

Emerald User Research

Background

June 2018:

- DDB ran a first round of user research with a “Friends & Family” recruit.
- This helped us identify content opportunities for the newly launched site, including:
 - Educating potential customers about the endocannabinoid system & strain types
 - Offering more support for potential customers to register
 - Telling the Emerald story

September 2018:

- Because we did a “Friends & Family” recruit, we were only able to speak to recreational users & self-treaters.
- We decided to do another round of research with a formal recruit so we could talk to individuals with a prescription who were registered with a licensed producer.

Approach for medical user research

Methodology:

- 11 one-on-one moderated interviews

Participant criteria:

- 5 men, 6 women
- 5 from Ontario, 4 from British Columbia, 2 from Quebec
- Has a prescription for medical cannabis
- Registered with at least one licensed producer (vetted from the Health Canada list)
- Purchased medical cannabis at least 3 times in the last year
- Consumed medical cannabis regularly for at least 3 months

Objectives for medical user research

1. **Understand why people make the shift** from treating illness/pain with traditional pharmaceutical medication to medical cannabis.
2. **Learn where people obtained a prescription**, and understand any difficulties they experienced with their doctor.
3. **Understand how people choose an LP**, and where the recommendation came from (doctor, social network, etc.)
4. **Understand how people decide what products to order**, and their experiences shopping online and getting deliveries.
5. **Reveal consumption habits**, including time of day, dosing and catering strain/product to symptom.
6. **Discover attitudes to upcoming legalization** in Canada.

User research outputs

Personas:

- **To get inside the personas' minds**, so you can better understand their unique motivations, behaviours, patterns & attitudes.
- **To influence the design of a useful and usable digital experience for each persona**, meeting their needs with more impact and supporting their goals and behaviour patterns.

Journey maps:

- **Developing journey maps for each persona**, layering on what the user is doing, thinking and feeling in each stage of the journey.
- **Identify opportunities to engage and improve the user experience** across all of Emerald's touchpoint & channels.

Personas

Meet the personas

RON The Self-Treater



“ I like smoking for fun with my friends and to wind down at the end of a workday, but I also use cannabis to manage my back pain and get a good night’s sleep. ”

AGE: 39
MARITAL STATUS: SINGLE
LOCATION: TORONTO, ON
INCOME: \$66,000
OCCUPATION: PROJECT COORDINATOR
ILLNESS: CHRONIC BACK PAIN

SOFIA The Medical User



“ I always thought of marijuana as a street drug and never pursued it recreationally. Getting a prescription from my doctor made it less taboo. For me, cannabis is medicine. ”

AGE: 43
MARITAL STATUS: MARRIED, 2 KIDS
LOCATION: VANCOUVER, BC
INCOME: \$45,000
OCCUPATION: THERAPIST (PART-TIME)
ILLNESS: RHEUMATOID ARTHRITIS

CHRIS The Recreational User



“ I smoke because it makes a fun night even more fun for me. After buying from a dealer for so many years, I love that I can walk into a dispensary and talk to the staff! They have so many strains and it’s convenient. ”

AGE: 42
MARITAL STATUS: LIVES WITH PARTNER
LOCATION: EDMONTON, AB
INCOME: \$85,000
OCCUPATION: ENGINEER
ILLNESS: NONE

SOFIA The Medical User



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AGE: **43**

MARITAL STATUS: **MARRIED, 2 KIDS**

LOCATION: **VANCOUVER, BC**

INCOME: **\$45,000**

OCCUPATION: **THERAPIST (PART-TIME)**

ILLNESS: **RHEUMATOID ARTHRITIS**

GETTING TO KNOW HER

- 2 years ago, Sofia began to experience significant pain in her wrists and hands and was eventually diagnosed with rheumatoid arthritis. She is now suffering from depression as well.
- Her doctor prescribed an immunosuppressant, but Sofia still has joint pain and trouble sleeping. She became interested in medical cannabis, and through online research discovered that CBD strains can help with pain without getting you high.
- After working up the nerve, Sofia went back to her rheumatologist to ask for a prescription for medical cannabis. He didn't feel comfortable prescribing but referred her to a cannabis clinic, where she got a prescription and registered with a licensed producer.
- Although it took experimentation to figure out the best strains and dosage to manage her condition, Sofia is happy she got a prescription. Cannabis helps her focus at work, and gives her energy to be with her family.

WHAT SHE WANTS

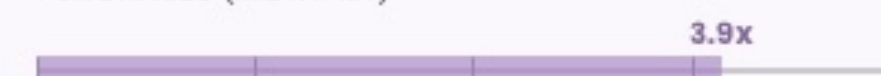
- To live, as much as she can, a pain-free life where she has more stamina at work and in her social life.
- To manage the symptoms of her her arthritis with as few side effects from medication as possible.
- To not feel stigmatized or like a pothead for consuming medical cannabis.
- To feel more comfortable sharing with her social circle that she consumes medical cannabis.

HOW TO ENGAGE WITH HER*

- Educate her on the CBD strains of medical cannabis, as she's worried about getting high.
- Make it easier for her to get a prescription from her doctor.
- Recommend products and dosage guidelines that would help her manage the symptoms of her arthritis.
- Ensure that her go-to cannabis products are always in stock.

PURCHASING BEHAVIOUR

PURCHASES (MONTHLY)*



SPENDS (MONTHLY)*



BUYS CANNABIS FROM:*

LICENSED PRODUCER
PRIVATE DISPENSARIES

LIKES TO BUY:*

FLOWERS/BUD
OIL
EDIBLES

CONSUMPTION PROFILE

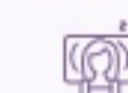
CONSUMES (MONTHLY)*



FAVOURITE WAYS TO CONSUME:*

SMOKING A JOINT
EATING EDIBLES
TAKING OILS ORALLY

HOW CANNABIS HELPS*



1 To sleep



2 Alleviating pain



3 Reduce stress/anxiety



4 To relax

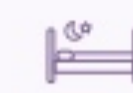


5 Mental Calmness

CONSUMES CANNABIS*



1 Experiencing symptoms due to illness



2 Before going to bed/taking a nap



3 Chilling at home



4 As part of regular health/wellness routine



5 To manage side effects of treatments for medical conditions

BRAND RELATIONSHIPS

LEARNS ABOUT BRANDS FROM*



Doctor



Friends and family



Social media

IDEAL CANNABIS BRAND*



Good value



Locally produced/
Canadian



Consistent
experience/dose



Contains healthy
Ingredients



Empowers me to take
control of my health

RON The Self-Treater



“ I like smoking for fun with my friends and to wind down at the end of a workday, but I also use cannabis to manage my back pain and get a good night's sleep. ”

AGE: **39**

INCOME: **\$66,000**

MARITAL STATUS: **SINGLE**

OCCUPATION: **PROJECT COORDINATOR**

LOCATION: **TORONTO, ON**

ILLNESS: **CHRONIC BACK PAIN**

GETTING TO KNOW HIM

- Started smoking joints for fun with friends when he was in high school and has continued to smoke through his 20s and 30s, both socially and to relax in the evening.
- Typically shops at a dispensary in his neighbourhood or from a dealer he met through a friend.
- 6 months ago, he threw his back out shoveling the driveway after a bad snowstorm. He now suffers from chronic back pain. His doctor prescribed T3s for the pain, but Ron is concerned about the side effects and the risk of addiction.
- Familiar with the benefits of CBD for pain because of his recreational use. Became interested in a prescription for cannabis after his injury, but was unable to get one from his doctor.
- Finds it difficult to get CBD-only strains at the dispensary, and is struggling to figure out dosing on his own.

WHAT HE WANTS

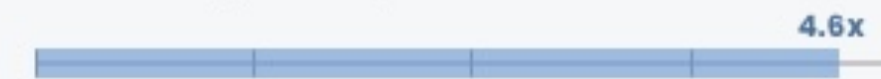
- The ability to legally purchase cannabis from an LP for medical and recreational consumption.
- Recreational cannabis to be legalized, so he doesn't feel guilty for doing something illegal.
- To manage his chronic back pain so he has more stamina at work and in his social life.

HOW TO ENGAGE WITH HIM*

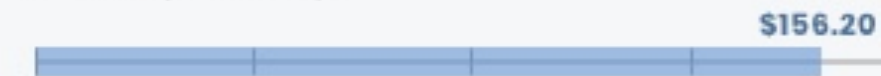
- Make it easier for him to get a prescription from his doctor.
- Recommend products and dosage guidelines for both medicinal use (to manage back pain) and recreational use (hanging out with friends).
- Keep him informed on the latest cannabis products and accessories.

PURCHASING BEHAVIOUR

PURCHASES (MONTHLY)*



SPENDS (MONTHLY)*



BUYS CANNABIS FROM:*

FRIENDS
PRIVATE DEALERS
PRIVATE DISPENSARIES

LIKES TO BUY:*

FLOWERS/BUD
EDIBLES

CONSUMPTION PROFILE

CONSUMES (MONTHLY)*



FAVOURITE WAYS TO CONSUME:*

SMOKING A JOINT
SMOKING USING A BONG/PIPE
EATING EDIBLES

HOW CANNABIS HELPS*

- 1 Reduce stress/anxiety
- 2 To relax
- 3 To sleep
- 4 Mental Calmness
- 5 Alleviating pain

CONSUMES CANNABIS*

- 1 Chilling at home
- 2 Before going to bed/taking a nap
- 3 Experiencing symptoms due to illness
- 4 Social gatherings at home
- 5 Music festivals and concerts

BRAND RELATIONSHIPS

LEARNS ABOUT BRANDS FROM*

- 1 Friends and family
- 2 Social media
- 3 News articles or blog

IDEAL CANNABIS BRAND*

- 1 Good value
- 2 Locally produced/Canadian
- 3 Variety of strains
- 4 Consistent experience/dose
- 5 Stays fresh after opening

CHRIS The Recreational User



“ I smoke because it makes a fun night even more fun for me. After buying from a dealer for so many years, I love that I can walk into a dispensary and talk to the staff! They have so many strains and it's convenient. ”

AGE: **42**

INCOME: **\$85,000**

MARITAL STATUS: **LIVES WITH PARTNER**

OCCUPATION: **ENGINEER**

LOCATION: **EDMONTON, AB**

ILLNESS: **NONE**

GETTING TO KNOW HIM

- Chris started smoking joints daily for fun with friends when he was in high school. As a teenager, he got his cannabis through friends of friends. He didn't have much choice in the type of products he got, but he also didn't care.
- As he moved into his 20s and finished university, he continued to smoke for fun at parties and concerts, but less frequently (3 or 4 times a week). He bought his cannabis from a dealer, but began getting frustrated with the limited selection as he learned more about how different strain types produce different highs..
- A year ago, a friend recommended a local dispensary to him, and he now shops there a couple of times a month. He chooses strains for fun & energy (like hanging out socially) and to unwind/relax in the evening after work.
- He enjoys shopping in a physical store with a great selection after so many years of deliveries from dealers, and loves getting product recommendations from the dispensary's budtenders.

WHAT HE WANTS

- Recreational cannabis to be legalized, so he doesn't feel guilty for doing something illegal.
- A more reliable source to purchase cannabis, as he's concerned his favourite dispensary will get raided.
- The ability to legally buy online, without concern about sharing personal information.

HOW TO ENGAGE WITH HIM*

- Offer a number of strains and a wide selection of products besides dried flower (edibles, beverages, etc.)
- Keep him informed on the latest cannabis products and accessories.

PURCHASING BEHAVIOUR

PURCHASES (MONTHLY)*



SPENDS (MONTHLY)*



BUYS CANNABIS FROM:*

FRIENDS
PRIVATE DEALERS
PRIVATE DISPENSARIES

LIKES TO BUY:*

FLOWERS/BUD
EDIBLES
PREROLL

CONSUMPTION PROFILE

CONSUMES (MONTHLY)*



FAVOURITE WAYS TO CONSUME:*

SMOKING A JOINT
SMOKING USING A BONG/PIPE
EATING EDIBLES

HOW CANNABIS HELPS*

- 1 To relax
- 2 Reduce stress/anxiety
- 3 To feel good
- 4 Having fun with friends/family
- 5 To sleep

CONSUMES CANNABIS*

- 1 Chilling at home
- 2 Social gatherings at home
- 3 Before going to bed/taking a nap
- 4 Social gatherings in public
- 5 Music festivals and concerts

BRAND RELATIONSHIPS

LEARNS ABOUT BRANDS FROM*

- Friends and family
- Social media
- News articles or blog

IDEAL CANNABIS BRAND*

- Good value
- Locally produced/Canadian
- Variety of formats
- Variety of strains
- Stays fresh after opening

Journeys

RON

The Self-Treater



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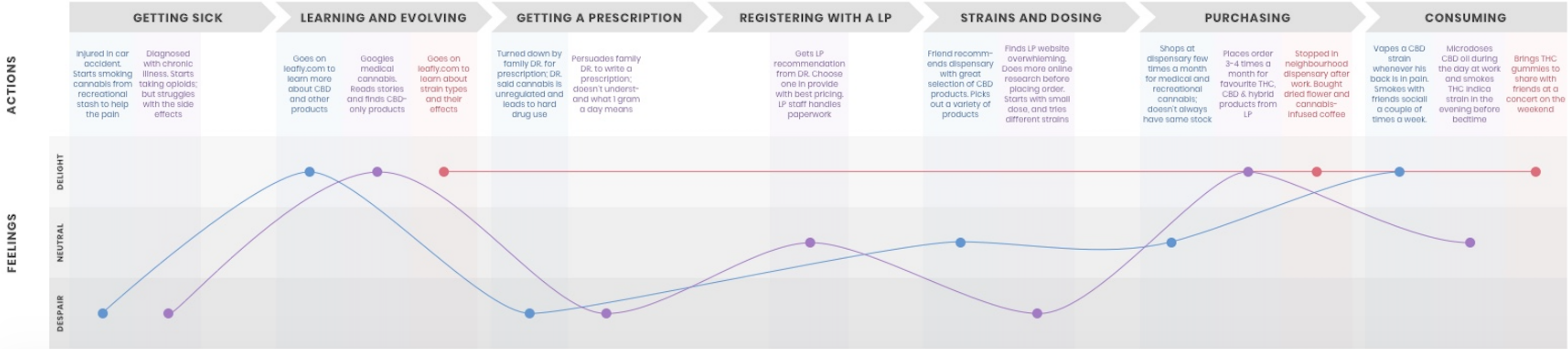
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ILLNESS: NONE

CONSOLIDATED USER JOURNEY



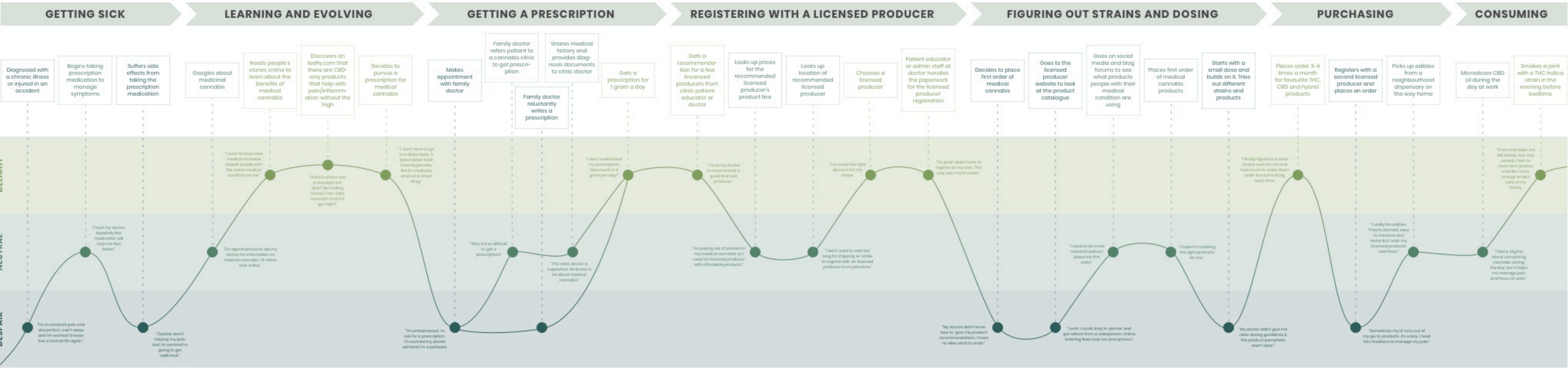
EMERALD:
THE MEDICINAL USER JOURNEY



SOFIA
The Medicinal User

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Stage 1:

Getting Sick

Participants take medical cannabis for physical & mental health conditions

Individuals who went through a traumatic health event suffer from mental health issues as a result of their diagnosis/accident.

Medical conditions fell into 3 categories and often overlapped:

- **Chronic illnesses:** Multiple Sclerosis, Rheumatoid Arthritis, Crohn's Disease, Diabetes, Endometriosis, migraines & back pain
- **Sudden life events:** Strokes and car/bus accidents
- **Mental health conditions:** Insomnia, anxiety & depression

Some participants take both traditional pharmaceutical medication & medical cannabis

Examples we heard:

- **Biologic immunosuppressants:** To manage symptoms of autoimmune diseases like rheumatoid arthritis & Crohn's disease
- **Insulin:** To manage Type 1 diabetes
- **Anti-spasmodics:** To manage muscle spasms & tremors resulting from Multiple Sclerosis & a stroke
- **SSRIs (Wellbutrin, Paxil):** To help with depression

Why medical cannabis?

- The majority of participants were prescribed **opioids and/or benzodiazepenes** (such as Valium & Ativan) at the time of their diagnosis or accident.
- These medications caused **strong side effects** (grogginess, upset stomach & dependency issues) and ultimately didn't help with pain, anxiety and insomnia.
- Medical cannabis was perceived as a **more natural and less harmful alternative** to these medications.



Why obtain a prescription?

- **Cannabis use was stigmatized** for the majority of participants, with associations to recreational drug use.

“I always thought of marijuana as a street drug. I never pursued it recreationally. I don’t want to be associated with potheads, with being a stoner.”

- A medical prescription helped participants perceive **cannabis as a prescription medication** vs. a recreational drug.

“It legitimized it for me. There’s less taboo that comes from getting it from your doctor.”



How did earlier recreational use influence attitudes towards medical cannabis?

All participants tried out cannabis for fun in high school. The decision to continue depended on their high school experience.

Self-medicating with cannabis into adulthood:

- 4 participants continued to self-medicate with cannabis in their 20s & 30s, shopping with dealers or dispensaries until the LPs opened.

Stopping after high school:

- 7 participants didn't like their high school experience, stating they felt too high & impaired and did not continue to consume.
- The belief that cannabis has strong side effects was a barrier to pursuing medical cannabis once they got sick.

Stage 2:

Learning & Evolving

What did participants want answers to?

- What are the benefits & side effects of medical cannabis?
- How did medical cannabis help others with the same medical condition as me?
- Can I take medical cannabis and not get high/impaired/paranoid?
- How addictive or habit-forming is cannabis? Will it lead to harder drug-use?

STRAINS & PRODUCTS

Which Cannabis Strains Are High in CBD?

BAILEY RAHN
August 5, 2015



Learning about CBD

- Participants started researching on Google, and ended up on **sites like leafly.com** because it featured high in the search results.
- The most significant takeaway was learning about CBD products that could help with pain without the associated high.

“I didn’t know the difference at first. Now I know that THC gets you more high, CBD is more to relax and not get you high, no altered state.”

Learning from other's experiences

- Participants were very interested in **learning from people who had the same medical condition as them**, and how they used medical cannabis to treat their symptoms.
 - Some participants belonged to a Facebook group for their condition.
 - Others spoke to friends in their social network with the same condition.

"I read people's stories about how it helped them with chronic pain, helped them sleep. It wasn't so much the literature, I wanted to know people's experiences."



Stage 3:

Getting a Prescription

Where did participants get their prescriptions?

Cannabis Clinic

5 participants

Family Doctor

5 participants

NP from Tweed

1 participant

Getting a prescription was difficult and embarrassing

- **Cannabis clinics were the second choice:** All 5 participants went to a cannabis clinic after their doctor or specialist turned them down for a prescription. Why?
 - 2 participants said their doctor supported medical cannabis use, but referred them to a cannabis clinic because **they didn't feel knowledgeable enough to prescribe.**
 - 3 participants stated their **doctors were old-fashioned and unwilling to prescribe**, stating that cannabis was a habit-forming recreational drug. These participants found the clinics through their own research.
 - *"He said, 'You don't need that and he tried to persuade me not to take it.'"*
- **Doctors needed convincing:** The other 5 participants had to persuade their doctor and explicitly ask for a prescription. No one had a doctor who suggested that their patient take medical cannabis.

Stage 4:

Registering with an LP

All participants went with an LP recommended by their doctor or a clinic patient educator

- **Patient educators:**
 - Broke down pricing and fulfillment times when recommending an LP
 - More likely to recommend 2 or 3 LPs and let the patient decide
- **Doctors:**
 - Had a pre-existing relationship with a single LP, who they endorsed

Top patient considerations for choosing an LP

1. Price & Affordability

- The majority of participants **paid out of pocket** for their medical cannabis.
- *“Chances are if you’re a medical marijuana client, we’re not the wealthiest people financially. We’re in a situation that has cost us in our careers.”*

2. Fast Shipping Times


- Participants wanted to **“shop local”** when it came to an LP.
- All participants chose **an LP in their province**, on the assumption that shipping times would be faster.

3. Diverse Product Line


- Participants wanted a diverse line of products, with many **different strain types** to choose from.
- This was especially important at this stage, since participants didn’t know yet what products would work best for their symptoms.


Registering with multiple LPs

- 50% of participants **registered with a second or third licensed producer** 6 months after their first registration.
- Why? Their **preferred LP continually ran out of stock** of their go-to product, which caused a lot of anxiety around not having medication to manage symptoms of their illness.



ETA NOV





\$8⁵⁰ /gram

Blue

Blue • Flower • Hybrid

THC 8-11 %

CBD 8-11 %

\$42⁵⁰ - \$122⁵⁰ /jar

Stage 5:

Figuring Out Strains & Dosing

The first few orders were a frustrating experiment, because participants received little guidance from clinics or doctors on what to order.

“It was difficult because I didn’t know the products. So I said, I’ll try something and see.”

How did participants decide what to order?

The product catalogues on the LP websites did not help participants figure out what to purchase.

Because the LP websites and clinics/doctors didn't provide clear recommendations on what to purchase, participants went back online to do more research.

- **Social media & forums:** Participants looked up specific product recommendations from individuals with the same medical condition.
- **Previous online research:** Participants conducted more in-depth research, learning more about CBD & THC and the physiological effects of Indica, Sativa & Hybrid strains.
- **Calling their LP:** 2 participants called customer service at their LP to get product recommendations.

Figuring out dosing was an experiment. Most participants were prescribed 1 or 2 grams per day, but had difficulty translating dosage to actual usage.

“I just guessed. I usually don’t finish a joint. I just kind of experimented.”

All participants started with a low dose at the beginning, and then increased with each use

- **A lack of guidance:**
 - Participants were frustrated that their doctor didn't provide clear dosing information.
 - Some participants tried to follow the dosing recommendations from LP-provided booklets, but still ended up experimenting.
- **Oils vs. dried flower:**
 - Participants found it slightly easier to dose with oils because of the syringe with mL measurements. Rolling a joint was more open to interpretation.
"Start low and go up. It's hit and miss, isn't it?"
- **Other factors:**
 - Participants also experimented with strain types, THC/CBD percentages and time of day before identifying the right products and when to take them.

Stage 6:

Regular Purchasing

Through experimentation & consumption, participants figured out which products worked for their symptoms and repeatedly ordered them.

“Once I’ve found something that works, I’m inclined to stick with it. I’m very much a creature of habit.”

Preference for dried flower over oils

- Most participants preferred to purchase dried flower, citing:
 - Consuming dried flower was immediately effective, while an oil can take up to an hour.
 - The price of oils was prohibitive, especially for participants on disability.
 - Only 3 participants mentioned purchasing cannabis oils.



Dispensary purchases

- 50% of participants shop at both their LP & a dispensary, citing:

- Faster & easier to pop into a local dispensary vs. waiting for the LP to ship.

“I’ve bought off-prescription. With the prescription, you have to wait for it. Sometimes I want to get it quicker.”

- Access to different products, especially edibles, as they’re easy to measure, discreet to consume and tasty!
- **50% of participants only shopped at their LP**, as they distrusted the quality and source of dispensary products.



Preference to purchase in-store over online

- 75% participants would prefer to shop at their LP in a bricks & mortar store, citing:
 - To get advice on products and dosing.
 - To see and smell the products in person.
 - To buy cannabis in a more spur-of-the-moment way vs. waiting for shipping.

“Tilray doesn’t know me. There’s no substitute for relationships with people.”
- 25% participants preferred to buy online, citing:
 - Convenience of door-to-door shipping.
 - Privacy & anonymity of ordering online.



Stage 7:

Regular Consuming

Most participants consumed cannabis daily or 3-5 times a week on an as-needed basis.

“It all depends. If I’m really hurting, sometimes in the morning. But mostly in the evening.”

Participants thoughtfully consume different strains at different times to manage symptoms.

THC STRAINS

THC 18.30%, CBD 0.00%

To help with sleep at nighttime.



CBD STRAINS

THC 1.5%, CBD 20.0%

To help with pain & anxiety during the day.



HYBRID STRAINS

THC 8.38%, CBD 8.67%

To manage symptoms overall, at any time of day.





50% of participants consumed CBD during the day & THC in the evening.

- CBD helped participants **manage acute pain events** on an as-needed basis during the day.
 - Some participants microdosed CBD oil at work or ate an edible because it was more discreet, while others went out for a walk or to their car to vape or smoke.
- THC helped participants **fall asleep more easily** and stay asleep through the night.



50% of participants only consumed THC during the evening/nighttime.

- These participants did not take CBD products at all, citing that CBD made them **too slow/relaxed at work & didn't manage pain** symptoms as well as THC products.
- Participants who vaped or smoked were concerned about consuming during the day. ***"I don't want to go into a client's house stinking like weed."***
- These participants **preferred to smoke THC strains in the privacy of their home**, at bedtime after the kids were put to bed.

Sharing medical cannabis use with social circle

- Many participants **did not want to disclose their medical condition**, so didn't feel comfortable disclosing their medical cannabis use either.
- Participants felt **a strong stigma for consuming cannabis**, even when it was for medical reasons and helping their quality of life.
- Most participants were **private about their consumption**, only disclosing to close friends and family (and never work).

"It's like outing myself, I don't want to out myself."

"I still struggle with this. I go to the gym, I buy groceries, I do chores. Am I such a monster pothead, or do I avail myself of something that helps me get through the day easier?"

How does cannabis help?

- **Primarily with managing physical pain**, including muscle pain, nerve pain, muscle spasms, cramps, nausea & joint pain
- **Getting physical symptoms under control had a positive domino effect.** Participants cited:
 - Better focus at work
 - Winding down and relaxing in the evening
 - Falling asleep more easily & staying asleep through the night
 - More energy to take care of their kids & family
 - Less anxiety & depression

“I feel like my arthritis is so much less serious because I’m able to get full sleeps.”

“I feel a little boost, like I can handle this. More stamina to get through what I’m doing. It doesn’t remove all the pain. It helps me focus on something other than the pain.”

Attitudes to Legalization

Participants were overall in favor of legalization, but with some concerns

POSITIVES

- Reduce stigma surrounding cannabis consumption
- Generate tax revenue for government projects
- Take the weight off the judicial system
- More regulated, safer & higher quality products than what's currently available illegally

CONCERNS

- Worried that people will drive high and smoke on the street
- Concerned about teens and young adults smoking while their brains are still developing
- Worried about supply - LPs will focus on recreational users over medical customer base
- Legalization will drive up the price of medical cannabis

Value of the prescription post-legalization

- **2/3 of participants planned to keep their prescription post-legalization:**
 - Continuing to identify as a medical user was important, to fight the stigma of being perceived as a stoner or pothead.
 - These participants believed the quality of the medical cannabis would be superior to recreational cannabis, even if it was all produced by the same LP.
- **1/3 of participants were unsure if they would keep their prescription:**
 - They were excited over more choices and options to purchase cannabis.
 - *“If it’s legal, I won’t have to get a prescription for it. It’ll save time, I won’t have to go to my doctor.”*