



Ipsos Public Affairs



Global News

Cannabis Omnibus

JENNIFER MCLEOD MACEY, VICE PRESIDENT

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GAME CHANGERS



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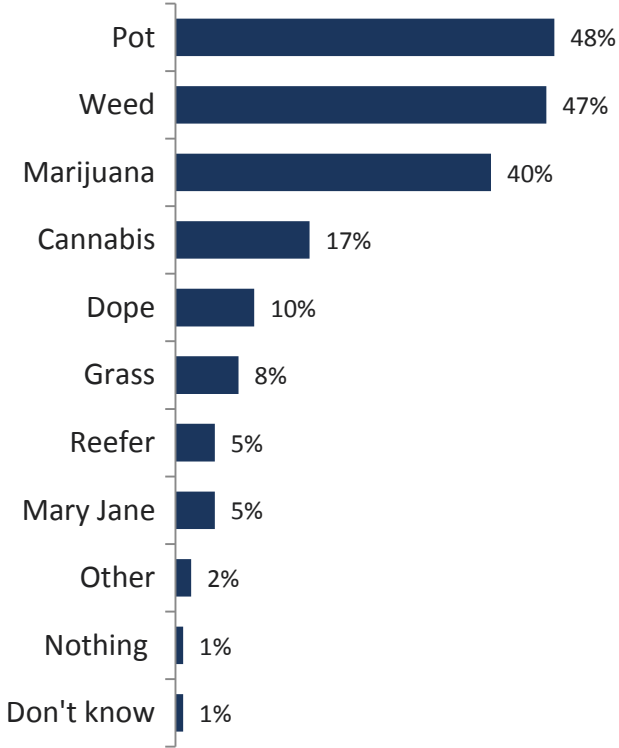
Methodology

- These are findings of an Ipsos poll conducted on behalf of Global News
- For this survey, a sample of 2,000 Canadians from the Ipsos I-Say panel was interviewed from October 5th to 9th 2018
- Quotas and weighting were employed to ensure that the sample's composition reflects the overall population according to census information
- The precision of the online polls is measured using a credibility interval. In this case, the results are accurate to within +/- 2.5 percentage points, 19 times out of 20, of what the results would have been had all Canadian adults been polled.
- Credibility intervals are wider among subsets of the population.

EXAMINING ATTITUDES AND BEHAVIOURS OF CANNABIS USERS

Naming Cannabis

- Canadians most commonly refer to cannabis as “pot” or “weed” when it comes up in conversation, followed by “marijuana”.



Generationally, Naming Cannabis Looks Differently

18-34

35-54

55+

Weed

69% aged 18-34
46% aged 35-54
32% aged 55+

Pot

42% aged 18-34
55% aged 35-54
46% aged 55+

Grass

5% aged 18-34
8% aged 35-54
11% aged 55+

Cannabis

22% aged 18-34
20% aged 35-54
12% aged 55+

Reefer

4% aged 18-34
8% aged 35-54
2% aged 55+

Marijuana

39% aged 18-34
38% aged 35-54
43% aged 55+

Profile of a Cannabis User

CANNABIS USE

21% Of Canadians currently use cannabis



29% 18-24
24% 34-54
14% 55+

| REGION | | | | | |
|--------|-----|-------|---------|--------|----------|
| BC | AB | SK/MB | Ontario | Quebec | Atlantic |
| 19% | 23% | 22% | 24% | 17% | 22% |

FREQUENCY OF CANNABIS USE

72% of cannabis usage is regular.

Daily usage **43%**

Once a week or more **29%**

CANNABIS, ALCOHOL AND CIGARETTES

Cannabis users are more likely to be currently using alcohol and cigarettes compared to lapsed or non-users

| | Yes | Lapsed | No |
|------------|-----|--------|-----|
| Alcohol | 65% | 58% | 56% |
| Cigarettes | 51% | 35% | 15% |

TYPE OF CANNABIS USE

Cannabis users mostly describe the purpose of their usage both medical and recreational

- 48%** • Both medical and recreational/social
- 36%** • Recreational/social
- 15%** • Medical

IMPACT OF USAGE AFTER LEGALIZATION

Once recreational marijuana is legalized, most say that their frequency of usage will remain about the same.

- 84%** • About the same
- 13%** • More
- 1%** • Less

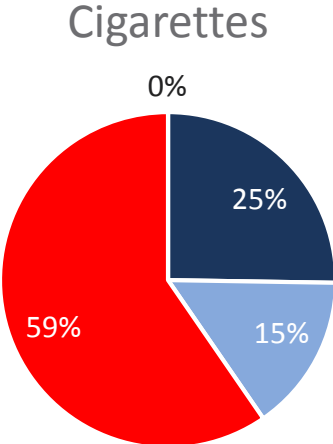
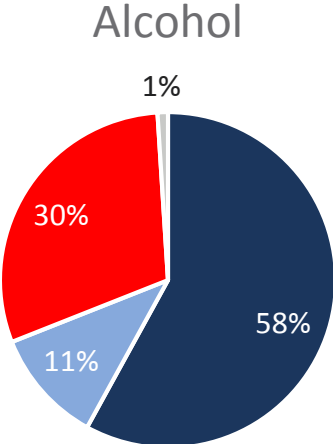
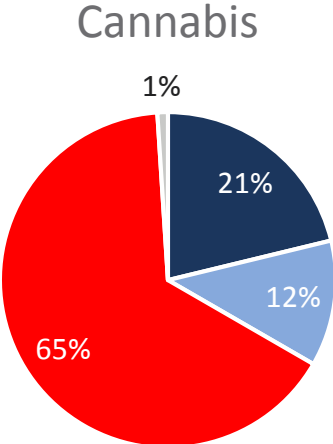
LIKELIHOOD OF USING AFTER LEGALIZED

Of the **79%** of respondents who said they are currently not using cannabis, once it is legalized most say they will continue to not use it.

- 11%** Very/somewhat likely
- 88%** Not very/not at all likely

Current Usage of Cannabis, Alcohol and Cigarettes

- Two in 10 Canadians say they use cannabis, with about 1 in 10 saying they use to. This is less than both alcohol and cigarettes.



■ Yes ■ No, but I used to
■ No ■ Prefer not to say

Current Usage of Cannabis, Alcohol and Cigarettes

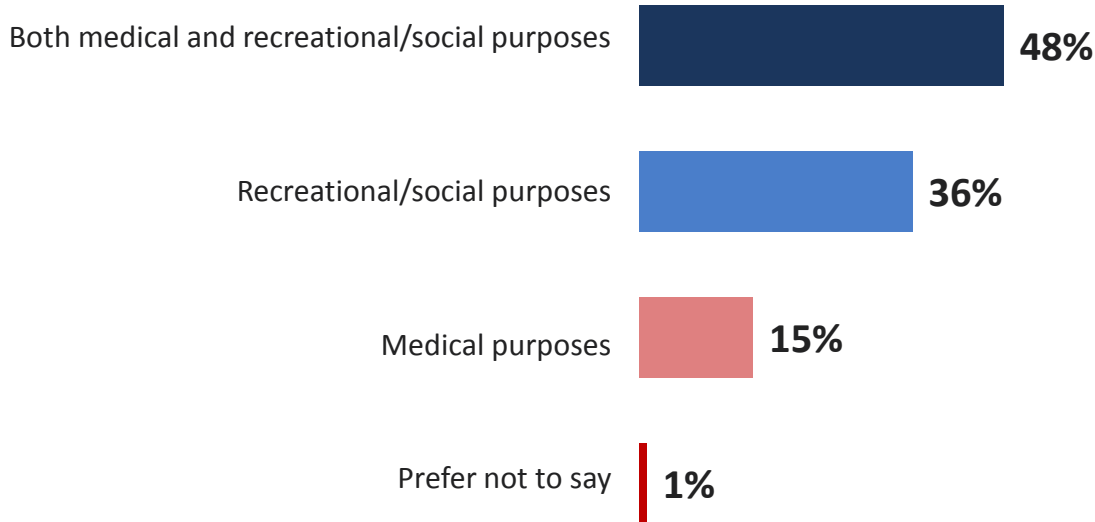
- Cannabis usage tends to skew younger, male and residing in Ontario.
- Respondents who are currently using cannabis are also more likely to say they currently use alcohol and cigarettes compared to lapsed or non-users of cannabis.

| %Yes | Total | Gender | | AGE | | | REGION | | | | | |
|-------------|---------------|--------------|---------------|--------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | | Male | Female | 18-34 | 35-54 | 55+ | BC | AB | SK/MB | Ontario | Quebec | Atlantic |
| | | A | B | C | D | E | A | B | C | D | E | F |
| Base | n=2000 | n=969 | n=1031 | n=542 | n=769 | n=689 | n=241 | n=200 | n=200 | n=700 | n=459 | n=200 |
| Cannabis | 21% | 24% B | 19% | 29% E | 24% E | 14% | 19% | 23% | 22% | 24% E | 17% | 22% |
| Alcohol | 58% | 61% B | 55% | 56% | 58% | 59% | 59% | 62% | 59% | 56% | 59% | 54% |
| Cigarettes | 25% | 24% | 27% | 21% | 31% CE | 24% | 17% | 24% | 26% A | 28% A | 27% A | 24% |

| %Yes | Total | Cannabis usage | | | Cannabis purpose | | |
|-------------|---------------|----------------|--------------|---------------|------------------|--------------|--------------|
| | | Yes | Lapsed | No | Medical purposes | Recreational | Both |
| | | M | N | O | P | Q | R |
| Base | n=2000 | n=402 | n=233 | n=1338 | n=69 | n=144 | n=186 |
| Alcohol | 58% | 65% O | 58% | 56% | 53% | 70% P | 65% |
| Cigarettes | 25% | 51% NO | 35% O | 15% | 39% | 56% P | 51% |

Purpose of Use

- Among cannabis users, almost half say they use it for both medical and recreational/social purposes, with a little over a third just using it for recreational/social purposes.



Purpose of Use

- Casual cannabis users are more likely to describe their usage as recreational/social purposes, while regular cannabis users are more likely to say they use cannabis for medical purposes. Regionally, Quebecers are most likely to describe the purpose of their usage as recreational/social, while Albertans, British Columbians and residents of SK/MB are more likely to say they use for medical purpose.

| | Total | REGION | | | | | | Cannabis frequency | |
|---|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------------|--------------|
| | | BC | AB | SK/MB | Ontario | Quebec | Atlantic | Regular | Casual |
| | | A | B | C | D | E | F | S | T |
| Base | n=402 | n=48 | n=41 | n=39 | n=153 | n=78 | n=43 | n=293 | n=102 |
| Both medical and recreational/social purposes | 48% | 36% | 50% | 47% | 53% | 39% | 54% | 51% | 40% |
| Recreational/social purposes | 36% | 39% | 27% | 28% | 32% | 54% BCDF | 28% | 29% | 53% S |
| Medical purposes | 15% | 21% E | 23% E | 26% E | 14% | 7% | 18% | 19% T | 6% |
| Prefer not to say | 1% | 4% | - | - | 1% | 1% | - | - | 2% |

Frequency of Use (Among those who use)

- The majority of cannabis users use it at least weekly, with over 4 in 10 saying daily and 3 in 10 saying once a week or more.



Among users, the % who consume every day...

GENDER



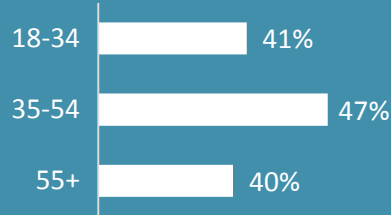
43%

Male

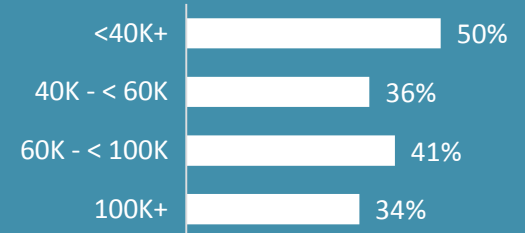
43%

Female

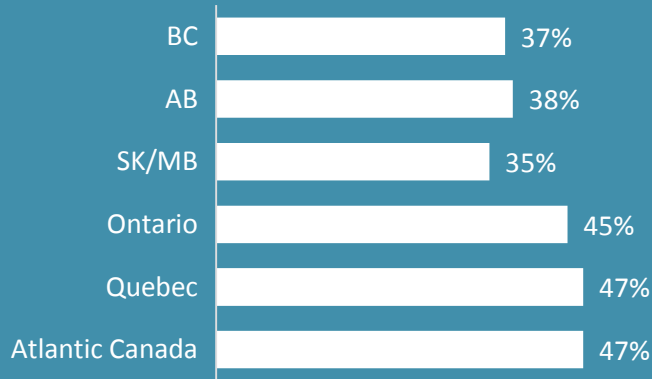
AGE



INCOME



REGION



CHILDREN <18 YRS IN HHLD

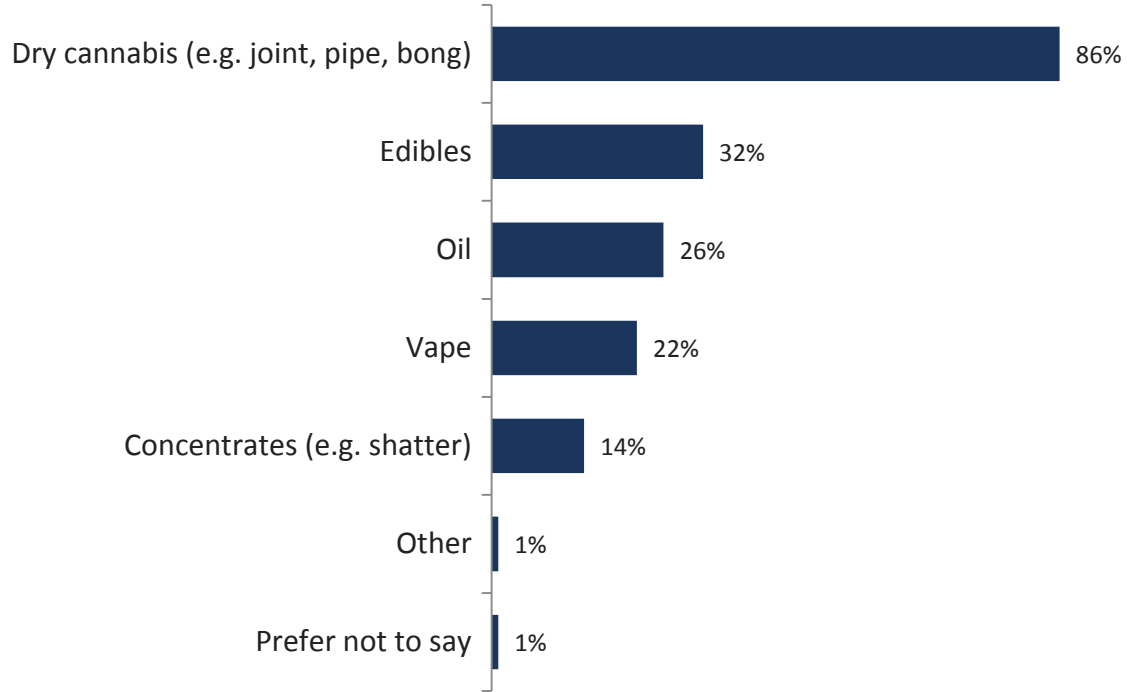


46%
Children

42%
No Children

Form of Cannabis Consumption (Among those who use)

- In terms of what forms of Cannabis people use, the most common is dry cannabis (e.g. joint, pipe, bong), with almost 9 in 10 saying these use this. Edibles, oil and vape are also commonly used, although to a lesser extent than dry cannabis.



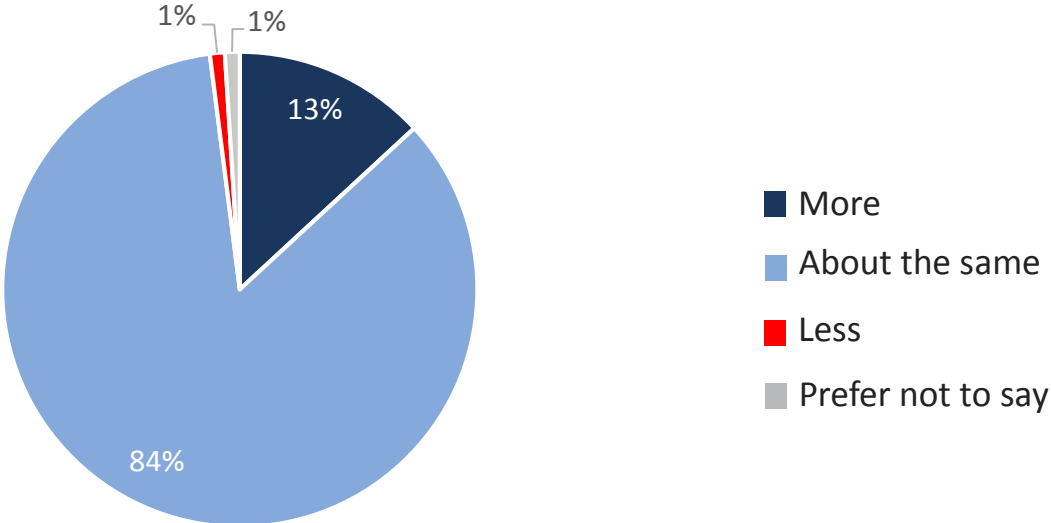
Form of Cannabis Consumption (Among those who use)

- Respondents who indicate they use cannabis for recreational purposes are more likely to use dry forms of cannabis (e.g. joint, pipe, bong), while respondents who describe themselves as medical cannabis users are more likely to use edibles, oil and vape.

| | Total | Cannabis purpose | | |
|---------------------------------------|--------------|------------------|--------------|--------------|
| | | Medical purposes | Recreational | Both |
| | | P | Q | R |
| Base | n=402 | n=69 | n=144 | n=186 |
| Dry cannabis (e.g. joint, pipe, bong) | 86% | 48% | 96% P | 91% P |
| Edibles | 32% | 33% Q | 19% | 40% |
| Oil | 26% | 46% Q | 11% | 31% Q |
| Vape | 22% | 33% Q | 18% | 21% |
| Concentrates (e.g. shatter) | 14% | 16% | 7% | 19% Q |
| Other | 1% | - | 1% | 1% |
| Prefer not to say | 1% | - | - | 1% |

Impact of Legalization on Consumption

- The majority of cannabis users indicate that legalization won't change their consumption of cannabis, while just over 1 in 10 say they'll consume more.



Impact of Legalization on Consumption

- For younger cannabis users aged 18-34 the legalization of recreational marijuana will most likely increase their consumption, while their older counterparts say their consumption user will remain about the same. Across the country, Ontarian cannabis users are most likely to say their consumption will increase, while Quebecers are most likely to say their consumption will stay about the same

| | Total | Gender | | AGE | | | REGION | | | | | | Cannabis frequency | |
|----------------------|--------------|--------------|--------------|---------------|--------------|--------------|-------------|-------------|---------------|---------------|---------------|-------------|--------------------|--------------|
| | | Male | Female | 18-34 | 35-54 | 55+ | BC | AB | SK/MB | Ontario | Quebec | Atlantic | Regular | Casual |
| | | A | B | C | D | E | A | B | C | D | E | F | S | T |
| Base | n=402 | n=225 | n=177 | n=150 | n=163 | n=89 | n=48 | n=41 | n=39 | n=153 | n=78 | n=43 | n=293 | n=102 |
| More | 13% | 16% | 10% | 23% DE | 7% | 9% | 3% | 12% | 19% AE | 20% AE | 4% | 8% | 10% | 24% S |
| About the same | 84% | 82% | 87% | 74% | 91% C | 89% C | 89% | 83% | 81% | 78% | 95% CD | 92% | 89% T | 73% |
| Less | 1% | - | 2% | 1% | 1% | 2% | 4% | 4% | - | 1% | - | - | 1% | 1% |
| Prefer Not to answer | 1% | 1% | 1% | 3% | - | - | 4% | - | - | 1% | 1% | - | - | 2% |

Purchasing Cannabis From Same Place as Now?

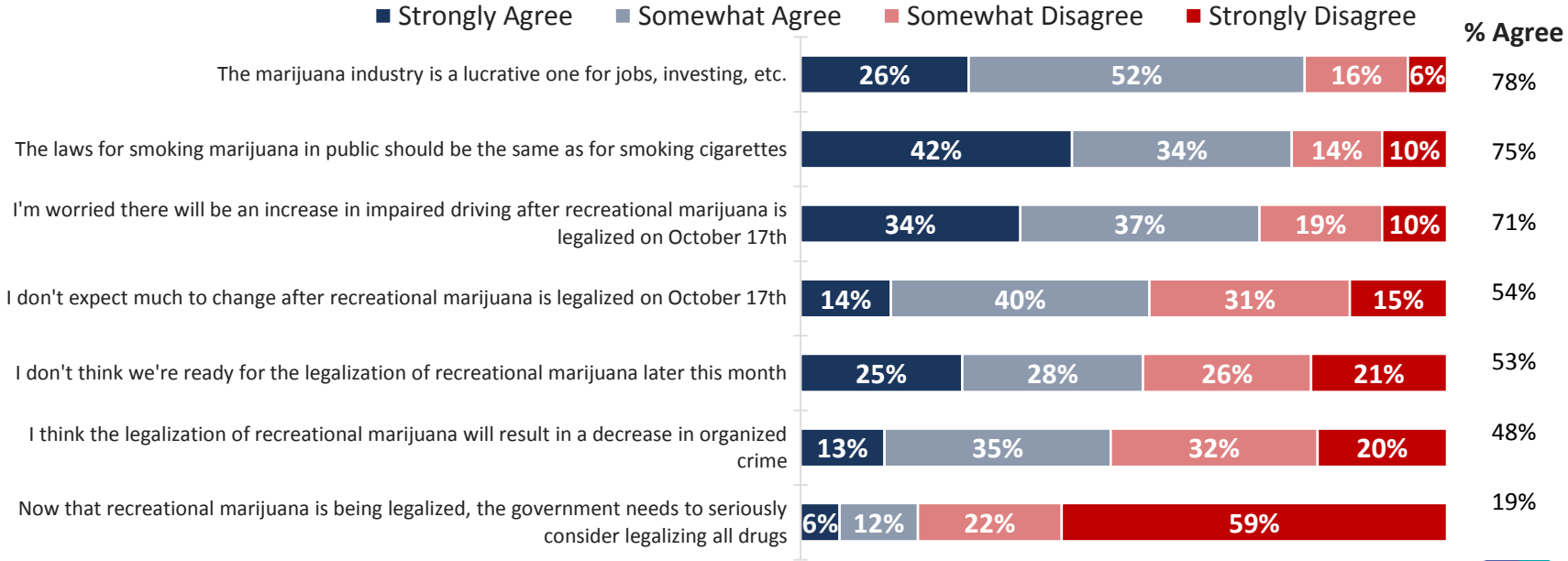
- In terms of where they'll purchase cannabis after legalization, 4 in 10 say it depends on the price, with over a third saying yes, they will continue to get it from the same place.



EXPECTED CHANGES AFTER LEGALIZATION

Views on Legalized Cannabis

- While 8 in 10 Canadians believe the marijuana industry is lucrative for jobs, investing, etc. there are concerns over legalization, specifically an increase in impaired driving with 7 in 10 agreeing they are concerned. Canadians are also divided on whether we're ready for legalization and whether it will reduce organized crime. Three-quarters believe the laws for smoking marijuana in public should be the same as cigarettes. Only a minority think the government should start seriously considering legalizing all drugs, with 6 in 10 strongly disagreeing.



Views on Legalized Cannabis

- Women, Quebecers and Older Canadians aged 35-54 and 55+ are more likely to believe that we are not ready for the legalization of recreational marijuana later this month.

| %Agree | REGION | | | | | | | | | | | |
|---|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| | Total | Gender | | AGE | | | REGION | | | | | |
| | | A | B | C | D | E | A | B | C | D | E | F |
| Base | n=varies | n=varies | n=varies | n=varies | n=varies | n=varies | n=varies | n=varies | n=varies | n=varies | n=varies | n=varies |
| The marijuana industry is a lucrative one for jobs, investing, etc. | 78% | 79% | 76% | 79% | 78% | 77% | 80% | 75% | 78% | 78% | 77% | 82% |
| The laws for smoking marijuana in public should be the same as for smoking cigarettes | 75% | 77% B | 73% | 74% | 73% | 78% | 76% | 78% | 71% | 75% | 77% | 72% |
| I'm worried there will be an increase in impaired driving after recreational marijuana is legalized on October 17th | 71% | 71% | 71% | 70% | 67% | 75% CD | 67% | 69% | 65% | 73% | 74% C | 70% |
| I don't expect much to change after recreational marijuana is legalized on October 17th | 54% | 57% B | 51% | 57% | 54% | 51% | 58% | 49% | 49% | 53% | 56% | 54% |
| I don't think we're ready for the legalization of recreational marijuana later this month | 53% | 51% | 56% A | 46% | 54% C | 58% C | 49% | 58% | 50% | 50% | 60% ACD | 51% |
| I think the legalization of recreational marijuana will result in a decrease in organized crime | 48% | 53% B | 44% | 62% DE | 48% E | 39% | 51% | 42% | 45% | 53% BEF | 45% | 42% |
| Now that recreational marijuana is being legalized, the government needs to seriously consider legalizing all drugs | 19% | 23% B | 15% | 27% DE | 18% E | 13% | 18% | 14% | 13% | 22% BCF | 20% CF | 12% |

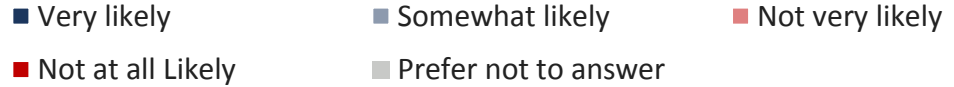
Views on Legalized Cannabis

- Perhaps unsurprising, cannabis users are more likely to agree with the statements that have a positive connotation toward the legalization of cannabis compared to lapsed and non-users.

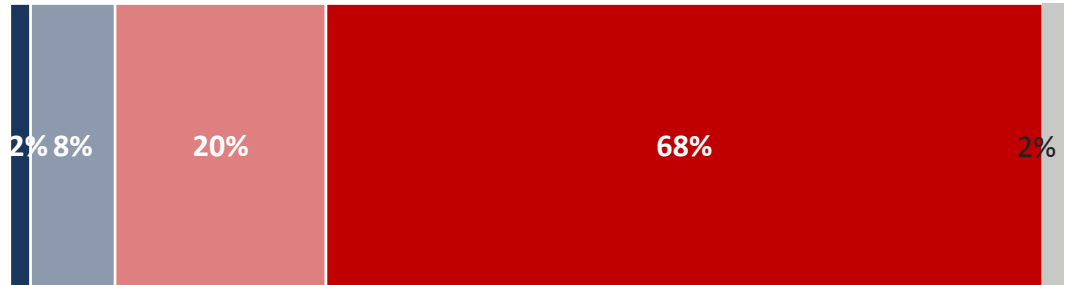
| %Agree | Cannabis usage | | | |
|---|-----------------|-----------------|-----------------|-----------------|
| | Total | Yes | Lapsed | No |
| | | M | N | O |
| Base | n=varies | n=varies | n=varies | n=varies |
| The marijuana industry is a lucrative one for jobs, investing, etc. | 78% | 92% O | 89% O | 71% |
| The laws for smoking marijuana in public should be the same as for smoking cigarettes | 75% | 83% O | 78% | 72% |
| I'm worried there will be an increase in impaired driving after recreational marijuana is legalized on October 17th | 71% | 45% | 63% M | 81% MN |
| I don't expect much to change after recreational marijuana is legalized on October 17th | 54% | 70% O | 67% O | 46% |
| I don't think we're ready for the legalization of recreational marijuana later this month | 53% | 24% | 37% M | 66% MN |
| I think the legalization of recreational marijuana will result in a decrease in organized crime | 48% | 72% NO | 60% O | 38% |
| Now that recreational marijuana is being legalized, the government needs to seriously consider legalizing all drugs | 19% | 25% NO | 15% | 17% |

New Recreational Users

- Among non-users of cannabis, only a minority (10%) say they are very or somewhat likely to start using recreational cannabis after it's legalized, with nearly 7 in 10 saying they are not at all likely and 2 in 10 who say they're not very likely.



How likely are you to start using recreational marijuana after it's legalized on October 17th?



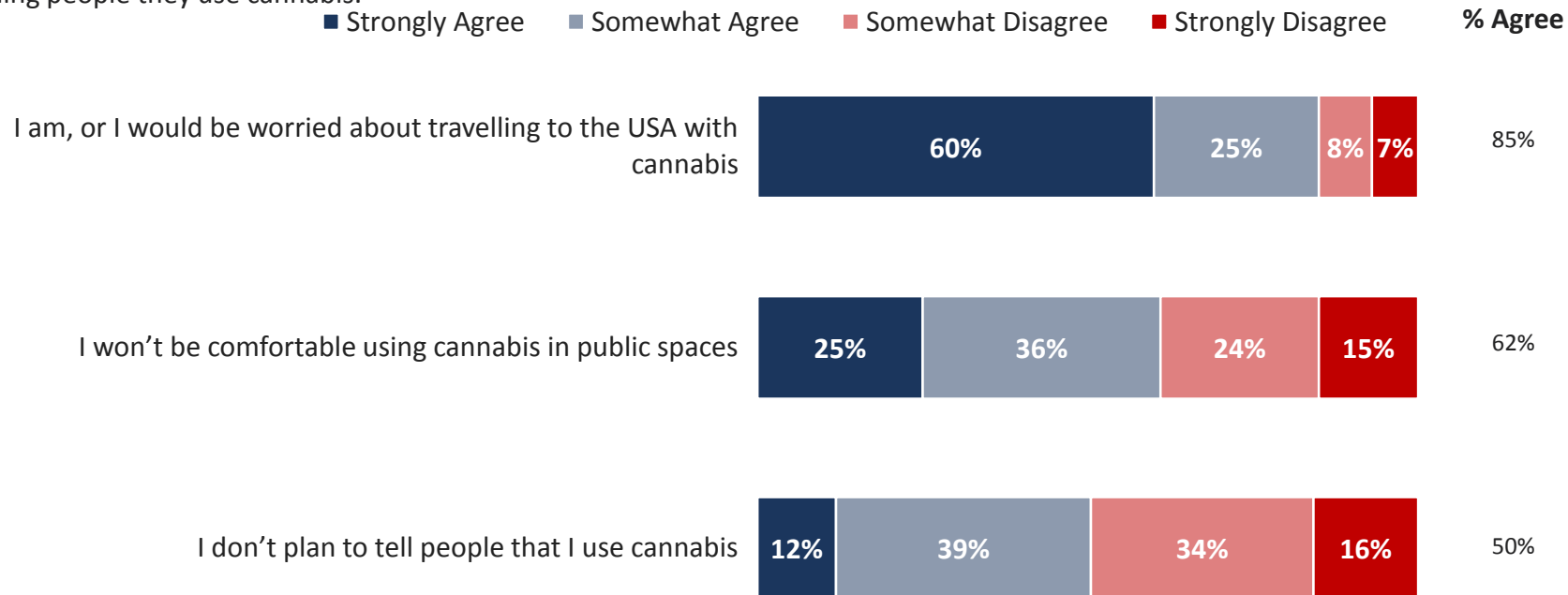
New Recreational Users

- Once recreational marijuana is legalized on October 17th, younger non-cannabis users aged 18-34 are more likely to say they are likely to start using recreational marijuana, while their older counterparts regardless of the legalization will likely continue to be non-users. One in three lapsed users might take it up again, but only 6% of those who have never used cannabis will try it.

| | Total | AGE | | | REGION | | | | | | Cannabis usage | | |
|----------------|---------------|---------------|--------------|--------------|--------------|--------------|--------------|---------------|--------------|--------------|----------------|--------------|---------------|
| | | 18-34 | 35-54 | 55+ | BC | AB | SK/MB | Ontario | Quebec | Atlantic | Yes | Lapsed | No |
| | | C | D | E | A | B | C | D | E | F | M | N | O |
| Base | n=1598 | n=392 | n=606 | n=600 | n=193 | n=159 | n=161 | n=547 | n=381 | n=157 | - | n=233 | n=1338 |
| Likely (T2B) | 11% | 18% DE | 10% | 7% | 7% | 9% | 11% | 14% AE | 8% | 10% | - | 31% O | 6% |
| Unlikely (B2B) | 88% | 80% | 88% C | 92% C | 91% | 90% | 85% | 84% | 90% D | 90% | - | 67% | 93% N |

Concerns About Cannabis

- Among cannabis users or those likely to start, there is a high degree of concern over travelling to the USA with Cannabis. Additionally, 6 in 10 say they wouldn't be comfortable using cannabis in public spaces and half indicate that they don't plan on telling people they use cannabis.



Concerns About Cannabis

- Among cannabis users or those likely to start, women, Atlantic Canadians, medical marijuana users and those aged 18-34 are more likely to say that even after the legalization of marijuana they won't be comfortable using cannabis in public spaces.

| %Agree | Gender | | AGE | | | REGION | | | | | | Cannabis purpose | | | |
|---|--------|-------|--------|-------|-------|--------|------|------|-------|---------|--------|------------------|------------------|--------------|-------|
| | Total | Male | Female | 18-34 | 35-54 | 55+ | BC | AB | SK/MB | Ontario | Quebec | Atlantic | Medical purposes | Recreational | Both |
| | | A | B | C | D | E | A | B | C | D | E | F | P | Q | R |
| Base | n=569 | n=303 | n=266 | n=217 | n=218 | n=134 | n=61 | n=57 | n=59 | n=227 | n=106 | n=59 | n=69 | n=144 | n=186 |
| I am, or I would be worried about travelling to the USA with cannabis | 85% | 87% | 82% | 84% | 82% | 91% | 81% | 78% | 87% | 87% | 87% | 82% | 88% | 81% | 85% |
| I won't be comfortable using cannabis in public spaces | 62% | 57% | 67% A | 68% D | 54% | 63% | 59% | 58% | 56% | 64% | 56% | 75% E | 69% R | 58% | 52% |
| I don't plan to tell people that I use cannabis | 50% | 49% | 51% | 48% | 52% | 51% | 52% | 53% | 39% | 48% | 58% C | 46% | 57% | 50% | 45% |

A PARENT'S PERSPECTIVE

Parents Who Use Cannabis

CANNABIS USE



26%

Of parents say they currently use cannabis

TYPE OF CANNABIS USE

Most parents who use cannabis describe their usage both medical and recreational

- 54% • Both medical and recreational/social
- 29% • Recreational/social
- 17% • Medical

FREQUENCY OF CANNABIS USE

80% of parents who use cannabis do so on a regular basis

Daily usage 46%

Once a week or more 33%

TOP-3 FORMS OF CANNABIS USE

Dry cannabis is the most popular form of usage, followed by edibles and oils.

- 85% • Dry cannabis
- 35% • Edibles
- 31% • Oils

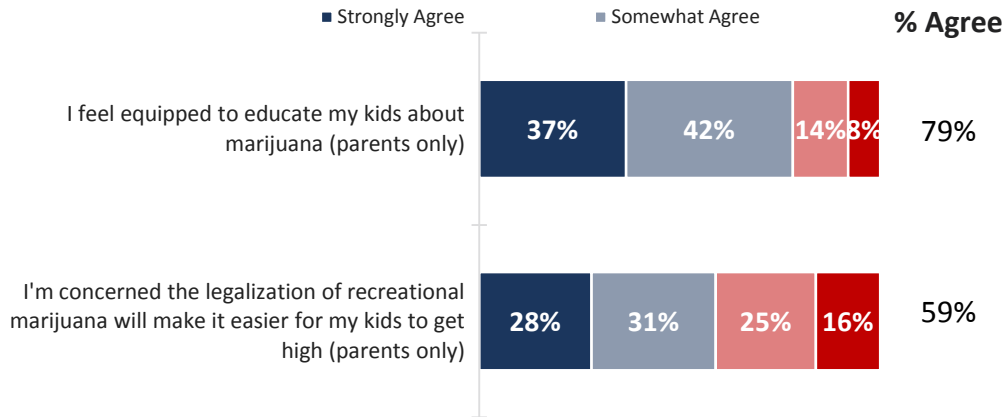
IMPACT OF USAGE AFTER LEGALIZATION

Once recreational marijuana is legalized, most parents say that their frequency of usage will remain about the same.

- 86% • About the same
- 13% • More
- 1% • Less

Views on Legalized Cannabis

- While 8 in 10 parents believe they are equipped to educate their kids about marijuana, 6 in 10 are concerned that legalization will make it easier for their kids to get high.
- Interestingly, parents who use cannabis are more likely to feel equipped to educate their children, while non-users of cannabis are more likely to express concern that legalization will make it easier for their children to get high.

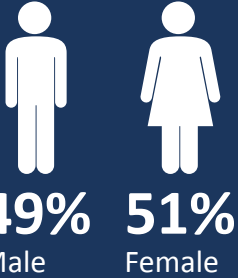


| %Agree | Total | Cannabis usage | | |
|--|-------|----------------|--------|---------------|
| | | Yes | Lapsed | No |
| | M | N | O | |
| I feel equipped to educate my kids about marijuana | 79% | 89% O | 86% | 72% |
| I'm concerned the legalization of recreational marijuana will make it easier for my kids to get high | 59% | 37% | 50% | 69% MN |

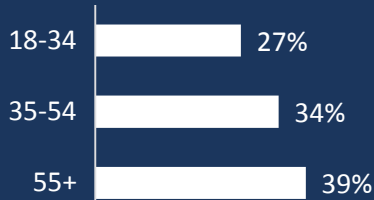
DEMOGRAPHICS

Demographics

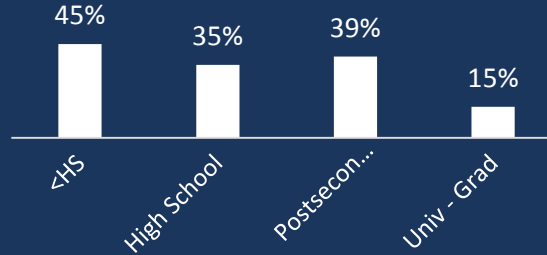
GENDER



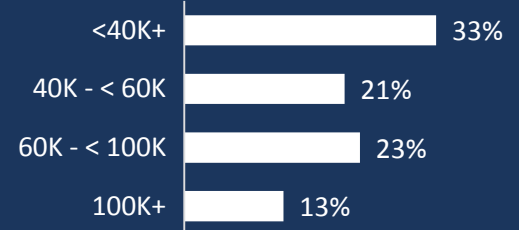
AGE



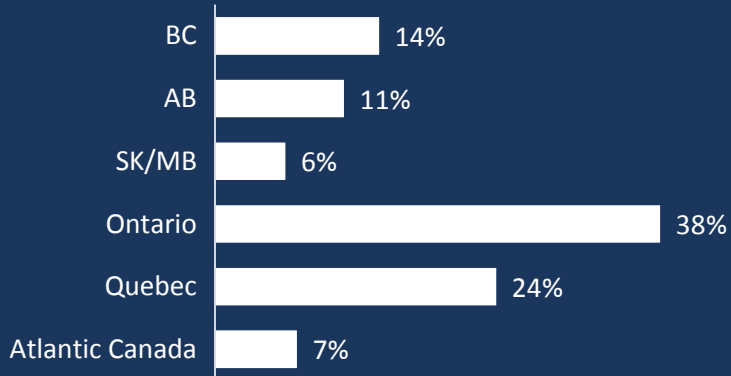
EDUCATION



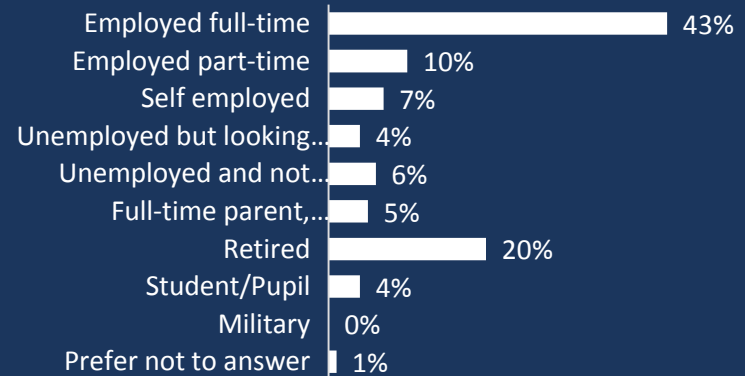
INCOME



REGION

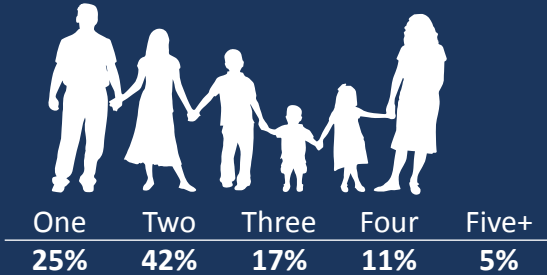


EMPLOYMENT

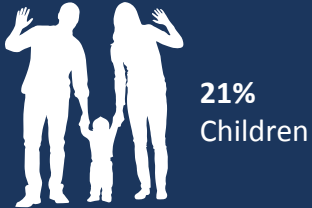


Demographics

HOUSEHOLD SIZE



CHILDREN <18 YRS IN HHLD



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GAME CHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

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Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

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