

# Cannabis Retail Stores Study 2018

*Final Report*

**Prepared for City of Ottawa**

**Supplier: EKOS RESEARCH ASSOCIATES INC.**

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# TABLE OF CONTENTS

List of Tables	iv
List of Charts	iv
Summary	v
1. Introduction	1
1.1 Methodology	1
1.2 Demographic Characteristics	2
2. Findings	5
2.1 Anticipated Consumption within Social Circle	5
2.2 Anticipated Personal Consumption	6
2.3 Support for Legalization	7
2.4 Preferred Method of Purchase	8
2.5 Support for Retail Sale of Cannabis	9
2.6 Anticipated Impact on Accessibility	13
2.7 Concerns about Retail	14
2.8 Arguments for Retail	17

APPENDIX A: Survey Questionnaire

# LIST OF TABLES

- Table 1: Demographic Table
- Table 2: Reasons for Supporting Retail Sale of Cannabis
- Table 3: Reasons for Opposing Retail Sale of Cannabis

# LIST OF CHARTS

- Chart 1: Anticipated Consumption within Social Circle
- Chart 2: Anticipated Personal Consumption
- Chart 3: Support for Legalization
- Chart 4: Preferred Method of Purchase
- Chart 5: Support for Retail Sale of Cannabis
- Chart 6: Anticipated Impact on Accessibility
- Chart 7ab: Concerns about Retail
- Chart 8ab: Arguments for Retail

# SUMMARY

EKOS Research Associates Inc. was commissioned by the City of Ottawa to conduct a telephone survey of Ottawa residents on their views of whether or not cannabis retail stores should be located in Ottawa. A telephone survey was administered involving 803 Ottawa residents. Results are considered to be accurate to within 3.5 percentage points, 19 times out of 20. The questionnaire was available in English and French, and contained roughly 25 survey questions, taking an average of 10 minutes to complete.

About half of Ottawa residents – 53 per cent – support the federal government’s plan to legalize recreational cannabis use. Furthermore, three in 10 expect that a friend or family member will purchase cannabis for recreational use and one in eight intend to take advantage of the new laws themselves.

The matter of whether recreational cannabis should be sold locally in a retail store, however, elicits a somewhat more divided response. Ottawa residents support allowing retail stores to sell recreational cannabis by a narrow 48-to-43 margin. Among supporters of legalization 78 per cent support cannabis retail stores. Among those who oppose legalization only 10 per cent support retail stores and 83 are opposed to them. Approximately one in ten respondents have adopted a ‘not in my backyard’ stance – in other words, they support legalization, but not retail availability. Naturally, support for retail access is significantly higher among those who expect to purchase cannabis themselves or anticipate that a friend or family member will do so.

The vast majority of Ottawa residents agree that allowing the retail sale of recreational cannabis will improve accessibility, lead to better selection, and benefit Ottawa’s economy. Nevertheless, results reveal significant concerns about the perceived negative externalities when it comes to living near a retail outlet, particularly crime, access among minors, and smell. Those aged 65 and over and those who reside in the Kanata/Stittsville area are consistently more likely to express these concerns.

Regardless of the perceived consequences, cannabis users prefer shopping at a retail store over ordering online by a six-to-one margin.



# 1. INTRODUCTION

EKOS Research Associates Inc. was commissioned by the City of Ottawa to conduct a telephone survey of Ottawa residents regarding retail stores selling recreational cannabis. This report represents the findings of the survey. Details of the methodological approach are presented in this section, followed by sample characteristics. Findings are presented in Chapter Two. The final questionnaire is provided in Appendix A.

## 1.1 METHODOLOGY

A telephone survey was administered involving 803 Ottawa residents on whether to allow cannabis retail stores to be located in Ottawa. The data was collected using a random household, telephone survey with residents of the City of Ottawa. The margin of error associated with the total sample is +/- 3.5%, at a 95% confidence interval. This increases considerably, however, to six to nine per cent among more sub-group segments of the population. The sample approach involved random digit dial to ensure the inclusion of both listed and unlisted landline telephone numbers within the City of Ottawa. This was augmented through a sample containing cell phone only households based on rate centres within Ottawa, making up approximately 20 per cent of the sample contacted.

The survey was designed by the City of Ottawa and reviewed by EKOS Research for clarity and balance. The survey was programmed for administration in both English and French. Respondents could complete the survey in their official language of choice. The questionnaire contained roughly 25 survey questions (including two open end questions) and took an average of ten minutes to complete. The questionnaire was first tested by telephone and test results were monitored to ensure respondent comprehension and accuracy of data collection. The final questionnaire is presented in Appendix A. The survey was collected between October 24<sup>th</sup> and November 4<sup>th</sup>, 2018. The overall response rate is eight per cent (details can be found in Appendix B).

Survey results were weighted by age, sex, education and region, to be aligned with the distribution of the 2016 Census. Open ended responses were reviewed and coded, and banner tables were created to explore results by key characteristics (e.g., region, age, sex, education, and income).

## Note to readers

Overall results are presented in text, charts, and tables. Bulleted text is used to describe specific segments of the sample if they are statistically and substantively different from the overall results for the entire sample. Differences are reported when significant at the .05 level or better, using statistical testing<sup>1</sup>. No differences are reported for fewer than 50 respondents representing a sub-group. If differences are not noted in the report it can be assumed that they are either not statistically significant in their variation from the overall result or that the difference was judged to be too small to be noteworthy, or represented by too small a sample to be reliable.

Readers should note that results for the proportion of respondents in the sample that either said “don’t know” or did not provide a response may not be indicated in the graphic representation of the results. Results may also not total to 100 per cent due to rounding.

Throughout the discussion of findings, reference is made to recent consumers or users of cannabis, which describes those who have used or tried it within the last 12 months. Reference is also made to parents, which described parents of at least one child between the ages of 13 and 24. “Younger residents” refers to those between 18 and 34. “Seniors” refers to those 65 or older.

## 1.2 DEMOGRAPHIC CHARACTERISTICS

The following table presents a sample profile for the baseline survey. This includes demographic characteristics related to region of the city and type of community, as well as type of dwelling, along with individual demographic characteristics (sex, age, education, language spoken at home, and household income).

**Table 1: Demographic Table**

*Table 1a: Region (Unweighted)*

-	<b>Total</b>
<i>n</i> =	803
Kanata/Stittsville	11%
Nepean	16%
West end	10%
Central	14%
East end	12%
South end	14%
Orleans	11%

<sup>1</sup> Testing includes Chi2 and Student t tests to examine statistical significance of differences in sub-groups from the overall result.



-	<b>Total</b>
Rural	9%
Unknown	3%

*Table 1b: Type of neighbourhood*

-	<b>Total</b>
n=	803
Urban	44%
Sub-urban	44%
Rural	11%
Decline to answer	1%

*Table 1c: Type of dwelling*

-	<b>Total</b>
n=	803
Detached home	58%
Semi-detached home	7%
Townhome	11%
Duplex or Triplex	2%
Apartment or condominium building	19%
Decline to answer	3%

*Table 1d: Sex (Unweighted)*

-	<b>Total</b>
n=	803
Male	49%
Female	51%

*Table 1e: Age (Unweighted)*

-	<b>Total</b>
n=	803
18 to 34	20%
35 to 44	20%
45 to 54	20%
55 to 64	20%
65 or older	19%
Decline to answer	1%

*Table 1f: Education (unweighted)*

-	<b>Total</b>
<i>n</i> =	803
High school or less	15%
College, Registered Apprenticeship/trade certificate/diploma	26%
Undergraduate university certificate, diploma or degree	31%
Postgraduate degree above bachelor's level	27%
Decline to answer	2%

*Table 1g: Language*

-	<b>Total</b>
<i>n</i> =	803
English	84%
French	11%
Other	5%
Decline to answer	0%

*Table 1h: Total income of all persons in your household combined, before taxes*

-	<b>Total</b>
<i>n</i> =	803
Under \$40,000	12%
\$40,000 to just under \$80,000	19%
\$80,000 to just under \$100,000	11%
\$100,000 to just under \$150,000	16%
\$150,000 and above	17%
Decline to answer	25%

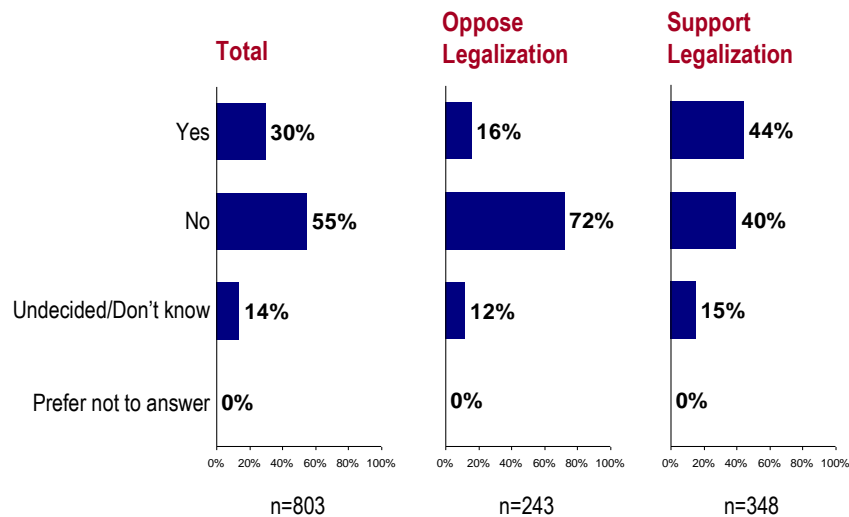
## 2. FINDINGS

### 2.1 ANTICIPATED CONSUMPTION WITHIN SOCIAL CIRCLE

Respondents were asked whether they knew of any friends or family members who were considering purchasing cannabis for recreational use in the next 12 months. Three in ten Ottawa residents (30 per cent) know someone who intends to acquire cannabis, while just over half (55 per cent) do not. One in seven (14 per cent) are uncertain.

**Chart 1: Anticipated Consumption within Social Circle**

**“As far as you know, are any of your friends or family considering purchasing cannabis for recreational use in the next 12 months?”**



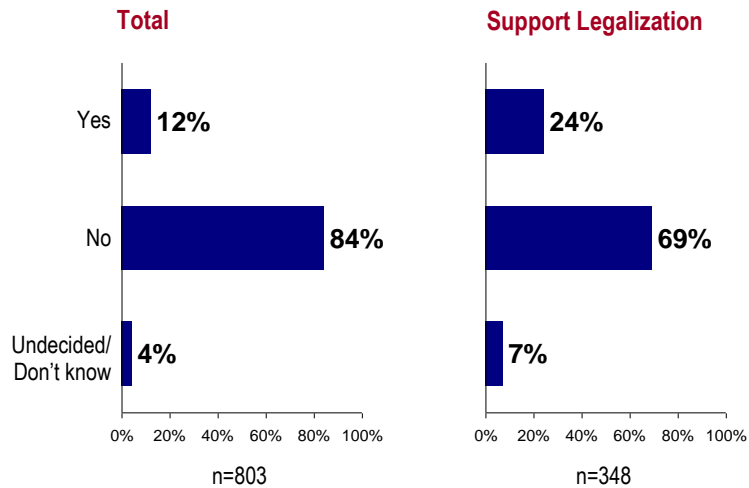
- Those aged 65 and over are comparatively less likely to know someone whom they expect to purchase cannabis for recreational use (17 per cent).

## 2.2 ANTICIPATED PERSONAL CONSUMPTION

Likewise, respondents were asked whether they expect to purchase recreational cannabis themselves in the next 12 months. Results reveal that one in eight Ottawa residents (12 per cent) plan to acquire cannabis, while just over eight in ten (84 per cent) do not.

### Chart 2: Anticipated Personal Consumption

“Do you expect to purchase cannabis for recreational use in the next 12 months?”



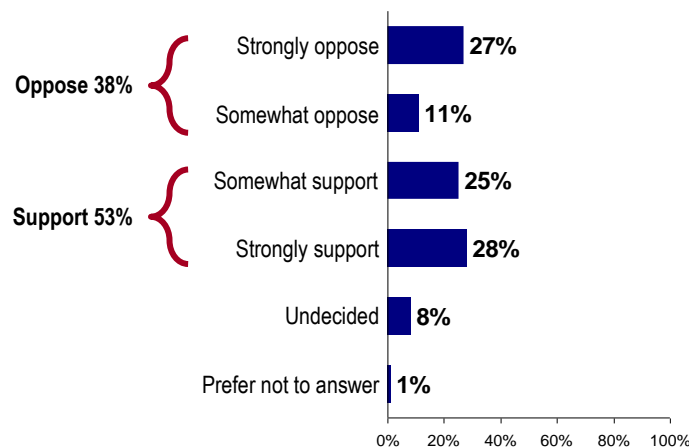
- Men are somewhat more likely to say they plan to purchase recreational cannabis themselves (15 per cent, compared to nine per cent of women).

## 2.3 SUPPORT FOR LEGALIZATION

Results indicate that Ottawa residents lean towards supporting the federal government's decision to legalize recreational cannabis use, although a significant portion of the population are opposed to it. About half of respondents (53 per cent) support this policy, while just under four in ten (38 per cent) disapprove.

### Chart 3: Support for Legalization

**“Do you support or oppose the federal government's decision to legalize recreational cannabis use? Would that be strongly or somewhat?”**



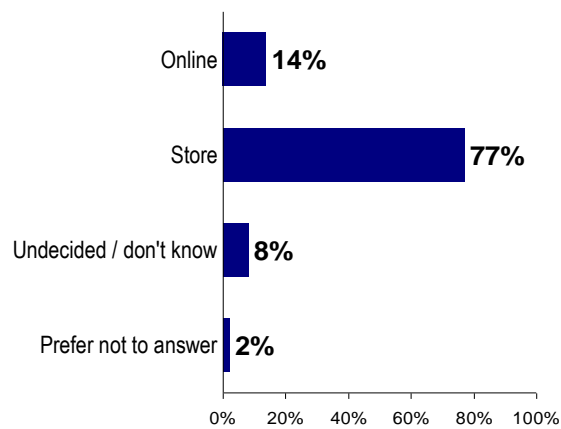
- Not surprisingly, support for legalization varies with anticipated exposure to cannabis. Fully 87 per cent of those who intend to purchase cannabis themselves, along with 63 per cent of those who expect friends and family to purchase it, support its legalization. This figure drops to 44 per cent among those who do not expect to see recreational cannabis within their social circle.
- Those aged 65 and over are somewhat more opposed to the legalization of cannabis (54 per cent, compared to 30 per cent of those under the age of 35).
- Those with a high school education are more apt to say they oppose legalization (49 per cent).

## 2.4 PREFERRED METHOD OF PURCHASE

Those who expect to purchase recreational cannabis were asked whether they would prefer to acquire it through a store or through an online medium. Results reveal a clear preference for the former, with three-quarters of these respondents (77 per cent) selecting a retail outlet as their preferred method. Just one in seven (14 per cent) would opt for the online option. Eight per cent are undecided. Two per cent are undecided.

### Chart 4: Preferred Method of Purchase

**“If you had to pick one method, do you think you would prefer to buy cannabis online or in a store?”**

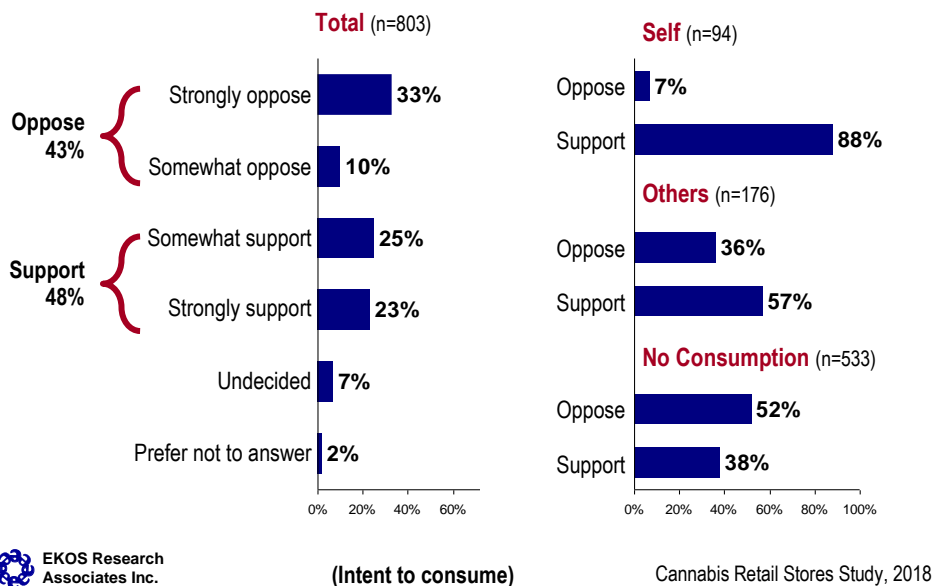


## 2.5 SUPPORT FOR RETAIL SALE OF CANNABIS

Results reveal the mix of attitudes that exist regarding whether or not recreational cannabis should be sold at a retail level in Ottawa. Half of Ottawa residents (48 per cent) would support allowing retail stores to sell cannabis, however, nearly as many (43 per cent) would oppose such an enterprise. Seven per cent are unsure. Among supporters of legalization 78 per cent support cannabis retail stores. Among those who oppose legalization only 10 per cent support retail stores and 83 are opposed to them.

### Chart 5: Support for Retail Sale of Cannabis

“To what extent do you support or oppose allowing retail stores for recreational cannabis in Ottawa?”



- Again, support varies between consumers and non-consumers of cannabis. Among those who expect to purchase cannabis or expect a friend or family member to do so, 88 per cent and 57 per cent, respectively, support allowing retail stores to carry it. This figure drops to 38 per cent among those do not anticipate purchasing it or know others who will.
- Correspondingly, opposition is somewhat greater among those aged 55 and over (50 to 54 per cent, compared to 32 per cent of youth), who are less likely to consume cannabis. Support is highest among those under 35 (54 per cent).

- Women are somewhat more likely to oppose the retail sale of cannabis than men (48 per cent versus 38 per cent).
- Regionally, opposition is greatest in the Kanata/Stittsville area (56 per cent) where the age profile is somewhat older, while it is lowest in Central Ottawa (33 per cent) where it is youngest.
- From a socioeconomic standpoint, support is highest among those with a undergraduate university degree and household income of \$100,000 or greater (57 and 55 per cent respectively), while the least educated and affluent, who are often older, are least supportive (41 to 42 per cent).

### a) Reasons for Supporting Retail Sale of Cannabis

Those who indicated that they support the sale of recreational cannabis in retail stores were asked to elaborate on the reasons for their opinion. Unprompted responses varied and did not centre on any one theme. One in five respondents believe that retail outlets will help eradicate the black market (19 per cent) or that cannabis, as a legal good, should be treated similar to alcohol and cigarettes (18 per cent). One in eight argue that retail availability would lead to an improved customer experience in terms of quality, price, and service (14 per cent), as well as more convenient access (12 per cent). Slightly fewer (10 per cent) say that retail stores will allow governments to exercise more control over recreational cannabis.

**Table 2: Reasons for Supporting Retail Sale of Cannabis**

*What is your main reason for supporting retail stores for recreational cannabis in Ottawa?*

	<b>Total</b>
-	
<i>n</i> =	397
Eradicate the black market, cut down on crime/public safety, lessen contraband	19%
It is legal, so should be available like other legal products (alcohol, cigarettes...)	18%
Service to customer improved (quality, price, serves those without credit card/uncomfortable with on line sales, able to see/ask questions about product, information, faster/better service, reliable knowledge of vendors)	14%
Ease of access, convenience	12%
Prefers government has some or more control/regulation, regulate sales, can keep track of	10%
Prefer free market to avoid government monopoly, prefer lack of government control	5%
Contributes to local economy, creates jobs	5%
Common sense, no problem with it, no reason not to	4%
For those with medicinal needs access, for health/mental health reasons, more available for those in need	3%
Everyone's right to choose, personal freedom of choice	2%
Generate tax revenue	2%



-	Total
Safe/safer (general mention)	2%
Other	1%
Prefer not to answer	2%

- Those who are 55 to 64 are most apt to support retail stores because if it is legal then access should be universal (31 per cent).
- This view is also most prevalent among residents of Nepean (29 per cent).

## b) Reasons for Opposing Retail Sale of Cannabis

Similarly, those respondents who indicated that they oppose the sale of recreational cannabis in retail stores were asked, unprompted, to explain their reasoning. Again, respondents provided a variety of explanations. One in five of these respondents (18 per cent) attribute their opposition to the need for stricter controls on the sale of cannabis. One in seven argued that retail availability will increase access among minors (15 per cent) or raised concerns over health and addiction (15 per cent). One in ten cited their opposition to legalized cannabis in general (10 per cent), while slightly fewer worry that its increased accessibility will lead to cannabis becoming more mainstream (seven per cent) or cited concerns over public safety (six per cent).

**Table 3: Reasons for Opposing Retail Sale of Cannabis**

*What is your main reason for opposing retail stores for recreational cannabis in Ottawa?*

-	Total
n=	341
Needs to be controlled (in LCBO, operate like alcohol sales, government needs to have better controls, could lead in loss of control in the market)	18%
Access to minors/young/teens (selling to, more visible/likely to use, more accessible)	15%
Health concerns (mental/physical), concern for long term use/effects, addiction issues, negative effects on the developing brain/18yrs-25yrs	15%
Opposition to legalized weed	10%
Increased availability/accessible, more exposure to it, becomes normalized/mainstream	7%
It is dangerous, concerns for public safety/safety, causes societal problems (general mention)	6%
Concern for youth/children, impact on children/young kids	4%
Concerns about recreational use (pro medicinal/against recreational use)	4%
Increases in driving impaired by cannabis	4%
Not necessary/appropriate (general mention)	4%
Do not use it/like it, dislike smell, personally do not want to see it	2%
Impacts on neighbourhoods/areas (personal plant growing, impacts on real estate values, type of people walking/hanging around, close to schools/churches/parks...)	2%

	<b>Total</b>
-	
Lack of research/precedent set, need for more information/research done	2%
Leads to harder drugs, it is a gateway drug	2%
Crime/violence increased, leads people to break the law	1%
Prefer not to answer	3%

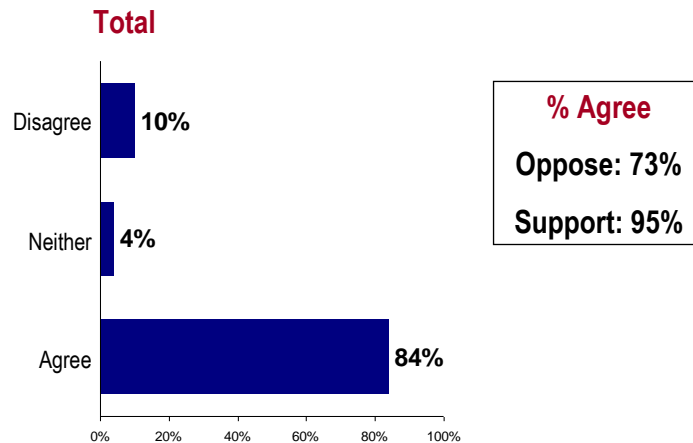
- That it needs to be controlled just like alcohol is a response most often elicited among the most educated (32 per cent among those with a university degree). This is also most prevalent among residents of the Central part of the city (34 per cent).
- Greater access to teens is a concern more often espoused among those 55-64 (24 per cent), and in particular, residents of the West End (33 per cent).

## 2.6 ANTICIPATED IMPACT ON ACCESSIBILITY

Irrespective of views about legalization and whether or not retail stores should be placed in Ottawa, the large majority of Ottawa residents agree that cannabis will become easier for of-age consumers to acquire under a retail model. Fully 84 per cent agree that having retail stores for recreational cannabis will make it easier for consumers to purchase the products they want, compared to just 10 per cent who disagree. Four per cent neither agree nor disagree.

### Chart 6: Anticipated Impact on Accessibility

“Having retail stores for recreational cannabis in Ottawa will make it easier for people to purchase the products they want”



- Agreement that retail availability will facilitate acquiring cannabis varies with both anticipated exposure to cannabis (from 80 per cent among those with no expected connection to cannabis to 97 per cent among those who intend to purchase it themselves) and support for the sale of recreational cannabis (from 73 per cent among those who oppose its sale to 95 per cent among those who support its sale).
- Agreement is higher among Anglophones (85 per cent, compared to 77 per cent of French speakers), while it is lowest among those in the lowest income cohort (80 per cent, compared to 88 to 90 per cent elsewhere).

## 2.7 CONCERNS ABOUT RETAIL

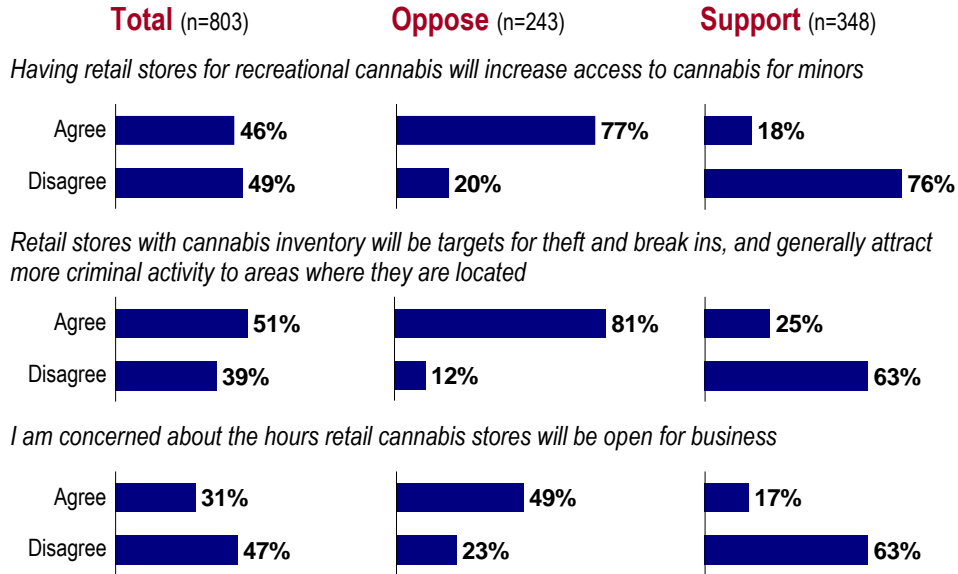
Respondents were presented with a list of common arguments against allowing the sale of cannabis at retail establishments and asked to rate the extent to which they agree or disagree with each one. Results highlight significant concerns about the perceived negative externalities produced by the retail cannabis market, while respondents are comparatively less concerned about the shopping experience itself.

Half of respondents agree that retail stores with cannabis inventory will become targets for break-ins (51 per cent, compared to 39 per cent who disagree). There are almost even splits in other areas, including more than four in ten who agree that retail availability will increase access to cannabis among minors (46 per cent, and 49 per cent who disagree), are concerned about the smell from retail stores (44 per cent, and 45 per cent who disagree), or agree that we should not be increasing access to cannabis given the associated health concerns (44 per cent, and 47 per cent).

Fewer respondents (31 per cent) expressed concerns about the hours retail stores will be open (although 47 per cent disagree). A similar proportion (28 per cent) say they would be concerned about their personal safety while shopping at a retail store that sells cannabis (although in this case 61 per cent disagree).

## Chart 7a: Concerns about Retail

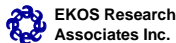
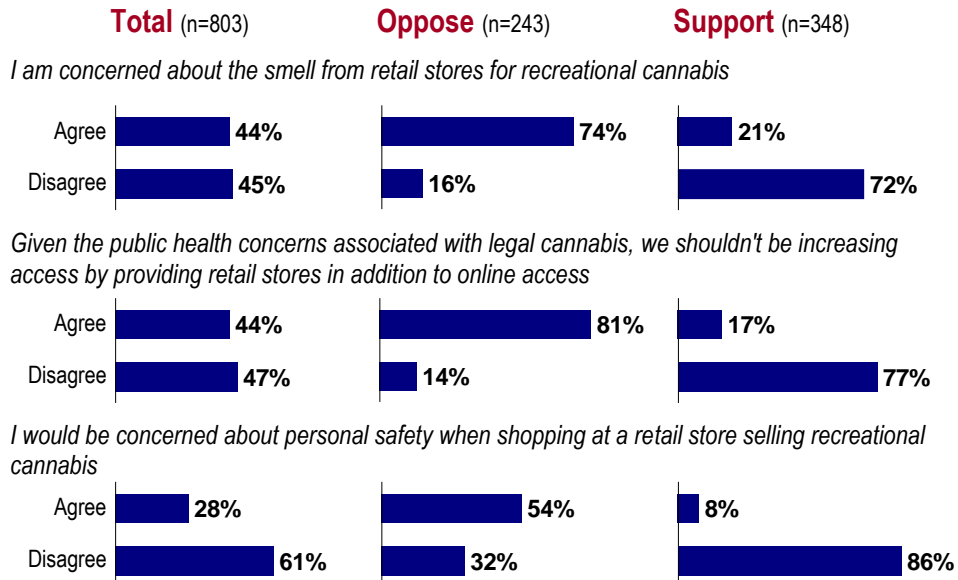
“To what extent do you agree or disagree with the following statements?”



Cannabis Retail Stores Study, 2018

## Chart 7b: Concerns about Retail

“To what extent do you agree or disagree with the following statements?”



Cannabis Retail Stores Study, 2018

- Those who oppose the sale of recreational cannabis, as well as those who do not expect that anyone in their immediate social circle will purchase cannabis, are consistently more likely to agree with each of these arguments. For instance, 77 per cent of those who oppose its sale believe a retail model will increase access among minors, compared to just 18 per cent of those who support its sale. Similarly, 53 per cent of those who do not anticipate any connection to cannabis agree that access among minors is a serious concern, compared to 39 per cent among those who expect friends and family will purchase cannabis and 16 per cent among those who plan to purchase cannabis themselves.
- Those aged 65 and over are more likely to express concerns over the negative externalities of retail sales. For instance, 60 per cent of these respondents believe that retail stores will attract crime.
- Women are somewhat more likely to raise concerns over the smell from retail stores (50 per cent, compared to 38 per cent of men).
- Low-income respondents are comparatively more concerned about the smell from retail stores (52 per cent), as well as their personal safety when shopping (39 per cent).
- Concerns over crime and safety appear to be inversely correlated with level of education. Among the high school educated, 65 per cent are worried that retail stores will attract crime (compared to 38 per cent of those with a graduate degree) and 41 per cent would be concerned about their personal safety when shopping at a retail establishment (versus 18 per cent).
- Regionally, those who reside in the Kanata/Stittsville area are consistently more likely to raise concerns over negative externalities, while those who live in Central Ottawa are the least likely to do so. For instance, 61 per cent of Kanata/Stittsville residents are concerned about the smell from retail stores, compared to 31 per cent of those who reside in Central Ottawa.

## 2.8 ARGUMENTS FOR RETAIL

Respondents were also presented with a list of common arguments in favour of allowing the sale of cannabis at the retail level and asked to rate the extent to which they agree or disagree with each one. Eight in ten respondents (80 per cent) believe that if retail cannabis outlets are not permitted in Ottawa, consumers will continue to use illegal dispensaries. Three-quarters (74 per cent) agree retail stores will provide consumers with a wider array of choices and improve accessibility. Two-thirds (67 per cent) say that a local retail market for recreational cannabis will create jobs and benefit Ottawa's economy. Results reveal comparatively more scepticism regarding the privacy benefits of retail stores, with half of respondents (50 per cent) agreeing that retail stores offer more privacy than online government sales, compared to 29 per cent who disagree.

## Chart 8a: Arguments for Retail

“To what extent do you agree or disagree with the following statements?”

**Total** (n=803)

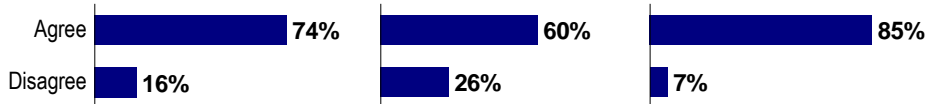
**Oppose** (n=243)

**Support** (n=348)

*Retail stores for recreational cannabis provide more privacy than online government sales, where personal and credit card information are needed*



*Retail stores for recreational cannabis would provide more options, which would increase ease of access to cannabis products*



Cannabis Retail Stores Study, 2018

## Chart 8b: Arguments for Retail

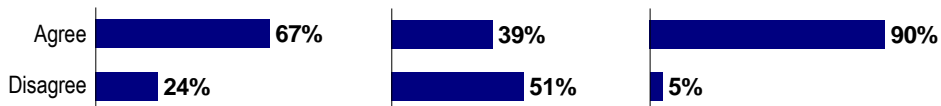
“To what extent do you agree or disagree with the following statements?”

**Total** (n=803)

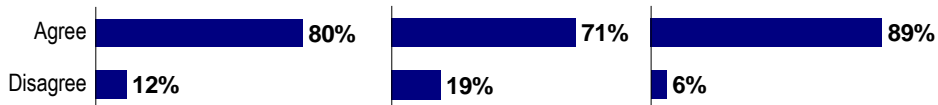
**Oppose** (n=243)

**Support** (n=348)

*Retail stores for recreational cannabis will create jobs and benefit Ottawa's economy*



*If retail stores for recreational cannabis are not permitted in Ottawa people will continue to use illegal dispensaries*



Cannabis Retail Stores Study, 2018



- Those who support the sale of recreational cannabis are consistently much more likely to agree with each of these statements. For example, 90 per cent endorse the position that retail stores will benefit Ottawa's economy, a figure that drops to 39 per cent among those who are opposed to the sale of recreational cannabis.
- Women are relatively more likely to agree that if retail stores are not permitted, consumers will continue to turn to the black market (84 per cent, compared to 76 per cent of men).
- Anglophones are more apt to agree that consumers will continue to use the black market in the absence of a retail option (82 per cent, compared to 73 per cent of Francophones) and that retail availability will improve selection (75 per cent versus 64 per cent).



APPENDIX A  
SURVEY QUESTIONNAIRE



**PINTRO**

Hello, my name is... and I work for EKOS Research Associates. We are conducting a survey for the City of Ottawa to obtain the views of Ottawa residents on important issues.

The survey is voluntary and completely confidential. Can I ask if you are at least 18 years old and a permanent resident of Canada?

(If No) Is there someone at home now that I could speak to who is 18 years of age or older?

(If Yes) The questionnaire takes about 10 minutes to complete, but it provides you with a unique opportunity to let the municipal government know how you feel about things that affect us all. May I begin? All of your responses to the survey are completely confidential.

(If refused) **Thank and terminate.**

**PRIV**

This call may be recorded for quality control or training purposes.

**QSEX**

Do you identify as:

Male.....	1
Female .....	2
Another gender identity (Please Specify) : .....	77
Decline to answer .....	99

**QAGEY**

In which of the following age categories do you belong?

18 to 34.....	1
35 to 44.....	2
45 to 54.....	3
55 to 64.....	4
OR 65 or older? .....	5
Decline to answer .....	9

**PQ1**

As of October 17, Ontarians 19 years of age or older may buy, grow and consume cannabis for recreational use, subject to specific rules on quantity.

**Q1**

Do you support or oppose the federal government's decision to legalize recreational cannabis use? Would that be strongly or somewhat?

Strongly oppose.....	1
Somewhat oppose.....	2
Somewhat support.....	3
Strongly support .....	4
Undecided.....	8
Prefer not to answer.....	9

**Q2**

As far as you know, are any of your friends or family considering purchasing cannabis for recreational use in the next 12 months?

- Yes..... 1
- No..... 2
- Undecided / don't know ..... 8
- Prefer not to answer..... 9

**Q2A**

Do you expect to purchase cannabis for recreational use in the next 12 months?

- Yes..... 1
- No..... 2
- Undecided / don't know ..... 8
- Prefer not to answer..... 9

**Q2B**

*Yes, Undecided, Q2A*

If... Q2A = 1,8

If you had to pick one method, do you think you would prefer to buy cannabis online or in a store?

- Online ..... 1
- Store ..... 2
- Undecided / don't know ..... 8
- Prefer not to answer..... 9

**Q3**

To what extent do you support or oppose allowing retail stores for recreational cannabis in Ottawa?

- Strongly oppose..... 1
- Somewhat oppose..... 2
- Somewhat support..... 3
- Strongly support..... 4
- Undecided..... 8
- Prefer not to answer..... 9

**Q3B**

*Support or Oppose, Q3*

If... Q3 = 1,2,3,4

What is your main reason for <supporting/opposing> retail stores for recreational cannabis in Ottawa?

- Please specify : ..... 77
- Prefer not to answer..... 99 X

**PQ4**

The Province of Ontario sells recreational cannabis online through the Ontario Cannabis Store. The Province is also letting municipalities decide if they will permit sale of recreational cannabis at retail locations within their municipality

To what extent do you agree or disagree with the following statements:

**Q4**

Having retail stores for recreational cannabis in Ottawa will make it easier for people to purchase the products they want.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q5**

Having retail stores for recreational cannabis will increase access to cannabis for minors.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q6**

Retail stores with cannabis inventory will be targets for theft and break ins, and generally attract more criminal activity to areas where they are located.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q8**

Retail stores for recreational cannabis provide more privacy than online government sales, where personal and credit card information are needed.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q9**

I am concerned about the hours retail cannabis stores will be open for business.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q10**

Retail stores for recreational cannabis would provide more options, which would increase ease of access to cannabis products.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q11**

I am concerned about the smell from retail stores for recreational cannabis.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q12**

Retail stores for recreational cannabis will create jobs and benefit Ottawa's economy.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

**Q13**

If retail stores for recreational cannabis are not permitted in Ottawa people will continue to use illegal dispensaries.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S



### Q14

Given the public health concerns associated with legal cannabis, we shouldn't be increasing access by providing retail stores in addition to online access.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

### Q15

I would be concerned about personal safety when shopping at a retail store selling recreational cannabis.

Strongly disagree .....	1	
Somewhat disagree .....	2	
Neither agree nor disagree .....	3	
Somewhat agree .....	4	
Strongly agree.....	5	
Don't Know/ No Opinion.....	9	S

### Q16

Do you have any other comments you would like to share regarding retail stores for recreational cannabis in Ottawa?

Yes (please specify) : .....	77	
No .....	98	X
Don't know / No response.....	99	X

### DEMIN

Thank you for answering our questions about retail stores for recreational cannabis. We have just a few more questions (nine in total) to help us analyze the survey results.

### QHOUSE

What type of home do you live in?

Detached home .....	1	
Semi-detached home .....	2	
Townhome.....	3	
Duplex or Triplex .....	4	
Apartment or condominium building .....	5	
Decline to answer .....	9	

### QURBRUR

How would you describe your neighbourhood: Urban, sub-urban or rural?

Urban .....	1	
Sub-urban .....	2	
Rural .....	3	
Decline to answer .....	9	

**QFSA**

What are the first three digits of your postal code:

INTERVIEWER NOTE: Format A1A

Please specify : .....	77
Decline to answer .....	99

**QEDUC**

What is the highest level of formal education that you have completed?

Grade 8 or less .....	1
Some high school .....	2
High school diploma or equivalent .....	3
Registered Apprenticeship or other trade certificate or diploma .....	4
College, CEGEP, or other non-university certificate or diploma .....	5
University certificate or diploma below bachelor's level.....	6
Bachelor's degree.....	7
Postgraduate degree above bachelor's level.....	8
Decline to answer .....	99

**QLANG**

What language do you speak most often at home?

English.....	1
French.....	2
Other, please specify: .....	77
Decline to answer .....	99

X

**QINC**

Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes?

Under \$20,000.....	1
\$20,000 to just under \$40,000 .....	2
\$40,000 to just under \$60,000 .....	3
\$60,000 to just under \$80,000 .....	4
\$80,000 to just under \$100,000 .....	5
\$100,000 to just under \$150,000 .....	6
\$150,000 and above.....	7
Decline to answer .....	9

**THNK**

Those are all the questions we had for you - thank you very much for taking the time to share your opinion.

## **PINTRO**

Bonjour, je m'appelle... et je travaille pour EKOS Research Associates. Nous menons un sondage pour le compte de la Ville d'Ottawa en vue d'obtenir les opinions des résidents d'Ottawa sur des questions importantes.

La participation au sondage est volontaire et confidentielle. Puis-je vous demander si vous avez au moins 18 ans et si vous êtes résident permanent au Canada?

(SI LA RÉPONSE EST NÉGATIVE) Y a-t-il quelqu'un à la maison à qui je pourrais parler et qui a au moins 18 ans?

(SI OUI) Il faut environ 10 minutes pour répondre au sondage; celui-ci vous offre l'occasion unique de communiquer au gouvernement municipal votre opinion sur des questions qui nous concernent tous. Puis-je commencer? Toutes vos réponses au sondage sont entièrement confidentielles.

(En cas de refus) **Remercier et terminer.**

## **PRIV**

Cet appel peut être enregistré pour contrôle de la qualité ou formation.

## **QSEX**

Est-ce que vous vous considérez comme :

Un homme .....	1
Une femme .....	2
Une autre identité de genre (veuillez préciser) : .....	77
Je refuse de répondre .....	99

## **QAGEY**

À quel groupe d'âge parmi les suivants appartenez-vous?

De 18 à 34 ans .....	1
De 35 à 44 ans .....	2
De 45 à 54 ans .....	3
De 55 à 64 ans .....	4
OU 65 ans ou plus .....	5
Je refuse de répondre .....	9

## **PQ1**

Depuis le 17 octobre, les Ontariens âgés de 19 ans ou plus peuvent acheter, faire pousser et consommer du cannabis à usage récréatif pourvu qu'ils respectent certaines règles en ce qui concerne la quantité.

## **Q1**

Est-ce que vous appuyez la décision du gouvernement fédéral de légaliser la consommation de cannabis à usage récréatif ou vous vous y opposez? Est-ce vous l'appuyez fortement ou dans une certaine mesure ou vous vous y opposez fortement ou dans une certaine mesure?

Je m'y oppose fortement .....	1
Je m'y oppose quelque peu .....	2

Je l'appuie dans une certaine mesure .....	3
Je l'appuie fortement.....	4
Je suis indécis(e).....	8
Je préfère ne pas répondre .....	9

**Q2**

À ce que vous sachiez, est-ce l'un ou l'autre de vos amis ou des membres de votre famille envisage de se procurer du cannabis à usage récréatif au cours des douze prochains mois?

Oui.....	1
Non.....	2
Je suis indécis(e)s/Je ne sais pas.....	8
Je préfère ne pas répondre .....	9

**Q2A**

Vous attendez-vous à vous procurer du cannabis à usage récréatif au cours des douze prochains mois?

Oui.....	1
Non.....	2
Je suis indécis(e)s/Je ne sais pas.....	8
Je préfère ne pas répondre .....	9

**Q2B**

*Oui, Indécis(e), Q2A*

If... Q2A = 1,8
-----------------

Si vous aviez à choisir une méthode, est-ce que vous préféreriez vous procurer du cannabis en ligne ou dans une boutique?

En ligne .....	1
Dans une boutique .....	2
Je suis indécis(e)s/Je ne sais pas.....	8
Je préfère ne pas répondre .....	9

**Q3**

À quel point appuyez-vous la vente de cannabis à usage récréatif dans des magasins de détail à Ottawa ou vous y opposez-vous?

Je m'y oppose fortement .....	1
Je m'y oppose quelque peu .....	2
Je l'appuie dans une certaine mesure .....	3
Je l'appuie fortement.....	4
Je suis indécis(e).....	8
Je préfère ne pas répondre .....	9

### Q3BA

#### *Oppose ou appuie, Q3*

If... Q3 = 1,2,3,4

Quelle est la principale raison pour laquelle < vous êtes d'accord pour /vous vous opposez à ce> que des magasins de détail vendent du cannabis à usage récréatif à Ottawa?

Veillez préciser :..... 77

Je préfère ne pas répondre ..... 99 X

### PQ4

La province d'Ontario vend du cannabis à usage récréatif en ligne par le biais de la Société ontarienne du cannabis. La province laisse également aux municipalités le soin de décider si elles permettent la vente de cannabis à usage récréatif dans des magasins de détail dans les limites de leur territoire.

À quel point êtes-vous d'accord ou en désaccord avec les énoncés suivants :

### Q4

S'il y a des magasins de détail de cannabis récréatif à Ottawa, il sera plus facile pour les gens de se procurer les produits qu'ils veulent.

Fortement en désaccord..... 1

Plutôt en désaccord..... 2

Ni d'accord ni en désaccord..... 3

Plutôt d'accord..... 4

Tout à fait d'accord..... 5

Je ne sais pas/ Pas d'opinion ..... 9 S

### Q5

S'il y a des magasins de détail de cannabis récréatif, les mineurs auront davantage accès au cannabis.

Fortement en désaccord..... 1

Plutôt en désaccord..... 2

Ni d'accord ni en désaccord..... 3

Plutôt d'accord..... 4

Tout à fait d'accord..... 5

Je ne sais pas/ Pas d'opinion ..... 9 S

### Q6

Les magasins de détail qui vendent des produits du cannabis seront ciblés pour les vols et les cambriolages, et en règle générale feront augmenter les activités criminelles dans les zones où ils se trouvent.

Fortement en désaccord..... 1

Plutôt en désaccord..... 2

Ni d'accord ni en désaccord..... 3

Plutôt d'accord..... 4

Tout à fait d'accord..... 5

Je ne sais pas/ Pas d'opinion ..... 9 S

### Q8

Les magasins de détail de cannabis récréatif protègent mieux la vie privée que les ventes en ligne du gouvernement, où il faut laisser des renseignements personnels et des numéros de carte de crédit.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q9

Les heures d'ouverture des magasins de détail de cannabis récréatif sont une source de préoccupation pour moi.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q10

Les magasins de détail de cannabis récréatif fourniront plus d'options, ce qui augmentera la facilité d'accès aux produits du cannabis.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q11

L'odeur qui se dégagera des magasins de détail de cannabis récréatif est une source de préoccupation pour moi.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q12

Les magasins de détail de cannabis récréatif créeront des emplois et profiteront à l'économie d'Ottawa.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q13

Si les magasins de détail de cannabis récréatif ne sont pas permis à Ottawa, les gens continueront d'avoir recours à des fournisseurs illégaux.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q14

Compte tenu des préoccupations de santé publique associées au cannabis légal, nous ne devrions pas en augmenter l'accès en mettant sur pied des magasins de détail en plus de l'accès en ligne.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q15

Je me préoccuperais de ma sécurité personnelle serait si j'allais à un magasin de détail de cannabis récréatif.

Fortement en désaccord.....	1	
Plutôt en désaccord.....	2	
Ni d'accord ni en désaccord.....	3	
Plutôt d'accord.....	4	
Tout à fait d'accord.....	5	
Je ne sais pas/ Pas d'opinion.....	9	S

### Q16

Est-ce que vous aimeriez formuler d'autres commentaires concernant les magasins de détail de cannabis récréatif à Ottawa?

Oui (veuillez préciser) :.....	77	
Non.....	98	X
Je ne sais pas / Pas de réponse.....	99	X

### DEMIN

Merci d'avoir répondu à nos questions sur les magasins de détail de cannabis récréatif. Nous avons quelques autres questions à vous poser (neuf en tout) qui nous permettront de mieux analyser les résultats du sondage.

### QHOUSE

Dans quel type de résidence habitez-vous?

Maison unifamiliale.....	1	
Maison jumelée.....	2	
Maison en rangée.....	3	
Duplex ou triplex.....	4	

Immeuble d'appartements ou de condos .....	5
Je refuse de répondre .....	9

## **QURBRUR**

Comment décririez-vous votre quartier? Urbain, banlieusard ou rural?

Urbain.....	1
Banlieusard.....	2
Rural .....	3
Je refuse de répondre .....	9

## **QFSA**

Quels sont les trois premiers caractères de votre code postal?

NOTE À L'ENQUÊTEUR : Format A1A

Veuillez préciser : .....	77
Je refuse de répondre .....	99

## **QEDUC**

Quel est le plus haut niveau de scolarité que vous ayez atteint?

8e année ou moins .....	1
Un peu d'école secondaire .....	2
Diplôme d'études secondaires ou l'équivalent .....	3
Apprentissage enregistré ou tout autre certificat ou diplôme d'une école de métiers .....	4
Certificat ou diplôme d'un collège, du CÉGEP ou de tout autre établissement non universitaire .....	5
Certificat ou diplôme universitaire inférieur au baccalauréat.....	6
Baccalauréat .....	7
Études supérieures .....	8
Je refuse de répondre .....	99

## **QLANG**

Quelle langue parlez-vous le plus souvent à la maison?

Anglais .....	1
Français .....	2
Autre, veuillez préciser : .....	77
Je refuse de répondre .....	99

X

## **QINC**

Laquelle des catégories suivantes décrit le mieux le revenu total de votre ménage? C'est-à-dire, le revenu total de toutes les personnes de votre ménage avant impôts?

Moins de 20 000 \$ .....	1
De 20 000 \$ à moins de 40 000 \$ .....	2
De 40 000 \$ à moins de 60 000 \$ .....	3
De 60 000 \$ à moins de 80 000 \$ .....	4
De 80 000 \$ à moins de 100 000 \$ .....	5
De 100 000 \$ à moins de 150 000 \$ .....	6
150 000 \$ ou plus .....	7



Je refuse de répondre ..... 9

**THNK**

Ce sont toutes les questions que j'avais à vous poser. Merci beaucoup d'avoir pris le temps de partager votre opinion avec nous.



# APPENDIX B

## RESPONSE RATE



## APPENDIX B: Response Rate

<b>Total Sample</b>	<b>Number of People</b>
Valid and invalid sample attempted	15,172

<b>Out of Scope</b>	<b>Number of People</b>
Invalid number, blocked by Bell, fax/modem, duplicate	3,404

<b>Unresolved (U)</b>	<b>Number of People</b>
Busy, no answer answering machine	8,781

<b>In-Scope- non responding (IS)</b>	<b>Number of People</b>
Language Problem	146
Refusal	1,927
Qualified respondent break-off	0
<b>Total</b>	<b>2,073</b>

<b>In-scope – Responding Units (R)</b>	<b>Number of People</b>
Completed interviews	803
Ineligible, quota filled	111
<b>Total</b>	<b>914</b>

Response Rate = $R/(U+IS+R)$	<b>7.8%</b>
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The response rate described in the report for the RDD telephone sample which uses the total numbers called (15,172) minus those found invalid (3,404) as the base (11,768), and the total number completed (803) plus those ineligible to complete the study (111) as the numerator (i.e., 914 divided by 12,768 or 7.8%), based on an industry standard formula.