

NEWS RELEASE



MEDIA INQUIRIES:

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FOR IMMEDIATE RELEASE

One half approve of beer sales in grocery and convenience stores

Most think The Beer Store is Canadian-owned

TORONTO APRIL 7th, 2014 - In a random sampling of public opinion taken by the Forum Poll™ among 928 Ontarians 18 years of age and older, one half approve of the job The Beer Store does selling beer (52%), whereas just more than a quarter disapprove (28%). Disapproval is highest among the youngest (35%).

Two thirds buy beer at retail

Two thirds of the adults in Ontario buy beer at retail to drink at home (65%), and incidence is, once again, highest among the youngest (69%) and the least wealthy (less than \$20K - 72%). Beer is purchased, on average, about twice a month, or once every two weeks, but just less than a fifth (17%) purchase weekly or more often.

Half purchase beer at The Beer Store

Among beer purchasers, one half buy mostly at The Beer Store (51%), while 4-in-10 buy mostly at the LCBO. One tenth split their business equally between the two (8%).

The Beer Store, grocery stores and C-stores seen as appropriate for beer

While 3-in-10 select The Beer Store as the most appropriate place to sell beer (30%), just fewer think grocery stores (22%) or convenience stores (20%) are most appropriate. Fewer select the LCBO (10%) or brewery owned stores (6%), while a tenth think all of these channels are appropriate (11%).

Wide majority likely to buy beer in grocery/C-store

Seven-in-ten Ontario adults who purchase beer are likely to buy beer at a convenience store or grocery store (70%), while 3-in-10 are not. Fully one half say they are "very likely" to do so (54%).

Far fewer will buy at grocery/C-store with price premium

Just more than one quarter are likely to buy beer in grocery or convenience stores if there is 10% price premium over The Beer Store (28%), and just one eighth are "very likely" (16%), which indicates a high degree of price sensitivity in the beer category. Fully 7-in-10 are unlikely to buy in this environment if the premium applies (70%).

TORONTO

April 7th, 2014

HIGHLIGHTS:

- One half approve of the job The Beer Store does selling beer (52%).
- Two thirds of the adults in Ontario buy beer at retail to drink at home (65%).
- Among beer purchasers, one half buy mostly at The Beer Store (51%), while 4-in-10 buy mostly at the LCBO.
- While 3-in-10 select The Beer Store as the most appropriate place to sell beer (30%), just fewer think grocery stores (22%) or convenience stores (20%) are most appropriate.
- Seven-in-ten Ontario adults who purchase beer are likely to buy beer at a convenience store or grocery store (70%), while 3-in-10 are not.
- Just more than one quarter are likely to buy beer in grocery or convenience stores if there is 10% price premium over The Beer Store (28%), and just one eighth are "very likely" (16%).

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HIGHLIGHTS:

- While just less than half of Ontarians in total approve of beer sales at grocery and convenience stores (48%), just less than this disapprove (44%).
- Three-in-ten Ontarians in total rate The Beer Store as excellent for products and services (30%), while just one tenth rate it "poor" (9%).
- Almost two thirds of Ontario adults think The Beer Store is Canadian-owned (62%), whereas just one fifth correctly state it is foreign-owned (22%).
- "It's not surprising that many Ontario beer drinkers will appreciate the convenience of buying their brew at the corner store, but beer is a very price sensitive product; aficionados know the price of every bottle. As little as a 10% retail premium may keep them going to The Beer Store, as much as some don't like to," said Forum Research President, Dr. Lorne Bozinoff.

One half in total favour beer sales in grocery/C-stores

While just less than half of Ontarians in total approve of beer sales at grocery and convenience stores (48%), just less than this disapprove (44%). Few don't have an opinion (8%). Among beer purchasers, however, close to 6-in-10 approve of the alternate distribution channels (57%) and just more than a third disapprove (36%). Among non-purchasers, results are flipped (approve - 31%, disapprove - 59%).

3-in-10 rate The Beer Store as "Excellent"

Three-in-ten Ontarians in total rate The Beer Store as excellent for products and services (30%), while just one tenth rate it "poor" (9%). The Beer Store is given its highest ratings by Gen X (45 to 54 - 38%) and the least wealthy (less than \$20K - 40%).

Two thirds believe The Beer Store is Canadian-owned

Almost two thirds of Ontario adults think The Beer Store is Canadian-owned (62%), whereas just one fifth correctly state it is foreign-owned (22%). This knowledge is most common to those who disapprove of the job The Beer Store is doing (39%).

"It's not surprising that many Ontario beer drinkers will appreciate the convenience of buying their brew at the corner store, but beer is a very price sensitive product; aficionados know the price of every bottle. As little as a 10% retail premium may keep them going to The Beer Store, as much as some don't like to," said Forum Research President, Dr. Lorne Bozinoff.

Lorne Bozinoff, Ph.D. is the president and founder of Forum Research. He can be reached at lbozinoff@forumresearch.com or at (416) 960-9603.

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Methodology

The Forum Poll™ was conducted by Forum Research with the results based on an interactive voice response telephone survey of 928 randomly selected Ontarians 18 years of age and older. The poll was conducted on April 7th, 2014.

Results based on the total sample are considered accurate +/- 3%, 19 times out of 20. Subsample results will be less accurate. Margins of error for subsample (such as age, gender) results are available at www.forumresearch.com/samplestim.asp

Where appropriate, the data has been statistically weighted by age, region, and other variables to ensure that the sample reflects the actual population according to the latest Census data.

This research is not necessarily predictive of future outcomes, but rather, captures opinion at one point in time. Forum Research conducted this poll as a public service and to demonstrate our survey research capabilities. Forum houses its poll results in the Data Library of the Department of Political Science at the University of Toronto.

With offices across Canada and around the world, 100% Canadian-owned Forum Research is one of the country's leading survey research firms. This Forum Poll™ and other polls may be found at Forum's poll archive at www.forumresearch.com/polls.asp

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Approval of The Beer Store

‘Do you approve or disapprove of the job The Beer Store does retailing beer in Ontario?’

[All Respondents]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 928 | 55 | 107 | 203 | 264 | 299 | 462 | 466 |
| Approve | 52 | 53 | 50 | 57 | 52 | 48 | 54 | 50 |
| Disapprove | 28 | 35 | 28 | 26 | 25 | 24 | 35 | 22 |
| Don't know | 19 | 12 | 22 | 16 | 22 | 29 | 10 | 27 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 928 | 153 | 180 | 285 | 465 | 172 | 138 |
| Approve | 52 | 47 | 43 | 54 | 50 | 55 | 62 |
| Disapprove | 28 | 23 | 31 | 31 | 31 | 27 | 27 |
| Don't know | 19 | 30 | 26 | 14 | 19 | 17 | 12 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 928 | 85 | 137 | 145 | 123 | 94 | 154 |
| Approve | 52 | 61 | 36 | 44 | 58 | 57 | 57 |
| Disapprove | 28 | 28 | 36 | 38 | 28 | 26 | 28 |
| Don't know | 19 | 11 | 28 | 18 | 14 | 17 | 15 |

Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|------------|-------|--------------|---------|-----|-------|-------|
| Sample | 928 | 322 | 272 | 198 | 64 | 29 |
| Approve | 52 | 51 | 47 | 64 | 62 | 40 |
| Disapprove | 28 | 31 | 34 | 21 | 30 | 34 |
| Don't know | 19 | 18 | 20 | 15 | 8 | 26 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|------------|-------|-----|-----|------|
| Sample | 928 | 193 | 735 | 82 |
| Approve | 52 | 52 | 52 | 51 |
| Disapprove | 28 | 33 | 26 | 26 |
| Don't know | 19 | 14 | 22 | 23 |

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Purchase Beer

'Do you purchase beer at retail to drink at home?'

[All Respondents]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|--------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 928 | 55 | 107 | 203 | 264 | 299 | 462 | 466 |
| Yes | 65 | 69 | 65 | 69 | 69 | 52 | 78 | 53 |
| No | 35 | 31 | 35 | 31 | 31 | 48 | 22 | 47 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|--------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 928 | 153 | 180 | 285 | 465 | 172 | 138 |
| Yes | 65 | 57 | 63 | 63 | 63 | 66 | 77 |
| No | 35 | 43 | 37 | 37 | 37 | 34 | 23 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|--------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 928 | 85 | 137 | 145 | 123 | 94 | 154 |
| Yes | 65 | 72 | 44 | 69 | 68 | 82 | 78 |
| No | 35 | 28 | 56 | 31 | 32 | 18 | 22 |

Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|--------|-------|--------------|---------|-----|-------|-------|
| Sample | 928 | 322 | 272 | 198 | 64 | 29 |
| Yes | 65 | 68 | 61 | 67 | 66 | 68 |
| No | 35 | 32 | 39 | 33 | 34 | 32 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|--------|-------|-----|-----|------|
| Sample | 928 | 193 | 735 | 82 |
| Yes | 65 | 75 | 60 | 67 |
| No | 35 | 25 | 40 | 33 |

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Frequency of Beer Purchases

'How often do you purchase beer?'

[Purchase beer at retail to drink at home]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|----------------------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 588 | 38 | 72 | 141 | 176 | 161 | 343 | 245 |
| NET: TOP2 | 37 | 52 | 37 | 35 | 28 | 19 | 43 | 30 |
| NET: BTM2 | 63 | 48 | 63 | 65 | 72 | 81 | 57 | 70 |
| Weekly or more often | 17 | 27 | 21 | 10 | 14 | 7 | 20 | 13 |
| Once every two weeks or so | 20 | 25 | 16 | 26 | 14 | 12 | 23 | 16 |
| Every month or so | 29 | 26 | 30 | 29 | 36 | 30 | 28 | 31 |
| Less often than this | 34 | 22 | 34 | 36 | 36 | 51 | 29 | 40 |
| Mean | 2 | 2 | 2 | 2 | 2 | 1 | 2 | 2 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|----------------------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 588 | 95 | 107 | 176 | 283 | 112 | 98 |
| NET: TOP2 | 37 | 23 | 43 | 45 | 44 | 23 | 46 |
| NET: BTM2 | 63 | 77 | 57 | 55 | 56 | 77 | 54 |
| Weekly or more often | 17 | 12 | 13 | 17 | 15 | 13 | 31 |
| Once every two weeks or so | 20 | 11 | 30 | 29 | 29 | 10 | 15 |
| Every month or so | 29 | 26 | 34 | 23 | 28 | 44 | 17 |
| Less often than this | 34 | 50 | 23 | 31 | 28 | 33 | 37 |
| Mean | 2 | 1 | 2 | 2 | 2 | 2 | 3 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|----------------------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 588 | 44 | 69 | 86 | 81 | 76 | 124 |
| NET: TOP2 | 37 | 46 | 55 | 21 | 37 | 38 | 42 |
| NET: BTM2 | 63 | 54 | 45 | 79 | 63 | 62 | 58 |
| Weekly or more often | 17 | 23 | 31 | 9 | 17 | 14 | 18 |
| Once every two weeks or so | 20 | 23 | 24 | 13 | 21 | 23 | 24 |
| Every month or so | 29 | 9 | 20 | 46 | 37 | 20 | 33 |
| Less often than this | 34 | 45 | 25 | 33 | 26 | 42 | 25 |
| Mean | 2 | 2 | 3 | 1 | 2 | 2 | 2 |

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Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|----------------------------|-------|--------------|---------|-----|-------|-------|
| Sample | 588 | 205 | 161 | 135 | 43 | 19 |
| NET: TOP2 | 37 | 40 | 43 | 26 | 53 | 20 |
| NET: BTM2 | 63 | 60 | 57 | 74 | 47 | 80 |
| Weekly or more often | 17 | 15 | 24 | 9 | 30 | 11 |
| Once every two weeks or so | 20 | 25 | 19 | 16 | 23 | 9 |
| Every month or so | 29 | 34 | 26 | 24 | 30 | 27 |
| Less often than this | 34 | 26 | 31 | 51 | 16 | 53 |
| Mean | 2 | 2 | 2 | 1 | 3 | 1 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|----------------------------|-------|-----|-----|------|
| Sample | 588 | 143 | 445 | 50 |
| NET: TOP2 | 37 | 41 | 35 | 32 |
| NET: BTM2 | 63 | 59 | 65 | 68 |
| Weekly or more often | 17 | 18 | 17 | 15 |
| Once every two weeks or so | 20 | 24 | 18 | 17 |
| Every month or so | 29 | 31 | 28 | 35 |
| Less often than this | 34 | 27 | 37 | 33 |
| Mean | 2 | 2 | 2 | 2 |

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Where Beer is Purchased

'Are you most likely to purchase beer at The Beer Store or at the LCBO?'

[Purchase beer at retail to drink at home]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|----------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 588 | 38 | 72 | 141 | 176 | 161 | 343 | 245 |
| The Beer Store | 51 | 44 | 45 | 57 | 58 | 54 | 50 | 52 |
| LCBO | 41 | 52 | 42 | 33 | 33 | 36 | 41 | 41 |
| Both equally | 8 | 4 | 13 | 9 | 9 | 10 | 10 | 7 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|----------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 588 | 95 | 107 | 176 | 283 | 112 | 98 |
| The Beer Store | 51 | 51 | 31 | 56 | 46 | 54 | 58 |
| LCBO | 41 | 41 | 65 | 35 | 47 | 36 | 32 |
| Both equally | 8 | 8 | 5 | 9 | 7 | 10 | 10 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|----------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 588 | 44 | 69 | 86 | 81 | 76 | 124 |
| The Beer Store | 51 | 50 | 67 | 41 | 54 | 46 | 46 |
| LCBO | 41 | 47 | 30 | 49 | 34 | 48 | 44 |
| Both equally | 8 | 3 | 3 | 9 | 12 | 6 | 10 |

Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|----------------|-------|--------------|---------|-----|-------|-------|
| Sample | 588 | 205 | 161 | 135 | 43 | 19 |
| The Beer Store | 51 | 51 | 49 | 51 | 48 | 58 |
| LCBO | 41 | 40 | 45 | 40 | 40 | 37 |
| Both equally | 8 | 9 | 6 | 9 | 12 | 5 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|----------------|-------|-----|-----|------|
| Sample | 588 | 143 | 445 | 50 |
| The Beer Store | 51 | 43 | 55 | 43 |
| LCBO | 41 | 46 | 38 | 50 |
| Both equally | 8 | 11 | 7 | 7 |

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Appropriate Store for Beer Sales

‘What do you think is the most appropriate kind of store for retailing beer?’

[Purchase beer at retail to drink at home]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|-------------------------|------------|-----------|-----------|------------|------------|------------|------------|------------|
| Sample | 588 | 38 | 72 | 141 | 176 | 161 | 343 | 245 |
| The Beer Store | 30 | 32 | 31 | 27 | 29 | 31 | 26 | 35 |
| LCBO | 10 | 7 | 11 | 15 | 8 | 13 | 11 | 9 |
| Convenience stores | 20 | 33 | 17 | 14 | 10 | 19 | 23 | 17 |
| Grocery stores | 22 | 14 | 25 | 26 | 28 | 19 | 20 | 23 |
| Brewery-operated stores | 6 | 2 | 3 | 7 | 10 | 11 | 5 | 6 |
| Somewhere else | 0 | 0 | 1 | 0 | 1 | 0 | 1 | 0 |
| All of these | 11 | 13 | 12 | 10 | 12 | 7 | 12 | 9 |
| Don't know | 1 | 0 | 0 | 1 | 1 | 1 | 1 | 0 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|-------------------------|------------|-----------|------------|------------|------------|------------|-----------|
| Sample | 588 | 95 | 107 | 176 | 283 | 112 | 98 |
| The Beer Store | 30 | 26 | 18 | 30 | 25 | 29 | 47 |
| LCBO | 10 | 11 | 13 | 13 | 13 | 7 | 8 |
| Convenience stores | 20 | 11 | 20 | 21 | 20 | 22 | 24 |
| Grocery stores | 22 | 26 | 28 | 19 | 23 | 26 | 11 |
| Brewery-operated stores | 6 | 8 | 4 | 7 | 6 | 3 | 6 |
| Somewhere else | 0 | 0 | 1 | 0 | 0 | 1 | 1 |
| All of these | 11 | 14 | 16 | 11 | 13 | 11 | 4 |
| Don't know | 1 | 3 | 0 | 0 | 0 | 1 | 0 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|-------------------------|------------|-----------|------------|------------|------------|-------------|--------------|
| Sample | 588 | 44 | 69 | 86 | 81 | 76 | 124 |
| The Beer Store | 30 | 39 | 17 | 22 | 35 | 25 | 26 |
| LCBO | 10 | 5 | 8 | 13 | 6 | 17 | 13 |
| Convenience stores | 20 | 40 | 33 | 21 | 14 | 16 | 16 |
| Grocery stores | 22 | 6 | 34 | 20 | 20 | 24 | 28 |
| Brewery-operated stores | 6 | 6 | 7 | 9 | 7 | 7 | 1 |
| Somewhere else | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| All of these | 11 | 2 | 1 | 15 | 18 | 12 | 14 |
| Don't know | 1 | 1 | 0 | 1 | 0 | 0 | 2 |

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Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|-------------------------|-------|--------------|---------|-----|-------|-------|
| Sample | 588 | 205 | 161 | 135 | 43 | 19 |
| The Beer Store | 30 | 23 | 30 | 41 | 31 | 22 |
| LCBO | 10 | 6 | 8 | 18 | 5 | 27 |
| Convenience stores | 20 | 29 | 20 | 10 | 18 | 11 |
| Grocery stores | 22 | 24 | 20 | 17 | 25 | 35 |
| Brewery-operated stores | 6 | 5 | 4 | 9 | 6 | 6 |
| Somewhere else | 0 | 0 | 0 | 1 | 3 | 0 |
| All of these | 11 | 12 | 17 | 3 | 11 | 0 |
| Don't know | 1 | 1 | 0 | 0 | 1 | 0 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|-------------------------|-------|-----|-----|------|
| Sample | 588 | 143 | 445 | 50 |
| The Beer Store | 30 | 30 | 30 | 37 |
| LCBO | 10 | 14 | 8 | 14 |
| Convenience stores | 20 | 21 | 20 | 18 |
| Grocery stores | 22 | 23 | 21 | 20 |
| Brewery-operated stores | 6 | 2 | 8 | 3 |
| Somewhere else | 0 | 0 | 1 | 0 |
| All of these | 11 | 10 | 12 | 9 |
| Don't know | 1 | 1 | 1 | 0 |

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Purchasing Beer at a Convenience Store

‘How likely would you be to purchase beer in a convenience store or a grocery store?’

[Purchase beer at retail to drink at home]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|-------------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 588 | 38 | 72 | 141 | 176 | 161 | 343 | 245 |
| NET: TOP2 | 70 | 70 | 74 | 72 | 68 | 63 | 70 | 69 |
| NET: BTM2 | 30 | 30 | 26 | 27 | 31 | 37 | 29 | 30 |
| Very likely | 54 | 63 | 57 | 50 | 50 | 41 | 56 | 51 |
| Somewhat likely | 16 | 7 | 17 | 22 | 18 | 23 | 14 | 18 |
| Not very likely | 18 | 12 | 17 | 19 | 23 | 28 | 16 | 21 |
| Not at all likely | 11 | 18 | 9 | 9 | 8 | 9 | 13 | 9 |
| Don't know | 0 | 0 | 0 | 1 | 1 | 0 | 0 | 0 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|-------------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 588 | 95 | 107 | 176 | 283 | 112 | 98 |
| NET: TOP2 | 70 | 78 | 78 | 69 | 73 | 70 | 58 |
| NET: BTM2 | 30 | 21 | 22 | 30 | 27 | 30 | 42 |
| Very likely | 54 | 48 | 66 | 50 | 57 | 58 | 47 |
| Somewhat likely | 16 | 30 | 12 | 19 | 16 | 12 | 11 |
| Not very likely | 18 | 12 | 12 | 22 | 18 | 23 | 18 |
| Not at all likely | 11 | 9 | 9 | 8 | 9 | 7 | 25 |
| Don't know | 0 | 1 | 1 | 0 | 1 | 0 | 0 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|-------------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 588 | 44 | 69 | 86 | 81 | 76 | 124 |
| NET: TOP2 | 70 | 66 | 76 | 77 | 67 | 72 | 81 |
| NET: BTM2 | 30 | 34 | 23 | 23 | 33 | 28 | 18 |
| Very likely | 54 | 55 | 64 | 63 | 45 | 53 | 61 |
| Somewhat likely | 16 | 11 | 12 | 14 | 22 | 20 | 20 |
| Not very likely | 18 | 8 | 15 | 9 | 19 | 16 | 12 |
| Not at all likely | 11 | 25 | 8 | 14 | 13 | 12 | 7 |
| Don't know | 0 | 0 | 1 | 1 | 0 | 0 | 1 |

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| % | Total | Conservative | Liberal | NDP | Green | Other |
|-------------------|-------|--------------|---------|-----|-------|-------|
| Sample | 588 | 205 | 161 | 135 | 43 | 19 |
| NET: TOP2 | 70 | 80 | 78 | 51 | 68 | 60 |
| NET: BTM2 | 30 | 20 | 21 | 49 | 32 | 40 |
| Very likely | 54 | 64 | 62 | 33 | 47 | 55 |
| Somewhat likely | 16 | 16 | 16 | 17 | 20 | 5 |
| Not very likely | 18 | 16 | 16 | 24 | 14 | 10 |
| Not at all likely | 11 | 4 | 5 | 25 | 18 | 30 |
| Don't know | 0 | 0 | 0 | 1 | 0 | 0 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|-------------------|-------|-----|-----|------|
| Sample | 588 | 143 | 445 | 50 |
| NET: TOP2 | 70 | 73 | 68 | 65 |
| NET: BTM2 | 30 | 27 | 32 | 35 |
| Very likely | 54 | 57 | 52 | 49 |
| Somewhat likely | 16 | 16 | 16 | 16 |
| Not very likely | 18 | 18 | 18 | 23 |
| Not at all likely | 11 | 8 | 13 | 12 |
| Don't know | 0 | 0 | 0 | 0 |

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TORONTO
April 7th, 2014

Purchase Beer with a 10% Surcharge

‘How likely would you be to purchase beer in a convenience store or a grocery store if it cost about 10% more than at The Beer Store or the LCBO?’

[Purchase beer at retail to drink at home]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|-------------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 588 | 38 | 72 | 141 | 176 | 161 | 343 | 245 |
| NET: TOP2 | 28 | 39 | 27 | 28 | 17 | 19 | 26 | 31 |
| NET: BTM2 | 70 | 60 | 70 | 71 | 81 | 78 | 72 | 68 |
| Very likely | 16 | 28 | 14 | 13 | 6 | 8 | 16 | 16 |
| Somewhat likely | 12 | 10 | 14 | 14 | 10 | 12 | 10 | 15 |
| Not very likely | 38 | 28 | 32 | 42 | 53 | 44 | 37 | 38 |
| Not at all likely | 32 | 32 | 38 | 29 | 28 | 35 | 35 | 29 |
| Don't know | 2 | 2 | 3 | 1 | 2 | 2 | 2 | 2 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|-------------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 588 | 95 | 107 | 176 | 283 | 112 | 98 |
| NET: TOP2 | 28 | 18 | 43 | 26 | 33 | 30 | 22 |
| NET: BTM2 | 70 | 81 | 55 | 72 | 65 | 68 | 77 |
| Very likely | 16 | 6 | 24 | 12 | 17 | 21 | 16 |
| Somewhat likely | 12 | 12 | 19 | 14 | 16 | 9 | 5 |
| Not very likely | 38 | 40 | 31 | 38 | 35 | 41 | 39 |
| Not at all likely | 32 | 41 | 24 | 34 | 30 | 27 | 38 |
| Don't know | 2 | 1 | 2 | 2 | 2 | 2 | 1 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|-------------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 588 | 44 | 69 | 86 | 81 | 76 | 124 |
| NET: TOP2 | 28 | 42 | 34 | 27 | 24 | 28 | 27 |
| NET: BTM2 | 70 | 56 | 63 | 73 | 71 | 69 | 73 |
| Very likely | 16 | 37 | 19 | 21 | 14 | 10 | 9 |
| Somewhat likely | 12 | 5 | 15 | 6 | 10 | 18 | 17 |
| Not very likely | 38 | 21 | 42 | 46 | 42 | 38 | 40 |
| Not at all likely | 32 | 34 | 21 | 27 | 29 | 31 | 33 |
| Don't know | 2 | 2 | 3 | 0 | 5 | 2 | 0 |

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Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|-------------------|-------|--------------|---------|-----|-------|-------|
| Sample | 588 | 205 | 161 | 135 | 43 | 19 |
| NET: TOP2 | 28 | 34 | 34 | 16 | 28 | 23 |
| NET: BTM2 | 70 | 63 | 65 | 83 | 72 | 77 |
| Very likely | 16 | 23 | 19 | 7 | 1 | 23 |
| Somewhat likely | 12 | 11 | 15 | 9 | 27 | 0 |
| Not very likely | 38 | 38 | 38 | 38 | 36 | 39 |
| Not at all likely | 32 | 25 | 26 | 44 | 35 | 38 |
| Don't know | 2 | 3 | 1 | 1 | 0 | 0 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|-------------------|-------|-----|-----|------|
| Sample | 588 | 143 | 445 | 50 |
| NET: TOP2 | 28 | 37 | 23 | 44 |
| NET: BTM2 | 70 | 63 | 74 | 56 |
| Very likely | 16 | 19 | 14 | 23 |
| Somewhat likely | 12 | 18 | 9 | 21 |
| Not very likely | 38 | 31 | 42 | 29 |
| Not at all likely | 32 | 32 | 33 | 27 |
| Don't know | 2 | 0 | 3 | 0 |

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Approval of Convenience and Grocery Stores Selling Beer

'Do you approve or disapprove of allowing convenience stores and grocery stores to sell beer in Ontario?'

[All Respondents]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 928 | 55 | 107 | 203 | 264 | 299 | 462 | 466 |
| Approve | 48 | 49 | 47 | 47 | 50 | 45 | 54 | 42 |
| Disapprove | 44 | 44 | 43 | 45 | 42 | 45 | 39 | 49 |
| Don't know | 8 | 6 | 10 | 8 | 7 | 10 | 7 | 9 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 928 | 153 | 180 | 285 | 465 | 172 | 138 |
| Approve | 48 | 54 | 55 | 44 | 48 | 48 | 41 |
| Disapprove | 44 | 37 | 40 | 46 | 44 | 41 | 55 |
| Don't know | 8 | 10 | 5 | 10 | 8 | 11 | 4 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 928 | 85 | 137 | 145 | 123 | 94 | 154 |
| Approve | 48 | 52 | 52 | 51 | 47 | 52 | 55 |
| Disapprove | 44 | 44 | 43 | 43 | 38 | 40 | 36 |
| Don't know | 8 | 5 | 5 | 6 | 15 | 8 | 9 |

Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|------------|-------|--------------|---------|-----|-------|-------|
| Sample | 928 | 322 | 272 | 198 | 64 | 29 |
| Approve | 48 | 59 | 48 | 33 | 46 | 57 |
| Disapprove | 44 | 34 | 46 | 55 | 51 | 30 |
| Don't know | 8 | 7 | 6 | 12 | 3 | 14 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|------------|-------|-----|-----|------|
| Sample | 928 | 193 | 735 | 82 |
| Approve | 48 | 48 | 48 | 40 |
| Disapprove | 44 | 39 | 46 | 48 |
| Don't know | 8 | 13 | 6 | 12 |

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Rating of The Beer Store

‘How would you rate The Beer Store for offering excellent products and services?’

[All Respondents]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 928 | 55 | 107 | 203 | 264 | 299 | 462 | 466 |
| NET: TOP2 | 55 | 45 | 59 | 63 | 63 | 51 | 57 | 54 |
| NET: BTM2 | 27 | 36 | 29 | 24 | 20 | 21 | 34 | 21 |
| Excellent | 30 | 24 | 30 | 38 | 32 | 25 | 33 | 26 |
| Good | 25 | 21 | 28 | 25 | 31 | 25 | 23 | 27 |
| Fair | 18 | 19 | 25 | 17 | 13 | 15 | 23 | 14 |
| Poor | 9 | 17 | 4 | 7 | 7 | 6 | 11 | 7 |
| Don't know | 18 | 19 | 13 | 13 | 17 | 28 | 10 | 25 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 928 | 153 | 180 | 285 | 465 | 172 | 138 |
| NET: TOP2 | 55 | 47 | 44 | 58 | 52 | 60 | 64 |
| NET: BTM2 | 27 | 27 | 35 | 26 | 30 | 22 | 27 |
| Excellent | 30 | 28 | 18 | 29 | 24 | 32 | 44 |
| Good | 25 | 20 | 26 | 29 | 28 | 28 | 20 |
| Fair | 18 | 19 | 21 | 18 | 19 | 13 | 24 |
| Poor | 9 | 8 | 15 | 8 | 11 | 10 | 2 |
| Don't know | 18 | 26 | 21 | 16 | 18 | 18 | 9 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 928 | 85 | 137 | 145 | 123 | 94 | 154 |
| NET: TOP2 | 55 | 51 | 41 | 54 | 61 | 59 | 66 |
| NET: BTM2 | 27 | 34 | 35 | 30 | 28 | 25 | 26 |
| Excellent | 30 | 40 | 21 | 24 | 33 | 31 | 38 |
| Good | 25 | 11 | 19 | 30 | 28 | 28 | 28 |
| Fair | 18 | 31 | 23 | 11 | 17 | 21 | 18 |
| Poor | 9 | 3 | 13 | 19 | 11 | 4 | 8 |
| Don't know | 18 | 15 | 24 | 16 | 11 | 15 | 8 |

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Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|------------|-------|--------------|---------|-----|-------|-------|
| Sample | 928 | 322 | 272 | 198 | 64 | 29 |
| NET: TOP2 | 55 | 50 | 57 | 59 | 63 | 57 |
| NET: BTM2 | 27 | 36 | 23 | 20 | 31 | 29 |
| Excellent | 30 | 26 | 26 | 37 | 39 | 40 |
| Good | 25 | 25 | 31 | 22 | 24 | 17 |
| Fair | 18 | 23 | 14 | 13 | 26 | 26 |
| Poor | 9 | 13 | 9 | 7 | 5 | 3 |
| Don't know | 18 | 14 | 20 | 21 | 6 | 14 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|------------|-------|-----|-----|------|
| Sample | 928 | 193 | 735 | 82 |
| NET: TOP2 | 55 | 58 | 54 | 58 |
| NET: BTM2 | 27 | 30 | 26 | 23 |
| Excellent | 30 | 29 | 30 | 26 |
| Good | 25 | 28 | 24 | 32 |
| Fair | 18 | 19 | 18 | 11 |
| Poor | 9 | 10 | 8 | 12 |
| Don't know | 18 | 13 | 20 | 19 |

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Owner of The Beer Store

'As far as you know, is The Beer Store Canadian-owned or foreign-owned?'

[All Respondents]

Age / Gender

| % | Total | 18-34 | 35-44 | 45-54 | 55-64 | 65+ | Male | Female |
|----------------|-------|-------|-------|-------|-------|-----|------|--------|
| Sample | 928 | 55 | 107 | 203 | 264 | 299 | 462 | 466 |
| Canadian-owned | 62 | 63 | 61 | 69 | 64 | 53 | 61 | 63 |
| Foreign-owned | 22 | 27 | 20 | 16 | 19 | 21 | 29 | 15 |
| Don't know | 16 | 9 | 19 | 14 | 17 | 26 | 10 | 22 |

Region

| % | Total | E. Ont | 416 | 905 | GTA | SW. Ont | N. Ont |
|----------------|-------|--------|-----|-----|-----|---------|--------|
| Sample | 928 | 153 | 180 | 285 | 465 | 172 | 138 |
| Canadian-owned | 62 | 58 | 52 | 65 | 59 | 66 | 69 |
| Foreign-owned | 22 | 17 | 33 | 20 | 25 | 20 | 16 |
| Don't know | 16 | 25 | 15 | 16 | 16 | 13 | 14 |

Household Income

| % | Total | <\$20K | \$20-\$40K | \$40-\$60K | \$60-\$80K | \$80-\$100K | \$100-\$250K |
|----------------|-------|--------|------------|------------|------------|-------------|--------------|
| Sample | 928 | 85 | 137 | 145 | 123 | 94 | 154 |
| Canadian-owned | 62 | 66 | 69 | 56 | 69 | 63 | 63 |
| Foreign-owned | 22 | 17 | 14 | 29 | 16 | 27 | 29 |
| Don't know | 16 | 17 | 18 | 15 | 15 | 10 | 8 |

Provincial Party Preference

| % | Total | Conservative | Liberal | NDP | Green | Other |
|----------------|-------|--------------|---------|-----|-------|-------|
| Sample | 928 | 322 | 272 | 198 | 64 | 29 |
| Canadian-owned | 62 | 59 | 64 | 66 | 62 | 73 |
| Foreign-owned | 22 | 25 | 19 | 23 | 21 | 15 |
| Don't know | 16 | 16 | 17 | 11 | 17 | 13 |

Have Children / Mothers

| % | Total | Yes | No | Moms |
|----------------|-------|-----|-----|------|
| Sample | 928 | 193 | 735 | 82 |
| Canadian-owned | 62 | 58 | 64 | 61 |
| Foreign-owned | 22 | 27 | 19 | 18 |
| Don't know | 16 | 15 | 17 | 21 |

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