

PERCEPTION IS PARAMOUNT: LEVERAGING BEHAVIORAL SCIENCE TO DRIVE INNOVATION FOR THE CANNABIS CONSUMER

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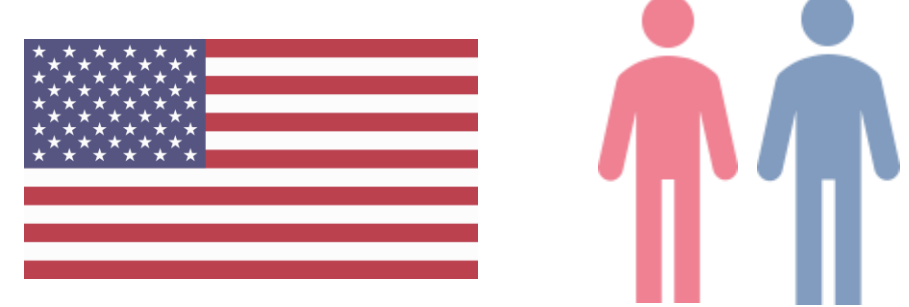
KEY TAKEAWAY:

- User perceptions differ among product formats, with dried herb, flower, and bud fitting well, while topicals and beverages offer untapped potential before big consumer packaged goods companies enter.
- Cannabis users are well-informed, versatile in product formats, and frequent consumers, while non-users are uncertain about legality, favor medical use, and prefer edibles.
- Perceptions of dried herb, flower, and bud align with user needs, while topicals and beverages present an unmet opportunity to create differentiated products before larger companies enter the market.



Consumers must navigate a growing marketplace of cannabis products, including novel and potent formulations, necessitating a better understanding of their potential health risks and benefits.

METHODS



USERS

NON-USERS

Our research used max-diff scaling to determine users' unmet needs around cannabis-containing products, and to uncover potential need gaps for non-users that cannabis might fill. Additionally, implicit association testing was used to explore associations between cannabis product formats and key descriptors of product attributes and consumer emotions.

MAX DIFF SCALING

Most Important	ATTRIBUTE	Least Important
•	SAFE	•
•	INTOXICATING	•
•	SMELLS/TASTES GOOD	•

Most important when choosing cannabis products & **least** important

IMPLICIT ASSOCIATION TEST



This type of cannabis product would be/make me feel...

CONSUMER INSIGHTS

WHAT CAN WE LEARN FROM PERCEPTIONS?

USERS
Frequency: More than 1x per week

NON-USERS
Potential re-initiators: Almost ¾ reported trying cannabis at some point in their life, but only ½ are current users

✓ Legal-eagles: Know the legality status in their state

⚖️ Pro-prohibition: Recreational use should be illegal, but medical use is OK

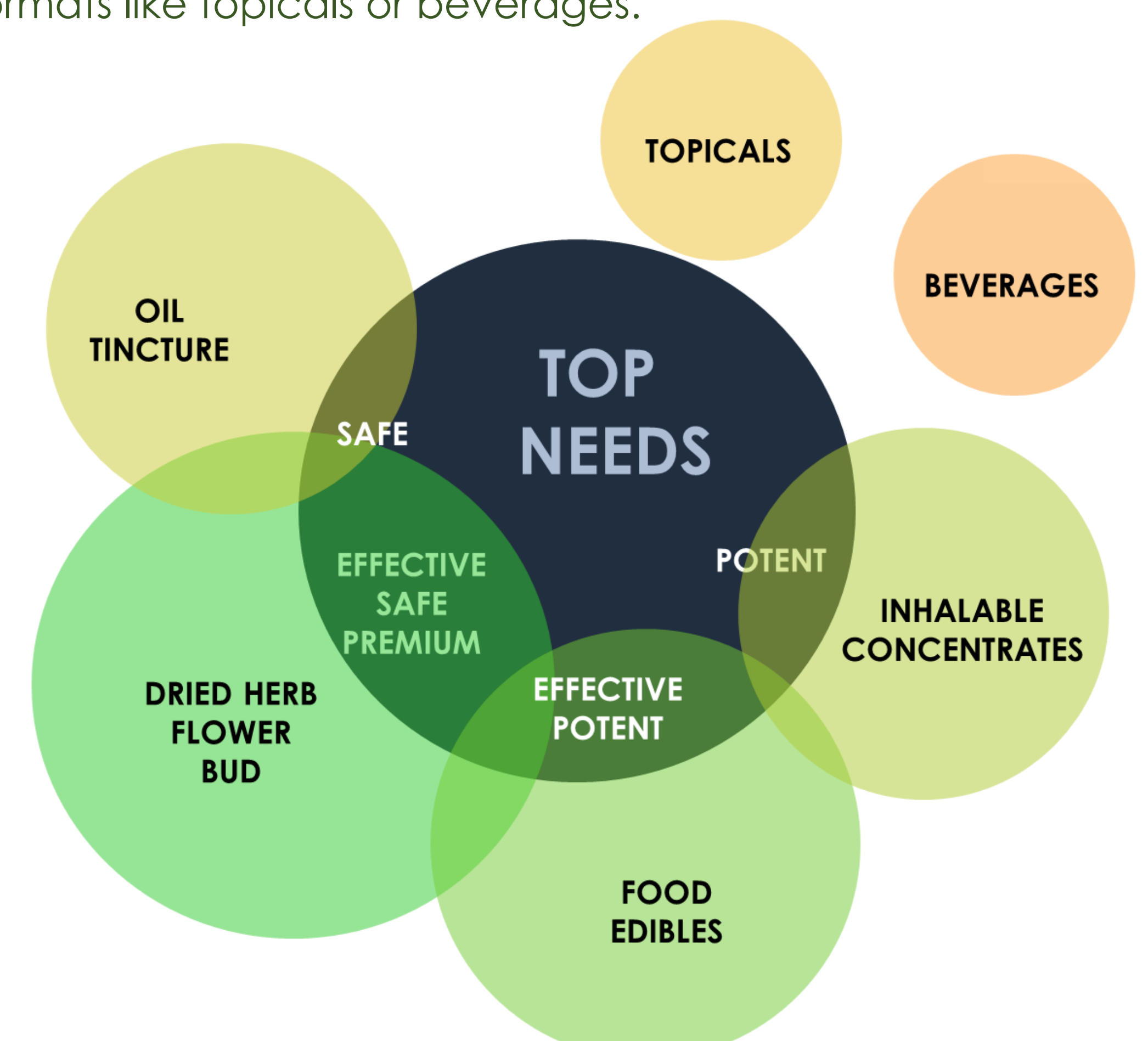
Format	USERS				NON-USERS		
	Familiarity	Ever Used	Currently Use	Likelihood of Purchase	Familiarity	Ever Used	Likelihood of Purchase
Dried herb/flower/buds	High	High	High	High	Low	Low	Low
Food/edibles	Medium	Medium	Medium	Medium	Low	Low	Low
Beverages	Low	Low	Low	Low	Low	Low	Low
Oral oils & tinctures	Medium	Medium	Medium	Medium	Low	Low	Low
Inhalable concentrates	Medium	Medium	Medium	Medium	Low	Low	Low
Topicals	Low	Low	Low	Low	Low	Low	Low

User Unmet Needs:

WHAT CAN WE LEARN FROM PERCEPTIONS?

ALL FORMATS ARE NOT PERCEIVED EQUALLY.

Opportunity to create products that meet the top needs in formats like topicals or beverages.



Understanding cannabis consumers' needs and wants is essential to the development of valued products that deliver on their promise.