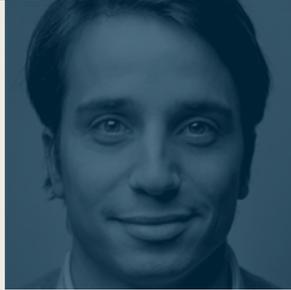
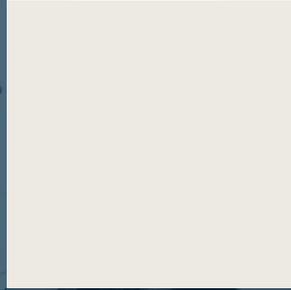
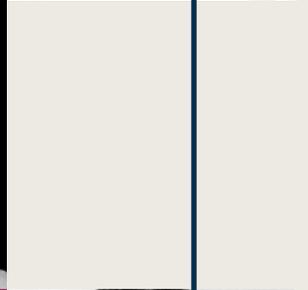
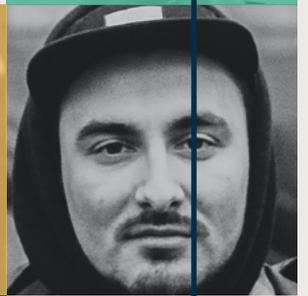
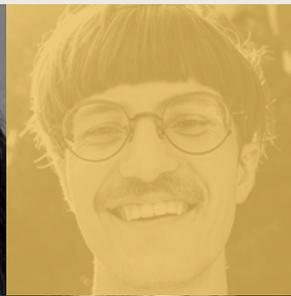




Cannabis & Wellness

A New Consumer Paradigm



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Letter from the Publisher

Last year, cannabis consumption among college students reached its highest level in over 35 years while students reported significantly lower alcohol use compared to 2019. As cannabis consumption continues to normalize across the U.S., well-established science on the negative health effects of alcohol has led more consumers to explore cannabis as a healthier, safer alternative.

Cannabis consumption as an alternative to alcohol is just one of the practices that consumers are incorporating into a holistic approach to health, well-being, and self-care. For operators in the industry seeking to capitalize on this evolving dynamic, it is important to understand the nuances of each unique use case to articulate how their offerings can contribute to wellness practices with products that meet those needs.

Our latest report, ***Cannabis & Wellness: A New Consumer Paradigm***, provides an understanding of cannabis as a tool for health and wellness and illustrates unique use cases for medical, mental wellness, physical fitness, and alcohol replacement purposes. From cannabis-friendly yoga classes to social lounges as alternatives to traditional bars, the growing acceptability of cannabis outside of the home and in regulated public and social spaces provide numerous options for consumers to partake to enhance their physical, mental, and social well-being.

As is the case with all our reports, available through New Frontier Data's cannabis intelligence platform Equio®, we trust you will benefit from this fact-based, unbiased, and actionable analysis, and from our unwavering commitment to help you best understand, assess, engage, and transact with the cannabis industry and its consumers, responsibly and knowledgeably.



Giadha A. DeCarcner

Founder, Publisher & Executive Chair
New Frontier Data



Strength in Knowledge®

About New Frontier Data

New Frontier Data is the premier data, analytics and technology firm specializing in the global cannabis industry, delivering solutions that enable investors, operators, advertisers, brands, researchers and policy makers to assess, understand, engage and transact with the cannabis industry and its consumers. New Frontier Data's global reach and reputation is evidenced by research and analysis citations in more than 85 countries. Founded in 2014, New Frontier Data is headquartered in Washington, D.C. with a presence in Europe, Latin America and Africa.

Mission

New Frontier Data's mission is to inform policy and commercial activity for the global legal cannabis industry. We maintain a neutral position on the merits of cannabis legalization through comprehensive and transparent data analysis and projections that shape industry trends, dynamics, demand and opportunity drivers.

Core Values

- Honesty
- Respect
- Understanding

Vision

To be the nexus of data for the global cannabis industry.

Commitment to Our Clients

The trusted one-stop shop for cannabis business intelligence, New Frontier Data provides individuals and organizations operating, researching, or investing in the cannabis industry with unparalleled access to actionable industry intelligence and insight, helping them leverage the power of big data to succeed in a fast-paced and dynamic market. We are committed to the highest standards and most rigorous protocols in data collection, analysis, and reporting, protecting all IP and sources, as we continue to improve transparency into the global cannabis industry.

For more information about New Frontier Data, please visit: NewFrontierData.com.



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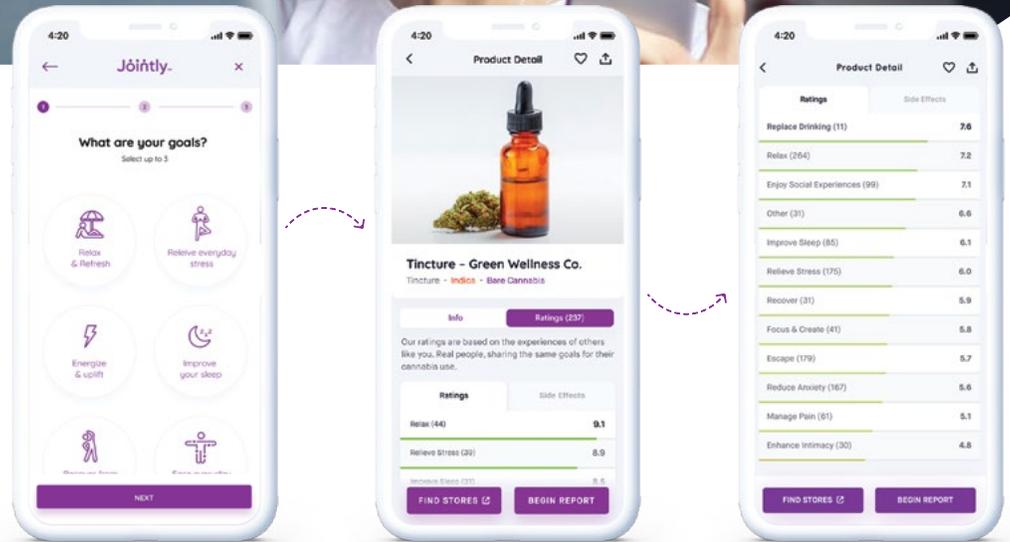
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Introduction

The last few years have provided new insights to the dramatic rapid expansion of the cannabis industry. As new markets have opened and a broadening range of products been introduced, consumers have had unprecedented opportunities to engage with cannabis on their terms. Last year, a record 68% of Americans told Gallup pollsters that marijuana should be legalized. In July, nearly half of U.S. adults claimed to have consumed cannabis at some point during their lives. Scientific understanding of the plant has expanded, along with a more nuanced appreciation for potential benefits which cannabis may provide. As awareness has expanded, so too has understanding about how and why a wide variety of individuals choose to consume cannabis. Even among consumers who generally claim to consume cannabis for health and wellness reasons, there is a great deal of variability when it comes to the methods and motives behind their choices to partake.

For the last several decades, cannabis consumption has been classified into a binary of medical or recreational use, but [recent consumer research](#) has challenged that framework, finding that more than half (51%) of consumers report using for both medical and recreational reasons (New Frontier Data, 2021).

The current era of prohibition reform and a resultant lessening of stigma has meant that more people are coming to see cannabis occupy a space between recreational and medical, i.e., wellness.

What exactly “wellness” means to a given consumer varies widely across individuals; people use cannabis for a variety of health and wellness reasons. Those can encompass anything from consumption to prevent flare-ups of known medical conditions, or meditation and mindfulness practices incorporating cannabis use, substituting cannabis for another activity deemed by the consumers to be less healthy, relaxing by consuming with friends, or using cannabis before a run or a session at the gym.

Data and archetypes presented in this report are from a nationally representative survey of cannabis consumers from across the U.S. More detailed findings can be found in New Frontier Data’s [2021 Cannabis Consumer Evolution](#) report.



Cannabis for Health & Wellness

Roughly one-quarter (23%) of current consumers named improving overall health and wellness as a reason for using cannabis. Younger consumers tend to be more likely than are older consumers to use cannabis specifically for wellness, indicating a view which may become more entrenched in the future.

Consumers' general experience of the impact of cannabis on their lives is overwhelmingly positive.

This report examines various facets of health and wellness, and patterns of related use among current U.S. consumers. For each aspect of health and wellness, respective representatives of New Frontier Data's cannabis consumer archetypes will illustrate how consumers use cannabis in practice for health and wellness.

Share of Consumers Who Use Cannabis to Increase Overall Wellness

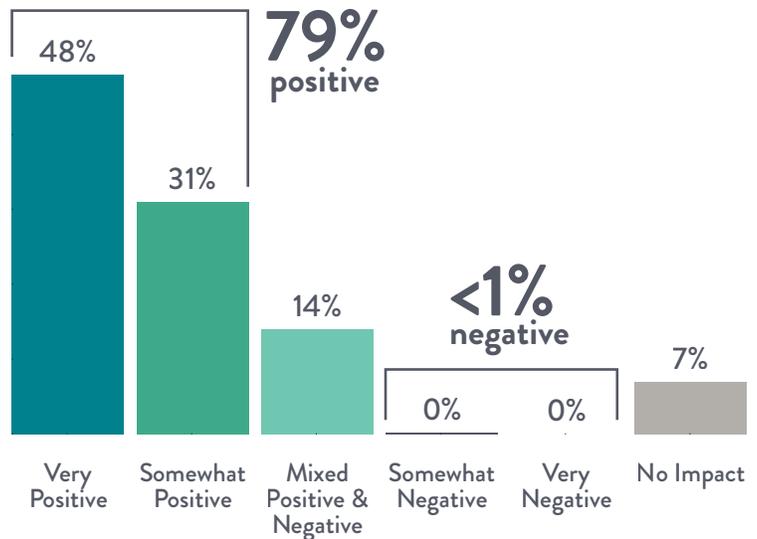
By age

23%

of current consumers use cannabis to promote general wellness



"Overall, what impact has cannabis had on your life?"



Above charts: Among current consumers.





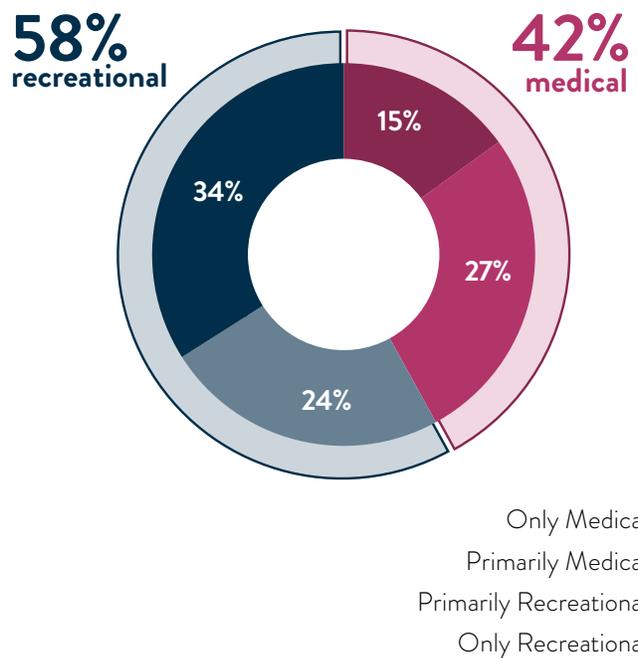
Medical Use

THE USE OF CANNABIS to treat or manage a medical condition is the most direct, evident application of cannabis to promote health and wellness, and the share of consumers who use cannabis medically is growing.

“Medical consumers” are those who characterize their cannabis use as either “only” or “primarily” medical. The identification is unrelated to the laws of the state in which a consumer resides; self-identified medical consumers are distributed across regulated medical and adult-use markets as well as illicit markets. Similarly, identifying as medical cannabis consumers does not preclude the same individuals from also consuming cannabis recreationally.

The increase in self-identified medical consumers likely signifies a confluence of factors: growing awareness of myriad medical/health applications of cannabis, lessening stigma and criminalization, increased access, and wider availability of a broad range of forms and formulations which lend themselves to wellness applications.

Consumer Self-Identification



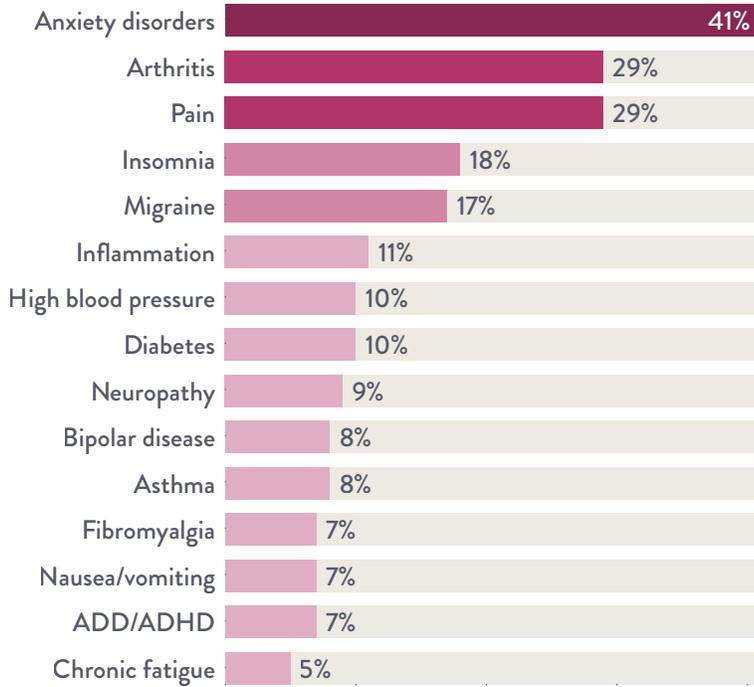
Note: Among current consumers.



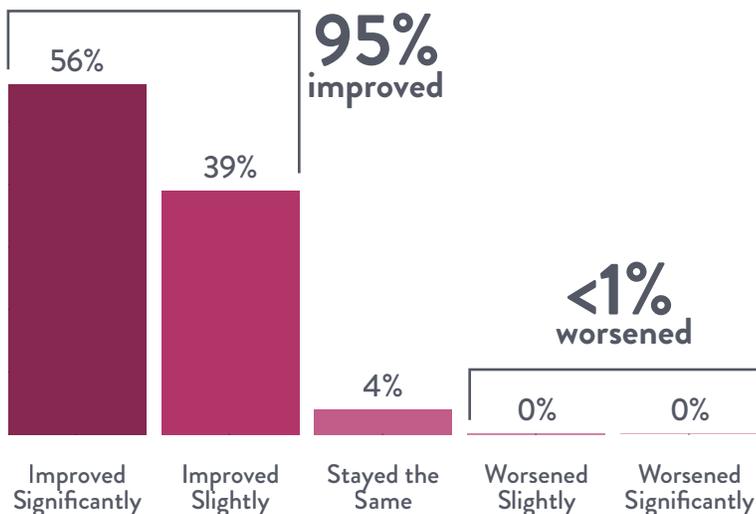
As of 2021, 42% of respondents identified as medical cannabis consumers, an increase of 7% since 2018.



Medical Conditions Among Medical Cannabis Consumers



"What has been the impact of cannabis on your medical condition?"



Above charts: Among current, self-identified medical consumers.

To gain greater insights into which types of patients use medical cannabis, respondents were asked which conditions they were actively treating. Medical cannabis consumers were likeliest to report having anxiety disorders (41%), arthritis (29%), or pain (29%).

Each of the three leading conditions are experienced by tens of millions of Americans (e.g., anxiety: 20+ million; arthritis: 51+ million; and pain: 140+ million¹). As cannabis becomes more accepted and accessible, more people experiencing those conditions will consider trying it, especially if cannabis is recommended by current medical consumers having overwhelmingly reported improvement in their conditions due to cannabis.



95% of medical consumers believe that cannabis has improved their medical conditions; 56% report significant improvement.

1. University of Washington Institute for Health Metrics and Evaluation, 2019, ghdx.healthdata.org/gbd-results-tool



Medical Cannabis Use Across Consumer Archetypes



Deborah

Holistic Healer

Deborah is a 70-year-old grandmother living in Scottsdale, AZ. She is mostly retired, but continues to teach one course each semester at the local university. She finds topicals extremely helpful with arthritis in her hands, and has recently started experimenting with tinctures to ameliorate more general body aches and pains.



Rich

Aching Dabbler

Rich is a 61-year-old former freelance writer, now retired and living near Cheyenne, WY. He has chronic pain in his shoulder that has been getting worse over the last few years. He doesn't regularly use cannabis, but occasionally smokes joints brought by his daughter when she visits. He is not sure what kind of cannabis it is, but he says it relieves his shoulder pain.



Nia

Modern Medicinal

Nia is a 34-year-old financial analyst working from home in New York City. She has an autoimmune disorder that occasionally flares up, causing generalized discomfort or pain. She uses topicals and low-dose tinctures when her symptoms are not too extreme, or when she needs to work during flare-ups. She prefers edibles when she can unplug from work and experience longer and stronger effects.



Michelle

Savvy Connoisseur

Michelle is a 53-year-old lawyer in Philadelphia who read an article a couple years ago about research into the neuroprotective qualities of cannabis. Michelle has always enjoyed using cannabis, but is newly interested in the possible long-term benefits for brain function since her mother was diagnosed with Alzheimer's a year ago.



Mike

Legacy Lifestyler

Mike is a 39-year-old seasonal firefighter in Panguitch, Utah. Mike smokes cannabis to help ease his persistently aching knees since a slab-biking accident a few years ago. He also finds cannabis useful for falling asleep, or enjoying evenings alone at home with a good book.





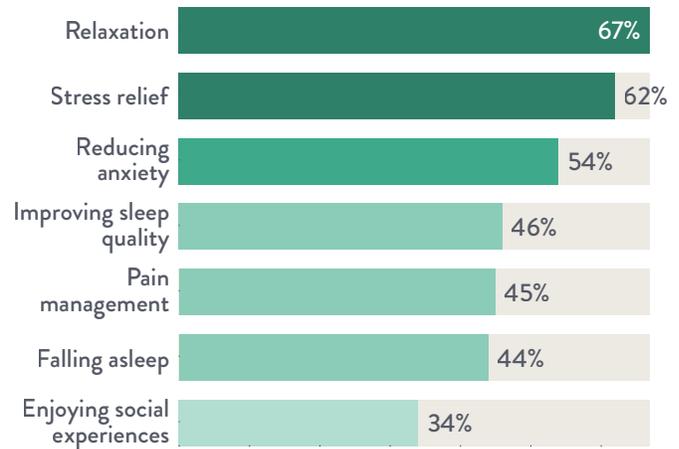
Unwinding & Mental Wellness

WHILE THE USE OF CANNABIS for the purpose of relaxing is common across all consumer demographic groups, exactly what constitutes relaxation in practice varies between individuals. The most common ways that people spend their time after using cannabis involve consuming media (e.g., watching TV/movies, listening to music, browsing the internet/scrolling social media), spending time with others (e.g., socializing, spending time with family/partner), or meeting physiological needs (e.g., sleeping or eating).

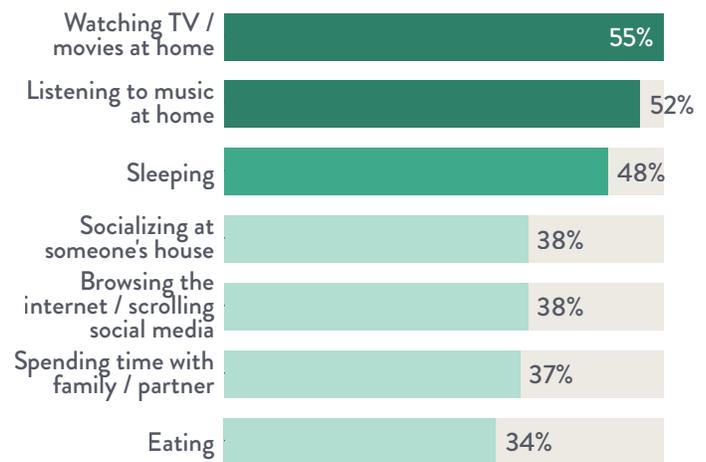


Relaxation (67%) and stress relief (62%) are the leading reasons for cannabis use among both men and women across all age groups.

Top Reasons for Cannabis Use



Top Activities While/After Consuming Cannabis



Above charts: Among current consumers.



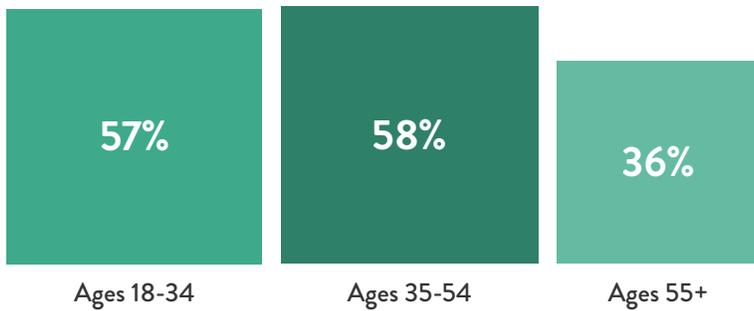
Meditate/Pray After Consuming Cannabis

By age



Have Used Cannabis to Improve Mental Health During the COVID-19 Pandemic

By age



Though a minority of consumers combine their cannabis use with a meditation, prayer, or other mindfulness practice, the pairing is significantly more common among younger consumers.

Rates of having used cannabis to improve mental health during the pandemic are significantly higher among consumers under age 55 than among those 55 or older.



52% of current consumers reported taking cannabis to improve their mental health during the pandemic.

Above charts: Among current consumers.



Cannabis for Unwinding Across Consumer Archetypes



Sarah

Contemporary Lifestyler

Sarah, 37, works at a small arts nonprofit in Portland, OR. Sarah very well knows her cannabis strains and how they affect her. She uses her favorite sativa to get into the groove of cleaning the house, a specific indica-dominant hybrid for scrolling social media in the evenings, and 15 mg of a particular edible for listening to music at home. She always has the right product for however she wants to decompress.



Jason

Legacy Lifestyler

Jason is 45 years old and lives outside Darlington, WI. He is having an extremely stressful time at work, where he manages a small garden-supply store. Jason has always enjoyed using cannabis, and recently found that it is one of the few things which reliably helps him unwind at the end of the day. He's also trying to get into a meditation practice, and cannabis seems to help him stay present for that.



Elijah

Classic Smoker

Elijah, 24, lives in St. Paul, MN, and works part-time managing databases for a local business. Elijah does not really know what he is smoking whenever he gets something from his dealer. He likes to get high and Facetime with friends, many of whom he's gotten closer to since starting such calls early in the pandemic. He also enjoys getting high with his boyfriend, and watching movies at home on the weekends.



Amanda

Social Nibbler

Amanda is 29 and works in retail in McKinney, TX. Amanda almost never uses cannabis when she is alone, mostly because she does not like smoking, and does not know either where to get or how to make edibles. However, she really enjoys consuming edibles with friends at chill gatherings on her Saturdays off from work. Spending the time with friends helps her relax and recharge.



Robert

Infrequent Partaker

Robert is 63 years old and lives in Maumee, OH. He rarely uses cannabis, and does not know where to get it. Still, every couple of years he sees an old high-school friend who always seems to have some. Robert enjoys catching up with him over a joint and laughing about things that they used to get up to together.





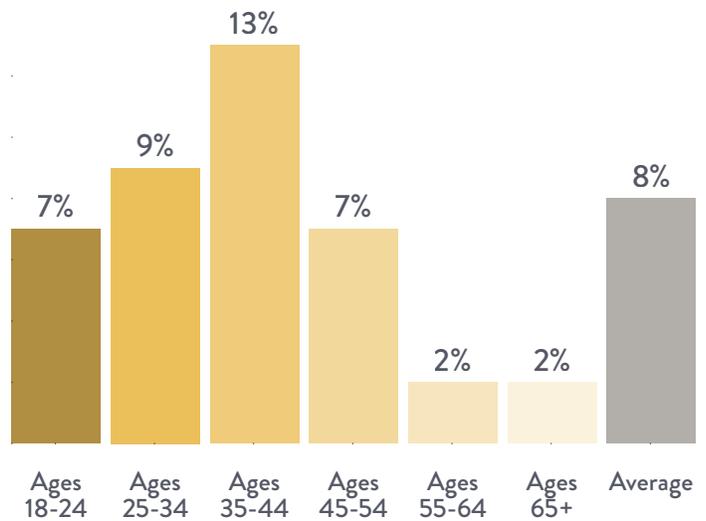
Cannabis and Fitness

THE LONGSTANDING prohibition-era stereotype of the unhealthy, sedentary stoner is being challenged as more consumers become open about how they use cannabis. An April 2021 study² found that current cannabis consumers engaged in more physical activity than did people who were not consumers.

The combination of cannabis and exercise is distinctly higher among consumers under age 45 than among consumers 45 or older. The share of consumers indicating exercise/fitness as a reason for cannabis use is highest among consumers ages 35-44 (13%), and 16% of all current consumers under 45 incorporate cannabis in their workouts.

Use Cannabis to Improve Exercise/Fitness Training

By age



8% of consumers list improving exercise/fitness training as a reason for using cannabis, and an even larger share of consumers (13%) regularly use cannabis before exercising.

2. Ong et al., 2021. "Cannabis use, sedentary behavior, and physical activity in a nationally representative sample of US adults", *Harm Reduction J*, 18(48). DOI: doi.org/10.1186/s12954-021-00496-2



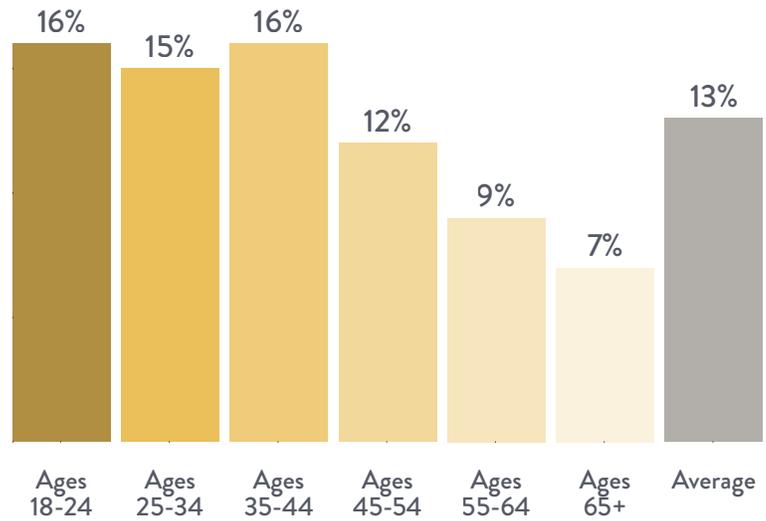
The specific goals and activities consumers engage in vary among fitness-oriented consumers of different ages and genders:

Top fitness-specific goals for combining exercise and cannabis use (by age)		
AGES 18-34	AGES 35-54	AGES 55+
Enjoyment	Relaxation	Reduced soreness
Motivation	Motivation	Relaxation

Top fitness activities after consuming cannabis (by gender)			
FEMALE		MALE	
1.	Yoga/Pilates	1.	Weightlifting
2.	Hiking	2.	Running
3.	Running	3.	Hiking
4.	Dancing	4.	Cycling
5.	Weightlifting	5.	Team sports

Exercise While/After Consuming Cannabis

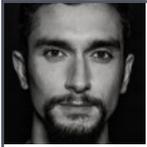
By age



Above charts: Among current consumers.



Cannabis and Fitness Across Consumer Archetypes



Chris

Modern Medicinal

Chris is 42 years old and lives in Miami. He likes any exercise that gets his heart pumping—especially cycling or running. Most edibles seem to be too low-dose to affect him, so he prefers a high-dose tincture. Chris feels like since he has been using cannabis while exercising, he is better able to recover from long rides or runs more quickly. He also sometimes uses topicals the day after tough workouts to reduce muscle soreness.



Natalia

Savvy Connoisseur

Natalia is 44 years old and lives in San Diego. She once took a “smoke-and-stretch” high yoga class a few years ago, figuring that she greatly enjoyed both cannabis and yoga. Discovering the combination of exercise and cannabis felt like an epiphany. Now, Natalia finds that if she is struggling to motivate herself to start her Pilates workout or get out on the hiking trail, cannabis helps her get moving. She also consumes after those Pilates workouts if she feels particularly sore.



Jessica

Legacy Lifestyler

Jessica is 31 and lives in Keene, NH. She is a runner—occasionally she participates in marathons and half marathons, but she primarily enjoys distance running in the beautiful state parks. Jessica had childhood asthma, which occasionally flares up. Smoking cannabis right before going out on a run reliably staves off her asthma, thus affording her with much greater endurance.



Matt

Contemporary Lifestyler

Matt is 28 years old and lives in Boulder, CO. He visits the gym nearly daily, where he completes a 30-, 40-, or 60- minute circuit workout, depending on the day. Most days involve at least some time on the weight machines, followed by at least 10 minutes on the treadmill. He finds that cannabis helps him maintain focus and interest in his workout, and keeps his body more relaxed, reducing risk of injury.



Dave

Classic Smoker

Dave is a 58-year-old living in Athens, GA. Dave has always been very active, and has not slowed down much as he has gotten older. He smokes cannabis to enhance his enjoyment of hiking in nature, his preferred way to recharge and relax on the weekends. Dave also plays pickup basketball once a month with his dealer.



Alexis

Engaged Explorer

Alexis is a 22-year-old living in Rockville, MD. She is extremely active and enjoys running, cycling, hiking, yoga, or snowboarding in the winter. Though she rarely has a problem finding motivation to be active, cannabis does give her an extra boost. Most importantly though, cannabis just adds to her enjoyment of being physically active.





Cannabis as a Replacement for Alcohol

RECENT YEARS have seen a proliferation of infused cannabis beverage brands and products, some of which are explicitly positioning their products as healthier alternatives to alcohol. The premise is one that consumers widely accept, as **more than 4 in 5 (81%) current cannabis consumers believe that cannabis is safer than alcohol.**

While 16% of cannabis consumers specifically named replacing their alcohol drinking as a reason for using cannabis, the number of consumers who have replaced at least some of their drinking with cannabis use (in any form) is nearly 3x higher yet:



Among cannabis consumers who also drink alcohol, nearly half (47%) have replaced at least some of their alcohol use with cannabis.

Replacing alcohol use with cannabis is higher among men than women, and is much higher among people under age 55 than among those 55 and older.

For most of the 47% of consumers who have replaced some of their drinking with cannabis use, the substitution was probably gradual, and arose as cannabis became more available and socially acceptable, in a broader range of situations where alcohol had previously been the only acceptable option.

As legal access to infused beverages expands, alcohol replacement may become more successful for consumers who find smoking, vaping, or eating cannabis as unsuitable replacements for the act of drinking a beverage.

"I have replaced some of my drinking with cannabis use"

By age and gender



Above chart: Among current cannabis consumers who also consume alcohol.



Alcohol Replacement Across Consumer Archetypes



Sean
Savvy Connoisseur

Sean is 32 years old and lives in Chicago. He does a lot of socializing with friends, and finds that he does not tolerate alcohol as well as he did a few years ago. Since discovering cannabis-infused beverages, Sean has started bringing a few infused drinks to get-togethers instead of a six-pack of beer. He likes not feeling hungover the next day, and enjoys introducing his friends to these new beverages.



Lisa
Classic Smoker

Lisa is 50 years old and lives in Enid, OK. She likes to drink beer, and slightly increased her drinking during the pandemic. She believes that cannabis is a healthier option, so she is trying to replace alcohol with cannabis as much as possible. She finds that her evening beer is hard to replace with smoking a bowl, since it feels very different from her longstanding ritual. So, while Lisa has replaced some of her beer drinking, she would like to cut back even more.



Mary
Legacy Lifestyler

Mary is a 56-year-old living in Tuscaloosa, AL. Mary feels like she barely drinks anymore. These days she might drink a glass of wine when having dinner with friends about once a month. Cannabis is less likely to make her feel unwell, so the switch to using cannabis instead of alcohol (when in private) was easy. She is not sure how her friends would feel if she admitted that she was smoking cannabis a couple times a week.



Jacob
Engaged Explorer

Jacob is 25 and lives in Lansing, MI. He still drinks regularly — he likes hard seltzers — but has cut back since his undergrad years. Now he typically has one or two drinks a night instead of five or six. Since cannabis was legalized, he has his choice of cannabis products, and has discovered a few edibles and vape brands that he really likes. He is happy to have found options other than alcohol for modifying his buzz.



Jim
Contemporary Lifestyler

Jim is 46 and lives in Montpelier, VT. Jim regularly drinks both beer and whiskey. His doctor seems a little concerned about his drinking, and Jim grudgingly concedes that she might have a point. He recognizes that alcohol — especially the hard alcohol — is probably not good for him to drink so often. So, he has been trying to replace a few whiskeys a week with cannabis, which he already uses regularly.



Key Takeaways



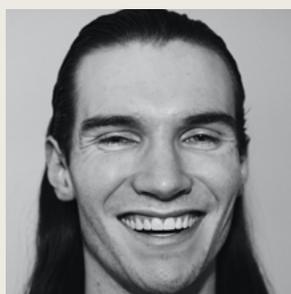
Cannabis is increasingly incorporated into consumers' health and wellness practices.

Consumers have described cannabis as a tool for mindfulness, relaxation, improved sleep, social connection, and active engagement through various physical activities. As such, cannabis is understood as part of personal wellness practices that extend beyond a more rigid interpretation of medical consumption, and which include a holistic approach to health, psychological well-being, and self-care. For some consumers, it represents a new, expanded incorporation of cannabis as part of their lifestyles; for others, using cannabis to complement an overall wellness regimen is a primary motivation for use. Regardless of how those consumers arrived at their modes of use, the understanding of cannabis as a tool for health and wellness has gained a significant amount of cultural momentum. For operators in the industry who seek to capitalize on the trend, it will be imperative to articulate how cannabis products can contribute to consumers' wellness practices, and to develop products specifically to meet those needs.



Growing social acceptance of cannabis and increasing availability and diversity in the infused beverage product category will continue to drive replacement of alcohol among some cannabis consumers.

As cannabis becomes more available and socially acceptable in a broader range of situations where alcohol had previously been the only acceptable option, cannabis use will supplant alcohol consumption among some users. As legal access to infused beverages expands, alcohol replacement may become more successful for consumers who find smoking, vaping, or eating cannabis to be unsuitable replacements for the act of drinking a beverage.





The market for medical cannabis continues to grow.

While smaller than the adult-use market, the medical cannabis market is strong, and expected to continue to grow in the medium term. Generating \$9 billion in 2020, the medical cannabis market is projected by New Frontier Data to grow to over \$15 billion by 2025. The growth will be further assisted by creation of new medical markets in Mississippi and South Dakota following successful ballot initiatives in the 2020 elections, and with the likely addition of new, larger states (e.g., Texas and Georgia) in the coming years.



The well-established science on the negative health effects of alcohol is leading more consumers to explore cannabis as a healthier, safer alternative.

“Alcohol use is a leading risk factor for disease burden worldwide, accounting for nearly 10% of global deaths among populations aged 15–49 years, and poses dire ramifications for future population health... The safest level of drinking is none... Alcohol use contributes to health loss from many causes and exacts its toll across the lifespan.”³ Younger generations of cannabis consumers (e.g., Gen X, Millennials, and Gen Z) are especially more likely to view cannabis as being safer than alcohol.

3. GBD 2016 Alcohol Collaborators, *The Lancet*: “Alcohol use and burden for 195 countries and territories, 1990–2016”, 2018; [doi.org/10.1016/S0140-6736\(18\)31310-2](https://doi.org/10.1016/S0140-6736(18)31310-2)



The share of cannabis consumers who identify as medical consumers is increasing.

As of 2021, 42% of consumers identify as medical cannabis consumers, an increase of 7% since 2018. There has been an increasing cultural awareness about the health benefits and medical applications for cannabis, and consumers have responded by incorporating cannabis products into their overall health practices. Additionally, as awareness grows, associated stigma attached to cannabis use rapidly diminishes, thus opening the market to consumers who may previously have been resistant to using cannabis products. Further, as more states legalize cannabis for both adult and medical use, products become more widely available to consumers. The industry is well positioned to capitalize on those dynamics by engaging in robust consumer education initiatives, and explicitly speaking to the health benefits of cannabis as well as the myriad forms available for consumption.



Continued product diversification will present consumers with a rich new array of use cases with which they can integrate cannabis into wellness practices.

While “unwinding” activities like watching TV, listening to music, sleeping, or socializing are the most common activities among consumers after using cannabis, there is an extremely wide range of different use cases which vary between individuals. Each niche of use cases presents opportunities for specific effect-based or situationally driven products and brands.





Young adults' alcohol use has been decreasing and their cannabis use increasing over the last 30 years, according to *Monitoring the Future*, one of the longest running longitudinal studies of young U.S. adults' drug use.

In 2020, alcohol use among college adults fell to a record low, while cannabis use reached an all time high. This seismic shift is of growing concern for the alcohol industry, not only because of the decline in current spending among young adults, but more consequentially, this trend portends a significant decline in total lifetime spending as these young adults mature. If young adults fail to develop their palates for cider, beers, and hard seltzers in their early 20s, they are less likely to graduate to appreciating wines, and eventually may fail to acquire a taste for premium beverages, such as fine whiskeys, rums, and other hard liquors, later in life. The impact that the normalization of cannabis use will have on young adults' Total Lifetime Value as alcohol consumers is one of the reasons that the world's largest alcohol companies are pursuing M&A opportunities within the cannabis industry as a way to offset the anticipated shift in spending.



Normalization and social acceptance of cannabis will also give consumers greater flexibility to use cannabis in ways aligned with their wellness objectives.

From yoga and meditation classes which permit cannabis use, to cannabis social lounges as alternatives to alcohol-only bars and clubs, the growing acceptability of cannabis use outside the home and in regulated public/social spaces will give consumers an increasingly expansive array of options by which they can use cannabis to improve their physical, mental, and social well-being.





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