



Department of
Cannabis Control
CALIFORNIA



Research Report

Californians & Cannabis



What do California's
Cannabis Consumers Think
About the Importance of
Purchasing Cannabis from
Licensed Retailers?

About the Research

The Real California Cannabis Campaign is educating existing consumers about the importance of purchasing cannabis exclusively from licensed retailers and the potential harms of purchasing cannabis from unlicensed sellers. To help assess Californians' attitudes toward cannabis and consumer understanding of the legal cannabis market, the Department of Cannabis Control (DCC) commissioned a statewide poll and regional focus groups.

Statewide Poll

The poll was conducted from August 4-14, 2023 and surveyed 1,048 California adults ages 21 and older via telephone and online interviews to assess Californians' baseline understanding of the legal cannabis market.

Regional Focus Groups

A total of 98 Californians ages 21 and older participated in 10 focus groups across California from May-June of 2023. Each session's participants included roughly half who self-identified as regular or frequent cannabis users, and two sessions were conducted in Spanish. The focus groups were conducted to develop a qualitative understanding of Californians' sentiments regarding the legal cannabis market.

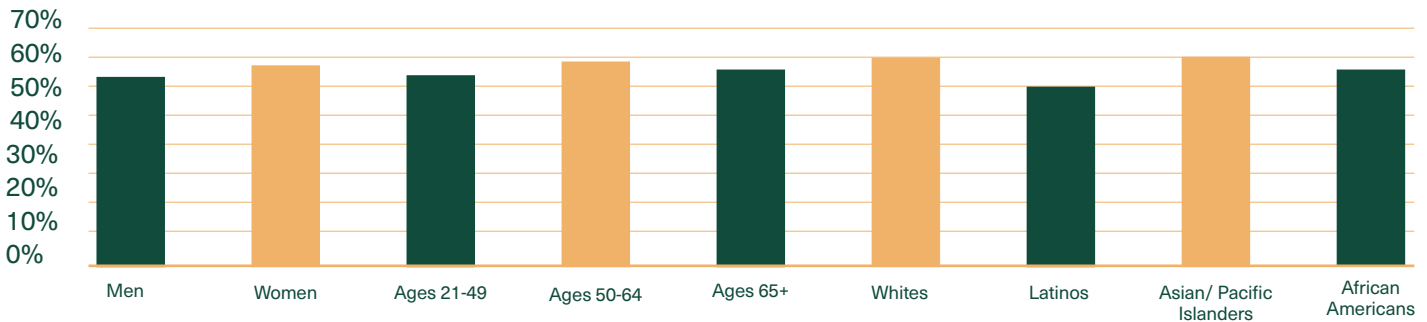
THE LANDSCAPE

Universal Appeal



Our research shows cannabis consumers are as diverse as California — **there are no dramatic demographic differences in those who have and have not used cannabis**, nor are there significant variations by region, income level, education level or those with children. Whether we are talking about age, gender or race, **a majority of California adults over age 21 consume, or have consumed, cannabis.**

Cannabis Consumers by Age, Race, Gender & Ethnicity



56%
HAVE USED
CANNABIS

56% of respondents said they have used cannabis in their lives, including **26%** who said they have used cannabis in the last six months.

- Of those who report consuming in the past 6 months: 16% consume daily, 9% weekly, 9% a couple times per month, and 48% occasionally/infrequently.

WHAT THEY'RE SAYING

"Marijuana is not a derogatory thing in my mind. It's a plant; a lot of people use it."

Fresno Male Focus Group Participant

"I think it's something that used to have some sort of negative connotation that came along with it, but nowadays, it's not an issue socially."

San Francisco Male Focus Group Participant

"For me, it was really awesome to see that it was finally accessible. I felt like it was destigmatized."

Irvine Female Focus Group Participant

THE PROBLEM

Consumer Confusion



Our research shows Californians do not understand the scale and impact of California's illegal cannabis market. This misunderstanding is often driven by a key disconnect: if Proposition 64 made cannabis legal in California, how can illegal retailers exist? Most Californians generally assume that any cannabis retail store open to the public must be licensed, otherwise law enforcement would've shut it down. As a result, most people who purchase cannabis are not motivated to verify the legality of a store before visiting it and assume the products they are purchasing are legal.

62% of respondents believe the passage of Proposition 64 and the legalization of adult use cannabis has had a positive impact on the state. **71% of respondents** between ages 21-49 said that it had a positive impact along with **67% of African American respondents** (both represent the highest favorability groups).

85% of respondents who live in areas where dispensaries are not permitted either incorrectly believe their local government allows cannabis dispensaries to operate in their area or did not know whether it was permitted.

44% of respondents said it was easy to identify a licensed dispensary while **42%** said it was difficult to identify a licensed dispensary.



WHAT THEY'RE SAYING

"Because if it's legal in the state of California, then why would a community deny?"

Fresno Female Focus Group Participant

"I'm not sure if it's legal in Alhambra or not. I've never seen any dispensaries but there's so many in Pasadena or just right over in L.A."

Los Angeles Female Focus Group Participant

"If I see the establishment, I see it's open and it's in the public, I would imagine that it's legal. They have to have their regulations."

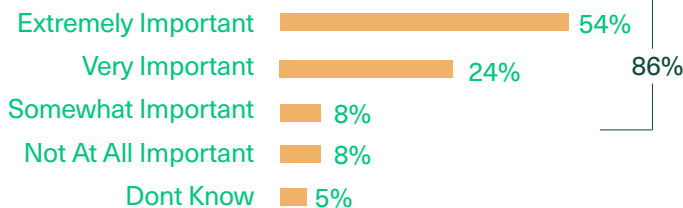
Fresno Male Focus Group Participant

THE SOLUTION

Get Existing Consumers to Purchase Legally

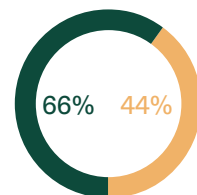
Most cannabis consumers say they would purchase cannabis from a licensed dispensary — yet we know the illegal market continues to account for a significant share of California cannabis sales. While consumers overall want to do the right thing by purchasing legally, they simply do not have universal access or lack the knowledge to do so.

86% of respondents believe it is important to purchase cannabis legally (54% said it was extremely important, 24% said it was very important and 8% said somewhat important).



72% of respondents said consumers have a responsibility to make sure they buy cannabis from licensed dispensaries that operate legally.

66% of respondents said they would likely purchase cannabis from a legally operating licensed dispensary, including **53%** who said they would be very likely.



88% of respondents who identify as cannabis consumers said they would purchase cannabis products from a licensed operator.



88%

OF CANNABIS CONSUMERS WOULD LIKELY PURCHASE CANNABIS LEGALLY

WHAT THEY'RE SAYING

"I feel that regulation is important, and it lends to quality control for safety."

Fresno Female Focus Group Participant

"For instance, when they're growing, everything has to be tracked, so from a seed to the plant to finalizing everything and just the culture of it to make sure that there's no mold and it's treated in the right way."

San Francisco Male Focus Group Participant

"Because they're going to control what is put into the product and how it's handled, how it's manufactured, how it's packaged."

Los Angeles Female Focus Group Participant