

# Higher Ground

Insights from Canada's  
Most Comprehensive Consumer  
Cannabis Study



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# National Headlines

“Shopify plots online cannabis-sales domination after Canada's debut”

BNN Bloomberg

“Molson Coors readying cannabis-infused beverages to sell next year”

Financial Post

“Medical cannabis users anxious over supply shortages”

CBC

“What Canada’s doctors are concerned about with marijuana legalization”

The Globe and Mail

“It's crazy!': Quebec's ban on sales of anything with words or images of pot riles business owners”

CBC

“Canadian entrepreneurs cooking up edible pot products despite legalization delay”

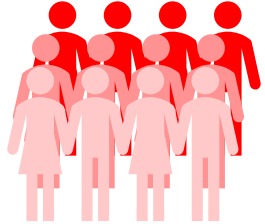
The Globe and Mail

“Entrepreneur  
sells do-it-yourself  
cannabis edible  
kits to bypass legal  
limitations”

StarMetro



# Who We Are:



**40,000+**

Canadians Surveyed Annually

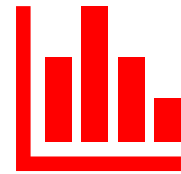
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**40+**

Urban Canadian Markets

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**60,000+**

Variables

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**500+**

Consumer Products and Brands

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**300+**

Media Brands for All Media

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**170+**

Psychographics

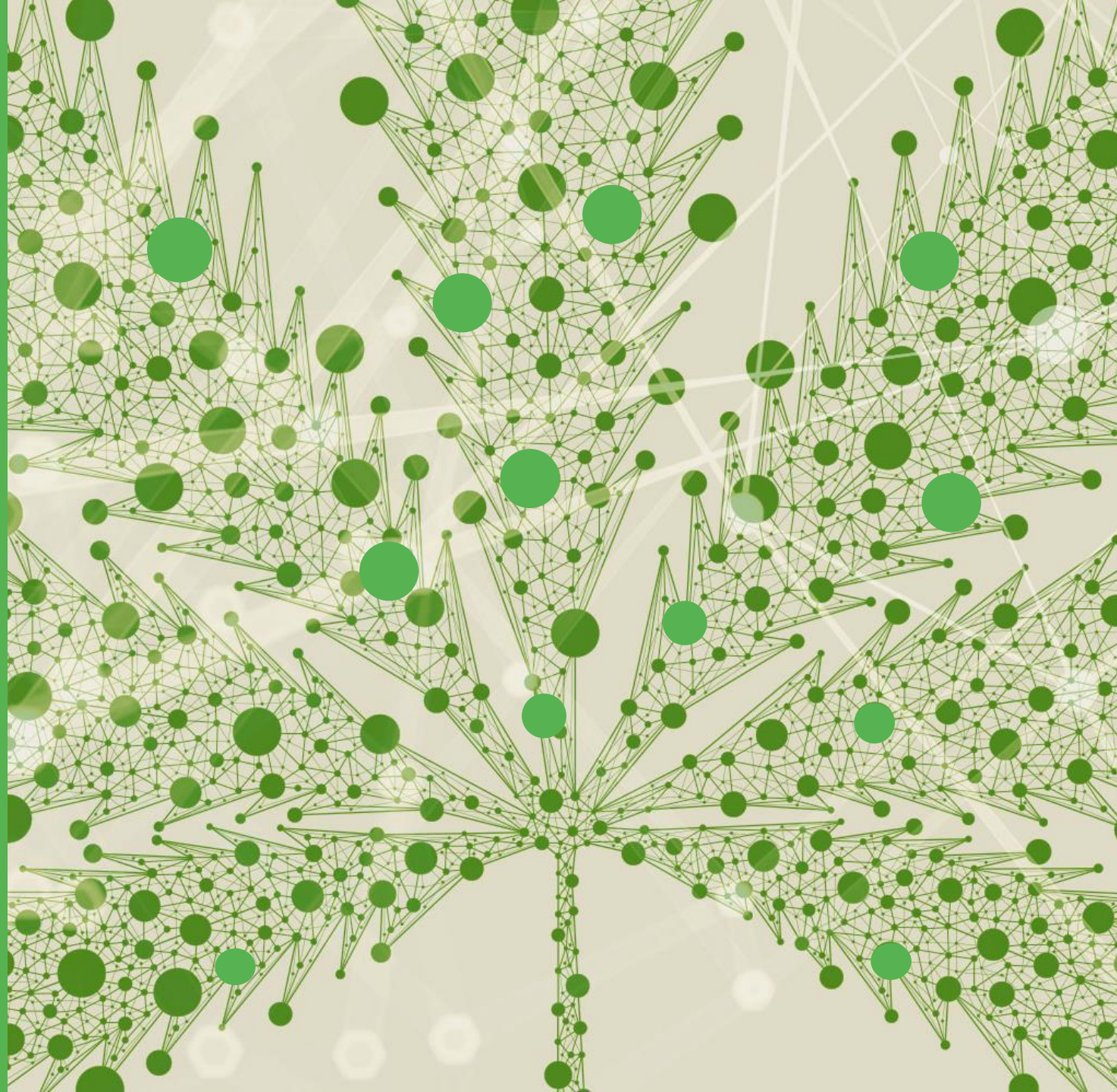
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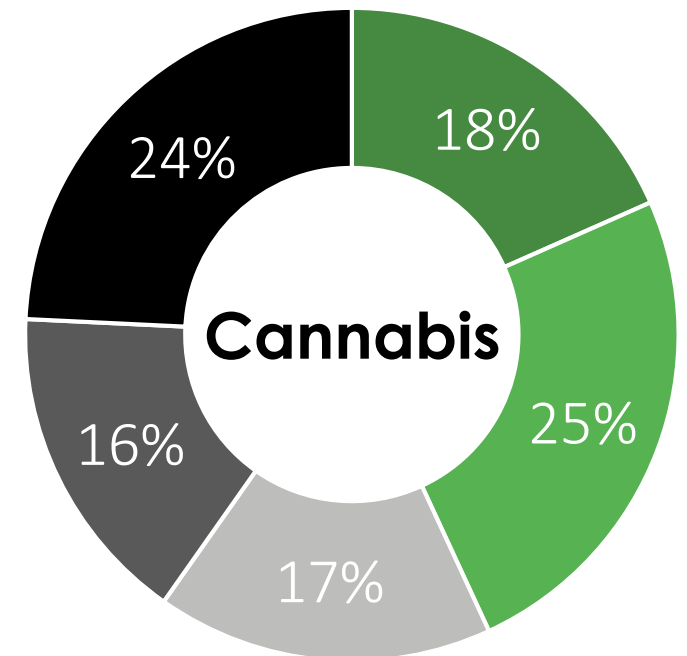
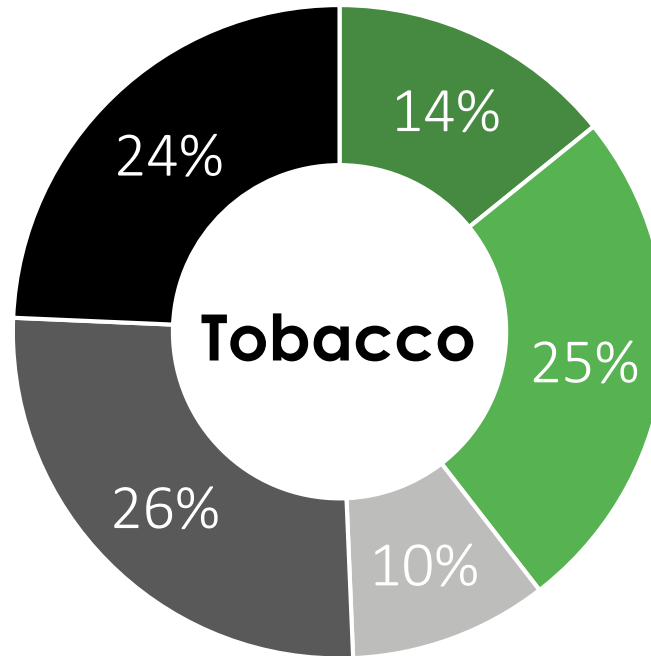
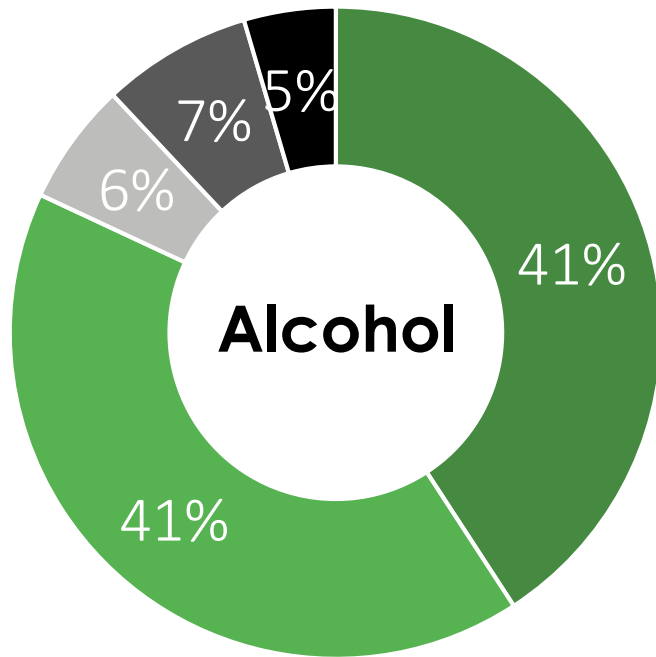
# Methodology

Surveyed nearly 5,000  
Canadians aged 19+ from  
March 2 - 14, 2018

Projected to Canada's  
19+ population by age,  
gender, province and  
major cities

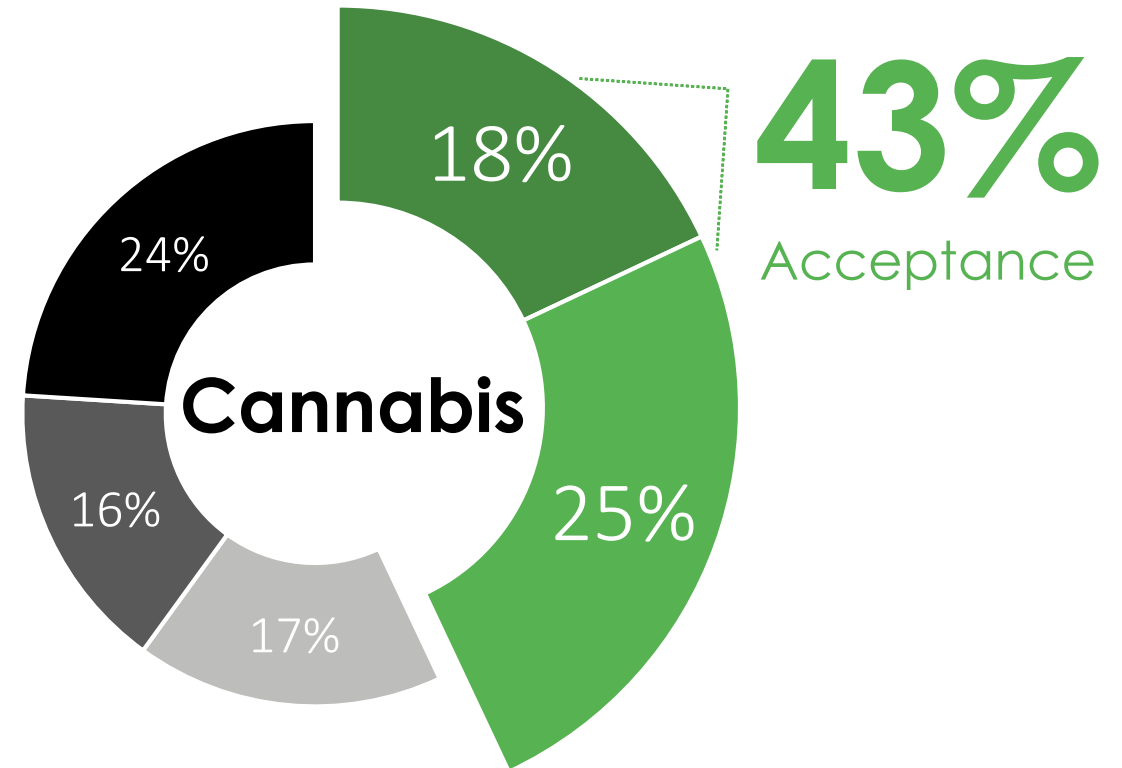
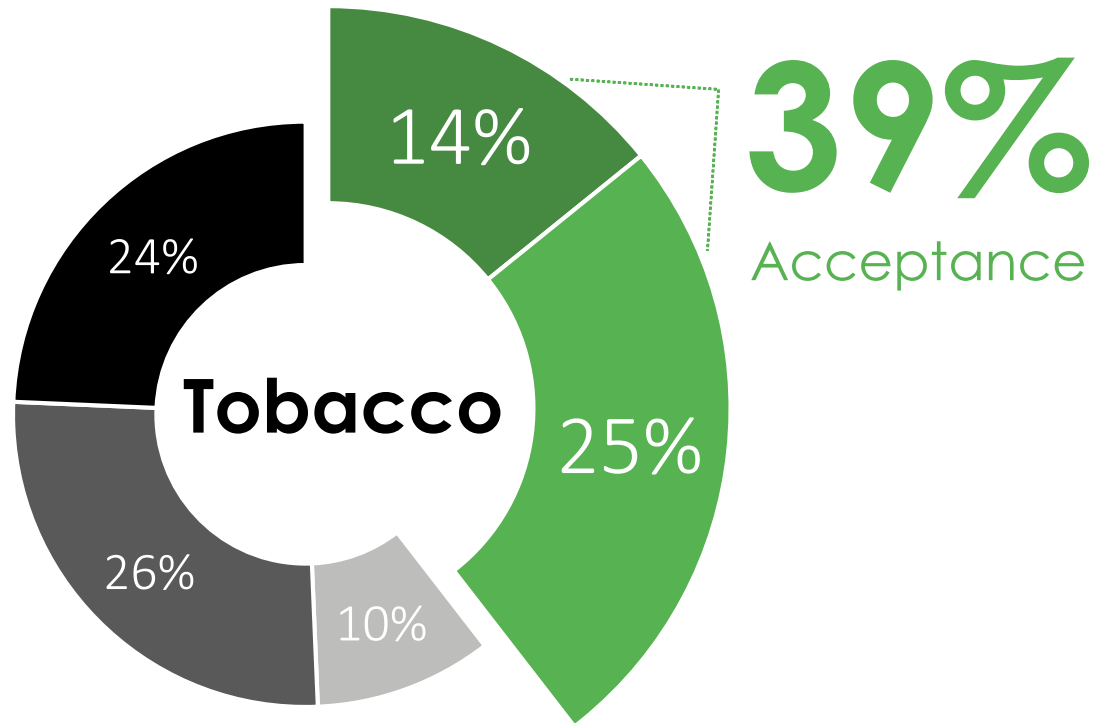


# Social Acceptability of Consumption



■ Completely acceptable ■ Somewhat acceptable ■ Undecided ■ Somewhat unacceptable ■ Completely unacceptable

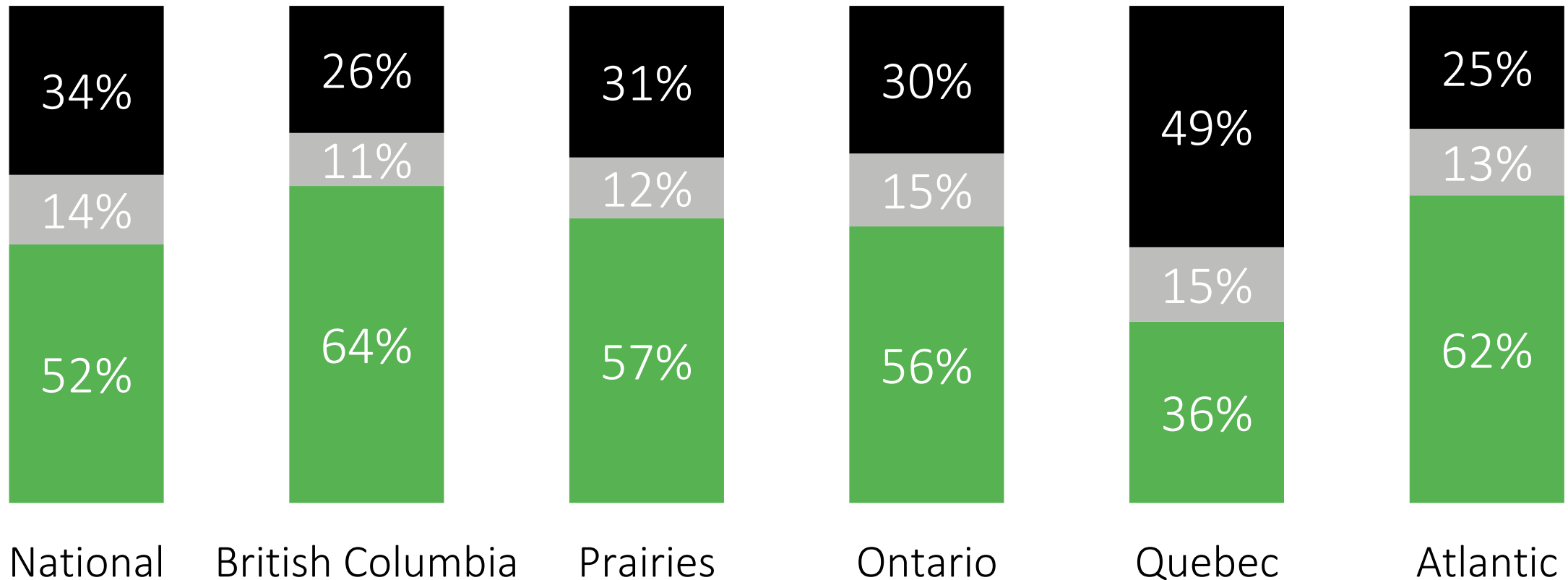
# Social Acceptability of Consumption



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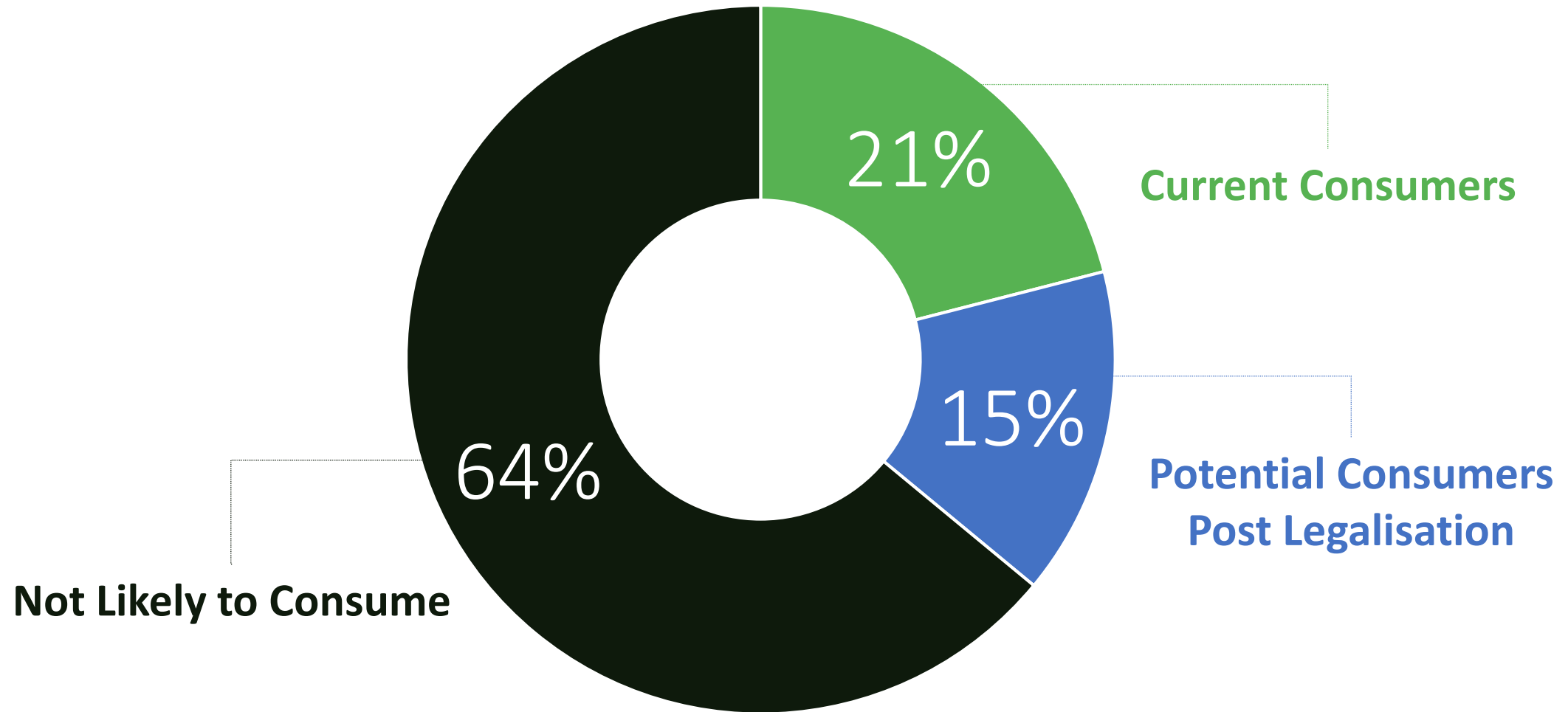
# Support and Opposition Across Canada

■ Support ■ Undecided ■ Oppose



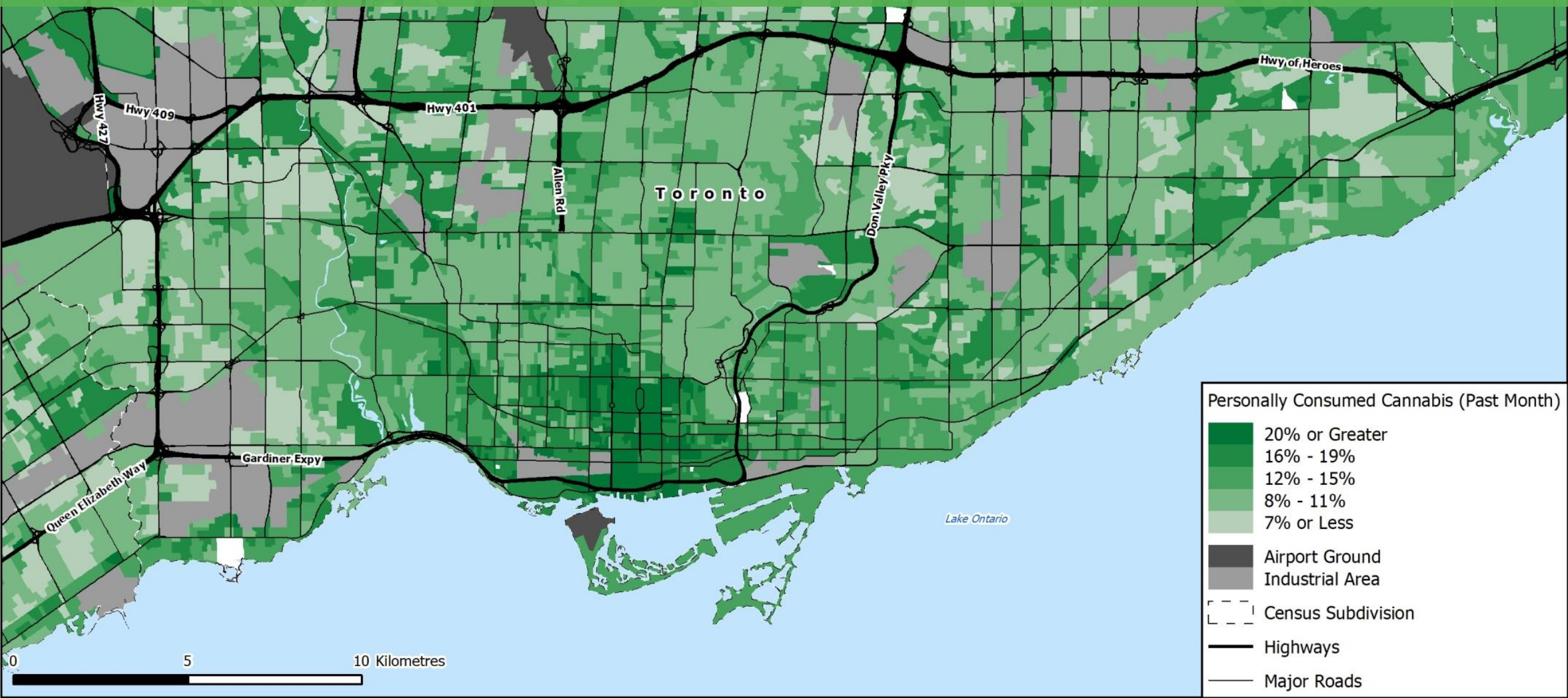


# Current and Potential Consumers



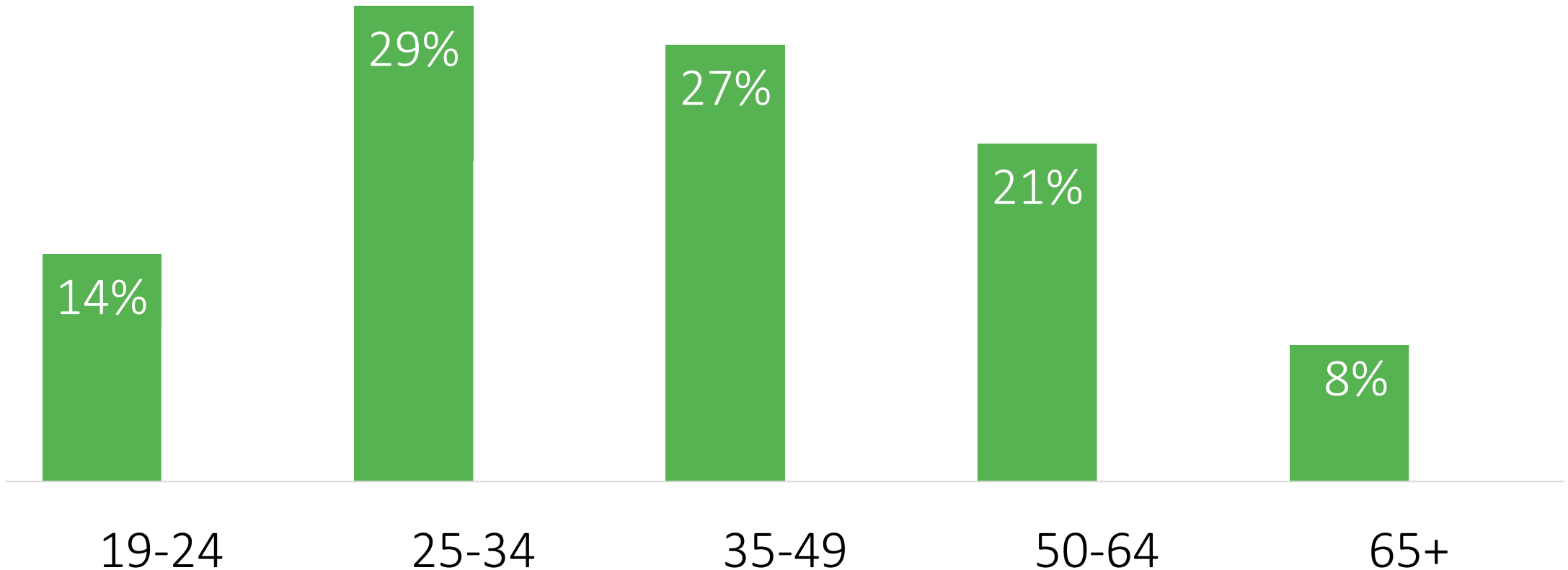
# Strong Sub-regional Variation

Active Cannabis Consumers (Share of Household Population 19+)



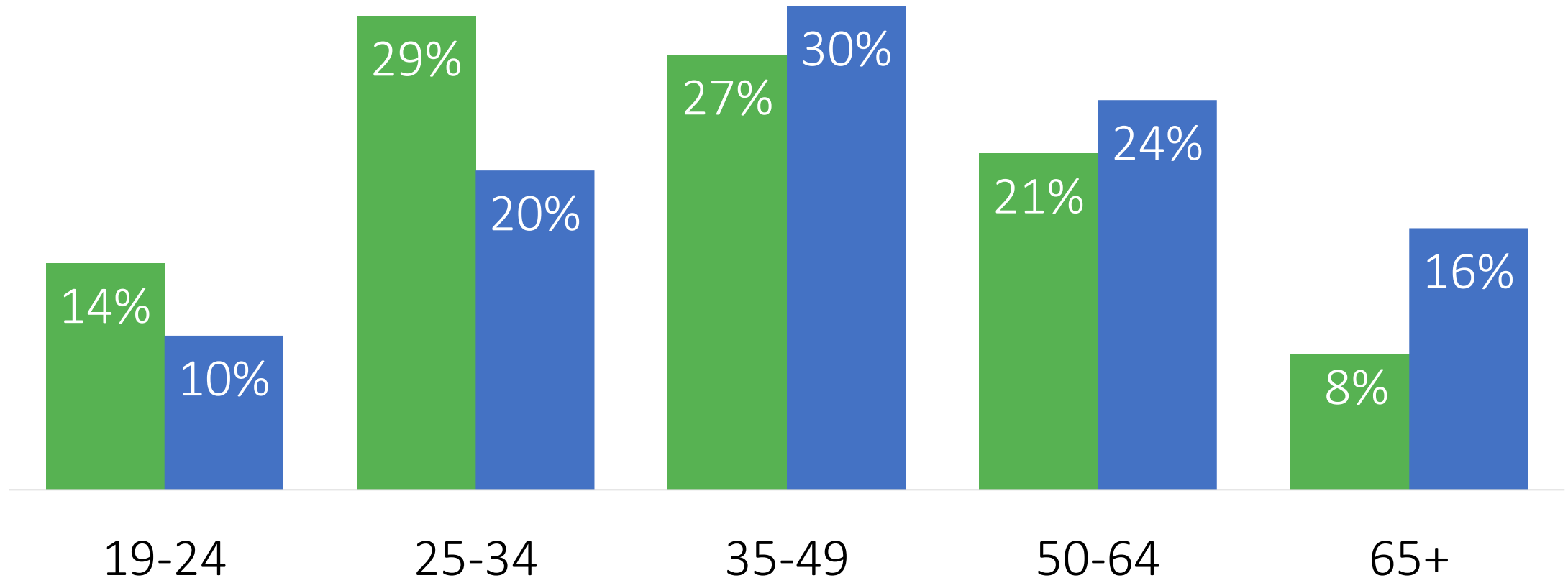
# Current and Potential Consumers by Age

■ Current Consumers



# Current and Potential Consumers by Age

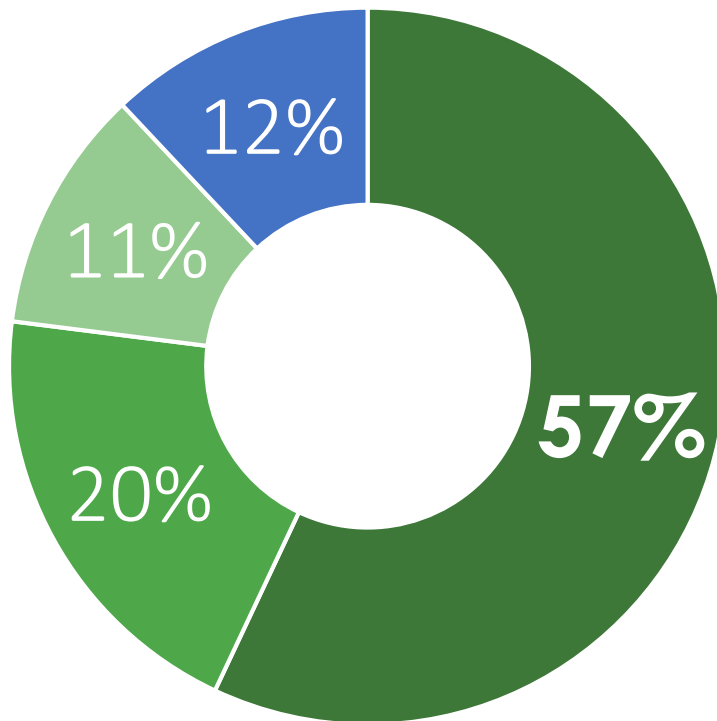
■ Current Consumers ■ Potential Consumers



# Method of Consumption

## Current Consumers

**Most Often** Used Method



■ Smoking a Joint

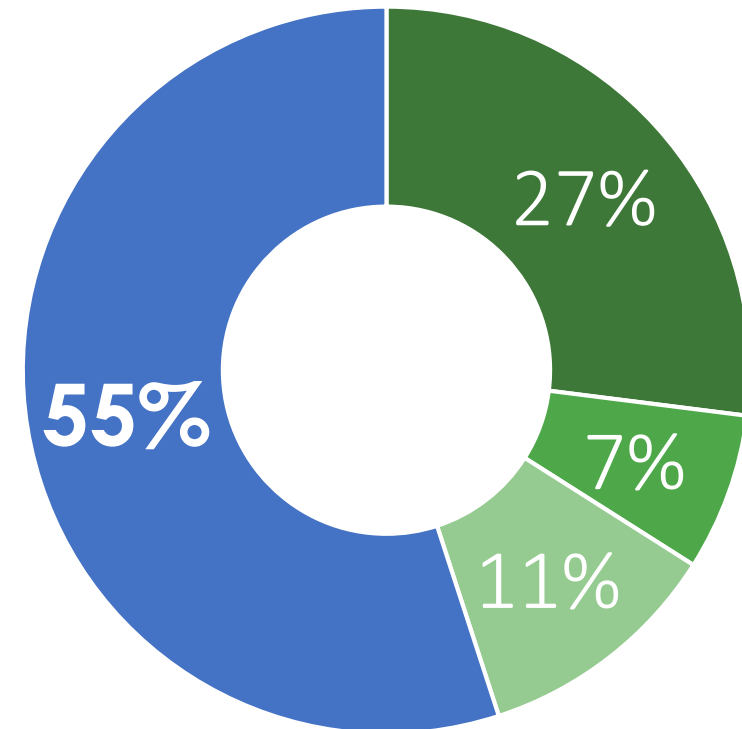
■ Pipe/Bong

■ Vaping

■ Edibles

## Potential Consumers

**Preferred** Method Post Legalisation



■ Vaping

■ Edibles





Cannabis retailers  
marketing edibles  
online despite  
legal hurdles.

# HAPPY HALLOWEED

UP TO 35% OFF



OCT 29-31



Boo! We're back with AN EXTENDED STOREWIDE SALE starting  
Monday, October 29th till Wednesday, October 31st!

EVERYTHING IS ON SALE WITH UP TO 35% OFF



FLOWERS

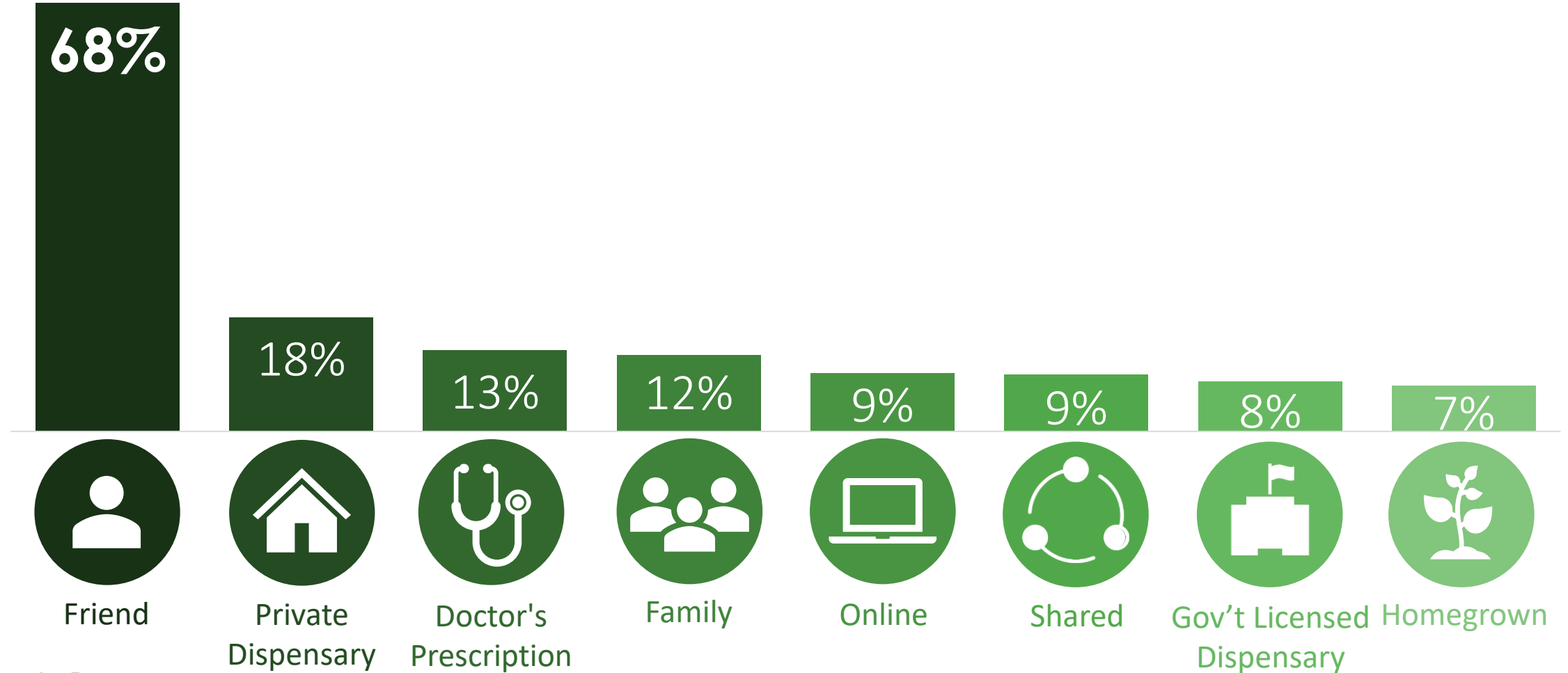
[SHOP FLOWERS](#)



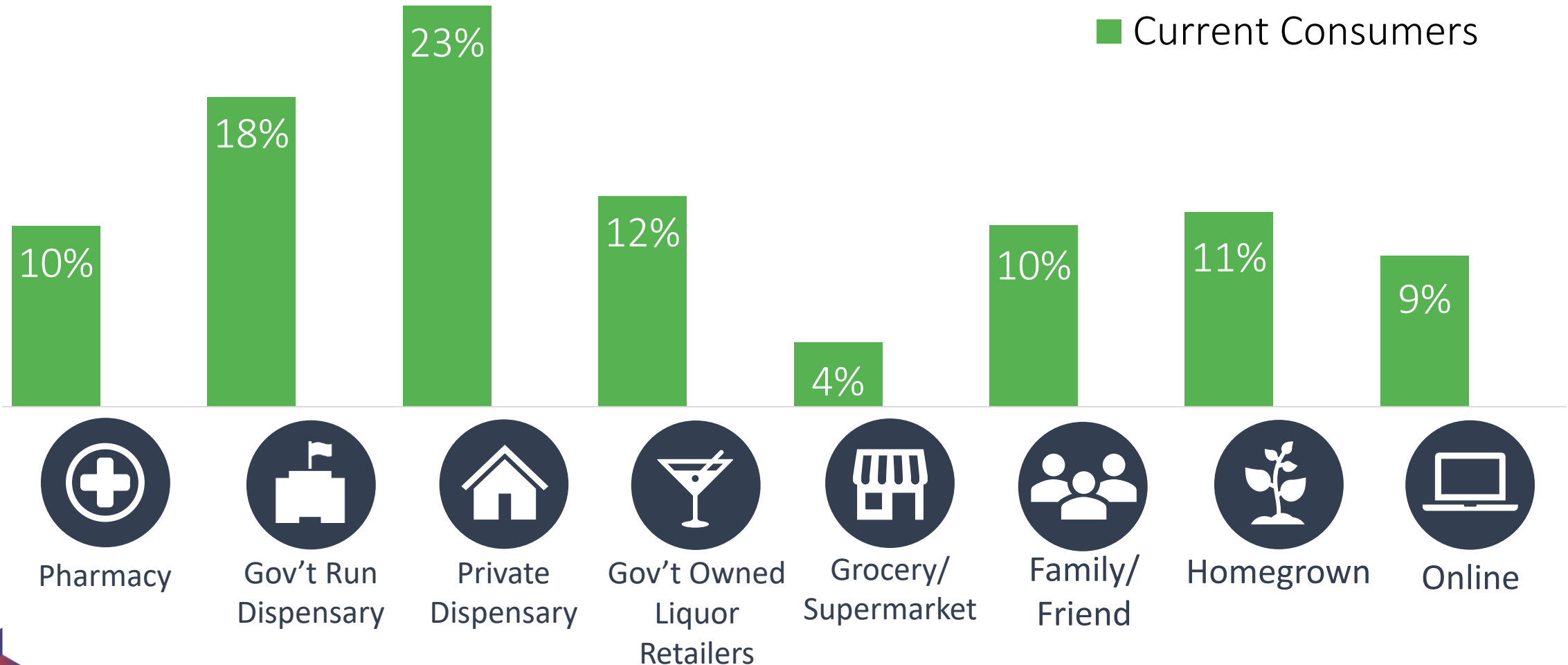
EDIBLES

[SHOP EDIBLES](#)

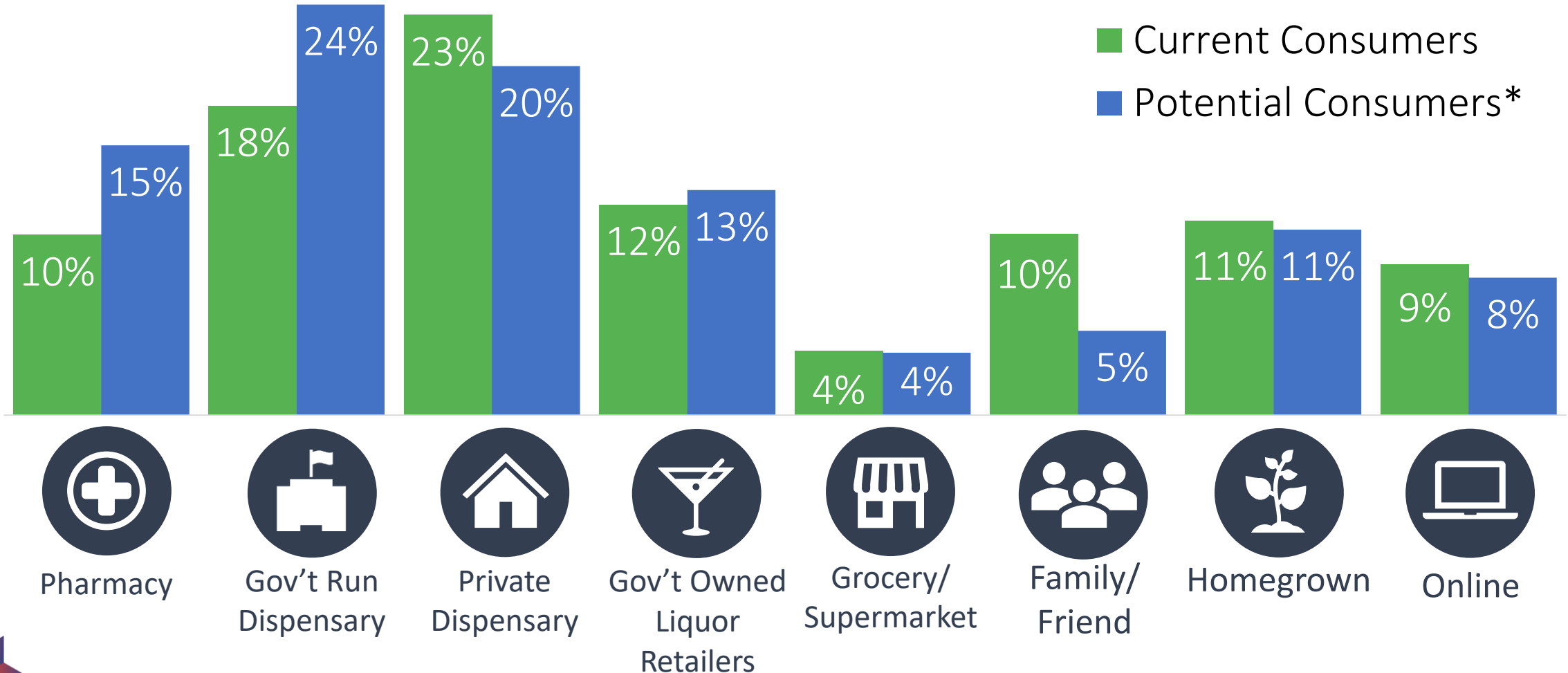
# How Cannabis Was Obtained by Consumers Pre-Legalisation



# Preferred Channel Post Legalisation



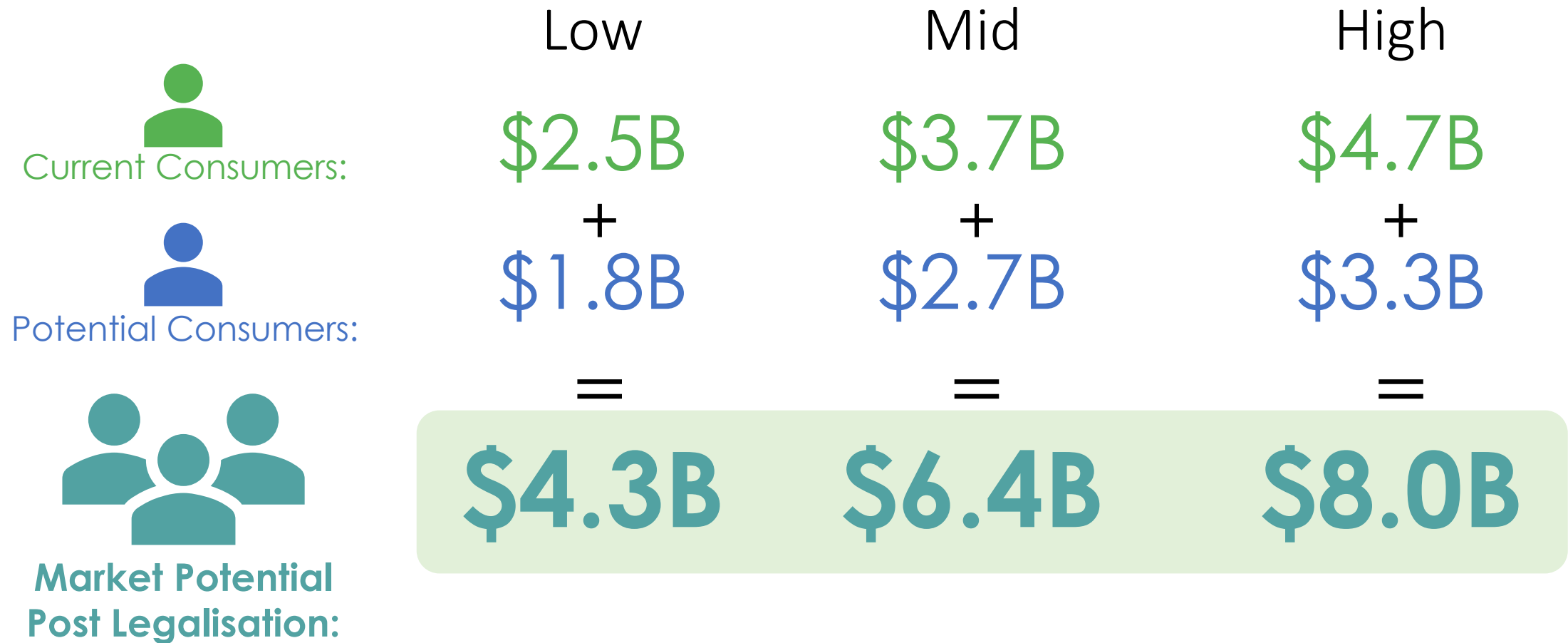
# Preferred Channel Post Legalisation



■ Current Consumers  
■ Potential Consumers\*



# Estimated Market Size and Potential



“Demand for  
legalized  
cannabis draws  
lineups & heavy  
web traffic  
across Canada”

CTV



# CEO of CannTrust apologises for delivery and supply issues.



Dear Valued Patient,

My name is Peter Aceto, and on October 1, 2018, I joined CannTrust as its new CEO.

In four short weeks I have fallen in love with this company, whose success and roots come from our medical clients.

I have heard many stories from our patients about how they rely on us to deliver standardized medicinal cannabis in a reliable consistent way.

Unfortunately, we have recently fallen short of our promise.

With the recreational volumes we have encountered, as well as the impact that legalization has had on some of our third-party testing labs (who we rely on to ensure our product exceeds our quality standards), our inventory has become very low, and we have been temporarily out of stock in several popular product lines.

This is a very serious matter, and we are pushing very hard to fix it urgently. We expect to have our standardized oils and capsules back in stock by this weekend, along with two strains of dried flower.

We promise to keep you updated on all product and strain releases in the upcoming weeks.

As a small gesture, I will see to it that we apply a discount of 10% on your next order. Visit our [shop](#) for details.

Please feel free to respond to us if you wish, and please accept my personal apology for letting you down.

We will get this fixed and will take every step to make sure that we never let you down again.

Sincerely,

Peter Aceto

CEO

CannTrust





# Modernists

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# 37%

of Adult Population

- Support legalization
- Non-users are more likely to use with legalization
- Prefer to purchase from an established company
- See benefits in recreational & medicinal use
- Support the need for firm regulation to avoid excessive use

**Source:** Vividata's Canadian Cannabis Study 2018.

**Base:** Canadians aged 19+



# Utilitarians

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# 33%

of Adult Population

- Support legalization
- Support cannabis as a form of medical treatment
- See utility in Cannabis use
- People will make their own choice on whether to consume or not without outside influence
- Legalisation won't encourage excessive use

**Source:** Vividata's Canadian Cannabis Study 2018.

**Base:** Canadians aged 19+





# Cynics

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# 29%

of Adult Population

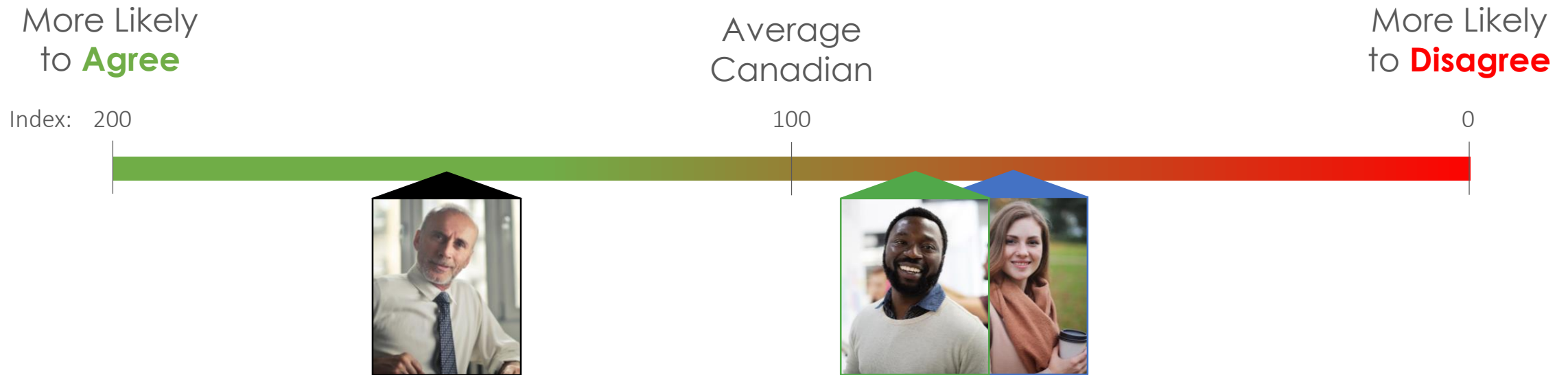
- Oppose legalization
- Want more government research needed
- Gateway drug
- Under age consumption
- Advertising will influence non-users to try cannabis

**Source:** Vividata's Canadian Cannabis Study 2018.

**Base:** Canadians aged 19+

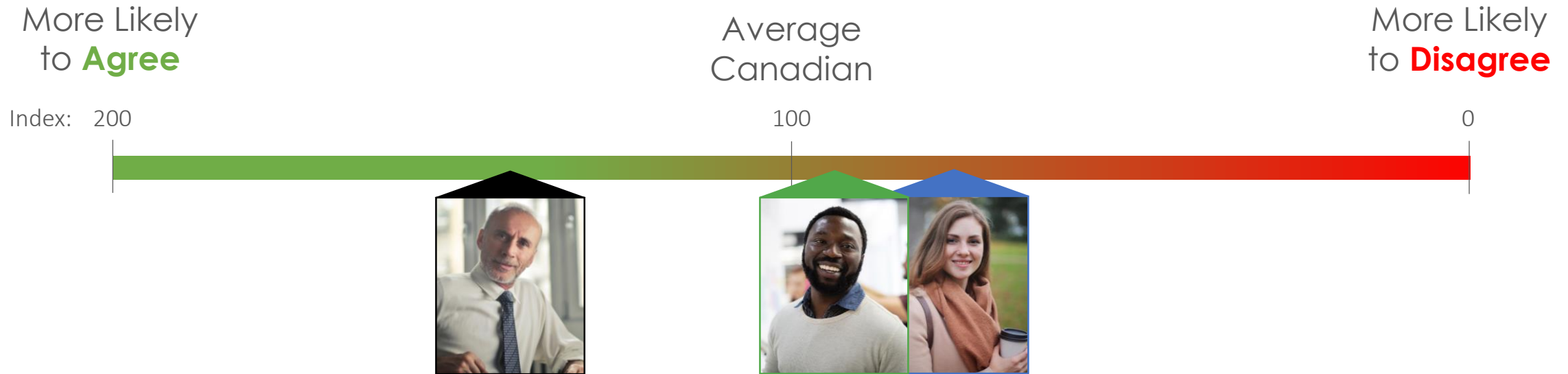
# Opinions on Cannabis as a Gateway Drug

*“Cannabis is a “gateway drug” that leads users to other more harmful drugs.”*



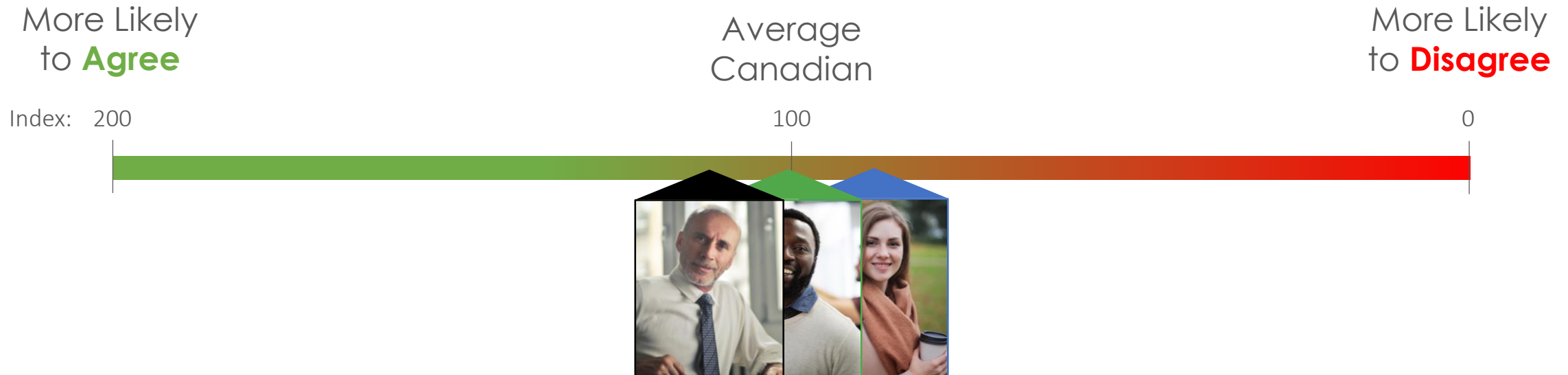
# Opinions on Cannabis Consumption

*"I'm concerned people will consume cannabis in excess due to legalization."*



# Opinions on Packaging

*“Cannabis packaging needs to specify effects on behaviour.”*



# Canada<sup>🇨🇦</sup>

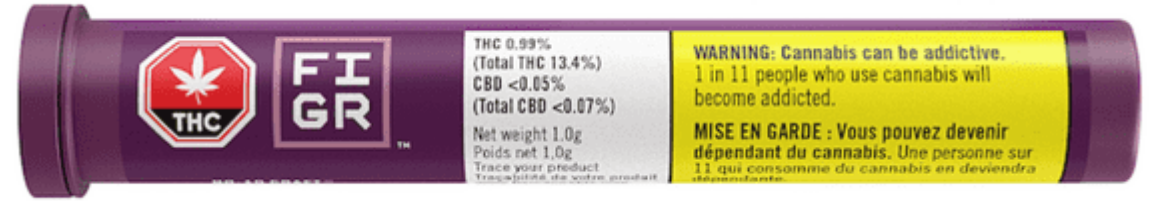
## Example of Proposed Packaging & Labeling Requirements





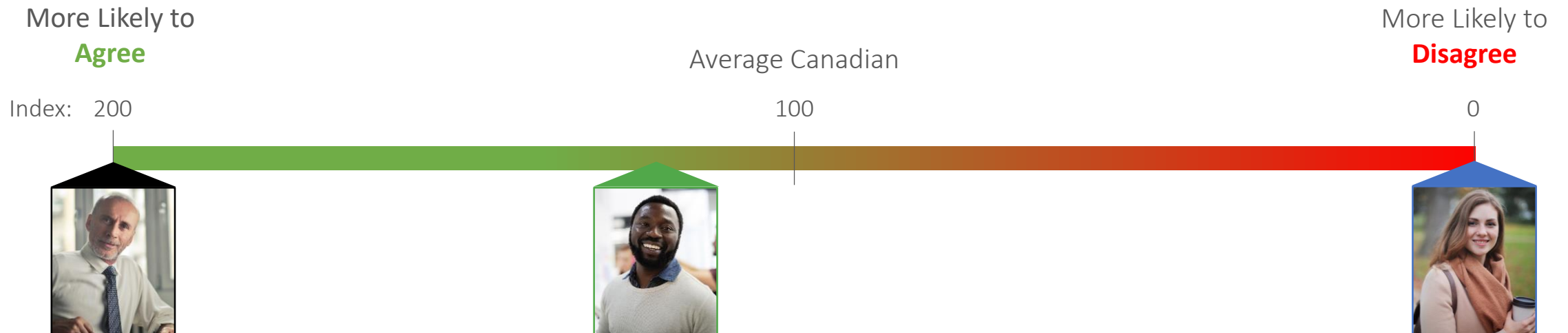
# Packaging

## Will Not Be a Point of Differentiation



# Opinions on Advertising

*“Media advertising will influence non-consumers to try cannabis.”*



Civilized.

THIS  
IS MY  
PEACE  
SIGN



Civilized.  
Cannabis Culture Elevated

A Civilized Conversation With

# CHELSEA HANDLER

Presented by  
Civilized.

## Canadian Tour

09 / 20	CALGARY, AB
09 / 21	VANCOUVER, BC
09 / 22	WINNIPEG, MB
10 / 04	MONTREAL, QC
10 / 05	OTTAWA, ON
10 / 06	TORONTO, ON
10 / 07	HALIFAX, NS

For tickets, visit:  
[CIVILIZED.LIFE/CHELSEA](https://civilized.life/chelsea)







*Entrepreneur*  
**Stoner**

[forgetstoner.com](http://forgetstoner.com) | **MedMen**



*Officer*  
**Stoner**

[forgetstoner.com](http://forgetstoner.com) | **MedMen**



*Designer*  
**Stoner**

[forgetstoner.com](http://forgetstoner.com) | **MedMen**

LEARN  
MORE  
TO GET  
ROLLING.

GO TO  
[EDUCATE.TOKYOSMOKE.COM](https://educate.tokyosmoke.com)

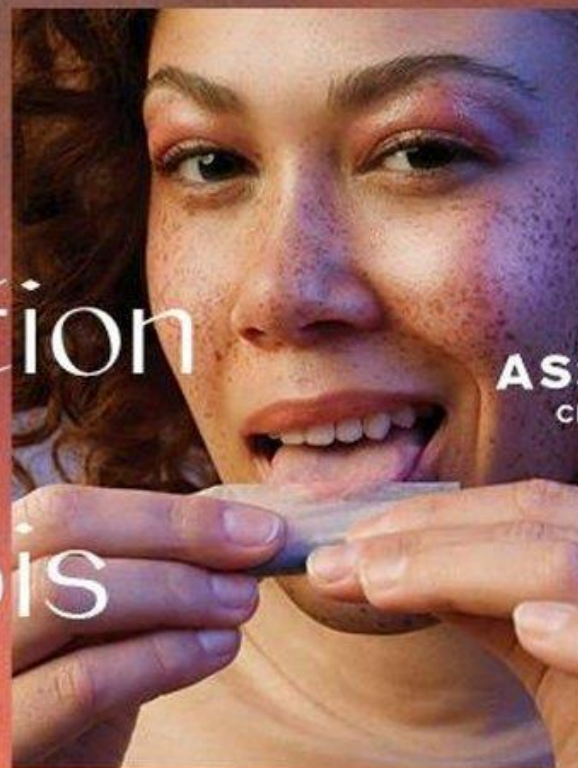


TOKYO  
SMOKE



HIGHER LEARNING

# An Introduction to Cannabis



**ASSEMBLY**  
CHEF'S HALL

TOKYO SMOKE x ASSEMBLY CHEF'S HALL





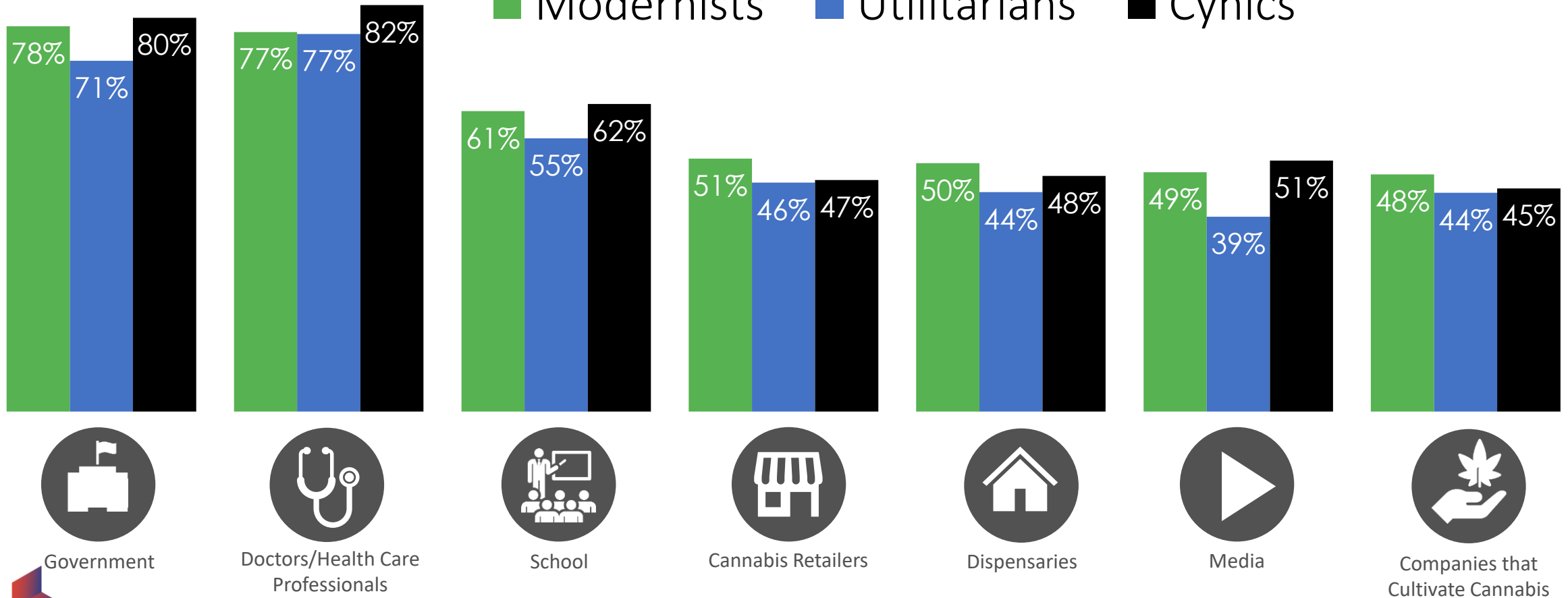
**THE**  
**TRAGICALLY**  
**HIP**





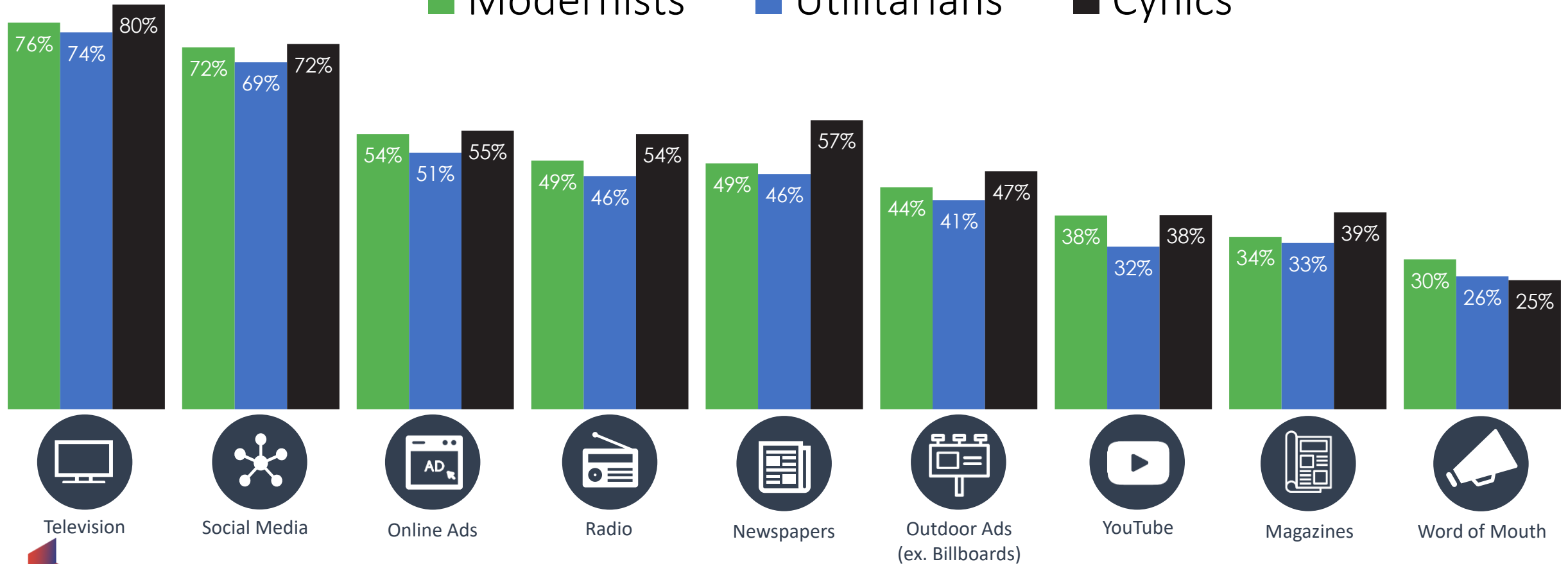
# Who Should Be Educating on Effects of Cannabis

■ Modernists ■ Utilitarians ■ Cynics



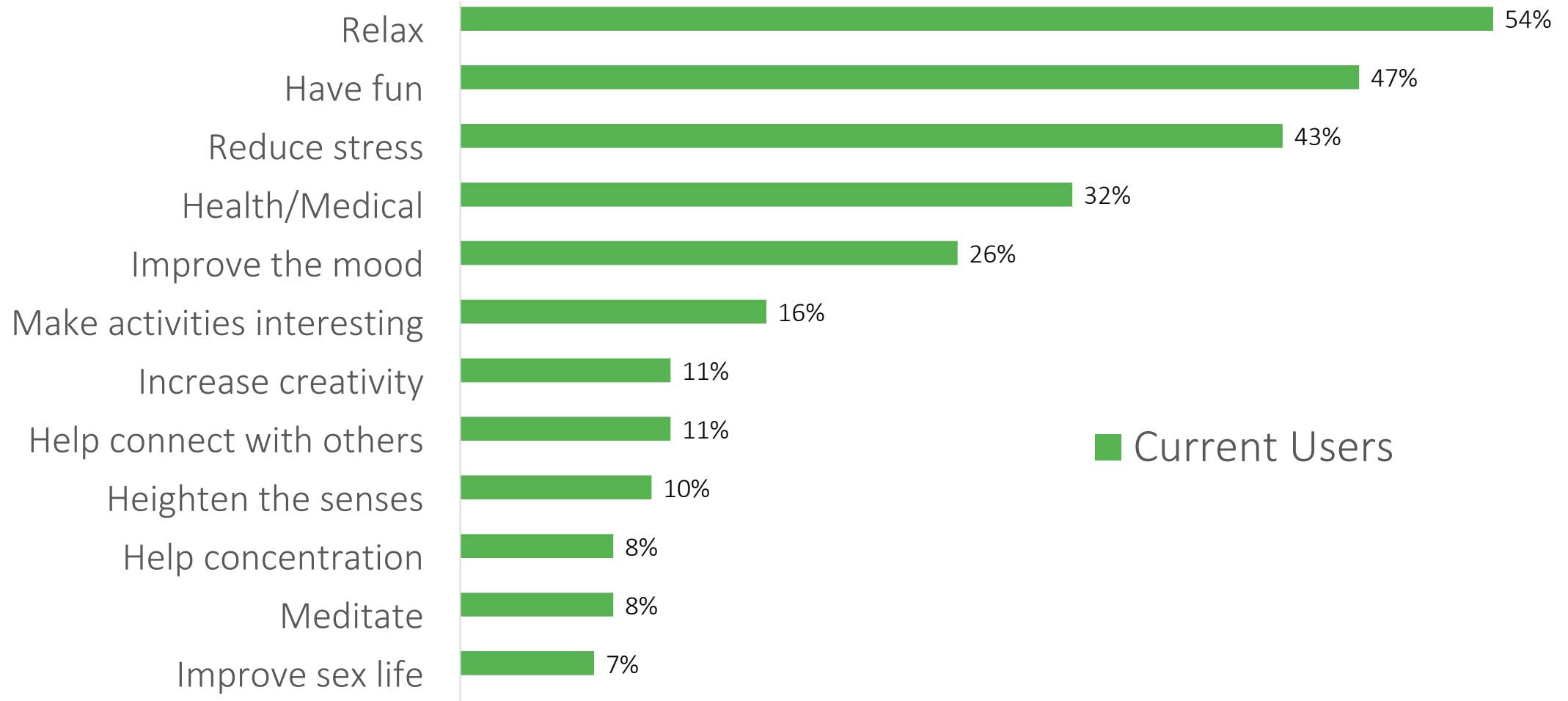
# Key Media Channels for Public Education

■ Modernists    ■ Utilitarians    ■ Cynics



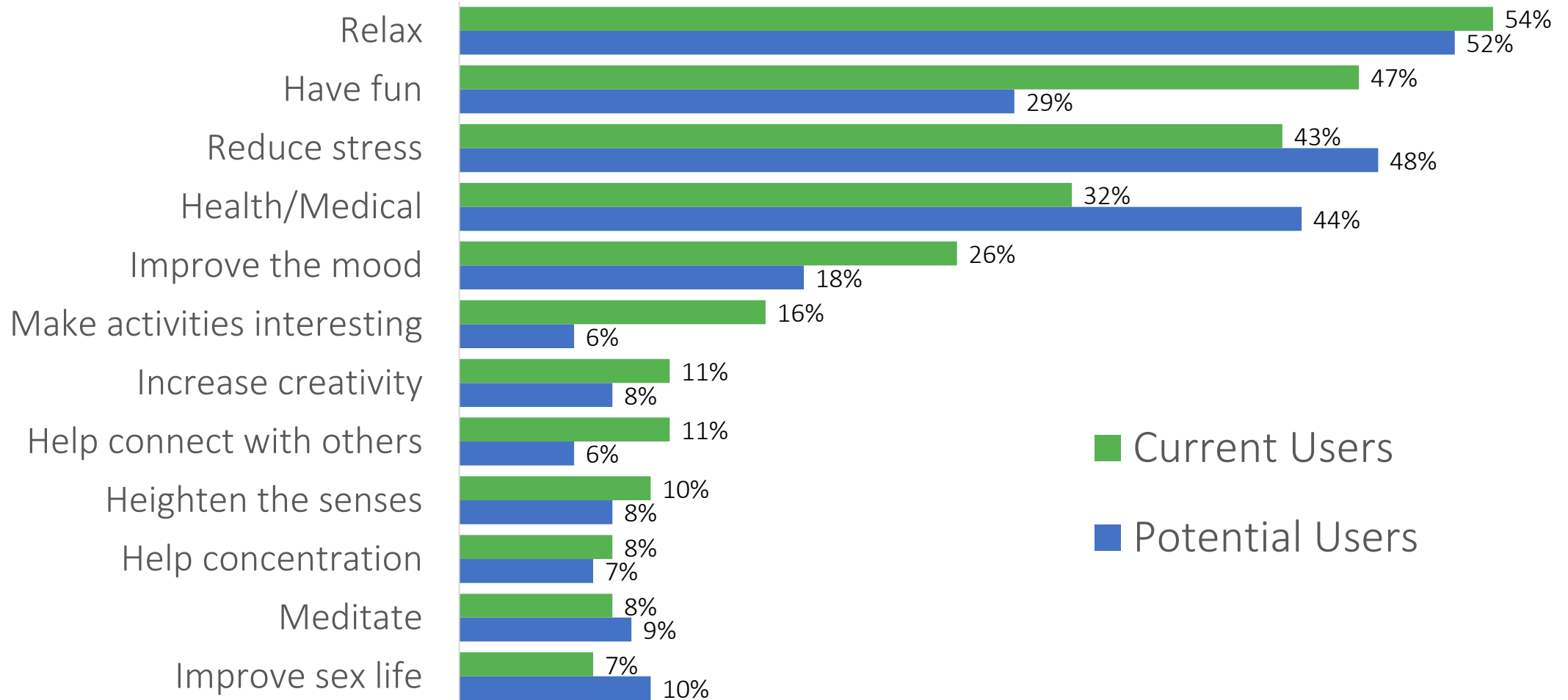


# Motivation to Consume Among Current & Potential Consumers

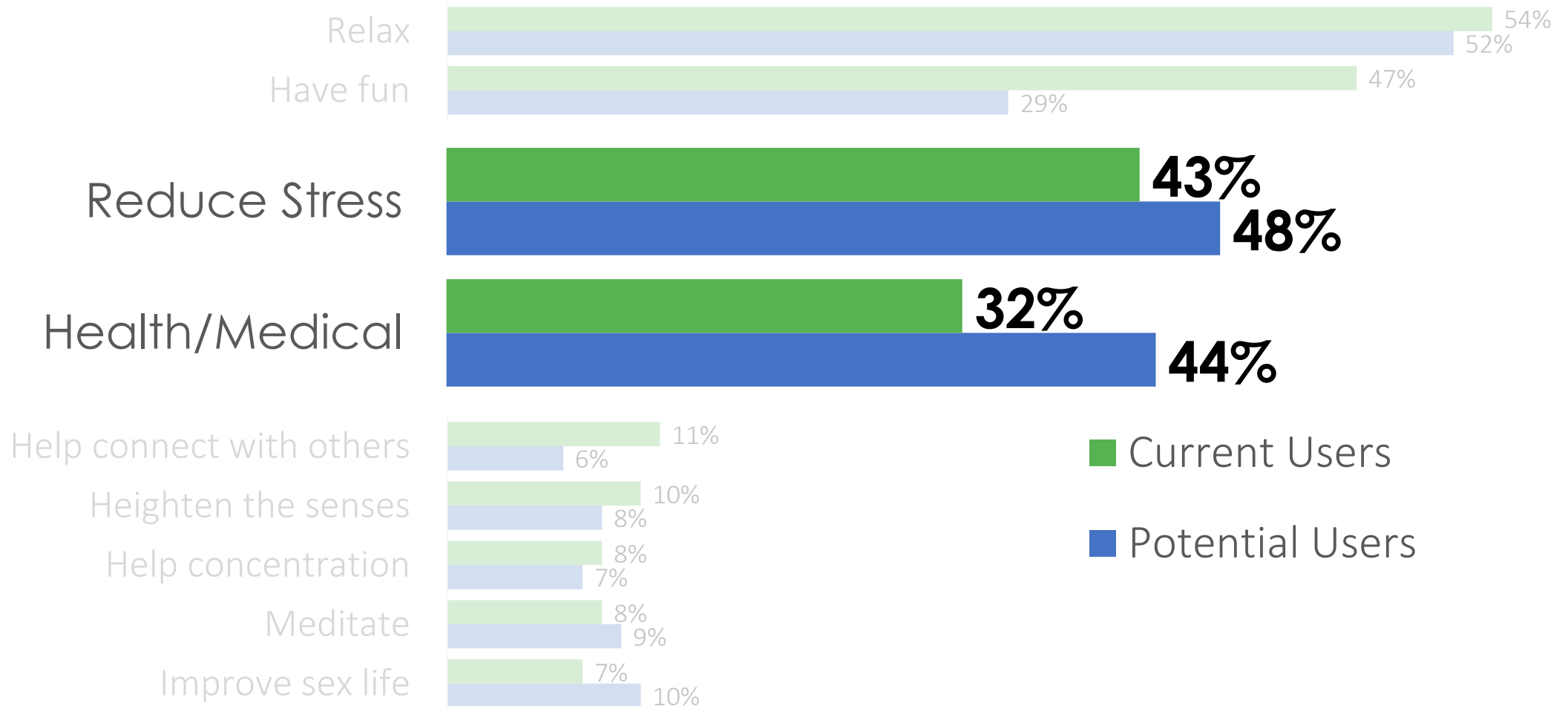


■ Current Users

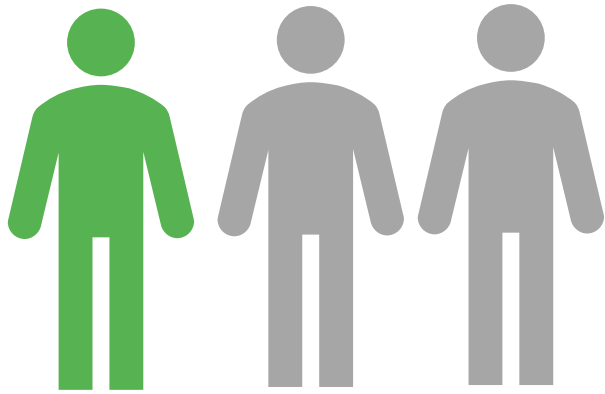
# Motivation to Consume Among Current & Potential Consumers



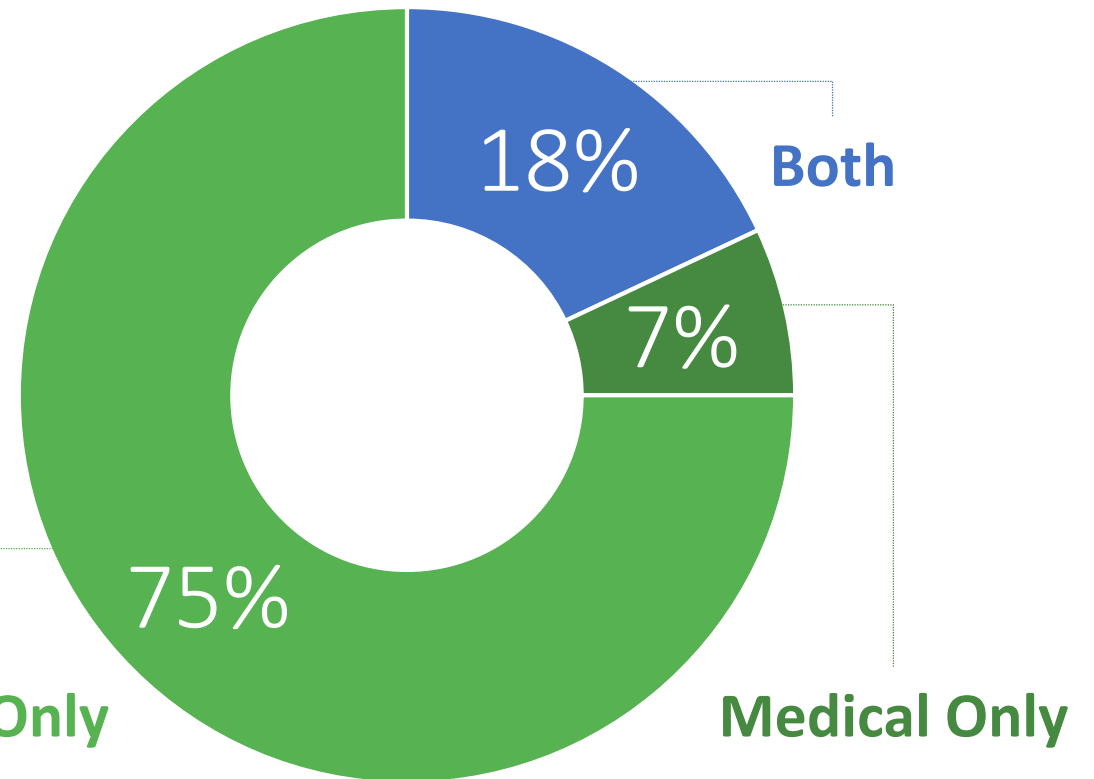
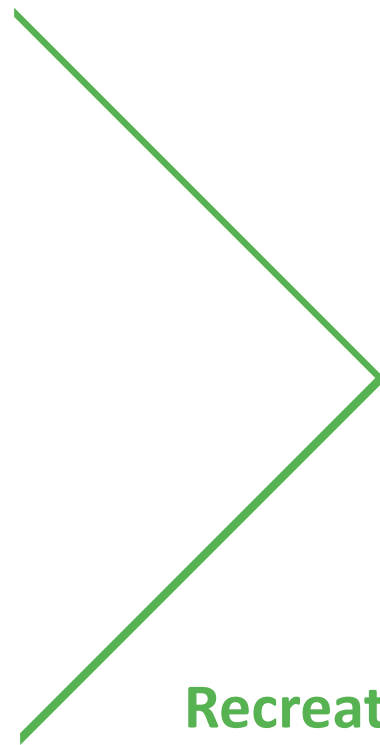
# Motivation to Consume Among Current & Potential Consumers



# Why Canadians Consume Cannabis



**1 in 3** Canadian adults have consumed cannabis at some point.

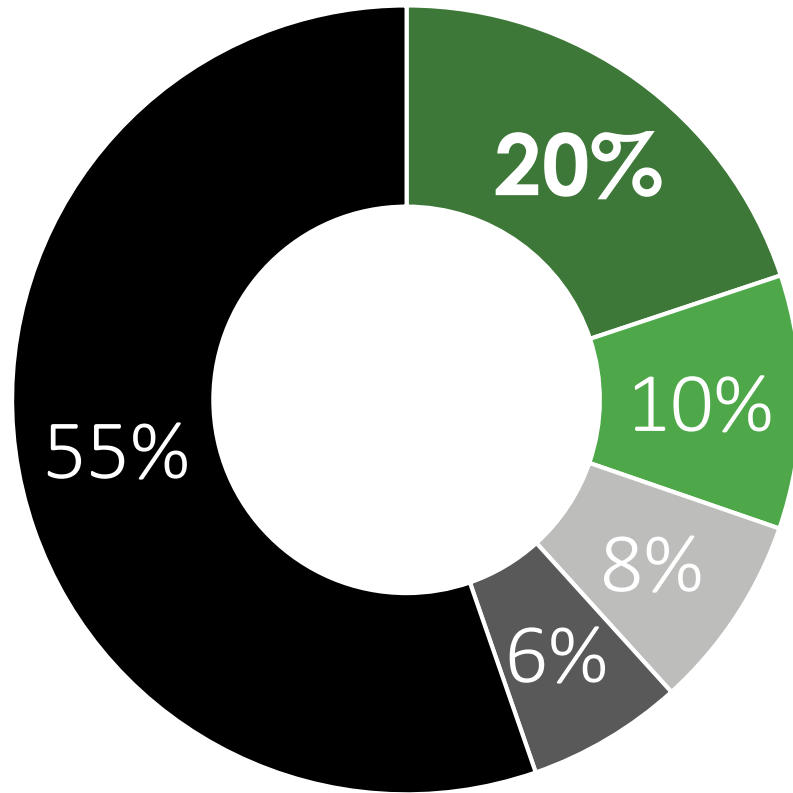


Recreational Only

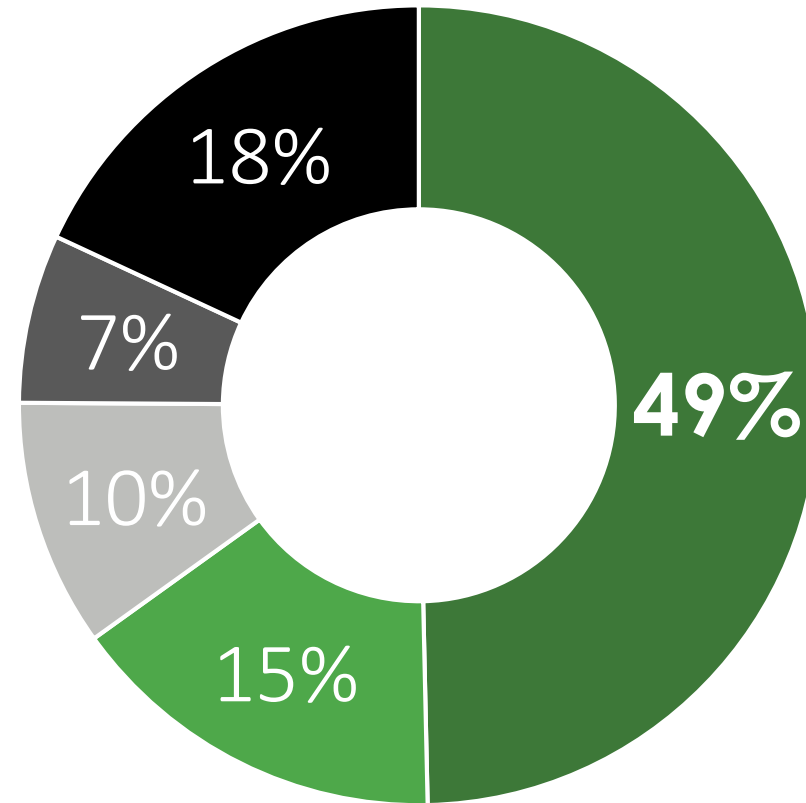
Medical Only

# Recency of Use Amongst Users

## RECREATIONAL USERS



## MEDICINAL USERS



■ Yesterday ■ Past week ■ Past month ■ Past 3 months ■ Past 6 months or longer





# Welcome to Aphria

Powered by Sunlight



**100% Greenhouse Grown  
Medical Cannabis**

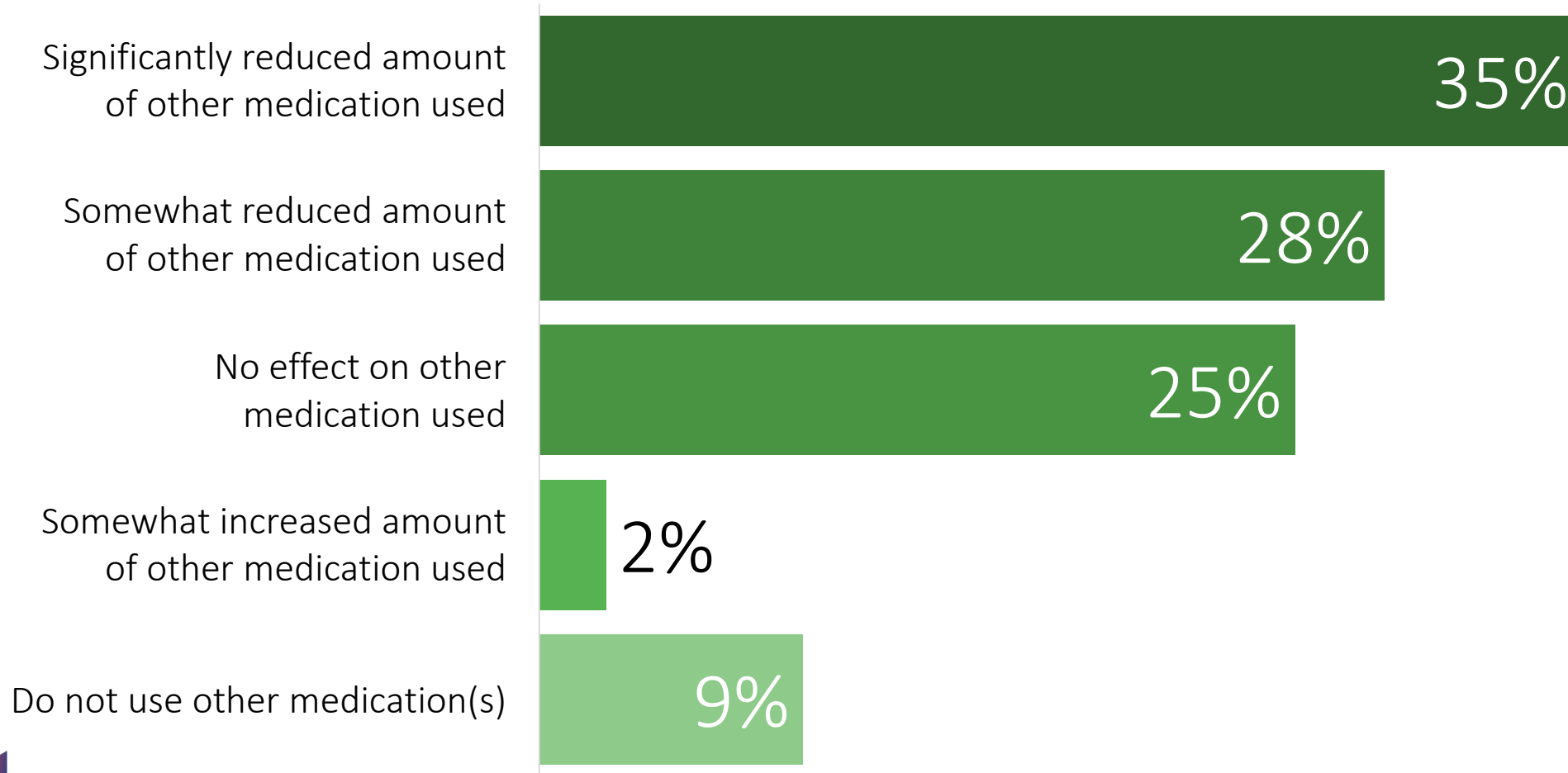


**Superior Patient Care**

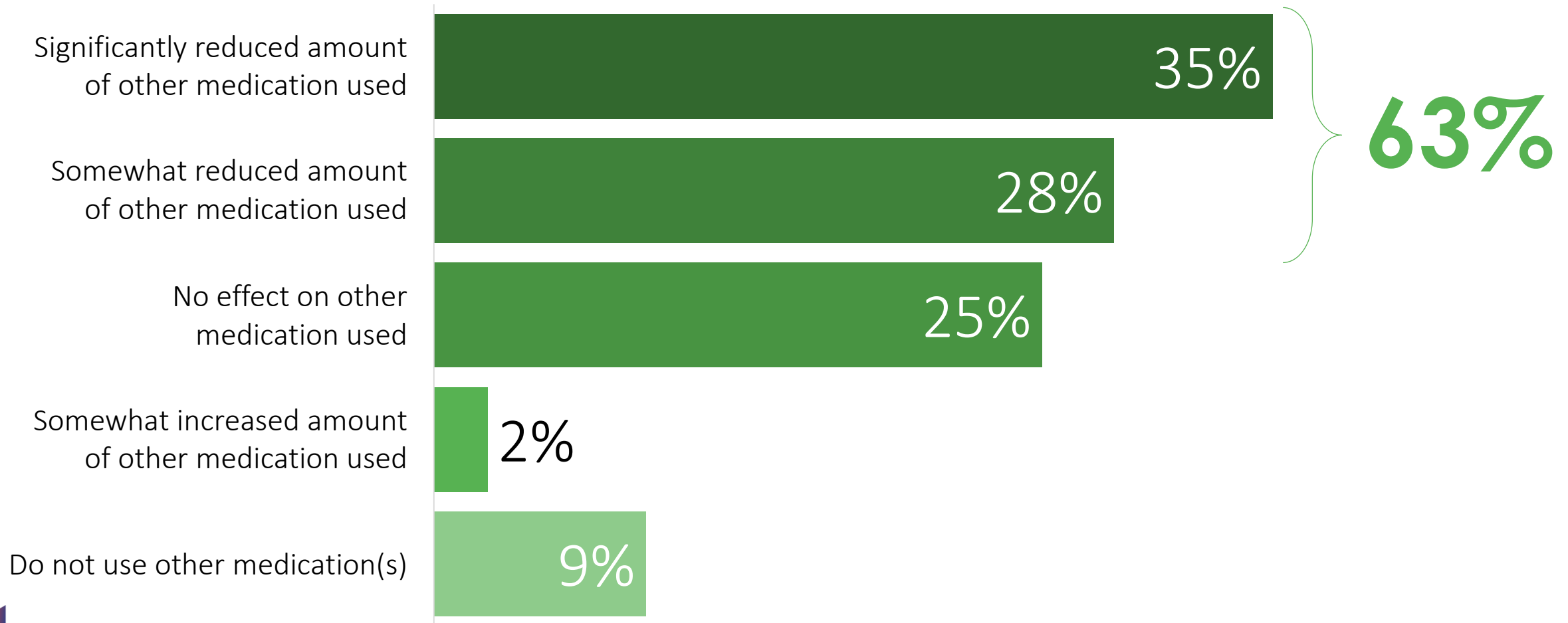


**Safe and Consistent Products**

# Effects of Cannabis on Other Medication



# Effects of Cannabis on Other Medication



# Cannabis as an Alternative



**2.5M**

Canadian adults  
suffer from  
**depression.**



**1.2M**

Canadian adults  
suffer from  
**migraines.**



**3.7M**

Canadian adults  
suffer from  
**arthritis.**

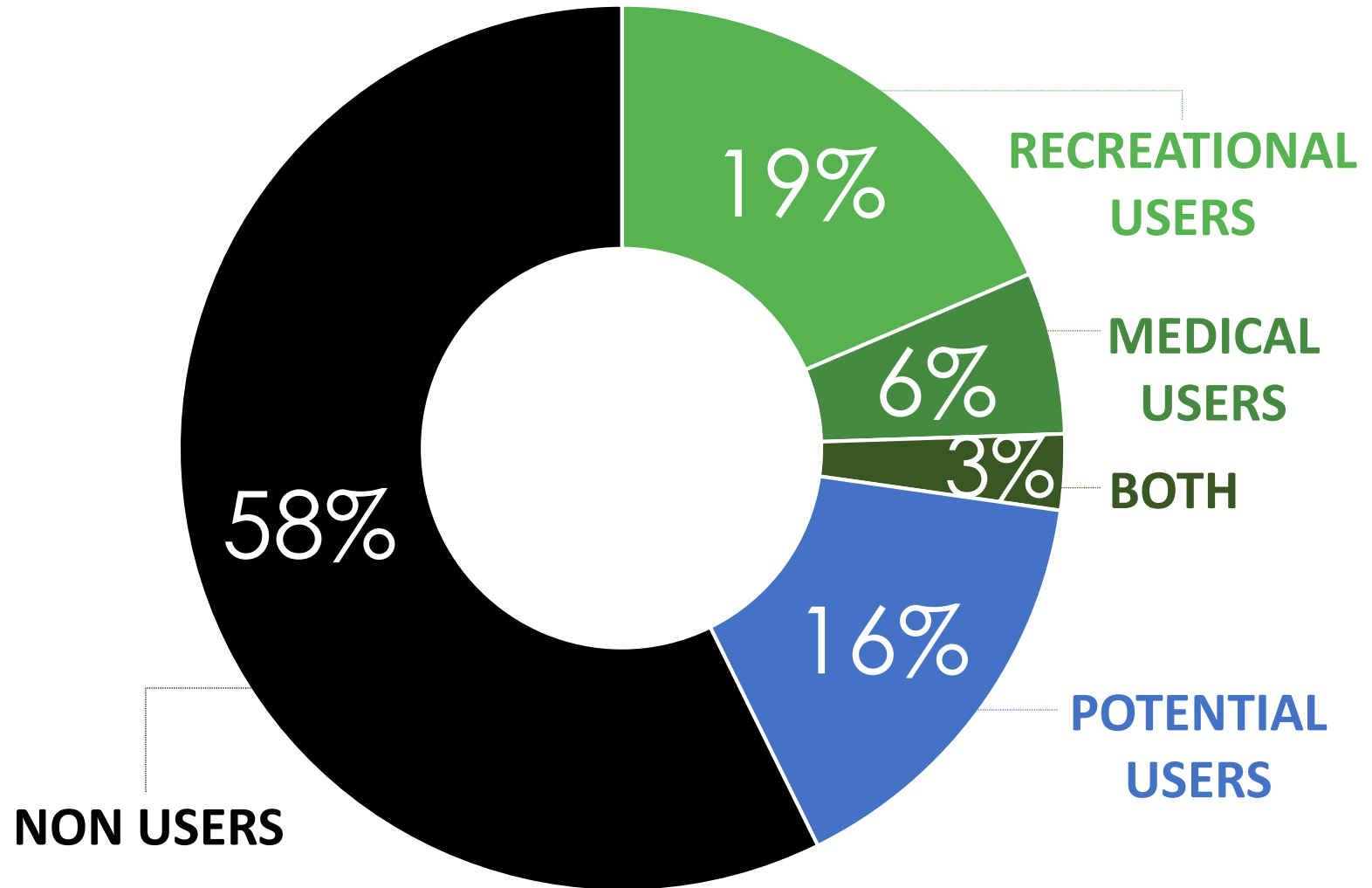


# Cannabis Use Among Those Suffering Depression



**2.5M**

Canadian adults  
suffer from  
**depression.**



**Source:** Vividata's Fused Spring 2018 Study.  
**Base:** Canadians aged 19+

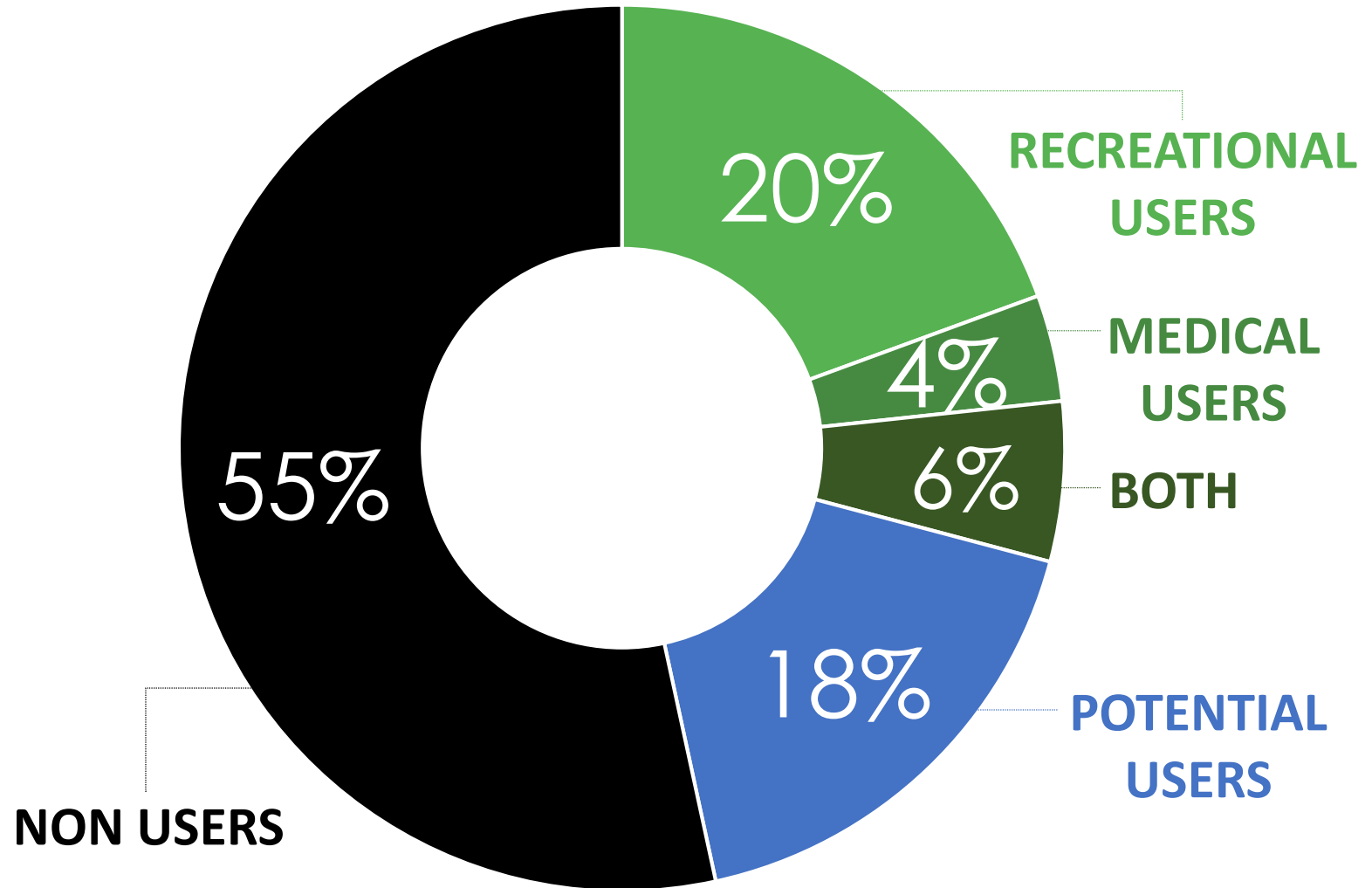


# Cannabis Use Among Those Suffering Migraines



**1.2M**

Canadian adults  
suffer from  
**migraines.**



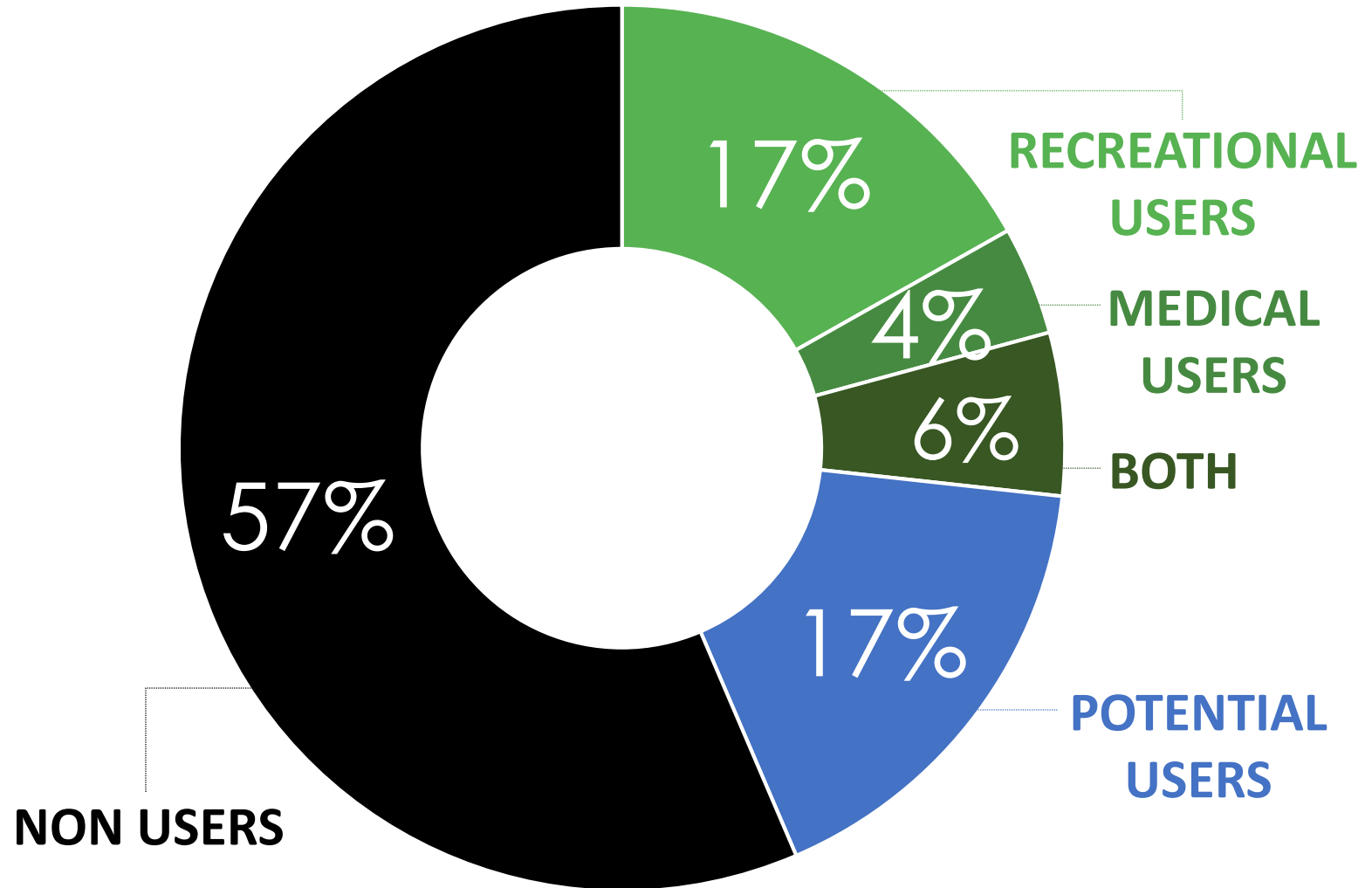
**Source:** Vividata's Fused Spring 2018 Study.  
**Base:** Canadians aged 19+

# Cannabis Use Among Those Suffering Arthritis



**3.7M**

Canadian adults  
suffer from  
**arthritis.**



**Source:** Vividata's Fused Spring 2018 Study.  
**Base:** Canadians aged 19+

# 2 in 5

**Potential Users** of cannabis used **pain relievers for headaches** in the past 6 months.





# 1 in 4

**Potential Users** of cannabis used **pain relievers for muscle or body** in the past 6 months.



# 1 in 5

**women aged 35-49**  
who suffer from  
**insomnia** are  
**Potential Users** of  
cannabis.





# Next Steps:

More Detailed  
Measurement  
of **Health &  
Medical Use**



# Next Steps:

More Detailed  
Measurement of  
**Recreational Use**



# Questions?



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 [@VividataCanada](https://twitter.com/VividataCanada)

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