# Cannabis Consumers in America 2023

## Part 1: An Overview of Consumers Today

New Frontier® data

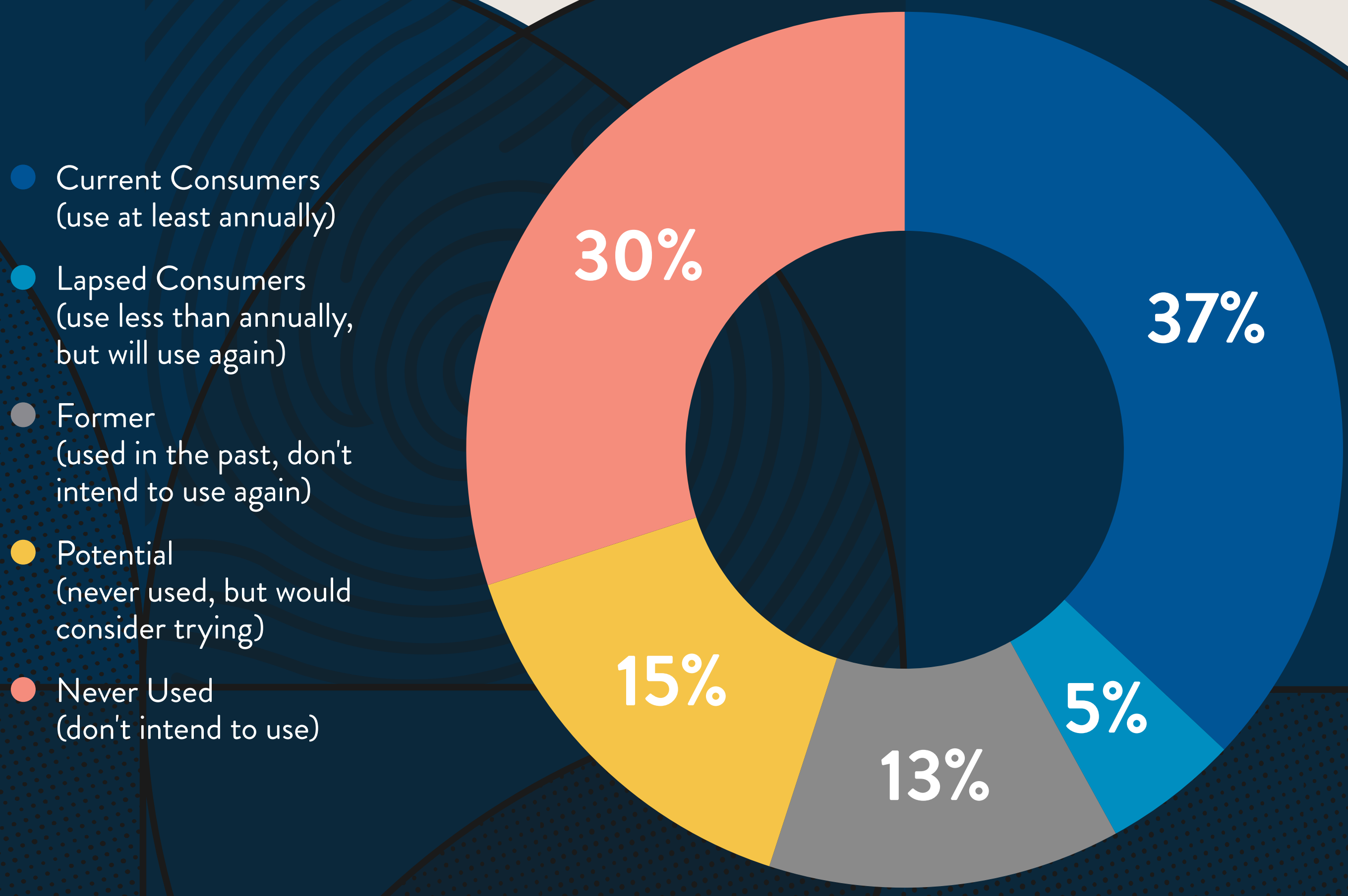
# Contents

# Cannabis & U.S. Adults

### U.S. Adults' Relationship to Cannabis

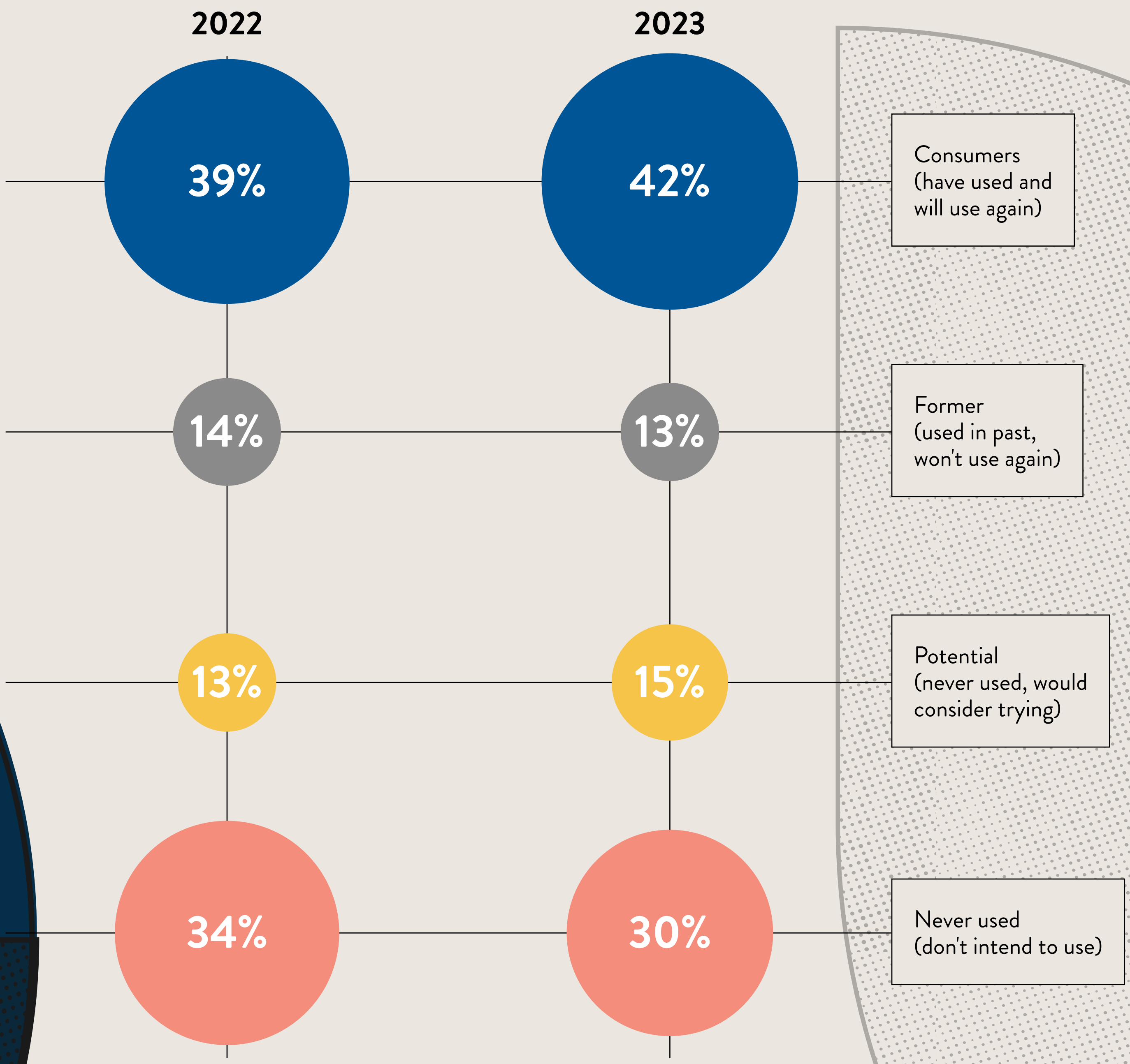
42% of U.S. adults say they have used cannabis and will likely use it again. 37% of U.S. adults are "current consumers" – those who use at least annually and plan to use cannabis again in the future. Unless otherwise specified, all charts in this report describe current consumers.

**42%**
of U.S. adults have used cannabis and say they will use it again.



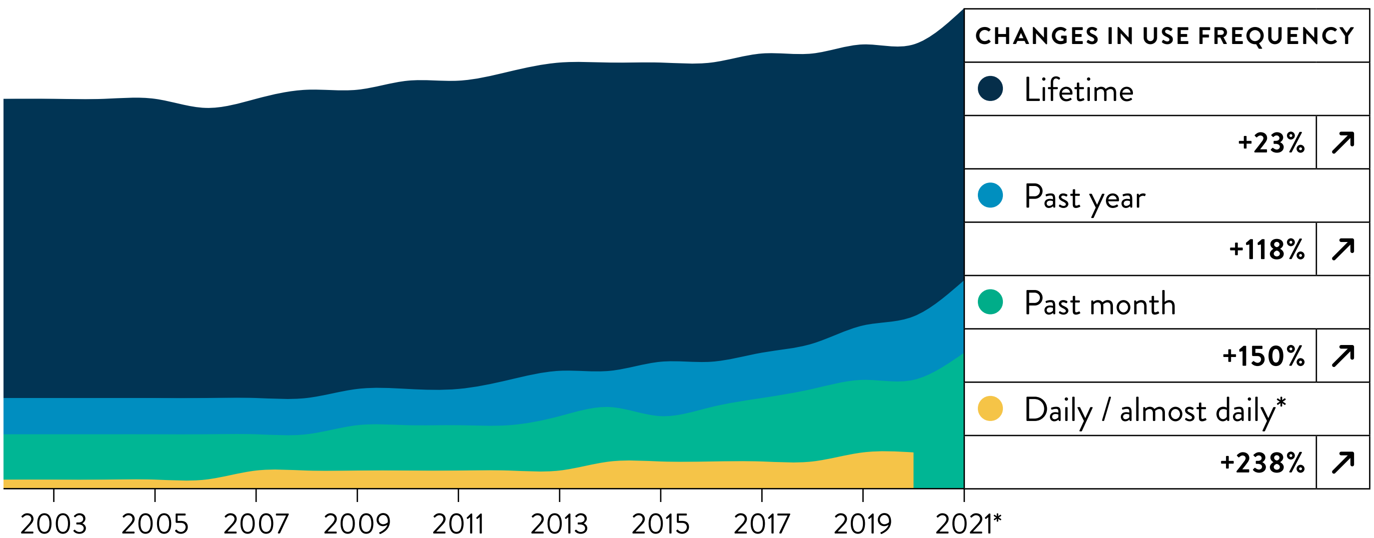
## U.S. Adults' Relationship to Cannabis: **2022 vs. 2023**

There has been a slight increase in the share of U.S. adults who are cannabis consumers since last year. The share of U.S. adults who say they never have and never will consume cannabis has decreased slightly from last year – down to 30% from 34% – indicating an increase in openness to cannabis among U.S. adults.



# U.S. Consumers in Context

## U.S. Adult Cannabis Consumption Rates

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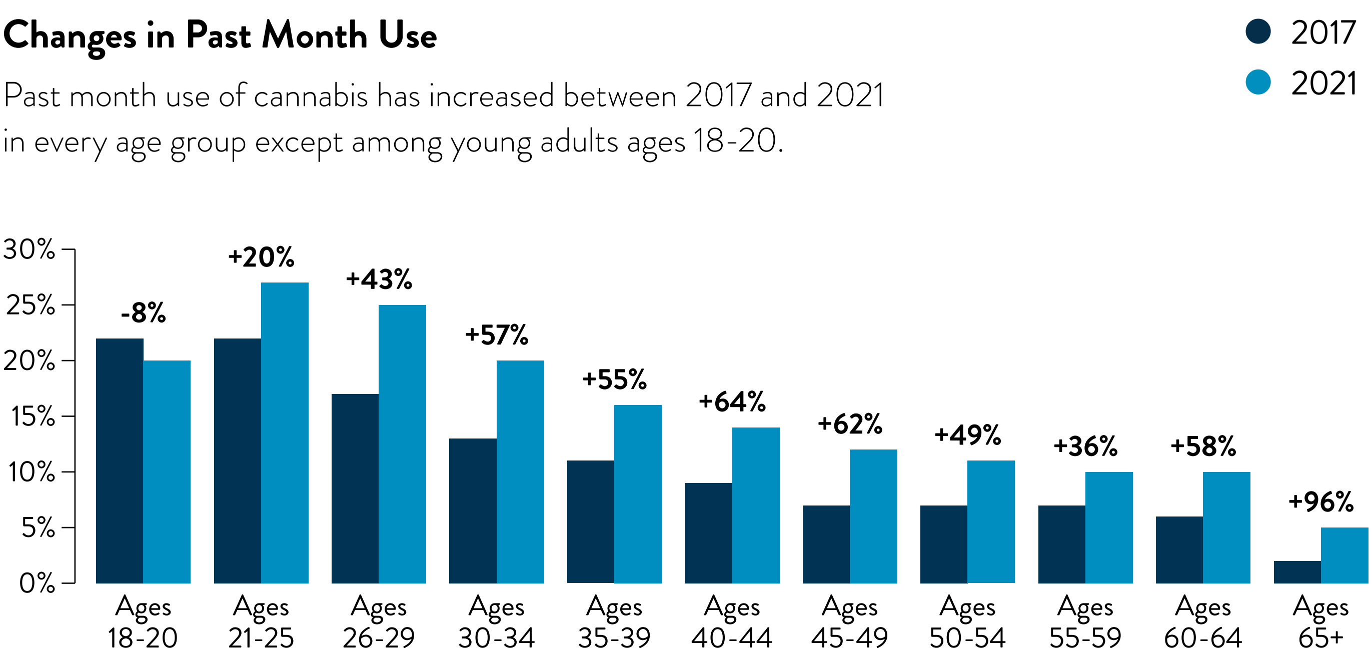
## Changes in Past Month Use

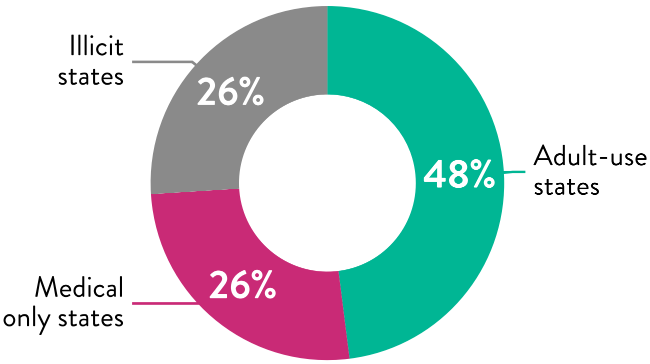
Past month use of cannabis has increased between 2017 and 2021 in every age group except among young adults ages 18-20.




*Source this page: SAMHSA*
**Daily/almost daily rates were not available in 2021; growth rate for daily/almost daily use is based on 2020 data.*

## Home State Cannabis Laws

Percent of total U.S. population.




| | |
|---|---|
| ADULT-USE STATE | **160.2 million** |
| MEDICAL STATE | **87.7 million** |
| ILLICIT STATE | **88.7 million** |

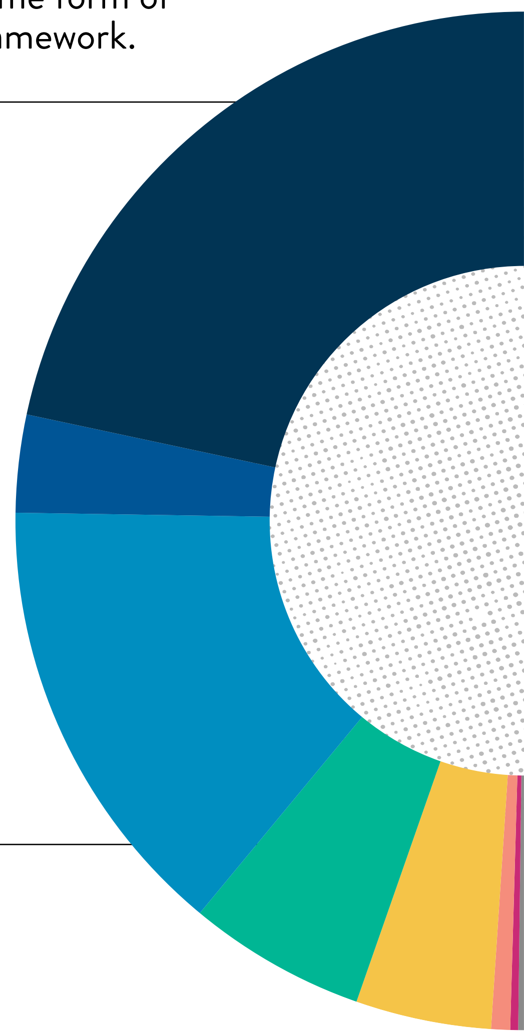
# 74%

of the total U.S. population lives in a state with some form of legal cannabis framework.

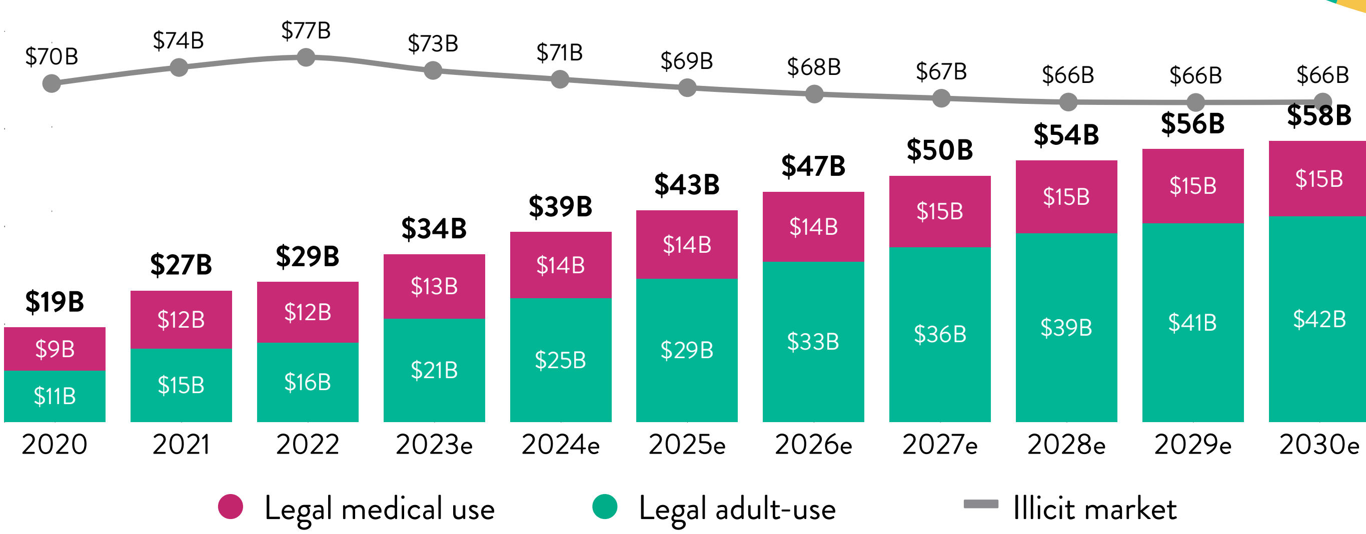
## Product Share of Sales

In legal markets, 2022 average.

- Flower: **43%**
- Preroll: **6%**
- Vape: **29%**
- Edible/ Beverage: **11%**
- Extract: **9%**
- Tincture: **1%**
- Topical: **0.5%**
- Other: **0.4%**



## Growth of the U.S. Legal Cannabis Industry

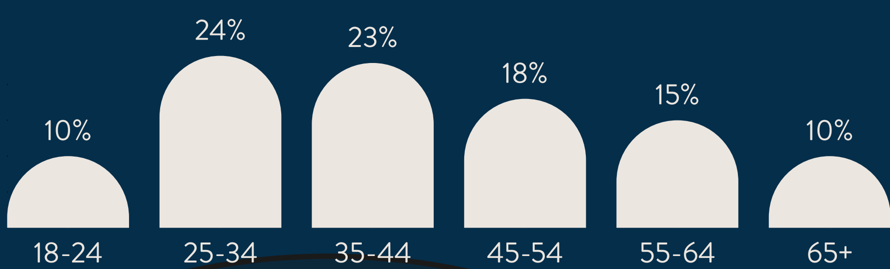


# Current Consumers

THIS REPORT FOCUSES ON CURRENT CONSUMERS, OR THOSE WHO USE CANNABIS AT LEAST ANNUALLY.

## Who are the current cannabis consumers?

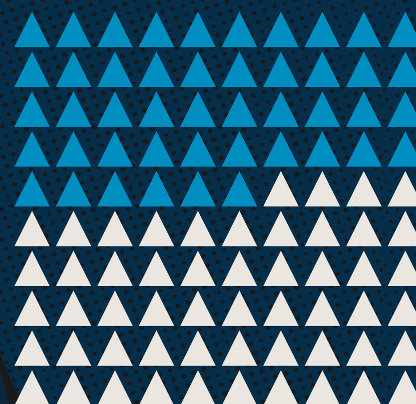
### Age




**57%** of current consumers are under age 45.

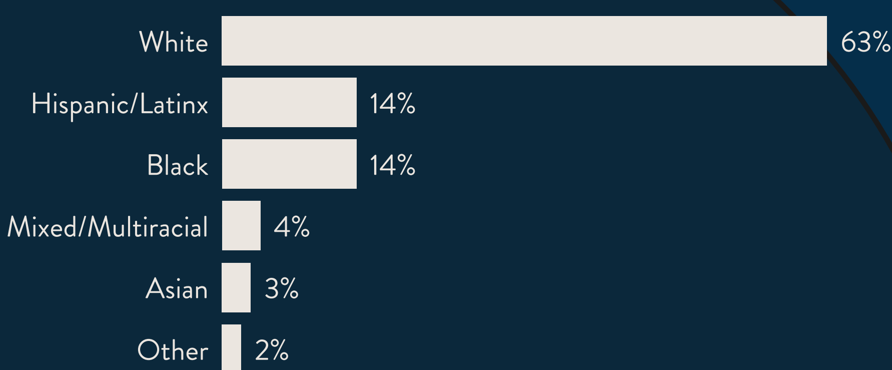
### Gender

Women: **46%**

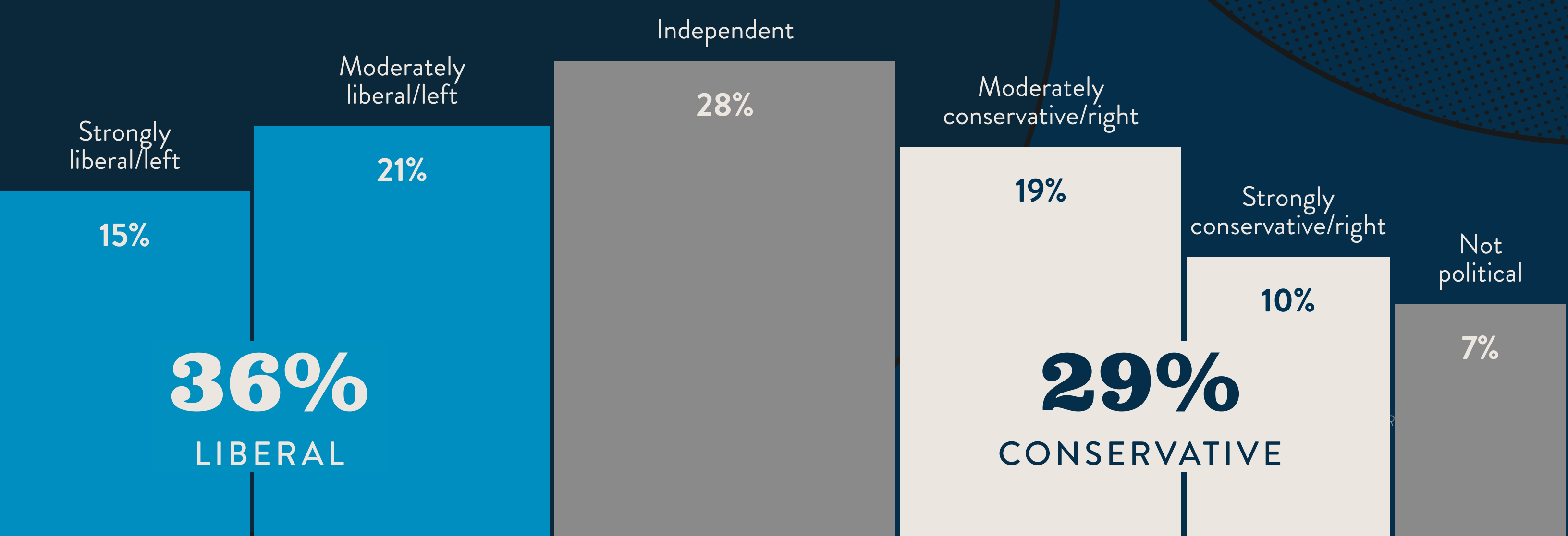


Men: **54%**

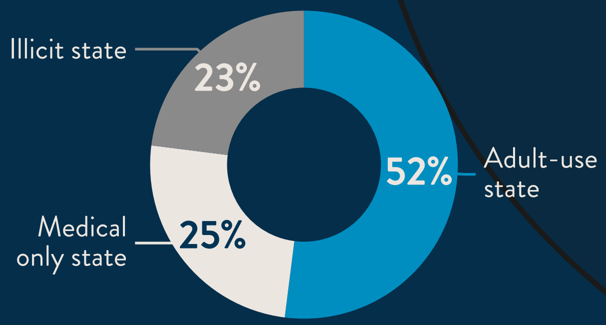
### Racial/Ethnic Identity



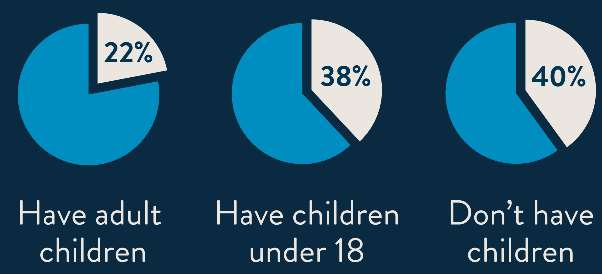

### Political Alignment



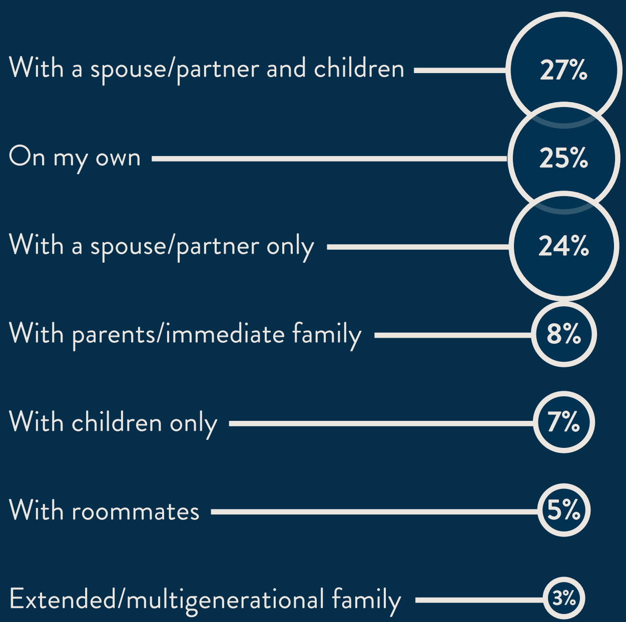
## Home State Cannabis Laws



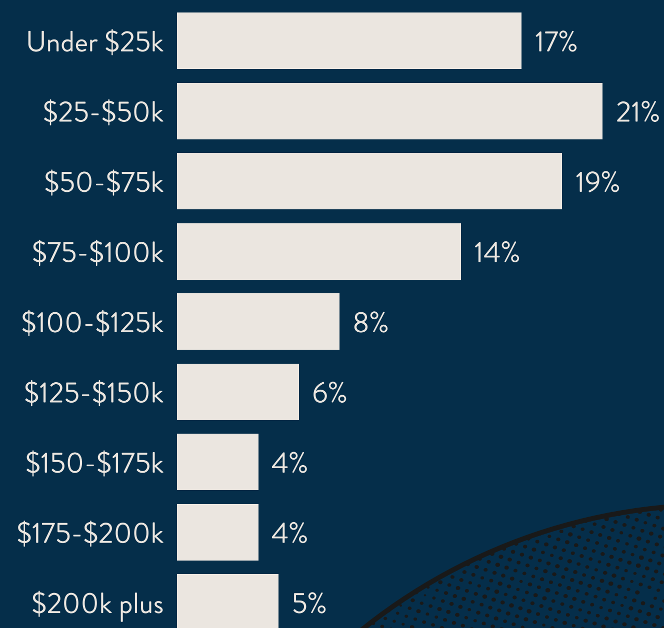

## Parenthood



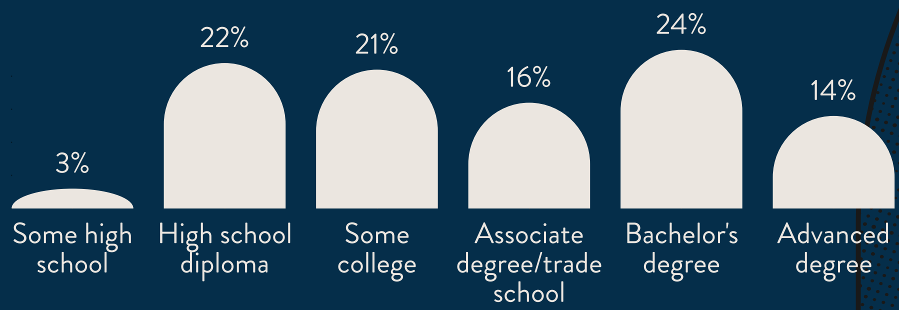

## Living Situation




## Annual Household Income



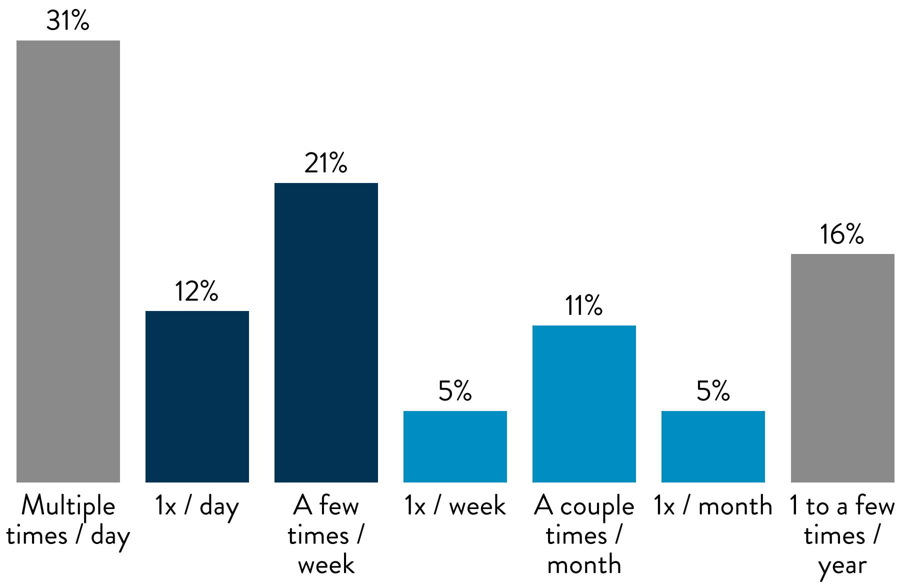

## Education




**38%**

have a bachelors degree or higher.

# Use Frequency




**33%**

use once every day or two.

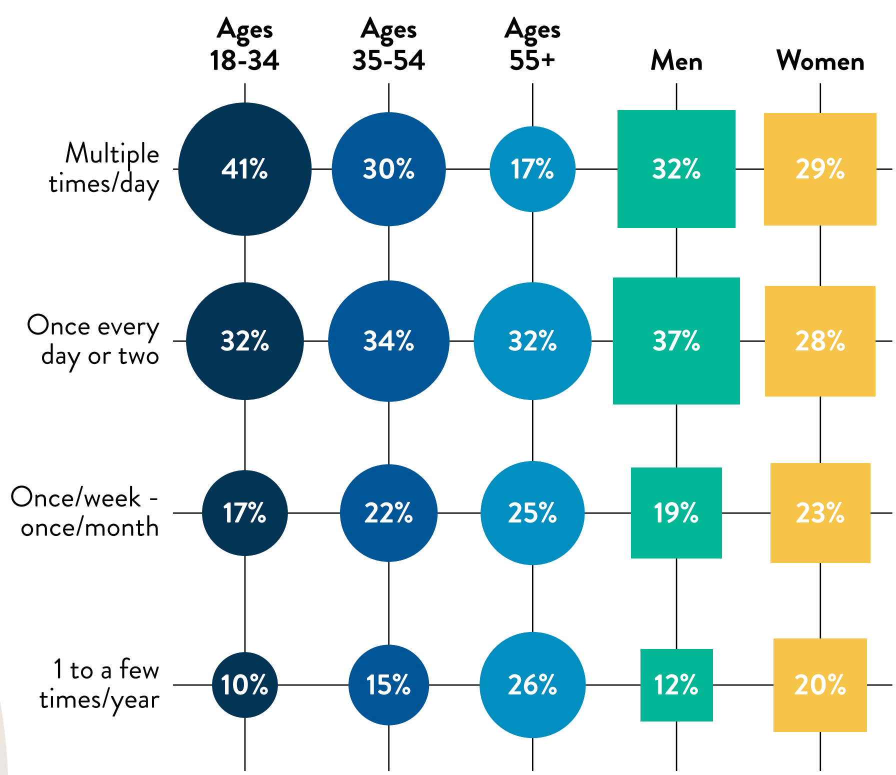
**21%**

use once a week to once a month.

Younger consumers generally use cannabis more frequently than do older consumers, and men use cannabis slightly more frequently than women on average.

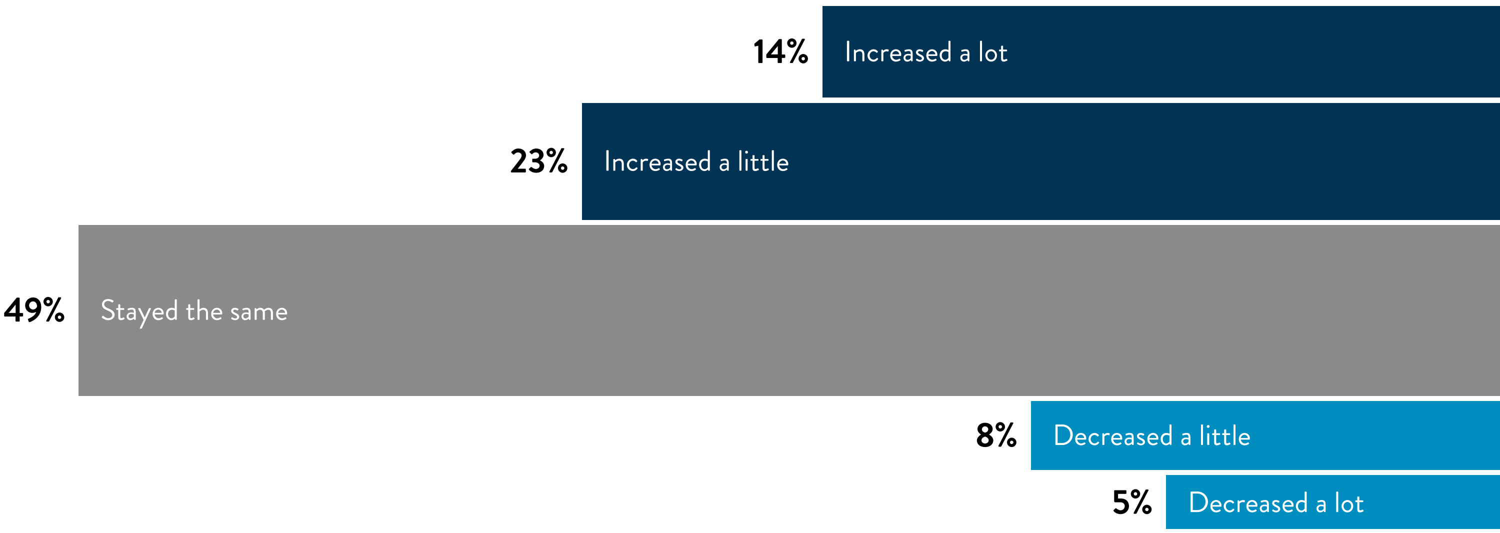
**Use frequency does not vary significantly by home state market type.**

Use Frequency: **By Age & Gender**



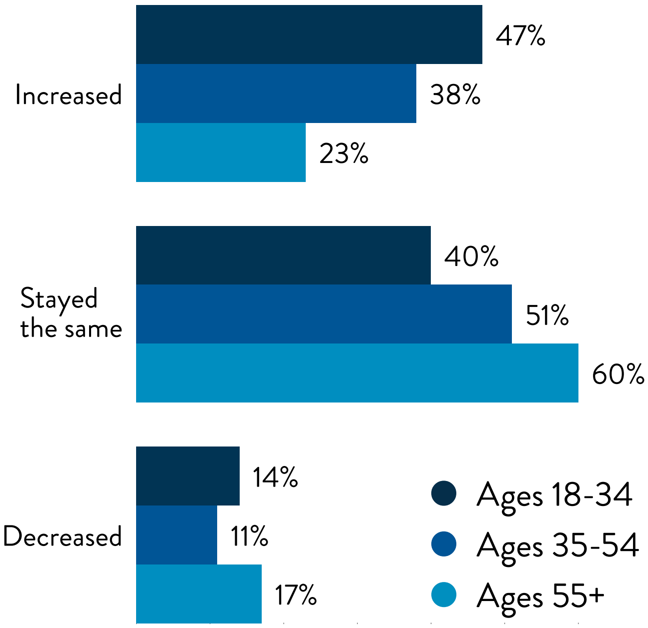
## Change in Consumption Since 1 Year Ago

**37%** INCREASED | **13%** DECREASED



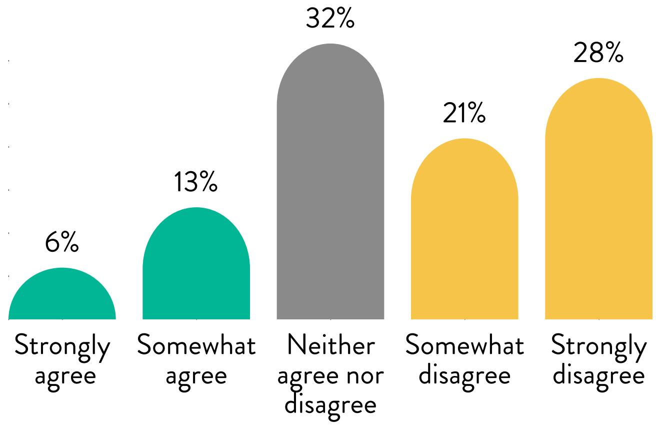

## Change in Consumption Since 1 Year Ago: **By Age**

Younger consumers are more likely than older consumers to report that their use increased in the last year.




## I would like to cut back on my cannabis consumption.

Despite some self-reported increases in use, fewer than one in five consumers want to cut back on their use.




**19%** AGREE | **49%** DISAGREE

# Motivations for Use

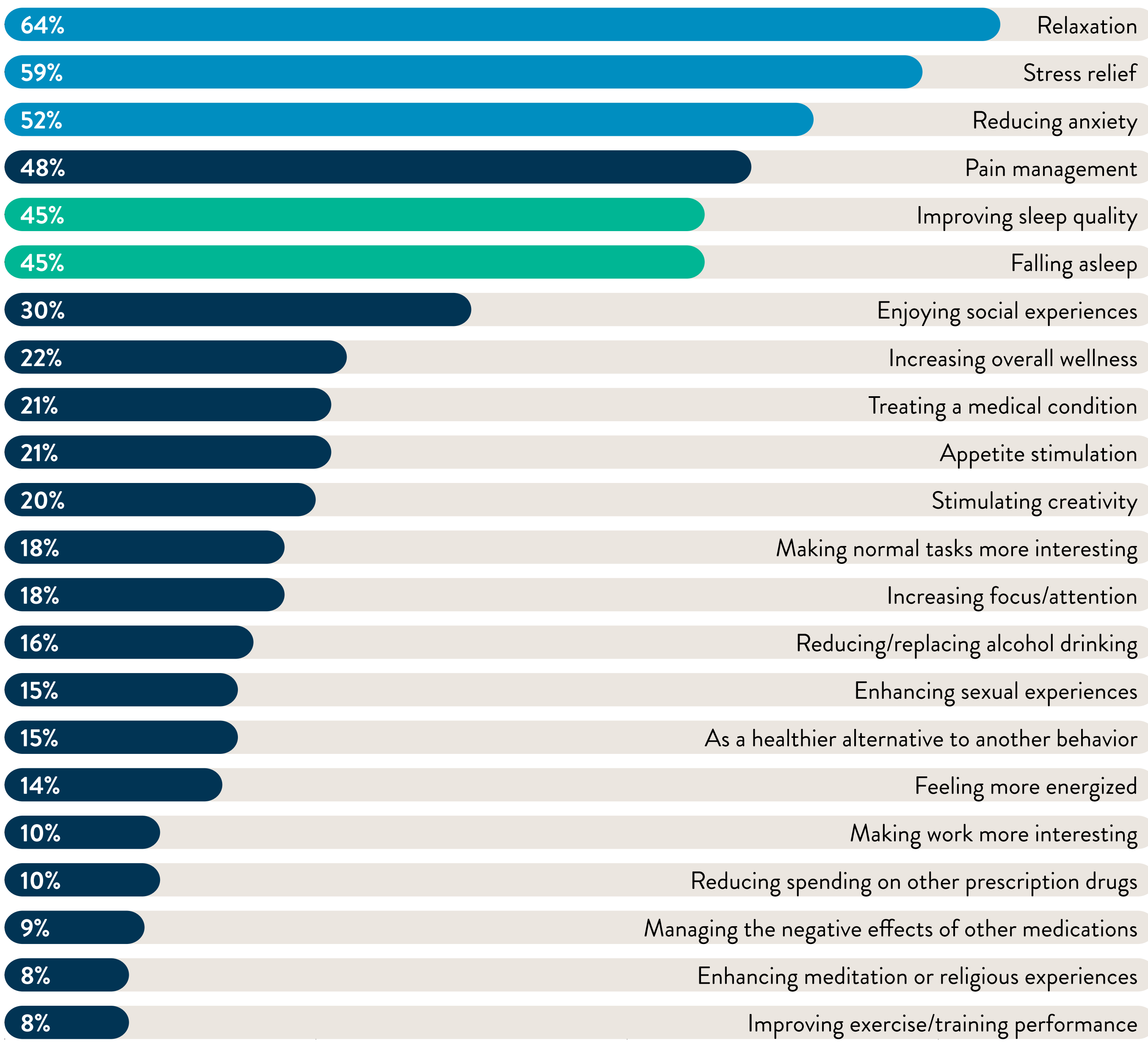
Unwinding (relaxation, stress relief, reducing anxiety), pain management, and aiding sleep are the leading reasons consumers report using cannabis.

**83%**

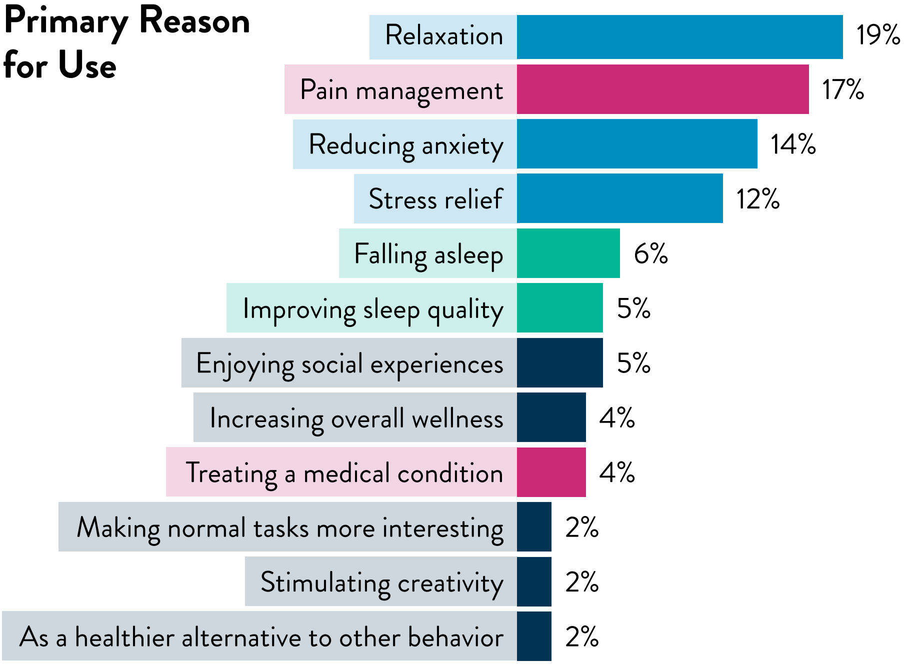
use for unwinding (relaxation, stress or anxiety).

**61%**

use for sleep (improving quality or falling asleep).



## Primary Reason for Use




**46%**

**UNWINDING**

*relaxation / stress / anxiety*

**21%**

**MEDICAL**

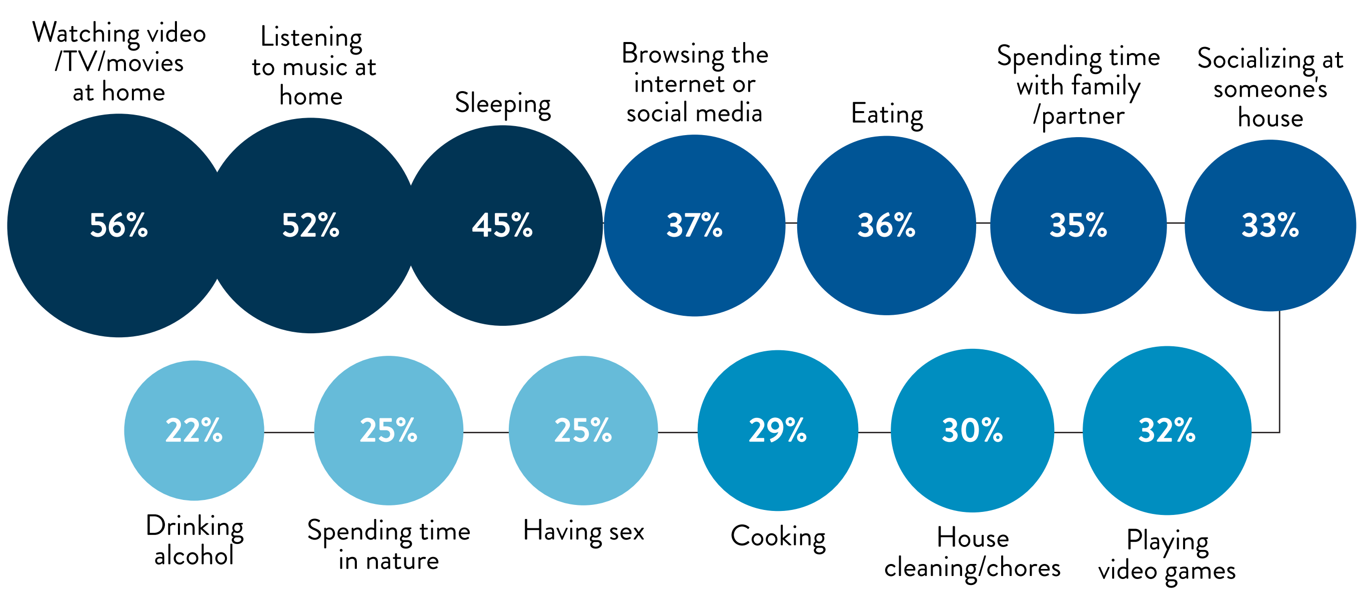
*treating pain / a medical condition*

**11%**

**SLEEP**

**70%** of current consumers say that their cannabis use helps them achieve a specific objective.

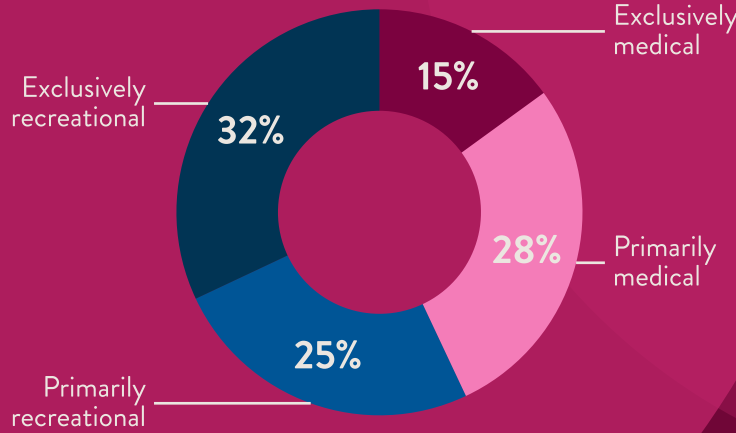
## Activities While/After Consuming



# Medical Consumers

## Self-Identified User Type

While more consumers consider themselves broadly “recreational” than “medical” cannabis users, a majority (53%) describe their cannabis use as both medical and recreational.



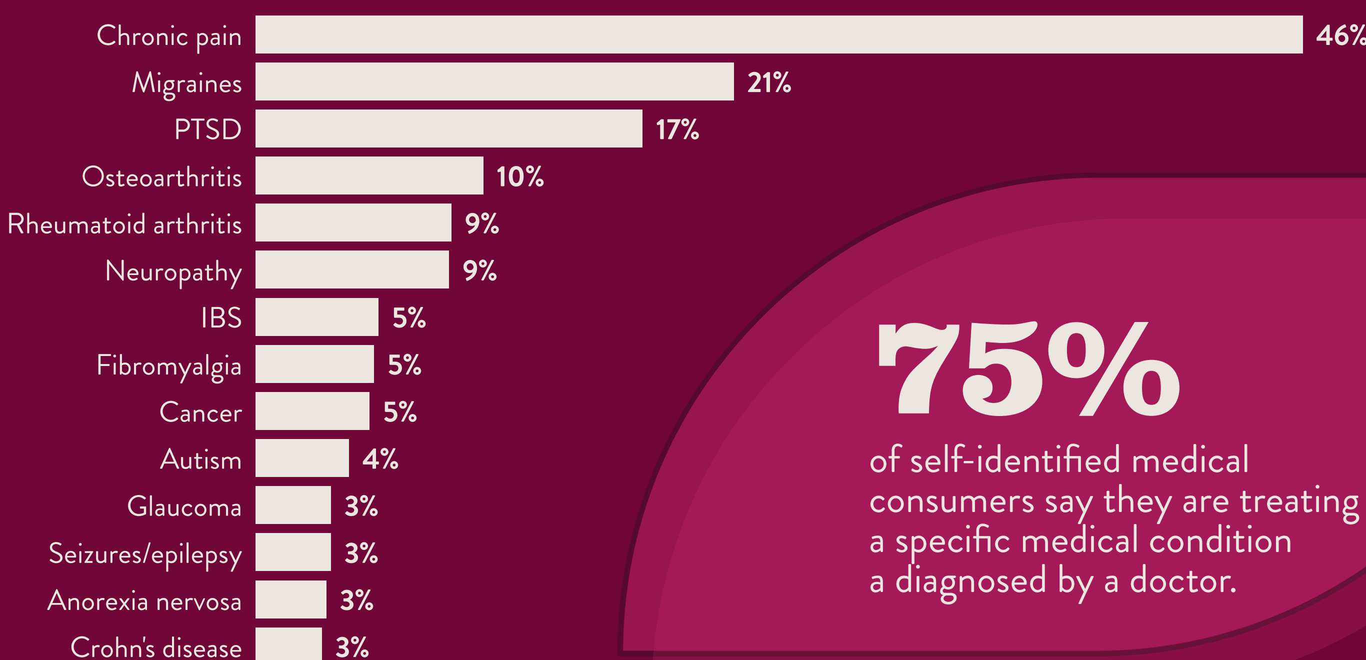

**58%** RECREATIONAL

**53%** DUAL USE

**42%** MEDICAL

## Diagnosed Medical Conditions Being Treated with Cannabis

*Among current (annual+) consumers who describe their use as primarily or exclusively medical.*

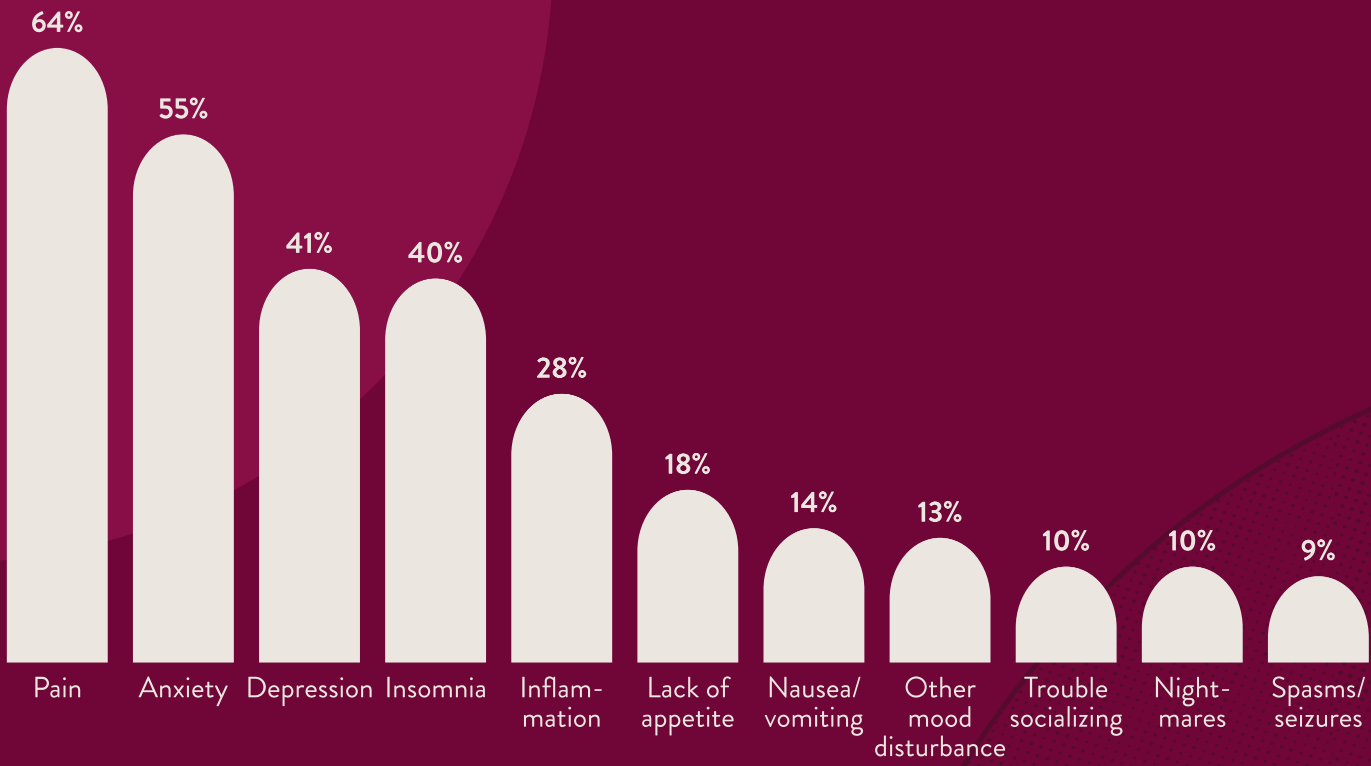



**75%**

of self-identified medical consumers say they are treating a specific medical condition a diagnosed by a doctor.

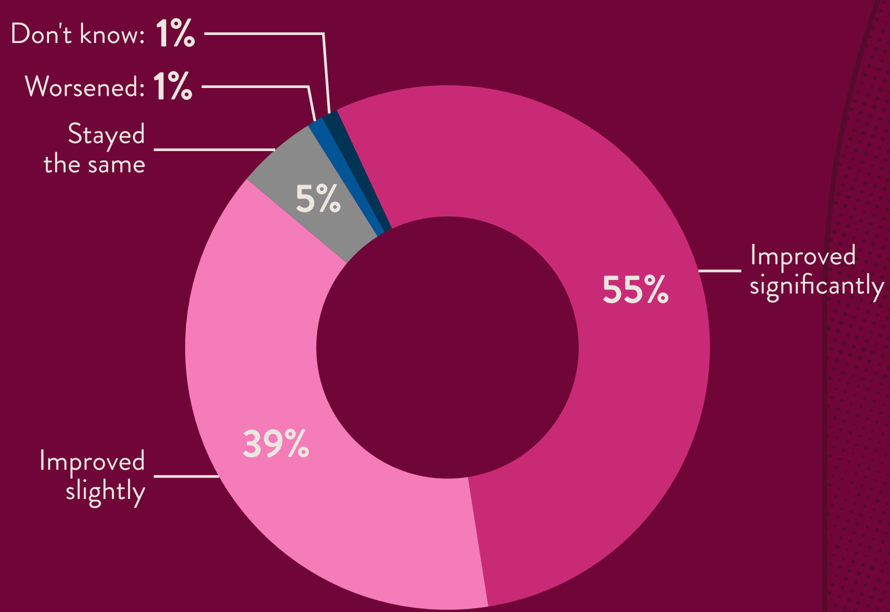
## What Symptoms Are You Treating with Cannabis?

*Among current (annual+) consumers who describe their use as primarily or exclusively medical.*




## Cannabis Impact on Medical Condition/Symptoms

*Among current (annual+) consumers who describe their use as primarily or exclusively medical.*




**94%**

say their medical condition/symptom has improved.

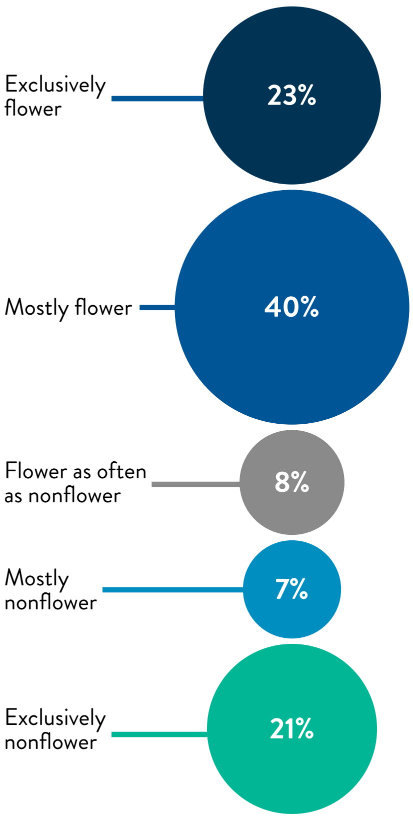
**51%**

of self-identified medical consumers say they have replaced at least some of their prescription medication use with cannabis.

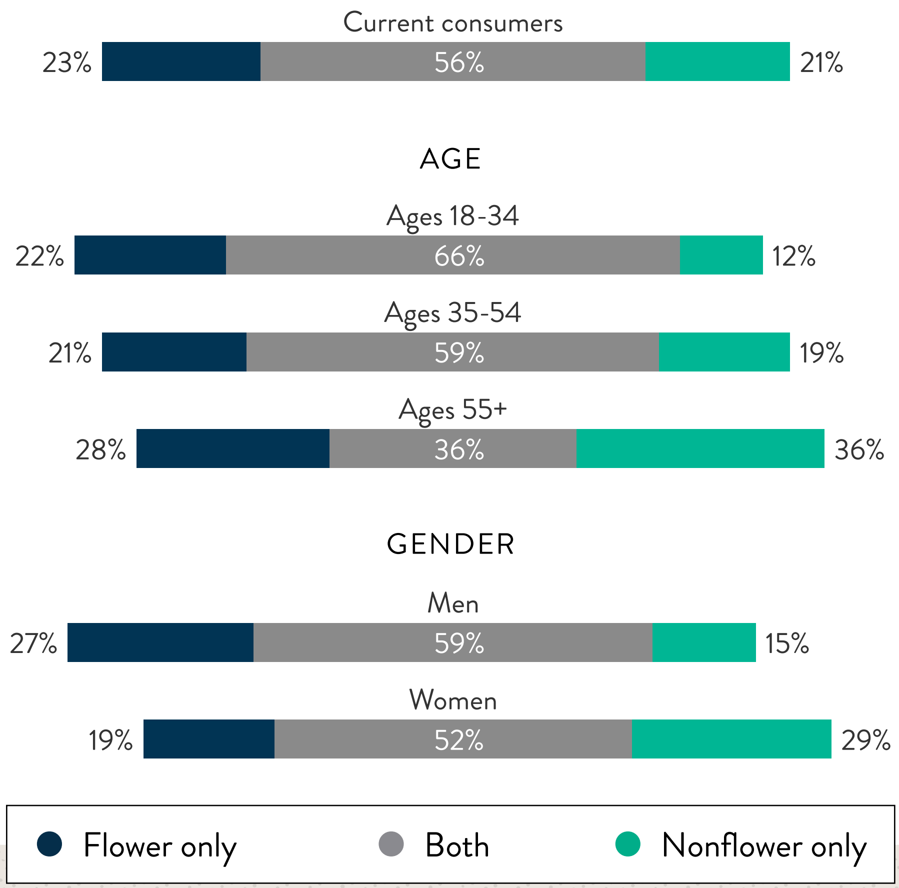
# Product Forms

## Flower vs. Nonflower

USE

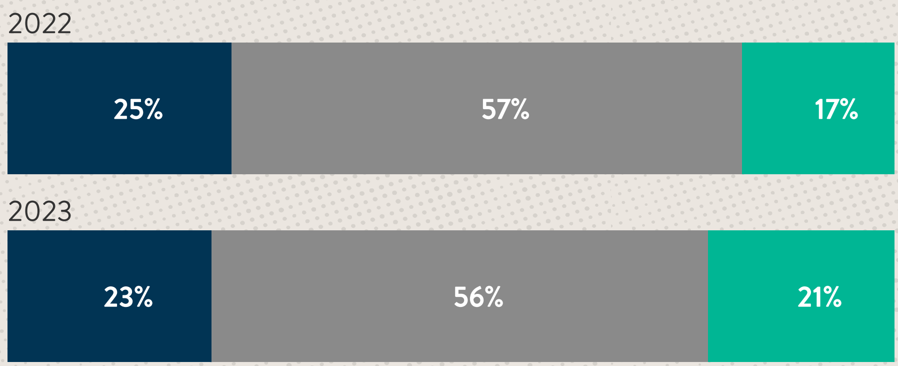



BY CONSUMER SEGMENT



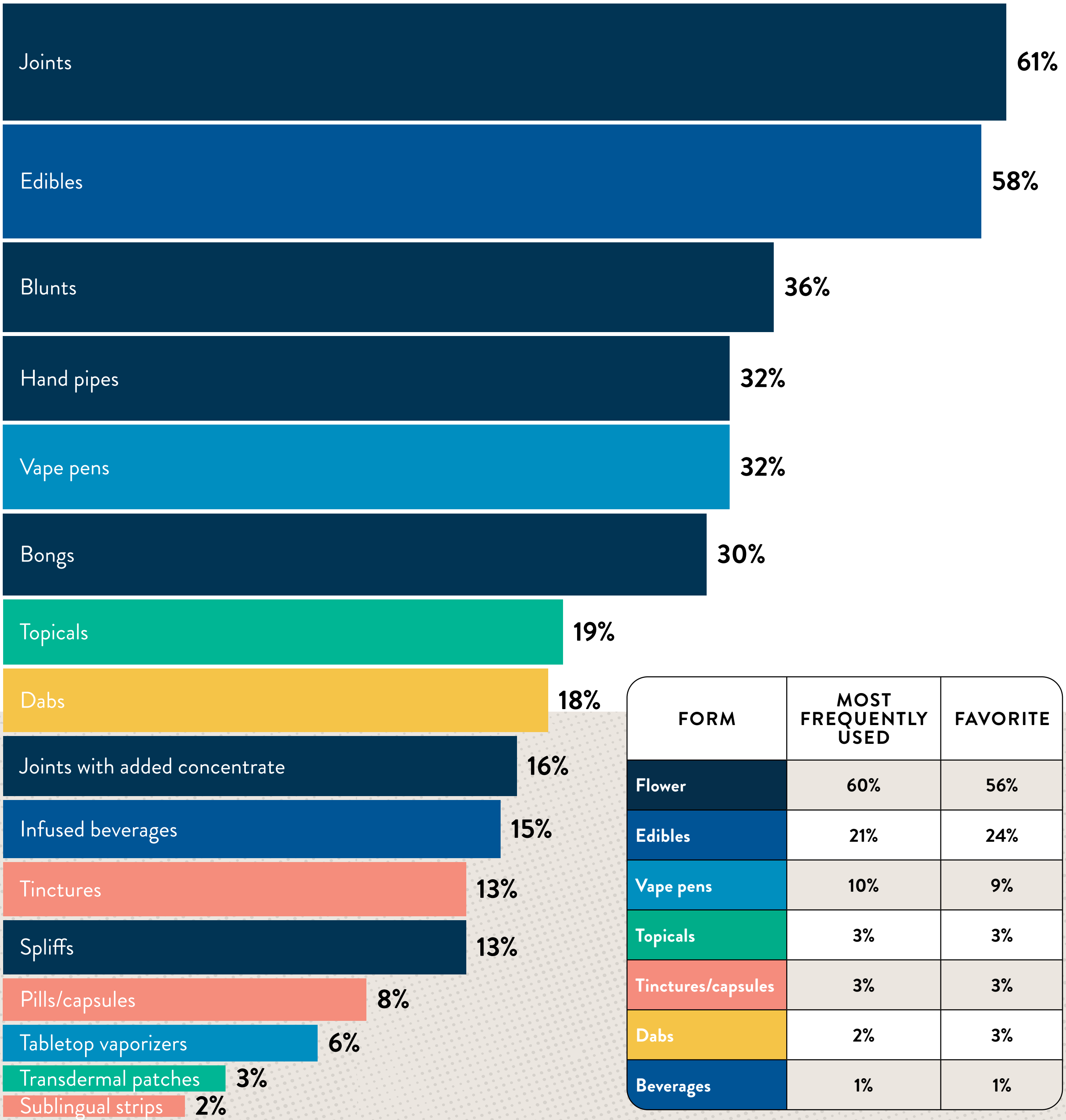

Since last year, there has been a small increase in the share of consumers who say they use exclusively non-smokable forms of cannabis (from 17% to 21%).

2022 VS. 2023



## Popular Product Forms

Joints and edibles are the leading forms, each used by a majority of current consumers. Vape pens are the next most commonly used non-flower form, with about a third (32%) of consumers using them.

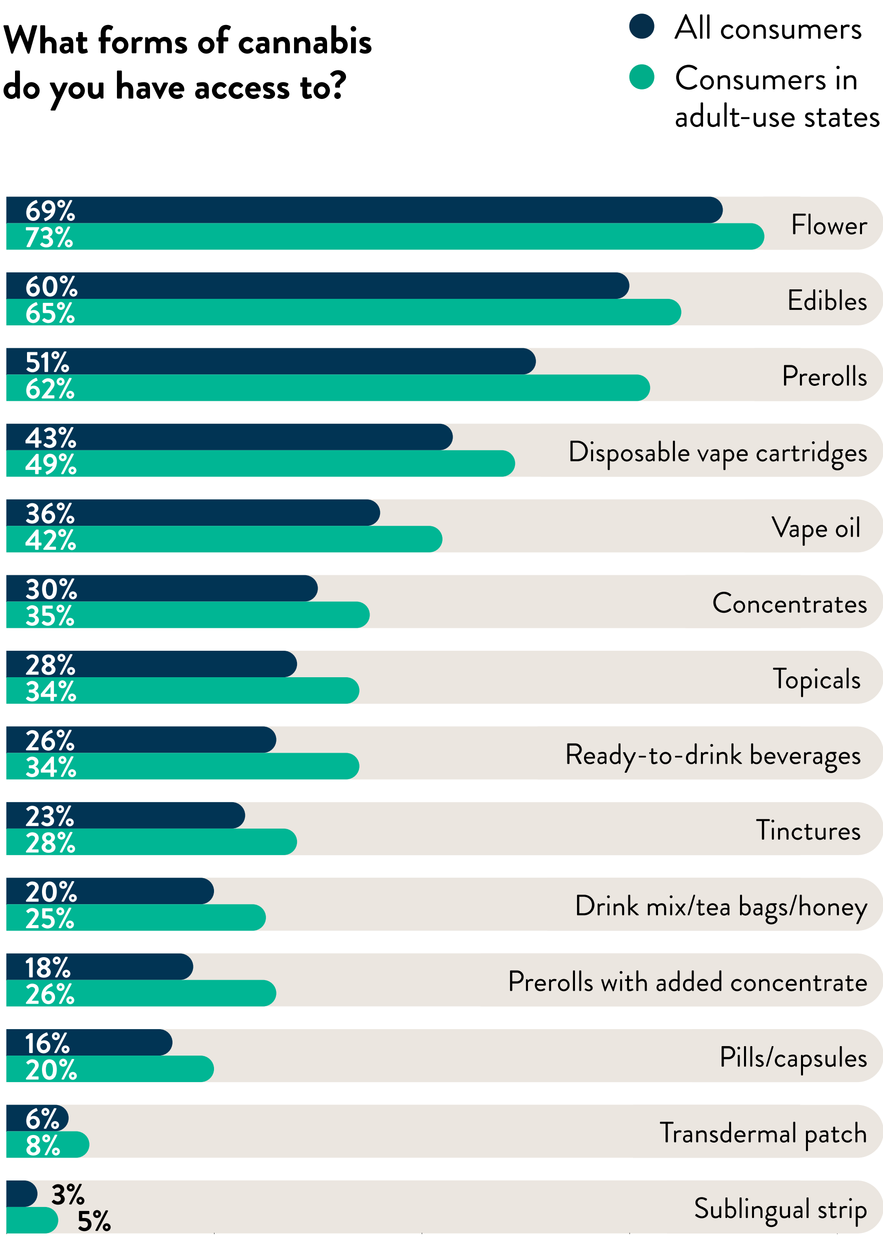



| FORM | MOST FREQUENTLY USED | FAVORITE |
|---|---|---|
| Flower | 60% | 56% |
| Edibles | 21% | 24% |
| Vape pens | 10% | 9% |
| Topicals | 3% | 3% |
| Tinctures/capsules | 3% | 3% |
| Dabs | 2% | 3% |
| Beverages | 1% | 1% |

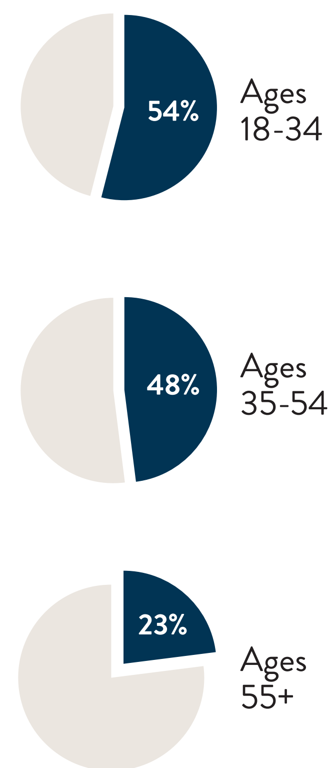
## Which forms consumers use is limited by what they have access to.

Fewer than half of consumers report having access to any forms of cannabis other than flower, prerolls, and edibles, even in adult-use states. We expect use of many of these forms to gradually increase in popularity as legal markets expand and dispensaries diversify their product offerings.

### What forms of cannabis do you have access to?




### When I hear about a new cannabis product, I am eager to try it.




**44%**

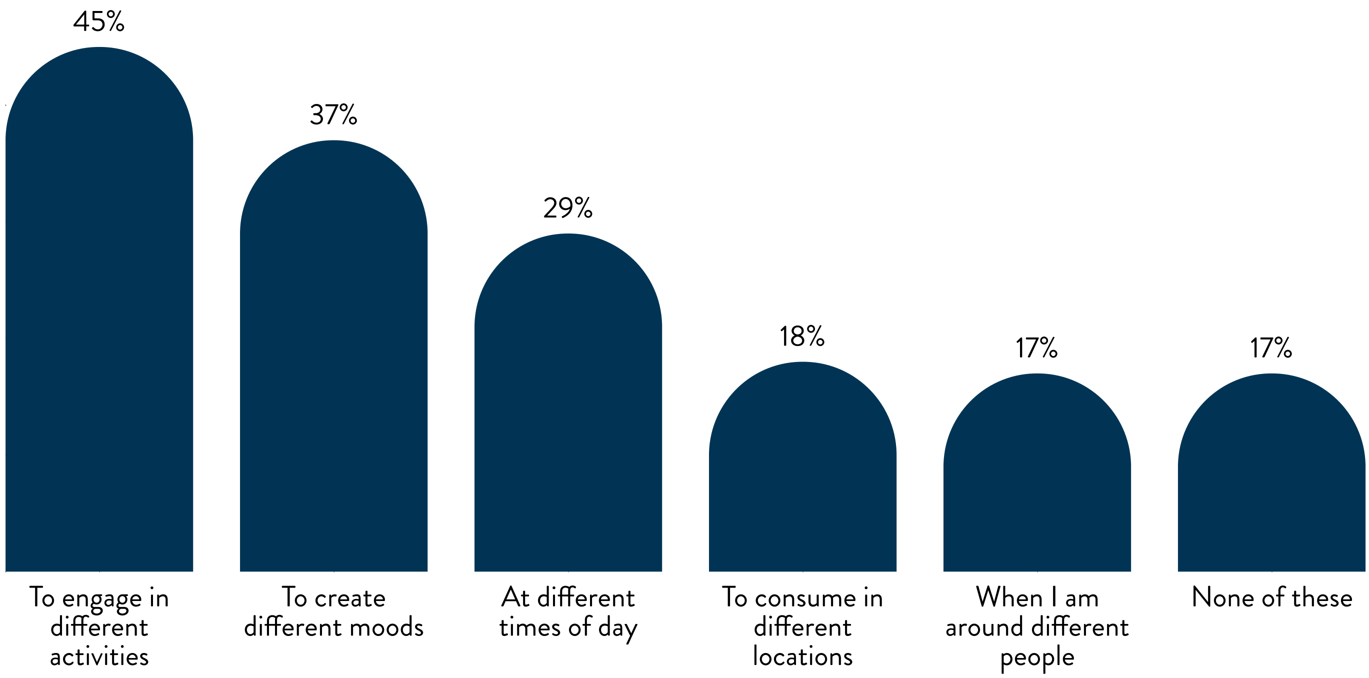
of current consumers express interest in trying new cannabis products.

**Younger consumers are especially interested in new products.**

## USE OF MULTIPLE FORMS

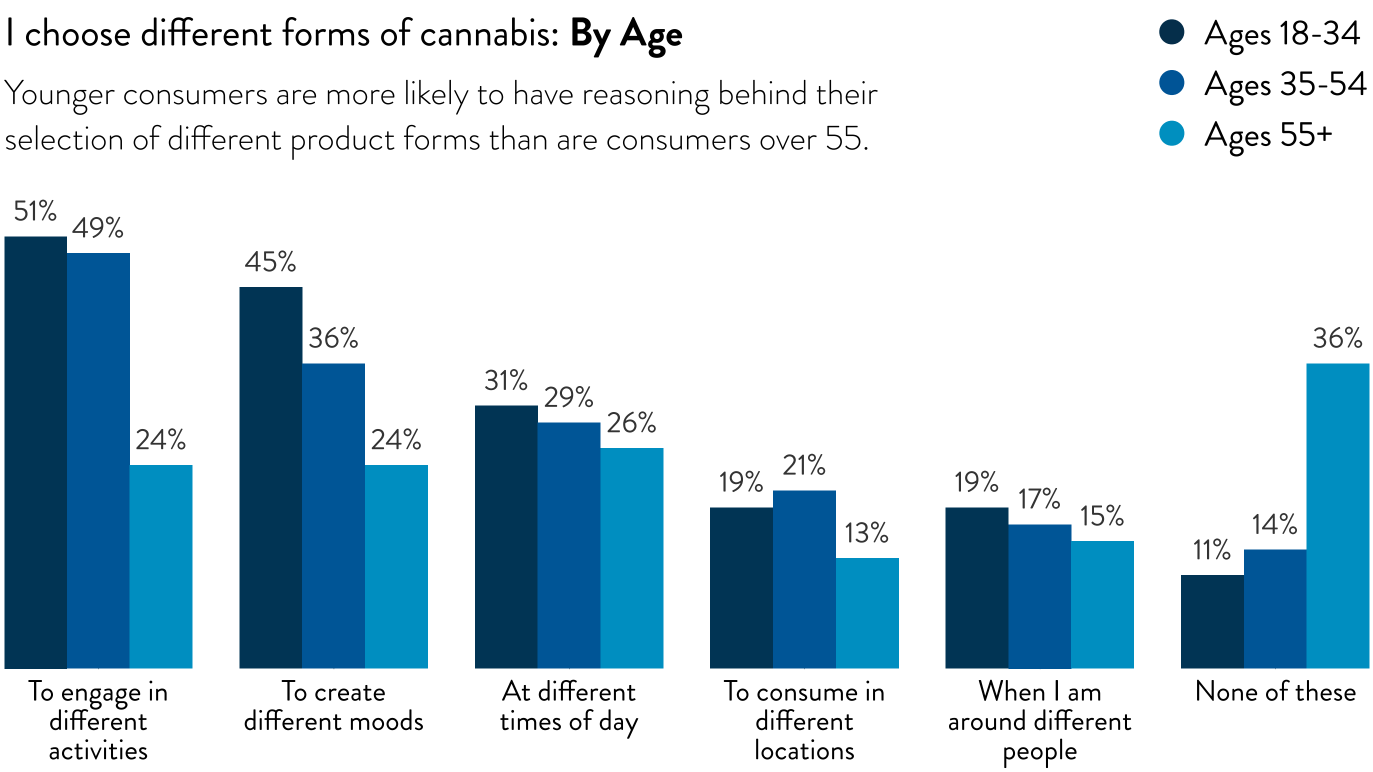
### I choose different forms of cannabis...

*Among current (annual+) consumers who use more than one form of cannabis.*




### I choose different forms of cannabis: **By Age**

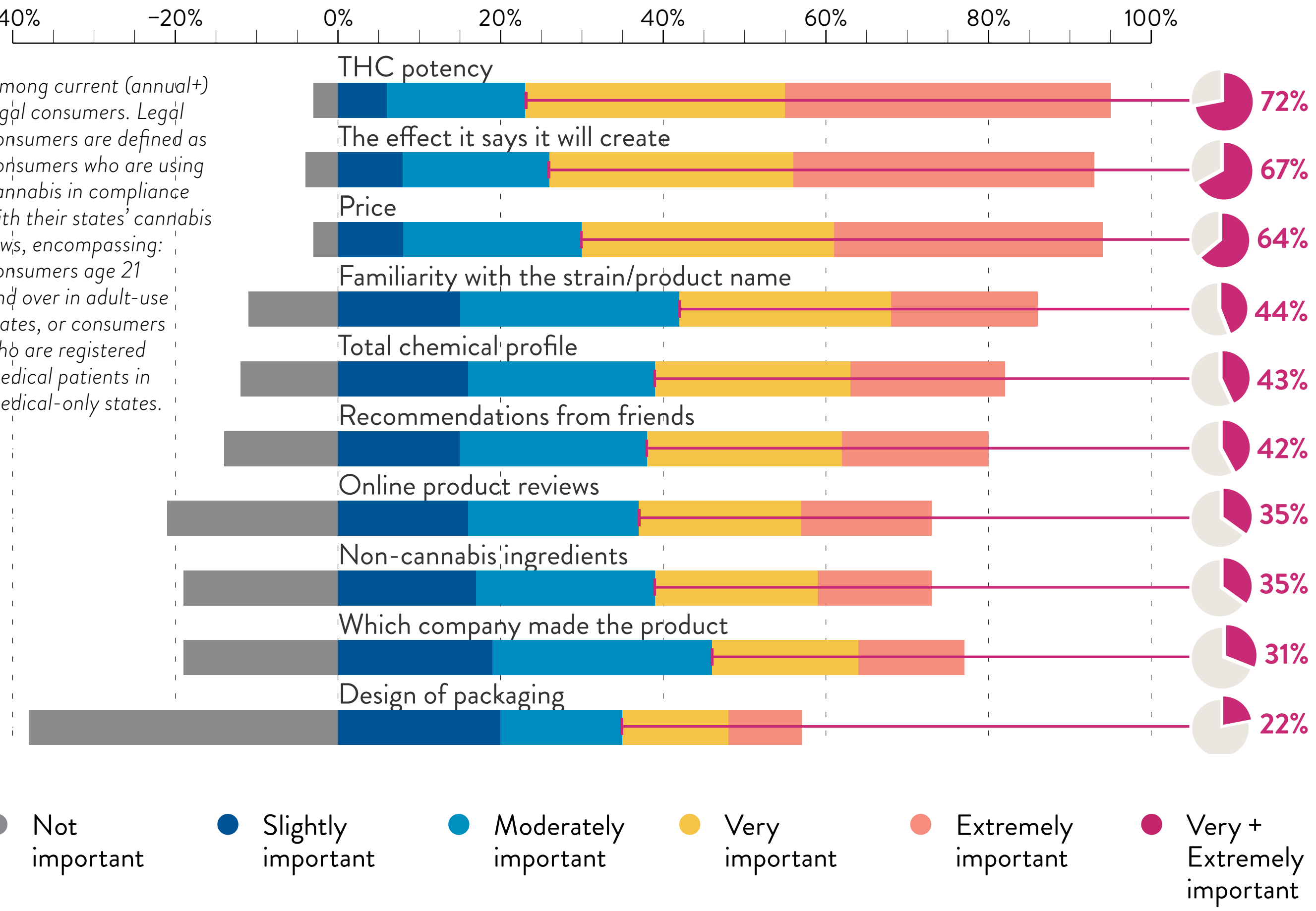
Younger consumers are more likely to have reasoning behind their selection of different product forms than are consumers over 55.




*Among current (annual+) consumers who use more than one form of cannabis.*

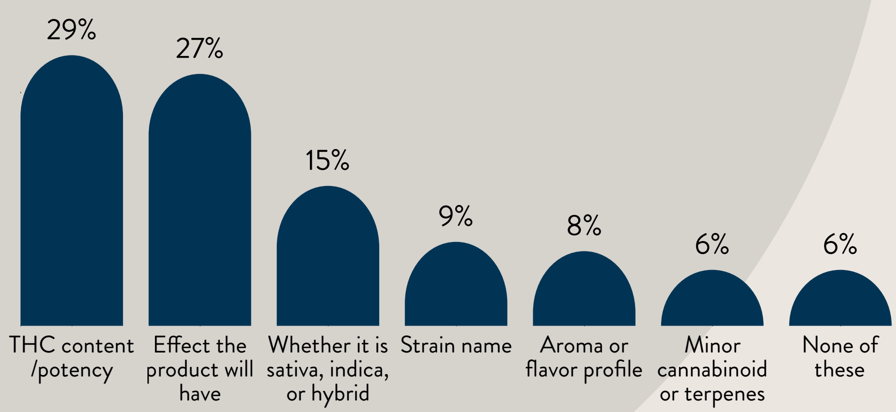
## Product Purchase Selection Factors

*Among current (annual+) legal consumers. Legal consumers are defined as consumers who are using cannabis in compliance with their states' cannabis laws, encompassing: consumers age 21 and over in adult-use states, or consumers who are registered medical patients in medical-only states.*




## Which information is most helpful to you when choosing which cannabis product to purchase or use?

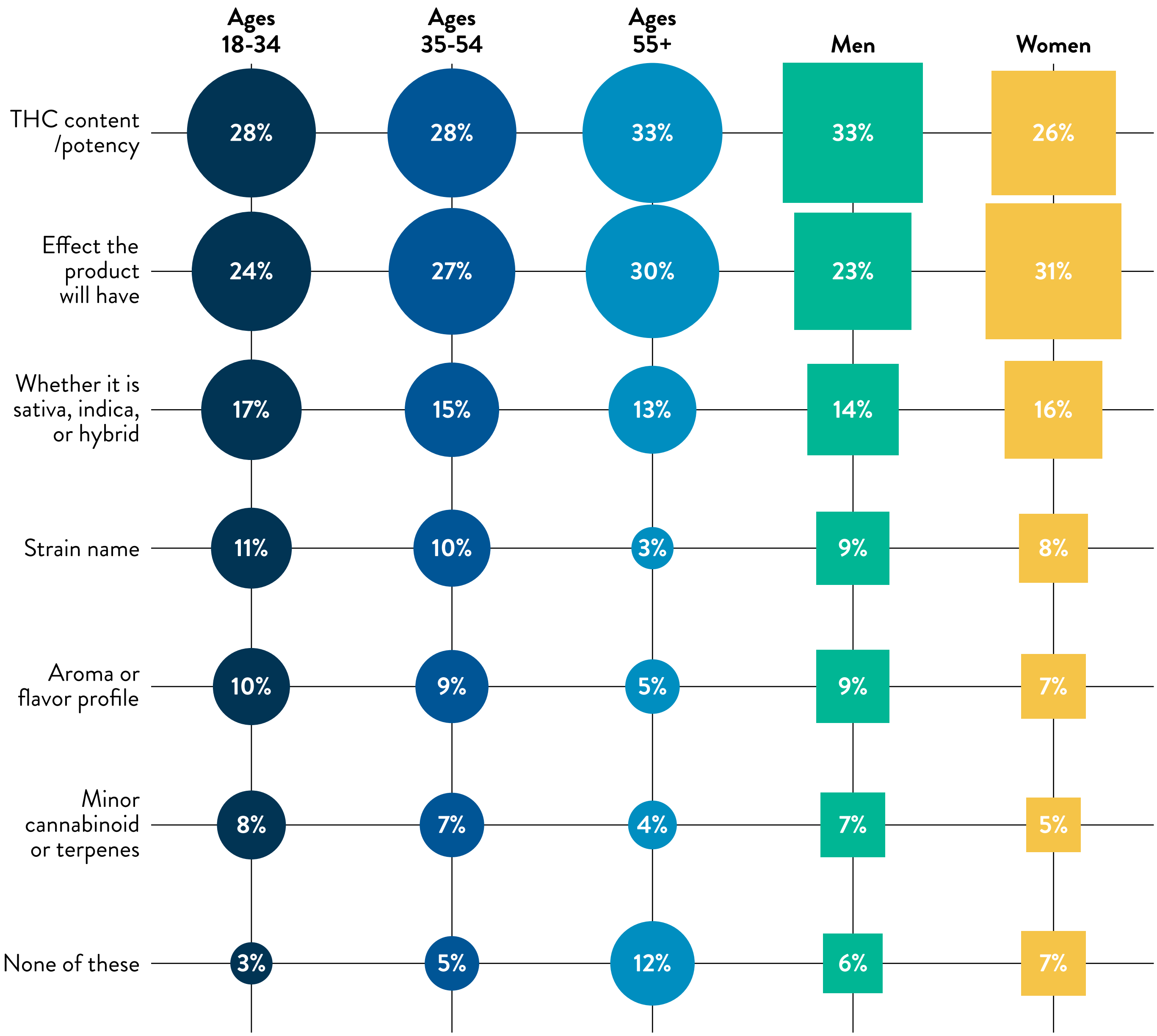
THC potency and effect of the product are the attributes that consumers say are most relevant in deciding which product to choose. 56% of consumers named one of these as the most important attribute to know about a product.



## Which information is most helpful to you when choosing which cannabis product to purchase or use: **By Age & Gender**

THC potency and effect have an outsized importance for older consumers. 64% of consumers 55 and older name one of these as the most important, compared to 55% of 35-54-year-olds and 52% of 18-34-year-olds.

Among men, the most important attribute to know about a product is its THC potency; for women it is the effect.



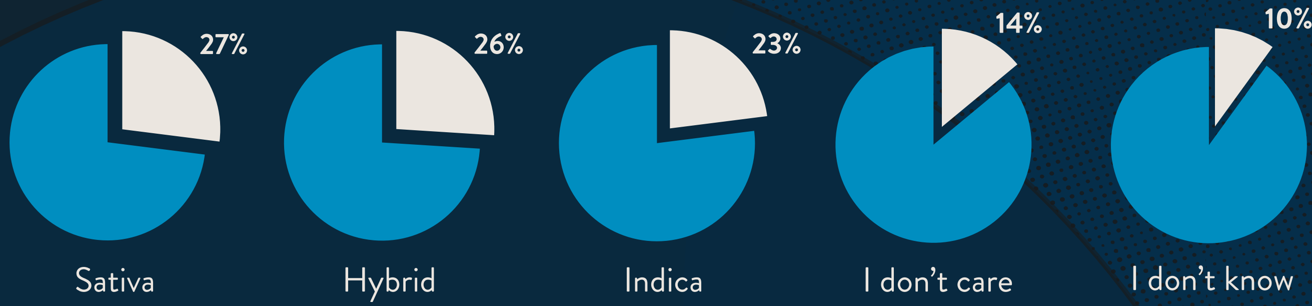
## STRAINS VS. MINOR CANNABINOIDS & TERPENES

Despite recently increased industry focus on minor cannabinoids and terpenes, most consumers still use strains to make decisions.

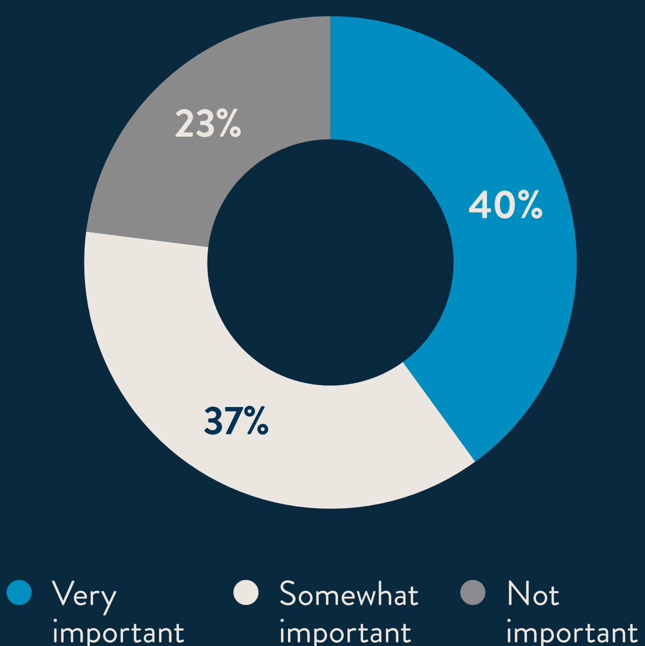
**77%** of flower consumers say strains are important.

**47%** say minor cannabinoid and terpene profile is important.

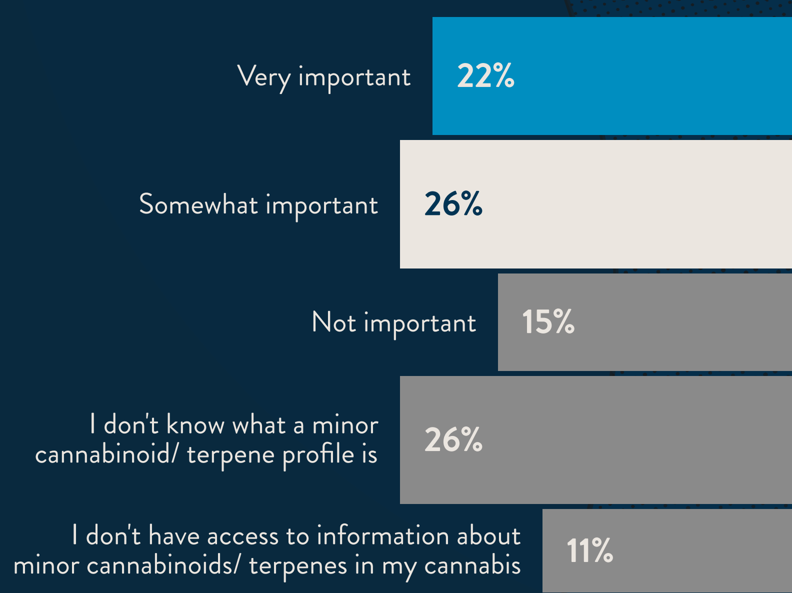
### What type of cannabis do you prefer?




### How important are strains to you?



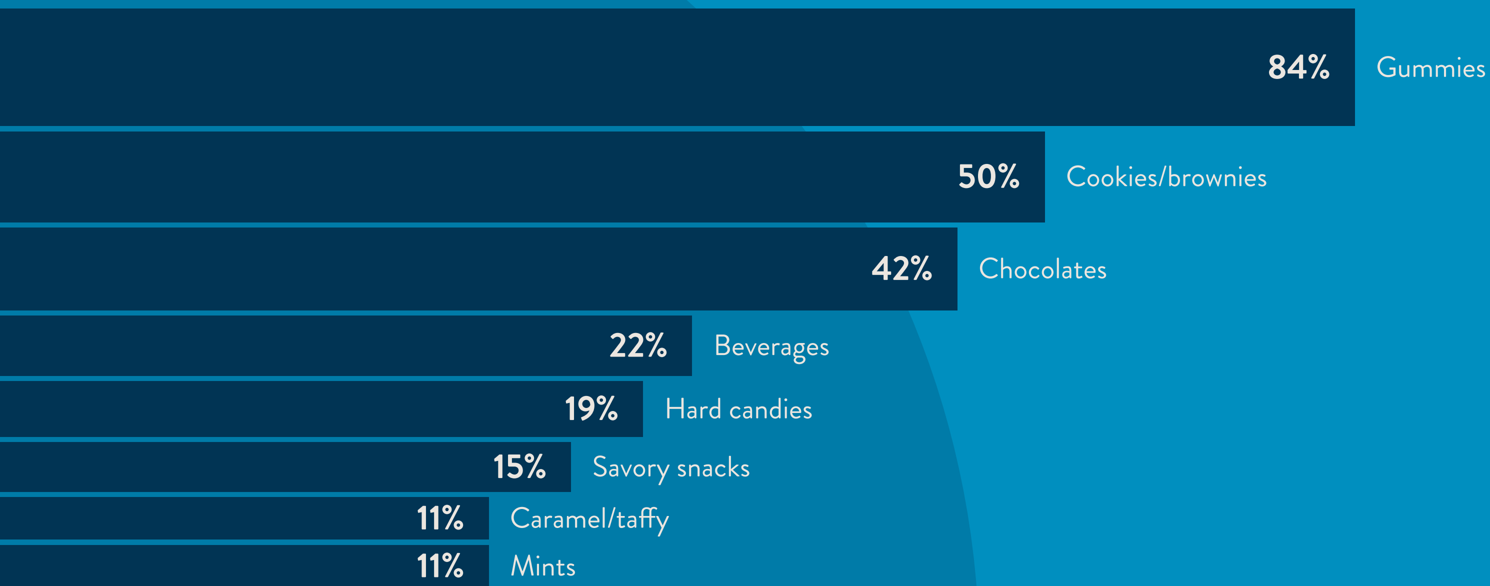

### Importance of Minor Cannabinoid/Terpene Profile




*All charts this page: Among current (annual+) consumers who use smokable forms of cannabis.*

## Most Commonly Used Edible Type

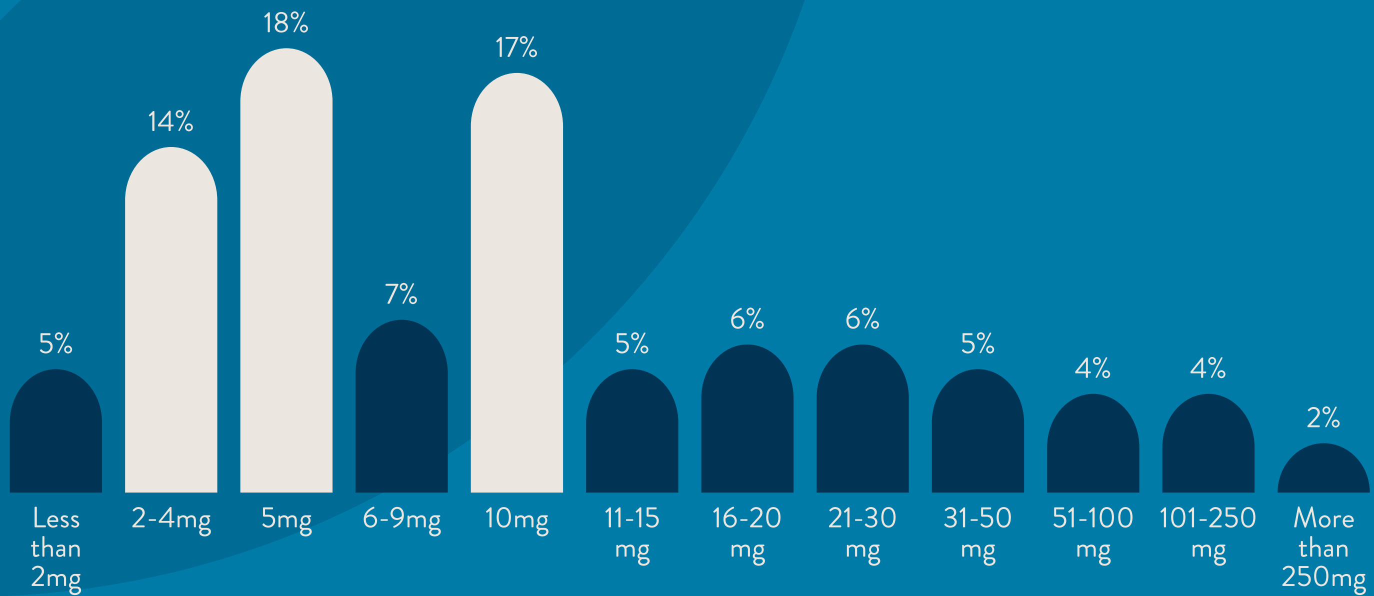
*Among current (annual+) consumers who use edibles.*




## THC Dose per Session in Edibles/Beverages

*Among current (annual+) consumers who use edibles/beverages and typically know how many milligrams of THC they consume at a time*

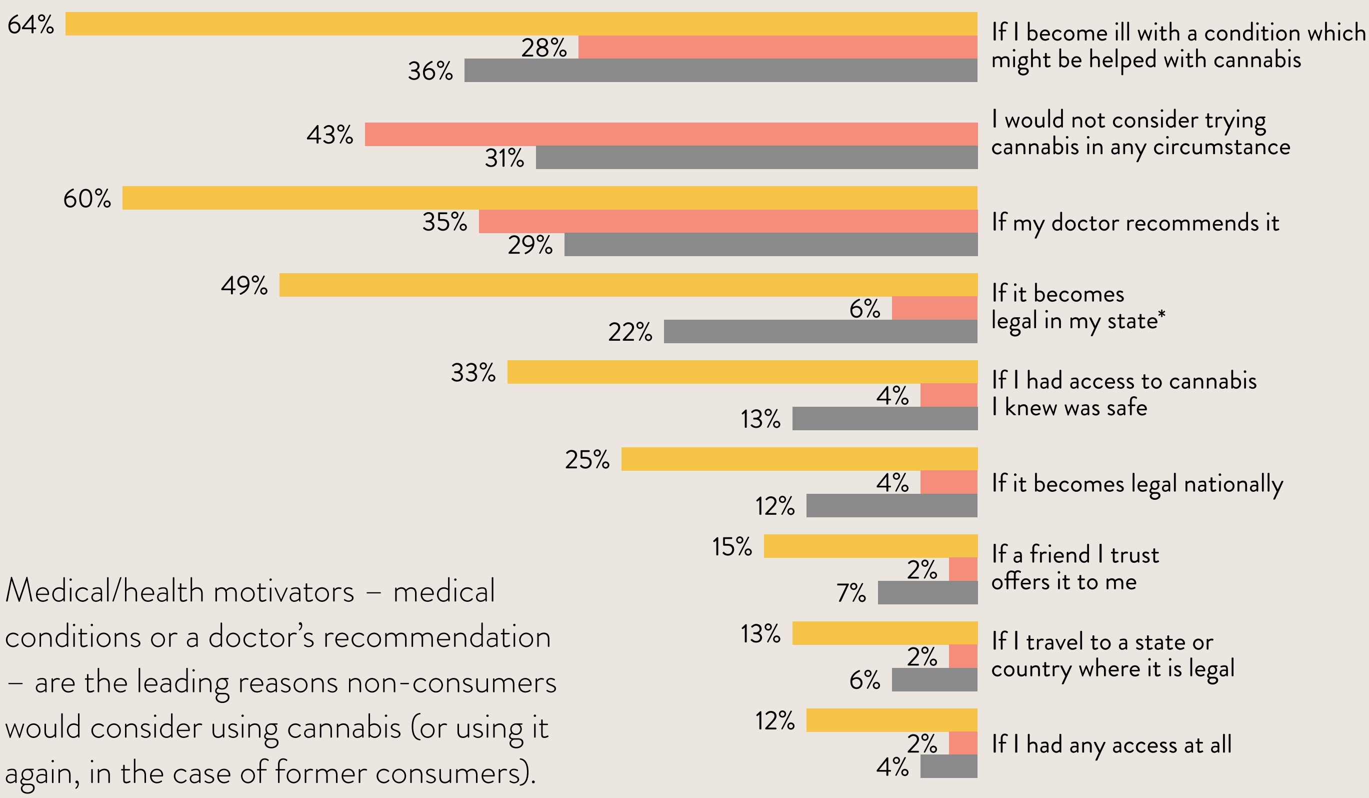
The most common doses for manufactured edibles and drinks are 2mg, 5mg, and 10mg, which accounts for the relative popularity of these doses per session.



# Non-consumers & Potential Use

## Circumstances When Non-consumers Would Consider Using Cannabis

*Among respondents who do not use cannabis.*
**Among respondents in medical-only or illicit states*

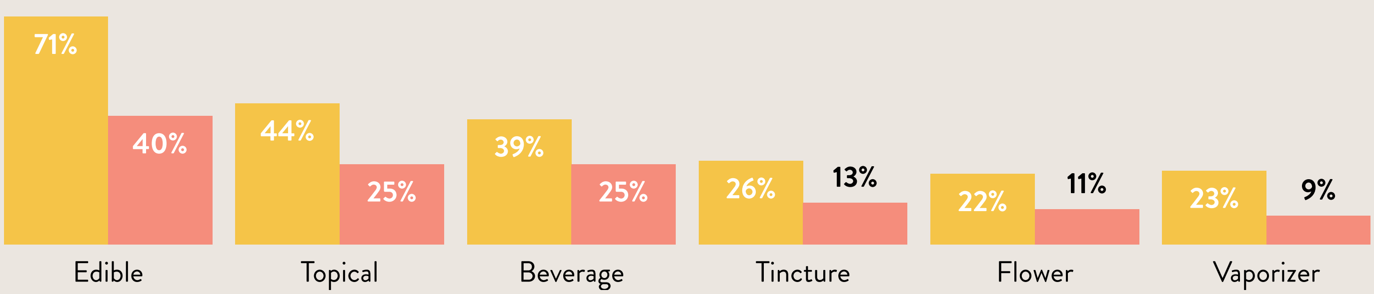



Medical/health motivators – medical conditions or a doctor's recommendation – are the leading reasons non-consumers would consider using cannabis (or using it again, in the case of former consumers).

Potential (never used, but would consider)
Never Used (don't intend to)
Former (used before, will not again)

## Potential Forms of Interest to Non-consumers

While smokable products are the most commonly used forms of cannabis among consumers, ingestible and topical forms are most appealing to non-consumers.

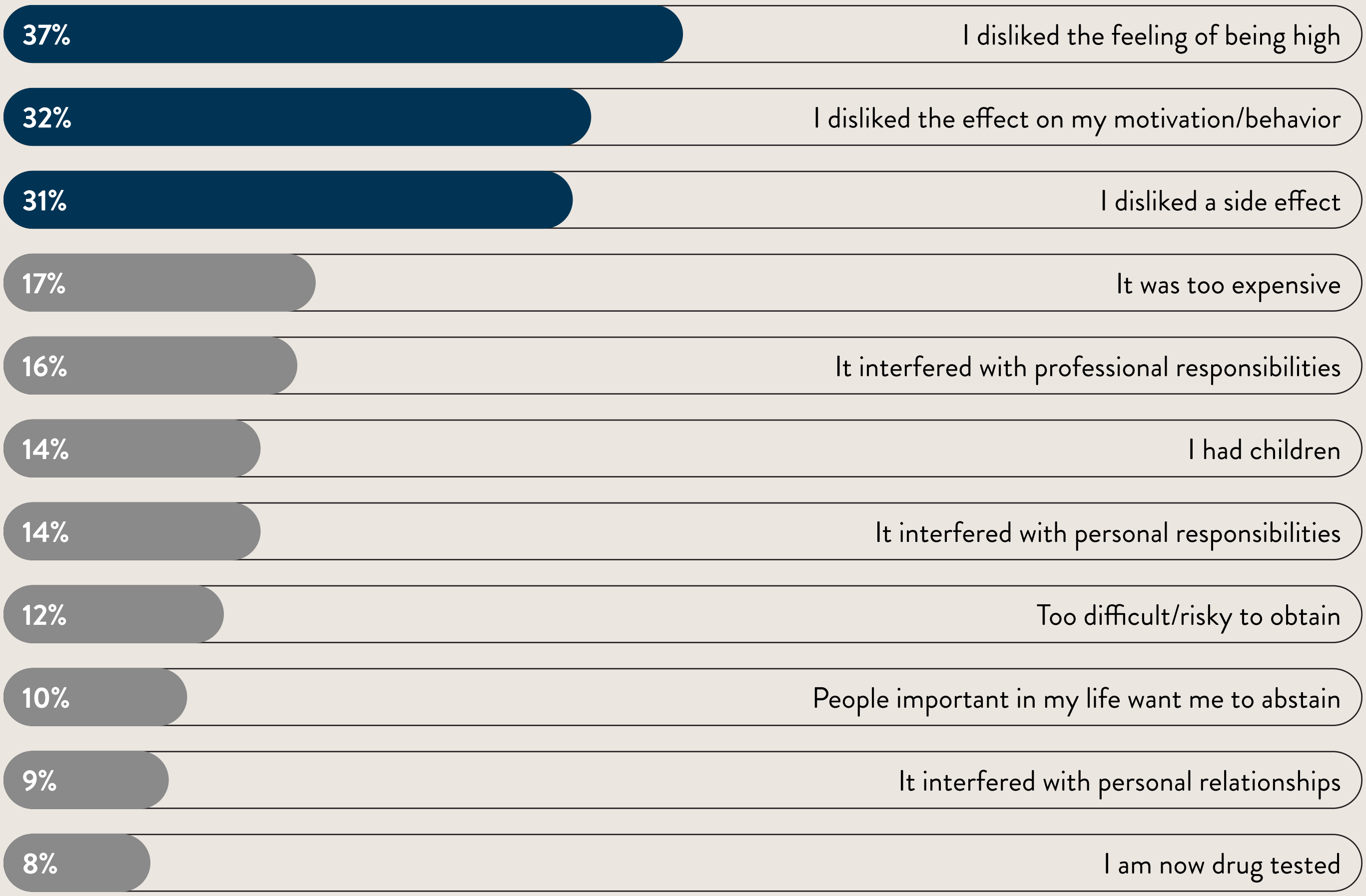



*Among respondents who have never used cannabis.*

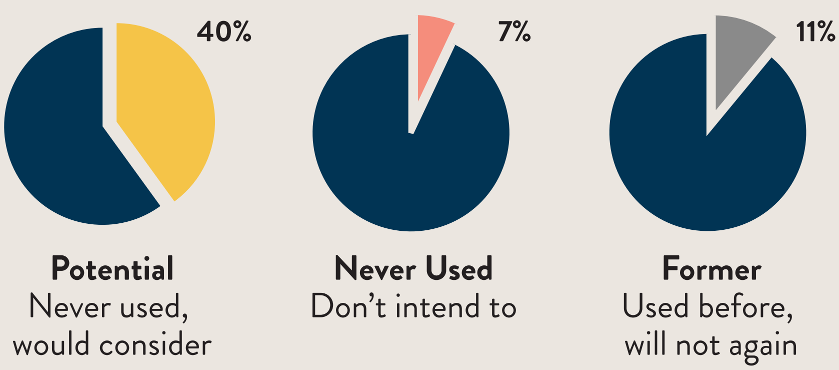
## **Former Consumers:** Reasons for Stopping

*Among respondents who used cannabis in the past but do not intend to use again.*

The leading reasons former consumers stopped using cannabis relate to the effects of cannabis use.




## Non-consumers Likely to Use Cannabis in the Next 6 Months




*Among respondents who do not use cannabis.*

**16%**

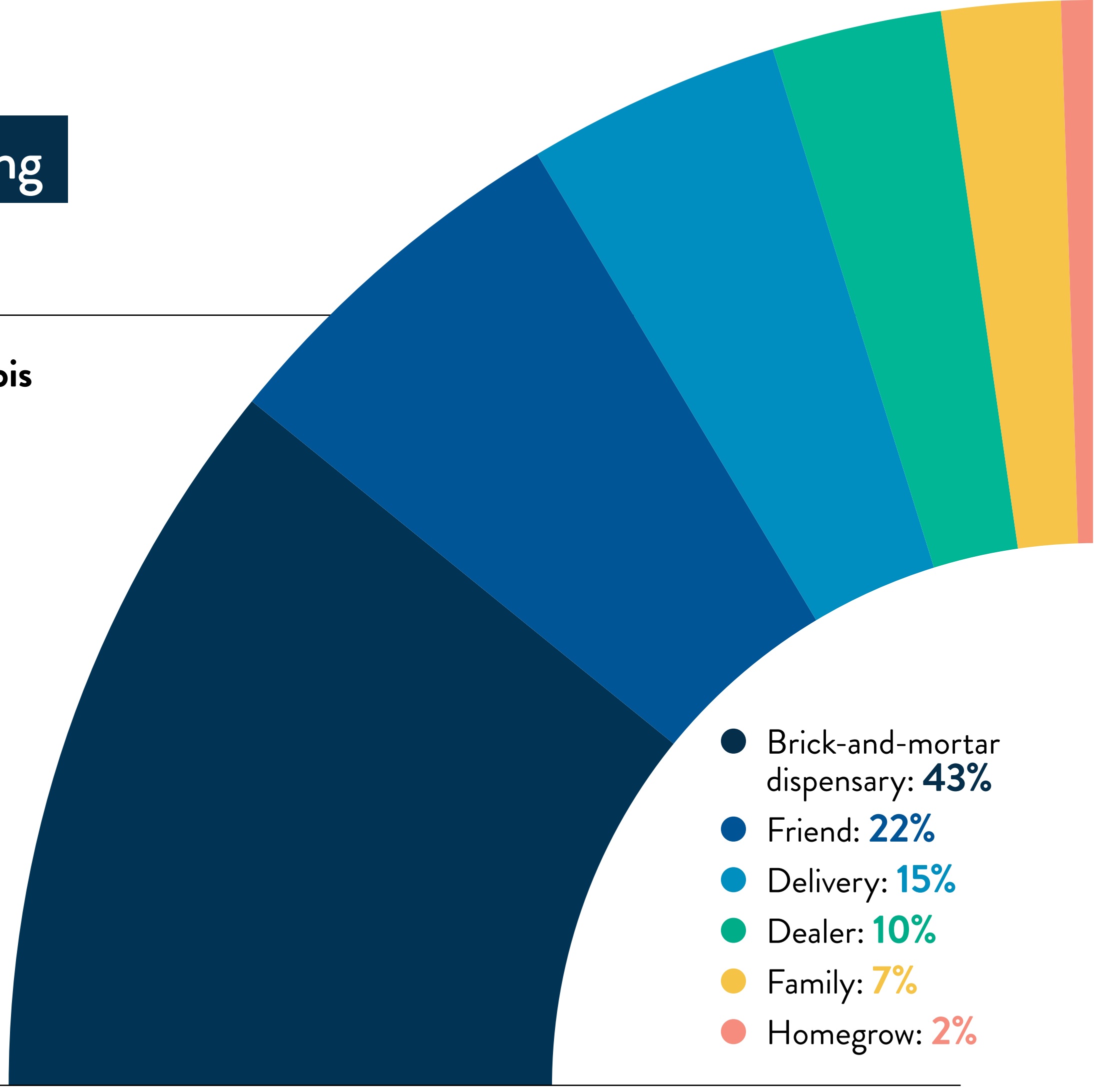
of all non-consumers say they are likely to use cannabis in the next 6 months.

# Sourcing & Spending

## Primary Source of Cannabis

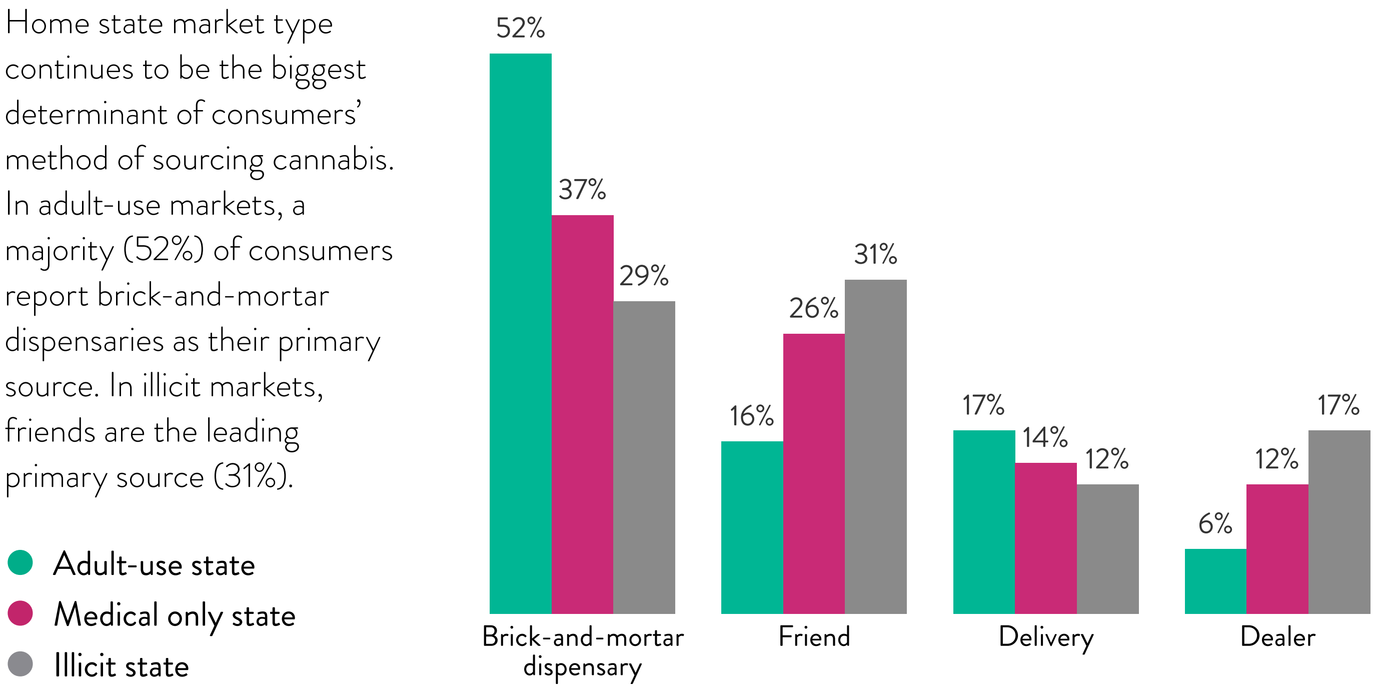
More than 2 in 5 U.S. consumers say a brick-and-mortar dispensary is their primary source for cannabis. Friends are the next leading source, followed by delivery services.

This pattern does not vary significantly between different ages and genders.

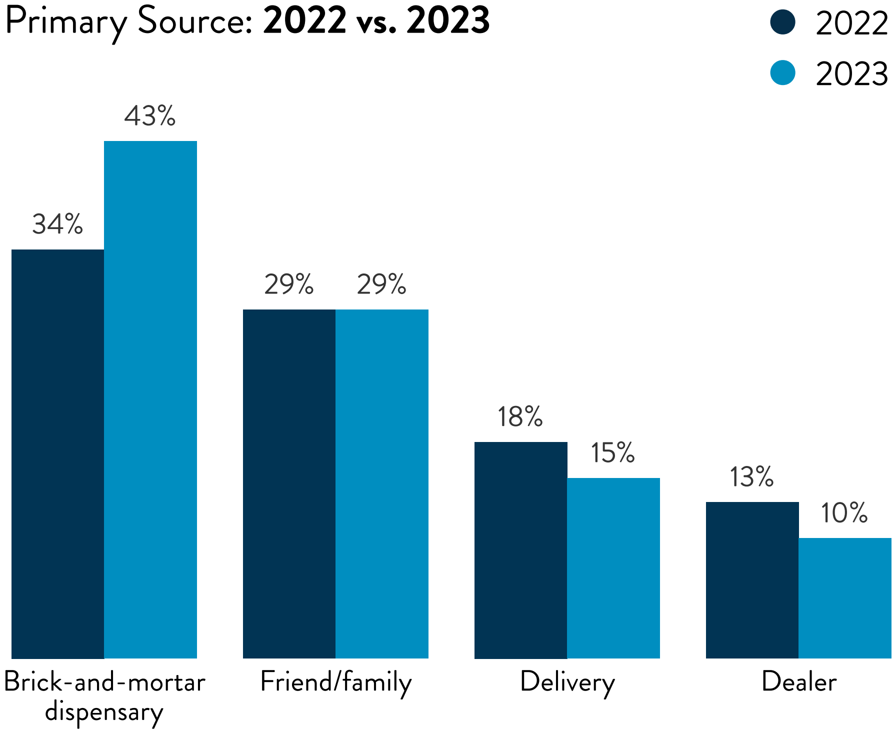



## Primary Source: **By Home State Market**

Home state market type continues to be the biggest determinant of consumers' method of sourcing cannabis. In adult-use markets, a majority (52%) of consumers report brick-and-mortar dispensaries as their primary source. In illicit markets, friends are the leading primary source (31%).



## Primary Source: **2022 vs. 2023**




In the last year, the share of consumers who source primarily from brick-and-mortar dispensaries has increased significantly, from 34% to 43%. It is expected that this share will continue to grow over the next few years as more states legalize and markets become operational.

Despite the dramatic growth in use of brick-and-mortar dispensaries, friends and family continue to be a prevalent source.

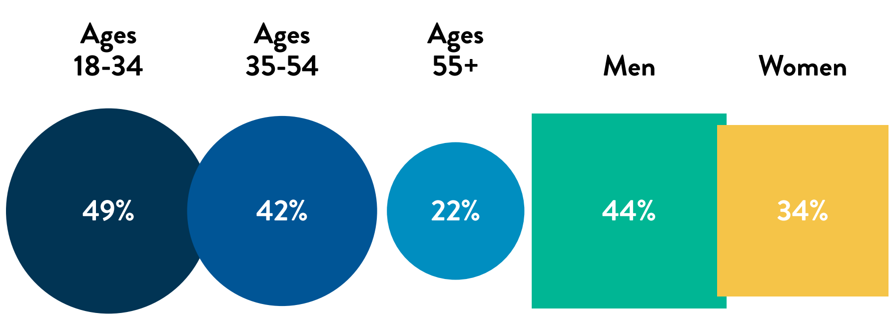
**23%**

of consumers acquire cannabis from a friend or family member and consume with that person.

**31%**

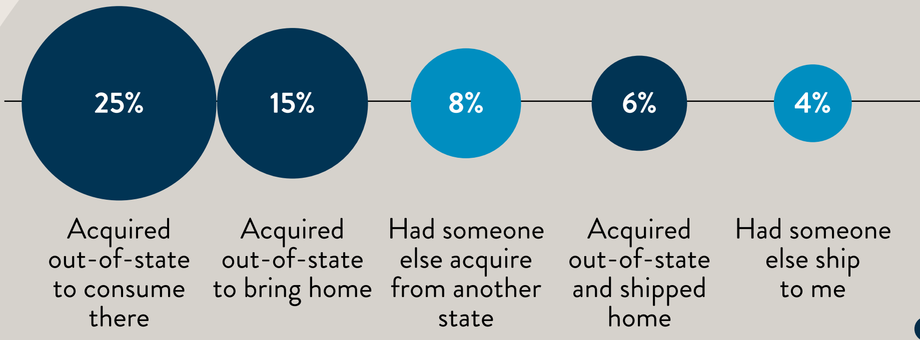
of consumers acquire cannabis from a friend or family member to consume at a later time.

Ever supply family or friends with cannabis.




**39% of current consumers report supplying cannabis for their family or friends, including nearly half (49%) of consumers under age 35.**

## OUT-OF-STATE SOURCING



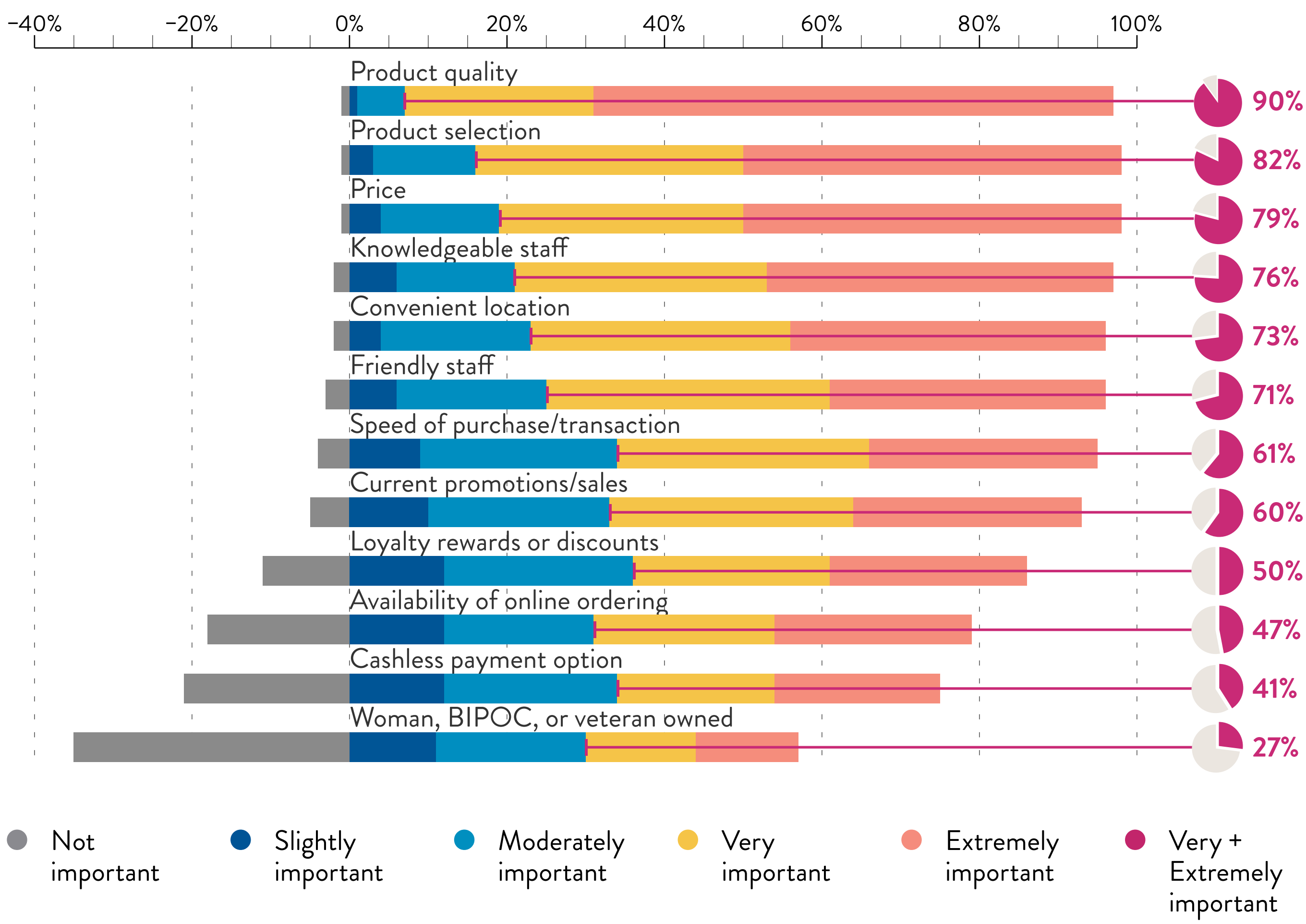

**42%** of consumers have sourced cannabis from out of state.

- Acquired themselves
- Had someone else acquire

## BUSINESS SOURCING DECISIONS

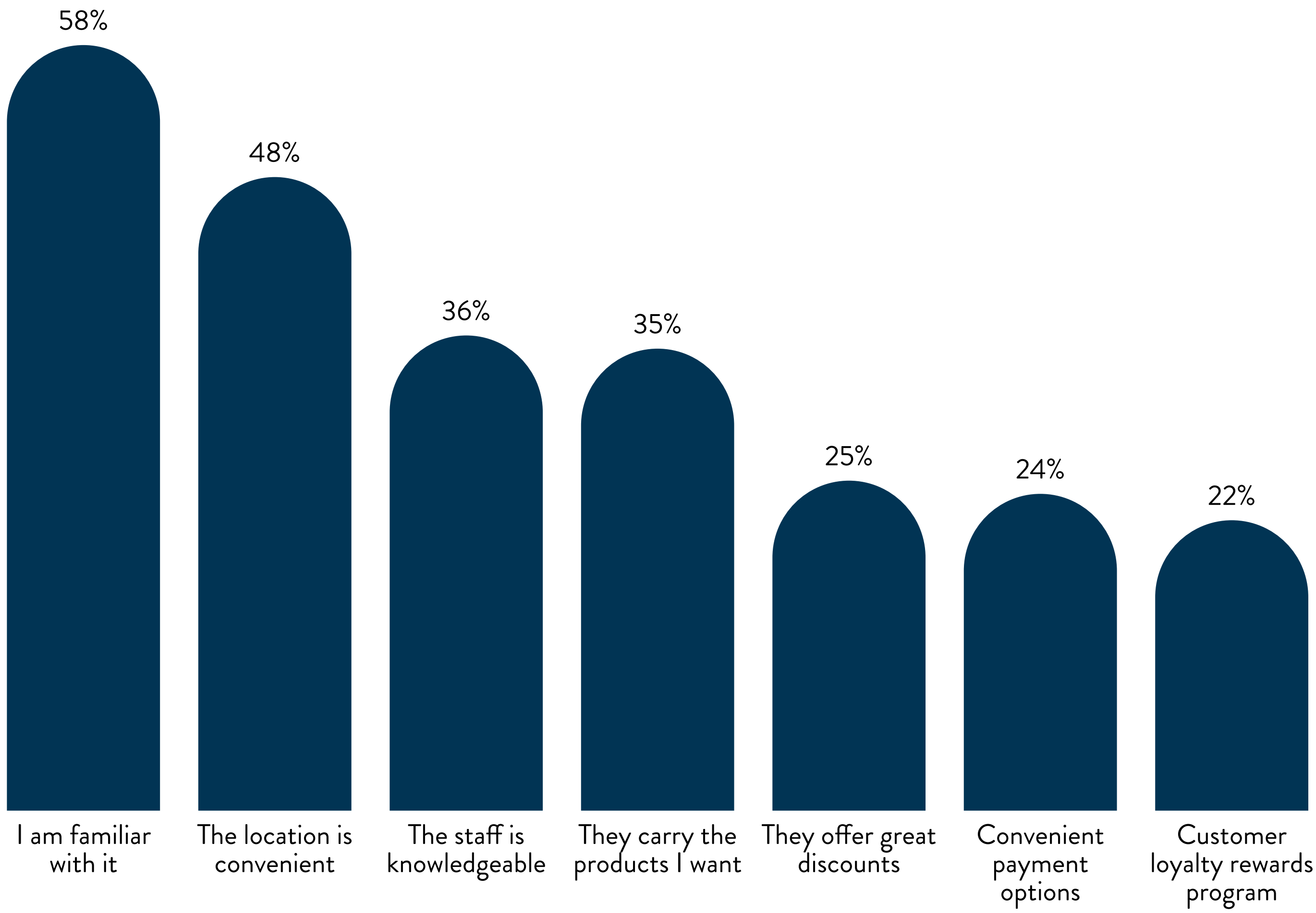
### Source Decision Factors

*Among current (annual+) consumers who source cannabis from a business (brick & mortar or delivery service).*



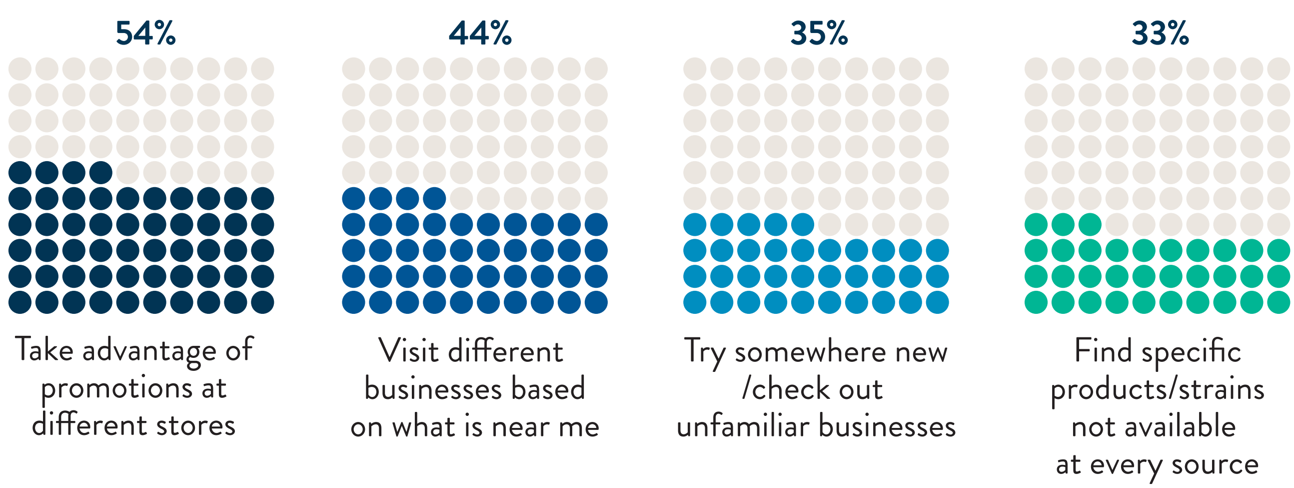
## Business Loyalty Reasons

*Among consumers who always or usually source from the same cannabis business.*




## Business Switching Reasons

*Among consumers who source from different cannabis businesses.*

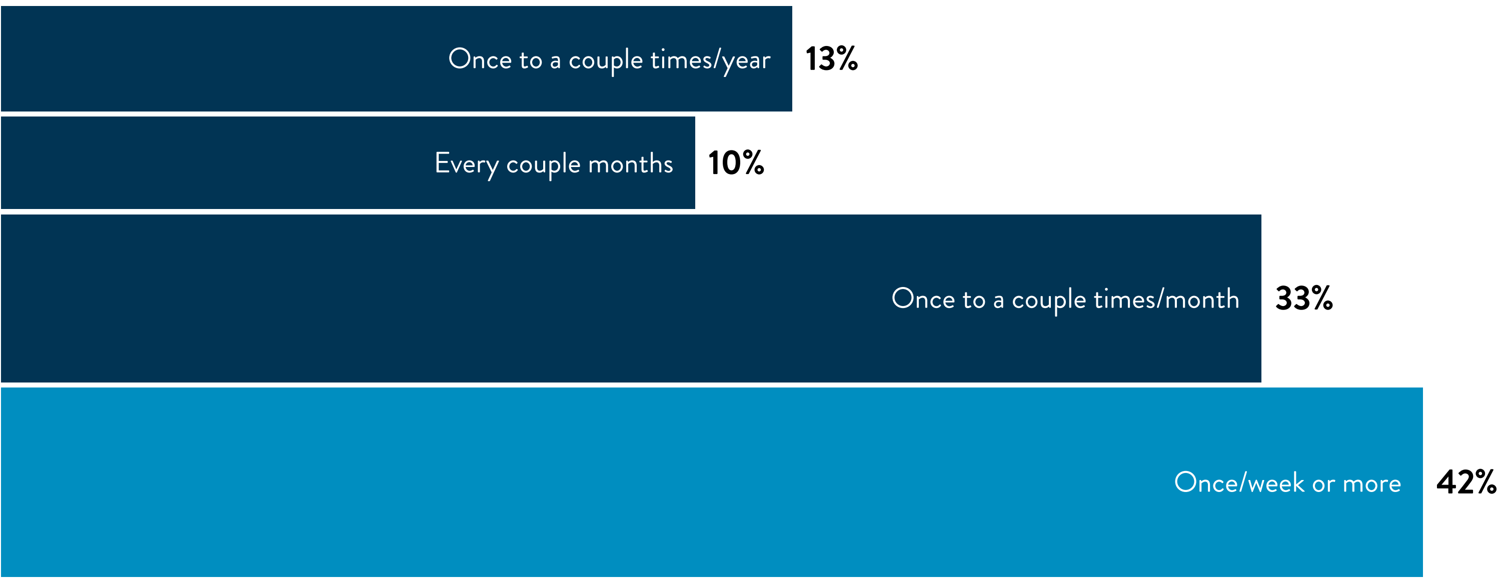


## ACQUISITION FREQUENCY

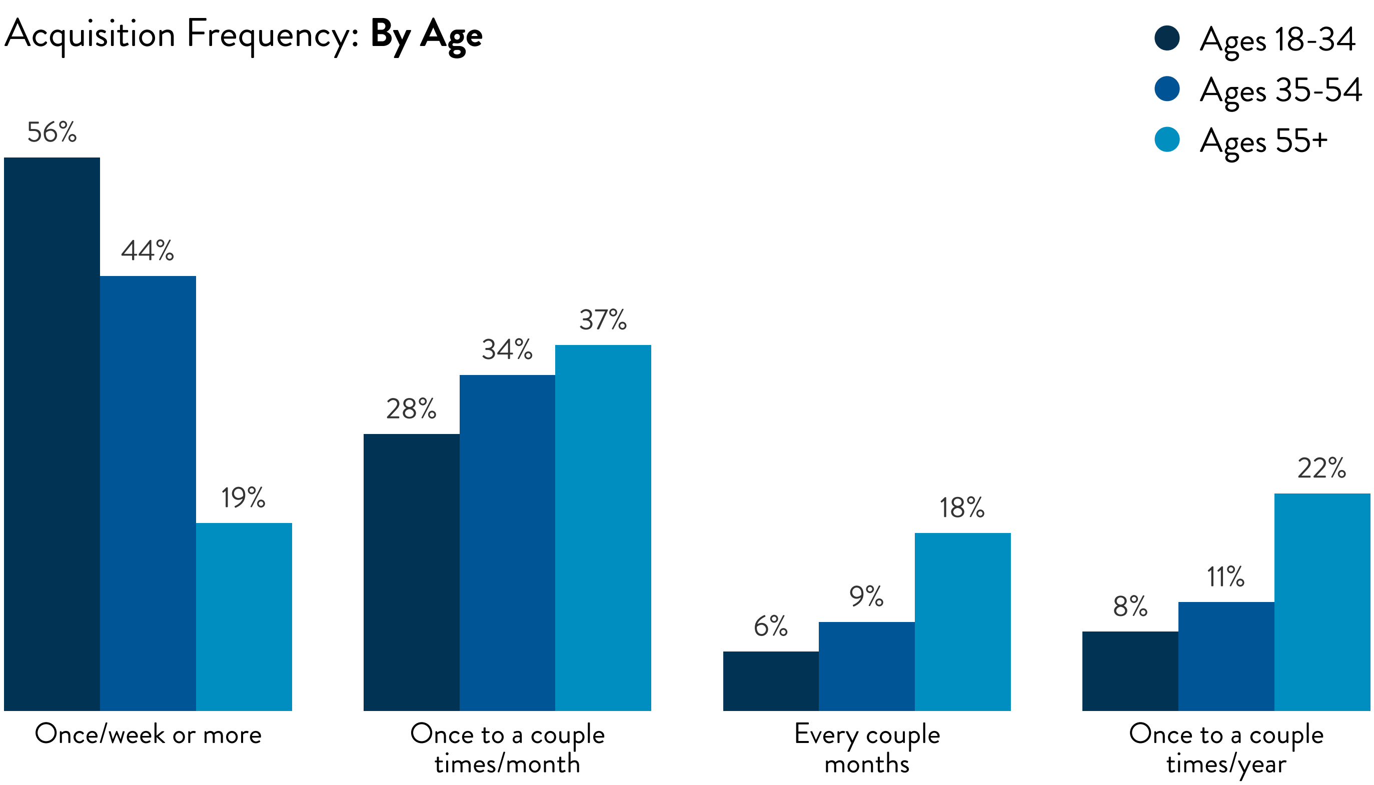
Two in five current consumers acquire cannabis at least once per week. Younger consumers are more likely than older consumers to acquire at least weekly.

**42%**

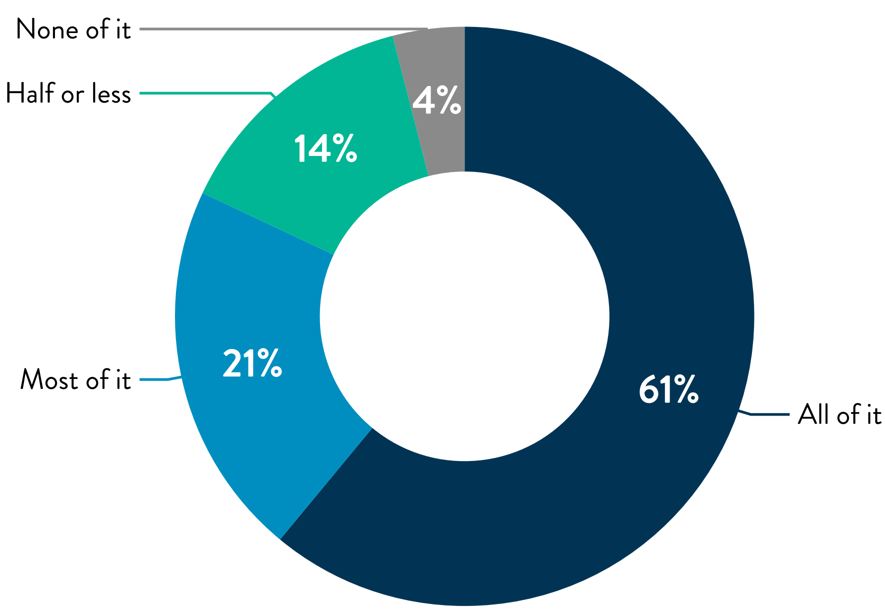
of current consumers acquire cannabis at least once a week.




Acquisition Frequency: **By Age**



### How much of the cannabis you consume do you pay for?

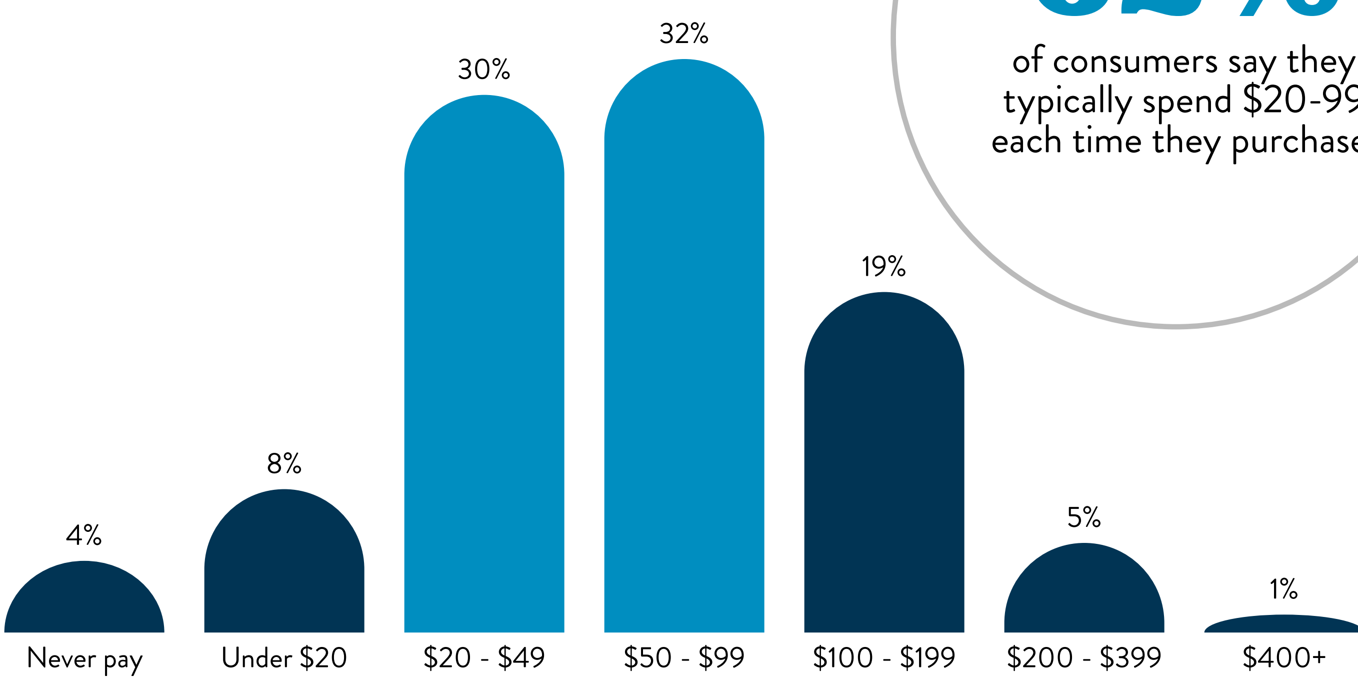



# 82%

of consumers pay for most or all of the cannabis they consume.

**Only 4% say they never pay for cannabis.**

### Typical Spend per Purchase



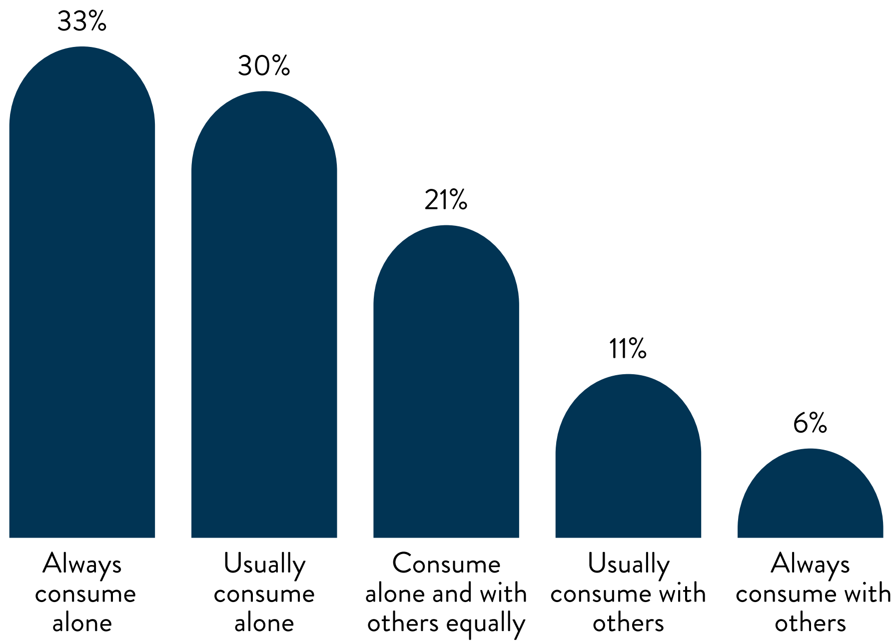

# 62%

of consumers say they typically spend $20-99 each time they purchase.

# Social Factors & Use

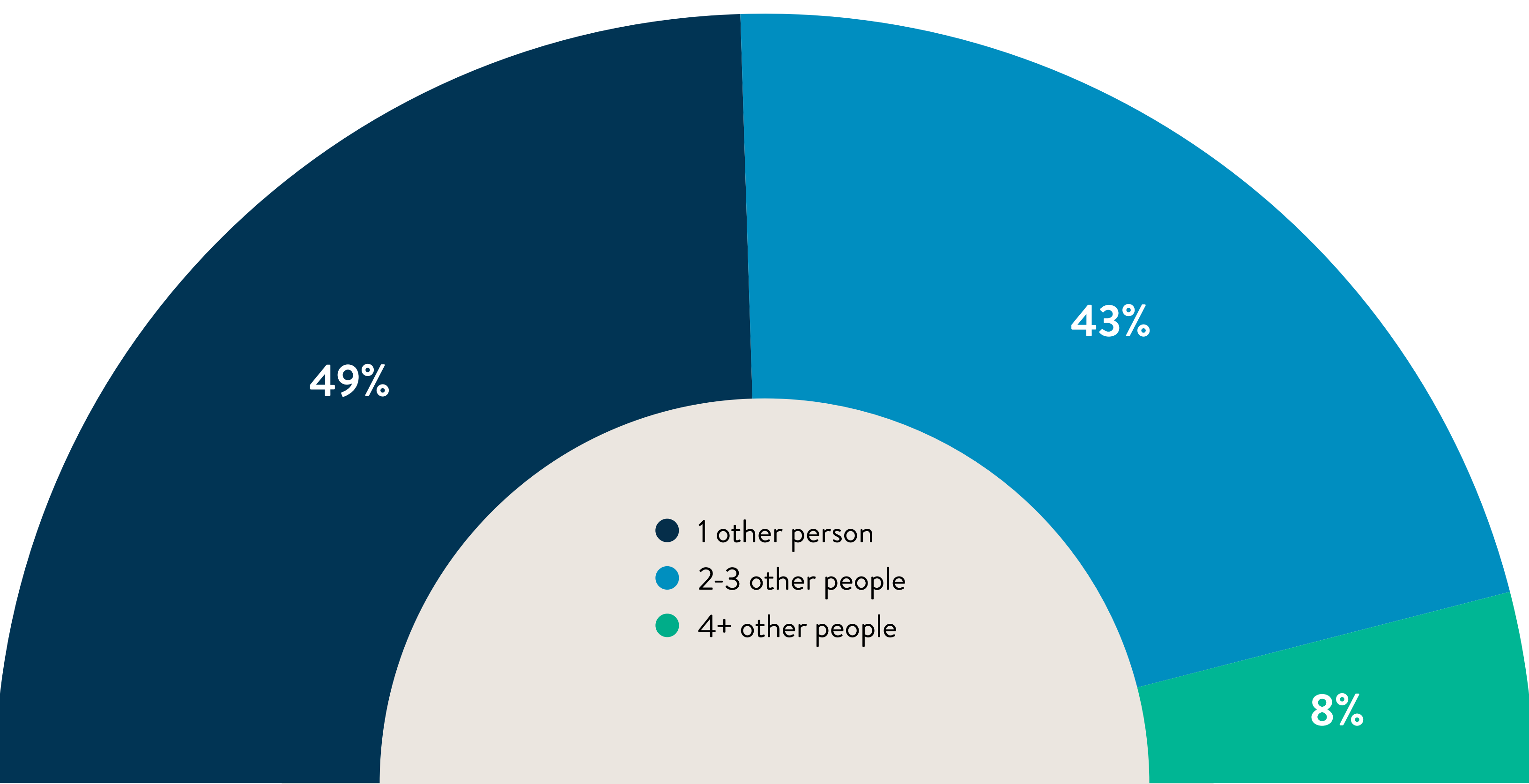
## Use Context

Most current consumers (63%) report always or usually consuming cannabis alone. Of the 17% who always or usually consume with others, about half typically use with just one other person.



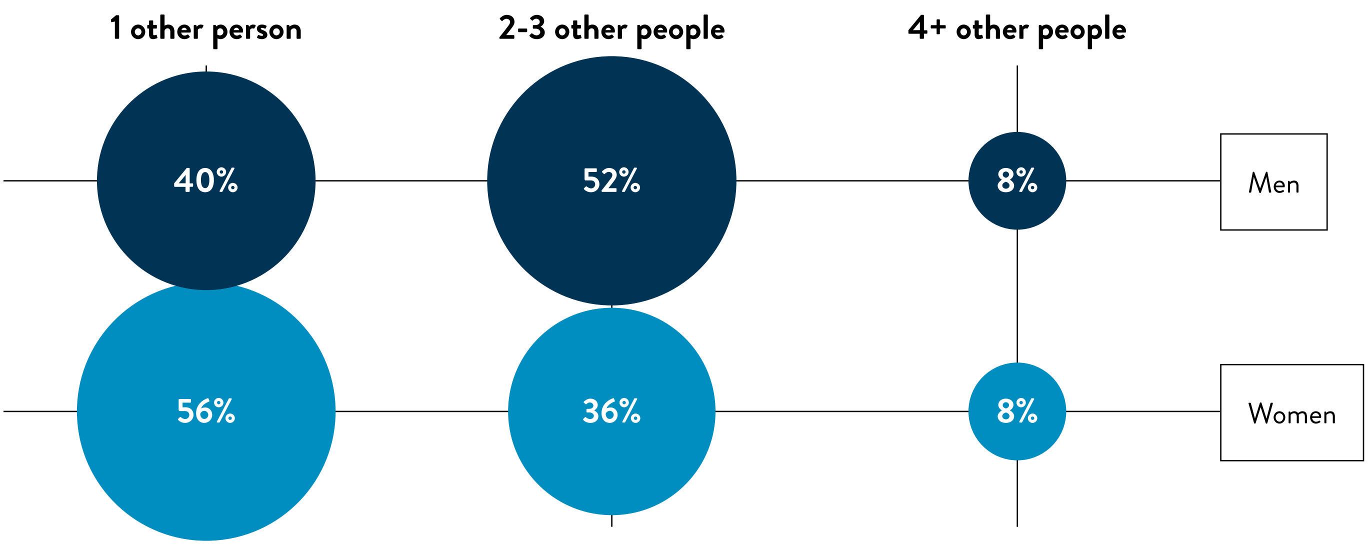

## If you consume with others, how many people are you typically with?

*Among current (annual+) consumers who always or usually consume with others.*



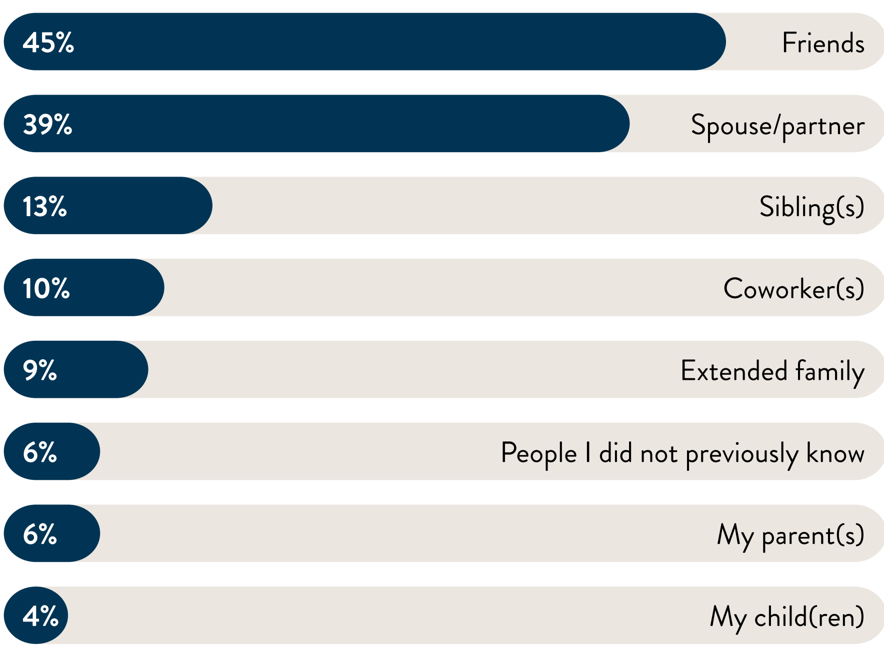
## If you consume with others, how many people are you typically with: **By Gender**

Among consumers who typically use cannabis with others, women are more likely to consume with just one other person, whereas men are more likely to consume with 2-3 others.




*Among current (annual+) consumers who always or usually consume with others.*

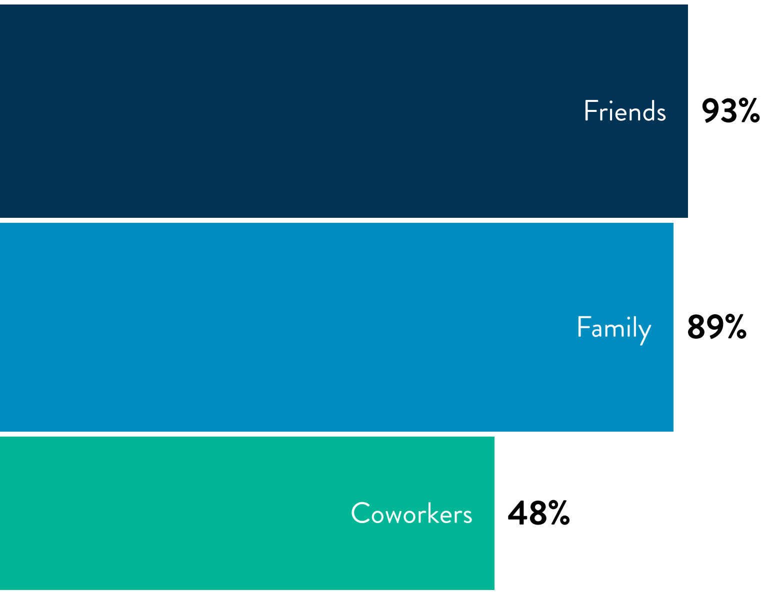
## With whom have you consumed cannabis in the last year?




**26%**

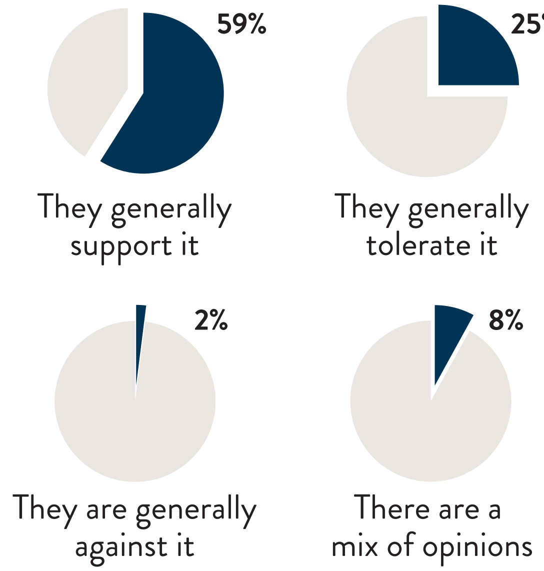
of consumers say cannabis is sometimes a part of holiday gatherings/ celebrations with family.

## Who knows you consume cannabis?



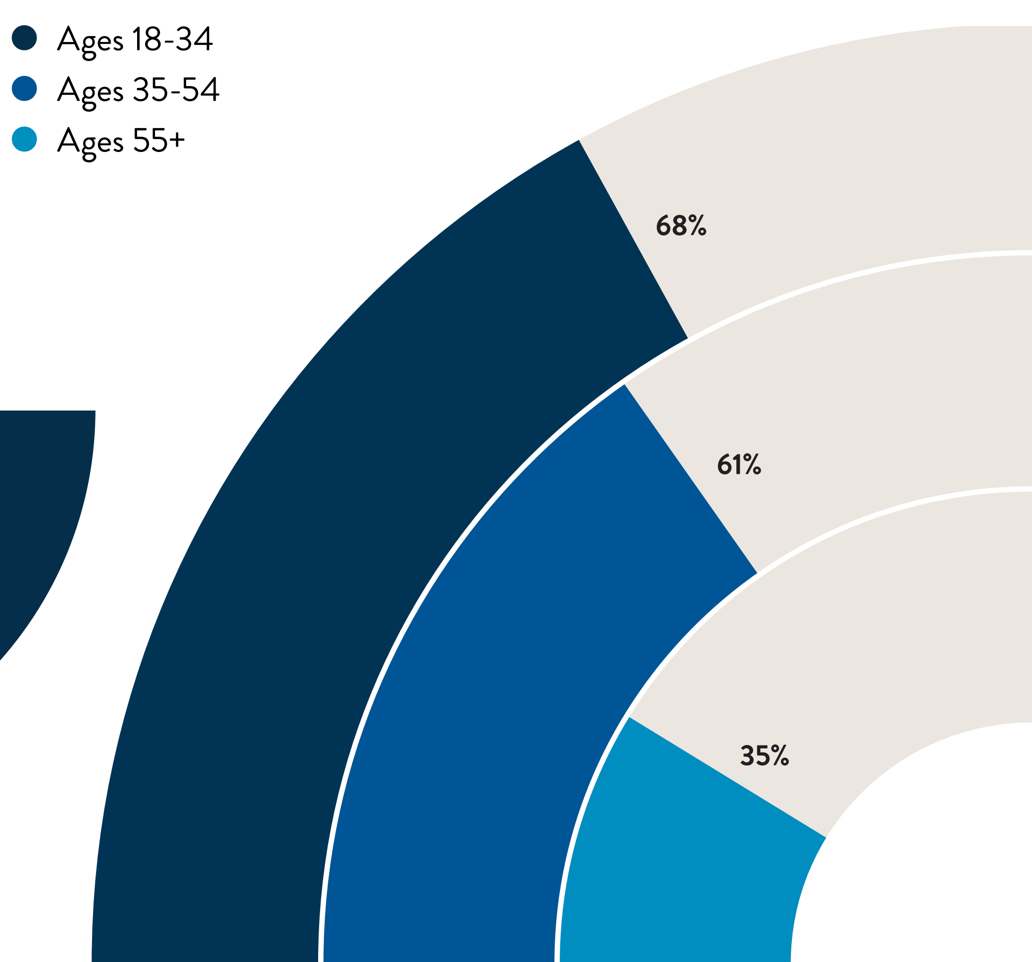

## How do your friends/ family feel about your cannabis use?

*Among current (annual+) consumers who have friends or family that know about their cannabis use.*




Nearly 3 in 5 consumers report that most of their friends are also cannabis users. Among consumers under 35 years old, it is two thirds. Likelihood of friends also being cannabis consumers did not differ significantly by gender or home state market type.

Most of my friends are cannabis consumers: **By Age**

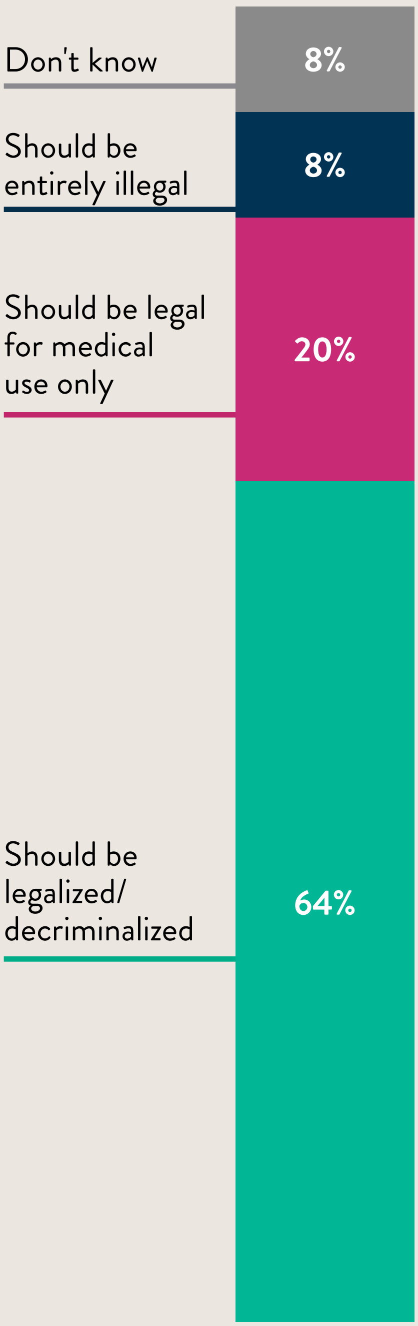



**57%**

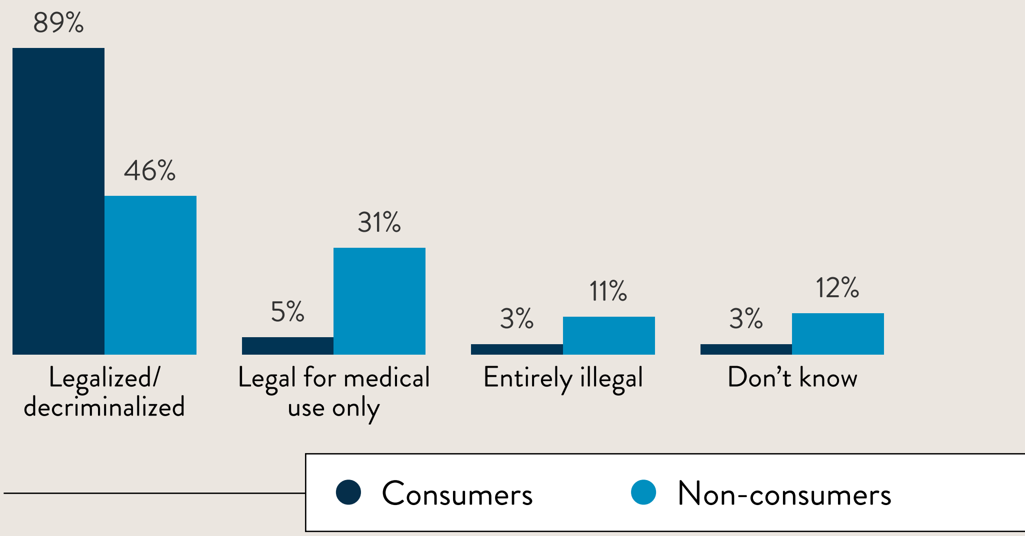
of current consumers say most of their friends are cannabis consumers.

# Policy Beliefs

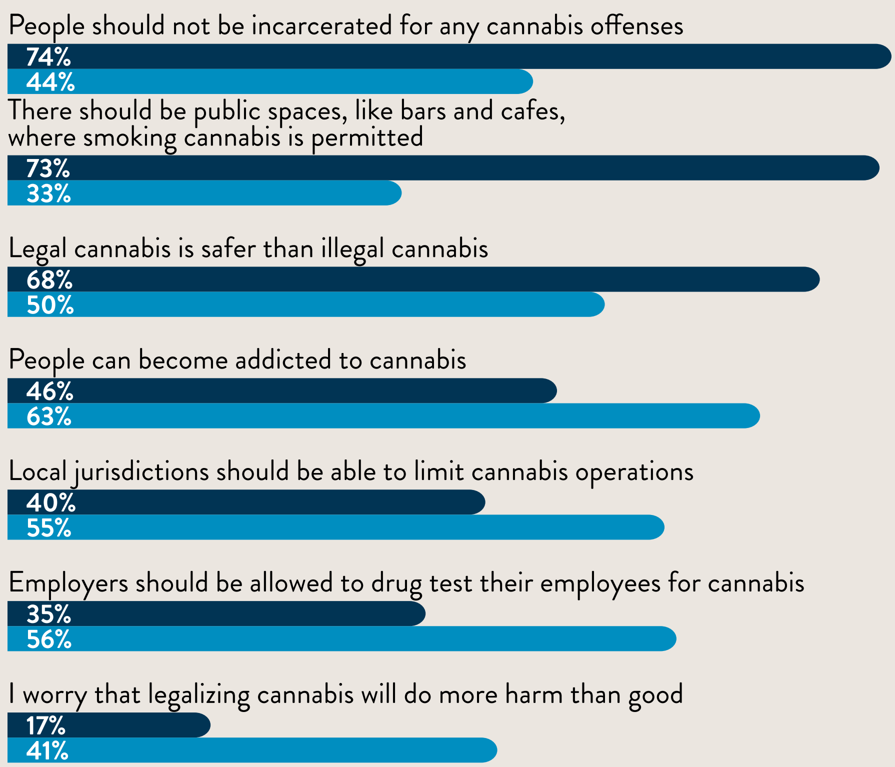
**General Population:** Which best describes your views on cannabis legalization?




Which best describes your views on cannabis legalization: **Consumers vs. Non-consumers**




Policy Beliefs: **Consumers vs. Non-consumers**

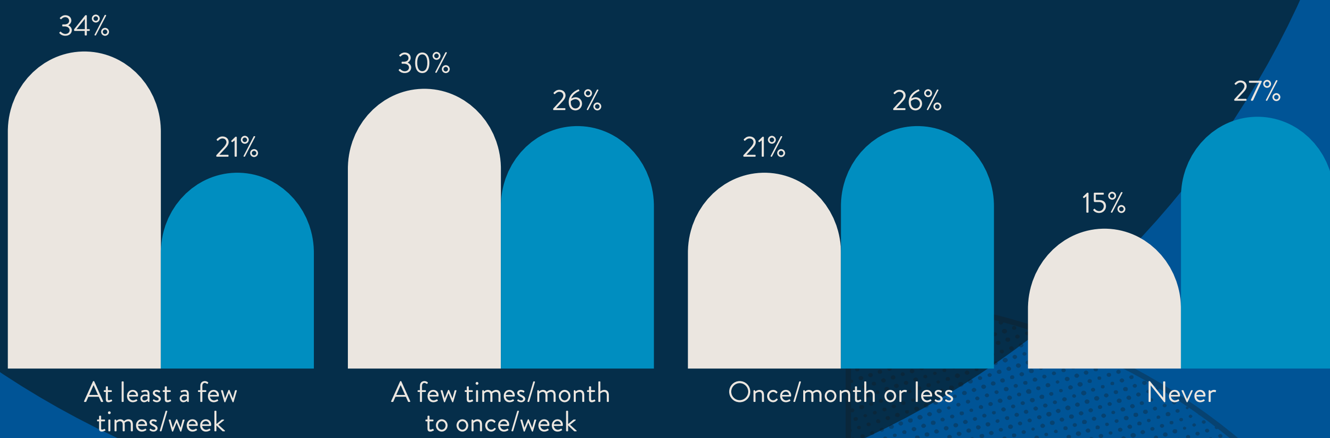


# Other Consumption

## ALCOHOL

**Frequency of Alcohol Use:** Consumers vs. Non-consumers

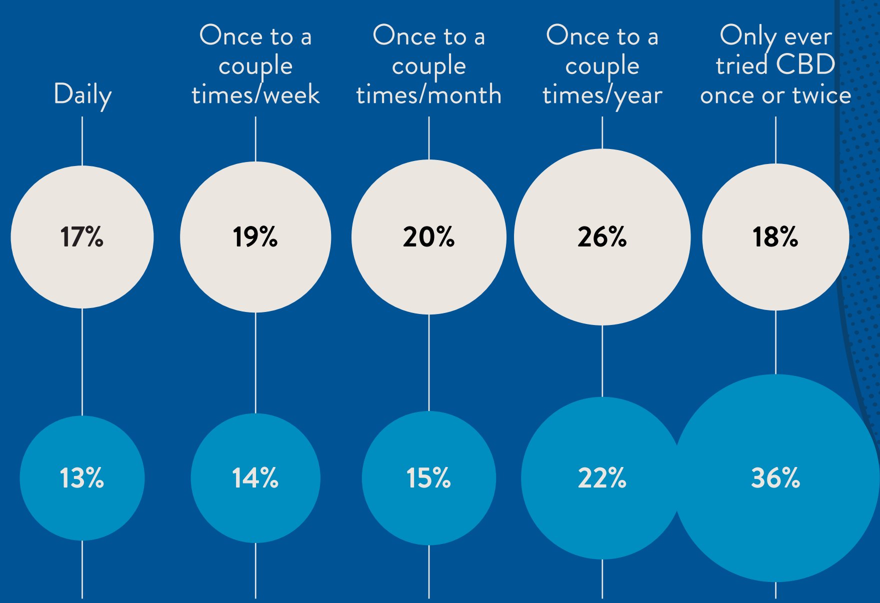
Cannabis consumers are more likely than non-consumers to also consume alcohol, and generally use it more frequently.




## CBD

Consumers
Non-consumers

**Frequency of CBD Use:**
Consumers vs. Non-consumers



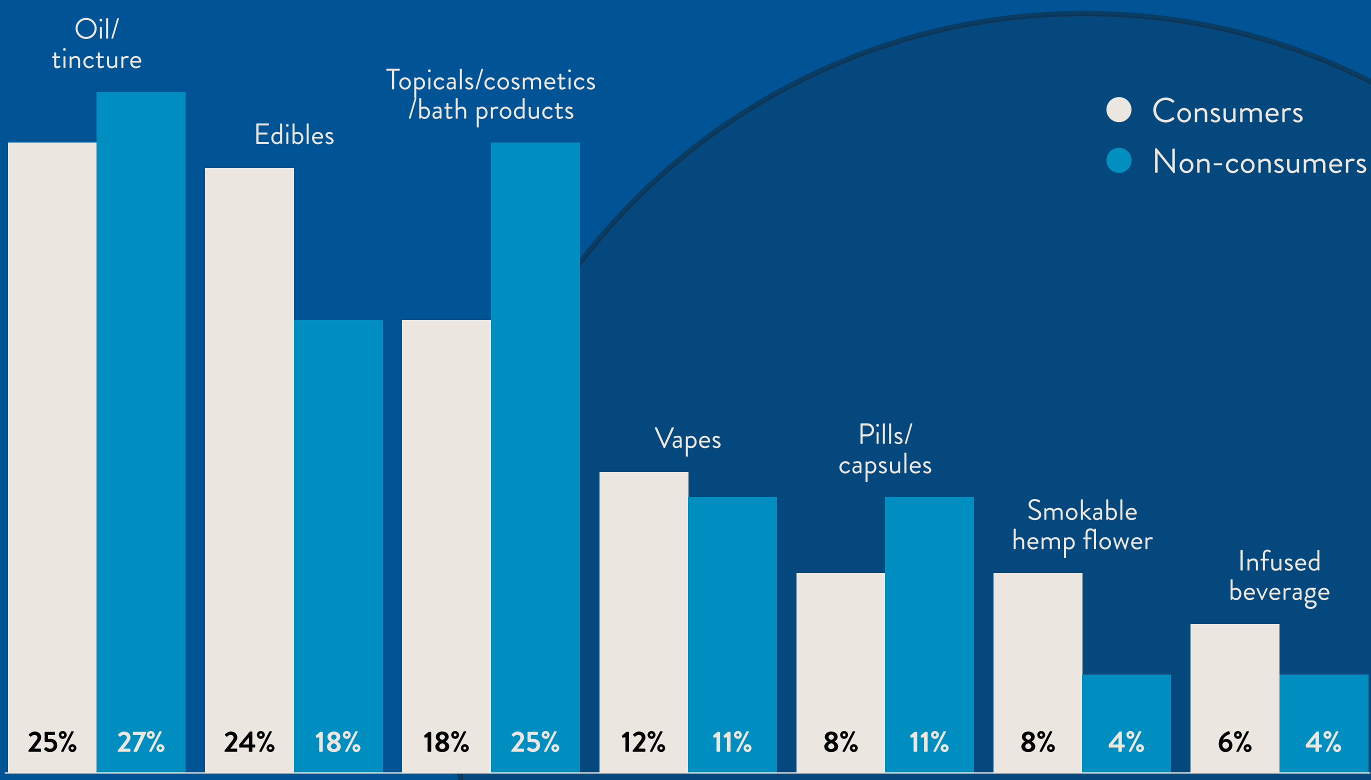

*Among respondents who have ever tried CBD.*

**54%**
of cannabis consumers have tried CBD.

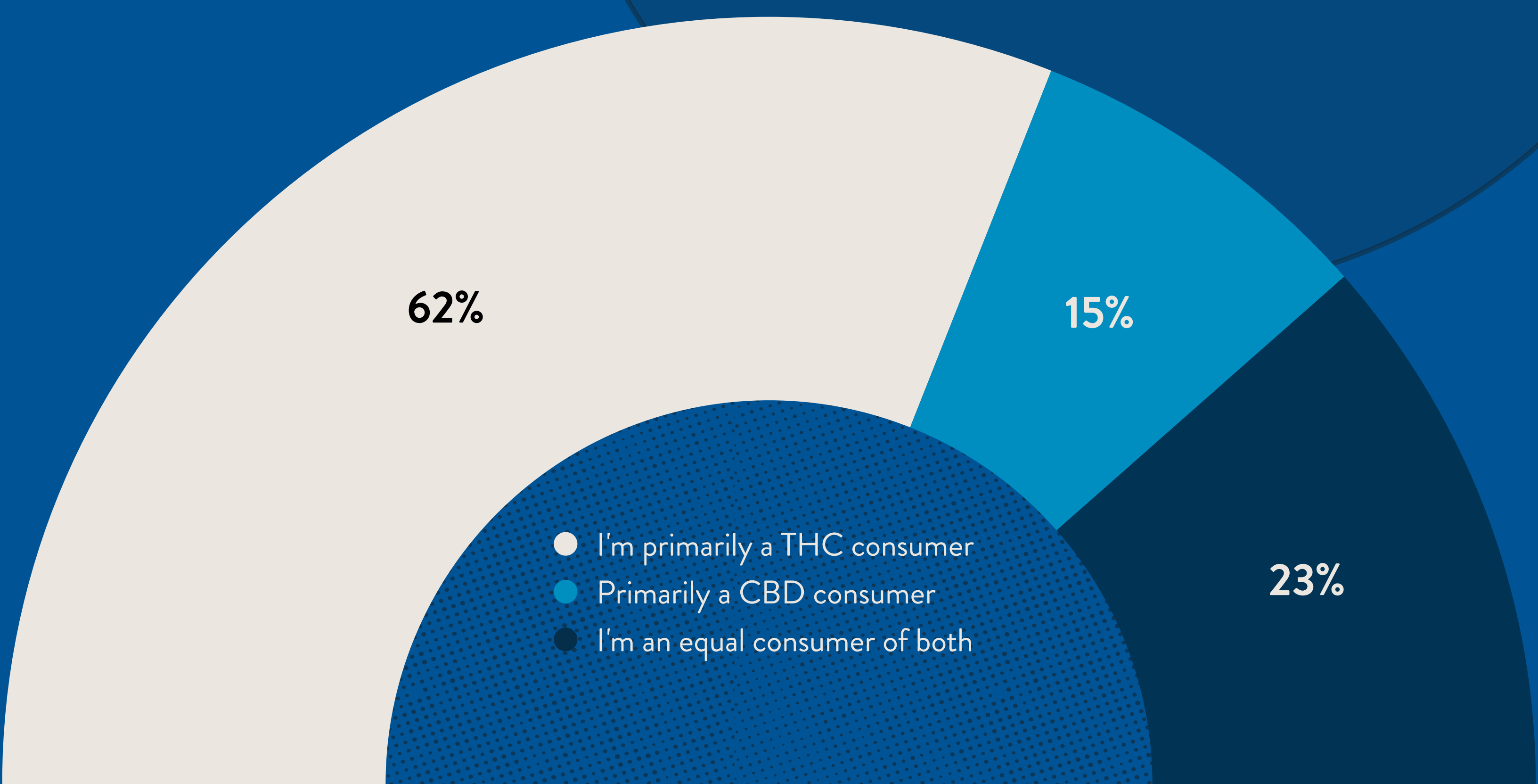
**16%**
of non-consumers have tried CBD.

## **Most Frequently Used CBD Form:** Consumers vs. Non-consumers

*Among respondents who have used CBD more than once or twice.*




**Among consumers of both CBD and THC, most consider themselves primarily THC users.**



# Key Takeaways

**As legalization of cannabis expands, acceptance and use continue to grow among Americans.** With 42% of U.S. adults having used cannabis and likely to use it again, and 15% expressing interest in trying it in the future, the industry can expect a steady increase in consumer base. As the number of adults who have not tried cannabis and do not intend to decreases, this trend signifies growing receptiveness and potential opportunities for market expansion.

**Cannabis prohibition does not materially affect the frequency with which consumers use cannabis.** Use frequency patterns among consumers vary by widely by age and somewhat by gender, but not by the cannabis laws of consumer's home state. Use frequency distribution across adult-use, medical only, and illicit states is constant. Regulators, legislators, and policymakers should not expect to be able to affect the frequency with which consumers use cannabis.

**The cannabis consumer demographic is diverse, with users spread across age groups, genders, economic brackets, and political affiliations.** Instead of trying to speak to the whole range of consumer identities at once, brands and retailers should identify a specific target consumer type and cater to their specialized needs.

> **The cannabis consumer demographic is diverse... brands and retailers should identify a specific target consumer type and cater to their specialized needs.**

**A majority of cannabis consumers use the product for both medical and recreational purposes.** This underscores the need for product development that focuses on delivering specific effects, such as boosting energy or relieving pain, and understanding that one consumer may seek several distinct effects in different contexts. Brands should invest resources in understanding the constellation of desired effects among their target users to be able to deliver across many potential use cases.

**Unwinding, pain management, and aiding sleep have stabilized as the leading reasons consumers report using cannabis.** With consumers and non-consumers alike becoming increasingly comfortable openly discussing cannabis use, it is likely some individuals who do not currently use cannabis but experience problems their friends and loved ones commonly address with cannabis will be persuaded to try using cannabis to address pain, stress, or sleep disorders.

**Despite expanding legalization, many consumers still face limited access to cannabis.** Although 74% of Americans live in states with legal adult-use or medical markets, local regulatory restrictions and geographical distribution of dispensaries result in barriers to fully participating in the legal market for some, especially outside major metropolitan areas.

> **A majority of cannabis consumers use the product for both medical and recreational purposes.**

A majority of cannabis consumers use the product for both medical and recreational purposes.

**Access to forms of cannabis other than flower and edibles remains limited for many consumers, even in adult-use states.** As such, regulators should work to ensure that a wider variety of cannabis products are made available to consumers, and existing operators who have focused primarily on flower and edibles should expand their product offerings to reach new consumers, as well as providing existing consumers with additional product options.

**Which forms consumers use is limited by what they have access to.** Fewer than half of all consumers report having access to any forms of cannabis other than flower, prerolls, and edibles, even in adult use states. The shift toward non-flower products will continue slowly as access to and familiarity with these forms increases over the coming years.

**As legal markets expand and dispensaries diversify their product offerings, consumer interest in trying new cannabis products will grow in the short term.** This presents an opportunity for operators and investors to explore innovative product forms and delivery methods. In particular, younger consumers are more likely to be interested in new products and are more likely to use both flower and non-flower products, so focusing on this demographic could yield positive results.

**The increasing prevalence of brick-and-mortar dispensaries as the primary source of cannabis reflects the expansion of legal markets.** The share of sales captured by brick-and-mortar dispensaries will increase over the coming years as more states legalize and regulate cannabis and this channel becomes available to more consumers. The degree to which illicit dealers continue to prevail as a source within a state will depend on the cost of cannabis and the retail options created by that state's regulatory framework.

**Despite the growth in dispensary usage, friends and family continue to be a significant source of cannabis.** The use of informal sources such as friends and family will never entirely disappear, but the importance of this channel can be capitalized upon by brands and by leveraging referral programs and other initiatives to encourage word-of-mouth marketing.

**Younger consumers are not only shopping for themselves, but for older family members as well.** Half of current consumers ages 18-34 report supplying friends & family, and 10% of consumers ages 55 and older say family is their primary source of cannabis. This underscores the importance of educating younger consumers on products that would benefit their older relatives.

> **Younger consumers are more likely to be interested in new products and are more likely to use both flower and non-flower products.**

# Methodology

NEW FRONTIER DATA designed and conducted an online survey to assess cannabis consumer attitudes, perceptions, and consumption across legal and unregulated markets in the United States. Survey themes included: cannabis use, purchasing behavior and decision influencers, product preferences and expenditures, beliefs about cannabis, and other consumption behaviors. U.S. adults who were not cannabis consumers were also surveyed about potential future cannabis use, and beliefs and attitudes about cannabis, and social and personal connections to cannabis consumers.

Sampling was demographically representative of the adult population in the United States. Analyses were conducted among 4,358 cannabis consumers – respondents who indicated that they consumed cannabis in the past, and will consume it again, as well as 1,176 non-consumers. The survey was conducted in Q1 2023.

| SURVEY OVERVIEW | | |
|---|---|---|
| Methodology | **Online Survey** | |
| Sample Size | **Total Respondents** | **5,534** |
| | **Consumers** | **4,358** |
| | **Non-consumers** | **1,176** |
| Fielding Dates | **Feb 17 - Feb 26, 2023** | |
| Mean Duration | **16 minutes** | |
| Margin of Error | **Consumers** | **±1.48%** |
| | **Non-consumers** | **±2.86%** |

## SAMPLE DESCRIPTIVES

| SURVEY SAMPLE DEMOGRAPHICS | CURRENT CONSUMERS | NON-CONSUMERS |
|---|---|---|
| **Sample Size** | **3867** | **1176** |
| **Age** | | |
| 18-24 | 10.1% | 10.7% |
| 25-34 | 23.8% | 12.2% |
| 35-44 | 23.1% | 13.4% |
| 45-54 | 17.7% | 16.8% |
| 55-64 | 15.0% | 18.5% |
| 65+ | 10.3% | 28.5% |
| **Gender** | | |
| Male | 54.2% | 45.0% |
| Female | 45.6% | 55.0% |
| Nonbinary/other | 0.2% | 0.0% |
| **Home State Cannabis Market** | | |
| Adult-use | 52.1% | 43.9% |
| Medical only | 25.3% | 26.8% |
| Illicit | 22.6% | 29.3% |
| **User Type Self-Identification** | | |
| Only medical | 14.8% | n/a |
| Primarily medical | 27.7% | n/a |
| Primarily recreational | 25.2% | n/a |
| Only recreational | 32.4% | n/a |
| **Household Annual Gross Income** | | |
| Under $25,000 | 16.7% | 15.2% |
| $25,000 - $49,999 | 20.6% | 21.9% |
| $50,000 - $74,999 | 19.2% | 17.3% |
| $75,000 - $99,999 | 14.0% | 13.0% |
| $100,000 - $124,999 | 8.4% | 8.8% |
| $125,000 - $149,999 | 6.5% | 6.5% |
| $150,000 - $174,999 | 4.2% | 4.6% |
| $175,000 - $199,999 | 4.3% | 3.1% |
| $200,000 or more | 5.4% | 7.9% |
| Prefer not to say | 0.7% | 1.7% |
| **Education** | | |
| Some high school | 3.0% | 2.6% |
| High school diploma | 21.9% | 17.6% |
| Some college | 21.4% | 17.3% |
| Associate's degree/Trade school | 15.6% | 15.0% |
| Bachelor's degree | 24.5% | 29.1% |
| Advanced degree | 13.7% | 18.4% |
| Other | 0.1% | 0.1% |
| **Racial/Ethnic Identity** | | |
| White | 62.6% | 63.4% |
| Hispanic/Latinx | 14.4% | 12.6% |
| Black | 14.2% | 12.4% |
| Asian | 3.2% | 6.5% |
| Mixed | 3.7% | 2.7% |
| Middle Eastern/North African | 0.3% | 0.5% |
| Pacific Islander/Native Hawaiian | 0.2% | 0.3% |
| Native American/First Nations | 1.0% | 0.3% |
| Other | 0.2% | 0.3% |
| Prefer not to answer | 0.3% | 1.1% |

# About Us

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 policymakers tow, 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 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.

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