

MEMORANDUM

TO: Steven Francis, Keepcomingback.com
FROM: John Nienstedt, President
Elizabeth Sheld, Research Analyst
RE: SD Medical Marijuana Dispensaries Survey
DATE: October 19, 2009

This preliminary analysis is based on the topline results from the poll of 505 adults residing in the city of San Diego which we fielded October 14 to 17, 2009. As you know, we have a lot of data to analyze. Further analysis will be performed, but for now:

1. Adult San Diegans tend to oppose legalizing recreational marijuana use. Forty-seven percent say they would vote against a measure to legalize and 40% would support it. The issue, however, is polarizing, as the debate arouses strong passions on both sides: 39% would *definitely* vote against legalization and 29% would *definitely* vote in favor of it. Eleven percent is unsure how they would vote.
2. Only one out of every ten adults now rate crime as a *very* or *extremely* serious problem in their communities. More than half (56%) regard it as less than a somewhat serious problem.
3. The initial question of how the city of San Diego should regulate medical marijuana dispensaries included background information regarding the passage of the Compassionate Use Act and patient rights. Despite those facts, there is still some uncertainty, as 20% do not have an opinion one way or the other. Only 9% want the city to ban dispensaries, so there is little support for an outright ban. There is even less support, however, for an “anything goes” approach with no regulation of dispensaries at all. Almost two-thirds (64%) want dispensaries to be regulated, the majority of which favor heavy regulations (37%) and 27% desiring only a few regulations.
4. Forty-three percent have no idea whether there is a medical marijuana dispensary located in their neighborhood, while 48% believe their neighborhood has no dispensary. Eight percent do have a medical marijuana dispensary in the neighborhood. Further analysis will reveal how many respondents are correct and any significant geographic patterns.
5. Twenty-two percent would like a medical marijuana dispensary to be located in their neighborhood. On the other hand, 21% do not want any dispensaries in the city of San Diego (a striking difference from the 9% who want the dispensaries banned by the city). Another 38% take a NIMBY position on dispensaries, wanting them in the city but no less than two miles away from their home. That leaves 9% who are unsure how far away they want the nearest dispensary and another 10% who do not care.
6. One-third of San Diegans say the Police Chief’s estimate of 40 to 50 marijuana dispensaries in the city is the right amount for San Diego. A small percentage want to see more dispensaries, while 38% say 40 to 50 is too many for the city. Twenty-one percent are unsure about how many dispensaries the city should have.

7. Among those 38% who want fewer dispensaries, 40% of them think the number should be reduced to ten or less and 24% of them do not want any at all. Among the few who want more dispensaries, most would like to see more than 70 in the city.

8. The medical marijuana dispensary regulations about which we asked were all well-received. The two regulations with the strongest support are 1) requiring employees and managers of dispensaries to be fingerprinted and undergo a background check by law enforcement and 2) requiring dispensaries to be one thousand feet from schools and youth facilities. More than 80% of San Diegans think these are good ideas. Requiring notification letters to be sent to nearby residents during the permitting process, prohibiting dispensaries from locating in residentially zoned areas and requiring dispensaries to be non-profit organizations are also popular (almost two-thirds saying these are good ideas). Fifty-five percent say that prohibiting dispensary signage is a good idea, but it may be that respondents are confused by this regulation.

9. Using the city of Anaheim as an example of a city that has fought medical marijuana dispensaries, more than half (52%) of San Diegans agree that cities should not ignore state law and ban medical marijuana dispensaries. In contrast, 40% think cities should be allowed to decide if they want dispensaries in their communities.

10. Even the recent seizure of dispensary records showing that only 2% of patients suffer from cancer, glaucoma or AIDS does not garner majority support for a dispensary ban: 55% still oppose a ban after learning this. This is apparently very strong evidence that banning dispensaries is seen as going too far.

11. On the other hand, San Diegans do not want more dispensaries than the city can afford to regulate. Almost two-thirds oppose increasing the number of dispensaries if the city is unable to financially support the law enforcement needed to police them. Opposition is quite intense as 48% are strongly opposed.

12. The attitudinal questions show widespread support for the underlying rationale for medical marijuana dispensaries. A huge percentage of residents agree that the city has an obligation to ensure convenient access to medical marijuana: 77% agree with such a statement and 51% agree *strongly*. They also overwhelmingly (69%) agree that medical marijuana should be treated like any other drug prescription. More than half (57%) disagree that medical marijuana dispensaries are associated with drug cartels.

13. After respondents received the information related to medical marijuana and the issue of dispensaries, the re-test of the question about how tightly dispensaries ought to be regulated shows a little movement in the direction of stronger controls. The percentage who did not have enough information to offer an opinion drops by 4%, and 42% would now like to see heavy regulations.

14. Almost half (45%) of city adults have at least tried marijuana at some point in their lives. This generally tracks with other local and statewide surveys Competitive Edge has conducted. Of those who have tried it, 28% have used it in the last year. Notably, of the users, 11% have smoked marijuana more than 60 days during the past year. The sample begins to get small here, but 43% of adults who have used it in the last year say they have used it medicinally. However, only one-third of these folks have a prescription for it, which means that two-thirds are self-medicating. A clear majority (65%) of those who say they use marijuana for medical purposes do not get it at a dispensary or via a door-to-door delivery service. More than half who acquire it on their own travel five miles or less.

15. Forty-one percent have a friend or family member who uses marijuana and, of those who do, 46% say it is used medicinally.

Other findings: 37% of adults are more than 55 years of age . . . 52% live in the North City (north of Interstate 8) . . . 61% have resided in their community for more than 10 years . . . 81% have access to a computer with Internet service . . . 47% have at least a college degree . . . Self-described liberals outnumber conservatives by 10% . . . 64% have no children under the age of 18 living in their household . . . 50% are married and 29% are single/never married . . . 51% describe themselves as white and 17% are Hispanic . . . 27% have household incomes of \$80,000 or more . . . Gender is evenly split . . . 8% are Spanish-speakers.