FORDIS CONSULTING
Illuminating Market Research

Colorado Cannabis, Hemp & CBD

What draws shoppers in, and what brands should test next

Consumer insights from the Buy Colorado Day Evaluation. This report covers discovery, brand familiarity, product interest, and ways to build on the findings in 2027 and beyond.

24%

Category discovery

107 of 446 selected the category for discovering new brands.

86%

Offer consideration

92 of 107 category respondents selected at least one tested brand.

60%

First-purchase potential

64 of 107 selected a tested brand they had never bought.

5 tested brands. The offer was hypothetical: listed products at least 50% off on March 3. Use the results to guide research, not to forecast sales at regular price.

Learn more about Buy Colorado Day

Where the opportunity is

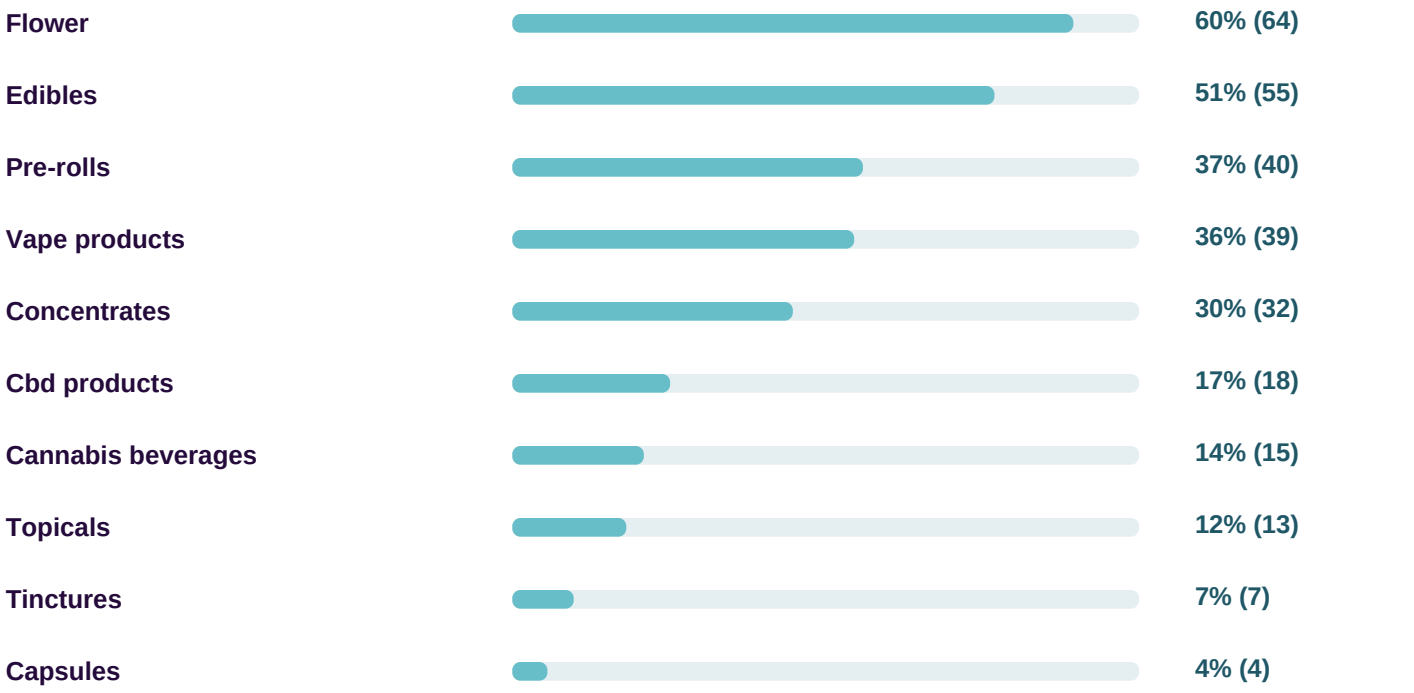
Use these findings to decide whom to study, which product to feature, and what to validate before investing.

Category interest is not brand awareness	107 of 446 respondents selected this category for discovery. In that group, 77 had never heard of at least one tested brand. Across all 535 brand ratings, 44% were unfamiliar. **Decision: Introduce the product and the brand rather than assuming category interest is enough.**
There are two ways to earn a first purchase	36% considered a familiar brand they had never bought, and 35% considered a brand they had never heard of. These groups overlap. **Decision: Test a straightforward product introduction separately from a reason-to-try message.**
The product shortlist	Flower ranked first at 60%. Edibles followed at 51%. Use that gap as context for shortlisting products, not as a prediction of revenue. **Decision to explore: category literacy and label comprehension.**
Check what lasts beyond an offer	47% of selected respondent–brand pairs were past buyers. That is a different opportunity from introducing the brand to new shoppers. **Decision: Measure first-time and repeat orders separately in any subsequent pilot.**

Q4 n=446; Q12 and Q26 category base n=107; Q26 × Q29, matched at respondent level.

What shoppers wanted to see featured

Share of the 107 category respondents selecting each product type at 50% off or more. Multiple selections were allowed.



WHAT IT MEANS FOR A BRAND

Flower can be a starting point if it fits the range. Test a product people can understand quickly. Ask what people correctly infer and where the wording confuses them, without testing consumption encouragement.

Q12, category base n=107. Product-type interest is not a preference for individual products or prices.

Discovery and first purchase are different jobs

The first table counts individual people. The second counts respondent–brand ratings, so one person can contribute multiple ratings.

Among category respondents	People	Share
Considered at least one tested brand	92 / 107	86%
Considered at least one tested brand never bought	64 / 107	60%
Considered a familiar brand never bought	38 / 107	36%
Considered an unfamiliar brand	37 / 107	35%

The last two groups overlap: 11 respondents did both.

Prior brand relationship	Ratings	Selected	Rate
Unfamiliar	233	59	25%
Aware nonbuyer	145	45	31%
Past buyer	157	93	59%

WHAT IT MEANS FOR A BRAND

Keep brand discovery, first purchase, and retention separate when setting objectives. The same shopper can be new to one brand and already buy another. A single combined rate hides that difference.

Q26 × Q29. The lower table pools 535 ratings across 5 brands. Rates use the relationship group as the denominator.

Compare starting points, not just ranks

Overall consideration uses all 446 survey respondents. The other columns use the category or relationship group shown.

Brand	Overall	Unfamiliar share	Unfamiliar rate	Aware nonbuyer rate	Past buyer rate
Social Dispensary	12.3% (55)	47%	38% (19/50)	58% (18/31)	69% (18/26)
Wana Brands	9.6% (43)	34%	22% (8/36)	26% (6/23)	60% (29/48)
Keef Brands	7.6% (34)	32%	18% (6/34)	18% (6/34)	56% (22/39)
Spherex	7.4% (33)	54%	21% (12/58)	35% (8/23)	50% (13/26)
Charlotte's Web	7.2% (32)	51%	25% (14/55)	21% (7/34)	61% (11/18) *

* A subgroup smaller than 20; use as directional only. Unfamiliar share is the share of the category base that had not heard of the brand.

Discovery example	Social Dispensary: 19 of 50 respondents unfamiliar with the brand considered it. This is a research lead, not a sales forecast.
First-purchase example	Social Dispensary: 18 of 31 respondents who knew it but hadn't bought it considered it. This is a research lead, not a sales forecast.
Repeat-purchase example	Social Dispensary: 18 of 26 past buyers considered it. This is a research lead, not a sales forecast.

Q26_1–Q26_5 and Q29. Multiple brands could be selected. Small differences are not treated as meaningful rankings.

Use audience patterns to design tests

Age comparisons are descriptive. Brand overlap can generate ideas, but selecting two brands did not mean a shopper would buy them together.

Age breakdowns are omitted here because the report focuses on the category's overall adult research audience and the age groups are not an eligibility check.

Brands considered by some of the same people

Pair selected by the same respondent	Count
Social Dispensary + Wana Brands	28
Social Dispensary + Spherex	26
Charlotte's Web + Social Dispensary	20

WHAT IT MEANS FOR A BRAND

Use overlap to decide which alternative to include in a follow-up study. Ask what shoppers buy today and why. A shared audience does not establish a competitive switch, bundle opportunity, or joint purchase.

Q1 × Q4, Q12, Q29. Co-selection uses the full n=446 base. Group-level observations are not population estimates.

Category literacy and label comprehension

Here are three ways to build on the survey. They can inform decisions even if a brand does not participate in Buy Colorado Day.

1. Identify what matters	Use neutral materials with eligible adults to test whether product types and labels are understood. **Outcome: a clearer hypothesis about what shoppers need to see or understand.**
2. Test before investing	Ask what people correctly infer and where the wording confuses them, without testing consumption encouragement. **Outcome: a focused recommendation on which version merits a larger test.**
3. Validate with your own data	Review research materials with the appropriate team and report comprehension separately from stated consideration. **Outcome: an evidence-based decision on what to expand, revise, or stop.**

KEEP THE SURVEY AND THE TEST DISTINCT

Compare alternatives with the audience, product, and price defined in advance. For any live pilot, separate stated interest from observed outcomes and track the measure that matches the decision.

Lara Fordis | Fordis Consulting

Book 20 minutes to discuss how existing and new research could support your growth decisions.

Email Lara Fordis to book 20 minutes

How to read the numbers

Buy Colorado Day Evaluation: 446 respondents. The Cannabis, Hemp & CBD analysis focuses on the 107 respondents who selected this category in Q4.

Q4 | Category discovery	In which of the following categories are you most interested in discovering new brands? (Select 3-6)
Q12 | Product types	Which types of products within the Cannabis, Hemp & CBD (21+) category would you most want to see listed on Buy Colorado Day at 50% off or more? (Select up to 3)
Q26 | Brand relationship	Which of the following best describes your experience with the following brands in the Cannabis, Hemp & CBD category? (Select one answer per brand)
Q29 | Consideration	Suppose each brand below participated in Buy Colorado Day and every product it listed on Buy Colorado Day was at least 50% off on March 3. Which, if any, brands would you consider purchasing from?
How we calculated the shares	Overall brand rates use all 446 respondents. Category and product counts use 107; relationship rates use the stated subgroup. Brand ratings and selections were joined by respondent. Multi-select percentages can sum to more than 100%.
What the survey did not measure	These results describe the sample. It did not measure actual purchases, discount lift, product-level preferences, or purchase intent at regular price, and does not establish a representative statewide estimate.

Additional inputs: Q1 for age bands. All percentages are unweighted and rounded.