
2024 Canadian Budtender Study – Executive Summary

June 2024

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Objectives & Methodology

Research Objectives: Brightfield and O2O wanted to better understand budtenders' role in the cannabis shopping process from the budtender's perspective. More specifically they wanted to:

- Determine which brands are resonating with budtenders and which are not
- Identify the key areas that budtenders consider before recommending a brand to consumers in the cannabis store
- Understand what information and marketing materials budtenders find most helpful and what they think are helpful for consumers

Methodology: This is a multiple year online study with the first study conducted in 2021 among 204 budtenders from the Spiffy network. The 2023 study was fielded Feb/Mar 2023 among 482 Canadian budtenders recruited via the O2O network. The 2024 study was also fielded among the O2O network in April 2024. The 2024 sample was 527 budtenders.



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Brands Evaluated in the Study

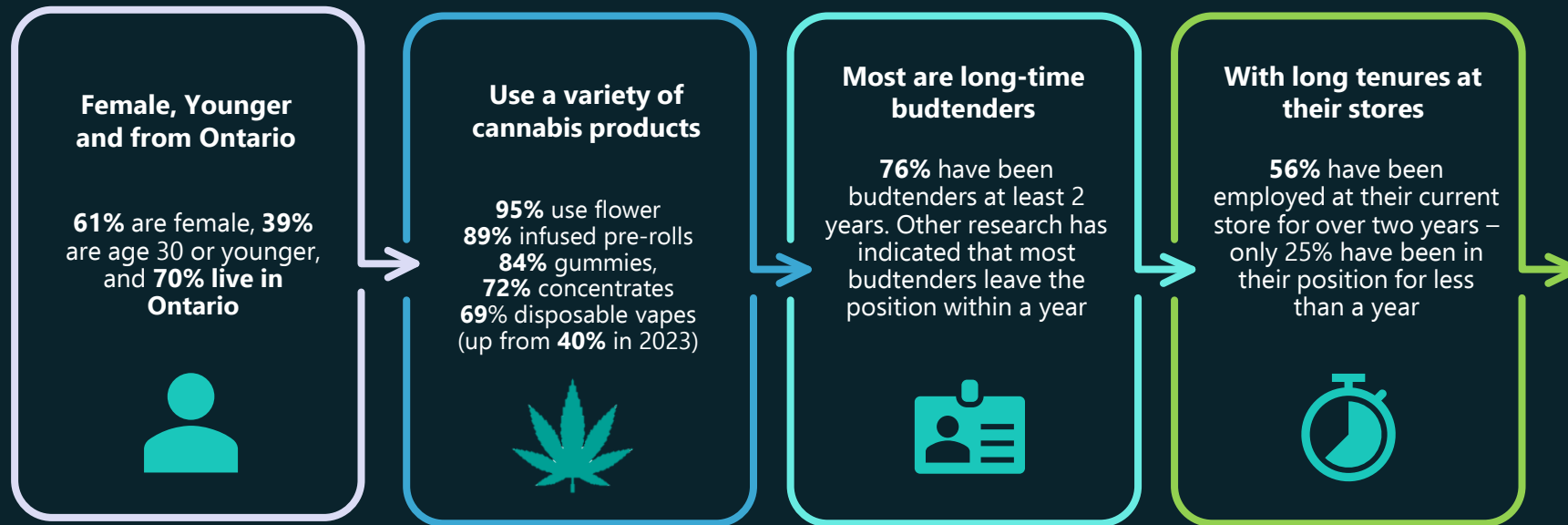
2023 Brands

1964	Good Supply	The Batch
~ness	Grasslands	Tokyo Smoke
3Saints	HEXO	Topleaf
7ACRES	Holy Mountain	Trailblazer
Aurora (Drift)	Indi	Tremblant
B!ngo	Indiva Life	Twd.
Back Forty	Kolab Project	Tweed
Bake Sale	Laurentian	Versus
Bhang	Marley Natural	Wana
Big Bag O' Buds	Monjour	Weed Me
BlendCraft	OMY!	wyld
Broken Coast Cannabis	Original Stash	XMG
Bubble Kush Drinks	Pure Sunfarms	
BZAM	Qwest	
Canaca	Qwest Reserve	
Chowie Wowie	RAD	
Citizen Stash	Redecan	
Color Cannabis	RIFF	
Dab Buds	San Rafael '71	
Daily Special	SHRED/ SHRED'EMS	
Divvy	Simply Bare	
Dosecann	Solei	
Edison Cannabis Co.	Spinach	
FIGR	Spiritleaf Selects	
Foray	Sundial Cannabis	
Fraser Valley Weed Co.	T2.0	
General Admission	Table Top	

2024 Brands

1964	Foray	Spiritleaf Selects
~ness	Fraser Valley Weed Co.	Sundial Cannabis
3Saints	Fuego	Sweet Justice
7ACRES	General Admission	Tokyo Smoke
Aurora (Drift)	Good Supply	Trailblazer
Axea	HEXO	Tribal
Back Forty	Highly Dutch Organic	Tweed
Bake Sale	Keef	Versus
Bhang	Kolab Project	Vortex
Big Bag O' Buds	MediPharm Labs	Wana
BoxHot	Mollo	Weed Me
Broken Coast Cannabis	Monjour	wyld
Bubble Kush Drinks	MTL Cannabis	XMG
BZAM	NightNight	
Canaca	Original Stash	
Carmel	Pearls by grön	
Chowie Wowie	PHRESH	
Citizen Stash	Pure Sunfarms	
Collective Project	Qwest	
Color Cannabis	RAD	
Dab Bods	Redecan	
Daily Special	RIFF	
Divvy	San Rafael '71	
Edison Cannabis Co.	SHRED/ SHRED'EMS	
Endgame	Simply Bare	
Five Founders	Solei	
Floresense	Spinach	

Respondents, again, skewed towards more invested, long-time budtenders



Key Takeaways



Terpenes and strain lineage are on budtenders' minds

Terpenes attract budtenders to new products, but effectiveness keeps budtenders coming back to those brands. Strain lineage was added this wave and is quite important, with one in three budtenders choosing it in their top 3 purchase factor decisions. Flavor/Aroma declined in importance.

Small batches and attentive cultivation have become top indicators of premium items while good terpene profile declines. When asked, budtenders said they want more info on terpenes and the growing process.



Budtenders Say They Have Sway

Budtenders believe they make a big impact on consumers decisions. because most sales are made in-store and most of the time consumers don't know what they want when entering the store.

Personal experience continues to impact brand recommendations. The second and fourth most popular questions asked of budtenders is what they would recommend and if they have tried it. THC content continues to lead the questions asked although budtenders wish it wasn't such a focus. They like that other cannabinoids are starting to get attention.



Newly Added Brands Lead the Pack

Budtenders are drawn to craft like smaller players. Two of the five top brands to consume themselves and recommend are new additions to the study – Carmel and MTL Cannabis. 1964, Simply Bare and Tribal continue to do well. Last year's most recommend brand, General Admission came in 4th.

Many of the least recommended brands continue to be owned by the largest LPs. Poor quality, bad experience, and poor reputation/practices are top reasons for not recommending.



Budtenders turn to brands for support

Budtenders appreciate and want more education from brands. Samples increased as incentive to recommend a brand and contrary to 2023, budtenders are now mostly getting samples from sales reps. Samples increased as way to learn about new products, but sales reps remain top source. Swag may have less of an impact than in the past.

In-person sales rep visits are key. Authenticity, Quality and Healthy Corp Culture are valued most in a cannabis company but provides Great Product Education (new this wave) comes in 4th. Budtenders prefer product info cards and sell sheets. Posters and shelf talkers are most helpful for customers. Tent cards increased in importance and sell sheets dropped.

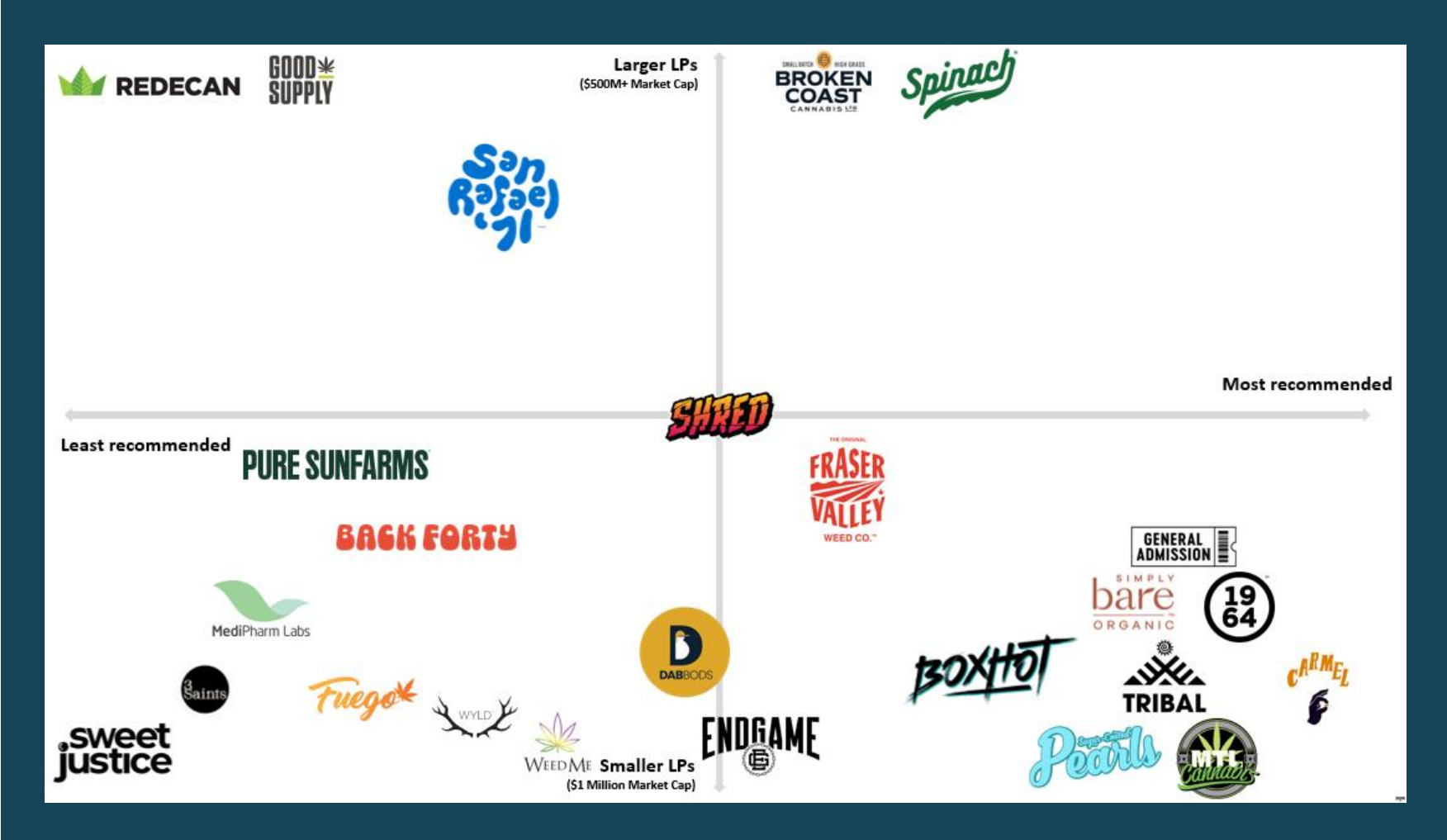


Budtenders are hopeful and excited for the industry

Budtenders see a lot of positive changes on the horizon. Many mentioned being excited by a lot of the new products, legislation changes, community building, pop up events, consumption lounges, flower lineage, terpene, interest in cannabinoids, and the focus on quality over quantity.

The top 25 recommended brands – Budtenders are drawn to smaller LPs

Budtenders are critical and discerning when it comes to brands. They continue to be **critical of large LP brands** as seen in the 2021 and 2023 study.



Note: Size of LP based on Market Capitalization <https://ca.finance.yahoo.com/>



2024

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O2O connects cannabis brands and retailers, bridging the marketing gap and supporting asset management delivery, efficiently & effectively. Today, the platform houses over 100+ Canadian cannabis brands, 1500+ Canadian cannabis retailers, and over 5000+ physical and digital assets.

Brands use O2O to increase distribution and sell-through by getting product information into the hands of retailers from coast to coast. Retailers love the convenience of browsing & ordering marketing material from leading cannabis brands all in one place - all at no cost.

Now more than ever, O2O has become a trusted partner, supporting the cannabis community with efficient asset organization, increased productivity, reporting and industry collaboration. For more information on O2O, visit useo2o.com.