



## CROO 2023 Diversity Survey

The Cannabis Regulation and Tax Act (410 ILCS 705/7-30) mandates the Cannabis Regulation Oversight Officer (CROO) survey the Illinois cannabis industry annually to assess the diversity of the owners and employees in the industry, as well as the contractors/subcontractors working with the industry.

Most recently, CROO sent two separate surveys in May 2023: a mandatory survey for cannabis companies to complete and a voluntary survey for cannabis employees. The goal was to achieve maximum participation from both. The survey was sent to every company that operates a cannabis license (or multiple licenses), and every individual who is on record as having a cannabis employee license. Anonymous links were sent to companies to distribute to their employees and State inspectors provided QR codes linking to the employee survey.

Answers were received through October 2023, with most provided before August 2023.

### **Key Results and Changes from 2020 to 2023:**

- Diversity has increased among cannabis companies in Illinois (categorized by the majority equity of company ownership):<sup>1</sup>
  - Black-owned companies increased from 0% to 27%
  - Latino, Latina, or Hispanic-owned companies from 0% to 5%
  - Asian-owned companies from 0% to 3%
  - A coalition of non-White owners with no one race or ethnicity holding the majority from 0% to 14%
  - Women-owned companies from 3% to 16%
- Diversity has increased among cannabis owners:<sup>2</sup>
  - Black owners from 1% to 26%
  - Latino, Latina, or Hispanic owners from 1% to 7%
  - Asian owners from an unknown number to 5%
  - Middle Eastern or North African people from an unknown number to 2%
  - Women owners from 18% to 25%

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<sup>1</sup> Counting each company once (*i.e.*, a company with several owners who hold equity is categorized by the race of the owners who hold 51% or more equity).

<sup>2</sup> Counting each person who holds more than 5% equity separately (*i.e.*, a person who owns 5% is counted the same as a person owning 95% of a company).

- Diversity has increased on boards of directors and in the C-suite of cannabis businesses
  - For directors:
    - From 6% to 20% of directors are Black people
    - From 2% to 5% of directors are Latino, Latina, or Hispanic people
    - From 1% to 6% of directors are Asian people
    - From 17% to 22% of directors on boards are women
  - For executives:
    - From 1% to 19% of executives are Black people
    - There has been no change (5%) of Latino, Latina, or Hispanic executives
    - From 2% to 6% of executives are Asian people
    - There has been no change (roughly 26%) of women executives
- Diversity has increased among frontline cannabis employees
  - Black representation did not change year-over-year at 10%
  - Latino, Latina, or Hispanic representation increased from 5% to 11%
  - Asian representation increased from 1% to 2%
- For cannabis employees, the CROO Diversity Survey uncovered additional data in 2023:
  - 3% are veterans
  - 7% have a disability
  - 7% have been or have had a family member arrested, convicted, or adjudicated delinquent on a cannabis-related offense
  - 2% have been incarcerated
  - 16% identify as part of the LGBTQIA+ community
  - 2% identify as transgender

Full results are shown below. Importantly, the results here are shown as provided by the companies and employees responding to the survey. Responses that left questions blank or selected unknown or prefer not to answer options are included where possible (completely blank employee surveys were excluded but all others included). Company responses were not verified but accepted as accurate.

The key results are on sensitive identity-related topics (race, gender, disability, criminal justice involvement, etc.) and may be underreported. Companies may or may not know how their owners, directors, or executives would self-identify but still provided answers to CROO. The survey responses may not be representative of the total cannabis industry in Illinois (*i.e.*, some small companies may not have responded; race, gender, or special statuses of owners might not be known to company leaders; some segment of employees may not have responded; etc.). However, the results are the most accurate information available.

### **Company Survey:**

The company survey was sent to 227 companies who own cannabis licenses in the State. Some of the companies own multiple licenses and license types, while others have only one license. Some companies completed more than one survey due to corporate structures that are related but ownership differed sufficiently to require two surveys.

Complete responses were received from 132 separate companies representing roughly 224 different licenses in Illinois. Substantial responses were received from almost every licensee.

CROO worked with the licensing agencies (Department of Agriculture and Department of Financial and Professional Regulation) to get contact information for every company. Because companies sometimes provide contact information for each license held by the company, CROO worked with the contacts to find the correct entity to reply to the survey. Proof of completion is required by the licensing agencies for license renewal. CROO reviewed each response to verify enough usable information was received. Finally, as the survey was active over the summer of 2023, several new social equity licensees began operations and therefore may not have participated.

Key questions on the company survey involved demographics of ownership, board of directors, and executives, as well information about the company, the licensing process, and financial and other barriers to operations. Every company was also asked questions that support the Cannabis Disparity and Availability Study.

### **Employee Survey:**

The employee survey was sent to nearly 10,000 email addresses of employees connected to the Illinois cannabis industry. CROO attempted to reach as broad an audience as possible.

2,307 people responded to the survey (roughly 25%). Roughly 200 responses were excluded because most questions were left blank. Employees reported working in over 90 different companies, capturing perspectives from big and small companies.

Each response was provided voluntarily and anonymously. Of the respondents, 9% identified their workplace as a cannabis company's headquarters/corporate office, 26% in a cultivation center, 45% in a dispensary, the remainder in infusers, laboratories, transporters, or left the question blank. Almost all reported they worked in Illinois.

Over 50% (1,255) of the respondents stated they were taking the survey for the first time, while 20% (447) had previously taken the survey. The remainder were unsure or left the question blank.

### **Vendor Survey:**

The law requires CROO to also examine subcontractors and vendors in the cannabis industry. CROO gathered information from companies about their major vendors and is preparing additional questions for these businesses.

Cannabis Industry Demographics: CROO Diversity Survey Results

Race	2020	2021	2023
<b>Majority Owners</b>	<b>99%</b>	<b>100%</b>	<b>100%</b>
White	88%	46%	50%
Black	1%	25%	26%
Latinx / Hispanic	1%	8%	7%
Asian	-	4%	5%
Middle East/North African	-	-	2%
Additional Races / 2+ Races	0%	4%	5%
Unknown	9%	13%	5%
<b>Minority Owners</b>	<b>99%</b>	<b>100%</b>	<b>100%</b>
White	71%	49%	58%
Black	0%	16%	13%
Latinx / Hispanic	13%	3%	3%
Asian	2%	3%	6%
Middle East/North African	-	-	0%
Additional Races / 2+ Races	2%	3%	1%
Unknown	11%	26%	19%
<b>Board of Directors</b>	<b>101%</b>	<b>98%</b>	<b>100%</b>
White	90%	57%	65%
Black	6%	15%	20%
Latinx / Hispanic	2%	4%	5%
Asian	1%	3%	6%
Middle East/North African	-	2%	1%
Additional Races / 2+ Races	1%	2%	1%
Unknown	1%	15%	2%
<b>C-Suite Executives</b>	<b>100%</b>	<b>99%</b>	<b>100%</b>
White	80%	53%	61%
Black	1%	16%	19%
Latinx / Hispanic	5%	5%	5%
Native American/Native Hawaiian	-	1%	-
Asian	2%	4%	6%
Middle East/North African	-	4%	2%
Additional Races / 2+ Races	1%	3%	4%
Unknown	11%	13%	3%
<b>Senior Managers</b>	<b>101%</b>	<b>97%</b>	<b>100%</b>

Gender	2020	2021	2023
<b>Majority Owners</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	82%	70%	70%
Women	18%	19%	25%
Nonbinary	0%	0%	0%
Unknown	0%	11%	5%
<b>Minority Owners</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	71%	59%	64%
Women	29%	19%	23%
Nonbinary	0%	0%	0%
Unknown	0%	22%	13%
<b>Board of Directors</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	83%	67%	72%
Women	17%	20%	22%
Nonbinary	0%	0%	0%
Unknown	0%	13%	6%
<b>C-Suite Executives</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	71%	57%	71%
Women	27%	18%	26%
Nonbinary	0%	0%	2%
Unknown	2%	25%	1%
<b>Senior Managers</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

White	70%	69%	72%
Black	8%	7%	11%
Latinx / Hispanic	4%	9%	3%
Asian	3%	4%	2%
Middle East/North African	-	-	2%
Additional Races / 2+ Races	2%	1%	2%
Unknown	14%	7%	8%
<b>Supervisors / Middle Managers</b>	<b>101%</b>	<b>99%</b>	<b>100%</b>
White	55%	69%	64%
Black	7%	7%	6%
Latinx / Hispanic	3%	12%	11%
Asian	-	3%	2%
Middle East/North African	-	-	0%
Additional Races / 2+ Races	2%	1%	2%
Unknown	34%	7%	15%
<b>Frontline Employees</b>	<b>101%</b>	<b>97%</b>	<b>100%</b>
White	49%	64%	52%
Black	10%	9%	9%
Latinx / Hispanic	5%	13%	11%
Asian	1%	2%	2%
Middle East/North African	-	-	1%
Additional Races / 2+ Races	3%	1%	2%
Unknown	33%	8%	23%
<b>Frontline (Part-Time)</b>	<b>101%</b>		
White	47%	-	-
Black	21%	-	-
Additional Races / 2+ Races	3%	-	-
Unknown	30%	-	-
<b>Illinois - Statewide</b>	<b>100%</b>	<b>102%</b>	<b>101%</b>
White	61%	60%	60%
Black	15%	15%	15%
Latinx / Hispanic	18%	18%	18%
Asian	2%	6%	6%
Middle East/North African	-	-	1%
Additional Races / 2+ Races	2%	3%	1%
Unknown	2%	0%	0%
<b>Majority-Owned Firms</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
White	100%	26%	31%
Black	0%	25%	27%

Men	57%	52%	44%
Women	38%	43%	45%
Nonbinary	1%	0%	2%
Unknown	4%	5%	9%
<b>Supervisors / Middle Managers</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	50%	47%	46%
Women	31%	46%	40%
Nonbinary	1%	3%	2%
Unknown	18%	4%	12%
<b>Frontline Employees</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	42%	44%	37%
Women	32%	48%	37%
Nonbinary	1%	4%	4%
Unknown	25%	4%	22%
<b>Frontline (Part-Time)</b>	<b>100%</b>		
Men	39%	-	-
Women	51%	-	-
Nonbinary	1%	-	-
Unknown	9%	-	-
<b>Illinois - Statewide</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	49%	49%	49%
Women	51%	51%	51%
Nonbinary	0%	0%	-
Unknown	-	0%	-
<b>Majority-Owned Firms</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	97%	50%	69%
Women	3%	12%	16%

Coalition of Minority Races	-	14%	14%
Latinx / Hispanic	0%	5%	5%
Asian	0%	2%	3%
Additional Races / 2+ Races	0%	2%	2%
Unknown	0%	27%	18%

Nonbinary	0%	0%	0%
Unknown	-	38%	15%

## Cannabis Diversity Survey Results

Race	2020	2021	2023
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Asian	2%	3%	6%
Middle East/North African	-	-	0%
Additional Races / 2+ Races	2%	3%	1%
Unknown	11%	26%	19%
<b>Board of Directors</b>	<b>101%</b>	<b>98%</b>	<b>100%</b>
White	90%	57%	65%
Black	6%	15%	20%
Latinx / Hispanic	2%	4%	5%
Asian	1%	3%	6%
Middle East/North African	-	2%	1%
Additional Races / 2+ Races	1%	2%	1%
Unknown	1%	15%	2%
<b>C-Suite Executives</b>	<b>100%</b>	<b>99%</b>	<b>100%</b>
White	80%	53%	61%
Black	1%	16%	19%
Latinx / Hispanic	5%	5%	5%
Native American/Native Hawaiian	-	1%	-
Asian	2%	4%	6%
Middle East/North African	-	4%	2%

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Race	2020	2021	2023
Additional Races / 2+ Races	1%	3%	4%
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<b>Senior Managers</b>	<b>101%</b>	<b>97%</b>	<b>100%</b>
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Asian	-	3%	2%
Middle East/North African	-	-	0%
Additional Races / 2+ Races	2%	1%	2%
Unknown	34%	7%	15%
<b>Frontline Employees</b>	<b>101%</b>	<b>97%</b>	<b>100%</b>
White	49%	64%	52%
Black	10%	9%	9%
Latinx / Hispanic	5%	13%	11%
Asian	1%	2%	2%
Middle East/North African	-	-	1%
Additional Races / 2+ Races	3%	1%	2%
Unknown	33%	8%	23%
<b>Frontline (Part-Time)</b>	<b>101%</b>		
White	47%	-	-
Black	21%	-	-
Additional Races / 2+ Races	3%	-	-
Unknown	30%	-	-
<b>Illinois - Statewide</b>	<b>100%</b>	<b>102%</b>	<b>101%</b>
White	61%	60%	60%
Black	15%	15%	15%
Latinx / Hispanic	18%	18%	18%
Asian	2%	6%	6%
Middle East/North African	-	-	1%
Additional Races / 2+ Races	2%	3%	1%

Gender	2020	2021	2023
<b>Senior Managers</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
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Men	42%	44%	37%
Women	32%	48%	37%
Nonbinary	1%	4%	4%
Unknown	25%	4%	22%
<b>Frontline (Part-Time)</b>	<b>100%</b>		
Men	39%	-	-
Women	51%	-	-
Nonbinary	1%	-	-
Unknown	9%	-	-
<b>Illinois - Statewide</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	49%	49%	49%
Women	51%	51%	51%
Nonbinary	0%	0%	-
Unknown	-	0%	-

Race	2020	2021	2023
Unknown	2%	0%	0%
<b>Majority-Owned Firms</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
White	100%	26%	31%
Black	0%	25%	27%
Coalition of Minority Races	-	14%	14%
Latinx / Hispanic	0%	5%	5%
Asian	0%	2%	3%
Additional Races / 2+ Races	0%	2%	2%
Unknown	0%	27%	18%

Gender	2020	2021	2023
<b>Majority-Owned Firms</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Men	97%	50%	69%
Women	3%	12%	16%
Nonbinary	0%	0%	0%
Unknown	-	38%	15%

	2020	2021	2023
<b>Employees</b>	<b>4,934</b>	<b>4,480</b>	<b>2,103</b>
Veteran	2%	4%	3%
People with Disabilities	1%	3%	7%
Arrested, Convicted, or Adjudicated Delinquent (self or family) for cannabis offense	1%	6%	7%
Formerly Incarcerated	<1%	-	2%
Live in DIA (now or past)	18%	-	-
LGBTQIA+	1%	13%	16%
Transgender	-	1%	2%
Corporate office / headquarters	-	15%	10%
Cultivation Center	-	22%	28%
Infuser	-	1%	3%
Transporter	-	0%	3%
Laboratory	-	0%	2%
Dispensary	-	44%	50%
Other	-	2%	4%
C-Suite	3%	1%	3%
Senior Managers	4%	7%	3%
Supervisors / Middle Managers	14%	21%	29%
Frontline Employees	79%	50%	65%



	2020	2021	2023
<b>Owners</b>			
Veteran	2%	17%	-
People with Disabilities	1%	1%	-
Arrested, Convicted, or Adjudicated Delinquent (self or family) for cannabis offense	1%	14%	18%
Formerly Incarcerated	0%	-	-
Live in DIA (now or past)	1%	-	33%
<b>Companies</b>			
	<b>32</b>	<b>118</b>	<b>132</b>
With IDOA licenses	17	62	35
With IDFPF licenses	27	30	95
Reported majority owners	78	339	334
Reported minority owners	171	188	211
Reported directors on board	97	327	164
Reported executives	142	315	207
Total employees reported	11,175	-	-
Total Illinois employees reported	4,934	-	-

All responses are reported, including responses from out of state owners, directors, executives, and employees. Numbers may not add to 100% due to rounding.

Statewide demographics are as estimated by the U.S. Census Bureau’s annual community survey (*i.e.*, the yearly *quickfacts* table).

Race and ethnicity are often more complicated than just Black, Latinx / Hispanic, or White. Results here are simplified as much as possible to provide easy comparison across years and to the U.S. Census and other data sources. People who self-identified as multiple races were categorized into Black or Latina or Latino groups to facilitate interpretation and following the U.S. Census’ ethnicity categorization so that Black percentage includes Hispanic (*i.e.*, 61% identified White, non-Hispanic; 15% Black, both Hispanic and non-Hispanic). Latina or Latino numbers in CROO’s survey do not include people identifying as Black Hispanic and thus underreport those numbers.

2020 survey was sent only to license-holding cannabis firms operating in December 2020-March 2021. 32 firms responded. Firms were instructed to and responded for as many principal officers holding equity in their business as possible. No cannabis employees, other than those assisting with the company responses, directly answered survey questions. Employees were not separated by place of employment (*i.e.*, corporate offices, cultivation, or retail). Part-time employees were measured separately in 2020.

2021 survey was sent in December 2021 with responses received until July 2022.

In 2021 and again in 2023, employees self-identified their race and gender, as well as identified their place of employment and described their working conditions. The 2020 employee count (4,934) is what cannabis companies reported as their number of employees in Illinois. The 2021 and 2023 employee counts (4,480 and 2,103) are the number of usable survey responses received from cannabis employees.

Nonbinary questions were intended to count gender identity for those who do not identify as men or women, particularly those who identify as transgender and gender non-conforming (TGNC).

Blank cells in the tables above are either information still being cleaned and analyzed or information not collected in that survey year. For 2021 and 2023, CROO estimates the number of Illinois-related employees is between 7,500 and 12,000 people, with a lower number in 2021 and more people employed in 2023.

## Diversity Survey Authority - 410 ILCS 705/7-30

Sec. 7-30. Reporting. By January 1, 2021, and on January 1 of every year thereafter, or upon request by the Illinois Cannabis Regulation Oversight Officer, each cannabis business establishment licensed under this Act and the Compassionate Use of Medical Cannabis Program Act shall report to the Illinois Cannabis Regulation Oversight Officer, on a form to be provided by the Illinois Cannabis Regulation Oversight Officer, information that will allow it to assess the extent of diversity in the medical and adult use cannabis industry and methods for reducing or eliminating any identified barriers to entry, including access to capital. Failure of a cannabis business establishment to respond to the request of the Cannabis Regulation Oversight Officer to complete the form, report, and any other request for information may be grounds for disciplinary action by the Department of Financial and Professional Regulation or the Department of Agriculture.

The information to be collected shall be designed to identify the following:

- (1) the number and percentage of licenses provided to Social Equity Applicants and to businesses owned by minorities, women, veterans, and people with disabilities;
- (2) the total number and percentage of employees in the cannabis industry who meet the criteria in (3)(i) or (3)(ii) in the definition of Social Equity Applicant or who are minorities, women, veterans, or people with disabilities;
- (3) the total number and percentage of contractor and subcontractors in the cannabis industry that meet the definition of a Social Equity Applicant or who are owned by minorities, women, veterans, or people with disabilities, if known to the cannabis business establishment; and
- (4) recommendations on reducing or eliminating any identified barriers to entry, including access to capital, in the cannabis industry.

(Source: P.A. 101-27, eff. 6-25-19; 102-98, eff. 7-15-21.)