



Medical Marijuana Patient Survey Results

January 2016

Table of Contents

Executive Summary	4
Key Findings	5
Methodology.....	6
Demographics.....	8
Medical Reasons for Cannabis Use	9
Use Preferences.....	11
Purchase Preferences.....	14
Social Perceptions of Marijuana Use	17
Conclusions.....	19
Appendix A: Comments from Participants	21

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I find that a combination of morning meditation, exercise, and evening cannabis use helps ease my anxiety dramatically throughout the week, and I prefer the results to that of prescription meds. Also, I am a cancer survivor and had used cannabis throughout my treatment to help ease nausea, trouble sleeping, and general pain. I highly recommend marijuana as a safe treatment for many conditions to many people close to me. ”

— Survey respondent

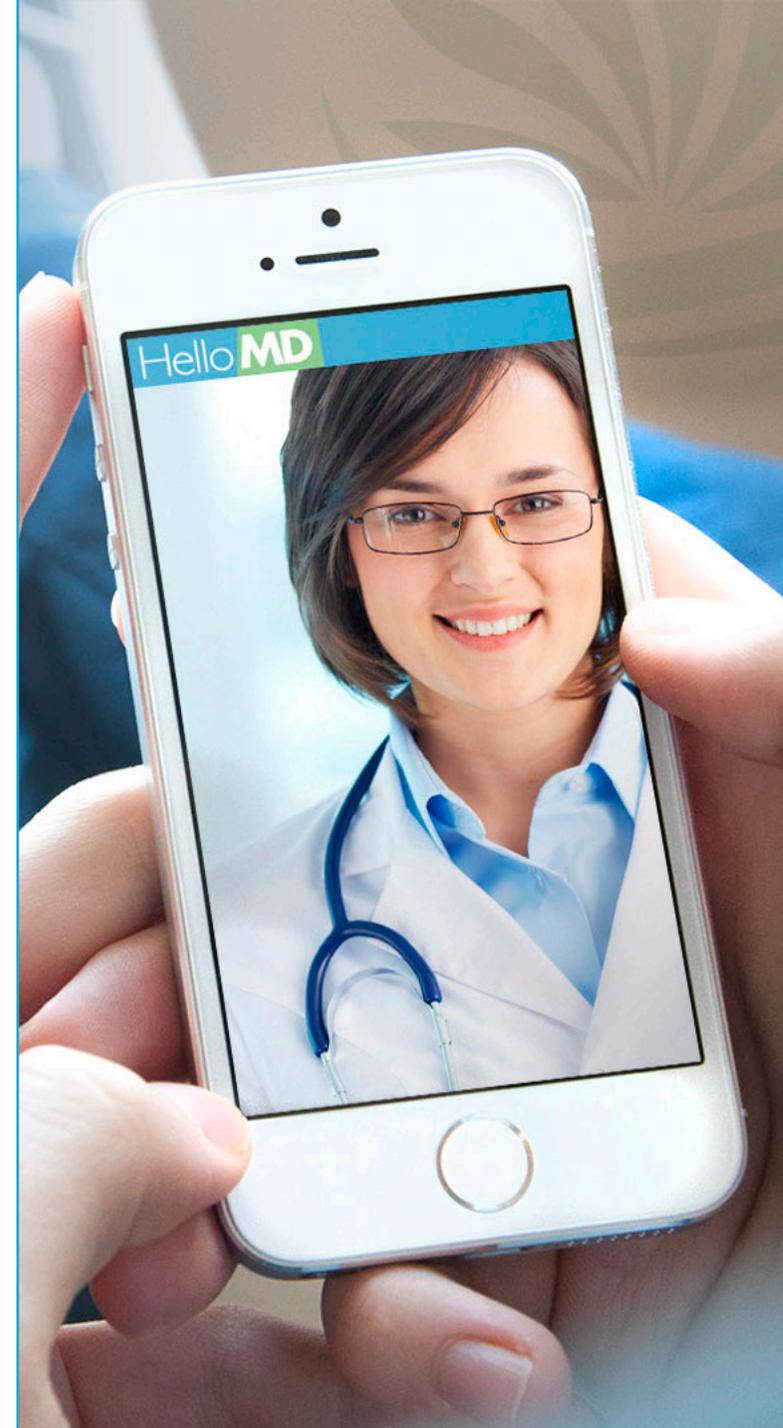
Executive Summary

HelloMD is the largest community of patients using medical marijuana for health & wellness in the country. The company provides patients with access to physicians online via live video (Telehealth) for medical consultations, medical marijuana recommendations, treatment information and advice.

A survey was conducted in January 2016 of more than 17,000 patients with 1,400 responding within 7 days (8.2%). The company believes this to be the largest (and most comprehensive) medical marijuana patient survey conducted to date.

The survey attempted to establish answers to:

- How are the demographics of medical marijuana patients changing as the industry grows?
- What medical conditions are people using medical cannabis for and how effective is cannabis as a treatment?
- What ancillary effects (side effects or benefits) are experienced?
- How are people using cannabis, in terms of modality, frequency, dosage?
- How are the social perceptions of cannabis use changing over time, with friends, family and public at large?
- What are patients purchasing habits, spending preferences and sources of information?



Key Findings

- The most common conditions being treated by medical marijuana include **chronic pain, anxiety, stress and insomnia**.
- A large variety of conditions, including serious medical issues as well as everyday health & wellness concerns are being treated.
- **84% of respondents strongly agree** that cannabis provides them with relief from their symptoms.
- Of those using cannabis as treatment, **66% use it as the primary treatment** modality for the medical issue and the rest as supplemental treatment to other methods.
- **64% of respondents use cannabis daily**, and an additional 28% at least weekly.
- There were **few to no reports of negative consequences** of cannabis use, with over 96% of users either somewhat likely or highly likely to recommend cannabis use to friends, family or others seeking improved wellbeing.
- Respondents reported **beneficial side effects** of relaxation, mood elevation, better sleep, a replacement for the use of alcohol or as a libido or sexual enhancement.
- Clear **differences between men and women** were seen in key areas of use, such as modality, dosage, product selection, spending habits, psychoactive preferences and motivations for use.
- Women and older people reported preferences for products like tinctures and topical creams, while men and younger people prefer the more traditional smoke and vaporizer methods of consumption.
- Middle aged and elderly were more directed to pain management, while younger age groups are treating stress, anxiety, mental-health disorders, nausea and issues with appetite.
- 86% of people show a strong preference for a **particular cannabis strain**, and observe differences in how different strains affect them.

Methodology

The survey was conducted online, and canvassed medical marijuana patients between the ages of 18 and 80. Patients were asked to complete a questionnaire consisting of 31 questions, all of which were either binary choices or multi-select.

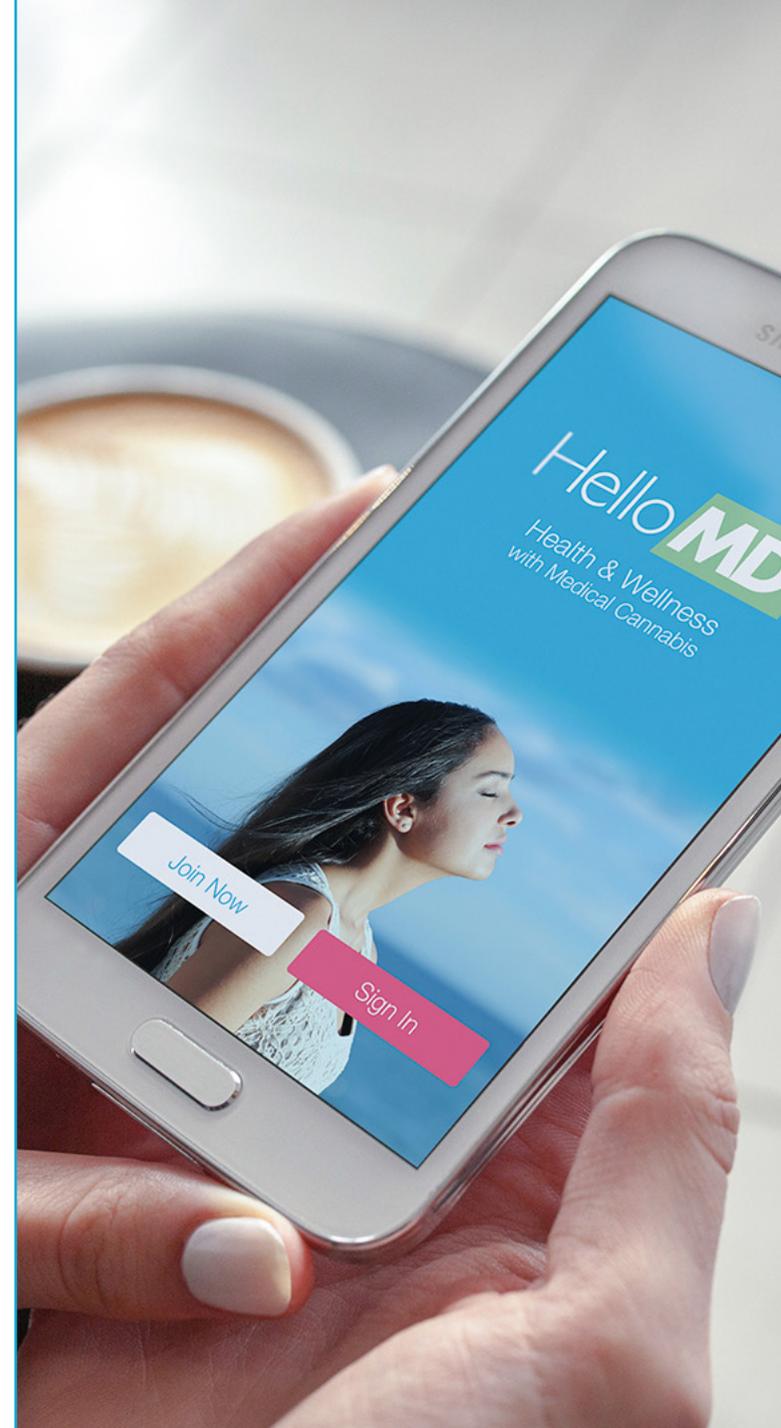
There was a final text box for patients to leave comments. The answers were collected over a period of seven days during January 2016.

Questionnaire topics included:

- Demographics
- Medical reasons for cannabis use
- Usage habits, preferences and knowledge
- Perceived benefits and / or negatives of use
- Social perceptions about use with family and friends
- Purchase information and spending habits

Survey results were extracted to Excel and analyzed by a data scientist.

NOTE: *The results reported can only be considered the opinions of the survey participants. They cannot be generalized to represent the entire patient population as a whole.*



Cannabis is the only thing to give me complete relief from migraines. Doctors initially prescribed heavy narcotics in an attempt to reduce the intensity and the frequency of migraine. For years I tried different drug products. All toxic. All ineffective. At best, the drugs would just dull the pain and I'd be in a constant stupor. At worse I'd be suicidal. Cannabis, on the other hand, relieves me of the migraine almost immediately and almost entirely. Thank the Lord for this amazing plant. ”

— Survey respondent



Demographics

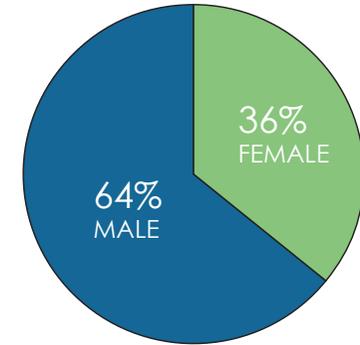
What are the demographics of cannabis users, and how are they changing over time?

Survey responses are broken out by several demographic categories, as follows:

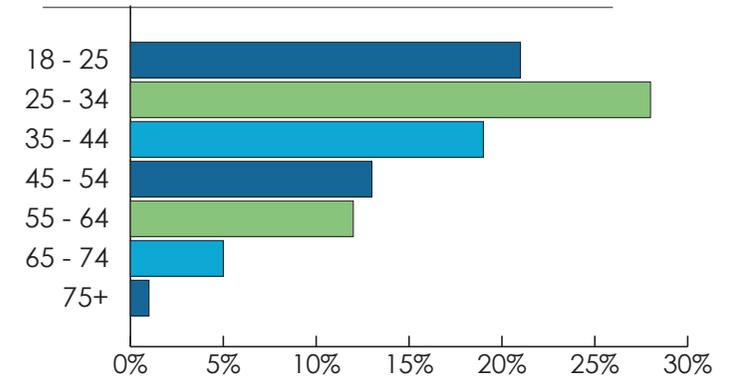
- Of the more than 1,400 respondents, 64% were male, and 36% female.
- Most patients (84%) had some form of college education with 14% having completed postgraduate work.
- Most patients (84%) lived in or near a major city; 45% are parents.
- 61% were between the ages of 25 and 54 years with 17% being over the age of 55.
- The largest age category was 25 to 34 years at 28% of the total.

KEY FINDING: *The demographics of patients surveyed by HelloMD showed marked differences from those of businesses more focused on the emerging recreational marijuana market. Those customer groups tend to be heavily dominated by a younger, male demographic; HelloMD patients using cannabis for health and wellness tend to be older, and more evenly balanced between genders.*

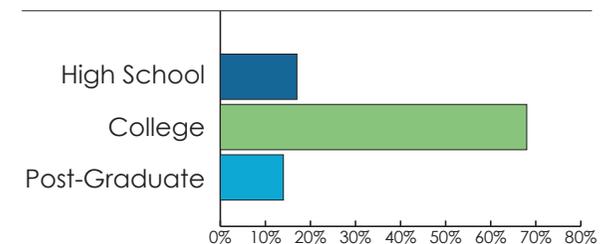
GENDER



AGE



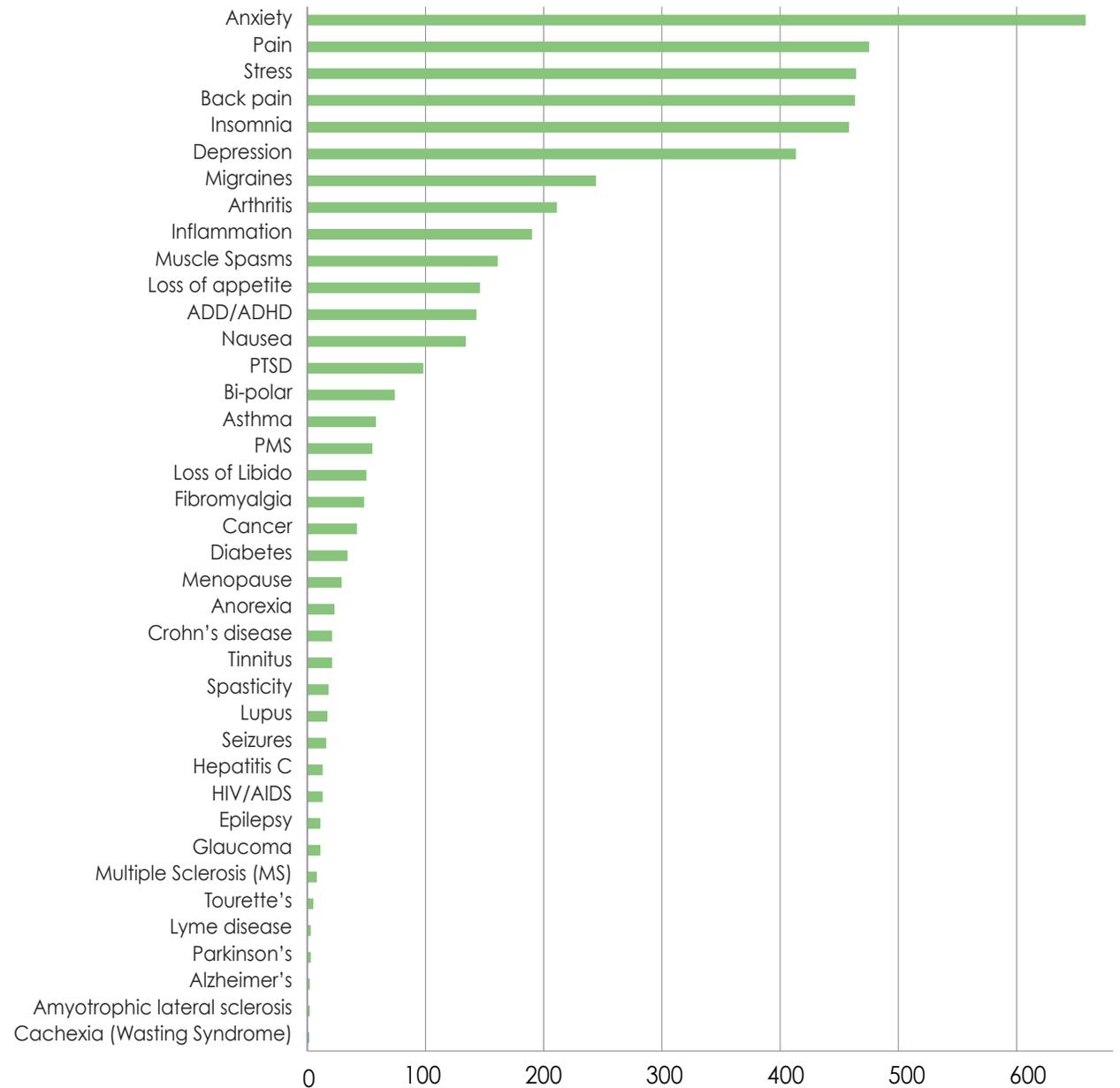
EDUCATION



Medical Reasons for Cannabis Use

Why are people using cannabis, does it work for them, and what side effects / negative or positive ancillary effects are experienced?

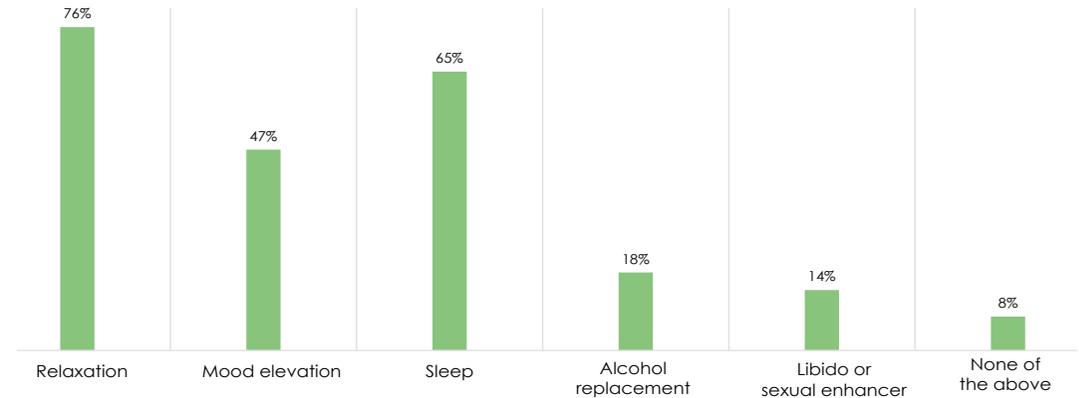
- No major differences were observed between gender with regards to primary medical use
- Middle aged and elderly patients were more inclined to use cannabis for pain management, while younger age groups were more likely to use it for stress / anxiety, mental disorders and nausea / appetite



Other Motivations for the Use of Cannabis

- Almost all users (76%) reported using cannabis for relaxation, and 65% for use as a sleep aid
- While almost all users reported experiencing other benefits and motivations for their use of cannabis, these six categories tended to decrease with older people, who focused more on the primary medical motivation for use
- 65% use cannabis as the primary source of treatment for their medical condition, and 35% as a supplemental treatment
- 96% of users report that cannabis enhances their mood in a positive way, with 77% strongly agreeing
- 79% of people agree that cannabis makes them feel sleepy, yet only 21% feel that it demotivates them
- 85% of people feel that cannabis use enhances their creativity
- Women are slightly more likely than men to use cannabis as a libido enhancer (8% vs 5%)
- Men are more likely to use cannabis as an alcohol replacement (10% vs 6.5%)

Besides your main condition(s), are there other reasons you use cannabis?



KEY FINDING: People are using cannabis for symptomatic relief of a whole host of medical complaints, from the seriously ill, to more everyday complaints like anxiety, stress and insomnia. Almost without exception the experience is overwhelmingly positive, with 85% reporting significant efficacy for treating their medical concerns, 76% reporting increased relaxation, 77% stating that it “enhances their mood in a positive way.” 65% of people using cannabis consider it to be the primary treatment of choice for their condition, with many choosing to forgo other treatments, including prescription medications.

Use Preferences

What is driving consumer preferences in cannabis choice?

Are the different strains meaningful, or is this just a marketing tactic invented by producers? Do men and women dose differently, and how educated are they as consumers as it relates to dosage, THC and psychoactive effects?

Consumer sales data indicates a significant rise in the amount of edibles sold, and many new product entrants are being created as edibles, tinctures and topical creams or oils.

- Despite the above 71% of people still favor smoking cannabis, and 66% enjoy vaporizing it
- Edibles make up 48% of the market with tinctures and topicals at 16% and 13% respectively
- Younger people prefer to smoke or vaporize, while the use of topicals and tinctures increases with age

Dosage Preferences

62% of people consume less than 50mg of cannabis in a single dose with the most common dose being between 10 and 50mg in a single dose. There is a significant portion of the market (25%) that prefer to consume less than 10mg of THC in a single dose, data which supports the new trend of 'micro-dosing'.

- Despite the obvious importance of dosing, a full **29% of people are not aware** of the dosage they typically consume
- Only 7% of users regularly consume more than 50mg of THC in a single dose, which calls into question the appropriateness of 200mg edibles and other stronger products

Dosage: Men dose stronger than women, women much less aware of dosage

Dose	Female	Male	Grand Total	Female	Male	Grand Total
Less than 10mg	131	175	306	29.2%	22.2%	24.8%
10 – 50mg	138	329	467	30.8%	41.8%	37.8%
More than 50mg	24	68	92	5.4%	8.6%	7.4%
I don't know	155	216	371	34.6%	27.4%	30.0%
Grand Total	448	788	1236	100.0%	100.0%	100.0%

Use Preferences *(continued)*

Different Cannabis Strains

86% of people agree that different strains create different feelings and effects, with 70% having found a favored strain that they turn to regularly. This is clearly therefore not just a tactic by producers to sell more products. We see a need for more research in this area, to produce repeatable, consistent results with patients as some strains clearly achieve more reliable results for different medical conditions.

We see an even balance in preference for psychoactive vs. non-psychoactive products with a slight advantage to psychoactive products at 28%.

- Awareness, and preference for different strains tends to decrease with age, with younger people being more aware and having more defined preferences

The Educated Cannabis Consumer

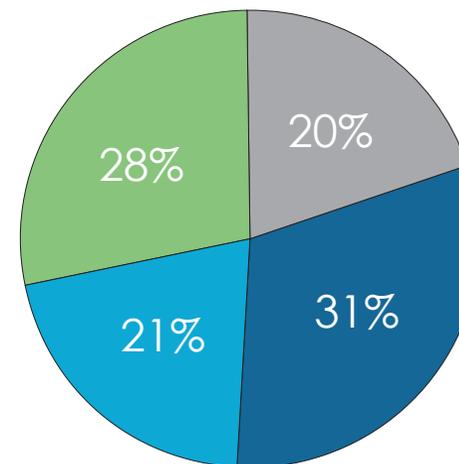
Consumers show that they do for the most part have a basic understanding of cannabinoids, psycho-activity, and how different cannabinoids effect people.

- 81% of people understand the difference between THC and CBD while 18% either do not, or are unsure

- 51% of people managed to find a product that solved their medical concerns in less than 1 month of looking, 21% took up to three months and 27% took longer than 6 months, or are still looking

Most commonly (67%) of people use 2 or 3 different products regularly, with 12% using more than 3 different products. 20% use just a single product.

Do you prefer psychoactive cannabis products?



■ Yes ■ No ■ Somewhat ■ Don't Know



Cannabis use has been extremely beneficial to me. It has helped me quit drinking and keep my diet in check. I do not like to take pills and have had problems with sleeping pill addiction. Cannabis provides me with better relief from insomnia and pain without the side effects of pills. ”

— Survey respondent

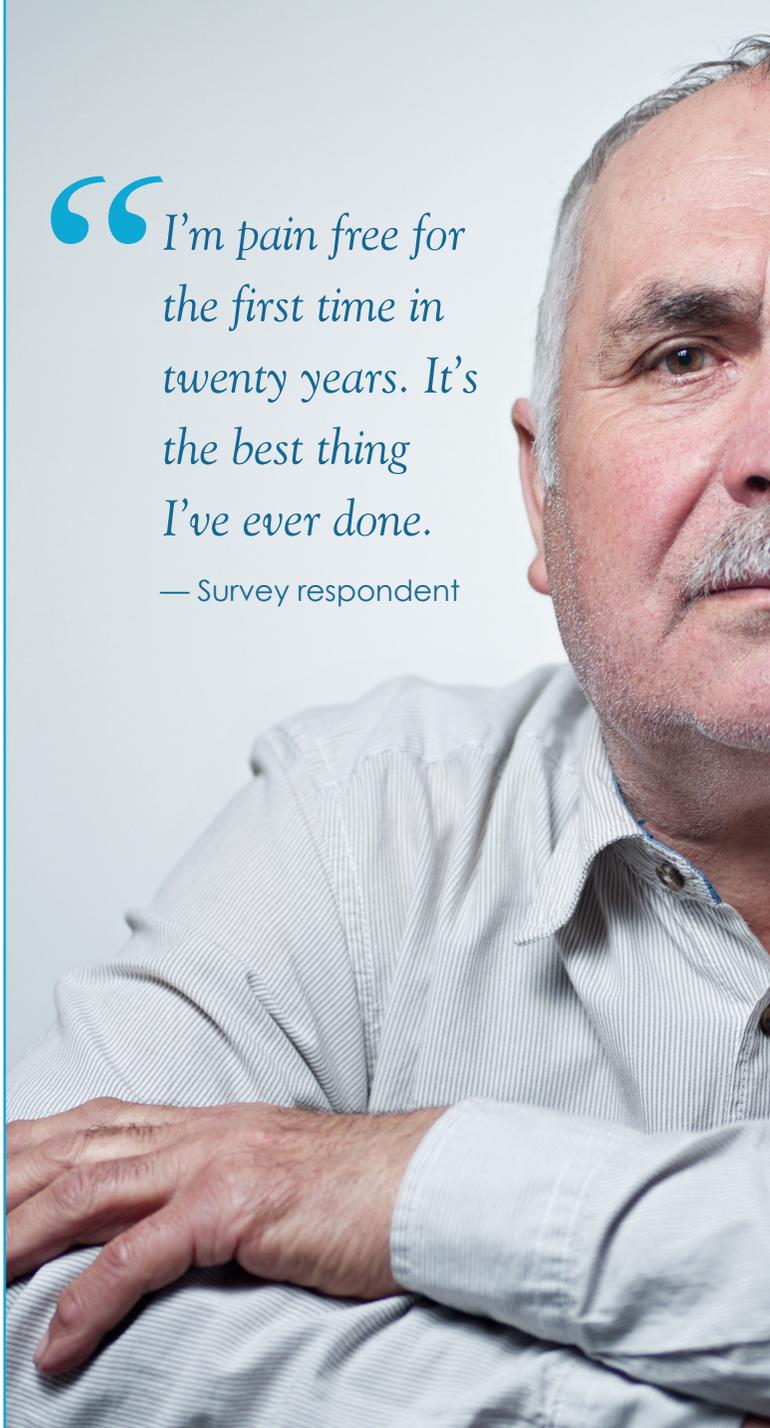
Purchase Preferences

How much are people really spending on cannabis?

Where do they like to shop, and does this differ by gender, or age? Where are they getting their information from for purchase decisions? Are consumers being well served by information sources available to them today?

61% of respondents get their information for product selection from a 'Bud Tender', meaning the employee at their local dispensary. If you consider the seriousness of medical conditions being treated, and the high value of medical efficacy, this seems like an unorthodox source of information. 31% of people prefer a medical professional. Additional sources of information include websites (51%) and friends 35%. 14% feel they do not need advice.

- 67% feel that there are enough sources of information available to them, and 32% are looking for more
- Men are more independent (websites or no advice) when they shop, while women are more consultative preferring Bud Tenders, friends and medical professionals by a margin of 4%
- Younger people are more likely to get their advice from friends, while older people consult with a Bud Tender



“I'm pain free for the first time in twenty years. It's the best thing I've ever done.

— Survey respondent

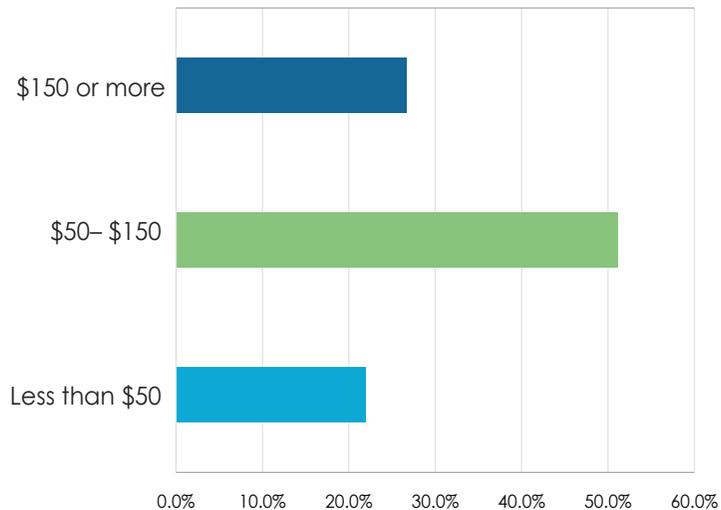
Purchase Preferences *(continued)*

Where do you buy your cannabis?

- 44% of the market regularly use a delivery service to purchase cannabis
- 61% prefer to use a local dispensary
- 5.4% have used mail-order services
- 21% rely on other sources (which would include the illegal market, or friends)

Women have a preference over men for the use of delivery services (35% vs 32%).

I spend approximately this amount on cannabis products each month?



“Cannabis has been a life saver. After a pretty bad car accident, I found myself having more and more anxiety attacks. I soon discovered how certain strains of cannabis can quickly effect my anxiety issues and keep attacks from happening.

— Survey respondent

Purchase Preferences *(continued)*

How much do you spend on cannabis products?

72% of people spend at least \$600 each year on cannabis products, with 22% spending at least \$1,800 each year. Medical marijuana would appear to represent a significant potential savings to consumers over traditional pharmaceuticals.

- Overall, women tend to spend less than men (26% vs 20%) at \$50 level, with men spending more than women at the \$150+ level (29% vs 23%)
- Monthly spending declines as people age. Younger people (18 - 44) exhibit higher spending levels by a margin of 9%

Monthly Spend by Age: Spending declines with age.

	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older	Total
\$150 or more	30.2%	27.9%	31.9%	21.3%	22.1%	15.7%	26.8%
\$50 - \$150	52.4%	51.3%	47.0%	52.1%	48.3%	55.7%	50.7%
Less than \$50	17.5%	20.8%	21.1%	26.6%	29.7%	28.6%	22.5%

Sources of Advice: Younger age groups seek advice more frequently from friends, while older age groups rely much more upon the bud tender.

	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older	Total
Dispensary or Bud-Tender	29.3%	31.2%	30.4%	35.1%	35.4%	37.5%	31.9%
Websites	25.4%	25.0%	27.5%	24.6%	30.0%	27.9%	26.1%
Medical professional	15.5%	17.1%	17.2%	16.2%	12.9%	14.4%	16.1%
Friends	21.6%	19.5%	16.5%	17.7%	13.3%	13.5%	18.3%
I don't need advice	8.2%	7.1%	8.5%	6.3%	8.3%	6.7%	7.6%

“I’m a disabled veteran with PTSD. Cannabis is what keeps me alive. Nothing else works. Nothing.”

— Survey respondent



Social Perceptions of Marijuana Use

Medical marijuana is rapidly moving into the mainstream of American society, with more states passing legislation, stories in the media and increasing acceptance of the medical benefits. How are social perceptions changing among users with family and friends?

Amongst those that use medical marijuana, 82% are open with family members about their use with 44% strongly agreeing. 15% still hide their use from family members (perhaps their children, although this is unclear from our data).

59.5% of patients are open with their close friends and a further 35% with all friends (close and otherwise). Only 5.3% do not admit to friends that they use medical marijuana.

The same number (59%) state that they are open with members of the general public about their use, while 39.5% hide their use from the public at large.

Do you recommend the use of cannabis to friends and family?

Key Finding: 96% of people that use medical marijuana are either highly likely, or somewhat likely to recommend its use to friends and family. This type of social acceptance is likely to continue to fuel rapid adoption across all demographics of society.



Social Perceptions of Marijuana Use *(continued)*

Social Perceptions by Gender

- Both men and women are generally open about their use with friends and family
- Women are more guarded with the general public than men (44% vs 37%)
- Women are also more likely to recommend marijuana use to others (71% vs 63%)

Social Perceptions by Age

Older people are both more guarded about their use, and less likely to recommend use to others as compared with younger people.

	Female	Male	Grand Total	Female	Male	Grand Total
Open with family members						
Do not agree	62	112	174	13.9%	14.5%	14.3%
Does not apply	9	17	26	2.0%	2.2%	2.1%
Somewhat agree	181	300	481	40.6%	38.7%	39.4%
Strongly agree	194	346	540	43.5%	44.6%	44.2%
Grand Total	446	775	1221	100.0%	100.0%	100.0%
Open with friends						
All friends	140	284	424	31.4%	36.6%	34.7%
Close friends only	282	450	732	63.2%	58.1%	60.0%
Not open with friends	24	41	65	5.4%	5.3%	5.3%
Grand Total	446	775	1221	100.0%	100.0%	100.0%
Open with the public						
Do not agree	199	287	486	44.6%	37.0%	39.8%
Somewhat agree	181	332	513	40.6%	42.8%	42.0%
Strongly agree	66	156	222	14.8%	20.1%	18.2%
Grand Total	446	775	1221	100.0%	100.0%	100.0%
Becoming more open						
12 months ago	78	118	196	17.5%	15.2%	16.1%
2 years ago	103	219	322	23.1%	28.3%	26.4%
6 months ago	120	184	304	26.9%	23.7%	24.9%
Does not apply	145	254	399	32.5%	32.8%	32.7%
Grand Total	446	775	1221	100.0%	100.0%	100.0%
Would recommend cannabis						
Highly likely	319	485	804	71.8%	63.0%	66.2%
Somewhat likely	117	263	380	26.4%	34.2%	31.3%
Unlikely - will not recommend	8	22	30	1.8%	2.9%	2.5%
Grand Total	444	770	1214	100.0%	100.0%	100.0%

Conclusions

Medical marijuana is rapidly being adopted by mainstream Americans nationwide. Driven by a growing understanding of the therapeutic benefits of cannabis use across a large spectrum of health and wellness maladies, supportive legislation, and a decrease in social stigma associated with the drug.

Our survey data indicates overwhelmingly positive results reported for the treatment of chronic pain, stress, anxiety and insomnia (among others). Additional benefits include mood elevation, relaxation and its use as a replacement for alcohol. **84% of respondents strongly agree that it provides relief** from their symptoms, and 94% would recommend it to their friends and family as a treatment.

Cannabis has the ability to really make an impact on the betterment of society. To pick just one example, that of chronic pain:

The Institute of Medicine of the National Academy (*ref. 1*) claims that chronic pain alone afflicts 116 million Americans, and costs the nation over 600B in medical treatment and lost productivity. Prescription opioids (synthetic derivatives of opium) have increased ten-fold since 1990, and at great cost to peoples' health and well-being – **44 people die every day from prescription opioid overdose**. In 2007, prescription opioid abuse costs were about \$55.7 billion in the US. Of this amount, 46% was attributable to lost productivity, 45% to healthcare costs and 9% to criminal justice costs. This is not to mention other high societal costs such as suicide and addiction. By comparison, **there has never been a death from overdose attributed to cannabis**. In fact, no deaths whatsoever have been attributed to the direct effects of cannabis. Overwhelmingly, independent research has shown the cannabis safety record to be considerably superior to that of pharmaceutical pain medications.

“I have a spinal cord injury from a car accident. I was taking liquid methadone for chronic pain for 17 years and with the help of cannabis was able to wean myself off of the methadone. Cannabis keeps me sane and healthy.”

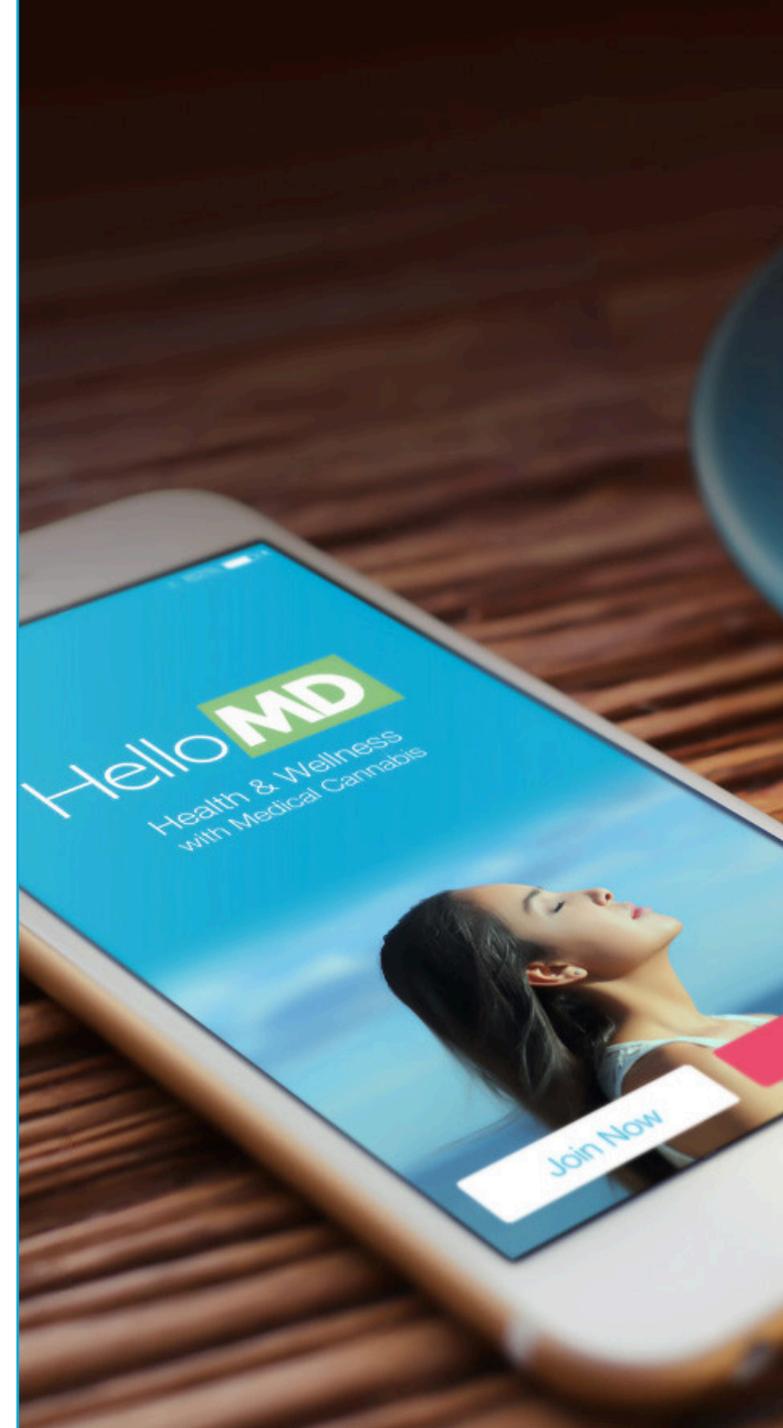
— Survey respondent

Conclusions *(continued)*

Overall, the data collected, and the conversations observed, strongly indicate a new demographic of cannabis user. Moreover, this new demographic is sizable to the extent of eclipsing the recreational cannabis user. Still, the prevailing perception of a medical marijuana patient is that of a masquerading recreational user (a stoner). While there is no question that some of the medical marijuana patient population conform to this perception, our research and analysis show a much larger portion be genuinely seeking an alternative to traditional medication for improved health and wellness. Our data indicates that 78% of those using cannabis for health and wellness are above the age of 25. In stark contrast to the stoner stereotype, these people are highly educated working professionals. Many are parents. They could be your friends, your colleagues, or your neighbors. All of them have legitimate health issues. All of them are seeking alternatives to traditional prescribed medication considered toxic and laden with the potential of negative side effects. Many are trying cannabis for the first time. Almost all of them are seeking information from trusted sources.

The growing demand for cannabis as a wellness solution is further supported by the just-published ArcView Report (*ref. 2*), on the state of legal marijuana markets. The report cites cannabis as not only the fastest growing industry in the US (estimated at 30% compound annual growth rate and \$5.4B in 2015 sales) but also suggests non-recreational consumption (i.e. medicinal, health and wellness uses) will drive close to 50% of the expected \$21.8B of sales in 2020. We expect much of this growth will come from medicinal users entering the cannabis market for the first time. This strongly suggests, considering the efficacy of this treatment modality, that mainstream methods for achieving health and wellbeing are at the precipice of disruption.

References: 1. Institute of Medicine of the National Academy, author. *Relieving Pain in America*. 2011
2. ArcView Market Research. *The State of Legal Marijuana Markets*, 4th Edition. February 2016.



Appendix A: Comments from Participants

“Its been s tremendous help! I'm a poster child for alternative treatments. I've spent many years on traditional medication to treat anxiety, depression, nerve pain, generalized pain, and gastrointestinal issues. I use prescription drugs at a minimum now.

I have been using cannabis for 3 months now and it has changed my life for the better. It doesn't take away pain entirely but it does dial it back to a manageable level. Prior to getting my recommendation I was as good as house-bound because of nerve pain. Cannabis has freed me.

After spending the last decade in the fog of pain, I now have my life back. I wish I'd found cannabis earlier!

Cannabis has been a life saver for me. After recovering from a severe car accident (that happened years ago), I have been left with chronic pain and frequent anxiety attacks. It took me a while to educate myself, but I am pleased to report that I have found individual strains of cannabis that can solve for both my pain and my anxiety. I am so happy to be rid of those toxic pharmaceuticals. I wanted to shout it from the rooftops!

Medical cannabis has been the ONLY solution for my insomnia and neuropathic pain. Neither could be resolved through traditional pain medications.

Cannabis use has freed me from opioid use and it has been the most effective in treating my PTSD.

Before cannabis I was suffering from kidney and liver failure - both were side-effects of prescribed medications. I very nearly died. It was my psychiatrist that suggested I try medical cannabis. The product of societal stigma, I was reluctant to do so. Yet, it turned out to be the best decision I ever made. So far, cannabis has not revealed any negative side effect (especially when compared to what I'd been on). My organs have restored and, as a bonus side-effect, my mood is much better. I feel really, really, good (rather than generally depressed as I was before).

Besides the medical benefits, cannabis helps me unwind, relax, and reduce my dependency on alcohol.

I have a spinal cord injury from a car accident. I was taking liquid methadone for chronic pain for 17 years and with the help of cannabis I was able to wean myself off of the methadone. Cannabis keeps me sane and healthy.

It relaxes me and let's me think and be positive all the time. I also have more energy than before. Those that new me before I started medical cannabis don't recognize the new me. I love the new me!

Appendix A: Comments from Participants *(continued)*

“ I used to be strongly against medicinal marijuana, I thought everyone who had a prescription was just looking for an excuse to be a stoner. A colleague of mine (who is a lawyer) explained the benefits and I began my own research. I was surprised to learn of its benefits. I had been reliant on traditional pain medication to treat a historical sport injury so, intrigued, I tried medical cannabis. I was immediately amazed by the results. How we have all been duped! I have been able to stop using traditional pain pills almost entirely.

Without cannabis I would not be able to sleep at night peacefully, my migraines would overwhelm my daily life, and I would not be able to function.

Cannabis has helped me in so many areas of my life. It mainly helps with the inflammation from my autoimmune disease but also seems to assist in my focus on tasks and creativity. I am very happy it is becoming more mainstream and that there are so many different strains and options to get exactly what need.

Without cannabis, I would be back to being overly medicated on highly toxic, highly questionable, antipsychotic medication which only exacerbated my symptoms. With cannabis, I FUNCTION. I'm not just getting through my day anymore. I'm living and truly experiencing and gaining from life.

Cannabis is a great alternative to pain pills.

I have suffered from Insomnia for more than 15 years. I was on all sorts of sleeping pills and eventually they lost effectiveness while I grew fat and irritable. So I tried medical cannabis. It works! I now have no trouble getting to sleep. I alternate vape-ing with edibles depending on the dose I feel that I need, and how quickly I want the effect. Truly a positive life changing drug. Thank you so much. It is also of note that this is my first experience with cannabis.

Cannabis has freed me from some of the most debilitating PTSD symptoms where other medications and years of therapy haven't. I can't tell you how grateful I am for the relief.

Cannabis has replaced 2 out of 3 medications I was on for manic bipolar disorder, depression, and anxiety. It curbs the side effects to the last medication I still need. Before CBD oils, and THC doses, I would have seizures, muscle spasms, nausea, and fatigue.

It's been a total game changer in terms of my ability to process stress. I learned so much from my HelloMD doctor consultation, before which I had little understanding of CBD, THC, and what would be right for me. Thank you for giving me my life back.