

CBD

Consumer research report
9th October 2019

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1. Executive summary

Background and methodology

- Community Research and 2CV were commissioned by the Food Standards Agency to conduct research with CBD users to understand their behaviours and attitudes in relation to their use of CBD, and their awareness of, and response to, the clarification that CBD is a 'novel food'¹.
- The research consisted of an online survey with 352 CBD users (229 current) followed by a qualitative online bulletin board with ten respondents from the survey; both elements of the research were conducted in September 2019.

Main findings

- Of those who have used CBD, around a third no longer use it. Around a quarter are regular users while the remaining four in ten use it on an occasional basis. Nearly all current users say that they are likely to continue to use it. Over three quarters of those currently using CBD have been doing so for less than a year.
- Tinctures are the most common format for taking CBD, followed by e-liquids, pills/capsules, and creams / ointments. Just under a third buy their CBD from health food stores, and just under a quarter from online CBD specialist retailers or online marketplaces. The key driver for deciding which type of CBD product to buy is the quality of the product, but the cost, trust in the retailer, level of CBD in the product and trust in the brand itself are all considered important factors in decision making for at least a third of respondents.
- Respondents reported that the main reason they use CBD is for pain relief. They also reported that CBD helped relieve anxiety, aided relaxation and sleep, supported mental health and relieved depression.
- Around two thirds of respondents feel CBD has benefitted their overall health and / or helped them with a medical condition. The conditions that people are most likely to say it has helped them with are anxiety / stress relief, arthritis and back pain.
- Over a third of CBD users say that they are reliant on it or that they would be bothered if they could no longer buy it.
- Most respondents are confident that the CBD products they are buying are high quality and contain what they say they do. Although the majority assume that CBD is regulated, a sizeable minority do express concern about the legal status of the CBD they buy. By and large, bulletin board participants are

¹ The European Union's Novel Food regime clarified that most extracted cannabinoids were 'novel' following a meeting in January 2019

confident about the legality and quality of the products they buy. This confidence stems from purchasing from what they see as reputable retailers.

- There appears to be no awareness of CBD's status as a 'novel food'. When learning about this, some bulletin board participants express concern, but others are less perturbed. Similarly, there is a mixed response to the idea of CBD no longer being readily available from mainstream retailers – for some, knowing that it was not legal to sell or market CBD would be enough for them to stop using it, whilst others would simply source it elsewhere.

2. Background and methodology

Background and objectives

With both consumer interest in and market penetration of CBD ('cannabidiol') increasing in the UK, the Food Standards Agency wished to build their understanding of the attitudes and behaviour of CBD users. Following the clarification by the European Union's Novel Food regime that extracted cannabidiols are 'novel foods', the FSA also wished to explore consumer awareness and understanding of CBD's legality, and the impact this may have on purchasing behaviour.

The project objectives were:

- To understand the 'real' reasons why consumers use CBD including how long they have taken it for and how reliant they feel they are on its use
- To understand consumers' understanding of CBDs' legality (or otherwise) and the reaction of consumers if CBD was no longer easily available online or on the high street
- To get a deeper understanding of consumer awareness of CBD and whether/what consumers understand its status as a 'novel food'

Methodology

Community Research / 2CV were commissioned to conduct research with CBD users to meet these objectives. This research consisted of an online survey and a follow up online 'bulletin board' discussion.

Online survey

A ten-minute online survey was conducted with 352 current or previous users of CBD, with demographics allowed to fall out naturally. The survey fieldwork was conducted between the 3rd and 10th September 2019. The majority of the research findings focuses on those who currently use CBD (229 respondents). The sample was obtained from Dynata's online consumer panel in England, Wales and Northern Ireland².

Please note that in order to find sufficient numbers of CBD users, Dynata specifically targeted known food supplement users, as opposed to a nationally representative sample. Whilst these findings provide an indication of the attitudes and behaviours of CBD users, it is therefore not possible to draw conclusions about the profile of CBD users or extrapolate this data to the wider population in England, Wales or

² The Food Standards Authority only has responsibility for England, Wales and Northern Ireland. Food Standards Scotland is responsible for Scotland.

Northern Ireland. A demographic breakdown of the sample can be found in the Appendix of this report.

Bulletin Board

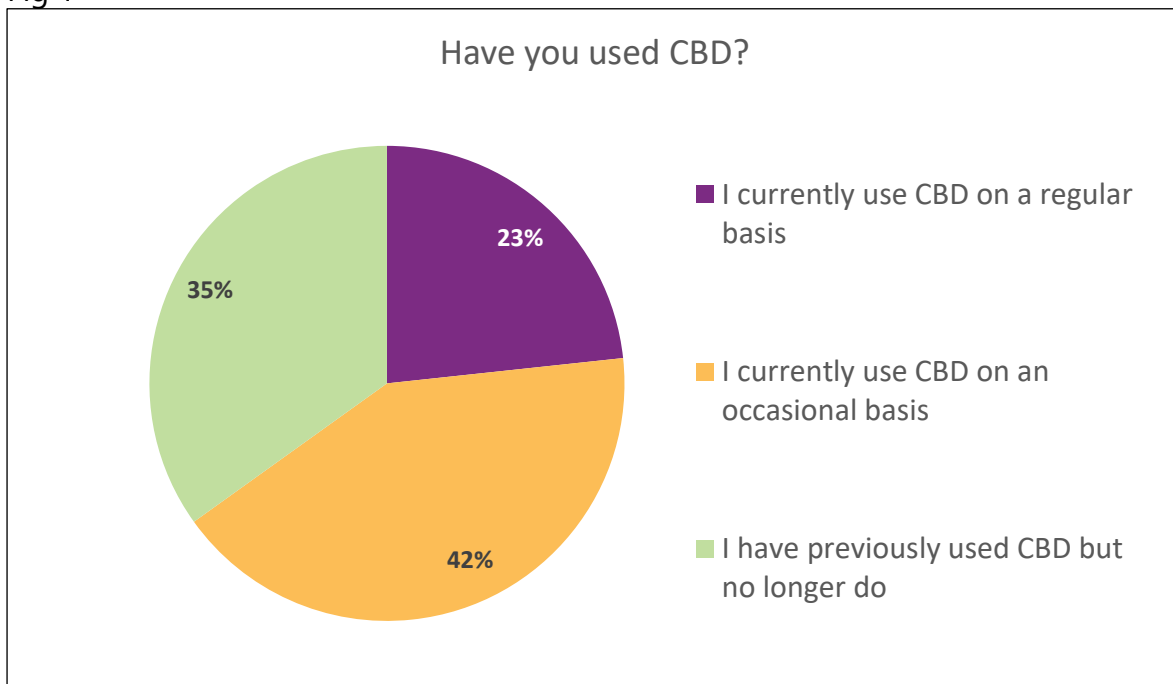
Ten respondents from the online survey were recruited to take part in a follow up 'bulletin board', an online qualitative research forum in which participants were asked a series of open ended questions over a three day period (16th to 18th September 2019), and were able to see and respond to one another's responses. Participants were selected to ensure that feedback came from a range of different types of users (in terms of age, gender, region etc.)

3. Main findings

Frequency of usage

As shown in Figure 1, amongst those who have ever used CBD, just under a quarter (23%) say they use it regularly, compared to 42% who say they use it occasionally. Around a third (35%) say they no longer use it. Reasons given for no longer using can be found on P.22 of this report.

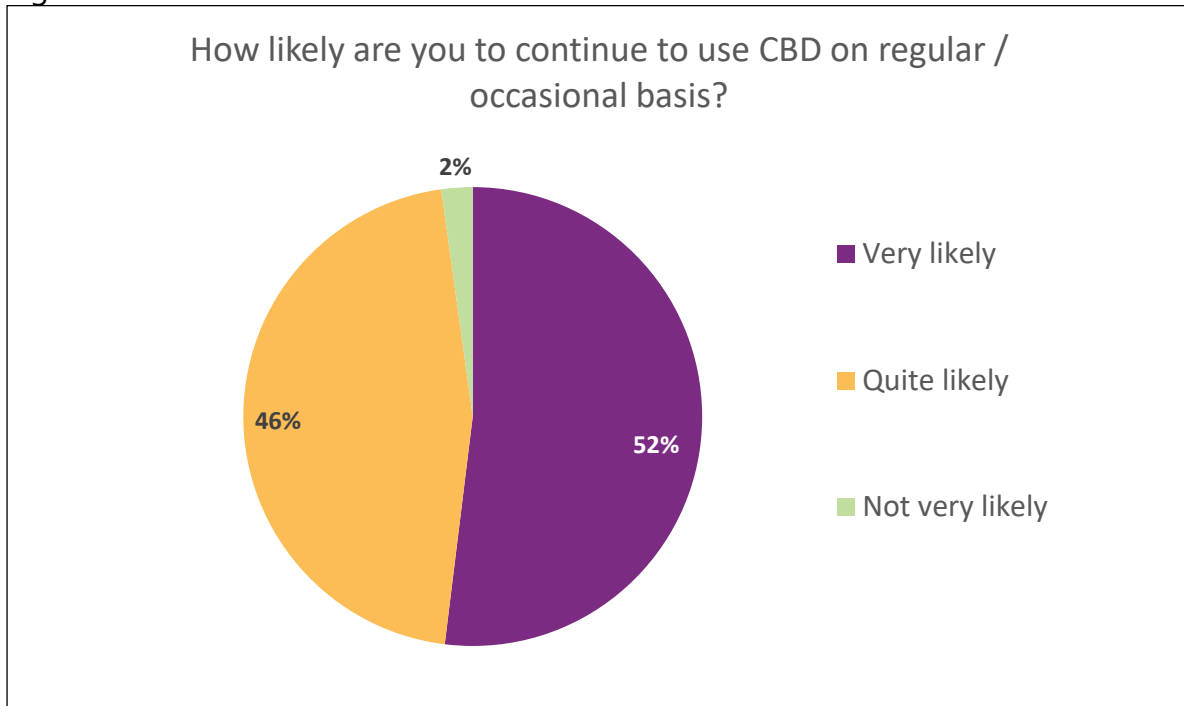
Fig 1



Base: All respondents (352)

The vast majority of those currently taking CBD expect to continue to do so: 52% think they are very likely to, and 46% say they are quite likely to; only 2% say they are not very likely to continue (see Fig 2).

Fig 2



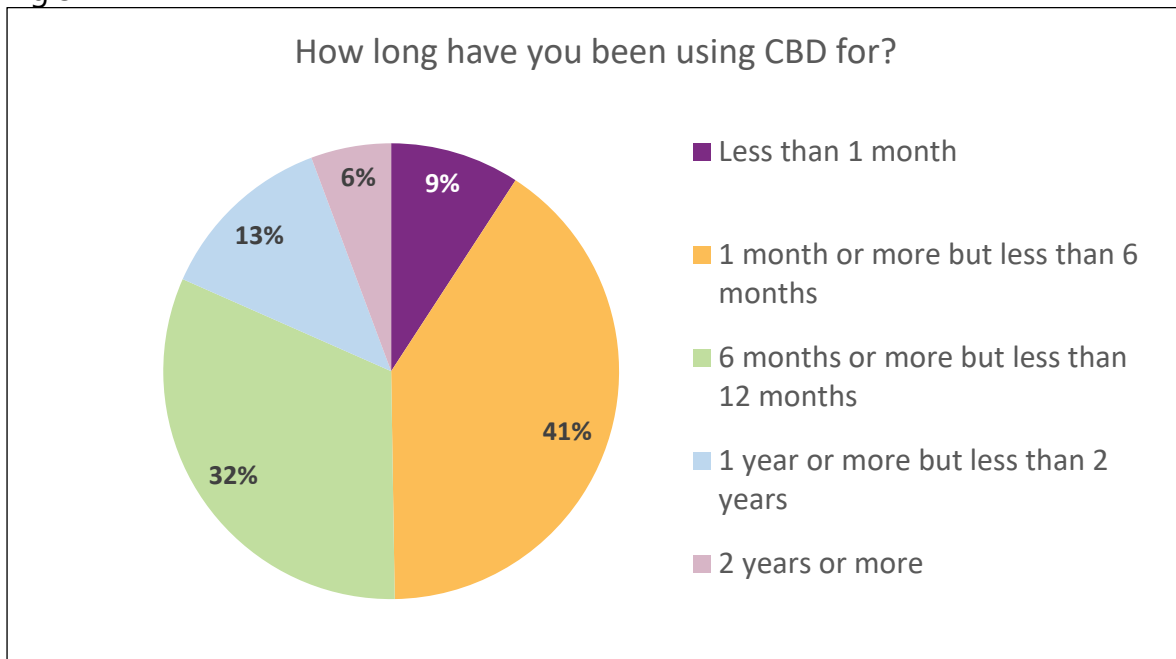
Base: All current / occasional users (229)

How is CBD being used?

Length of use

As Fig 3 shows, most of those who are using CBD have been doing so for less than a year – 32% have been doing so for between six and twelve months, and 41% for between one and six months. Only a fifth have been using it for longer than a year (13% for between one and two years, and 6% for two years or more). One in ten have only recently started using CBD within the last month.

Fig 3



Base: All current / occasional users (229)

The relative recency of use was also reflected amongst respondents to the Bulletin Board.

'I have only been taking it for about a month, so probably too early to see any benefits.' (Bulletin Board respondent, male, 65+)

'I've been taking it now for a period of a few months after conventional treatments failed to work for me.' (Bulletin Board respondent, female, 45-54)

'I've only been taking it for the past few months but I find it quite effective.' (Bulletin Board respondent, female, 18-24)

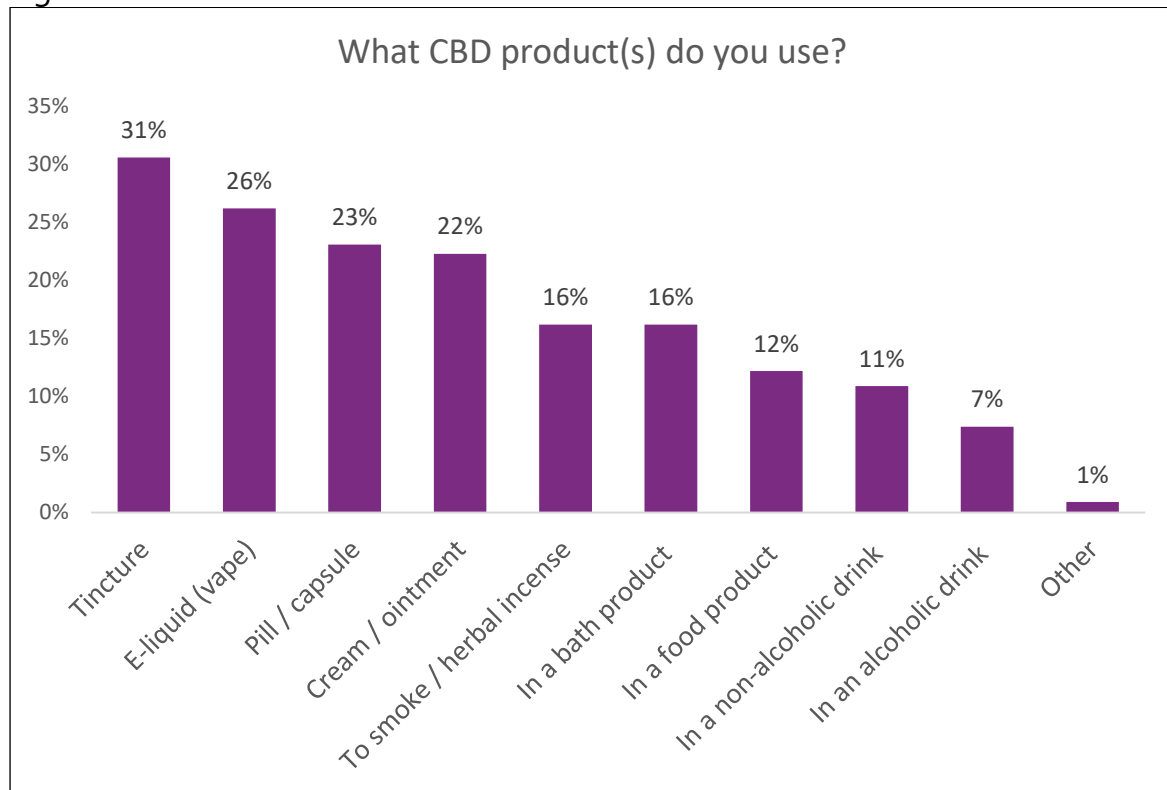
Format

Fig 4 shows that CBD users are most likely to use the product in the form of a tincture (an oral spray or dropper), with just under a third (31%) using these. Around a quarter (26%) vape CBD in e-liquid form, and 23% take it in pill or capsule form, and 22% via a cream or ointment. These figures are broadly in line with the Centre for Medicinal Cannabis' market research report, which showed that 70% of UK consumers are purchasing tinctures / oils or capsules³. About one in ten CBD users take it via a food or drink product – 12% in a food product, 11% in a non-alcoholic

³ CBD in the UK, June 2019 <https://irp-cdn.multiscreensite.com/51b75a3b/files/uploaded/Exec%20Summary%20-%20CBD%20.pdf>

drink, and 7% in an alcoholic drink. [The FSA is responsible for those formats considered food: tinctures, pills / capsules, and food and drink products.]

Fig 4



Base: All current / occasional users (229)

'I vape CBD but I would like to try tablets soon as I am going to quit smoking.' (Bulletin Board respondent, 35-44)

'I use this in the form of a facial moisturiser' (Bulletin Board respondent, female, 45-54)

'I just take it in drop form.' (Bulletin Board respondent, female, 35-44)

A couple of Bulletin Board participants mentioned that they did not always find it clear what amount of CBD to use.

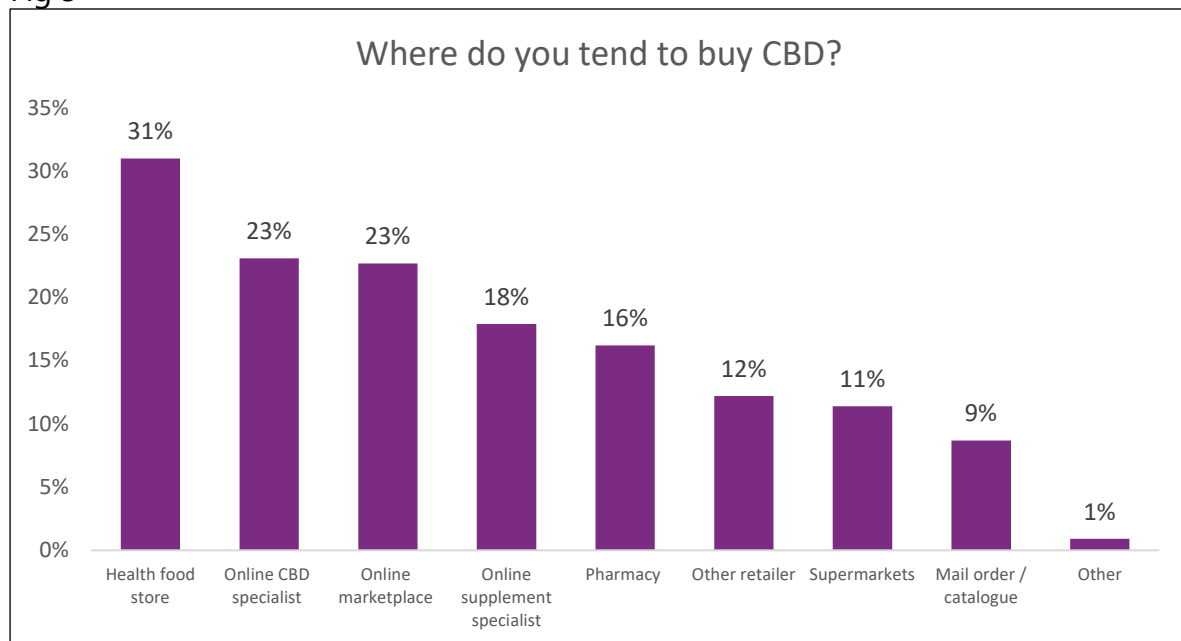
'Thus far I have only ever bought it online in a little dropper bottle. I get confused by the different strengths and types available.' (Bulletin Board respondent, female, 35-44)

'I held off buying because it seemed confusing – take one strength for one thing, another for something else. The oil I'm using is a single type and it comes in various strengths so you can build up – far less confusing.' (Bulletin Board respondent, male, 25-44)

Choice of retailer

CBD users are most likely to purchase CBD from health food stores, with 31% saying this was where they tended to buy it (see Fig 5). After this, online retailers were most common, with 23% buying it from both specialist CBD retailers and mainstream online marketplaces, and 18% buying it from specialist supplement retailers. Overall, the proportion of people buying from High Street stores (health food stores, supermarkets, pharmacies or other retailers) was 61%, slightly higher than those buying from any online retailers (54%). By contrast the Centre for Medicinal Cannabis’ report⁴ found that the majority of UK consumers of CBD products are buying them online and not in High Street stores.

Fig 5



Base: All current / occasional users (229)

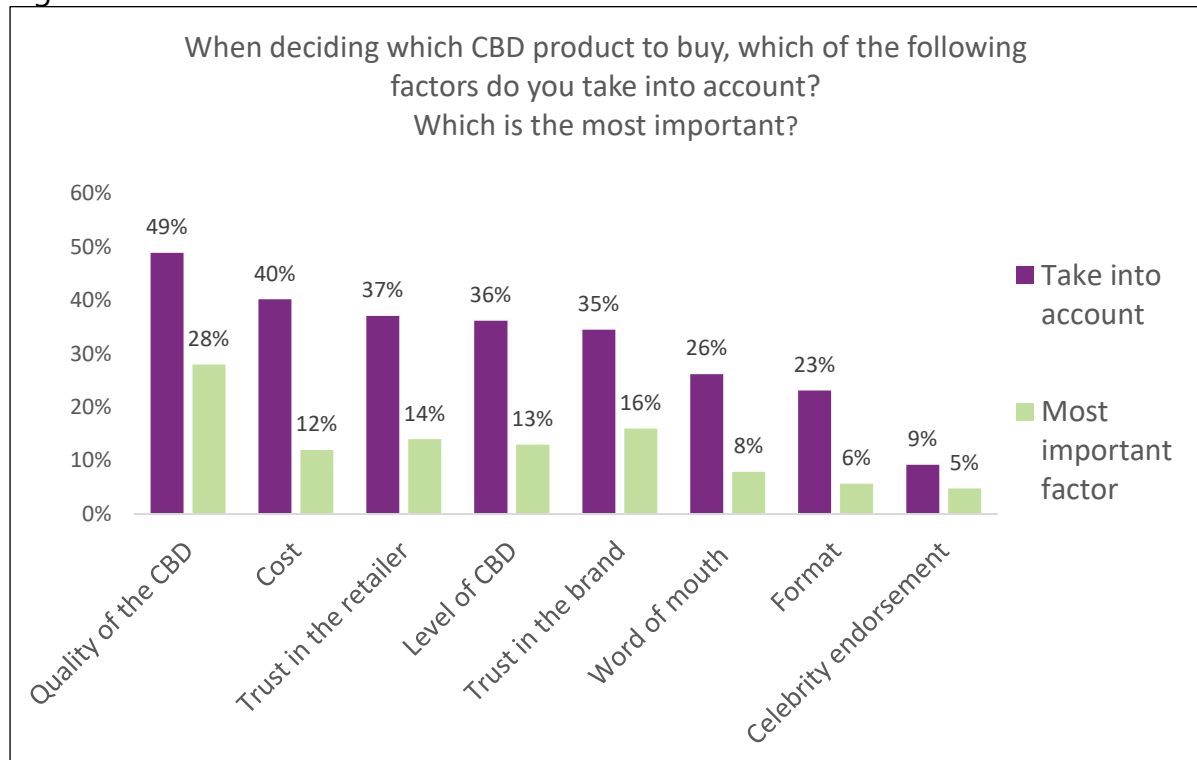
Reason for choice of retailer

As Fig 6 shows, around half of users (49%) say they choose which CBD product to buy on the basis of the quality of the CBD. Cost (40%), trust in the retailer (37%), the level of CBD in the product (36%), and trust in the product brand (35%) are all also given as a reason by a third or more of CBD users. Around a quarter make their decision based on word of mouth (26%) or the format of the product (23%). A smaller proportion, just under one in ten (9%), say they take into account celebrity endorsement in their decision making.

⁴ Ibid.

When asked which factor is most important, the quality of the product is cited by the highest proportion of users (picked by 28% as the most important), but trust in the brand is chosen as the most important factor by a higher proportion (16%), than is true for cost (12%). Men are more likely than women to say that the level of CBD in the product and cost are the most important factors; by contrast, women are more likely to say recommendations from others is the most important thing.

Fig 6



Base: All current / occasional users (229)

'I was recommended by a friend and researched online. When I purchased from [High Street Retailer], the lady behind the counter was really helpful.' (Bulletin Board respondent, female, 35-44)

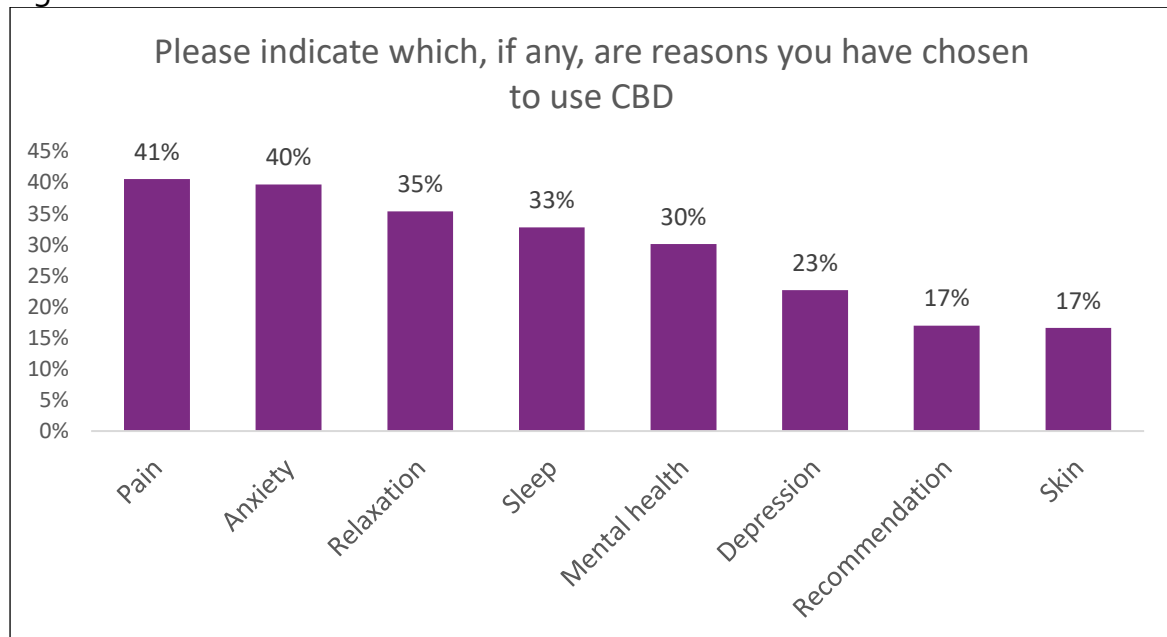
'I have asked my Bowen therapist for recommendations as well as looking and buying from [online retailers]. I still have yet to find a trusted, constant source, but an option is my local health store which my therapist recommended the CBD that they stock. I find it easier to order online as getting about is challenging for me, but my goal is to get to the health store and try the CBD oil from there.' (Bulletin Board respondent, female, 35-44)

Why do people take CBD?

Reasons for use

When asked, unprompted, why they take CBD the most common reason given by both current and previous users, is for pain relief. This is also the most common reason chosen by current users from a prompted list (see Fig 7), with 40% saying they take CBD to relieve their pain. Anxiety / stress relief is the second most common reason given, both spontaneously and from the prompted list. The other common reasons, given by around a third of respondents are: because CBD helps them to relax (35%); to help with sleep (33%); or to support their mental health (30%). Not shown in Fig 7, but mentioned by just under one in ten are liking the taste of CBD (9%), to help reduce high blood pressure (9%), and to improve memory / concentration (9%).

Fig 7



Base: All current / occasional users (229)

'I read that it is good for anxiety and I have general and social anxiety so wanted something natural that might calm me down in situations.' (Survey respondent, female, 25-34)

'I was diagnosed with Fibromyalgia and the pain is unbearable, I can't relax and am on edge all the time. I get anxious and restless so I started vaping CBD oil. I find it helps my anxiety when I vape and allows me to relax my muscles. It doesn't touch the pain unfortunately and I wish they would prescribe cannabis for those that suffer chronic pain.' (Survey respondent, female, 18-24)

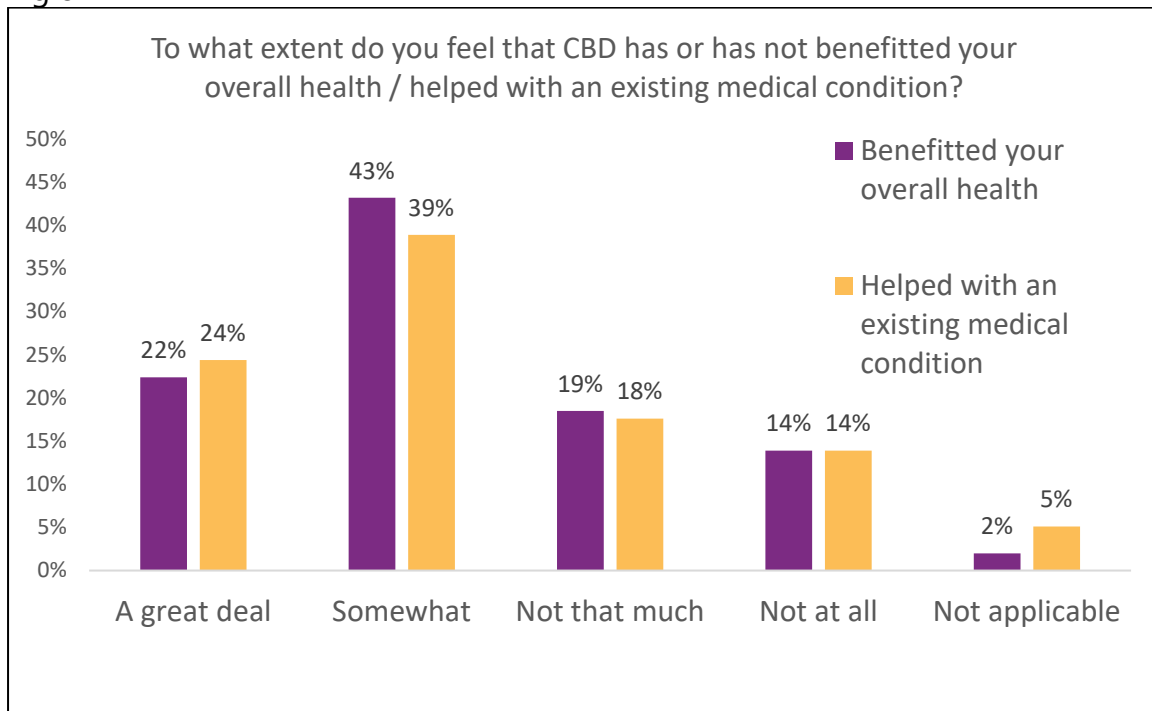
'I decided to try this product as I had read about its potential benefits for the skin. It has *anti-inflammatory* properties so thought it would be worth a try to reduce problem areas, especially on the face.' (Bulletin Board respondent, female, 45-54)

'I suffer from rheumatoid arthritis and although on medication for a number of years, I still have some joint pain which flares up from time to time.' (Bulletin Board respondent, male, 65+)

Health conditions CBD is used for

Around two thirds of respondents feel that CBD has benefitted their overall health and / or helped them with an existing medical condition, as shown in Fig 8.

Fig 8



Base: All current / occasional users (229)

The conditions that people are most likely to say CBD has helped with are anxiety / stress (mentioned by around 1 in 4), arthritis or osteoarthritis, and back pain (each mentioned by around 1 in 8).

'I suffer from chronic arthritis pain and do not wish to continue to take strong painkillers because of the addiction likelihood. I was recommended CBD and tried it and found it offers me some relief.' (Survey respondent, male, 65+)

'I started taking it for debilitating anxiety... It does help me to focus and calm down and aids sleep.' (Bulletin Board respondent, female, 35-44)

'It helps keep cramping at bay.' (Bulletin Board respondent, female, 45-54)

Sources of information

Participants on the Bulletin Board were asked what trusted sources of information about CBD they use. There was a reliance on personal and / or online recommendations, for example from friends or family members, or in social media forums. Several had also done online research, although not everyone trusted what they read.

'I have found out a lot of information from relatives in the US who swear by CBD and have also joined some groups on Facebook that are specifically for users of CBD and they seem fairly knowledgeable. They will recommend the best oil / drops from personal experience.' (Bulletin Board respondent, female, 45-54)

'I found out my information from Facebook groups... I first heard of it on a Facebook group for ME/CFS. It was raved about and highly recommended.' (Bulletin Board respondent, female, 18-24)

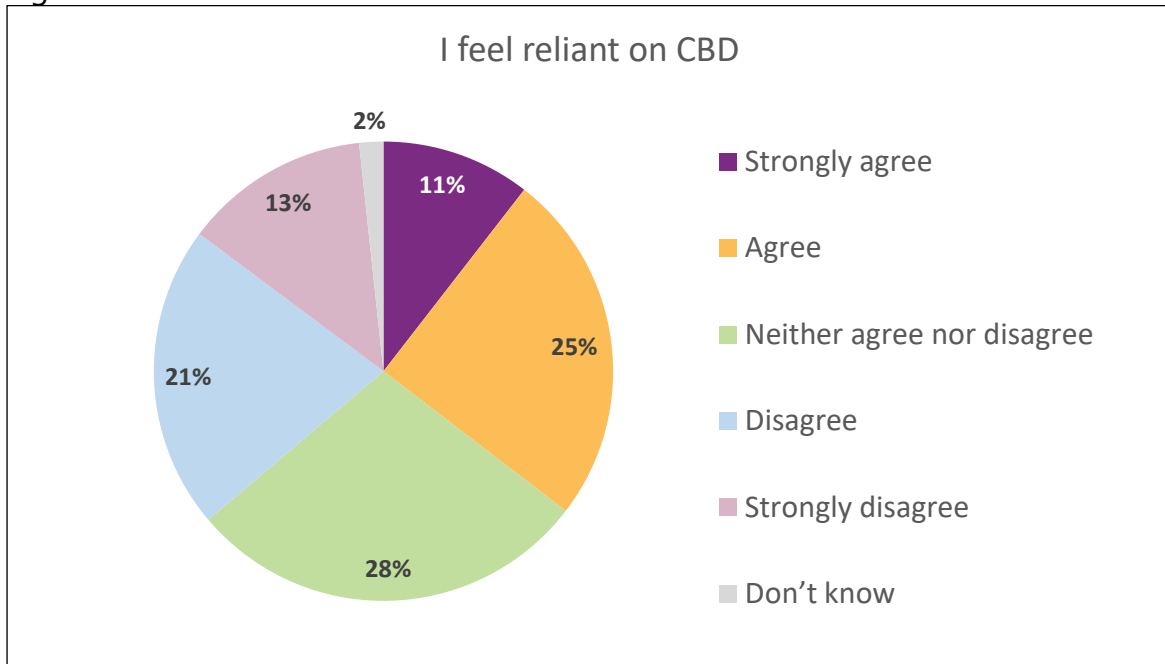
'I found out about CBD from a YouTube video and found it interesting and thought I would give it a try.' (Bulletin Board respondent, 35-44)

'I was recommended it by a family member who has researched the benefits of CBD at university. I have also roughly searched the web for additional information.' (Bulletin Board respondent, female, 18-24)

Reliance on CBD

Fig 9 shows that over a third of CBD users (36%) agree (25%) or agree strongly (11%) that they feel reliant on CBD.

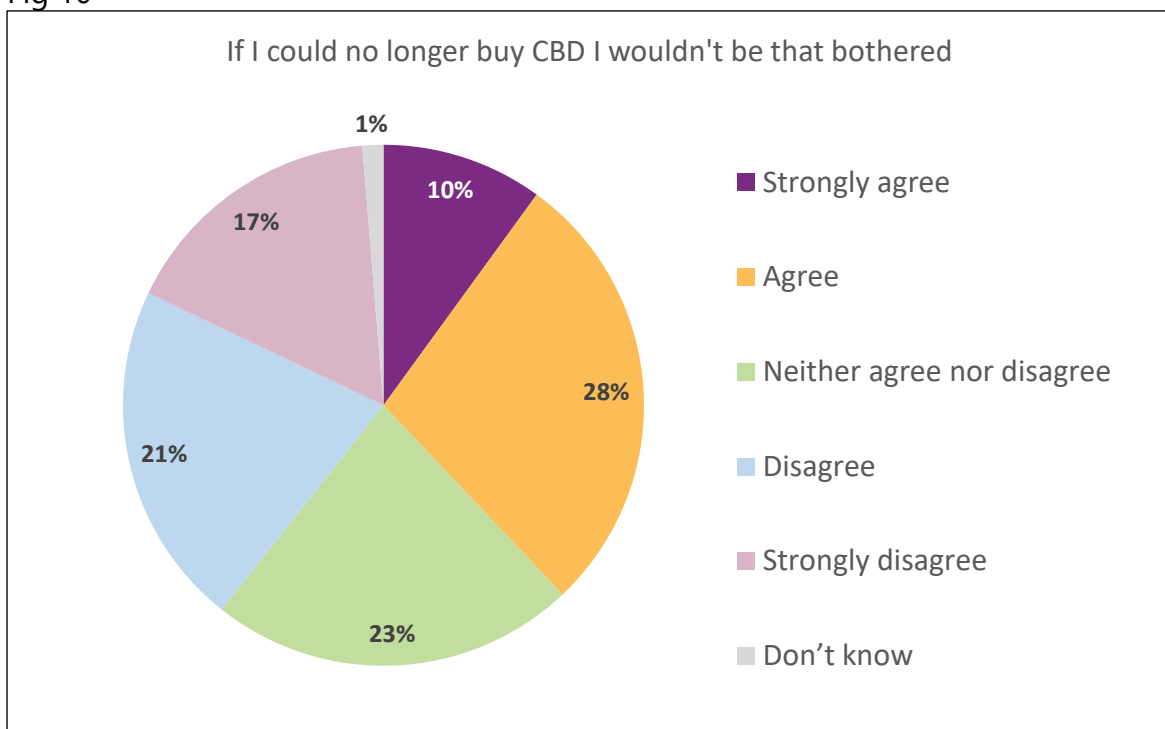
Fig 9



Base: All current / occasional users (229)

This broadly matches the finding that 38% of respondents disagreed (21%) or disagreed strongly (17%) with the statement 'if I could no longer buy CBD I wouldn't be that bothered' (as shown in Fig 10).

Fig 10

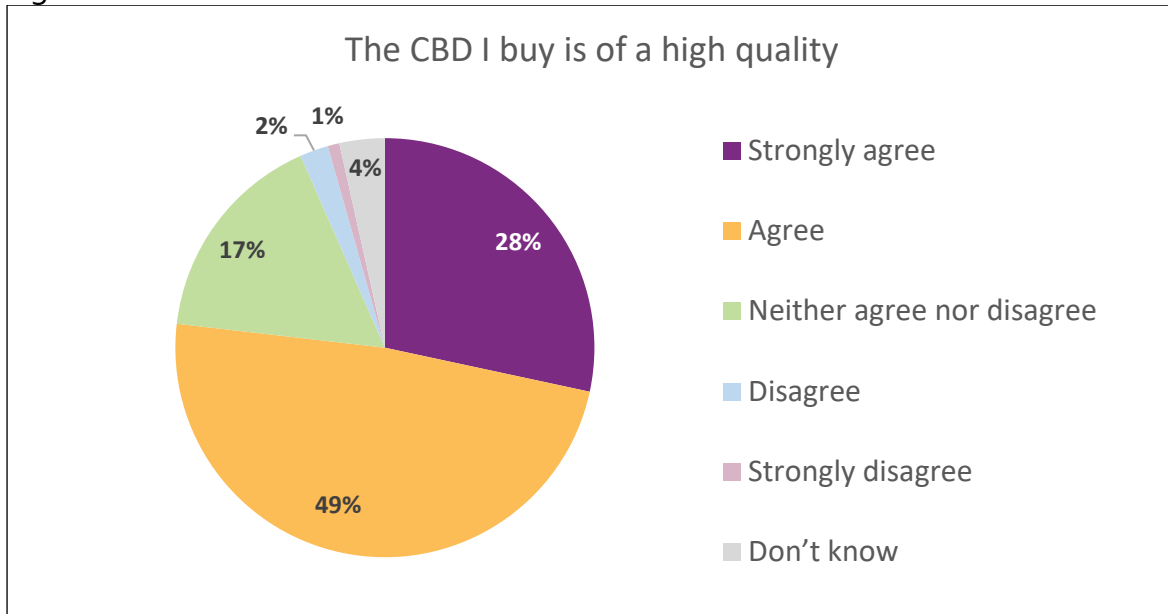


Base: All current / occasional users (229)

How confident are users in the quality of the CBD they use?

The vast majority of CBD users agree that they are confident in the CBD products they are using. As Fig 11 shows, over three quarters (77%) agree with the statement ‘the CBD I buy is of high quality’ (28% agree strongly).

Fig 11

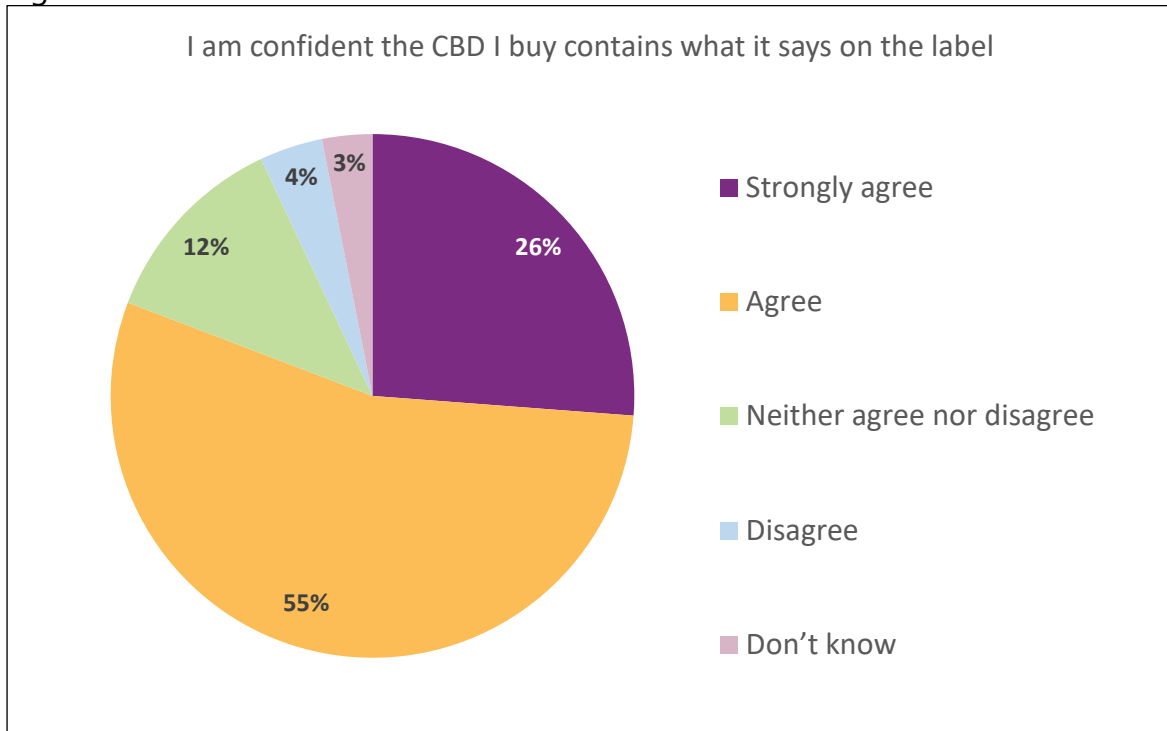


Base: All current / occasional users (229)

Furthermore, eight in ten agree (55%) or agree strongly (26%) with the statement ‘I am confident that the CBD I buy contains what it says on the label’ (see Fig 12). However, research by TTS Pharma ⁵ shows that CBD content labelling is often inaccurate.

⁵ “Research: Commercial cannabidiol on the UK market is illegal”, Manufacturingchemist.com, 19 September 2019
https://www.manufacturingchemist.com/news/article_page/Research_Commercial_cannabidiol_on_the_UK_market_is_illegal/158280

Fig 12

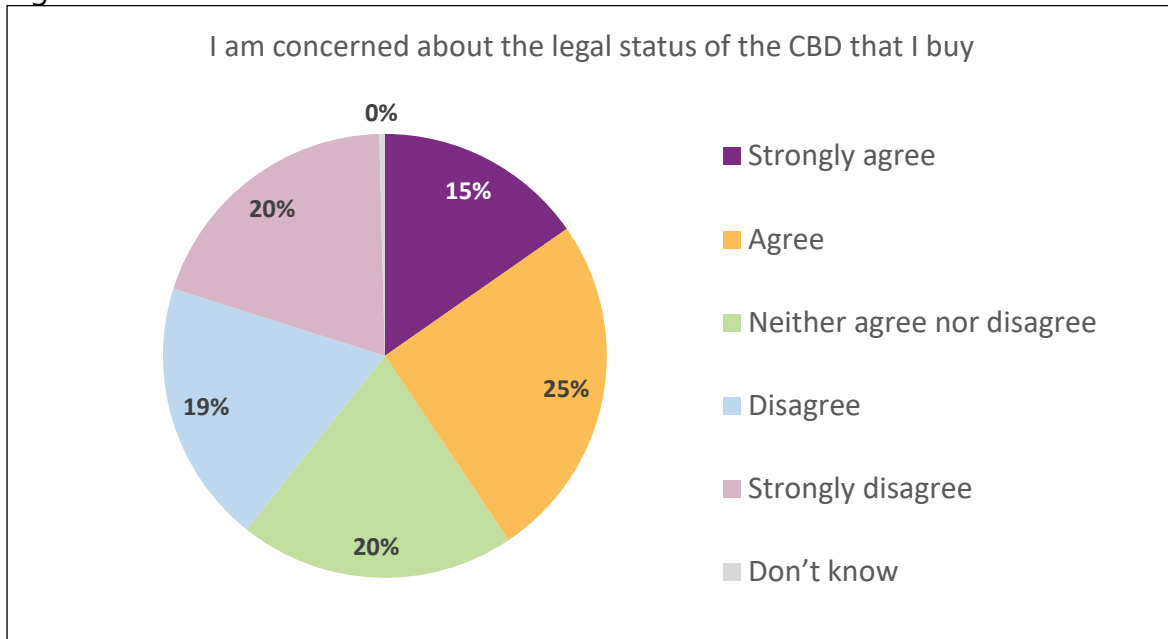


Base: All current / occasional users (229)

How confident are users in the legality CBD they use?

There is a degree of doubt over the legality of CBD, as demonstrated in Fig 13. 40% agree with the statement 'I am concerned about the legal status of the CBD that I buy' (15% agree strongly) – and a further 20% say they neither agree nor disagree, suggesting at least some level of uncertainty. However, 39% disagree (20% strongly) with this same statement. Men are more likely than women to strongly agree that they are concerned about the legal status of the CBD they buy (22% strongly agreeing, compared to just 10% of women).

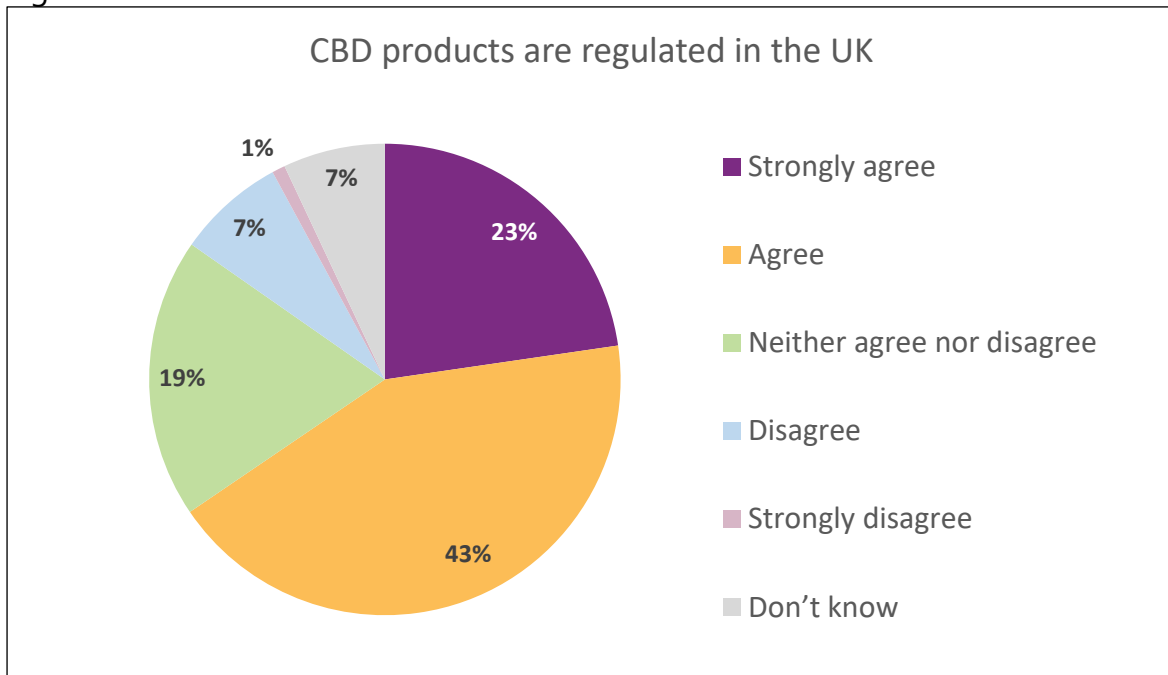
Fig 13



Base: All current / occasional users (229)

Two thirds of CBD users (66%) agree or agree strongly with the statement that 'CBD products are regulated in the UK' whilst only 8% disagree or disagree strongly with this statement (see Fig 14).

Fig 14



Base: All current / occasional users (229)

Bulletin Board participants were also fairly confident that the CBD they used was legal to buy and safe to take, most usually this was because they felt they were purchasing it from trusted retailers. Indeed for some, the fact that the product can be purchased on high streets and from well-known brands simply means that it must be a legal product. Some had also done some research around CBD and felt that they had enough knowledge to be confident in the product's safety, as well as its legality.

'I buy it from my local health food store which is an established commercial company so it must be legal.' (Bulletin Board respondent, female, 18-24)

'It comes from my local pharmacy so I thought if it wasn't legal that they wouldn't be stocking it. Also the pharmacist said it's perfectly safe for what I use it for.' (Bulletin Board respondent, female, 45-54)

'I am very confident. I found the company through Facebook, but they are part of all the trade bodies and attend UK trade shows about CBD. Also the product contains little to no THC which is the illegal bit.' (Bulletin Board respondent, male, 25-34)

'Having read about this product, the CBD that is contained within it is the non-hallucinogenic part of the hemp leaf, which is legal to sell here in the UK under licence. I buy from [High Street Retailer] who I assume (!) will be selling it legally! As to its safety, as it is sold in [High Street Retailer], I assume that it has passed some sort of safety test.' (Bulletin Board respondent, female, 45-54)

Only one participant voiced concern about the legality / safety of the product they were buying.

'I'm not very confident at the moment as I have bought from a few online suppliers on [online retailer]. I am wanting to find a safe and reliable supplier.' (Bulletin Board respondent, female, 35-44)

Response to further information about CBD

Bulletin board participants were provided with information about CBD, explaining its status as a novel food and the fact that because it has not had the required food safety assessment, it is not legal for it to be sold / marketed.

There was a mixed response to this information. Most were surprised to learn this, and a few participants expressed a degree of concern, mainly about possible safety implications.

'I was not aware of this and so this does concern me as I would worry about the long term effects of use.' (Bulletin Board respondent, female, 35-44)

'This does concern me somewhat if it has not been tested in any way.' (Bulletin Board respondent, female, 45-54)

As a result, there was some appetite for more monitoring of CBD.

'I believe that if it was deemed to be dangerous, then there would be calls for it to be withdrawn or prescription only... I do not feel in any danger using the product I do, but it would be good to have it confirmed as safe to use in the long term.' (Bulletin Board respondent, male, 65+)

'I think it should be monitored for safety if its classed as a food supplement, and proof of this would make customers more assured of its safety.' (Bulletin Board respondent, female, 45-54)

However, others were not particularly disconcerted by this information.

'I'm not too worried about this as I have been using it every day for two years and I have had no adverse effects. It has only ever done me good, and until I see or read very much the opposite (with good hard evidence) I shall continue.' (Bulletin Board respondent, female, 18-24)

'I have no concern as I have trust and faith that it will continue to be sold. Also the fact that it isn't illegal for us to purchase it is comforting.' (Bulletin Board respondent, female, 18-24)

When asked what impact any restriction on the sale and marketing of CBD might have on them, the responses were again mixed. Some felt that they would have no choice but to stop taking CBD.

'I think it would stop me buying it. I would be worried about getting it from unknown sources as you never know what is in it. At least in a high street shop, you feel a bit more safe and secure about what you are taking.' (Bulletin Board respondent, female, 35-44)

'It would affect me as I would only buy it from a source that looked legitimate. I would not buy a product that appeared to be shady or under the counter, and I would be reluctant to buy online due to both the legality and being unsure about the contents / quality. I would have to stop using the product until approved.' (Bulletin Board respondent, male, 65+)

'If this product was not readily available via high street stores or through major online retailers, I would not purchase it. The only reason I tried this produce is because it was available in [High Street Retailer]... I would be wary of buying this elsewhere as I would be concerned about the source of it and also whether it had been tested or not.' (Bulletin Board respondent, female, 45-54)

One person thought that they would wait to see what impact not taking it had on them.

'I would probably stop taking CBD and see how that affected my health. If I had a bad relapse or significant increase in symptoms, I would have to think hard about finding a supplier.' (Bulletin Board respondent, male, 25-34)

Others thought that they would simply source it elsewhere. When questioned where else they might look, a couple felt that suppliers in the US might be their best bet.

'I would try to get it from another source where it is readily available, even though the cost would be much more expensive... I would trust a good retailer from America if they had good reviews and contact details from communication with them.' (Bulletin Board respondent, female, 45-54)

'If I couldn't buy it in the shops, there are people I know who sell it so I would probably buy it from them.' (Bulletin Board respondent, female, 45-54)

'I would probably try to source it online, researching as much as I could and looking at reviews.' (Bulletin Board respondent, female, 35-44)

Previous users

Survey respondents who said they had previously taken CBD but no longer did so were asked why this was the case. The most common reason, given by four in ten respondents was that they did not feel that it helped them. A further fifth said that they no longer needed it or the pain had gone away. The price of CBD and side effects were the other reasons given by one in ten or more.

'Didn't seem to help. Also it seemed to make me depressed.' (Survey respondent, female, 65+)

'There was no appreciable difference in pain levels after a short period and it was too expensive to continue a prolonged trial.' (Survey respondent, female, 65+)

'Pain no longer there and felt no need to continue to use it. Guess I was afraid of becoming over-reliant/addicted to it.' (Survey respondent, female, 25-34)

'I couldn't afford a high enough dose that would give therapeutic effect.' (Survey respondent, female, 35-44)

Potential users

Respondents who said that they had never used CBD but would consider doing so in future were asked why they would consider doing so. Mirroring the reasons that

most current users chose to do so, the main reasons given were for pain relief (often specifically for arthritis or joint pain), to aid with anxiety or stress, or simply because they had heard that it had health benefits more generally.

'For its possible benefits for my illnesses, it's not illegal, no real negative side effects, but the results have been great in some of the stories I have read.'
(Survey respondent, female, 35-44)

'I have a chronic pain condition which leaves me in a bad state a lot of the time and I've heard that it can be good for this.' (Survey respondent, female, 25-34)

'I will consider it if it will help my panic attacks, anxiety and help me sleep.'
(Survey respondent, female, 65+)

Some were 'keeping it up their sleeves' as a potential source of pain relief further down the road.

'I have a chronic back problem that does react fairly well to traditional pain-killers, but I don't want to be taking these forever, so would consider other treatments that could have less long-term side-effects.' (Survey respondent, male, 45-54)

The fact that it was seen as more natural than conventional medicines was also a draw for some.

'I suffer with fibromyalgia and mental health and feel taking CBD is a more natural way to help so would consider.' (Survey respondent, female, 25-34)

Some said that they were curious about trying it, but were waiting for more evidence of its efficacy.

'I would consider using CBD but only after there has been more research into the genuine positive effects on ill health.' (Survey respondent, female, 65+)

'I am open minded about alternative treatments, but I think further investigation is needed regarding the benefits of CBD.' (Survey respondent, female, 65+)

4. Conclusions

- CBD seems to be a relatively new phenomenon, reflected by recency of use for most current users.
- The main reasons that consumers are taking CBD are for pain relief and to support with mental health conditions.
- Most consumers expect to continue to take CBD, but only a third consider themselves reliant on it.
- Although it is not legal, the fact that it is freely available from large high street and online retailers appears to legitimise it in the eyes of consumers.
- There may be some concerns around strength and dosage of use, and potential appetite for additional guidance.

5. Appendix

Sample profile

The table below shows the demographic breakdown of the sample of CBD users (previous and current) that completed the online survey. As this was a targeted (rather than nationally representative sample), it cannot be assumed that these demographics match the wider profile of CBD users. Please note that figures may not add to 100% due to rounding.

Fig 15

	Current users	Previous users
Gender		
Male	45%	33%
Female	55%	67%
Age		
18-24	9%	7%
25-34	30%	27%
35-44	26%	14%
45-54	18%	15%
55-64	3%	2%
65+	15%	36%
Region		
North East	4%	2%
North West	16%	19%
Yorkshire & Humberside	10%	11%
East Midlands	12%	15%
West Midlands	10%	9%
London	15%	14%
South East	18%	14%
South West	8%	7%
Wales	6%	8%
Northern Ireland	2%	3%
Socio-economic group		
ABC1	56%	55%
C2DE	44%	45%
Ethnic group		
White British	83%	87%
White Other	3%	3%
Black / African / Caribbean / Black British	4%	2%
Asian / British Asian	8%	7%

Mixed / Multiple ethnic group	1%	1%
Other ethnic group	1%	0%