

Canadian Cannabis Consumption

With Declared Data

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What do we have on consumer engagement with Cannabis?

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Insights

What does the declared data reveal?

Legalization had little impact on attracting new cannabis users

Cannabis usage decreases consumption of medication, alcohol, and tobacco

Users continue to explore the various ways of consuming cannabis regardless of when certain product types are legalized

Non-users would consider cannabis for health and medical benefits

Cannabis users still purchase from black market sources; illicit options are perceived to provide more value over their legal counterparts

Tobacco consumption is becoming less socially acceptable amongst cannabis users and non-users

Further public education is required to assist non-users in understanding the effects of cannabis

Non-users will react negatively to brands launching cannabis related products

Observations

Cannabis Usage

- 19% of Canadians have consumed cannabis within the past year, a small increase in size of the same type of consumers from before legalization.
- 41% of Canadians who have used Cannabis within the past year consumed for medical purposes
- Those who use cannabis for medical purposes have had a positive experience from recreational use and prefer natural and safe products for treatment.
- Usage stayed the same for 70% of cannabis users post legalization; aligning with usage predictions made pre-legalization.
- Cannabis legalization increased usage for 9% of cannabis users.
- 9% of users had their first cannabis experience after legalization.
- 71% of non-users are unlikely to use cannabis; aligning with pre-legalization predictions.
- Cannabis usage increased the consumption of salty snacks, chocolate/candy, fast food, and pop/soda and decreased consumption of medication (pain, other), alcohol, and cigarettes.
- Majority of users continue to support the legalization of cannabis. Some non-users shifted their perception on legalization to undecided.
- Consumption of edible cannabis became very popular after initial legalization, which is a surprise as that specific type of product did not become officially legal until mid-October of 2019.

Observations

Motivations to use and purchasing of cannabis

- Canadians use cannabis to relax and unwind. Non-users would consider taking cannabis mainly for health or medical benefits.
- 55% of non-users are not interested in cannabis.
- While 53% of users obtain cannabis through legal channels, 38% purchase from black market sources.
- Illicit cannabis sources are perceived to provide affordable, efficient, and trust over their legal counterparts.

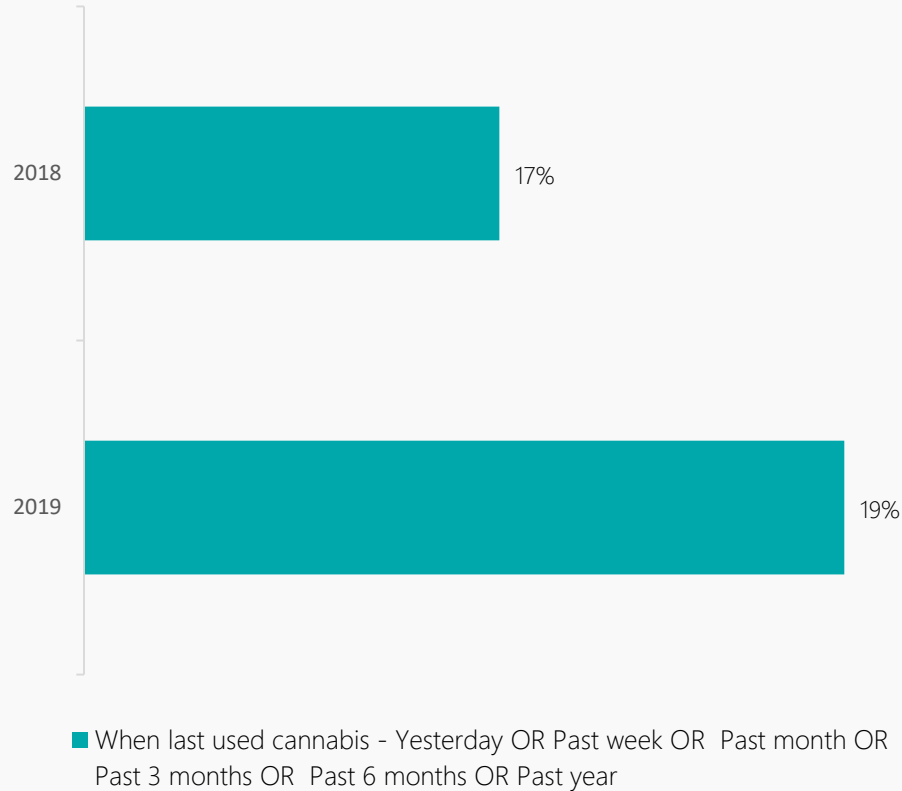
Observations

Social acceptability, public education, and attitudes towards cannabis

- Canadian users continue to find cannabis consumption to be socially acceptable while non-users are becoming undecided about the topic. Tobacco consumption is becoming less acceptable for cannabis users and non-users.
- Canadians assume it is the responsibility of health care professionals, the government, and schools to educate the public on the effects of cannabis. Cannabis users see cannabis producers and retailers to also be responsible for proper cannabis education.
- Canadians look to digital channels and WOM for information on Cannabis. Non-users are more inclined to obtain information on cannabis through traditional media channels as well as government websites.
- Over a third of Cannabis users and non-users see advertising as a good source for information but are not easily influenced by ads to make a purchase decision.
- Canadians are concerned about data protection and online privacy. They do not trust that government will provide the proper privacy protections.
- Canadians are focused on the health benefits of cannabis and identify the importance of educating the public on the effects of using.
- Non-users are concerned about mixing cannabis with other consumables, the negative impact on health, advertising regulations. They also consider cannabis to still be a gateway drug.
- Perceptions will not drastically change for Canadians when it comes to brands launching a cannabis product. However, the majority Cannabis users would see health and wellness brands launching cannabis products in a positive manner. Non-users would react negatively to any brand who launches a cannabis product.
- Brands launching cannabis related products will not change usage amongst Canadians. However, new cannabis products will entice users to consume more but will potentially push non-users away from considering usage.

Usage

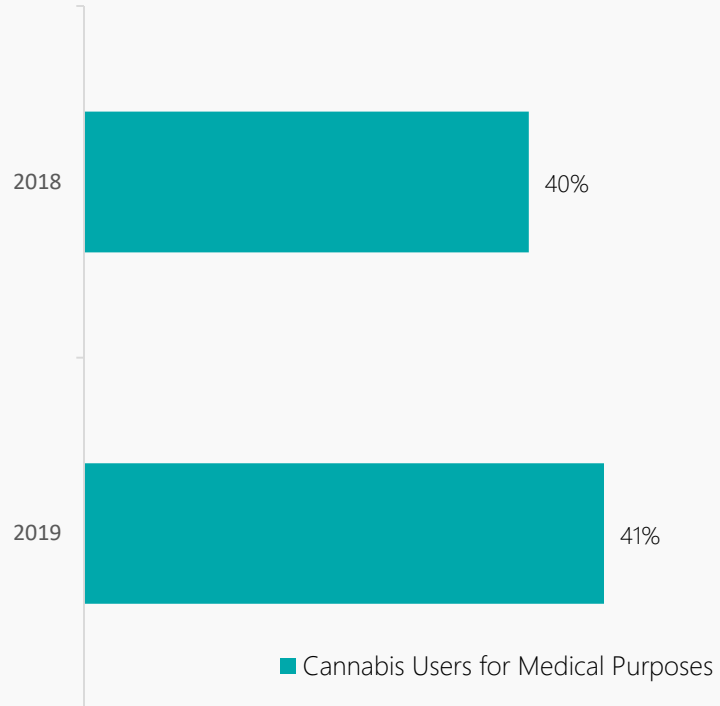
Did legalization change cannabis usage amongst Canadians?



19% of Canadians have consumed cannabis within the past year, a small increase in size of the same type of consumers from before legalization.

Usage

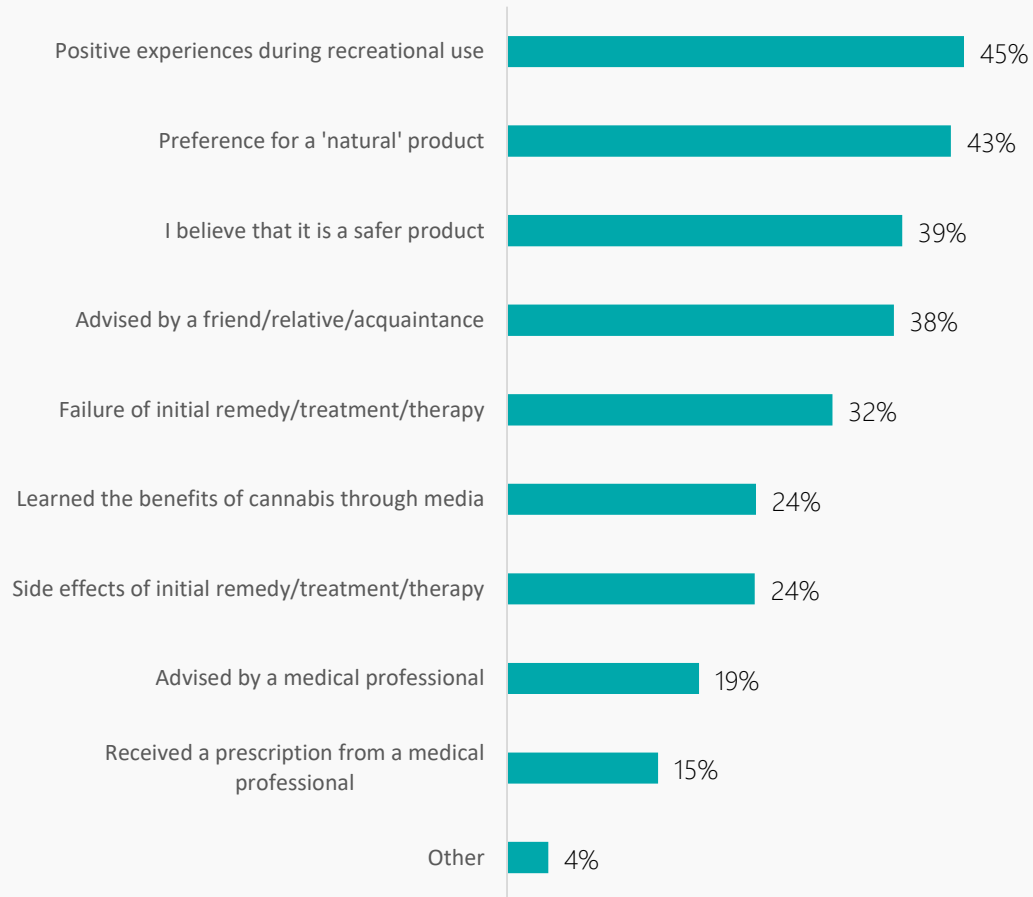
Did legalization change medical cannabis usage amongst Canadians?



41% of Canadians who have used Cannabis within the past year consumed for medical purposes

Usage

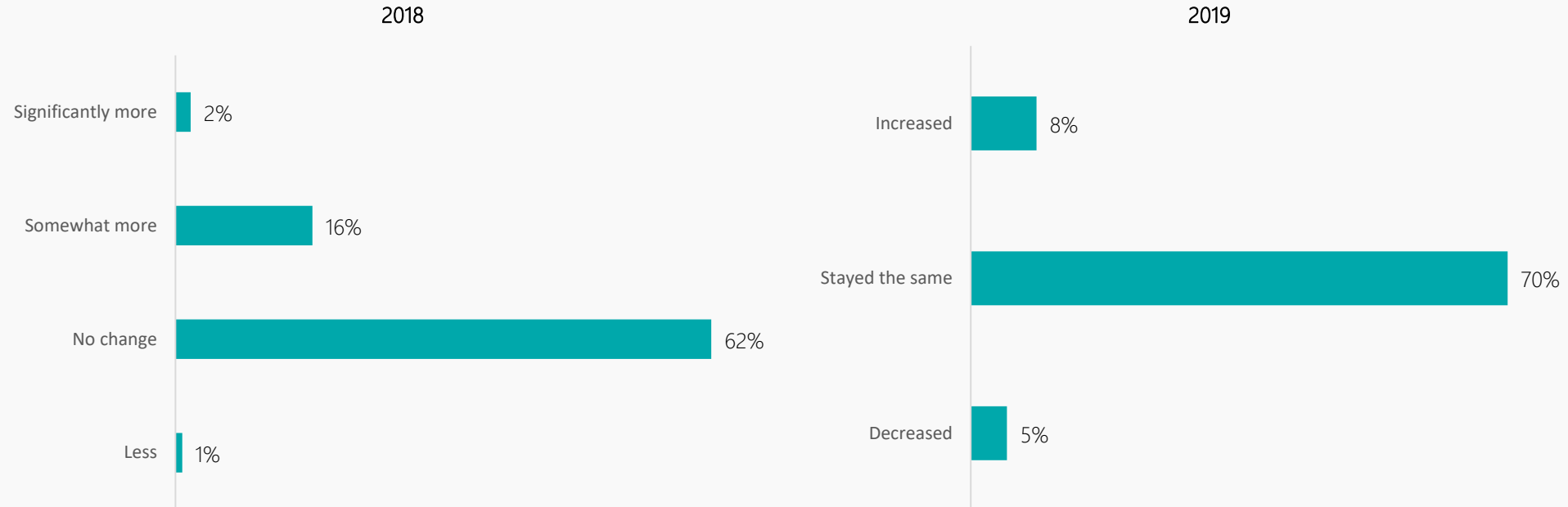
What prompted you to try cannabis as a form of remedy/treatment/therapy?



Those who use cannabis for medical purposes have had a positive experience from recreational use and prefer natural and safe products for treatment.

Usage

How did your use of cannabis change after legalization?



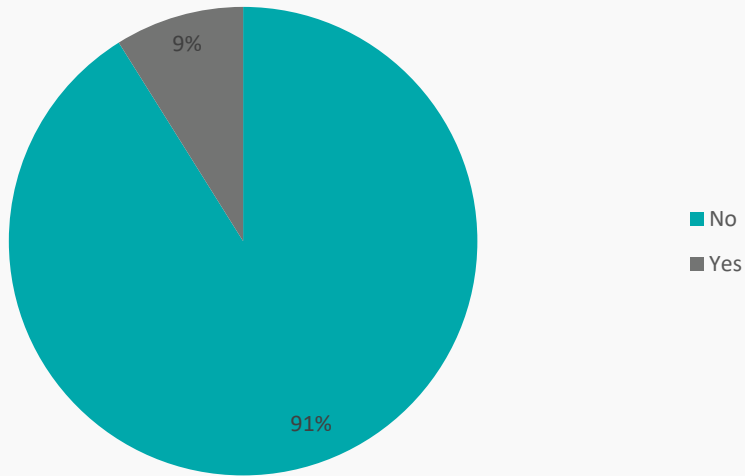
Usage stayed the same for 70% of cannabis users post legalization; aligning with usage predictions made pre-legalization.

Cannabis legalization increased usage for 9% of cannabis users.

Usage

Did legalization influence usage and consideration?

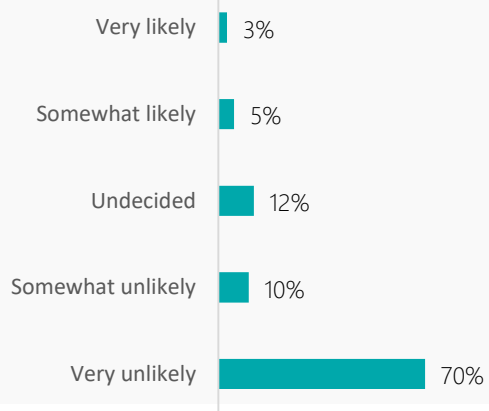
Did you first use cannabis post legalization?



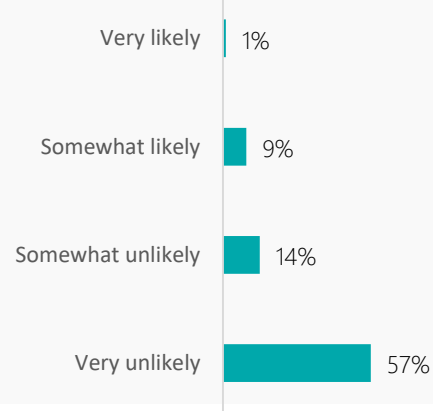
9% of users had their first cannabis experience after legalization.

71% of non-users are unlikely to use cannabis; aligning with pre-legalization predictions.

2018 - How likely are you to consume cannabis in the future?

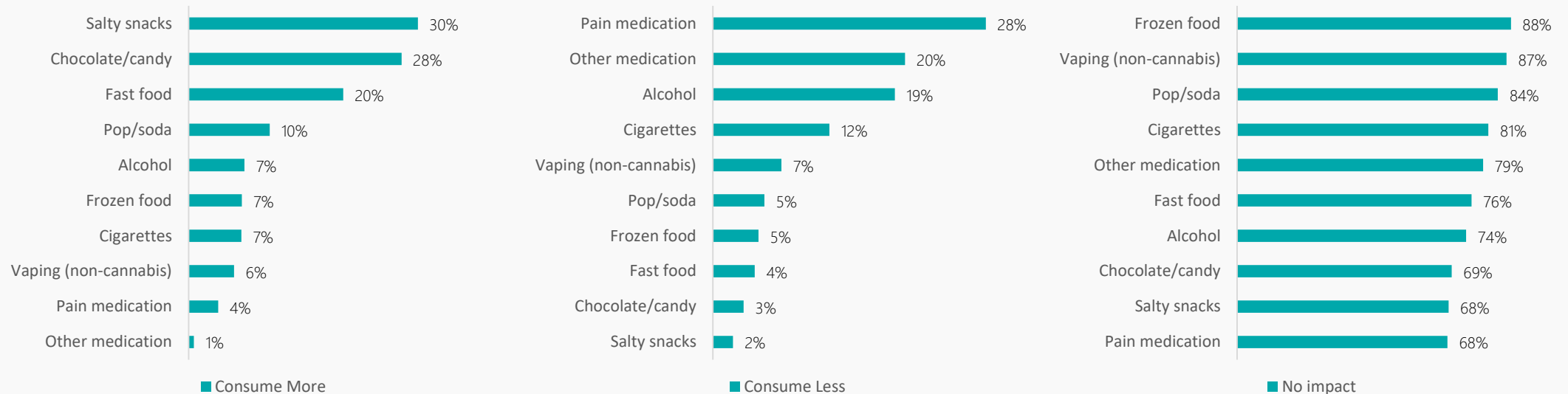


2019 - How likely are you to consume cannabis in the future?



Usage

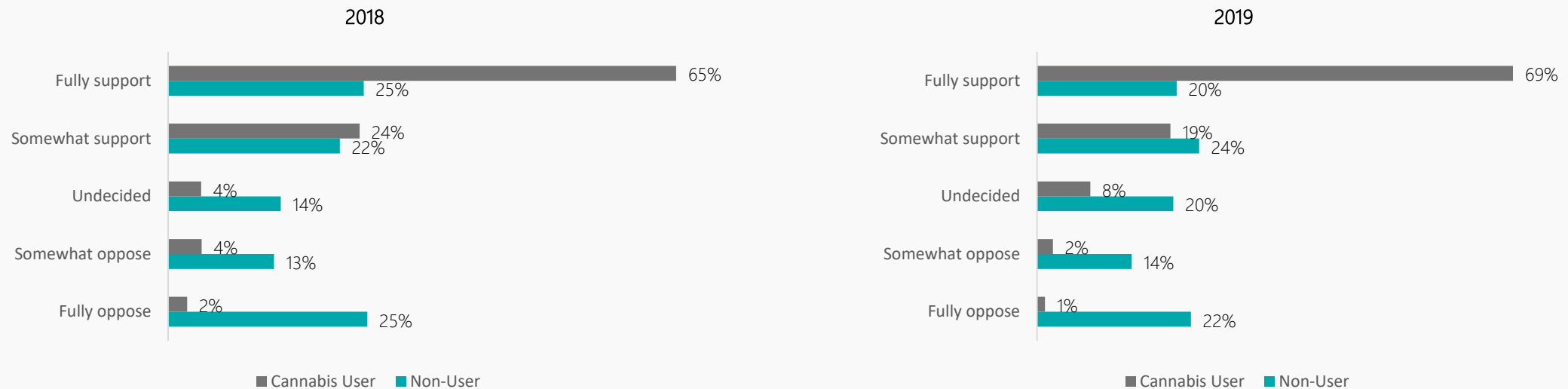
How has your use of cannabis impacted your consumption of the following products?



Cannabis usage increased the consumption of salty snacks, chocolate/candy, fast food, and pop/soda and decreased consumption of medication (pain, other), alcohol, and cigarettes.

Legalization and Consumption

Do you support or oppose cannabis legalization?

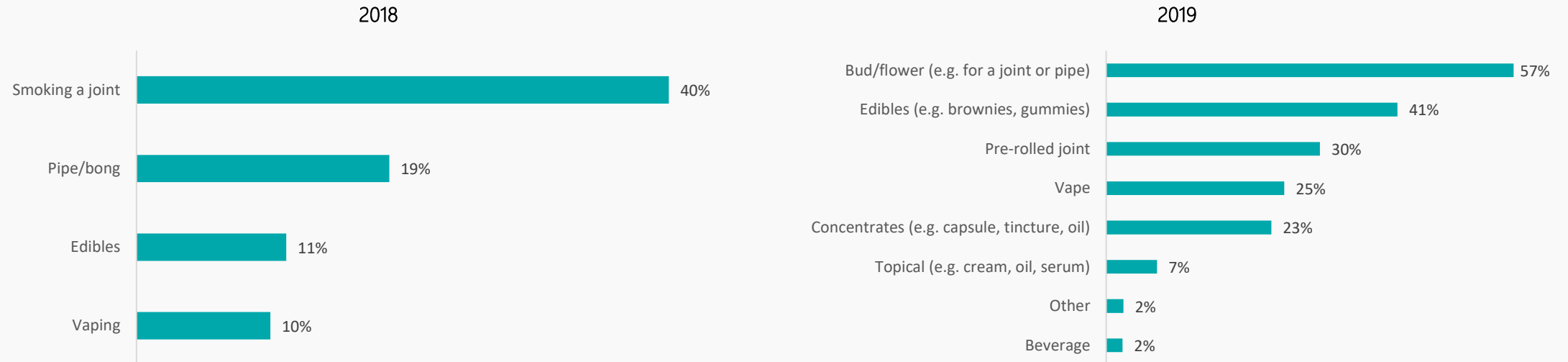


Majority of users continue to support the legalization of cannabis.

Some non-users shifted their perception on legalization to undecided.

Method of Consumption

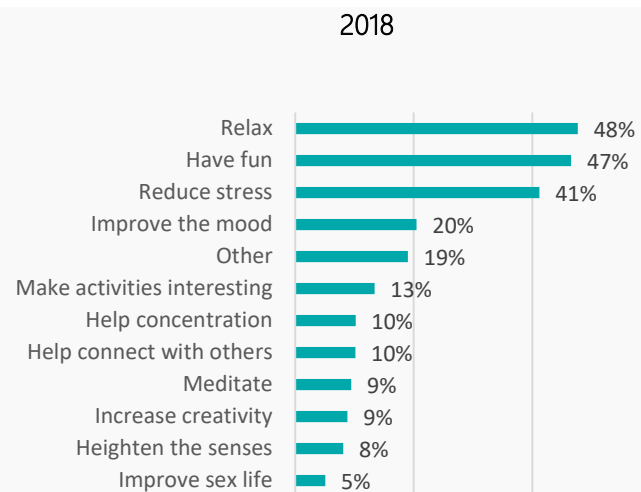
How do you consume cannabis?



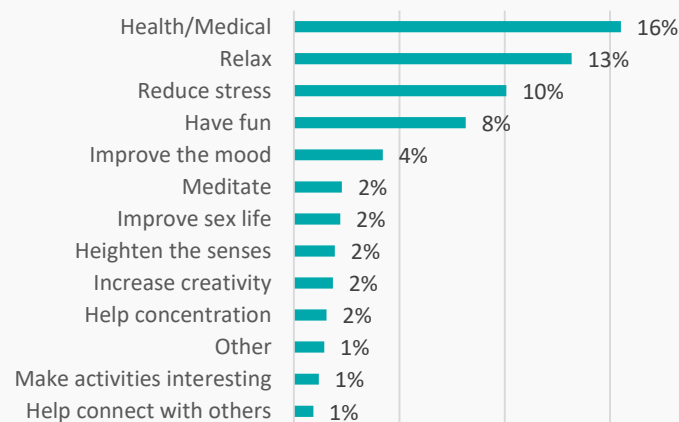
Consumption of edible cannabis became very popular after initial legalization, which is a surprise as that specific type of product did not become officially legal until mid-October of 2019.

Motivation to consume

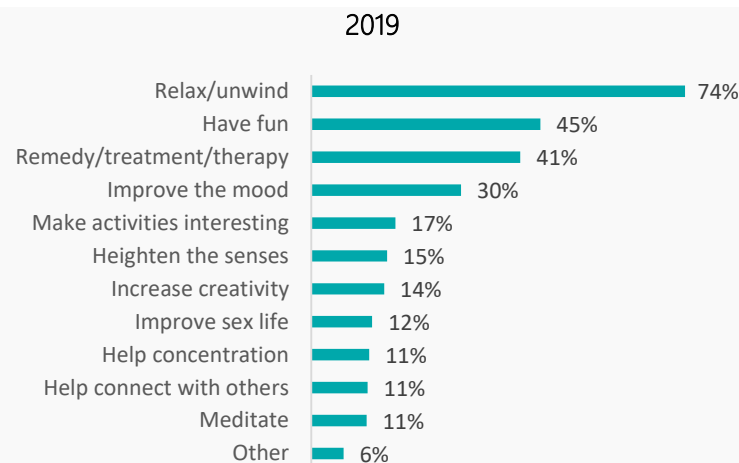
What has been your motivation to consume cannabis/marijuana?



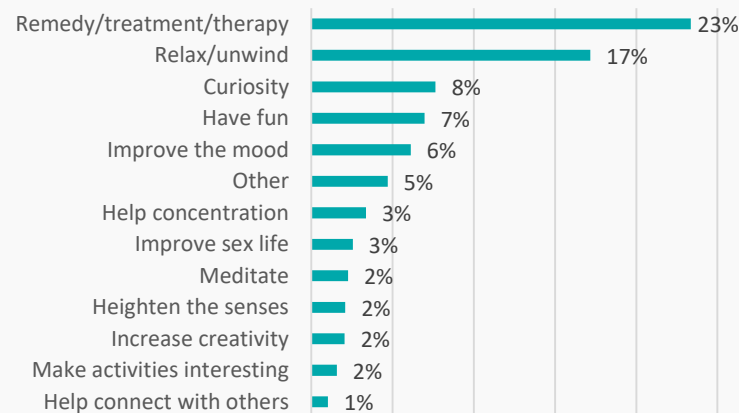
■ Cannabis User



■ Potential Users



■ Cannabis User



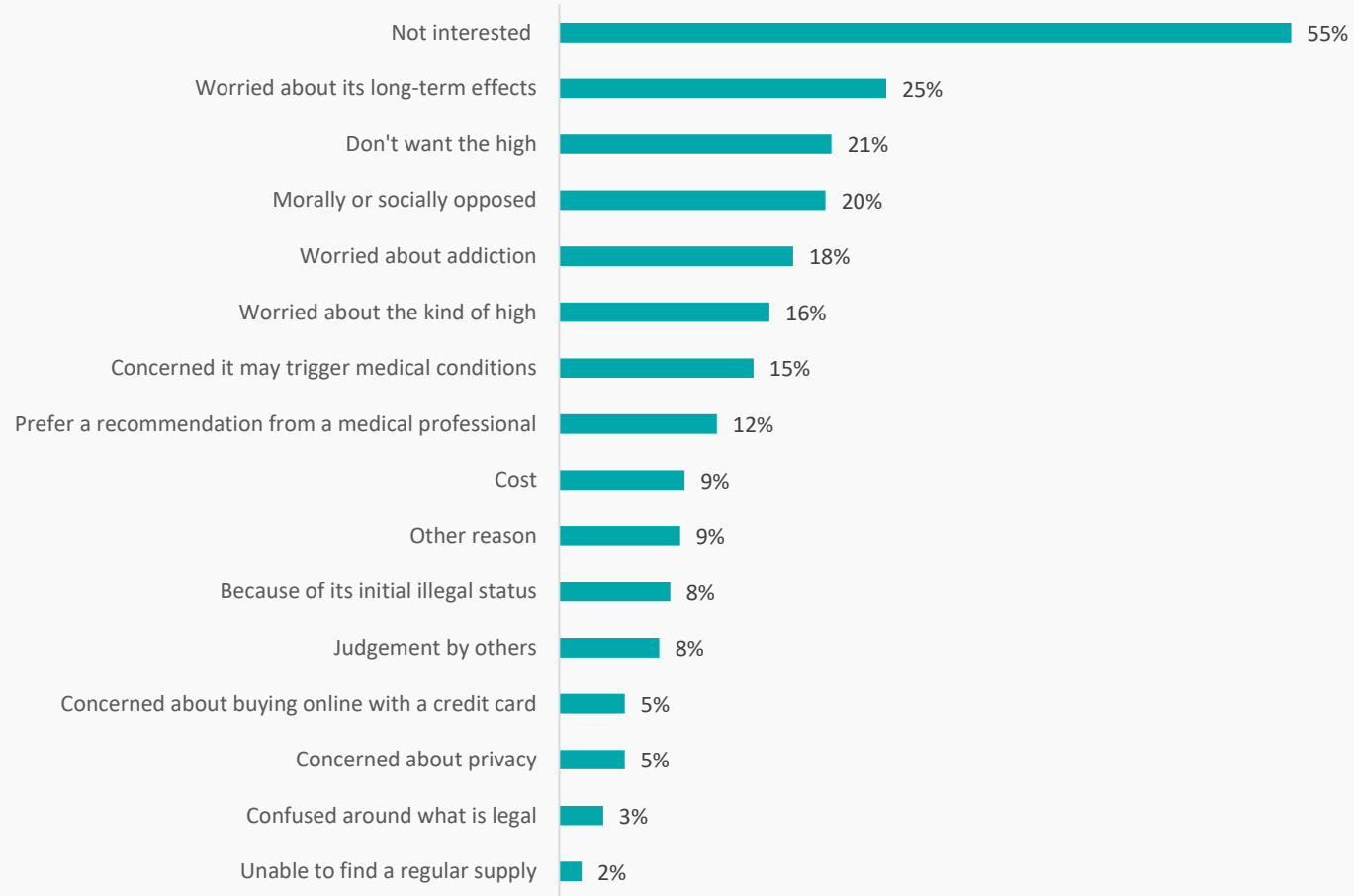
■ Potential Users

Canadians use cannabis to relax and unwind.

Non-users would consider taking cannabis mainly for health or medical benefits.

Motivation to consume

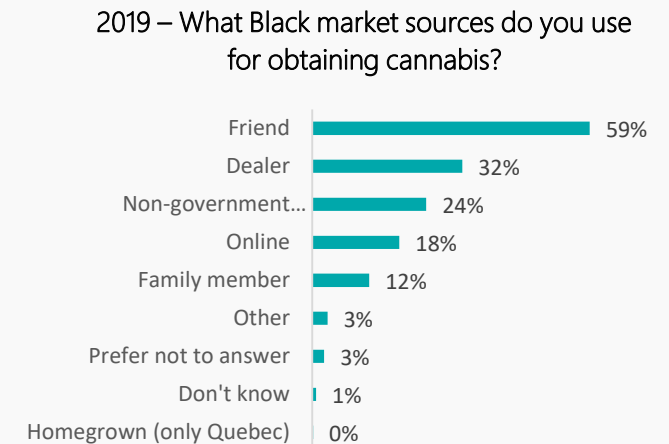
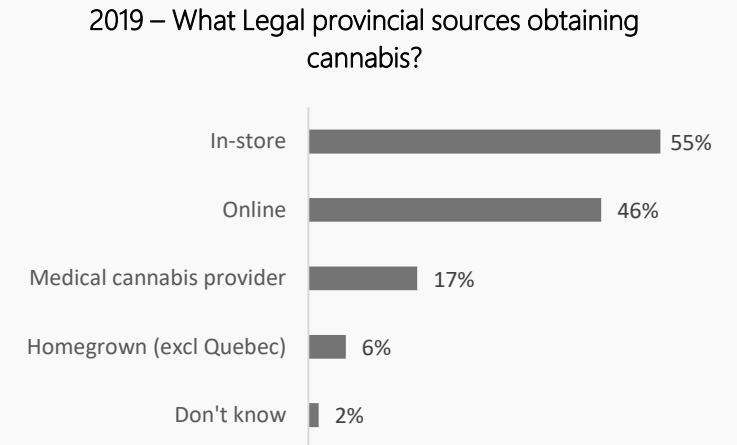
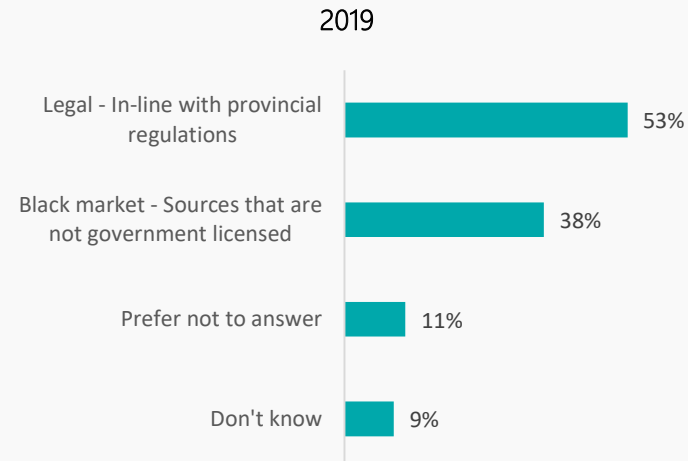
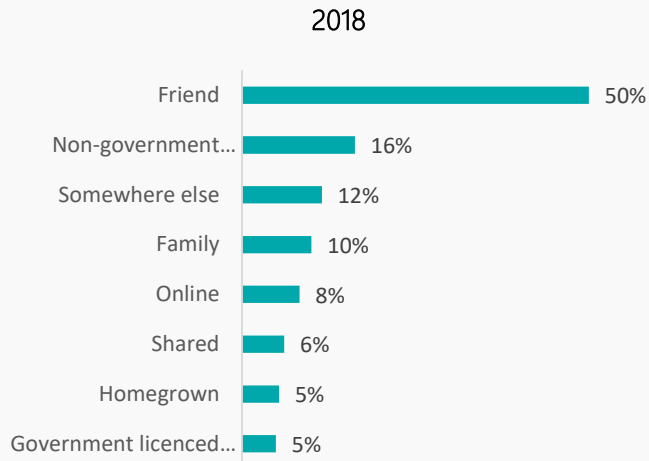
What has prevented you from using cannabis?



55% of non-users are simply not interested in cannabis.

How Obtained

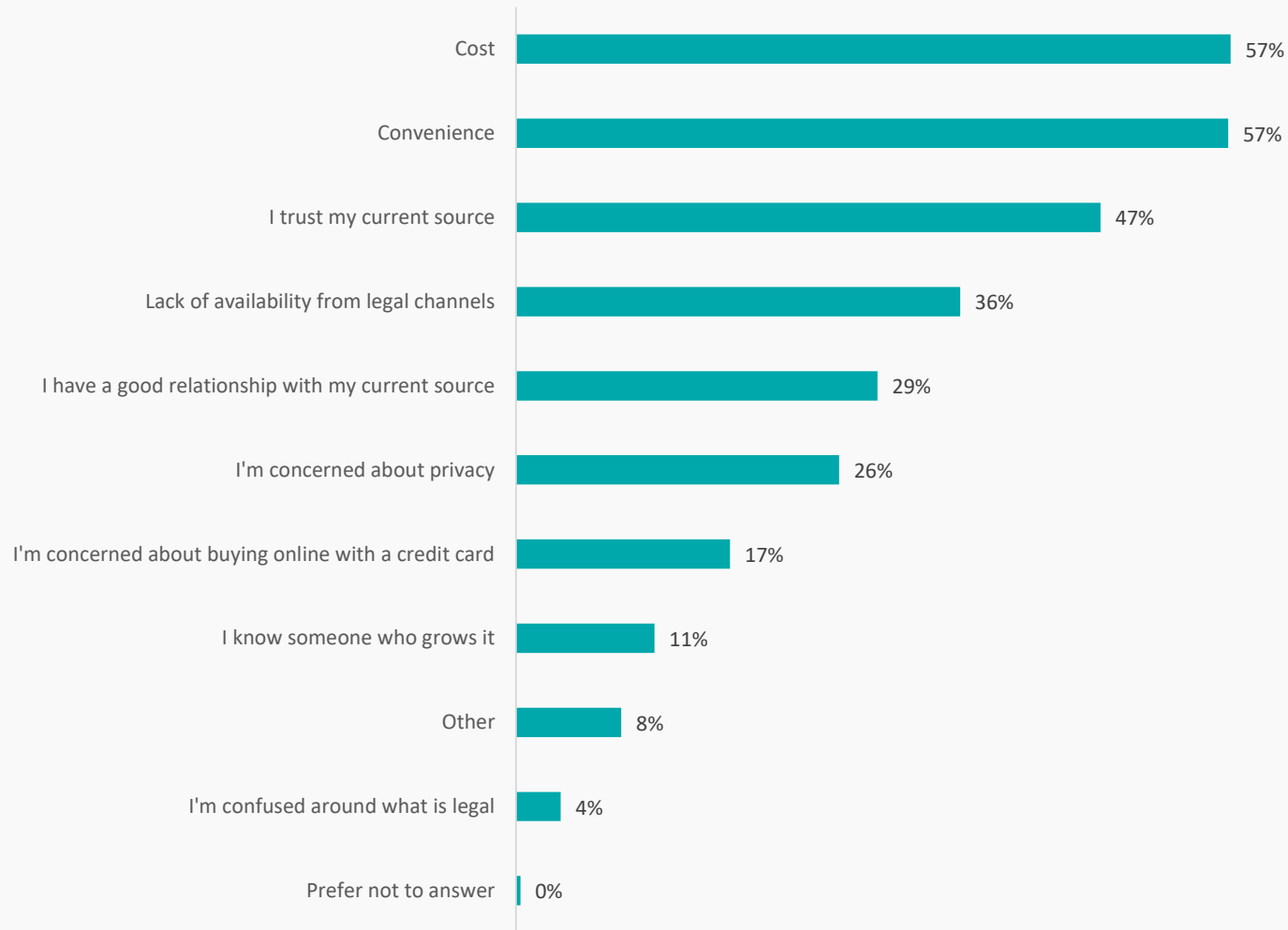
How do you, or someone else in your household, generally obtain cannabis?



While 53% of users obtain cannabis through legal channels, 38% purchase from black market sources.

How Obtained

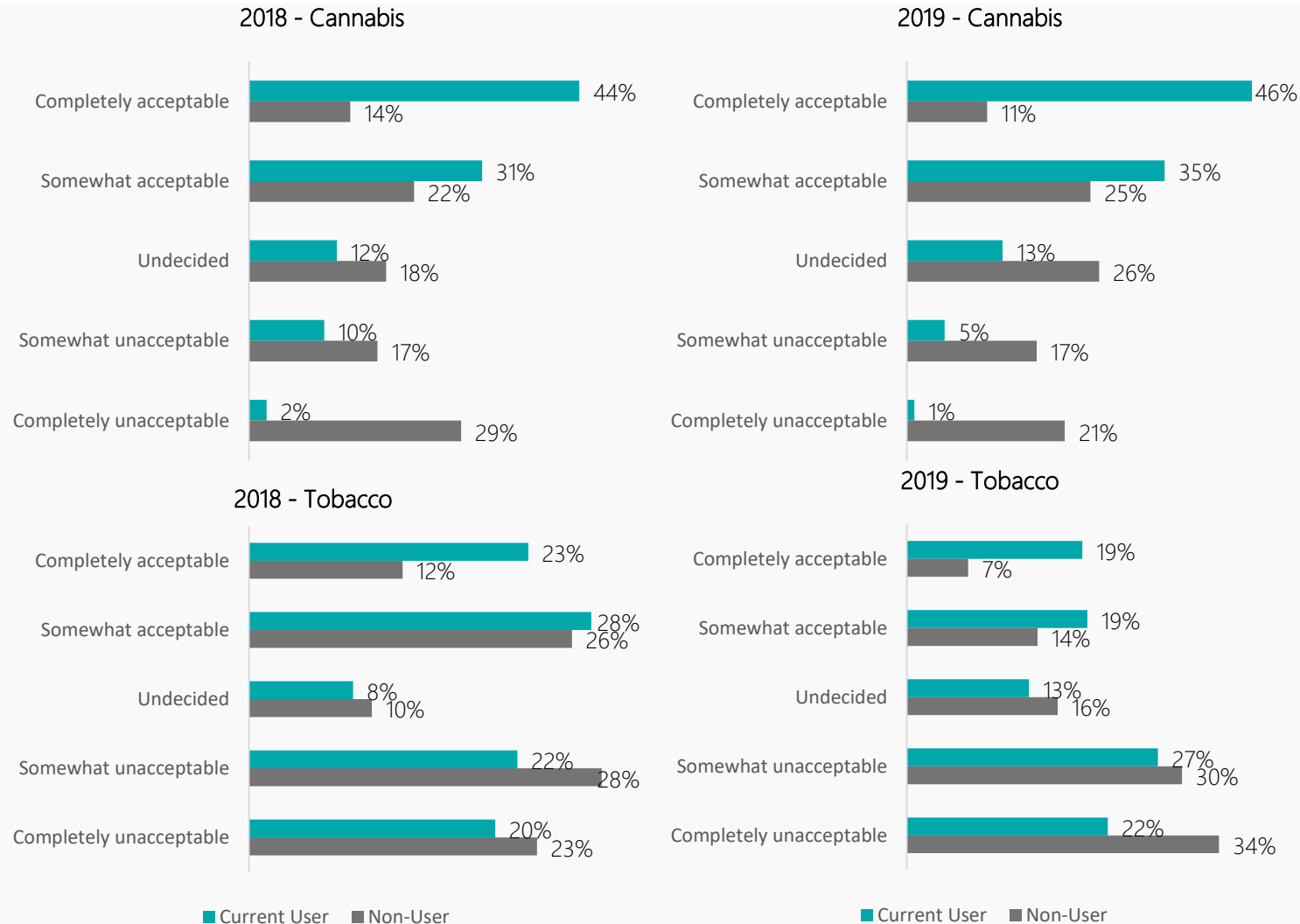
Why do you not purchase cannabis from legal sources?



Illicit cannabis sources are perceived to provide affordable, efficient, and trust over their legal counterparts.

Social Acceptability

What is your attitude on social acceptability of cannabis and tobacco consumption?

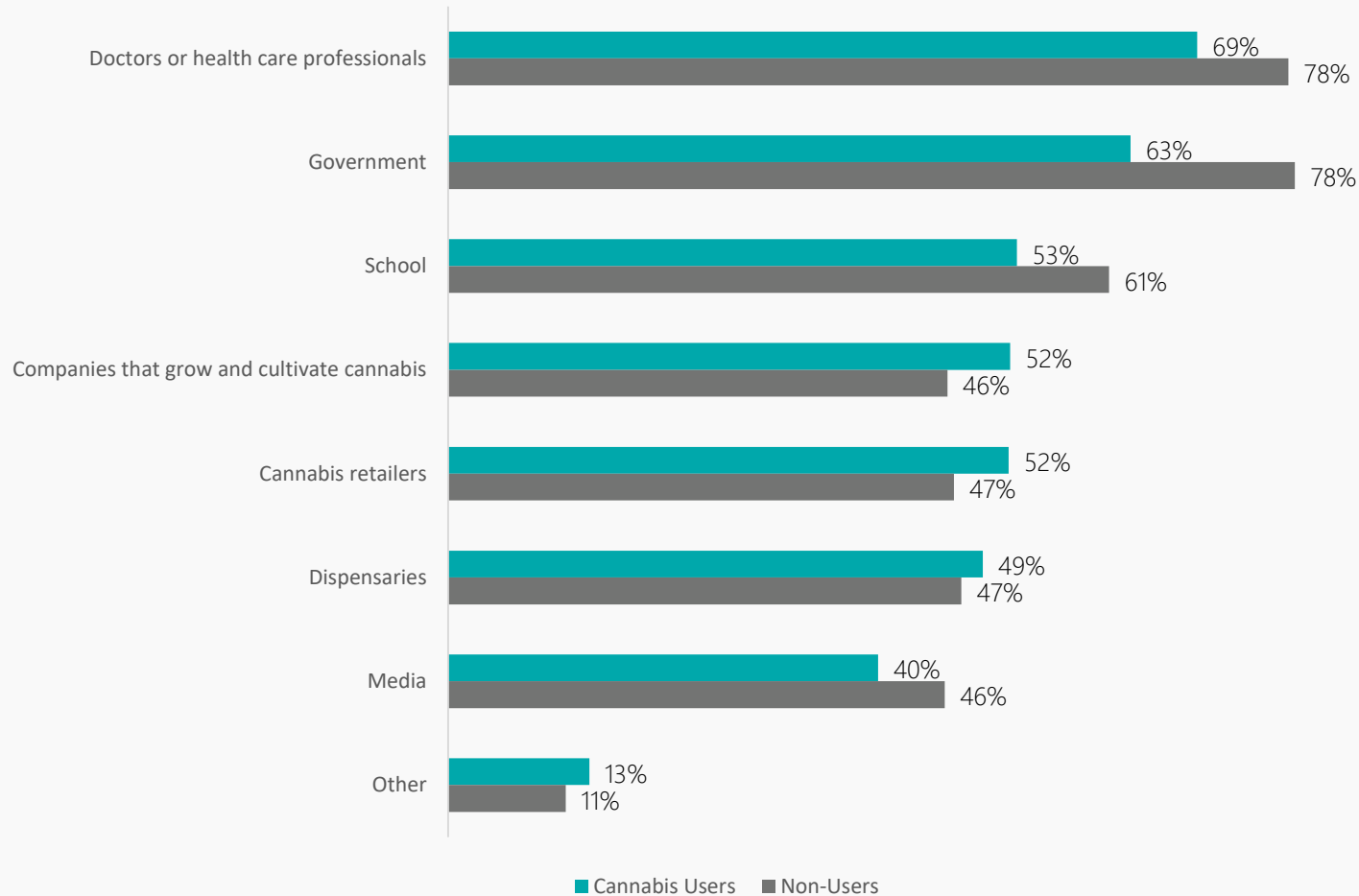


Canadian users continue to find cannabis consumption to be socially acceptable while non-users are becoming undecided about the topic.

Tobacco consumption is becoming less acceptable for cannabis users and non-users.

Public Education

In your opinion who is responsible for educating people about positive and negative effects of cannabis/marijuana consumption?



Canadians assume it is the responsibility of health care professionals, the government, and schools to educate the public on the effects of cannabis.

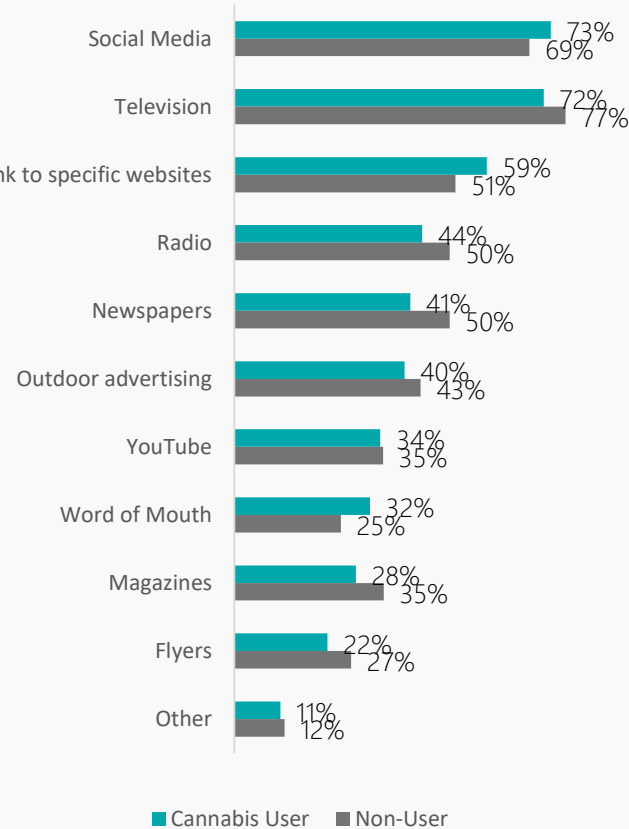
Cannabis users see cannabis producers and retailers to also be responsible for proper cannabis education.

Public Education

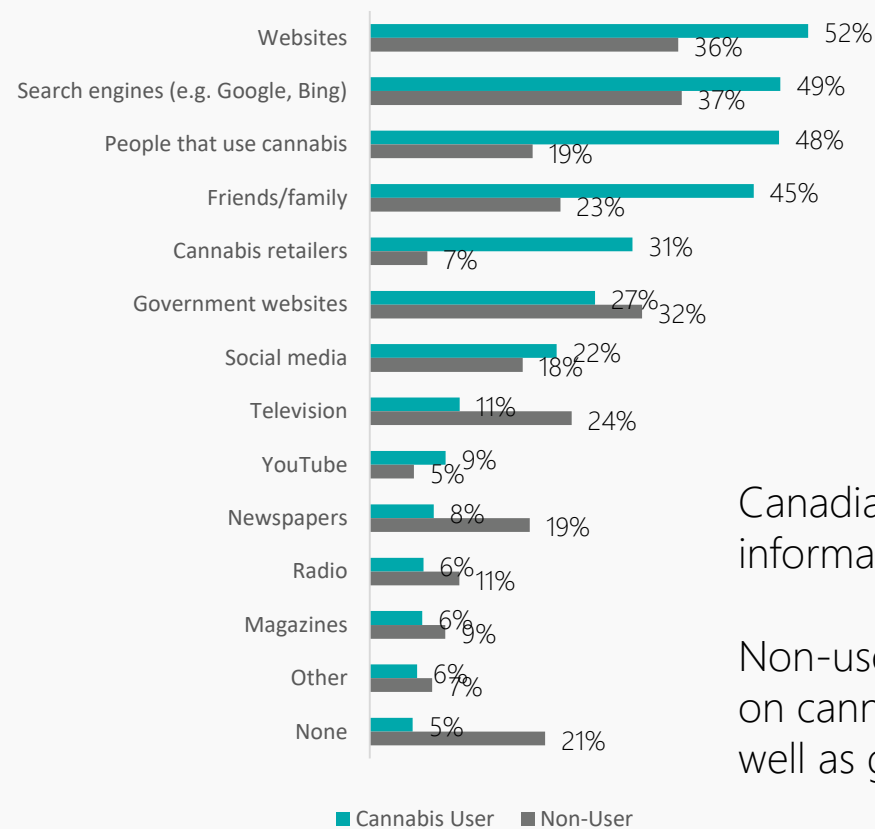
In your opinion which are the key media channels to be used in educating people about cannabis/marijuana?

Where do you go for information on cannabis?

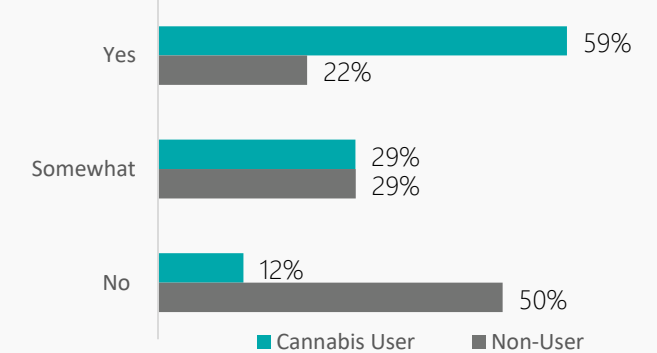
2018



2019



2019 - Do you understand the difference between THC and CBD?

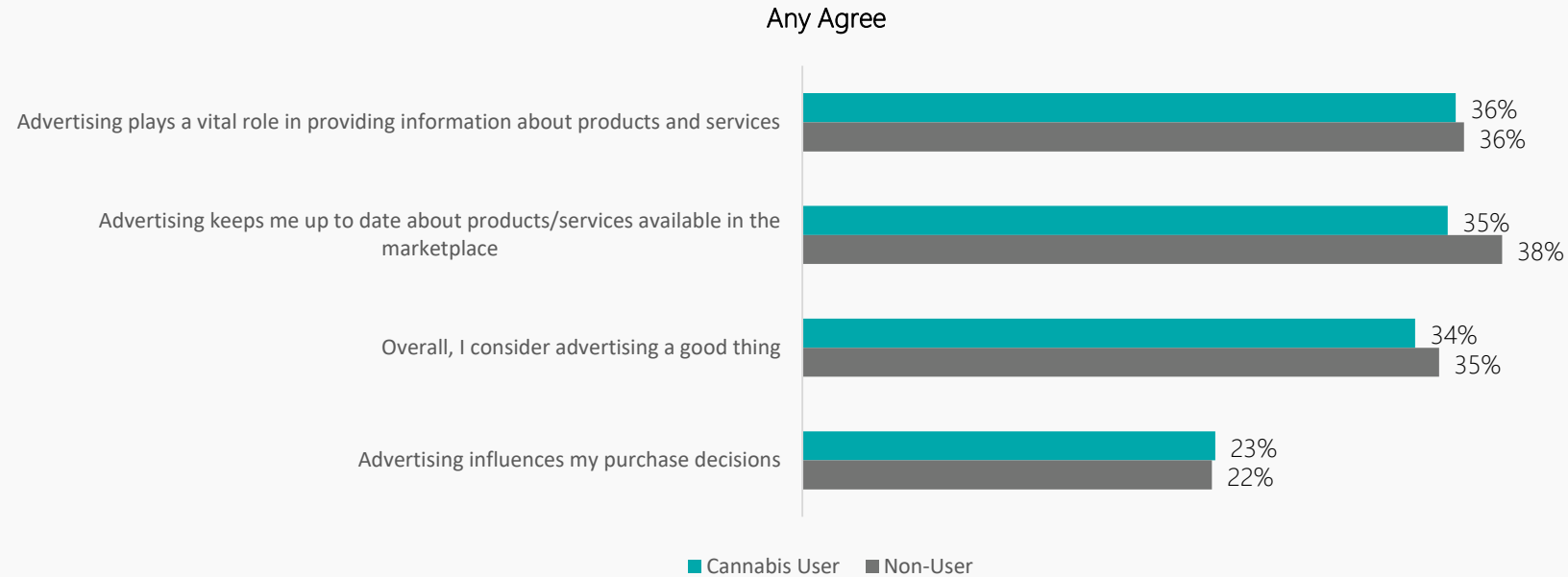


Canadians look to digital channels and WOM for information on Cannabis.

Non-users are more inclined to obtain information on cannabis through traditional media channels as well as government websites.

Attitudes

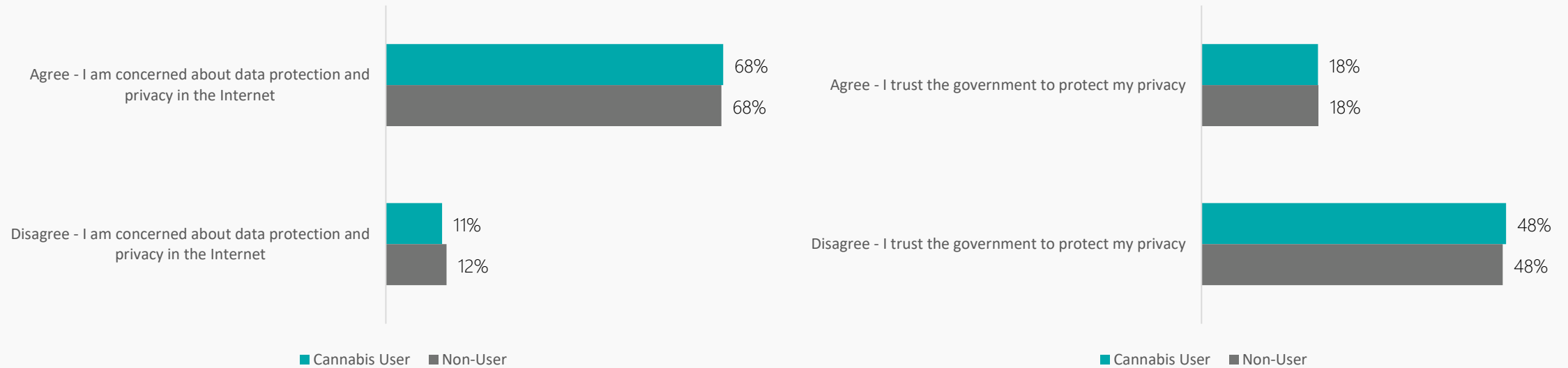
General Advertising



Over a third of Cannabis users and non-users see advertising as a good source for information but are not easily influenced by ads to make a purchase decision.

Attitudes

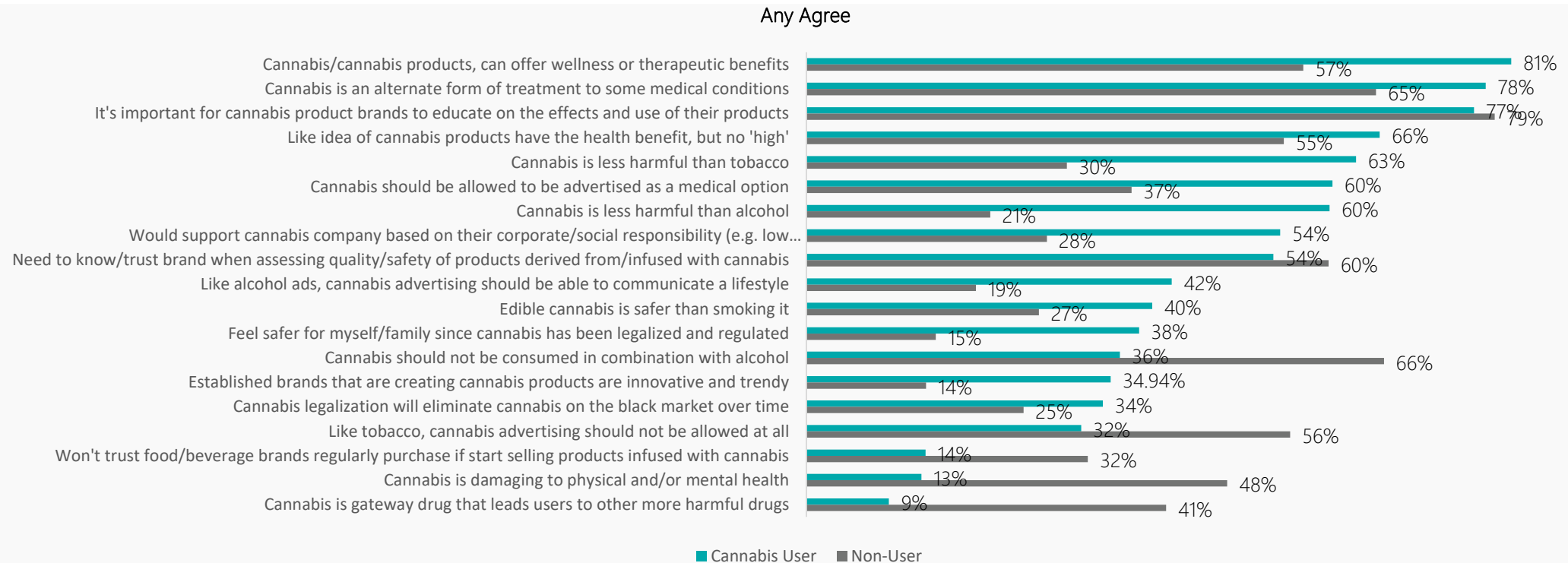
Data Privacy and Trust



Canadians are concerned about data protection and online privacy. They do not trust that government will provide the proper privacy protections.

Attitudes

All Statements

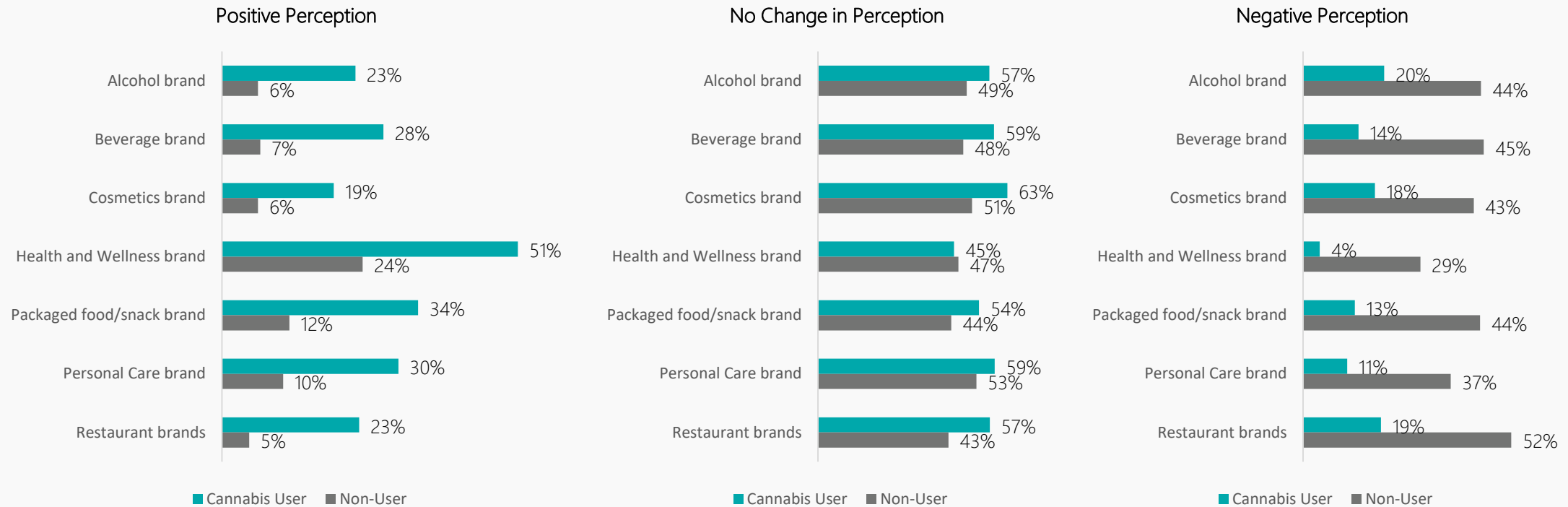


Canadians are focused on the health benefits of cannabis and identify the importance of educating the public on the effects of using.

Non-users are concerned about mixing cannabis with other consumables, the negative impact on health, advertising regulations. They also consider cannabis to still be a gateway drug.

Attitudes

How would you perceive a well-known brand if they launched a product containing cannabis?

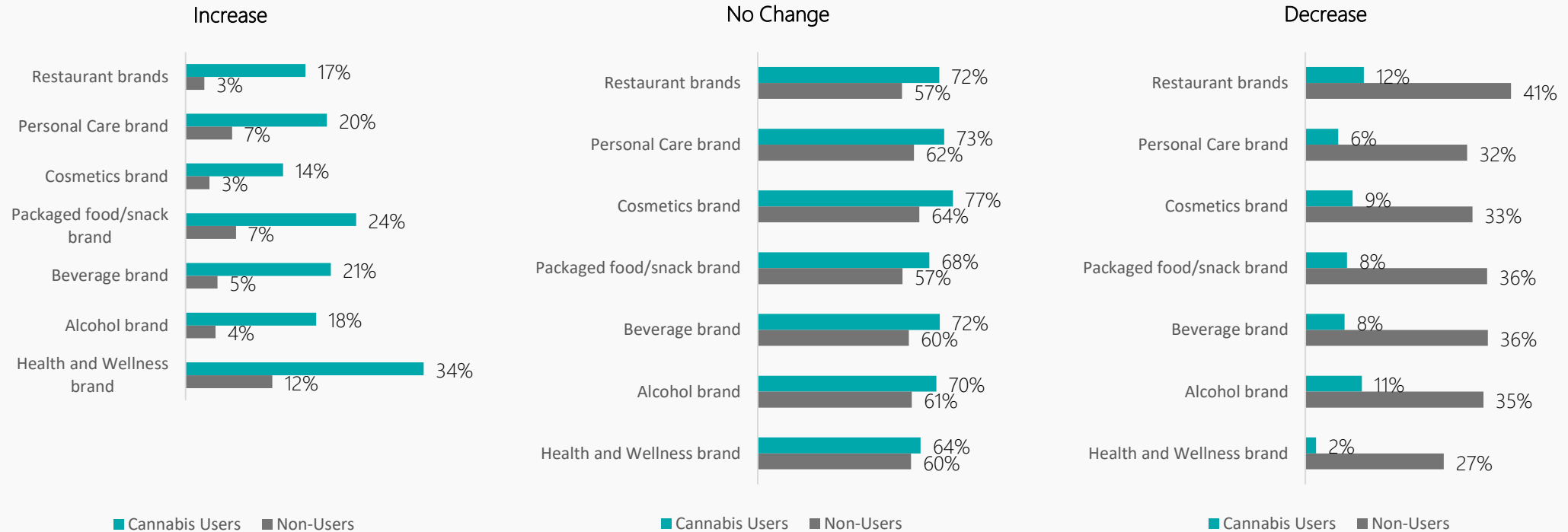


Perceptions will not drastically change for Canadians when it comes to brands launching a cannabis product.

However, the majority Cannabis users would see health and wellness brands launching cannabis products in a positive manner. Non-users would react negatively to any brand who launches a cannabis product.

Attitudes

How would your usage of a well-known brand change if that brand launched a product containing cannabis?



Brands launching cannabis related products will not change usage amongst Canadians. However, new products will entice cannabis users to consume more but will potentially push non-users away from considering usage.

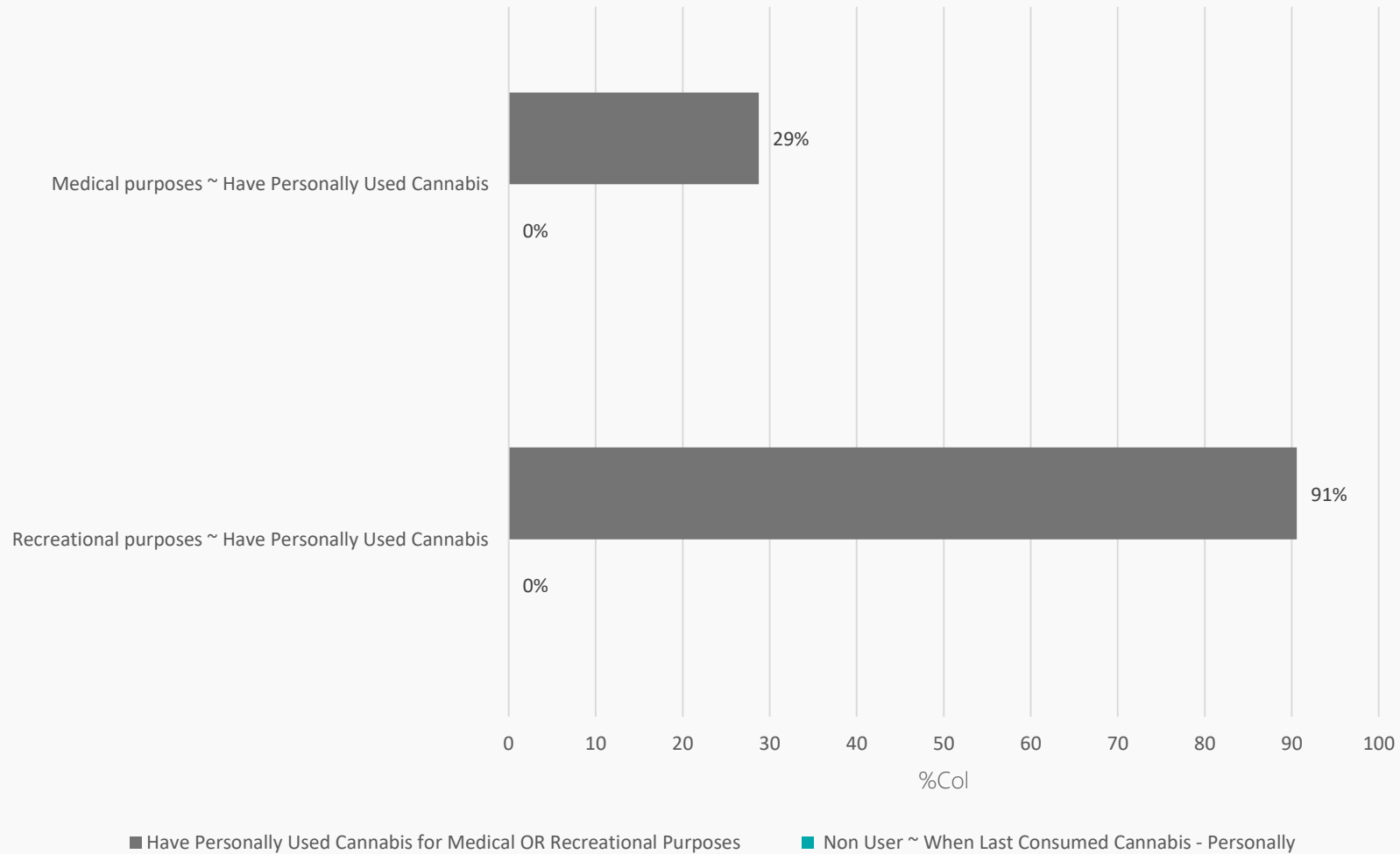
APPENDIX

Declared Study Parameters

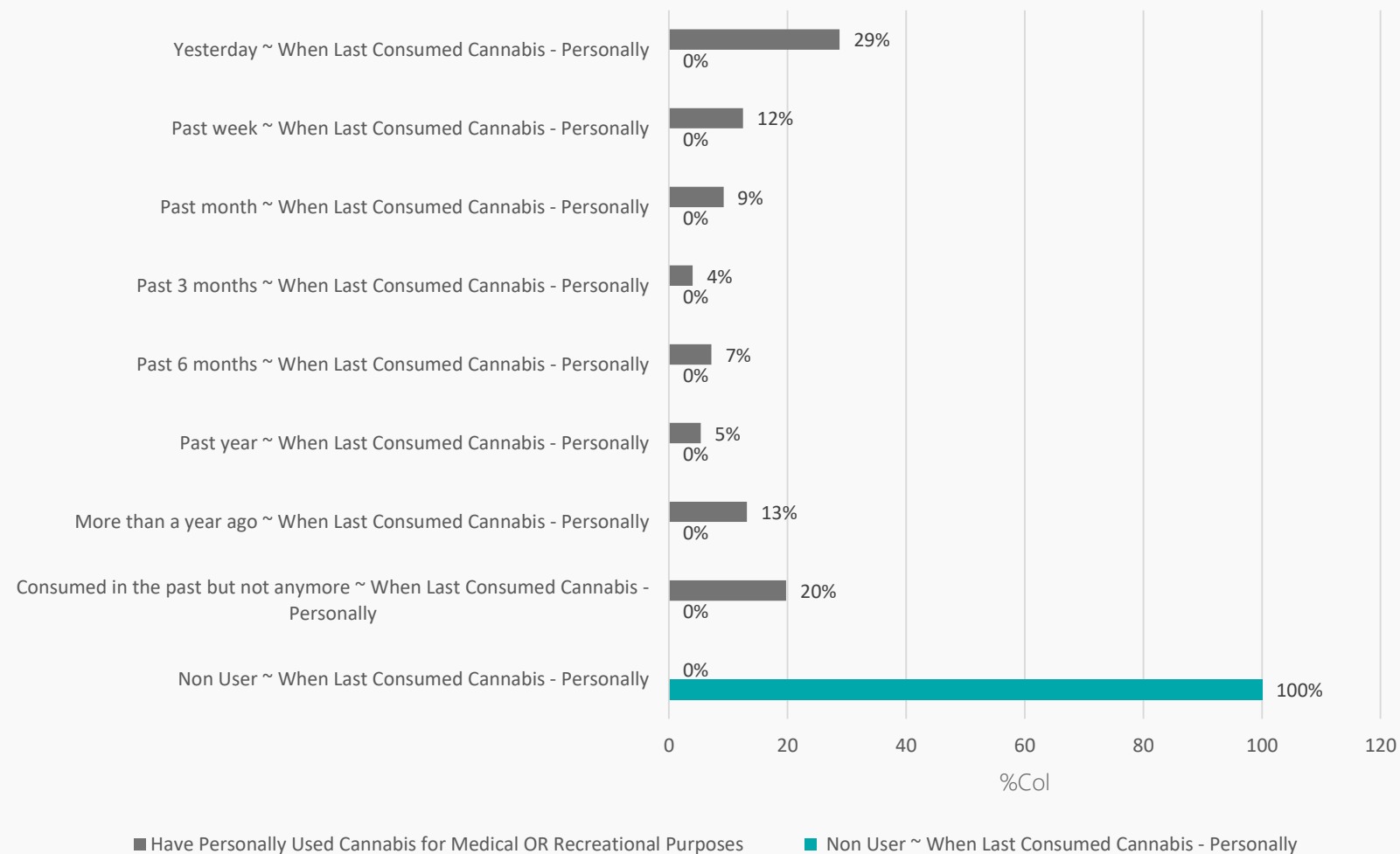
Vividata's Cannabis Study

- Vividata's 2018 Canadian Cannabis Study provides understanding on medicinal and recreational cannabis consumers and their relationship with cannabis ahead of legalization. This study will allow brands, media companies and advertising agencies to gain key insights into how Canadians consume and feel about cannabis, its upcoming legalization, their potential consumption post legalization, and much more.
- 2018 = The study was conducted between March 2nd – March 14th, 2018 with a total sample of 4880 adult Canadians (19+). Of the total sample, 1025 respondents claimed to be users of Cannabis. The sample includes provincial, age, and gender (male and female) representation, and is projected to Statistics Canada's 19+ population.
- 2019 = Nationally representative surveying was done during March, 2019. This resulted in a total of just over 5,000 respondents (composed of cannabis users and nonusers). The Canadian Cannabis Study: Post-legalization Usage and Opinions data were then integrated to Vividata's Study of the Canadian Consumer (Spring 2019).
 - What's included?
 - Consumptions Habits
 - Motivation To Consume
 - How Obtained For Self
 - Opinions on Legalization
 - Effects of Consumption
 - Potential Consumption
 - What do we want to know?
 - Change in Canadian behaviour on cannabis...
 - ...usage
 - ...motivations and purchase
 - ...advertising, public education, and attitudes

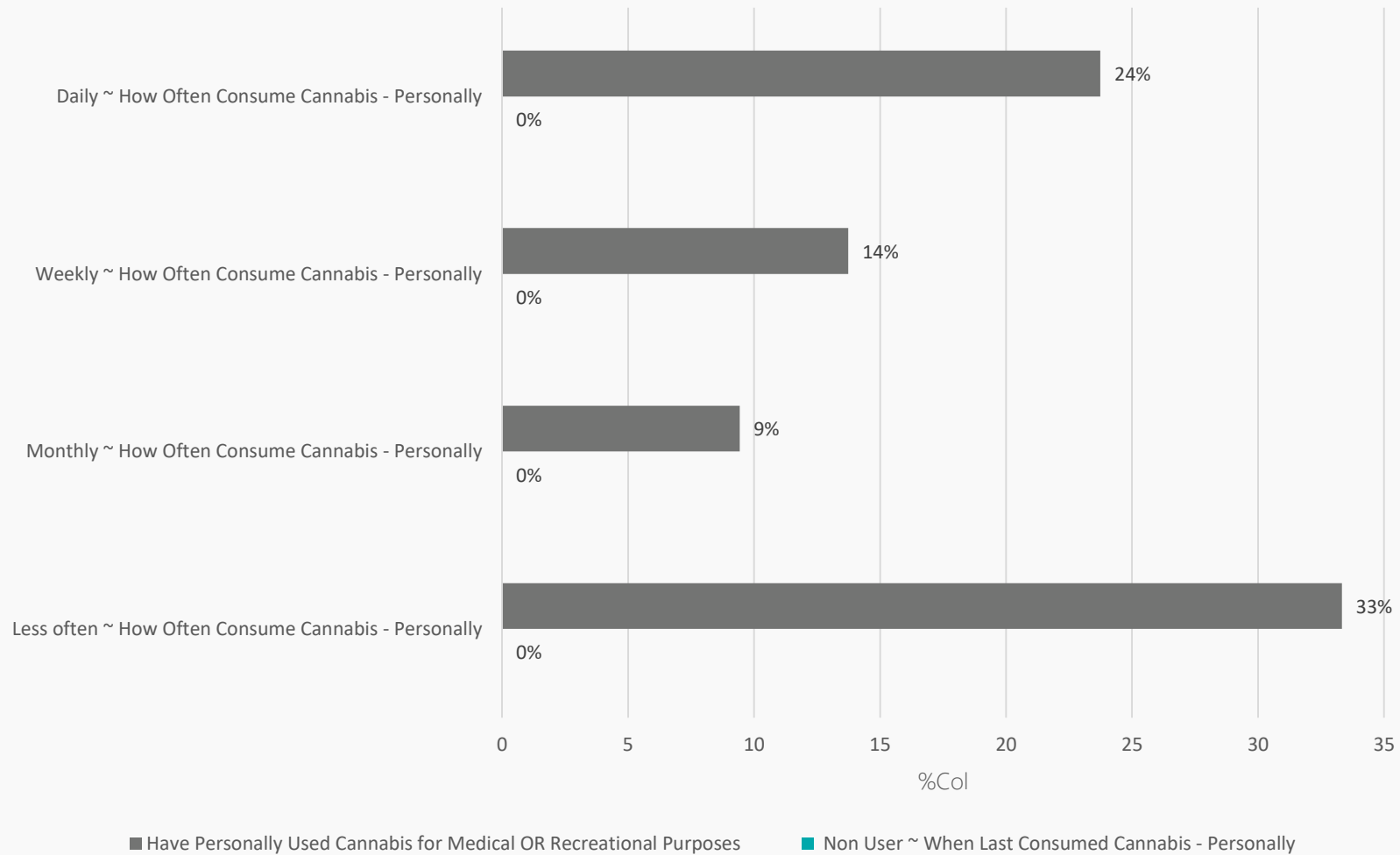
Have Personally Used Cannabis



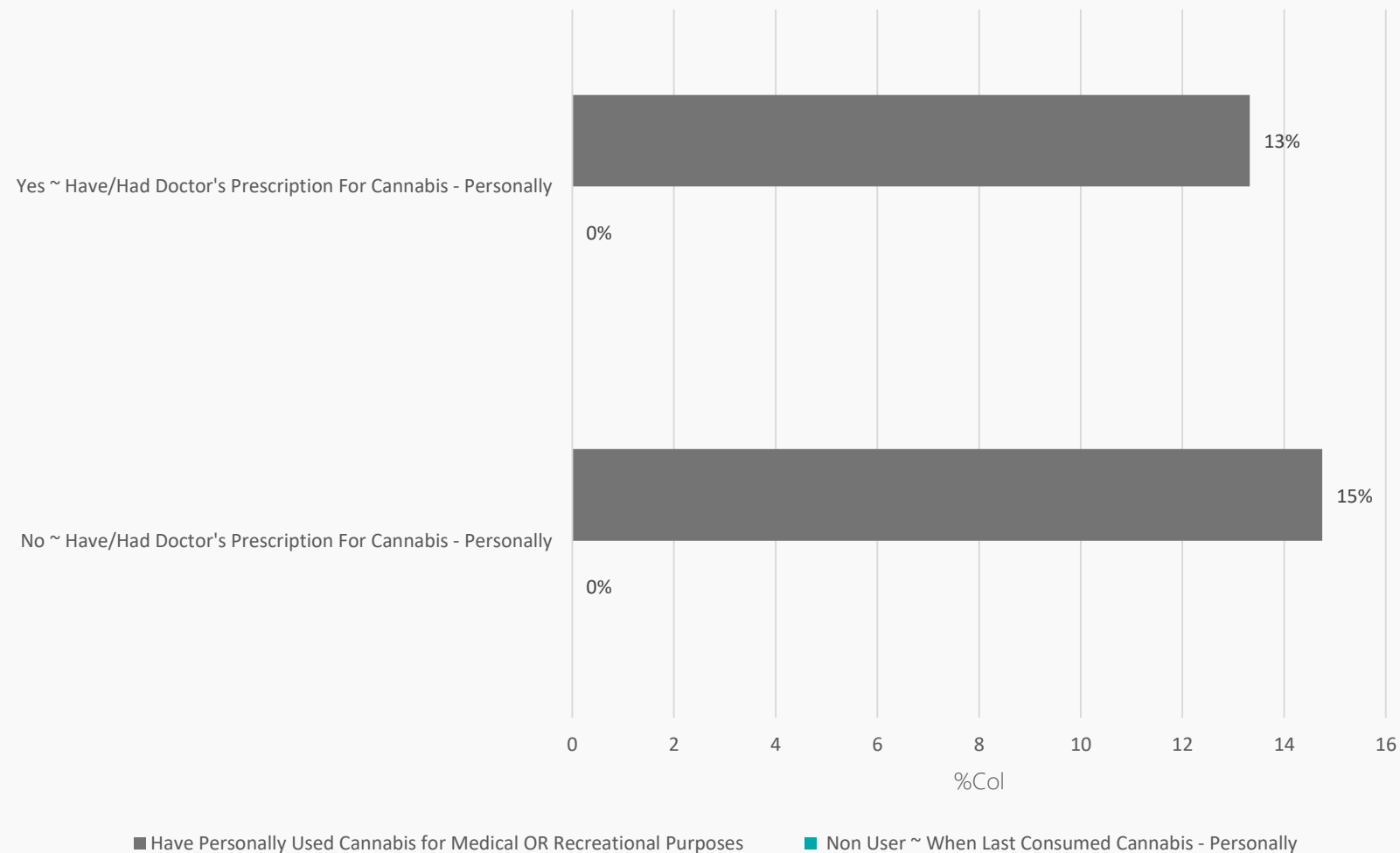
When Last Consumed Cannabis - Personally



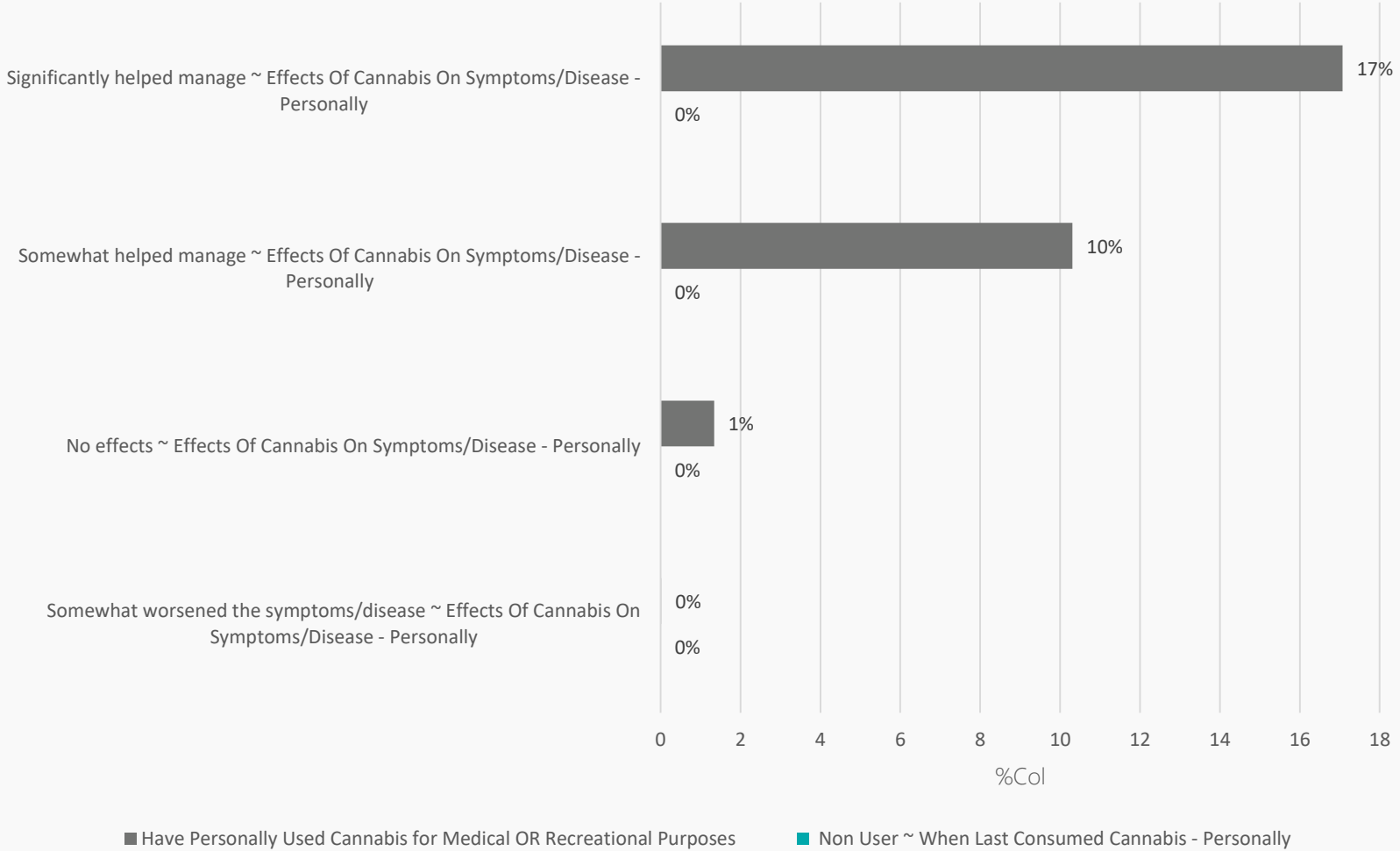
How Often Consume Cannabis - Personally



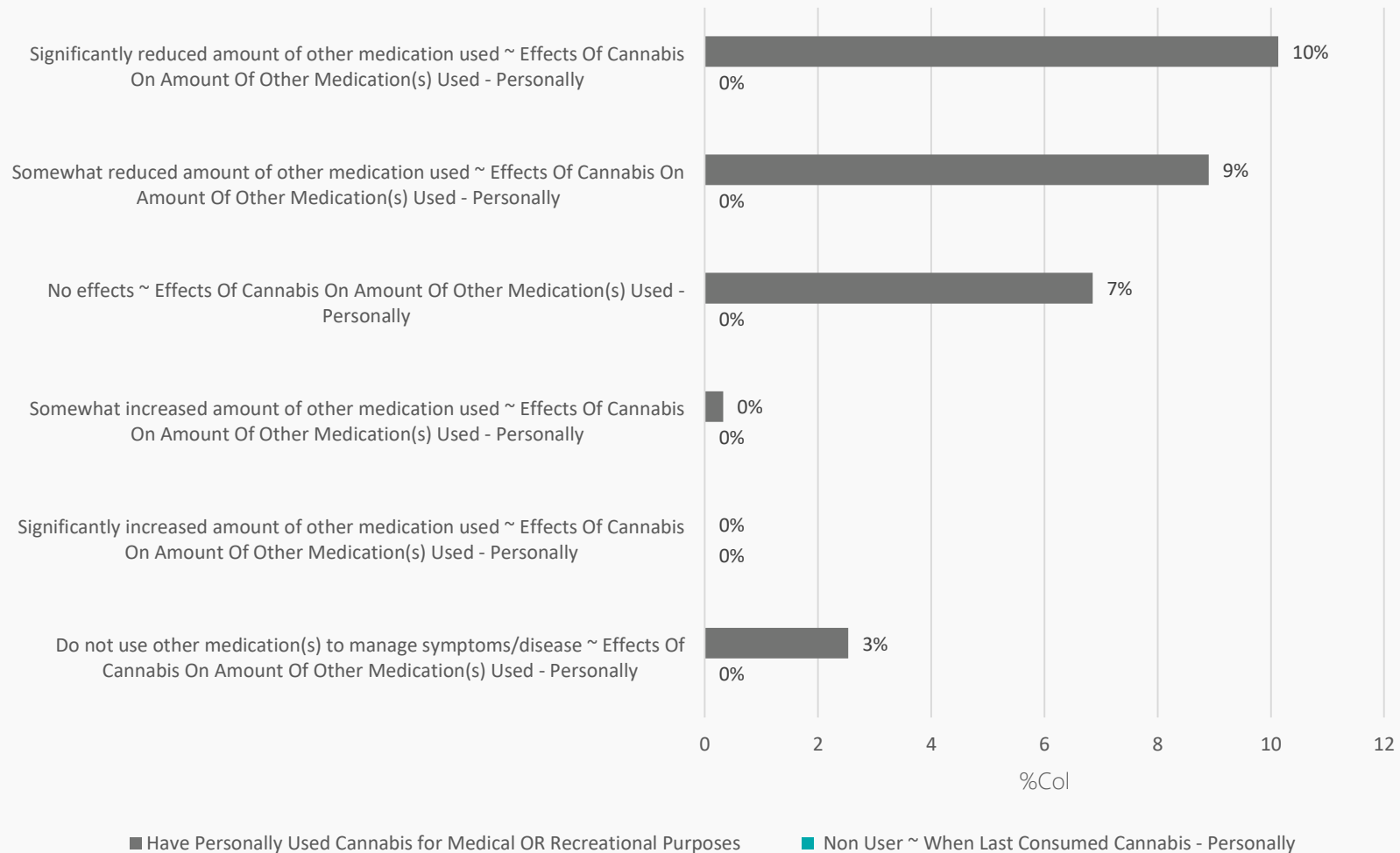
Have/Had Doctor's Prescription For Cannabis - Personally



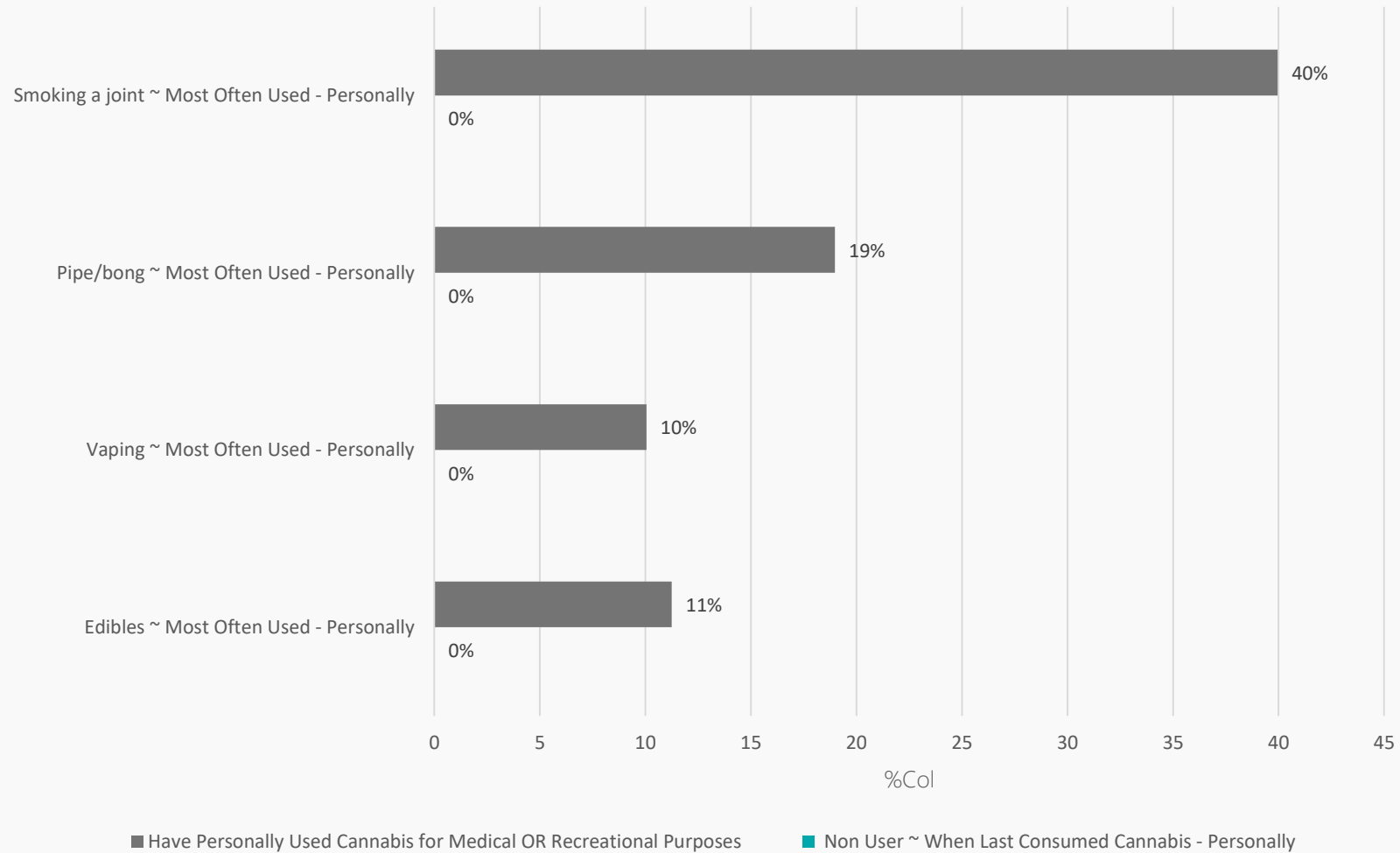
Effects Of Cannabis On Symptoms/Disease - Personally



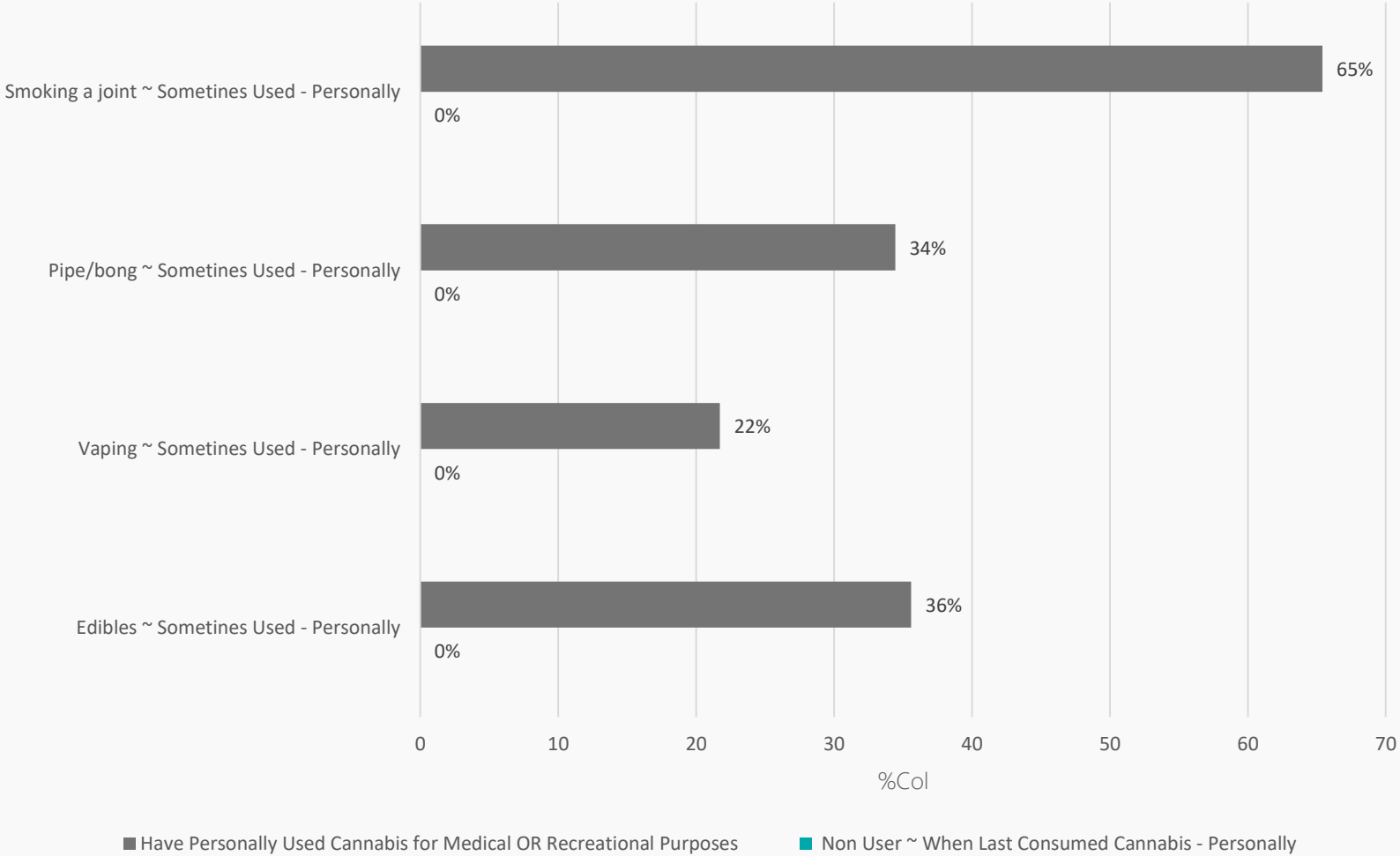
Effects Of Cannabis On Amount Of Other Medication(s) Used - Personally



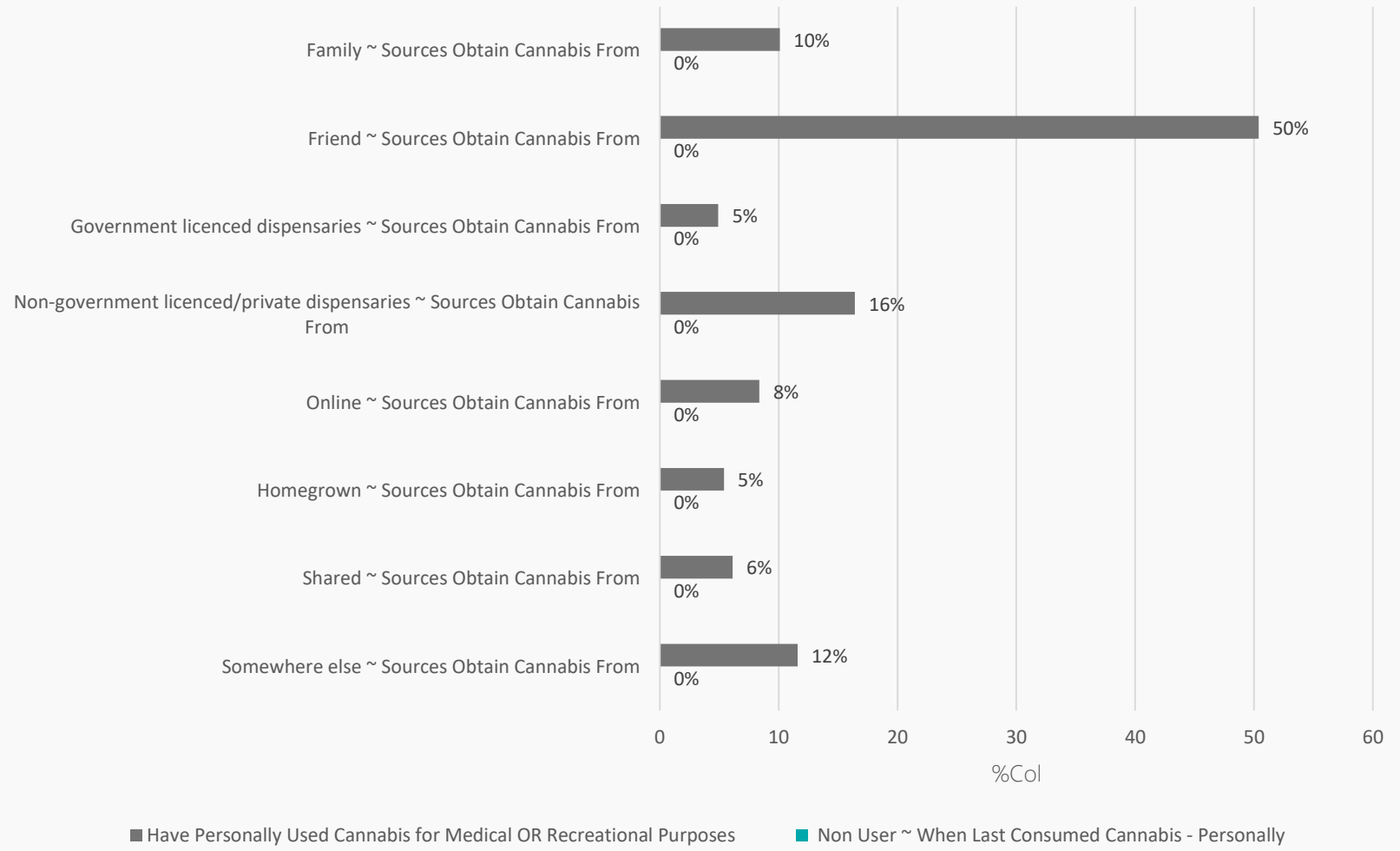
Most Often Used - Personally



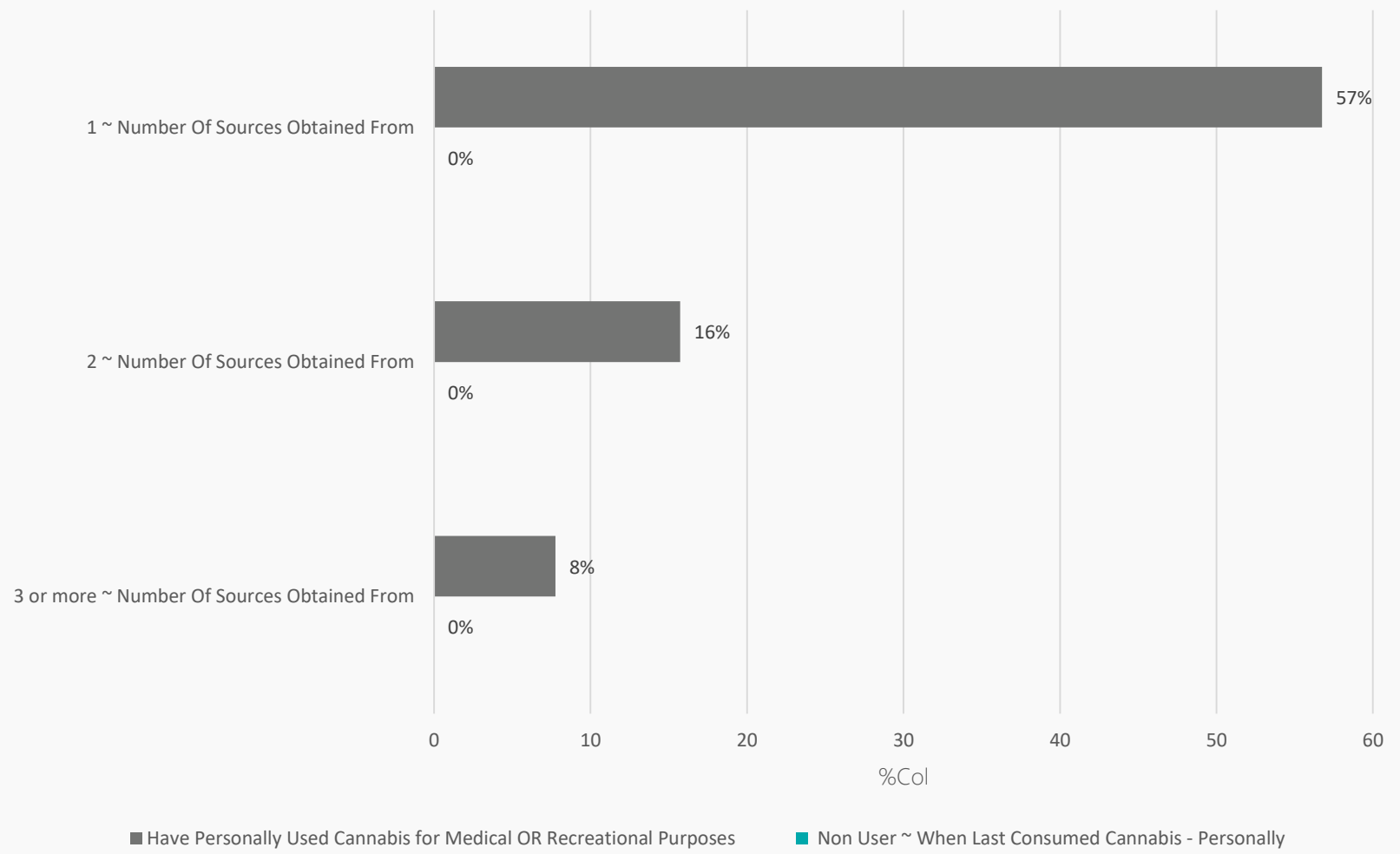
Sometimes Used - Personally



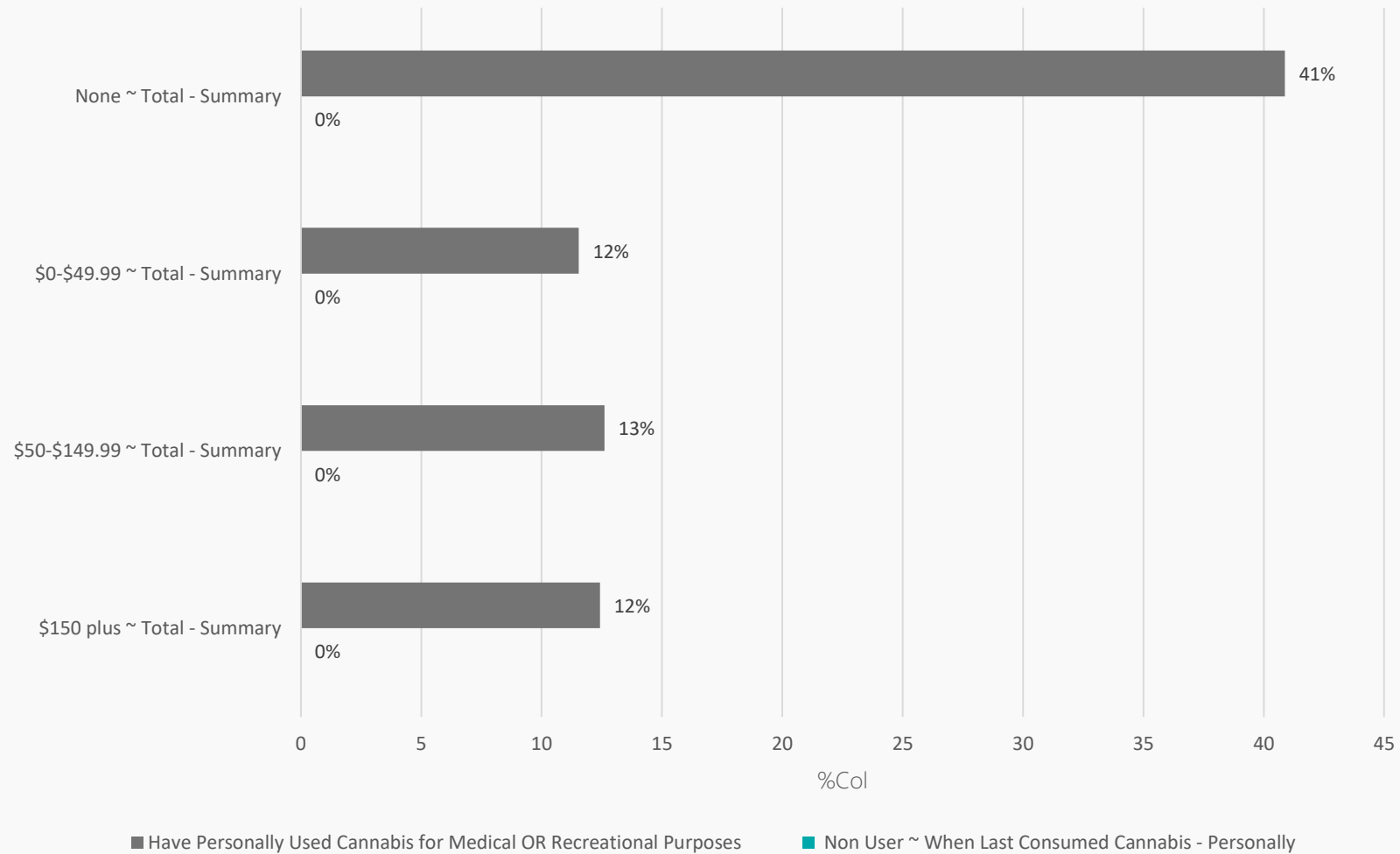
Sources Obtain Cannabis From



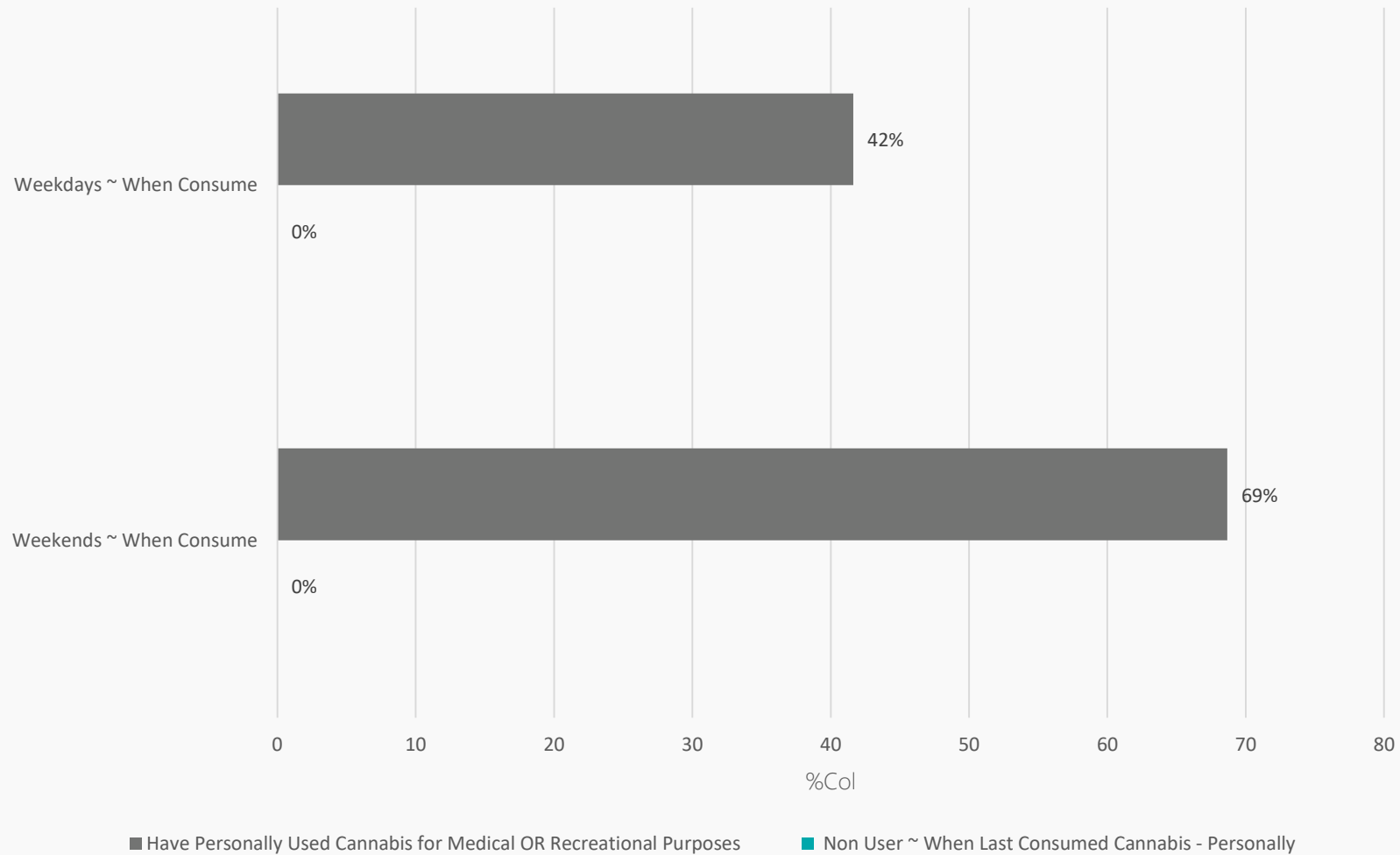
Number Of Sources Obtained From



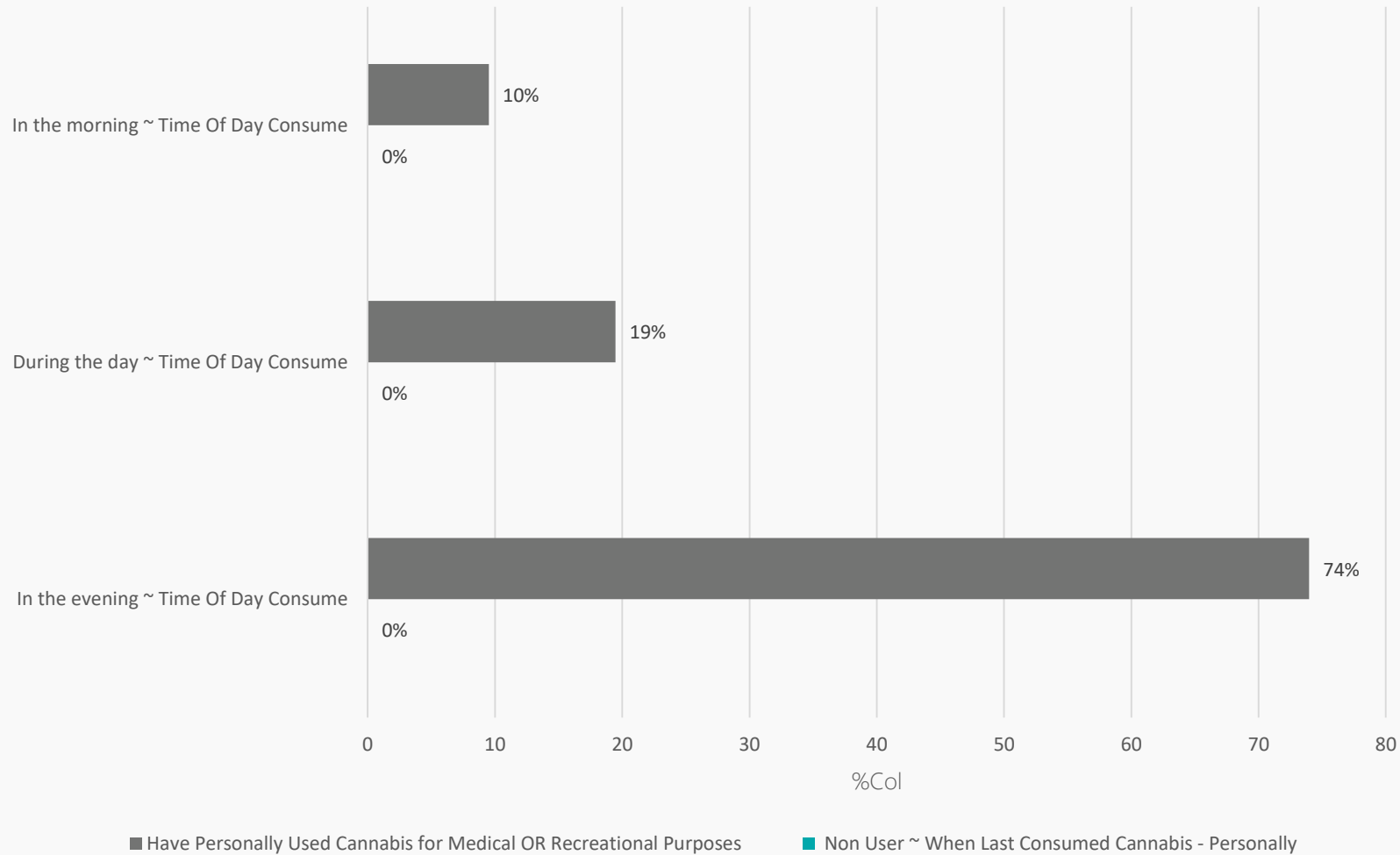
Total - Summary



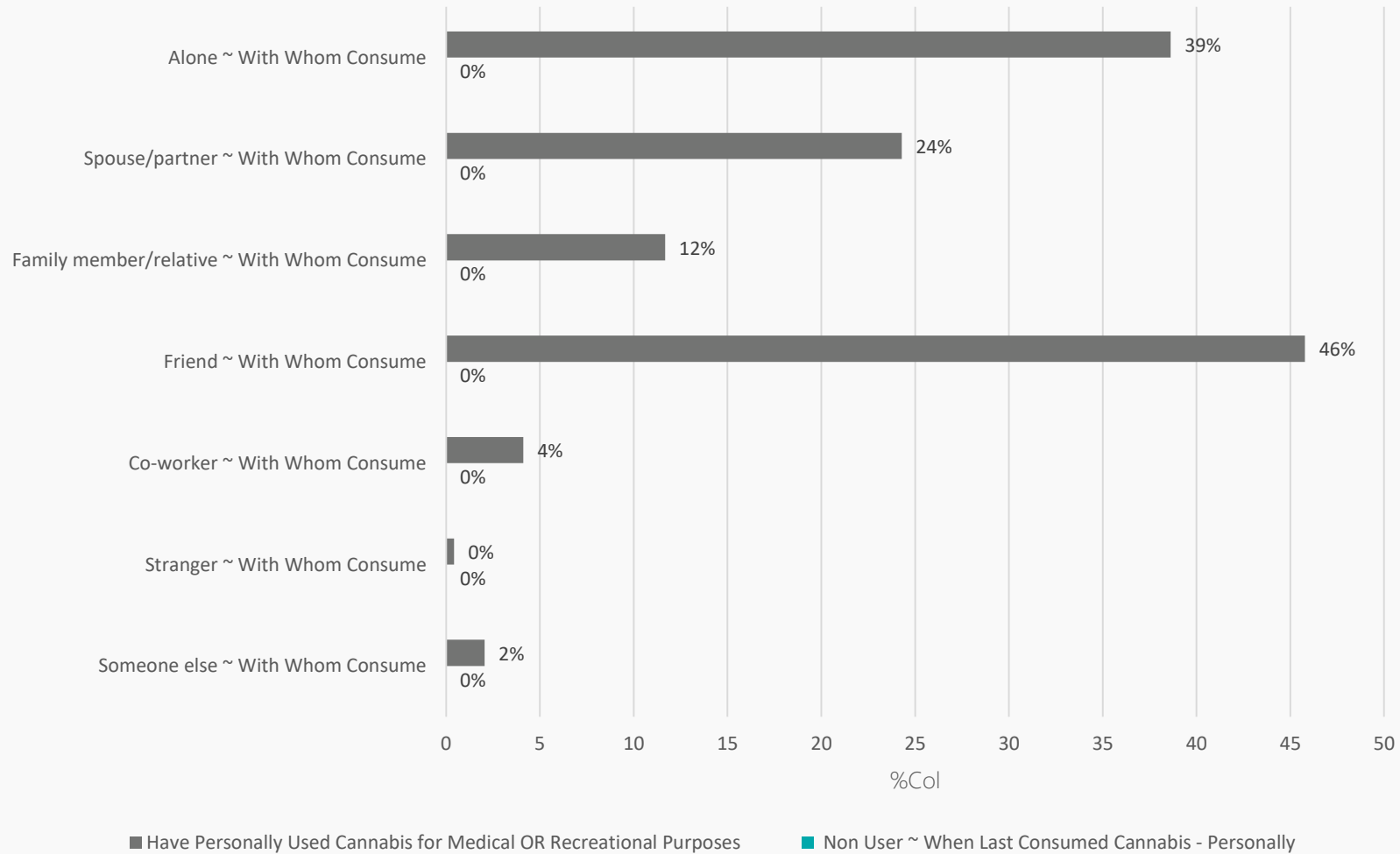
When Consume



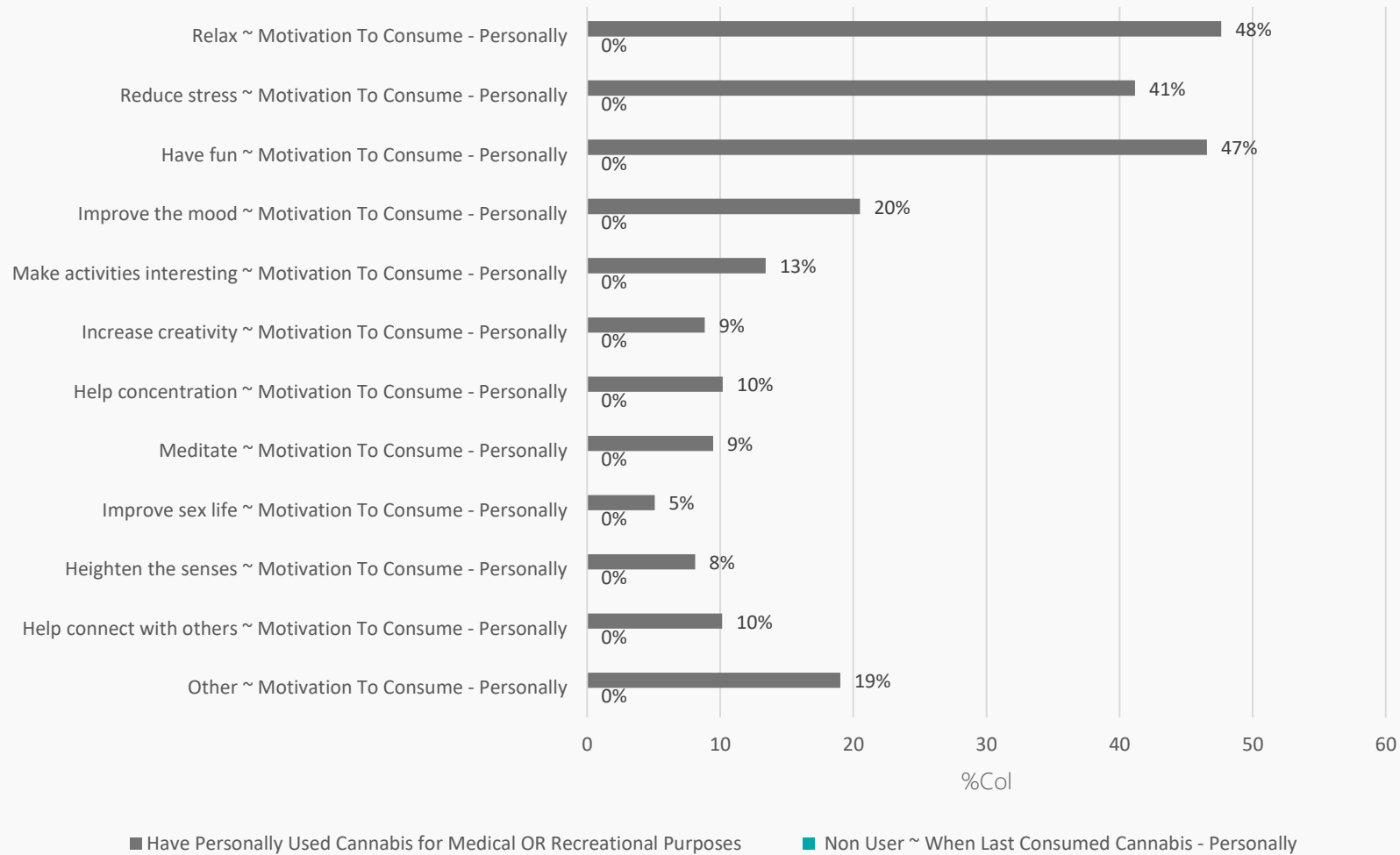
Time Of Day Consume



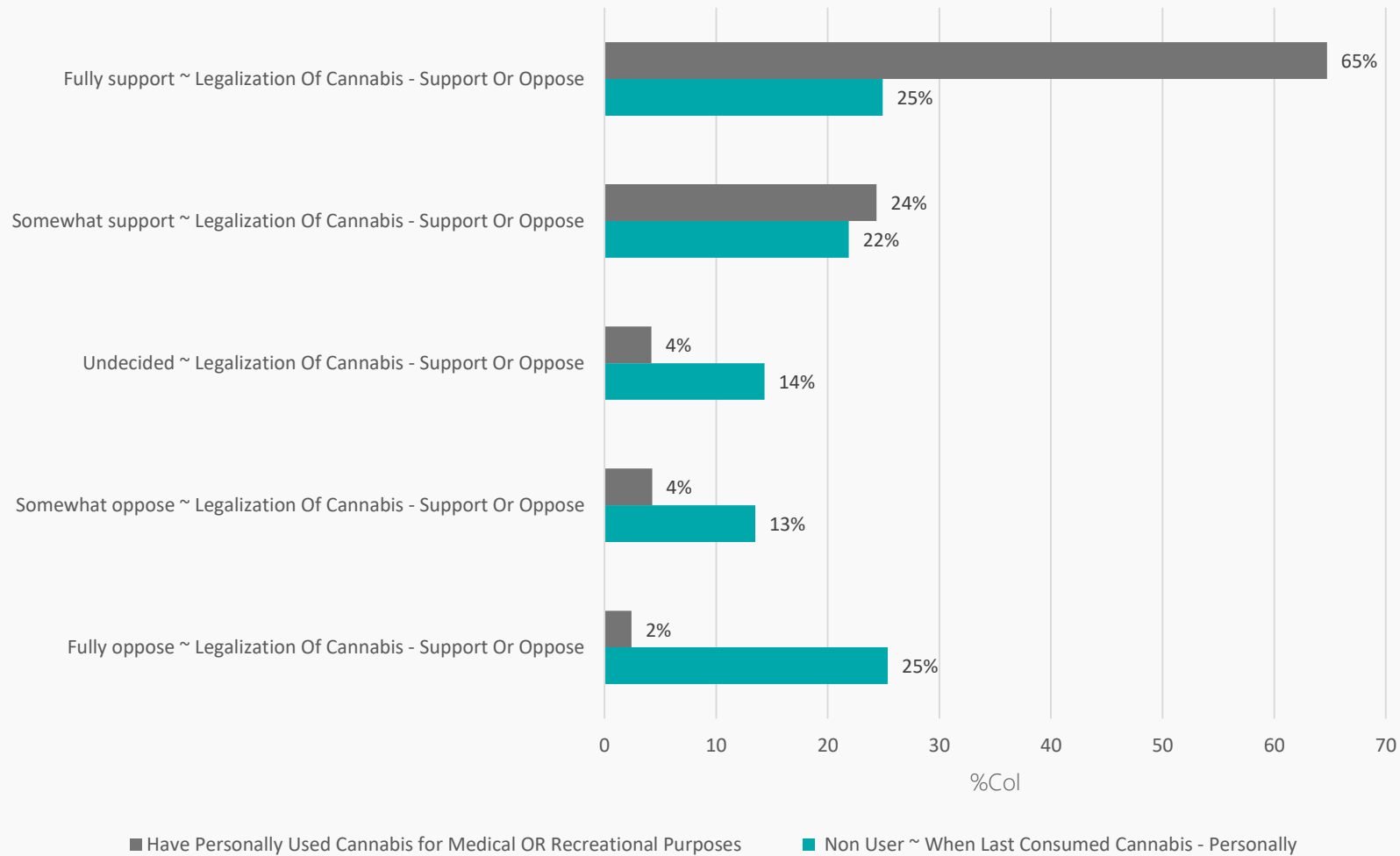
With Whom Consume



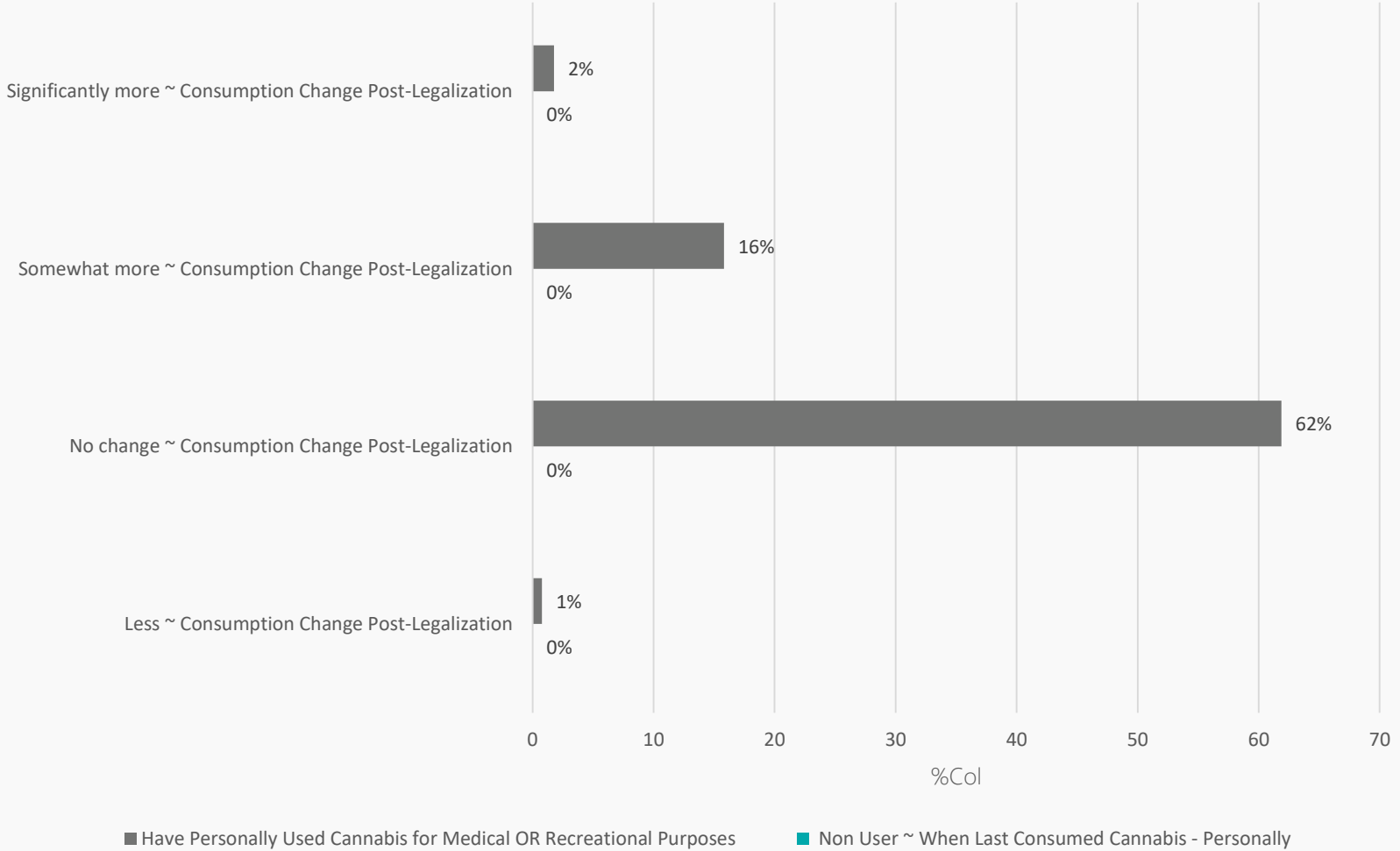
Motivation To Consume - Personally



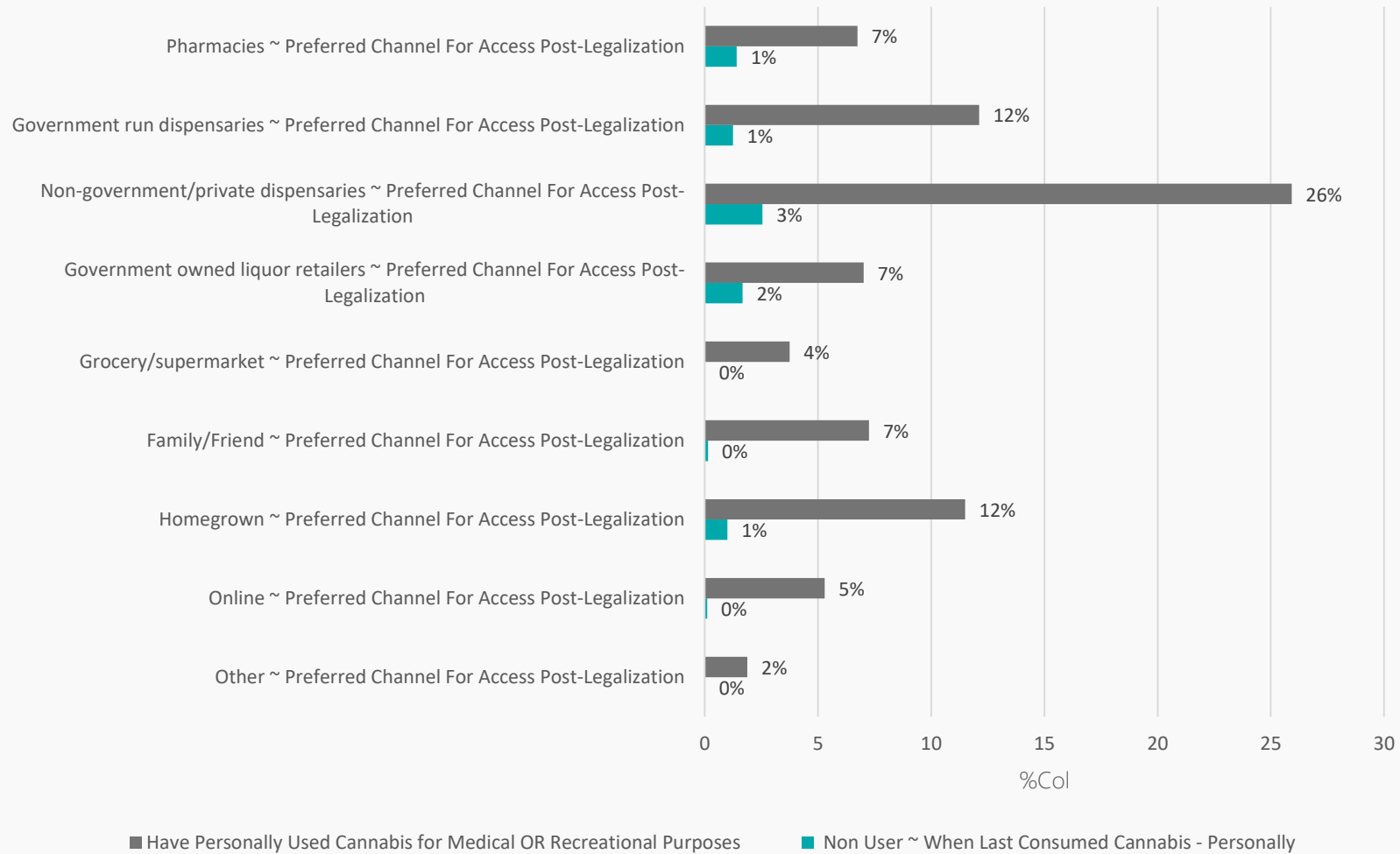
Legalization Of Cannabis - Support Or Oppose



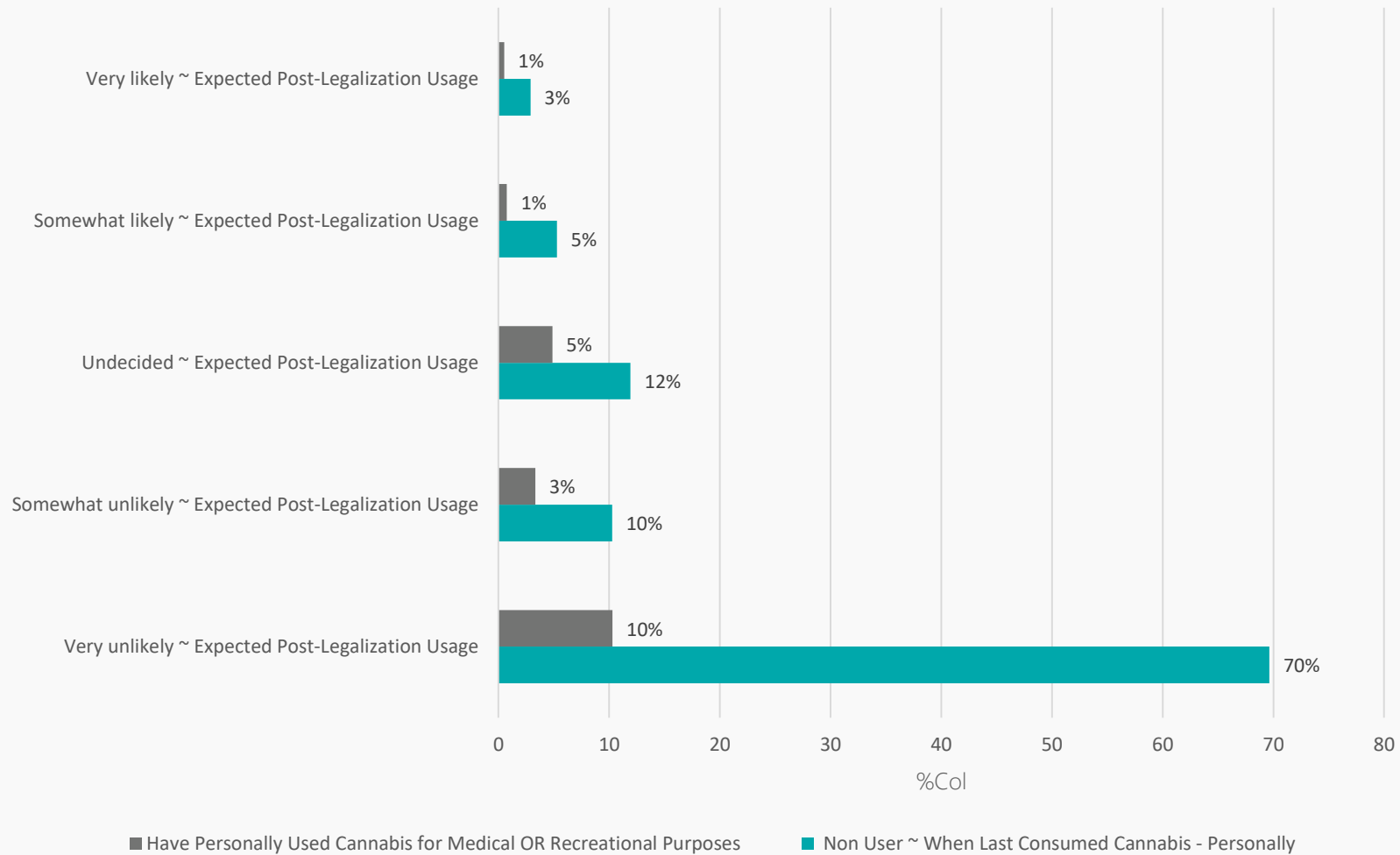
Consumption Change Post-Legalization



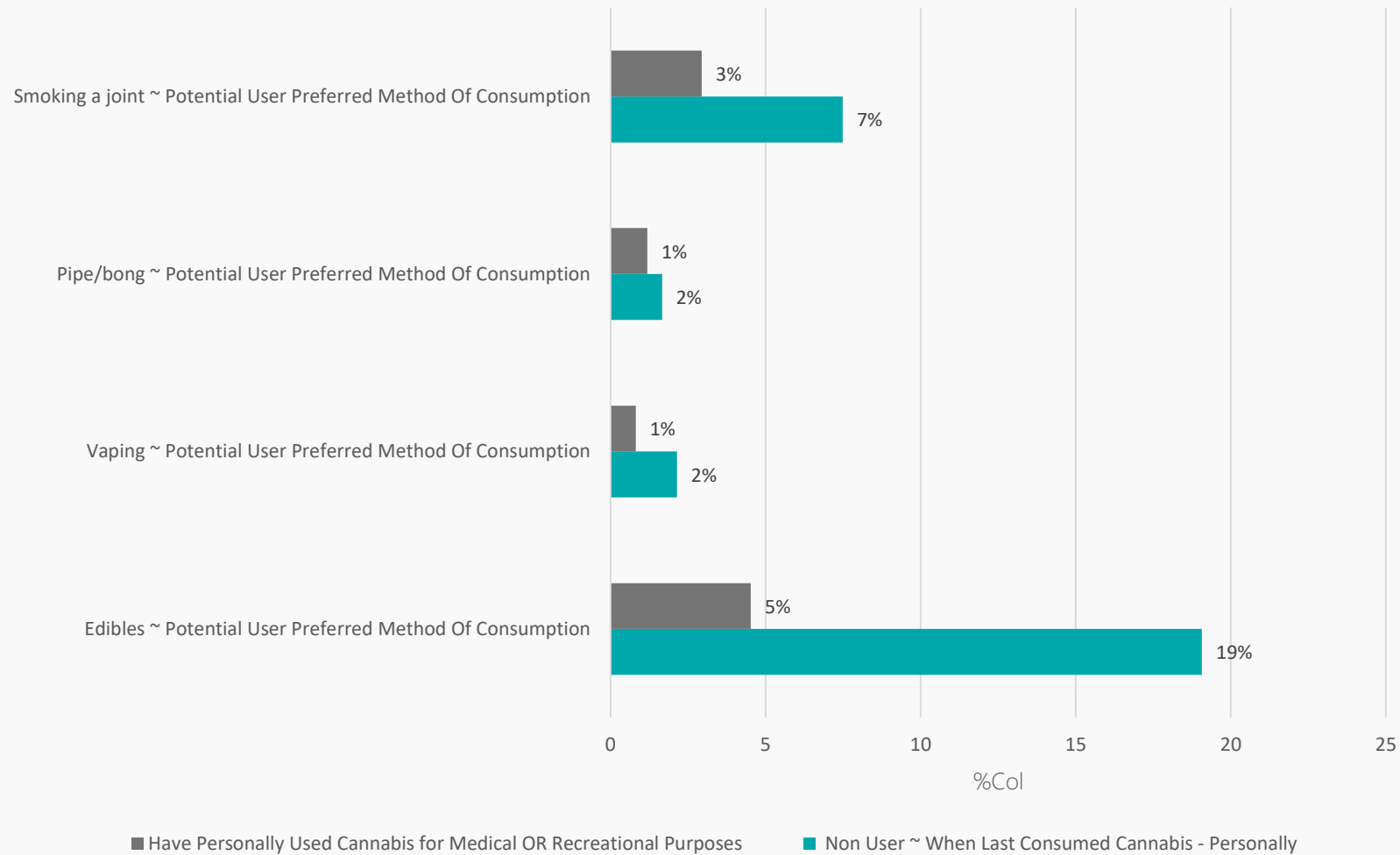
Preferred Channel For Access Post-Legalization



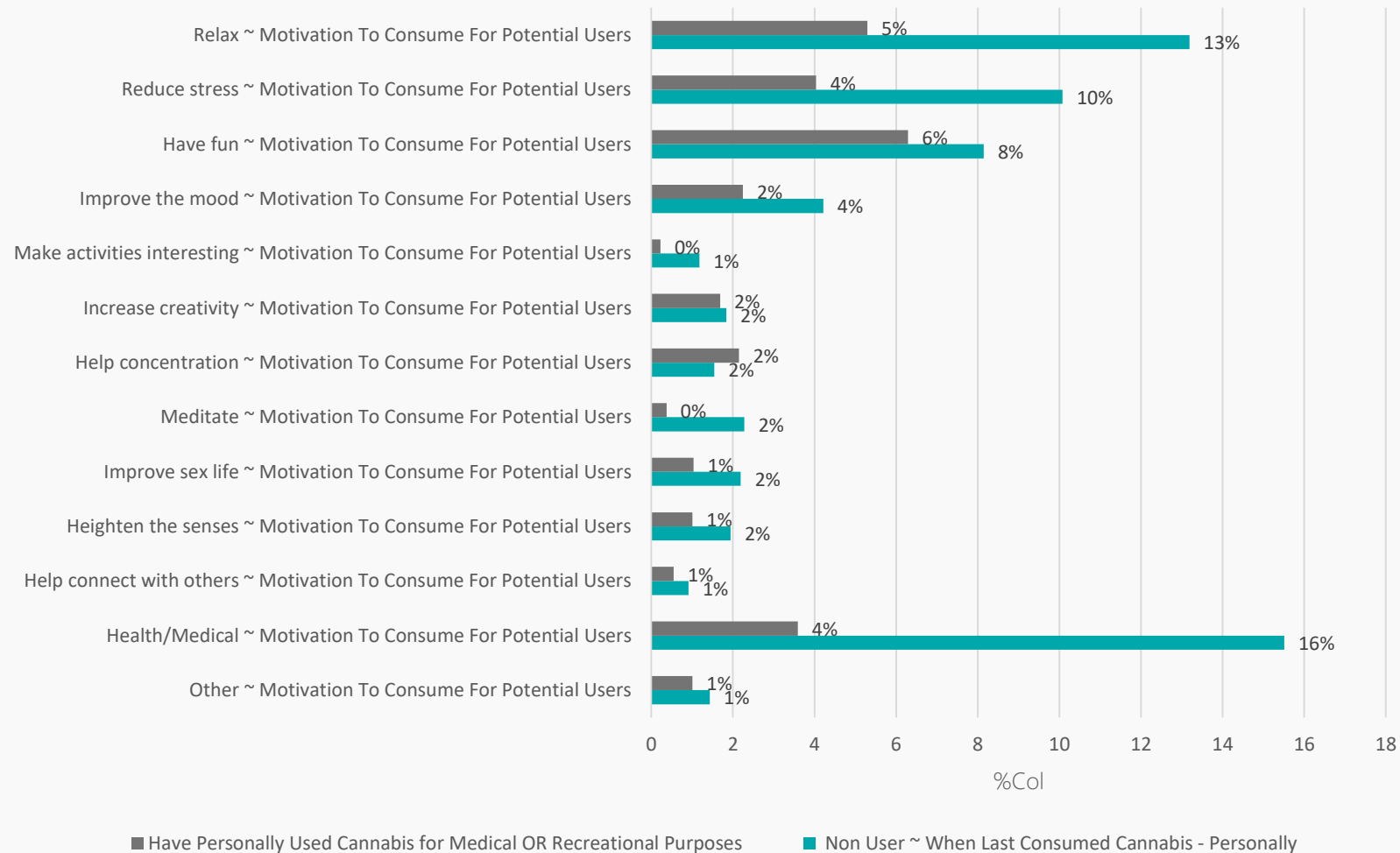
Expected Post-Legalization Usage



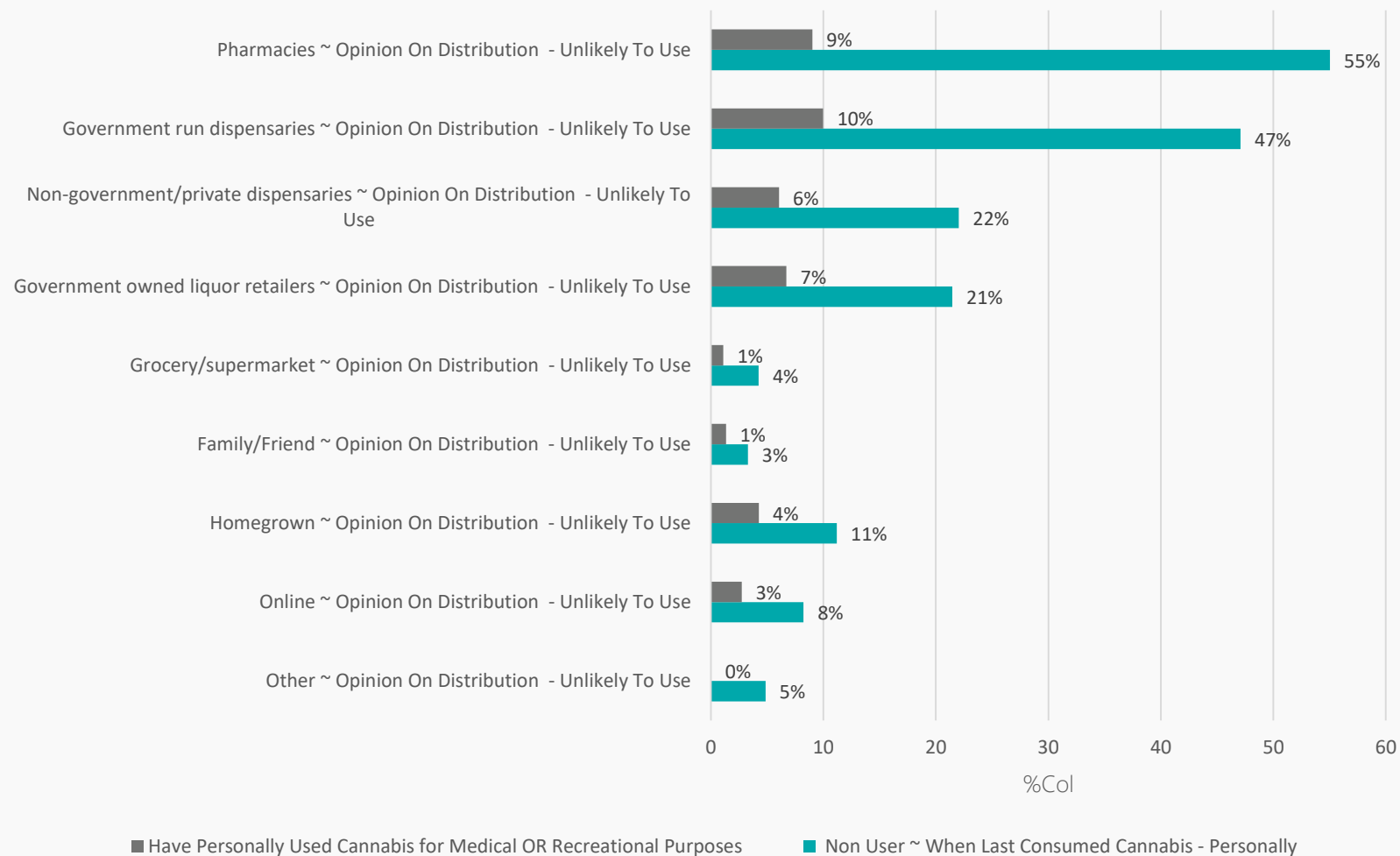
Potential User Preferred Method Of Consumption



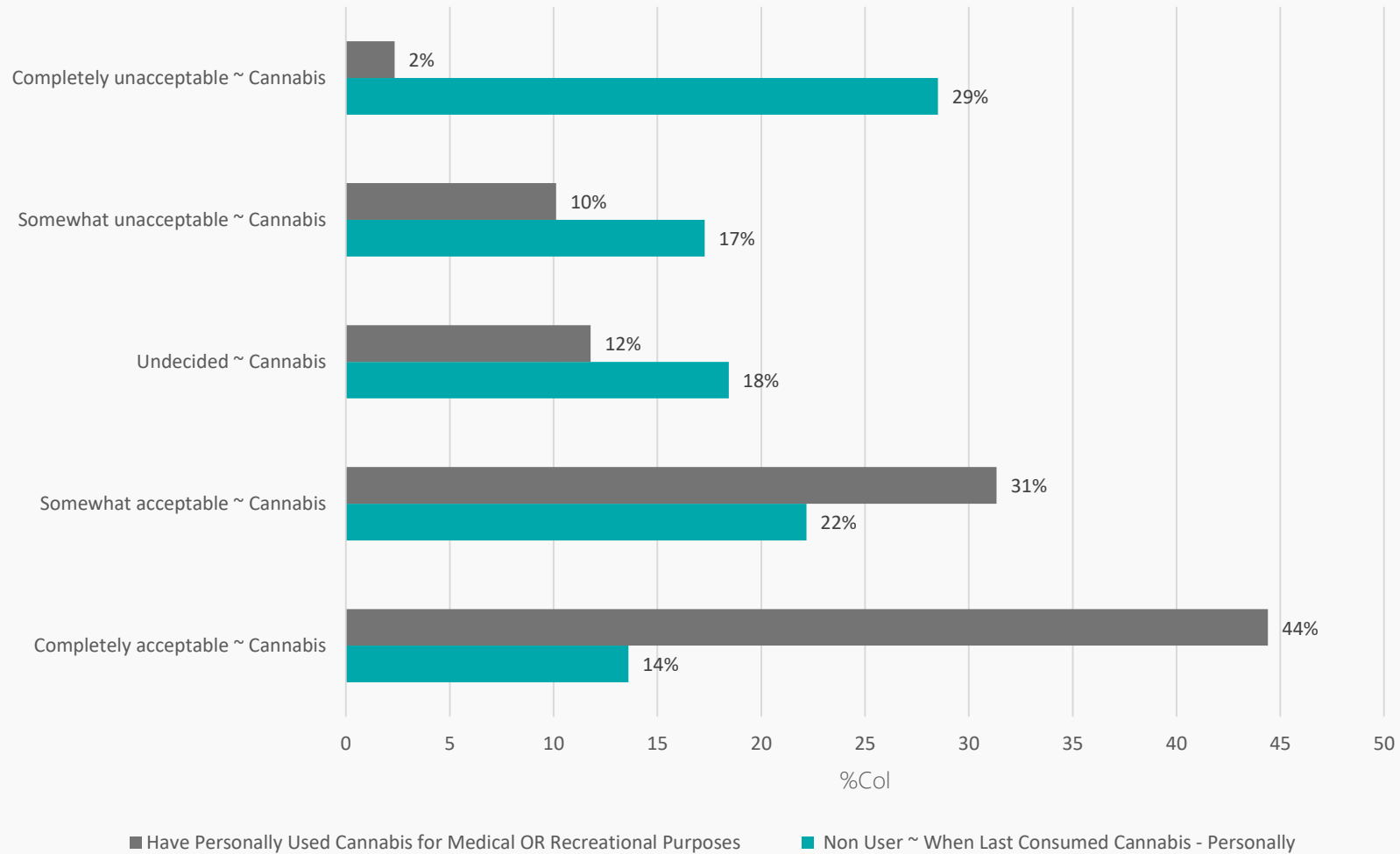
Motivation To Consume For Potential Users



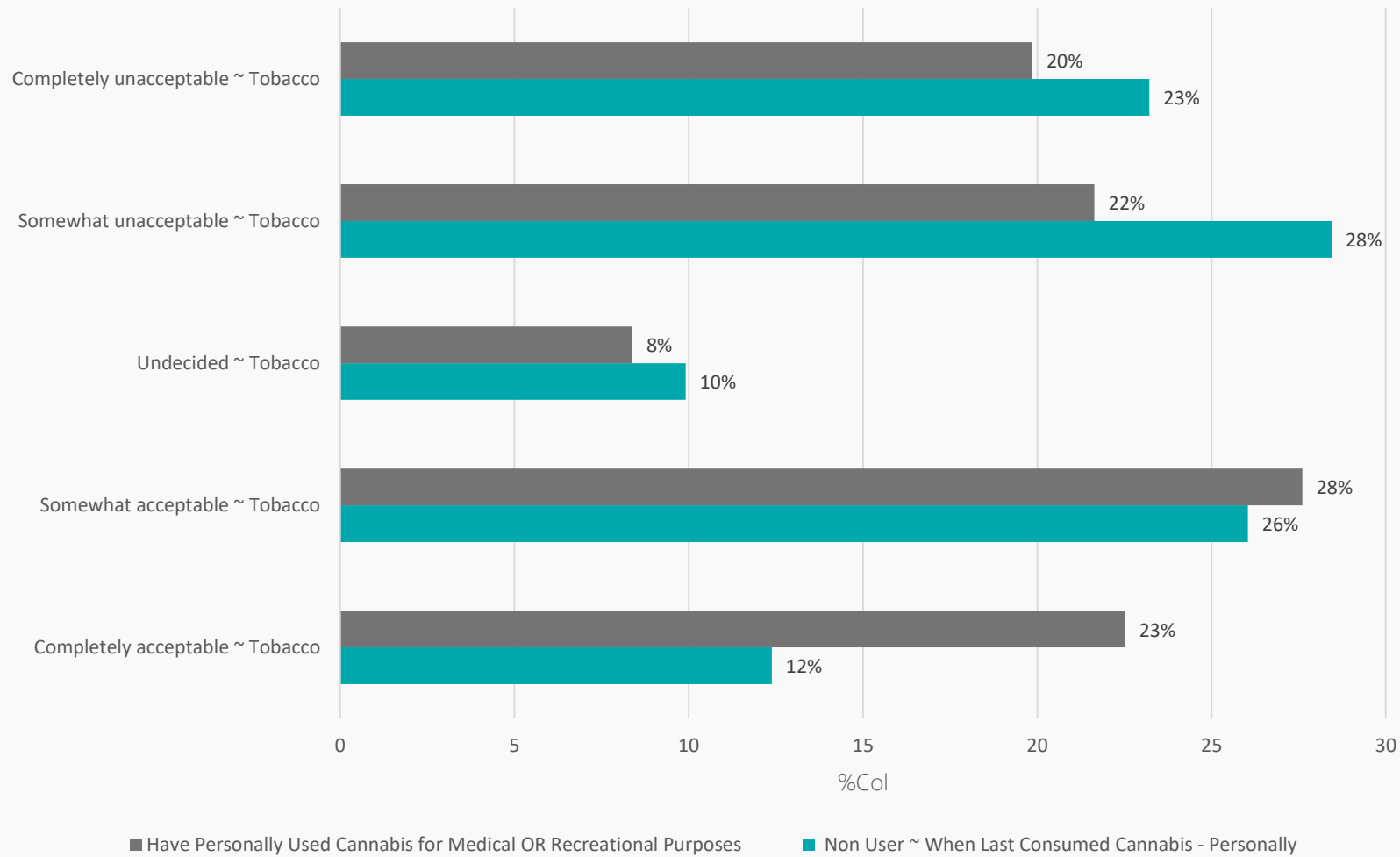
Opinion On Distribution - Unlikely To Use



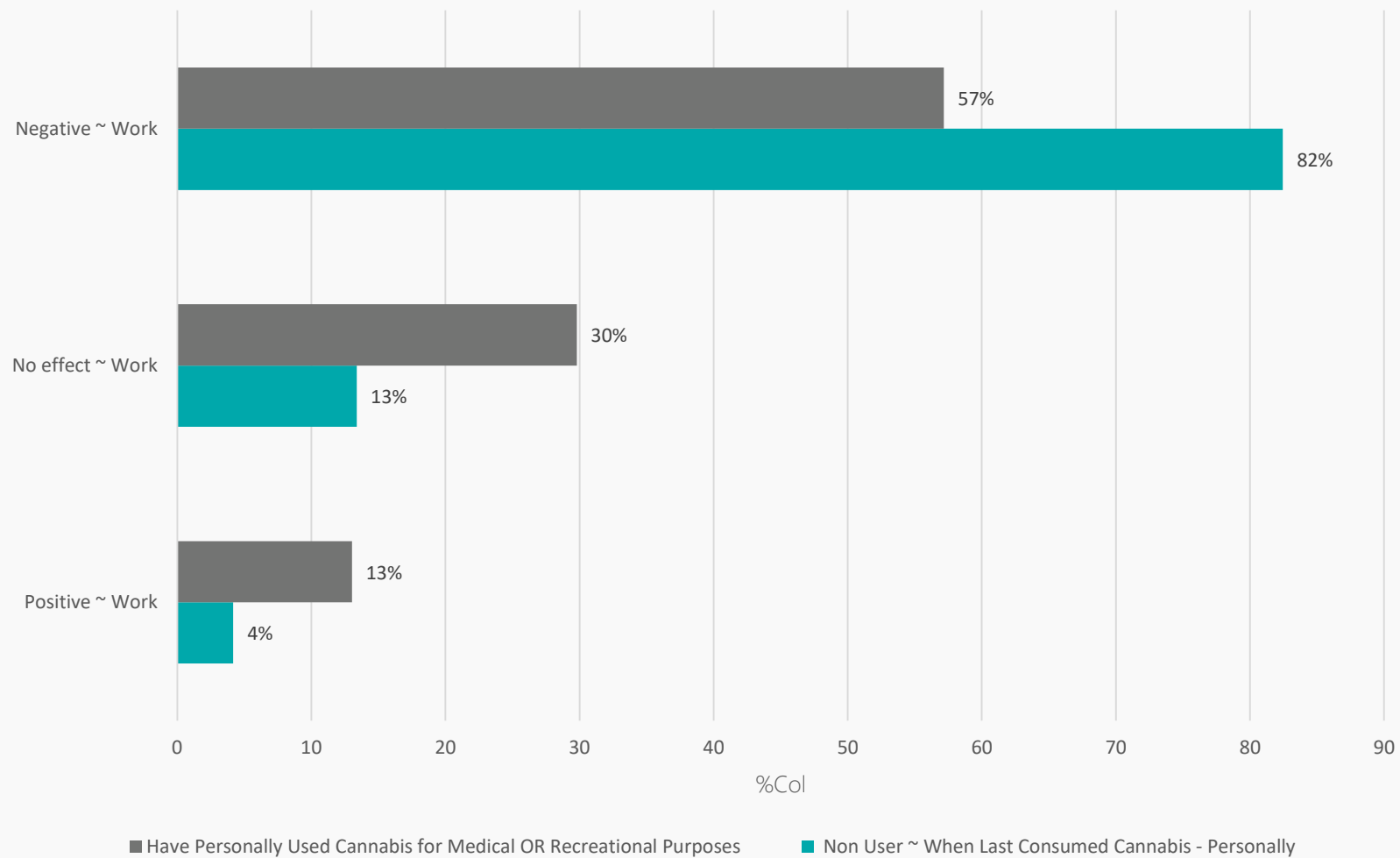
Cannabis



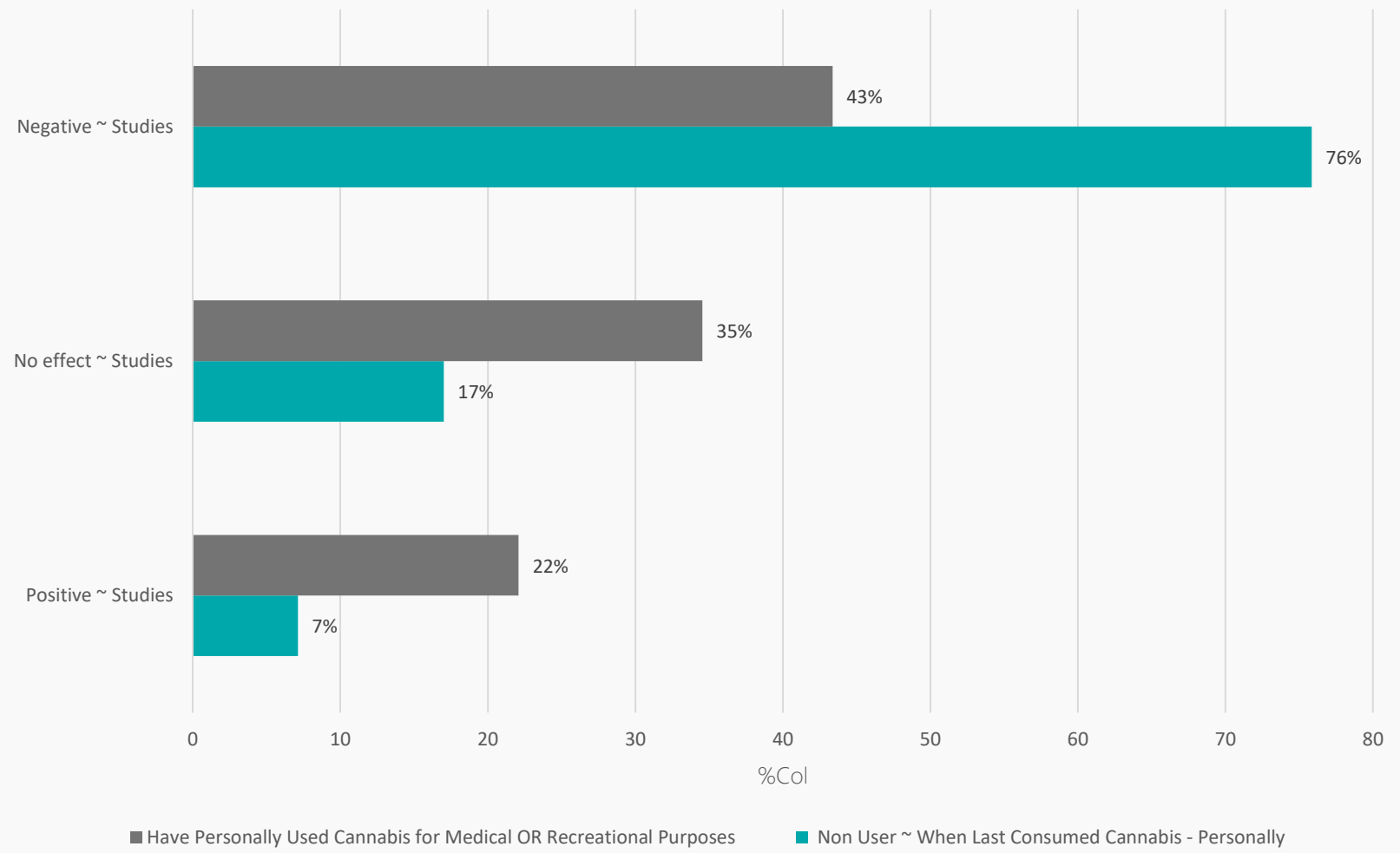
Tobacco



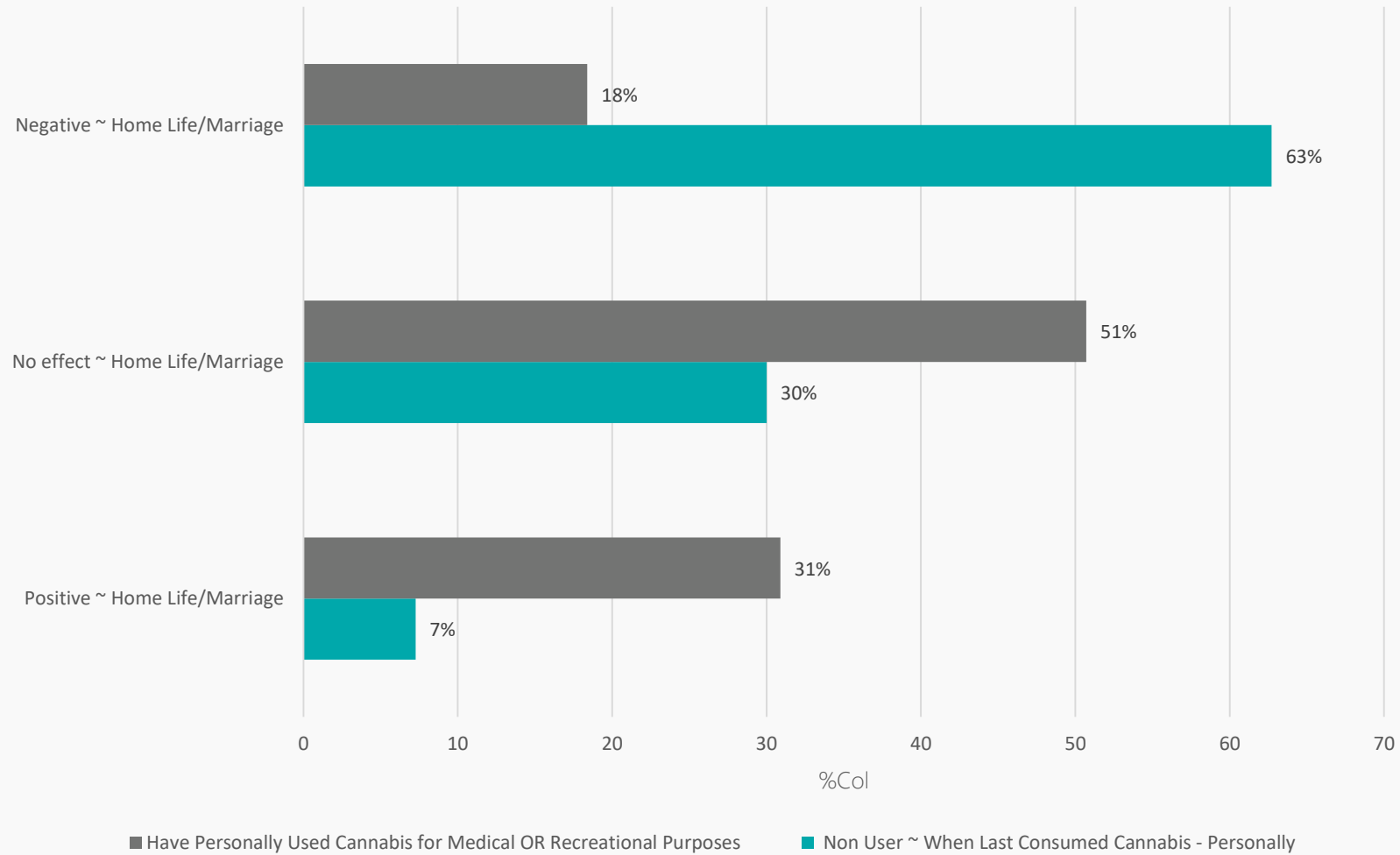
Work



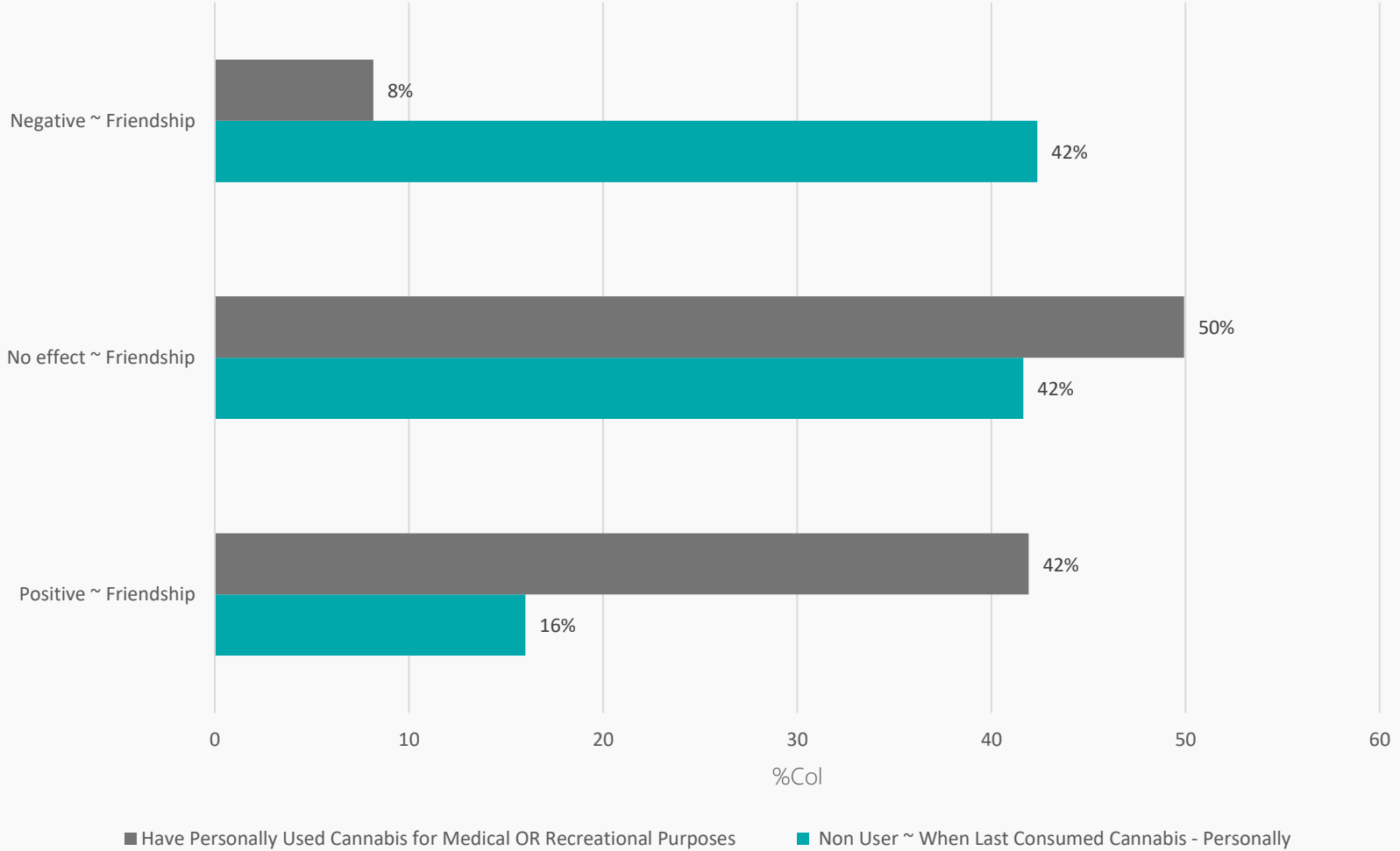
Studies



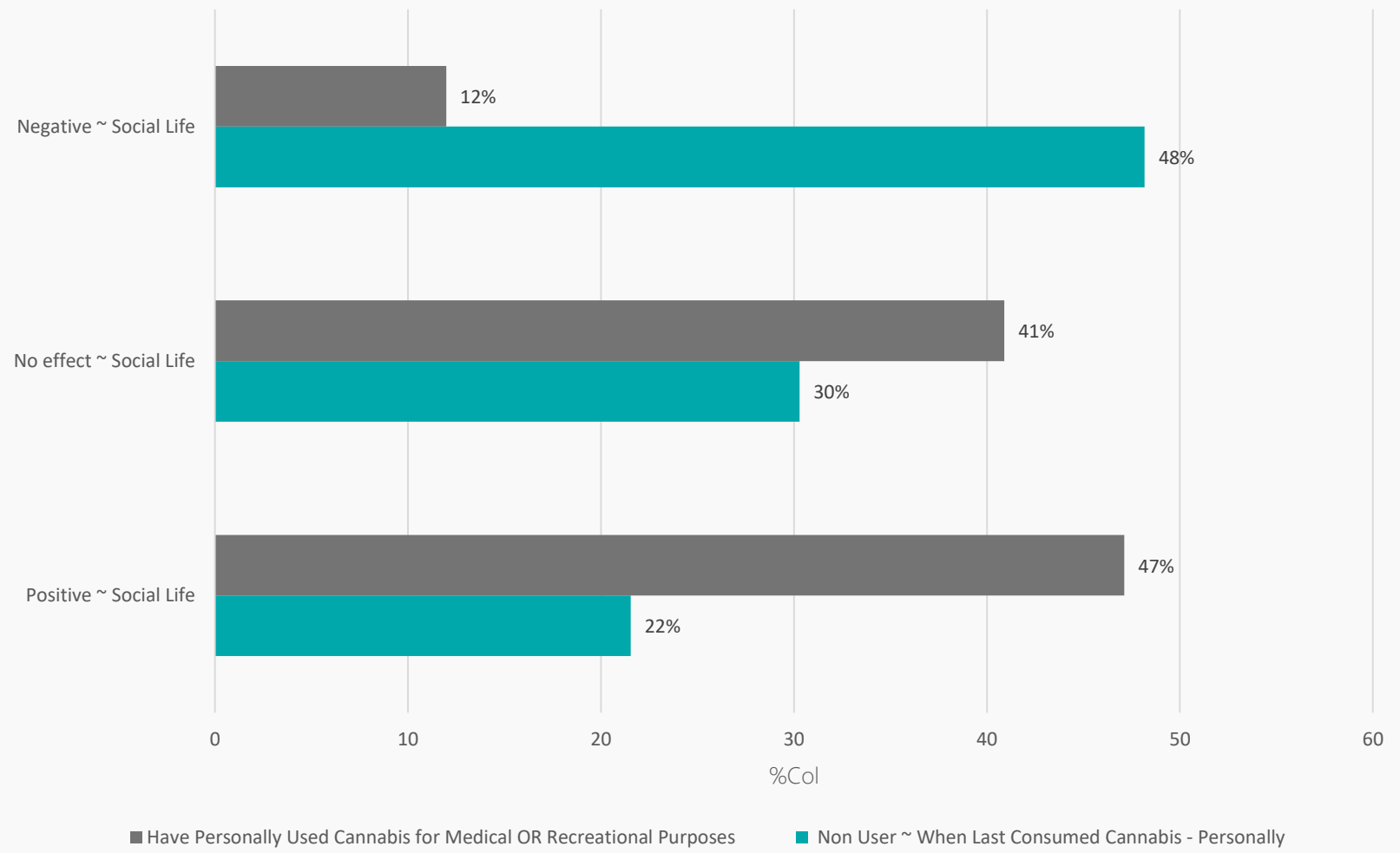
Home Life/Marriage



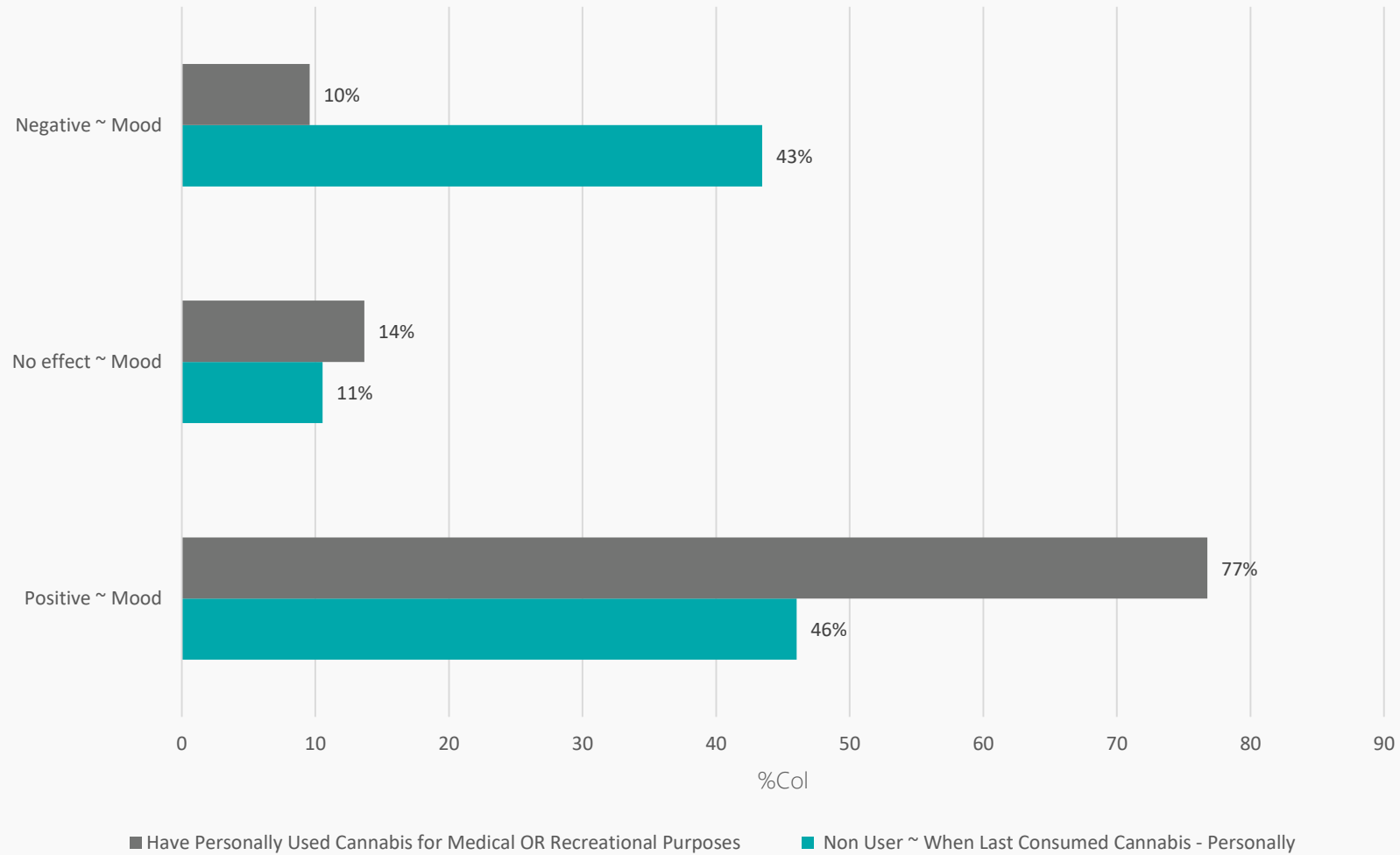
Friendship



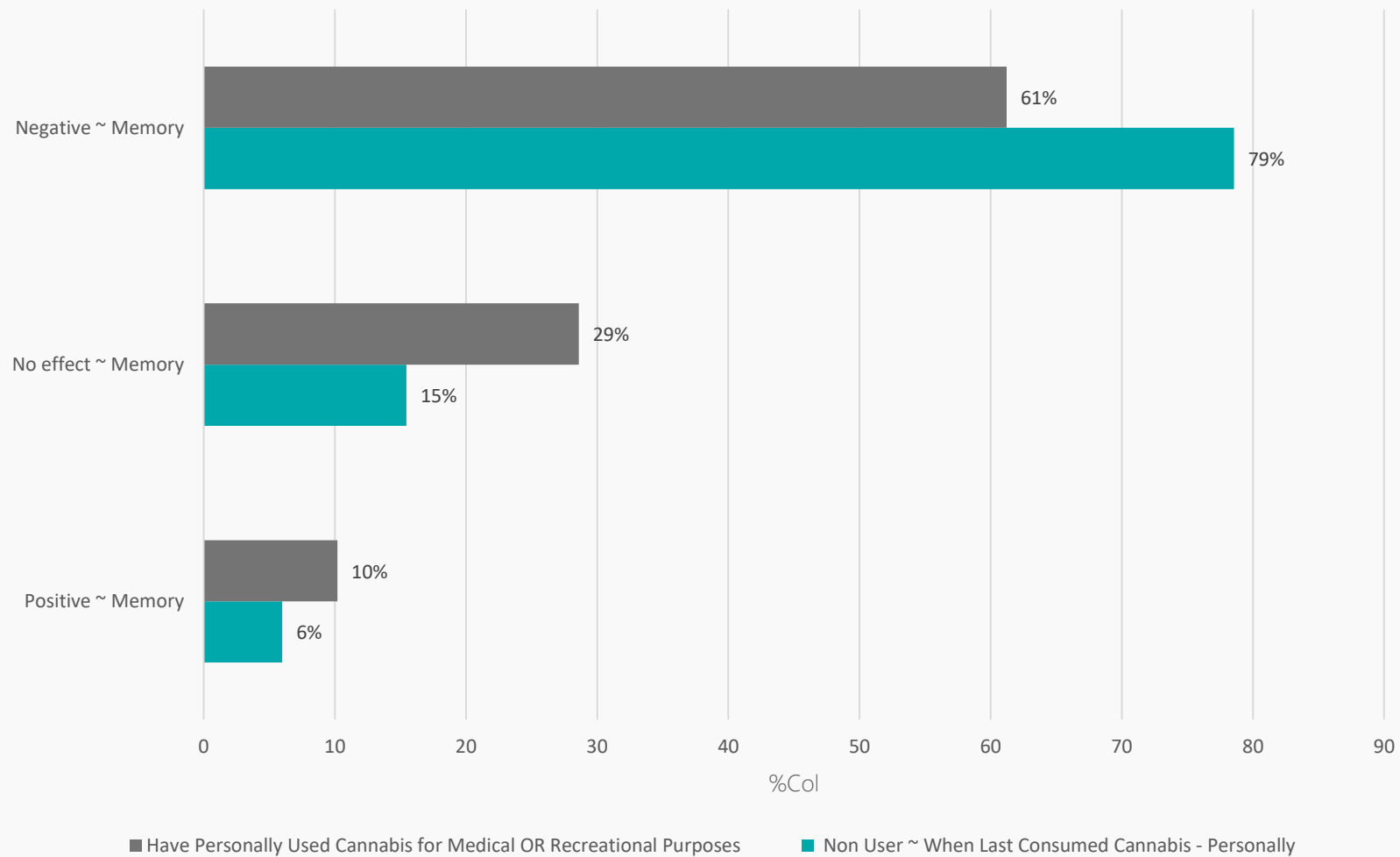
Social Life



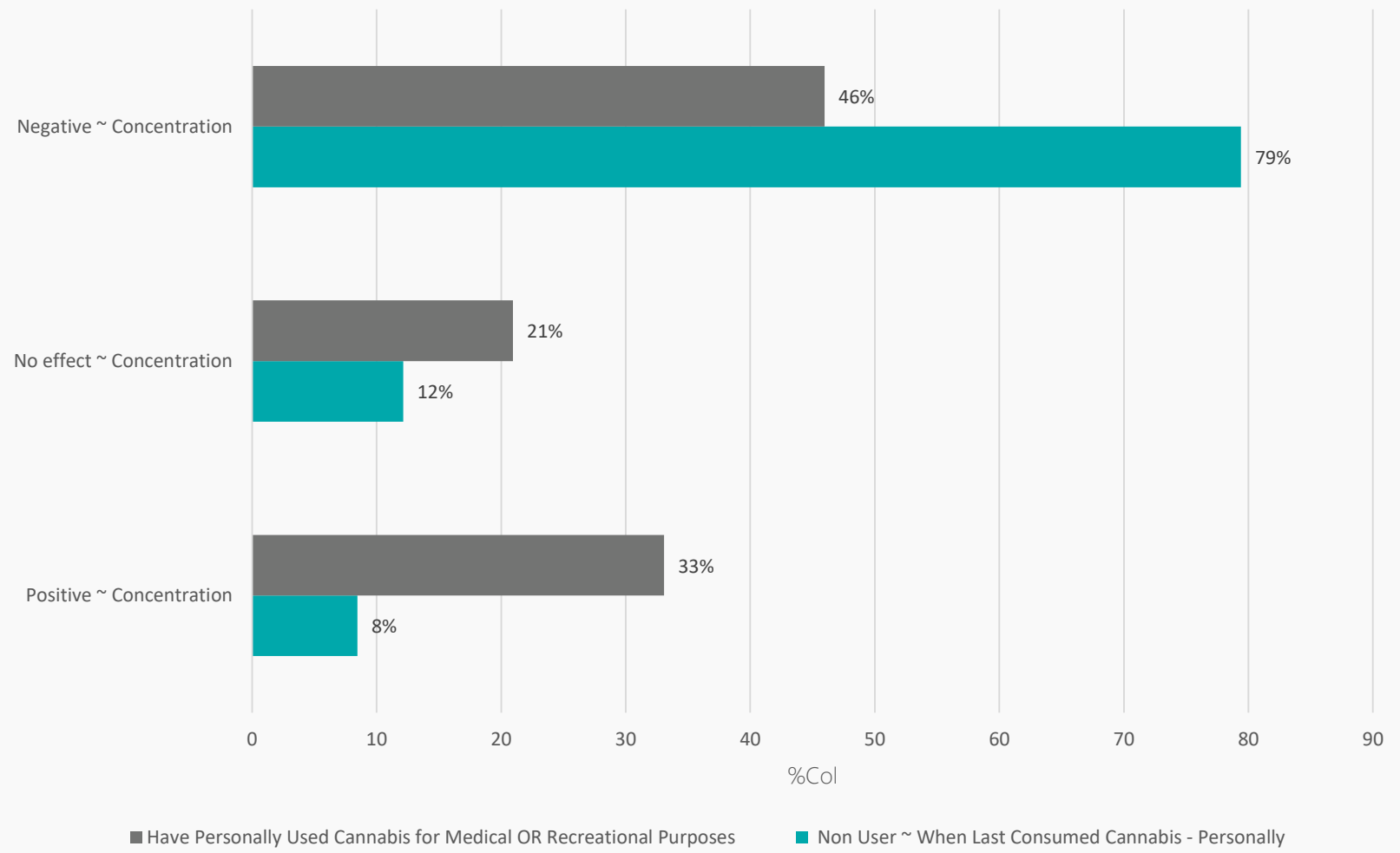
Mood



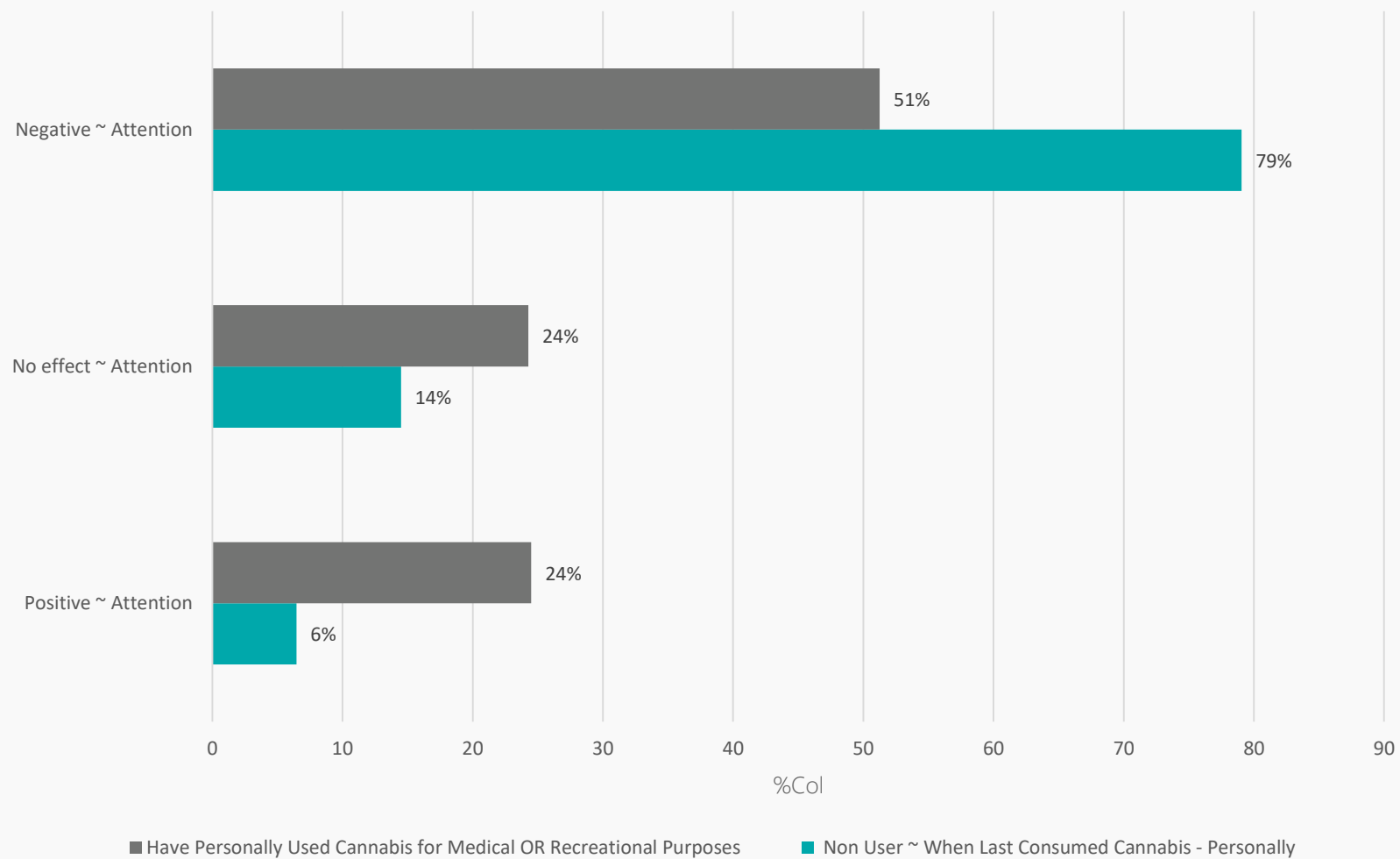
Memory



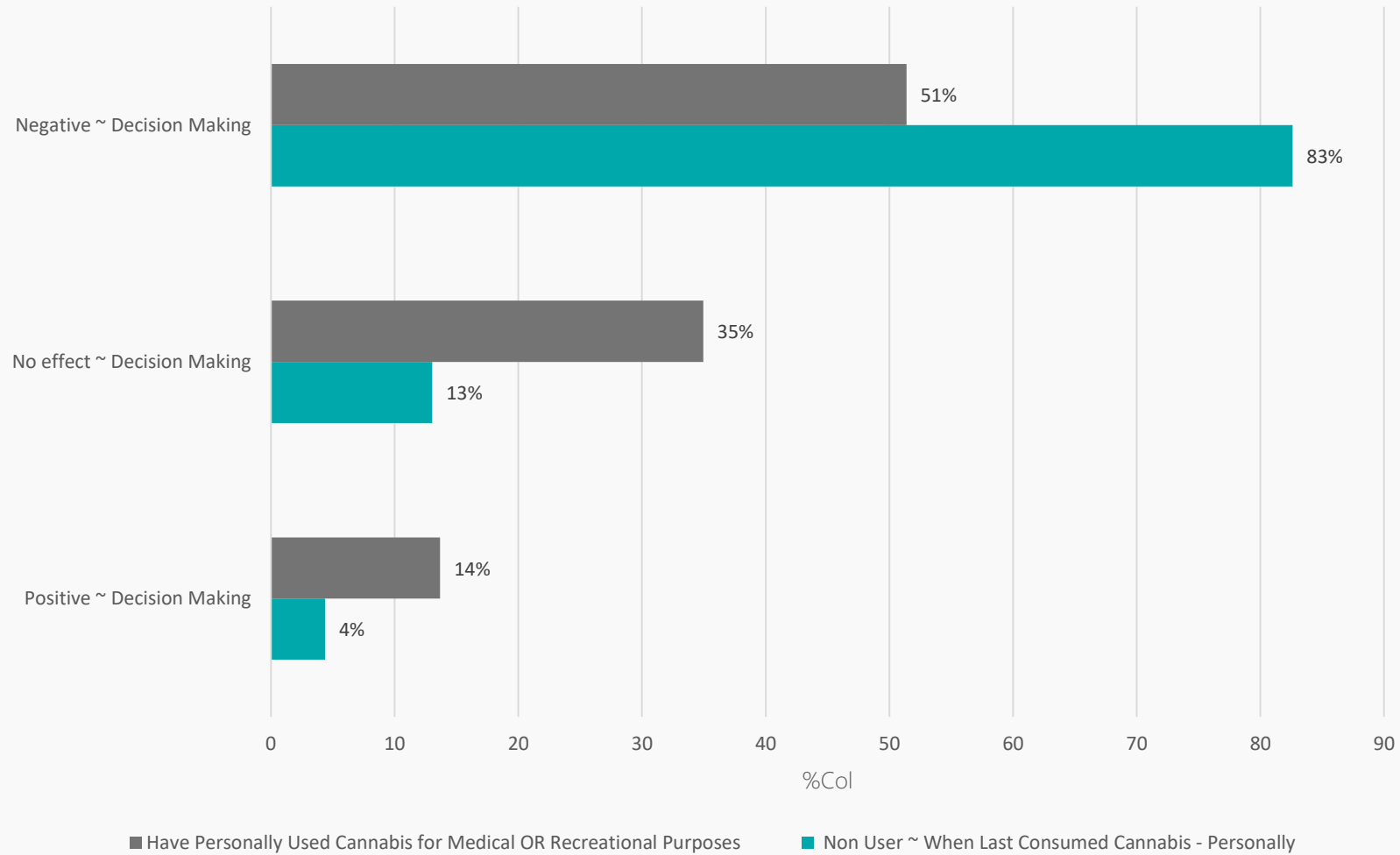
Concentration



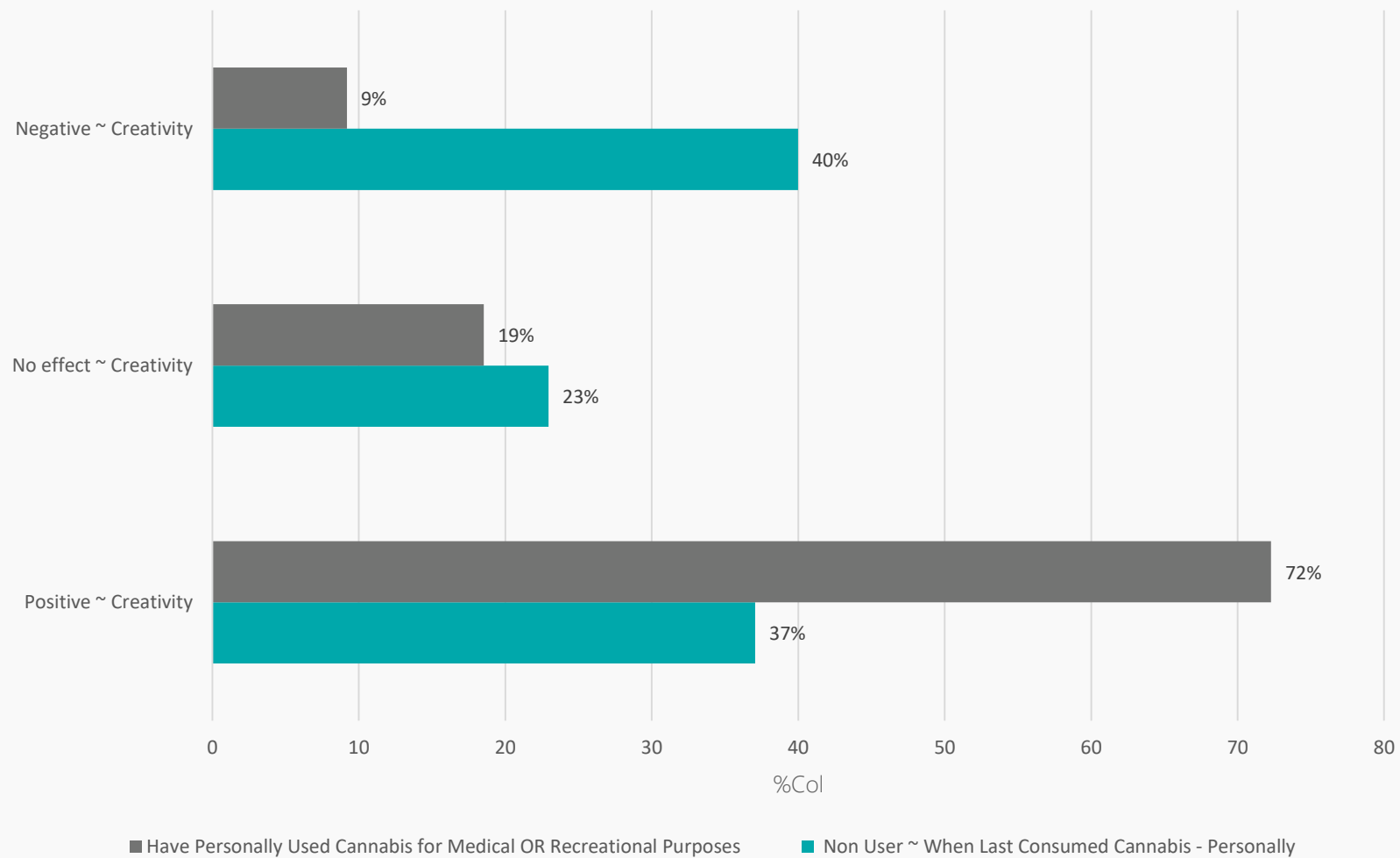
Attention



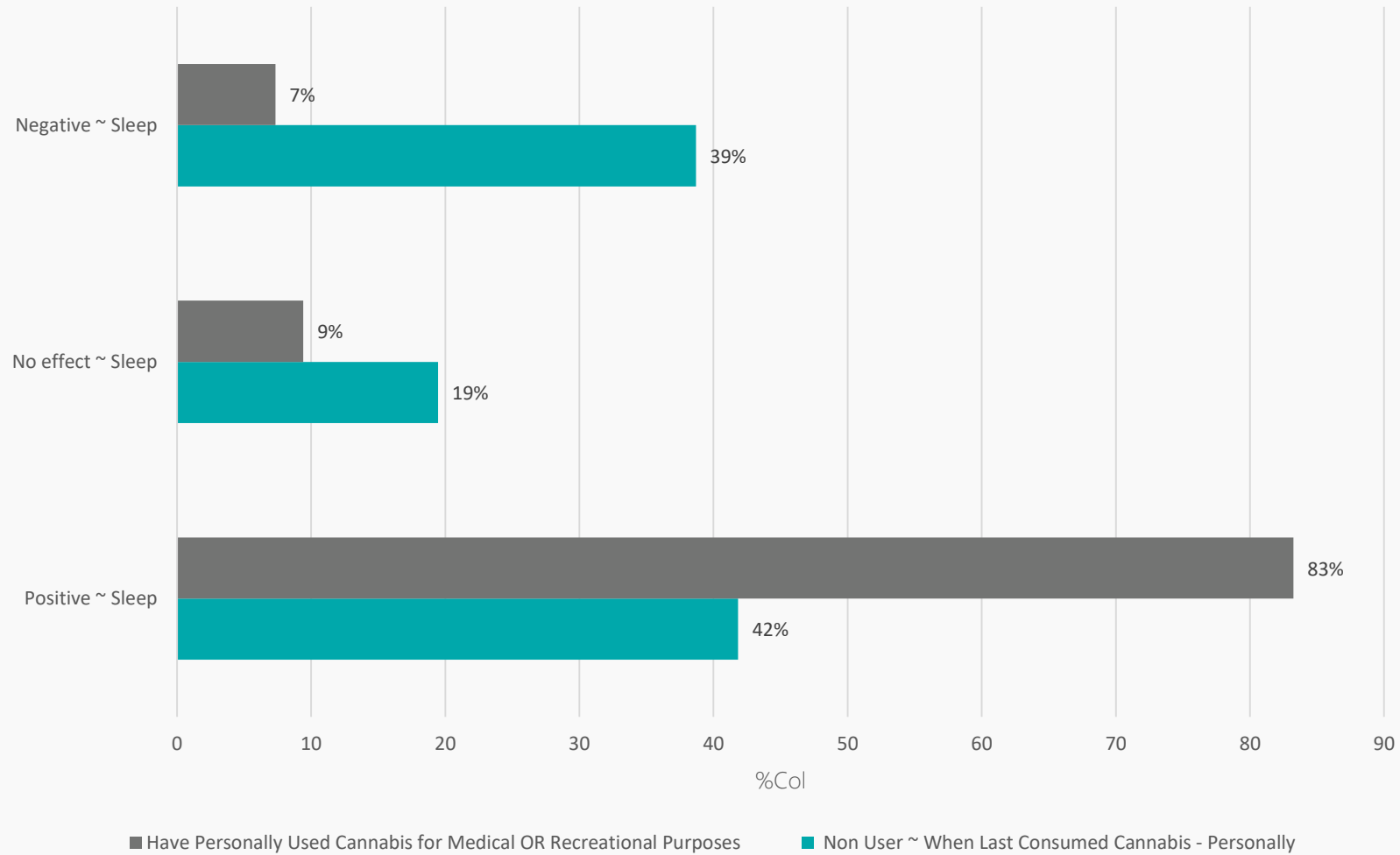
Decision Making



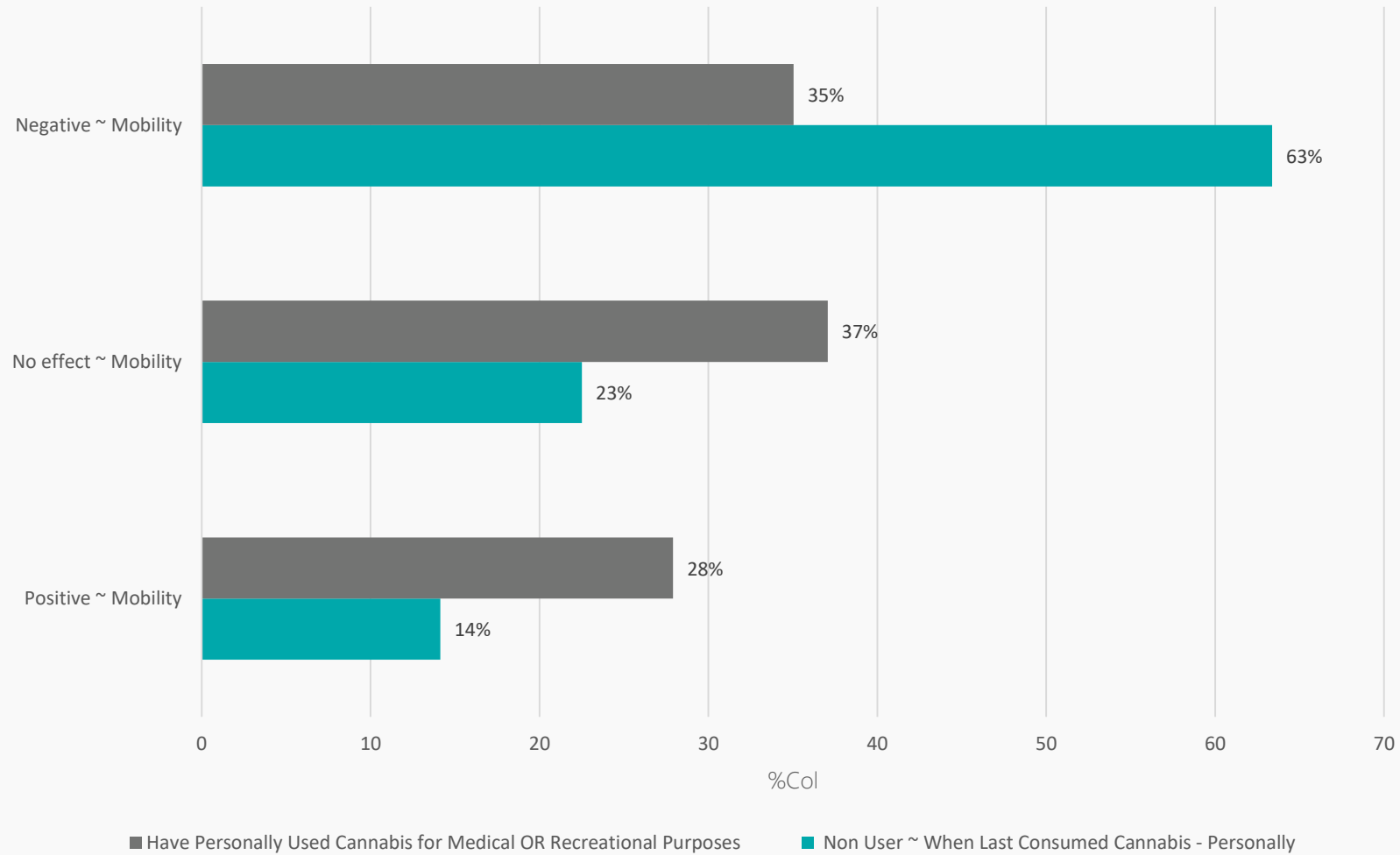
Creativity



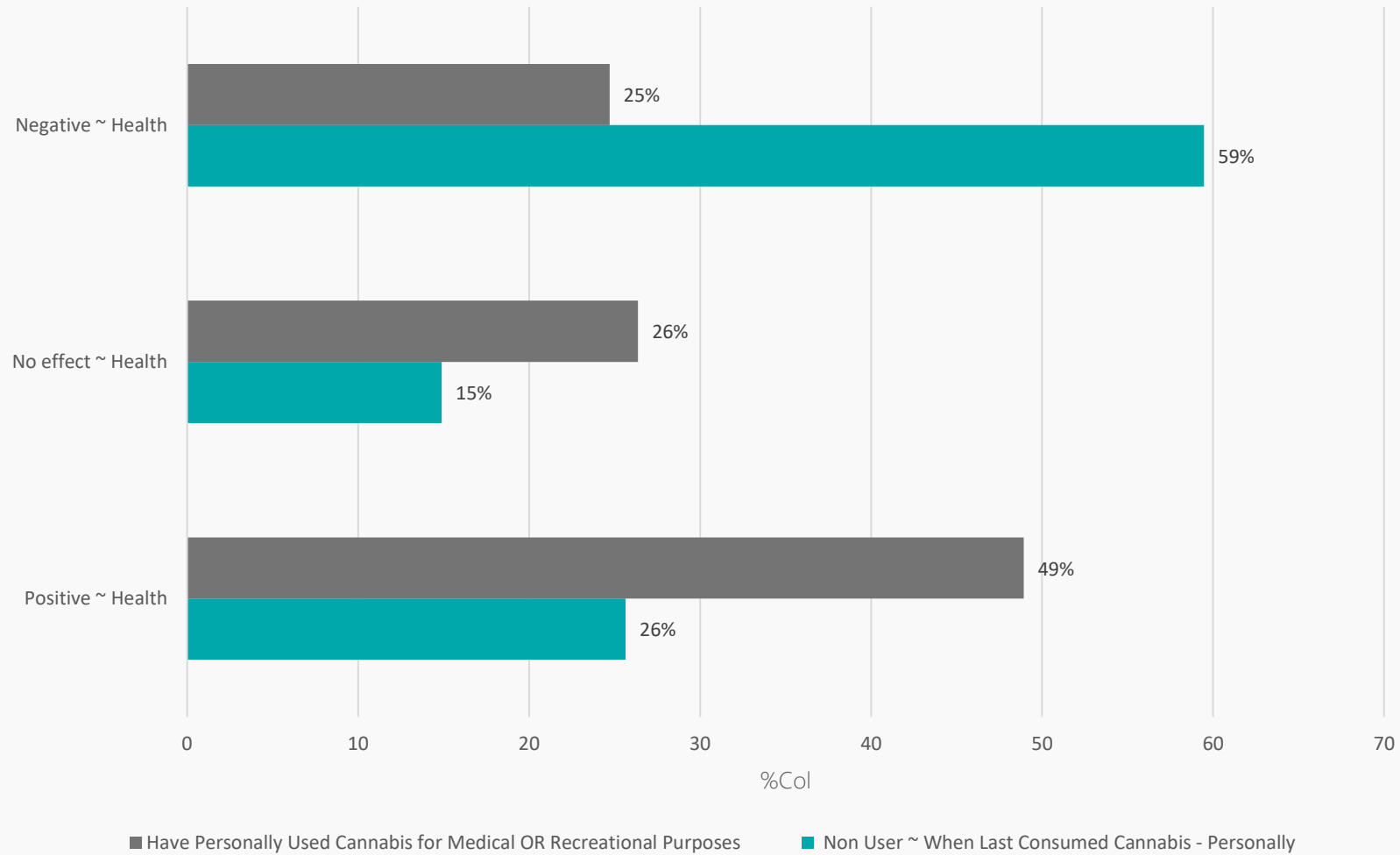
Sleep



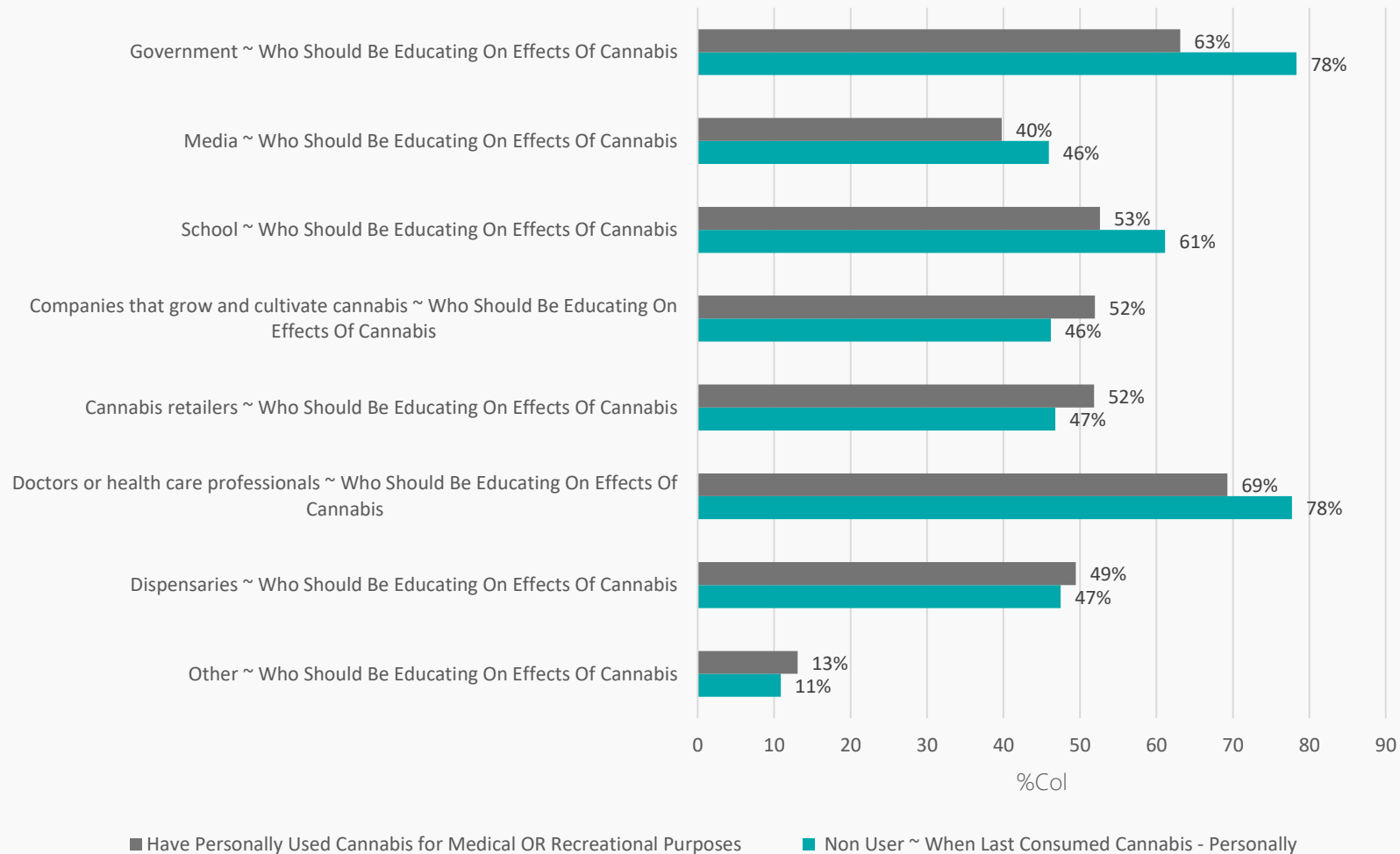
Mobility



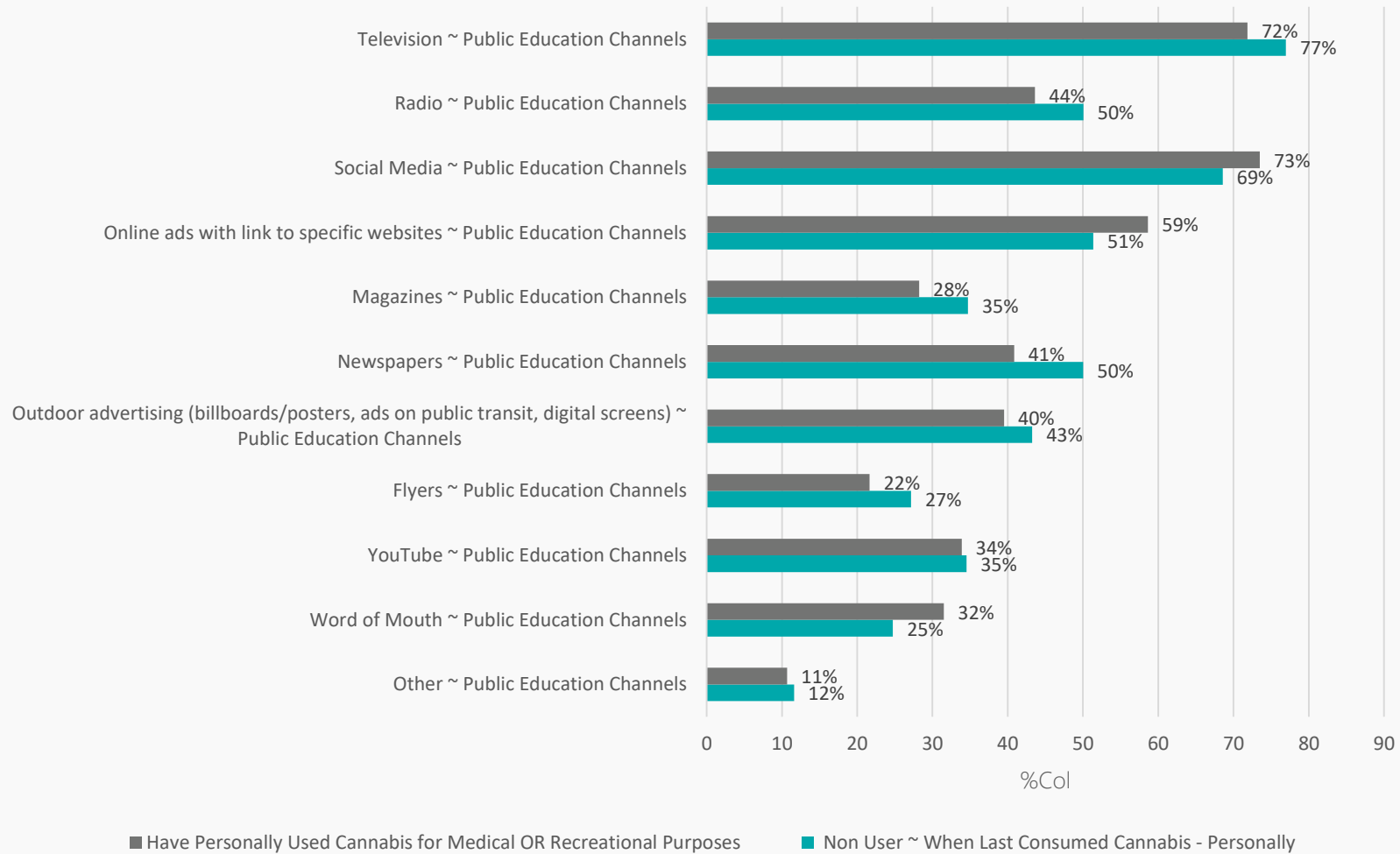
Health



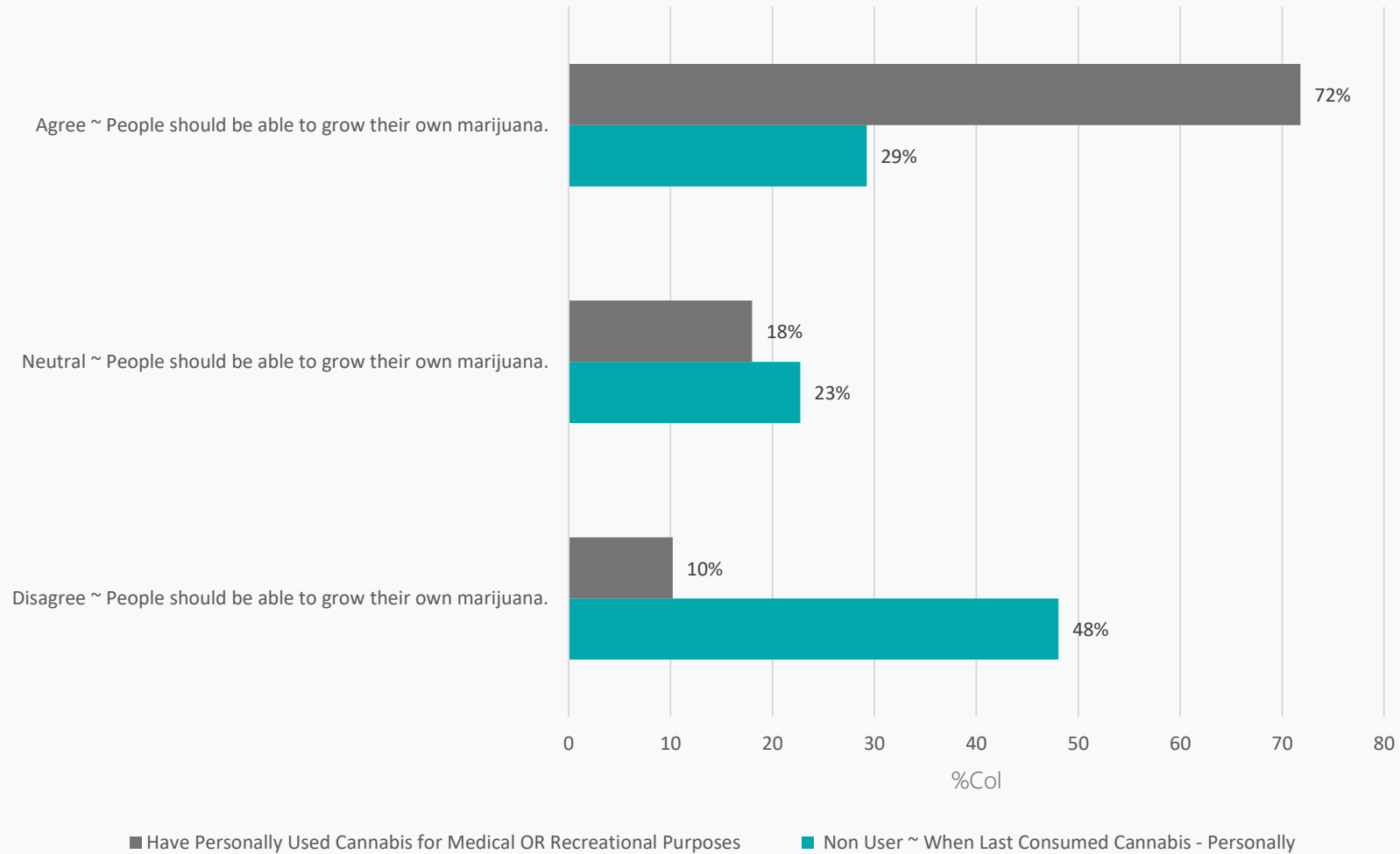
Who Should Be Educating On Effects Of Cannabis



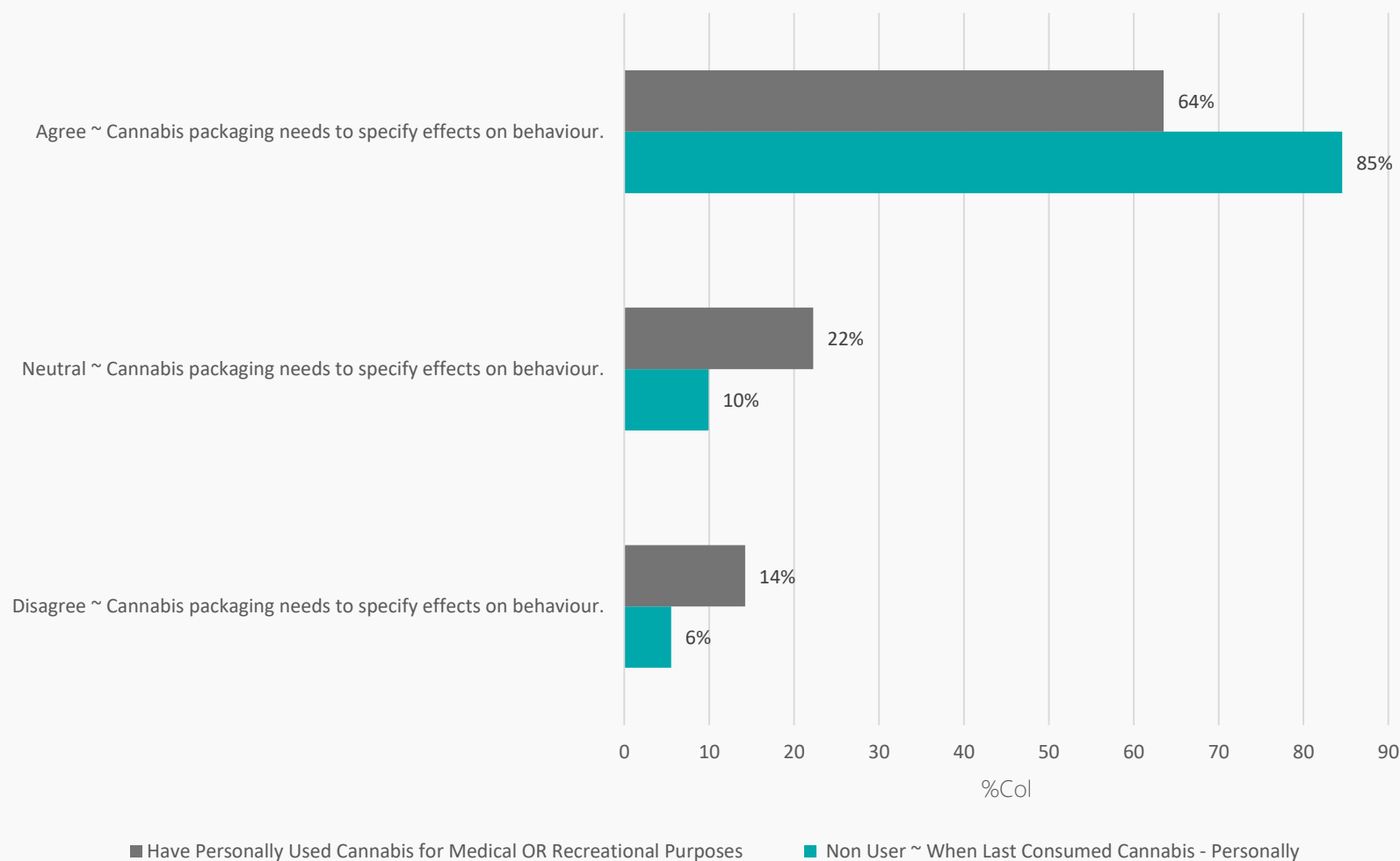
Public Education Channels



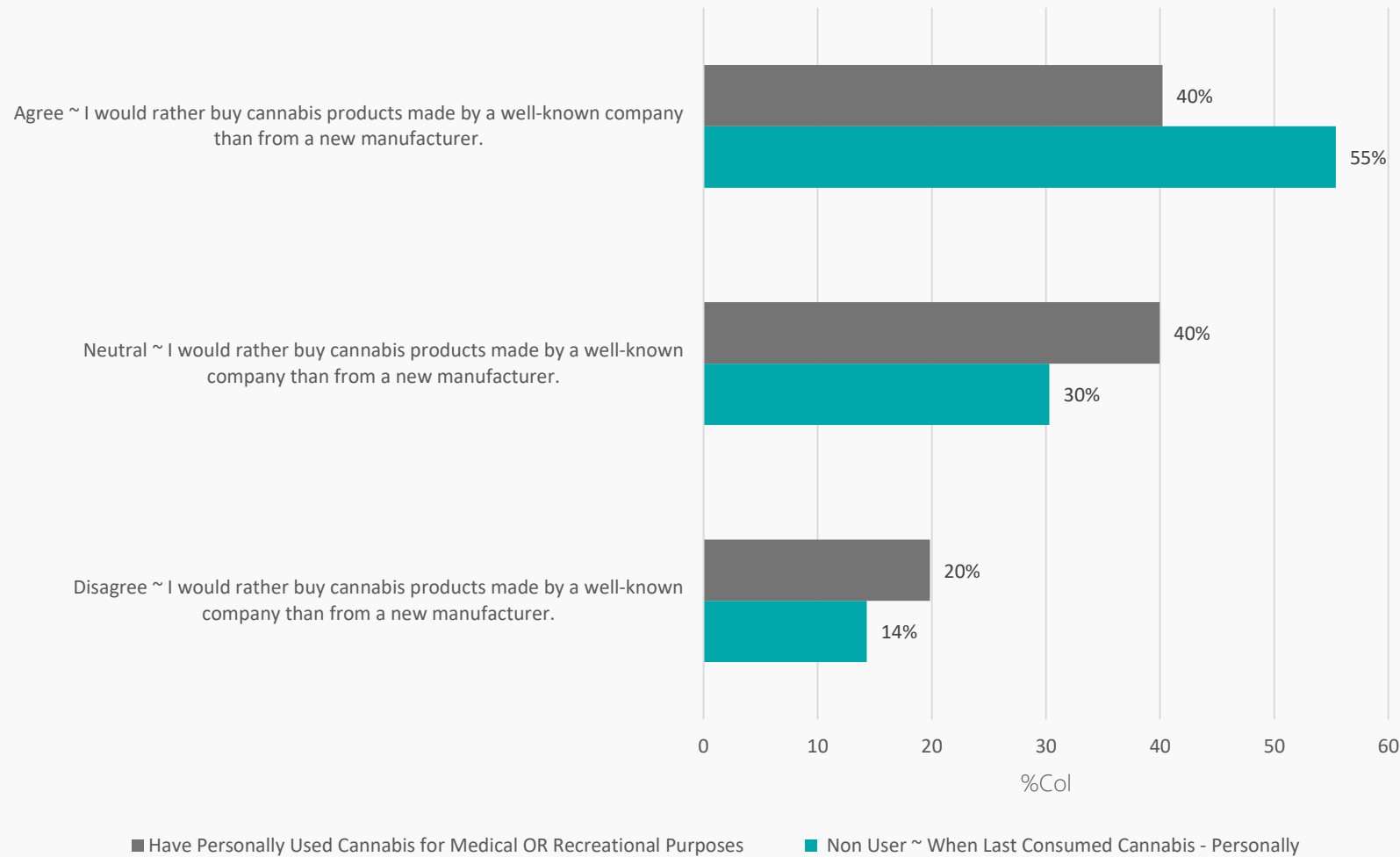
People should be able to grow their own marijuana.



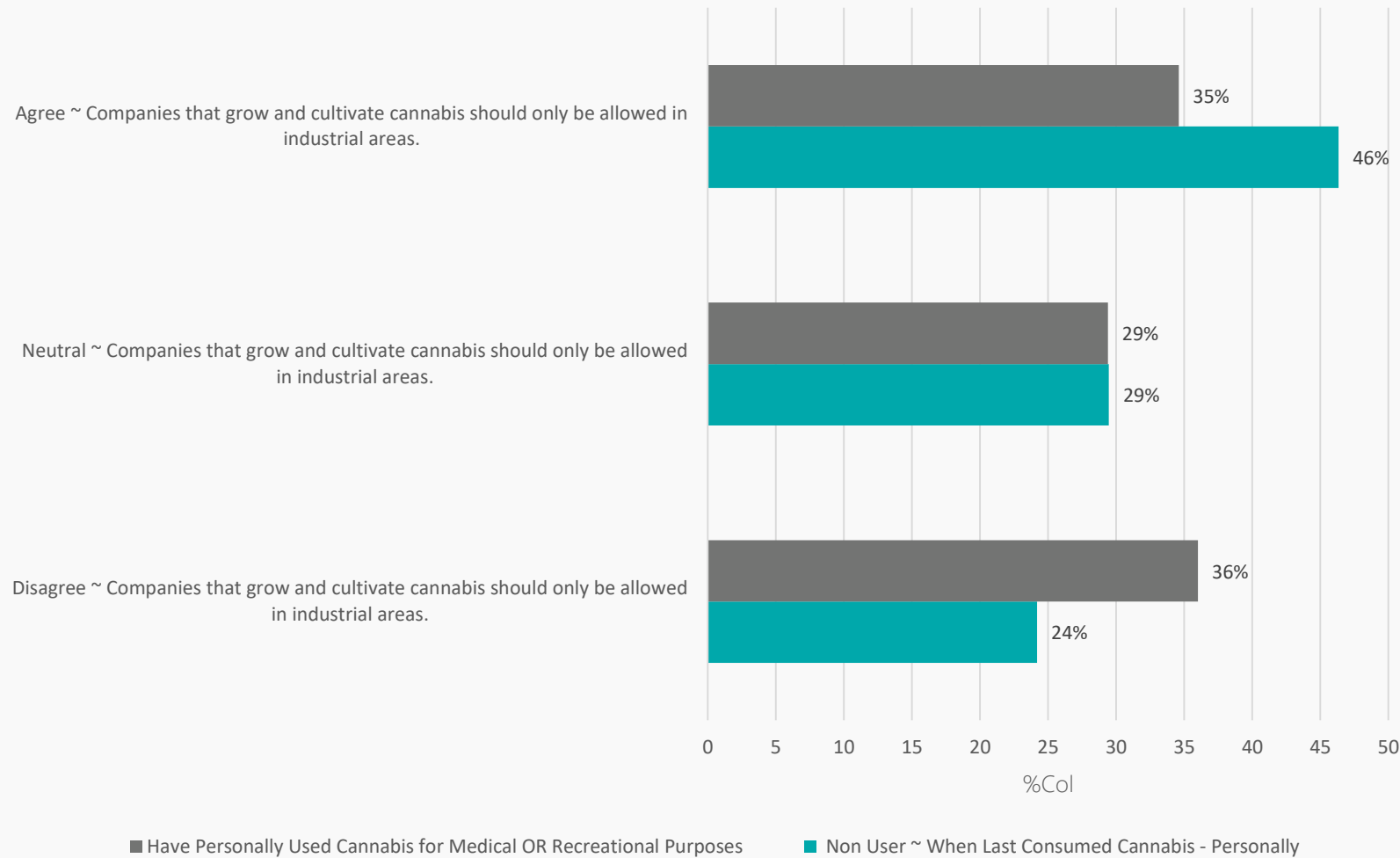
Cannabis packaging needs to specify effects on behaviour.



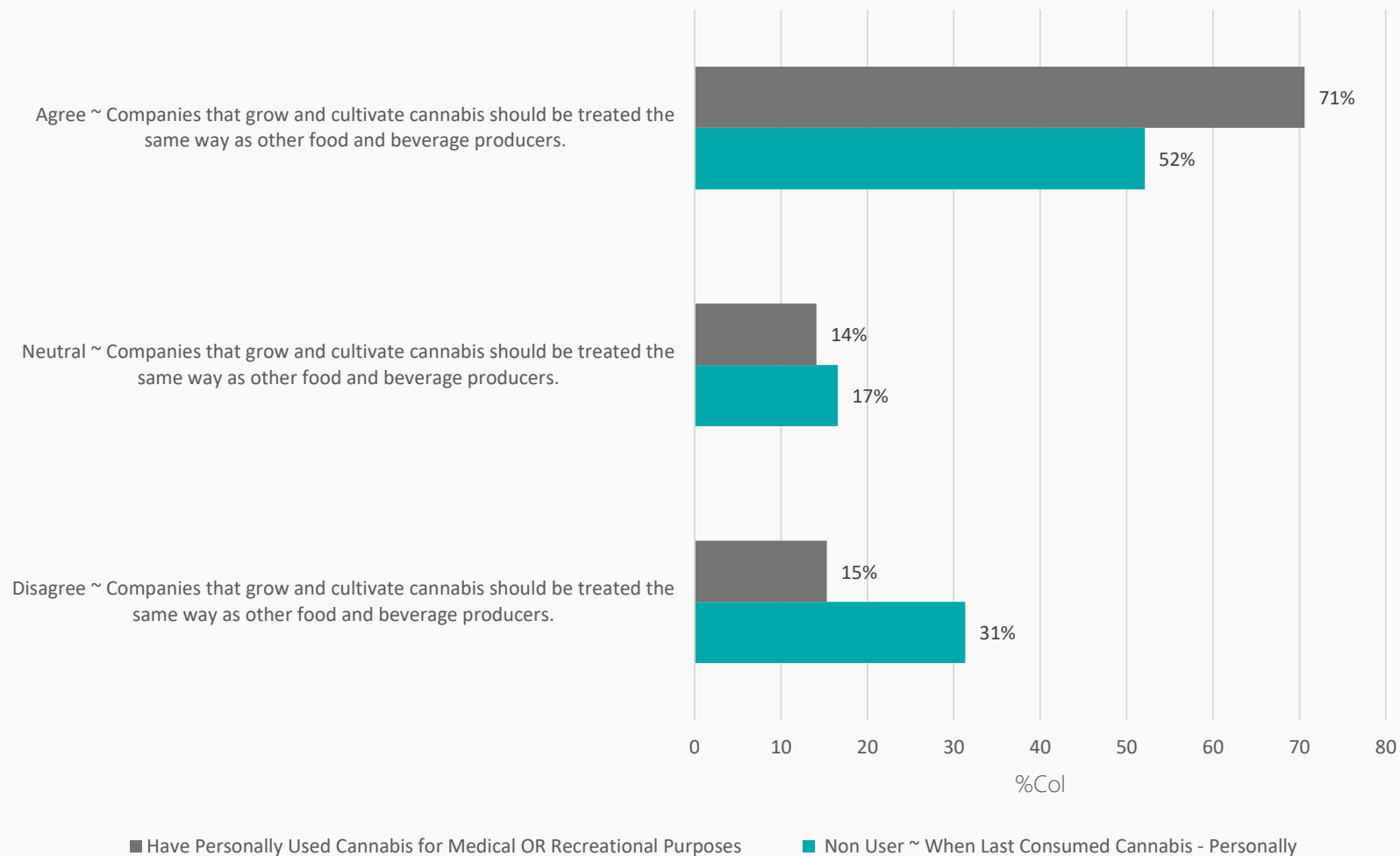
I would rather buy cannabis products made by a well-known company than from a new manufacturer.



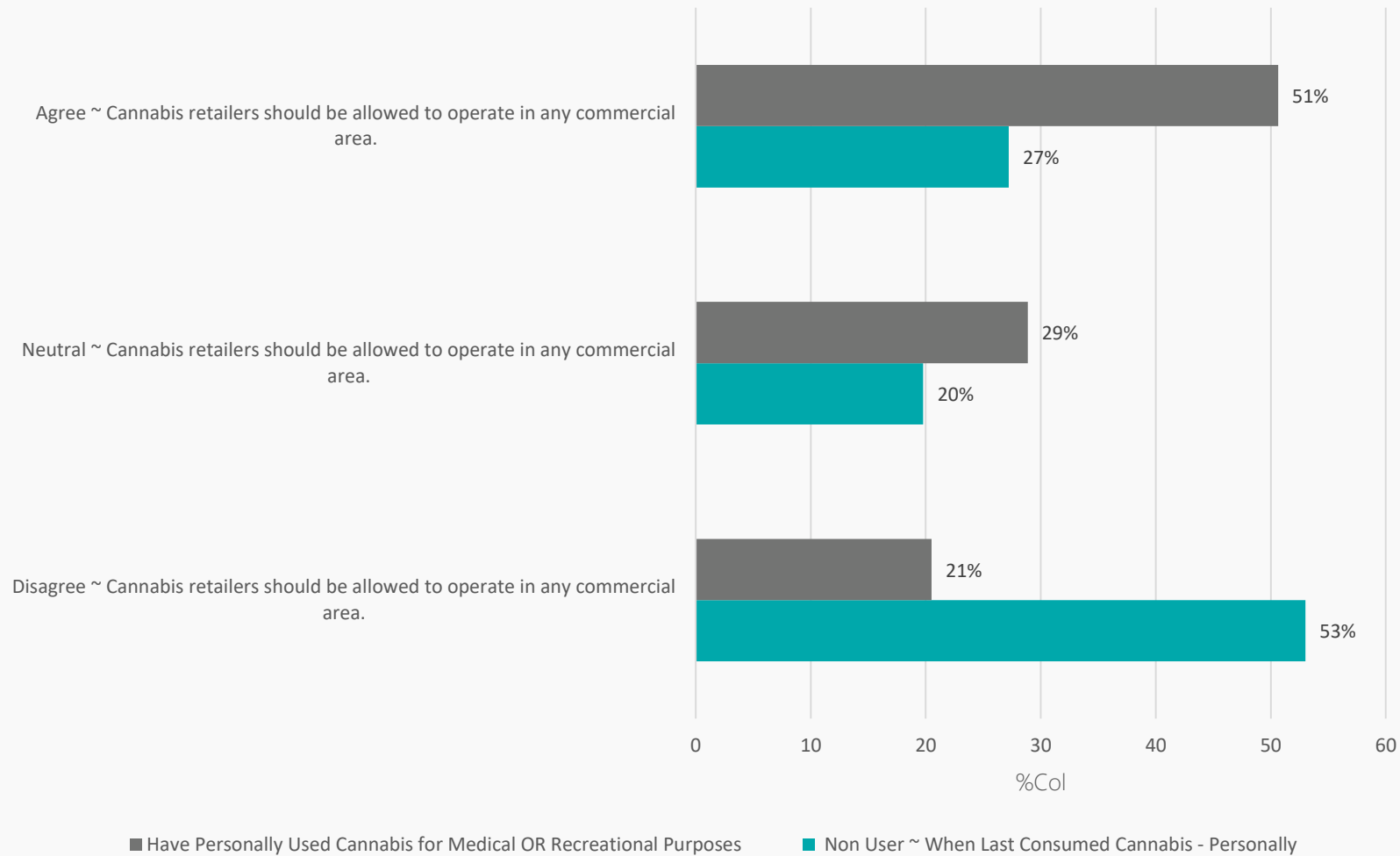
Companies that grow and cultivate cannabis should only be allowed in industrial areas.



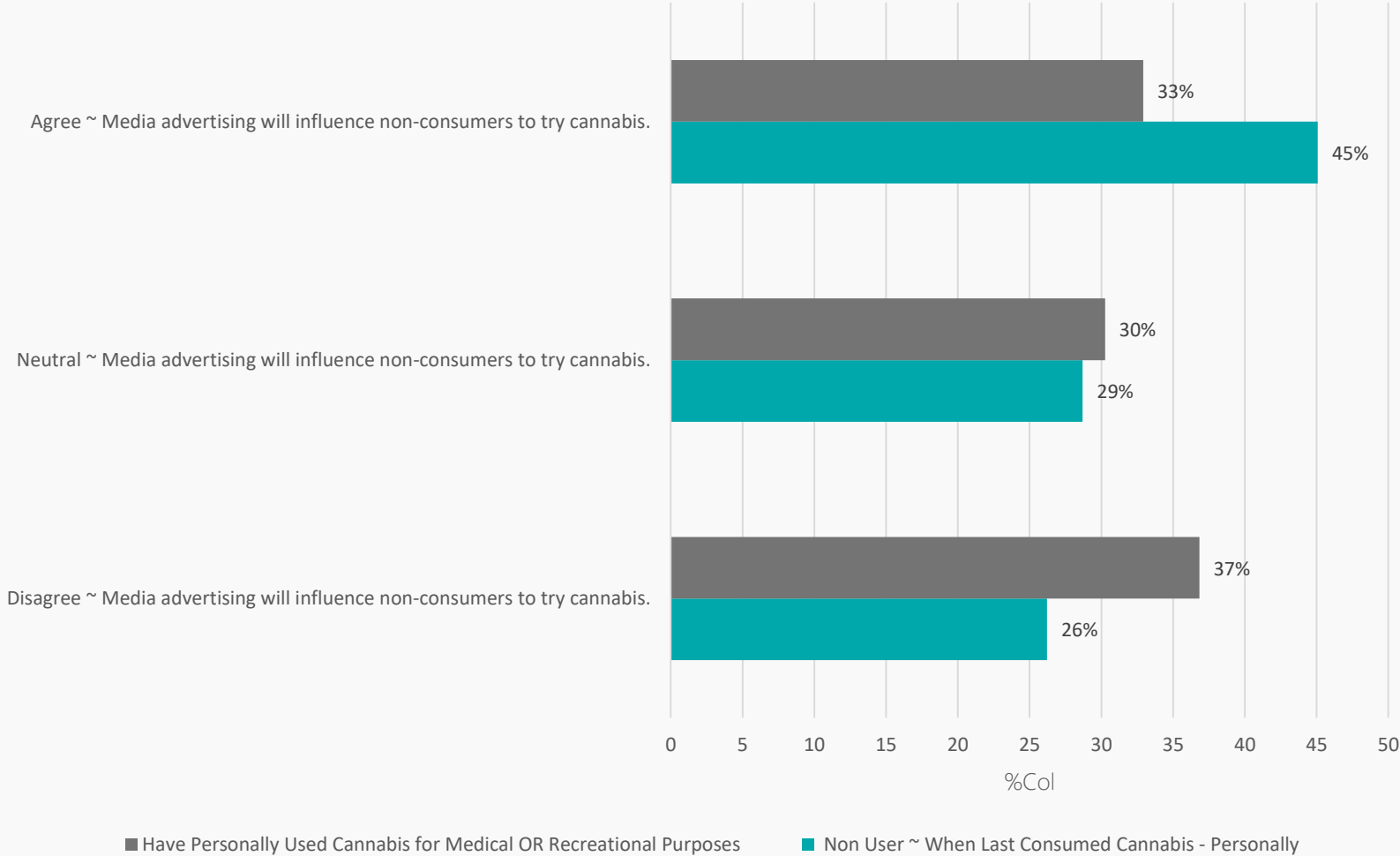
Companies that grow and cultivate cannabis should be treated the same way as other food and beverage producers.



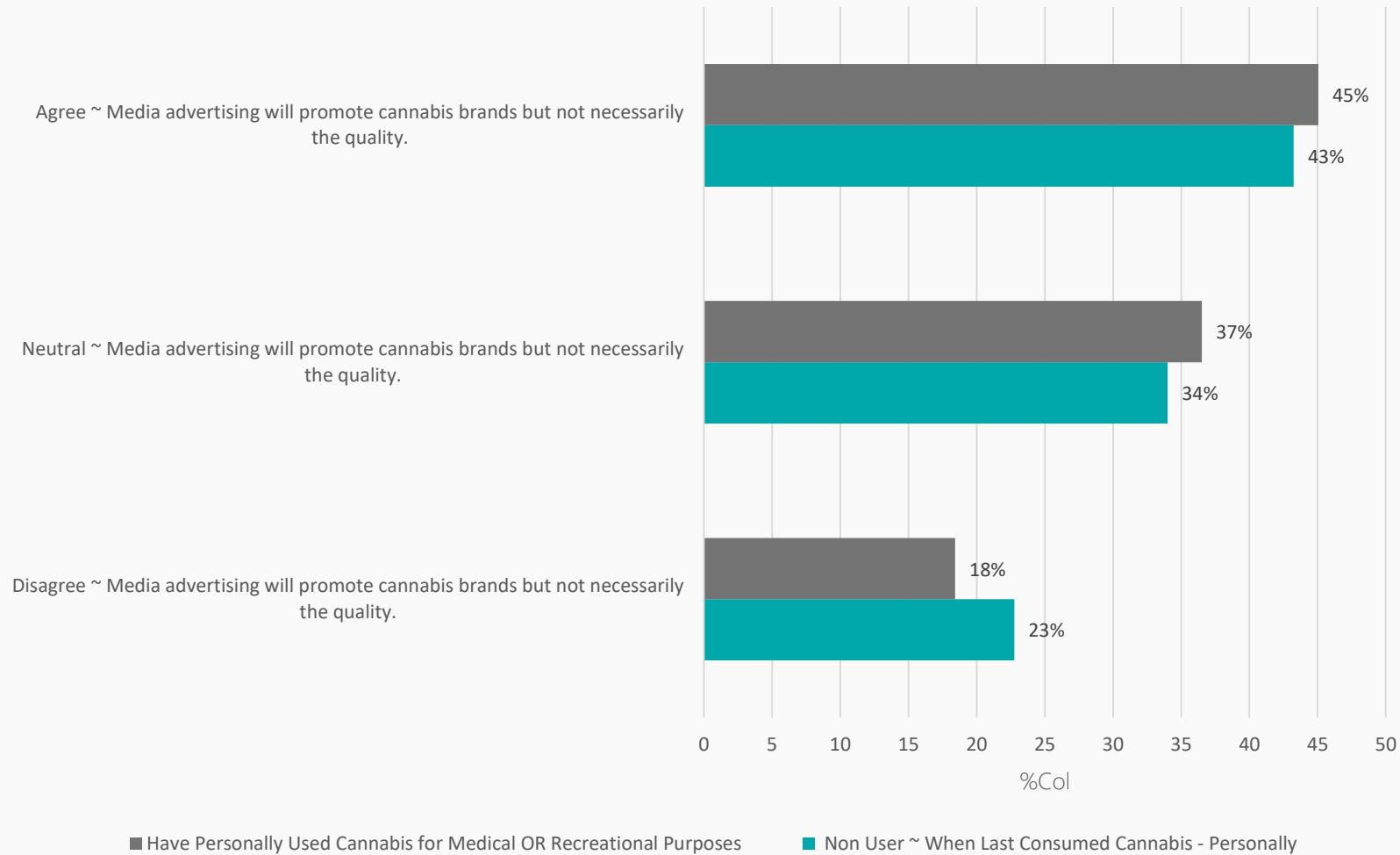
Cannabis retailers should be allowed to operate in any commercial area.



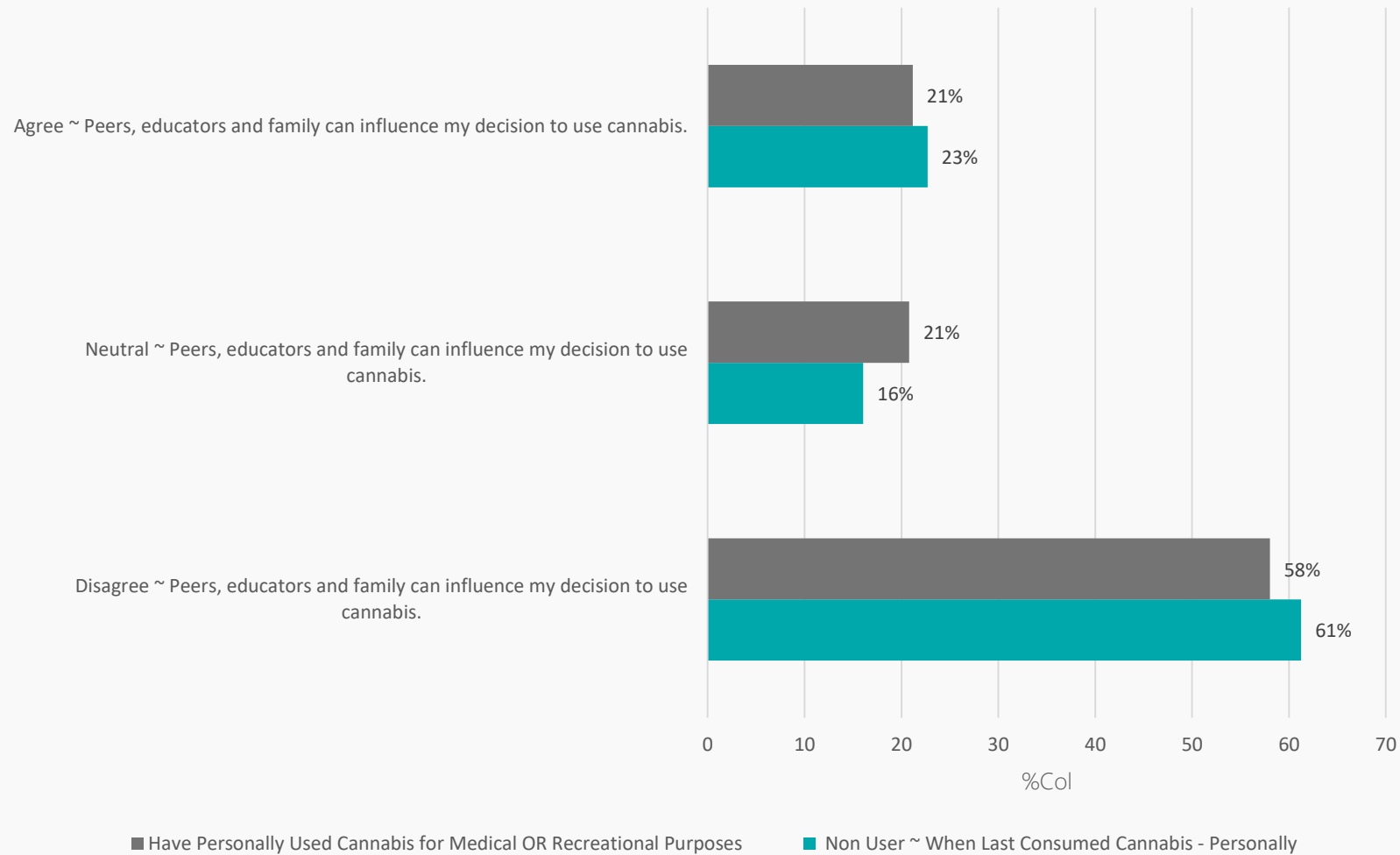
Media advertising will influence non-consumers to try cannabis.



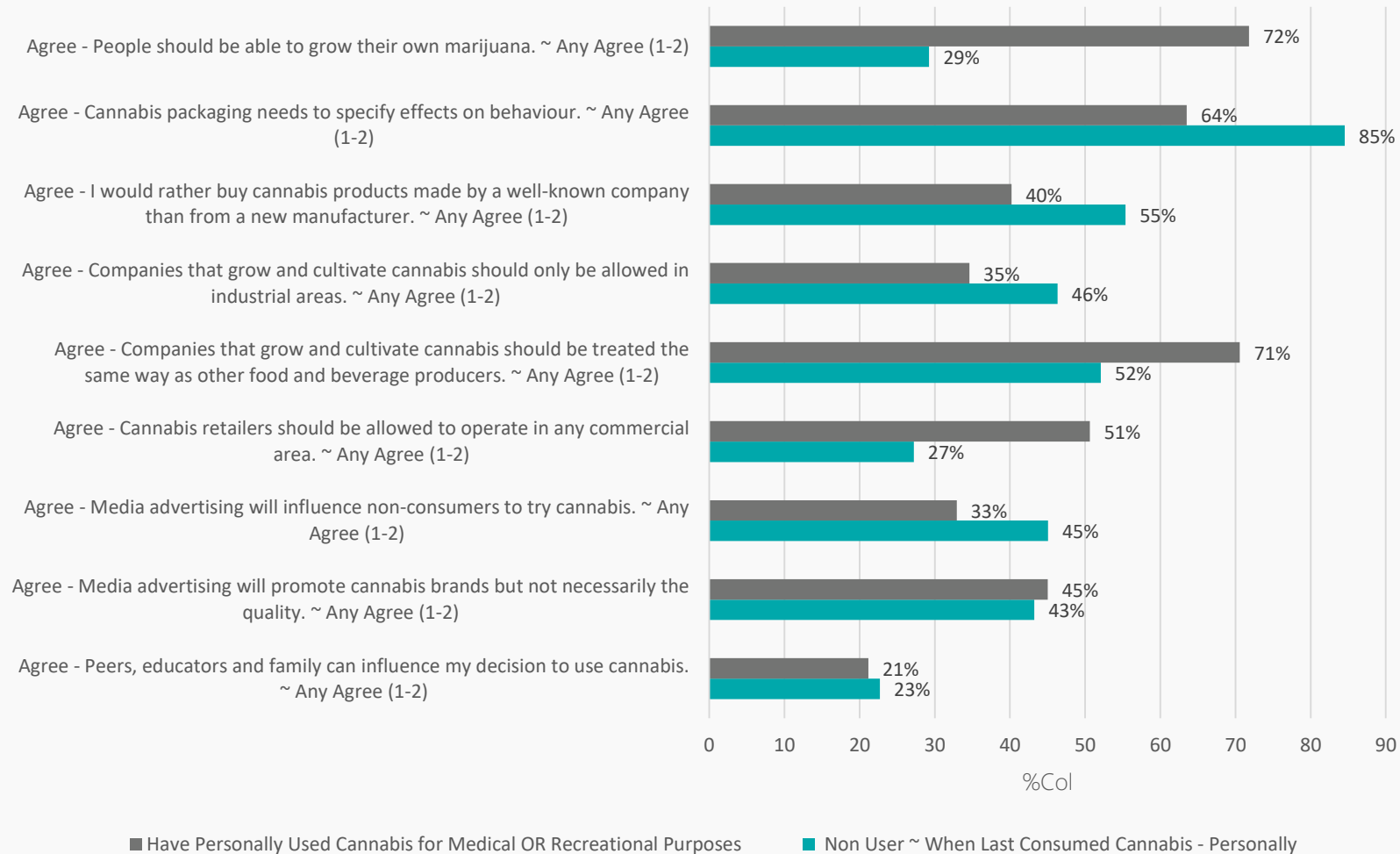
Media advertising will promote cannabis brands but not necessarily the quality.



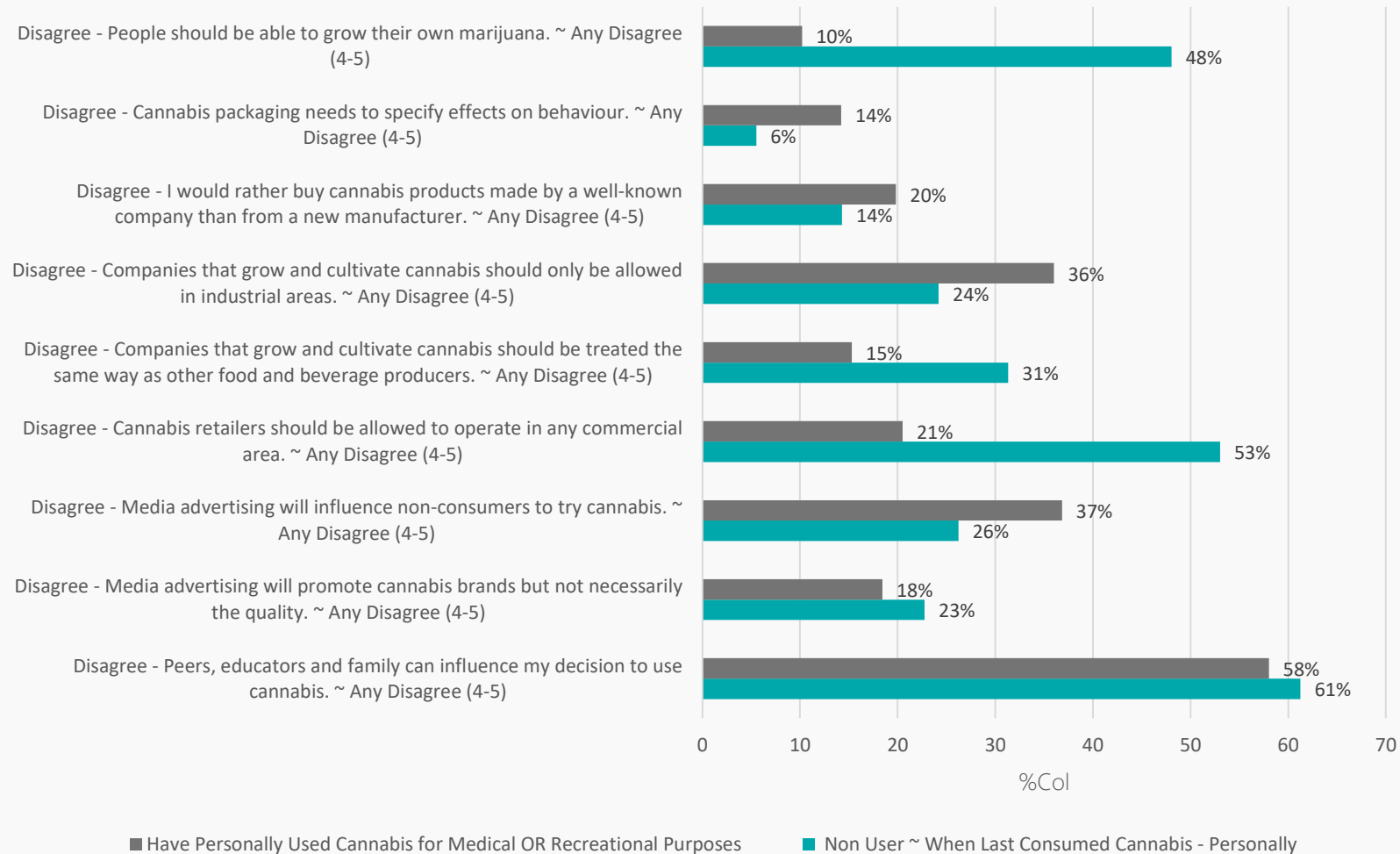
Peers, educators and family can influence my decision to use cannabis.



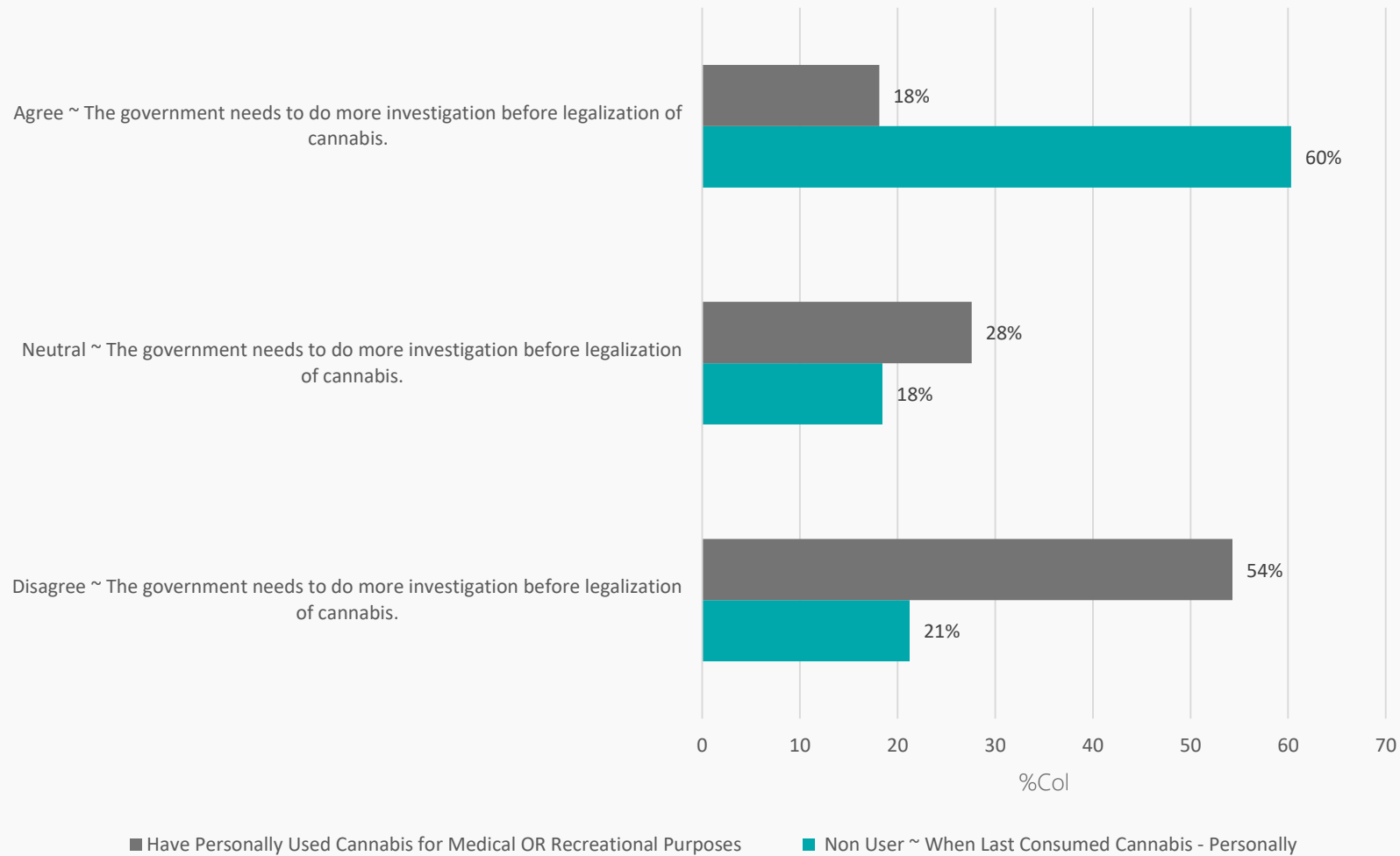
Any Agree (1-2)



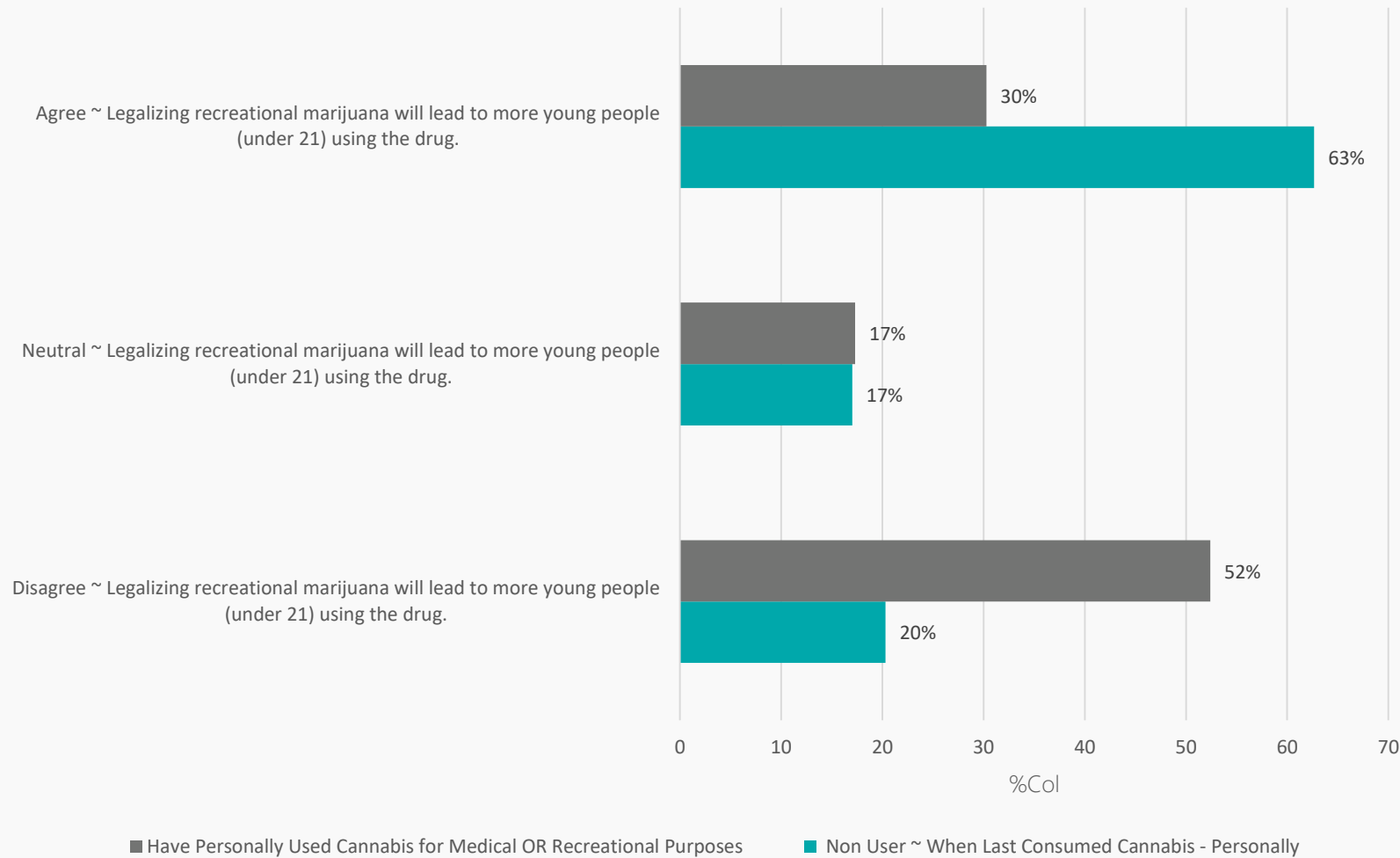
Any Disagree (4-5)



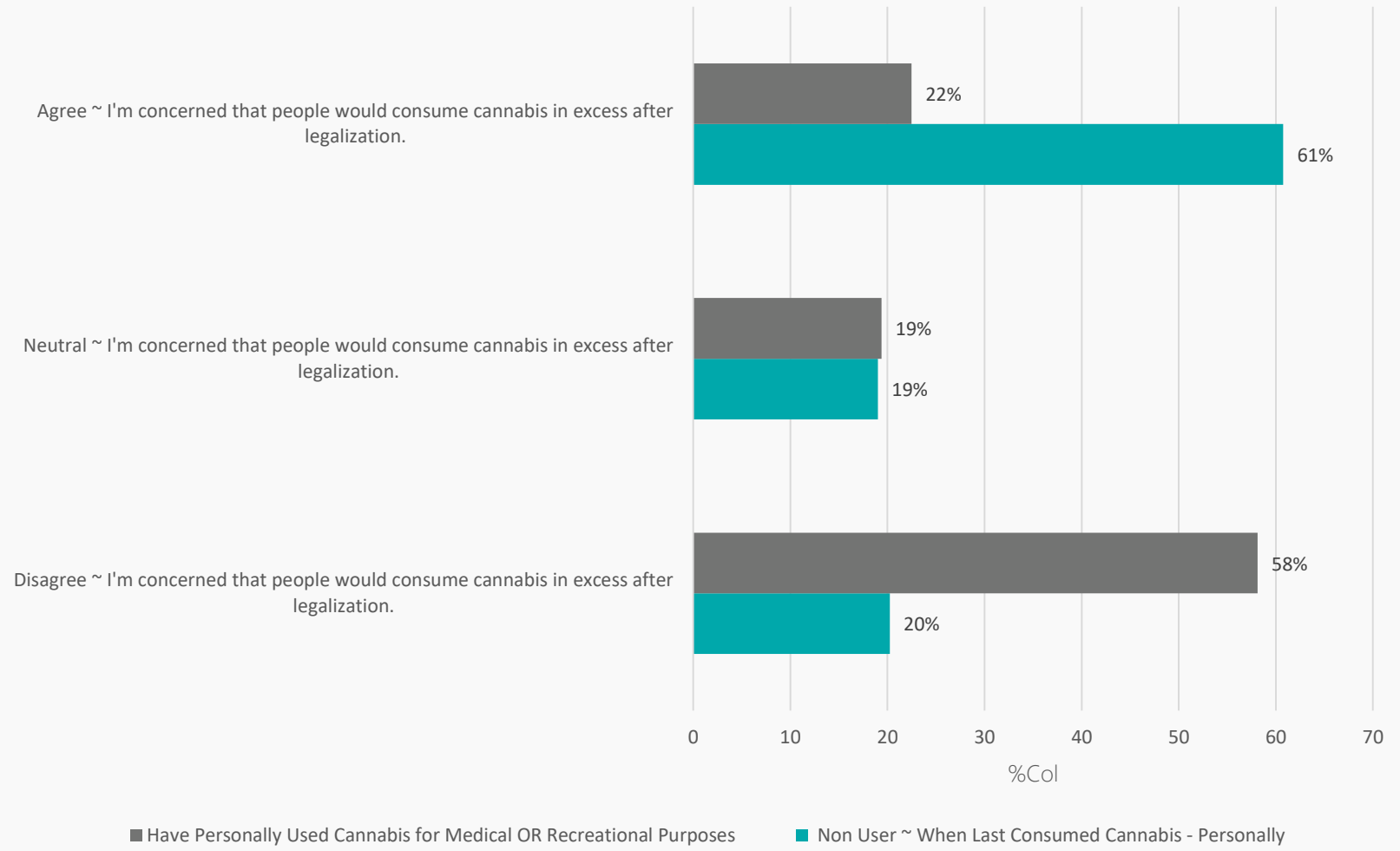
The government needs to do more investigation before legalization of cannabis.



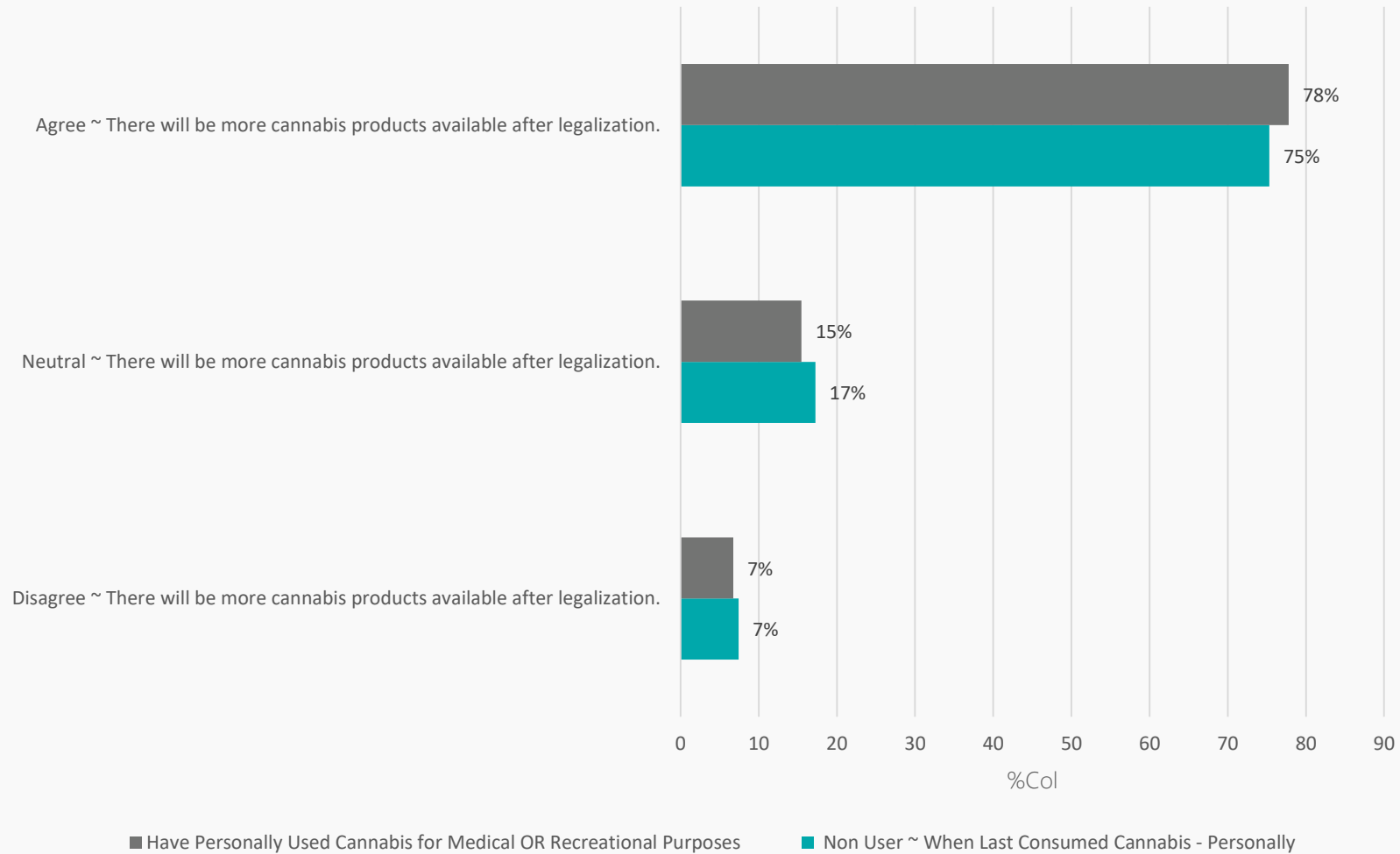
Legalizing recreational marijuana will lead to more young people (under 21) using the drug.



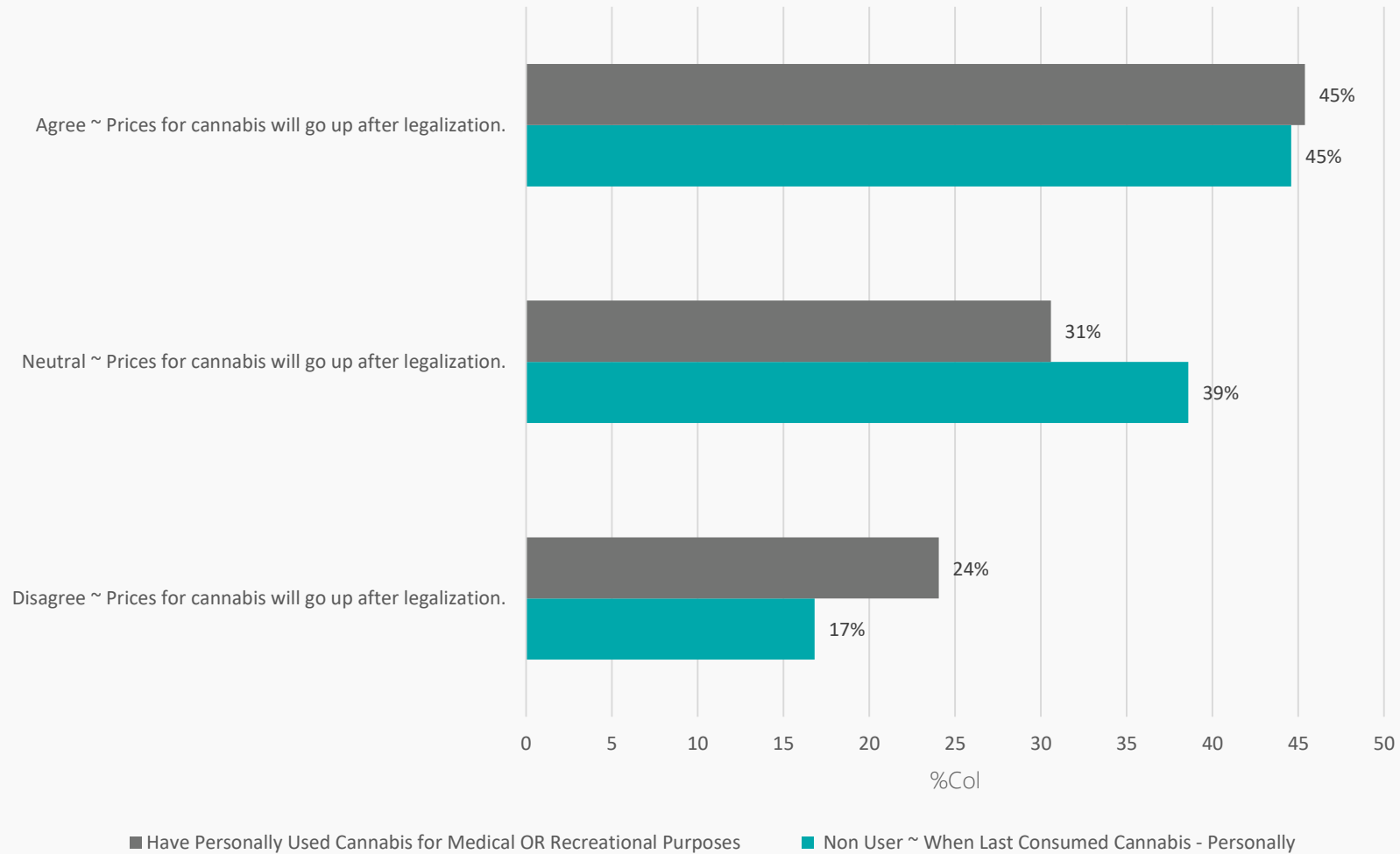
I'm concerned that people would consume cannabis in excess after legalization.



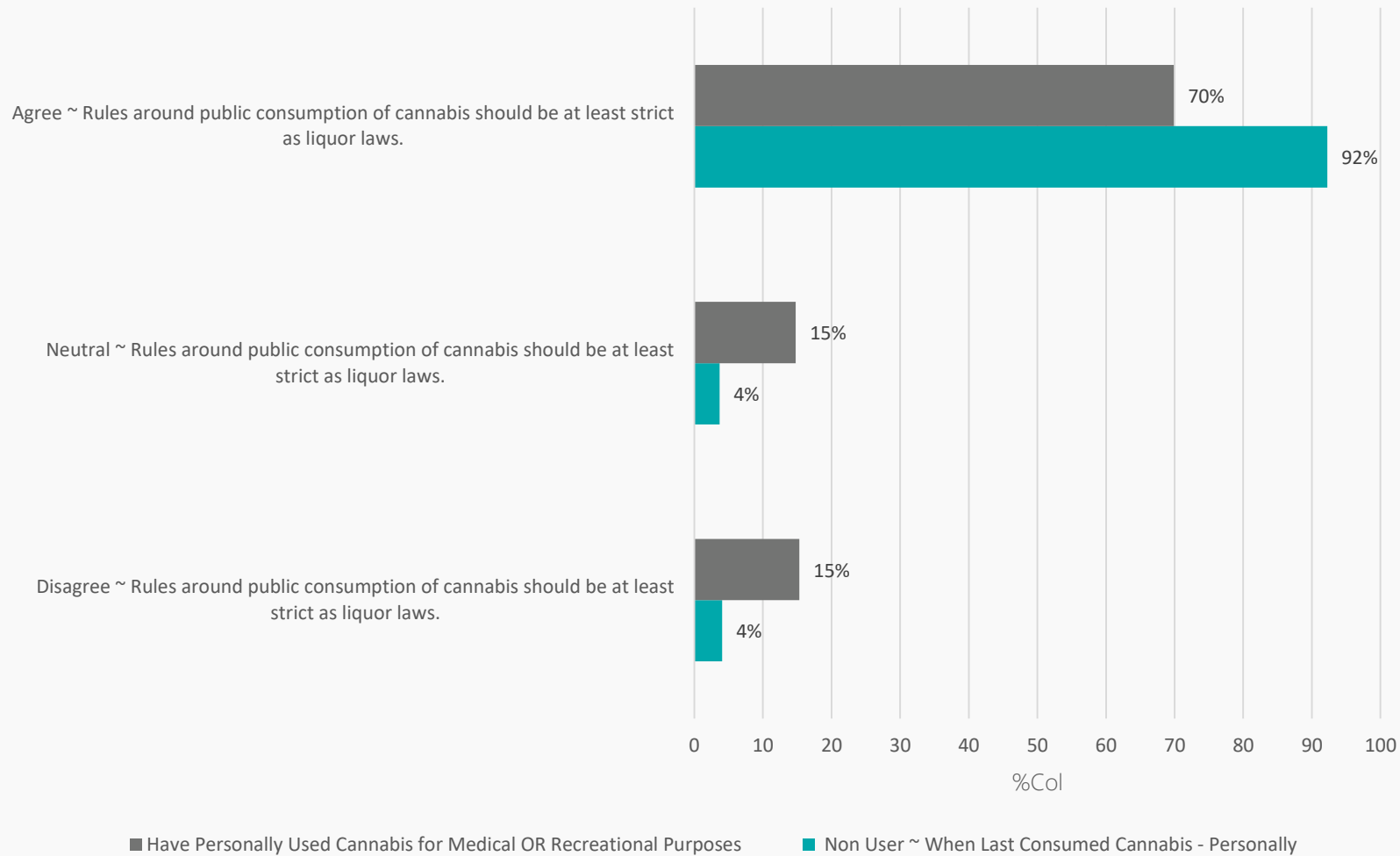
There will be more cannabis products available after legalization.



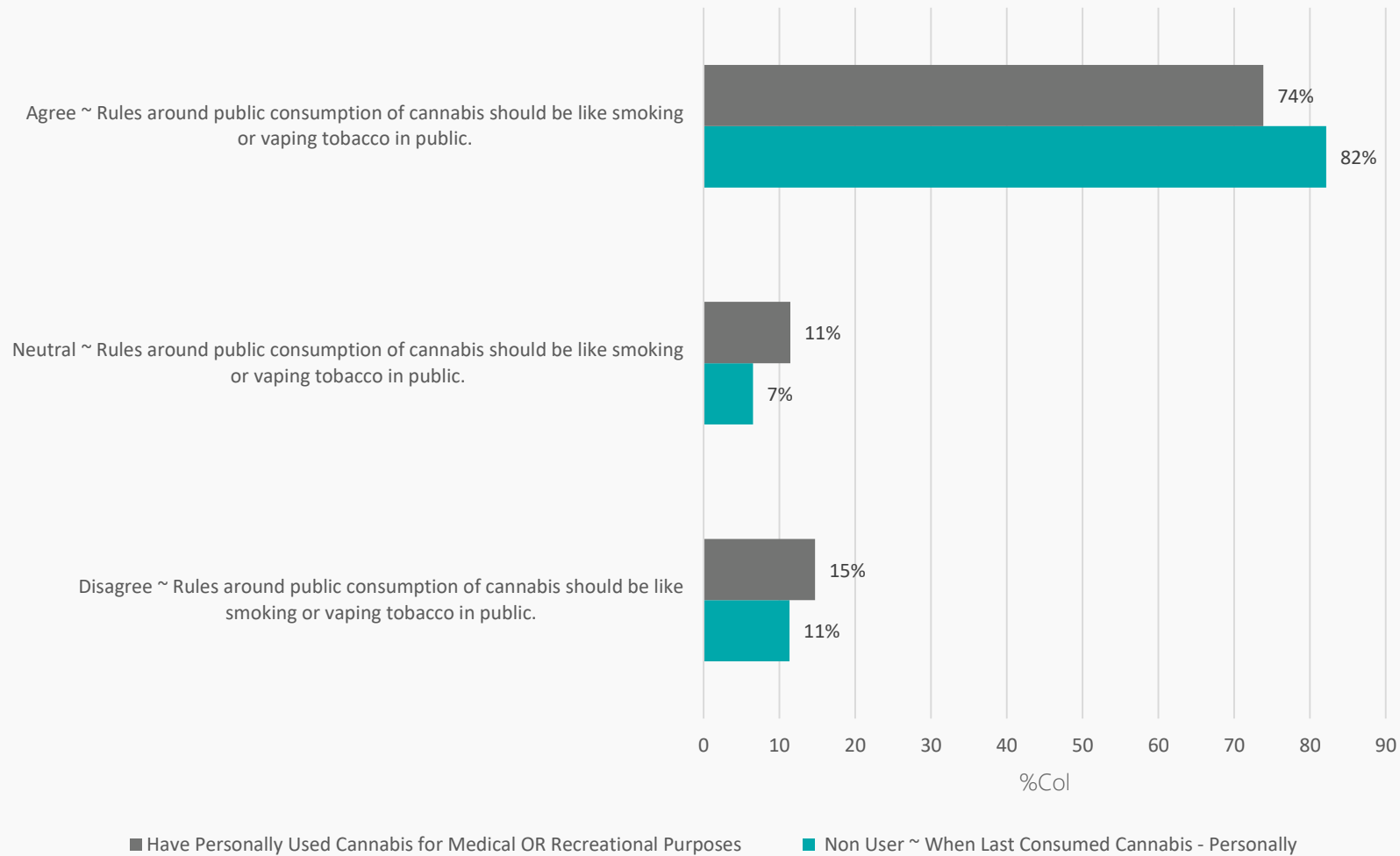
Prices for cannabis will go up after legalization.



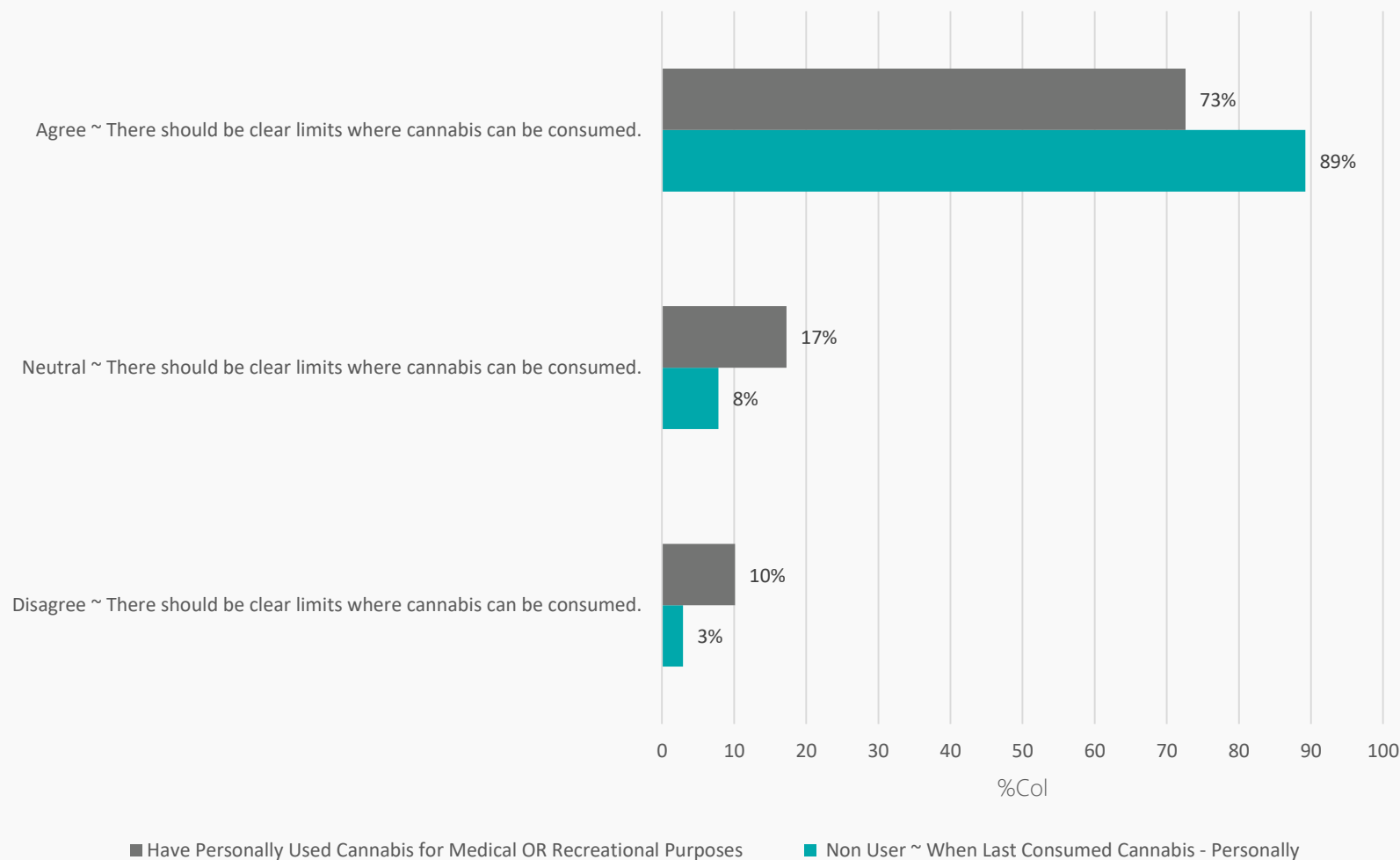
Rules around public consumption of cannabis should be at least strict as liquor laws.



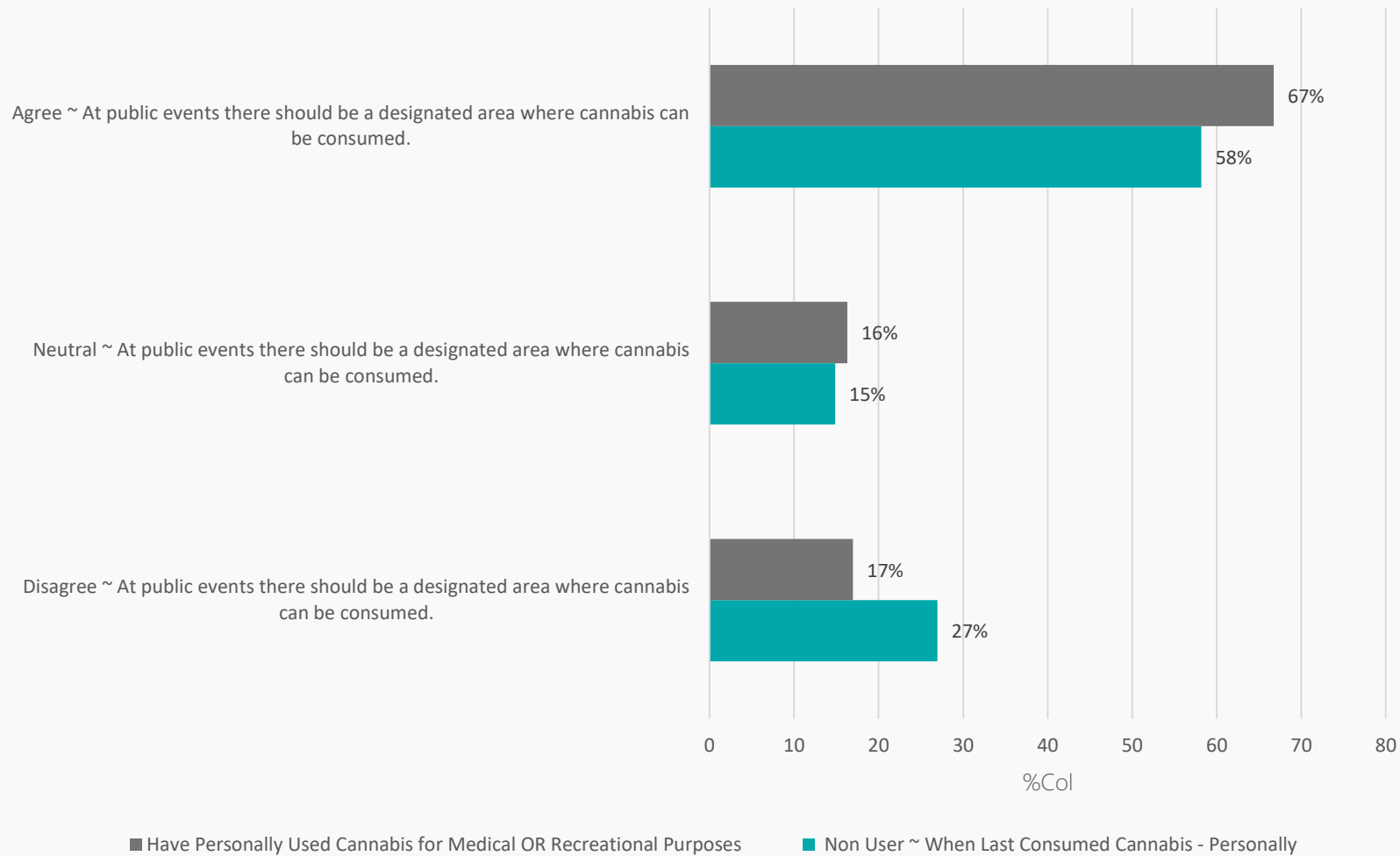
Rules around public consumption of cannabis should be like smoking or vaping tobacco in public.



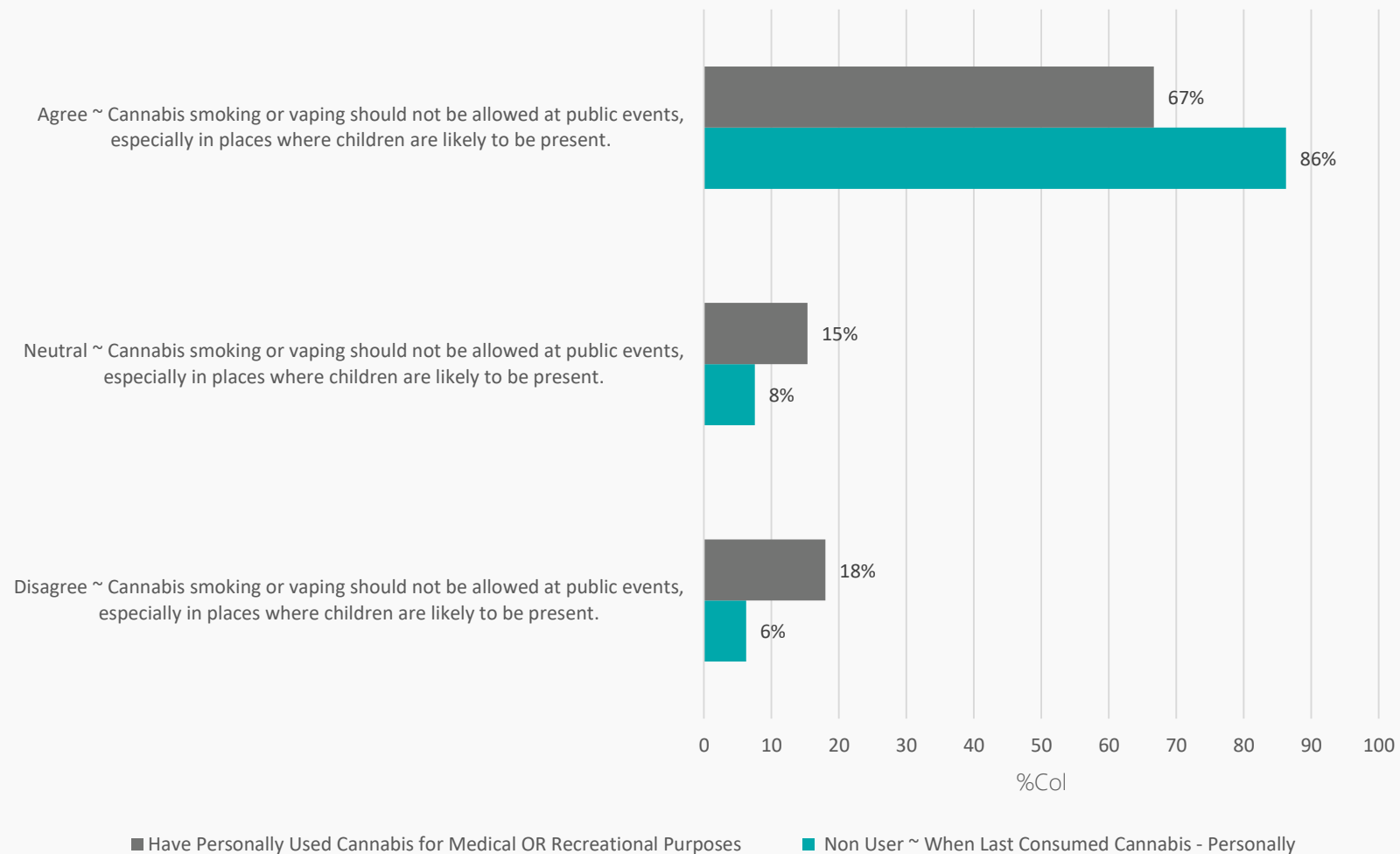
There should be clear limits where cannabis can be consumed.



At public events there should be a designated area where cannabis can be consumed.



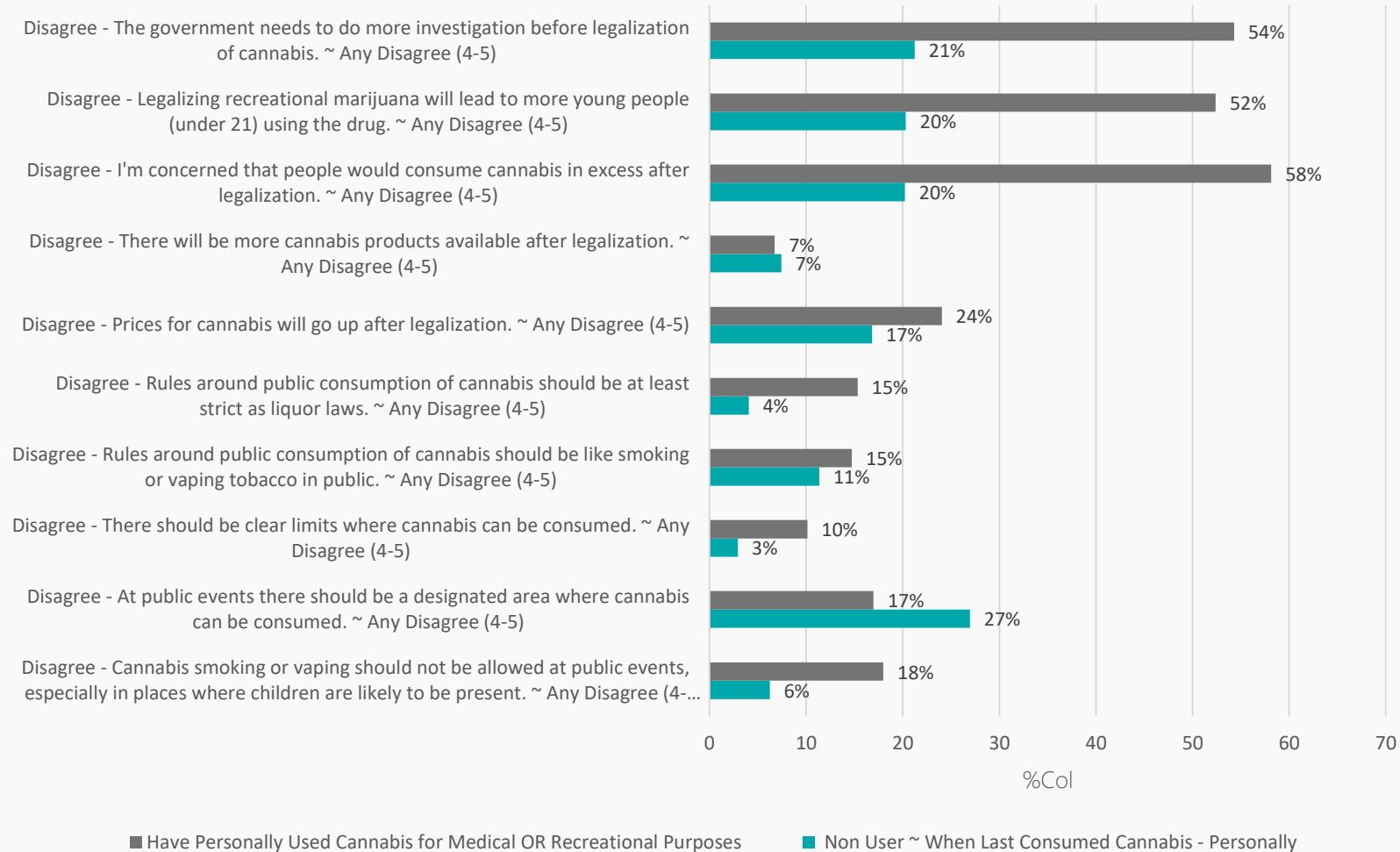
Cannabis smoking or vaping should not be allowed at public events, especially in places where children are likely to be present.



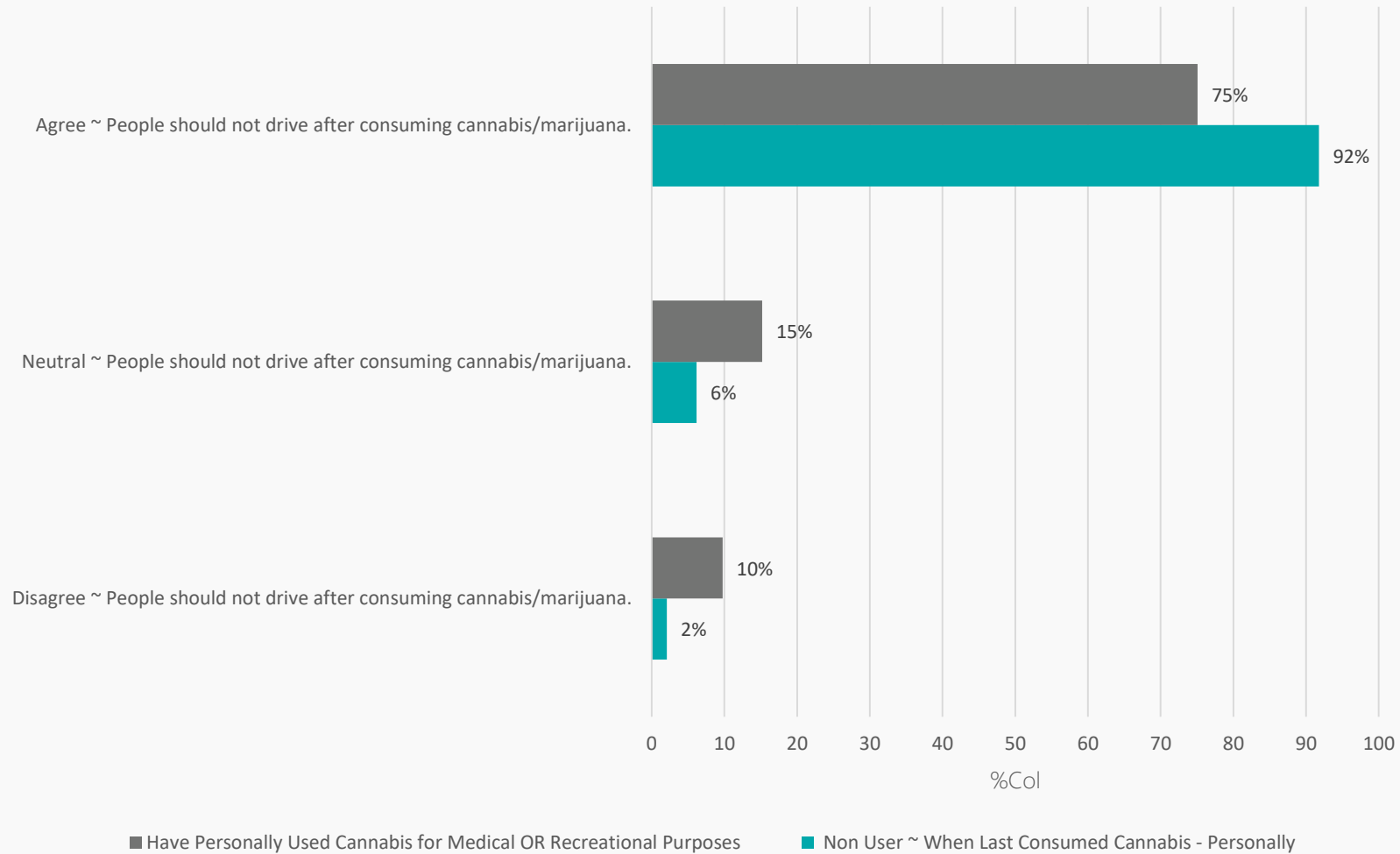
Any Agree (1-2)



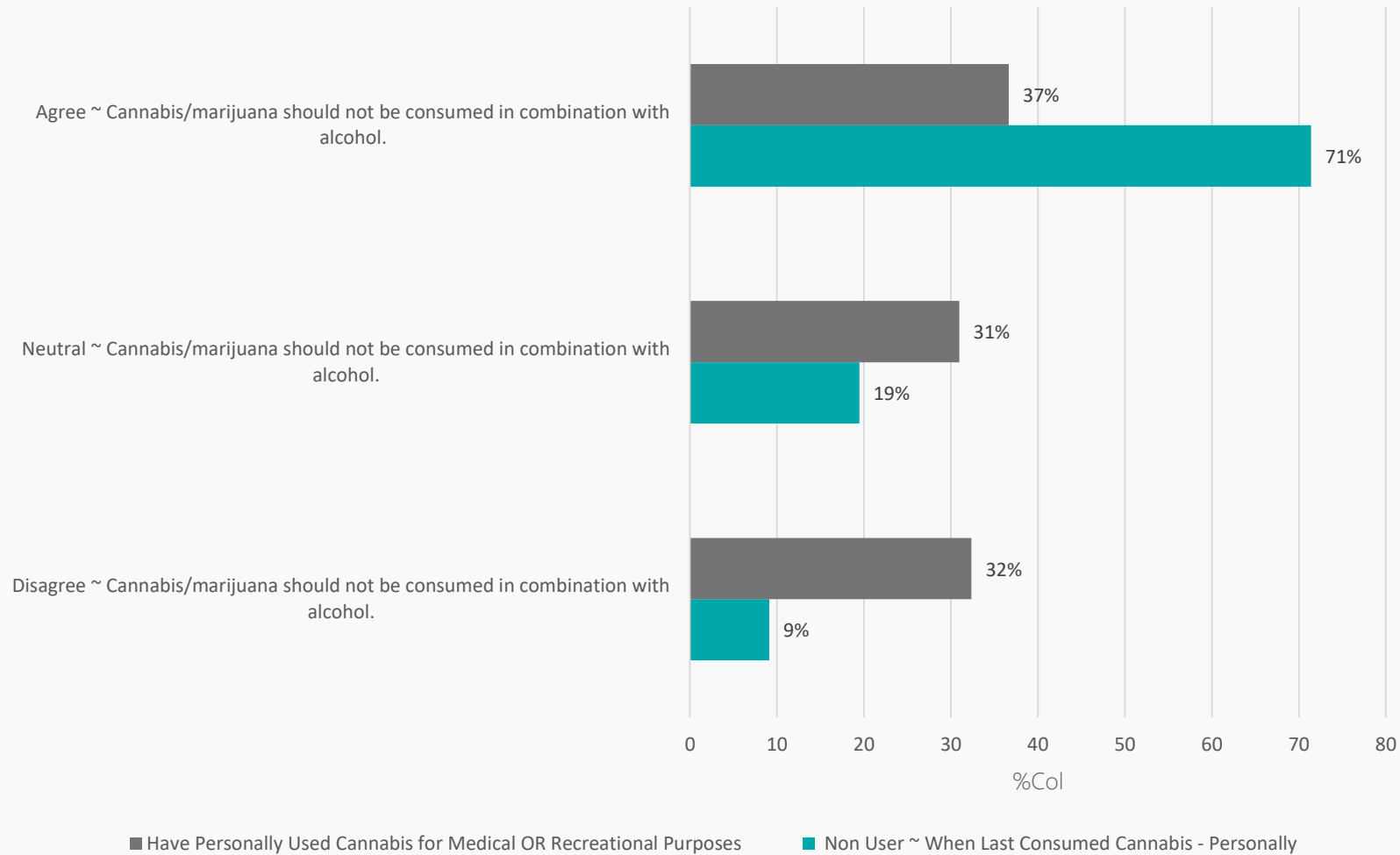
Any Disagree (4-5)



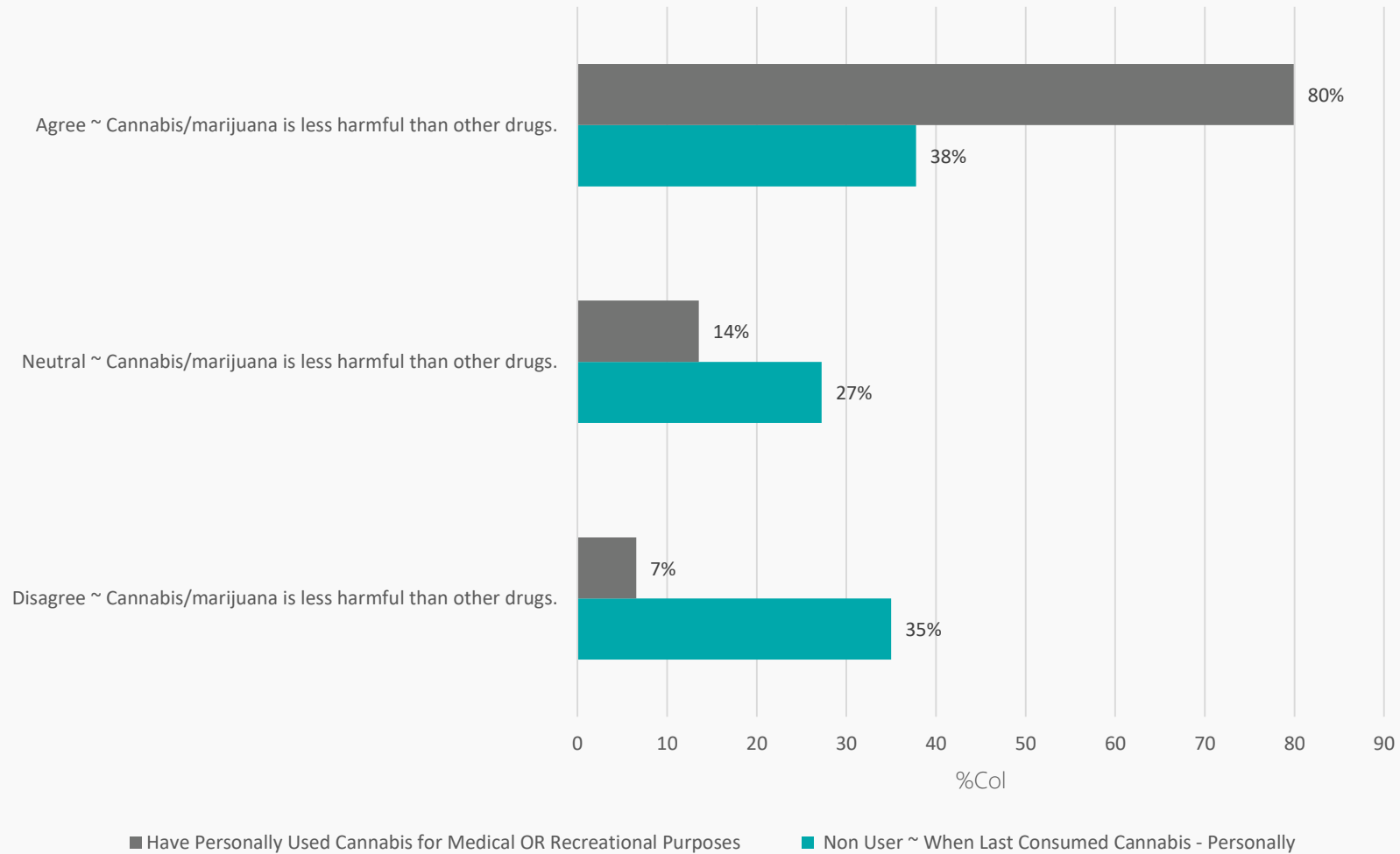
People should not drive after consuming cannabis/marijuana.



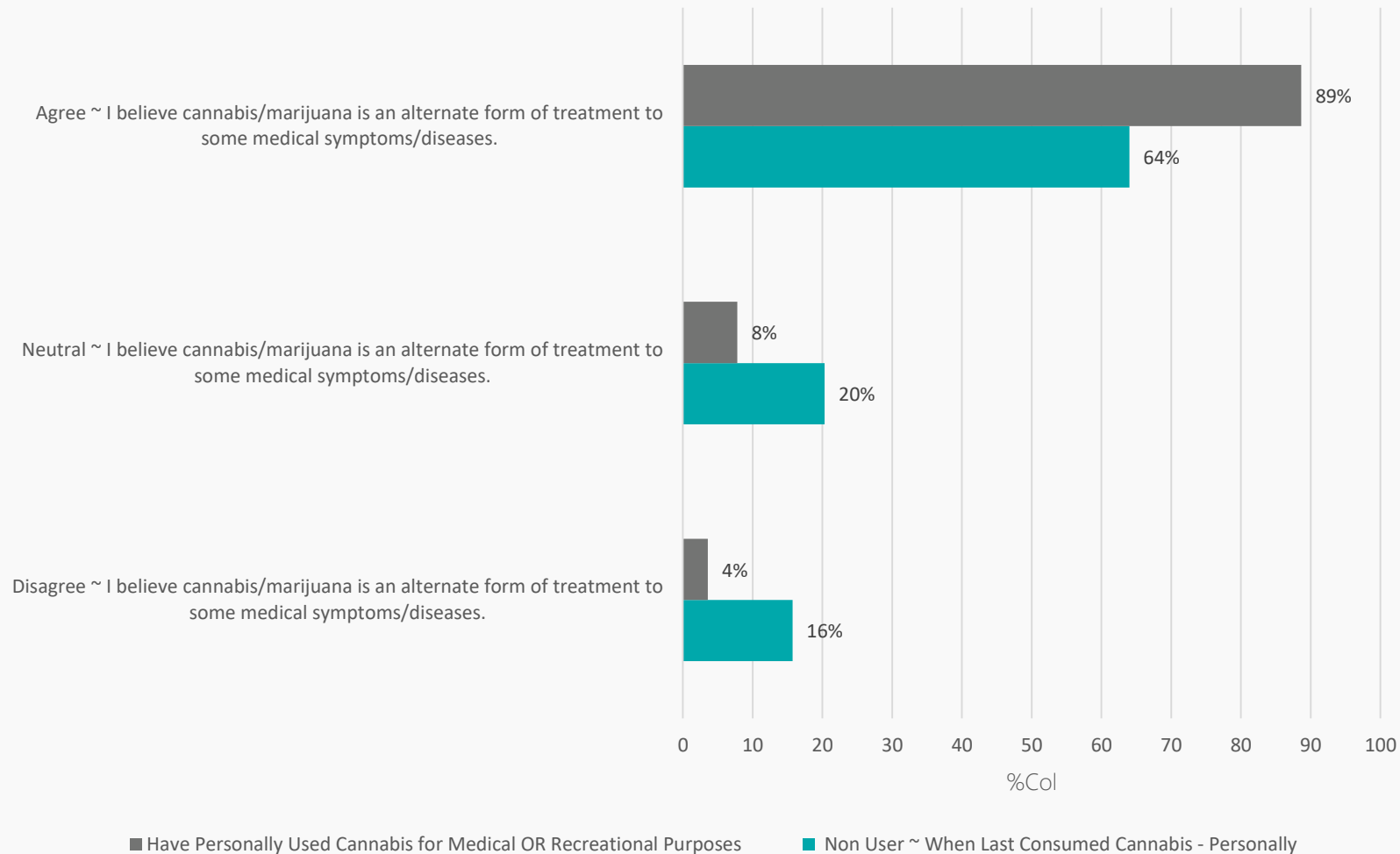
Cannabis/marijuana should not be consumed in combination with alcohol.



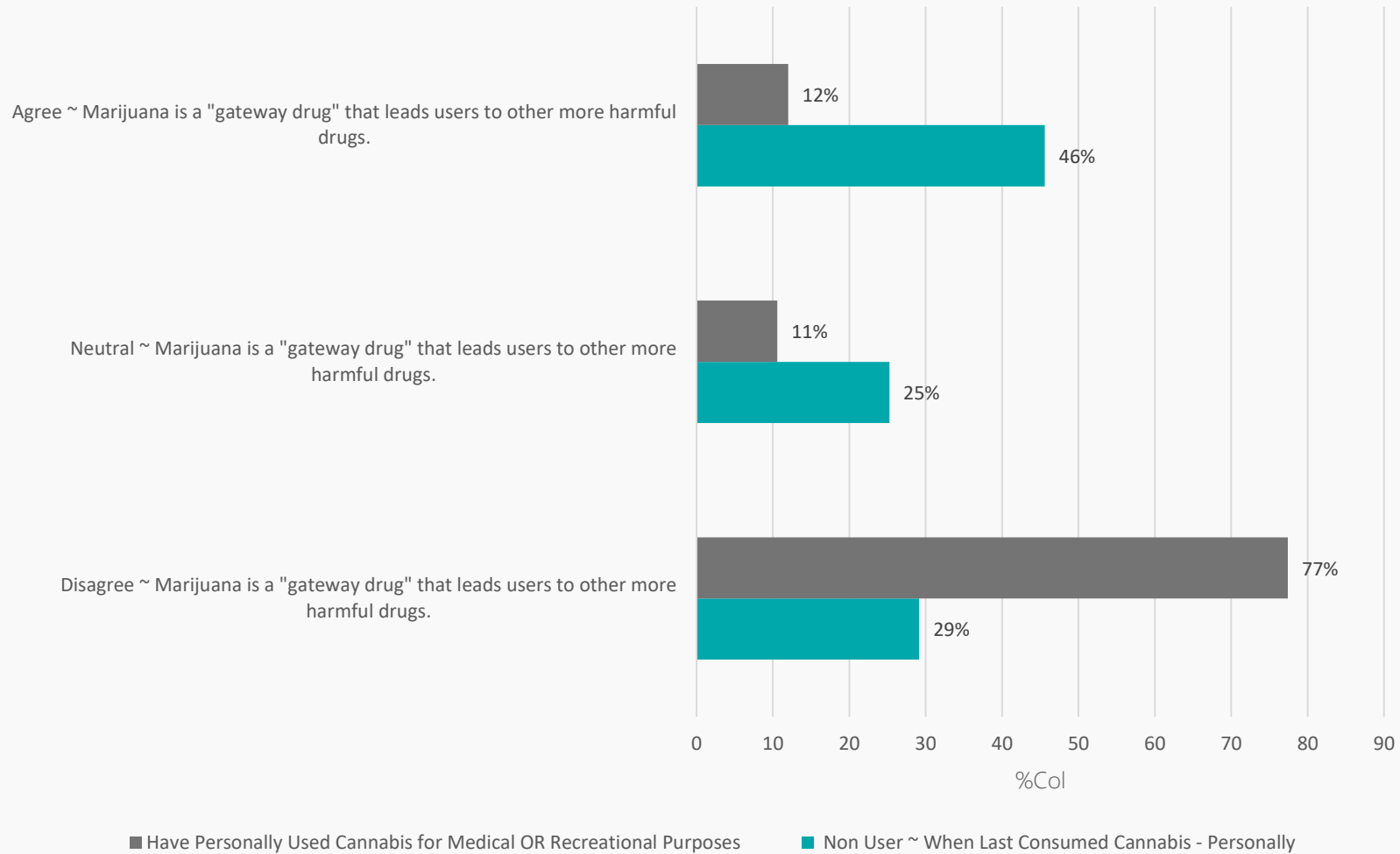
Cannabis/marijuana is less harmful than other drugs.



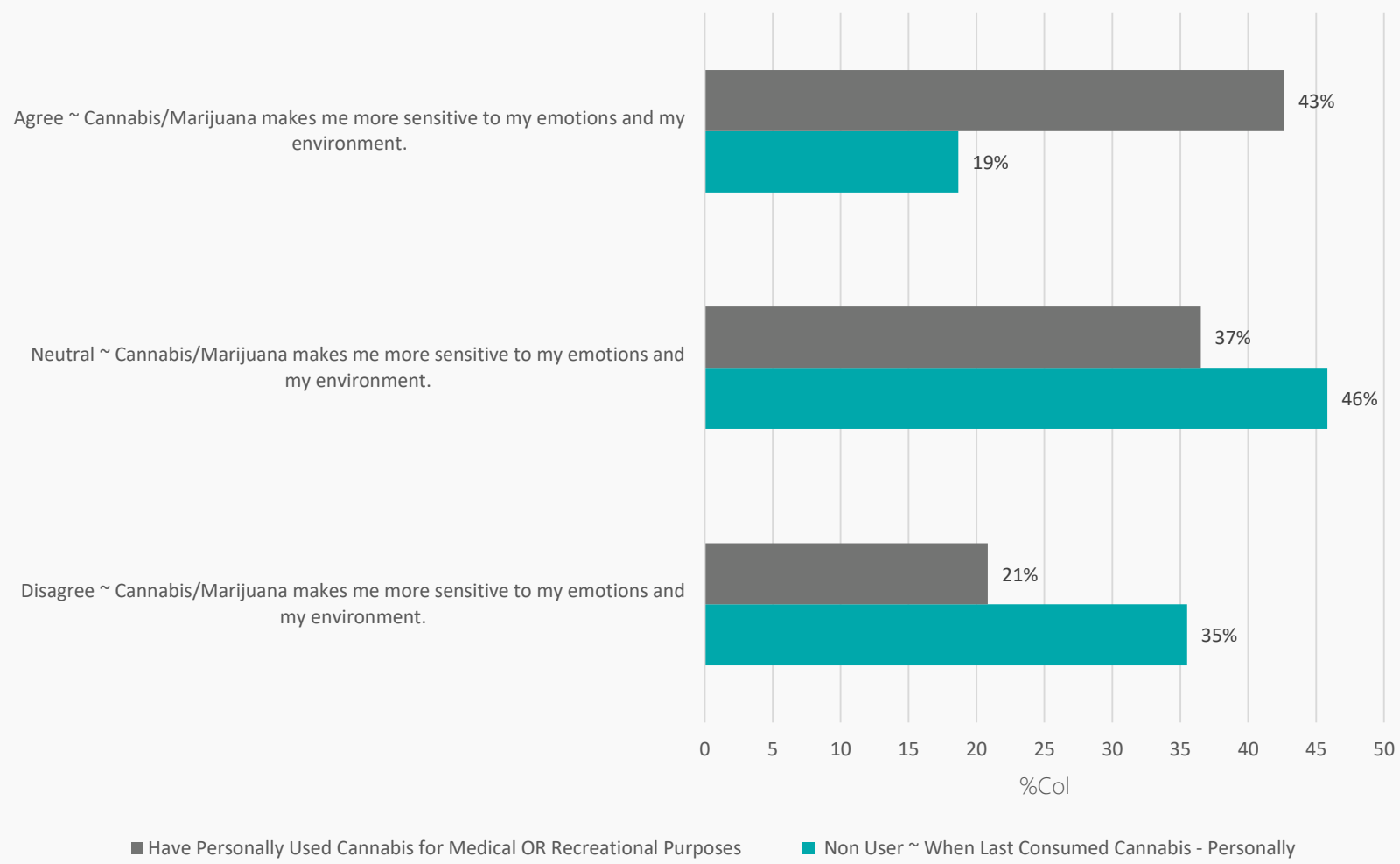
I believe cannabis/marijuana is an alternate form of treatment to some medical symptoms/diseases.



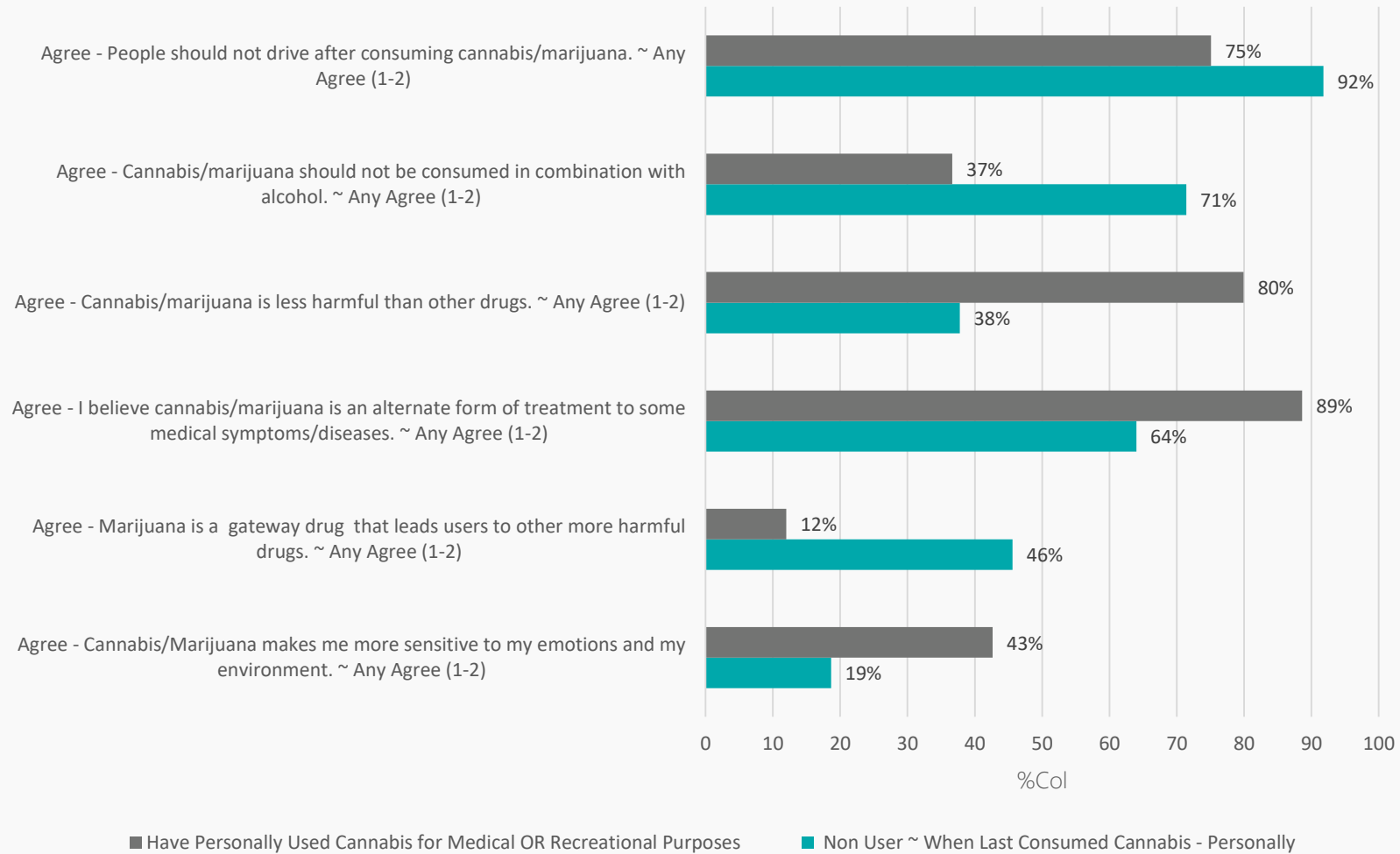
Marijuana is a "gateway drug" that leads users to other more harmful drugs.



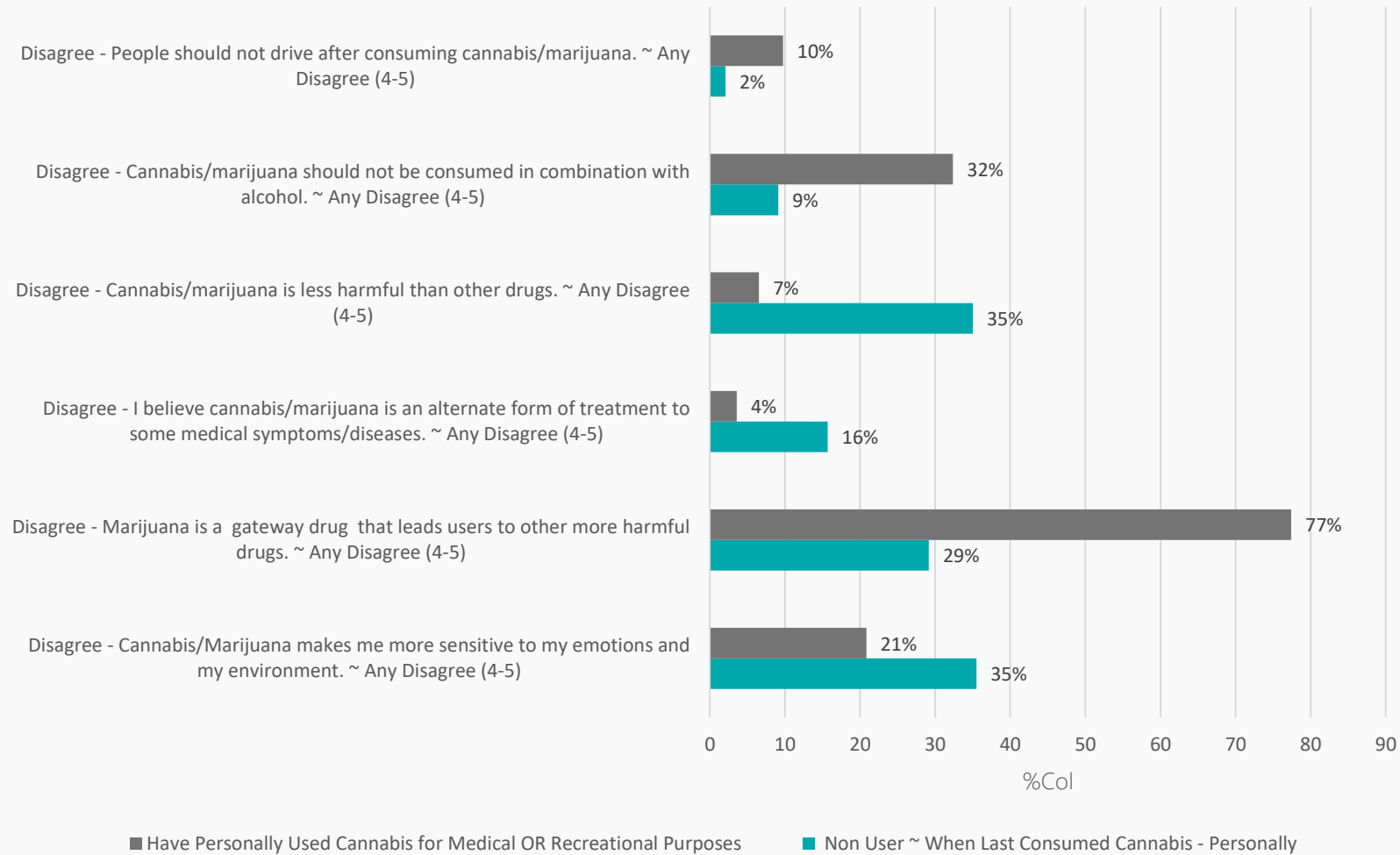
Cannabis/Marijuana makes me more sensitive to my emotions and my environment.



Any Agree (1-2)



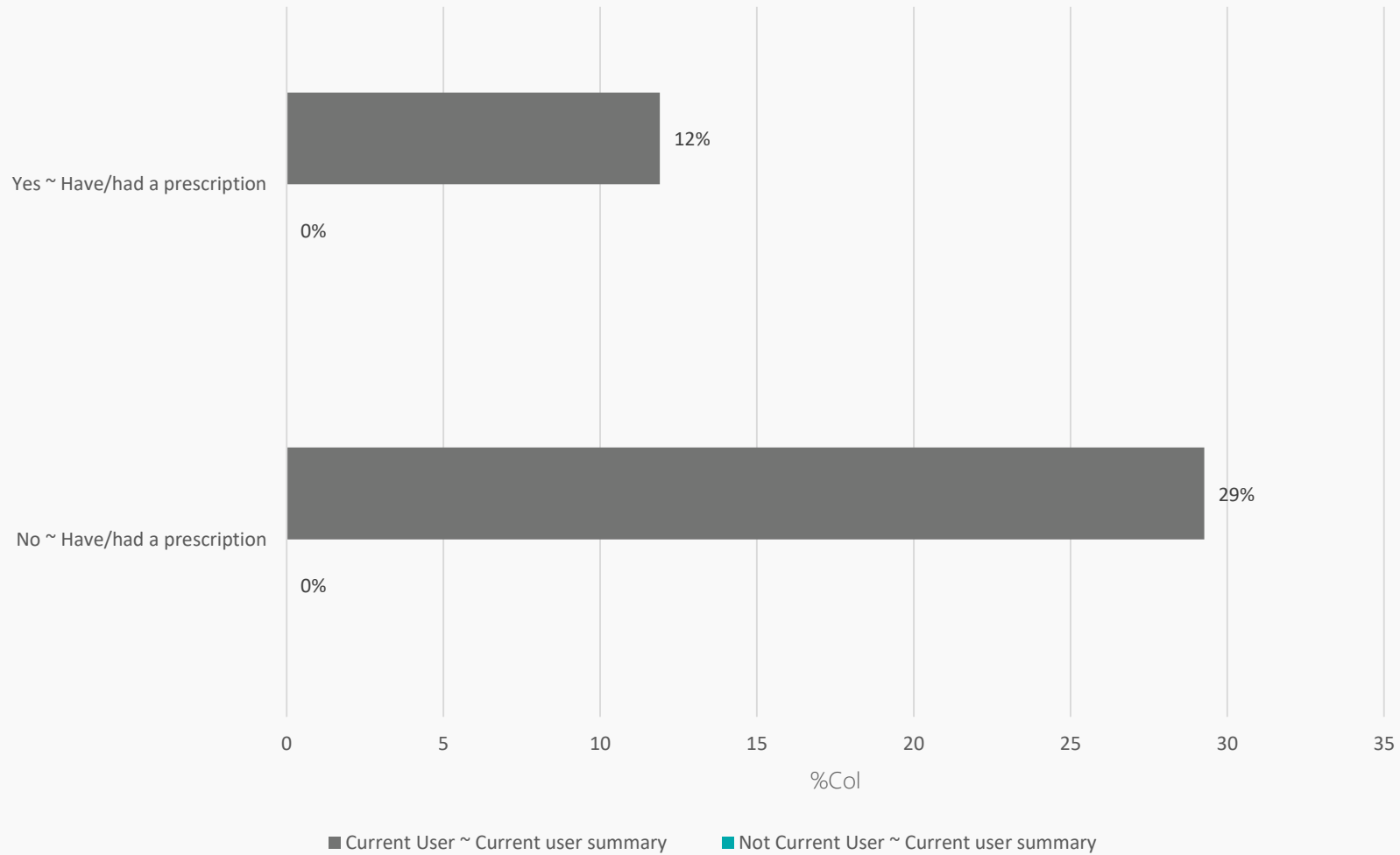
Any Disagree (4-5)



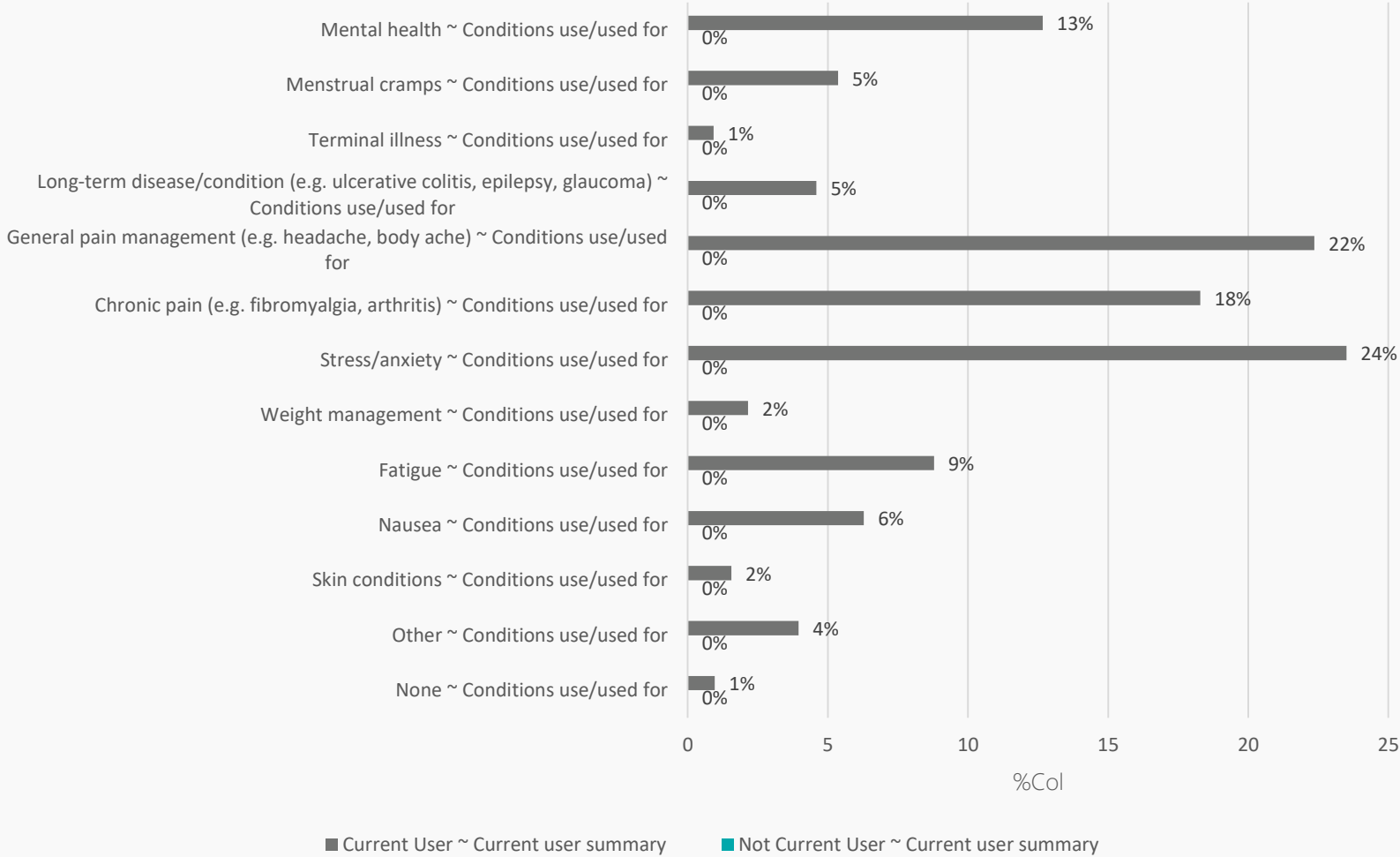
Medical Conditions personally have



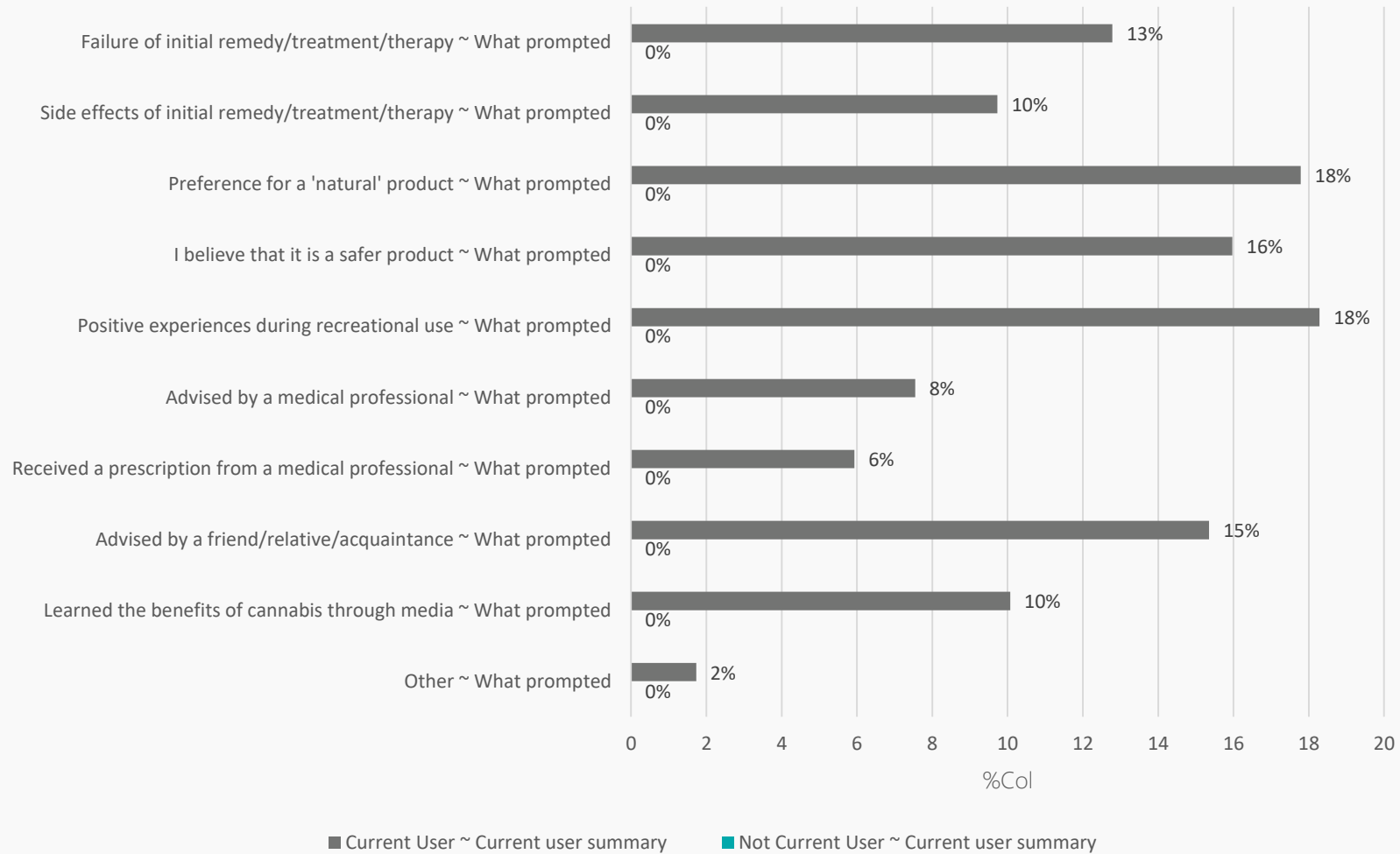
Have/had a prescription



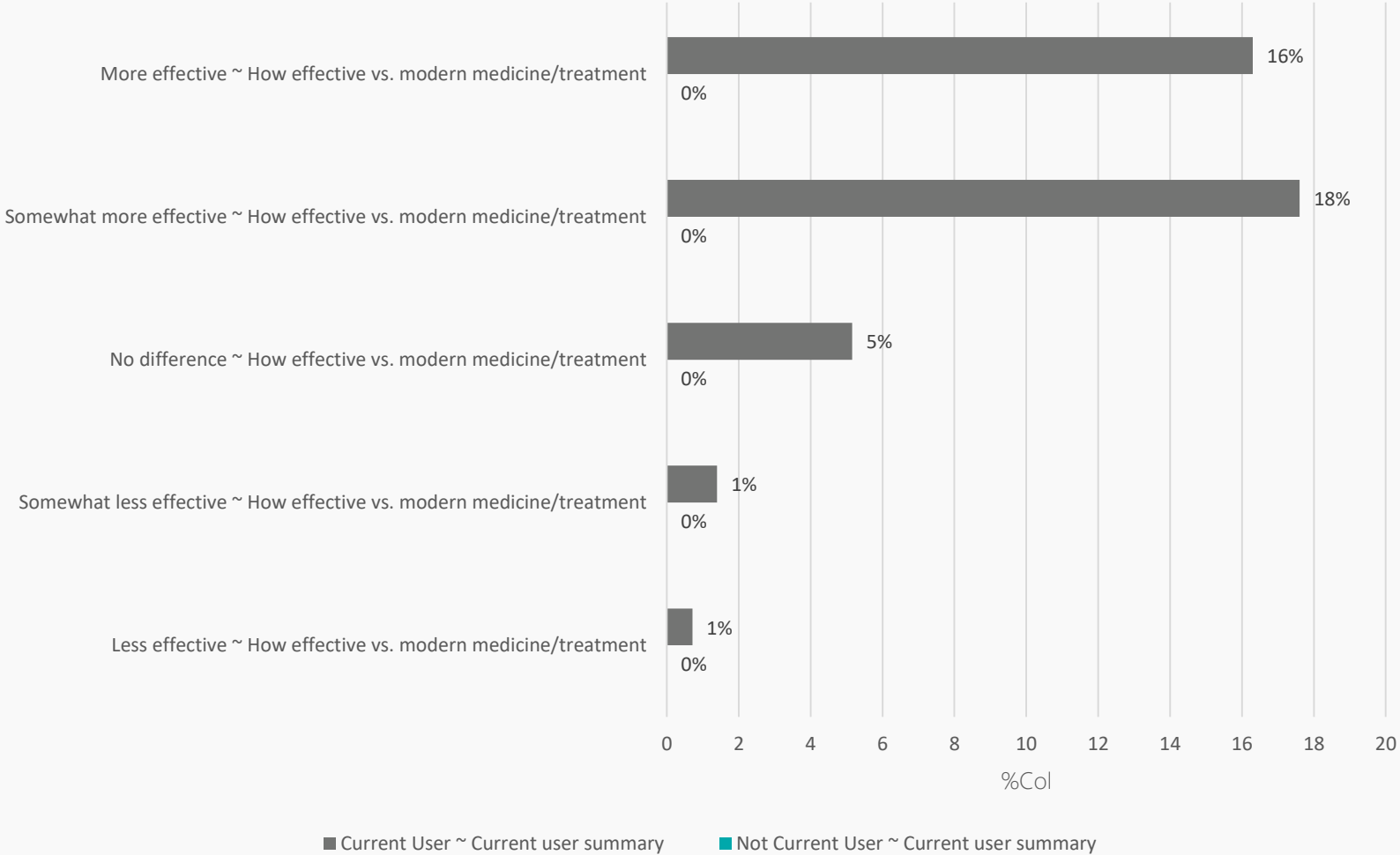
Conditions use/used for



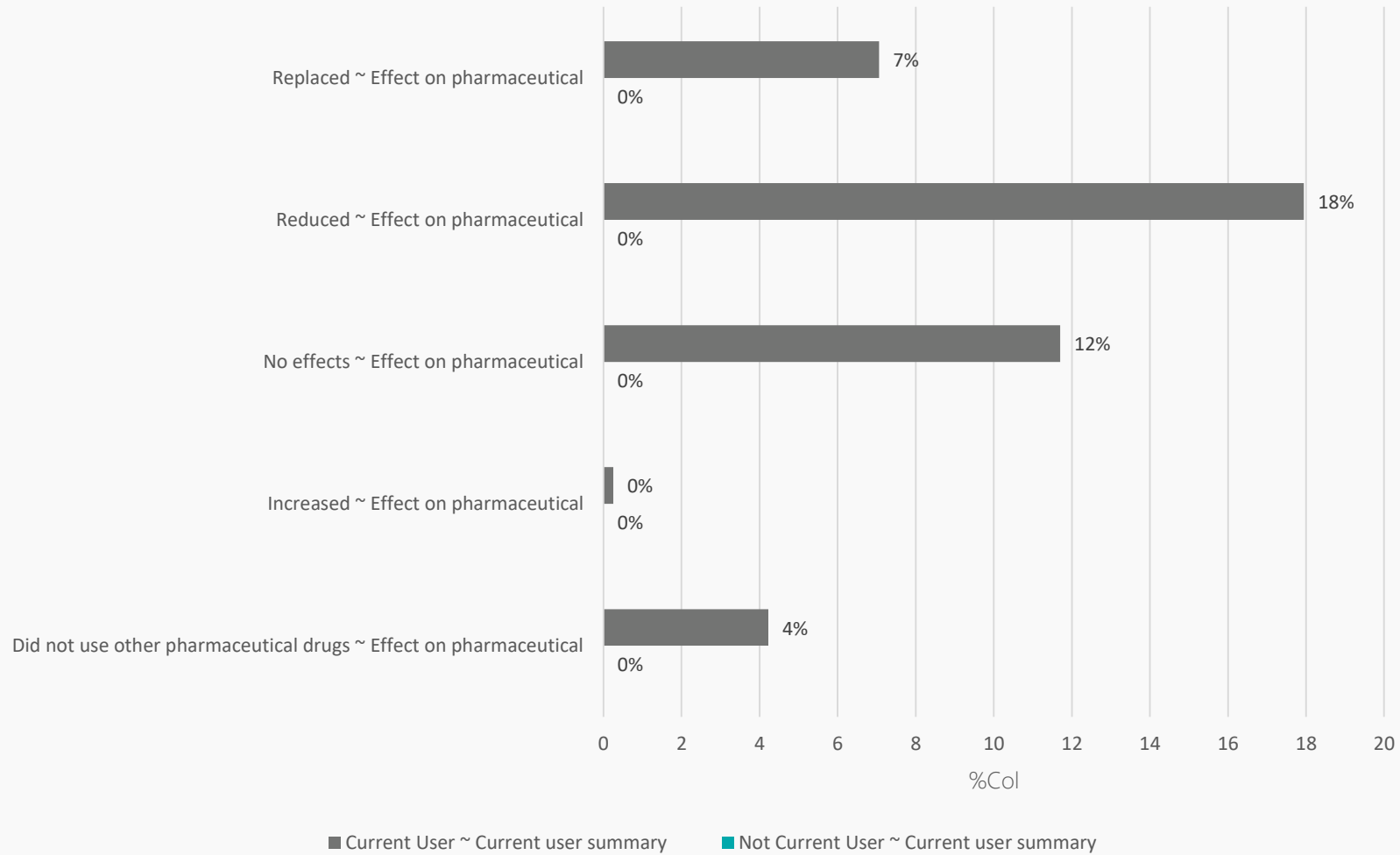
What prompted



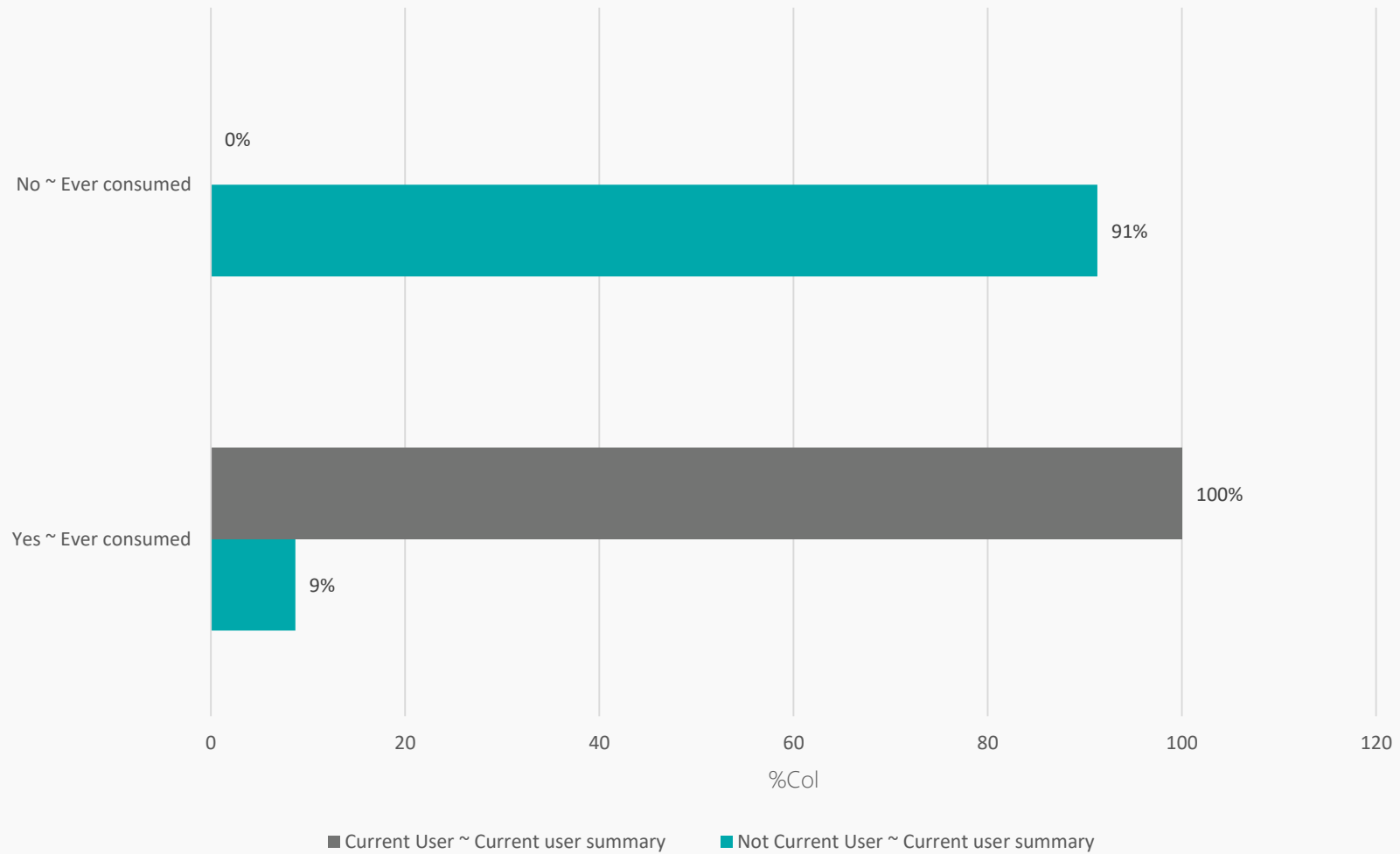
How effective vs. modern medicine/treatment



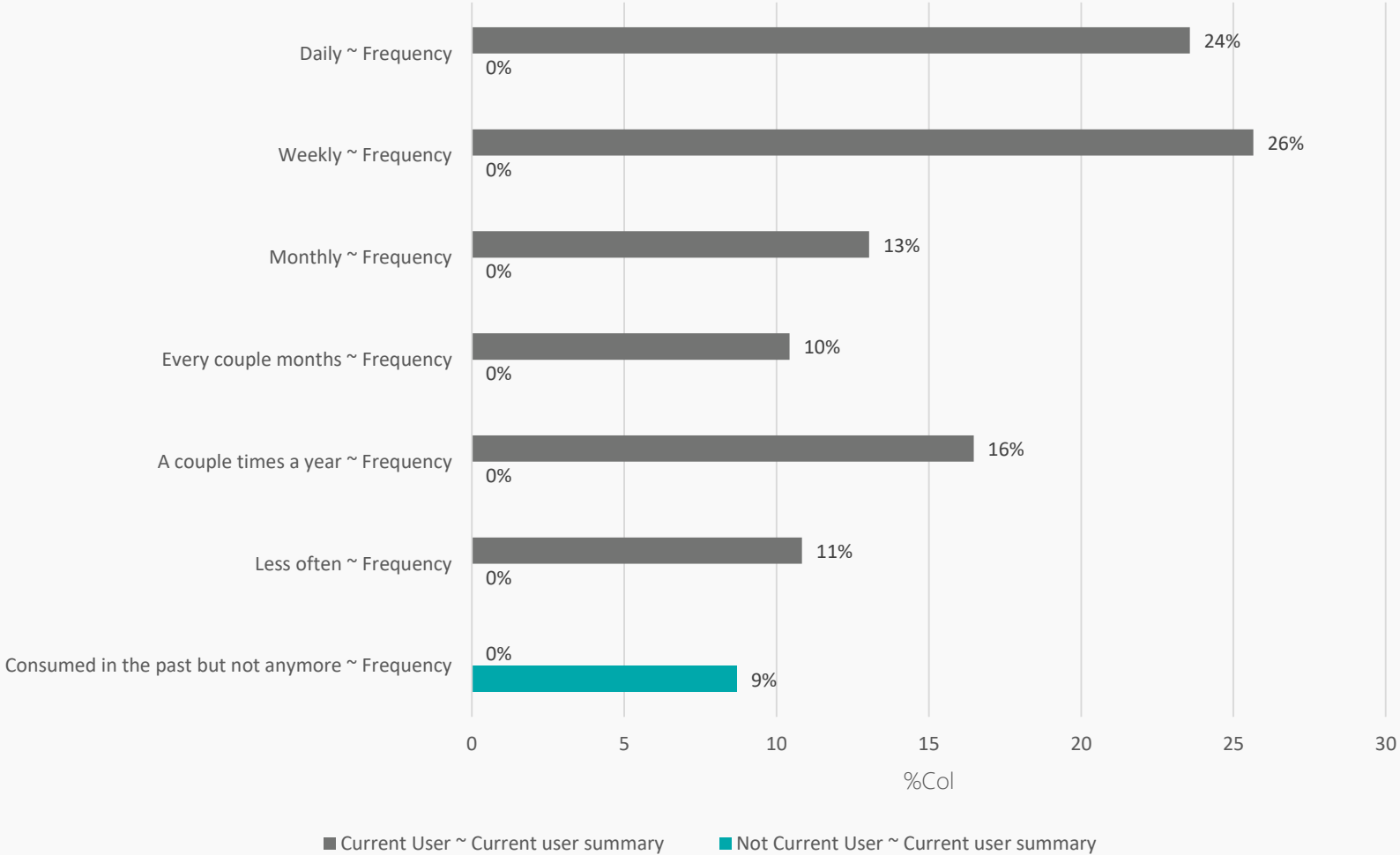
Effect on pharmaceutical



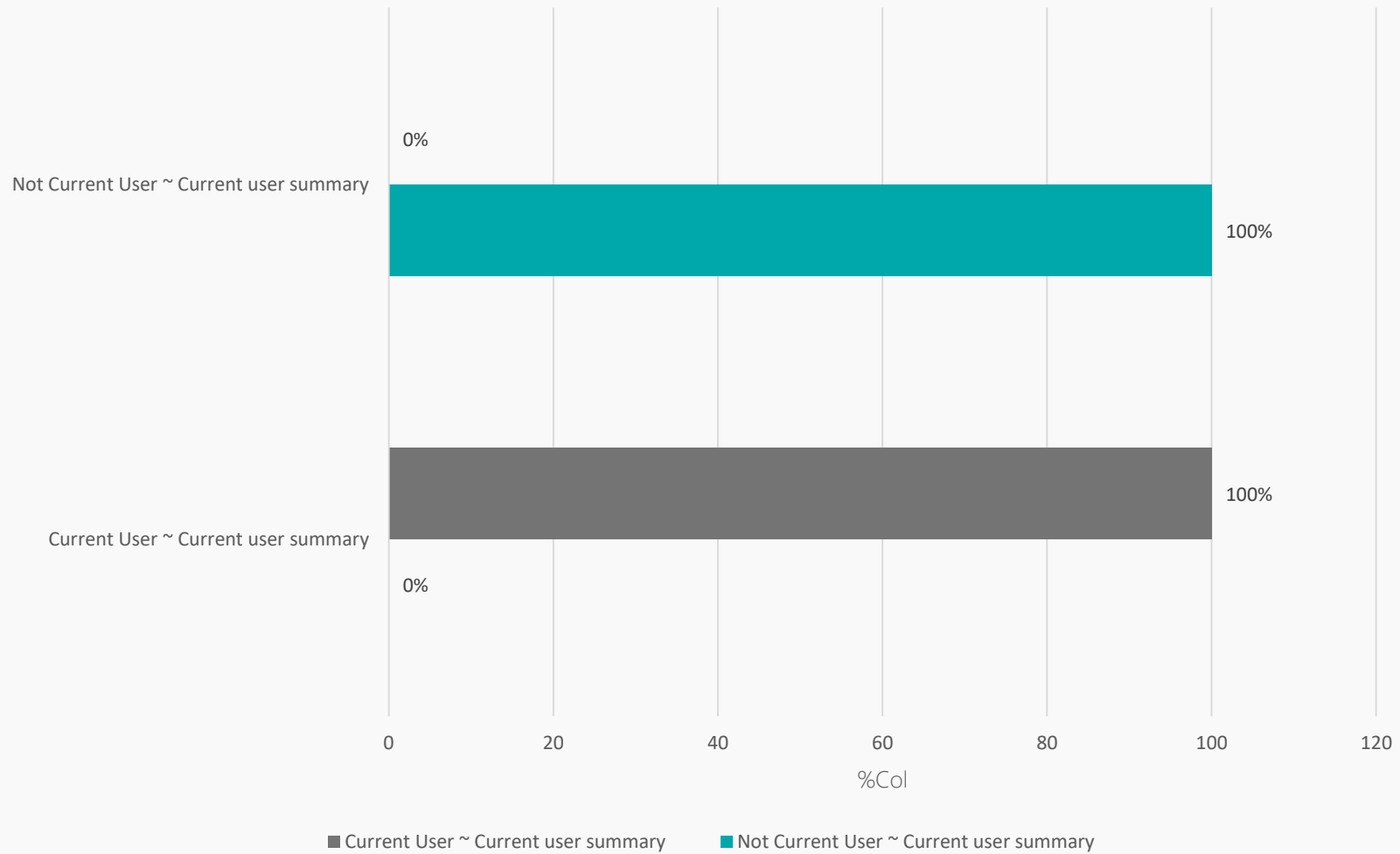
Ever consumed



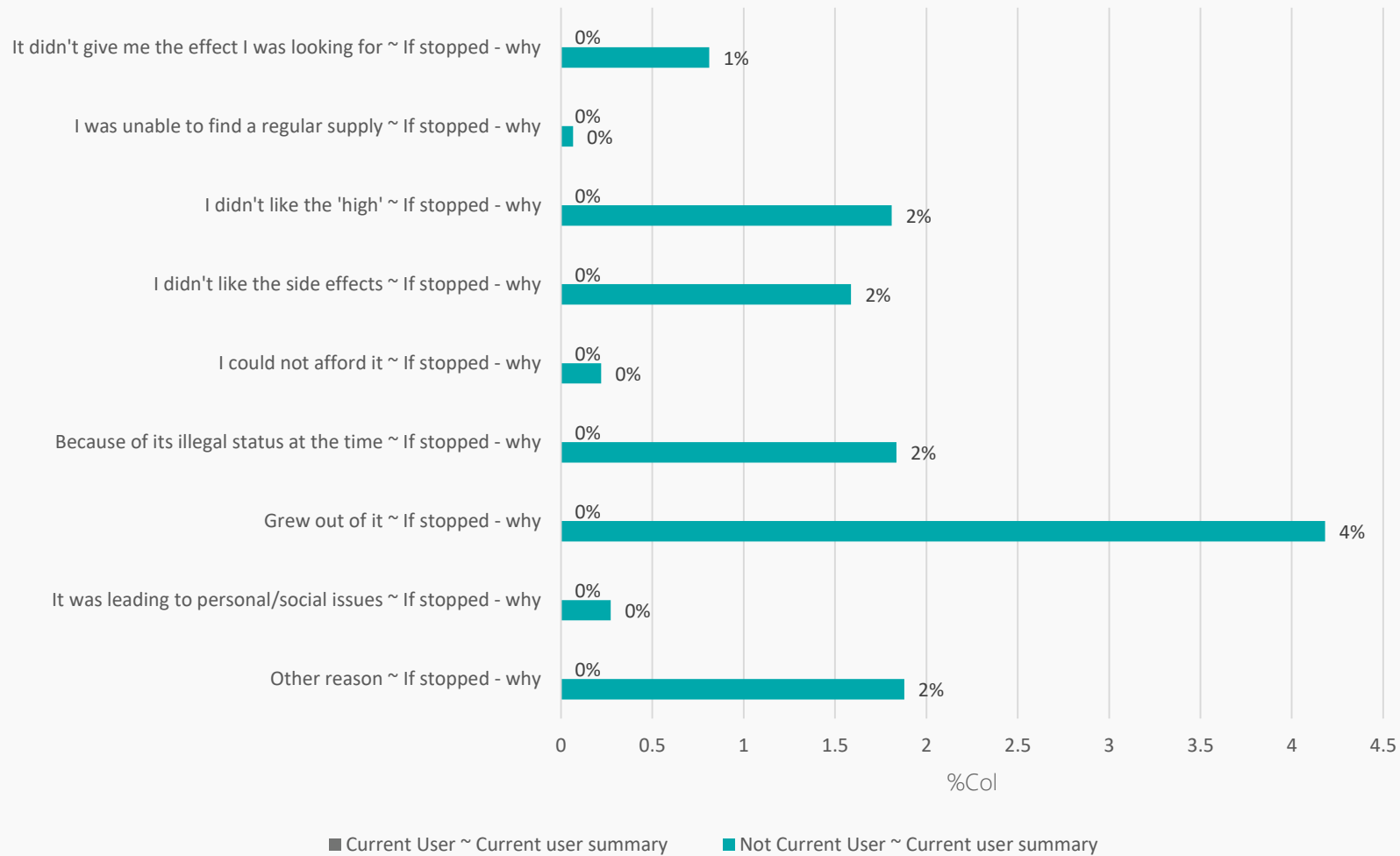
Frequency



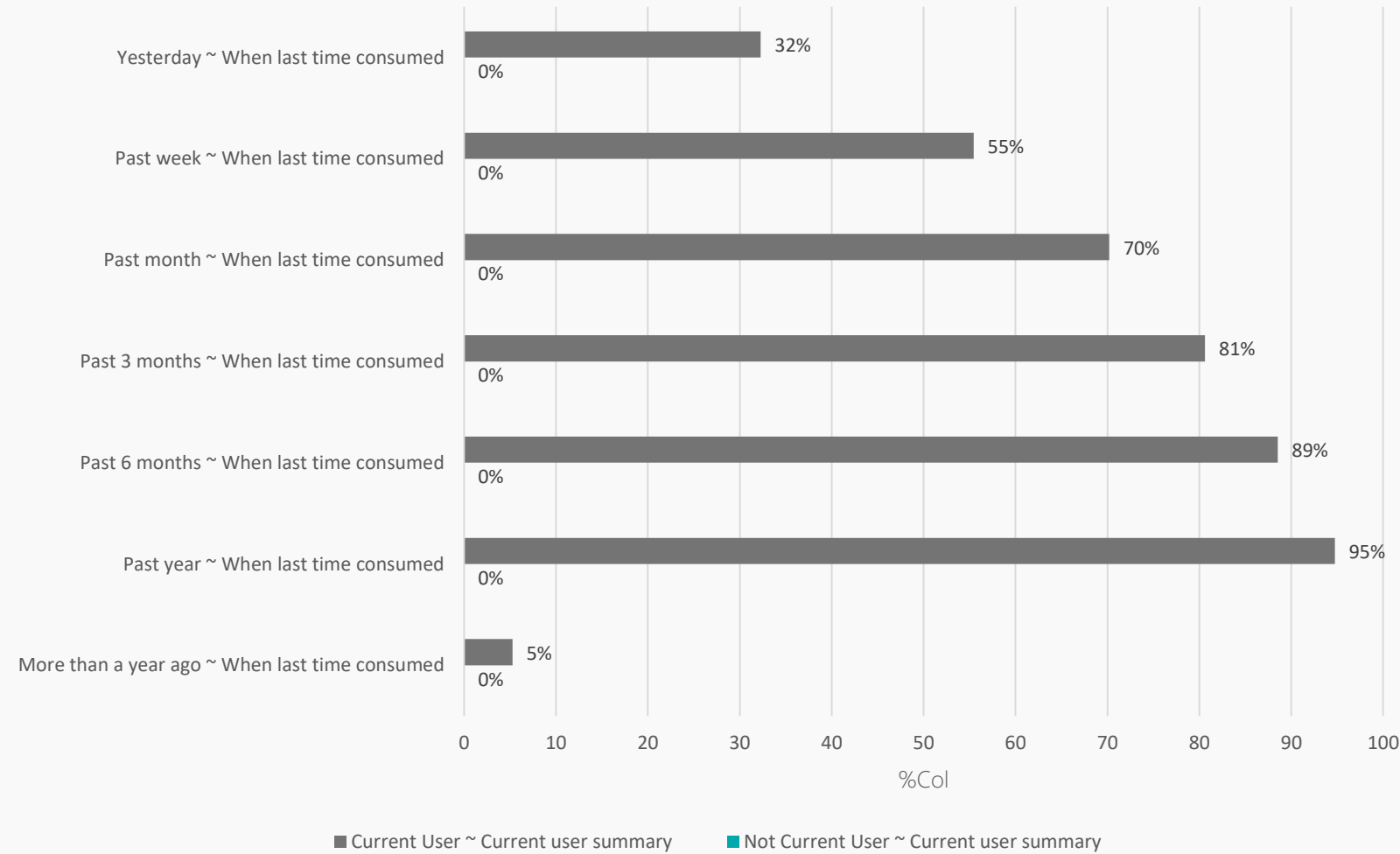
Current user summary



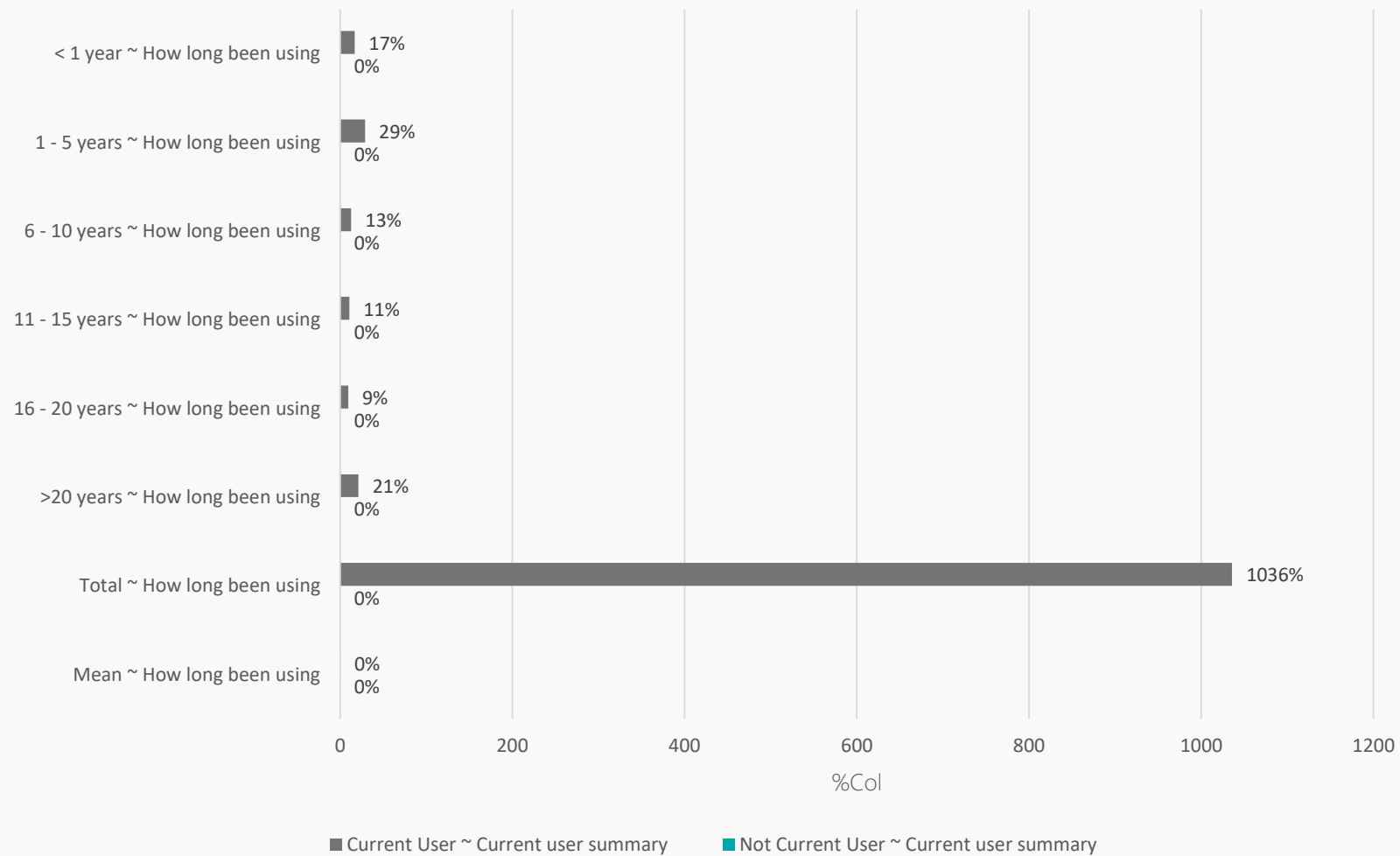
If stopped - why



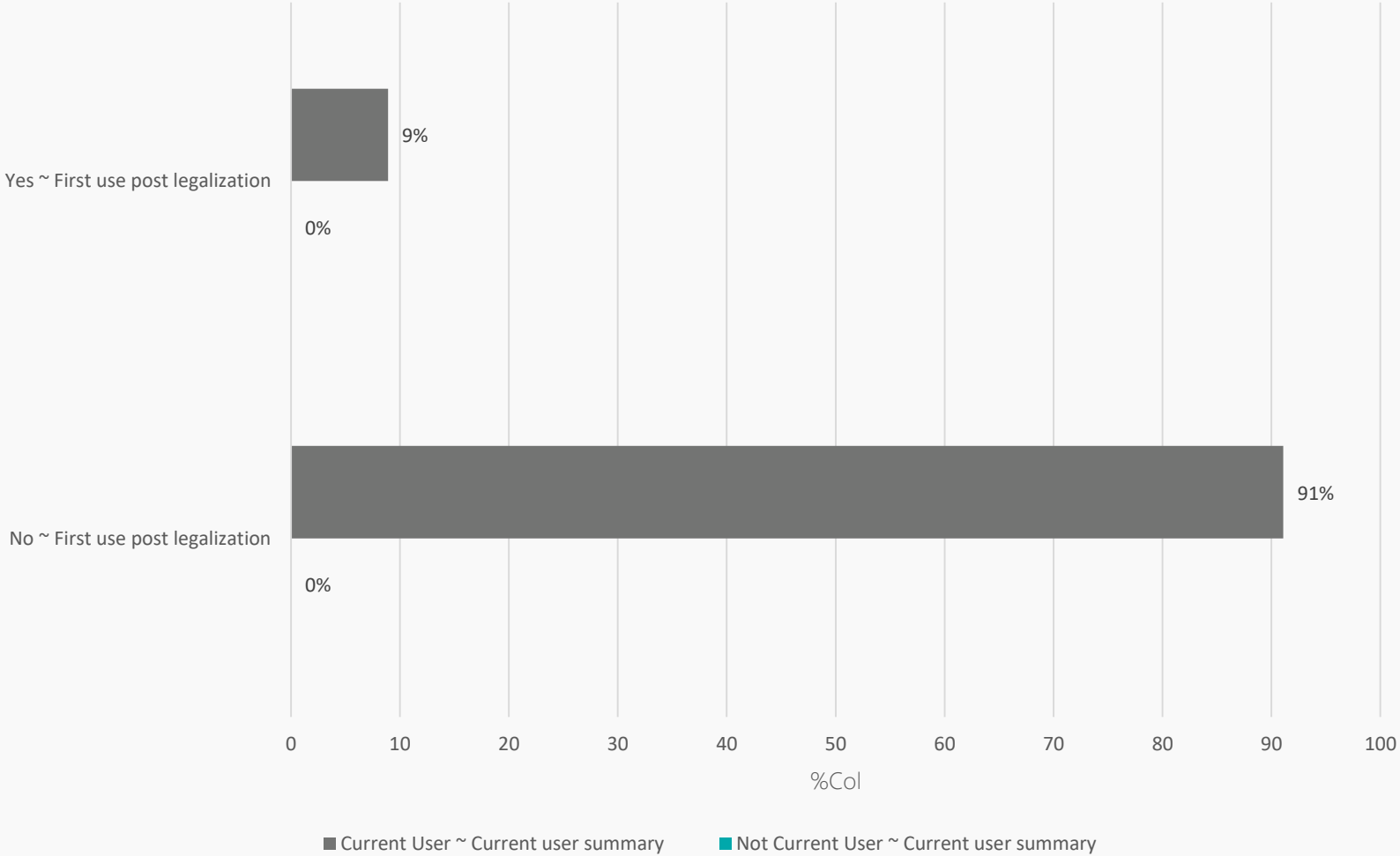
When last time consumed



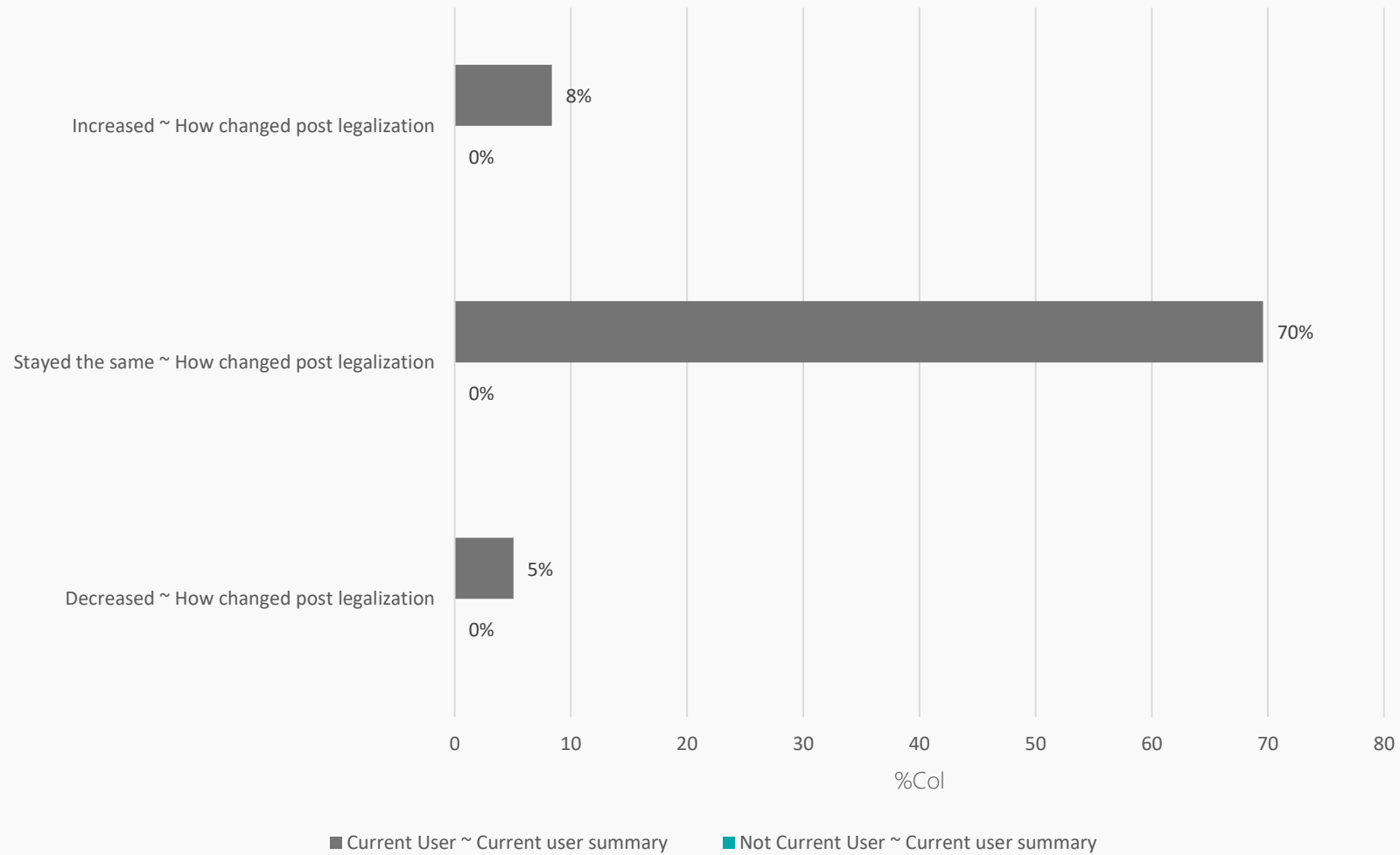
How long been using



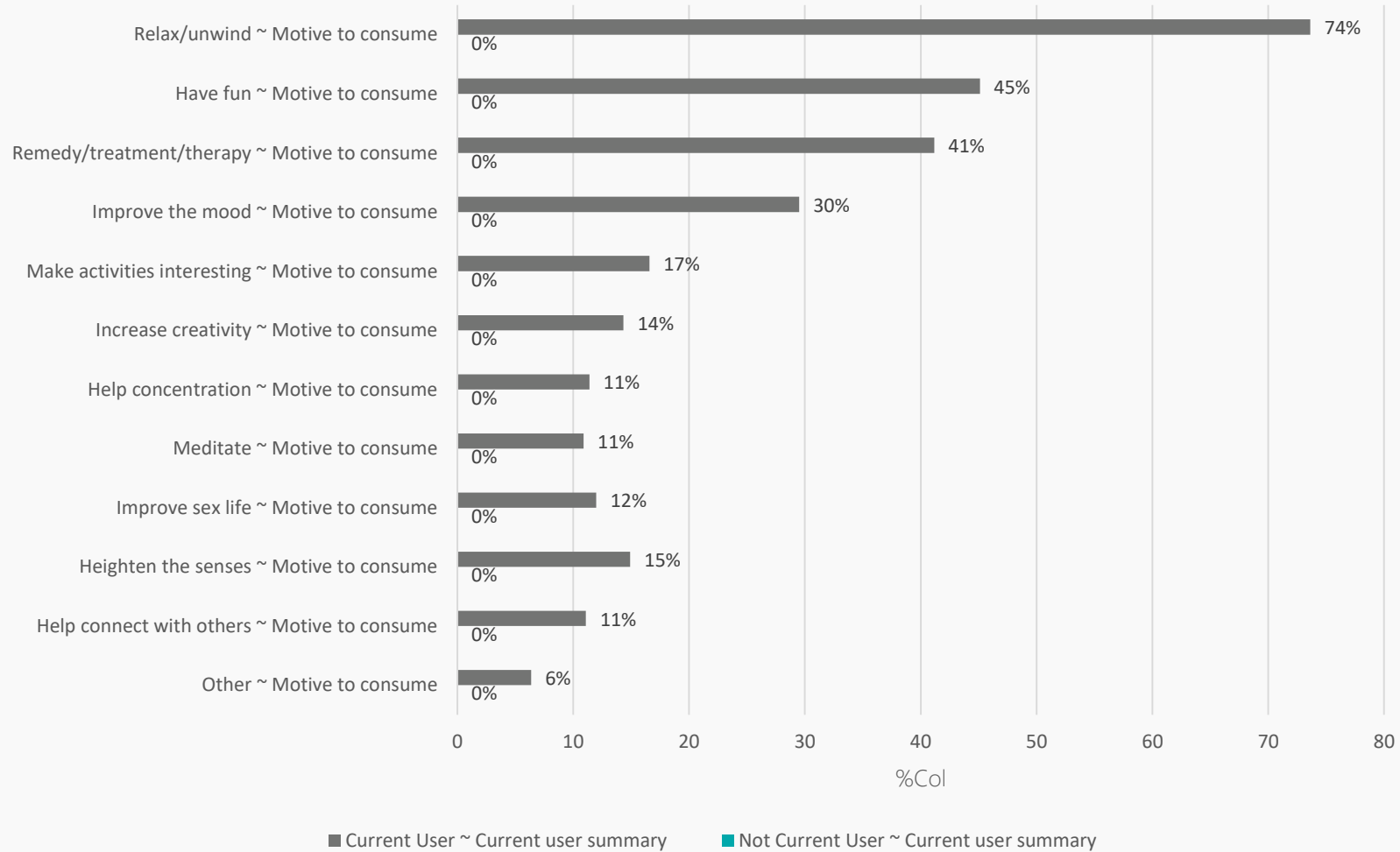
First use post legalization



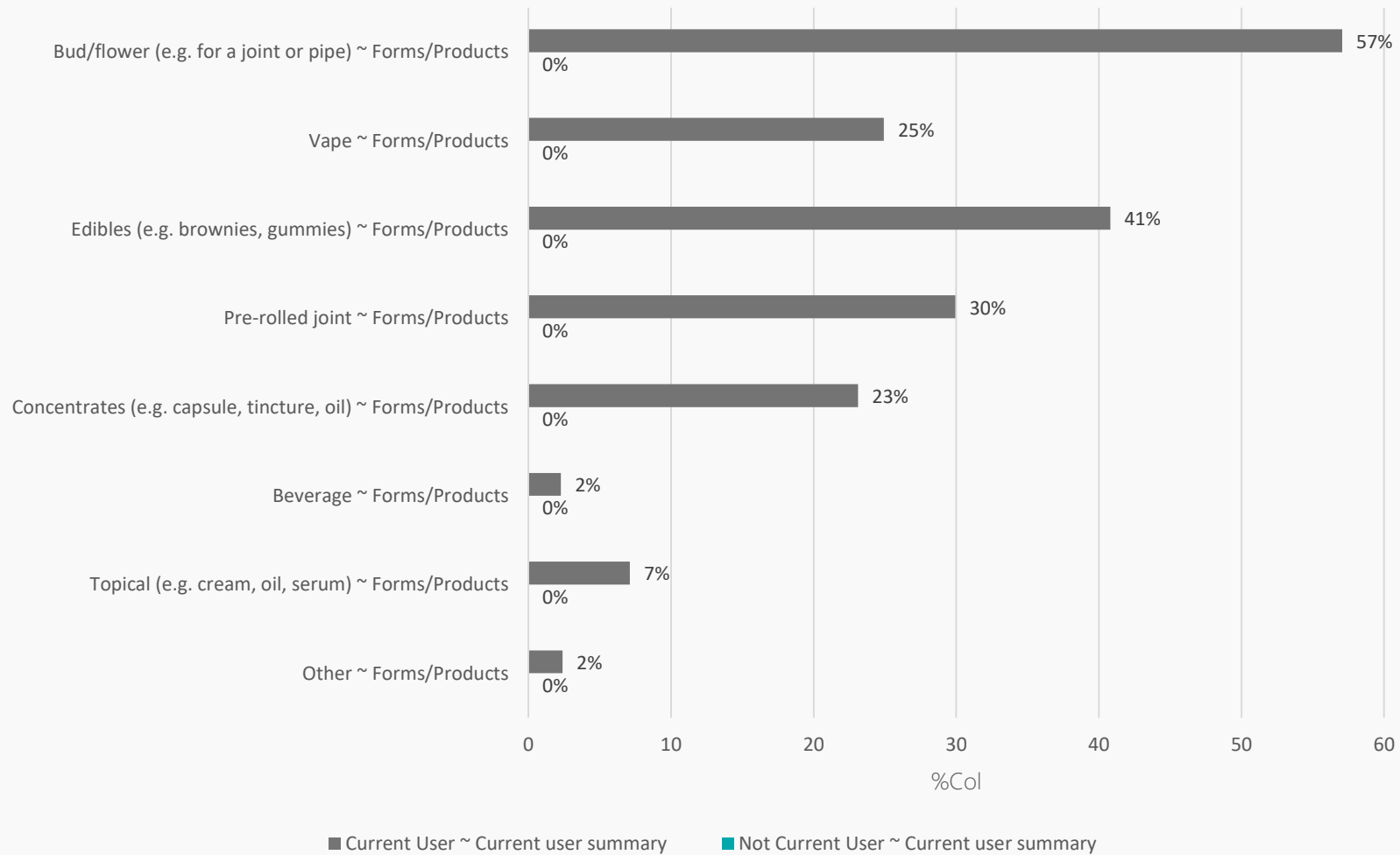
How changed post legalization



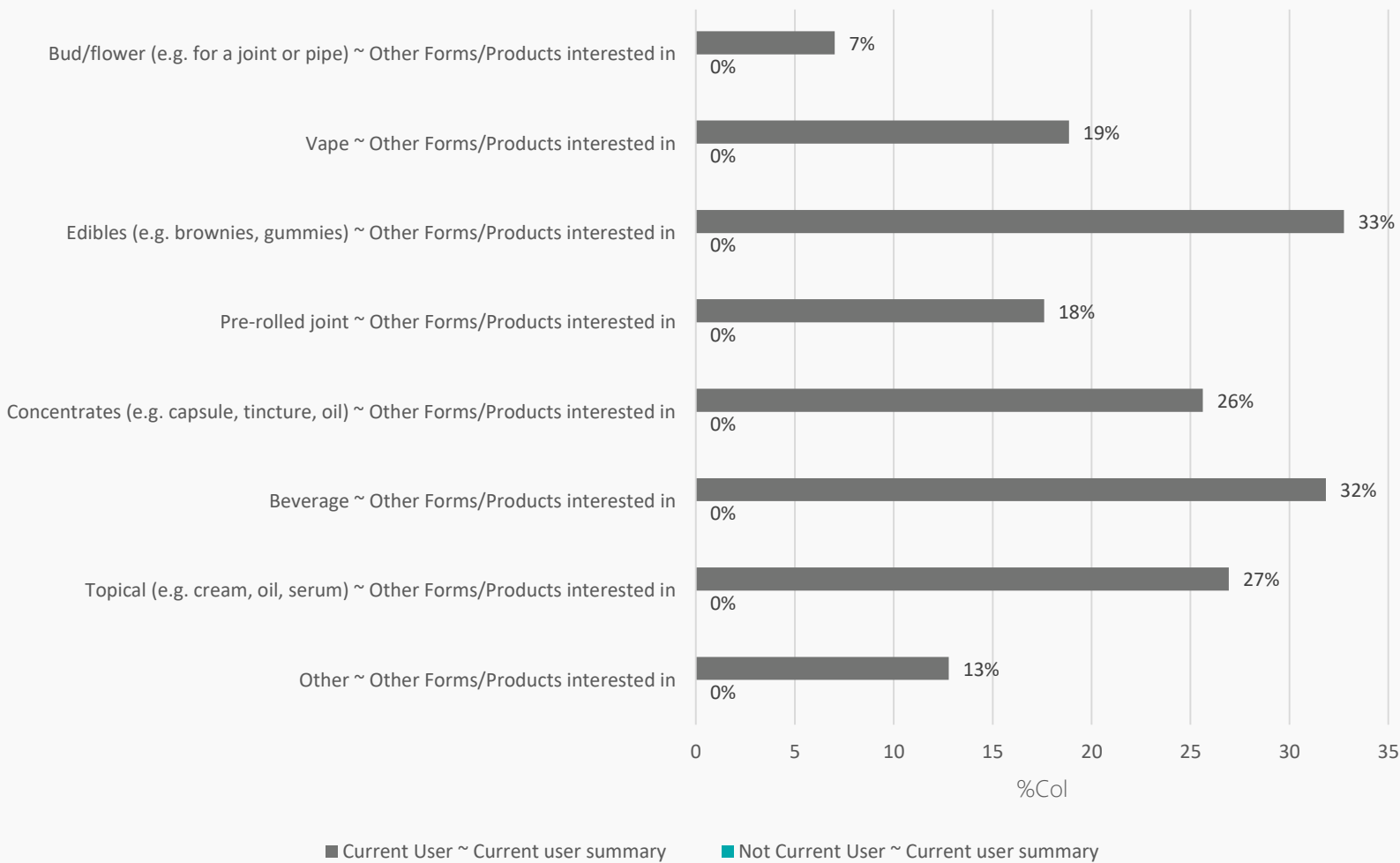
Motive to consume



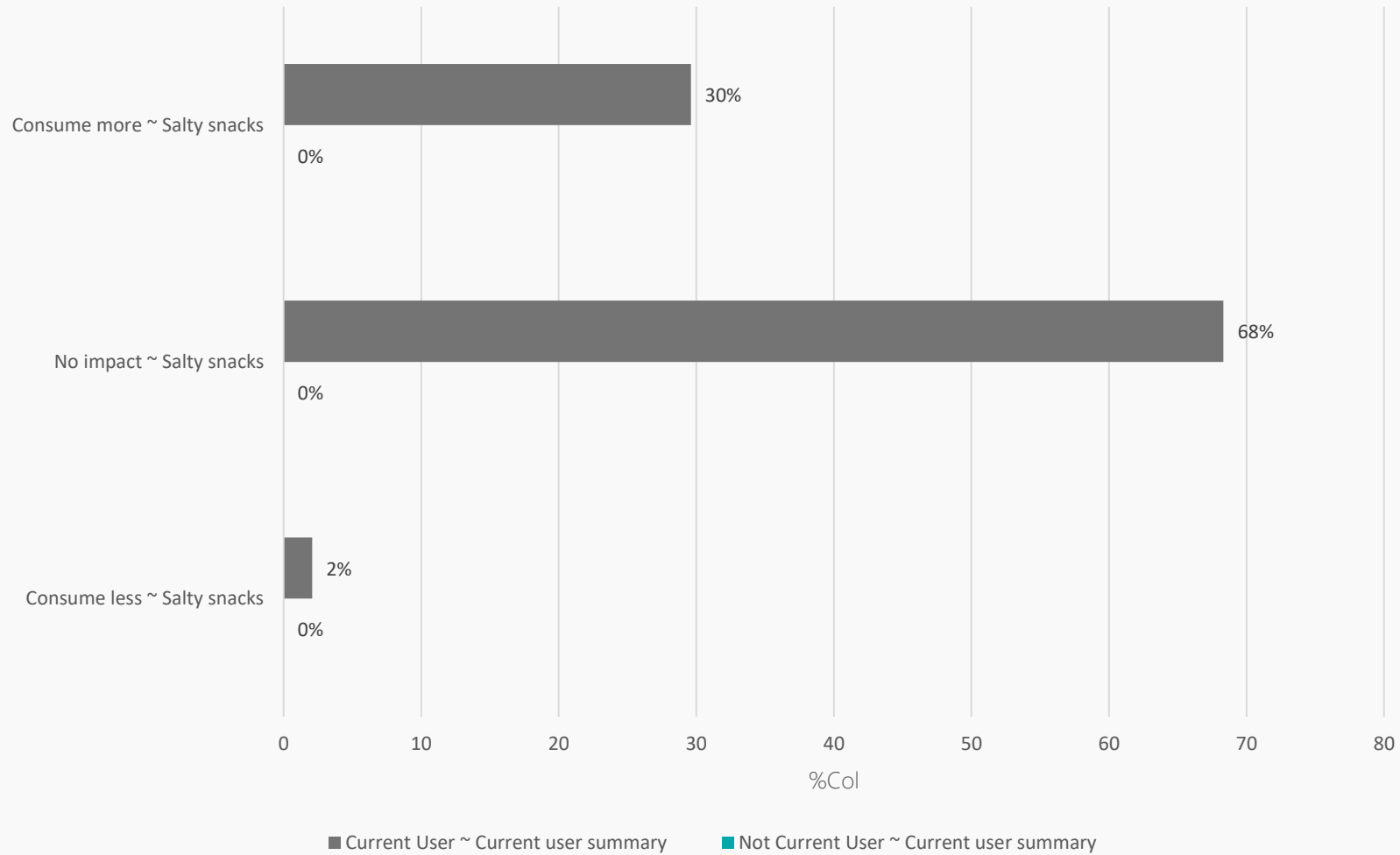
Forms/Products



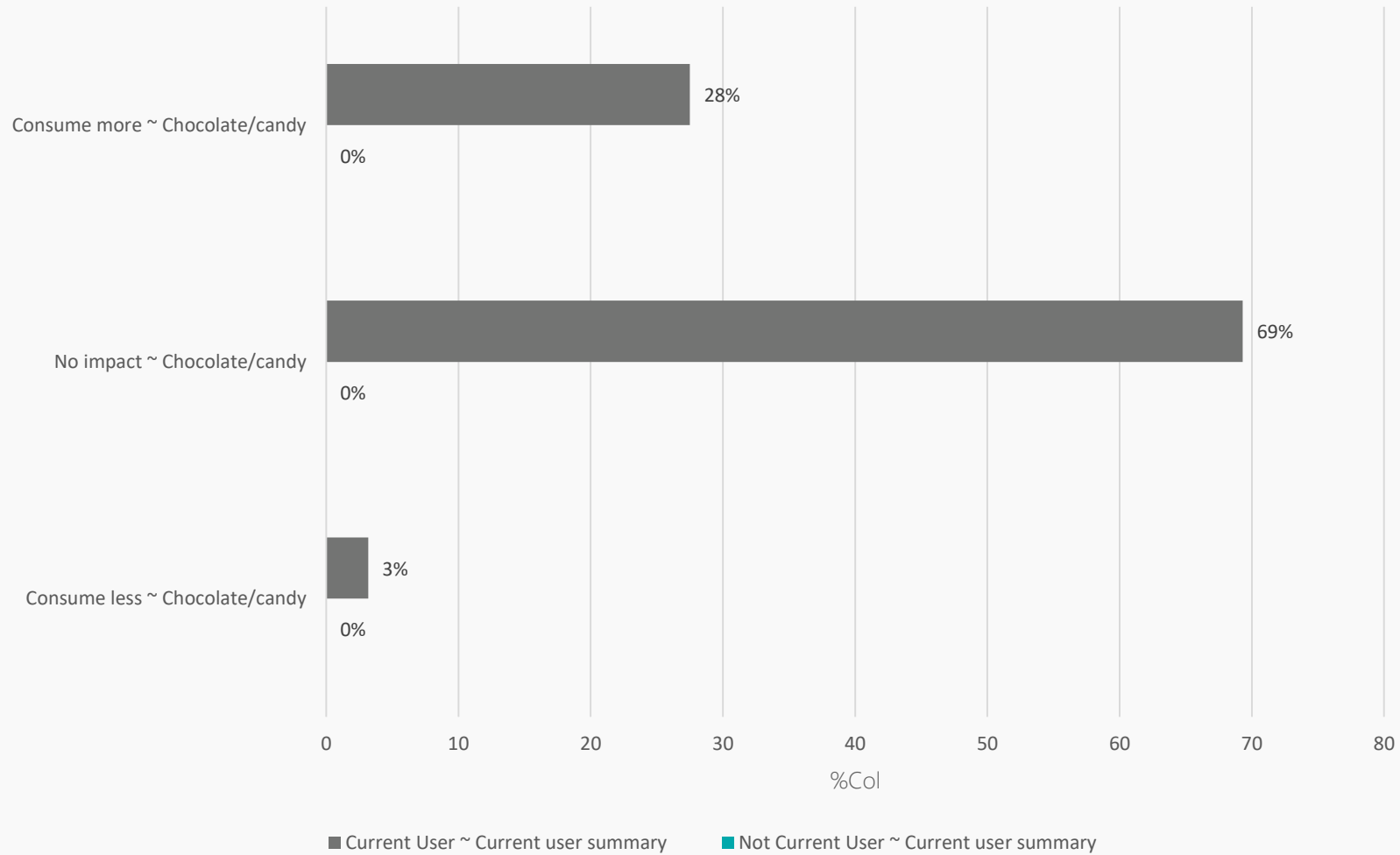
Other Forms/Products interested in



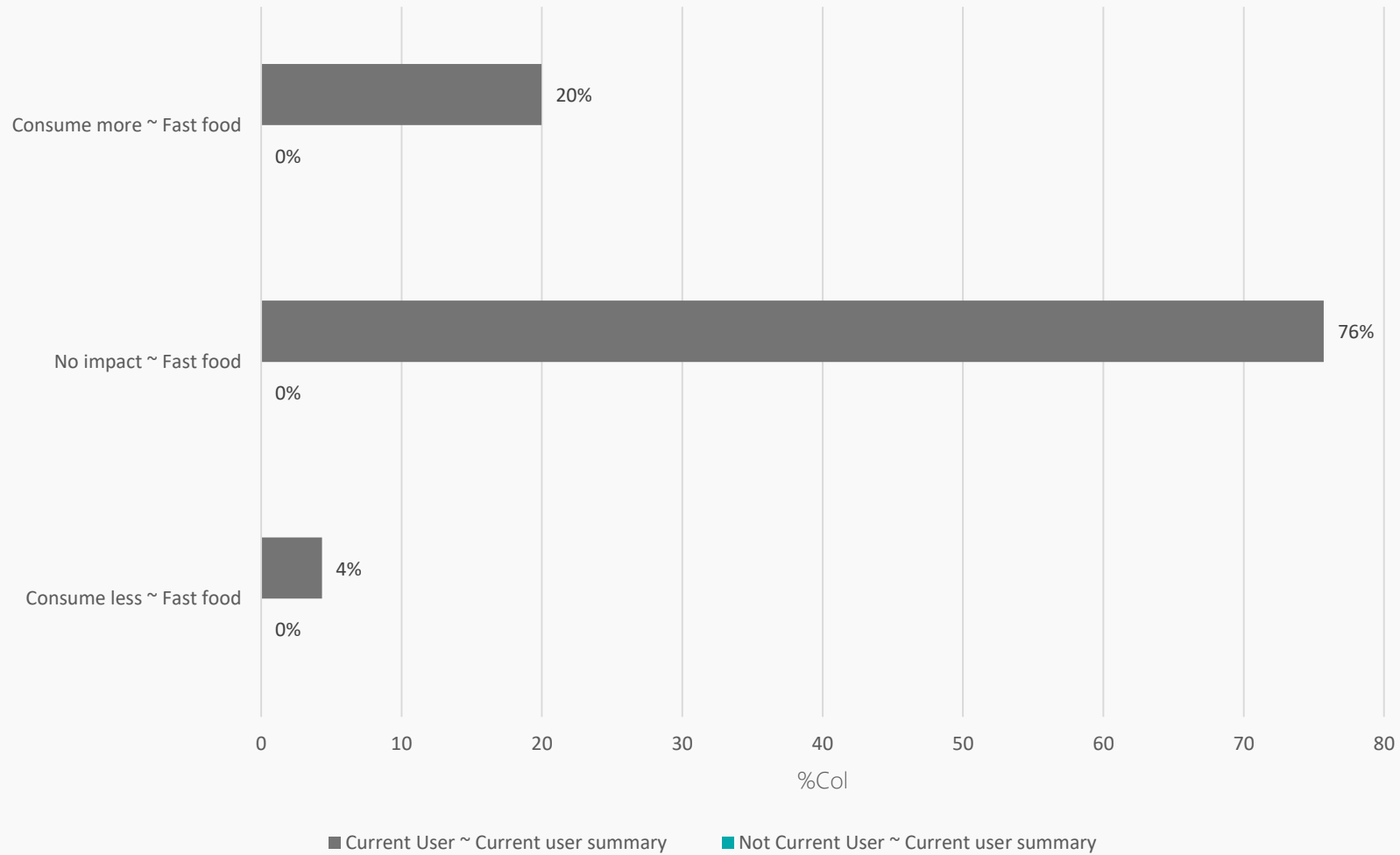
Salty snacks



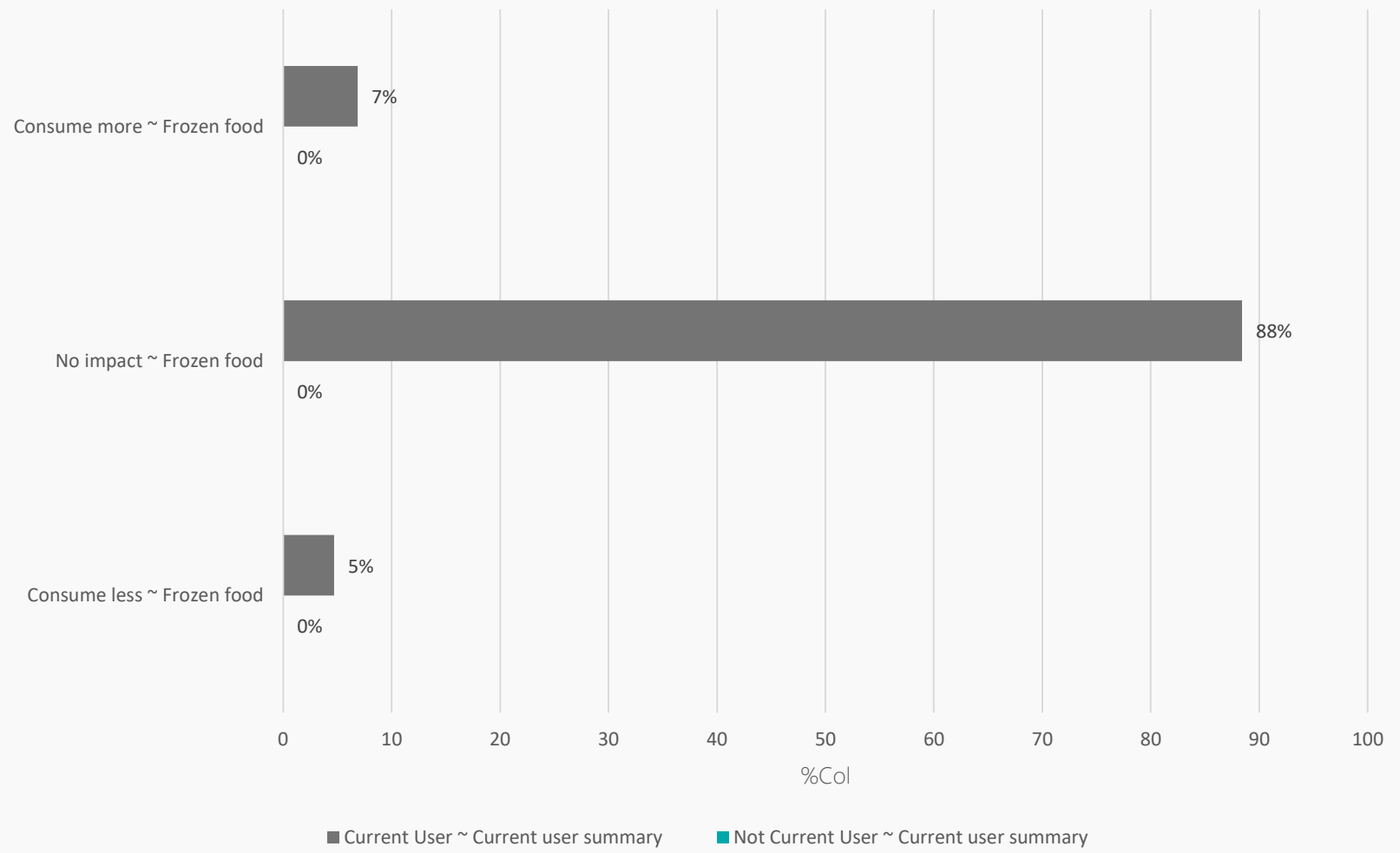
Chocolate/candy



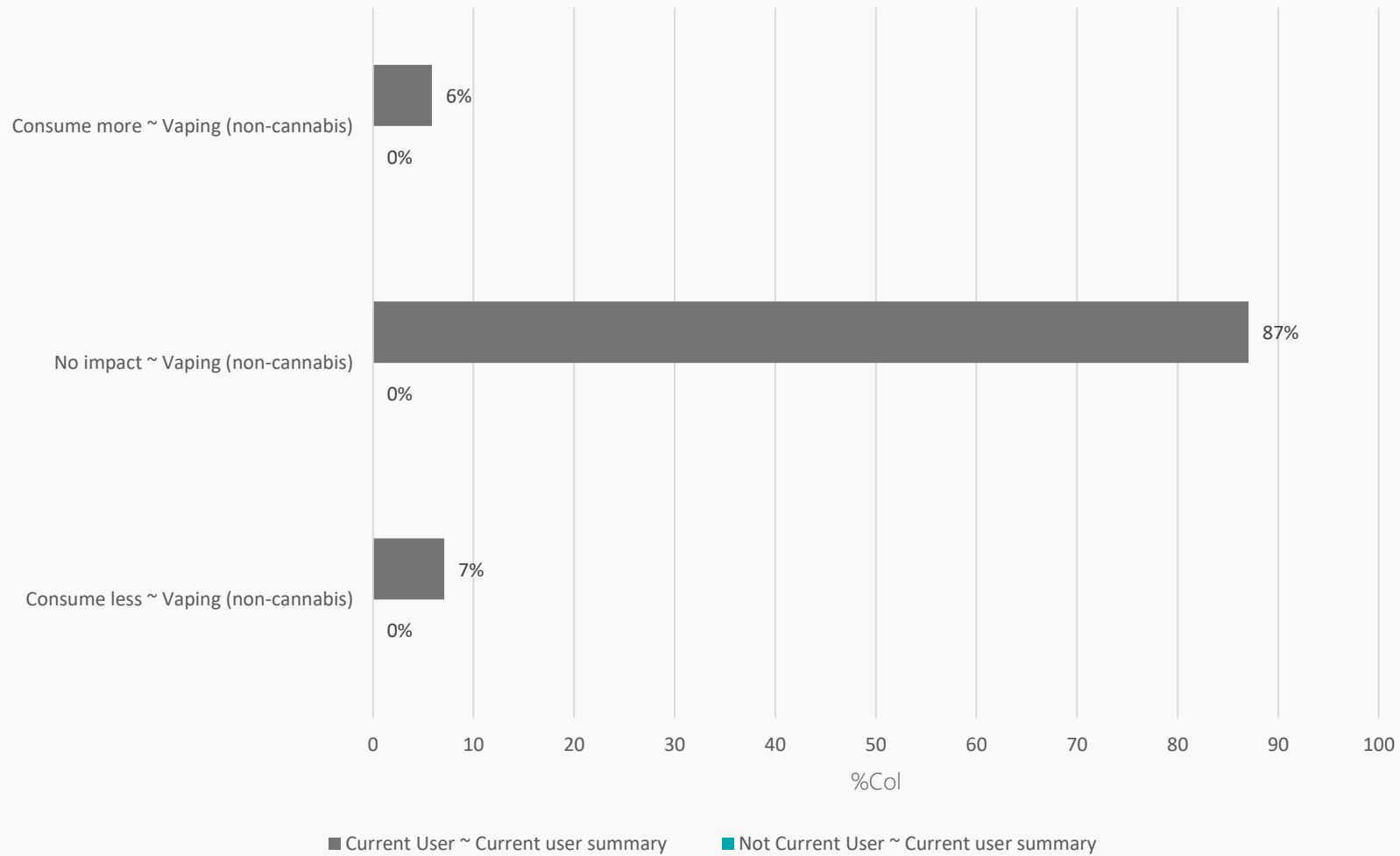
Fast food



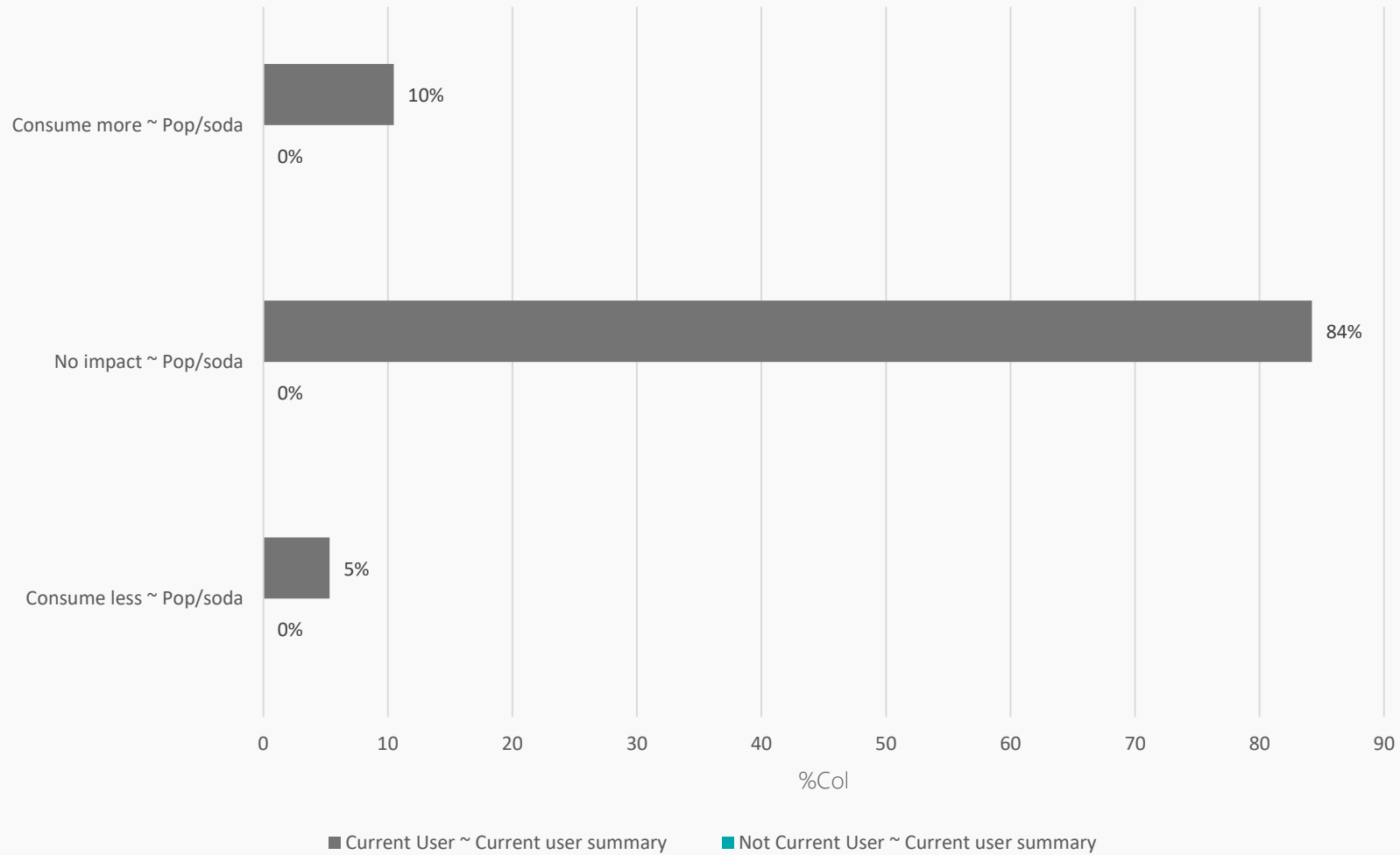
Frozen food



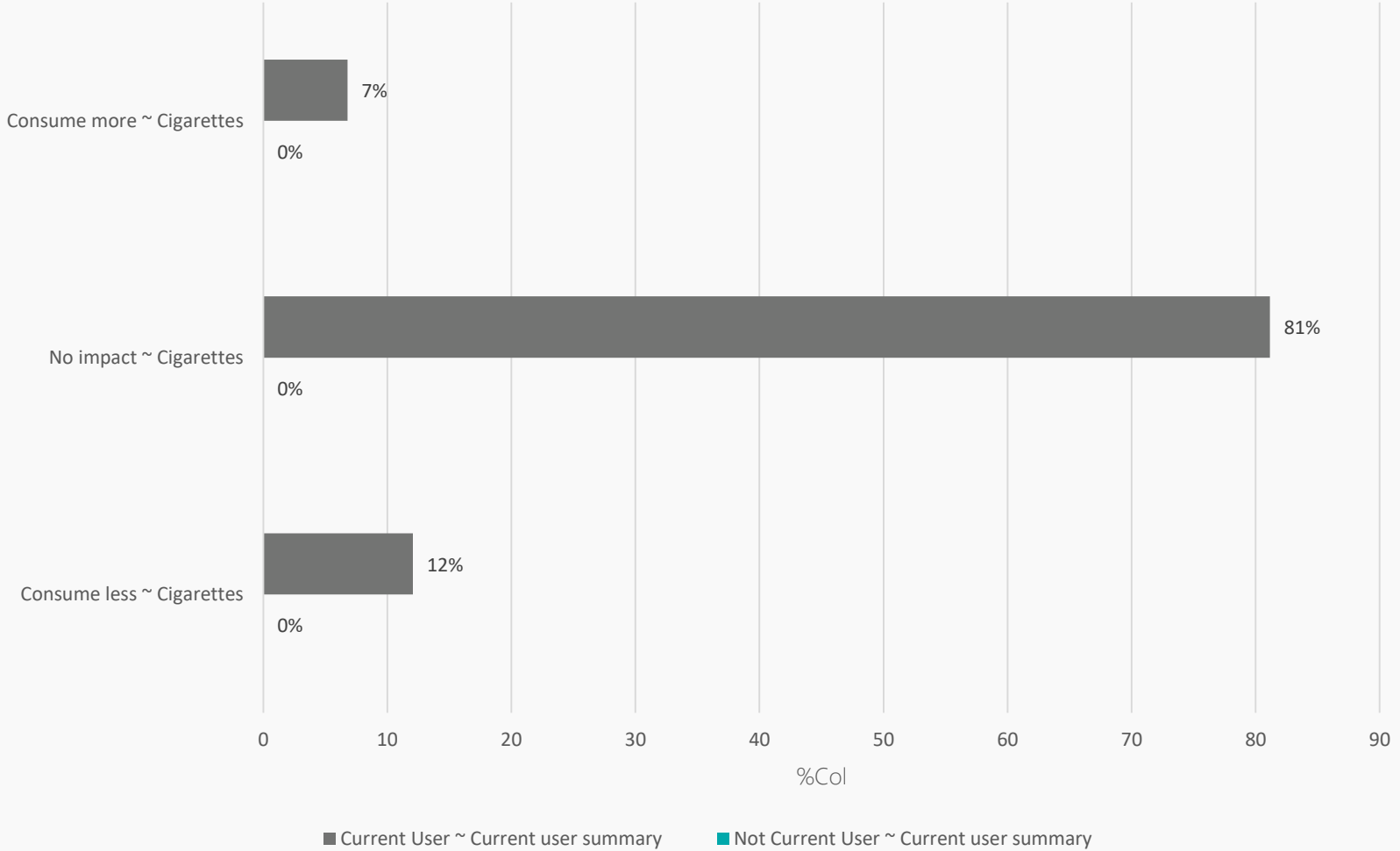
Vaping (non-cannabis)



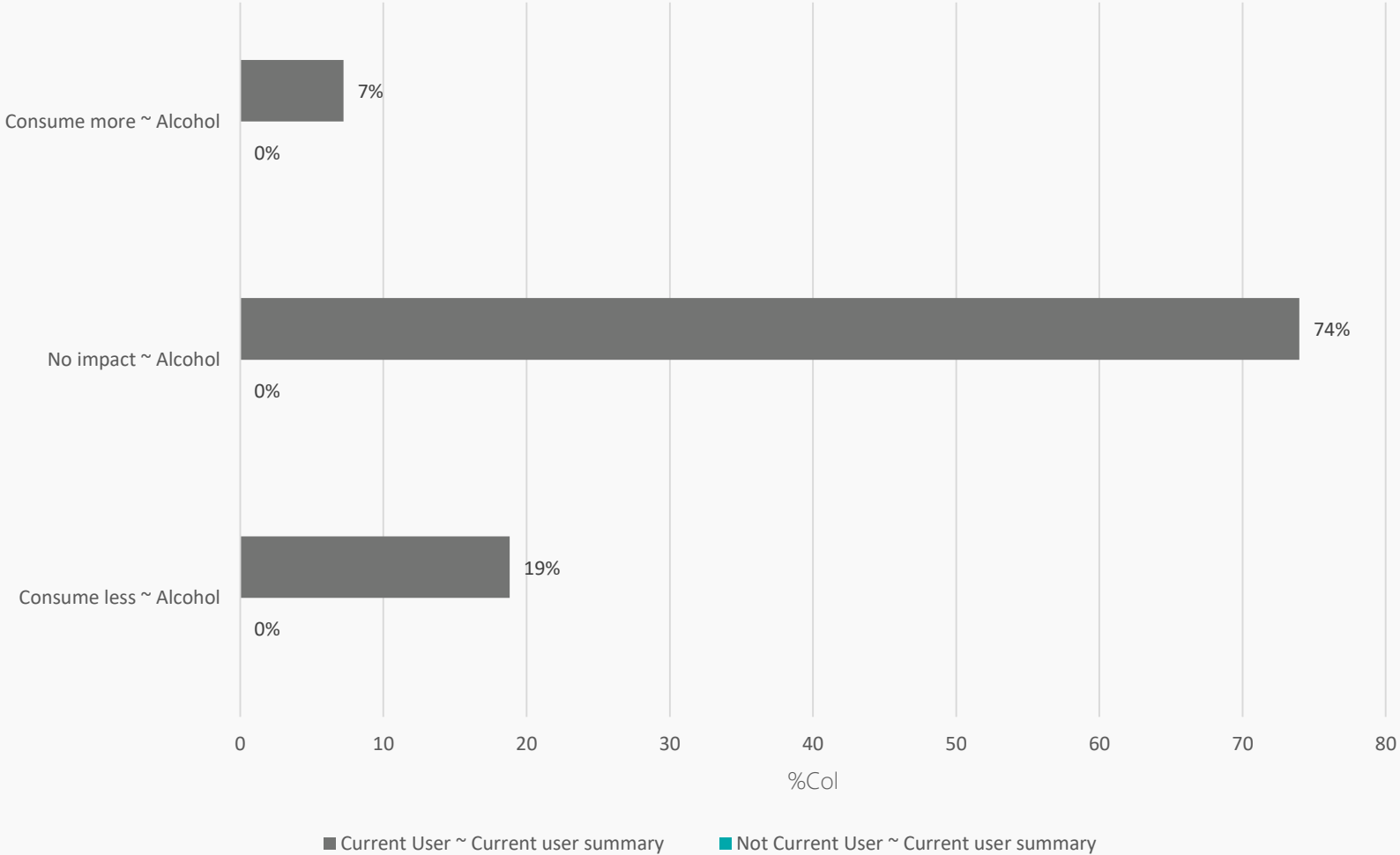
Pop/soda



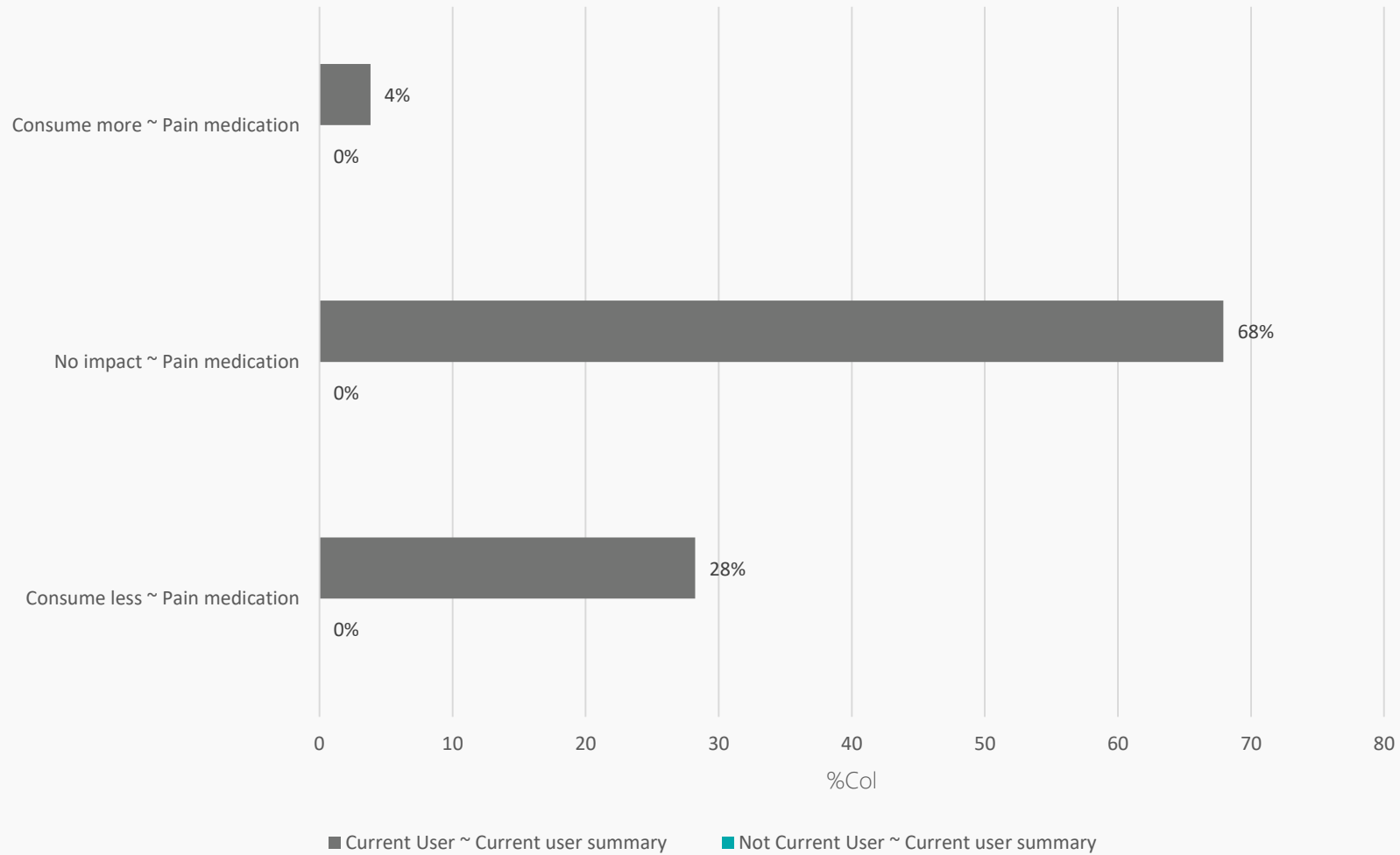
Cigarettes



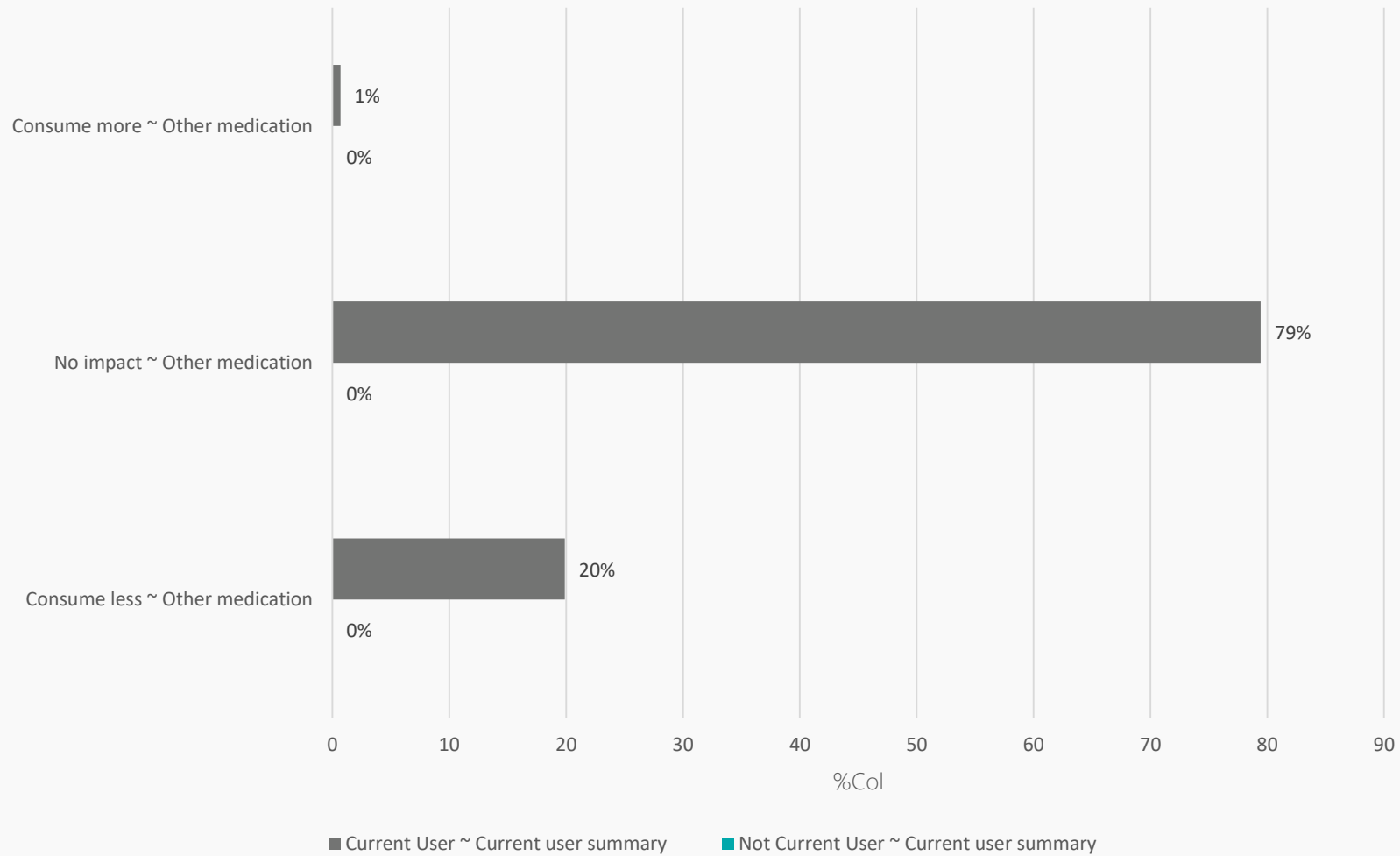
Alcohol



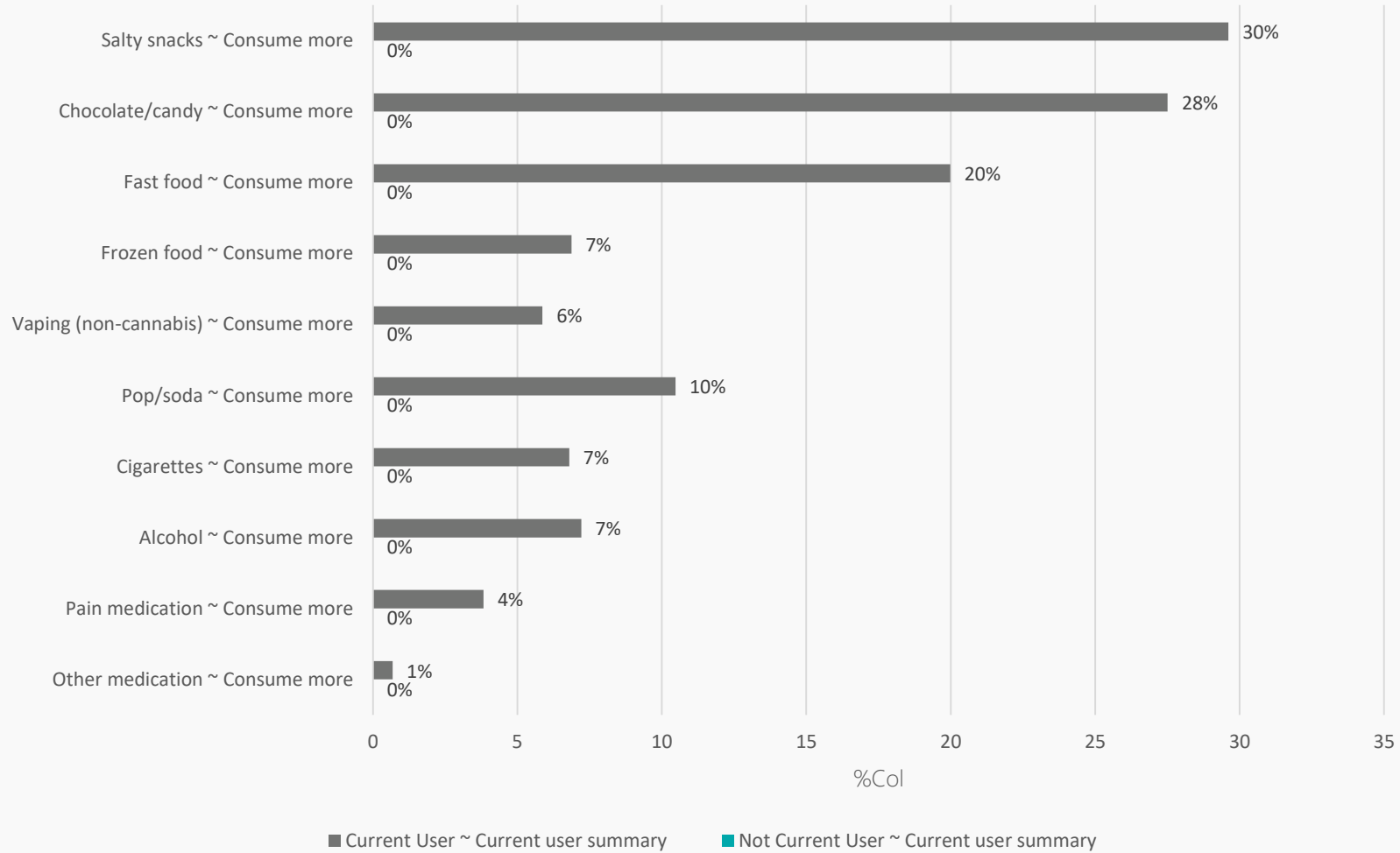
Pain medication



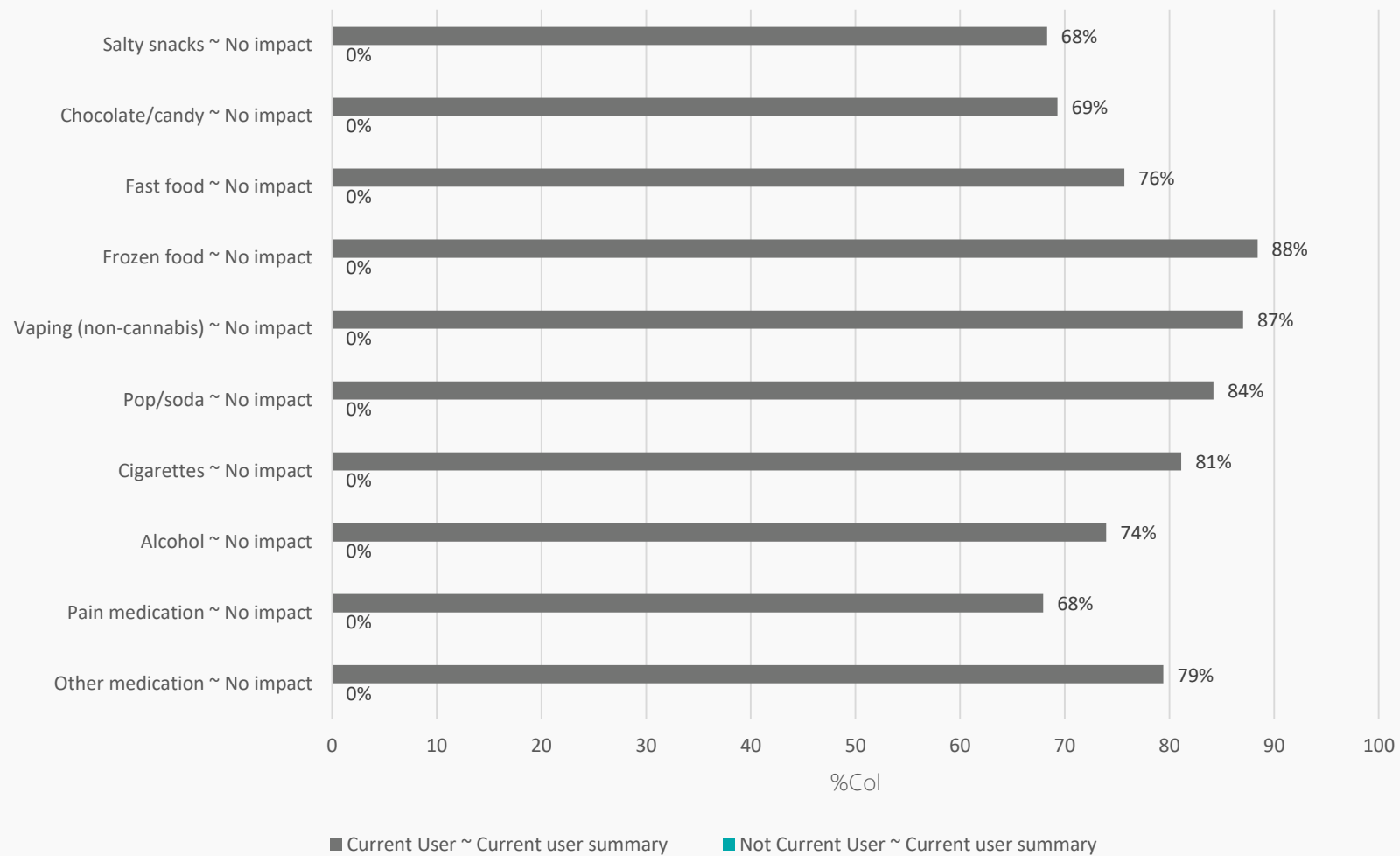
Other medication



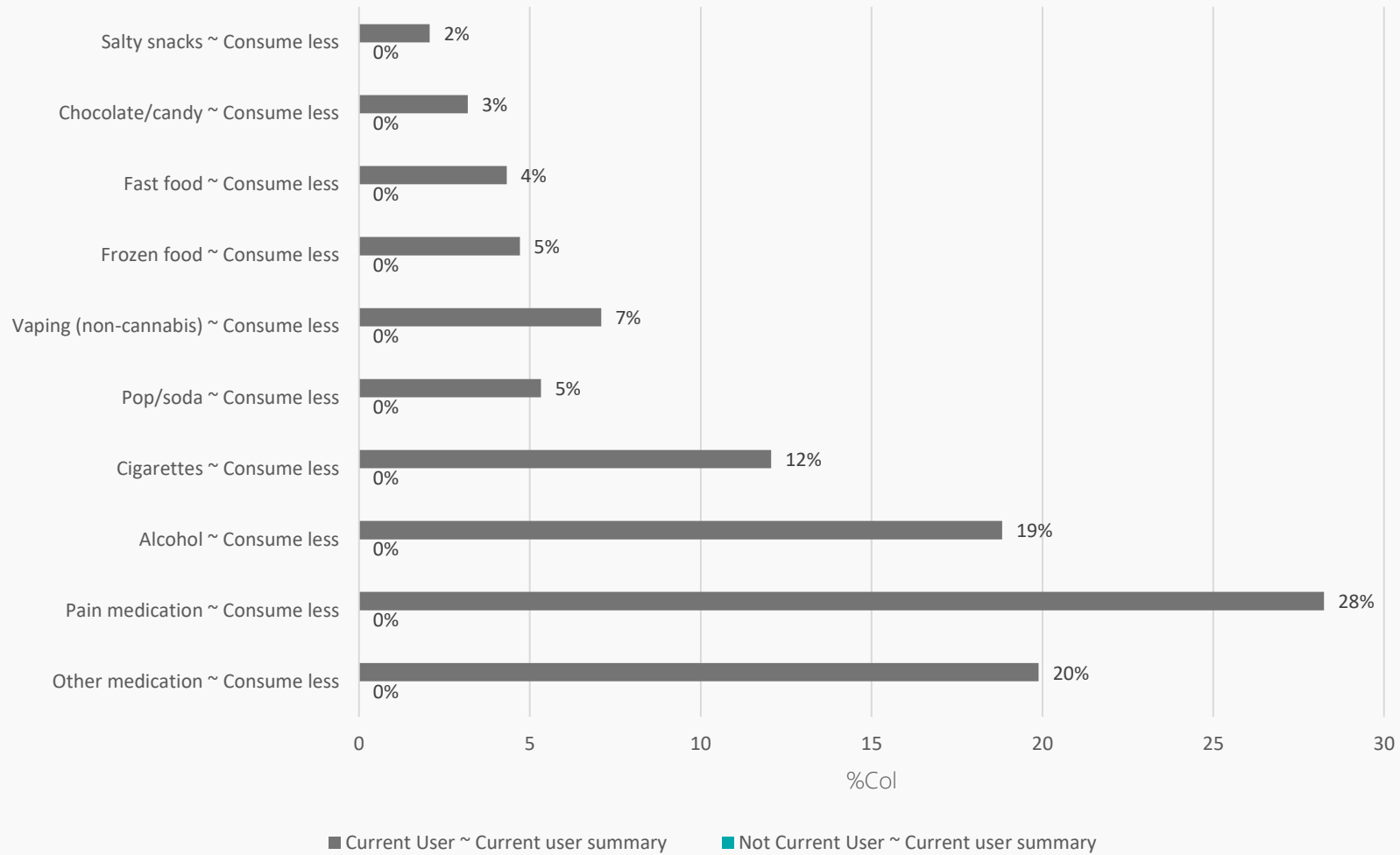
Consume more



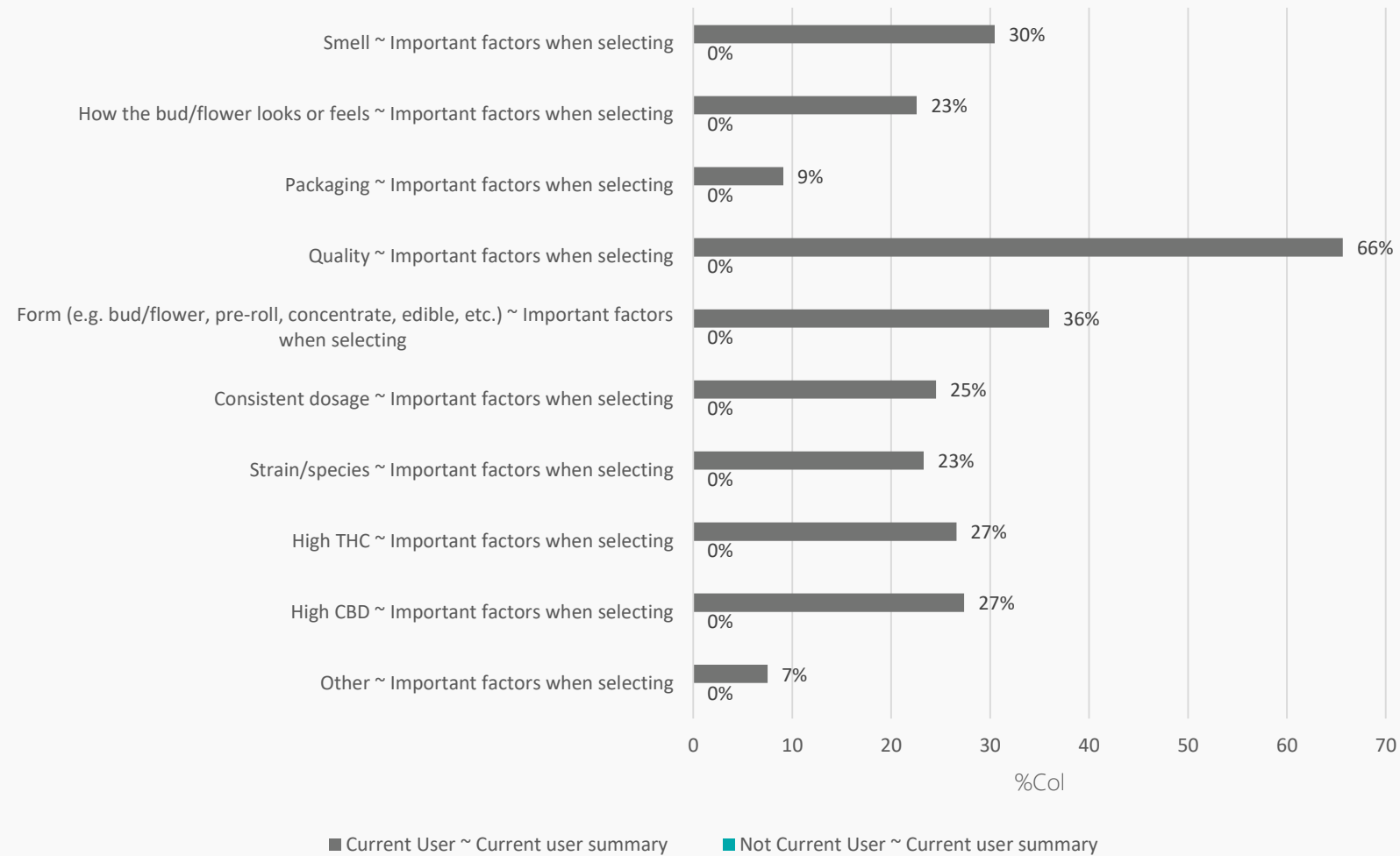
No impact



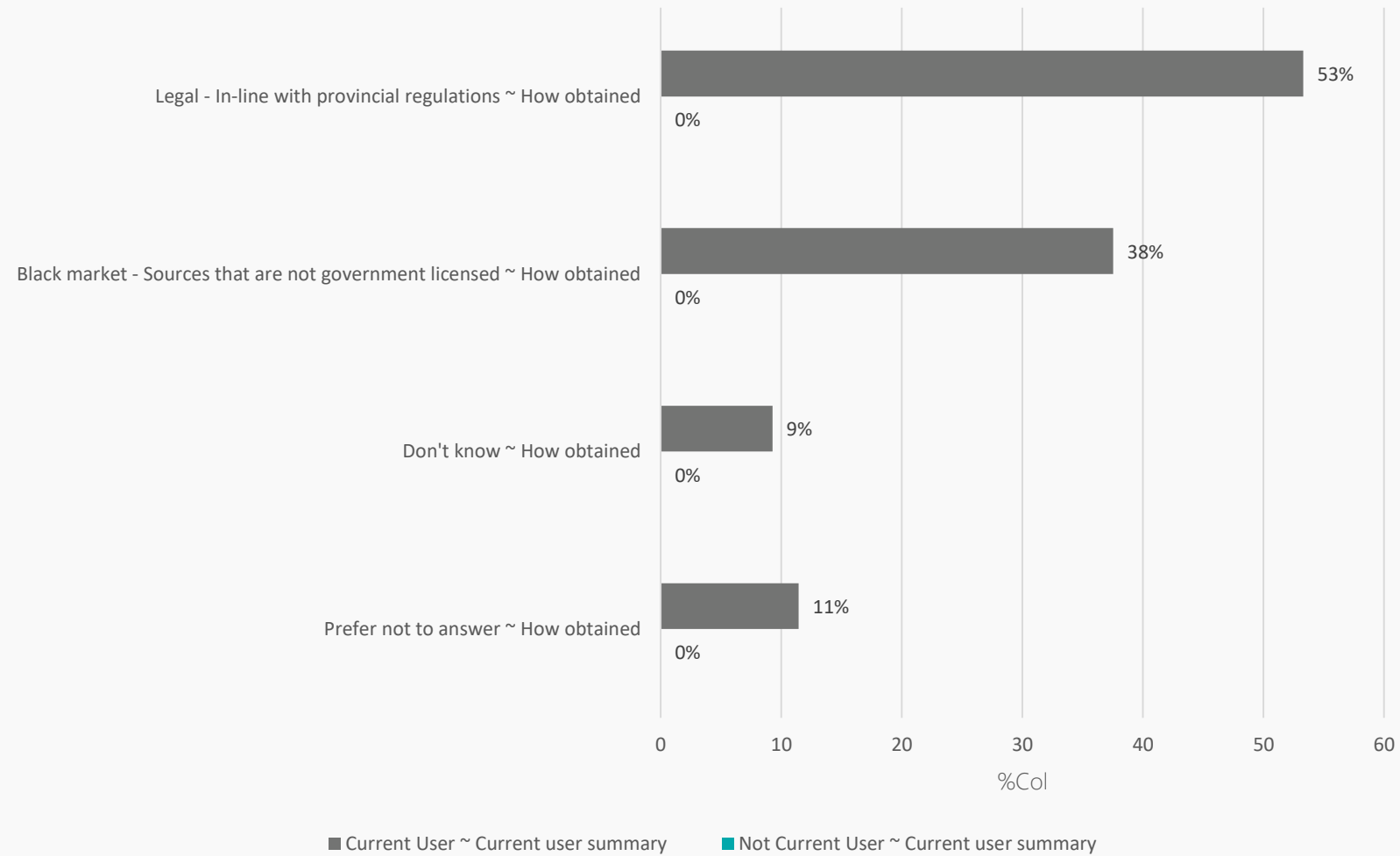
Consume less



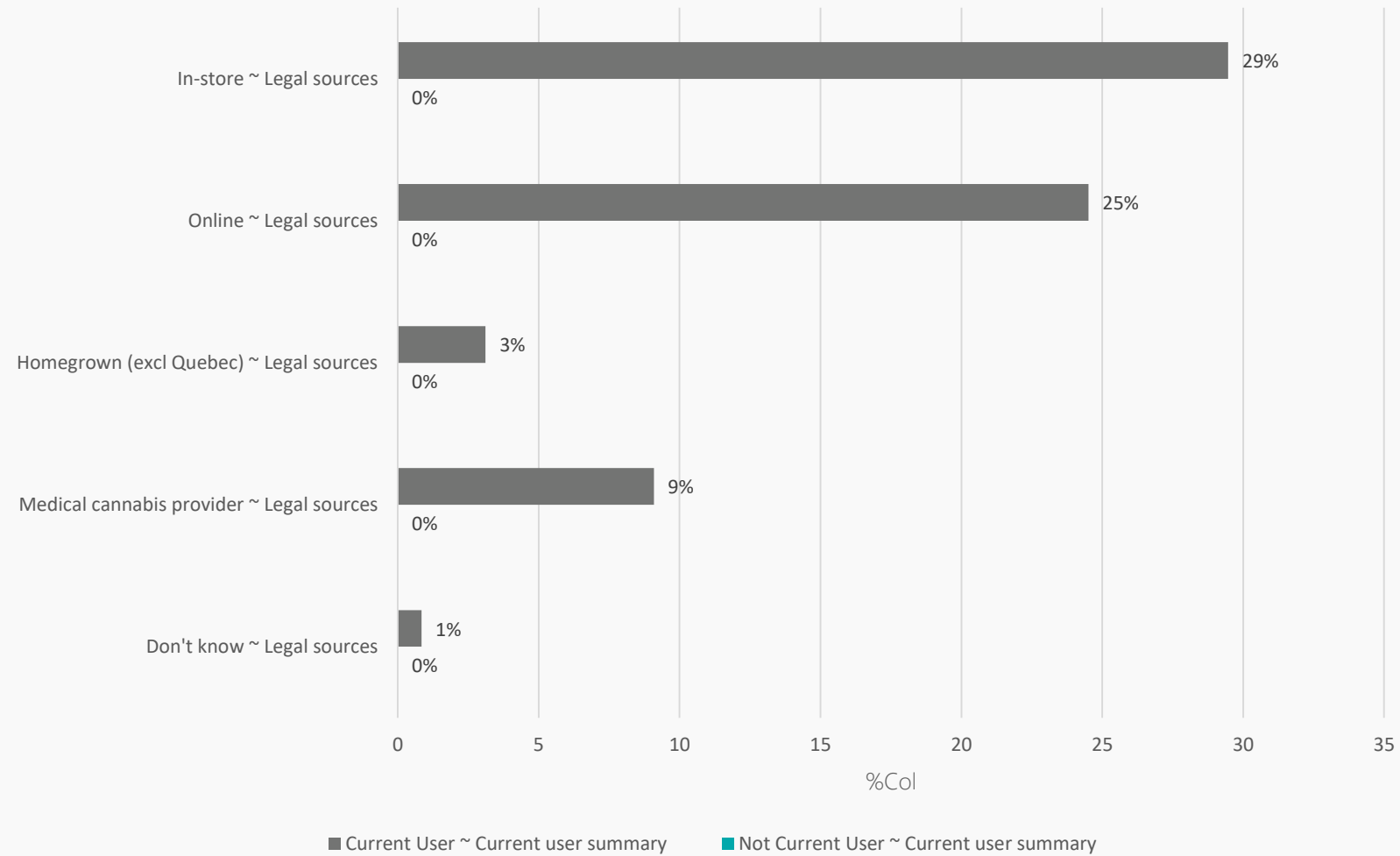
Important factors when selecting



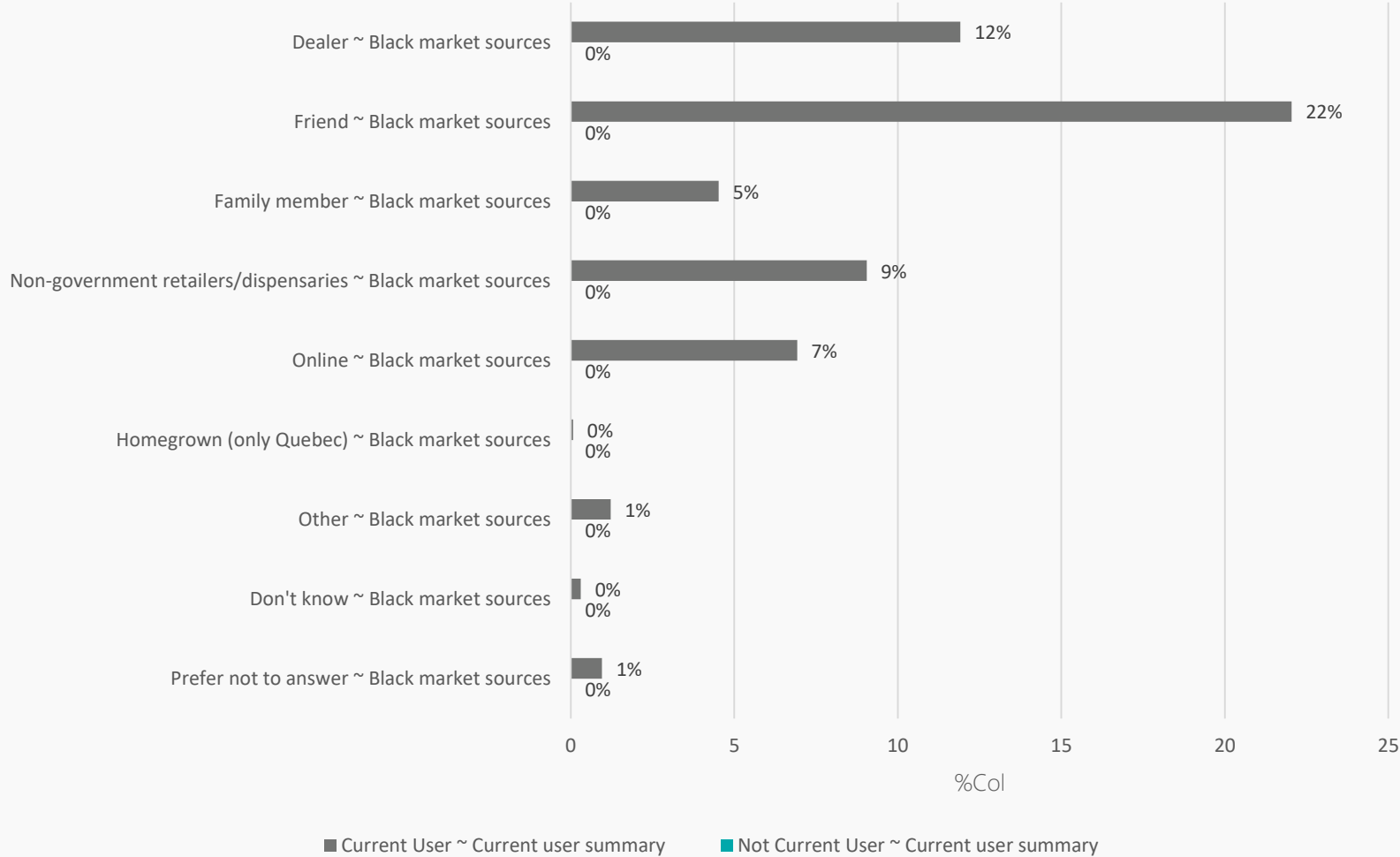
How obtained



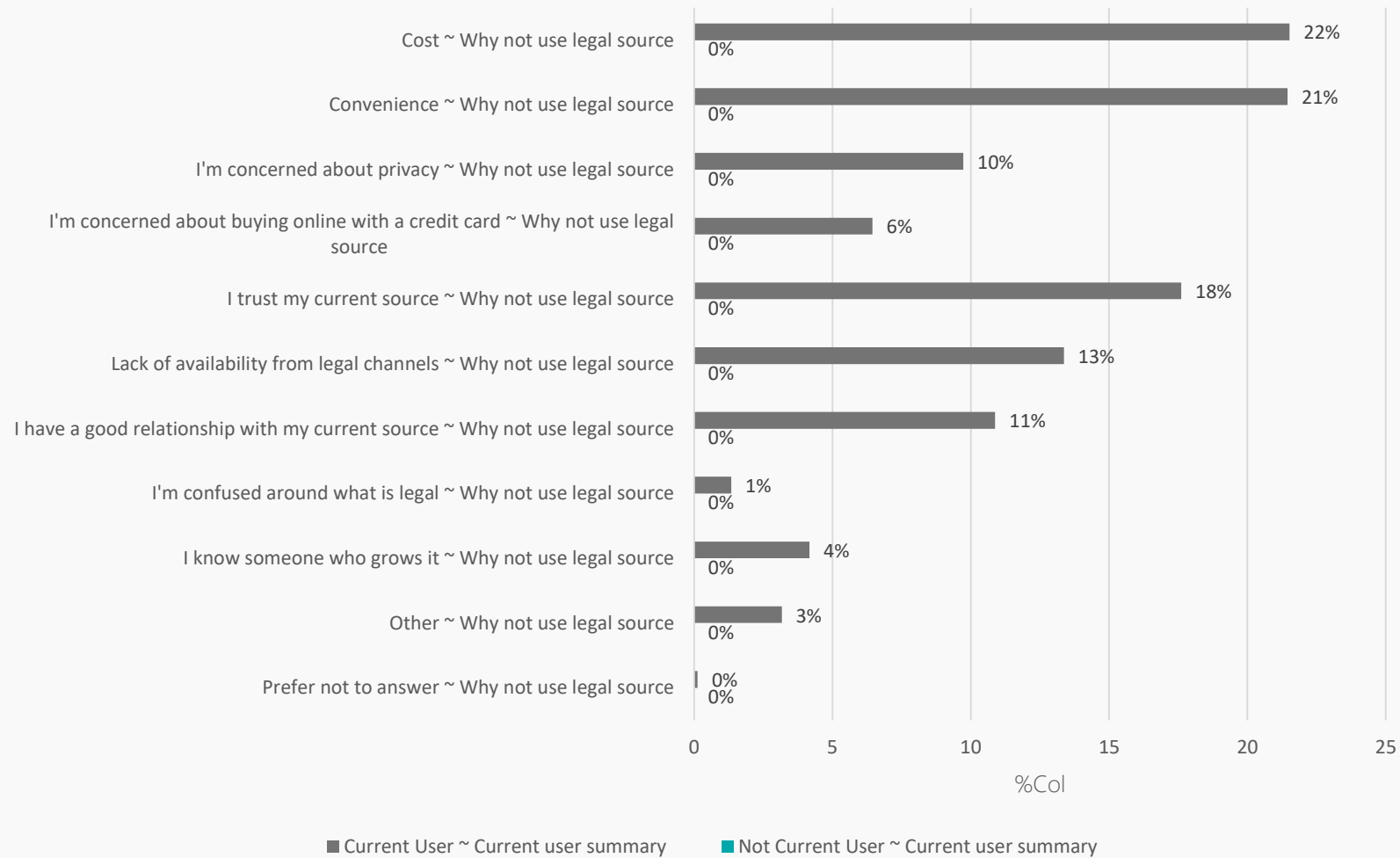
Legal sources



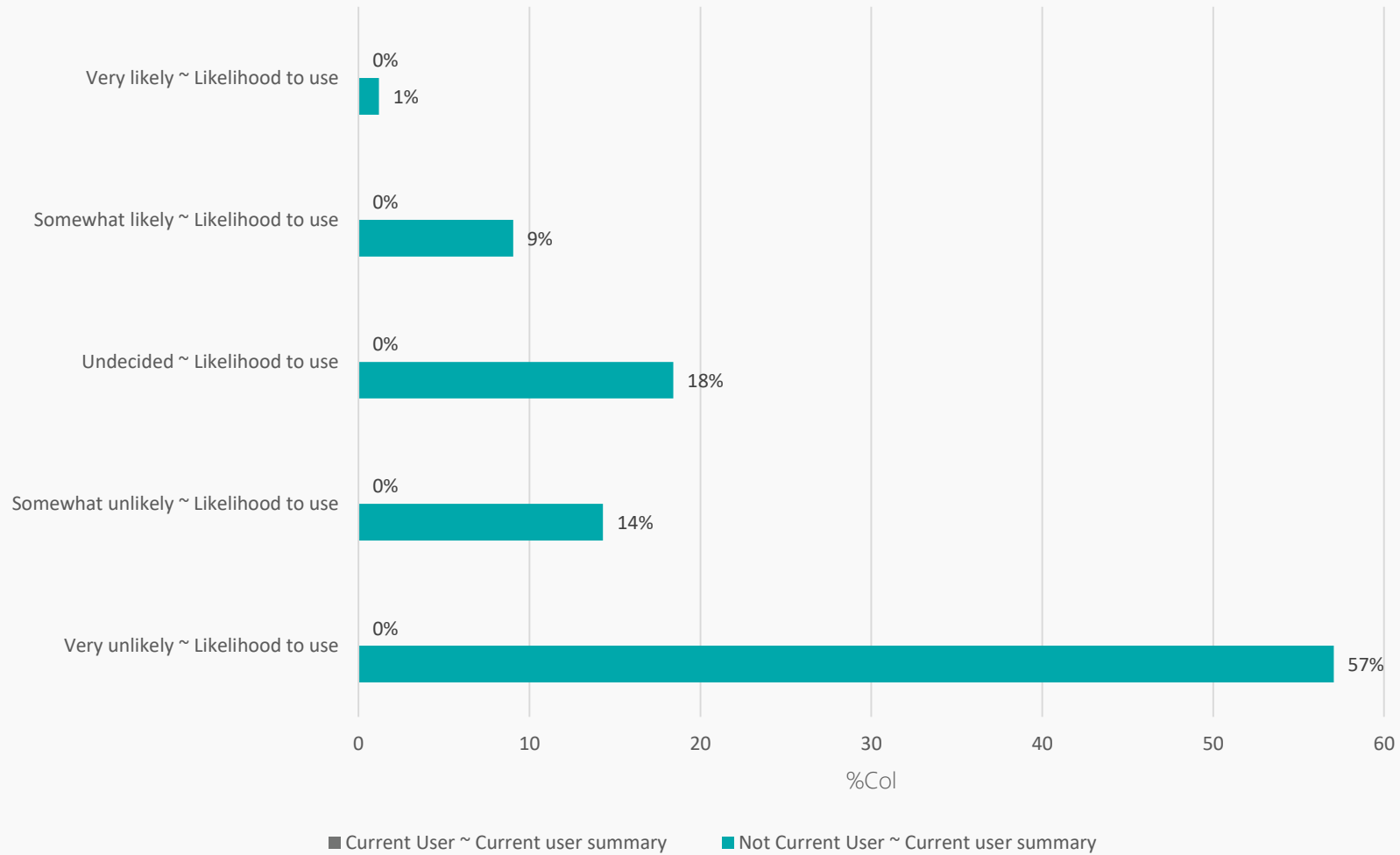
Black market sources



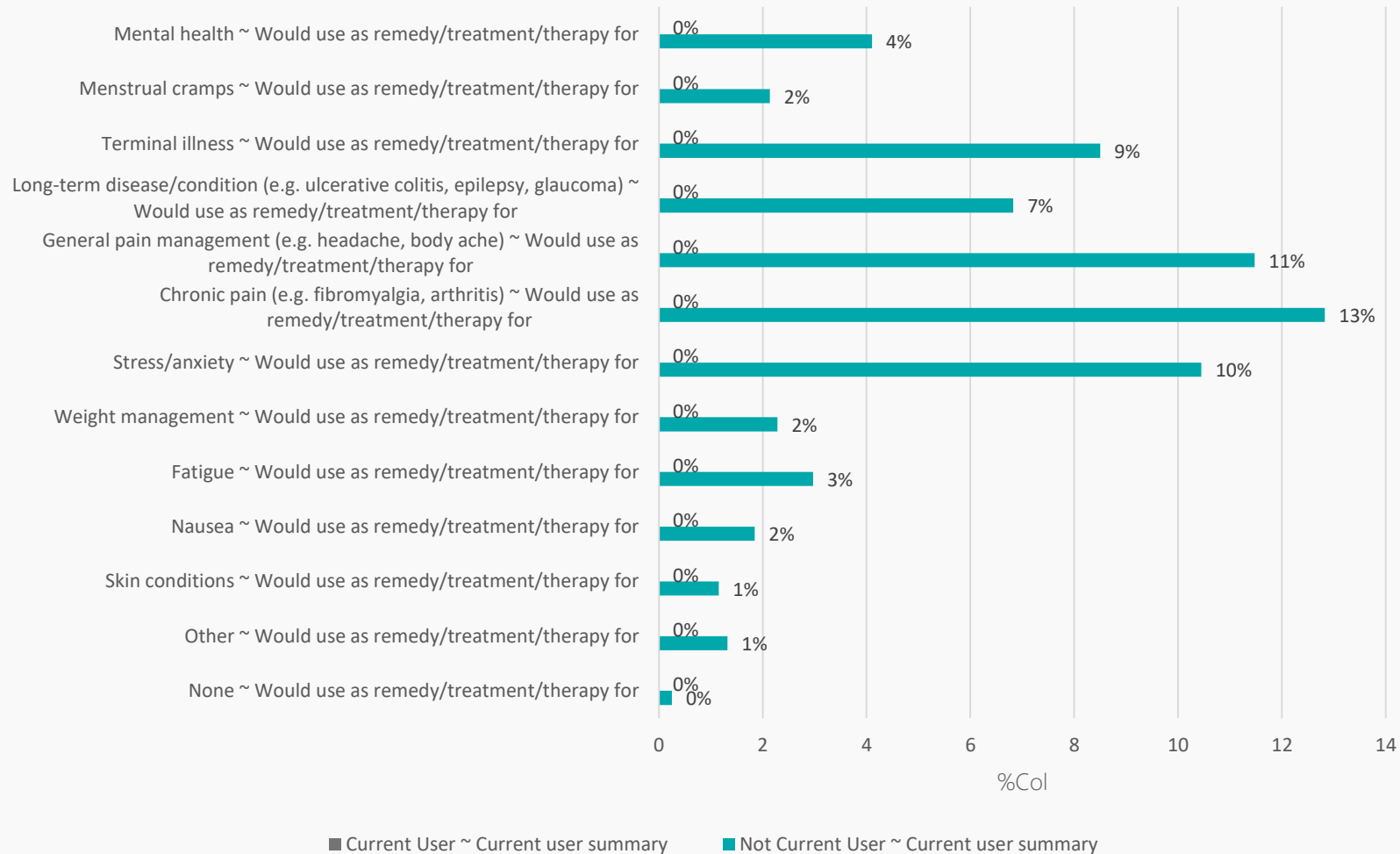
Why not use legal source



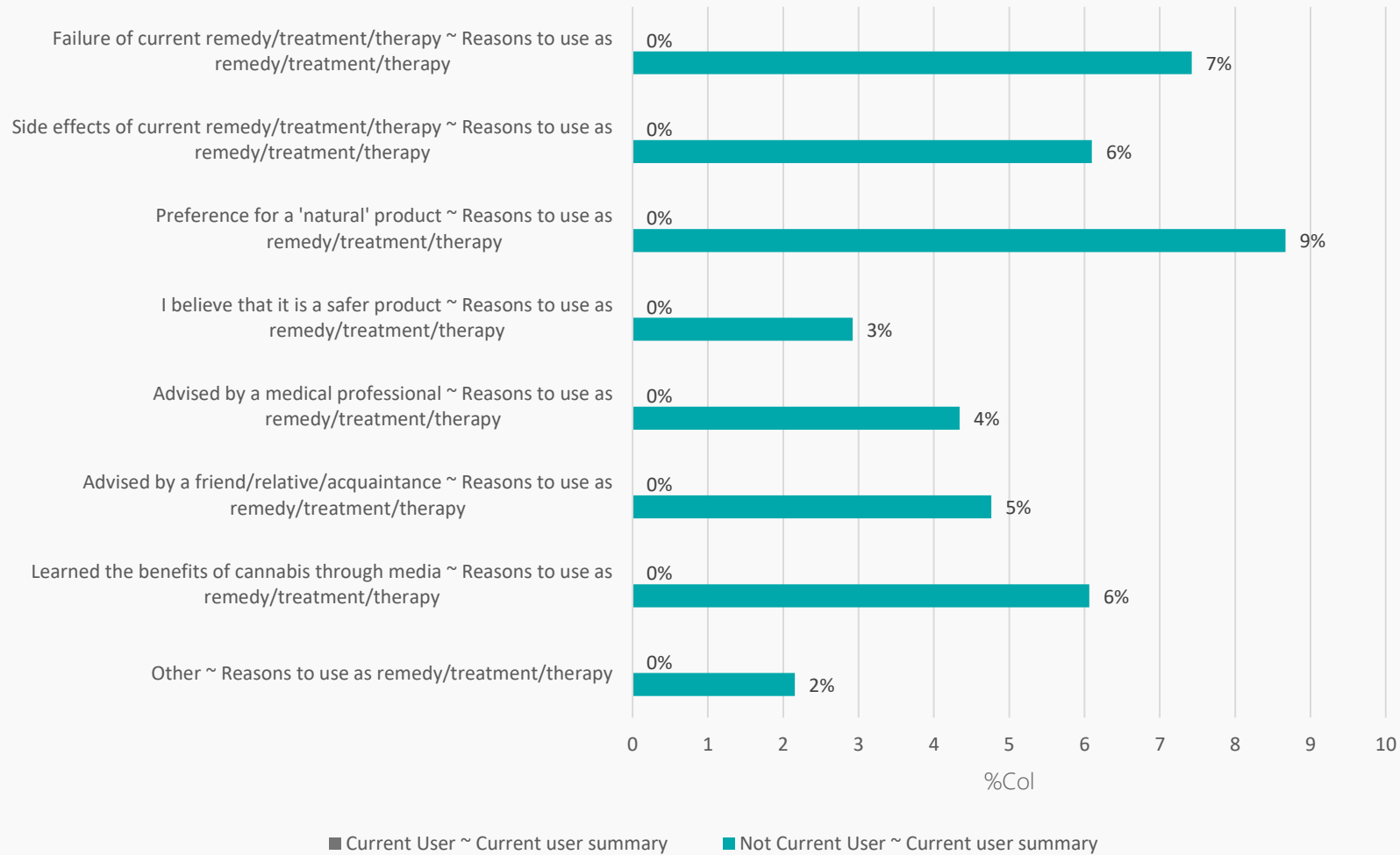
Likelihood to use



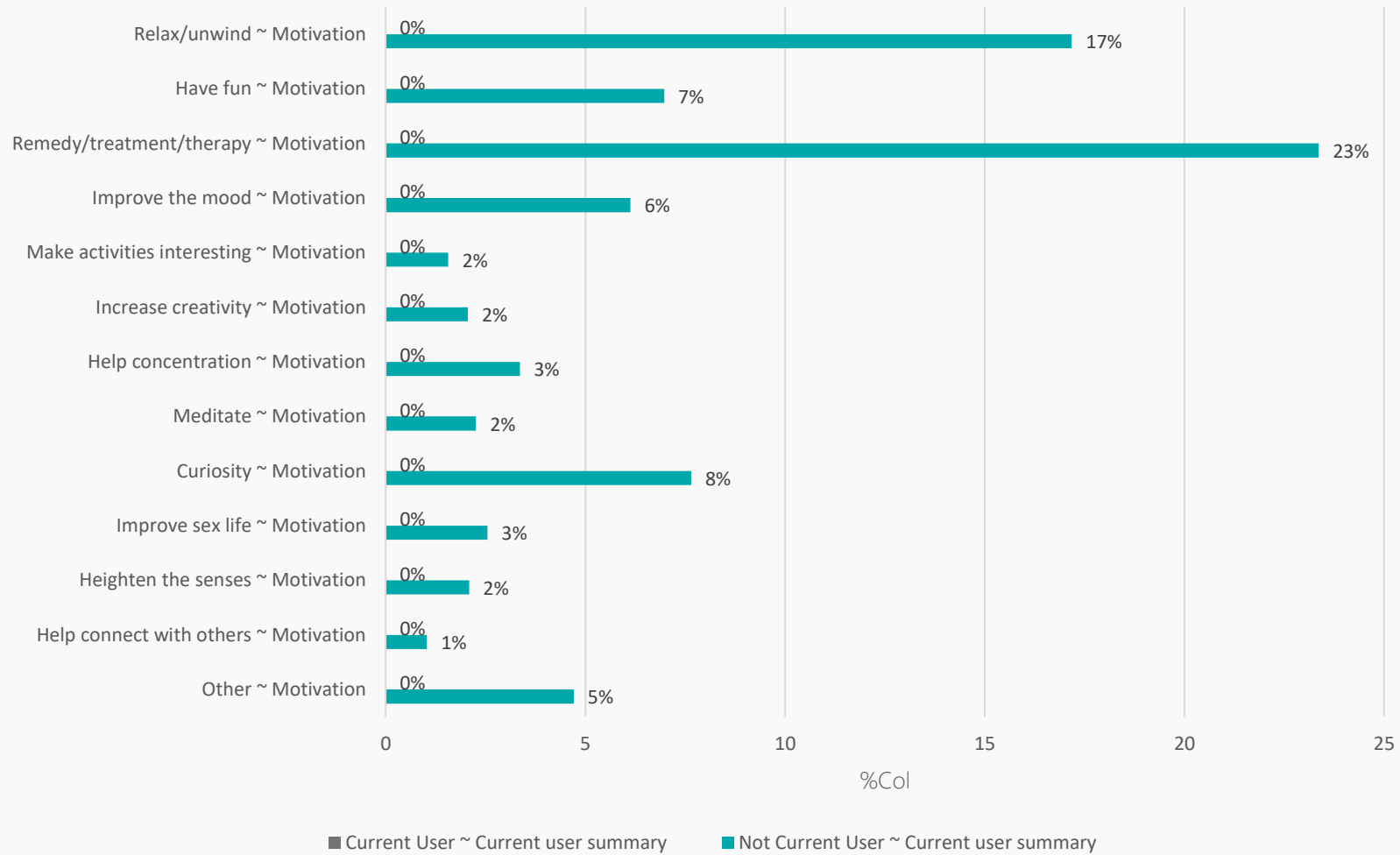
Would use as remedy/treatment/therapy for



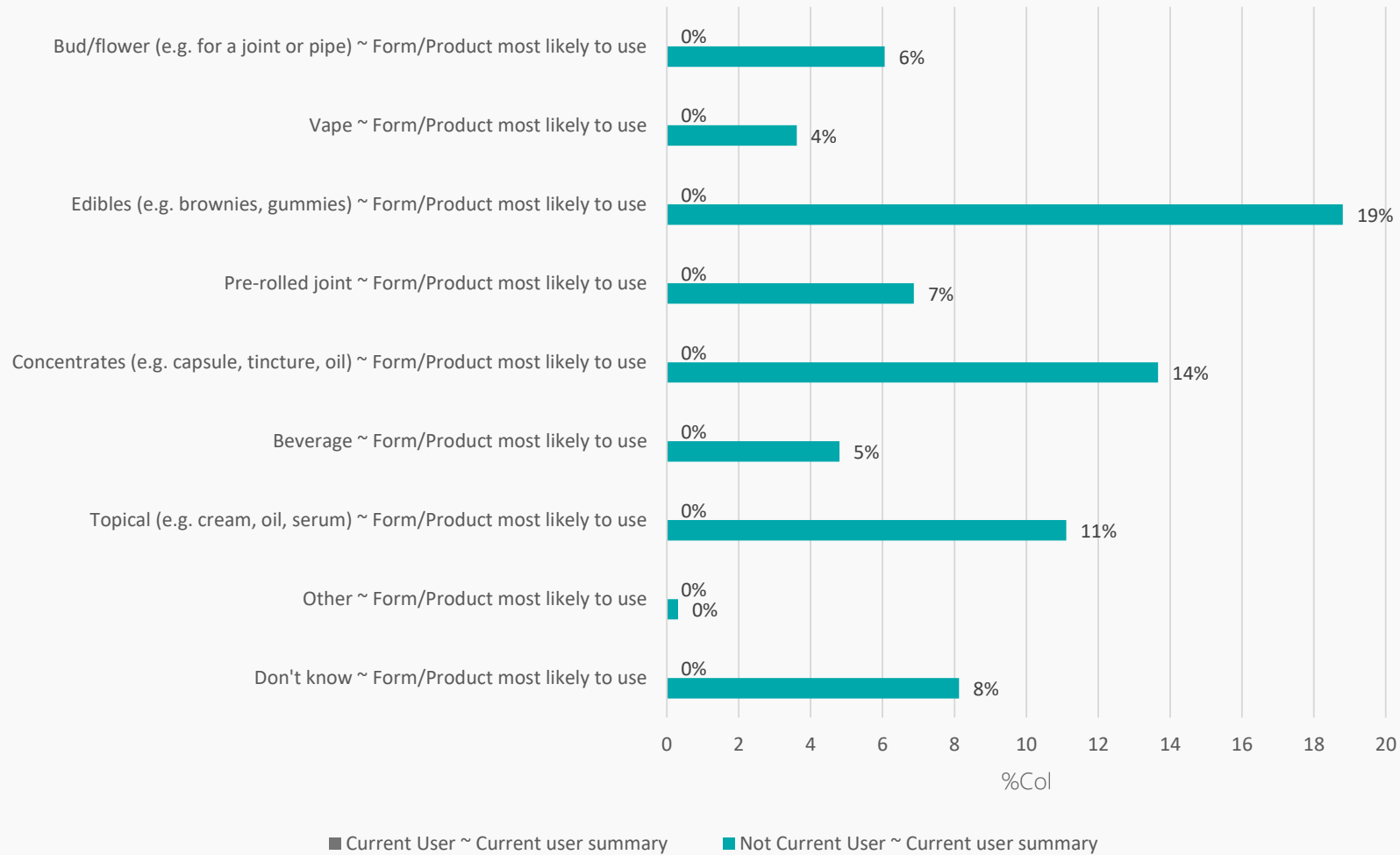
Reasons to use as remedy/treatment/therapy



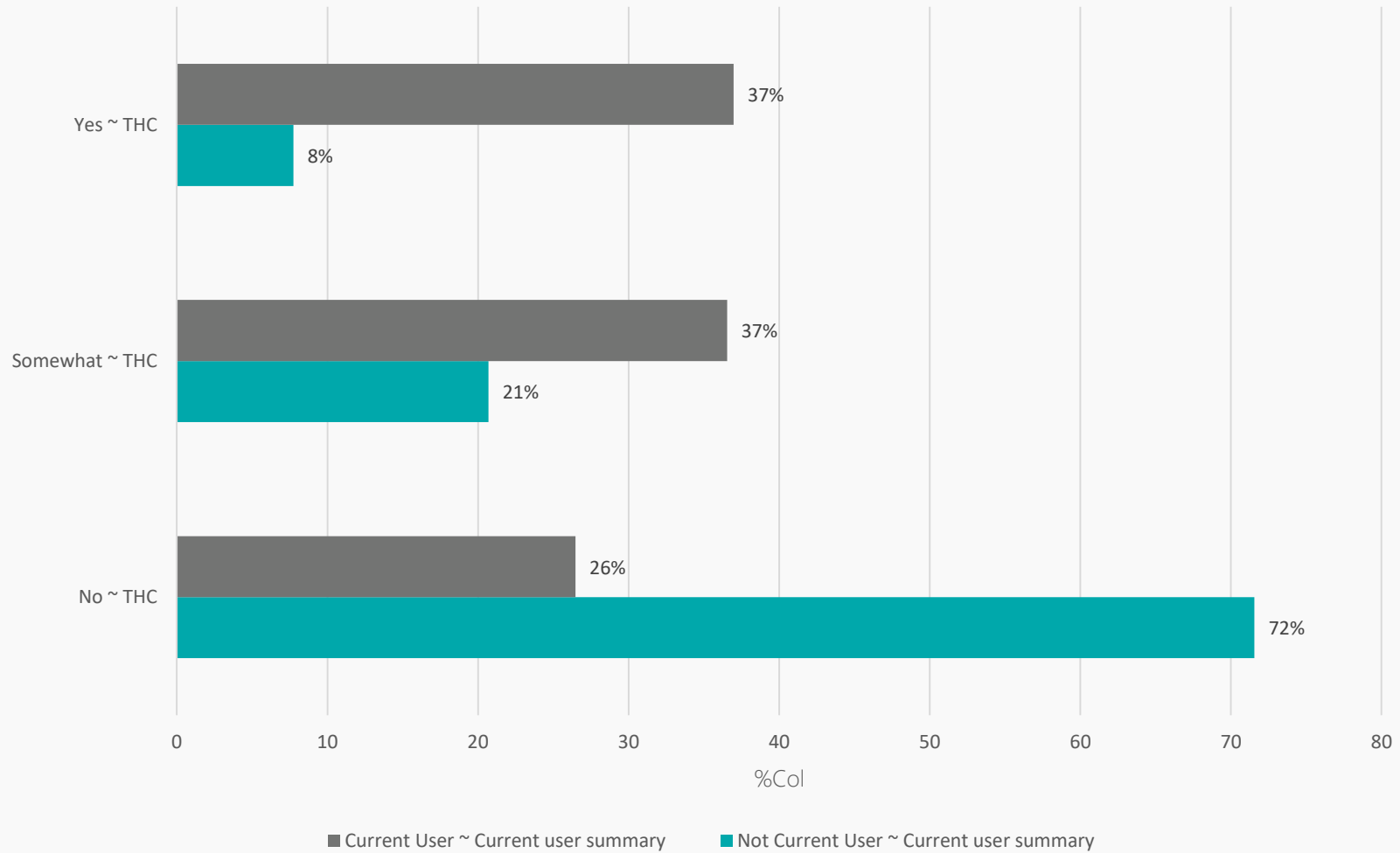
Motivation



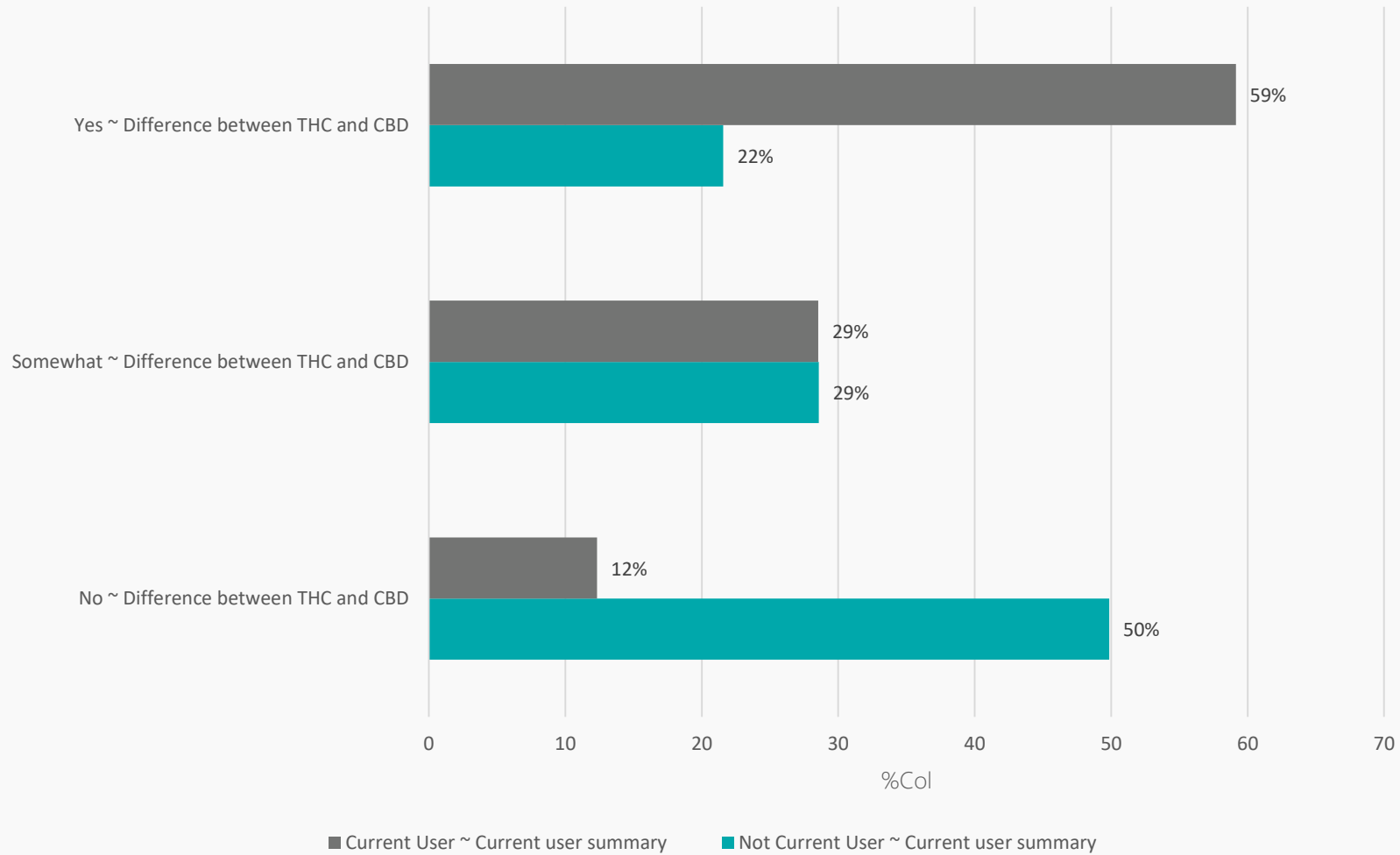
Form/Product most likely to use



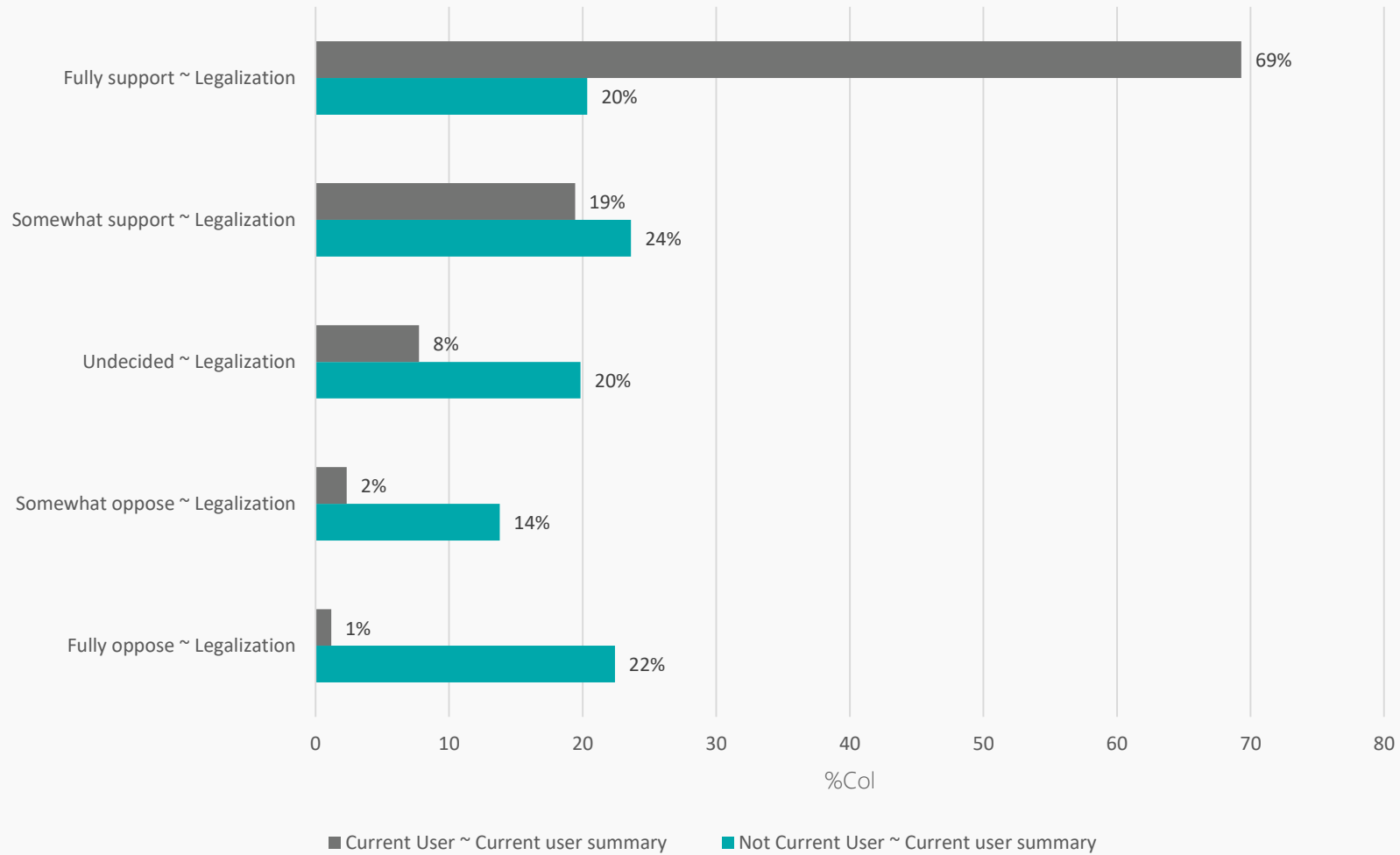
THC



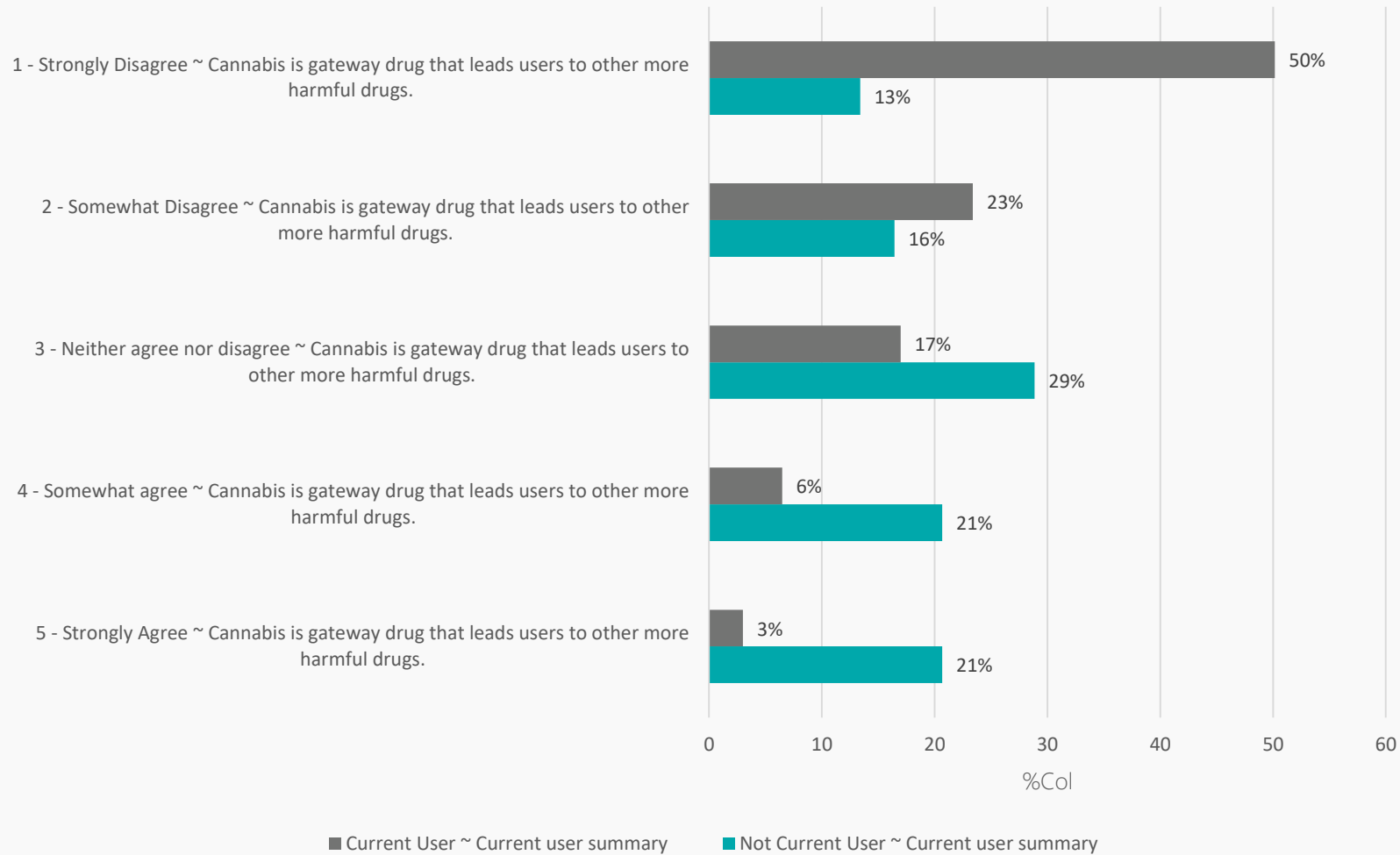
Difference between THC and CBD



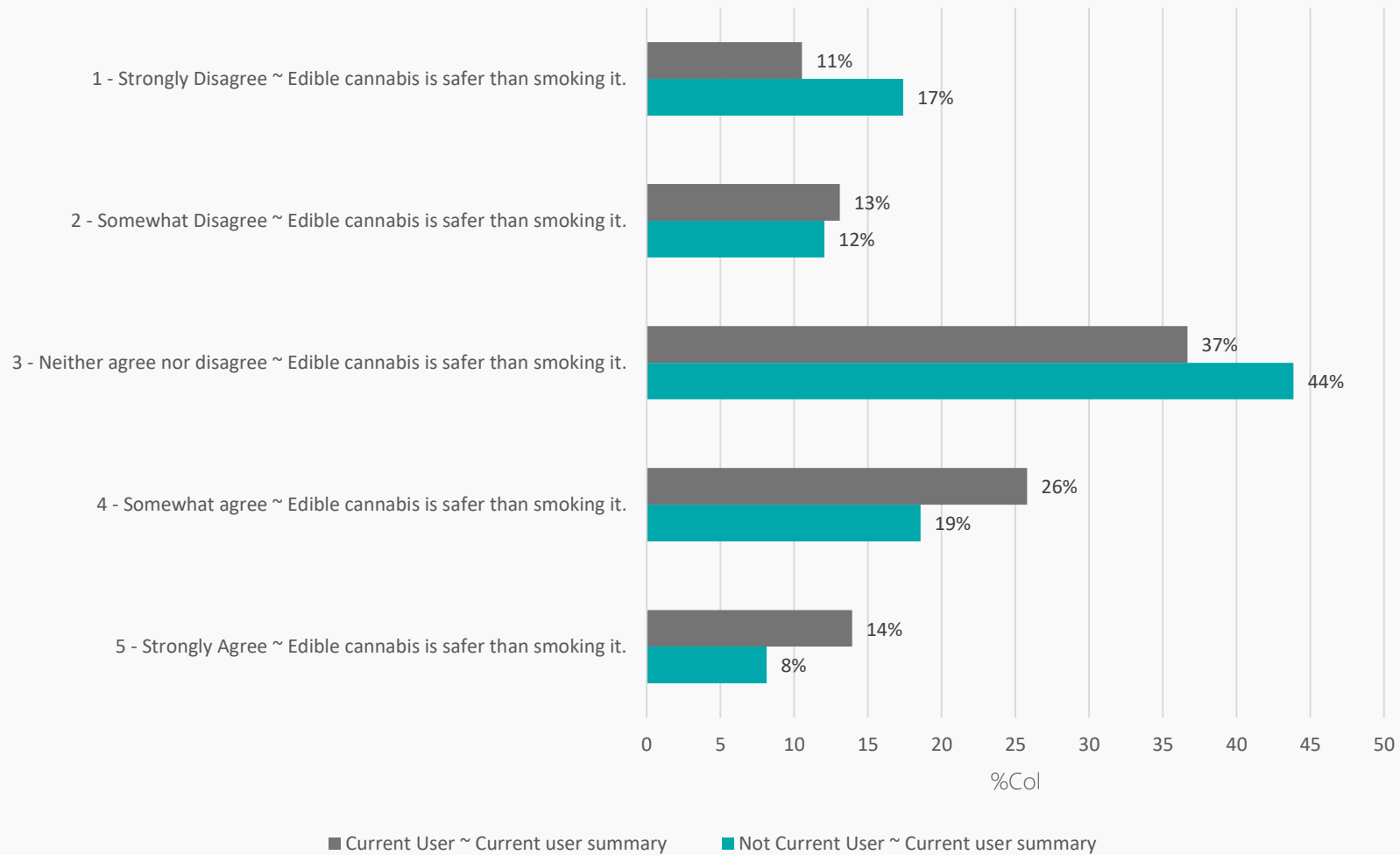
Legalization



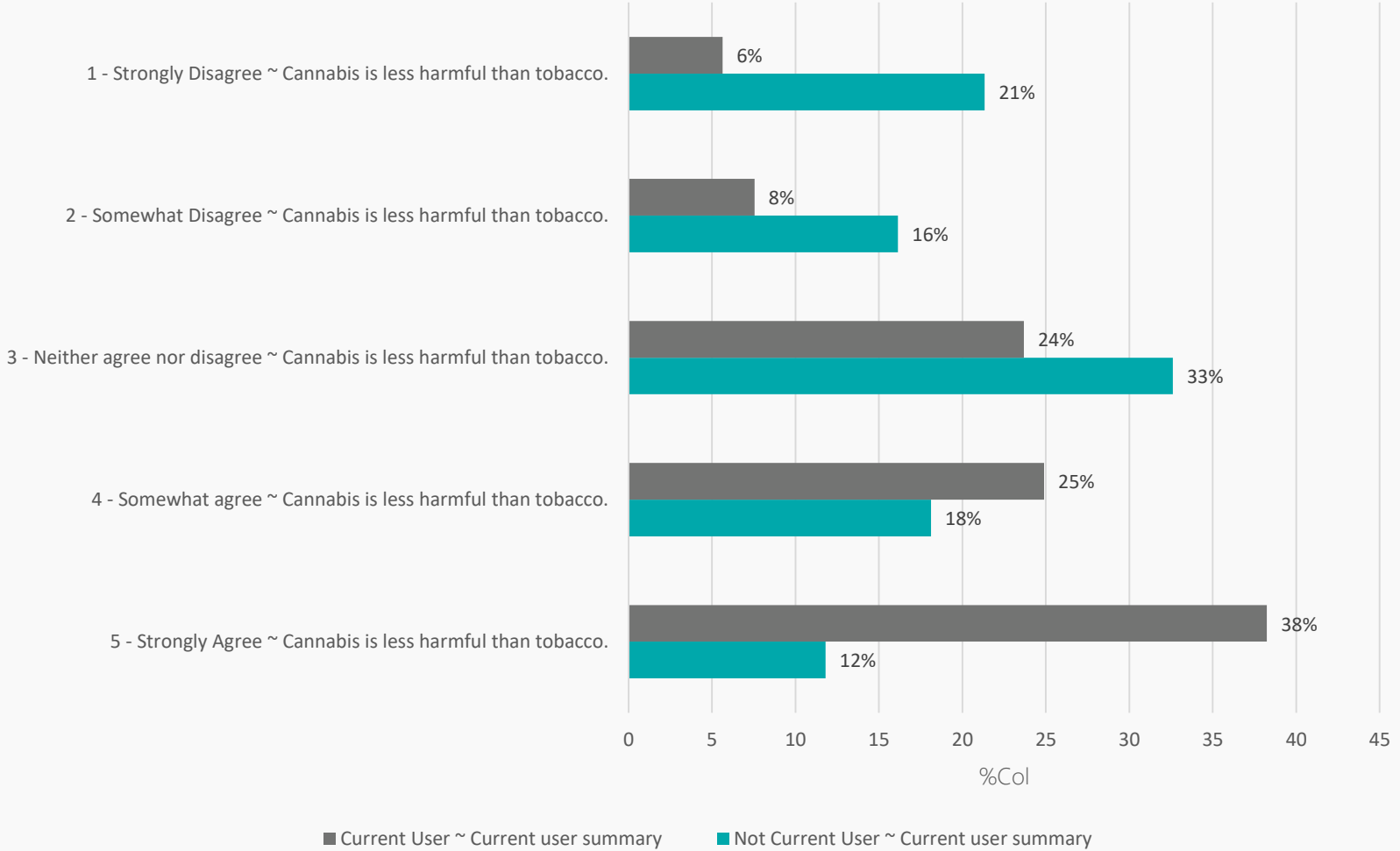
Cannabis is gateway drug that leads users to other more harmful drugs.



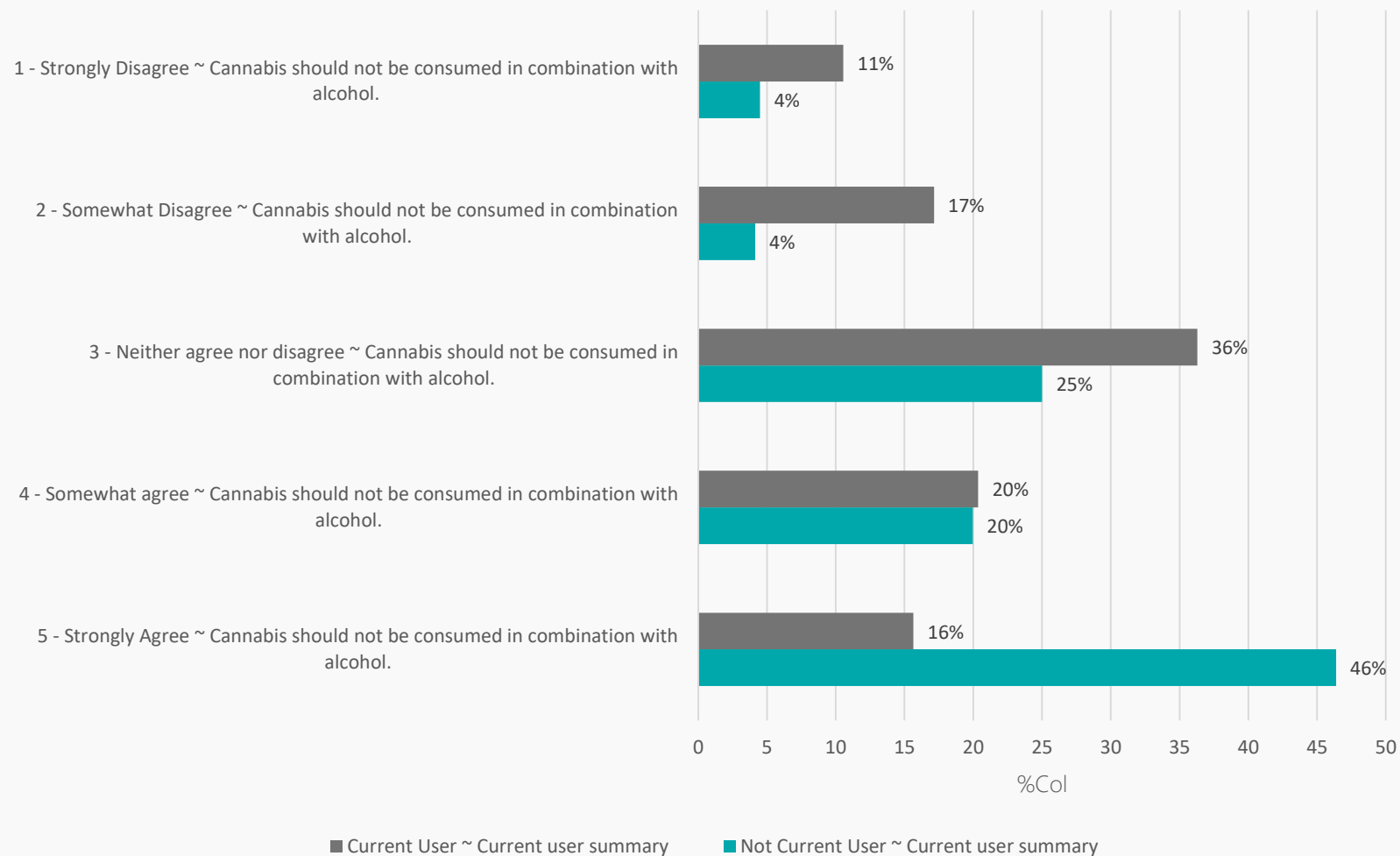
Edible cannabis is safer than smoking it.



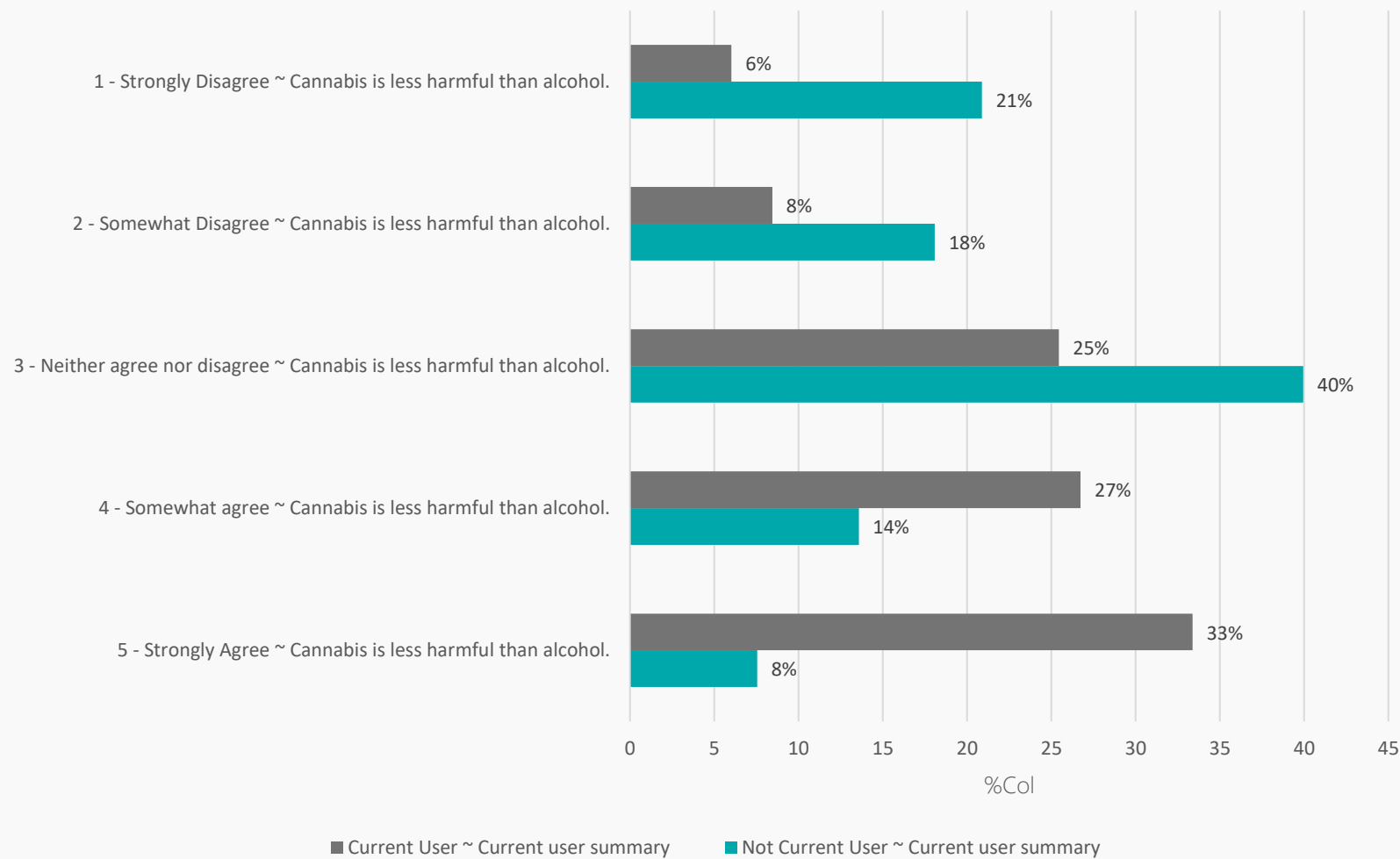
Cannabis is less harmful than tobacco.



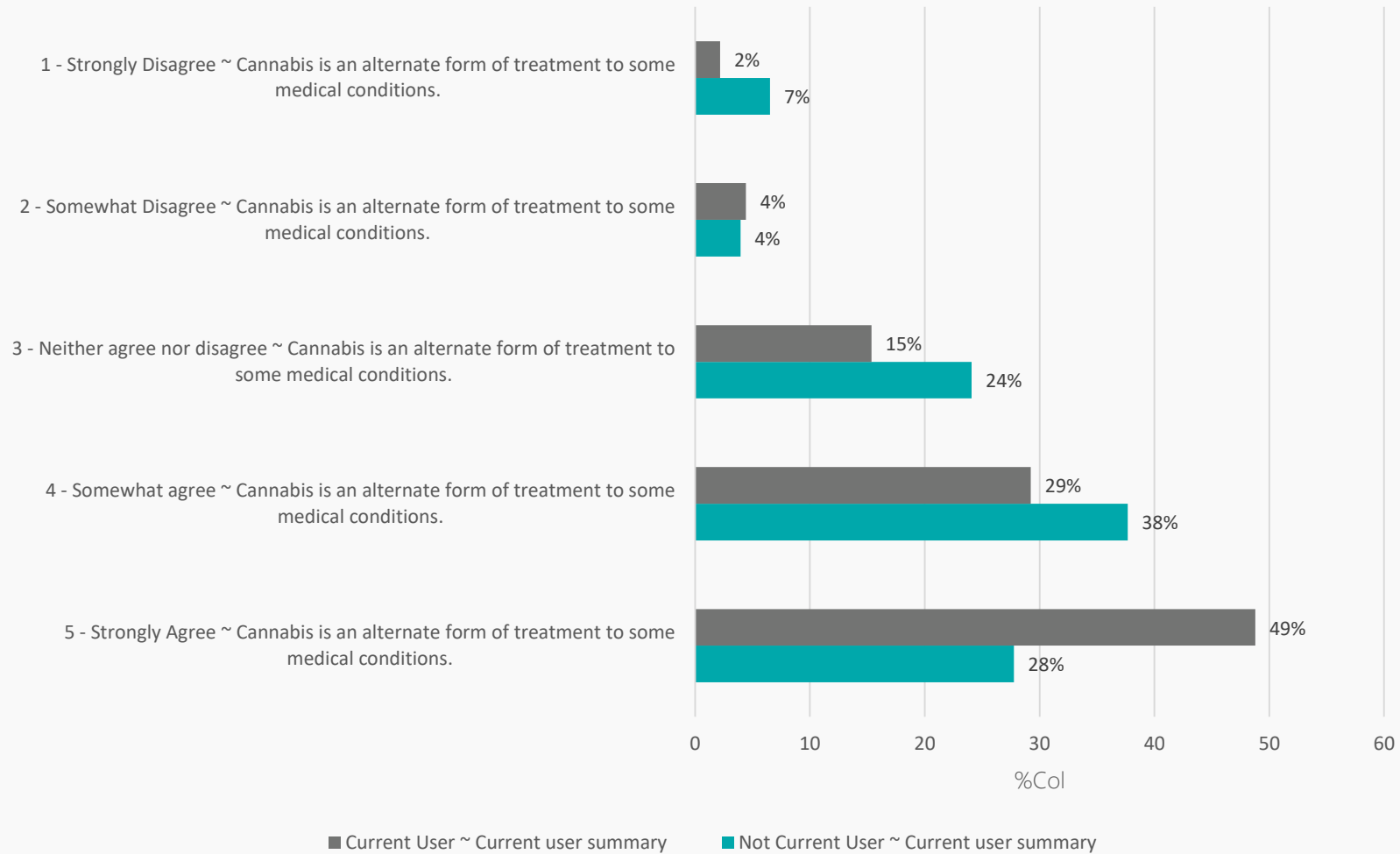
Cannabis should not be consumed in combination with alcohol.



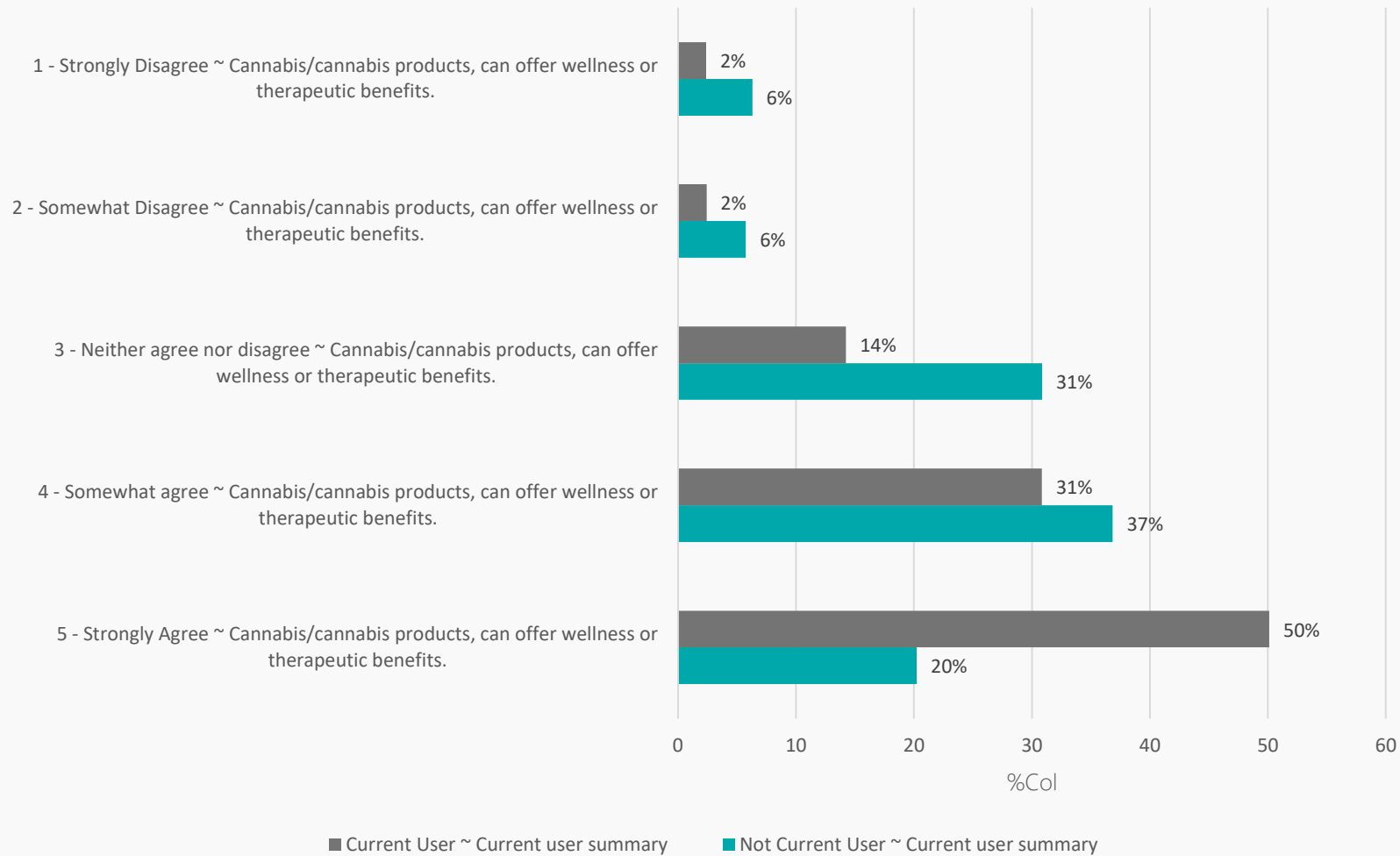
Cannabis is less harmful than alcohol.



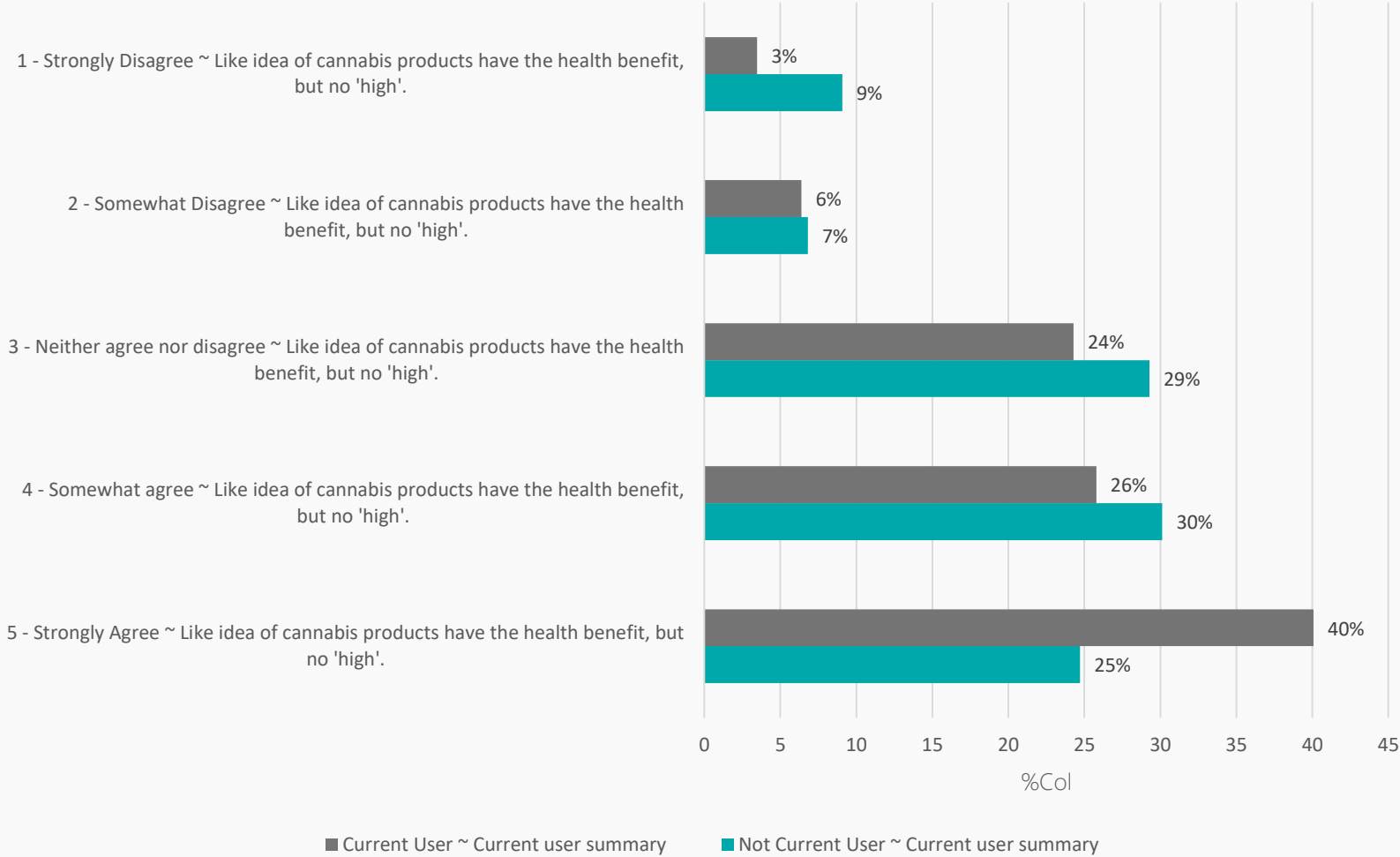
Cannabis is an alternate form of treatment to some medical conditions.



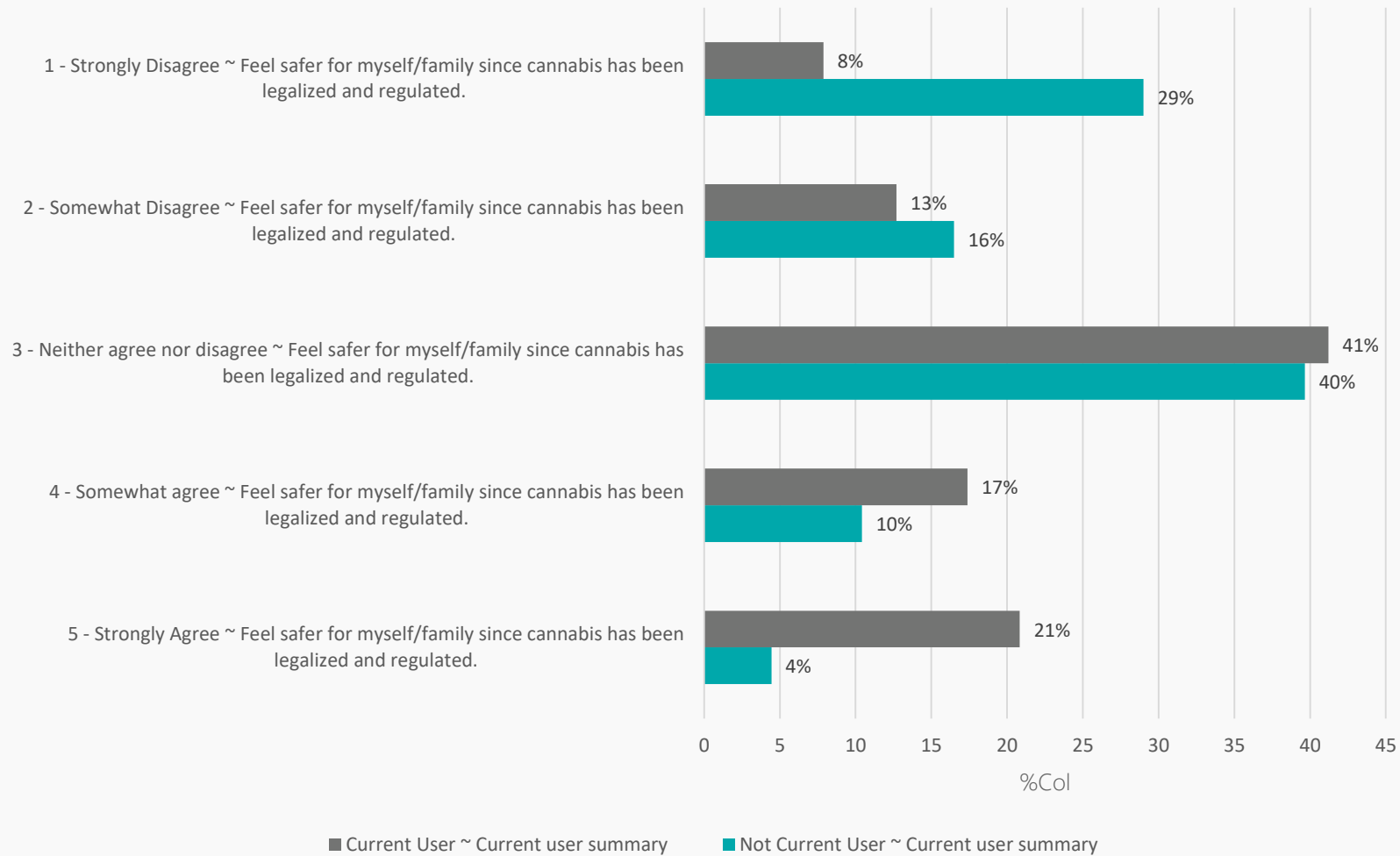
Cannabis/cannabis products, can offer wellness or therapeutic benefits.



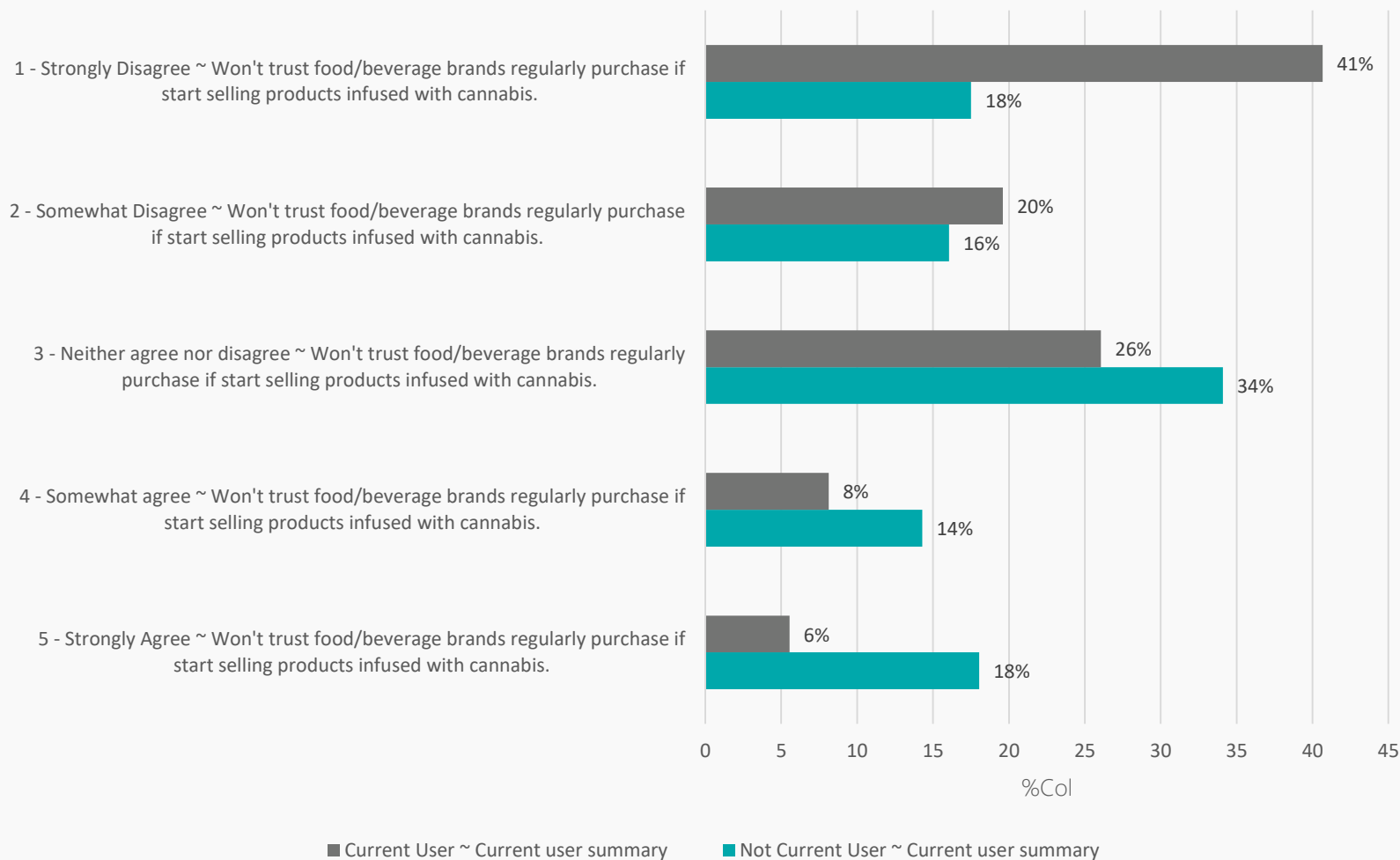
Like idea of cannabis products have the health benefit, but no 'high'.



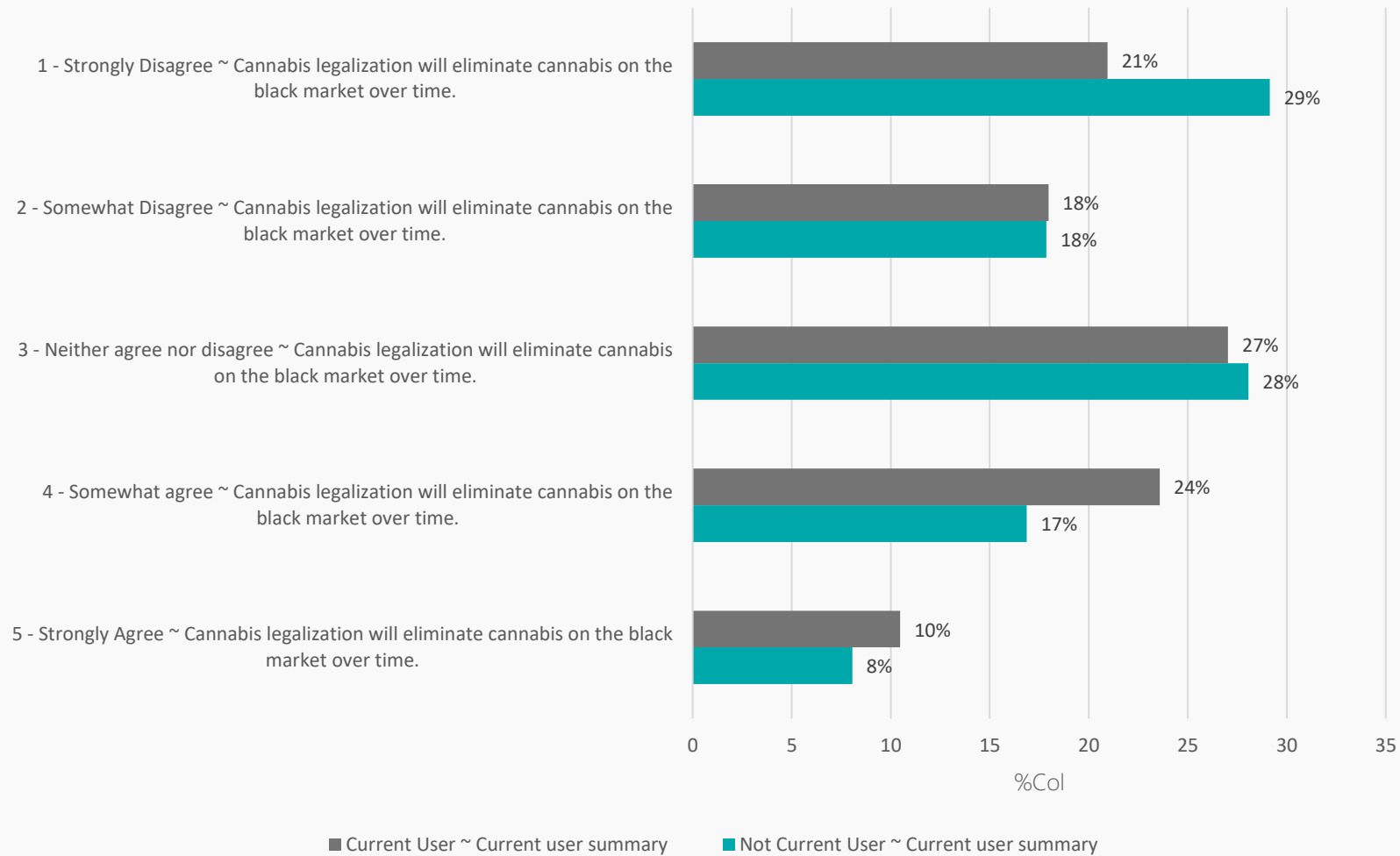
Feel safer for myself/family since cannabis has been legalized and regulated.



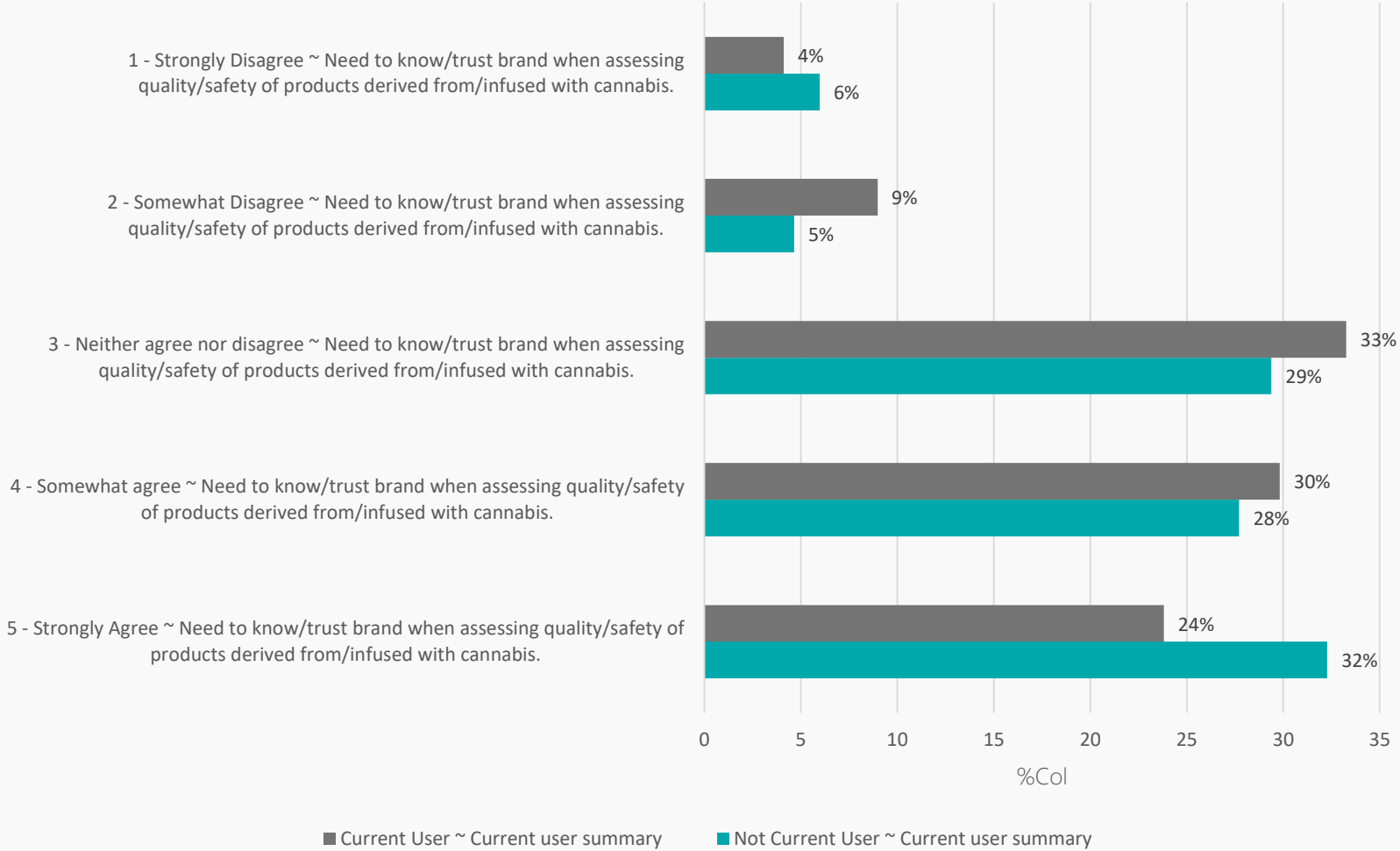
Won't trust food/beverage brands regularly purchase if start selling products infused with cannabis.



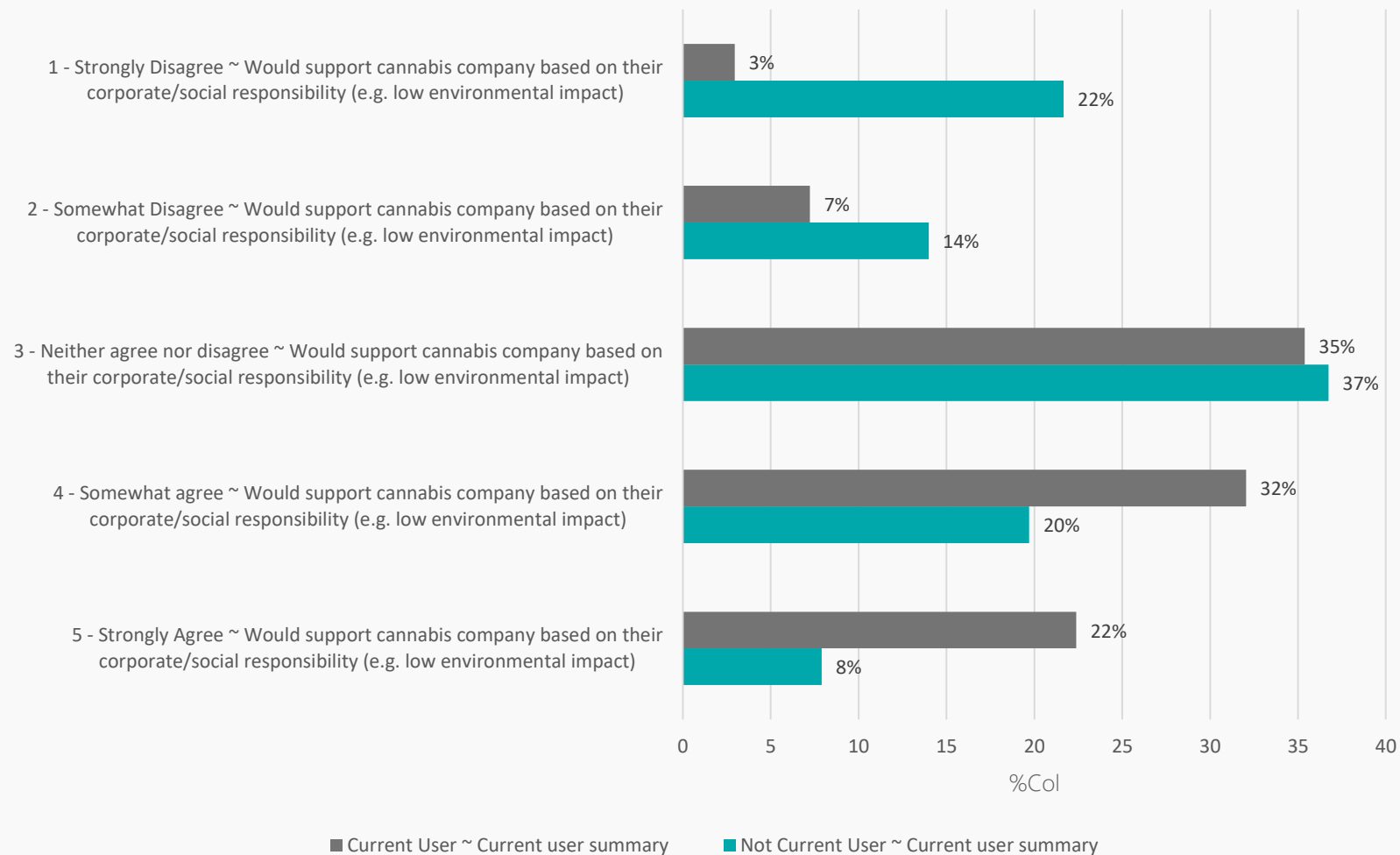
Cannabis legalization will eliminate cannabis on the black market over time.



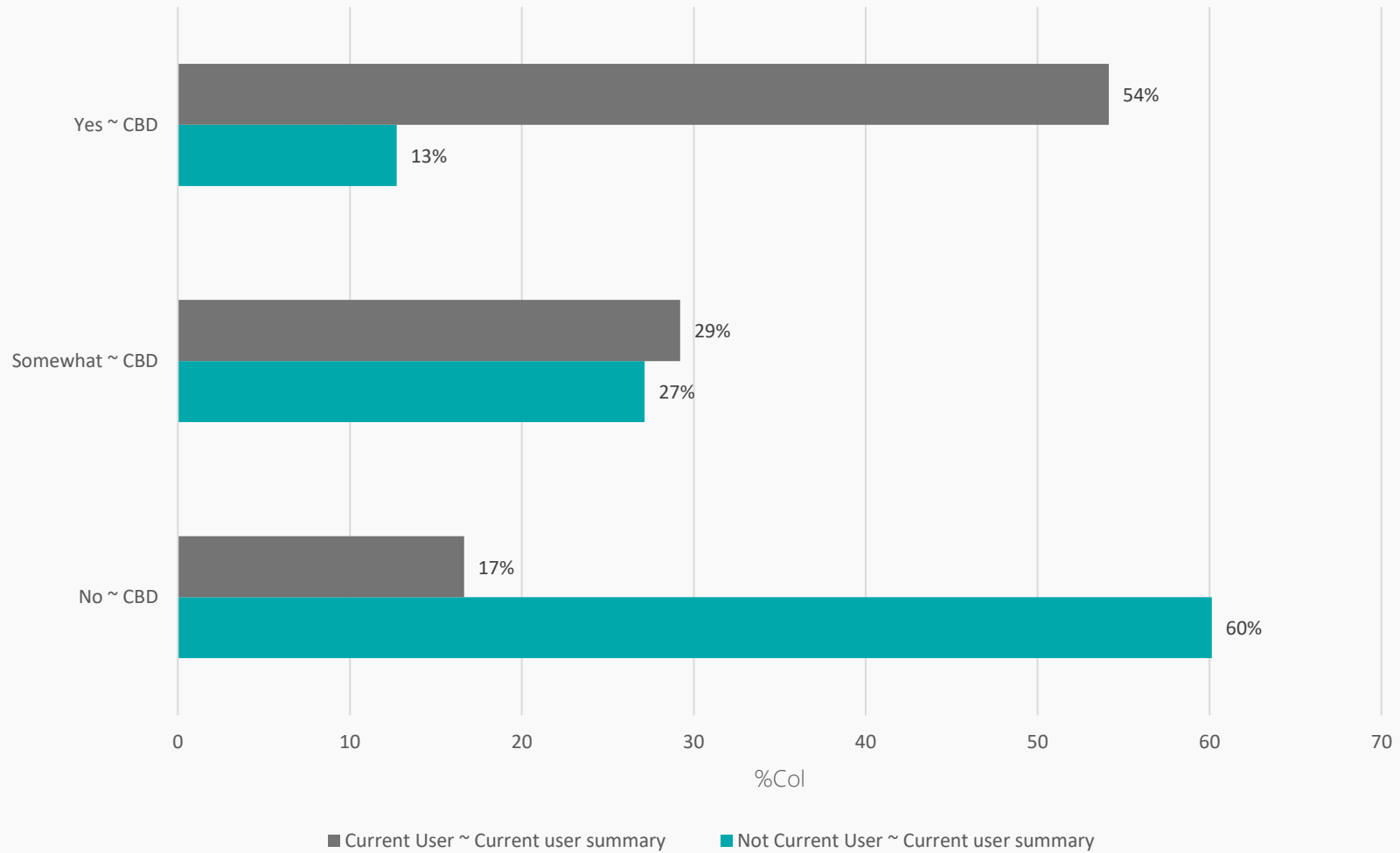
Need to know/trust brand when assessing quality/safety of products derived from/infused with cannabis.



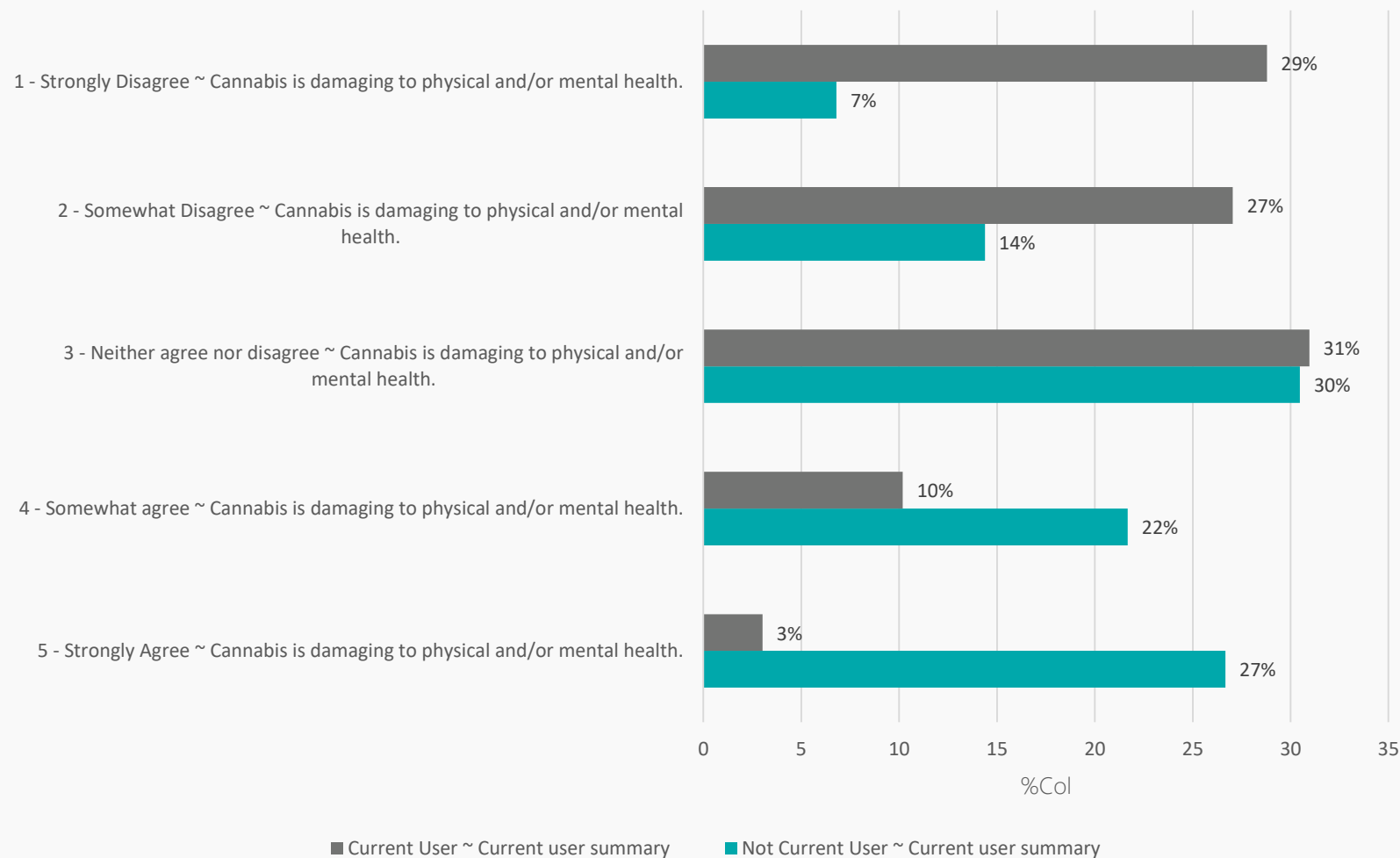
Would support cannabis company based on their corporate/social responsibility (e.g. low environmental impact)



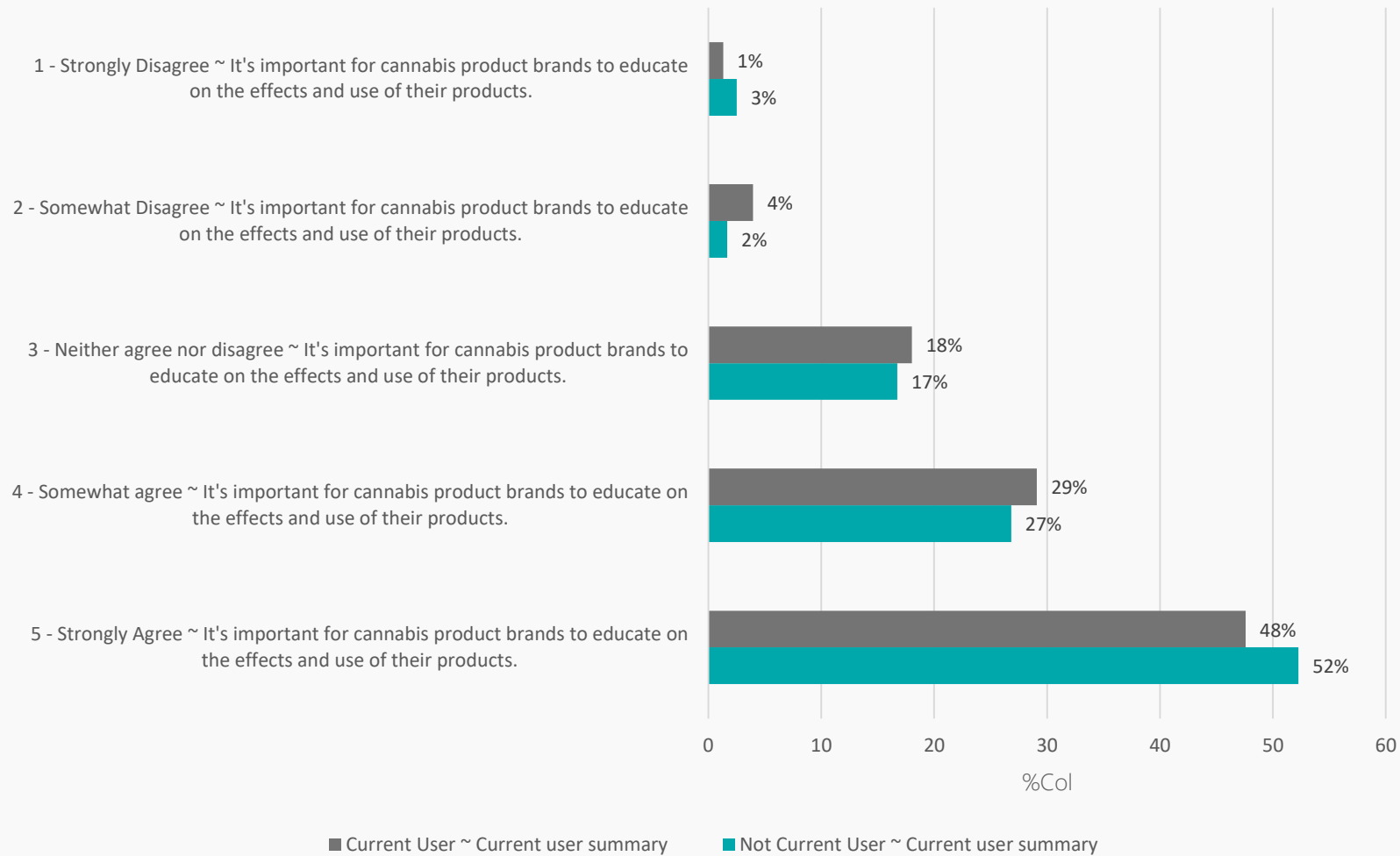
CBD



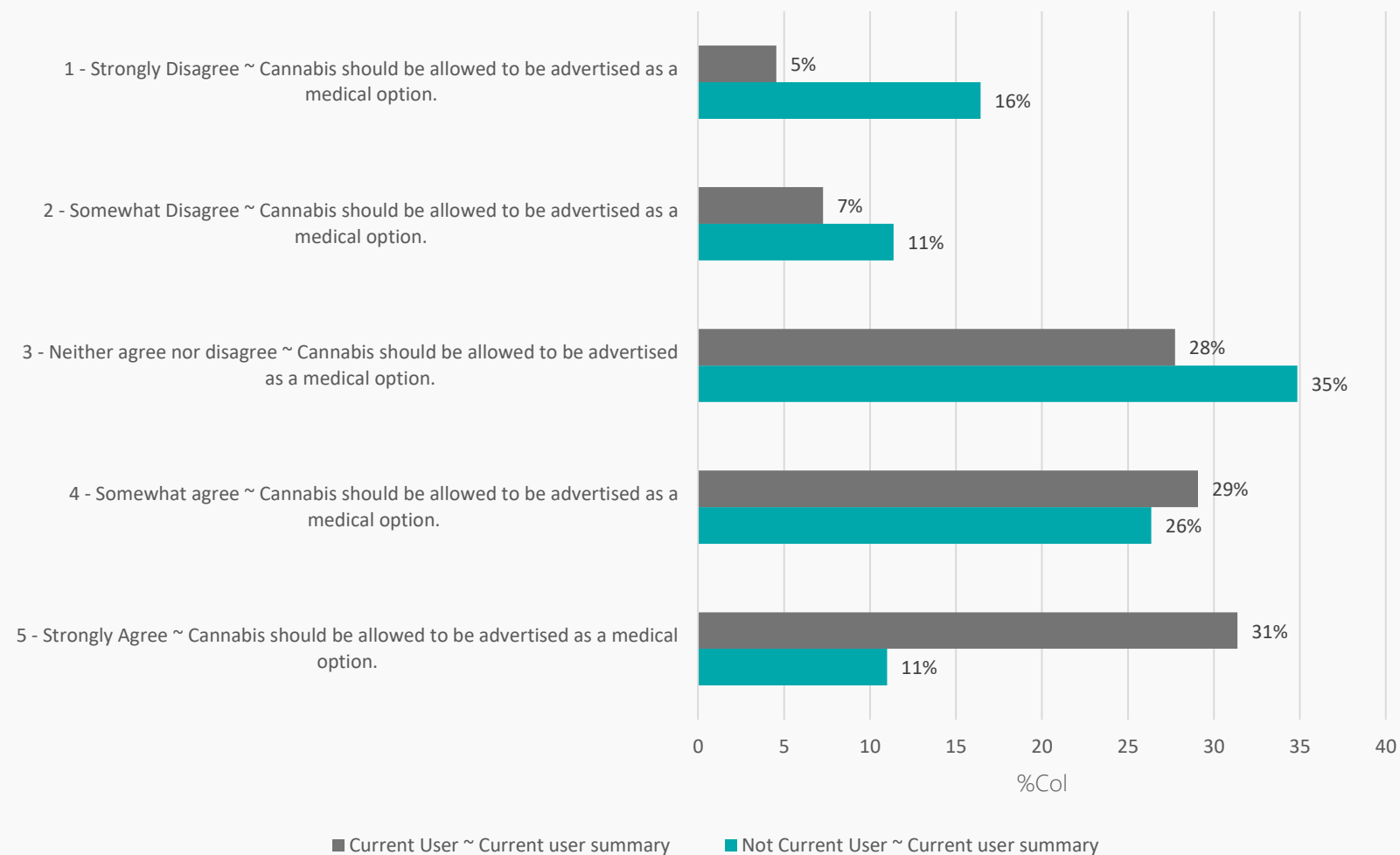
Cannabis is damaging to physical and/or mental health.



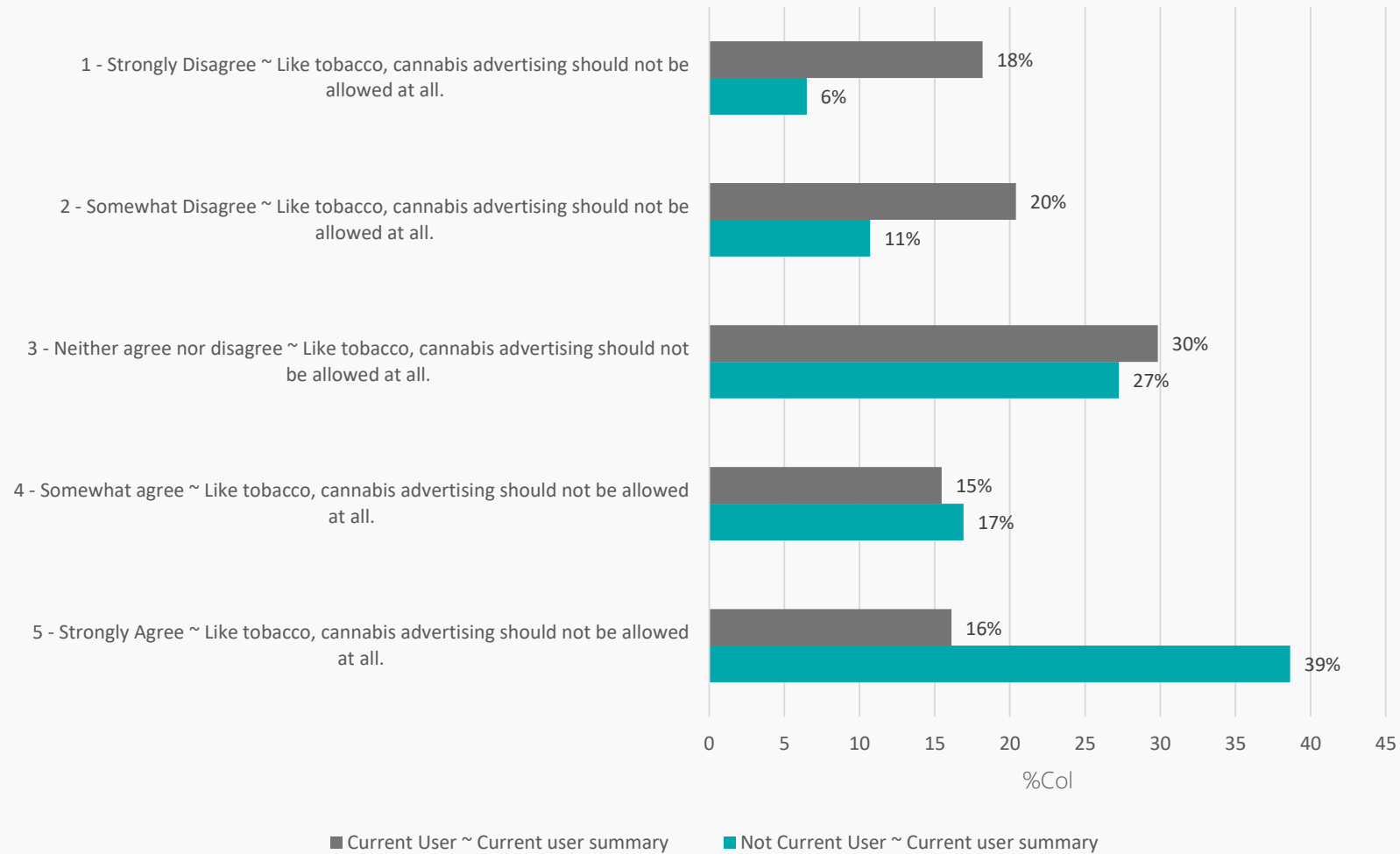
It's important for cannabis product brands to educate on the effects and use of their products.



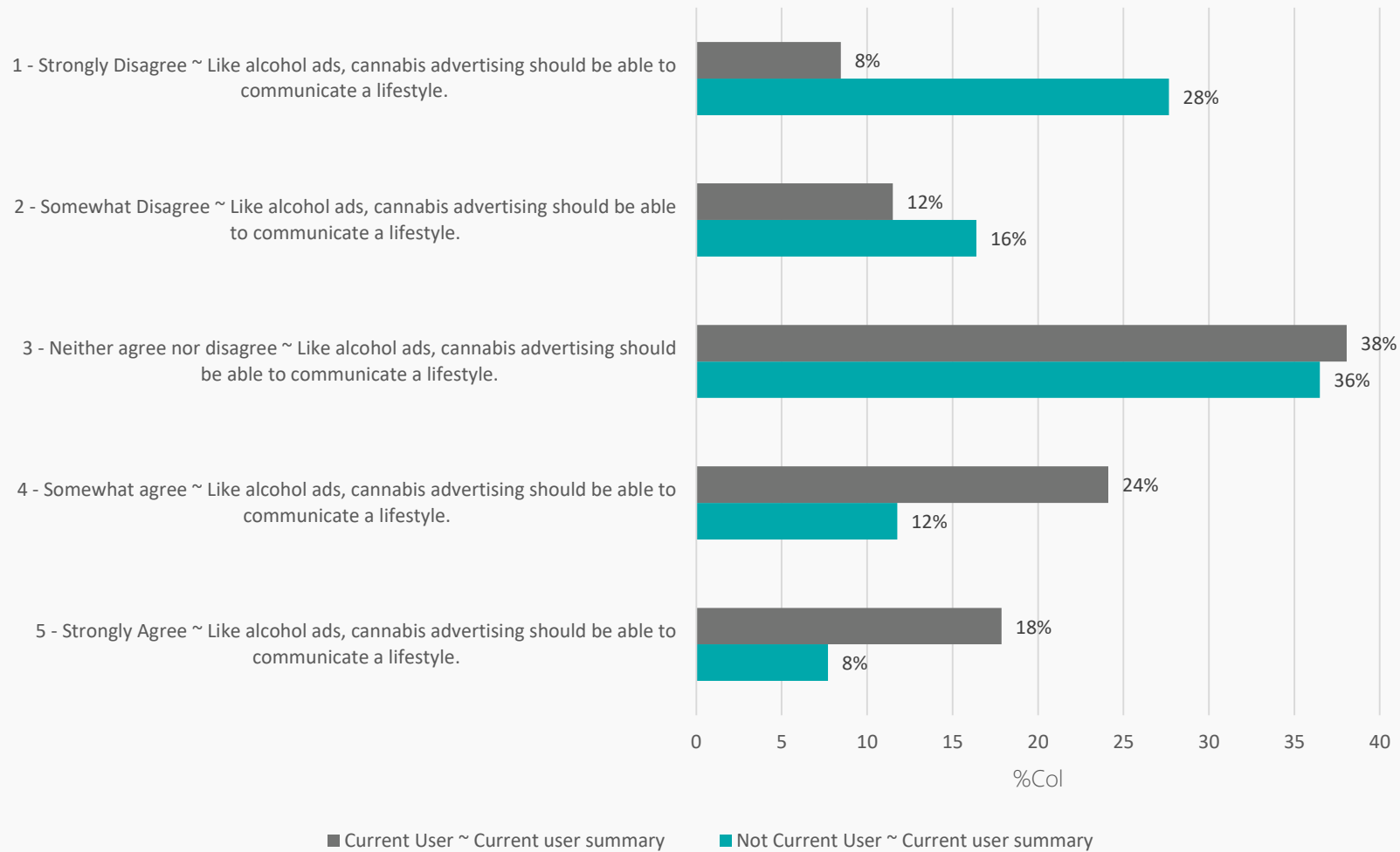
Cannabis should be allowed to be advertised as a medical option.



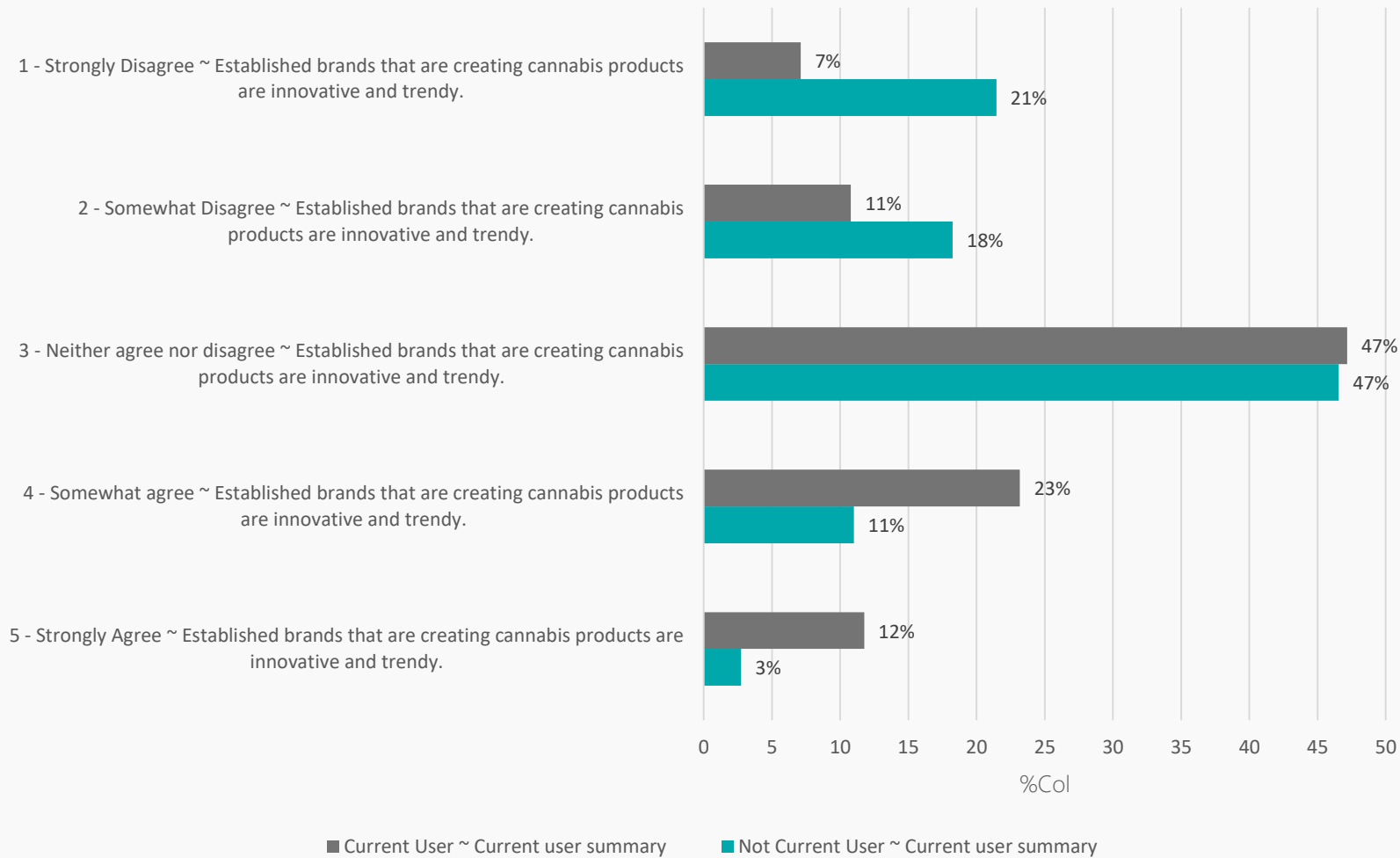
Like tobacco, cannabis advertising should not be allowed at all.



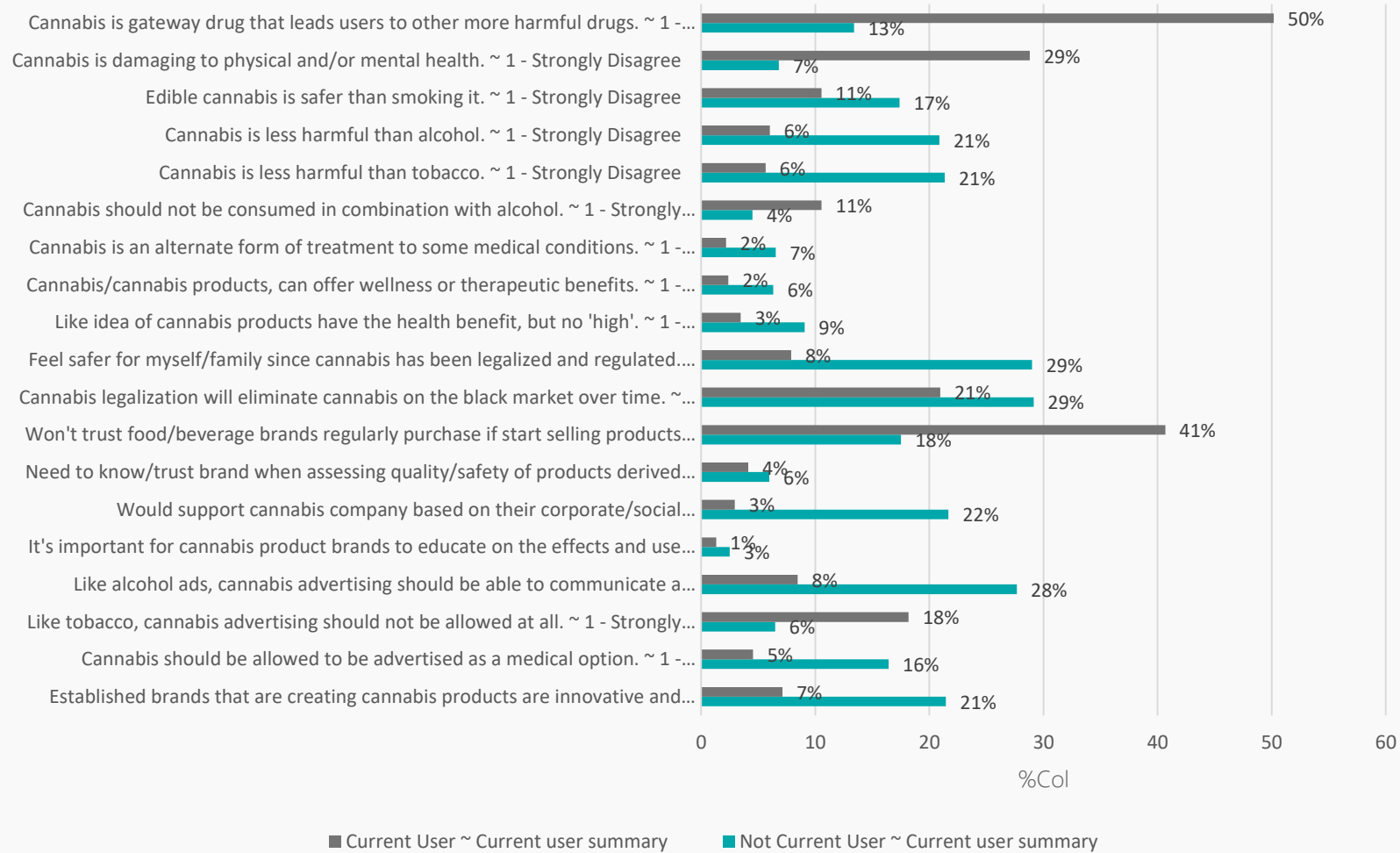
Like alcohol ads, cannabis advertising should be able to communicate a lifestyle.



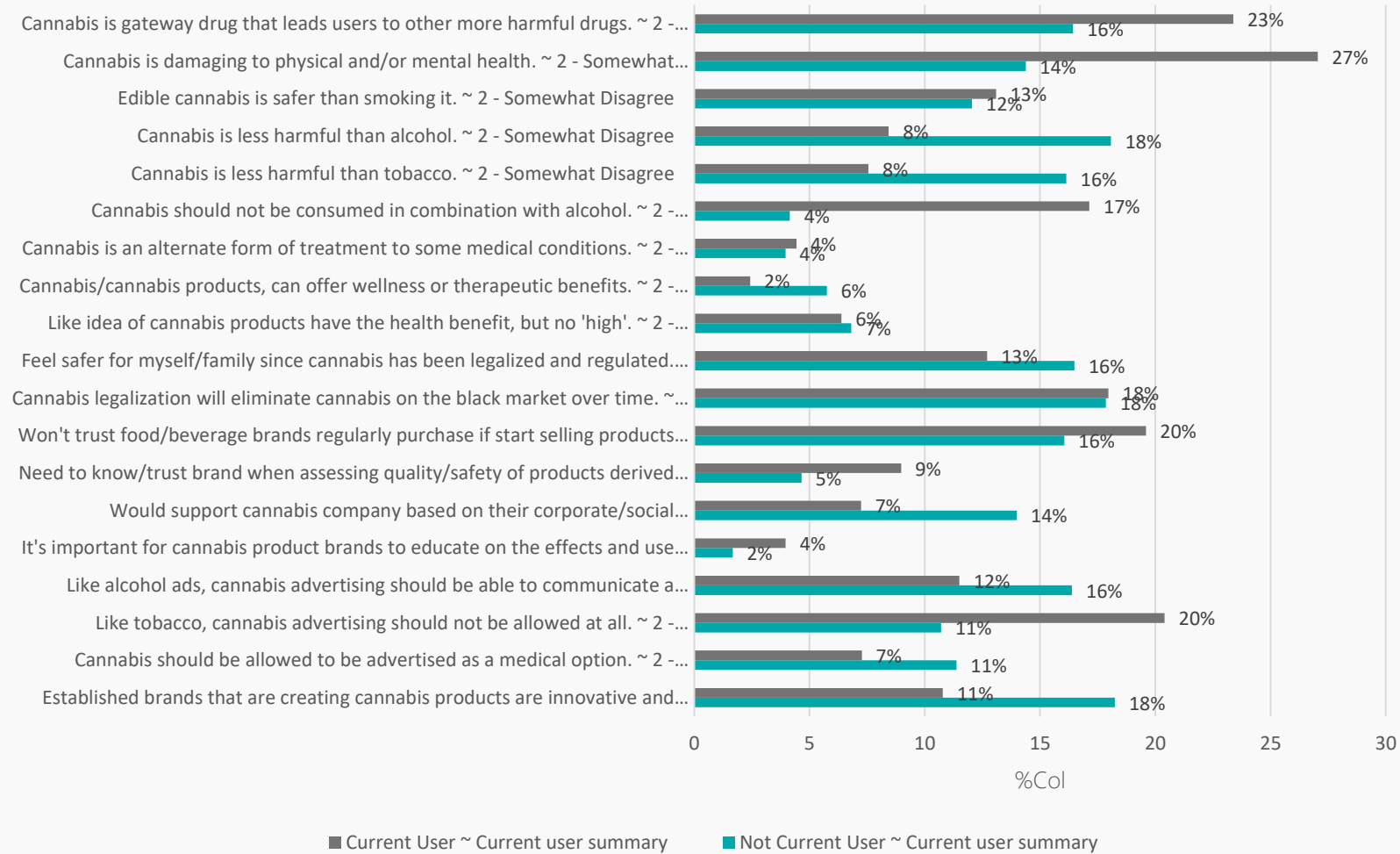
Established brands that are creating cannabis products are innovative and trendy.



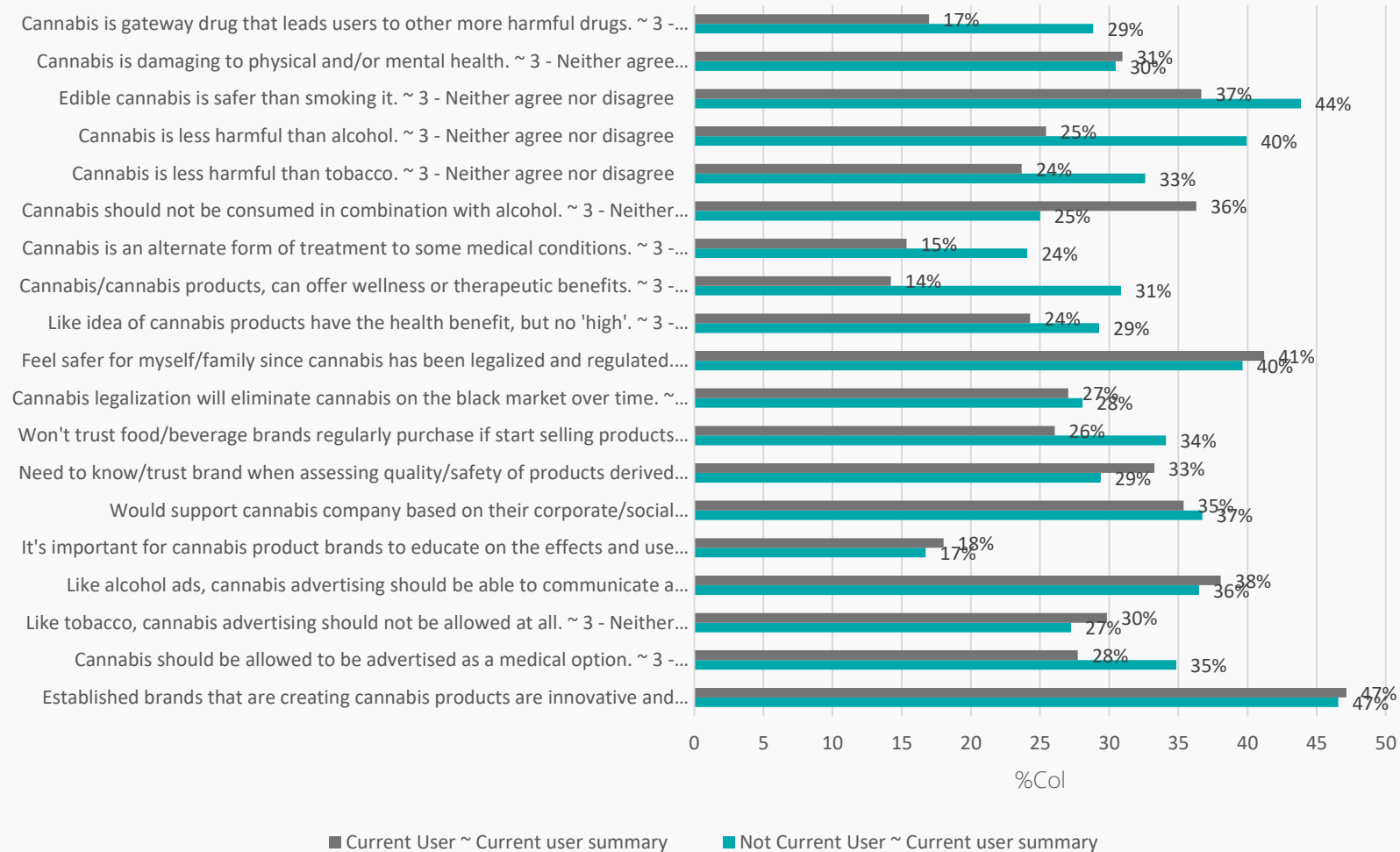
1 - Strongly Disagree



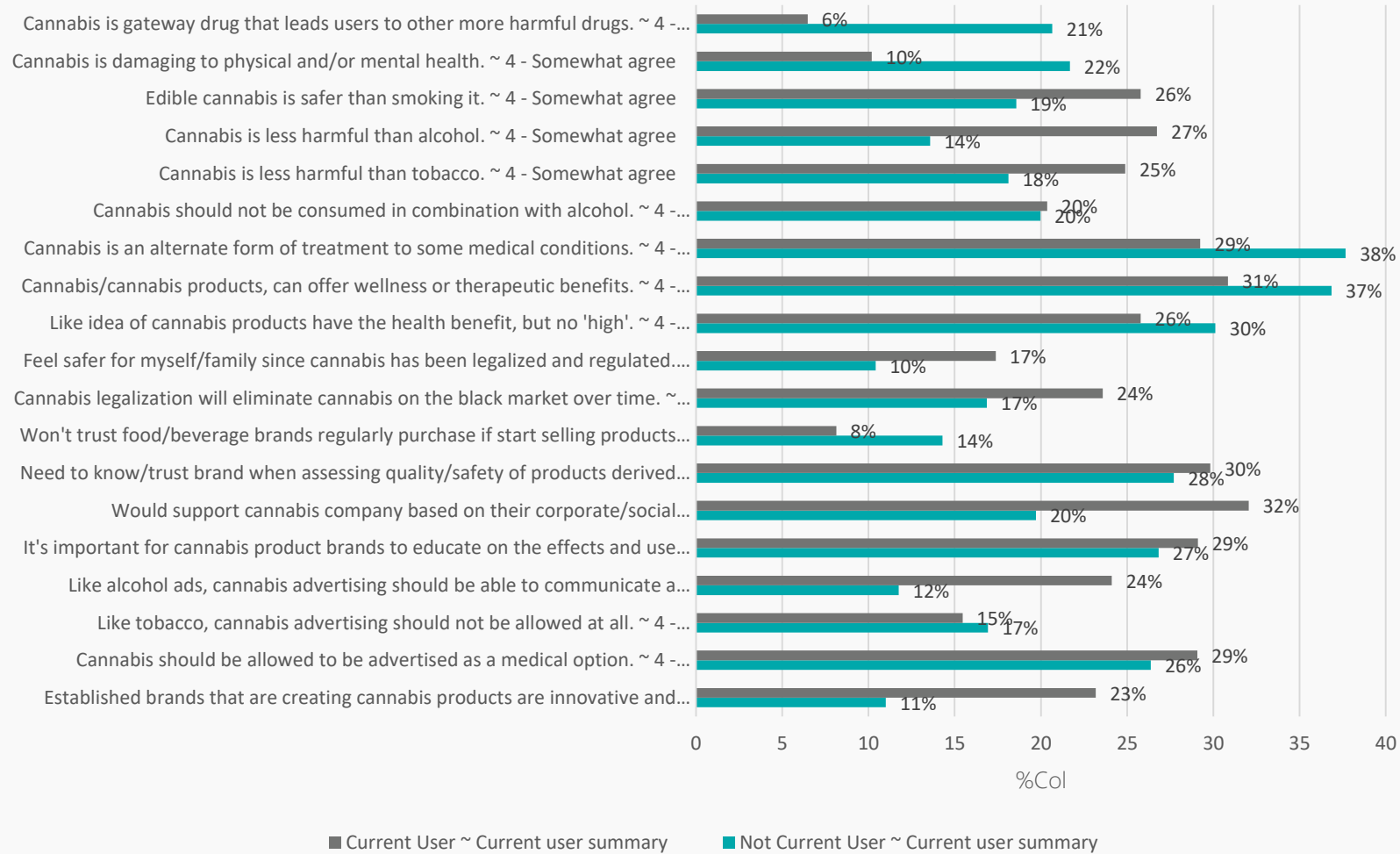
2 - Somewhat Disagree



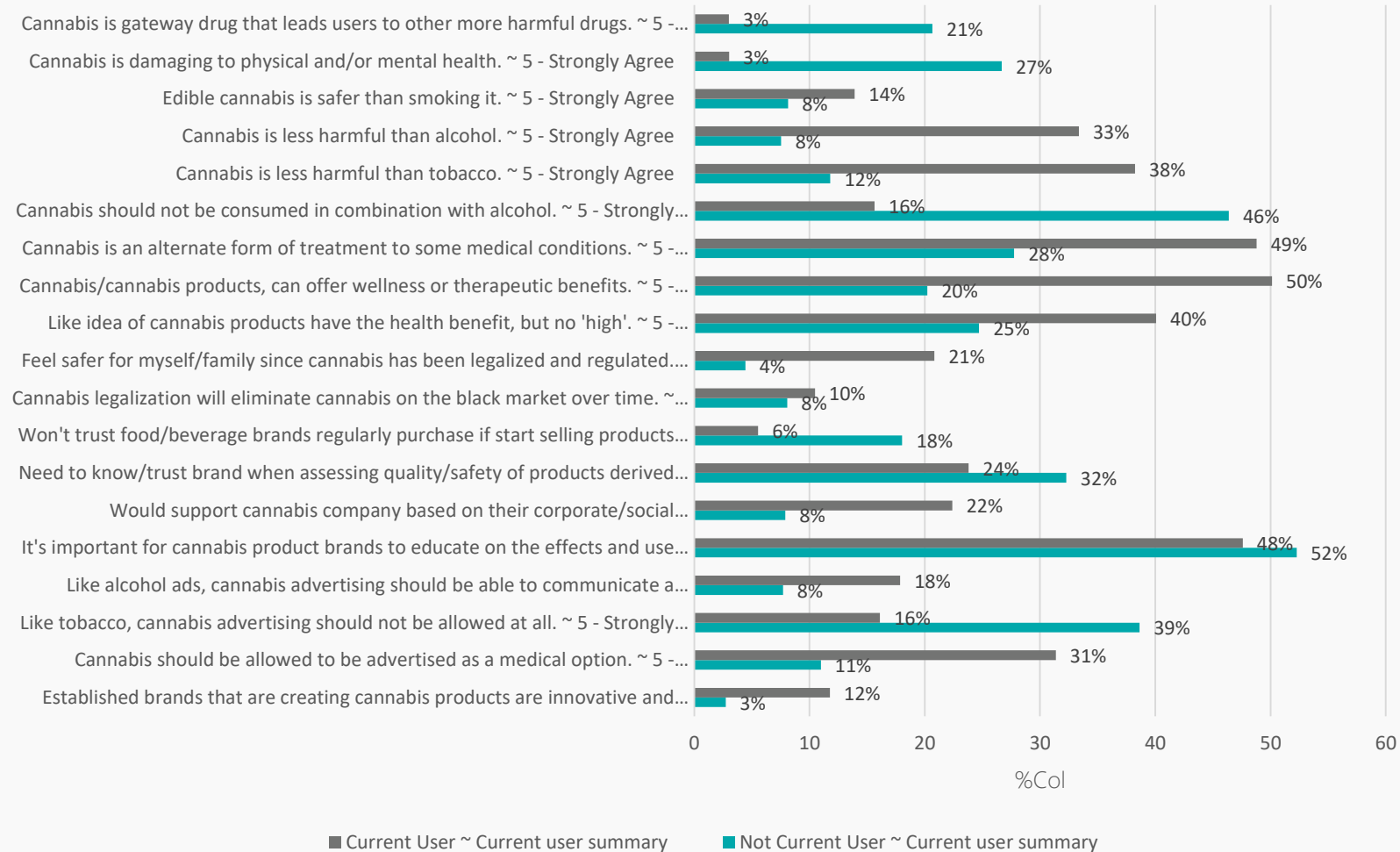
3 - Neither agree nor disagree



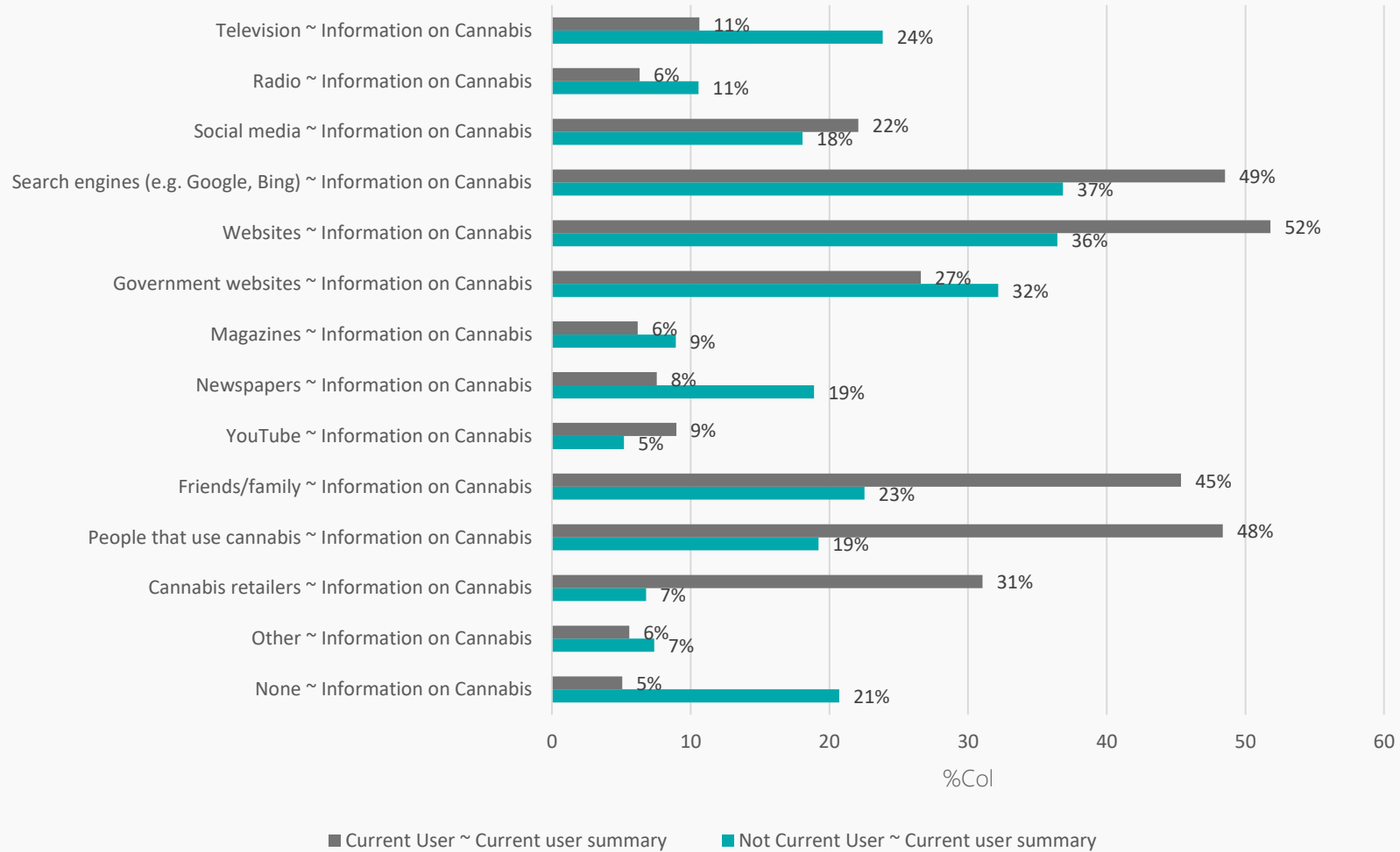
4 - Somewhat agree



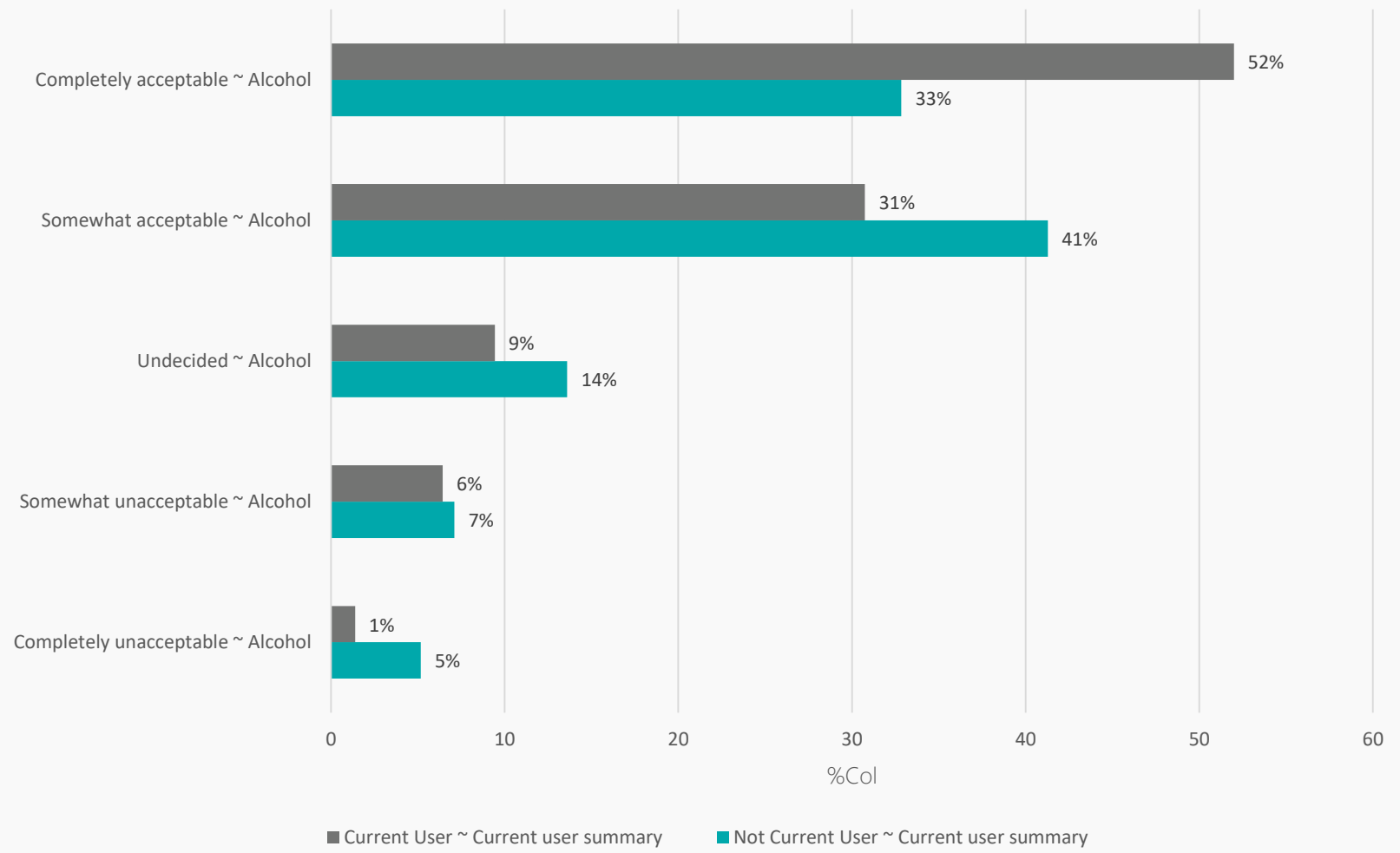
5 - Strongly Agree



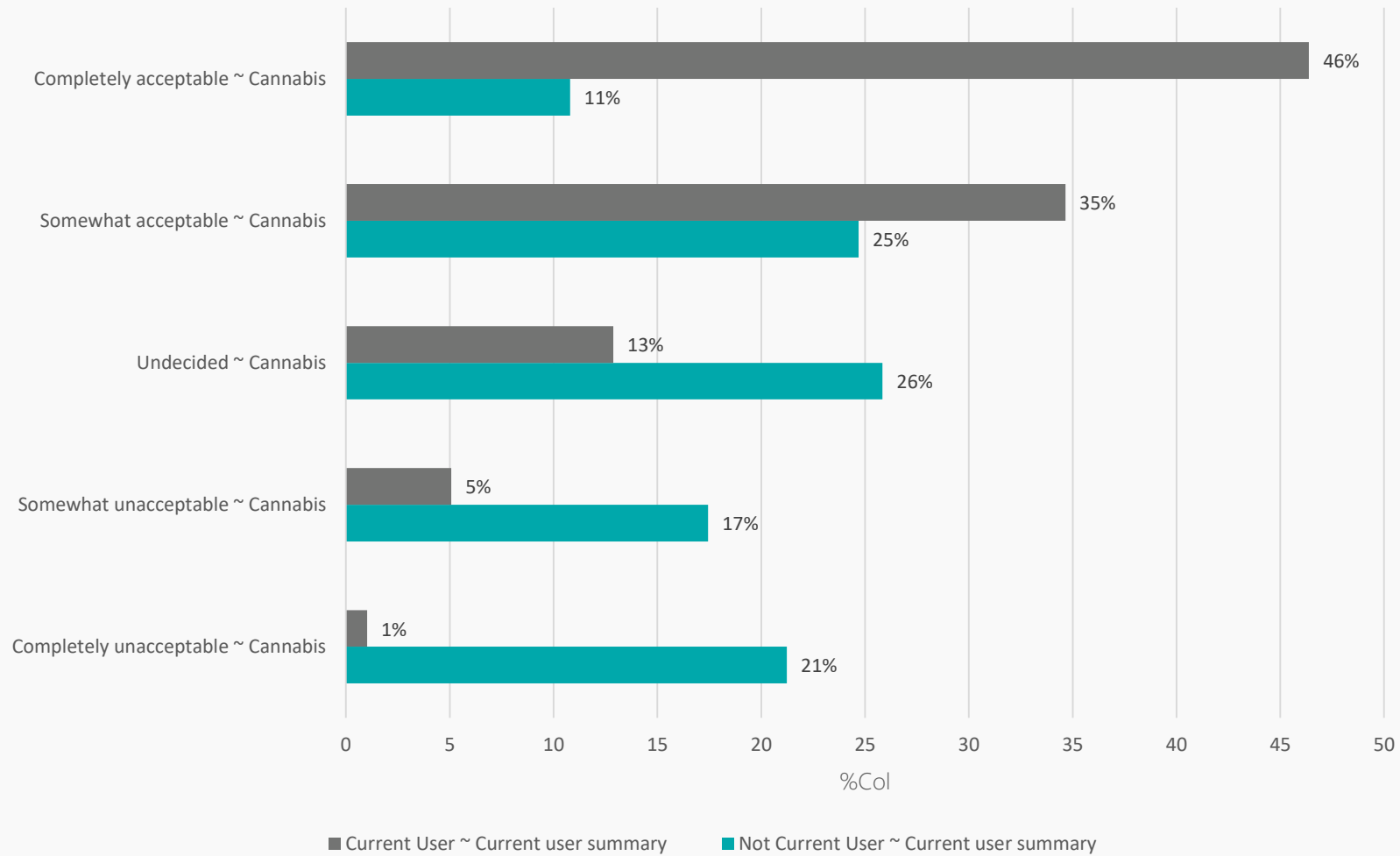
Information on Cannabis



Alcohol



Cannabis



Tobacco

