

Innovation Brief:

Pandemic Product Trends

AUGUST 2020

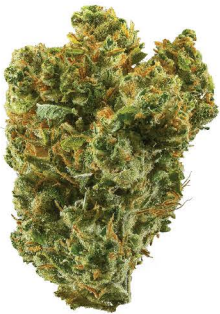
Introduction

As the Covid-19 pandemic continues to sweep across the United States (and much of the world at large), people are spending the vast majority of their time in their homes. Many office employees are still stuck working from their bed or living rooms. This increase in time spent at home presents millions of individuals in legalized-cannabis states with opportunities to consume some bud at any time of day.



Cannabis for Focus & Creativity

For those who need to balance their cannabis usage with being productive during work hours, consumers are facing an increasing plethora of options. According to our Innovations Insights portal, the Focus & Creativity positioning saw the largest month-over-month growth of any cannabis product positioning during the month of June. This indicates retailers are tailoring their products to serve the needs of office workers finding struggling to stay productive while working at home.



One cannabis strain which embodies the Focus & Creativity surge is Super Silver Haze. An older cannabis variety that competed at the High Times Cannabis Cup in the late 90s, this strain has generally not been a prominent part of the popular cannabis consciousness. However, the distribution for Super Silver Haze grew exponentially in recent months. Its distribution increased twenty-fold in the course of just thirty days. This product's branding as "a legendary strain for its productive high that keeps you smiling all afternoon" is perfectly suited to those who are seeking to use cannabis on an afternoon break.

Similarly, the cannabis strain Strawberry Banana - produced by Emerald Family Farms- advertises it will create "peaceful effects that sharpen creativity and sensory awareness" when consumed.

The vast majority of new launches and disruptors that fall under the "focus and creativity" positioning are vapes and flower, with a sparse number of edibles and virtually no tinctures or capsules.



Cannabis for Anxiety & Stress

Though many are stuck laboring inside, working from home definitely isn't the only concern on cannabis consumers' minds. The increase in cannabis product positionings directed towards managing Anxiety and Stress ranked second and third in month-over-month growth, respectively. Products related to both Anxiety and Stress appear over a greater variety of product types than do those designed for Focus & Creativity. This includes a wide variety of tincture, flower, and vape products.

Among these items, DNA Genetics' Lemon Skunk has the greatest overall market share among flower. When positioned as an anti-anxiety product, the strain boasts effectiveness at combating negative thoughts and feelings throughout the day and evening. However, the product which has made the biggest splash during the pandemic is Yummi Karma YK Drops, specifically the company's Perfect Pair and Cloud Nine varieties. Neither product is entirely THC, with Yummi Karma placing emphasis on the entourage effect in their marketing. Perfect Pair features a 1:1 THC:CBD ratio while Cloud Nine has a ratio of 4:1 – which the company states as being most preferable to those who struggle with anxiety.



Cannabis & Gaming:

An Underserved Opportunity

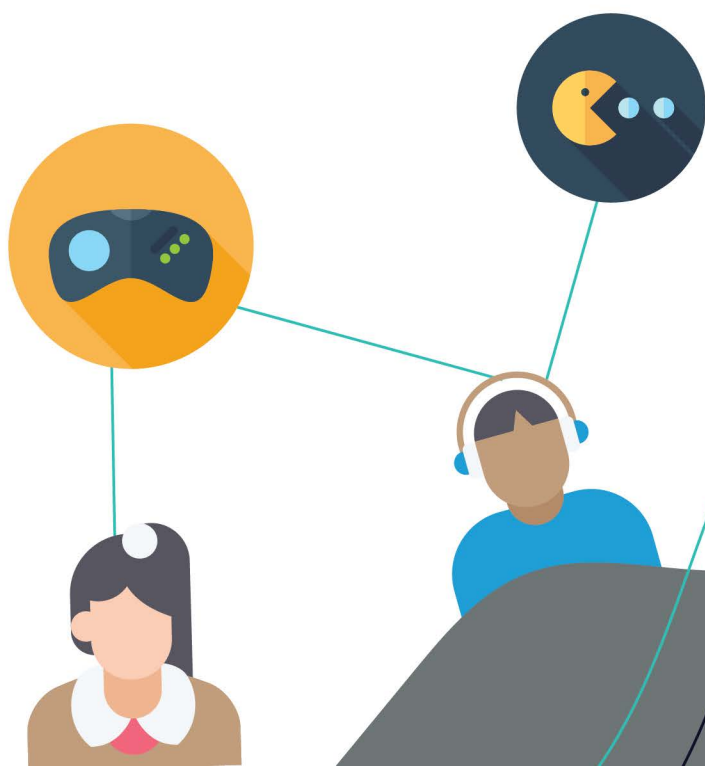
As the pandemic has progressed, it is clear brands and retailers have tailored products to new consumer need states during this trying time. However, are there any other cannabis positionings thriving during this crisis that brands have yet to pick up on?

Social volume data reveals a mismatch between consumer desire and what is currently available on the cannabis market. Based on the posts of cannabis users, consuming cannabis while playing video games has seen a huge increase during the pandemic. But at the same time, the number of products available on retail shelves positioned for the gamer actually contracted by 50% during the month of June. Even though video games remain a relatively niche positioning in the grand scheme of the market, an increasing number of consumers interested in gaming and weed are facing a shrinking number of purchasing options.

From May to June 2020,
social conversations
around cannabis & video
games increased by

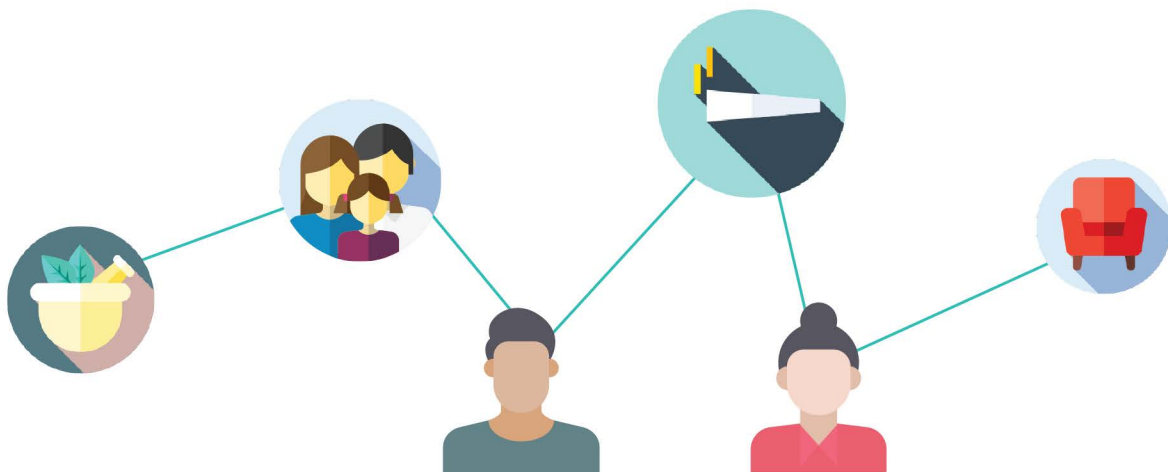
37%

Source: Brightfield Group Innovation Insights



Conclusion

Understanding how consumers spend their time and which activities they mix with cannabis is key to creating both a product which individuals want to buy and a marketing plan to move them down the purchasing funnel. As consumers continue to face the changes brought on by the pandemic, companies have an opportunity to appeal to a captive consumer base who views cannabis as a real aid during this ongoing crisis.



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.