

What Cannabis Patients & Consumers Want

4th annual research report from the editors of *Marijuana Business Daily*

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Introduction

A Letter From the Publisher



Welcome to our 100% updated and revised report What Cannabis Patients & Consumers Want, from the publishers of *Marijuana Business Daily*[™]. This book marks the fourth time we've covered this important consumer market data. The information, charts, graphs, analysis and insights in this report are all brand new and a majority of this data has never been analyzed and made available before.

In these past few years the market has grown exponentially, and correspondingly so has the number of patients, consumers, dispensaries, recreational retailers, strains, packaging, consumption techniques and devices, and on and on. As the industry has moved out of the shadows and into the mainstream, retail innovation is flourishing. That trend has led to more unique consumer experiences, more options for consumers and ultimately more competition for those customers.

All of which has led to much more rich data to access, analyze and share.

The What Cannabis Patients & Consumers Want report provides key insights for dispensary owners and recreational retailers to improve their businesses through a deeper understanding of customers, driven by data.

It also provides analysis to help infused product manufacturers in their product development, formulations, packaging design and dosage levels. For growers, it can aid in seeing how consumers make strain choices, how important strain selection is compared to other determining factors, and more. For anyone supplying the growers, retailers or infused products manufacturers, insights through the entire sales or production cycle are often the key to providing the right solutions at the right time.

So in short, this book is for everyone in the cannabis industry.

Sound business decisions are always driven by sound data. I've heard many people in this industry say their goal is to be the McDonald's, Apple, Costco or Starbucks of cannabis. Each of those highly successful businesses created its legacy by leveraging customer insights to meet needs better than the competition.

The data in this report is the result of surveying over 1,600 patients and recreational users

from across the country and across the demographic spectrum, providing a statistically significant sample within a nominal margin of error from which to draw insights.

Marijuana Business Daily is a business-to-business media company, so our reach into the consumer market is limited. Hence, this report would not be possible without a little help from our friends.

Several partner organizations helped us collect data through their broader consumer brand reach. We would like to thank Marijuana Policy Project, Students for Sensible Drug Policy, The Weed Blog, NORML, and Dixie Brands for their help in making this report possible.

Particular thanks is owed to Leafly for allowing our analysts access to anonymous and aggregate data on user demographics, search terms, geocoding data on delivery services, and more from their platform that serves over 1 million registered users. You can find results from our independent analysis of that data in the pages of this report.

We would also like to extend our gratitude to Julianna Carella of Auntie Dolores, Ben Wu at Kush Bottles, Ross Kirsh at Stink Sack, and Ricky Yuan from A&A Packaging Inc. for their valuable insights and data on packaging design.

At *Marijuana Business Daily*, we focus every day on bringing you the best and most unbiased information to help you make sound business decisions. Integrity and Quality are two of our five core values. Our hope and expectation is that this report will help you run your business more successfully, and in turn help move the entire industry forward.

Lastly, if you have suggestions or ideas on future research data, we always appreciate hearing from you. After all, this is your industry benchmark data, developed and designed for your needs. Contact us at editorial@mjbizmedia.com with your suggestions and comments.

Enjoy your report!



George Jage
President & Publisher

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Who's Behind This Report?



Founded in early 2011, *Marijuana Business Daily™* focuses solely on businesses and the investors who back them.

If you are leading or financing a cannabis-related company, we help you prosper via trusted information services and exceptional events.

Our publications have the highest business readership in the industry. Our events are sell-outs, year after year after year. And, we've been cited everywhere from

Harvard Business Review and the *Wall Street Journal* to *Forbes*, *Fortune* and *Fast Company*.

Do you need practical information, real-life data or industry connections to help your business grow? You'll find what you need in one of our publications, or at our national events.

We are here to help the multi-billion dollar cannabis industry prosper. Let us know how we can serve you.



Marijuana Business Daily™

The most trusted cannabis business news source since 2011

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Editor's Introduction

Before You Get Started



We know you're eager to start learning more about your customer base, cannabis users in general and how you can take your business to the next level. Before you dive into this report, however, we'd like to cover some important information about our methodology, explain what's new, define some key terms and provide a quick overview of how to use this book effectively.

Background & Methodology

- Much of the data in this report originates from an online survey *Marijuana Business Daily* conducted from June 19-27 targeting marijuana users across the U.S. We received 1,624 responses from individuals in 49 states plus Washington DC (North Dakota was the only state not represented). We also received responses from several dozen users in other countries, but we only incorporate those into our section on cannabis tourism. Unless otherwise noted, charts reflect the results of our survey. You can see our full methodology and demographic information about survey respondents in the appendix.
- Many of our charts and data incorporate the responses of all marijuana users in the U.S., regardless of whether or not they live in a state that has legalized medical or recreational marijuana. We feel this gives business owners and entrepreneurs the best insight into what users as a whole desire. However, in some cases we believe it's more useful to focus solely on the responses of users in states that have legalized some form of marijuana and/or have operating dispensaries/recreational stores. In these instances, we clearly specify the user base in the chart title.
- Numerous charts are broken down by "medical" vs. "recreational" users. These charts reflect the primary reason individuals consume marijuana - not necessarily whether they are currently registered patients or buy from recreational stores. A user might primarily consume for recreational reasons, for instance, but hold a patient card in a state that has legalized MMJ.
- We are constantly refining our questions and methodology to ensure we provide the most accurate data. As a result, some data cannot be compared directly to the results of our previous surveys (see Chapter 3 for valid year-over-year comparisons).

What's New?

We have enhanced our survey and this report in many ways to create the definitive source for marijuana market data. In the past, we focused mainly on providing information specifically for retailers. Now, however, we include many useful data points for growers, infused products companies and other types of marijuana businesses. This year's report covers everything from black market purchases, popular online search terms and the preferences of home growers to geographical and gender differences in purchasing habits as well as detailed spending trends and preferences. Now that the adult-use marijuana industry is humming, we decided to include a wealth of information about users who consume primarily for recreational purposes, contrasting that data with the preferences and habits of those who use mainly for medical reasons. This is by far the most thorough market research report on the wants and needs of cannabis users in the industry.

Key Terms

We use very specific terminology to help clear up confusion, as there are many different terms – and meanings of those terms – out there today. Understanding how we use these words is key to digesting and analyzing the data in this report. We've included a larger list in the appendix, but here are the most important terms to understand:

- **User** – generic term for all people who consume/use medical and/or recreational marijuana.
- **Customer/recreational customers** – refers to marijuana users who state that they consume primarily for recreational, instead of medical, reasons. They may actually be registered patients or participate in an MMJ program. They also may or may not purchase cannabis from dispensaries/stores.
- **Retail** – generic term for medical marijuana dispensaries and recreational storefronts.
- **Legal states** – all formally recognized states that have legalized medical and/or recreational cannabis and are seen as having “workable” programs that at the very least allow users to use/obtain marijuana, regardless of whether the states have operational dispensaries/rec stores.

Where to Look

Sifting through a 160-page report with more than 150 charts is daunting, especially if you're busy trying to run a company in the nation's fastest-growing industry. Here's a quick guide to this report for those seeking specific information and professionals involved in a particular area of the industry:

- If you currently operate a **dispensary or recreational cannabis shop** – or are hoping to open one – read this cover-to-cover. All of the information in here will help you make better business decisions and understand the market.

- If you're primarily interested in a general overview of user demographics – including everything from age and gender to spending and black market data – focus on Chapter 1.
- If you operate an **infused products company**, pay particularly close attention to Chapter 2, where we drill down into data about edibles, topicals and concentrates.
- If you run a **cultivation site**, focus on the strain preferences section in Chapter 2, where you can also see our analysis of data provided exclusively for this report from the dispensary/rec shop listing and strain review site Leafly.
- If you run an **ancillary company** that supplies growers, dispensaries/rec shops or infused products companies – or your business targets consumers directly – use the Table of Contents to find information that will help you understand your customers.
- If you run a **testing lab**, check out the “Lab-Tested Marijuana” section in Chapter 2 to get an idea of how users feel about this important topic.
- If you want to get an idea of what “typical” marijuana customers might look like, jump to the end of Chapter 2 for our user/marijuana consumer profiles.
- If you're interested primarily in annual changes in user demographics and preferences, focus on Chapter 3.
- Finally, **everyone already in the cannabis business or thinking about getting involved** should check out the very end of Chapter 3 for a look at what trends are emerging as well as those that will materialize in the coming years.

Now you're ready to begin.

Enjoy!

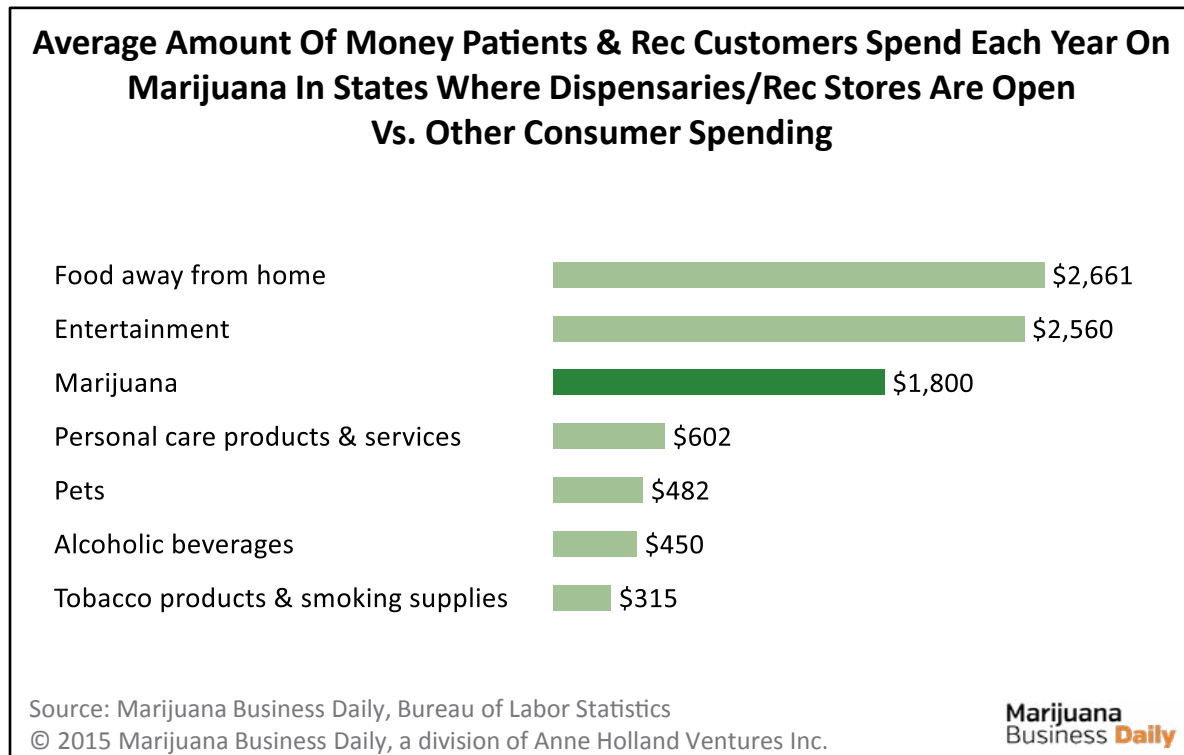
A handwritten signature in black ink that reads "Chris Walsh". The signature is fluid and cursive, with the first name "Chris" written in a larger, more prominent script than the last name "Walsh".

Chris Walsh

Managing Editor, *Marijuana Business Daily*

EXECUTIVE SUMMARY: 8 Key Charts

Chart 1: Average Amount Of Money Patients & Rec Customers Spend Each Year On Marijuana In States Where Dispensaries/Rec Stores Are Open Vs. Other Consumer Spending

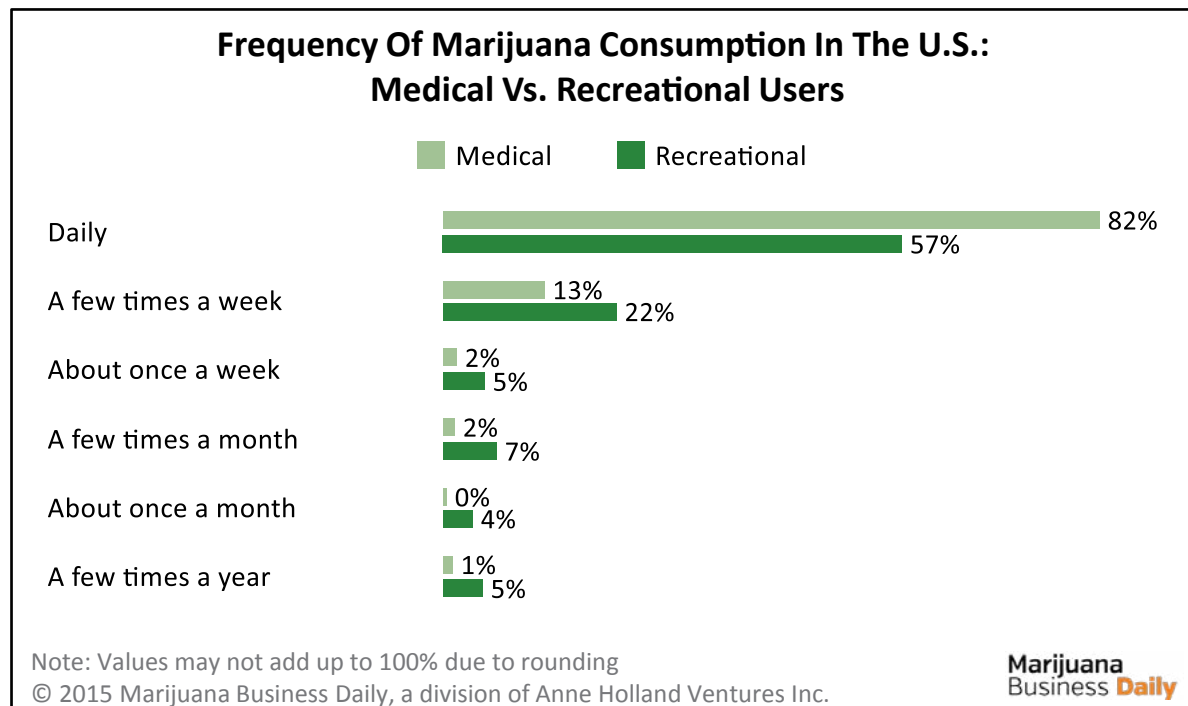


Patient and recreational interest in marijuana has grown significantly since our last consumer survey in early 2014, driven in large part by legislative, ballot box and regulatory advances across the country. Media coverage of the improved legal access to cannabis products has spurred conversations in press rooms and dining rooms around the country, demystifying marijuana for many everyday Americans and bringing more people into dispensaries and rec stores.

And alongside the increasing patient and customer counts, the typical amount spent per person on cannabis products has remained relatively stable since our last report. Medical and recreational users who have access to legal sales spend an average of \$1,800 each year to buy marijuana. In some parts of the country, they spend much more. Overall, marijuana users spend more annually on cannabis than Americans as a whole tend to spend on alcohol and tobacco.

Taken together, these trends add up to great news for businesses and entrepreneurs that want to capitalize on the opportunities of an expanding legal cannabis marketplace.

Chart 2: Frequency Of Marijuana Consumption In The U.S.: Medical Vs. Recreational Users



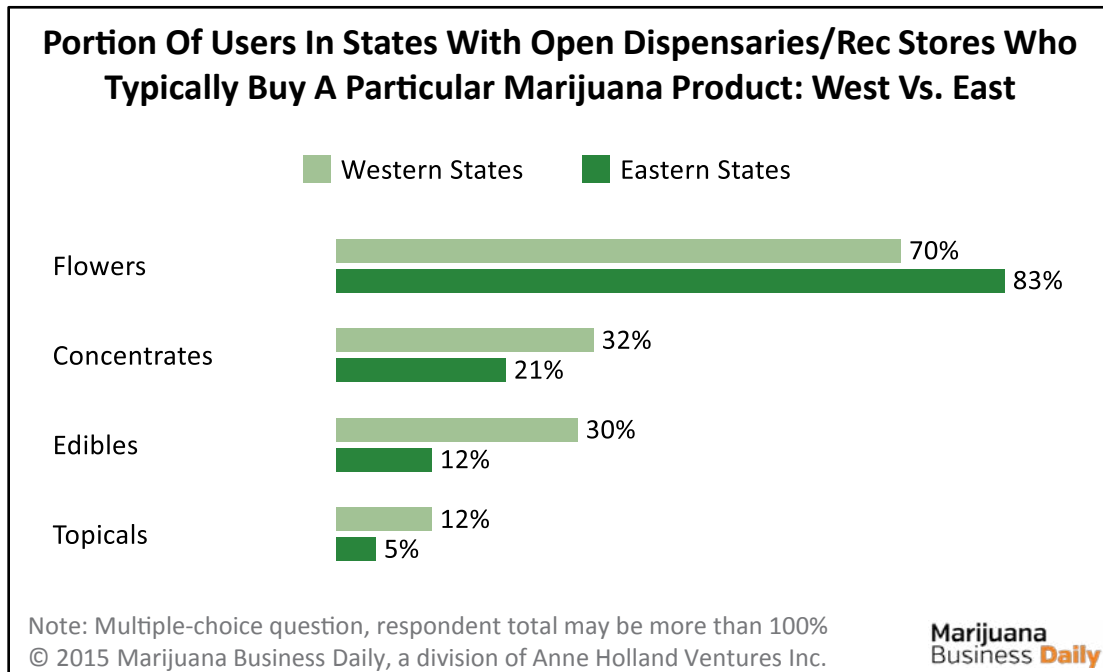
Another strong positive indicator for the industry is that the majority of people who use cannabis, both on the medical and recreational sides of the industry, consume marijuana every single day. These individuals form the backbone of the industry. Their preferences should be taken into careful account when developing plans to establish or update retail space, product offerings and price points for cannabis products.

While everyday users dominate, a sizable segment of the market uses cannabis occasionally. Data throughout this report helps business owners understand the differences in these populations and provides insights into how best to attract and serve users who consume less frequently as well as regular users.

Marijuana concentrates and edibles have experienced a meteoric rise in popularity now that more users have access to them. Edibles have proven to be immensely popular in particular in recreational markets where users are looking for discreet, on-the-go options to integrate cannabis with their activities and hobbies. Concentrates have also developed followings among certain demographics, and they are proving to be very profitable products for a business to offer.

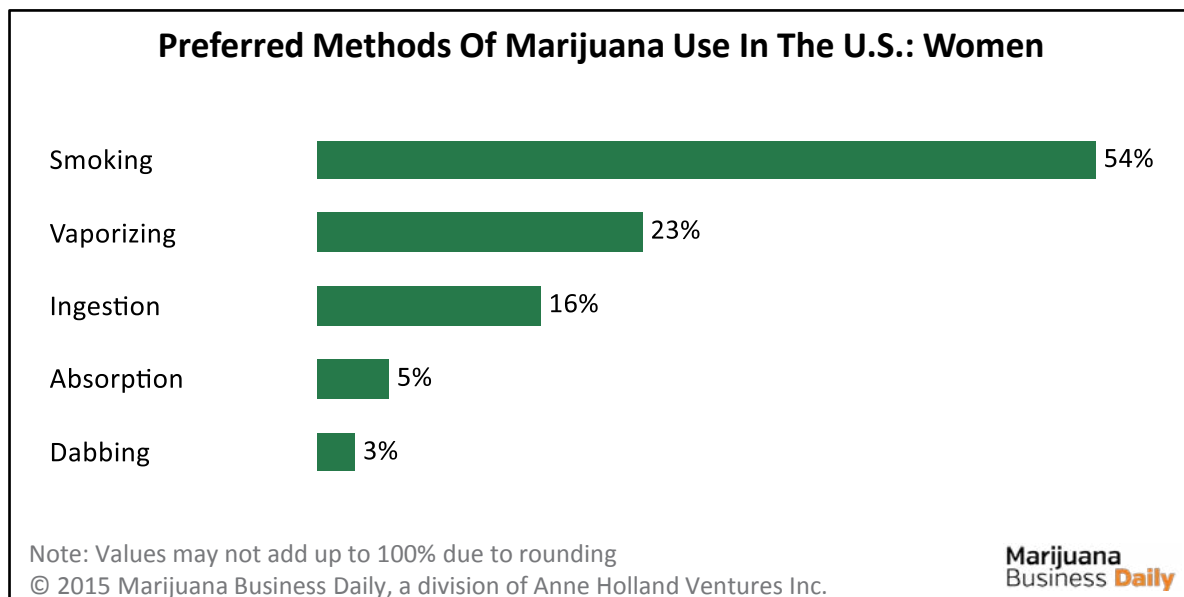
Though flowers still enjoy the position as the most preferred product overall, the mix is quickly changing, particularly in legal markets. Users are embracing new products and methods of consumption that only proliferate under the innovation and sophistication of a regulated, legitimate industry.

Chart 3: Portion Of Users In States With Open Dispensaries/Rec Stores Who Typically Buy A Particular Marijuana Product: West Vs. East



The face of the typical marijuana user is changing too, with a growing portion of female consumers exerting a noticeable influence on all aspects of the industry. Executives at all types of marijuana companies should take note of the preferences of females in everything from advertising to packaging to employee demographics at cannabis businesses.

Chart 4: Preferred Methods Of Marijuana Use In The U.S.: Women

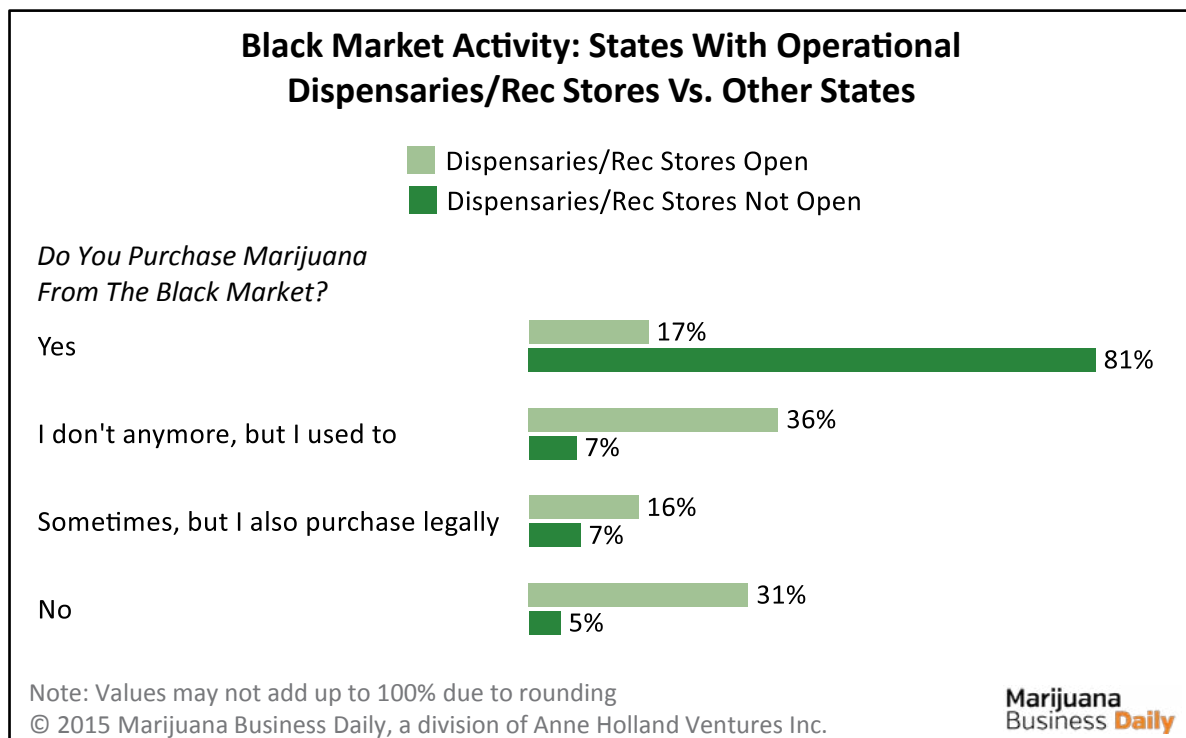


Women’s preferences for consumption can be quite different from men’s, again presenting businesses with opportunities to attract new patients/customers and better serve existing ones. Marijuana businesses that don’t acknowledge the unique preferences of women do so to their own detriment. This report provides detailed insights from this influential consumer base.

Similarly, the insights to be gleaned from this report are critical both to your own business and to the overall success of the industry. Marijuana companies that truly internalize the unique preferences of medical vs. recreational users, women vs. men, and other demographic information - as well as those that implement operational changes to cater to these groups - will be the most successful not only at earning business from licensed competitors, but at earning the business of users who are on the fence about whether to convert to legal markets.

This is particularly true in light of data from our exclusive patient and rec user survey, which gets at the heart of the reasons why certain consumers remain in the black market. Hint: It usually doesn’t have anything to do with prices.

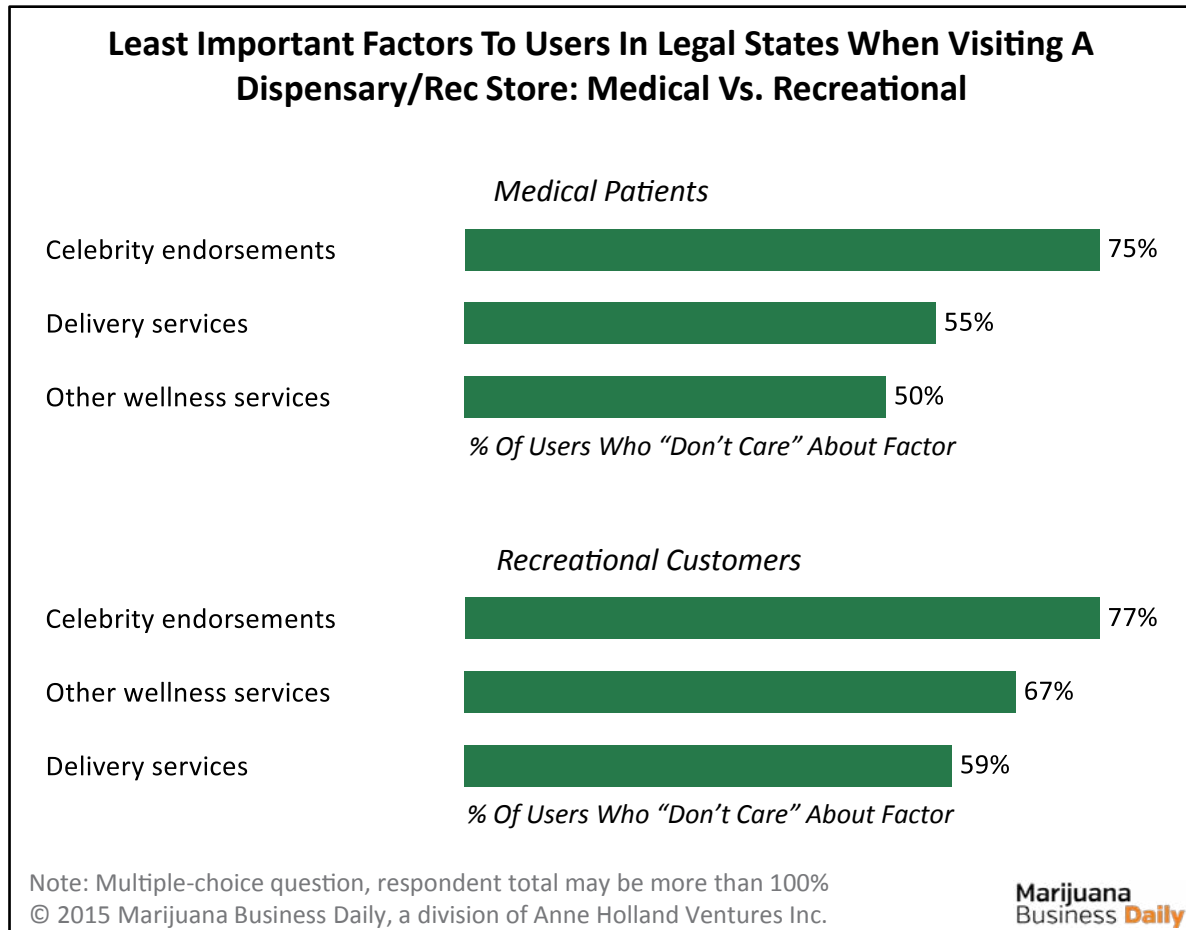
Chart 5: Black Market Activity: States With Operational Dispensaries/Rec Stores Vs. Other States



The momentum of the industry and its increasing mainstream acceptance has emboldened many public figures to “come out” about their cannabis use, while at the same time it is giving certain personalities historically associated with the classic stoner culture an additional 15 minutes of fame.

However, businesses thinking of utilizing some of that star power to enhance their sales or reputation may want to think twice. Three out of every four respondents to our exclusive survey of marijuana users in the U.S. say they don’t care about endorsements from any of these “celebrities.”

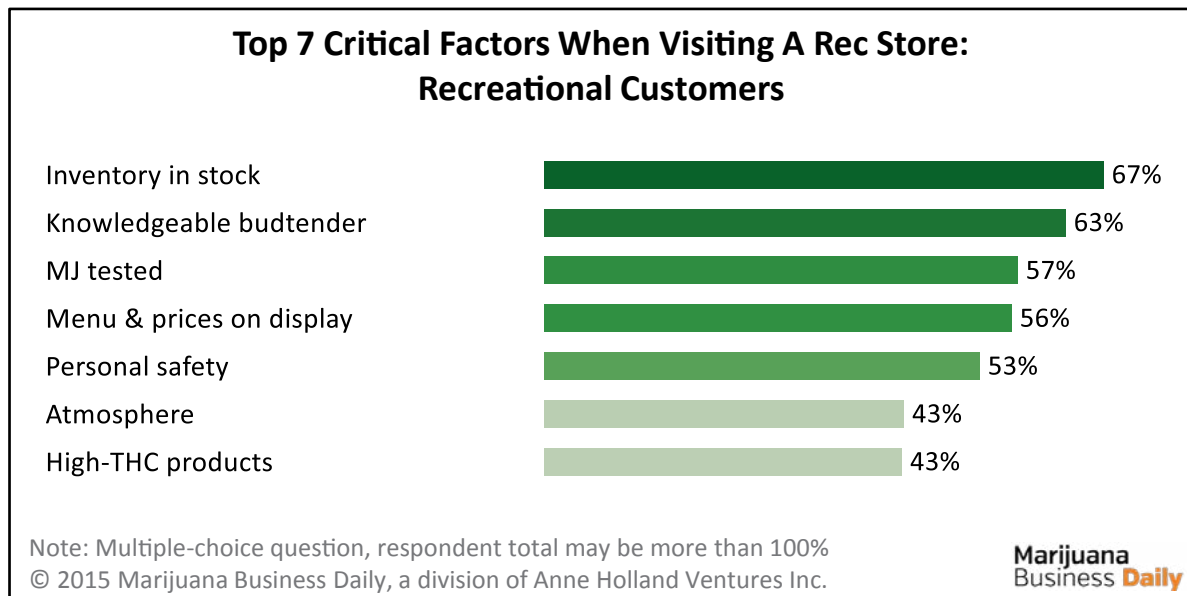
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So if you can skip high-profile endorsements and massages, then what do users really want?

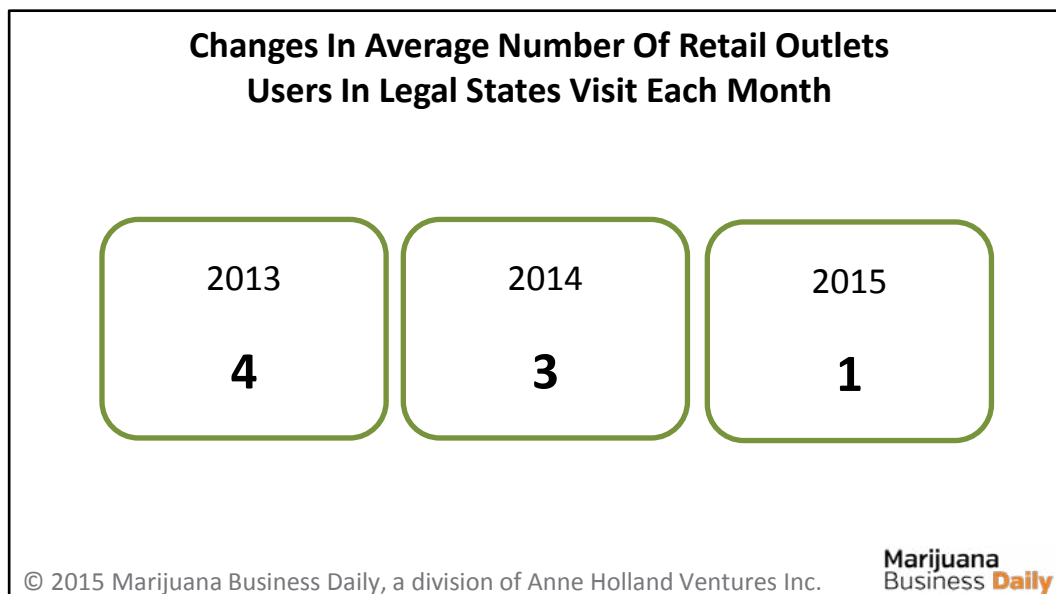
That’s the question this report has been written to help answer. Medical patients and recreational customers share some sentiments on the matter but also have plenty of differing opinions. Recreational users are newer to legal sales than most medical users, and thus have some unique preferences. One thing is for certain: Businesses in states with recreational sales that elect to serve both types of users must understand the needs and desires of these different demographics, or they risk losing one or both of these customer types to a competitor that does.

Chart 7: Top 7 Critical Factors When Visiting A Rec Store: Recreational Customers



Both medical and recreational users have shifted slightly toward less frequent purchases of higher dollar amounts in the past year and are therefore visiting fewer dispensaries/rec shops each month. How much do they spend each time, and what are their preferred products? The full report explores these questions and much, much more.

Chart 8: Changes In Average Number Of Retail Outlets Users In Legal States Visit Each Month



This report shares the most comprehensive research conducted to date on the preferences and buying behavior of both medical and recreational marijuana users in legal markets across the United States, including for users who travel to other states to engage in legal cannatourism (i.e., visiting a state where medical and/or recreational marijuana can be legally purchased). As insiders know, the pace of change in this industry is unlike that in any other. It's imperative for businesses to keep a thumb on the pulse of consumers in order to capitalize on emerging trends, meet users' needs and best the competition.

Marijuana Business Daily would like to extend a special thanks to our premier sponsor, Leafly, and to the following partners who helped get the word out about our survey to broaden its reach and bring you the most accurate information possible:

Dixie Brands
The Weed Blog
NORML
Students for Sensible Drug Policy (SSDP)
Marijuana Policy Project (MPP)

We are committed to being a partner in marijuana business' success and will continue to expand and improve this research each year. If you have any thoughts on how we can achieve that objective, please don't hesitate to contact us at CustomerService@MJBizMedia.com.

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User Profiles

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#1 - Retired Male Baby Boomer Medical User

#2 - Middle-Aged Female Treating Chronic/Severe Pain

Recreational Users

#3 - Middle-Aged Male Recreational User

#4 - Young Male Using Cannabis To Party

"Wellness" Users

#5 - Female Baby Boomer Wellness User

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Capitalizing on Trends

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Key Terms

Types of cannabis users

Types of businesses

Types of states

Types of products/consumption methods

General Demographics & User Preferences

Dollar Amounts

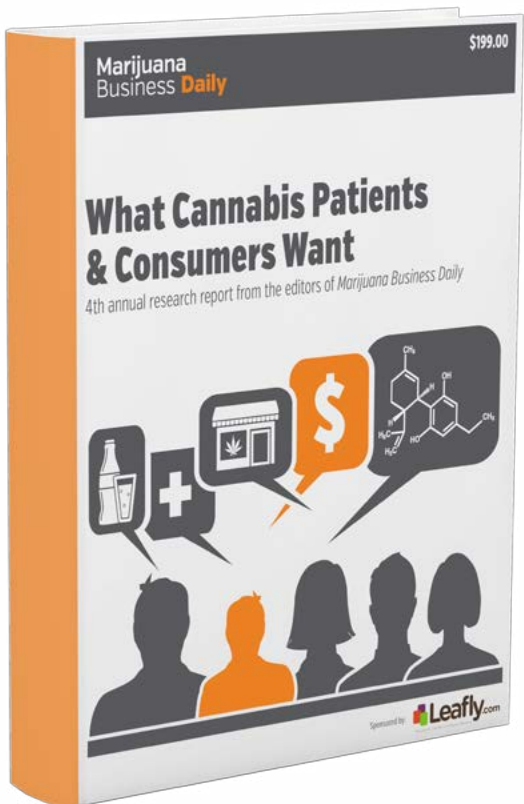
Preferences For Dispensaries/Recreational Stores

Types Of Users

What Cannabis Patients & Consumers Want

4th annual report from the editors of *Marijuana Business Daily*TM

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