

## Life Sciences & the Law survey: medical cannabis

Data graphs from  
national survey

### Methodology

The following data is sourced from a survey of 1022 UK-based adults commissioned by Hill Dickinson. The survey was carried out by Instinctif Partners and Dynata in April 2020.

# Hill Dickinson – Life Sciences & the Law Survey

## Medical cannabis

According to the UN, the UK is the world's largest producer and exporter of medical (or medicinal) cannabis – described by the NHS as 'cannabis-based medicine used to relieve symptoms'. The International Narcotics Control Board's 2018 research estimated the UK's annual production of medical cannabis to be over 100,000 kg a year.

The cannabis plant, from which these medicines are derived, comprises approximately 540 natural compounds, more than 100 of which have been identified as closely-related 'cannabinoid' chemical compounds. Cannabis-based medicines utilise the plant or the cannabinoids it contains to treat ailments, such as chronic pain, seizures, and certain neurodegenerative and mental health conditions. Each cannabinoid exerts a different effect on the body; cannabidiol (CBD) and tetrahydrocannabinol (THC) are the cannabinoids most commonly used in medicines. While both have been shown to provide medical benefits, THC is the main psychoactive compound in marijuana that gives the high sensation associated with recreational marijuana use.

## A third of respondent believe cannabis to be less harmful than alcohol

Uses of medical cannabis vary in different countries based on legality as well as how the breadth and strength of the available scientific evidence is assessed. In the US, the FDA has approved two cannabinoid medicines to treat chemotherapy-associated nausea. In the UK, cannabis-based medicine Epidyolex has been approved for the treatment of two severe forms of epilepsy (Lennox-Gastaut syndrome and Dravet syndrome) and Sativex for multiple sclerosis (MS). Epidyolex and Sativex were developed by British company GW Pharmaceuticals – the largest exporter of legal medical cannabis in the world.

In recent years there has been a steady move towards deregulation of cannabis as an unlicensed medicine for medical purposes, across Europe in particular, leading to significant interest and investment in the European medical cannabis market – set to be valued at €123 billion by 2028.

As the regulatory landscape continues to shift, providing more opportunities for medical cannabis to be integrated into healthcare systems to meet patient demands, we set out to determine the UK public's views on, and understanding of, medical cannabis laws in the UK and further afield.

## Survey output

### Summary

- The majority of the UK public support the use of cannabis within a medical context and where provided by either a doctor (non-specific) or sourced from a commercial establishment
- Current UK law means that cannabis can be prescribed by a specialist doctor only, but CBD-containing products can be purchased in shops as it is not a controlled drug
- As such, UK law is perhaps stricter than the public would like it to be
- Public opinion is that legislation regarding cannabis use is more relaxed in other countries – a view held true in particular geographies, not to say the UK is the most strict

### Availability of medical cannabis and other CBD-containing products

The results showed overwhelming support for the availability of cannabis in a medical context when supplied by professionals – 82% were in favour if prescribed by a specialist doctor, dropping only to 76% in agreement with prescriptions from any doctor (disagreement in each case was <10%). Notably, the level of agreement for the latter rose with age; 69% of 18-24 year olds agreed, this value steadily increased to 88% for those aged 75 and above.

Within the survey, respondents were informed that, while both CBD and THC have been found to have medical benefits, THC is the chemical responsible for the 'high' associated with cannabis use. And yet fewer participants agreed that cannabis-based products containing only CBD should be available to purchase commercially. Younger respondents were more likely to agree: 58% of 18-24 year olds agreed, a value which fell to just 25% for ages 75+. Conversely, older respondents were more likely to disagree: 38% of those aged 75 and above disagreed. Overall, 54% agreed and 20% disagreed.

There was further division of opinion when it came to whether it is acceptable for someone to source their own cannabis to reduce chronic pain; 37% agreed, while 38% disagreed. The responses proved to be age-dependent with the proportion who agreed at 48-49% for those aged 18-34 then decreasing with age to just 13% for those above 75.



As well as believing that medical cannabis should be able to be prescribed by a specialist or non-specialist doctor, survey respondents were strongly in support that training should be given to NHS doctors so they understand the health of benefits of medical cannabis, with 80% in agreement and only 5% in disagreement.

### Legalisation of cannabis

#### Should it be legal?

Given the positive responses provided around medical cannabis being available through prescription or in shops, it is perhaps unsurprising that 72% of those asked agreed that cannabis should be legalised in the UK for medical purposes, with 8% disagreeing. The youngest (18-24) and oldest (75+) age brackets of respondents had the lowest level of agreements at 65% and 50%, respectively, while those aged 35-44 and 65-74 were the most in agreement at 76% for each.

As with differences in opinion regarding sourcing one's own cannabis for chronic pain, there was also a split view on whether cannabis should be legalised in the UK for recreational purposes; 35% agreed and 41% disagreed. Demographic data showed that those in the younger age brackets had higher proportions of agreement than disagreement and this observation was reversed for the older age brackets. The proportion who agreed aged 18-44 was 39-49%, while proportion who disagreed aged 45-75+ was 38-69%.

#### Views on benefits & safety

When asked whether participants agreed that CBD oil products that are sold as food supplements can have health benefits, 49% believed this to be case while 11% believed this to be untrue and the remainder did not know or were impartial.

Respondents were also asked whether they believe cannabis to be less harmful than alcohol. Over a third (35%) agreed, while 22% disagreed.

These beliefs in the benefits of CBD supplements and lack of health concerns could provide an explanation for the high proportion in support of legalisation of cannabis, at least in the medical context, where benefit could be seen to outweigh risk.

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It is estimated that the medical cannabis market in Europe will be worth €123 billion by 2028

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### Cost of medical cannabis in the UK

We presented an example scenario to gauge participants' beliefs around the estimated cost of medical cannabis. When asked how much it currently costs to buy the prescribed amount of medical cannabis needed to treat a child suffering from severe epilepsy for one month, responses were fairly evenly split across each option (£0-£100, £101-£300, £301-£500, £501-£750, £750+) with the greatest proportion (34%) estimating the cost to fall between £101-£300.

In the UK, the average cost of medical cannabis prescriptions sits at around £150-£250 per month for a THC and CBD-inclusive prescription, hinting at a level of public understanding. However, cost of cannabis-based treatments is dose-dependent, with conditions like severe epileptic disorders requiring much higher doses than others, so there is no one set cost to be quoted.

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Differences in the law from one country to another has created considerable uncertainty on the legality of cannabis in the UK: 24-42% responded as unsure across all questions asked

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Traditionally, THC has been expensive, yet its price has come down in recent years leading to a reduced cost of THC-containing treatments. However, without significant media coverage around this decrease, and wider reports on individual cases in which cost has been prohibitive to treatment, this could account for the 12% of respondents who estimated the cost to be above £750 per month. Further, in late 2019, NHS England struck a deal with manufacturer GW Pharmaceuticals to reduce the cost of EMA-approved Epidyolex and increase the speed of the process to enable access through prescriptions and at a lower price for patients, including children with severe epilepsy, from January 2020.

Still, the long-term needs of patients who require cannabis-derived treatments mean the current costs are not always considered economically sustainable. Interestingly, 72% of survey respondents agreed that the NHS should be able to prescribe cannabis-based medicines to patients in the UK at standard prescription charges (much cheaper than currently available), with only 10% disagreeing.

## Public perception of the legal landscape

### Prescribing medical cannabis - UK

A majority of respondents believe that medical cannabis can be legally prescribed by a doctor specialising in the condition the patient is suffering from (54%) or, indeed, by any doctor, including a GP (42%). In reality, medical cannabis is irregularly prescribed and is only considered where other treatments are not suitable or have been ineffective. UK legislation, as introduced in November 2018, is such that prescriptions of cannabis-based products for medicinal use (CBPMs) are restricted only to be given by doctors on the General Medical Council's (GMC) Specialist Register and the decision to prescribe should be agreed by the multidisciplinary team within that practice. Most patients are seen by private clinics (often after being referred by their NHS GP) with the cost of prescriptions funded privately by the individual with no public (NHS) subsidy or support.

### Commercial availability of CBD-containing products - UK

There was a split response regarding the legality of CBD-containing products with 38% believing cannabis-based products that only contain CBD as their active ingredient to be legally available to buy in UK shops and 28% believing them not to be. In the UK, these products are legally available to buy in shops, as CBD is not a controlled substance. In January 2019, CBD extract and isolate products were classified as novel food by EU law. To continue to sell these products on the UK market, businesses must submit, and have fully validated, novel food authorisation applications by 31 March 2021. In reality, it is very difficult to extract CBD and most products will contain a certain amount of THC for which a Home Office licence is technically required.

### Individual sourcing of cannabis to treat chronic pain - UK

The strongest response to any question regarding UK law was regarding whether it is legal or not in the UK to source your own cannabis to reduce chronic pain; 56% believe it not to be legal, yet 20% of survey participants still thought this to be legal. Sourcing cannabis independently to self-treat chronic pain is not legal in the UK.

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Sourcing cannabis independently to self-treat chronic pain is not legal in the UK, yet only 56% of respondents believed this to be the case

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### Rest of world

Outcomes from the survey highlighted the belief held by the UK public that countries outside of the UK have more relaxed legislation when it comes to use of cannabis; medical and recreational.

As with the UK law, respondents believe there to be legal access to medical cannabis as prescribed by a specialist doctor for the condition the patient suffers from, and by any doctor, including a GP. A greater proportion agreed compared to when it came to UK law: 62% and 60% for each scenario respectively, and there was less disagreement (5% and 6%, respectively). Furthermore, a majority believe cannabis-based products that only contain CBD are legal in other countries (53%), as is purchasing CBD oil products as food supplements (52%).

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80% of respondents would like to see NHS doctors trained in the health benefits of medical cannabis

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Notably, while most viewed sourcing cannabis independently to reduce chronic pain as not legal in the UK, this view swung to the opposite view with 44% believing it to be legal in other countries.

In reality, the legality and ease of access to cannabis for medical and recreational use varies between countries, with some geographies having greater or fewer restrictions surrounding its use. For example, the US is known for introducing legislation making recreational cannabis use legal in some, but not all, states.

A considerable level of uncertainty was noted among respondents on the legality of cannabis use in the UK and in other countries; 24-42% responded as unsure across all questions asked.

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72% support the legalisation of cannabis in the UK for medical purposes compared to only 35% for recreational purposes.

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## To what extent do you agree with the following statements related to the use of medical cannabis and other CBD containing products

1

Medical cannabis should be available if prescribed by a doctor specialising in the condition the patient is suffering from



Medical cannabis should be available if prescribed by a doctor, including a GP



Cannabis-based products that only contain CBD (a chemical in cannabis that has medical benefits) should be available to buy in the shops



CBD oil products that are sold as food supplements can have health benefits



It is okay to source your own cannabis to reduce chronic pain



● Agree/strongly agree ● Neither agree nor disagree ● Disagree/disagree strongly ● Don't know

## Considering the same statements, do you think they are currently permitted by law in the UK?

2

Medical cannabis should be available if prescribed by a doctor specialising in the condition the patient is suffering from



Medical cannabis should be available if prescribed by a doctor, including a GP



Cannabis-based products that only contain CBD (a chemical in cannabis that has medical benefits) should be available to buy in the shops



CBD oil products that are sold as food supplements can have health benefits



It is okay to source your own cannabis to reduce chronic pain



● Yes (sure or fairly sure) ● No (sure or fairly sure) ● I am not sure

## Considering the same statements, do you think they are currently permitted by law in other countries?

3

Medical cannabis should be available if prescribed by a doctor specialising in the condition the patient is suffering from

62%

6%

32%

Medical cannabis should be available if prescribed by a doctor, including a GP

60%

5%

34%

Cannabis-based products that only contain CBD (a chemical in cannabis that has medical benefits) should be available to buy in the shops

53%

9%

38%

CBD oil products that are sold as food supplements can have health benefits

52%

8%

40%

It is okay to source your own cannabis to reduce chronic pain

44%

20%

36%

● Yes (sure or fairly sure) ● No (sure or fairly sure) ● I am not sure

## Extent to which respondent agreed with the following statements related to the use of cannabis'

4

Additional training should be given to NHS doctors so they understand the health benefits of medical cannabis

80%

5%

13%

2%

Cannabis should be legalised in the UK for medical purposes

72%

8%

18%

2%

The NHS should be able to prescribe cannabis-based medicines to patients in the UK at standard prescription charges

72%

10%

15%

3%

Cannabis is less harmful than alcohol

35%

22%

30%

13%

Cannabis should be legalised in the UK for recreational purposes

35%

41%

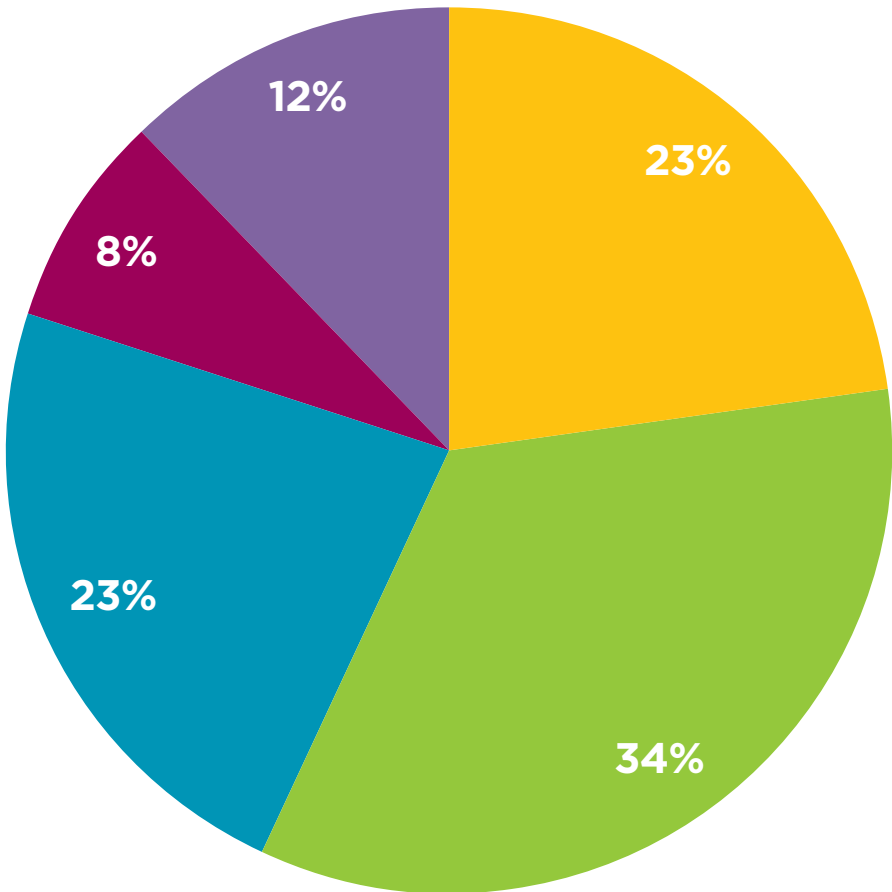
21%

3%

● Agree/strongly agree ● Neither agree nor disagree ● Disagree/disagree strongly ● Don't know

How much do you think it currently costs to buy the prescribed amount of medical cannabis needed to treat a child suffering from severe epilepsy for one month?

5

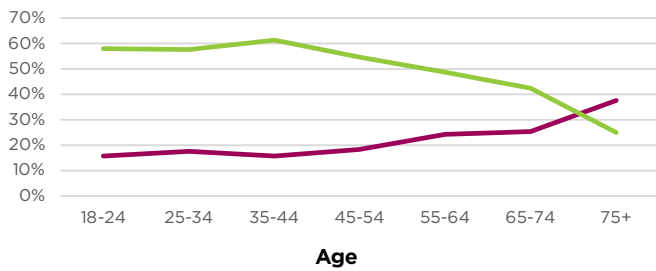


£0-£100   £101-£300   £301-£500   £501-£750   Greater than £750

## Breakdown of responses by age

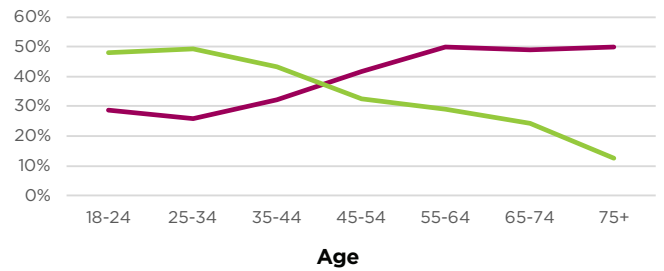
6.1

**Cannabis-based products that only contain CBD (a chemical in cannabis that has medical benefits) should be available to buy in the shops**



6.2

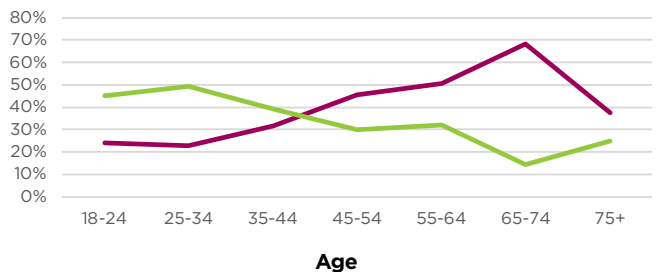
**It is okay to source your own cannabis to reduce chronic pain**



### Responses by age

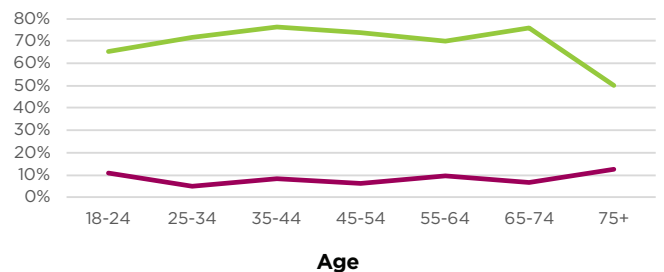
6.3

**Cannabis should be legalised in the UK for recreational purposes**



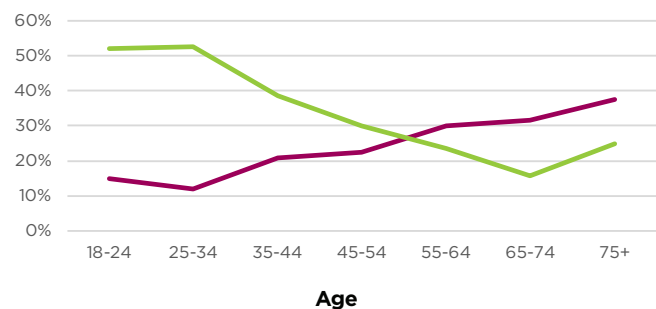
6.4

**Cannabis should be legalised in the UK for medical purposes**



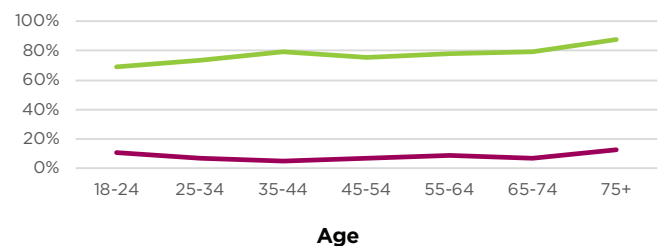
6.5

**Cannabis is less harmful than alcohol**



6.6

**Medical cannabis should be available if prescribed by any doctor, including a GP**



Disagree / Disagree strongly    Agree / Strongly agree