

Understand the German Recreational Cannabis Market



Current state:

- Germany plans to legalize cannabis in 2024
- "Berlin has proposed the paper to the European Commission for a pre-assessment and will only draft the law once the Commission sanctions the plan."
- EuroNews 27 Jan 23
- Also need to find work-around for the UN Single Convention on Narcotic Drugs

Cody Brasel
March 2023

Analyzing survey data about recreational cannabis in Germany Apr 2022

Tools Used in Analysis

Respondents

1,083

Demographics

- Age & Gender
- Urban Area
- Employment Status
- Occupation

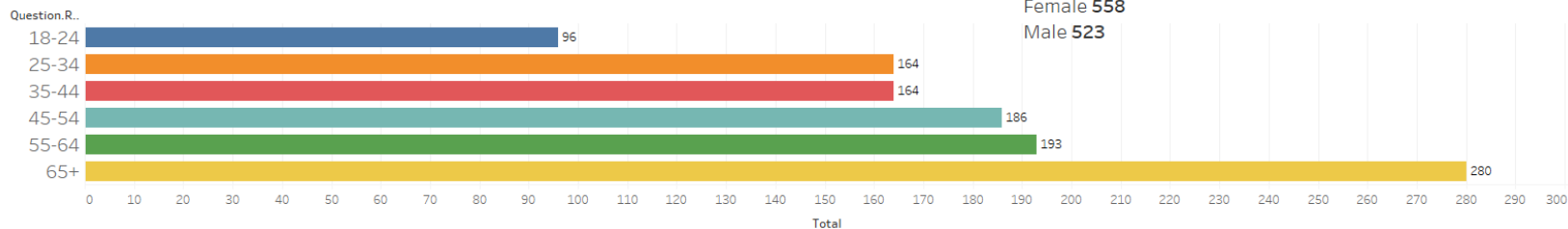
5 Main Survey Questions

1. To what extent do you support or oppose recreational cannabis legalization
2. To what extent do you agree or disagree to 11 aspects:
 - a. Including “would you personally consider trying legal cannabis”
3. Benefits of legalizing cannabis
4. Disadvantages of legalizing cannabis
5. To what extent do you agree or disagree to 10 possible features of a legal cannabis market
 - a. Including “restriction on smoking cannabis in outdoor public spaces”

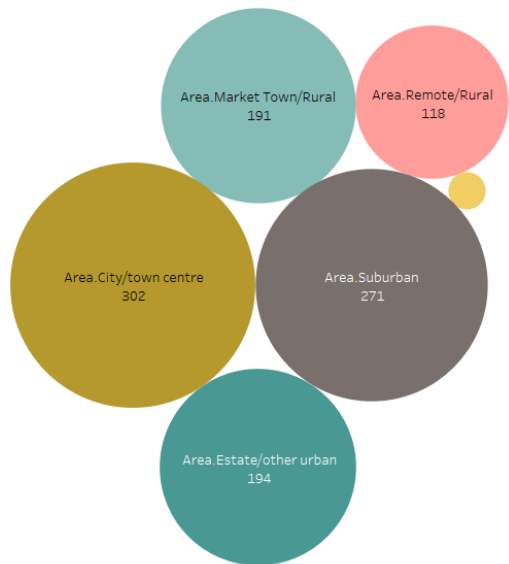


Demographics make us aware of high responses from 65+ age group and Nordrhein & Bayern regions

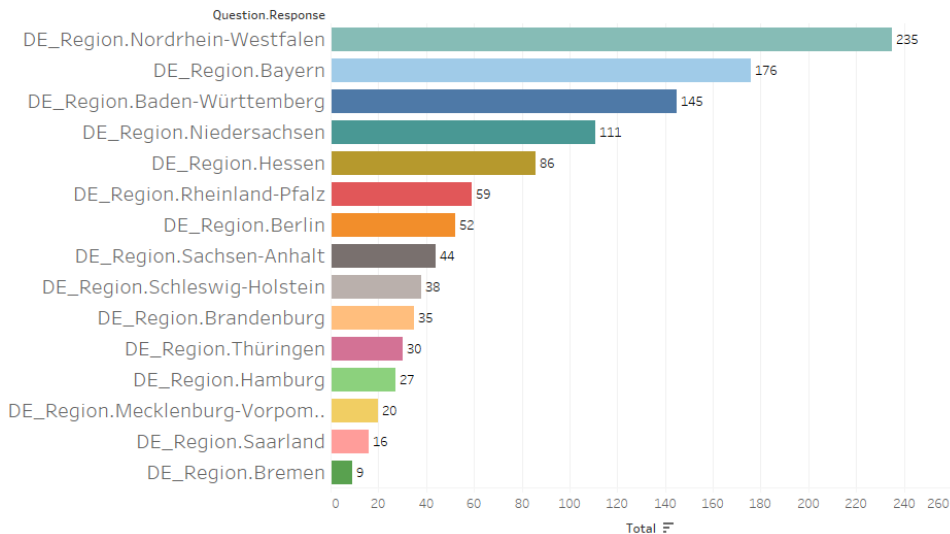
Respondents. Age



Respondents. Area

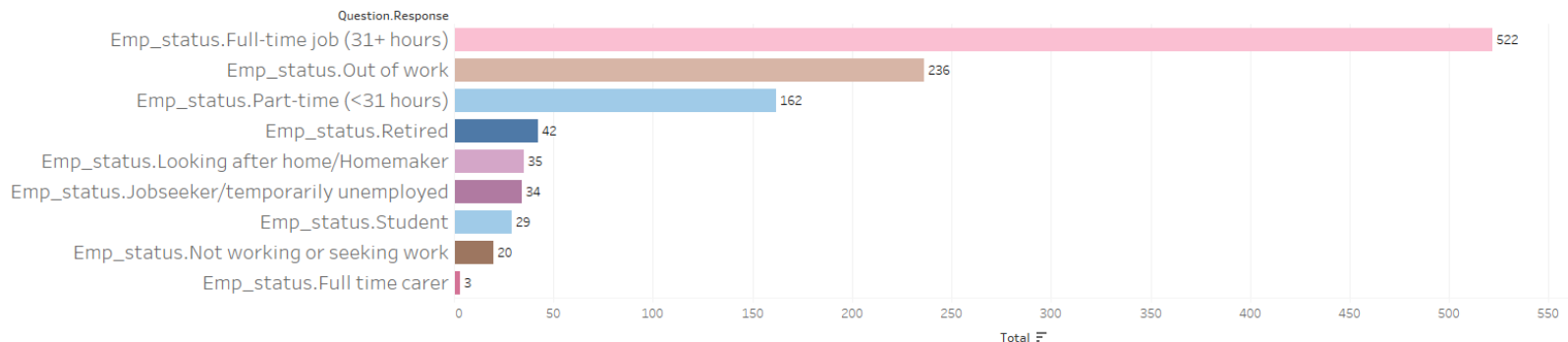


Respondents. Region

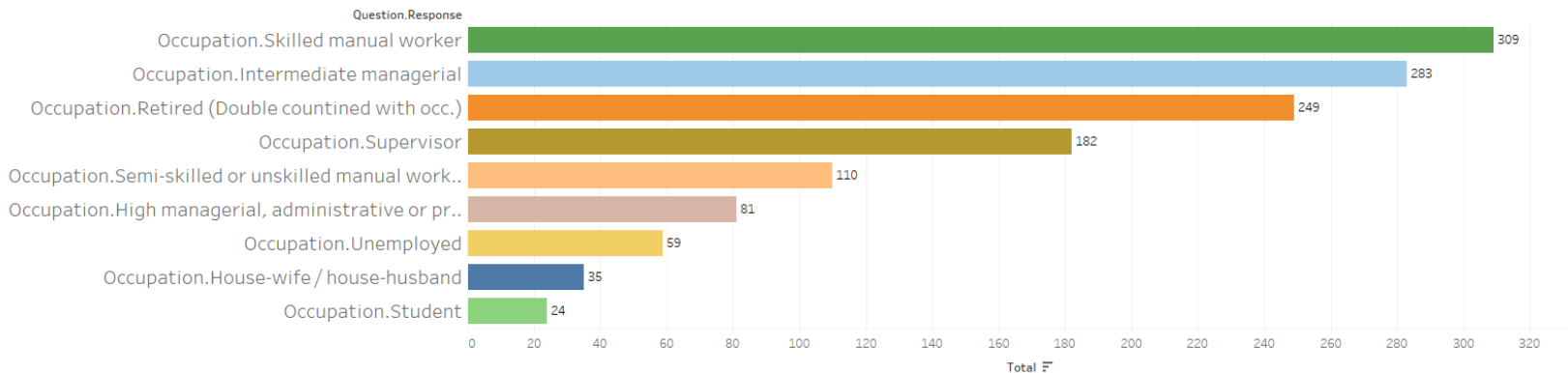


Most respondents were employed with occupations in skilled labor and manager-type roles

Respondents. Emp Status



Respondents. Occupation



Set out to answer three main questions

1

What is the demographic most likely to try legal cannabis?

2

How does Germany feel about recreational cannabis?

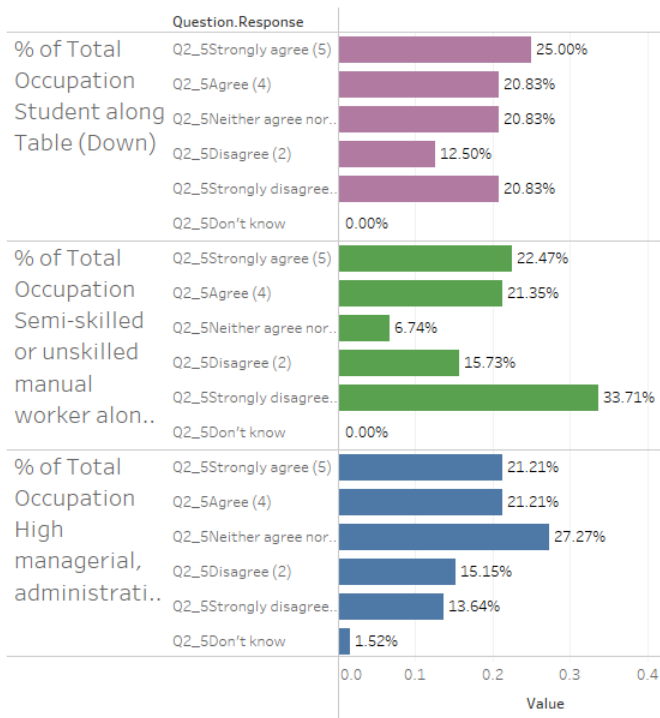
- a. Benefits
- b. Disadvantages

3

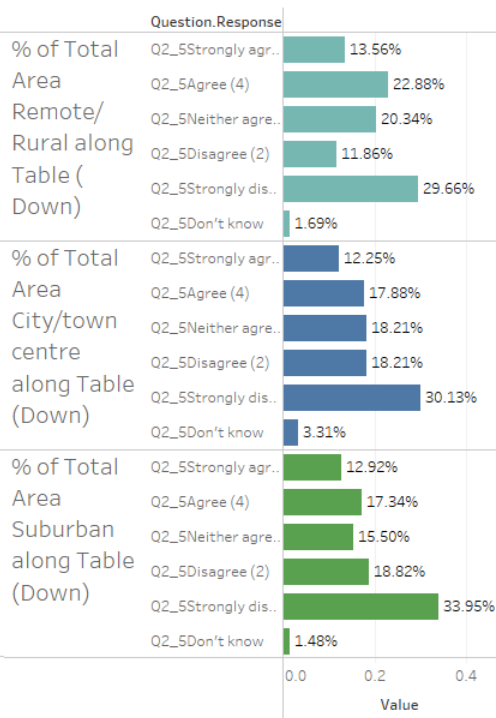
What features does Germany want to see in a legal recreational market?

What is the demographic most likely to try legal cannabis?

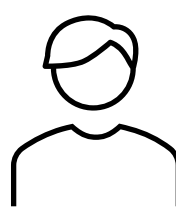
Q2_5Would try.Occupation%



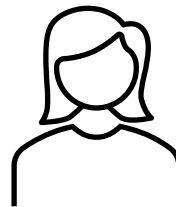
Q2_5Would try.Area%



Customer Persona



Hansel

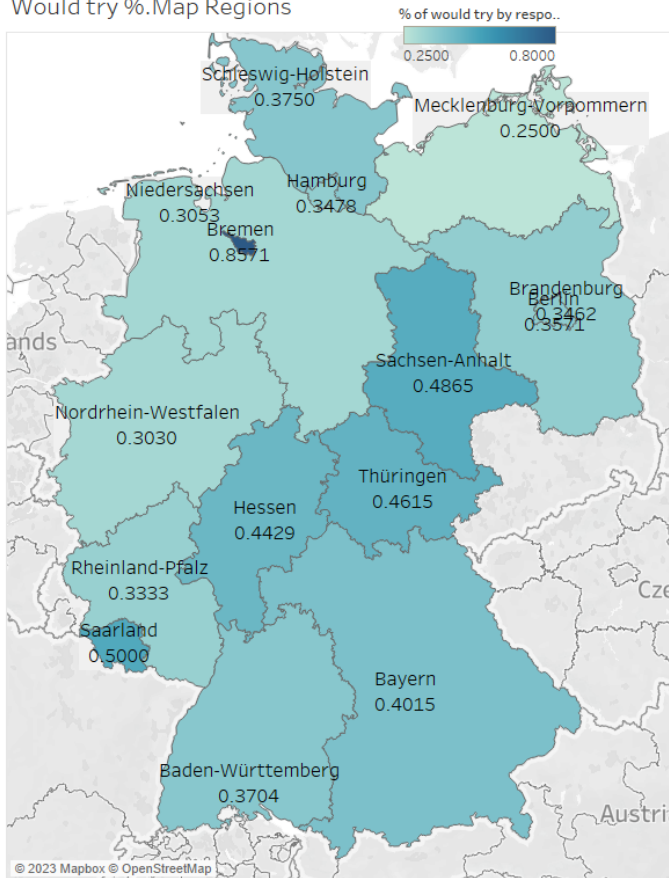


Gretel

Age	18-24	25-34
Gender	Male	Female
Region	Sachsen-Anhalt	Hessen
Area	Remote/Rural	City/town
Occupation	Part-time	Full-time
Employment Stat.	Student	Semi-Skilled

What regions are most likely to try legal cannabis? Less than those that support legalization

Would try %.Map Regions



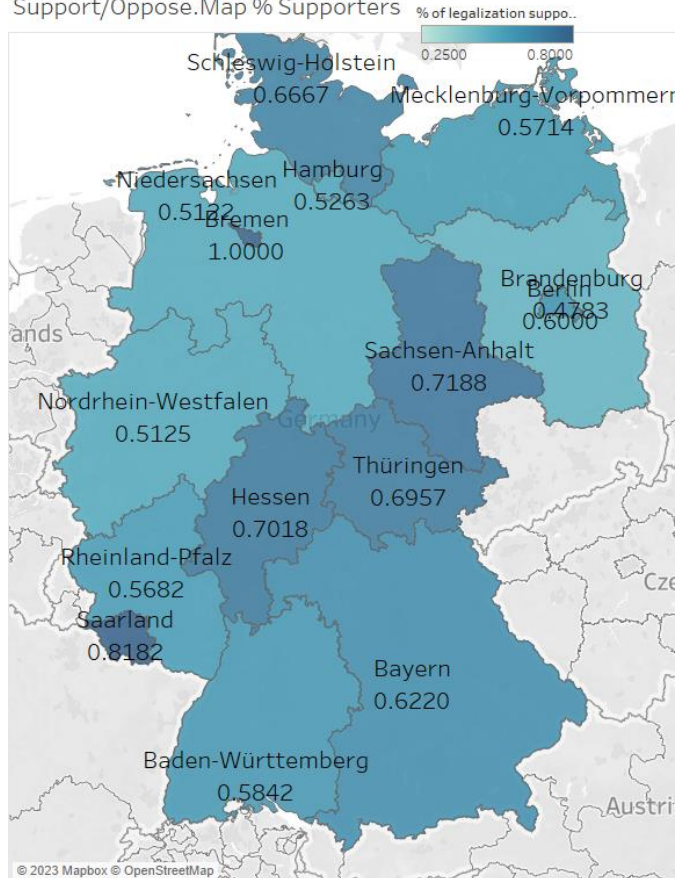
25-49% of Germans agree that they would try legal cannabis

Mostly in Sachsen, Hessen, Thüringen, Bayern

Whereas 47-82% of respondents support the legalization of cannabis

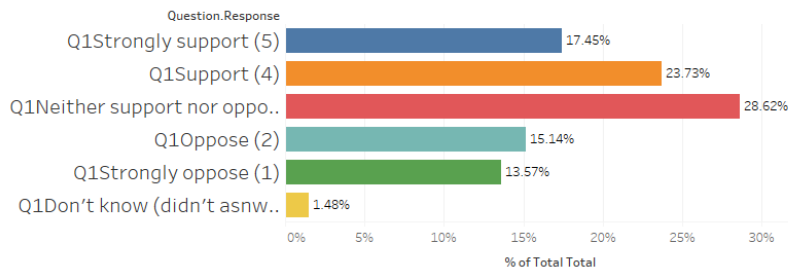
Many Germans support legalization and realize the benefits, but still skeptical about possible risks to try it themselves

Support/Oppose.Map % Supporters

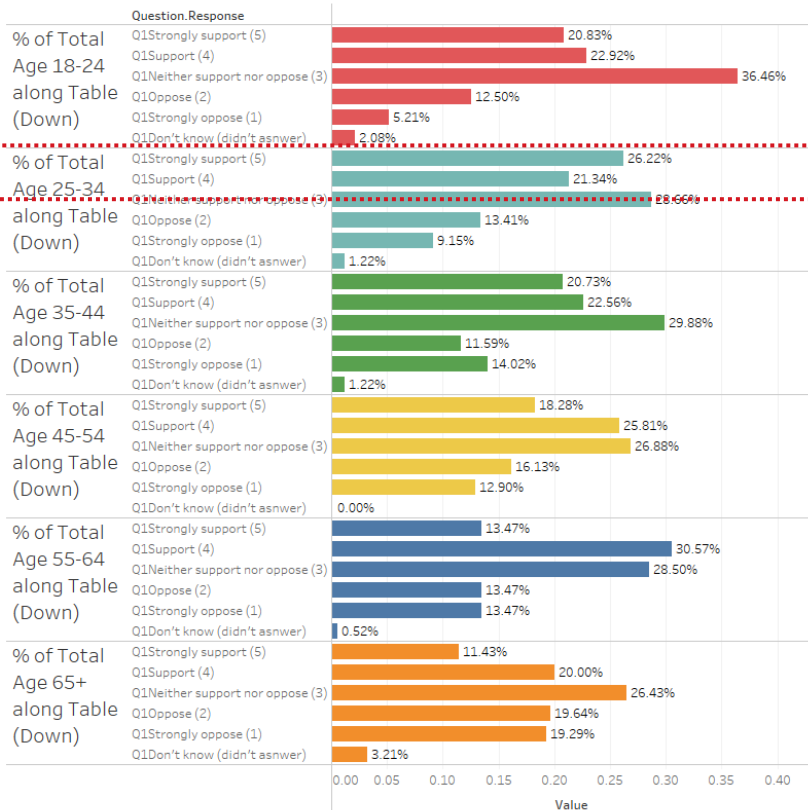


How does Germany feel about the legalization of recreational cannabis? They support it

Q1 Support/Oppose



Q1 Support/Oppose.% Age Group



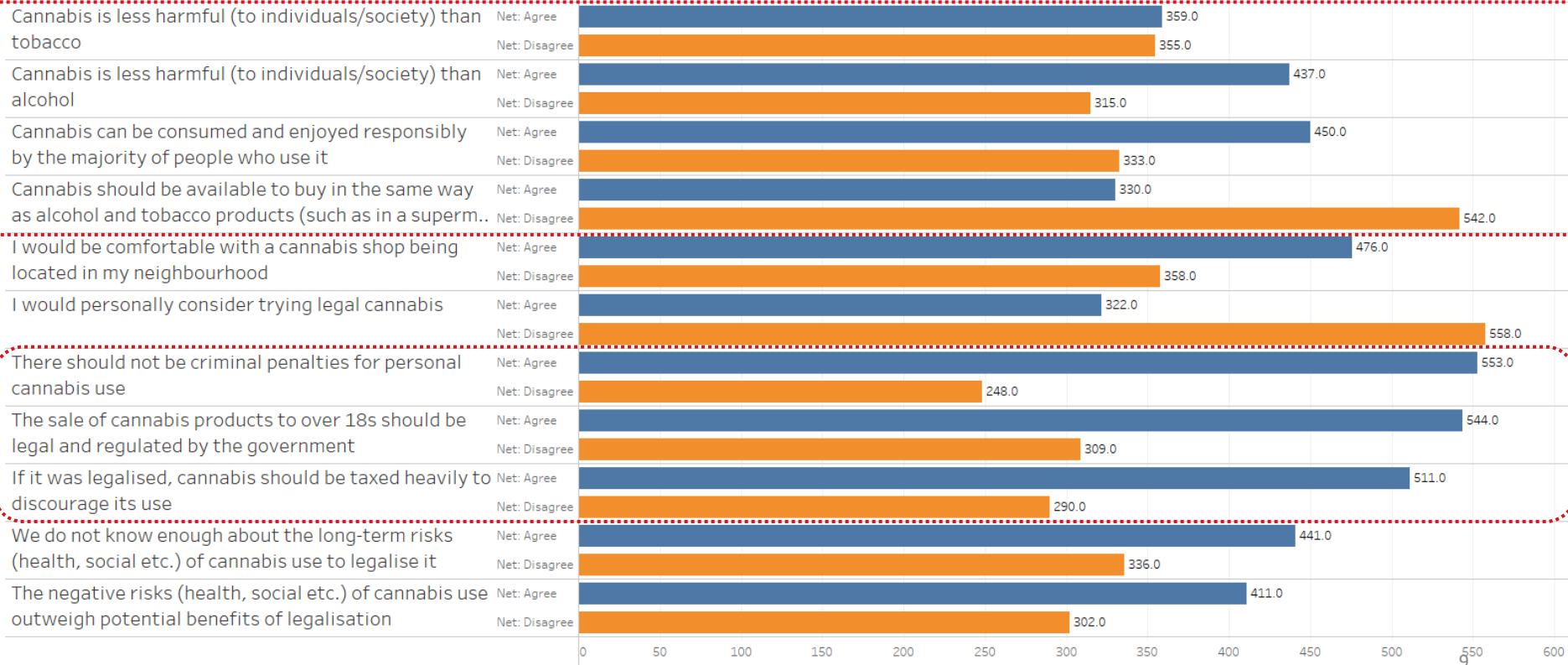
41% of respondents support the legalization of cannabis
Another 29% neither support nor oppose

Biggest support comes from age group 25-34 at 48%
And ranges to the low of 31% by age group 65+

When surveyed about different aspects of cannabis: a push for legalization is clear, but there is still a stigma and many question marks

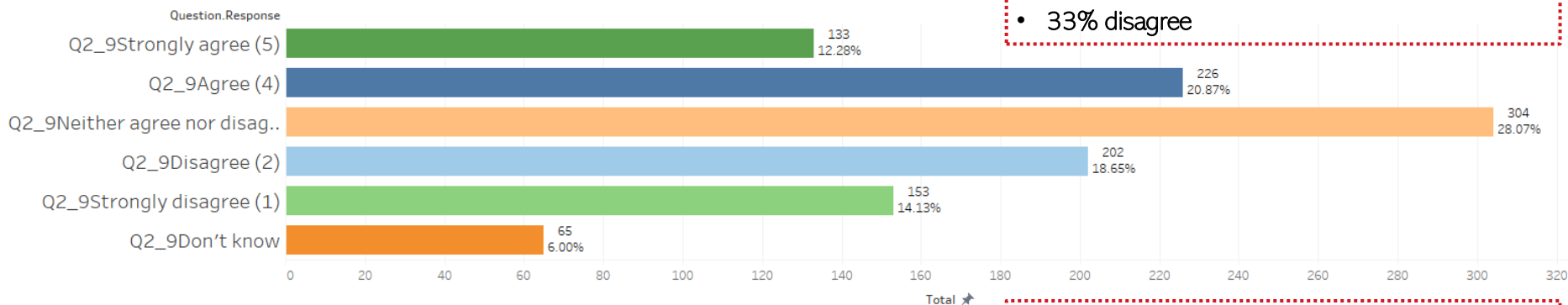
Q2 Sum Agree v Disagree

Q2. Summary table - To what extent do you agree or disagree with the following stat.

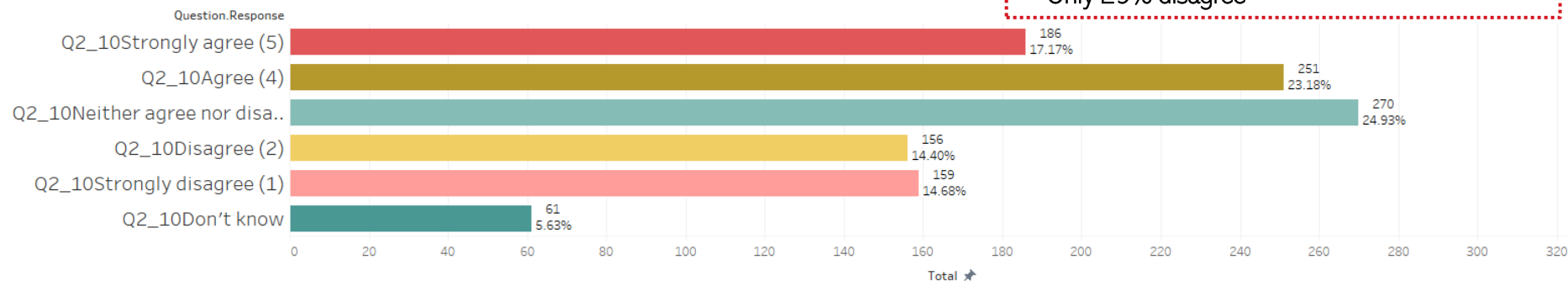


How does cannabis compare to other legal substances?

Q2_9Cann less harm tabac



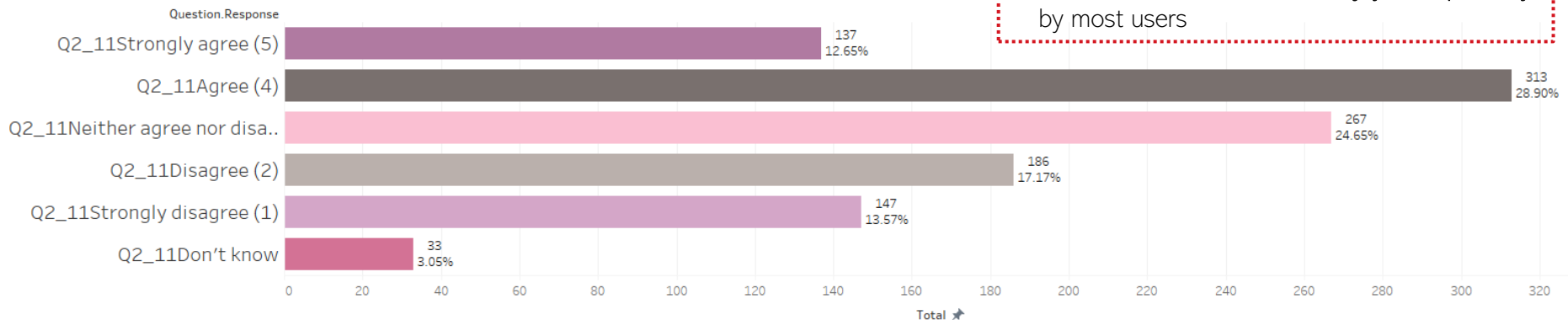
Q2_10Cann less harm alc



Germany thinks it is relatively safe, but when it comes to being available to buy like other legal substances - No Way

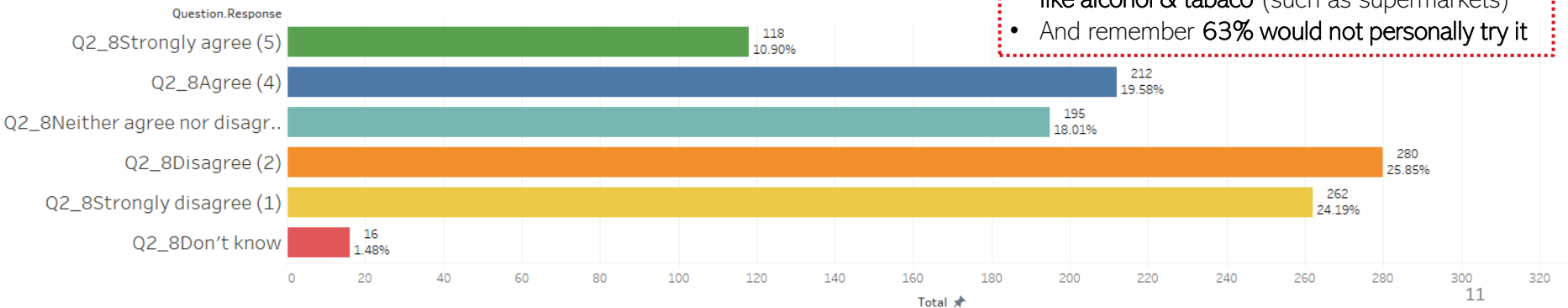
Q2_11Cann can be enjoyed responsibly

- 41% think cannabis can be enjoyed responsibly by most users



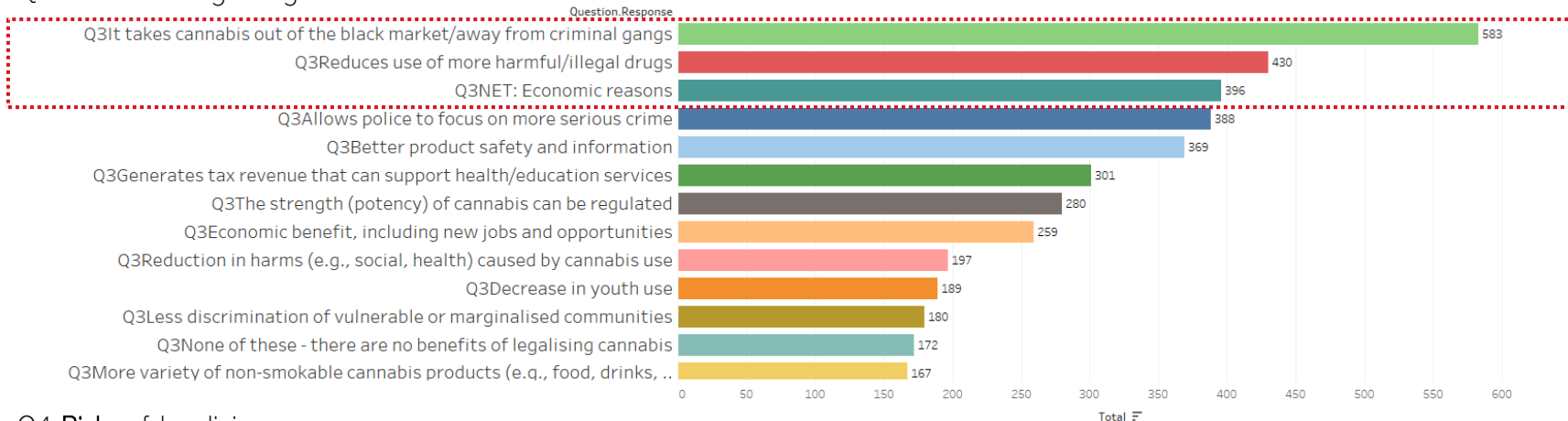
Q2_8Cann Avail Alc/tabac %

- But 50% disagree that it should be available like alcohol & tabaco (such as supermarkets)
- And remember 63% would not personally try it

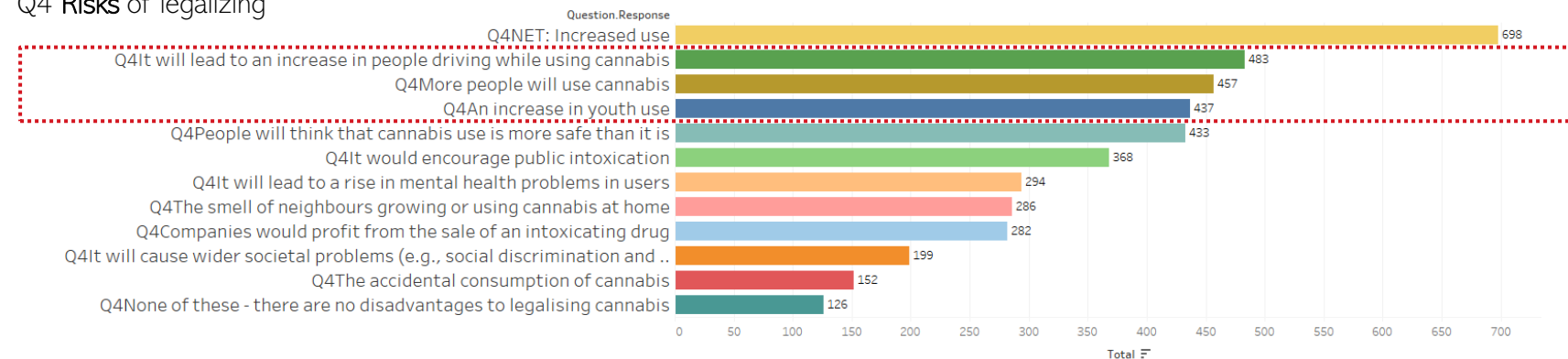


The main benefit is reduction in black market sales and main disadvantage is the risk of increased use

Q3 Benefits of legalizing

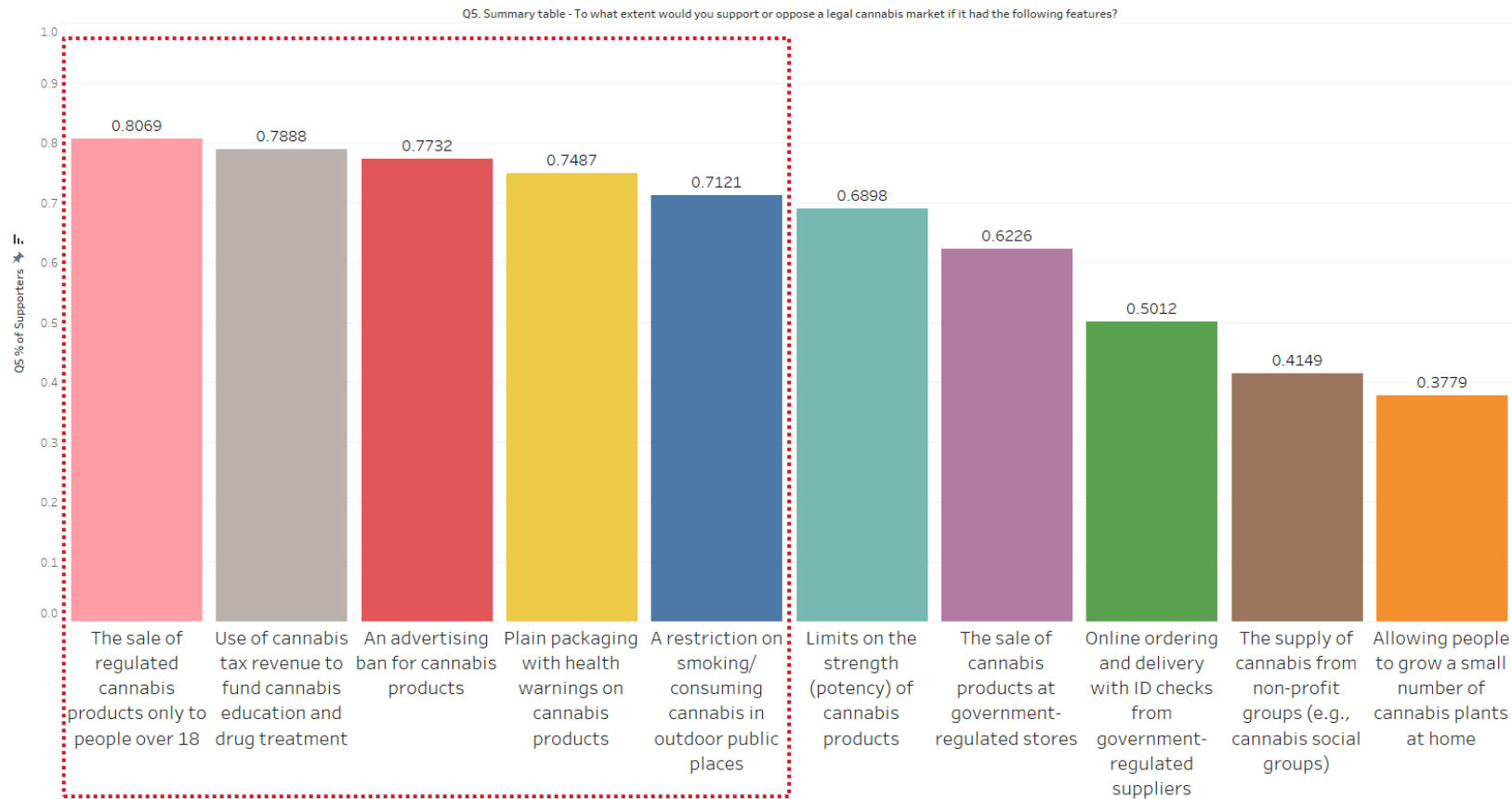


Q4 Risks of legalizing



What features does Germany want to see in a legal recreational market?

Q5 Sum Support & % of Suppt



Key Takeaways

1

Those who would try legal cannabis are **younger, likely male, may not live in cities, and are studying** or have skilled-labor or managerial roles

2

It's safe enough to be legal, but don't want to see it in society – too **many unknowns**. Must increase studies around cannabis and then educate.

3

Stigma still exists –it's ok to consume alcohol and tabaco in public, but not cannabis. Let's tax it, keep it out of sight, and do what's possible to prevent it's use.