



AUSTRALIAN MEDICINAL CANNABIS INDUSTRY QUICK SURVEY AUGUST 2019

If you were among one of the many participants in our recent online Cannabis Industry Survey – thank you so much for taking part; responses have been high, and we have to say, very encouraging.

Although as we made clear at the time, individual replies were and remain in confidence and for internal use only, speaking more generally we thought you'd be interested to know what we discovered – so below is an overview of a few of the things Industry seems to be telling us....

Of those contacted just over half (**51%**) **responded**, which is excellent going; again, thank you (we'll try not to draw too many conclusions of how highly patients and patient advocates are regarded by those who chose not to participate!).

Of those surveyed, **17% responded anonymously** – perfectly ok by us.

Where the Survey questions themselves were concerned, we're pleased to note how 'on the same page' we appear to be, particularly in respect of access to cannabis and cannabis products by patients: **75%** of those surveyed believe '**unsatisfactory pathways**' represent a major barrier to growing and developing Australia's medicinal cannabis industry (giving it 8/10 or more in importance where 10 = 'very important' and '1 = 'not important. **53.5%** gave it a '10'). Only around **7% in fact don't see this as too big a problem** and give it less than 5/10.

Related to the above, a whopping **78.5%** think **expanding domestic access** to medicinal cannabis and cannabis products is '**very important**' to developing their business, giving it 8/10 in importance or above. **68%** gave it a '10'.

	1	2	3	4	5	6	7	8	9	10
Expanding domestic access to medicinal cannabis and cannabis products	0.00% 0	0.00% 0	3.57% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	17.86% 5	10.71% 3	67.86% 19

Other areas that appear to be issues at least for some are as follows:

25% gave 'lack of public awareness about medicinal cannabis' a '10' for importance as a major barrier to growing Australia's new cannabis industry while **68%** gave it 7/10 for importance or over. These were in the same ball park as those who also felt **poor business processes within Cth Department of Health/ODC** had much to answer for. **85%** gave 'opposition to use of MC by medical the establishment' 7/10 or higher (though only **11%** gave it a '10').

Half of the respondents (exactly **50%**) rated **current scheduling of cannabis & cannabis products either 9 or 10 in importance as a barrier**, so this too is seen as a major issue by many, though **25%** gave this five or less for importance. Numbers were higher for 'lack of political will to improve system' as a perceived barrier to the advancement of industry (**64%** ranking this 8 or more in importance) while **just over a third (35%)** named 'insufficient investment by Government' as representing a major problem.

What are the main barriers to growing and developing Australia's medicinal cannabis (MC) industry? (1=not a barrier, 10=major barrier)

	1	2	3	4	5	6	7	8	9	10
Unsatisfactory patient access pathways	0.00%	0.00%	3.57%	3.57%	0.00%	7.14%	10.71%	17.86%	3.57%	53.57%
Lack of public awareness about medicinal cannabis	0.00%	7.14%	3.57%	7.14%	10.71%	3.57%	25.00%	7.14%	10.71%	25.00%
Poor business processes within Cth Department of Health/ODC	0.00%	3.57%	0.00%	10.71%	14.29%	3.57%	0.00%	28.57%	14.29%	25.00%
Lack of knowledge/education among doctors	0.00%	0.00%	0.00%	0.00%	3.70%	7.41%	7.41%	18.52%	25.93%	37.04%
Opposition to use of MC by medical establishment	0.00%	0.00%	3.57%	3.57%	7.14%	10.71%	28.57%	10.71%	25.00%	10.71%
Current Scheduling of cannabis & cannabis products in Australia	0.00%	3.57%	10.71%	0.00%	10.71%	10.71%	3.57%	10.71%	25.00%	25.00%
Lack of political will to improve system	0.00%	0.00%	10.71%	7.14%	3.57%	3.57%	10.71%	17.86%	25.00%	21.43%
Insufficient investment by Government	0.00%	3.57%	7.14%	3.57%	14.29%	17.86%	17.86%	7.14%	7.14%	21.43%

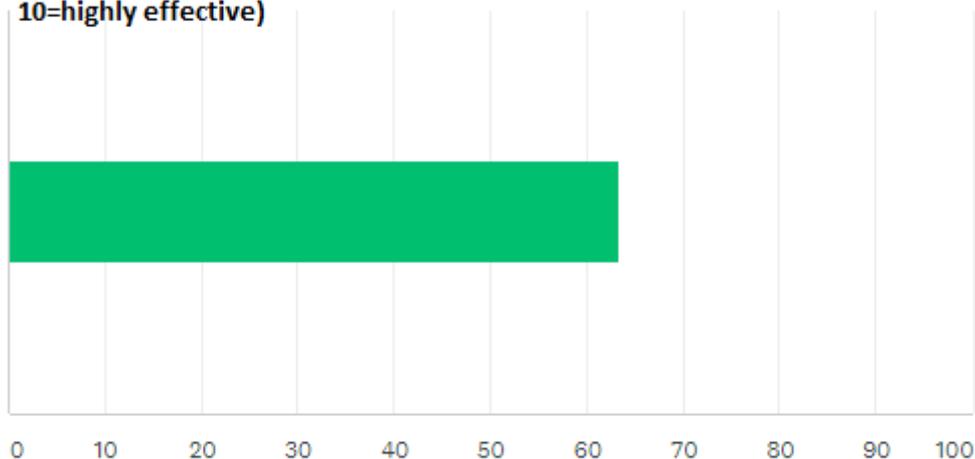
Where UIC is concerned, we were pleased that the majority of respondents saw eye to eye with us on the four areas of focus and work we've identified as our priorities going forward - a breakdown of these are as follows:

- **Information provision/awareness raising** – 71% gave this **8/10 or above in importance** (32% gave it a 10);
- **Education of healthcare professionals** – 86% give this **8/10 or above in importance**, 50% giving it a '10' with no-one at all giving it less than a '6';
- **Political lobbying** – 78.5% awarded this **8/10 in importance** or above (42% gave it a '10');
- **Challenges at law (through the Courts) to improve patient access** – this one surprised us; 64% agreed this is a way to go, giving it **8/10 in importance or above**, 39% giving it '10'. Will the Government and others be defending themselves in Court sometime soon? Will Industry be emboldened by such a result? We hope so!

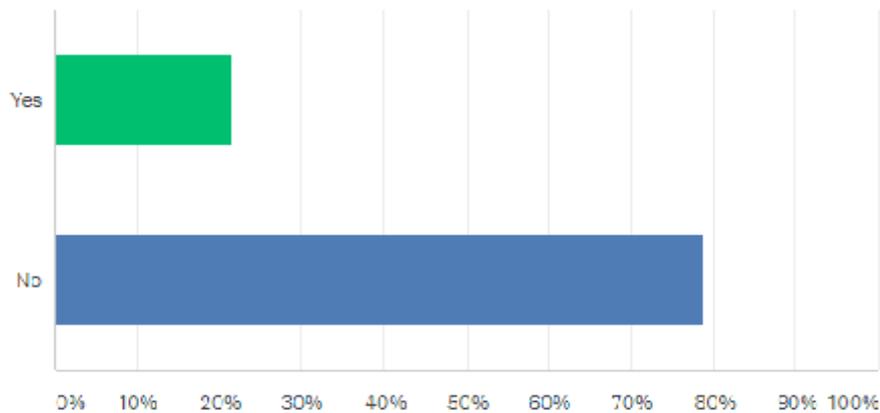
	1	2	3	4	5	6	7	8	9	10
Information provision/awareness raising	0.00%	3.57%	0.00%	0.00%	3.57%	7.14%	14.29%	25.00%	14.29%	32.14%
Education of healthcare professionals	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	14.29%	14.29%	21.43%	50.00%
Political lobbying	0.00%	3.57%	0.00%	3.57%	0.00%	3.57%	10.71%	17.86%	17.86%	42.86%
Challenges at law (through the Courts) to improve patient access	0.00%	0.00%	3.57%	3.57%	10.71%	7.14%	10.71%	14.29%	10.71%	39.29%

Never faint of heart, while we were at it we also asked how effective respondents felt UIC is at communicating our goals and advancing the medicinal cannabis 'cause' – and given the fact that for the last five years we've been operating on the smell of an oily rag, were delighted (and rather shocked) at the **63% effectiveness score** we were given by respondents on average (at the extremes, one respondent gave us **10%** and another **100%**, with most grouped pretty close to the average). Imagine what we could do though if we were better resourced!

On a scale of 1-10 please say how effective you feel UIC is at communicating its goals and advancing the medicinal cannabis 'cause' (1=not effective at all, 10=highly effective)



Less encouraging however were views on whether the Government has its listening ears on when it comes to dealing with Industry. A resounding **78+%** said they felt their views **weren't being listened to or acted upon** while only **21% thought that they were**.



Where business development is concerned, as we've already noted, **78.5%** think **expanding domestic access** to medicinal cannabis and cannabis products is **'very important'** to developing their business, giving it 8/10 in importance or above with **68%** giving it '10'.

Slightly less important but still significant for many were **research and development** of cannabis products and delivery systems and **export** of cannabis and cannabis products – **46% and 36%** of respondents gave these a '10' respectively with **64% and 52%** giving them, again respectively **8/10 in importance** or above.

How important are the following to you in developing your business? (1=not important, 10=very important)

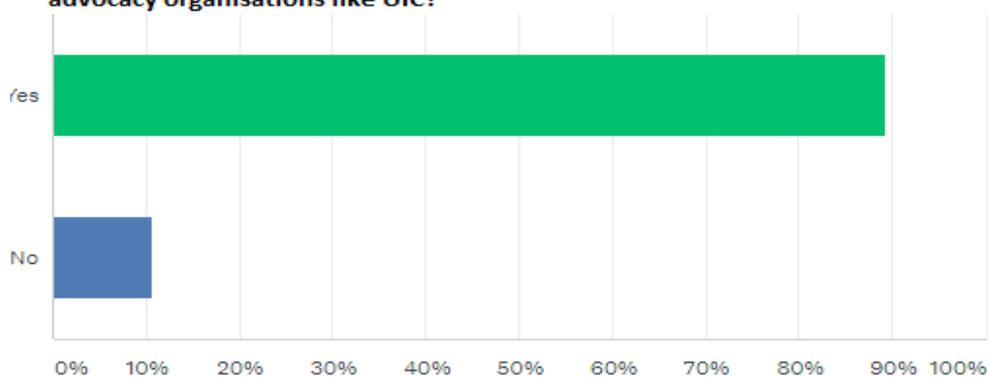
	1	2	3	4	5	6	7	8	9	10
Expanding domestic access to medicinal cannabis and cannabis products	0.00%	0.00%	3.57%	0.00%	0.00%	0.00%	0.00%	17.86%	10.71%	67.86%
Research and development of cannabis products and delivery systems	0.00%	0.00%	7.14%	0.00%	7.14%	10.71%	10.71%	14.29%	3.57%	46.43%
Export of cannabis and cannabis products	7.14%	3.57%	0.00%	3.57%	14.29%	14.29%	7.14%	3.57%	10.71%	35.71%

Though a minority of respondents (**just over a fifth**) believed **working with or publicly supporting organisations like UIC could negatively affect their business**, the really encouraging news was that an overwhelming **89%** thought **lobbying** and other activities would be **more effective if Australia's cannabis industry worked more closely and / or co-ordinated with organisation like ours**.

Do you feel working with or publicly supporting patient advocacy organisations like UIC could negatively affect your business? (If yes, please explain why)

▼ Yes	21.43%
▼ No	78.57%

Do you feel lobbying and other activities would be more effective if Australia's cannabis industry worked more closely and / or co-ordinated with patient advocacy organisations like UIC?



This was borne out by the fact that just under that number (**82%**) said they'd be **interested in working with us in future** – something we'll be following up on with them soon!

Would you be interested in working with UIC in any of the areas identified in Question 2?

Yes	82.14%
No	17.86%

ENDS

