

CANADIAN CANNABIS REPORT: *WHAT'S THE BUZZ?* **REPORT OVERVIEW**



PRESENTED BY

 oraclepoll & Colin Firth
RESEARCH

September 2017

THE REPORT

The Canadian Cannabis Report: *What's the Buzz?* (CCR) is the most comprehensive and detailed nation-wide scientific market study of the Canadian consumers' views of the current medical marijuana market and the upcoming legalized, recreational market performed to date. **This groundbreaking report provides you with the information you need to know to plan for the evolving road ahead.** The CCR was created for industry stakeholders in the private and public sector to provide a snapshot into the views and expectations of Canadian consumers towards the evolving cannabis revolution. Specifically, the CCR is tailored towards providing valuable insight to those in the following cannabis-related sectors:

- ACMPR Licensed Producers
- ACMPR Applicants
- Government Agencies
- Healthcare Professionals
- Law Enforcement Agencies
- Industry Suppliers
- Financial, Legal & Professional Services

THE PRODUCERS

The Canadian Cannabis Report: *What's the Buzz?* was created by Oraclepoll Research Limited and Cannabis Industry Consultant and Project Manger Colin Firth. Oraclepoll Research Ltd. is one of Canada's leading market research firms with over 22 years of experience performing a wide variety of market research for private sector, political, governmental and not-for-profit organizations in Canada and the United States.

The Canadian Cannabis Report: *What's the Buzz?* was produced in partnership with Colin Firth, a media and marketing entrepreneur with over 30 years of experience in the marketing, corporate communications and publishing sectors in Canada and the United States.

Spanning 59 pages in length, the following is the table of contents from the CCR to show its broad range of categories.

TABLE OF CONTENTS

| | |
|-----------------------------|----|
| EXECUTIVE OVERVIEW | 4 |
| METHODOLOGY & LOGISTICS | 7 |
| RESPONDENT COMPOSITION | 9 |
| LEGALIZATION & SUPPORT | 11 |
| PUBLIC PERCEPTION | 18 |
| PRODUCT KNOWLEDGE | 25 |
| CONSUMPTION | 27 |
| AVAILABILITY | 41 |
| THE BUSINESS OF CANNABIS | 47 |
| LEGAL CONSIDERATIONS | 50 |
| LICENSED PRODUCER DIRECTORY | 53 |

RESPONDANT INFORMATION

SAMPLE SIZE

- The reports and database provided represent the findings from a telephone survey of N=5000 Canadian residents, 18 years of age and older.
- The purpose of the survey was to assess attitudes and opinions of Canadians on a wide range of issues related to Cannabis.
- A total of N=5000 interviews were conducted using person to person telephone interviewing. The margin of error for the total N=5000 sample is $\pm 1.4\%$, 19 times out of 20.



REGIONAL SAMPLE SIZE & MARGIN OF ERROR

| ALBERTA | BRITISH COLUMBIA | MANITOBA | MARITIMES | ONTARIO | SASKATCHEWAN | QUEBEC |
|-------------|------------------|-------------|-------------|-------------|--------------|-------------|
| 550 | 650 | 190 | 350 | 1920 | 140 | 1200 |
| $\pm 4.2\%$ | $\pm 3.8\%$ | $\pm 7.0\%$ | $\pm 5.2\%$ | $\pm 2.2\%$ | $\pm 8.3\%$ | $\pm 2.8\%$ |

SURVEY METHOD

All surveys were conducted by telephone using live operators at the Oraclepoll Research call centre. The survey was conducted using person to person interviewing with computer-assisted techniques of telephone (CATI) and random number selection. The sample frame was inclusive of private numbers as well as cell phone only households. A total of 20% of all interviews were monitored and the management of Oraclepoll Research Limited supervised every interview.

LOGISTICS

Surveys were conducted between the days of July 7 and August 4, 2017. Initial calls were made between the hours of 6:00 p.m. and 9:00 p.m. within each time zone. Subsequent call-backs of unanswered calls and busy numbers were made on a, staggered, daily, rotating basis up to 5 times (from 10:00 a.m. to 9:00 p.m.) until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact. If no contact was made at a number after the fifth attempt, the number was discarded and a new one supplanted it.

EXCERPTS

The following are actual results from the Canadian Cannabis Report.

57%

of Canadians surveyed support the Federal Government's decision to legalize cannabis.

53%

of Canadians surveyed have a positive opinion of Medical Marijuana.

26%

of Canadians surveyed currently consume cannabis products. This equates to **7.67 million** current Cannabis consumers in Canada.

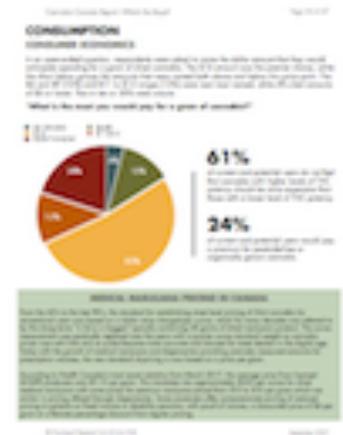
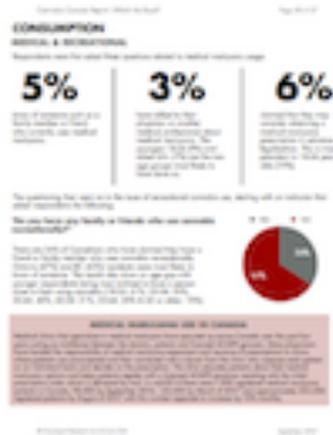
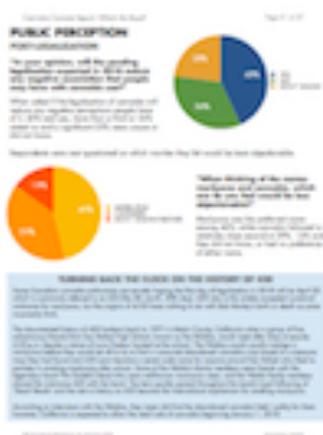
39%

of Canadians surveyed – **potentially 11.42 million Canadians** – will consume cannabis products once legalized.

63%

of current and potential cannabis consumers would prefer to purchase cannabis products in a retail environment, and 65% of all respondents believe licensed growers should be allowed to open their own retail stores to the public once legalized.

The following are examples of the format and layout of the Canadian Cannabis Report.



TERMS OF USE & PURCHASING INFORMATION

The Canadian Cannabis Report: *What's the Buzz?* (the "Report") is copyrighted by Oraclepoll Research Ltd. and Colin Firth (the "Owners"). The Report cannot be modified, reproduced, rebroadcast, shared or used in presentations, public or private, without the expressed written consent of the Owners.

The Report may only be circulated for internal use within the Purchaser's Corporation or Organization as identified and defined by the Purchaser to the Owners in the Purchaser's confirmed sales agreement with the Owners.

All sales of the Report are final. The Confidential nature of the report, and the subsequent transaction between the Purchaser and the Owner do not allow for a 'return' of the Report once delivered to the Purchaser.

PURCHASING INFORMATION

Upon confirmation of receipt of payment by the Owner from the Purchaser, the report will be sent in a digital form to a specified email address provided by the Purchaser. The desired email address for the Purchaser shall be provided to the Owners on an Agreement of Purchase and Sale which will be provided at the time of the transaction. Payment and billing information, contact information and other applicable information relating to the transaction will be entered on this document. Within 24 hours of receipt of the Report, the Purchaser is required to confirm receipt of the Report to the Owners.

The purchase price for the Canadian Cannabis Report: *What's The Buzz?* is:

\$4,950 CAD + HST.

For further information or to purchase the Canadian Cannabis Report: *What's the Buzz?*, please contact Project Manager Colin Firth at colin@oraclepoll.com

"The Canadian Cannabis Report: *What's The Buzz?* is the most detailed and comprehensive market research study that the Cannabis Canada Association has seen on Canada's emerging cannabis industry, and it is a valuable research document for planning ahead post-legalization."

– Colette Rivet, Executive Director, Cannabis Canada Association