



sweed

**The 2025 Cannabis
Shopper
Experience Report
by Sweed**

The New Cannabis Consumer Era

The cannabis industry has officially entered its next chapter. One defined not by novelty, but by normalization. What was once a niche market has become an integral part of everyday life for more than half of U.S. adults, spanning generations, lifestyles and family types. Cannabis consumers today are diverse, informed, and expect the same ease, personalization, and digital convenience they experience everywhere else, from online retail to restaurants and beauty.

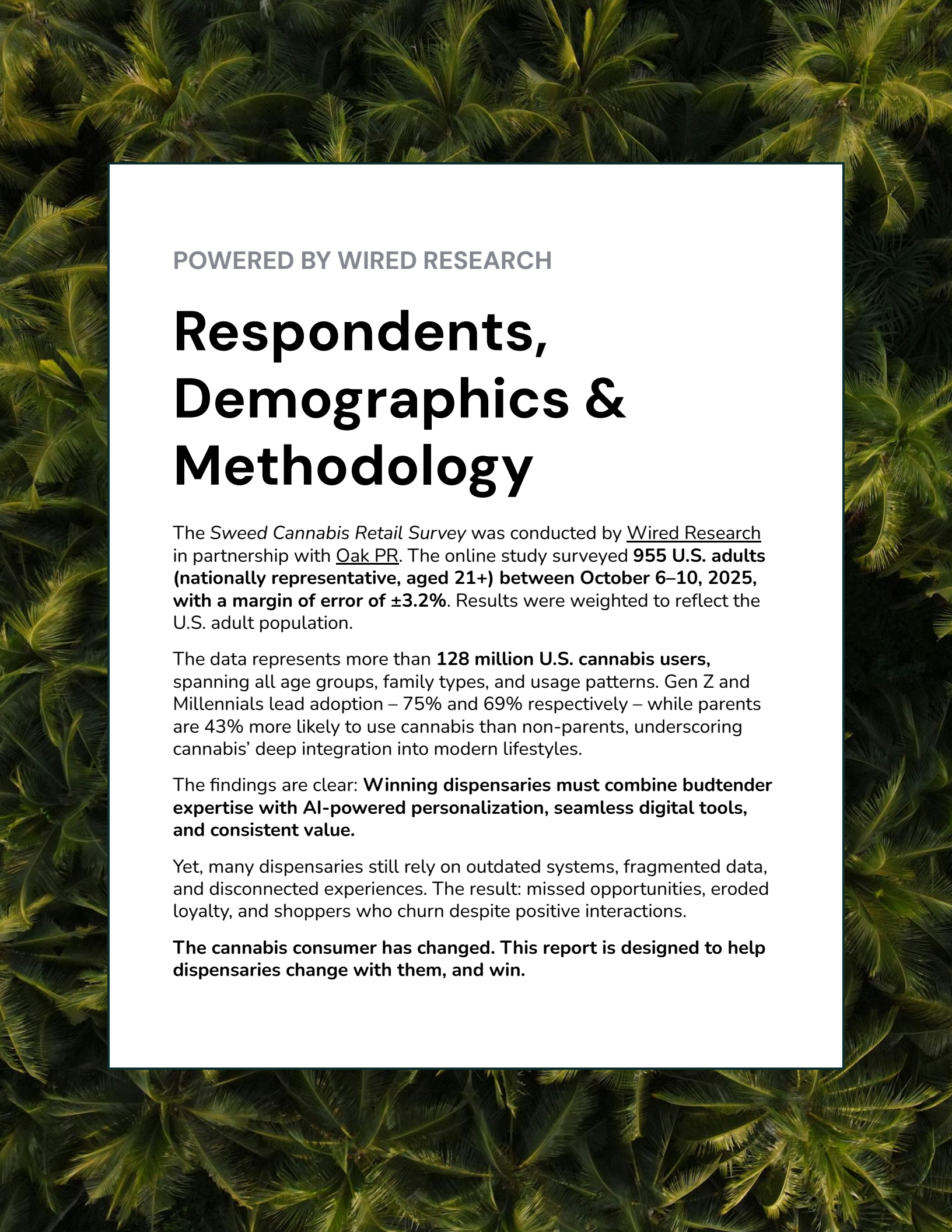
This survey arrives at a critical moment for cannabis retail. As regulations stabilize and competition accelerates, dispensaries face growing pressure to deliver experiences that match the sophistication of their shoppers. The 2025 Sweed Consumer Insight Report explores what modern cannabis customers value most – expertise, efficiency, and personalization – and reveals how dispensaries can close the widening gap between consumer expectations and operational realities.

The findings are clear: *the cannabis consumer has evolved, but many dispensaries haven't caught up.*

- **Personalization drives loyalty:** 86% of shoppers would return to a dispensary offering tailored recommendations.
- **Digital ease shapes purchasing:** 75% want one-click reordering, 72% want to pre-order online, and 67% say delivery options are essential.
- **Budtenders still matter deeply:** 88% buy through dispensaries, and 76% say budtender expertise directly influences what they purchase.
- **Price and promotions still rule behavior:** 89% are more likely to be repeat customers if pricing is competitive, and 77% say promotions determine where they shop.

In short: *today's cannabis shopper expects the sophistication of Apple, the personalization of Amazon, and the trust of a local boutique. All from their local dispensary.*





POWERED BY WIRED RESEARCH

Respondents, Demographics & Methodology

The *Sweed Cannabis Retail Survey* was conducted by Wired Research in partnership with Oak PR. The online study surveyed **955 U.S. adults (nationally representative, aged 21+) between October 6–10, 2025, with a margin of error of $\pm 3.2\%$** . Results were weighted to reflect the U.S. adult population.

The data represents more than **128 million U.S. cannabis users**, spanning all age groups, family types, and usage patterns. Gen Z and Millennials lead adoption – 75% and 69% respectively – while parents are 43% more likely to use cannabis than non-parents, underscoring cannabis' deep integration into modern lifestyles.

The findings are clear: **Winning dispensaries must combine budtender expertise with AI-powered personalization, seamless digital tools, and consistent value.**

Yet, many dispensaries still rely on outdated systems, fragmented data, and disconnected experiences. The result: missed opportunities, eroded loyalty, and shoppers who churn despite positive interactions.

The cannabis consumer has changed. This report is designed to help dispensaries change with them, and win.

A background image of cannabis leaves, with some leaves in sharp focus on the left and others faded in the background.

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ABOUT THIS REPORT: FROM INSIGHTS TO ACTION

The Cannabis Revenue Optimization Flywheel

This report isn't just a data dump, *it's a roadmap*. Each section connects consumer data to **Sweed's Cannabis Revenue Optimization Flywheel**, a proven framework for building growth-ready cannabis retail operations.



Through this model, readers will see how each consumer insight translates into a dispensary strategy, paired with Sweed-powered solutions that make it achievable in real time. From AI-driven product recommendations to omnichannel loyalty programs, Sweed helps operators adapt to today's shoppers, increase retention, and build the dispensary of the future.

Grow Your Reach



What Drives Awareness and Choice? How Do Consumers Discover Where to Shop?

In today's cannabis landscape, visibility and trust are everything. Consumers have endless options, but the path to discovery still starts close to home. *Most shoppers make their dispensary decisions based on proximity, community, and personal connection*, proof that even as digital tools evolve, local relevance remains the heartbeat of cannabis retail.

When asked what influences where they shop:

74%

Of shoppers say **location** is the top factor when choosing a dispensary.

78%

Prefer to shop at **stores with a local presence** reflecting the importance of community involvement.

41%

Discover new dispensaries through **word of mouth referrals**, showing that personal recommendation still outperforms paid ads in driving first-time visits.

For dispensaries, this means *reach* isn't just about being seen, it's about being seen by the right customers, in the right place, with the right message.

Turning local discovery into measurable growth: As shoppers look for convenience and connection, dispensaries that combine localized marketing with digital intelligence gain an edge.

Sweed In Action

Local-First Marketing Tools

Promote in-store events, neighborhood offers, and community partnerships with precision.

Referral Programs + QR Receipts

Transform every action into a word-of-mouth opportunity by rewarding customer advocacy.

Geo-Targeted Campaigns via Intent-Based Tools

Reach shoppers actively searching for dispensaries or products you carry, maximizing ad efficiency and ROI.

Elevate the Experience



What Do Shoppers Want When They Step Inside or Go Online?

The cannabis shopping experience has evolved from curiosity-driven browsing to purpose-driven exploration. Today's shoppers come prepared with specific goals, questions, and expectations for how the experience should feel. Whether they're online or in-store, they want freedom to explore, reliable guidance when needed, and confidence in the choices they make.

The data tells a clear story:

60%

Of shoppers say they **prefer to browse on their own first** before engaging a budtender.

71%

Say **product education** directly impacts what they buy.

49%

Feel **overwhelmed by too many product choices**, highlighting the need for intuitive, curated experiences that reduce friction.

For dispensaries, the new customer experience standard isn't just about speed or service, it's about empowerment. The best retailers are those that make shopping both self-guided and smart, balancing autonomy with intelligent support when it matters most

Bridging choice and clarity with technology: The modern dispensary must function like an educator, concierge, and eCommerce powerhouse all at once. The challenge? Delivering that level of sophistication at scale, without adding staff burden or operational complexity.

Sweed In Action

AI Product Suggestions

Offers smart, conversational recommendations based on preferences, past purchases, and current trends, helping shoppers make confident decisions.

Smart Search and Filtering

Simplifies product discovery across menus and devices, helping customers find what they want without feeling overwhelmed.

Personalized Recommendations Tied to Loyalty and Browsing History

Connects data across touchpoints so returning shoppers see exactly what resonates with them.

Speed Up Sales



How Do Consumers Prefer to Shop and Check Out?

In cannabis retail, speed isn't just a convenience, it's a competitive advantage. Shoppers have grown accustomed to seamless checkout experiences across every industry, and they now expect the same from their dispensaries. Whether they're browsing online, placing an order for pickup, or buying in-store, the ability to shop quickly and confidently is what turns a visit into a habit.

The data reinforces this shift toward efficiency-driven retail:

43%

Of shoppers prioritize **speed and ease** as the top factor in their buying experience.

68%

Say a **simple, clear online menu** is critical when deciding where to shop.

39%

Say **express pickup options** directly influence their choice of dispensary.

In short: the modern cannabis consumer values their time as much as their product. Every unnecessary click, delay, or checkout hiccup risks turning a loyal customer into a lost sale.

The new standard — fast, frictionless, and flexible: Speed no longer means sacrificing personalization, it means integrating it seamlessly. The fastest-growing dispensaries are those that use smart technology to streamline the buying process, connect loyalty seamlessly at checkout, and ensure customers always know what's available in real time.

Sweed In Action

Easy Online Ordering

Streamlined, intuitive eCommerce that lets shoppers browse, select, and purchase in seconds, whether they're at home or on the go.

Loyalty Integration at Checkout

Automatically applies points, discounts, and offers without slowing down transactions, turning every sale into a relationship.

Inventory That Reflects Real-Time Availability

Ensures customers see real-time availability, reducing disappointment and streamlining operations.

Fulfill with Confidence



What Earns Long-Term Trust and Return Visits?

For cannabis consumers, the sale doesn't end at checkout, it's just the beginning of the relationship. Trust is built (or broken) in the moments that follow: when the order is ready, when updates arrive, and when the experience feels as smooth as it was promised. In a market where customers have endless options, fulfillment and communication are no longer back-end operations, they're loyalty drivers.

The data is clear:

47%

Of shoppers say **order accuracy** is the top factor in whether they'll return.

61%

Want to see **their loyalty points** and **purchase history** clearly across every channel.

3 in 4

Expect **mobile-friendly communication** about their orders, including confirmations, notifications, and personalized updates.

For dispensaries, consistency across these touchpoints builds the kind of reliability that keeps customers coming back. When fulfillment runs smoothly and communication feels effortless, trust grows, and so does revenue.

From transaction to trust – The Sweed approach: True fulfillment confidence comes from integration. When systems, staff, and customers all operate from the same source of truth, errors drop, transparency rises, and the experience feels unified from start to finish.

Sweed In Action

Transparent Loyalty Tracking

Customers can see their points, purchase history, and available rewards in real time, no confusion, no guesswork.

Real-Time Updates + Branded Communications

Automated, mobile-friendly order alerts keep customers informed and engaged while reinforcing brand trust.

Seamless Integration Between eCommerce, POS, and Loyalty

Ensures every touchpoint, from menu to fulfillment, reflects live data for order accuracy and customer confidence thanks to Sweed's unified Customer Data Platform (CDP).

Maximize Customer Value



What Keeps Shoppers Engaged Between Visits?

The moments *between* purchases often determine whether a shopper becomes a loyal customer or drifts to a competitor. In a market where acquisition costs are high and competition is fierce, keeping customers engaged after the sale is the most effective way to drive sustainable growth.

The data underscores the opportunity:

69%

Of customers who sign up for a **loyalty program** say they're likely to return.

55%

Of **Gen Z** shoppers expect offers that reflect their preferences and behaviors.

29%

Only 29% of consumers say they **receive relevant promotions today**.

The gap between what customers expect and what dispensaries deliver is striking. Cannabis retailers are sitting on rich data – purchase history, browsing patterns, loyalty behavior – but too few are turning that information into meaningful, personalized outreach. The dispensaries that do are already winning repeat business at scale.

Turning data into delight: To truly maximize customer value, dispensaries need more than a loyalty program, they need *intelligent engagement*. Personalized offers, behavioral insights, and frictionless re-engagement transform one-time buyers into recurring revenue.

Sweed In Action

FRM Segmentation

Automatically groups customers based on frequency, monetary value, and recency of purchases to power smarter, more profitable marketing campaigns.

Dynamic QR Loyalty Sign-Up

Converts in-store and digital moments into loyalty sign-ups, ensuring no customer leaves without being connected.

Personalized Offers via Behavior-Based Campaigns

Uses real-time purchase and browsing data to deliver promotions that actually resonate with each individual shopper.

Drive Repeat Business



What Keeps Customers Coming Back and What Drives Them Away?

Winning a customer once is hard. Keeping them is harder. In cannabis retail, where brand loyalty is fragile and competition is intense, consistency, personalization, and communication are the levers that determine whether a shopper becomes a repeat customer or quietly moves on.

The survey results make it clear how delicate that balance is:

57%

Of consumers say **inconsistent experiences** make them stop visiting a dispensary.

45%

Say they'd **return more often** if offers and communications felt more personalized.

1 in 3

Shoppers have **churned from a dispensary they liked** because of irrelevant outreach or confusing promotions.

Every touchpoint – online, in-store, or via email or text – shapes the customer's perception of your brand. When those experiences don't align or feel impersonal, loyalty erodes fast. But when customers feel seen, remembered, and understood, repeat visits become second nature.

Consistency is the new loyalty: Driving repeat business isn't about doing more, it's about doing it *consistently*. Dispensaries that unify their customer data, personalize their outreach, and deliver steady, high-quality experiences across every channel are the ones that win over time.

Sweed In Action

Omnichannel Personalization

Create connected, consistent experiences across in-store, online, and mobile channels so customers always feel recognized.

Smart Nudges & AI

Recommendations

Use predictive insights to prompt repeat purchases, highlight new products, and delivery timely, relevant offers.

Unified Customer Data to Ensure Consistency

Sweed's built-in customer data platform connects POS, eCommerce, and marketing activity, ensuring every message, promotion, and experience is data-driven and on-brand.

How to Win the Modern Cannabis Shopper

The findings from this report paint a clear picture: the cannabis shopper has evolved. They're digitally fluent, time conscious, and loyalty-driven, *but only when their experience feels personal, consistent, and rewarding*. Across generations, the expectations are the same: the best dispensaries feel local, efficient, and tailored to the individual.

Dispensaries that adapt to this reality aren't just keeping up, they're pulling ahead. The path forward is clear, and it's built on four key imperatives:

1. Be Easy to Find

Shoppers start local and stay loyal to what's nearby and authentic. To grow reach, dispensaries must think like community hubs, powered by modern marketing. Local-first campaigns, referral programs, and geo-targeted tools help ensure your store shows up exactly where your shoppers are looking.

2. Make Shopping Simple, Relevant, and Fast

Ease of use is now the baseline for loyalty. The most successful retailers reduce friction – online and in-store – by combining intuitive eCommerce, clear product information, and real-time inventory accuracy. Every second saved earns customer trust.

3. Connect Loyalty and Personalization

Personalization is the foundation of retention. The opportunity is massive: connect loyalty and data to marketing and use it to deliver offers that actually matter. From AI-driven product suggestions to automated, behavior-based outreach, personalization transforms one-time buyers into repeat customers.

4. Learn from Behavior, Then Act on It

The most profitable dispensaries turn insight into action. Unified systems like Sweed's empower dispensaries to learn from every transaction, tailor communications, and ensure that every customer touchpoint feels connected, relevant, and on-brand.

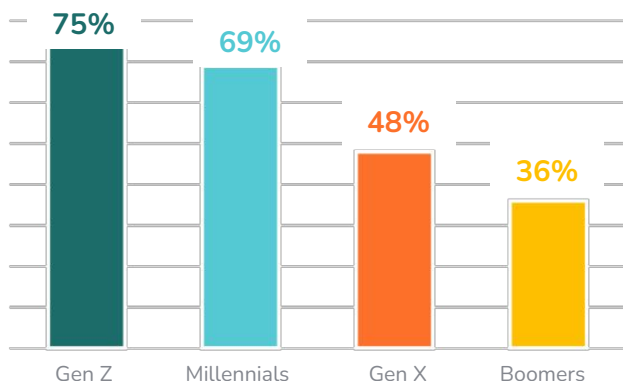
The Bottom Line: The modern cannabis shopper expects the sophistication of mainstream retail, with the authenticity and expertise dispensaries can provide. Sweed gives operators the edge they need to grow, empowering operators with the tools, intelligence, and partnership to turn data into loyalty, loyalty into growth, and every customer interaction into an opportunity to win

Appendix

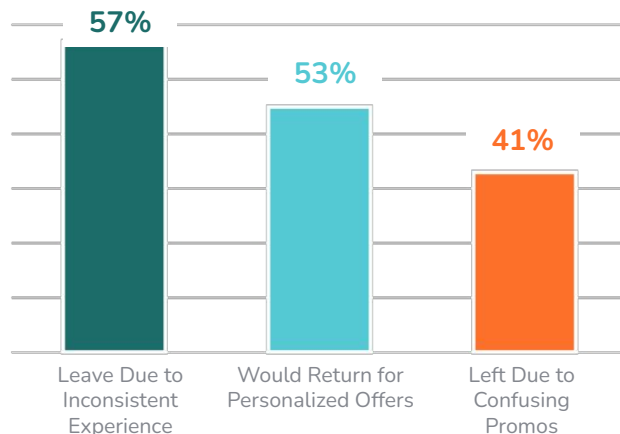


Full Data Highlights

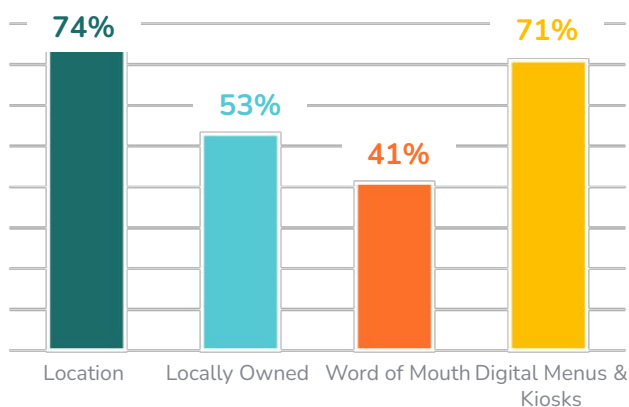
Cannabis Use By Generation



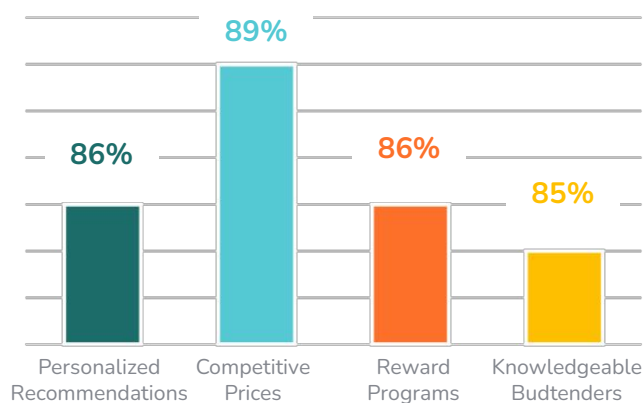
Why Shoppers Churn or Return



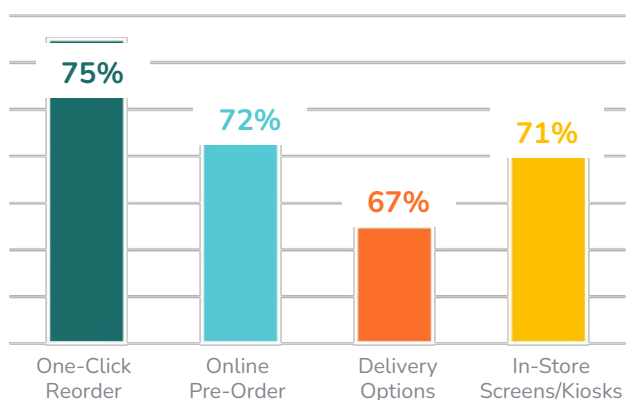
What Drives Choice



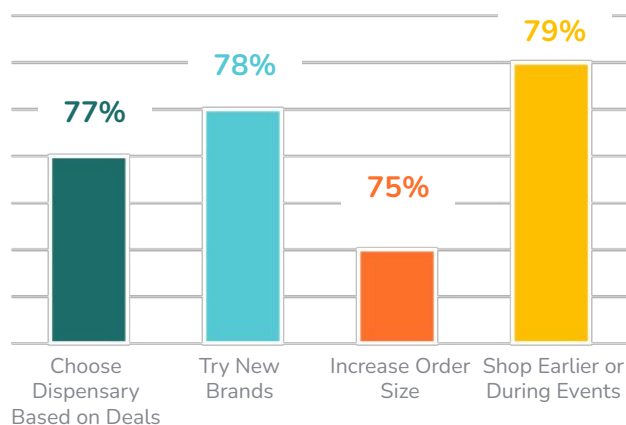
Top Loyalty Drivers



Most-Valued Digital Features



Impact of Promotions





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