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# **Budding Behaviors:** **Insights Into the Modern** **Cannabis Consumer**





# About this report

Numerator's latest cannabis consumption study looks at the habits of nearly 6,000 present and past self-reported THC & CBD users. It is not intended to size the THC or CBD market, but rather to identify & understand users and to explore the broader impact of cannabis use on consumer behavior. The study combines insights from our broad cannabis usage survey with the verified purchase behavior of these same individuals.

*\*Insights are limited to individuals ages 21+ who reported living in a state where marijuana is legal.*

# Cannabis user profiles vary significantly based on substance type.

While individuals using THC skew much younger and use cannabis on a more regular basis, those using CBD tend to be older and less frequent users. Use cases and frequency also impact overall cannabis spending, with THC users spending significantly more.



## THC USERS

### Consumer Profile

- **Age:** Gen Z & Millennial
- **Income:** Low/Middle (Under \$60k)
- **Health Concerns:** Anxiety & Stress

### Cannabis Habits

- **Usage Frequency:** Daily or Weekly
- **Monthly Spending:** \$26-\$100
- **Usage Reasons:** Stress Relief



## CBD USERS

### Consumer Profile

- **Age:** Boomers+
- **Income:** Middle/High (Over \$80k)
- **Health Concerns:** Muscle & Joint Pain, Arthritis

### Cannabis Habits

- **Usage Frequency:** Less than weekly
- **Monthly Spending:** Under \$25
- **Usage Reasons:** Pain Management

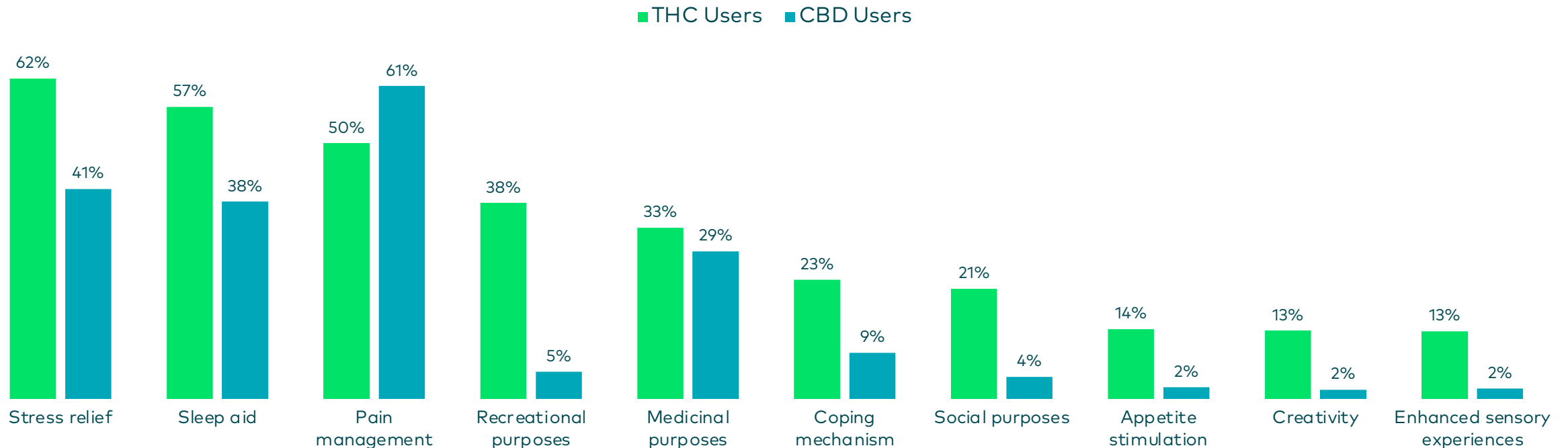
*Note: "CBD Users" in this study exclude anyone who also uses THC. "THC Users" include those who use THC exclusively and those who use both THC & CBD.*

# Distinct user profiles stem from distinct use cases for THC versus CBD.

Stress relief, sleep, and pain management are the top three reasons for cannabis use overall, but the latter is most prevalent among CBD users. THC is more broadly used for recreational, social, and creative purposes, given its intoxicating properties.

## REASONS FOR CANNABIS USE

What are your main reasons for using cannabis products?

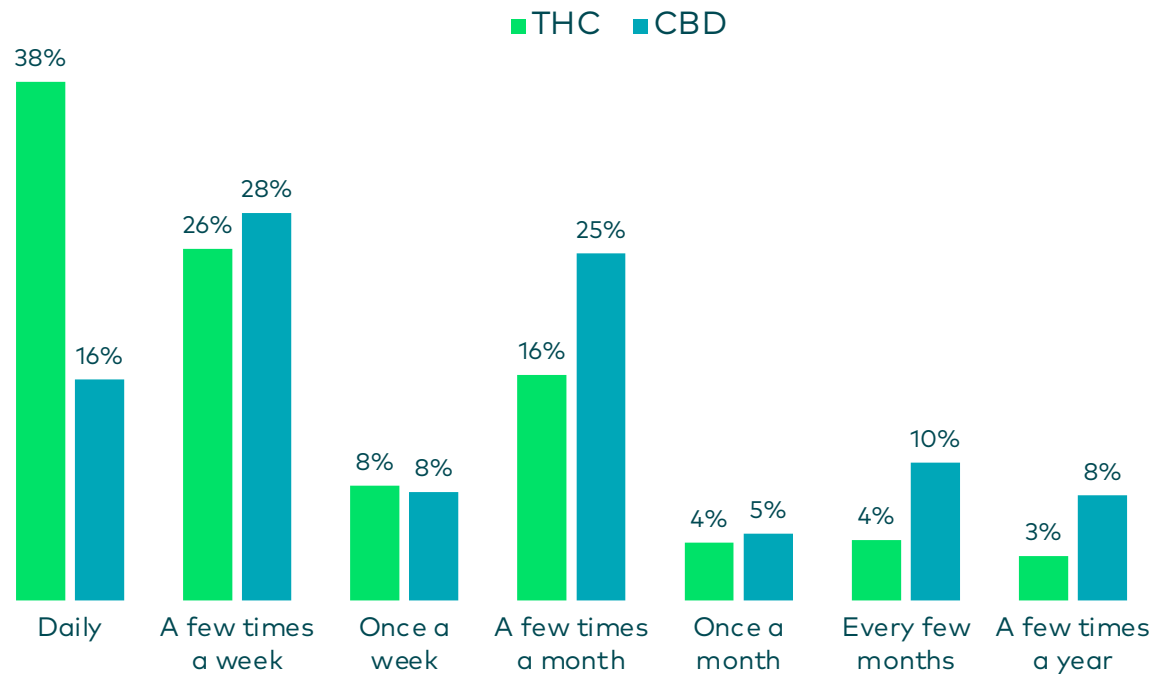


# THC is used on a more regular basis than CBD.

Over half of THC users say they use it at least a few times a week, while CBD users are more likely to use it weekly or monthly. Among individuals who use both THC and CBD, over half say they use the products together on the same occasions.

## USAGE FREQUENCY

How often do you use [THC/CBD] products?

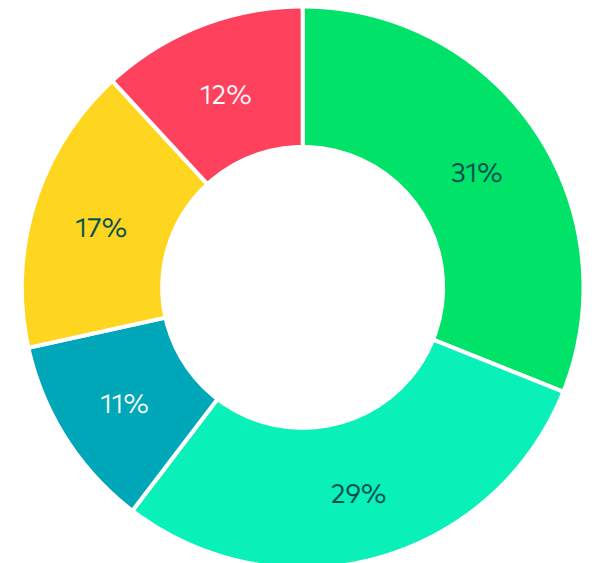


## COMBINED USE

Do you typically use THC and CBD together or separately?

*\*Among individuals who use both*

- Usually/always together
- Often together, occasionally separately
- Half together, half separately
- Occasionally together, often separately
- Usually/always separately



## Cannabis users don't expect to cut back in the coming year.

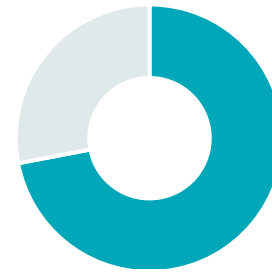
While new users are likely to enter the cannabis market as states continue to legalize marijuana, existing users expect to maintain or increase their current usage habits, contributing to further growth within the cannabis market.



**83%**

of THC users maintained or increased usage this year versus last.

(22% increased, 61% maintained)



**72%**

of CBD users maintained or increased usage this year versus last.

(14% increased, 58% maintained)



**89%**

of THC users expect to maintain or increase usage in the coming year.

(11% increase, 78% maintain)



**85%**

of CBD users expect to maintain or increase usage in the coming year.

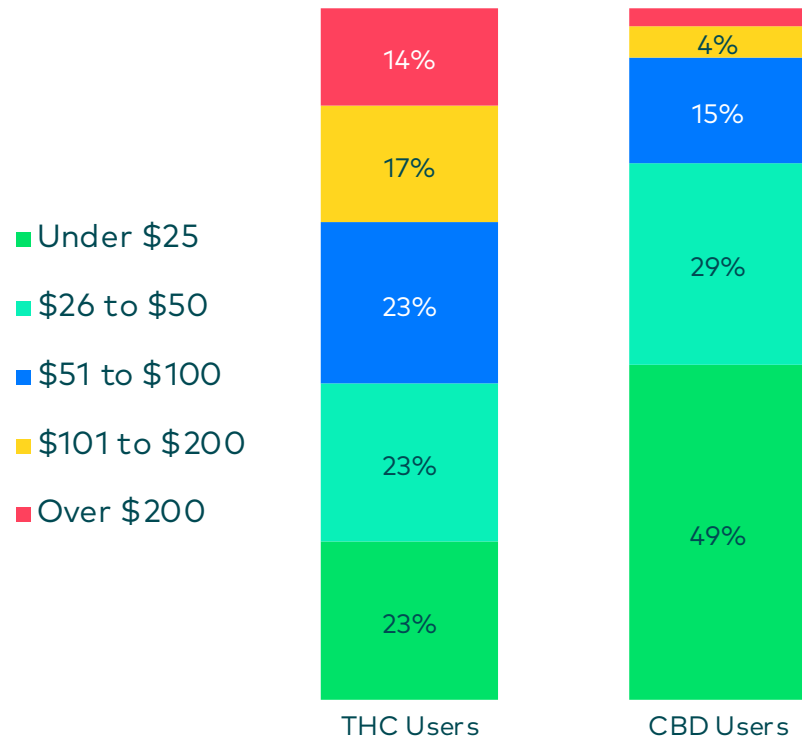
(9% increase, 76% maintain)

# Frequent use results in higher cannabis spending among THC users.

Nearly half of CBD users spend less than \$25 per month on cannabis products, while over half of THC users spend \$50 or more, and a third spend over \$100. Higher prices and purchasing at licensed dispensaries also likely play into higher spending.

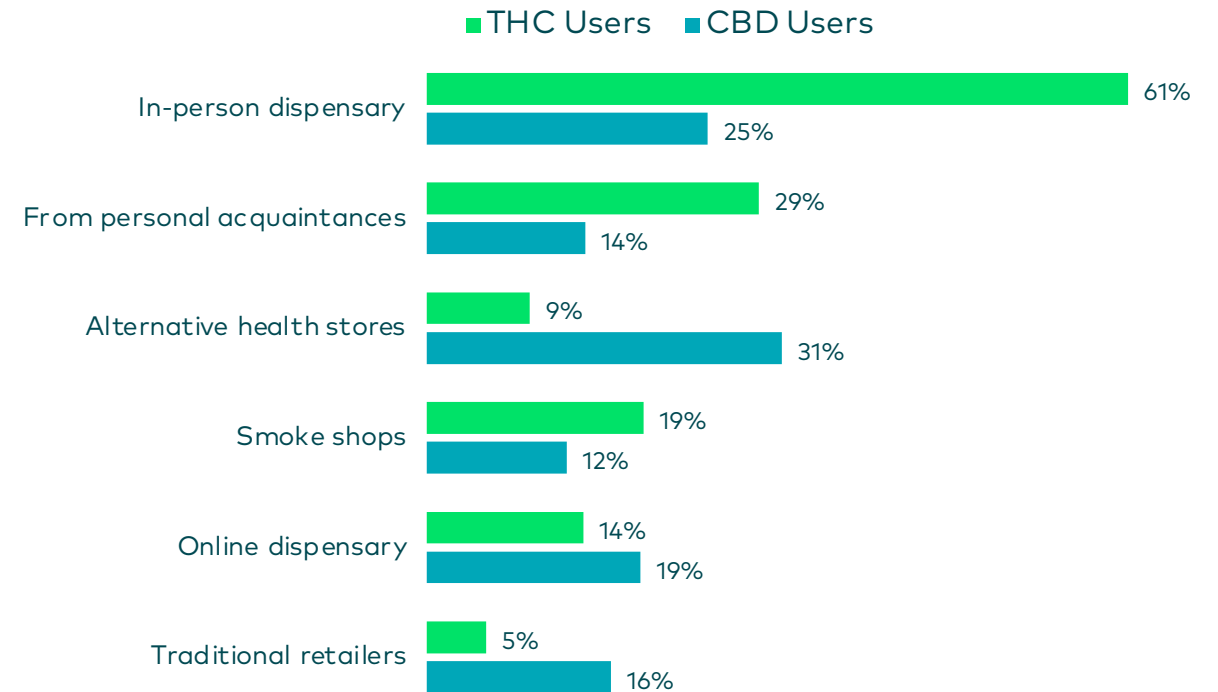
## MONTHLY CANNABIS SPEND

About how much do you spend on cannabis products monthly?



## PURCHASE LOCATIONS

Where do you typically acquire your cannabis products?

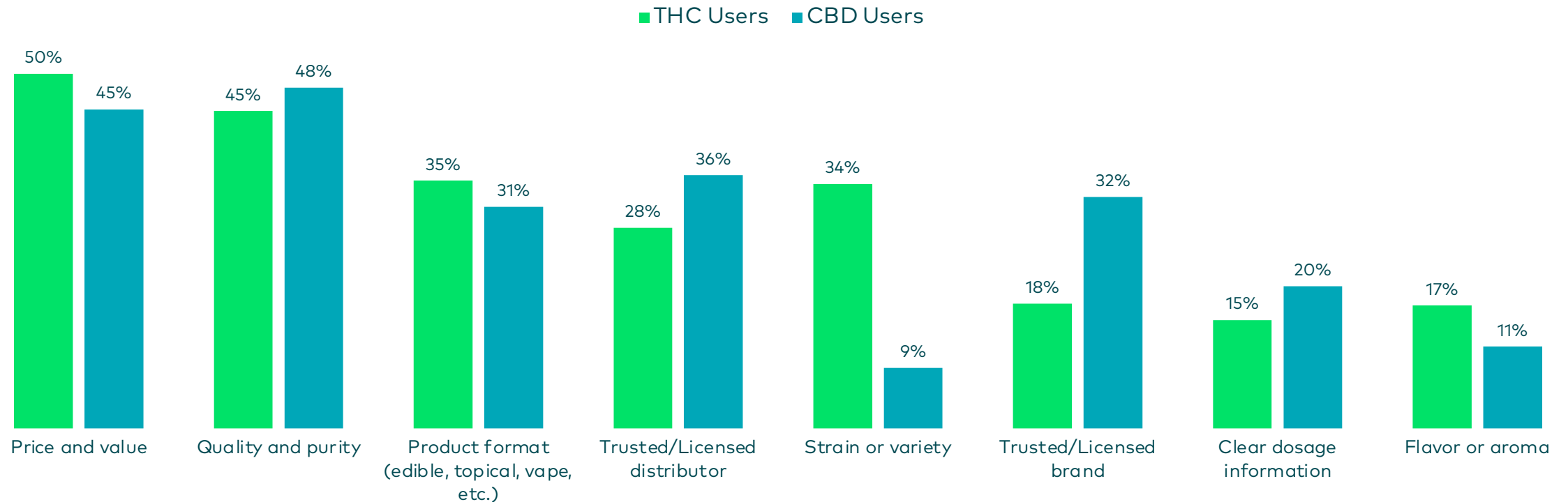


# Price and quality are the most important consideration factors for cannabis buyers.

CBD users place a slightly higher emphasis on quality & purity and are also more concerned about buying from trusted brands or vendors. For THC users, strain and product format are more influential factors.

## CANNABIS CONSIDERATIONS

Which factors are most important to you when purchasing cannabis products?



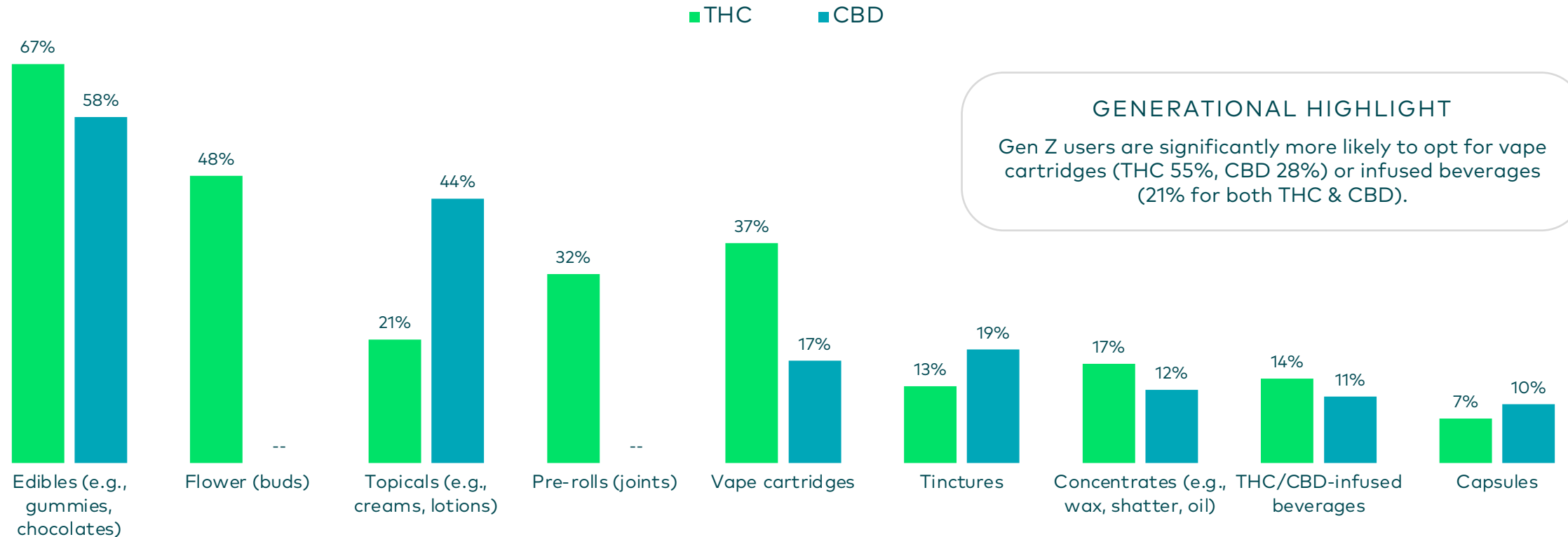


# Preferred product formats vary by substance type and consumer age.

Edibles are the most popular format overall, followed by flower for THC and topicals for CBD. Generation also plays a significant role in preference, with Gen Z and Millennials favoring vape products and infused beverages for both THC and CBD products.

## CANNABIS FORMATS

What types of [THC/CBD] products do you use?

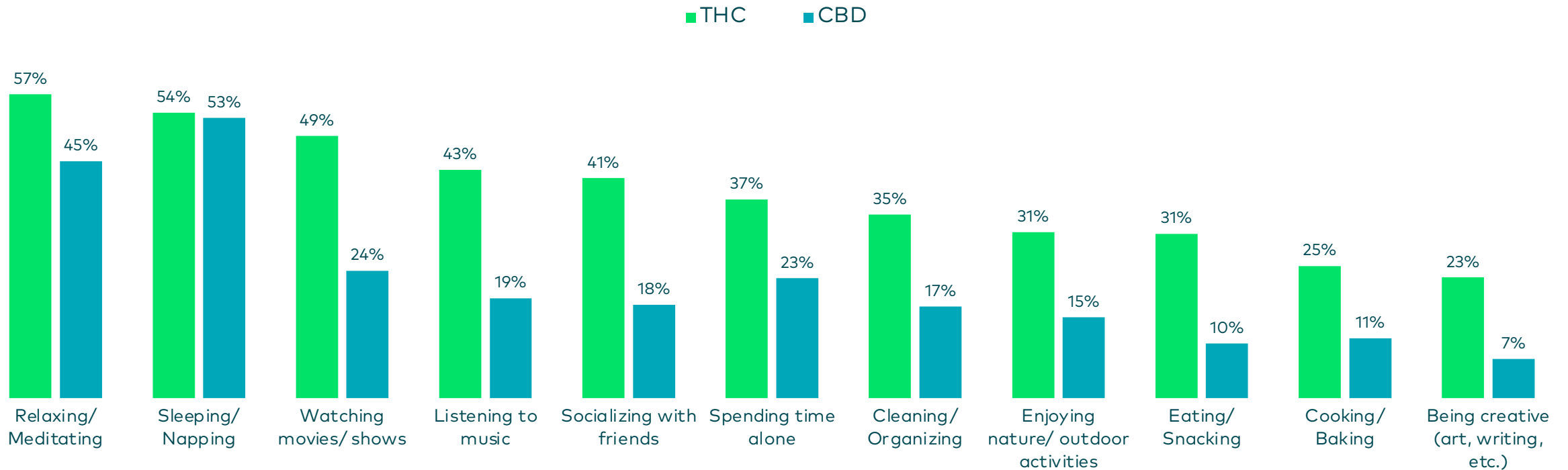


# Consumers are more likely to incorporate THC use into everyday activities.

CBD usage is much more rest-oriented than THC usage. Although restful activities like relaxing and sleeping top the list for both THC and CBD, all other activities are 2 to 3 times more popular when using THC.

## CANNABIS ACTIVITIES

What activities do you engage in when using [THC/CBD] products?

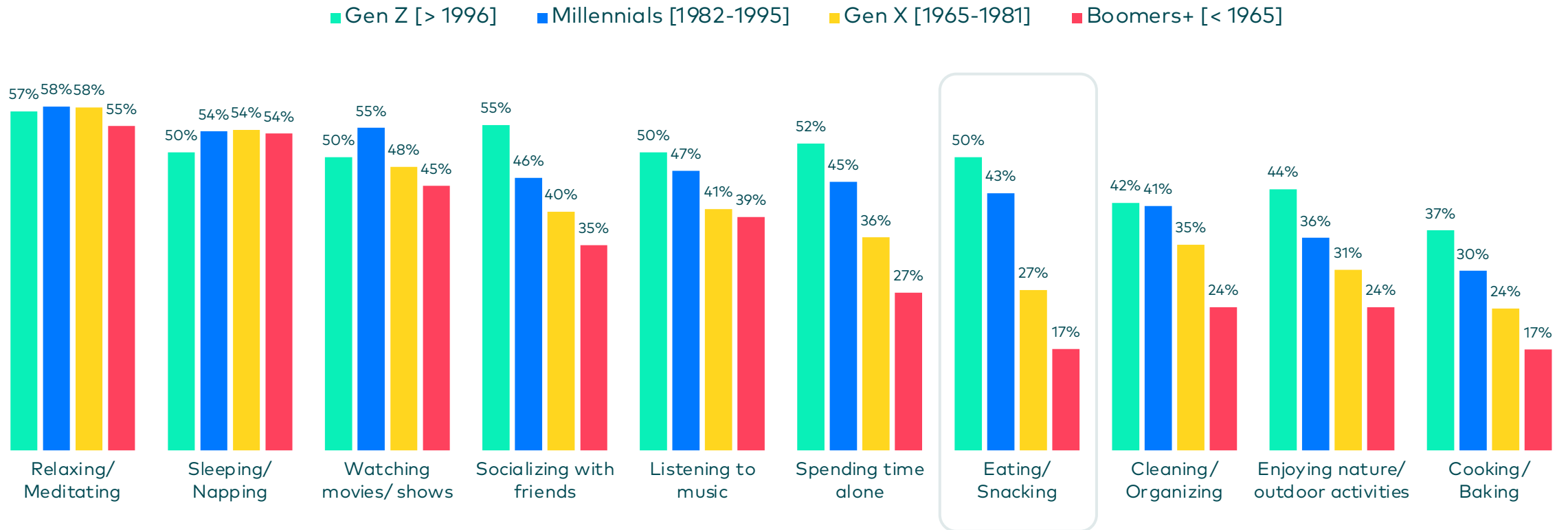


# Younger users are more activity-oriented than older individuals when using THC.

Gen Z consumers are more than twice as likely to snack or bake while using THC compared to older users, an important differentiator for food and beverage brands to note. They're also more likely to socialize, organize, or get outdoors.

## THC ACTIVITIES BY GENERATION

What activities do you engage in when using THC products?

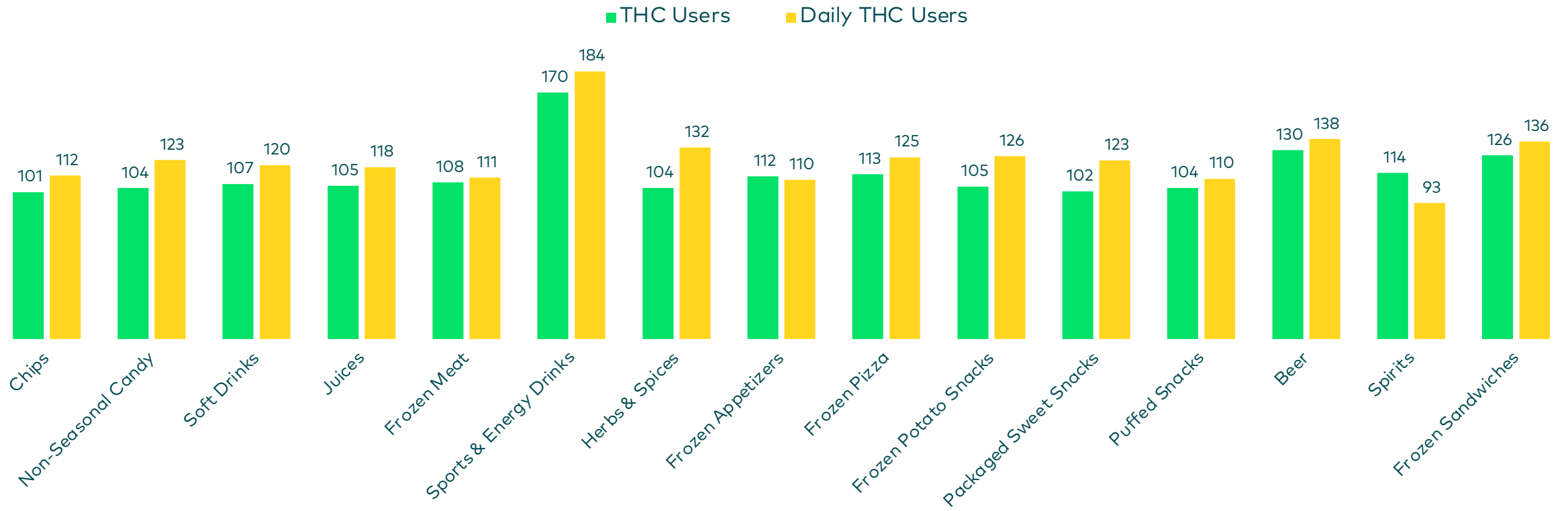


# THC users spend more of their grocery dollars on snacks and beverages.

Compared to non-users, sports & energy drinks see the largest spending boost among THC users, followed by beer and frozen sandwiches. Daily THC users have more pronounced spikes in categories like candy, herbs & spices, and packaged sweet snacks.

## TOP GROCERY CATEGORIES FOR THC USERS

% of grocery spend indexed vs. non-users



# Alcohol consumption also has clear ties to cannabis use.

THC users are more likely to purchase alcohol than non-users, but spending is inversely tied to the frequency of THC use, with daily users spending less than infrequent users. CBD users are less likely to purchase alcohol overall and spend less when they do.

ALCOHOL PURCHASE HABITS 3M Ending 3/31/2024	% of Group Buying Alcohol	Alcohol Buy Rate	Alcohol Purchase Frequency	% of Grocery Spend
<b>THC Users</b>	<b>72.6%</b>	<b>\$496.26</b>	<b>22.2</b>	<b>16.7%</b>
THC Usage: Daily	71.0%	\$453.30	22.6	15.3%
THC Usage: Weekly	74.0%	\$506.34	22.5	16.9%
THC Usage: Infrequent	73.1%	\$535.51	21.3	18.1%
<b>THC Non-Users</b>	<b>65.3%</b>	<b>\$432.08</b>	<b>17.6</b>	<b>14.3%</b>
<b>CBD Users</b>	<b>65.2%</b>	<b>\$380.80</b>	<b>15.0</b>	<b>12.8%</b>
Past Cannabis Users	68.9%	\$489.72	20.2	16.2%
Never Used Cannabis	60.8%	\$456.11	19.5	14.5%

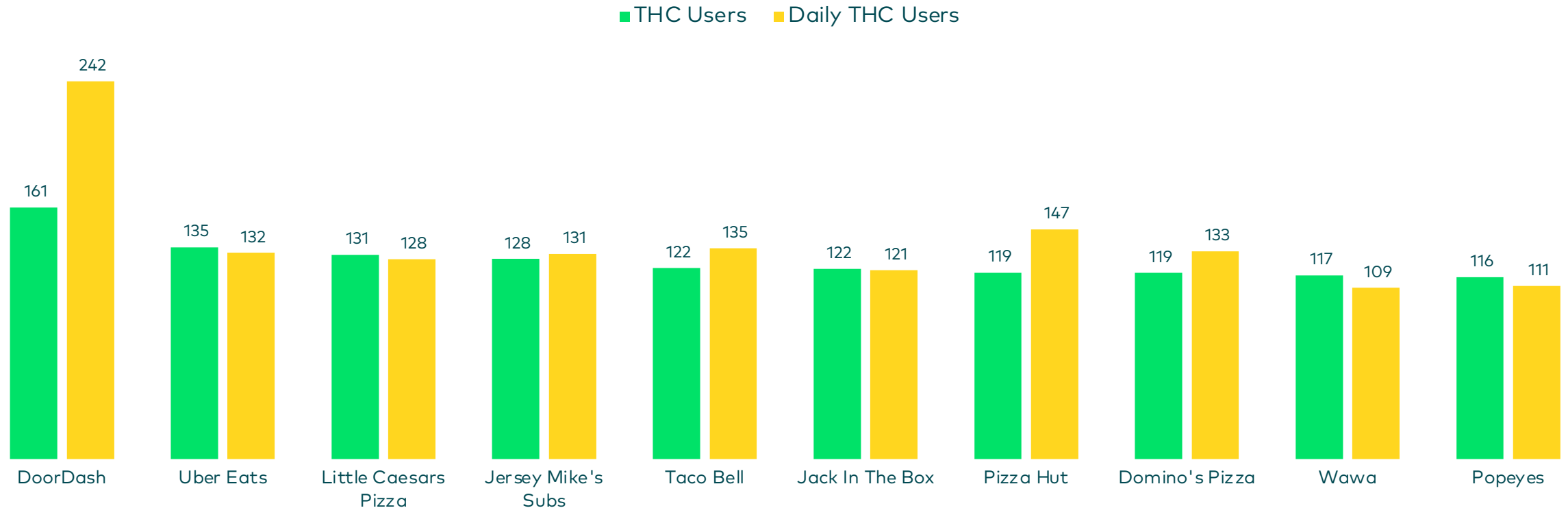
**36%**  
of THC users say they consumed somewhat or significantly more alcohol before they began using cannabis. **19%** of CBD users said the same.

# Limited-service restaurants and food delivery services win with THC users.

In addition to their unique grocery habits, THC users are more likely to have visited a limited-service restaurant or to have used a food delivery service in the past three months compared to non-users. These behaviors are even stronger among daily THC users.

## RESTAURANT & FOOD DELIVERY

% of THC users indexed vs. non-users

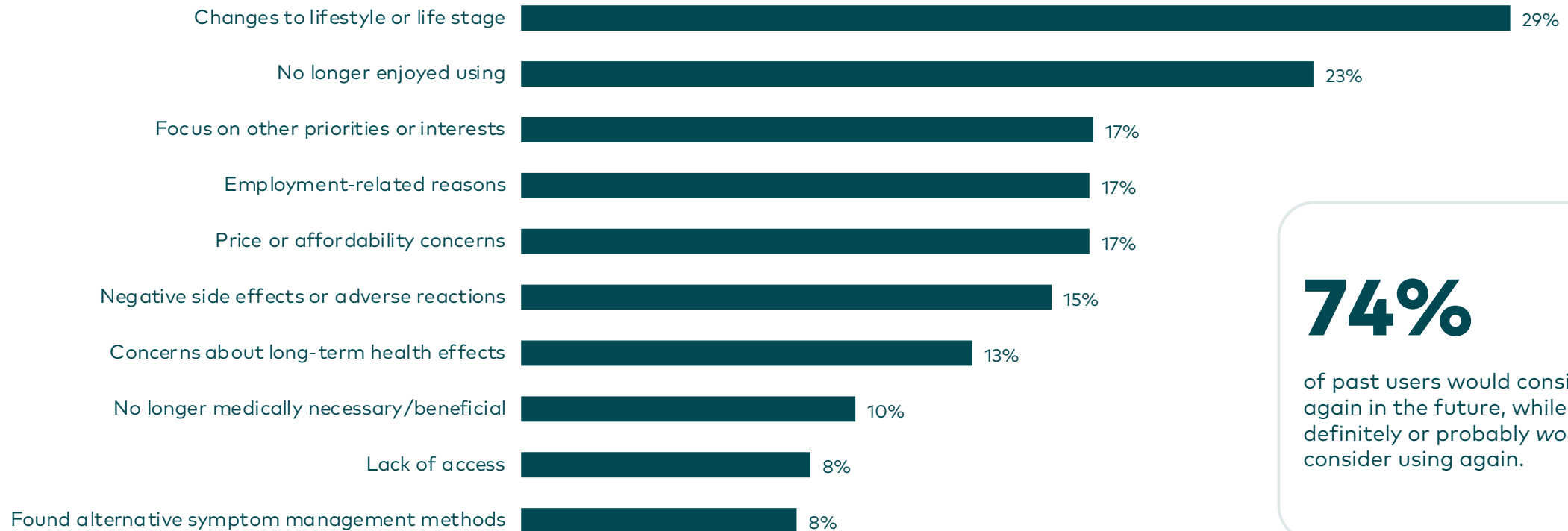


# Past users haven't closed the book on cannabis, and many are open to trying again.

Most individuals who stopped using cannabis products did so due to lifestyle changes or no longer enjoying it. With ongoing innovations in the category, these users may re-engage if an offering seems aligned with their current wants and needs.

## REASONS FOR STOPPING

Why did you stop using cannabis products?



**74%**

of past users would consider using again in the future, while **26%** definitely or probably *would not* consider using again.

## Growing up.

Gen Z and Millennial consumers make up a significant portion of the cannabis market and are poised for purchase power growth in the coming years as they age.

The latest government research suggests 16% of Americans over the age of 21 have used marijuana in the past month—these figures jump to 26% among 21 to 34-year-olds.<sup>1</sup>

**Understand how younger generations are interacting with cannabis products to better anticipate the future of the category.**

<sup>1</sup>[2022 NSDUH Study](#)

## Growing market.

As additional states explore legalizing cannabis products and new offerings enter the space, brands should prepare for increased adoption and returning users.

To date, 38 states have legalized the use of medical marijuana and 24 states have legalized recreational use, with more states expected to pursue legalization this year.<sup>2</sup>

**Explore the habits of consumers in states where cannabis products are already legal to anticipate changes ahead of new legislation.**

<sup>2</sup>[National Conference of State Legislatures](#)

## Growing appetite.

Cannabis use has a noteworthy impact on food and beverage consumption habits, making it an especially important topic for brands or retailers in the consumables space.

Businesses without direct ties to the consumables space can still capitalize on cannabis use by understanding the broader behaviors, interests, and hobbies of users.

**Evaluate your brand's current exposure to cannabis users to identify opportunity areas and estimate the impact of increased usage.**



## Want to go deeper into the weeds?

Reach out to our team to learn more about how cannabis is impacting your brand or category.

[hello@numerator.com](mailto:hello@numerator.com)