



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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METHODOLOGY

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.

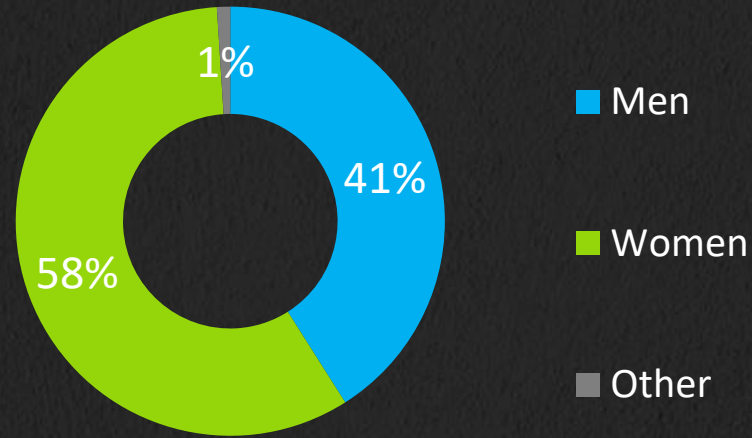
Results from this sample are what is highlighted in the following report.

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

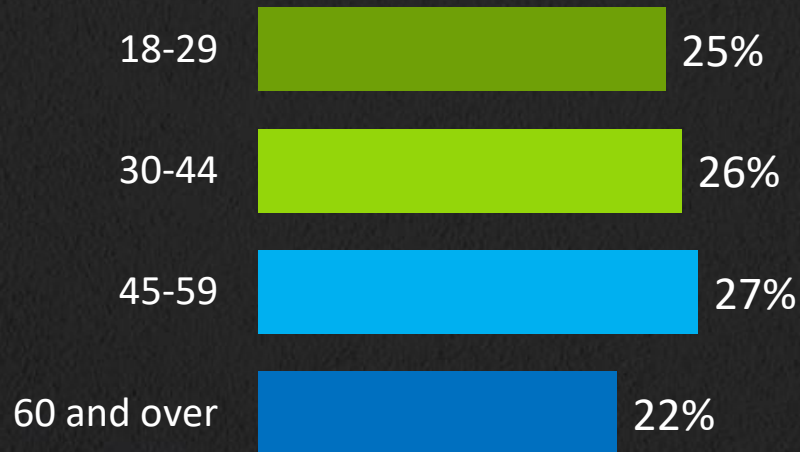


SURVEY DEMOGRAPHICS

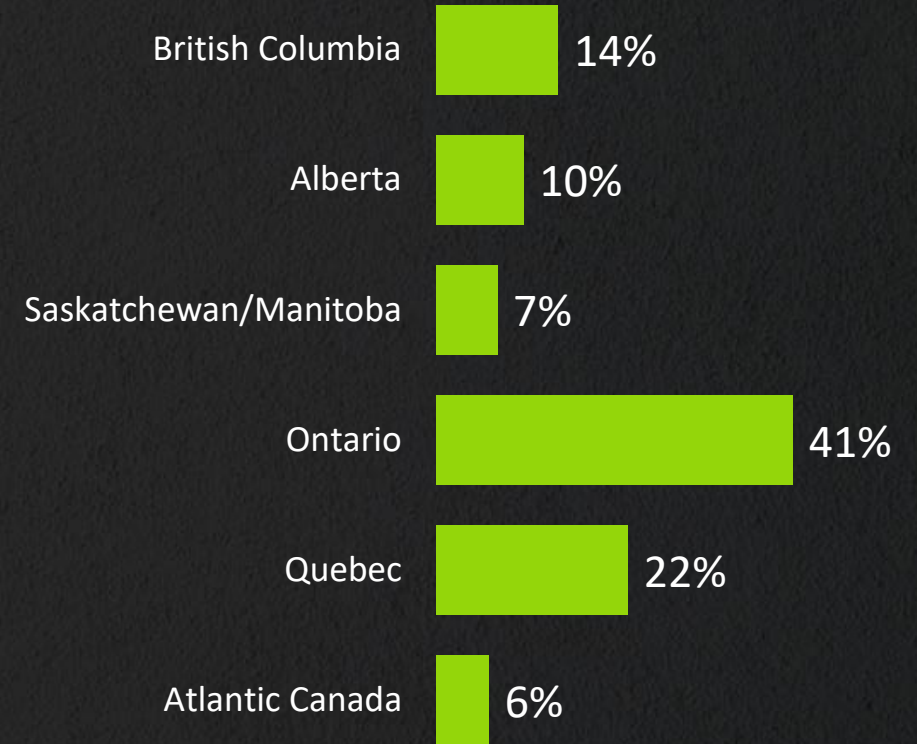
GENDER



AGE GROUP



REGION



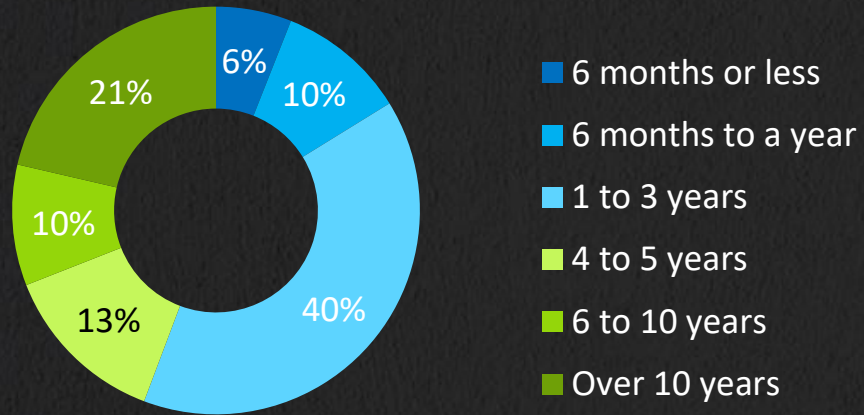
* Raw data proportions

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



AVERAGE AMOUNT SPENT

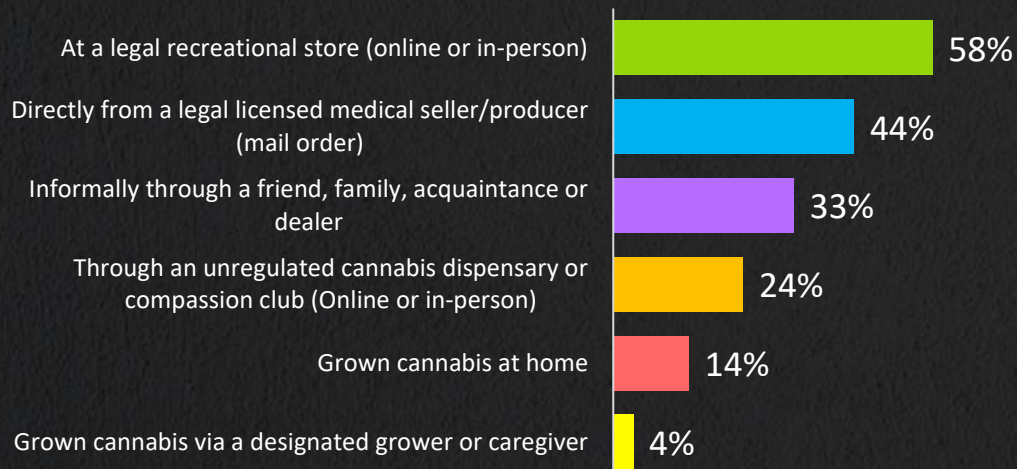
HAD A MEDICAL DOCUMENT

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

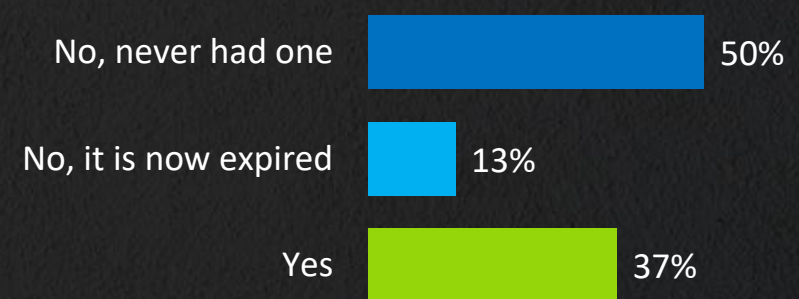
NEVER HAD A MEDICAL DOCUMENT

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

SOURCE- PAST YEAR

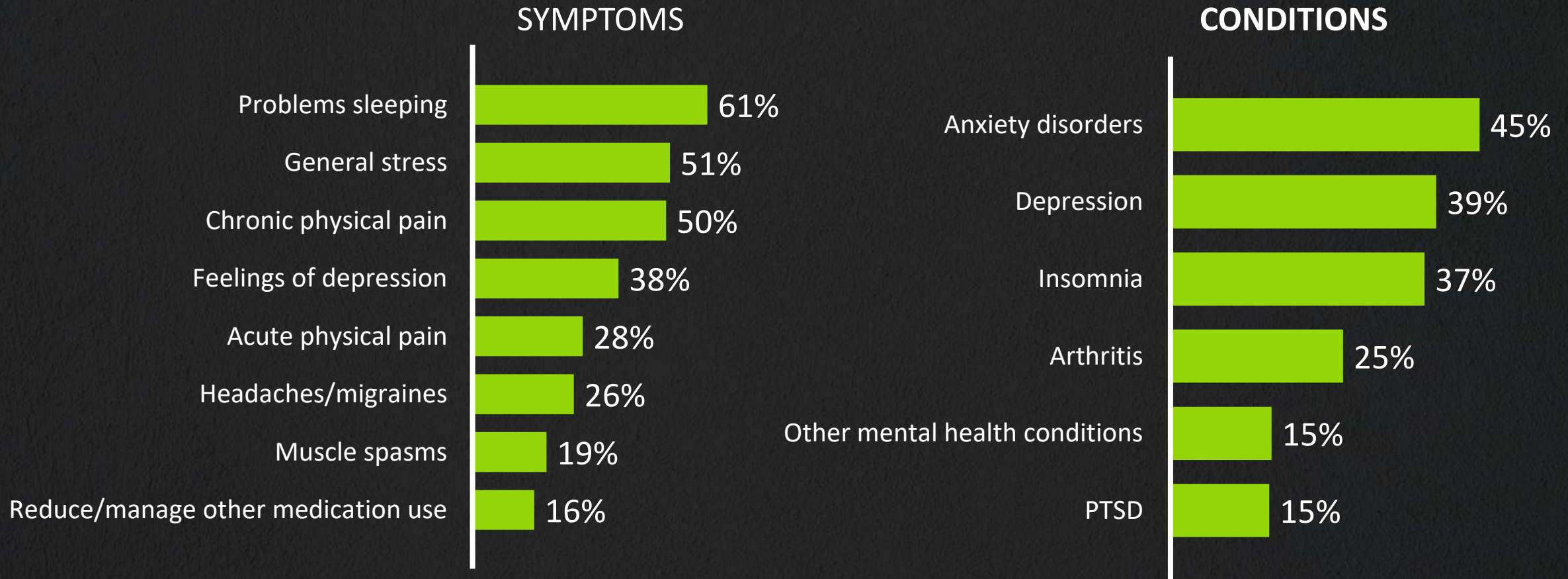


MEDICAL DOCUMENTATION



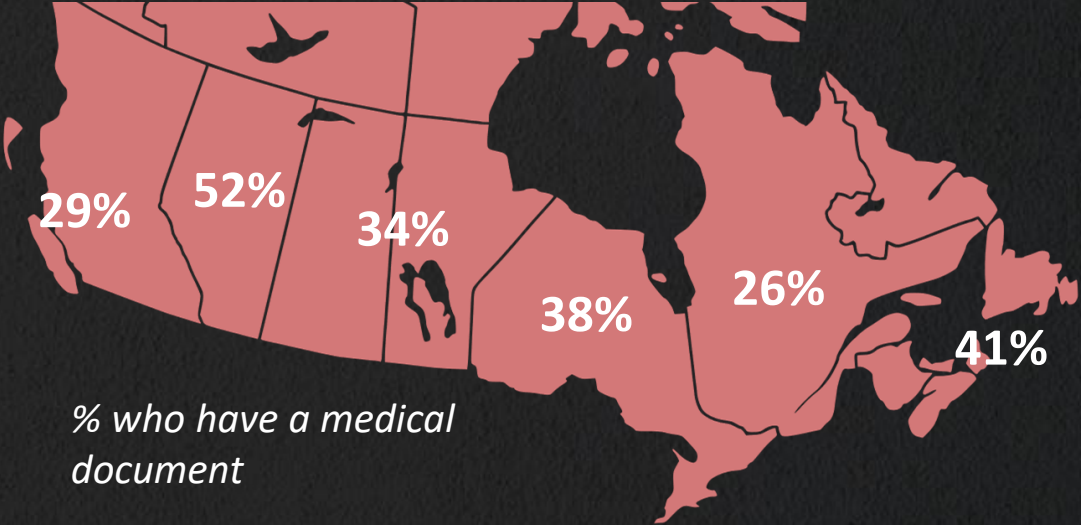
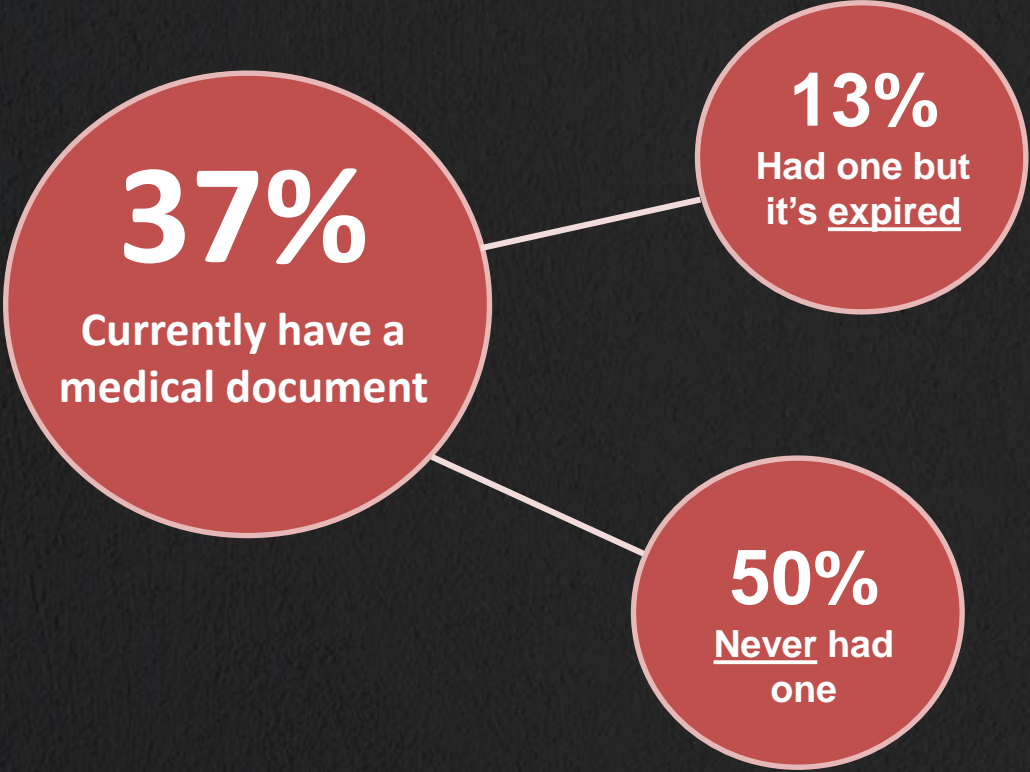
SYMPTOMS AND CONDITIONS USING CANNABIS TO MANAGE

What symptoms/conditions are you using cannabis to manage? Please select all that apply



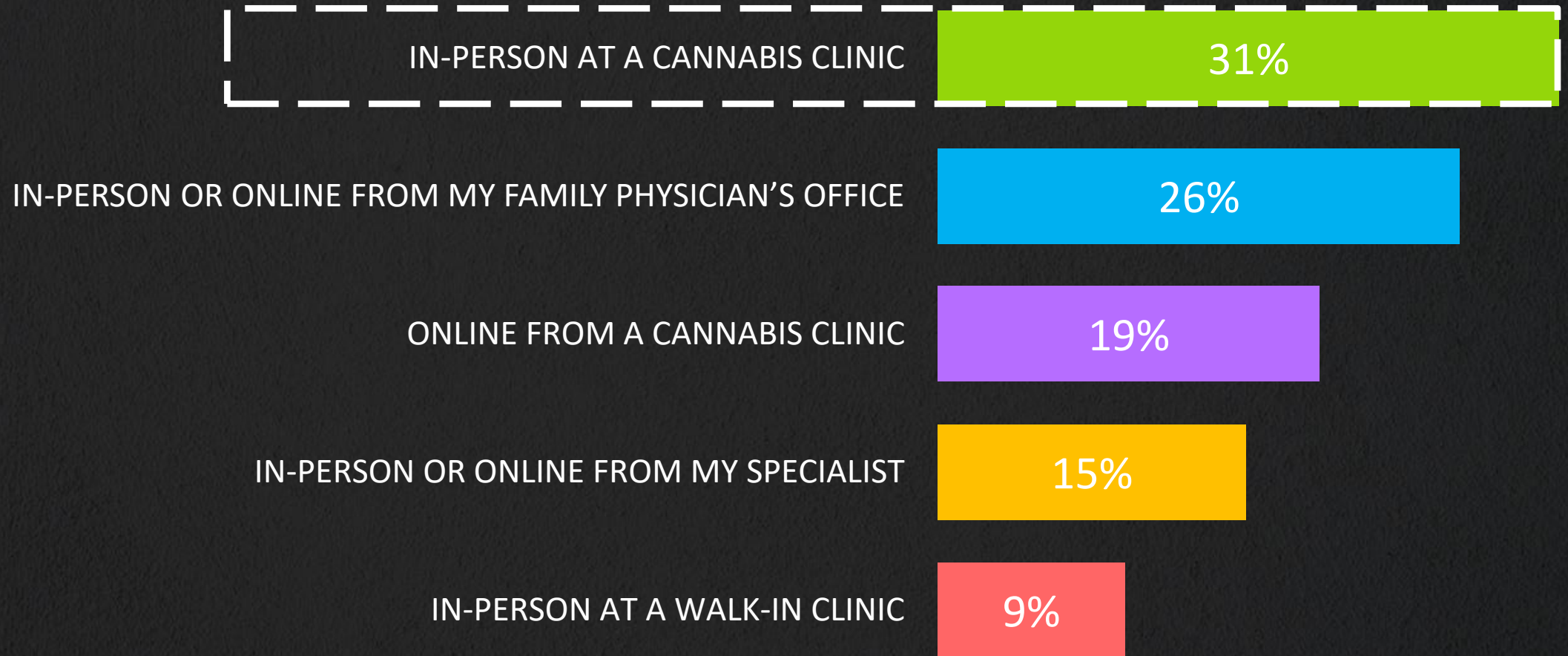
JUST OVER A THIRD CURRENTLY HAVE A MEDICAL DOCUMENT

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



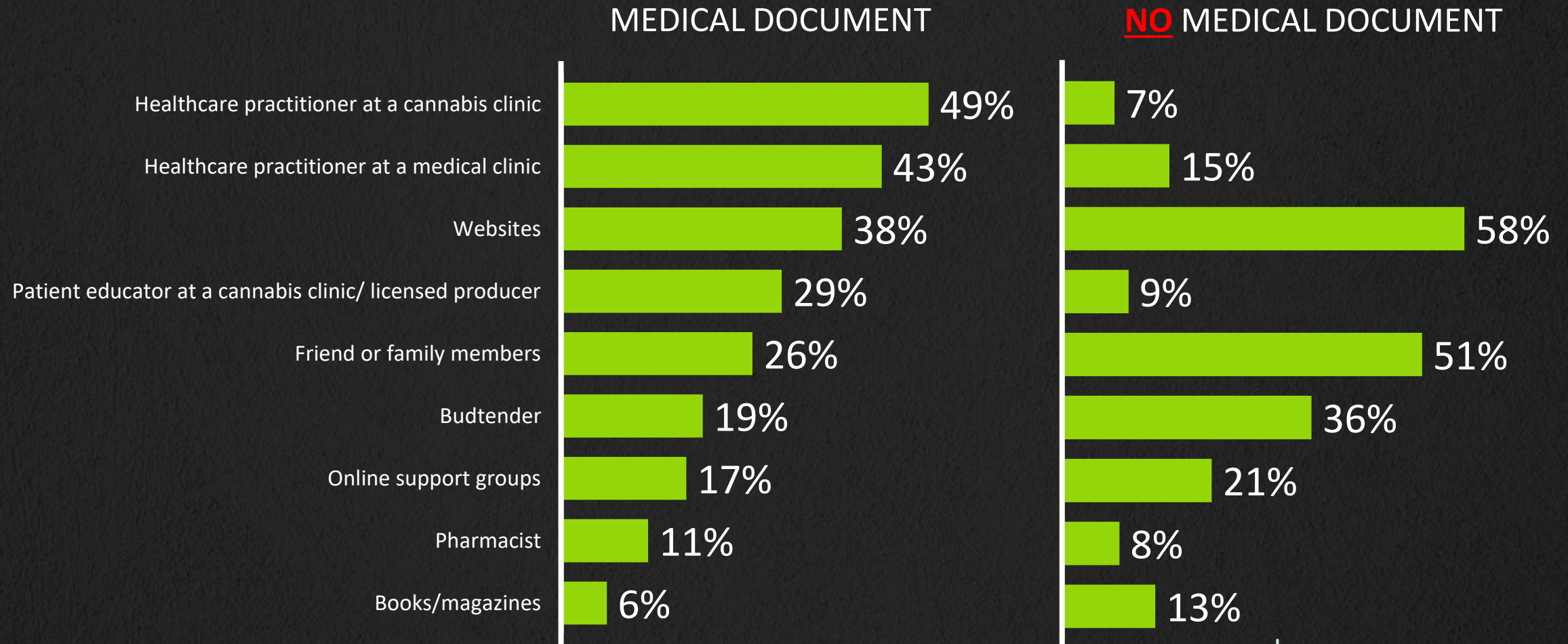
CANNABIS CLINICS ARE THE MOST FREQUENTED SOURCE FOR A MEDICAL DOCUMENT

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



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.

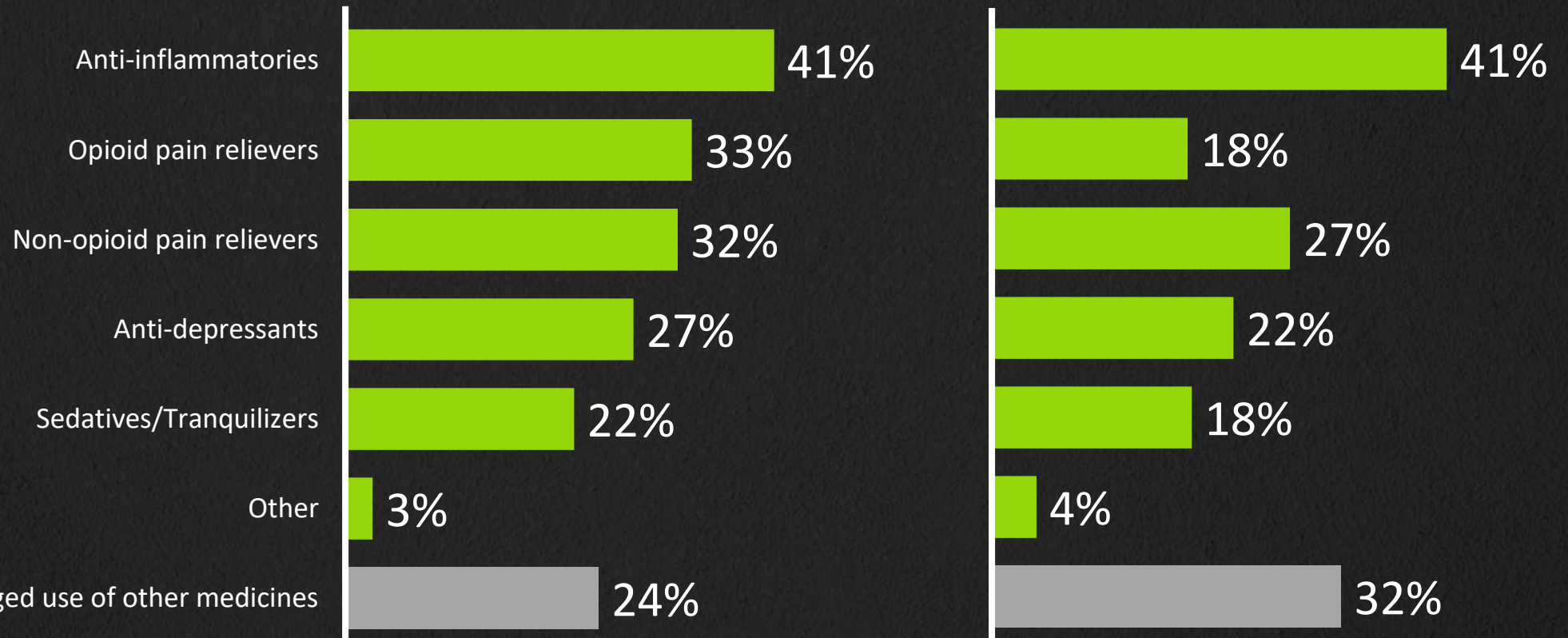


REDUCED USE OF OTHER MEDICATIONS THROUGH INCREASED CANNABIS USE

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.

MEDICAL DOCUMENT

NO MEDICAL DOCUMENT



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...

**MOST
AFFORDABLE**

	VERY/ SOMEWHAT AFFORDABLE	NOT THAT/ AT ALL AFFORDABLE
GROWN CANNABIS AT HOME	81%	19%
INFORMALLY THROUGH A FRIEND, FAMILY, ACQUAINTANCE OR DEALER	82%	18%
THROUGH AN UNREGULATED CANNABIS DISPENSARY OR COMPASSION CLUB (ONLINE OR IN-PERSON)	73%	27%
GROWN CANNABIS VIA A DESIGNATED GROWER OR CAREGIVER	71%	29%
DIRECTLY FROM A LEGAL LICENSED PRODUCER (MAIL ORDER)	59%	41%
AT A LEGAL RECREATIONAL STORE (ONLINE OR IN-PERSON)	57%	43%

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%



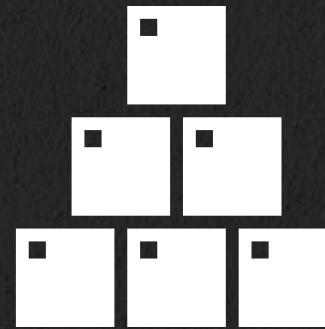
Cost – More affordable somewhere else

27%



Ease of access – Easier to access elsewhere

16%



Variety – More variety somewhere else

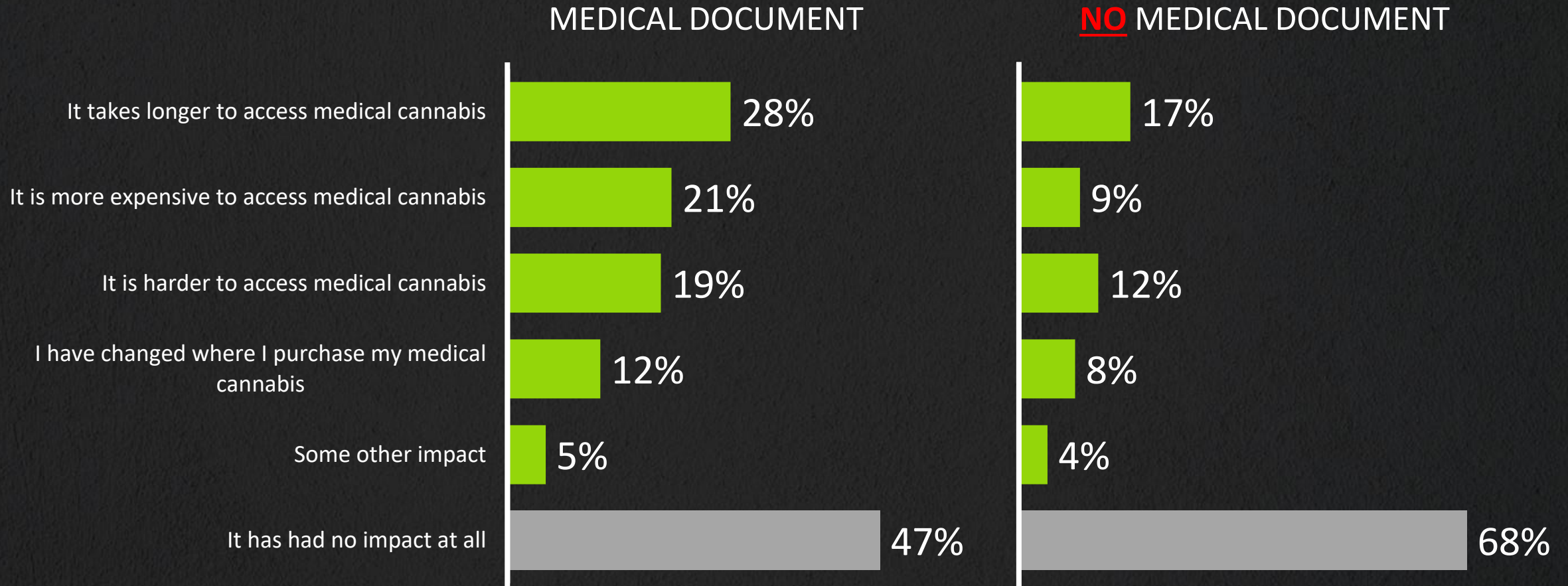
9%



Products used were no longer offered

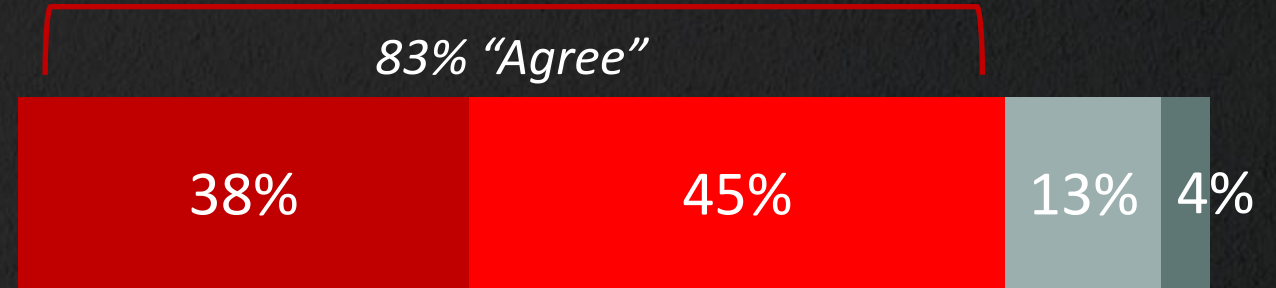
PATIENTS WHO HAVE HAD A MEDICAL DOCUMENT REPORT GREATER IMPACT FROM PANDEMIC

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

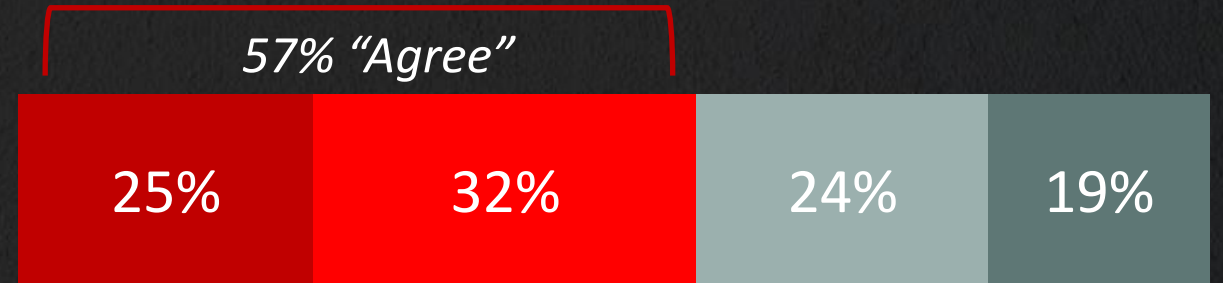


MOST RECOGNIZE STIGMA, IDENTIFY DIFFICULTIES FINDING SUPPORT IN THE TRADITIONAL MEDICAL SYSTEM

I feel there is **stigma** about medical cannabis use, among medical professionals (outside cannabis clinics)

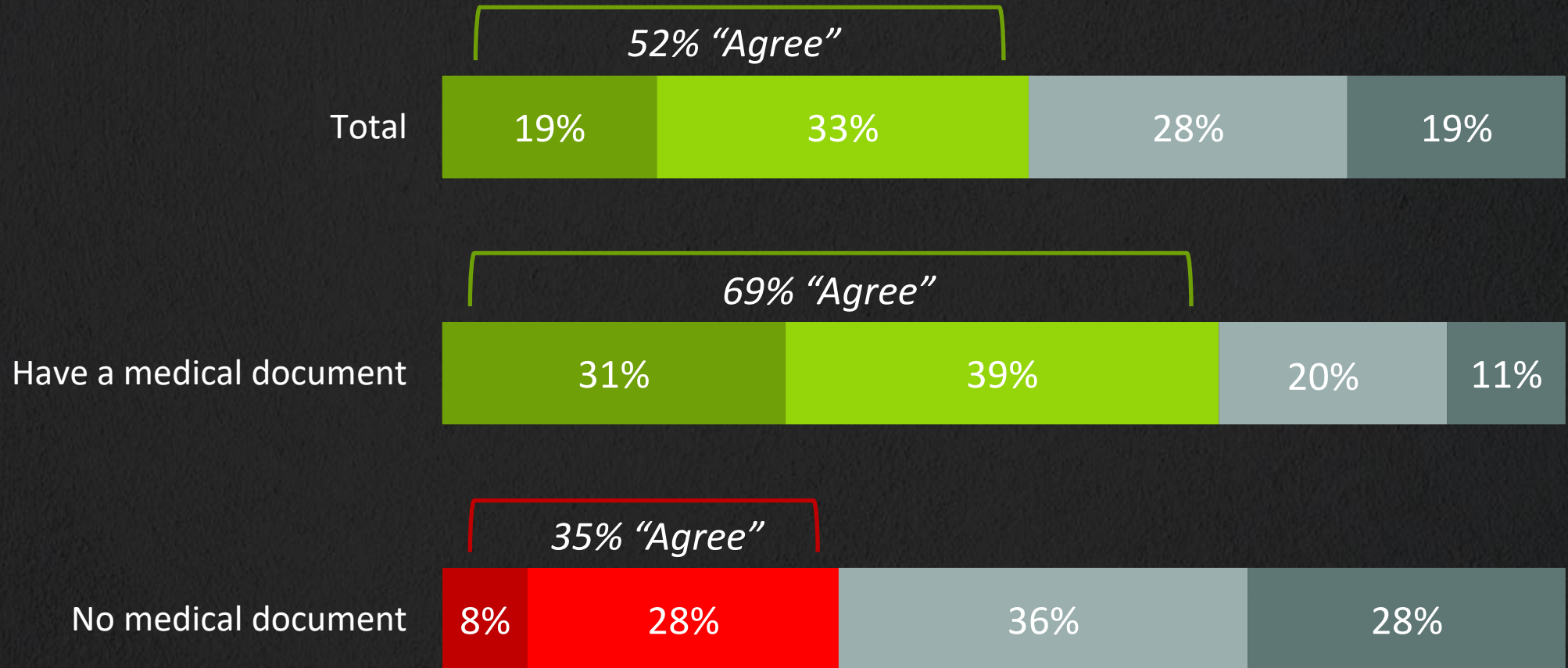


It is very **hard** for me to find a healthcare practitioner to speak to about obtaining a medical document for cannabis



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."

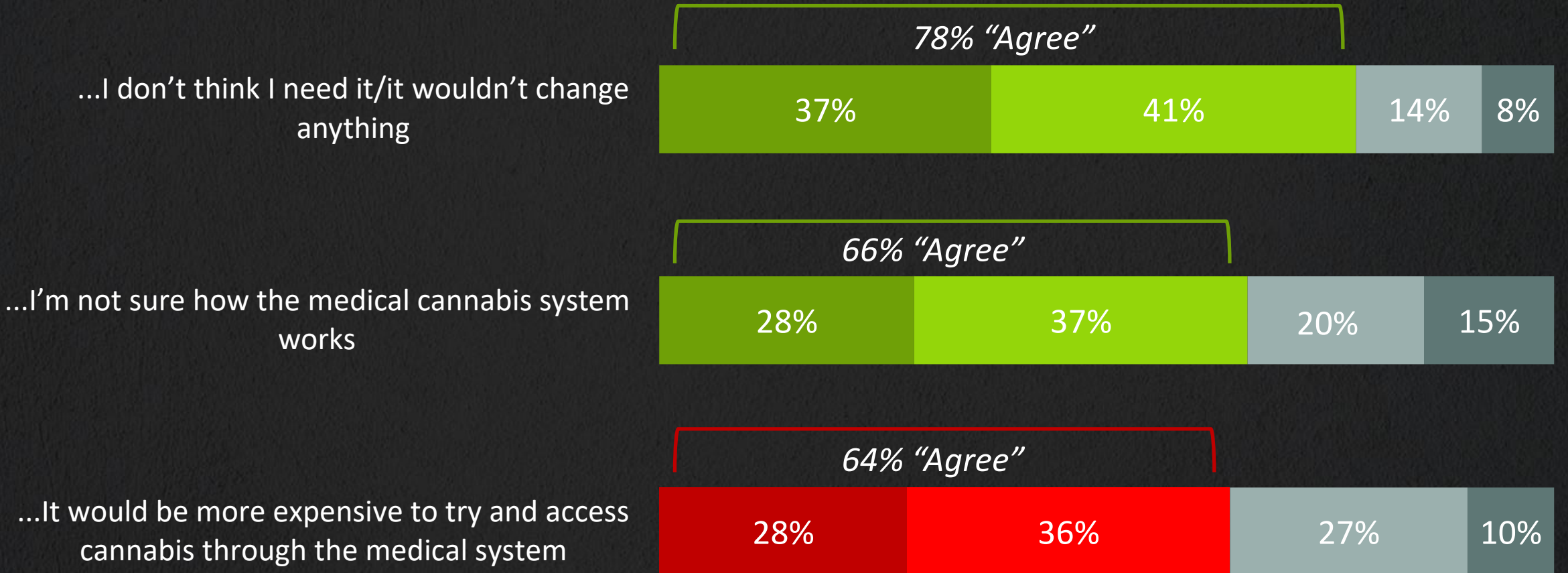


PART 3: IMPACT OF BARRIERS

- **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...



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?

<i>% OF THOSE THAT RETURNED TO MEDICATIONS DUE TO BARRIERS ACCESSING CANNABIS</i>	HAD MEDICAL DOCUMENT	<u>NEVER HAD A</u> MEDICAL DOCUMENT
ANTI-INFLAMMATORIES	40%	22%
OPIOID PAIN RELIEVERS	40%	31%
NON-OPIOID PAIN RELIEVERS	39%	26%
ANTI-DEPRESSANTS	28%	21%
SEDATIVES/TRANQUILIZERS	22%	22%
OTHER	10%	13%

PART 4: SUPPORT FOR POLICY CHANGES

- **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 is something that you are...

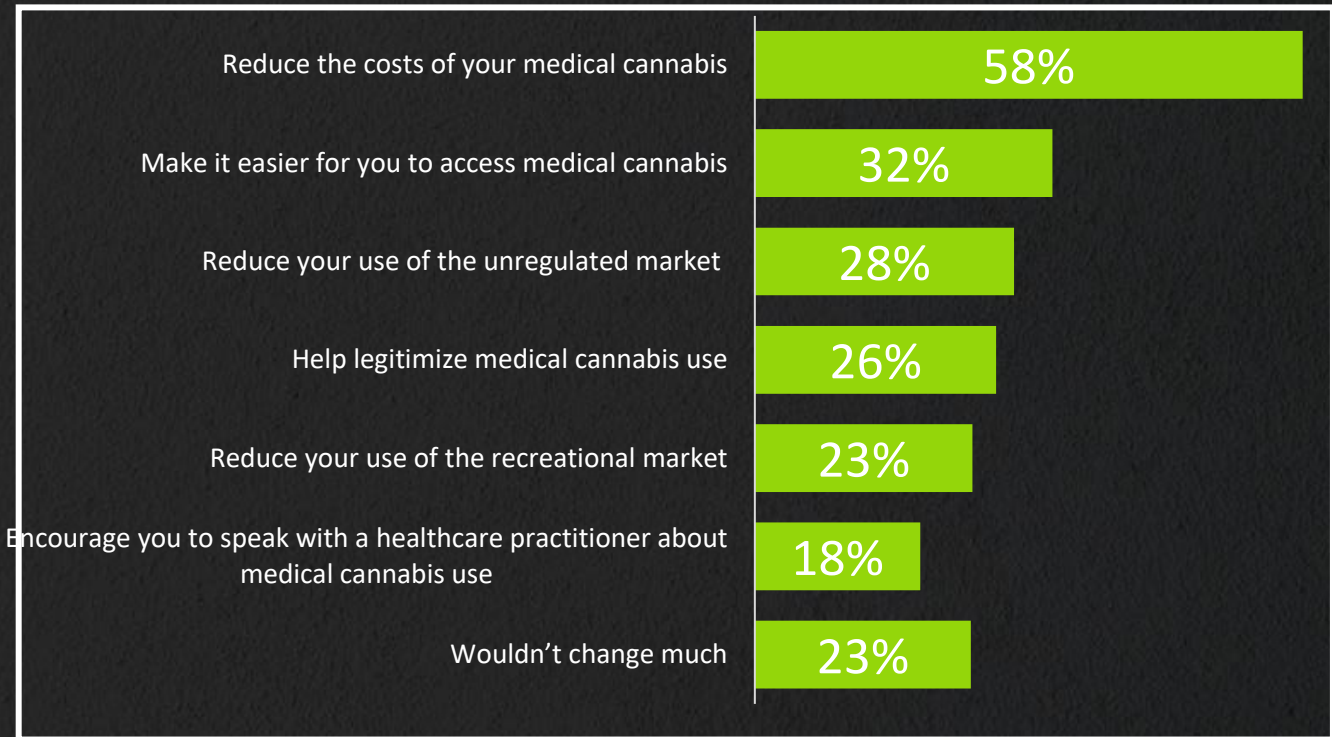
	VERY/ SOMEWHAT SUPPORTIVE	NOT THAT/ AT ALL SUPPORTIVE	NET
THE ELIMINATION OF EXCISE DUTY AND HST/GST/PST (IN APPLICABLE PROVINCES) ON MEDICAL CANNABIS	92%	8%	83
PHARMACIES BEING ABLE TO DISPENSE MEDICAL CANNABIS	90%	10%	80
PHARMACISTS BEING ABLE TO PROVIDE MEDICAL GUIDANCE ON CANNABIS USE AND RISK	92%	8%	84
THE ELIMINATION OF THE 10MG THC / UNIT LIMIT FOR EDIBLE CANNABIS AND INGESTED EXTRACTS	78%	22%	57

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

77%

identify a benefit of removing the excise duty tax in applicable provinces



BENEFIT OF BEING ABLE TO ASK A PHARMACIST FOR MEDICAL GUIDANCE ON CANNABIS USE

If you were able to ask a pharmacist for medical guidance on cannabis use do you think it would... Please select all that apply

69%

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

