

**B2B**

International

A Merkle Company

# Understanding Cannabis In The Workplace

A Report For The National Safety Council

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July 21, 2021

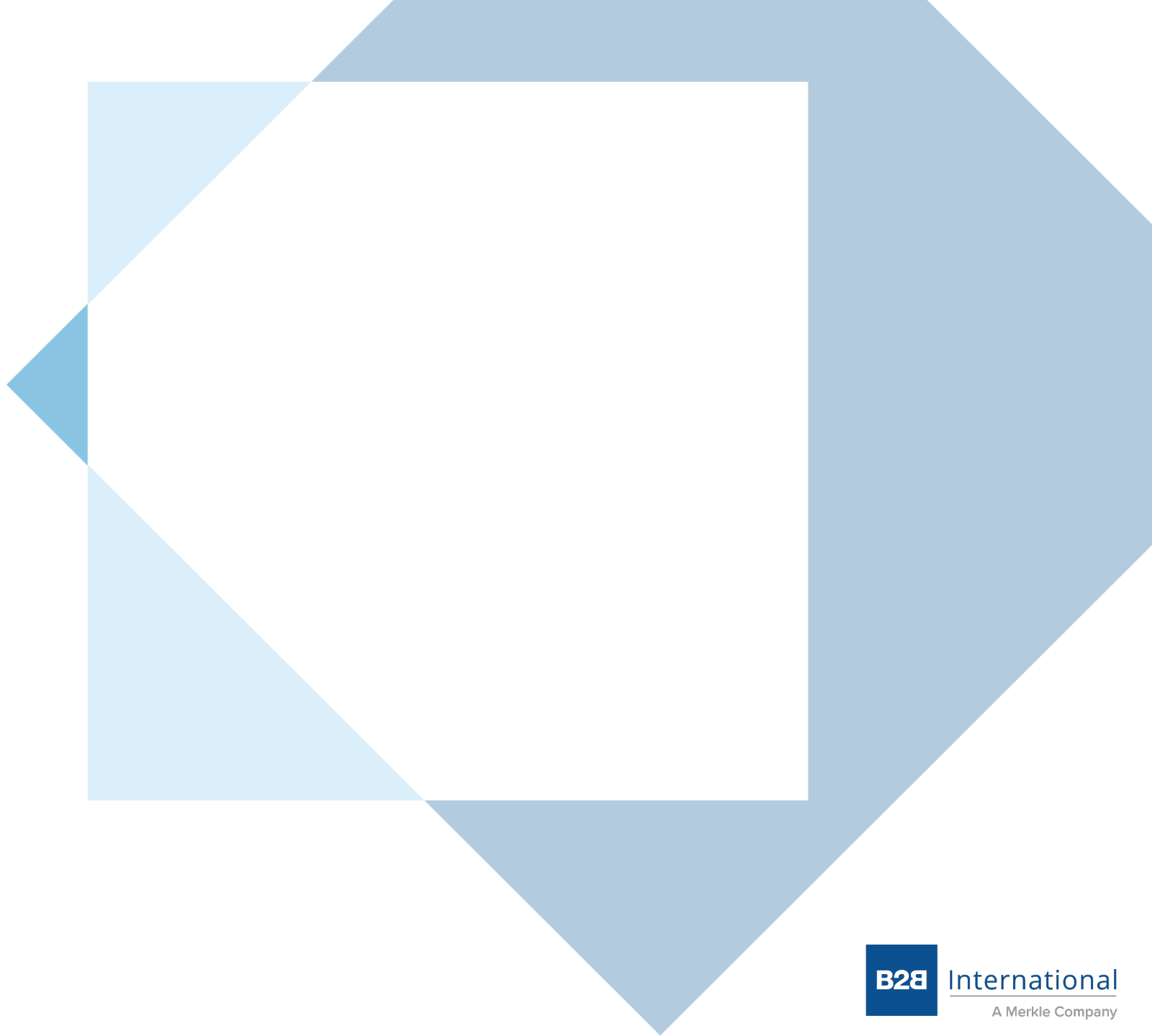


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## Research Objectives & Respondent Profile



# Key Terms (As Defined At The Beginning Of The Survey)



**Cannabis** – A plant in which the flowers are dried or harvested to produce marijuana, a psychoactive (mind-altering) drug that is smoked or consumed. Cannabis is commonly referred to as marijuana.



**Legalization Of Cannabis** – Across the United States, laws vary by state on whether cannabis is legal for medical use only, legal for both medical and recreational use, or is currently illegal in all forms.



**Medical Cannabis** – Cannabis that is recommended by a healthcare provider to treat a specific condition or for pain management.



**CBD Products** – Products made from cannabis that may or may not contain THC (THC is the main psychoactive ingredient in cannabis). Examples are CBD gummies, CBD oil, and CBD lotion.



**Recreational Cannabis** – Usage of cannabis for personal enjoyment – legally or illegally without a prescription – rather than for health purposes.



**Illicit** – A substance that is obtained or used illegally.

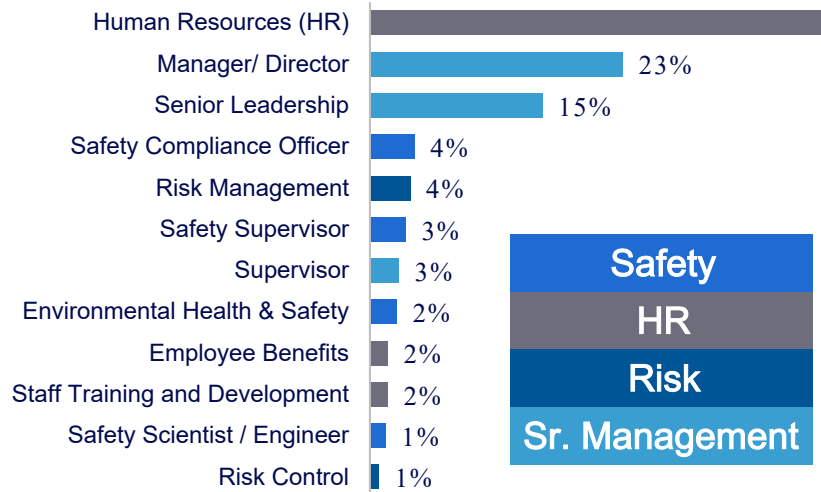


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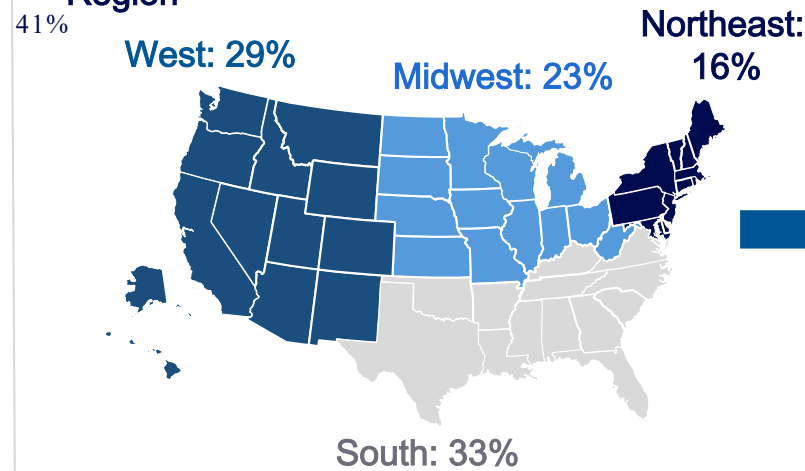
Employers Surveyed

# Profiling Employers Firmographics & Demographics

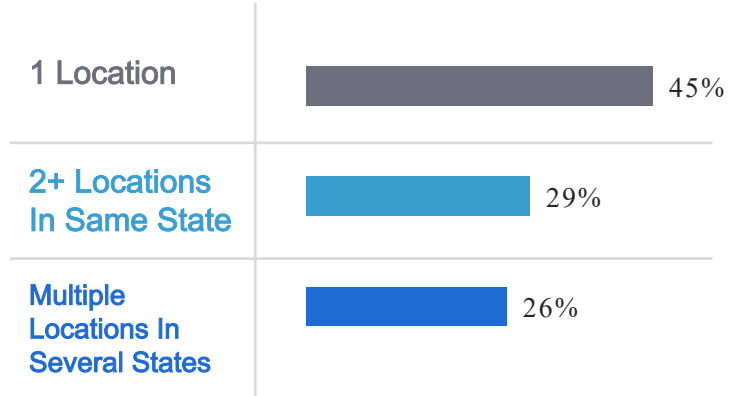
## Job Role



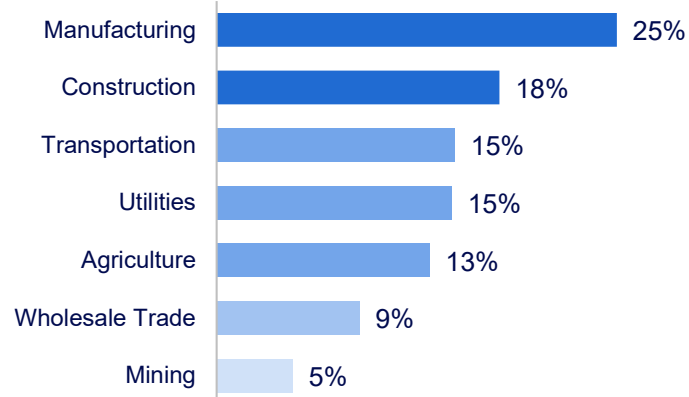
## Region



## Number of Locations



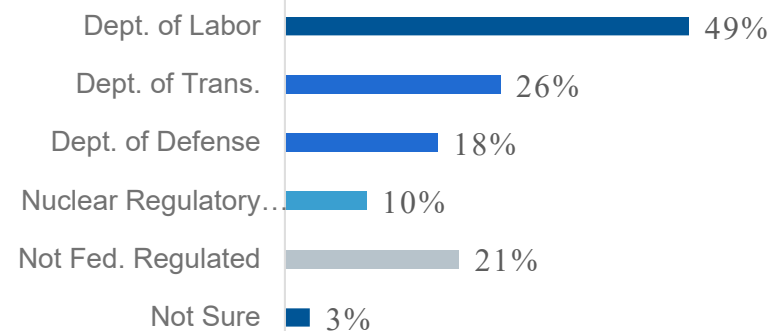
## Industry



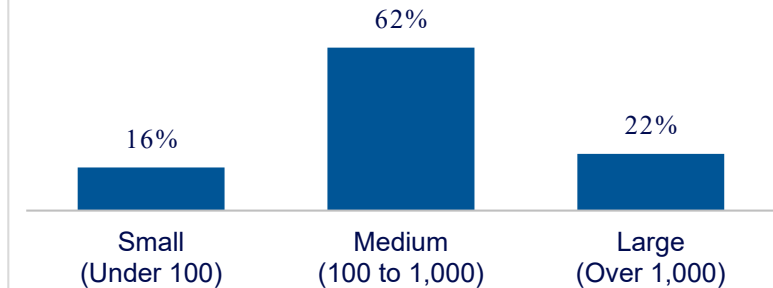
## Regulation



Federally Regulated 76%



## Number of Employees





1,000

Employees Surveyed

# Profiling Employees Firmographics

## Safety Focus

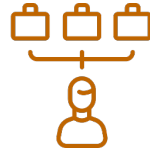


**Safety Sensitive Position**  
64%



**Non-Safety Sensitive Position**  
36%

## Work More Than One Job



**Yes**  
14%



**No**  
86%

## Drive Company Vehicle

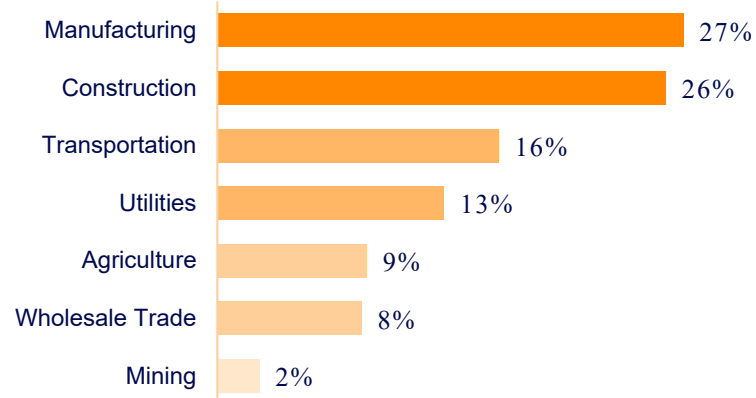


**Yes**  
43%

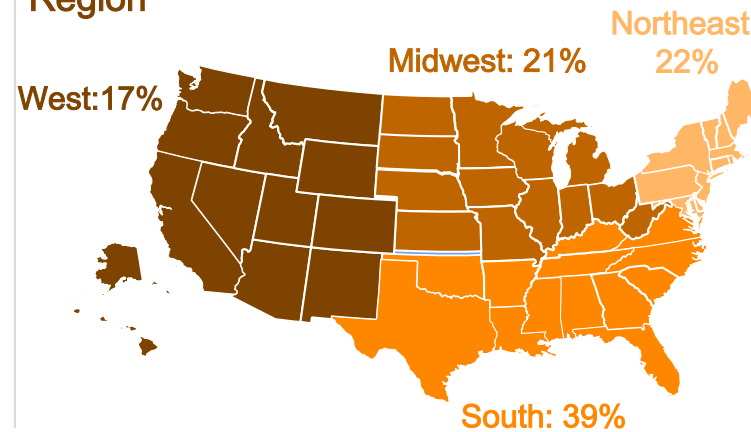


**No**  
57%

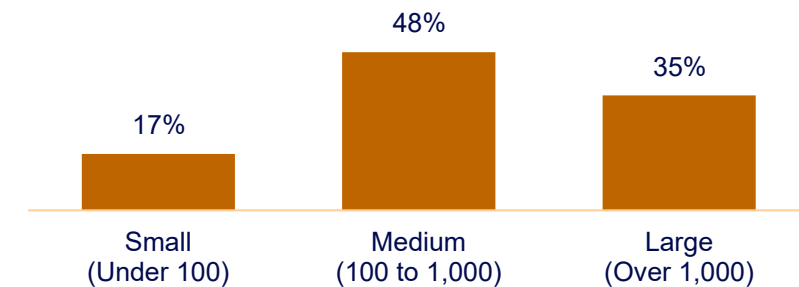
## Industry



## Region



## Number of Employees



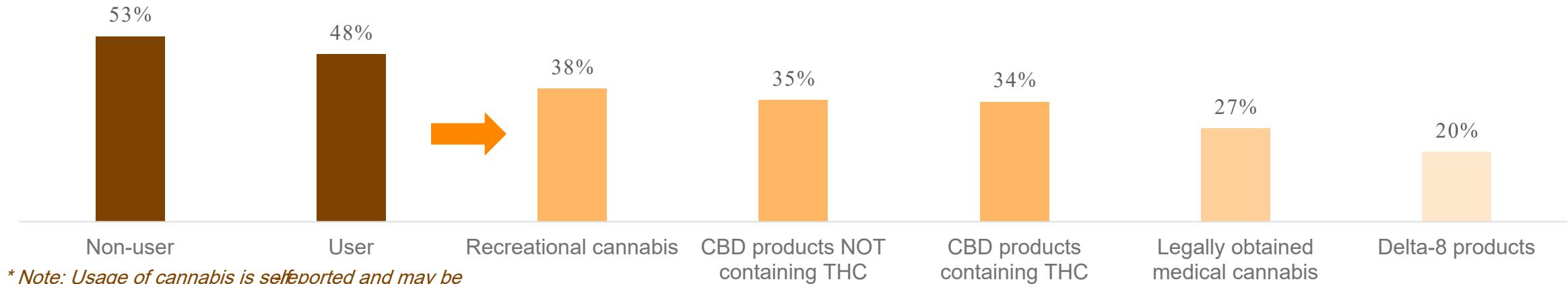


1,000

Employees Surveyed

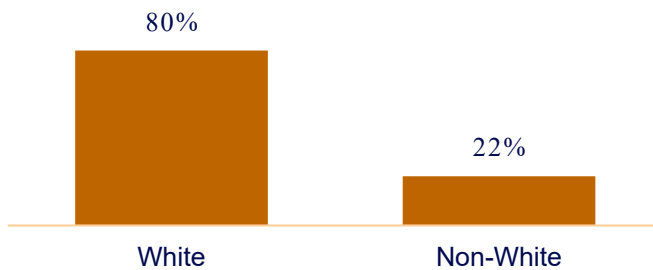
# Profiling Employees Demographics

## Cannabis User\*



\* Note: Usage of cannabis is self-reported and may be over or understated. Interpret with caution.

## Ethnicity



Note: Respondents Could Select Multiple Ethnicities

## Gender



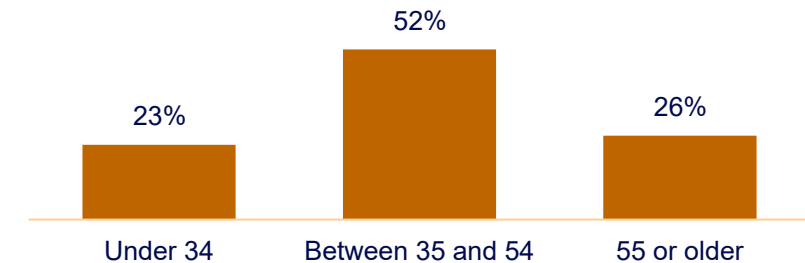
Male  
69%



Female  
30%

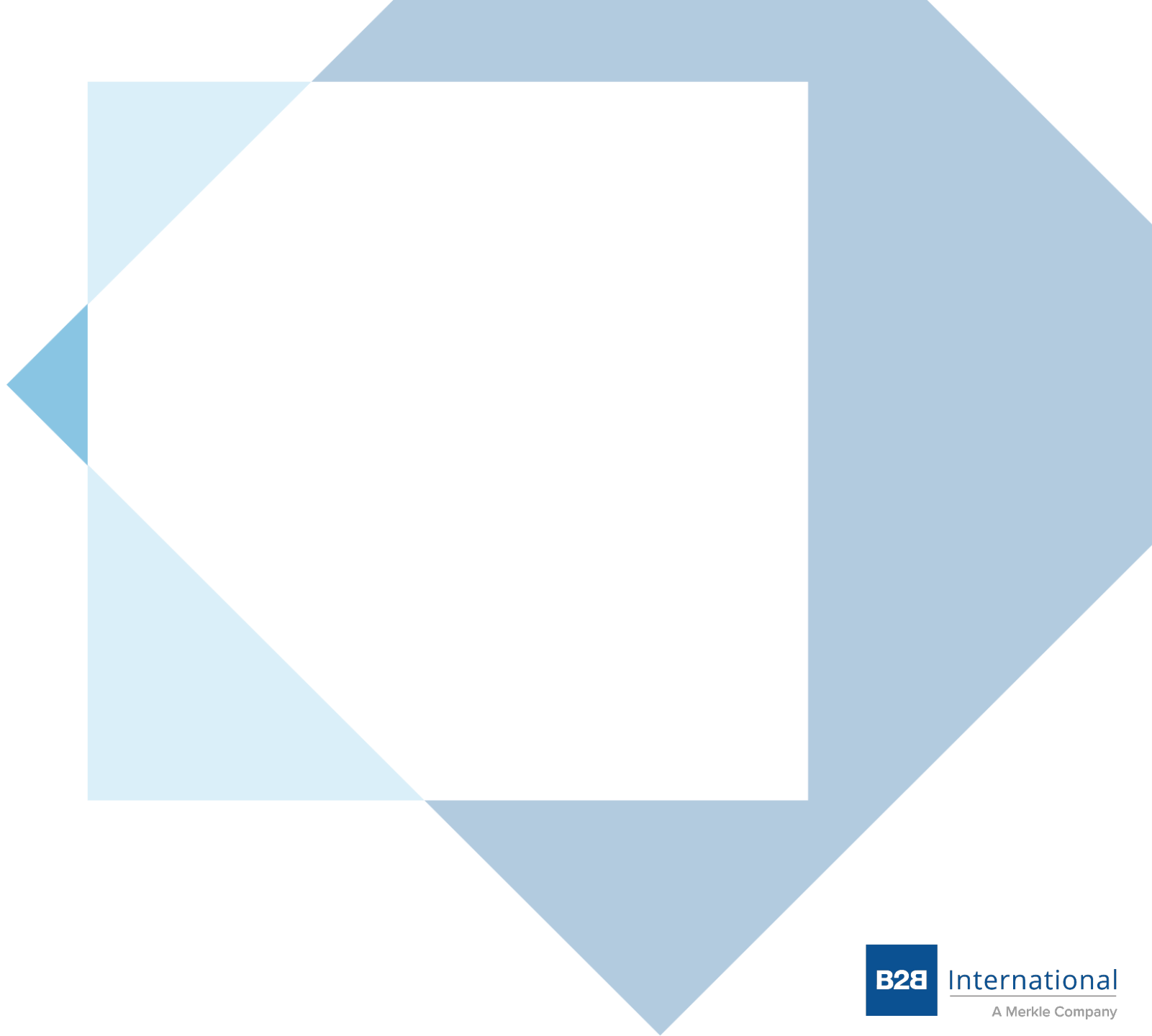
Note: 1% Selected Other Response

## Age





## Awareness & Concerns Around Cannabis & CBD Products

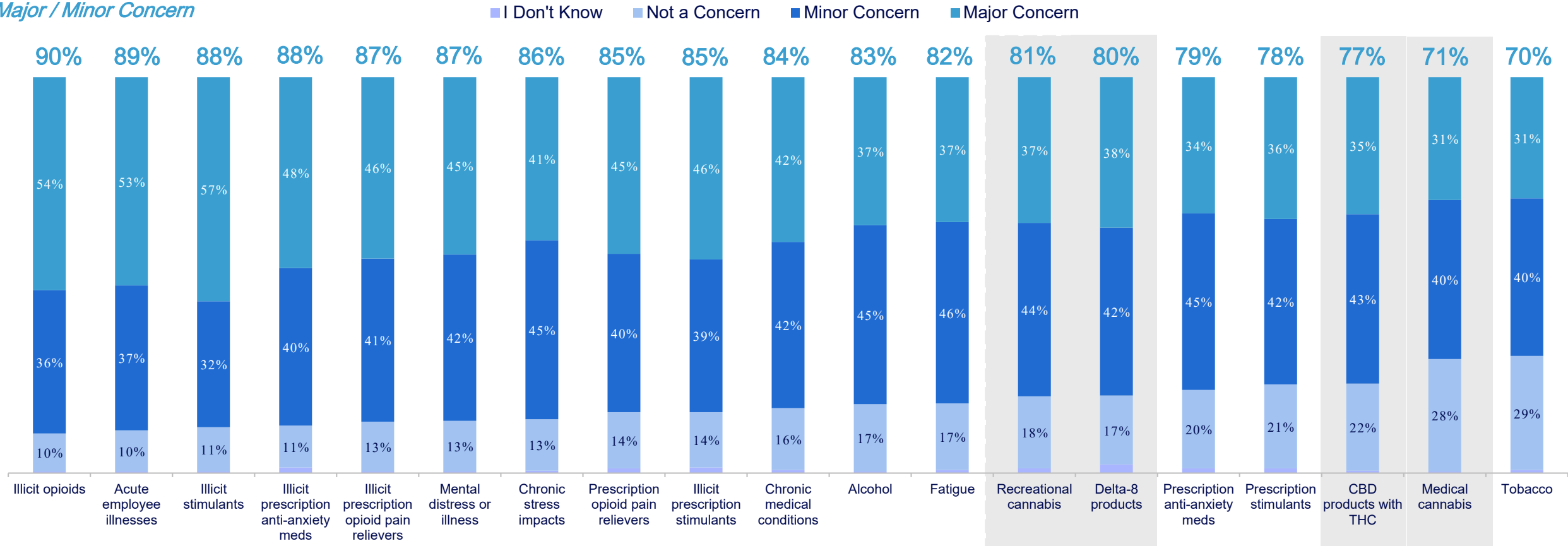




# Around 8 Out Of 10 Employers Are Concerned About Recreational Cannabis, Delta-8 And CBD Products; Medical Cannabis Perceived As Less Of A Concern

Over half of employers identify illicit opioids, acute employee illnesses and illicit stimulants as major concerns. Cannabis (in any form) is only identified by around one-third of employers as a primary concern. Concerns about recreational cannabis and Delta-8 products are in line with fatigue and alcohol.

## Major / Minor Concern



# Employers In States Where Medical Marijuana Has Been Legalized Are More Concerned About The Negative Impacts Of Cannabis; Exception For Recreational Usage

Significantly higher
Significantly lower  
**Bold = notably higher**

*Major / Minor Concern*

	Overall	Medicinally Legal		Job Role				Number of Employees		
		Legal	Illegal / Restricted	HR	Sr. Mgmt.	Safety	Risk	Small	Medium	Large
	500	385	115	220	203	55	22*	82	310	108
Illicit opioids	90%	90%	91%	95%	84%	93%	91%	89%	93%	83%
Acute employee illnesses	89%	90%	85%	92%	85%	93%	91%	90%	92%	81%
Illicit stimulants	88%	90%	83%	94%	82%	85%	85%	85%	92%	80%
Illicit prescription anti -anxiety medications	88%	89%	86%	94%	78%	95%	100%	84%	92%	81%
Illicit prescription opioid pain relievers	87%	88%	85%	92%	81%	87%	95%	87%	91%	77%
Mental distress or illness	87%	87%	86%	94%	78%	87%	100%	85%	89%	81%
Chronic stress impacts	86%	87%	85%	92%	78%	91%	91%	89%	89%	76%
Prescription opioid pain relievers	85%	86%	80%	94%	70%	95%	95%	88%	87%	74%
Illicit prescription stimulants	85%	85%	83%	90%	75%	93%	95%	84%	89%	72%
Chronic medical conditions	84%	85%	79%	91%	71%	95%	95%	77%	87%	80%
Alcohol	83%	84%	77%	90%	74%	82%	86%	88%	86%	69%
Fatigue	82%	83%	79%	89%	73%	91%	86%	90%	82%	78%
<b>Recreational cannabis</b>	81%	81%	80%	86%	70%	93%	91%	<b>80%</b>	<b>83%</b>	73%
<b>Delta-8 products</b>	80%	<b>82%</b>	75%	88%	71%	80%	95%	77%	84%	72%
Prescription anti -anxiety medications	79%	79%	77%	87%	65%	93%	95%	80%	82%	69%
Prescription stimulants	78%	81%	68%	87%	64%	85%	91%	85%	81%	62%
<b>CBD products containing THC</b>	77%	81%	64%	85%	66%	87%	86%	76%	84%	60%
<b>Medical cannabis</b>	71%	<b>74%</b>	62%	82%	54%	87%	82%	73%	75%	59%
Tobacco	70%	72%	66%	75%	60%	84%	82%	76%	74%	57%

\*No statistical differences with recreationally legal states.

\* Caution Low Base

Q9. How concerned are you about each of the following substances or conditions having a negative impact on your workforce?

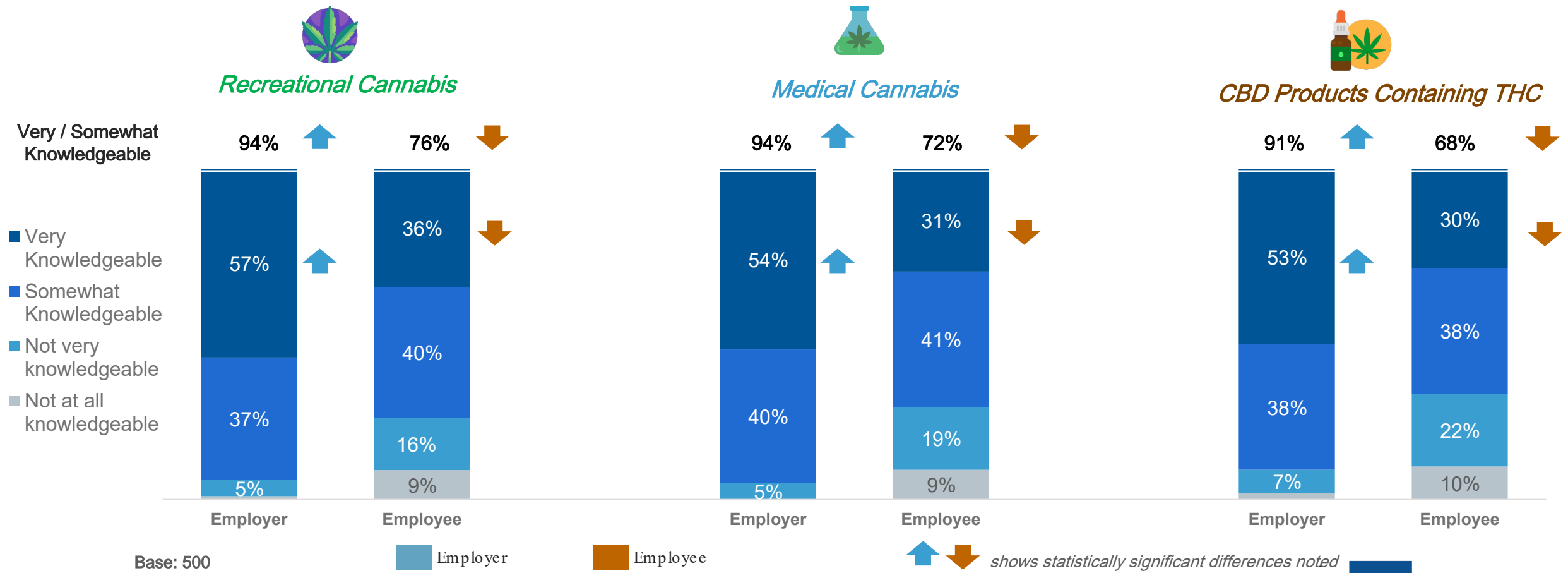
Significantly higher
Significantly lower

Base: Varies

By Medicinally Legal, Role, Company Size

# Employers Feel More Knowledgeable Than Employees About The Impact Of Cannabis On Workplace Safety

Over half of employers feel very knowledgeable about the impact of each substance on workplace safety, while only approximately one-third of employees share the same sentiment. Knowledge of the impact of CBD products containing THC on safety is slightly lower than other substances for both groups.

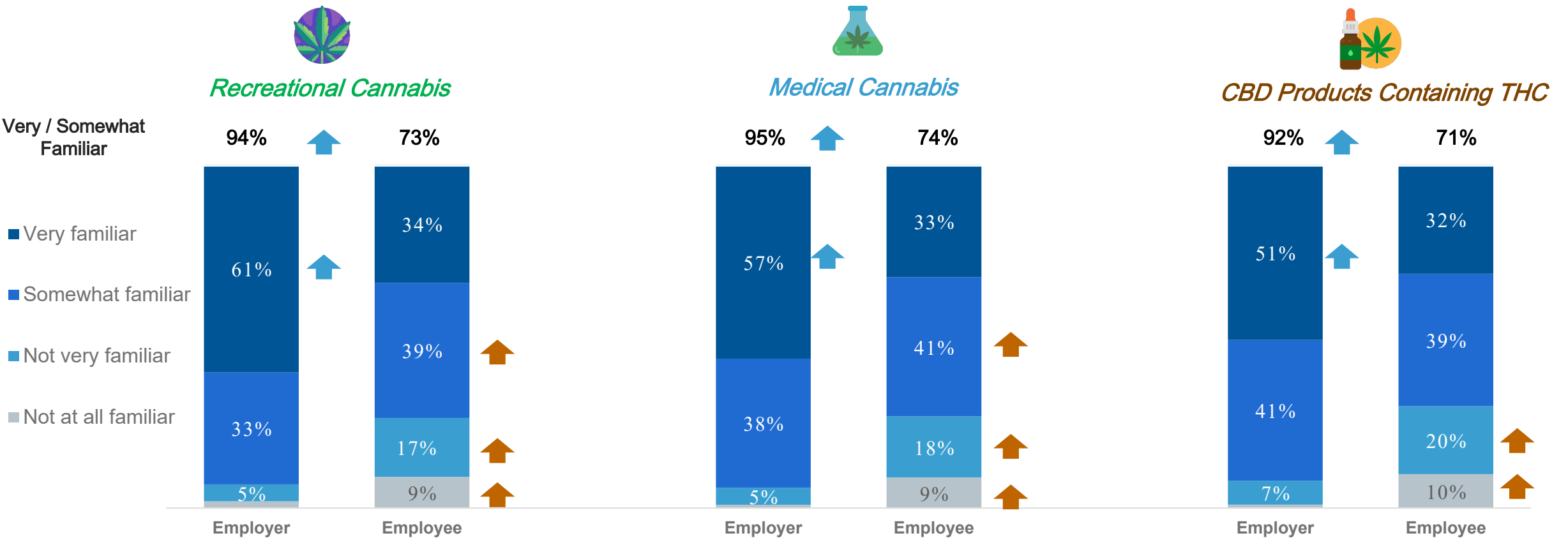


Base: 500  
All Employers  
Base: 1,000  
All Employees

Q10. How knowledgeable would you say you are personally when it comes to each of the following substances and their impact on workplace safety? [Employers] / Q11. How knowledgeable would you say you are personally when it comes to each of the following substances and their impact on workplace safety? [Employees]

# Unsurprisingly, Employers Are More Familiar Than Employees When It Comes To Laws Around Cannabis

Employees are most likely to describe themselves as somewhat familiar with the changes to laws in their state, while over half of employers are very familiar. Employers are more familiar with the laws around recreational and medical cannabis compared to laws around CBD products containing THC.

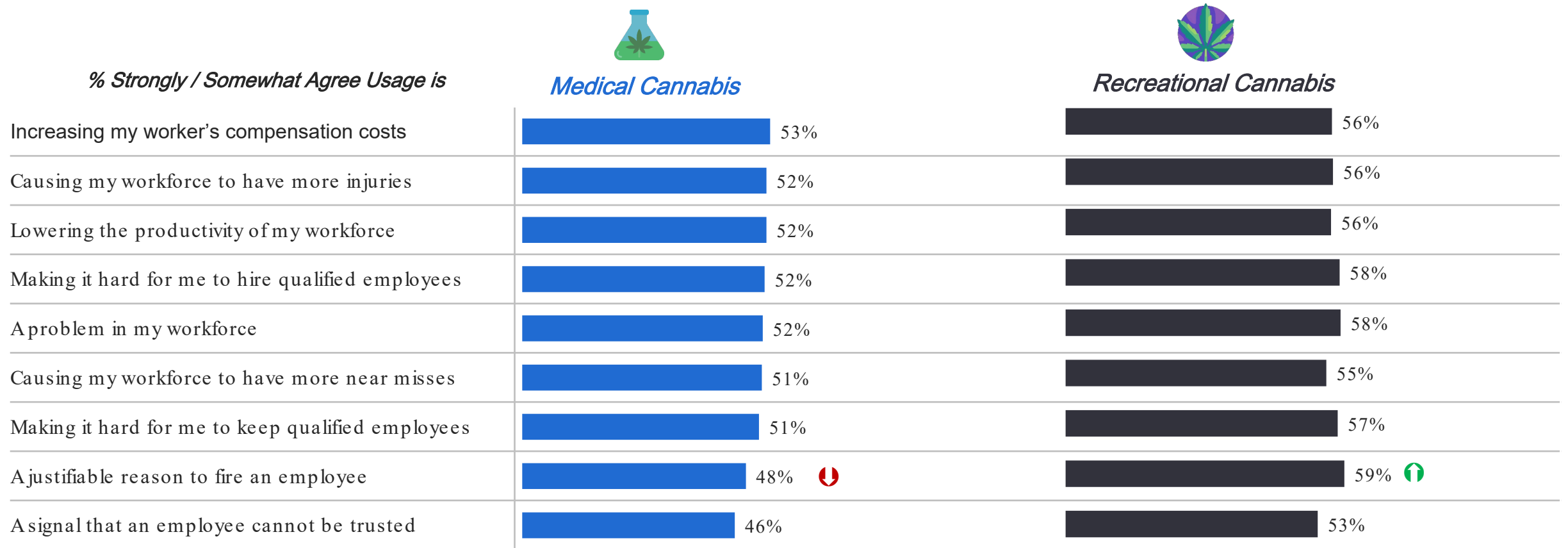


Base: 500  
All Employers  
Base: 1,000  
All Employees

1. How familiar are you with changes to the laws in your state related to the legalization of [INSERT STATEMENT], including where it is allowed to be consumed? [Employers] / Q12. How familiar are you with changes to the laws in your state related to the legalization of [INSERT STATEMENT], including where it is allowed to be consumed? [Employees]

# Directionally, Employers Perceive Usage Of Recreational Cannabis As Slightly More Likely To Cause Impacts In The Workplace

Employers are significantly more likely to perceive usage of recreational cannabis as a reason to fire an employee.



  shows statistically significant differences noted

# Employers Are Most Likely To Attribute Usage Of Cannabis To Mistakes On The Job And Increased Absenteeism

Employers working for organizations that are federally regulated are significantly more likely to attribute accidents and injuries to the usage of cannabis than non-regulated organizations. Small organizations are significantly more likely not to perceive any impact to the usage of cannabis. Senior management, likely farther removed from the issue than other roles, is significantly more likely to not identify any workplace impacts due to cannabis.

% Attributed To Cannabis	Overall	Federal Agency Oversight		Number of Employees			Job Role			
		Federally Regulated	No Federal Regulation	Small	Medium	Large	HR	Sr. Mgmt.	Safety	Risk
	500	378	105	82	310	108	220	203	55	22*
Errors or mistakes on the job	42%	43%	42%	28%	<b>46%</b>	<b>43%</b>	43%	35%	62%	55%
Increased absenteeism	38%	39%	34%	26%	39%	<b>44%</b>	37%	35%	53%	41%
Decreased productivity	35%	37%	30%	<b>26%</b>	40%	<b>28%</b>	37%	28%	49%	45%
Workplace injury	32%	36%	18%	33%	34%	25%	35%	23%	44%	45%
Heavy equipment crashes	31%	37%	15%	22%	34%	32%	33%	24%	51%	41%
None of the above	19%	13%	36%	35%	13%	24%	13%	32%	7%	0%

**Bold** = notably higher / Lower

  Significantly higher

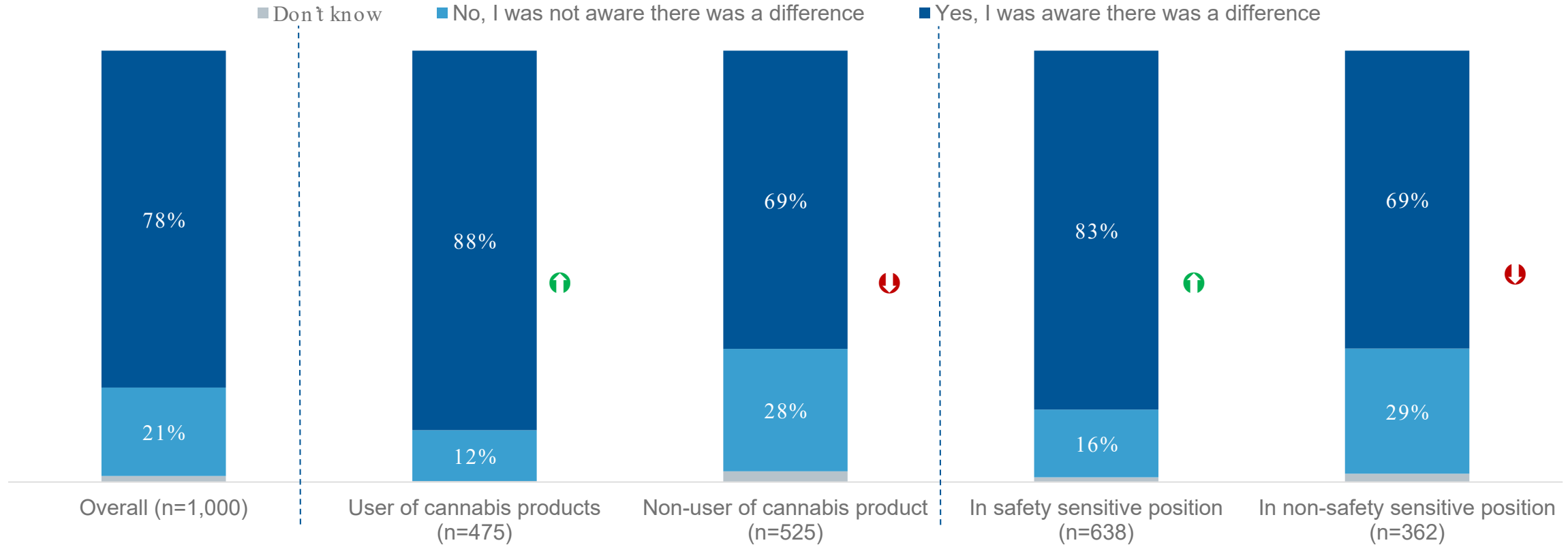
  Significantly lower

\* Caution Low Base

# Nearly 8 In 10 Employees Are Aware CBD Products Can Contain Or Lack THC

Those who use at least one type of cannabis product have a greater awareness of THC than non-users. Similarly, those in safety sensitive positions are more aware of THC than those in non-safety sensitive positions.

## Awareness Of THC



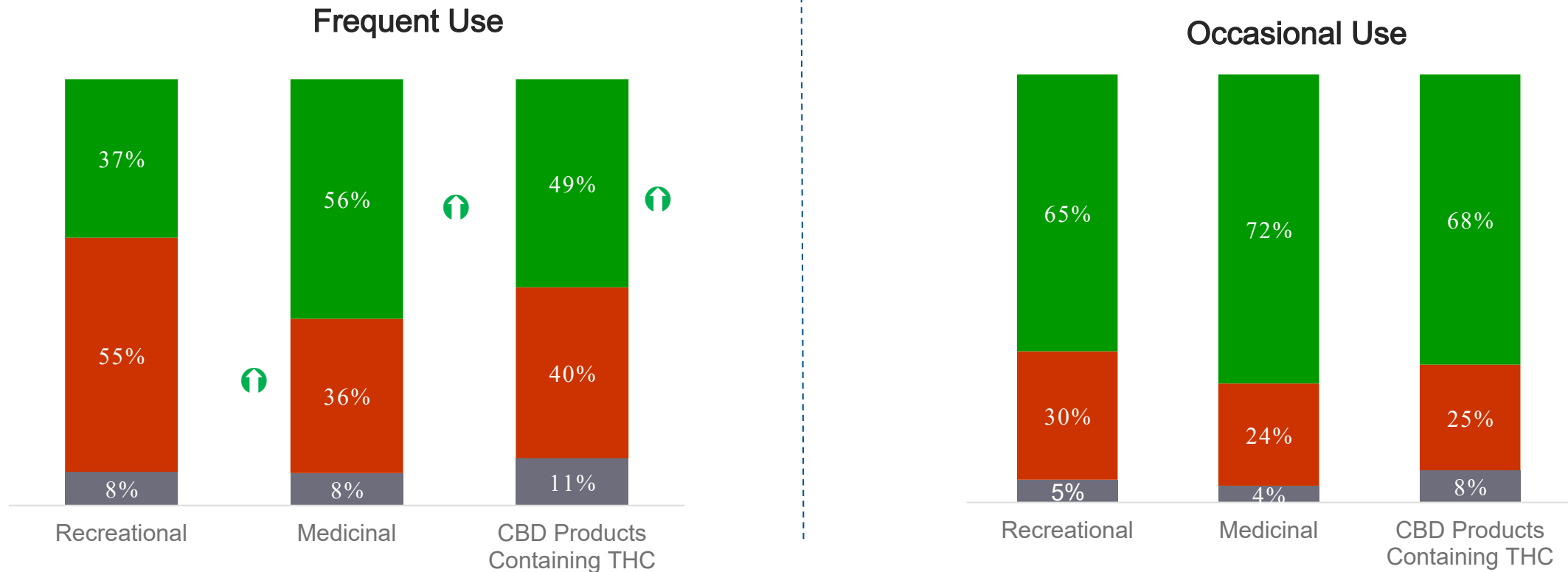
Base: Varies  
By Users Of Cannabis Products, Safety Sensitive Position

Q10. Prior to taking this survey, were you aware that CBD products can either contain THC or lack THC? THC is the main active ingredient in cannabis and is responsible for getting people high or cause impairment.

↑ ↓ shows statistically significant differences noted

# Only About One-Third Of Employees Perceive Occasional Use Of Cannabis As Not Acceptable

Employees are significantly more likely to perceive frequent use of medicinal cannabis and CBD products containing THC as acceptable when compared to recreational use.



■ Don't Know ■ Not Acceptable ■ Acceptable

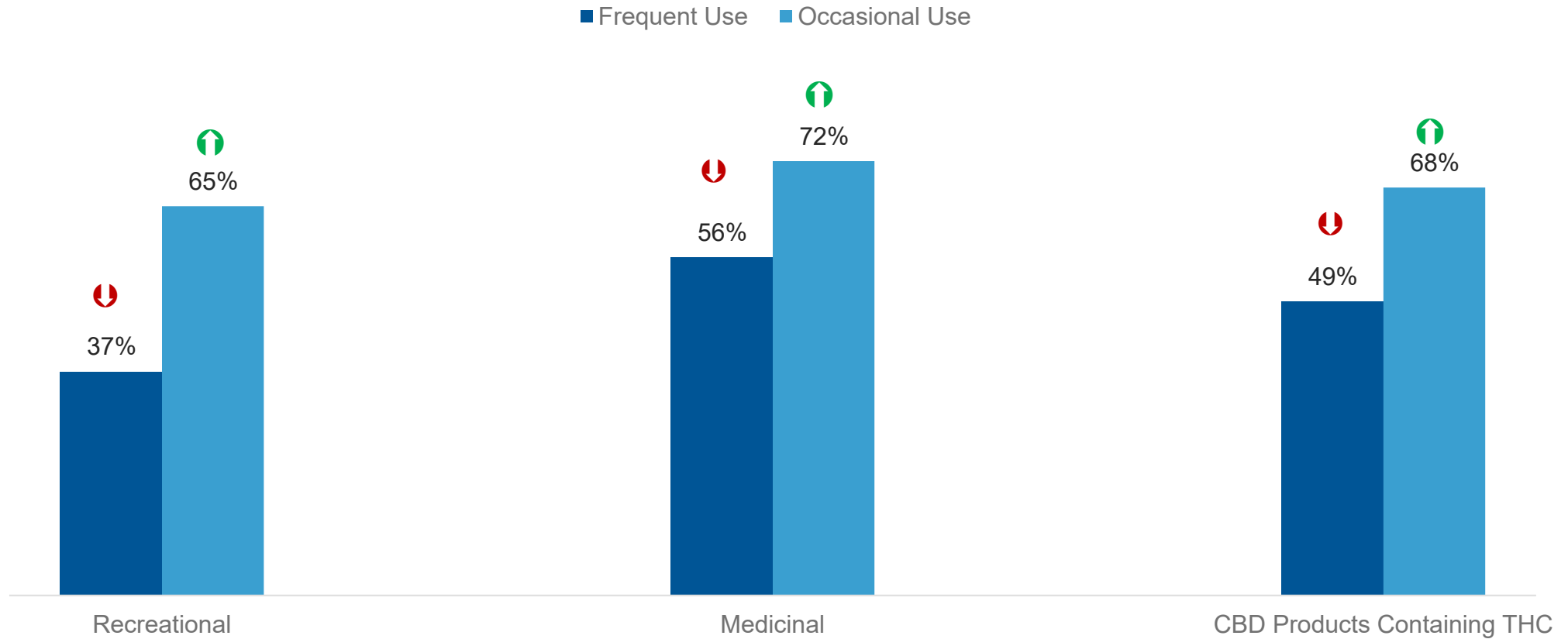
↑ ↓ shows statistically significant differences noted

Q13. Do you view usage of [INSERT STATEMENT], as acceptable ...



# Frequent Use Of Cannabis Products Seen As Less Acceptable Overall

Employees are significantly more likely to perceive occasional use of cannabis and CBD products containing THC as acceptable.



  shows statistically significant differences noted

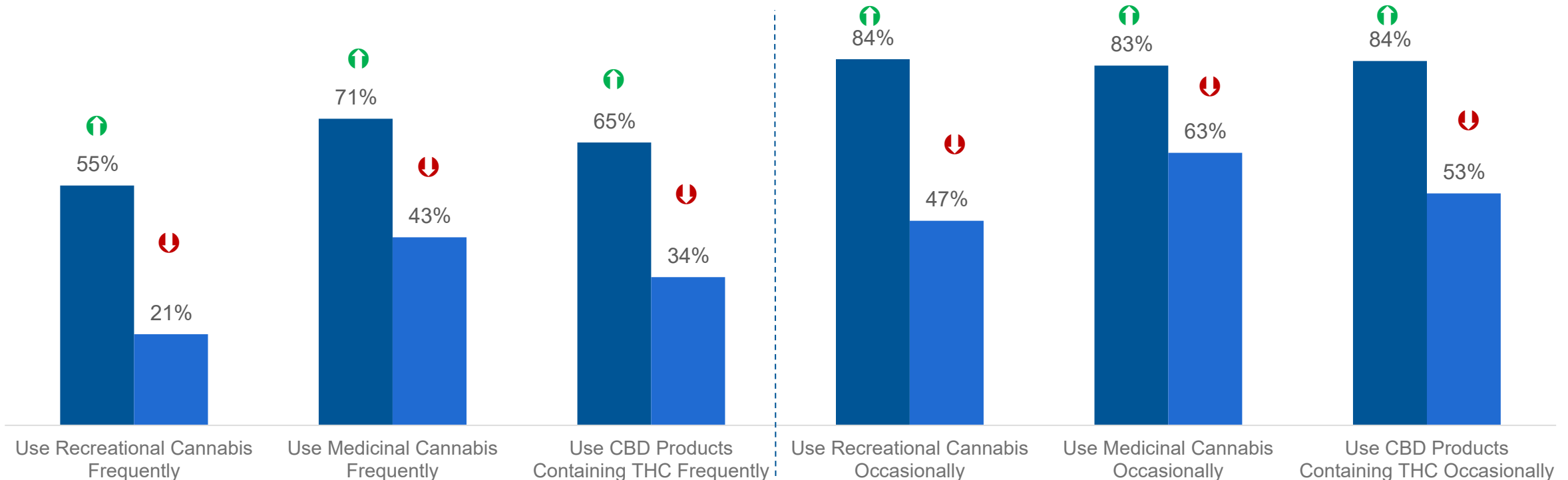
Q13. Do you view usage of [INSERT STATEMENT], as acceptable ...

# Users Of Cannabis Products Perceive Cannabis Usage As More Acceptable Overall

Current users of cannabis products see cannabis as more acceptable significantly more than non-users, even when use is occasional.

## % Reporting Usage As Acceptable

■ Cannabis User ■ Cannabis Non-User



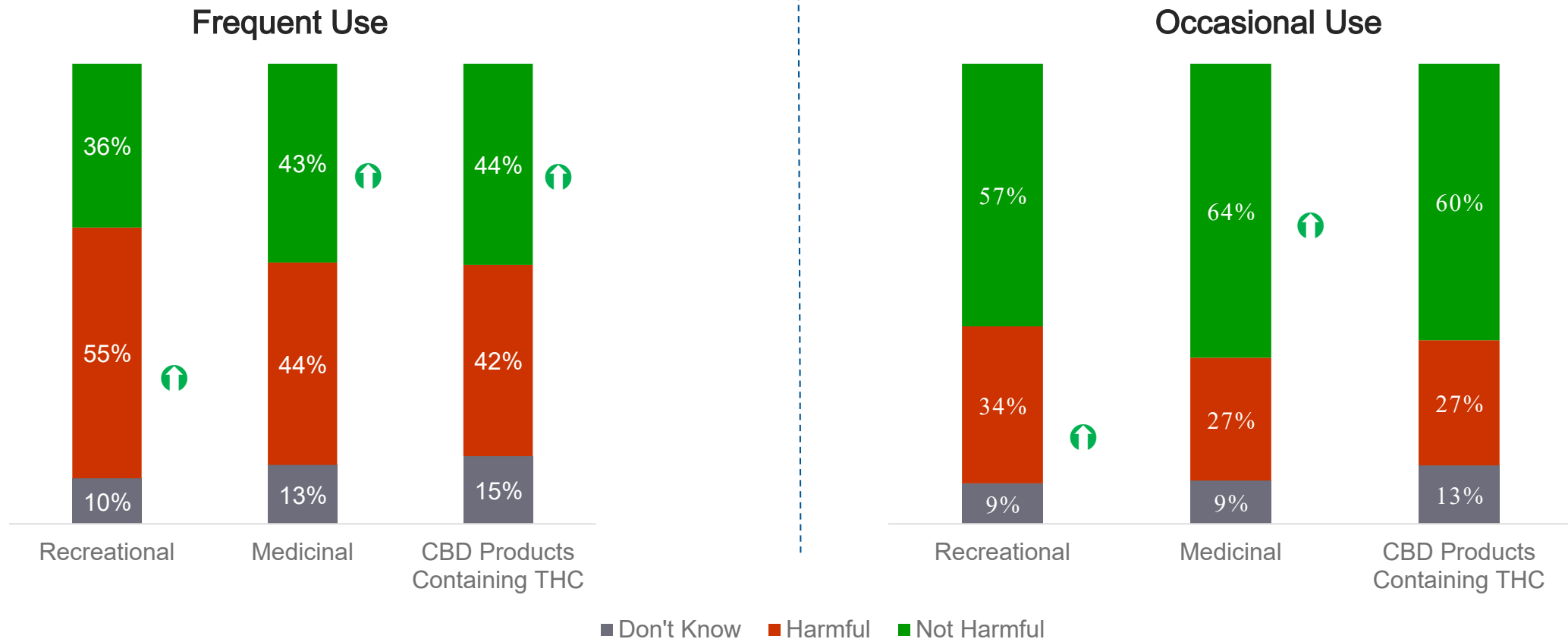
↑ ↓ shows statistically significant differences noted

Base: 1,000  
All Employees

Q13. Do you view usage of [INSERT STATEMENT], as acceptable ...

# Frequent Use Of Recreational Cannabis Is Seen As More Harmful To One's Health Than Other Cannabis Substances

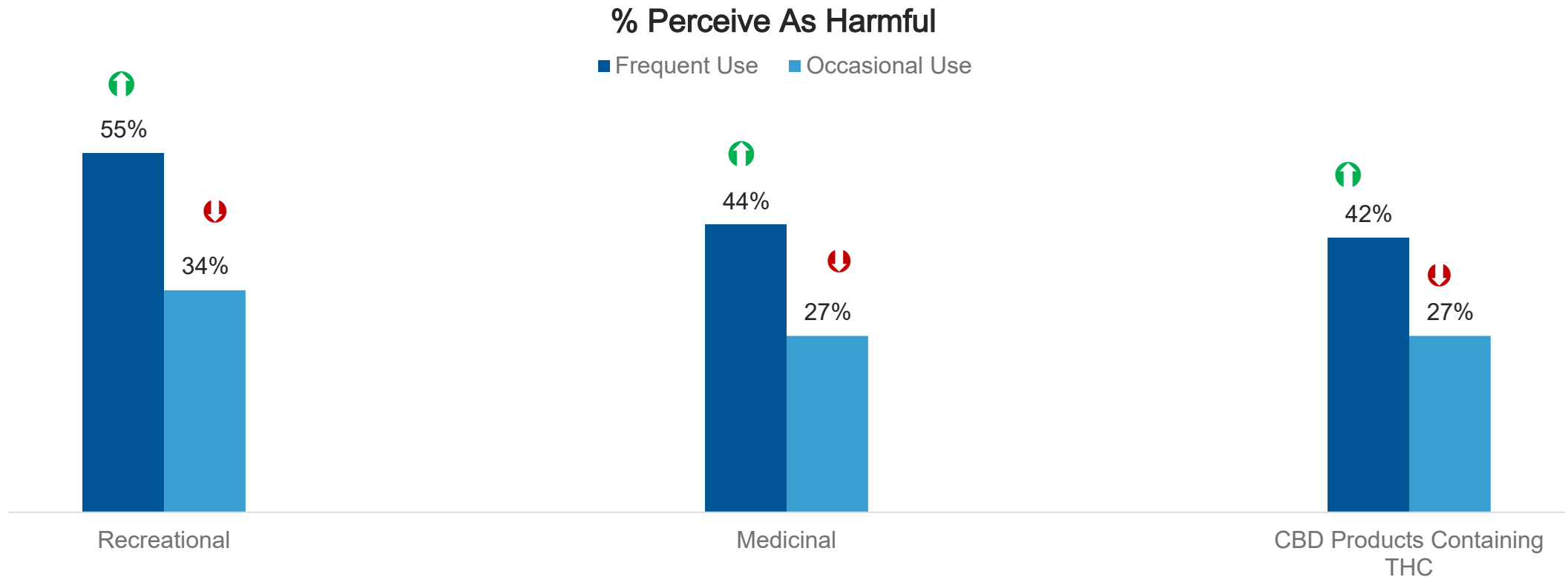
Employees are significantly more likely to perceive occasional use of medical cannabis as not harmful. When medicinal cannabis is used according to HCP recommendations, only about a quarter of employees perceive it to be harmful.



↑ ↓ shows statistically significant differences noted

# Frequent Use Of Cannabis Is Seen As More Harmful To One's Health Compared To Occasional Usage, Regardless Of Cannabis Type

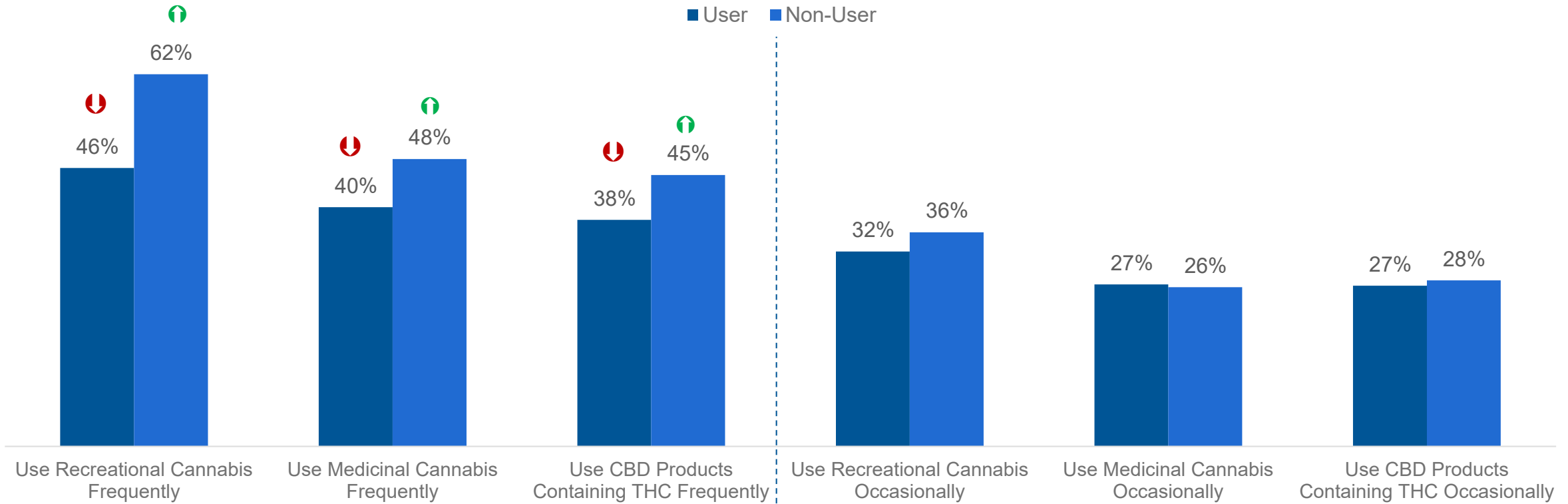
When used occasionally, CBD Products containing THC and Medicinal Cannabis are perceived as causing the same level of harm to one's health.



# Non-Users Of Cannabis See Frequent Usage Of Cannabis As More Harmful To Health Than Users

Both cannabis users and non-users perceive occasional cannabis use similarly when it comes to an impact on one's health. There is a larger disparity between the two groups when it comes to frequent usage. Non-users are significantly less likely to have an idea of how harmful occasional use is across all prompted product types.

% Reporting Statement As Harmful To One's Health



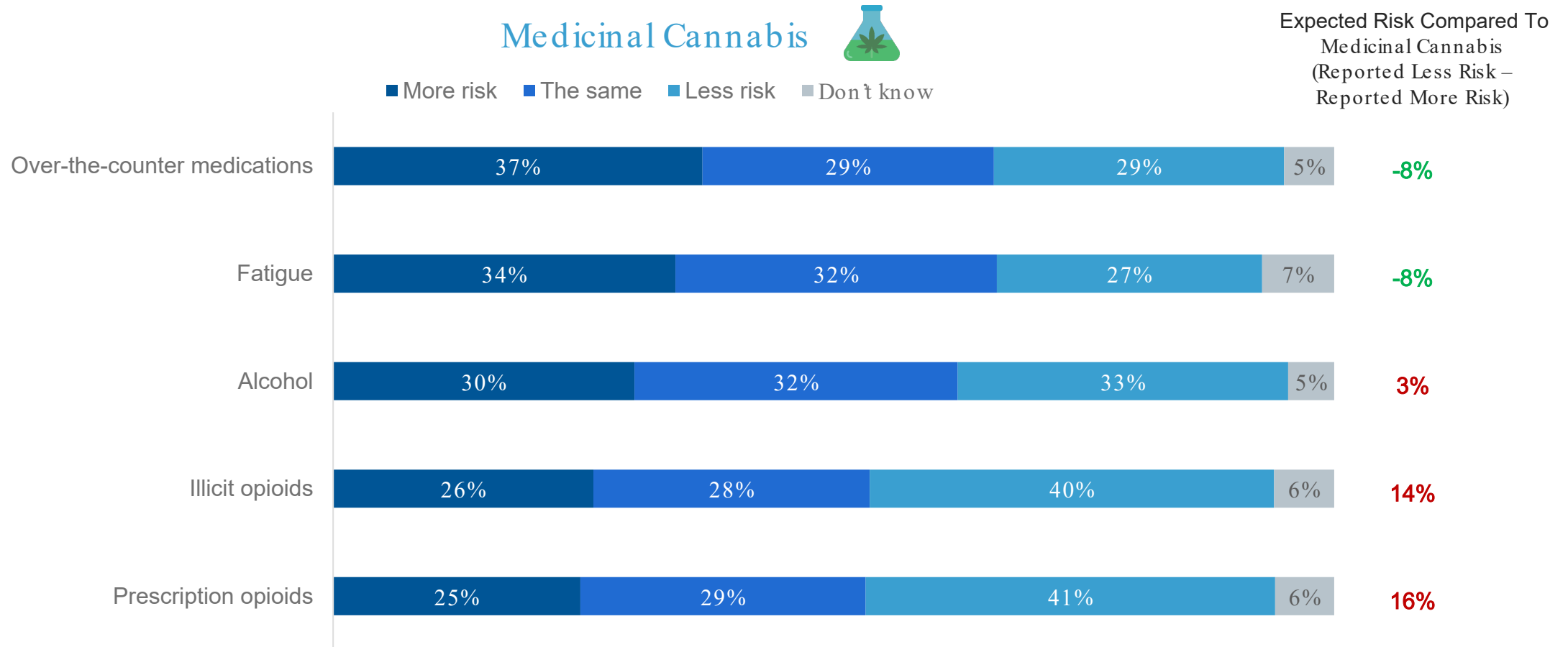
↑ ↓ shows statistically significant differences noted

Base: 1,000  
All Employees

Q15. Do you view usage of [INSERT STATEMENT], as harmful to a person's health ...

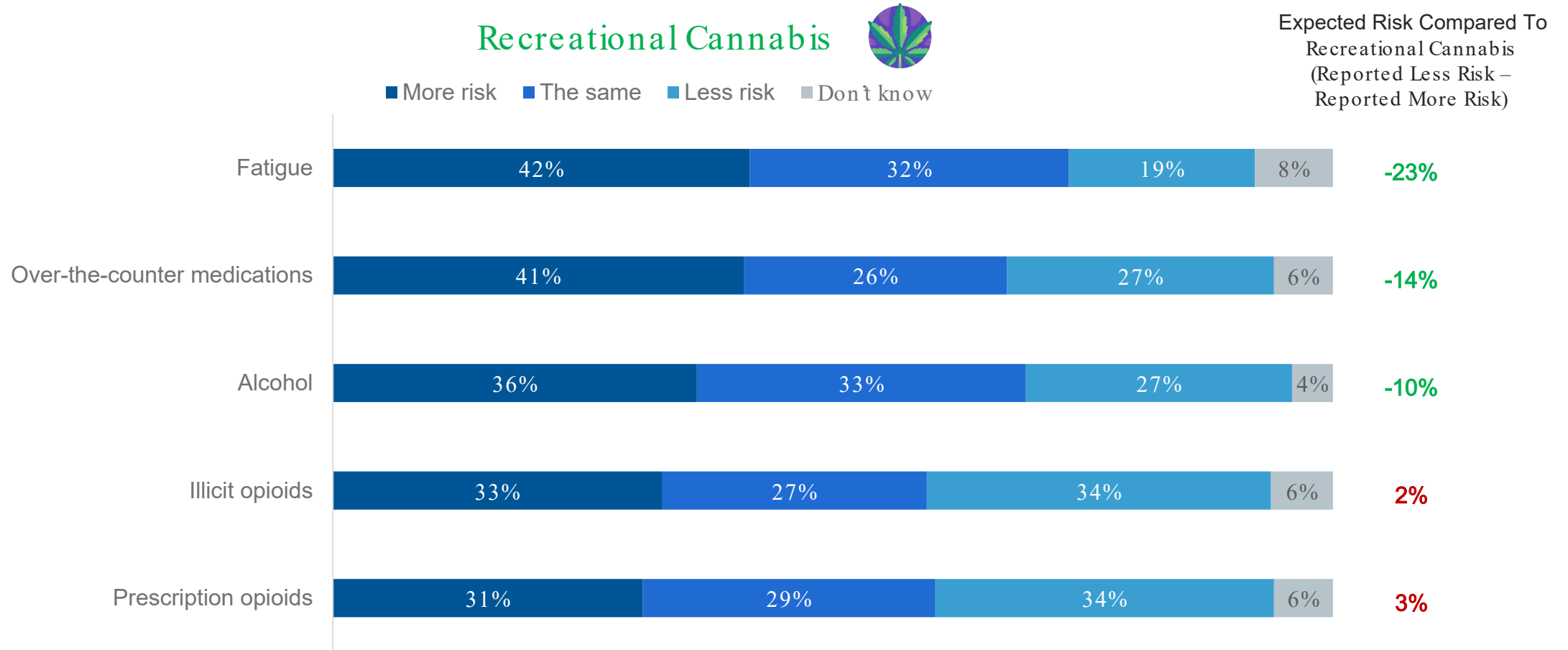
# Opioids, Even With A Prescription, Are Seen As A Higher Risk Than Medicinal Cannabis When Used During Work Hours

Fatigue and over-the-counter medications are both viewed to be less risky than medicinal cannabis. Users of cannabis products view medicinal cannabis to be less risky significantly more than non-users across all drugs prompted.



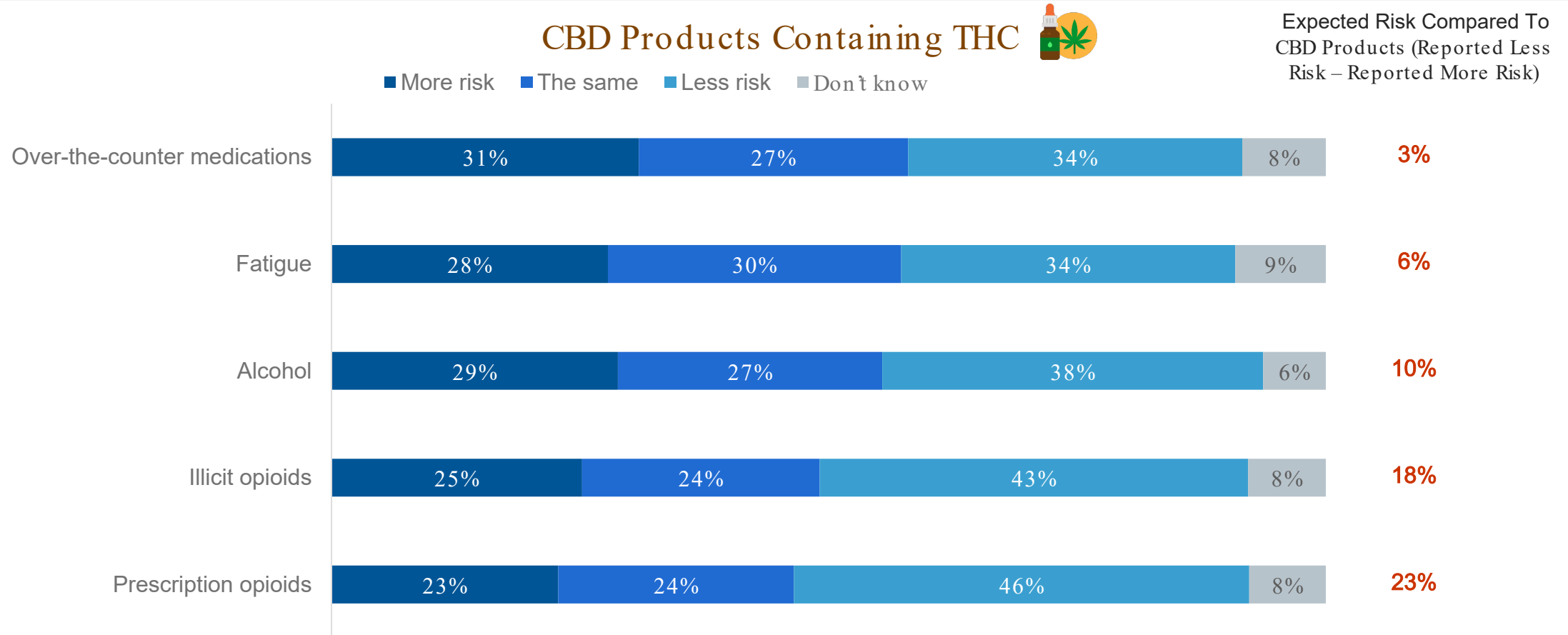
# Usage Of Recreational Cannabis During Work Hours Is Viewed As Less Risky Than Opioids, But More Risky Than Fatigue and OTC Meds

Four in ten employees perceive usage of recreational cannabis as more risky than fatigue and over-the-counter medications. Cannabis product users view recreational cannabis usage as having less risk across all tested comparators.



# Employees Perceive Usage Of CBD Products Containing THC During Work Hours As Having Lower Risk Than All Other Prompted Issues

Risk associated with CBD products containing THC is most similar to over-the-counter medications. Non-users of cannabis products were more likely to be unsure of whether CBD products containing THC carried more, less or the same risk.



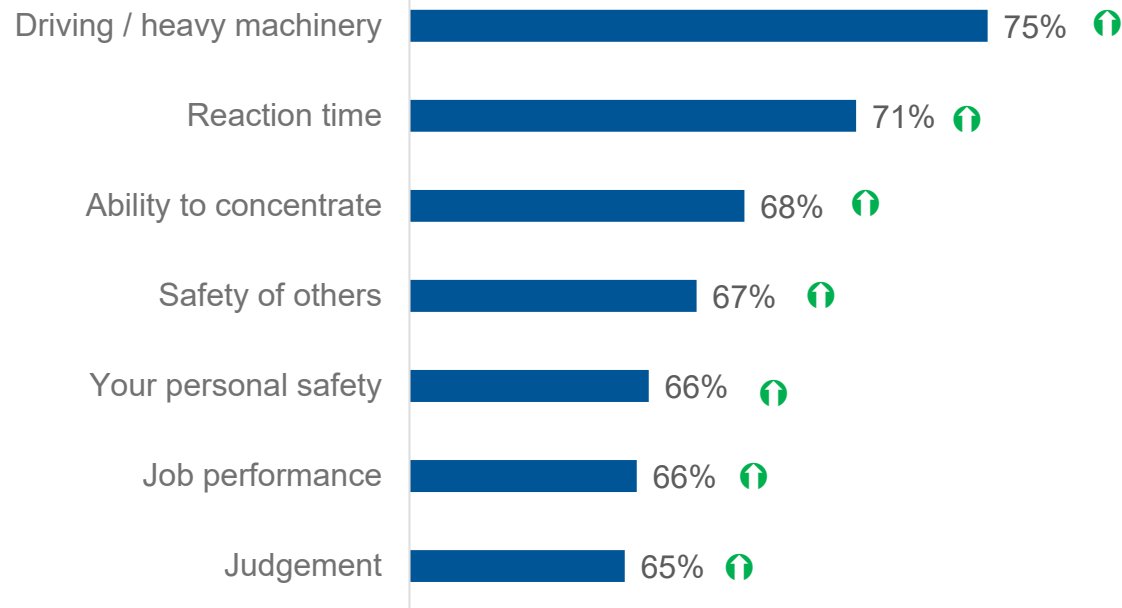




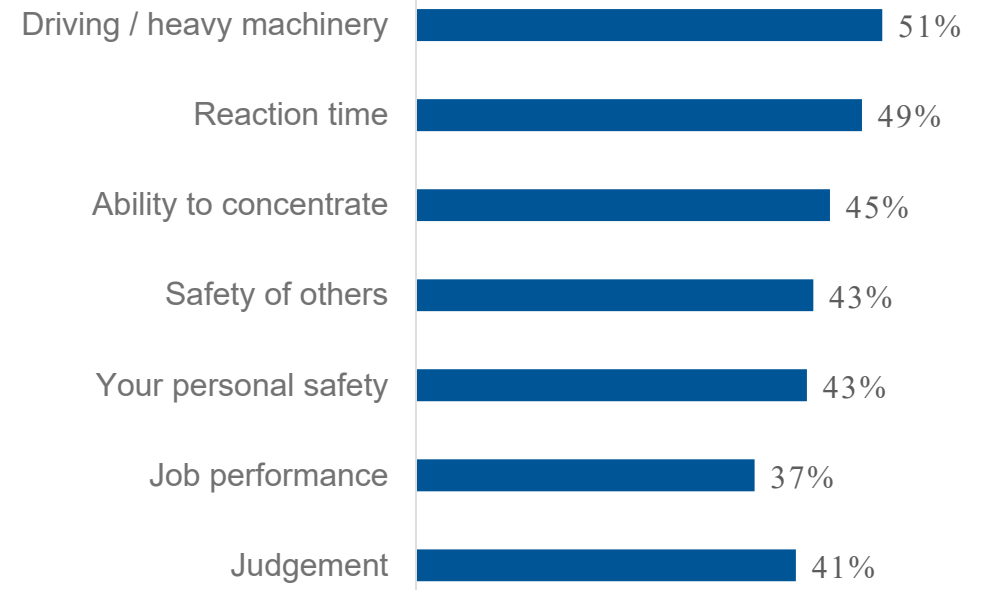
# Use Of Medicinal Cannabis Is Believed To Impair Performance, Decision Making, Especially If Usage Occurs During Work Hours

Employees perceive medicinal cannabis as most likely to impair vehicle and machinery operation if used during work hours. Across all tested aspects, use during work hours is viewed as impairing more frequently than usage outside of work hours. Non-users of cannabis products see medicinal cannabis as impairing more often than users.

## During Work Hours



## Outside Of Work Hours



shows statistically significant differences noted

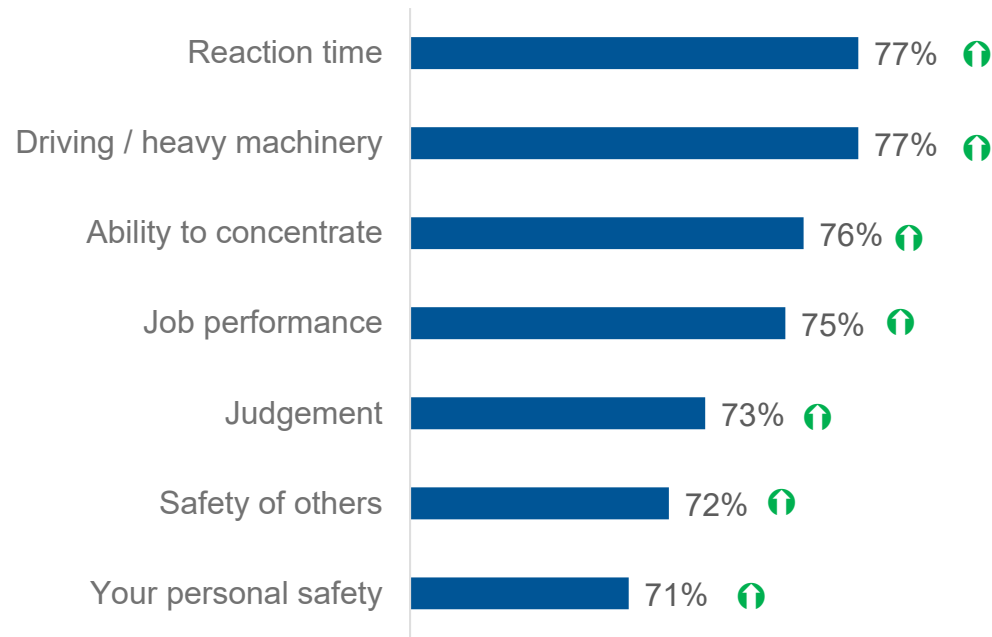
Q16. Do you feel that using medical cannabis during work hours / outside of work hours impairs any of the following in the workplace ... ?



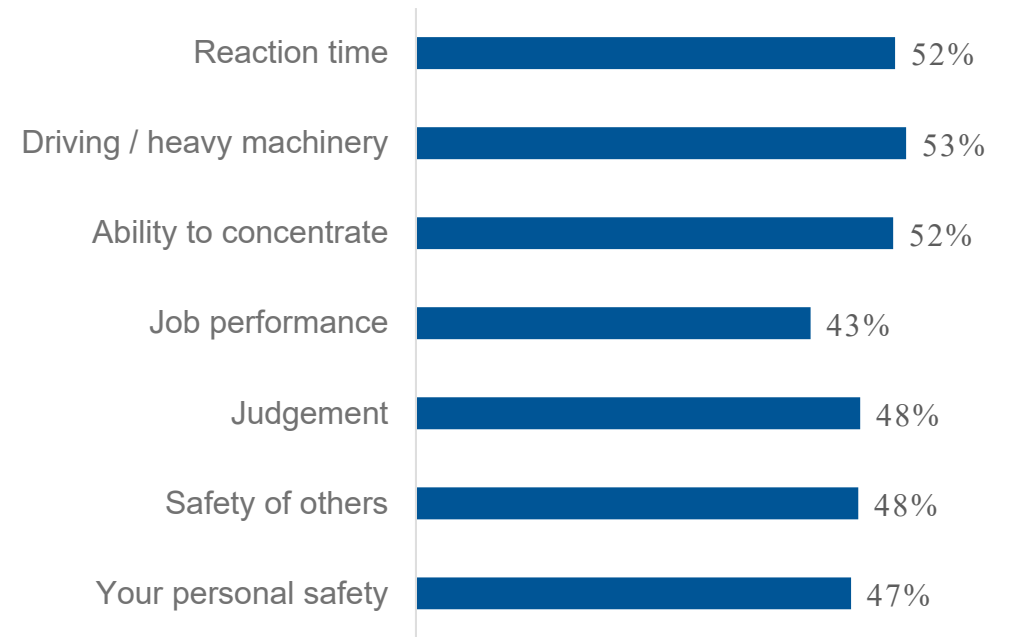
# Similar To Medicinal Cannabis, Recreational Usage Is Most Likely Viewed To Impair Reaction Time And Vehicle Or Machinery Operation

Usage of recreational cannabis is perceived as more likely to impair one's ability to safely complete their work when compared to medicinal usage. Usage during work hours is perceived as having significantly greater impacts than non-work hours. Non-Users of cannabis products are more likely to believe cannabis impairs across almost all tested factors.

## During Work Hours



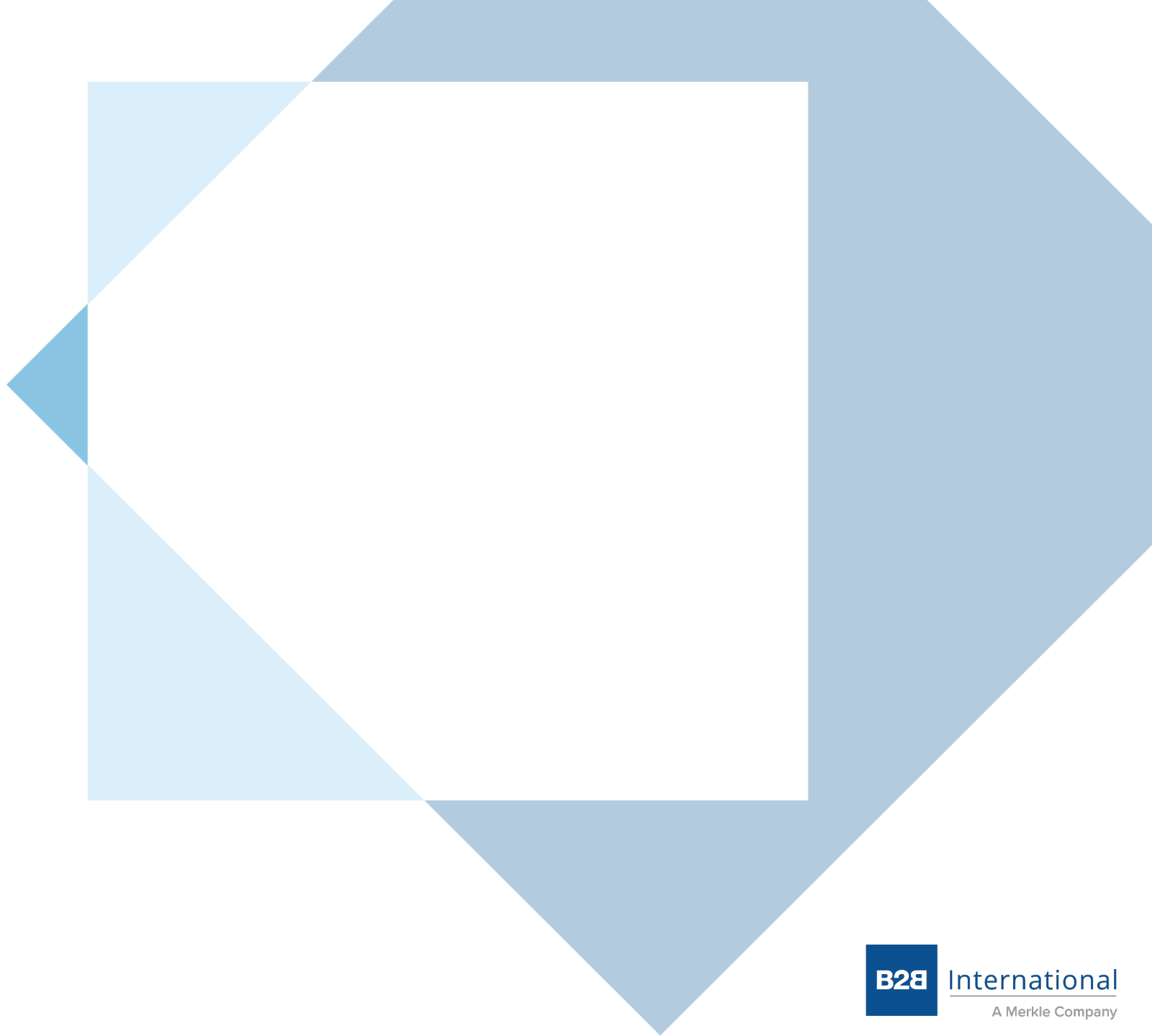
## Outside Of Work Hours



↑ ↓ shows statistically significant differences noted







# Cannabis In The Workplace





# Approximately One-Third Of Employees Have Observed Usage of Cannabis And CBD Products During Work Hours

Those in construction report observing these behaviors significantly more often than those working in other industries, while those in utilities report observing these behaviors less. This is likely the result of greater safety risks and increased regulation in utilities compared to other industries. Employees in safety-sensitive positions report observing the behaviors more often than those not in safety-sensitive positions.





% That Have Observed The Behavior During Work Hours	Overall	Industry							Safety Sensitive Position	
		Agriculture	Construction	Manufacturing	Mining	Transportation	Utilities	Wholesale Trade	Yes	No
	1,000	85	255	265	24*	160	129	82	638	362
Using cannabis	 34%	34%	45%	32%	50%	30%	22%	30%	42%	21%
Using CBD products	 31%	33%	39%	27%	42%	27%	23%	28%	36%	21%
Sharing cannabis with other employees	 29%	31%	41%	25%	54%	26%	18%	24%	37%	17%
Sharing CBD products with other employees	 24%	27%	31%	21%	42%	21%	14%	26%	29%	16%

\* Caution Low Base

 Significantly higher  Significantly lower

# Younger Employees Are Significantly More Likely To Report Observing Usage Of Cannabis And CBD Products During Work Hours

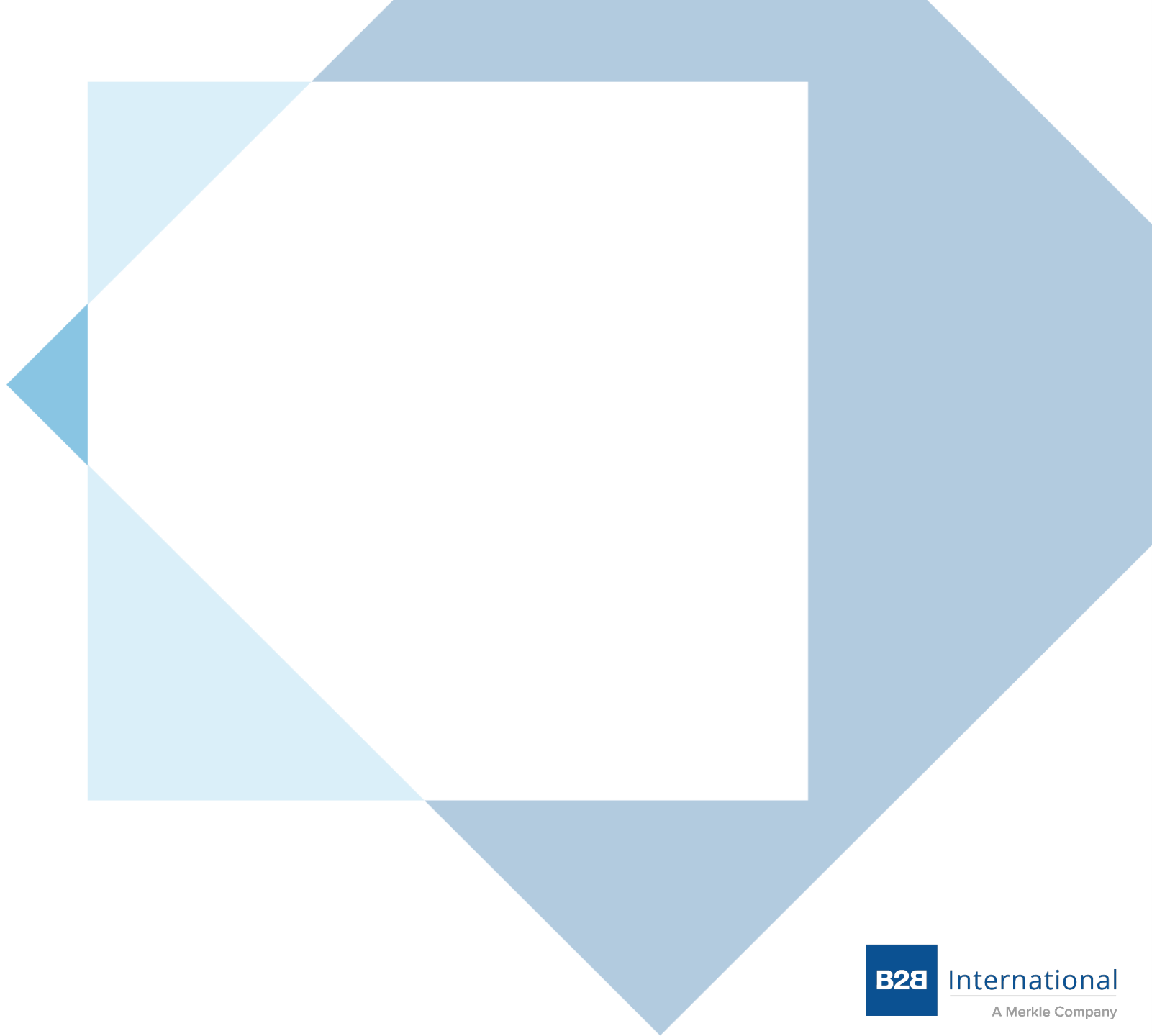
Employees ages 55 or older report seeing significantly fewer incidents than other age groups across all behaviors. This may be due to a lack of knowledge of the signs of these behaviors among older workers. Those who work at large organizations report fewer observed incidents than those who work at medium sized companies (100 to 1,000 employees) across all prompted behaviors. Current users of cannabis products report observing all of the tested behaviors more often than non-users.

% That Have Observed The Behavior During Work Hours	Overall	Employee Age			Organization Size			User Of Cannabis Product	
		Under 34	35-54	55 or older	Small	Medium	Large	User	Non-user
	1,000	227	517	255	171	480	349	475	525
Using cannabis	 34%	36%	41%	20%	39%	39%	26%	50%	20%
Using CBD products	 31%	38%	35%	15%	35%	34%	24%	49%	13%
Sharing cannabis with other employees	 29%	35%	34%	15%	35%	33%	22%	44%	16%
Sharing CBD products with other employees	 24%	32%	27%	11%	24%	27%	19%	37%	12%

 Significantly higher  Significantly lower



# Preparedness



# Organizations View Themselves As Prepared To Address Recreational & Medicinal Cannabis In The Workplace

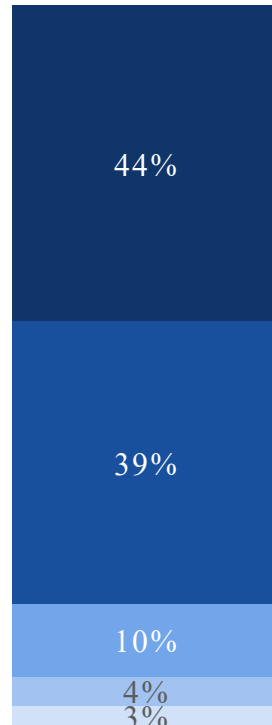


## Recreational Cannabis

**Top 2 Box**  
(Extremely / Somewhat Well Prepared)

**83%**

- Extremely well prepared
- Somewhat well prepared
- Not very well prepared
- Not at all well prepared
- Don't know

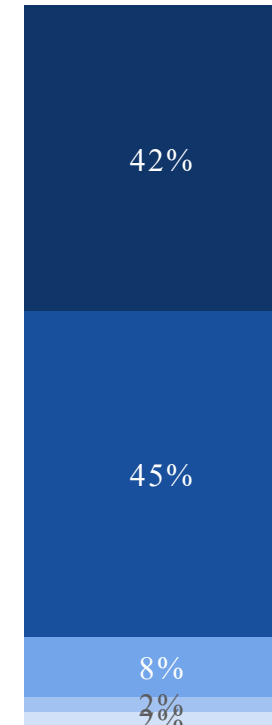


Sig. higher among those that drug test in all circumstances (58%), those familiar with NSC (66%)



## Medical Cannabis

**87%**



Sig. higher among those that drug test in all circumstances (52%), those familiar with NSC (65%)

shows statistically significant differences noted

Base: 500  
All Employers

Q22/23. How well prepared do you think your organization is when addressing medical/recreational cannabis in the workplace?

# Employers Are More Likely To View Themselves As Prepared To Address Recreational & Medicinal Cannabis In The Workplace Than Employees



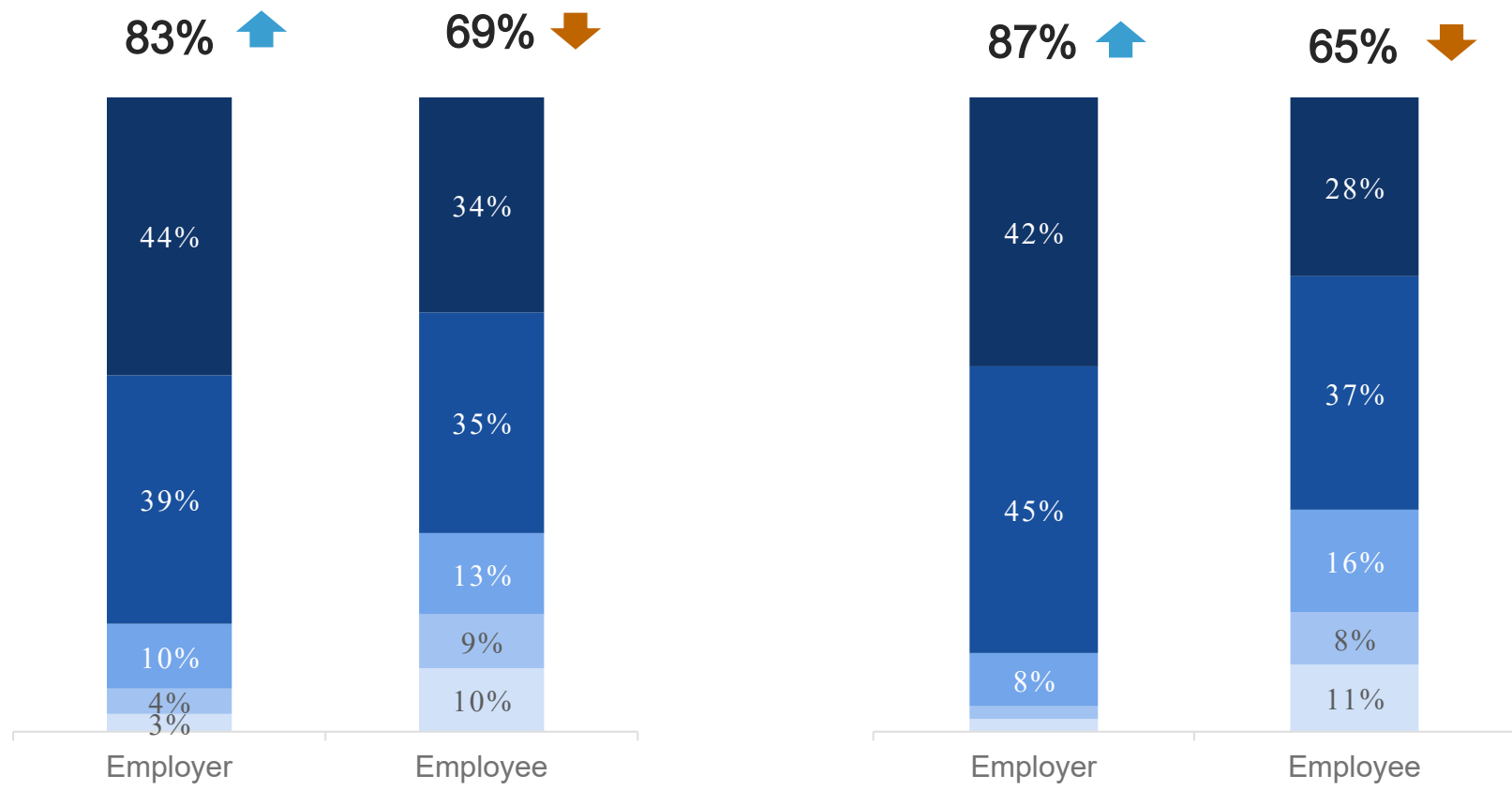
## Recreational Cannabis



## Medical Cannabis

**Top 2 Box**  
(Extremely / Somewhat Well Prepared)

- Extremely well prepared
- Somewhat well prepared
- Not very well prepared
- Not at all well prepared
- Don't know



Base: 500  
All Employers  
Base: 1,000  
All Employees

Employer

Employee



shows statistically significant differences noted

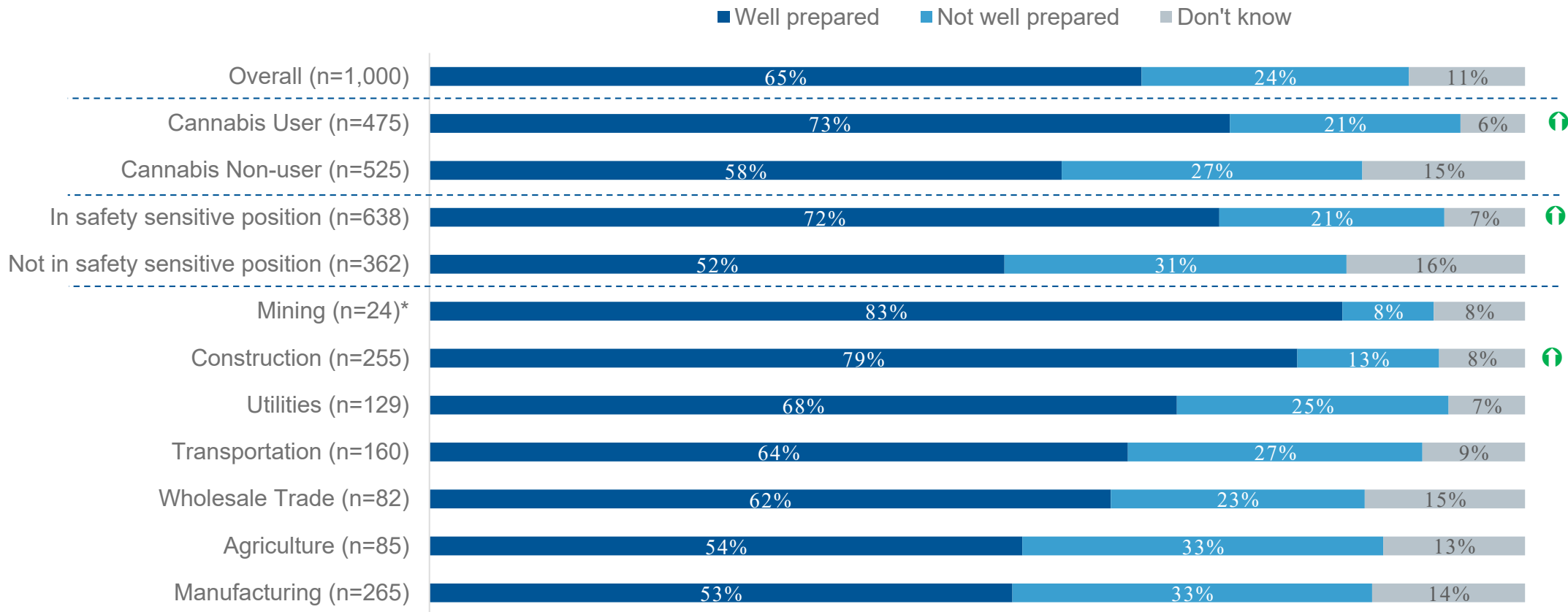
Q22/23. How well prepared do you think your organization is when addressing medical/recreational cannabis in the workplace?





# Two-Thirds Of Employees Feel Their Organization Is Well Prepared To Address Medicinal Cannabis

Employees who use cannabis and those who are in safety sensitive positions are significantly more likely to think of their organization as well prepared when it comes to addressing medicinal cannabis in the workplace. Employees in the construction industry are more likely to believe their organization is well prepared when compared to other industries.



↑ ↓ shows statistically significant differences noted

\* Caution Low Base

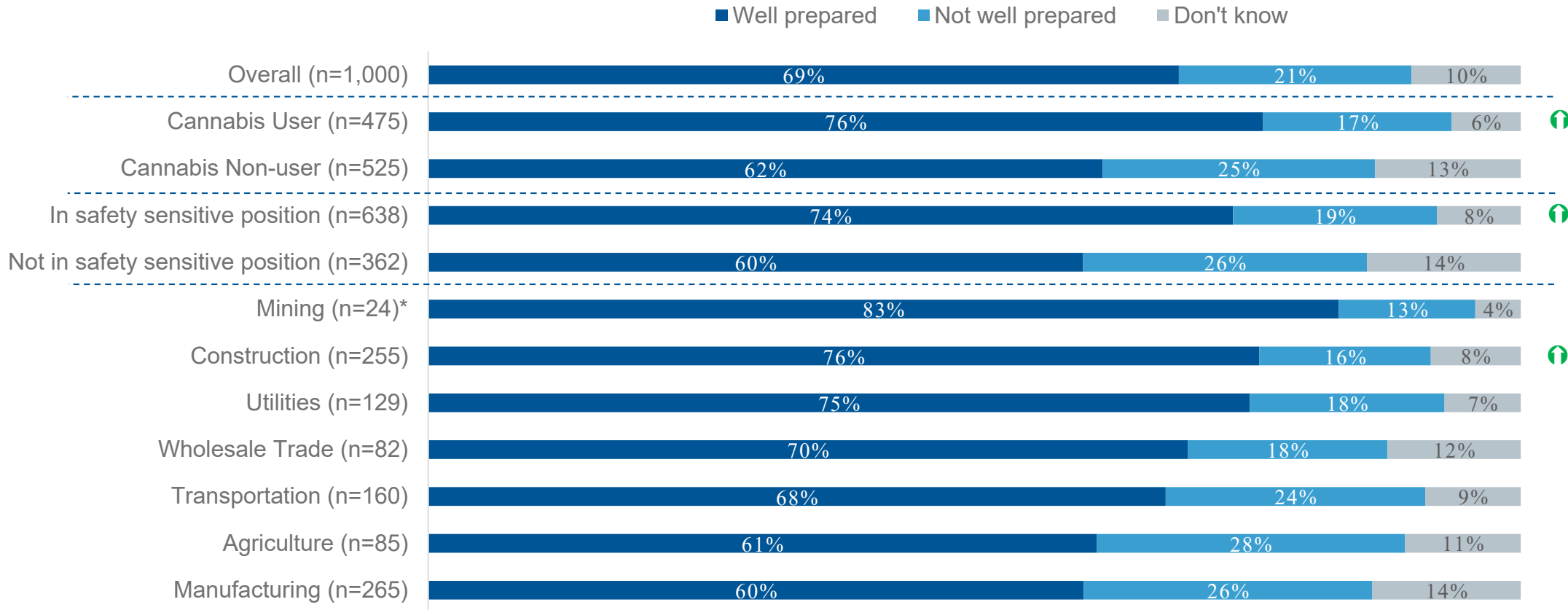
Q29. How well prepared do you think your organization is when addressing medicinal cannabis in the workplace?  
Q31. Why do you say that?

Base: Varies  
By Cannabis User,  
Safety Sensitive  
Position, Industry



# Nearly 7 In 10 Employees Feel Their Organization Is Well Prepared To Address Recreational Cannabis

Similar to medicinal cannabis, users and those in safety sensitive positions are more likely to think of their organization as well prepared when it comes to addressing recreational cannabis in the workplace. Employees in the construction industry are more likely to believe their organization is well prepared when compared to other industries.



↑ ↓ shows statistically significant differences noted

\* Caution Low Base

Q30. How well prepared do you think your organization is when addressing recreational cannabis in the workplace?  
Q31. Why do you say that?

Base: Varies  
By Cannabis User,  
Safety Sensitive  
Position, Industry



# Reasons Their Organization Is Not Prepared: Medical Cannabis In Their Own Words

*"It's changing so much It's hard to keep up with where the law is going"*  
– Manager / Director, Manufacturing

*"It hasn't shown itself to be any kind of problem within our organization as yet"*  
– Senior Leadership, Agriculture

*"We're not particularly prepared for situations where employees use medical marijuana in the workplace, which leads to accidents at work."*  
– Human Resources, Agriculture

*"The issue has not been raised and has not come to the attention of upper management who seem to be waiting for a reason to address it"*  
– Senior Leadership, Construction

*"Whether medical or recreational, not much is addressed past the onboarding stage"*  
– Human Resources, Wholesale Trade

*"We currently have **zero tolerance policy** If an employee tests positive, they will be terminated. If medical marijuana is legalized, we may have to look at what would be a reasonable amount in a drug test"*  
– Human Resources, Manufacturing

*"Because legalization has been in the works for awhile now and we still haven't implemented anything on this and we were expected to have all of these measures in place."*  
– Senior Leadership, Transportation & Warehousing

Base: 386

Among Employers Who Feel Their Organization Is Not Prepared

Q22. How well prepared do you think your organization is when addressing medical cannabis in the workplace?  
Q24. Why do you say that?



# Reasons Their Organization Is Not Prepared: **Medical Cannabis** In Their Own Words

*"It's just not something that people think about. The recreational variant, sure. The **medical though is an afterthought** the majority of the time."  
-Manufacturing*

*"Because **they do not talk enough about it** so that tells me that they're not at all prepared."  
- Wholesale Trade*

*"I'm unsure if management truly understands the **differences in the specific types of cannabis**  
- Construction*

*"The organization does not make this distinction and **treats all cannabis the same way**  
-Wholesale Trade*

*"Focus is more on alcohol and pills"  
- Transportation & Warehousing*

*"It isn't legal in our state, so they don't have a **policy on its use**"  
-Manufacturing*

*"As **medical cannabis is new** we have **less established policies in place currently** and are developing some"  
- Manufacturing*

Base: 244

Among Employees Who Feel  
Their Organization Is Not  
Prepared

Q29 How well prepared do you think your organization is when addressing medical cannabis in the workplace?  
Q31. Why do you say that?



# Reasons Their Organization Is Not Prepared: Recreational Cannabis In Their Own Words

*"We don't have strict policies. We haven't done enough in this aspect. The company hasn't made comprehensive punishment regulations for employees who smoke marijuana at work."  
- Safety Supervisor, Manufacturing*

*"It is a tough line for recreational, as what people do on their own time is hard to legislate. It is only when they enter work that our rules can again be enforced."  
- Manager / Director, Manufacturing*

*"There is more we need to do to be better prepared for this."  
- Safety Compliance Officer, Manufacturing*

*"We are still in the very early stages of considering how to revise our policies on recreational use."  
- Human Resources, Utilities*

*"We are still discussing and deciding what to do."  
- Safety Compliance Office, Manufacturing*

*"Recreational use is forbidden in this state."  
- Senior Leadership, Agriculture*

*"No effort has been made to create a plan to deal with it because it is not seen as a current problem."  
- Senior Leadership, Construction*

Base: 388

Among Employers Who Feel Their Organization Is Not Prepared

Q23. How well prepared do you think your organization is when addressing recreational cannabis in the workplace?  
Q24. Why do you say that?



# Reasons Their Organization Is Not Prepared: **Recreational Cannabis** In Their Own Words

*“Again, because of CDL there is **no use policy**, however, the employees **would be back to work almost immediately**”*  
– Utilities

*“Policy exists... but **they'd lose a lot of employees if they enforced it.**”*  
– Manufacturing

*“There is still really **no talk of cannabis** just other drugs and substances in general.”*  
– Manufacturing

*“Work **seems to assume that no one uses marijuana, either at work or outside of work**”*  
– Manufacturing

*“They already **can't get employees** because they test for marijuana via hair follicles and **80% fail**”*  
– Wholesale Trade

*“There is **no written policy**. The bosses can react differently for each situation.”*  
– Construction

*“Our **HR department is not very strong** doubt they've been giving this a thought.”*  
– Transportation & Warehousing

Base: 213

Among Employees Who Feel  
Their Organization Is Not  
Prepared

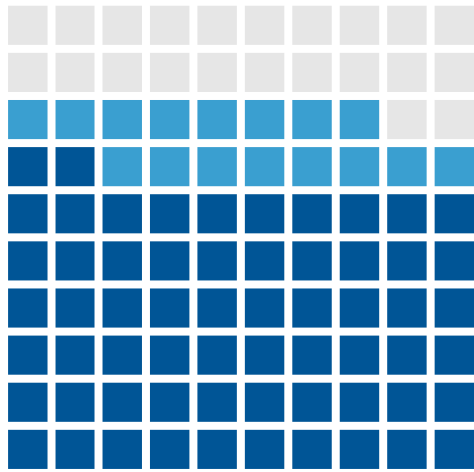
Q30 How well prepared do you think your organization is when addressing recreational cannabis in the workplace?  
Q31. Why do you say that?



## Policies & Communication

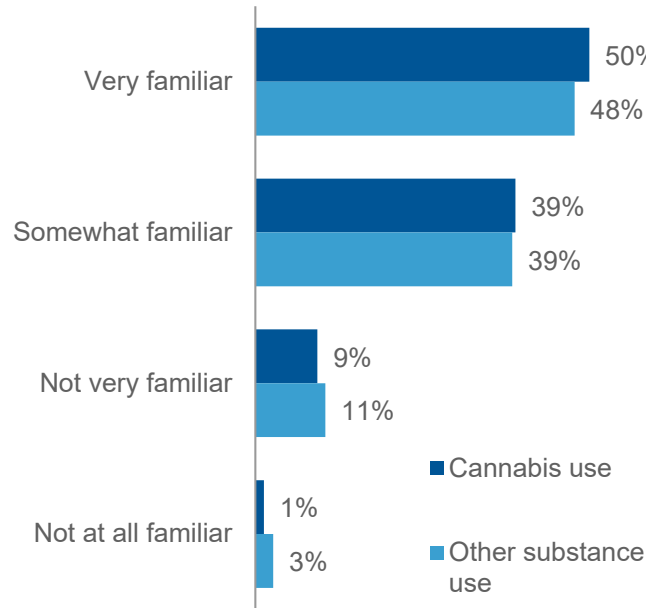
# Employees Report Nearly Two-Thirds Of Their Organizations Have Cannabis Policies In Place

Of those with a policy, nearly 9 in 10 are at least somewhat familiar with the policy and 8 in 10 feel the policy is fair.



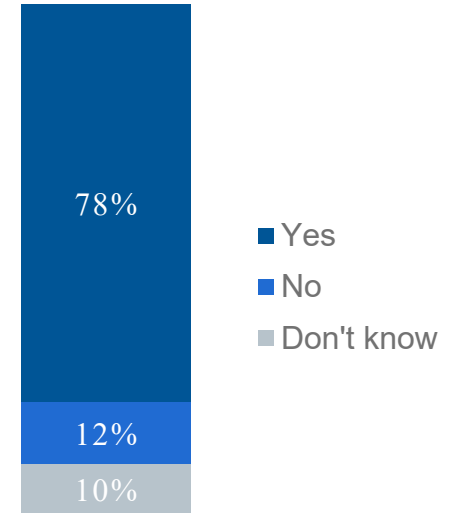
62%

Have a policy regarding cannabis use, while 78% have a policy for other substances



89%

With a cannabis policy in place are at least somewhat familiar with the policy. Familiarity is in line with policies around other substances.



78%

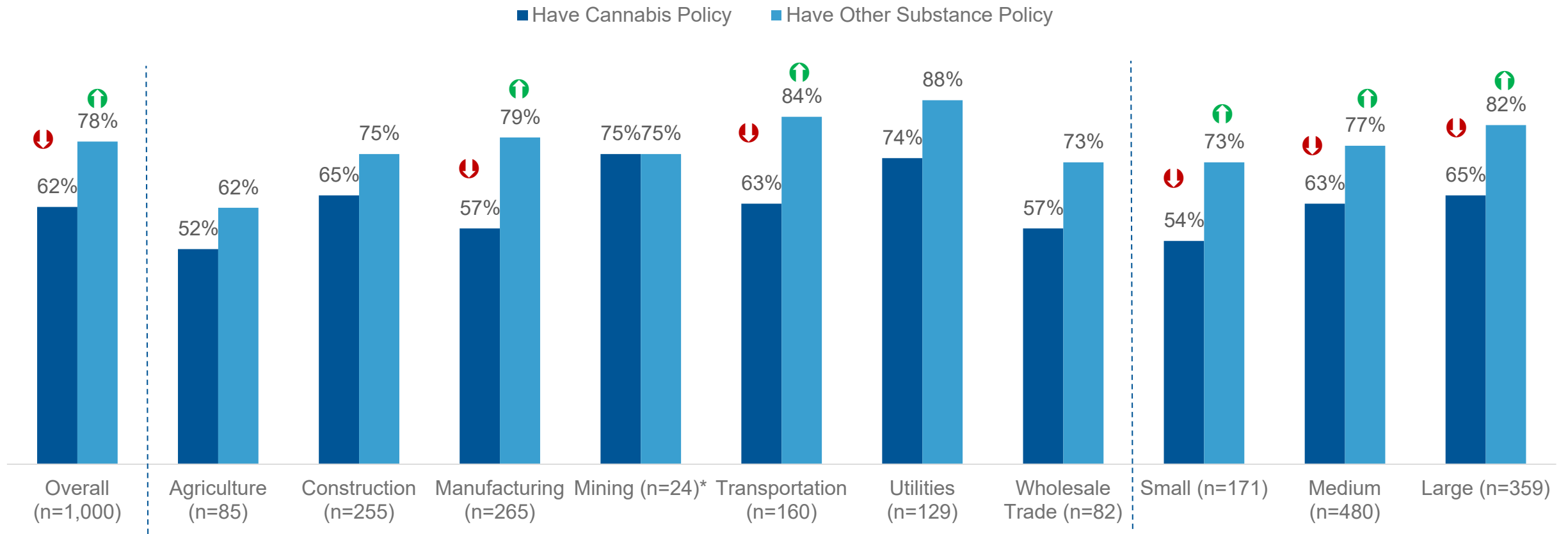
Of those with a policy in place regarding *cannabis* feel it is fair

Q21. To the best of your knowledge, does your organization have policies surrounding cannabis use / other substance use?  
 Q22. How familiar are you with your organization's policies surrounding cannabis use / other substance use?  
 Q23. Do you feel your organizations policies on Cannabis use are just / fair?



# Organizations Are More Likely To Have Policies In Place For Other Substances Than For Cannabis

Regardless of industry (with the exception of mining\*) or organizational size, employees are more aware of their organization having policies for other substances compared to cannabis. An opportunity exists for NSC to push the importance of having these policies, especially in high risk industries.



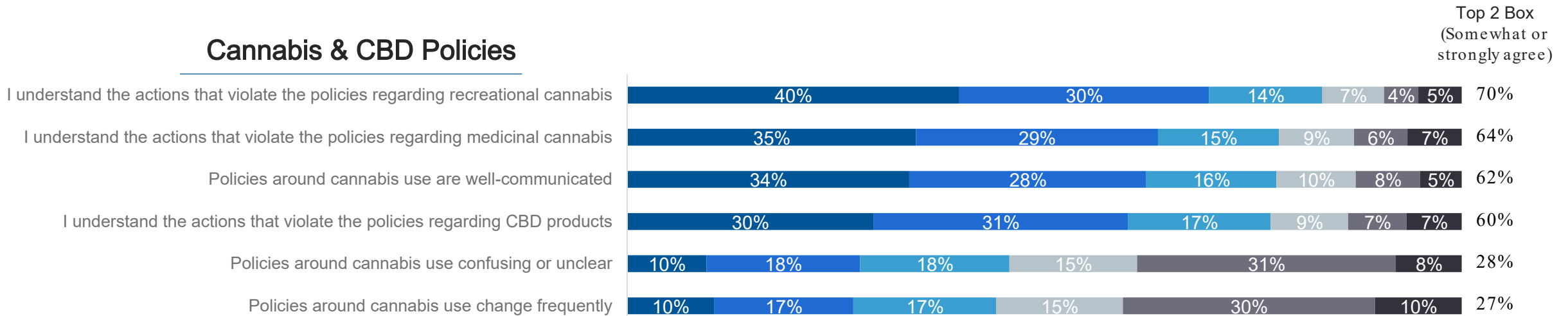
\* Caution Low Base

↑ ↓ shows statistically significant differences noted

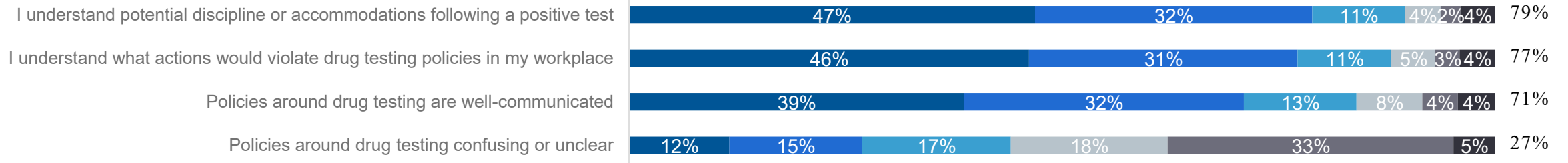
# Most Employees Understand Policies In Place Regarding Cannabis Use And Drug Testing

In general, employees are more familiar with company policies surrounding drug testing than cannabis use. Only about 3 in 10 employees describe their organizations policies around cannabis use and drug testing as confusing or unclear.

## Cannabis & CBD Policies



## Drug Testing



■ Strongly Agree  
 ■ Somewhat Agree  
 ■ Neither Agree Nor Disagree  
 ■ Somewhat Disagree  
 ■ Strongly Disagree  
 ■ Don't Know / Doesn't Apply

Base: 1,000  
All employees

Q26. Please rate your level of agreement with the following statements ...

# Reasons Their Organizations Policies On Cannabis Are Unfair: In Their Own Words

## Testing Limitations

*"You can test positive for THC in your system days and weeks after doing it. There needs to be better testing methods"*  
 –Transportation & Warehousing

*"We are subject to random drug tests, but with cannabis you can fail a drug test even if you haven't consumed any in days. Just because it's still in your system doesn't mean it's still affecting you just because you test positive doesn't mean you were using at work"*  
 –Manufacturing

## Treatment Of Cannabis Compared To Other Substances

*"Marijuana is a safe drug. Alcohol is legal and kills people."*  
 – Transportation & Warehousing

*"Employees get penalized far more for cannabis than alcohol"*  
 – Wholesale Trade

*"Cannabis is safer than caffeine but is treated harsh when it shouldn't be."*  
 – Manufacturing

## Restrictions On Use

*"Employees that use recreational or medical marijuana even outside of work are susceptible to being fired. This is unjust, as a company has no control what an employee chooses to do outside of work"*  
 – Construction

*"I work under a Federal license and am subject to drug testing. Marijuana is legal in my state but will get me fired even if used off duty. What I do when not at work should be my business"*  
 –Transportation & Warehousing

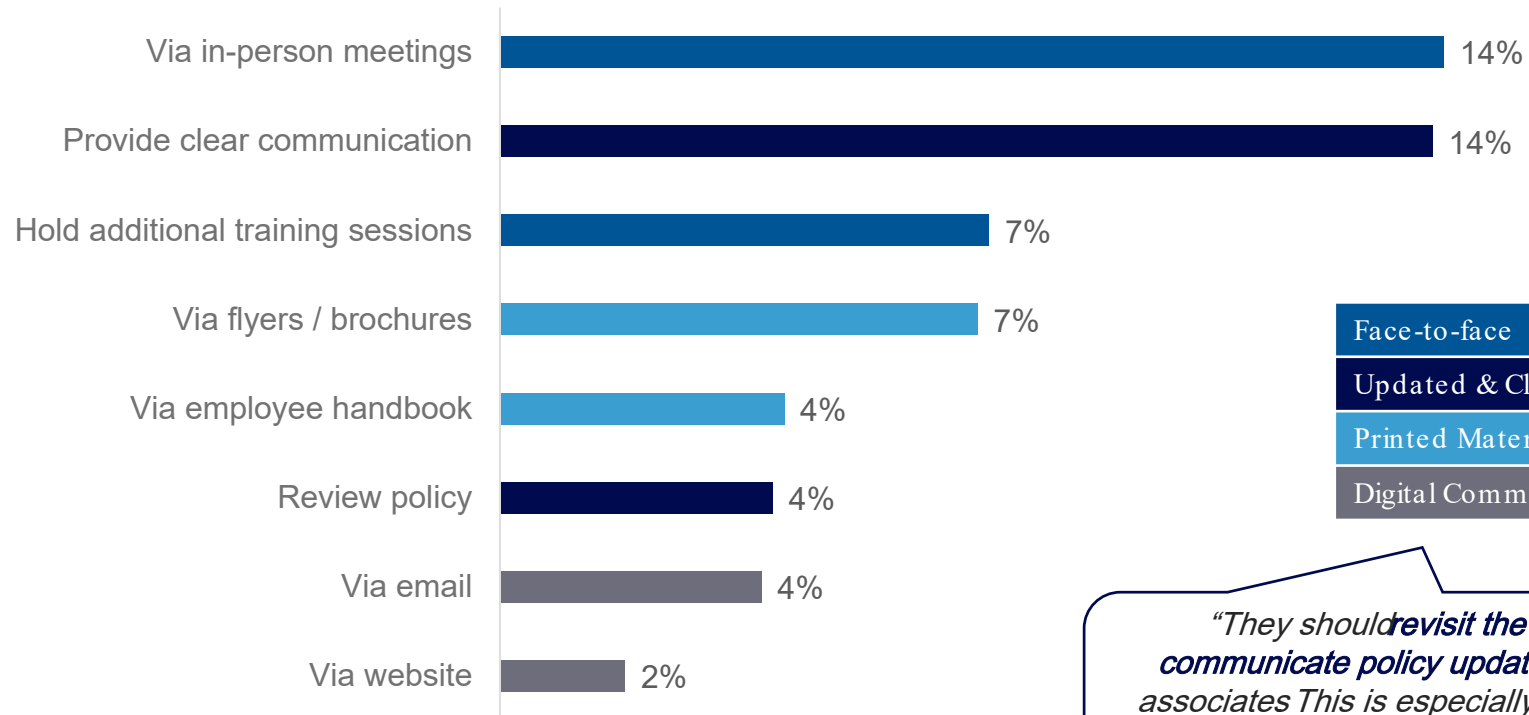
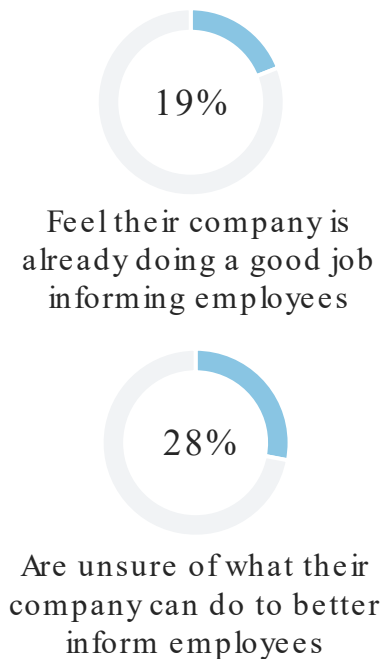
Base: 76

Among Employees  
 Who Feel Policies  
 Are Unfair

Q23. Do you feel your organizations policies on Cannabis use are just / fair?  
 Q24. Why do you say that?

# How Organizations Can Better Inform Employees About Cannabis Policies

Regular, in-person meetings to reiterate policies are most desired by employees. However, employees indicate providing clear communication through any form would be effective. Many employees were less certain of their organizations policies around cannabis because they haven't heard about updates despite changes to the legal status of cannabis in their state.



Face-to-face	21%
Updated & Clear Communication	18%
Printed Materials	11%
Digital Communication	6%

*"They should ~~revisit~~ **revisit the policy more often and communicate policy updates and / or changes** to the associates This is especially important with many states working harder to legalize recreational use."  
-Wholesale Trade*

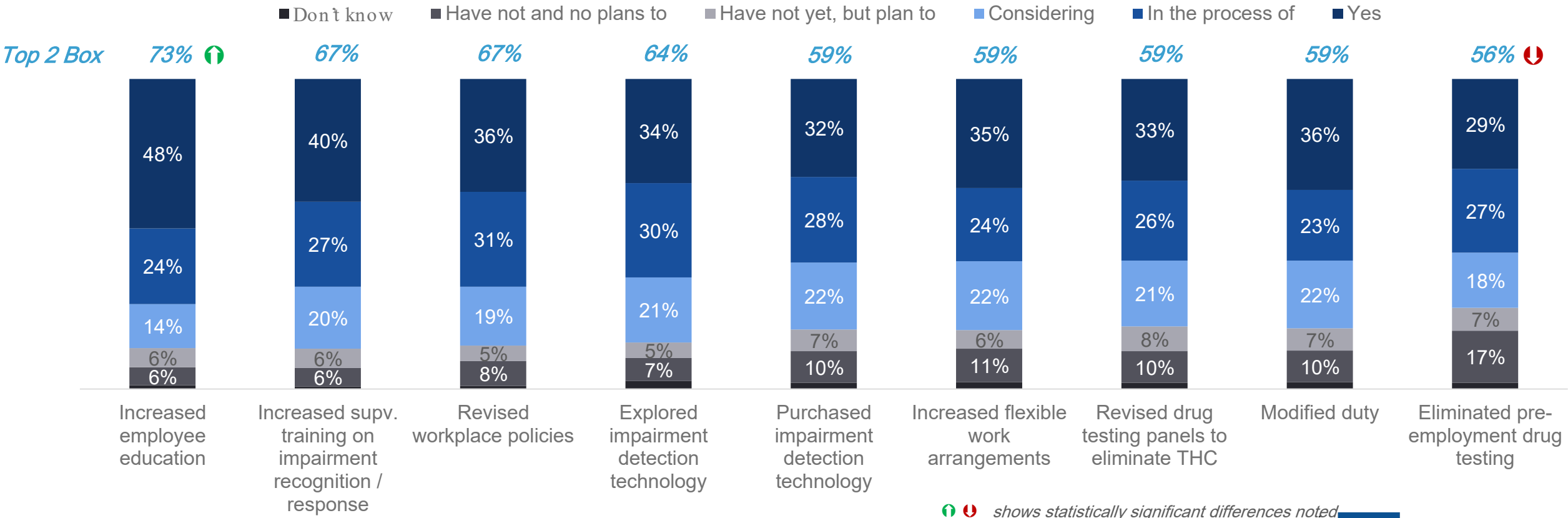
Base: 622  
Among Employees  
Who Have Policies  
Regarding Cannabis

Q25. How could your employer better inform you about workplace policies around cannabis use?



# Increased Employee Education Is The Most Common Response To A State Legalizing Medical Marijuana, Followed By Increased Training Of Supervisors And A Revision Of Policies

Eliminating pre-employment drug testing is least likely to be implemented following the legalization of medical cannabis, however over half of employers still indicate that this is something their organization has performed.

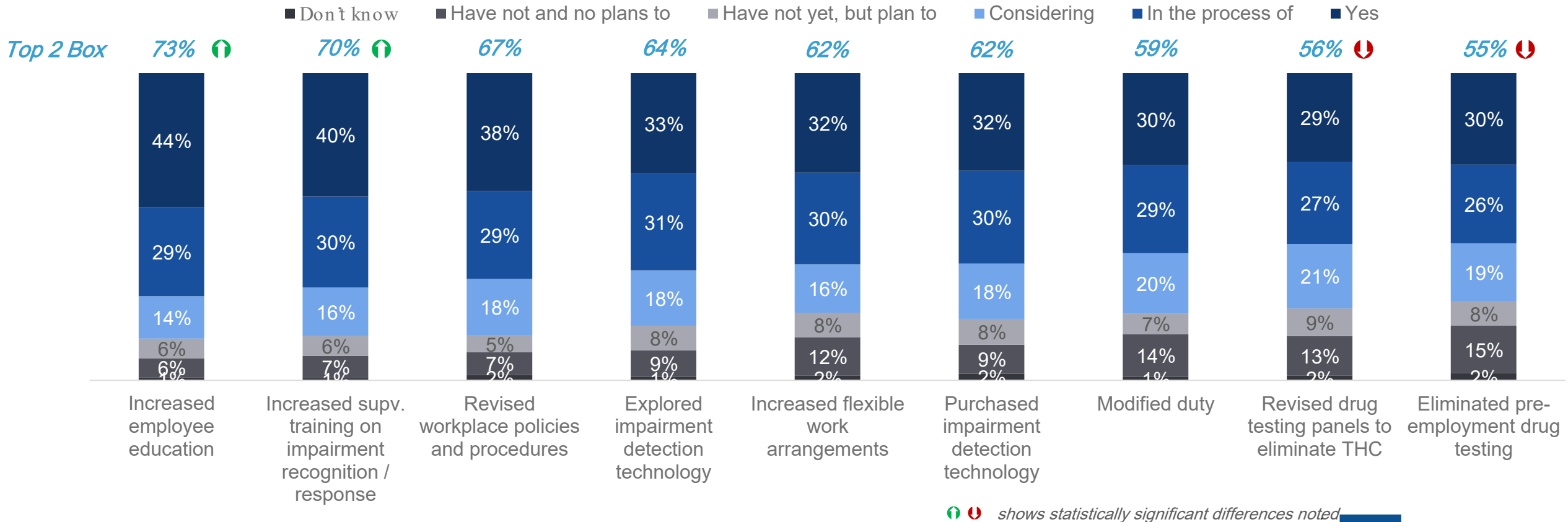


↑ ↓ shows statistically significant differences noted



# When Recreational Cannabis Is Legalized Or The Potential Of Legalization Exists, Employers Take A Similar Approach To Medical Cannabis Focusing On Education / Training And Revising Workplace Policies

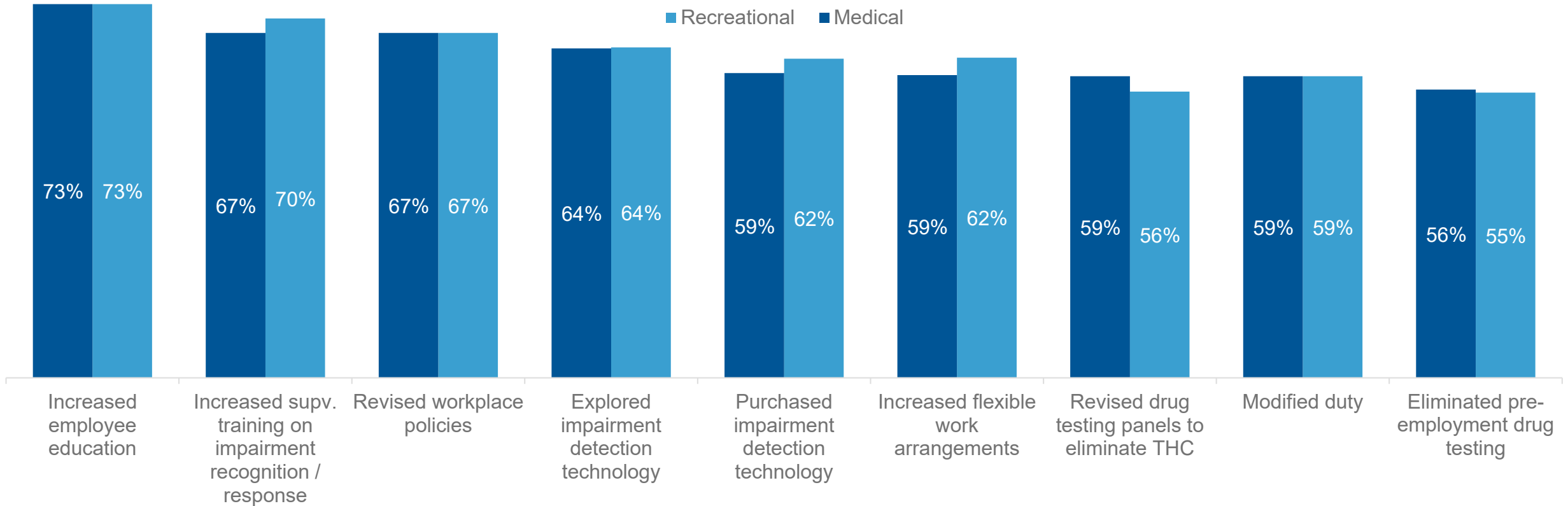
Employers are significantly less likely to make changes to drug testing, including eliminating THC or pre-employment screening.



↑ ↓ shows statistically significant differences noted

# Employer Response To Legalization Of Medical And Recreational Cannabis Is Similar Across The Board

% Performed Or In Process Of Performing

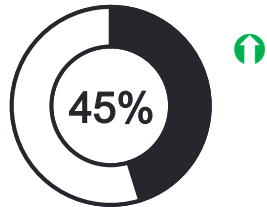


# Written Policies Concerning Recreational And Medical Cannabis

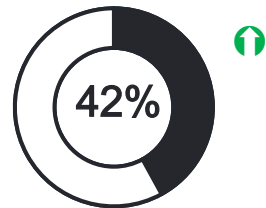
Nearly half of organizations have a written policy regarding the use of recreational cannabis on the job followed closely by the use of medical cannabis on the job and recreational cannabis off the job. Policies around the use of medical cannabis off the job are not as common in most organizations.

## Policies In Place

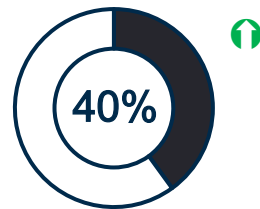
Use of recreational cannabis on the job



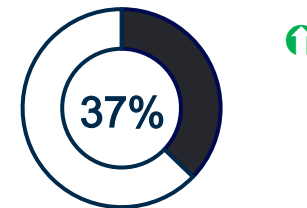
Use of medical cannabis on the job



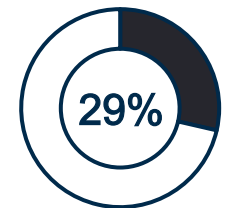
Use of recreational cannabis off the job



Zero tolerance for cannabis for workers in safety sensitive positions



Use of medical cannabis off the job



↑ Sig. higher among states where medicinal cannabis is illegal/restricted (48%), as well as among states where recreational cannabis is illegal (45%)

↑ ↓ shows statistically significant differences noted

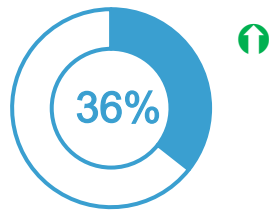


# Other Written Policies Currently In Place

Written policies about drug testing and an Employee Assistance Program are significantly higher among organizations in states in which medical and recreational cannabis is illegal.

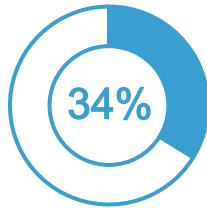
## Policies In Place

### Use of alcohol



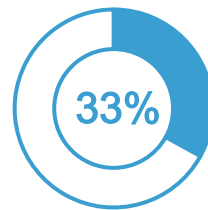
*Sig. higher among those not federally regulated (54%)*

### Drug Testing



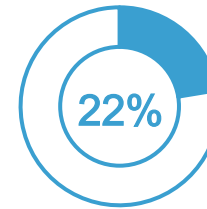
*Sig. higher among states where medicinal cannabis is illegal/restricted (46%), states where recreational cannabis is illegal (42%), for those not federally regulated (47%)*

### Employee assistance program (EAP)



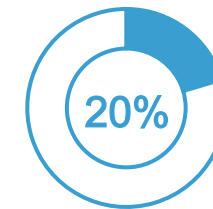
*Sig. higher among states where medicinal cannabis is illegal/restricted (43%), states where recreational cannabis is illegal (41%)*

### Fit for duty clause



*Sig. higher among states where recreational cannabis is illegal (29%)*

### Return to work protocols for employees undergoing substance use treatment

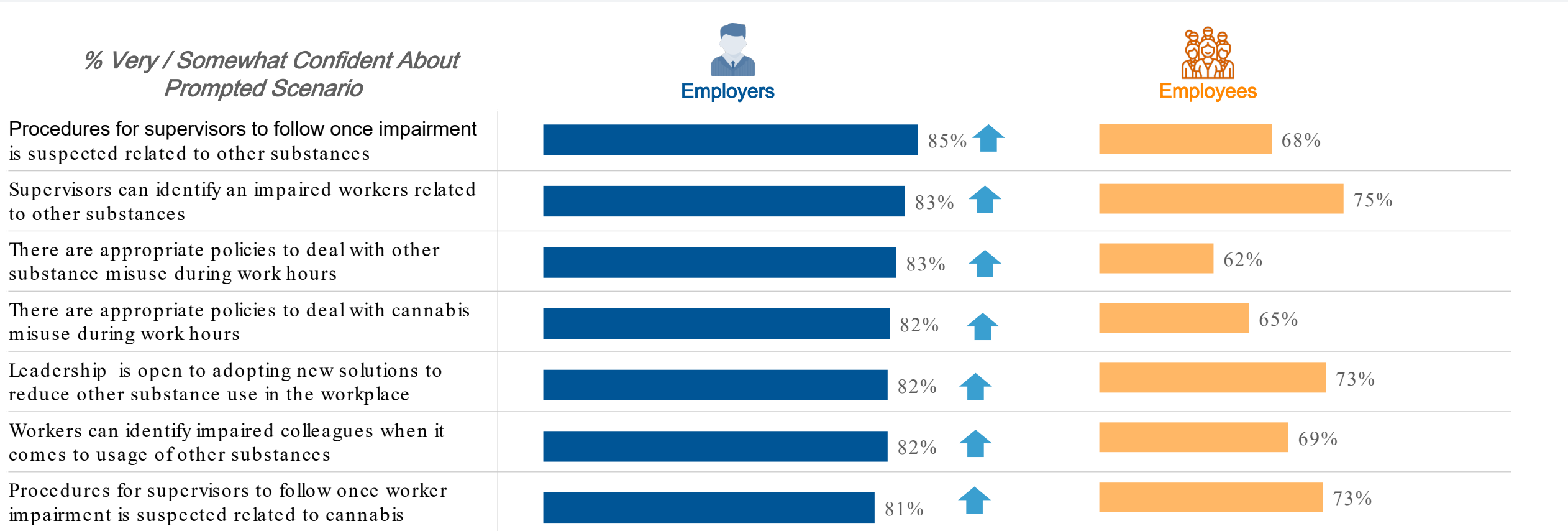


*Sig. higher among states where recreational cannabis is illegal (27%), for those not federally regulated (31%)*

  shows statistically significant differences noted

# Employers Are More Confident In Policies, Particularly Those Around Substance Abuse

8 out of 10 employers' express confidence around policies and procedures in their workplace. Employees are significantly less likely to feel the same way, particularly when it comes to policies around cannabis.



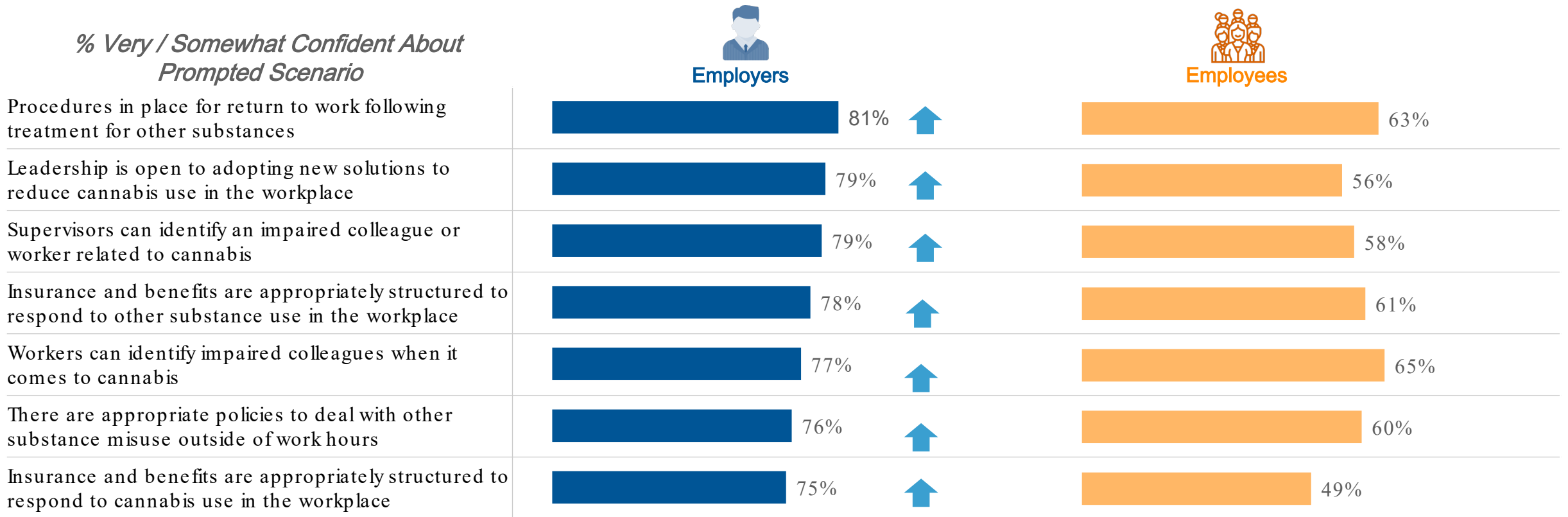
shows statistically significant differences noted

Base: 500  
All Employers  
Base: 1,000  
All Employees

Q14/15. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis / other substances that cause impairment? Q19/20. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis / other substances that cause impairment?

# Employers Express More Confidence Than Employees On Procedures And Policies Related To Cannabis & Substance Use

Employees are least confident about their organization having insurance and benefits that is aligned to deal with cannabis use in the workplace.



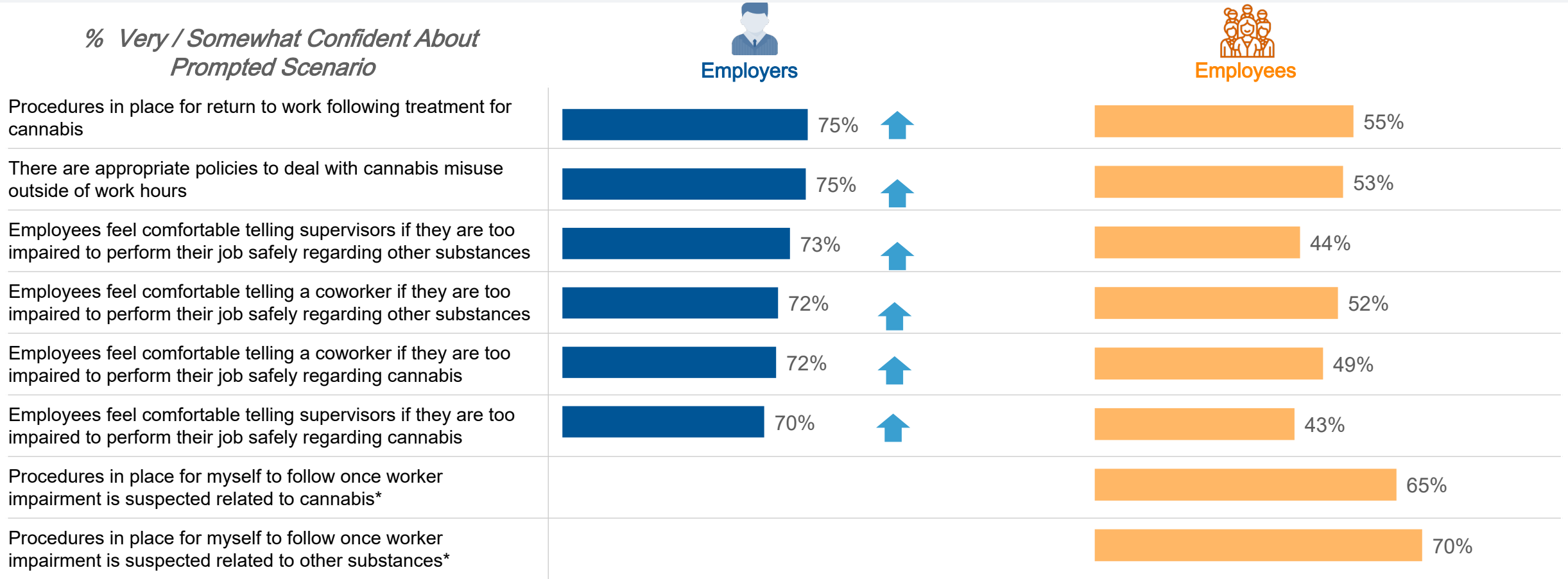
shows statistically significant differences noted

Base: 500  
All Employers  
Base: 1,000  
All Employees

Q14/15. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis / other substances that cause impairment? Q19/20. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis / other substances that cause impairment?

# Employees Are Fairly Confident There Are Policies For Them To Follow Once Worker Impairment Is Suspected, But Less Confident When It Comes To Communication

While approximately 7 out of 10 employers feel employees would feel comfortable telling their supervisor they were too impaired to perform their job safely, however only 4 out of 10 employees feel the same way. Employees are slightly more comfortable telling coworkers (approx. 5 out of 10) they are impaired. Employers should work to reassure employees through communication (e.g., anonymous reporting procedures, confidentiality etc.)



Base: 500  
All Employers  
Base: 1,000  
All Employees

\* Note: Only asked to Employees  
Q14/15. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis?  
Q19/20. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of other substances that cause impairment?



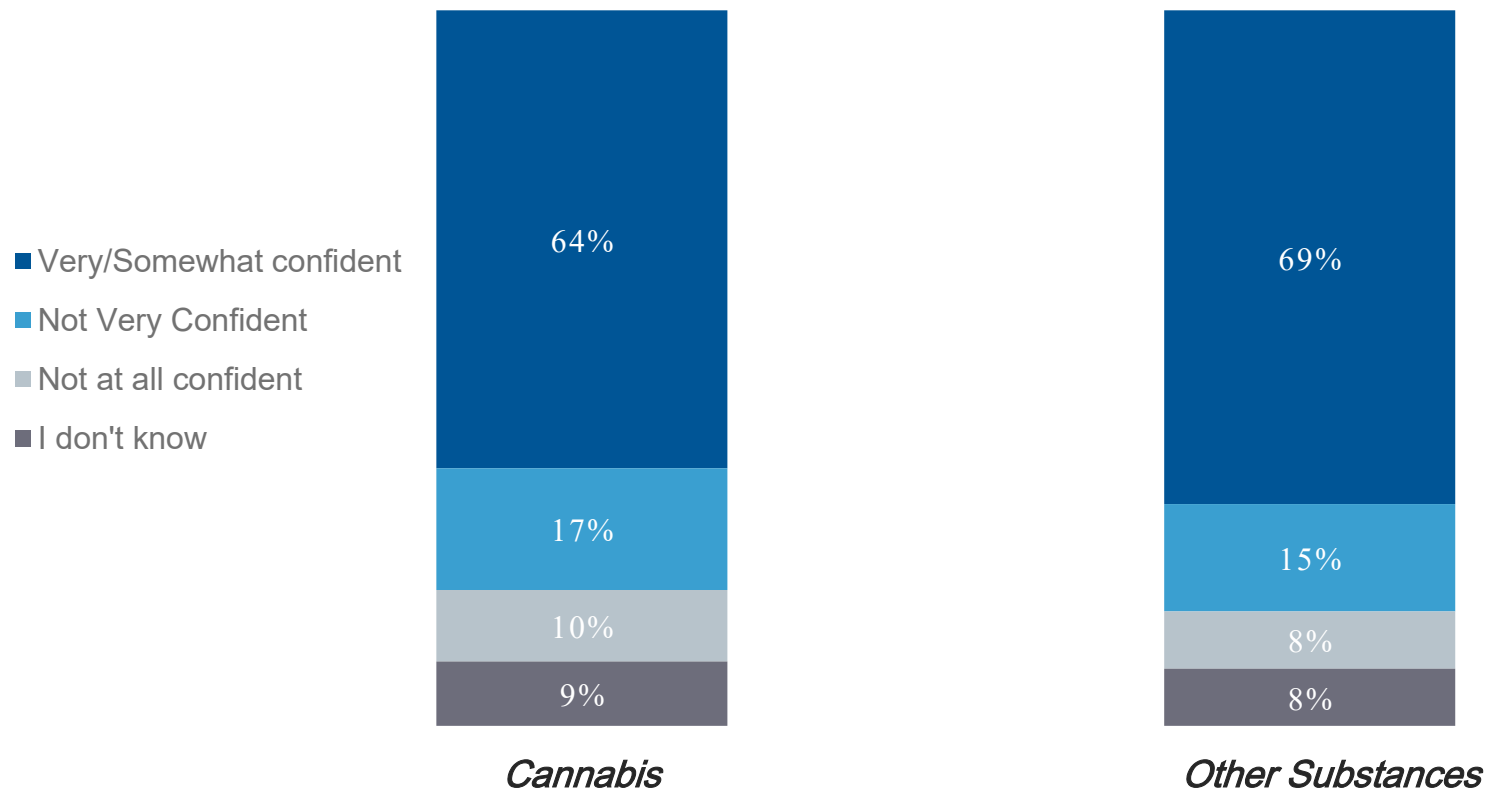
shows statistically significant differences noted

causes impairment? Q14/15. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis?  
Q19/20. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of other substances that cause impairment?

# Employee Procedures Surrounding Suspected Worker Impairment

Over half of employees feel confident about procedures for when worker impairment is suspected regarding both cannabis and other substances. Employees are more likely to be confident with the procedures surrounding other substances.

## Confidence in Procedures Following Suspected Worker Impairment



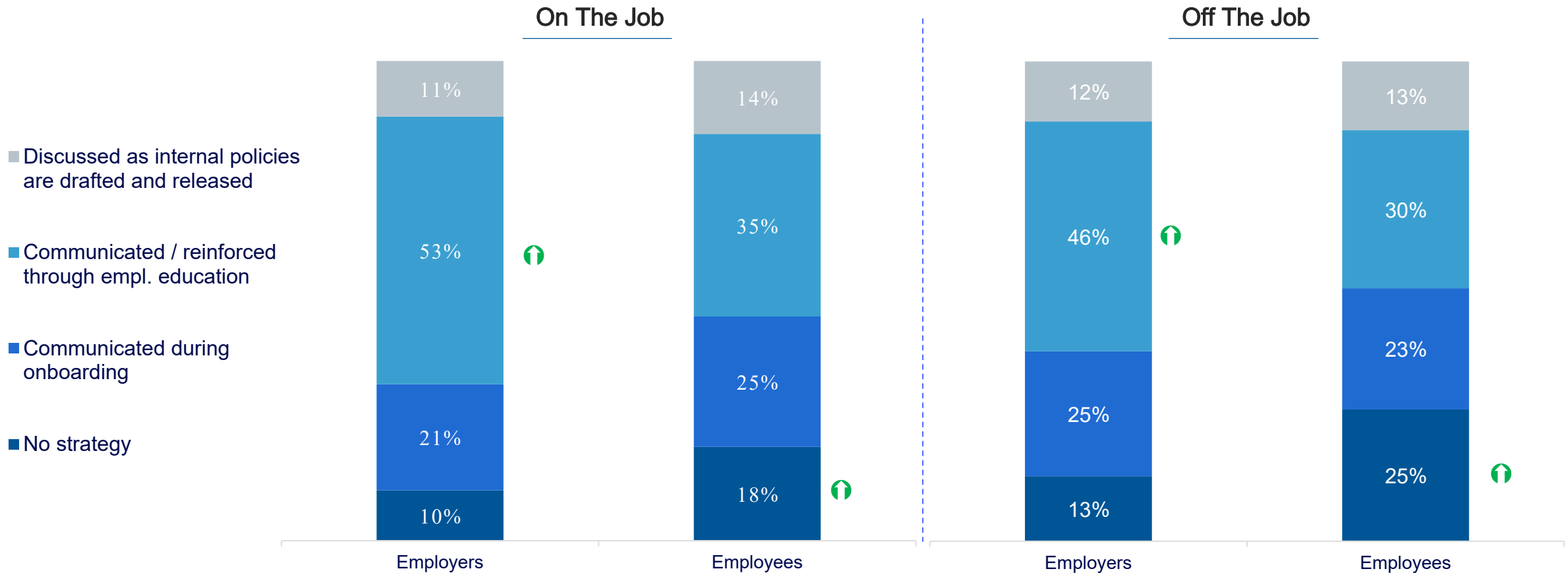
Base: 1,000  
All Employees

Q14/15. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis / substances that cause impairment? Q19/20. Thinking about your workplace, how confident are you that [INSERT STATEMENT] when it comes to usage of cannabis / other substances that cause impairment?

# Communication Of Policies Surrounding Usage Of Medical Cannabis



Employers are more likely than employees to feel their organization regularly communicates and reinforces policies surrounding the usage of medical cannabis both on and off the job, while employees are more likely to indicate no strategy exists around medical cannabis usage.



↑ ↓ shows statistically significant differences noted

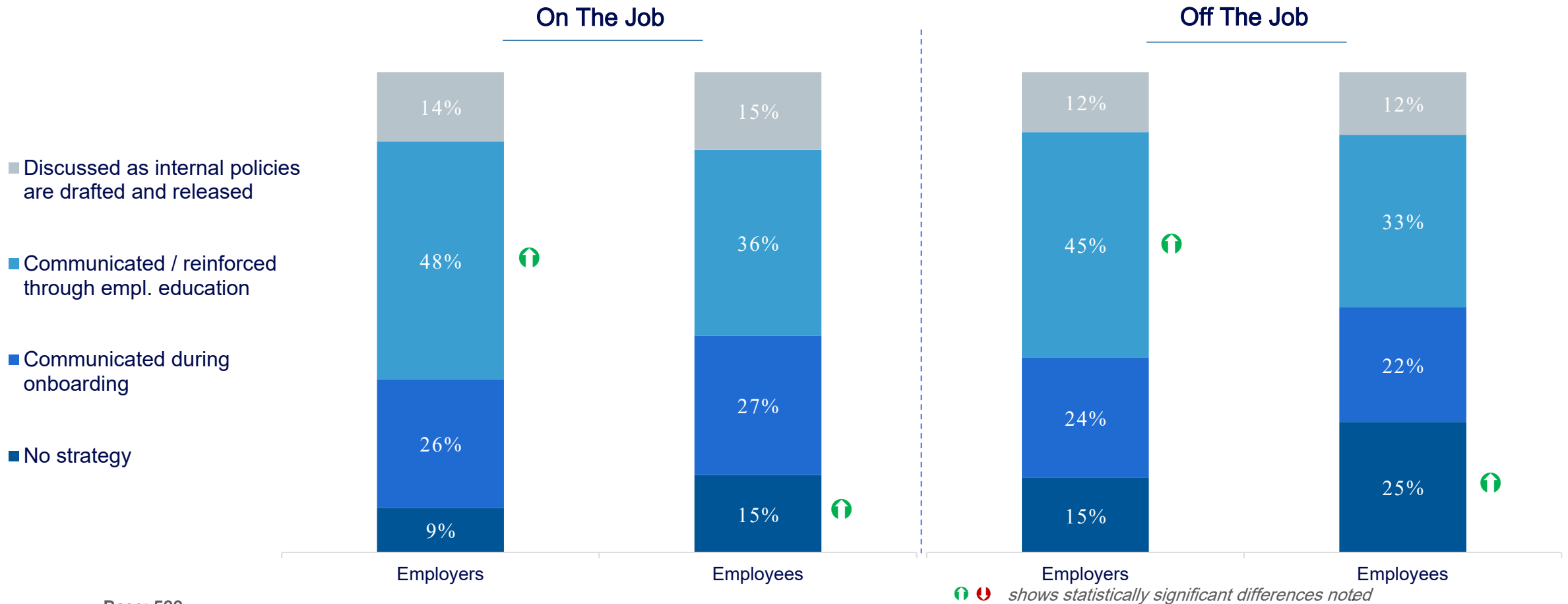
Base: 500  
All Employers  
Base: 1,000  
All Employees

Q16. Which of the following statements best describes your organization's communications strategies around the usage of medical cannabis ... [on the job / off the job]? Q27. Which of the following statements best describes your organization's communications strategies around the usage of medical cannabis ... [on the job / off the job]?

# Communication Of Policies Surrounding Usage Of Recreational Cannabis



Similar to medical cannabis, employers are significantly more likely than employees to feel policies surrounding on job use of recreational cannabis are regularly communicated and reinforced. Employees are more likely to indicate there is no strategy in place for communication surrounding recreational cannabis use.



Base: 500  
 All Employers  
 Base: 1,000  
 All Employees

Q16. Which of the following statements best describes your organization's communications strategies around the usage of recreational cannabis ... [on the job / off the job]? Q27. Which of the following statements best describes your organization's communications strategies around the usage of medical cannabis ... [on the job / off the job]?



# The Majority Of Organizations Require Employees To Disclose If They Are Using Medical Cannabis

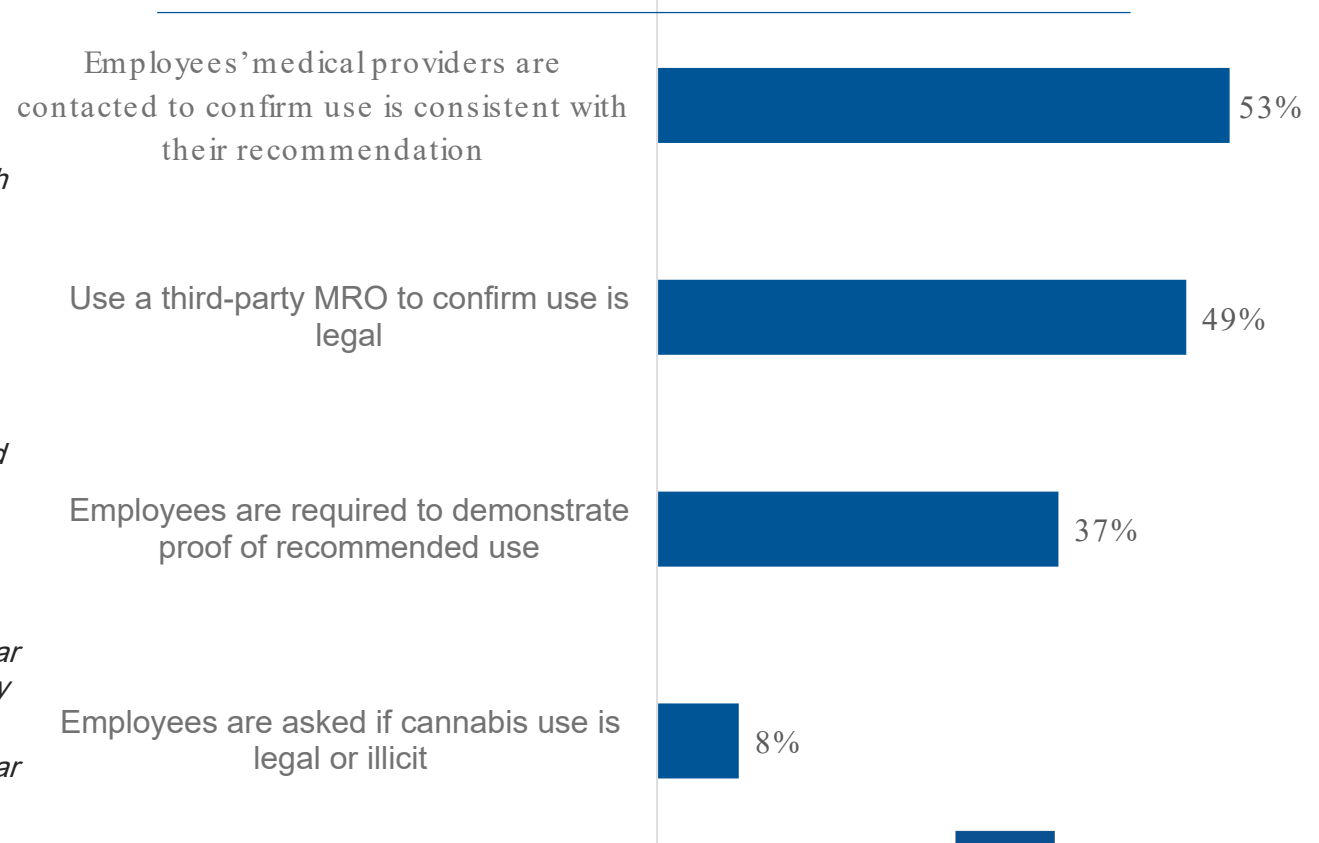
Half of the organizations require employees to disclose if they are taking medical cannabis in all circumstances, while approximately one-third indicate disclosure is required only in specific circumstances. About half of organizations use medical providers or third-party medical review officers to confirm if medical cannabis use is legal or illicit.

## Employee Disclosure Requirements



↑ ↓ shows statistically significant differences noted

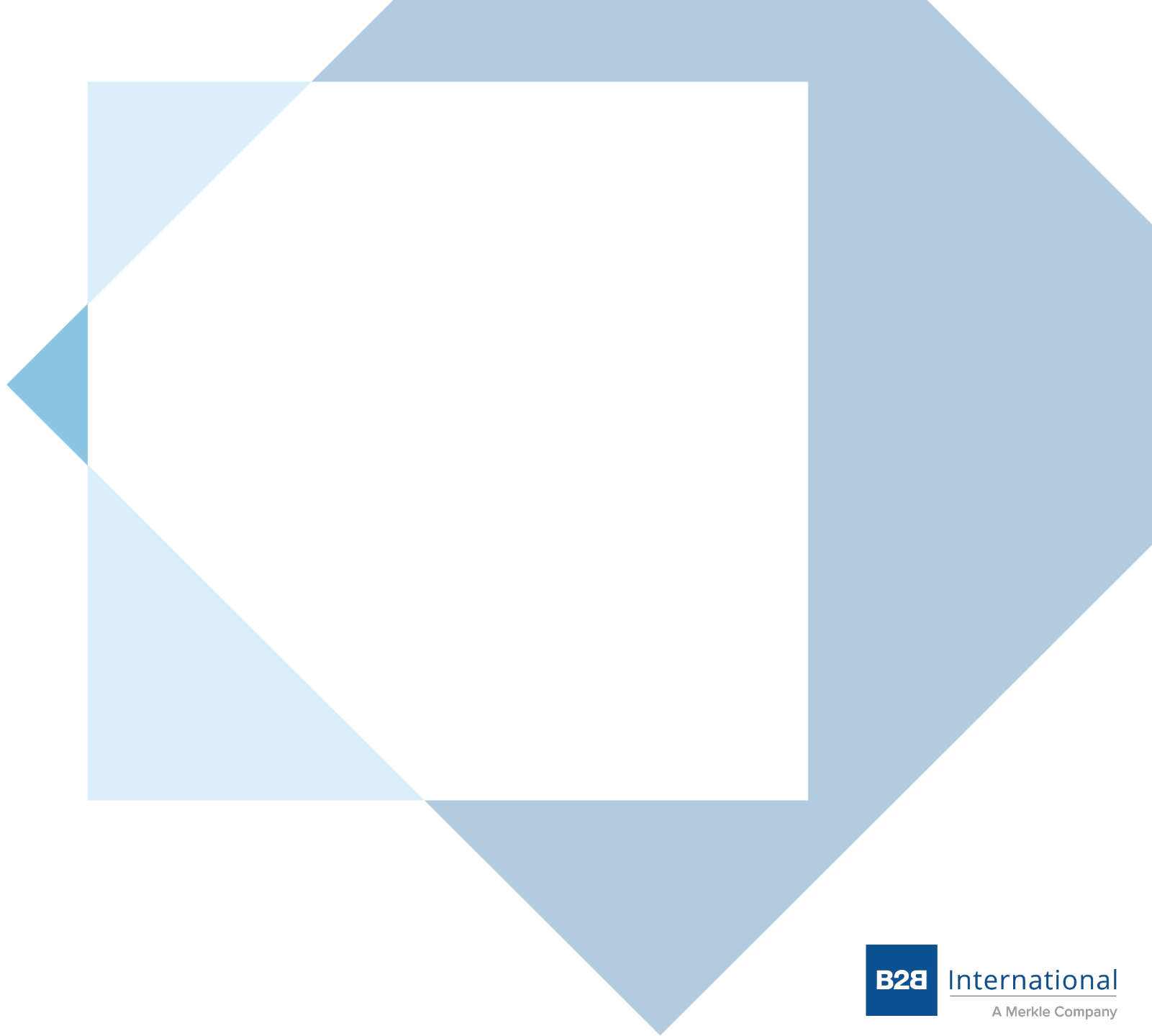
## How Organization Determines Illicit or Legal Usage





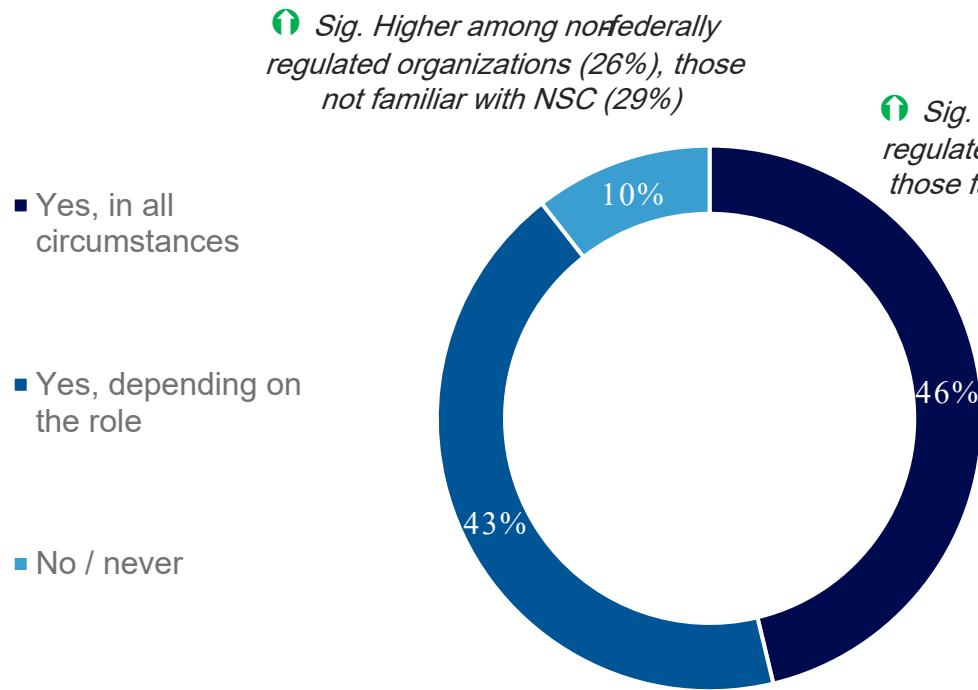


## Testing & Action



# Most Organizations Test Applicants For Potential Cannabis Use But Nearly Half Would Notify The Applicant And Give Them A Chance To Retake The Test Following A Positive Result

## Testing For Cannabis



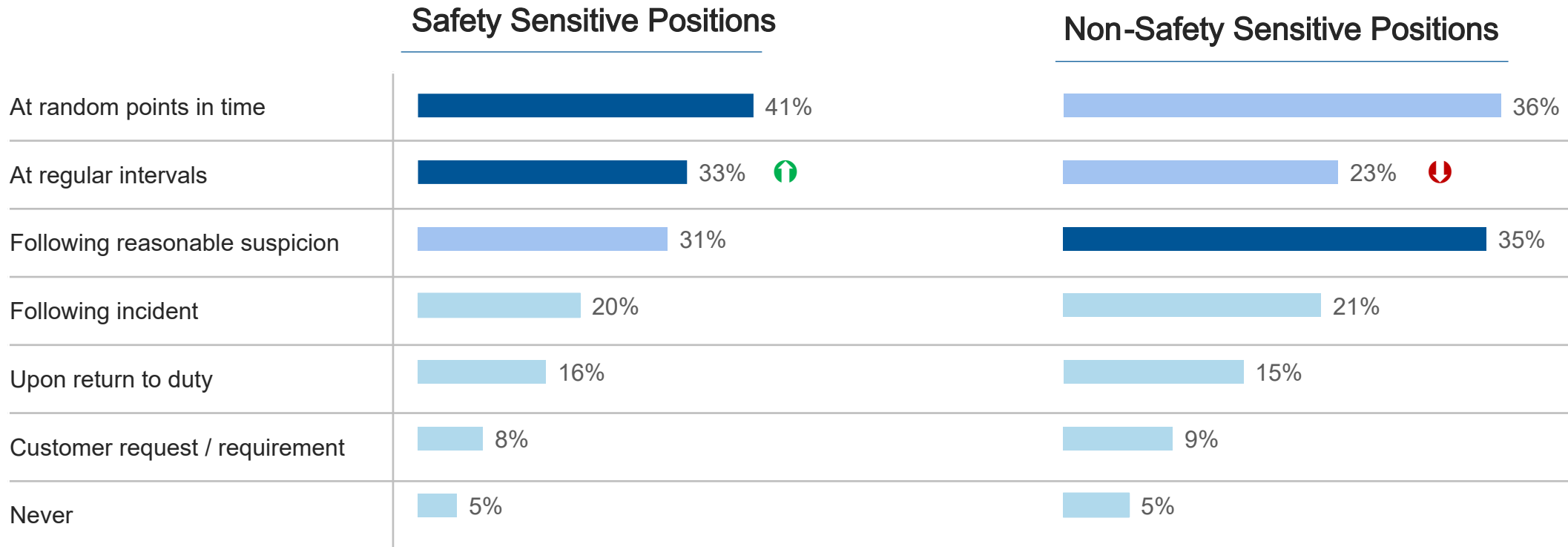
## How Organization Handles Positive Results



**↑ ↓** shows statistically significant differences noted

# Employers Indicate Workers In Safety Sensitive Positions Are Significantly More Likely To Be Tested At Regular Intervals

Directionally, safety sensitive workers are also more likely to be tested at random points in time, while those in non -safety sensitive positions are more likely to be tested only following reasonable suspicion.



  shows statistically significant differences noted

# 8 Of 10 Employers Use Oral Fluid Drug Testing In Some Capacity When Testing For Cannabis

Organizations that are federally regulated and those familiar with NSC are significantly more likely to indicate that oral fluid drug testing is conducted in all circumstances. States in which recreational cannabis is legal are significantly more likely to conduct oral fluid drug testing when testing for cannabis in all circumstances.

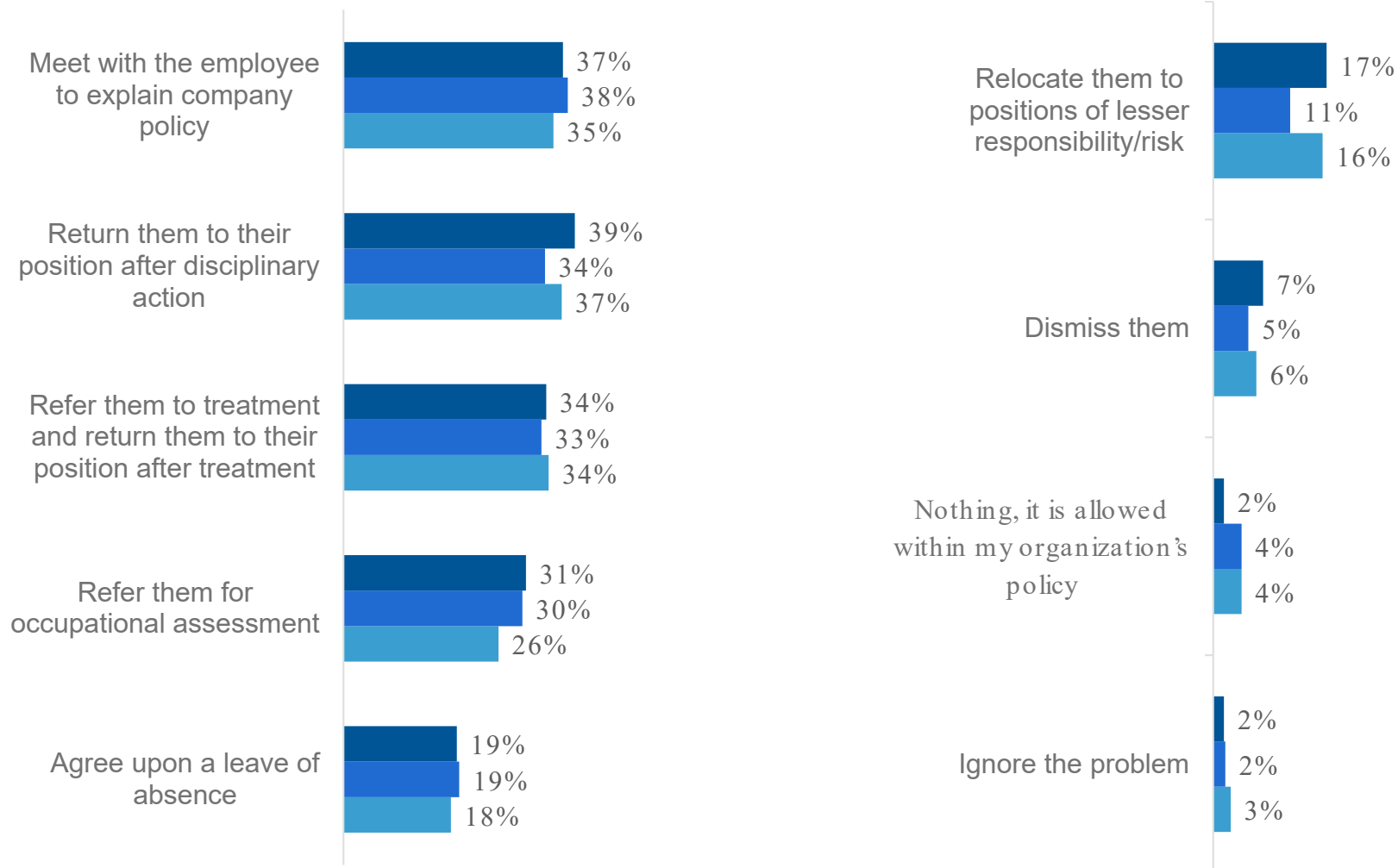
% Conduct Oral Fluid Drug Testing	Overall	Federal Agency Oversight		Familiarity with NSC		Recreationally Legal	
		Federally Regulated	No Federal Regulation	Familiar	Not Familiar	Illegal States	Legal States
	500	378	105	82	310	260	240
Yes, in all circumstances	44%	52%	20%	48%	14%	37%	52%
Yes, only in some circumstances	36%	38%	30%	36%	38%	38%	34%
No / never	17%	8%	48%	14%	39%	23%	11%
Don't know / not sure	3%	1%	3%	2%	9%	2%	3%

*\*No statistical differences with medicinally legal states.*

  Significantly higher   Significantly lower

# Following A First Offense Organizations Are Most Likely To Respond By Explaining The Company Policy And Returning Them To Their Position

- Recreational
- Medical
- CBD products containing THC



Q30. Which of the following would you say best reflects your organization's approach when management has reason to believe an employee is impaired by [INSERT STATEMENT].... During work hours for a first offense?

# Federally Regulated Organizations Are Significantly More Likely To Return Employees To Their Position After Disciplinary Action, Refer Them To Treatment Or Refer Them For Occupational Assessment Following A First Offense

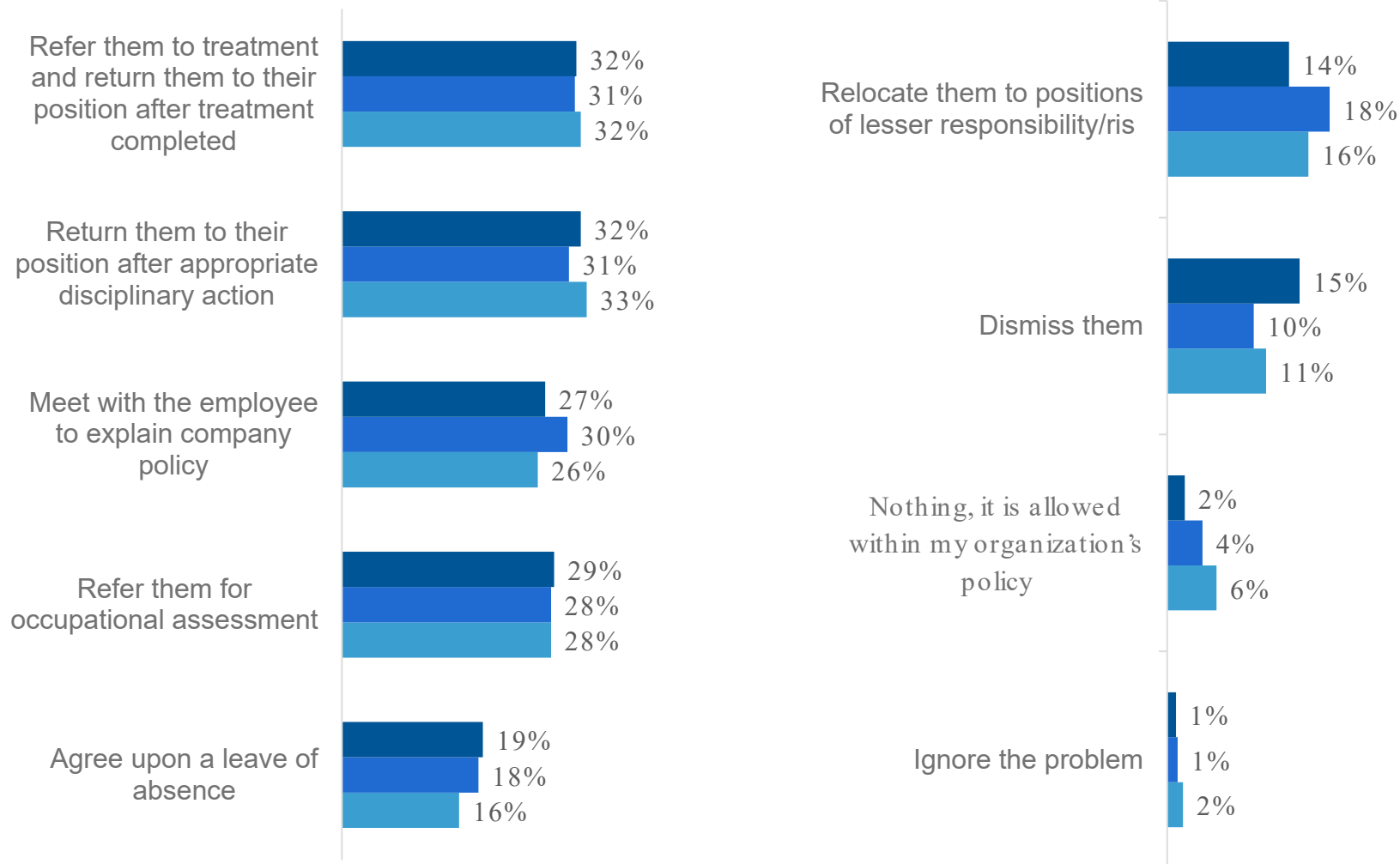
Non-federally regulated organizations are more likely to indicate they would dismiss employees following suspected recreational or CBD impairment.

## *% Attributed To Cannabis*

	Recreational		Medical		CBD Products Containing THC	
	Federally Regulated	No Federal Regulation	Federally Regulated	No Federal Regulation	Federally Regulated	No Federal Regulation
	378	105	378	105	378	105
Meet with the employee to explain company policy	37%	39%	37%	45%	37%	32%
Return them to their position after appropriate disciplinary action	42%	29%	40%	14%	41%	24%
Refer to treatment and return to position after treatment	37%	24%	38%	17%	38%	23%
Refer them for occupational assessment	33%	20%	33%	20%	30%	12%
Agree upon a leave of absence	21%	13%	22%	10%	21%	7%
Relocate them to positions of lesser responsibility/risk	18%	15%	13%	8%	17%	14%
Ignore the problem	2%	1%	2%	2%	3%	2%
Dismiss them	5%	14%	4%	9%	4%	12%
Nothing, it is allowed within my organization's policy	1%	5%	2%	13%	2%	11%

# Following A Repeat Offense, Organizations Are Most Likely To Respond By Referring Employees For Treatment

- Recreational
- Medical
- CBD products containing THC



Q31. Which of the following would you say best reflects your organization's approach when management has reason to believe an employee is impaired by [INSERT STATEMENT].... During work hours for a repeated offense?

# Federally Regulated Organizations Are Significantly More Likely To Return Employees To Their Position After Disciplinary Action And Refer Them To Treatment Following A Repeat Offense

Non-federally regulated organizations are more likely to indicate they would dismiss employees following suspected recreational or CBD impairment.

## % Attributed To Cannabis

	Recreational		Medical		CBD Products Containing THC	
	Federally Regulated	No Federal Regulation	Federally Regulated	No Federal Regulation	Federally Regulated	No Federal Regulation
	378	105	378	105	378	105
Meet with the employee to explain company policy	30%	21%	31%	27%	29%	18%
Refer them for occupational assessment	31%	21%	31%	21%	30%	21%
Return them to their position after appropriate disciplinary action	37%	18%	36%	15%	38%	19%
Agree upon a leave of absence	21%	12%	22%	7%	18%	8%
Refer them to treatment and return them to position after appropriate treatment completed	37%	15%	36%	15%	37%	17%
Relocate them to positions of lesser responsibility / risk	14%	12%	20%	10%	17%	12%
Ignore the problem	0%	2%	1%	3%	2%	3%
Dismiss them	11%	30%	8%	15%	8%	20%
Nothing, it is allowed within my organization's policy	1%	6%	2%	13%	3%	15%



# Around Half Of Companies That Eliminated THC Testing Report Seeing An Increase In Incidents Or Other Workplace Performance Concerns

Federally regulated organizations and those who are familiar with NSC are significantly more likely to report increases. Those in senior management roles or working for large organizations are significantly more likely to report seeing a decrease.



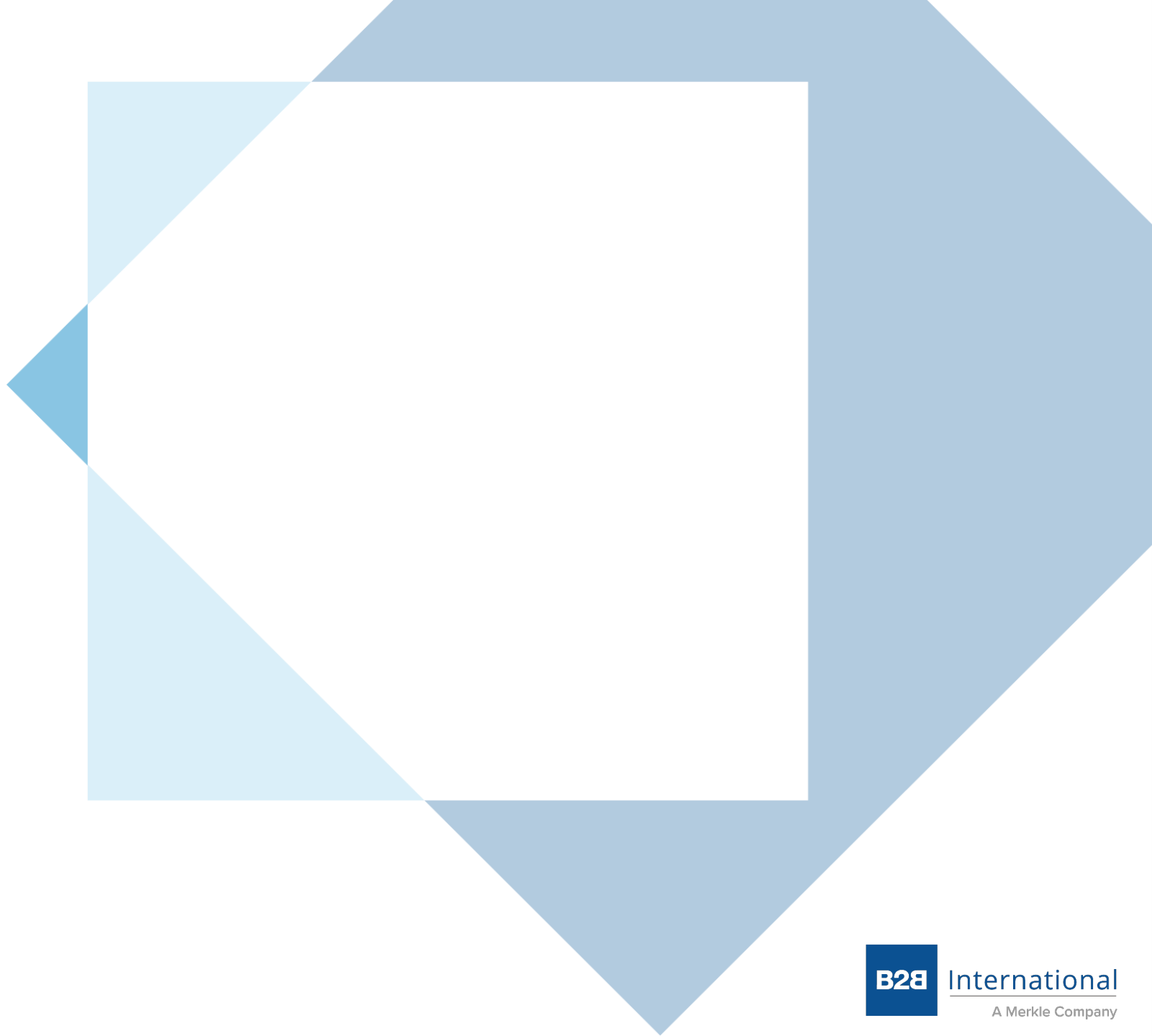
↑ ↓ shows statistically significant differences noted

Base: 225  
Eliminated THC Testing

Q20. To the best of your knowledge, since eliminating THC testing from drug testing panels, has your organization...?



## Perceptions & Barriers Around Cannabis



# Confusion On The Different Types Of Cannabis Use Is A Barrier Faced By About One-Third Of Organizations

% Of Organizations Encountering Barrier	Overall	Use Drug Testing		Federal Agency Oversight		Medicinally Legal		Recreationally Legal	
		Yes, in all circumstances	Yes, depending on the role	Federally Regulated	Not Federally Regulated	Legal State	Illegal/Restricted State	Legal States	Illegal States
	500	228	213	378	105	385	115	240	260
Confusion surrounding differences between recreational, medicinal, and illicit use of cannabis	30%	33%	30%	31%	29%	31%	28%	31%	29%
Private or personal issue in which the employer has no role or responsibility	27%	25%	31%	30%	19%	27%	26%	29%	25%
Lack of expertise	26%	27%	28%	28%	17%	24%	32%	23%	29%
Confusion surrounding the legality of cannabis	26%	27%	26%	26%	27%	26%	25%	26%	25%
Lack of time	20%	21%	22%	22%	12%	19%	24%	19%	21%
Not seen as a priority compared with other issues we are facing	20%	14%	27%	21%	14%	21%	17%	21%	18%
Lack of money	16%	17%	17%	19%	10%	17%	13%	15%	17%
Complexity of multiple office locations and differing state laws*	11%	11%	12%	10%	12%	9%	18%	7%	15%
We have not had to address cannabis use in our workplace	9%	9%	5%	6%	21%	9%	9%	7%	11%
Confusion around medical cannabis and workers compensation	7%	7%	9%	7%	7%	8%	6%	9%	6%

\* Note: This statement was only asked of organizations that indicated they had locations in more than one state.

Significantly higher Significantly lower

# Employers In Safety Roles And Organizations That Have More Than One Location In Different States Are Significantly More Likely To Identify Confusion And Complexity As Barriers

% Of Organizations Encountering Barrier	Overall	Job Role				Sites In...	
		HR	Sr. Mgmt.	Safety	Risk	One State	Multiple States
	500	220	203	55	22*		
Confusion surrounding differences between recreational, medicinal, and illicit use of cannabis	30%	29%	25%	49%	41%	30%	30%
Private or personal issue in which the employer has no role or responsibility	27%	30%	19%	38%	32%	28%	23%
Lack of expertise	26%	27%	21%	33%	41%	27%	23%
Confusion surrounding the legality of cannabis	26%	22%	26%	47%	9%	25%	28%
Lack of time	20%	22%	20%	11%	18%	22%	14%
Not seen as a priority compared with other issues we are facing	20%	21%	15%	31%	18%	22%	13%
Lack of money	16%	20%	11%	11%	32%	19%	8%
Complexity of multiple office locations and differing state laws*	11%	8%	16%	11%	0%	0%	43%
We have not had to address cannabis use in our workplace	9%	7%	12%	4%	9%	9%	8%
Confusion around medical cannabis and workers compensation	7%	5%	10%	7%	9%	7%	8%

\* Note: This statement was only asked of organizations that indicated they had locations in more than one state.

  Significantly higher   Significantly lower

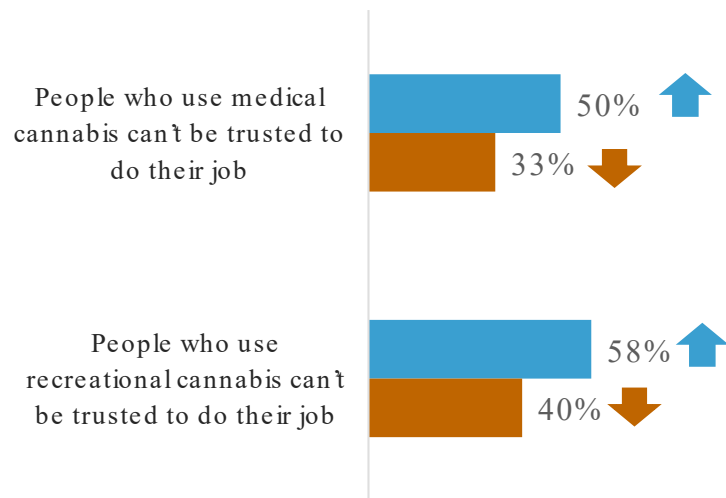
# Views On Recreational/Medical Cannabis Use And Job Performance

Over half of employers indicate low trust for recreational cannabis users and perceive to them underperform as well as be more likely to be impaired at work. At least half of employers have similar views towards medical cannabis users, however, their opinions are less strong when compared to recreational users. Employees are less likely to agree that cannabis users are untrustworthy and underperform at work.

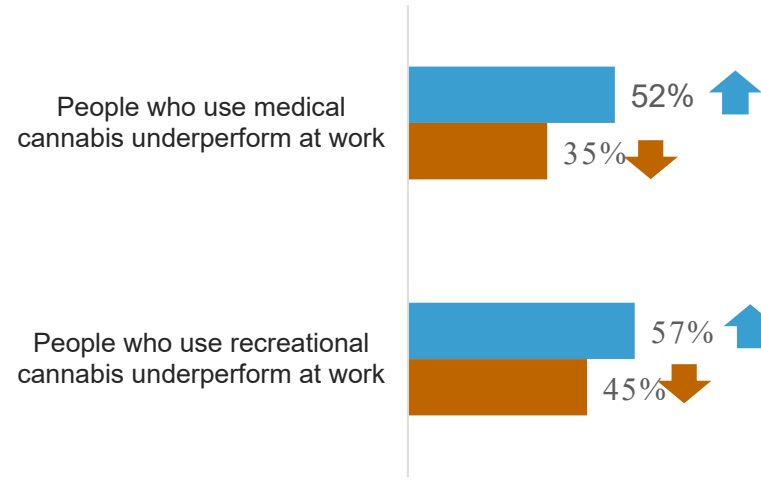


% Agree With Statement  
(Strongly Agree / Somewhat Agree)

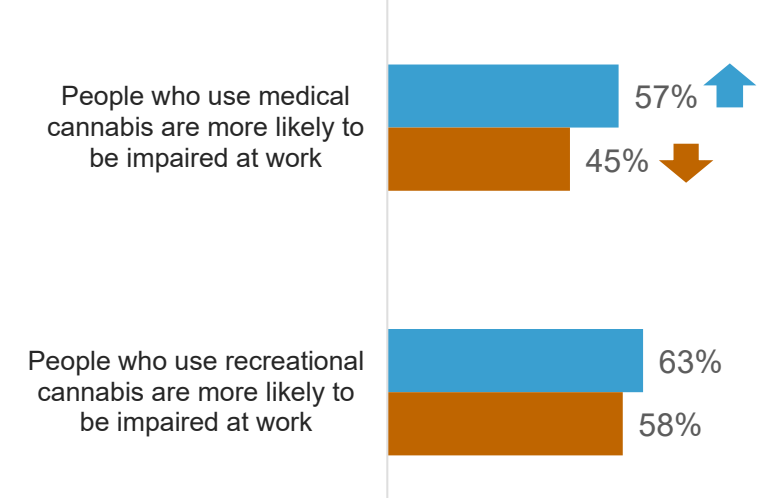
## Trust Perceptions



## Impacts On Performance



## Impairment Perceptions



Base: 500  
All Employers  
Base: 1,000  
All Employees

Employer Employee

↑ ↓ shows statistically significant differences noted

Q34. Please rate your level of agreement with the following statements ... [Employers] Q32. Please indicate your level of agreement with the following statements... [Employees]

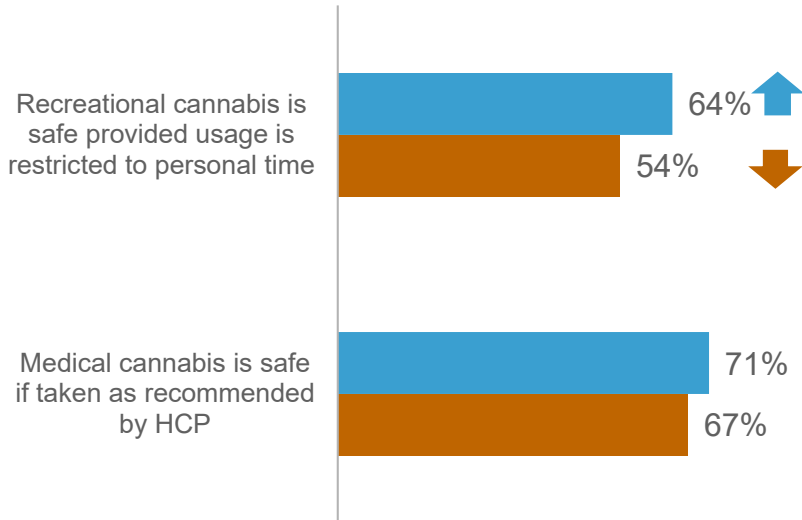
# Attitudes Towards Personal And Health Related Cannabis Usage

Employers are significantly more likely to agree that cannabis use, in any form, makes individuals more creative at work. Employers and employees are closely aligned on several statements surrounding usage of cannabis during personal time. Interestingly, employers are significantly more likely to believe that usage of cannabis makes people more creative at work.

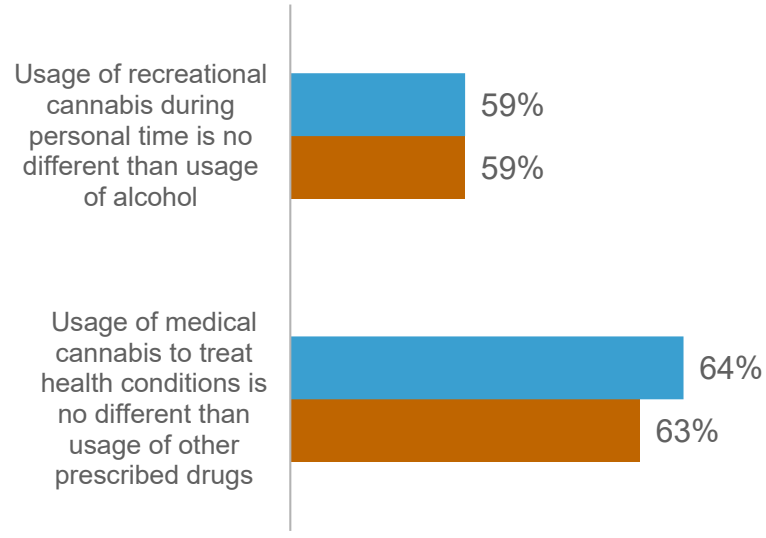


*% Agree With Statement  
(Strongly Agree / Somewhat Agree)*

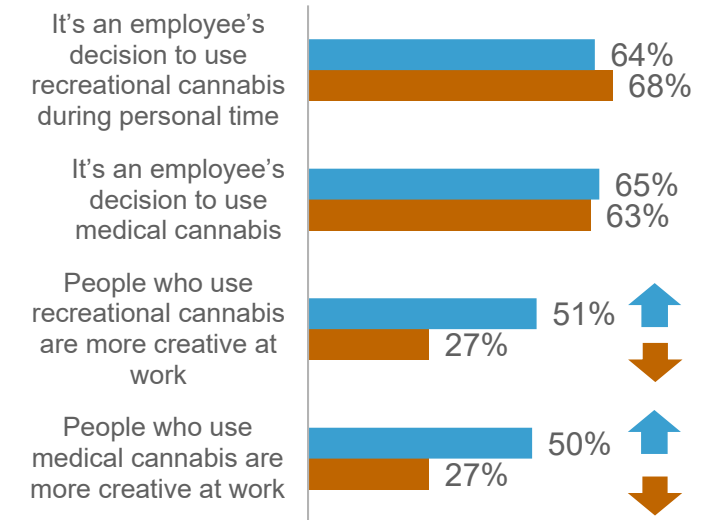
## Safety Perceptions



## Use vs. Other Substances



## Personal Choice & Impacts



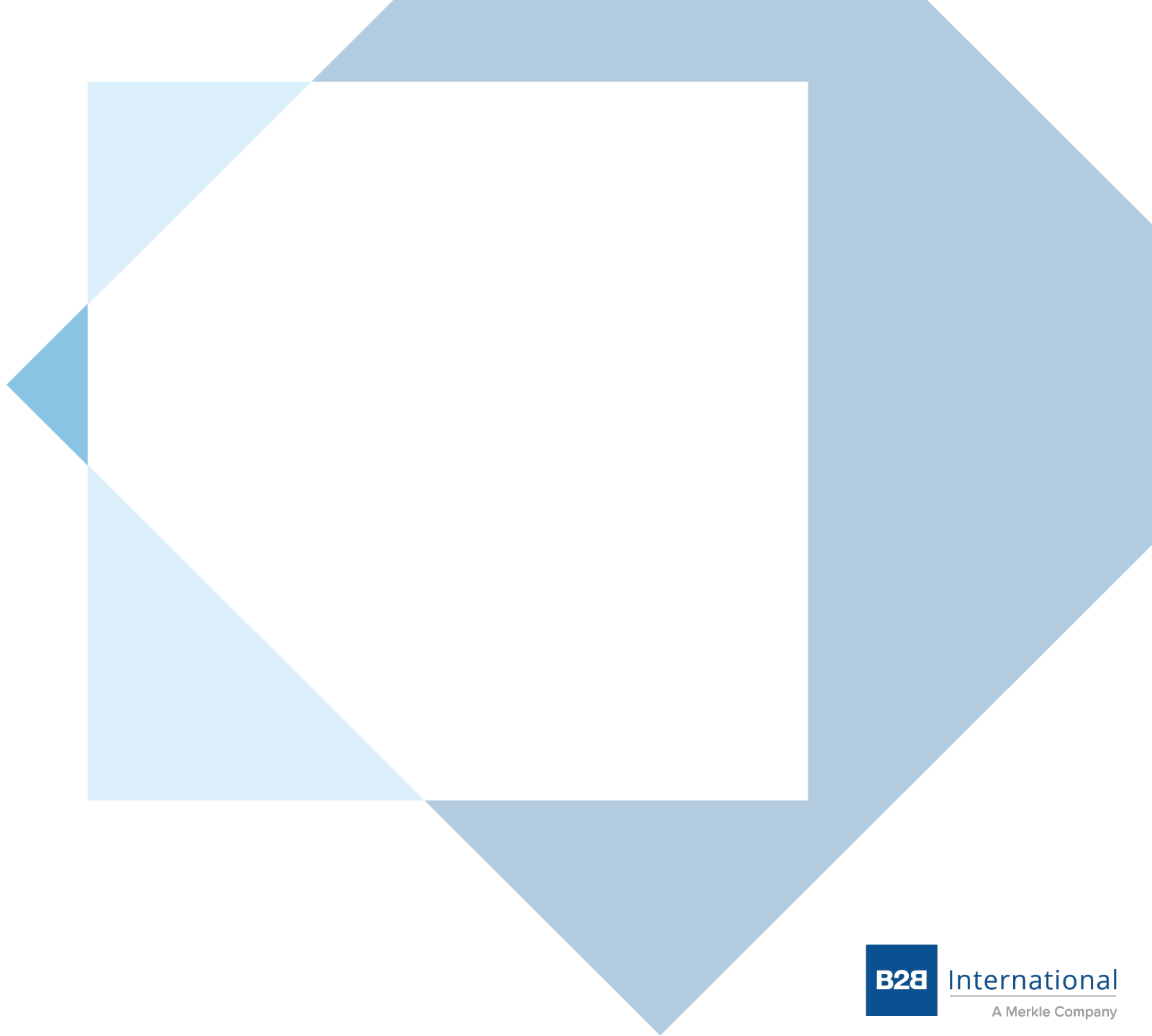
Employer Employee

shows statistically significant differences noted

Q34. Please rate your level of agreement with the following statements ... [Employers] Q32. Please indicate your level of agreement with the following statements... [Employees]

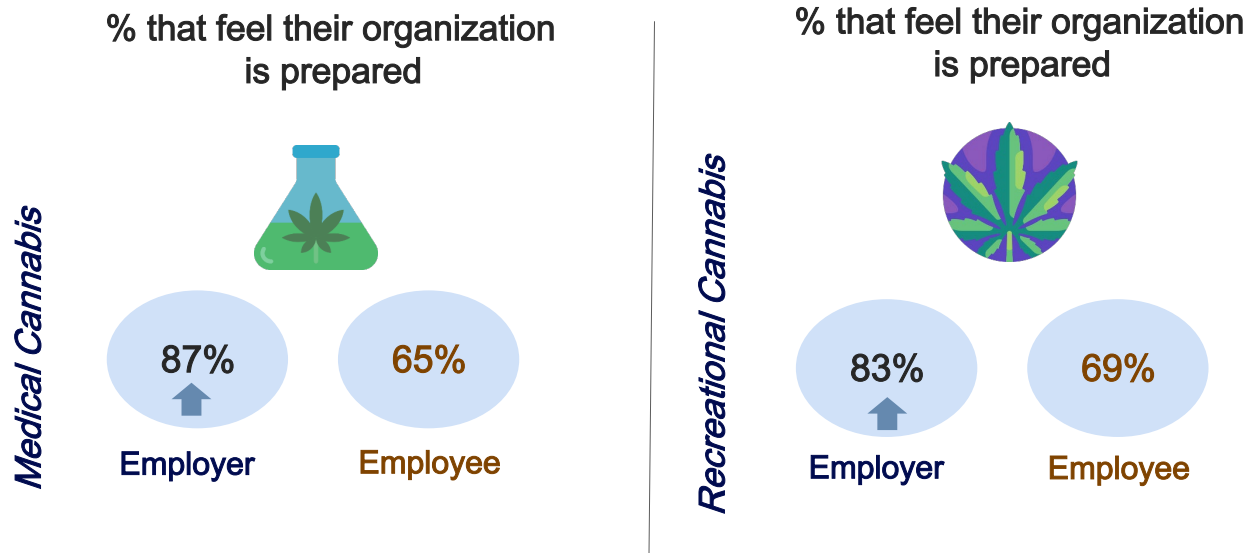


## Key Learnings And Recommendations



# Key Learning: A Gap Between Employer & Employee Perceptions Around Organizational Preparedness And Training About Cannabis Exists

## Perceptions About Workplace Preparedness



## Perceptions About Cannabis Policy Communication

Medical Cannabis	Employers	Employees
• Communicated / reinforced through employee education on the job	53% ↑	35%
• Communicated / reinforced through employee education off the job	46% ↑	30%
Recreational Cannabis	Employers	Employees
• Communicated / reinforced through employee education on the job	48% ↑	36%
• Communicated / reinforced through employee education off the job	45% ↑	33%

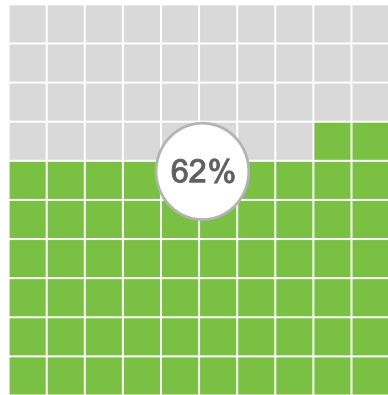
↑ shows statistically significant differences noted.



# Key Learning: Employees Are Less Aware Of Cannabis Policies, Desire More Policy Updates & Clear Communication

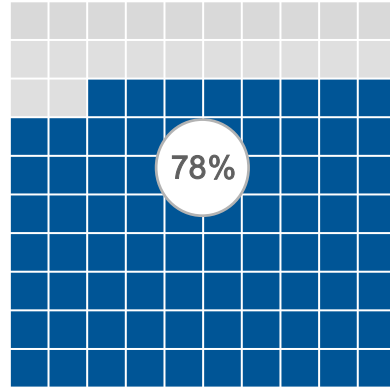
## Awareness Of Company Policies Around Cannabis & Other Substances

62% of employees indicate their company has a policy around cannabis use.



Cannabis

While 78% of employees indicate their organization has a policy around other substance use.



Other Substances

**89%**  
of those are very or somewhat familiar with the policy.

**78%**  
of those feel the policy is fair.

### Top Reasons They Consider Their Company Policy On Cannabis Unfair

- Limitations Of Testing
- Perceived Inequity Compared To Policies Around Other Substances
- No Tolerance Policies & Restrictions on Personal Use

## How Organizations Can Better Inform Employees About Cannabis



19% feel their company is doing a good job informing employees

*"They should revisit the policy more often and communicate policy updates and / or changes to the associates This is especially important with many states working harder to legalize recreational use."*  
-Wholesale Trade

- 14% Desire clear communication
- 4% Would like the policy reviewed




- 7% Would like additional training sessions

28% are unsure of what their company can do to better inform their employees

# Key Learning: When It Comes To Approaches Following Incidents In The Workplace And Responses To State Legalization, Employers Tend To Treat All Types Of Cannabis Similarly

## Top Three Approaches Following A First Offense\*

## Top Three Responses To Legalization Of Cannabis

	Meet With Employee To Explain Company Policy	Return Them To Their Position After Disciplinary Action	Refer Them After Treatment And Return Them To Their Position After	Increase Employee Education	Increase Supervisor Training On Impairment Recog. & Response	Revise Workplace Policies
 Medical Cannabis	38%	34%	33%	73%	67%	67%
 Recreational Cannabis	37%	39%	34%	73%	70%	67%
 CBD Products Containing THC	35%	37%	34%	--	--	--



\* Note: For a Repeat Offense, Employers are most likely to refer for treatment, followed by return them to their position and disciplinary action, followed by meet with employees to explain company policy or refer for occupational assessment, however similar to a first offense, there is little variation amongst cannabis type.

# Key Learning: Organizations With Multiple Locations In Different States Face Increased Complexity And Desire More Support Around Cannabis In The Workplace



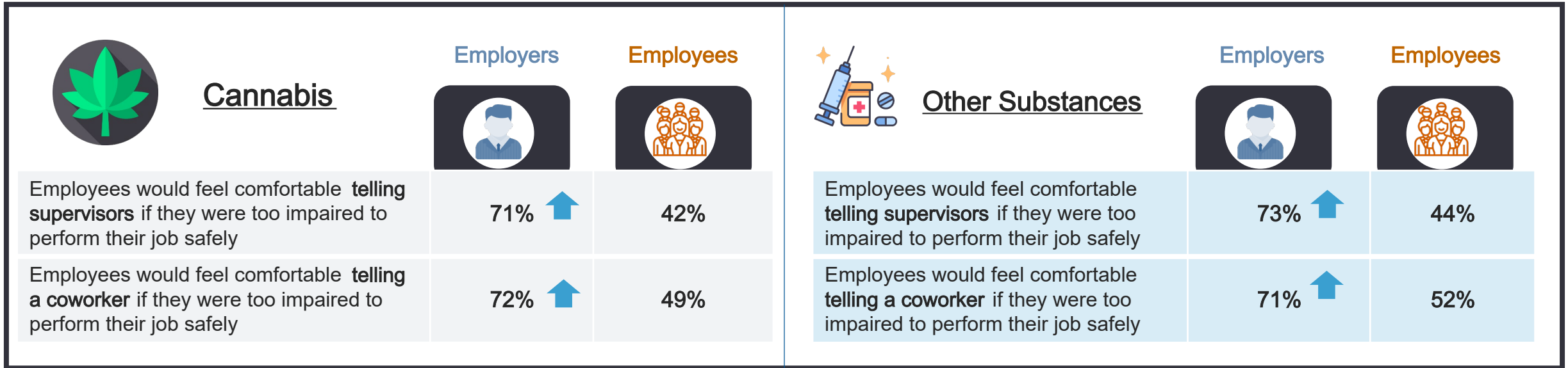
## Complexity Of Multiple Office Locations & Differing State Laws:


- Employers facing the situation where cannabis may be legal in one state they operate in, but illegal in other state(s) are significantly more likely to indicate challenges than employers operating solely in one state.
- Employers with multi-state operations currently working in a medically or recreationally **illegal state** are significantly more likely to agree that their organization is facing challenges with the complexity of differing state laws.

Type of Support Desired from NSC:	Locations/Operations	
	In One State	In Multiple States
Drug Testing Recommendations	24%	34%
Impairment detection technology recommendations	16%	32% 
General Recommendations on Cannabis & Workplace Safety	26%	30%
Impairment Employee Training	24%	30%
Videos or other interactive web tools	13%	28% 

  shows statistically significant differences noted

# Key Learning: Employers Need A Strategy For Increasing Employee Communication Around Reporting Impairment In The Workplace



 shows statistically significant differences noted.

# Key Learning: Federally Regulated Organizations And Those Familiar With NSC Have A More Robust Approach To Cannabis In The Workplace

Employers Who Are Federally Regulated And / Or Familiar With NSC Are More Likely To

...

Require employees to disclose if they are using medical cannabis

Test applicants for potential cannabis use

Conduct oral fluid drug testing in all circumstances

Report seeing an increase in incidents following elimination of THC testing

Attribute workplace injury and heavy equipment crashes to cannabis use

Employers working in **Human Resources** and **Safety** functions report more concerns about cannabis in the workplace than **Senior Management**.

# Key Learning: Targeted Communications Directed At Employees In Non-Safety Sensitive Positions and Cannabis Users Are Needed To Inform Attitudes & Behaviors Around Cannabis In The Workplace

## Employees In Safety Sensitive Positions

Increasingly Likely To

## Cannabis Users



Employees working in **construction** express more interest in receiving information and training around cannabis safety from NSC.

They are also significantly more likely to report having **observed employees use and / or share cannabis and CBD products during work hours** .

Observe usage of cannabis and CBD products during work hours

Be aware that products can contain or lack THC

Feel their organization is well-prepared to address cannabis

View frequent or occasional cannabis use as acceptable

Perceive cannabis usage as less harmful to one's health

Perceive cannabis usage as less risky

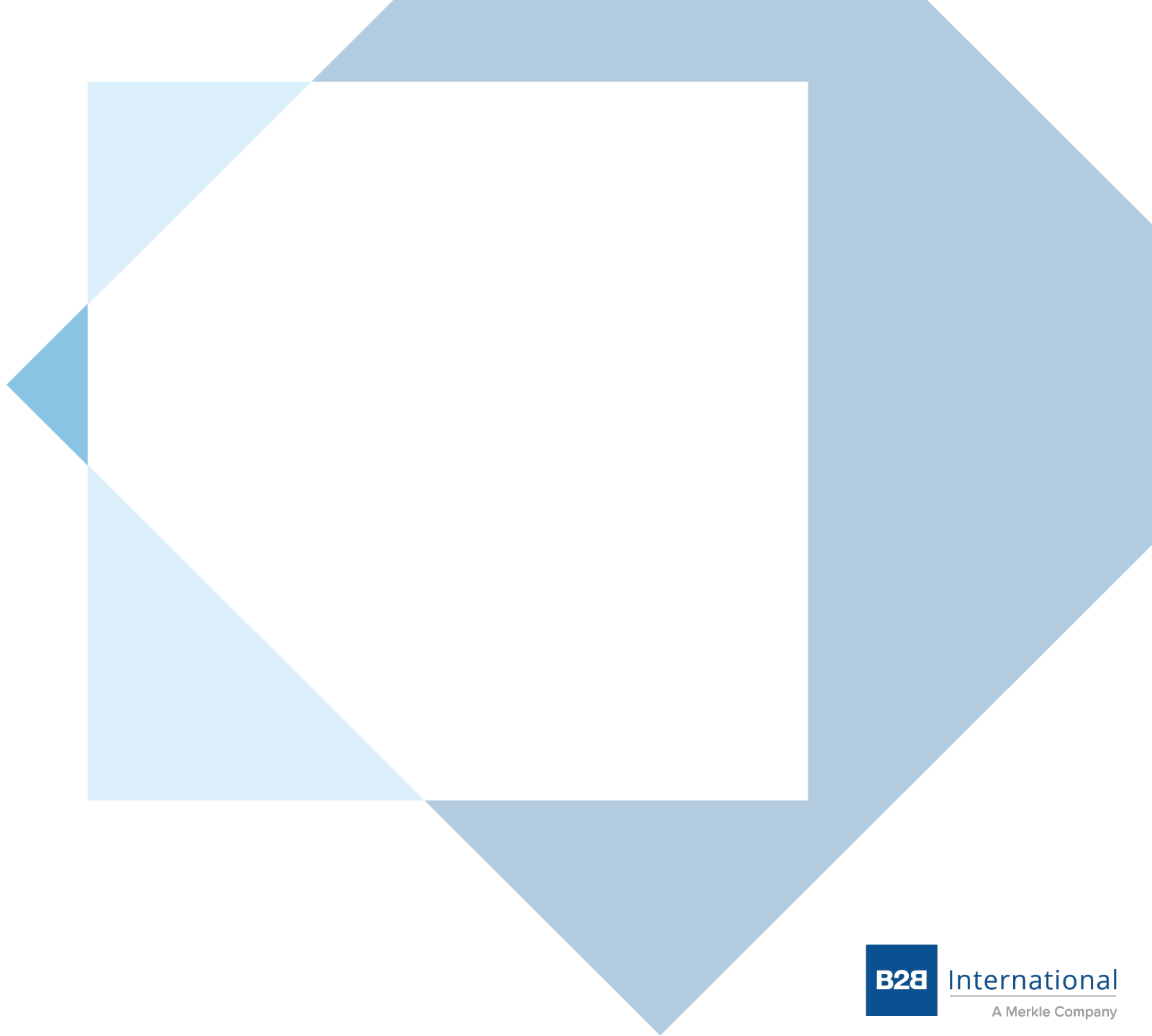
Perceive cannabis usage as not being impairing at work

Observe usage of cannabis and CBD products during work hours

Be aware that cannabis can contain or lack THC






# Appendix





# Employees Working In Utilities And Mining Are More Likely To Have Cannabis Policies In Place

Smaller organizations with under 100 employees are significantly less likely to have a policy in place, likely due to not having experienced a need for a policy.

% That Have A Policy Regarding Cannabis	Overall	Industry						Organization Size			
		Agriculture	Construction	Manufacturing	Mining	Transportation	Utilities	Wholesale Trade	Small	Medium	Large
	1,000	85	255	265	24*	160	129	82	171	480	349
Yes	 62%	52%	65%	57%	<b>75%</b>	63%	<b>74%</b>	57%	54%	<b>63%</b>	<b>65%</b>
No	 23%	32%	25%	22%	25%	20%	14%	24%	33%	23%	18%
Don't Know	 15%	16%	9%	21%	0%	17%	12%	18%	13%	14%	17%




**Bold = notably higher** \* Caution Low Base

 Significantly higher  Significantly lower





# Nearly 8 In 10 Organizations Have Policies Regarding Usage Of Other Substances

Employees in utilities report having a policy regarding other substances more frequently than other industries, while Agriculture is less likely to have policies in place. Those who do not use cannabis products are more uncertain about whether their organization has a policy regarding other substance use.

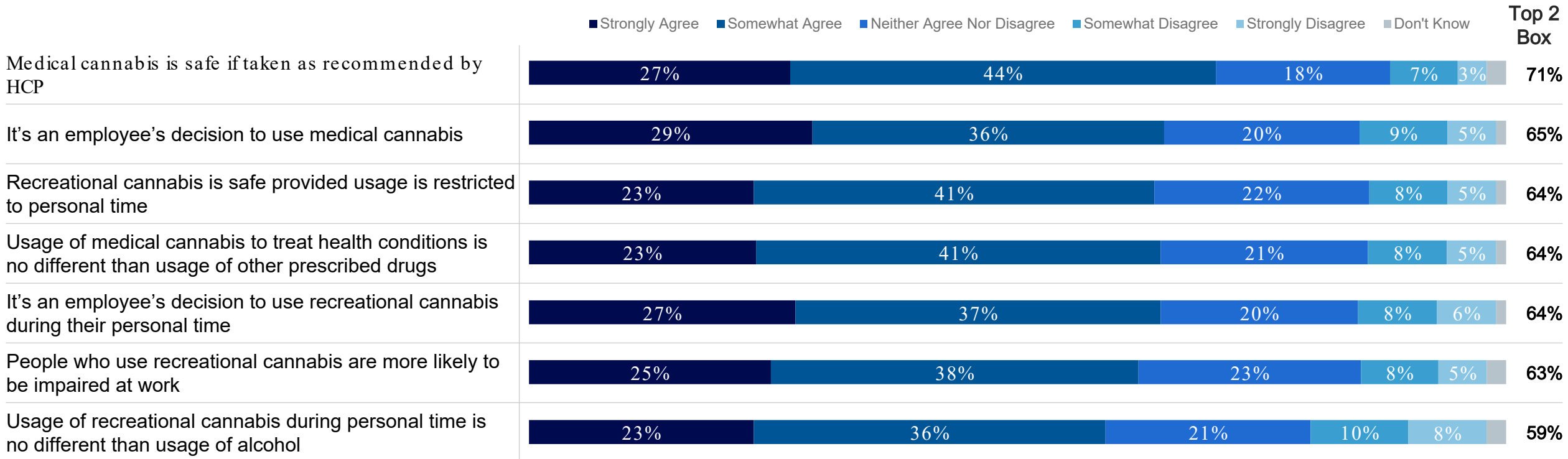
% That Have A Policy Regarding Other Substances	Overall	Industry						Cannabis Product User		
		Agriculture	Construction	Manufacturing	Mining	Transportation	Utilities	Wholesale Trade	User	Non-User
	1,000	85	255	265	24*	160	129	82	475	525
Yes	 78%	62%	75%	79%	75%	84%	88%	73%	79%	77%
No	 14%	24%	21%	10%	21%	9%	7%	16%	16%	13%
Don't Know	 8%	14%	4%	11%	4%	8%	5%	11%	5%	10%

\* Caution Low Base

 Significantly higher  Significantly lower

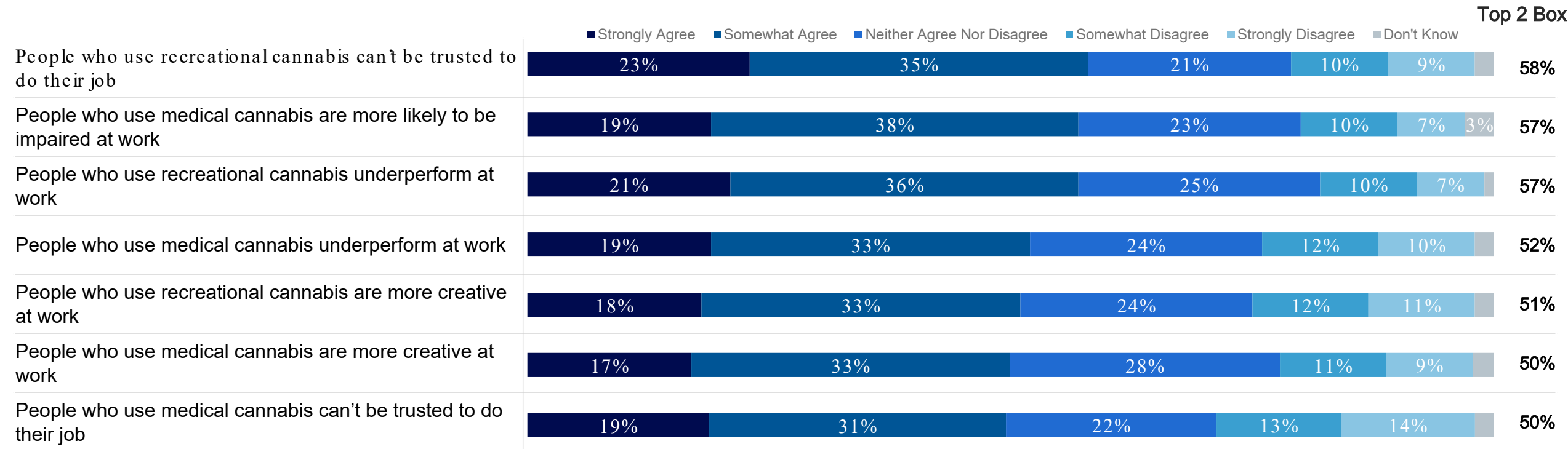
# Employer Attitudes Towards Cannabis Usage (1/2)

7 of 10 employers agree that medical cannabis is safe if recommended by a healthcare professional. Approximately two-thirds agree that it's an employees decision to use medical cannabis and that usage of medical cannabis to treat health conditions is similar to other prescription drugs. Employer agreement with statements related to recreational usage is directionally lower when compared to medical.



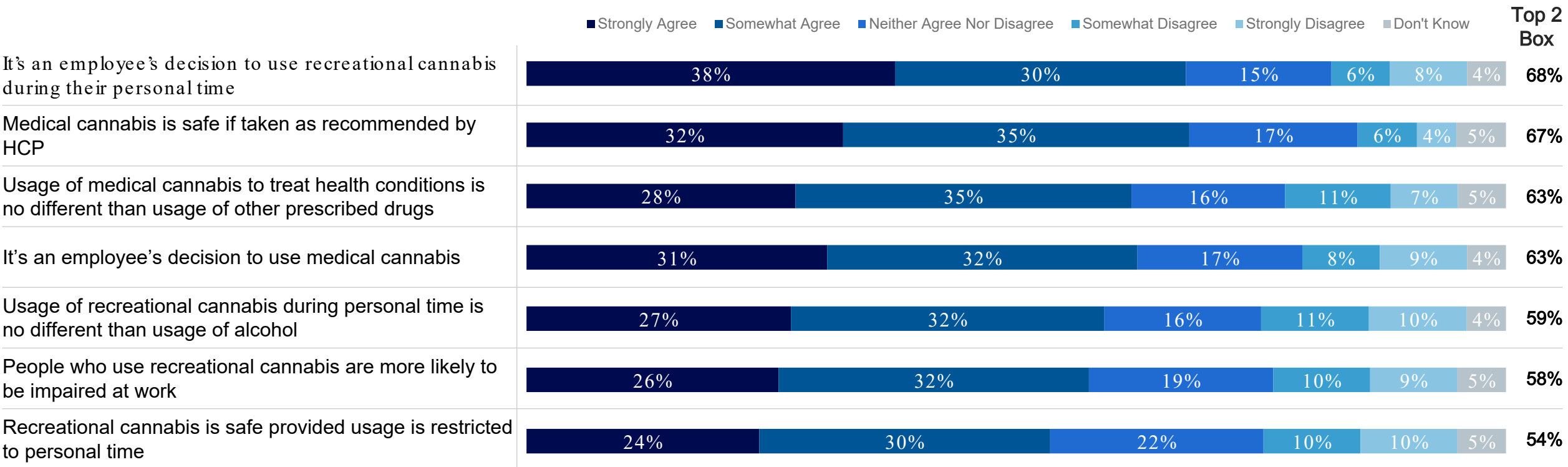
# Employer Attitudes Towards Cannabis Usage (2/2)

Employers believe that cannabis use has negative effects on work. Over half of employers feel that cannabis users underperform, can't be trusted to do their job, and that users are more likely to be impaired at work, especially recreational cannabis users.



# Employee Attitudes Towards Cannabis Usage (1/2)

Nearly 7 out of 10 employees believe that using recreational cannabis during their own time is their decision and medical cannabis is safe if taken as prescribed by a healthcare professional. Approximately 6 of 10 employees perceive recreational cannabis use during personal time as similar to alcohol. Over half of respondents feel recreational cannabis use is safe when use is restricted to personal time.



# Employee Attitudes Towards Cannabis Usage (2/2)

Employees are less likely to agree that cannabis use has a direct impact on job performance. Interestingly, employees largely reject the idea that cannabis users are more creative at work than non-users.

