



Budtender Survey Results

The Cannabis Council of Canada (C3) launched a week-long survey geared towards budtenders from Jan 4-8th, 2021 to help flesh out some of the considerations being raised by the industry's "frontline" workers, who serve as a conduit between consumers and LPs. C3 received a total of **53 submissions**.

This report will HIGHLIGHT some key takeaways, points, and quotes from the survey.

- **Q: How long have you worked in the legal cannabis sector?**
 - 47.17% (25) of respondents reported *working for less than 12 months*.
 - 43.39% (23) of respondents reported *working for 12-24 months*.
 - 9.43% (5) of respondents reported *working for more than 24 months*.

- **Q: Thinking about the current cannabis marketplace and current rules around packaging and marketing, which three attributes differentiate products the most right now?**

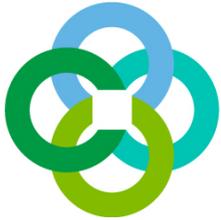
The top 3 choices were:

1. Price (28.25%)
2. Potency (25.64%)
3. Quality (25%)

Followed by:

- Strain (9.62%)
- Brand (3.85%)
- Packaging (3.21%)
- Organic vs non-organic (2.56%)
- Cultivation methods (1.28%)

TAKEAWAY: Products continue to be differentiated by price and potency, contributing to accelerating price degradation on flower, and a "race to the bottom" for LPs – unable to differentiate their offerings in the market. 'Quality' is seen as a subjective measure, and application has not been consistent, depending on the budtender and consumer's experiences, biases/preferences, and knowledge.



We presented three statements regarding the beverage equivalencies, where '70 millilitres of product is equivalent to 1 gram of dried flower' as according to Schedule III of the Cannabis Regulations and asked budtenders to note whether they: agree, disagree or are unsure, for each statement.

1. In your experience, is the current equivalency formula for cannabis beverages sensible?
 - a. 11.32% of respondents *agreed*.
 - b. 83.02% of respondents *disagreed*.
 - c. 5.66% of respondents were *unsure*.

TAKEAWAY: Budtenders overwhelmingly agree that the current cannabis beverage equivalency formula is not sensible, given it focuses on the net weight of the product, rather than the potency – a key issue.

2. The current cannabis beverage equivalency rules encourage consumers to purchase and consume higher potency products.
 - a. 50.94% of respondents *agreed*.
 - b. 37.74% of respondents *disagreed*.
 - c. 11.32% of respondents were *unsure*.

TAKEAWAY: Half of the budtenders agreed that the current cannabis beverage equivalency formula is driving consumers to purchase and consume higher potency products, while more than a third disagreed and 1 in 10 were unsure if this was the case.

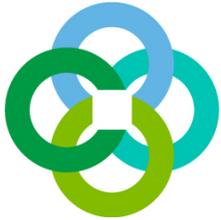
3. The beverage equivalency rules are misaligned with public health objectives.
 - a. 75.00% of respondents *agreed*.
 - b. 5.77% of respondents *disagreed*.
 - c. 19.23% of respondents were *unsure*.

TAKEAWAY: 3 in 4 budtenders agree that the current cannabis beverage equivalency rules are not aligned with public health objectives, but more interestingly, nearly 1 in 5 budtenders was unsure, implying that a significant proportion of budtenders may not be aware of the public health objectives of the *Cannabis Act*, and how current regulations may be undermining those efforts, signalling the need for better education regarding legislation.

We took this further with one more statement regarding the 'applicability' of the existing equivalency formula given format heterogeneity on the market:

- Q: Do you agree or disagree that the current equivalency formula does not reflect the nature of products in different formats?
 - 83.67% of respondents *agreed*.
 - 8.16% of respondents *disagreed*.
 - 8.16% of respondents were *unsure*.

TAKEAWAY: Budtenders overwhelmingly agree that the current cannabis beverage equivalency formula does not reflect the nature of products in different formats, and as the market matures, the lack of understanding on how to apply this formula could continue to undermine public health objectives.



Budtenders had an opportunity to share their views regarding the capacity of current cannabis beverage labelling standards and whether they provide enough information – here is some of the feedback they shared with us:

➤ “Labels are not sufficient; it can often be a confusing and misleading conversation for both consumers and budtenders.”
➤ “I think it needs to be in bigger font for sure, and have the measurements be more consistent – only % or only MG – but % seems to be more understandable for folks.”
➤ “I feel like there could be a little more info upon which strain and if the drink was from sativa, indica or hybrid plant.”
➤ “They provide enough information about the product, but most people are confused why a 2.5mg beverage is equal to 5.1 grams of dried cannabis, yet most edibles containing 10mg are equivalent to less than 1g of dried flower?”
➤ “A numerical % should be standard (instead of decarbed mg/g value to calculate %) along with % indica/sativa.”
➤ “Customers are content with the nutritional information being provided (sugar content mostly), but that’s it.”
➤ “Current labels are taken up too much with a large warning symbol that doesn’t give the consumer enough attention about the information, potency, emphasizing starting slow. The warning labels should be smaller, information should be larger.
➤ “Not enough! Consuming one full 2.5mg beverage is NOT as strong as consuming one full 0.5g joint of 15% THC dried cannabis, but customers sometimes think that is the case.”
➤ “Labels only inform consumer about THC and CBD ratios – that’s it. Missing: Spectrum, Ingredients, Terpene Ratios ...”
➤ “They have clear labels, where with flower or pre-rolls, it gives you a whole bunch of irrelevant information.”
➤ “Basically, labels only provide the Mg of cannabis. No relation to the volume of the beverage, or how to convert mg to % for unknowing clients”.
➤ “It provides the basic health and food information a consumer would need, but it doesn’t explain the weight equivalency formula used.”
➤ “A lot of the time, there are smoking warnings on the labels, when it should be geared towards the non-smoking aspect.”
➤ “Labels simply do not provide enough information. Consumers do not understand why some products count so heavily against their carry limit and others, which are theoretically stronger, do not.
➤ “Fairly informative – labelling isn’t the problem; education of consumers and budtenders is!”



Lastly, we asked budtenders two closing questions.

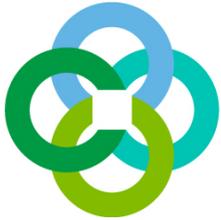
- **Q: How often, if at all, do consumers ask you questions about cannabis products that you are not able to answer because of regulations?**
 - **69.81%** of respondents said *often*.
 - **22.64%** of respondents said *occasionally*.
 - **5.66%** of respondents said *rarely*.
 - **1.89%** of respondents said *never*.

TAKEAWAY: Budtenders note that consumers often ask questions that they cannot answer, due to cannabis regulations, indicating a potential oversight that is hindering consumer education and potentially undermining public health and safety objectives of the *Cannabis Act* if consumers are unable to obtain answers and/or clarification from budtenders of licensed cannabis retailers.

- **Q: If there is anything else that you would like to share, note, or comment on, please use this box to enter your submissions.**

Here are some of the comments that budtenders wanted us to know!

- **COVID-19 Measures:**
 - “Curbside pickup in the current situation is not only hurting those in the industry, but the consumer as well. It is silly that I can walk into the pizza store, dollar store, liquor store etc., but budtenders are subject to layoffs and freezing temperatures for those fortunate enough to remain employed.”
- **Labels:**
 - “All of the products from 2.0 are very misleading with the labels and Health Canada restrictions make it very hard to provide proper information to consumers.”
 - “LP should have to label their products with the spectrum, Terpene percentages and Genetics!”
 - “I would love to know more on the label about options for vegan, allergies and sugar-free.”
 - “Let QR code’s onto packaging – we need to better educate consumers and technology can help us do this.”
 - “I want to know what edibles/beverages are vegan or sugar free on the packages or even allergies for specific customers.
 - “LP’s should be required by law to list the actual strain name on their packaging, not just the marketing-based name they’ve come up with, and terpene content should be listed as well. Consumers have a right to know what they are buying, especially for products that are ingested or inhaled.”



- **Potency:**
 - “Please increase the THC allowance per package. Consumers will be more inclined to purchase edibles if they only need to eat 1, instead of 5 to feel the effects.”
 - “The 10mg THC limit per package needs to be raised.”
 - “It would make sense to raise the limit on mg/ml or per piece in edibles.”
 - “Edible mg should be higher, and prices should be lower on drinks if they want to keep the mg that low.”
- **Equivalencies/Public Possession Limits:**
 - “Beverage equivalencies in dried flower make no sense. Right now, I can only buy 5 of the 2.5mg drinks but I can get 30 10mg chocolate bars or 7 grams of a concentrate that is anywhere from 30-90% THC content or 1000 10mg packs of dissolvable THC powder (seriously!). Not to mention there is NO LIMIT on the amount of alcohol a person can buy. Who makes this up?”
 - “Buying 12 or 24 cans at 2 mg THC or CBD-only for a long weekend does far less harm than an ounce of flower smoked or bottle of oil ingested!”
 - “The weight of a beverage should not be how the potency is judged. If a drink is 2.5 mg and we can sell max 5 a transaction that means 10mg is the maximum that we are allowed to sell. Using that logic, how am I able to sell 45 edible chocolate bars? The LCBO can sell hundreds of litres of very potent alcohol and no one bats an eye. Cannabis is not a killer, alcohol is, so why are we still more encouraged to drink?”
 - “The weight of the cannabis beverages needs to change, especially in comparison to THC oils, and equivalency issues exist with the topicals as well!
 - “I’d like to see higher limits; 30 grams is not enough especially the way drinks add up.”
- **Communication:**
 - “We should be allowed to make personal recs and talk about the products we have tried. I spend a lot of time and money learning about the products but then I have to talk about them second hand like some imposter - it makes me look less credible.”
 - “So many restrictions that is hard to talk to consumers. Even when it could help them. Makes it seem like we as budtenders are uneducated.”
 - “There are clearly medical benefits to cannabis - otherwise there would be no such thing as medical cannabis. The fact we can't even mention it makes dispensary staff look uneducated about the products being sold at best, and like we're selling snake oil at worst.”
- **Diversity and Inclusion:**
 - “The cannabis industry needs more diversity and also inclusion.”
 - “Some people have disabilities and cannot roll, prerolls can be very expensive! I would love to be able to offer a rolling service one day. Like we used to be able to do in the legacy market.”