

Cannabis

Consumer Report

Unparalleled insights into the perceptions, preferences, and buying behaviors of nearly 4,000 cannabis consumers



driverresearch



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Background & methodology

All figures in this report are drawn from an online survey conducted by Drive Research to better understand cannabis users. Drive Research is a national market research company based in Syracuse, NY.

Areas of interest included cannabis usage, consumption preferences, purchasing habits, and perceived benefits.

The survey took an average of 9 minutes to complete and included 47 questions. The survey received 3,926 responses **from those who have consumed cannabis in the past twelve (12) months**. Fieldwork for the survey ended in March 2023.

With a probabilistic sample, a total of 3,926 responses at the 95% confidence level offers a 1.6% margin of error.

For instance, if the survey were conducted with another random pool of 3,926 respondents, the results would yield within +1.6% or -1.6% of the stated totals in the reports.

The margin of error can be used as a guideline to understand the high degree of reliability for these results.

Conduct custom market research with cannabis users

Drive Research partners with dispensaries, growers, and marketing agencies to conduct qualitative and quantitative research studies with cannabis consumers.

Our firm works best as a market research consultant rather than the same-old traditional cookie-cutter vendor. Drive Research works with you to truly understand your objectives, goals, and outcomes to create a custom research study to address those needs as a partner.

Most importantly, our best-in-class insights lead to **actionable strategies for growth and increased revenue opportunities for your business.**



Industries [Services](#) Panel



Online Surveys

There is a science to survey design, fieldwork management, and reporting. Drive follows an exclusive process to produce actionable solutions.



Focus Groups

Whether it be in-person, online, or text focus groups, Drive provides end-to-end project management with our recruiting, moderating, and reporting services.



Qualitative Recruiting

We specialize in online recruiting including the use of our national panel and social media ads to quickly recruit quality participants cost-effectively.



In-Depth Interviews (IDIs)

Have a detailed conversation with key influencers and content creators to gather in-depth feedback about your brand, products, or services.



User Experience (UX)

Our methodology for user experience utilizes screen-sharing technologies with a trained interviewer, interviewee, and a question guide.



New Product Development

Identify, create, and launch successful new products, services, or concepts by using market research, prototyping, and testing.

There's more where that came from

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Introduction

In recent years, the legalization of cannabis has brought significant changes to the industry. With more states legalizing the plant for recreational and medicinal use, the market is expected to grow exponentially. To lend a hand and provide insights, our market research company conducted a survey with nearly 4,000 cannabis consumers to gain insights into their purchasing behaviors, habits, and overall experiences with the plant.

This report aims to provide distributors, dispensaries, and agencies with a competitive edge in the industry by shedding light on key statistics such as frequency of use, preferred consumption methods, and factors that influence dispensary selection.

Furthermore, we delve into the impact of cannabis on mental health and social behaviors, as well as attitudes toward drug testing in the workplace. By analyzing the data collected, we hope to assist cannabis industry stakeholders in making data-driven decisions to drive more sales and meet the evolving needs of the cannabis consumer.

Enjoy!



GEORGE KUHN
Owner & President



Key insights

Cannabis usage is frequent

Cannabis usage is highly normalized and integrated into the **daily routines of many users**. It is consumed frequently, with a majority of users consuming it at least once a week and nearly half consuming it every day.

Preferred consumption methods are clear

While preferences for cannabis strains vary among users, smoking is by far the most popular method of consumption, with **60% of users preferring to consume cannabis by smoking**.

They're heavily influenced by word-of-mouth marketing

Most users became aware of dispensaries through recommendations from friends and family. Though, when it comes to choosing a dispensary to purchase cannabis from, price and quality matter most.

Consumers see many health benefits from cannabis

Most cannabis consumers use cannabis for stress/anxiety relief, relaxation, and sleep. They strongly credit cannabis with **improving their overall happiness and mental health**.

More are using cannabis as an alternative to alcohol

2 in 3 cannabis users who consume liquor, beer, or wine have cut back on drinking due to the negative effects of alcohol. Many perceive **cannabis as a less harmful, better alternative to alcohol**.

01

Cannabis usage & perceptions

Most cannabis users surveyed consumed cannabis every day (48%), with the vast majority using it at least once a week (82%)

With a significant percentage of cannabis buyers consuming it every day, growers and dispensaries should prioritize products that are more cost-effective for daily use, such as pre-rolls or bulk purchases of edibles.

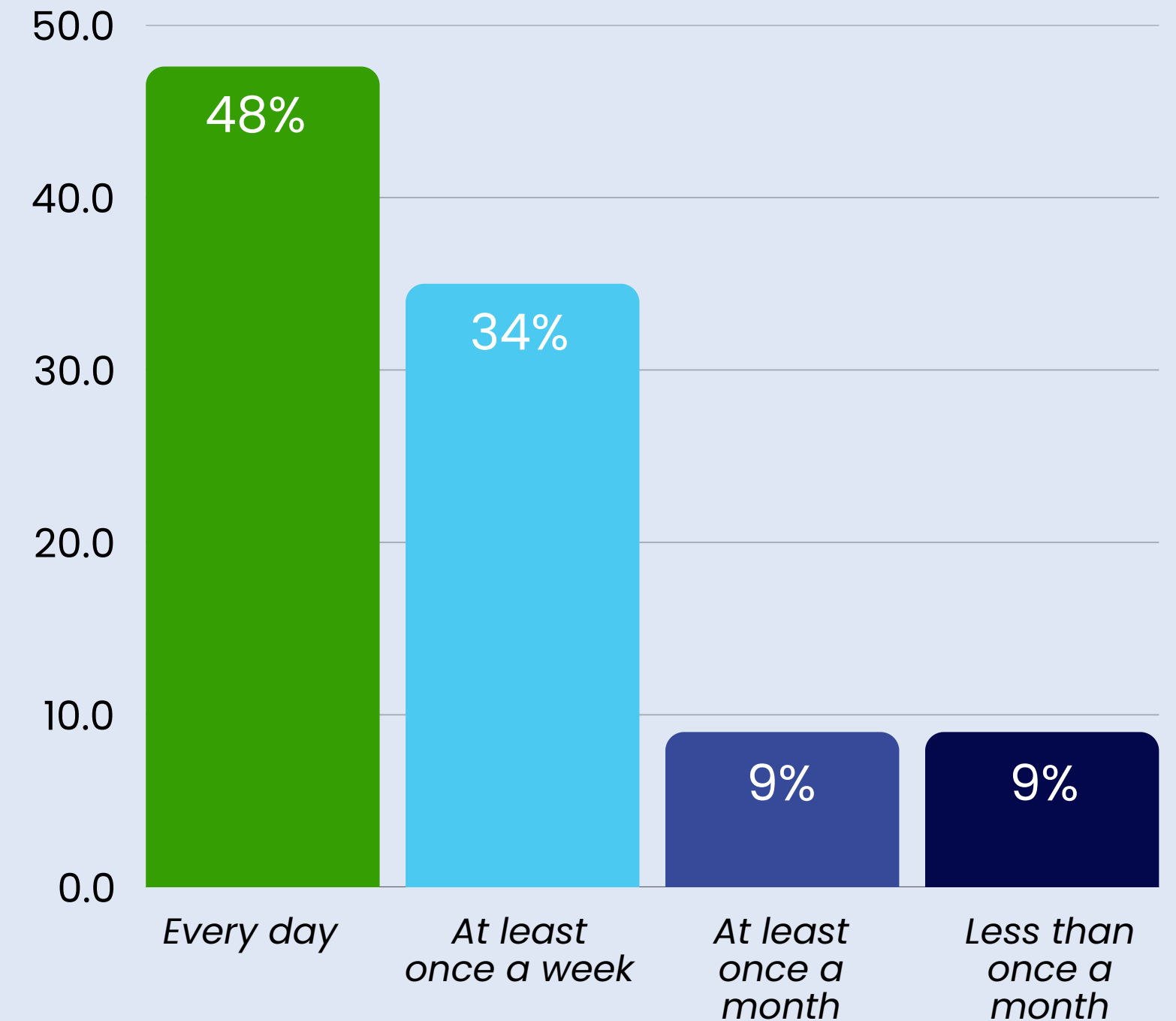
Cannabis consumers are who more likely to use it every day included those who:

- 💰 Spend on average \$100 or more per purchase (64%)
- 🌿 Are cannabis enthusiasts* (61%)
- 💧 Prefer to consume cannabis by dabbing (60%)



Cannabis is part of many users' daily routines

% of respondents who use cannabis...





Nearly 2 in 3 consumers described their cannabis usage as frequent – with no plans to slow down

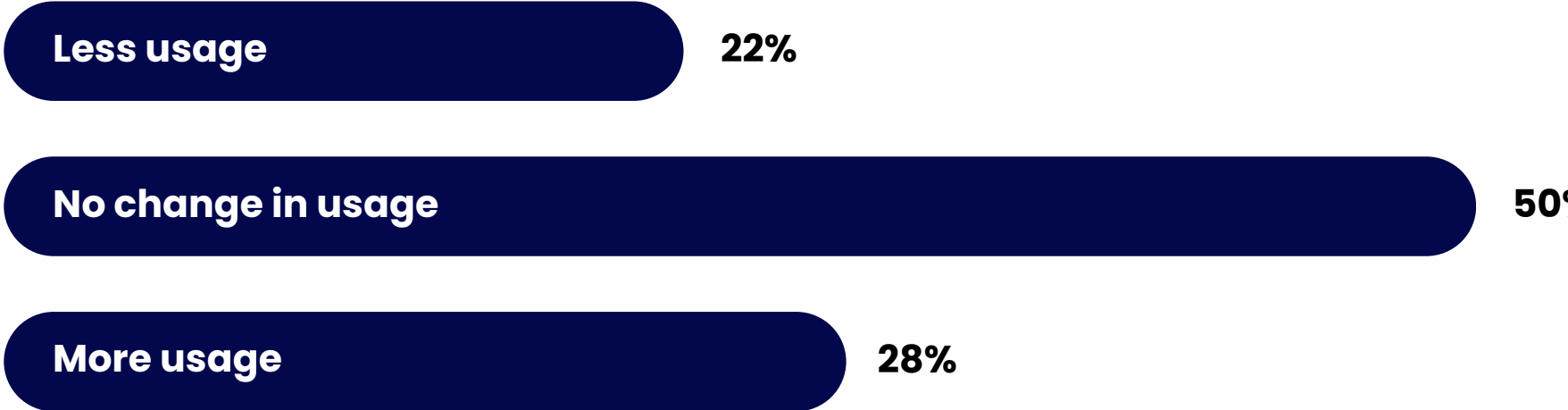
Of those surveyed, 63% primarily consume cannabis recreationally, while 37% primarily consume it for medical use. Though, despite the reason, **many describe their cannabis usage as frequent (62%).**

Additionally, when asked how consumers saw their cannabis usage changing over the next 12 months, 78% reported their usage staying the same or increasing. Those who achieved higher education levels [i.e., Master's degree (55%) or Doctorate degree (56%)] and those with an annual household income of \$100,000 or

more (48%) were more likely to report their cannabis usage increasing in the next year.

78% of consumers predict their cannabis usage will increase or remain the same in the next 12 months

Cannabis usage will remain frequent in the next 12 months
How consumers describe their frequency of cannabis usage in the future



Consuming round the clock, but living for the weekends

Common days and times users consume cannabis

	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
Early morning (Before 9 a.m.)	49%	44%	42%	45%	42%	52%	56%
Morning (9 a.m. to 11:59 a.m.)	48%	43%	42%	42%	42%	47%	53%
Early afternoon (12 p.m. to 2:59 p.m.)	48%	43%	42%	43%	42%	47%	54%
Afternoon (3 p.m to 5:59 p.m.)	52%	46%	46%	48%	46%	55%	58%
Evening (6 p.m. to 8:59 p.m.)	57%	55%	54%	55%	55%	67%	69%
Late night (9 p.m. or later)	55%	51%	50%	52%	52%	67%	69%

While times for using cannabis varied consistently across days and times of the week, there was a slight increase in usage on Saturday evenings [6 p.m. to 8:59 p.m.] (69%) and late nights [9 p.m. or later] (69%). Use was also popular on Friday evenings (67%) and late nights (67%).

Dispensaries should consider adjusting store hours to cater to the increased demand on Saturday evenings and late nights, ensuring that your shop is open and fully stocked during these times.

There is also an opportunity to **run special promotions or discounts during these hours** to encourage more customers to visit your shop.



History with cannabis among users goes back a long time

Almost half of users have consumed cannabis for 10 years or longer (46%). Fewer have used cannabis for 1 to 9 years (39%) or less than one year (15%).

Therefore, cannabis dispensaries or growers should **prioritize offering high-quality, consistent products** that meet the needs of experienced and long-term cannabis users. This could involve focusing on

developing and marketing strains that are known to have potent and consistent effects, as well as ensuring that the products are free from contaminants and pesticides.

Providing detailed information on the origin, genetics, and effects of each strain could also be helpful for new users who are looking for specific experiences or benefits.

Additionally, incentives to reward long-term customers could help to build brand loyalty and encourage repeat business from many different segment of the market.

46% of users have consumed cannabis for 10 years or longer

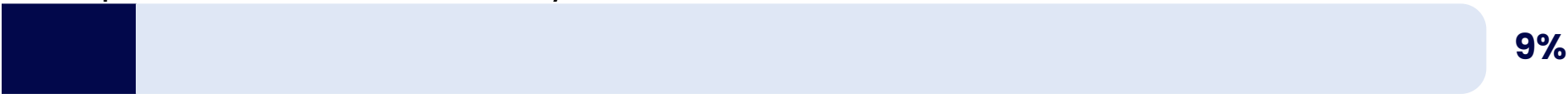
Perceptions of cannabis usage have changed

% of cannabis consumers who feel the perception of cannabis has changed in the past 5 years

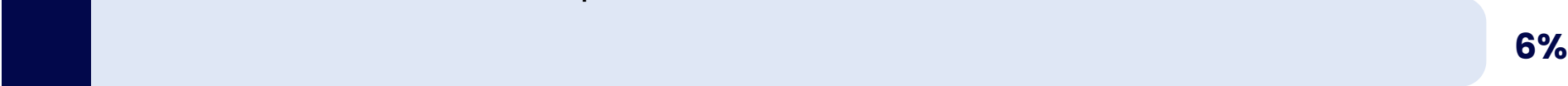
Cannabis has become more acceptable



Perception of cannabis has stayed the same



Cannabis has become less acceptable

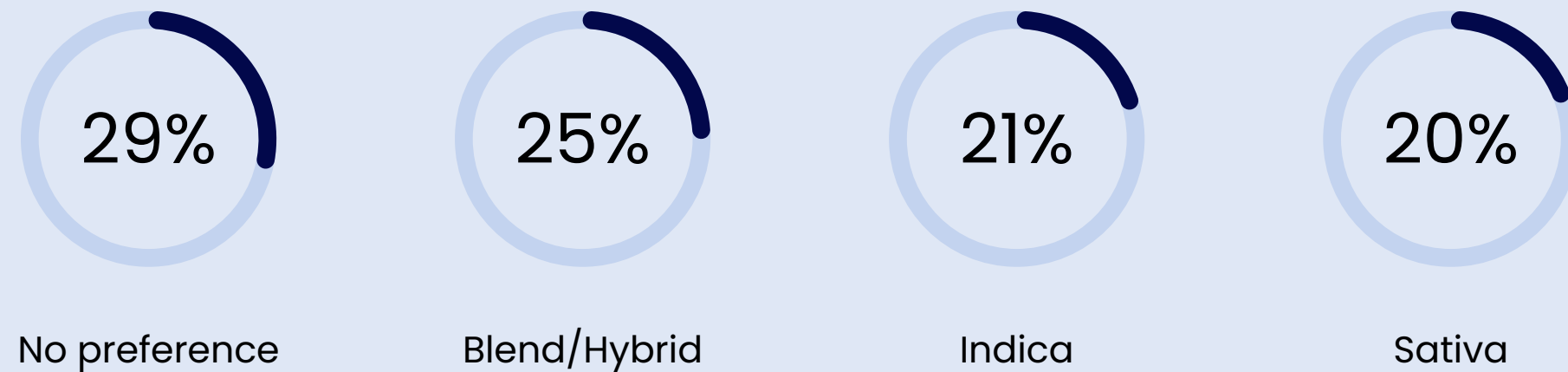


02

Cannabis consumption preferences

Preferences for cannabis strains vary among users

% of cannabis consumers who have a preference for a specific type of cannabis



5% of cannabis users are unaware of the different strains/types

Non-enthusiasts* (16%), Baby Boomers (12%), and new cannabis users, (11%) were more likely to be unaware of the different strains.

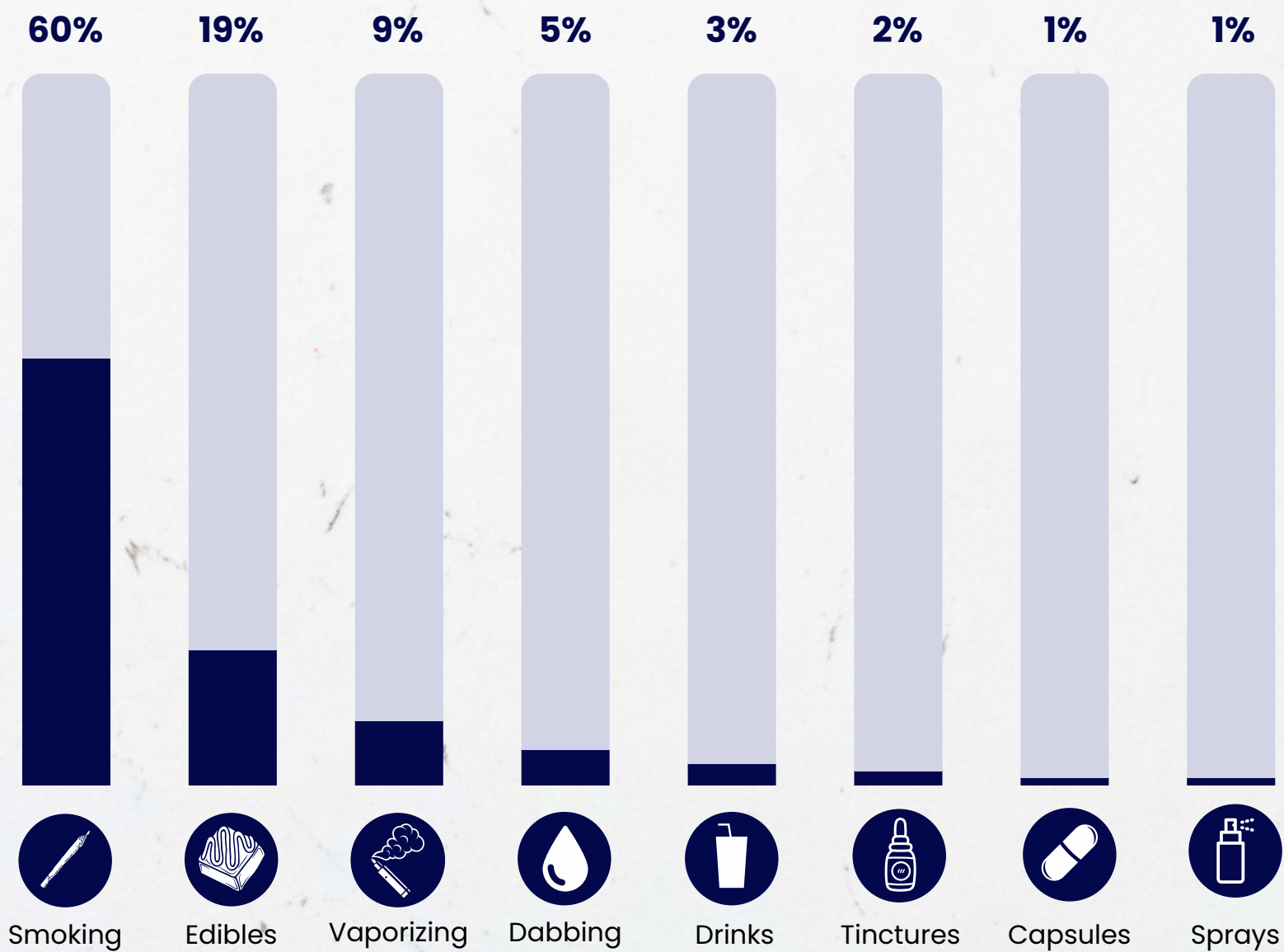
Want to learn more about new cannabis users – their behaviors, product preferences, profile, and more?

[Get the results of our cannabis consumer survey, segmented by new cannabis users](#)



Smoking is the most widely preferred method for consuming cannabis

Smoking is the most dominant and popular method for consuming cannabis, with 60% of users participating. While most **new cannabis users preferred smoking, they were more likely to prefer other methods such as edibles (27%) or drinks (7%).**



With most smoking cannabis, dispensaries should prioritize their supply of smoking-related products, such as pre-rolled joints. Additionally, the dispensary could leverage the popularity of smoking by incorporating it into social events, such as **smoking lounges or outdoor areas for smoking with friends**. By creating a welcoming and inclusive atmosphere that caters to all consumption preferences, the dispensary can establish itself as a go-to destination for cannabis enthusiasts of all backgrounds.



Consumers use cannabis in a variety of settings

% of cannabis consumers who use it...

Both alone and with others

41%

Alone

37%

With others

22%

Most typically consumed cannabis alone and with others (41%). Fewer typically consumed strictly alone (36%) or with others (22%).

Non-enthusiasts (37%) and those who prefer to consume cannabis by sprays (34%) were more likely to consume with others, while **new users were more prone to consume alone (46%)**.

Potential reasons why new cannabis users consume it alone include lack of experience, privacy concerns, and the social stigma associated with cannabis usage.

To capitalize on this discovery, dispensaries should promote and

market products as social and community-oriented. For example, a dispensary could **host events that revolve around cannabis use** such as cannabis-infused cooking classes or game nights.

In addition, dispensaries could create social media content featuring groups of friends enjoying cannabis together and highlighting the social benefits of cannabis use.

New cannabis users are more prone to consuming it alone

03

Dispensary shopping habits

Most cannabis users support local dispensaries

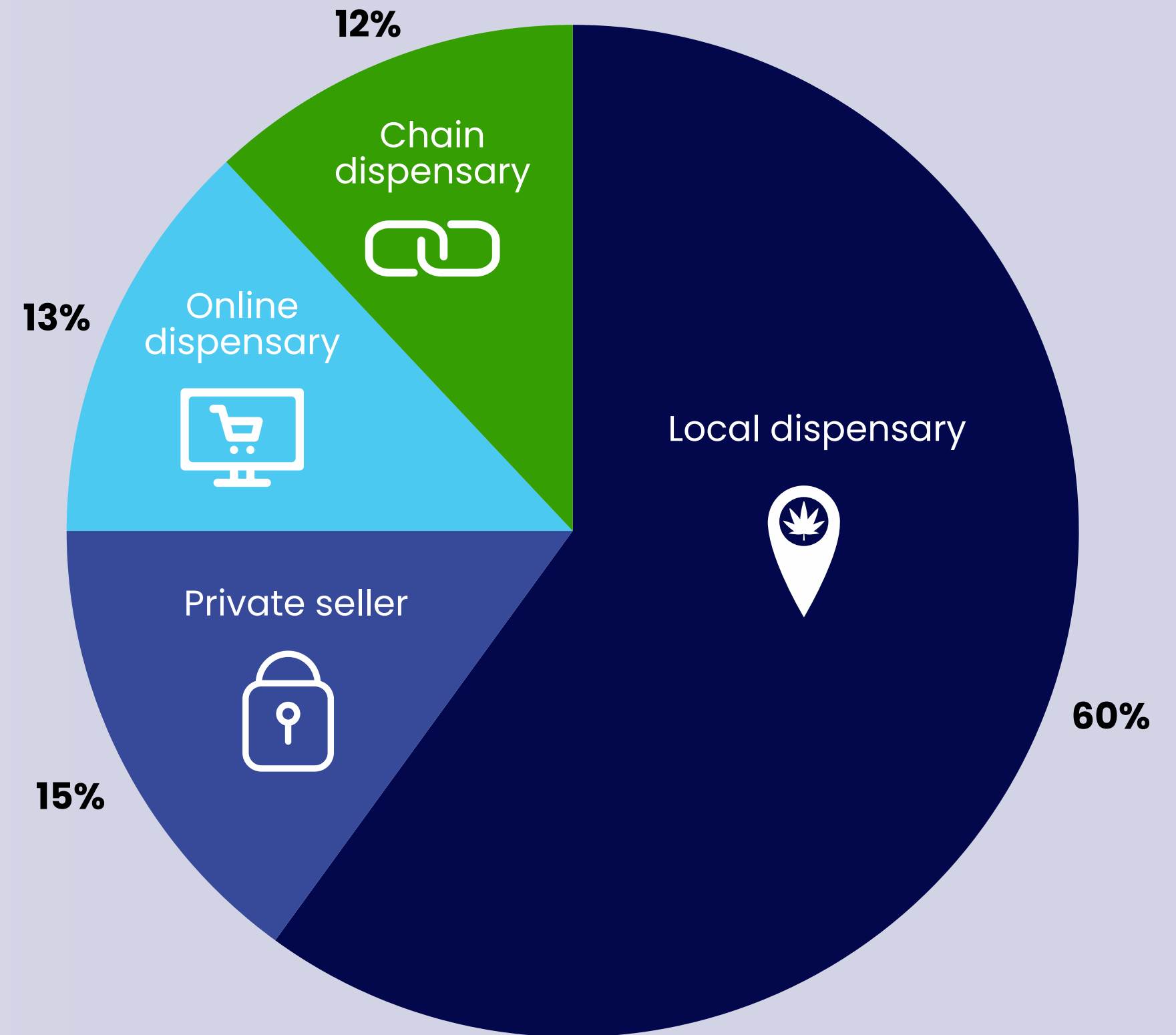
Over half of users typically bought cannabis from a local dispensary (60%). Fewer usually purchased from a friend/family member/private seller (15%), online dispensary (13%), or chain dispensary (12%).

Those who achieved higher education levels [i.e., Master's degree (32%) or Doctorate degree (30%)], those with an annual household income of \$100,000 or more (27%), and **new users (22%) were more likely to usually purchase from online dispensaries.**

Local growers and dispensaries should target all cannabis users, while online dispensaries can target more specialized audiences, such as those with advanced degrees and higher-income earners.

60% of users usually purchase cannabis from local dispensaries

Where consumers most commonly purchase cannabis



Word-of-mouth marketing is very influential in the cannabis industry

How do users become aware of dispensaries to purchase cannabis?

Most users became aware of dispensaries to purchase cannabis through a recommendation from friends/family (56%). Other top awareness methods included Google (42%), driving by locations (34%), and Facebook (25%).

With this in mind, dispensaries should focus on the following strategies to increase awareness and drive new business:

- Incentivize satisfied customers to share their positive experiences with friends and family
- Invest in online cannabis marketing strategies such as hosting a website, search engine optimization (SEO), and social media pages
- Prioritize physical locations with high visibility to increase the likelihood of users discovering them through driving by



Sources of awareness

% of cannabis users who become aware of dispensaries through...





Mind your P's and Q's (price and quality)

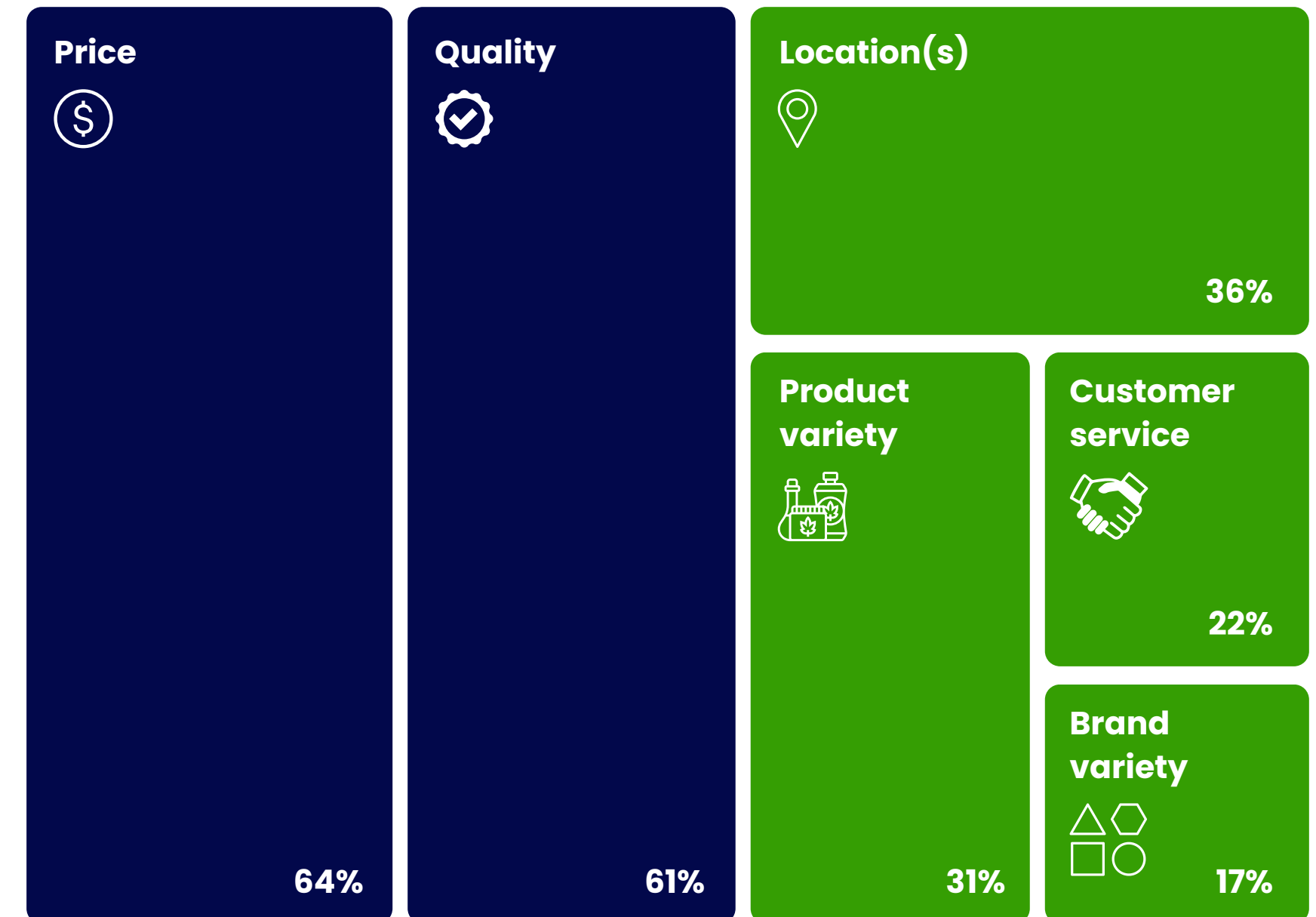
Nearly 2 in 3 respondents reported price (64%) and quality (61%) mattered most when choosing a dispensary to purchase cannabis from. Other important factors were location(s) (36%), product variety (31%), customer service (22%), and brand variety (20%).

Dispensaries should **prioritize customer education on the quality and benefits of their products**, as well as provide transparent information about their sourcing and testing processes.

In doing so, they can help customers make informed decisions about their purchases and increase their trust in the dispensary.

Interested in learning how to measure cannabis consumer buying habits?

[Read this blog](#) 



Most users spend \$20 to \$99 per cannabis purchase (63%)

Respondents were asked, on average, how much they spend per cannabis purchase. Nearly 1 in 3 users reported spending \$20 to \$49 (31%) and \$50 to \$99 (31%). Fewer spent more than \$100 (25%), less than \$20 (10%), or were unsure (2%).

To encourage more spending per shopping trip, dispensaries should consider offering discounts to customers who make larger purchases.

For example, offer a discount to customers who spend more than \$100 per purchase or who make multiple purchases within a certain time frame.

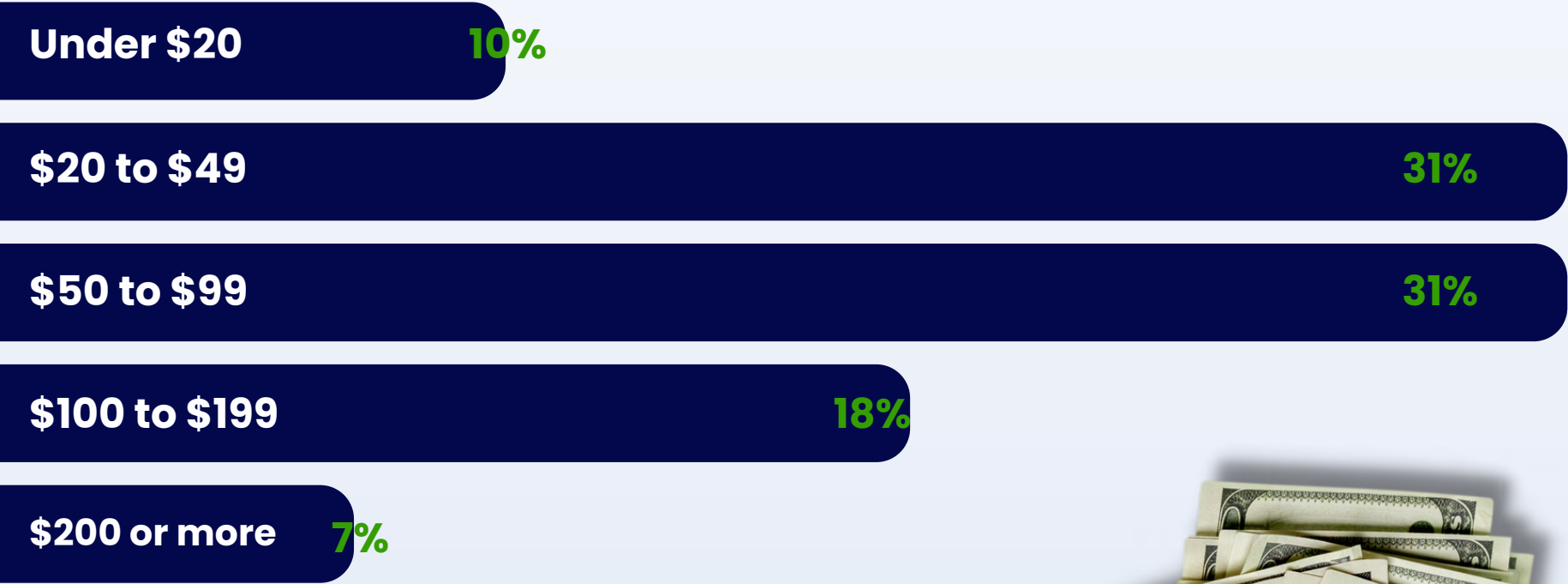
It's worth remembering that **specific customer segments are likely to spend more** than others.

For instance, those who achieved higher education levels [i.e., Master's degree (35%) or Doctorate degree (36%)] and those with an annual household income of \$100,000 or more (35%) were more likely to spend between \$100 and \$199.

Additionally, those who preferred to consume cannabis by capsules (33%) or drinks (30%) were more prone to spend \$100 to \$199 per cannabis purchase.

Dispensaries should consider offering discounts to customers who make multiple purchases within a certain time frame.

How much users spend per cannabis purchase



Want to know more about how purchasing habits differ across demographics? [See results by segments of your choice](#)



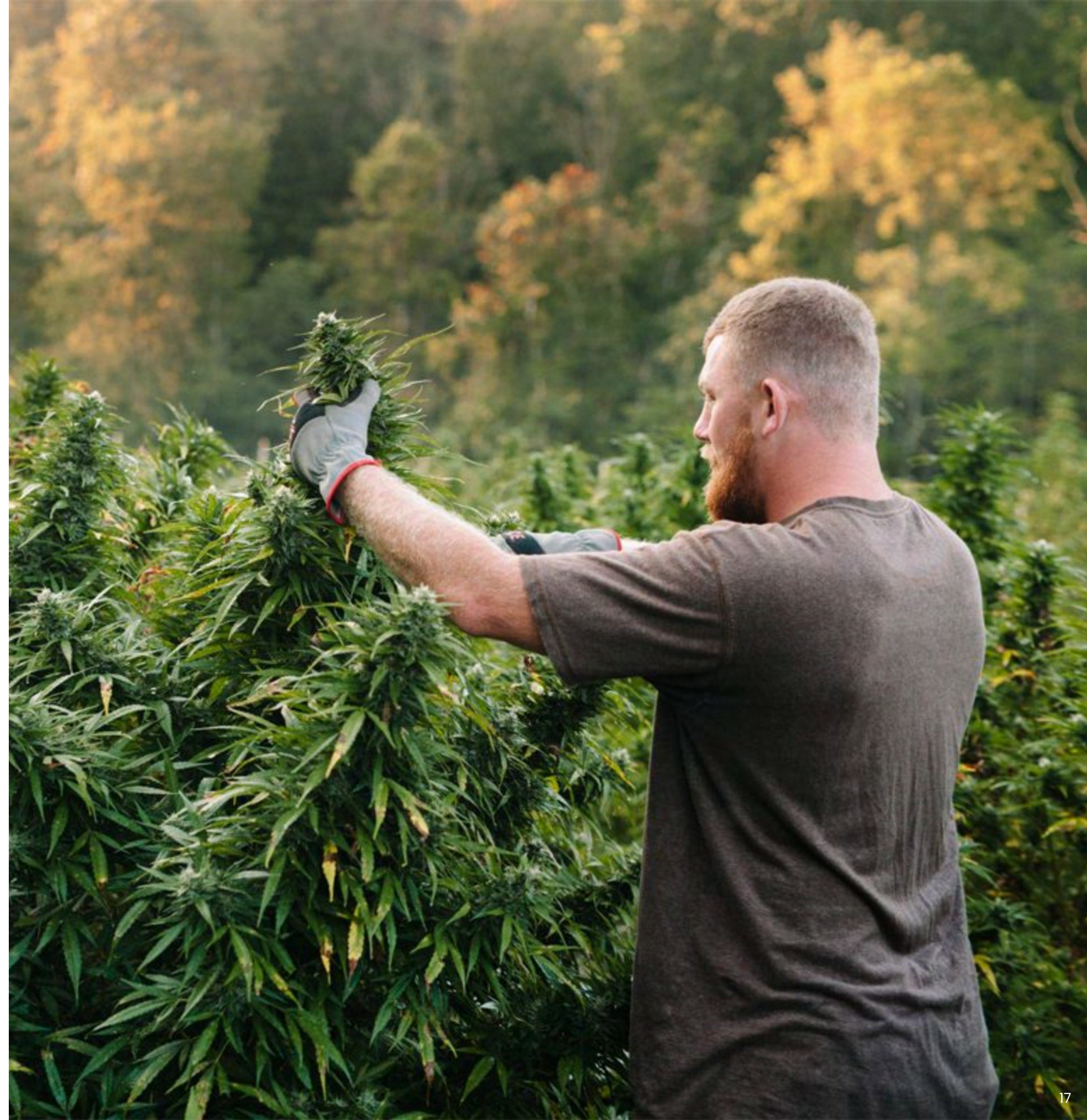
04

Perceived health benefits

From pain relief to anxiety reduction, cannabis has been touted as a natural remedy for a wide range of health issues. And cannabis users agree.

Our market research company asked consumers to rank the top reasons they use cannabis. Here are where the following factors ranked.

1. **Stress/anxiety relief**
2. **Relaxation**
3. **Mental health**
4. **Improve sleep**
5. **Pain management**
6. **Recreation**
7. **Improve my quality of life**
8. **Physical health**
9. **Increase motivation**
10. **Boredom**
11. **Peer pressure**

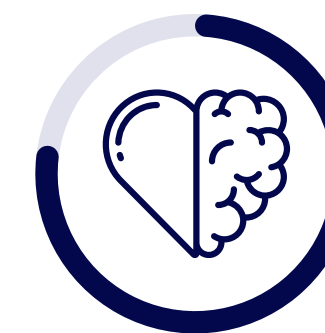




Users reported these positive impacts from consuming cannabis:



79% reported
*increased
overall happiness*



78% reported
*improved
mental health*



63% reported
*better social
interactions*

Majority of cannabis users give the plant high praise for boosting overall happiness and mental health

8 out of 10 consumers felt cannabis usage positively impacted their overall happiness (79%). Very few thought it negatively impacted their happiness (3%).

Similarly, 3 in 4 consumers felt cannabis usage positively impacted their overall mental health (78%), with very few reporting it negatively impacted their mental health (4%).

Those who spent \$100 or more per cannabis purchase on average were **more likely to indicate a positive impact (88%).**

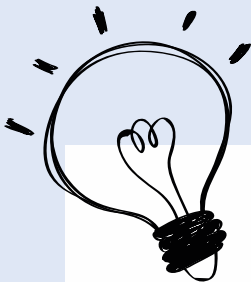
Lastly, nearly 2 in 3 consumers indicated cannabis usage has positively impacted their social interactions (63%). Few felt it had a negative impact (8%).

**78% of consumers
felt cannabis usage
positively impacted
their overall mental
health**

What are the biggest perceived benefits of cannabis usage?

For many, cannabis aids in relaxation, anxiety, improved sleep, and pain management. All of these benefits were **referenced by 54% or more of all cannabis users**. However, there is a long list of other advantages experienced by many users.

 Relaxation	77%
 Helps with anxiety	72%
 Improved sleep	68%
 Pain management	54%
 Increased appetite	41%
 Enhanced creativity	35%
 Increased motivation	30%
 Reduced nausea and vomiting	30%
 Reduced inflammation	27%
 Lower blood pressure	21%



An actionable recommendation for dispensaries would be to educate customers about the various strains and products that are specifically targeted toward relaxation, anxiety, improved sleep, and pain management. This could include having **knowledgeable budtenders on staff** who can answer questions and make personalized recommendations based on the customer's needs.



Drawbacks and barriers to usage

What prevents users from consuming cannabis more regularly?

Those who use cannabis once every few weeks or less often were asked what factors cause them to not consume cannabis more often. Most said cannabis' **impact on daily functions** (i.e., driving, work, school) (39%) and its expensiveness (36%) prevents them from consuming cannabis more regularly.

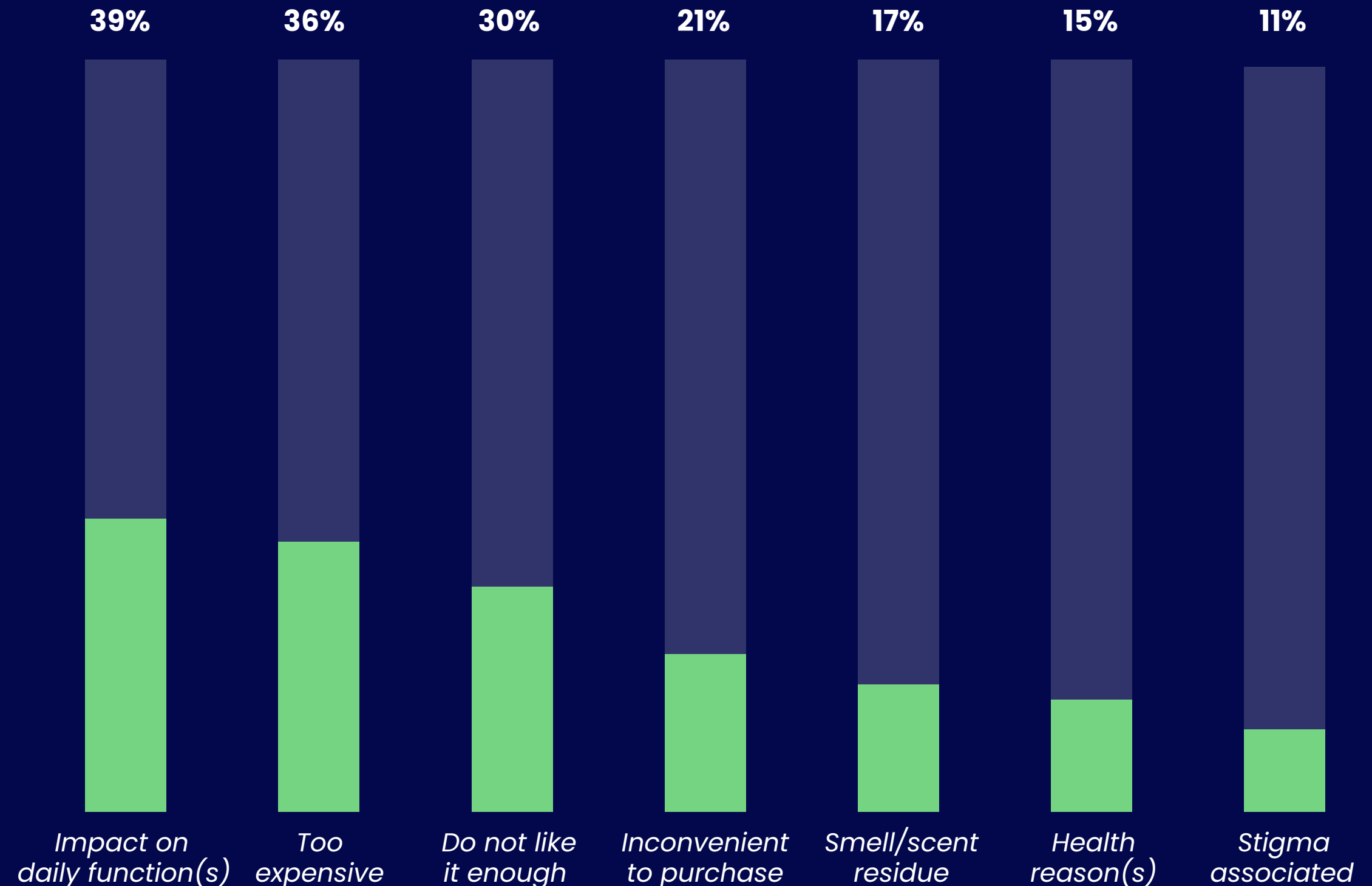
With this insight, dispensaries should consider offering educational resources about the different effects of different strains of cannabis. For example, dispensaries could provide

information on strains that are designed to promote relaxation or help with sleep, as well as strains that are designed to boost energy and motivation. Dispensaries could also provide information on the specific cannabinoids and terpenes that are responsible for these effects.

Providing educational resources about the science behind the different strains of cannabis can help dispensaries build trust with their customers and promote responsible use of cannabis.

Top barriers to regularly consuming cannabis

According to users who consume cannabis once every few weeks or less often



Dispensaries can stand out against competitors by offering solutions to common drawbacks of consuming cannabis

Looking for an opportunity to stand out from the pack and address aspects of cannabis usage consumers dislike?

The survey revealed that among all cannabis users, most perceived having a dry mouth (47%) and the cost (44%) as the biggest drawbacks of using cannabis.

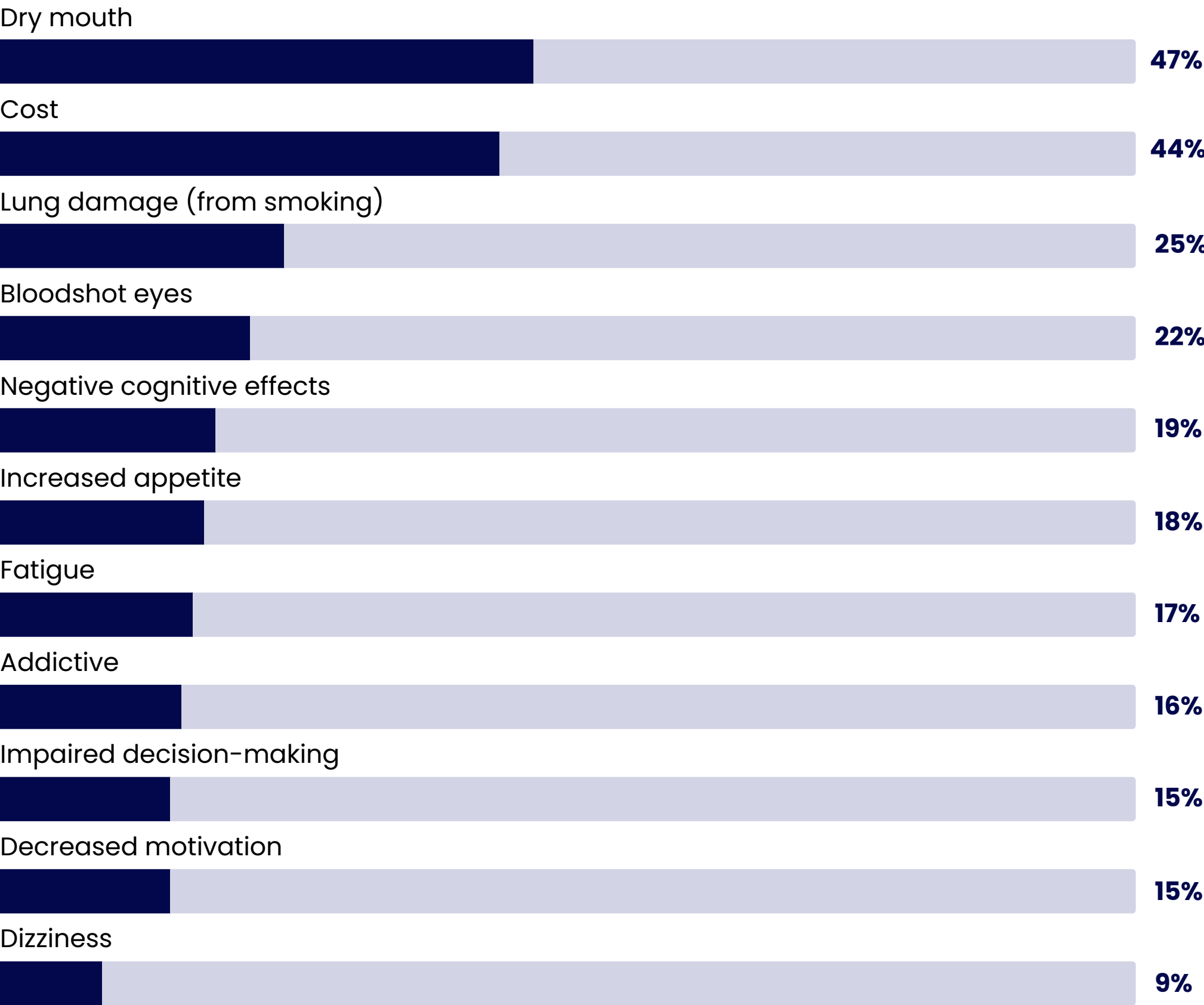
Fewer mentioned drawbacks such as lung damage from smoking (25%), bloodshot eyes (22%), and negative cognitive effects such as decreased attention, loss of memory, and difficulty learning (19%).

To alleviate these concerns, dispensaries should focus on offering the following:

- Competitive pricing and regular discounts or promotions
- Alternative methods to smoking cannabis, such as edibles, tinctures, or vaporizers
- Educational resources, such as brochures or in-store consultations to help customers make informed decisions and feel confident in their purchases

Downsides of using cannabis: user perspectives

% of cannabis users who report the following as drawbacks to cannabis usage:



Comparisons to other drug & alcohol usage

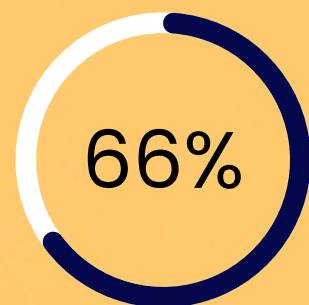
In the past 12 months, 3 in 5 cannabis consumers have also smoked cigarettes

To qualify for the survey, respondents must have consumed cannabis in the past 12 months. In addition to cannabis, most have used or consumed **liquor (66%), beer (63%), or cigarettes (60%) in the past year**. For further context, research shows that cigarette smokers are 5X more likely to be daily marijuana

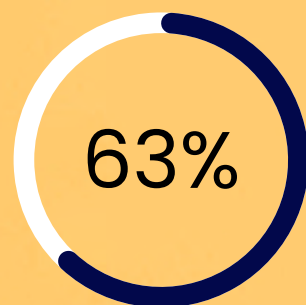
users. According to our survey, fewer used or consumed prescribed medication/pills from a doctor(s) (55%), wine (48%), cigars (21%), or chewing tobacco (13%). Offering these products could be a way to appeal to a broader range of consumers and increase overall sales.

Most cannabis users consume other types of alcohol and drugs

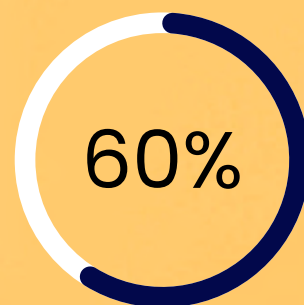
% of cannabis users who have consumed the following in the past 12 months



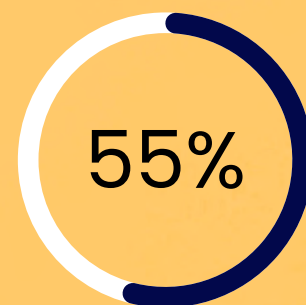
Liquor



Beer



Cigarettes



Prescribed medication





The cannabis effect: why consumers are cutting back on alcohol

In recent years, there has been a growing trend of people turning to cannabis as an alternative to alcohol. In fact, of those that consumed beer, liquor, or wine in the past 12 months, nearly 2 in 3 agreed with the statement, **"I've cut back on drinking alcohol"** (63%).

Of those that agreed, most said they cut back because they didn't like being hungover (51%) and wanted to improve their overall health (49%). Similarly, since beginning to

use cannabis, some spent less and cut back on cigarette usage (38%). While fewer spent less and reduced their usage of prescriptions/pills (23%), cigars (14%), and chewing tobacco (11%).

38% of consumers have cut back on cigarette usage since they began using cannabis

Consumers are prioritizing health and wellness over alcohol

Cannabis users are cutting back on alcohol for the following reasons:



Interested in learning how to survey cannabis users?

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Comparing booze to bud

% of cannabis consumers who agree or disagree with the following statements:

Disagree | Neutral | Agree

"I see more harm from alcohol use than cannabis use"



"Cannabis is better for a person than alcohol"



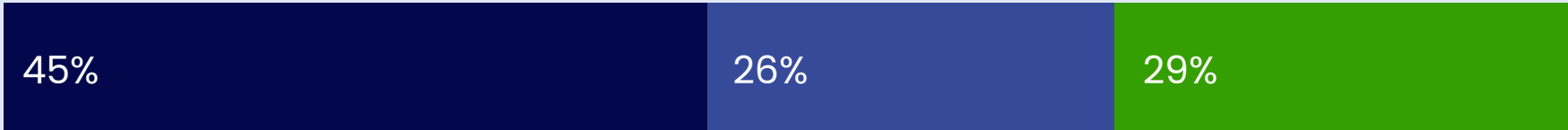
"I consume more cannabis than I drink alcohol"



"I spend more money on alcohol than I do on cannabis"



"I get no enjoyment out of drinking alcohol"



8 in 10 consumers agree cannabis is better for a person than alcohol

While both substances are often used for recreational purposes, cannabis has been found to have a range of benefits that make it a more appealing choice over alcohol. Therefore, it is no surprise that those who've consumed alcohol in the past 12 months, agreed with the statement, **"I see more harm from alcohol use than cannabis use"** (81%).

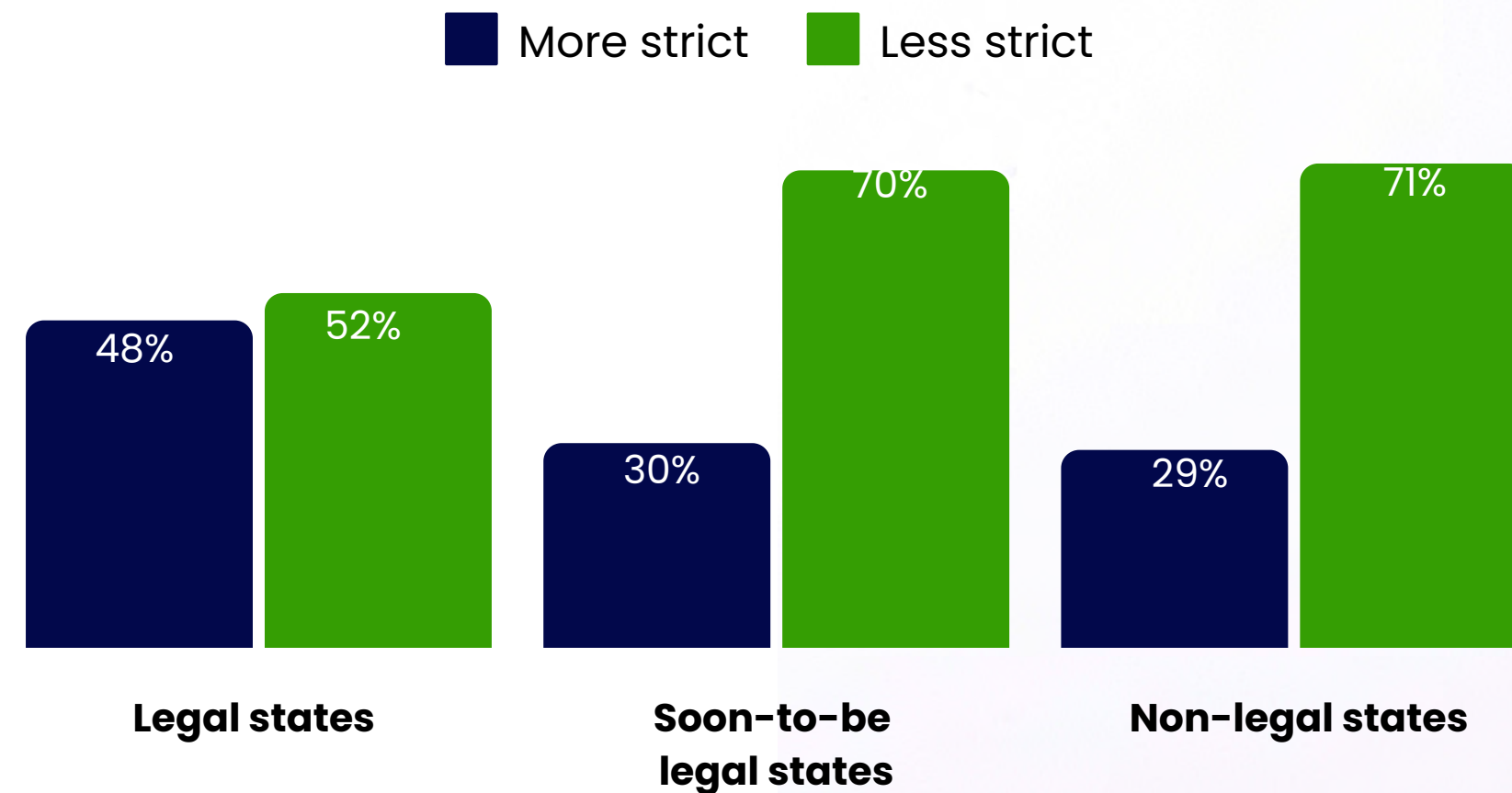
Additionally, 80% of all cannabis users, agreed that cannabis is better for a person than alcohol.

With this insight, dispensaries could **highlight the potential harms of excessive alcohol use**, including its negative effects on physical and mental health, and promote cannabis as a potentially safer alternative.

Impact of cannabis in the workplace

For some, company drug testing policies are rolling back

% of employed cannabis users that reported changes to drug testing policies in the past 2 years, by state legality



63% of employed consumers reported no changes to company drug testing policies around cannabis in the past 2 years

Among users that indicated there had been changes, 6 out of 10 said the policies at their place of employment around marijuana/cannabis became **less strict** (60%). Other users said they became more strict (40%).

Users from **non-legal cannabis states (71%)** and **anticipated soon-to-be legal states (70%)** were more likely to indicate their employment policies around marijuana/cannabis became less strict.

Most employed cannabis users report no work-mandated drug testing

As referenced in this report, cannabis users value the plant for its ability to help with anxiety and improve their overall happiness. So much so, consuming cannabis has become a daily ritual for many.

Luckily for most users, cannabis consumption has not impacted their employment status as **3 in 4 respondents indicated their employer does not require a drug test (73%)**.

Though, if an employer did require regular drug testing, it would influence

56% of cannabis users to quit or not apply. For more than 1 in 2, cannabis is more important than employment.

Over half of working cannabis users would be influenced to quit or not apply for a job that required regular drug testing

If an employer started requiring regular drug testing for cannabis, how much would it influence users to quit or not apply?

Influenced to quit / not apply

56%

Neutral

21%

Not influenced to quit / not apply

23%



Respondent profiles

All respondents have consumed cannabis in the past 12 months and primarily live in the U.S.

Gender	%
Female	55%
Male	44%
Other	1%

Employment	%
Full-time	49%
Unemployed	14%
Part-time	11%
Self-employed	9%
Retired	8%
Disabled	7%
Other	2%

Age	%
Baby Boomers / Silent Generation	13%
Gen X	26%
Millennials	45%
Gen Z	16%

Ethnicity/Race (Multiple select)	%
White	77%
Black or African-American	16%
Hispanic or Latino	9%
Native American or Alaska Native	4%
Asian	3%
Native Hawaiian or Pacific Islander	1%
Other	1%

Education	%
High school diploma or GED	30%
Some college, no degree	25%
Bachelor's (4 year) degree	16%
Associate (2 year) degree	9%
Master's degree	8%
Trade or technical school	5%
Doctorate degree	2%
Didn't graduate high school or earn GED	5%

Income	%
Less than \$35,000	40%
\$35,000 to \$74,999	33%
\$75,000 or more	27%

How Drive Research can help

Drive Research is a full-service market research company, providing custom qualitative and quantitative studies for organizations across the country. We provide a window into your customers' world so you can build successful business, sales, and marketing strategies.



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