
C(BD) of Change: How the US CBD Consumer is Evolving in 2022



Table of Contents

US CBD Consumer Insights:

Survey fielded quarterly. Responses are collected online from a census-balanced sample of 5,408 unique CBD users are 21+ in the United States.

- Page 3. [Introduction & Overview](#)
- Page 4. [Over-Time Trends](#)
- Page 6. [Product Category Spotlight: Flower](#)
- Page 8. [Consumer Insights: Ladies First](#)
- Page 11. [Persona Insights: Insomniacs](#)
- Page 12. [Product Highlight: Sleep aid](#)
- Page 14. [Key Takeaways](#)

Introduction & Overview

- Gummies remain the dominant CBD product type used, now in use by a majority of CBD consumers
- Average spend per month is down slightly across the industry as consumers shift to more targeted occasions of use and lower-priced products
- Women are spending more on CBD than men, as they are more likely to purchase higher priced product types
- Flower is one of the few product types to see growing usage (other than gummies), and the category offers plenty of room for differentiation, from positioning to highlighting cultivation methods
- Insomnia is a rising issue for many Americans, and many are turning to CBD for help



Over-Time Trends

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Over-Time Trends

A majority of consumers (51%) are willing to spend up to \$100 per month on CBD products as of Q1 2022.

Despite growth at this price bracket, **average spend is down slightly across the industry.**

42% of CBD consumers use CBD at least once per day in Q1 2022.

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Product Category Spotlight: Flower

CBD flower and pre-roll use is on the rise: **17.5% of CBD consumers used CBD flower in Q1 '22** (14.2% in Q1 '21) and **16.2% used pre-rolls** (13.4% in Q1 '21).

These consumers are more likely to be using CBD multiple times per day and 5+ days per week, making them heavy CBD consumers

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Product Category Spotlight: Flower

Nearly 3 out of 4 CBD consumers have also purchased THC products in Q1 2022.

- Half of all CBD consumers have purchased CBD products multiple times
- These figures have remained relatively steady over the last four quarters

CBD flower products available on the market today borrow from both Cannabis and tobacco branding.

- Mom Grass CBG Hemp Flower by Dad Grass uses cannabis-like packaging and appeals to consumers aware of minor cannabinoids (who likely also are cannabis consumers)
 - Nearly 48% of CBD consumers reported having purchased CBG products in Q1 2021
- CBD American Shaman's Shaman Smokes come in a cigarette-like pack and are branded as hemp cigarettes



Mom Grass CBG Hemp Flower by Dad Grass



Shaman Smokes hemp cigarettes by CBD American Shaman

Consumer Insights: Ladies First

Women have always purchased more CBD products than men, but they also spend more per CBD products than men.

This is mostly driven by women's greater use of higher-priced product formats.

Women are also more likely to purchase gummies, a growing product format (56% for women vs. 51% for men).

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Consumer Insights: Ladies First

Women also are more likely to be aware of THC than men.

Men, for their part, are generally more aware of other minor cannabinoids such as CBC, CBG, CBN and CBT.

Coupling CBD with other minor cannabinoids in product formulation can potentially entice male CBD consumers to try a brand's products.

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Consumer Insights: Ladies First

A handful of brands have been making inroads with female consumers: Hempworx (3.6% of female consumers have purchased in the last 6 months vs. 3% for all consumers); Lazarus Naturals and HempFusion (3.1% of female consumers purchased each in the last 6 months vs. 2.6% for all consumers).

Hempworx's social media features many female consumers in non-exploitative framings, likely appealing to women CBD consumers.

HempFusion's core-priced capsules target common need states for women, including stress, and leverage other functional ingredients like ashwagandha.



Persona Insights: Insomniacs

According to the [American Journal of Managed Care](#), up to 40% of Americans suffer insomnia symptoms at some point in a year. Additionally, 1 in 5 short-term insomnia cases will turn chronic.

Trends indicate insomnia is becoming more prevalent in Americans.

Insomniacs tend to be highly analytic (a potential factor in their inability to fall asleep). Brands targeting this group should consider avoiding emotional language in their marketing in favor of factual, science-based education.

Insomniacs generally identify as moderately luxurious, but fickle. They will be willing to try higher-priced products to find relief but will move on relatively quickly if products fail to meet their needs or stop being effective.

As they are looking for relief, they are more likely to try all product types.

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Product Highlight: Sleep Aid

The “Go the F**k to Sleep” Exhausted Peppermint Tincture is a recently launched CBD product targeted for sleep.

Its high dose of CBD (1,450mg per 1 oz. bottle) is mixed with CBN.

At a \$69/bottle price, it is one of the least expensive products on a per milligram of CBD basis.

- Less than \$0.05 per milligram, well under the industry average (\$0.10/mg)

This product is targeted at Insomniacs and Stressed-Out Millennials.

- SOMs are also more mindful of product price, making this product a great value to this consumer group

Brand awareness is boosted by referencing namesake book.

- The tincture is also available with the book in a bundle for an additional \$20

Released January 2022



Product Highlight: Sleep Aid

Bluebird Botanicals' Downshift blend features CBD alongside the minor cannabinoid CBN, plus beta-caryophyllene and linalool terpenes.

CBN continues to make its way into nighttime CBD formulations, but the brand's addition of linalool and beta-caryophyllene terpenes make this product appealing to knowledgeable cannabinoid fans.

3mg CBN and 12mg CBD per serving

\$49.95 per bottle, \$29.97 per bottle with subscription

- The subscription model makes this product especially affordable on a per mg of CBD basis

Released Q1 2021



Key Takeaways

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