

CANADIAN RECREATIONAL CANNABIS USERS HAVE LOW AWARENESS OF RECREATIONAL CANNABIS BRANDS

Almost 3 years after federal legalization, recreational cannabis consumers have low brand awareness across even the top-selling recreational cannabis brands. This suggests that brands have not made meaningful connections with consumers and that their position as market share leaders may be tenuous.

Insight Alert by -



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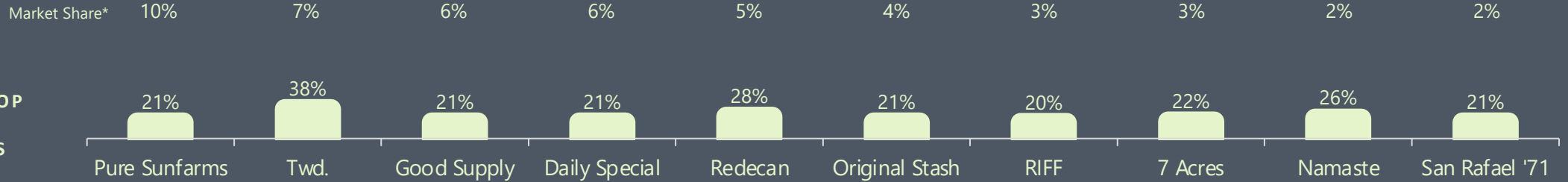
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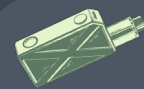
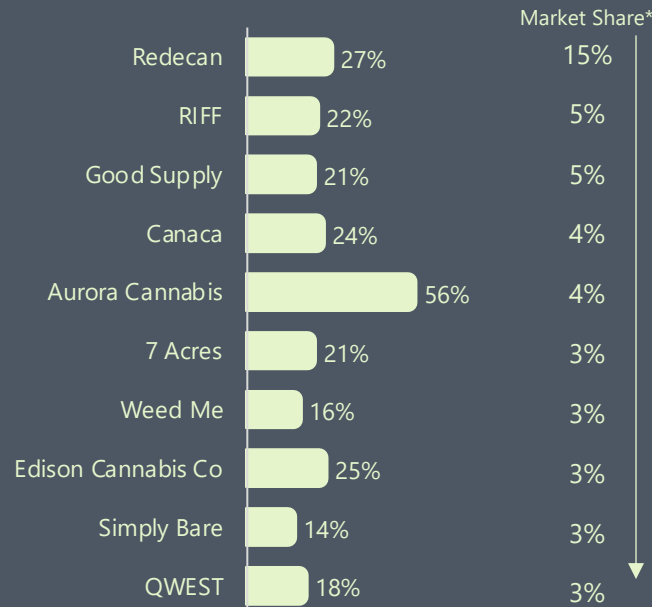
HEADSET



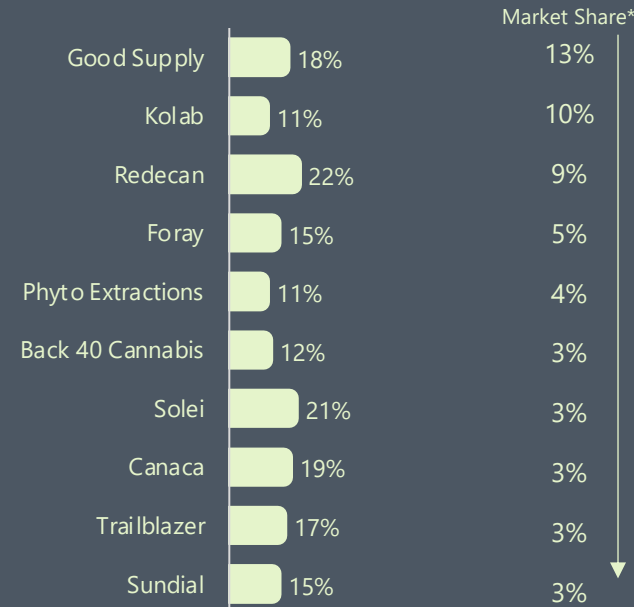
AWARENESS OF TOP 10 CANNABIS FLOWER BRANDS



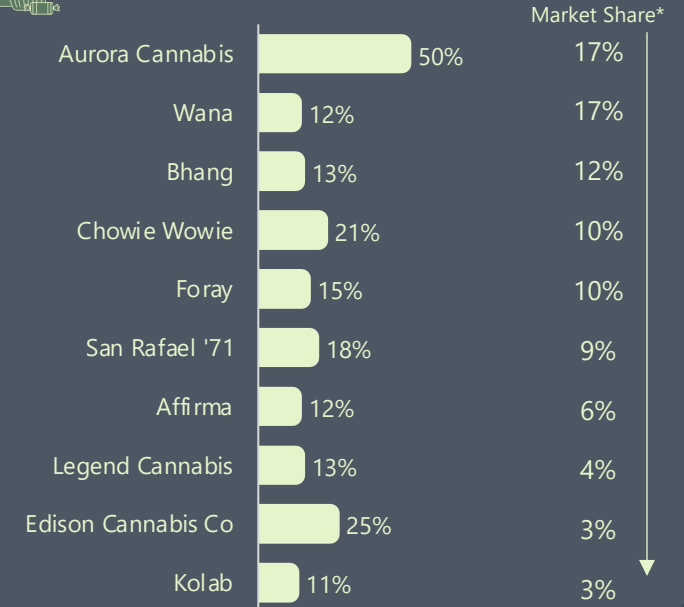
AWARENESS OF TOP 10 CANNABIS PRE-ROLL BRANDS



AWARENESS OF TOP 10 CANNABIS VAPOR PEN BRANDS



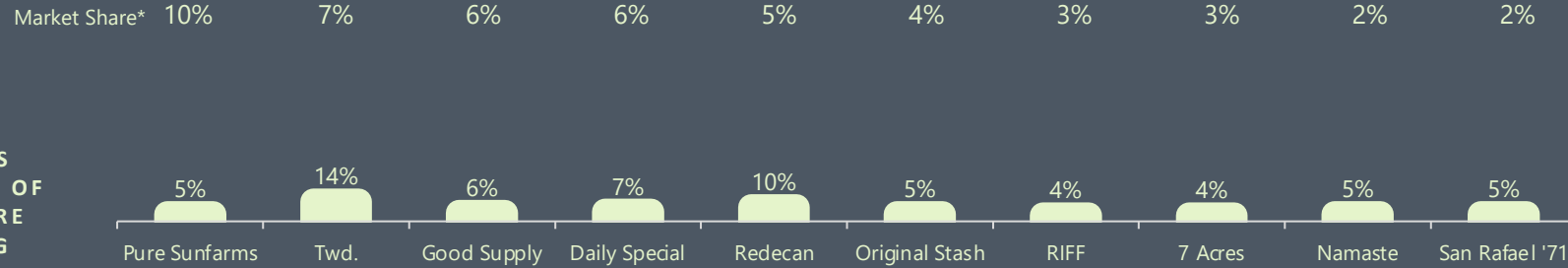
AWARENESS OF TOP 10 CANNABIS EDIBLE BRANDS



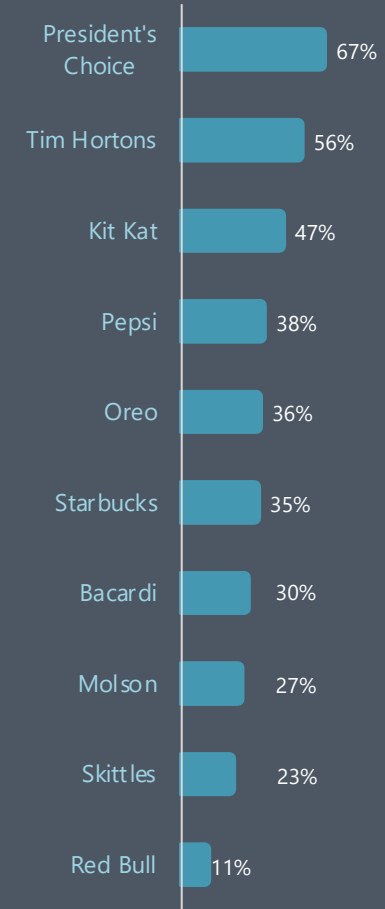
IN ADDITION TO LOW AWARENESS, CONVERTING AWARENESS TO PURCHASE HAS ALSO BEEN A CHALLENGE FOR RECREATIONAL CANNABIS BRANDS



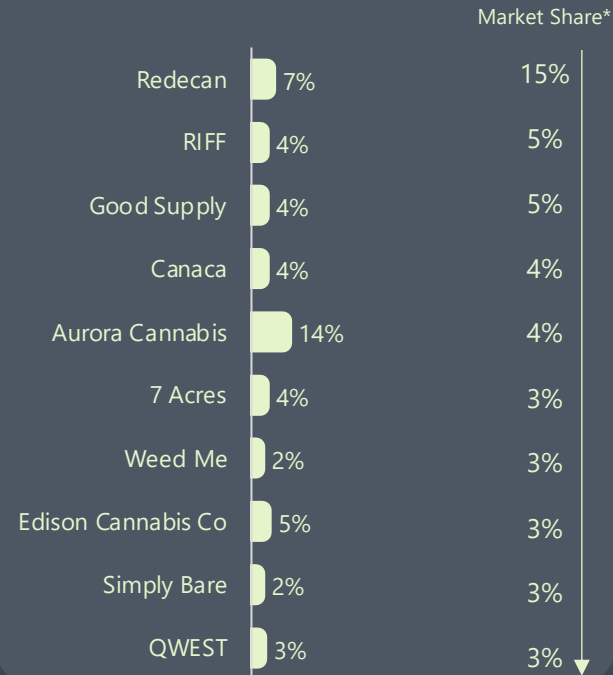
TOP 10 CANNABIS FLOWER BRANDS: % OF CONSUMERS AWARE AND PURCHASING



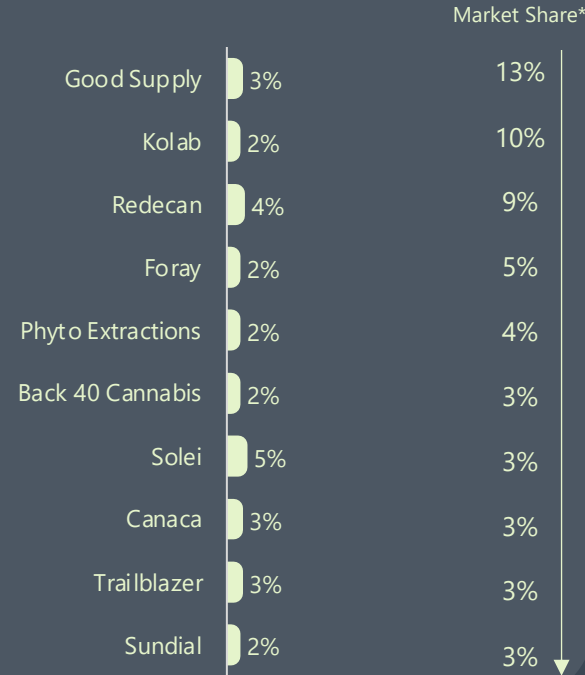
TOP 10 NON CANNABIS BRANDS - AWARE AND CURRENTLY PURCHASING For reference...



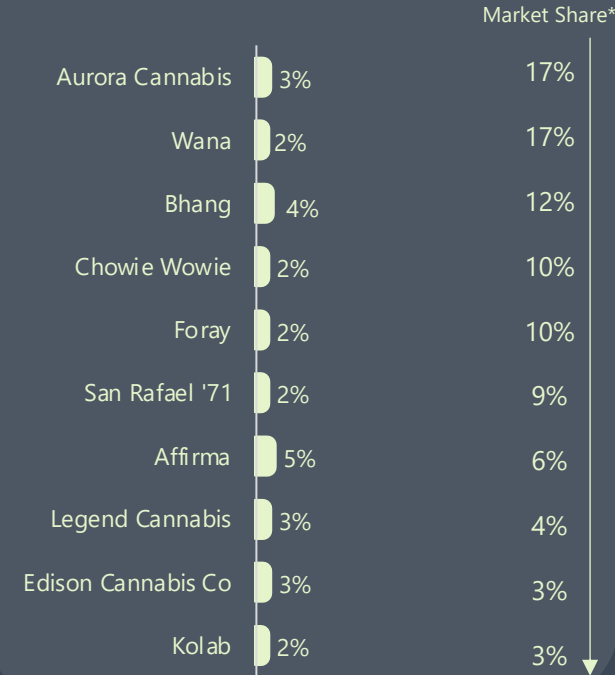
TOP 10 CANNABIS PRE-ROLL BRANDS: % OF CONSUMERS AWARE AND PURCHASING



TOP 10 CANNABIS VAPOR PEN BRANDS: % OF CONSUMERS AWARE AND PURCHASING



TOP 10 CANNABIS EDIBLE BRANDS: % OF CONSUMERS AWARE AND PURCHASING



*Market Share data derived from Headset, Total \$ Sales by Brand and Format (from April 2020 to March 2021). Provinces included: British Columbia, Alberta, Saskatchewan and Ontario (private non-OCS). Source: MARU/BUE Omnibus of 1000 Canadian respondents (who use cannabis for recreational purposes) in BC, Alberta, Saskatchewan and Ontario, June, 2021.

For additional insights from this study or to find out about our overnight solutions, please email bernie.malinoff@element-54.com or peter.mandarino@element-54.com