



## Cannabis Retail Store Survey Report



December 2018

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# Methodology & Logistics

## Background & Overview:

The following represents the findings from a December 2018 public opinion telephone survey of City of Greater Sudbury residents (19 years of age or older) conducted by Oraclepoll Research Limited for The City of Greater Sudbury. The purpose of the research was to gather opinions from residents on issues related to allowing cannabis retail stores in the community.

## Study Sample:

A total of N=1008 interviews were completed, with N=84 surveys conducted in each of the twelve (12) Wards. The survey screened to ensure respondents were 19 years of age or older. Gender and age samples were also monitored to ensure they reflected the demographic characteristics of the community.

## Survey Method:

All surveys were conducted by telephone using live operators at the Oraclepoll call center facility. A total of 20% of all interviews were monitored and the management of Oraclepoll Research Limited supervised 100%.

The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection (RDD). A dual sample frame random database was used that was inclusive of landline and cellular telephone numbers.

## Logistics:

Surveys were conducted by telephone at the Oraclepoll call center using person to person live operators from the days of December 1<sup>st</sup> and December 6<sup>th</sup>, 2018.

Initial calls were made between the hours of 6:00 p.m. and 9:00 p.m. Subsequent call-backs of no-answers and busy numbers were made on a (staggered) daily rotating basis up to 5 times (from 10:00 a.m. to 9:00 p.m.) until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact. If no contact was made at a number after the fifth attempt, the number was discarded and a new one supplanted it.

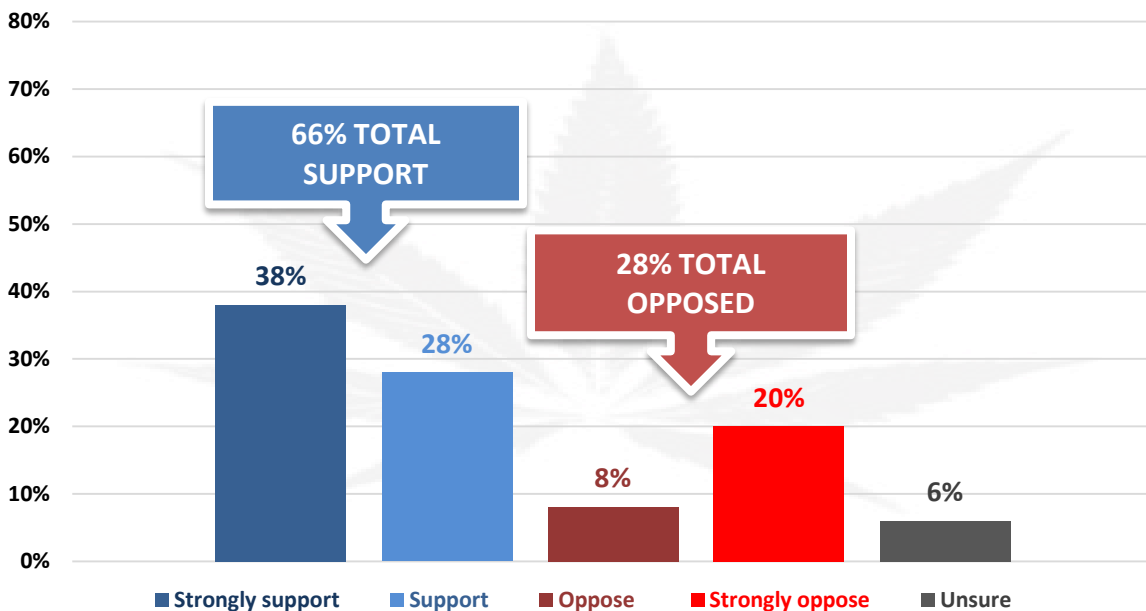
## Confidence:

The margin of error for the total N=1008 sample is  $\pm 3.1\%$  at 95% confidence.

## Support / Opposition to Cannabis Stores

The first question asked all N=1008 respondents if they support or oppose having cannabis retail stores in the City of Greater Sudbury. A four-point rating scale was used to gauge support (support & strongly support) and opposition (opposed & strongly opposed).

*Q1. "Do you support or oppose having cannabis retail stores operating in the City of Greater Sudbury? Please respond using a scale of strongly support, somewhat support, somewhat oppose or strongly oppose."*



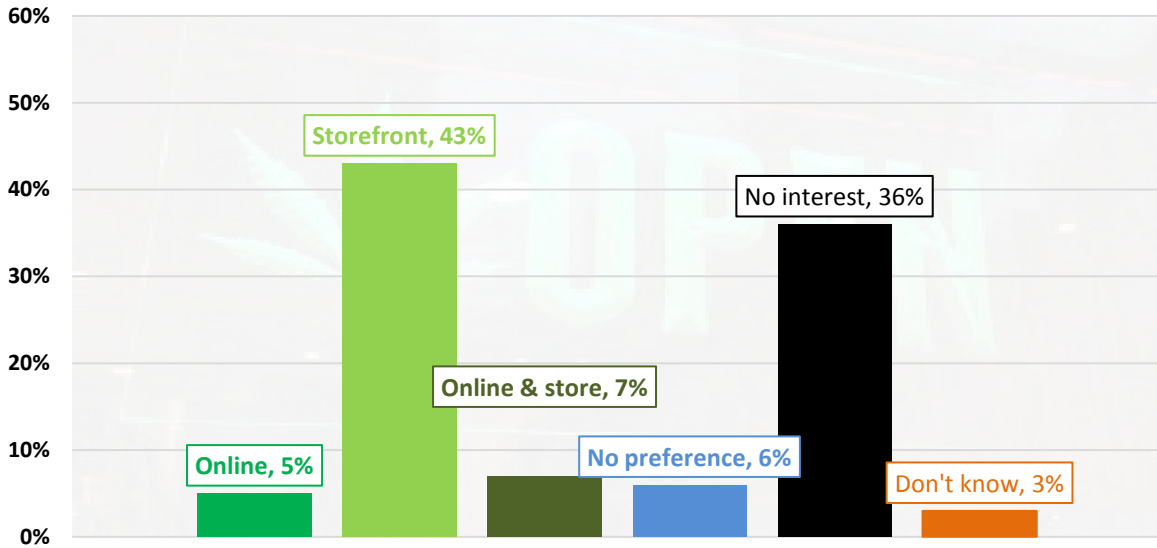
In total, 66% of residents support (28%) or strongly support (38%) having retail cannabis stores operating within the municipality. Almost three in ten or 28% oppose (8%) or strongly oppose (20%) the presence of cannabis retail outlets in the community, while 6% were undecided.

Younger residents aged 19 to 34 most support cannabis retailers at 79%, followed by 35 to 50-year old's at 71%. Support drops to 63% among those 51 to 64 and half of seniors 65+ are in favor at 50%. More males (70%) in relation to females (62%) also back having retail stores.

## Preferred Purchase Method


Next, respondents were asked about their preferred method to purchase cannabis – either online or at a retail store. This question is projective or hypothetical and was not intended to be a definitive indication of one’s usage or intended usage. Results below reveal how citizens prefer the sale of legal cannabis to be

**Q2. “If you were to purchase cannabis, would you prefer to purchase it online or at a storefront?”**



Storefront retail was most named by 43% of residents, while only 4% preferred an online only option, 7% a mix of online and a store and 6% claimed to have no preference. There were 36% that answered they have no interest in purchasing cannabis and 3% were unsure.

Retail storefronts had the highest response from those in the 19 to 34 (54%) and 35 to 50 (48%) cohorts, next followed by 51 to 64-year old’s (37%) and then respondents 65+ (34%). Online purchasing was most recalled by 19 to 34 (8%) and 35 to 50 year old’s, as was online and storefront (9% – 19 to 34 & 9% – 35 to 50). Respondents most inclined to say they had no intent to purchase were 65+ at 50% and 51 to 64 years of age at 41% (31%–35 to 50 & 25%–19 to 34). Do not know answers were slightly elevated among those 65+ (7%) and no preference by 51 to 64-year old’s (12%).

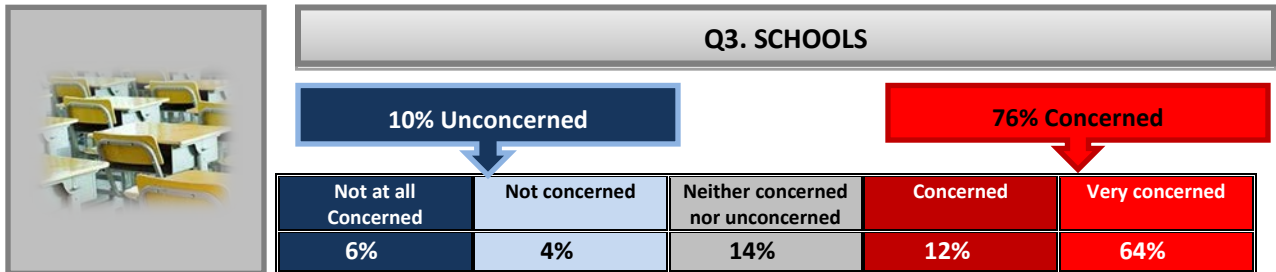
 *Note: Results are consistent with an Oraclepoll national syndicated survey on cannabis conducted in 2017. In that study, regardless of usage, more Canadians preferred retail outlets to online delivery methods – this because a significant number felt that distribution of the product could be better managed to ensure that sales to minors would be controlled.*



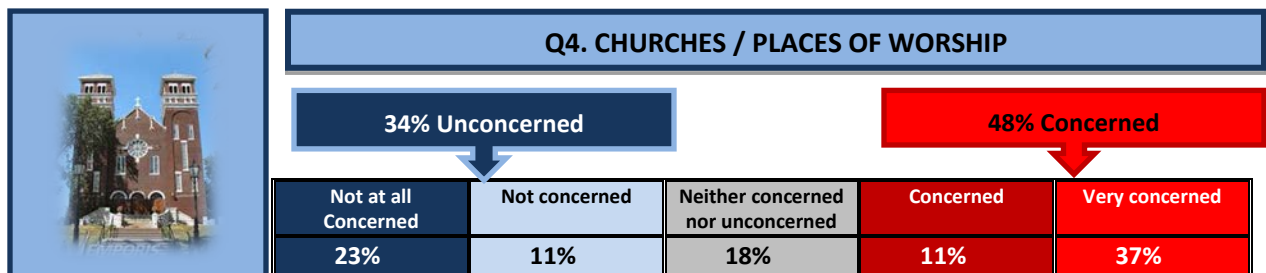
# Locational Concerns

Respondents were then asked to rate their level of concern with having cannabis retailers in proximity to a series of institutions, areas or facilities in the community.

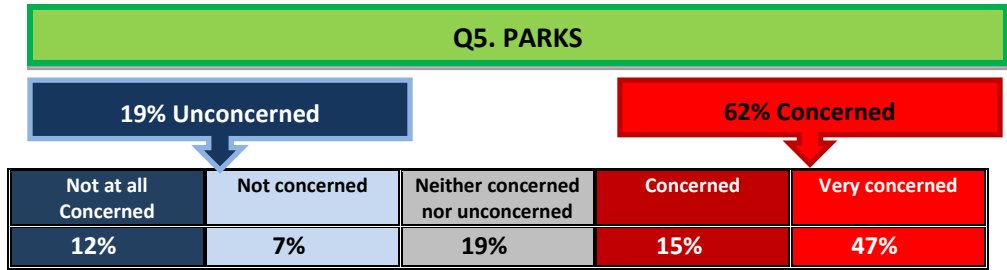
*“Please rate your level of concern with respect to having cannabis retail stores located in proximity to various locations in the community. After each location I read, please respond using a scale from one not at all concerned to five very concerned.”*



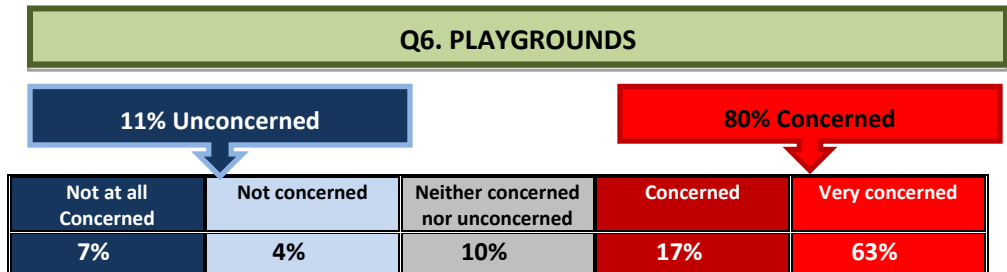
- There are more than three-quarters or 76% of residents concerned with having locations in proximity to schools, with those 65+ (85%), 51 to 64 (80%) and 35 to 50 (78%) being most concerned, compared to 19 to 34-year old’s (61%). Only 10% were unconcerned while 14% had a mid-point view. This is the area of third highest concern after daycares and playgrounds.



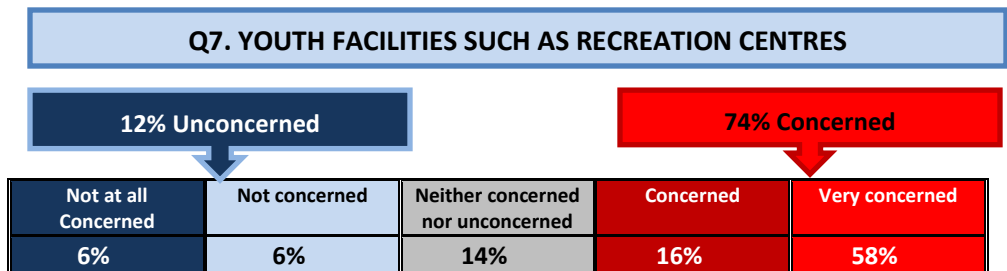
- Less than half or 48% expressed concern with having cannabis retailers near churches or places of worship. Older respondents 65+ (59%) and 51 to 64 (52%) were most likely to be concerned.



- Concern over having retailers located near parks is 62%, with only 19% having no concerns and 19% expressing a neutral opinion of neither concerned nor unconcerned. Older residents 65+ had rated concern in this category the highest at 77% in relation to younger cohorts.



- The second highest rated locational concern (after daycares) as expressed by 80% of residents was for having cannabis retail stores located near playgrounds. All cohorts expressed concern with having a storefront near this type of location.

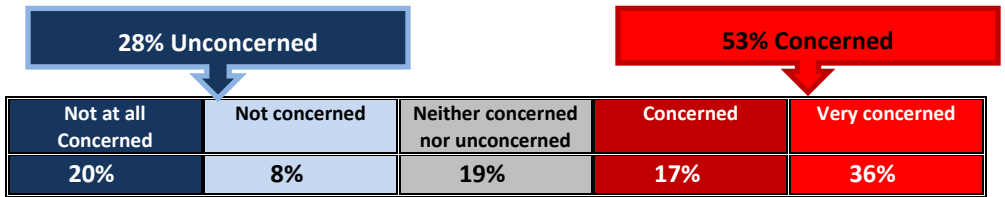


- Seventy-four percent said they were concerned (16%) or very concerned (58%) with having cannabis dispensaries operating near youth facilities – an area rated fourth in terms of concern. This included most of seniors 65+ (88%) and 84% of those aged 51 to 64, while a still majority but lesser number in younger age brackets were concerned (19 to 34 – 62% & 35 to 50 – 65%). A higher number of females (77%) compared to males (72%) were concerned.





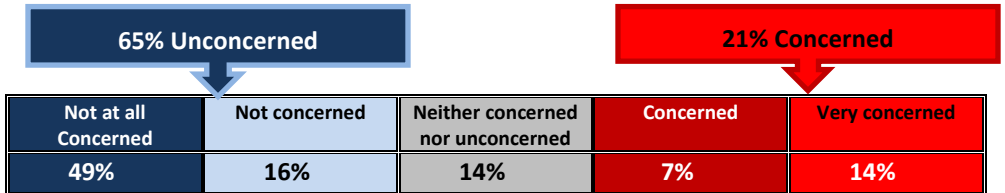
**Q8. LIBRARIES**



More than half of residents or 53% expressed concern over locating stores near libraries, while almost three in ten were unconcerned (28%) and 19% were neither concerned nor unconcerned with having an outlet near a library.



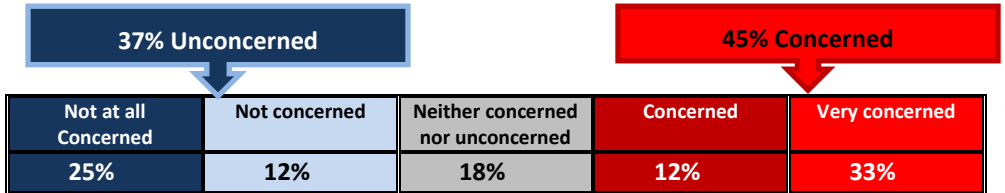
**Q9. EXISTING LCBO'S**



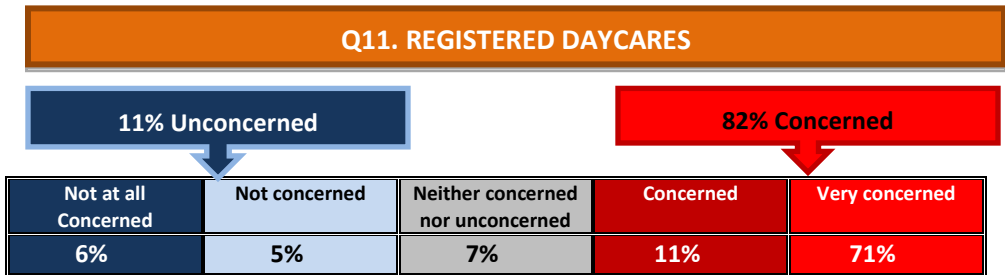
The lowest concern at 21% and highest unconcerned rating (65%) was for locating cannabis stores near LCBO outlets.



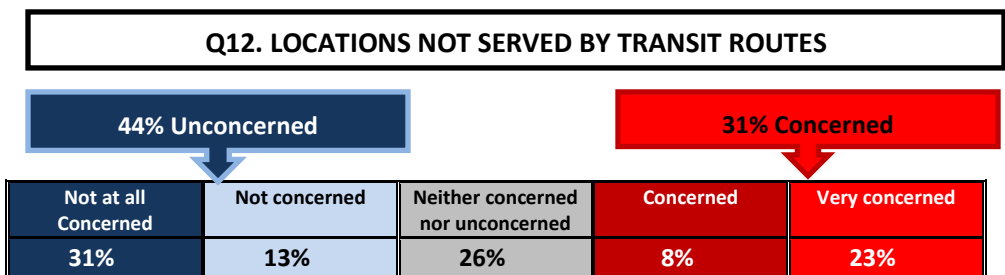
**Q10. HIGH DENSITY RESIDENTIAL NEIGHBOURHOODS**



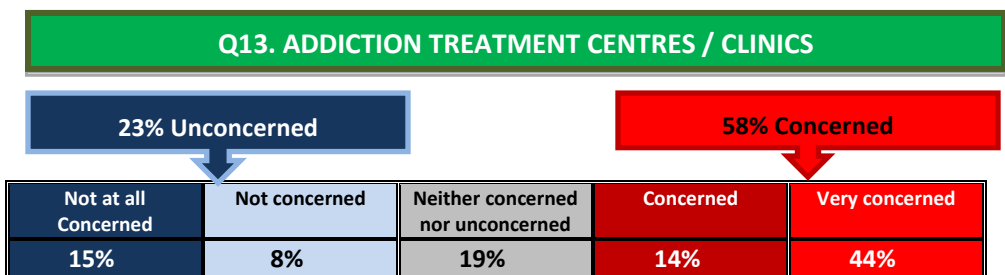
There was more of a split of opinion on locating stores near high density neighborhoods with 45% being concerned and 37% unconcerned. The gender divide was most evident with this indicator as 52% of females were concerned in relation to only 38% of males.



- The highest rated location that was of concern for residents was for having cannabis retailers in the proximity of daycares with 82% being concerned compared to only 11% unconcerned.



- The second lowest rated area of concern after having locations near LCBO's was for allowing stores in areas not served by transit at 31%. Forty-four percent were unconcerned and 26% were neither concerned nor unconcerned.



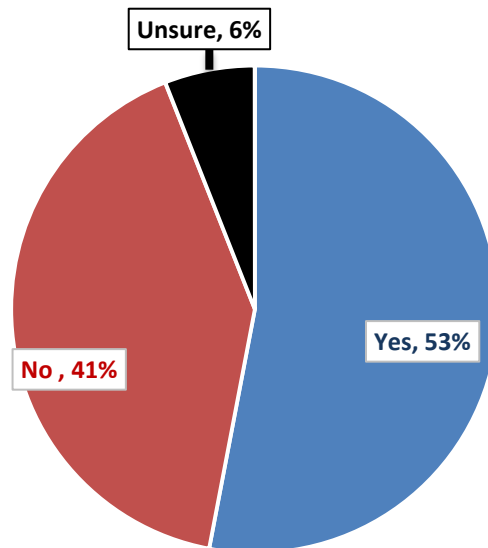
- Having cannabis stores in proximity to addiction treatment clinics concerned almost six in ten or 58% of residents. Less than one-quarter or 23% were unconcerned and 19% were neither concerned nor unconcerned.

## Restrictions

The following short statement was read that provided a brief description of the Smoke Free Ontario Act which has been updated to include where cannabis and tobacco can be consumed. Respondents were then asked if they felt the City of Greater Sudbury should place further restrictions on where these products can be consumed.

*“The Province of Ontario has updated the new Smoke Free Ontario Act to include areas where tobacco and cannabis cannot be consumed. This includes a nine-metre restriction to the entrance of a medical health facility and restaurant patio, a 20-metre restriction to a playground and perimeter of a sports field, school and recreation facility.”*

**Q14. “In your opinion, should the City of Greater Sudbury further restrict where tobacco and cannabis can be consumed?”**

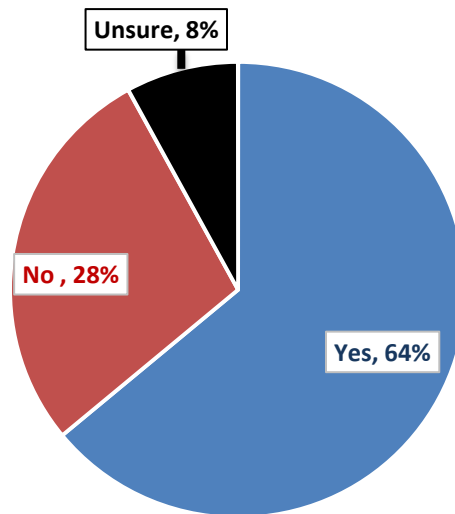


A slim 53% majority of residents are of the opinion that the City should further restrict where tobacco and cannabis can be consumed. Slightly more than four in ten (41%) do not support this policy and 6% were undecided. Support for further restrictions was lowest among the 19 to 34-year old's at 30% (yes) as they were most likely to say no (62%). Residents 65+ (66%) and 51 to 64 (61%) most back further restrictions answering yes, while residents in the aged 35 to 50 were most split on the issue (54%–yes & 39%–no).

## Provincial Funding

In a final question, respondents were asked if they felt the City of Greater Sudbury should receive provincial funding to assist with any issues arising from cannabis retail stores in the community.

**Q15. "In your opinion, should the City of Greater Sudbury receive funding from the province to help with issues arising from cannabis retail stores?"**



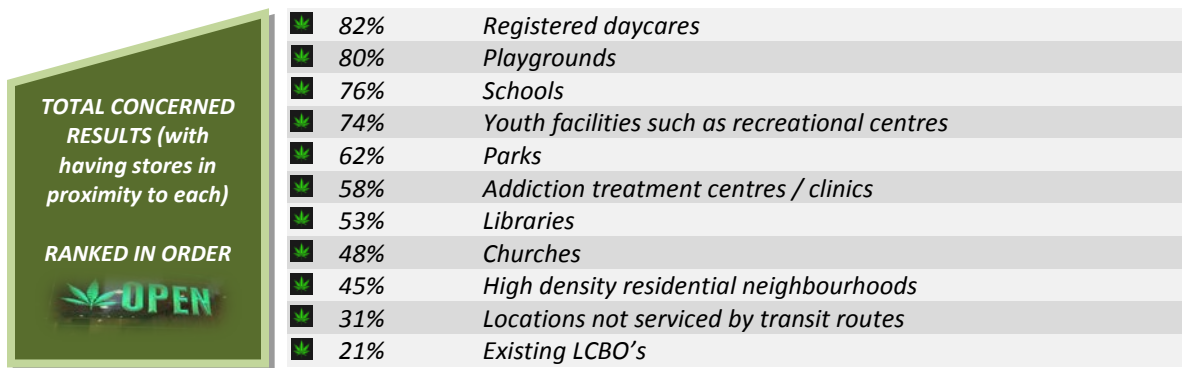
Sixty-four percent of those surveyed agreed that the municipality should receive provincial money to help offset issues that may result in cannabis stores in the City of Greater Sudbury.

## Summary

There is majority support as expressed by nearly two-thirds or 66% for having retail cannabis stores in the City, while 28% are opposed. However, only 38% strongly support having stores and 28% somewhat support the measure. Younger residents tend to be more in favor compared to those older as are more males in relation to females.

Regardless of personal consumption of cannabis, respondents clearly prefer storefront retail as the best way to have cannabis sold to residents in the community. As stated, the intent of the question was to determine a public policy approach to managing sales rather than usage or product demand.

Despite an overall willingness to accept cannabis dispensaries in the community, residents do have concerns over their potential locations. The highest concern is having these retail shops in proximity to where young children are present – including, daycares, playgrounds, schools and youth facilities such as recreation centers. Majority concern was also expressed over locating cannabis stores close to parks, addiction treatment facilities and to a lesser extent near libraries. There is moderate or mid-level concern with having them in proximity to churches and high-density residential neighborhoods. A low level of trepidation was expressed over cannabis stores being located where there is no transit service and a very low number are concerned with them being in proximity to LCBO's. Overall, concern was driven by age, with older residents expressing more concerns compared to younger citizens.



A slender majority of slightly more than half of Greater Sudbury residents also want to see tighter regulations above provincial standards on where cannabis as well as tobacco can be consumed. In addition, more than six in ten would support or like to see provincial money in the community to help offset any issues related to cannabis retail outlets.