

A wide-angle photograph of the Calgary skyline at dusk, with numerous skyscrapers illuminated by city lights against a deep blue sky.

# City of Calgary – Cannabis Research Combined Study Findings

Final report (February 8, 2018)

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The logo for ENVIRONICS RESEARCH, with "ENVIRONICS" in a large, bold, white sans-serif font and "RESEARCH" in a smaller, all-caps, white sans-serif font below it, both on a dark purple rectangular background.

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# Executive summary

The following are the key findings from quantitative and qualitative research conducted with Calgary residents, as well as those seeking to become involved in producing and/or selling cannabis in Calgary once this becomes a legal substance in July 2018:

## Cannabis Usage Among Calgarians

- Calgarians' current/intended consumption of cannabis mirrors that of Canadians: seven percent use cannabis once per week and nine percent use this substance less frequently. One-in-ten Calgarians (11%) who do not currently use cannabis indicate that they are willing to try it once it becomes legal.
- Nearly one-half of Calgary residents (47%) indicate that they have tried cannabis at some point, with one-in-ten cannabis users (9%, or 4% of all Calgary residents) indicating that they currently have a medical prescription.
- Calgary residents who currently or who plan to use cannabis (26% of all Calgarians) are most likely to consume it in edible forms (71% very or somewhat likely), or to smoke marijuana (70%), once it becomes legal. Slightly more than six-in-ten (61%) expect to use oils, balms or tinctures that contain cannabis, with slightly fewer than one-half (47%) expecting to vape cannabis.

## Cannabis Legalization – Views and Expectations

- Slightly more than one-half of Calgary residents are in favour of legalizing cannabis (55%), with four-in-ten opposed to this measure (41%). Cannabis users, non-using legalization supporters and legalization opponents had very different expectations of what it will be like once cannabis becomes legal next year:
  - Cannabis users hoped they will be able to consume cannabis more openly, yet were deeply concerned that restrictions on public cannabis use will be enforced more strictly.
  - Cannabis opponents (and to a lesser extent non-using supporters) were concerned that there will be more people driving under the influence of cannabis and smoking cannabis in public places.
  - Non-using supporters of legalization generally looked upon this change favourably, but did not expect it will have a significant impact on them personally.

# Executive summary

## Public Consumption

- A majority of Calgarians (55%) believe the rules around public cannabis consumption should mirror those related to alcohol consumption, with three-in-ten (32%) believing these laws should be more like those around smoking tobacco or vaping in public.
- Most Calgarians are permissive towards using cannabis on private property, but are less likely to find it acceptable for people to consume cannabis in public places like sidewalks, parks, patios and public transit stops. Fewer than one-half of Calgary residents (45%) feel that it is acceptable for people to consume cannabis at a festival or public event, with residents most likely to support restricting cannabis use to designated areas. Frequent cannabis users are more likely than others to feel that it is acceptable to use these products in public areas.
  - In the focus groups, opponents and supporters of legalization who do not use cannabis tended to agree that there should be clear limits on where people can consume cannabis in public. Current cannabis users, meanwhile, were more likely to feel that they should have a great deal of freedom to consume cannabis in public as long as they are not bothering others.
- There was also a consensus among focus group participants that every effort should be made to prohibit cannabis smoking and vaping in public places where children are present, as well as in places where non-users may be exposed to second-hand smoke. Most also agreed that it will be much more difficult to enforce public consumption rules for edible cannabis products.
- Calgarians are split between those who want cannabis consumption laws to be strictly enforced (44%) and those who desire flexibility (54%). Opponents of legalization were more likely to want these rules to be strictly enforced, with supporters and those who use cannabis regularly more likely to be in favour of police and bylaw officers having some degree of discretion when enforcing these rules.

# Executive summary

## Siting, Zoning and Business Operations

- Eight-in-ten Calgarians support measures that would keep cannabis retailers a minimum distance from elementary, junior and high schools (81%), with three-quarters (76%) wanting retailers a set distance from organizations that work with vulnerable populations. Six-in-ten (61%) want cannabis retailers to be located a minimum distance from one another, with slightly less than one-half (47%) supporting minimum distance restrictions from liquor stores.
  - There was a strong consensus among proponents of retail operations who were interviewed, as well as among many focus group participants, that cannabis retailers need to be located far from schools. Potential retailers (as well as users and non-users, including opponents) indicated they would be fine with cannabis and liquor retailers being located close to one another, provided they are not co-located or share a common wall.
- Slightly more than three-quarters of Calgarians (78%) support restricting commercial cannabis production to industrial areas of the city, with slightly more than one-half of residents (53%) indicating that retailers should be allowed to sell cannabis in any commercial area of the city.
  - Many focus group participants, as well as proponents of cannabis businesses who were interviewed, agreed that cannabis production should be restricted to industrial and agricultural areas of Calgary.
- Almost six-in-ten Calgarians (59%) want cannabis retailers to have the same provincially-mandated operating hours as liquor stores (10 am to 2 am), with three-in-ten (31%) wanting more restrictive hours and a very small number (6%) wanting cannabis to be sold for a longer period of time. Most potential retailers who were interviewed also advocated for the same operating hours to be used, although most said that they do not expect to be open late at night.

# Executive summary

## Home Growing

- Among those who currently use or would consider using cannabis (26% of all Calgarians), three-in-ten (31%) say they are likely to try growing their own plants for personal use, with frequent users more likely to consider growing plants at home. Those inclined to grow plants are most likely to keep plants indoors.
- When it comes to growing cannabis at residential households, residents are most likely to be concerned with people breaking into homes and garages to steal plants. Although some regular users acknowledged these impacts, some felt concerns about break-ins may be overstated.
- There was a great deal of support expressed in the focus groups for a complaint-based system to resolve issues between neighbours who feel negatively impacted by their neighbours growing plants.

## Enforcement, Taxation and Regulation

- Most residents back the idea of The City of Calgary having access to excise revenue on retail cannabis sales. Almost eight-in-ten (79%) want the Alberta government to share a portion of federal taxes it receives from cannabis sales with municipalities, with two-thirds (67%) in favour of The City of Calgary gaining the power to levy its own tax on cannabis to fund enforcement and regulation.
  - There was more support expressed in the focus groups for the idea of the provincial government sharing cannabis revenues with The City, with much firmer opposition to The City having its own cannabis tax because it was felt higher prices for legal cannabis will encourage black market use.
- Potential retailers were split in their views of how The City should evaluate retail applications. Some wanted The City to put in place stringent criteria to ensure that those with a criminal background do not gain a foothold in the legal cannabis business, with others arguing that The City should implement a first-come, first-served system for issuing licenses. Many retailers also felt The City should not duplicate the process used by the Alberta Gaming and Liquor Commission (AGLC) to vet applicants.
- Overall, those involved in production and retail urged The City to regulate those involved in the cannabis business like any comparable enterprise, such as food or beverage production facilities (for cannabis producers) and liquor stores (for cannabis retailers).



# Executive summary

## Public Input and Education

- Most potential producers and retailers have not engaged in extensive public consultation to date, but many expressed their willingness to do so once there is a clear application process in place. Most expected the public hearing process to be similar to those used for liquor store license applications.
- Many of those looking to get involved in the cannabis business had a great deal of praise for The City's efforts to engage the public and stakeholders regarding cannabis legalization, with several commenting that The City's approach to this issue has been very proactive.
- Most potential retailers expected to engage in their own product-related public education, and indicated they would be in favour of providing any additional public education materials produced by The City of Calgary to their customers.
- Most focus group participants said The City needs to play a major role in informing people about what is and is not allowed with respect to public consumption and home growing. Participants mainly advocated for The City to provide the details regarding these rules, or stressed that it should encourage cannabis users to be "considerate" to others when using this drug in public.
  - When asked to identify what is the most effective method of getting these messages out to people, participants were most likely to identify social media, outdoor advertising and mailouts as the most effective tools to use.

# Executive summary

## Segmentation Results

- A segmentation of Calgary's adult population identifies four distinct groups of people, with these groups expressing a range of views related to cannabis legalization, public consumption, home growing and taxation:
  - **Anti-Cannabis Absolutists (17% of Calgarians)**, who are strongly opposed to legalization and most likely to want firm restrictions on cannabis consumption and strongly supports restrictions on where and how cannabis can be grown and sold in Calgary.
  - **Out of Sight, Out of Mind (22% of Calgarians)**, which is a segment that tends to be only tolerant of cannabis consumption on private property, and is also not enthusiastic about having cannabis sold and consumed in their neighbourhoods.
  - **THC Tolerant (48% of Calgarians)**, which constitutes the largest group of Calgary residents. These citizens are somewhat in favour of legalization and are generally open to having cannabis sold near where they live. However, members of this largest segment want restrictions to be placed on how people consume cannabis and generally support rules outlining where cannabis retailers and growers can operate.
  - **Cannabis Champions (13% of Calgarians)**, which includes most current cannabis users and strong advocates of legalization. Members of this smallest segment generally want a minimal number of restrictions imposed on them regarding where they can buy and how they can consume cannabis.
- Details regarding the composition of these segments can be found in the Appendix.



## Methodology

# Methodology

- To better understand the attitudes of Calgarians regarding cannabis legalization, Environics Research was commissioned by The City of Calgary to conduct quantitative and qualitative research on this topic.

## **Phase 1: Quantitative Research (Telephone Survey)**

- Environics conducted a telephone survey with a randomly selected sample of 1,002 Calgarians aged 18 and older between November 6<sup>th</sup> and November 19<sup>th</sup>, 2017.
  - Both landline (70%) and cell phone (30%) sample were used to obtain a random and statistically representative sample of Calgary adults aged 18 years and over.
  - The average interview length was 15 minutes.
- For a general population sample of n=1,002, the statistical margin of error at the 95% confidence level is +/-3.1%.
- The margin of error by quadrant is as follows:
  - Northeast: n=200 (MOE +/- 6.9%)
  - Northwest: n=280 (MOE +/- 5.9%)
  - Southeast: n=240 (MOE +/- 6.3%)
  - Southwest: n=282 (MOE +/- 5.8%)
- Final data were weighted to ensure the overall sample's quadrant, age and gender composition reflects that of the actual Calgary population aged 18 and older, according to the 2016 Canadian Census.
- Where indicated, Calgary results from this survey are compared with the results of an online survey of a representative sample of n=925 Canadian adults aged 18 and over. This survey was conducted by Environics Research from April 20 to May 1, 2017.

# Methodology

## Phase 2: Qualitative Research (Focus Groups, In-Depth Interviews)

- A total of five (5) mixed-gender focus groups were conducted with the following groups of people on the following dates:

Group	Date	Time	Population
1	Tuesday, January 16	5:30 pm	Opponents of legalization
2	Tuesday, January 16	8:00 pm	Legalization supporters/non-users
3	Wednesday, January 17	5:30 pm	Recreational cannabis users aged 18-39
4	Wednesday, January 17	8:00 pm	Recreational cannabis users aged 40-69
5	Thursday, January 18	5:30 pm	Medical cannabis users

- Environics used two methods to recruit participants:
  - Social media:** Environics placed an ad on Facebook which informed Calgary Facebook users about the groups, and asked them to complete a short online “pre-screening” survey that included their contact information. Participants were then recruited from this list.
  - Telephone survey:** Environics requested contact information for those who completed a telephone survey of n=1,002 residents on this topic in October 2017. Those who consented to being recontacted were then asked if they would like to participate in these focus groups.
- Environics recruited a total of 11 participants for each session, with 8-9 participants taking part in each group. All participants were recruited via telephone using a customized screening instrument. Each group lasted approximately 120 to 125 minutes, with all participants paid \$75 in exchange for their contribution.

## Methodology

- In addition to the focus groups, a total of 30 in-depth interviews (IDIs) was conducted by senior Environics consultants from December 19<sup>th</sup>, 2017 to January 26<sup>th</sup>, 2018. This included interviews with:
  - 21 individuals who plan to be involved in retail cannabis sales in Calgary;
  - 2 individuals who plan to be/are exclusively involved in producing cannabis;
  - 2 individuals who are/plan to be involved in both production and retail; and
  - 5 individuals who play another role in the local cannabis industry (e.g. industry representatives, legal/business advisors...).
- Interviews were conducted by telephone and lasted between 30 and 50 minutes. Participants received a \$150 honorarium for their participation.
- Interviews were conducted with individuals who had registered with The City of Calgary as part of its public engagement process on cannabis legalization.
- Environics recruited participants using a custom telephone screening instrument and scheduled appointments based on participants' availability.
- Each interview used the same discussion guide, to ensure a range of views were gathered on the same topics.
- This research is qualitative in nature and cannot be considered representative of all businesses potentially involved in the production and retail of cannabis in Calgary. For this reason, the data for rating scale questions are reported as raw numbers of participants, rather than percentages.



## Cannabis Usage in Calgary

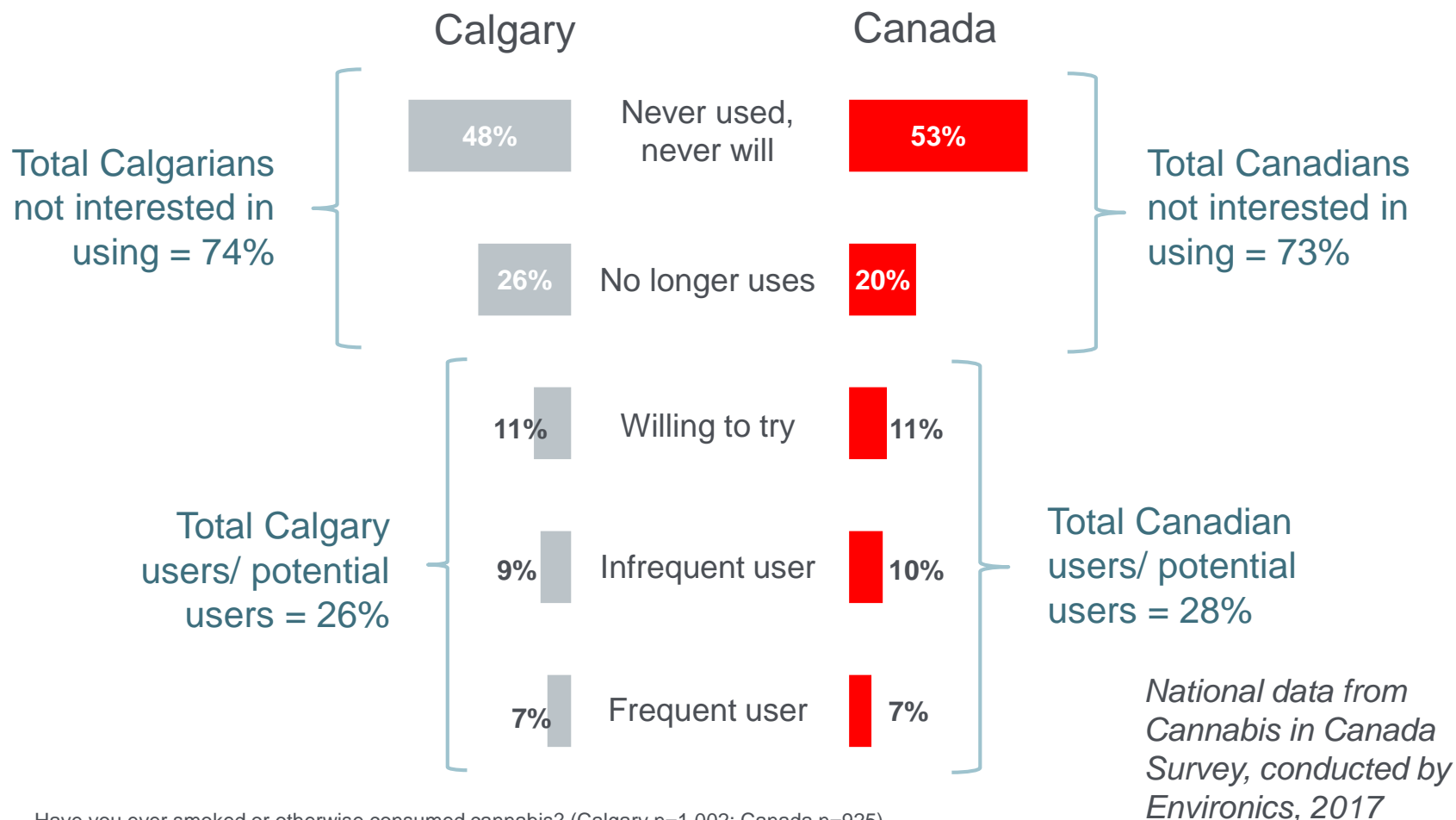
Before this section of the survey, respondents were read the following disclaimer:

“The following questions in the survey are about cannabis use, also known as marijuana. Again, your responses are completely confidential and will not be attributed to you personally in any way.”



# Cannabis consumption – Calgary vs. Canada

Calgarians' consumption of cannabis mirrors that of Canadians in general.

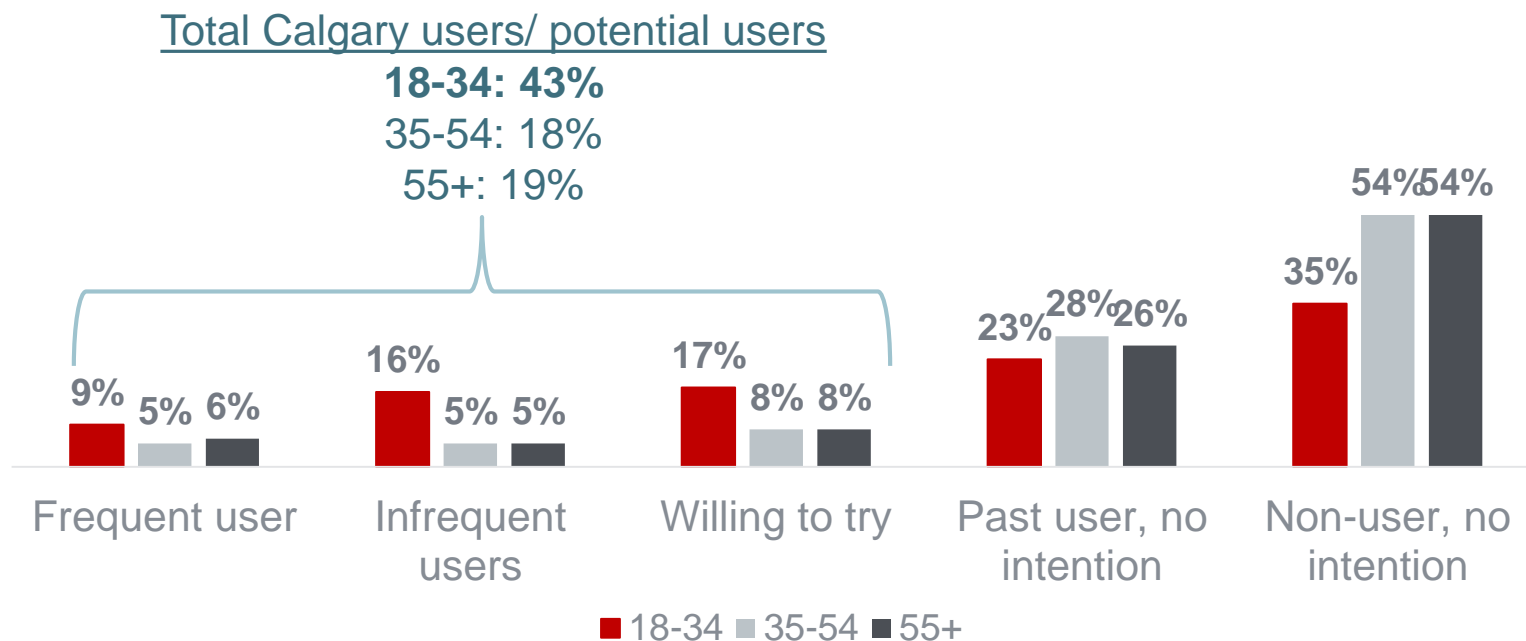


6. Have you ever smoked or otherwise consumed cannabis? (Calgary n=1,002; Canada n=925)
8. Thinking about the past year, how often did you use cannabis? (Base: Cannabis users; Calgary n=441, Canada n=382)
10. How likely are you to [IF Q6=02: try cannabis / IF Q8=05: try cannabis again] once it becomes legal for recreational use? Are you ...  
(Base: Non-users; Calgary n=853, Canada n=248)



## Cannabis Usage in Calgary – By Age

More than four-in-ten young adults currently use cannabis, or are open to using it once it becomes legal.



Other groups that are more likely to currently use cannabis include:

- Renters (32%, including 14% who are frequent users) vs. 12% among homeowners
- Those who have a disability (27%, including 22% who are frequent users)

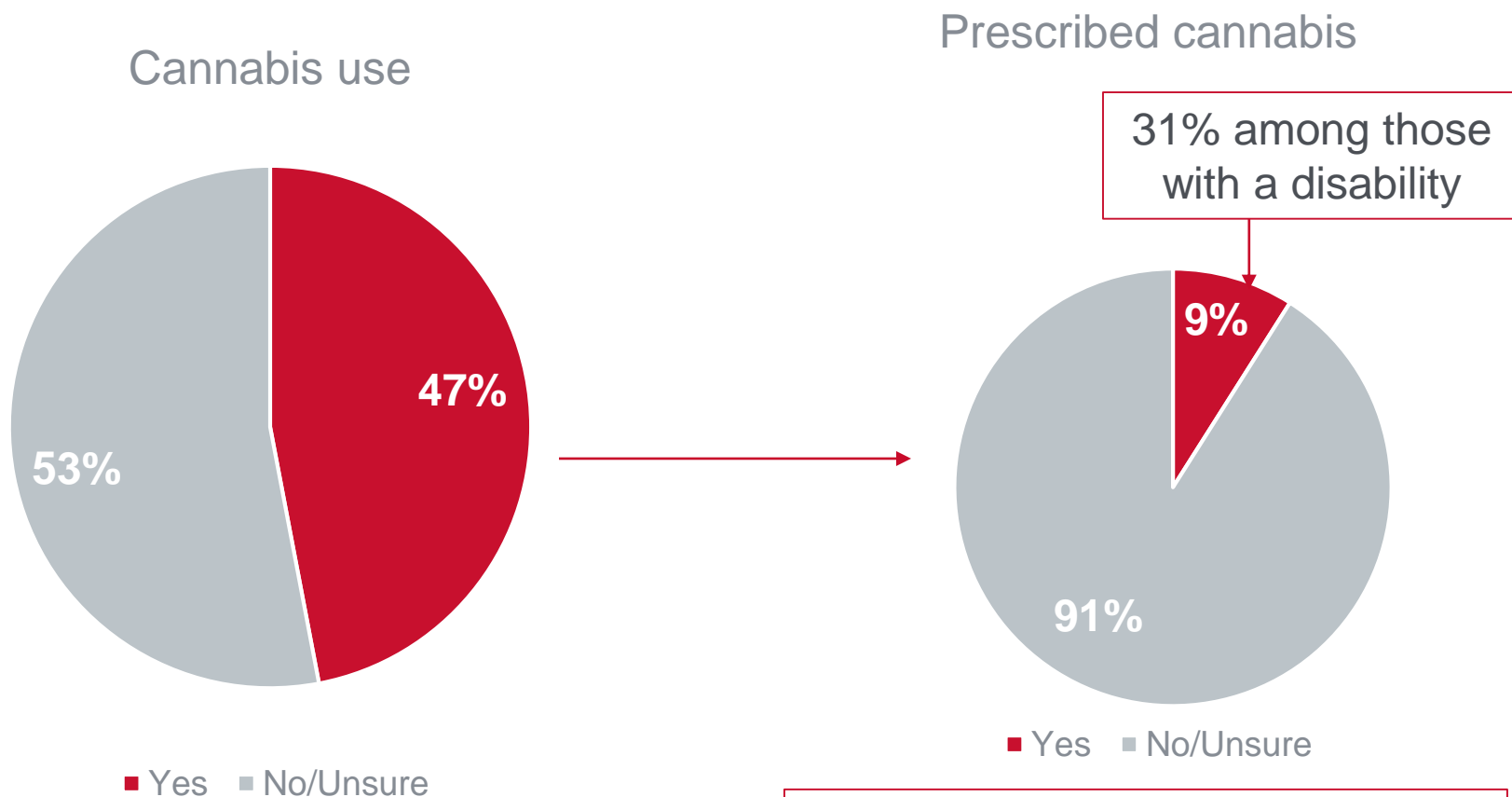
6. Have you ever smoked or otherwise consumed cannabis? (Calgary n=1,002; Canada n=925)

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10. How likely are you to [IF Q6=02: try cannabis / IF Q8=05: try cannabis again] once it becomes legal for recreational use? Are you ...  
(Base: Non-users; Calgary n=853, Canada n=248)

## Cannabis Use in Calgary

One-half of Calgarians have used cannabis, with one-in-ten cannabis users possessing a prescription for this drug.



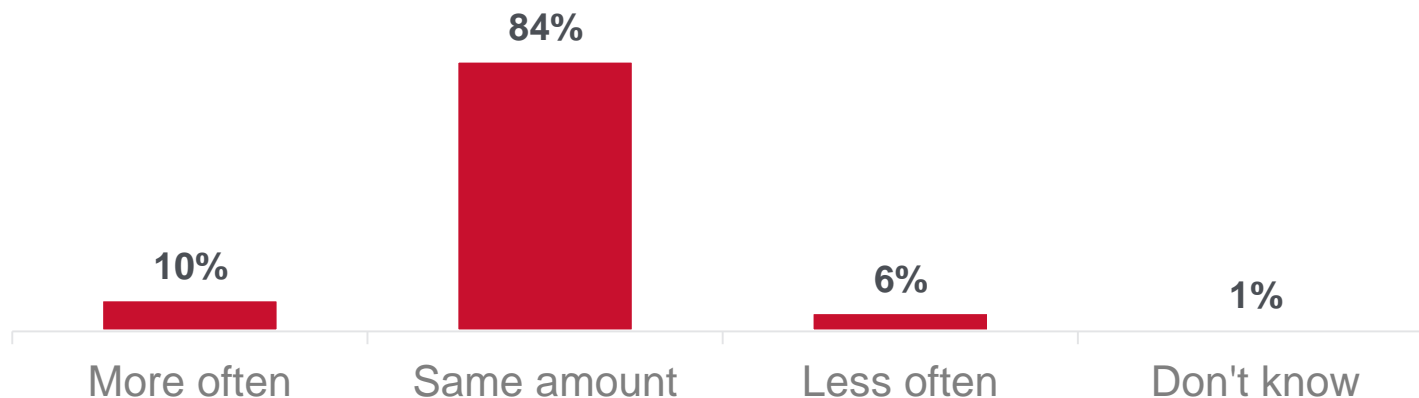
General population incidence of Calgary residents with a cannabis prescription: 4%

6. Have you ever smoked or otherwise consumed cannabis?  
(n=1,002)

7. Do you currently have a prescription for medical cannabis?  
(Base: current cannabis users, n=441)

## Expected Post-Legalization Usage: Users

Most current cannabis users expect their usage to stay the same after legalization.



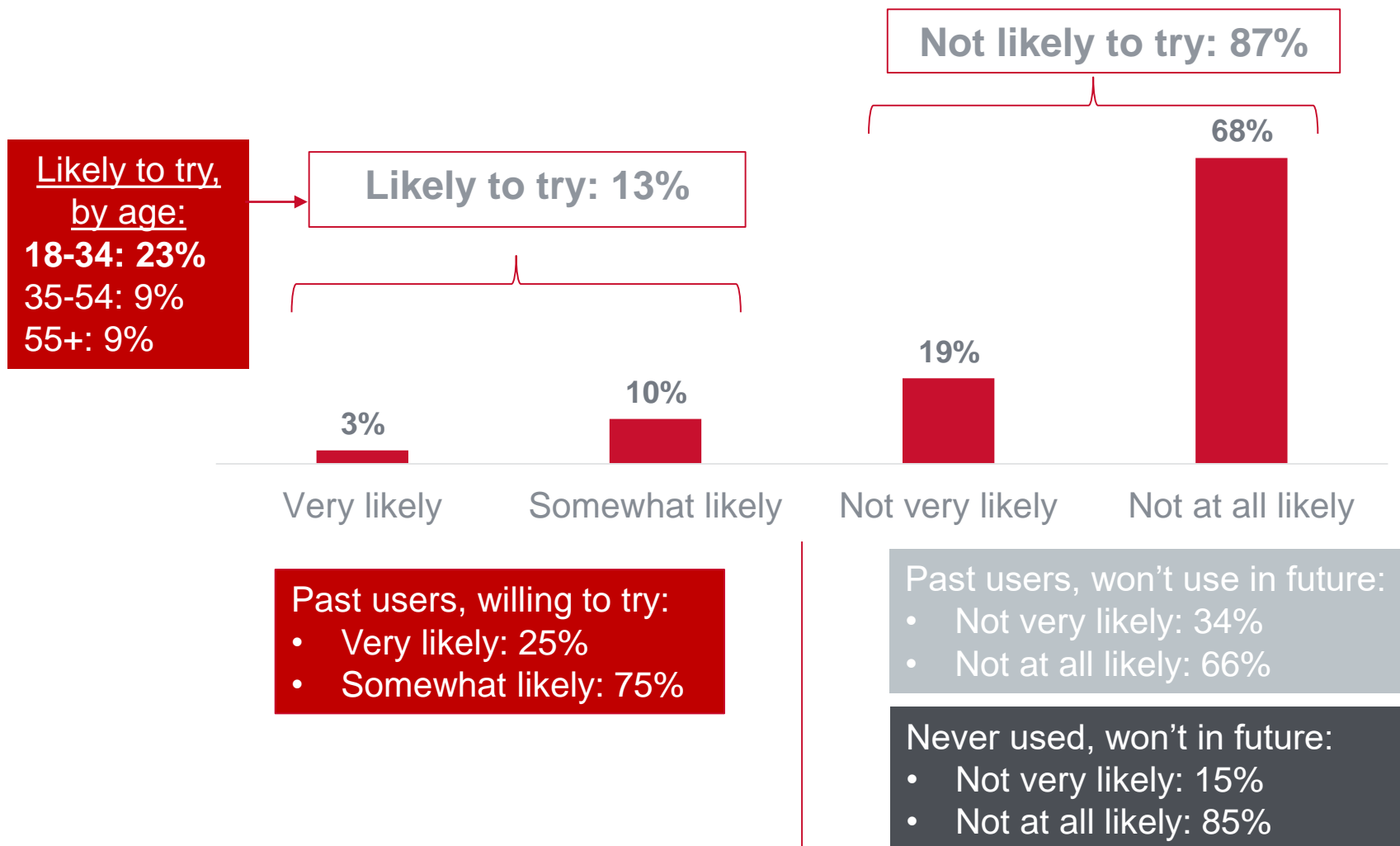
Expected Usage By User Type		
	Frequent (n=59)*	Infrequent (n=66)*
More often	5%	13%
The same	95%	76%
Less often	-	10%

9. Once recreational cannabis is legalized, do you expect to use cannabis more often, the same amount or less often than you do today?  
(Base: Current users, n=125)

\*Caution: Small Base

# Expected Post-Legalization Usage: Non-Users

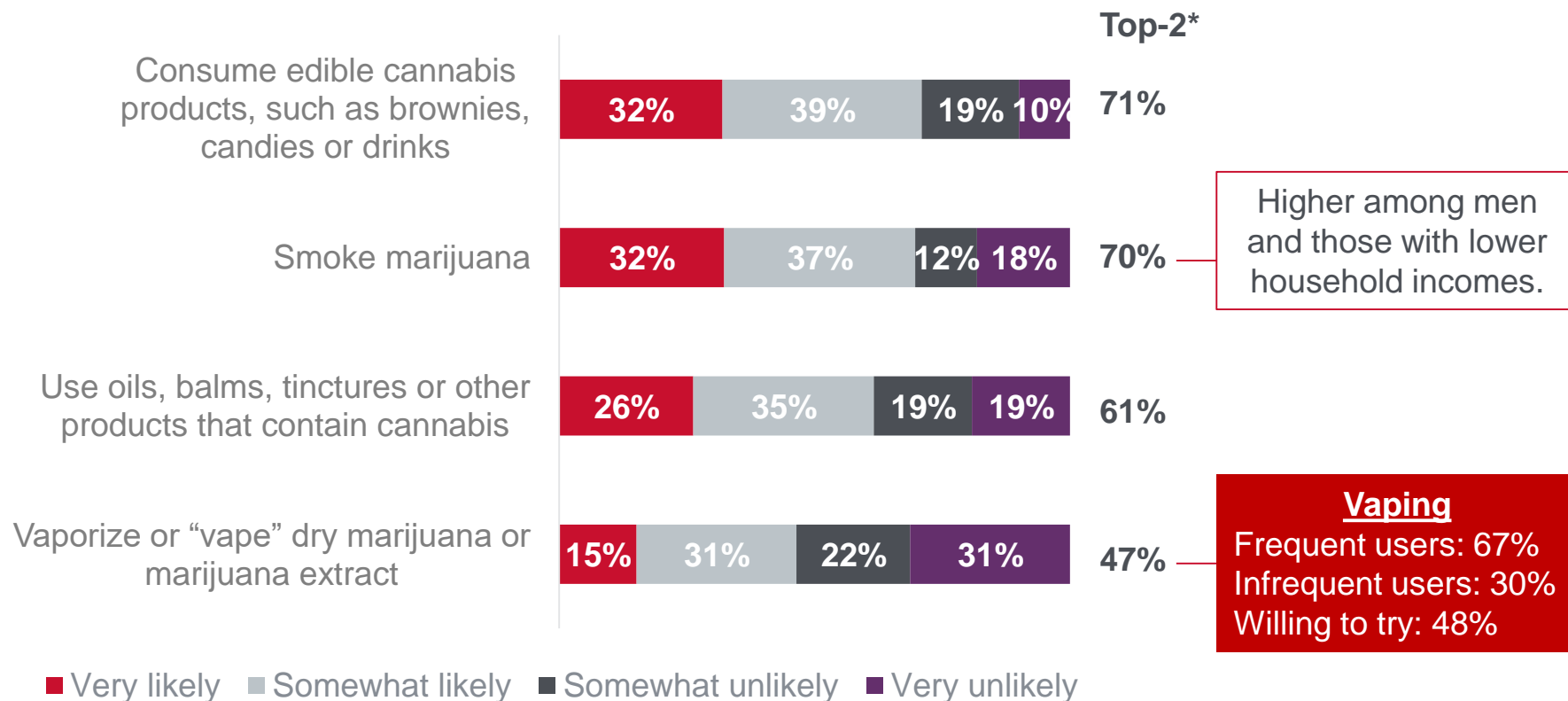
Slightly more than one-in-ten non-users expect to try cannabis after legalization.



10. How likely are you to [IF Q6=02: try cannabis / IF Q8=05: try cannabis again] once it becomes legal for recreational use? Are you ... (Base: those who have never used or no longer use cannabis, n=853)

# Anticipated Method of Consumption

Current and potential users (accounting for 26% of all Calgarians) are most likely to consume edibles or smoke cannabis.



11-14 Once recreational cannabis use is legalized, how likely would you be to do each of the following? For each one, please tell me if you are very likely, somewhat likely, somewhat unlikely or very unlikely to do this... (Base: cannabis users and intenders, n=213)

\*Top-2 includes those who are very or somewhat likely to do this

DK/NA for each item = 1%

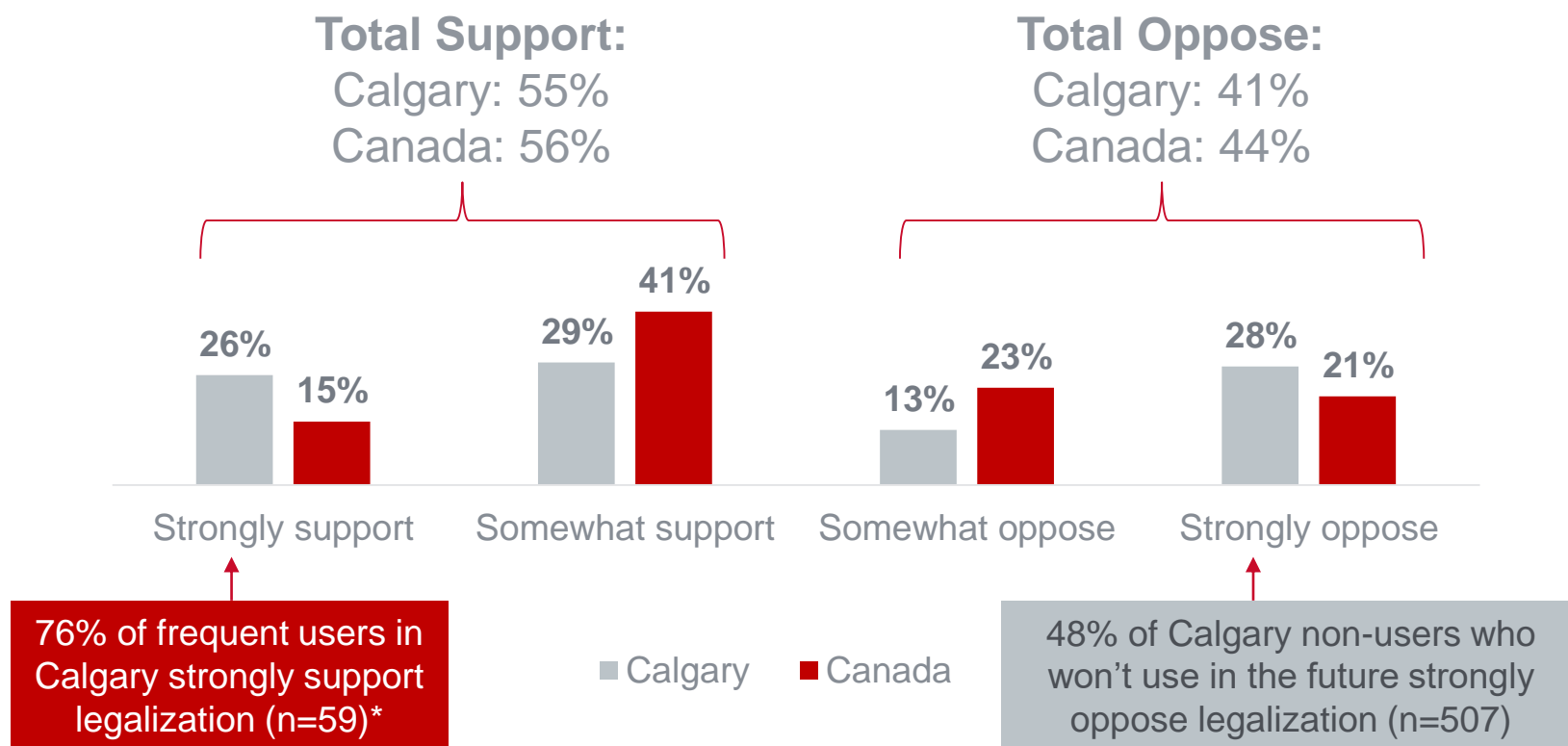
# Attitudes and Expectations Regarding Cannabis Legalization





# Support for Legalization: Calgary vs. Canada

Calgary is somewhat polarized between strong supporters and opponents of legalization.



1. Cannabis, also known as marijuana, will become legal for recreational use in Canada in July 2018. Do you support or oppose the proposed legalization of cannabis for recreational use in Canada? (And is that strongly or somewhat?) (Calgary n=1,002; Canada n=925)

\*Frequent users are defined as those who use cannabis at least once per week. Caution: Small Base.

## Support for Legalization: By Age

Younger Calgarians are significantly more likely to be in favour of legalizing cannabis, with older generations split.

### Total Support:

18-34: 71%

35-54: 47%

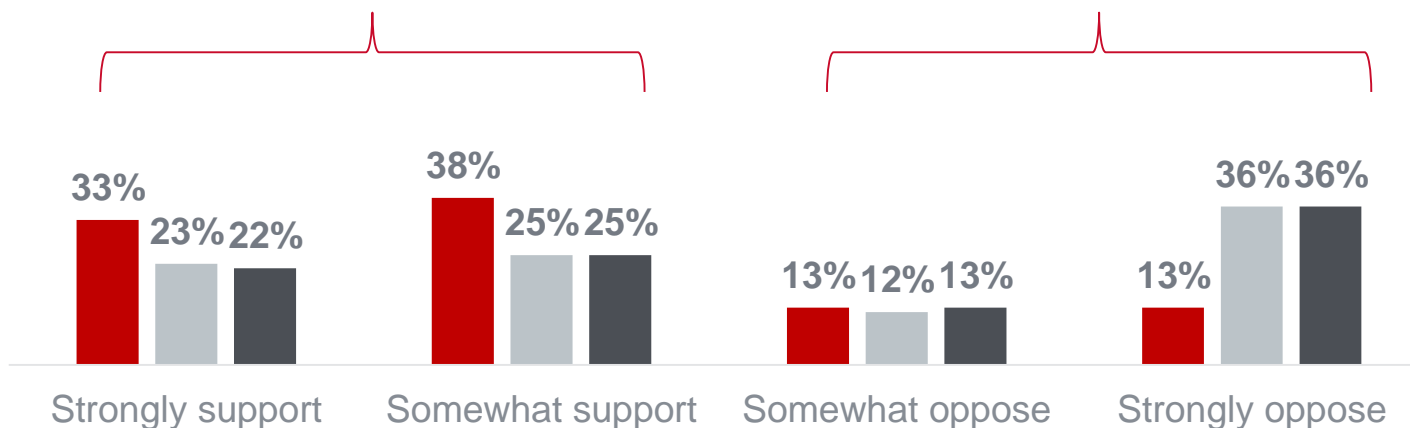
55+: 47%

### Total Oppose:

18-34: 26%

35-54: 49%

55+: 49%



Also higher among:

- Those employed full-time (60%)
- Those earning \$80K-\$120K (62%)

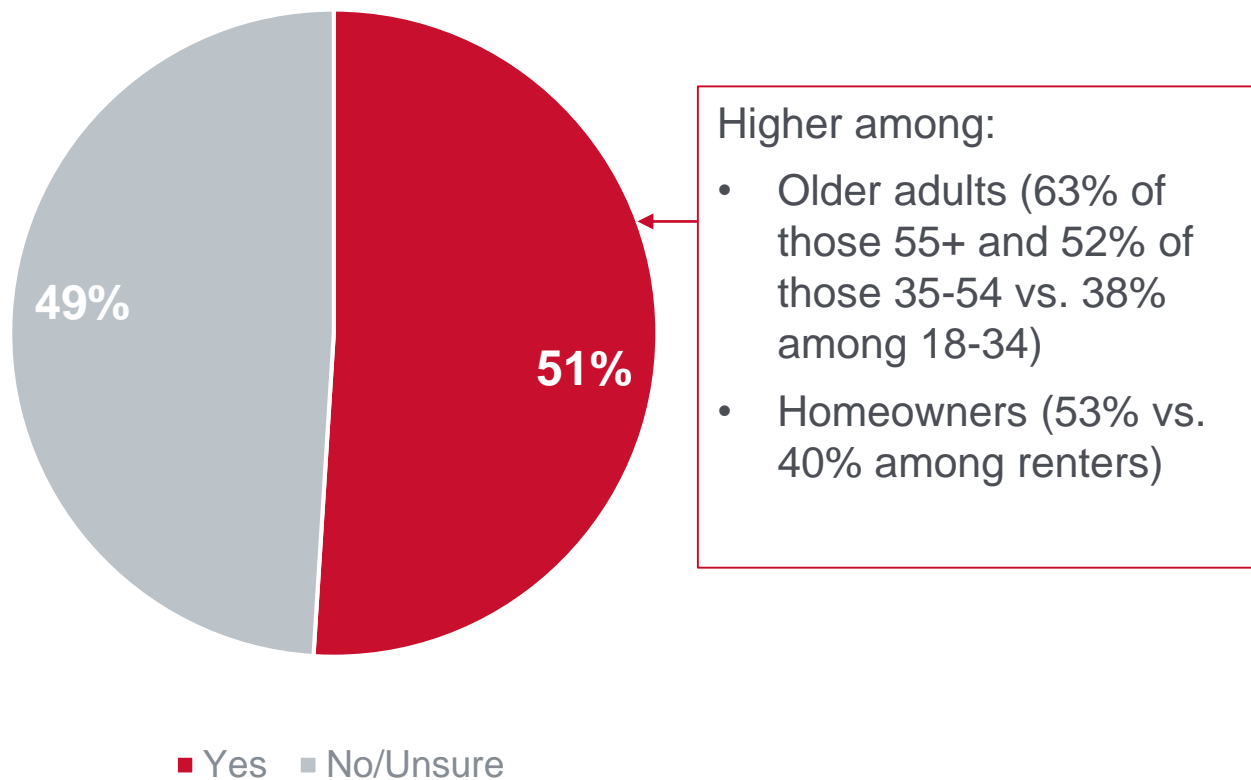
■ 18-34 ■ 35-54 ■ 55+

1. Cannabis, also known as marijuana, will become legal for recreational use in Canada in July 2018. Do you support or oppose the proposed legalization of cannabis for recreational use in Canada? (And is that strongly or somewhat?) (Calgary n=1,002; Canada n=925)

\*Frequent users are defined as those who use cannabis at least once per week. Caution: Small Base.

## Awareness of Alberta Regulation

Nearly one-half of Calgarians have heard, seen or read about Alberta's approach to regulating cannabis.



## Perceptions of Legalization

*Cannabis users and supporters of legalization did not anticipate major changes taking place once cannabis becomes legal, although some did expect increased enforcement to occur.*

- ▶ As expected, recreational and medical users of cannabis said they are very much in favour of, and excited about, cannabis becoming legal in Canada in July 2018.
- ▶ However, many users (particularly medical users) expected that legalization will lead to more “hassle” for them because there will be more rules to follow when it comes to public consumption and impaired driving. Some also expressed concerns about the cost of cannabis increasing once it is taxed and sold in retail stores.

*“It’s a step in the right direction. It will eliminate the dealer, for one, and people will not be getting in trouble and avoiding the stigma. I’m super pumped for people to be able to start growing plants.”*

*“If people can get access without the fear, it will help people’s anxiety, reduce spending on opiates, and have some more balance in the health care system.”*

*“I’d rather the money goes to the government. I’m paying a fair bit and I’d rather some money go to policing.”*

*“I’ve smoked it for 40 years and the more I hear the less I care. I just don’t care. It’s not going to change my life at all. They’re not talking about expunging drug convictions and I’ve survived this long with them on my record. I don’t care what they do now with the industry. It’s not going to change things for me.”*

## Perceptions of Legalization

*Opponents of legalization were most likely to be concerned about increased odour from cannabis smoke, as well as more cannabis users driving while impaired.*

- ▶ Most users did not expect legalization to have a major impact on them personally, or on the community at large. Supporters of legalization who do not use cannabis also did not expect there to be significant impacts, as they felt people will continue to use cannabis much as they have before, with the one key difference being that they will be able to buy it legally.
- ▶ Opponents of legalization - who as expected were not happy about cannabis becoming legal – were most likely to identify negative impacts to the community. Their main concerns included the odour of cannabis smoke becoming more prevalent, as well as more people driving while high.

*“It stinks: I don’t want to smell it when I’m going down the street or in my apartment building.”*

*“I’m concerned, even with my own kids, that they think that drinking is different than marijuana. People think they’re more capable of driving if they wait a little bit.”*

*“What I would like to see is realistic laws that focus on keeping kids away from marijuana, but there is the concern that the laws and regulations will be used to maintain the revenue stream by fines”*

*“As soon as it’s legalized there will be way more hassle from cops.”*

## Best/Worst Aspects of Legalization

*Participants in each group were asked to develop lists of the best and worst aspects of cannabis legalization. These items, along with the groups most likely to mention them, are highlighted below:*

### Best Aspects

- Less stigma about using cannabis (users)
- Removes “criminal element” from cannabis sales (non-users)
- Fewer harmful substances in cannabis, such as fentanyl (non-users)
- Revenue from cannabis sales (all, but mixed views)
- Potential health benefits (all)
- New products/opportunities (users and non-users)
- More product availability (users)
- Makes it easy to identify and avoid users (opponents)

### Worst Aspects

- Odour/exposure to cannabis smoke (opponents, and to a lesser extent non-users)
- Government control/more regulation (users)
- Higher costs for cannabis and potential to continue accessing black market (users)
- Long-term negative health impacts and costs (opponents and non-users)
- More impaired driving (opponents and non-users)
- “Unnecessary” crackdown on impaired driving (medical users)



## Retailer Intentions

*Most potential retailers said they aspire to open multiple stores, but will not move forward with plans until The City sets its application process in place.*

- ▶ Most potential retailers who were interviewed expected to open anywhere from one to five retail locations within Calgary, with the final number depending on how the market evolves.
- ▶ Some of those who expect to open retail stores said they intend to convert other existing types of businesses into a store that sells cannabis.
- ▶ Many of those who intend to open a cannabis retail location expected to do so in a commercial location, such as a strip mall or suburban power centre. For many of those potential retailers, key factors influencing their decision included having ample parking, as well as being in an area with high vehicle and/or pedestrian traffic.
- ▶ Although some said they intend to open stores in higher-density areas closer to downtown, others said they were somewhat deterred by these types of locations because they could end up being too close to liquor stores or other cannabis retailers.
- ▶ Most potential retailers expected to open stores that are approximately 1,000 to 2,500 square feet, with sufficient space in place to securely store cannabis.

*“We’re looking for convenience, placed with good parking and places where people wouldn’t have to travel far to get to.”*

*“We’ve been working on retail rollout for the last three years and based on the new regulations that are constantly coming out every day, we’ll pivot. But as far as our plan is concerned, it’s pretty set in stone. It’s only going to have a few changes based on the government’s process for licensing.”*

## Producer Intentions

*Most involved in cannabis production expect to operate outside Calgary, with some retailers also expressing an interest in “micro-growing” and “micro-processing” on site if this is eventually allowed.*

- ▶ Most of those involved in production have placed their operations outside of Calgary. The reason most gave for placing their operations in smaller cities or rural communities is because of the lower cost of land in these areas.
- ▶ Some producers also expected or hoped to open retail cannabis stores, although others said they intend to focus strictly on producing cannabis for the Calgary retail market, as well as for other parts of Alberta/Western Canada.
- ▶ Meanwhile some involved in retail hope to be able to engage in “micro-growing” or “micro-processing,” where small amounts of cannabis are grown and processed at a retail location. Many compared this process to how craft brewers will produce and sell relatively small quantities of beer at their own retail locations. However, those who hope to do this noted that this will require significant changes in federal laws regulating cannabis production.

*“We looked at locations in Calgary and outside, but in Calgary it was too expensive.”*

*“To make an analogy to the beer market, we have micro-breweries that produce specialty brews and people like them. I think micro-growing is something The City could look at.”*

# Public Consumption

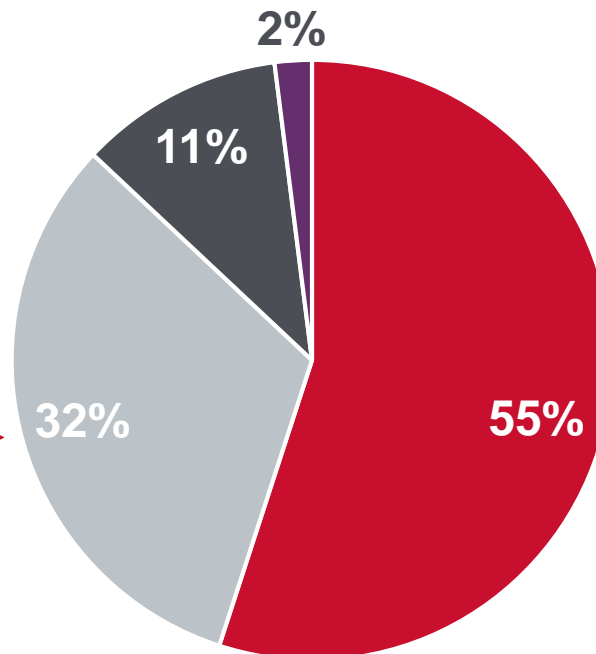




## Preference for Public Consumption Rules

Calgarians prefer cannabis usage rules to be like those for alcohol consumption.

**56% of frequent users in Calgary believe rules should be similar to rules around public tobacco consumption (n=59)\***



Those earning higher household incomes are more likely to support making the rules similar to public alcohol consumption.

■ Drinking alcohol in public  
■ Neither of these

■ Smoking or vaping tobacco in public  
■ Don't know

15. Do you think the rules around public consumption of cannabis should be more like the rules for drinking alcohol in public, or more like the rules for smoking or vaping tobacco in public? (n=1,002)

\*Frequent users are defined as those who use cannabis at least once per week. Caution: Small Base

## Attitudes Towards Public Consumption

*Opponents and non-using supporters agreed that there should be clear limits on where cannabis can be consumed.*

- ▶ There were very different views regarding public consumption expressed in different groups. Opponents expected that they will be more likely to be exposed to cannabis smoke once legalization occurs, and they wanted strictly enforced rules in place limiting where people can consume cannabis. Non-using supporters also shared the view that cannabis should be treated like alcohol and that consumption should be limited to private property and licensed/restricted spaces.
- ▶ Much of the discussion around these rules focused on smoking cannabis, and the notion that people should not be exposed to cannabis odour and second-hand smoke. Opponents and non-users generally agreed that these rules should also apply to vaping. With edibles, however, members of these two groups recognized that rules around public consumption will be potentially much harder to enforce.

*"If tobacco users have to leave a facility in minus-45 degree weather to have a cigarette, then why shouldn't cannabis users?"*

*"You're not allowed to smoke cigarettes on bar patios, so why should you be expected to (use) weed?"*

*"When you're walking down the street, you can have a cigarette. You can be walking by someone who is allergic to it or a child and they will have issues. (Cannabis) should be more like alcohol, where you can't consume it in public."*

## Attitudes Towards Public Consumption

*Recreational and medical cannabis users, on the other hand, were opposed to firm rules on public consumption and advocated for leniency.*

- ▶ Recreational and medical users, on the other hand, felt that public consumption rules should be very permissive, and many bristled at the idea of setting strict rules about where people can and cannot consume cannabis. Medical users, in particular, tended to agree that they should be exempted from public consumption rules because cannabis is “medicine” and no one would be prevented from taking pills or using an inhaler in a public place.
- ▶ Medical and recreational users also distinguished between smoking and vaping. Most acknowledged that they expect limits on where cannabis can be smoked, but several noted that vaping is odourless and therefore should be allowed in public areas.

*“I think it’s fair that users should respect people that don’t want cannabis. If you’re walking by a day care, I don’t think people should be smoking (cannabis) outside.”*

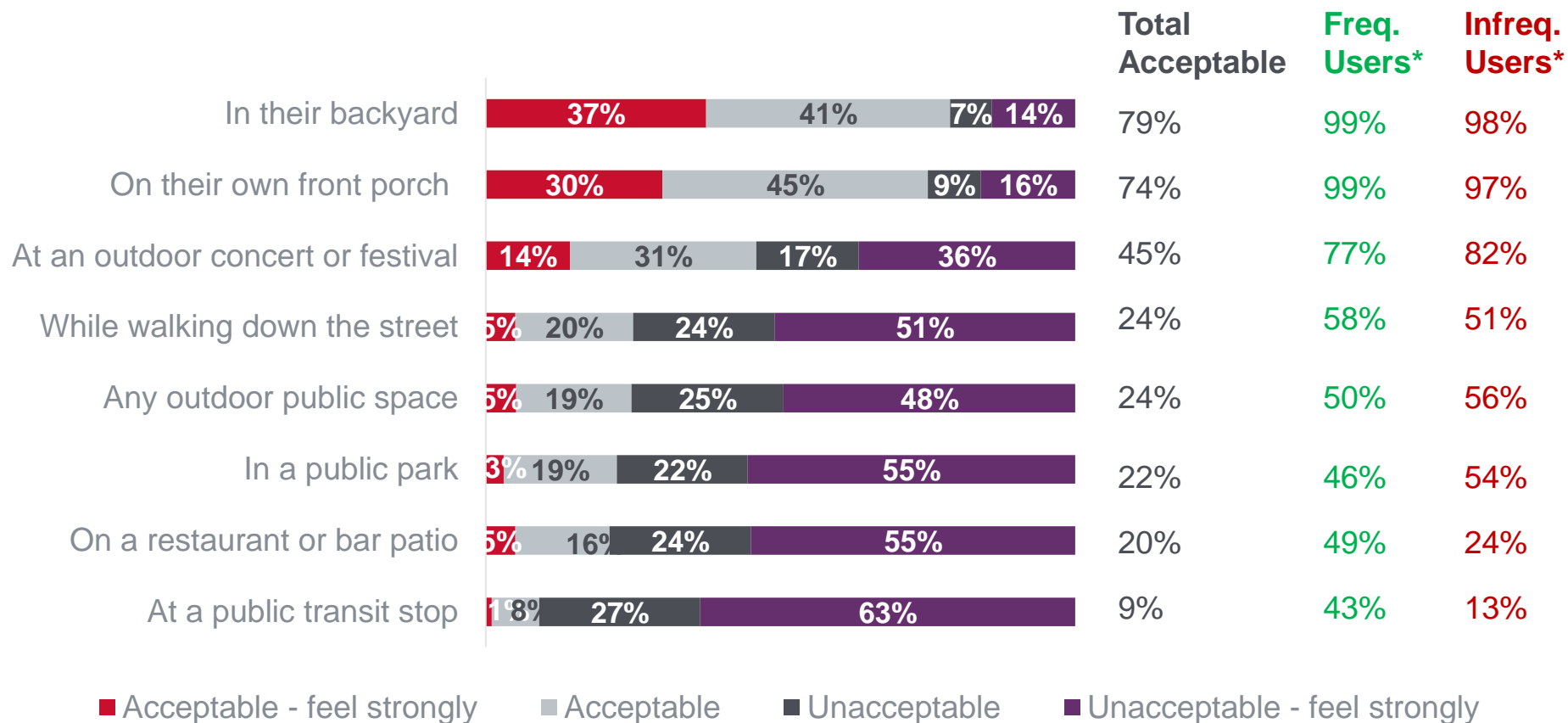
*“If I can walk down a street and have a cigarette, why shouldn’t I be able to do the same thing with a joint?”*

*“You don’t need to smoke to use weed. If someone eats a gummi bear in an elevator, you’re not exposing anyone to any contaminants. It shouldn’t be an issue for anyone.”*



# Attitudes Towards Public Consumption in Specific Locations

Majorities of Calgary residents believe that it is unacceptable to consume cannabis in most public spaces.



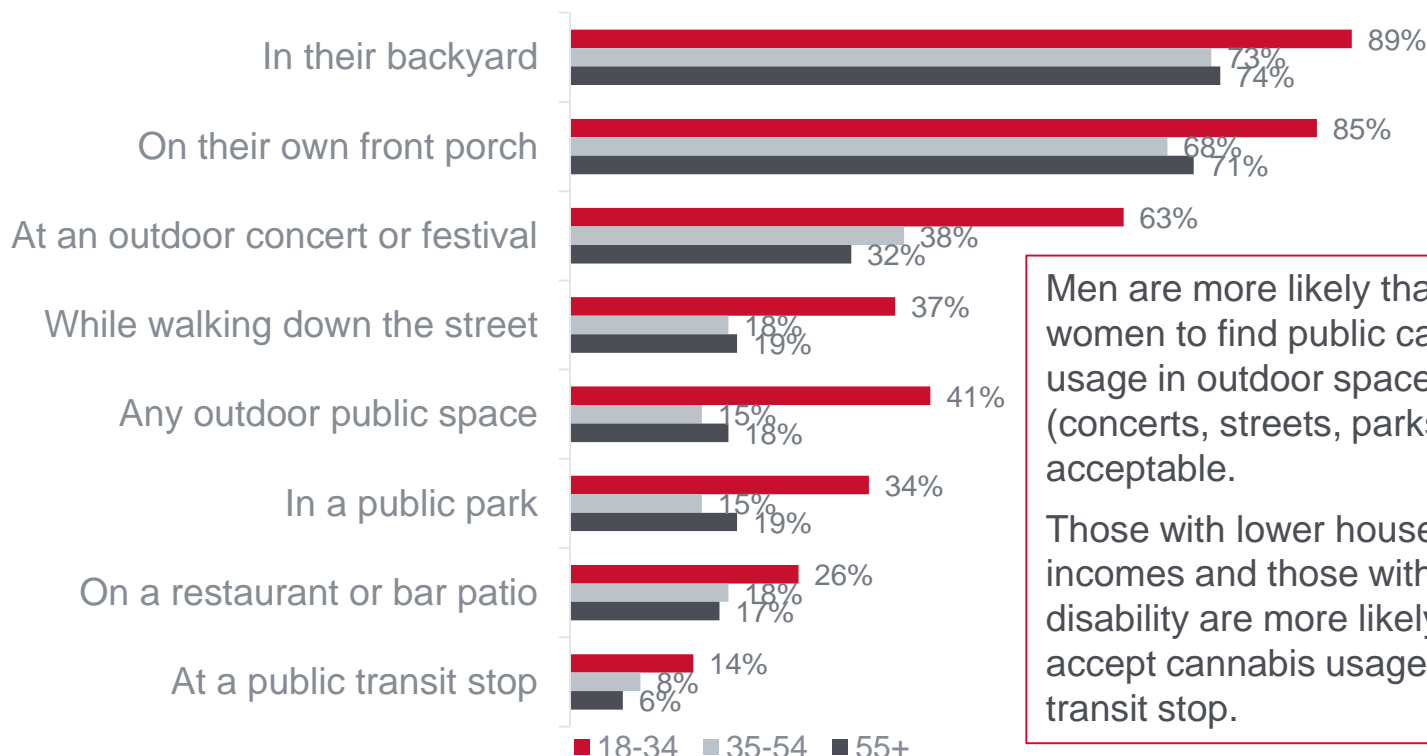
16-23 Once cannabis becomes legal, would you find it acceptable or unacceptable for people to consume cannabis in the following places: (And do you feel strongly about this?)

\*Note: Frequent users are defined as those who use cannabis at least once per week, whereas infrequent users consume cannabis monthly or less (Frequent users n=59; infrequent users n=66. Caution: Small Bases)

# Attitudes Towards Public Consumption in Specific Locations: By Age

Although younger adults are more tolerant of public consumption, a majority says it is unacceptable to consume cannabis in parks, on streets and other public places.

% of those who say this is “acceptable” to consume cannabis in this location

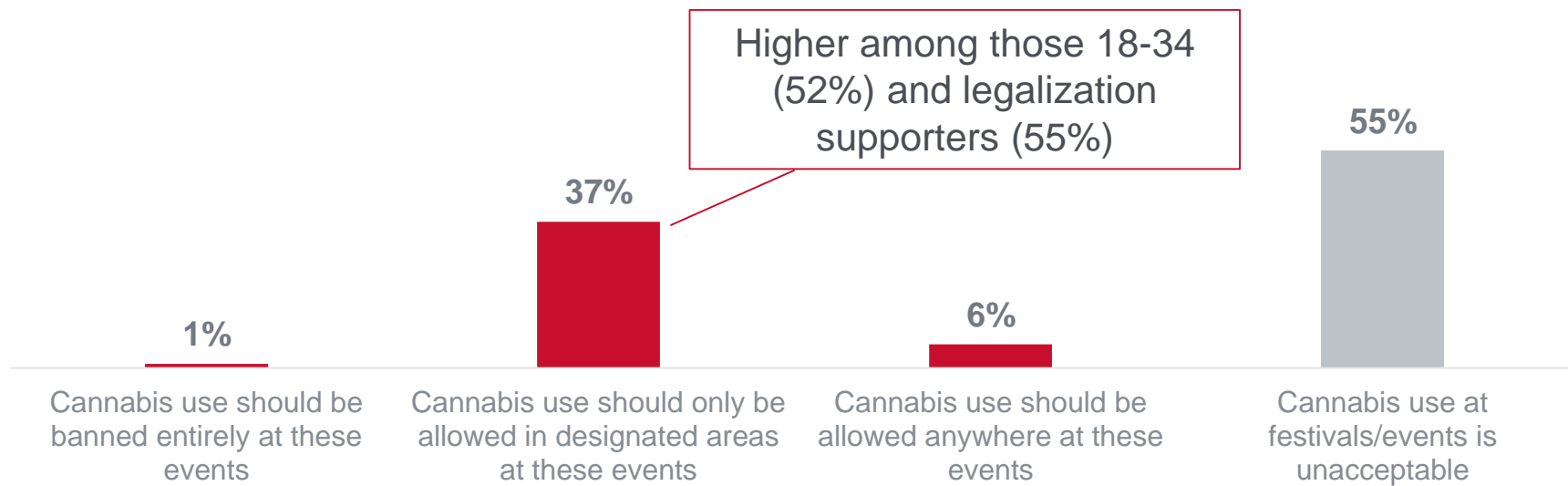


Men are more likely than women to find public cannabis usage in outdoor spaces (concerts, streets, parks) acceptable.

Those with lower household incomes and those with a disability are more likely to accept cannabis usage at a transit stop.

## Attitudes Towards Use At Public Events

One-half of Calgarians say cannabis use at events/festivals is not acceptable – with those who accept most likely to want consumption limited to designated areas.

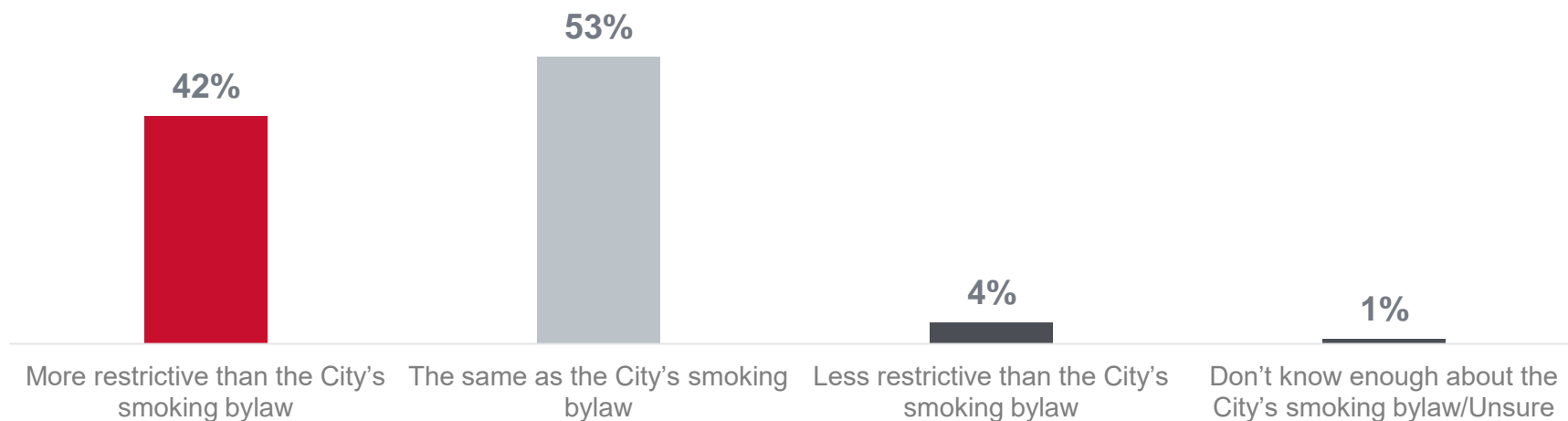


### Views By User Type

	Current/potential user (n=213)	Current/future non-user (n=763)
Ban entirely at events	2%	1%
Allow in designated areas	61%	29%
Allow anywhere	13%	4%
Use at events is unacceptable	23%	67%

# Comparison of Cannabis Rules With The City of Calgary Smoking Bylaw

Most Calgarians want rules around cannabis consumption to be similar to, or stricter than, The City's smoking bylaw.



## Views on legalization

Supporters: 22%  
Opponents: 69%

Supporters: 71%  
Opponents: 28%

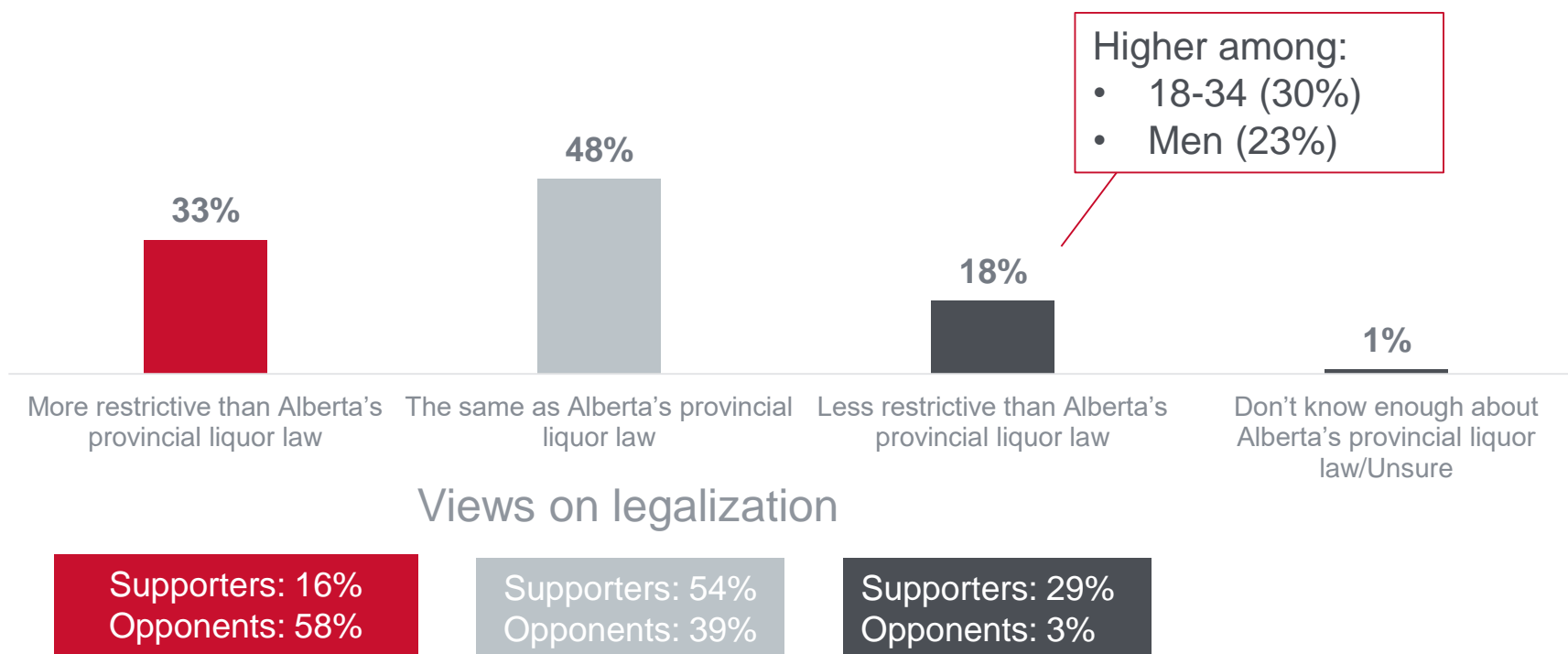
## By age

	18-34	35-54	55+
More restrictive	31%	50%	44%
The same	61%	46%	52%
Less restrictive	6%	3%	4%

25. The City of Calgary's smoking bylaw restricts where people can smoke tobacco or use e-cigarettes by banning smoking in indoor public places and at outdoor public facilities, including transit stops, playgrounds and outdoor recreation areas. Should the rules regarding the public use of cannabis in Calgary be ... (n=1,002)

# Comparison of Cannabis Rules With Provincial Liquor Laws

Most Calgarians want cannabis rules to be at least as strict as provincial liquor laws.



## Acceptable Places For Public Consumption

*Despite having very different views on the need for regulations, most participants agreed that smoking/vaping cannabis should not be allowed indoors, on patios or in places where children are likely to be present.*

- ▶ Across all groups, there was a consensus that cannabis usage should not be permitted in places where children are present (such as playgrounds or near schools and day care facilities), as well as indoors. This was mainly discussed in the context of smoking cannabis and exposing others to second-hand smoke.
- ▶ Most also agreed that restaurant and bar patios should not allow users to smoke or vape cannabis for the same reasons that they do not permit tobacco use in these spaces (namely, because people do not want to be exposed to second-hand smoke).
  - ▶ Many recreational and medical users, however, were hopeful that cannabis lounges/cafes will be allowed to open soon, and some of these participants felt that businesses should be allowed to decide for themselves if they wish to permit patrons to smoke or vape cannabis.

*"If they match it with tobacco laws, I don't think there will be an issue. If they are different, then we will have issues with tobacco and cannabis. From a City perspective, you shouldn't be able to smoke anything in these areas, otherwise it will get confusing"*

*"Parks are great, it's open, you can pick a spot and if people don't want to be around weed they will just walk around you, it's open air, you're not going to stink up the whole place."*

*"People shouldn't be allowed to smoke in certain places, like school properties and playgrounds."*



## Acceptable Places For Public Consumption

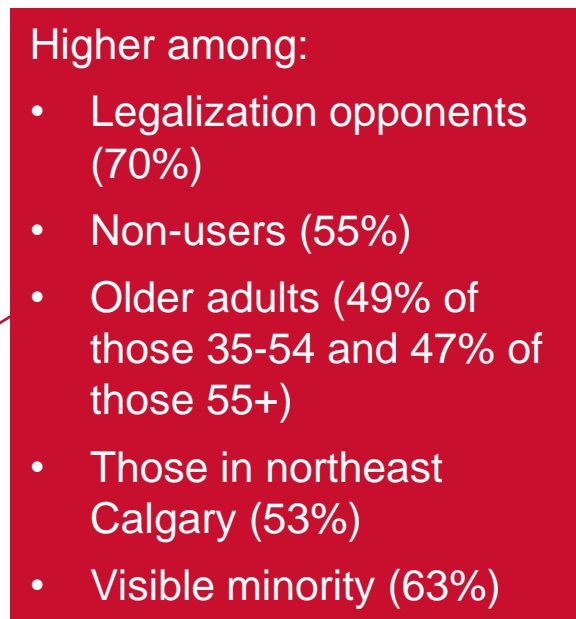
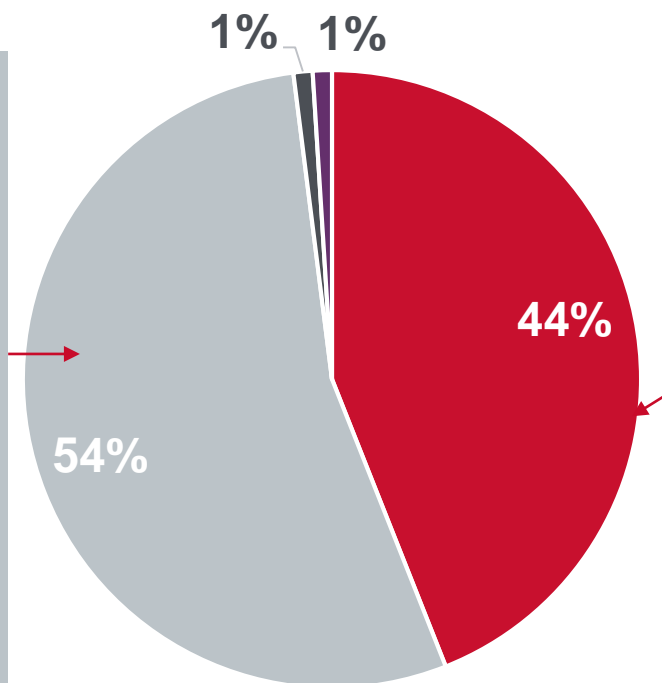
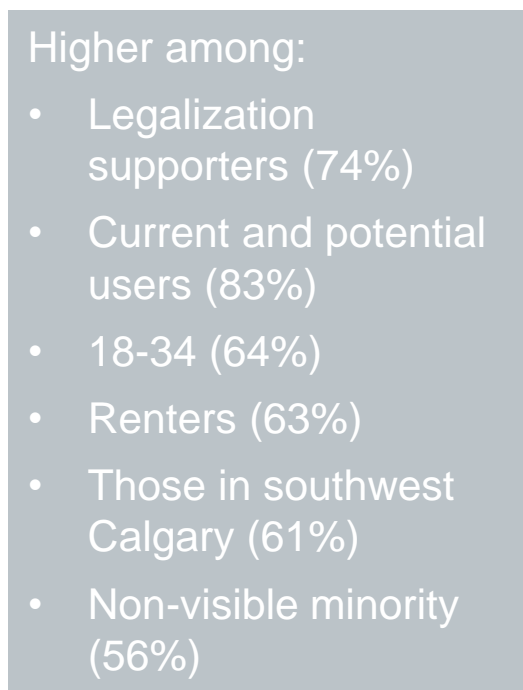
*There was a great deal of support for the idea of designated “cannabis zones” at outdoor public events, although some users wondered whether people will continue to use cannabis anywhere at these events.*

- ▶ There was also broad support across groups for the idea of setting up “cannabis zones” at outdoor public events, such as concerts. Many participants expected that this will become a new norm at these types of events.
  - ▶ Although some users were resistant towards this idea (mainly because they expected people to continue using cannabis anywhere at concerts), many participants felt that cannabis use at outdoor events will be treated in a manner similar to how tobacco is treated, with smokers using designated outdoor areas.
- ▶ Users, non-users and opponents also agreed that cannabis use in bus shelters should not be permitted, with users more likely to support allowing usage at bus stops. Many participants, including users, felt that cannabis users should be courteous of those who do not want to be exposed to second-hand smoke within the shelter.

*“You should have a designated place, like they do with smoking. Even at the Stampede, Folk Fest, you have to smoke near the fences.”*

## Enforcement Expectations

Calgarians are split between strict and flexible enforcement of cannabis rules.



- Police and bylaw officers should enforce these laws very strictly
- Police and bylaw officers should generally enforce these laws, but also have some flexibility
- Neither of these
- Don't know

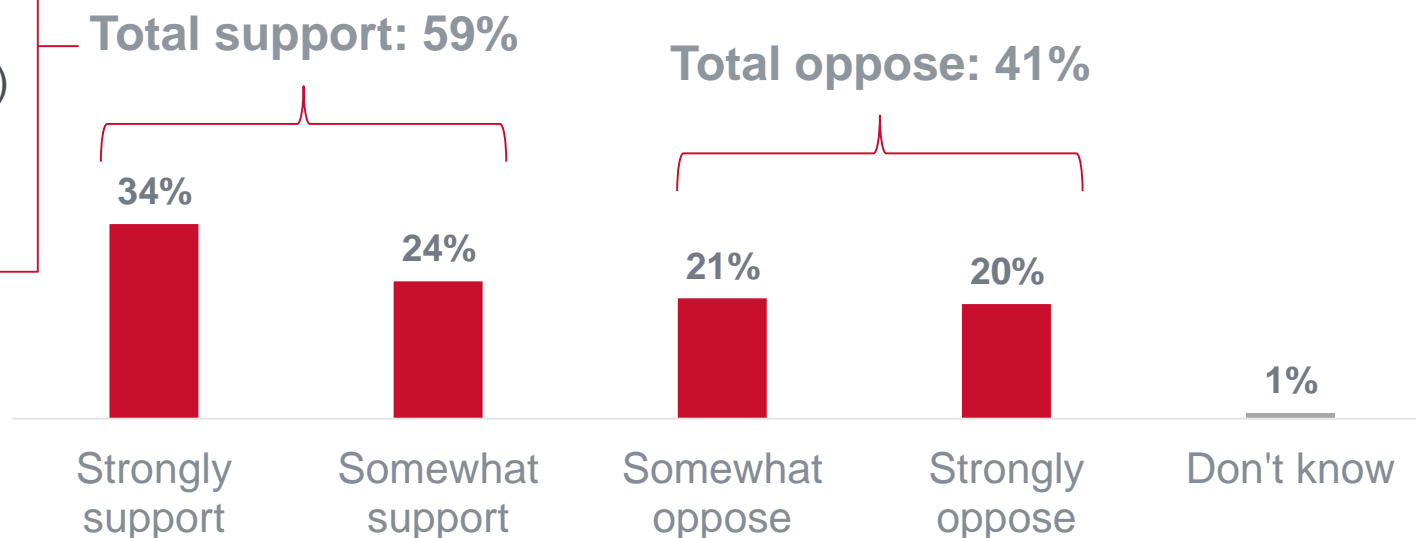
27. When recreational cannabis use becomes legal, how strictly do you think the laws related to public consumption should be enforced? Do you think... (n=1,002)

# Support For Hiring More Enforcement Officers

Calgarians support The City of Calgary hiring more officers to monitor public consumption of cannabis.

Higher among:

- Women (65%)
- Legalization opponents (76%)



## Views By User Type

	Current/potential user (n=213)	Current/future non-user (n=763)
Strongly/somewhat support	42%	65%
Strongly/somewhat oppose	58%	34%

28. Do you support or oppose the City of Calgary hiring more police officers and/or bylaw enforcement officers to monitor public consumption of cannabis? (And is that strongly or somewhat?) (n=1,002)

## Attitudes Towards Enforcement

*Most users and non-users felt that enforcement should be dependent on the circumstances of someone using cannabis in public.*

- ▶ Most users and non-users who support legalization said nearly all cannabis users exhibit common sense and courtesy when using cannabis in public. For this reason, many of these participants felt that police and bylaw enforcement officers should be allowed to have a degree of discretion when enforcing rules related to public consumption.
  - ▶ Medical and recreational users were much more likely to question the extent to which more enforcement is necessary, as several were resistant towards the idea of putting additional rules around public consumption in place.
- ▶ Opponents of legalization, on the other hand, were more likely to support law enforcement taking a harder line on consumption, as they were also more likely to complain about being exposed to second-hand smoke from cannabis in different public places.

*"If there becomes more enforcement, how is that more legal? The point is we don't want much enforcement involved. How much do they spend enforcing cigarettes? There shouldn't be extreme costs and a lot of the costs should be able to come out of the current budget for marijuana policing right now, just pushing them over to bylaw."*

*"I think there will be a need for more bylaw (officers) because if someone is committing an infraction bylaw will need to respond to it faster."*

*"If it's a bus shelter and it's raining and you're smoking, and an officer walks by, that shouldn't be a \$500 fine."*

## Attitudes Towards Enforcement

*Several participants felt that enforcement of public consumption rules should be similar to how these rules are enforced for alcohol.*

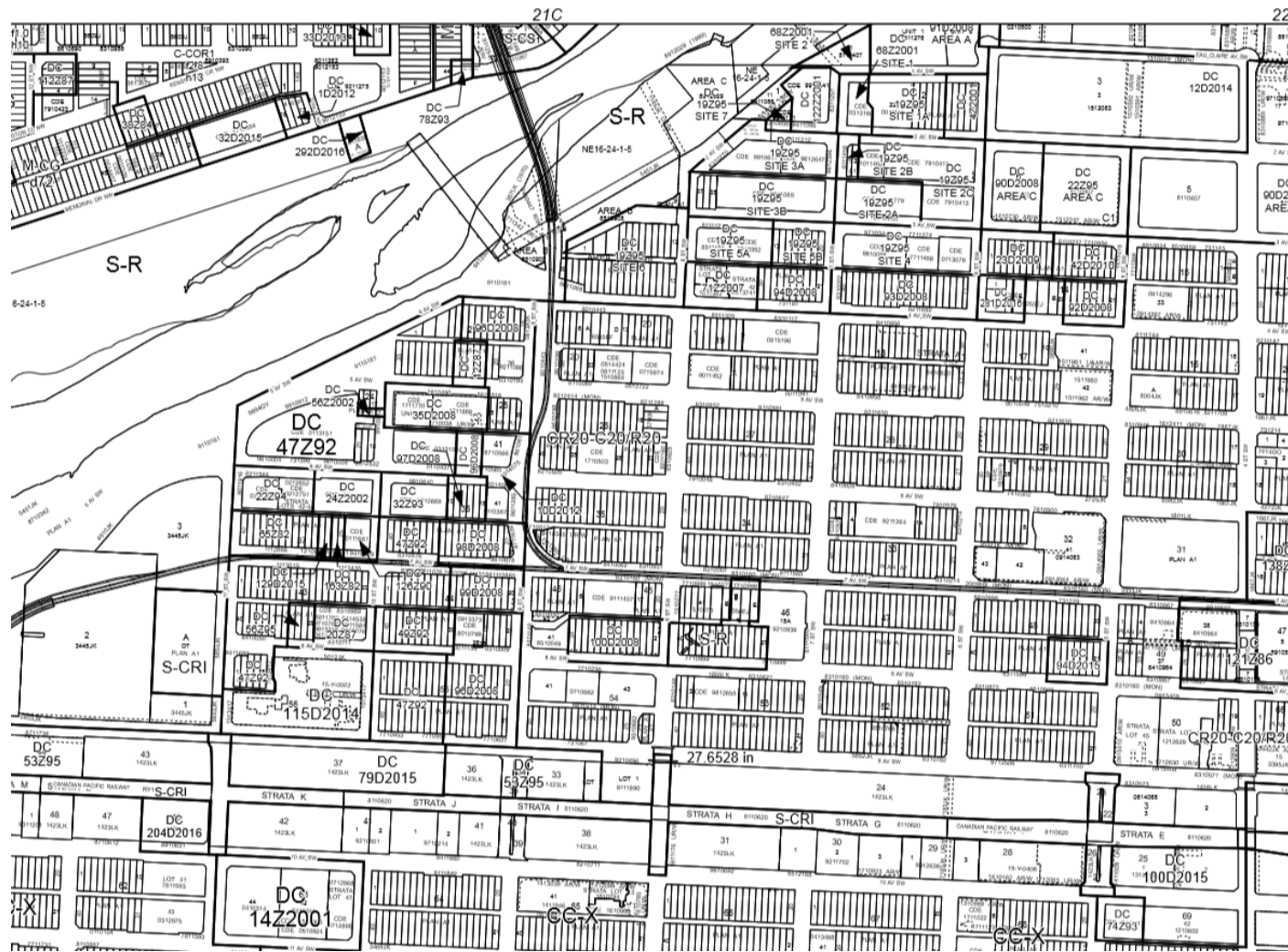
- ▶ Many users and non-users felt that the circumstances for law enforcement officers fining people for breaking public consumption laws should be conditional. For example, some said that if cannabis use is not allowed in parks, enforcement officers should not write a ticket if someone is consuming and no one is around – whereas they would be more supportive of fining users if children are nearby.
  - ▶ Some compared this to drinking alcohol in public, distinguishing between situations where someone is quietly drinking in a public place and would be unlikely to get a ticket versus a situation where someone is very intoxicated and bothering others.
- ▶ Nearly all participants agreed that a significant amount of public education is required to help people understand the new rules once they are put in place.

*“There’s discretion with alcohol and with even pot now. If you’re standing on the side of the street and there’s a high school nearby but they’re walking into their house, that’s a warning.”*

*“It’s like cigarettes—there might be a sign on a door saying no smoking within five metres, but if it’s minus-40 everyone will be huddling around the doors.”*

*“There should be discretion. It depends on the situation and if anyone is around or is being harmed. If you’re in an area where you shouldn’t be and people are complaining, that’s one thing, but if no one’s around and someone just wants to make their quota for the month, that’s another.”*

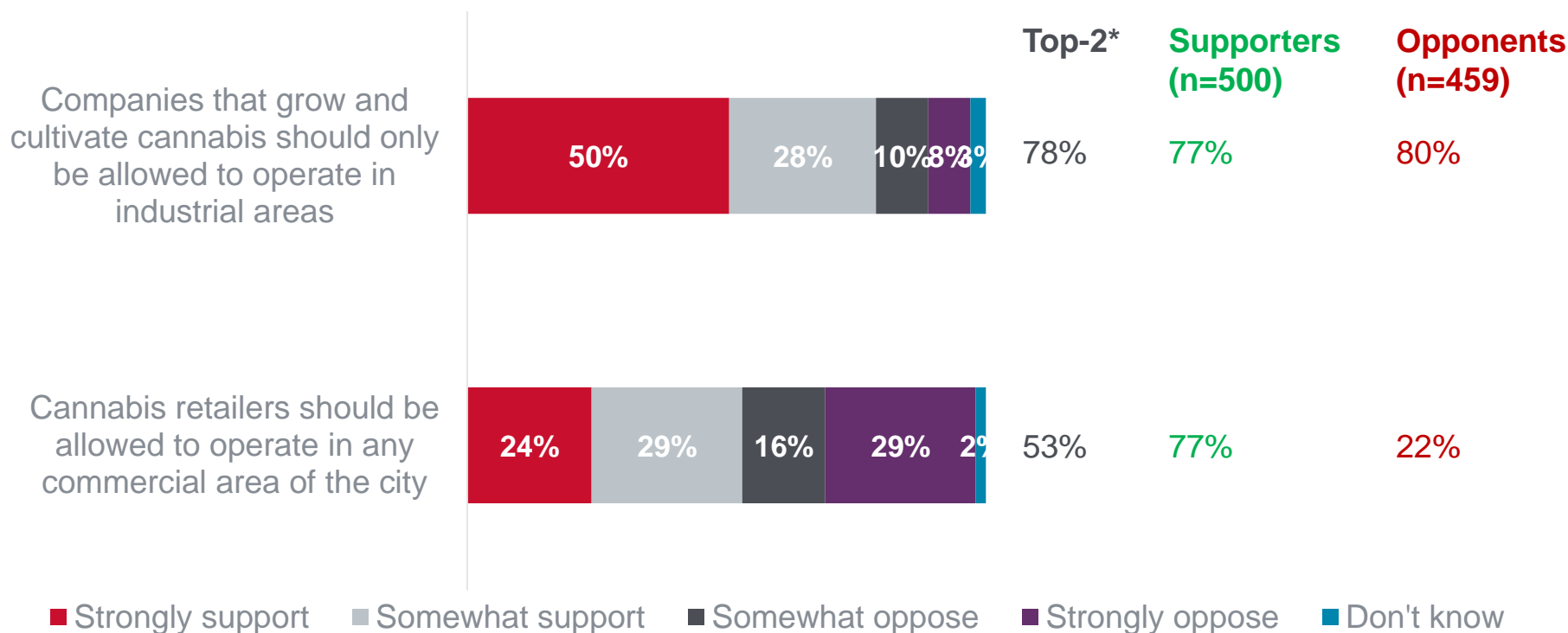
# Siting, Zoning and Business Operations





## Views on Siting Growers/Retailers

Calgarians support restricting commercial cannabis production to industrial areas, but are somewhat flexible about retail.



34-35 Please tell me if you strongly support, somewhat support, somewhat oppose or strongly oppose the following ideas: (n=1,002)

\*Top-2 includes those who strongly or somewhat support this idea

## Views on Siting Growers/Retailers: By Region

Residents of northwest Calgary are most likely to want restrictions on cannabis retailers in commercial areas.

Growers only in industrial areas

Support: 78% / Oppose: 20%

Allow retail in all commercial areas

Support 44% / **Oppose 54%**

Northwest

North-east

Growers only in industrial areas

Support: 73% / **Oppose: 25%**

Allow retail in all commercial areas

Support 55% / Oppose 44%

Southwest

South-east

Growers only in industrial areas

Support: 79% / Oppose: 16%

Allow retail in all commercial areas

**Support 59%** / Oppose 38%

Growers only in industrial areas

**Support: 82%** / Oppose: 15%

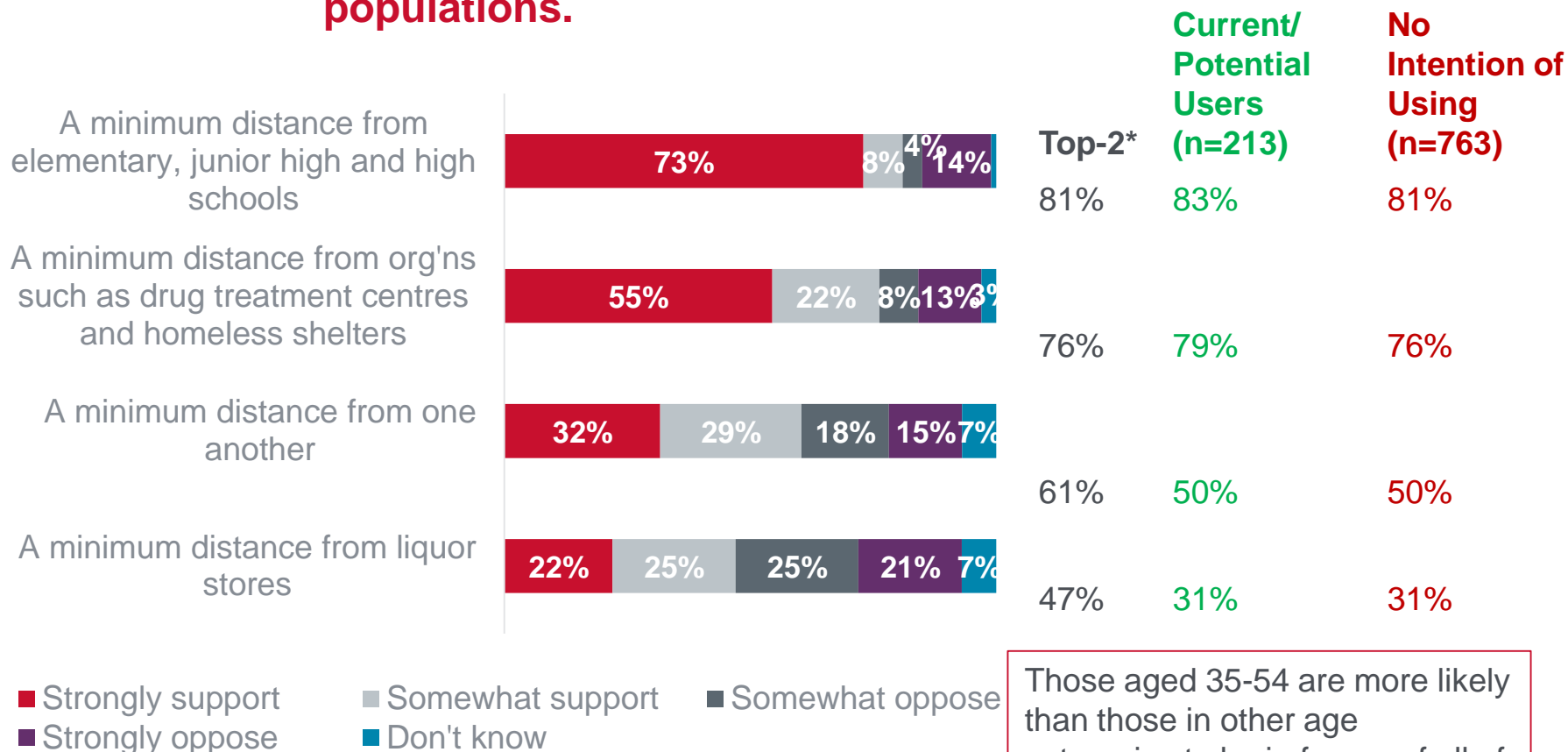
Allow retail in all commercial areas

Support 56% / Oppose 42%

Younger adults aged 18-34 are more likely to be in favour of allowing cannabis retailers to operate in any commercial area (63% vs. 48% of those 55+)

# Views Regarding Siting Restrictions

**Most Calgarians support keeping cannabis retailers a minimum distance from schools and vulnerable populations.**



Those aged 35-54 are more likely than those in other age categories to be in favour of all of these siting restrictions.

36-40 Do you support or oppose placing the following restrictions on where cannabis retailers can operate? (And is that strongly or somewhat?) (n=1,002)

\*Top-2 includes those who strongly or somewhat support the idea

## Siting Cannabis Retailers

*Participants agreed on keeping cannabis retailers away from schools, with opponents also favouring tougher restrictions.*

- ▶ Opponents and supportive non-users had somewhat different conceptions of what cannabis retail shops will be like, with opponents most likely to picture “head shops” and to have a very negative perception of these places, and supportive non-users more likely to picture something more akin to a cigar shop.
- ▶ When asked how far these stores should be located from certain land uses, supporters and non-users alike agreed that they should be far from schools, day cares and playgrounds, with even further minimum distance restrictions than those for liquor stores.
  - ▶ Opponents were also more likely to be in favour of additional minimum distance restrictions for parks, churches, drug treatment facilities, hospitals and even residential neighbourhoods.

*“My major concern is schools, same with alcohol.”*

*“300 metres (from schools) is fine. You can’t over-regulate it because it becomes too complicated. Keep it simple, the same as for liquor stores.”*

*“I think cannabis will be sold in separate stores, and we’ll have too many at first, and after six months they will all begin to go bankrupt except for a few that become professionalized.”*

## Siting Cannabis Retailers

*Participants (even opponents) tended to be less concerned about the proximity of cannabis retailers to liquor stores.*

- ▶ Both opponents and non-users tended to be less concerned about cannabis stores being located near liquor stores: although most felt that they should not be co-located or right beside one another, they did feel it would be acceptable for them to be located on the same block or within the same commercial strip mall.
- ▶ Participants did not have strong views on minimum distances between cannabis retailers, yet some felt they should be further from each other than liquor stores, as some felt the current rules have led to too many liquor stores in Calgary.
- ▶ (Current users were not asked about this issue in their sessions).

## Zoning/Siting Expectations - Retailers

*Potential retailers supported minimum distances for cannabis retailers from schools, but said they would prefer shorter minimum distances between cannabis retailers and liquor stores.*

- ▶ Most retailers expected (and strongly supported) restrictions on where they can operate, particularly restrictions on how far they have to be located from schools and playgrounds. Some felt that the current rule ensuring that liquor stores must be 150 metres away from a school should be replicated for cannabis retailers, with others even suggesting that the minimum distance could be further than 150 metres.
- ▶ There were mixed views regarding minimum distances from day care facilities. Some supported a minimum distance similar to schools, while others said that this is not feasible when day care facilities are located in commercial locations such as strip malls. Some suggested that instead, the restriction should be that cannabis retailers should have to face away from child care facilities.
- ▶ Nearly all potential retailers felt that similar minimum distances between liquor stores and cannabis retailers are not feasible given how many liquor stores operate in Calgary. Most agreed the rule should be that these businesses cannot be co-located, or share a wall.
- ▶ Many retailers were more supportive of having further minimum distances between cannabis retailers in order to ensure that they do not end up being “clustered” in certain areas.

*“I expect that again, it should follow the liquor model. ... 300 metres from schools or high-risk youth centres, 300 metres from another cannabis store.”*

*“I think they should follow same thing they do for Edmonton for liquor laws, with 500 metres from another cannabis retail business. Then you won't get so many in one spot and you limit the licenses being handed out.”*



## Siting Cannabis Producers

*Opponents and non-users tended to agree that cannabis production should be limited to industrial areas, although current users noted that “micro-growing” could change this if it is eventually allowed.*

- ▶ Opponents of legalization were the only group to discuss this issue in great detail. Most agreed that cannabis producers should be restricted to growing plants in areas of Calgary zoned industrial or agricultural. However, many felt that these production facilities are more likely to be built in rural Alberta communities because land is cheaper there than in Calgary.
- ▶ For these participants, their greatest concerns about these facilities are the odours produced and the potential for people to break into them to steal plants. Opponents wanted The City to require producers to take steps to address these concerns, such as by installing filters and enhancing security.
  - ▶ Supportive non-users, meanwhile, tended to be less concerned about these impacts.
- ▶ Some recreational and medical users brought up the future possibility of “micro-growers” being allowed to operate in retail stores as well in smaller locations similar to how craft breweries are allowed to produce and sell beer directly to consumers. Most users welcomed this possibility and did not want The City to be overly restrictive when setting rules governing these potential businesses.

*“Doesn’t it smell if you’re growing it? They would need a large area to grow it.”*

*“People aren’t going to think about breaking into a farm to steal tomatoes, but they might think about breaking into a farm to steal cannabis.”*

## Zoning/Siting Expectations - Producers

*Those involved in production agreed that these facilities should be restricted to industrial and agricultural areas.*

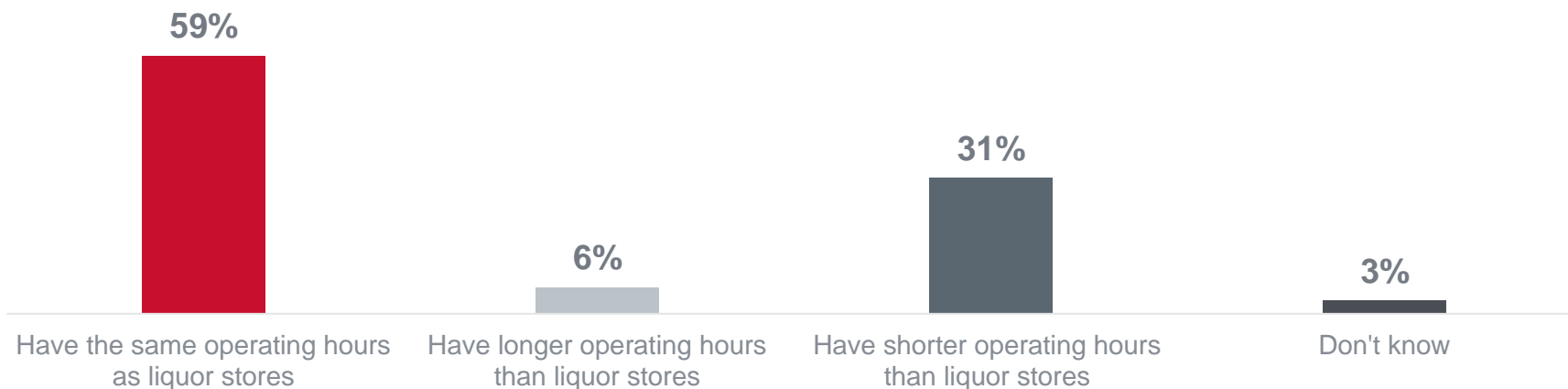
- ▶ Those who are or will be involved in cannabis production expected that these activities should be limited to light industrial and agricultural areas of Calgary.
- ▶ Although most felt that cannabis production is best suited to these types of areas, they did not feel that additional zoning restrictions should be implemented that are beyond what would be expected of other food production facilities, such as greenhouses.
- ▶ Most producers pointed out that not only will they have to meet strict federal and provincial government security requirements to grow cannabis, but that they also plan to proactively mitigate issues such as odour by installing filtration and ventilation systems.

*“The best answer is in a similar manner as dealing with a cultivation business today. Many cultivation businesses today located within Calgary are in industrial areas. On that basis, so would a (cannabis) processing business. There wouldn’t be much of a difference in terms of regulation and oversight of those businesses.”*

*“No real restrictions should be in place for production facilities provided there is no direct residential conflict. There are plenty of industrial and semi-industrial places in Calgary.”*

## Preferred Retail Operating Hours

A majority of Calgarians want cannabis retailers to have the same operating hours as liquor stores.



### Higher among...

- Legalization supporters (73%)
- Infrequent users (78%)
- High-income earners (67% among \$125K+)
- Those in southeast Calgary (66%)

- Frequent users (24%)
- Younger adults (14% of those 18-34)

- Legalization opponents (53%)
- Non-users, never will (46%)
- Those 35-54 (37%) and 55+ (34%)
- Visible minority residents (45%)
- Those in northeast Calgary (36%)

## Operating Hours Expectations - Retailers

*Most potential retailers wanted the same maximum operating hours as liquor stores – although most did not expect to be open late at night.*

- ▶ When asked what the maximum operating hours should be for liquor stores in Calgary, most agreed that the rules should be the same as those for liquor stores (10 am to 2 am), with some also saying that they would support earlier closing hours.
- ▶ In fact, most potential cannabis retailers do not expect to be open late at night, with most indicating that they will close by 8 or 9 pm during the week and 10 pm to midnight on Friday and Saturday. When asked why, most felt that the additional risks and costs associated with being open later (potential break-ins, staff safety concerns) are not worth being able to sell cannabis at a later time of day.

*"I would like to see the same operating hours as liquor stores. It's broad, but will exclude (cannabis) from being available for sale at 2 am."*

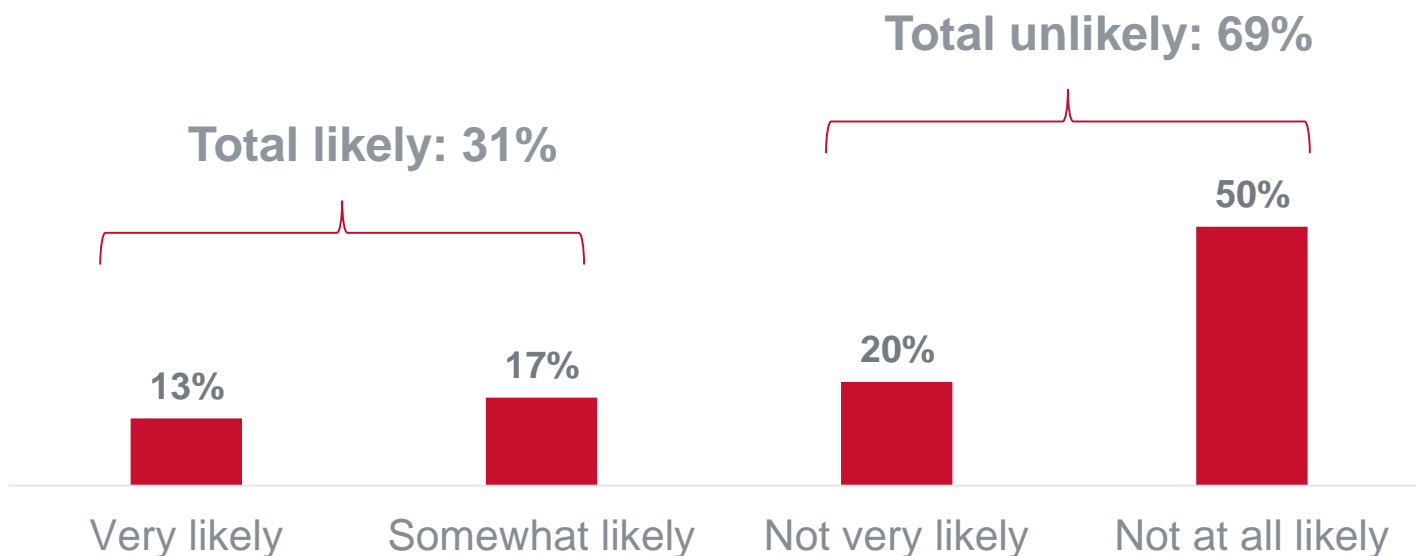
*"It's a personal preference, and it will come down to an economy of scale – mom and pop shops will want to be open all the time, whereas multi-store owners will not want to. Many retailers will want the municipalities to be as broad as possible, but that's maybe not the best idea. Liquor goes from 10 to 2, but if we are trying to eliminate the stigma from a retail perspective, I'm not a fan of late-night hours."*

## Home Growing



## Likelihood of Home Growing

Among current and potential cannabis users (26% of Calgarians), just three-in-ten are likely to try growing their own plants for personal use.



### Likelihood by User Type

Frequent users: 50%

Infrequent users: 29%

Past user willing to try: 20%

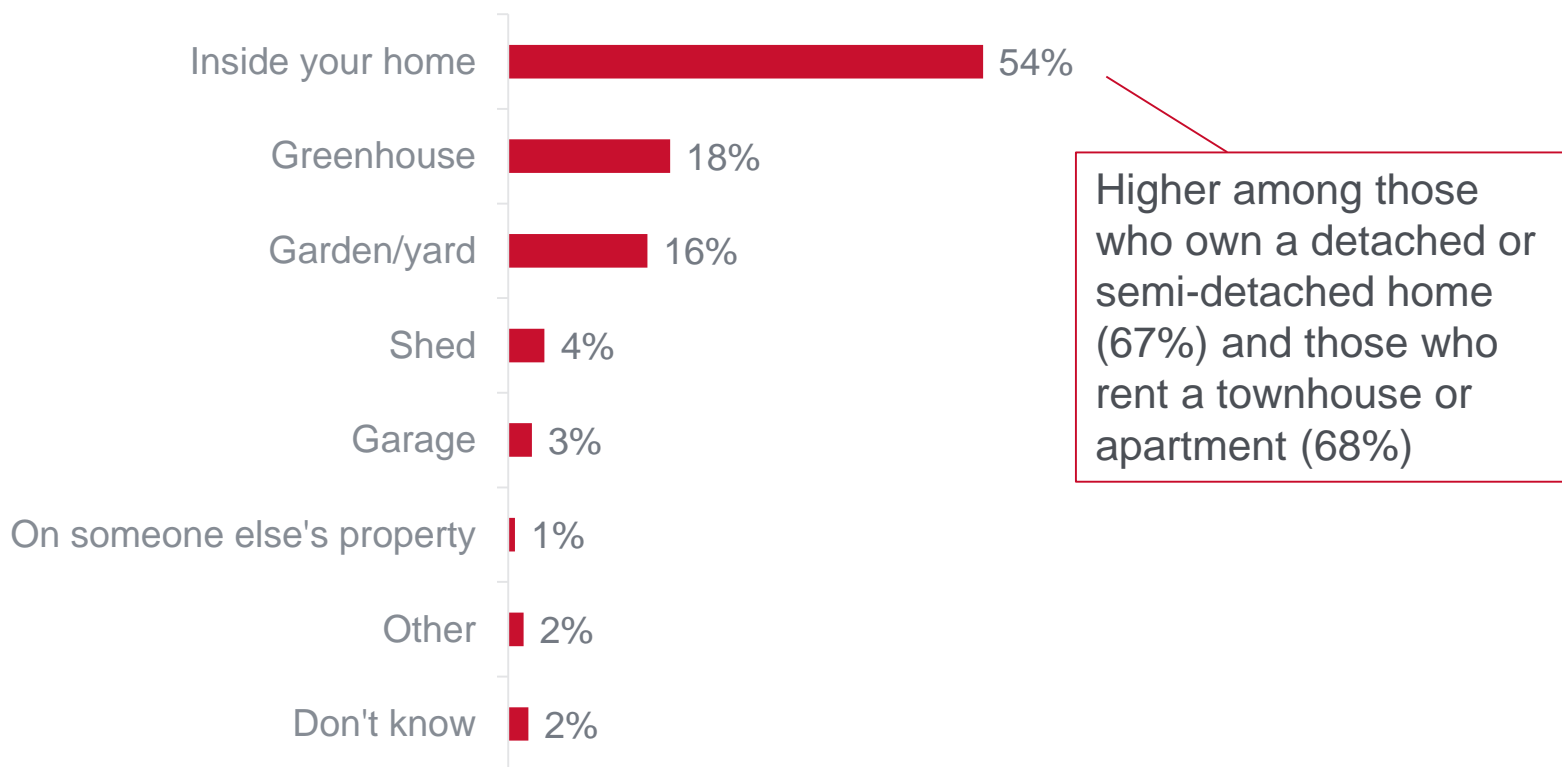
Those earning lower household incomes are also more likely to grow their own plants once it becomes legal to do so.



## Potential Home Growing Locations

More than one-half of likely growers intend to put their plants inside their homes.

% of current/potential cannabis users who are very or somewhat likely to grow plants at home (n=58)\* in these locations



30. Where would you most likely grow cannabis plants?

\*Caution: Small Base

## Expectations Around Home Growing

*Most medical and recreational users said they expect to grow their own plants and plan to do so inside their homes or in a garage.*

- ▶ Most current recreational and medical users in these sessions expected to grow up to four plants for personal use once they can legally do so. Those who said they are not likely to do this tended to be younger users, and attributed the fact that they do not expect to grow cannabis on a lack of knowledge or a lack of desire to attempt this.
- ▶ Most cannabis users who plan to grow plants said they will do this either in a secure building such as a garage, or within their houses. Some said they will grow plants inside because they are more likely to grow better indoors, with some also saying they will be more secure and will not draw unwanted attention.

*"Most people will probably grow a plant to just say they have one, because at the end of the day it is just a plant that you can grow with soil and water."*

*"Does the government come in and check how you are guarding your alcohol bottles from kids? It's a parental issue."*

*"I'd try both. While they grow better inside some of varieties are beautiful plants and would fit with my ornamentals."*

*"I'd be concerned about a cat or dog eating it, but by that concern, should people be growing rhubarb or poinsettias?"*

## Expectations Around Home Growing

*Those who expect to grow their own plants acknowledged they will produce odour that will impact others.*

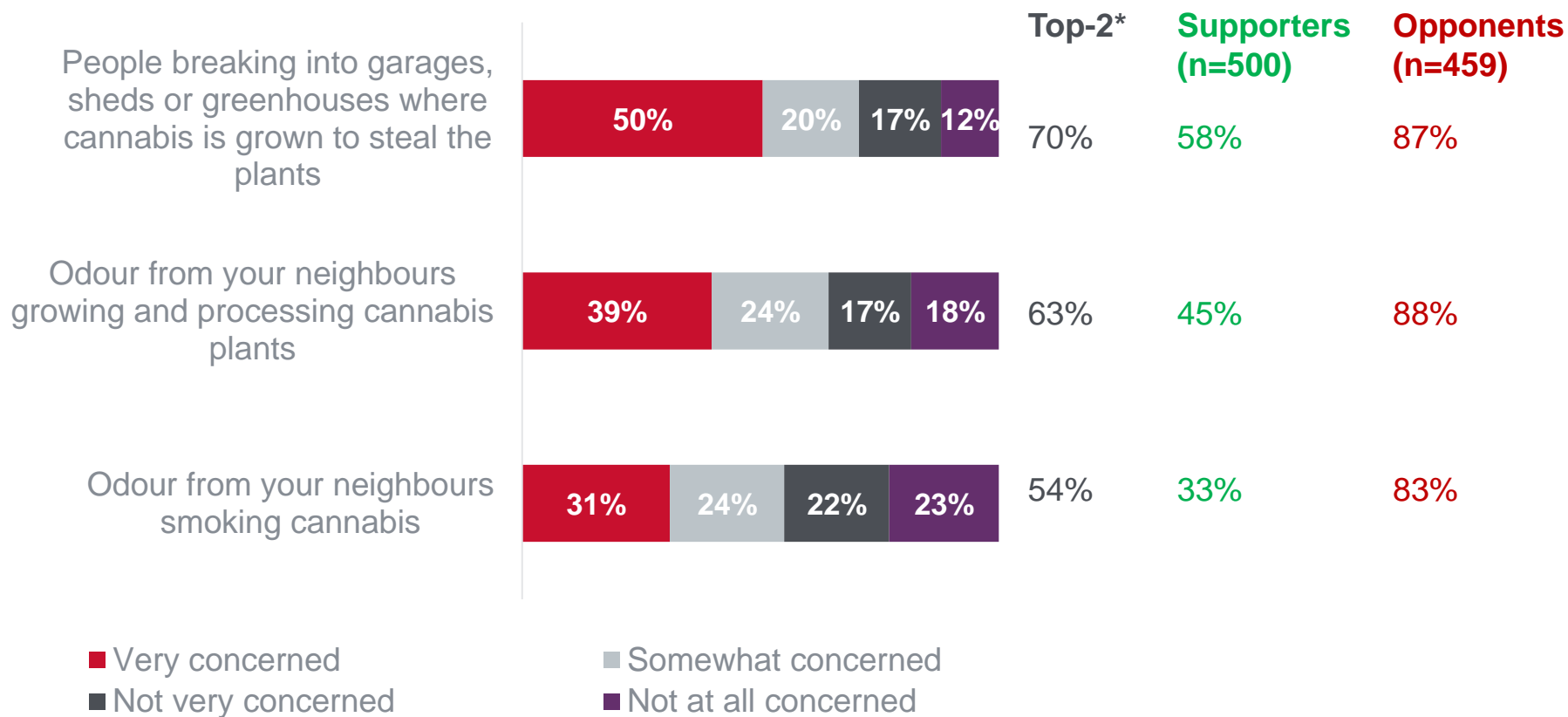
- ▶ Cannabis users acknowledged that a small number of plants will produce a strong odour when they are flowering and that these may be noticeable to neighbours, particularly in multi-family residences. Some said they will try to address this issue by using “grow tents” and other ventilation technology that will remove some of the smell and humidity produced by growing plants.
- ▶ Interestingly, many cannabis users assumed that The City may place very strict rules on home growing, including requiring growers to use ventilation and even inspecting the technology used for this.
- ▶ Some also believed that there will be an outright ban on growing plants in apartments and condominium buildings because of the odour from the plants, as well as the fact they will require additional electricity and water to grow plants. Most were supportive of this since many multi-family residences also do not permit smoking or pets.

*“Inside, when the plant is flowering, you would need a room with a filter and fans otherwise you would smell it, as well as if you had attached rowhouses. Even one fresh female cannabis flower, it’s very strong and you would smell it. In a rental, electricity and water use will increase as well. If you’re not paying for your own utilities, landlords should be able to restrict home grows.”*

*“How landlords regulate it and how government regulates it is different. In my building, a newsletter was sent around about cigarettes and cannabis, and it said just ‘be considerate.’”*

# Concerns Regarding Home Growing

Residents are most likely to be concerned about people breaking into garages and sheds to steal cannabis plants.



31-33 How concerned are you about the following issues where you live? For each, please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about this. (n=1,002)

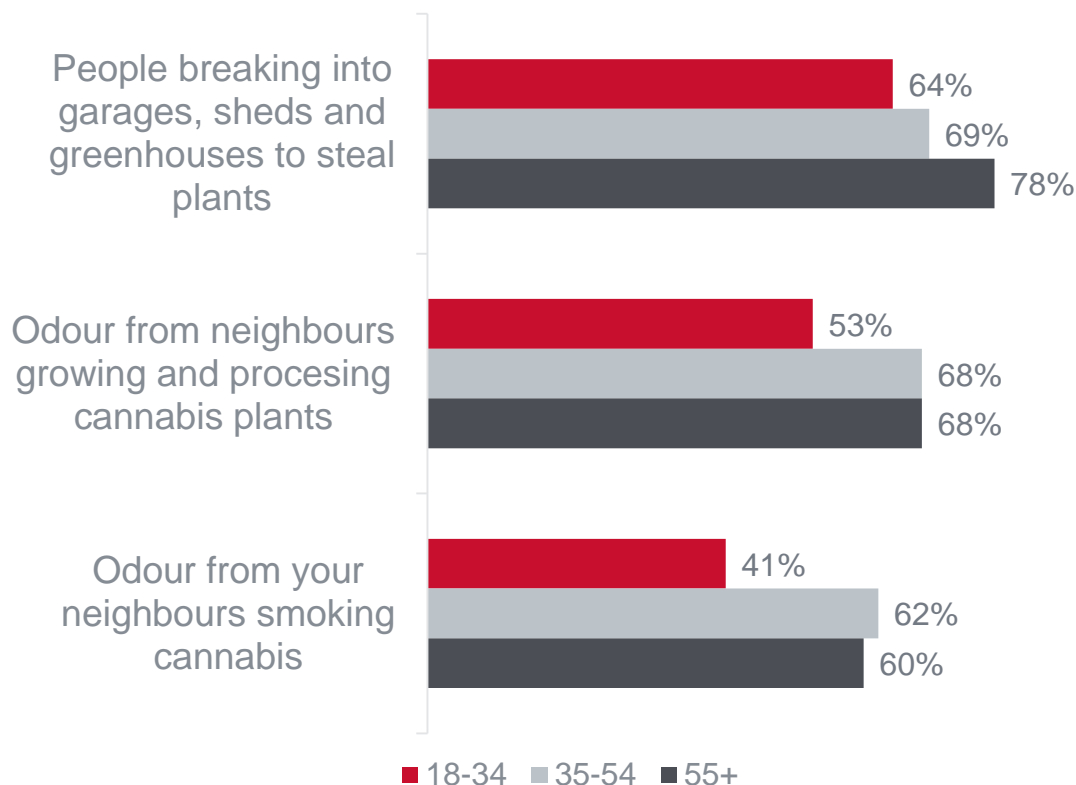
\*Top-2 includes those who are very or somewhat concerned.

Note: DK/NA for each question = 1%

## Concerns Regarding Home Growing: By Age

Younger adults are less likely to be concerned about issues related to home cannabis production and consumption.

% who are very/somewhat concerned about this



Those living in northeast Calgary (77%) and those who identify as a visible minority (81%) are more likely to be concerned about break-ins.

## Concerns Regarding Home Growing

*Odour and potential theft were the main concerns participants expressed about home growing.*

- ▶ Although they knew relatively little about home growing, opponents indicated they are concerned about impacts such as odours, break-ins (particularly by minors) and people growing more plants than they are allowed. Supportive non-users tended to be less concerned about these potential impacts.
- ▶ Cannabis users, meanwhile, did acknowledge that both odour and break-ins are a possibility, although some users were dismissive of this as they felt minors will be more likely to access cannabis through retail stores and will not resort to stealing plants from neighbours.

*“People growing at home might try to sell it, and then you’re going to get people breaking into their garages.”*

*“As long as there are certain safety regulations in place, like you are using certain lamps, and you have ventilation, and things aren’t against something flammable, then I’m okay with (home growing).”*



## Concerns Regarding Home Growing

*Most participants expressed support for a complaint-based system to resolve issues, with several also saying that public education will be required to inform residents about home growing.*

- ▶ When asked to describe how they expect The City to deal with complaints from neighbours regarding home growing, opponents, non-users and even some users were supportive of a complaint-based system where people could complain to The City just as they would about noise.
- ▶ Many felt that bylaw officers would have to have a fair bit of leeway to deal with these complaints, with several participants (especially users) saying that neighbours will simply have to get used to the smell of cannabis.
  - ▶ A few participants also advocated for a “mediation” approach where the bylaw officers try to get neighbours to resolve their issue on their own.
- ▶ Participants in most groups agreed that a significant amount of public education will be required to inform residents about home growing, including how many plants are allowed and what to do about any issues or problems that arise.

*“It should be based around complaints, like if you haven’t cleared your sidewalk for snow. If somebody calls, a bylaw officer will come by.”*

*“The City should be more focused on educating people instead of calling bylaw officers.”*

## Enforcement, Taxation and Regulation



## Views on the Cost of Enforcement

*Opponents and non-users recognized The City will incur additional enforcement costs, with recreational and medical users expecting enforcement to decrease once legalization occurs.*

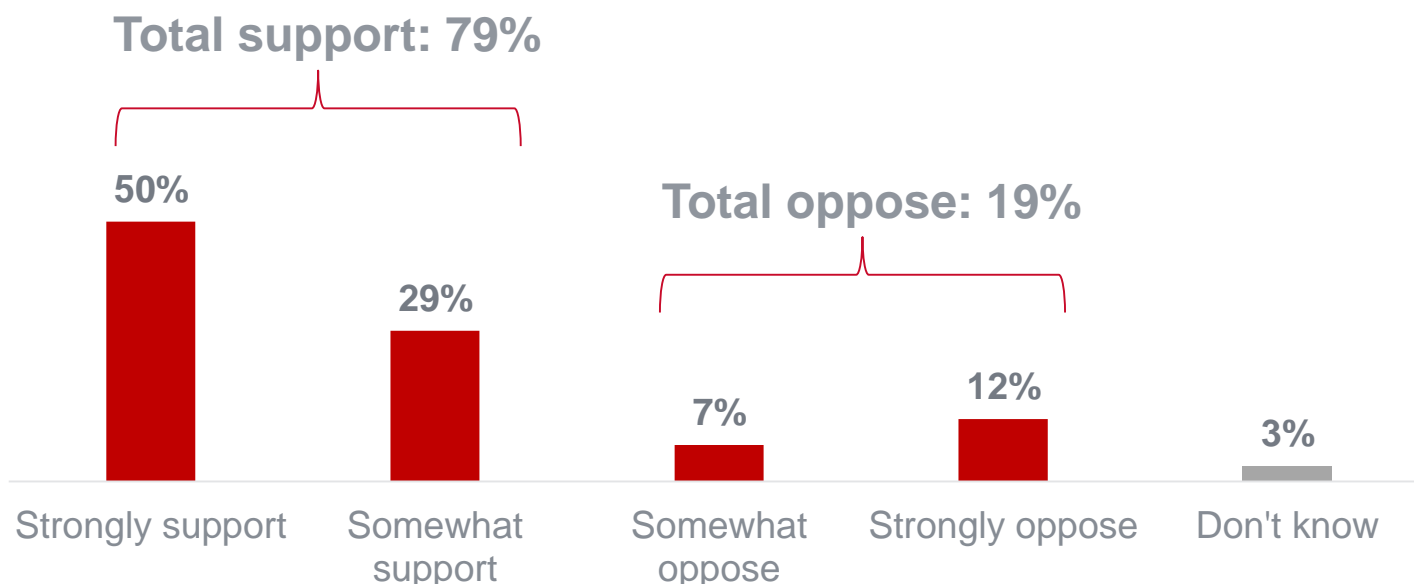
- ▶ Opponents and non-users agreed that The City of Calgary will have to incur extra costs to enforce and educate the public about new rules around cannabis consumption, although most did not have a clear notion of the exact costs for this.
- ▶ Recreational and medical users, on the other hand, strongly rejected this idea, as they felt that The City's costs will actually decrease as police, especially, no longer have to enforce laws related to cannabis being illegal. Here again, however, most of these users hoped (if not necessarily expected) that The City will not create many more rules governing public consumption and home growing.

*"There will be expenses incurred by municipalities when they are enforcing the new rules, and The City needs to educate people like me, because if they put in new bylaws I probably won't know what they are."*

*"Calgary's always been heavy-handed when it comes to marijuana. If there's information that will keep me out of trouble, I want to be able to find it."*

## Support For Sharing Provincial Tax Revenue

Most Calgarians want the provincial government to share a portion of the federal cannabis tax with municipalities.

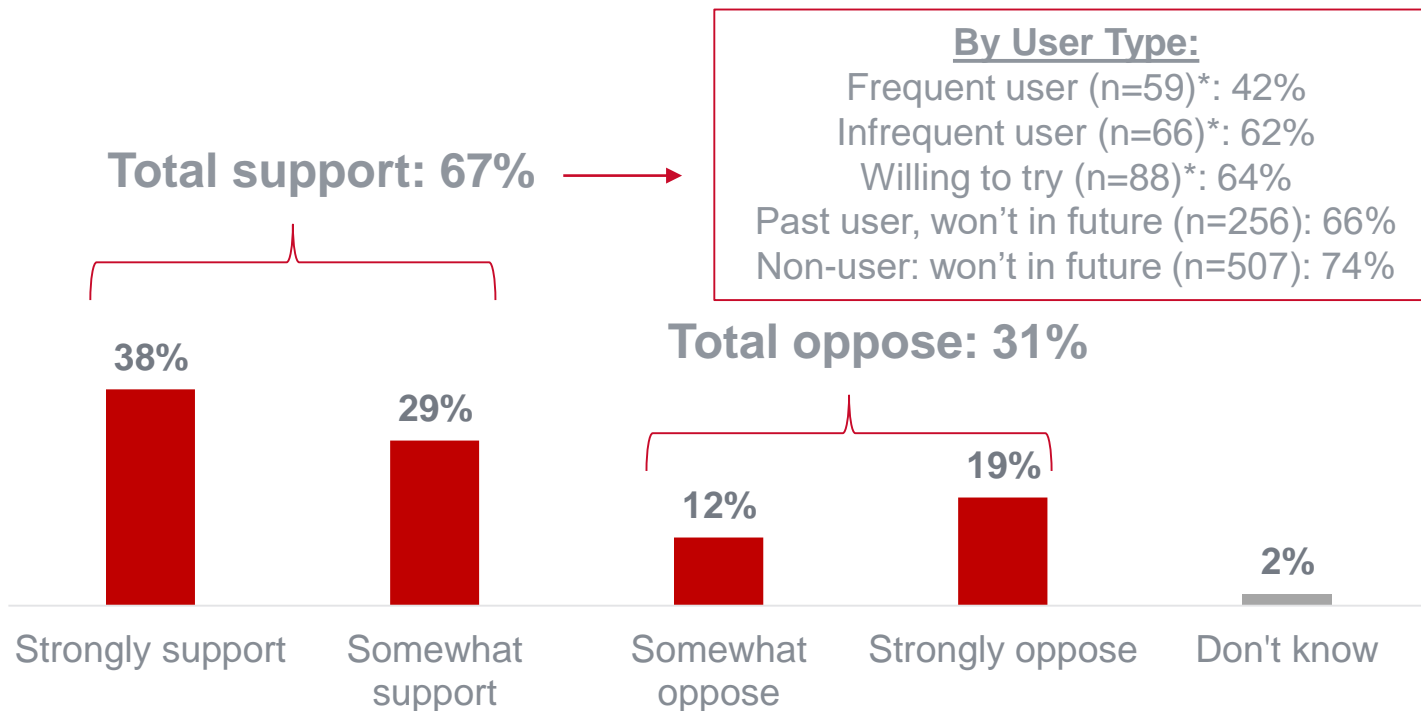


Support for the provincial government sharing revenue with municipalities is higher among those earning higher household incomes (84% among those earning \$125K+ vs. 72% among those earning <\$50K).

42. The federal government has proposed taxing cannabis and sharing 50 percent of the proceeds with provincial governments. One idea is for the provincial government to share a portion of this tax with municipalities to help them cover the costs associated with legalizing cannabis, which include enforcement and licensing businesses. Do you support or oppose this idea? (And is that strongly or somewhat?) (n=1,002)

# Support For Municipal Cannabis Tax

Two-thirds of Calgarians support the idea of a municipal tax on cannabis sales to fund regulation and enforcement.



Opposition to a municipal cannabis tax in Calgary is slightly higher among supporters of legalization (35%), as well as those earning lower incomes (38% among <\$50K), older adults (36% of those 55+) and those with a disability (42%).

43. Another idea is for the Alberta government to give the City of Calgary the power to introduce its own municipal tax on cannabis. The money raised from this tax would go towards regulating and enforcing the new laws related to legalization. (n=1,002)

\*Caution: Small Base

## Revenue Sharing and Taxation

*Although there was support for The City receiving a higher share of cannabis revenues, most rejected the idea of a municipal retail cannabis tax to cover The City's enforcement costs.*

- ▶ Non-users and opponents tended to be supportive of the idea of the Alberta government sharing up to one-third of the taxes charged on cannabis with The City to support additional enforcement. Recreational users were somewhat supportive of this idea, although some felt that The City does not require up to one-third of the revenue to cover its costs.
- ▶ In all groups, participants rejected the idea of a separate City tax on cannabis. The key arguments expressed against this were that it will make cannabis too expensive (and drive people back to the black market) and that users will purchase cannabis in neighbouring communities.

*"If there is an expense incurred by The City, some of the money in the tax should go to The City. I know the federal and provincial governments will get some of the tax. It should go to where the expenses are."*

*"The higher the cost of cannabis, the more black market activity there will be"*



## Retail “Vetting” Expectations

*Potential retailers were split between those who want stringent criteria in place to assess retail applications, and those who want a first-come, first-served basis used to evaluate applicants.*

- ▶ Retailers offered a range of views regarding how The City should approve licenses to retail cannabis, with some arguing strongly in favour of a merit-based system and others favouring a “first come, first served” approach that is open to all potential applicants.
- ▶ Some potential retailers argued very strongly in favour of stringent criteria to be used to vet retailers, with a great deal of emphasis on ensuring that retailers do not have a criminal background. These retailers expressed concerns about allowing those who have been selling cannabis illegally to gain a foothold in the legal retail industry.
  - ▶ Other criteria that were suggested included examining the applicant’s business plan, as well as measures of its potential viability, such as access to capital.

*“There should be an application process, they need to know who will be doing this business. It will be beneficial to have an application process based on knowledge, information, criminal record checks”*

*“Companies should have financial requirements, a big enough team and infrastructure for disaster recovery and should have mandatory systems. Also education of staff, quality control standards, background checks. The license should be non-transferrable and companies should not be able to sell their shops to another company.”*

## Retail “Vetting” Expectations

*Many potential retailers expressed the view that they do not want The City to duplicate the vetting processes used by the AGLC.*

- ▶ Others felt that The City should ensure that smaller operators have an opportunity to open stores, and that the bar to entry should not be limited to highly-capitalized businesses. Many of these retailers said that “mom and pop” cannabis retailers should have the same opportunities as larger and more sophisticated ventures.
- ▶ Many participants also said that The City’s process for vetting retailers should not duplicate the process these businesses will have to go through in order to obtain a license from the AGLC to sell cannabis.

*“There are a lot of big players coming in to the market and we really hope that the small or local players will be given a chance. We have a lot to offer. Foreign stores are setting up and marking their turf. We hope The City sees the value in small local retailers trying to set up and do well here in the city and for the city.”*

*“I believe they should have little to no (vetting) in place because the province will be doing serious vetting. Why put people through the ringer twice? Calgary loves being business-friendly, so if you get a provincial license, you should essentially not have to fulfill additional requirements.”*

## Advice For Regulating Producers

*Those involved in production advocated for The City to treat cannabis producers as they would other food or beverage production facilities.*

- ▶ When asked to provide a final piece of advice to The City of Calgary on how to regulate producers, those involved in this aspect of the cannabis business said that the City should avoid being overly “onerous” and duplicating any other requirements related to security that have been put in place by the federal and provincial governments.
- ▶ Others said that The City should not be any more restrictive on these types of businesses than they would be of a commercial greenhouse or food or beverage production facility.
- ▶ Some said that the main thing The City needs to focus on are the impacts of these facilities on the surrounding area, including noise (mainly from ventilation systems), lighting and odours.
- ▶ A couple of others with views regarding production indicated that The City needs to be mindful of the fact that in the future, microgrowers and microprocessors may wish to open in commercial areas of the City, and that these should be treated in a similar fashion to craft breweries.

*“Many cultivation businesses today located within Calgary are in industrial areas. There wouldn’t be much of a difference in terms of regulation and oversight of those businesses.”*

*“Noise emissions, odour and light are primary considerations too. Greenhouses emit a lot of light at nighttime and it can be like living next to stadium lights.”*

*“They should know who is running the company – make sure the officers and directors are good citizens and not affiliated with organized crime. Health Canada does a lot of this already in order (for producers) to be able to get the license to build in the first place.”*

## Advice For Regulating Retailers

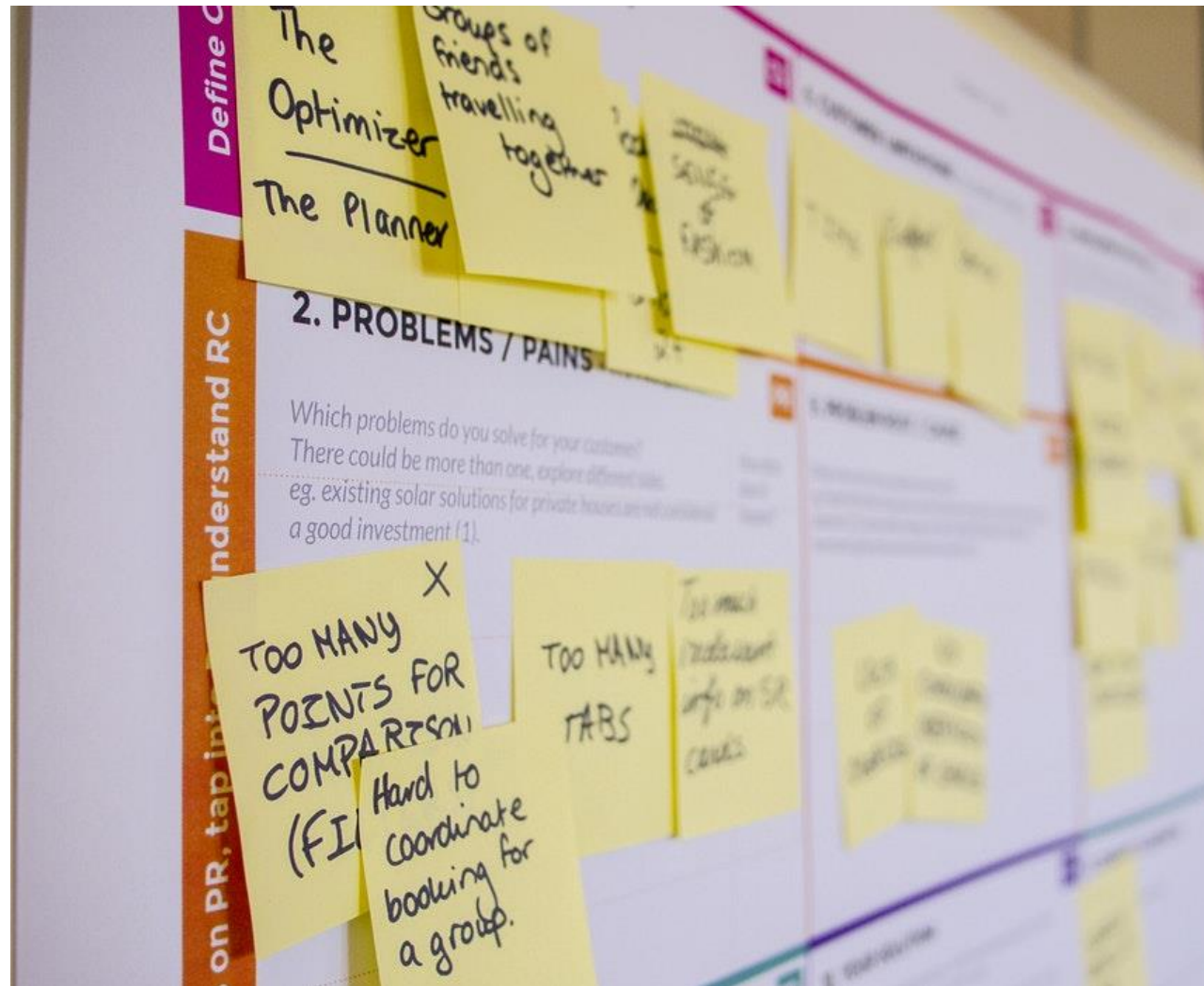
*Most potential retailers want The City to treat cannabis retailers just as they would liquor stores, with some indicating that more focus needs to be placed on product security and the aesthetics of the stores themselves.*

- ▶ Most potential retailers, like potential producers, advocated for The City to treat the licensing and operation of cannabis retailers just as they would liquor stores or other commercial businesses. Again, several said that The City's process for vetting retailers should not duplicate the process that these businesses will have to follow when obtaining their license from the AGLC to sell cannabis.
- ▶ Some business representatives did indicate that The City should focus less on issues such as minimum distances and more on the security and aesthetic standards for these businesses. These key informants explained that The City needs to ensure that these businesses meet certain standards in terms of securing products, as well as monitor the products sold within the store to ensure that illicit producers are not selling black market cannabis in legal storefronts.
- ▶ Another related consideration raised by some key informants was to ensure that these businesses meet certain aesthetic standards, particularly related to signage and language used to promote the store's products. These potential retailers indicated that in order to reduce public stigma from cannabis, The City needs to ensure that these stores do not look "seedy" or unsafe to people in the area.

*"Many people out there are concerned about where marijuana is sold as opposed to how. That should be a bigger concern: what are the proper tracking protocols?"*

*"Just whatever the process is for a liquor store – including security clearance. The regulations for liquor are in place and are pretty clear cut – just use the same process/criteria. There's no need to re-invent the wheel."*

## Public Input and Education



## Public Input – Approaches/Expectations

*Most potential producers and retailers have not engaged in extensive public consultation at this point, but said they expect to follow a process comparable to that used when liquor stores open in Calgary.*

- ▶ Most retailers have not engaged in a significant degree of public consultation in Calgary to date. Those that have related businesses already in place, such as cannabis counselling clinics, have provided some information about what they do to commercial neighbours, while a couple are also meeting with nearby community associations. However, most expect that they will begin engaging neighbours in earnest once they have signed leases and have their business applications in place.
- ▶ Most producers who were interviewed, meanwhile, said they have already engaged in this process in the communities where they located their operations. This mainly involved seeking approval from the local municipality and in some cases, holding educational sessions/open houses with the community.
- ▶ When asked what they expect The City to require in terms of public input/engagement, most said that the process for seeking public input on cannabis retail stores and production facilities should mirror the process used to approve businesses obtaining a liquor license.

*“Our plan has been to talk to the landlord and owner of the commercial space and see how they feel. They have a stake in the community because they own the land or control property, so initially we would talk to them and if they feel they want to move forward, we would follow up with questions to see if they know people in the surrounding areas and find out how they feel.”*

*“I would 100% agree with the AGLC process used for liquor stores. People have a chance to vote or voice concerns. ... We want to work with the community and landlords as opposed to saying “We’re coming, here we are – too bad.” If they voice a concern, it’s probably a good thing to hear it out.”*



## Interaction With The City

*Most producers and retailers were very satisfied with the City's engagement process, but are anxious to begin dealing with the City more directly on the zoning and business application process.*

- ▶ Most producers and retailers have only engaged with the City of Calgary directly through its public engagement process. Some have already spoken directly to licensing and planning officials, but these discussions have not progressed very far and are not expected to do so until regulations are approved.
- ▶ Both producers and retailers were quite satisfied with how the City has engaged them, even though they expressed frustration at the length of time it is taking to finalize the process for applying for retail licenses. At the same time, however, many praised Calgary for being relatively “proactive” compared to other municipal and provincial governments that are also dealing with this issue.

**SATISFACTION WITH THE CITY OF CALGARY ENGAGEMENT PROCESS**

	Retailers (n=21)	Production/Both (n=4)	Other (n=5)	TOTAL
Very satisfied	11	3	4	18
Somewhat satisfied	9	1	1	11
Somewhat dissatisfied	1	-	-	1
Very dissatisfied	-	-	-	-

## Public Education Activities/Expectations

*Most potential retailers expected to engage in their own product-related public education by providing customer information about different strains/types of cannabis and their effects.*

- ▶ Most of those planning to enter the cannabis business expected to be heavily involved in offering customers their own forms of public education. Nearly all of those involved in retail said they plan to extensively educate consumers about the different strains of cannabis and cannabis products, as well as their different effects. Many were very enthusiastic about the opportunity to provide this degree of education about a new product and to de-stigmatize cannabis in the eyes of some potential customers.
- ▶ As part of this, these potential retailers said they plan to do a great deal to educate new users in a similar fashion to how product consultants at liquor stores educate customers about different types of wine, beer and liquor. Most plan to do this via their own product consultants (“budtenders”) as well as in-store signage and take-home materials.

*“We have a number of educational videos we’ve invested in that we will have available both within stores and certainly to customers ... Ideally we want to have a portal for them to go in where they can learn about strains, dosing, conditions, safe consumption, and things like that.”*

*“Our bud-tenders will talk about health benefits and what (cannabis) is, because a lot of the market is canna-curious and people are open to trying it. Having (that) in store will be our unique business proposition.”*

## Public Education Activities/Expectations

*Most potential retailers said they would be in favour of providing any public education materials produced by The City of Calgary to their customers.*

- ▶ When asked about their expectations for The City's public education efforts, most said they would be very supportive of any initiative and would want to provide any materials The City wants to distribute to retail customers.
- ▶ These key informants also said they were quite supportive of other potential public education campaigns related to the health impacts of cannabis, as well as campaigns intended to discourage people from driving under the influence of cannabis.
  - ▶ At the same time, some said that The City's public education materials should not duplicate messaging provided by other levels of government, those involved in cannabis production and retail, and other groups.

*"I think there should be a campaign of sorts. I'm not sure of the form, but certainly there should be public information available via 311 and operators there who should be able to explain information about the industry. Maybe put some of that stuff on The City's website too."*

*"Partnering with Alberta Health and retailers could allow for social media campaigns and The City can be a part of this. If we were a retailer, we would work with the City, but on initiatives that were more province-wide and The City would be a part of it."*

## Public Education - Messaging

*Participants expected The City to play a key role in educating people about what is and is not allowed regarding public consumption and home growing.*

- ▶ In all groups, participants agreed that a significant level of public education will be required to ensure Calgarians know what the new rules are regarding public consumption and home growing.
- ▶ Most expected that The City will be conducting these activities alongside public education campaigns by the federal and provincial governments, as well as organizations like MADD, that discourage people from driving while under the influence.

*"It has to be loud and clear what is allowed and what isn't allowed. The safety issue with driving and health implications need to be covered."*

*"They should let people know what actions are legal and not. If someone's smoking in a park, that might be okay, but if someone's lighting up at a red light, then you should phone the police. They should break that down."*

## Public Education - Messaging

*Participants were most likely to suggest that The City's key message should simply outline the rules, or that they should encourage cannabis users to be considerate of others.*

- ▣ Participants worked in groups of two or three to develop what they thought is the most important message The City of Calgary should deliver when it comes to cannabis use. Generally, these fell into three categories:
  - ▣ Several participants across all five groups stated that The City needs to very clearly explain the new rules regarding public consumption and home growing, doing so in three or four key points and then encouraging people to learn more by visiting The City's website. Many of these participants compared this type of message to The City's recent public education campaign on recycling.
  - ▣ In the opponent and non-user groups, some participants felt that The City's message needs to encourage people to be "courteous" and "considerate" when consuming cannabis in public.
  - ▣ Many recreational and medical users felt that The City should focus on "de-stigmatizing" cannabis as part of a broader effort to make people aware that it is now a legal substance with medicinal properties.

*"You have to be mindful of how it affects other people, like alcohol, and that it doesn't infringe on other people's rights. How it's consumed, where it's consumed, driving while impaired, smoking on the streets."*

*"It should be simple and straightforward. It has to be clear what is permitted and what is not."*

## Public Education - Channels

*Participants were most likely to identify social media, outdoor advertising and mailouts as the most effective ways to reach people.*

- ▶ When asked to identify the key channels The City should use to get out this message, participants in all groups tended to highlight a few key methods:
  - ▶ **Online/Social media:** Many participants in all groups felt online and social channels (including Facebook, Instagram, YouTube “pre-roll” ads and Google Ads) will be the most effective manner of providing the message in a very brief form, with the ads driving people to The City website for more information. Many recalled recent examples of The City advertising on these platforms.
  - ▶ **Outdoor advertising:** In all groups, participants suggested using billboards and ads on public transit vehicles to provide this information, with people encouraged to go to The City’s website to learn more.
  - ▶ **Mailouts/flyers:** In most groups, participants suggested sending a mailout to all households (either a stand-alone piece or in water/tax bills) informing them about the new rules, with those who rent more likely to suggest flyers or free distribution newspapers like Metro in order to reach those who do not regularly receive mail from The City.
- ▶ Cannabis users, in particular, felt that if these advertisements specifically reference cannabis, it will get their attention because this is of interest to them.
- ▶ In all groups, participants supported the idea of The City communicating in the coming weeks/months that the rules will be finalized soon.





## Conclusions



## Conclusions

- The results of this survey show that most Calgary residents broadly accept most potential municipal regulations governing how cannabis is sold and consumed after the federal government legalizes cannabis in July 2018. Most Calgarians – including those who support legalization – believe that rules around public consumption of cannabis should at least mirror The City of Calgary’s existing public smoking bylaw and provincial liquor consumption rules. Most Calgarians agree that it is unacceptable to consume cannabis in public spaces, including parks, streets, licensed patios and transit shelters.
  - However, this research also confirms that recreational and medical cannabis users are more likely to desire (if not necessarily expect) that they will have significantly more freedom to consume cannabis in public. Managing these expectations among cannabis users, while at the same time addressing concerns among non-users regarding potential negative impacts of cannabis legalization (second-hand smoke/odour, impaired driving...) will be The City’s key challenge.
- When it comes to enforcement, Calgarians are split between those who believe that police and bylaw enforcement officers must enforce these rules to the letter of the law, and those who feel there is room for law enforcement officials to use their own discretion. Not surprisingly, this fault line in public opinion largely comes down to how people feel about the idea of legalization, with opponents wanting strict enforcement and supporters more comfortable with giving law enforcement some degree of discretion.
  - Based on focus group discussions with cannabis users, social pressures appeared to be a greater deterrent to using cannabis in a public place than the actual content of public consumption laws, or the possibility of these rules being enforced to a greater degree by police and bylaw enforcement officers. Therefore, The City of Calgary may want to consider adopting messaging for a public education campaign that is framed around being “considerate” of others when consuming cannabis in public.
- There is also a strong consensus that cannabis retailers need to be placed a significant distance from schools and playgrounds. When it comes to other potential restrictions on retail operations, such as minimum distances from liquor stores and other cannabis stores, Calgarians’ views are more mixed, with even opponents of legalization not significantly concerned about liquor and cannabis retailers being located close to one another.

## Conclusions - Continued

- Although residents are somewhat split on whether the City needs to hire additional police and bylaw enforcement officers to regulate cannabis consumption, most residents agree The City of Calgary should receive additional revenues to deal with this issue. Calgarians are more likely to want The City to receive a share of provincial cannabis tax revenues than to have the power to enact its own municipal cannabis tax.
- Many different actors will be involved in educating the public about various aspects of cannabis legalization leading up to and following July 1, with potential retailers expecting to be mainly focused on providing product knowledge to their customers, and other levels of government and organizations such as MADD likely to focus on issues such as impaired driving and the health effects of cannabis.
  - There was also a great deal of openness among potential retailers to helping The City deliver these public education messages to their customers, which represents another opportunity (in addition to The City using other channels, such as social media and outdoor advertising) to deliver important messages about cannabis-related rules and expectations to Calgary residents.
- Cannabis will be a heavily regulated industry, and those involved in production and retail said they have every expectation that they will have to meet stringent criteria from all three levels of government in order to grow and/or sell their product.
  - At the same time, however, these organizations emphasized that they hope The City avoids duplicating other regulatory processes (for example, those used by Health Canada and the AGLC to review production and retail applications) when evaluating proposals to open production facilities and retail stores. Their expectation was that the process should be no more onerous than those used for comparable types of regulated businesses, including food and beverage production (for producers) and liquor stores (for retailers).

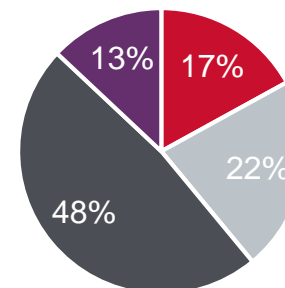


## Appendix: Segmentation

# Segmentation Results

## Segment Dimensions:

- Support for legalization
- Views on cannabis retailers in neighbourhood
- Concern regarding neighbourhood cannabis use
- Preference for regulatory framework/enforcement
- Social Values



- Anti-Cannabis Absolutists
- Out of Sight, Out of Mind
- THC Tolerant
- Cannabis Champions

Anti-Cannabis Absolutists	Out of Sight, Out of Mind	THC Tolerant	Cannabis Champions
<ul style="list-style-type: none"> <li>• Have not (and never will) use cannabis; very opposed to legalization</li> <li>• Likely to have a zero-tolerance approach for its use</li> <li>• More likely than others to be very concerned about neighbourhood impacts and living near retail operations</li> </ul>	<ul style="list-style-type: none"> <li>• Low support for legalization</li> <li>• Only tolerant of private use of cannabis; not likely to be in favour of consumption in public places.</li> <li>• Not keen to have cannabis retailers located in their neighbourhoods</li> <li>• Very concerned about neighbourhood impacts</li> </ul>	<ul style="list-style-type: none"> <li>• “Soft” support for legalization</li> <li>• Accepting of some public use (such as at festivals) but less supportive of public consumption</li> <li>• Somewhat supportive of retailers, but want to see restrictions on where these are located.</li> <li>• Somewhat concerned about neighbourhood impacts</li> </ul>	<ul style="list-style-type: none"> <li>• Major users of cannabis</li> <li>• Prefer lax rules on public consumption and regulation</li> <li>• Least likely to be concerned about neighbourhood impacts of cannabis</li> </ul>



# Anti-Cannabis Absolutists

## Demographics

- Skews slightly more female than male (59% vs. 41%)
- Skews slightly older than average (33% 55+ and 49% 35-54)
- Slightly higher proportions of residents who are retired (22%), who stay at home full-time (10%) and who are unemployed (10%)
- Highest proportion of homeowners of all segments (88%, including 80% who live in single-family detached homes)
- Highest proportion with children under 18 in the household (41%)
- Slightly lower household incomes (21% earn less than \$50,000/year)
- Higher proportion living in northeast Calgary (25%)

## Social Values

- Most likely to be deferential to authority
- Least likely to seek personal escape
- Low penchant for risk
- Lower-than-average pursuit of intensity

## Usage/attitudes regarding legal cannabis

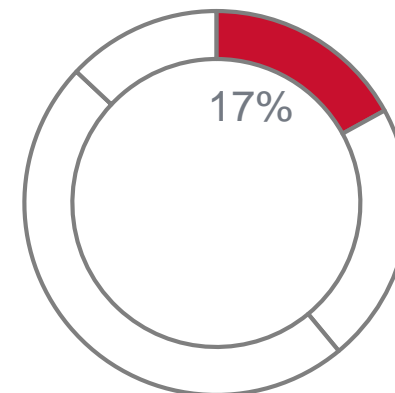
- Much less likely to have consumed cannabis at some point (18%); virtually none (only 1%) expect to use cannabis once it becomes legal.
- Deeply opposed to legalization (89%, including 79% who strongly oppose).

## Cannabis Retail and Production

- Firmly opposed to all forms of cannabis production and retail near where they live.
- Most likely to be in favour of restricting where commercial operations can be located (87% oppose no restrictions on retailers).
- Higher-than-average support for keeping cannabis retailers further away from liquor stores and one another.
- Most likely to favour shorter operating hours for cannabis retailers (66%).

## Views regarding public consumption/home growing

- Members of this segment do not tolerate any public consumption of cannabis; strong majorities also believe cannabis should not be used on private property, such as in someone's backyard (89% unacceptable) and on a front porch (96% unacceptable).
- More likely to support consumption restrictions that are firmer than the City's smoking bylaw (90%) and liquor laws (71%).
- Very likely to be very concerned about odours from cannabis and people stealing plants.



# Out of Sight, Out of Mind

## Demographics

- Evenly split between men and women (51% vs 49% respectively)
- Skews slightly older (36% age 55+ and 34% 45-54)
- Includes both a high proportion of retirees (21%) and those working full-time (49%)
- Slightly higher household incomes (24% earn \$150K+/year)
- Slightly higher than average proportion own their homes (80%), with seven-in-ten owning a detached home (71%) and one-in-ten owning a semi-detached house (10%).
- Highest proportion of visible minority residents (16%)
- Highest proportion in northwest Calgary (29%)

## Social Values

- Least likely to support active government
- Slightly higher than average on rejection of authority and personal challenge
- Higher than average on discriminating consumerism

## Usage/attitudes regarding legal cannabis

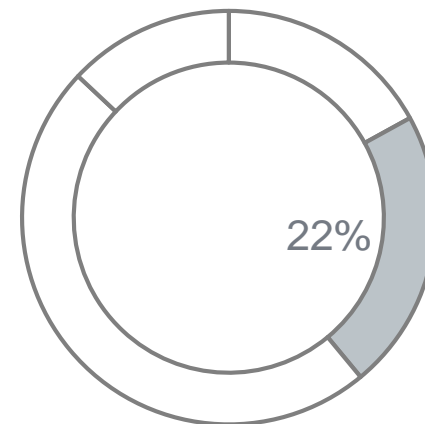
- One in three (33%) have consumed cannabis at some point; just three percent currently use cannabis and only four percent of past users would consider trying again.
- Only one-quarter support legalization, with seven-in-ten opposed (27% vs. 71% respectively).

## Cannabis Retail and Production

- Only two-in-ten support a public or private retailer in their neighbourhoods (22% and 20% respectively); one-in-ten (12%) would welcome a cannabis grower near where they live.
- Most likely to support limiting growers to industrial parts of the city (87%).
- Strong support for siting restrictions, particularly keeping retailers from vulnerable populations (79% support).

## Views regarding public consumption/home growing

- Members of the Out of Sight, Out of Mind segment are significantly more tolerant than Anti-Cannabis Absolutists towards cannabis use on private property. Most, however, firmly believe that it is unacceptable to consume cannabis in public places.
- Majorities of this segment believe that public consumption rules should be more strict than The City's smoking bylaw (62%) and provincial liquor laws (52%).
- Members of this segment are also very likely to express concerns about odour from neighbours smoking cannabis or processing plants, as well as to worry about people stealing plants.



# THC Tolerant

## Demographics

- Skews slightly female (54% vs. 46% male)
- Skews slightly younger (37% age 18-34)
- Slightly higher proportion of students (10%) and those in the workforce (49% work full-time, 9% work part-time and 12% are self-employed)
- Average levels of household income
- Average home ownership
- Slightly higher proportions in southeast Calgary (25%).

## Social Values

- Average in most respects; slightly more likely to have a penchant for risk

## Usage/attitudes regarding legal cannabis

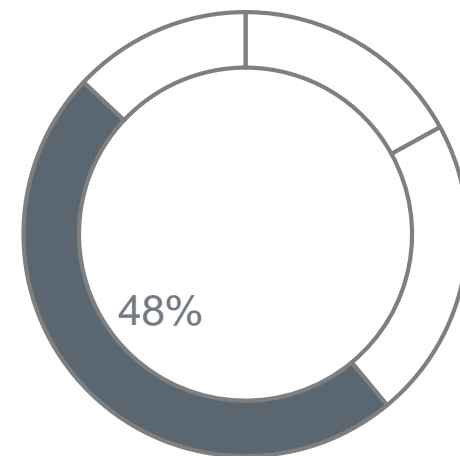
- Slightly more than half (55%) have consumed cannabis at some point, including nearly three-in-ten (28%) who currently use.
- Only one-in-five non-users (18%) expect to use cannabis again once it becomes legal, with these potential users most likely to smoke cannabis or consume edibles.
- Three-quarters support legalization (74%, including 33% who strongly support and 40% who somewhat support).

## Cannabis Retail and Production

- More than six-in-ten support having a cannabis retailer in their neighbourhoods, but much of this support is soft. Members of this segment are less enthusiastic about having a cannabis grower near where they live (only 45% support).
- Two-thirds (68%) support cannabis retailers operating in any commercial area, but are relatively split in their views on establishing minimum distances between cannabis retailers and liquor stores, as well as between cannabis retailers. Members of this segment agree, however, that retailers should be kept a set distance from schools and vulnerable populations.

## Views regarding public consumption/home growing

- Virtually all members of the THC Tolerant segment believe it is acceptable to consume cannabis on private property. Six-in-ten (60%) accept consumption at outdoor festivals/events, with most preferring to have consumption take place in designated areas. Between one-in-ten and one-quarter find it acceptable to consume cannabis in other public places, such as parks, licensed patios and on the street.
- Most members of this segment believe that consumption rules should mirror existing laws related to tobacco and alcohol consumption.
- Members of this segment tend to be less concerned about cannabis-related odours in their neighbourhoods, but two-thirds (66%) do worry about people breaking into neighbouring properties to steal plants.





# Cannabis Champions

## Demographics

- Skews male (68% vs. 32% female)
- Skews very young (59% under the age of 35, including 13% age 18-24)
- Higher proportion of those working full-time (52%) and in school (9%)
- Highest proportion of renters (31%); most likely to live in an apartment or condo (19%)
- Least likely to have children in the household (just 24%)
- Slightly higher proportion have a disability (13%)
- More likely to live in the northwest (34%) and southwest (31%)

## Social Values

- Most likely to reject authority
- Most likely to have a need for personal escape
- High penchant for risk and higher-than-average in seeking personal challenges
- Most likely to support active government

## Usage/attitudes regarding legal cannabis

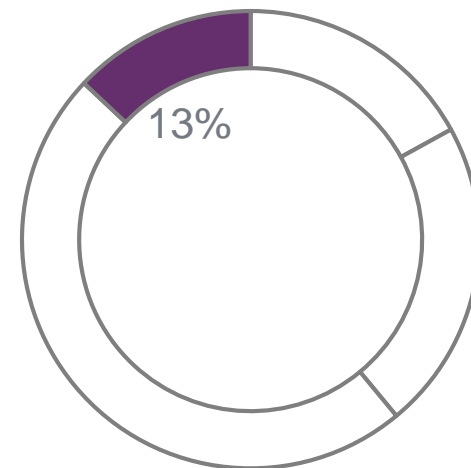
- More than eight-in-ten (83%) have consumed cannabis, with nearly one-half (47%) currently doing so. This segment includes a large proportion of medical cannabis users, as well as those who use this drug at least once per week.
- Very high support for legalization (97%, including 60% who strongly support); unlike other segments, more than one-half (59%) want legal cannabis treated like tobacco rather than like alcohol.

## Cannabis Retail and Production

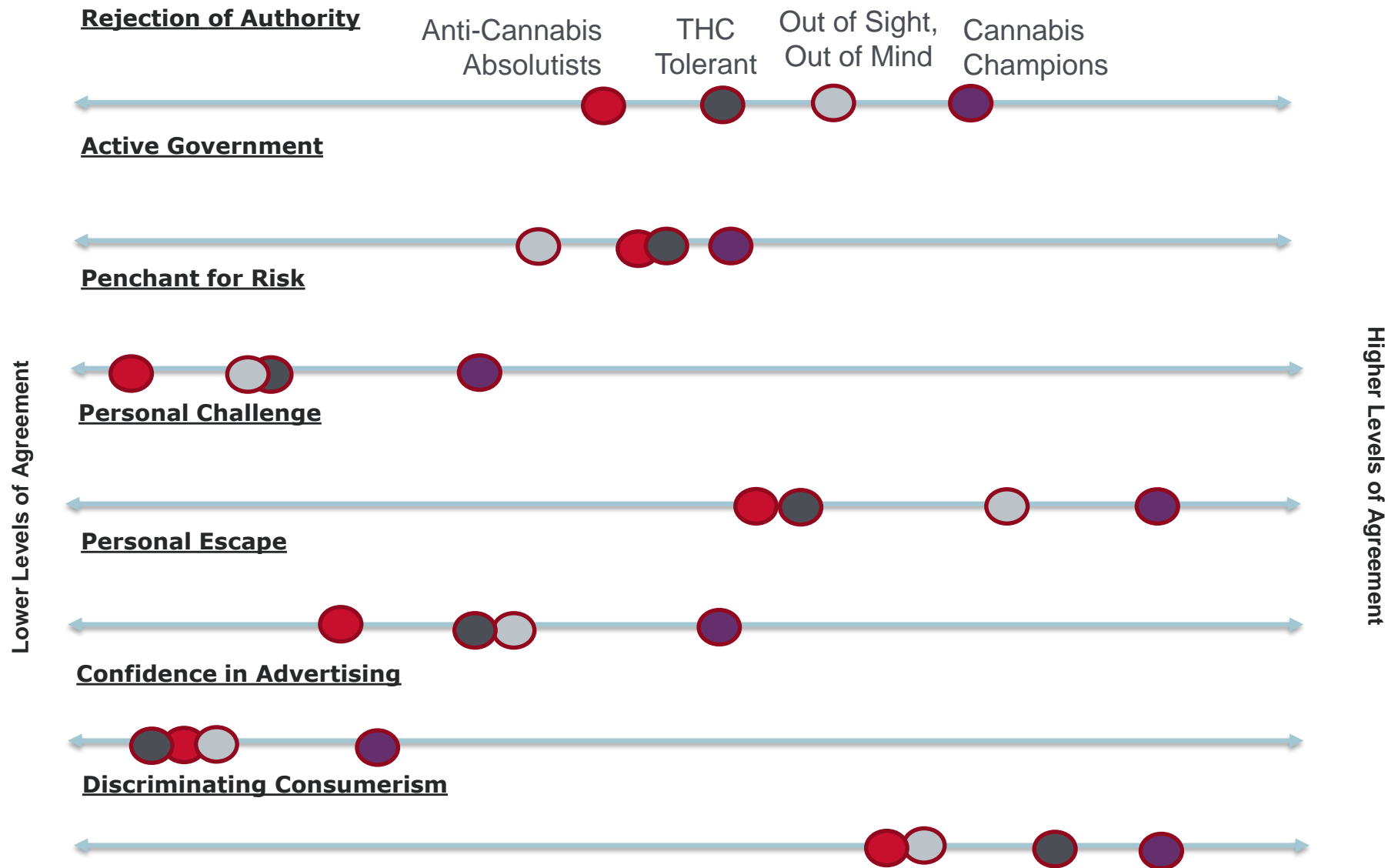
- Most want a cannabis retailer in their neighbourhood; even two-thirds (68%) support having a commercial grower nearby.
- Members of this segment are least likely to want to see restrictions placed on retailers in commercial areas, and are more likely to want cannabis retailers to be allowed longer operating hours than liquor stores (21% support this).
- Cannabis Champions are also least likely to support minimum distance restrictions related to liquor stores and other cannabis retailers (though most support minimum distances from schools and vulnerable populations).

## Views regarding public consumption/home growing

- Cannabis Champions accept cannabis consumption in most outdoor public spaces, but are split on whether it is acceptable to consume cannabis on a patio. The only instance where a majority say consumption is unacceptable is at a public transit stop.
- Nearly four in ten cannabis users (37%) in this segment anticipate growing cannabis plants in their households. Members of this segment are not concerned about odour from plants or smoking; however, four-in-ten (42%) do indicate they are concerned about people breaking into property to steal cannabis plants.



# Social Values Comparison



Dots represent Top-2 box (strongly/somewhat agree) placement on a 0-100 agreement scale for Social Values statements.

# Cannabis Retail and Production

## Support For Legalization (General)



## Support for publicly-owned cannabis retailer in neighbourhood



## Support for privately-owned cannabis retailer in neighbourhood



## Support for cannabis grower in neighbourhood



## Support for restrictions on cannabis retail zoning in commercial areas



## Support for limiting cannabis production to industrial areas of Calgary



Lower Levels of Support

Higher Levels of Support

*Dots represent Top-2 box (strongly/somewhat support) placement on a 0-100 scale.*

# Neighbourhood Concerns

## Concern about odour from neighbours smoking cannabis



## Concern about odours related to growing/processing plants



## Concern about people stealing plants



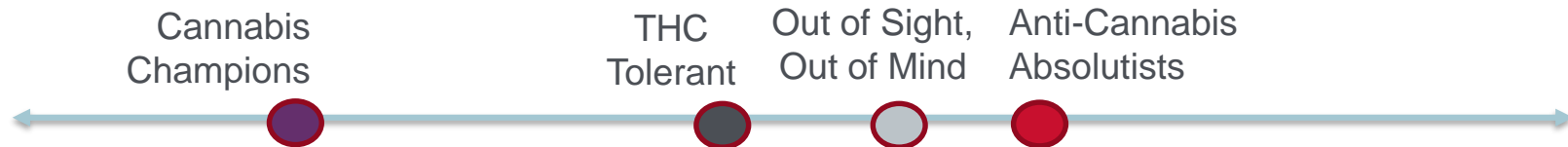
Lower Levels of Concern

Higher Levels of Concern

*Dots represent Top-2 box (very/somewhat concerned) placement on 0-100 scales.*

# Siting Restrictions

## Minimum distance from liquor stores



## Minimum distance from other cannabis retailers



## Minimum distance from vulnerable populations



## Minimum distance from schools



*Dots represent Top-2 box (strongly/somewhat support) placement on 0-100 scales.*

# Acceptance of Public Consumption

