

Cannabis Culture Poll

November 2018



Civilized.

About the poll

The 2018 Fall Cannabis Culture Poll explores attitudes and views on cannabis to better understand the lifestyle of modern cannabis consumers and the future of the industry.

Beyond capturing views on cannabis consumption and the general habits and behaviors of cannabis consumers and non-consumers, the responses shed light on the growing green economy, the current maturation challenges of the industry, and future challenges the industry will likely face as it continues to evolve. The findings tell the story of an industry flush with opportunity and growing support from the general public but that will face major challenges without proactively engaging in large-scale public education campaigns.

The poll was conducted by PSB, a full-service research insights agency. Interviews were conducted online among 1,200 US adults age 21+ (including an oversample of 200 Cannabis consumers), and 800 Canadian adults age 19+ (including an oversample of 200 Cannabis consumers), between September 26 and October 4, 2018.

To learn more about the findings, or to discuss the state of the industry, please contact cannabispoll@bcw-global.com

Key findings

Most have an open mind – a majority of Americans would support legalization, while a majority of Canadians approve of legal cannabis laws going into effect

- Medical cannabis enjoys particular support at a policy level – more than two in three from each country approve of medicinal use
- Legalization is slowly gaining support on both sides of the border, including in the stricter and more conservative United States

The barrier to consumption is low for many who do not currently partake, especially in the US

- One-third of US non-consumers who have never used cannabis before say they would consider trying it
- A plurality of US non-consumers say they have “no particular reason” for abstaining from cannabis consumption

Cannabis is seen as a viable medical solution, even by non-consumers

- Majorities of non-consumers agree that cannabis has medical benefits, even though they don't use it themselves

Key findings

Cannabis consumers are not so different from non-consumers in their lifestyles and daily habits

- Consumers are generally more likely than their non-consuming peers to participate in cultural and social events, such as going to sporting events, concerts, bars, etc.

The “Green Economy” surrounding cannabis products, businesses, and transactions is fertile for continued growth

- Cannabis consumers are buying significant quantities of cannabis on a regular basis, and most are spending more than \$50 per month on cannabis-related items
- Strong majorities of consumers – and significant portions of non-consumers – would be willing to spend money with cannabis-related businesses (such as dispensary storefronts)

As it grows in the public eye, the cannabis industry can implement initiatives to gain more widespread admiration and trust

- Among the most popular proposed initiatives were partnerships with health organizations to regulate medical cannabis and funding for research on cannabis’ physical and mental effects

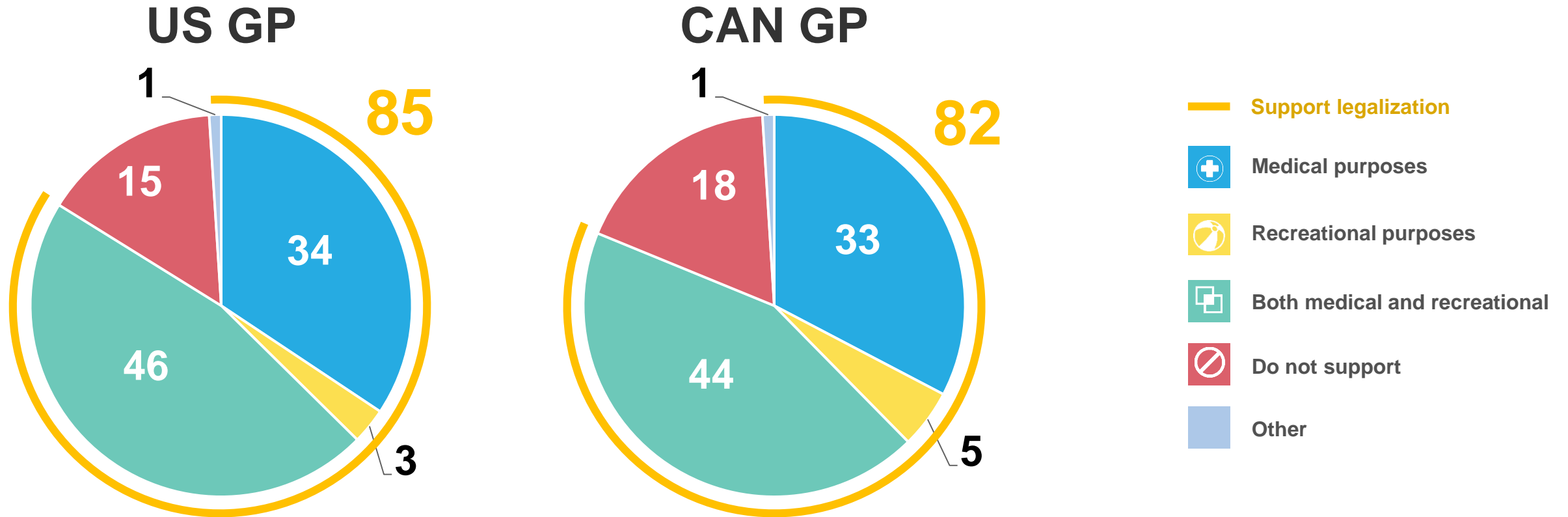
The State of Cannabis



The State of Cannabis

Majorities in both countries support legalization of cannabis in some form; medical use is especially accepted

Do you support legalizing cannabis for...?

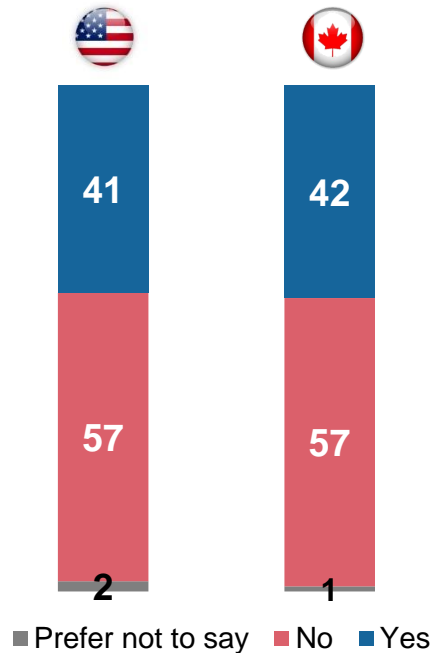


While many non-consumers have never tried cannabis, a majority of them believe in the medical benefits

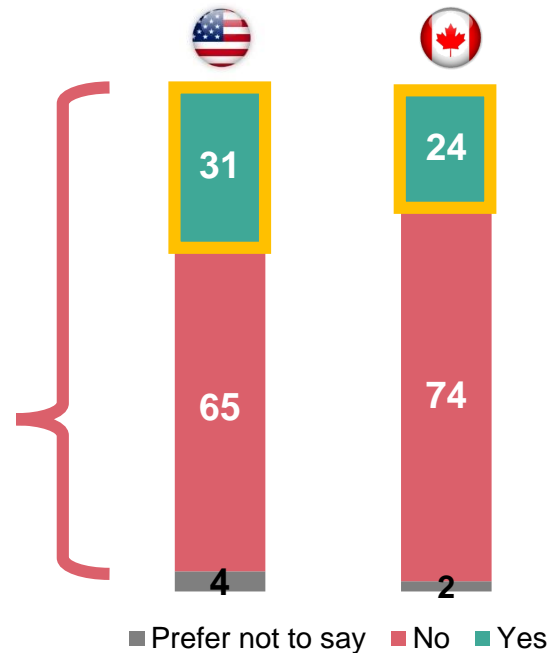
Canadian non-consumers, however, are more likely to cite health risks and mental effects as deterrents

(If not a consumer)

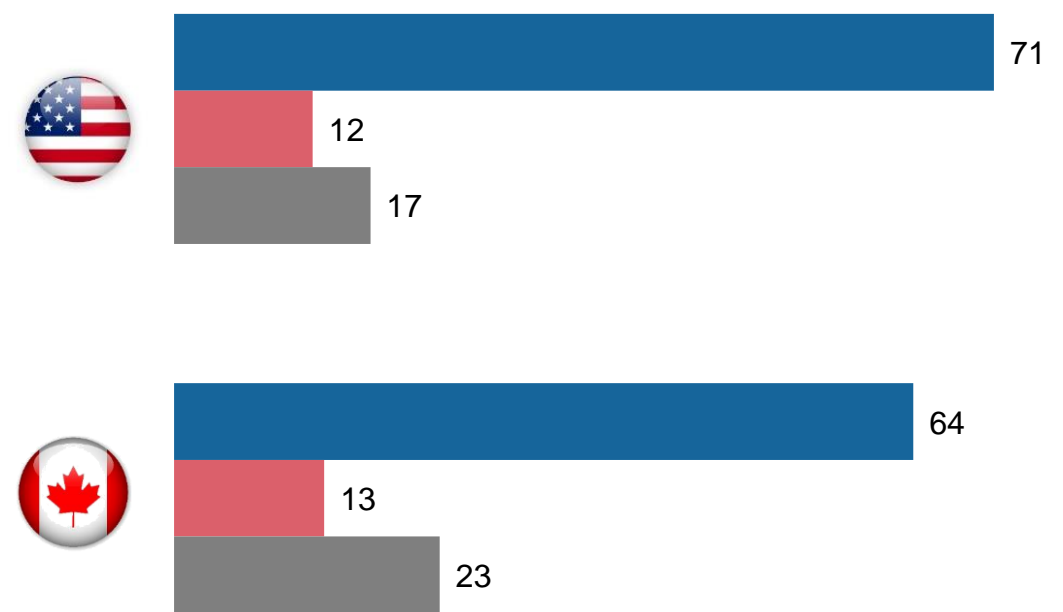
Have you ever used cannabis before?



(If not a consumer / have not consumed)
Would you ever consider using cannabis?



(If not a consumer)
Do you think cannabis has medical benefits?



Consumer Behaviors

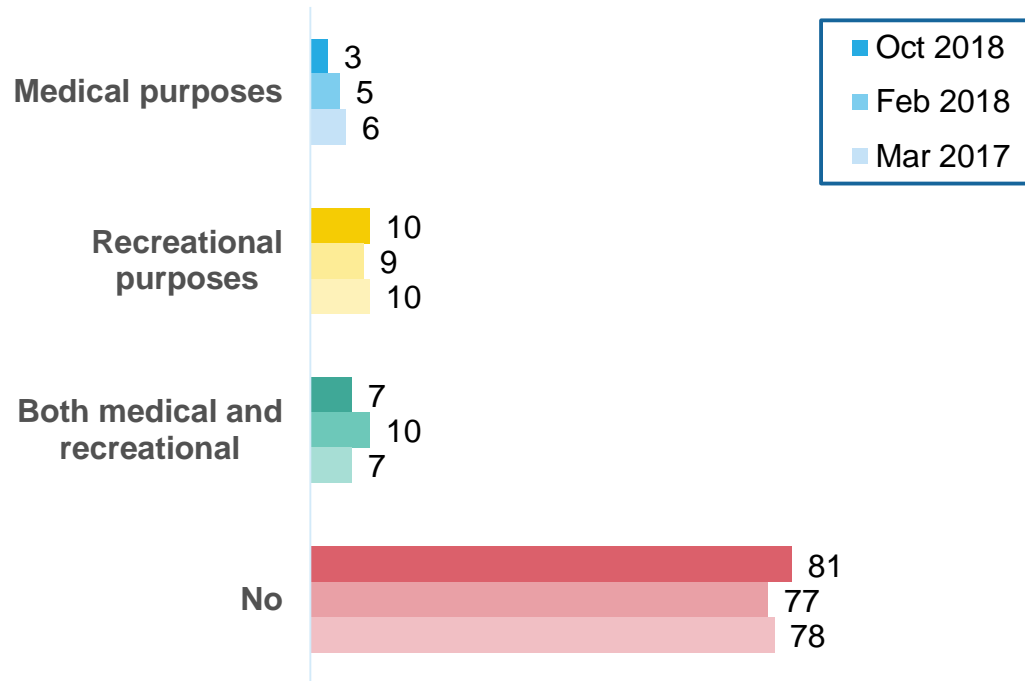
As barriers to cannabis use fall, consumption increases – especially in Canada

Use in Canada is climbing slowly, likely as full legalization approaches



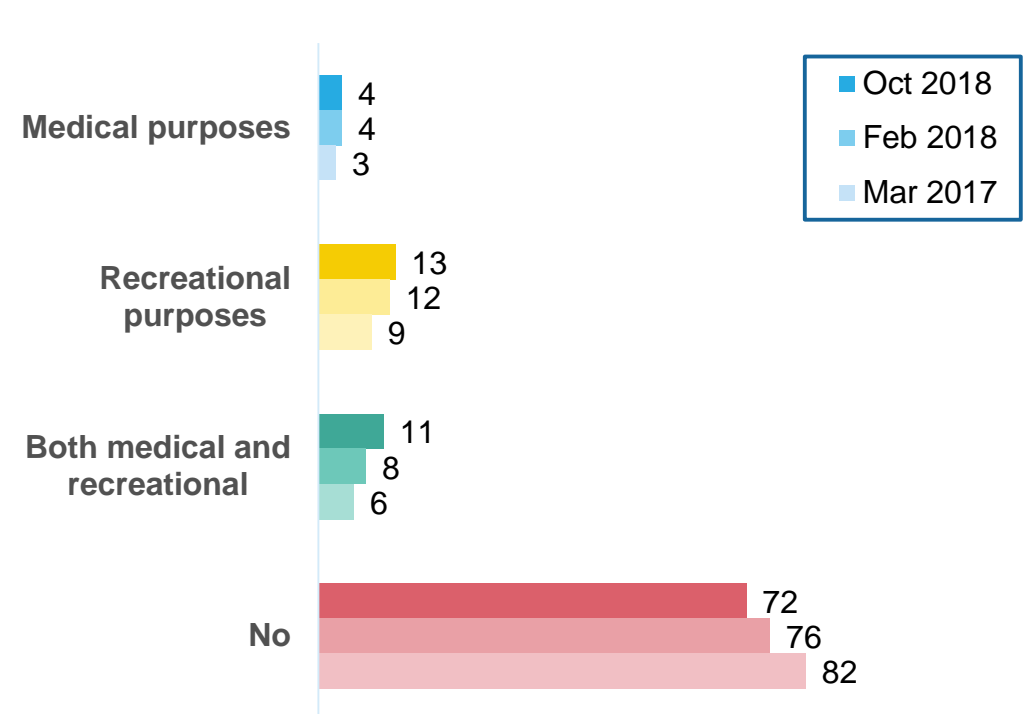
Do you currently use cannabis for...

Among US GP



Do you currently use cannabis for...

Among CAN GP



*Note that categories of use was asked as one question with multiple answer choices in previous waves, but was changed to two separate questions for medical and recreational use in the October 2018 wave

Cannabis consumers partake at least once per week and like to consume in the evening; they also enjoy a variety of recreation



74% of US consumers and 69% of Canadian consumers enjoy cannabis at least once per week (up from 68% and 66% respectively in February)



Evening is the most popular time to consume in both countries, as 48% US and 51% Canadian users say “late evening” is one of their favorite times to indulge (39% US and 38% CAN say “early evening”)



Consumers, they’re just like us! But more likely to have done these things than non-consumers in the past...

Month

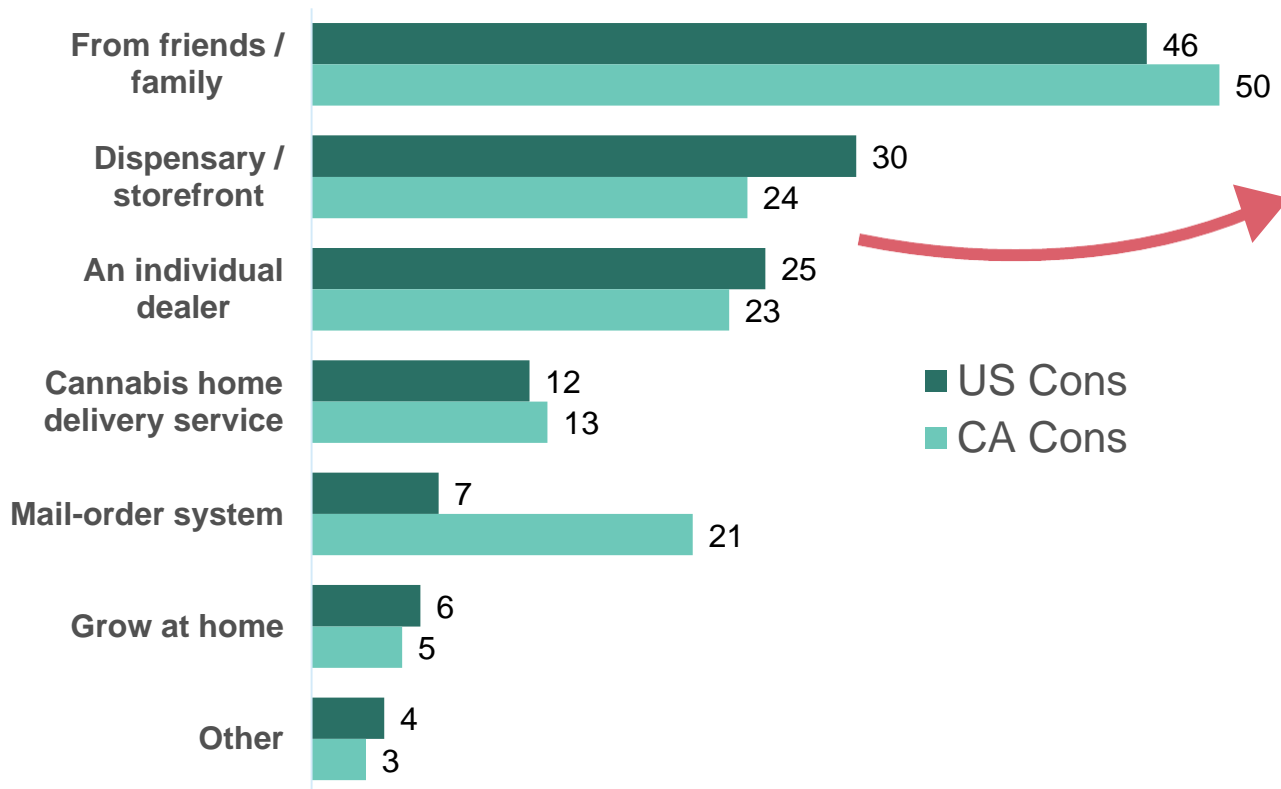
- Streamed content online (Netflix, Hulu, Amazon, etc)
- Played a video, computer, or mobile game
- Consumed alcohol
- Consumed tobacco
- (CAN) Used a social networking site
- (CAN) Watched a movie

Three months

- Been to a park
- Gone to a pub, bar or club
- (US) Attended a concert
- (US) Traveled for work

Most consumers get their cannabis from friends and family, but dispensaries are the second most popular source

(IF CONSUMER) Where do you purchase your cannabis?



(IF DISPENSARY CUSTOMER) What are your favorite things about purchasing cannabis from a dispensary versus another source?

Attribute	US Cons	CAN Cons
Higher quality products	53	55
Safety of products	49	44
Range of products	44	47
Expert staff who work there	43	49
Convenience of location	40	54



84%



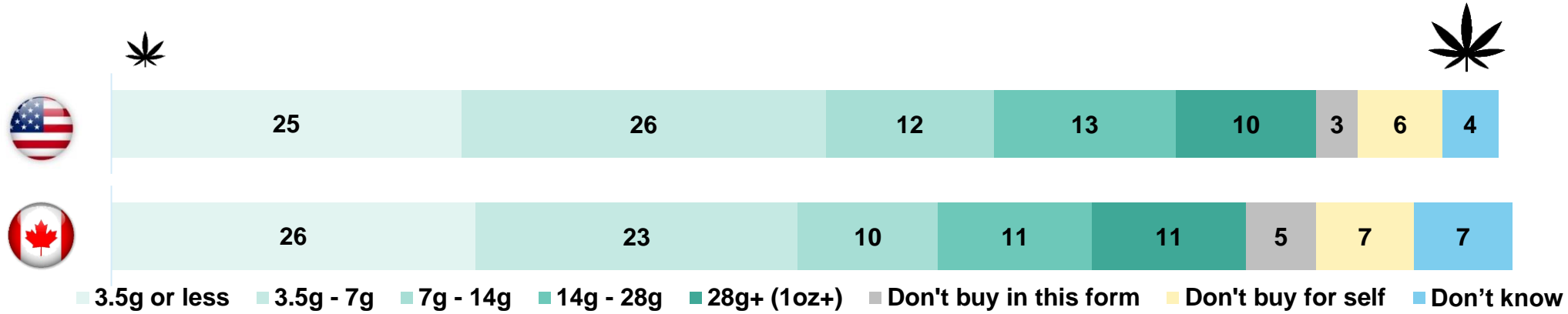
74%

of consumers who don't buy from a dispensary would consider trying it

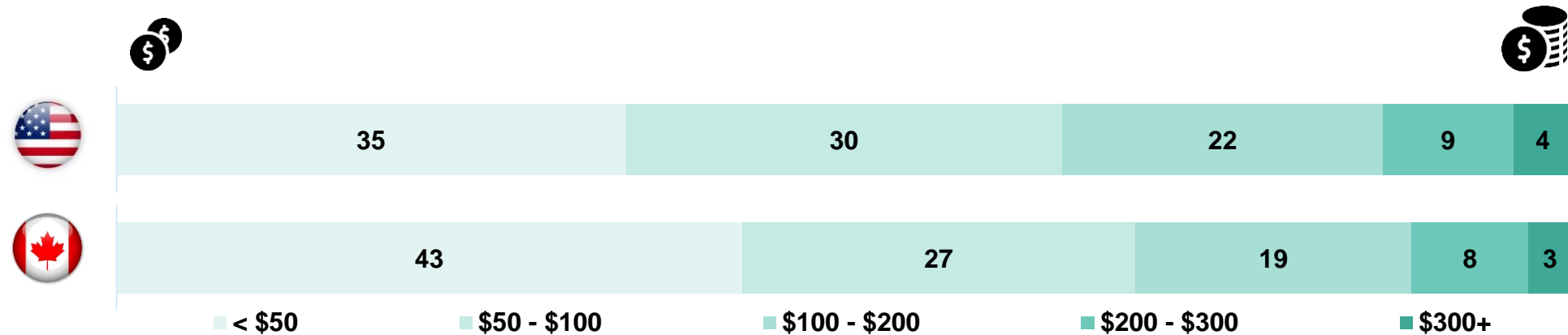
Consumer Behaviors

Most US and Canadian consumers are buying substantial amounts of dried cannabis and spending over \$50 per month on use

(IF CONSUMER) How much dried and cured cannabis do you typically buy in one month?













(IF CONSUMER) How much do you spend monthly on cannabis and cannabis-related products?



US consumers are 10% more likely and Canadian consumers are 5% more likely to **spend at least \$50 on cannabis** per month than in February

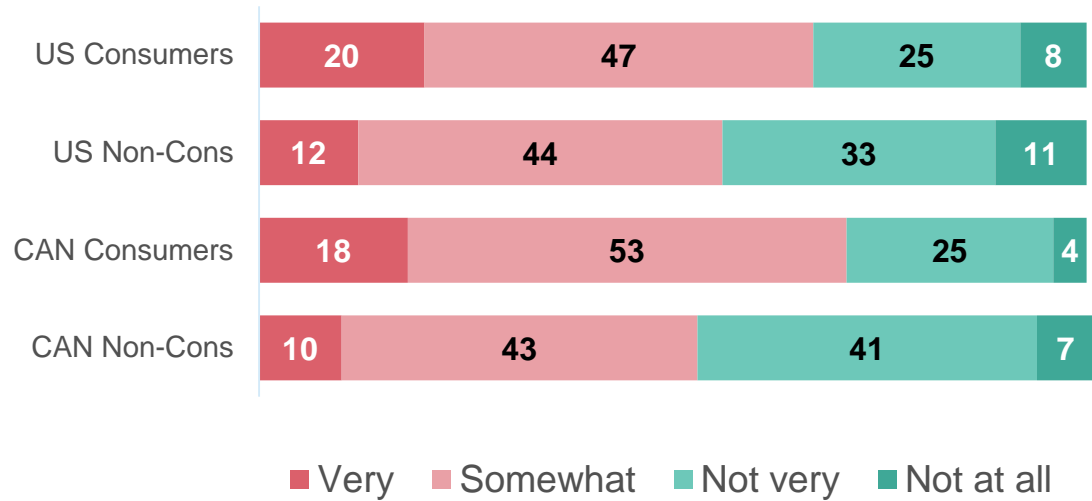
Consumer Behaviors

Most consumers in both countries prefer the traditional joint or blunt, but less popular topical creams are an intriguing alternative

	What methods of consuming cannabis have you tried?		What is your preferred method of consuming cannabis?		What method that you have not tried would you be interested in trying in the future?	
	US	CAN	US	CAN	US	CAN
Vaporizer 	30	39	12	18	28	19
Joint / Blunt 	74	82	45	53	5	3
Pipe 	59	55	31	16	11	7
Infused food or beverage 	38	43	11	15	23	23
Oil / Tincture / Capsule 	24	33	9	9	25	21
Topical Cream 	11	9	6	4	32	30
Bong 	49	47	16	14	9	9
Homemade device (apple, water bottle, etc.) 	28	24	4	2	9	10
Dabs / Shatter / Wax 	25	21	8	5	16	15
Other 	2	0	1	0	1	2
<i>(Only asked for "trying in the future") None of these:</i>					18	22

Cannabis consumers report having higher stress levels and rely on cannabis to deal with the stress in their life

How stressful is your life?



7 in 10 American and Canadian consumers say that anxiety and stress levels improve after using cannabis

How do you deal with the stress in your life?

	US Cons	US Non-Cons	CAN Cons	CAN Non-Cons
Relaxing or meditating	53	53	51	54
Talking to someone	51	43	49	44
Consuming cannabis	45	1	58	0
Exercising	41	41	51	44
Sleeping more	36	29	40	35
Consuming tobacco	29	11	28	10
Consuming alcohol	26	13	28	13
Taking a vacation	24	26	26	30
Writing in a journal	11	7	13	7
Other	6	12	5	9

Economic Potential



Most American non-consumers think cannabis has had a positive impact on the economy; Canadian non-consumers don't necessarily agree

Thinking about (states / places) where cannabis has been legalized in some way, what effect do you think cannabis legalization has had on the economies of those (states / places)?

	US GP	US Cons	US Non-Cons	CAN GP	CAN Cons	CAN Non-Cons
Very positive impact	35	66	28	19	45	8
Somewhat positive impact	34	29	35	38	43	36
TOTAL POSITIVE IMPACT	69	95	63	57	88	44
No impact	17	4	21	23	9	28
Somewhat negative impact	8	0	10	13	2	18
Very negative impact	5	1	7	7	1	10
TOTAL NEGATIVE IMPACT	13	1	17	20	3	28

Economic Potential

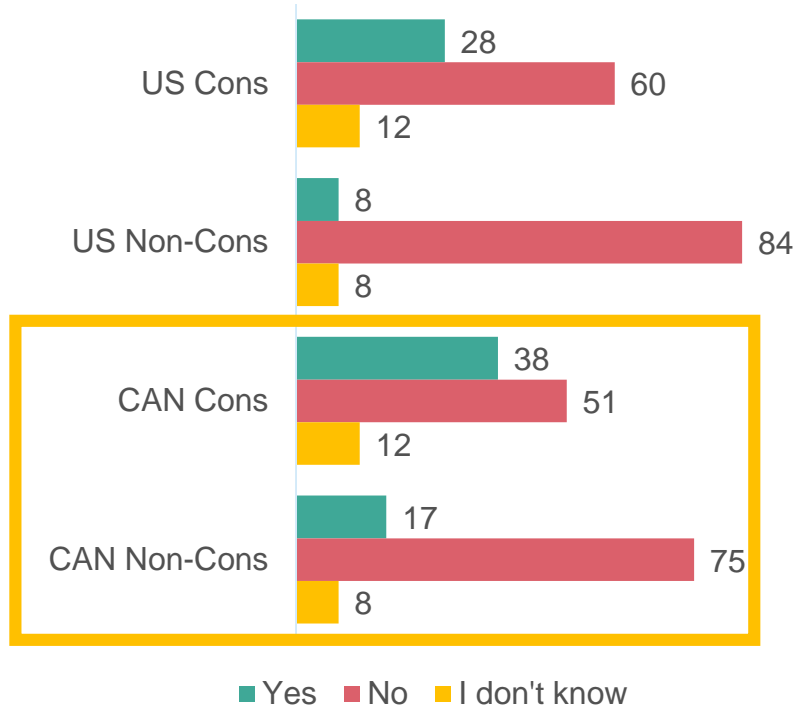
Even those who think cannabis is illegal in their state think it would benefit the local economy if it were legalized

(IF US, DO NOT THINK LEGAL IN STATE) If cannabis were legal in your state, what kind of impact would it have on your state's economy?

	US GP	US Cons	US Non-Cons
Very positive impact	27	72	21
Somewhat positive impact	34	22	35
TOTAL POSITIVE IMPACT	61	94	56
No impact	21	6	23
Somewhat negative impact	11	0	12
Very negative impact	8	0	9
TOTAL NEGATIVE IMPACT	19	0	21

Canadians are much more aware of a variety of cannabis brands, likely due to more flexible laws and accepting culture

Are you aware of any cannabis-related companies or brands?



(IF AWARE OF BRANDS) What cannabis-related companies or brands are you aware of?
(Showing a sampling of responses)



- Northern Lights Cannabis Co.
- Canopy Growth
- Hempz
- Native Roots
- Lazarus
- Aurora
- High Times
- Cannabox
- CanniMed

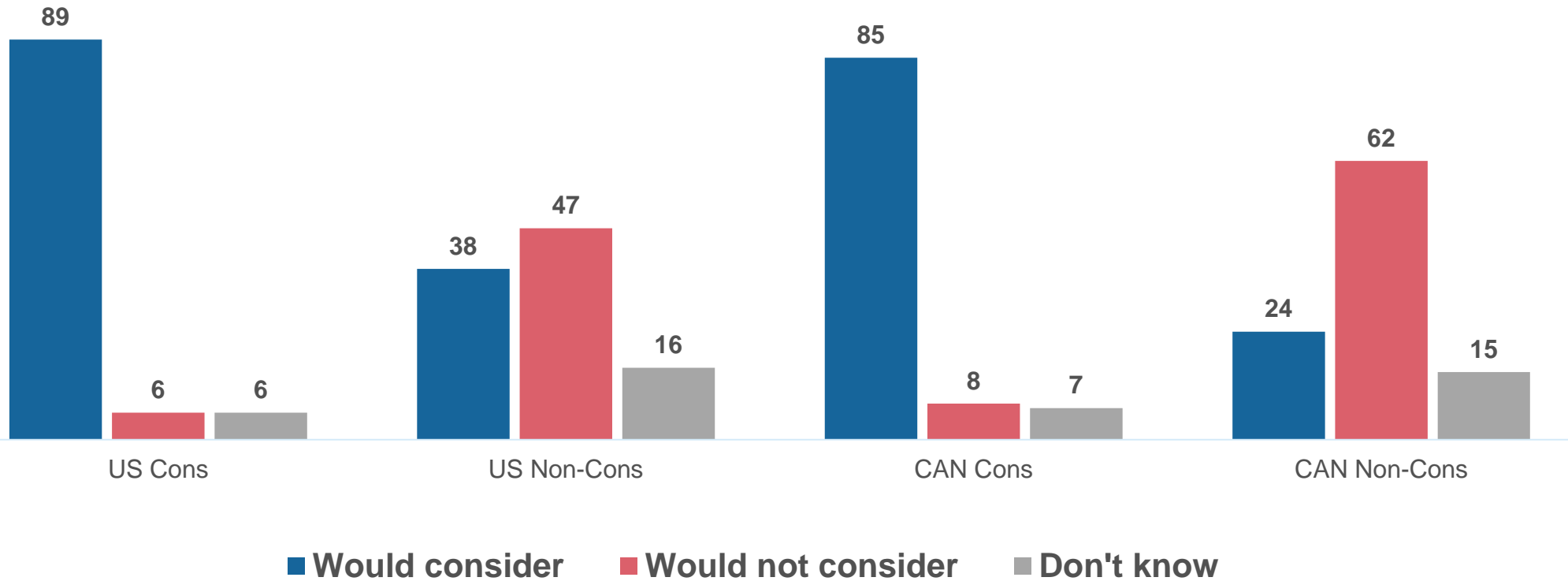


- Canopy Growth
- Aurora
- CannTrust
- Cannabud
- Organagram
- Budderweeds
- MedReleaf
- Aphria
- High Times
- MJ Express

Economic Potential

Two in five US non-consumers would consider spending money with a cannabis business; their Canadian counterparts are slightly less likely

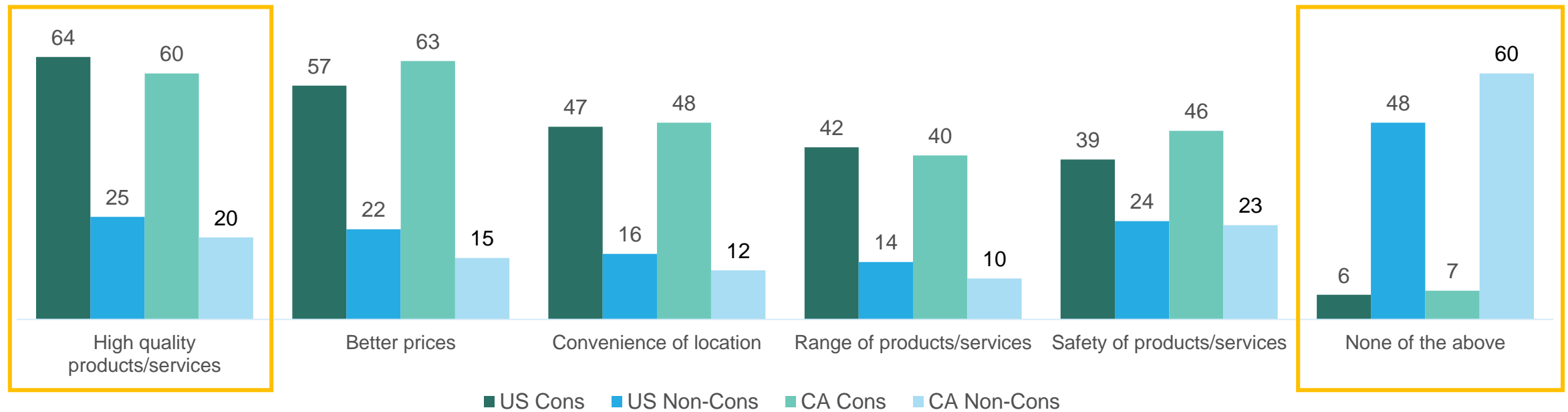
If you were living in a place where cannabis is legal, would you consider spending money with a cannabis-related business?



Cannabis consumers are looking for high quality and good prices from cannabis businesses; non-consumers are less compelled by a particular factor

What aspects of a cannabis business or brand might make you more likely to spend money with them?

Showing top 5 + None of the above



Thinking Ahead



Thinking Ahead

While non-consumers would like to see health regulations for medical cannabis, consumers are more interested in research on its effects

Initiatives (Ranked by US GP)	US GP	US Cons	US Non-Cons	CAN GP	CAN Cons	CAN Non-Cons
	More favorable	More favorable	More favorable	More favorable	More favorable	More favorable
Partner with national health organizations to develop medical standards and regulations for cannabis	55	68	52	55	67	52
Increase industry funding for research on cannabis' effects from both medical and recreational use	54	73	49	51	72	43
Develop public education campaigns to support only responsible legal use of cannabis and its derivatives	51	70	47	50	63	46
Develop official guidelines/handbooks for responsible marketing of cannabis to avoid underage use	51	66	47	53	65	48
Require cannabis businesses to report yearly data surrounding safety practices, sales, marketing, etc. to the public and the government	50	63	46	49	62	44
Encourage cannabis businesses to pledge a certain percentage of profits to environmental conservation	49	71	44	46	66	38
Institute a system of quality ratings or designations for cannabis products (such as letter grades, official labels/symbols, etc.)	49	75	42	46	71	37
Establish organizations that allow cannabis businesses and experts to collaborate on best practices in the industry	48	73	41	42	64	33
Develop guidelines for corporate social responsibility of cannabis businesses at a national and local level	48	67	44	47	62	41
Aggregate industry-wide data and updates into reports for public use	45	65	40	39	54	33
Develop international accreditation standards for cannabis businesses and their partners	45	64	41	42	64	33
Limit advertisement of cannabis-related products to certain types of imagery, promotion, and media outlets, similar to tobacco in the US and Canada	41	55	38	45	52	44