
Q4 2021 Canadian Budtender Survey Results

December 2021



Objectives & Methodology

Objectives

- Develop a profile of Canadian budtenders as both store associates and cannabis consumers
- Determine the brands resonating with budtenders and why
- Identify what factors budtenders consider before recommending a brand

Methodology

- Brightfield Group conducted an online survey (October 25 through November 16, 2021) of 406 Canadian budtenders leveraging a panel of budtenders from the Spiffy network. 113 different stores/chains are represented.
- Report includes:
 - How are budtenders influencing purchases?
 - How does budtender cannabis use impact their recommendations?
 - How can budtenders be influenced?
 - How do budtenders feel about the industry and their jobs?
 - Key takeaways

About Us



- **Brightfield Group** is the leading research firm for emerging markets including CBD, Cannabis, and Wellness. We create unique multi-source methodologies across all our offerings to provide the best insights possible for our clients.
- **Brightfield Group** takes a multi-source approach to all of our research – syndicated and custom. We strongly believe a variety of data sources can be strategically brought together to answer difficult questions very quickly.



- **Spiffy** is an app that connects brands to front line teams and educates them on the products they sell - making need-to-know information not just easily-accessible, but memorable and rewarding.
- With short bursts of content (including video) and quick quizzes, **Spiffy** delivers a consistent training experience that's more akin to social media for the users; and more turn-key for administrators than any other product on the market.
- In addition to key information from their employer, users are treated to professionally produced content from **Spiffy** content partners, who want to ensure their brand is properly represented and recommended on the front line; including (but not limited to) navigation of sales conversations and customer-qualifying questions.

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Budtenders are the missing piece of the puzzle, and they have considerable power over shopper decisions

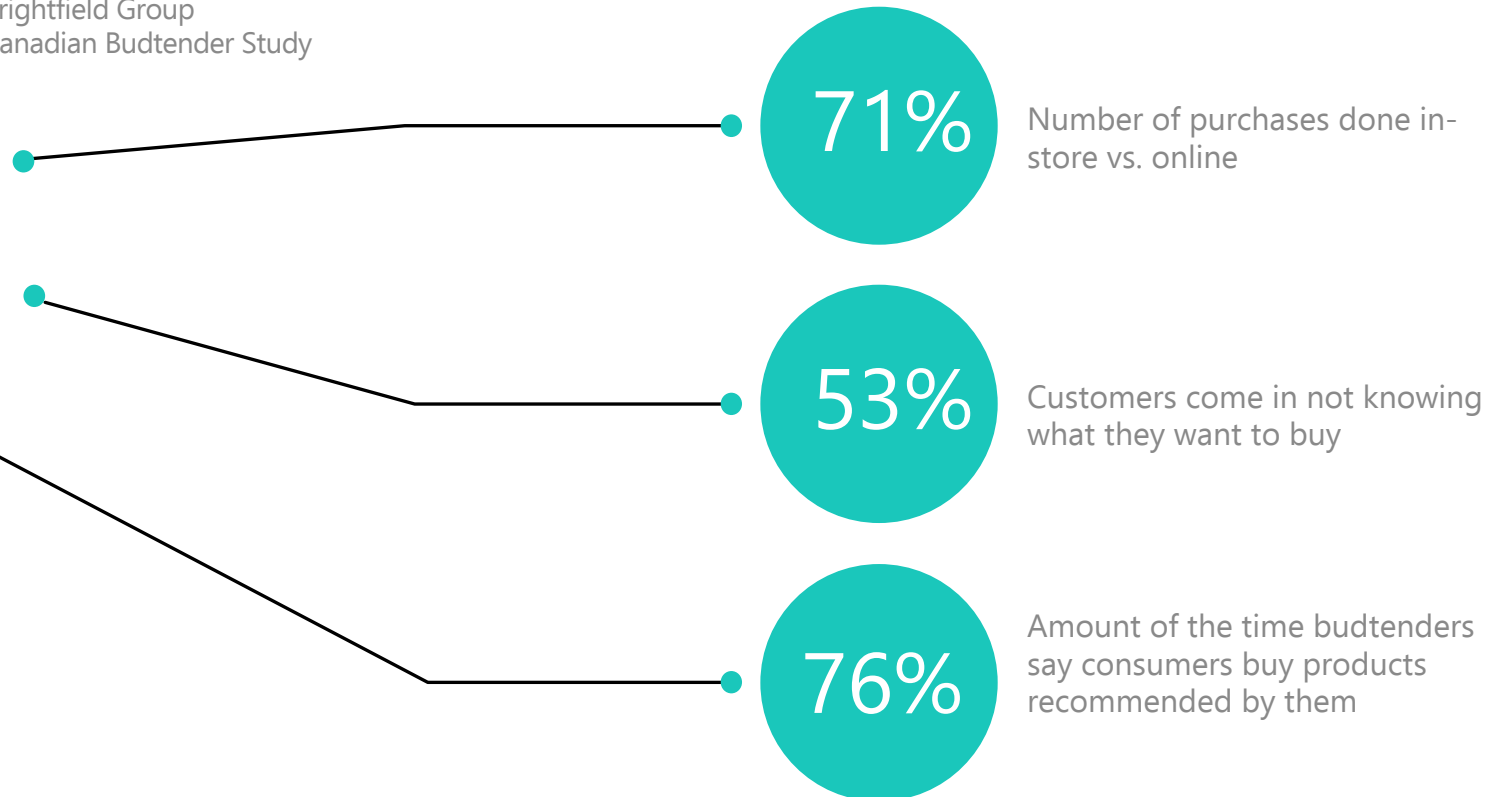
Sales Volume

Point-of-Sale Data



Budtender Influence

Brightfield Group
Canadian Budtender Study



The Consumer

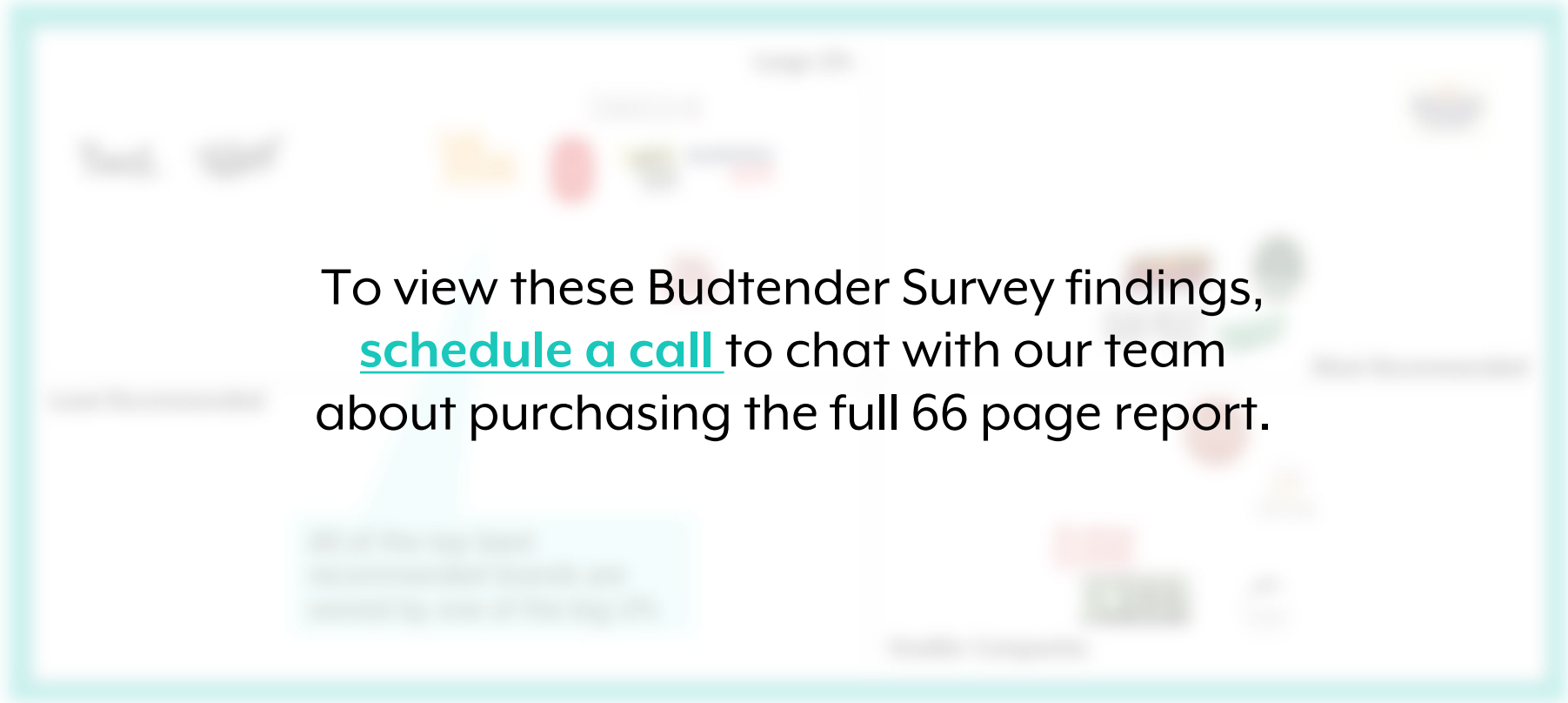
Brightfield Group
Canada Cannabis Survey

How often do consumers come in knowing what they want to buy? How often would you say consumers buy the products you recommend?
How often do consumers buy something you didn't recommend?

Budtenders gravitate towards smaller, craft brands

- Budtenders recognize that **all brands are not the same** and most are willing to go out of their way to find certain brands
- Budtenders most value cannabis companies that are known for **treating employees well**, are **authentic**, and have a legacy of **quality**
- Budtenders said they'd be more likely to recommend certain brands if they had **access to samples/free products**, training on the brand, or brand swag

Recommended Brands



To view these Budtender Survey findings, [schedule a call](#) to chat with our team about purchasing the full 66 page report.

How do budtenders learn about new products and/or decide what to buy/recommend?

Brand Attributes

Terpene profiles and price are most important to budtenders in determining whether to purchase a new product, while effectiveness and taste/smell are most important when determining whether to purchase again



Sampling

Many budtenders use sampling to learn about new products; these samples are purchased for them by brand reps, themselves, or other co-workers



Brand Reps & Budtenders

Brand reps/ambassadors and other budtenders are most common ways that budtenders are learning about new brands and products



Social Media

Many budtenders use social media to learn about new products



Budtenders have a love/hate relationship with shoppers, but they do not have love for Canadian regulations

- By far, the most asked question of budtenders by customers is regarding THC potency, which annoys budtenders
- While many budtenders cited the relationships they've built with their customers as their favorite things about their stores, difficult customers are one of the biggest pain points for budtenders

Shoppers



- Most budtenders are satisfied with their current cannabis store; those that aren't have issues with management, their pay/hours, and corporatization

Cannabis Stores



- Budtenders' biggest issues with cannabis brands are low quality and inconsistent products; excessive packaging and dry/not fresh bud were also frequently mentioned

Canadian Brands



- Budtenders think the edible dosage cap should be changed, along with the cap on flower quantity
- They think they'd be able to do their jobs better if shoppers and they were allowed to see/smell products before buying them

Regulations



THC potency tops most asked questions of budtenders ...something which annoys budtenders

Budtenders' FAQ from Customers



What are the most common questions you get from shoppers?
N=400

Budtender's strong opinions indicate they don't recommend these brands because...

- They don't think the price matches the quality
- Have gotten negative feedback from shoppers
- They don't think the brand is being transparent about their THC content

Brand #1

“**Brand #1.** and **Brand #2** are always dry , small , crumbly etc. they advertise everything having a THC content of 20.0% across the board which is false advertisement.”

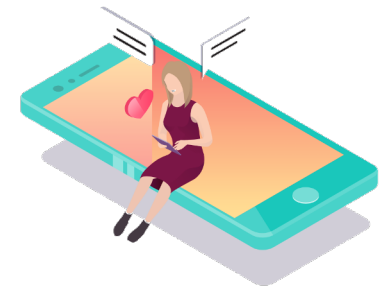
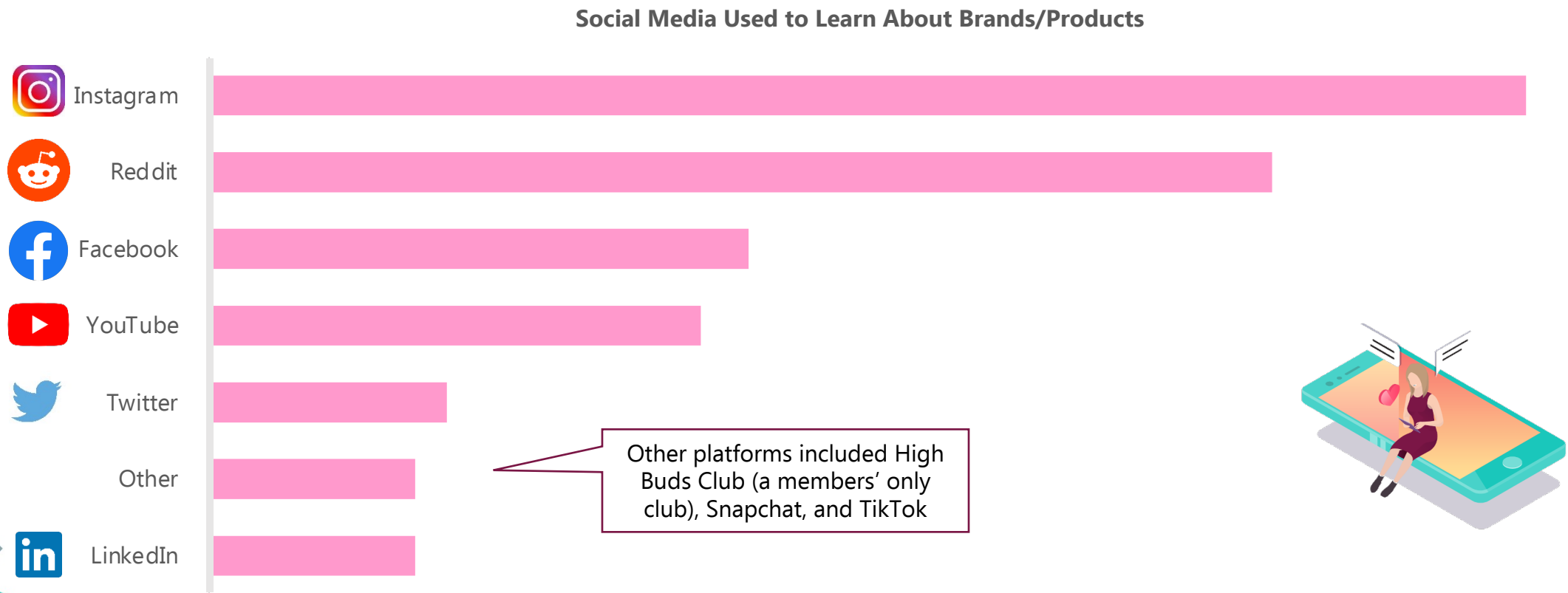
Brand #2

“ blanket THC % listed on products *cough cough **Brand #2** - we know majority of the time the bud is less than 20% THC. It makes me feel mislead as a consumer but also makes me feel guilty when selling this product to someone”

Brand #3

“ **Brand #3** I find low quality, I will only recommend if it costs ineffective or pertains to someone's situation”

Instagram & Reddit most used social sources for learning about new products



Budtenders are opinionated and direct in their observations...

Brand #1

Rankings	% of budtenders
Favorite brand	29%
Recommended	35%
Not recommended	2%
Considered premium	35%

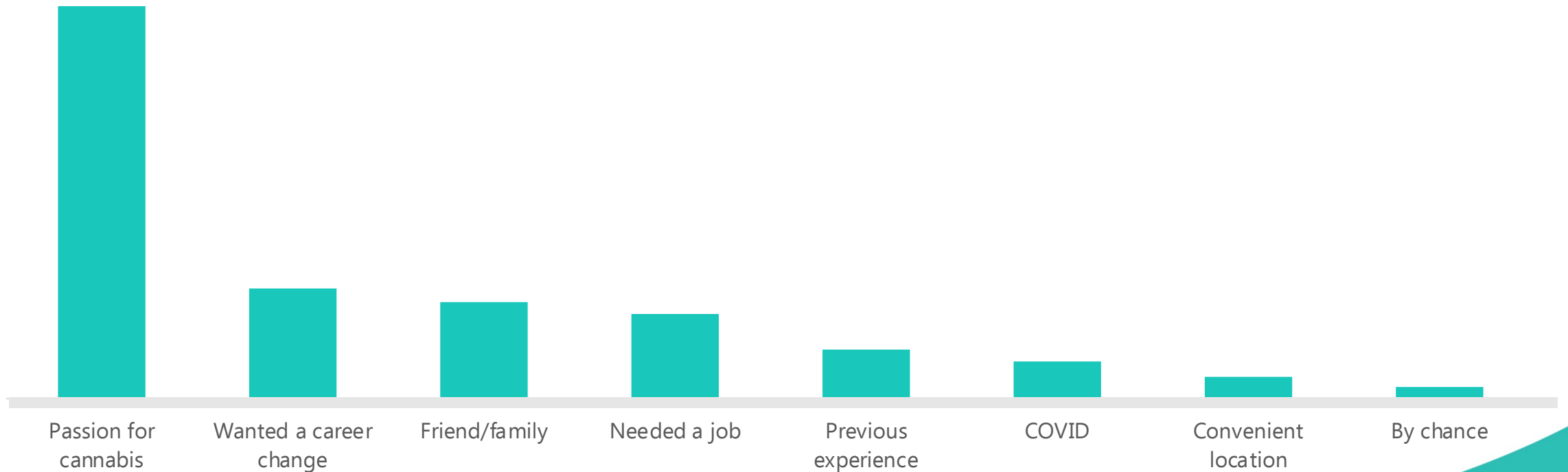
Get deeper dive profiles on the most loved & hated budtender brands in Canada, complete with direct quotes and verbatims from the budtenders themselves.

“ For the most part good quality for a good price, as for their competitor and this **Brand #1**, they are the only brands with some of my favorite strains to the legal cannabis market, and I am willing to pay the extra “*premium*” fee for it every once in a while.”

“ they are the only brand with some of my favorite strains to the legal cannabis market, and I am willing to pay the extra ‘premium’ fee for it every once in a while.”

Passion for cannabis is the driving force for the majority of Budtenders

Why budtending?



Summary

This has been a preview from our 2021 Canadian Budtender survey.

Get the full eye-opening survey findings, which are full of budtender opinions and influences, inclusive of brand-specific details, to showcase the overall impact on the cannabis industry.

To purchase the full 66-page report, [schedule a call](#) with our team.



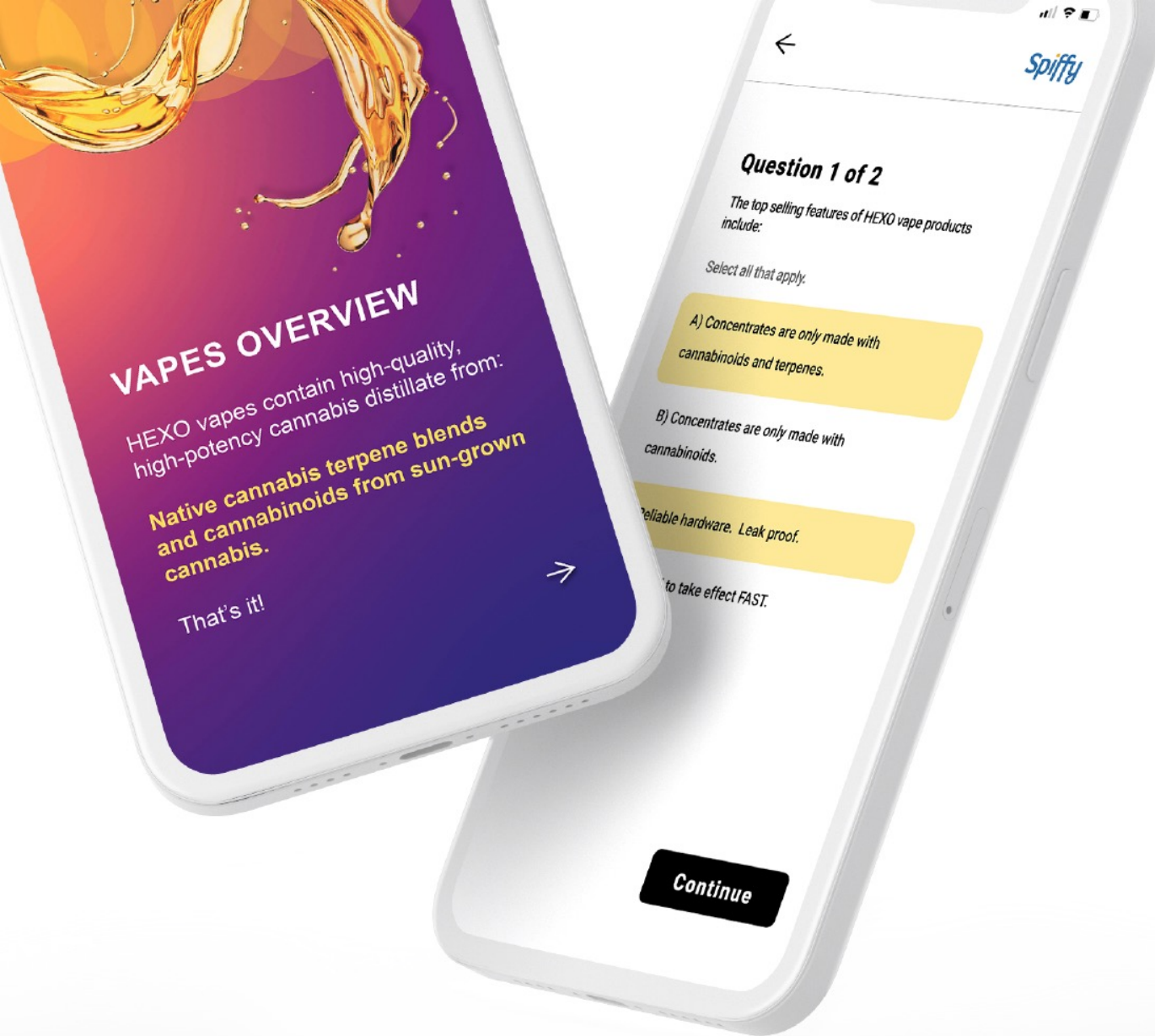
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Brightfield Group is the leading research firm for emerging categories including CBD, Cannabis, and Wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. We have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea since 2015.

See what we can do for you at brightfieldgroup.com.



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*Yesterday's tools won't
engage today's teams.*

Engage and inform front-line teams.

Increase brand recognition.

Start real-world sales conversations.

Spiffy 