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Abstract | Forecasting the nature and form that the Australian illicit drug market will take by the start of 2018 based on the opinions of police detainees - who engage with illicit drug markets as users and suppliers - provides a unique perspective on likely market fluctuations and influences. Police detainees predicted that by the start of 2018 the most likely changes and greatest impacts will occur within the cannabis and methamphetamine markets, with the heroin market remaining relatively stable. Improvements in cultivation technology and the emergence of new cannabis strains were predicted to impact the cannabis market. An increase in the number of injecting methamphetamine users was predicted to have high impact on the methamphetamine market in terms of health and crime costs to the user and community. Predicting market influences supports government, law enforcement and health sectors to proactively develop strategies to address future challenges in the Australian illicit drug market.

Police detainee predictions on future Australian illicit drug market influences

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Background

In 2016, the Australian Institute of Criminology (AIC) undertook research to examine and forecast the future nature and form of the Australian illicit drug market. The research aimed to provide government, law enforcement, and the health sector with a vision of Australian illicit drug markets at the start of 2018 in order to support proactive development of strategies and allocation of resources to meet future challenges. This bulletin summarises police detainees' perspectives on potential influences on the Australian cannabis, methamphetamine and heroin markets by the start of 2018.

The AIC's Drug Use Monitoring in Australia (DUMA) program seeks to measure drug use among people who have recently been apprehended by police (referred to in this paper as detainees). Data were collected via an interviewer-administered survey at Perth, Adelaide and

Brisbane watch-houses and police stations in Sydney – Kings Cross and Bankstown. Participants are referred to in this paper as detainees for ease of reference. It is acknowledged that detainees may or may not have ultimately been charged and convicted. All detainees present during data collection were eligible to participate. Participation was voluntary and confidential.

Data were drawn from two separate data collections conducted over four weeks in July/August 2016 (R1) and four weeks in September/October 2016 (R2). A total of 1,120 detainees were invited to answer the R1 (n=589) and R2 (n=531) surveys. Two hundred and fifty-nine detainees (23%) were in custody at the time of interview on a drug charge (NR1=159; NR2=100). Eight hundred and fifty-eight detainees (77%) self-reported illicit drug use in the last 12 months (NR1=471; NR2=387). This confirms the suitability of the DUMA sample to this research as it comprises individuals with exposure to and engagement with the Australian illicit drug market.

Four hundred and forty-one detainees answered the R1 survey (response rate of 75%) while 421 answered the R2 survey (response rate of 79%). Eighty-two percent (n=708) of detainees across both rounds were male and 67 percent (n=582) were aged between 20 and 39 years.

Detainees were asked to complete the core DUMA survey and a short survey designed for this study. In the R2 survey, a summary of R1 responses was provided so that detainees could consider the opinions of R1 detainees when making predictions. Detainees were also presented with a list of statements relating to the 2018 illicit drug market which were derived from comments made in the R1 survey. Detainees were asked to indicate the likelihood the event would occur (measured on a scale of almost impossible; unlikely; as likely as not; likely; almost certain) and impact the event would have were it to occur (measured on a scale of low; medium; high). Detainees were asked to only respond to items for which they had knowledge of that illicit drug market. This resulted in the number of respondents varying for each item.

Predictions

Prediction 1: Cannabis grow methods will have improved at the start of 2018

Seventy-eight detainees (38%) predicted it was 'likely' that cannabis grow methods will have improved at the start of 2018; a further 30 (14%) predicted it was 'almost certain'. Detainees' stated this was because growers were refining cannabis cultivation methods *'all the time'*. Four detainees stated this improvement would be facilitated by advances in cultivation expertise; for example, through knowledge exchange on grow-methods from other countries such as America or by *'[getting] tips off the internet'*. Technological improvements also contributed to this likelihood as six detainees indicated the quality of the equipment was increasing. Examples of better technology included improved carbon filters and *'cheaper lights, different filtration systems, better pumps'*.

Table 1 Cannabis grow methods will have improved, likelihood and potential impact		
Likelihood	Number	Percent
Almost impossible	6	3
Unlikely	49	24
As likely as not	25	12
Likely	78	37
Almost certain	30	14
Don't know	20	10
Total	208	100
Impact		
Low	46	22
Medium	55	27
High	79	38
Don't know	28	13
Total	208	100

Detainees who predicted it was 'unlikely' (n=49; 24%) or 'almost impossible' (n=6; 3%) that grow methods will have improved at the start of 2018 focused on the current state of cannabis cultivation in Australia. Fourteen detainees stated change was unlikely or impossible because current cultivation methods could not be improved.

Improvements to grow methods were predicted to have a high impact on the cannabis market (n=79; 38%); especially on the quality of cannabis as well as production, supply, demand and availability. Twenty-two detainees linked improvements in grow methods and higher quality cannabis with a decrease in the amount users would need to buy: '*less people will buy because of potency*'; '*wouldn't be buying as much and it would last longer*'; '*can have less cones if the quality is better*'. This predicted change in purchase behaviour was not seen to reflect a reduction in demand, because '*everyone will want [high quality cannabis]*'.

Detainees also predicted improvements would result in faster cultivation timeframes (n=8 of 79; 10%): '*they've gone from growing in 12 months, to 3 months, so anything could happen*'. Faster cultivation was predicted to impact the cannabis market through increased supply and availability (n=15). The influence of this on price was less clear. While some (n=5) predicted price would decrease ('*over supply which would lower price*') others (n=5) stated price would increase ('*stronger product will have people paying more for it*').

Prediction 2: New strains will improve the purity of cannabis at the start of 2018

One hundred and five detainees predicted it was likely (n=76; 37%) or almost certain (n=29; 14%) that new strains will improve the purity of cannabis at the start of 2018. Thirteen detainees stated the creation of new strains is common in the current market. International strains were particularly influential with growers importing seeds or discussing them on the internet. Current growers also cultivate new strains to improve the quality of cannabis or to create a new product, though success

is variable; *'people always try to do different things; if it works it works, if it doesn't it doesn't'*. Two detainees stated new strains were likely if cannabis is legalised for medical purposes.

Table 2 New strains will improve the purity of cannabis, likelihood and potential impact		
Likelihood	Number	Percent
Almost impossible	7	3
Unlikely	39	19
As likely as not	22	0
Likely	76	11
Almost certain	29	14
Don't know	35	17
Total	208	100
Impact		
Low	42	21
Medium	49	24
High	74	39
Don't know	39	36
Total	204	100

Detainees (n=74; 36%) predicted, if successful, new strains of cannabis would have high impact on the market at the start of 2018. The primary reason was the increase in quality and resulting popularity: *'it is all about who has the best pot and you get the most customers'*; *'different variety, different people want to try different things, particularly if it is good'*; *'it will be more popular if it is more potent; it will be more sought after'*.

Prediction 3: Synthetic cannabis will drive down demand for and street price of 'natural' cannabis at the start of 2018

One hundred and forty-three detainees predicted it was 'unlikely' (n=86; 41%) or 'almost impossible' (n=57; 27%) that synthetic cannabinoids will drive down demand for and street price of 'natural' cannabis at the start of 2018. The poor quality of synthetic compared with cannabis was the primary reason for these predictions. Ten detainees described synthetic cannabinoids as *'shit'*, six described it as *'dangerous'*, five as *'fake'* while others stated it was *'horrible'* and *'poison'*.

Table 3 Synthetic cannabis will drive down demand for and street price of ‘natural’ cannabis, likelihood and potential impact

Likelihood	Number	Percent
Almost impossible	57	27
Unlikely	86	41
As likely as not	11	5
Likely	28	14
Almost certain	6	3
Don’t know	20	10
Total	208	100
Impact		
Low	76	37
Medium	36	18
High	60	29
Don’t know	32	16
Total	204	100

Detainees predicted this lack of popularity meant the impact of synthetic cannabinoids on the demand and price of cannabis would be low (n=76; 37%). One detainee stated *‘the only people going for the synthetic stuff are the ice users who would use anything’* while another summarised the potential impact as *‘people die from it so they don’t touch it; no one will buy it’*.

Prediction 4: More users will be injecting methamphetamine at the start of 2018

Sixty-seven detainees (40%) predicted it was ‘likely’ that more users would be injecting methamphetamine at the start of 2018; a further 28 (17%) predicted it was ‘almost certain’. Thirty-two detainees stated injection was an increasingly popular method of administration because of the effect it has on the user: *‘to be honest that’s where you get the rush, that’s what gets people coming, it goes bang and you’re off your face. That’s why it’s quite likely’*. Smoking was more common among new users, but as tolerance increased detainees stated injecting was the only way to achieve and sustain an acceptable high (n=11). Injecting was predicted to increase as more users become habitual: *‘the way you take meth is changing a lot from pipes, orally, through to needles. It no longer works by smoking...so they have to inject to get to feel what they want to feel’*; *‘the people that are trying to smoke it are going to try and find the high again and start shooting it’*. Injecting was also considered *‘cheaper’* and *‘more efficient’* because it required smaller amounts to achieve the same effects as smoking.

Table 4 More users will be injecting methamphetamine, likelihood and potential impact		
Likelihood	Number	Percent
Almost impossible	2	1
Unlikely	34	21
As likely as not	21	13
Likely	67	40
Almost certain	28	17
Don't know	14	8
Total	166	100
Impact		
Low	24	15
Medium	35	22
High	87	53
Don't know	17	10
Total	163	100

Thirty-six detainees (22%) considered it 'unlikely' or 'almost impossible' that more users will be injecting methamphetamine at the start of 2018. These detainees predicted smoking would continue to be the most popular administration method because of the stigma attached to injecting: *'meth is a huge crack smoking scene and these users will look down at injecting drug users'*. Five detainees characterised injecting as a highly stigmatized indicator of more serious and risky methamphetamine use with two stating: *'it's a big step to start injecting and once you start, you can't stop'* and *'young people don't like the stigma...that's how you turn into a junkie'*.

Eighty-seven detainees (53%) predicted more users injecting methamphetamine at the start of 2018 would have a high impact. Injecting methamphetamine was predicted to lead to greater levels of addiction which, in turn, would have serious consequences for the health of the users and society more generally. Fifteen detainees predicted injecting would result in negative consequences for users' physical and mental health, eight predicted an increase in crime and violence and seven predicted harms associated with an increase in discarded and dirty needles.

Prediction 5: Purchasing methamphetamine will be more difficult due to law enforcement efforts by the start of 2018

Sixty-six detainees (40%) predicted it was 'unlikely' purchasing methamphetamine would be more difficult due to law enforcement efforts by the start of 2018; a further 16 predicted it was 'almost impossible'. The current efficacy and ability of the police to respond and regulate the methamphetamine market were the main reasons for these predictions. The police were considered under resourced and under prepared to adequately respond to methamphetamine use: *'too much methamphetamine out there- no way police can take this down'*, *'depends if they hire more cops... If someone gets caught there will be someone to replace them'* and *'what police are finding in raids is a very small percentage of what is out there'*.

Table 5 Purchasing methamphetamine will be more difficult due to law enforcement efforts, likelihood and potential impact

Likelihood	Number	Percent
Almost impossible	16	10
Unlikely	66	40
As likely as not	23	14
Likely	42	26
Almost certain	10	6
Don't know	7	4
Total	164	100
Impact		
Low	60	37
Medium	32	20
High	55	34
Don't know	16	10
Total	163	100

Detainees' opinions were divided as to the impact of law enforcement efforts on the ability to purchase methamphetamine in 2018. Sixty detainees (36%) predicted the impact of law enforcement efforts would be low; however, 55 detainees (33%) predicted the impact would be high. Detainees who considered it to have low impact re-iterated statements of the inability of police to effect change in the market: *'police can't be everywhere at once, so won't stop the meth market'*; *'meth has been around a long time, would just import it. Law enforcement will not have an impact on it'*.

Other detainees predicted, if successful, law enforcement efforts could have a high impact on the market. Availability would reduce resulting in an increase in the price of methamphetamine: *'the rarer the drug becomes, the higher the price'*. While 10 detainees predicted this would be a good thing, four stated it would have negative repercussions for users; specifically, successful law enforcements efforts would cause *'chaos'*, cause users to go *'crazy'* and *'flip out'*.

Prediction 6: The heroin market will be stronger at the start of 2018

Eleven detainees (44%) predicted it was unlikely the heroin market would be stronger at the start of 2018. Reasons for this prediction included the increase in government controls and methadone alternatives and the continued popularity of methamphetamine. One detainee went on to predict *'it may even drop a bit as it has with the downward trends of heroin as people move onto meth and juice [fantasy]'*.

Table 6 The heroin market will be stronger, likelihood and potential impact

Likelihood	Number	Percent
Almost impossible	1	4
Unlikely	11	44
As likely as not	5	20
Likely	8	32
Almost certain	0	0
Don't know	0	0
Total	25	100
Impact		
Low	5	21
Medium	4	17
High	13	54
Don't know	2	8
Total	24	100

Detainees predicted a high impact were the heroin market to strengthen. A stronger market was associated with an increase in the availability, purity and demand. Three detainees predicted heroin-related fatalities would also increase with one stating *'things would be like back in the 90's when it was a major problem'*.

Prediction 7: Methamphetamine users will be switching to heroin at the start of 2018

Fourteen detainees (56%) predicted it was almost impossible (n=8) or unlikely (n=6) methamphetamine users will be switching to heroin at the start of 2018. Three detainees indicated the popularity of methamphetamine was unlikely to change in 2018 with two stating: *'no way! It's the complete opposite...heroin makes you a junkie and sleepy'* and *'it is the opposite way around. Heroin users switch to meth'*.

Table 7 Methamphetamine users will be switching to heroin, likelihood and potential impact

Likelihood	Number	Percent
Almost impossible	8	32
Unlikely	6	24
As likely as not	3	12
Likely	3	12
Almost certain	2	8
Don't know	3	12
Total	25	100
Impact		
Low	8	32
Medium	4	16
High	9	36
Don't know	4	16
Total	25	100

Detainees were split as to the impact that methamphetamine users switching to heroin could have. Nine (36%) predicted high impact; speculating it would result in a decrease in crime (*'I hope so, there will be no crime because everyone will be too stoned'*) and negative outcomes for users (*'meth treats people differently, it messes with your brain. Heroin affects everyone the same. It will mean a higher crime rate and death rate'*). Alternatively, eight detainees (33%) predicted low impact. The primary reason was their belief that it was so unlikely methamphetamine users would switch to heroin that it would have no impact on the market.

Conclusions

Detainees predicted the most likely changes and greatest impact to the Australian illicit drug market by the start of 2018 will occur within the cannabis and methamphetamine markets.

The cannabis market is expected to be impacted by cultivation improvements and the emergence of new strains of cannabis. These two changes were predicted to increase the potency of cannabis. This was predicted by detainees to potentially lead to lower levels of usage – due to the same high being achieved by consuming a smaller quantity – but not a reduction in demand. Availability was predicted to increase with improvements resulting in faster cultivation and potentially higher yields. The impact that this would have on price could not be predicted, as increased availability should, via market forces, lead to a price reduction, but higher potency has historically been linked to a more expensive product.

Detainees predicted that there was likely to be an increase in the number of users injecting methamphetamine at the start of 2018. While detainees predicted this to have a high impact, the impact predicted was not on the market itself but on associated costs to the user and community. Predicted costs included user physical and mental health, exposure to blood borne diseases, crime and violence. An increased rate of injection was reasoned by detainees to occur due to habitual users moving to injection to achieve an ‘acceptable’ high.

Detainees predicted that it was unlikely that the heroin market would strengthen by 2018 or that methamphetamine users would switch to heroin. However, detainees felt that were the heroin market to strengthen, this would have a high impact.

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