

CANNABIS INSIGHTS

Committee



Committee: Dave Scholz, Partner, Leger (ON); Craig Worden, CEO, Pollara & Mubashera Kothawala, Associate Vice President, Pollara (ON) Borna Zlomavilk, Senior Vice President, Growth, Organigram (ON) & Christy Zhou (BC); Mike Rodenburgh, Executive Vice President, Ipsos (BC); Vivianne Wilson, CEO, Green Port Retail (ON); Timothy Cornelius, Head of Audience, QuestionPro (USA); Jarred Cohen, Canadian Chamber of Commerce (ON); Diana Lucaci, True Impact; Jessica Chee-Ying, Consumer insights Manager, Canopy Growth (BC); Justin Pray, Senior Consumer Insights Manager, Aurora (ON); Jenn Petell, Vice President, Medical Research, Schlesinger Group (USA); Lucas McCann, CSO and CoFounder CannDelta; Lead and Facilitator Arundati Dandapani, CIO, CRIC and COO, CAIP (ON) [*Meeting/s will be recorded for internal reference.]

Agenda Item	Decision / Action
<p>1. Welcome to the Committee – our role in industry, news or updates and link on website (5 mins)</p>	<p>Members shared their roles in the industry, how they work with, in or around research and what their hopes from the committee were:</p> <p>Efficacy: Get some clarity on what researchers can do from a product test perspective. What can we do on the site of the LP, home usage test, other product test categories. HC regulations overzealous for potential harm and liability associated with a recreational product. LPs will have more sway with Health Canada and need more of those on the Committee. LPs have well-developed GR people to effect change in HC. Need more LPs.</p> <p>Having more industry-specific CRIC members: Being exposed to what the committee is doing, what the best practices are, advocacy to players in the industry to be part of CRIC. Directors of insights don't have research background and are setting questionable practices.</p> <p>Concerns about difficulty with getting a research license: Home usage tests are out of question (consumer is shipped a product and you ask them a post-consumption experience survey) as this is</p>

prohibited by Health Canada. The consumption can only be done on the site of an LP. Requirement that the product be consumed on site of LP is the biggest thorn. If we wanted to do blind focus groups with consumers in a qualitative setting we can't do it on the clients' site and be blindfolded – clients are hesitant because it seems illegal.

There are ways to get around the Smoke Free Ontario Act to have people vaping indoors if need be.

Cannabis Research Sensory Study License allows you to store, dispense and help to administer products marked for research on the site – as long as you are not asking participants about the level of impairment. CannDelta does this at retailer shops to host tasting parties on behalf of LPs to raise awareness about products and provide taster feedback to them as a service. The retail store is adjacent to or has a different address from the retail unit. Opportunity: Lucas and retailer can share case study of how this operates.

Research license from Health Canada can now be obtained in as little as 1-2 months – 5 years validity. Once you've registered a participant they can participate several times without going through that initial registration process. A research license is associated with an address.

There's an intentional knowledge gap. Sensory research license has been more popular in the past year. Quality of research in LPs suffers more out of the lack of knowledge of research best practices.

There appear to be added administrative hurdles to getting a research license approved for conducting a focus group, but it is possible. Mailing cannabis to consumers for in-home use (post-consumption survey context) is still prohibited.

The key problem is a twofold knowledge gap:

	<p>1. What types of research require a license and what is the process to obtaining such?</p> <p>2. What are the high-quality research practices and guidelines that must be promoted among CRIC members regarding the conduct of cannabis research?</p> <p>LPs would buy all kinds of research licenses. Sensory research license has been more common in the last year.</p> <p>Reputation in a new category:</p> <p>Lack of knowledge around research techniques and tools in the cannabis researcher – it can be a market opportunity for CRIC members. Reputation is new in this industry, on brand memorability or differentiation, so reputation management for cannabis brands can be challenging.</p> <p>Medical and wellness cannabis research:</p> <p>Challenges about user testing, eye towards regulatory aspect. Patient research is more attitude and opinion based. Money is in the recreational side.</p>
2. Terms of Reference of the Committee – any additions or feedback (5 mins)	Have more industry specific objectives and activities and beware of taking on the full scope i.e., recreational and medical. Focus on the business research needs in the evolving cannabis sector.
3. Research Challenges in the Cannabis Sector (15 mins) <ul style="list-style-type: none"> - Pandemic related challenges - Offline retail challenges - Illicit versus legal market size issues 	<p>Focus on:</p> <ul style="list-style-type: none"> - Consumer insights (attitudes, opinions) - Sensory research and product testing research - Quantitative and Qualitative

<ul style="list-style-type: none"> - Poor quality tools in the cannabis researcher's toolkit. 	<ul style="list-style-type: none"> - Measuring stigma, ambivalence - Growth and market size
<p>4. The Cannabis Act – Gaps and Opportunities (branding / advertising, product testing, medical/recreational, other) (15 mins)</p>	<p>Challenges persist with branding limitations and advertising restrictions. Work with groups like CCC, Langara, U of Alberta, Fangshawe, NORML where relevant to share and cross-promote research.</p>
<p>5. Working with non-Canadian markets (US, Germany, UK, etc.) (2-5 mins)</p>	<p>US legalization – two members keeping eye on regulatory aspect.</p>
<p>6. Deliverables for 2022 – what do we want to achieve in the next year? (e.g. Moving for relaxation of product testing restrictions, guidelines around researching cannabis, webinar / longer-format conference, industry survey) (9 mins).</p>	<ol style="list-style-type: none"> 1. Create knowledge pieces for membership around research license procedures, and current ethical practices in cannabis research. 2. Host a virtual research conference webinar style on October 17 of this year to draw wide attendance and interest to research implications (challenges, opportunities) for the 4th year anniversary of legal cannabis in Canada. Produced in conjunction with our partners.
<p>7. Next meeting (Feb 2022? Week of 21st) and next steps (1 min)</p>	<p>Meeting # 2 is on Feb 25, 4 pm EST</p>