

Majority of Canadians support or somewhat support their province's marijuana legalization and distribution plan; have mixed opinions on steps industry is taking to ensure safety and responsible usage

Cannabis Survey Summary - FINAL

submitted by Nanos to Business of Cannabis, December 2017
(Submission 2017-1111)



Summary

A comfortable majority of Canadians say they are familiar or somewhat familiar with their province's plans for marijuana legalization and retail distribution, and support or somewhat support the retail distribution of cannabis in their province. While most Canadians are comfortable or somewhat comfortable consuming alcohol with their families, a majority say they are at least somewhat uncomfortable doing the same with cannabis. A majority of Canadians believe that marijuana has medical benefits, but a minority of Canadians say the industry is taking sufficient steps to ensure safety and responsible usage.

- **Most Canadians are familiar or somewhat familiar with their province's plans for legalization and retail distribution of marijuana** – When asked about their familiarity with the current plans for legalization and retail distribution of marijuana in their province, nearly nine in ten Canadians say they are familiar (42%) or somewhat familiar (46%), while just over one in ten are unfamiliar (four per cent) or somewhat unfamiliar (nine per cent) .
- **Seven in ten Canadians support or somewhat support the legalization and retail distribution of marijuana in their province** – A majority of Canadians say that they support (49%) or somewhat support (21%) the legalization and retail distribution of marijuana in their province, while just over one in four oppose (19%) or somewhat oppose (nine per cent) this. Two per cent are unsure.
- **Majority of Canadians are comfortable or somewhat comfortable with the amount of public information available on the legalization of marijuana** – Just over three in five Canadians say they are comfortable (27%) or somewhat comfortable (35%) with the public information available on the legalization of marijuana/cannabis, while just over three in ten say they are uncomfortable (17%) or somewhat uncomfortable (18%) with it. Five per cent are unsure.
- **Over four in five Canadians are comfortable or somewhat comfortable consuming alcohol with their family** – When asked about their comfort level with consuming alcohol with family, the majority of Canadians say they are comfortable (62%) or somewhat comfortable (23%), while eight per cent say they are uncomfortable and seven per cent are somewhat uncomfortable. One per cent are unsure.

- **Nearly two in three Canadians say they are uncomfortable or somewhat uncomfortable with consuming cannabis products with their family** – Well over half of Canadians say that they are uncomfortable (48%) or somewhat uncomfortable (17%) consuming cannabis products with their family, while nearly three in ten say they are comfortable (14%) or somewhat comfortable (15%) doing so. Six per cent are unsure.
- **Canadians have mixed opinions on whether the marijuana industry is taking sufficient steps to ensure safety and responsible usage** – When asked whether they agree that the marijuana and cannabis industry is taking sufficient steps to ensure safety and responsible usage Canadians are split, with around two in five saying that they agree (17%) or somewhat agree (25%), and another two in five who say they disagree (24%) or somewhat disagree (16%). Eighteen per cent are unsure.
- **Over four in five Canadians agree or somewhat agree that there are medical benefits to marijuana and cannabis consumption** – When asked their level of agreement with the statement that there are medical benefits to marijuana and cannabis consumption, more than four in five Canadians say they agree (49%) or somewhat agree (32%) with this, while six per cent disagree and seven per cent somewhat disagree. Six per cent are unsure.

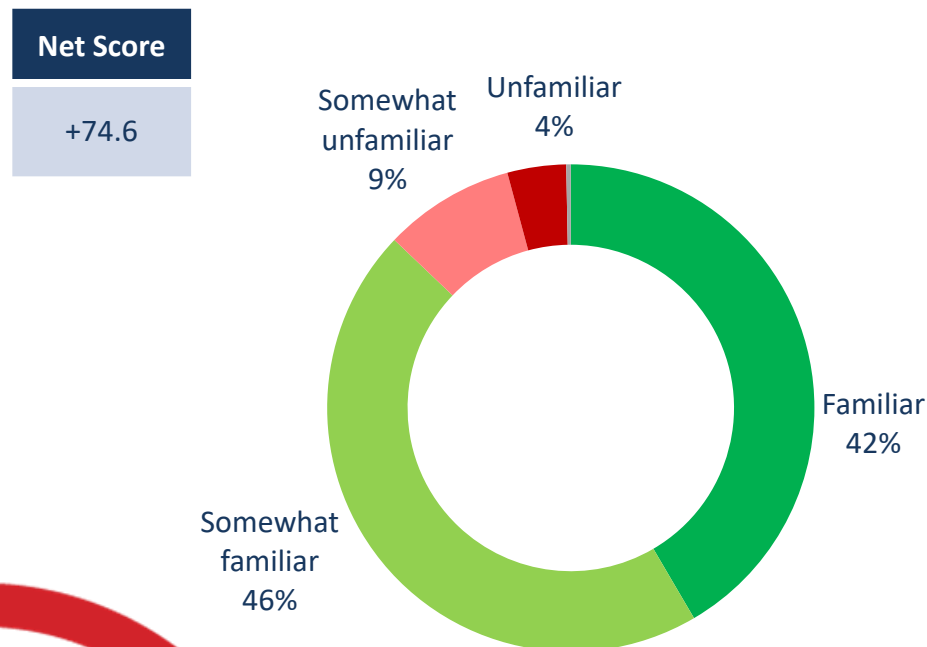
These observations are based on a hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 6th and 10th, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

This study was commissioned by The Business of Cannabis and the research was conducted by Nanos Research.

Familiarity with marijuana legalization and retail plans

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



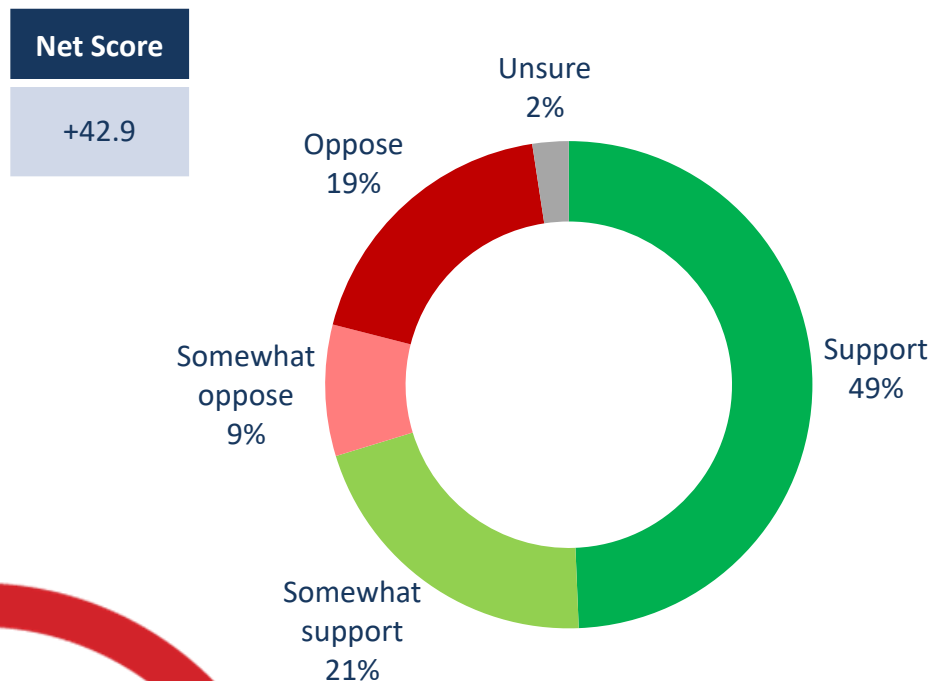
Subgroups	Familiar/ Somewhat familiar
Atlantic (n=100)	85.4%
Quebec (n=250)	84.2%
Ontario (n=300)	91.3%
Prairies (n=200)	85.8%
British Columbia (n=150)	86.6%
Male (n=506)	88.0%
Female (n=494)	86.3%
18 to 34 (n=252)	84.9%
35 to 54 (n=372)	87.9%
55 plus (n=376)	88.0%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Are you familiar, somewhat familiar, somewhat unfamiliar or unfamiliar with the current plans for the legalization and retail distribution of marijuana in your province?

Support for marijuana legalization and retail distribution

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



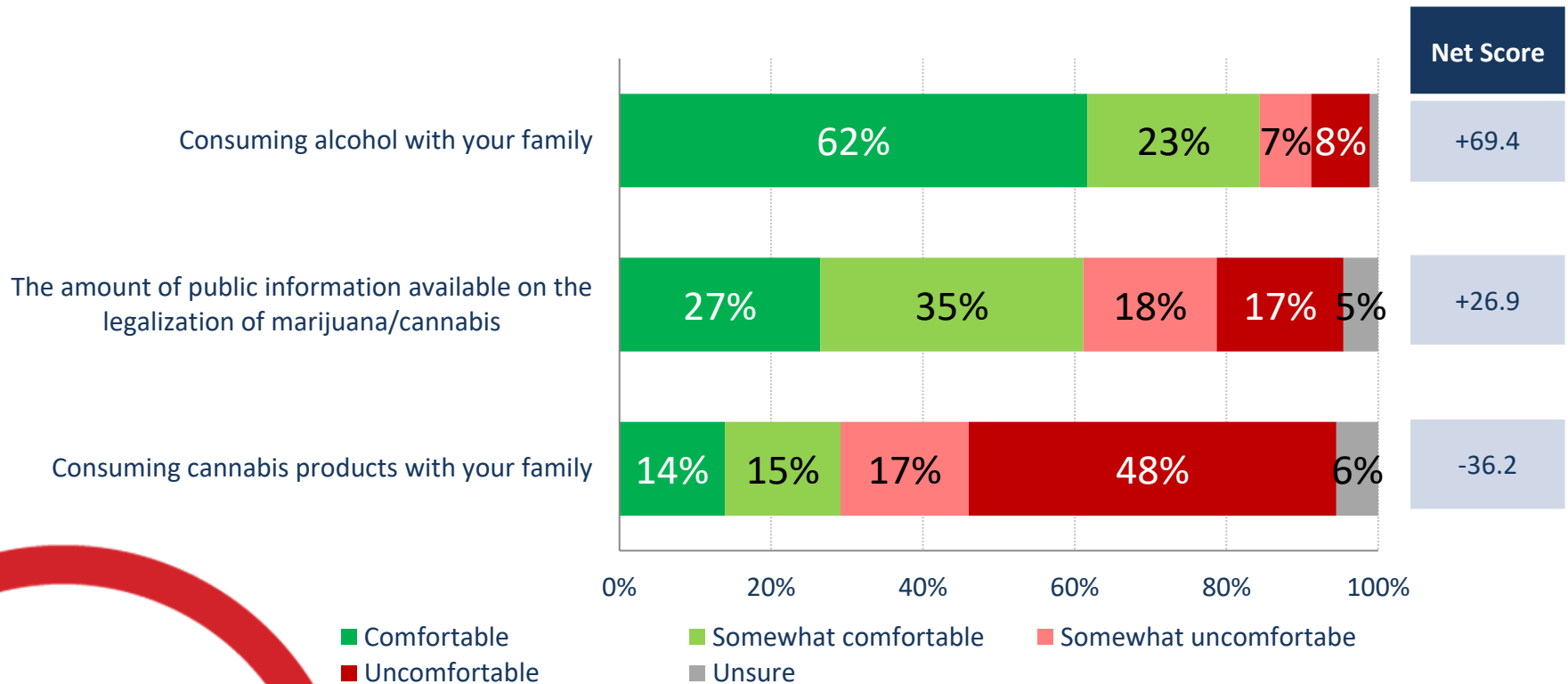
Subgroups	Support/ Somewhat support
Atlantic (n=100)	76.7%
Quebec (n=250)	65.5%
Ontario (n=300)	71.4%
Prairies (n=200)	67.6%
British Columbia (n=150)	74.7%
Male (n=506)	70.8%
Female (n=494)	69.7%
18 to 34 (n=252)	82.1%
35 to 54 (n=372)	67.6%
55 plus (n=376)	64.2%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the legalization and retail distribution of marijuana in your province?

Comfort with statements on marijuana and alcohol

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

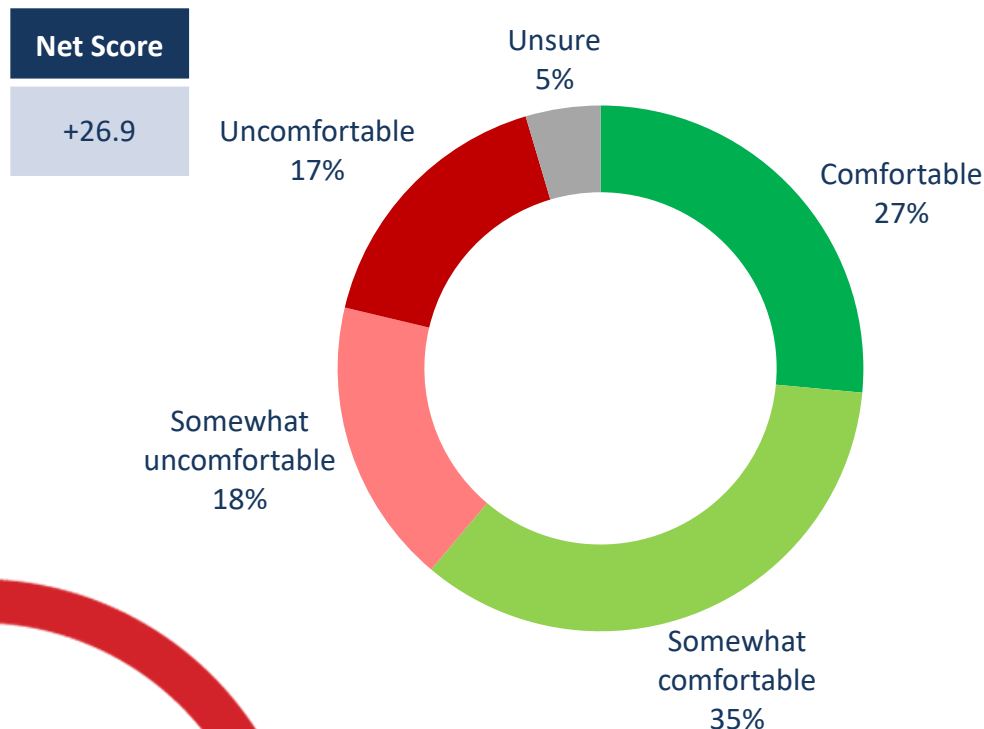


*Note: Charts may not add up to 100 due to rounding

QUESTION – Are you comfortable, somewhat comfortable, somewhat uncomfortable, or uncomfortable with the following:

Comfort with available information and consumption of marijuana/cannabis

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Comfortable / Somewhat comfortable
Atlantic (n=100)	73.4%
Quebec (n=250)	64.5%
Ontario (n=300)	59.1%
Prairies (n=200)	51.4%
British Columbia (n=150)	64.4%
Male (n=506)	60.2%
Female (n=494)	62.0%
18 to 34 (n=252)	69.2%
35 to 54 (n=372)	63.0%
55 plus (n=376)	53.8%

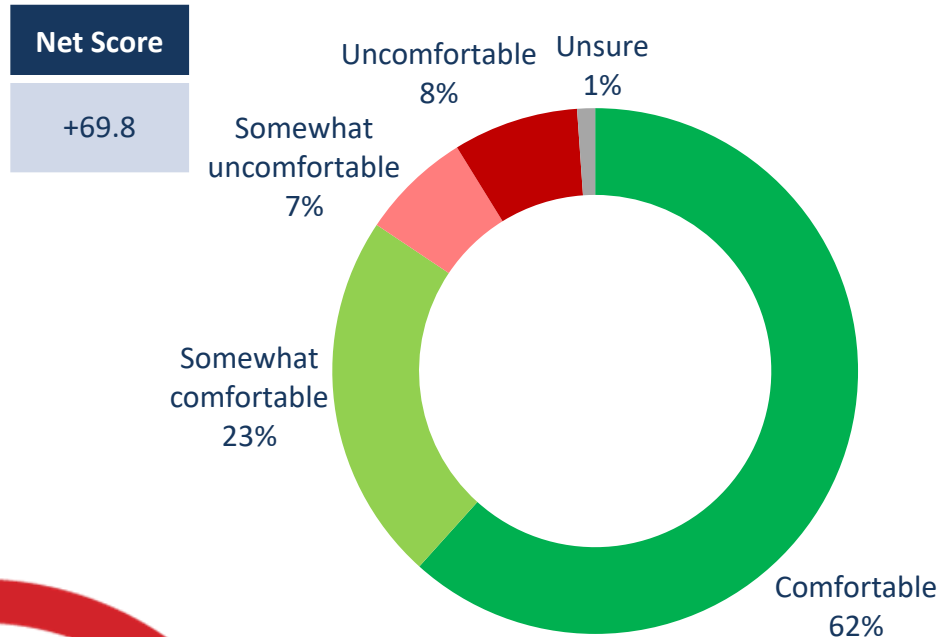
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Are you comfortable, somewhat comfortable, somewhat uncomfortable, or uncomfortable with the following:

The amount of public information available on the legalization of marijuana/cannabis

Comfort with alcohol consumption

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Comfortable / Somewhat comfortable
Atlantic (n=100)	82.4%
Quebec (n=250)	82.1%
Ontario (n=300)	89.8%
Prairies (n=200)	82.0%
British Columbia (n=150)	81.4%
Male (n=506)	84.0%
Female (n=494)	84.7%
18 to 34 (n=252)	82.7%
35 to 54 (n=372)	85.2%
55 plus (n=376)	84.7%

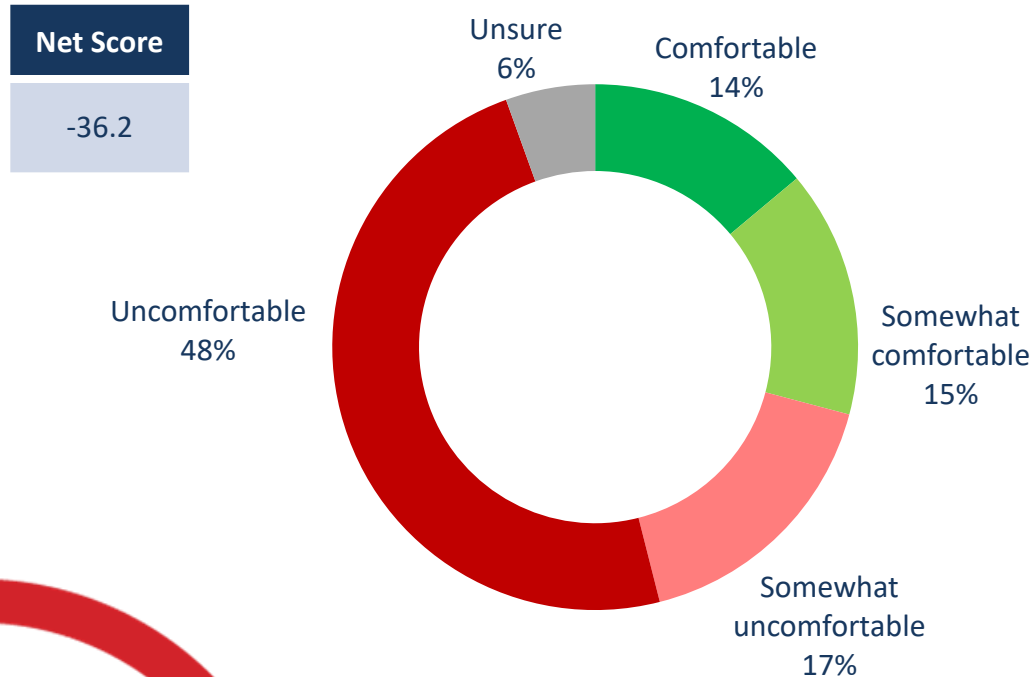
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Are you comfortable, somewhat comfortable, somewhat uncomfortable, or uncomfortable with the following:

Consuming alcohol with your family

Comfort with consumption of cannabis products

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Uncomfortable
Atlantic (n=100)	34.2%
Quebec (n=250)	52.3%
Ontario (n=300)	49.1%
Prairies (n=200)	50.4%
British Columbia (n=150)	47.1%
Male (n=506)	48.0%
Female (n=494)	48.8%
18 to 34 (n=252)	30.8%
35 to 54 (n=372)	53.4%
55 plus (n=376)	56.3%

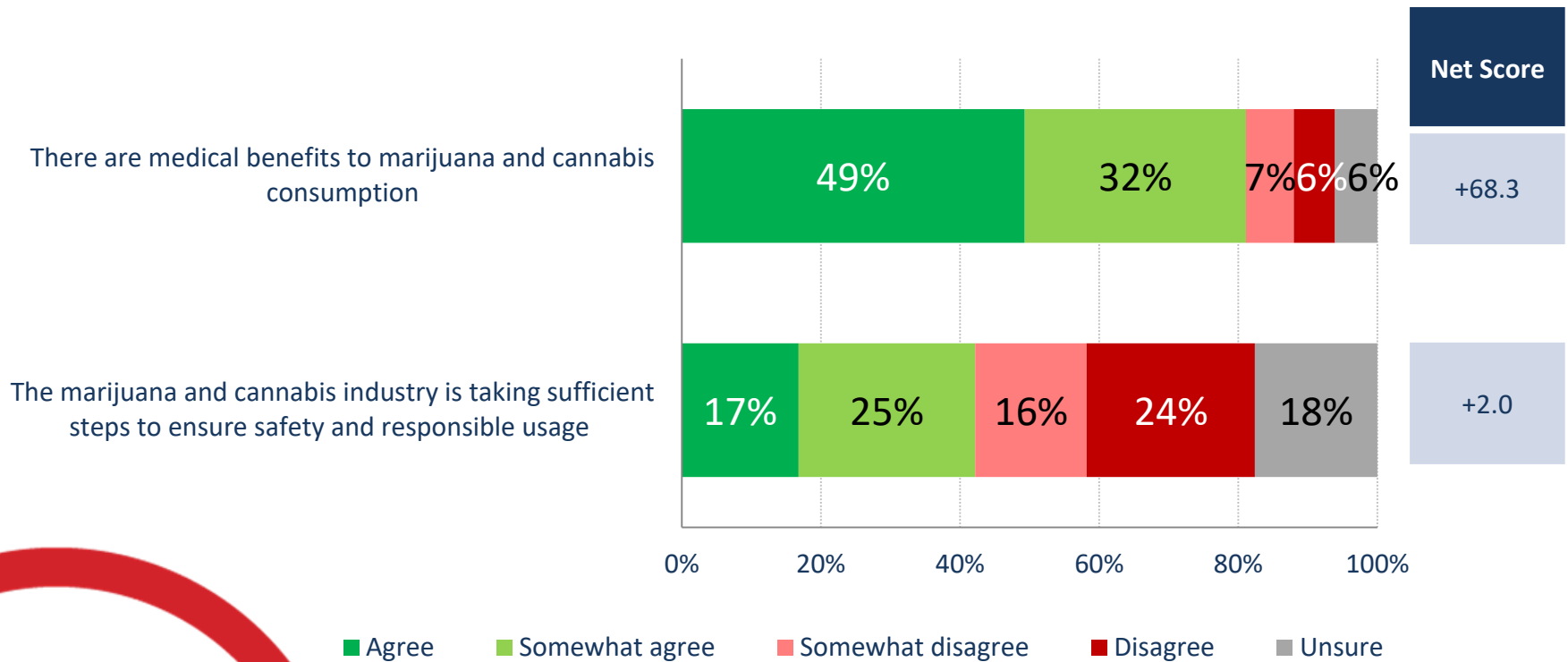
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Are you comfortable, somewhat comfortable, somewhat uncomfortable, or uncomfortable with the following:

Consuming cannabis products with your family

Responsible usage and medical benefits of marijuana

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

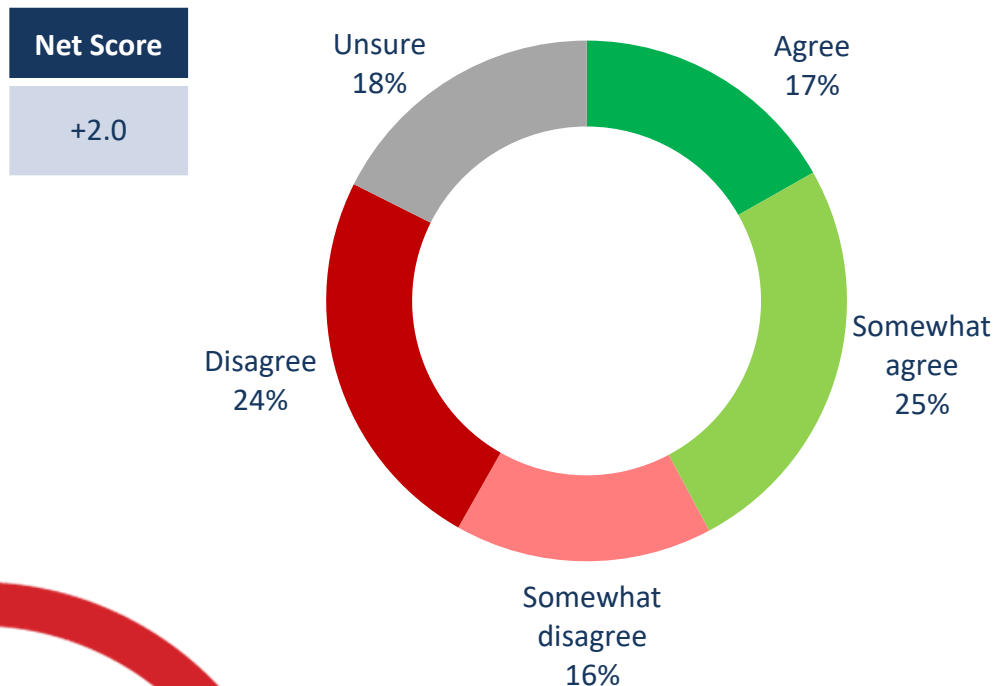


*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with each of the following?

Marijuana industry steps to ensure safety and responsible usage

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Agree / Somewhat agree
Atlantic (n=100)	53.2%
Quebec (n=250)	38.8%
Ontario (n=300)	40.3%
Prairies (n=200)	44.0%
British Columbia (n=150)	42.0%
Male (n=506)	44.8%
Female (n=494)	39.7%
18 to 34 (n=252)	58.7%
35 to 54 (n=372)	39.7%
55 plus (n=376)	33.0%

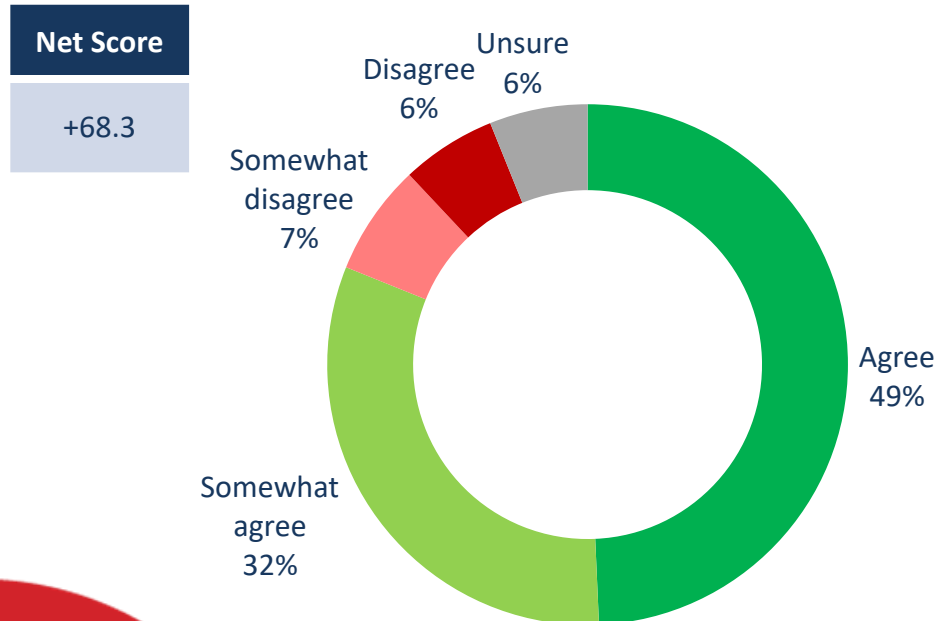
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with each of the following?

The marijuana and cannabis industry is taking sufficient steps to ensure safety and responsible usage

Medical benefits of marijuana consumption

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 6th to 10th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

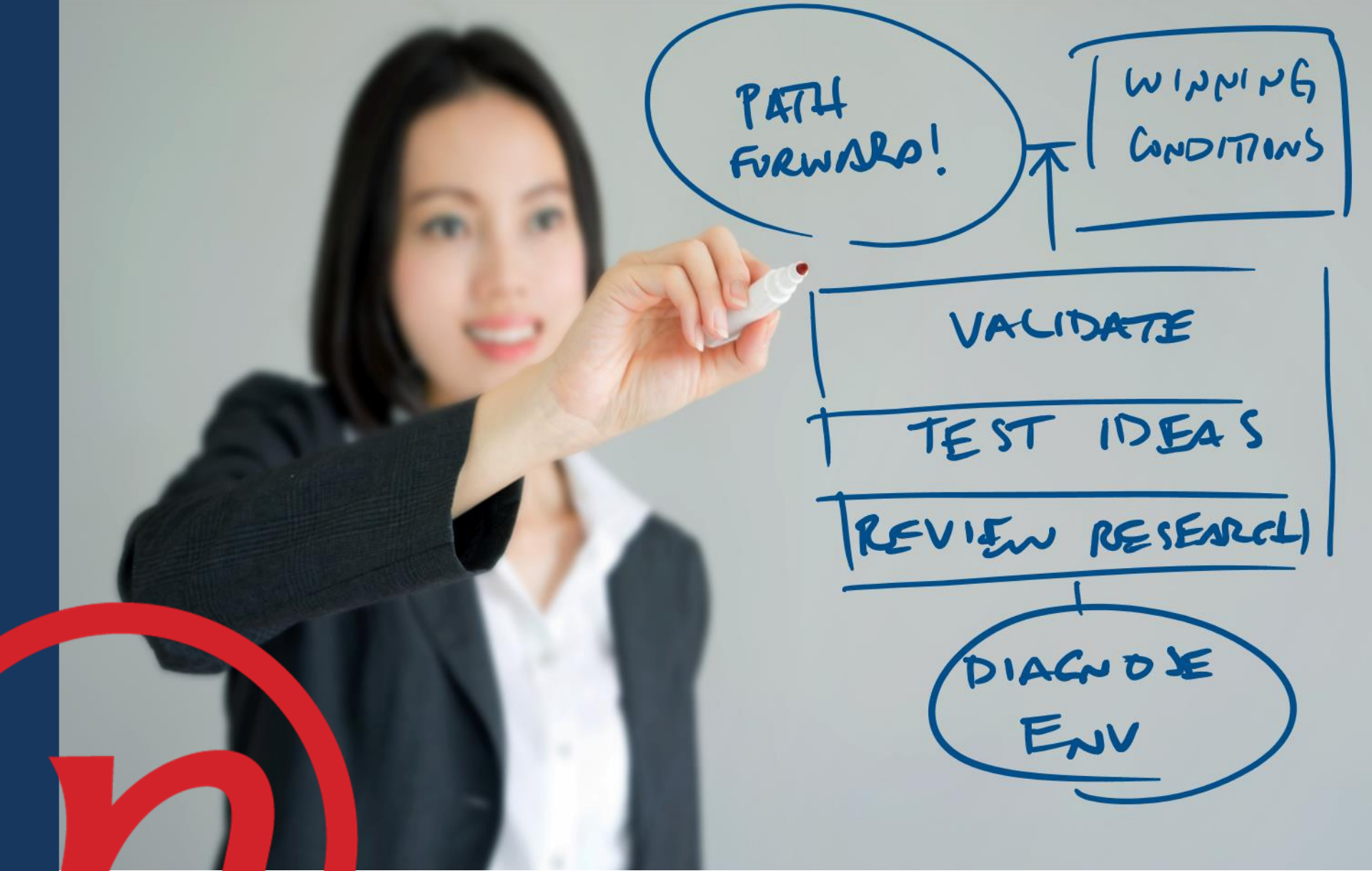


Subgroups	Agree / Somewhat agree
Atlantic (n=100)	85.4%
Quebec (n=250)	77.0%
Ontario (n=300)	83.1%
Prairies (n=200)	78.6%
British Columbia (n=150)	84.2%
Male (n=506)	79.4%
Female (n=494)	82.8%
18 to 34 (n=252)	85.3%
35 to 54 (n=372)	80.7%
55 plus (n=376)	78.5%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with each of the following?

There are medical benefits to marijuana and cannabis consumption



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 6th and 10th, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Business of Cannabis.

Note: Charts may not add up to 100 due to rounding.



About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



View our brochure

Nanos Research

North America Toll-free

1.888.737.5505

info@nanosresearch.com

Technical Note

Element	Description
Organization who commissioned the research	Business of Cannabis
Final Sample Size	1000 Randomly selected individuals.
Margin of Error	±3.1percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct
Number of Calls	Maximum of five call backs.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	December 6 th to 10 th , 2017.
Language of Survey	The survey was conducted in both English and French.

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Estimated Response Rate	Eleven percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	This was module four of an omnibus survey. Preceding modules asked Canadians about their national issue of concern, , as well as social issues; trade agreements; health issues; local news; drug policy and safety; security and the resource sector.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Survey Company	Nanos Research
Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.



Tabulations

Confidential



2017-1111 – Business of Cannabis – Cannabis and Marijuana Perceptions – STAT SHEET

			Region						Gender		Age		
			Canada 2017-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Are you familiar, somewhat familiar, somewhat unfamiliar or unfamiliar with the current plans for the legalization and retail distribution of marijuana in your province?	Total	Unwgt N	1000	100	250	300	200	150	506	494	252	372	376
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Familiar	%	41.6	35.7	40.7	43.6	45.5	37.6	46.4	36.9	46.7	44.6	35.3
	Somewhat familiar	%	45.6	49.7	43.5	47.7	40.3	49.0	41.6	49.4	38.2	43.3	52.7
	Somewhat unfamiliar	%	8.7	6.3	14.3	6.5	6.2	8.6	8.2	9.1	9.3	8.7	8.3
	Unfamiliar	%	3.9	8.4	1.5	1.9	7.0	4.8	3.4	4.4	5.3	3.2	3.5
	Unsure	%	.3	.0	.0	.3	1.0	.0	.4	.2	.4	.2	.2

			Region						Gender		Age		
			Canada 2017-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Do you support, somewhat support, somewhat oppose or oppose the legalization and retail distribution of marijuana in your province?	Total	Unwgt N	1000	100	250	300	200	150	506	494	252	372	376
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	49.3	57.8	44.8	50.9	47.1	51.0	51.9	46.9	68.9	48.7	36.2
	Somewhat support	%	20.9	18.9	20.7	20.5	20.5	23.7	18.9	22.8	13.2	18.9	28.0
	Somewhat oppose	%	8.7	8.7	10.7	5.5	10.4	9.6	7.8	9.6	6.9	6.9	11.7
	Oppose	%	18.6	10.4	21.0	20.3	19.8	15.2	20.0	17.4	9.2	22.1	22.1
	Unsure	%	2.4	4.1	2.8	2.8	2.1	.5	1.5	3.4	1.8	3.4	2.0

Are you comfortable, somewhat comfortable, somewhat uncomfortable, or uncomfortable with the following: [Randomize]

			Region						Gender		Age		
			Canada 2017-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - The amount of public information available on the legalization of marijuana/cannabis	Total	Unwgt N	1000	100	250	300	200	150	506	494	252	372	376
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Comfortable	%	26.5	28.8	29.0	23.0	22.8	32.6	26.3	26.6	37.9	24.7	20.0
	Somewhat comfortable	%	34.7	44.6	35.5	36.1	28.6	31.8	33.9	35.4	31.3	38.3	33.8
	Somewhat uncomfortable	%	17.6	11.7	15.0	19.0	22.5	16.5	19.4	15.9	13.4	16.4	21.6
	Uncomfortable	%	16.7	11.0	15.7	16.8	22.6	13.8	16.3	16.9	12.8	17.0	19.0
	Unsure	%	4.6	4.0	4.8	5.1	3.4	5.3	4.1	5.1	4.5	3.5	5.6

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 6th and 10th, 2017. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

www.nanosresearch.com



2017-1111 – Business of Cannabis – Cannabis and Marijuana Perceptions – STAT SHEET

Are you comfortable, somewhat comfortable, somewhat uncomfortable, or uncomfortable with the following: [Randomize]

			Region					Gender		Age			
			Canada 2017-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Consuming alcohol with your family	Total	Unwgt N	1000	100	250	300	200	150	506	494	252	372	376
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Comfortable	%	61.6	60.7	55.4	70.4	59.4	58.1	63.1	60.3	63.5	59.3	62.4
	Somewhat comfortable	%	22.7	21.7	26.7	19.4	22.6	23.3	20.9	24.4	19.2	25.9	22.3
	Somewhat uncomfortable	%	6.8	6.9	7.3	5.8	9.0	5.2	7.3	6.4	8.3	5.3	7.1
	Uncomfortable	%	7.7	7.2	9.0	4.0	8.5	12.3	7.5	7.9	7.6	8.4	7.1
	Unsure	%	1.1	3.5	1.6	.4	.6	1.1	1.2	1.1	1.4	1.1	1.0

Are you comfortable, somewhat comfortable, somewhat uncomfortable, or uncomfortable with the following:

			Region					Gender		Age			
			Canada 2017-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Consuming cannabis products with your family	Total	Unwgt N	1000	100	250	300	200	150	506	494	252	372	376
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Comfortable	%	13.9	17.8	11.7	15.4	11.1	15.9	14.4	13.4	18.9	11.8	12.4
	Somewhat comfortable	%	15.2	16.9	14.3	13.9	15.7	17.7	14.3	16.2	22.3	11.9	13.3
	Somewhat uncomfortable	%	16.9	21.8	18.9	15.4	18.7	11.2	18.1	15.8	22.7	19.8	10.4
	Uncomfortable	%	48.4	34.2	52.3	49.1	50.4	47.1	48.0	48.8	30.8	53.4	56.3
	Unsure	%	5.5	9.2	2.7	6.2	4.2	8.1	5.3	5.7	5.3	3.2	7.7

Do you agree, somewhat agree, somewhat disagree or disagree with the following? [Randomize]

			Region						Gender		Age		
			Canada 2017-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - The marijuana and cannabis industry is taking sufficient steps to ensure safety and responsible usage	Total	Unwgt N	1000	100	250	300	200	150	506	494	252	372	376
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	16.8	24.4	11.1	14.4	21.0	20.2	17.5	16.1	27.6	16.9	9.2
	Somewhat agree	%	25.4	28.8	27.7	25.9	23.0	21.8	27.3	23.6	31.1	22.8	23.8
	Somewhat disagree	%	16.0	11.3	18.0	14.5	17.5	16.6	15.2	16.8	12.9	18.9	15.5
	Disagree	%	24.2	14.9	25.0	26.1	27.3	21.2	25.6	22.9	14.5	26.1	29.3
	Unsure	%	17.6	20.6	18.2	19.1	11.2	20.2	14.5	20.7	13.9	15.3	22.2

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 6th and 10th, 2017. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

www.nanosresearch.com



2017-1111 – Business of Cannabis – Cannabis and Marijuana Perceptions – STAT SHEET

Do you agree, somewhat agree, somewhat disagree or disagree with the following? [Rotate]

			Region						Gender		Age		
			Canada 2017-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - There are medical benefits to marijuana and cannabis consumption	Total	Unwgt N	1000	100	250	300	200	150	506	494	252	372	376
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	49.3	58.1	42.1	51.9	46.1	54.4	45.6	52.9	57.1	47.4	45.5
	Somewhat agree	%	31.8	27.3	34.9	31.2	32.5	29.8	33.8	29.9	28.2	33.3	33.0
	Somewhat disagree	%	6.9	5.4	9.0	5.0	7.9	7.0	7.2	6.6	5.8	6.9	7.6
	Disagree	%	5.9	6.4	7.6	5.3	7.7	1.5	7.3	4.5	4.3	6.7	6.3
	Unsure	%	6.1	2.8	6.4	6.6	5.8	7.3	6.1	6.1	4.6	5.7	7.6

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 6th and 10th, 2017. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

www.nanosresearch.com