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Public Opinion Research (POR) on Motivations of Cannabis Users Who Obtain Cannabis from Sources Other Than Legal/Licensed Sources

Public Safety Canada

Executive Summary

November 2023

Prepared for:

Public Safety Canada

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Ce rapport est aussi disponible en français.

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This report summarizes the findings from 11 online focus groups with adults in Canada who use cannabis products and do not obtain all of them from authorized sources. The focus groups were held between October 16 and November 2, 2023, and included individuals from across the country. Sessions were segmented by age group. Each focus group session lasted approximately 90 minutes.

Cette publication est aussi disponible en français sous le titre : ROP sur les motivations des consommateurs de cannabis qui obtiennent leurs produits de sources autres que des sources légales ou détenant un permis

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Signed:

A handwritten signature in black ink, appearing to read "Rick Nadeau", is written over a light gray, textured rectangular background.

November 6, 2023
Rick Nadeau, President
Quorus Consulting Group Inc.

Executive summary

Background and research objectives

Since 2018 the legal cannabis market has grown exponentially. At the same time, the proportion of Canadians purchasing cannabis from legal sources continues to rise. However, recent research shows that 30% of cannabis users use sources other than a known legal/licensed source.

The purpose of this qualitative research was to gain a deeper understanding of the motivations of those who continue to obtain cannabis from sources other than those that are legal/licensed. The project supports Public Safety Canada's mandate to enhance community safety and reduce serious and organized crime, and the Government of Canada's policy to establish a robust legal and well-regulated cannabis market. Specifically, Public Safety Canada is seeking to understand:

- why some users obtain cannabis from sources other than legal/licensed sources despite the fact that legal cannabis is verified for quality, priced competitively and available across the country through authorized in-store and online retailers;
- what contextual, personal, or social factors may affect these motivations;
- assess level of awareness and concern about the personal health and safety, financial and societal risks associated with illegal/unlicensed cannabis products;
- what might influence this group of cannabis users to change their behaviour.

Methodology

The research methodology consisted of 11 online focus groups composed of adults in Canada who use cannabis products and do not obtain all of them from authorized sources. Each session lasting approximately 90 minutes, the focus groups were held between October 16 and November 2, 2023, and were segmented by region and age group. Participants were informed upfront that the research was being conducted on behalf of Public Safety Canada and they each received an honorarium of \$125 for their participation. In total, 70 individuals participated in the research.

Research findings

Reasons for using cannabis and format preferences

At the beginning of each session, participants expanded on their reasons for using cannabis, typical settings, frequency and preferred formats. Some of the more common trends included the following:

- Medicinal¹ and recreational users were well represented in all sessions.
- Those who used cannabis entirely or partially for medicinal purposes often used it to help them manage pain, their sleep or anxiety. A range of cannabis products and formats were being used for these purposes and frequency was often daily. Depending on the type of day or week they were having, some might only use a cannabis product “as needed” to help them manage pain.
- Recreational users varied in terms of frequency and most often used joints, vaping and edibles.
- Across all groups, the most common formats were dry leaf products/joints, edibles and vaping.
- Those who use mostly or entirely for medicinal purposes almost always consume their cannabis product at home on their own whereas those who use recreationally might do so on their own but also socially.

Exploring cannabis product sources

The purpose of the research was to understand motivations for obtaining cannabis products from sources other than from legal or licensed sources and as such, all participants used “other” sources. The main trends around cannabis product sourcing included:

- Those who use medicinally and mostly rely on products that involve some sort of “dosage” or mixture, such as oils, creams and pills, tended to obtain those products exclusively from authorized sources. The main reasons were to ensure consistency in the quality of the product and a high degree of control over dosage.
- Unauthorized sources were most often used for edibles and leaf products.

¹ “Medicinal” in this case refers to those who elect to use cannabis and claim to do so for therapeutic purposes. Medicinal does not refer to those who use cannabis for medical purposes and hold a prescription a registered physician.

- The most common types of unauthorized sources were online, a local and trusted “dealer” and from friends who either “gifted” them cannabis products or sold it to them.
- The main reasons for resorting to unauthorized sources were price and quality of the product, as well as trust or personal connection with the unauthorized source.

Nearly all participants felt they were aware that only cannabis products from government regulated, authorized retailers are legal and few could think of any situation where they were not sure if they were obtaining legal or illegal cannabis. That said, the following emerged around consumer awareness:

- Participants who lived in jurisdictions where private dispensaries are authorized to sell cannabis products (e.g., Ontario, British Columbia) did not always feel they could confidently distinguish between an authorized and an unauthorized retailer.
- Being able to distinguish between authorized and unauthorized retailers was deemed easy and obvious by participants who lived in jurisdictions where only government dispensaries exist such as in Atlantic Canada, Quebec, Nunavut, etc.
- Confidence was much lower among all participants when asked if they would be able to distinguish between authorized and unauthorized online retailers.
- Very few participants have ever searched for information about where to purchase legal cannabis products or to help them understand the difference between what is legal and what is not.

Ultimately, those who believe it is important to them that the products they are using come from authorized sources were in the minority. For the most part, participants feel that “cannabis is legal in Canada” and as such it does not matter where they obtain their products.

When shown what a legal cannabis product looks like and what might be a strong sign that a retailer is unauthorized, most participants seemed to feel they were aware of the information presented.

Cannabis source selection key drivers

Price was an important, if not the most important driver, for getting cannabis products from illegal sources. This was especially the case for dry leaf and for edibles.

“Quality” was also an important factor, with many participants describing how the product from their unauthorized source was better in terms of quality of the leaf, THC content,

production process (i.e., they know their source does not use chemicals, pesticides, etc.) and freshness.

Many also described how their “dealer” does a number of things to maximize loyalty and “customer satisfaction” (such as doorstep service, anytime service, the opportunity to see or sample the product, small bonuses or extra product, and no-hassle returns).

Finally, many explained how they use unauthorized sources to obtain products that are not available from authorized sources in their region.

Concerns regarding non-regulated cannabis

Participants did not have any personal health or personal safety concerns with their current non-regulated cannabis products. They trust their sources, which some have been using for numerous years.

Participants explained that since cannabis is now legal in Canada, they are not concerned with any legal consequences, at least not as a “purchaser” of illegal cannabis products. Participants are not convinced that illegal suppliers should be too worried either since they believe that the police is not very strict when it comes to enforcing cannabis laws.

Finally, very few participants see a connection between obtaining cannabis from illegal sources and organized crime.

Qualitative research disclaimer

Qualitative research seeks to develop insight and direction rather than quantitatively projectable measures. The purpose is not to generate “statistics” but to hear the full range of opinions on a topic, understand the language participants use, gauge degrees of passion and engagement and to leverage the power of the group to inspire ideas. Participants are encouraged to voice their opinions, irrespective of whether or not that view is shared by others.

Due to the sample size, the special recruitment methods used, and the study objectives themselves, it is clearly understood that the work under discussion is exploratory in nature. The findings are not, nor were they intended to be, projectable to a larger population.

Specifically, it is inappropriate to suggest or to infer that few (or many) real world users would behave in one way simply because few (or many) participants behaved in this way during the sessions. This kind of projection is strictly the prerogative of quantitative research.

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