Behind The Data: How Essential Businesses Are Adapting
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Agenda

✔ Sales & Consumer Trends During COVID-19
✔ Massive Shift to eCommerce & Delivery
✔ Adjusting Operational Protocols
✔ Resources Available
HEADSET’S ECOSYSTEM & DATA METHODOLOGY

INSIGHTS
Real-time competitive intelligence for the cannabis industry. Monitor the competitive landscape, identify opportunities, and stay ahead of industry trends as never before.

RETAILER
Retail data intelligence for retailers and dispensaries to stay ahead of trends and discover opportunities like never before. Real-time dashboards on your Sales, Inventory, Vendors, Products and Budtenders.

BRIDGE
Vendor-Retailer Intelligence. The connection to a collaborative relationship. Limit out-of-stock events, ensure optimal inventory levels and enhance forecasting abilities.

Data is collected from participating retailers’ POS systems – there are currently over 700 connected retailers.

1. Data is aggregated, anonymized, and normalized then combined with government and stock market data.

2. Machine Learning Algorithms help to normalize the disparate product catalogs each retailer keeps.

3. Data Entry Specialists categorize products and assign metadata including product traits.

4. Retailer data is cleansed to reduce noise and skew; inferential statistics methods are applied to the sample.

5. Headset’s algorithms use the data from retailers and other sources to project sales totals.

6. Insights are delivered to the retailer for decision-making.
ADULT USE CANNABIS SALES (2019)

BY MARKET IN LOCAL CURRENCY

- CA: $2.8B
- CO: $1.4B
- NV: $0.6B
- OR: $0.7B
- WA: $1.1B
- AB (Alberta): $0.2B
- BC (British Columbia): $0.08B
- ON (Ontario): $0.2B
LIFE IN 2020 WAS VERY PREDICTABLE
THEN THERE WAS COVID-19...
This graph displays the median index of sales (compared to sales for same weekdays in February). We see that sales volumes dramatically increased between March 13 and March 20.
MARCH SALES ARE AFFECTED
HAS PRODUCT PREFERENCE CHANGED?

2020-02-19:
- Vapor Pens 22%
- Flower 43%
- Pre-Roll 10%
- Tincture & Subling 1%
- Capsules 1%
- Concentrates 9%
- Topical 1%
- Edible 11%

2020-03-18:
- Vapor Pens 21%
- Flower 45%
- Pre-Roll 7%
- Tincture & Subling 1%
- Capsules 1%
- Concentrates 8%
- Topical 1%
- Edible 14%
CHANGE IN AVERAGE DAILY SALES BY CATEGORY (US)
COVID-19 BASKET SIZE BY GENERATION

- Generation Z: $38.67
- Millennials: $38.81
- Generation X: $41.78
- Baby Boomers: $35.48

Average Basket:
- Generation Z: $27.57
- Millennials: $31.33
- Generation X: $33.82
- Baby Boomers: $31.59

Basket Size Increase:
- Generation Z: 23.9%
- Millennials: 23.5%
- Generation X: 12.3%
MARKET SHARE BY GENERATION
(2019 VS COVID-19 STOCKUP WEEKEND)
Get Involved: We Can Do More Together!

1. CCIA Website & Resources
2. Daily Updates Blog from Headset
3. Blaze Blog & Webinar

Questions?