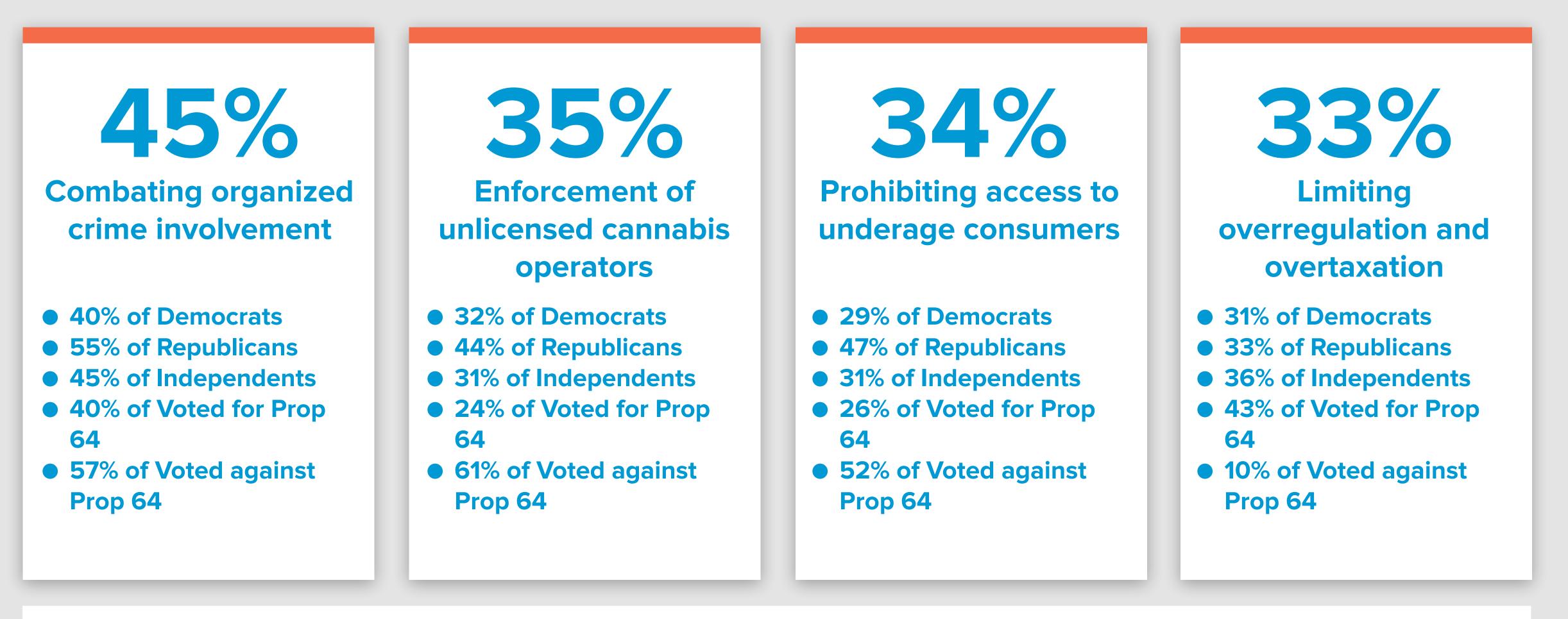
LOMPOC VALLEY CANNABIS ASSN. SURVEY

CONDUCTED ONLINE FEBRUARY 15-20, 2019 990 INTERVIEWS ACROSS SANTA BARBARA COUNTY



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What do you believe are the most important issues related to the local cannabis industry? Please select up to three.

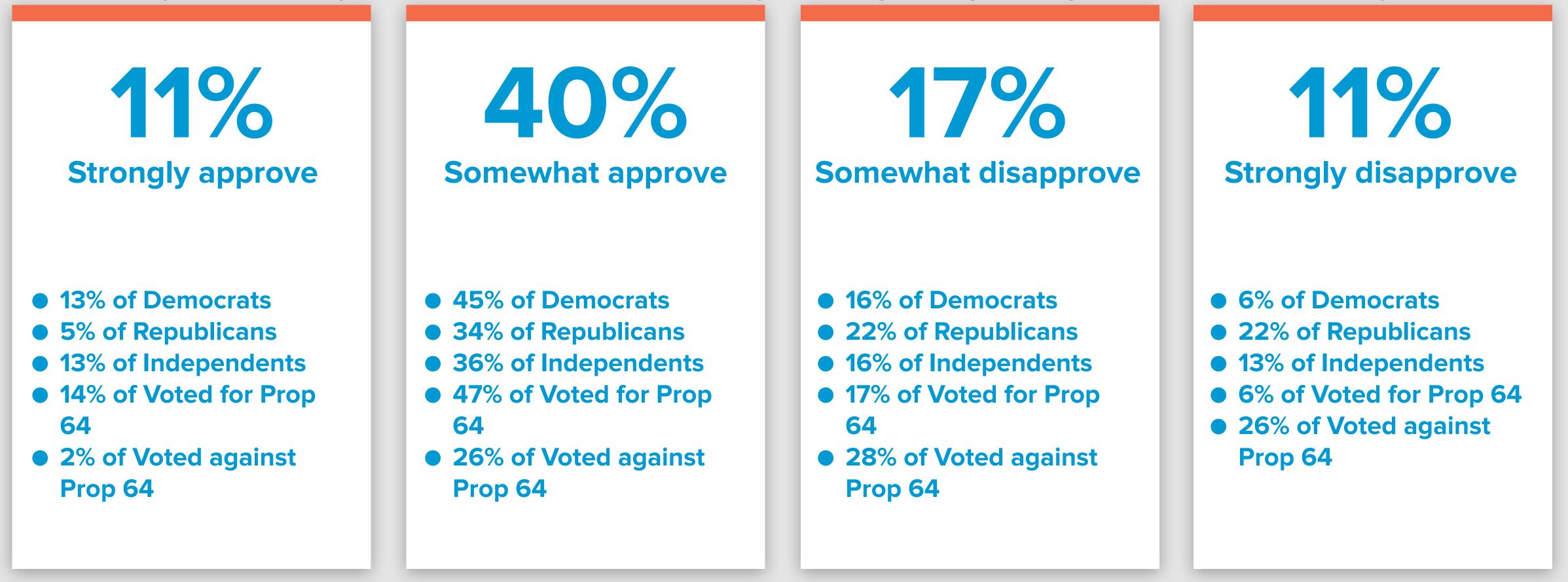


32% said Supporting cannabis farmers' innovation and growth. 31% said Treating cannabis as an agricultural commodity. 29% said Managing odor abatement. 23% said Providing local banking services and loans. 20% said Protecting the health and safety of workers. 14% said Restricting cannabis farms from growing and prospering. 13% said Training and retaining a local workforce.





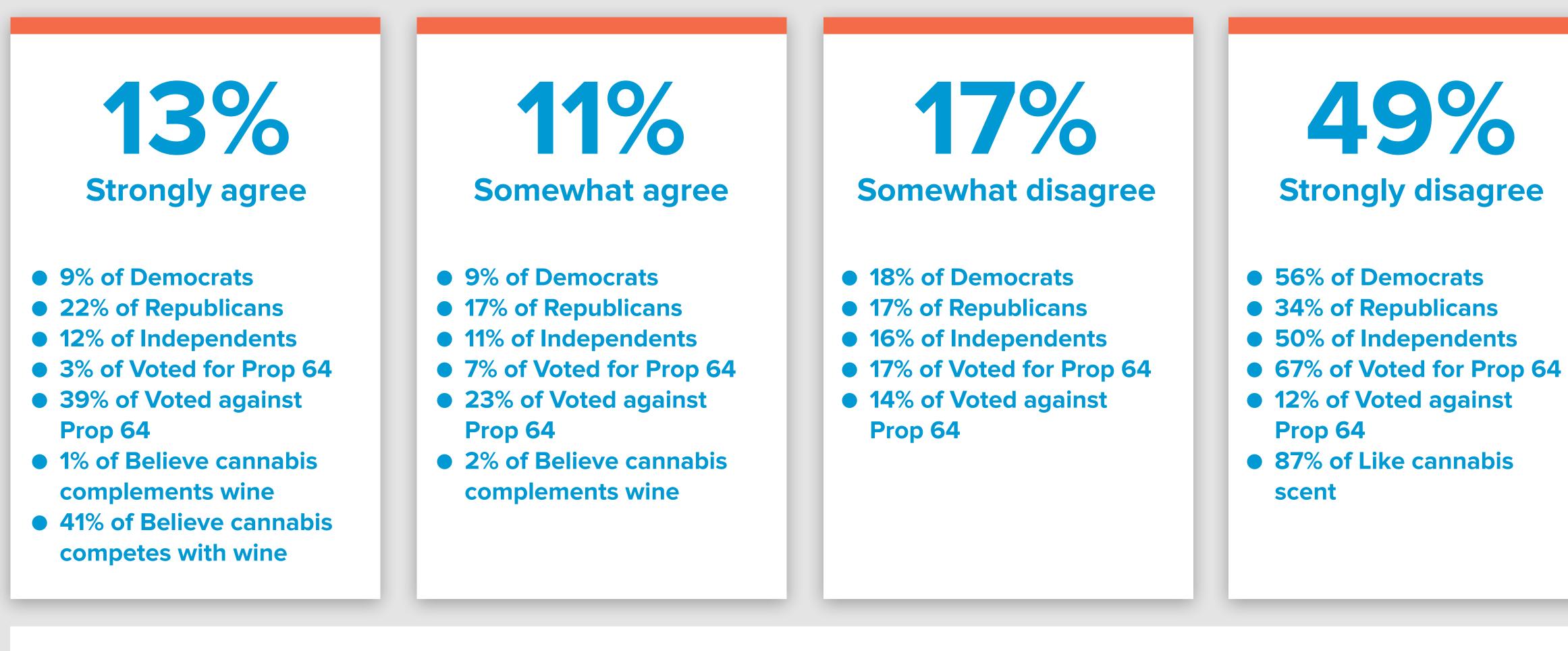
According to the Washington Post and New York Times, Santa Barbara County has become the most successful county in the state at regulating the cannabis cultivation and farming industry, producing millions of new tax and fee revenues for the county. How would you rate the job that Santa Barbara County is doing at regulating the cannabis industry?







Do you agree or disagree with the following statement: "The local cannabis industry hurts tourism and the wine tasting and vineyard industry."

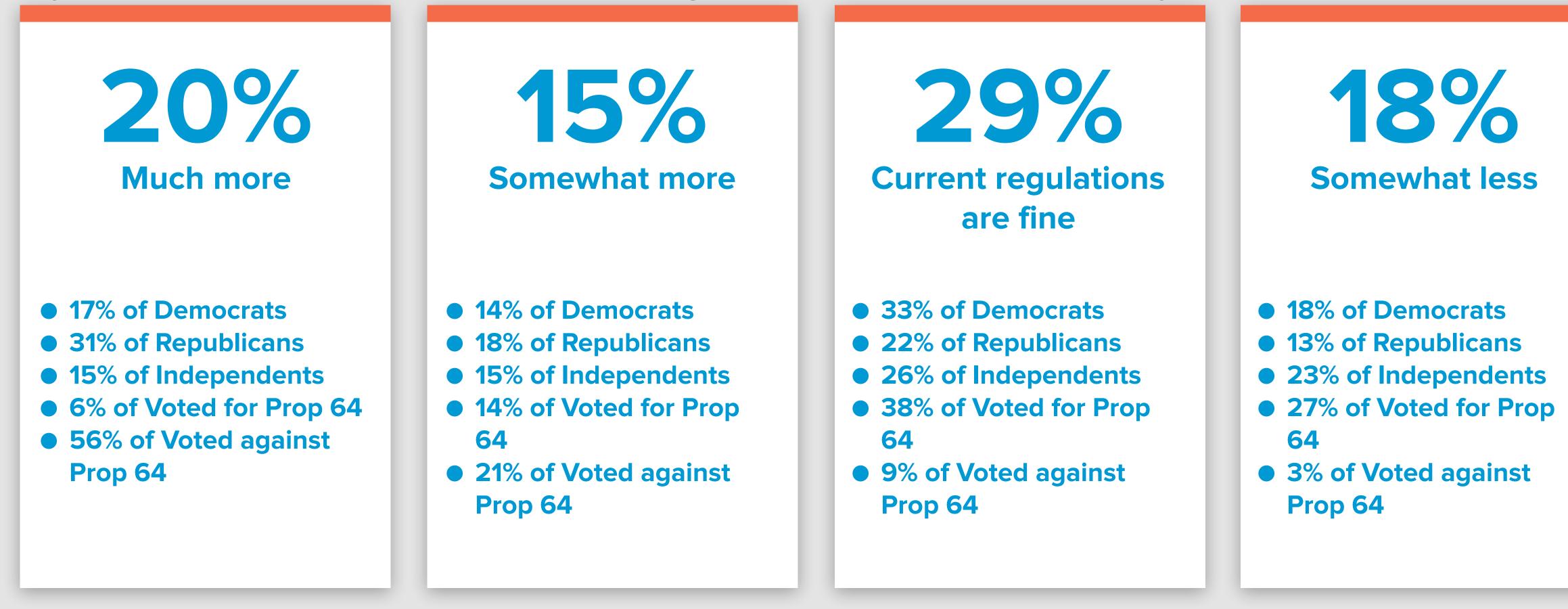






Similar to the agricultural industry, cannabis farmers must comply with strict local and state regulations related to production, processing, packaging and distribution. But it is still a new industry, though it is growing rapidly.

Do you believe there should be more or less regulation on the cannabis industry?

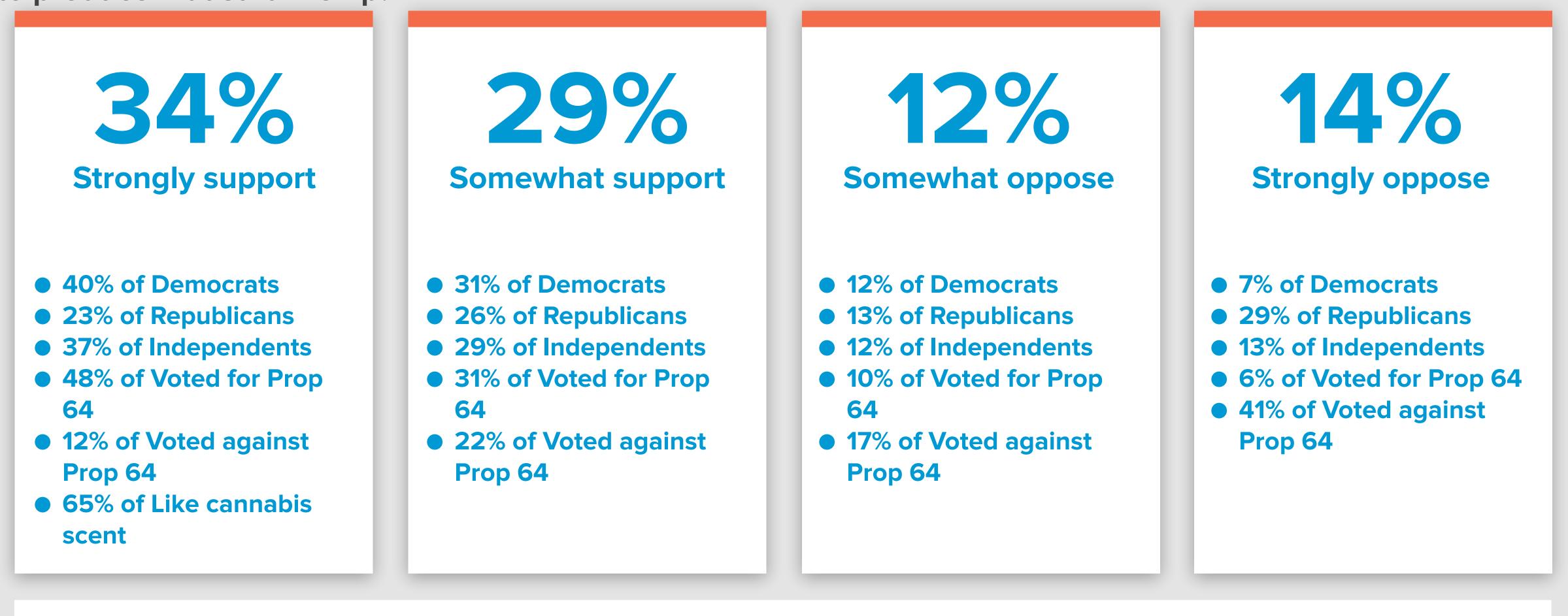


8% said Much less. 10% said Don't know / no opinion.



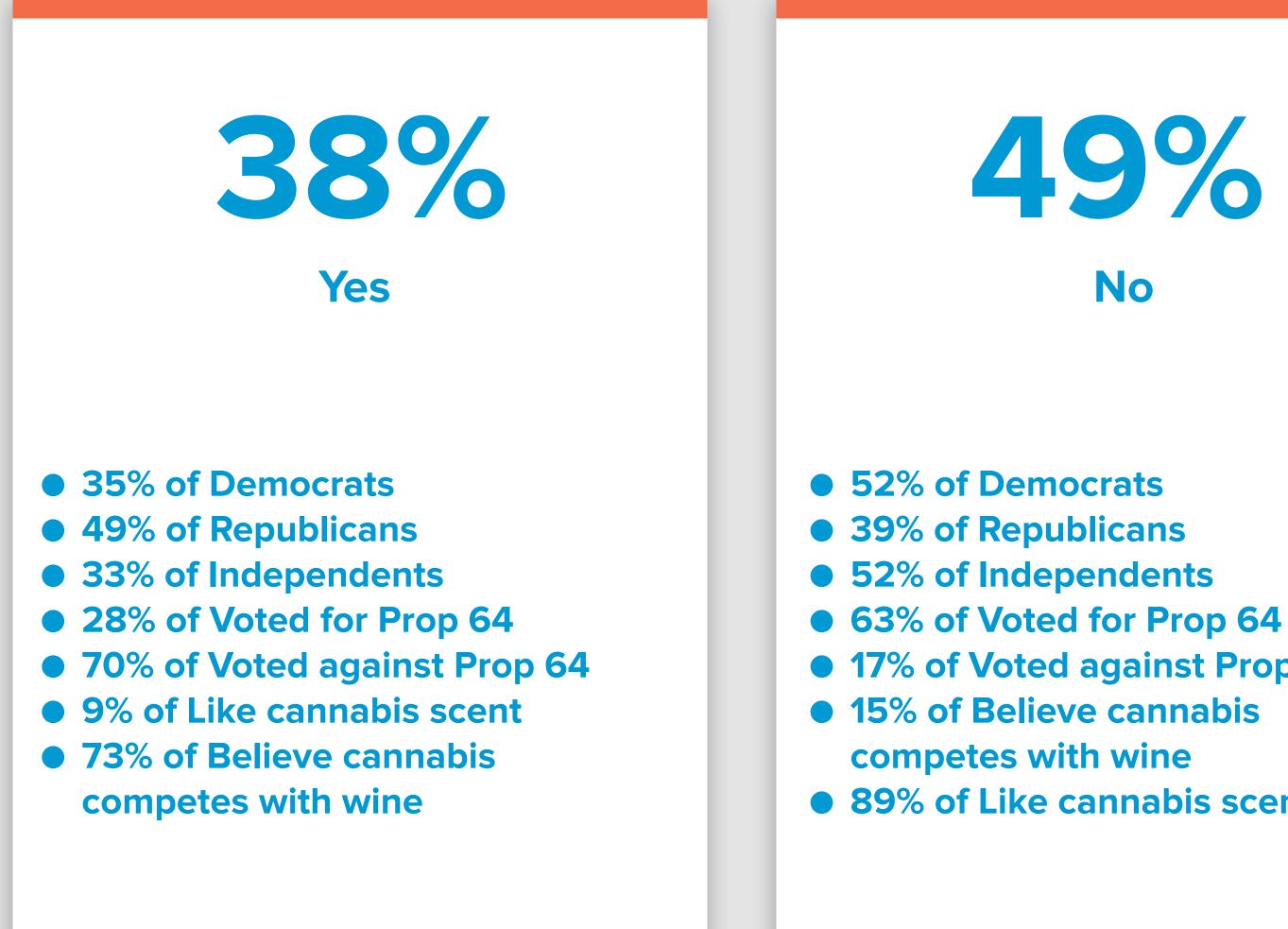


In 2019, the federal government legalized industrial hemp as an agricultural product, opening the opportunity for farming counties like Santa Barbara to enter this prospering market. Would you support or oppose the county encouraging and providing tax incentives to local farmers to produce industrial hemp?





Should local government restrict the cultivation of cannabis or industrial hemp on designated land zoned for farming and agriculture?





49% No

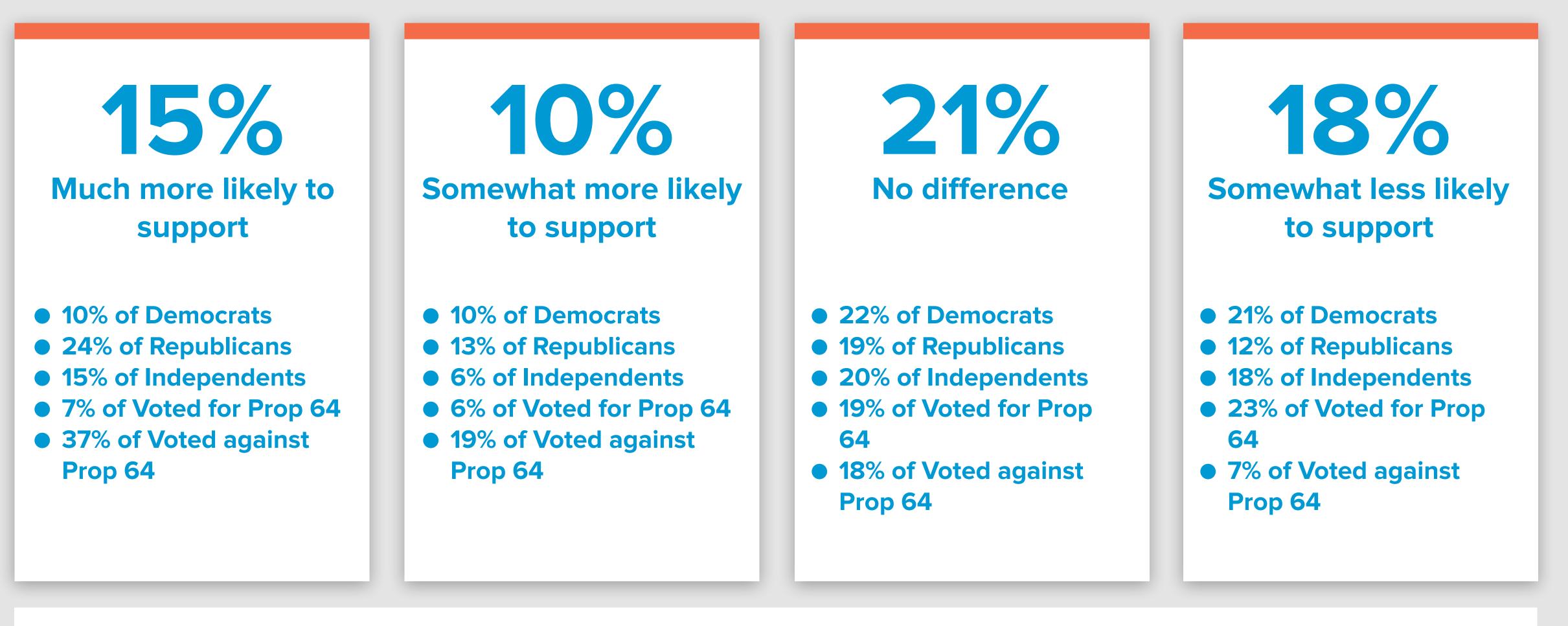
- 17% of Voted against Prop 64
- 89% of Like cannabis scent

13% Don't know

- 13% of Democrats
- 12% of Republicans
- 15% of Independents
- 9% of Voted for Prop 64
- 13% of Voted against Prop 64



If your County Supervisor opposes allowing cannabis cultivation to grow and prosper economically, will you be more or less likely to support him or her?

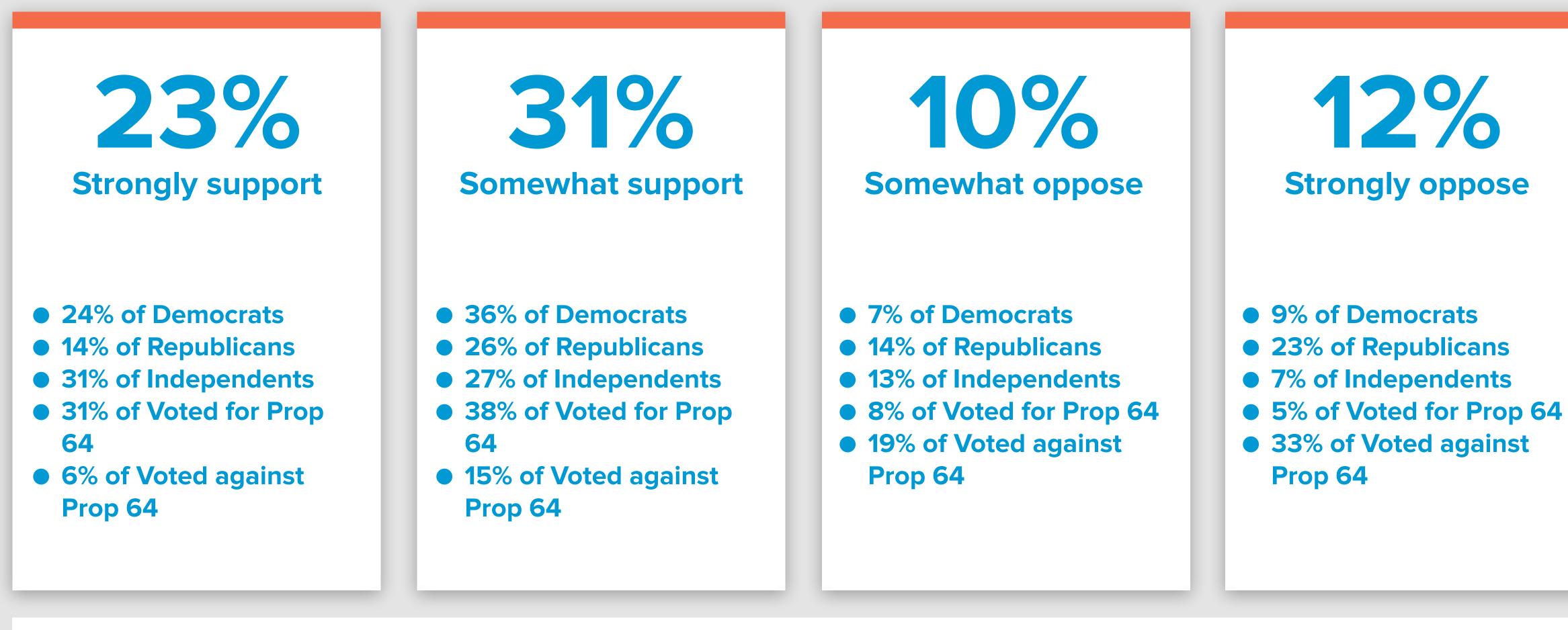




32% said Much less likely to support. 5% said Don't know / no opinion.



In order to deter the illegal black market for cannabis consumption and production, state lawmakers in Sacramento introduced AB 286, a bill to suspend the state cultivation tax of \$148 per pound and lower the excise tax from 15% to 11%. Do you support or oppose this bill?

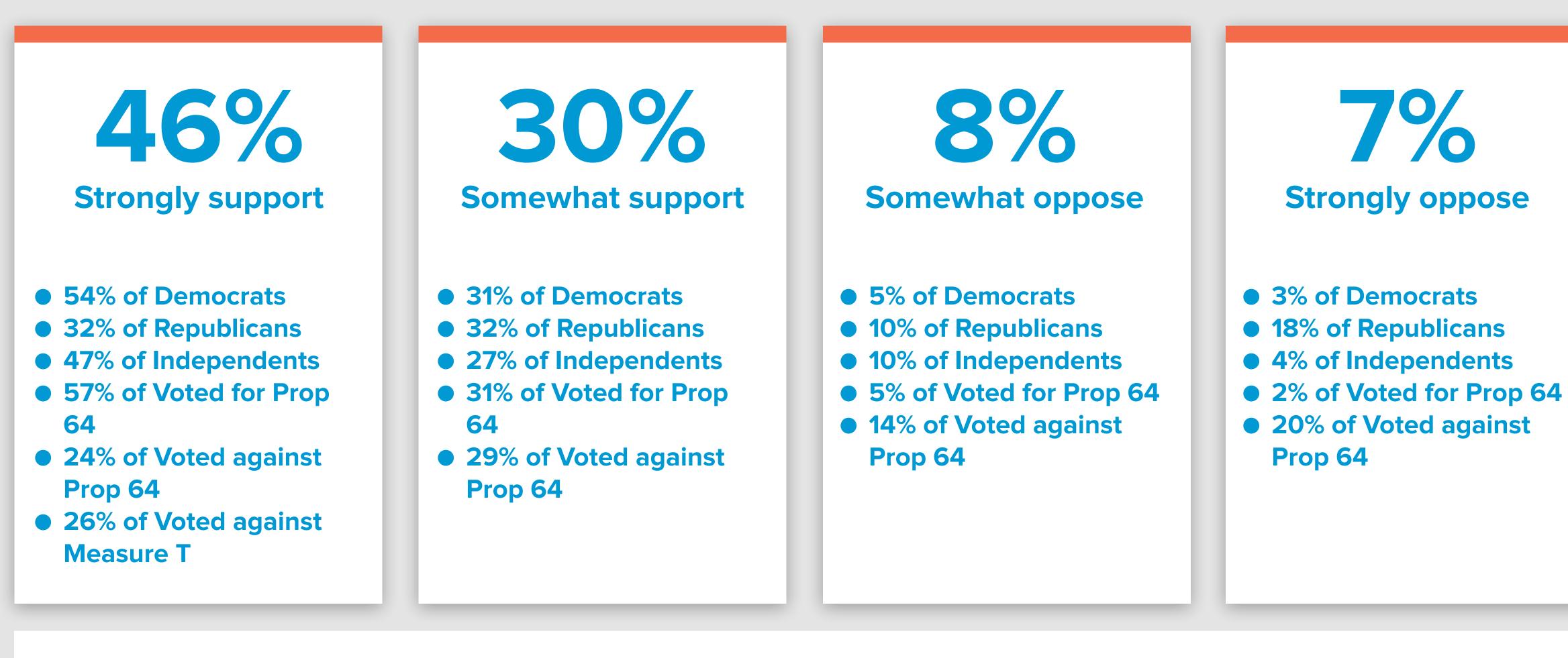








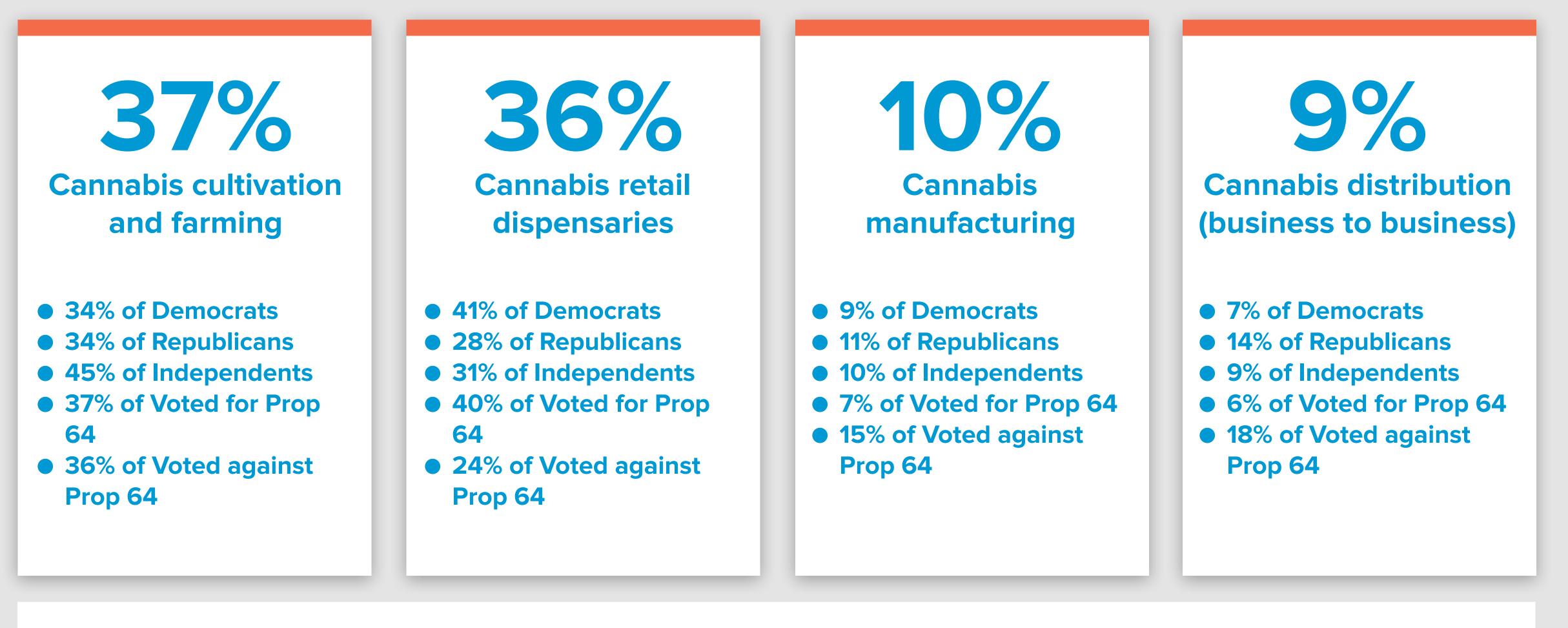
Given the competition from illegal businesses, would you support or oppose the county doing everything it can to sustain a viable licensed and regulated local cannabis industry?







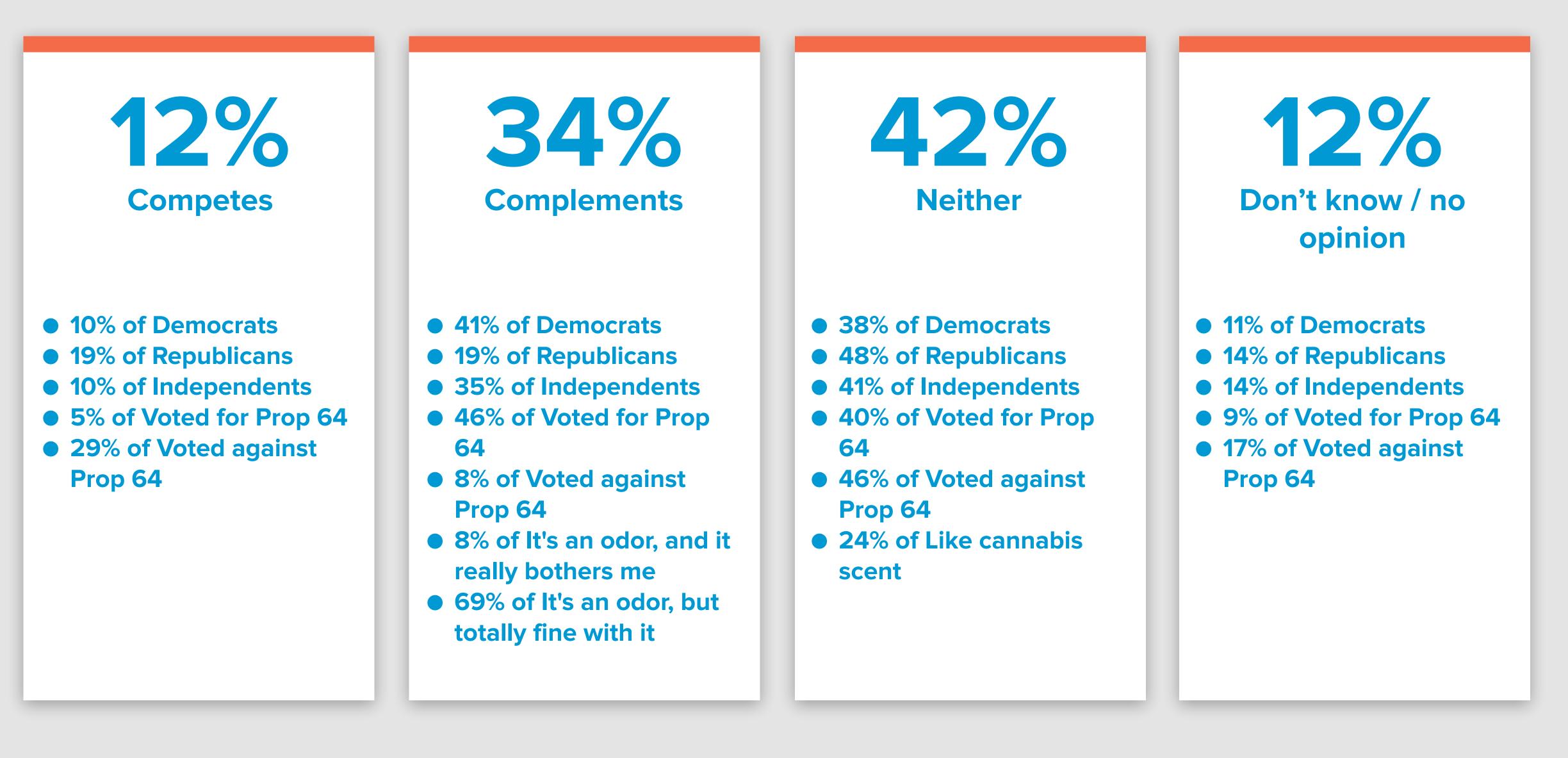
Which of the following should the county focus on to ensure the cannabis industry continues to experience economic growth?



9% said Cannabis home deliveries.

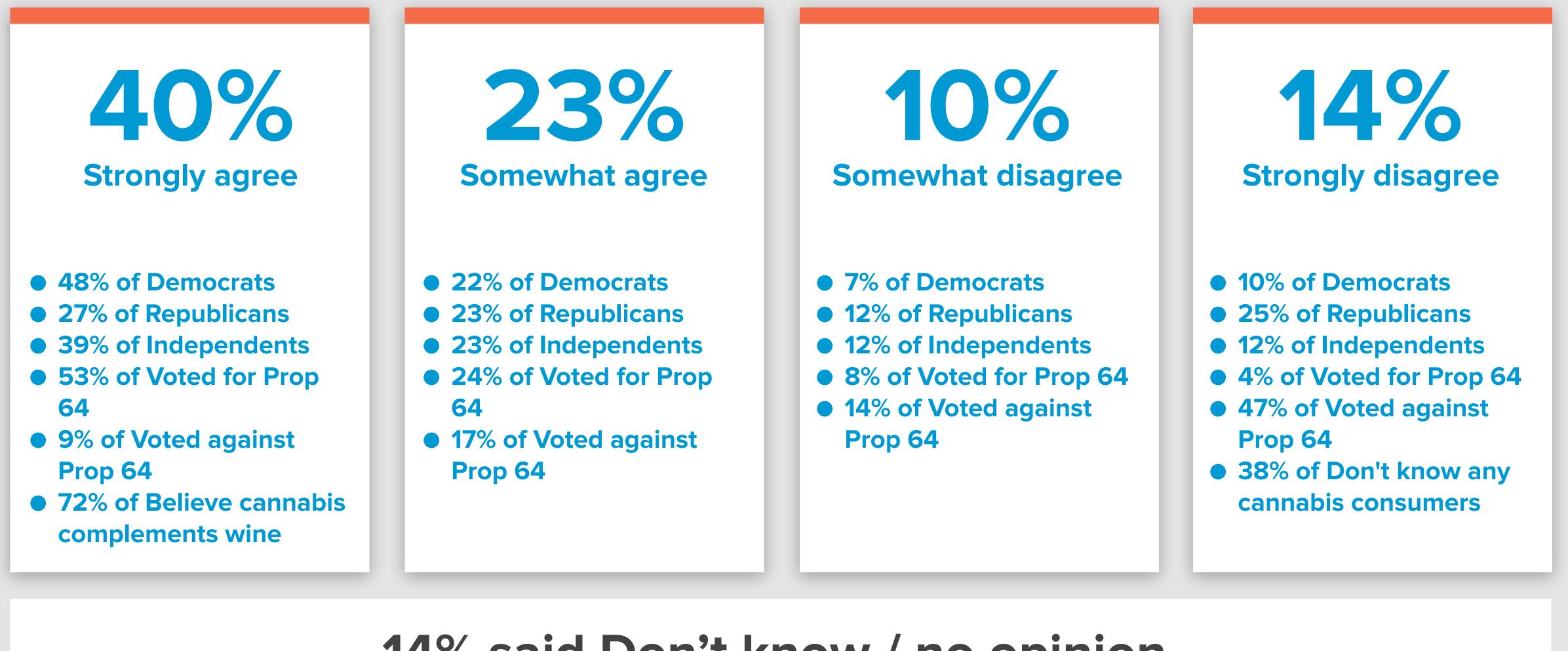


Do you believe the local cannabis industry competes with the wine industry or complements it?



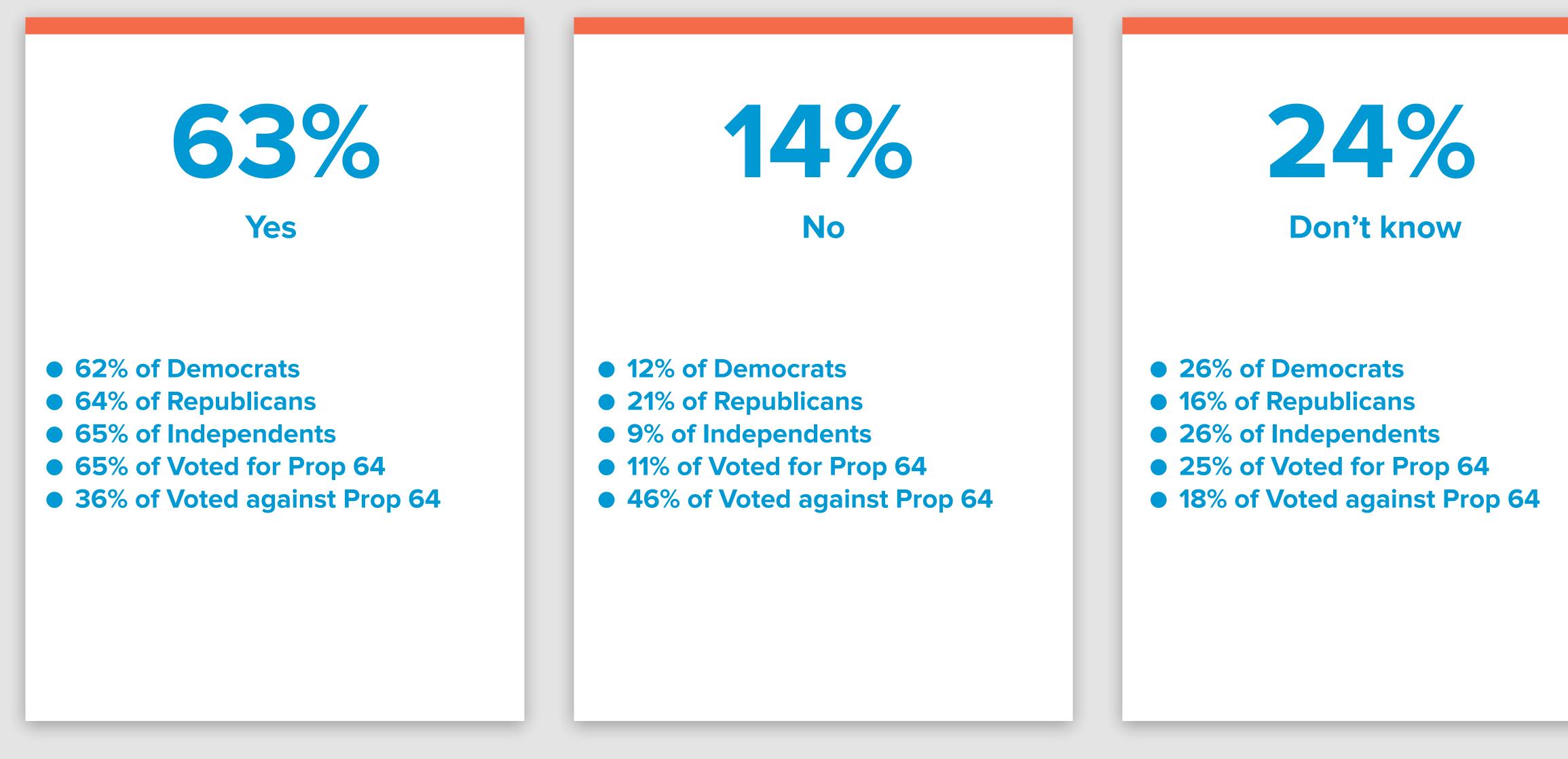


Do you agree that the local cannabis industry and the wine tasting and vineyard industry should work together to spur economic growth, create good paying jobs and contribute to the overall quality of life of the local community?





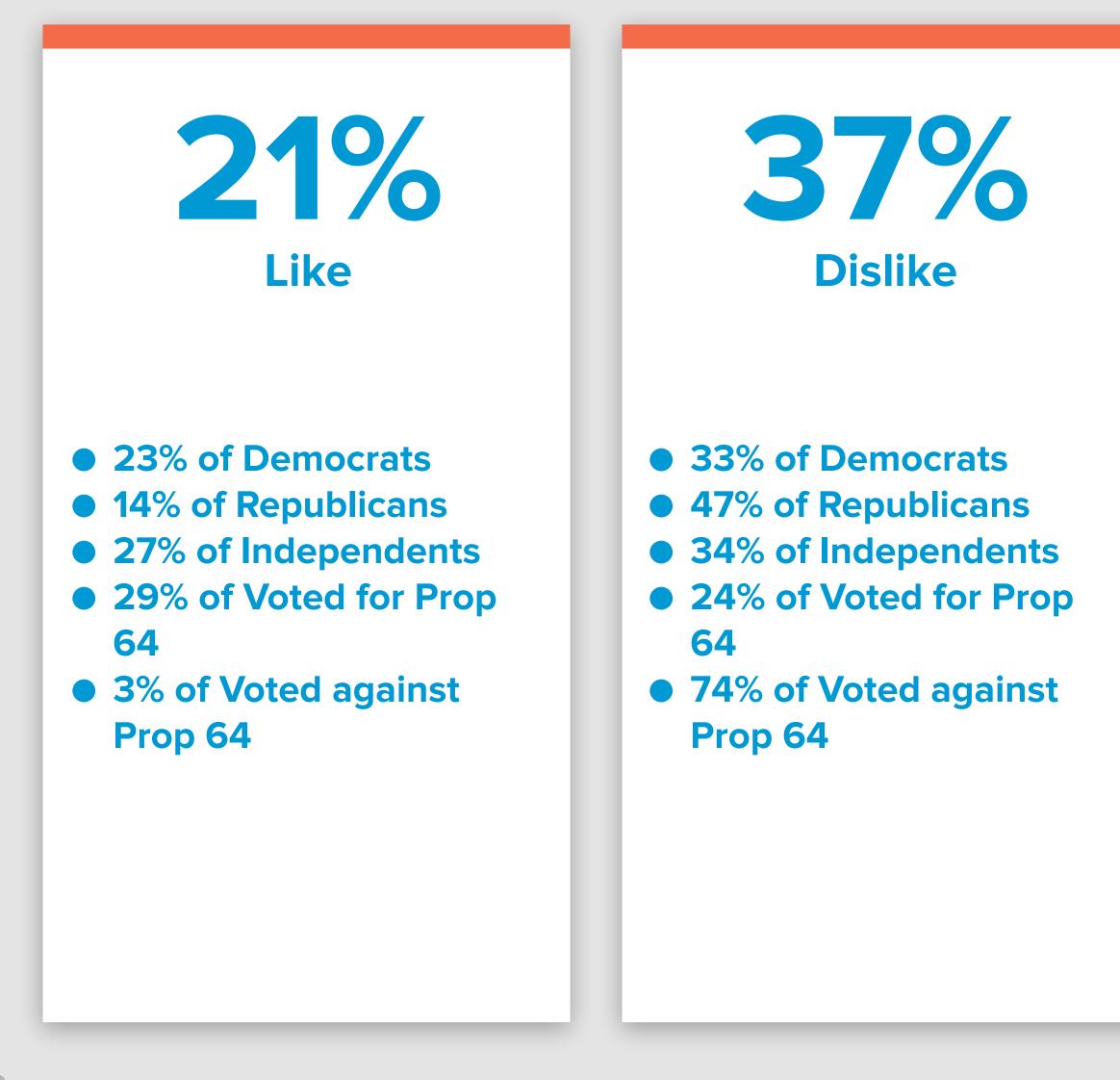
[If respond thinks the wine and cannabis industries should work together] Do you support cobranding and co-marketing among the local cannabis farmers and wine growers to help grow the economy and produce good paying jobs?







The cannabis plant, like other agricultural plants, releases a unique scent when flowering. Do you like or dislike the scent?

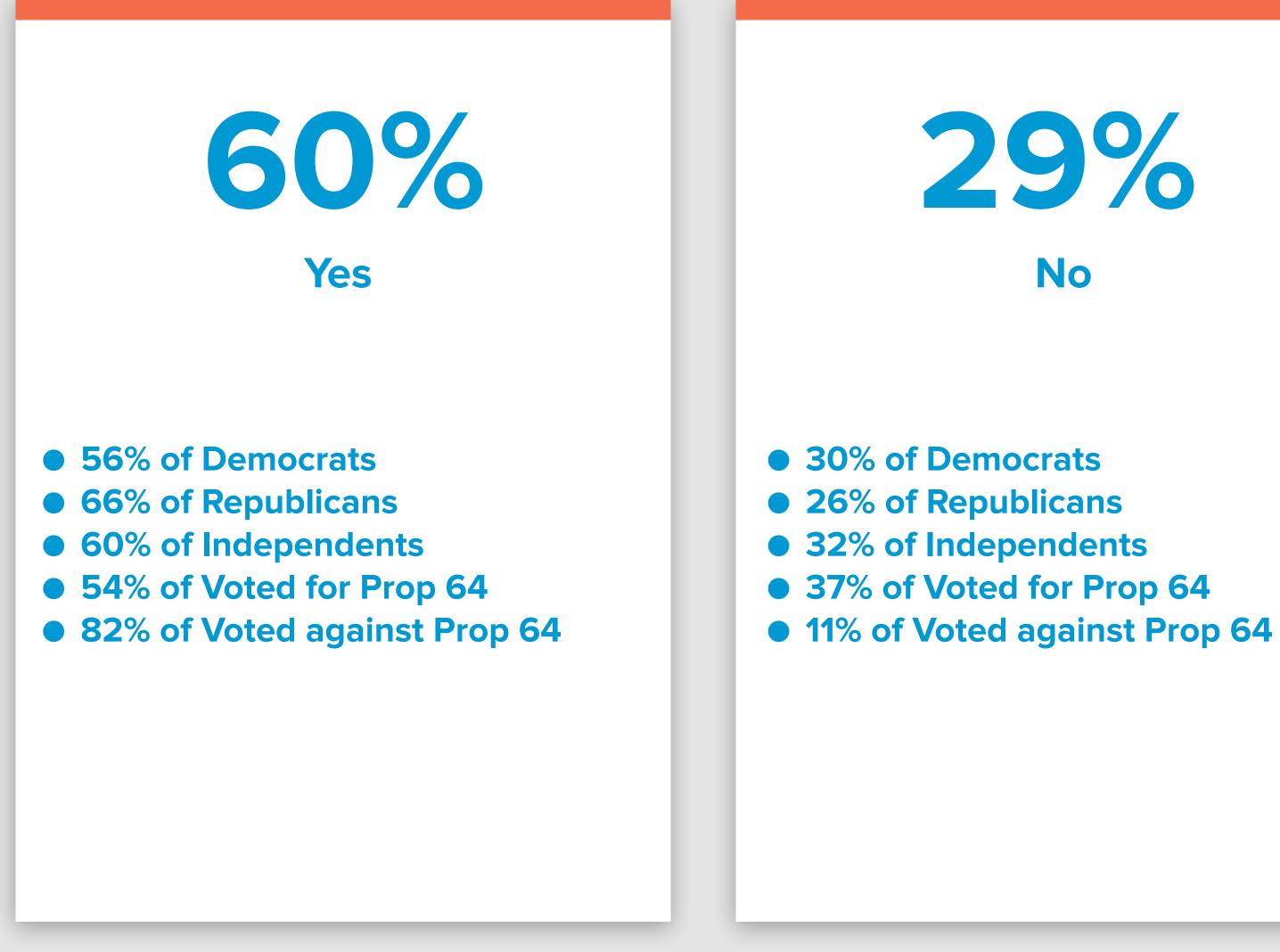




31% Neutral	11% Don't know / no opinion
<list-item><list-item><list-item><list-item><list-item></list-item></list-item></list-item></list-item></list-item>	 14% of Democrats 9% of Republicans 7% of Independents 9% of Voted for Prop 64 9% of Voted against Prop 64



Do you consider the cannabis scent to be an odor?





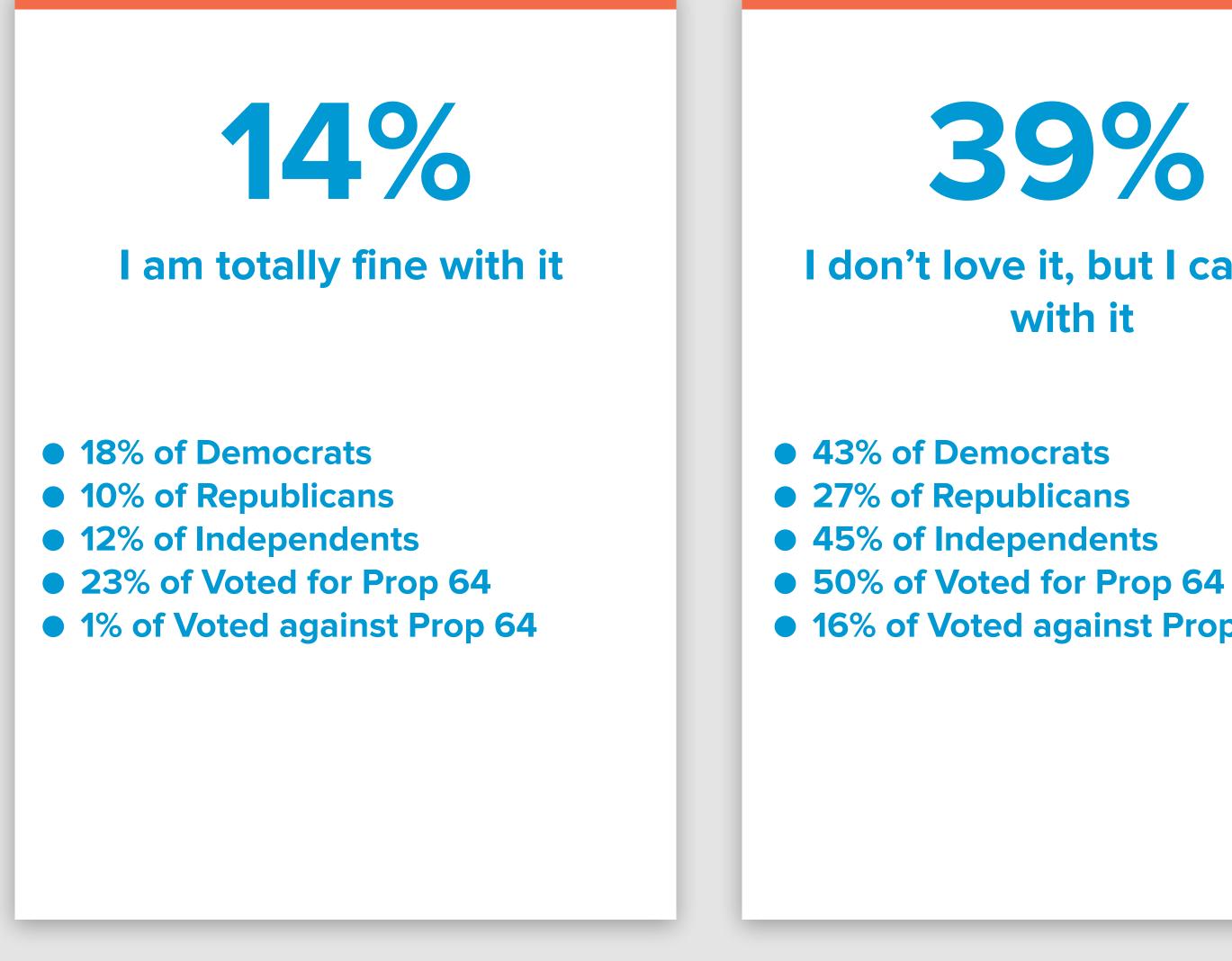
29% No

11% Don't know

- 14% of Democrats
- 8% of Republicans
- 8% of Independents
- 9% of Voted for Prop 64
- 7% of Voted against Prop 64



[If respondent considers it to be an odor] Which of the following best matches how you feel about the odor from cannabis?





39%

I don't love it, but I can live with it

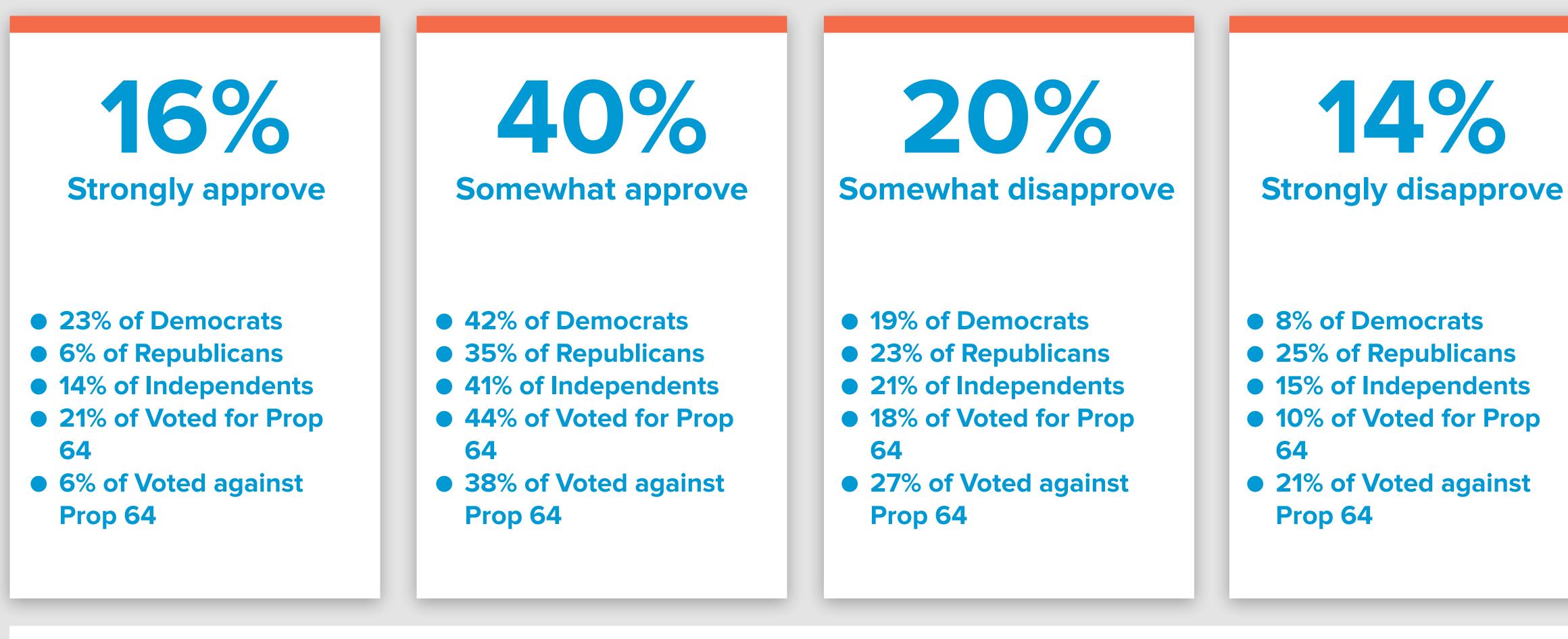
• 16% of Voted against Prop 64

47% It really bothers me

- 39% of Democrats
- 63% of Republicans
- 43% of Independents
- 27% of Voted for Prop 64
- 84% of Voted against Prop 64



Protecting the environment - How would you rate the job that the Santa Barbara County Board of Supervisors is doing addressing each of the following issues?

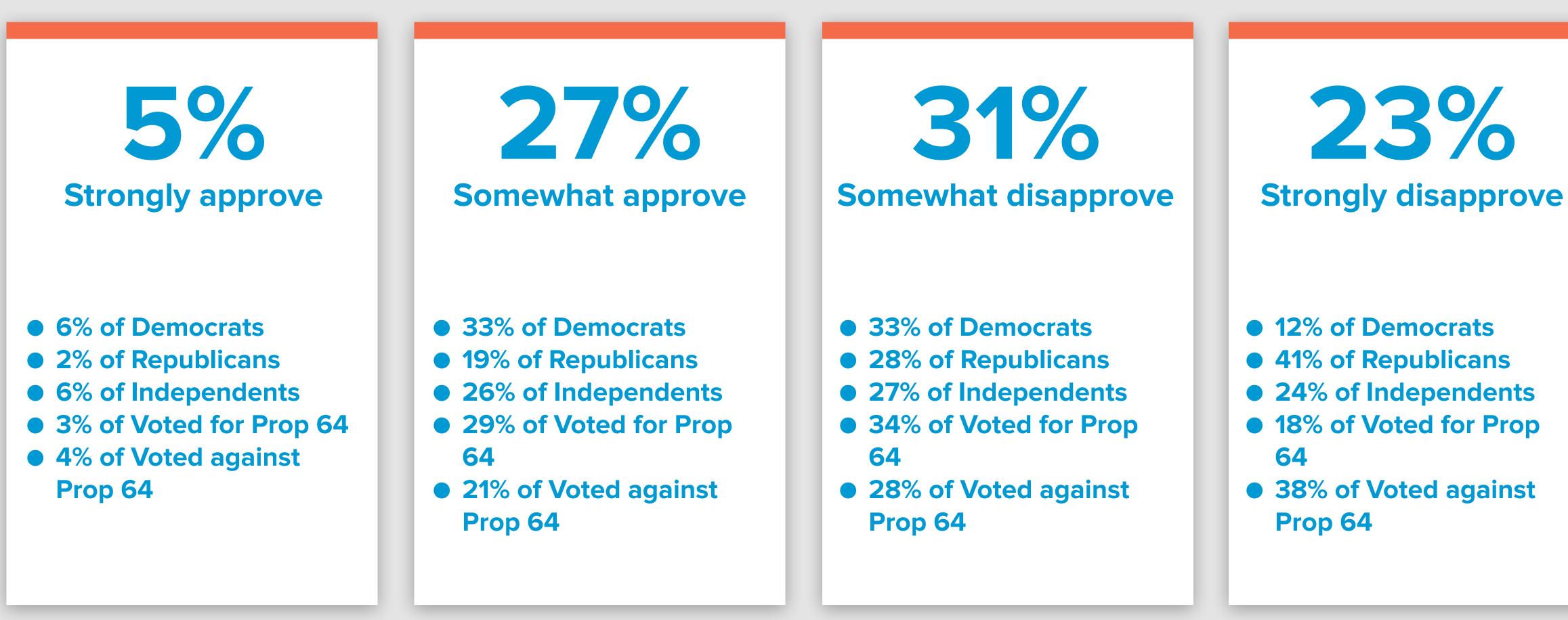








Economic growth and job creation - How would you rate the job that the Santa Barbara County Board of Supervisors is doing addressing each of the following issues?

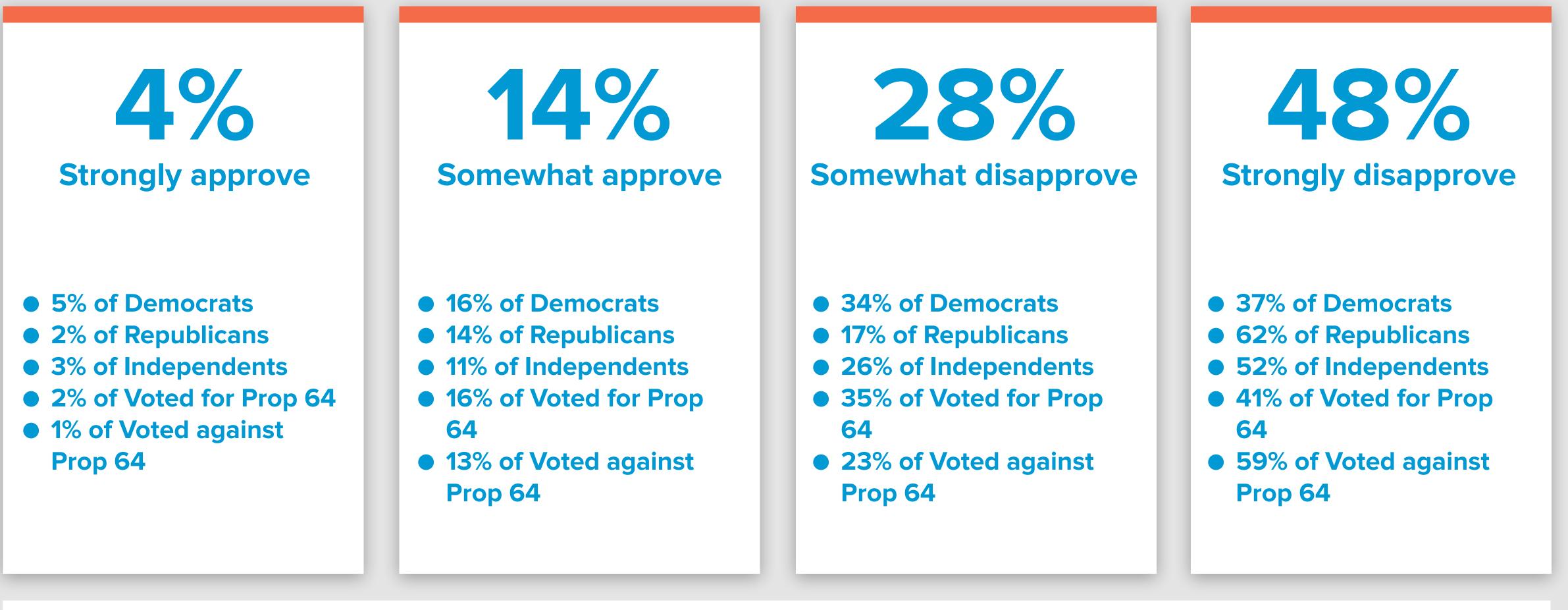








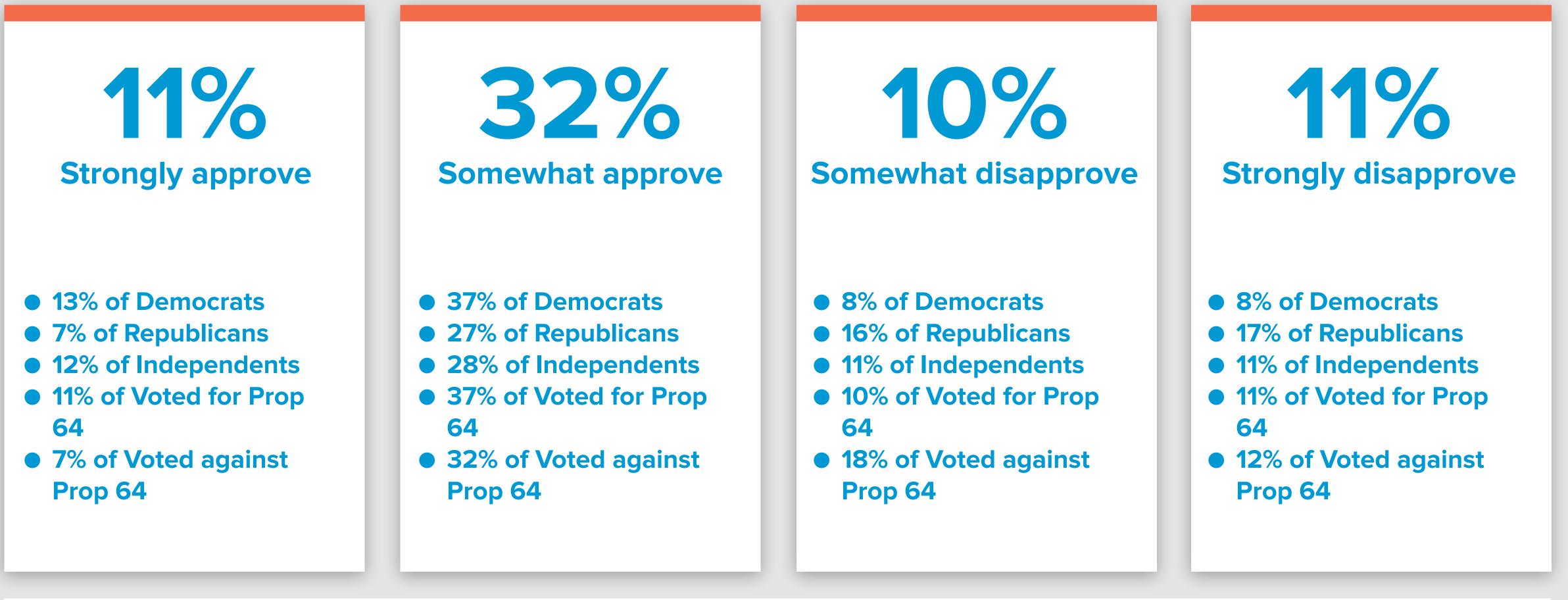
Homelessness - How would you rate the job that the Santa Barbara County Board of Supervisors is doing addressing each of the following issues?







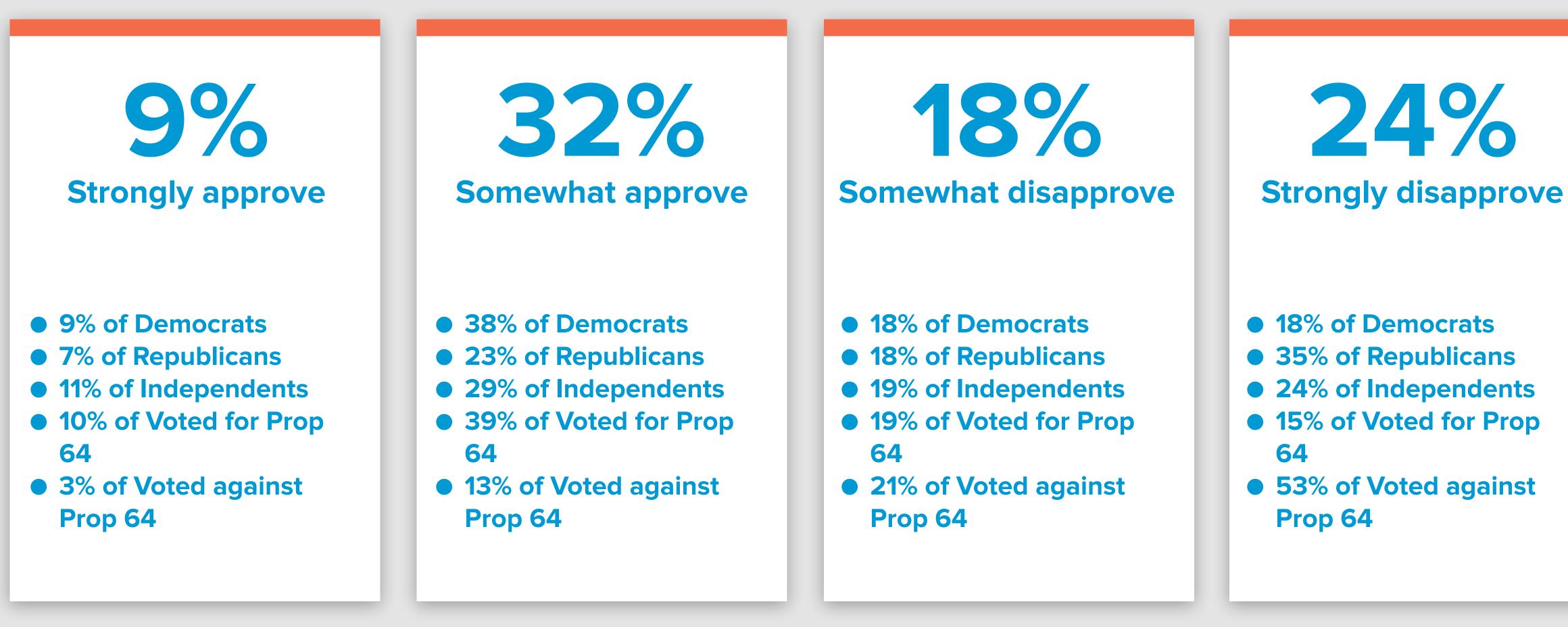
Regulating the wine industry - How would you rate the job that the Santa Barbara County Board of Supervisors is doing addressing each of the following issues?







Regulating the cannabis industry - How would you rate the job that the Santa Barbara County Board of Supervisors is doing addressing each of the following issues?

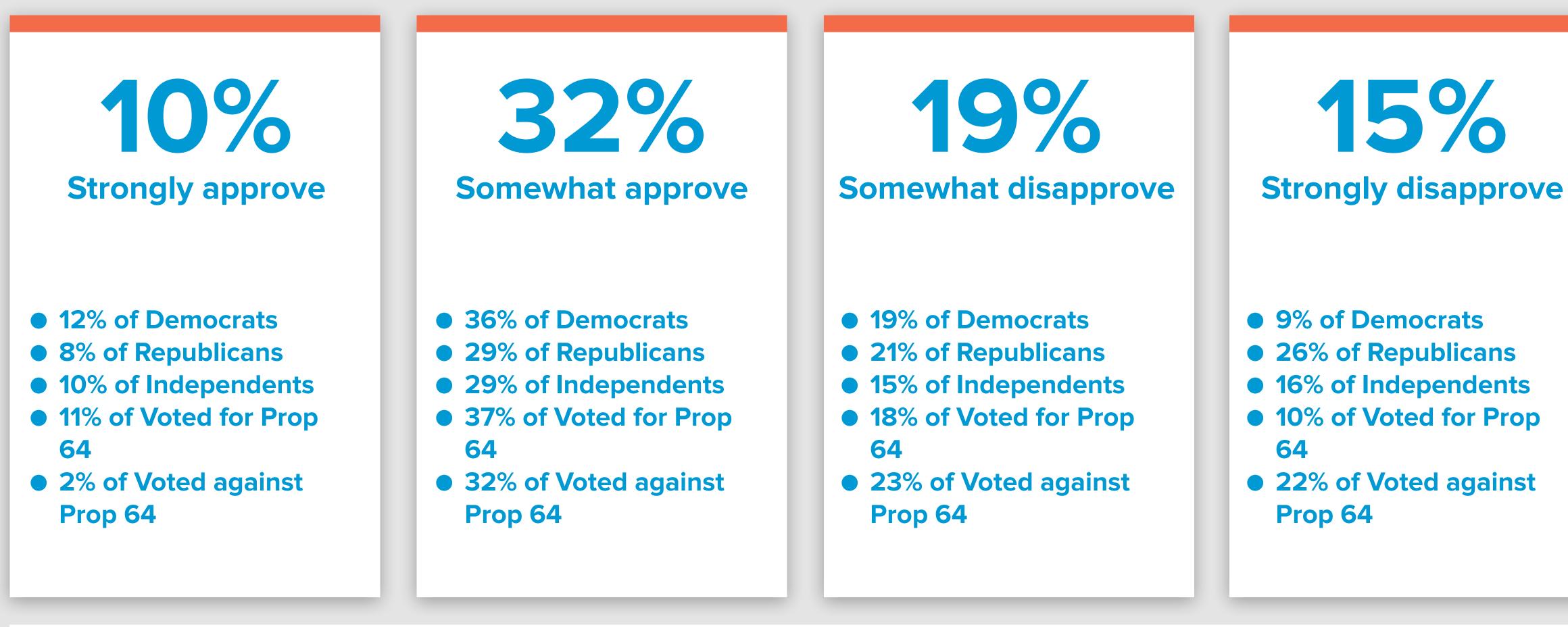








Regulating the agricultural and farming industry - How would you rate the job that the Santa Barbara County Board of Supervisors is doing addressing each of the following issues?

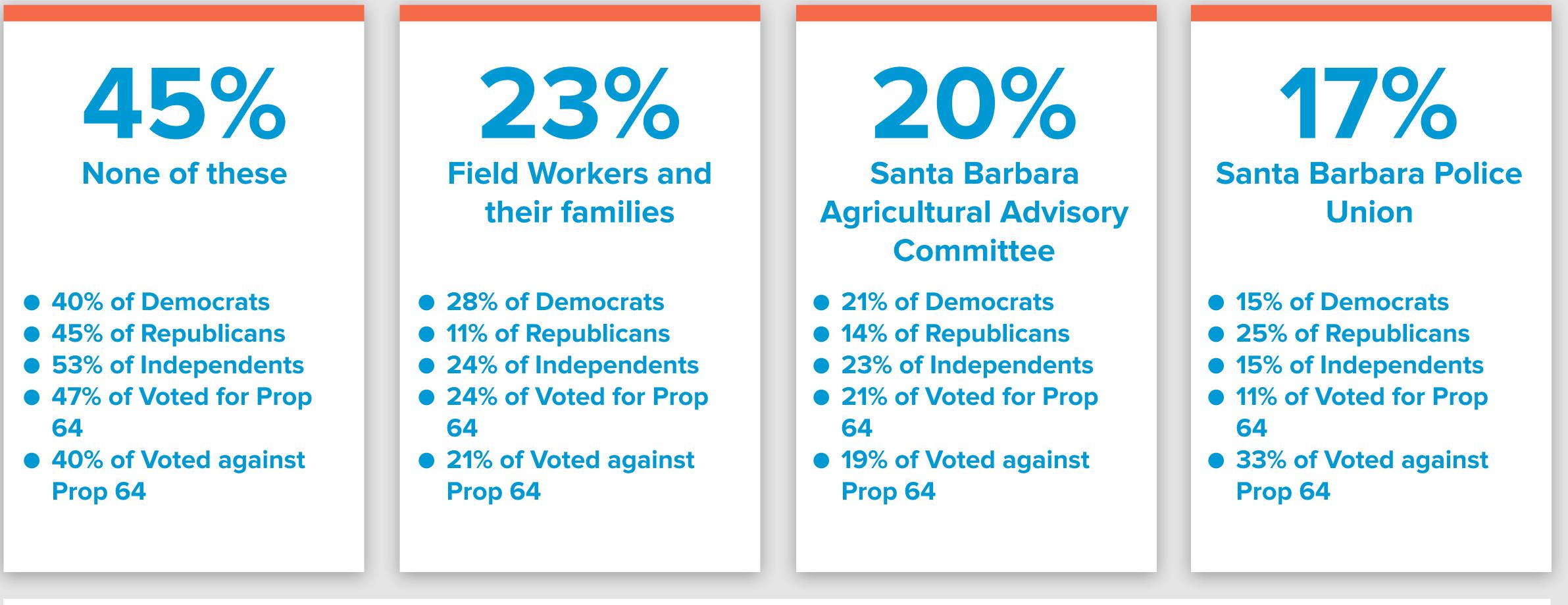








Of the following groups, whose positions do you seriously consider when you're forming your own positions on legislation, policy or regulation affecting the county? Select all that apply.



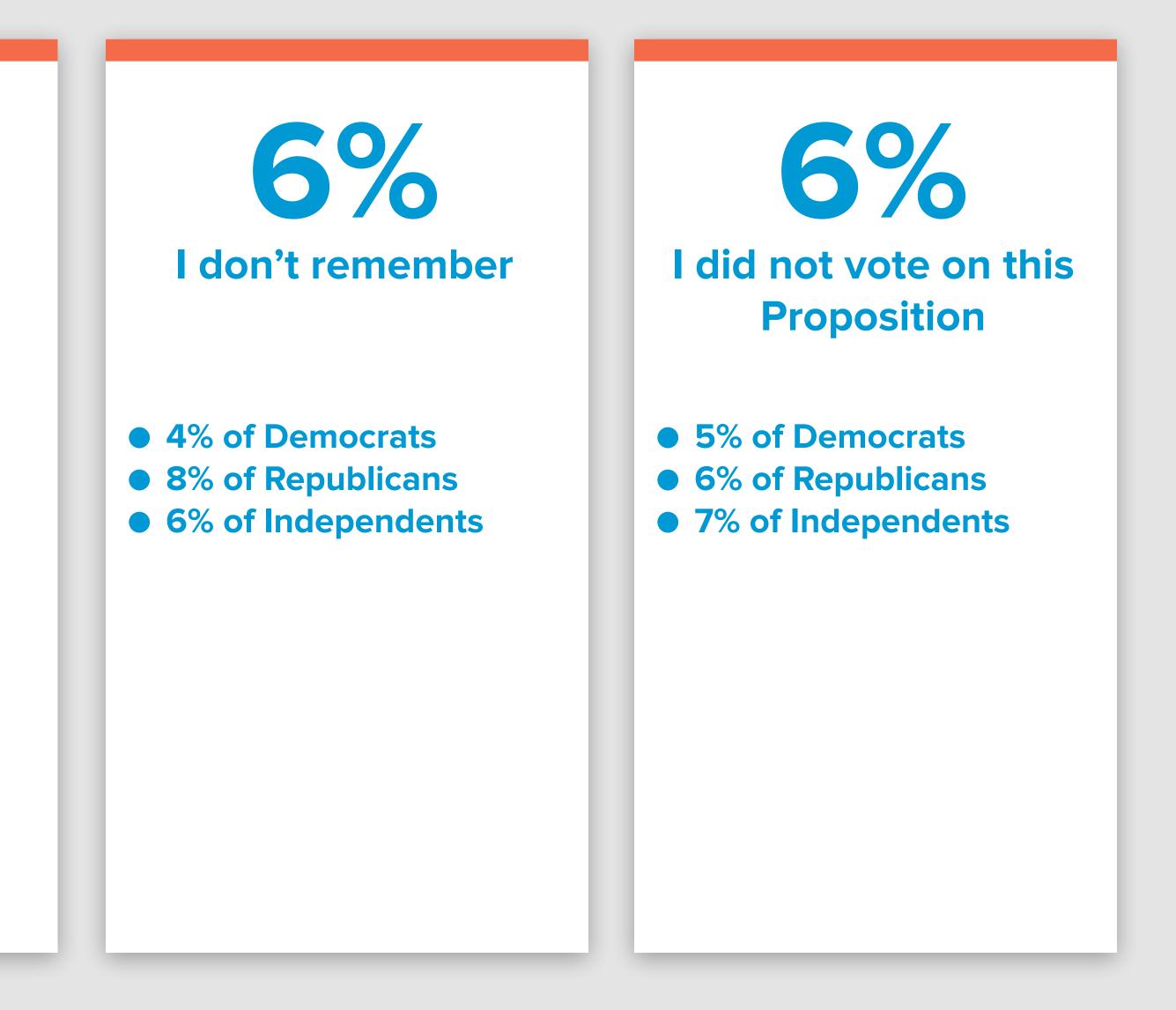
17% said Santa Barbara Cannabis Farmers and Industry Leaders. 17% said Santa Barbara Fire Fighters Union. 17% said Santa Barbara Cannabis and Wine Growers Alliance. 15% said The Farm Bureau. 14% said Cannabis Business Council of Santa Barbara. 12% said Santa Barbara County Public Employees. 12% said Lompoc Valley Cannabis Association. 11% said Santa Barbara Business and Industry Suppliers. 10% said Santa Barbara Vintners Association. 8% said CARP Growers. 6% said Concerned Carpinterians. 4% said We Watch.



In 2016, Proposition 64 was passed in California, legalizing adult use cannabis. How did you vote on this Proposition?

65%	24%
I voted for it	Lvoted against it
 97% of Democrats 42% of Republicans 67% of Independents 	<list-item><list-item><list-item></list-item></list-item></list-item>





In 2018, how did you vote on Measure T, known as the Marijuana Operations General Tax?

41% I voted for it

- 45% of Democrats
- 37% of Republicans
- 36% of Independents
- 48% of Voted for Prop 64
- 34% of Voted against Prop 64

14% I voted against it

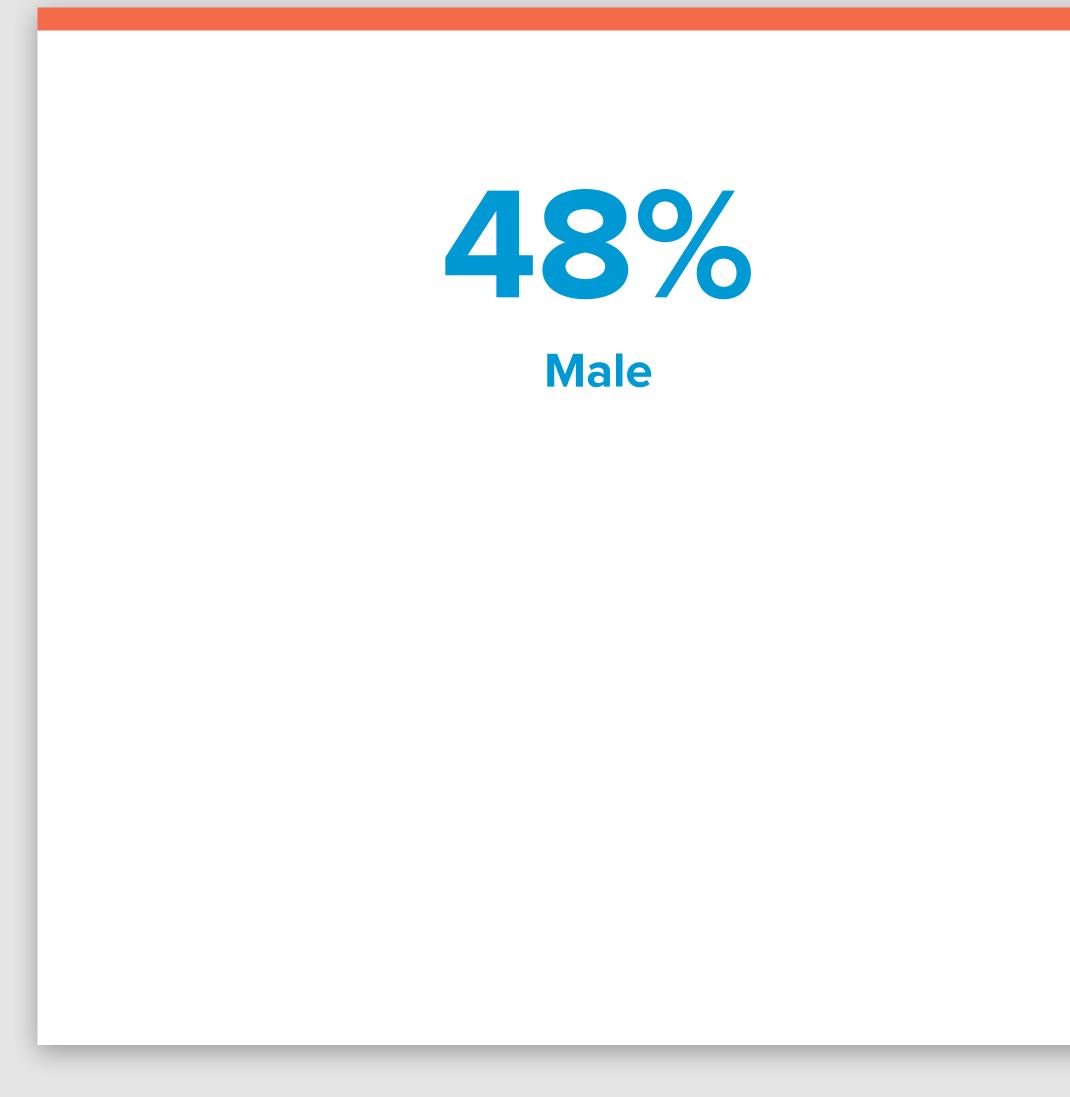
- 10% of Democrats
- 24% of Republicans
- 12% of Independents
- 12% of Voted for Prop
 64
- 24% of Voted against Prop 64



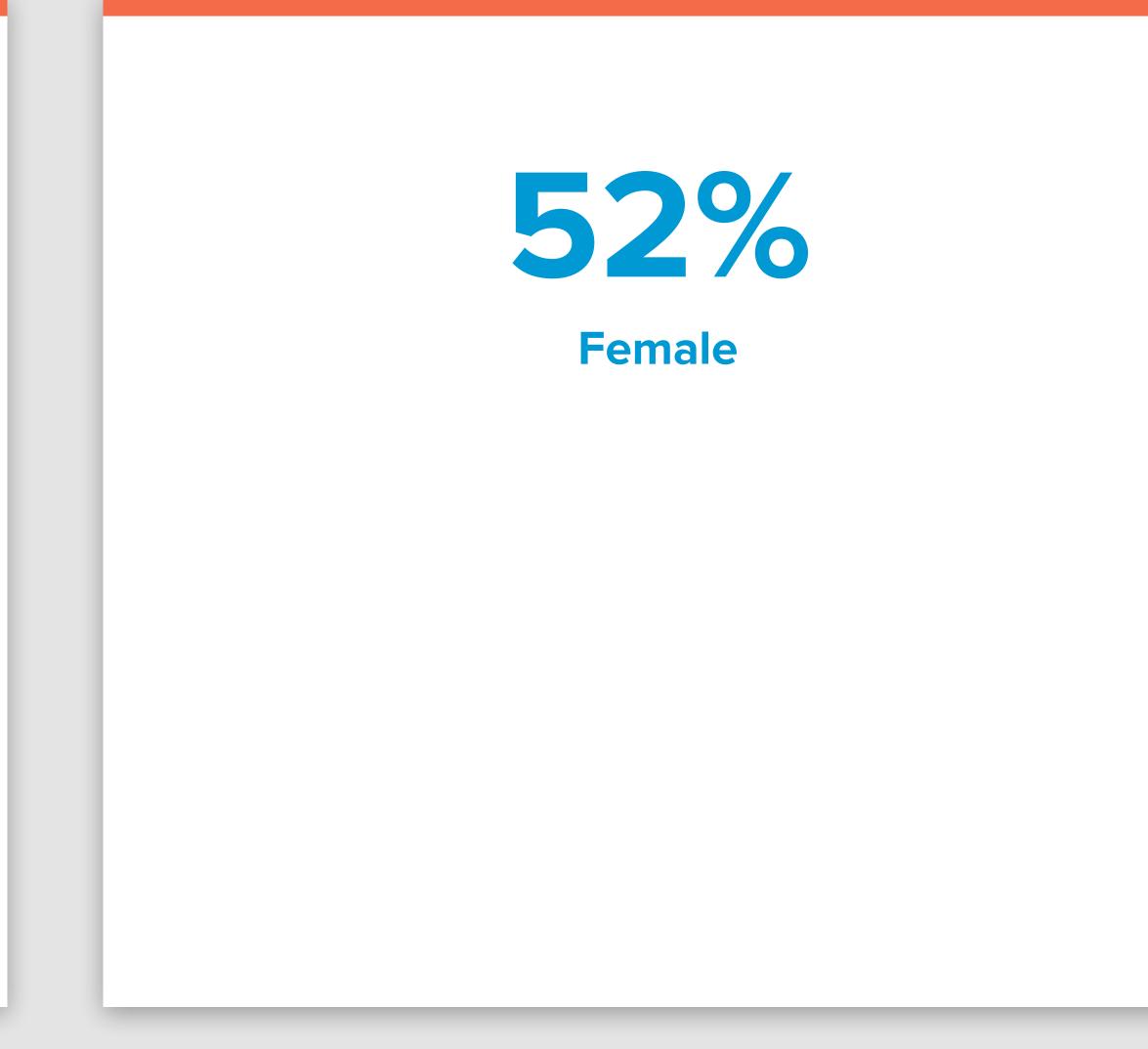
35% I don't remember	11% I did not vote on this Proposition
 36% of Democrats 28% of Republicans 39% of Independents 34% of Voted for Prop 64 32% of Voted against Prop 64 	<list-item></list-item>







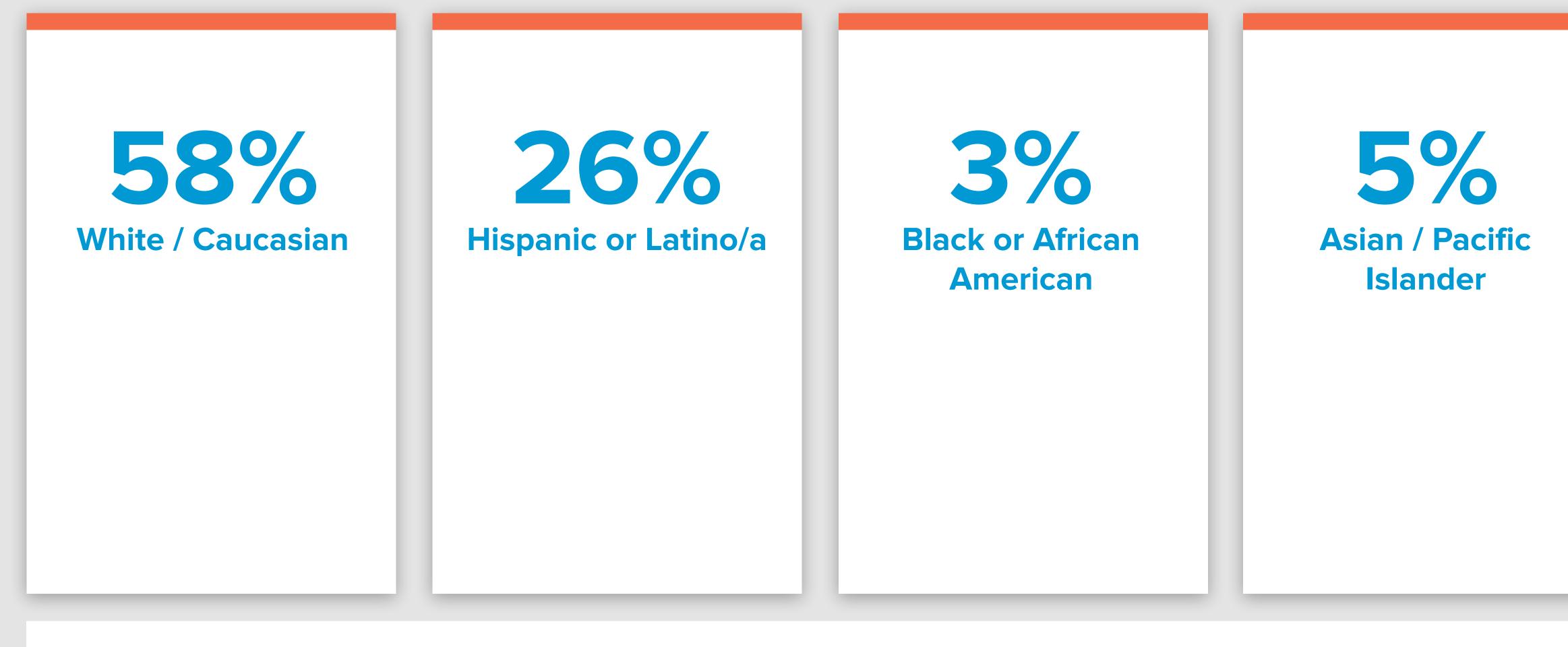








Ethnicity



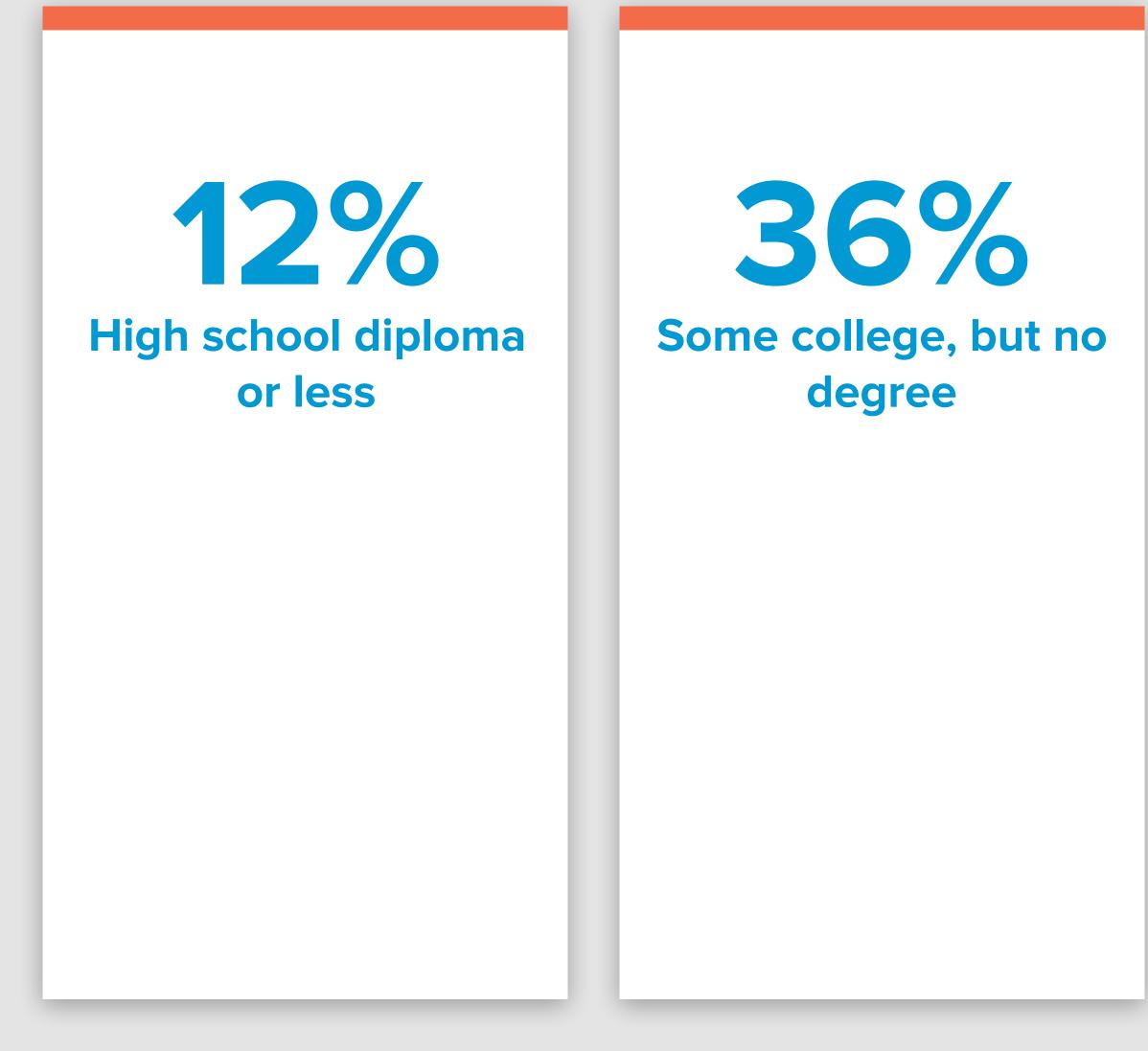
1% said American Indian or Alaska Native. 7% said Other.







Educational Attainment



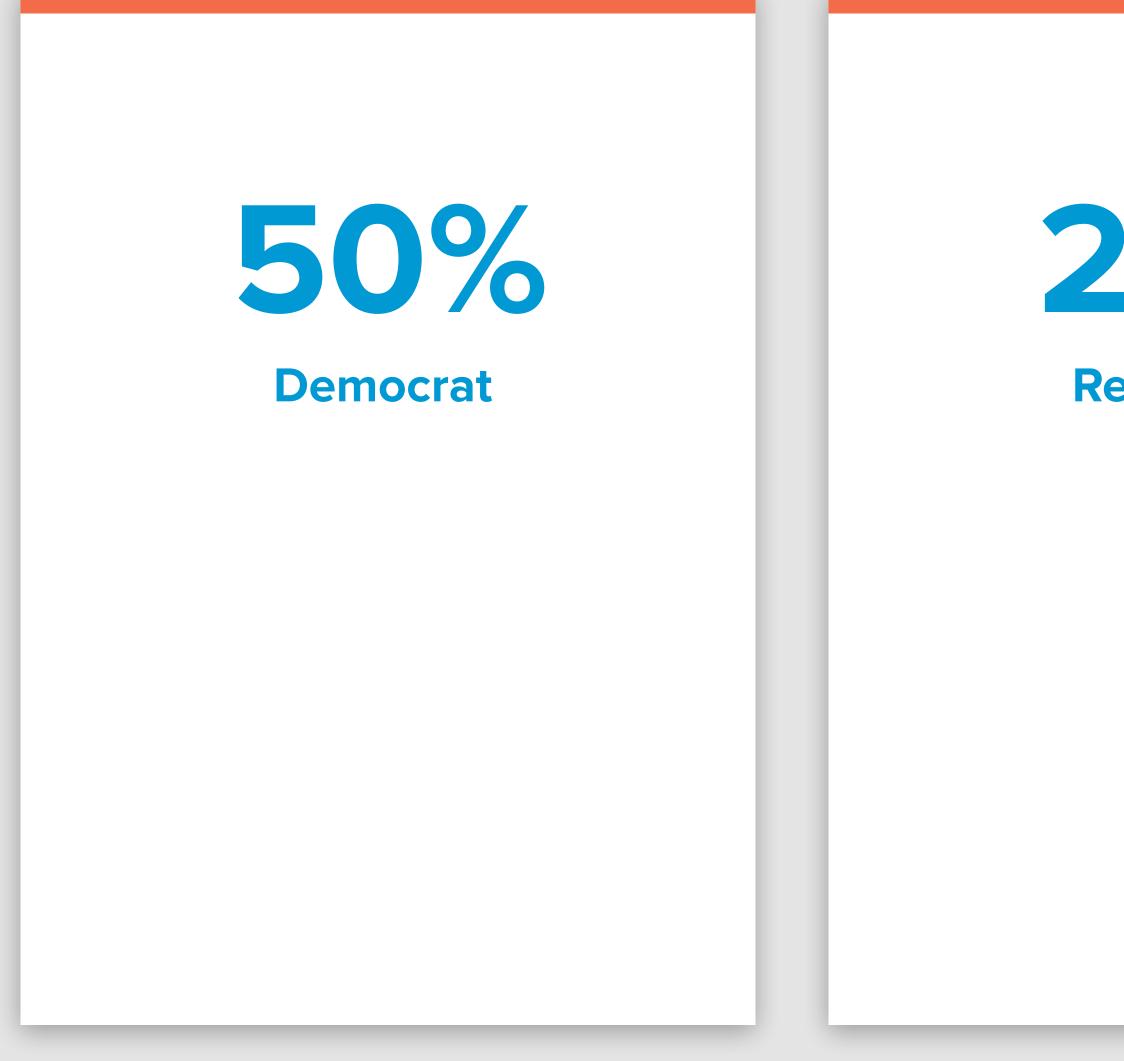


34% Bachelor's degree, or four-year college degree

19% Graduate degree



Party Registration





27%

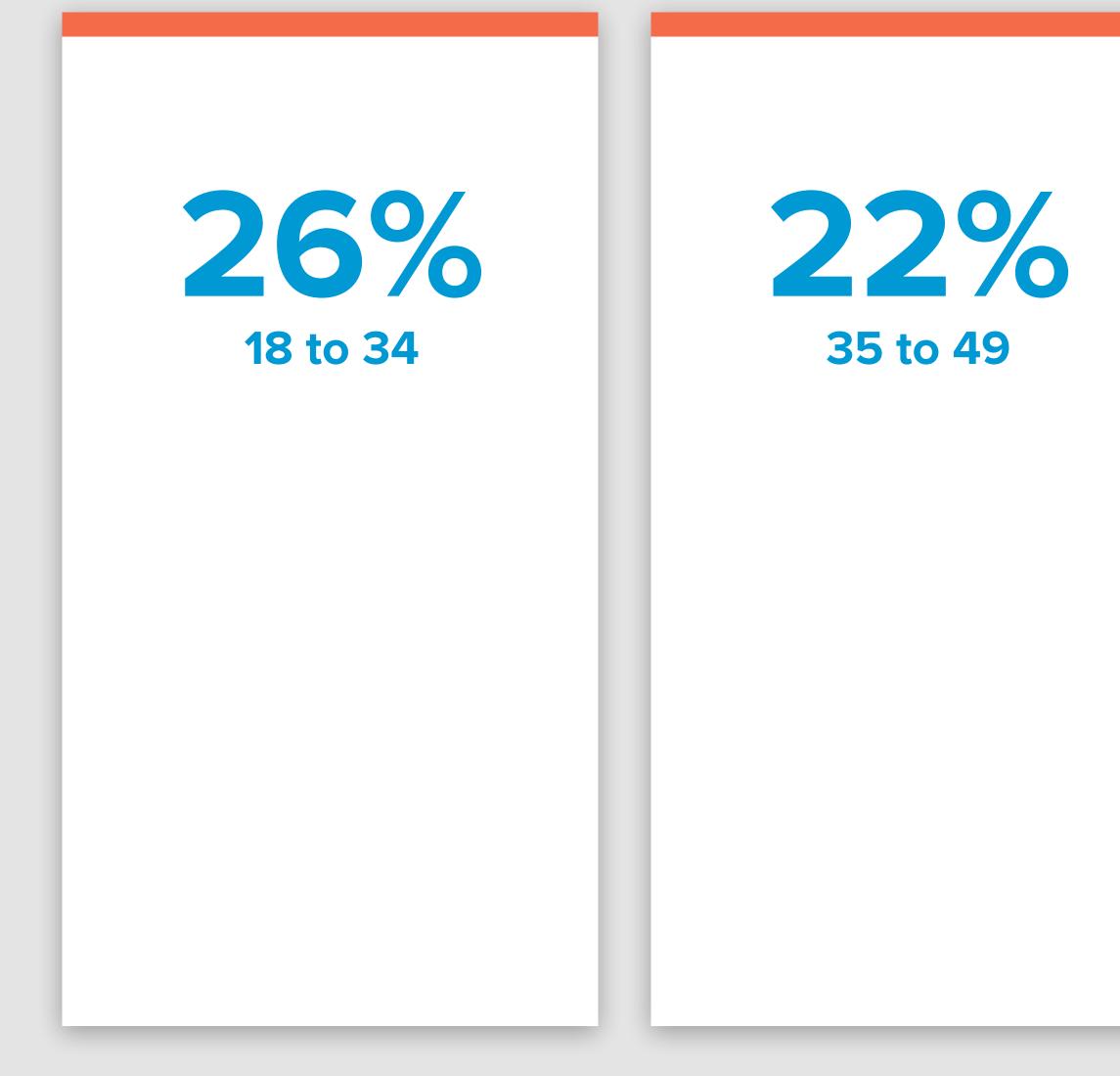
Republican



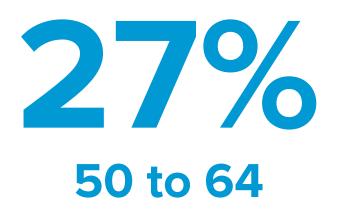
Independent

















Methodology

TARGETING

Registered voters in Santa Barbara County were solicited, between February 15-20, in a survey conducted in English.

Change Research applied proprietary Bias Correct approach to solicitations in order to yield a mostly representative sample.

Incomplete responses, respondents outside of Santa Barbara County, and unregistered voters were filtered out, leaving a sample of 990.



WEIGHTING

Results based on 990 registered voters living in Santa Barbara County, and who answered most of the questions.

Sample demographics are close to this population for age, gender, and ethnicity.

Post-stratification done on gender, age, race, and 2016 presidential vote.







THANK YOU

Contact: Ben Greenfield, ben@changeresearch.com