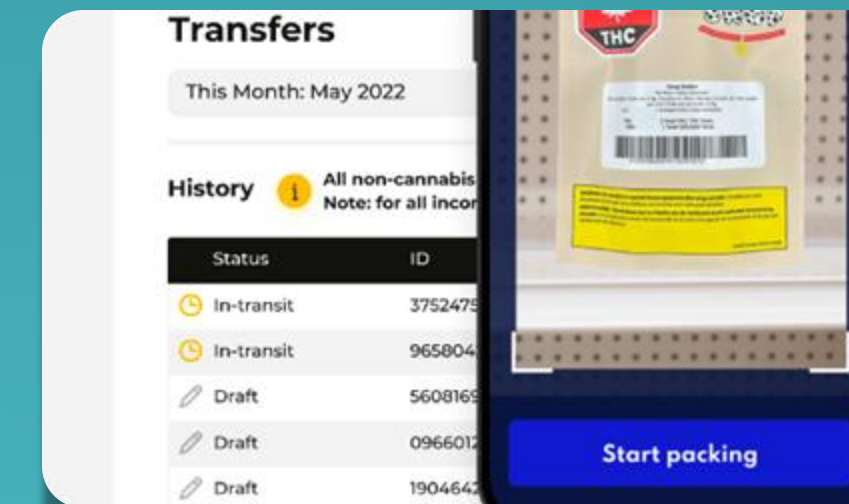
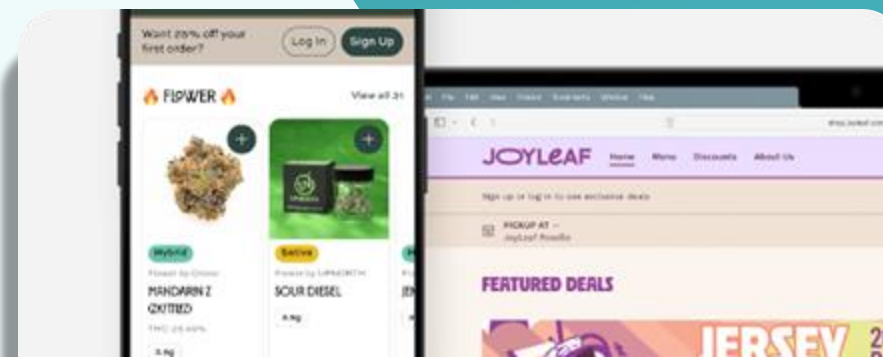
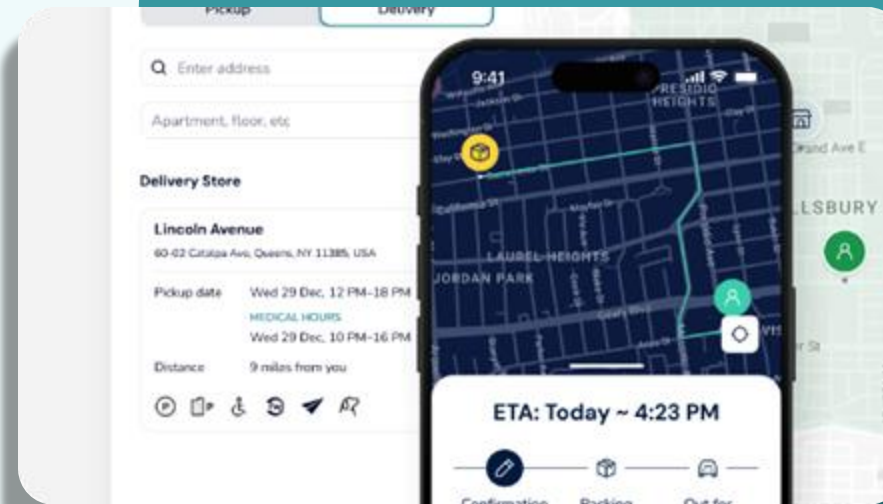
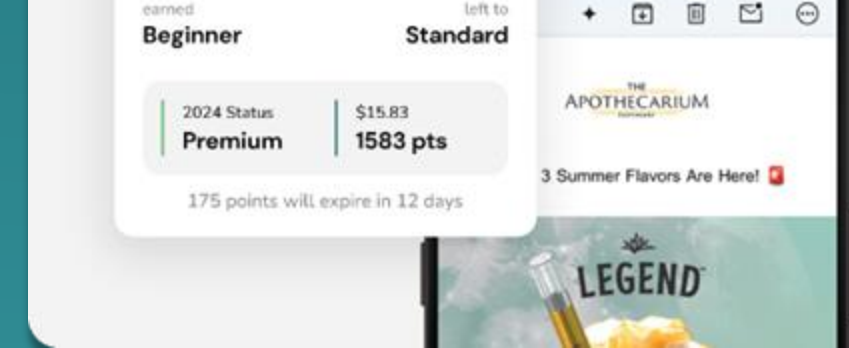
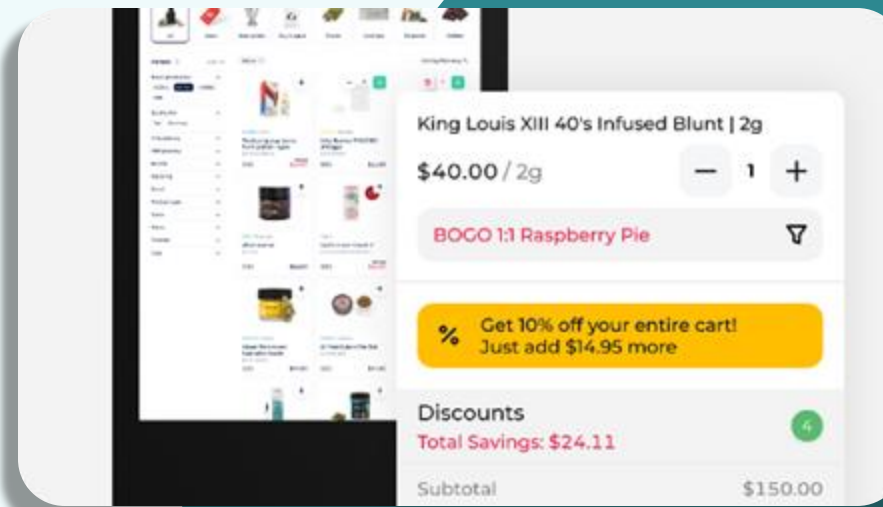


# swweed

# Inside the Modern Dispensary

2025 Takeaways + 2026 Predictions



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+ Key Takeaways

# Inside the Modern Dispensary

## Cannabis retail has entered a new phase.

What was once a novelty-driven category has evolved into a **mainstream retail experience** shaped by speed, convenience, and digital-first expectations. Today's consumers are no longer making special trips or lingering in-store, *they're integrating cannabis purchases into their everyday routines, much like grocery or pharmacy shopping.*

The findings are clear:

- **Online impacts ordering more than ever.**
- **Cash remains dominant but digital payments are accelerating.**
- **Product preferences are diversifying.**
- **Shopping patterns increasingly mirror traditional retail rhythms.**
- **Millennials and young Gen X consumers lead spend.**

Looking ahead to 2026, these trends point toward an industry rapidly embracing **delivery, AI-powered personalization, smarter promotions, and experience consistency** as competitive differentiators. The retailers who win won't rely on novelty, they'll operate with the same efficiency, intelligence, and customer-first design as modern retail leaders.

This guide breaks down the **key takeaways from 2025** and the **predictions shaping 2026**, offering a practical roadmap for navigating the next era of cannabis retail.

"The biggest digital transformation happening in cannabis retail is about **intelligence**. Consumers have always wanted fast, frictionless recommendations that actually make sense for them. AI makes that possible at scale. For the first time, dispensaries can provide the same personalized 1:1 experience from every touchpoint - that's becoming the new standard.

The retailers who embrace AI-driven operations in 2026 and beyond will see exponential gains in loyalty, efficiency, and revenue."

– **Rocco Del Priore**  
Sweed Co-Founder

## METHODOLOGY

# How We Crunched The Numbers

This report is built on a combination of **real-world purchasing behavior** and **direct consumer feedback**, allowing us to examine not only what shoppers say they want, but how they actually behave at the point of sale. The goal of this approach is to move beyond opinion or anecdote and ground these insights in data that reflects the realities of day-to-day cannabis retail operations.

The analysis draws from two primary sources: **aggregated, anonymized transaction data from the Sweed platform across all of 2025**, covering both in-store and online purchases, and a **nationally representative survey of 955 U.S. adults aged 21+**, conducted by third-party research firm Wired Research. By pairing platform data with consumer sentiment, these insights capture both **intent and behavior**, providing a clearer, more complete picture of how cannabis retail is evolving in real time.

### 2025 Sweed Platform Data

Aggregated, anonymized transaction data pulled from the Sweed platform from January 1, 2025 – December 1, 2025.

### 2025 Cannabis Consumer Survey

Conducted by [Wired Research](#) surveying 955 nationally representative Americans aged 21+ between October 6-10, 2025, with a margin of error  $\pm 3.2\%$ . Results were weighted to reflect the U.S. adult population.



# 2025

## Takeaways

7



# Online ordering shapes how customers choose where to shop and what to buy

In 2025, web orders accounted for **27%+ total sales** through the Sweed platform, making online ordering one of the most influential touchpoints in the cannabis shopping journey. Rather than just functioning solely as a fulfillment channel, online ordering acts as the **primary discovery** and **decision layer**, where customers browse menus, compare products, reserve items, and plan faster pickup experiences before ever entering the store.

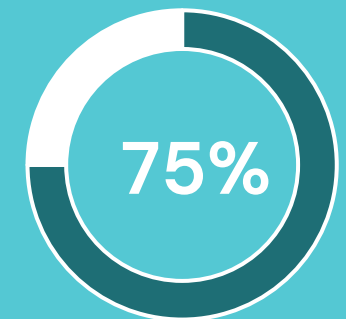
Consumer expectations strongly reinforce this behavior shift: **72% of shoppers want the ability to pre-order online**, **75% want one-click reordering**, and **71% say digital tools such as online menus, kiosks, and in-store screens are essential to their experience**. At the same time, **68% say a simple, intuitive online menu influences where they shop**.

For today's cannabis consumers, this means the online menu is effectively the storefront, with digital experiences increasingly determining **which dispensary a shopper chooses, what products they consider, and how prepared they are when they arrive**. Retailers that invest in intuitive menus, accurate inventory, and personalized digital discovery will capture more foot traffic, higher conversion, and greater basket sizes, both online and in-store.

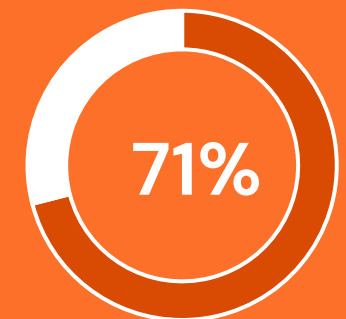
Of shoppers want the ability to **pre-order online**.



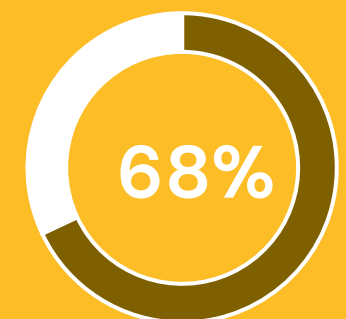
Want **one-click reordering**, mirroring mainstream eCommerce.



Say digital tools such as online menus and kiosks, are essential to their experience.



Say simple, intuitive **online menus** influence **where they shop**.





## TAKEAWAY #2

# Cash remains king, even as electronic payments grow

In 2025, cash was the number one payment method on the Sweed platform, closely followed by ACH + Mixed Payments, indicating a meaningful shift toward mainstream payment behaviors. This is mirrored in shopper expectations, with an increased demand for digital conveniences in cannabis retail, including **fast pickup, one-click reordering, and mobile-first ordering.**

This suggests consumers are primed for **more frictionless, digital-first transactions,** even given the current regulatory landscape. Additionally, survey responses show that **speed and convenience are high-value differentiators,** with **43%** of consumers prioritizing overall shopping speed.

This shift is expected to continue in 2026, with shoppers continuing to favor electronic payments, which is expected to **unlock better upselling workflows, reduce checkout time, and support eCommerce-driven behavior.** Additionally, as regulatory constraints are expected to loosen, 2026 will likely be the first year when **digital payments overtake cash in high-volume markets.**

### Sweed Platform Payment Method Breakdown

Cash

55.5%

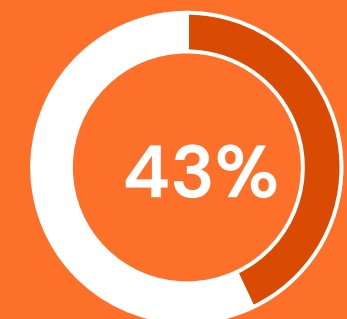


ACH + Mixed Payments

44%



Consumers say they prioritize overall shopping speed when choosing where they shop.





## TAKEAWAY #3

# Flower still leads the market, but consumer preferences are diversifying

While flower continued as the top product category across the Sweed platform in 2025, vapes, edibles, pre-rolls, cartridges, and gummies show substantial share, especially among younger and mid-age consumers.

For retailers, this means that educational tools, guided experiences, and AI-powered recommendations are becoming **critical revenue layers**, helping retailers guide consumers toward the right products and reduce overwhelming customers with too many product choices. Product variety and brand diversity is also expected to continue to expand, further emphasizing the importance of smart technology that provides quick, reliable insights for frontline staff, and customers browsing online menus.

### Top Product Categories Through the Sweed Platform in 2025



Flower

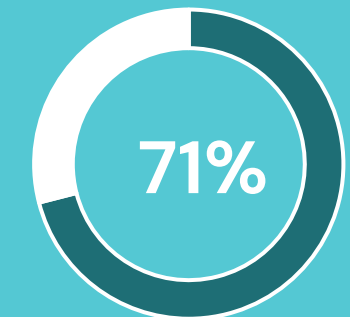


Vape Products

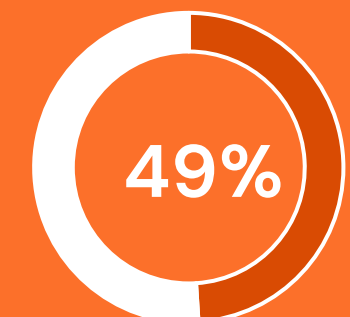


Edibles

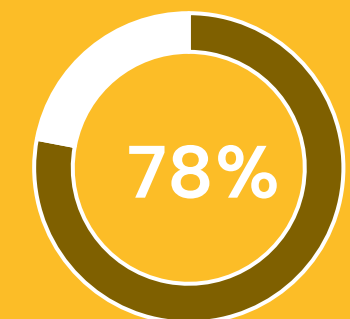
Of shoppers say product education influences their purchases.



Report feeling overwhelmed by too many product choices.



Say promotions encourage them to try new brands or products.







## TAKEAWAY #4

# Customers shop between midday and early evening, mirroring traditional retail rhythms

These trends demonstrate that cannabis shopping is **no longer a novelty errand** where consumers carve out time to browse, explore new products, or revel in the uniqueness of regulated cannabis. Instead, shopper behavior now mirrors how people purchase any other **everyday household item**, quickly, conveniently, and on a predictable schedule.

This shift signals that cannabis has fully entered the **mainstream retail rhythm**, and retailers are no longer able to win on novelty alone, but must meet customers with the same convenience, clarity, and time-saving workflows they expect from grocery, pharmacy, or QSR.

This is also seen in the demographics that make up cannabis shoppers, including parents who are often time-strapped, and are **43% more likely to use cannabis than non-parents**, underscoring the need for **mobile-first options, personalization-driven workflows, convenience-oriented experiences**, and **greater emphasis on digital menus and AI recommendations**.

### Peak Shopping Hours Across the Sweed Platform in 2025



Midday: 11am – 2pm

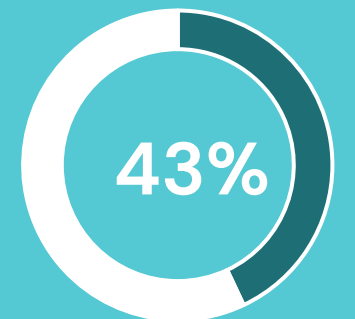


Late Afternoon: 3pm – 5pm

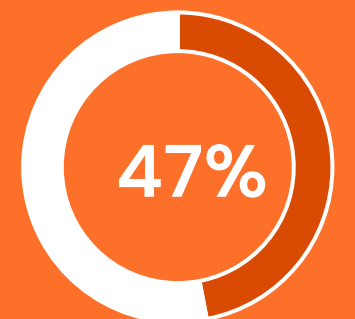


Early Evening: 5pm – 7pm

Prioritize a speedy shopping experience.



Cite order accuracy as the top factor for retention.





# 2026

## Predictions

## PREDICTION #1

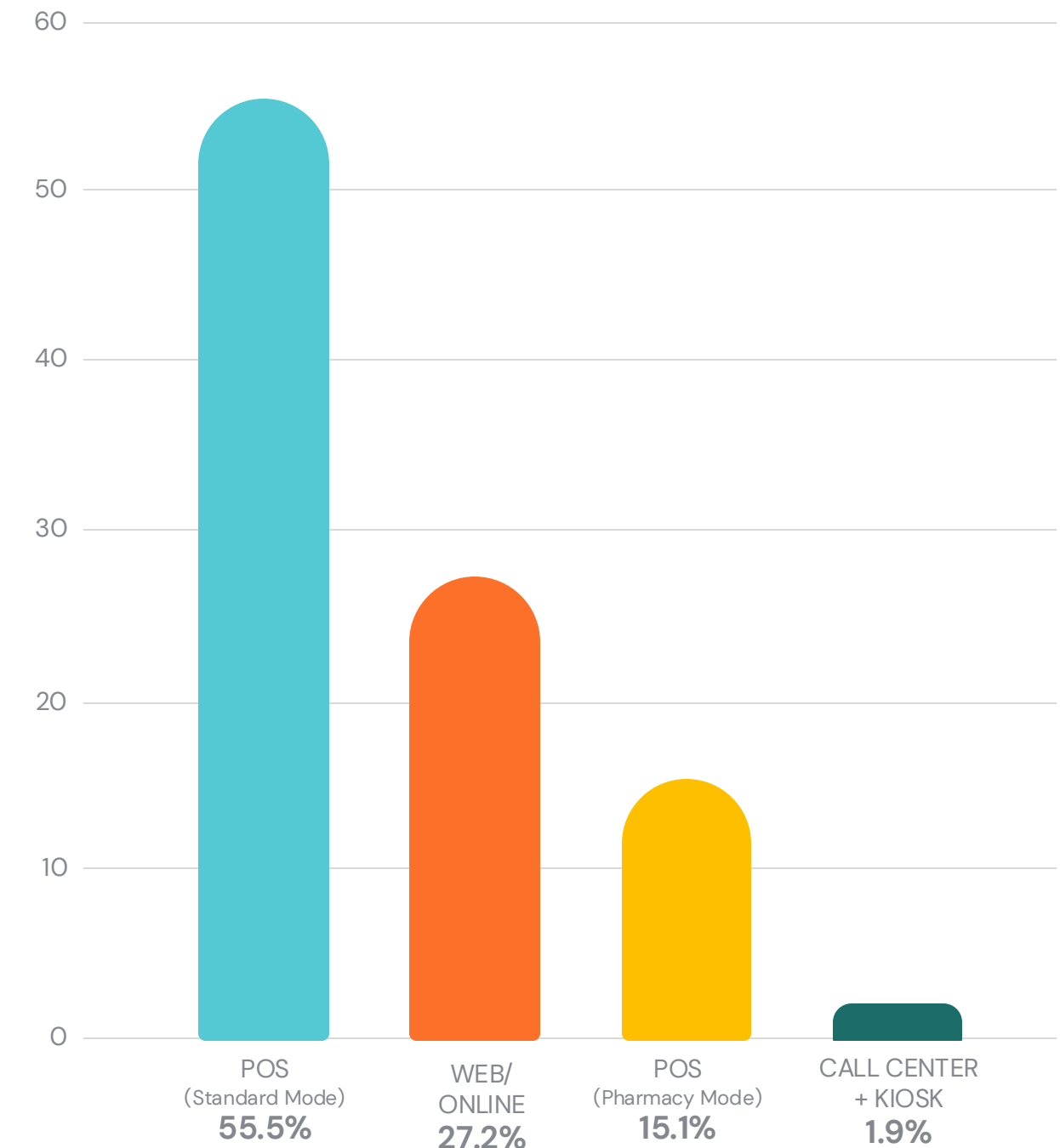
# Online ordering will surpass one-third of all cannabis revenue

In 2025, ~30% of all cannabis transactions across the Sweed platform involved digital behaviors, including web/online ordering, pickup orders, and delivery. This is combined with survey results that showed that **72% of cannabis shoppers want to pre-order online**, while **75% want one-click reordering**, which mirrors other retail industries.

We expect this trend to continue, with **online ordering surpassing 33-35% of total revenue in 2026**, driven by better online menus, faster fulfillment workflows, increasing comfort from older demographics, and more states normalizing delivery. Additionally, the ease and convenience that online ordering provides to busy consumers is a driving factor that will impact the landscape of purchasing, and is one that retailers should seek to optimize, in order to meet, and exceed, customer expectations.

### Top Order Types Across the Sweed Platform in 2025

By largest total sales volume



## PREDICTION #2

# Delivery will become the fastest-growing fulfillment channel

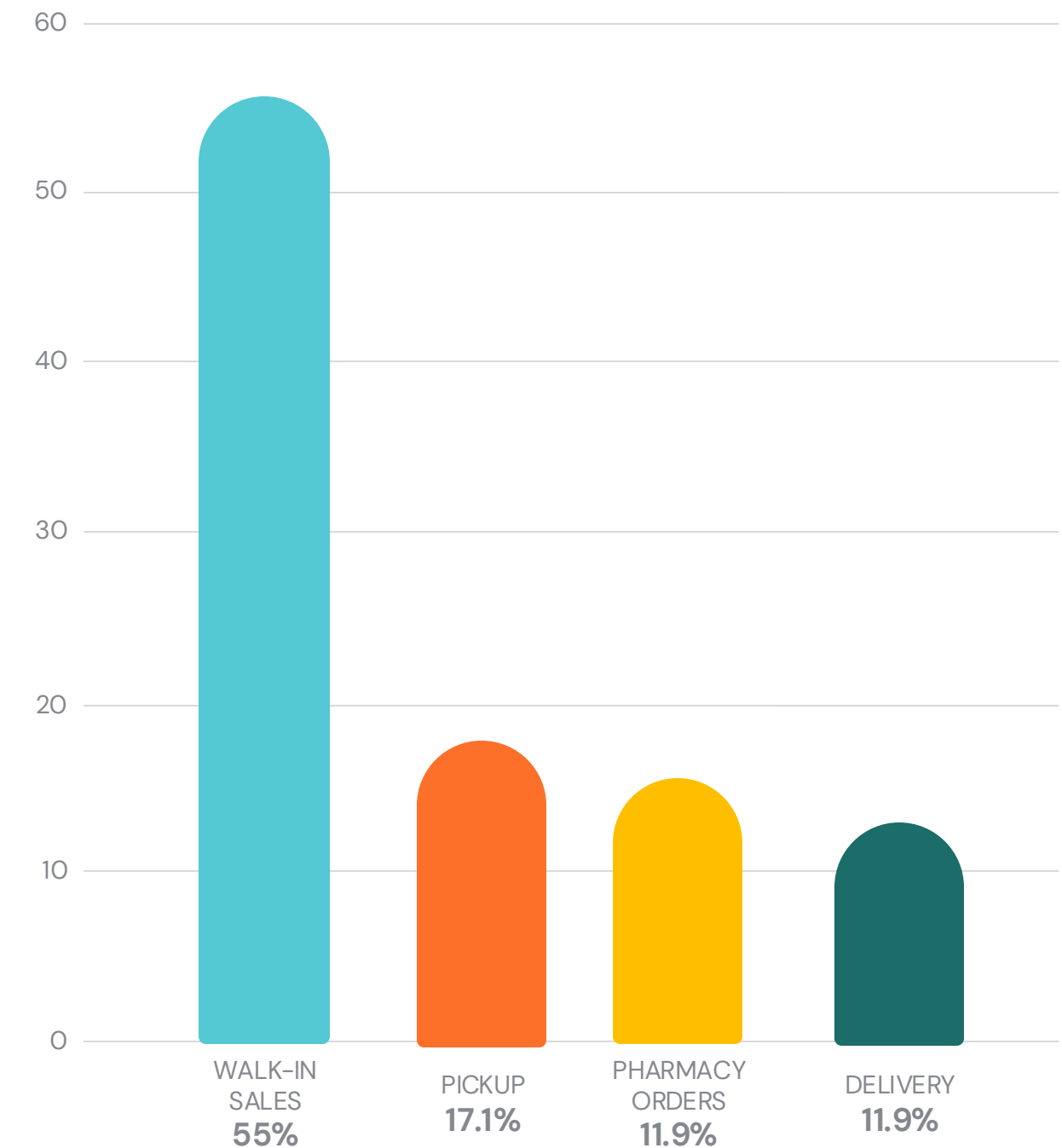
While walk-in orders continued to dominate the market in 2025, **delivery accounted for 11.9% of sales across the Sweed platform**, out-performing kiosk orders and curbside which made up less than 1% combined.

The dynamics of delivery are very interesting in cannabis, as there is a clear divide between customer preferences (**67% of survey respondents reported that delivery is essential to their shopping experience**), and what is feasible under current cannabis regulations and restrictions, as many states outright prohibit cannabis delivery.

However, with predicted changes to cannabis regulations in 2026, and shifting customer preferences, we believe that **delivery will grow 25-40%, year-over-year**, becoming the preferred fulfillment method in the new year, specifically for busy parents (of whom 67% use cannabis), GenZ/millennials (who over-index in digital-first behavior), and suburban and rural markets with fewer retail storefronts. As a result, retailers who build delivery logistics and automated repeat ordering are expected to capture disproportionate market share.

### Top Fulfillment Types Across the Sweed Platform in 2025

By total dollar volume





## PREDICTION #3

# Cash will fall below 50% of total cannabis payments for the first time

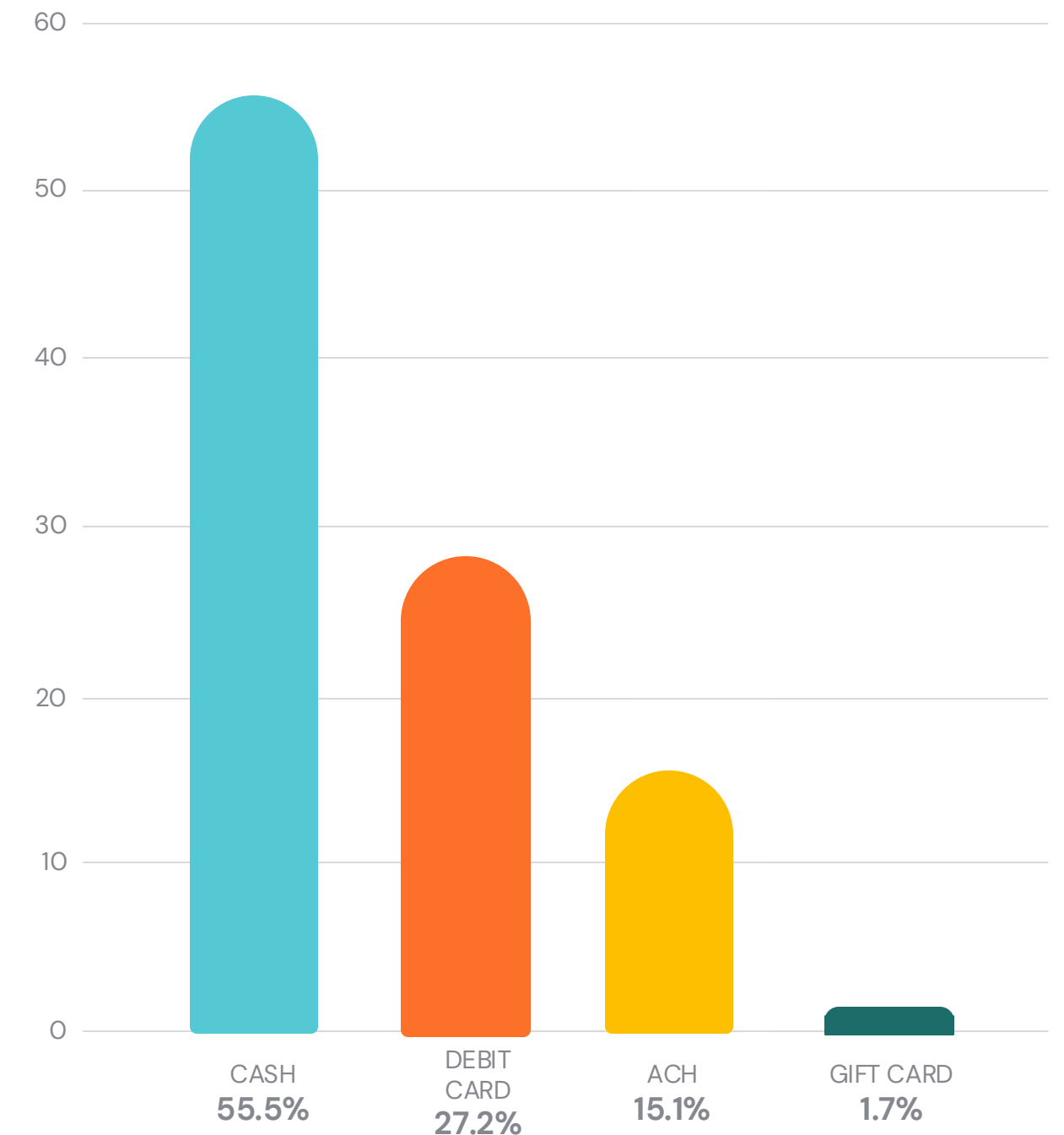
In 2025, **cash made up 55.5%** of total gross receipts on the Sweed platform, while **digital/electronic payments, combined, accounted for 44%**, signifying an important, and notable, shift in the cannabis industry, one that has historically been restricted to cash transactions.

As more states expand debit, ACH, and compliant card-not-present solutions are expected to rise. This benefits the retailers as electronic payments allow for better upselling opportunities, which lead to higher basket sizes, and reduce the risks of running a cash-only business, while consumers benefit from flexibility, ease-of-use, and speed of checkout, all facts that consumers have reported to be top priorities for them when considering where to purchase.

We predict that by late 2026, **cash will drop to ~48-49% of total payments**, making cannabis a **majority-digital payment industry for the first time**. Overall, this is expected to reduce checkout time, improve upselling opportunities and increase basket size, improve transaction accuracy, increase eCommerce conversion, and enable more AI-driven loyalty and retention workflows tied to identity-based payment methods.

### Top Payment Methods Across the Sweed Platform in 2025

Highest total gross receipts



## PREDICTION #4

# AI will influence 40–60% of cannabis transactions by year-end

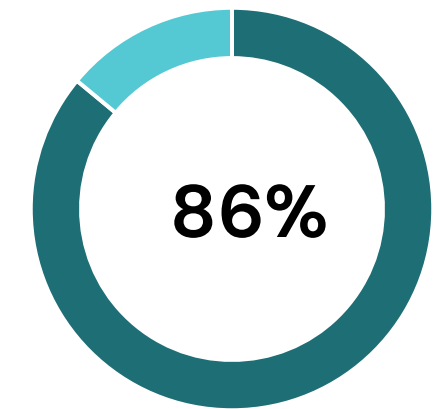
2025 was a big year for AI, especially in traditional retail, and customers have quickly adapted to the ease and personalization that AI offers them.

Expectations around shopping in cannabis are no different, with **86% of consumers reporting that they prioritize dispensaries that offer them personalized recommendations**, which **45% of consumers report that they would visit a dispensary more often if they received a personalized offer**.

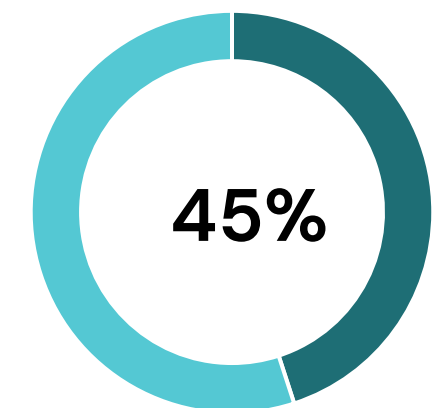
We expect these preferences to continue to expand and evolve, and predict that by December 2026, **AI-assisted curation will contribute to nearly half of all carts**, online and in-store. Meaning operators who adopt AI-native workflows (menus, promotions, content intelligence) will outperform those who rely on manual processes.

We also see these trends impacting upcoming product features, and are already implementing AI into Sweed tools to empower dispensary staff with intelligent product recommendations, upsells at the register, personalized eCommerce carousels, dynamic customer segmentation, and automated product grids in marketing.

Consumers report that they prioritize shopping at dispensaries that offer personalized recommendations.



Consumers report they would visit a dispensary more often if they received a personalized offer.



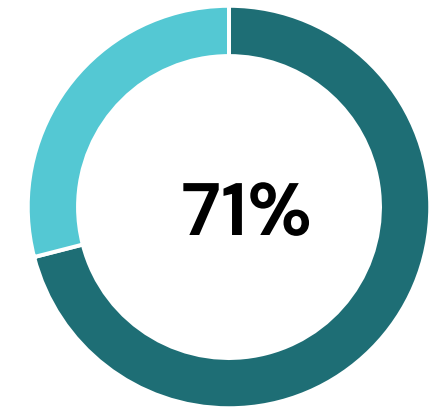
## PREDICTION #5

# Product mix will shift toward precision experiences, not just format preferences

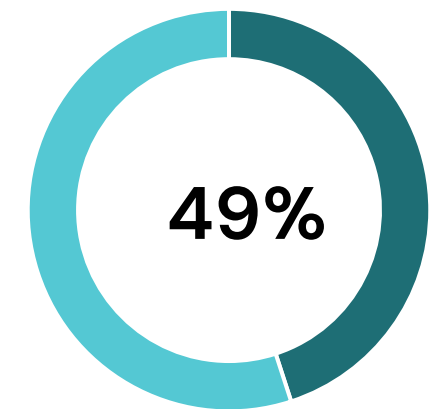
The cannabis industry is at an interesting cross-roads in that consumer education and knowledge is growing, while new brands are entering the market, bringing along with them new product sub-categories, and product varieties. These shifts are seen in the **71% of consumers who say that product education directly impacts what they buy**, and the **49% of consumers who report feeling overwhelmed by too product and brand choices**.

As a result, we predict that in 2026 the most significant growth won't come from new product formats, but rather from **AI-personalized precision recommendations** that guide shoppers to minor cannabinoids, formulations for mood, sleep, and focus, microdosed products, and occasion-based bundles. This will be seen with a retail shift from “category-first merchandising” to **intention-first merchandising**.

Consumers say product education directly impacts what they buy.



Consumers feel overwhelmed by too many product and brand choices.



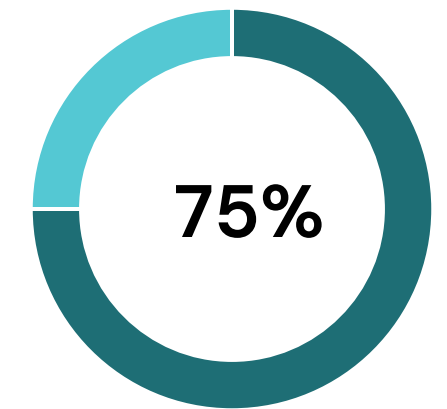
## PREDICTION #6

# Promotions will become more scientific thanks to AI predictions around demand and timing

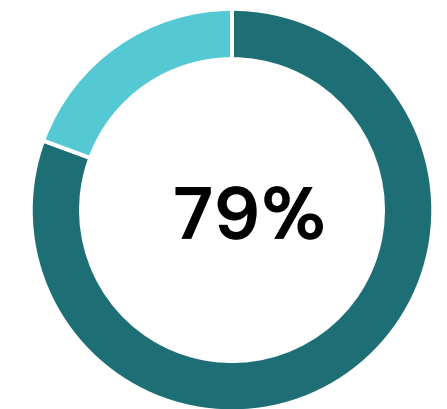
Another place that we expect AI to influence cannabis retail is when it comes to marketing and loyalty, specifically when it comes to promotions and outreach. These shifts are due in large part to consumer preferences, with **75% of consumers reporting that they increase their order size during promotions, 79% reporting that they shift when they shop based on discounts, and 45% reporting that they'd return more to a dispensary if they were given personalized offers.**

We expect that as a result, 2026 will be the first year when cannabis widely adopts AI-powered promotional timing, dynamic discounting, personalized discounts based on buyer likelihood, and win-back offers triggered automatically by churn signals. Specifically, major cannabis holidays such as Green Wednesday, 420, and 710, will become engineered in a similar fashion to mainstream retail's Black Friday, with the winners being the ones who are able to offer **smarter, customized, and more personalized** promotions to shoppers.

Consumers say they increase their order size during promotions.



Consumers say they'd return more often to a dispensary that offers them personalized offers.





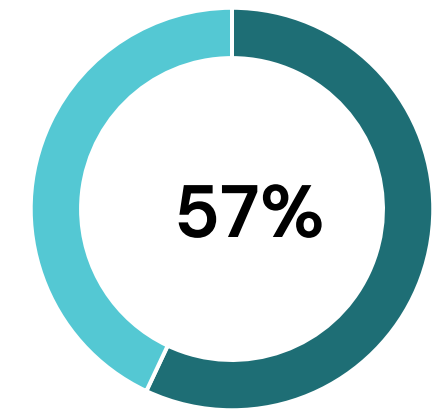
## PREDICTION #7

# “Experience consistency” will become a top KPI as churn rises

While dispensary operators and employees understand the work that has historically been required to juggle different platforms and systems in order to provide a consistent experience for customers, customers are no longer giving retailers the benefit of the doubt as they expect better, more seamless, and personalized cannabis shopping experiences, more in-line with mainstream retail. In fact, **59% of shoppers report that they leave dispensaries because of inconsistent experiences**, and **1 in 3 customers report that they churn after receiving irrelevant promos or confusing outreach**.

We expected these heightened customer expectations will increase in 2026, requiring retailers to consider **consistency** as a key metric, including menu accuracy, inventory synchronization, loyalty point clarity, speed of checkout, and personalized recommendations. It's clear that operators with unified systems (POS + loyalty + eCommerce), will outperform fragmented stacks by lowering churn and boosting lifetime value, while delivering intelligent, customized, and seamless experiences for their customers.

Of shoppers leave  
dispensaries because of  
inconsistent  
experiences.



**1 in 3** customers churn after receiving  
irrelevant promos or confusing outreach.



# The Modern Cannabis Playbook

## What the Data Makes Clear

Cannabis retail has officially crossed the threshold into modern retail. The behavior uncovered in this guide shows a category no longer driven by novelty or experimentation, but by **efficiency, familiarity, and digital-first expectations**. Consumers now approach cannabis purchases the same way they approach traditional retail: **they browse ahead of time, prioritize speed and convenience, expect personalization, and transact on predictable schedules**.

The data also makes one thing unmistakable: **digital influence now extends far beyond online checkout**. Online menus shape discovery, AI-driven recommendations guide product selection, and loyalty driven personalization determines where shoppers return. Even when transactions are completed in-store, they are increasingly informed by digital behaviors that begin well before a customer walks through the door. As payments, fulfillment methods, and product assortments continue to evolve, **retailers must think holistically about how data, technology, and operations work together to remove friction and create relevance at scale**.

Looking ahead to 2026, the competitive gap will widen between operators who modernize and those who don't. **AI-powered personalization, digital payments, and experience consistency are no longer optional enhancements, they are foundational capabilities**. Retailers that invest in unified systems and intelligence-driven workflows will unlock measurable gains in loyalty, efficiency, and revenue, while those relying on fragmented tools and manual processes risk falling behind an increasingly retail-savvy consumer base.

### Key Takeaways for Cannabis Retailers

- **Online ordering is now a primary decision layer**, influencing where customers shop and what they buy, even when fulfillment happens in-store.
- **Digital convenience and speed drive loyalty**, with shoppers prioritizing pre-ordering, one-click reordering, and fast checkout.
- **Cash still dominates, but electronic payments are accelerating**, setting the stage for a majority-digital payment mix in 2026.
- **Product demand is diversifying**, increasing the importance of education, guided selling, and AI-powered recommendations.
- **Shopping behavior mirrors traditional retail rhythms**, reinforcing the need for predictable staffing, promotions, and fulfillment.
- **AI is becoming a competitive requirement**, influencing recommendations, promotions, loyalty, and operational efficiency.
- **Experience consistency is emerging as a top KPI**, directly tied to churn, repeat visits, and lifetime value.



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