

Public Input on Retail Cannabis in Ottawa

Introduction

On August 29, 2018, City Council directed staff to explore options to collect public input to inform Council's decision of whether or not to permit private cannabis retail stores within the City. There was a compressed time frame in which to undertake public input activities since the Cannabis License Act, 2018 was passed on October 17th.

Anticipating that a report to Council would be required in December, this left a very narrow window to collect and interpret resident input prior to developing a report and providing recommendations to Council.

In order to achieve this, staff employed two common public engagement methods, public opinion research through Ekos Research Associates and an online consultation. Staff did not organize public meetings, as they require three weeks of public notice prior to the meeting. However, paper copies of the survey were made available to residents at Client Service Centres across the city.

The results of the public opinion research are reported separately from this document, which is focused solely on the public input collected by the City directly.

As described below, on the balance of information available at the time of consultation, public input suggests that the City of Ottawa should allow the presence of private cannabis retail stores in Ottawa.

Methodology

Public input was collected through a survey, available online on ottawa.ca and in print at the City's Client Service Centres. The survey was available from October 24 to November 7, 2018. Staff developed public awareness of the survey through a public service announcement, social media promotion and broad earned media coverage.

The central issue for public input is "To what extent do residents support or oppose allowing retail stores for recreational cannabis in Ottawa?". However, it is also important to understand why residents support or oppose this issue as well as the unique views of cannabis consumers, as meeting the needs of the market is an essential element of minimizing or eliminating the illegal market as advised by the Ottawa Police Service.

To achieve these goals, staff formulated a set of twenty (20) questions based on correspondence with residents, examples of surveys from other jurisdictions, and experiences shared from jurisdictions that have already legalized cannabis. The questions asked on ottawa.ca mirrored the questions used for the public opinion research, including an additional nine (9) demographic questions.

In keeping with public opinion research industry standards, demographic information such as age, gender and household income are asked of participants to help City staff understand who is responding to the survey, relative to Ottawa's population, and what groups might be underrepresented. Including these questions in the online survey enables the identification and interpretation of variations in patterns of responses between the survey and the public opinion research. It further enables inclusive policy development through detailed analysis of particular cohorts.

It is important to note that results from the online survey cannot be interpreted as a representative sample of the general population.

Privacy Considerations

The City of Ottawa conducted this public input process in accordance with the *Municipal Freedom of Information and Protection of Privacy Act*. While the survey did include demographic questions which may be sensitive for some residents, responses cannot be linked to particular individuals. Additionally, all demographic questions were optional for respondents to answer or not.

In addition to responses, the survey tool utilized by the City collects metadata for the purposes of analysing distribution. This data helps determine where and when responses were provided, how the individual was referred to the survey (from which website or social media platform) and the technology used. Internet Protocol (IP) addresses are utilized for this purpose, but are not retained by the City. Survey metadata cannot be used to link survey responses to a particular individual.

Results

The survey achieved more than 23,000 responses, including 12,000 on the first day alone. As a measure of comparison, the consultation for the Vehicle-for-Hire By-law collected approximately 7,000 responses in a 30-day period.

Analysis of survey metadata indicated that 15,888 responses were made from within the City of Ottawa. An additional 6,334 responses came from other Canadian communities, with the remaining responses outside of Canada. While recognizing that some national and international responses may be residents that are travelling, only Ottawa-based responses are included for detailed analysis for the purposes of this report.

Public Input from the City of Ottawa

Question 1 Do you support or oppose the federal government's decision to legalize recreational cannabis use? Would that be strongly or somewhat?

Strongly support	10,574
Somewhat support	2,052
Undecided	235
Somewhat oppose	642
Strongly oppose	2,282
Prefer not to answer	103
Grand Total	15,888

Question 2 As far as you know, are any of your friends or family considering purchasing cannabis for recreational use in the next 12 months?

Yes	11,089
No	2,919
Undecided / Don't know	1,553
Prefer not to answer	159
Grand Total	15,720

Question 3 Do you expect to purchase cannabis for recreational use in the next 12 months?

Yes	7,915
No	5,649
Undecided / Don't know	1,926
Prefer not to answer	230
Grand Total	15,720

Question 4 **If you had to pick one method, do you think you would prefer to buy cannabis online or in a store?**

Online	764
Store	8,504
Undecided / Don't know	538
Prefer not to Answer	21
Grand Total	9,827

Question 5 **To what extent do you support or oppose allowing retail stores for recreational cannabis in Ottawa?**

Strongly support	10,610
Somewhat support	1,526
Somewhat oppose	596
Strongly oppose	2,665
Prefer not to answer	32
Undecided	197
Grand Total	15,626

Question 5a. **What is your main reason for supporting retail stores for recreational cannabis in Ottawa?**

Only individuals that indicated they support retail cannabis were asked this question. The 10,748 write-in responses were analysed and catalogued by City staff. The dominant themes included:

A better customer experience – Approximately one-half of all proponents indicated the expectation that retail stores will offer better service, variety and convenience, including the ability to purchase products without excessive delay. (n= 5,237)

Crime Prevention - Approximately one in four proponents indicated that retail cannabis sales would reduce illegal purchasing, diverting funding from organized crime and improving safety for consumers and communities. (n = 2,739)

Improved Accessibility – Approximately one-quarter of all proponents indicated the expectation that a private retail market will provide enhanced accessibility over an online only model, providing more options for persons living with disability and the only

legal purchasing option for persons who do not have a credit card or permanent address. (n = 2,433)

Growing the local economy – Approximately one -quarter of all proponents viewed retail cannabis stores as an economic driver for the local economy, particularly for entrepreneurs/small business. Private sector competition was also cited as a benefit for controlling costs and improving consumer experience. (n=2,402)

It's Legal – Approximately one in four proponents indicated that cannabis has been legalized federally and should not be obstructed at the municipal level. Many of these liken cannabis products to alcohol and tobacco. (n=2,189)

Additional comments indicated:

- Issues with online orders (n = 646)
- Privacy concerns (n=314)
- Retail will help limit youth access (n= 245)
- Presence in the community will help remove stigma/stereotypes regarding cannabis consumers. (n = 229)
- Particular benefits for medical users (n=176)
- Environmental benefits (n = 65)
- Influence on tourism (n=47)
- Miscellaneous comments (n = 325)

Question 5b **What is your main reason for opposing retail stores for recreational cannabis in Ottawa?**

Only individuals that indicated that they oppose retail cannabis were asked this question. The 2,728 write-in responses were analysed and catalogued by City staff. The dominant themes included:

Youth Access – Approximately four in ten opponents indicated belief that private retail cannabis stores will increase access to minors and/or influence more youth to use cannabis as a result of normalizing use among adults. (n = 1018)

Neighbourhood Impacts – Approximately one in five opponents expressed concern about possible community impacts, with particular concern about the City's lack of ability to determine locations and concentrations of stores. (n=507)

Prohibition – Approximately one in five opponents expressed support for a total prohibition on cannabis sales.(n=499)

Regulation - Approximately one in five opponents expressed preference for a more regulated sales environment, such as sales through LCBO stores or pharmacies.
(n = 421)

Public Health – Approximately three in twenty opponents expressed concern about negative health consequences, particularly for youth and persons with addiction issues.
(n=376)

Additional comments indicated:

- Concern that retail sales will normalize/encourage cannabis use (n = 339)
- Concern about public safety (n = 228)
- Concern that retail sales may lead to increased crime (n = 139)
- Concern that retail sales may lead to increased impaired driving (n = 127)
- Want online sales only (n = 108)
- Believe the City should wait and see what happens elsewhere (n = 20)
- Concern about negative economic impacts (n = 19)
- Religious Objections (n = 10)
- Miscellaneous comments (n = 36)

**Question 6 How strongly do you agree or disagree with the statement
“Having retail stores for recreational cannabis in Ottawa will
make it easier for people to purchase the products they want.”**

Strongly agree	10,480
Somewhat agree	2,742
Neither agree nor disagree	743
Somewhat disagree	266
Strongly disagree	695
Don't know / No opinion	319
Grand Total	15,245

Question 7 **How strongly do you agree or disagree with the statement “Having retail stores for recreational cannabis will increase access to cannabis for minors.”**

Strongly agree	2,389
Somewhat agree	1,042
Neither agree nor disagree	930
Somewhat disagree	2,784
Strongly disagree	7,878
Don't Know/No Opinion	222
Grand Total	15,245

Question 8 **How strongly do you agree or disagree with the statement “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 agree	2,175
Somewhat agree	1,551
Neither agree nor disagree	2,143
Somewhat disagree	3,547
Strongly disagree	5,210
Don't Know/No Opinion	619
Grand Total	15,245

Question 9 **How strongly do you agree or disagree with the statement “Retail stores for recreational cannabis provide more privacy than online government sales, where personal and credit card information are needed.”**

Strongly agree	5,524
Somewhat agree	3,778
Neither agree nor disagree	2,590
Somewhat disagree	994
Strongly disagree	1,130

Don't Know/No Opinion	1,055
Grand Total	15,071

Question 10 **How strongly do you agree or disagree with the statement “Retail stores for recreational cannabis would provide more options, which would increase ease of access to cannabis products.”**

Strongly agree	7,538
Somewhat agree	4,235
Neither agree nor disagree	1,577
Somewhat disagree	523
Strongly disagree	563
Don't Know/No Opinion	635
Grand Total	15,071

Question 11 **How strongly do you agree or disagree with the statement “I am concerned about the hours retail cannabis stores will be open for business.”**

Strongly agree	1,717
Somewhat agree	1,463
Neither agree nor disagree	3,610
Somewhat disagree	2,018
Strongly disagree	4,552
Don't Know/No Opinion	1,741
Grand Total	15,071

Question 11a What hours do you think are appropriate for cannabis sales in stores?

Only individuals that “Strongly Agree” or “Somewhat Agree” that they are concerned about retail hours were invited to answer this question. In total, 2,846 were summarized as follows:

- **Same as Alcohol** – Approximately one-half of respondents indicated that retail hours should be the same for cannabis as for alcohol. (n=1,254)
- **Zero Hours** –Approximately one in four respondents reiterated opposition to cannabis retail by indicating that no hours were appropriate for the retail sale of cannabis. (n=659)
- **Regular Retail Hours** - Approximately one in four respondents indicated that retail hours for cannabis should be during the day/early-evening when other retail stores in the community are open. (n = 631)
- **Same as Tobacco** – A small minority of respondents indicated that retail hours for cannabis should not be restricted, similar to the sale of tobacco products. (n = 110)

Question 12 How strongly do you agree or disagree with the statement “I am concerned about the smell from retail stores for recreational cannabis.”

Strongly agree	2,339
Somewhat agree	1,115
Neither agree nor disagree	1,202
Somewhat disagree	1,813
Strongly disagree	8,133
Don't Know/No Opinion	401
Grand Total	15,003

Question 13 **How strongly do you agree or disagree with the statement “Retail stores for recreational cannabis will create jobs and benefit Ottawa’s economy.”**

Strongly agree	8,149
Somewhat agree	3,616
Neither agree nor disagree	1,115
Somewhat disagree	543
Strongly disagree	1,204
Don’t Know/No Opinion	376
Grand Total	15,003

Question 14 **How strongly do you agree or disagree with the statement “If retail stores for recreational cannabis are not permitted in Ottawa people will continue to use illegal dispensaries.”**

Strongly agree	9,113
Somewhat agree	3,159
Neither agree nor disagree	884
Somewhat disagree	565
Strongly disagree	703
“Don’t Know/No Opinion	579
Grand Total	15,003

Question 15 **How strongly do you agree or disagree with the statement “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 agree	2,416
Somewhat agree	622
Neither agree nor disagree	515
Somewhat disagree	1,717
Strongly disagree	9,417

Don't Know/No Opinion	180
Grand Total	14,901

Question 16 **How strongly do you agree or disagree with the statement “I would be concerned about personal safety when shopping at a retail store selling recreational cannabis.”**

Strongly agree	1,381
Somewhat agree	825
Neither agree nor disagree	951
Somewhat disagree	1,600
Strongly disagree	9,661
Don't Know/No Opinion	453
Grand Total	14,901

Question 17 **Do you have any other comments you would like to share regarding retail stores for recreational cannabis in Ottawa?**

Participants were invited to offer additional comments on retail cannabis stores. 6,662 write-in responses were analysed and catalogued by City staff.

Among 5,156 comments from retail cannabis proponents, the dominant themes included:

Regulations – Proponents offered a number of opinions concerning regulations at the federal, provincial and municipal levels. Among municipal issues, the predominant comments suggested that cannabis is akin to alcohol and tobacco and that the City should not impede legalization by restricting retail sales. Proponents could support restrictions on geographic location, such as distances from schools and other sensitive land uses, provided that such restrictions did not inhibit accessibility. (n = 2,428)

Consumer benefits – Proponents indicate that private retail cannabis stores will provide advantages for accessibility, customer service and personal health and safety. A competitive retail market is expected to provide more options for consumers while also controlling costs. It is further expected that a retail presence will help to remove stigma associated with cannabis consumption. An online only purchasing option is seen as less advantageous to consumers, including concerns over privacy and ease of access. The online only model is

also seen to have higher environmental costs, with increased packaging and fuel consumption. (n = 1,453)

Public Benefits – In addition to anticipated economic benefits, proponents indicate belief that a private retail cannabis regime provides the best option for reducing the black market and associated criminal activity, including cannabis sales to minors. Additional public health benefits are anticipated through improved consumer information and product safety (over black market alternatives). (n = 1,189)

Municipal Benefits – Proponents indicate that private retail cannabis stores will grow the local economy and workforce. They further anticipate that revenue generated through property taxes, service fees and provincial funding could be used to fund local services. These revenue sources are not expected under an online-only sales model. Proponents further expect that legalized private cannabis retail stores will reduce enforcement costs associated with illegal dispensaries. (n = 558)

Among 1,470 responses from retail cannabis opponents, the dominant themes included:

Risk of personal harm – Opponents are concerned that permitting retail cannabis sales will lead to increased use of cannabis, resulting in more health and addiction issues. There is particular concern that retail cannabis will increase youth access, contrary to the federally mandated aim of reducing consumption among young Canadians. (n = 895)

Regulations – Opponents of retail cannabis also offered a number of opinions concerning regulations. The majority of these comments are related to federal and provincial issues, such as legalization (federal) and the choice of a private retail model over a publicly run LCBO-style retail (provincial). The lack of municipal control over the number, placement and conditions of operation for private retail cannabis stores is a significant concern. (n = 442)

Community impacts – Opponents expressed concern that retail cannabis stores will negatively affect surrounding communities through crime and nuisance issues, such as loitering and odour. The number and location of stores are of particular concern, as well as any potential impact retail cannabis sales may have on rates of impaired driving. (n = 276)

Municipal services – Opponents of retail cannabis stores are concerned about the burden these stores will place the City, including costs for social services and enforcement. (n = 107)

Among 50 undecided respondents, there is a clear preference for an LCBO-style retail model with strict controls for geographic locations.

In addition to the above comments, 1,473 comments addressed miscellaneous issues, either related to cannabis but not directly relevant to Council's consideration of private cannabis retail stores (and therefore out of scope) or on entirely unrelated matters.

Demographic profile

As a component of the survey, respondents were asked to volunteer demographic information. Again, this information is anonymous and cannot be used to identify respondents. This data has been used to develop a demographic profile for respondents in comparison to the demographic characteristics of the City. This information was further used to evaluate the responses in relation to independently conducted public opinion research.

Compared to the overall population of the City, participants in the public input process tended to:

- Identify as Male (56% of respondents compared to 48% of population)
- Speak English as their first language (92% of respondents compared to 84% of population)
- Have a higher level of post-secondary education (77% of respondents compared to 66% of population)
- Have a higher level of income (41% of respondents above \$100,000 compared to 33% of population)
- Live in an apartment or townhome, as opposed to a detached dwelling

Responses were representative among Urban, Suburban and Rural neighbourhoods.

Interpretation

- Cannabis consumers and proponents of legalization were more motivated to contact the City and express their opinion. A full 80% of survey respondents supported cannabis legalization, whereas public opinion research indicates 56% ($\pm 3.5\%$) support city-wide.
- Cannabis legalization remains a polarizing issue. Respondents were more than three times as likely to "strongly" agree or disagree on issues than "somewhat" agree or disagree.
- Among self-identified cannabis consumers, 87% prefer to purchase cannabis at a store rather than online.
- Among retail store opponents, 84% are concerned that retail stores will increase youth access to cannabis. Among proponents, only 5% shared this view.

- The survey identified several common misconceptions regarding the regulatory environment for cannabis, including:
 - The City has the ability to determine the number or location of retail cannabis stores. This ability has been restricted by the Province.
 - The City has the ability to regulate the retail cannabis industry through business licenses. This ability has also been restricted by the Province.
 - The City has the ability to collect taxes from local retail cannabis businesses. This is not the case. The province collects tax revenue and determines what portion will be transferred to municipalities.

Public Input From Other Jurisdictions

- From within the National Capital Region, excluding Ottawa, an additional 865 responses were received. Of these, proponents for retail cannabis outnumbered opponents by a margin of eight to one.
- The City received 6,334 responses from other Canadian jurisdictions. Of these, proponents for retail cannabis outnumbered opponents by a margin of six to one.
- The City received 826 responses from the international community. Of these, proponents for retail cannabis outnumbered opponents by a margin of two to one.

Conclusion

In the foundational report “[A Framework for the Legalization and Regulation of Cannabis in Canada](#)”, the Government of Canada identifies nine public policy priorities for cannabis legalization. Of these, three are of particular importance to the retail cannabis debate:

- Protect young Canadians by keeping cannabis out of the hands of children and youth;
- Keep profits out of the hands of criminals, particularly organized crime;
- Establish and enforce a strict system of production, distribution and sales, taking a public health approach, with regulation of quality and safety (e.g., child-proof packaging, warning labels), restriction of access, and application of taxes, with programmatic support for addiction treatment, mental health support and education programs;

In consideration of these public policy aims, the unique perspective of cannabis consumers is of particular importance when evaluating the likely efficacy of regulations as they pertain to these objectives. In this regard, the public input collected to date

indicates that providing a retail cannabis option in Ottawa is likely to provide the best outcome.

Cannabis consumers were highly motivated to contribute public input into the consideration of retail cannabis stores within the City of Ottawa. The disproportionately high number of self-identified consumers indicates that this issue holds importance for them and, whereas the population as a whole is generally divided on the issue, the largely homogenous response of cannabis consumers provides a clear picture of purchasing needs, wants and behaviours.

Specifically, the likelihood that, without retail cannabis, consumers would continue to purchase through illicit means is very high. Nine out of ten cannabis consumers indicate a preference to shop in “bricks and mortar stores” over online purchasing. Additionally, nine in ten indicate that it is likely they would continue to purchase illegally if a retail option is not provided.

It is also important to note that, for some cannabis consumers, purchasing online is not a viable option. Residents that do not possess a credit card, a permanent mailing address, or reliable access to a computer or internet, cannot access cannabis online. Privacy concerns and shipping delays further confound the ability of the Ontario Cannabis Store to fill the needs of the cannabis market.

Diversion from the illegal market, while an aim in itself, is also considered the key to reducing youth access. By removing profitability, it is anticipated there will be less motive to produce and distribute illegal cannabis. While the illegal market is not likely to be eliminated, over time it is expected that youth access will be reduced to levels similar to tobacco or alcohol.

Nearly one-third of opponents to retail cannabis indicated youth access and/or normalization of cannabis use among youth as their primary reason for opposing cannabis sales. As such, enforcement of provincial security, access, signage and display regulations will be crucial and has been addressed within the Province of Ontario’s retail regime.

Additionally, concerns about public safety and community nuisance are also cited among retail cannabis opponents. This concern is highest among low-income residents and seniors.

In conclusion, and on the balance of information available at the time of consultation, public input suggests that the City of Ottawa should proceed with private retail cannabis sales.