The logo of the California Cannabis Industry Association is a circular emblem. The outer ring contains the text "CALIFORNIA CANNABIS" at the top and "INDUSTRY ASSOCIATION" at the bottom. The center features a stylized cannabis leaf. Below the leaf is a banner that reads "EST. 2013".

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



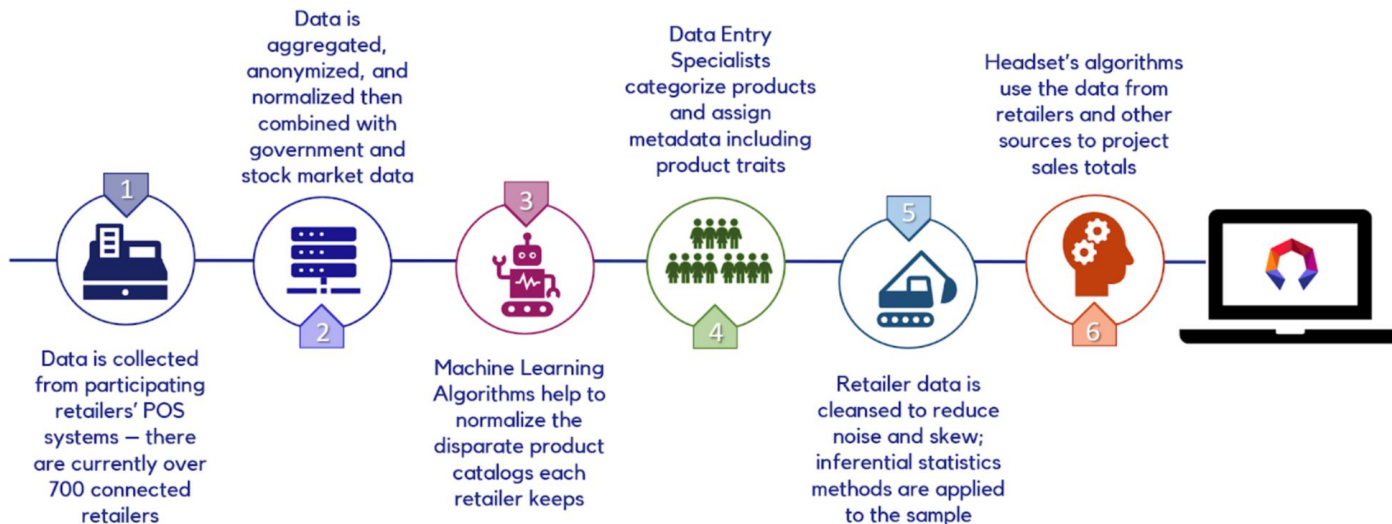
Real-time competitive intelligence for the cannabis industry. Monitor the competitive landscape, identify opportunities, and stay ahead of industry trends as never before.



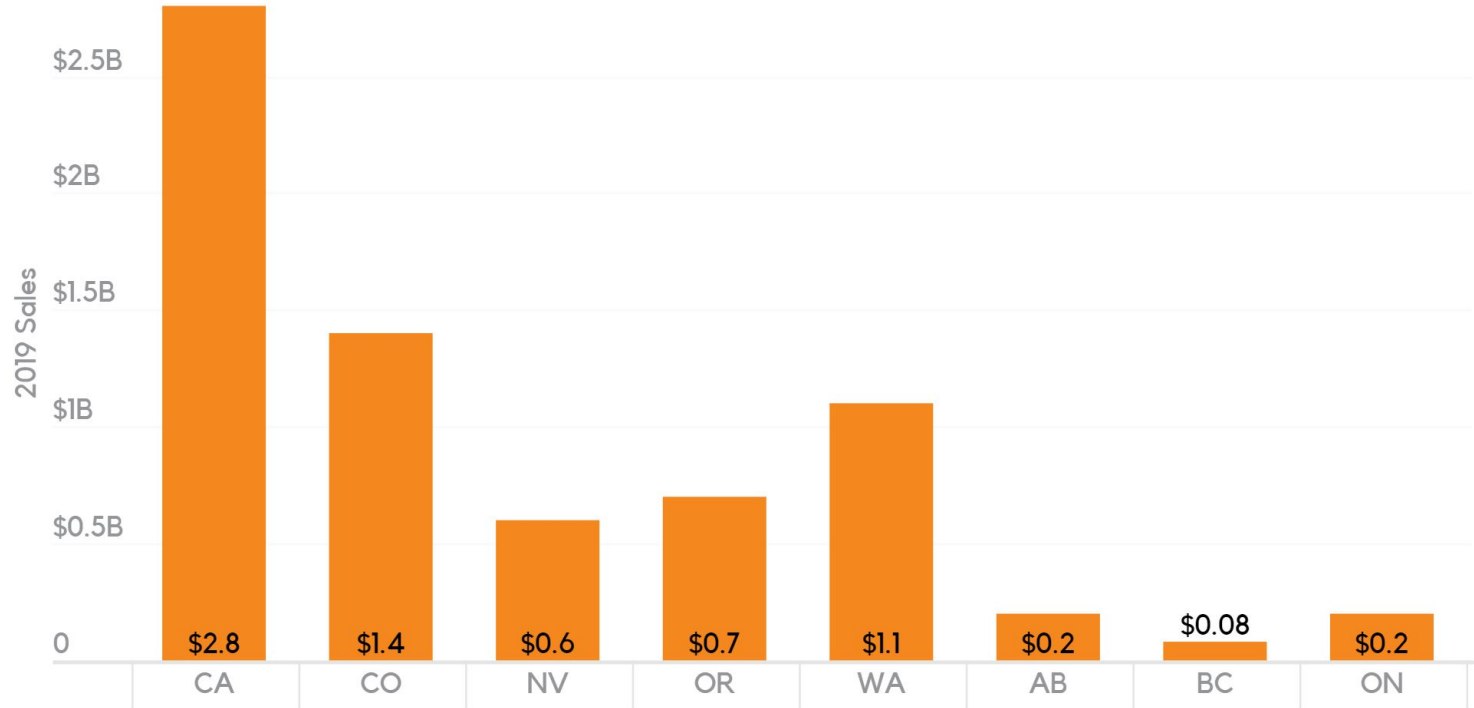
Retail data intelligence for retailers and dispensaries to stay ahead of trends and discover opportunities like never before. Real-time dashboards on your Sales, Inventory, Vendors, Products and Budtenders.



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

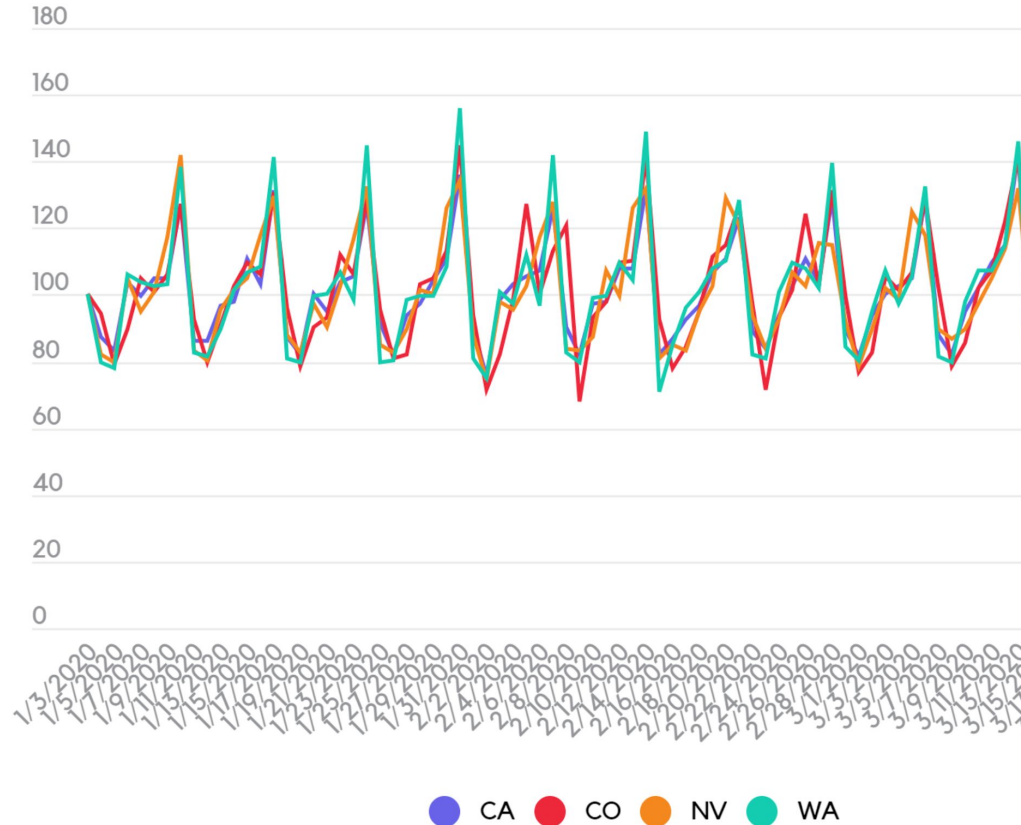


ADULT USE CANNABIS SALES (2019)

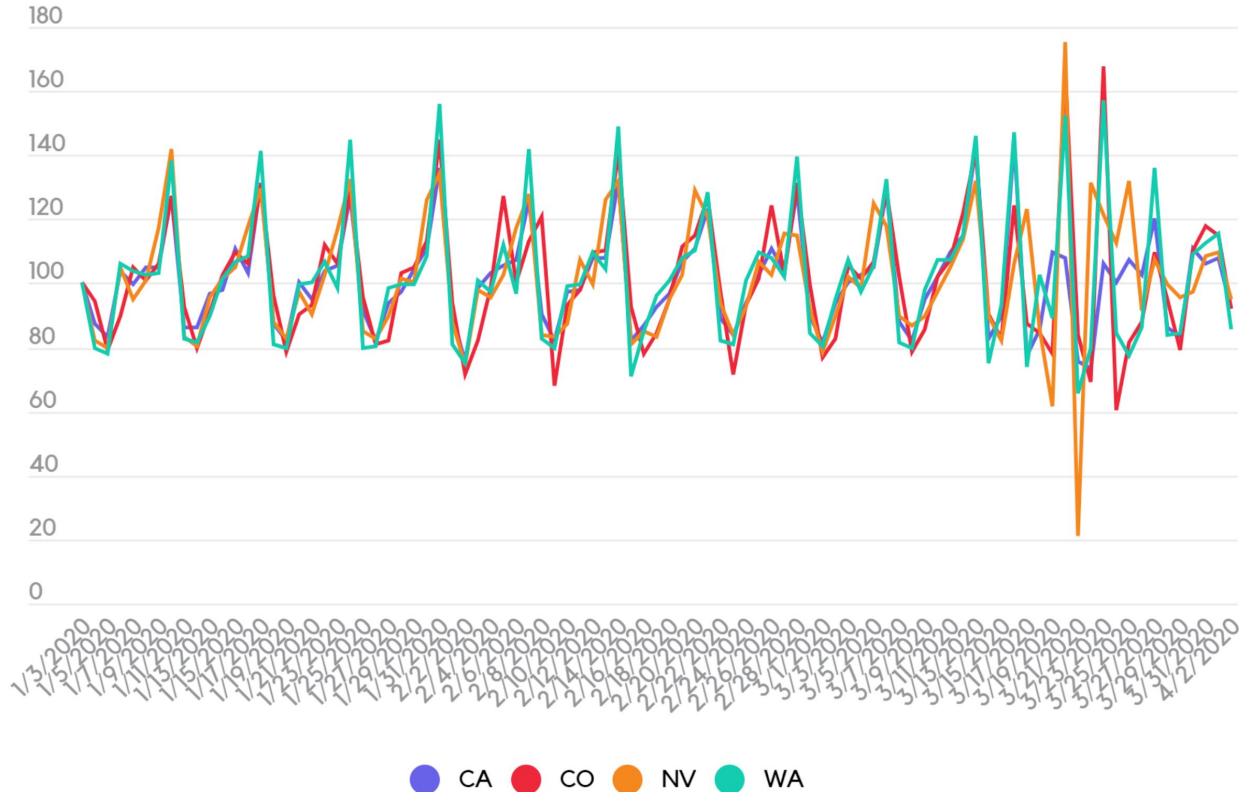


BY MARKET IN LOCAL CURRENCY

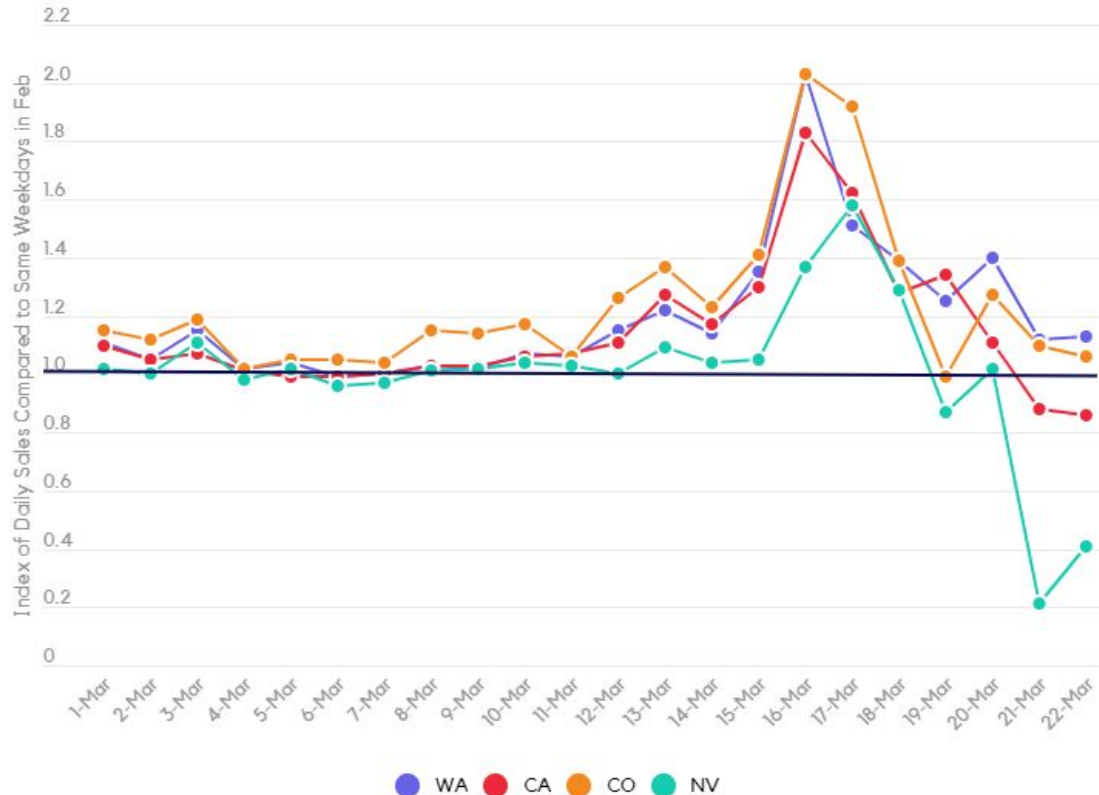
LIFE IN 2020 WAS VERY PREDICTABLE



THEN THERE WAS COVID-19...



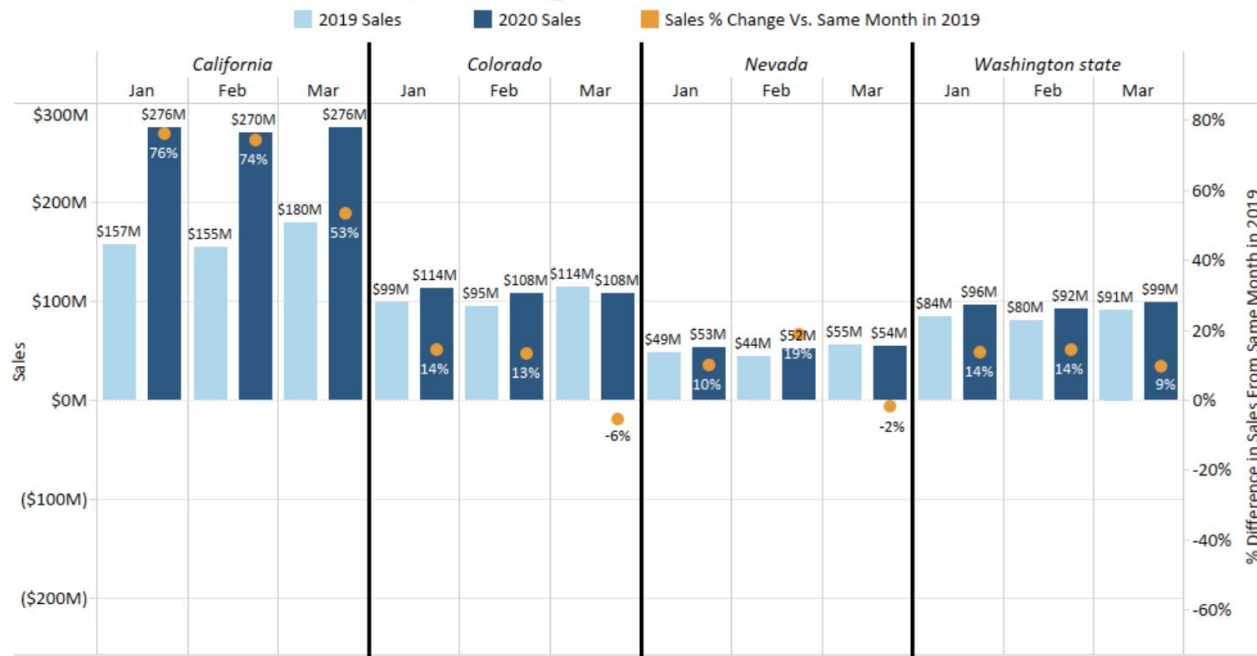
CORONAVIRUS IMPACT ON SALES



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

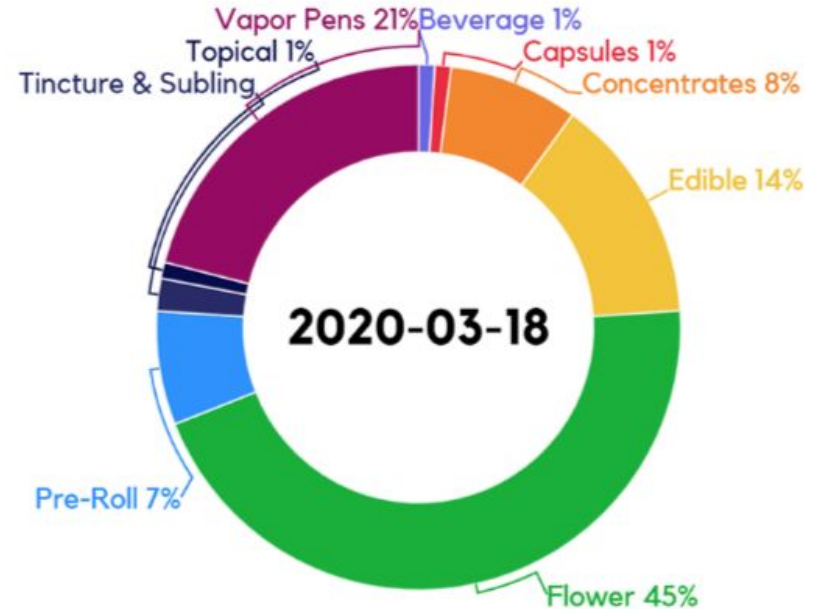
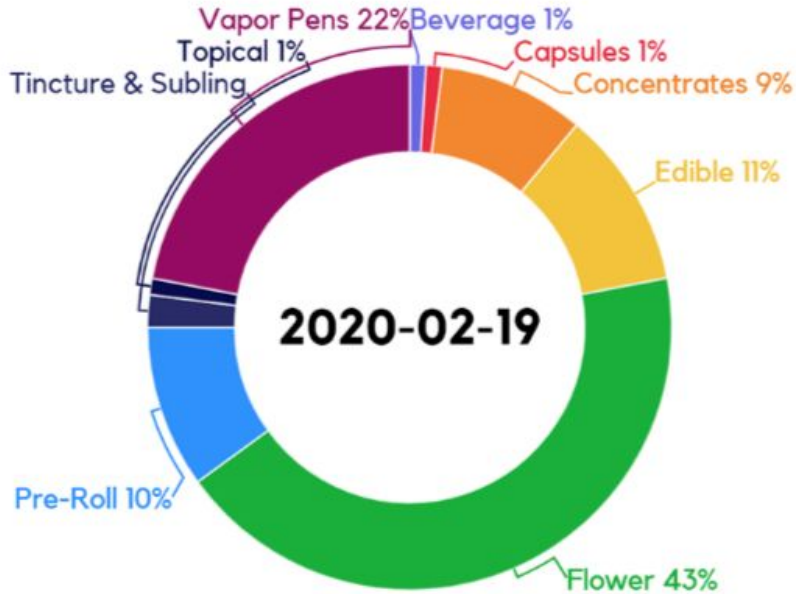
**Adult-Use Cannabis Sales by Month and Market:
Percent Change Vs. Same Month in 2019**



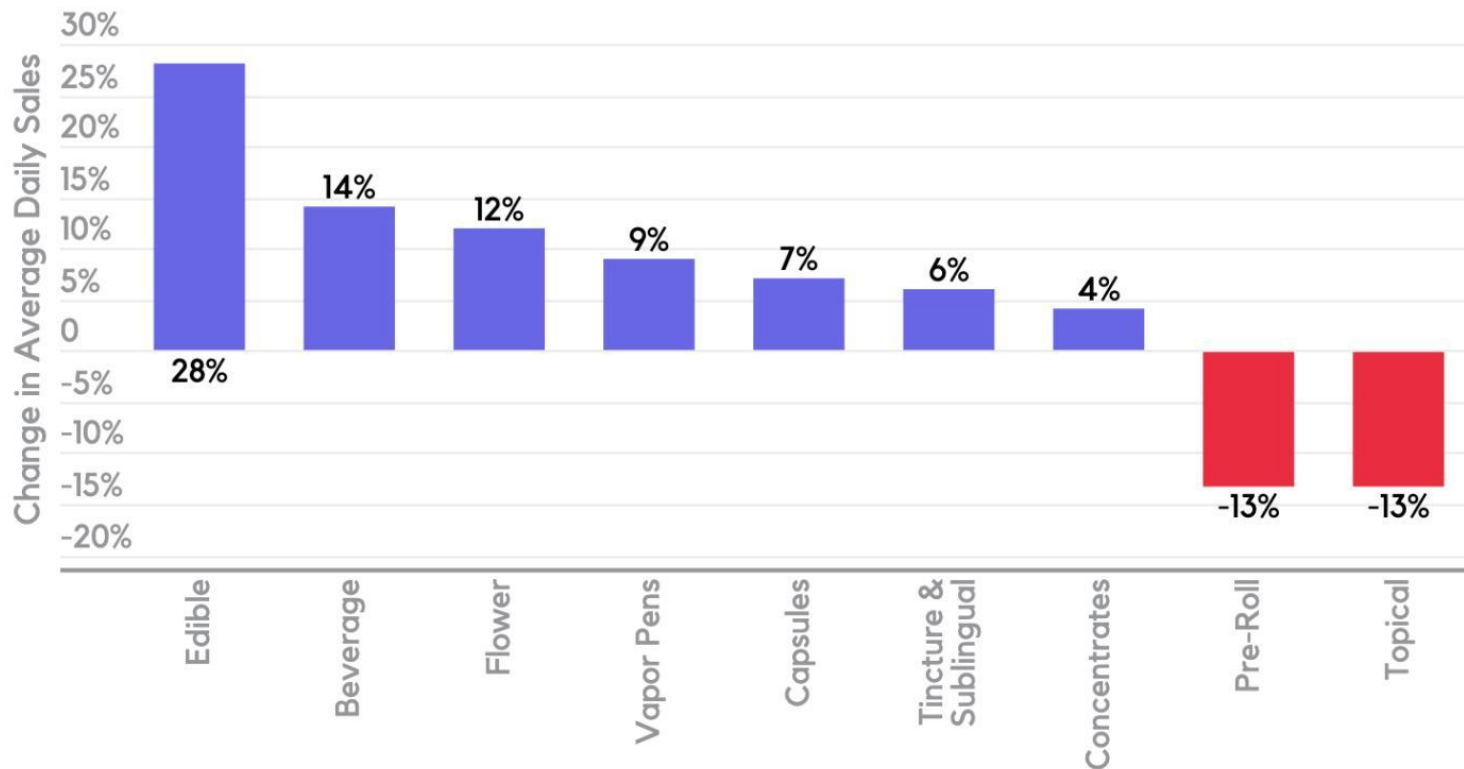
Source: Headset

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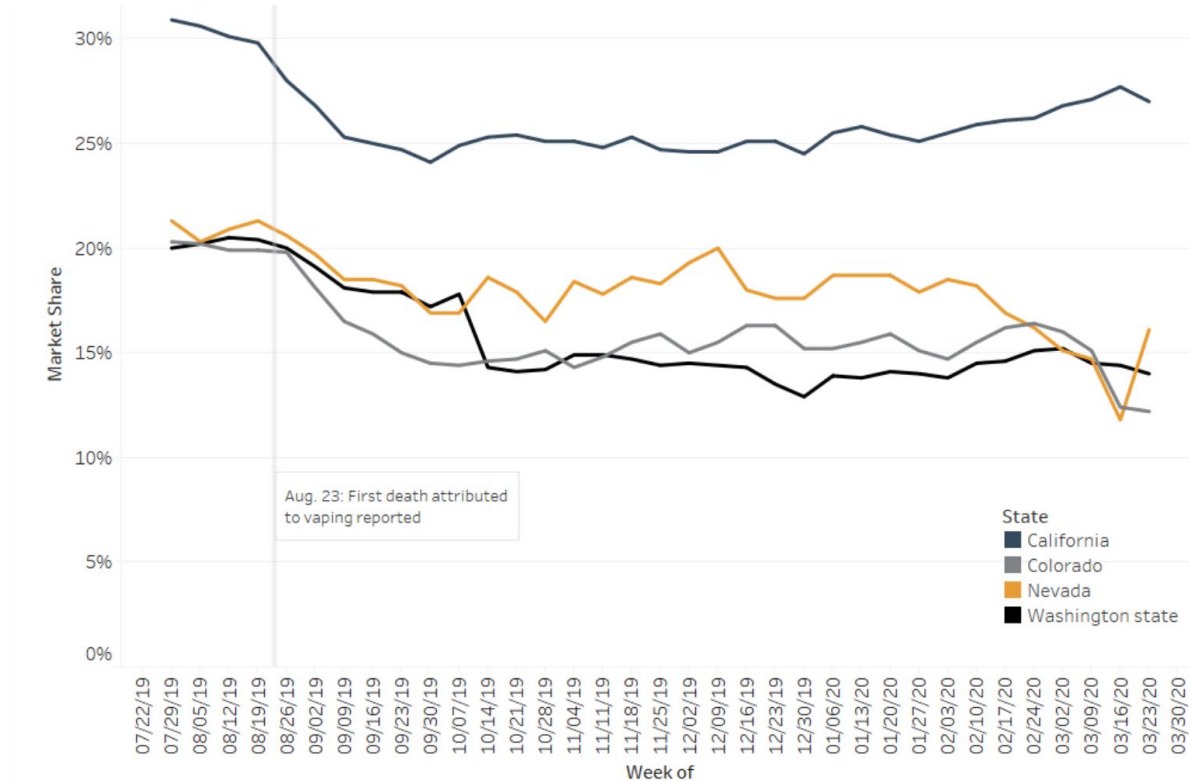
HAS PRODUCT PREFERENCE CHANGED?



CHANGE IN AVG DAILY SALES BY CATEGORY (US)



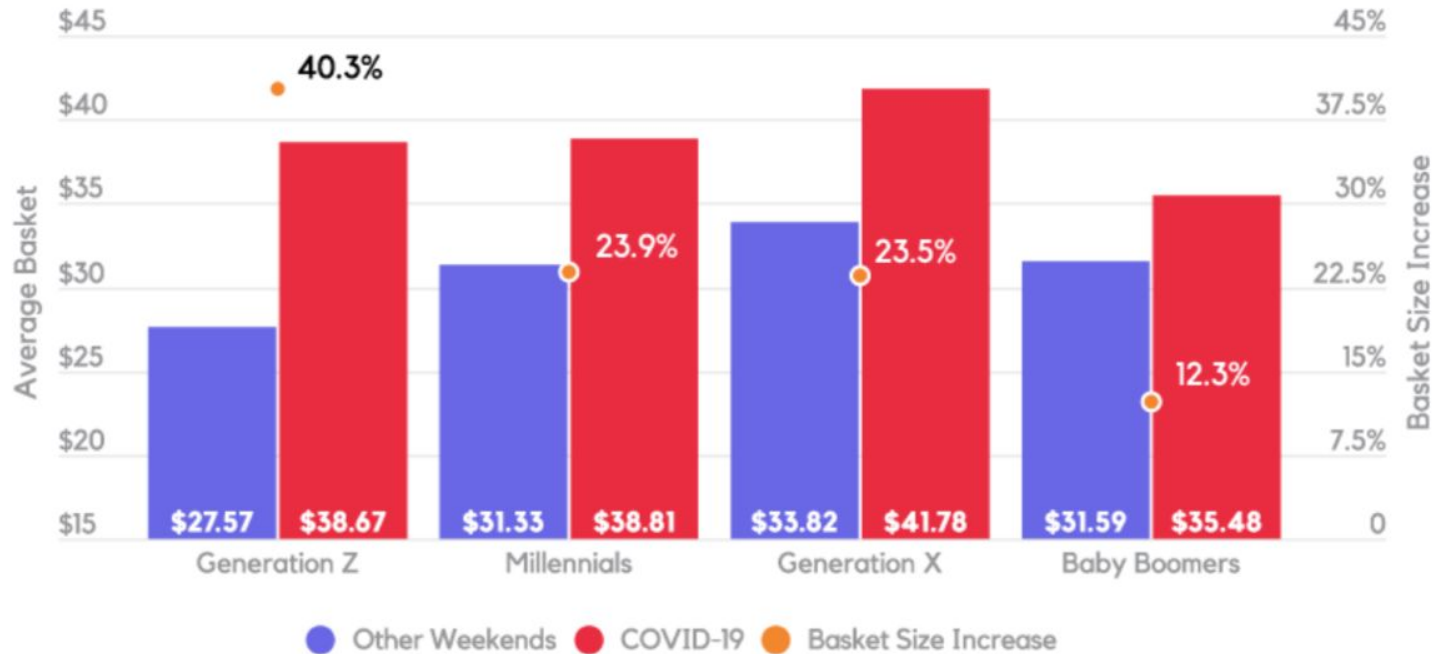
VAPE MARKET SHARE FROM VAPITO COVID-19



Source: Headset.

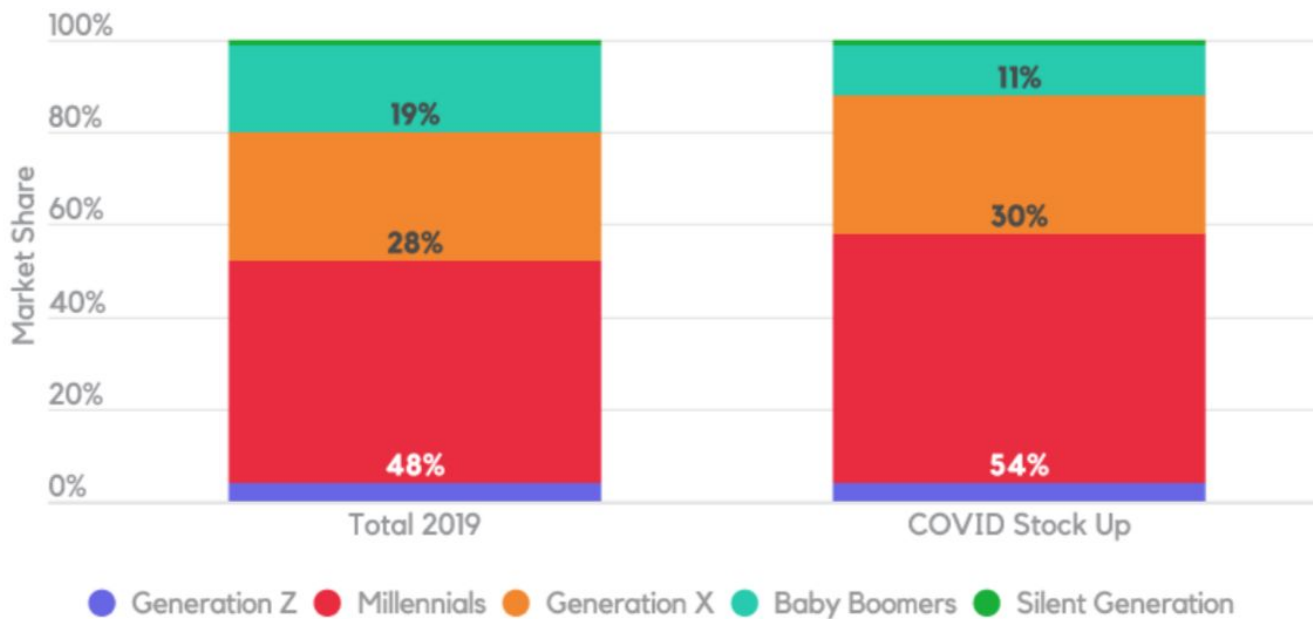
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COVID-19 BASKET SIZE BY GENERATION



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?