

Insights into Cannabis Consumers

Drawn from the MRI-Simmons National Cannabis Study, 2019



can • nab • i • noid

/ˈkənəbə,nɔɪd, kəˈnabə-/ *Noun* CHEMISTRY

Any of a group of closely related compounds that include cannabinal and the active constituents of cannabis.

The MRI-Simmons National Cannabis Study focuses on the full cannabinoid realm. Beyond marijuana, and all the nicknames it goes by, cannabinoids include the psychotropic and non-psychotropic aspects from the marijuana and hemp plants. The category of cannabinoid covers all parts of the cannabis output including CBD (cannabidoil), a compound thought to have significant medical benefits that does not make people feel “stoned.” Some proponents claim that CBD actually counteracts the psycho-activity of THC. The fact that CBD-rich cannabis is non-psychoactive or less psychoactive than THC-dominant strains makes it an appealing option for patients looking for relief from inflammation, pain, anxiety, psychosis, seizures, spasms, and other conditions without disconcerting feelings of lethargy or dysphoria.



A unique view into the mindset of all cannabis consumers

Cannabis ingredients are already in over 1,000 products, from beauty to beverages to pet products. This industry is expected to grow exponentially from 2016 sales of \$292 million to an estimate of \$3 billion by 2021. The MRI-Simmons Cannabis Study is a robust syndicated database capturing the full spectrum of cannabis consumers in the United States. This short insights report is meant to share some topline findings. Subscribers of the full study get database access along with a full 60+ slide report.

This snapshot offers a look into cannabis consumers, including:

- Legalization and consumption habits
- Cannabis consumption in context with other behaviors
- Demographics, psychographics, and leisure activities
- Reasons for cannabis consumption
- Opportunities for expansion into CBD products for a variety of brands and categories

Methodology

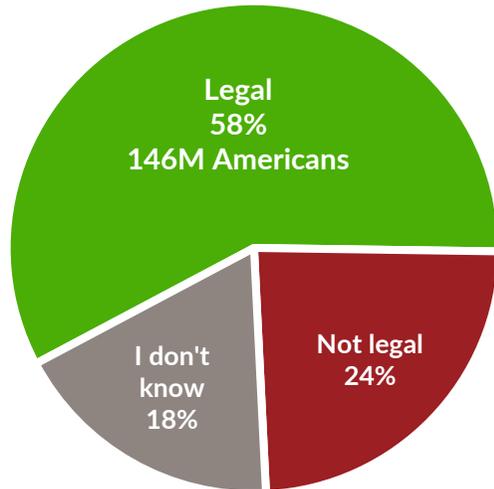
- 15-minute online study created in collaboration with Miner & Co. Studio – leading researchers in the world of cannabis since 2014
- 5,000 respondents from a nationally representative sample. Results are fused to MRI's Spring 2019 Survey of The American Consumer database for deep profiling purposes and nationwide universe estimates
- All respondents were ensured complete confidentiality. Responses cannot be tracked back in any way and all information used only in aggregate, encouraged honesty. Questions were not forced



Cannabis-legalizing laws & support of such laws are spreading

6 in 10 Americans believe cannabis should be legal, a slight uptick from the 56% reported in 2018. Supporters skew young in age (median age, 44), while opponents are older (median age, 54) and more likely to be Republican.

Should cannabis / marijuana be legal or not?



Cannabis legalization supporters are:

- Younger in age
- Median age, 44 years,
- 34% fall into 18-34 age group (index 114)

Cannabis legalization non-supporters are:

- Older in age
- Median age 54 years
- Over half (56%) fall into 50+ age group (index 122)



The majority of Americans believe cannabis should be legalized – across all groups

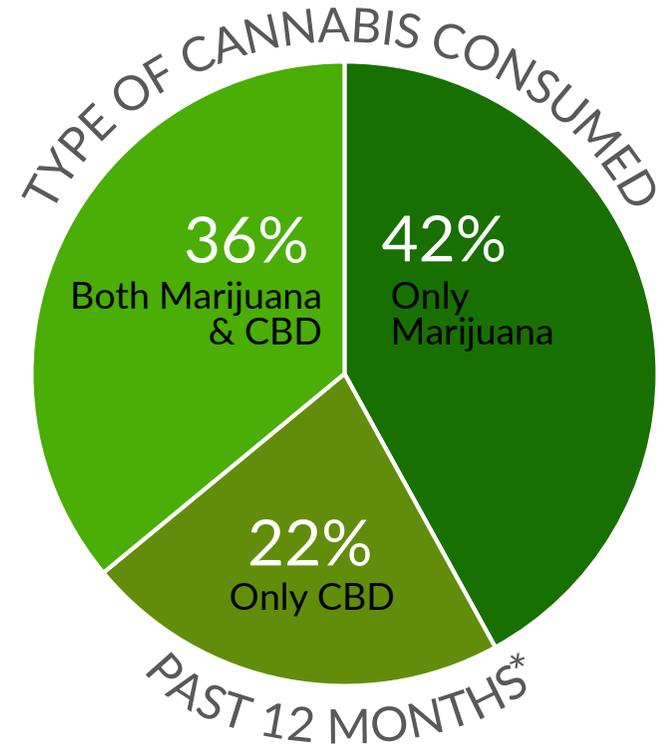
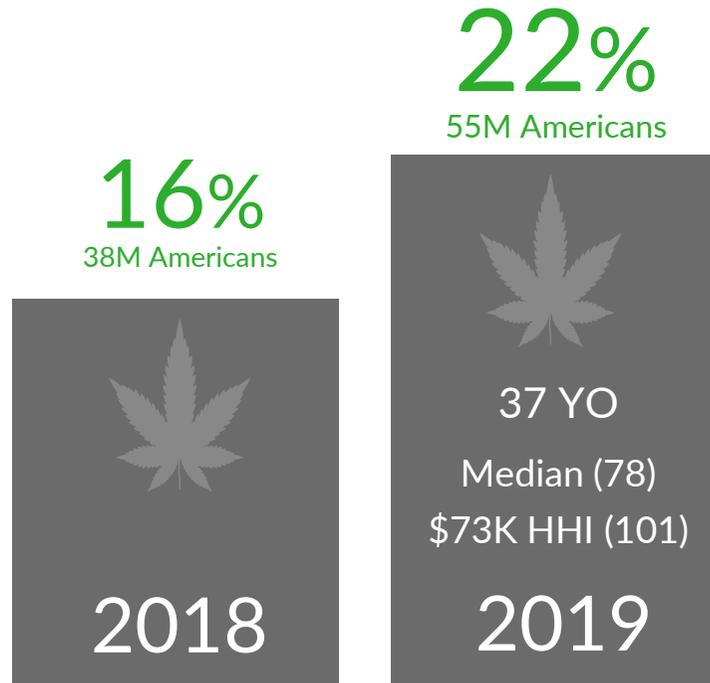
	Total Pop	Cannabis Consumers	
Legalizing is a good way to add tax revenue	70%	91%	130
Legalizing cuts down on illegal drug traffic	66%	86%	130
I expect marijuana will be legal in all states in the next 5 years	64%	84%	132
I would try marijuana if it were legal where I live	40%	87%	217
Communities are less safe with legal cannabis	37%	29%	78
I closely follow new developments regarding the legalization of cannabis	36%	73%	202

Base: Total Population (Indexed to the average Adult Age 18+)

[General Cannabis Attitudes] Please indicate how much you agree or disagree with each of the following statements. [Net: Any Agree]

Consumption has grown 38% year over year

1 in 5 cannabis consumers used only CBD products, which may be a result of the mainstreaming of CBD products into the general market following legalization in 2018

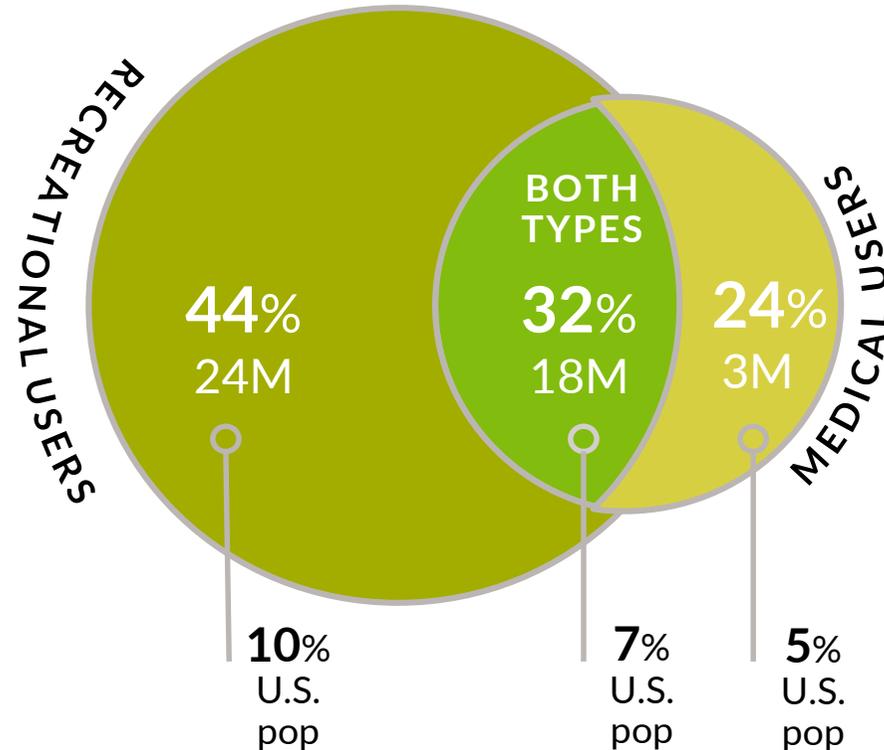


Indexed to the average Adult Age 18+
Base: Total Population, *Base: Cannabis Consumers
[Cannabis Consumer Type] Which of the following forms of cannabis have you personally consumed or used in the last 12 months?



Three reasons for cannabis consumption among adults

The majority of American cannabis consumers are **recreational users who want to have fun** primarily through entertainment endeavors and talking / socializing as compared to the **medical users who want to relax and sleep**

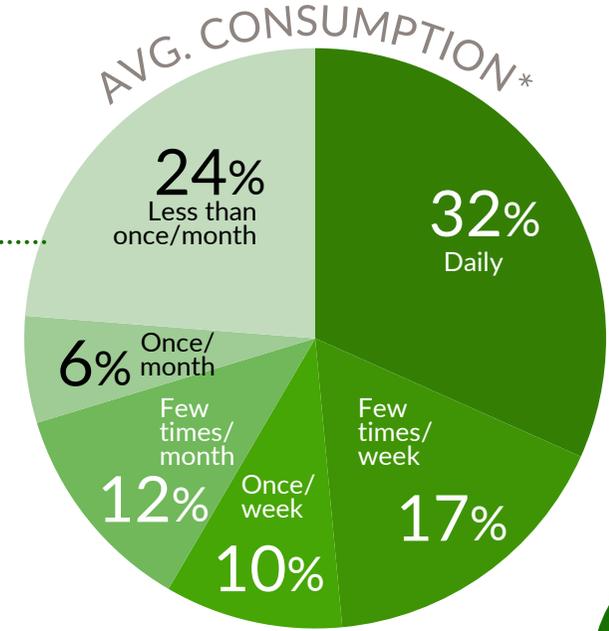
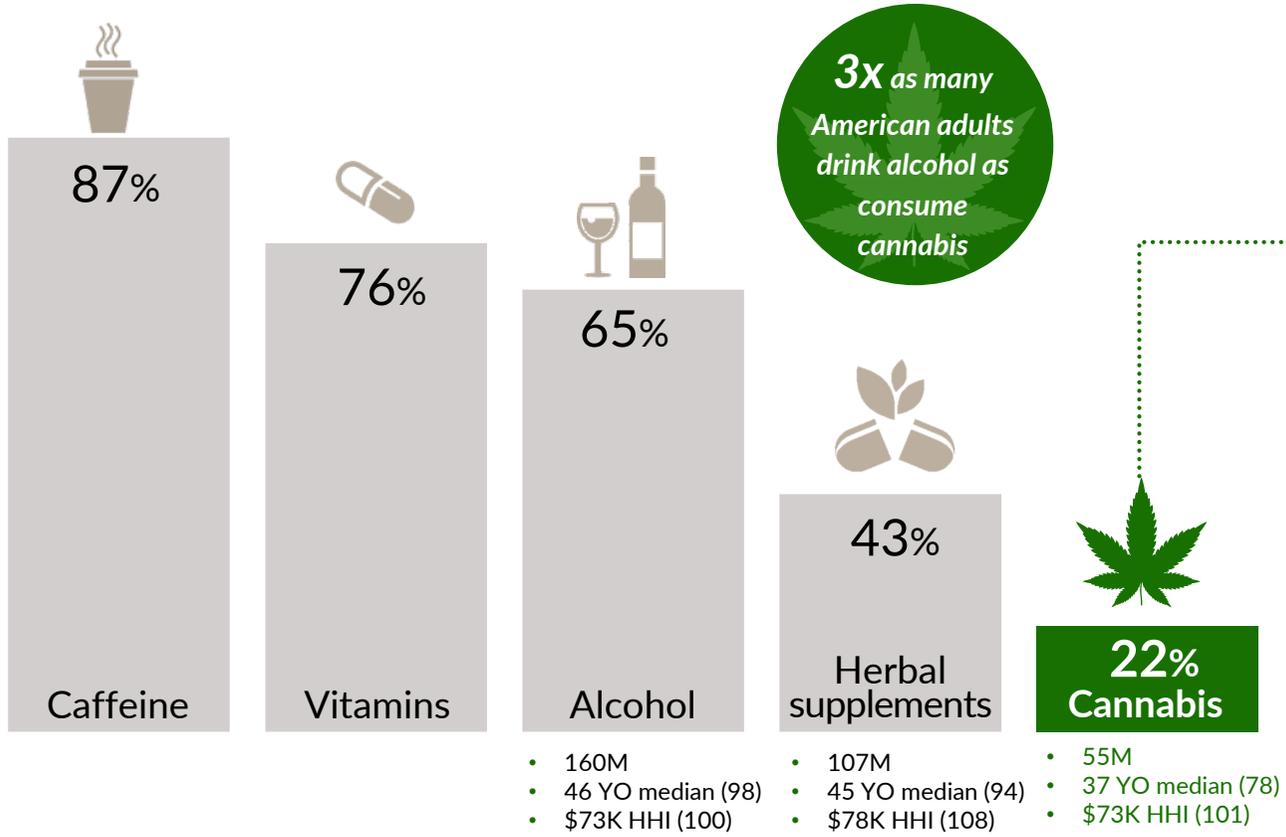


Base: Cannabis Consumers
[Medical or Recreational] Which of the following type of cannabis consumer do you most closely identify with?



Cannabis in the context of other contemporary behaviors

To understand cannabis in the context of other behaviors, we asked respondents how often they use caffeine, vitamins, herbal supplements, and cannabis. As of October 2019, 22% of American adults (55M) consume cannabis. In comparison, about 3 times as many Americans drink alcohol and twice as many use herbal supplements



**Daily use is up +23%;
Weekly use is up +66%
(YoY)**

Base: Total Population. *Base: Cannabis Consumers
[Average Consumption] How often, on average, do you consume / use each of the following?

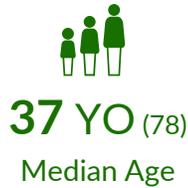
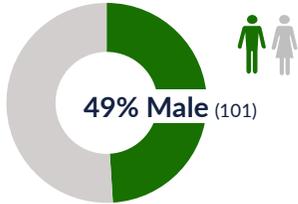


Who are the cannabis consumers?

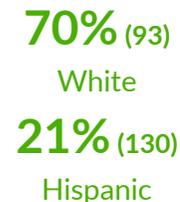
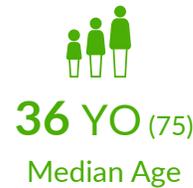
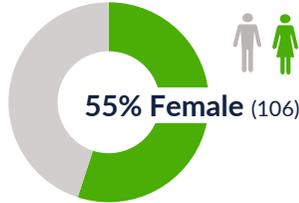
Cannabis consumers skew young in age and are more likely to be multi-cultural, single, students, and parents. The vast majority are for legalization, and just about one-half affiliate as an Independent or have no political party.



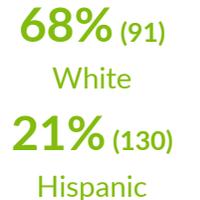
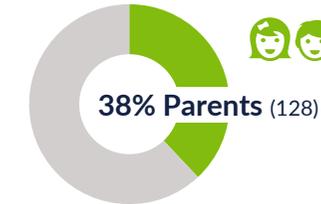
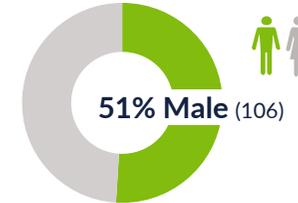
CANNABIS CONSUMERS 55M, 22% TOTAL POP



CBD CONSUMERS 32M, 13% TOTAL POP



MARIJUANA CONSUMERS 43M, 17% TOTAL POP





Cannabis consumers say it is a healthier option than alcohol

For them, the benefits of cannabis outweigh any negative concerns, and it is an all-around great wellness tool for a healthy lifestyle

TAKE
NOTE
BRANDS!

Take note alcohol brands!

	Total Cannabis Consumers	CBD Consumers	Marijuana Consumers
I feel cannabis is a healthier option than alcohol	91%	91%	101
I've cut back on alcohol in favor of cannabis	68%	70%	104
For me, the benefits of cannabis outweigh any negative health concerns	89%	90%	101
I use cannabis as a wellness tool	82%	87%	106
Using cannabis is part of my healthy lifestyle	72%	76%	105
Because I use cannabis, I am more open to using non-medicinal herbal remedies	70%	75%	108
I've cut back on prescription and/or over-the-counter medication in favor of cannabis	69%	74%	107

TAKE
NOTE
BRANDS!

Take note OTC & Rx brands!



What do cannabis consumers do and think?

Cannabis consumers are an attractive group to marketers; they are variety shoppers with an active lifestyle who are willing to try new things



LEISURE ACTIVITIES

The activities they over index for reveal a social & youthful group

- Bars / Night Clubs (20%, 117)
- Video games (11%, 127)
- Weightlifting (11%, 112)
- Bowling (11%, 121)
- Basketball (10%, 127)
- Dance/go dancing (9%, 127)
- Picnic (9%, 111)
- Painting / Drawing (9%, 116)
- Billiards/Pool (8%, 128)



SHOPPING INSIGHTS

A ripe target who enjoy shopping, are open to brands, and are influencers online

- Spender rather than saver (48%, 116)
- Shopping is a great way to relax (48%, 114)
- Children have a significant impact on brands I buy (46%, 116)
- Expect brands to support social causes (41%, 112)
- Like to share opinions by posting reviews (40%, 123)
- Like to change brands for sake of variety (37%, 120)



GENERAL ATTITUDES & VALUES

Risk-takers with an open mind

- In general, I think herbal supplements are effective (69%, 111)
- Risk taking is exciting to me (56%, 131)
- Often eat on the run (51%, 113)
- Regularly eat organic (50%, 117)
- Typically drink wine with dinner (31%, 117)



Among new product categories, there is a lot of open terrain



Interested in Cannabis/CBD infused...

Total Pop

Cannabis Consumers

Interested in Cannabis/CBD infused...	Total Pop	Cannabis Consumers
Tea	29%	54%
Food	28%	41%
Skincare (CBD)	28%	47%
Coffee	27%	54%
Soft Drinks	25%	50%
Beauty Products (CBD)	23%	45%
Bedding (CBD)	23%	47%
Beer	21%	46%
Liquor	20%	45%
Dog treats	16%	36%

Base: Total Population [New Cannabis Products Tried] Which of the following cannabis-infused products, if any, have you tried and which would you be interested in trying? (Interested in trying)

What you get...

A unique view into the mindset of all cannabis consumers

The MRI-Simmons Cannabis Study is a robust syndicated database capturing the full spectrum of cannabis consumers in the United States, offering the ability to...

- Track support/opposition to cannabis legalization among the full US population
- Discover who consumers are, what/how they consume, where they buy, their beliefs, their media habits, and where the future market lies -- including deep dives into marijuana, medical-only usage, and CBD consumers
- Segmentation focusing on cannabis attitudes towards legalization, safety concerns, and perceived benefits; as well as a secondary segmentation specific to cannabis consumers -- based on usage and attitudes, benefits, and concerns
- Leverage these cannabis-specific questions with over 60,000 variables, including questions on media, advertising, language, culture, purchasing behavior, psychographics, and more



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