

Building a Consumer Technical Model for Cannabis Products

INSIGHTS & CONSIDERATIONS

CORESTA – CROM
Abuse Liability Symposium
February 13, 2023



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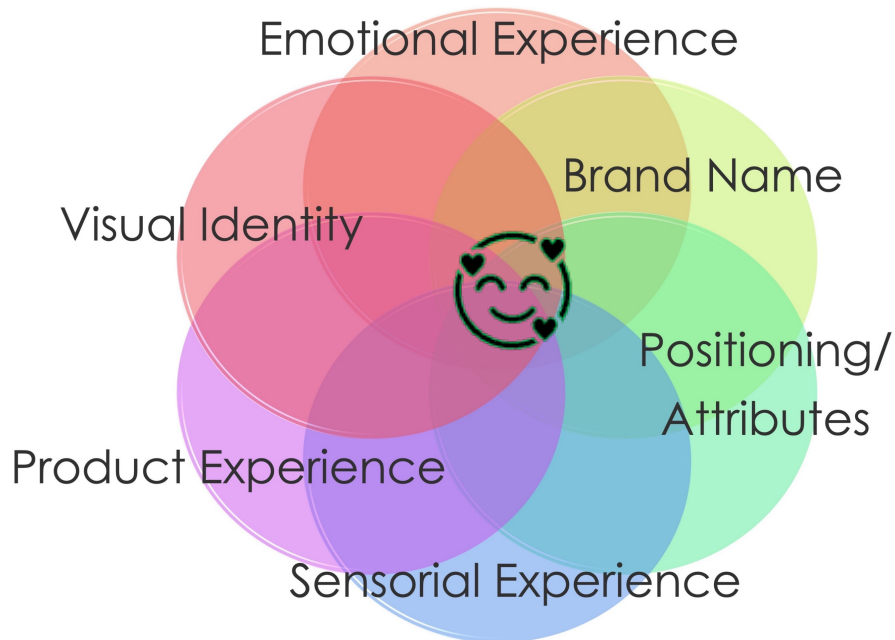
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Our agenda...

- HCD Brand Harmony™
- The Consumer Technical Model for Cannabis
- 2021 & 2022 HCD Cannabis Research
 - Defining ‘*cannabis consumer*’
- Key Insights
 - Top drivers?
 - Top opportunities?

WHAT IT IS & WHY YOU NEED IT

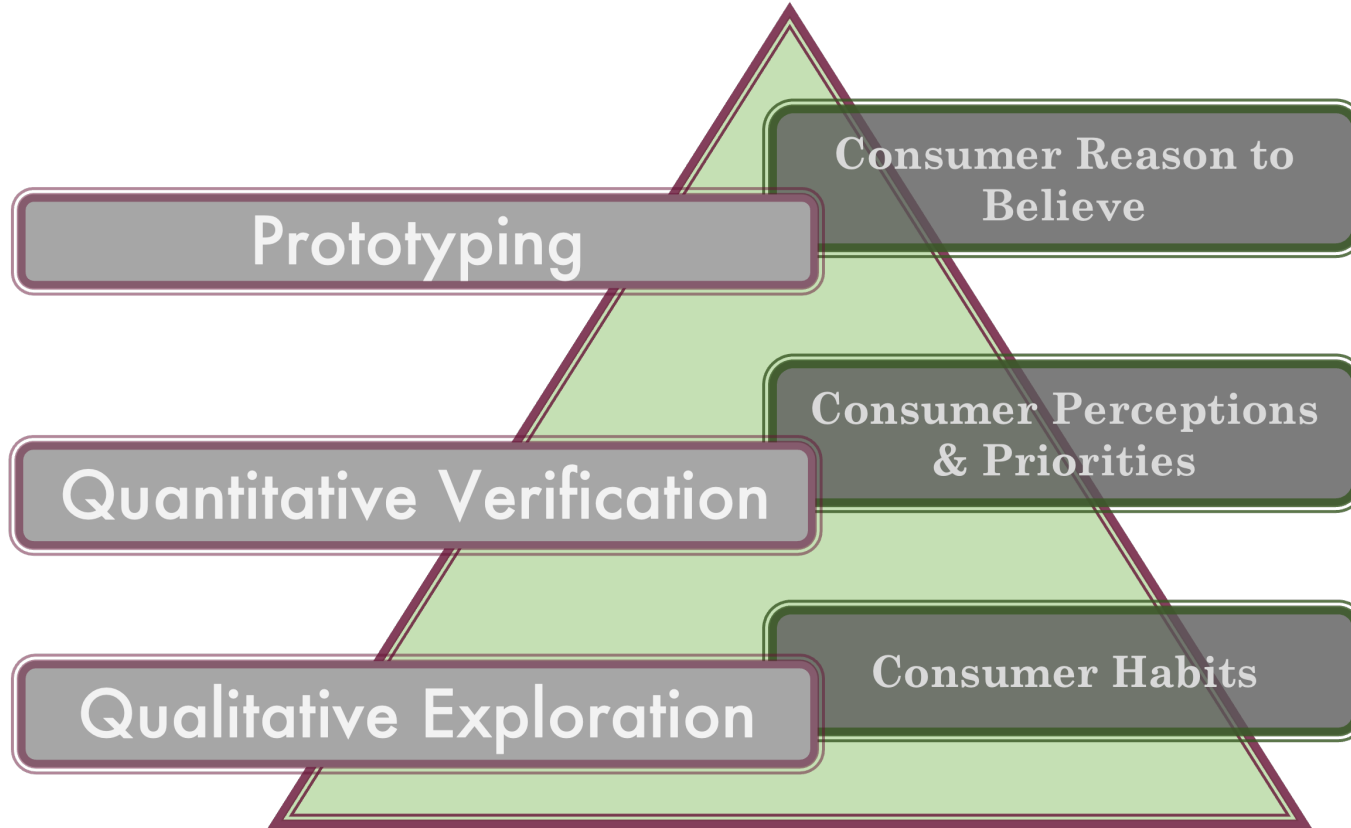


- **Connecting branding, marketing, and performance**
 - Incongruence results in unmet expectations by the consumer – loss of confidence
- **A comprehensive product experience tells a universal narrative**
 - A distinct and consistent product profile helps consumers recognize and differentiate your brand
- **Marketing must be right**
 - Consumers may not try your product if the marketing isn't enticing
- **Product must match performance promises of marketing message**
 - Increases consumer satisfaction, connection, & brand equity



Consumer Technical Model for Cannabis

THE PATHWAY TO BRAND HARMONY



- Creating pipelines of disruptive, innovative products **requires building consumer adoption** based on **understanding consumer perceptions, needs, and habits**



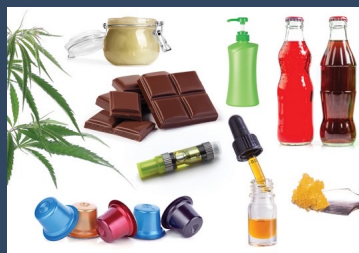
2021 SYMBOL PERCEPTION

- Setting the standard based on perceptions.
- Implicit Association Testing (**IAT**)



2022 DRIVERS, PERCEPTIONS & OPPORTUNITIES

- Implicit Association Testing (**IAT**) + Maximum Difference (**MaxDiff**) = MaxImplicit (**MaxIAT**)
- Descriptive & emotional – product format exploration



2021 & 2022 LANDSCAPE RESEARCH

- Self-report surveys – user vs non-user
 - Who?
 - Why?
 - Where?
 - What?
 - How?





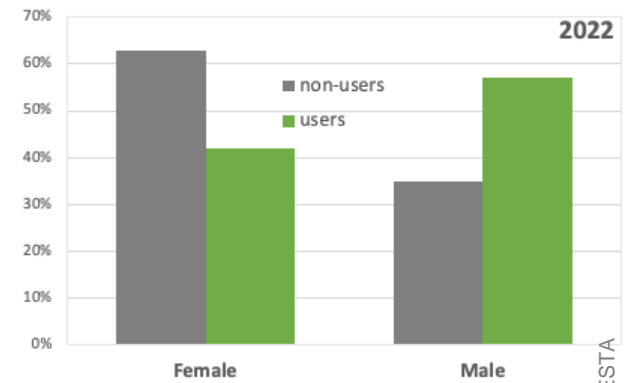
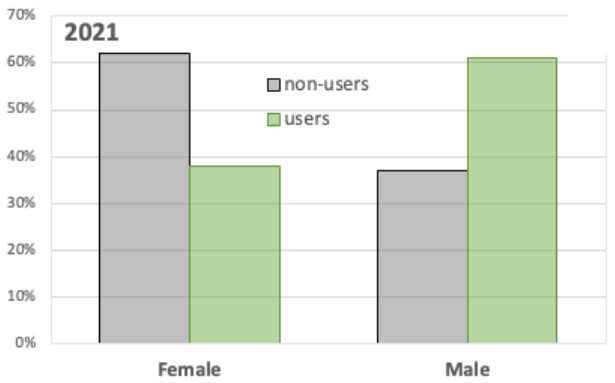
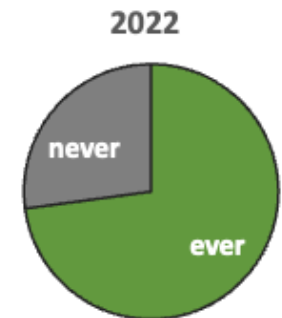
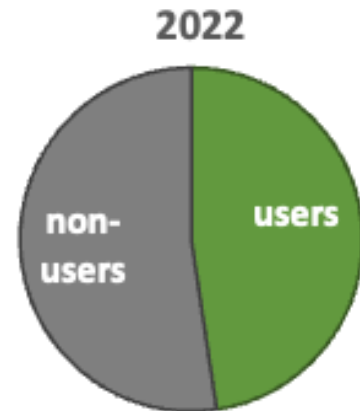
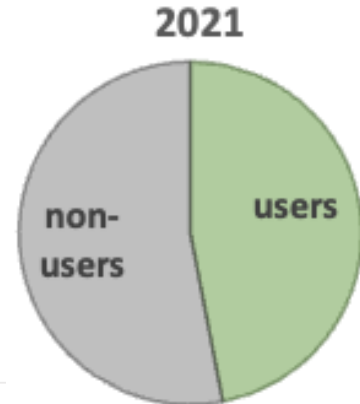
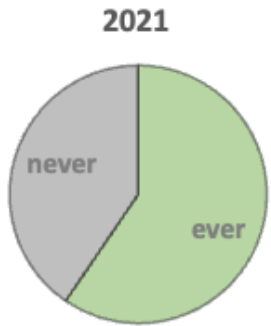
2021 & 2022 Cannabis Consumer



n=275

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n=216



EVER USE

- 2021 – 60%,
 - 2022 – 73%
- reported trying cannabis at some point

CURRENT USE

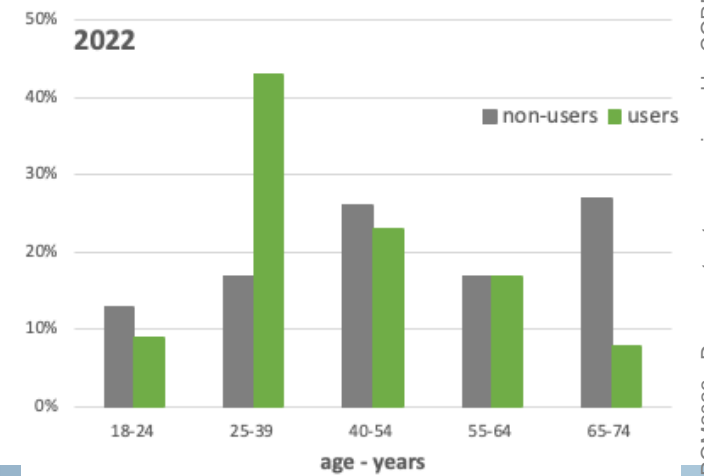
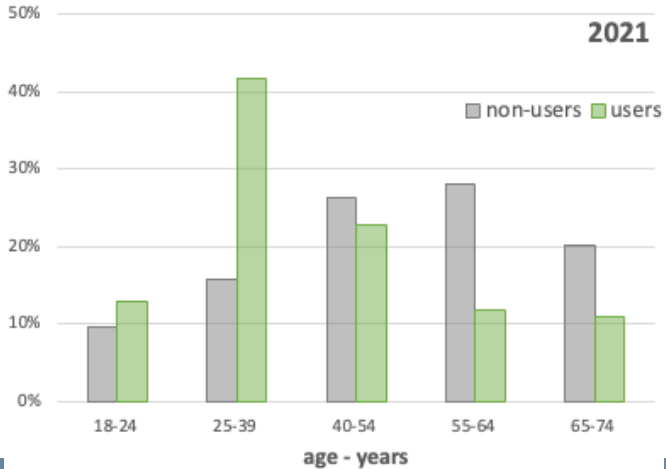
- 47% *current* users
 - 53% *current* non-users
- in both years

GENDER

- More males are users

AGE

- 25–39yo = highest % users
- 55–64yo = on the rise in 2022



US adult national sample; distribution reflected most recent national census

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2021 & 2022 – Why? What? When?

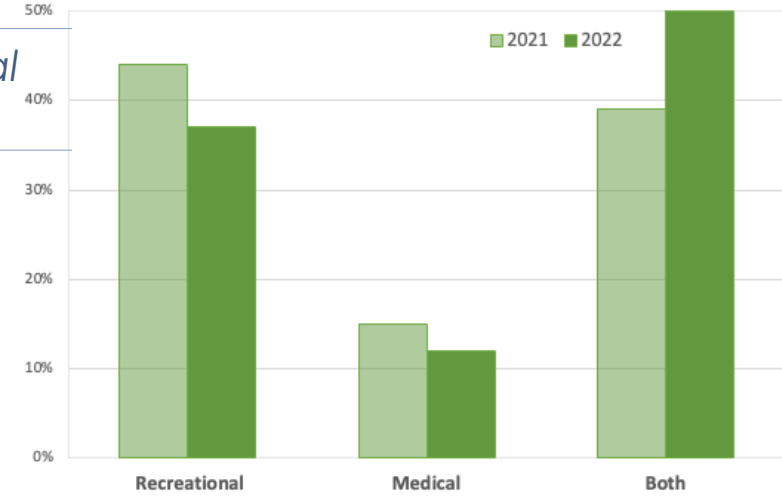
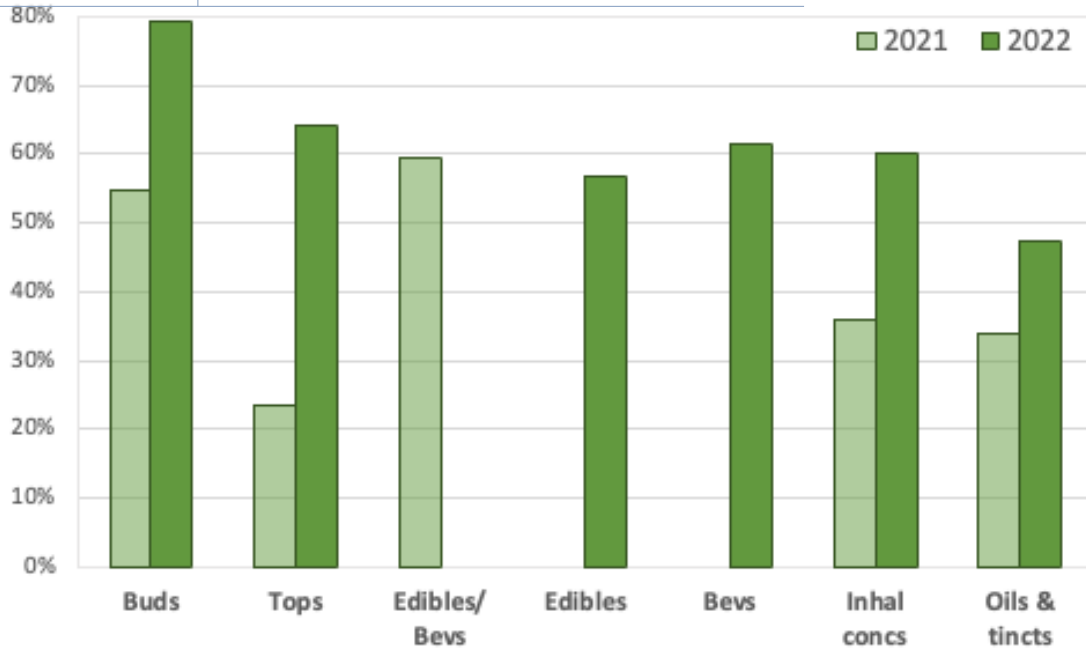


WHAT?

- 2021: edibles & buds
- 2022: buds, topicals, inhalable concentrates, oils & tinctures

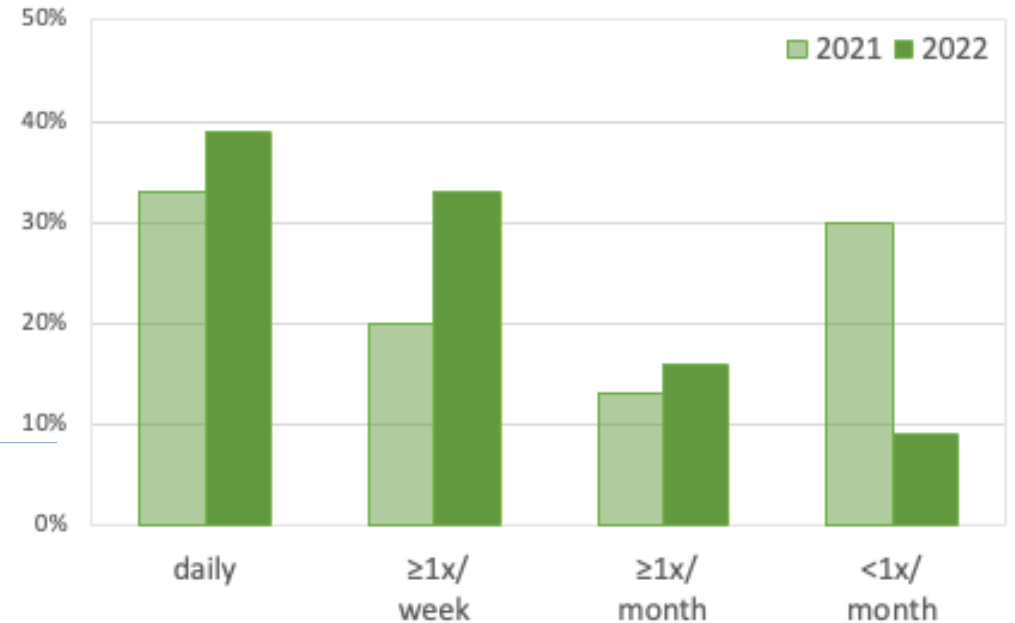
WHY?

- 2021: recreational
- 2022: both



WHEN?

- 2021: < once / month
- 2022: daily & > once / week



TAKEAWAY

**CONSUMERS ARE
DYNAMIC**
Consumers change,
product space evolves



MAX DIFF SCALING

IDENTIFYING THE DRIVERS

What is the most important when choosing cannabis products & least important

Most Important		Least Important
<input type="checkbox"/>	Safe	<input type="checkbox"/>
<input type="checkbox"/>	Reliable	<input type="checkbox"/>
<input type="checkbox"/>	Premium	<input type="checkbox"/>
<input type="checkbox"/>	Effective	<input type="checkbox"/>

IMPLICIT ASSOCIATION TEST

UNCOVERING PERCEPTIONS

DOES THIS WORD MATCH THE FORMAT?
Prompt: "The format is..."



Top Drivers for Use

USERS

- 1 Safe
- 2 Effective
- 3 Reliable
- 4 Premium
- 5 Potent



QUALITY EFFECT:
I WANT A QUALITY PRODUCT
THAT I CAN FEEL WORKING

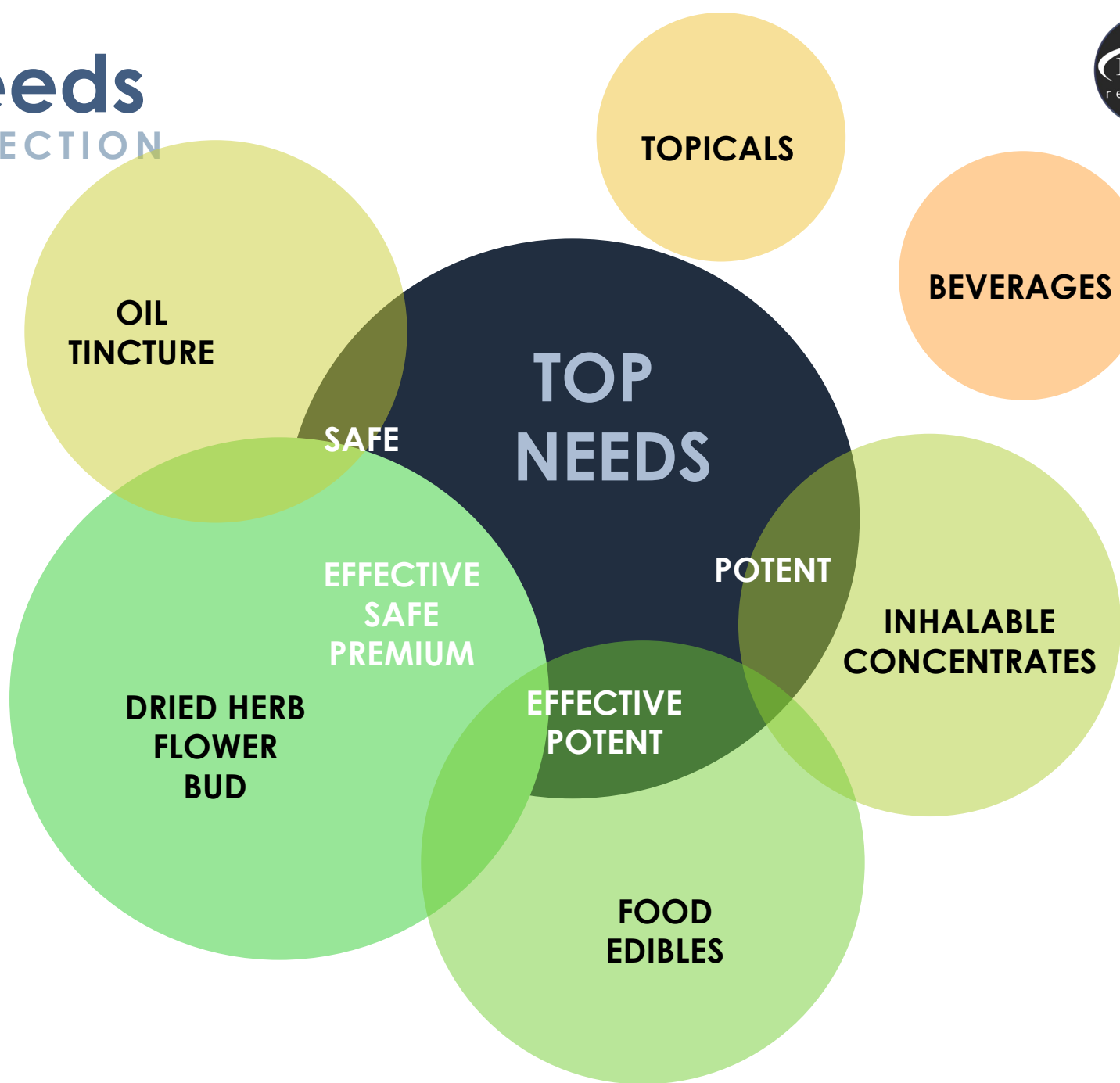
User Unmet Needs

PERCEPTIONS PROVIDE DIRECTION



ALL FORMATS ARE NOT PERCEIVED EQUALLY

Opportunity to create products that meet the top needs in formats like topicals or beverages



Top Drivers for Use Consideration

NON-USERS

- 1 Safe
- 2 Effective
- 3 Healthy
- 4 Reliable
- 5 A treatment
- 6 Recommended by a medical professional



STIGMATIZED HEALTH HALO:

I WANT A SAFE PRODUCT TO HELP
ME ON MY WELLNESS JOURNEY

TAKEAWAY

UNIVERSAL DRIVERS
Efficacy & Safety



Behaviorally Driven

HCD'S PATHWAY
FOR PRODUCT
PIPELINES &
INNOVATION



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1 IDENTIFY DRIVERS
YOUR CONSUMERS' TOP NEEDS
IN THE PRODUCT CATEGORY

1

2

IDENTIFY INNOVATION
THROUGH EXAMINING NEED GAPS &
WHITE SPACES

3

EXPLORE HABITS
HABIT LOOPS AND LIFESTYLES

4

HARMONY
DOES THE PRODUCT MEET
THE PROMISE?

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HCD X ASTM

A universal symbol for intoxicating cannabinoid products



CHECK OUT THE INFOGRAPHIC

