

2025 UTAH MEDICAL CANNABIS MARKET ANALYSIS SUMMARY OF HIGHLIGHTS

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DISCLOSURES

- This project was conducted as part of a contract with the Utah Department of Health and Human Services and the Utah Department of Agriculture and Food.
- Our team has active grants from the National Institutes on Health, the Centers for Disease Control and Prevention, and Margolis Foundation.
- We have no other conflicts or disclosures.

PRESENTATION OVERVIEW

- Background
- Methods
- Results
- Discussion
 - Key takeaways
- Q and A

BACKGROUND

UTAH MEDICAL CANNABIS

- Utah Medical Cannabis Act approved in 2018
- Nearly 100,000 registered cardholders by April 2025
- \$157M in medical cannabis sales in 2024
- This Market Analysis Survey conducted to evaluate patient experiences and identify participation barriers

METHODS

DESIGN AND PROCEDURE

- Study Design: Cross-sectional survey
- Purpose: Evaluate patient engagement and satisfaction with Utah's medical cannabis program
- Data Collection: Online survey administered via Qualtrics
- Survey Period: November 5 – December 22, 2025
- Ethics: Study classified as exempt by the University of Utah and Utah DHHS IRBs

PARTICIPANTS AND RECRUITMENT

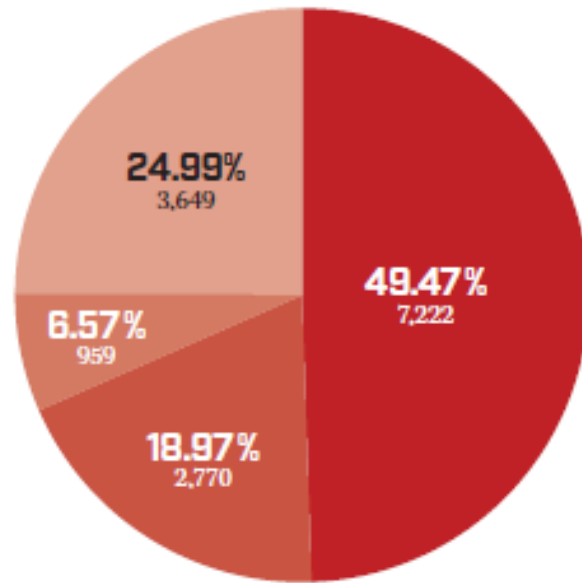
- Eligibility: Adults (18+), medical cannabis program participants, or received care for eligible condition in the U of U Health system
- Recruitment Sources (convenience sample):
 - Utah Center for Medical Cannabis email list (active and expired cardholders)
 - University of Utah Health System patients with qualifying conditions
 - Invitation Reach: >250,000 email invitations sent
 - Additional recruitment through advertisements in medical cannabis pharmacies
- Incentives: Optional raffle (one \$500 and two \$250 gift cards)

SURVEY STRUCTURE AND ANALYSIS

- Survey Groups:
 - Active cardholders
 - Expired cardholders
 - Non-registered cannabis users
 - Non-cannabis individuals with qualifying conditions
- Survey development in collaboration with UDHHS and UDAF
 - Topics Assessed: medical conditions, cannabis use, program experience and satisfaction, barriers, and perceptions of laws
- Data Analysis
 - Data exported from Qualtrics and cleaned prior to analysis
 - Descriptive statistics including frequencies, percentages, and means

RESULTS

SURVEY POPULATION

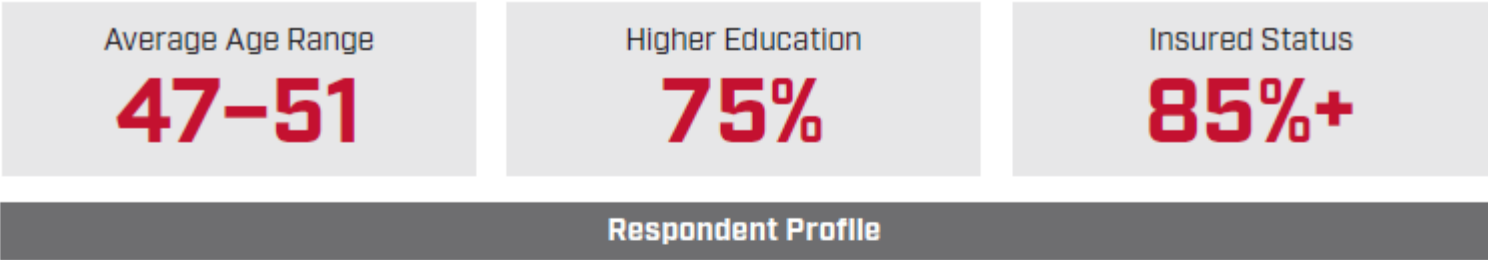


Survey Population

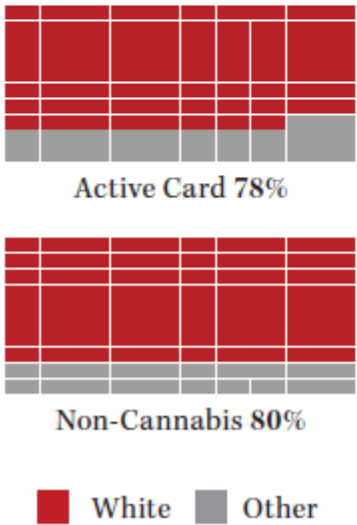
A comprehensive analysis of 14,600 total respondents across four distinct patient categories.

- Active Card
- Expired Card
- Non-Registered
- Non-Cannabis

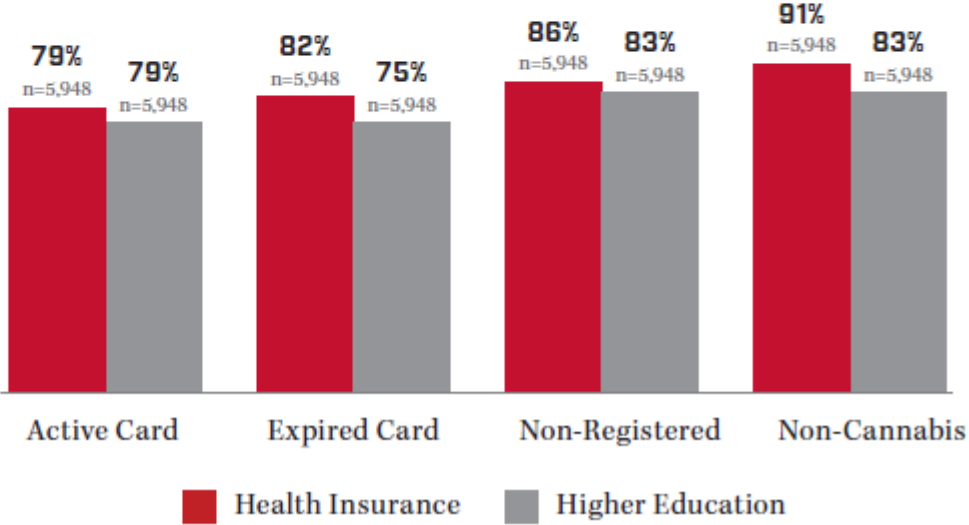
DEMOGRAPHICS OVERVIEW



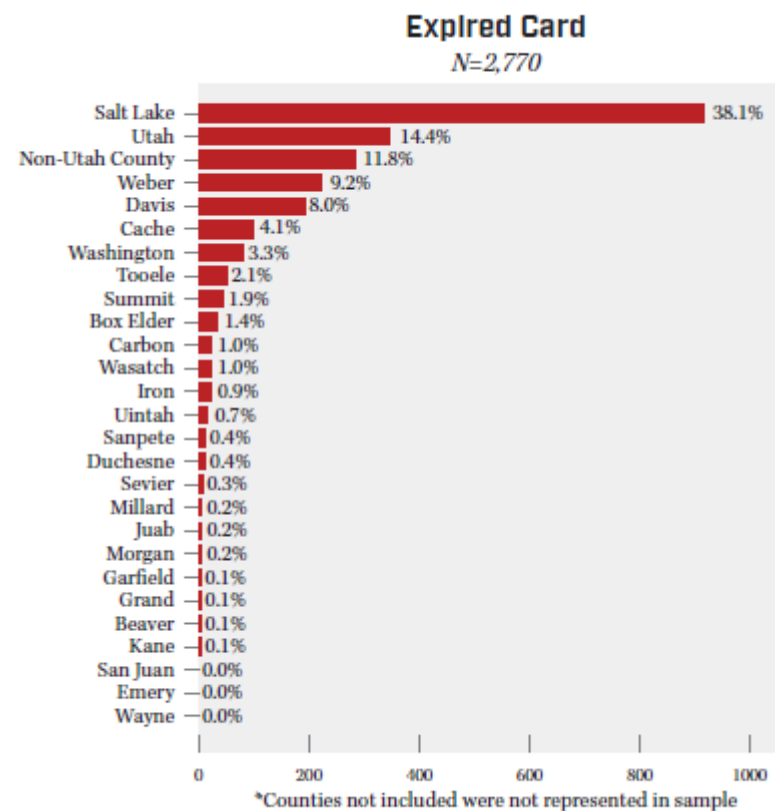
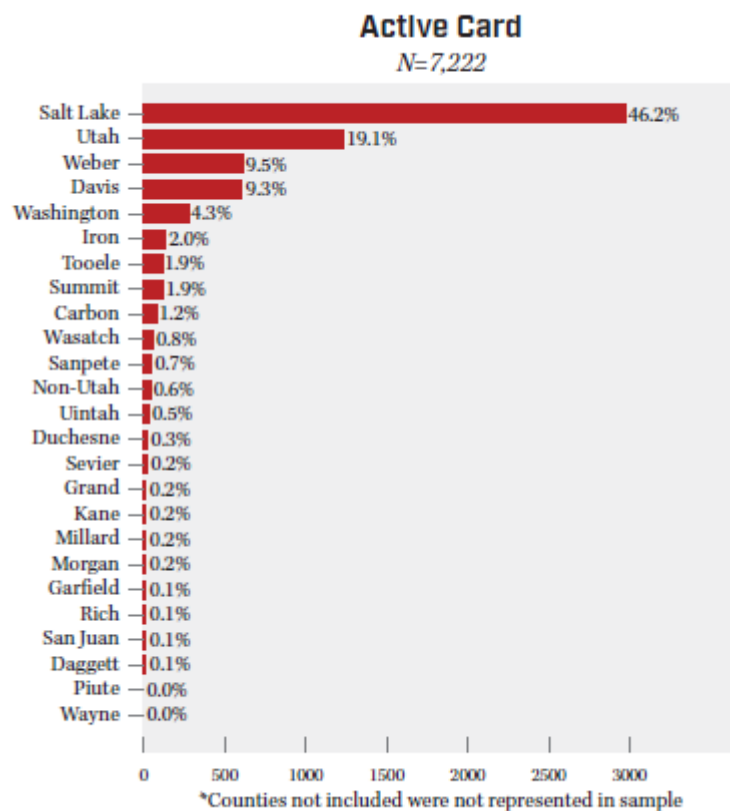
Race & Ethnicity



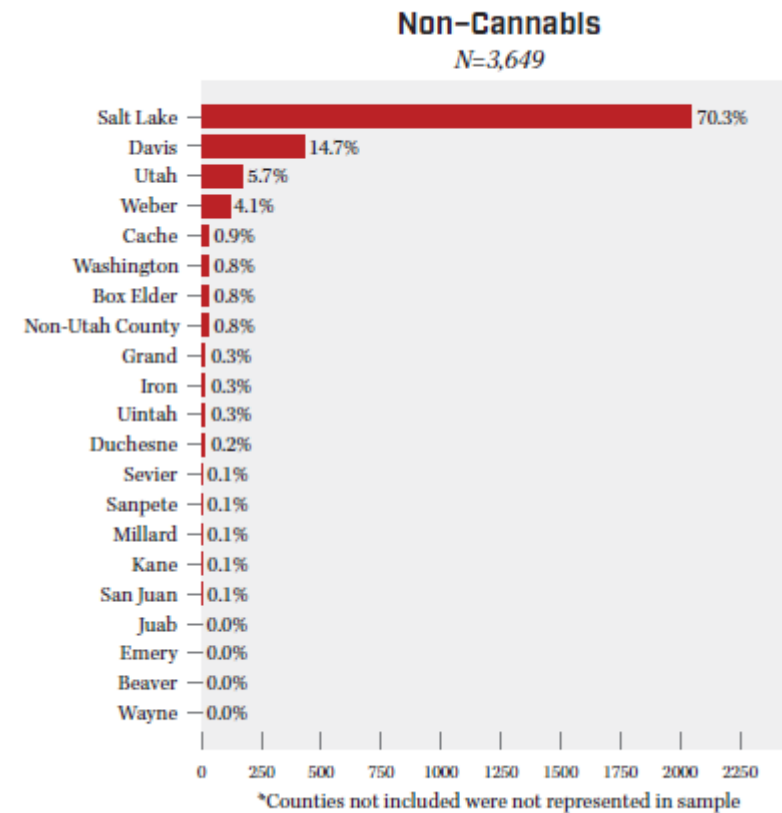
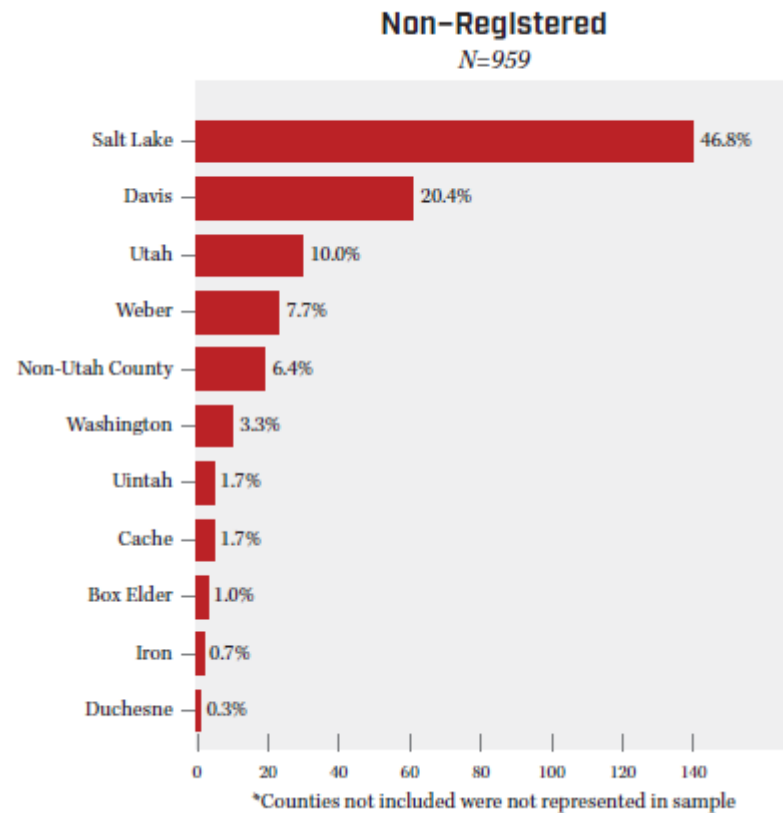
Socio-Economic Indicators



PARTICIPANT RESIDENCY BY COUNTY



PARTICIPANT RESIDENCY BY COUNTY



CONDITIONS TREATED

Rank	Active Card (N=7,222)	%	Expired Card (N=2,770)	%	Non-Registered (N=959)	%
1	Chronic pain	63%	Chronic pain	57%	Insomnia/ sleep problems	57%
2	Anxiety	51%	Anxiety	48%	Anxiety	51%
3	Insomnia/ sleep problems	50%	Insomnia/ sleep problems	44%	Chronic pain	41%
4	Acute pain	47%	Acute pain	43%	Depression	39%
5	Depression	37%	Depression	36%	Acute pain	33%

ACTIVE CARDHOLDERS – TOP FINDINGS

- Daily medical cannabis use reported by 58%
- A few times per week use reported by 23%
- Purchase from Utah medical cannabis pharmacies reported by 93%
- Out-of-state dispensary purchasing reported by 17%

ACTIVE CARDHOLDERS – ACCESS AND SATISFACTION

- Strongly agree pharmacies are accessible: 46%
- Agree pharmacies are accessible: 37%
- Pharmacies often or always have preferred products: 72%
- Product quality rated good or better: 90%

ACTIVE CARDHOLDERS – COST BARRIERS

- Product price often prevents purchases for 34%
- Product price sometimes prevents purchases for 34%
- Product price always prevents purchases for 10%
- Report price never prevents purchases for 9.8%

EXPIRED CARDHOLDERS – TOP FINDINGS

- Still using cannabis medically: 41%
- Did not renew due to product cost: 40%
- Did not renew due to provider visit cost: 33%
- Did not renew due to registration complexity: 16%
- Did not renew due to legal concerns: 14%

EXPIRED CARDHOLDERS – TOP FINDINGS

- Product type restrictions cited by 36%
- Restrictions on transporting cannabis across state lines cited by 33%
- Prohibition on smoking cannabis cited by 32%
- Limits on number of pharmacies cited by 28%
- Prohibition on home cultivation cited by 27%

NON-REGISTERED CANNABIS USE

- Currently use cannabis for their medical condition 75%
 - Weekly or daily use 66%
 - Obtain product out of state 49%
- Barriers to enrolment
 - Costs 25%
 - Lack of program awareness reported by 21%
 - Product cost reported as barrier by 19%
 - Privacy concerns reported by 18%
 - Registration complexity reported by 17%

NON-CANNABIS USE INDIVIDUALS WITH QUALIFYING CONDITIONS – TOP FINDINGS

- Unaware of the medical cannabis program reported by 40%
- Unsure cannabis would help their condition reported by 34%
- Not interested in using cannabis reported by 28%
- Concern about negative physical/mental health effects reported by 21%

CROSS-GROUP FINDINGS

Cost identified as the top barrier across multiple groups



Program awareness gaps reported by eligible patients



Program leakage observed with former patients still using cannabis



High satisfaction with product quality by most active users

DISCUSSION

KEY TAKEAWAYS

1

Daily
therapeutic
reliance among
cardholders

2

High satisfaction
with product
quality

3

Majority
purchase from
Utah
pharmacies

4

Cost barriers
affecting
purchases were
consistent

POLICY PRIORITIES



Address cost barriers affecting of patients



Improve awareness among patients unaware of the program



Simplify enrollment – many cited registration complexity



Address use outside of program

QUESTIONS AND DISCUSSION

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