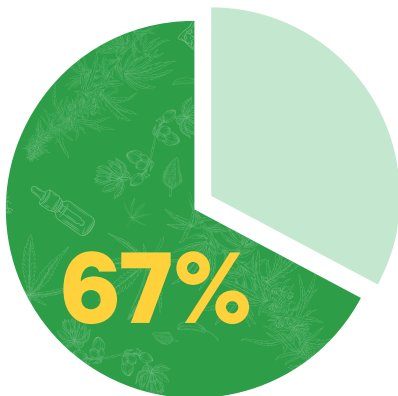




About **2 in 3** Ontario cannabis consumers are now making at least some of their purchases from the **legal market**.

Have
purchased
cannabis
products from
a legal source



Three-quarters of consumers (**75%**) are likely to purchase from an Authorized Retailer's physical store.



Authorized Retailers are the biggest **channel** for both **purchases and preference**.

Likelihood of purchasing in the next 6 months from...



What drives consumers to purchase legal cannabis?

- 1 Safety & Accountability** – Understanding what they will get and knowing products are safe
- 2 Product Content & Preferences** – Getting consistent quality and having a consistent experience product to product
- 3 Specific Products & Features** – Providing the right cultivars, potency and brands



When it comes to shopping legally, consumers look for specific aspects in the shopping experience.



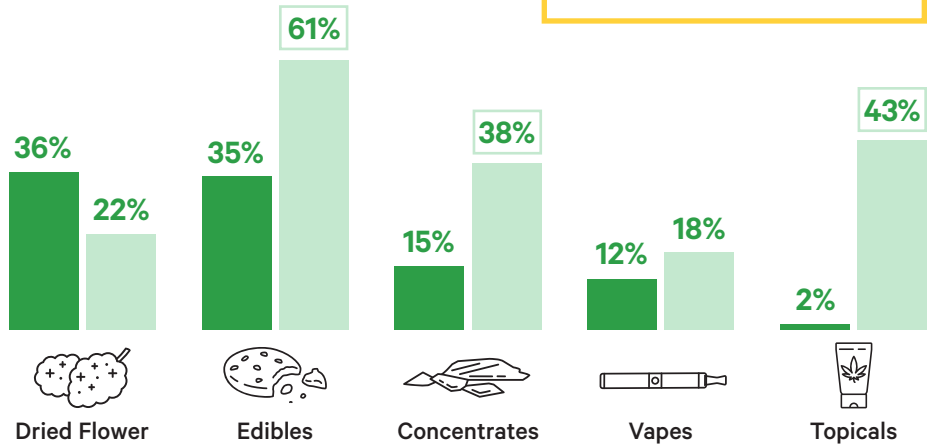
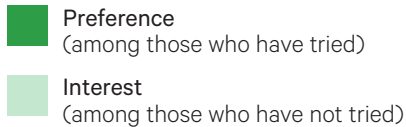
Those who consume for medicinal reasons (**49%**) are more likely to buy from recreational stores.



Flower continues to be the most preferred format and makes up the largest proportion of sales and consumption occasions.

High interest among those who have yet to try **2.0 products** makes them **perfect basket builders**.

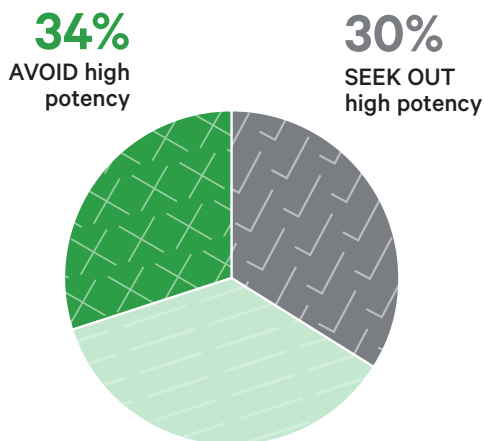
TIP



The preference for edibles is growing.



Not all consumers are looking for the highest THC products.



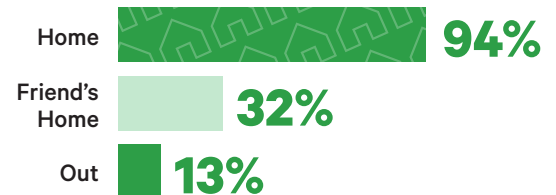
Be sure to understand shoppers' needs and occasions before suggesting products.

TIP



At home and alone are the biggest occasions for consumption, but group occasions are beginning to rebound.

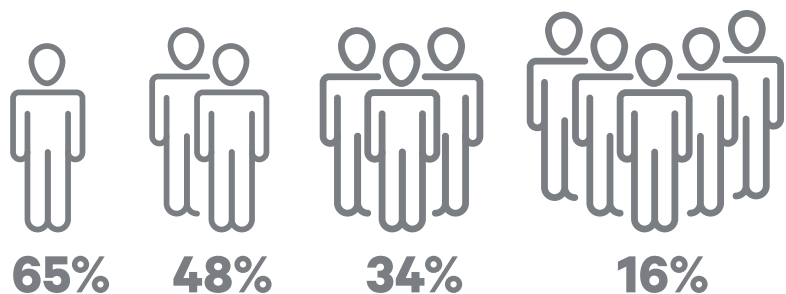
Cannabis Consumption Location



TIP

Group occasions are ideal for multi-pack and small format pre-roll recommendations.

Most consumers consume cannabis alone, while the fewest do so in a large group.



Note: Because cannabis consumers could select more than one option, the sum of the categories does not add up to 100%



Shoppers' preferences and interests vary, depending on consumption habits

Once you understand who your consumer is, be sure to have these products on hand for them...



INFREQUENT CONSUMER



WEEKEND / SOCIAL CONSUMER



DAILY CONSUMER

THEIR PREFERRED PRODUCTS:

Soft Chews	30%
Dried Flower	14%
Pre-Rolls	10%

Dried Flower	32%
Soft Chews	26%
Pre-Rolls	11%

Dried Flower	25%
Soft Chews	19%
Pre-Rolls	9%

PRODUCTS THAT SPARK THEIR INTEREST:

Beverages	30%
Creams and Lotions	30%
Hard Edibles	29%
Baked Goods	26%

Beverages	27%
Hard Edibles	25%
Pantry Items	22%
Creams and Lotions	18%

Creams and Lotions	25%
Pantry Items	22%
Skincare Products	22%
Bath Bombs	19%