

What Physicians Don't Know about MMJ is Killing Your Business



Clinical Realities of MMJ for Pain in the USA – Topline Results



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FINDINGS FROM REPORT ISSUED NOVEMBER 2018

Cannalytic Insights collects data about the medical marijuana market. The surveys are designed to provide a better understanding of the attitudes of patients and healthcare professionals toward medical marijuana. In addition, we explore the current informational and logistical hurdles that patients must overcome in order to find the strain and/or method of consumption that best suits their needs.

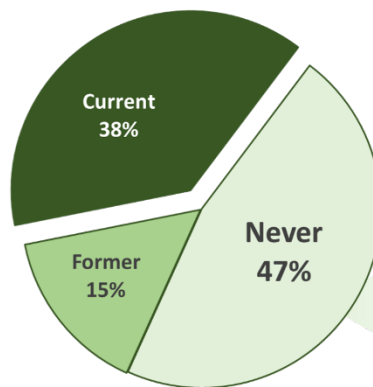
PERCEPTIONS OF MMJ AMONG PAIN SPECIALISTS IN THE USA

The following data was drawn from a survey of 86 Pain Management Specialists (APMs) in states where MMJ is legal.

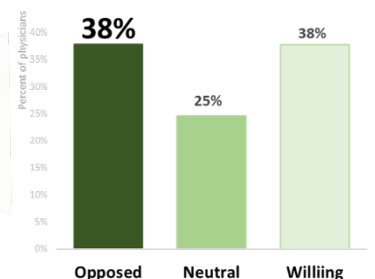
When asked about their history of recommending MMJ to their pain patients, nearly half (47%) of Anesthesiology/Pain Management specialist (APMs) in the United States say they have never done so. This is despite these specialists reporting that they have an average of 21 pain patients per month asking them about the possibility of using MMJ.

Further, among APMs who have yet to prescribe MMJ, 38% say they are currently opposed to using MMJ to treat patients' underlying condition. This resistance continues despite each APM saying that, over the past 3 months, they have had an average of 48 patients come to them admitting to using MMJ in a self-medicating fashion to treat their pain.

Percent of Pain Specialists who are Prescribers of Medical Cannabis



Future Willingness to Rx Medical Cannabis



Who is Cannalytic Insights, LLC?

Cannalytic Insights brings to the medical cannabis field consultants with decades of experience launching and marketing multiple, billion-dollar pharmaceutical brands.

The growing social acceptance of cannabis as a legitimate treatment option for a variety of medical conditions has, to-date, outpaced scientific research and regulatory approval.

For pharmaceuticals, advances are guided by scientific research and regulatory oversight in addressing distinct clinical needs. For medical cannabis, this model has been thrown on its head.

In prescribing pharmaceuticals, physicians will only turn to a drug if they have a clear expectation of the product's efficacy, safety profile, and impact on the patients' lives. While many will admit that they may not have a complete understanding of the mechanisms of action and impact of a drug, they nonetheless assure that their decisions come from a well-established context and are based on sound science.

Conversely, in considering medical cannabis as a legitimate treatment for a patient, most physicians in today's environment are driving blind. As such, physicians are left to relying on anecdotal evidence and a trial-and-error process.

Cannalytic Insights is dedicated to legitimizing cannabis and cannabis extracts for medical use and bridging the gap between the MMJ industry and its consumers and medical professional customers.





Global Marketing Research

- ❖ Over 25 years in pharmaceuticals/medical research
- ❖ Research conducted over product lifecycle
- ❖ Research conducted in 50 countries
- ❖ Qualitative, quantitative, forensic analysis, consulting
- ❖ Methodologies suitable for various healthcare targets

Marketing Consultation

- ❖ Over 30 years in pharma/biotechnology marketing, new product planning, strategy, and analytics
- ❖ Expertise in exploring market gaps and translating data into insights
- ❖ Intellectual curiosity and objectivity resulting in practical recommendations and solutions
- ❖ Hands on “know how” to navigate the course of the business lifecycle

Syndicated Studies

- ❖ Designed to better understand the attitudes of patients and healthcare professionals towards medical marijuana.
- ❖ Current report focuses on Cancer and Pain Management in the USA
- ❖ Future reports to include Canada, Europe, as well as additional medical categories
- ❖ **Ask how you can get your questions in our next survey**

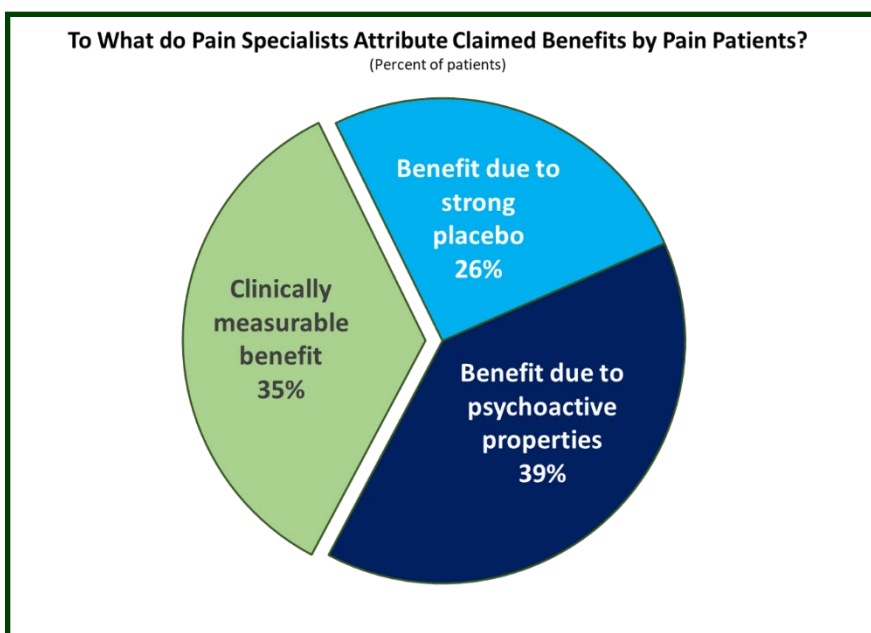
Given the wide-spread problems with opioid dependence and abuse, why are APMs resistant to considering MMJ for their pain patients?

APMs report that among their pain patient using MMJ, over half (53%) tell them they have received a benefit, including 24% reporting benefits that have exceeded their expectations.

In addition, 26% of MMJ-using pain patients report that cannabis has been better than over-the-counter medications they have used, and 23% report that the benefits have been better than prescription medications.

Only 11% of pain patients are described as reporting to their pain management physician unacceptable or serious side effects from using MMJ

Given the apparent enthusiasm pain patients have had toward using MMJ for their pain, APMs remain largely reluctant to widely recommending this treatment approach.



APMs justify their resistance to MMJ by discounting their patients’ experiences.

Lacking clinical trial evidence, APMs must rely on their clinical observations to assess the impact of MMJ on their patients.

When a patient presents to the APM with claims of benefits from MMJ, these physicians are more likely to attribute these benefits to the psychoactive properties of the MMJ or to a “placebo effect”, rather than a clinically measurable benefit.

APMs currently prescribing (or highly willing to prescribe), state they are only able to measure a clinical effect in 39% of their patients who claimed that MMJ is effective.

This is worse in APMs who are currently unwilling to recommend MMJ. These physicians say only 16% of their patients using MMJ (without their consent) have a clinically measurable effect.



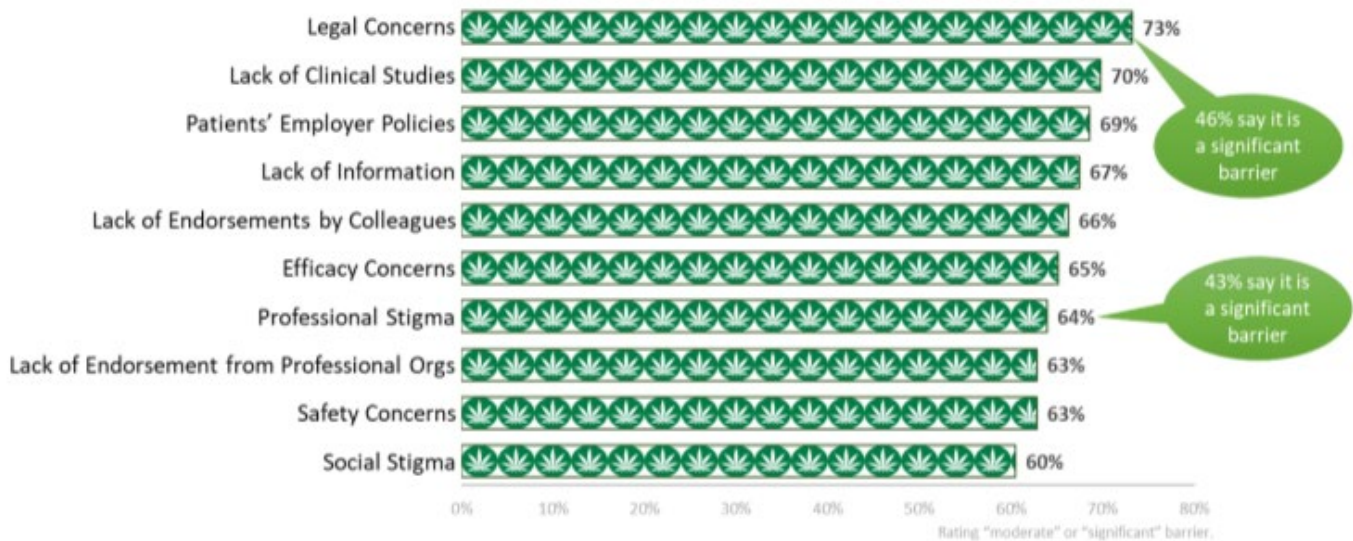
Current MMJ market does not overcome the natural risk-averse approach APMs take to treating patients.

Lack of evidence from compelling, well-controlled clinical trials is a key barrier for 70% of APMs considering MMJ for their patients. Further, professional organizations (e.g., American Academy of Pain Management), have not developed guidelines for when and how to use MMJ for treating pain.

In addition, physicians in the USA, must consider the risk of litigation (e.g., malpractice) should they advocate a product that results in a serious adverse event. As such, 73% of APMs express a concern about litigation if they were to actively encourage use of MMJ, including 46% who say that litigation is a significant barrier.

Further, 63% would not like their colleagues to know that they are encouraging use of an unproven product, with 43% stating they would be perceived by other physicians as “reckless” or “irresponsible”. This too is a significant barrier to their use of MMJ.

Top 10 Barriers to Recommending MMJ for Pain Patients
(Percent of Pain Specialists)



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