

Research Backgrounder

July 2021

About the Research

Navigator conducted an online poll among 2000 adult Canadians. The survey was in field from January 13 to 19, 2021. All respondents were screened to ensure they were of legal age to use cannabis for recreational purposes (age 18+ in Alberta, age 21+ in Quebec and age 19+ in all other provinces/territories).

A combination of quotas and weights were applied to obtain a representative sample of the population with regards to age, gender, region and education (based on the latest Statistics Canada information available).

One-third (33%) of the 2000 Canadians surveyed indicated they had consumed cannabis (in some form) within the past 12 months (for a weighted sample of 651 past-year cannabis users). While online surveys of this nature are not considered purely random, a nation-wide probability sample of 2000 respondents would yield a margin of error of ± 2.2 percent, 19 times out of 20.

Attitudes towards Cannabis

- Canadians are split in their overall impression of the legalized cannabis sector.
 - o About one-third (35%) have a favourable impression of the sector, while roughly the same proportion reported an unfavourable perception (32%).
 - Despite the muted favourability for the sector itself, the majority of Canadians support the legalization of cannabis in Canada, and support is growing.
 - o Support is twice that of opposition (53% versus 24% respectively).
 - o While most respondents (55%) indicated their opinion has not changed since cannabis became legal, the proportion saying their support has increased (35%) is greater than the proportion reporting they their support for legalization of cannabis has declined (10%).
 - Key demographic differences:
 - o Those in younger age cohorts tend to be most favourable of the sector and the legalization of cannabis.
 - o Men show greater favourability than women.
 - o Regionally, Quebec residents are less favourable than others.
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Communication Habits

- Consumption of cannabis in Canada is prevalent, frequent and on the rise.
 - o One-third of Canadians (33%) report they have consumed cannabis within the past year. Half of this user base (49%) do so at least once a week.
 - o Frequency of consuming cannabis has increased since it became legal: Among the 80% of cannabis users who reported consuming cannabis before it was legalized, 40% indicate their consumption has increased since legalization.
 - o As well, among those who have consumed cannabis since the start of the pandemic, 37% report that their consumption has increased in response to the pandemic.
 - Consuming edibles and smoking cannabis are the two most common ways in which Canadians consume cannabis.
 - o About three-quarters (73%) of cannabis users report consuming edibles and 71% have smoked cannabis within the past year.
 - o Consumption of all forms of cannabis have been on the rise since the start of the pandemic in March 2020. The two forms of cannabis that have seen the greatest uptick in usage are drinks followed by edibles.
 - Key Demographic differences:
 - o Consumption of cannabis is greater among men than women.
 - o Consumption declines with age.
 - o Quebec residents are less likely than others to consume cannabis.
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Purchasing Behaviours

- Cannabis is more often purchased from legal than illegal sources.
 - o Since legalization, 30% of Canadians have made a legal purchase of cannabis
 - o One-in-ten (10%) Canadians (29% of cannabis users) have purchased cannabis illegally since it became legal in the fall of 2018.
- When purchasing cannabis legally, in-person purchasing is most common, although online purchases are also frequently used.
 - o Despite lockdown restrictions, during the pandemic, about half of the legal purchases of cannabis have been made in-person. The other half have largely been made online – for pick-up or delivery. Feedback from purchasers of legal cannabis suggests these purchasing patterns will not change post-pandemic.
 - o Two-thirds (66%) of those who have purchased cannabis legally during the pandemic would be willing to drive up to 10 km to purchase it from a licensed brick-and-mortar store. If required to drive a further distance, most (57%) would make an online purchase for delivery instead. Far fewer indicate they would go without (14%) or resort to purchasing from an illegal source (16%).
- Still, there is a market for illegal cannabis. Cost and lack of access appear to be the biggest barriers to purchasing cannabis legally.
 - o Among cannabis purchasers, 7% stated they ONLY buy from illegal sources. While the sample size is small, those who only purchase illegal cannabis are far less likely than legal purchasers to feel they have quick and convenient access to legal cannabis.
 - o The majority of cannabis users, especially those who have purchased both legally and illegally since the fall of 2018, support all of the various actions that could potentially be used to reduce the size of the illegal cannabis market. The actions garnering the greatest support among those who have purchased both

legally and illegally point to ways to increase access and reduce costs (i.e., improved home delivery, reduced taxes, and increasing storefront visibility).

- Further, the top two reasons selected for purchasing illegal cannabis is “I’d have to pay more for legal cannabis” and “delivery is quick and easy”, underscoring the importance of cost and access.
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Community Stores Selling Legalized Cannabis

- The existence of brick-and-mortar stores licensed to sell cannabis are viewed positively in Canada.
 - Canadians are more likely to support (40%) than oppose (25%) the presence of these stores in their communities.
 - Familiarity engenders support: those aware of a cannabis store in their community are more likely to express support for these stores than those who don’t know of one in their community (47% versus 24% respectively).
 - Among the 70% of Canadians who know of a brick-and-mortar store in their town/city and/or neighbourhood, three-quarters (74%) have not changed their opinion regarding cannabis legalization since the store opened in their community.
 - 58% of Canadians believe that owners of cannabis retailers have proven to be law abiding, good members of their communities whose presence has not negatively impacted their neighbourhoods.
 - The public is polarized in their support for cannabis lounges.
 - One-third (32%) oppose and 37% support these establishments (31% are neutral).
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Experience Inside a Store Selling Legalized Cannabis

- Feedback suggests brick-and-mortar stores licensed to sell cannabis in Canada are attracting shoppers, and visitors are generally pleased with the experience.
 - Many described their in-store experience using positive words. When asked to record the type of feedback they would provide to store owners, it too was positive.
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Knowledge about Cannabis and Brand Selection

- Many Canadians admit to knowing very little about the different products and the science behind cannabis.
 - Almost all (95%) of Canadians indicated that, prior to the survey, they knew cannabis had become legal in this country in the fall of 2018.
 - Yet, fewer consider themselves to be knowledgeable (29%) than unknowledgeable (34%) about cannabis.

- This self-perceived lack of knowledge is particularly prevalent among women and older generations.
- Not surprisingly, past year consumers of cannabis consider themselves to be more knowledgeable than average about the product. Still, there is room to educate even this segment: Only half of them (49%) feel knowledgeable about cannabis.
- Although there is a willingness to experiment, there is also room to improve confidence levels when it comes to selecting a brand.
 - Cannabis users (those who have consumed it since legalization) are just as likely to express a willingness to experiment with different brands (39%) as they are to report always or usually sticking to the same brand or small set of brands (40%).
 - Price, quality and THC content are the three most important qualities considered when selecting a brand.
 - Only 45% of cannabis purchasers are confident in their ability to differentiate between brands, brand or products of cannabis.