



San Francisco Office of Cannabis

Presented by
San Francisco Office of Cannabis

02/16/2022

Agenda

- ▶ Employee and Wage Data for 2020
- ▶ Revenue and Sales Tax in 2019
- ▶ Expungements in 2020



Employee & Wage Data

Survey Responses, 2020

Operator Survey

SF Office of Cannabis Business Operator Survey

Cannabis Business and Permitting Information

The following several questions focus on general information about your business.

1. What is the name of your cannabis business?

2. Please provide the address of your business.

Street Address Line 1

Address Line 2

Zip

3. What type of cannabis business permit are you holding?

- ☐ Permanent Cannabis Business Permit (A)
- ☐ Temporary Cannabis Business Permit (A)
- ☐ Medical Cannabis Dispensary Permit (A)

4. How long has your cannabis business been operating?

- ☐ Less than 1 month
- ☐ 1 to 3 months

SF Office of Cannabis Business Operator Survey

Employee Information

A. Entry-Level Employees

The next set of questions ask about entry-level positions within your business. Examples of entry-level positions include:

- Budtender
- Cashier
- Receptionist/Front Desk Associate
- Delivery Driver
- Cannabis Flower Trimmer
- Greeter
- Packager
- Safety host/security guard
- Custodial staff
- Production/processing staff
- Cannabis Consultant

6. How many entry-level employees does your cannabis business have? (optional)

Full-Time (defined as working a minimum of 40 hours per week)

Part-Time (defined as working less than 40 hours per week)

SF Office of Cannabis Business Operator Survey

Employee Information

This next section asks questions about the employees and individuals who participate in the operation of your business. This section separates business participants into three categories:

A. Entry-Level Employees: Refers to roles that require little experience or related education. Examples include, but are not limited to, the following positions or similar positions:

- Budtender
- Cashier
- Receptionist/Front Desk Associate
- Delivery Driver
- Cannabis Flower Trimmer
- Greeter
- Packager
- Safety host/security guard
- Custodial staff
- Production/processing staff
- Cannabis Consultant

B. Operator-Level Employees: Refers to roles that may have management and supervisory duties, or may require technical knowledge, training, or related previous job experience. Examples include, but are not limited to, the following positions or similar positions:

- Accounting/Bookkeeping Manager
- Assistant Manager
- Communications Manager
- Cultivation Manager
- District Manager
- Floor Manager
- Internal Support Associate
- Inventory Manager
- Assistant Inventory Manager

C. Executive Officers: includes, but are not limited to, the following positions or similar positions: Chief Executive Officer

- Chief Financial Officer
- Chief Operating Officer
- Chief Technology Officer
- Chief People Officer/Human Resources
- President
- Vice President
- Treasurer
- Secretary

If an employee holds more than one of the above titles or roles, please only select the highest title that you hold. Please do not count the same individual in more than one employment category. For example: A **Manager** at your business who works onsite and sometimes runs the register (or takes on other "entry-level" tasks) should only be counted once as an "Operator-Employee."

Back

Next

Survey to Operators

▶ What:

- ▶ Business name/location
- ▶ Permit type
- ▶ Length of operation
- ▶ Employee information
 - ▶ Full-time/Part-time
 - ▶ Entry, Operator, and Executive Level
 - ▶ Wages
 - ▶ Demographic data

▶ Why:

- ▶ Gather data to inform the Cannabis Oversight Committee's priorities

Survey to Operators

▶ Who:

- ▶ ~141 Unique Cannabis Businesses/Operators (Permanent Permit Holders, Temporary Permit Holders, and MCD Dispensary Operators) in operation in 2020

▶ When:

- ▶ 1/25/2021-2/10/2021 (2.5 weeks)

▶ How:

- ▶ Via an online survey platform
- ▶ Developed by OOC and Resource Development Associates (RDA), and distributed and monitored by RDA
- ▶ Privacy measures: voluntary, confidential and data only analyzed in the aggregate, optional responses,
- ▶ RDA and OOC conducted comprehensive outreach:
 - ▶ Five rounds of general and targeted (for those who started the survey) follow-up emails and text communications by RDA, and targeted emails by the OOC

Survey Response Rate

- ▶ Approximately 52 operators participated
 - ▶ Some partially completed; others fully completed
 - ▶ All self-reported responses
- ▶ On the whole, participants were more likely to complete general information questions and less willing to provide demographic data
- ▶ A range of businesses provided complete responses to the variety of employee-related and demographic questions
 - ▶ By size, this response cohort represents a snapshot of the larger cannabis industry
 - ▶ 6 “small-sized” businesses (1-4 employees)
 - ▶ 16 “medium-sized” businesses (5-9 employees)
 - ▶ 5 “large-sized” businesses (10 or >)

Definitions

- ▶ **Entry-Level:** Refers to roles that require little experience or related education.
 - ▶ Budtender, Cashier, Receptionists/Front Desk Associate, Delivery Driver, Cannabis Flower Trimmer, Greeter, etc...
- ▶ **Operator-Level:** Refers to roles that may have management and supervisory duties, or may require technical knowledge, training, or related previous job experience.
 - ▶ Accounting/Bookkeeping Manager, Assistant Manager, Cultivation Manager, District Manager, Floor Manager, Internal Support Associate, etc...
- ▶ **Executive-Level:**
 - ▶ Chief Executive Officer, Chief Financial Officer, Chief Technology Officer, President, Vice, President, etc...
- ▶ **Full-Time:** Working a minimum of 40 hours per week
- ▶ **Part-Time:** Working less than 40 hours per week

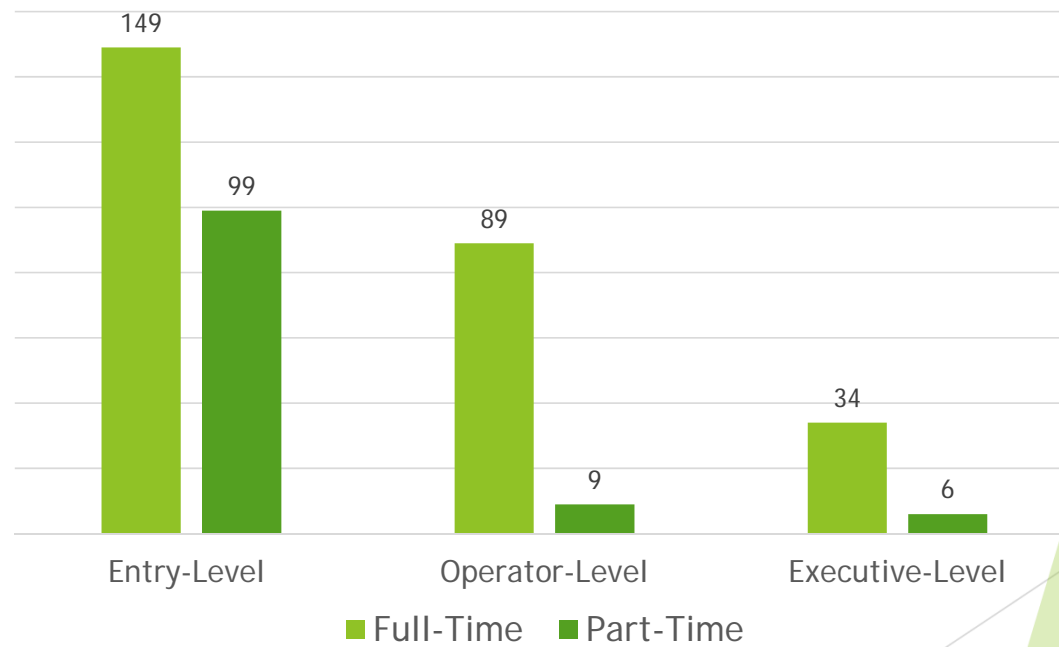
Self-Reported Number of Employees by Job Type and Employment Status

27

Cannabis
Businesses
Reported
Employing

386

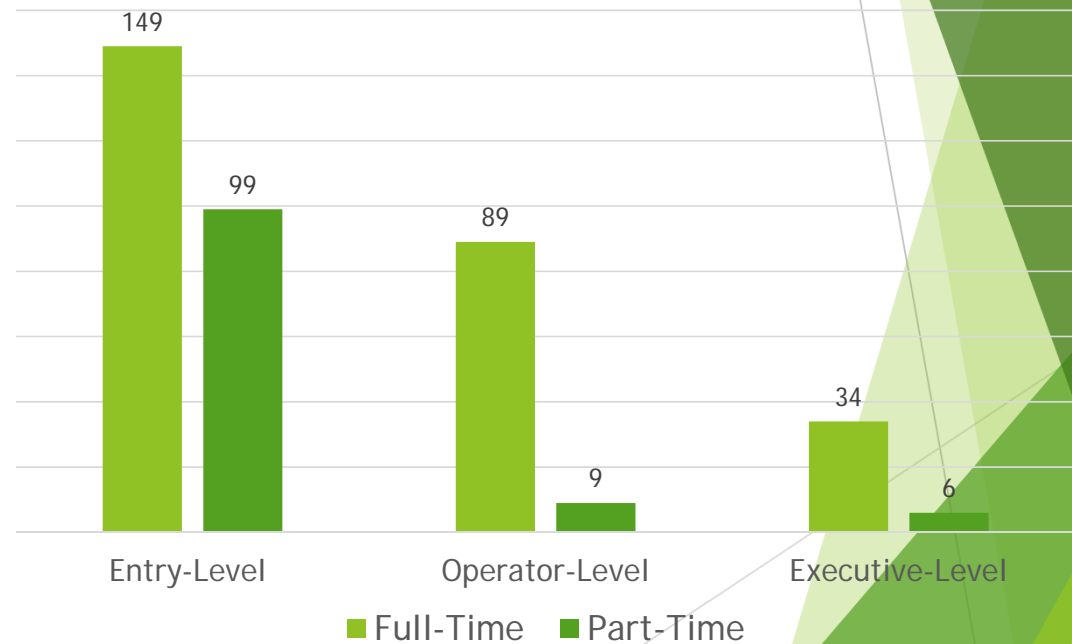
Employees



Self-Reported Number of Employees by Job Type and Employment Status

Key Takeaways:

- A little under half of all employees working across the 27 cannabis businesses that participated in this survey hold entry-level, full-time positions.
- The next most staffed positions are part-time entry level jobs, and operator-level positions.



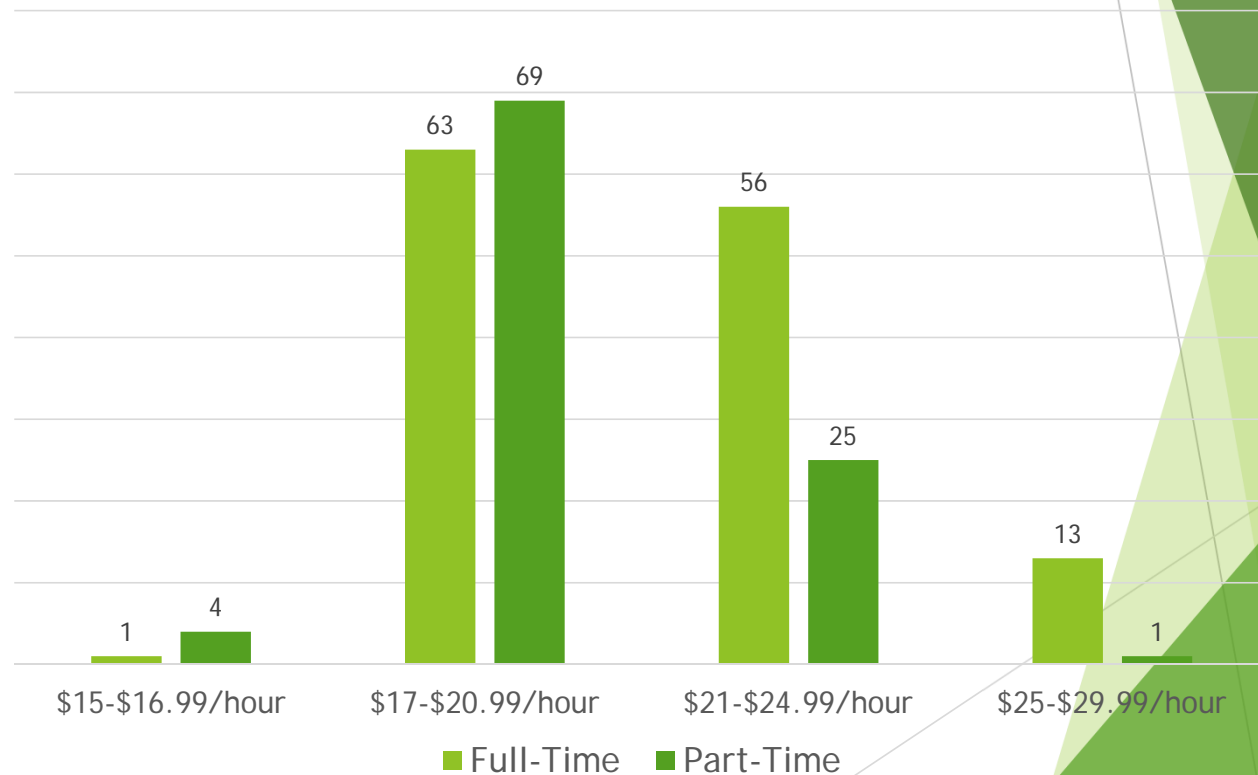
Self-Reported Wages of Entry-Level Employees

26

Cannabis
Businesses
Reported
Employing

232

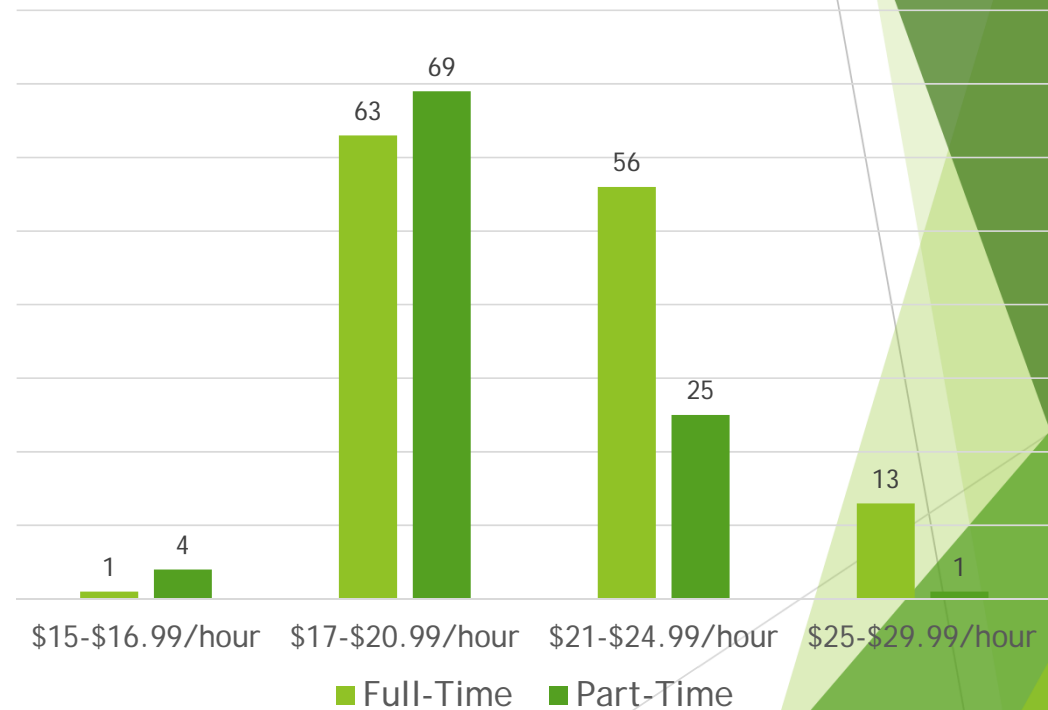
Entry-Level
Employees



Self-Reported Wages of Entry-Level Employees

Key Takeaways:

- Approximately 51% are full-time employees making between \$17-\$24.99/hour.
- Approximately 40% are part-time employees earning within the same range, with the majority making between \$17-\$20.99/hour.
- The majority of individuals, part-time or full-time, earn between \$17-\$20.99/hour.



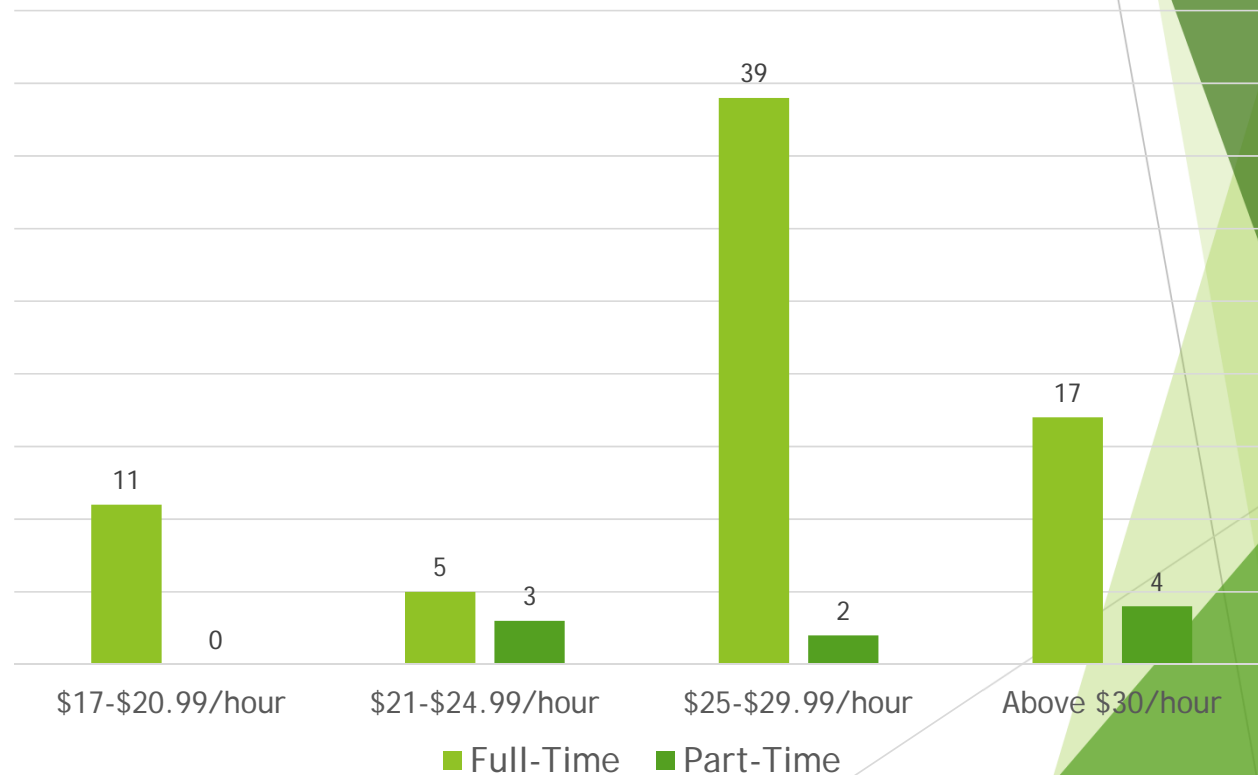
Self-Reported Wages of Operator-Level Employees

21

Cannabis
Businesses
Reported
Employing

81

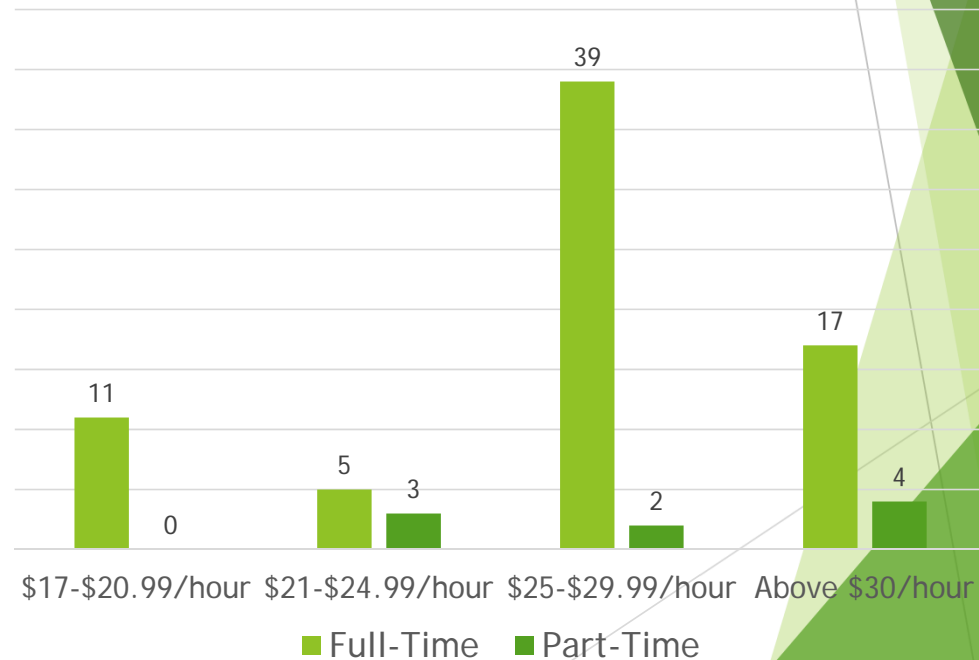
Operator-Level
Employees



Self-Reported Wages of Operator-Level Employees

Key Takeaways:

- Nearly 90% of all operators are full-time employees.
- Almost 70% of all operators are full-time employees and earn \$25/hour or more .
- Almost half of all of the operators that are full time earn between \$25-\$29.99/hour.



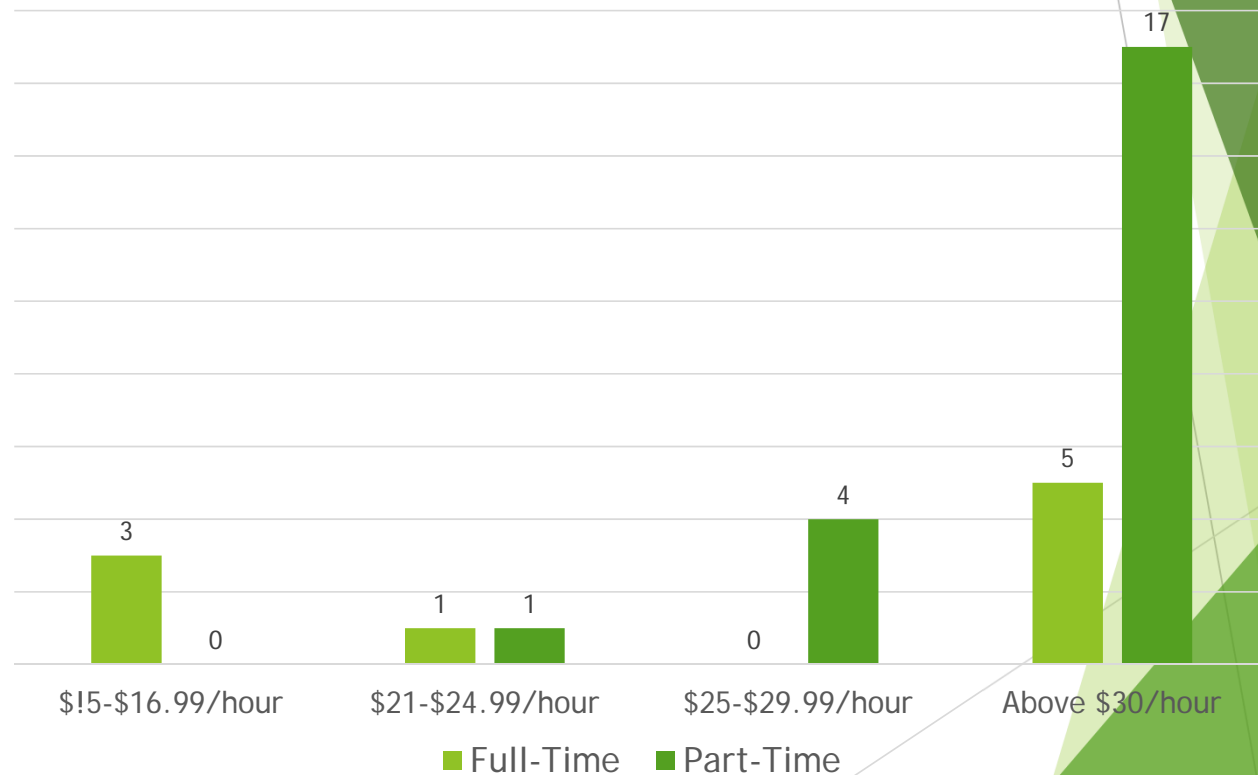
Self-Reported Salaries and Wages of Executive-Level Employees

20

Cannabis
Businesses
Reported
Employing

31

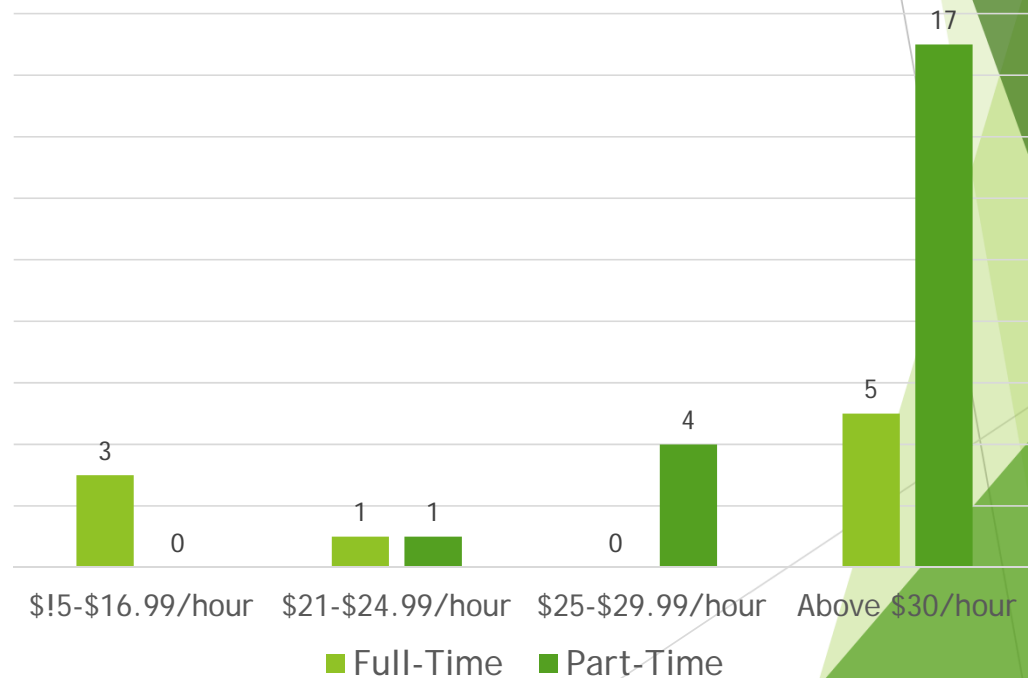
Executive-Level
Employees



Self-Reported Salaries and Wages of Executive-Level Employees

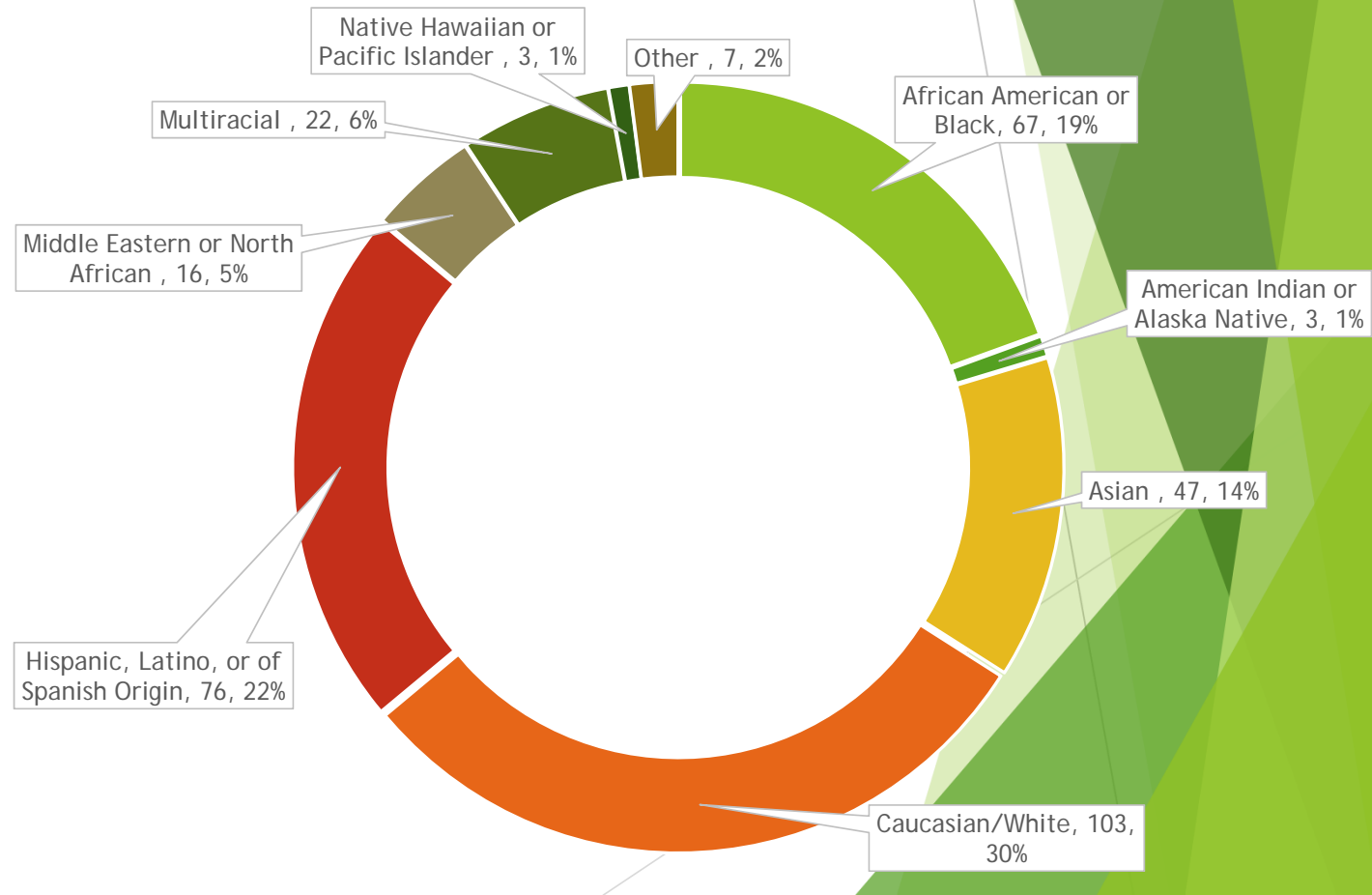
Key Takeaways:

- Nearly 71% of all Executive-Level employees are part-time employees (unlike w/operators).
- The majority of part-time Executive-Level employees earn above \$30/hour.



Self-Reported Demographic Data by Race for Employees for All Job Types

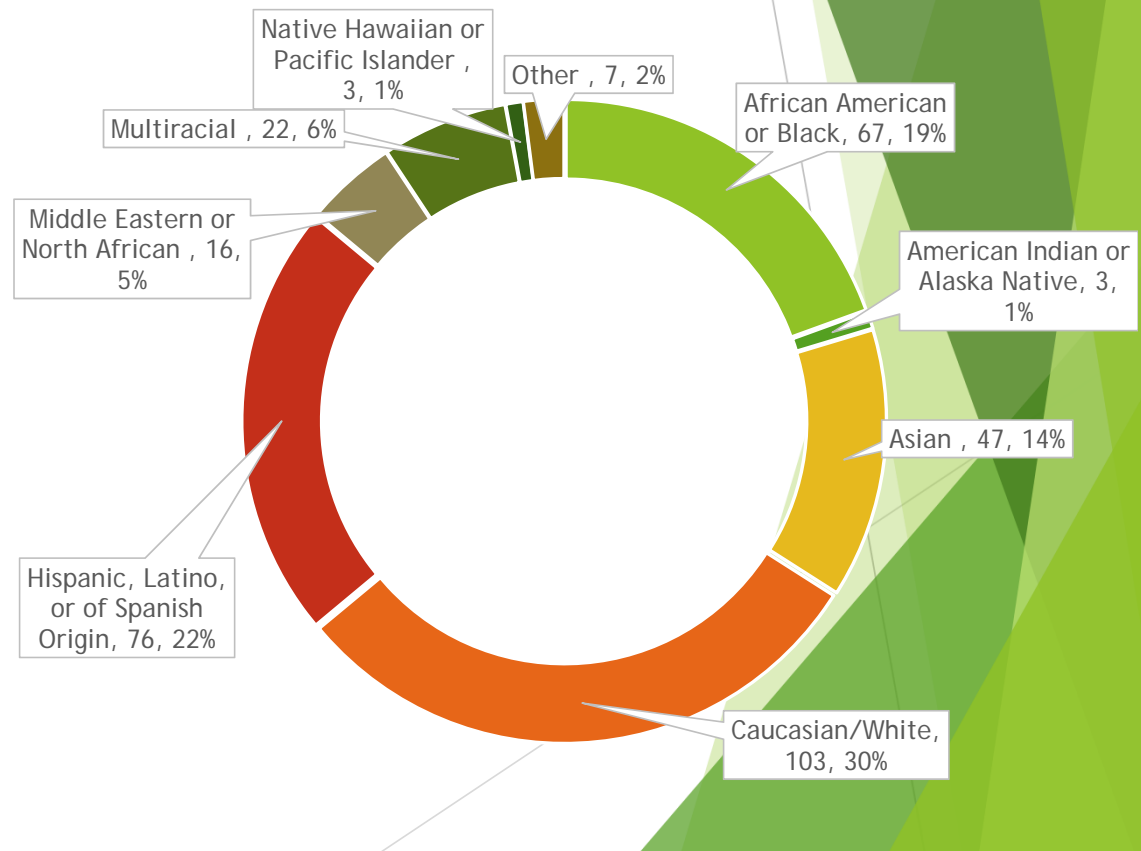
25
Cannabis
Businesses
Reported
Demographic Data
for
344
Employees



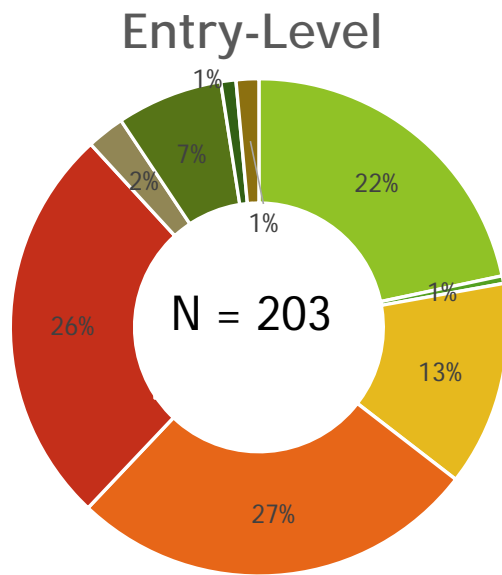
Self-Reported Demographic Data by Race for Employees for All Job Types

Key Takeaways:

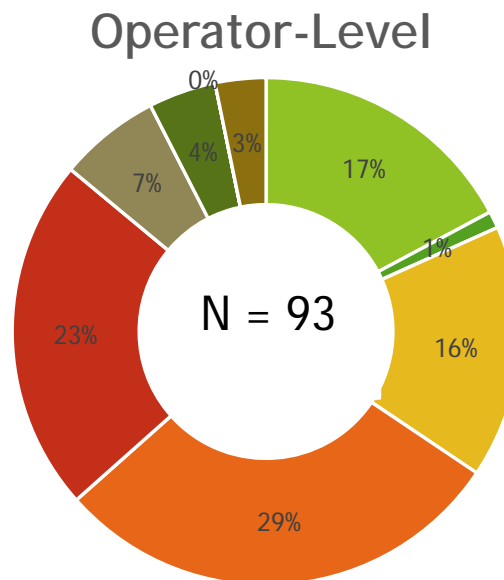
- The three most represented racial groups of employees are African American or Black at 19%, Caucasian/White At 30%, and Hispanic, Latino or of Spanish Origin at 22%.
- The least representative groups by race are American Indian or Alaska Native at 1%, Native Hawaiian or Pacific Islander at 1% and Other at 2%.



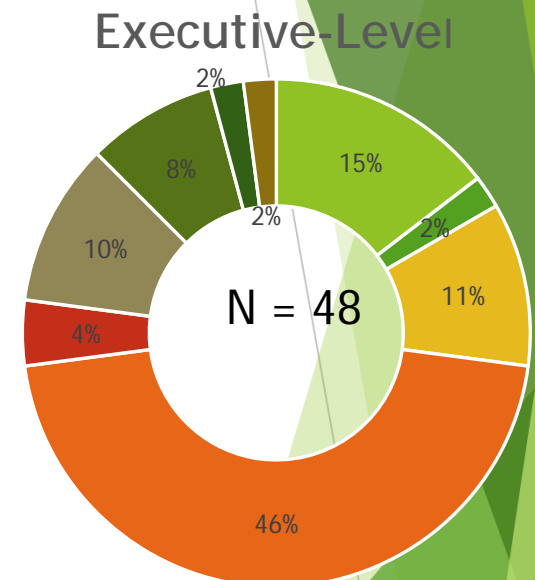
Self-Reported Demographic Data by Race for Employees By Job Types



- African American or Black
- Asian
- Hispanic, Latino, or of Spanish Origin
- Multiracial
- Other



- American Indian or Alaska Native
- Caucasian/White
- Middle Eastern or North African
- Native Hawaiian or Pacific Islander



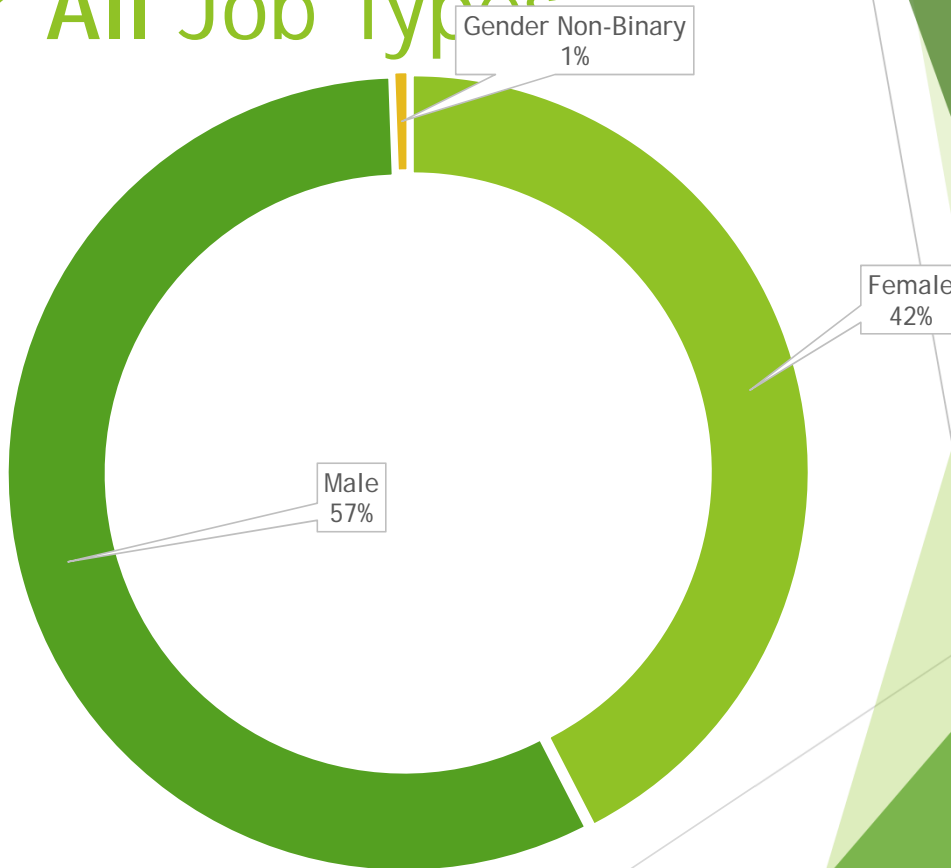
Self-Reported Demographic Data by Race for Employees By Job Types

Key Takeaways:

- For African American or Black employees, representation decreases from Entry-Level to Operator-Level to Executive-Level positions from 22% to 17% to 15%.
- For Hispanic, Latino or of Spanish origin employees, the decrease is more pronounced from 26% to 23% to 4%.
- The reverse trend occurs for Caucasian/White employees. This group's percentages increases from 27% to 29% to 46%.
- In general, there is limited representation of American Indian or Alaska Native, Middle Eastern or North African, Multiracial, Native Hawaiian or Pacific Islander, and Other groups.

Self-Reported Demographic Data by Gender for Employees for All Job Types

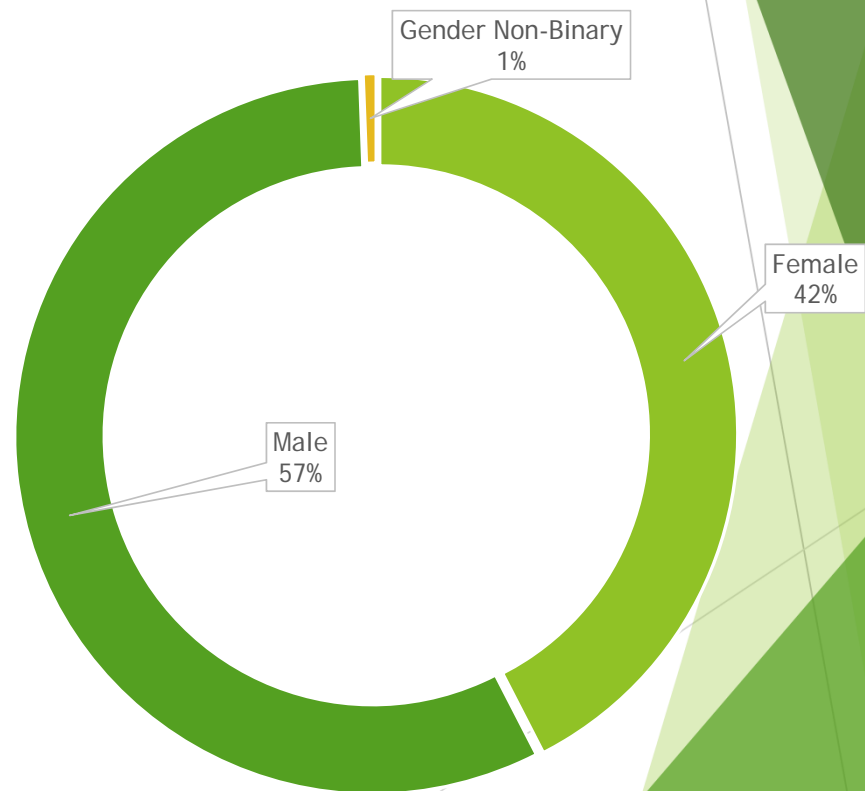
25
Cannabis
Businesses
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Demographic Data
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344
Employees



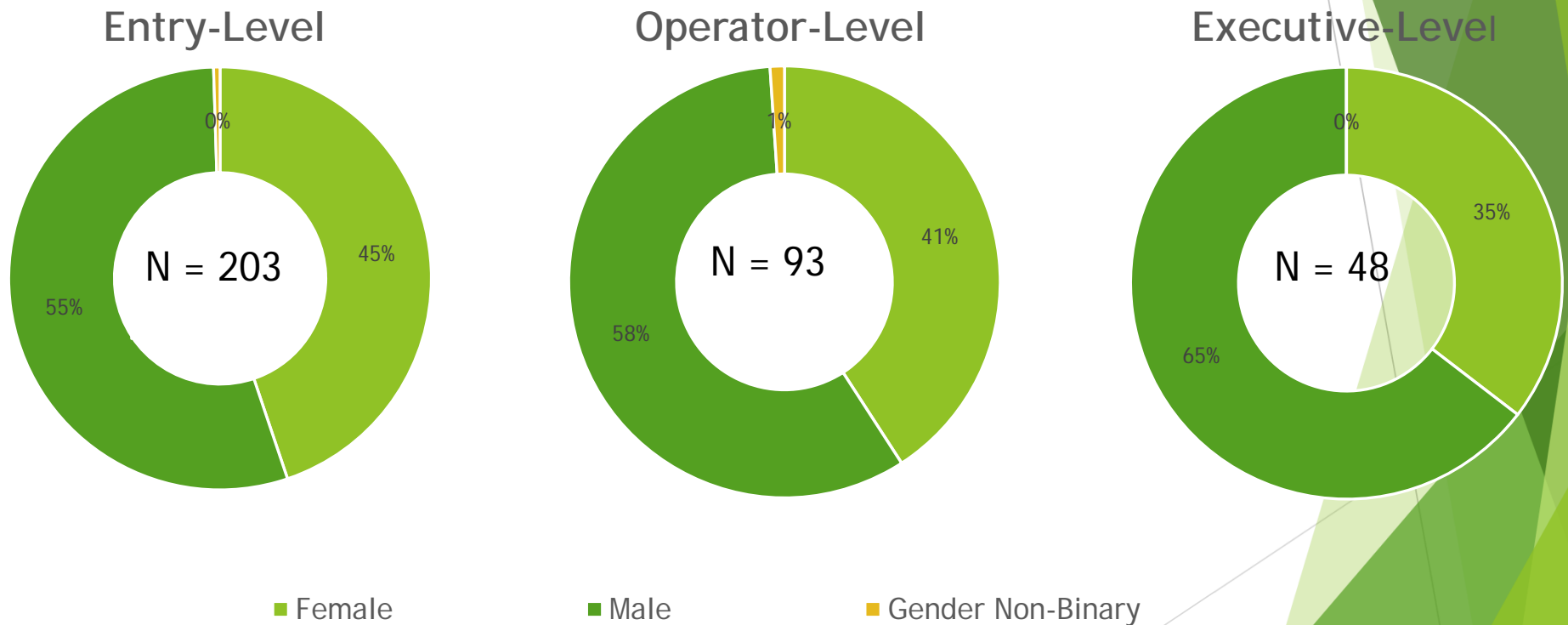
Self-Reported Demographic Data by Gender for Employees for All Job Types

Key Takeaways:

- Nearly 60% of all employees across the 25 businesses that provided demographic data are male.



Self-Reported Demographic Data by Gender for Employees By Job Types



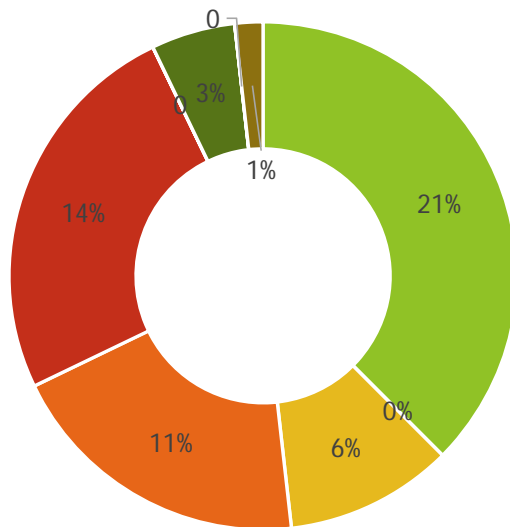
Self-Reported Demographic Data by Gender for Employees By Job Types

Key Takeaways:

- Across Entry-Level and Operator-Level positions, females are less represented compared to males; they hold between 40%-45% of these positions.
- At the Executive-Level positions, the disparity between male and female employees becomes more pronounced with males holding 65% of the Executive-Level positions.

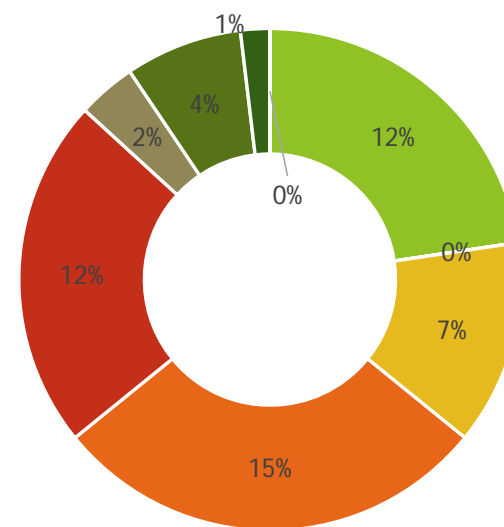
Self-Reported Demographic Data by Race and Gender for Entry-Level Positions (N = 203)

Female (45%)



- African American or Black
- Asian
- Hispanic, Latino, or of Spanish Origin
- Multiracial
- Other

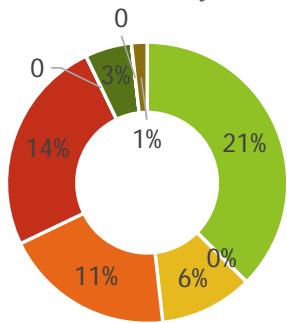
Male (55%)



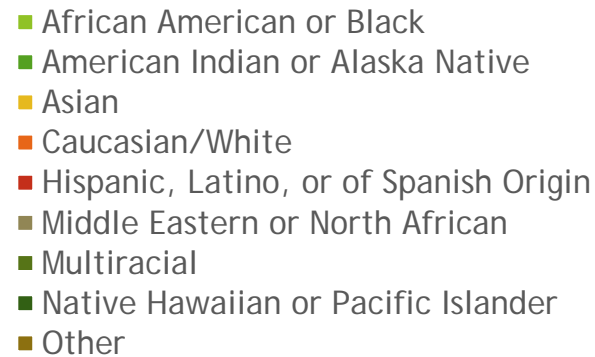
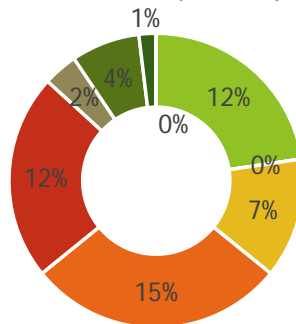
- American Indian or Alaska Native
- Caucasian/White
- Middle Eastern or North African
- Native Hawaiian or Pacific Islander

Self-Reported Demographic Data by Race and Gender for Entry-Level Positions (N = 203)

Female (45%)



Male (55%)

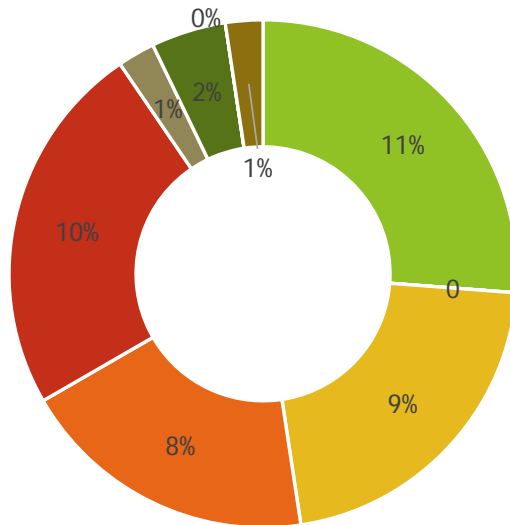


Key Takeaways:

- African-American or Black female employees are the most represented, followed by Caucasian/White males, and Hispanic, Latino or of Spanish Origin female and male employees.
- There is very limited representation of American Indian or Alaska Native, Middle Eastern or North African, Multiracial, Native Hawaiian or Pacific Islander, and Other groups.

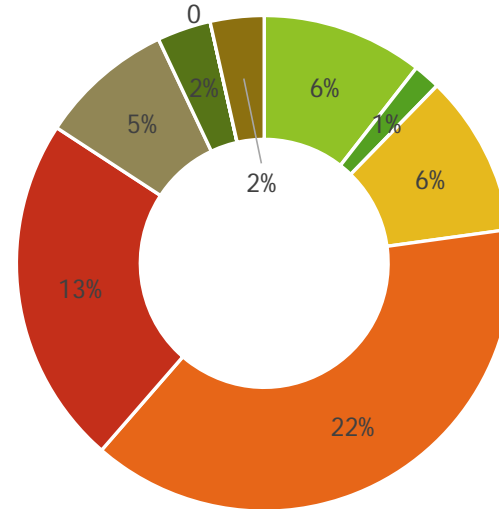
Self-Reported Demographic Data by Race and Gender for Operator-Level Positions (N = 93)

Female (41%)



- African American or Black
- Asian
- Hispanic, Latino, or of Spanish Origin
- Multiracial
- Other

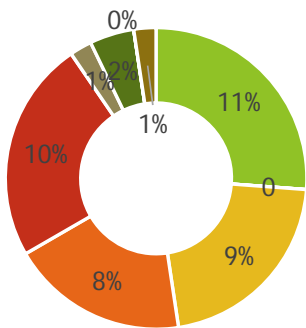
Male (58%)



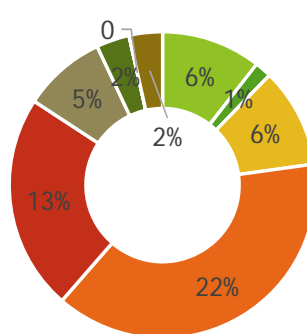
- American Indian or Alaska Native
- Caucasian/White
- Middle Eastern or North African
- Native Hawaiian or Pacific Islander

Self-Reported Demographic Data by Race and Gender for Operator-Level Positions (N = 93)

Female (41%)



Male (58%)



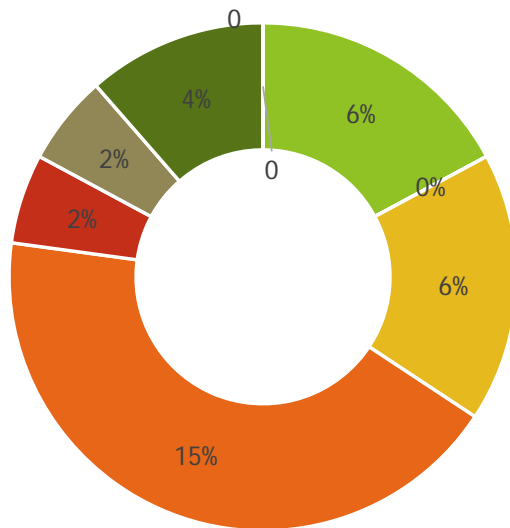
- African American or Black
- American Indian or Alaska Native
- Asian
- Caucasian/White
- Hispanic, Latino, or of Spanish Origin
- Middle Eastern or North African
- Multiracial
- Native Hawaiian or Pacific Islander
- Other

Key Takeaways:

- Caucasian/White male employees are the most represented, followed by Hispanic, Latino or of Spanish Origin males, then African American or Black females, followed by Hispanic, Latino, or of Spanish Origin females.
- African American or Black male employees were the 7th most represented group, along with Asian males.
- There is very limited representation of American Indian or Alaska Native, Middle Eastern or North African, Multiracial, Native Hawaiian or Pacific Islander, and Other groups.

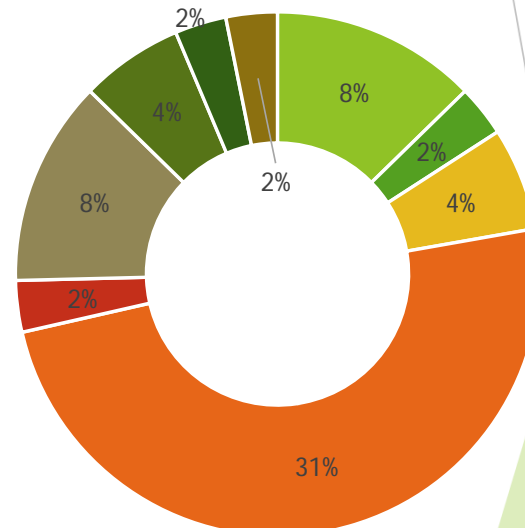
Self-Reported Demographic Data by Race and Gender for Executive-Level Positions (N = 48)

Female (35%)



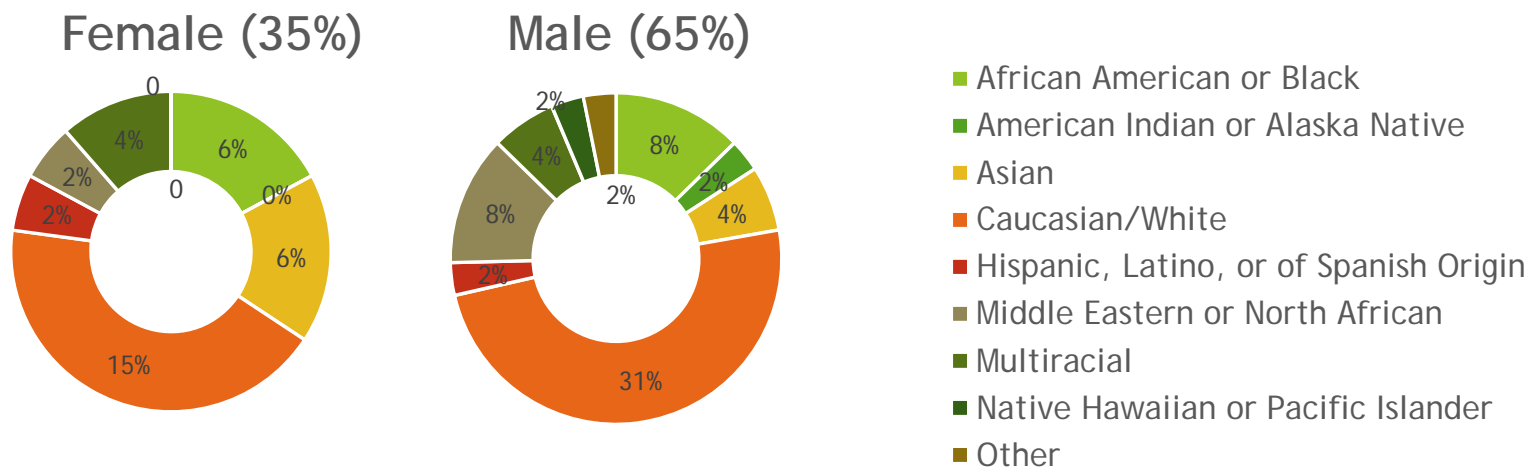
- African American or Black
- Asian
- Hispanic, Latino, or of Spanish Origin
- Multiracial
- Other

Male (65%)



- American Indian or Alaska Native
- Caucasian/White
- Middle Eastern or North African
- Native Hawaiian or Pacific Islander

Self-Reported Demographic Data by Race and Gender for Executive-Level Positions (N = 48)



Key Takeaways:

- Caucasian/White male employees are the most represented, followed by Caucasian/White females, followed by African American or Black and Middle Eastern or North African Males, followed by African American or Black and Asian females.
- Significant drop in representation of Hispanic, Latino or other Spanish origin male and female employees; noticeable increase in Caucasian/White representation.
- Very limited representation of American Indian or Alaska Native, Middle Eastern or North African, Multiracial, Native Hawaiian or Pacific Islander, and Other groups.

Total Revenue & Sales Tax

2019

Key Points Re: Total Revenue Generated in 2019 by Permitted Cannabis Businesses

- ▶ Most complete available data is for 2019 (calendar year); same data unavailable for 2020
- ▶ How is total revenue calculated
 - ▶ Using sales tax data (Bradley Burns 1% sales tax)
- ▶ Where does the data come from?
 - ▶ Office of the Controller
- ▶ How accurate is this estimate?
 - ▶ It is an estimate; revenue data is not reported to the Office of the Controller or Treasure and Tax Collector's Office
 - ▶ Calculated based on self-reported sales tax revenue
 - ▶ Includes ~127 cannabis businesses registered with the City
 - ▶ If the business engaged in commercial transactions, the figure will account for the underlying revenue
 - ▶ If a business does not collect and submit sales tax, then this estimate would underestimate the sales in 2019.
 - ▶ Includes 1 cannabis business with a permanent permit, MCDs, and businesses with temporary permits

Total Revenue Generated in 2019 by Permitted Cannabis Businesses

~\$237,448,500.00

Sales Tax Revenue Generated by Permitted Cannabis Businesses in 2019

- ▶ Data provided by the Office of the Controller
- ▶ The most complete data is for 2019 (calendar year)
- ▶ Captures data from 127 businesses
 - ▶ Some of these businesses were not operational
 - ▶ Some of these businesses were operational for varying timelines in 2019

Sales Tax Revenue Generated by Permitted Cannabis Businesses in 2019

2019 Cannabis-Related Sales Tax

Permit Type	Total
Article 16 Perm. Permit Holder	\$3,780
Article 16 Temp. Permit Holder	\$277,115
Article 33 Permit Holder	\$2,093,590
Total	\$2,374,485

Expungement of Cannabis Convictions

2020

Cannabis Conviction Expungements in 2020

N/A*

Question: How?

Answer: In February 2019, the San Francisco District Attorney's Office cleared a total of 9,363 marijuana-related convictions dating back to 1975. In addition, the SFDA's Office also undertook efforts to reclassify thousands of marijuana-related offenses.

For more information, please visit the District Attorney's [press release](#).

*According to the San Francisco District Attorney's Office.



Thank You!

If you have any questions, please contact us at:

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