Acknowledgement
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

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

- Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
## High Level Findings

<table>
<thead>
<tr>
<th>Survey Item</th>
<th>USA</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipalities should be able to ban retailers</td>
<td>Agreement: 33%</td>
<td>Disagreement: 44%</td>
</tr>
<tr>
<td>Concerned about risks of cannabis to youths</td>
<td>Agreement: 51%</td>
<td>Disagreement: 29%</td>
</tr>
<tr>
<td>Concerned about being seen buying cannabis</td>
<td>Agreement: 13%</td>
<td>Disagreement: 61%</td>
</tr>
<tr>
<td>Would not want coworkers to know</td>
<td>Agreement: 26%</td>
<td>Disagreement: 33%</td>
</tr>
</tbody>
</table>

*Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles*
Other Comparisons

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

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

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
Support Legalization of Cannabis - Canada

- Portion of Canadians who agree or strongly agree with legalization has risen to 78% (50% in 2019)
- Disagreement with legalization is 14% (down from 30% in 2019)
- BC respondents have highest level of agreement at 82%, followed by Ontario (78%) and Prairies (75%)

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
Support Legalization of Cannabis - USA

- Portion of Americans who agree or strongly agree with legalization is 75%
- Disagreement with legalization is down to 16%
- 9% of respondents are undecided
- California and Florida show highest levels of support

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
When you purchase cannabis, which format do you typically buy (mark one)?

<table>
<thead>
<tr>
<th>Format</th>
<th>USA</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dried Flower</td>
<td>45.2%</td>
<td>47.4%</td>
</tr>
<tr>
<td>Edibles/Bev</td>
<td>24.5%</td>
<td>28.5%</td>
</tr>
<tr>
<td>Oils-Tinctures</td>
<td>22.0%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Vape Concentrate</td>
<td>8.9%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Hash, Shatter, etc.</td>
<td>1.8%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

- Dried flower remains the ‘first choice’ for 45% to 47% of cannabis consumers.
- 25% of Canadian consumers say they prefer edibles (incl. beverages) vs 29% of Americans.
- Oils and tinctures preferred by 22% of Canadians, yet only 9% of Americans.
If you purchase edibles, what type do you typically buy?

- Confections like gummies, mints and other candies are by far the preference in both USA (39%) and Canada (35%)
- Baked goods are preferred by Americans twice that of Canadians
- Lower percentage of US respondents buy edibles

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
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

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
I would purchase cannabis-infused food or drinks at a restaurant

Canadian attitudes have shifted since legalization
- Interest in edibles has steadily decreased to 27% from 46%
- Fully 60% are uninterested vs 39% in 2017

Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
I would purchase cannabis-infused food or drinks at a restaurant

Americans are reluctant... • Interest in ordering an edible is just above 35% • Over 40% say they would not order an infused food

- Strongly Agree: 15.7%
- Agree: 19.9%
- Neither Agree nor Disagree: 15.3%
- Disagree: 8.7%
- Strongly Disagree: 40.4%

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
During the COVID19 pandemic, I have increased my consumption of cannabis products

- 63% of Canadians say COVID-19 has not caused them to consume more cannabis
- 14% say that they have increased their intake

Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
During the COVID19 pandemic, I have increased my consumption of cannabis products

- 60% of Americans say COVID-19 has not caused them to consume more cannabis
- 16% say that they have increased their intake

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Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
Municipalities should be able to ban cannabis retail facilities within their borders

- 56% majority of Canadians do not agree with municipalities being able to ban cannabis retailers
- Only 28% say they should be able to ban retail outlets

- Strongly Agree: 14.7%
- Agree: 13.3%
- Neither Agree nor Disagree: 16.1%
- Disagree: 22.7%
- Strongly Disagree: 33.3%

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
Municipalities should be able to ban cannabis retail facilities within their borders

- Fewer (44%) Americans than Canadians do not agree with municipalities being able to ban cannabis retailers
- 33% say cities and towns should be able to ban retail outlets vs 28% in Canada

**Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles**
I am concerned about the risks for children and youths

- Strongly Agree: 31.0%
- Agree: 32.3%
- Neither Agree nor Disagree: 15.0%
- Disagree: 12.1%
- Strongly Disagree: 9.6%

- Concern in Canada about risks to youth has remained firm since 2017
- Portion of Canadians who agree or strongly agree is 63% vs 61% in 2019
- About 22% are not concerned about youth access

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
I am concerned about the risks for children and youths

- Americans are less worried than Canadians about this
- Approximately 51% of Americans agree or strongly agree they are concerned
- 29% say they are not concerned about youth access

Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
I am concerned about being seen purchasing cannabis

<table>
<thead>
<tr>
<th></th>
<th>6.20%</th>
<th>10.50%</th>
<th>24.60%</th>
<th>15.50%</th>
<th>43.20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agree</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disagree</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

- Portion of Canadians who are concerned about others seeing them in cannabis store remains low: 17% in 2021 (19% in 2019)
- 59% majority are not concerned

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
I am concerned about being seen purchasing cannabis

- Portion of Americans who are concerned about others seeing them in cannabis store is low: 13% in 2021
- 61% say they are not concerned

*Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles*
I would not want coworkers to know that I use cannabis for recreational purposes

- 27% of Canadians in agreement vs 34% in 2019
- 34% disagree or strongly disagree
- Ambivalence has dropped to 39% from 46% (2019)

- Strongly Agree: 10.6%
- Agree: 16.0%
- Neither Agree nor Disagree: 39.4%
- Disagree: 13.8%
- Strongly Disagree: 20.2%

* Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
I would not want coworkers to know that I use cannabis for recreational purposes

- 26% of Americans agree or strongly agree with this statement
- 33% disagree or strongly disagree
- 41% are ambivalent about this issue

Dalhousie University 2017/19/21 surveys of Canadian & USA consumer perspectives on cannabis & edibles
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