

THIS
CANNABIS
BRAND

MARKETING
PERFORMANCE
SCORECARD

PLUS

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Score vs. Week 43		Social Media	Earned Media	Web Activities	Overall Index
500 + 13		219 + 29	728 + 18	535 + 18	
All Brands Index	Week 47 - 576 Brands	MIDDLING #206 64%	PRODUCING #165 71%	ELITE #8 99%	PRODUCING #83 86%
	Week 43 - 566 Brands	#216 62%	#186 67%	#18 97%	#100 82%
AZ Index	Week 47 - 45 Brands	#19 58%	#20 54%	#2 96%	#12 73%
	Week 43 - 44 Brands	#21 51%	#25 43%	#5 89%	#14 68%
Edibles Index	Week 47 - 162 Brands	#59 64%	#47 71%	#4 98%	#26 84%
	Week 43 - 161 Brands	#54 66%	#57 65%	#8 95%	#27 83%
Edibles AZ	Week 47 - 20 Brands	#9 55%	#9 55%	#2 90%	#7 65%
	Week 43 - 19 Brands	#11 42%	#12 37%	#3 84%	#7 63%



Score 500

vs. Week 43 +13

Week 47

Week 43

Non Retail Index

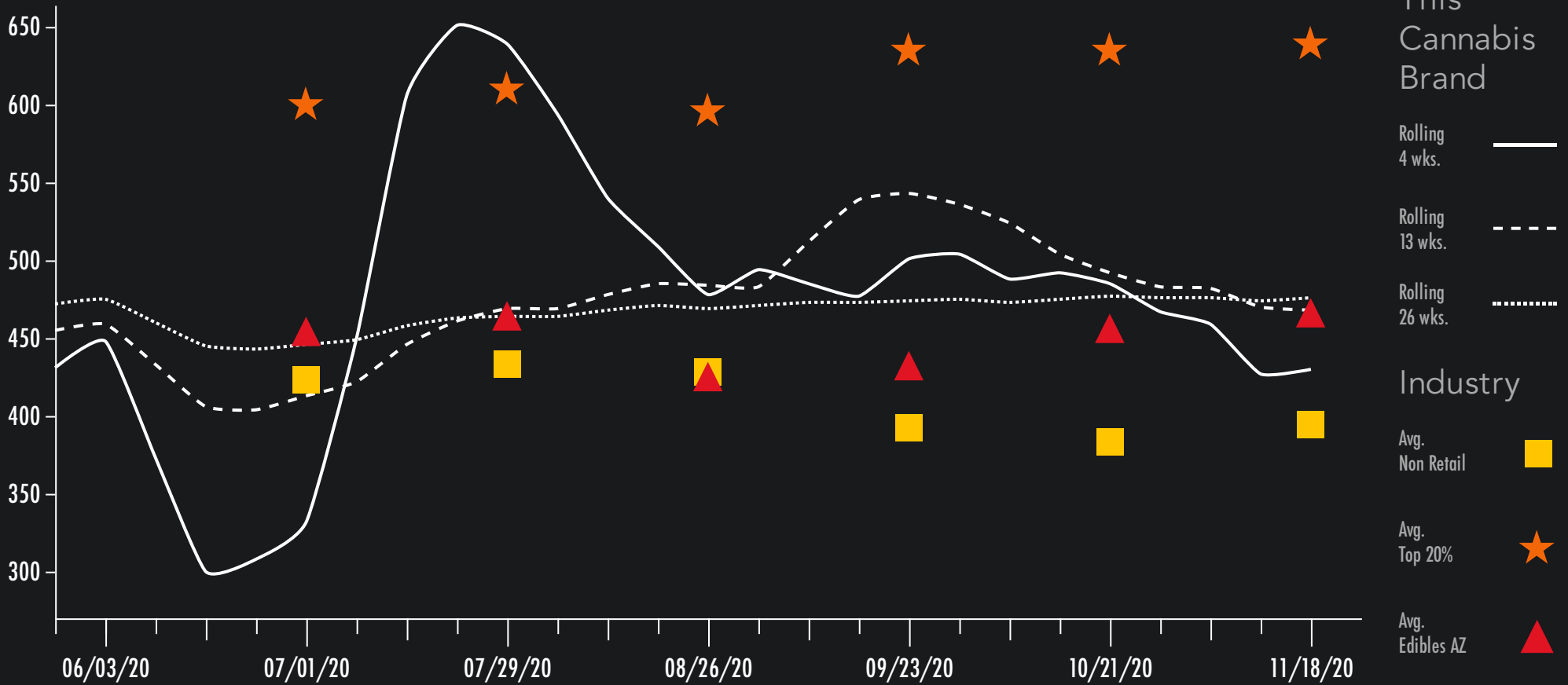
#176 of 521 66%

#189 of 526 64%

Non Retail AZ

#17 of 38 55%

#19 of 39 50%



Score		Audience Size	Audience Health	Engagement Rate
4 week rolling avg. / 13 week rolling avg.		561 464 / 548	525 469 / 559	494 461 / 475
All Brands Index	Week 47 - 576 Brands	MIDDLING #213 63%	MIDDLING #203 65%	MIDDLING #271 53%
	Week 43 - 566 Brands	#330 42%	#231 59%	#112 80%
AZ Index	Week 47 - 45 Brands	#19 58%	#20 56%	#20 56%
	Week 43 - 44 Brands	#28 36%	#23 48%	#13 70%
Edibles Index	Week 47 - 162 Brands	#55 66%	#53 67%	#87 46%
	Week 43 - 161 Brands	#97 40%	#60 63%	#37 77%
Edibles AZ	Week 47 - 20 Brands	#8 60%	#9 55%	#11 45%
	Week 43 - 19 Brands	#12 37%	#11 42%	#8 58%
Non Retail Index	Week 47 - 521 Brands	#179 66%	#166 68%	#239 54%
	Week 43 - 526 Brands	#298 43%	#202 62%	#105 80%

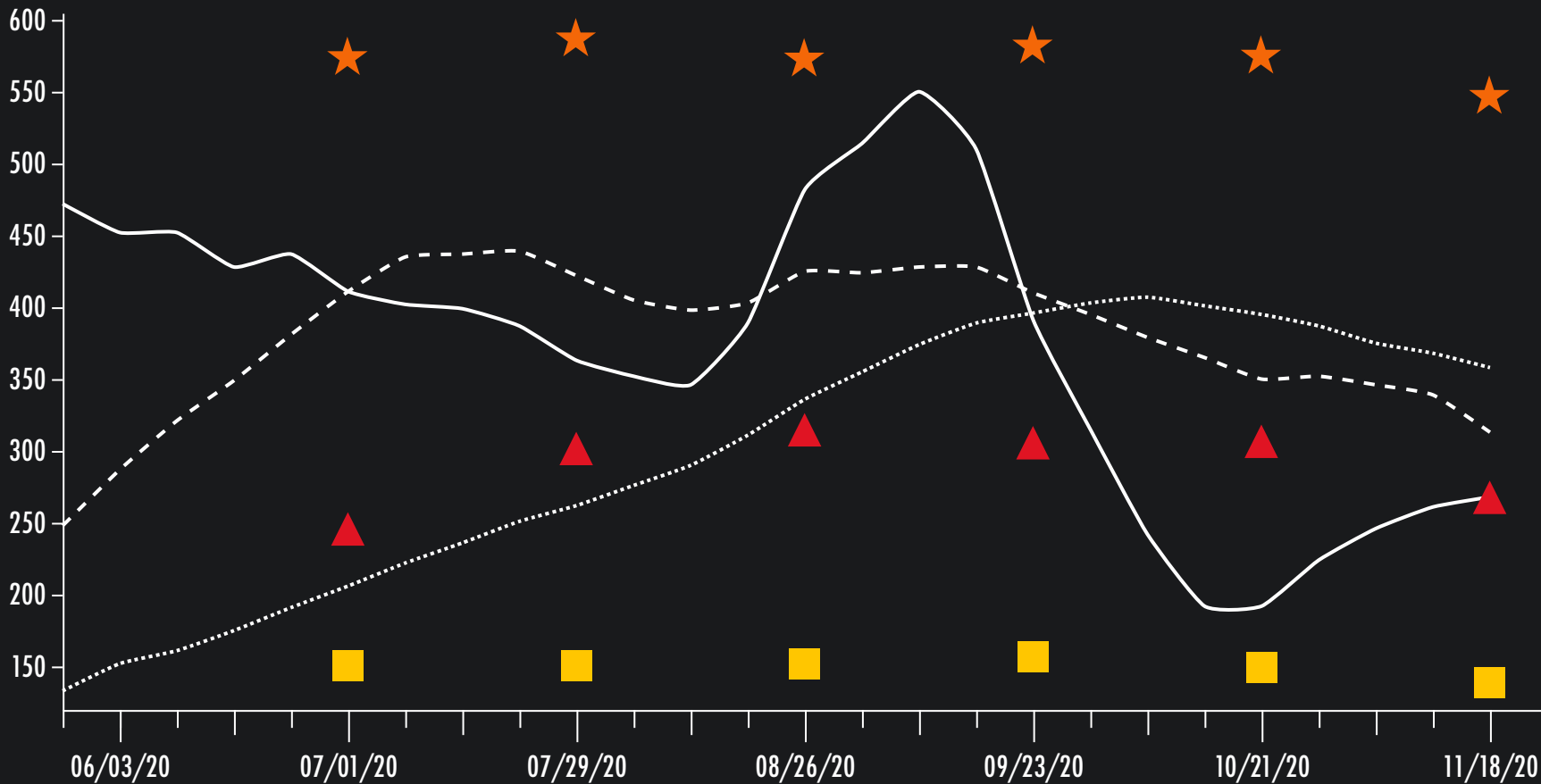


Score 219
vs. Week 43 + 29

Week 47
Week 43

Non Retail Index
#133 of 521 74%
#155 of 526 71%

Non Retail AZ
#15 of 38 59%
#20 of 39 49%



This Cannabis Brand

Rolling 4 wks.
Rolling 13 wks.
Rolling 26 wks.

Industry

Avg. Non Retail
Avg. Top 20%
Avg. Edibles AZ



Score		Impact	Social Echo
4 week rolling avg. / 13 week rolling avg.		195 245 / 216	163 192 / 229
All Brands Index	Week 47 - 576 Brands	PRODUCING #140 76%	PRODUCING #173 70%
	Week 43 - 566 Brands	#380 33%	#241 57%
AZ Index	Week 47 - 45 Brands	#18 60%	#20 56%
	Week 43 - 44 Brands	#33 24%	#27 39%
Edibles Index	Week 47 - 162 Brands	#43 73%	#50 69%
	Week 43 - 161 Brands	#111 31%	#76 53%
Edibles AZ	Week 47 - 20 Brands	#8 60%	#8 60%
	Week 43 - 19 Brands	#15 21%	#12 37%
Non Retail Index	Week 47 - 521 Brands	#113 78%	#139 73%
	Week 43 - 526 Brands	#346 34%	#209 60%

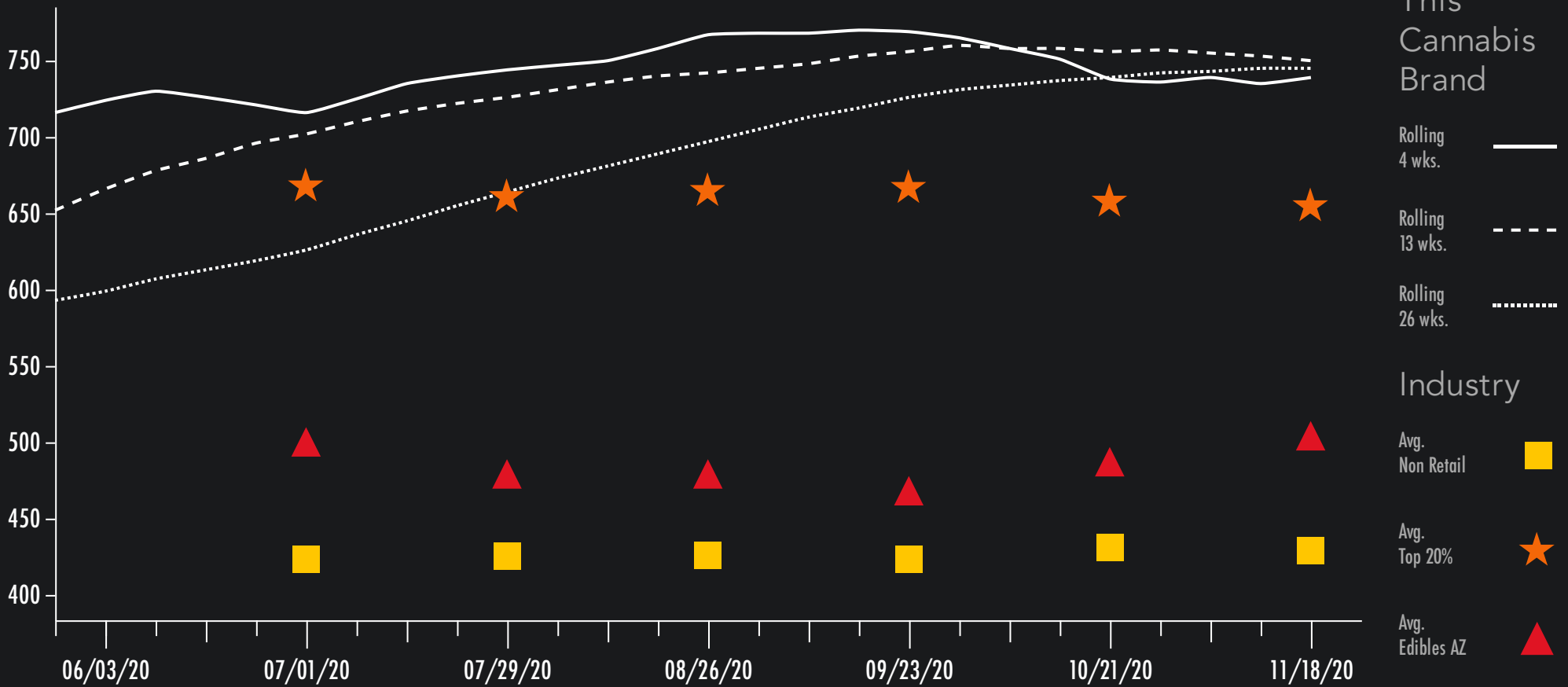


Score 728
vs. Week 43 + 18

Week 47
Week 43

Non Retail Index
#3 of 521 99%
#9 of 526 98%

Non Retail AZ
#1 of 38 97%
#3 of 39 92%



		Keywords	Backlinks	Traffic
Score		894	609	680
4 week rolling avg. / 13 week rolling avg.		904 / 919	596 / 624	740 / 764
All Brands Index	Week 47 - 576 Brands	ELITE #4 99%	LEADING #54 91%	LEADING #51 91%
	Week 43 - 566 Brands	#3 99%	#62 89%	#26 95%
AZ Index	Week 47 - 45 Brands	#3 93%	#6 87%	#7 84%
	Week 43 - 44 Brands	#1 98%	#8 81%	#7 84%
Edibles Index	Week 47 - 162 Brands	#2 99%	#20 88%	#18 89%
	Week 43 - 161 Brands	#1 99%	#21 87%	#11 93%
Edibles AZ	Week 47 - 20 Brands	#2 90%	#5 75%	#5 75%
	Week 43 - 19 Brands	#1 95%	#5 74%	#3 84%
Non Retail Index	Week 47 - 521 Brands	#3 99%	#39 92%	#28 95%
	Week 43 - 526 Brands	#2 100%	#53 90%	#14 97%

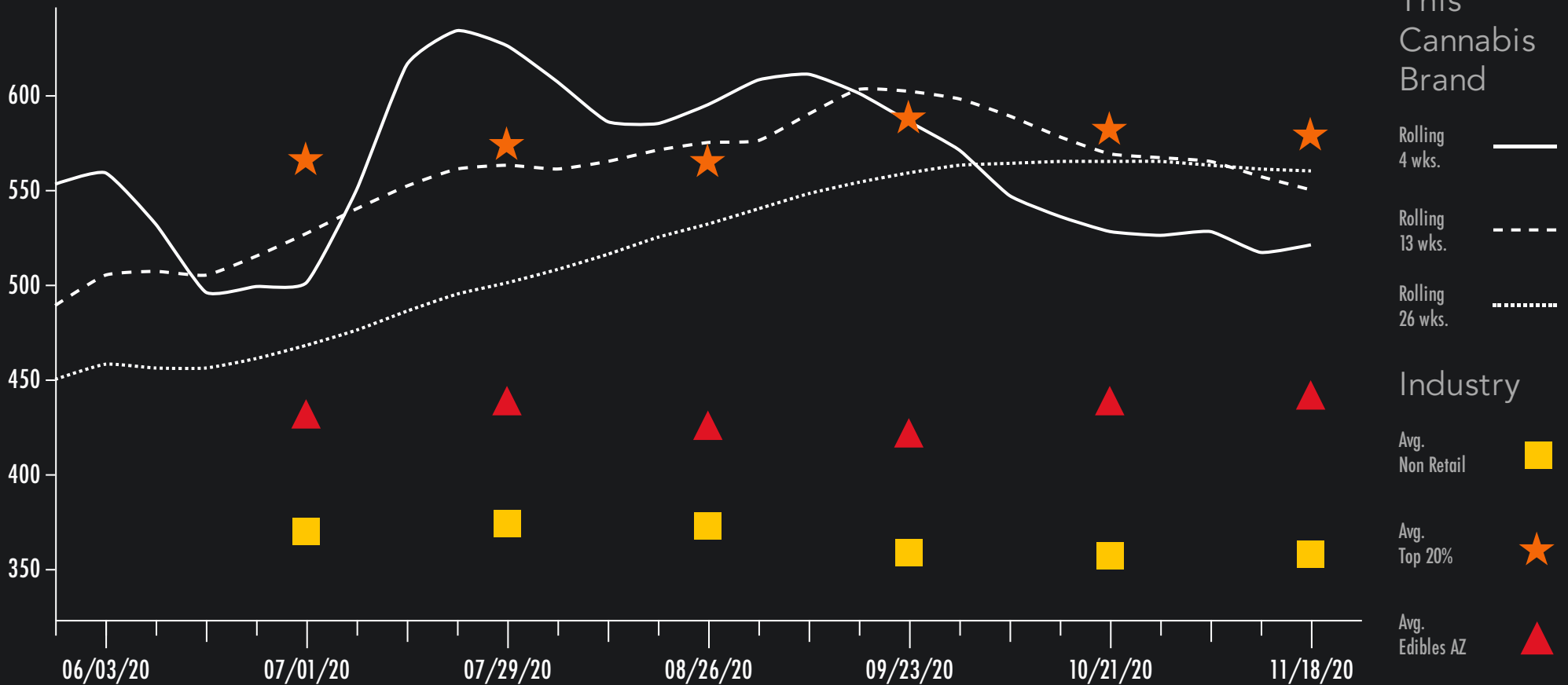


Score 535
vs. Week 43 + 18

Week 47
Week 43

Non Retail Index
#56 of 521 89%
#72 of 526 86%

Non Retail AZ
#9 of 38 76%
#11 of 39 72%



ABOUT MARKETING PERFORMANCE SCORECARDS

Pioneer Intelligence leverages data to benchmark marketing performance of consumer-facing cannabis brands. Our recently launched scorecards are designed to help industry stakeholders improve decision making by presenting actionable data across three pillars: social media, earned media, and web-related activities. Scorecards are published weekly for each of the more than 550 brands in our active brand pool and are available in Basic, Plus, and Premium formats.

Scorecards are product and state-specific, showing performance trends over time and against different subsets of competitors. For example, if a brand sells concentrates, vapor pens, and edibles in Michigan and Oklahoma, a Pioneer customer can choose the product form and state to see in a report. These selections do not change a brand's scores; they simply designate comparative segments.

Alongside numerical scores, Pioneer assigns a categorical label to indicate a brand's performance relative to all brands in the active brand pool. Labels are ascribed according to the following scale:

ELITE	96	–	100%
LEADING	91	–	95%
PRODUCING	67	–	90%
MIDDLING	34	–	66%
LAGGING	0	–	33%

Pioneer Intelligence scorecards support a number of industry verticals including brand operators, retail dispensaries, marketing service providers, and investors. We're fired up to take this first step and look forward to iterating our product to support evolving industry needs. For further information, including subscription details, please send an email to: info@pioneer.buzz



METHODOLOGY

Pioneer Intelligence explores marketing performance of licensed U.S. cannabis brands that sell cannabis products with a minimum of 0.3% THC. We track brand marketing performance across three pillars: social media, earned media, and web-related activities.

Our database grows weekly by more than 90,000 data points. At the conclusion of our designated Thursday to Wednesday week, we compare brand performance on each of 200 plus weighted features. Through dimension reduction, we produce pillar and sub pillar scores that are normalized onto a one-thousand point scale. These scores are presented as ranks and equivalent percentiles. While some source data values are direct, others are extrapolated; Pioneer increases accuracy of extrapolated data by taking the average of multiple data sources. Pioneer's source data comes from a group of globally-recognized, well-respected data providers.

At present, Pioneer Intelligence has more than 550 brands in our active brand pool and another 250 brands in our pipeline. Once we have six months of historical data, a pipeline brand can be activated. Lists of both active and pipeline brands can be found at pioneer.buzz/brands.

Pioneer Intelligence examines both absolute position and relative change. For example, in terms of Instagram Followers, absolute position compares the number of followers one brand account has against the number of followers from each of the other accounts in our active brand pool. Relative change compares the delta (growth or shrinkage) in follower count. In most cases, relative change includes three time periods: current week versus previous week (WoW), last 4 weeks versus preceding 4 weeks (MoM) and last 13 weeks versus preceding 13 weeks (QoQ).

When Pioneer Intelligence launched in June 2019, our scoring construct reflected brand marketing HEAT; we prioritized relative change over absolute position. Recently, we implemented a second scoring construct called STRENGTH; the weighting of this newer algorithm favors absolute position over relative change. HEAT and STRENGTH constructs are composed of nearly identical sets of features. HEAT scoring is available on all Pioneer scorecards. STRENGTH scoring can be found on the Premium-tiered scorecard.

In terms of its composition, Pioneer's Overall Index Score values social media and web activity performance closely. Earned media's value is less.

Neither our data sources nor our scoring algorithms are fixed. Pioneer Intelligence is continually expanding our data set and periodically adjusting our feature weightings in order to ensure we remain an effective, unbiased measure of brand marketing performance for the cannabis industry.



PILLARS AND SUB PILLARS DEFINED

Social Media

measures brand activity on select third party platforms. Scoring is derived primarily, but not exclusively, through analysis of Instagram (IG) activity. Valid IG data for a given week is included provided the account has posted within 60 days. Data limitations on Private IG accounts cap potential social scores below those operating other types of accounts.

Audience Size — calculation factors include follower base size and growth rate.

Audience Health — calculation factors include perceived share of real followers versus total followers; passion assessment based on follow-back activity; and follower base growth rate.

Engagement Rate — calculation factors include ratio of likes and comments versus number of followers; changes in aforementioned ratio of likes and comments versus number of followers; and quality of interactions, whereby comments are valued more than likes.

Earned Media

measures brand presence in online news. Calculation factors include publication reach, brand prominence and brand relevance within a given article as well as how an article is shared through social media. Our filters limit influence of market research papers, certain financial news and awareness gained through paid circulation of press releases. While we enjoy industry-leading coverage across U.S. media, not every publisher is included.

Impact — calculation factors include publication prominence (defined as to what extent is coverage coming from more recognized, national or international sources); brand mentions in an article title and brand mentions in an article's first paragraph.

Social Echo — calculation factors include a weighted number of shares a given article accumulates on Twitter, Facebook and Reddit platforms.

Web Activities

measures website traffic, visitor behavior as well as keyword and backlink profiles that can indicate a site's relative-strength.

Keywords — calculation factors include the number of, and change in, words or terms used to identify content on a webpage. Related to search queries, sites with strong keyword profiles typically generate more organic visits.

Backlinks — calculation factors include the number of, and change in, web links connecting to a brand's website from other websites. Backlink profiles generally reflect content quality and/or brand popularity. Backlinks drive traffic directly and also inform search engine results, thereby generating website visits indirectly. Backlink values vary based on link type and source.

Traffic — calculation factors include number of website visits -- segmented by device (desktop/mobile) and type (unique/total visits); website visits specifically through search and on-site behavior measurements (pages per visit, duration and bounce rate).



With a focus on consumer-facing cannabis brands, **Pioneer Intelligence** helps industry stakeholders better understand how marketing and communications strategies resonate with audiences.

We leverage a rich, growing data set to benchmark performance across three pillars: social media, earned media and web-related activities.

We are a group of experienced and passionate marketers, data scientists and engineers. Data collection for this project began in 2017.

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