ZOGBY INTERNATIONAL

Poll of California Voters

Submitted to: Vote Hemp Eric Steenstra

Submitted by:

Zogby International

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I. Methodology and Sample Characteristics

Methodology

This is a telephone survey of likely voters conducted by Zogby International from February 22 through February 26, 2007. The target sample is 801 interviews with approximately 24 questions asked. Samples are randomly drawn from telephone cd's of national listed sample. Zogby International surveys employ sampling strategies in which selection probabilities are proportional to population size within area codes and exchanges. Up to six calls are made to reach a sampled phone number. Cooperation rates are calculated using one of AAPOR's approved methodologies¹ and are comparable to other professional public-opinion surveys conducted using similar sampling strategies.² Weighting by [party, age, race and gender] is used to adjust for non-response. The margin of error is +/- 3.5 percentage points. Margins of error are higher in sub-groups.

Zogby International's sampling and weighting procedures also have been validated through its political polling: more than 95% of the firm's polls have come within 1% of actual election-day outcomes.

Sample Characteristics

| Sample Characteristics | Frequency | Valid Percent* |
|-------------------------|-----------|----------------|
| Sample size | 801 | 100 |
| Bay area | 164 | 41 |
| LA/San Diego | 332 | 41 |
| Rest of the state | 305 | 38 |
| Very likely to vote | 724 | 90 |
| Somewhat likely to vote | 77 | 10 |
| Democratic | 336 | 42 |
| Republican | 272 | 34 |
| Green | 16 | 2 |
| Other minor party | 16 | 2 |
| Undeclared | 160 | 20 |
| 18-29 | 101 | 13 |
| 30-49 | 273 | 35 |
| 50-64 | 257 | 33 |

¹ See COOP4 (p.38) in Standard *Definitions: Final Dispositions of Case Codes and Outcome Rates of Surveys.* The American Association for Public Opinion Research, (2000).

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² Cooperation Tracking Study: April 2003 Update, Jane M. Sheppard and Shelly Haas. The Council for Marketing & Opinion Research (CMOR). Cincinnati, Ohio (2003).

| Sample Characteristics | Frequency | Valid Percent* |
|------------------------------|-----------|-------------------|
| 65+ | 148 | 19 |
| 18-24 | 72 | 9 |
| 25-34 | 76 | 10 |
| 35-54 | 301 | 39 |
| 55-69 | 217 | 28 |
| 70+ | 113 | 15 |
| Did not answer age | 22 | |
| Less than high school | 25 | 3 |
| High school graduate | 93 | 12 |
| Some college | 271 | 34 |
| College graduate+ | 410 | 51 |
| Did not answer education | 1 | |
| White | 534 | 68 |
| Hispanic | 149 | 19 |
| African American | 39 | 5 |
| Asian/Pacific | 47 | 6 |
| Other/mixed | 16 | 2 |
| Did not answer race | 16 | |
| Live in large city | 361 | 46 |
| Live in small city | 226 | 29 |
| Live in suburbs | 103 | 13 |
| Live in rural area | 103 | 13 |
| Did not answer locale | 8 | |
| Progressive/very liberal | 126 | 17 |
| Liberal | 160 | 21 |
| Moderate | 210 | 28 |
| Conservative | 193 | 26 |
| Very conservative | 50 | 7 |
| Libertarian | 18 | 2 |
| Did not answer ideology | 45 | |
| Roman Catholic | 225 | 28 |
| Protestant | 300 | 38 |
| Jewish | 26 | 3 |
| Other/none | 241 | 30 |
| Parent of child under 17 | 254 | 32 |
| Not parent of child under 17 | 545 | 68 |
| Married | 469 | 59 |
| Single, never married | 169 | 21 |

| Sample Characteristics | Frequency | Valid Percent* |
|----------------------------------|-----------|-------------------|
| Divorced/widowed/separated | 135 | 17 |
| Civil union/domestic partnership | 25 | 3 |
| Did not answer marital status | 4 | 3 |
| Vegetarian/vegan | 73 | 9 |
| Not vegetarian/vegan | 728 | 91 |
| Less than \$25,000 | 121 | 17 |
| \$25,000-\$34,999 | 74 | 11 |
| \$35,000-\$49,999 | 98 | 14 |
| \$50,000-\$74,999 | 133 | 19 |
| \$75,000-\$99,999 | 82 | 12 |
| \$100,000 or more | 197 | 27 |
| Did not answer income | 95 | |
| Male | 386 | 48 |
| Female | 415 | 52 |

^{*} Numbers have been rounded to the nearest percent and might not total 100.

II. Narrative Analysis

- 5. Marijuana is one variety of the Cannabis plant. THC is the psycho-active ingredient in marijuana that causes the feeling of being high. Are you very aware, somewhat aware, not very aware, or not at all aware that there is another low-THC industrial variety of Cannabis, called industrial hemp, that is grown for its fiber and seed and does not have any of the drug effects of marijuana?
- 7. Are you very aware, somewhat aware, not very aware, or not at all aware that imported hemp raw materials are being used today by major U.S. companies such as Ford, Chrysler, Ralph Lauren, and The Body Shop?
- 11. Are you very aware, somewhat aware, not very aware, or not at all aware that hemp seed and oil are excellent sources of Omega 3 essential fatty acids which doctors traditionally recommend getting from eating fish?
- 12. Are you very aware, somewhat aware, not very aware, or not at all aware that food made with hempseeds contain almost as much protein as soy?

Table 1. Awareness

| Table 1. Tiwal chess | | | | | | | |
|--|---------|------|-------|---------|-------------|------------|------|
| Have aware one you that | Aware | | | Unaware | | | Not |
| How aware are you that? | Overall | Very | Smwht | Overall | Not very | Not at all | sure |
| 5. there is another low-THC industrial variety of Cannabis called industrial hemp? | 60 | 40 | 20 | 40 | 35 | 5 | |
| 7. being used today by major US companies? | 37 | 21 | 16 | 63 | 53 | 10 | 0 |
| 11. Hemp seed and oil are excellent sources of Omega 3 fatty acids? | 34 | 18 | 16 | 65 | 58 | 7 | 1 |
| 12. Contains almost as much protein as soy? | 21 | 11 | 10 | 79 | 67 | 11 | 0 |

A sizeable majority of California's voters say they are aware of another low-THC variety of Cannabis called industrial hemp, while 40% say they are not aware of such a plant. Independent or undeclared voters (65%) are more likely than either Democrats (59%) or Republicans (55%) to say they are aware of industrial hemp. Sixty-four percent of vegetarians and vegans are aware of industrial hemp, while nearly as many who eat animal products (59%) say they are aware.

Among age groups, 30-49 year olds (69%) are the most likely to say they are aware of industrial hemp, followed by 63% of 50 to 64 year olds who are aware. Less than half of those under 30 (49%) and seniors (45%) say they are aware. Men (66%) are more aware than women (54%) and generally, as income increases, so to does awareness.

Though a majority overall are aware that industrial hemp exists, few are aware of how and where it is used. Thirty-seven percent say they are aware that major US companies are currently using industrial hemp in products they sell, while 34% say they are aware that industrial hemp is an excellent source of Omega 3 fatty acids.

Just one in five are aware that industrial hemp has almost as much protein as soy (21%).

- 6. The federal government will not allow US farmers to grow industrial hemp even though Canada and the European Union successfully regulate it for industrial use. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose allowing U.S. farmers to grow industrial hemp under a regulated system similar to the one used in Canada or the European Union?
- 8. If U.S. companies could buy hemp raw materials from U.S. farmers instead of importing the product from other countries, would you strongly support, somewhat support, somewhat oppose, or strongly oppose allowing U.S. farmers to grow hemp? 10. Do you strongly support, somewhat support, somewhat oppose, or strongly oppose changing state law so that California farmers can grow industrial hemp?

Table 2. Support/Oppose

| Support or appaga | Support | | | Oppose | | | Not |
|---|---------|------|-------|---------|------|-------|------|
| Support or oppose | Overall | Str. | Smwht | Overall | Str. | Smwht | sure |
| 8. If US companies could buy hemp raw materials from US farmers instead of importing hemp | 76 | 52 | 25 | 16 | 11 | 5 | 8 |
| 10. Changing state law to allow CA farmers to grow industrial hemp | 71 | 45 | 25 | 18 | 11 | 7 | 12 |
| 6. Allowing US farmers to grow industrial hemp under a regulated system | 62 | 43 | 19 | 22 | 14 | 9 | 16 |

Three in four (76%) say they would support allowing industrial hemp to be grown if they knew that US companies could buy hemp raw materials instead of importing it from other countries. This includes a majority (52%) who are strongly in support. Sixteen percent would be opposed and 8% are not sure. A majority in every sub-group, including 68% of Republicans, would support allowing farmers to grow hemp to sell to US companies.

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Just over seven in ten (71%) voters say that state law should be changed to allow California farmers to grow the plant, while 18% are opposed the changing state law. Twelve percent are not sure of their position.

California voters are three times as likely as not (62% vs. 22%) to say that farmers in the US should be allowed to grow industrial hemp under a regulated system

13. How often have you tried hemp food products?

| Tried once | 7% |
|---------------------|----|
| Tried several times | 11 |
| Eat them regularly | 3 |
| Never tried | 75 |
| Not sure | 5 |

Three in four voters (75%) say they have never tried hemp food products. Just over one in ten (11%) say they have tried such products several times and 7% have tried hemp food products only once. Three percent eat hemp food products regularly. One in twenty (5%) are not sure.

The vast majority in most sub-groups say they have never tried hemp food products. Those most likely to say that have tried these products several times are 22% of voters under 30, 19% of vegetarians and vegans, 14% of men, and 22% of self-described progressives.

Democrats (21%) and undeclared voters (26%) are more likely than Republicans (14%) to have tried hemp food products at least once (combined *once*, *several times*, and *regularly* responses). Not surprisingly, vegetarians and vegans (44%) are more likely than non-vegetarians (18%) to have eaten a hemp food product at least once.

14. If you knew that a product contained hempseed or hemp oil, are you much more likely, somewhat more likely, somewhat less likely, or much less likely to eat it, or would it make no difference?

| Much more likely | 6% | | |
|----------------------|----|-------------|-----|
| Somewhat more likely | 10 | More likely | 15% |
| Somewhat less likely | 8 | | |
| Much less likely | 15 | Less likely | 23% |
| No difference | 56 | _ | |
| Not sure | 5 | | |

More than half (56%) of respondents say it would make no difference in their consumption of a food product if they knew it contained hempseed or hemp oil, while just under one in four (23%) say it would make them less likely to do so. Fifteen percent say they would be more likely to try a product containing hemp and 5% are not sure.

A majority or more in nearly every sub-group say it would make no difference in their likelihood of trying a food product that contained hempseed or hemp oil.

Those most likely to say they would be more likely to try such food products include 16% of Democrats, 25% of those who have tried a hemp food product several times before, 23% of vegetarians and vegans, 20% of 30 to 49 year olds, 18% of women, 17% of whites, 30% of self-described progressives.

Those who are less likely to try a food product containing hemp include 24% of Republicans, 26% of those who have never tried a hemp food product, 29% of those under 30, 25% of women, and 24% of Hispanics.