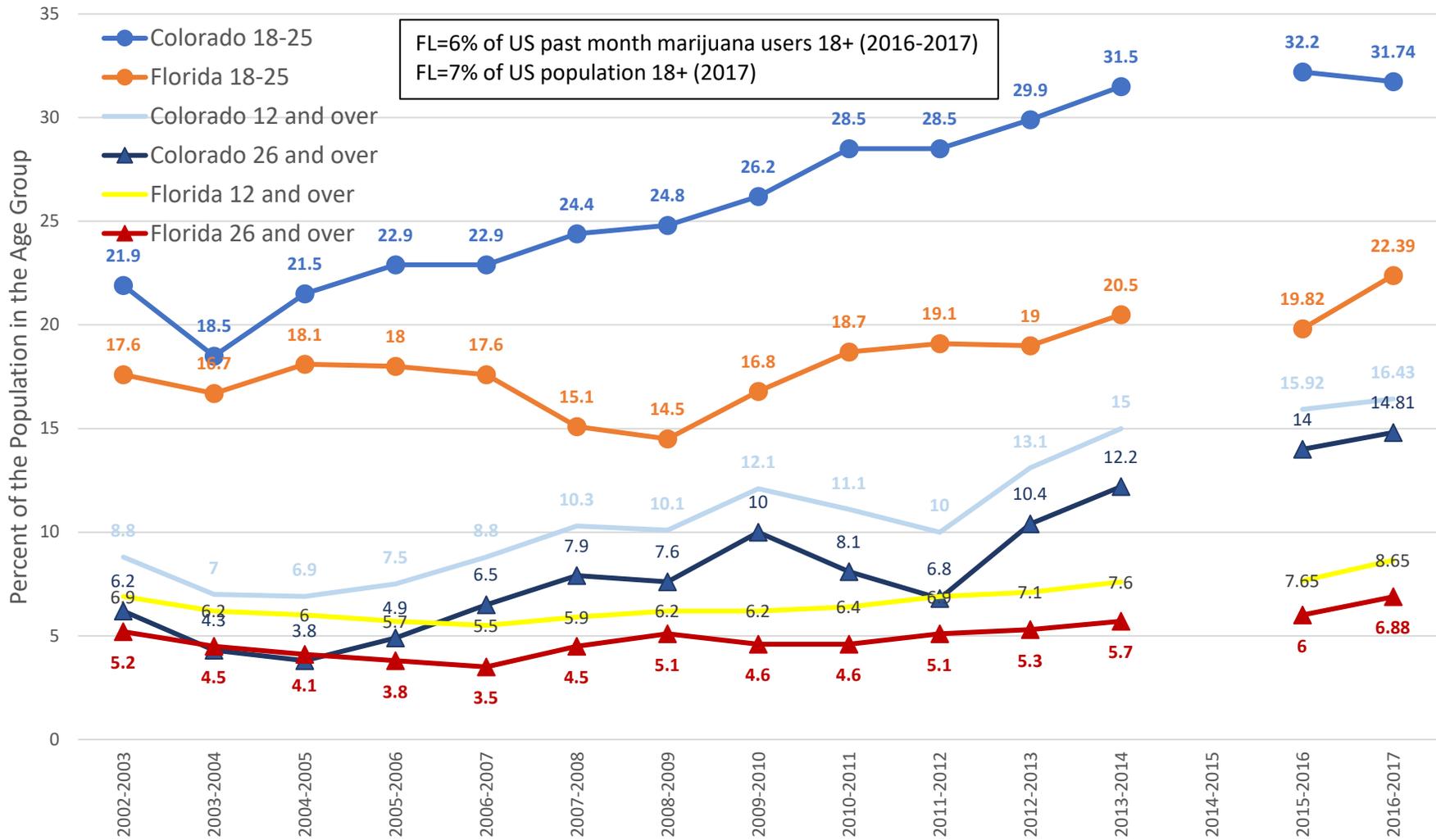


Marijuana Use in the Past Month, by Age Group, Percentages, Annual Averages



Sources: Years 2002 to 2014: Substance Abuse and Mental Health Services Administration, National Survey on Drug Use and Health, Florida and Colorado, 2002–2014, Table 1. Percentage of past month marijuana use among all persons aged ≥ 12, by selected demographic characteristics. Years 2015-16 to 2017: NSDUH 2015-16 and 2016-17 States comparison report, Table 3. Marijuana Use in the Past Month, by Age Group and State: Percentages, Annual Averages, and P Values from Tests of Differences between Percentages, 2015-2016 and 2016-2017 NSDUHs.

Prepared by: Florida Legislature, Office of Economic and Demographic Research, October 2019.

	A	B	C	D	E	F	G	H	I	J	K
1	Marijuana Like Alcohol User Estimates										
2											
3											
4	1 Florida population universe										
5			FY2021-22								
6	Total Florida resident population ¹		22,126,086								
7	FL population 18 years and over ¹		17,656,927								
8	Florida residents 18 to 20 years, percent of population 18 and over ²		4.1%								
9	Florida residents 21 years and over		16,937,496								
10	¹ Source: Florida Legislature, Office of Economic and Demographic Research, Florida Demographic Estimating Conference, July 2019.										
11	² University of Florida, Bureau of Economic and Business Research, Florida Single Year of Age Population Projections, 2018 Estimate as Base.										
12											
13											

	A	B	C	D	E	F	G	H	I	J	K
1	Marijuana Like Alcohol User Estimates										
14	2 Florida illegal marijuana users										
15			Marijuana Use within the Past Year								
16	US prevalence among 18 years and over, 2016-17 rates ³		14.73%								
17	Colorado prevalence among 18 years and over, 2016-17 rates ³		25.65%								
18	Florida prevalence among 18 years and over, 2016-17 rates ³		13.71%								
19											
20	Florida illegal marijuana users, 21 and over (includes medical marijuana) ⁴		2,321,550								
21											
22	³ Source: SAMHSA, Center for Behavioral Health Statistics and Quality, National Survey on Drug Use and Health, 2016 and 2017. Table 2. Marijuana Use in the Past Year, by Age Group and State: Percentages, Annual Averages Based on 2016 and 2017 NSDUHs.										
23	⁴ Note: NSDUH's comparison between the 2015-2016 and the 2016-2017 Florida Past Year rates does not show statistically different results. This analysis assumes that past year prevalence rates among the 21 and over are the same as those among the 21 year and over.										
24											

	A	B	C	D	E	F	G	H	I	J	K
1		Marijuana Like Alcohol User Estimates									
25		3 Florida medical marijuana users (Low-THC, Medical and Smokable)									
26		Medical marijuana users, all ages ⁵	270,574								
27		Users less than 21 years of age	4,933								
28		Medical marijuana users 21 years and over	265,641								
29											
30		Florida illegal marijuana user universe (Florida Illegal marijuana users, 21 and over MINUS medical marijuana users 21 and over)	2,055,909								
31											

	A	B	C	D	E	F	G	H	I	J	K
1		Marijuana Like Alcohol User Estimates									
32		4 Breakout of the Florida illegal marijuana user universe									
		Florida illegal marijuana user universe									
33		(Florida Illegal marijuana users, 21 and over MINUS medical marijuana users 21 and over)									
34											
35											
36		Legal retail as share of total consumption in other states									
		Washington: 40 to 60% of market demand									
37		is met by the illegal market between July 2016, and June 2017 ⁶									
		Oregon: 45% of market demand is met by the illegal market between July									
38		2017 and June 2018 ⁷									
39		Average									
40											
41		Remain black market (50%)									
42		Move to homegrow (2.5%)									
43		Move to retail market (47.5%)									
44											
45		⁵ Source: Tabulations by the Florida Legislature, Office of Economic and Demographic Research of data provided by the Department of Health, Office of Medical Marijuana Use, October 2019.									
46		⁶ Source: Beau Kilmer, Steven Davenport, Rosanna Smart, Jonathan P. Caulkins, Gregory Midgette, After the Grand Opening Assessing Cannabis Supply and Demand in Washington State, Prepared for the Washington State Liquor and Cannabis Board, Published by the RAND Corporation, Santa Monica, Calif., © Copyright 2019 RAND Corporation									
47		⁷ 2019 Recreational Marijuana Supply and Demand Legislative Report, Oregon Liquor Control Commission, January 31, 2019									

	A	B	C	D	E	F	G	H	I	J	K	
1		Marijuana Like Alcohol User Estimates										
48		5 Estimation of the legal retail market in Florida										
49												
50		Frequency of Use Distribution Among Adult Past-Year Marijuana Consumers United States, SAMHSA NSDUH 2013/14			Estimation							
51		Consumers Percent of Total		Florida Illegal Users to Move to Legal Retail Market	Consumed per Use-Day, Grams of Flower per Use Day (Mean US)	Assumed use days per month (EDR assumption)	Assumed use days per year (EDR assumption)	Annual marijuana consumption (grams)	Cost per gram (\$/gram flower) ⁸	Marijuana Retail Sales (\$)	State Sales Tax Collections (\$)	
52		26+ days/month	15.5%	151,366	1.6	30	365	88,397,744	10	\$ 883,977,440	\$ 53,038,646	
53		21-25	3.9%	38,086	1.6	25	300	18,281,280	10	\$ 182,812,800	\$ 10,968,768	
54		16-20	4.7%	45,898	0.67	20	240	7,380,398	10	\$ 73,803,984	\$ 4,428,239	
55		11-15	3.9%	38,086	0.67	15	180	4,593,172	10	\$ 45,931,716	\$ 2,755,903	
56		6-10	5.4%	52,734	0.67	10	120	4,239,814	10	\$ 42,398,136	\$ 2,543,888	
57		1-5	20.2%	197,264	0.67	5	60	7,930,013	10	\$ 79,300,128	\$ 4,758,008	
58		Less than 1 day/month	46.4%	453,122	0.3	0.3	4	543,746	10	\$ 5,437,464	\$ 326,248	
59		Total		976,556				131,366,167	10	\$ 1,313,661,668	\$ 78,819,700	
60		Source: Market Size and Demand for Marijuana in Colorado, 2017 Market Update, Prepared for the Colorado Department of Revenue, Marijuana Policy Group, Leeds School of Business, University of Colorado Boulder, Appendix Figure 2: Frequency of Use Distribution Among Adult Past-Year Marijuana Consumers, Original source of data: Source: SAMHSA NSDUH 2013/14; 2014 Colorado BRFS.										
61		⁸ Dara Kam, WJCTV, "Smokable Medical Marijuana Is Now Legal In Jacksonville And Other Parts Of Florida," March 21, 2019.										
62												
63												

	A	B	C	D	E	F	G	H	I	J	K																																
1	Marijuana Like Alcohol User Estimates																																										
64																																											
65	5 Marijuana: Quantity Consumed per Use-Day																																										
66	Colorado																																										
67	Quantity Consumed per Use-Day, by Consumer Type																																										
68	Grams per Use Day																																										
69	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 35%;">Use, Days per Month</th> <th style="width: 15%;">Lower Bound</th> <th style="width: 15%;">Mean Estimate</th> <th style="width: 15%;">Upper Bound</th> </tr> </thead> <tbody> <tr> <td><1</td> <td style="text-align: center;">0.2</td> <td style="text-align: center;">0.3</td> <td style="text-align: center;">0.6</td> </tr> <tr> <td>1-5</td> <td style="text-align: center;">0.43</td> <td style="text-align: center;">0.67</td> <td style="text-align: center;">0.95</td> </tr> <tr> <td>6-10</td> <td style="text-align: center;">0.43</td> <td style="text-align: center;">0.67</td> <td style="text-align: center;">0.95</td> </tr> <tr> <td>11-15</td> <td style="text-align: center;">0.43</td> <td style="text-align: center;">0.67</td> <td style="text-align: center;">0.95</td> </tr> <tr> <td>16-20</td> <td style="text-align: center;">0.43</td> <td style="text-align: center;">0.67</td> <td style="text-align: center;">0.95</td> </tr> <tr> <td>21-25</td> <td style="text-align: center;">1.3</td> <td style="text-align: center;">1.6</td> <td style="text-align: center;">1.9</td> </tr> <tr> <td>26-31</td> <td style="text-align: center;">1.3</td> <td style="text-align: center;">1.6</td> <td style="text-align: center;">1.9</td> </tr> </tbody> </table>											Use, Days per Month	Lower Bound	Mean Estimate	Upper Bound	<1	0.2	0.3	0.6	1-5	0.43	0.67	0.95	6-10	0.43	0.67	0.95	11-15	0.43	0.67	0.95	16-20	0.43	0.67	0.95	21-25	1.3	1.6	1.9	26-31	1.3	1.6	1.9
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76	<p>Note: Estimates based on Kilmer et al. (2013) and Colorado Marijuana Use Survey results.</p> <p>Source: Market Size and Demand for Marijuana in Colorado, 2017 Market Update, Prepared for the Colorado Department of Revenue, Marijuana Policy Group, Leeds School of Business, University of Colorado Boulder, Appendix Table 1: Quantity Consumed per Use-Day, by Consumer Type.</p>																																										
77																																											

Florida Medical Marijuana Program

Florida Low-THC, Medical Marijuana, and Smokable Medical Marijuana Patients by Year of First ID Approval as of September 30, 2019

Year ID First Approved	Active ID Cards
2016	554
2017	31,914
2018	96,390
2019	141,716
Total Active ID cards	270,574

Florida Low-THC, Medical Marijuana, and Smokable Medical Marijuana Patients by Age Group as of September 30, 2019

Age group	Active ID Cards
Less than 18	1,003
18 to 20	3,930
21 and over	265,641
Grand Total	270,574

Source: Tabulations by the Florida Legislature, Office of Economic and Demographic Research of data provided by the Department of Health, Office of Medical Marijuana Use, October 2019.

Florida Medical Marijuana Program
Transition of Medical Marijuana Patients to the Legal Retail Market

Florida Low-THC, Medical Marijuana, and Smokable Medical Marijuana Patients by

Age group	Active ID Cards
Less than 18	1,003
18 to 20	3,930
21 and over	265,641
Grand Total	270,574

Source: Tabulations by the Florida Legislature, Office of Economic and Demographic

1 Determine population 21 and over

Medical marijuana program patients with active IDs as of September 30, 2019	270,574
<i>Patients less than 21</i>	4,933
Medical marijuana program patients 21 years and over	265,641

2 Apply Colorado's percent decrease in medical marijuana patients to Florida

Colorado % decrease in medical marijuana users from 110,979 in 2013 to 88,417 in 2017	20.3%
Florida medical marijuana patients likely to transition to the legal retail market	54,005

Source: Colorado Department of Public Health and Environment, Medical Marijuana Registry Patient count, Average number of patients by year.

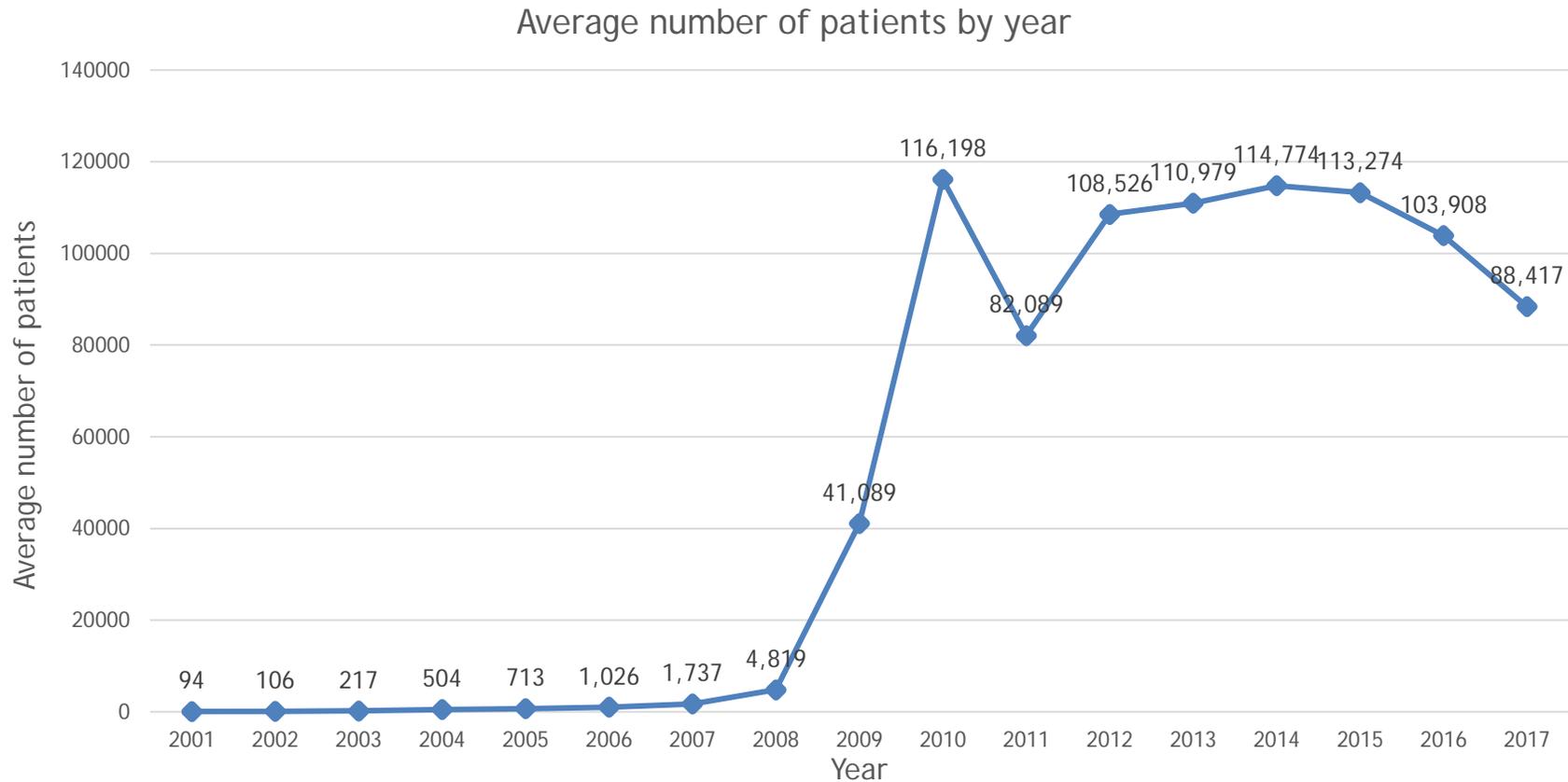
	Quantity Consumed per Use-Day, Grams of Flower per Use Day (Mean US)	Assumed use days per year (EDR assumption)	Cost per gram (\$/gram flower)⁶	Marijuana Retail Sales (\$)	State Sales Tax Collections (\$)
Florida medical marijuana patients likely to transition to the legal retail market					
54,005	1.6	365	10	315,389,200	18,923,352

Consumption (grams): 31,538,920



Medical Marijuana Registry

Patient count



2010 - Passage of HB 1284 and SB 10-109 establishing medical marijuana centers

2011 - Application processing backlog

Data collected by the Medical Marijuana Registry has evolved over the years. Additional data prior to 2009 is not available.



Proxies for New Florida Legal Retail Users of Marijuana

1. Marijuana first time users (2016-2017 count)	107,000
---	---------

Source: SAMHSA, Center for Behavioral Health Statistics and Quality, National Survey on Drug Use and Health, 2016 and 2017. Table 5. First Use of Marijuana, by Age Group and State: Average Annual Number of Marijuana Initiates (Expressed as Numbers in Thousands of the At-Risk Population), Based on 2016 and 2017 NSDUHs.

2. Estimate of Florida residents who turn 21 years of age each year	250,000
---	---------

Source: University of Florida, Bureau of Economic and Business Research, Florida Single Year of Age Population Projections, 2018 Estimate as Base.

3. Estimate of less than once a month users, assuming use each quarter	453,122
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Source: SAMHSA, Center for Behavioral Health Statistics and Quality, National Survey on Drug Use and Health, 2016 and 2017.



Colorado Travel Year 2018

Final Report

June, 2019

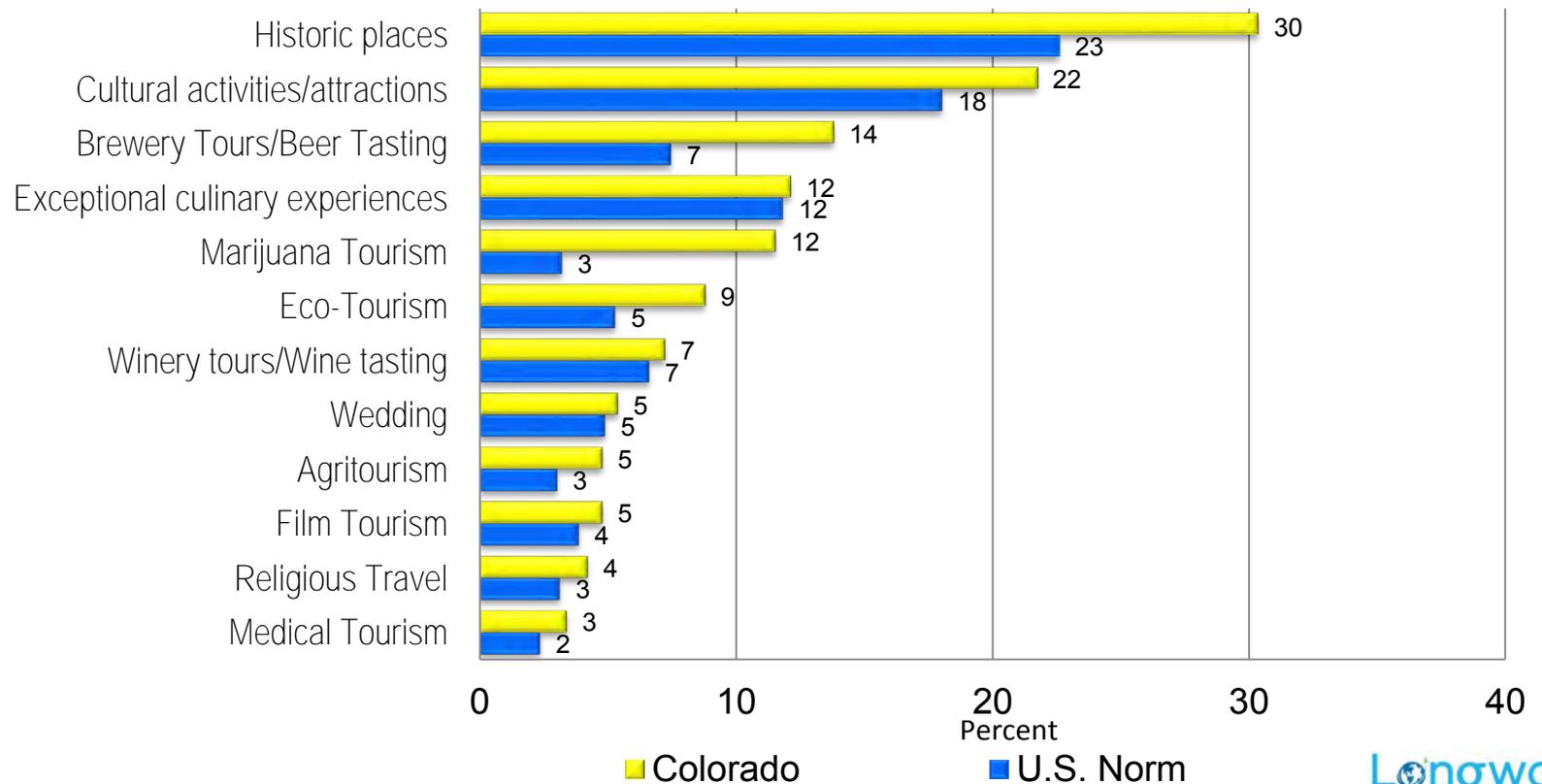


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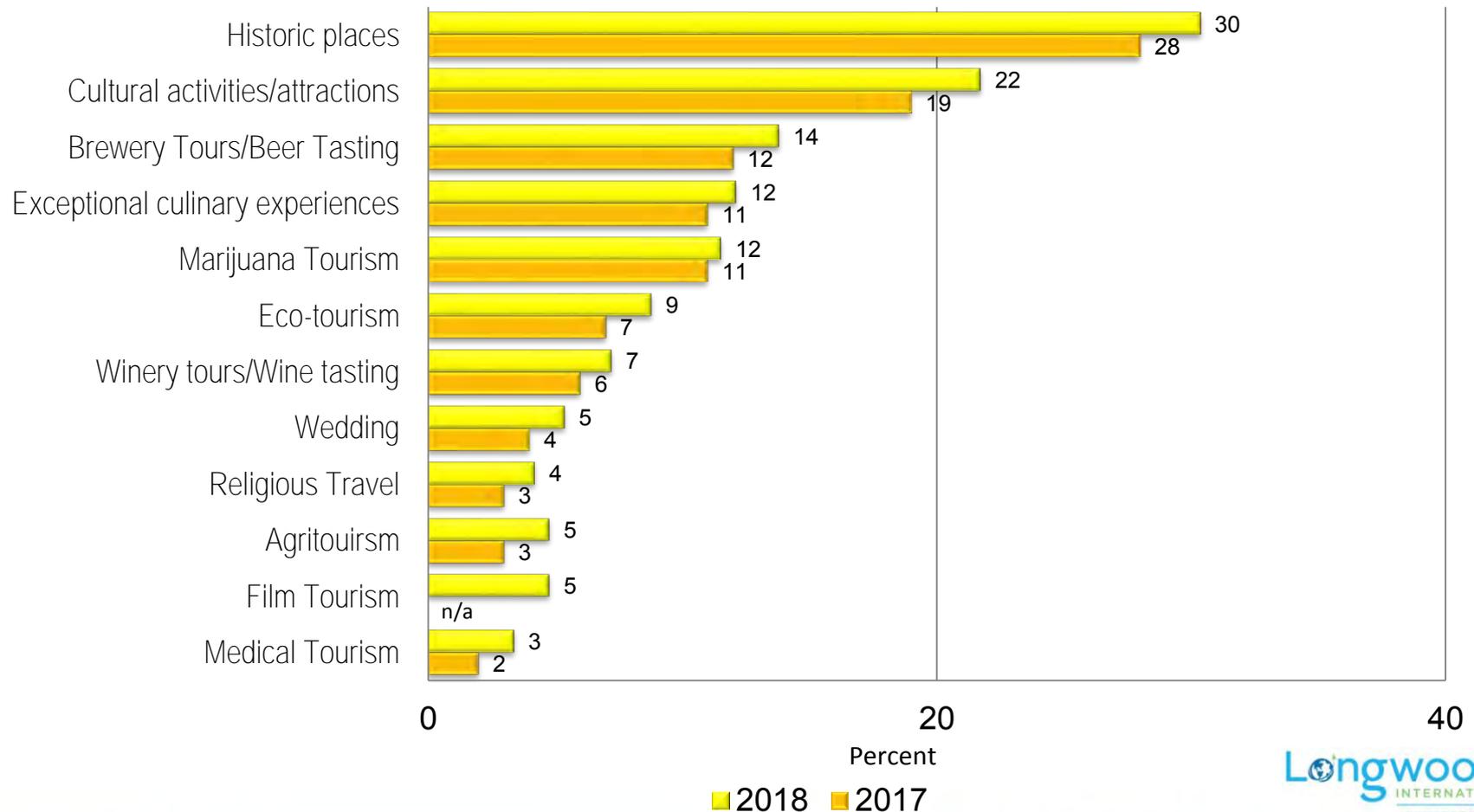
Specific Interests on Trip

Base: Overnight Leisure Trips



Specific Interests on Colorado Trip

Base: Overnight Leisure Trips



Attitudes on Legalization of Marijuana



How does the knowledge that some states have legalized the sale/use of marijuana affect how you view these states?

Base: Overnight Leisure Travelers

U.S. Norm

Consider buying goods/services made there

Consider living/working there

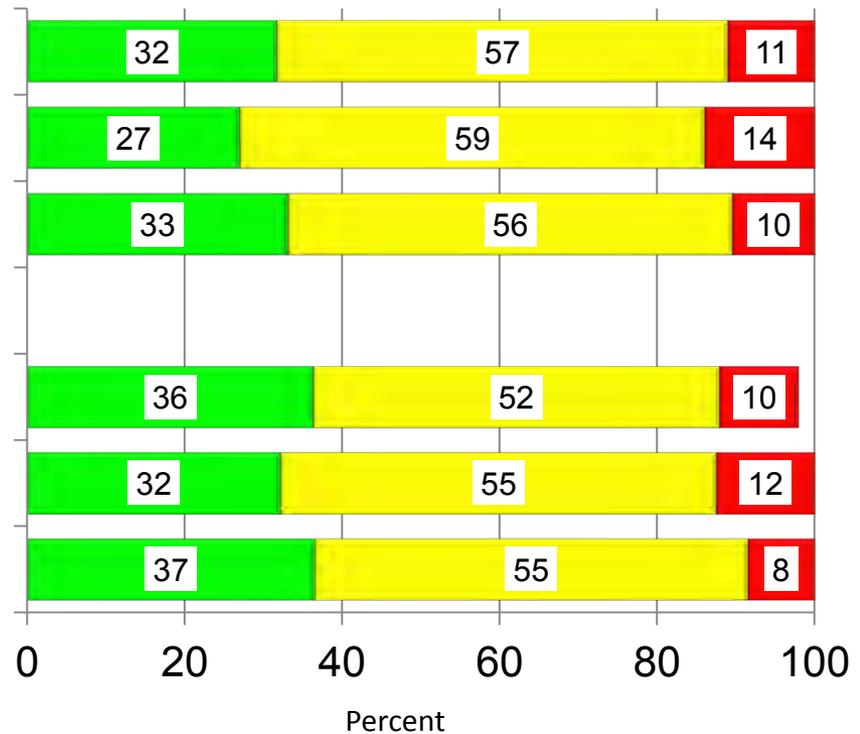
Consider visiting on a vacation

CO Leisure Visitors

Consider buying goods/services made there

Consider living/working there

Consider visiting on a vacation

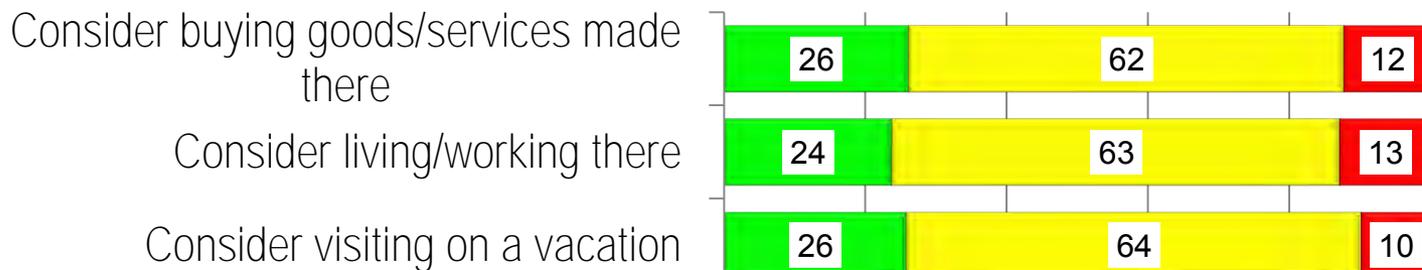


■ More Positive
 ■ Same
 ■ More Negative

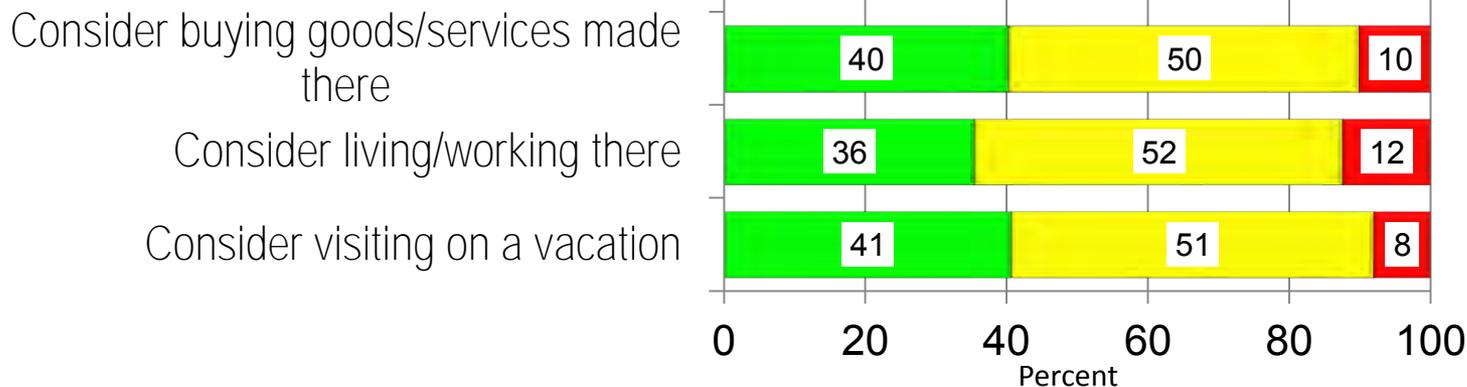
How does the knowledge that some states have legalized the sale/use of marijuana affect how you view these states?

Base: Overnight Leisure Travelers

CO Visitors – CO Residents



CO Visitors – Non-Residents



■ More Positive
 ■ Same
 ■ More Negative

Marijuana Usage

- Visiting a marijuana store/dispensary has returned to summer 2017 levels. While at its highest winter level to date, participation remains around the 15% mark.

Visiting a marijuana store or dispensary	Winter 2014	Summer 2014	Winter 2015	Summer 2015	Winter 2016	Summer 2016	Winter 2017	Summer 2017	Winter 2018	Summer 2018	Winter 2018-19
Participation	6%	8%	7%	8%	12%	14%	14%	17%	13%	15%	16%
Motivation	1%	2%	3%	7%	4%	4%	5%	7%	6%	6%	7%

- Nevertheless, seven in 10 winter visitors report that the availability of legal marijuana did not influence their decision to visit Colorado. This could be due to legalized marijuana becoming more widespread and mainstream throughout the country.

Impact of Marijuana Availability	Winter 2016	Summer 2016	Winter 2017	Summer 2017	Winter 2018	Summer 2018	Winter 2018-19
The availability of legal marijuana made me less interested in Colorado, but I came anyway	14%	8%	15%	13%	11%	12%	9%
The availability of legal marijuana had no influence in my decision to visit	64%	77%	64%	62%	65%	65%	70%
The availability of legal marijuana was one of many reasons I was interested in visiting Colorado	10%	7%	10%	7%	14%	14%	8%
The availability of legal marijuana made me somewhat more interested in visiting Colorado	8%	5%	8%	14%	9%	9%	10%
The only reason I visited Colorado was the availability of legal marijuana	5%	3%	3%	4%	2%	2%	3%

Colorado Marijuana Tourism Usage	
2018 Total Overnight Visitors:	33,900,000
Marijuana was the primary reason for visiting Colorado (Winter 2018)	3%
Estimate of Marijuana Tourists	1,017,000

Florida Visitor Expenditures	
Domestic Average Expenditures	\$159
Applicable Spending Subjected to State Sales Tax*	67%
State Sales Tax Rate	6%
Average Domestic Trip Duration	4.2

1st Estimate	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
Florida Total Visitor Estimates	128,514,100	134,183,900	139,438,400	144,760,300	150,224,800
Marijuana Tourism Rate	3%	3%	3%	3%	3%
New Marijuana Tourists	3,855,423	4,025,517	4,183,152	4,342,809	4,506,744
Total Expenditure Per Trip (Average Expenditures x Trip Duration)	\$2,573,032,202	\$2,686,549,535	\$2,791,751,982	\$2,898,303,870	\$3,007,710,811
Total Expenditures Subjected to Sales Tax	\$1,723,931,575	\$1,799,988,189	\$1,870,473,828	\$1,941,863,593	\$2,015,166,243
Total State Sales Tax Collected	\$103,435,895	\$107,999,291	\$112,228,430	\$116,511,816	\$120,909,975

2nd Estimate	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
Florida Total Visitor Estimates	128,514,100	134,183,900	139,438,400	144,760,300	150,224,800
Marijuana Tourism Levels	1,017,000				
New Marijuana Tourists	1,017,000	1,061,868	1,103,450	1,145,565	1,188,808
Total Expenditure Per Trip (Average Expenditures x Trip Duration)	\$678,725,460	\$708,669,549	\$736,420,301	\$764,527,015	\$793,386,846
Total Expenditures Subjected to Sales Tax	\$454,746,058	\$474,808,598	\$493,401,602	\$512,233,100	\$531,569,187
Total State Sales Tax Collected	\$27,284,763	\$28,488,516	\$29,604,096	\$30,733,986	\$31,894,151

3rd Estimate	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
Florida Total Visitor Estimates	128,514,100	134,183,900	139,438,400	144,760,300	150,224,800
Medical Tourism**	0.246%				
New Medical Marijuana Tourists	316,145	330,092	343,018	356,110	369,553
Total Expenditure Per Trip (Average Expenditures x Trip Duration)	\$210,988,641	\$220,297,062	\$228,923,663	\$237,660,917	\$246,632,286
Total Expenditures Subjected to Sales Tax	\$141,362,389	\$147,599,031	\$153,378,854	\$159,232,815	\$165,243,632
Total State Sales Tax Collected	\$8,481,743	\$8,855,942	\$9,202,731	\$9,553,969	\$9,914,618

* Based-on Internal EDR study

** 2018 Visit Florida Purpose of Stay Estimate