



Public Safety
Canada

Sécurité publique
Canada

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

Public Safety Canada

Final Report

November 2023

Prepared for:

Public Safety Canada

Supplier name: Quorus Consulting Group Inc.

Contract award date: July 28, 2023

Delivery date: November 6, 2023

Contract amount (incl. HST): \$96,428.55

Contract #: CW2324422

POR number: 028-23

For more information, please contact:

ps.communications-communications.sp@canada.ca

Ce rapport est aussi disponible en français.

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

Final Report

Prepared for Public Safety Canada

Supplier name: Quorus Consulting Group Inc.

November 2023

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

This publication may be reproduced for non-commercial purposes only. Prior written permission must be obtained from Public Safety Canada. For more information on this report, please contact Public Safety Canada at: ps.communications-communications.sp@canada.ca.

Public Safety Canada
269 Laurier Avenue West
Ottawa, Ontario
K1A 0P8

Catalogue Number:

PS18-79/2024E-PDF

International Standard Book Number (ISBN):

978-0-660-69367-5

Related publications (registration number: POR 028-23):

Catalogue Number PS18-79/2024F-PDF (Final Report, French)

ISBN 978-0-660-69368-2

© His Majesty the King in Right of Canada, as represented by the Minister of Public Safety, 2023




Political Neutrality Statement

I hereby certify as Senior Officer of Quorus Consulting Group Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the [Policy on Communications and Federal Identity](#) and the [Directive on the Management of Communications - Appendix C](#).

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed:

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

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

Table of Contents

Executive summary	5
Research purpose and objectives	10
Research findings	13
Reasons for using cannabis and format preferences.....	13
Exploring cannabis product sources	14
Knowing the difference between authorized and unauthorized sources	16
Cannabis source selection key drivers	19
Concerns regarding non-regulated cannabis.....	22
Methodology	24
Target audience and sample frame	24
Description of data collection procedures.....	25
Appendices	28
Appendix A: Recruitment Screener.....	29
Appendix B: Moderation Guide	39

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.

Supplier name: Quorus Consulting Group Inc.

Contract number: CW2324422

Contract award date: July 28, 2023

Contract amount (including HST): \$96,428.55

For more information, please contact Public Safety Canada at: ps.communications-communications.sp@canada.ca

Research purpose and objectives

The *Cannabis Act*, which came into effect in 2018, regulates the production, possession, distribution and sale of cannabis in Canada. The objective of the Act is twofold. First, it aims to protect the health and safety of Canadians, while serving as a flexible legislative framework that adapts and responds to the ongoing and emerging needs of Canadians. Second, it provides for the establishment of a diverse and competitive legal industry made up of small and large players to displace the illicit market and reduce criminal activity.

Since 2018 the legal market has grown exponentially. The number of legal retail cannabis stores in Canada has increased nearly eightfold according to provincial reports and prices have continued to decline. At the same time, the proportion of Canadians purchasing cannabis from legal sources continues to rise. According to the Canadian Cannabis Survey (CCS), in 2022, about seven in ten Canadians who used cannabis usually obtained it from a legal/ licensed source. Indeed, 61% said they obtained their cannabis from a legal storefront, an increase from 53% in 2021, 41% in 2020 and 24% in 2019, while 8% indicated legal online store as their usual source. The remaining 30% of cannabis users indicated sources other than a known legal/licensed source, including friend (10%), grow their own/having it grown for them (8%), shared with a group of friends (4%), family member (3%), illegal online source (2%), illegal storefront (1%), dealer (1%) or acquaintance (1%).

The purpose of this qualitative research is 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 (PSC) 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. Better understanding these motivations will support efforts to shift more cannabis users to the legal, regulated and lower-risk market, while continuing to displace the illicit market and deter criminal activity that harm Canadians, their families and our communities.

The CCS, the Household Expenditure Survey, as well as some academic research, such as the University of Waterloo International Cannabis Policy Study (ICPS), produce annual statistics on where cannabis users obtain these products by source, disaggregated by age, gender and some other characteristics, such as frequency of use or type of product used (e.g., dried leaf, oil, etc.). Existing research and data have allowed for some analysis of the primary factors that could motivate people who use cannabis to obtain products from sources that are illegal/unregulated. These factors primarily include price and accessibility, as well as perceptions of other less prevalent factors like product quality and selection (ICPS study).

Research objectives

This qualitative research project is intended to better understand the factors that motivate a proportion of people who use cannabis to continue to obtain products from sources other than a legal/licensed source, despite legal cannabis being widely available. Insights may inform future policy directions and the development of public awareness and education initiatives that speak to cannabis sourcing behaviours, the risks associated with the illegal/unregulated market and encourage more cannabis users to access legal/regulated products.

Specifically, Public Safety Canada is seeking insights and understanding of:

- 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 products cannabis;
- what might influence this group of cannabis users to change their behaviour.

Findings from this research will be shared with partners and stakeholders in the provinces and territories and other federal departments to advance the following public policy and communications/awareness objectives tied to the displacement of the illegal cannabis market:

- encourage this group of cannabis users to change their behaviour through targeted public awareness and education campaigns that speak to the contextual, personal and social factors that affect these motivations;
- continue to encourage more Canadians who use cannabis to access the legal/regulated market;
- reduce the illegal market, including the profits to organized crime groups benefiting from the illicit cannabis market.

Research findings

Reasons for using cannabis and format preferences

At the beginning of each session, participants were asked to expand on their cannabis consumption patterns and preferences.

Firstly, participants were asked to share their reasons for using cannabis. Participants consumed cannabis for a variety of medicinal and recreational purposes. Those who used cannabis entirely or partially for medicinal purposes often used it to help them manage pain, to help them sleep, or as a mood regulator assisting with symptoms of anxiety and depression. Those who used cannabis more for recreational purposes mentioned using it for relaxation, stress relief, and for socialization. A few preferred to use cannabis in social settings or for relaxation as an alternative to alcohol.

["It's much better for me to use cannabis to relax, instead of alcohol. The negative effects of alcohol were important for me. So, I decided to stop that."] – Male, 47, Quebec "C'est beaucoup mieux pour moi de consommer du cannabis pour me relaxer que de boire de l'alcool... Les méfaits de l'alcool étaient importants pour moi. Ça fait que j'ai décidé de vraiment de stopper ça."

Participants also expanded on where and when they typically use their cannabis products. Those who use medicinally often used on an as-needed basis for pain or consumed in the evenings to aid in sleeping. Those who used cannabis recreationally often did so in the evenings or on weekends, although this varied with some more frequent users reporting that they use throughout the day. 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 and this in a variety of settings such as at home, at a friend's home, at a cottage, etc.

Across both recreational and medicinal users, preferred formats of consuming cannabis mainly included joints, vaping, and edibles. Medicinal users also reported using ointments/creams, pills, and oils. Some users reported using other formats such as sprays or beverages. Male participants more often discussed smoking joints or vaping cannabis compared to female ones. On the other hand, slightly more female participants described using topical products such as creams.

The advent of different formats, especially following legalization, has prompted some to switch away from smoking cannabis products to products such as oils, pills and creams. Over time, some have also shifted away from smoking cannabis products, which is something they would have done when they were younger, to more concentrated products that they don't need to smoke as

their reasons for using cannabis have changed from purely recreational to either entirely or partially for medicinal reasons – for these participants, they are less interested in “getting high” and more focused on addressing their ailment.

Some also mentioned switching from joints or bongs to vaping since it is seen as less harsh on their throat and does not make them cough as much. Additionally, these participants preferred the minimal smell that comes with vaping as it is more discreet; they do not have to worry about the smell lingering on clothing and they also do not necessarily need to go outside to use their vaping device.

For similar reasons, some participants also mentioned relying on edibles or beverages as they are discreet, easy to consume, not harsh on the throat or lungs, and do not have any strong or lingering smell. A few mentioned preferring edibles as the effects tend to last longer than if they were to smoke. Some participants who used cannabis medicinally explained that edibles produced more of a “body high” which was more effective at managing pain compared to other formats such as smoking.

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. Therefore, all participants used “other” sources for at least some of their cannabis products.

For the most part, unauthorized sources were most often used to obtain edibles and leaf products. 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. Those who ordered online seemed to use websites that shipped from other provinces more often than the one in which they lived. Ordering online from other provinces was common among participants in Quebec who explained that certain products such as edibles or vaping products are not easily accessible in their region.

In regards to other regional differences, participants in British Columbia and Atlantic Canada more often mentioned using a “dealer”. It was quite common for participants in Atlantic Canada and the Prairies to say that they obtained at least some or most of their cannabis products from authorized dispensaries as they find these retailers to be conveniently located and the prices to be very competitive compared to their known unauthorized sources.

The male participants mentioned using a “dealer” slightly more often compared to the female participants. Additionally, participants aged 35 and older tended to indicate using a dealer, or

growing cannabis themselves or getting cannabis from a friend or family member who grows it compared to the younger participants.

Some participants who use medicinally and rely a great deal on products that involve some sort of “dosage” or mixture, such as oils, creams and pills, nearly always obtained 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.

“I use it for medicinal purposes more so, I like to know how much THC is in it. And so that's why when I'm using the oils, I would rather know for sure sort of how much THC is in it.” – Female, 34, Ontario

“Anything else like oils and edibles, I get locally at our dispensary here mostly because it's more controlled. I've had friends that have made like brownies and chocolates and it's really variable how much is in there and you don't know. I like to have a little bit more control over what I'm ingesting.” – Male, 34, Nunavut

That said, it was not uncommon for some of these participants to explain that they obtain some of their other cannabis products from unauthorized sources. While those who use medicinally were generally more selective about using unauthorized sources, those who use cannabis mostly or entirely for recreational purposes seemed much more inclined to be familiar with and use unauthorized sources.

Overall, when participants were asked why they chose to obtain cannabis from unauthorized sources, the main reasons shared were the price and quality of the product. Other common reasons included the availability of products with higher levels of THC than what is allowed to be sold by authorized retailers, convenience (for example, doorstep service, available when dispensaries are closed, etc.), product variety, being able to “try before you buy” or see what you buy, and strong customer service. Ultimately though, the overarching factor that led participants to continue purchasing from unauthorized sources was a high degree of trust in their source(s).

“I'm actually not a big fan of the dispensaries. I don't like the type of quality that they have. So I get it from a friend and I've been doing that for quite a while and I've been really satisfied with what I've gotten from him compared to what I may have gotten from dispensaries before. I trust him 100%. He smokes with me every time and everything, so, I know that it's good.” – Female, 32, Ontario

Several participants explained that they have a personal connection or bond with the person who sells them cannabis, and thus there is a strong level of trust.

["It may sound stupid, but the relationship I have with my dealer is a friendly one. We share something, as opposed to an employee who doesn't know me, so you know, it is the relationship, I think."] – Female, 33, Quebec "C'est peut-être con, mais le lien, admettons comme moi avec mon dealer, on a un lien amical. Il y a un partage, tandis qu'avec admettons un employé, bien il ne me connaît pas, fait que tu sais, le petit lien, je pense

Knowing the difference between authorized and unauthorized sources

Participants were reminded that only cannabis products that come from government-regulated, authorized retailers are legal, and products from all other sources are not regulated and are considered illegal cannabis. This did not come as a surprise to participants and when asked, few could think of any situation where they were not sure if they were obtaining legal or illegal cannabis.

"Generally, when I get flowers, I'm purchasing it. I know that if it's not from the local cannabis retailer here, that it is going to be from illegal sources. I'm aware of that. I don't have to ask a lot of questions." - Male, 34, Nunavut

However, when discussing the availability of unauthorized storefronts or websites, many participants were not confident that they would be able to distinguish between which ones were government authorized or not.

Being able to distinguish authorized storefronts from unauthorized ones differed regionally. 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. Some suspected there is some sort of sign or "permit" in the window and some suspected that they would be able to tell from the appearance of the products. Some also felt they would recognize certain chains or bigger "brand names" as authorized retailers and that they would be more suspicious of a one-off store.

Several participants in these regions also admitted that they had not really thought about this or paid much attention when making purchases in brick-and-mortar shops. Some participants were under the impression that since cannabis is now legal, any storefront would have to be authorized by the government in order to open (or remain open).

"In the North, we only have one dispensary and it's legal... when I travel to say, Alberta, and I know there's a large number of retailers who sell it, I think I was under the impression that they were all legal. I haven't really looked at the packaging to see if they all have the same, you know, but I think I just assumed because they're so public like

they're not hidden away that they're all registered and legal to operate.” - Male, 34,
Nunavut

“I have no idea. I assume if they have a storefront that they're legal because otherwise I
feel like they'd get shut down but I have no idea.” – Female, 34, Manitoba

“Honestly, I naturally assume that if I go to a dispensary, they all are legal.” – Female, 19,
Ontario

On the other hand, being able to distinguish between authorized and unauthorized retailers was deemed easy and obvious by participants who live in jurisdictions where only government dispensaries exist such as in Atlantic Canada, Quebec, Nunavut, etc.

“In Nova Scotia, it's cut and dry. If it's not in the liquor store, it's not legal but they don't
always close down the other facilities or places because I think one thing is there has to
be a complaint from the public.” – Female, 40, Nova Scotia

There was some lack of awareness surrounding the legality of obtaining cannabis from friends or family members. A few participants assumed that since people are legally allowed to grow cannabis and consume it, that they were also allowed to give some away or sell it.

“What if like there's just some homegrown weed, is that illegal? Because it's legal in
Canada, you can have like your own plants, right?” – Male, 29, Ontario

“I'm just figuring out what's legal and what's illegal... it's mostly through a friend who has
his little grow and from there he'll throw me a few nugs here and there. I wouldn't have
considered that kind of illegal.” – Female, 32, Ontario

Confidence was much lower among all participants when asked if they would be able to distinguish between authorized and unauthorized online retailers. Some guessed that there would be a certification somewhere on the website although many also admitted that they had not really questioned whether these websites could be unauthorized, and some simply were not concerned. Confidence was high regarding legitimacy among participants who explained that they ordered from websites of known authorized brick-and-mortar stores but many of these same participants claimed being unaware when it came to other types of online retailers.

“There was an online delivery resource I was using for a while... I have no idea if they're
legal. I mean, like, you know, they're taking orders and I think there's card payments. It
might have just been cash only even, but I have no idea, like there's just no way to really
verify that.” – Male, 34, British Columbia

“As far as I know, it must be legal because they ship it across Canadian borders and they are legalized sellers as far as I know. As far as mailing it, I'm pretty sure it's legal, maybe different provinces might have different rules but where I get my gummies from it comes from British Columbia.” – Male, 47, New Brunswick

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. Only a couple participants mentioned doing so and explained that they found a government website which had a list of authorized retailers in their province.

While participants did not organically suggest product packaging as a sign that a product or retailer may be unauthorized, when explicitly shown images and given a description, many felt that the differences were fairly clear. Participants were shown images and descriptions of what a legal cannabis product looks like and what might be a strong sign that a retailer is unauthorized. Many participants seemed to feel they were aware of the information presented. For the most part, they at least felt that these regulations on authorized cannabis made sense and aligned with products they had seen from authorized retailers.

When identifying what might be new information to them, some participants mentioned not having realized that the excise stamp is different in each province/territory. Several were also unaware that a retailer that sells across provincial borders is likely unauthorized (and many reported having ordered online from other provinces in the past, especially from British Columbia). Additionally, some were surprised to learn that a retailer that offers referral or sign-up bonuses or promotions is not likely authorized, which was also something many had seen in the past from sources which they assumed were authorized.

“The one thing that surprises me is the shipping across provincial borders. I didn't know that that was illegal. I feel like there are a lot of online retailers that ship pretty much everywhere.” – Female, 21, Alberta

“The referral and sign-up bonuses or promotions is news to me, though, because I've definitely seen things kind of like advertised throughout social media and stuff that have displayed like, you know, like refer a friend to this place and receive 10 percent off your next item or whatever.” – Female, 27, British Columbia

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 felt that “cannabis is legal in Canada” and as such it does not matter where they obtain their products. As well, many were consuming cannabis before legalization - they were indifferent about this issue then and their views have not changed.

“I was consuming this stuff before there were any alleged testing of percentages or anything like that and it's whatever. I don't think there's going to be too much of an issue.” – Male, 37, Nova Scotia

“I was a cannabis consumer before it was legal. So, I'm used to kind of getting it from whomever not knowing what it was.” – Female, 43, Nova Scotia

Many felt that in today's market, it is not so much about what is “legal vs. illegal”, it is about who you trust and who you don't trust.

“I think, yeah, legal versus not legal doesn't really matter. For me, it's whether it's coming from a trusted source. So, is it someone that I bought from before or someone else has.”
– Female, 38, Newfoundland

Cannabis source selection key drivers

When considering the reasons for choosing an unauthorized source over a government-authorized retailer, participants discussed factors such as convenience, price, variety, and quality. Ultimately, price came out as the most important driver which led participants to continue to source cannabis from unauthorized sources. This was followed by quality and convenience.

Regionally, participants in British Columbia, Atlantic Canada and the Prairies tended to say that price was the most important factor, while those in Ontario gave slightly more importance to quality. In Quebec however, variety/availability was typically deemed as the most important factor that led them to purchase from unauthorized sources or purchase from other provinces.

Price was particularly a concern when it came to purchasing dry leaf and edibles for which the price gap was deemed quite large between authorized and unauthorized sources. Some participants shared that the prices in authorized stores were often double or even triple the prices they are able to get from a friend, dealer, or unauthorized online source.

“It's cheaper to buy them online. I find going into the store, you would pay at least double, if not triple what you would pay to order it online.” – Female, 30, Manitoba

“I've always gotten on the street and never went to dispensary really. Maybe once or twice when it first came out just to experience, you know, but then when you see the price, it's like, oh my God, rather just stick to the streets.” – Male, 49, British Columbia

Participants in more rural areas with less access to dispensaries, such as those in the Territories explained how the lack of competition between retailers drove the prices up, which in some cases steered them to search for other sources which would be more affordable.

While price was a concern across almost all participants, younger participants tended to say that it was the biggest factor drawing them away from authorized retailers. Those who consume large quantities of cannabis products also had more concerns regarding prices.

When asked how close in price the authorized retailers would need to be to their unauthorized sources, participants felt like it would have to be about the same for them to consider switching.

“It would have to be on par, I think, like probably matching my buddy's because not only is this stuff cheaper, but it's more potent... The product itself is much more enjoyable. I find sometimes dispensaries, kind of the strength is a little weaker like I find myself having to use the product more frequently... I run out of it quicker than I would my buddy's stuff. So, I think the strength also has to correlate with the pricing as well.” – Male, 27, Yukon

Additionally, “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 (for example, they know their source does not use chemicals, pesticides, etc.) and freshness. Many described how the regulations surrounding THC content (for instance the limit of 10 mg of THC per package of edible products) prevented them from being able to legally buy products that were potent enough, leading them to seek alternative sources.

Participants also shared concerns regarding the packaging of government-authorized cannabis as they are unable to see, smell, or sample the product before making a purchase. Many participants who obtain their cannabis from a “dealer” or friend discussed being able to observe and smell the product (particularly dry leaf/flower) beforehand, which often gave them a sense of whether they would enjoy that product or not. Additionally, some mentioned that they will also smoke with their friend or dealer and therefore they are able to see if they like the product before committing to purchasing a larger quantity.

A few described past experiences of purchasing dry leaf from an authorized dispensary only to discover that the product was very dry, too crumbly, or even mouldy. This led to dissatisfaction as the participants had already left the store and were not able to go back, or if they did go back, they were given a hard time when trying to return the product. These participants shared that the ability to see and smell the flower before would have prevented this issue.

“Sometimes these dispensaries produce in such mass amounts that you get some of the herb and it's all dry or... you touch it and it just turns to dust. In terms of getting it from a person who really knows how to grow and who's proud of their product and you can smoke it and really taste the difference or really admire the type of different and high.” –

Male, 29, Ontario

“With going to dispensaries, I've noticed a lot of product quality just seems lower. Like as far as like plant itself goes, I've noticed a lot of stale product...dryer product.” – Female, 27, British Columbia

Many also described how their “dealer” does a number of things to maximize loyalty and “customer satisfaction”, which also adds to the convenience level. This might include doorstep service, anytime service, the opportunity to sample the product, the opportunity to see the product before they buy, small bonuses or extra product from time to time, and no-hassle returns if they are not satisfied with the product they obtained. Some also described how their source has improved on these activities since legalization.

As well, many who had been consuming cannabis since before legalization continue to use the same source who provided them with cannabis before they had the option to purchase legally. For some, this was due to trust, while others were familiar with the product and enjoyed it. Some participants also liked the idea of supporting their dealer or friend and in a sense felt that they were supporting their “business” or buying local.

The lack of variety of products available in authorized sources was a common reason for using unauthorized sources. This was most likely to come from participants living in jurisdictions where the only dispensaries were government-operated such as in Nunavut, Atlantic Canada, and Quebec for instance. This compelled many participants to look online for greater variety. Some in Quebec also either drove or took the train to Ontario to “stock up” while one participant in Nunavut looked regularly to a fly-in-fly-out friend who brought him products from other provinces. Variety was mostly an issue when it came to products such as edibles, wax/concentrates, and vapes. Participants in Quebec seemed to consistently complain about the poor taste of the edible products available at the SQDC.

[“Here in Quebec, there are three types of edibles, but in Ontario, there are 50 or 60.”] – Male, 36, Quebec “Ici au Québec, il y a trois sortes d’edibles, mais tu vas en Ontario, il y en a 50-60.”

Some participants admitted having shopped at unauthorized cannabis retailers in the past simply because they lacked clarity on how to distinguish between what is considered “legal” or “illegal”. A few participants were under the impression that some stores they had visited were authorized and only concluded they likely were not authorized after discussing the requirements around packaging. Some had purchased edibles from either storefronts in their city or on a reserve and shared that the packaging was labelled with images and play-on-words of popular candy brands, had a THC content above 10mg, or did not contain the required labels.

“A lot of just looks just like candy, especially the edibles too, but they'll change it to instead of Sour Patch kids like Stoney Patch Kids” – Male, 37, Nova Scotia

A few explained that they do not want to purchase from dispensaries because they are not interested in supporting the government or in buying from a monopoly.

The level of knowledge of sales representatives in storefronts also had an impact on a few participants. Some, especially those who use medicinally, appreciated that the sales representatives in their local dispensaries were quite knowledgeable about cannabis products. They explained how these clerks were familiar with the effects of different products and of the impacts of different THC and/or CBD levels. This knowledge was not only reassuring but also helpful, especially if they were looking to stray from their routine purchases. Conversely, a few explained how their friends or their dealer were much more knowledgeable or, similarly, that the clerks in their local shops were not helpful at all and that this compelled them to consider alternate sources.

Finally, a few felt that buying from their dealer or their friend was more discreet than walking out of a cannabis shop.

Many explained that if they were to temporarily travel to a different city or province/territory where they did not have a “source”, they would most likely obtain their cannabis product from an authorized source. That said, if some were to move entirely, they would start with authorized sources until they had established a network of friends and other cannabis users, at which point they would probably seek out an unauthorized source.

Concerns regarding non-regulated cannabis

Participants were asked if they had any concerns about the way they were currently obtaining their cannabis. Across the groups, participants did not bring up any concerns.

When probed specifically about personal health or personal safety concerns with their current non-regulated cannabis products, participants also did not express concerns. As many had been using the same sources for numerous years, they explained that there was a level of trust and relationship there which did not lead them to feel that there could be any level of danger in regard to the product being laced or otherwise unsafe.

When probed specifically about legal consequences, 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 did not seem to feel that law enforcement was looking to catch individuals for purchasing from unauthorized sources. A few mentioned that

they could simply say they made their purchases from the authorized dispensary if ever being questioned by law enforcement.

Participants are not convinced that illegal sources or suppliers should be too worried either since they believe that the police are not very strict when it comes to enforcing cannabis laws. Overall, they believe law enforcement has larger issues that take precedence, especially when it comes to cracking down on substances that are actually illegal.

“I have zero concern about the legality or getting in trouble. As far as I've seen, anyone who bears the brunt of law enforcement seems to be the shops that are operating illegally.” – Female, 41, Nova Scotia

Finally, when asked whether they could see a connection between obtaining cannabis from illegal sources and organized crime, very few participants did. There was a general belief that organized crime is not focused on cannabis, but rather more illicit or “harder” drugs. Some felt that before legalization this may have been the case, however there is now more competition which would result in cannabis not being a worthwhile method of organized crime. As well, many participants have known their source for a very long time and thus knew that they were not connected to organized crime.

“I think they made more of it when it wasn't legal because it was a black market then, which was legalized now. There's not as much profit to be made in it.” – Male, 47, New Brunswick

“Unless you're somebody like that's getting it from somebody that you know is personally growing it, you know. If you're getting it from a supplier that's getting it from a supplier, you're very unlikely to know that it's not connected to some type of organised crime.” – Female, 35, Yukon

“There maybe in the past when I was younger, there probably was organised crime involved in most of the sales of cannabis where I lived, but it's not what it used to be. That's changed. Legalisation did change that and they've moved on to other drugs. Cannabis isn't the moneymaker for organised crime that it used to be, especially the fact that we can grow it ourselves now.” – Male, 64, British Columbia

Methodology

Overview: The research methodology consisted of 11 online focus groups with adults who use cannabis and who obtain cannabis products from sources other than authorized ones. The sessions included participants from across the country. Research was conducted between October 16 and November 2, 2023 and a total of 70 participants participated in the focus groups.

Quorus was responsible for coordinating all aspects of the research project including working with PSC in designing and translating the recruitment screener and the moderation guide, coordinating all aspects of data collection logistics, including participant recruitment, providing the online focus group platform and moderating all focus groups and delivering required reports at the end of data collection. The research approach is outlined in greater detail below.

Target audience and sample frame

The target audience for this research study consisted of Canadian adults of legal age who use cannabis and obtain at least some of their cannabis products from sources other than a legal storefront or online source or who don't know the source of their cannabis products.

The focus groups were segmented based on the following age categories:

- Minimum legal age to 34 years of age
- 35+

Two groups were held in each of the following regions:

- Ontario / Nunavut
- Quebec
- Prairies (Manitoba / Saskatchewan / Alberta) / Northwest Territories
- British Columbia / Yukon
- Atlantic Canada (New Brunswick, Nova Scotia, Newfoundland, Prince Edward Island)

In the design of the recruitment screener, specific questions were inserted to clearly identify whether participants qualified for the research program and to ensure, where applicable, a good representation by age, region, gender and ethnicity. As well, on a best-effort basis, recruitment aimed to include a mix of those who use cannabis recreationally or medicinally, and a mix based on frequency of use.

In addition to the general participant profiling criteria noted above, additional screening measures to ensure quality respondents include the following:

- No participant (nor anyone in their immediate family or household) was recruited who worked in related government departments/agencies, nor in advertising, marketing research, public relations, a legal or law firm, a cannabis-related company, or the media (radio, television, newspaper, film/video production, etc.).
- No participant acquainted with another participant was knowingly recruited for the same study, unless they were recruited into separately scheduled sessions.
- No participant was recruited who had attended a qualitative research session within the past six months.
- No participant was recruited who had attended five or more qualitative research sessions in the past five years.
- No participant was recruited who had attended a qualitative research session on the same general topic as defined by the Researcher/Moderator in the past two years.

Description of data collection procedures

Data collection consisted of online focus groups. Each focus group lasted approximately 90 minutes. For each focus group, Quorus recruited 8 participants with the goal of achieving 6-8 participants per session. All focus group participants were given an honorarium of \$125 after their session.

Participants invited to participate in the focus groups were recruited by telephone through random digit dialing of the public, social media advertising, referrals, as well as through the use of a proprietary opt-in database.

The recruitment of participants followed the screening, recruiting and privacy considerations as set out in the *Standards for the Conduct of Government of Canada Public Opinion Research—Qualitative Research*. Furthermore, recruitment respected the following requirements:

- All recruitment was conducted in the participant’s official language of choice, English and French, as appropriate.
- Upon request, participants were informed on how they can access the research findings.
- Upon request, participants were provided Quorus’ privacy policy.
- Recruitment confirmed each participant had the ability to speak, understand, read and write in the language in which the session was to be conducted.
- Participants were informed of their rights under the *Privacy and Access to Information Acts* and ensure that those rights were protected throughout the research process. This included: informing participants of the purpose of the research, identifying both the

sponsoring department or agency and research supplier, informing participants that the study will be made available to the public in 6 months after field completion through Library and Archives Canada, and informing participants that their participation in the study is voluntary and the information provided will be administered according to the requirements of the *Privacy Act*.

At the recruitment stage and at the beginning of each focus group, participants were informed that the research was being conducted for the Government of Canada/Public Safety Canada. Participants were informed of the audio/video recording of their session and of the presence of Public Safety Canada observers. Quorus ensured that prior consent was obtained at the recruitment stage and before participants began their focus group.

All online focus groups were conducted in the evening after regular business hours. The research team used the Zoom platform to host and record focus group sessions (through microphones and webcams connected to the moderator and participants electronic devices, such as their laptop, tablet or smartphone) enabling client remote viewing.

A total of 11 online focus groups were conducted across Canada between October 16 and November 2, 2023, in which 70 cannabis users participated. The details of these groups are outlined in the table below.

Date and Time (EDT)	Region	Segment	Language	Number of participants
Monday October 16 @ 5:00 PM	Ontario / Nunavut	Cannabis users aged 19 to 34	English	8
Monday October 16 @ 8:00 PM	British Columbia / Yukon	Cannabis users aged 19 to 34	English	5
Tuesday October 17 @ 5:00 PM	Ontario / Nunavut	Cannabis users aged 35+	English	8
Tuesday October 17 @ 8:00 PM	British Columbia / Yukon	Cannabis users aged 35+	English	8
Wednesday October 18 @ 4:00 PM	Atlantic Canada	Cannabis users aged 19-34	English	8
Wednesday October 18 @ 7:00 PM	Prairies (MB/SK/AB) / Northwest Territories	Cannabis users aged 18-34 (AB) / 19-34	English	6
Thursday October 19 @ 4:00 PM	Atlantic Canada	Cannabis users aged 35+	English	7
Thursday October 19 @ 7:00 PM	Prairies (MB/SK/AB) / Northwest Territories	Cannabis users aged 35+	English	7
Monday October 23 @ 5:00 PM	Quebec	Cannabis users aged 21-34	French	3
Monday October 23 @ 7:00 PM	Quebec	Cannabis users aged 35+	French	4

Thursday November 2 @ 5:00 PM*	Quebec	Cannabis users aged 21+	French	6
--------------------------------	--------	-------------------------	--------	---

*In order to make up for low participation rates and capture a more robust sample among the target audience, an additional session in Quebec.

Appendices

Appendix A: Recruitment Screener

Specifications

- Recruit 8 participants per group, for 6 to 8 to show
- Participants to be paid \$125
- 10 online focus groups will be conducted with Canadians in the following locations:
 - Ontario/Nunavut (English)
 - Quebec (French)
 - Prairies (Manitoba, Saskatchewan, Alberta)/NWT (English)
 - British Columbia/Yukon (English)
 - Atlantic Canada (English)
- Groups will consist of Canadian adults of legal age who use cannabis and will be segmented based on age.
- Efforts will be made to recruit a mix of participants based on gender, household type, cultural background, frequency of using cannabis (with a majority being frequent users) as well as reason for using cannabis (medicinal or non-medicinal).

All times are stated in local area time unless specified otherwise.

Group 1 Ontario/Nunavut October 16 5:00 pm EDT 19 to 34	Group 2 BC/Yukon October 16 5:00 pm PDT 19 to 34	Group 3 Ontario/Nunavut October 17 5:00 pm EDT 35+	Group 4 BC/Yukon October 17 5:00 pm PDT 35+
Group 5 Atlantic Canada October 18 5:00 pm ADT 19-34	Group 6 Prairies (MB/SK/AB)/NWT October 18 6:00 pm CDT 18-34 (AB) / 19-34	Group 7 Atlantic Canada October 19 5:00 pm ADT 35+	Group 8 Prairies (MB/SK/AB)/NWT October 19 6:00 pm CDT 35+
Group 9 Quebec October 23 5:00 pm EDT 21-34	Group 10 Quebec October 23 7:00 pm EDT 35+		

Questionnaire

A. Introduction

Hello/Bonjour, my name is [NAME] and I am with Quorus Consulting Group, a national public opinion research company. We're planning a series of online discussion groups on behalf of the Government of Canada with people in your area. Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

[INTERVIEWER NOTE: FOR ENGLISH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN FRENCH, PLEASE RESPOND WITH, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à ces groupes de discussion. Nous vous remercions de votre intérêt." FOR FRENCH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN ENGLISH, PLEASE RESPOND WITH, "Unfortunately, we are looking for people who speak French to participate in this discussion group. We thank you for your interest."]

[INTERVIEWER NOTE 2: IF SOMEONE IS ASKING TO PARTICIPATE IN FRENCH/ENGLISH BUT NO GROUP IN THIS LANGUAGE IS AVAILABLE IN THIS AREA, TALK TO YOUR SUPERVISOR. EFFORTS WILL BE MADE TO INCLUDE THEM IN A GROUP IN THEIR PREFERRED LANGUAGE IN THE NEAREST TIME ZONE TO WHERE THEY LIVE. ONE-ON-ONE INTERVIEWS CAN ALSO BE ACCOMMODATED AS THE NEED ARISES.]

As I was saying – we are planning a series of online discussion groups on behalf of the Government of Canada with people in your area. The research will focus on understanding where Canadians who consume cannabis products choose to obtain these products. The groups will last up to 90 minutes (one and a half hours) and people who take part will receive a cash gift to thank them for their time.

Participation is completely voluntary. We are interested in your opinions. No attempt will be made to sell you anything or change your point of view. The format is a group discussion held using the online web conferencing platform Zoom, led by a research professional with about six to eight other participants invited the same way you are being invited. The use of a computer, tablet, or a smartphone in a quiet room is necessary for participation. All opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy.

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: “The information collected through the research is subject to the provisions of the *Privacy Act*, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation.”]

1. Before we invite anyone to attend, we need to ask you a few questions to ensure that we get a good mix of people in each of the groups. This will take 5 minutes. May I continue?

Yes	1	CONTINUE
No	2	THANK/DISCONTINUE

B. Qualification

2. In which province/territory do you live in?

RECORD _____

ALL PROVINCES AND AT LEAST ONE TERRITORY SHOULD BE REPRESENTED. IN “PRAIRIES” AND “ATLANTIC CANADA”, AIM FOR A MIX ACROSS PROVINCES

3. Do you, or any member of your immediate family, work for...? **[READ LIST]**

...a marketing research, public relations, or advertising firm?	1
...the media (radio, television, newspapers, magazines, etc.)?	2
...the federal or provincial government?	3
...a company that grows, produces, packages, sells or distributes cannabis products?	4
...a legal or law firm?	5

IF YES TO ANY, THANK AND TERMINATE

4. Have you ever attended a discussion group or taken part in an interview on any topic that was arranged in advance and for which you received money for participating?

Yes	1	
No	2	GO TO Q8

5. When did you last attend one of these discussion groups or interviews?

Within the last 6 months	1	THANK & TERMINATE
Over 6 months ago	2	

6. Thinking about the groups or interviews that you have taken part in, what were the main topics discussed?

RECORD: _____

THANK/TERMINATE IF RELATED TO CANNABIS

7. How many discussion groups or interviews have you attended in the past 5 years?

Fewer than 5	1	
Five or more	2	THANK & TERMINATE

8. In the past 12 months, how often did you use cannabis? [**IF NEEDED:** This includes using cannabis in its dry form or when mixed or processed into another product, such as an edible, a concentrate, including hashish, a liquid, or other product.]

Every day	1	} FREQUENT USER
Less than daily , but at least once in a week	2	
Less than once a week, but at least once in a month	3	} OCCASIONAL USER
Less than once a month, but at least once in the past year	4	
Not at all	5	THANK & TERMINATE

RECRUIT ROUGHLY 6 FREQUENT USERS AND 2 OCCASIONAL USERS PER GROUP

9. Is the cannabis that you consume entirely for recreational purposes, also for medicinal purposes or entirely for medicinal purposes?

Entirely recreational	1
Partly medicinal	2
Entirely medicinal	3

RECRUIT A MIX

10. Studies show that individuals who use cannabis in Canada obtain their products from a wide range of sources, including regulated and unregulated sources. Over the past 12 months, have you purchased or obtained your cannabis products from any of the following? **SELECT ALL THAT APPLY**

IF NEEDED: The product package will establish if you are buying a “legal” product – it should show a standardized cannabis symbol, a mandatory health warning message, and the packaging should be plain-looking and child-resistant. If the retailer does not verify age, has appealing packaging, ships everywhere in Canada, and has referral or sign up bonuses or promotions, they are not likely an authorized retailer.

- | | |
|--|----|
| A government-regulated store or dispensary | 1 |
| A government-regulated website | 2 |
| A non-regulated store or dispensary | 3 |
| A non-regulated website | 4 |
| A friend or family member | 5 |
| A local cannabis “dealer” | 6 |
| You grow your own cannabis | 7 |
| Anywhere else? Please specify: _____ | 77 |
| Don’t know/unsure | 99 |

IF ANY OPTION OTHER THAN 1, 2 OR 7 IS SELECTED, CONTINUE. IF “OTHER SPECIFY” IS SELECTED AND UNSURE IF SOURCE IS LEGAL OR NOT, SPEAK TO SUPERVISOR

11. We are looking to include people of various ages in the group discussion. May I have your age please? **RECORD AGE:** _____

RECRUIT A MIX WITHIN EACH SEGMENT, NOTING THE MINIMUM AGE REQUIREMENTS IN EACH REGION AS FOLLOWS:

- **ALBERTA – 18 YEARS OLD**
- **QUEBEC – 21 YEARS OLD**
- **ALL OTHER PROVINCES AND TERRITORIES – 19 YEARS OLD**

12. What is your gender identity? [If you do not feel comfortable disclosing, you do not need to do so] **[DO NOT READ LIST]**

- | | |
|--|---|
| Male | 1 |
| Female | 2 |
| Prefer to self-describe, please specify: _____ | 3 |

Prefer not to say

4

AIM FOR 50/50 SPLIT OF MALE AND FEMALE, WHILE RECRUITING OTHER GENDER IDENTITIES AS THEY FALL

13. We want to make sure we speak to a diversity of people. Do you identify as any of the following? SELECT ONE

- | | |
|--|---|
| An Indigenous person from Canada (First Nations, Inuit or Métis) | 1 |
| A member of a racialized community (other than an Indigenous person) | 2 |
| None of the above | 3 |

FOR ALL GROUPS, AIM FOR SOME REPRESENTATION FROM RACIALIZED AND INDIGENOUS INDIVIDUALS ON A BEST EFFORT BASIS

14. [ASK ONLY IF Q13=2] What is your ethnic background?

RECORD ETHNICITY: _____

15. Which of the following categories best corresponds to your household income, before taxes, of all members of your household, for 2022? READ

- | | |
|-----------------------------------|---|
| Under \$40,000 | 1 |
| \$40,000 to just under \$60,000 | 2 |
| \$60,000 to just under \$80,000 | 3 |
| \$80,000 to just under \$100,000 | 4 |
| \$100,000 to just under \$150,000 | 5 |
| \$150,000 and over | 6 |
| Prefer not to say | 7 |

RECRUIT A MIX

16. Do you currently live in... [READ LIST]

- | | |
|---|---|
| A city or metropolitan area with a population of at least 100,000 | 1 |
| A city with a population of 30,000 to 100,000 | 2 |
| A city or town with a population of 10,000 to 30,000 | 3 |
| A town or rural area with a population under 10,000 | 4 |

ON A BEST EFFORT BASIS, FOR EACH GROUP, RECRUIT A MIX OF INDIVIDUALS WHO LIVE IN A CITY OR TOWN WITH A POPULATION OF AT LEAST 30,000 AND TWO WHO LIVE IN SMALLER TOWNS/RURAL

17. Participants in group discussions are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in an online group discussion with other adults Are you... **READ OPTIONS**

Very comfortable	1	MIN 5 PER GROUP
Fairly comfortable	2	
Not very comfortable	3	THANK & TERMINATE
Very uncomfortable	4	THANK & TERMINATE

18. Do you have access to a stable internet connection, capable of sustaining a 90-minute online video conference?

Yes	1	
No	2	THANK & TERMINATE

19. Participants will be asked to provide their answers through an online web conferencing platform using a computer, a tablet or a smartphone in a quiet room. Is there any reason why you could not participate? (No access to computer or tablet, internet, etc.) If you need glasses to read or a device for hearing, please remember to wear them.

Yes	1	
No	2	SKIP TO INVITATION

20. Is there anything we could do to ensure that you can participate?

Yes	1	
No	2	THANK AND TERMINATE
DK/NR	9	THANK AND TERMINATE

21. What specifically? [OPEN END]

INTERVIEWER TO NOTE FOR POTENTIAL ONE-ON-ONE INTERVIEW

RECRUITER NOTE: WHEN TERMINATING AN INTERVIEW, SAY: “Thank you very much for your cooperation. We are unable to invite you to participate because we have enough participants who have a similar profile to yours.”

C. INVITATION TO PARTICIPATE

22. I would like to invite you to participate in an online focus group session where you will exchange your opinions in a moderated discussion with other Canadians in your region. The discussion will be led by a researcher from the national public opinion research firm, Quorus Consulting. The session will be recorded but your participation will be confidential. The group will be hosted using an online web conferencing platform, taking place on [DAY OF WEEK], [DATE], at [TIME]. It will last 90 minutes (one and a half hours). People who attend will receive \$125 to thank them for their time.

Would you be interested in taking part in this study?

Yes	1	
No	2	THANK & TERMINATE

23. The discussion group will be video-recorded. These recordings are used to help with analyzing the findings and writing the report. The results from the discussions will be grouped together in the research report, which means that individuals will not be identified in anyway. Neither your name nor your specific comments will appear in the research report. Is this acceptable?

Yes	1	
No	2	THANK & TERMINATE

24. There will be some people from the Government of Canada, and other individuals involved in this project observing the session. They will not take part in the discussion and they will not know your name. Is this acceptable?

Yes	1	
No	2	THANK & TERMINATE

25. Thank you. Just to make sure, the group will take place on [DAY OF WEEK], [DATE], at [TIME] and it will last 90 minutes (one and a half hours). Following your participation, you will receive \$125 to thank you for your time. Are you interested and available to attend?

Yes	1	
No	2	THANK & TERMINATE

To conduct the session, we will be using a screen-sharing application called **Zoom**. **We will need to send you by email the instructions to connect.** The use of a computer, tablet or a smartphone in a quiet room is necessary.

We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 to 15 minutes prior to your session.

As we are only inviting a small number of people to attend, your participation is very important to us. If for some reason you are unable to attend, **you cannot send someone to participate on your behalf** - please call us so that we can get someone to replace you. You can reach us at [INSERT NUMBER] at our office. Please ask for [INSERT NAME].

So that we can contact you to remind you about the focus group or in case there are any changes, can you please confirm your name and contact information for me? **[READ INFO AND CHANGE AS NECESSARY.]**

First name _____

Last Name _____

Email _____

Day time phone number _____

Night time phone number _____

Thank you!

If the respondent refuses to give his/her first or last name or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the focus group. If they still refuse THANK & TERMINATE.

Appendix B: Moderation Guide

Moderation Guide

Public Safety Canada - POR on Motivations of Cannabis Users Who Obtain Cannabis from Sources Other Than Legal/Licensed Sources – 2023

Introduction to procedures (15 minutes)

Thank you all for joining this online focus group!

- Introduce moderator/firm and welcome participants to the focus group.
 - Thanks for attending.
 - My name is [INSERT MODERATOR NAME] and I work with Quorus Consulting, and we are conducting research on behalf of the Government of Canada, and more specifically the department called Public Safety Canada.
 - Today we will focus on understanding where Canadians who consume cannabis products choose to obtain these products.
 - The discussion will last approximately 90 minutes.
 - If you have a cell phone or other electronic device, please turn it off.
- Describe focus group.
 - A discussion group is a “round table” discussion, meaning we will discuss something and everyone has an equal chance to express an opinion. We may also be asking you to answer survey questions from time to time to help guide the discussion.
 - My job is to facilitate the discussion, keeping us on topic and on time.
 - Your job is to offer your opinions on the topics I’ll be presenting to you tonight/today.
 - Your honest opinion is valued. There are no right or wrong answers. This is not a knowledge test.
 - Everyone’s opinion is important and should be respected.
 - We want you to speak up even if you feel your opinion might be different from others. Your opinion may reflect that of other consumers.
 - To participate in this session, please make sure your webcam and your microphone are on and that you can hear me clearly. If you are not speaking, I would encourage you to mute your line to keep background noise to a minimum...just remember to remove yourself from mute when you want to speak!

- We might use the chat function. **[MODERATOR EXPLAINS HOW TO ACCESS THE ZOOM CHAT FEATURE DEPENDING ON THE DEVICE THE PARTICIPANT IS USING]**. Let's do a quick test right now - please open the chat window and send the group a short message (e.g., Hello everyone). If you have an answer to a question and I don't get to ask you specifically, please type your response in there. We will be reviewing all chat comments at the completion of this project.
- Explanations.
 - Please note that anything you say during these groups will be held in the strictest confidence. We do not attribute comments to specific people. Our report summarizes the findings from the groups but does not mention anyone by name. Please do not provide any identifiable information about yourself.
 - The final report for this session, and others, can be accessed through the Library of Parliament and Library and Archives Canada's website.
 - Your responses will in no way affect your dealings with the Government of Canada.
 - The session is being audio-video recorded for report writing purposes / verify feedback. These recordings are stored for up to 6 months and then destroyed.
 - Some of my colleagues involved in this project are watching this session and this is only so they can hear the comments first-hand.
- Please note that I am not an employee of the Government of Canada and may not be able to answer questions about what we will be discussing. If questions do come up over the course of the group, we will try to get answers for you before we wrap up the session.

Any questions?

INTRODUCTIONS: Let's go around – please tell us your name and a little bit about yourself such as where you live, who lives with you, what you do for a living, etc.

Section 1: Reasons for using cannabis and format preferences (15 minutes)

As you know, the main topic for today is cannabis. Just so we are clear, when I refer to cannabis, I am referring to all it's shapes and forms, irrespective of where or how you get it and irrespective of what name you might use instead of cannabis.

As well, everyone in this group uses cannabis so I'll be eager to hear from all of you on the many questions I'll have today even though we may not have time to hear from everyone on every single question.

1. Let's start with a really broad discussion – why do you use cannabis?
2. Tell me about the type of setting or situations in which you usually use cannabis.
 - Do you typically use cannabis with others or alone? Tell me a bit about this.
 - And how often do you use cannabis?
3. What are your preferred ways of consuming cannabis, and has this changed at all over the years?
 - **IF THERE HAS BEEN A CHANGE OVER THE YEARS:** Help me understand what is behind this change.
 - Does the type of product you like to consume vary at all based on the situation/ setting you are in?

Section 2: Exploring cannabis product sources (30 minutes)

4. Research shows that individuals who use cannabis in Canada obtain their products from a wide range of sources. Let's talk a little bit about where or how you typically get your cannabis products. Walk me through this.

[IF NEEDED: Do you buy your own, grow your own, does someone get it for you or give it to you, is it retail, or do you get some or all of it somewhere else?]

- **AS NEEDED:** Just so we are clear – when you say you buy it at or from a store – is that a “brick and mortar” store or do you buy online?

- There are so many ways that one can obtain cannabis products these days – why do you choose to obtain your products those ways/that way?
 - What is/are your preferred way(s) to get your cannabis? Help me understand that preference.
 - When it comes to where you obtain your cannabis products, has any of this changed at all over time?
 - How, if at all, has legalization had an impact on where you get your cannabis?
 - Among the sources you use to obtain you cannabis products, which one(s) are considered legal, which one(s) are not?
5. As you might know, only cannabis products that come from government-regulated, authorized retailers is legal. Cannabis products from all other sources is not regulated and is considered illegal cannabis.
- Is anyone surprised by this? Why?
 - For those who use cannabis obtained from both government-regulated, authorized retailers, whether that be at a store or online, AND other sources, how do you decide where to get it on a given day?
 - Describe a situation where you may choose to go to an authorized retailer to purchase cannabis.
 - How about a time where you might choose a source other than an authorized retailer?

6. How confident are you that you can identify an authorized retailer?
 - How do you determine that a **brick and mortar retailer** is in fact an authorized retailer?
 - How do you determine that an **online retailer** is in fact an authorized retailer?
 - Have you ever been unsure? Tell me a bit more about those times you were unsure.
 - Did you still go ahead with the purchase even though you were unsure? Why is that?
7. Have you ever searched for information about where to purchase legal cannabis products or to help you understand the difference between what is legal and what is not?
 - Where did you look?
 - Did you find any useful information?
 - Was it easy to understand?
8. How important is it to you that the products you are using come from an authorized source? ...what difference does it make to you?
9. On your screen you will see a description of what legal cannabis products from authorized retailers look like.

[MODERATOR TO SHARE ON SCREEN THE FOLLOWING TEXT]

What does a legal cannabis product from an authorized retailer look like?

The product package will establish if you are buying a “legal” product – it should show an excise stamp which is a different colour for each province and territory but uses a standard cannabis symbol, a mandatory health warning message, and the packaging should be plain-looking and child-resistant.



How do I know if the retailer is authorized?

If the retailer does not verify age, has appealing packaging or products that mimic popular candies, ships everywhere in Canada, has referral or sign-up bonuses or promotions, accepts virtual currencies (illicit online retailers) **they are not likely an authorized retailer.**

- Is this consistent with what you thought?
- Are you learning anything new here, and if so, what?

Section 3: Cannabis source selection key drivers (20 minutes)

10. I'd like to get back to some of the reasons that explain why you might obtain some of your cannabis products from a source other than an authorized retailer. Let's make a list of factors that answer one of the questions at the top of the slide.

[MODERATOR SHARES WHITEBOARD WITH PARTICIPANTS AND CREATES A LIST OF FACTORS IN RESPONSE TO THE FOLLOWING QUESTIONS:

Why do you get some of your cannabis products from sources other than an authorized retailer? / Why do you not purchase all your cannabis products from an authorized retailer?]

EXPLORE THE FOLLOWING THEMES AS APPLICABLE:

- Some of you referred to **price** – please expand on that a bit.
 - How much of a difference are we talking about?
 - How close in price do you feel the regulated product would need to be for you to switch?
- Some of you also mentioned “**quality**” – what does that mean exactly?
 - How does quality differ between cannabis from authorized retailers and cannabis from a source other than an authorized retailer?
- Some of you referred to **THC content** – please expand on that a bit.
 - How much of a difference are we talking about?
- How about **accessibility**? Is this a factor at all?
 - Do you have any issues accessing cannabis from authorized retailers? If so, what?

11. Let’s explore the remaining factors. **[MODERATOR TO EXPLORE ANY OTHER FACTOR ON THE LIST]**

12. So we have a good list in front of us here – what is the factor that carries the most weight in your decision to obtain some of your cannabis products from a source other than an authorized retailer? **[MODERATOR TO GET AN ANSWER FROM EACH PARTICIPANT AND PUT A STAR NEXT TO FACTOR AS THEY ARE MENTIONED]**

Section 4: Concerns regarding non-regulated cannabis (10 minutes)

13. When it comes to obtaining cannabis from a source other than an authorized retailer, do you have any concerns for yourself or others?

- Any personal health concerns?
- Public or personal safety concerns?
- Legal consequences?
 - How strict do you feel the police is when it comes to enforcing cannabis laws?
- Do you see any connection to obtaining cannabis from a source other than an authorized retailer and organized crime?

14. What would need to happen in order for you to stop purchasing cannabis from sources other than an authorized retailer?

- Do you feel that there could be improvements to accessing cannabis from authorized retailers?

Wrap-up (2 minutes)

Thanks again! The team that invited you to participate in this session will contact you regarding the manner in which you can receive the incentive we promised you.

ON BEHALF OF THE GOVERNMENT OF CANADA, THANK YOU FOR YOUR PARTICIPATION