City of Claremont Survey Analysis

The City of Claremont requested that HdL develop a survey to gauge community interest and concerns regarding potential legalization and permitting of commercial cannabis businesses within the City. The survey included a total of 48 questions designed to measure respondents' general attitudes towards cannabis and their interest or comfort level with allowing each of the various cannabis business types in the City. The survey also included questions to help inform future decisions regarding the number of businesses to be allowed, zoning, sensitive uses, permitting processes, taxes, and priorities for spending any revenue from cannabis taxes.

The survey was posted online using SurveyMonkey, with access provided through the City's website. The survey was opened on Monday, March 21, 2022 and made available for three weeks through April 11, 2022. The City received a total of 478 responses.

Sorting for Duplicate Responses

The first step in our analysis was to sort the data for any duplicate IP addresses to identify any coordinated attempts by individuals to skew the results. We noted 62 responses from 29 duplicate IP addresses. 26 of these addresses had 2 responses each and 3 addresses had 3 responses each. Of these 62 responses, 36 either somewhat or strongly supported allowing commercial cannabis businesses in the City[1], 23 either somewhat or strongly opposed allowing such businesses in the City, and 3 registered "*No Opinion/Do Not Care*". The split between general support and general opposition suggests that these duplicate addresses did not significantly skew the results one way or another.

Upon analysis, we determined that having 2 or 3 responses from a single IP address was more likely to indicate multiple people within the same household using the same computer than coordinated attempts to skew the results. We also noted that many of the duplicate respondents gave different answers to some of the key questions, including Question 6 ("*In general, do you support or oppose allowing commercial cannabis businesses in Claremont?*"). For these reasons we chose to leave these duplicate responses rather than remove them.

Controlling for a Representative Sample

With any type of survey, the accuracy of the results depends upon the ability to ensure that the survey respondents are representative of the overall population of the City. As an online survey, the results are limited to those persons who voluntarily chose to take the time to participate. Given this, it is fair to assume that respondents likely have stronger feelings on the issue than the public at large, whether in support or opposition.

[1] Question 6: "*In general, do you support or oppose allowing commercial cannabis businesses in Claremont?*"

To control for a representative sample, we have included Question 3; "*How did you vote on Proposition 64, the Adult Use of Marijuana Act in 2016?*". This allows us to adjust the overall results to align with these known election results. Voters in the City of Claremont supported Proposition 64 by 59.20%. This is generally consistent with the 59.54% support in Los Angeles County as a whole, and more than 2 percentage points above the 57.13% support statewide.

In Figure 1, below, we have compared the percentage of support for Proposition 64 expressed by survey respondents to the percentage of support expressed by the City's voters in the November 2016 election. Voters who supported Proposition 64 were over-represented by 18.01% in these survey results compared to the percentage of votes cast in the City.

We also note that 18% of survey respondents reported either not having voted on Proposition 64 (78 responses) or did not respond to the question (8 non-responses). This is significantly higher than the 4.7% of undervotes shown in the City's November 2016 election results. While we cannot know the reasons for this discrepancy, we can assume that these responses may include some number of people who voted on Proposition 64 but merely declined to state how they voted.

This 18% correlates with the 18% difference in reported support for Proposition 64, which could conceivably suggest those who voted against Proposition 64 were somewhat less likely to say so, but this would be entirely supposition. We recommend that the City not assign any meaning to the similarity between these figures.

Figure 1:

Survey Question 3	Responses	Percentage	Prop. 64	Difference
Yes, Support	274	69.90%	59.20%	+18.10%
No, Oppose	118	30.10%	40.80%	
Did Not Vote/No Response	86	18%	4.70%	
Total Responses	478			
Note: The top of the chart represents only that percentage of responses or votes tallied "Yes" or "No", but does not include non-responses or undervotes. The bottom of the chart shows these non-responses/undervotes as a percentage of the overall surveys received or ballots cast. For this reason, the results in the top of the chart tally to 100%, but adding the percentages in the bottom chart would exceed 100%.				

From this analysis, we believe that residents who voted in support of Proposition 64 are somewhat over-represented in these survey results, by approximately 18%. We do not see any reason to attribute this to any organized attempt to skew the results. Rather, we believe that this indicates that supporters of Proposition 64 and of commercial cannabis legalization in general have a keen interest in the issue that makes them somewhat more motivated to be involved and take part in the survey.

We note that the impact of this slight bias in the results likely has the most notable effect on questions about general attitudes toward cannabis and would have a lesser effect on more specific questions about specific cannabis business types, allowable locations, use of tax revenue and other details.

General Attitudes toward Cannabis

Questions 1 and 2 ask respondents whether they generally support or oppose legalized cannabis for medicinal use (Question 1) and adult recreational use (Question 2). The responses show 79.87% of respondents support legalized cannabis for medicinal use, with 67.30% supporting legalized cannabis for recreational use. Applying our 18% adjustment to provide a more representative sample set brings these levels of support down to a still significant 65.49% for medicinal use and 55.18% for adult use.

The positive responses to Question 4 (*Do you personally use cannabis for medical use?*) and Question 5 (*Do you personally use cannabis for adult recreational use?*) are generally in line with the upper end of estimates HdL typically uses for purposes of market analysis, which assume between 13%[2], and 22%[3] of adults use cannabis on a regular basis. 20.63% of respondents state they regularly use cannabis for medicinal purposes and 21.68% state they regularly use cannabis for adult recreational use. Adjusting these figures by 18% to provide a more representative sample would still yield over 17% of the population that uses medical or recreational cannabis on a regular basis.

An additional 14% to 22% of respondents report using cannabis occasionally or rarely. Applying our same adjustment and adding this to the figures above suggests that around 32% of the population report using medicinal or recreation cannabis either regularly or occasionally.

Question 6 asks "*In general, do you support or oppose allowing commercial cannabis businesses in Claremont?*". The results show 59.49% of respondents either strongly or somewhat support allowing commercial cannabis businesses in the City. Applying our 18% adjustment brings this down to 47.96%. By comparison, 46.51% of respondents either strongly or somewhat oppose allowing commercial cannabis businesses within the City (with our adjustment applied).

Support for Specific Cannabis Business Types

Questions 7 through 21 ask respondents whether they would support or oppose allowing various types of commercial cannabis businesses within the City of Claremont. The survey provided a brief description of each cannabis business type to help inform the respondents.

Figure 2 (next page) provides the percentage of respondents who either strongly or somewhat support allowing each cannabis business type, and the percentage of those who either strongly or somewhat oppose each business type. With the exception of manufacturing using volatile solvents, all cannabis business types received more support than opposition, though cannabis cultivation outdoors or in greenhouses failed to reach 50% support, as did manufacturing using non-volatile solvents. We note that we have not adjusted the results for these survey questions as they are more specific in nature and less likely to be influenced by general attitudes toward cannabis. The significant variation in levels of support between non-storefront retail (61.09%) and volatile manufacturing (24.42%) is evidence of this.

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[2] CBS News (2018) *"17 stoner states: Where's marijuana use highest?"* https://www.cbsnews.com/pictures/17-stoner-states-wheres-marijuana-use-highest/9/

[3] Christopher Ingraham (April 20, 2017) "How many Americans regularly use pot? The number is, errr, higher than you think" Sacramento Bee http://www.sacbee.com/news/nation-world/national/article145681414.html

Figure 2:

Cannabis Business Type	Strongly or Somewhat Support	Strongly or Somewhat Oppose
Commercial cultivation outdoors	47.17%	44.67%
Commercial cultivation in a greenhouse with supplemental lighting	48.53%	44.44%
Commercial cultivation in a greenhouse without supplemental lighting	46.94%	40.82%
Commercial cultivation indoors	50.79%	40.14%
Commercial cannabis manufacturing using non-volatile solvents	51.02%	38.55%
Commercial cannabis manufacturing using volatile solvents	24.43%	64.03%
Commercial cannabis manufacturing using non-solvent methods	47.51%	38.69%
Commercial cannabis packaging, repackaging and labeling	51.36%	37.10%
Commercial cannabis distribution	55.43%	38.91%
Commercial cannabis testing laboratories	57.69%	34.62%
Storefront retailers for medicinal cannabis	57.70%	39.31%
Storefront retailers for adult recreational use cannabis	54.97%	42.76%
Non-storefront (delivery-only) retailers for medicinal cannabis	61.09%	32.13%
Non-storefront (delivery-only) retailers for adult recreational use	57.47%	36.43%
Commercial cannabis microbusiness	53.74%	39.91%

Findings

Based on our analysis of the survey results, HdL provides the following findings for the City Council to consider as it continues its discussions regarding cannabis legalization in the City.

Finding 1: Support for commercial cannabis businesses is neither overwhelming nor uniform

The survey results show that there is general support for allowing commercial cannabis businesses within the City, but that this support is neither overwhelming nor uniform. Though nearly 80% of respondents strongly or somewhat support legalized cannabis for medicinal use, and over 67% of respondents support legalized cannabis for adult recreational use, the level of support comes down significantly when considering each specific type of cannabis business, with some business types receiving less than 50% support.

Finding 2: The City should focus its efforts on cannabis retailers and distributors

Cannabis retailers and distributors were the only business types which registered at or above 55% support in this survey. Though microbusinesses and some types of manufacturing and cultivation exceeded 50% support, we believe that this minimum majority does not indicate clear direction from the community. Cannabis retailers most directly address the community's stated support for allowing access to medicinal and recreational cannabis for those who use it. Though not addressed in this survey, cannabis retailers also provide the greatest opportunity for generating revenue through cannabis taxes.

We note that there was also significant support for cannabis testing laboratories. While we would not dissuade the City from allowing them, we note that there are very few such laboratories in the state and would suggest that the City not anticipate receiving interest from potential businesses.

Finding 3: The City should continue to engage the community as it moves forward

The results of the survey suggest that the City has an active and involved citizenry that desires to be actively involved in this issue. The responses showed a level of engagement and a willingness to work through a lengthy and detailed survey (48 questions and 1,350 words) to provide meaningful input. Continued community discussion about these issues will help to build consensus and support for future direction.