DETAILED RESULTS

MEDICAL CANNABIS PATIENT SURVEY
1,000 EXTERNAL SURVEY RESPONDENTS

CONDUCTED FOR MEDICAL CANNABIS CANADA

RESEARCH AND ANALYSIS FROM CANADA’S LEADING PUBLIC AFFAIRS AND MARKET RESEARCH EXPERTS
THANK YOU!

Thank you to the team of patients who helped develop the survey questions and provided input along the way.

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<table>
<thead>
<tr>
<th>PART 1: USAGE STATE OF PLAY</th>
<th>SLIDE 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>PART 2: BARRIERS IN THE MEDICAL SYSTEM</td>
<td>SLIDE 13</td>
</tr>
<tr>
<td>PART 3: IMPACT OF BARRIERS</td>
<td>SLIDE 19</td>
</tr>
<tr>
<td>PART 4: SUPPORT FOR POLICY CHANGES</td>
<td>SLIDE 22</td>
</tr>
</tbody>
</table>
The survey was conducted among two separate populations.

The first was a sample of 1,000 medical cannabis patients from July 28 to August 1, 2020. A random sample of panelists were invited to complete the survey from a set of partner panels based on the Lucid exchange platform. These partners are typically double opt-in survey panels, blended to manage out potential skews in the data from a single source.

The margin of error for a comparable probability-based random sample of the same size is +/- 3.08%, 19 times out of 20.

Results from this sample are what is highlighted in the following report.

The second was a sample of MCC members. 1,785 members completed the survey from July 30th to August 14th. Members were invited by email to complete the survey. Member data is not included in analysis within this report. For additional insights on the results of the member sample, please visit Patientaccess.ca/Survey.
PART 1: USAGE STATE OF PLAY

• Just over half of medical cannabis patients are relatively new to the treatment, having used cannabis for medical purposes for three years or less.

• The most common symptoms patients manage with their medical cannabis are sleeping problems, general stress, and chronic physical pain. The most common conditions are anxiety disorder, depression, and insomnia.

• Just over a third have a medical document. These are most common among patients in Alberta.
  • Cannabis clinics are the most frequented source for a medical document (31%), followed by in-person or online from a physician’s office (26%).

• The majority of those who have had a medical document (74%) go to a healthcare practitioner or a pharmacist for guidance on cannabis use for medical purposes, compared to only 24% of those who have never had a medical document. The majority of patients who have never had a medical document go to friends and family, websites, and retail salespeople or “budtenders” at recreational cannabis stores for guidance on their medical cannabis use.
KEY FINDINGS – STATE OF PLAY

LENGTH OF USE FOR MEDICAL PURPOSES

- 6 months or less: 10%
- 6 months to a year: 21%
- 1 to 3 years: 40%
- 4 to 5 years: 13%
- 6 to 10 years: 10%
- Over 10 years: 6%

AVERAGE AMOUNT SPENT

HAD A MEDICAL DOCUMENT

- AVERAGE AMOUNT SPENT OUT OF POCKET ON MEDICAL CANNABIS A MONTH = $159.10

NEVER HAD A MEDICAL DOCUMENT

- AVERAGE AMOUNT SPENT OUT OF POCKET ON MEDICAL CANNABIS A MONTH = $118.10

SOURCE - PAST YEAR

- At a legal recreational store (online or in-person): 58%
- Directly from a legal licensed medical seller/producer (mail order): 44%
- Informally through a friend, family, acquaintance or dealer: 33%
- Through an unregulated cannabis dispensary or compassion club (Online or in-person): 24%
- Grown cannabis at home: 14%
- Grown cannabis via a designated grower or caregiver: 4%

MEDICAL DOCUMENTATION

- No, never had one: 50%
- No, it is now expired: 13%
- Yes: 37%
What symptoms/conditions are you using cannabis to manage? Please select all that apply.

**SYMPTOMS**
- Problems sleeping: 61%
- General stress: 51%
- Chronic physical pain: 50%
- Feelings of depression: 38%
- Acute physical pain: 28%
- Headaches/migraines: 26%
- Muscle spasms: 19%
- Reduce/manage other medication use: 16%

**CONDITIONS**
- Anxiety disorders: 45%
- Depression: 39%
- Insomnia: 37%
- Arthritis: 25%
- Other mental health conditions: 15%
- PTSD: 15%
JUST OVER A THIRD CURRENTLY HAVE A MEDICAL DOCUMENT

Do you have a medical document for medical cannabis from a health care practitioner (physician or nurse practitioner)?

- 37% Currently have a medical document
- 13% Had one but it's expired
- 50% Never had one

% who have a medical document:
- 29%
- 52%
- 34%
- 38%
- 26%
- 41%
CANNABIS CLINICS ARE THE MOST FREQUENTED SOURCE FOR A MEDICAL DOCUMENT

Where did you obtain your medical document for cannabis? [Those who have a medical document]

- IN-PERSON AT A CANNABIS CLINIC: 31%
- IN-PERSON OR ONLINE FROM MY FAMILY PHYSICIAN’S OFFICE: 26%
- ONLINE FROM A CANNABIS CLINIC: 19%
- IN-PERSON OR ONLINE FROM MY SPECIALIST: 15%
- IN-PERSON AT A WALK-IN CLINIC: 9%
PATIENTS WHO HAVE HAD MEDICAL DOCUMENT REPORT HIGHER ENGAGEMENT WITH HCPS

Which of the following sources do you go to for guidance on cannabis use for medical purposes? Select all that apply.

<table>
<thead>
<tr>
<th>Source</th>
<th>MEDICAL DOCUMENT</th>
<th>NO MEDICAL DOCUMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare practitioner at a cannabis clinic</td>
<td>49%</td>
<td>7%</td>
</tr>
<tr>
<td>Healthcare practitioner at a medical clinic</td>
<td>43%</td>
<td>15%</td>
</tr>
<tr>
<td>Websites</td>
<td>38%</td>
<td>51%</td>
</tr>
<tr>
<td>Patient educator at a cannabis clinic/ licensed producer</td>
<td>29%</td>
<td>9%</td>
</tr>
<tr>
<td>Friend or family members</td>
<td>26%</td>
<td>36%</td>
</tr>
<tr>
<td>Budtender</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Online support groups</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Pharmacist</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Books/magazines</td>
<td>6%</td>
<td>13%</td>
</tr>
</tbody>
</table>
REDUCED USE OF OTHER MEDICATIONS THROUGH INCREASED CANNABIS USE

Have you been able to reduce the use of any of the following types of medications you previously used, through increased cannabis use? Please select all that apply.

<table>
<thead>
<tr>
<th>Medication Type</th>
<th>Medical Document</th>
<th>No Medical Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anti-inflammatories</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Opioid pain relievers</td>
<td>33%</td>
<td>18%</td>
</tr>
<tr>
<td>Non-opioid pain relievers</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>Anti-depressants</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Sedatives/Tranquilizers</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Cannabis use has not changed use of other medicines 24% 32%
PART 2: BARRIERS IN THE MEDICAL SYSTEM

• Cost is seen to be one of the biggest barriers to accessing cannabis for medical purposes and was reported as the main reason patients switch sources.

• Despite over 40% using compassionate pricing from licensed medical sellers, those who have had a medical document reported spending around $160 a month out of pocket on their treatment, 34% higher than those who have never had a medical document.

• Legal recreational stores and direct access from licensed sellers through the medical system are seen to be the least affordable.

• 83% say they feel stigma in the medical system regarding cannabis use, and 57% say they find it hard to find a healthcare provider to speak to about their medical cannabis use.
**LEGAL SOURCES FOR PURCHASE RANKED AS LEAST AFFORDABLE**

Thinking about the following sources of medical cannabis are each of the following...

<table>
<thead>
<tr>
<th>Source</th>
<th>Very/ Somewhat Affordable</th>
<th>Not That/ At All Affordable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grown cannabis at home</td>
<td>81%</td>
<td>19%</td>
</tr>
<tr>
<td>Informally through a friend, family, acquaintance or dealer</td>
<td>82%</td>
<td>18%</td>
</tr>
<tr>
<td>Through an unregulated cannabis dispensary or compassion club (online or in-person)</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Grown cannabis via a designated grower or caregiver</td>
<td>71%</td>
<td>29%</td>
</tr>
<tr>
<td>Directly from a legal licensed producer (mail order)</td>
<td>59%</td>
<td>41%</td>
</tr>
<tr>
<td>At a legal recreational store (online or in-person)</td>
<td>57%</td>
<td>43%</td>
</tr>
</tbody>
</table>

**MOST AFFORDABLE**
MOST IMPORTANT REASON FOR CHANGE IN SOURCE IS **COST** – MORE AFFORDABLE PRODUCTS WERE FOUND ELSEWHERE

And what was the most important reason you switched?

44%  
**Cost** – More affordable somewhere else

27%  
Ease of access – Easier to access elsewhere

16%  
Variety – More variety somewhere else

9%  
Products used were no longer offered
PATIENTS WHO HAVE HAD A MEDICAL DOCUMENT REPORT GREATER IMPACT FROM PANDEMIC

Has the COVID-19 pandemic had any of the following impacts on your cannabis purchasing? Select all that apply.

<table>
<thead>
<tr>
<th>Impact</th>
<th>MEDICAL DOCUMENT</th>
<th>NO MEDICAL DOCUMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>It takes longer to access medical cannabis</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>It is more expensive to access medical cannabis</td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td>It is harder to access medical cannabis</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>I have changed where I purchase my medical cannabis</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Some other impact</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>It has had no impact at all</td>
<td>47%</td>
<td>68%</td>
</tr>
</tbody>
</table>
I feel there is **stigma** about medical cannabis use, among medical professionals (outside cannabis clinics).

It is very **hard** for me to find a healthcare practitioner to speak to about obtaining a medical document for cannabis.
ONLY AROUND 1 IN 3 WHO NEVER HAD A MEDICAL DOCUMENT FEEL SUPPORTED BY HCPS IN TRADITIONAL MEDICAL SYSTEM

“I feel supported by healthcare practitioners in the traditional medical system (not cannabis clinics), about my medical cannabis use.”
PART 3: IMPACT OF BARRIERS

• 60% say they feel like they have to access medical cannabis from the unregulated market because the regulated system poses too many challenges (cost, authorization, navigating the structure).

• 72% of medical cannabis patients say medical cannabis use has decreased reliance on traditional medication. 1 in 4 reported decreased reliance on opioid pain relievers, but 36% of these patients report barriers to accessing cannabis led them to return to these medications.

• Among those who don’t have a medical document, two-thirds also say it’s because the medical cannabis system seems unclear, and similar numbers say if they chose to access through the medical system it would increase the costs of their medical cannabis.
BARRIERS TO THE LEGAL SYSTEM: MEDICAL DOCUMENTATION

I DON’T HAVE MEDICAL DOCUMENTATION BECAUSE...

...I don’t think I need it/it wouldn’t change anything

78% “Agree”

37% 41% 14% 8%

...I’m not sure how the medical cannabis system works

66% “Agree”

28% 37% 20% 15%

...It would be more expensive to try and access cannabis through the medical system

64% “Agree”

28% 36% 27% 10%
1 IN 3 HAVE RETURNED TO THE USE OF OPIOIDS DUE TO BARRIERS

And have barriers to accessing cannabis for any reason led you to return to any of those medications?

<table>
<thead>
<tr>
<th>% OF THOSE THAT RETURNED TO MEDICATIONS DUE TO BARRIERS ACCESSING CANNABIS</th>
<th>HAD MEDICAL DOCUMENT</th>
<th>NEVER HAD A MEDICAL DOCUMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANTI-INFLAMMATORY</td>
<td>40%</td>
<td>22%</td>
</tr>
<tr>
<td>OPIOID PAIN RELIEVERS</td>
<td>40%</td>
<td>31%</td>
</tr>
<tr>
<td>NON-OPIOID PAIN RELIEVERS</td>
<td>39%</td>
<td>26%</td>
</tr>
<tr>
<td>ANTI-DEPRESSANTS</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>SEDATIVES/TRANQUILIZERS</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>OTHER</td>
<td>10%</td>
<td>13%</td>
</tr>
</tbody>
</table>

ABACUS DATA
There is wide-spread support for all of the policy issues tested. Support is strongest for the elimination of the excise duty/PST (in applicable provinces), however each suggest policy received support from more than 75% of medical cannabis patients.
## MAJORITY OF PATIENTS SUPPORT GOVERNMENT POLICY CHANGE

The following are some potential government policies. For each, is this something that you are...

<table>
<thead>
<tr>
<th>Policy</th>
<th>Very/ Somewhat Supportive</th>
<th>Not That/At All Supportive</th>
<th>NET</th>
</tr>
</thead>
<tbody>
<tr>
<td>The elimination of excise duty and HST/GST/PST (in applicable provinces) on medical cannabis</td>
<td>92%</td>
<td>8%</td>
<td>83</td>
</tr>
<tr>
<td>Pharmacies being able to dispense medical cannabis</td>
<td>90%</td>
<td>10%</td>
<td>80</td>
</tr>
<tr>
<td>Pharmacists being able to provide medical guidance on cannabis use and risk</td>
<td>92%</td>
<td>8%</td>
<td>84</td>
</tr>
<tr>
<td>The elimination of the 10mg THC/unit limit for edible cannabis and ingested extracts</td>
<td>78%</td>
<td>22%</td>
<td>57</td>
</tr>
</tbody>
</table>
IMPACT OF REMOVAL OF EXCISE DUTY TAX/PST FROM MEDICAL CANNABIS

If the excise duty tax/PST (in applicable provinces) was removed from medical cannabis do you think this would... Please select all that apply

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduce the costs of your medical cannabis</td>
<td>58%</td>
</tr>
<tr>
<td>Make it easier for you to access medical cannabis</td>
<td>32%</td>
</tr>
<tr>
<td>Reduce your use of the unregulated market</td>
<td>28%</td>
</tr>
<tr>
<td>Help legitimize medical cannabis use</td>
<td>26%</td>
</tr>
<tr>
<td>Reduce your use of the recreational market</td>
<td>23%</td>
</tr>
<tr>
<td>Encourage you to speak with a healthcare practitioner about medical cannabis use</td>
<td>18%</td>
</tr>
<tr>
<td>Wouldn’t change much</td>
<td>23%</td>
</tr>
</tbody>
</table>

77% identify a benefit of removing the excise duty tax in applicable provinces
If you were able to ask a pharmacist for medical guidance on cannabis use do you think it would... Please select all that apply

- Help legitimize medical cannabis use: 43%
- Make it easier for you to access medical cannabis: 37%
- Encourage you to speak with a healthcare practitioner about medical cannabis use: 36%
- Reduce the costs of your medical cannabis: 24%
- Reduce your use of the unregulated market: 23%
- Reduce your use of the recreational market: 18%
- Wouldn’t change much: 31%

Identify a benefit of asking pharmacists for medical guidance on cannabis use