



Homegrown Cannabis Survey Report

Pure Sunfarms, October 2020

October 2020 marks the two-year anniversary of legalization of cannabis in Canada. Pure Sunfarms conducted a survey to understand consumer behaviour around current cannabis consumption and perceptions around various characteristics of cannabis, including:

- Understanding consumer behaviour around cannabis consumption
- Understanding consumer awareness and preference for pesticide-free cannabis
- Understanding consumer awareness and preference for BC grown cannabis

Methodology

This national survey was distributed to 1,505 Canadian consumers of legal cannabis consumption age online through an Angus Reid panel. The estimated margin of error for the total sample is +/- 2.5% at a 95% confidence level. The survey took place from September 25 to September 29, 2020.

Reporting Notes:

- In accordance with Cannabis Legalizations and Regulation laws, this survey was administrated to Canadian adults 19 years of age or older who are legally able to access Cannabis across most of the country with the exception of Alberta (18 years of age) and Quebec (21 years of age).
- Not all percentages sum to 100% due to rounding.
- Please note that research is not necessarily predictive of future outcomes and captures opinions for a point in time. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Statistical margins of error are not applicable to online nonprobability sampling polls.
- Statistical significance testing is conducted only on mutually exclusive data.
- Cannabis Consumers: Those who have consumed any form of cannabis within the past year. Cannabis consumers are denoted with the following symbol throughout the report. 🌿
- Total sample data is denoted by the following symbol throughout the report. 🇨🇦
- Where pesticides are noted, they were referenced as chemical pesticides in original survey questions.



Executive Summary

Five key findings were identified through the analysis of survey results:

1. **2 in 5 Canadians (42%) say they have consumed cannabis in the past 12 months.**
2. **While there are many Canadians enjoying cannabis, the majority don't know where or how it is grown.**
3. **British Columbia ranks at the top for the highest quality cannabis in Canada.**
4. **Quality and strong cannabis culture are leading reasons for purchase of cannabis from British Columbia.**
5. **Cannabis consumers are concerned about the use of pesticides and don't want it in their bud.**

Detailed Findings

KEY FINDING 1: 2 IN 5 CANADIANS (42%) SAY THEY HAVE CONSUMED CANNABIS IN THE PAST 12 MONTHS

2 in 5 Canadians (42%) say they have consumed cannabis in the past 12 months. Past year consumption is strongest among males and younger age groups¹.

- Males (46%) vs. females (39%)
- 18-34 years (59%)
- 35-54 years (44%)
- 55+ years (28%)

Most cannabis consumers have smoked bud in the last year while 1 in 3 are smoking weekly².

- Smoking cannabis is most prevalent among cannabis consumers who are 18-34 years old (80%), males (74%) and Quebecers (77%)*
- 69% of cannabis consumers smoked flowers/bud in the past year
- 35% of cannabis consumers smoke flowers/bud weekly

1 Base: Total sample (n=1505)

S4. Have you ever consumed cannabis? When we mention cannabis, we are referring to all cannabis products, including dried flower, oils, edibles, topical creams and lotions, etc. Please indicate the last time you have consumed cannabis, if ever.

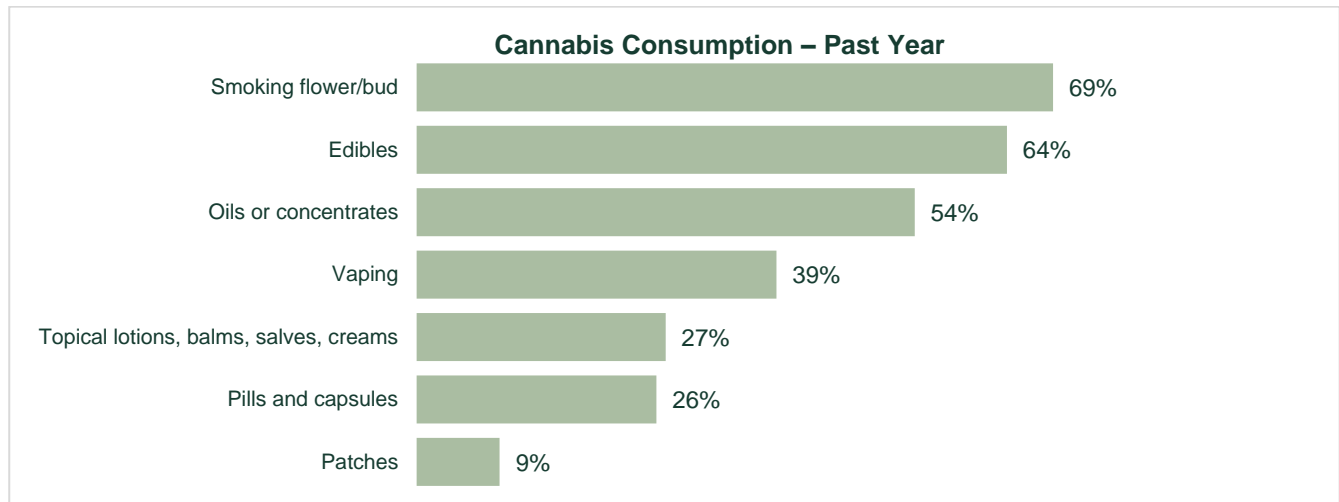
2 Base: Cannabis consumer (n=624)

S6. How often do you consume cannabis? Please indicate how often you consume cannabis in each of the formats listed below.

*based on P12M smoking



Other popular formats include edibles, oils and concentrates, and vaping. Usage of topical lotions, balms and salves, pills and capsules, and patches are the least consumed formats³.



The majority of consumers say they are purchasing from a licensed retailer⁴.

- 81% Licensed retailer
- 39% Non-licensed retailer or alternative supplier
- Ontarians are the least likely to purchase from a licensed retailer (74%) and most likely to purchase from a non-licensed retailer or alternative supplier (47%)

Top reasons for consuming are for recreation, relaxation and to aid with sleep⁵.

- 66% Recreation
- 59% Relaxation
- 52% Sleep
- Those 18-24 years old (90%), Quebecers (73%) and males (72%) are most likely to consume for recreation.

3 Base: Cannabis consumer (n=624)

S6. How often do you consume cannabis? Please indicate how often you consume cannabis in each of the formats listed below.

4 Base: Cannabis consumer (n=624)

Q2. From where do you purchase cannabis? Select all that apply.

5 Base: Cannabis consumer (n=624)

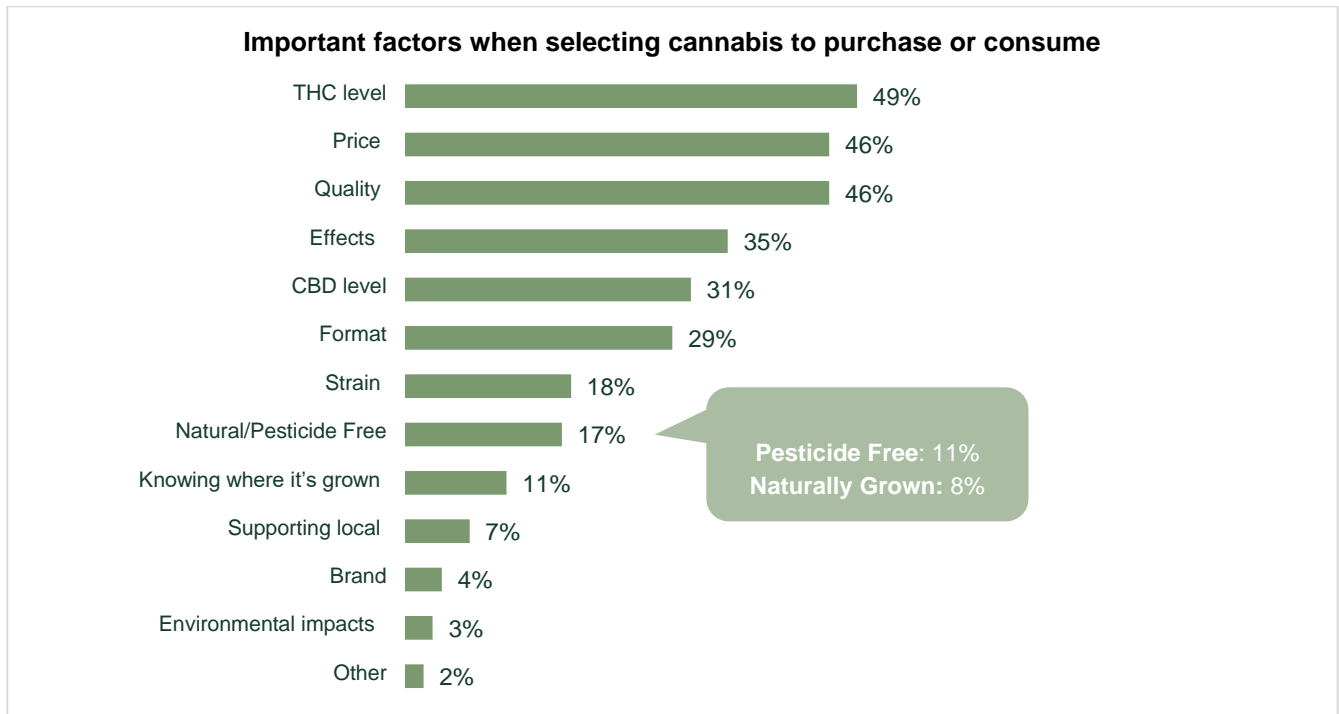
Q1. What are some of the reasons you consume cannabis? Please select all that apply

Recreation includes: "socially", "because I enjoy it" and "for fun"



The most important factors when making a cannabis selection are THC level, price and quality⁶. 🌿

- Being naturally grown or free of pesticides is most important for British Columbians (31%) and those 55+ years old (25%).



⁶ Base: Cannabis consumer (n=624)

Q2a. What factors are most important to you when selecting cannabis to purchase or consume? Please select the top 3 factors that you feel are most important.



KEY FINDING 2: WHILE THERE ARE MANY CANADIANS ENJOYING CANNABIS, THE MAJORITY DON'T KNOW WHERE OR HOW IT IS GROWN.

3 in 4 cannabis consumers want to know about where the weed they consume is from, yet only 1 in 2 actually know⁷.

- 76% of cannabis consumers agree with the statement “I would like to know more about where the cannabis I consume is from”
- 51% of cannabis consumers feel they are “knowledgeable about where the cannabis I consume is grown (e.g. location, region, province)”
- Less than 2 in 5 Canadians (38%) are familiar with where cannabis is grown⁸.
- 25-34-year-olds (49%) and males (44%) are most familiar with where it is grown.

Close to 4 in 5 cannabis consumers want to know about how their cannabis is grown yet 1 in 3 say they don't know⁹.

- 78% of cannabis consumers agree with the statement “I would like to know more about how the cannabis I consume is grown”
- 34% of cannabis consumers say they are not knowledgeable about how cannabis is grown”
- Males (52%), 25-34-year-olds (58%), and Ontarians (51%) are most knowledgeable about how cannabis is grown.

Only 1 in 3 Canadians are knowledgeable about the meaningful differences between various strains of cannabis such as indica, sativa, terpenes, and aromas (35%)¹⁰.

7 Base: Cannabis consumer (n=624)

Q3. How knowledgeable would you say you are with respect to the following:

Q5. Now, we'd like to ask you to answer whether you agree or disagree with the following series of statements

8 Total sample (n=1505)

9 Base: Cannabis consumer (n=624)

Q3. How knowledgeable would you say you are with respect to the following

Q5. Now, we'd like to ask you to answer whether you agree or disagree with the following series of statements.

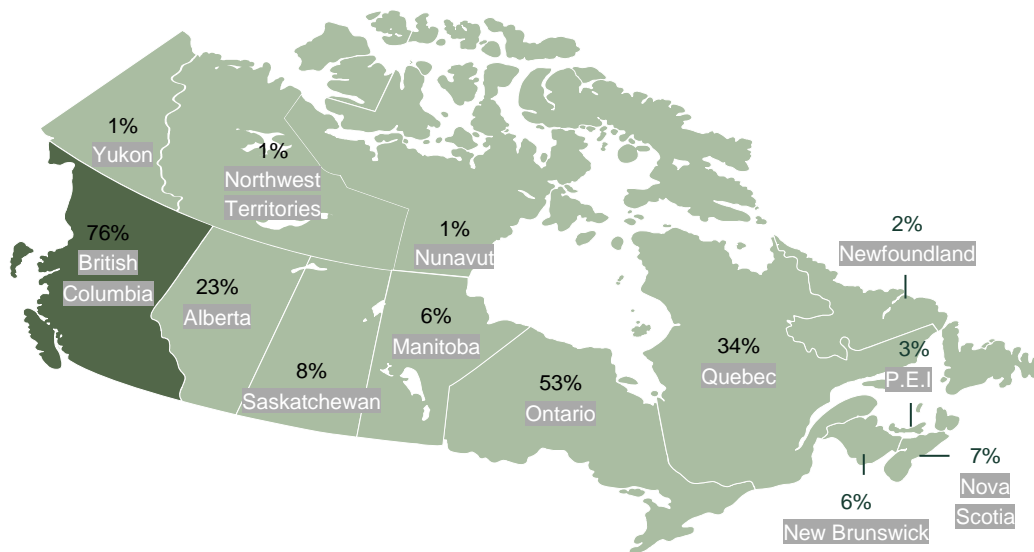
Answers: % Agree = Strongly/somewhat agree (Top 2 Box). % Not Knowledgeable = Not very/Not at all knowledgeable (Bottom 2 Box)

10 Base: Total sample (n=1505)

KEY FINDING 3: BRITISH COLUMBIA RANKS AT THE TOP FOR THE HIGHEST QUALITY CANNABIS IN CANADA

Canadians were asked from where they would be able to purchase the highest quality cannabis, and results show that BC is ranked the highest followed by Ontario, Quebec, and Alberta¹¹.

- This is especially true among younger generations as 82% of 18-24-year-olds and 83% of 25-34-year-olds would choose British Columbia to purchase the highest quality cannabis.



72% agree that BC has the best reputation for growing cannabis in Canada¹².

66% of Cannabis consumers care about where cannabis is grown (e.g. location, region, province)¹³.

53% of Cannabis consumers would prefer to buy cannabis from British Columbia than that grown in other provinces¹⁴.

11 Base: Total sample (n=1505)

Q4. If you were to consider purchasing cannabis in Canada, from which province would you think to find the highest quality cannabis? Please select up to 3 provinces. Please provide your best guess if you are unsure.

12 Base: Total sample (n=1505)

Q5. Now, we'd like to ask you to answer whether you agree or disagree with the following series of statements

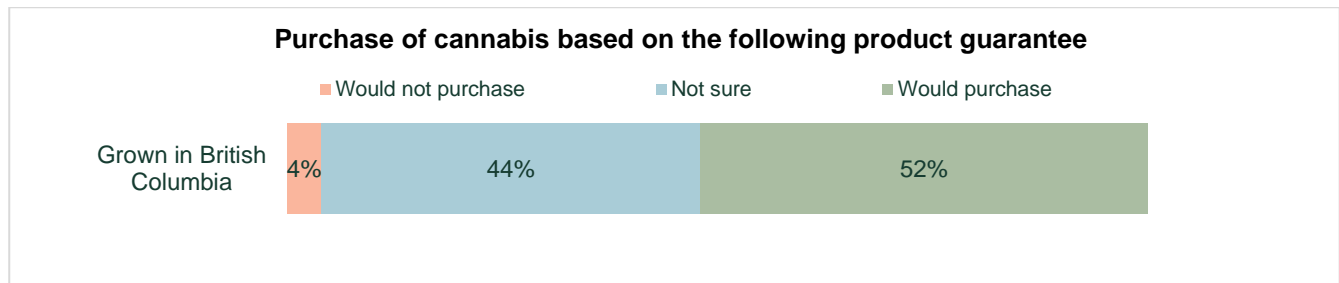
Answers: % Agree = Strongly/somewhat agree (Top 2 Box).

13 + 13 Base: Cannabis consumers (n=624)

Q5. Now, we'd like to ask you to answer whether you agree or disagree with the following series of statements.



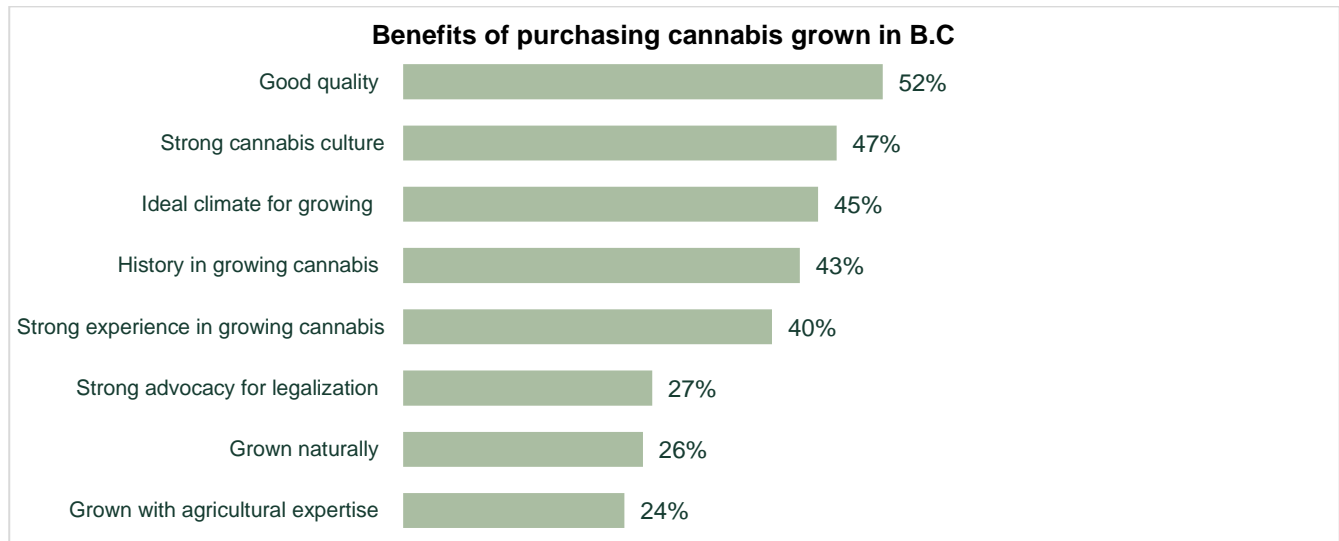
1 in 2 Cannabis consumers would choose to purchase cannabis with the guarantee it was grown in BC¹⁵.



KEY FINDING 4: QUALITY AND STRONG CANNABIS CULTURE ARE LEADING REASONS FOR PURCHASE OF CANNABIS FROM BRITISH COLUMBIA

Good quality and strong cannabis culture are the benefits most associated with purchasing cannabis grown in British Columbia¹⁶.

- 18-24-year-olds (61%) have the strongest association with BC's high-quality cannabis.



15 Base: Cannabis Consumer (n=624)

Q7. Would you choose to purchase cannabis with the following product guarantees?

16 Base: Cannabis consumers (n=624)

Q8. Please indicate what you believe to be the following benefits, if any, of purchasing cannabis grown in British Columbia.




KEY FINDING 5: CANNABIS CONSUMERS ARE CONCERNED ABOUT THE USE OF PESTICIDES AND DON'T WANT IT IN THEIR BUD

8 in 10 cannabis consumers would choose to purchase cannabis grown free of pesticides but only 2 in 5 know if pesticides have been used¹⁷. 

- 80% of respondents indicated they “would choose to purchase cannabis grown without chemical pesticides”
- 40% of respondents felt they were “Knowledgeable of whether cannabis is grown with chemical pesticides”

7 in 10 would be concerned if they discovered pesticides were used to grow cannabis¹⁸. 

- 72% would be concerned if they discovered that chemical pesticides were used to grow the cannabis they or someone they know consumed
- Quebecers (76%) and Ontarians (71%) indicate the greatest concern among all provinces for cannabis grown with chemical pesticides.

Only 58% of cannabis consumers are aware that unregulated cannabis may be grown using chemical pesticides and only 52% are aware that legal cannabis is grown without their use¹⁹. 

- 58% of respondents felt they were knowledgeable of the fact that unregulated cannabis may be grown using chemical pesticides
- 52% of respondents felt they were knowledgeable of the fact that legal (i.e. regulated) cannabis is grown without the use of chemical pesticides
- Among the general population, British Columbians (27%) are least knowledgeable about the fact that unregulated cannabis may be grown using chemical pesticides

65% of Cannabis consumers would choose to purchase cannabis grown with a lower carbon footprint²⁰. 

61% of Cannabis consumers would choose to purchase cannabis cultivated in a way that conserves water²¹. 

17 Base: Cannabis consumer (n=624)

Q3. How knowledgeable would you say you are with respect to the following

Q7. Would you choose to purchase cannabis with the following product guarantees?

Answers: % Knowledgeable = Very/somewhat knowledgeable (Top 2 Box)

18 Base: Cannabis consumer (n=624)

Q6. How concerned would you be if you discovered that you, or someone you know, consumed cannabis that...

Answers: % Concerned = Very/somewhat concerned (Top 2 Box)

19 Base: Cannabis consumer (n=624)

Q3. How knowledgeable would you say you are with respect to the following

Answers: % Knowledgeable = Very/somewhat knowledgeable (Top 2 Box)

20 + 20 Base: Cannabis consumer (n=624)

Q7. Would you choose to purchase cannabis with the following product guarantees?



REGIONAL HIGHLIGHTS: BRITISH COLUMBIA

While numerous British Columbians are enjoying cannabis, many don't know where or how it is grown.

- 39% of British Columbians say they have consumed cannabis in the past 12 months.
 - 1 in 4 (26%) cannabis consumers are smoking cannabis weekly.
- 72% of cannabis consumers in British Columbia want to know about where the weed they consume is from, but only 55% actually know.
- 78% of cannabis consumers in British Columbia want to know about how their cannabis is grown yet more than 1 in 2 British Columbians (56%) say they don't know.

British Columbians are concerned about the use of pesticides and don't want it in their bud.

- In BC, 8 in 10 cannabis consumers (79%) would choose to purchase cannabis grown free of pesticides but only 1 in 5 British Columbians (20%) know if chemical pesticides are used.
- Only 36% of British Columbians are aware that unregulated cannabis may be grown using chemical pesticides and only 27% are aware that legal cannabis is grown without their use.
- 2 in 3 British Columbians (67%) say they would be concerned if they discovered their weed was grown with chemical pesticides.

British Columbia ranks at the top for the highest quality cannabis.

- 98% of British Columbians say you would find the highest quality cannabis in British Columbia.
- 93% of British Columbians agree that British Columbia has the best reputation for growing cannabis in Canada.
- Cannabis consumers in British Columbia care about where their cannabis is grown (77%) and 87% of British Columbians say they would prefer to buy cannabis from BC than other provinces.

REGIONAL HIGHLIGHTS: ALBERTA

Many Albertans are enjoying cannabis, yet a majority don't know where or how it is grown.

- 42% of Albertans say they have consumed cannabis in the past 12 months.
 - 1 in 5 cannabis consumers (21%) are smoking cannabis weekly.
- 66% of cannabis consumers in Alberta want to know about where the weed they consume is from, but only 44% actually know.
- 68% of cannabis consumers in Alberta want to know about how their cannabis is grown yet 1 in 2 Albertans (53%) say they don't know.

Albertans are concerned about the use of pesticides and don't want it in their bud.

- In Alberta, 3 in 4 cannabis consumers (77%) would choose to purchase cannabis grown free of pesticides yet only 1 in 5 Albertans (19%) know if chemical pesticides are used.
- Only 1 in 3 Albertans (32%) are aware that unregulated cannabis may be grown using chemical pesticides. This is among the lowest awareness across provinces.



- Only 31% of Albertans are aware that legal cannabis is grown without the use of pesticides.
- 6 in 10 Albertans (60%) say they would be concerned if they discovered their weed was grown with chemical pesticides.

British Columbia ranks at the top for the highest quality cannabis among Albertans.

- 90% of Albertans say you would find the highest quality cannabis in British Columbia.
- 75% of Albertans agree that British Columbia has the best reputation for growing cannabis in Canada.
- Cannabis consumers in Alberta care about where their cannabis is grown (57%) and 44% of Albertans say they would prefer to buy cannabis from BC than other provinces.

REGIONAL HIGHLIGHTS: ONTARIO

A high number of Ontarians are enjoying cannabis, yet a many don't know where or how it is grown.

- 44% of Ontarians say they have consumed cannabis in the past 12 months.
 - 36% of cannabis consumers are smoking cannabis weekly.
- 75% of cannabis consumers in Ontario want to know about where the weed they consume is from, but only 51% actually know.
- 76% of cannabis consumers in Ontario want to know about how their cannabis is grown yet 1 in 2 Ontarians (49%) say they don't know.

Ontarians are concerned about the use of pesticides and don't want it in their bud.

- In Ontario, 8 in 10 cannabis consumers (82%) would choose to purchase cannabis grown free of pesticides but only 1 in 4 Ontarians (26%) know if chemical pesticides are used.
- Only 4 in 10 Ontarians (41%) are aware that unregulated cannabis may be grown using chemical pesticides and only 36% are aware that legal cannabis is grown without their use.
- 7 in 10 Ontarians (71%) say they would be concerned if they discovered their weed was grown with chemical pesticides.

British Columbia ranks at the top for the highest quality cannabis among Ontarians

- 79% of Ontarians say they would find the highest quality cannabis in British Columbia.
- 71% of Ontarians agree that British Columbia has the best reputation for growing cannabis in Canada.
- Cannabis consumers in Ontario care about where their cannabis is grown (68%) and 40% of Ontarians say they would prefer to buy cannabis from BC than other provinces.