Cultivating Success in the Canadian Cannabis Business

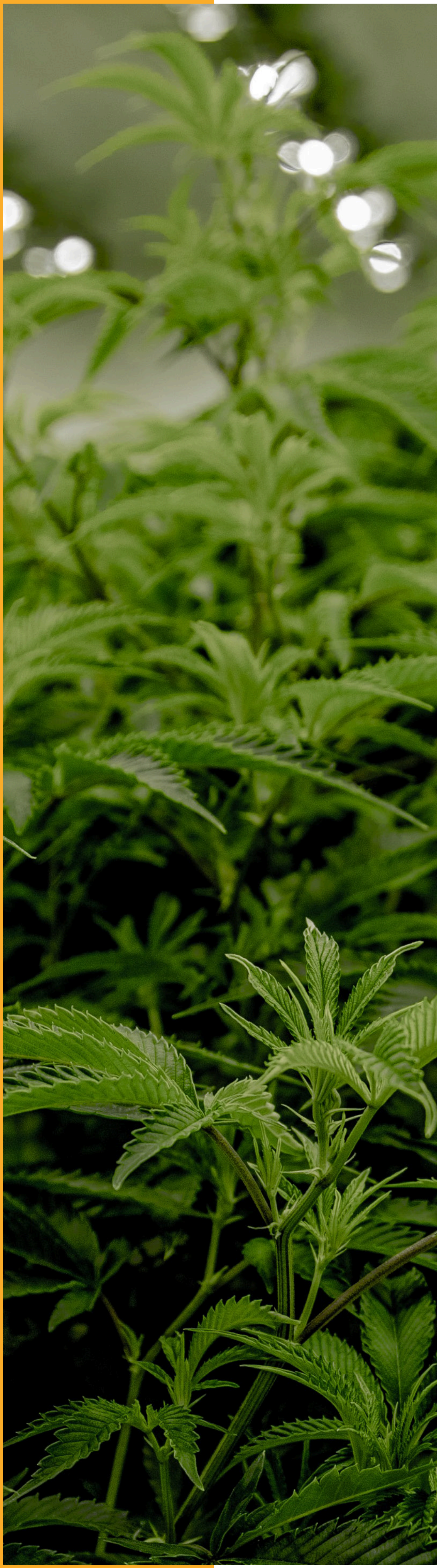
Deep Roots in Consumer Insights & Need States are Key to Unlocking Cannabis Retail Growth

5 Reasons You Need to Talk to Caddle

1. Canadian consumers are changing faster now than ever before.
2. You want to understand the "**Next Normal**" not the "**New Normal.**"
3. You're concerned that you're losing market share to new competitors.
4. All the intel you get is based on past results or U.S. market data.
5. You've been tasked with coming up with the next great innovation.

Canada's largest daily active consumer panel across all verticals and need states, specializing in a sub-panel of cannabis consumers of 10,000+, plus 6-figure monthly active respondents

Get better business insights, faster, with Caddle. **Contact us today.**



Contents

Canada's Largest Cannabis Panel

Engage with 18,000+ monthly active cannabis users (including 6,000+ daily active cannabis consumers) and get the insights you need to make decisions, faster!

We conduct monthly screening for attitudes, behaviours, purchases and consumption patterns, so you can connect with every type of cannabis consumer at any time.

Key drivers include: preferred format, incidence rate, brand preference, key occasions, purchase intent, and at-shelf drivers.

Gain access to insights on both macro and niche cannabis-related topics, including:

- Attitudes on Legalization
- Black Market Consumers
- Brand Preferences
- Cannabis & Health
- Cannabis & Other Vices
- Cannabis Marketing
- Cannabis Occasions & Activities
- CBD vs. THC Opinions
- CBD-Centric Consumer Attributes
- Commerce & Retail Trends
- Consumption Trends
- COVID-19 Industry Impact
- Daily Consumer Attributes
- Demographic Profiles
- Fitness & Cannabis
- Medical vs. Recreational Consumers
- Multi-Format Consumer Attributes
- Premium Consumers
- Product Type & Format Preferences
- Purchase Behaviours
- Response to Innovation
- The Canna-Curious
- Value Consumers
- Women & Weed

And, we've got you covered for health-related information too, with in-depth data on:

Smoked Products

- Flower
- Pre-Rolled Joints
- Vape Pods
- Vaporizers

Data includes:

- Reasons for Cannabis Use
- Frequency of Cannabis Use
- Cannabis Perceptions & Associations
- COVID-19 & Cannabis
- Interest & Knowledge of CPD for Health
- Opinions on Legalization

Non-Smoked Products

- Confectionery
- Edibles
- Gel-Caps
- Infused Beverages

Data includes:

- Alcohol Consumption Habits
- Tobacco/Hookah Consumption Habits
- Treatment for Health Concerns
- Anxiety
- Arthritis
- Body Aches & Pain
- Chronic Pain
- Depression
- Headaches
- Migraines
- Restlessness

Introduction | Cannabis is a Go-To for Ailing Canadians

From headaches and migraines to arthritis, anxiety and beyond, a rising number of Canadians of all ages are dealing with chronic ailments that interfere with their daily lives.

For years, Canadians have resorted to taking prescription medications to relieve these types of health conditions. Unique remedies get introduced every day, including new classes of over-the-counter (OTC) medications as well as a wider array of health-oriented products, cannabis-based treatments and functional foods and beverages. This is leading to a steady evolution in consumer perceptions on the efficacy of "alternative" healthcare products for chronic health conditions.

As adoption continues to increase and additional products become available in the Canadian marketplace, it's incumbent on manufacturers and retailers alike to plan for a future where consumers demand a wider array of treatment options for their chronic health conditions.

That's why Caddle has created this whitepaper: Featuring insights gained from our 10,000+-member Daily Panel Surveys and our 18,000+-person Canadian Cannabis Panel, we aim to educate the marketplace on the use of various treatment products and approaches for chronic conditions that Canadians suffer most from—headaches and migraines, chronic pain, arthritis, and anxiety and depression.

We're particularly interested in whether Canadians have shifted their long-standing reliance on OTC and prescription medications for alternative treatments. (Here's a hint: Those who suffer from a specific ailment are more open to using cannabis by-products, especially if they're from younger generations.) We also take a closer look at infused "functional" beverages, as they're set to flood the marketplace in the coming months.

Finally, we offer key insights that can help both manufacturers and retailers to change the conversation on cannabis use from typically occasion-based and experience-enhancing to health-oriented and functionally effective.

14% of Canadian consumers use cannabis by-products daily and a further 16% consumer cannabis multiple times per day.[1]

Functional Foods & Beverages are products that have an added physiological benefit above and beyond their naturally occurring, nutritional benefits (e.g., Chocolate bars boosted with added protein; sparkling water infused with cannabis). *Check out page 12 to learn more about the growth potential for functional/ infused beverages.*

The 2 Active Ingredients in Cannabis:

- Tetrahydrocannabinol or THC is the principle psychoactive compound responsible for the "high" associated with cannabis consumption.
- Cannabidiol or CBD is the non-psychoactive compound that's used for a range of therapeutic purposes, including in treatments for multiple sclerosis, arthritis and chronic pain.

Defining “Cannabis By-Products”

The Canadian market is rife with different products that are made with or are derivatives of cannabis and it can be confusing for industry insiders who aren’t as familiar with the breadth of products that are currently available or are coming soon.

This chart differentiates between some of the most common cannabis products used by Canadian consumers today.

Cannabis By-Product	What Is It?	Format(s)	How Is It Taken?	Use(s)
Flowers	Smokable part of a cannabis plant; also known as nuggets, nugs or bud; most popular form of cannabis due to its multiple consumption methods	Ground then rolled into cylindrical or cone-like joints, pre-rolls, blunts or consumed using pipes, bongs, vapes	Inhalation	Recreational and medicinal, depending on composition and concentration of cannabis
Vapes	Battery powered devices that heat a substance until it produces vapour, which is then inhaled; different from smoking, where cannabis is burned	Cartridges; pens; pods (some disposable, some not)	Inhalation	Recreational and medicinal, depending on composition and concentration of cannabis
THC Oil	Tetrahydrocannabinol oil extracted from the plant; associated with psychoactive and intoxicating effects of cannabis	Oil or tinctures dropped under the tongue or sprayed in the mouth; e-liquid for vaping	Ingestion	Most often recreational
CBD Oil	Cannabidiol oil extracted from the plant; typically includes low to no traces of THC, so delivers no psychoactive reaction	Oil or tinctures dropped under the tongue or sprayed in the mouth; e-liquid for vaping	Ingestion	Most often medicinal; for relief from epilepsy, chronic pain, anxiety, depression, cancer pain, sleep issues
Infused Beverages	From colas and fruit punches to seltzers, coffee, tea and cocktails, the terpenes in cannabis offer a range of aromas and flavours that appeal to different consumers	Cans, bottles and other typical beverage formats, with more coming in the months ahead	Ingestion	Most often recreational
Edibles	Baked goods and confectionery products that contain varying concentrations of CBD and THC	Packaged brownies and cookies; soft gels and gummies; truffles and chocolates	Ingestion	Recreational and medicinal, depending on composition and concentration of cannabis

Perceptions Influence Consumption

By the time the federal government officially legalized cannabis cultivation, possession, acquisition and consumption with Bill C-45 ("The Cannabis Act") on October 17, 2018, many consumers had already had experience with cannabis and its by-products. After all, cannabis has been used as an ingredient in doctor-recommended medicines and tonics since the 19th century!

Fast-forward to today, and a significant proportion of Canadians are consuming the plant in its various formats, including nearly 60% of Millennials and 25% of Gen Xers in our 18,000-person Cannabis Panel.[2] In fact, almost 14% of the general population consume cannabis at least daily, and a further 16% use cannabis multiple times per day.[3]

Yet, even with this frequency, only a small proportion of cannabis consumers (18%) use it purely for therapeutic purposes[4] (78% of which are Gen Xers and Millennials). This suggests that Canadians still regard cannabis consumption as more recreational in nature—even though it's been approved by doctors for treatment of conditions like epilepsy, multiple sclerosis and chronic pain, and to ease the side effects of chemotherapy and other cancer treatments.[7]

Cannabis By-Products that Most Interest Canadian Consumers

Cannabis Users[5]

- Edibles (27%)
- Joints (25%)
- Vaping (11%)

Cannabis Non-Users[6]

- Edibles (21%)
- Capsule/Pill (11%)
- Lotion/Topical (9%)

This is further reinforced by the activities that Canadians associate with consuming cannabis—though admittedly, it varies slightly based on whether the respondents are cannabis users or not. Health-related concerns, including relaxing and sleeping, are among the top three associations for cannabis users. In contrast, non-users seem to view cannabis consumption as a pathway to recreational endeavours, such as socializing.

Top 3 Activities Associated with Consuming Cannabis

Cannabis Users (n = 5,330)

1. Relaxing
2. Sleeping
3. Watching TV

Cannabis Non-Users (n = 13,572)

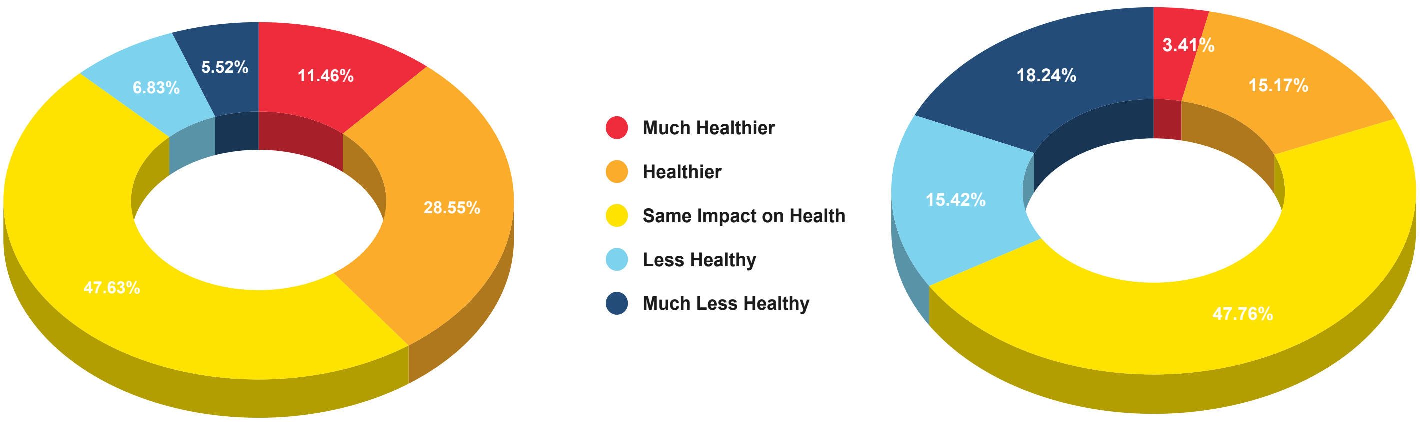
1. Socializing
2. Relaxing
3. Other

The question then is:

If few people associate cannabis with its therapeutic applications, how do they view its consumption relative to other intoxicants/non-cannabis-based consumables?

Q: Compared to tobacco/hookah smoking or nicotine vaporizers, I believe cannabis is...

Q: Compared to alcohol, I believe cannabis is...



Date: October 2-25, 2020

*Filtered to those who identified themselves as cannabis non-users
n = 13,572

Indeed, among Canadian non-users (i.e., those who haven't consumed cannabis in the last 12 months), about 40% believe that using cannabis is "healthier"/"much healthier" than smoking tobacco/hookah or nicotine vaporizing (including more than 45% of Millennials and nearly 34% of Gen Xers) and 19% believe that it's "healthier"/"much healthier" than drinking alcohol (including more than half of Millennials and nearly 30% of Gen Xers).[8]

Want to know more? Engage our 18,000-person Cannabis Panel today!

Does price sensitivity come into play around cannabis use? Not significantly, as nearly three-quarters of cannabis non-users believe that cannabis products are the "same price" or "more expensive" than alcoholic products, while about 70% say that cannabis is the "same price" or "more expensive" than tobacco/hookah smoking.

Keep these perceptions in mind as we delve into different health conditions experienced by Canadians and whether they seek relief in OTC and prescription medications or alternative health treatments, including cannabis-based products or functional foods and beverages.

Chronic Health Conditions & How Canadians Choose to Treat Them

Headaches & Migraines

Just about everyone experiences headaches from time to time. Yet, triggers like high levels of stress, poor sleep and fatigue can contribute to increased frequency and intensity of headaches. So much so that 1 in 3 Canadians "often" or "always" experience headache pain.[9] (Note: This is likely also indicative of the heightened emotional and physical toll that COVID-19 has taken on people through 2020 and is only expected to worsen into 2021.)

When episodic headaches (i.e., those that occur fewer than 15 days per month) become more intense or more frequent, they're often re-categorized as migraines.

Chronic migraines affect an estimated 2.7 million Canadians[10] and are recognized by the World Health Organization (WHO) as equally disabling as schizophrenia, terminal cancer and other major conditions.[11] They're so common, in fact, that the Canadian Headache Society launched the Canadian Migraine Tracker app to monitor frequency, symptoms and the results of treatments.

Canadian Gen Zers are one of several age groups that experience headaches at an alarming rate—40% suffer "often" or "always."[12] (Compare this to the general population, 30% of whom "often" or "always" experience headaches.)

"Is This a Headache or a Migraine?"

It could be both! Migraines are a type of headache that can last for several hours up to a few days. If a headache comes with 2+ of the following symptoms, it's likely a migraine:

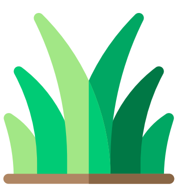
- Nausea
- Light sensitivity
- Problems doing usual activities during headache attacks

Meanwhile, of those that get migraines, more than 65% suffer "often" or "sometimes,"[13] including 66–70% of Gen Xers, Gen Zers and Millennials.

Because headaches and migraines are difficult to diagnose accurately and even harder to treat effectively, medical professionals often prescribe OTC medications to alleviate patients' symptoms. However, painkillers like ASA, acetaminophen and ibuprofen are not meant to be taken for more than 15 days per month,[14] as they can cause other medical complications and can even make headaches worse or harder to manage.

And while OTC is still king among headache sufferers—with 69% of Canadian consumers using these medications for headaches[15] and 55% for migraines[16]—competition is coming in the form of functional products and cannabis-based treatments.

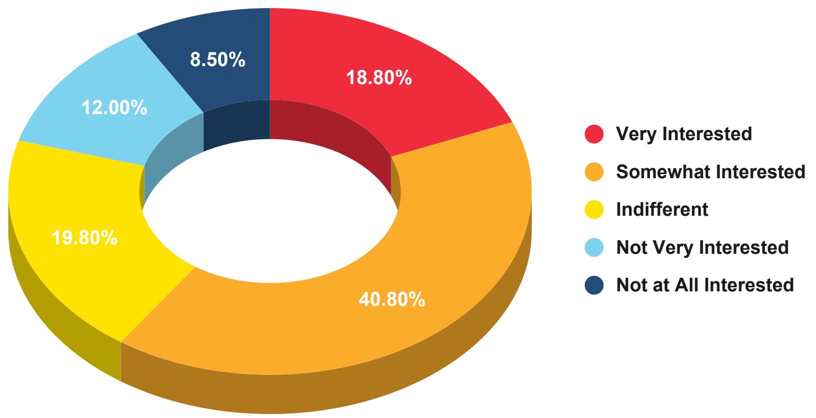
Treating Headaches	Treating Migraines
2X	**2.5X**
Likelihood of Gen Zers to use cannabis products to treat headaches	Likelihood of Gen Zers to use cannabis products to treat migraines



Compared to general population; Caddle Daily Survey Panel, data collected January 13, 2020 & February 7, 2020

Q: Rate your interest in consuming a drink that relieves headaches.

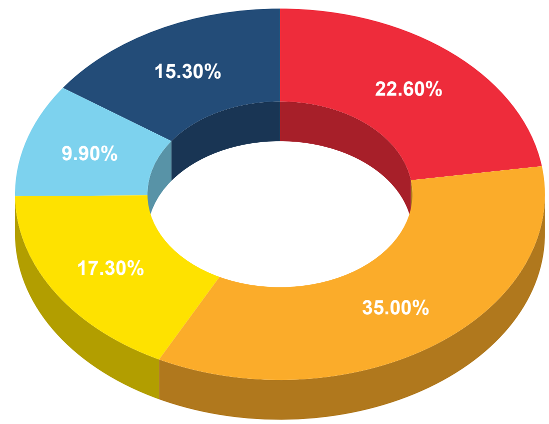
Date: January 13, 2020



*Filtered to those who identified themselves as headache sufferers
n = 6,651

Q: Rate your interest in consuming a drink that relieves migraines.

Date: February 7, 2020



*Filtered to those who identified themselves as migraine sufferers
n = 4,671

Specifically, 60% of headache sufferers from all generations are interested in a functional beverage that offers them headache relief,[17] while about 58% are interested in consuming a drink that relieves migraines.[18]

At the same time, Canadian Gen Zers—who experience headaches more frequently than other generations—are more than 2x as likely to use cannabis products to treat their headaches and 2.5x as likely to treat their migraines as the general population. They're also the age group that's most willing to pay a premium for such drinks—up to $6 to relieve headaches.[19]

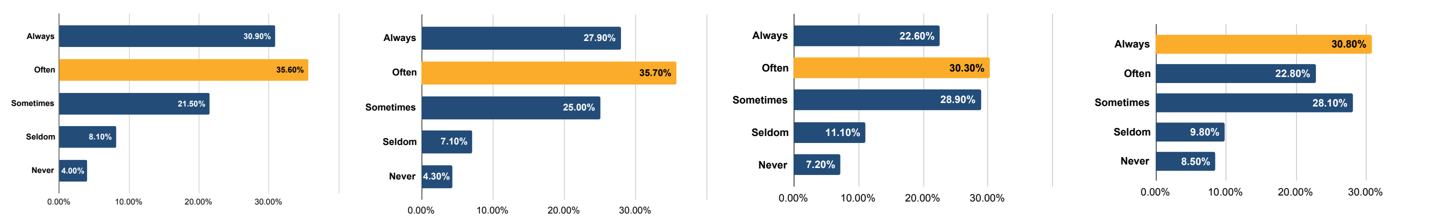
Chronic Pain

According to the federal government's Canadian Pain Task Force, 1 in 5 Canadians live with chronic pain. Living with unmanaged pain can lead to other chronic health conditions like sleeplessness, anxiety and depression.[20]

Chronic pain affects so many people around the world that the WHO recognized it as a disease in its own right—an important step, as it validates the experience of the millions of people worldwide who are living with the condition.

Q: How frequently do you struggle with chronic pain?

Date: January 22, 2020



Baby Boomers
n = 703

Gen X
n = 1,616

Millennials
n = 2,007

Gen Z
n = 224

Widespread evidence shows that the prevalence of chronic pain steadily increases with age. As such, it's not surprising to see Baby Boomers and Gen Xers over-indexing on this measure, with some 66.5% and 63.6% suffering "often" or "always" (compare this to 59% of the general population and about 53% each for Millennials and Gen Zers).[21]

Of these most frequent sufferers, almost half manage their pain using OTC medications, while a quarter use prescriptions. A further 13% prefer naturally derived treatments to manage chronic pain (including home remedies and cannabis by-products), while about 7% choose to "change their routine" to counteract their struggles.

Which generation of chronic pain sufferers is most likely to use cannabis to relieve their symptoms?

Gen Z, 12.5% of whom prefer this approach. In contrast, Baby Boomers are least likely; only 4% favour cannabis for reducing their chronic pain.

At the same time, a significant proportion of chronic sufferers are interested in consuming a functional beverage that relieves their pain, including 55% of Gen Xers and 52% of Baby Boomers—though once again, the lesser value reflects the hesitancy among Baby Boomers to seek out treatment that might be considered "alternative" to long-standing medical and pharmaceutical practice.

Though arthritis is often considered a disease that afflicts the older population, people of all ages can have the condition. In fact, over half of those with arthritis are under 65 years old.

Arthritis

Arthritis affects 1 in 5 Canadians, including as many as 24,000 children. This complex disease has over 100 different types, each of which contribute to a network of debilitating symptoms, most often including chronic pain due to joint swelling and stiffness.[22]

Though arthritis is typically thought of as a condition that affects older people—and indeed, the older you are, the more likely you'll be to suffer from some form of arthritis—people of all ages can have the condition. In fact, Arthritis Canada states that over half of people with arthritis are under age 65.

Thus, it's not surprising to find that more than 50% of Caddle's Daily Survey Panel respondents suffer from arthritis or know someone who does.[23] Among this group, Baby Boomers deal with arthritis pain most frequently, with more than half indicating they experience it "always" or "often."

When it comes to dealing with arthritis pain, we'd expect to see the same general pattern emerge as other chronic conditions. And in general, while OTC continues to predominate treatment options for the general population at 41% (and 49% for the Baby Boom generation), we do see a slightly lower level of reliance on prescription medication for arthritis than for other conditions (at 16% for the general population and 17% for Baby Boomers). At the same time, use of alternative remedies increases marginally, to 15% for the general population.

If older generations are especially likely to suffer from arthritis, does that mean that they'd break from their more traditional values around using "alternative" therapies, including consuming a drink to relieve their pain? Not significantly so; this group is just about as likely as the general population to be interested in arthritis pain-relieving beverages (at 47.6% and 46.4%, respectively).

Anxiety & Depression

Both anxiety and depression are elusive health conditions; though often considered to be mainly psychologically driven, anxiety and depression have genetic, physiological, environmental and social components that can predispose certain people to experience increased prevalence of the disorders. And, far from being just another variation of "the blues," these disorders can have real, long-lasting effects on sufferers' abilities to function normally in their daily lives.

According to the Canadian Medical Health Association,[24] anxiety disorders affect 5% of Canadian households, while approximately 8% of Canadian adults will experience major depression at some time in their lives.

Mental illness affects people of all ages, cultures, and education and income levels, though people aged 15–24 are more likely to experience mental illnesses and/or substance use disorders than any other age group, and women tend to have higher rates of mood and anxiety disorders than men.[25] (Note: this gender divide might relate more to the stigma that's often associated with mental health disorders, which can lead some people—particularly men—to hide their conditions).

While just under 70% of Caddle's Daily Active Panel general population suffer from anxiety or know someone who does,[26] younger generations seem to be suffering the most, with 80% of Gen Zers and 73% of Millennials most affected.

This fact, combined with their relative openness to trying alternative remedies for chronic health conditions, makes it understandable that Gen Zers and Millennials are significantly more likely than any other generation to consider trying an edible cannabis product to reduce anxiety (over-indexing at 24% and 16.9%, respectively vs. 13.5% for the general population).[27]

Mental & Physical Health are Linked

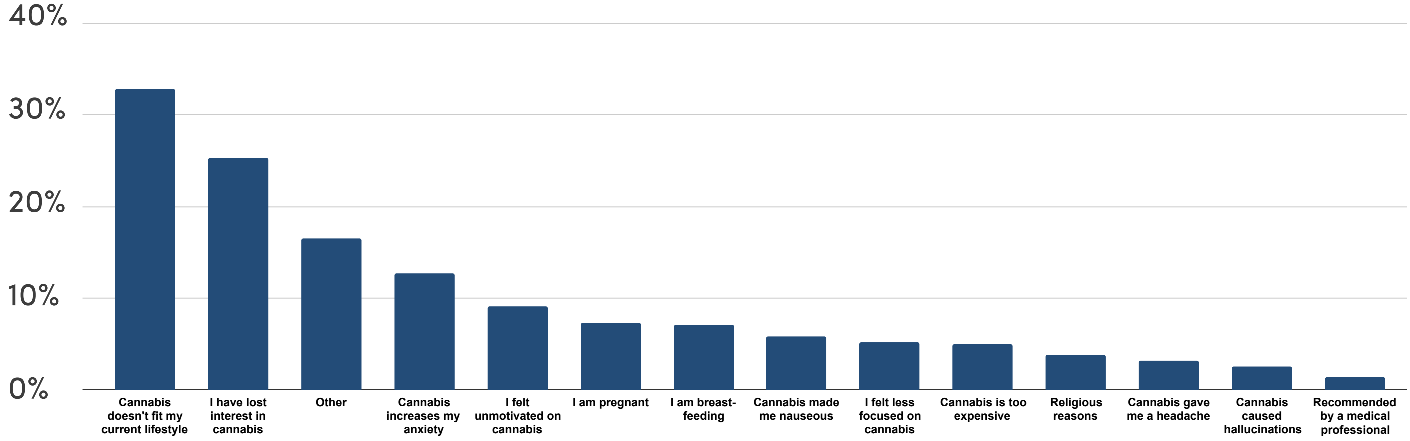
People with a long-term medical condition such as chronic pain are much more likely to also experience mood disorders. Conversely, people with a mood disorder are at much higher risk of developing a long-term medical condition.

Canadian Gen Zers Suffer From Anxiety the Most

They're also nearly 2x more likely than the general population to try an edible cannabis product to reduce their anxiety symptoms.

Q: Which of the following reasons describe why you haven't consumed cannabis in the past 12 months? (Select all)

Date: October 2-25, 2020



n = 13,572

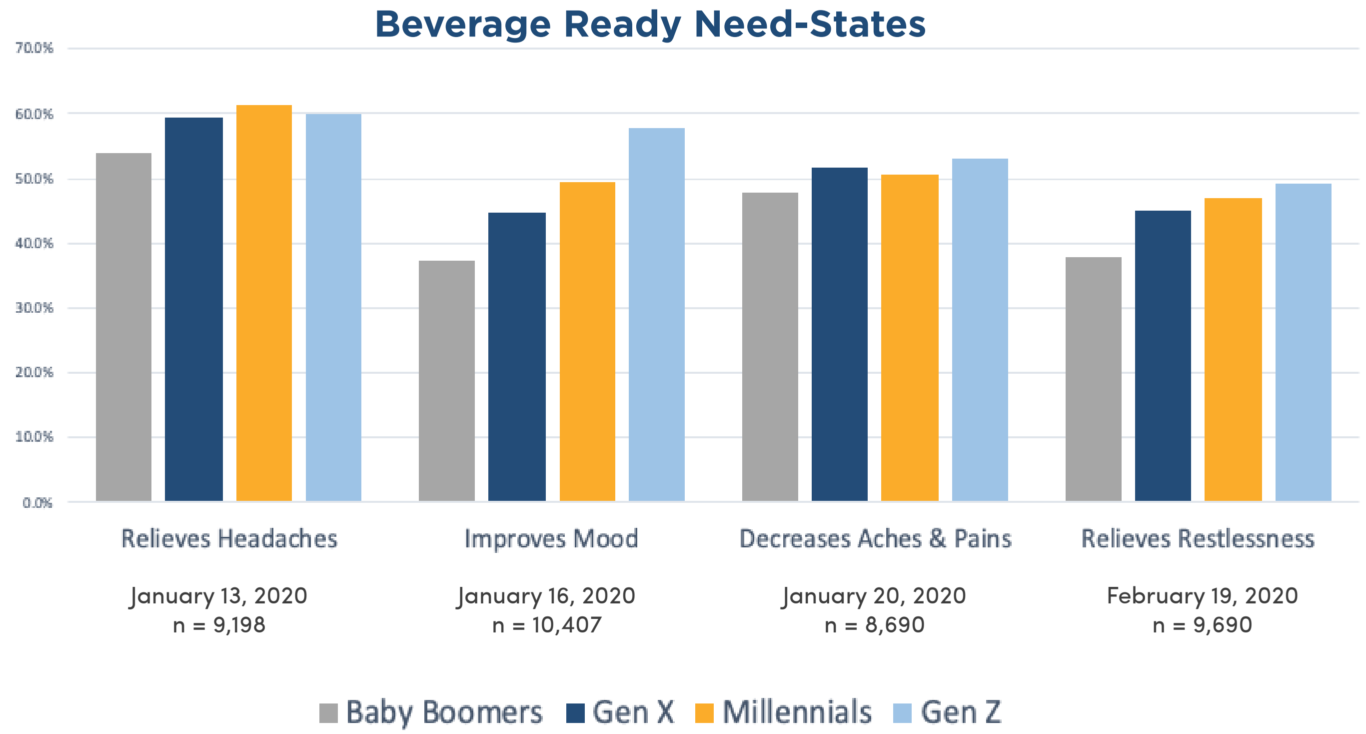
There's an interesting counterpoint to this trend, though: While cannabis has been known to have multiple health benefits, including relieving anxiety, stress and sleeplessness in some people, it can also have the opposite effect—making anxiety and depression worse. The problem might lie in the concentration of THC in the product. High levels of THC—the psychoactive compound found in cannabis—have been associated with both physical and mental side effects, including increased heart rate, difficulty sleeping, confusion, racing thoughts and yes, anxiety.

Results from our 18,000-person Cannabis Panel support this: While nearly a third of cannabis non-users associate the products with relaxing, almost half of those same respondents had stopped consuming cannabis in the last 12 months because it increased their anxiety. This includes more than 60% of Millennials and 88% of female-identifying respondents.[28]

So, while the verdict is still out on whether alternative treatments like cannabis and other functional products will surpass more traditional sources of relief like prescription or OTC medications, one thing is clear: Canadians are becoming increasingly aware and open to novel approaches, and the legalization of cannabis for both medical and recreational use has made possible new pathways for the treatment of their most chronic health concerns.

Infused Beverages—The Next Big Cannabis Retail Opportunity

As we've explored above, Canadians of all ages are struggling with a variety of physical and mental health concerns: Rates of anxiety and depression, head and body aches, and other health conditions are at an all-time high, and they're only expected to increase as people continue to struggle with restrictions brought about by the COVID-19 pandemic.



We believe that more Canadians are coming to terms with the fact that the frequency and severity of their health conditions is unsustainable over the long term and want to do something about it.

We see indications of this in our Daily Panel research, where over half of consumers have an interest in or do in fact consume functional products.[29] Gen Zers and Millennials over-index on their use of or interest in functional products, at 58% and 55% respectively, and list better sleep and reduced anxiety as the top two outcomes that would make them most likely to try such products.

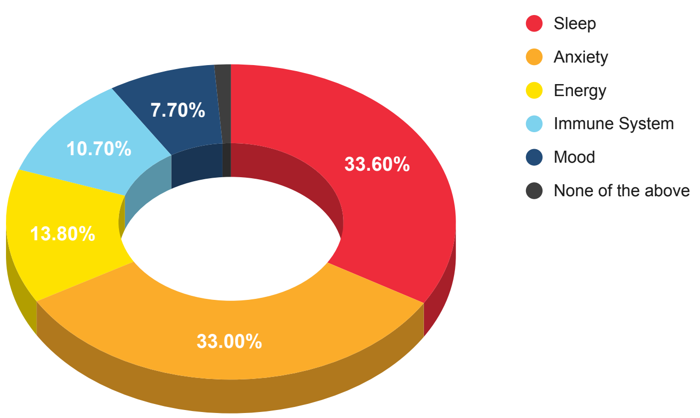
These younger sufferers also demonstrate a higher level of interest in cannabis-infused beverages (29% vs. the general population's 23.4%)[30] and are more likely than the general population to try an edible cannabis product to reduce their anxiety, get better sleep, and improve their mood or social experience.[31]

With the global functional beverages market reaching a value of nearly US$129 million in 2019 and expected to reach US$158 million in 2023,[32] it's more than likely that multi-billion-dollar manufacturers like PepsiCo and smaller players alike (e.g. Dream Water or any number of Canadian cannabis brands) will continue to enter the functional products' market.

Yet, our research suggests that there's still room for additional alternative products—and specifically, beverages—to address Canadians' specific health-driven need states as they evolve in the years ahead.

Q: Which of the following symptoms would you be most likely to take a functional product to address?

Date: November 23, 2020



Gen Z & Millennials
n = 2,473

The Case for Functional Beverages:
Sleep-Deprived Female Baby Boomers & Gen Zers

While more than a quarter of Caddle's general population label their average night's sleep as "poor" or "very poor," female Baby Boomers seem to suffer the most from sleep deprivation, with 1 in 3 reporting "poor" or "very poor" sleep quality.[33]

Meanwhile, 70% of female Baby Boomers & Gen Zers are interested in trying a beverage that improves sleep quality—a strong indication that the more traditional, medicine-based sleep aids on the market today aren't working hard enough to solve Canadians' sleep concerns.

Conclusion | Cannabis is Budding in Canada for Health, But More Education Required

From chronic medical conditions like headaches and migraines, arthritis and anxiety, to simply feeling better in one's skin when in social settings, Canadian consumers (particularly younger ones) are not only more open to the notion of using cannabis by-products, but they're also trying these products out more now than ever before.

And though legalization has helped to open more people's minds to the uses of cannabis beyond recreation, our research clearly indicates that Canada still has a long way to go in gaining more widespread adoption of cannabis as an option to treat some of the most common health ailments of everyday consumers.

Consider these 5 main insights and key takeaways as you look to take a bigger bite out of the Canadian cannabis retail market in 2021 and beyond:

01 Canadian consumers have a much larger need-scape than traditional pharmaceutical products are able to successfully address. With Canada's aging population, combined with the growing precedence of chronic medical conditions among younger populations, we anticipate that need states will continue to increase in relevance in the Canadian cannabis retail business.

Takeaway: The opportunity is ripe for growth-minded manufacturers and retailers to close the treatment gap in the coming months.

02 Canadian consumers have a way to go to seeing cannabis as the primary treatment option for their chronic health concerns. Just because consumers are using cannabis by-products to treat diverse need states—including to reduce their anxiety, get better sleep, and improve their mood or social experience—they're still more likely to be recreational vs. medicinal users.

Takeaway: Awareness-building is key to shifting consumers' mindsets around the potential use cases and benefits of cannabis for therapeutic treatments that go beyond epilepsy, multiple sclerosis and other major medical issues.

03 Mental health treatment requires a holistic approach and the cannabis retail experience should offer that same service to consumers. Getting the chemistry right in mental health is critical, and our research indicates that many consumers use a combination of recreational cannabis and OTC or prescription medications to treat anxiety, depression and other mental health concerns.

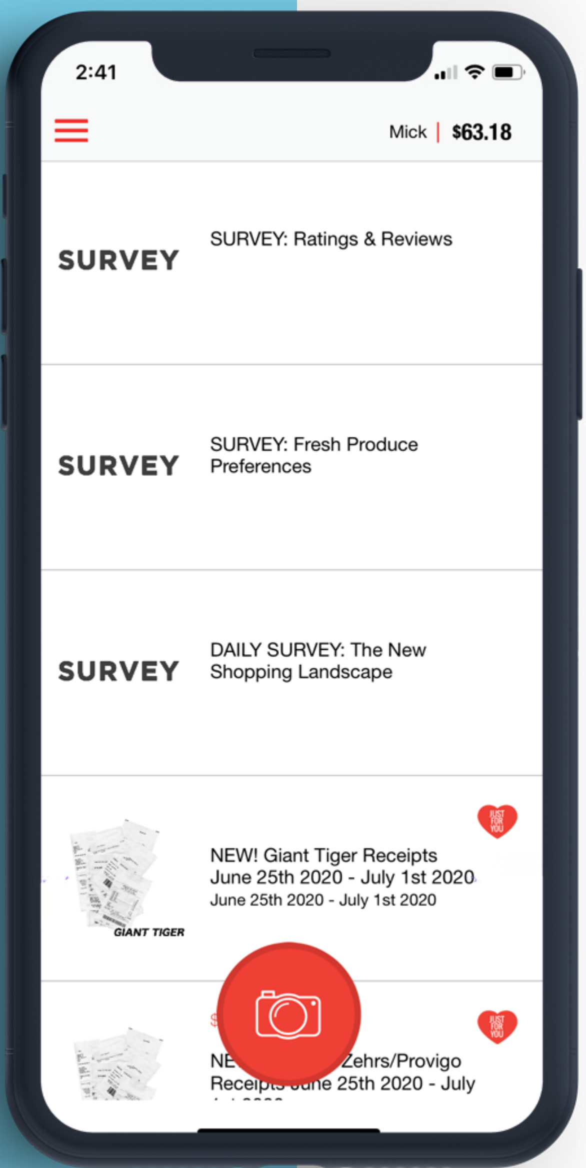
Takeaway: Governments should consider relaxing cannabis retail laws, which prohibit bud tenders from offering advice to customers, in order to further stem the tide of chronic mental health issues among Canadian consumers.

04 Cannabis may well be a healthier option than traditional recreational vices like alcohol (or at least, consumers are willing to consider it). Almost 1 of every 5 cannabis non-users believes cannabis is healthier than consuming alcohol, while a further 48% of consumers believe cannabis has the same impact on health as drinking alcoholic beverages.

Takeaway: The booming cannabis-infused drinks category is prime to grow in new and interesting ways, provided they can meet consumer needs in their favourite social settings.

05 Cannabis normalization is coming.

Takeaway: Industry stakeholders should prepare for a not-too-distant future where cannabis is treated like sugar or corn—just another somewhat-controversial additive that can be bought widely in retail channels, in all sorts of formats and delivery systems.



About Caddle Inc.

Launched in 2015 by former consumer packaged goods (CPG) executive and Canadian Grocer 2016 Generation Next award winner Ransom Hawley, Caddle® is the largest daily and monthly active panel in the Canadian marketplace. Our mobile-first insights platform rewards Canadians for sharing data and engaging with brands.

Designed to help brands make better decisions, faster, Caddle has grown into Canada's largest daily active consumer research panel of 10,000+, 6-figure monthly active panel, and growing every day.

Macro and niche data verticals include:

- New Moms
- Costco Shoppers
- Amazon Prime Members
- Cannabis Consumers
- Health Professionals
- Luxury Shoppers
- Shopper Dads
- Repeat Purchasers
- Vegan Buyers
- Smokers/Non-Smokers

Now working with almost every major CPG company and making inroads with Canada's largest grocery retailers, Caddle provides access to rapid insights at every stage of the consumer journey across every type of shopper, country-wide.

Learn more at [www.getcaddle.com.](http://www.getcaddle.com)

Contact us today.
insights@caddle.ca
getcaddle.com

Endnotes

1. n = 5,330
2. Data collected 08/31–10/01/2020, n = 18,902
3. Data collected 10/02–10/25/2020, n = 18,902
4. n = 5,330
5. Caddle Canadian Cannabis Panel, data collected 10/02-10/25/2020, n = 18,902
6. Caddle Canadian Cannabis Panel, data collected 10/02-10/25/2020, n = 13,572
7. For more information on the clinical applications of cannabis and cannabinoids, see https://www.canada.ca/en/health-canada/services/drugs-medication/cannabis/information-medical-practitioners/information-health-care-professionals-cannabis-cannabinoids.html#a4.0 f
8. Data collected 10/02–10/25/2020, n = 13,572
9. Data collected 01/13/2020, n = 9,198
10. According to Migraine Canada statistics, cited in "Canada's migraine problem: An expert perspective," Toronto Star, Mar. 13, 2020
11. World Health Organization, "Headache Disorders," Apr. 8, 2016
12. Data collected 01/13/2020, n = 422
13. Data collected 02/07/2020, n = 4,671
14. See https://headachesociety.ca/wp-content/uploads/2017/10/TOP_headache_lecture.pdf for more details
15. Data collected 01/13/2020, n = 6,651
16. Data collected 02/07/2020, n = 4,671
17. Data collected 01/13/2020, n = 6,651
18. Data collected 02/07/2020, n = 4,671
19. Data collected 01/13/2020, n = 6,651
20. Government of Canada, Canadian Pain Task Force Report, "Chronic Pain in Canada: Laying a Foundation for Action," Jun. 2019
21. Data collected 01/22/2020, chronic pain sufferers n = 4,577
22. According to Arthritis Canada, "The Truth about Arthritis," no date
23. Data collected 02/05/2020, n = 8,893
24. Canadian Mental Health Association, "Fast Facts about Mental Illness," no date
25. Centre for Addiction and Mental Health, "Mental Illness and Addiction: Facts and Statistics," no date
26. Data collected 01/16/2020, n = 10,407
27. Data collected 01/18/2020, Gen Z (n = 385), Millennials (n = 4,135)
28. Data collected 10/02–10/25/2020, n = 13,572
29. Data collected 11/23/2020, n = 8,907
30. Data collected 11/18/2020, Gen Z and Millennials (n = 3,421)
31. Data collected 01/18/2020, Gen Z and Millennials (n = 4,520)
32. According to The Business Research Company's report, "Functional Beverages Market – Global Forecast to 2023," Nov. 2020
33. Data collected 10/08/2020, n = 8,496

*Disclaimer: all data presented is owned by Caddle and has a Margin of Error of 1% or lower.

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