



# REGULATORY DETERMINANTS OF CANNABIS OUTCOMES SURVEY

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CONSULTING

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## Letter from the Directors

Cannabis Public Policy Consulting has aided in the safe and effective regulation of cannabis for over a dozen clients. Over the past few years, our team has become increasingly recognized as leaders in the field of cannabis legalization, responsible for implementing programs that meet the needs of public health, social equity, and public safety. As technocratic public health professionals, we take this responsibility seriously.

On the precipice of widespread cannabis legalization, we are persistently asked about the impact of cannabis legalization to date. In research, very few bodies of evidence are definitively conclusive. The impacts that cannabis legalization has had on economic, public health, or social outcomes is no exclusion. In short, our answer to this question is simply “we just don’t know yet.”

Over the course of the last year, we have become unsatiated with our answer. From what is available in preliminary data collection, we are watching the outcomes related to cannabis legalization across the country evolve rapidly. So much so, even the most superior data surveillance is being significantly outpaced. Frustrated by the lack of comprehensive and representative data on the cannabis industry, and in the absence of evaluations on cannabis regulatory efficacy, we have taken this responsibility into our own hands.

We have set out to understand if there are regulatory determinants to cannabis-related outcomes, and if there are, how can we improve regulations and cannabis legalization to induce better outcomes. The findings of this report are preliminary – representing the first issuance of the Regulatory Determinants of Cannabis Outcomes Survey (RDCOS). The survey will be issued three more times throughout the year. The quarterly issuance increases our sample size, increasing the representativeness of the population and therefore the validity and accuracy of the findings. Further, issuing the survey quarterly enables us to understand outcomes as they relate to time periods and cannabis production cycles, and allows us to keep pace with the speed of outcome changes.

**In our first issuance, our findings detailed in this report well surpass that of all relevant surveillance to date. That said, the findings in this report should not be misconstrued to be in advocacy of prohibition. In fact, this initial data analyzed in association with cannabis laws provides reason to believe that states with cannabis legalization may have more desirable outcomes than those with states that do not.**

While we will release a handful of reports and insights for purchase from this survey, we are intentionally withholding any analysis that suggest correlation of legalization and specific policies to cannabis-related outcomes until we have completed all four rounds of survey issuance and are able to validate our findings. It is of note that this report is a pilot report, and only showcases a selective handful of preliminary findings. If you are interested in receiving more comprehensive or ongoing insights from the RDCOS survey, please reach out to [msslade@cannabispolicyconsulting.com](mailto:msslade@cannabispolicyconsulting.com).

Better data. Better policy. Better outcomes.

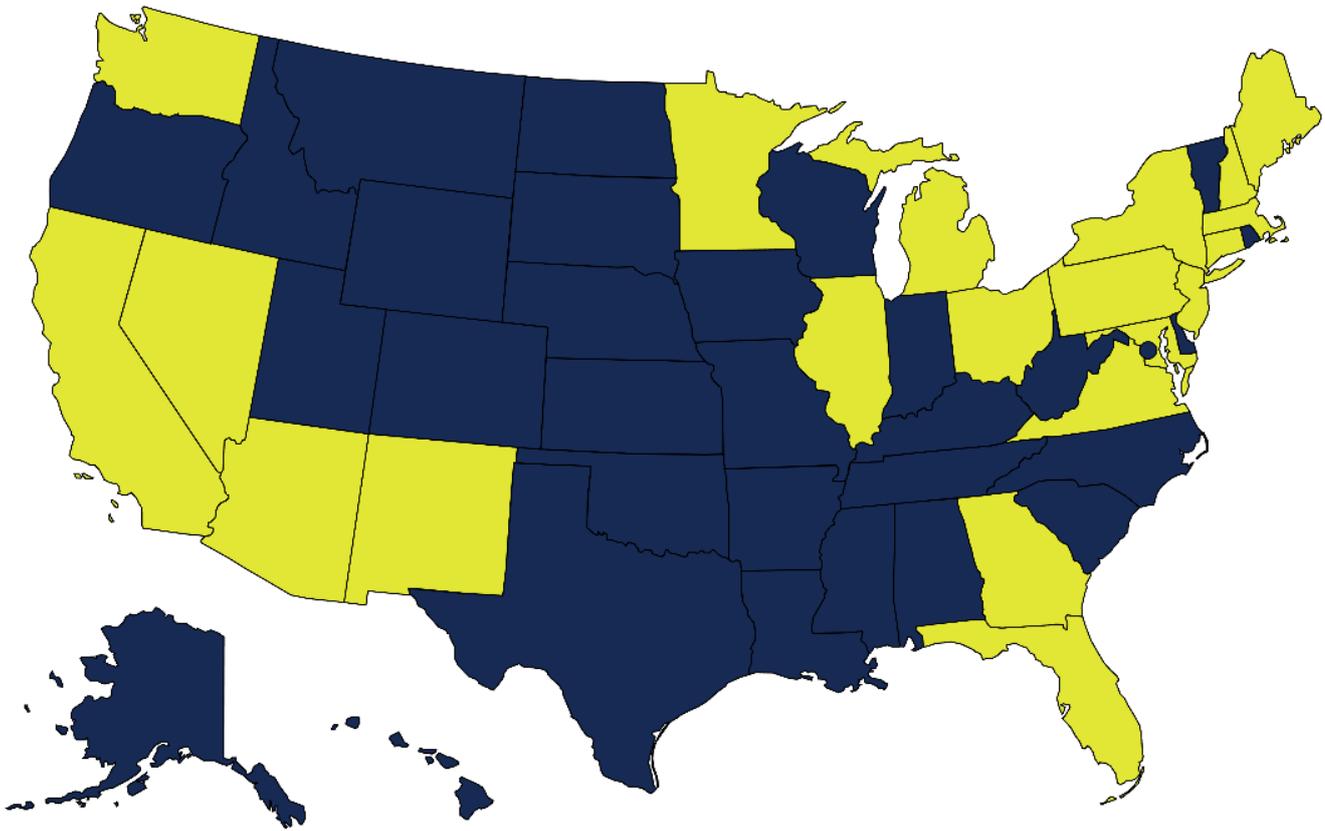
Sincerely,



Michael Sofis, PhD  
Director of Research



Mackenzie Slade, MPH  
Director



## BETTER DATA. BETTER POLICY. BETTER OUTCOMES.

This April (2022), Cannabis Public Policy Consulting (CPPC) launched the Regulatory Determinants of Cannabis Outcomes Survey (RDCOS), a quarterly assessment of cannabis health, market, and social outcomes in the United States in over 20 states with legal cannabis laws. Over the course of the next several months, CPPC will launch several reports with the most reputable data insights on themes such as:

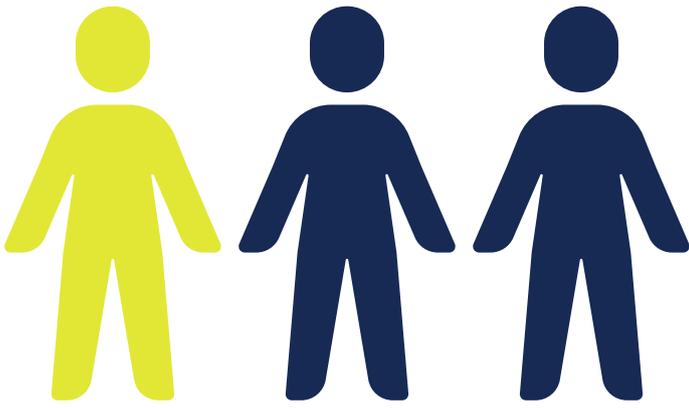
- Cannabis use in the workforce
- Social equity
- Public health and safety
- Revenue, price sensitivity, demand elasticity, and supply
- Consumer behavior and product selection
- Cannabis regulated and illicit market source amounts
- Impacts of cannabis laws and regulations on cannabis health and market outcomes

With over 200 cannabis-related outcomes available in the RDCOS, there will be no shortage of insights for governments, businesses, researchers, and stakeholders alike.

Prior to launching the RDCOS nationally, we successfully piloted the RDCOS in two states. We used the findings to draft and improve cannabis policies such as setting plant limitations for cultivators to meet consumer demand, identifying optimal zip codes for program expansion to diminish illicit market thrive, and enabling healthcare systems to appropriately intervene on problematic cannabis use.

The intent of the RDCOS is to equip policymakers, businesses, and researchers with the most representative, accurate, and up-to-date insights on cannabis outcomes in real-time, enabling data-informed decision-making.

This pilot report presents initial findings from our first wave of the RDCOS, which includes findings on cannabis use prevalence among 13,000 U.S. residents ages 16 and older from the general population in states with legal cannabis laws. In addition, we highlight several notable findings from 5,500 survey participants who have used cannabis at least in the past year. Below, we highlight key findings that underscores how rapidly cannabis is changing in today's modern cannabis world.



## POPULATION PREVALENCE OF CANNABIS USE

In states with medical or medical and adult use laws, data from the RDCOS suggests that almost 1 in 5 U.S. residents ages 16 and older use cannabis daily or almost daily. Moreover, 1 in 3 use cannabis at least monthly, which is a much larger estimate than the prevalence of past month cannabis use reported by one of the most commonly used federal surveys that assesses cannabis use (i.e. the National Survey on Drug Use and Health).

**1 IN 3**

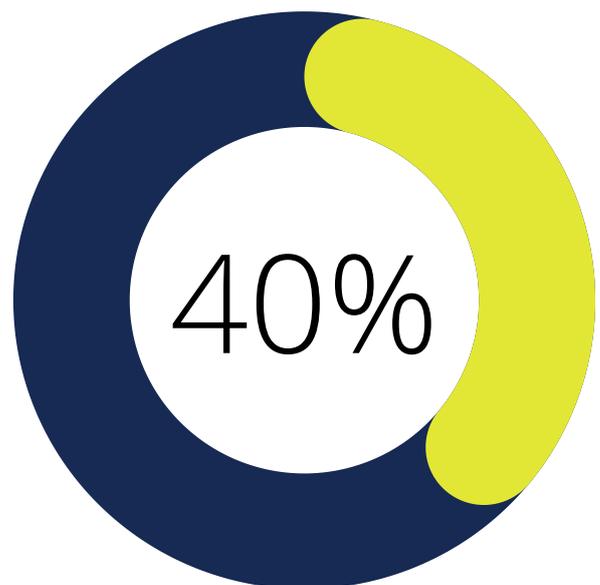
**U.S. RESIDENTS AGES 16+ IN LEGAL CANNABIS STATES USE CANNABIS AT LEAST MONTHLY**

## CANNABIS IN THE WORKPLACE

Among those who use cannabis at least monthly, about 19% used while on the job at least once in the past month. Notably, about 1 in 5 workers in the transportation industry reported using cannabis while on the job, and 1 in 8 workers reported using before and during work in the past month. Use of cannabis does not necessarily mean impairment, but using cannabis before and during work certainly would increase the odds of impairment that could negatively impact safety.

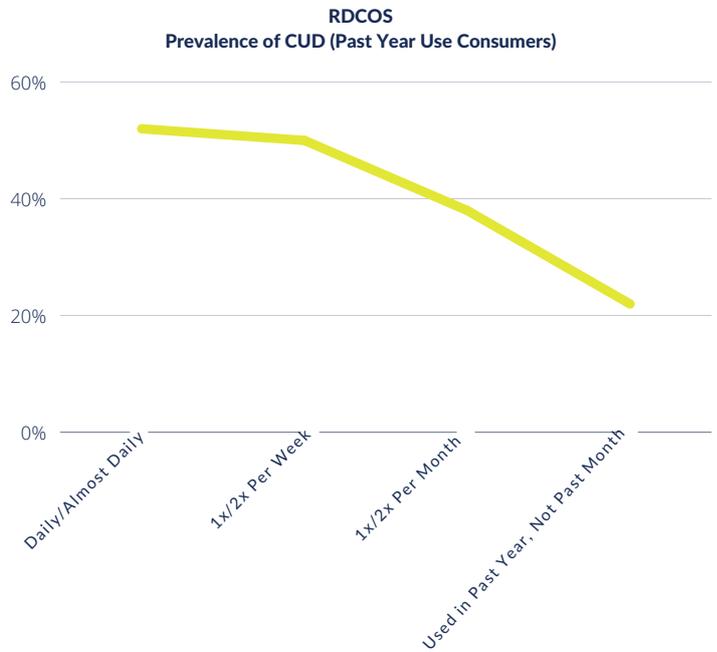
## DRIVING UNDER THE INFLUENCE

Data from the first RDCOS assessment shows that about 40% of those who used cannabis in the past year drove under the influence of cannabis in the past month. On average, those individuals reported driving under the influence at least 2 days in the past month. Both metrics are much higher than previously thought, and suggest there is considerable work to be done to help prevent driving under the influence of cannabis.



# CANNABIS USE DISORDER

The RDCOS findings suggest about 1 in every 2 individuals who use cannabis daily or weekly meet criteria for cannabis use disorder (CUD). Based on our cannabis use prevalence data, about 1 in every 7 adults (ages 16+) in states with legal cannabis laws is likely to meet criteria for CUD.



# CONSUMER SPENDING AND TRENDS

About 39% of those who used cannabis in the past year in legal cannabis states said the price of cannabis was the single most important factor that influenced their cannabis purchasing decisions. The second most commonly cited purchasing factor was the level of THC potency in products. On average, those who used cannabis in the past year spent about \$75 per month on cannabis. Over half of participants perceived getting access to illicit cannabis as easy or very easy, which is consistent with other findings that suggest that illicit cannabis has not been adequately curtailed in many states with legal cannabis laws.

# SOCIAL EQUITY

Of the 362 individuals who reported applying for a cannabis license as a social equity applicant, 34% received expungement for a cannabis related crime, which suggests potential progress in social equity efforts from a nationwide perspective. The most commonly cited barrier among social equity applicants was a lack of financial assistance/funding (45%), issues finding the right location (34%), and worries about too much business competition (31%).

