



2018 Cannabis Research:
Mail-to-Web Survey

Final Report

April 16, 2018

Banister Research Ltd.



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1.0 Executive Summary

Banister Research was contracted by the City of St. Albert to conduct cannabis-related research with City residents and stakeholders. The City of St. Albert and Banister Research sent a letter to 4,000 randomly-selected households, inviting them to participate in the survey. The survey was accessed via PIN, as provided in the letter, thus ensuring only one response per household. A total of 734 online surveys were completed from March 21 to April 4, 2018, with residents and stakeholders who responded to a direct mail invite.

The following is a summary of the key findings from the **2018 Cannabis Research: Mail-Recruit-to-Web Survey** responses. For detailed survey results, please refer to [Section 3.0](#).

Overall Perceptions

- Top-of-mind (unaided) concerns about cannabis legalization use included:
 - Impaired driving (52% of those with concerns – n=391);
 - Underage access and exposure to cannabis (19%);
 - Odours from smoking in public (16%);
 - Public smoking and vaping, in general (16%); and
 - Public health impacts (15%)
- Top aided concerns included: impaired driving (83% of all respondents); workplace safety (71%); and education for youth and families (68%).

Public Consumption

- Two-thirds of the respondents (67%) agreed that “smoking and vaping cannabis should be banned in all public places,” while 25% agreed that “adults should be able to smoke and vape cannabis in the same places you can smoke tobacco.”
- Places that were most often considered acceptable for consumption included backyards (77%) and porches or balconies (62%). Just under 6 in 10 responses (58%) indicated that cannabis use should only be allowed in designated areas at festivals and events.
- Nearly three-quarters of the respondents were concerned about smoke from public consumption (72%), while approximately two-thirds each were concerned about odours (68%), and public smoking and vaping, in general (67%).
- While approximately 6 in 10 respondents (61%) indicated it was important that the City has sufficient resources to enforce cannabis bylaws, 53% were opposed to a tax increase.

Venues for Consumption

- Nearly 3 in 10 respondents (28%) supported the idea of venues for smoking or vaping, while 33% supported the idea of venues allowing consumption of edibles.



Business Regulations

- Over 4 in 10 respondents (45%) supported cannabis retail store operations in the same areas where liquor stores are allowed, and 61% indicated that cannabis stores in St. Albert should have the same operating hours as liquor stores.
- About 7 in 10 responses (69%) indicated that the City should charge a higher licensing fee for cannabis retail stores, as they do for stores selling tobacco products.
- The top concern about retail operations was how close cannabis stores will be to places where children and youth gather (e.g., schools, community centres, parks, and playgrounds) (80%). Minimum distance regulations of 200 metres or more were considered appropriate for places where children and youth gather (77%) and public facilities (69%).

Home Growing and Production

- Approximately 6 in 10 respondents (62%) felt that cannabis should be permitted to be grown inside ones' home (62%) or in a greenhouse (58%). Seven percent (7%) of the respondents were likely to grow their own cannabis plants at home.
- Nearly 6 in 10 respondents (59%) were concerned about neighbours who grow or smoke cannabis, while 44% indicated concern about the safety of growing cannabis plants in the home.
- With regards to production facilities, more than half of the respondents (57%) were concerned about odours, while 41% were concerned about fire safety.

Support for Legalization

- Overall, 42% supported the legalization of cannabis for recreational use.
- More than one-third (35%) of the responses agreed that “legalizing cannabis and having legitimate businesses related to cannabis will be positive for St. Albert’s economy.”
- The majority of respondents (84%) were not interested in starting a cannabis-related business or pursuing a job related to cannabis (6% were).
- Three-quarters of the respondents (75%) were personally unlikely to buy cannabis products from a retail store (17% were likely to).

2.0 Project Background

The recreational use of cannabis will become legal in the summer of 2018. Both the federal and provincial governments have made legislative changes to account for this change. However, there are decisions requiring input into how the sale and consumption of cannabis will be handled in St. Albert.

To help City Council and Administration address the potential impacts of the legalization of cannabis on St. Albert and to inform the public of the upcoming legalization and the City's role, the City contracted Banister Research Ltd. to conduct a survey with residents and stakeholders inviting them to gather input to help shape future bylaws and practices regarding:

- Store locations;
- Smoking and vaping of cannabis in public;
- Considerations for business licensing applications; and
- Overall, to understanding future needs for information and municipal services.

Surveys were completed between March 21 and April 4, 2018 via the following methods:

- A **mail-recruit-to-web survey**, for which 4,000 randomly-selected residents were invited via mail to complete the survey through a closed link. Each household was provided a PIN, which they used to access the survey, thereby ensuring that one response was submitted per household. A total of n=734 respondents completed the online survey.
- A **public engagement web survey**, available to all residents and stakeholders via open link (n=2,385 responses). As this survey was set up to encourage participation of all community members, more than one member of the household was allowed to participate.

This report outlines the findings from the **Mail-Recruit-to-Web Survey**, conducted as part of the 2018 Cannabis Research. Based on a final sample size of n=734, results yield a margin of error no greater than $\pm 3.6\%$ at the 95% confidence level, or 19 times out of 20.

The detailed survey methodology and final questionnaire can be found in [Appendix A](#) and [Appendix B](#), respectively.

The results from the Public Engagement Web Survey, open to all members of the community, are available under a separate report cover.

3.0 Study Findings

Results of the survey are presented as they relate to the specific topic areas addressed by the survey. It is important to note that the data tables, available under a separate cover, provide a detailed analysis of all survey findings. The reader should also note, when reading the report that the term *significant* refers to "statistical significance." Only those respondent subgroups (e.g., findings broken down by age, gender, etc.) which reveal statistically significant differences at the 95% confidence level (19 times out of 20) have been included.

Any discrepancies in percentages can be attributed to rounding.

3.1 Profile

All of the respondents (100%) were residents of the City of St. Albert, while 4% were also business owners or managers. See Table 1, below.

Table 1

Which of the following interests do you represent when completing this survey?	
	Percent of Respondents* (n=734)
Resident of the City of St. Albert	100
Business owner or manager	4
Not-for-profit or charitable organization	2
Municipal employee (i.e., employed by the City of St. Albert)	1
A community league or association	1

*Multiple responses

3.2 Overall Perceptions

Respondents were provided the following information:

Cannabis refers to products made from the leaves and flowers of the cannabis plant. You may have also heard it called marijuana or pot. Cannabis can be smoked, used with a vaporizer (vaping), or added to food or drinks. To help identify future needs for information and services, the City of St. Albert would like to understand your overall opinion of cannabis legalization and the potential impact on the community.

When asked if they had any top-of-mind concerns regarding the legalization of cannabis, 66% of the respondents (n=483 of which n=391 were sampled for coding¹) mentioned concerns: impaired driving (52% of those with concerns); underage access and exposure to cannabis (19%), odours from smoking in public (16%), public smoking and vaping (16%), and public health impacts (15%). See Table 2, below.

Table 2

Top of mind, do you have any concerns regarding the legalization of cannabis?	
Base: Respondents with concerns.	Percent of Respondents* (n=391)
Impaired driving	52
Underage access/exposure to cannabis	19
Odours from smoking cannabis in public	16
Public smoking and vaping of cannabis	16
Public health impacts	15
Cannabis-related crime	10
Where residents can consume cannabis in St. Albert	8
The operation of cannabis stores	7
Workplace safety	6
Against the legalization of cannabis, in general	6
Cost/tax increase concerns	5
Cannabis is a gateway drug/will lead to hard drugs/drug addiction	5
The location of cannabis stores	4
Other (3% of respondents or less)	14

*Multiple responses

¹ A random sample of up to n=400 responses was used for the coding of each open-ended question.

Using a scale of 1 to 5 (1 being “not at all concerned” and 5 being “very concerned”), respondents most often reported being concerned with impaired driving (83% provided a rating of 4 or 5 out of 5), workplace safety (71%), and education for youth and families (68%). Conversely, respondents were least concerned with business opportunities related to cannabis (26% provided a rating of 4 or 5) and services for counselling available in St. Albert (44%). See Table 3 for the detailed breakdown of results.

Figure 1

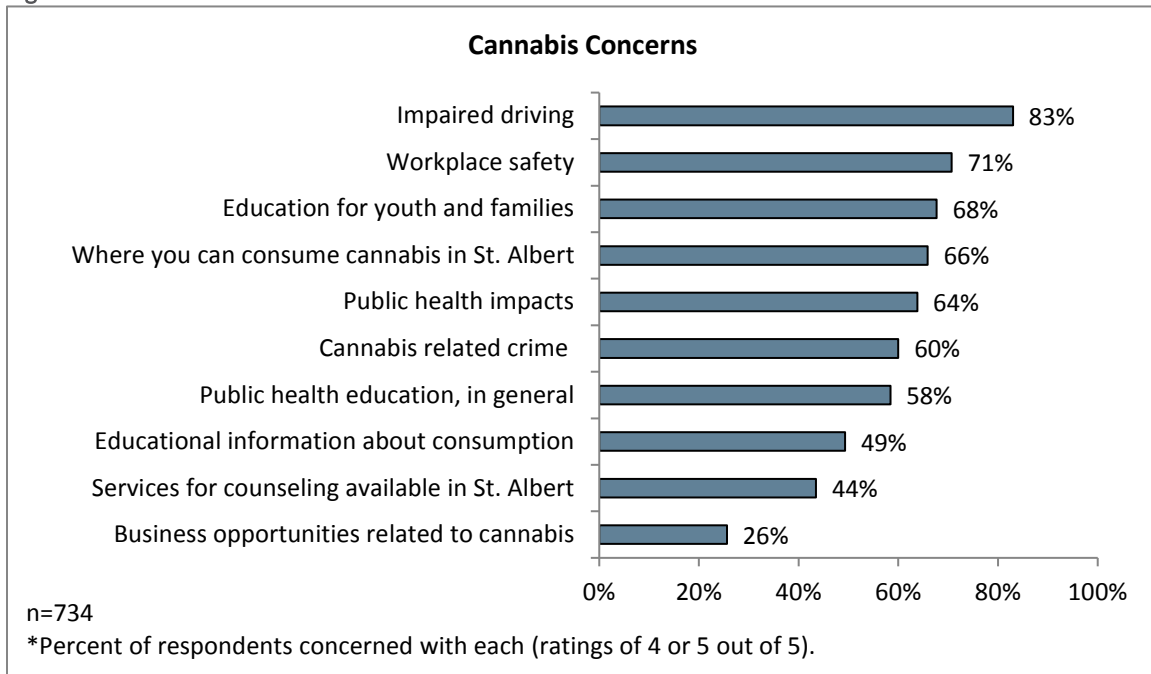


Table 3

How concerned are you with each of the following aspects of cannabis legalization?							
	Percent of Respondents (n=734)						
	(1) Not at all Concerned	(2)	(3)	(4)	(5) Very Concerned	Don't Know/ Not Stated	Mean (out of 5)
Impaired driving	5	5	7	14	69	<1	4.38
Workplace safety	9	8	12	15	56	1	4.02
Education for youth and families	9	8	15	20	47	<1	3.90
Where you can consume cannabis in St. Albert	13	10	11	16	50	<1	3.80
Public health impacts	13	9	13	17	47	2	3.78
Public health education, in general	11	10	20	22	36	1	3.64
Cannabis related crime	19	10	10	12	48	1	3.61
Educational information about how to properly consume cannabis	19	12	20	18	32	<1	3.32
Services for Counseling available in St. Albert	19	14	22	17	27	1	3.18
Business opportunities related to cannabis	40	15	19	8	17	<1	2.48

Respondent Sub-Segment Analysis

Those who opposed cannabis legalization or were neutral were significantly more likely to be **concerned with all aspects of cannabis legalization**, with the exception of business opportunities related to cannabis, versus those who supported cannabis legalization.

Those ages 35 and older, and those who are not employed full or part-time were also significantly more likely to be concerned with **all aspects of cannabis legalization** with the exception of business opportunities related to cannabis, versus those ages 34 and younger, and those who were employed full or part-time.

Females (54%) were significantly more likely to be concerned, in particular, with **educational information about how to properly consume cannabis** versus males (44%).

Respondents significantly more likely to be concerned with **education for youth and families** included:

- Females (71%) versus males (64%); and
- Those whose total annual household income was less than \$100,000 (70%) versus those whose income was \$100,000 to less than \$200,000 (61%).

Respondents significantly more likely to be concerned with **public health impacts** included:

- Females (67%) versus males (60%);
- Those whose highest level of education is post-graduate studies (69%) versus those whose highest level was high school or less (54%); and
- Those whose total annual household income was \$200,000 or greater (69%) versus those whose income was \$100,000 to less than \$200,000 (55%).

Females (62%) were significantly more likely to be concerned with **public health education, in general** versus males (54%).


Those whose total annual household income was less than \$100,000 (65%) or \$200,000 or greater (71%) were significantly more likely to be concerned with **where you can consume cannabis in St. Albert** versus those whose income was \$100,000 to less than \$200,000 (55%).

Females (51%) were significantly more likely to be concerned with **services for counselling available in St. Albert** versus males (37%).

Respondents significantly more likely to be concerned with **impaired driving** included:

- Females (86%) versus males (80%);
- Those whose highest level of education is post-graduate studies (87%) versus those whose highest level was high school or less (76%); and
- Those whose total annual household income was less than \$100,000 (85%) versus those whose income was \$100,000 to less than \$200,000 (77%).

Those whose total annual household income was less than \$100,000 (61%) were significantly more likely to be concerned with **cannabis related crime** versus those whose income was \$100,000 to less than \$200,000 (51%).



Those whose total annual household income was less than \$100,000 (74%) or \$200,000 or greater (74%) were significantly more likely to be concerned with **workplace safety** versus those whose income was \$100,000 to less than \$200,000 (63%).

Respondents significantly more likely to be concerned with **business opportunities related to cannabis** included:

- Those with children in their household (31%) versus those without children (23%);
- Those who rent their home (45%) versus those who own (24%); and
- Those whose highest level of education is university or college (27%) versus those whose highest level is post-graduate studies (17%).

3.3 Consumption

With regards to public consumption, respondents were provided the following information:

The provincial government has stated that the smoking and vaping of cannabis in public will be restricted to spaces where tobacco smoking is also allowed.

The province and the City of St. Albert have laws that prevent smoking of tobacco (cigarettes) near playgrounds, outside schools, and at entrances to buildings. This means that people may smoke tobacco on the sidewalk in public, in parks and on trails. The City could decide to allow smoking of cannabis where smoking of tobacco is allowed, or to ban it in public altogether.

The City of St. Albert will be responsible for enforcing smoking and vaping of cannabis in public. This would likely be done by issuing warnings and tickets to individuals who are smoking and vaping in public where they are not allowed to.

Given this information, respondents were asked how strongly they agreed with a couple of statements regarding public consumption. As shown in Figures 2 and 3, one-quarter of respondents (25%) agreed that “Adults should be able to smoke and vape cannabis in the same places you can smoke tobacco,” while two-thirds (67%) agreed that “Smoking and vaping cannabis should be banned in all public places.”

Figure 2

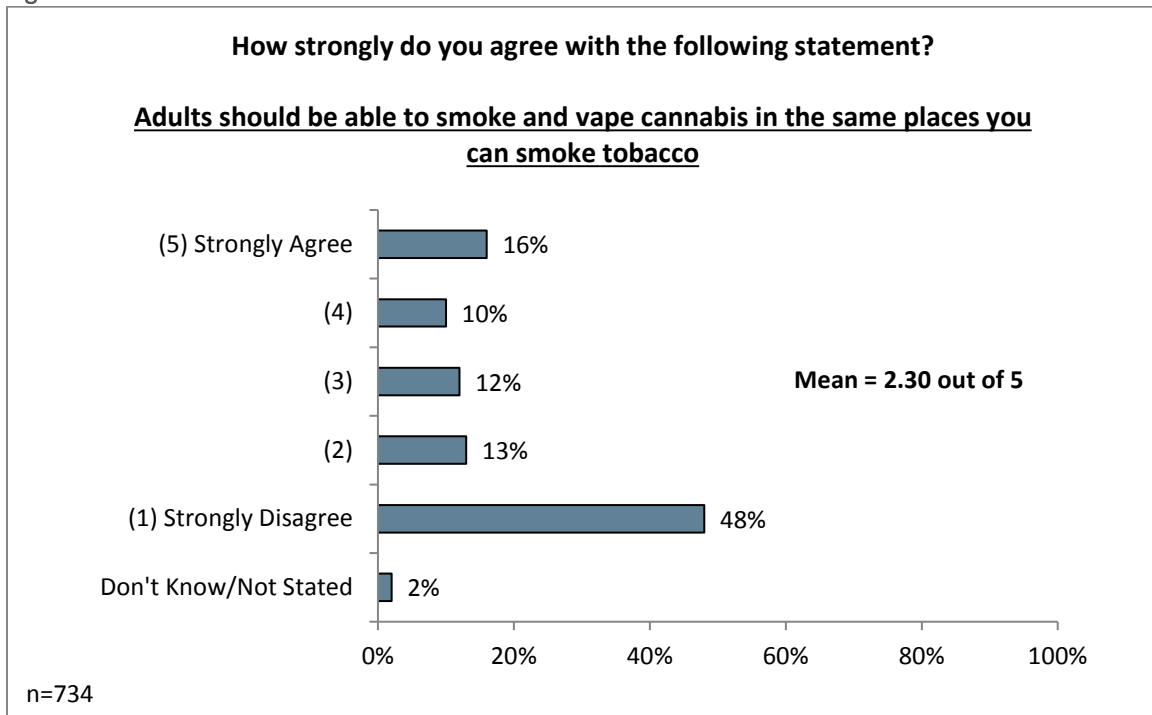
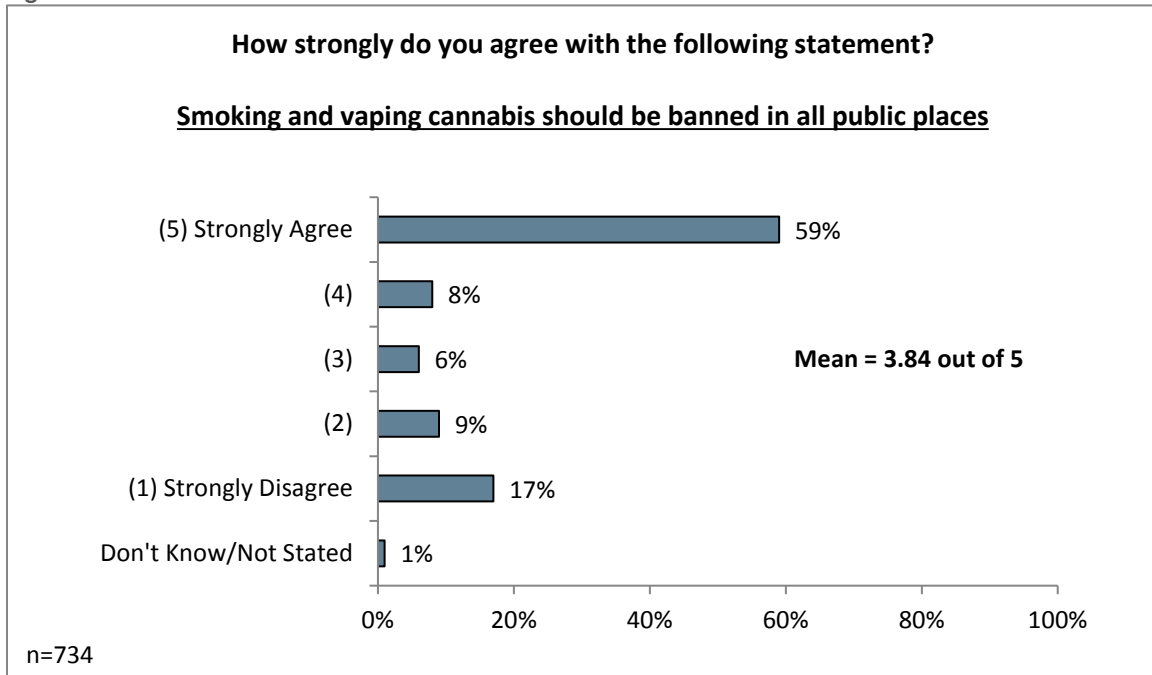


Figure 3



Respondent Sub-Segment Analysis

Respondents significantly *more likely* to agree with the statement **“adults should be able to smoke and vape cannabis in the same places you can smoke tobacco”** included:

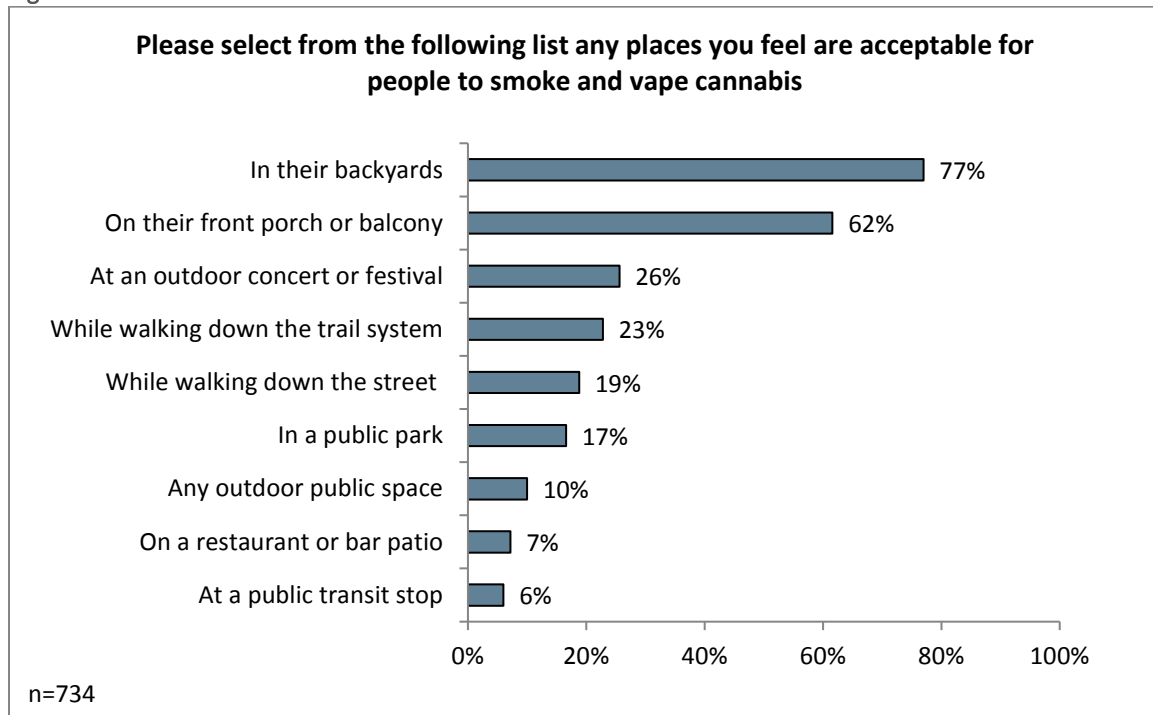
- Those who were neutral (22%) or supported cannabis legalization (47%) versus those who opposed it (7%);
- Those ages 34 and under (53%) versus those ages 35 and older (21% to 23%);
- Males (30%) versus females (21%);
- Those who rent their home (50%) versus those who own (24%); and
- Those whose total annual household income was less than \$200,000 (28% to 30%) versus those whose income was \$200,000 or greater (13%).

Respondents significantly *more likely* to agree with the statement **“smoking and vaping cannabis should be banned in all public places”** included:

- Those who opposed cannabis legalization (90%) or were neutral (69%) versus those who supported it (41%);
- Those ages 35 and older (68% to 71%) versus those ages 34 and younger (40%);
- Those who own their home (68%) versus those who rent (43%);
- Those who do not work full or part-time (73%) versus those who are employed full or part-time (63%); and
- Those whose total annual household income was \$200,000 or greater (74%) versus those whose income was less than \$200,000 (61%).

When asked what kinds of places they felt would be acceptable for people to smoke and vape cannabis, respondents most often suggested in residents' backyards (77%) and on residential porches or balconies (62%). Fewer than 1 in 10 respondents felt that it would be acceptable for people to smoke and vape cannabis on a restaurant or bar patio (7%) or at a public transit stop (6%).

Figure 4




Respondent Sub-Segment Analysis

Males were significantly more likely than females to identify the following places as those they feel are **acceptable** for people to smoke and vape cannabis:

- In their backyards (80% versus 74% of females);
- On their front porch or balcony (66% versus 58%);
- In a public park (21% versus 13%);
- At an outdoor concert or festival (32% versus 20%); and
- While walking down the trail system (26% versus 19%).

Those who **rent their home** were significantly more likely than homeowners to identify the following places as those they feel are **acceptable** for people to smoke and vape cannabis:

- While walking down the street (41% versus 18% of homeowners); and
- While walking down the trail system (45% versus 22%).



Those who are **employed full or part-time** were significantly more likely to identify the following places as those they feel are **acceptable** for people to smoke and vape cannabis:

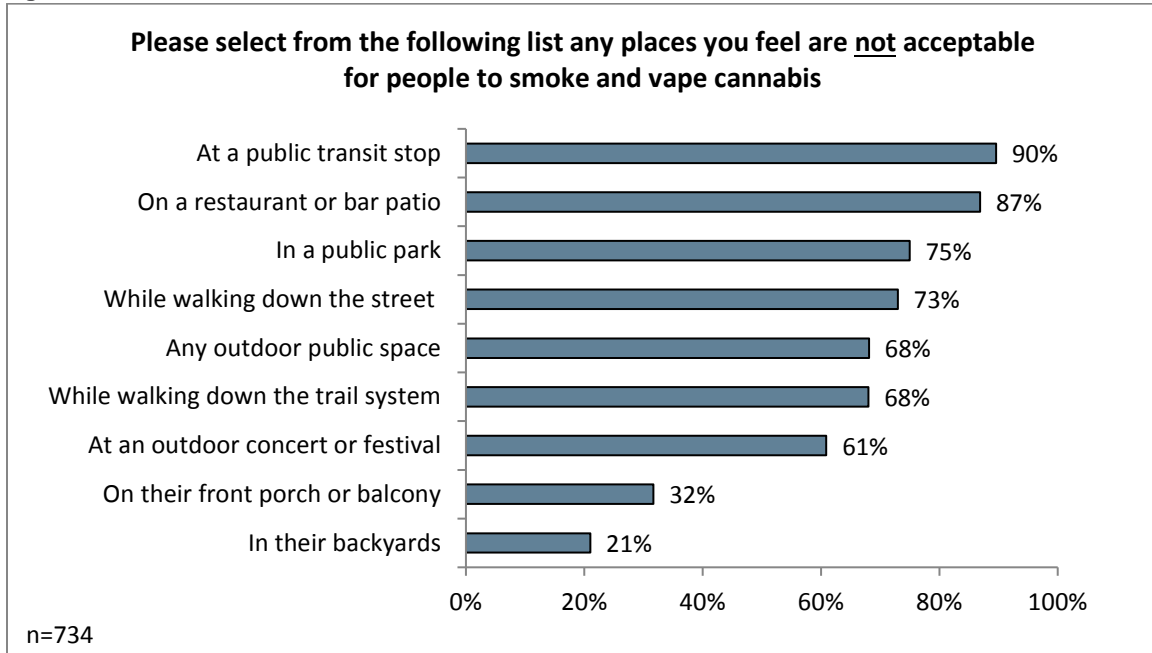
- On their front porch or balcony (66% versus 53% of those who do not work full or part-time);
- At an outdoor concert or festival (30% versus 19%);
- In a public park (20% versus 12%);
- While walking down the street (23% versus 12%);
- While walking down the trail system (27% versus 16%); and
- Any outdoor public space (13% versus 5%).

Those whose **total annual household income was \$100,000 to \$200,000** were significantly more likely to identify the following places as those they feel are **acceptable** for people to smoke and vape cannabis:

- On a restaurant or bar patio (10% versus 2% of those whose total annual household income was \$200,000 or greater);
- While walking down the street (24% versus 14% of those whose total annual household income was \$200,000 or greater); and
- While walking down the trail system (29% versus 14% of those whose total annual household income was \$200,000 or greater).

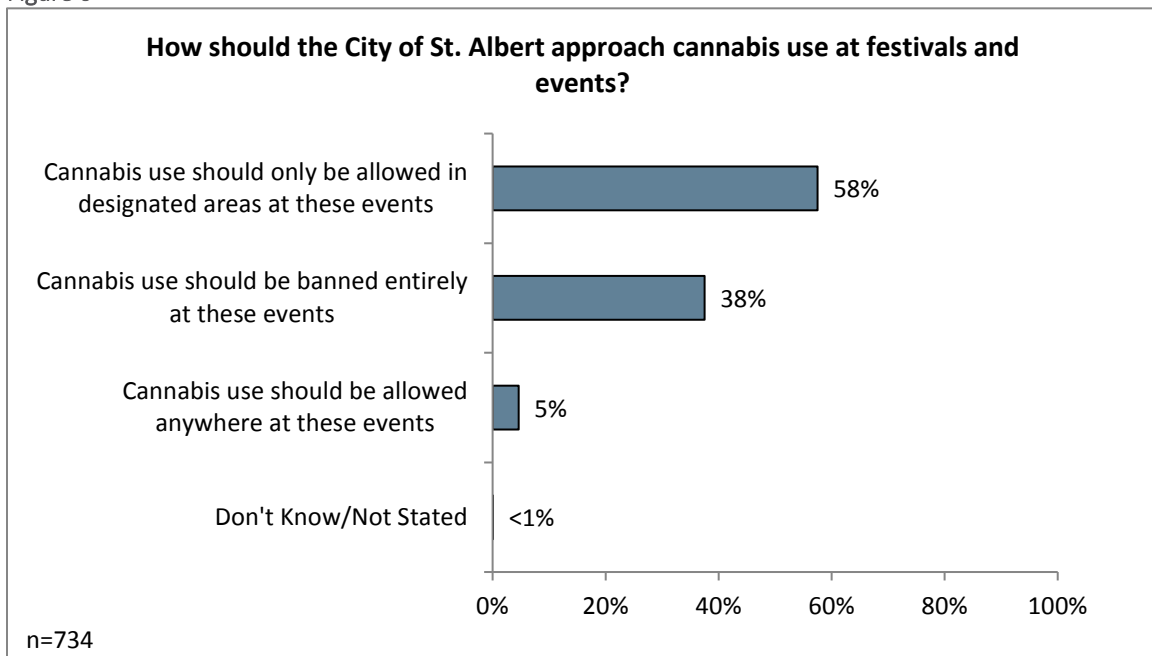
With regards to places they feel are *not* acceptable for smoking and vaping of cannabis, respondents again felt that people should not be able to do so at a public transit stop (90%) or on a restaurant or bar patio (87%). More than 7 in 10 respondents felt that residents should also not be able to smoke or vape in a public park (75%) or while walking down the street (73%).

Figure 5



More than half of the respondents (58%) felt that cannabis use should only be allowed in designated areas at festivals and events, while 38% felt that cannabis use should be banned entirely – see Figure 6, below.

Figure 6





Respondent Sub-Segment Analysis

Respondents significantly more likely to believe that cannabis use should be **banned entirely at festivals and events** included:

- Those ages 35 and older (38% to 41%) versus those ages 34 and younger (18%);
- Those who live in a single detached home (39%) versus those who live in a townhouse, duplex or four-plex (24%); and
- Those whose total annual household income was \$200,000 or greater (47%) versus those whose income was less than \$200,000 (30% to 32%).

Respondents significantly more likely to believe that cannabis use should **only be allowed in designated areas at festivals and events** included:

- Those ages 34 and younger (69%) versus those ages 35 to 54 (58%);
- Those who live in a townhouse, duplex or four-plex (72%) versus those who live in a single detached home (56%); and
- Those whose total annual household income was less than \$200,000 (63% to 66%) versus those whose income was \$200,000 or greater (47%).

Respondents significantly more likely to believe that cannabis use should be **allowed anywhere at festivals and events** included:

- Those ages 34 and younger (12%) versus those ages 35 and older (3% to 4%); and
- Those who rent their home (12%) versus those who own (4%).

In terms of overall concerns about public consumption, 72% were concerned (ratings of 4 or 5 out of 5) with regards to the smoke from public consumption, while approximately two-thirds each were concerned with odours (68%) and public smoking and vaping, in general (67%).

Figure 7

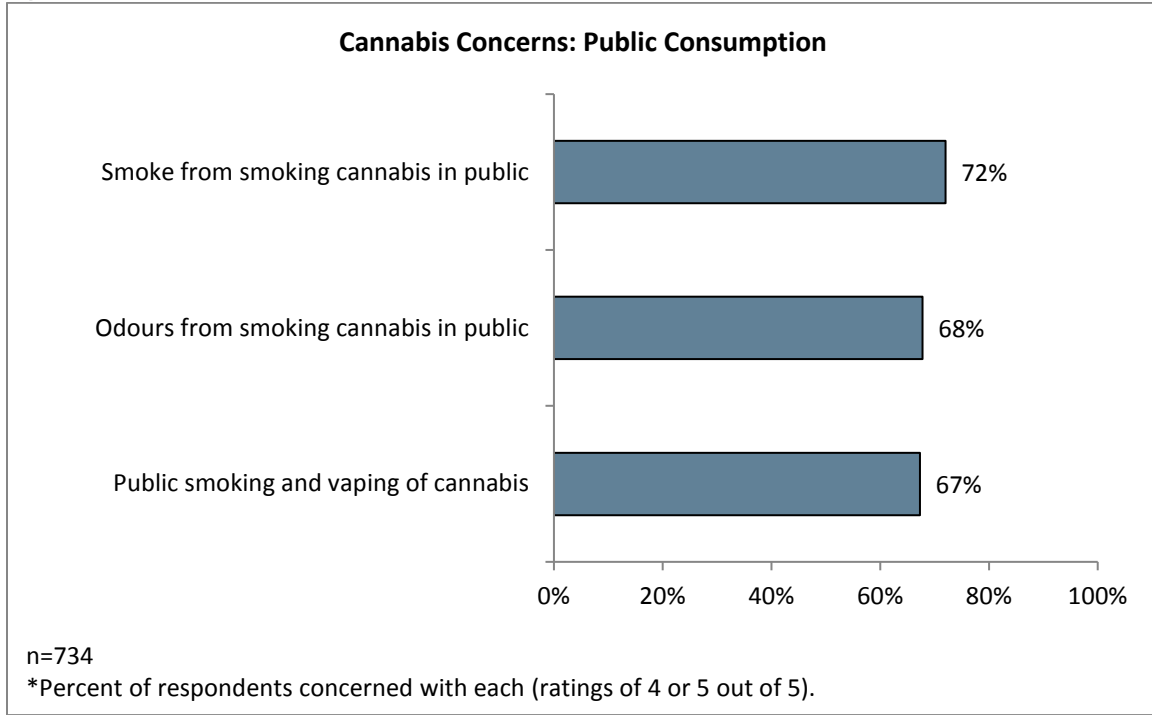


Table 4

Overall, how concerned are you about each of the following, regarding the consumption of cannabis?							
	Percent of Respondents (n=734)						
	(1) Not at all Concerned	(2)	(3)	(4)	(5) Very Concerned	Don't Know/ Not Stated	Mean (out of 5)
Smoke from smoking cannabis in public	11	7	9	16	56	1	4.00
Odours from smoking cannabis in public	14	8	11	14	54	<1	3.87
Public smoking and vaping of cannabis	12	8	12	16	51	-	3.85



Respondent Sub-Segment Analysis

Respondents significantly more likely to be concerned with **all three potential issues regarding the consumption of cannabis** included:

- Those who oppose cannabis legalization, or were neutral versus those who support it;
- Those ages 35 and older versus those 34 and younger;
- Those who do not work full or part-time versus those who are employed full or part-time; and
- Those whose total annual household income is \$200,000 or greater versus those whose household income is less than \$200,000.

Respondents significantly more likely to be concerned with **odours from smoking cannabis in public** included:

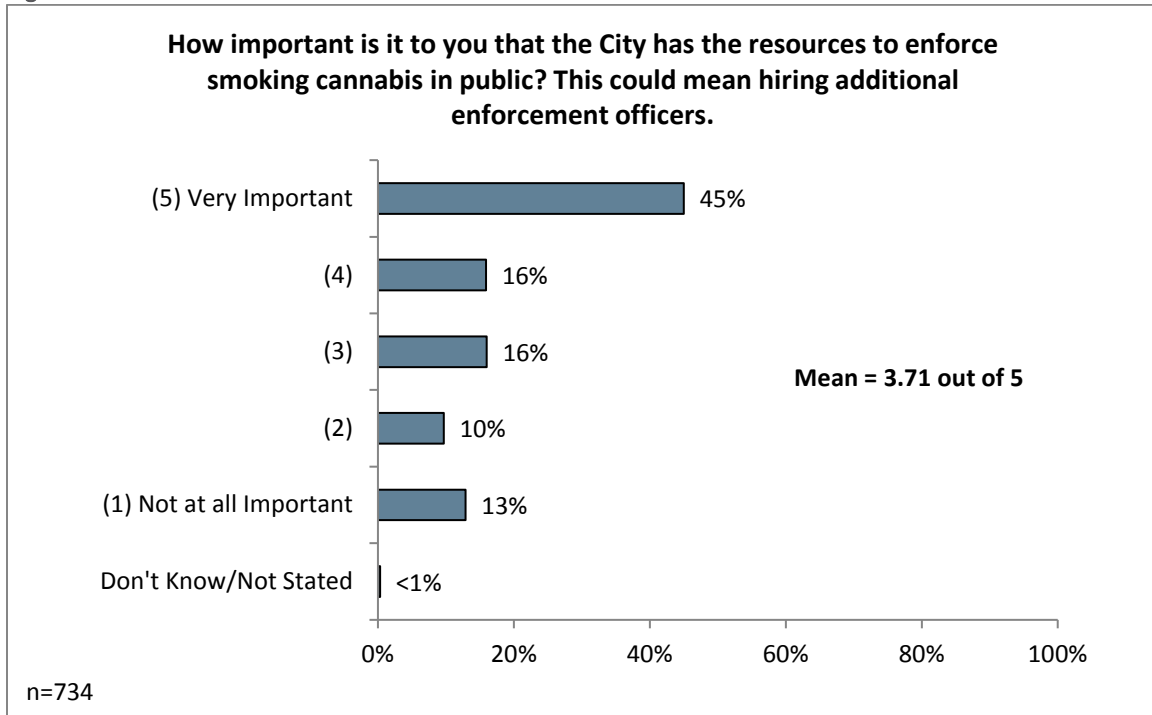
- Those who have lived in St. Albert for more than 10 years (69%) versus those who have lived in St. Albert for 5 years or less (59%); and
- Those whose highest level of education is university or college (69%) or post-graduate studies (70%) versus those whose highest level is high school or less (56%).

Respondents significantly more likely to be concerned with **smoke from smoking cannabis in public** included:

- Females (76%) versus males (67%); and
- Those who have lived in St. Albert for more than 10 years (73%) versus those who have lived in St. Albert for 5 years or less (63%).

As shown in Figure 8, about 6 in 10 respondents (61%) felt it was important (ratings of 4 or 5 out of 5) that the City has sufficient resources to enforce smoking cannabis in public, which could mean hiring additional enforcement officers.

Figure 8



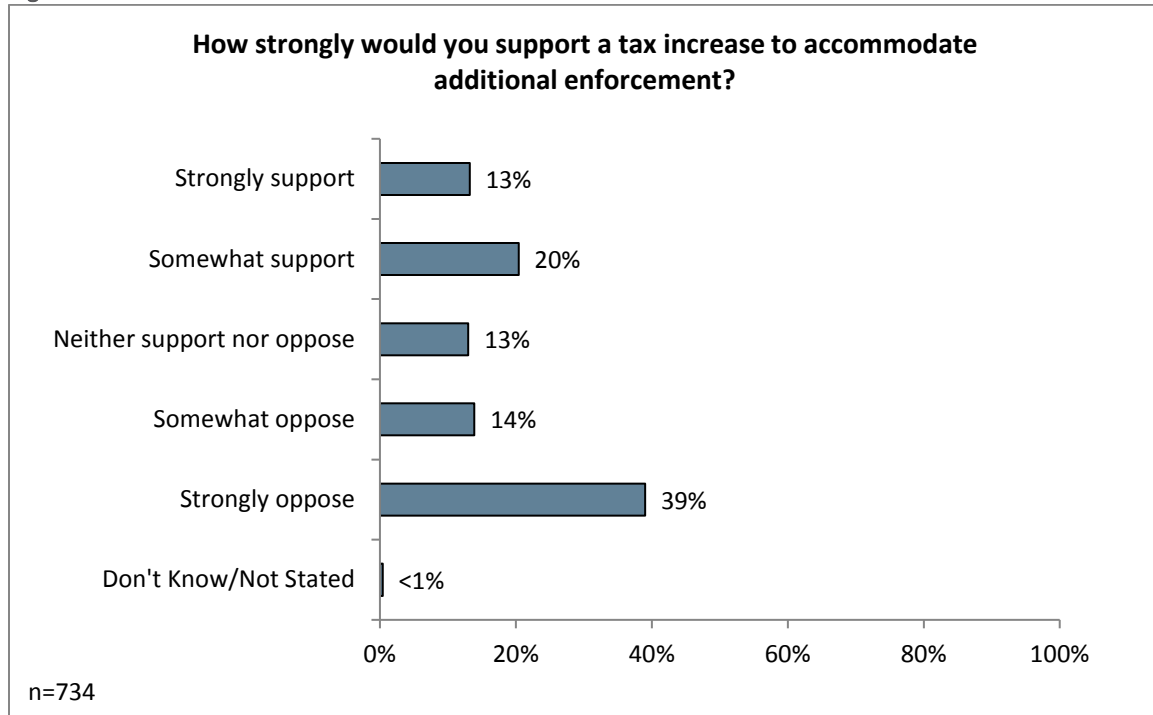
Respondent Sub-Segment Analysis

Respondents significantly *more likely* to indicate that it was **important for the City to have the resources to enforce smoking cannabis in public** included:

- Those ages 35 and older (64% to 66%) versus those ages 34 and younger (31%);
- Those who do not work full or part-time (67%) versus those who are employed full or part-time (57%); and
- Those whose total annual household income was \$200,000 or greater (67%) versus those whose household income was \$100,000 to less than \$200,000 (54%).

When asked how strongly they would support a tax increase to accommodate additional enforcement, however, more than half of the respondents (52%) were somewhat or strongly opposed, while approximately one-third (34%) somewhat or strongly supported this proposal.

Figure 9



Respondent Sub-Segment Analysis

Respondents significantly *more likely* to **support a tax increase** included:

- Those ages 35 and older (34% to 40%) versus those ages 34 and younger (15%);
- Females (40%) versus males (28%);
- Those whose highest level of education is university or college (37%) versus those whose highest level is high school or less (23%);
- Those who do not work full or part-time (38%) versus those who are employed full or part-time (31%); and
- Those whose total annual household income was \$200,000 or greater (49%) versus those whose income was less than \$200,000 (30% to 33%).

3.4 Business Regulations

Next, respondents were provided the following information regarding cannabis retail store operations:

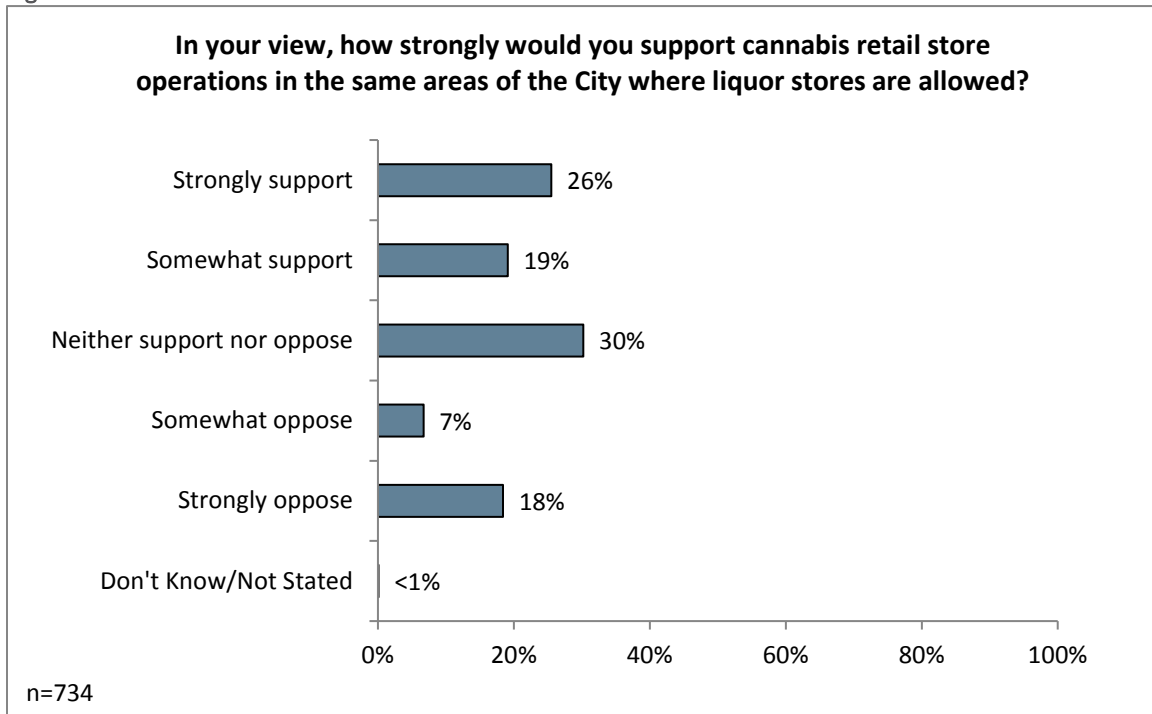
Adults who are 18 years of age or older will be able to buy cannabis from future cannabis retail stores in St. Albert. Cannabis will be sold in specialty cannabis-only retail stores, which will not be allowed to sell alcohol, tobacco or pharmaceuticals.

The provincial government will implement a minimum separation distance of 100 m between cannabis stores and schools and provincial health care facilities such as hospitals.

The City can be more or less restrictive for separation distances between cannabis stores and schools and hospitals and any other uses. The City can also require separation distances between cannabis stores, which the province has not imposed.

Given this information, respondents were then asked how strongly they would support cannabis retail store operations in the same areas of the City where liquor stores are allowed. Over 4 in 10 respondents (45%) were in support of allowing this, while one-quarter (25%) were not. Thirty percent (30%) neither supported nor opposed this proposal.

Figure 10



Respondent Sub-Segment Analysis

Respondents significantly *more likely* to **support cannabis retail store operations in the same areas of the City where liquor stores are allowed** included:

- Those ages 34 and younger (64%) versus those ages 35 and older (40% to 45%);
- Males (50%) versus females (39%);
- Those who are employed full or part-time (51%) versus those who do not work full or part-time (34%); and
- Those whose total annual household income was \$100,000 to less than \$200,000 (56%) versus those whose income was less than \$100,000 (43%) or \$200,000 or greater (43%).

Respondents were provided with a series of different types of locations, and were asked what they felt would be appropriate in terms of minimum distance regulations from cannabis retail stores. As shown in Table 5, more than 7 in 10 respondents felt that a minimum distance of 200 metres would be appropriate for places where children and youth gather (77%) and public facilities, such as community and recreation centres, skateparks, and water play parks (69%). Just under half of the respondents felt that there should be a minimum separation distance of more than 200 m from churches (48%).

Conversely, respondents did not feel that minimum separation distances were required for other cannabis retail stores (43%), liquor stores (48%), and stores selling tobacco products (50%).

Table 5

What distance regulations from cannabis retail stores do you believe would be appropriate for each of the following?						
	Percent of Respondents (n=734)					
	75 m (about half a block)	100 m (about one block)	200 m (about two blocks)	More than 200 m	I do not think there needs to be a minimum separation distance	Don't Know/ Not Stated
Other cannabis retail stores	4	6	9	34	43	4
Where children and youth gather	1	8	8	77	4	2
Public facilities	3	9	11	69	7	2
Churches	5	8	9	48	28	3
Liquor stores	12	8	8	22	48	3
Stores selling tobacco products	14	7	6	21	50	2

Respondent Sub-Segment Analysis

In general, those who supported cannabis legalization and those 34 and younger were significantly more likely to believe that there **does not need to be a minimum separation distance** between cannabis retail stores and other areas, versus those over the age of 35, and those who opposed cannabis legalization.

Females (39%) were significantly more likely than males (30%) to believe there should be **more than 200 metres between a cannabis retail store and other cannabis retail stores**.

Respondents significantly more likely to believe there should be **more than 200 metres between a cannabis retail store and where children and youth gather** included:

- Females (83%) versus males (72%); and
- Those whose total annual household income was \$200,000 or greater (85%) versus those whose income was \$100,000 to less than \$200,000 (71%).

Respondents significantly more likely to believe there should be **more than 200 metres between a cannabis retail store and public facilities** included:

- Females (74%) versus males (65%);
- Those who have lived in St. Albert for 6 to 10 years (77%) versus those who have lived in St. Albert for 5 years or less (62%); and
- Those whose total annual household income was \$200,000 or greater (79%) versus those whose income was less than \$200,000 (62% to 68%).

Respondents significantly more likely to believe there should be **more than 200 metres between a cannabis retail store and churches** included:

- Females (53%) versus males (44%);
- Those who do not work full or part-time (55%) versus those who are employed full or part-time (44%); and
- Those whose total annual household income was less than \$100,000 (51%) versus those whose income was \$100,000 to less than \$200,000 (41%).

Those who do not work full or part-time (28%) were significantly more likely to believe there should be **more than 200 metres between a cannabis retail store and liquor stores** versus those who are employed full or part-time (19%).

In terms of operating hours, 6 in 10 respondents (61%) felt that cannabis stores in St. Albert should have the same operating hours as liquor stores – 10 am to 2 am, seven days a week, as regulated by the Province of Alberta.

Those who felt that St. Albert should have something other than the same or shorter hours as liquor stores (n=49) most often explained that they were against the operation of retail cannabis stores in St. Albert, in general (6%).

Figure 11



Respondent Sub-Segment Analysis

Respondents significantly more likely to believe that cannabis retail stores operating in St. Albert should have **the same operating hours as liquor stores** included:

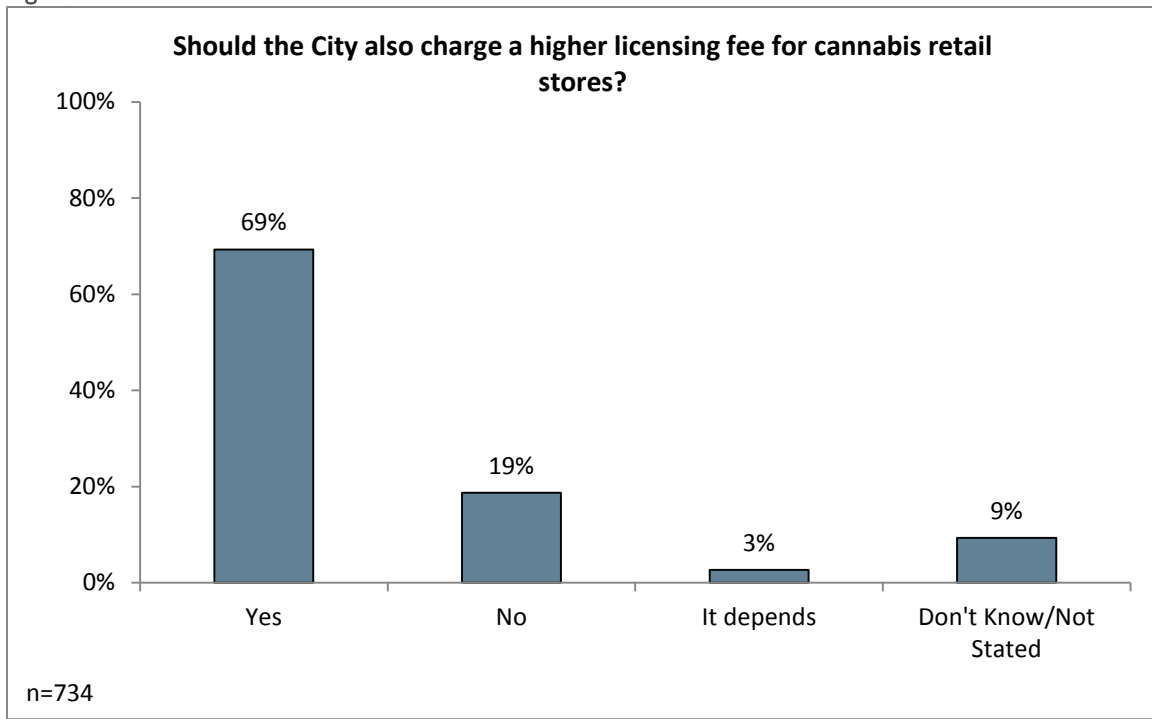
- Those ages 34 and younger (79%) versus those ages 35 and older (56% to 63%);
- Males (66%) versus females (56%);
- Those who are employed full or part-time (67%) versus those who do not work full or part-time (51%); and
- Those whose total annual household income was \$100,000 or greater (66% to 72% versus those whose income was less than \$100,000 (56%).

Currently, the City charges \$140.76 for a business license in order to operate a retail business in St. Albert. Only retail businesses that sell tobacco products are required to pay a higher licensing fee. Given this information, about 7 in 10 respondents (69%) reported that the City should also charge a higher licensing fee for cannabis retail stores – 19% of the respondents indicated that the City should not.

Respondents who felt that determining the appropriate licensing fee would depend on additional factors (n=20) most often stated the following:

- That they are against the operation of retail cannabis stores in St. Albert, in general (1%); and
- That it depends on how the City would use any additional funds (1%).

Figure 12



Respondent Sub-Segment Analysis

Respondents significantly more likely to believe the **City should charge a higher licensing fee for cannabis retail stores** included:

- Those ages 35 and older (68% to 69%) versus those ages 34 and younger (55%); and
- Females (73%) versus males (62%).

With regards to retail operations, more than 80% were concerned about how close cannabis stores will be to places where children and youth gather (e.g., schools, community centres, parks, and playgrounds), while approximately half were concerned about the location of cannabis stores (57%), the operation of cannabis stores (49%), and cannabis store signage and advertising (47%).

See Table 6 for the detailed breakdown of responses.

Figure 13

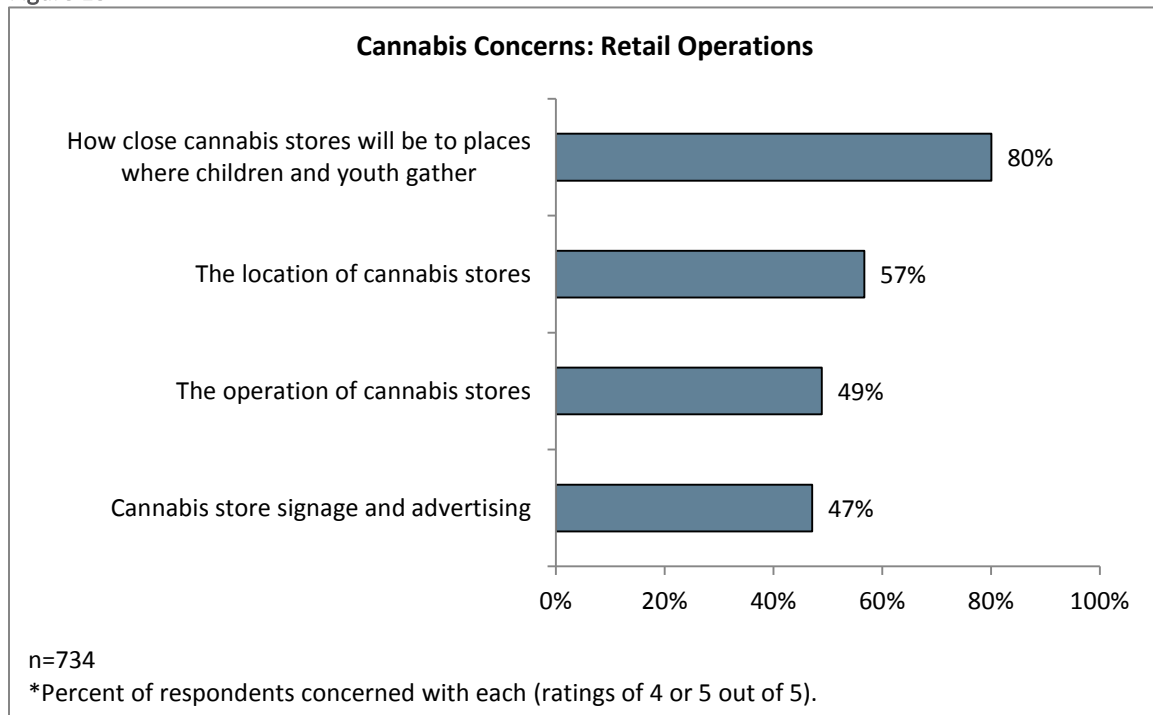


Table 6

Overall, how concerned are you about each of the following, regarding retail cannabis business operations?							
	Percent of Respondents (n=734)						Mean (out of 5)
	(1) Not at all Concerned	(2)	(3)	(4)	(5) Very Concerned	Don't Know/ Not Stated	
How close cannabis stores will be to places where children and youth gather	6	5	9	14	66	<1	4.31
The location of cannabis stores	17	11	16	16	41	<1	3.54
The operation of cannabis stores	20	11	19	16	33	1	3.30
Cannabis store signage and advertising	20	11	20	16	32	1	3.27



Respondent Sub-Segment Analysis

Respondents significantly more likely to be concerned with **all of the above aspects regarding retail cannabis business operations** included:

- Those who opposed cannabis legalization or were neutral, versus those who supported cannabis legalization;
- Those ages 35 and older versus those 34 and younger; and
- Those who do not work full or part-time versus those who are employed full or part-time.

Respondents significantly more likely to be concerned with the **location of cannabis stores** included:

- Those who have lived in St. Albert for more than 6 years (58% to 61%) versus those who have lived in St. Albert for 5 years or less (42%); and
- Those whose total annual household income was \$200,000 or greater (61%) versus those whose income was \$100,000 to less than \$200,000 (48%).

Those whose total annual household income was less than \$100,000 (49%) were significantly more likely to be concerned with the **operation of cannabis stores** versus those whose household income was \$100,000 to less than \$200,000 (39%).

Respondents significantly more likely to be concerned with **how close cannabis stores will be to places where children and youth gather** included:

- Females (83%) versus males (77%); and
- Those whose total annual household income was \$200,000 or greater (85%) versus those whose income was \$100,000 to less than \$200,000 (73%).

One in 5 respondents (20% or n=148) indicated additional concerns regarding retail cannabis operations. These most often included: that they are against the operation of cannabis retail stores, in general (28% of those with concerns); concerns with the cost to the City and/or potential tax increases (16%); and concerns about underage access or exposure to cannabis (16%).

Table 7

Do you have any other concerns regarding retail cannabis business operations?	
Base: Respondents with concerns.	Percent of Respondents* (n=148)
Am against the operation of retail cannabis stores in St. Albert	28
Concerns with costs to the City/tax increases	16
Underage access/exposure to cannabis related products/selling cannabis to minors	16
The number/amount of cannabis stores located in the City	13
Theft/shoplifting/breaking and entering at cannabis retail stores	7
Cannabis retail store employment requirements/qualifications/properly trained staff	5
Public smoking and vaping of cannabis	5
Cost of retail cannabis products	3
Will draw unsavoury/undesirable people to areas where cannabis stores are located	3
Increase in crime/crime rates	3
Other (2% of respondents or less)	12

*Multiple responses

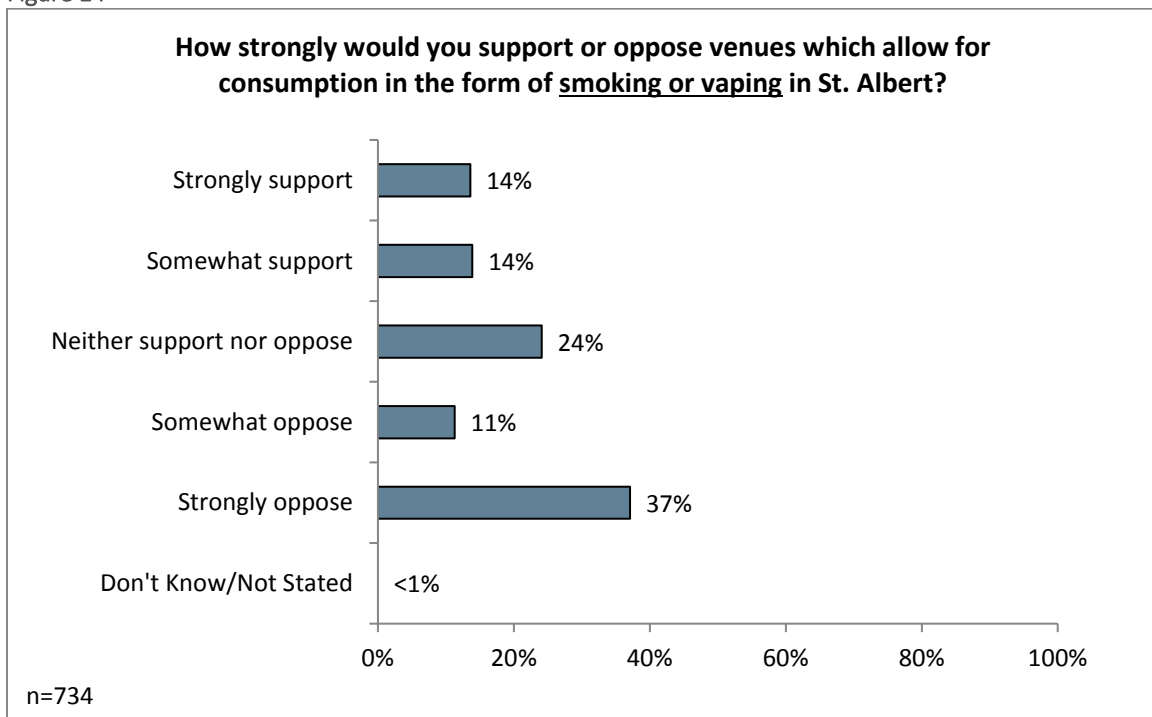
3.5 Venues for Consumption

Regarding cannabis consumption in public venues, respondents were provided with the following information:

Initially, venues specific for consuming cannabis will not be permitted. The Government of Alberta has the authority to license these types of establishments in the future, and this issue will be re-explored once the system for cannabis is established and guidelines for edible cannabis products have been set by the federal government.

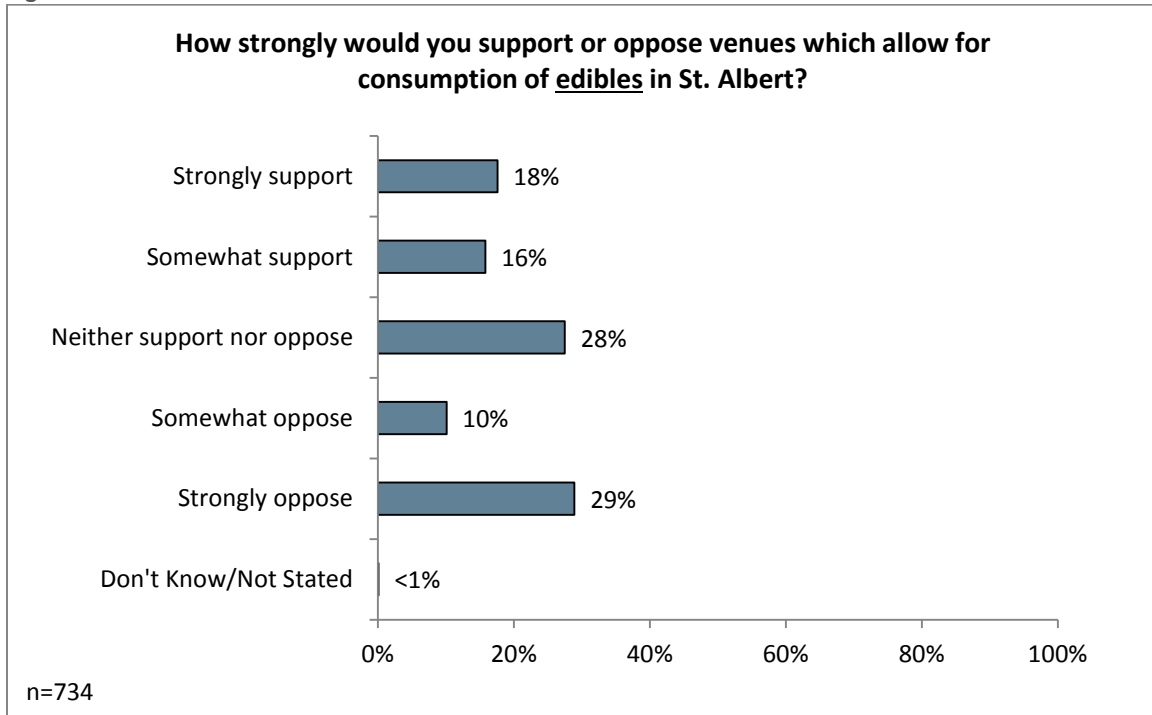
Given that provincial regulations may eventually allow consumption venues, respondents were asked how strongly they would support venues for smoking or vaping in St. Albert: over one-quarter (28%) somewhat or strongly supported this, while nearly half (48%) somewhat or strongly opposed. Twenty-four percent (24%) felt neutral.

Figure 14



With regards to edibles (food products that contain cannabinoids, such as baked goods, liquids, butters, tinctures, and candy), one-third (33%) supported the idea of venues allowing the consumption of edibles in St. Albert, should it be legalized by the federal government. Conversely, 39% opposed this, and 28% felt neutral.

Figure 15



Respondent Sub-Segment Analysis

Those who are employed full or part-time were significantly *more likely* to support venues which allow consumption in the form of smoking or vaping in St. Albert (32%) and venues which allow for consumption of edibles in St. Albert (38%) versus those who do not work full or part-time (20% and 26%, respectively).

3.6 Home Growing & Production Facilities

In the next section of the survey, respondents were asked about their opinions on the growth and production of cannabis. First, respondents were provided the following information regarding home growing:

Federal laws will allow St. Albert residents to grow a maximum of four plants per household. The Government of Alberta has indicated that it will align with the federal government's decision but will restrict growing to indoors. Growing cannabis plants outdoors will not be allowed.

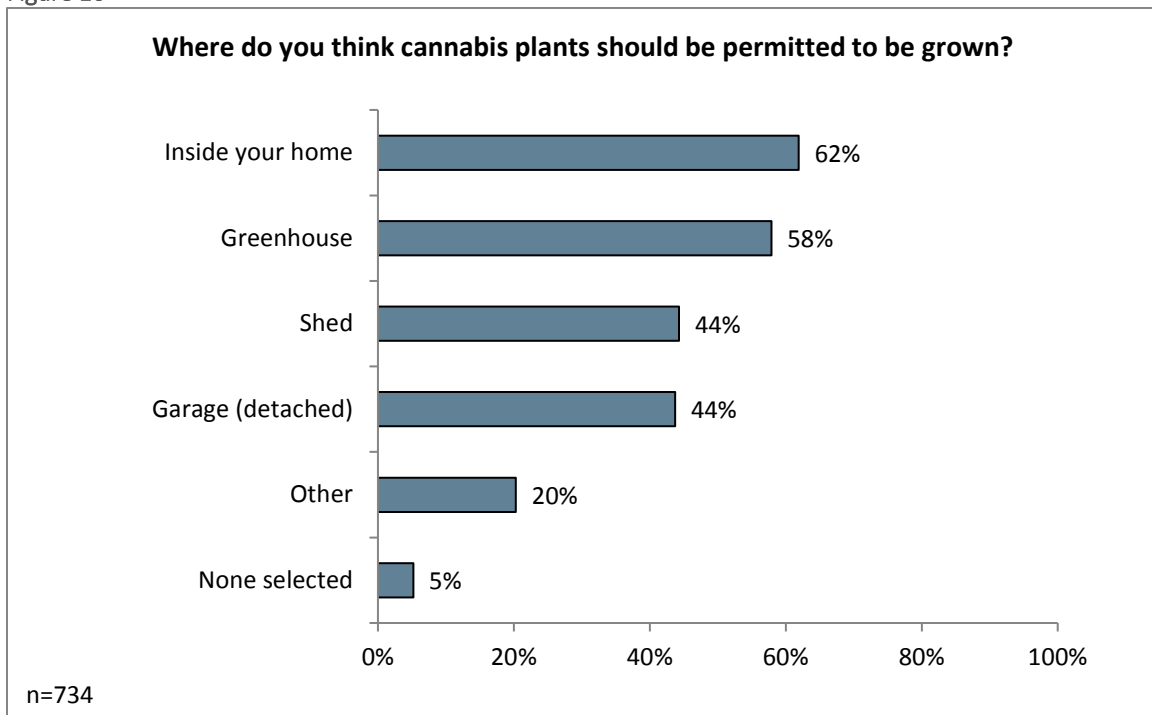
The Government of Alberta has also indicated that renters, condo-dwellers and those who live in multi-family dwellings may be restricted from growing cannabis in their homes based on rules established in rental agreements or condominium bylaws.

Given this information, respondents were asked where they felt cannabis plants should be permitted to be grown. As shown below, approximately 6 in 10 respondents reported that cannabis should be permitted to be grown inside ones' home (62%) or in a greenhouse (58%).

'Other' responses most often included:

- Nowhere – i.e., cannabis should not be permitted to be legally grown in the City (8%);
- In a licensed or government-regulated production facility (6%); and
- Outside or outdoors (e.g., in a garden or backyard) (4%).

Figure 16



Respondent Sub-Segment Analysis

Those who are employed full or part-time were significantly more likely to believe that **cannabis plants should be permitted to grow in the following areas**, versus those who do not work full or part-time:

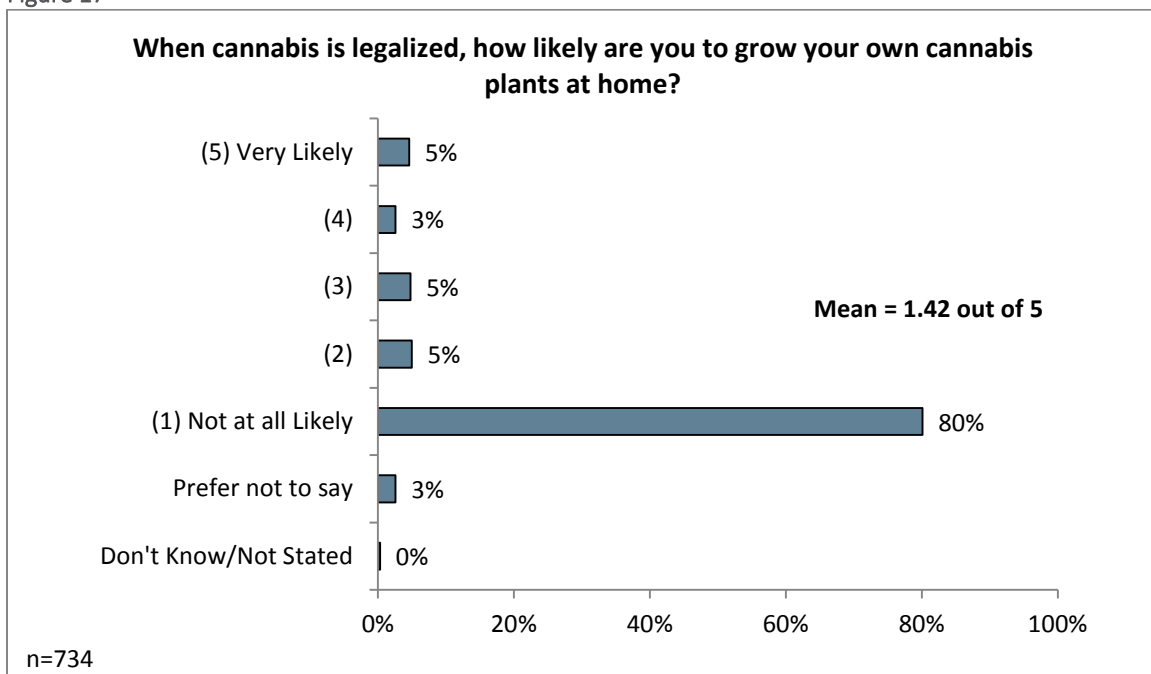
- Inside your home (67% versus 51%);
- In a shed (48% versus 38%);
- In a greenhouse (61% versus 51%); and
- In a detached garage (58% versus 37%).

Respondents significantly more likely to believe that cannabis plants should be permitted to grow **inside your home**, in particular, included:

- Those ages 35 to 54 (64%) versus those ages 55 and older (55%); and
- Males (66%) versus females (57%).

Seven percent (7%) indicated that they would be likely (ratings of 4 or 5 out of 5) to grow their own cannabis plants at home once legalized – the majority (85%) being unlikely to do so.

Figure 17



Respondent Sub-Segment Analysis

Respondents significantly more likely to be likely to **grow their own cannabis plant at home** included:

- Those ages 34 and younger (21%) versus those ages 35 and older (5% to 7%);
- Males (9%) versus females (5%); and
- Those whose highest level of education is high school or less (11%) versus those whose highest level is post graduate (4%).

In terms of home growing, 59% of the respondents were concerned about dealing with neighbours who grow or smoke cannabis, while 44% were concerned about the safety of growing cannabis plants in the home.

See Table 8 for detailed results.

Figure 18

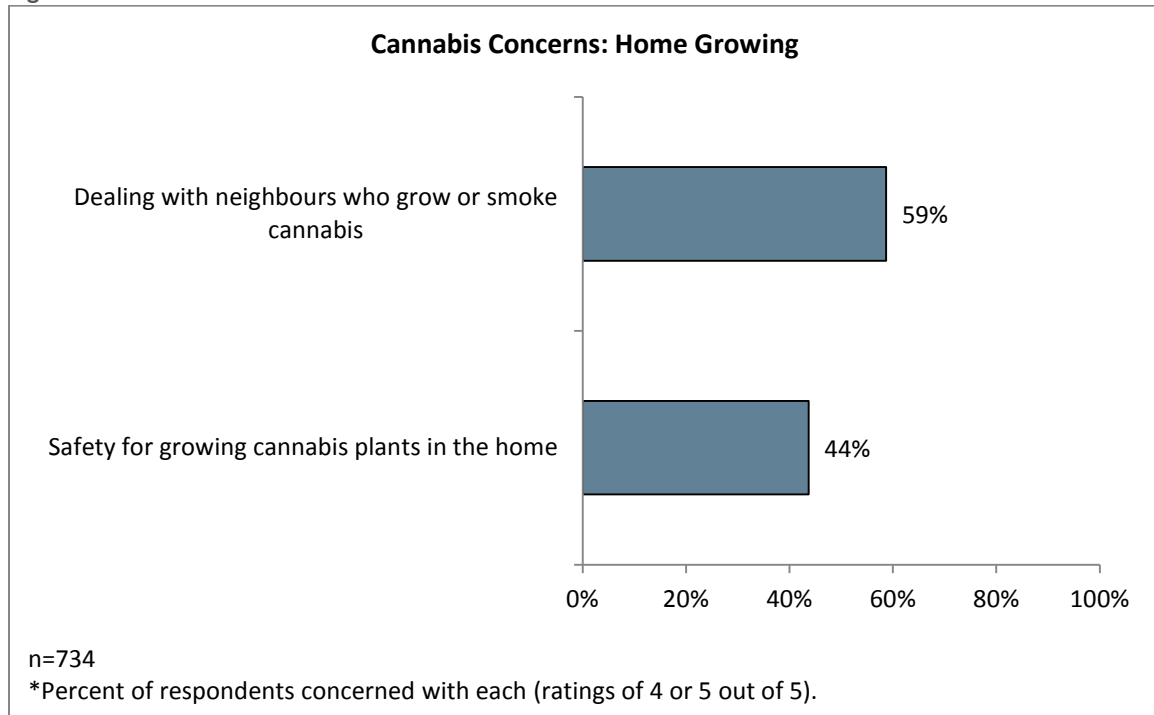


Table 8

Overall, how concerned are you about each of the following, regarding home growing?							
	Percent of Respondents (n=734)						
	(1) Not at all Concerned	(2)	(3)	(4)	(5) Very Concerned	Don't Know/ Not Stated	Mean (out of 5)
Dealing with neighbours who grow or smoke cannabis	23	7	10	14	44	1	3.49
Safety for growing cannabis plants in the home	30	11	14	13	31	1	3.04

Respondent Sub-Segment Analysis

Respondents significantly *more likely* to be **concerned with both the safety for growing cannabis plants in the home and dealing with neighbours who grow or smoke cannabis** included:

- Those who opposed cannabis legalization or were neutral versus those who supported it;
- Those 35 and older versus those 34 and younger;
- Those who did not work full or part-time versus those who are employed full or part-time; and
- Those whose total annual household income was less than \$100,000 versus those whose income was \$100,000 to less than \$200,000.

Those whose total annual household income was \$200,000 or greater (64%) were significantly *more likely* to be concerned, in particular, with **dealing with neighbours who grow or smoke cannabis** versus those whose income was \$100,000 to less than \$200,000 (51%).

With regards to production facilities, more than half (57%) were concerned about odours, while approximately 4 in 10 respondents (41%) were concerned about fire safety.

See Table 9 for detailed results.

Figure 19

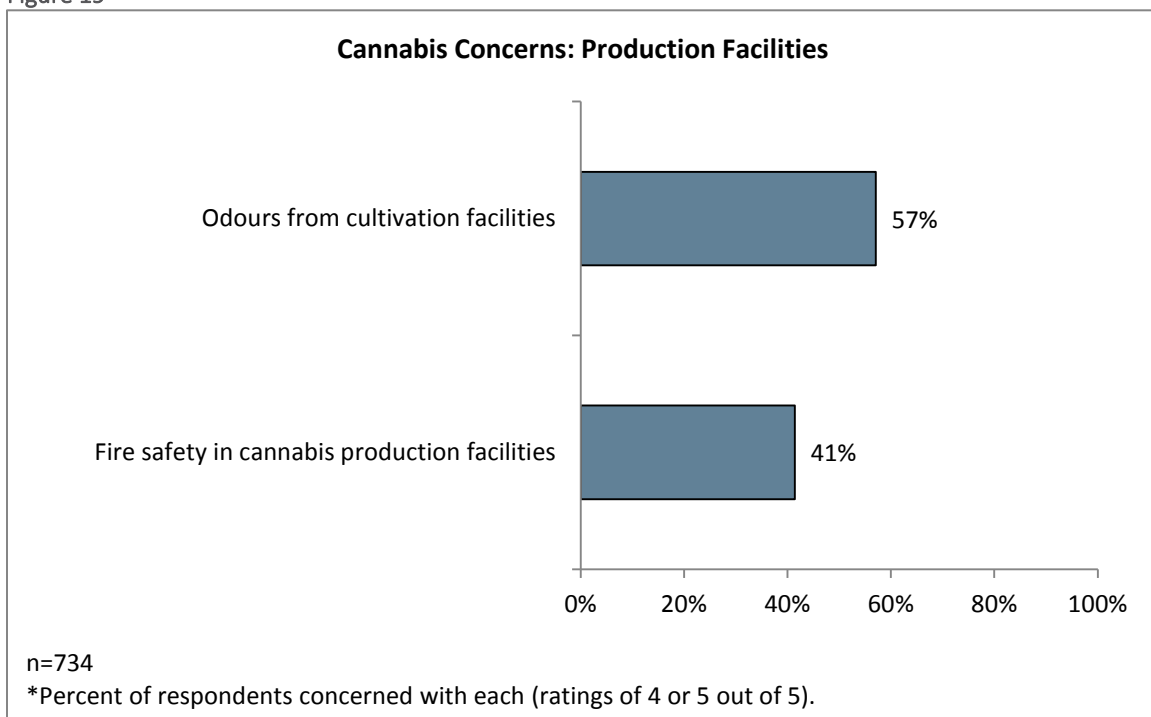


Table 9

Overall, how concerned are you about each of the following, regarding the cultivation of cannabis in production facilities?							
	Percent of Respondents (n=734)						
	(1) Not at all Concerned	(2)	(3)	(4)	(5) Very Concerned	Don't Know/ Not Stated	Mean (out of 5)
Fire safety in cannabis production facilities	30	10	17	14	28	1	2.99
Odours from cultivation facilities	20	10	13	16	41	<1	3.49

Respondent Sub-Segment Analysis

Respondents significantly more likely to be concerned with **fire safety in cannabis production facilities** included:

- Those with children in their household (47%) versus those without children (39%);
- Those who rent their home (57%) versus those who own (40%);
- Those who live in a home other than a single detached, townhouse, duplex, or four-plex (60%) versus those who live in a single detached home (40%) or duplex, townhouse, or four-plex (41%); and
- Those whose total annual household income was less than \$100,000 (46%) versus those whose income was \$100,000 to less than \$200,000 (32%).

Respondents significantly more likely to be concerned with **odours from cultivation facilities** included:

- Those ages 35 and older (59% to 60%) versus those ages 34 and younger (40%);
- Those who live in a single detached home (58%) or a home other than a single detached, townhouse, duplex, or four-plex (63%) versus those who live in a duplex, townhouse, or four-plex (45%); and
- Those whose total annual household income was less than \$100,000 (58%) versus those whose income was \$100,000 to less than \$200,000 (49%).

3.7 Support for Legalization

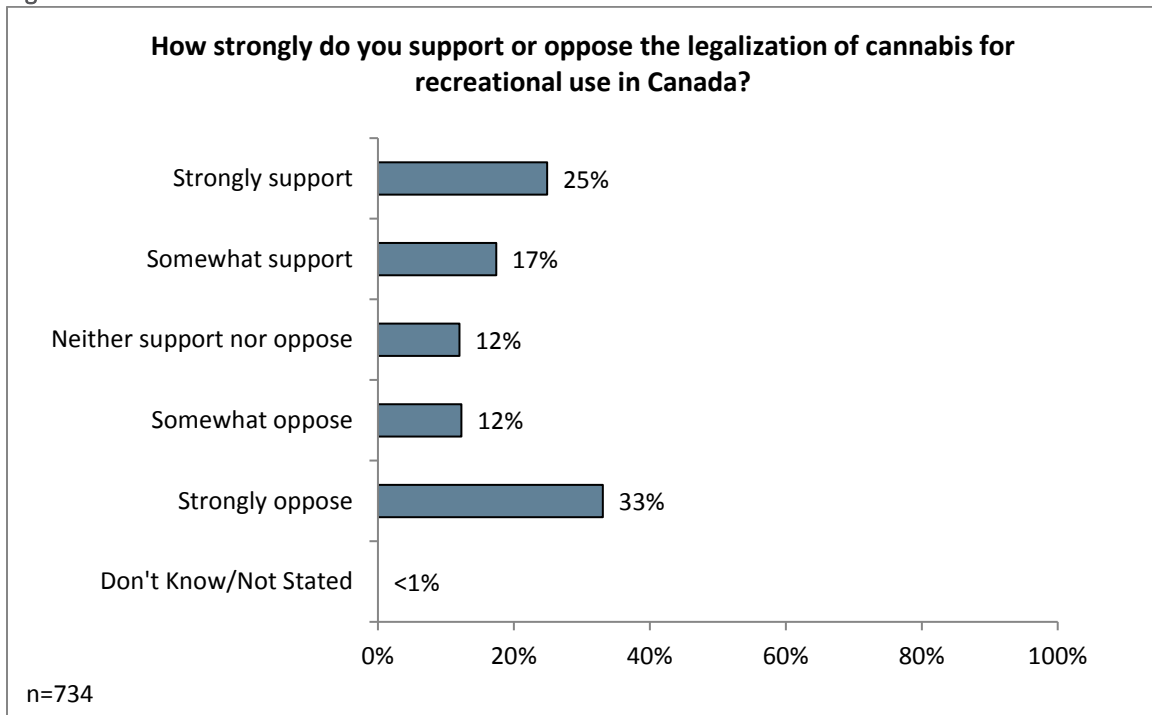
Respondents were provided with the following information, regarding some of the reasons for which the government is legalizing cannabis for recreational use:

The Federal Government has stated that one of the reasons for legalizing and regulating cannabis is to take cannabis out of the illegal, black market.

Legalizing cannabis will likely result in new jobs being created to produce, cultivate, distribute and sell cannabis products in St. Albert.

In consideration of this information, 42% of respondents, overall, supported the legalization of cannabis for recreational use in Canada. Twelve percent (12%) neither supported nor opposed, while 45% opposed the legalization of recreational cannabis.

Figure 20



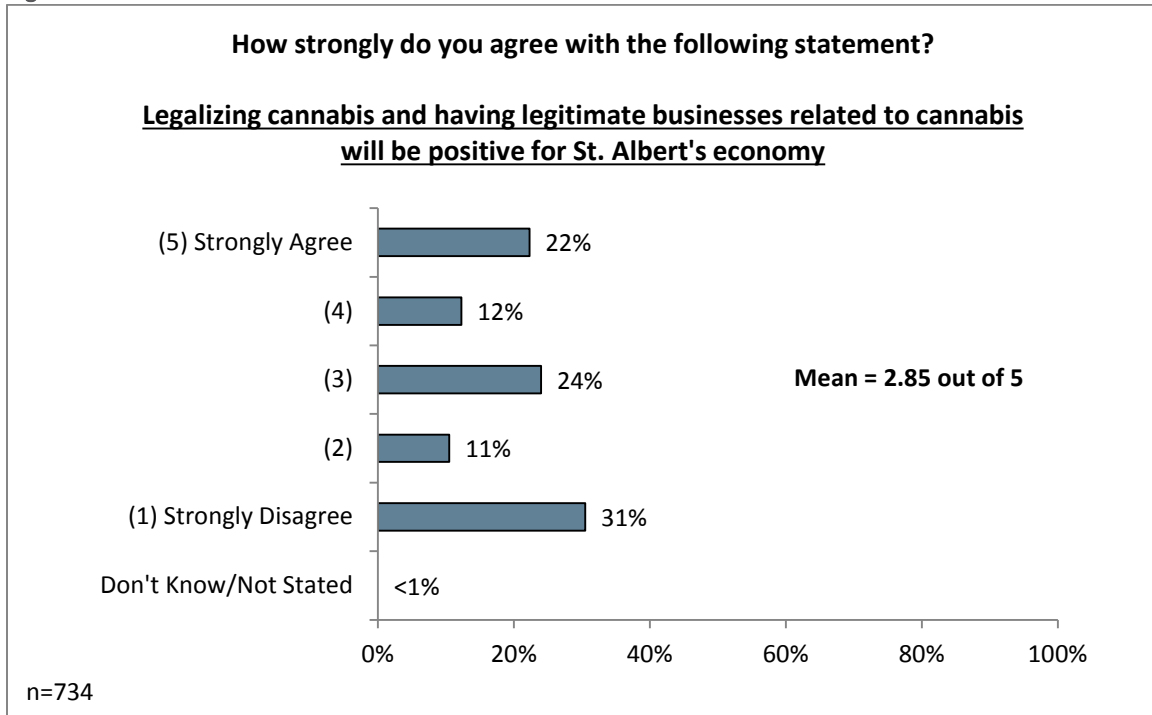
Respondent Sub-Segment Analysis

Respondents significantly more likely to **support the legalization of cannabis for recreational use in Canada** included:

- Those ages 34 and younger (70%) versus those ages 35 and older (39%); and
- Those who are employed full or part-time (46%) versus those who do not work full or part-time (36%).

Thinking in terms of the potential impact on the local economy, 35% agreed that “legalizing cannabis and having legitimate businesses related to cannabis will be positive for St. Albert’s economy.” Conversely, 41% disagreed, while 24% felt neutral.

Figure 21



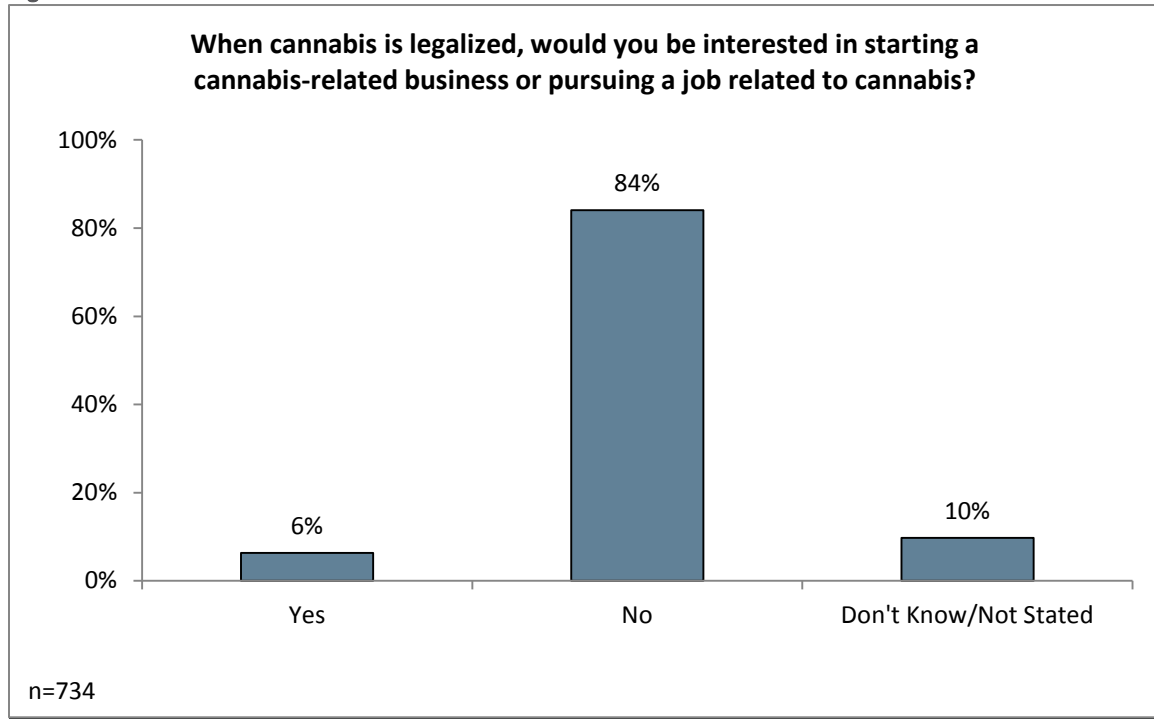
Respondent Sub-Segment Analysis

Respondents significantly *more likely* to agree with the statement “**legalizing cannabis and having legitimate businesses related to cannabis will be positive for St. Albert’s economy**” included:

- Those ages 34 and younger (74%) versus those ages 35 and older (29% to 30%);
- Males (40%) versus females (30%);
- Those who have lived in St. Albert for 5 years or less (44%) versus over 10 years (33%);
- Those who rent their home (55%) versus those who own (34%);
- Those who are employed full or part-time (38%) versus those who do not work full or part-time (29%); and
- Those whose total annual household income was less than \$200,000 (39% to 43%) versus those whose income was \$200,000 or greater (26%).

As shown in Figure 22, the majority of respondents (84%) did not have any interest in starting a cannabis-related business or pursuing a job related to cannabis, while 6% did.

Figure 22



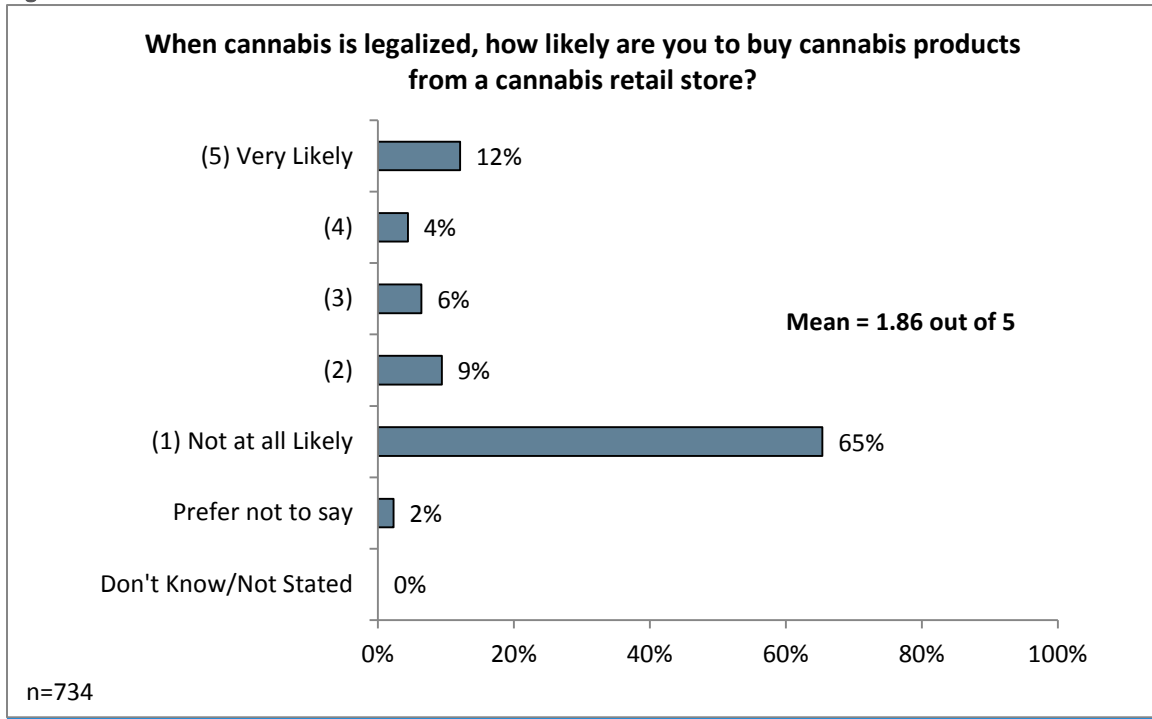
Respondent Sub-Segment Analysis

Respondents significantly *more likely* to be **interested in starting a cannabis related business or pursuing a job related to cannabis** included:

- Those ages 34 and younger (20%) versus those ages 35 and older (4% to 6%);
- Males (8%) versus females (4%);
- Those with children in their household (9%) versus those without (5%);
- Those who rent their home (19%) versus those who own (5%);
- Those who live in a duplex, townhouse, or four-plex (11%) or a home other than a single detached, townhouse, duplex, or four-plex (18%) versus those who live in a single detached home (4%); and
- Those whose highest level of education is high school or less (13%) versus those whose highest level is university or college (5%) or post-graduate studies (4%).

The majority of respondents indicated that they were personally unlikely (75%) to buy cannabis products from a retail store, with only 17% indicating they would be likely to (ratings of 4 or 5 out of 5).

Figure 23



Respondent Sub-Segment Analysis

Respondents significantly more likely to be likely to **buy cannabis products from a cannabis retail store** included:

- Those ages 34 and younger (41%) versus those ages 35 and older (12% to 14%);
- Males (21%) versus females (13%);
- Those who rent their home (31%) versus those who own (16%);
- Those whose highest level of education is high school or less (25%) versus those whose highest level is university or college (16%) or post-graduate studies (13%); and
- Those who are employed full or part-time (20%) versus those who do not work full or part-time (11%).

3.8 Final Comments

Finally, respondents were given the opportunity to provide any additional comments or suggestions for the City of St. Albert. One-third of the respondents (33% or n=243) provided additional responses, including: that they are against the legalization of cannabis, in general (16%); concerns about tax increases or the cost of legalization to the City of St. Albert (13%); suggestions that cannabis should be treated similarly to alcohol, for bylaw and regulation purposes (12%); and concerns about cannabis consumption in public (10%).

Table 10

Do you have any final comments or suggestions for the City of St. Albert regarding the topics in this survey?	
Base: Respondents with concerns.	Percent of Respondents* (n=243)
Against the legalization of cannabis, in general	16
Should not increase taxes/concerned about the cost of cannabis legalization	13
Cannabis laws/regulations should be treated the same as alcohol	12
Concerned about cannabis use/consumption in public	10
Provide public education with regards to consumption/proper consumption	8
Concerned about impaired driving/driving under the influence of cannabis	7
Concerned about the odours from smoking cannabis in public	7
Ensure that cannabis regulations/laws are closely monitored/inspected/enforced	7
Cannabis smoke/second hand smoke is a public health hazard	6
Concerned about the public health impacts of cannabis	5
Need to have regulations/enforceable measures put in place before/legalization	5
Other (4% of respondents or less)	36
Don't Know/Not Stated	<1

*Multiple responses

3.9 Demographics

Tables 11 through 13, below and continued on the following pages, present the demographic or profile data of those surveyed as part of the 2018 Cannabis Research.

Table 11: Respondent Demographics

	Percent of Respondents (n=734)
How old are you?	
17 or younger	<1
18 to 24 years old	2
25 to 34 years old	10
35 to 44 years old	15
45 to 54 years old	21
55 to 64 years old	29
65 to 74 years old	16
75 or older	6
Don't Know/Not Stated	1
Gender	
Male	51
Female	45
Other	<1
Prefer not to say	4
Don't Know/Not Stated	<1
How long have you lived in the City of St. Albert?	
Less than 1 year	3
1 to 5 years	11
6 to 10 years	11
11 to 20 years	21
Over 20 years	54
Don't Know/Not Stated	<1
Which of the following best describes your household composition?	
Married or cohabiting without children	40
Married or cohabiting with children under 18 years	26
More than 2 adults	14
Single person without children	12
Single person with children under 18 years	2
Prefer not to say	7
Do you own or rent your home?	
Own	92
Rent	6
Other	2
Don't Know/Not Stated	1

Table 12: Respondent Demographics (Cont'd)

	Percent of Respondents (n=734)
What type of home do you live in?	
Single detached home	81
Townhouse, duplex, or four-plex	10
Low-rise apartment or condo (4 stories or less)	7
Multi-family dwelling	1
High-rise apartment or condo (5 stories or more)	<1
Other	1
Don't Know/Not Stated	1
What is the highest level of education you have obtained?	
Completed college diploma or university degree	52
Some university or college	18
Post-graduate degree	16
Completed high school	12
Grade school or some high school	1
Don't Know/Not Stated	1
What is your current employment status?	
Working full-time, including self-employment	55
Retired	27
Working part-time, including self-employment	10
Homemaker	4
Student	2
Not employed	1
Permanently unable to work	<1
Don't Know/Not Stated	1
Where would you place your total household income, before taxes, for 2017?	
Less than \$60,000	9
\$60,000 to less than \$100,000	19
\$100,000 to less than \$125,000	12
\$125,000 to less than \$150,000	12
\$150,000 to less than \$200,000	11
\$200,000 or greater	12
Prefer not to say	24
Don't Know/Not Stated	1

Table 13: Business Demographics

Base: Business Owners/Managers	Percent of Respondents (n=31)
Is your business located within the City of St. Albert?	
Yes	58
No	36
Which of the following best describes your primary business?	
Business and Professional Services	26
Advertising and Media	10
Arts, Culture and Entertainment	10
Family, Community and Civic Organizations	7
Home and Garden	7
Cannabis Consulting and Retail	3
Construction Equipment and Contractors	3
Legal	3
Personal Services and Care	3
Religious Organizations	3
Restaurants, Food and Beverages	3
Don't Know/Not Stated	10
Which of the following best describes the style of your primary business location?	
Home-based business	55
Office building	13
Free standing building	10
Shopping mall - enclosed	7
Industrial/commercial units	3
Don't Know/Not Stated	13