



CivicScience Insight Report

Marijuana Legalization Goes Mainstream.

What Does it Mean for Marketers?

Not long ago, people who openly supported the recreational use of marijuana represented a minority group in the U.S. and were associated with a particular stereotype. All of that is changing.

Currently, 23 U.S. states and the District of Columbia have legalized marijuana for medical use, two of which have legalized it for recreational use as well. Colorado has found that it is driving millions of dollars in net-new tax revenue. Other states are currently reviewing their policies. *The New York Times* has endorsed it, and The Pew Foundation published data this year that shows decriminalization advocates now clearly outnumber opponents (see References section at end of this report for links to these cited articles).

As attitudes have evolved, so has the marketing landscape and the marketing opportunity.

To better understand the public sentiment around legalizing marijuana that typically drives these state-by-state legislative changes, CivicScience analyzed the responses of 453,653 U.S.-based adults over the past nearly two years who answered the following question:

“Would you support or oppose a law in your state that would legalize, tax, and regulate marijuana like alcohol?”

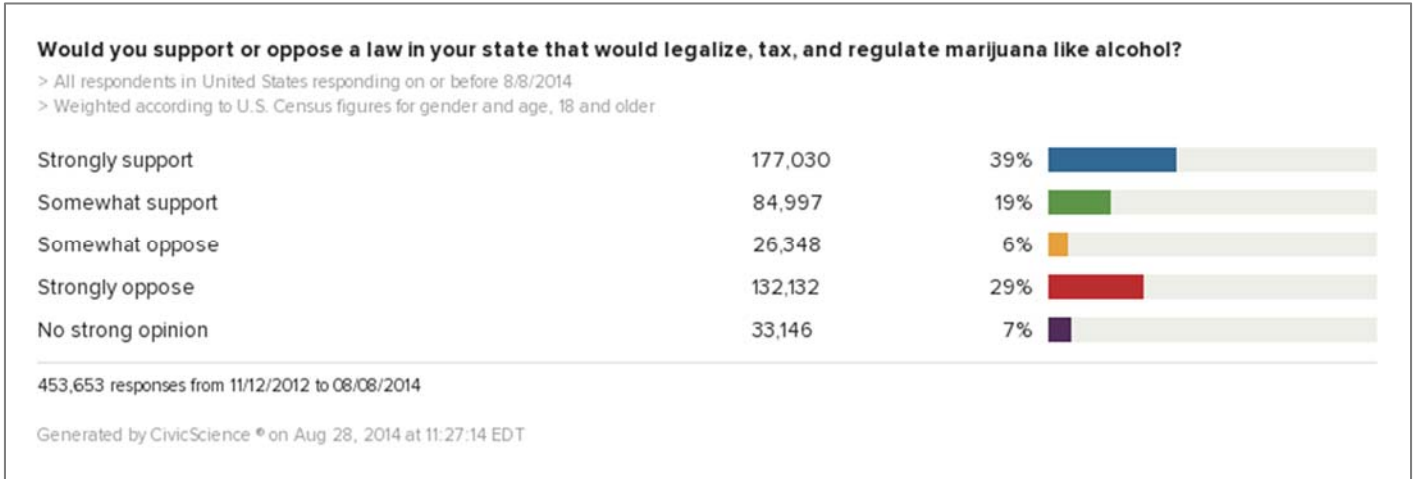
The results show that the majority of American respondents are in support of treating marijuana as we do alcohol:

- 58% of respondents support legalization
- 35% oppose it
- 7% have no strong opinion

August 2014 Report: This Insight Report provides deep demographic and psychographic data about today’s supporters of marijuana legalization, to provide marketers greater insights into the changing consumer landscape associated with more mainstream acceptance of this issue.

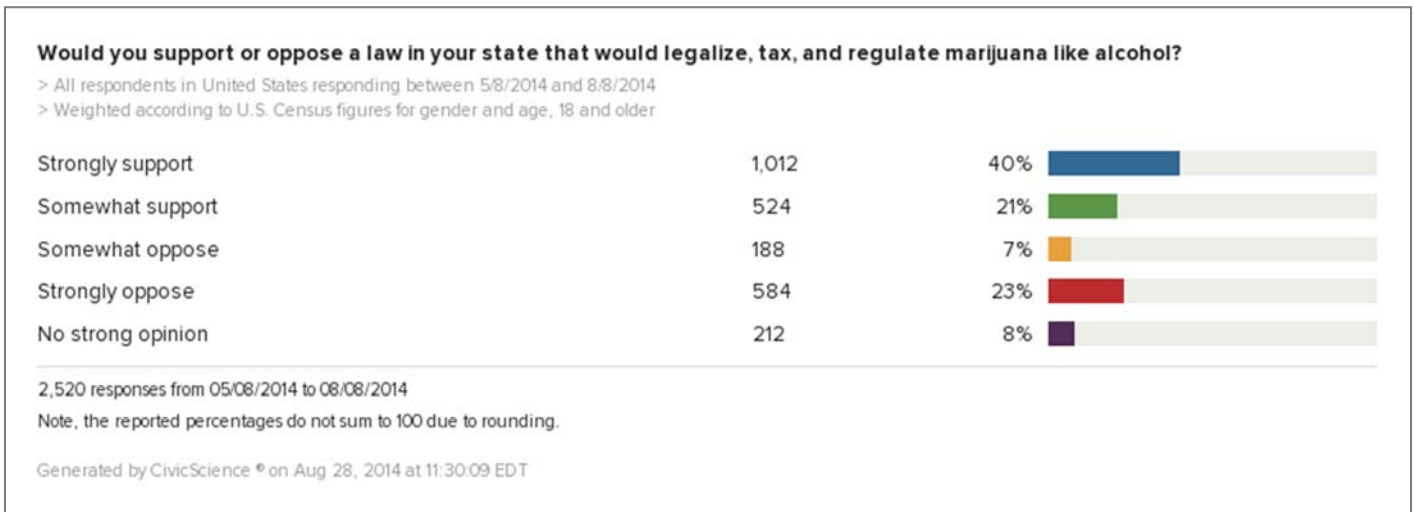


CivicScience Insight Report (continued)



Looking only at data over the past three months, support continues to grow: with 61% saying they strongly or somewhat support, while 30% somewhat or strongly oppose, and 8% have no strong opinion. The recent shift in numbers has been from those in opposition to now supporting to varying degrees.

Recent Three-Month View:



As previously referenced, the Pew Foundation published similar numbers in April 2014, though reporting a slightly lower (54%) level of support. That difference could be attributed to margin of error, different question wording, respondent sample, survey method, or some combination.



CivicScience Insight Report (continued)

The Changing Profile of Supporters

By comparing how those respondents to the marijuana legalization question also answered any of thousands of other poll questions in the CivicScience InsightStore™, we are able to report additional insights about the supporters:

- **By Gender:** Men (60%) are slightly more likely than women (55%) to be supporters.
- **By Age:** We see consistent support by age, with numbers peaking at 67% among people age 25-34. The only age group that opposes legalization, on balance, are those over 65 (50% Oppose/43% Support).
- **By Income:** Results are remarkably steady across income categories, with a variance of just 3% between groups with the highest and lowest support.
- **By Education:** Respondents here are equally consistent – support is 3% higher among people with graduate degrees or PhDs than among those having a GED, high school education, or less.
- **Political Leanings:** The biggest difference in these segments remains largely political, with 37% of Democrats vs. 21% strongly supporting the legalization, and 53% of Republicans and 17% of Democrats in strong opposition. Among Independents, 41% said they are in strong support and 32% strongly oppose the legalization.
- **Political Engagement:** Though still more than half (58%) of supporters say they always vote in political elections, 68% of non-supporters say the same.
- **Parental Status:** Supporters are less likely to be parents or grandparents than opponents (43% vs. 25%).

From a health perspective, supporters don’t really differ from opponents for questions asked about how healthy they think they are; whether they are overweight; exercise frequency; and visits to doctors.

What Consumer Brands and Celebrities Do the Supporters Favor?

The following consumer brands and retailers over-index in popularity among marijuana legalization supporters – meaning, when asked about the brand, they respond that they “like” or “love” it:

Brand / Celebrity	% of Strong Supporters who Favor the Brand	% of Strong Opponents who Favor the Brand
Red Bull	22%	7%
Budweiser	34%	25%
The Gap	23%	16%
Starbucks	40%	29%
Chipotle	32%	23%
Trader Joe’s	34%	24%
Whole Foods	31%	22%
Apple (Mac) computers	41%	33%
Mini (cars)	29%	17%



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From a behavioral standpoint, other things that the CivicScience data revealed about the strong supporters of marijuana legalization include:

- The strongest supporters consume wine more than the strongest opponents (46% vs. 33%).
- They are more likely to have Facebook accounts vs. strong opponents (73% vs. 56%).
- They are more influenced to make purchases or media consumption decisions based on comments or recommendations they see on online social media site (40% vs. 34% of opponents).
- They are more likely to frequently shop online (35% vs. 25%).

What About the Non-Supporters?

Those who oppose the legalization of marijuana tend to be more likely highly favor obvious “heartland” brands like Walmart, Shoney’s, Texas Roadhouse, Cabela’s, and Cracker Barrel.

Other brands over-indexed among the opponents include Lockheed Martin, Estee Lauder, and Clinique. Being a more conservative group, they are found to much more likely “love” Glenn Beck and Ann Coulter.

Other insights that the data found:

- Opponents are more likely to never drink beer than strong supporters (52% vs. 35%).
- They are more likely to own a gun (51% vs. 41% of strong supporters).
- They are more likely to say they are very concerned right now about the economy and jobs (80% vs. 62 of strong supporters).

In Summary

The current state of consumers in support of marijuana legalization is more reflective of the behaviors we see among the general population. They are more likely to be in favor of popular mainstream brands, engaged with social media, and exhibiting modern shopping behaviors. Marketers should be aware of the profile of these consumers and be ready as legalization comes to town.



CivicScience Insight Report (continued)

Additional References:

The New York Times (July 27, 2014):

http://www.nytimes.com/interactive/2014/07/27/opinion/sunday/high-time-marijuana-legalization.html?_r=2

Pew Research (April 2, 2014):

<http://www.people-press.org/2014/04/02/section-2-views-of-marijuana-legalization-decriminalization-concerns/>

Colorado.Gov – Marijuana Tax Data

<http://www.colorado.gov/cs/Satellite/Revenue-Main/XRM/1251633259746>

ProCon.Org – List of Legal Medical Marijuana States

<http://medicalmarijuana.procon.org/view.resource.php?resourceID=000881>

About the CivicScience Methodology:

CivicScience collects real-time consumer research data via polling applications that run on hundreds of U.S. publisher websites, cycling through thousands of active questions on any given day. Respondents answer just for fun and are kept anonymous, allowing for greatly reduced bias and higher levels of engagement. Using technology, CivicScience builds deep psychographic profiles of these anonymous respondents over time, providing valuable consumer sentiment data to the decision makers who care. Automated data science technology allows clients to rapidly gain robust consumer insight and trending reports. The CivicScience methodology has been validated by a team of academic leaders and by independent consulting firms. Responses may be weighted for U.S. census representativeness for gender and age. CivicScience currently has more than 27 million anonymous consumer profiles and 600 million responses stored, growing daily.

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