

What do they think about Cannabis?
A deep dive into feelings and opinions of consumers
from the Netherlands, Spain and Thailand

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Global Cannabis Market Overview

In the past decade cannabis has emerged from being considered a narcotic into the mainstream with applications from skin cream to food & beverages, vaping products and even pet food.

Its growth has been exponential, and the global legal cannabis market is projected to reach from US\$58¹ to US\$82² billion in the next three to four years.

¹ BDSA June 2024,

<https://bdsa.com/press-release/bdsa-forecasts-global-legal-cannabis-sales-to-hit-58-billion-in-2028/>

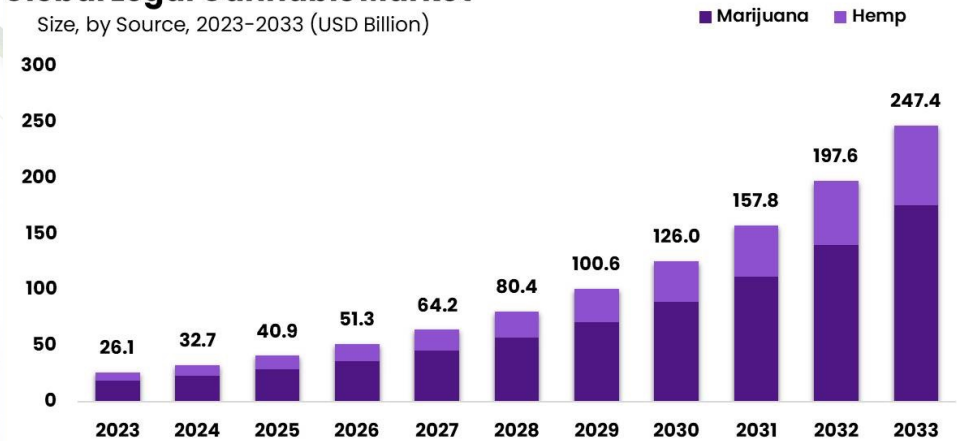
² Markets and Markets February 2024,

<https://www.marketsandmarkets.com/Market-Reports/cannabis-market-201768301.html>

This exponential growth brings with it opportunities for market researchers and strategists.

Global Legal Cannabis Market

Size, by Source, 2023–2033 (USD Billion)



The Market will Grow
At the CAGR of

25.2%

The Forecasted Market
Size for 2033 in USD

\$ 235.3 Bn

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Background



Netherlands: Cannabis toleration policy since 1976: Consumers can possess up to five grams of marijuana or maximum five cannabis plants. Coffeeshops can sell small quantities of soft drugs without being prosecuted. Currently Dutch Government **'Experiment controlled cannabis supply chain'**: 10 selected growers and 10 municipalities.



Spain: Use of cannabis in **private** and in **cannabis clubs** was decriminalised in 2015, but its **use in public is still subject to penalties** and **medicinal use is still highly restricted**. Commercialisation of cannabidiol (**CBD**) products are legal, but **subject to a series of restrictions** which exclude it being used in products for direct internal consumption.



Thailand: Cannabis was decriminalised by the Thai Government on 9 June 2022. For now, **policy and rules are not clear set and uncontrolled sales of cannabis for recreational use** takes place in Thailand. In beginning of 2024 discussion if cannabis back on narcotics list. New Prime Minister since August 2024 has with latest draft bill abandoned to re-classify cannabis as 'narcotic' and no explicit clause that outlaws recreational use.

Methodology:

- Desk research
- Store observations
- Interviews (mainly online):
N=17 in Netherlands (2023/24)
N=10 in Spain (2024)
N=16 in Thailand (2023/24)
- Online survey N=100 per market with *Research Clever* that had access to global panel networks through API Integration.

Interviews Recruitment:

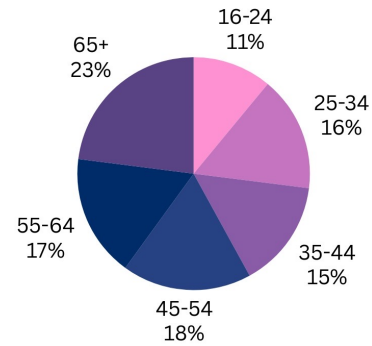
- Consumers mostly recruited through own network/social media. Those that have heard of cannabis (preferably also cannabidiol (CBD), not necessarily users.
- A selection of professionals in cannabis industry such as Drugs research institute, Cannabis/CBD retailer/ seed trader, Dispensary Pharmacy/Health store, and Smoking Club owner

**Online survey End of Aug 2024,
We asked consumers five questions.**



50% 50% 0%

Age distribution (16+):



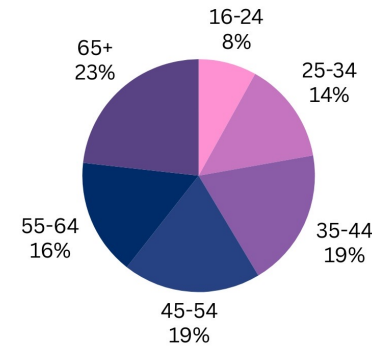
Children: yes/no



59% yes



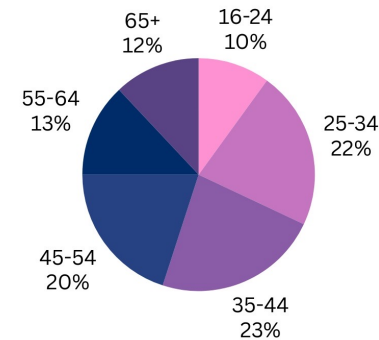
51% 49% 0%



60% yes



51% 49% 0%



56% yes

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What do you know about cannabis in your market? Perception and appropriate regulations



- Cannabis is **tolerated** in the Netherlands.
- Cannabis can be used for **recreational or medical usage**.
- 'My parents were from the generation that all drugs are bad, I am from the generation that everyone from my age has smoked a joint or has come in contact with it.' (Female, 26-40 years old)
- **Few respondents know about 'Experiment Controlled cannabis supply chain'**: 'I think this experiment is mostly focused on getting the VAT income from growers and then the coffeshops. Advantage is that with state weed you can guarantee a certain quality.' (Male, 50+ years old)
- **Dubious regulations:**

Cannabis **supply to coffeshops is illegal but its sale from the coffeshops is tolerated** (Male, 26-40 years old)

Cannabis, alcohol and tobacco should go together in same path of regulatory frameworks. (Male, 50+ years old)



- **Cannabidiol (CBD) is clearly understood to be legal**, with shops openly displaying products.
- However, cannabis with **THC generates confusion as laws exist prohibiting it**, but on the other hand **smoking clubs operate as registered associations**:
 - I know that legally it cannot be transported, or cultivated, or consumed or anything. But there are smoking clubs... I don't understand under what law they are allowed to still exist. (Female, 41-50 years old)
- Most feel **avoid public consumption and possession as they fear the possibility of being fined**:

It is allowed and not allowed, but for the police it is a way to collect money through fines. So, **it's like a trap and kept unclear on purpose**. (Male, 50+ years old)



- **Cannabis regulation is not clear**.
- Cannabis is used for **recreational or medical usage**.
- **Cannabis is trendy (less already now in 2024)**.
- **CBD/Cannabis restricted promotion/ social media**: 'On social media it is restricted to promote CBD. For example, for TikTok if you just mention CBD or cannabis your entire account gets blocked. We promote mostly through direct events to our target audience.' (Cannabis/CBD retailer)
- **Suggested strict regulations/police enforcement on**: Driving & cannabis usage, smoking clubs that allow cannabis usage vary by weight/gender/age etc. Not allowed to consume in public spaces. Growers register with government and can grow in dedicated areas monitored by government, regulation on maximum cannabis content in products, warning on product like with cigarette. Similar to alcohol and cigarette legislation with ID check and store certified by government.

Most appropriate channels to inform about cannabis news/regulations?



Opinion is more aligned:

- **NOS national news, national newspapers (offline and online), online also Nu.nl together with Dutch Government:**

NOS news bulletin would share this but it would come from Dutch Government which could be Ministry of Health or Legal Affairs depending the topic. (Male, 41-50 years old)

- **RIVM** (National Institute for Public Health and the Environment, independent agency of Ministry of Health, Welfare and Sport)

For cannabis in general through the Dutch Government or **GGZ, Dutch Association of Mental Health and Addiction Care**. Or for medical cannabis through **hospital or pharmacists**. (Female, 20-25 years old)

And:

- **Coffeshop holders:** information and leaflets in coffeshops to its users.
- **TikTok and Instagram** for young target group (16+)
- **Not much publicity on drugs/cannabis topic. Simply because this is not allowed and not everyone is concerned, neither interested.**
- **Bureau Medicinal Cannabis** (Government): <https://www.cannabisbureau.nl/>



Opinion is fairly disparate:

- Some would prefer to see a more proactive approach from **official government media such as the public television:**

It should be given in **official government media like any other health issue**. We all pay for public television that could serve that purpose. (Male, 26-40)

- Younger generations prefer **digital sources such as social media, apps and websites**, though admittedly the information **might be biased:**

I would search for information on Google, but **since it is a taboo subject it is difficult to find information that is not biased**. (Female, 20-25)

- A few others still prefer **word of mouth**, but from **credible sources:**

A friend or close person with a lot of experience on the subject that really know the reality of it. (Male, 20-25 years old)



Opinion on channels fairly disparate, but mostly aligned on sources:

- **Social media with information on how to use it esp. Gen Z and Line for older age groups:**

FB would be an effective way because of lot of people in Thailand use it. **Even my parents use it**. (Female, 26-40 years old)

Instagram because it has 'story' and then use a celebrity because it's credible and has many followers. (Female 20-25 years old)

- **Cannabis retailers:**

If I want to know how to use it, I may go to a seller who lives nearby my house. If I want to know about the regulation, I would go to another vendor who sells bigger volumes. (Female, 41-50 years old)

- **Most agree source should be Thai National Government/ Trustworthy/Official authority: Ministry of Health, scholar or doctor.**
- **Local authority that can really access anyone, even the ones in rural (in person)**

Your perception about cannabis usage and appropriate regulations?



Three camps:

- **Negative perception:**

Cannabis is a type of drugs, **why** would you use that? (Female 26-40 years old)

- **Positive and negative:**

Dutch government should explain the drawbacks of **possible addiction but also explain its positive side:** reduce pain, beneficial for Parkinson patients, mind blowing which can be seen as therapeutical. (Male, 50+ years old)

Weed and CBD can be good but its usage needs to be monitored and CBD prescribed/ monitored by professional authorities such as GP or psychiatrist. (Female 20-25 years old)



Three camps:

- **Negative:** Overall, **Spain is characterized by a high degree of tolerance**, though some did put some emphasis on the negative impacts, especially of consumption in public:

I always argue that smoking should not be done near children, in closed places, near schools and so on. **I think it's illegal to smoke a joint on the street, but people do it anyway.** (Female, 20-25 years old)

- **Positive and negative:**

I am in favour of legalising possession and recreational use, as they have done in Germany. These measures have turned sellers into legal companies, but a study would have to be done to **allow consumption without disturbing children, pregnant women and other possible victims.** (Female, 41-50 years old)



Three camps:

- **Negative perception:**

I'm against cannabis usage in Thailand. I am some-what aware about its medical benefit but this would be **hard to control and may cause social damage which is hard to correct.** (Female, 50+ years old)

- **Positive and negative: Appropriate medical usage:**

Appropriate usage is important, and also **education on how to use it and how much**, along with **appropriate regulation** on where it can be sold and how to purchase, and if a medical certificate is needed. (Male, 41-50 years old)

- **Positive and negative: Appropriate medical and recreational usage:**

We need **regulation similar to tobacco and alcohol drinks** such as minimum age, specific spaces for usage etc. And we need effective enforcement by police to really implement the law. (Male, 26-40 years old)

Your perception about cannabis usage and appropriate regulations?



- **Positive perception: It is calming:**

Cannabis is to make you calmer: I cannot call it drugs, it is a more **friendly and a better way to become calm than strong painkillers** such as morphine. (Female, 50+ years old)

- **Positive about natural cannabis:**

I mean here **natural marijuana not the manipulated varieties** that are too strong and it is said that pesticides are used. (Male 41-50 years old)



- **Positive perception: Tax generation**

Regulation of recreational use is poorly managed and not in accordance with the reality on the street. Its too restrictive and **should be treated like tobacco or alcohol, generating more taxes, and removing the stigma** that cannabis smokers have in our society. (Male, 26-40 years old)

- **Positive perception: Individual freedoms**

I consider that it is just another plant and the law is totally restrictive and controlling of **something that is within the freedom of the individual**. It should be repealed completely because **the law is based on creating more fear and only helps the dealer that sells it illegally**. (Male, 20-25 years old)



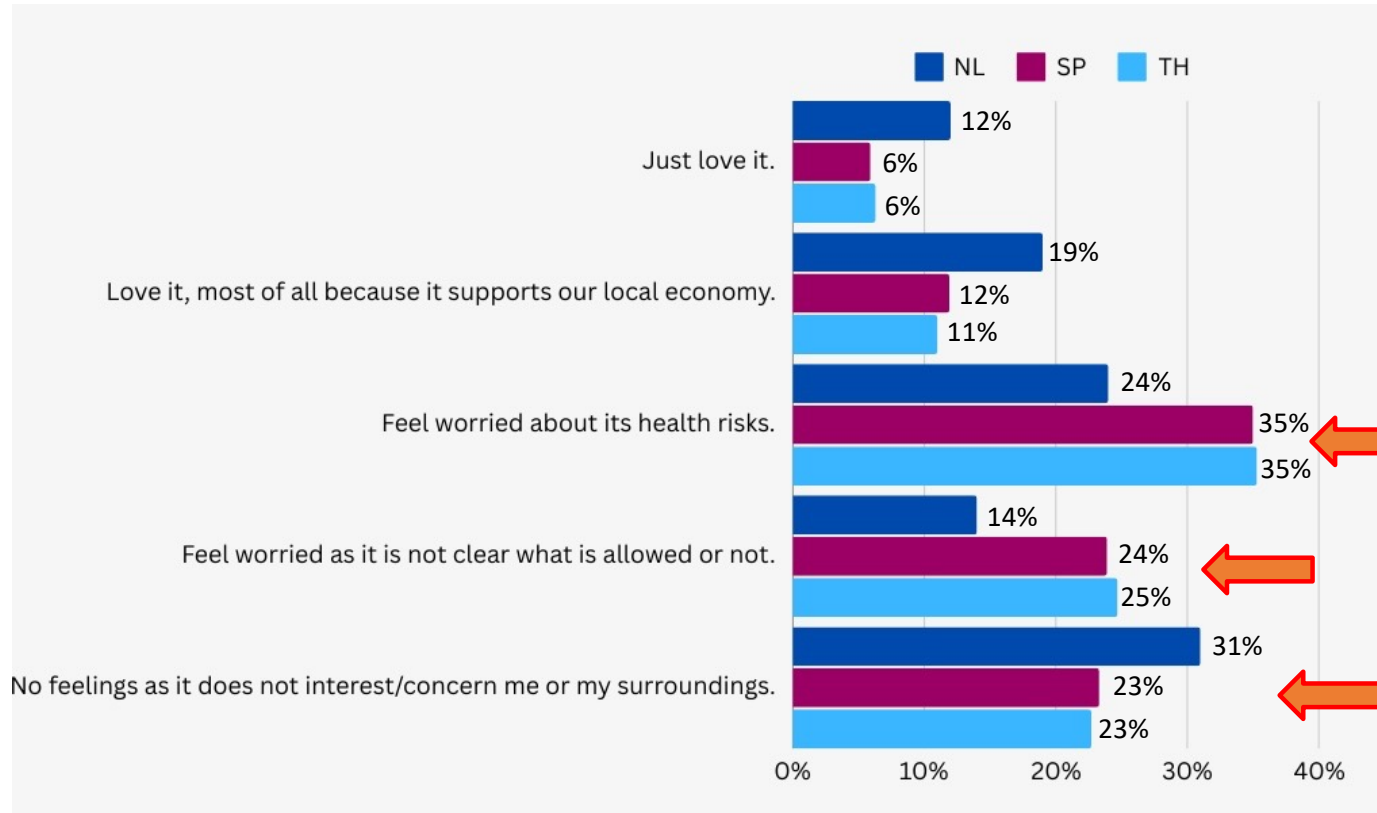
- **Positive perception: Business opportunity/ Multiple purpose.**

The Government should encourage people to grow cannabis because it **can stimulate the business** because it draws the foreigners into Thailand. (Male, 20-25 years old)

Cannabis **can be used for food, medical** and also smoking. (Female 26-40 years old)

We can use cannabis in **making a soup I saw in my FB feed**. (Female, 41-50 years old)

Q1: How do you feel about cannabis sales in your country? (single answer)



N=100 collected per market at end Aug 2024
NL= Netherlands
SP=Spain
TH=Thailand

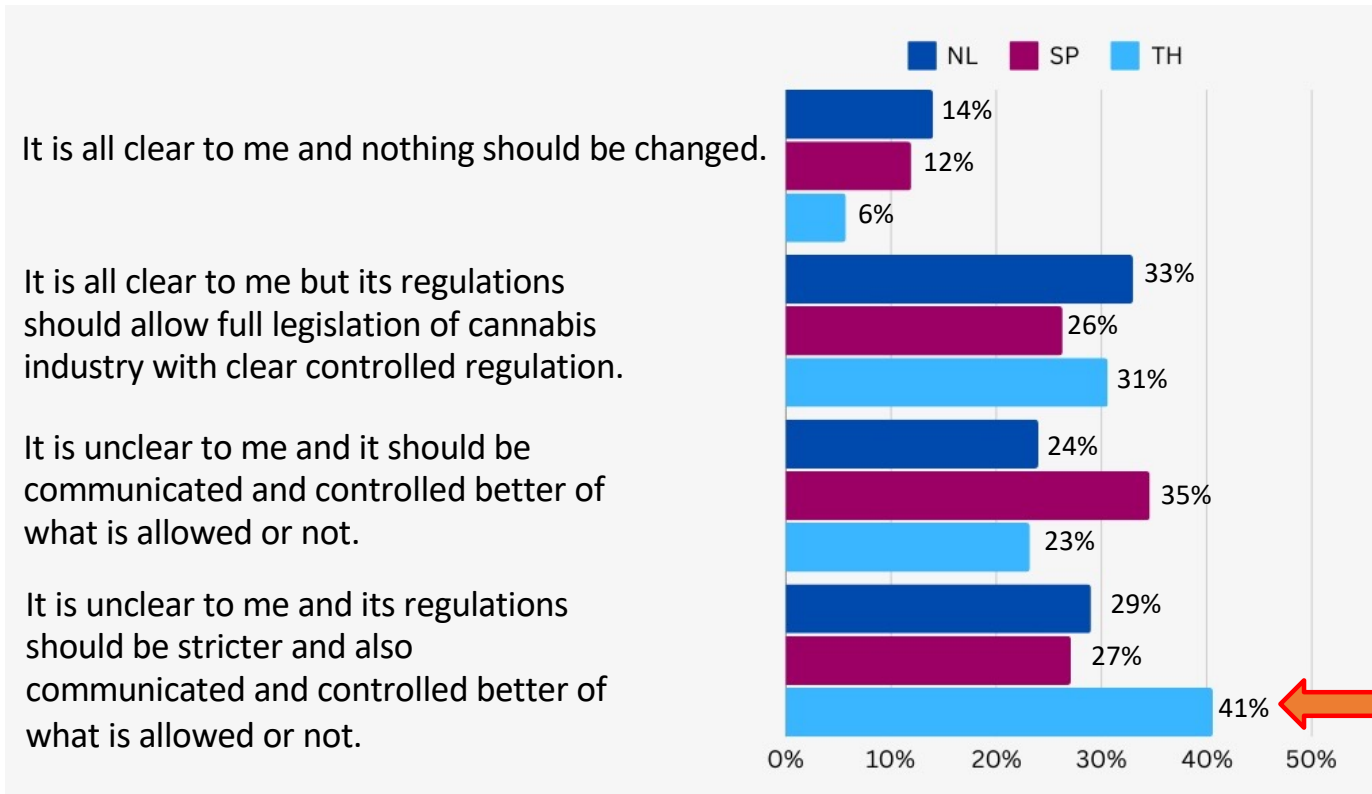
Research Clever had access to global panel networks through API Integration.

More than a third (35%) in both Spain and Thailand are worried about its health risks and a quarter (24%-25%) feels worried as it is not clear what is allowed or not. This is significantly lower in the Netherlands. In the Netherlands close to one third (31%) answered 'No feelings as it does not interest/concern me or my surroundings'.

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Q2: What do you think about cannabis regulations in your country? (single answer)



N=100 collected per market at end Aug 2024

NL= Netherlands

SP=Spain

TH=Thailand

Research Clever had access to global panel networks through API Integration.

Respondents across all three markets are divided about cannabis regulations, few comment it is all clear and nothing should be changed. 41% of Thai consumers answered that cannabis regulations are unclear and its regulations should be stricter and also communicated and controlled better of what is allowed or not.

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THC (weed) and Cannabidiol (CBD) awareness?



- Majority of consumers has little knowledge about Cannabidiol (CBD) and THC.
- Weed, cannabis, cannabidiol is all the same?
- A hospice worker and former nurse cancer unit hospital commented: 'CBD is not known by me and my colleagues. **Medical world is very conservative.**' (Male, 50+ years old)
- Cannabis edibles seen as having stronger effect, more risk, misleading for children.
- Those that know and have used Cannabidiol (CBD):
 - Got referred to it by a medical professional
 - CBD is natural, supplement. THC makes you high, CBD not.
 - CBD to reduce pain/ anxiety, make you calmer/ sleep better.
 - Visited a regular drugstore and I saw a CBD product to improve sleep and I bought it.



- A majority have heard of, and understand on a basic level, both Cannabidiol (CBD) and THC.
- In general CBD is known to be the part of the cannabis plant that **does not cause intoxication and is argued to have several health benefits and understood to be legal**
- Products containing THC are either restricted or are tolerated within legal vacuums.
- Some THC smokers do not see the point of using just CBD:

I think it relaxes you and that you fall asleep better, but I'm not interested in that. **If it doesn't get me high, for me it's worthless.** (Male, 50+)

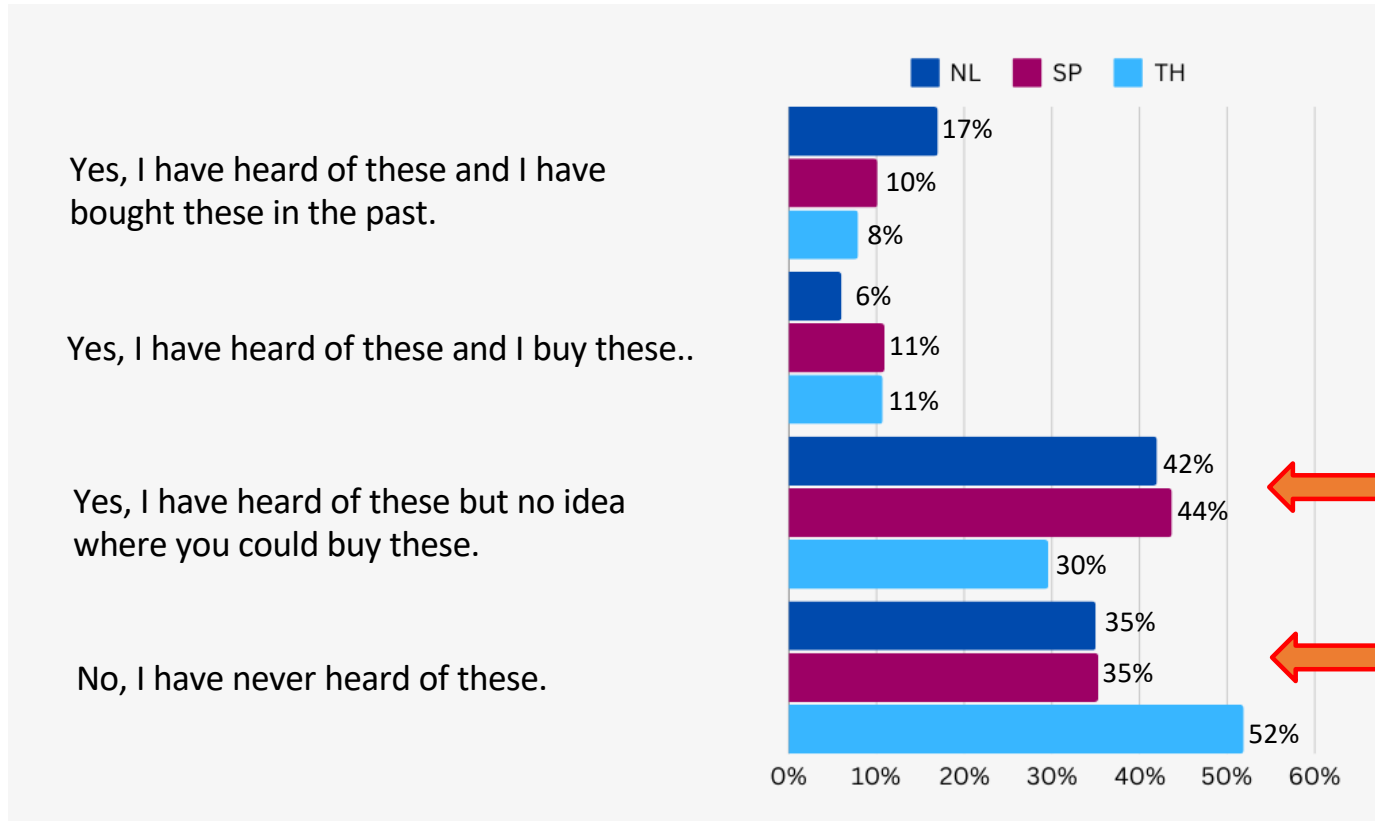


- Majority of consumers has not heard of term Cannabidiol (CBD) and THC.
- Weed, cannabis, cannabidiol is all the same? Thai consumer in general not much informed/aware about this.
- Those that know about THC and CBD:

CBD products are common as you can see them everywhere. Effect is **relaxation** and no serious impact on body. THC is also some element of cannabis but it can provide a different effect; **makes the heart beat stronger.** (Male 26-40 years old)

THC reminds me of an addictive drug. (Male, 50+ years old)

Q3: Have you heard about cannabidiol (CBD) products? (single answer)



N=100 collected per market at end Aug 2024
NL= Netherlands
SP=Spain
TH=Thailand

Research Clever had access to global panel networks through API Integration.

Across the three markets: More than two out of five (41%) respondents have never heard of CBD; highest percentage in Thailand at 52%. Close to two out of five (38%) have heard of CBD but no idea where you could buy these.

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Cannabis: Cannabidiol (CBD) perception?



- **Just some have some knowledge on CBD (used or not) and comments:**
 - Many varieties, highest quality seem from pharmacies.
 - CBD associated with a calming effect/reduced stress, natural, medicinal cannabis. Possible mental dependence: can be controlled more via prescription.
 - CBD interest seems to decrease as many in the market that do not work.
 - CBD is preventive/ activates your body to decrease symptoms, similar to acupuncture or hypnosis.
 - CBD does not have attractive taste.

Many of our clients think that CBD is linked to weed, that it has very strong/heavy effects.
(Leading CBD brand owner)



- **Cannabidiol (CBD) perceptions of those who are aware but haven't tried:**

- A minority see **CBD as potentially leading to consumption of products with THC:**

I think CBD is a **gateway drug** before moving on to THC. (Female, 20-25 years old)

- Others see it as **too easily confused with cannabis containing THC:**

I don't buy it because you can't carry it on the street as the **police will think it's marijuana and issue a fine**, and only after it is sent to be analysed will they see it doesn't have THC and then **maybe nullify the fine, but it'd be a lot of hassle for you anyway.** (Male, 50+)

- A few are **aware of its medicinal benefits:**

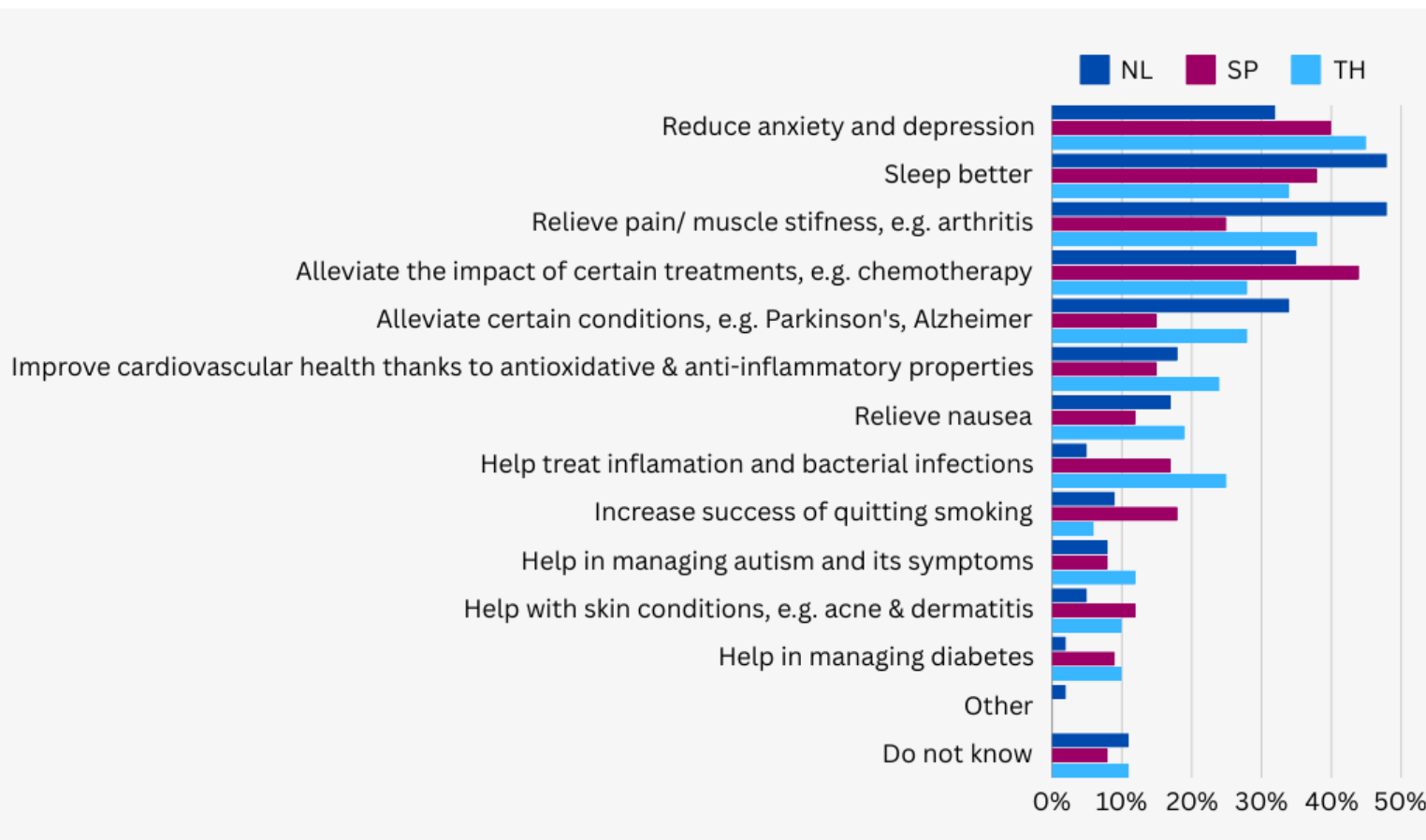
I know that it is used in the form of drops in **palliative patients** and people with **cancer and autism**. It is also used recreationally and is legal like cigarettes or vapes. (Male, 26-40 years old)



- **Few know CBD (used or not) and comment:**

- It reduces stress
- Common: something anyone can try.
- CBD not harmful
- Good products being those that really help/ work.

Q4: What is your perception of what cannabidiol (CBD) products are for? (Multiple answers – Do not know mutually exclusive)



N=100 collected per market, end Aug 2024

NL= Netherlands

SP=Spain

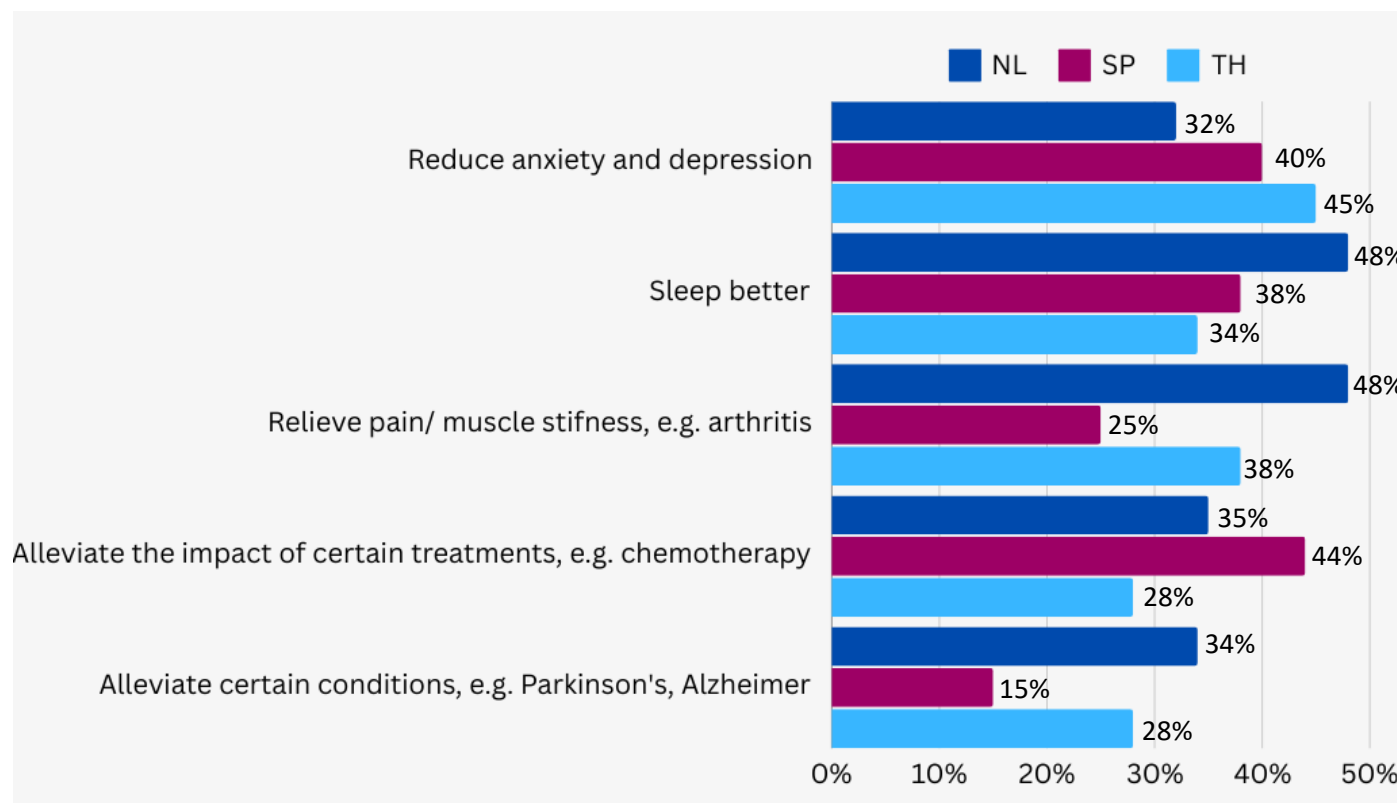
TH=Thailand

Research Clever had access to global panel networks through API Integration.

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Q4: What is your perception of what cannabidiol (CBD) products are for?
 (Multiple answers – Do not know mutually exclusive) – **Overall: Top 5 most selected**



N=100 collected per market at end Aug 2024
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 SP=Spain
 TH=Thailand

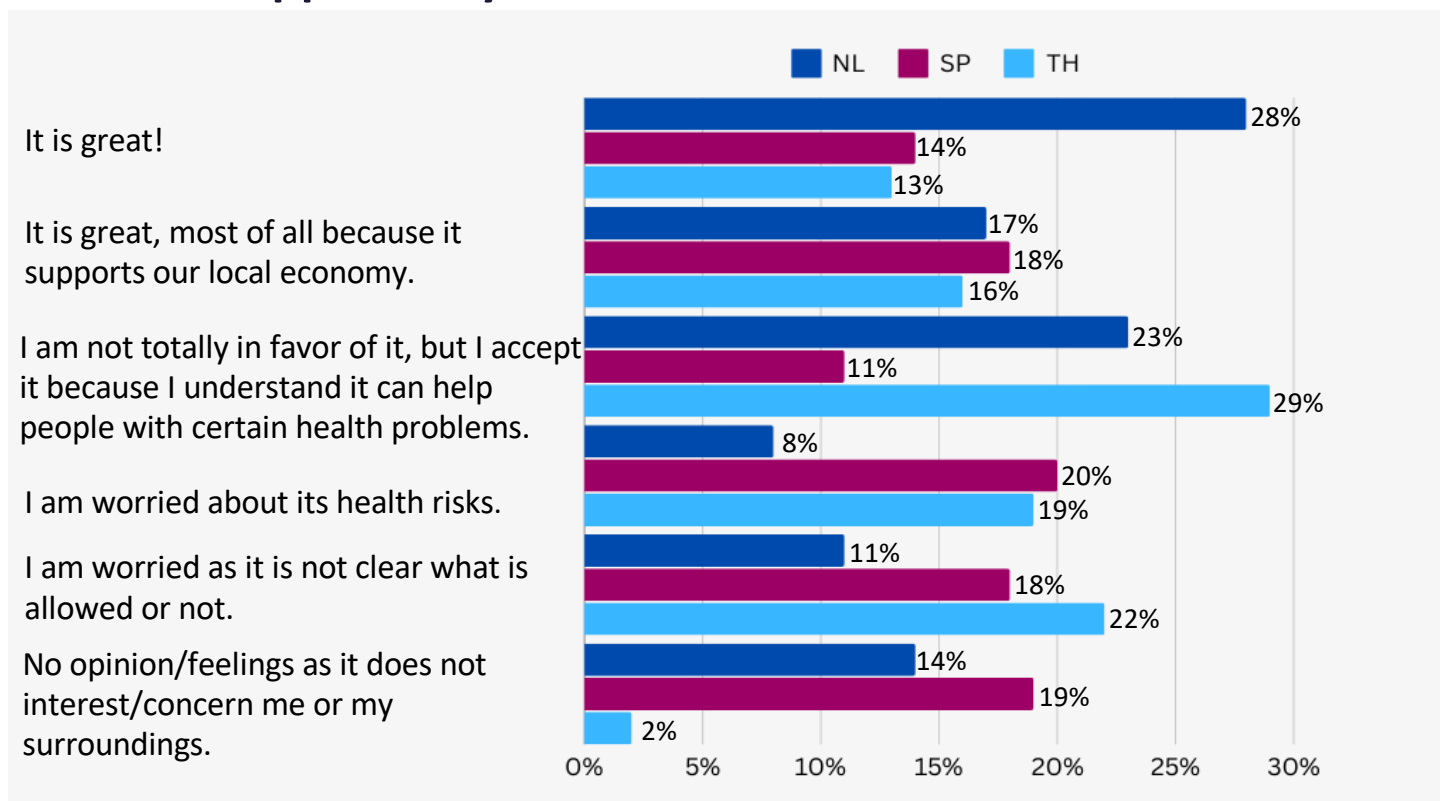
Research Clever had access to global panel networks through API Integration.

Sleep better (48%) and Relieve pain/muscle stiffness (48%) more frequently selected in Netherlands than in Spain and Thailand. Reduce anxiety and depression (45%) most mentioned of all in Thailand. Alleviate the impact of certain treatments e.g. chemotherapy (44%) most mentioned of all in Spain.

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Q5: What is your attitude towards CBD being legal? Please select the answer that most applies to you.



N=100 collected per market, end Aug 2024

NL= Netherlands

SP=Spain

TH=Thailand

Research Clever had access to global panel networks through API Integration.

Netherlands is more positive towards CBD being legal (28%), Spain largest share of worried about health risks (20%) and no opinions/feelings as does not interest/concern (19%). Thailand largest share of that can understand that can help with certain health problems (29%) but also more worried about health risks and not clear of what is allowed or not (22%).

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Share your cannabis knowledge/experience?



- Few respondents that use(d) cannabis share that with others (privacy link). Those that shared:

I recommended some people about CBD oil that knew about **my anxiety situation**. It **then appeared** that many of them knew about CBD oil already (Female, 50+ years old)

I recommend those that **have chemotherapy** to use good CBD oil that **can help to reduce side effects**. THC oil is also good but some find this too strong. (Male, 50+ years old)

For young people a **TikTok video and influencers** that should make a video about that. **Maybe at schools** with explanation how to use it in a safe way, maybe someone that knows a lot about the topic or a former heavy user that explains the risks. **Young people use and know about cannabis anyway already**. (Female, 26-40 years old).

- Role of parents to discuss with their children



- Very few share as most feel that cannabis is still a bit too controversial to speak about outside their circle of confidence:

It's a taboo subject, which can only be talked about with trusted people. Although **I don't consume it, I won't post anything about it online** because my family could see it and think I'm an addict. (Female, 20-25 years old)

- However, most would feel there should be more communication and **would like to have the better preparation for educating others, especially those who are younger and inexperienced**:

I would like to have **more complete information so that tomorrow I can inform my daughter in a real way** about the subject. It is **extremely important to inform and educate children about cannabis and other drugs**. Just by not mentioning them, they are not going away. (Male, 25 to 40 years old)



- Few respondents that use(d) cannabis or have knowledge about it share that with others (privacy link). Those that would share:

- **Share bad experience with close friends** so it would not happen to them.

Doctors should be the one who share this knowledge because they work directly with cannabis. **Teachers** should explain to students what are the pros and cons of cannabis to avoid misuse. (Male 20-25 years old)

Here in Thailand, there is an industry association in forming and there is strong interest to drive education to consumers. The industry association is called **Thai Cannabis Entrepreneur Association** (<https://tcea.asia/en/>). (Thai Cannabis retailer)

Next steps: Opportunities in Market Research

Key Aspects of cannabis markets

- New and unknown
- Diverse and rapidly changing perceptions
- Evolving regulations
- New investments
- Investments from larger established players
- Undiscovered consumer needs and uses
- Health and brand impact concerns
- Undefined product types and categories
- Interaction with sustainability
- Physical and digital retail growth

Generating demand for:

- Market sizing and growth analysis
- Perception mapping and measurement
- Cultural, branding, and semiotic analysis
- Mapping regulatory changes to consumer needs and perception changes
- Advisory to NGOs and policy makers
- Advisory to investors, entrepreneurs & startups
- New projects for existing clients
- Innovation and new product development
- CSR research
- Product attribute mapping
- Lifecycle analysis
- Traditional and digital commerce analysis.

Thank you! To watch the full presentation please go to:
<https://theicg.co.uk/recording-what-about-cannabis-a-comparison-of-three-very-distinct-markets/>

Savelsberg Research
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Henrique Savelsberg is Dutch native with close to 25 years experience in developing/managing international market research studies, recently also more UX research studies. Henrique moderates mainly in Dutch and English language, provides qualitative and strategic market research across the globe with particular focus on Europe (especially NL/BE) and (SE) Asia. Henrique offers B2B and B2C research with sector experience specifically in air travel/tourism, F&B/Foodservice, FMCG, technology, financial services and Industrial/B2B strategic market research. His local Thai research partner conducted the Thai interviews for this cannabis study.



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Originally from the US, **Brian Loeb** has lived in Spain for nearly 25 years and is bilingual in Spanish and English. He has over 25 years of experience in Strategy, Marketing and Market Research, and conducts both qualitative and quantitative market and UX research on a freelance basis across the English and Spanish-speaking worlds. He has expertise in both B2B and B2C and covers a wide variety of sectors but has a particular strength in CPG (FMCG), Tech and Telco, and Financial Services.