

Voice of the Consumer: Cannabis Survey 2022

December 2023

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INTRODUCTION

Scope

Key takeaways

CANNABIS USAGE PATTERNS

Among users, adult-use cannabis has more daily consumers than CBD and medical cannabis

Differences between reported current and hypothetical consumptions

Preference for smokeable formats more common among frequent cannabis users

Usage of CBD, medical and adult-use cannabis impacts the same products in similar ways

Cannabis as a replacement or complement for other products

CONSUMPTION OCCASIONS AND DRIVERS

Users of the three categories mainly consume cannabis while relaxing at home

Flower is the most popular format across most consumption occasions

Similar reasons for consumption within CBD, medical and adult-use cannabis

PERCEPTIONS AND ATTITUDES

Distinct views on the legal status of cannabis across geographies

Cannabis is still a topic with polarised views across the global population

Most respondents think governments should control cannabis distribution and production

Tobacco is seen as a regulatory and taxation model for most consumers

North Americans are the most optimistic about legalization for recreational use

ADULT-USE CANNABIS: MARKET SIZE ESTIMATION EXERCISE

Maximum potential adult-use cannabis market size in Europe

Maximum potential adult-use cannabis market size in the rest of the world

CANNABIS SURVEY OVERVIEW

An overview of the Voice of the Consumer: Cannabis Survey 2022

Markets currently covered in the Voice of the Consumer: Cannabis Survey

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