

DRUG ENFORCEMENT AND POLICY CENTER

OHIO'S MEDICAL MARIJUANA CONTROL PROGRAM

Online Survey
of Consumer Satisfaction

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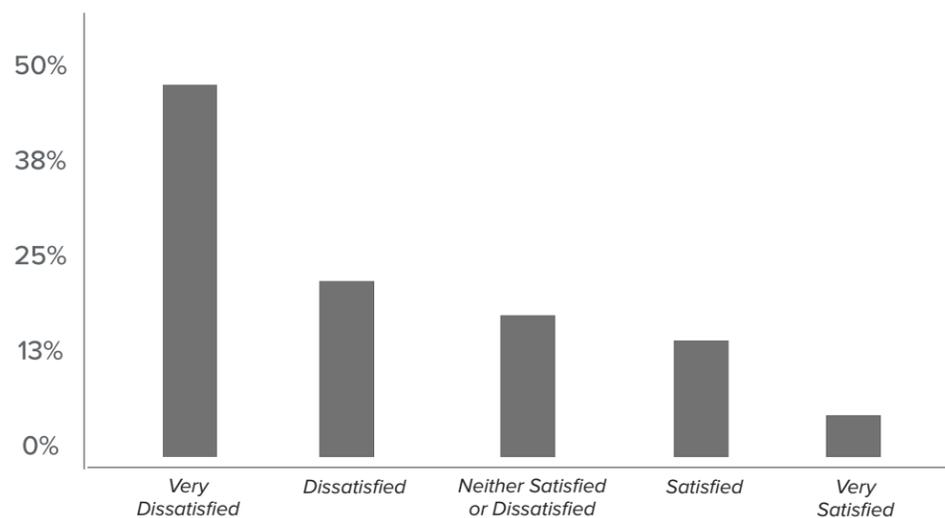
Medical marijuana became legal in Ohio on September 8, 2016 when House Bill 523 (HB 523) became effective. This bill created the framework for Ohio's Medical Marijuana Control Program (MMCP), and the architects of HB 523 promised the program would be "fully operational" within two years. But as of July 2019, less than half of the promised dispensaries are open, and there have been widespread concerns about persistent delays and the overall functionality of Ohio's MMCP.

As the MMCP continues its slow rollout, the perceived effectiveness and success of the current system among consumers may shape the long-term fate of the program. Yet, to our knowledge, there has been no concerted effort to survey consumers and potential consumers to evaluate their experiences and satisfaction with the MMCP to date. This report, based on a recently conducted online survey, attempts to fill in a critical gap in our understanding of developments in Ohio and to evaluate how the people potentially impacted by the current regime perceive its performance thus far. Doing so allows for a unique examination into the efficacy of the structure of Ohio's Medical Marijuana Control Program and how this state's initial experience with marijuana reform can inform the larger national conversation that is currently underway.

SUMMARY AND KEY FINDINGS

An online survey of more than 600 Ohioans, most of whom reported being regular users of marijuana, revealed immense dissatisfaction with the Ohio medical marijuana system. Consumers were surveyed on a range of topics, from their marijuana consumption habits to their experience with the Ohio MMCP. The price of medical marijuana in Ohio was the primary driver of consumer dissatisfaction. Contributing to this dissatisfaction was also reported inconvenience of registering for the program and traveling the sometimes-significant distance to the nearest dispensary. The vast majority of respondents stated that they preferred to purchase marijuana from medical dispensaries, but reported that Ohio's existing medical marijuana regime presented significant barriers that deterred them from doing so.

Satisfaction Levels with Ohio's Medical Marijuana Program (Figure 1)



78% of 647 surveyed Ohioans reported a qualifying condition under the medical marijuana program. Most respondents reporting a qualifying condition reported that they had chronic, severe, or intractable pain, which is consistent with the population of Ohio enrolled in its medical marijuana program.¹

81% of the 505 people who reported a qualifying condition also reported that they currently use marijuana.

Only **45%** of the 407 people who reported a qualifying condition and to be currently using marijuana have received a doctor's recommendation under the MMCP.

67% of all 647 respondents reported being "very dissatisfied" or "somewhat dissatisfied" with the Ohio medical marijuana program, with only 16.7% of people reporting being somewhat or very satisfied.

87% of all 647 respondents indicated preference for purchasing marijuana from a legal dispensary if product was similarly priced to product available via the unregulated market.

On average, people were willing to pay a **16.9%** price premium to buy marijuana at legal dispensaries instead of the unregulated market. At current levels, the premium stands at more than 100%.²

INTRODUCTION TO OHIO'S MEDICAL MARIJUANA PROGRAM

On September 8th, 2016, HB 523 went into effect, creating Ohio's Medical Marijuana Control Program. Ohio became the 25th state to enact a comprehensive medical marijuana program, and in doing so, added its name to the growing list of states advancing marijuana reform nationwide.³ Ohio's medical marijuana regime resembles those in other states enacted through the traditional legislative process with fairly strict controls on access to medical marijuana and an elaborate regulatory regime. Home growing is not allowed under HB 523, and all marijuana products are manufactured and sold through state-licensed businesses. Additionally, in order to be eligible to use marijuana legally, all consumers must (1) receive a recommendation from a licensed physician (as of late July 2019, there were 527 doctors in the state who are able to give these recommendations),⁴ and (2) formally register to obtain a card indicating they are able to legally purchase medical marijuana. With respect to the dispensaries selling marijuana products to patients, 56 have been granted provisional licenses, though only 24 have received certificates of operation as of July 2019.⁵ Three years since HB 523 went into effect, and nearly one year after the original deadline of September 8, 2018 for implementation of a functional medical marijuana program, the program is still, by some metrics, in its early stages, with capacity still being built and many potential patients perhaps still waiting for additional doctors to start recommending and for additional dispensaries to open.

It is important to stress this study did not randomly assemble survey participants and thus the survey sample is not entirely representative of the population of Ohio at large. This pilot study created a survey instrument that was distributed through networks of people who are typically supportive of marijuana reform and are more likely than the average Ohioan to use marijuana. Of the people surveyed, 98.9% favored the full legalization of marijuana, while recent polling has showed that roughly 62% of the US population at large supports full legalization.⁶ While this sample is not a perfect representation of the population at large, it provides a useful window into the current view of the Ohio Medical Marijuana Control Program among those most likely interested in, and potentially affected by, the current system. Additionally, with a sample size of 647, the survey is large enough to provide valuable insights.

METHODOLOGY

From June 18th, 2019 to July 5th, 2019, 647 people were surveyed online via a Google Form to gauge consumer sentiments in respect to Ohio's medical marijuana program. This form was promoted and shared on social media, primarily the Facebook page of Harm Reduction Ohio and other groups favorable to legal medical and recreational marijuana.

The survey asked respondents different sets of questions depending on the responses to certain baseline questions. For example, only those who indicated that they had obtained a medical marijuana card were asked if they purchased marijuana from medical dispensaries. (See Appendix for full survey.)

DEMOGRAPHICS

Eligibility for Medical Marijuana

Of the 647 people surveyed, 78% (505 people) reported having a qualifying medical condition as defined by the Ohio MMCP. Of that subset of people who qualify under the current medical marijuana regime, 81% (407 people) reported that they currently use marijuana. And of that qualifying group that uses marijuana (407 people), only 45% have received a doctor's recommendation and completed the registration process to be able to legally purchase medical marijuana.

Qualifying conditions among respondents (Figure 2)

Condition Reported ⁷	Survey - n (%)	Ohio MMCP - n (%)
Pain: either chronic and severe or intractable	349 (69.1%)	25834 (73.5%)
Post-traumatic stress disorder (PTSD)	166 (32.9%)	6193 (17.6%)
Fibromyalgia	92 (18.2%)	4515 (12.8%)
Spinal cord disease or injury	63 (12.5%)	2061 (5.9%)
Inflammatory bowel disease	58 (11.5%)	529 (1.5%)
Traumatic brain injury	29 (5.7%)	755 (2.1%)
Cancer	23 (4.6%)	2690 (7.7%)
Epilepsy or other seizure disorder	20 (4%)	1326 (3.8%)
Glaucoma	15 (3%)	671 (1.9)
Multiple sclerosis (MS)	14 (2.8%)	943 (2.7%)
Ulcerative colitis	14 (2.8%)	455 (1.3%)
Crohn's disease	13 (2.6%)	903 (2.6%)
Hepatitis C	10 (2%)	807 (2.3%)
Tourette's syndrome	5 (1%)	160 (0.5%)
Chronic traumatic encephalopathy	1 (0.2%)	75 (0.2%)

There are 21 medical conditions that make someone eligible to use medical marijuana under the current Ohio MMCP. Only 15 of the eligible conditions were reported by the surveyed people. As shown in Figure 2, this breakdown of conditions mirrors data from the Ohio MMCP at large, suggesting that the medical history of the surveyed group is representative of the larger population of Ohio medical marijuana users.⁸ Only two conditions were represented at significantly higher levels in the surveyed populations – post-traumatic stress disorder and inflammatory bowel disease.

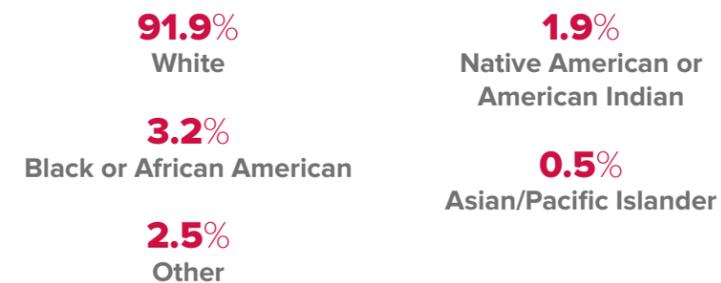
Marijuana Usage

In total, 81% of those with a qualifying condition used marijuana (407 people). Of those, 74% had been using marijuana for over 5 years, while only 7.4% started using within the last year. Additionally, 77% of those who used marijuana reported using marijuana on a daily basis. On the other side, 4.2% reported that they did not use on a regular basis (for the purposes of this survey, not using on a regular basis was defined as using marijuana less than once per month). Unfortunately, we do not have similar information for the Ohio population at large, thus precluding to make judgements about the representativeness of our sample in respect to frequency of marijuana use.

77% of those using marijuana reported using on daily basis

Race

Respondents reported the following racial backgrounds:



With respect to race, the survey population was not representative of Ohio's overall demographic. White Ohioans were overrepresented, while, in particular, Black and African American Ohioans were underrepresented. According to 2018 census data, 13% of Ohioans are Black or African American,⁹ while only 3.2% of those surveyed were. Specific targeting towards Black and African Americans during the latter half of the survey's collection period helped to reduce this underrepresentation slightly, but clearly did not eliminate it.

Ethnicity and Gender

For this survey, 3.5% of respondents reported that they were of Hispanic or Latino ethnicity. This closely mirrors the 3.8% of the population of Ohio who report being of Hispanic or Latino ethnicity.

On gender, 52.5% of respondents were male, 45.3% were female, 0.1% were genderqueer, and 2.1% marked that they preferred not to say.

FINDINGS

The purpose behind this project was to fill a gap in our understanding of patient perspectives on Ohio’s medical marijuana program and how the people potentially impacted by the current regime perceive its performance thus far. Below we present survey findings in respect to people’s overall satisfaction with Ohio’s MMCP and the reasons behind their discontent.

Widespread Discontent

According to the data collected by the online survey, a majority of respondents expressed intense dissatisfaction with the current state of Ohio’s MMCP. Nearly half of respondents (48%) reported being “very dissatisfied” with the program, with another 19% reporting being “somewhat dissatisfied.” Notably, only 3.4% of surveyed people reported being “very satisfied,” with another 13.3% reporting being “somewhat satisfied.” The remaining 16.3% expressed neither dissatisfaction nor satisfaction.

Satisfaction Levels with Ohio's Medical Marijuana Program (Figure 3)

Very dissatisfied	Somewhat dissatisfied	Neither satisfied nor dissatisfied	Somewhat satisfied	Very satisfied
48%	19%	16.3%	13.3%	3.4%
(306)	(121)	(104)	(85)	(22)

The satisfaction levels discussed above remained remarkably consistent across different groups regardless of people’s demographic profile or their level of experience with marijuana. No significant differences existed between males and females, people who use medical marijuana dispensaries as their primary source and people who do not, people who use marijuana every day, as well as people with qualifying conditions who have gotten a medical marijuana card and those who qualify but have not gotten a card. Indeed, the findings among various groups were consistent across all metrics, from their reported overall satisfaction levels to what aspect of purchasing medical marijuana mattered to them the most.

Factors Affecting Satisfaction Levels

The widespread dissatisfaction reported above appears to be primarily driven by two factors: the price of medical marijuana in state-sanctioned dispensaries and the inconvenience of the registration process as well as the distance one must travel to licensed dispensaries. Each of these factors is described in detail in the paragraphs below.

Price

The high price of medical marijuana products was the number one cited reason for people not choosing to purchase their marijuana in a dispensary. Roughly 60% of respondents cited price as a primary reason for avoiding medical dispensaries. On average, respondents said they would be willing to pay an additional 16.9% for marijuana purchased from a medical dispensary, but this is currently far less than the premium being charged. As we can see in Figure 4 below, relative to reported prices on the unregulated market, dispensaries are charging more than a 100% premium, far above the amount respondents indicated they are willing to pay.

Average marijuana price (per gram)¹⁰ (Figure 4)

Ohio dispensaries ¹¹	Ohio unregulated market	Michigan dispensaries ¹²
\$18.47	\$8.23	\$7.94

The significance of price is further established by the self-reported importance of various facets of the marijuana-purchasing process. Among the five factors that were surveyed as important to the consumer (on a five-point scale), price was ranked as the highest overall and by every subgroup that was measured. The averages for those five factors based on all responses are summarized in the table below:

Importance of different factors when purchasing marijuana (Figure 5)

Factor	Importance to Consumer (1-5)
Price	4.74
Product Options	4.48
Convenience	4.43
Concern for Law Enforcement	3.63
Buying from a Specific Seller	3.52

“You have to be rich to afford medical marijuana in Ohio.”

Response to “If legal dispensaries are not your primary source of medical marijuana, what is the primary reason?”
(people could choose from a prewritten list or write their own)

This hierarchy of preferences remained relatively consistent among different groups with one exception. For people who have a qualifying condition but have not tried to get a medical marijuana card, convenience was valued more than product options. This increased value placed on convenience could indicate a higher sensitivity and lower level of toleration for the bureaucratic and sometimes lengthy process of getting a recommendation and applying for a patient card, as well as higher sensitivity to the distance to the nearest dispensary. Figure 6 below provides further detail about the relative importance of various factors across different subgroups of surveyed Ohioans.

Importance of different factors when purchasing marijuana (Figure 6)

Factor	All	Males	Females	Everyday Use	Don't use dispensaries as primary source	Do use dispensaries as primary source	Have qualifying condition, never tried to get card	Have qualifying condition, have a card
Price	4.74	4.79	4.69	4.75	4.84	4.8	4.73	4.8
Product options	4.48	4.43	4.52	4.47	4.39	4.75	4.38	4.65
Convenience	4.43	4.44	4.43	4.48	4.39	4.33	4.50	4.36
Concerns for law enforcement	3.63	3.48	3.89	3.56	3.33	3.59	3.72	3.53
Buying from specific seller	3.52	3.58	3.48	3.48	3.24	3.19	3.72	3.27

Ostensibly, the primary benefit in the mind of most consumers to purchasing marijuana through the regulated market versus the unregulated is that they avoid concerns surrounding law enforcement. However, based on the survey data, this ranks as less important when compared to other purchasing considerations, such as product choice and convenience, and, by an even greater margin, price. This trend held across all groups that were analyzed, with each group ranking price as the most important consideration when purchasing marijuana and concerns for law enforcement ranking, on average, more than 1 point below on a 5-point scale.

Inconvenience

Aside from price, the most commonly cited reasons for not purchasing from medical dispensaries can all be included under a broad category of inconvenience. Almost half of respondents, when asked the question of why legal dispensaries are not their primary source for marijuana, listed that it was simply easier for them to obtain marijuana from other sources. Similarly, half of all respondents listed the cost and difficulty of obtaining a recommendation from a doctor. As of late July 2019, there were only 527 physicians in the state of Ohio who are able to issue recommendations for medical marijuana.¹³ In addition to the cost/difficulty of obtaining a doctor recommendation, other factors that played into people’s decision not to use sanctioned medical marijuana dispensaries as their primary source for medical marijuana included the ease of obtaining marijuana from other sources, distance to the nearest official dispensary, lack of diversity of products, and transportation issues. More detailed breakdown of each factor’s importance is provided in Figure 7 below.

Reasons for medical marijuana not being the respondent’s primary source (Figure 7)

Reason reported (for reasons n > 1) ¹⁴	n (%)
Price of marijuana in dispensaries	174 (59.4%)
Cost/difficulty of obtaining a doctor’s recommendation	147 (50.2%)
It being easier to obtain it from other sources	144 (49.1%)
Distance to nearest dispensary	99 (33.8%)
Lack of diversity of products in dispensaries	60 (20.5%)
Transportation issues	37 (12.6%)
Lack of interest	11 (3.8%)

Based on the data above, it appears that the distance to the nearest dispensary and transportation issues present a serious obstacles to many potential consumers. While the state of Ohio has granted 56 provisional licenses to dispensaries only, 19 had received a certificate of operation and were able to operate at the time the survey began.¹⁵ In reference to the dispensaries that are currently open, one-third of respondents reported living 30 or more miles from the nearest dispensary. Half of this subset of responses indicated that they lived at least 50 miles from the closest dispensary.

CONCLUSION

Ohio's medical marijuana program is in its early days, and it is possible that as more infrastructure is developed, dissatisfaction will diminish. However, it is clear that Ohioans with a history of interest in marijuana and potential qualifying conditions are not satisfied with the current medical marijuana regime. Issues of inconvenience, and even more so, price, have generated broad-based dissatisfaction with the state's program.

This dissatisfaction was expressed by the same group of respondents of which 87% indicated that they would prefer to buy marijuana from state-sanctioned dispensaries rather than unregulated sources if it was "easily accessible and similarly priced." Certainly, this indicates a broad willingness on the part of Ohio's consumers to make the switch to the regulated market, yet, as the survey indicates, problems of high prices and inconvenience are stopping them from doing so.

NOTES

¹ "Ohio Medical Marijuana Control Program Advisory Committee Meeting." Ohio Medical Marijuana Control Program. Last modified June 13, 2019. <https://www.medicalmarijuana.ohio.gov/Documents/advisory-committee/June%202019/MMAC%20Updates%20June%202019.pdf>

² Jackie Borchartt, "Why Are Ohio's Medical Marijuana Prices So High?" Cincinnati Enquirer, January 20, 2019. Prices were identified ranging from \$150-\$300 per ounce, which was standardized based on a price of \$225/oz.

³ Jackie Borchartt, "Gov. John Kasich Signs Medical Marijuana Bill into Law." Cleveland.com. June 09, 2016.

⁴ See Ohio Medical Marijuana Control Program, Program Update: By The Numbers at <https://www.medicalmarijuana.ohio.gov/programupdate>

⁵ Id.

⁶ Hannah Hartig, and A.W. Geiger. "62% of Americans Favor Legalizing Marijuana." Pew Research Center. October 08, 2018.

⁷ Respondents could indicate that they had more than one qualifying condition

⁸ Ohio Medical Marijuana Control Program Update, Advisory Committee Meeting, June 13, 2019. Available at <https://www.medicalmarijuana.ohio.gov/Documents/advisory-committee/June%202019/MMAC%20Updates%20June%202019.pdf>

⁹ United States Census Bureau, July 1, 2018.

¹⁰ Prices for Ohio dispensaries and the unregulated market were reported in various units and quantities of marijuana, which were then standardized to price per gram.

¹¹ As reported by the Ohio Medical Marijuana Control Program, July 8, 2019. The average was calculated by dividing the total product sales by the weight of plant material sold to date.

¹² As reported in press article, Jackie Borchartt, "Why Are Ohio's Medical Marijuana Prices So High?" Cincinnati Enquirer, January 20, 2019. Prices were identified ranging from \$150-\$300 per ounce, which was standardized based on a price of \$225/oz

¹³ Ohio Medical Marijuana Control Program, July 28, 2019.

¹⁴ Among respondents who are eligible to purchase medical marijuana but do not use it as their primary source

¹⁵ Ohio Medical Marijuana Control Program, July 8, 2019.

Medical Marijuana Survey

1. Do you have a condition that makes you eligible to use medical marijuana?

List of Eligible Conditions: <http://bit.ly/2WNI7pp>

Mark only one oval.

- Yes
- No Skip to question 22

Medical Condition for Medical Marijuana

2. What condition makes you eligible? (you can select more than one) *

Check all that apply.

- HIV/AIDS
- Amyotrophic lateral sclerosis (Lou Gehrig's disease)
- Alzheimer's disease
- Cancer
- Chronic traumatic encephalopathy
- Crohn's disease
- Epilepsy or other seizure disorder
- Fibromyalgia
- Glaucoma
- Hepatitis C
- Inflammatory bowel disease
- Multiple sclerosis (MS)
- Pain: either chronic, severe, or intractable (difficult to manage)
- Parkinson's disease
- Post-traumatic stress disorder (PTSD)
- Sickle cell anemia
- Spinal cord disease or injury
- Tourette's syndrome
- Traumatic brain injury
- Ulcerative colitis

Marijuana Usage (baseline)

3. Do you currently use marijuana (in any form)?

Mark only one oval.

- Yes
- No Skip to question 21

Marijuana Usage

4. How long have you been using marijuana?

Mark only one oval.

- Less than a year
- Between 1-2 years
- Between 3-5 years
- Over 5 years

5. On average, how often do you consume marijuana in any form?

Mark only one oval.

- I do not consume marijuana on a regular basis
- Once a month or less
- Once a week
- Twice a week
- Three times a week
- 4-5 times a week
- On a daily basis

6. On average, how often do you consume marijuana in any form?

Mark only one oval.

- Smoking
- Edibles
- Vaping
- Dabbing
- Other: _____

7. When purchasing marijuana, how important is convenience?

Mark only one oval.

- 1 2 3 4 5
- Not at all important Very Important

8. When purchasing marijuana, how important is the price you pay?

Mark only one oval.

Not at all important 1 2 3 4 5 Very Important

9. When purchasing marijuana, how important is it to have different product options?

Mark only one oval.

Not at all important 1 2 3 4 5 Very Important

10. When purchasing marijuana, how important are concerns about law enforcement?

Mark only one oval.

Not at all important 1 2 3 4 5 Very Important

11. When purchasing marijuana, how important is it to you to buy from a specific seller?

Mark only one oval.

Not at all important 1 2 3 4 5 Very Important

12. Have you ever tried to obtain a recommendation from a doctor and register to purchase medical marijuana?

Mark only one oval.

- Yes, and was successful Skip to question 14.
- Yes, but was unsuccessful
- No, never attempted

Conditions Under Consideration

(Anxiety, autism spectrum disorder, opioid use disorder)

13. Do you have a condition that is currently under consideration to be granted eligibility for medical marijuana use?

Mark only one oval.

- Yes, I have anxiety Skip to question 16.
- Yes, I have an autism spectrum disorder Skip to question 16.
- Yes, I have an opioid use disorder Skip to question 16.
- No Skip to question 16

14. Have you ever purchased marijuana from a licensed medical dispensary?

Mark only one oval.

- Yes
- No. Skip to question 16.

Medical Marijuana Frequency

15. Is a medical dispensary your primary source for marijuana?

Mark only one oval.

- Yes Skip to question 17.
- No

Medical Condition for Medical Marijuana

16. If legal dispensaries are not your primary source of medical marijuana, what is the primary reason? (You can choose more than one.)

Check all that apply.

- Lack of diverse products in medical dispensaries
- Price of marijuana in dispensaries
- Cost/difficulty of obtaining doctor's recommendation and registration
- Lack of diverse products in medical dispensaries
- Distance to your nearest dispensary
- Lack of interest
- It is easier for me to obtain it from other sources
- Transportation Issues
- Other: _____

Marijuana Preferences

17. Would you obtain marijuana from a medical dispensary instead of unregulated sellers if it was easily accessible and similarly priced?

Mark only one oval.

- Yes
- No
- Unsure

18. What is the average price you pay now for marijuana in the unregulated market?

19. What is the most you would be willing to pay for legal marijuana from a medical dispensary?

Distance to Dispensary

Link to Map with all Licensed Dispensaries in Ohio - <http://bit.ly/2lpi7wD>

20. How close do you live to your closest medical dispensary?

Mark only one oval.

- 0-5 miles Skip to question 22.
- 5-15 miles Skip to question 22.
- 15-30 miles Skip to question 22.
- 30-50 miles Skip to question 22.
- 50-100 miles Skip to question 22.
- 100+ miles Skip to question 22.
- I do not know Skip to question 22.

Personal Reason to not use Medical Marijuana

21. Please tell us which of the following reasons is preventing you from using medical marijuana? (you can select more than one)

Check all that apply.

- I am not familiar with the plant and am unsure how to use it
- I do not know how to register for the medical marijuana program
- The registration process is too difficult
- I tried to register, but was unsuccessful
- I am having a hard time finding a physician who is willing/able to write me a recommendation
- There are no legal dispensaries close to my home
- I am worried about losing my job
- I am worried about losing my housing
- I am worried about other legal repercussions (custody, violating parole, etc.)
- I am worried about how my doctors would react if they found out I was a medical marijuana patient
- Marijuana is too expensive
- I have moral objections to using marijuana
- I have no interest in using marijuana
- Other: _____

Preferences

22. Do you support the full legalization of marijuana?

Mark only one oval.

- Yes
- No

23. Would you be more likely to buy marijuana through regulated suppliers if it was fully legal?

Mark only one oval.

- Yes, even if it cost somewhat more
- Yes, but only if the cost was the same
- No
- Unsure

24. Overall, how satisfied or dissatisfied are you with the current state of medical marijuana in Ohio?

Mark only one oval.

- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

25. What is your race?

Mark only one oval.

- White
- Black or African American
- Native American or American Indian
- Asian/Pacific Islander
- Other: _____

26. What is your ethnicity?

Mark only one oval.

- Hispanic or Latino
- Not Hispanic or Latino

27. What is your gender?

Mark only one oval.

- Male
- Female
- Prefer not to say
- Other: _____

28. (Optional) Please submit your email if you are willing to be interviewed on the subject. Thank you!

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