

Legal cannabis in Canada: 5 years later

Tracking public and user perceptions, attitudes, and behaviours – five years after legalization in October 2018

Fall 2023

pollara
strategic insights

Methodology

Online survey of randomly-selected sample of **N=2,006** adult (18+) Canadians

Field Window: September 15 to 27, 2023.

Reliability: Non-probability samples cannot be assigned a margin of error. *As a relative guideline, we have provided margins of error for a probability sample of this size. Discrepancies in totals are due to rounding.

The dataset has been weighted according gender, age, and region, to ensure sample reflects actual population of adult Canadians.

Region	Number of Interviews (Weighted)	Number of Interviews (unweighted)	Margin of error*
British Columbia	279	350	± 5.2%
Alberta	223	251	± 6.2%
Saskatchewan	65	126	± 8.7%
Manitoba	64	125	± 8.8%
Ontario	777	603	± 4.0%
Quebec	463	400	± 4.9%
Atlantic Canada	135	151	± 8.0%
Canada	2,006	2,006	± 2.2%

Key insights

Public Approval and Perceptions re: Cannabis Legalization

- 5 years after the legalization of cannabis on October 18, 2018, the public continues to largely accept legalization (72%), with 52% expressing outright approval, 20% ambivalent, and 23% disapproving. These levels have remained steady since 2020.
- Public acceptance is calculated by combining approval and ambivalence, as the ambivalent cohort effectively provides tacit approval, tends to exhibit more positive perceptions of cannabis and legalization, and tends to express approval when forced to choose.
- After legalization of cannabis, the incidence of negative public perceptions is far below the pessimistic expectations recorded prior to October 2018.
- While perceptions regarding economy, tax revenues and reputation are more positive than negative, the health impacts on adults, youth and children and road safety are still looked at through a net negative lens. However, the incidence of negative perceptions is much lower than the public's pre-legalization expectations.

Key insights

Public Concerns re: Cannabis Legalization

- While many feel that legalization has caused an increase in the number of cannabis users and usage frequency, this proportion is notably lower than the number of Canadians who expected such an increase prior to legalization. That said, there is a notable increase in the proportion of people that report smelling marijuana in public and seeing people 'high' in public compared to 2021.
- Although, the perceived prevalence of drug-impaired driving is significantly lower compared to pre-legalization expectations, it is still relatively high.
- About three-in-ten Canadians feel legalization has resulted in increased crime (roughly matching expectations), but about one-in-ten feel it has caused a decrease.
- Seven-in-ten feel the number of stores selling recreational cannabis have increased since its legalization, but a third also believe the number of illegal stores have increased.

Key insights

Cannabis Usage Prevalence and Patterns

- 5 years since legalization, over a quarter (27%) of Canadians report using cannabis in some form in the past 12 months – representing a 2-point increase from July 2022, a 9-point increase since March 2019, and a doubling of reported levels pre-legalization (+14 points).
 - One-in-ten (11%) of all adult Canadians – including two-in-ten (21%) cannabis users – report having only used cannabis since legalization.
- Those who have used cannabis both before and since legalization are more likely to report a reduced usage frequency now than before legalization, but half report that their usage frequency has stayed the same.



Key insights

Cannabis User Purchase Patterns

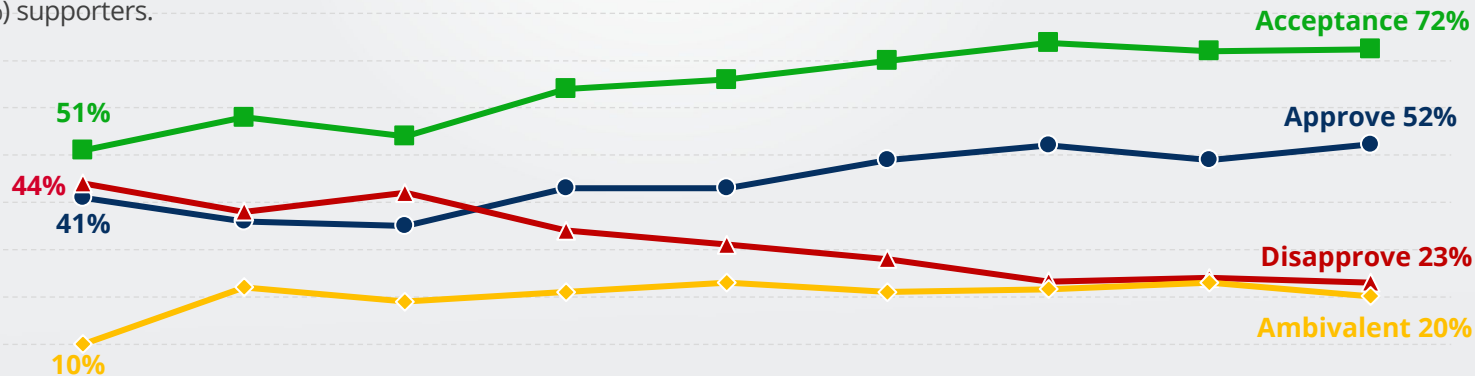
- Dry bud remains the most frequently used format amongst past 12-month users, followed by edibles. However, when considering all formats used in the past 12 months – regardless of frequency – edibles are now slightly ahead of dry bud.
- Eight-in-ten (82%) past 12-month users report buying legal, with two-thirds (65%) saying they only buy legal – a 7-point increase in legal buying since Nov 2022 and a 15-point increase since Mar 2021. One-in-ten (13%) report buying illegal – with 4% reporting that they buy illegal only, close to our Nov 2022 sounding.
 - About a quarter report not buying cannabis themselves – 21% report being given it by others or growing it legally themselves (6%).
- Past 12-month users still tend to view legal prices as higher (36%) or the same (17%) as illegal prices, but perceptions of higher prices remain significantly lower than 2019-2021 and four-in-ten are currently unsure.



Legalization of cannabis: Tracking public approval & acceptance

Three-in-four (72%) Canadians express acceptance of cannabis legalization, with about half (52%) providing approval since 2020 and and two-in-ten (20%) ambivalent since 2019. Just a quarter (23%) currently disapprove – down from 34% in 2019.

- Legalization initially occurred on October 18, 2018. By March 2019, approval levels had increased notably, continuing to current levels the following year – where they have remained steady ever since. In our most recent sounding, 27% strongly approve, 26% somewhat approve, 20% are ambivalent, 10% somewhat disapprove, and 13% strongly disapprove. Just 5% are unsure.
- Approval levels are the same across age groups, however, Gen Z and Millennials are less likely to disapprove (16%), compared to Gen Xers and Boomers (27%). Among decided voters, Liberal (63%), NDP (71%), and Green (58%) supporters are more likely to approve than Conservative (45%) and BQ (43%) supporters.

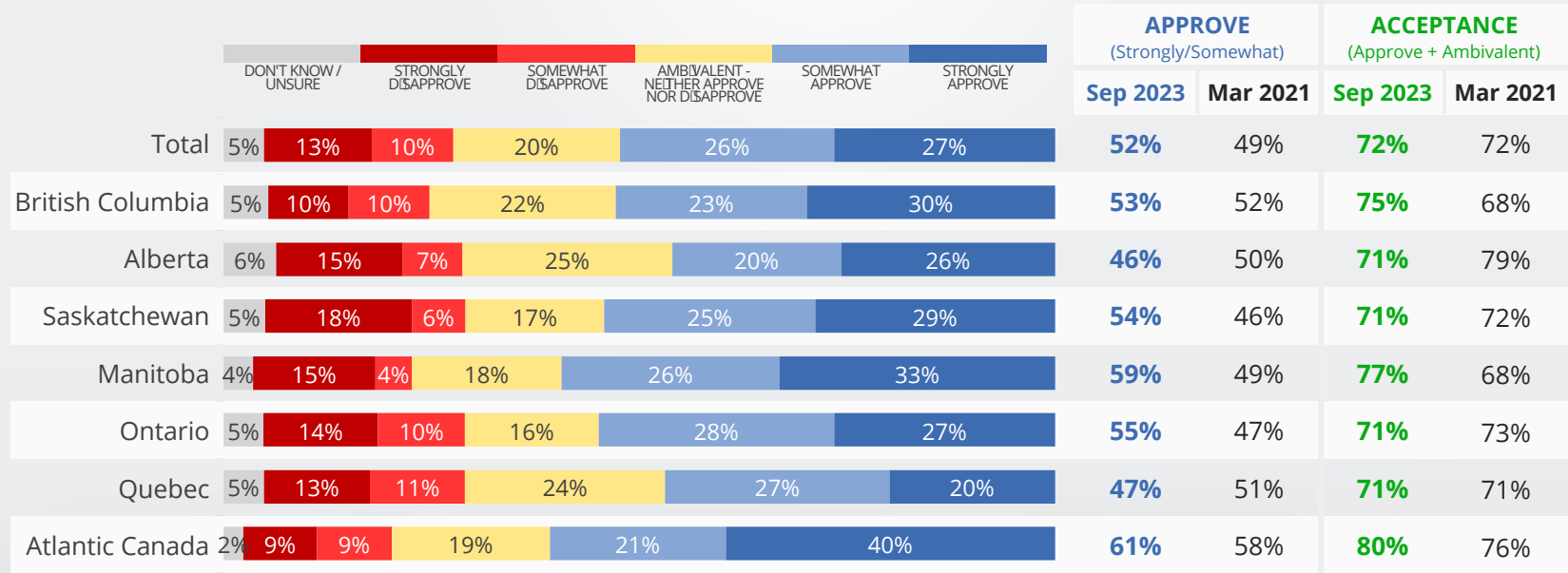


	Mar 2017	Dec 2017	Jul 2018	Mar 2019	Jan 2020	Mar 2020	Dec 2020	Mar 2021	Sep 2023
Acceptance	51%	58%	54%	64%	66%	70%	74%	72%	72%
Approve	41%	36%	35%	43%	43%	49%	52%	49%	52%
Disapprove	44%	38%	42%	34%	31%	28%	23%	24%	23%
Ambivalent	10%	22%	19%	21%	23%	21%	22%	23%	20%

Q6: Overall, how much do you approve or disapprove of the following: The federal government legalizing the sale and use of recreational cannabis/marijuana in Canada, overall? [Base: All respondents N=2006]
 [Note: In March and December 2017, question was asked in terms of support/opposition rather than approval/disapproval]. **NOTE: Acceptance = Approval + Ambivalent, as Ambivalents effectively provide tacit approval, largely display more positive orientations towards cannabis, and tend to express approval when forced to choose in other research.**

At least seven-in-ten in every province/region are accepting of cannabis legalization, with Atlantic Canadians most likely to approve

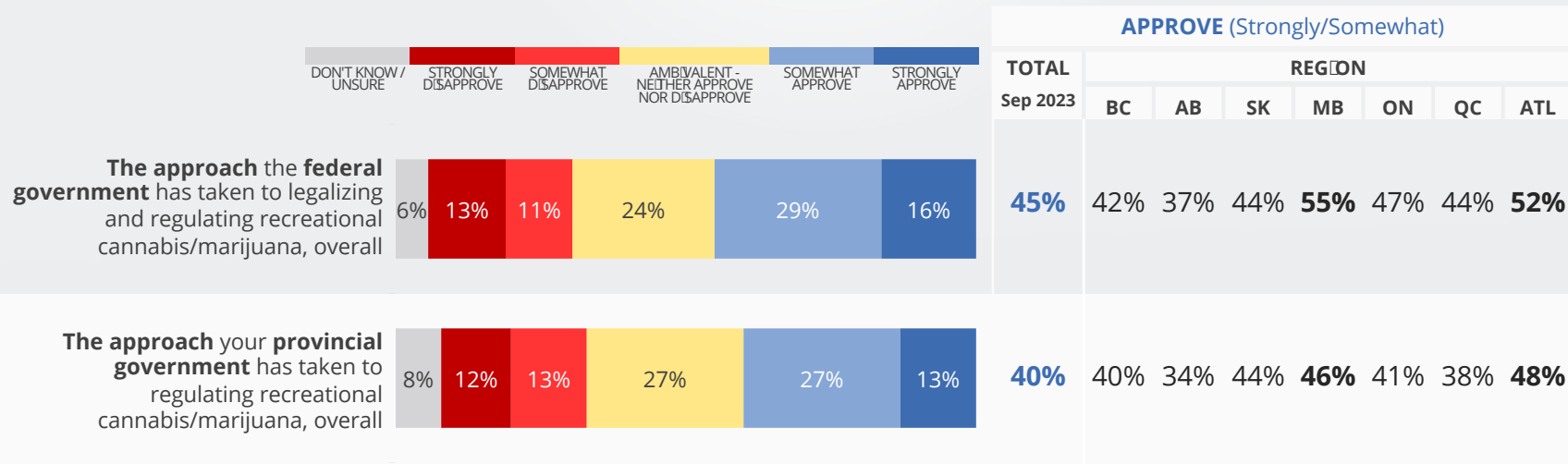
- Approval levels increase slightly across all provinces compared to March 2021, except for Alberta where approval declines slightly; however, acceptance is high and on par with the other provinces.



Q6: Overall, how much do you approve or disapprove of the following: The federal government legalizing the sale and use of recreational cannabis/marijuana in Canada, overall?
 [Base: All respondents, N=2006] [Note: In March and December 2017, question was asked in terms of support/opposition rather than approval/disapproval.] NOTE: Acceptance = Approval + Ambivalent, as Ambivalents effectively provide tacit approval, largely display more positive orientations towards cannabis, and tend to express approval when forced to choose in other research.

Almost seven-in-ten Canadians express approval (40-45%) or ambivalence (24-27%) to the approach federal and provincial governments have taken to cannabis legalization and regulation, overall

- Atlantic Canadians and Manitobans give higher approval ratings to the federal government, while Albertans are least likely to approve of the approach taken.
- Across provinces between one-third to over two-fifths approve of the approach taken by their provincial government to regulate recreational cannabis – here as well, Atlantic Canadians and Manitobans are most likely to approve of the actions taken by their government while Albertans are least likely to approve of the approach taken by their provincial government.





Legalization of cannabis: Perceptions & concerns

Only a quarter feel cannabis legalization has had an overall negative impact on Canada or their province. On economic and tax revenue measures, perceived positive impacts outweigh negatives by 2:1 or greater margin.

- Slightly more feel that cannabis legalization is having a negative impact on Canada's and their province's economy compared to 2021; however, the perceived positive impact on economy is nearly twice the negative impact.
- Notably, far fewer Canadians (21%) feel that legalization has a negative impact on Canada's reputation in the U.S. now than compared to 2020 and earlier. While legalization appears to have a slightly more positive than negative impact on Canada's global reputation (27% vs. 23%)
- Four-in-ten see positive impacts of legalization on both federal (39%) and provincial (40%) tax revenues.

	IMPACT						POSITIVE (Very/Somewhat)								NEGATIVE (Very/Somewhat)						
	DON'T KNOW / UNSURE	VERY POSITIVE IMPACT	SOMEWHAT POSITIVE IMPACT	BASICALLY, NO IMPACT	SOMEWHAT NEGATIVE IMPACT	VERY NEGATIVE IMPACT	Sep 2023	Sep 2023	Mar 2021	Jan 2020	Mar 2019	Jul 2018	Dec 2017	Mar 2017							
Canada, overall	13%	10%	24%	29%	14%	10%	34%	24%	22%	25%	29%	42%	40%	46%							
Your province, overall	14%	8%	22%	31%	14%	12%	30%	26%	23%	27%	30%	-	-	-							
Canada's economy, overall	18%	7%	25%	33%	8%	8%	32%	17%	13%	15%	15%	18%	19%	23%							
Your province's economy, overall	21%	9%	23%	29%	9%	9%	32%	18%	13%	16%	15%	-	-	-							
Canada's reputation globally (not including U.S.)	19%	8%	19%	32%	12%	10%	27%	23%	22%	25%	31%	-	-	-							
Canada's reputation in the U.S.	26%	5%	16%	30%	14%	8%	21%	23%	21%	40%	43%	-	-	-							
Federal government tax revenues	28%	11%	28%	21%	6%	6%	39%	12%	10%	14%	11%	-	-	-							
Your provincial government's tax revenues	26%	9%	31%	22%	6%	6%	40%	12%	10%	13%	11%	-	-	-							



Q7. And, to the best of your knowledge... overall, how much of a positive or negative impact, if any, has the legalization of recreational cannabis/marijuana had on each of the following in Canada so far: (Base: N=varies). Note: 2017 and 2018 polling asked respondents what type of impact they expected to see from legalization.

However, when considering health impacts, the public has a more negative than positive view – especially when considering youth and children

- Negative impact of legalization is seen to be more pronounced when it comes to health of youth and children under 18 (32%-38%).
- Among past 12-month users, four-in-ten say there has been a positive impact on overall health (42%) as well as mental (49%) and physical (39%) health of adults.

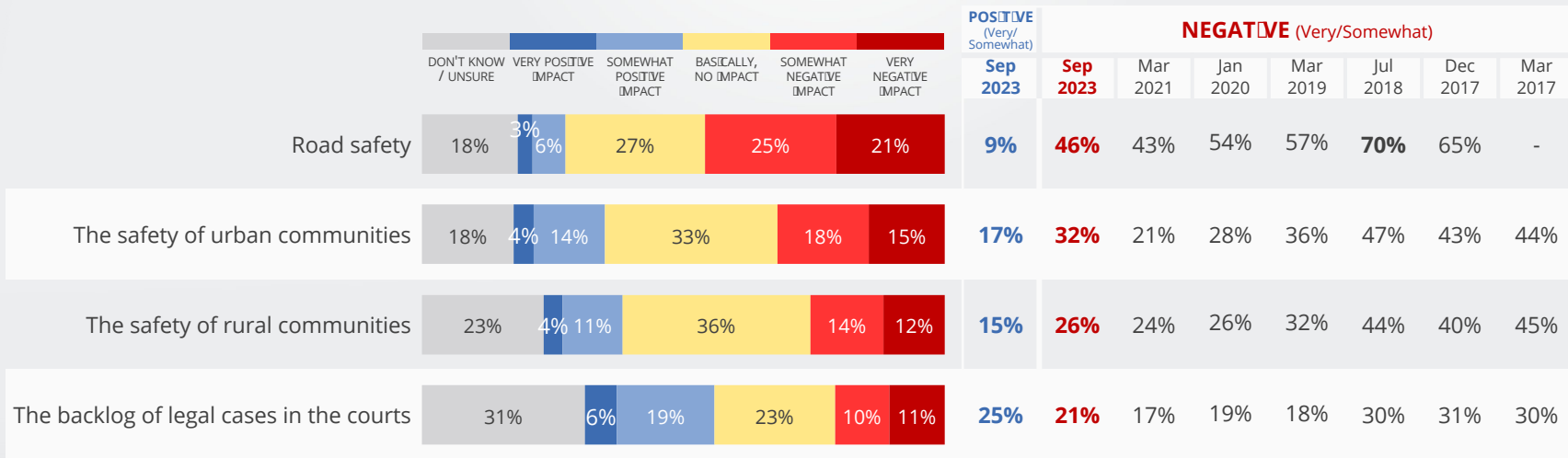
	IMPACT						POSITIVE (Very/Somewhat)								NEGATIVE (Very/Somewhat)							
	DON'T KNOW / UNSURE	VERY POSITIVE IMPACT	SOMEWHAT POSITIVE IMPACT	BASICALLY, NO IMPACT	SOMEWHAT NEGATIVE IMPACT	VERY NEGATIVE IMPACT	Sep 2023	Sep 2023	Mar 2021	Jan 2020	Mar 2019	Jul 2018	Dec 2017	Mar 2017	Sep 2023	Mar 2021	Jan 2020	Mar 2019	Jul 2018	Dec 2017	Mar 2017	
The overall health of adult Canadians	17%	6%	16%	30%	18%	13%	22%	31%	26%	30%	35%	47%	41%	50%								
The physical health of adults, overall	17%	6%	16%	30%	19%	12%	22%	31%	25%	30%	35%	50%	46%	-								
The mental health of adults, overall	18%	6%	20%	26%	16%	14%	26%	30%	30%	32%	33%	48%	44%	-								
The overall health of Canadian youth aged 18-25	22%	4%	11%	25%	22%	16%	15%	38%	36%	44%	47%	62%	57%	61%								
Physical health youth aged 18-25, overall	22%	5%	10%	30%	19%	13%	15%	32%	33%	41%	43%	-	-	-								
Mental health of youth aged 18-25, overall	20%	5%	12%	25%	20%	17%	17%	38%	41%	45%	48%	-	-	-								
The overall health of Canadian children (under 18)	23%	3%	9%	29%	18%	18%	12%	36%	-	-	-	-	-	-								
Physical health of children (under 18), overall	26%	2%	7%	28%	16%	20%	10%	37%	-	-	-	-	-	-								
Mental health of children (under 18), overall	24%	2%	6%	29%	20%	18%	8%	38%	-	-	-	-	-	-								



Q7. And, to the best of your knowledge... overall, how much of a positive or negative impact, if any, has the legalization of recreational cannabis/marijuana had on each of the following in Canada so far: (Base: N=varies)

Close to half believe road safety has been negatively impacted by legalization of cannabis – these concerns have remained at the same level since 2021, though much lower compared to 2019-2020 and pre-legalization

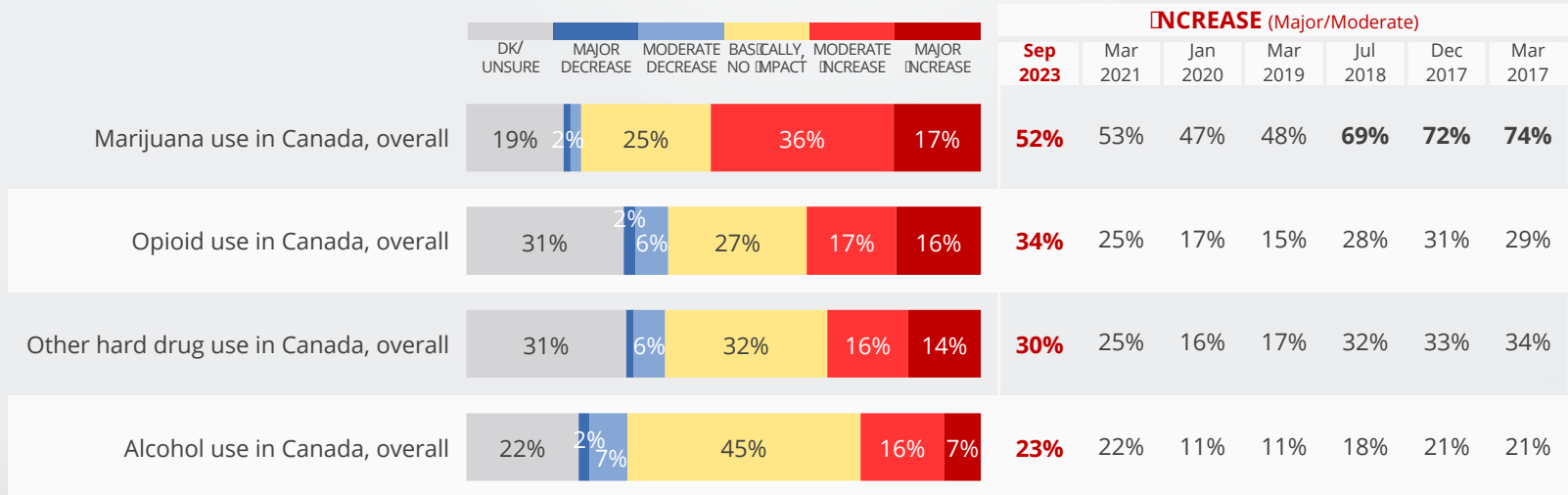
- One-in-four continue feel negatively about safety of rural communities, while one-third feel there is a negative impact on urban communities – much more negative than perceived impact in 2021. However, concerns are much lower compared to pre-legalization.



Q7. And, to the best of your knowledge... overall, how much of a positive or negative impact, if any, has the legalization of recreational cannabis/marijuana had on each of the following in Canada so far: (Base: N=varies)

Half (52%) of Canadians feel there has been an increase in cannabis usage since legalization – however, this is far lower than the proportion expecting an increase prior to legalization (69%)

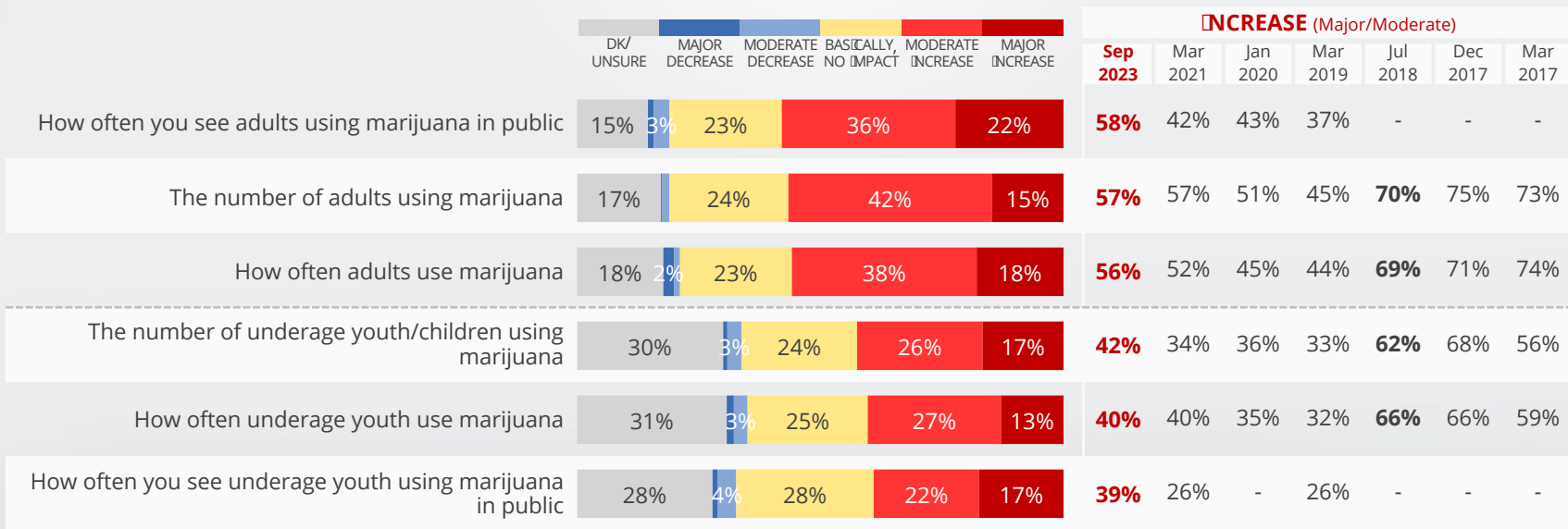
- While one-third feel legalization has resulted in an increase in the usage of other hard drugs (30%), a similar proportion feels it has remained the same (32%). A plurality feel legalization has had no impact on alcohol usage (45%). The proportion that expected an increase in alcohol and other drug consumption prior to legalization (Jul 2018 and earlier) is about the same as the proportion perceiving an increase now.
- The proportion of Canadians that feel legalization has increased the usage of opioids is somewhat higher now than prior to legalization.



Q8. And, to the best of your knowledge... overall, how much of an increase or decrease has the legalization of recreational cannabis/marijuana caused to each of the following in Canada, if at all: (Base: N=varies)

Many feel legalization has caused an increase in adult and underage cannabis users and usage frequency – but notably fewer feel this way compared to the proportions expecting such impacts prior to legalization

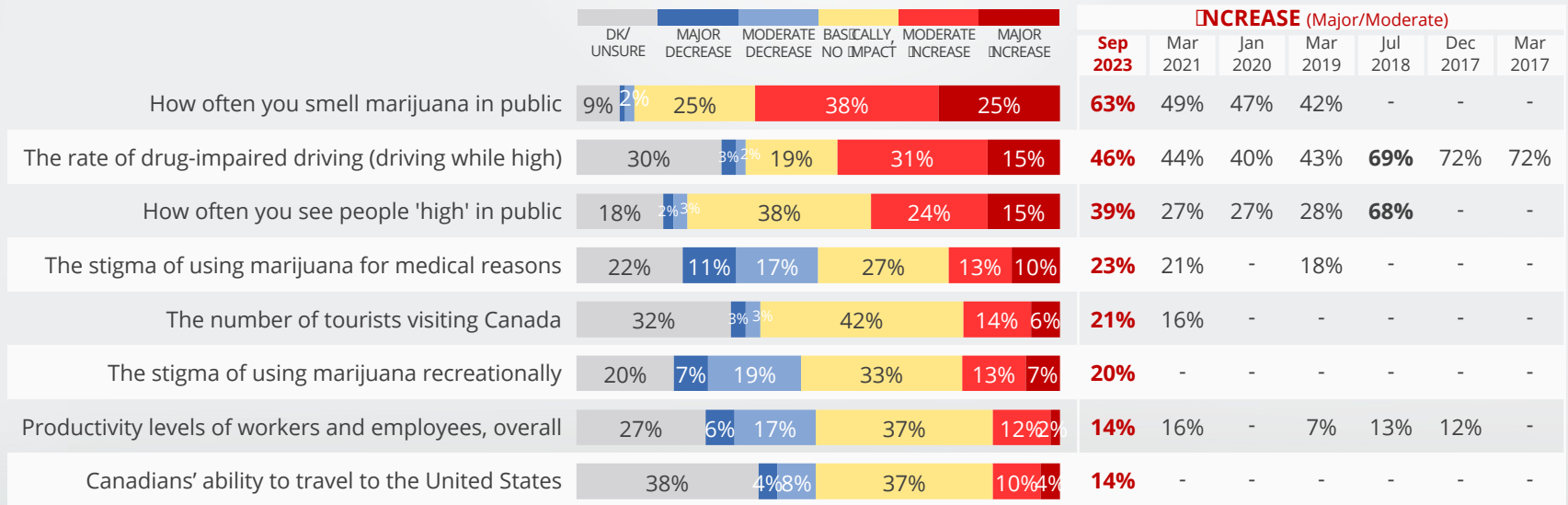
- Prior to legalization, about two-thirds believed the number of youth using marijuana and the frequency of youth usage would increase due to legalization, whereas two-fifths (39-42%) believe this to be the case now.
- Notably, perceived number of youth using marijuana, and the frequency of seeing youth use cannabis in public is higher in 2023, compared to previous years (2019-2021). Likewise, frequency of seeing adults use cannabis in public or how often adults use cannabis has increased in 2023 compared to 2019-2021.



Q8. And, to the best of your knowledge... overall, how much of an increase or decrease has the legalization of recreational cannabis/marijuana caused to each of the following in Canada, if at all: (Base: N=varies)

Two-thirds agree that they smell cannabis more often in public now, and two-fifths say that they are seeing people 'high' in public more often, since legalization – a notable 12 to 14 point increase in levels compared to 2021

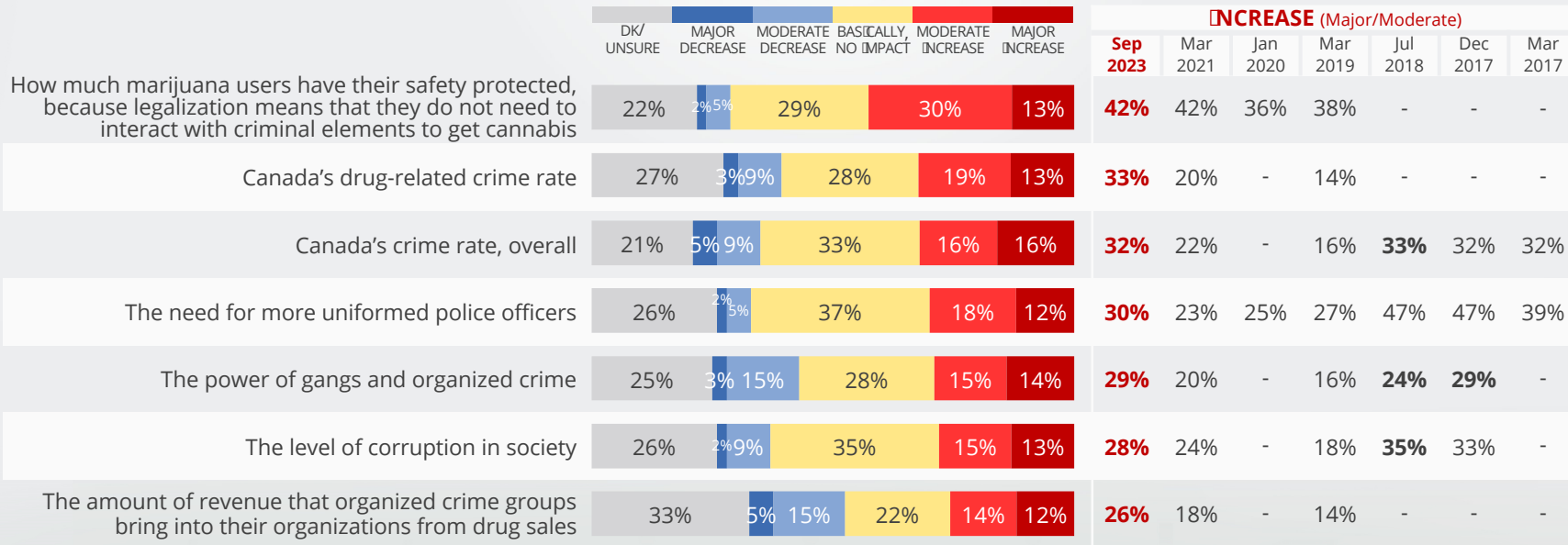
- The 39% that report seeing more people 'high' in public is still much lower than the 68% who expected such an increase prior to legalization.
- Similarly, 69% expected an increase in drug-impaired driving prior to legalization, but this has fallen to 46% now – in line with the proportion that feels road safety is being negatively impacted due to cannabis legalization.
- Over a quarter of Canadians believe that the stigma of using cannabis for medical reasons (28%) or recreationally (27%) has decreased due to legalization.



Q8. And, to the best of your knowledge... overall, how much of an increase or decrease has the legalization of recreational cannabis/marijuana caused to each of the following in Canada, if at all: (Base: N=varies)

About three-in-ten Canadians feel legalization has resulted in increased crime (roughly matching expectations), but about one-in-ten feel it has decreased crime

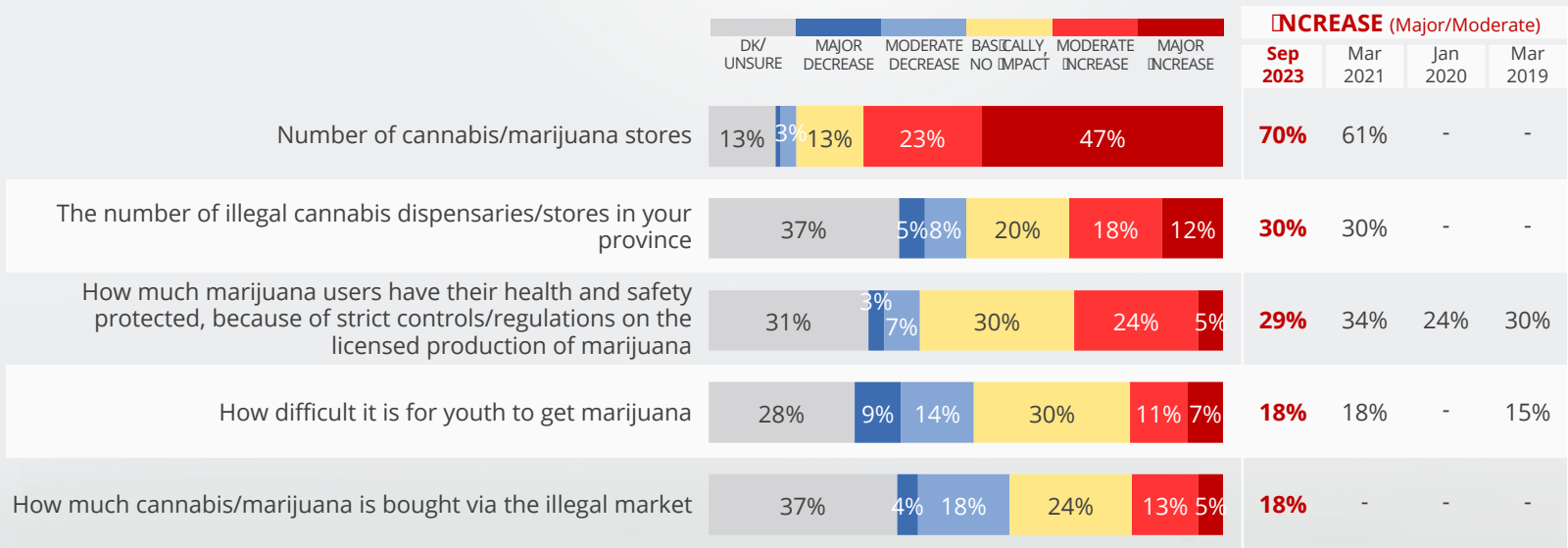
- Despite the goals of legalization, there is no public consensus about whether organized crime has increased (26%) or decreased (19%) drug revenues since October 2018. Notably, 22% feel there has been no impact in this arena, and a third (33%) are unsure of the impact.
- However, four-in-ten (42%; just 7% feel the opposite) Canadians continue to feel that cannabis users are safer now because they don't have to interact with criminal elements to get cannabis.



Q8. And, to the best of your knowledge... overall, how much of an increase or decrease has the legalization of recreational cannabis/marijuana caused to each of the following in Canada, if at all: (Base: N=varies)

Seven-in-ten feel the number of cannabis stores have increased since legalization, but about three-in-ten also believe the same about illegal stores

- One-third (30%) feel the number of illegal stores in their province has increased – Quebec (34%), Ontario (33%) are more likely to agree while Albertans are less likely to feel there is an increase in illegal stores in their province (17%).
- While 18% feel it has become more difficult for youth to get marijuana, a slightly higher proportion feel it is has become easier (23%).
- 29% believe that users have benefited from increased health protections due to legalization, while 30% believes this has remained the same.



Q8. And, to the best of your knowledge... overall, how much of an increase or decrease has the legalization of recreational cannabis/marijuana caused to each of the following in Canada, if at all: (Base: N=varies)

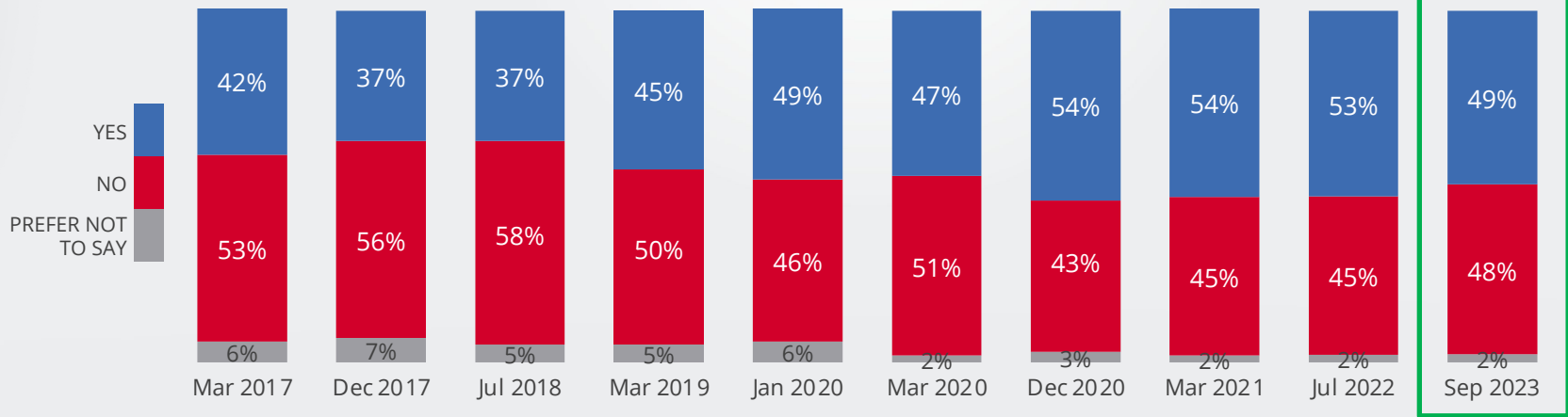


Cannabis usage: Prevalence & purchase patterns

5 years after cannabis legalization, half (49%) of Canadians now say they've used cannabis at least once in their lifetime

- Slightly lower proportions claim to have used Cannabis in their lifetime compared to the previous 3 years (49% in 2023 vs. 53-54% in Dec 2020 to Jul 2022).

Ever Used Cannabis in Lifetime



Note: Most of the questions in this section about usage were asked only of the cohort who have used cannabis in some form in the past 12 months. Unless otherwise specified (i.e. this slide) all references to “users” in this entire report refer to those who have used marijuana in the past 12 months.

All questions about cannabis included the following description on the bottom of each question page:
 Note: Cannabis is also known as marijuana, weed, pot, grass, mary jane, etc. This survey refers to cannabis/marijuana in all of its different forms and extracts, such as joints, edibles, hashish, hash, hash oil, shatter, and wax – regardless of the method of consumption. This survey does not refer to synthetic marijuana, also known as spice, K2, K3, etc.

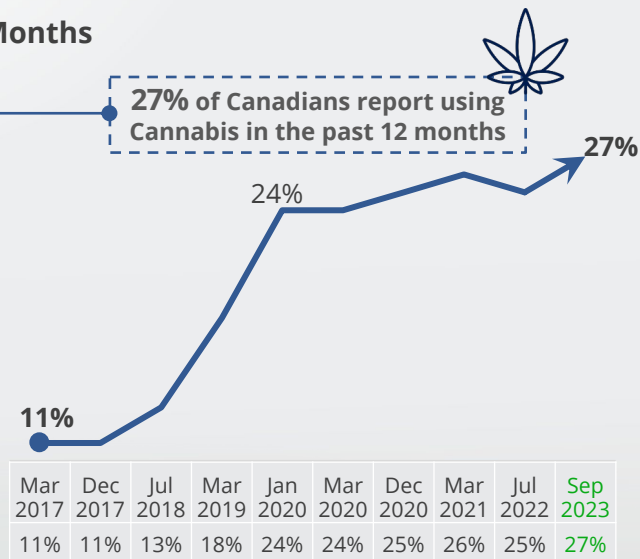
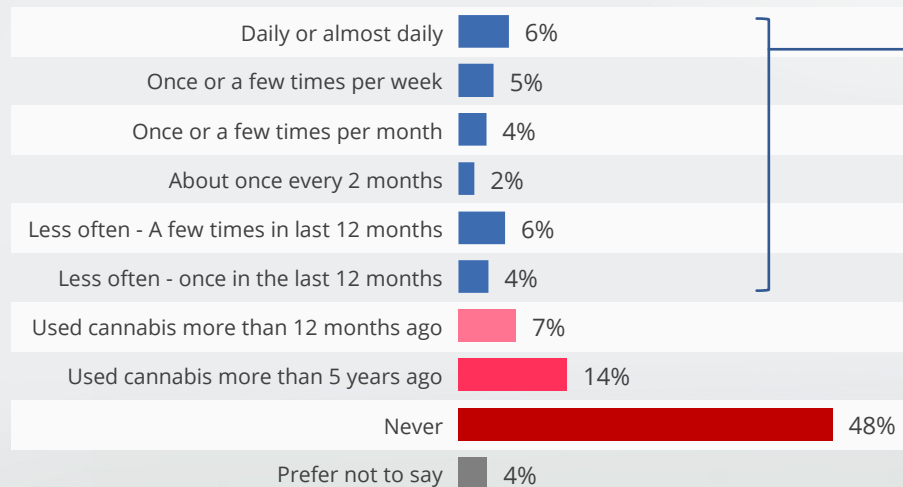


Q1A: have you ever used cannabis (also known as marijuana) in your lifetime in any form – whether smoked, vaped, dabbed, or consumed in edible or drinkable form – even if it was just one time?
 [Base: Total N=2006]

Over a quarter (27%) of Canadians report using cannabis in the past 12 months – up just 2 points since July 2022, and up 9 points since March 2019 (5 months post-legalization), and double (+14) the levels seen immediately pre-legalization

- One-fifth (21%) say they last used cannabis more than a year ago (7%) or say they used it before legalization in October 2018 (14%).
- Millennials (36%) and Gen Z (31%) are most likely to have used cannabis in the past 12 months, followed by Gen X (27%) and Boomers (18%). Usage is the same among men and women (27% vs. 26%). Among decided voters, NDP (37%) and Green (35%) supporters are most likely to have used cannabis in the past 12 months, followed by Conservative (29%) and Liberal (24%) supporters – with BQ voters trailing (14%).
- 12-month usage frequency is highest among Atlantic Canadians (35%), followed by Ontarians (30%) and Manitobans (30%). Quebecers report the lowest 12-month usage (19%).

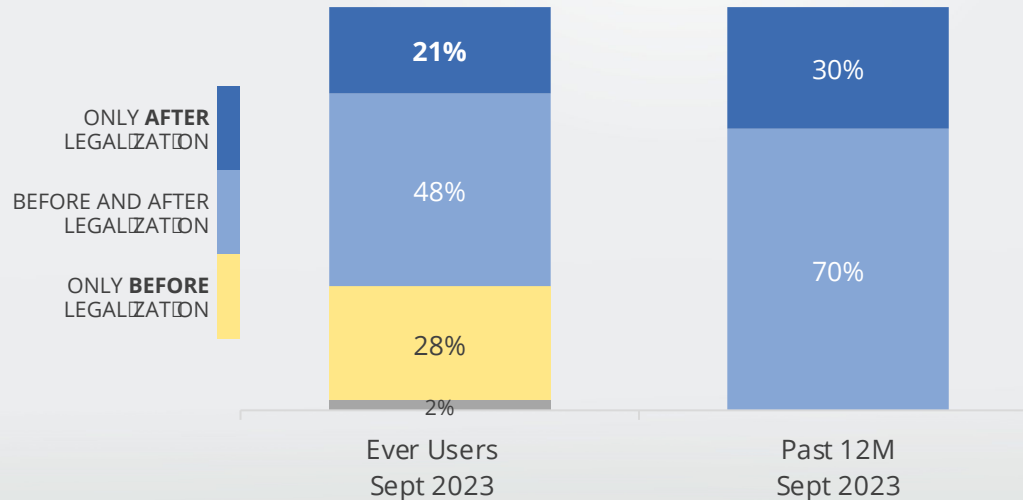
Cannabis Usage in the Past 12 Months



Q1A. Have you ever used marijuana in some form - whether smoked, vaped, dabbed, or consumed in edible form? This includes both medical and recreational use.
 Q2. In the last 12 months, about how often have you used marijuana in some form - whether smoked, vaped, dabbed, or consumed in edible form?
 [Base: Total N=2006]

One-in-ten (11%) adult Canadians – and two-in-ten (21%) Canadians who have ever used cannabis – report using cannabis for the first time only after legalization

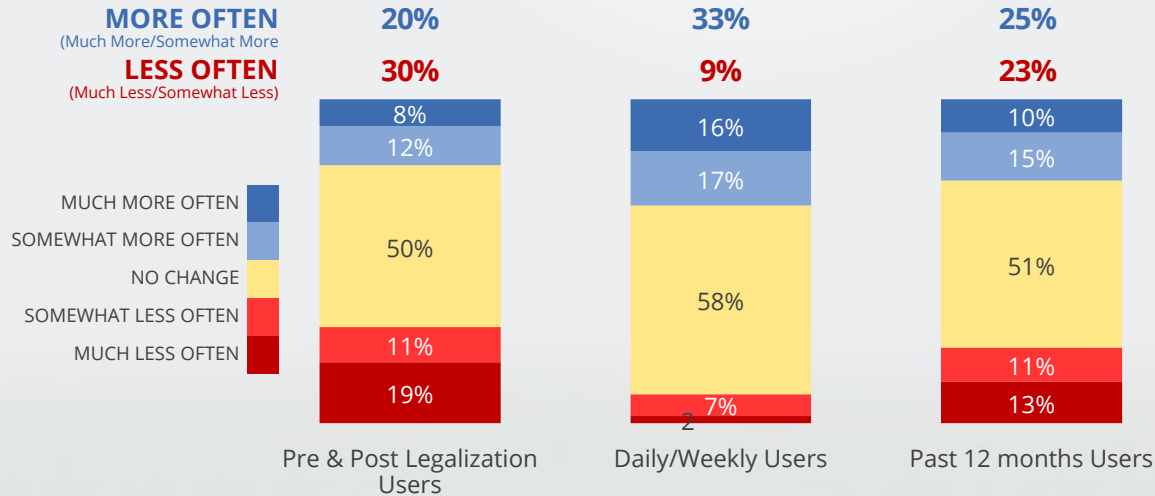
- One-in-three (30%) past 12-month users, say have tried cannabis only after it was legalized.
- Those who have only used cannabis post-legalization are much more likely to be younger Gen Zs (54%), while one-in-ten among Millennials (19%), Gen Xers (20%) and Boomers (15%) have tried it post-legalization.



Those who have used cannabis before and after legalization are more likely to have reduced (30%) than increased (20%) their frequency of use now

- While there are new users entering the market, there are also some that are reducing their usage frequency – which explains why usage frequency hasn’t continued to increased drastically since legalization.
- Daily/weekly users, however, are much more likely to have increased their usage frequency since legalization (33% vs. 9%), while past 12-month users have balanced usage frequency, where increase and decrease in usage is the same (25% vs. 23%).
- Gen Z (42% vs. 20%), Millennials (29% vs. 20%) and Boomers (37% vs. 16%) are more likely to have reduced usage frequency since legalization compared to before legalization, whereas Gen Xers are likely to use cannabis more often now than before (25% vs. 19%).

Frequency of Cannabis Usage Now, Compared to Before Legalization

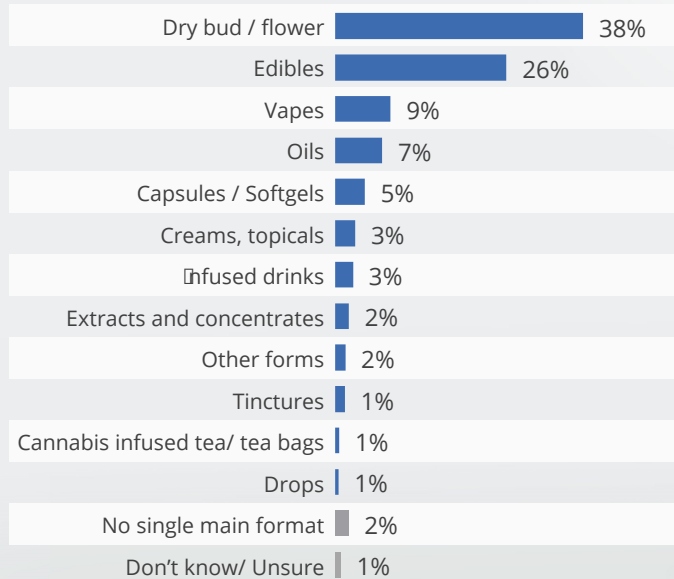


Q1C: And, thinking about how often you used cannabis/marijuana (in any form) before legalization... would you say you now use cannabis...
 [Base: Used Cannabis before and after legalization N=503]

Dry bud remains the most frequently used format amongst past 12-month users, followed by edibles. However, when considering all formats used – regardless of frequency – edibles are now slightly ahead of dry bud.

- Notably, dry bud is the main format among more frequent users.

MAIN Form of Cannabis Used by Past 12 Months



ALL Forms of Cannabis Used by Past 12 Months

	Sep 2023	Mar 2021	Dec 2020	Mar 2020	Jan 2020	Mar 2019	Dec 2017	Mar 2017
Edibles	56%	57%	52%	50%	47%	48%	32%	36%
Dry bud / flower	50%	62%	66%	67%	66%	74%	80%	86%
Vapes	24%	-	-	-	-	-	-	-
Oils (i.e., Cannabis oil, Hash oil)	23%	26%	32%	36%	35%	31%	25%	16%
Infused drinks (i.e., infusibles, drinkables, "shots")	15%	12%	15%	5%	7%	3%	4%	1%
Capsules / Softgels	14%	18%	18%	12%	13%	10%	-	-
Creams, topicals	12%	11%	11%	10%	13%	5%	-	-
Extracts and concentrates (i.e., shatter, dab, wax, resin, hash, etc.)	11%	13%	10%	11%	11%	10%	9%	9%
Drops	6%	-	-	-	-	-	-	-
Tinctures	5%	6%	11%	8%	8%	4%	3%	3%
Cannabis infused tea (for drinking)	5%	-	-	-	-	-	-	-
Dissolvable powder (for drinking)	3%	-	-	-	-	-	-	-



Q3A: Thinking about the past 12 months, what was the main form of cannabis/marijuana that you used?

Q3B: Thinking about the past 12 months, what other forms of cannabis/marijuana have you used? (what other forms of cannabis/marijuana have you used?)

[Base: Past 12 Month Users N=561]

Eight-in-ten past 12-month users report buying legal, with two-thirds claiming that they buy legal only. Notably, reported legal purchases continue to consistently increase over time.


- Based on user reporting, purchasing via only legal sources continues to increase – from 59% in March 2021 to 65%. Illegal only purchase sees a drop too, from 7% to 4%.
- Daily/weekly users report primarily purchasing through only legal sources (63%), but they are also more likely to purchase from illegal sources (22%) than less frequent users, with 5% purchasing illegally only. 11% grow their own cannabis legally.
- Reported illegal purchases are more common in Atlantic Canada (16%), BC (13%) and Ontario (12%) users, and least common in Quebec (5%) and Alberta (6%).

Past 12 Month Users: Legal vs. Illegal Sources

BOUGHT FROM LEGAL SOURCES		Sept 2023	Mar 2021	Dec 2020
In-person at a store	72%	82%	67%	66%
Online and delivered	25%			
BOUGHT FROM ILLEGAL SOURCES				
In-person from a person	8%			
In-person from an illegal dispensary/store	4%	13%	18%	20%
Online and delivered	4%			
OTHER				
It was given to me	21%		20%	21%
I have grown it legally	6%		4%	2%
I have grown it illegally	1%		1%	1%
Prefer not to say	1%		3%	2%



Legal Only
Sept 23: 65%
 Mar 21: 59%
 Dec 20: 55%



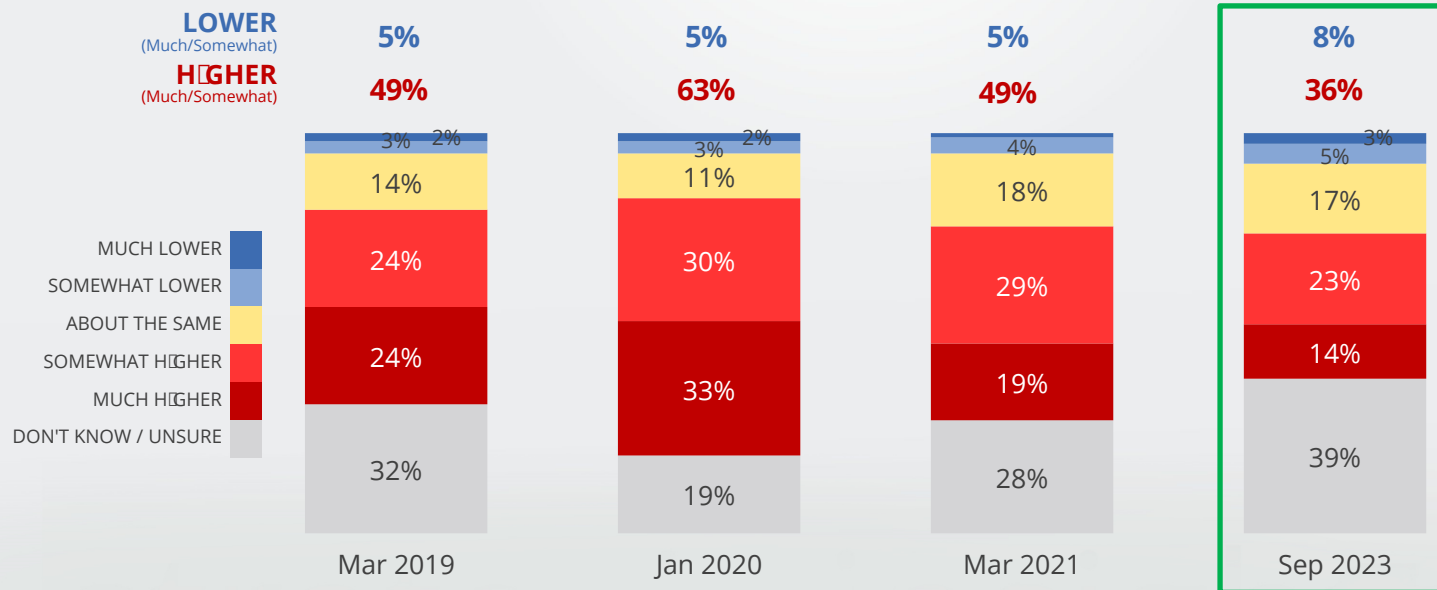
Illegal Only
Sept 23: 4%
 Mar 21: 7%
 Dec 20: 8%



Past 12-month users still tend to view legal prices as higher (36%) or the same (17%) as illegal prices, but perceptions of higher prices remain significantly lower than 2019-2021 and four-in-ten are currently unsure

- Daily/weekly users – who are more likely to buy illegal – are more likely to feel legal prices are higher (43% vs. 12% lower).
- Those purchasing through legal sources (34%) are less likely than those purchasing via illegal sources (60%) to feel that the legal prices are higher than illegal prices.

Perceptions of Legal Prices vs. Illegal Market among Past 12 Month Users



Q5: Generally speaking, thinking about comparable products and THC/CBD levels, would you say that legal prices for recreational cannabis/marijuana are..
[Base: Past 12 Month Users N=561]

Legal cannabis in Canada: 5 years later

Contact us if you have questions about this study,
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