

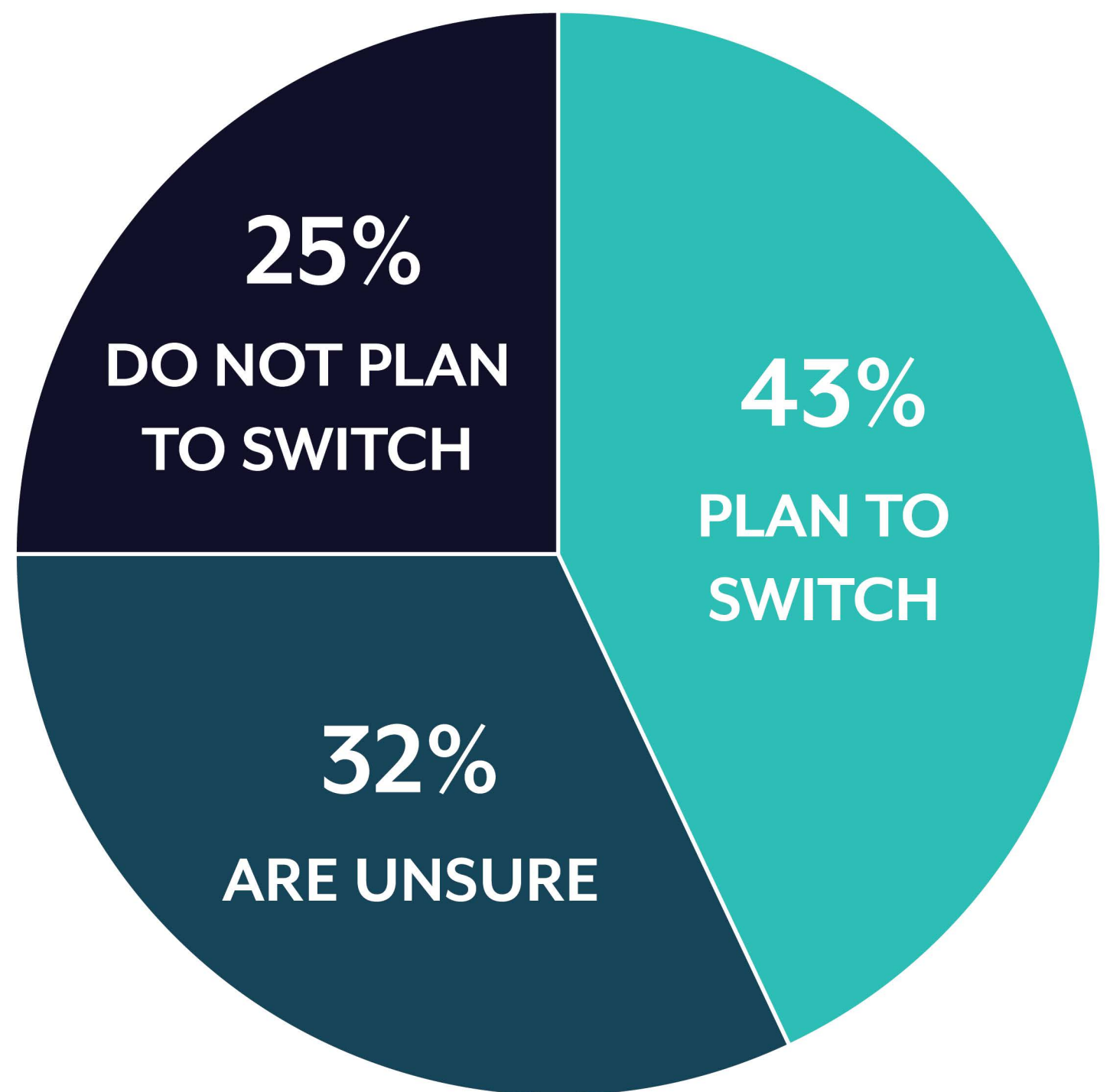
Canadian Cannabis Consumer Response to COVID-19



Changes in Where Canadians Purchase

Though e-commerce is now a viable and tempting option for many, Canada Post's decision presents a barrier here too, though other services (e.g. Purolator, FedEx, Pineapple Express) have been stepping up to fill the void, adapting their signature processes/requirements.

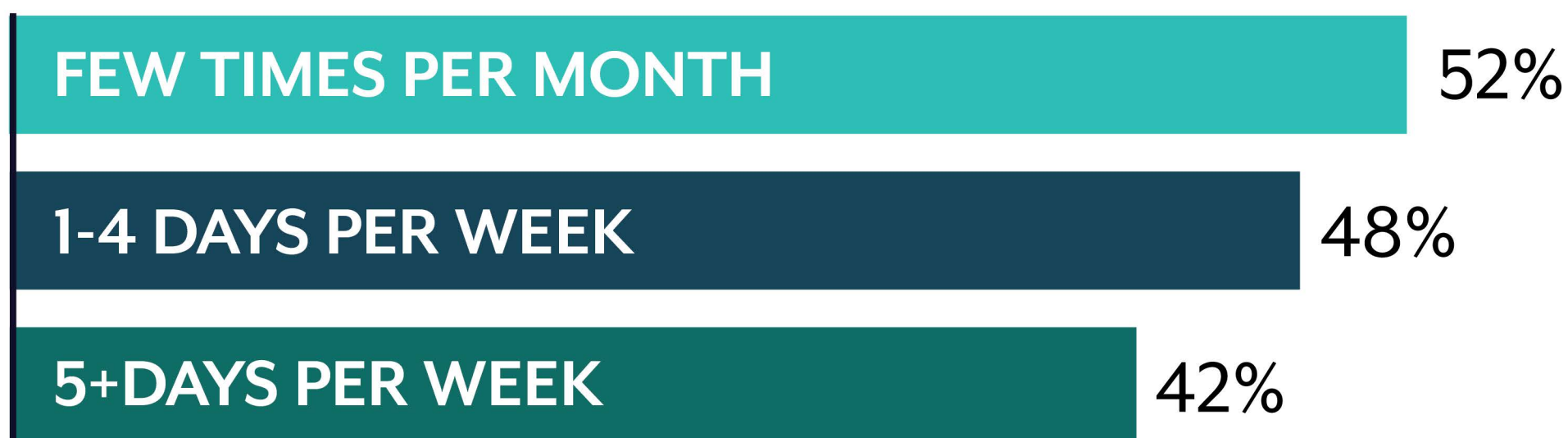
Will Canadian consumers switch to delivery or click and collect?



Changes in Purchase Frequency

Most provinces have deemed cannabis retailers and supply chains “essential.” In a unique move, Ontario reversed course on its shutdown of dispensaries following urgent calls for change from local retailers. They are now (temporarily) allowing for curbside pickup and direct delivery by licensed cannabis retailers, so long as storefronts remain closed. Elsewhere, dispensaries elected to limit hours or close, and consumers are likely to avoid in-person interactions, further limiting traffic.

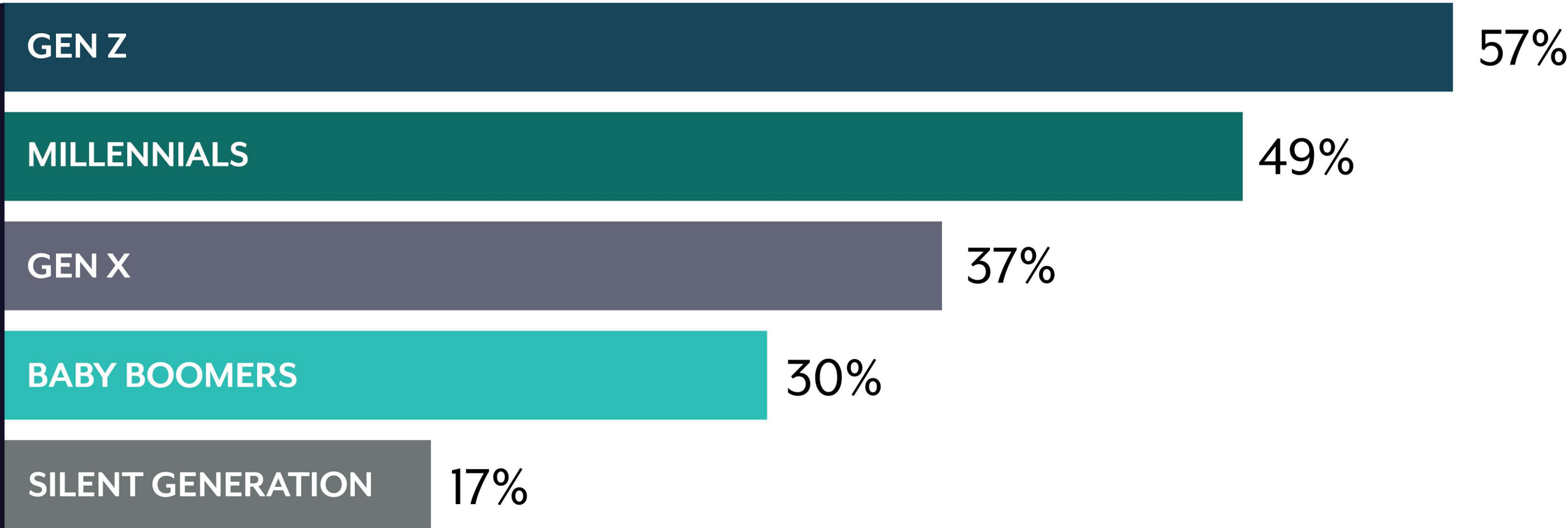
% PLANNING TO BUY CANNABIS LESS FREQUENTLY BY USAGE RATE



Changes in Cannabis Spend

Despite concerns about respiratory complications, only 4% of consumers surveyed are using fewer inhalable products as a result of COVID. With concerns around safety hardly affecting product purchasing pattern, brands reliant on flower or vape sales will see similar impact as their Canadian 2.0 competitors.

% PLANNING TO SPEND LESS ON CANNABIS
BY GENERATION



Increasing Usage

OF CANADIAN CANNABIS CONSUMERS,



32%

**plan to use cannabis
more frequently**



25%

**plan to spend more or already are
spending more on cannabis**

Registered medical cannabis users are also more likely to be using more frequently, likely to offset increased levels of anxiety, depression, and chronic pain during this difficult time. 43% of Canadian medical cannabis patients recently surveyed reported using cannabis more frequently due to this crisis, with their added spending potentially offsetting drops in new patient enrollment for the year.

We're Brightfield Group, and we provide consumer insights and market intelligence for the CBD and Cannabis industries.

Fusing intelligent machines with real human analysis, we help you navigate the dynamic CBD and Cannabis markets as data-driven storytellers. With us, you don't just get the numbers; you get a trusted partner, providing a robust picture of the landscape and an actionable plan for the road ahead. See what we can do for you at www.brightfieldgroup.com.



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