



THE CANNABIS CONSUMER REPORT

ARCHETYPES, PREFERENCES AND TRENDS

CannaGather 

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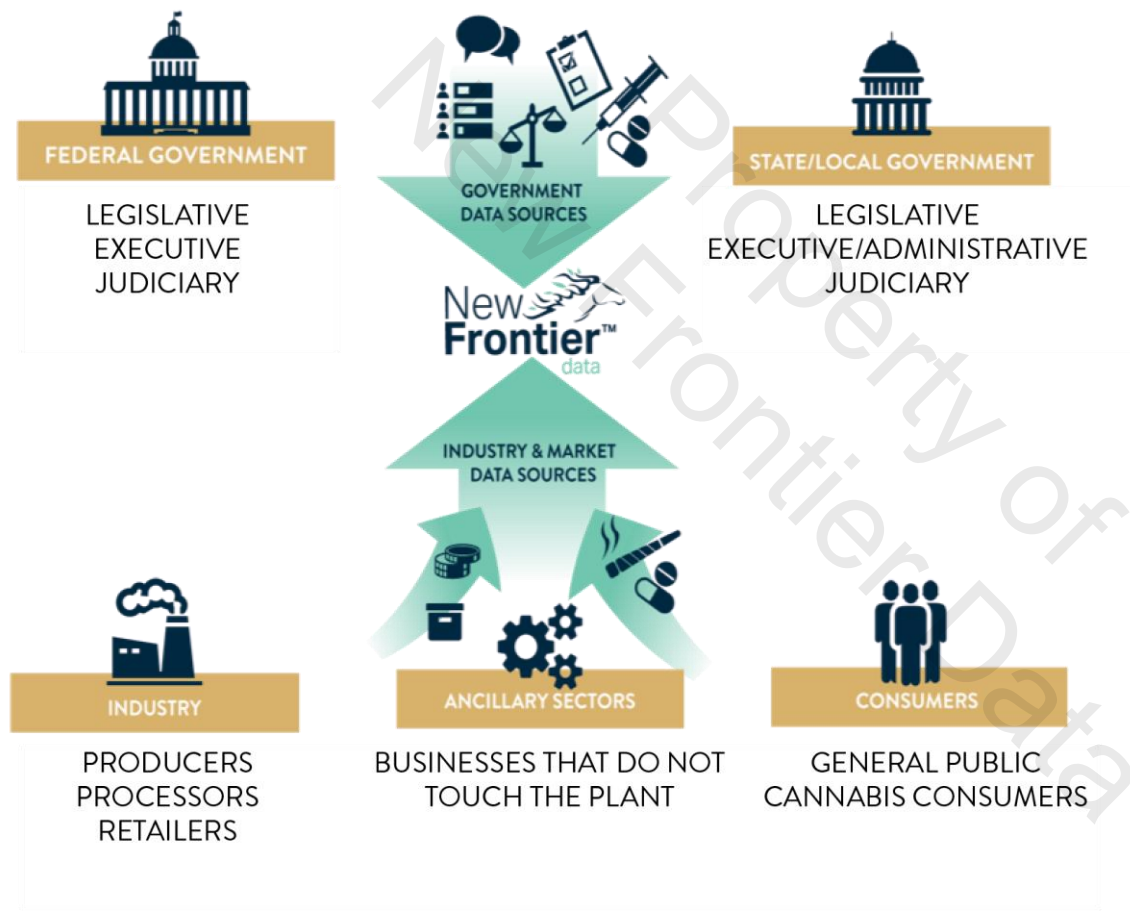
MISSION

New Frontier Data strives to be the cannabis data analysis and industry reporting authority by collecting reliable data, applying rigorous analysis, and producing actionable intelligence. We are committed to the highest level of objectivity and transparency as we endeavor to equip our customers with the knowledge necessary to increase profits, identify opportunities, and navigate this nascent and still underserved market space.

VISION

To be the World's Big Data Authority for the Cannabis Industry.

FIVE DIMENSIONS OF CANNABIS DATA



DATA ACROSS ALL FIVE DIMENSIONS IS CRITICAL TO UNDERSTAND AND EVALUATE THIS NEW SECTOR.

CANNABIS EXPERTISE

- Global leader in cannabis business intelligence and reporting
- Cited in over **81** countries
- Effective media reach of over **5.6 billion** in 2018

CUTTING EDGE TECHNOLOGY

- Applying leading technologies such as deep machine learning, neural-net-framework, and artificial intelligence
- Leveraging proprietary big data infrastructure to produce in-depth industry analytics and reveal real-time comprehensive insights

COMPREHENSIVE DATA

- Collecting and analyzing millions of data points worldwide
- Sourcing from governments, industry groups, and 100+ cannabis premier industry partners

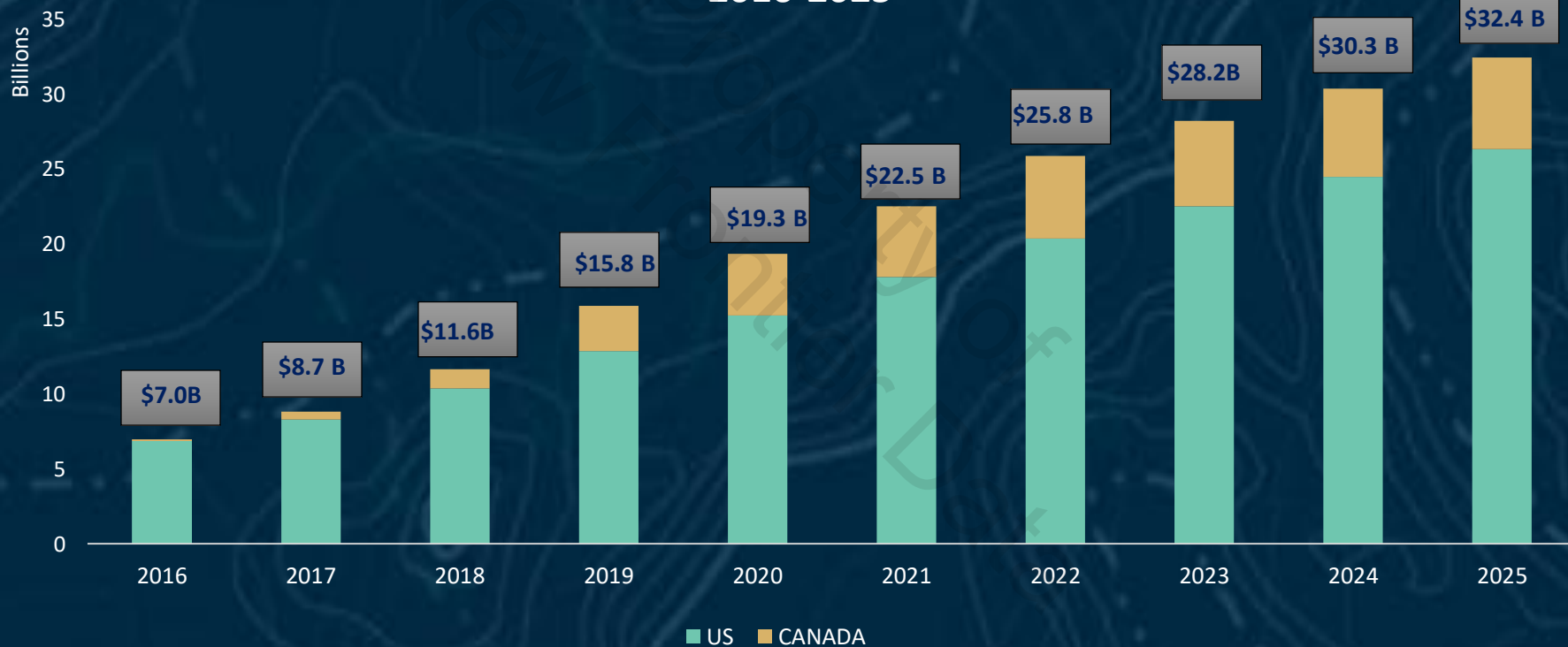
PARTNERSHIPS

- Committed to working hand-in-hand with our clients and partners
- Delivering the best possible work while keeping our counterparts' needs front-of-mind at all times



LEGAL CANNABIS WILL DRIVE SIGNIFICANT REVENUE IN NORTH AMERICA

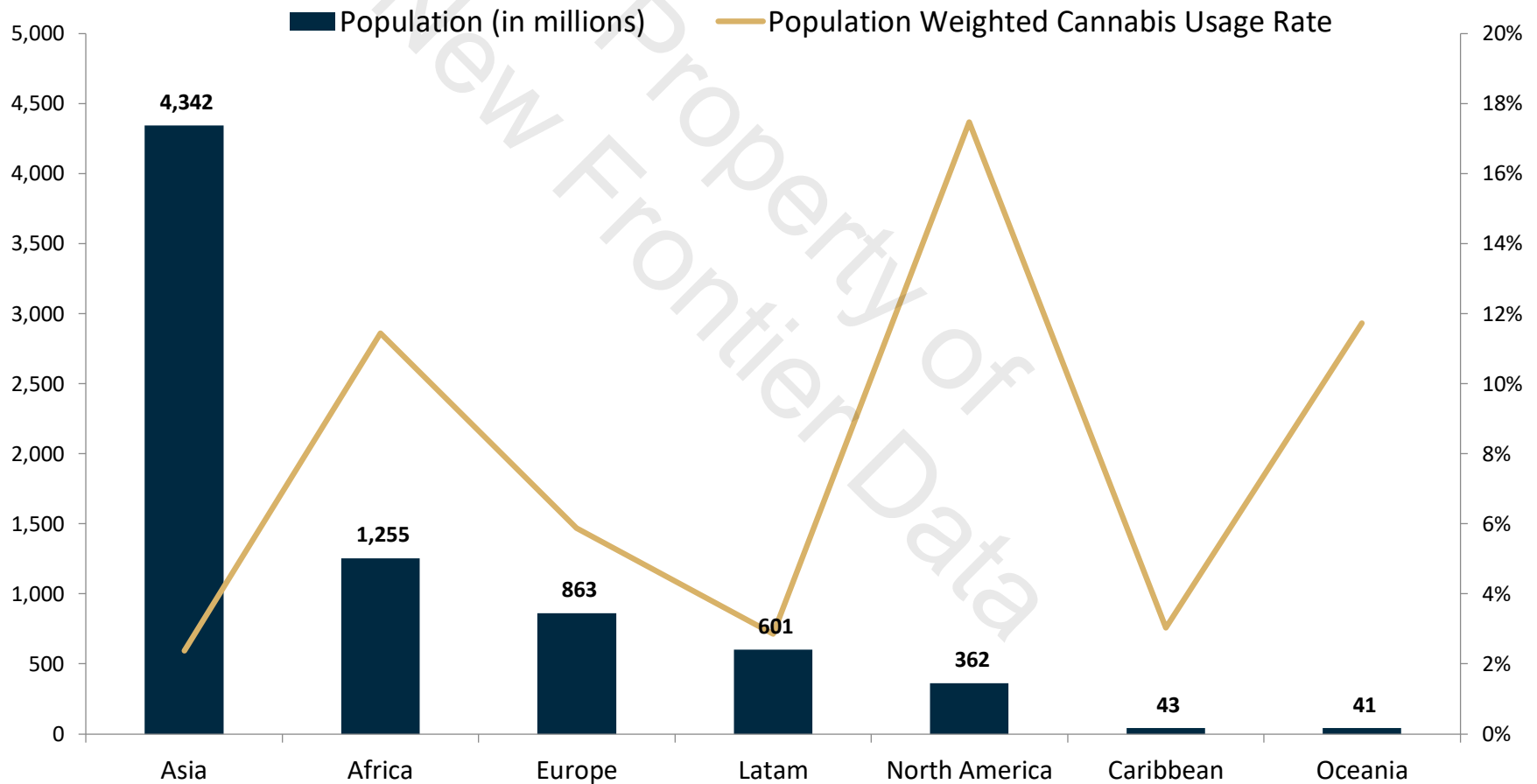
U.S and Canada Combined Legal Cannabis Markets 2016-2025



By 2025, the combined U.S. & Canadian cannabis markets will generate over \$30 billion in sales.

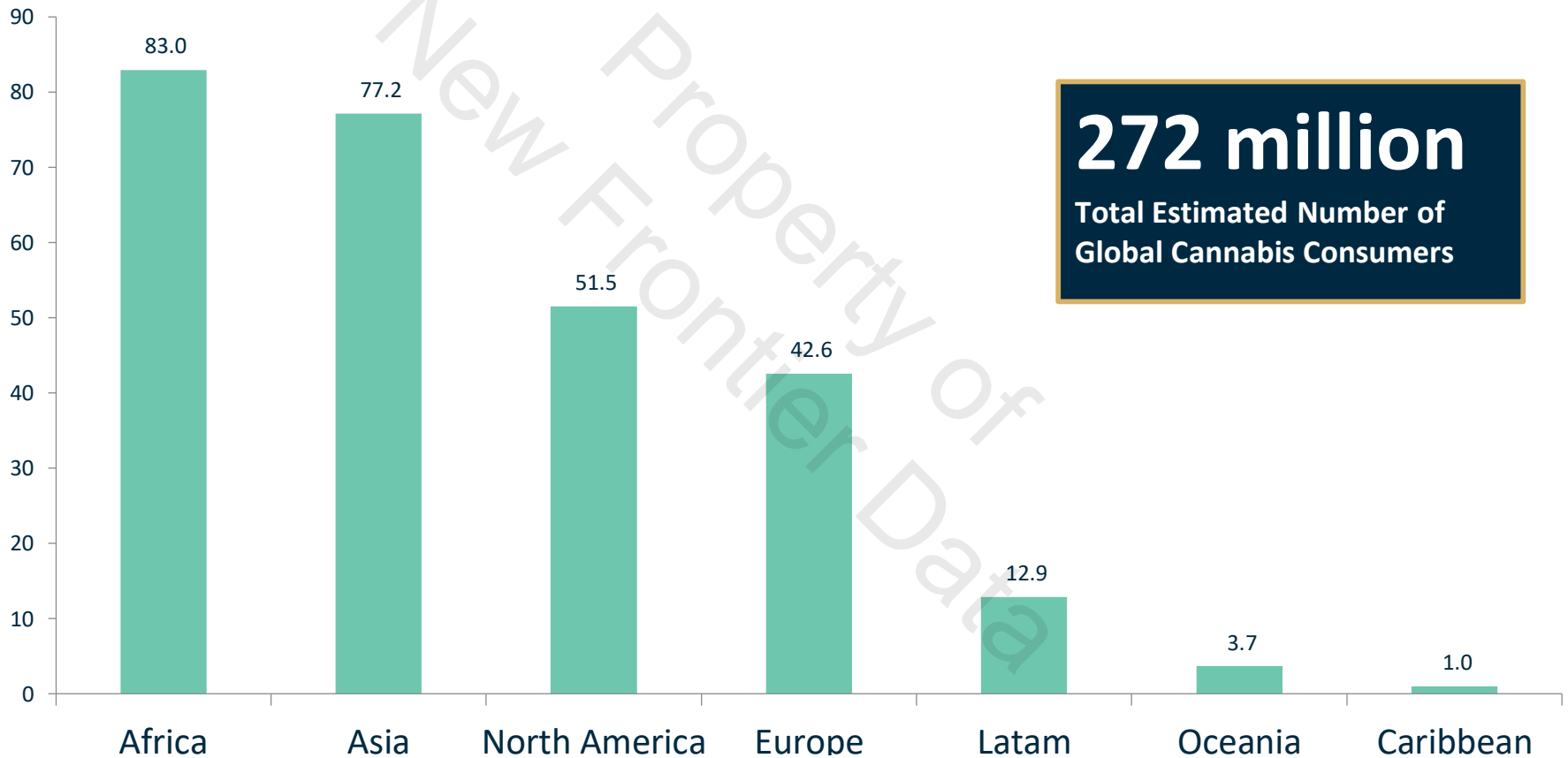
A GROWING NUMBER OF GLOBAL CANNABIS CONSUMERS

Population and Percentage of Cannabis Consumers

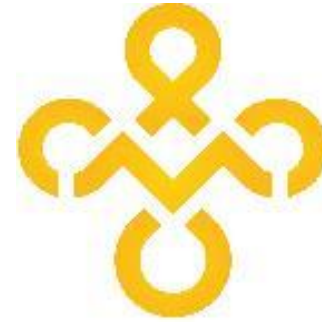


A GROWING NUMBER OF GLOBAL CANNABIS CONSUMERS

Estimated Number of Cannabis Consumers by Region
(in millions)



ABOUT THE REPORT



MJ FREEWAY

- Ground-breaking cannabis consumer survey
- 3,000+ responses
- Adult use, medical and illicit markets
- Industry leading market analytics
- Leading cannabis business technology provider
- Billions of dollars in retail transactions processed in a majority of U.S. states
- Deep operational intelligence

The background of the slide is a dark blue topographic map with white contour lines. The lines are irregular and wavy, representing elevation changes. Some lines are solid, while others are dashed. The overall pattern is complex and organic.

WHO ARE THE ARCHETYPES?

THE 9 CANNABIS CONSUMER ARCHETYPES

User Type	Archetype	Archetype profile
Heavy	Traditional Lifestylers	The classic consumer
	Modern Lifestylers	The Cannabis 2.0 consumer
	Functional Dependents	The extreme consumer
Moderate	Medical Purists	Cannabis for health and wellness
	Weekend Enthusiasts	Moderate leisure use
	Discreet Unwinders	Passionate but secret use
Light	Social Opportunists	The communal sharer
	Silver Dabblers	The occasional indulgers
	Infrequent Conservatives	The greying traditionalists

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WHAT DEFINES THE ARCHETYPES?

YOUNGER ADULTS MAKE UP THE HEAVIEST USE ARCHETYPES

User Type	Archetype	Average Age		Young (18-34)	Middle (35-54)	Older (55+)
Heavy	Traditional Lifestylers	34		58%	36%	6%
	Modern Lifestylers	35		56%	39%	5%
	Functional Dependents	34		54%	45%	1%
Moderate	Medical Purists	44		31%	38%	30%
	Weekend Enthusiasts	41		35%	52%	13%
	Discreet Unwinders	57		0%	43%	57%
Light	Social Opportunists	39		44%	39%	17%
	Silver Dabblers	50		19%	36%	45%
	Infrequent Conservatives	56		5%	34%	60%
	The Average Consumer	43		35%	40%	26%

THE TWO HEAVIEST USER GROUPS ARE MORE GENDER BALANCED THAN LIGHTER USERS

Male and female heavier users tend to have much more in common than lighter consuming groups, who are older and have much more varied targeted reasons for use.

	GENDER	
	Male	Female
Traditional Lifestylers	58%	41%
Modern Lifestylers	56%	44%
Functional Dependents	74%	26%
Medical Purists	24%	76%
Weekend Enthusiasts	58%	42%
Discreet Unwinders	0%	100%
Social Opportunists	0%	99%
Silver Dabblers	100%	0%
Infrequent Conservatives	100%	0%
The Average Consumer	50%	50%

THE THREE CONSUMER GROUPS CONSUME AT LEAST WEEKLY

Overall, seven in ten consumers say they use cannabis at least once monthly.

Over nine in ten of the most frequent consumers use cannabis at least weekly.

	Frequency of Use		
	At least once per day	At least once per week	At least once per month
Traditional Lifestylers	65%	93%	97%
Modern Lifestylers	68%	96%	99%
Functional Dependents	79%	97%	99%
Medical Purists	27%	50%	70%
Weekend Enthusiasts	46%	82%	95%
Discreet Unwinders	32%	45%	58%
Social Opportunists	6%	22%	39%
Silver Dabblers	20%	40%	54%
Infrequent Conservatives	11%	31%	40%
The Average Consumer	36%	58%	70%

TRADITIONAL LIFETSYLERS AND DISCREET UNWINDERS STARTED USING CANNABIS EARLIEST

People who start consuming early tend to be more passionate about cannabis, and more intense in their use. They also tend to be more open about their use.

Discreet Unwinders are the exception. They starting consuming cannabis early but have remained very secretive about their use.

	Age of First Use		
Age of First Use	Under 20	under 17	21+
Traditional Lifestylers	78%	50%	22%
Modern Lifestylers	64%	40%	36%
Functional Dependents	39%	15%	61%
Medical Purists	67%	41%	33%
Weekend Enthusiasts	60%	30%	40%
Discreet Unwinders	70%	47%	30%
Social Opportunists	72%	42%	28%
Silver Dabblers	72%	40%	28%
Infrequent Conservatives	72%	36%	28%
The Average Consumer	68%	40%	32%

MODERN LIFESTYLERS ARE DRIVING RETAIL SALES IN LEGAL MARKETS

Modern Lifestylers are leading the transition into the legal market, but most consumers continue to rely on friends and private dealers.

PURCHASE SOURCE: ADULT USE MARKET CONSUMERS ONLY

	Someone I know	A business		Friends	Private dealer	Brick & Mortar dispensary	Online dispensary	I grow my own	Online delivery service	Other
Traditional Lifestylers	70%	26%		30%	40%	17%	5%	2%	3%	2%
Modern Lifestylers	42%	54%		16%	26%	37%	8%	2%	9%	2%
Functional Dependents	36%	48%		17%	19%	18%	16%	16%	14%	0%
Medical Purists	48%	45%		31%	17%	32%	9%	3%	5%	4%
Weekend Enthusiasts	62%	33%		26%	36%	21%	6%	4%	5%	2%
Discreet Unwinders	66%	20%		46%	20%	17%	2%	6%	1%	8%
Social Opportunists	78%	15%		64%	14%	13%	2%	2%	0%	5%
Silver Dabblers	76%	16%		51%	25%	13%	1%	4%	1%	5%
Infrequent Conservatives	71%	17%		53%	18%	14%	1%	7%	2%	5%
The Average Consumer	64%	28%		40%	24%	20%	5%	4%	4%	4%

RELAXATION DRIVES USES FOR ALL CONSUMERS, BUT IMPORTANCE OF OTHER USES VARY WIDELY

Consumers use cannabis for a rich diversity of reasons that blend medical and recreational applications.

THE 7 REASONS FOR USE										
	Traditional lifestylers	Modern Lifestylers	Functional Dependents	Medical Purists	Weekend Enthusiasts	Discreet Unwinders	Social Opportunists	Silver Dabblers	Infrequent Conservatives	The Average Consumer
1.Relaxation	74%	67%	46%	61%	68%	60%	65%	72%	68%	66%
2.Stress relief	70%	74%	36%	61%	65%	55%	56%	55%	46%	59%
3.Reduce anxiety	66%	68%	31%	59%	55%	48%	50%	45%	36%	53%
4.Improve sleep quality	55%	60%	30%	49%	46%	39%	35%	36%	26%	43%
5.Pain management	47%	54%	29%	60%	39%	53%	33%	30%	30%	42%
6. Help falling asleep	48%	60%	29%	47%	39%	37%	36%	32%	26%	40%
7. Enjoy social experiences	39%	36%	33%	22%	33%	19%	32%	39%	31%	32%

HIGH LEVEL FINDINGS



HIGH LEVEL TAKEAWAYS

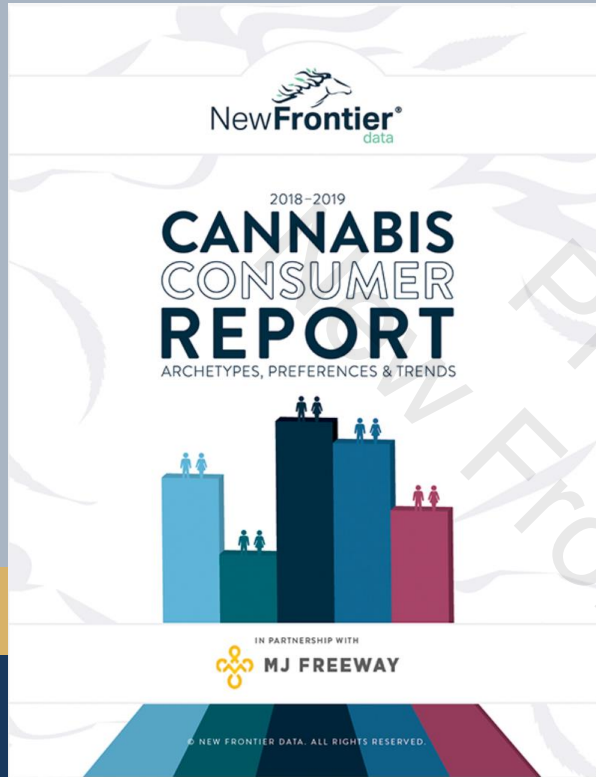
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KEY TAKEAWAYS

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