Survey of North Carolina Voters

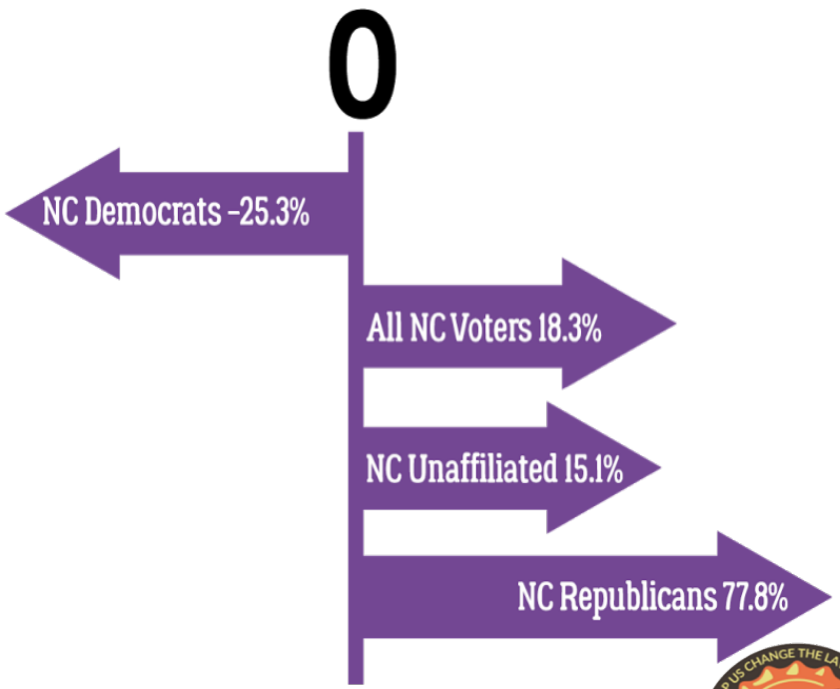
Prepared for Craft Freedom February 8-9, 2017
Strategic Partners Solutions

Methodology

- This poll of 800 registered voters, including 200 cell phone only households, living in North Carolina was conducted via telephone by professional interviewers over the course of two nights, February 8 -9, 2017. Interview selection was random within predetermined election units. These units were structured to correlate with actual voter participation from past Presidential Election voter participation results.
- The poll of 800 likely general election voters has an accuracy of +/- 3.46% at a 95% confidence interval.
- Paul Shumaker served as project manager for the survey.

Political Overview of North Carolina

North Carolina continues to be in a state of political transition. While the state continues to be a conservative to moderate state, the growth of the Unaffiliated voters is pushing the state closer to the middle. Republicans are 77.8 pts to the right while Democrats continue their march to the left at -25.3. The Unaffiliated voter in this survey is +15.1 to the right, just slightly left of the state as a whole which is 18.3 points to the right. Bottom line, neither of the two major political parties are ideologically representative of the state and the political energy to winning in North Carolina rests with the Unaffiliated voters



***Ideological position determined by subtracting the percent of voters who said they were liberal from the percent of voters who said they were conservative.**

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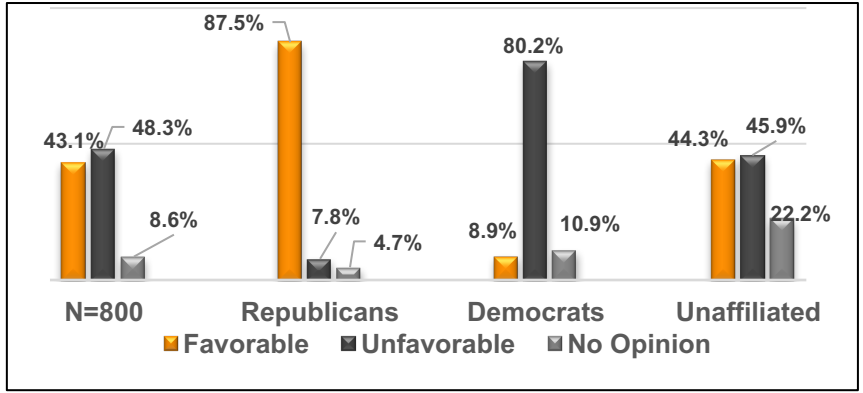
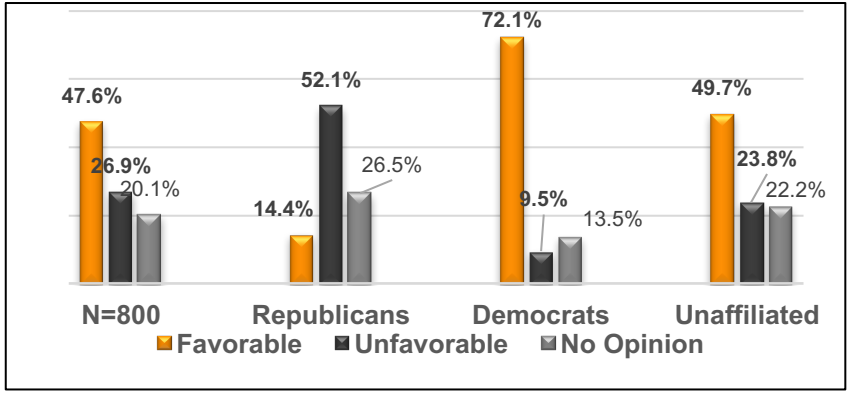


President Donald Trump is 43.1% favorable to 48.3% unfavorable with voters with 8.6% saying they have no opinion of him. While his overall image is net-negative, the negative has more to do with math and the partisan divide of NC. Given that Democrats enjoy a roughly 10-point registration advantage over Republicans, the partisan divide equals the net-negative image.



Governor Roy Cooper is a less polarizing political figure with 47.6% of all voters favorable to just 26.9% unfavorable. 20.1% had no opinion and 5.4% said they had never heard of him. Democrats were 72.1% favorable to 9.2% unfavorable, Republicans 14.4% favorable to 52.1% unfavorable and Unaffiliated voters 49.7% favorable to 23.8% unfavorable.

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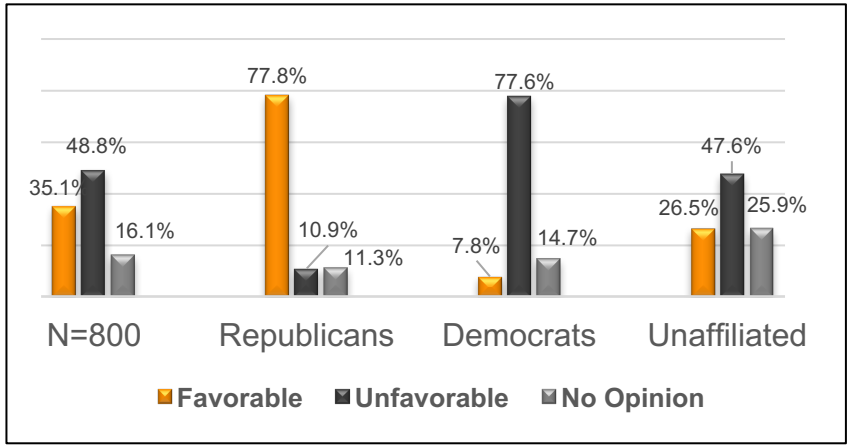

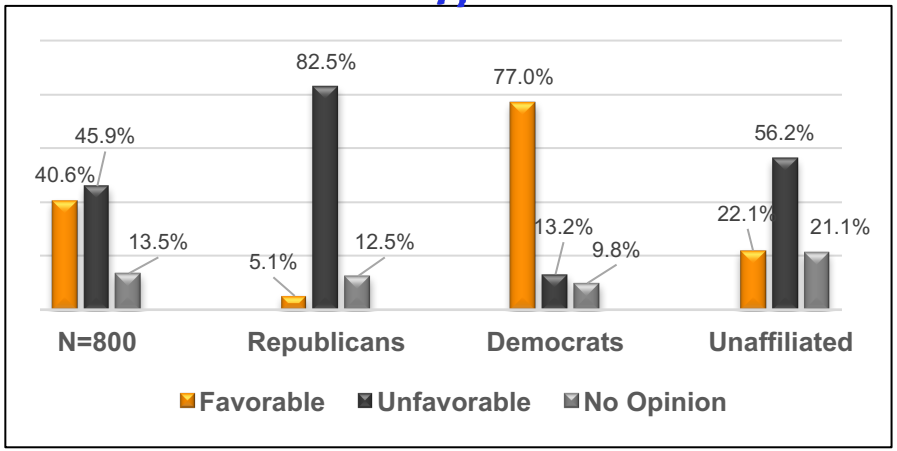

Both the Republican Party and Democratic Party suffer from net-negative images. The math of the partisan divide again drives the net-negative differences for both parties. However, a point of concern for Democrats. The Republican brand was 26.5% favorable to 47.6% unfavorable with Unaffiliated voters (net-negative -21.1%) compared to the Democratic Party which was net-negative 22.7% to 56.2%, a net-negative rating of -33.5%.

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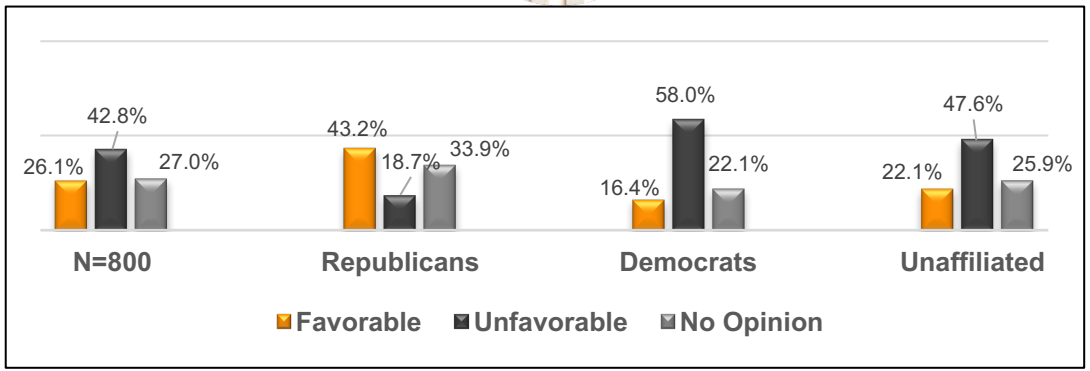
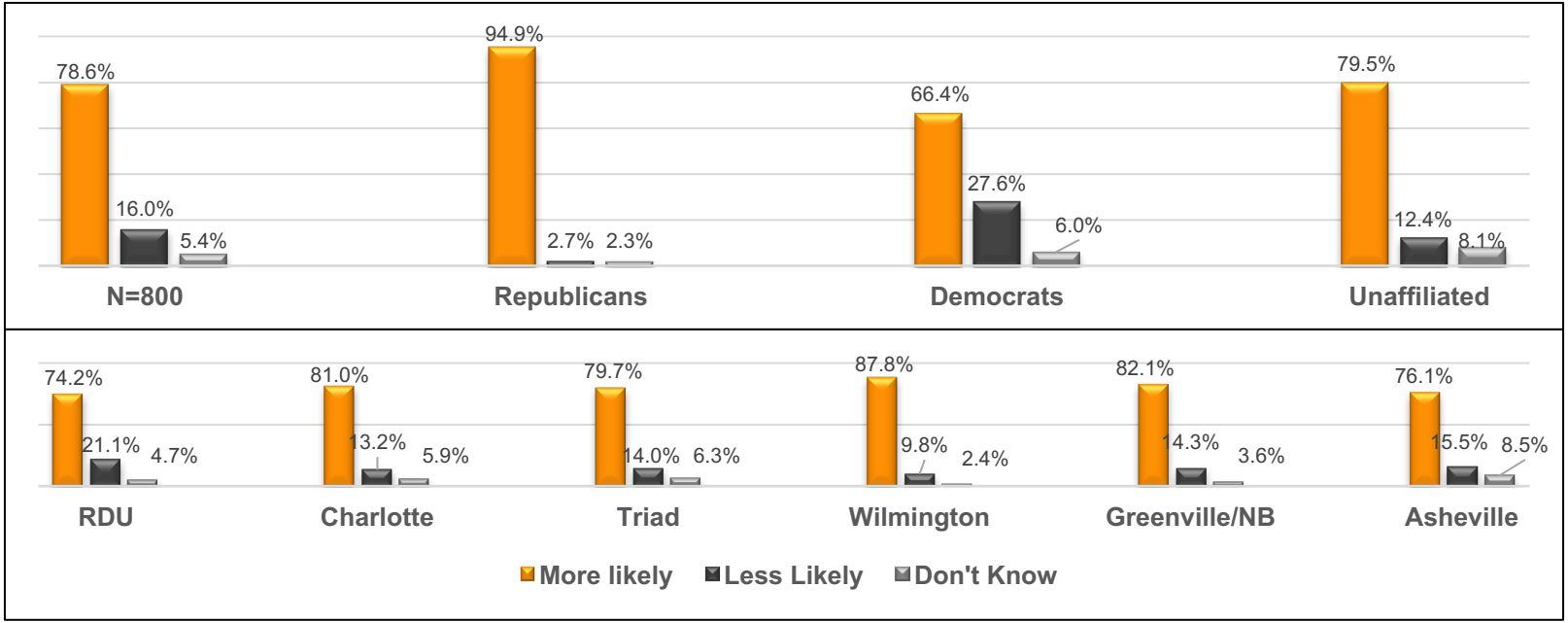


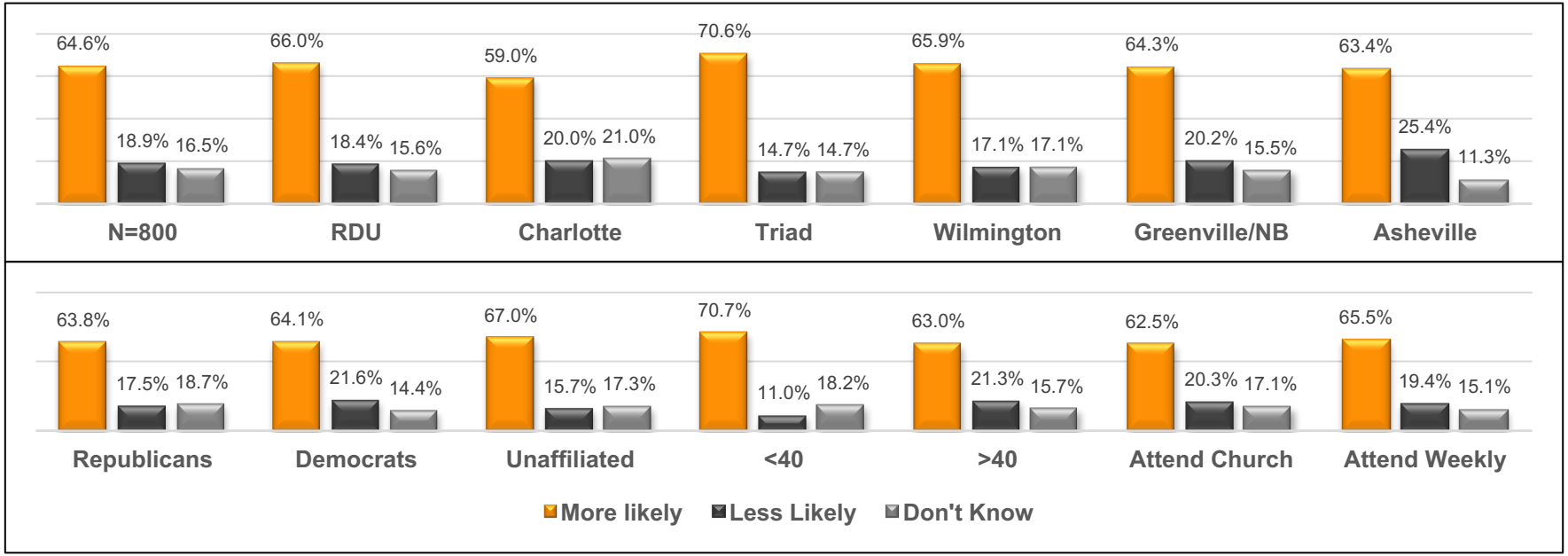
Just 1 out of 4 voters have a favorable opinion of the General Assembly. Democratic voters most unfavorable followed by Unaffiliated voters. Just under half of the Republican voters were favorable to the General Assembly with nearly one-third not having an opinion.

More likely/less likely to Support: A lawmaker or candidate who supports lowering the income tax rate for small businesses and corporations.



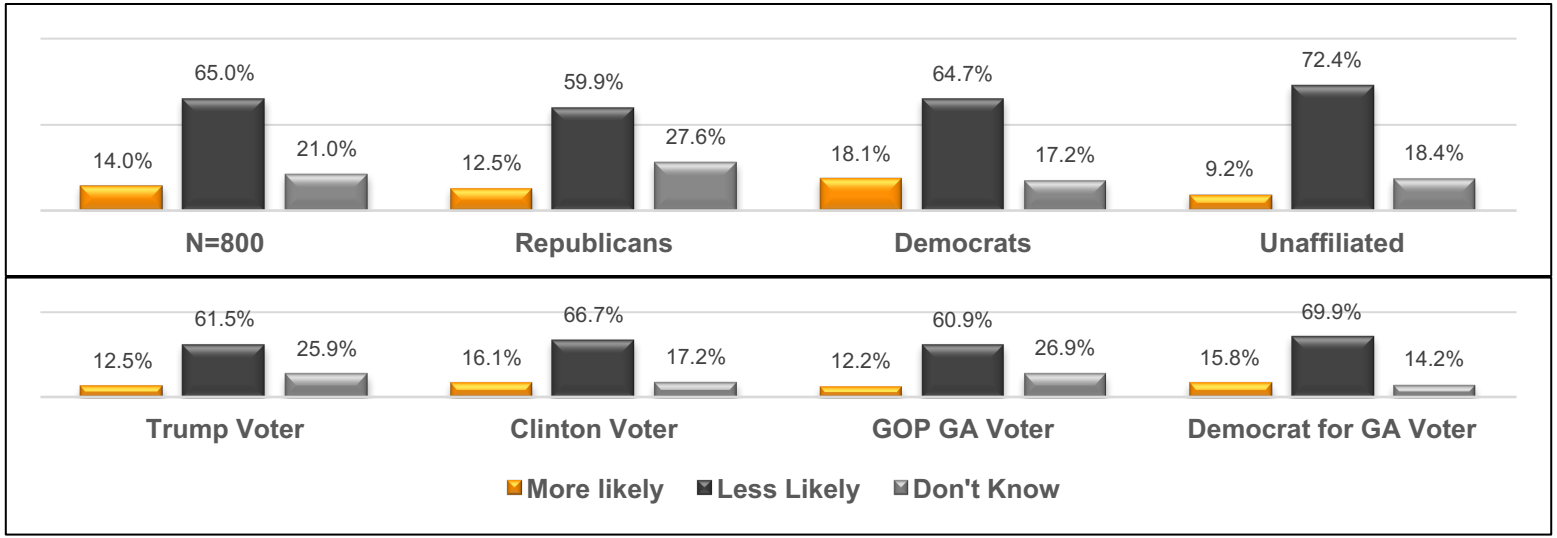
There is strong support across the state for lower taxes on small businesses and corporations.

More likely/less likely -- A lawmaker or candidate who supports policies that encourage the continued growth of the microbrewery industry in North Carolina.



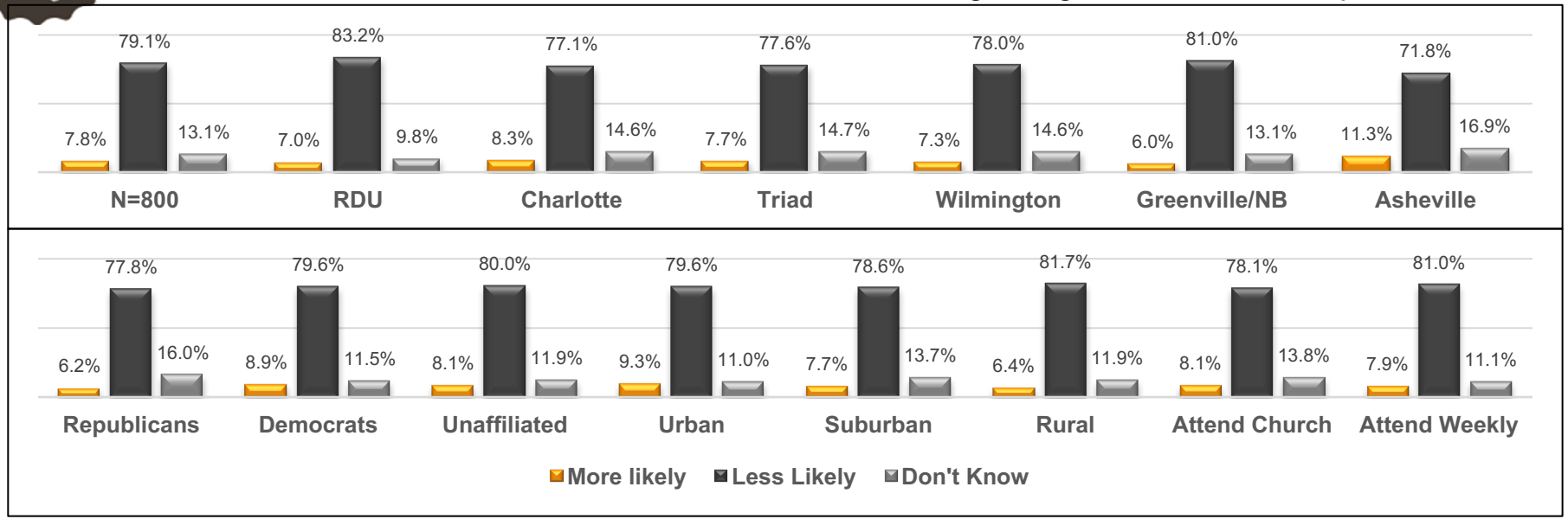
Support for microbreweries is strong even with those who attend church: 62.5% More likely to support a candidate who support pro-industry policies to 20.3% who said less likely. Even those who said they attended weekly were 65.5% likely to support to 19.4% less likely.

More likely/less likely to Support: A lawmaker or candidate who supports a government mandate requiring a microbrewery to relinquish all distribution and marketing rights to another person's company once they are successful in creating a statewide or national demand for their products.



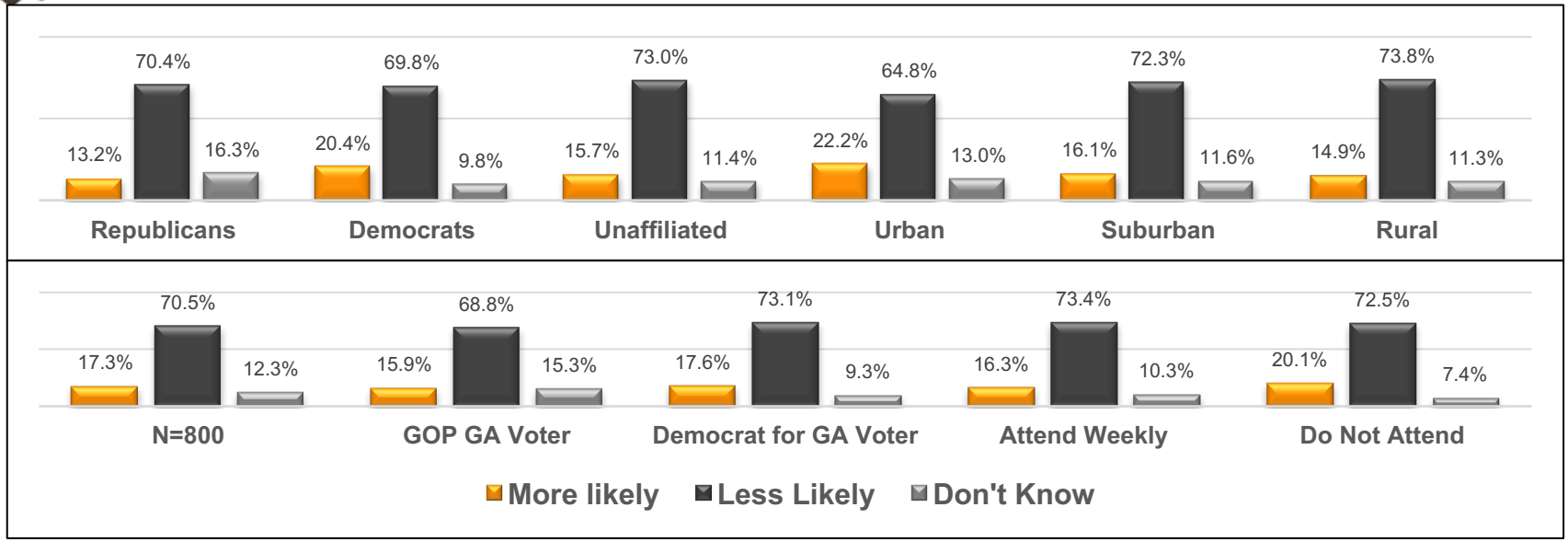
Voters do not like the government mandate forcing microbreweries to relinquish all distribution and marketing rights. About 1 out of 5 did not know which indicates a need for more information on the issue. However, two-thirds of all voters were less likely to support a lawmaker over the issue.

More likely/less likely to Support: A lawmaker or candidate who supports putting production limits on North Carolina microbreweries in order to benefit big foreign owned beer companies.



NC Breweries verses the big four foreign beer companies drives support to the hometown breweries. On this issue set, support for the local breweries transcended geographic boundaries as well as partisan boundaries. Even those voters who said they attended church on a weekly bases were 81% less likely to support a candidate who advocated production limits in order to benefit the big beer companies.

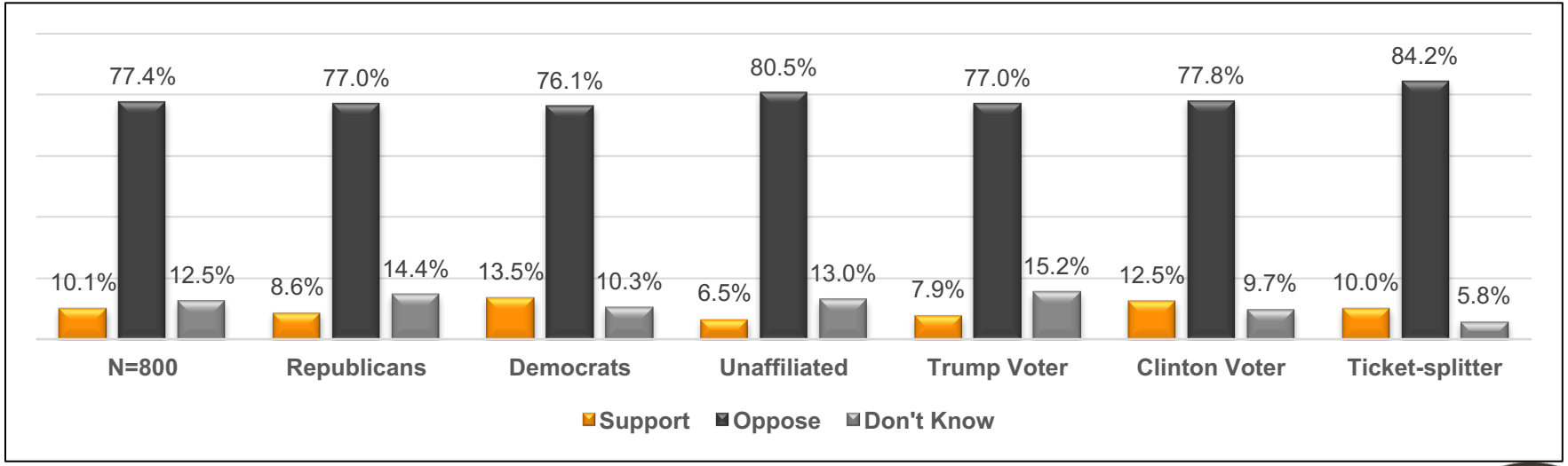
More likely/less likely to Support: A lawmaker or candidate who supports banning North Carolina microbreweries from self-distributing their products to the retailer of their choice.



Voters don't like the idea of a lawmaker or candidate who supports banning microbreweries from distributing their own product. Even voters who side they attended church weekly were 73.4% likely to oppose while those who said they did not attend were 72.5% likely to oppose a candidate or law maker who supported such a ban.

Voters were read the following: In 2003, the state legislature passed a law that allows for the sale and distribution of beer with a higher alcohol content. This legislation created a fast-growing microbrewery industry resulting in over 150 new microbreweries and thousands of new jobs in small communities across the state. Currently, any microbrewery in the state that produces more than 25,000 barrels in one year must give their marketing rights and distribution rights to a third party wholesale distributor.

Then they were asked: Would you say you support or oppose this state mandated distribution cap requiring microbreweries to relinquish their right to self-distribute their own product after reaching the 25,000-barrel production cap?



Voters are opposed to the state system that requires microbreweries to relinquish their rights to a wholesale distributor once the reach the 25.000 barrel production cap.

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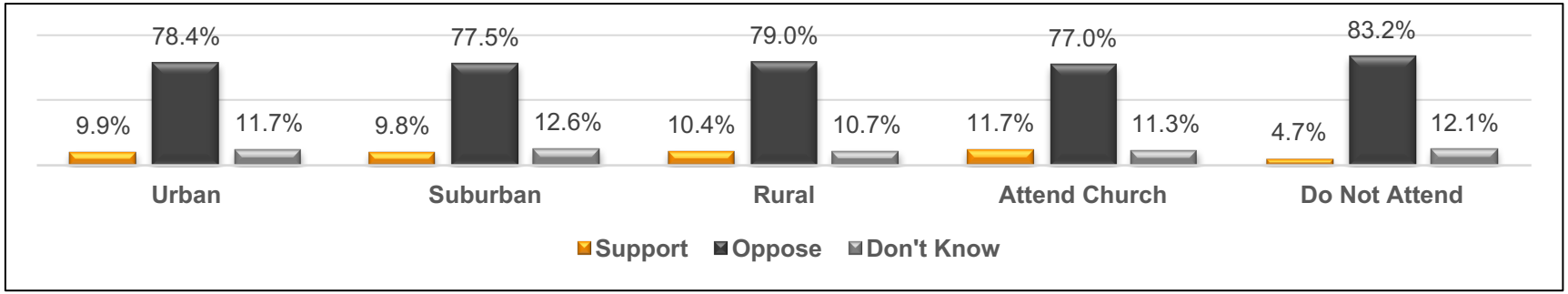
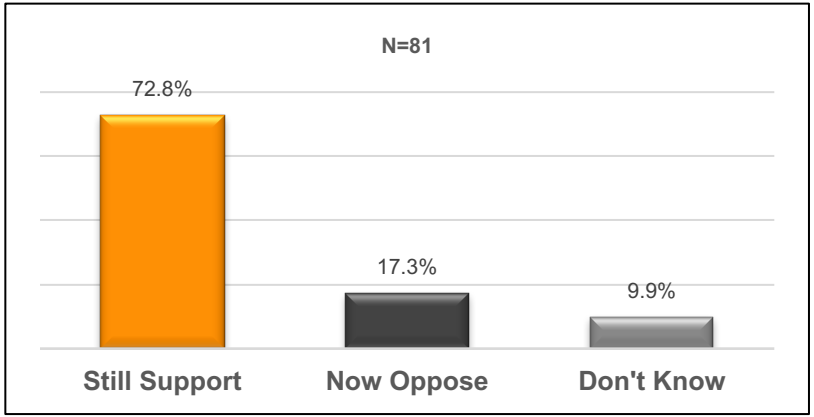
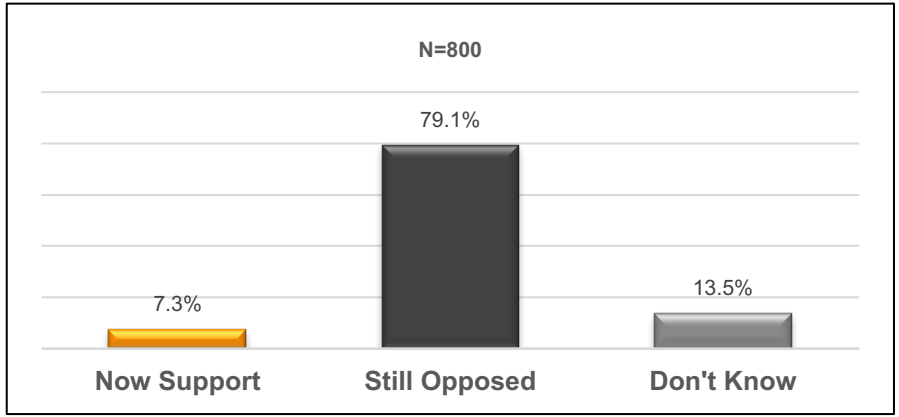


Opposition transcends geographic boundaries and remains equally as strong with those who attend church and those who do not attend.

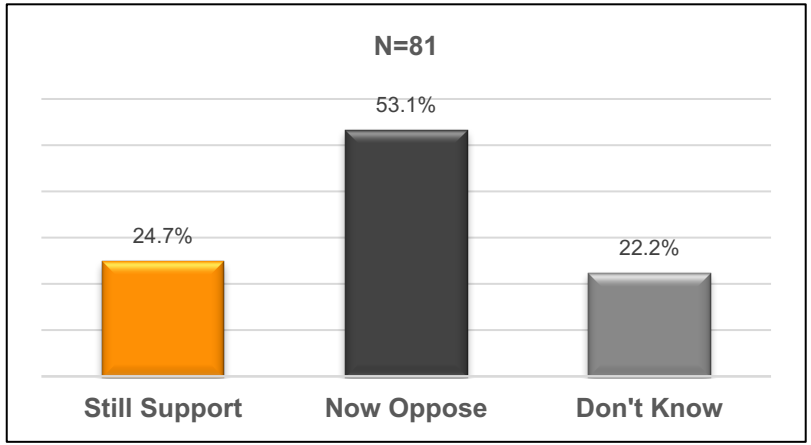
Those who said they supported the cap where then asked the following: Would you still support the distribution cap if you knew that over 90 cents of every sales dollar generated by a North Carolina microbrewery stays in the local community through employee wages, taxes and payments to local vendors and contractors?

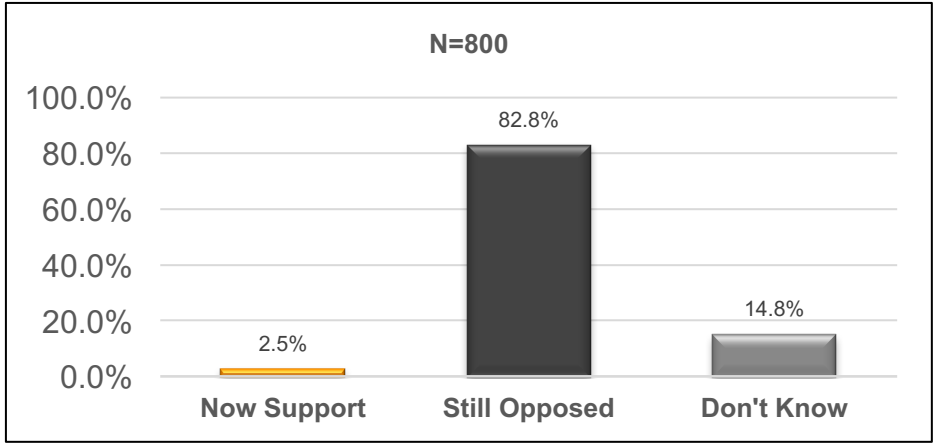




Of those voters who said they supported the production cap, 17.3% said they were opposed to the cap when informed on the economic impact of local breweries.

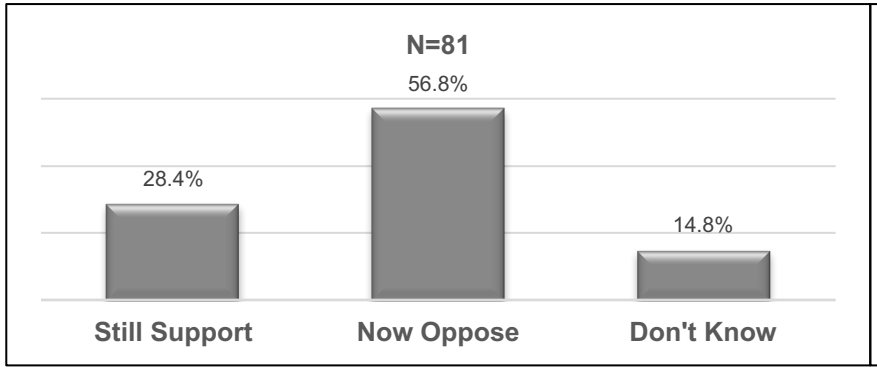
Those who said they supported the cap where then asked the following: Would you still support the distribution cap if you knew microbreweries make up only 4% of all beer sales in the state while the remaining 96% is sold through wholesale distributors who mainly promotes cheaper beer brands like Budweiser, Miller and Coors which are now owned by large foreign corporations?

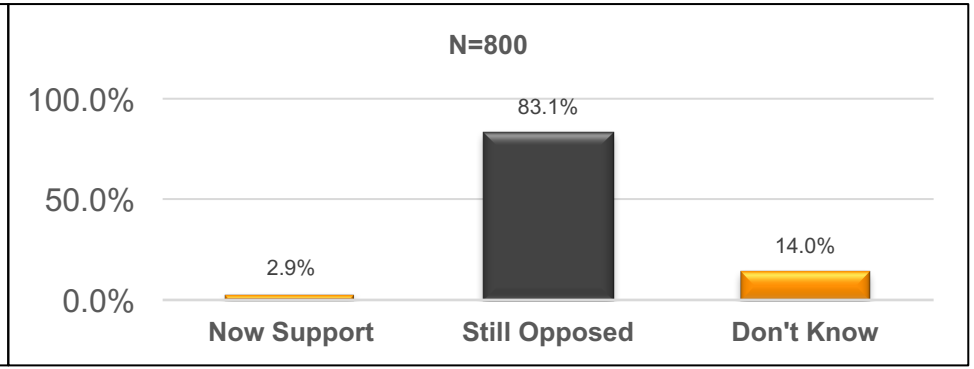




Big versus small and local ownership versus foreign ownership make voters even more likely to be opposed to the production cap of 25,000 barrels. Support for the cap dropped to on 2.5% or all voters which 14.8% now saying they did not know if they were opposed or not.

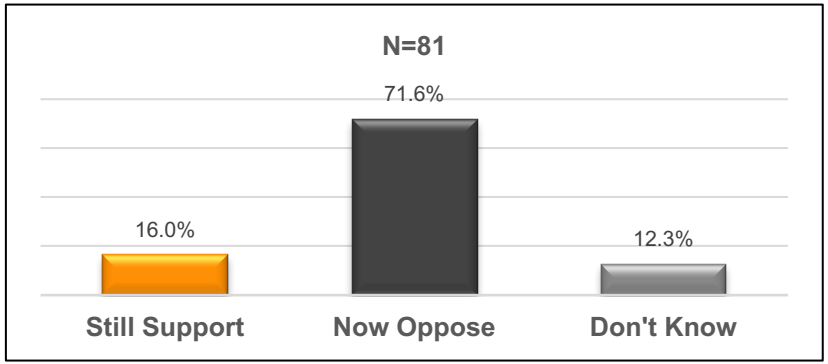
Those who said they supported the cap where then asked the following: Would you still support the production cap on local beer if you knew that wholesale distributors control over 96% of all beer sales in North Carolina and only 25 cents of every sales dollar they collect stays in North Carolina while the remaining 75 cents go to the out-of-state brewery that produced the beer?

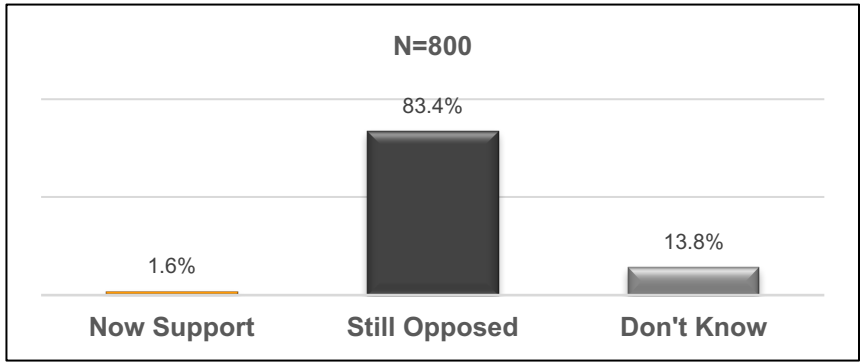




Where the money goes is a factor as well with over half of those voters who originally said they support the production cap now being opposed to the cap when they learn where the majority of the revenue generated and sold by the wholesale distributors finally ends up in out-of-state breweries.

Those who said they supported the cap where then asked the following: Would you still support the distribution cap if you knew that once a small brewery exceeds the cap, a private wholesaler, who did not share in any of the cost, risk or ownership of the microbrewery, will now get complete ownership of the brewery's brand and control of how and that brewery's products is sold without regard to any wishes or input from the owner of the brewery?





When informed of the impact the distribution cap has to the owners of successful microbreweries, support for maintaining the cap completely collapses. Only 1.6% of of those who said they initially supported the cap still supported the cap. This universe of voters was composed of 2 Republican voters, 3 Unaffiliated voters and 8 Democratic voters.

Key Findings

- Voters are in favor of the state legislature enacting regulatory changes to help the microbrewery industry grow in North Carolina.
- Removing the production cap is not an issue about alcohol or beer – it is an issue about fairness and free-market principles.
- It is an issue overwhelming supported by Republicans, Democrats and Unaffiliated voters.
- 76.7% of voters 65 or older oppose the production cap compared to 73.2% of voters 18-25 years of age. Voters 41-54 were 83.3% opposed as well as voters 26-40 who were 82.1% opposed to the production cap.

Key Findings

- The more voters learn about the impact of the production cap on NC breweries, support for the production cap nearly completely vanishes.
- Removing the cap is an issue that Trump voters and Clinton voters both agree on.
- When voters are informed that 96% of NC beer distributed by wholesalers are cheaper beer brands like Budweiser, Miller and Coors which are now owned by large foreign corporations, support for the production cap nearly vanishes among North Carolina voters.

Key Findings

- Furthermore, when the voters who favor the production cap learn that producers lose their brand and marketing rights, support for the cap diminishes to 1.6%, 2 Republicans, 3 Unaffiliated voters and 8 Democrats from the 800 voters surveyed.
- Equal to the fairness issue is the issue of foreign owned versus home grown microbreweries. Lawmakers who support the production cap are taking a pro-foreign big beer stand over local homegrown business owners.
- Fairness and supporting free-market principles transcends social conservative concerns about beer. If a production cap is to exist, then they would most likely favor that cap on foreign beer interests as well.