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Abstract | This study uses data from the Drug Use Monitoring in Australia program to examine the impact of the COVID-19 pandemic on cannabis demand and supply in Australia. It found past-month cannabis users reported using cannabis on a median of 25 days per month, significantly more often than before the pandemic. Those experiencing changes in their employment, financial or living situation or mental health or who used drugs to cope with negative emotions were more likely to increase cannabis use. Most users reported no changes in cannabis supply, but there were increasing prices and decreasing numbers of dealers in Brisbane.

Impact of the COVID-19 pandemic on cannabis demand and supply in Australia

Laura Doherty, Tom Sullivan and Alexandra Voce

While illicit drug markets are generally resilient to external pressures (Bouchard 2007), Australia has experienced periodic large and unexpected changes to the supply of illicit drugs, resulting in increasing prices and decreasing drug-related harms. For example, in the early 2000s Australia experienced a significant reduction in the supply of heroin (the 'heroin drought') which led to a sharp increase in the purity-adjusted price of heroin and a decline in heroin overdoses (Moore et al. 2005).

Restrictions introduced to curb the spread of the coronavirus disease COVID-19 in Australia and overseas appear to have recently disrupted the supply of illicit drugs in a similar manner (European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) 2020; Peacock et al. 2020; Voce et al. 2020). These changes appear to vary for different drugs and have been location specific. For example, wastewater data suggest Australian capital cities experienced a decrease in cannabis and methamphetamine use and an increase in heroin use in the early stages of the pandemic (Australian Criminal Intelligence Commission (ACIC) 2020). In contrast, there has been an increase in cannabis, methamphetamine and heroin use in regional areas of Australia (ACIC 2020). Similarly, international evidence has shown an overall decrease in drug use in Europe over the first three months of the COVID-19 pandemic (EMCDDA 2020). This was attributed to the closure of the night-time economy and reduced availability of illicit drugs (EMCDDA & Europol 2020). Over this time there was a parallel increase in the price of illicit drugs (EMCDDA & Europol 2020).

This study explores changes in the demand for and supply of cannabis in Perth, Brisbane, Adelaide and Sydney during the COVID-19 pandemic.

Method

This study used self-report data from the Australian Institute of Criminology's Drug Use Monitoring in Australia (DUMA) program, which collects information from police detainees about their drug use, criminal offending and sociodemographic characteristics (Doherty & Sullivan 2020). These data were obtained in July and August 2020 from the core DUMA survey and a specially-designed COVID-19 addendum. The survey interviewed 446 police detainees in Perth, Brisbane, Adelaide and Sydney. Most respondents were men (85%, $n=381$) and non-Indigenous (70%, $n=313$), and they had a median age of 34 years (mean=35 years, interquartile range (IQR)=27–42).

Analysis

This bulletin presents two sets of analyses to better understand the cannabis market during the pandemic. The first analysis examined patterns of cannabis use (including frequency and quantity of use) and perspectives on the market (including availability, quality, price and number of dealers) of DUMA detainees who had used cannabis in the 30 days before interview (referred to as past-month users; $n=214$). These data were compared with averaged data collected every six months under the DUMA program between July–August 2017 and January–February 2020. This pre-pandemic reference period allowed the authors to account for seasonal variations in drug use patterns (eg higher rates of drug use during summer holidays) and to include January 2020, the period immediately preceding the COVID-19 outbreak in Australia.

The second analysis focused on DUMA detainees who had used cannabis in the early stages of the pandemic in April or May 2020 ($n=192$). It investigated the extent to which this group (referred to as April–May cannabis users) believed their patterns of drug use and the cannabis market had changed compared with before the pandemic. Ninety percent ($n=172$) of this group were also past-month cannabis users examined in the first analysis. The April–May cannabis users were asked questions such as whether they had obtained larger quantities of cannabis than usual to ensure they did not run out of personal supplies, and whether they had used other drugs as a substitute because of difficulties obtaining cannabis.

Pearson's chi-square tests (χ^2) were used to identify relationships between categorical variables, with Fisher's exact test used when one or more of the cells had an expected frequency of five or less. Wilcoxon's rank-sum test was used to identify differences in median values between groups (ie before and during the pandemic). Effect size is reported for statistically significant findings, using phi (ϕ) or Cramér's V for binary variables and Cohen's d for continuous variables. To preserve the largest sample size possible, detainees were excluded from analysis only for variables for which data were missing, or if the detainee provided a 'don't know' response.

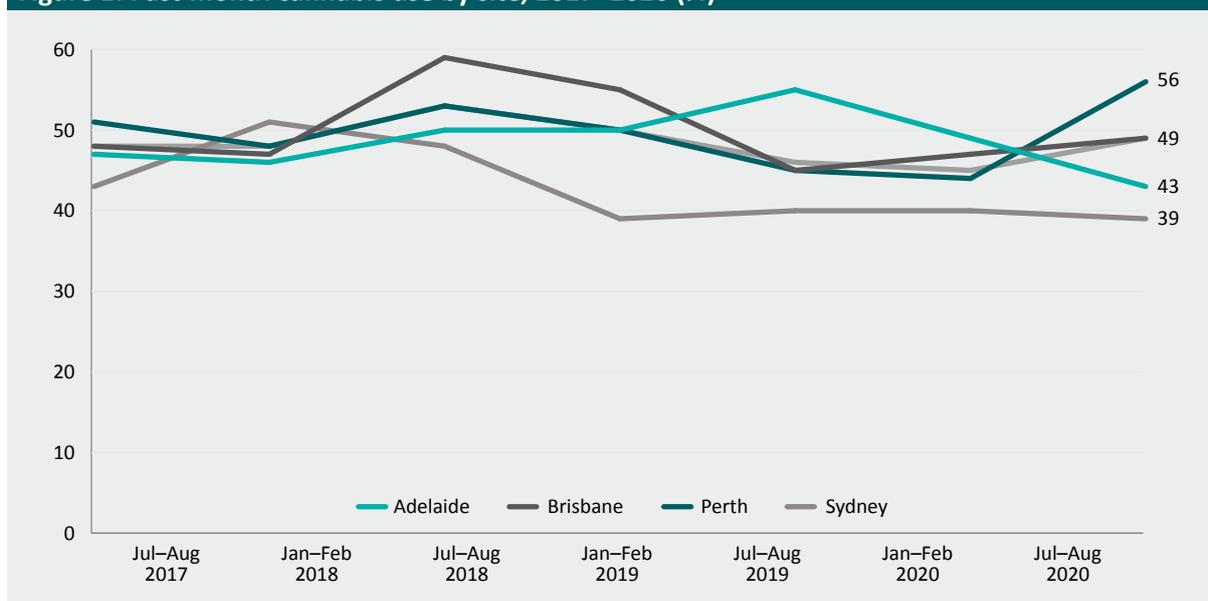
Results

Cannabis demand

Prevalence of past-month use

Almost half of the detainees interviewed in July and August 2020 reported using cannabis in the 30 days before interview (49%, $n=214$). The same proportion had used cannabis before the pandemic (49%, $n=1,669$). Compared with before the pandemic, past-month cannabis use increased in Perth (48%, $n=573$ vs 56%, $n=81$), decreased in Adelaide (49%, $n=372$ vs 43%, $n=40$) and Sydney (44%, $n=183$ vs 39%, $n=22$), and remained stable in Brisbane (50%, $n=541$ vs 49%, $n=71$). Changes were not statistically significant. In July and August 2020, Perth detainees were significantly more likely to report past-month cannabis use than detainees at other sites (56%, $n=81$ vs 45%, $n=133$; $\chi^2(1)=4.83$, $p=0.028$, $\phi=0.10$; see Figure 1).

Figure 1: Past-month cannabis use by site, 2017–2020 (%)



Source: AIC DUMA 2017–20 [computer file]; see Table A1

Frequency of use

In July and August 2020 past-month cannabis users reported using cannabis on a median of 25 days per month (IQR=5–30), significantly more often than before the pandemic (median=15 days, IQR=4–29; $z=-3.12$, $p=0.002$, $d=-0.23$; see Table 1). Compared with before the pandemic, there were significant increases in median days of use among detainees in Perth (median=15, IQR=4–30 vs median=28, IQR=5–30; $z=-2.29$, $p=0.022$, $d=-0.26$) and Brisbane (median=15, IQR=3–28 vs median=27, IQR=5–29; $z=-2.42$, $p=0.016$, $d=-0.28$). There were no significant changes in median days of use among detainees in Adelaide or Sydney.

Table 1: Frequency of cannabis use before and during the pandemic

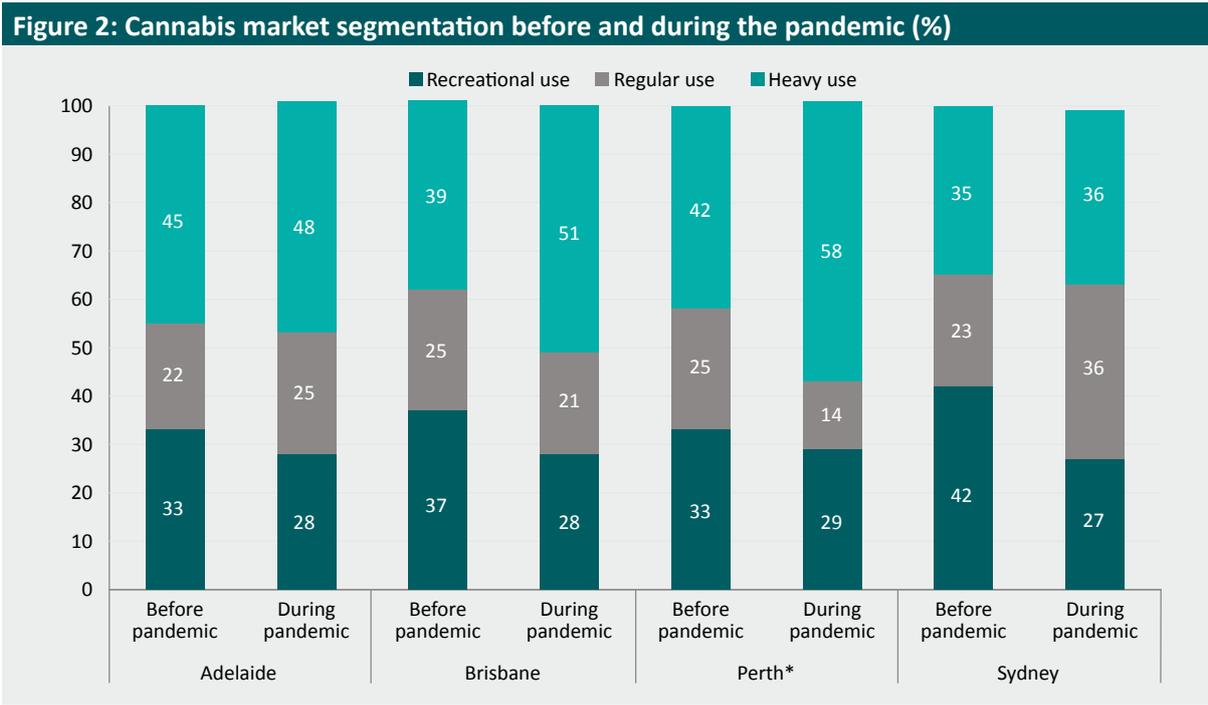
	Adelaide		Brisbane		Perth		Sydney		Total	
	Median	IQR	Median	IQR	Median	IQR	Median	IQR	Median	IQR
Days of use (frequency)										
During pandemic	20	5–29	27*	5–29	28*	5–30	17	5–30	25**	5–30
Before pandemic	15	4–30	15*	3–28	15*	4–30	10	3–30	15**	4–29

**statistically significant at $p<0.01$, *statistically significant at $p<0.05$

Note: IQR=interquartile range

Source: AIC DUMA collection 2017–20 [computer file]

Nationally, past-month cannabis users were significantly more likely to be heavy users during the pandemic than before (51%, $n=109$ vs 41%, $n=678$; $\chi^2(2)=8.16$, $p=0.017$, $V=0.07$) and less likely to be recreational (28%, $n=60$ vs 35%, $n=580$) or regular users (21%, $n=44$ vs 24%, $n=397$). Perth detainees in particular were significantly more likely to be heavy users during the pandemic than before (58%, $n=46$ vs 42%, $n=238$; $\chi^2(2)=7.59$, $p=0.023$, $V=0.11$; see Figure 2). There were no significant differences in these proportions among detainees in Brisbane, Adelaide or Sydney, and no significant differences between sites.



*statistically significant at $p < 0.05$

Source: AIC DUMA collection 2017–20 [computer file]; see Table A2

April–May cannabis users who reported a change in their employment, financial or living situation during the pandemic were significantly more likely than detainees who reported no change to increase their frequency of cannabis use (33%, $n=27$ vs 17%, $n=17$; $\chi^2(2)=7.19$, $p=0.027$, $V=0.20$).

April–May cannabis users who reported a positive or negative change in their mental health (measured by feelings of stress, anxiety or other negative emotions) were also significantly more likely than detainees who reported no change to increase their frequency of cannabis use (35%, $n=35$ vs 12%, $n=9$; $\chi^2(2)=17.05$, $p < 0.001$, $V=0.31$), as were those who reported using drugs to cope with negative emotions (35%, $n=34$ vs 11%, $n=9$; $\chi^2(2)=15.96$, $p < 0.001$, $V=0.30$).

Quantity of use

Past-month cannabis users interviewed in July and August 2020 reported using a median of 0.34 grams (IQR=0.18–1.00) of cannabis during a typical session (see Table 2). This was the same quantity consumed by past-month cannabis users interviewed before the pandemic (median=0.34, IQR=0.17–0.90). There were no significant differences in quantities used before or during the pandemic at any site.

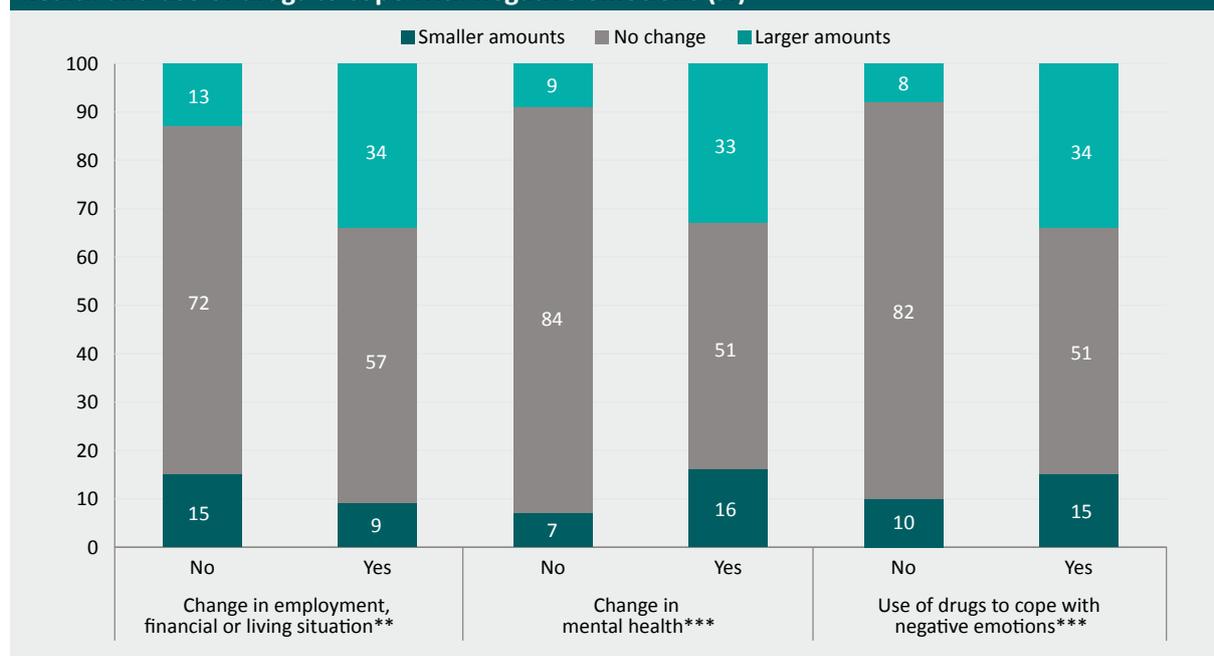
	Adelaide		Brisbane		Perth		Sydney		Total	
	Median	IQR	Median	IQR	Median	IQR	Median	IQR	Median	IQR
Grams used per session (quantity)										
During pandemic	0.2	0.1–0.3	0.5	0.3–1.3	0.3	0.2–1.0	0.4	0.3–1.0	0.3	0.2–1.0
Before pandemic	0.2	0.1–0.3	0.5	0.2–1.0	0.3	0.2–1.0	0.3	0.2–1.0	0.3	0.2–0.9

Note: IQR=interquartile range

Source: AIC DUMA collection 2017–20 [computer file]

Most April–May cannabis users also reported no change in their quantity of use compared with before the pandemic (65%, $n=123$; see Table A3). However, April–May users who reported using greater quantities of cannabis were significantly more likely to have experienced a change in their employment, financial or living situation (34%, $n=28$ vs 13%, $n=13$; $\chi^2(2)=11.79$, $p=0.003$, $V=0.26$) or mental health (33%, $n=34$ vs 9%, $n=7$; $\chi^2(2)=21.44$, $p<0.001$, $V=0.35$) or to have used drugs to cope with negative emotions (34%, $n=33$ vs 8%, $n=7$; $\chi^2(2)=21.22$, $p<0.001$, $V=0.34$; see Figure 3).

Figure 3: Changes in quantity of cannabis use by changes in living situation, changes in mental health and use of drugs to cope with negative emotions (%)



***statistically significant at $p<0.001$, **statistically significant at $p<0.01$

Source: AIC DUMA collection 2020 [computer file]; see Table A3

Two-fifths of April–May cannabis users (41%, $n=78$) reported purchasing a greater quantity of cannabis than usual to avoid potential shortages (see Table A3). Brisbane cannabis users were significantly more likely than those at other sites to have purchased greater amounts of cannabis (57%, $n=34$ vs 34%, $n=44$; $\chi^2(1)=8.60$, $p=0.003$, $\phi=0.21$).

Substitution

Seventeen percent ($n=33$) of April–May cannabis users reported using other drugs as a substitute for cannabis during the pandemic (see Table A4). Brisbane cannabis users were significantly more likely than others to report using other drugs as a substitute for cannabis (27%, $n=16$ vs 13%, $n=17$; $\chi^2(1)=5.17$, $p=0.023$, $\phi=0.17$). The most common substitute used was benzodiazepines (33%, $n=11$), followed by methamphetamine (30%, $n=10$), alcohol (15%, $n=5$), opiates (excluding heroin; 12%, $n=4$), heroin (9%, $n=3$) and anti-psychotics, inhalants and tobacco (3%, $n=1$ for each).

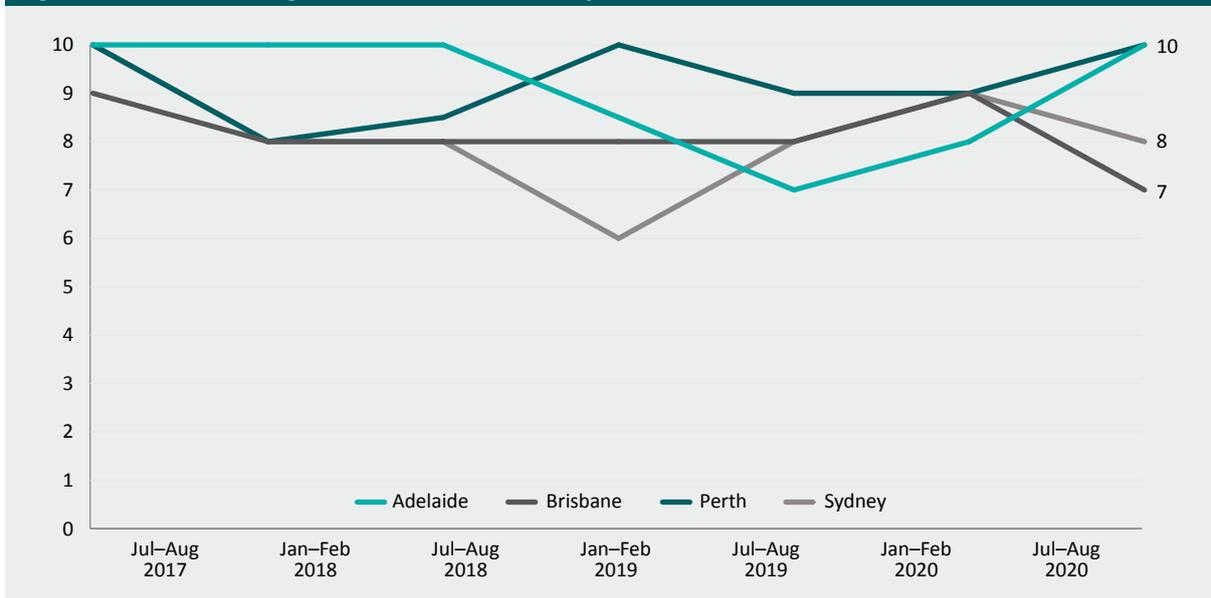
Cannabis supply

Availability

Past-month cannabis users rated the availability of cannabis on a scale from one (extremely hard or impossible to get) to 10 (readily available or overabundant). The median availability rating for cannabis in July and August 2020 was nine out of 10 (IQR=5–10), a small, non-significant increase from the pre-pandemic rating (median=8, IQR=5–10; see Table A5). Compared with before the pandemic, there were small non-significant increases in the median availability rating for cannabis in Perth (median=9, IQR=5–10 vs median=10, IQR=7–10) and Adelaide (median=9, IQR=5–10 vs median=10, IQR=6–10), a non-significant decrease in Brisbane (median=8, IQR=5–10 vs median=7, IQR=5–10) and no change in Sydney (median=8, IQR=5–10; see Figure 4).

Two-thirds of respondents who used cannabis during the pandemic (66%, $n=121$) reported no change in the availability of cannabis relative to before the pandemic (see Table A5).

Figure 4: Median ratings of cannabis availability, 2017–2020



Note: Availability ratings ranged from 1 (extremely hard or impossible to get) to 10 (readily available or overabundant)
Source: AIC DUMA collection 2017–20 [computer file]; see Table A5

Number of dealers

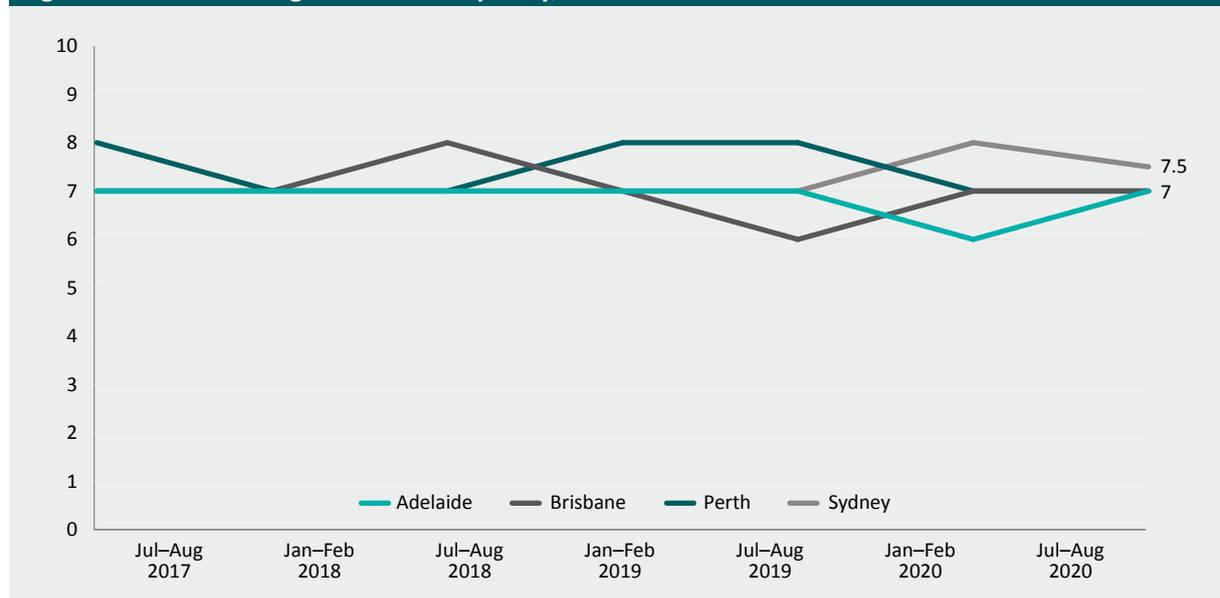
Sixty percent ($n=97$) of past-month cannabis users reported no change in the number of dealers selling cannabis in the three months before interview (see Table A6). This was a non-significant increase from the 50 percent ($n=648$) of detainees who perceived no change in the number of dealers selling cannabis three months prior to interview before the pandemic. In July and August 2020, Perth detainees were significantly more likely than detainees in other cities to report an increase in the number of dealers (26%, $n=17$ vs 14%, $n=14$; $\chi^2(2)=7.20$, $p=0.027$, $V=0.21$), whereas Brisbane detainees were significantly more likely to report a decrease (36%, $n=20$ vs 14%, $n=15$; $\chi^2(2)=11.33$, $p=0.003$, $V=0.26$).

Quality

The median quality rating for cannabis in July and August 2020 was seven out of 10 (IQR=5–9), consistent with before the pandemic (median=7, IQR=5–9; see Table A7). There was no change in the median quality ratings before and during the pandemic at any site except Sydney, which had a small, non-significant increase (median=7, IQR=6–9 vs median=7.5, IQR=5–9; see Figure 5).

Almost three-quarters of April–May cannabis users (74%, $n=136$) reported no change in the quality of cannabis (see Table A7). Sydney detainees were significantly less likely to report stability in the quality of cannabis compared with detainees at other sites (52%, $n=11$ vs 77%, $n=125$; Fisher’s exact $p=0.037$, $V=0.18$).

Figure 5: Median ratings of cannabis quality, 2017–2020



Note: Quality ratings ranged from 1 (extremely poor quality or purity) to 10 (excellent quality or purity)

Source: AIC DUMA collection 2017–20 [computer file]; see Table A7

Price

Most April–May cannabis users (78%, $n=142$) reported no change in the price of cannabis relative to before the pandemic. One in five detainees reported that cannabis was more expensive (19%, $n=34$). Detainees in Perth were significantly more likely to report stability in the price of cannabis compared with detainees from other sites (92%, $n=58$ vs 71%, $n=84$; Fisher's exact $p=0.002$, $V=0.25$), whereas detainees in Brisbane were significantly more likely to report an increase in the price (31%, $n=18$ vs 13%, $n=16$; Fisher's exact $p=0.002$, $V=0.26$). There were no statistically significance differences for Adelaide or Sydney.

Discussion

This study suggests patterns of cannabis use may have been altered by COVID-19 restrictions, but that cannabis supply appears to have been resistant to the impacts of the pandemic. While there was no change in the proportion of detainees reporting past-month cannabis use, their frequency of cannabis use was significantly greater than before the pandemic. This is consistent with other research suggesting an overall increase in frequency of cannabis use during the pandemic in Australia (Peacock et al. 2020; Sutherland et al. 2020) and internationally (EMCDDA 2020). The National Wastewater Drug Monitoring Program also found an increase in cannabis consumption, reaching a record high in capital cities in June 2020 (ACIC 2020).

Increases in the frequency and quantity of cannabis use were significantly more likely to occur among detainees who had experienced changes in their employment, financial or living situation; who experienced changes in their mental health; or who used drugs to cope with negative emotions. These results are consistent with Peacock et al.'s (2020) findings that cannabis users were likely to attribute increases in drug use to feelings of boredom (74%), an increase in available time to use the drug (38%) and greater anxiety or depression associated with COVID-19 (11%). These findings suggest it may be important to ensure support services for cannabis use are available to those who have experienced changes in their life associated with the pandemic.

Other factors may also explain the increase in cannabis use during the pandemic. Economic changes such as increases to income support and policies such as early access to superannuation may have provided some respondents with greater income and increased demand for cannabis. Detainees may also have bought more cannabis as a substitute for methamphetamine following a rise in the price of methamphetamine (Voce, Sullivan & Doherty 2021).

Cannabis supply appeared to remain stable during the pandemic. Most cannabis users reported no change in availability or quality compared with before the pandemic. Four out of five cannabis users also reported no change in the price of cannabis, and three out of five cannabis users reported no change in the number of dealers selling cannabis. The small non-significant increase in cannabis availability reported by detainees may have reflected a change in the quantity of cannabis supplied as prices rose due to the increase in demand. The price of cannabis appeared to fluctuate more in Brisbane than elsewhere, and more detainees in Brisbane reported a decrease in the number of cannabis dealers compared with before the pandemic and compared to other sites. This suggests the cannabis market in Brisbane may have been impacted by the pandemic more than markets in other cities.

The overall stability in the supply of cannabis aligns with other Australian research (ACIC 2020; Peacock et al. 2020; Sutherland et al. 2020). For example, 90 percent of those interviewed between June and September 2020 for the Adapting to Pandemic Threats study reported that cannabis was easy or very easy to obtain (Sutherland et al. 2020). The cannabis market may have been less disrupted during the COVID-19 pandemic than other drug markets because cannabis cultivation occurs domestically, rather than relying on drugs being produced internationally and trafficked into the country (ACIC 2020).

Despite this stability, two in five detainees purchased larger quantities of cannabis than usual because they anticipated a possible decrease in supply due to the pandemic. Seventeen percent of cannabis users also reported using other drugs as a substitute for cannabis, with benzodiazepines and methamphetamine common substitutes for cannabis. These results are concerning, as the risk of drug overdose may be increased when an individual has access to a large personal supply of a drug (Dietze & Peacock 2020), uses a new substance for the first time, or uses multiple drugs simultaneously or concurrently within a brief period (Lalica et al. 2018).

This study suggested that overall cannabis availability and price did not change substantially. However, the amount of cannabis consumed appeared to increase. Detainees who increased the quantity of cannabis they used were more likely to have experienced economic and psychological changes during the pandemic, highlighting the importance of targeting support services to these individuals.

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Appendix

Table A1: Prevalence of past-month cannabis use compared with before the pandemic										
	Adelaide		Brisbane		Perth		Sydney		Total	
	<i>n</i>	%								
During pandemic	40	43	71	49	81	56	22	39	214	49
Before pandemic	372	49	541	50	573	48	183	44	1,669	49

Source: AIC DUMA collection 2017–20 [computer file]

Table A2: Frequency of cannabis use compared with before the pandemic										
Market segmentation	Adelaide		Brisbane		Perth		Sydney		Total	
	<i>n</i>	%								
Recreational use										
During pandemic	11	28	20	28	23	29	6	27	60	28
Before pandemic	121	33	198	37	184	33	77	42	580	35
Regular use										
During pandemic	10	25	15	21	11	14	8	36	44	21
Before pandemic	83	22	133	25	139	25	42	23	397	24
Heavy use										
During pandemic	19	48	36	51	46	58	8	36	109	51
Before pandemic	167	45	209	39	238	42	64	35	678	41
Changes in frequency of cannabis use since the beginning of the pandemic										
Used less often	2	5	10	17	8	13	7	32	27	14
No change in use	27	63	34	58	44	69	12	55	117	62
Used more often	14	33	15	25	12	19	3	14	44	23

Note: Excludes 'don't know' responses. Sample size may vary as cases were excluded due to missing data

Source: AIC DUMA collection 2017–20 [computer file]

Table A3: Quantity of cannabis use										
	Adelaide		Brisbane		Perth		Sydney		Total	
	<i>n</i>	%								
Changes in quantity of cannabis used per session since the beginning of the pandemic										
Smaller amounts	2	5	9	15	6	9	5	23	22	12
No change	27	63	35	59	48	75	13	59	123	65
Larger amounts	14	33	15	25	10	16	4	18	43	23
Purchased larger quantities of cannabis during the pandemic										
Yes	14	33	34	57	22	34	8	38	78	41
No	29	67	26	43	43	66	13	62	111	59

Note: Excludes 'don't know' responses. Sample size may vary as cases were excluded due to missing data

Source: AIC DUMA collection 2020 [computer file]

Table A4: Use of other drugs as a substitute for cannabis										
	Adelaide		Brisbane		Perth		Sydney		Total	
	<i>n</i>	%								
Yes	4	9	16	27	7	11	6	27	33	17
No	39	91	44	73	57	89	16	73	156	83

Note: Excludes 'don't know' responses

Source: AIC DUMA collection 2020 [computer file]

Table A5: Cannabis availability										
	Adelaide		Brisbane		Perth		Sydney		Total	
	Median	IQR								
Current availability (on a scale from 1–10)										
During pandemic	10	6–10	7	5–10	10	7–10	8	5–10	9	5–10
Before pandemic	9	5–10	8	5–10	9	5–10	8	5–10	8	5–10
	<i>n</i>	%								
Availability compared to before the pandemic										
Harder to get	10	24	18	31	11	17	5	23	44	24
No change	26	63	34	59	46	73	15	68	121	66
Easier to get	5	12	6	10	6	10	2	9	19	10

Note: Availability ratings ranged from 1 (extremely hard or impossible to get) to 10 (readily available or overabundant). IQR=interquartile range. Excludes 'don't know' responses

Source: AIC DUMA collection 2020 [computer file]

Table A6: Changes in number of cannabis dealers compared with before the pandemic										
	Adelaide		Brisbane		Perth		Sydney		Total	
	<i>n</i>	%								
Decreased										
During pandemic	3	11	20	36	8	12	4	25	35	21
Before pandemic	69	27	124	28	94	20	39	29	326	25
No change										
During pandemic	19	70	28	51	40	62	10	63	97	60
Before pandemic	131	51	226	51	225	49	66	49	648	50
Increased										
During pandemic	5	19	7	13	17	26	2	13	31	19
Before pandemic	56	22	94	21	141	31	30	22	321	25

Note: Excludes 'don't know' responses

Source: AIC DUMA collection 2017–20 [computer file]

Table A7: Cannabis quality										
	Adelaide		Brisbane		Perth		Sydney		Total	
	Median	IQR								
Current quality (on a scale from 1–10)										
During pandemic	7	6–9	7	5–9	7	5–9	7.5	5–9	7	5–9
Before pandemic	7	5–8	7	5–9	7	5–9	7	6–9	7	5–9
	<i>n</i>	%								
Quality compared to before the pandemic										
Lower	4	10	14	24	8	13	6	29	32	17
No change	36	86	38	64	51	82	11	52	136	74
Higher	2	5	7	12	3	5	4	19	16	9

Note: Quality ratings ranged from 1 (extremely poor quality or purity) to 10 (excellent quality or purity). IQR=interquartile range. Excludes 'don't know' responses

Source: AIC DUMA collection 2020 [computer file]

Table A8: Changes in cannabis price compared with before the pandemic										
	Adelaide		Brisbane		Perth		Sydney		Total	
	<i>n</i>	%								
Less expensive	1	3	4	7	0	0	1	5	6	3
No change	35	88	37	63	58	92	12	60	142	78
More expensive	4	10	18	31	5	8	7	35	34	19

Note: Excludes 'don't know' responses

Source: AIC DUMA collection 2017–20 [computer file]

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