

cbd

2019 Consumer Trends

Introduction

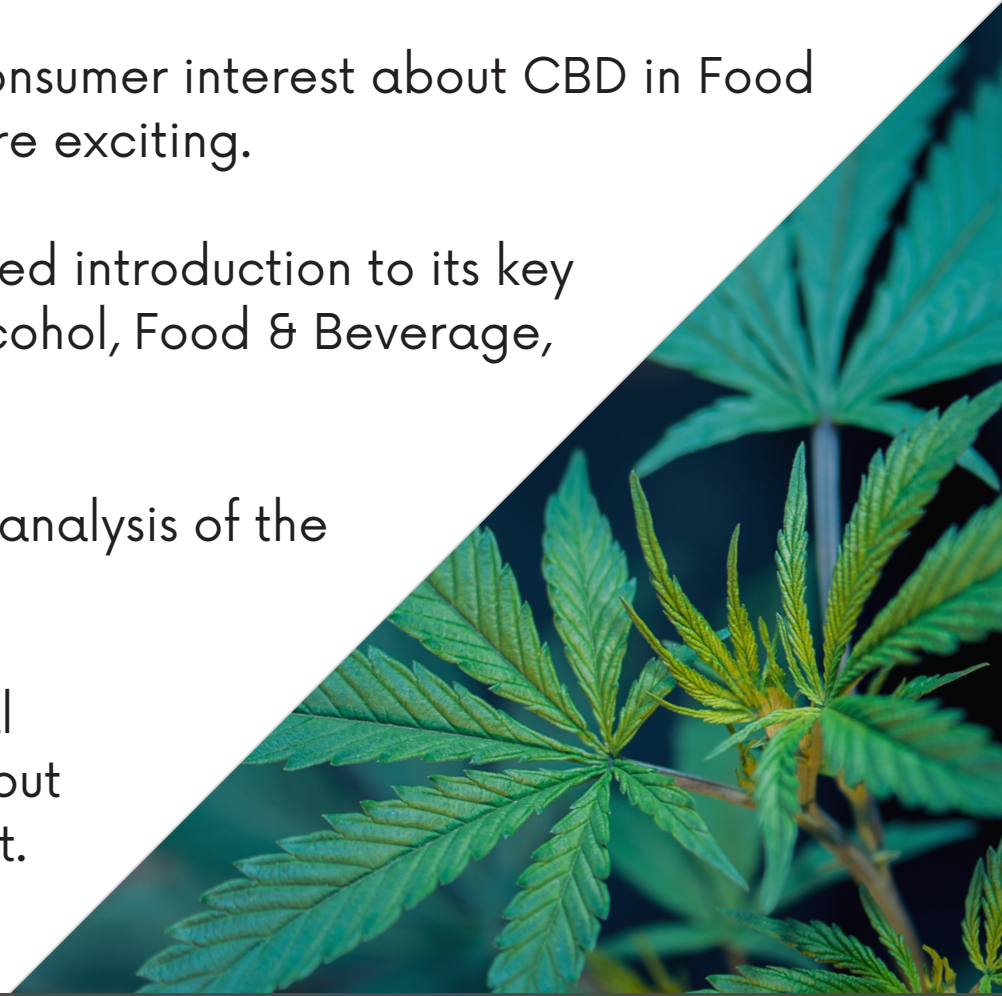
Nielsen predicts that by 2025, CBD will be a \$6 billion industry in the US alone. That's a massive opportunity, but it doesn't impact every market equally.

For example, our data reveals a respectable 146% YoY rise in consumer interest about CBD in Food & Beverage. That's great, but 279% growth in Beauty is even more exciting.

In this report, explore the opportunities CBD offers with a detailed introduction to its key characteristics and how it's growing in the Beauty, Beverage Alcohol, Food & Beverage, and Personal Care markets.

Get a glimpse of how consumers talk and think about CBD with analysis of the core traits they associate with it.

Identify whether CBD is a trend—or just trending. Our contextual data can help you tell the difference, giving you confidence about whether, when, or how to invest in this up-and-coming ingredient.



How it works

Social Standards is a comparative analytics platform that structures organic consumer conversations into market verticals. Our comprehensive insights allow you to measure performance against market benchmarks, confirm your instincts, and get ahead of industry trends.

Where did we get all this data?

We used the Social Standards Consumer Analytics tool to:



CBD 101

Before we analyze how consumers are talking about CBD, let's start with a primer on what cannabis, CBD & THC are and how they're used.



CBD vs. THC

Cannabis is a flowering plant. Along with hemp, it produces CBD & THC. But what are those, exactly?

CBD (Cannabidiol)

What is it?

A nonpsychoactive compound that doesn't produce a "high." It's often used to treat pain, anxiety, epilepsy & seizure disorders.

Is it legal?

Kind of. At the federal level, CBD is legal if it contains no more than 0.3% THC. State-level regulation varies, however, and can cause trouble for manufacturers transporting CBD products across state lines.

THC (Tetrahydrocannabinol)

What is it?

A psychoactive compound responsible for marijuana's high. It's used medically to treat nausea, appetite loss, insomnia, etc.

Is it legal?

It depends. Some states (e.g., Florida, Ohio, Montana, Connecticut, New Mexico) have legalized "medical marijuana," while others (e.g., Colorado, Illinois & California) allow recreational use for individuals 21 and over.

Disclaimers: 1) The FDA is a stickler about functional claims, so brands will need to tread lightly when suggesting uses for CBD and THC. 2) We're not lawyers, so check with your counsel if you want advice on cannabis's legality in your state. 3) The situation is ever-evolving. As of this writing, Congress is pushing for CBD regulation, FDA hearings about CBD are ongoing, and states are pondering various levels of legalization, leaving the fate of cannabis up in the air.



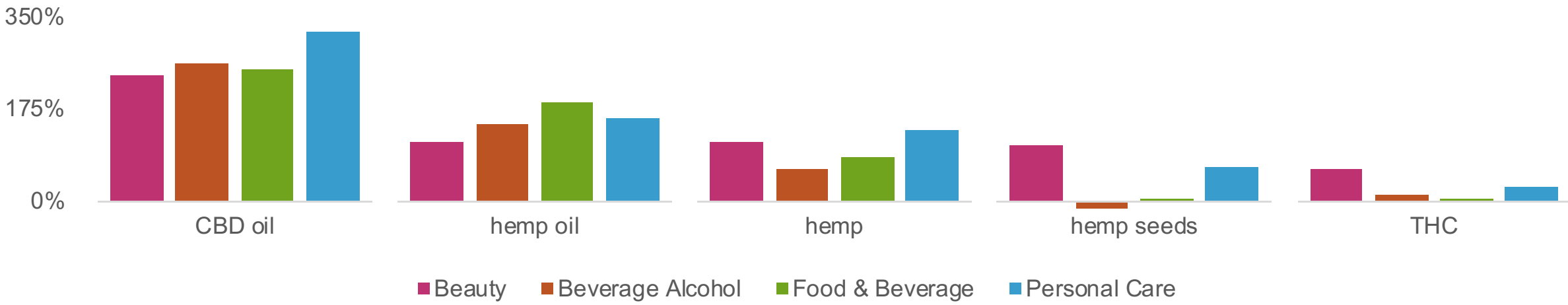
CBD ACROSS MARKETS

Now let's analyze consumer interest in cannabis products—focusing on CBD in particular—across Beauty, Beverage Alcohol, Food & Beverage, and Personal Care.



Consumer interest in cannabis products

Are consumers interested in both CBD and THC? Yes, but CBD is the clear winner here.

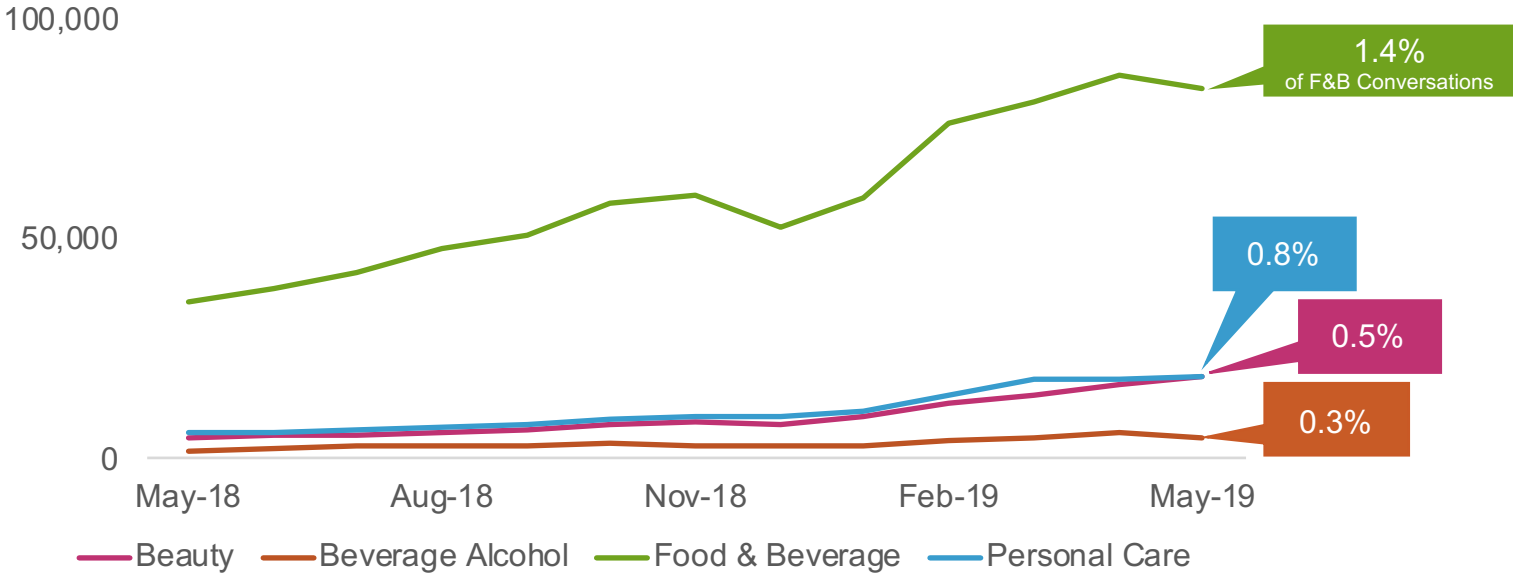


Oils—especially CBD and hemp oils—have seen the most YoY growth in consumer conversations.

And while consumers discussed THC in all markets, only Beauty (+70%) and Personal Care (+27%) saw meaningful increases.

CBD captivates consumers

US Conversation Volume by Market



Consumer conversation volume for **CBD is up and to the right across the board, but it's especially hot in Food & Beverage.**

While consumer interest is increasing, CBD isn't a major topic of conversation in any of these markets just yet.



What's the difference between Beauty and Personal Care?
Beauty includes color cosmetics, facial skincare & nails, while Personal Care encompasses bath & body, haircare, and topical care products.



Interest in CBD is growing

Beauty
+279%



Beverage Alcohol
+168%



Food & Beverage
+146%



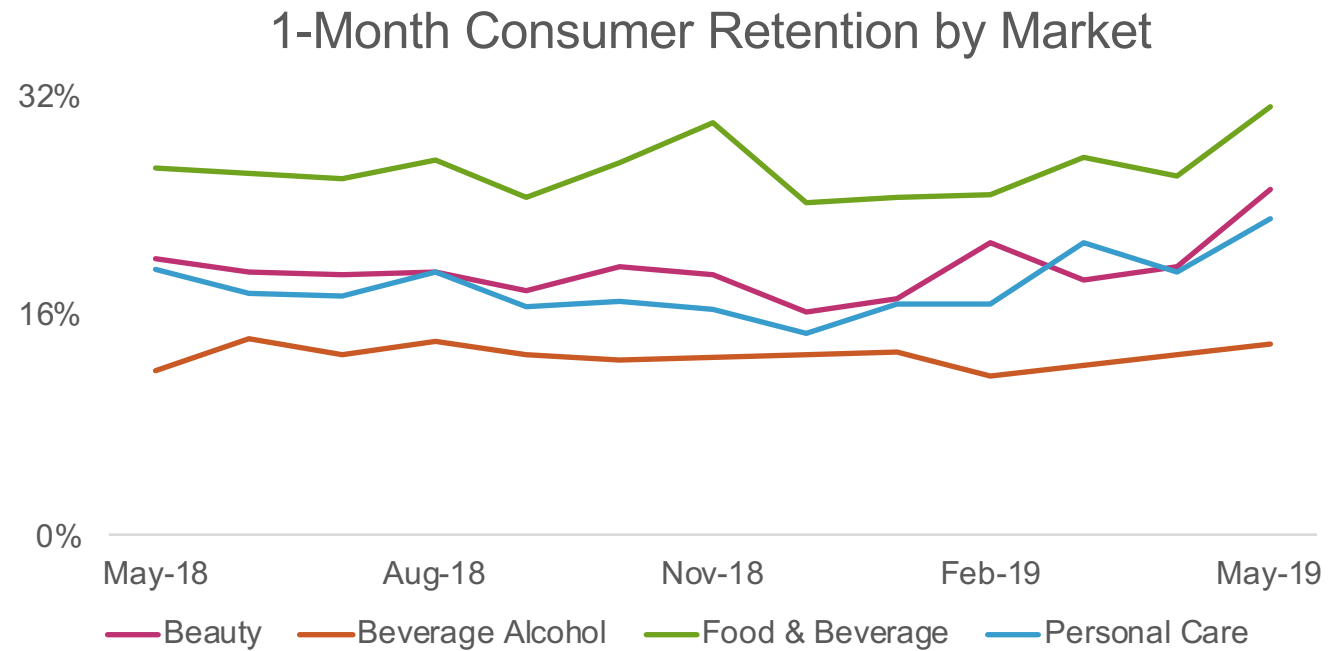
Personal Care
+197%



Over the last year, CBD has seen **impressive growth** relative to all of these markets. This is remarkable considering there are **ongoing battles** over CBD's state-level legality, its inclusion in food and beverage products, and how far brands can take functional benefit claims.



CBD's consumer loyalty



Consumer retention—the percentage of month-over-month repeat conversations—is a signal of staying power strongly associated with the presence of a trend.

CBD has the highest consumer loyalty in F&B, but relatively steady retention in all markets indicates that CBD is a trend.



CBD's core traits

Healing, Anxiety, Pain, and **Wellness** are the top traits that consistently arise alongside CBD across multiple markets.

These core traits are mentioned **more frequently with CBD** (high penetration) and **more significantly with CBD** (high over-indexing) than the average topic in each market.

	Beauty		Beverage Alcohol		Food & Beverage		Personal Care	
	Penetration	Index ▼	Penetration	Index	Penetration	Index	Penetration	Index
Anxiety*	6.1%	18.0x	4.6%	13.3x	11.8%	23.2x	10.0%	11.6x
Healing	13.5%	16.5x	8.3%	24.5x	21.4%	28.8x	23.6%	15.7x
Pain	10.5%	15.8x	4.6%	12.9x	12.2%	19.0x	22.0%	11.8x
Wellness	16.2%	11.1x	6.4%	9.5x	14.8%	8.8x	15.1%	5.2x

* **Read as:** Anxiety is mentioned in 6.1% of consumer conversations about CBD, which is 18.0x higher than in the average Beauty conversation.



CBD deep dives by market

Along with these high-level insights, we've prepared reports on CBD in:



Beauty



Beverage Alcohol



Food & Beverage



Personal Care

With each report you'll get access to:

- **Detailed Consumer Profiles** of who's driving the use of CBD in your category and their key motivations.
- **Trends in CBD Products & Ingredients** that are winning with consumers, plus which categories and products are ripe for disruption.
- **Consumer Perceptions of CBD's** core traits and the most popular qualities in each market.
- **Strategic Opportunities** for introducing CBD into your product portfolio and capturing market share.

Order an in-depth PDF report on CBD in the market of your choice.

Pricing:
\$15,000 USD per report

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social standards

Social Standards' Consumer Analytics and Influencer Analytics platforms empower brands with deep, contextualized analysis of their market and consumers. Detailed data is organized into actionable comparative insights available through custom reports or self-service tools for in-house analysts.

If you have any questions about this report or would like to see a demo of the Social Standards platform, please contact us!
contact@socialstandards.com

