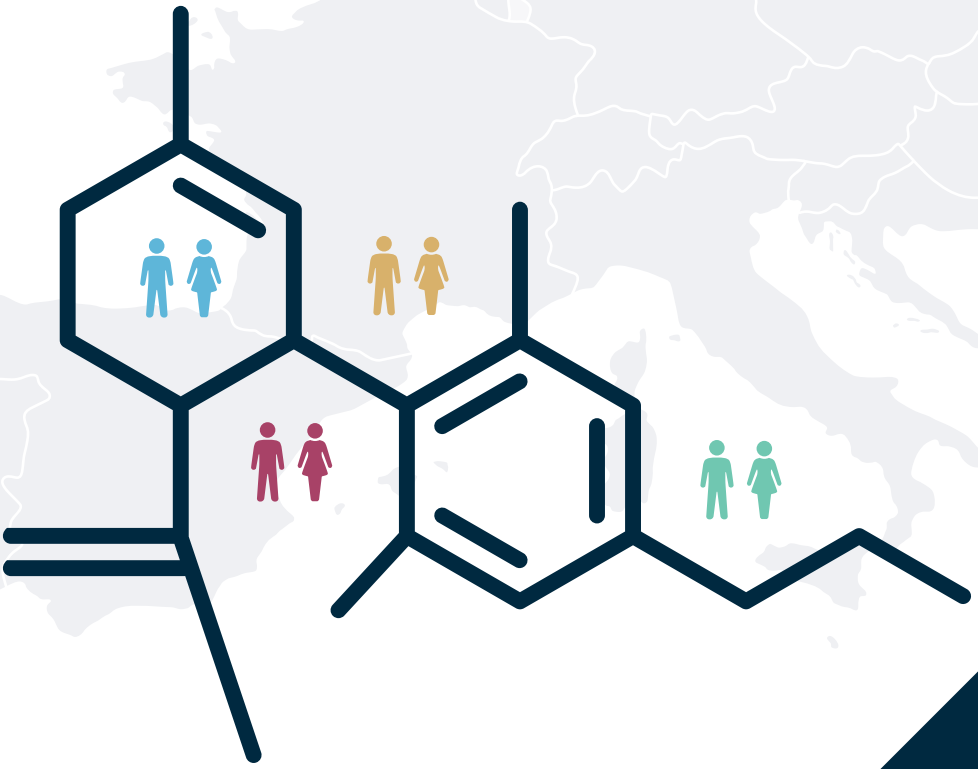
VOLUME II

THE EU CBD CONSUMER REPORT SERIES: SEGMENTATION & ARCHETYPES

EXECUTIVE SUMMARY



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EXECUTIVE SUMMARY

As the active ingredient cannabidiol (CBD) from cannabis has undergone an explosive growth in popularity, consumers in the European Union (EU) are increasingly being exposed to information and products—and trying to understand the cannabinoid's potential and how it might best fit into their lives. As of February 2020, within the EU's 27 member states, its 445 million citizens find increasing opportunities to participate in the burgeoning CBD market, and brands will play a critical role in defining their experiences.

Having already covered general attitudes and trends while providing regional market profiles in New Frontier Data's ***EU CBD Consumer Report: 2019 Overview***, this report examines mindsets, attitudes, and behaviors among CBD consumers and nonconsumers.

By segmenting consumers by age, gender, and primary reason for using CBD, and introducing nine archetypes of CBD consumers and nonconsumers, the research reflects a broad range of opinions, beliefs , and disparate motives driving CBD use. By providing data-driven insights of both consumer and nonconsumer behavior, opportunities are identified to address consumer priorities while drawing attention to the various intentions and concerns which permeate the CBD space.

To foster a more holistic understanding about why an individual chooses to consume or abstain from CBD, New Frontier Data provides a second exhaustive overview of the European CBD marketplace and consumer experience.

SURVEY THEMES: Awareness about and use of CBD, reasons for use or abstention, purchasing decisions, forms and frequency of use, policy beliefs, and concerns regarding CBD consumption by age, gender, and consumer archetype.

SURVEY OVERVIEW

SAMPLE SIZE	MARGIN OF ERROR
3,101	**±1.76%**

FIELDING DATES	METHODOLOGY
October 8-17, 2019	**Online Survey**

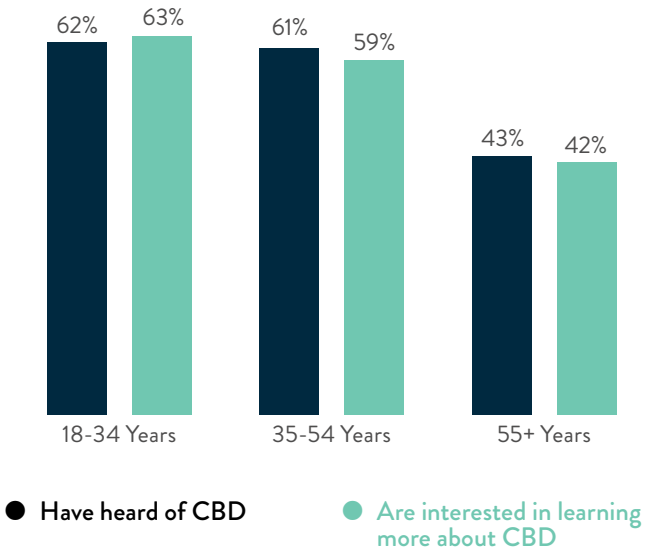
Key Consumer Segmentation Insights Include:

- Nearly half of age groups 18 to 34 and 35 to 54-year-olds (49% and 47%, respectively) express positive feelings about CBD, with less than one-third (28%) of adults 55+ feeling likewise.
- While the majority of Europeans under age 55 reported being somewhat familiar with and interested in learning more about CBD, those over age 55 expressed being both less informed and less interested.

TO DOWNLOAD THE FULL REPORT VISIT: NEWFRONTIERDATA.COM/EUCBDPT2

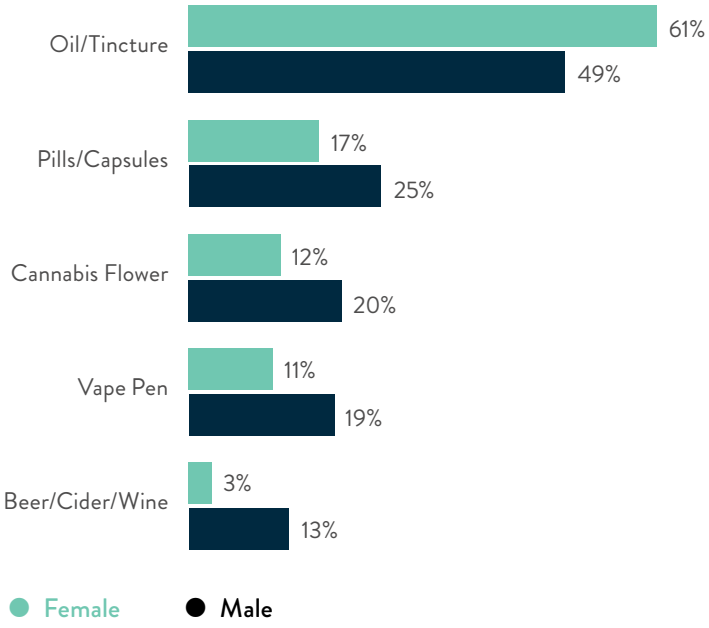
- On average, male consumers reported spending more on CBD products than female consumers, with more than a quarter of men (27%) reporting spending €100 to €199 per month.
- Oils/tinctures remained the most popular product form across all segments, with women likelier than men to have consumed such. Men reported being likelier than women to have consumed all other common forms of CBD.
- The largest proportion (31%) of consumers use CBD primarily to unwind. The remainder of consumers were evenly split between using CBD for medical reasons (23%), pain management (23%), or general wellness (22%).

CBD FAMILIARITY AND INTEREST BY AGE

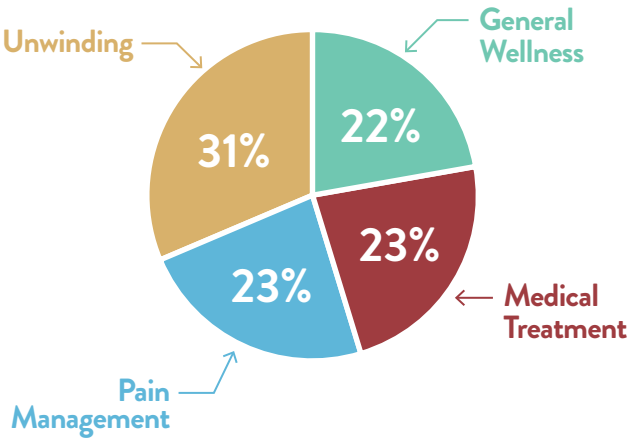


Source: New Frontier Data 2019-2020 European CBD Survey

MOST COMMON FORMS OF CBD CONSUMED BY GENDER



CBD CONSUMERS BY PRIMARY REASON FOR USE



Source: New Frontier Data 2019-2020 European CBD Survey

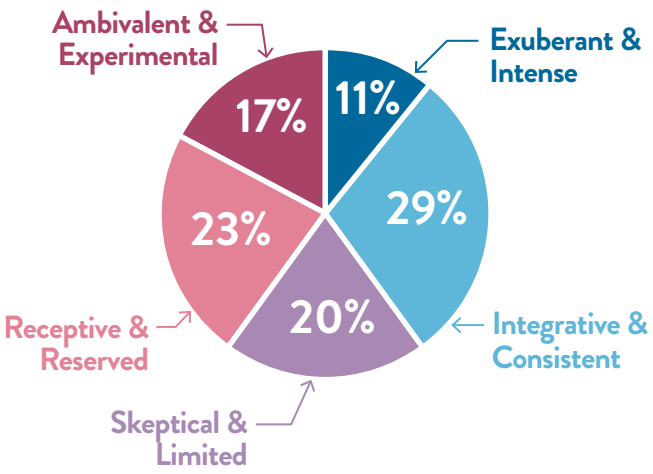
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- Despite expressing the most concern about the safety and quality of CBD products, individuals who consume for medical reasons were the most likely to recommend CBD to people they know.
- A small minority of CBD purchasers (9%) reported not consuming CBD themselves.

Key Archetype Insights Include:

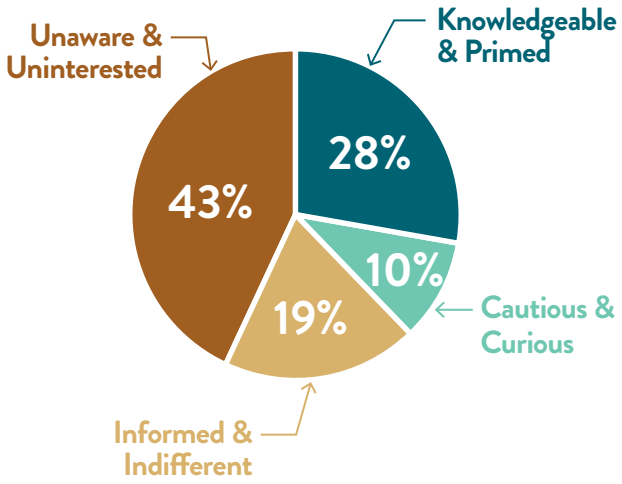
- A majority of consumers—regardless of archetype—claimed that CBD has positively affected their quality of life (54%-98%).
- Consumer archetypes vary in their frequency and intensity of CBD use, and in their orientation to products and applications of the cannabinoid. Together, they illustrate the variety of relationships which European consumers currently have regarding CBD.
- More than half of the Exuberant & Intense consumers (56%) first tried CBD less than three months prior.
- On average, 72% of consumers and 17% of nonconsumers considered themselves likely to purchase CBD in the next six months.
- Nearly half (49%) of nonconsumers reported having heard of CBD, with more than one-third (34%) somewhat or very curious about trying CBD.

2019-2020 EU CONSUMER ARCHETYPES DISTRIBUTION



Source: New Frontier Data 2019-2020 European CBD Survey

2019-2020 EU NONCONSUMER ARCHETYPES DISTRIBUTION



Source: New Frontier Data 2019-2020 European CBD Survey

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Some Key Takeaways for Industry Operators:

- Social interaction with CBD consumers remains a powerful influencing factor for an individual's willingness to engage in the market.
- Attracting older consumers will require targeted outreach and education.
- Consumers who use CBD primarily for medical or pain-related reasons differ significantly from those who use it to unwind or to promote general wellness.
- CBD companies' collective credibility is threatened by products that falsely claim to include CBD.

THIS REPORT ALSO INCLUDES:

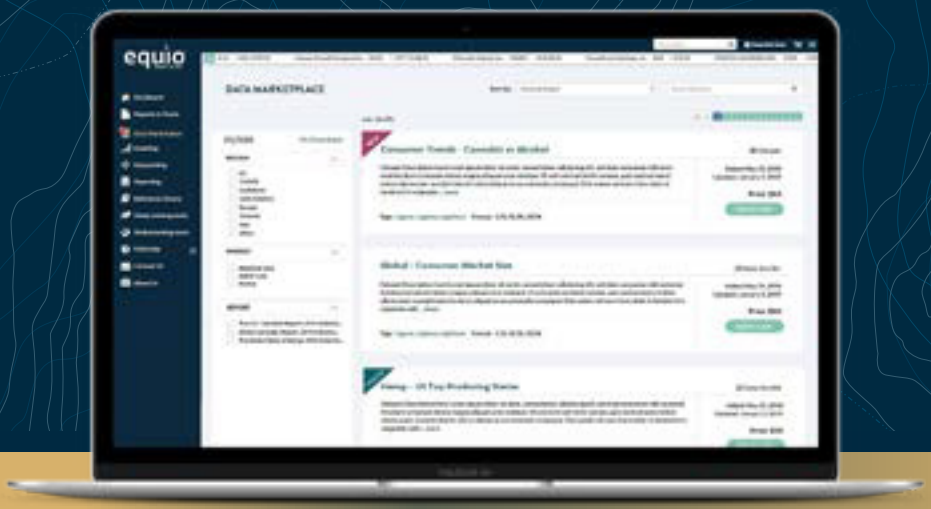
- Detailed breakdowns of use, spending, and more by age, gender, and primary motivations for using CBD;
- Health behaviors and perceptions of CBD consumers versus nonconsumers; and
- Behaviors and beliefs of those who have purchased CBD but not consumed it themselves.

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