



**DALHOUSIE
UNIVERSITY**

FACULTY OF AGRICULTURE

Agri-Food
Analytics Lab

Cannabis & Edibles

Comparison of Canada and USA
Consumer Perspectives

June 2021

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Acknowledgement



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Survey Performance

- Aim of Survey
 - To better understand the perceptions of USA and Canadian consumers regarding cannabis, including edibles
 - Explore the impacts of legalization and the COVID-19 pandemic on those perceptions
- Survey duration: 2 weeks – May 2021
- Sample size = 1047 (Canada) 1037 (USA)
 - Adequate for representation of consumer perspectives
- Bilingual survey across Canada and parallel survey in USA during the same period
- Respondents required to be 19-years old and must have been living in Canada for at least the last 12 months
- Average duration of survey = 8-10 minutes

High-Level Findings

Survey Item	USA		Canada	
Support of legalization for recreational use	Agreement: 75%	Disagreement: 16%	Agreement: 78% ←	Disagreement: 14%
Dried flower is preferred format for buying cannabis	47%	29% - Edibles 9% - Tinctures/oils	45%	25% - Edibles 22% - Tinctures/oils ←
Preferred edibles are confections	39%	19% - Baked goods 10% - Chocolate ←	35%	9% - Baked goods 12% - Chocolate
Primary reason for consuming cannabis	Recreation: 17%	Medical: 12% Wellness: 12%	Recreation: 24% ←	Medical: 10% Wellness: 11%
I would buy cannabis dish in a restaurant	Agreement: 35% ←	Uninterested: 45%	Agreement: 27%	Uninterested: 60% ←
Increased consumption during COVID19	Agreement: 16%	Disagreement: 60%	Agreement: 14%	Disagreement: 63%

High Level Findings

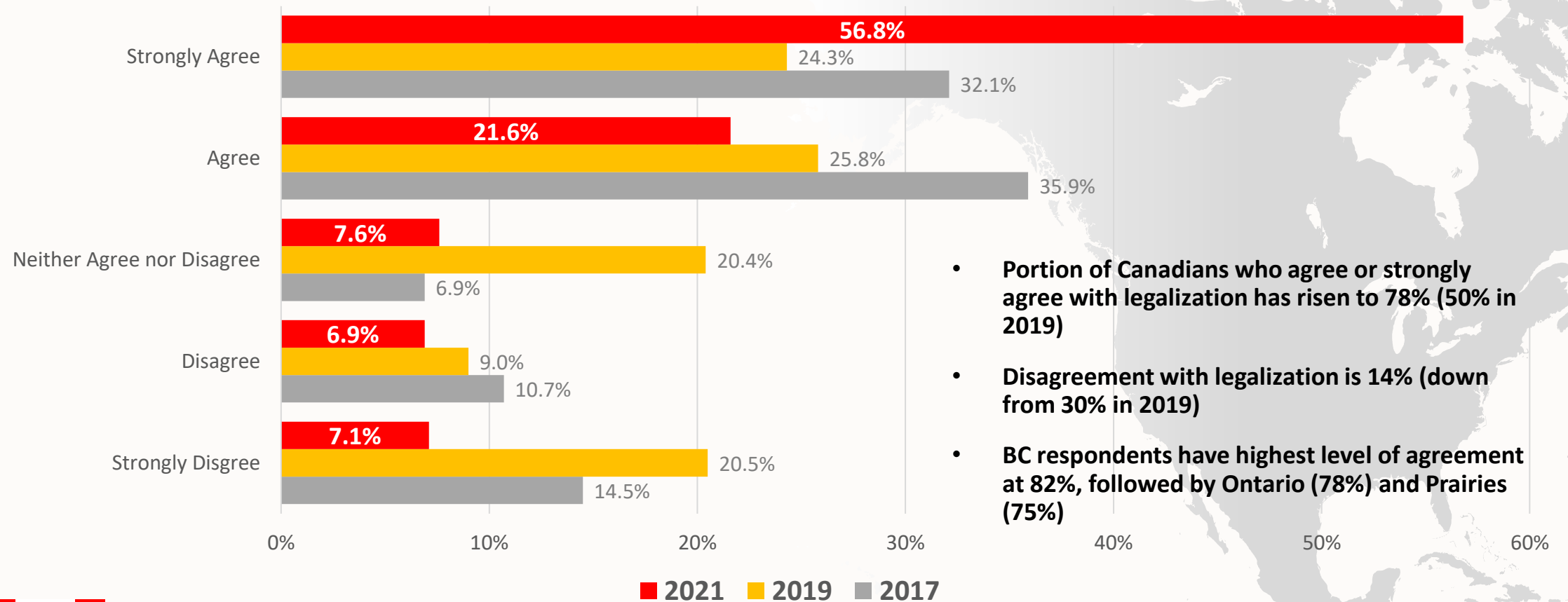
Survey Item	USA		Canada	
Municipalities should be able to ban retailers	Agreement: 33%	Disagreement: 44%	Agreement: 28%	Disagreement: 56%
Concerned about risks of cannabis to youths	Agreement: 51%	Disagreement: 29%	Agreement: 63%	Disagreement: 22%
Concerned about being seen buying cannabis	Agreement: 13%	Disagreement: 61%	Agreement: 17%	Disagreement: 59%
Would not want coworkers to know	Agreement: 26%	Disagreement: 33%	Agreement: 27%	Disagreement: 34%

Other Comparisons

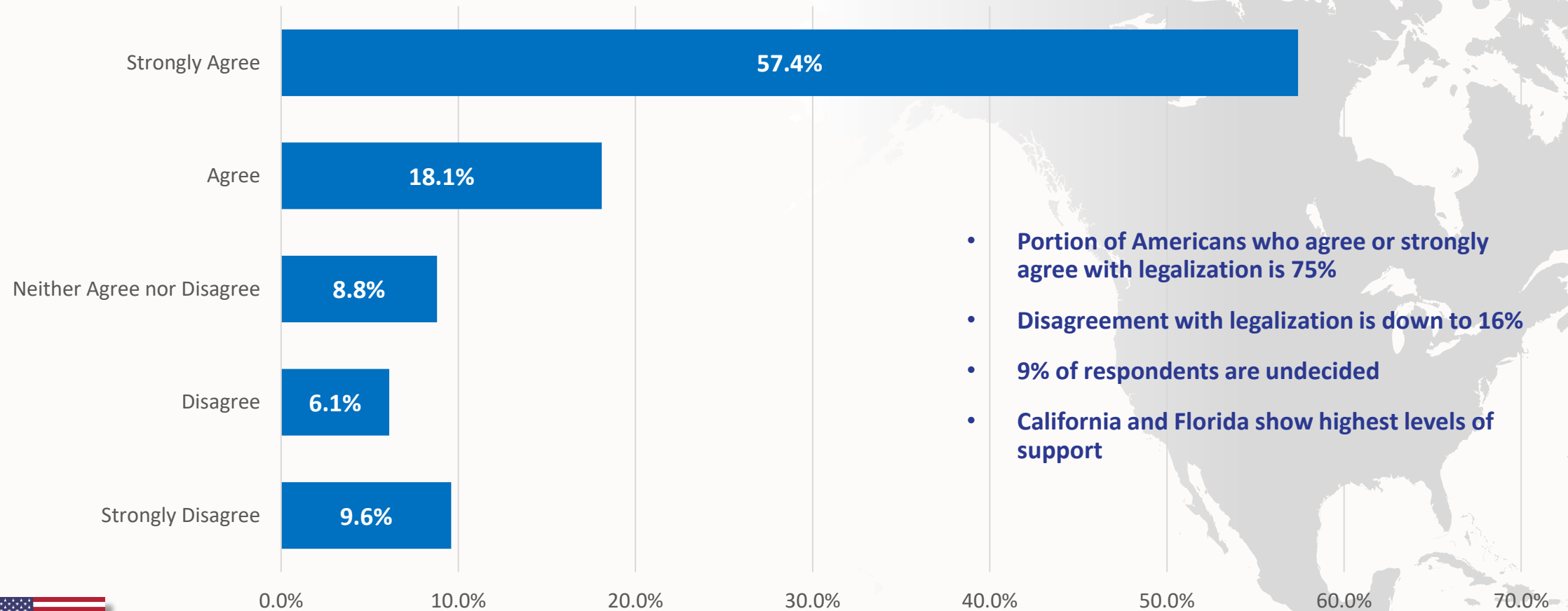
Takeaway: Consumers in Canada and USA have similar attitudes and behaviours regarding cannabis. . . But not identical.

	USA	Canada
Who claim to consume cannabis <u>at least</u> once per week	62% ←	49%
Who are concerned about pets accessing cannabis	47%	61% ←
Purchase cannabis at least once/month	60% ←	52%
Since legalization, have switched to legal sources	45%	60% ←
Plan to consume more edibles in future	21% ←	13%
Find edibles label information meets their needs	21% ←	13%
Use cannabis and alcohol interchangeably	14%	16%

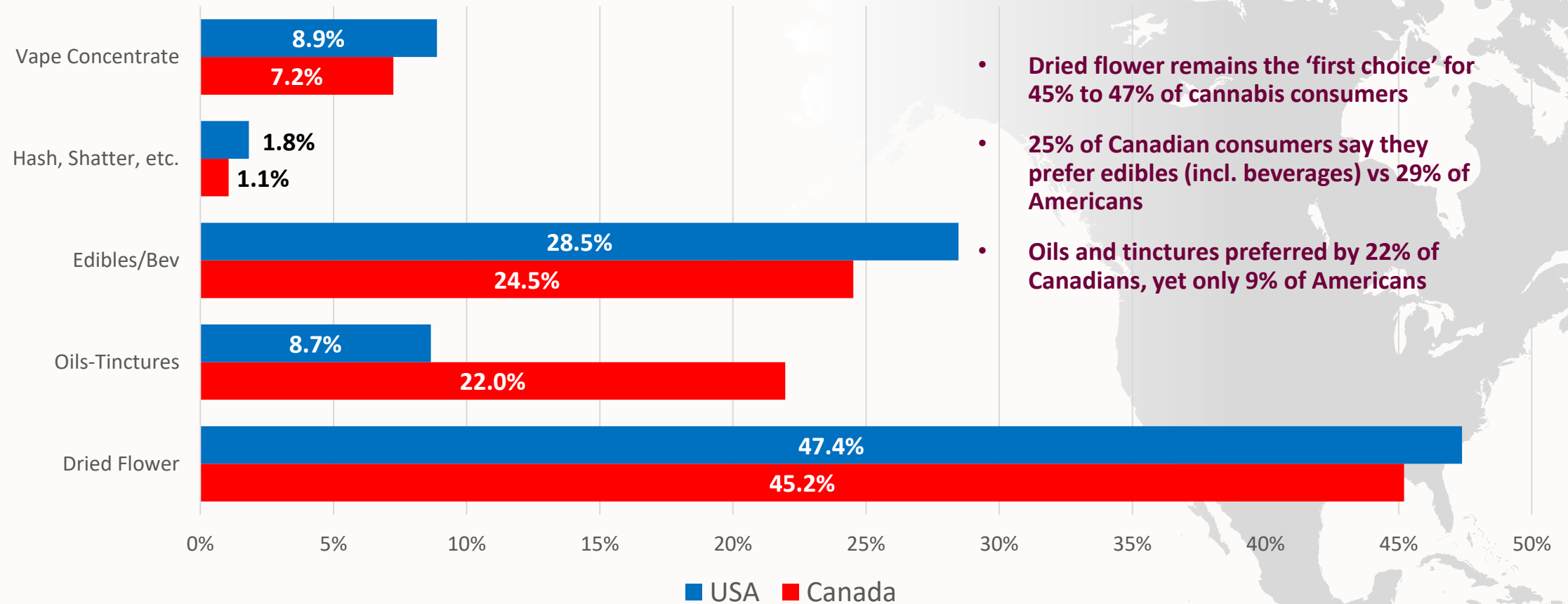
Support Legalization of Cannabis – Canada



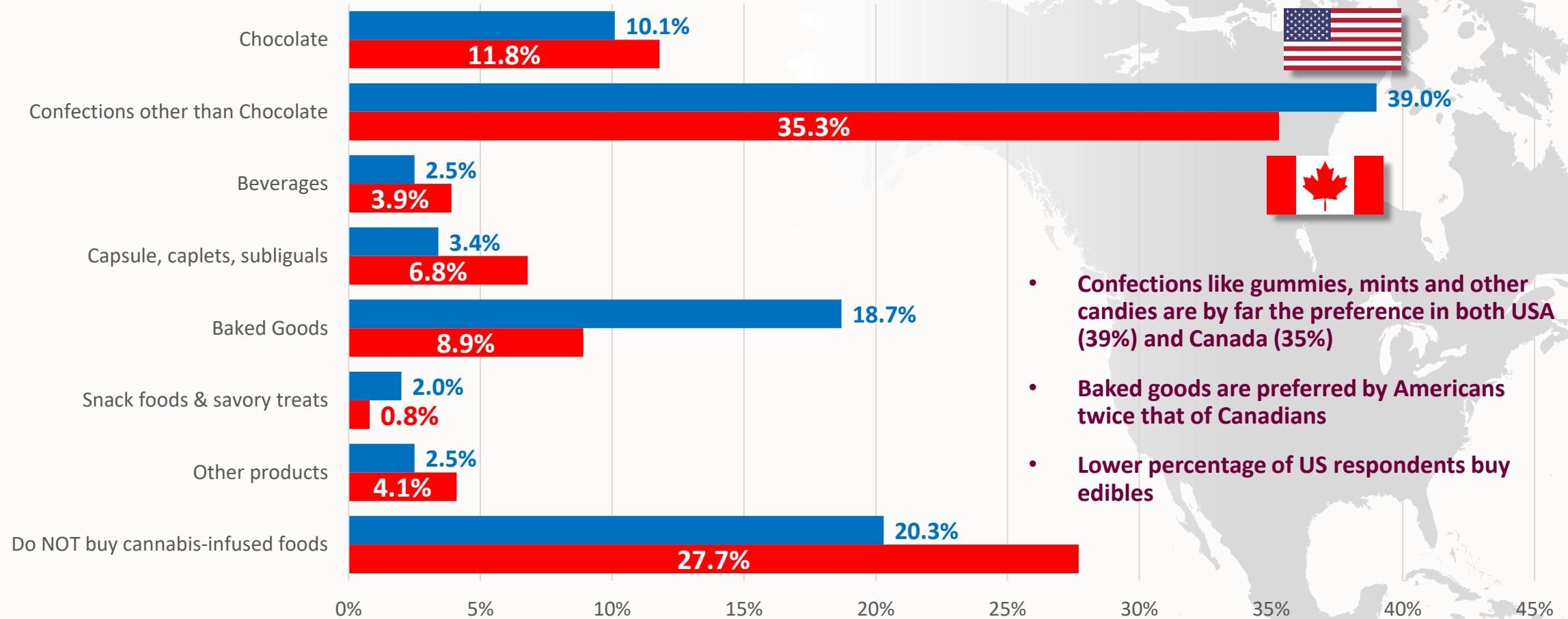
Support Legalization of Cannabis – USA



When you purchase cannabis, which format do you typically buy (mark one)?



If you purchase edibles, what type do you typically buy?

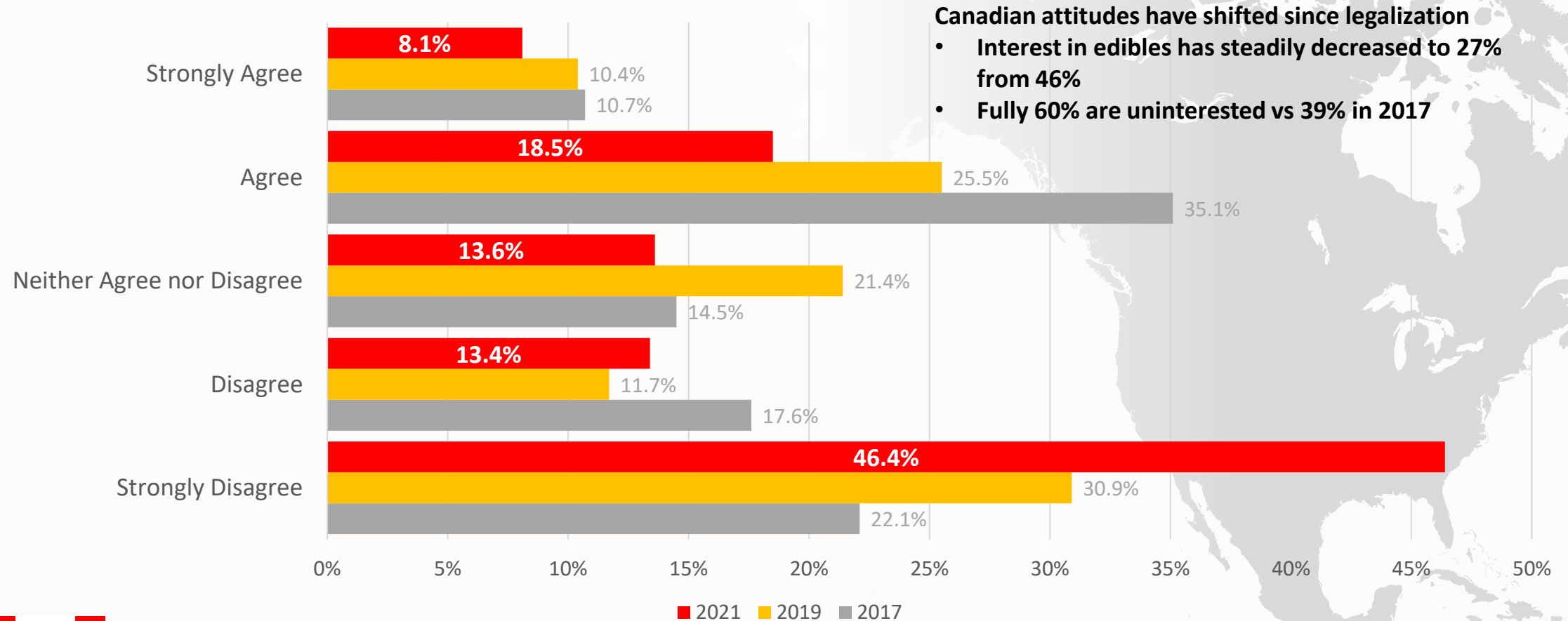


Primary Reasons for Consuming Cannabis

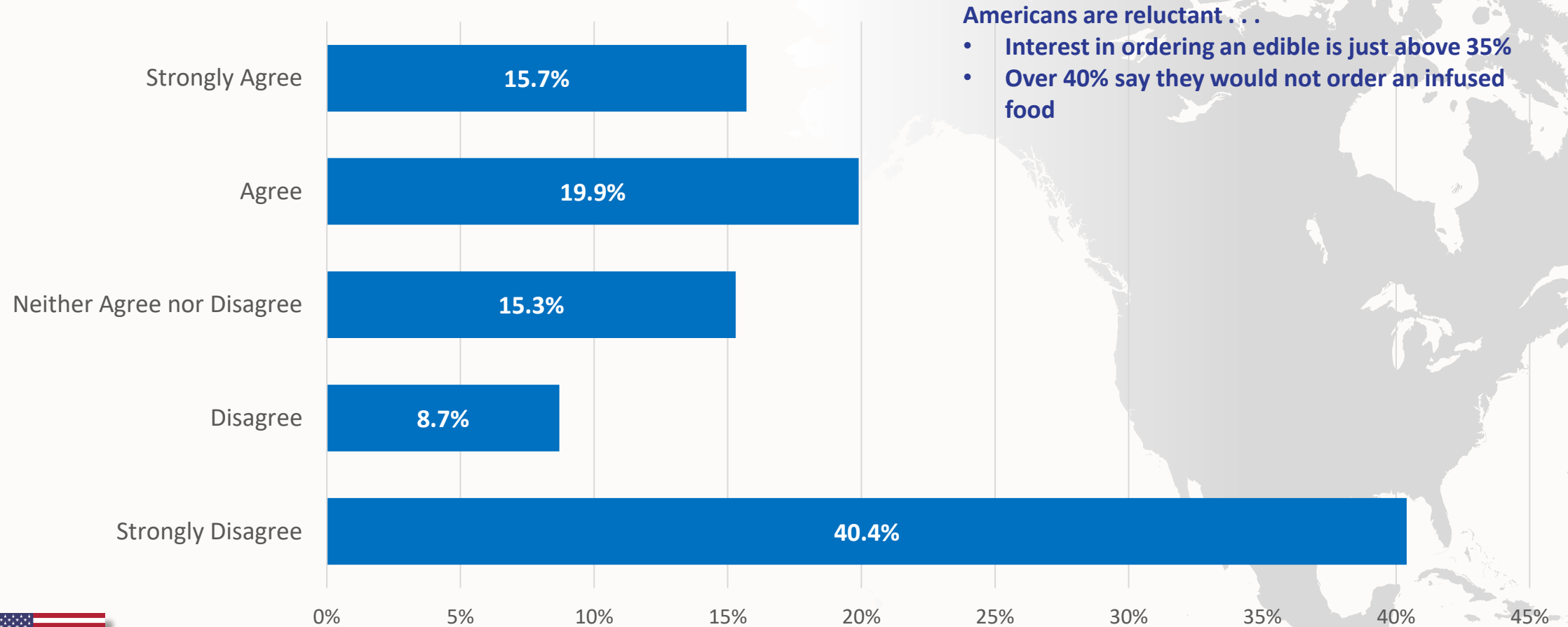
- Recreational (Cannabis for psychoactive effects)
 - 17% of Americans
 - 24% of Canadians
- Medicinal (Cannabis for therapeutic qualities)
 - 12% of Americans
 - 10% of Canadians
- Wellness (Cannabis as part of healthy lifestyle)
 - 12% of Americans
 - 11% of Canadians

Between a quarter and a third of buyers in each country say they consume for both medical and recreational reasons

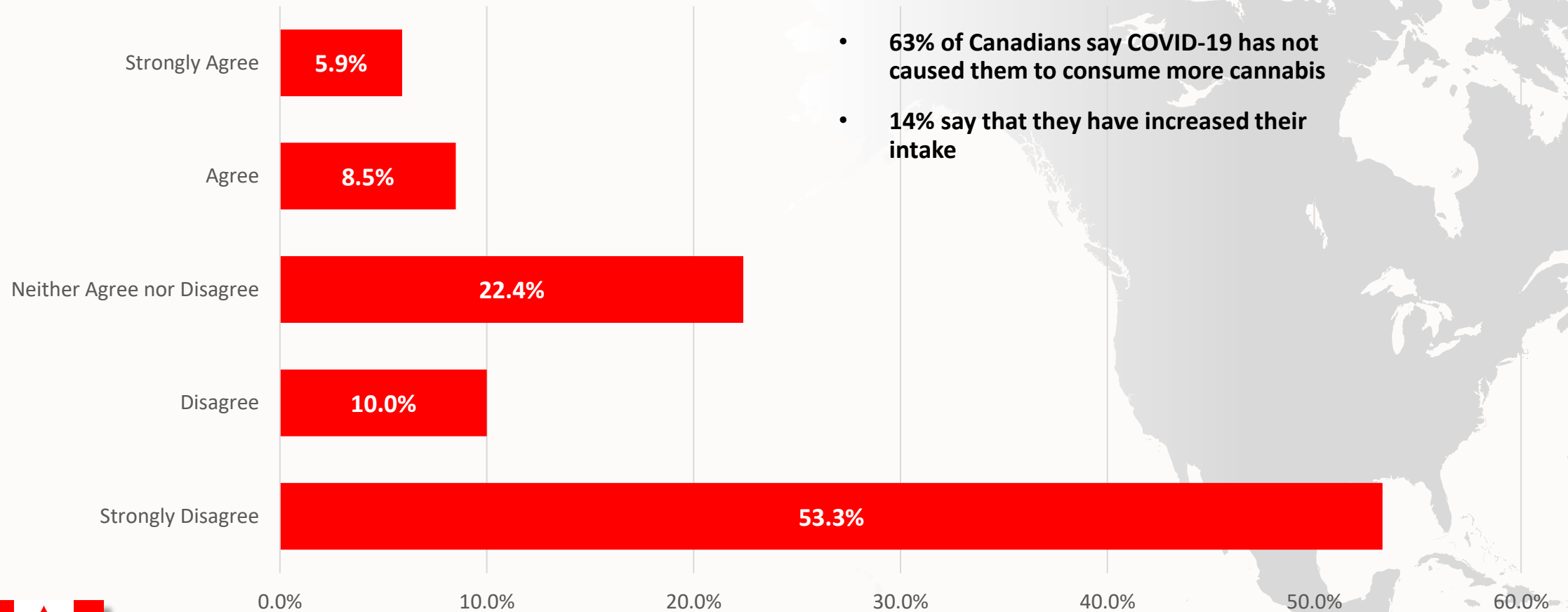
I would purchase cannabis-infused food or drinks at a restaurant



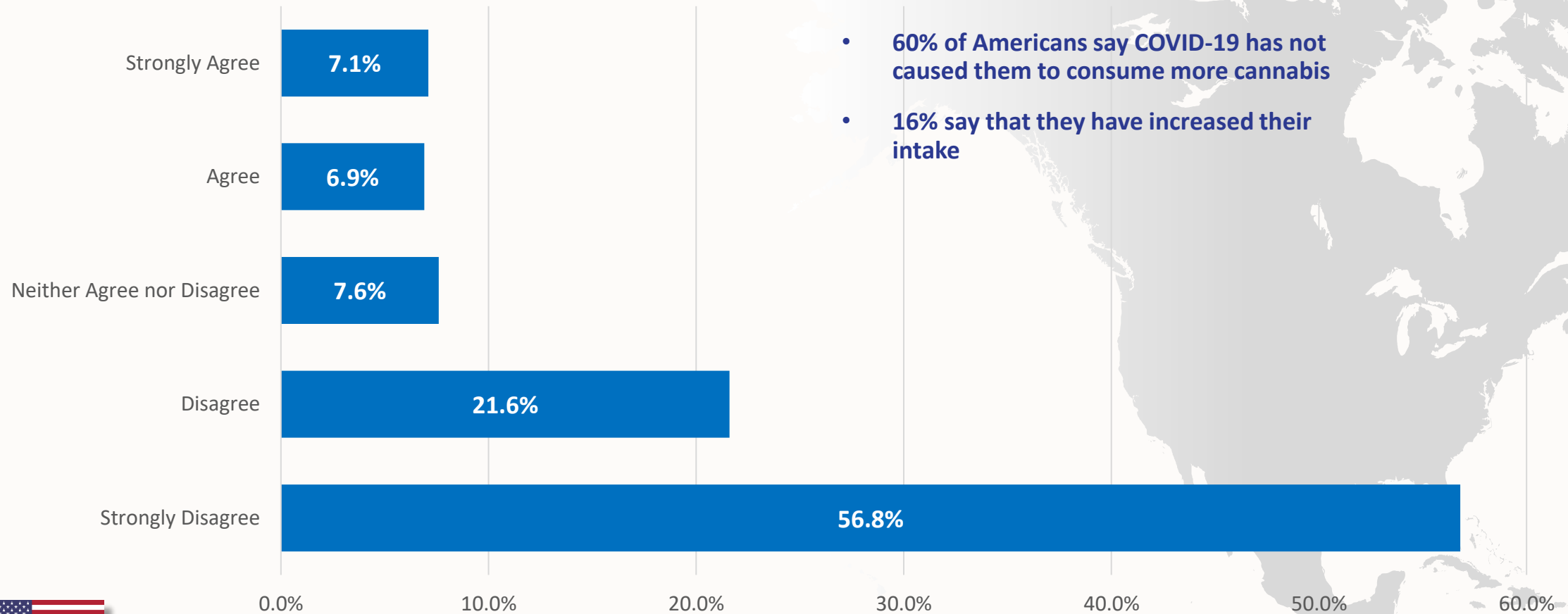
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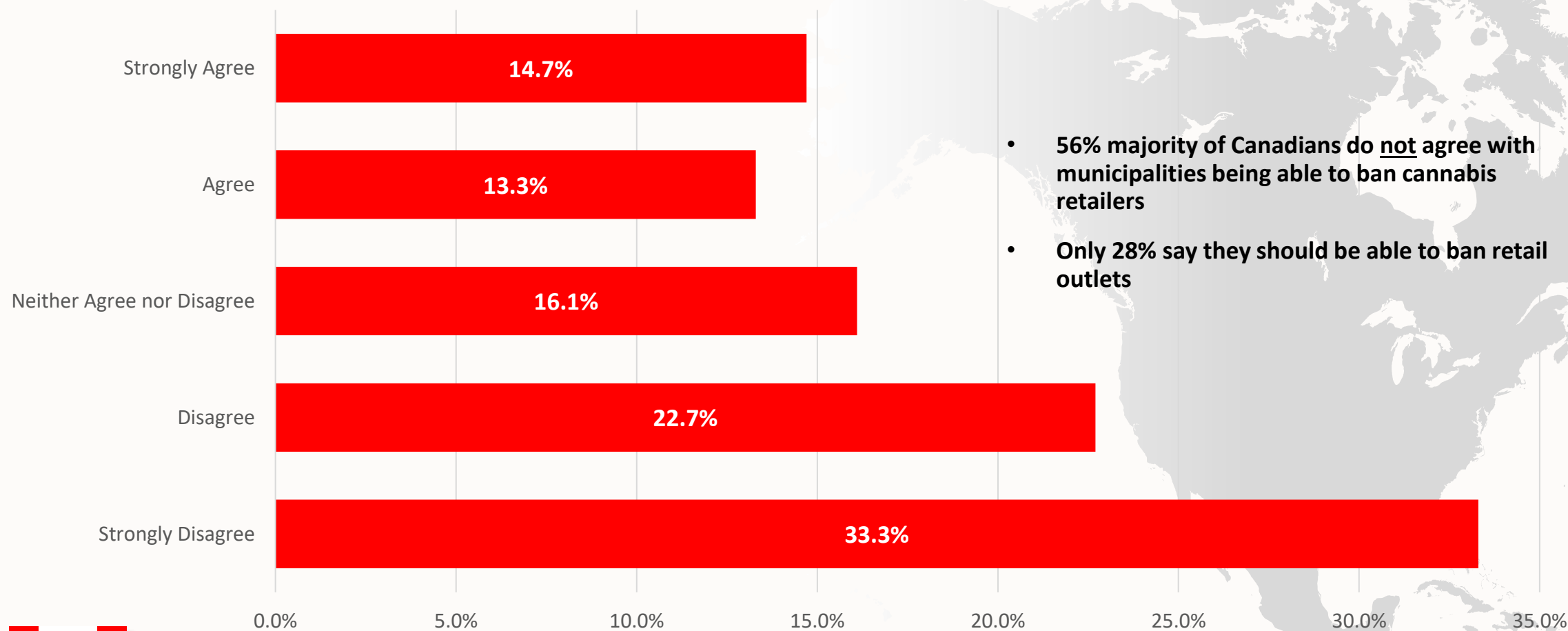
During the COVID19 pandemic, I have increased my consumption of cannabis products



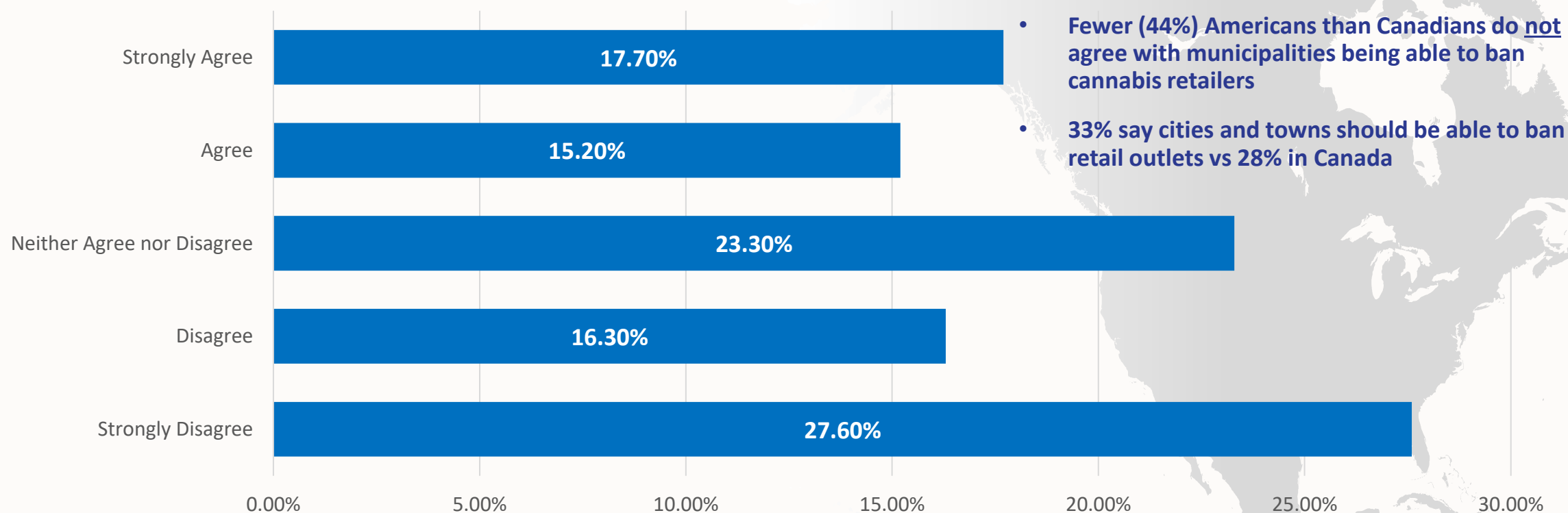
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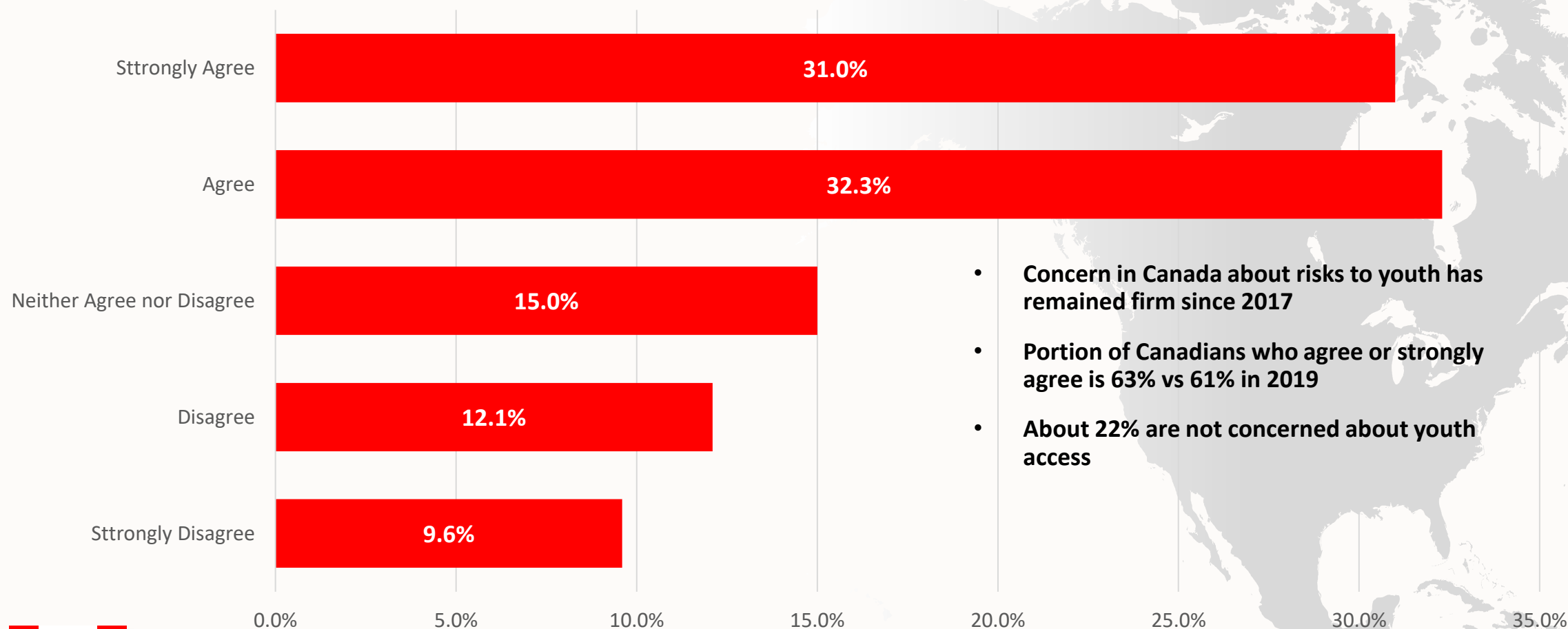
Municipalities should be able to ban cannabis retail facilities within their borders



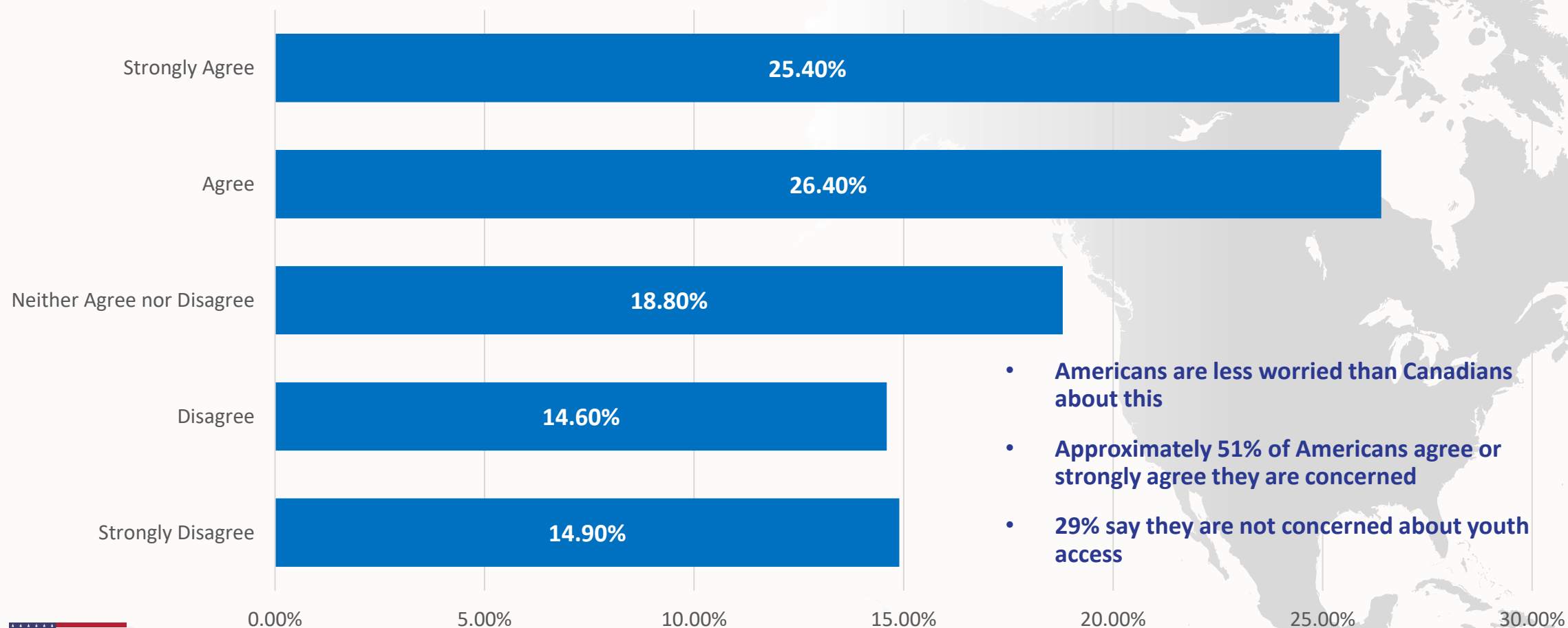
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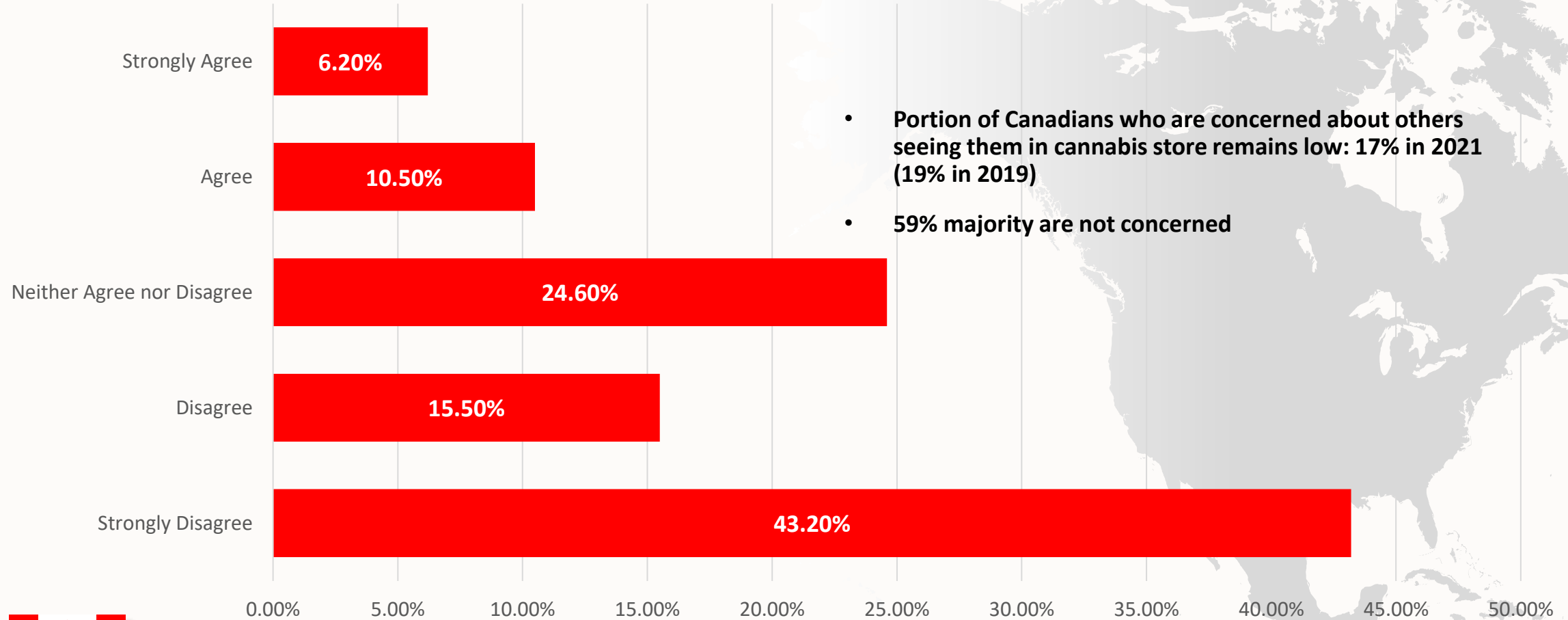
I am concerned about the risks for children and youths



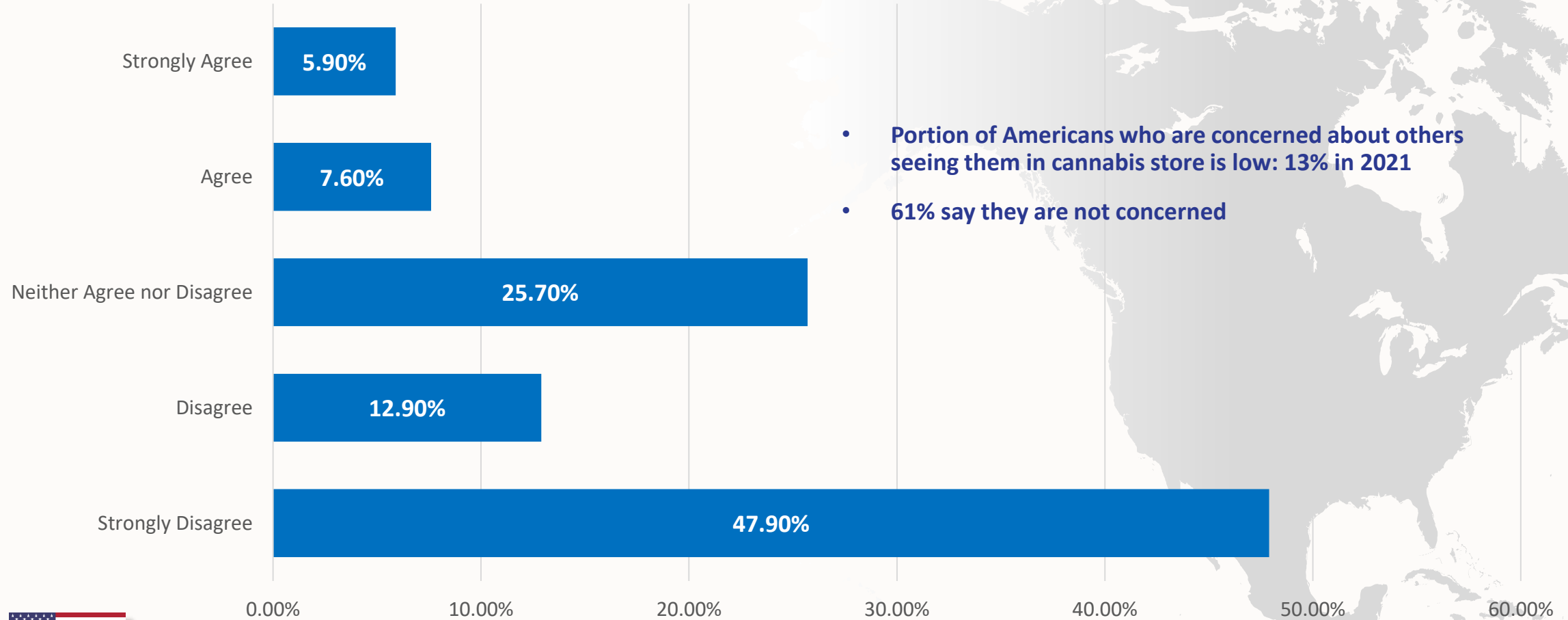
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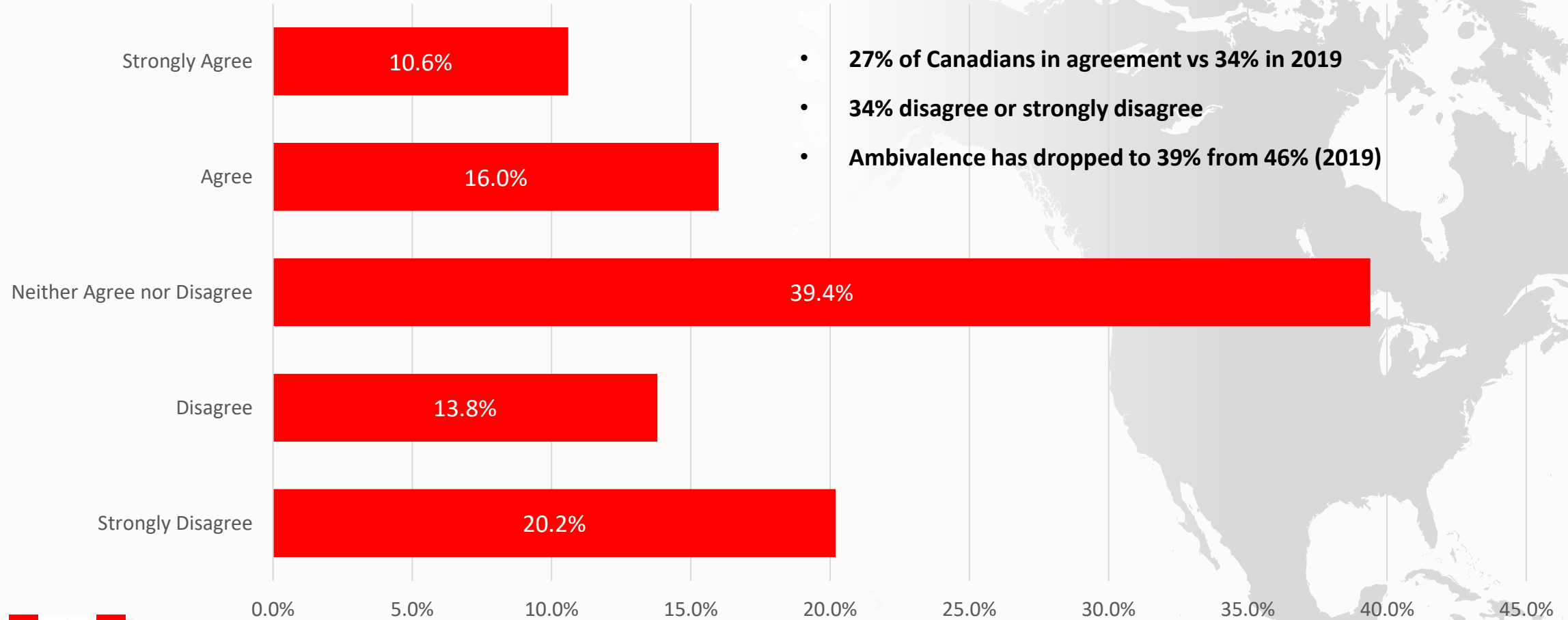
I am concerned about being seen purchasing cannabis



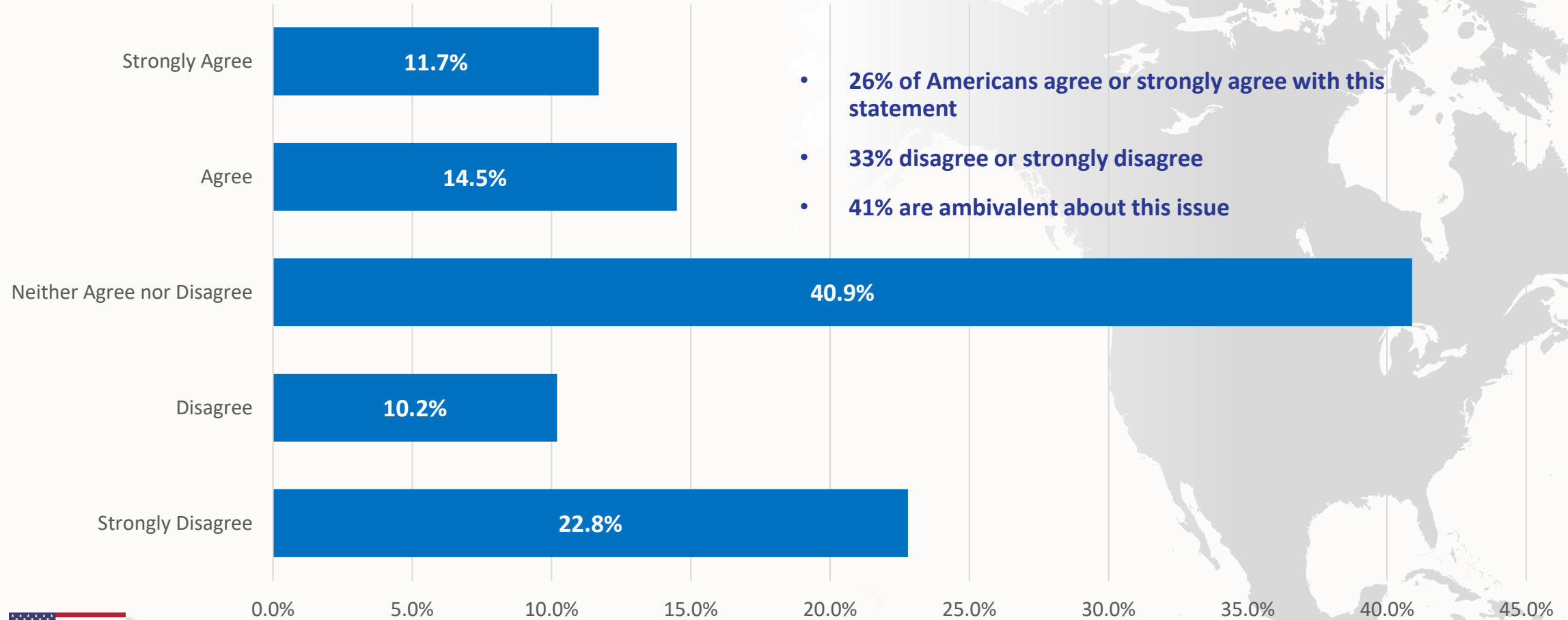
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I would not want coworkers to know that I use cannabis for recreational purposes



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Final Comments

- Social stigma of cannabis is dropping across North America
- Consumer trust being driven by
 - Quality/Consistency
 - Convenience
 - Transparency
 - Price
- Consumer education still lagging and will be vital for success
- Perspective differences in two countries will continue until further normalization

