

APRIL 10, 2020



The Foundation for a Consumer-Centric Digital Strategy

Joined by our friends at **zenzi** 

**If you are trying to appeal
to everyone, then you are
appealing to no one.**





Agenda

- Welcome & Introductions
- COVID-19 Impact Overview
- Marketing Opportunities and Persona Deep-Dive
- Becoming Consumer-Centric
- Resources and Next Steps



Bethany Gomez

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A little bit about Brightfield.

Who we are:

We provide multi-source consumer insights and market intelligence for the CBD and Cannabis industries. We have been answering difficult business questions with data-driven answers for these industries since 2015.



Our methodology:

We take a modern approach to a modern industry.

By integrating innovative technologies like machine learning, social listening, and natural language processing with robust human analysis across brand shares, market sizing, and more, we get a 360-degree view of the CBD and Cannabis industries.

We leveraged several sources for our COVID-19 analysis:



Social Listening Data

Tracking conversations about COVID-19, CBD and Cannabis.



Survey Data

Measuring impact to consumer's purchasing attitudes.



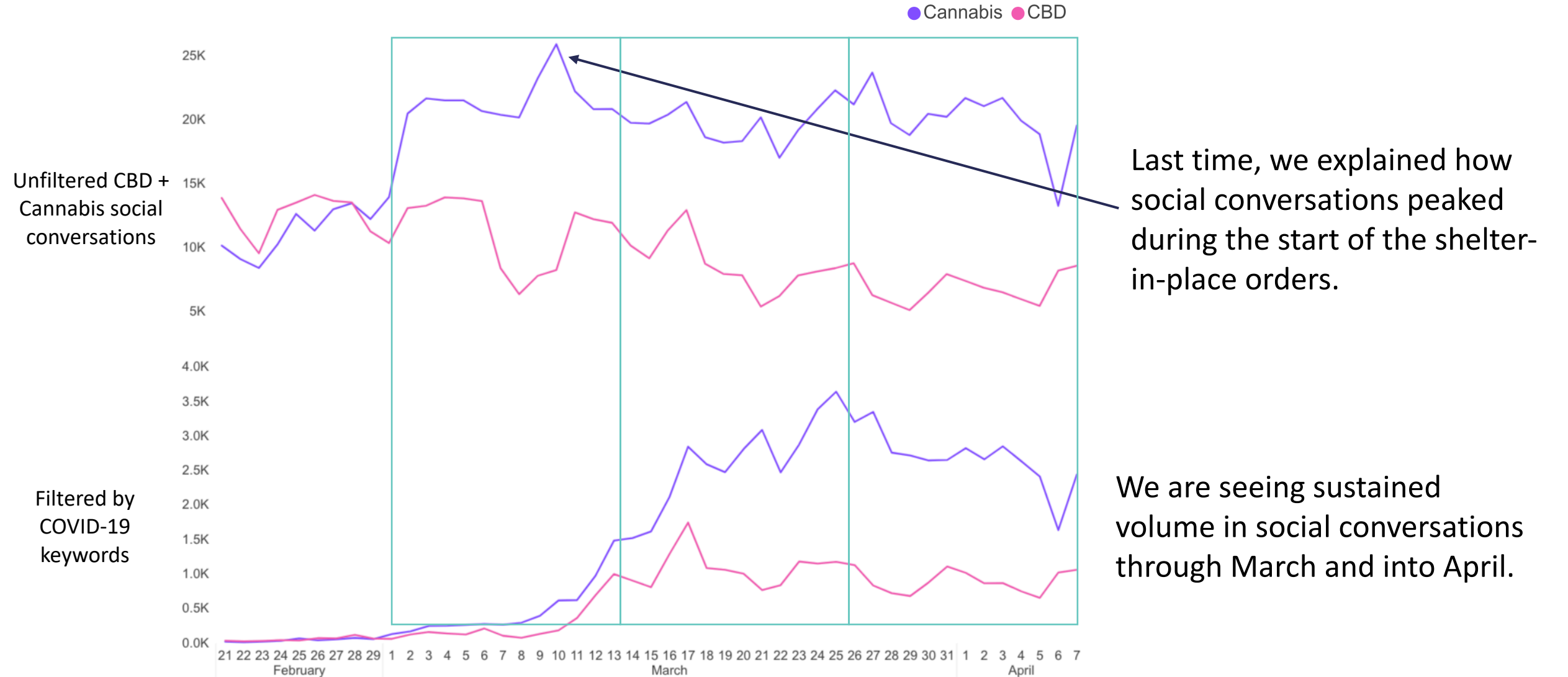
Interviews with Brands & Data Share Agreements

Providing insight on sales and channel impacts throughout the supply chain.



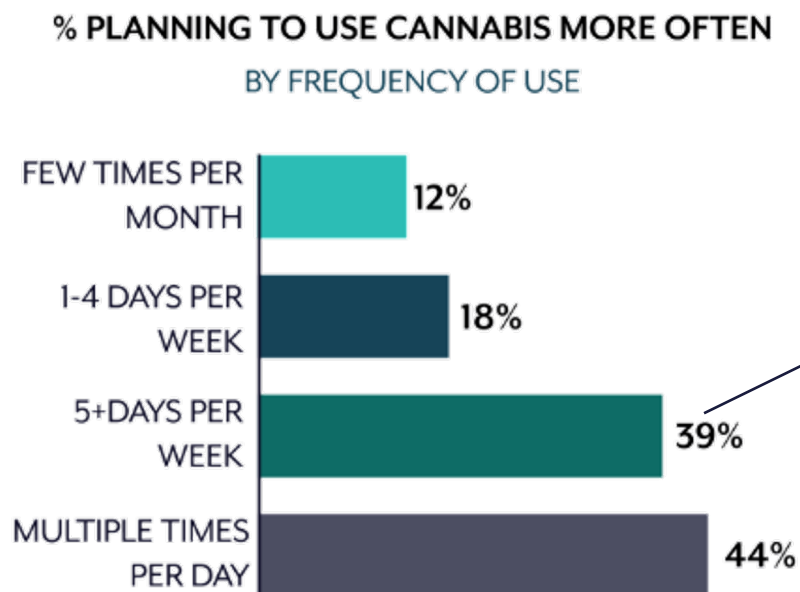
Overview

Social Conversations: March vs. April



Consumption frequency has accelerated in the last three weeks.

Changes in Cannabis Use By Frequency



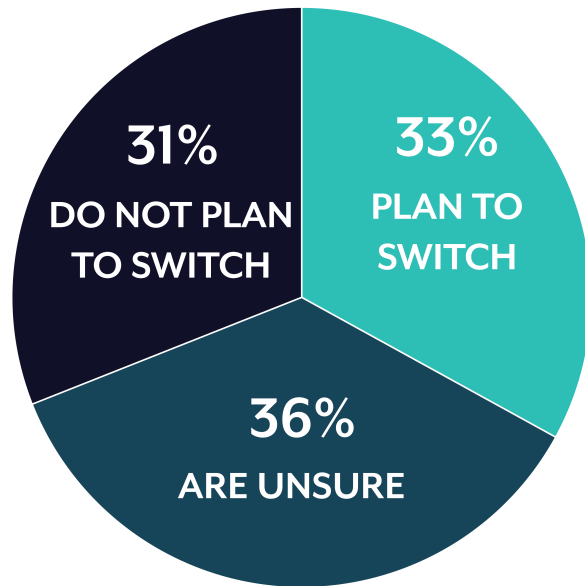
Cannabis consumers who use 5+ times per week make up 48.5% of overall cannabis users. These are the users who report plans to increase consumption most significantly!

What does this mean for sales and consumer demand?

Many consumers are switching to online options.

Changes in CBD Purchasing Habits

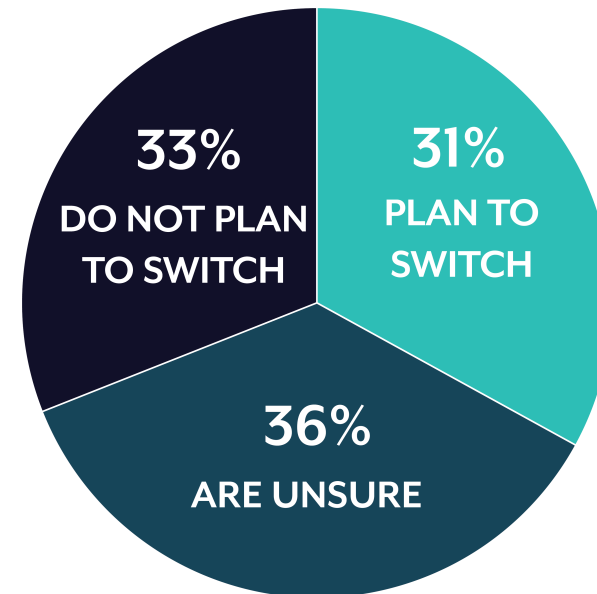
Will consumers switch to ecommerce?



Source: Brightfield Group COVID CBD Consumer Survey, N=: 2,638

Changes in Cannabis Purchasing Habits

Will consumers switch to delivery or click and collect?

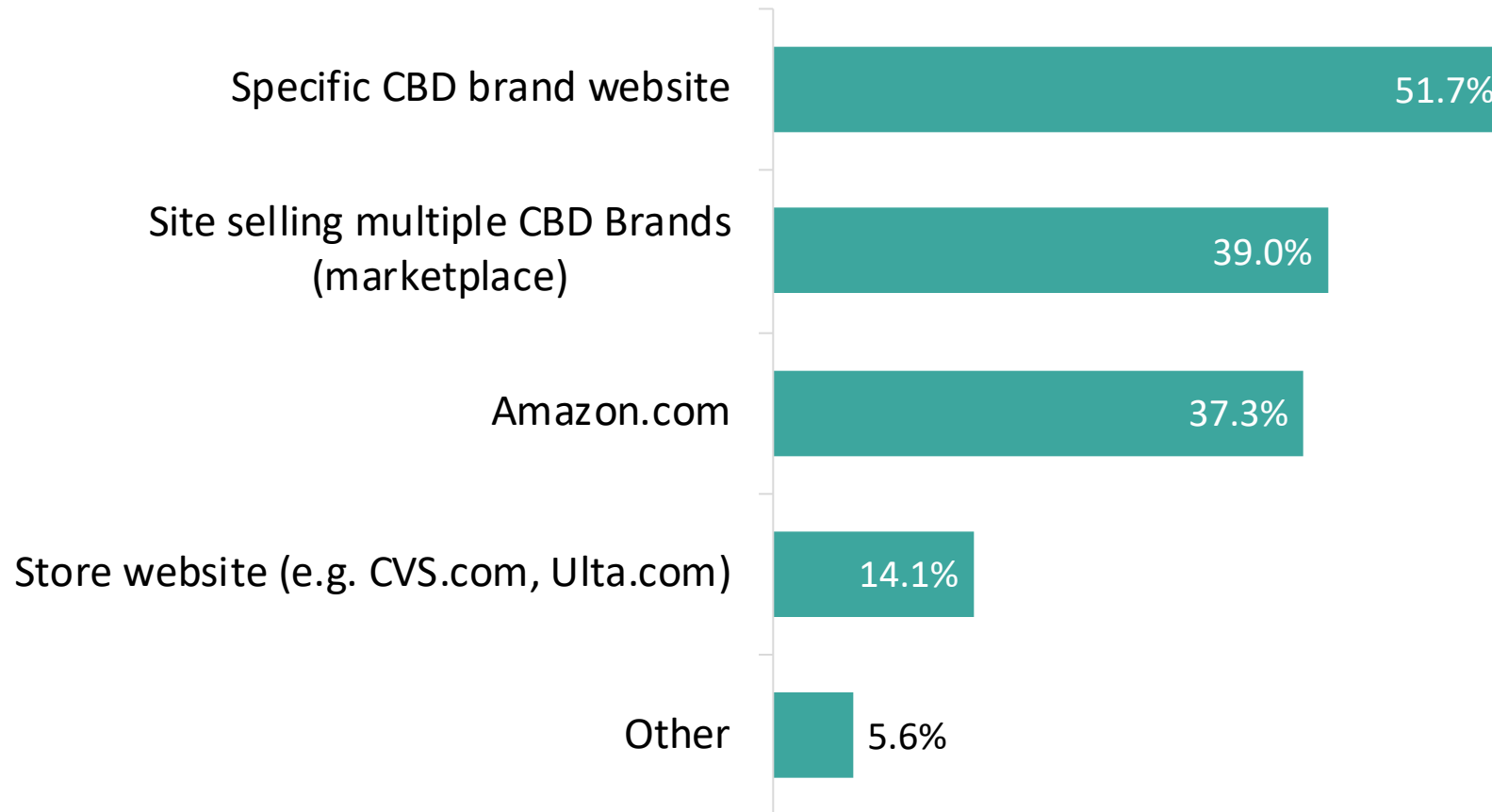


Source: Brightfield Group COVID Cannabis Consumer Survey, N=2,217

Marketing Opportunities



27% of CBD consumers say they bought CBD online in the last six months. But which online channels are best?



Q: Where online do you purchase your CBD products? Select all that apply.

Source: Brightfield Group Quarter CBD Consumer Survey, Q4 2019 and Q1 2020, N = 11,429

Note: Q1 2020 results were pulled before the end of survey fielding, so final Q1 2020 sample size will be slightly larger. However, results are considered stable at this time.

Where's the opportunity to build deeper customer relationships in Cannabis?

29%

of Cannabis Consumers prefer ads that include samples or coupons.

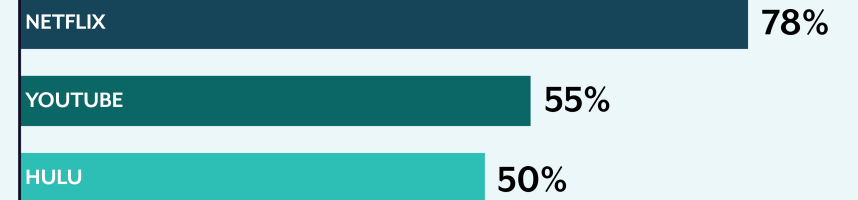
67%

of Cannabis Consumers believe consumer reviews are very important when choosing new products.

46%

of Cannabis Consumers believe celebrities usually make a brand more fashionable.

CANNABIS CONSUMERS TOP USED TV PLATFORMS



Divorced Dads are the most likely to watch **Network Television**.



Single Yuppies are the most likely to watch **Netflix**.



Persona Deep-Dive

Who are the Stressed-Out Millennials?

Definition: Millennials that report using CBD for psychological reasons (e.g. anxiety, depression, insomnia)

Motto: “There’s always too much”

How to Reach: Understand SOM’s motivators and stressors - especially during COVID-19 - and create content that supports their values.



45%

of Online CBD Consumers are Millennials.

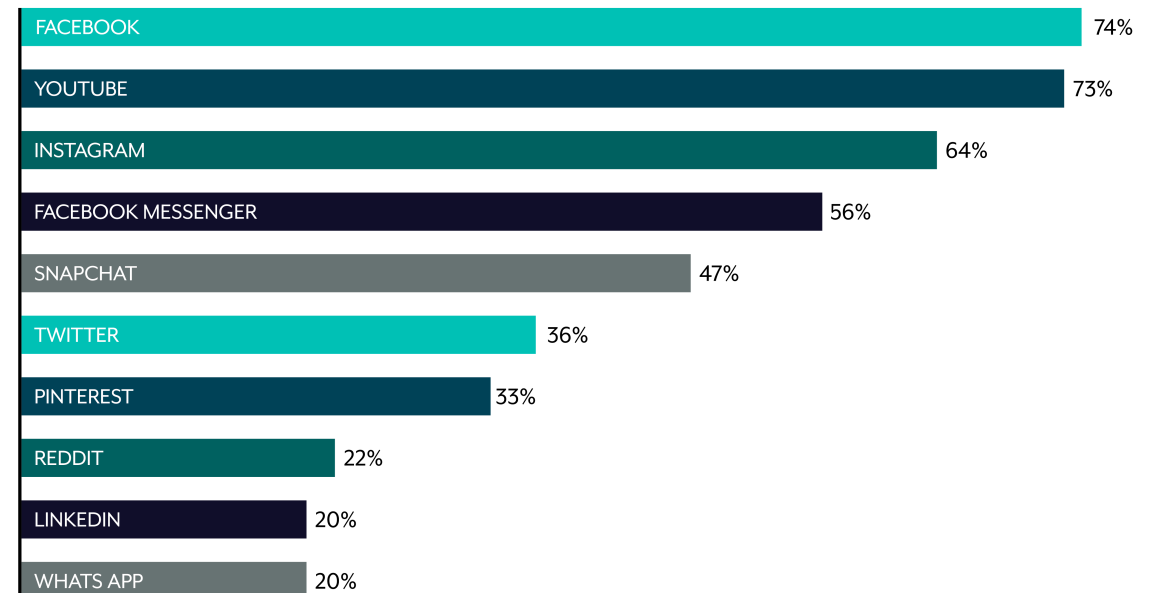
58%

of Millennial CBD Consumers planned to stock up for COVID-19.

41%

of Millennial CBD Consumers planned to switch to online for COVID-19.

Millennial Cannabis Consumers Most Used Social Media Platforms





Becoming Consumer-Centric

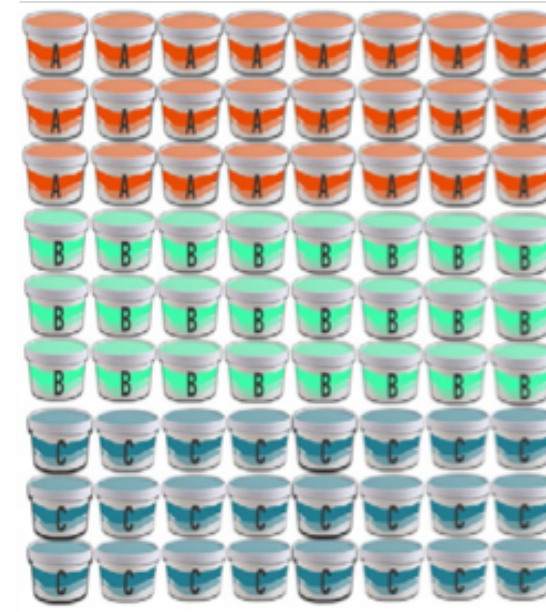
State of the Industry

- Now more than ever, it's not just a brand's products and pricing that matter – **it's what you stand for.**
- People want to buy from companies that fill a deeper psychological need in our lives.
- For marketers, this means that emotional connection and personalization is critical to building loyalty and awareness.



The Key to Building Loyalty: Values

Values are the core motivations that define our individuality, humanity, and what we want out of life. Formed at an early age, they operate on a subconscious level and are highly influential in our decision making.

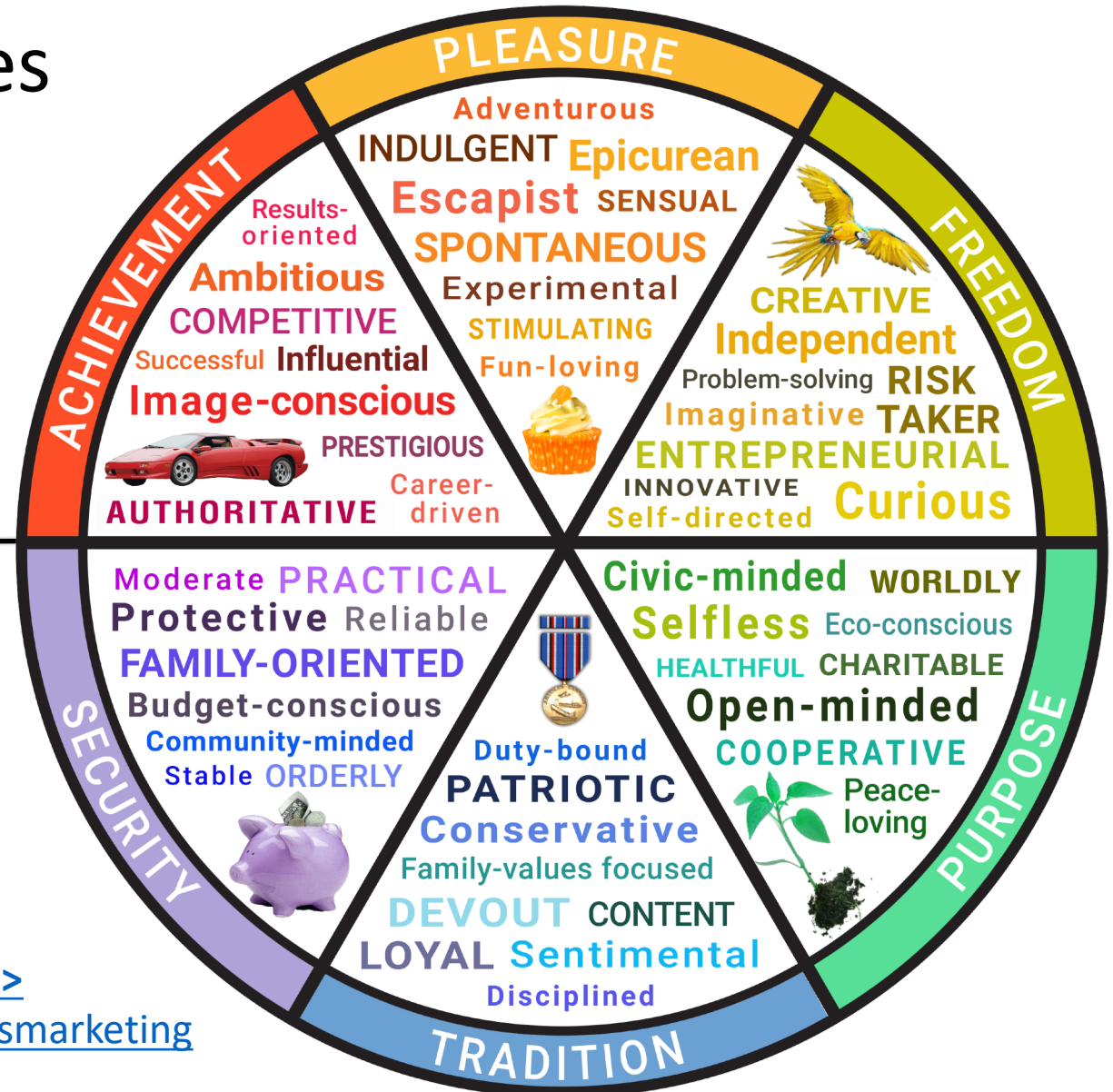


The Six Primary Value Types

Primarily focused on personal needs (Individualistic)



Primarily focused on needs of others (Collectivist)



[Take the survey>>>](http://bit.ly/valuesmarketing)

<http://bit.ly/valuesmarketing>

Speaking to Millennial Values

Stand for Something

Align With Values

Attract your Tribe

Collaborate



**"People don't buy
what you do; *they*
buy why you do it."**

- Simon Sinek





Stand for Something

- Don't sell your products, sell your purpose.
- Millennials want brands to be doing good in the world and making a difference.
- Diversity and inclusion are important to them.
- Build their trust and credibility by showing them how you are living your values every day.




 dunkin  • Follow

 dunkin  "Not only do we drink Dunkin' to keep us fueled in the ER, but we also drink it on our days off. Dunkin' keeps us energized and going during long days. As a front line worker the days are long and the anxiety is high, but I work with an incredible team in the ER. We're supported not only by Dunkin', but our local community too." - Meghan Holowaychuk, VCU Pediatric ER ❤️

2d



Dunkin' Donuts
Mar 17 2020 11:26 AM UTC 



Carousel

We've got your back. Proud to keep America runnin', and here for you no matter what. ❤️

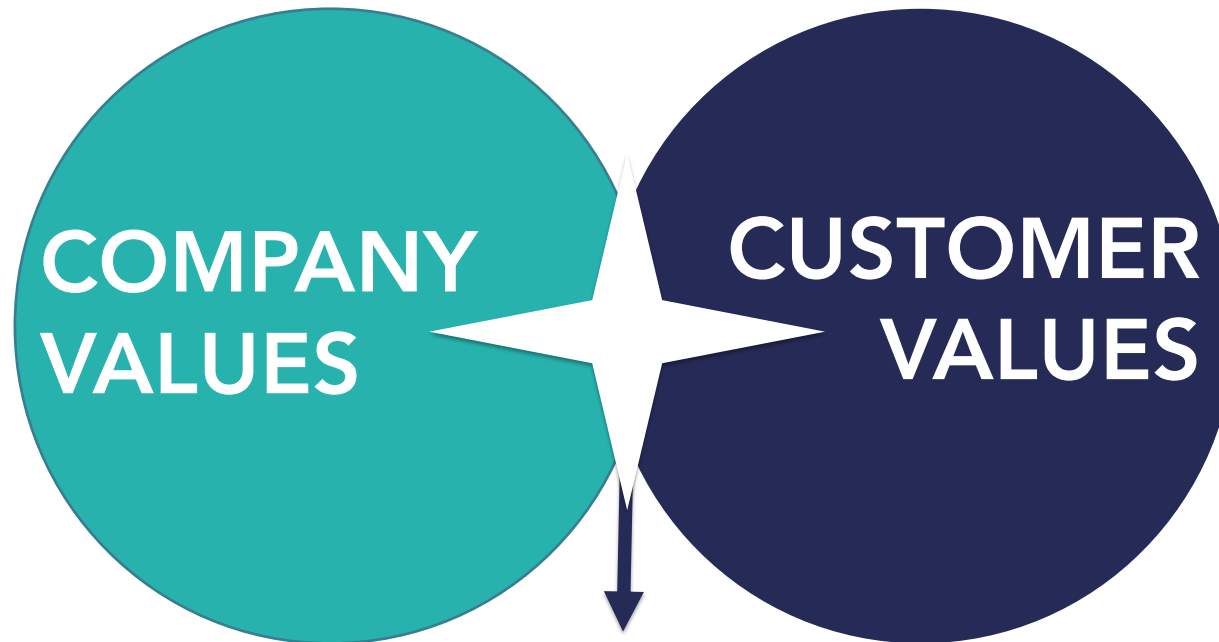
WE'RE HERE FOR YOU

It's our top priority to keep our guests and crew safe



Align with Values

When forming long-term relationships with brands, people are far more likely to be motivated by messaging that respects the deeper principles they stand for.



Attract Your Tribe

- Even more so than others, Millennials demand authenticity and transparency and hate feeling "marketed to."
- Content should be lively, entertaining and interactive, not just fact-based.
- Add value through loyalty programs, recognition events, special access & offers.
- Find people who resonate with your message and nurture that relationship.



Wendy's 
@Wendys

Is it a garbage truck?



Adam Fyn @adamfyn · Jan 23
@Wendys what would you call this?



12:07 PM · Jan 23, 2020 · [Twitter Web App](#)

150.6K Retweets 1M Likes <<<One Million Likes!!

When you build a relationship
based on a shared set of beliefs
& values – trust is established.

Collaborate

- Millennials want to be co-creators, taking an active role in shaping the brand so they feel a sense of ownership.
- Real-time communication is mandatory.
- Recommendations and reviews are more trustworthy than brand messaging.
- They thrive when given the opportunity to personalize their experience with your brand.

6,400 Comments!! >>>



Ask yourself these questions

- ✓ What inner needs and desires drive your customers?
- ✓ How do you fill a deeper need in their lives?
- ✓ What values are most aligned with your brand?
- ✓ Should your brand take a stand on social issues?
- ✓ How do you choose the right cause?
- ✓ How do values affect sales messaging?
- ✓ How do values play into loyalty programs?



Resources and Next Steps



Identify what you stand for.

Whether you know it or not, you are projecting something to consumers. Strong brands are often able to survive during difficult times.



Monitor the COVID-19 Insights Resource center

<https://www.brightfieldgroup.com/covid-19>



Connect with your Account Manager

For strategy and planning support due to COVID-19. The Values model and additional capabilities will be included in your upcoming refresh.

Thank you!

If you have any questions or would like to learn more, please reach out to marketing@brightfieldgroup.com

To complete the Values survey on your own, please click [here](#).



BRIGHTFIELD GROUP