

LOMPOC VALLEY CANNABIS ASSN. SURVEY

CONDUCTED ONLINE FEBRUARY 15-20, 2019

990 INTERVIEWS ACROSS SANTA BARBARA COUNTY



Copyright © 2018, Change Research, a Public Benefit Corporation

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

45%

Combating organized crime involvement

- 40% of Democrats
- 55% of Republicans
- 45% of Independents
- 40% of Voted for Prop 64
- 57% of Voted against Prop 64

35%

Enforcement of unlicensed cannabis operators

- 32% of Democrats
- 44% of Republicans
- 31% of Independents
- 24% of Voted for Prop 64
- 61% of Voted against Prop 64

34%

Prohibiting access to underage consumers

- 29% of Democrats
- 47% of Republicans
- 31% of Independents
- 26% of Voted for Prop 64
- 52% of Voted against Prop 64

33%

Limiting overregulation and overtaxation

- 31% of Democrats
- 33% of Republicans
- 36% of Independents
- 43% of Voted for Prop 64
- 10% of Voted against Prop 64

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?

11%

Strongly approve

- 13% of Democrats
- 5% of Republicans
- 13% of Independents
- 14% of Voted for Prop 64
- 2% of Voted against Prop 64

40%

Somewhat approve

- 45% of Democrats
- 34% of Republicans
- 36% of Independents
- 47% of Voted for Prop 64
- 26% of Voted against Prop 64

17%

Somewhat disapprove

- 16% of Democrats
- 22% of Republicans
- 16% of Independents
- 17% of Voted for Prop 64
- 28% of Voted against Prop 64

11%

Strongly disapprove

- 6% of Democrats
- 22% of Republicans
- 13% of Independents
- 6% of Voted for Prop 64
- 26% of Voted against Prop 64

21% said Don't know / no opinion.

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



13%

Strongly agree

- 9% of Democrats
- 22% of Republicans
- 12% of Independents
- 3% of Voted for Prop 64
- 39% of Voted against Prop 64
- 1% of Believe cannabis complements wine
- 41% of Believe cannabis competes with wine

11%

Somewhat agree

- 9% of Democrats
- 17% of Republicans
- 11% of Independents
- 7% of Voted for Prop 64
- 23% of Voted against Prop 64
- 2% of Believe cannabis complements wine

17%

Somewhat disagree

- 18% of Democrats
- 17% of Republicans
- 16% of Independents
- 17% of Voted for Prop 64
- 14% of Voted against Prop 64

49%

Strongly disagree

- 56% of Democrats
- 34% of Republicans
- 50% of Independents
- 67% of Voted for Prop 64
- 12% of Voted against Prop 64
- 87% of Like cannabis scent

10% said Don't know / no opinion.

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?

20%

Much more

- 17% of Democrats
- 31% of Republicans
- 15% of Independents
- 6% of Voted for Prop 64
- 56% of Voted against Prop 64

15%

Somewhat more

- 14% of Democrats
- 18% of Republicans
- 15% of Independents
- 14% of Voted for Prop 64
- 21% of Voted against Prop 64

29%

Current regulations are fine

- 33% of Democrats
- 22% of Republicans
- 26% of Independents
- 38% of Voted for Prop 64
- 9% of Voted against Prop 64

18%

Somewhat less

- 18% of Democrats
- 13% of Republicans
- 23% of Independents
- 27% of Voted for Prop 64
- 3% of Voted against Prop 64

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?

34%

Strongly support

- 40% of Democrats
- 23% of Republicans
- 37% of Independents
- 48% of Voted for Prop 64
- 12% of Voted against Prop 64
- 65% of Like cannabis scent

29%

Somewhat support

- 31% of Democrats
- 26% of Republicans
- 29% of Independents
- 31% of Voted for Prop 64
- 22% of Voted against Prop 64

12%

Somewhat oppose

- 12% of Democrats
- 13% of Republicans
- 12% of Independents
- 10% of Voted for Prop 64
- 17% of Voted against Prop 64

14%

Strongly oppose

- 7% of Democrats
- 29% of Republicans
- 13% of Independents
- 6% of Voted for Prop 64
- 41% of Voted against Prop 64

10% said Don't know / no opinion.

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

38%

Yes

- 35% of Democrats
- 49% of Republicans
- 33% of Independents
- 28% of Voted for Prop 64
- 70% of Voted against Prop 64
- 9% of Like cannabis scent
- 73% of Believe cannabis competes with wine

49%

No

- 52% of Democrats
- 39% of Republicans
- 52% of Independents
- 63% of Voted for Prop 64
- 17% of Voted against Prop 64
- 15% of Believe cannabis competes with wine
- 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?



15%

Much more likely to support

- 10% of Democrats
- 24% of Republicans
- 15% of Independents
- 7% of Voted for Prop 64
- 37% of Voted against Prop 64

10%

Somewhat more likely to support

- 10% of Democrats
- 13% of Republicans
- 6% of Independents
- 6% of Voted for Prop 64
- 19% of Voted against Prop 64

21%

No difference

- 22% of Democrats
- 19% of Republicans
- 20% of Independents
- 19% of Voted for Prop 64
- 18% of Voted against Prop 64

18%

Somewhat less likely to support

- 21% of Democrats
- 12% of Republicans
- 18% of Independents
- 23% of Voted for Prop 64
- 7% of Voted against Prop 64

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?

23%

Strongly support

- 24% of Democrats
- 14% of Republicans
- 31% of Independents
- 31% of Voted for Prop 64
- 6% of Voted against Prop 64

31%

Somewhat support

- 36% of Democrats
- 26% of Republicans
- 27% of Independents
- 38% of Voted for Prop 64
- 15% of Voted against Prop 64

10%

Somewhat oppose

- 7% of Democrats
- 14% of Republicans
- 13% of Independents
- 8% of Voted for Prop 64
- 19% of Voted against Prop 64

12%

Strongly oppose

- 9% of Democrats
- 23% of Republicans
- 7% of Independents
- 5% of Voted for Prop 64
- 33% of Voted against Prop 64

24% said Don't know / no opinion.

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?



46%

Strongly support

- 54% of Democrats
- 32% of Republicans
- 47% of Independents
- 57% of Voted for Prop 64
- 24% of Voted against Prop 64
- 26% of Voted against Measure T

30%

Somewhat support

- 31% of Democrats
- 32% of Republicans
- 27% of Independents
- 31% of Voted for Prop 64
- 29% of Voted against Prop 64

8%

Somewhat oppose

- 5% of Democrats
- 10% of Republicans
- 10% of Independents
- 5% of Voted for Prop 64
- 14% of Voted against Prop 64

7%

Strongly oppose

- 3% of Democrats
- 18% of Republicans
- 4% of Independents
- 2% of Voted for Prop 64
- 20% of Voted against Prop 64

9% said Don't know / no opinion.

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

37%

**Cannabis cultivation
and farming**

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

36%

**Cannabis retail
dispensaries**

- 41% of Democrats
- 28% of Republicans
- 31% of Independents
- 40% of Voted for Prop 64
- 24% of Voted against Prop 64

10%

**Cannabis
manufacturing**

- 9% of Democrats
- 11% of Republicans
- 10% of Independents
- 7% of Voted for Prop 64
- 15% of Voted against Prop 64

9%

**Cannabis distribution
(business to business)**

- 7% of Democrats
- 14% of Republicans
- 9% of Independents
- 6% of Voted for Prop 64
- 18% of Voted against Prop 64

9% said Cannabis home deliveries.

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

12%

Competes

- 10% of Democrats
- 19% of Republicans
- 10% of Independents
- 5% of Voted for Prop 64
- 29% of Voted against Prop 64

34%

Complements

- 41% of Democrats
- 19% of Republicans
- 35% of Independents
- 46% of Voted for Prop 64
- 8% of Voted against Prop 64
- 8% of It's an odor, and it really bothers me
- 69% of It's an odor, but totally fine with it

42%

Neither

- 38% of Democrats
- 48% of Republicans
- 41% of Independents
- 40% of Voted for Prop 64
- 46% of Voted against Prop 64
- 24% of Like cannabis scent

12%

Don't know / no opinion

- 11% of Democrats
- 14% of Republicans
- 14% of Independents
- 9% of Voted for Prop 64
- 17% of Voted against Prop 64

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?

40%

Strongly agree

- 48% of Democrats
- 27% of Republicans
- 39% of Independents
- 53% of Voted for Prop 64
- 9% of Voted against Prop 64
- 72% of Believe cannabis complements wine

23%

Somewhat agree

- 22% of Democrats
- 23% of Republicans
- 23% of Independents
- 24% of Voted for Prop 64
- 17% of Voted against Prop 64

10%

Somewhat disagree

- 7% of Democrats
- 12% of Republicans
- 12% of Independents
- 8% of Voted for Prop 64
- 14% of Voted against Prop 64

14%

Strongly disagree

- 10% of Democrats
- 25% of Republicans
- 12% of Independents
- 4% of Voted for Prop 64
- 47% of Voted against Prop 64
- 38% of Don't know any cannabis consumers

14% said Don't know / no opinion.

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

63%

Yes

- 62% of Democrats
- 64% of Republicans
- 65% of Independents
- 65% of Voted for Prop 64
- 36% of Voted against Prop 64

14%

No

- 12% of Democrats
- 21% of Republicans
- 9% of Independents
- 11% of Voted for Prop 64
- 46% of Voted against Prop 64

24%

Don't know

- 26% of Democrats
- 16% of Republicans
- 26% of Independents
- 25% of Voted for Prop 64
- 18% of Voted against Prop 64

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

21%

Like

- 23% of Democrats
- 14% of Republicans
- 27% of Independents
- 29% of Voted for Prop 64
- 3% of Voted against Prop 64

37%

Dislike

- 33% of Democrats
- 47% of Republicans
- 34% of Independents
- 24% of Voted for Prop 64
- 74% of Voted against Prop 64

31%

Neutral

- 30% of Democrats
- 30% of Republicans
- 32% of Independents
- 38% of Voted for Prop 64
- 14% of Voted against Prop 64

11%

Don't know / no opinion

- 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?



60%

Yes

- 56% of Democrats
- 66% of Republicans
- 60% of Independents
- 54% of Voted for Prop 64
- 82% of Voted against Prop 64

29%

No

- 30% of Democrats
- 26% of Republicans
- 32% of Independents
- 37% of Voted for Prop 64
- 11% of Voted against Prop 64

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?

14%

I am totally fine with it

- 18% of Democrats
- 10% of Republicans
- 12% of Independents
- 23% of Voted for Prop 64
- 1% of Voted against Prop 64

39%

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

- 43% of Democrats
- 27% of Republicans
- 45% of Independents
- 50% of Voted for Prop 64
- 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?



16%

Strongly approve

- 23% of Democrats
- 6% of Republicans
- 14% of Independents
- 21% of Voted for Prop 64
- 6% of Voted against Prop 64

40%

Somewhat approve

- 42% of Democrats
- 35% of Republicans
- 41% of Independents
- 44% of Voted for Prop 64
- 38% of Voted against Prop 64

20%

Somewhat disapprove

- 19% of Democrats
- 23% of Republicans
- 21% of Independents
- 18% of Voted for Prop 64
- 27% of Voted against Prop 64

14%

Strongly disapprove

- 8% of Democrats
- 25% of Republicans
- 15% of Independents
- 10% of Voted for Prop 64
- 21% of Voted against Prop 64

10% said Don't know / no opinion.

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?



5%

Strongly approve

- 6% of Democrats
- 2% of Republicans
- 6% of Independents
- 3% of Voted for Prop 64
- 4% of Voted against Prop 64

27%

Somewhat approve

- 33% of Democrats
- 19% of Republicans
- 26% of Independents
- 29% of Voted for Prop 64
- 21% of Voted against Prop 64

31%

Somewhat disapprove

- 33% of Democrats
- 28% of Republicans
- 27% of Independents
- 34% of Voted for Prop 64
- 28% of Voted against Prop 64

23%

Strongly disapprove

- 12% of Democrats
- 41% of Republicans
- 24% of Independents
- 18% of Voted for Prop 64
- 38% of Voted against Prop 64

14% said Don't know / no opinion.

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



4%

Strongly approve

- 5% of Democrats
- 2% of Republicans
- 3% of Independents
- 2% of Voted for Prop 64
- 1% of Voted against Prop 64

14%

Somewhat approve

- 16% of Democrats
- 14% of Republicans
- 11% of Independents
- 16% of Voted for Prop 64
- 13% of Voted against Prop 64

28%

Somewhat disapprove

- 34% of Democrats
- 17% of Republicans
- 26% of Independents
- 35% of Voted for Prop 64
- 23% of Voted against Prop 64

48%

Strongly disapprove

- 37% of Democrats
- 62% of Republicans
- 52% of Independents
- 41% of Voted for Prop 64
- 59% of Voted against Prop 64

7% said Don't know / no opinion.

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?



11%

Strongly approve

- 13% of Democrats
- 7% of Republicans
- 12% of Independents
- 11% of Voted for Prop 64
- 7% of Voted against Prop 64

32%

Somewhat approve

- 37% of Democrats
- 27% of Republicans
- 28% of Independents
- 37% of Voted for Prop 64
- 32% of Voted against Prop 64

10%

Somewhat disapprove

- 8% of Democrats
- 16% of Republicans
- 11% of Independents
- 10% of Voted for Prop 64
- 18% of Voted against Prop 64

11%

Strongly disapprove

- 8% of Democrats
- 17% of Republicans
- 11% of Independents
- 11% of Voted for Prop 64
- 12% of Voted against Prop 64

35% said Don't know / no opinion.

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?



9%

Strongly approve

- 9% of Democrats
- 7% of Republicans
- 11% of Independents
- 10% of Voted for Prop 64
- 3% of Voted against Prop 64

32%

Somewhat approve

- 38% of Democrats
- 23% of Republicans
- 29% of Independents
- 39% of Voted for Prop 64
- 13% of Voted against Prop 64

18%

Somewhat disapprove

- 18% of Democrats
- 18% of Republicans
- 19% of Independents
- 19% of Voted for Prop 64
- 21% of Voted against Prop 64

24%

Strongly disapprove

- 18% of Democrats
- 35% of Republicans
- 24% of Independents
- 15% of Voted for Prop 64
- 53% of Voted against Prop 64

18% said Don't know / no opinion.

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?



10%

Strongly approve

- 12% of Democrats
- 8% of Republicans
- 10% of Independents
- 11% of Voted for Prop 64
- 2% of Voted against Prop 64

32%

Somewhat approve

- 36% of Democrats
- 29% of Republicans
- 29% of Independents
- 37% of Voted for Prop 64
- 32% of Voted against Prop 64

19%

Somewhat disapprove

- 19% of Democrats
- 21% of Republicans
- 15% of Independents
- 18% of Voted for Prop 64
- 23% of Voted against Prop 64

15%

Strongly disapprove

- 9% of Democrats
- 26% of Republicans
- 16% of Independents
- 10% of Voted for Prop 64
- 22% of Voted against Prop 64

24% said Don't know / no opinion.

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.



45%

None of these

- 40% of Democrats
- 45% of Republicans
- 53% of Independents
- 47% of Voted for Prop 64
- 40% of Voted against Prop 64

23%

Field Workers and their families

- 28% of Democrats
- 11% of Republicans
- 24% of Independents
- 24% of Voted for Prop 64
- 21% of Voted against Prop 64

20%

Santa Barbara Agricultural Advisory Committee

- 21% of Democrats
- 14% of Republicans
- 23% of Independents
- 21% of Voted for Prop 64
- 19% of Voted against Prop 64

17%

Santa Barbara Police Union

- 15% of Democrats
- 25% of Republicans
- 15% of Independents
- 11% of Voted for Prop 64
- 33% of Voted against Prop 64

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%

I voted for it

- 77% of Democrats
- 42% of Republicans
- 67% of Independents

24%

I voted against it

- 14% of Democrats
- 45% of Republicans
- 20% of Independents

6%

I don't remember

- 4% of Democrats
- 8% of Republicans
- 6% of Independents

6%

I did not vote on this
Proposition

- 5% of Democrats
- 6% of Republicans
- 7% of Independents

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

- 36% of Democrats
- 28% of Republicans
- 39% of Independents
- 34% of Voted for Prop 64
- 32% of Voted against Prop 64

11%

I did not vote on this Proposition

- 10% of Democrats
- 12% of Republicans
- 13% of Independents
- 6% of Voted for Prop 64
- 10% of Voted against Prop 64

Gender

48%

Male

52%

Female

Ethnicity



58%

White / Caucasian

26%

Hispanic or Latino/a

3%

**Black or African
American**

5%

**Asian / Pacific
Islander**

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

Educational Attainment



12%

High school diploma
or less

36%

Some college, but no
degree

34%

Bachelor's degree, or
four-year college
degree

19%

Graduate degree

Party Registration



50%

Democrat

27%

Republican

24%

Independent

Age Range



26%
18 to 34

22%
35 to 49

27%
50 to 64

24%
65 or older

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