images for three tobacco brands.



Why JTI paid for this independent survey in Australia and why leading independent research company CanvasU carried it out

JTI is a tobacco company and is against plain packaging. While the company does not have any offices in Australia, it is concerned by the claimed success of plain packaging in the country, which has been used as a key rationale to justify the consideration of the measure in other countries. JTI's view is that the policy does not reduce smoking, deprives companies of the use of their brands and trademarks and comes with significant negative consequences.

Five years after the implementation of plain packaging in Australia, and in light of the government's own research in June 2017 showing that the long-term decline in smoking has stalled, JTI wished to independently research the Australian public's views on some key considerations linked to:

- Plain packaging's perceived effectiveness as a policy to reduce smoking in Australia.
- How fairly they believed policies are evaluated by government in Australia.
- Whether the public believe the consequences linked to illegal cigarettes should also have been researched before plain packaging was introduced.
- The levels of concern about government overreach in policy into adult lifestyle choices.
- How likely it is that people believe that government will extend the overreach of policies like plain packaging to other products.

JTI contacted CanvasU as an independent research company to carry out a national survey. CanvasU approved and verified the survey before it went into the field and 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 CanvasU surveyed.

CanvasU interviewed 2,097 Australian adults (18+) online between 2 and 11 November 2017. The survey was regionally and demographically representative of the Australian population.

Where percentage results do not sum to 100, this may be a result of rounding or the exclusion of 'don't know' categories.

The results for all adults are statistically valid at a level +/- 2% of probability. CanvasU can be contacted directly to answer any questions on the methodology or the way in which the research was conducted.

Why CanvasU was selected to carry out the research

When a tobacco company carries out research or presents research arguments, they are frequently treated with scepticism. JTI contacted CanvasU as a highly regarded independent research company to carry out this survey. The Company wanted to be able to assess and show public opinion in Australia and how it compares to some claims on plain packaging's effectiveness. Through this research, JTI aims to encourage a much more open public debate on whether plain packaging worked in Australia.

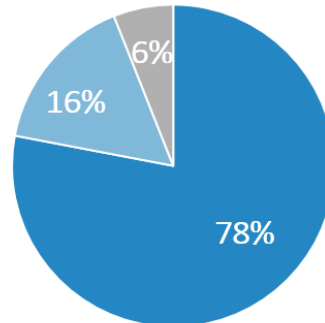
CanvasU is a 100% Australian owned and independent research agency. Neil Evans, Executive Director, has worked with clients across Government, Education institutions, Blue Chip companies and as a preferred supplier for leading Market Research companies within Australia and overseas. CanvasU has extensive experience conducting both online and telephone research for a variety of domestic and international clients. CanvasU is a member of the Australian Market & Social Research Society (AMSRS) and abides by the Society's Code of Professional Behaviour and regulations. If you have any questions about CanvasU or the methodology behind this research please contact: Neil Evans – Executive Director, neil@canvasu.com.au, **+61 (0)2 8097 0746**

Executive summary

- Five years after its implementation, most Australians (78%) are aware that plain packaging for tobacco has been introduced.
- Five years after its implementation, the majority of Australians who expressed a view (59%) say that plain packaging was not effective at reducing smoking vs. 41% of Australians who think it was effective.
- The majority of Australians (59%) agree that before the government introduced plain packaging, they should have carried out independent research into the potential impact of plain packaging on the illegal cigarette market.
- 80% of Australians believe the Australian government wouldn't change or would be reluctant to change a preferred policy even if the evidence was weighted against it.
- Almost 9 out of 10 Australian adults under 30 believe the Australian government wouldn't change or would be reluctant to change a preferred policy even if the evidence was weighted against it.
- Over 4 in 10 Australians (43%) believe the national government interferes more than it should in the lifestyle choices of Australian adults.
- 50% of Australians believe plain packaging has already been introduced or will be introduced as a government policy on wine, beer and spirits in the future, 57% on products with high sugar content and 47% on fast food.
- Two-thirds of Australians believe government policy has been or will be extended in the future to increase the legal age for buying tobacco to 21. Over half believe the legal age to purchase alcohol has been or will be increased to 21.
- Most Australians believe government policy has been or will be extended in the future to restrict buying only to specialist alcohol and tobacco stores with restricted times of opening.
- 79% of Australians think introducing the banning of smoking on entire specified streets either exists or would be a government policy in the future.

Five years after its implementation, 78% of Australians are aware that plain packaging for tobacco has been introduced.

Q. Below is a list of government policies. To the best of your knowledge, which of these: has already been introduced, is due to be introduced soon, will likely be introduced in the future, has not and will not be introduced in Australia... **plain/standardised packaging for tobacco.**



- Has already been introduced
- Is due to be introduced soon or is likely to be introduced in the future
- Has not and will not be introduced in Australia

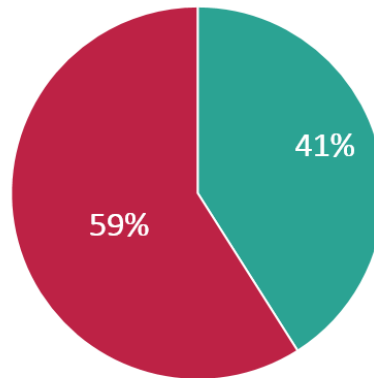


1. November 2017 - Base: All (2,097)
2. Q6a

- The lowest level of awareness is among the 18-29 age group at 66%.
- The highest level of awareness is among the 50+ age group at 85%.
- Sydney (72%) and Brisbane (73%) are the regions with the lowest awareness.

The majority of Australians (59%) that expressed a view said that plain packaging was not effective at reducing smoking.

Q. Based on what you have seen, heard and experienced in Australia since the introduction of plain packaging on tobacco products – do you think it was effective in reducing smoking?



■ Effective at reducing smoking ■ Not effective at reducing smoking

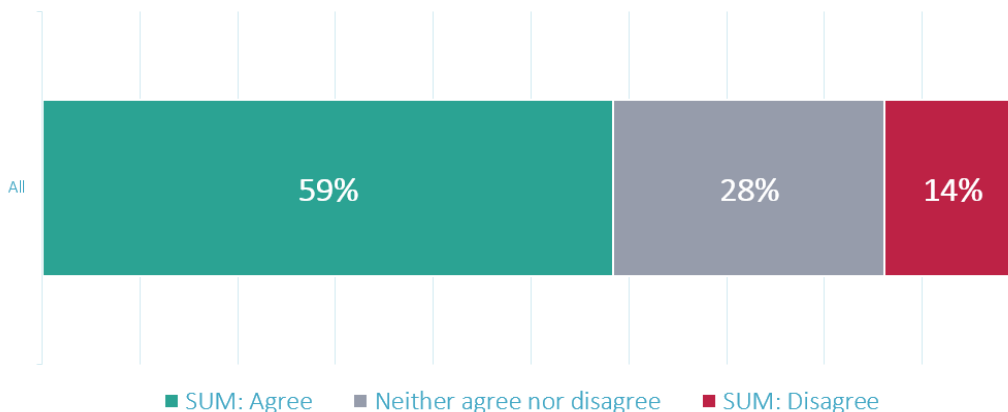


1. November 2017 - Base: All (2,097, of which, 81% expressed a view)
2. Q10

- Of those who expressed a view, women (65%) were more likely to say that plain packaging was not effective at reducing smoking.
- Among respondents who expressed a view, all age groups said that plain packaging is not effective at reducing smoking; the lowest agreement among age groups that it is not effective is the over 50s (56%).

The majority of Australians (59%) agree that before the government introduced plain packaging, they should have carried out independent research into the potential impact on the illegal cigarette market.

Q. Before the introduction of plain packaging on tobacco products, to what extent do you agree or disagree that the national government should have carried out thorough independent research into the potential impact of plain packaging on the illegal cigarette market?

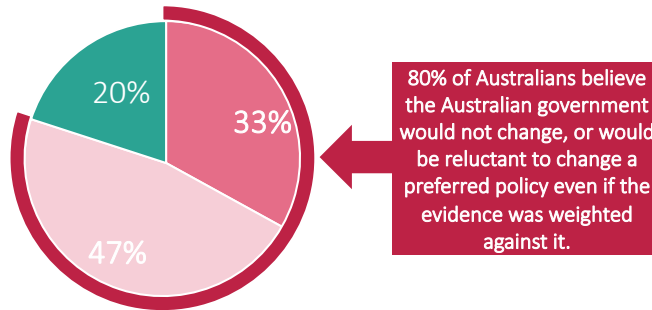


1. November 2017 - Base: All (2,097)
2. Q9

- 18-29s (67%) are the age group most likely to agree that before the government introduced plain packaging, they should have carried out independent research into the potential impact on the illegal cigarette market.
- Australians aged 50+ (53%) are the age group least likely to agree that before the government introduced plain packaging, they should have carried out independent research into the potential impact on the illegal cigarette market.
- Sydney (64%) is the region most likely to agree that before the government introduced plain packaging, they should have carried out independent research into the potential impact on the illegal cigarette market.

80% of Australians believe the Australian government would not change, or would be reluctant to change, a preferred policy even if the evidence was weighted against it.

Q. If the Australian government was looking to evaluate one of the policy areas mentioned in the previous question, which of these scenarios do you think is most likely in how they would conduct the evaluation process...



- They would only select people in favour of their preferred policy as advisors and **only present evidence that supported their preferred policy**
- They would select a balance of people both in favour and against their preferred policy as advisors - **but even if the evaluation of evidence was weighted against their preferred policy they would be reluctant to change it**
- They would select a balance of people both in favour and against their preferred policy and if the evaluation of the evidence was against the preferred policy they would remove or change the policy

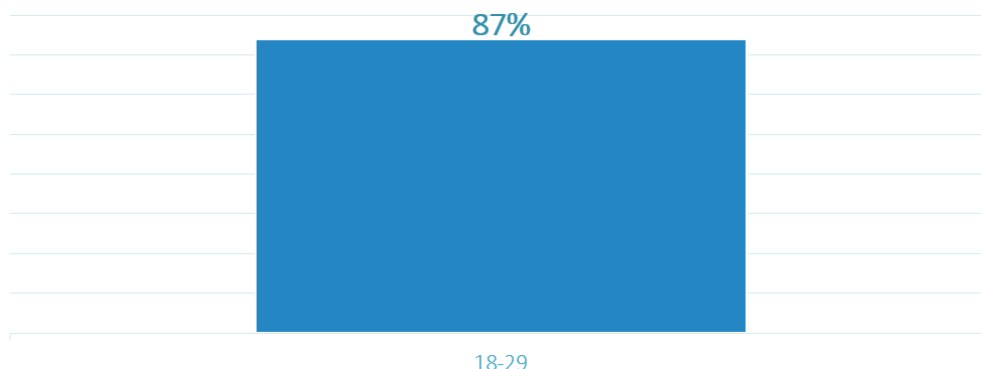


1. November 2017 - Base: All (2,097)
2. Q7

- Brisbane is the region where more (86%) believe that the Australian government would not change, or would be reluctant to change, a preferred policy if the evidence was weighted against it.

Almost 9 out of 10 Australian adults under 30 believe the Australian government would not change, or would be reluctant to change, a preferred policy even if the evidence was weighted against it.

Q. If the Australian government was looking to evaluate one of the policy areas mentioned in the previous question, which of these scenarios do you think is most likely in how they would conduct the evaluation process... [showing % agreeing the government would either only select people in favour of their preferred policy as advisors and only present evidence that supported their preferred policy OR select a balance of people in favour and against their preferred policy as advisors but be reluctant to change their preferred policy, even if the evidence was weighted against it]

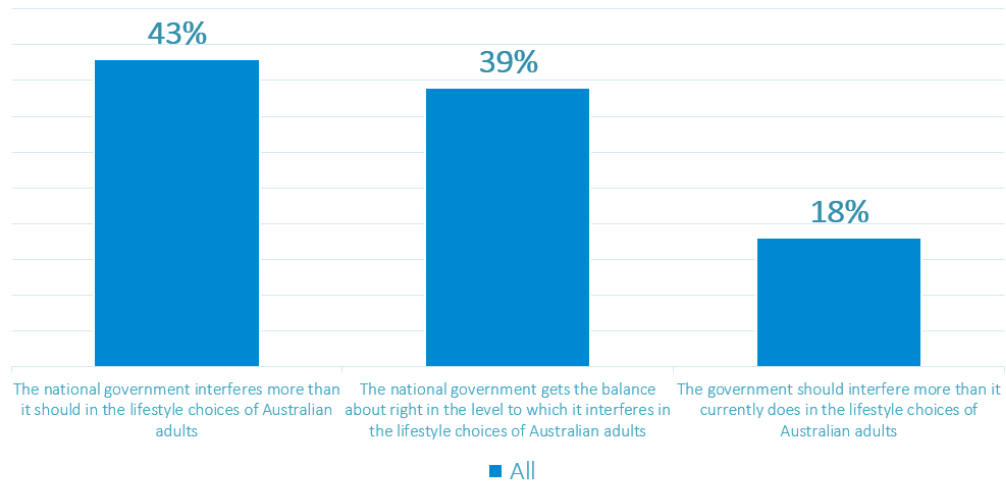


1. November 2017 - Base: 18-29 (439)
2. Q7



Over 4 in 10 Australians (43%) believe the national government interferes more than it should in the lifestyle choices of Australian adults.

Q. Which of the following statements is closest to your view, even if none of them is exactly right?



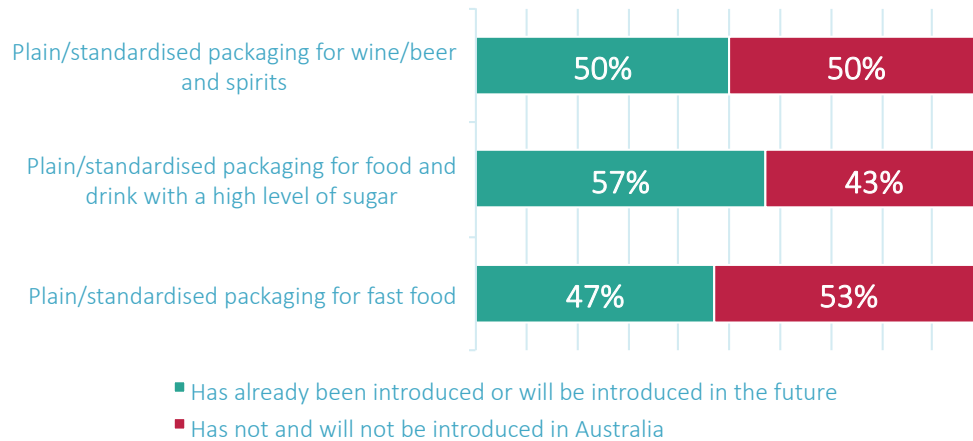
1. November 2017 - Base: All (2,097)
2. Q5

- Men (47%) are more likely than Australian adults overall to think the national government interferes more than it should in the lifestyle choices of Australian adults.
- At 53%, Greater Victoria (outside Melbourne) is the region most likely to think the national government interferes more than it should in the lifestyle choices of Australian adults.
- Those who think plain packaging has not been effective in reducing smoking are more likely (57%) to also think the national government interferes more than it should in the lifestyle choices of Australian adults.

50% of Australians believe plain packaging has been, or will be, introduced as a government policy on alcohol in the future



Q. Below is a list of government policies. To the best of your knowledge, which of these: has already been introduced, is due to be introduced soon, will likely be introduced in the future, has not and will not be introduced in Australia...



1. November 2017 - Base: All (2,097)
2. Q6b, Q6c, Q6d

- The vast majority of the 18-29 age group (64%) believe plain packaging has been, or will be, introduced on wine, beer and spirits in the future.
- The majority of Australians (57%) believe plain packaging has been, or will be, introduced as a government policy on food and drink with high levels of sugar in the future.
- 47% of Australians believe plain packaging has been, or will be, introduced as a government policy on fast food in the future.

Two-thirds of Australians believe government policy has been, or will be, extended in the future to increase the legal age for buying tobacco to 21, over half say the same for alcohol.

Q. Below is a list of government policies. To the best of your knowledge, which of these: has already been introduced, is due to be introduced soon, will likely be introduced in the future, has not and will not be introduced in Australia...

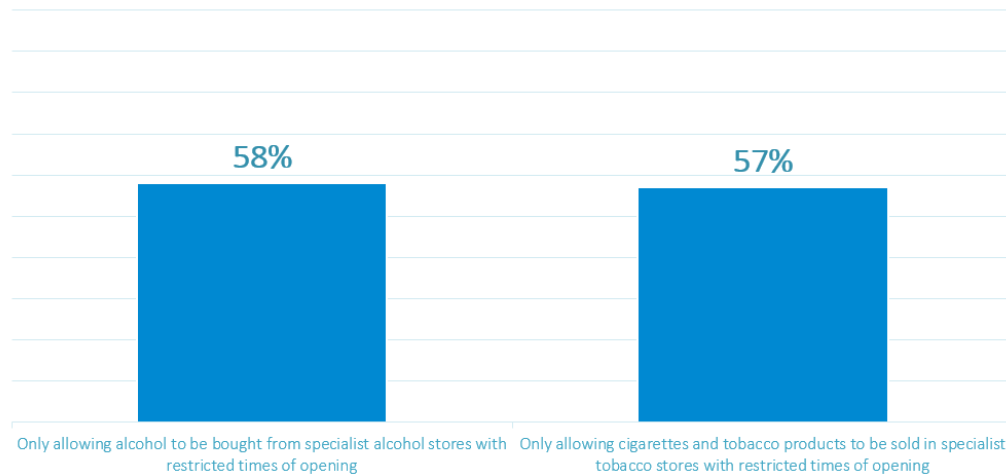


1. November 2017 - Base: All (2,097)
2. Q6e, Q6f

- The Perth region is more likely to believe the government has already increased, or will increase in the future, the legal age for buying tobacco (74%) and alcohol (66%) to 21.
- The 30-39 age group is more likely to believe the government has already increased, or will increase in the future, the legal age for buying tobacco (72%) and alcohol (66%) to 21.

Most Australians believe government policy has been extended or will be extended in the future to restrict the sale of alcohol and tobacco to specialist stores with restricted times of opening.

Q. Below is a list of government policies. To the best of your knowledge, which of these: has already been introduced, is due to be introduced soon, will likely be introduced in the future, has not and will not be introduced in Australia... [showing % agreeing restrictions have already been, or will be, introduced]



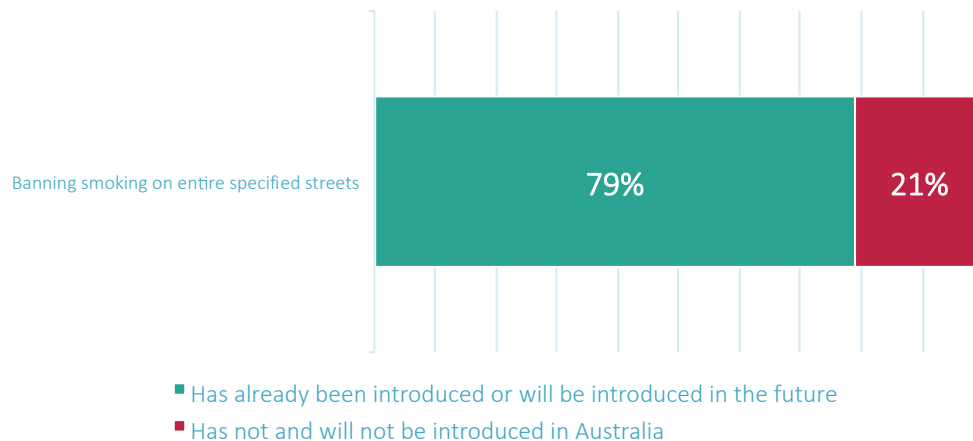
 CanvasU

1. November 2017 - Base: All (2,097)
2. Q6g, Q6h

- 18-29s (68%) and 30-39s (69%) are more likely than other age groups to believe the government has restricted, or will restrict in the future, the sale of alcohol to specialist stores with restricted times of opening.
- 18-29s (67%) and 30-39s (67%) are more likely than other age groups to believe the government has restricted, or will restrict in the future, the sale of tobacco and cigarettes to specialist stores with restricted times of opening.
- The Sydney region (67%) are more likely to believe the government has restricted, or will restrict in the future, the sale of alcohol to specialist stores with restricted times of opening.
- Respondents in the Sydney region (65%) are more likely than those in other regions to believe the government has restricted, or will restrict in the future, the sale of tobacco and cigarettes to specialist stores with restricted times of opening.

79% of Australians think the banning of smoking on entire specified streets either exists or will be a government policy in the future.

Q. Below is a list of government policies. To the best of your knowledge, which of these: has already been introduced, is due to be introduced soon, will likely be introduced in the future, has not and will not be introduced in Australia...



 CanvasU

1. November 2017 - Base: All (2,097)
2. Q6i

- 18-29s (85%) and 30-39s (84%) are more likely than other age groups to believe the government has banned, or will ban in the future, smoking on entire specified streets.