



Carlsbad Survey Report

Conducted for the City of Carlsbad

December 2012



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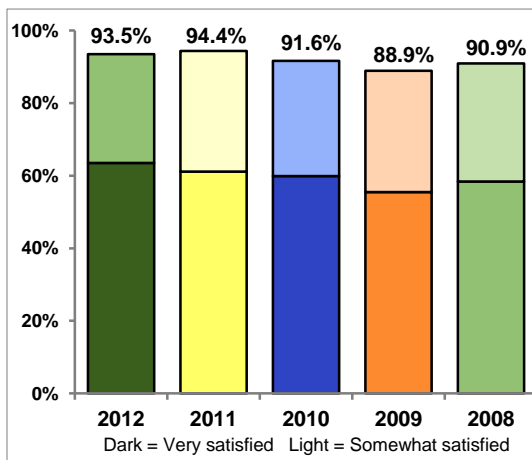
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EXECUTIVE SUMMARY

For the sixth consecutive year, the City of Carlsbad and its performance measurement team partnered with BW Research Partnership, Inc., (BW Research) to conduct its public opinion survey of Carlsbad residents. The main research objectives of the 2012 study were to assess residents' perceptions regarding city services, quality of life, sense of community, neighborhood safety, city government, community values, and city-resident communication in Carlsbad. This report displays five years of survey results.

The city-wide survey of residents was administered by telephone (both landline and mobile) from September 12 through October 8, 2012 and calls averaged 20 minutes in length. A statistically representative sample of 1,001 Carlsbad residents 18 years and older completed the survey, resulting in a maximum margin of error +/- 3.08 percent (at the 95% level of confidence) for questions answered by all 1,001 respondents.

KEY FINDINGS



Ninety-four percent of residents were satisfied with the job the City of Carlsbad is doing to provide city services and 63 percent were very satisfied – the highest percentage reported in any survey year.

When asked about specific services, residents who provided an opinion were most satisfied with the city's efforts to provide library services (97%), maintain city parks (95%), provide trash collection services (95%), provide recycling collection (94%), and provide fire protection and emergency medical services (93%).

Among those who provided an opinion, satisfaction with the city's efforts to provide recycling services reached a new high in 2012. Although overall satisfaction remained unchanged, "very satisfied" increased for the city's efforts to provide library services, maintain city parks, provide trash collection services, provide water services, provide trails and walking paths, and maintain the business climate in Carlsbad.

Satisfaction among those who provided an opinion for the city's efforts to provide local arts and cultural opportunities and provide sewer services was statistically lower in 2012 than at least one other survey year, driven by increases in the percentage of residents who answered "neither satisfied nor dissatisfied."

Quality of Life

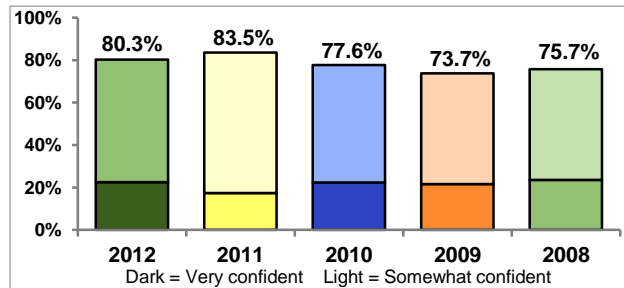
Ninety-seven percent of residents rated their quality of life in the City of Carlsbad as excellent (65%) or good (32%) in 2012. Residents were more positive than in previous years regarding the direction of the quality of life. Twenty-three percent rated the quality of life as getting better, 62 percent viewed it as staying about the same, and only 11 percent felt it was getting worse.

Safety

The overall safety percentages reported by residents in 2012 matched the overall highs from last year and reached new highs for those who felt very safe for both walking alone during the day and after dark in their neighborhoods. An overwhelming 99 percent of residents reported feeling safe walking alone in their neighborhoods during the day (89% very safe) and 90 percent of residents reported feeling safe walking alone in their neighborhoods after dark (56% very safe).

Confidence in City Government

Consistent with the levels reported in 2010 and 2011 and statistically higher than 2008 and 2009, 80 percent of residents indicated confidence in Carlsbad city government to make decisions that positively affect the lives of community members.

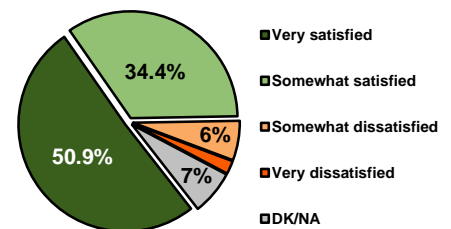


Sense of Community

Based on a seven-question series, 45 percent of residents were classified as having a "high" sense of community. Within the series, Carlsbad residents reported the highest level of agreement with items related to "community values."

City-Resident Communication and Information Sources

Eighty-five percent of residents were satisfied (51% very satisfied) with the city's efforts to provide information to residents through its website, newsletters, water bill inserts, and related sources of information. The most utilized sources for information about city issues, programs, and services were the city's website (72%), flyers that come in the water bill (69%), and the community services and recreation guide (68%).



CONCLUSIONS

The City of Carlsbad is evolving in terms of the issues and concerns that dominate residents' attention. In 2006, just over half of residents identified growth and development as a top concern, followed by almost a third of residents that indicated traffic and roads as their top concern. Six years ago respondents were six times as likely to identify growth and overcrowding as a top concern compared to the quality of schools or six times as likely to talk about traffic and roads as a top concern compared to the cost of living and housing in the city. Today, the landscape of issues that are top of mind to Carlsbad residents has become considerably more diverse.

This year's survey asked all respondents to identify the top issues related to improvement of the quality of life in Carlsbad and not one single issue received over ten percent of responses. The 2006 question related to residents' top concern about the

City of Carlsbad is not directly comparable to this year's question about the number one issue to improve quality of life in the city. However the two questions are indirectly comparable when evaluating the top issues that come to residents' minds when discussing what should be improved in the City of Carlsbad. In 2012, while growth and development (10%) as well as traffic (9%) and infrastructure (7%) remain important to Carlsbad residents, other issues such as improving schools (7%), preserving open space (6%), and increasing or improving police services (4%) are all becoming topics that residents are identifying and discussing as issues they believe the city should focus on in the immediate future.

Community Values

This year's survey tested a new series of questions based on Carlsbad's core values and visions developed through the city's "Envision Carlsbad" visioning process. The survey identified 12 discrete components of the nine core values and vision statements to describe the City of Carlsbad. Each of the 12 discrete components describes qualities or attributes that reveal how Carlsbad is, or what it is striving to be, and respondents were asked to provide their level of agreement with each statement. Of the items that were tested in this section of the survey, the highest level of agreement was found with: "Carlsbad promotes active lifestyles by providing access to trails, parks, beaches, and other recreational opportunities" (95% total agreement among those who provided an opinion), "Carlsbad maintains its beach community character" (90%), and "Carlsbad supports a strong local economy by promoting business diversity and tourism" (87%). The lowest levels of agreement were reported for "Carlsbad is improving access to public transportation" (47%) and "Carlsbad celebrates the city's cultural heritage" (68%).

SATISFACTION WITH CITY SERVICES

Ninety-four percent of residents surveyed in 2012 were satisfied with the job the City of Carlsbad is doing to provide city services.

The overall percentage satisfied was statistically consistent with the percentages



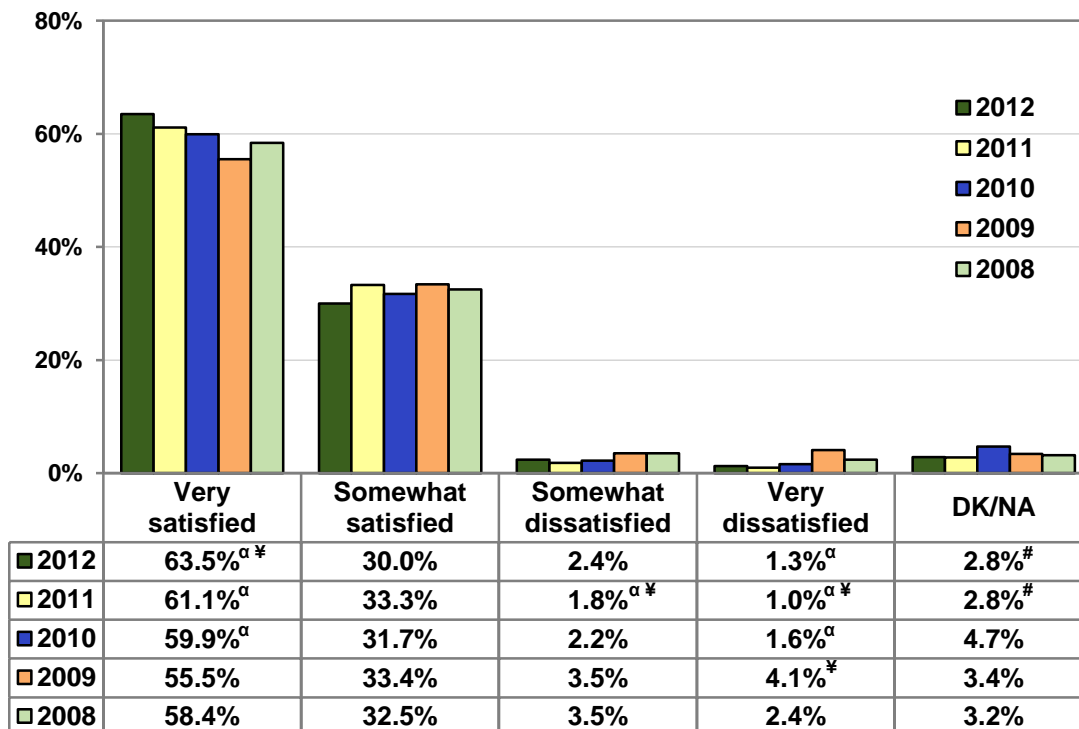
reported over the last two years and higher than 2008 and 2009 (2012: 94%, 2011: 94%, 2010: 92%, 2009: 89%, 2008: 91%).

The percentage of residents "Very satisfied"

with the job the city is doing peaked in 2012, with the percentage statistically higher than 2008 and 2009 (2012: 63%, 2011: 61%, 2010: 60%, 2009: 56%, 2008: 58%)

In 2012, 63 percent of residents were "Very satisfied," 30 percent "Somewhat satisfied," four percent were dissatisfied, and three percent did not know or declined to state their level of satisfaction.

Figure 1: Satisfaction with City Services



€ Statistically significant change from 2011 ($p < .05$) # Statistically significant change from 2010

α Statistically significant change from 2009 ‡ Statistically significant change from 2008

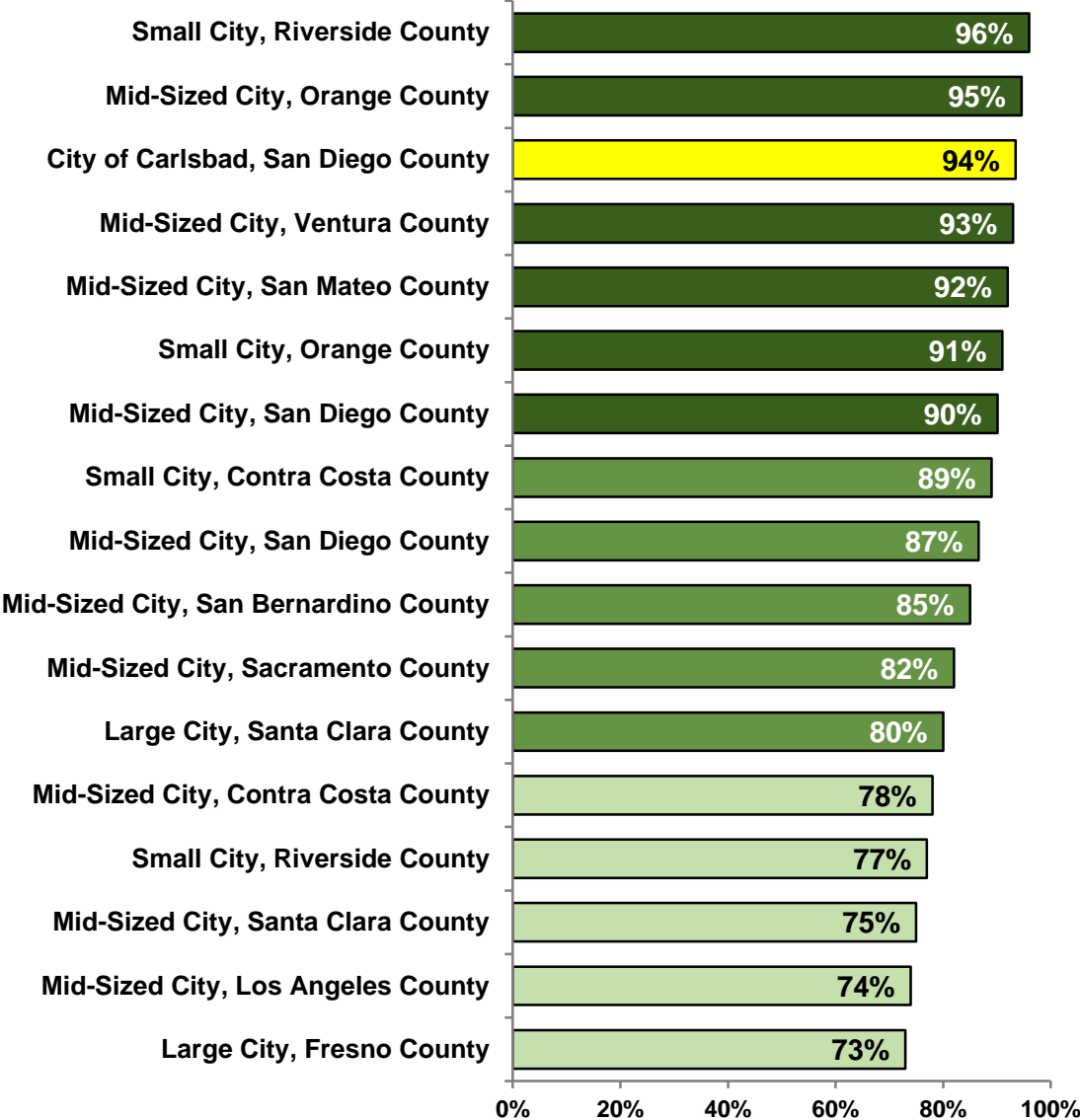
Throughout this report, analyses of responses by resident sub-groups (i.e., cross tabulation data) will be presented in text boxes. The following is an examination of satisfaction with the city's provision of services among sub-groups.

- Residents who were satisfied with the job the city is doing to provide services were more likely to rate other aspects of life in Carlsbad favorably. Resident satisfaction with the job the city is doing to provide services was positively correlated with a number of metrics within the survey, including: quality of life ratings, perceptions regarding the direction of the quality of life, safety in their neighborhoods (both walking alone during the day and night), sense of community, confidence in city government, satisfaction with city-resident communication, and experience visiting the Village.
- A regression analysis revealed the following as the top predictors of satisfaction with the job the city is doing to provide services (in order of influence):
 - Ratings for the quality of life in Carlsbad;
 - Satisfaction with the city's efforts to maintain the business climate in Carlsbad; and
 - Satisfaction with the city's efforts to provide law enforcement services.
- Satisfaction was close to 90 percent or higher for the vast majority of demographic sub-groups and the only statistically significant difference in overall satisfaction was found by zip code. Although still high at 89 percent, residents of zip code 92011 reported lower satisfaction than those in the other three zip codes (92008: 96%, 92009: 93%, 92010: 96%, 92011: 89%).
- Although no overall differences in satisfaction were found for the following sub-groups, their intensity of satisfaction differed.
 - Women were more likely to report being "Very satisfied" with the city's efforts to provide services than men (67% vs. 60%).
 - Residents with two children in the home were less likely to report being "Very satisfied" and more likely to report being "Somewhat satisfied" as compared to those without children, one child, or three or more (No children: 65%, 1 child: 66%, 2 children: 53%, 3 or more children: 73%).
 - Compared with other ethnic groups, Asian residents were more likely to report being "Somewhat satisfied" as compared to "Very satisfied."
 - A higher than average percentage of residents within the La Costa/ La Costa Canyon neighborhood reported being "Very satisfied" (72%), whereas a lower than average percentage in "Rancho La Costa/ La Costa Oaks/ La Costa Ridge" were "Very satisfied" (56%).

SATISFACTION – COMPARISON TO OTHER CITIES

The City of Carlsbad remained in the top tier with regard to residents' satisfaction with the job the city is doing to provide services. The figure below shows the range of satisfaction scores reported by cities throughout California that have conducted comparable studies within the past five years.

Figure 2: Satisfaction with City Services – Comparison to Other Cities¹



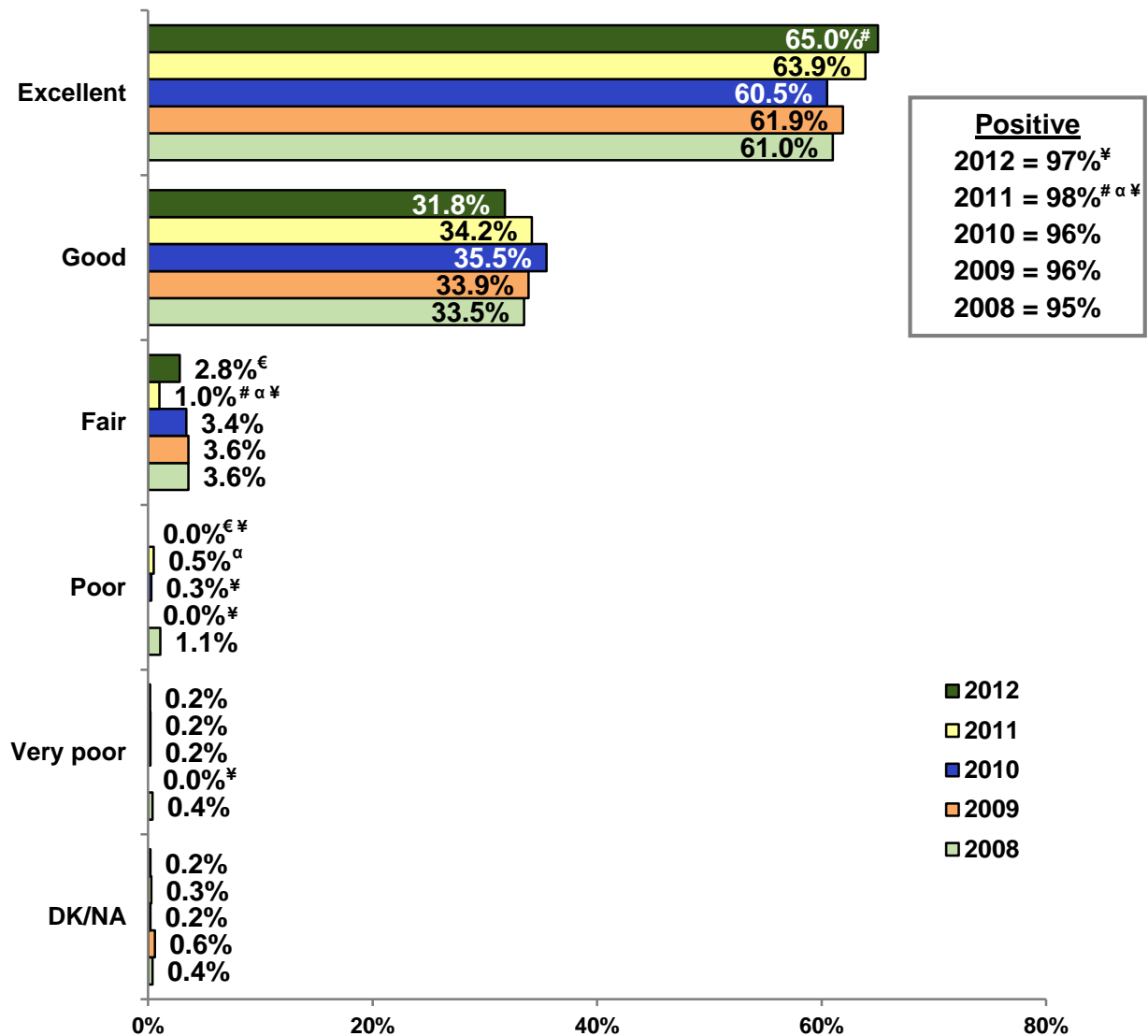
¹ Small cities were defined as those with a total population up to 50,000. Mid-sized cities were those with a population between 50,001 and 150,000. Large cities were those with a population of 150,001 or more.

QUALITY OF LIFE

Ninety-seven percent of residents surveyed in 2012 rated their quality of life in the City of Carlsbad as "Excellent" (65%) or "Good" (32%). Three percent rated it as "Fair" and zero percent provided a negative rating.

The overall positive rating reported in 2012 was statically higher than 2008 and consistent with the percentages reported from 2009 to 2011.

Figure 3: Quality of Life Rating



€ Statistically significant change from 2011 (p<.05)

Statistically significant change from 2010

α Statistically significant change from 2009

* Statistically significant change from 2008

The following is an assessment of quality of life ratings by resident sub-groups.

- Quality of life ratings were positively correlated with a number of other variables throughout the survey, including: perceptions regarding the direction of the quality of life, satisfaction with the job the city is doing to provide services, satisfaction with city-resident communication, sense of community, confidence in city government, safety walking alone in their neighborhood (day and night), and experience visiting Carlsbad's Downtown Village.
- A regression analysis revealed the following as the top predictors of residents' quality of life ratings (in order of influence):
 - Satisfaction with the job the city is doing to provide services;
 - Agreement with the community values item "Carlsbad has a small town, connected feel";
 - Agreement with the sense of community item "If there is a problem in my neighborhood, people who live here can get it solved"; and
 - Agreement with the community values statement "Carlsbad maintains its beach community character".
- Residents who did not visit Carlsbad's Downtown Village in a typical month were less likely than those who typically visited to rate their quality of life in Carlsbad as "Excellent" or "Good" (88% vs. 97%).
- Given the consistently high overall quality of life ratings among sub-groups, the assessment below focuses on differences in "Excellent" ratings.
 - Residents who have lived in Carlsbad for at least 15 years were more likely to rate their quality of life as "Excellent" as compared to those living in the city less than 15 years (71% vs. 62%).
 - Residents living in a single family home (69%) or apartment (65%) were more likely to rate the quality of life as "Excellent" compared with those in a condominium or townhome (53%).
 - A higher than average percentage of residents 18 to 24 years of age rated the quality of life in the city as "Excellent" (74% vs. 65%).
 - Residents in zip code 92008 were the most likely to rate the quality of life in Carlsbad as "Excellent," whereas those in 92010 were more likely to rate it as "Good" (Excellent: 92008: 71%, 92009: 65%, 92010: 59%, 92011: 62%,).
 - A lower than average percentage of Calavera Hills/ Tamarack Point residents rated the quality of life in Carlsbad as "Excellent" (58% vs. 65%).

PERCEIVED DIRECTION

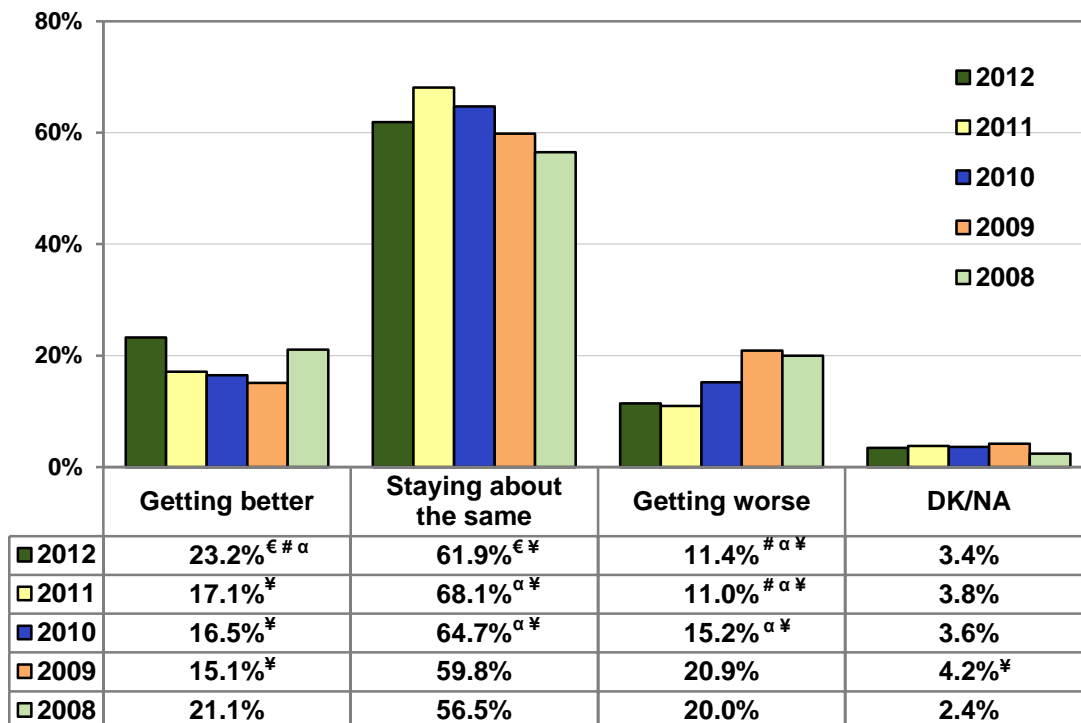
Residents were also asked whether they felt that the quality of life in Carlsbad was getting better, getting worse, or staying about the same.



Residents reported more favorable ratings in 2012 than previous years, with 23 percent rating the quality of life as "Getting better"

(statistically higher than 2009-2011) and only 11 percent indicating that the quality of life was "Getting worse" (statistically lower than 2008-2010). Sixty-two percent of residents surveyed felt that the quality of life in the city was "Staying about the same."

Figure 4: Quality of Life Direction



€ Statistically significant change from 2011 (p<.05) # Statistically significant change from 2010

α Statistically significant change from 2009 ¥ Statistically significant change from 2008

- Higher than average negative perceptions regarding the direction of the quality of life (11% "Getting worse" across all 2012 respondents) were reported among residents that have lived in Carlsbad for 15 or more years (17%), those who lived in zip code 92011 (18%), and those in the South Beach/ Terramar (20%) and Poinsettia/ Aviara (17%) areas.

NUMBER ONE WAY TO IMPROVE QUALITY OF LIFE

All respondents were next asked to identify the number one thing that the City of



Carlsbad could do to improve the quality of life within the community. Asked in an open-ended format, a third of residents did not identify anything² and no single response was cited by more than ten percent of residents.

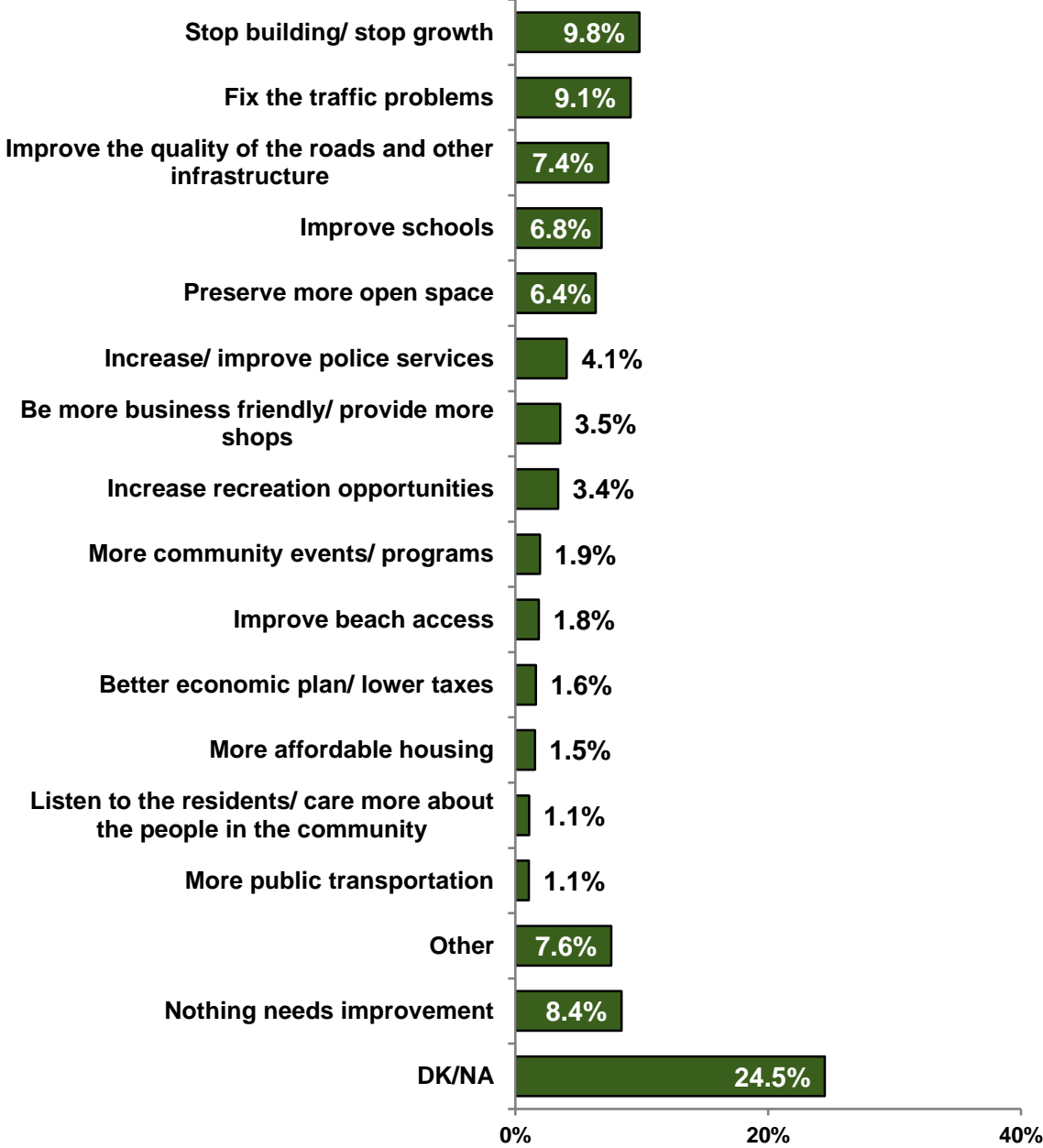
Past surveys only asked this question among the sub-set of respondents who rated the quality of life in the city as "Poor" or "Very poor" or felt it was "Getting worse." When the data were filtered to only examine this sub-set of 115 respondents for 2012, the most frequently cited response among this group was to stop building and growth (29%), followed by "Improve schools" (15%), "Fix the traffic problems" (11%), and "Preserve more open space" (10%).

Each year, the leading suggestion for the number one way to improve the quality of life among this sub-group has been that the city should stop building and growth. Although still in the top position, the percentage citing this response has fallen under 30 percent for the last two years (2012: 29%, 2011: 27%, 2010: 34%, 2009: 37%, 2008: 48%).

Compared to previous years, the percentage of respondents in this sub-set that cited "Improve schools" (2012: 15%, 2011: 6%, 2010: 4%, 2009: 3%, 2008: 6%) and "Preserve more open space" (2012: 10%, 2011: 3%, 2010: 2%, 2009: 3%, 2008: 3%) have both more than doubled.

² Response categories of "Nothing needs improvement" and "DK/NA."

Figure 5: Number One Way to Improve Quality of Life³

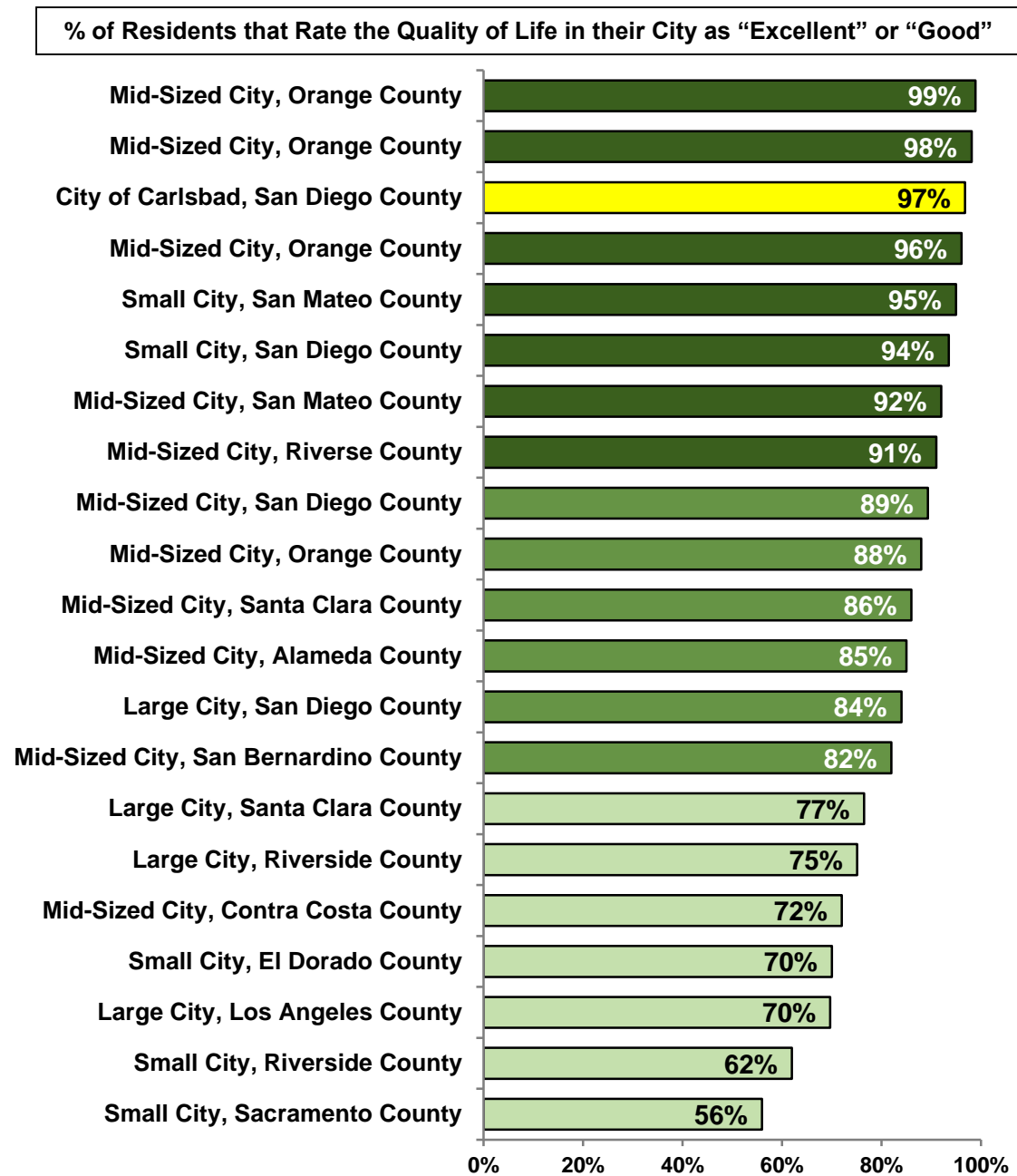


³ Categories with less than one percent were combined into “Other” (see Appendix B for full breakdown).

QUALITY OF LIFE – COMPARISON TO OTHER CITIES

This section displays examples of residents' quality of life ratings from cities that have conducted comparable studies within the past five years. The 97 percent overall quality of life rating provided by Carlsbad residents places the city in the top tier.

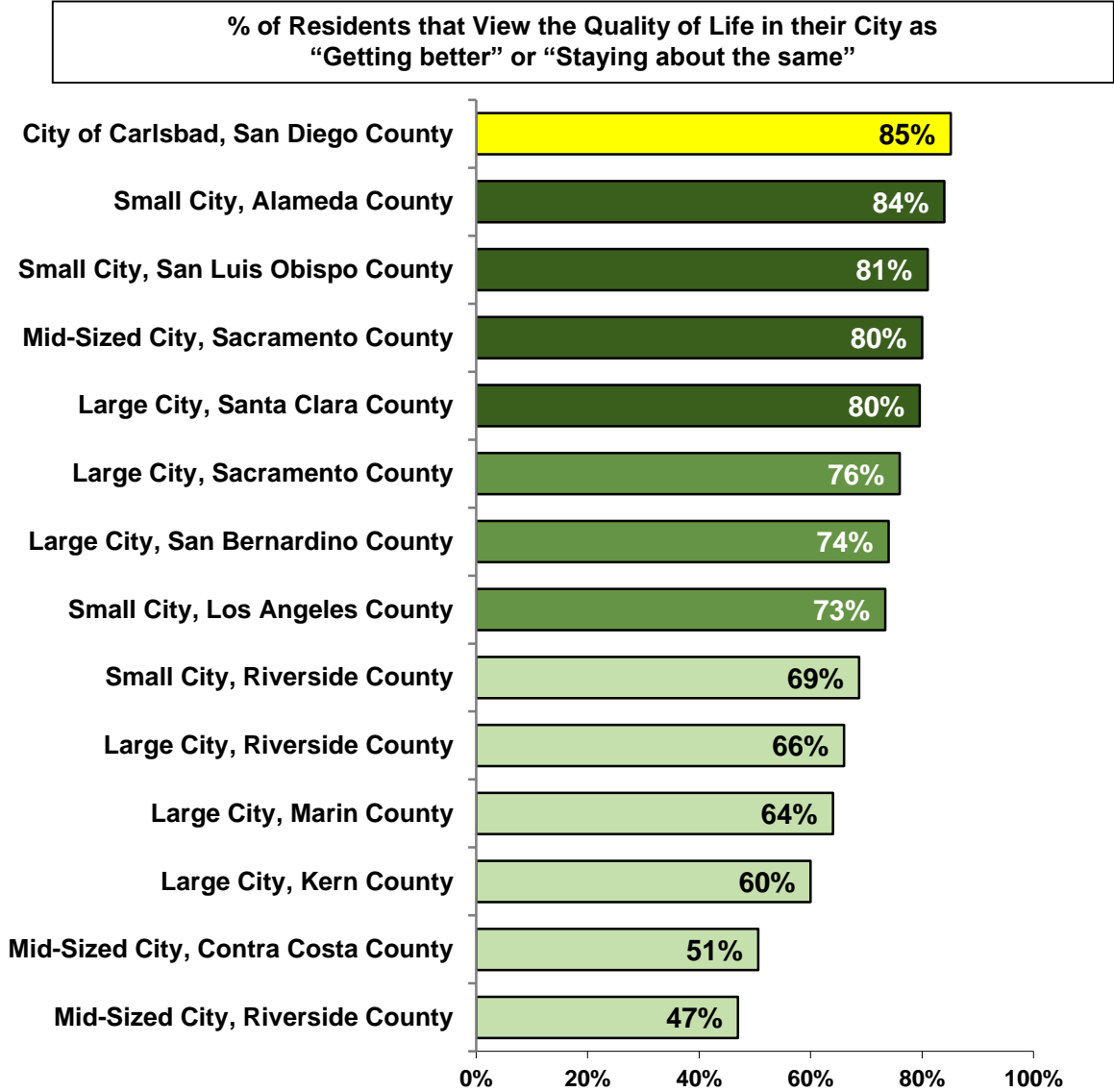
Figure 6: Quality of Life Rating – Comparison to Other Cities⁴



⁴ Small cities were defined as those with a total population up to 50,000. Mid-sized cities were those with a population between 50,001 and 150,000. Large cities were those with a population of 150,001 or more.

The figure below displays the percentage of residents that viewed the quality of life in their city as either “Getting better” or “Staying about the same.” Among comparable research studies from cities throughout California, the combined 85 percent reported by Carlsbad residents places the city at the top of the chart.

Figure 7: Quality of Life Direction – Comparison to Other Cities⁵



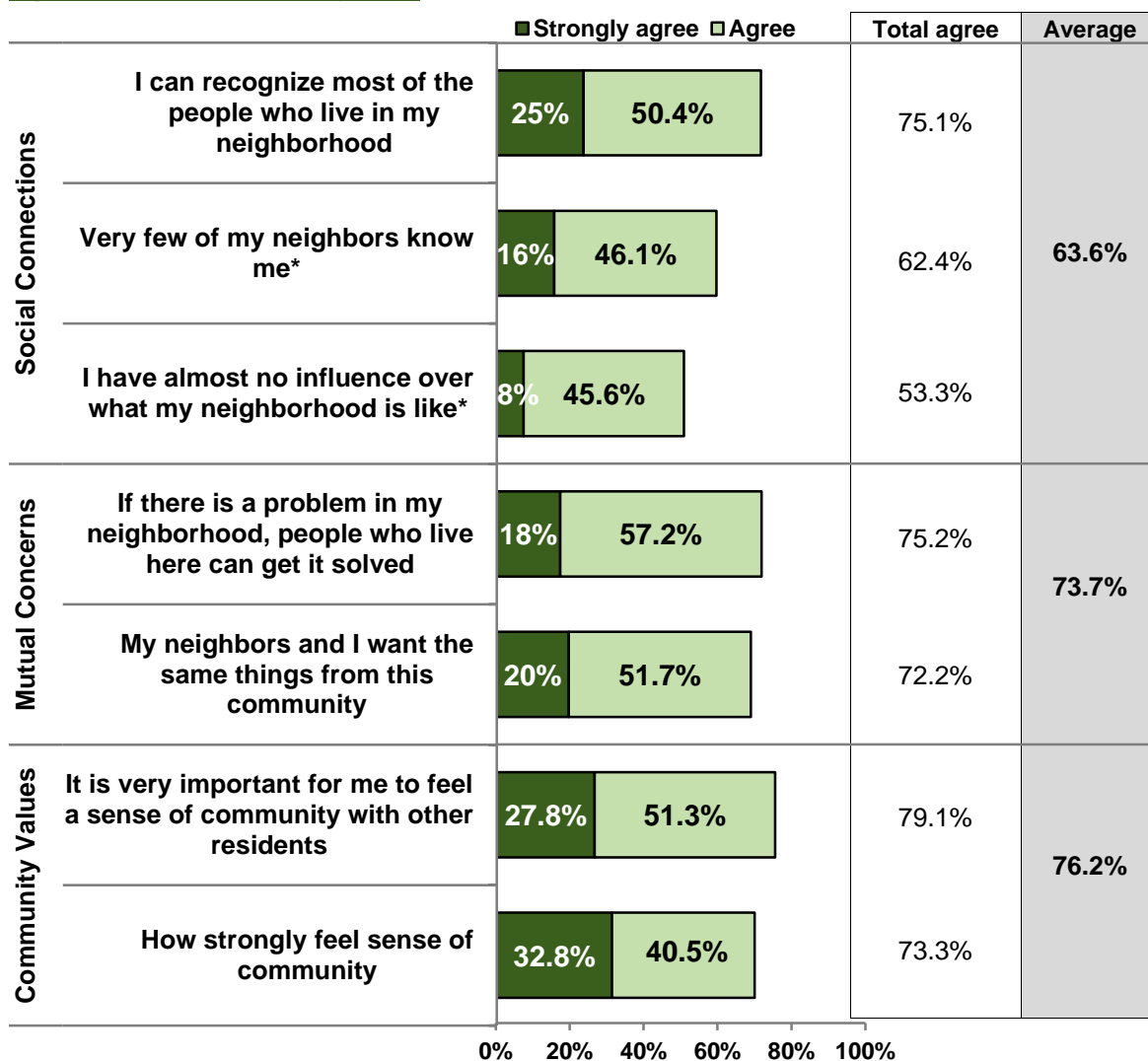
⁵ Small cities were defined as those with a total population up to 50,000. Mid-sized cities were those with a population between 50,001 and 150,000. Large cities were those with a population of 150,001 or more.

SENSE OF COMMUNITY

To assess sense of community among residents, a seven-question series known as the “Brief Sense of Community Index”⁶ was utilized. The series assesses the three underlying dimensions of sense of community: “Social connections,” “Mutual concerns,” and “Community values.”

The figure below displays the questions used to measure sense of community as well as overall agreement with each statement (disagreement for reverse-coded items). Carlsbad residents reported the highest level of agreement with items related to “Community values” (76% average) and “Mutual concerns” (74% average).

Figure 8: Sense of Community Index



* Items reverse coded. Percentage shown is total disagreement. Disagreeing with these statements indicates a higher sense of community.

⁶ Long, D.A. and Perkins, D.D. (2003), “Confirmatory Factor Analysis of the Sense of Community Index and Development of a Brief SCI.” Journal of Community Psychology 33(3): Pages 279 - 296.

In 2012, 45 percent of residents were classified as having a "High" sense of community,



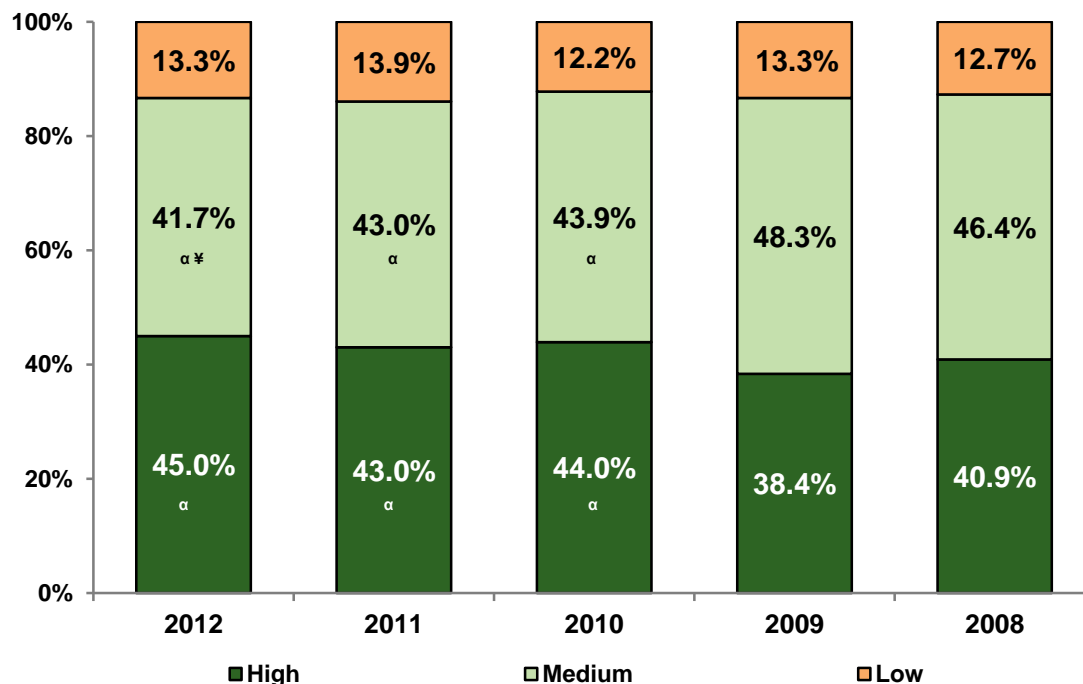
meaning that they agreed with six of the seven items in the series. This percentage was statically higher than 2009, but otherwise consistent with 2008, 2010, and 2011.

Forty-two percent of residents placed in the "Medium" sense

of community group, having agreed with three, four, or five items in the series (consistent with 2010 and 2011 and lower than 2008 and 2009).

Consistent with previous years, 13 percent of residents were classified in the "Low" sense of community group, identifying with fewer than three of the items.

Figure 9: Sense of Community Index Levels



€ Statistically significant change from 2011 (p<.05)

Statistically significant change from 2010

α Statistically significant change from 2009

¥ Statistically significant change from 2008

The following is an examination of sense of community levels by resident sub-groups.

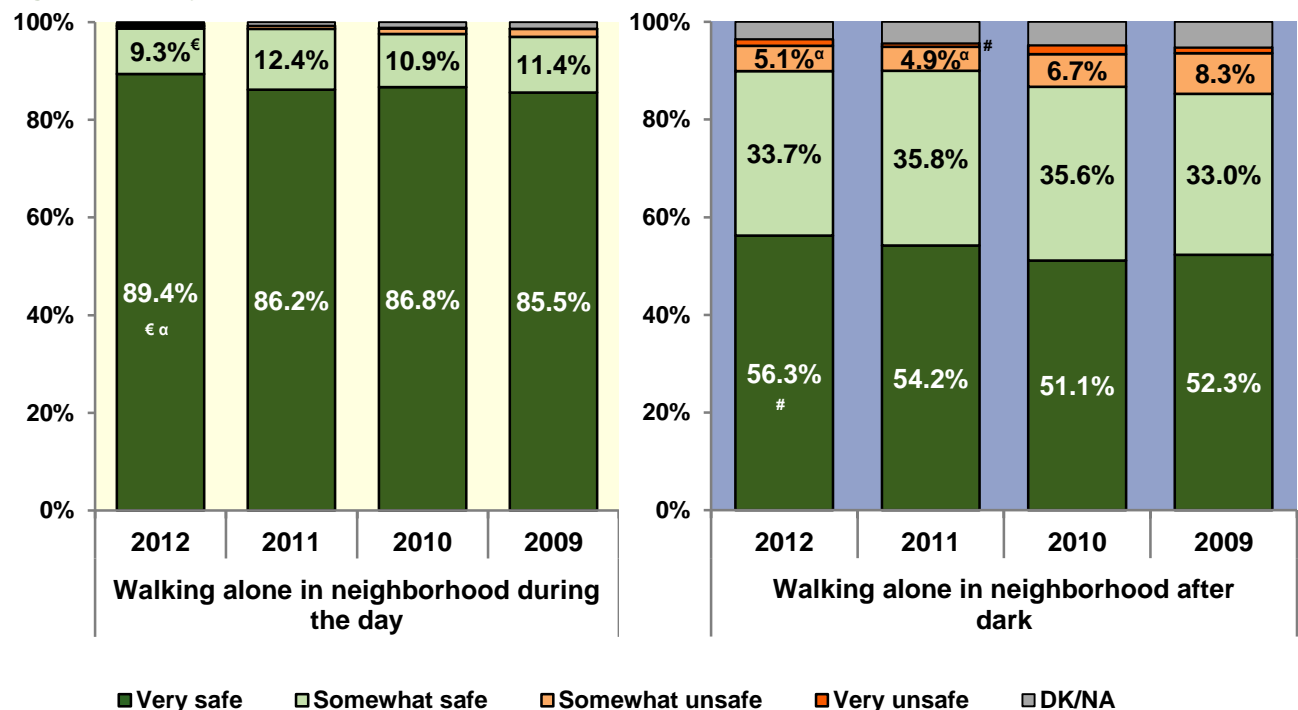
- Sense of community was positively correlated with a number of factors throughout the survey, including: satisfaction with the job the city is doing to provide services, quality of life ratings, perceptions regarding the direction of the quality of life, satisfaction with city-resident communication, feeling safe walking alone in their neighborhoods (during the day and night), confidence in city government, and experience visiting the Carlsbad Village.
- A regression analysis revealed the following as the top predictors of residents' sense of community:
 - Agreement with the community values statement "Carlsbad has a small town, connected feel" and
 - Use of the community services and recreation guide as a source for information on city issues, programs, and services.
- Residents who visited the Carlsbad Village in a typical month were much more likely to be classified as having a "High" sense of community than those who did not visit (46% vs. 25%).
- Close to the majority of residents (49%) who have lived in Carlsbad for at least ten years placed in the "High" sense of community group compared with 40 percent of those who have in the city less than ten years.
- Among the different information sources available to find out about city issues, programs, and services, residents who frequently ("Regularly" or "Sometimes") utilized Patch.com were the most likely to place in the "High" sense of community group.
- Residents who owned their home as well as those living in a single family detached home were more likely to be classified in the "High" group than renters and those living in apartments, condominiums, or townhomes.
- Residents with children in the home were more likely to be classified as having a "High" sense of community than those without children (52% vs. 41%). In addition, a higher percentage of residents with two or more children placed in the "High" group than those with one child (57% vs. 43%).
- Fifty-four percent of residents 35 to 44 years of age placed in the "High" sense of community group compared with 41 percent of residents 18 to 34 years of age and 45 percent of residents 45 years and older.
- Residents in zip code 92009 were more likely than those in other zip codes to be classified as having a "Low" sense of community (92008: 11%, 92009: 18%, 92010: 9%, 92011: 10%).
- A higher than average percentage of residents in the Rancho La Costa/ La Costa Oaks/ La Costa Ridge (20%), Rancho Carillo/ Bressi Ranch/ La Costa Greens (18%), and La Costa/ La Costa Canyon (17%) neighborhoods placed in the "Low" group.

SAFETY

Carlsbad residents continue to feel very safe in their neighborhoods. An overwhelming 99 percent of residents felt safe walking alone in their neighborhoods during the day (89% “Very safe”) and 90 percent of residents felt safe walking alone after dark (56% “Very safe”). One percent of residents reported feeling unsafe walking alone in their neighborhoods during the day and seven percent felt unsafe after dark.

Driven by increases in the percentage who felt “Very safe” for both metrics, the combined safety percentage reported by residents for walking alone in their neighborhoods during the day was statistically higher in 2012 than 2009 (97%) and consistent with the levels reported in 2010 (98%) and 2011 (99%). The combined safety percentage reported by residents for walking alone in their neighborhoods after dark was statistically consistent with 2011 and higher than 2009 and 2010 (2012: 90%, 2011: 90%, 2010: 87%, 2009: 85%).

Figure 10: Safety in Carlsbad⁷



€ Statistically significant change from 2011 (p<.05)

Statistically significant change from 2010

α Statistically significant change from 2009

⁷ Question not asked in 2008. Due to space constraints, the following symbols were omitted from the chart for walking alone in neighborhood during the day: “Somewhat unsafe” was statistically lower in both 2012 and 2011 than 2009, “Very unsafe” was statistically lower in 2012 than 2011, and “DK/NA” was statistically lower in 2012 than 2009.

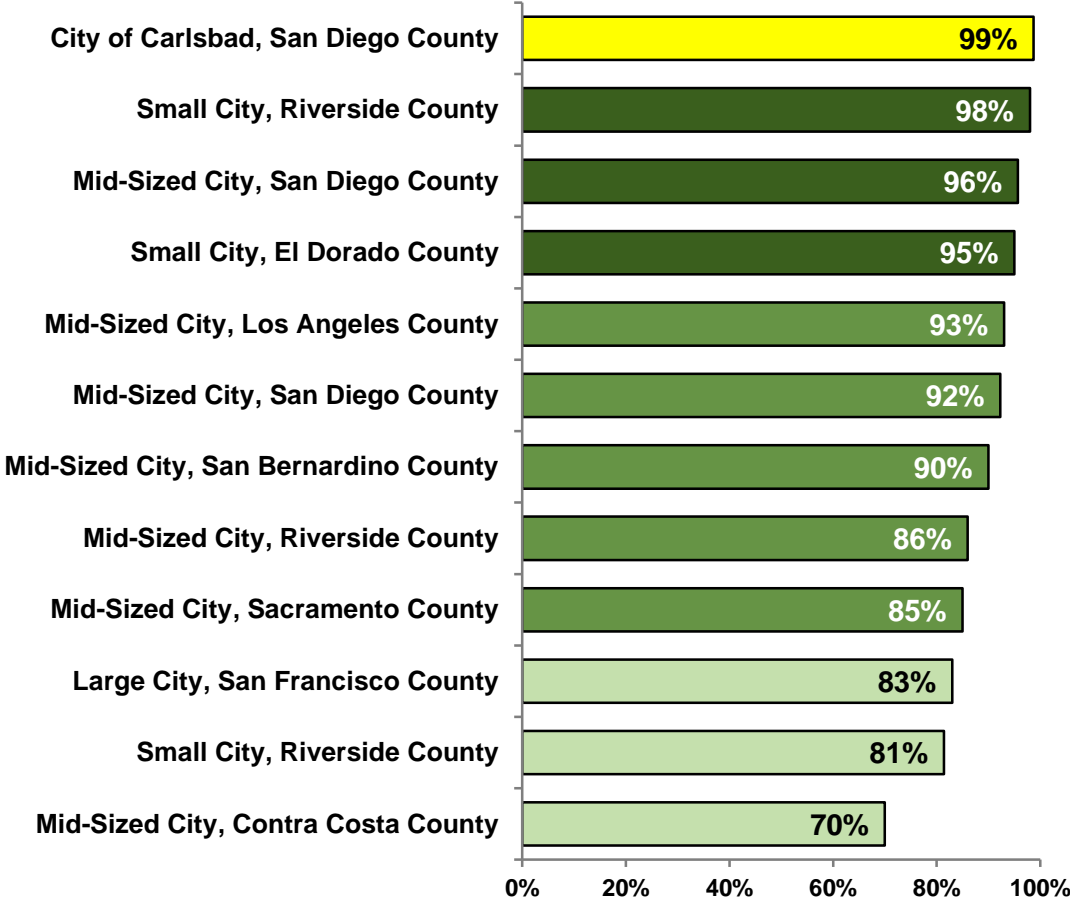


- Safety walking alone in their neighborhoods (during both the day and night) was positively correlated with a number of other metrics within the survey, including: satisfaction with the job the city is doing to provide services, quality of life ratings, sense of community, confidence in city government, satisfaction with city-resident communication, and experience visiting the Village.
- Given the very high percentage of residents that felt safe walking alone in their neighborhoods during the day (and thereby the limited amount of differentiation among sub-groups), the focus of the sub-group analysis below is on safety walking alone after dark.
 - Women were more likely than men to report feeling unsafe walking along in their neighborhoods after dark (10% vs. 3%). Further, 72 percent of men reported feeling "Very safe" compared with 41 percent of women.
 - A higher than average percentage of Asian residents reported feeling unsafe in their neighborhoods after dark (21% vs. 7%).
 - Residents who identified as living in a Carlsbad neighborhood (91%) or gave the name of their homeowners' association as their neighborhood (92%) were much more likely to report feeling safe in their neighborhood after dark than those who did not provide either (82%).
 - A higher than average percentage of residents in the Village/ North Beach/ Barrio area reported feeling unsafe in their neighborhood after dark (15% vs. 7%).

SAFETY – COMPARISON TO OTHER CITIES

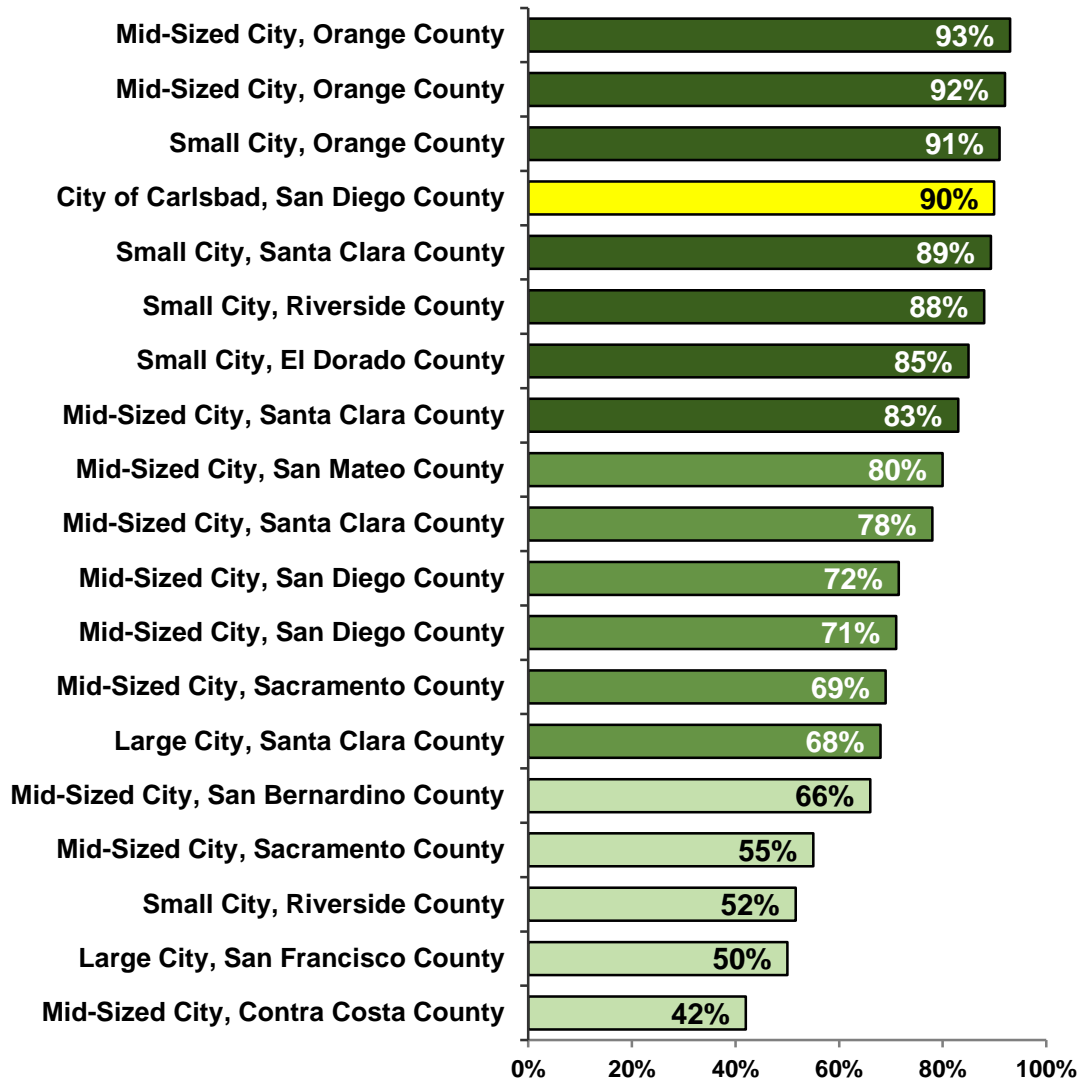
The figure below shows examples of residents’ feelings of safety walking alone in their neighborhoods during the day in cities throughout the state that have conducted comparable studies within the past five years. No city has reported higher than a 99 percent safety rating for this metric.

Figure 11: Safety Walking Alone During the Day – Comparison to Other Cities



Carlsbad remained in the top tier with regard to residents' safety ratings for walking alone in their neighborhoods after dark.

Figure 12: Safety Walking Alone After Dark – Comparison to Other Cities

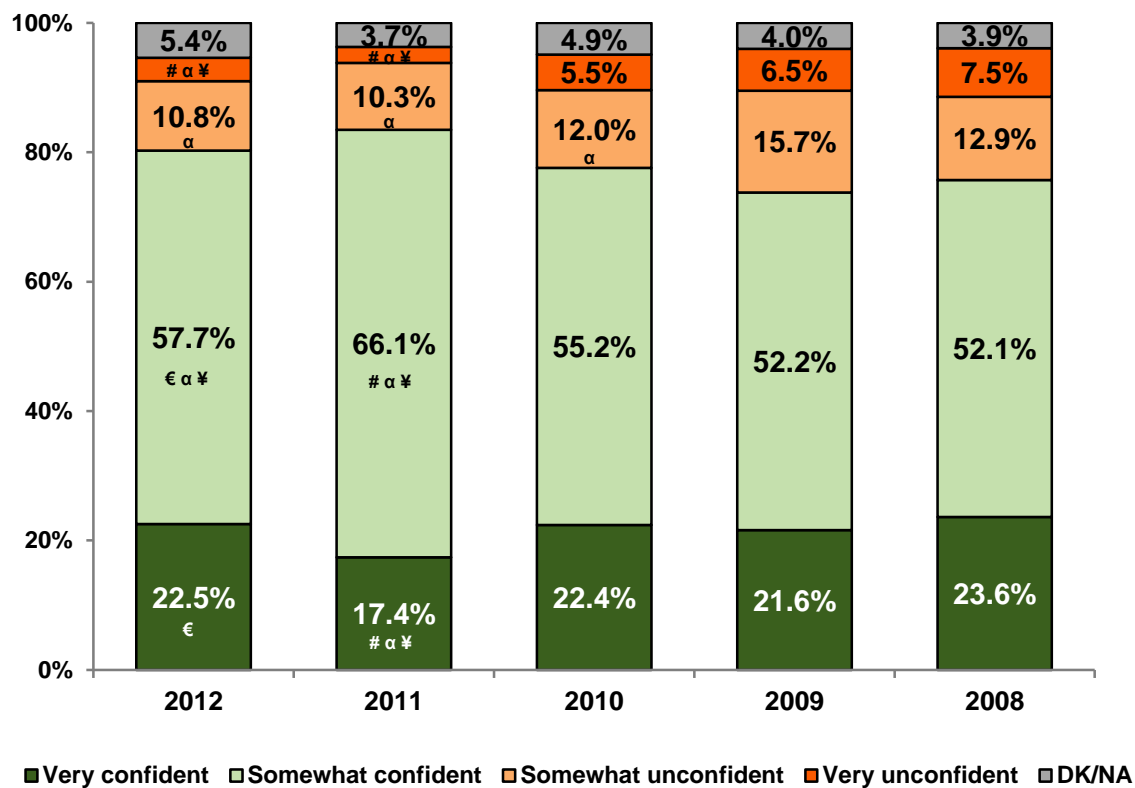


CONFIDENCE IN CITY GOVERNMENT

Consistent with the levels reported in 2010 and 2011 and statistically higher than 2008 and 2009, 80 percent of residents reported confidence in Carlsbad city government to make decisions that positively affect the lives of community members. Fourteen percent of residents reported a lack of confidence and five percent did not know or declined to state.

Although overall confidence remained consistent with last year, the percentage “Very confident” increased (23% vs. 17%), with the 2012 level once again consistent with the levels reported from 2008 to 2010.

Figure 13: Confidence in City Government to Make Decisions



- € Statistically significant change from 2011 (p<.05)
- # Statistically significant change from 2010
- α Statistically significant change from 2009
- ¥ Statistically significant change from 2008



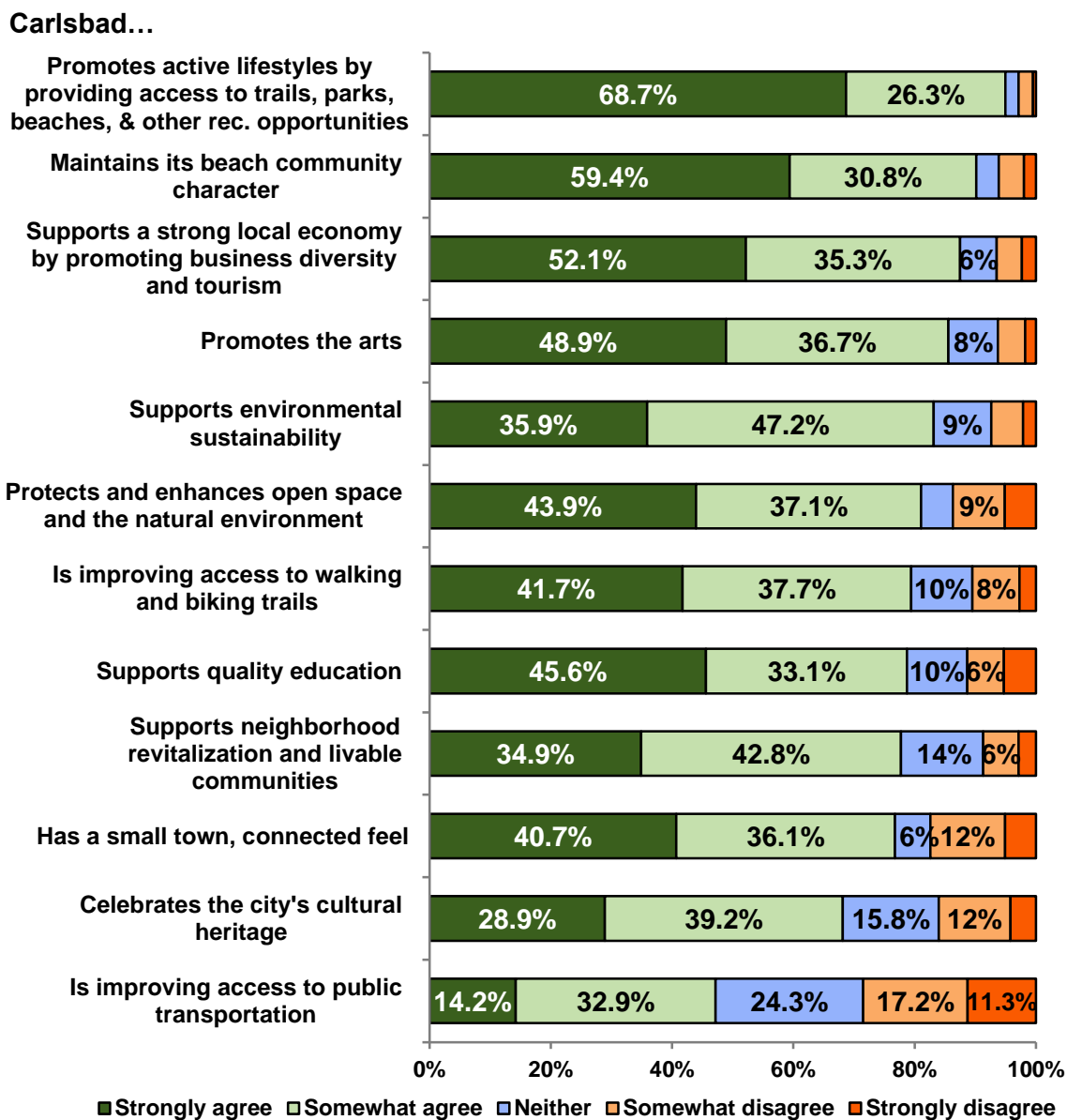
The following is an assessment of confidence in city government by sub-groups.

- Confidence in city government was positively correlated with: residents' views regarding quality of life, direction of the quality of life, sense of community, how safe residents felt walking alone in their neighborhoods (day and night), satisfaction with the job the city is doing to provide services, satisfaction with city-resident communication, and residents' experience visiting Carlsbad's Downtown Village.
- Residents who had communicated with city staff in the past 12 months regarding city business reported less confidence than those who had not contacted the city (Unconfident: 19% vs. 13%).
- Residents who visited the Village in a typical month were more likely to report confidence in city government than those who did not visit (81% vs. 65%).
- Although there was no difference in overall confidence by age group, residents 65 years and older were the most likely to report being "Very confident" in Carlsbad city government to make decisions that positively affect the lives of its community members.
- Similarly, Hispanic or Latino residents were more likely than those in other ethnic groups to report being "Very confident" (no difference in overall confidence).
- Residents of zip codes 92008 (77%) and 92011 (77%) reported lower confidence than those in 92009 (83%) and 92010 (84%).
- Although they represent a small sub-group, 25 percent of respondents in the South Beach/ Terramar area reported a lack of confidence.

COMMUNITY VALUES

New to the 2012 survey, a battery of questions were tested that asked residents their level of agreement with a variety of statements that describe Carlsbad’s vision for the city and specific characteristics or qualities of Carlsbad. With the majority of residents who provided an opinion indicating they “Strongly agree” and between 87 percent and 95 percent total agreement, the top three characteristics were Carlsbad’s active lifestyles, beach community, and strong local economy.

Figure 14: Agreement with Statements about Characteristics of Carlsbad⁸

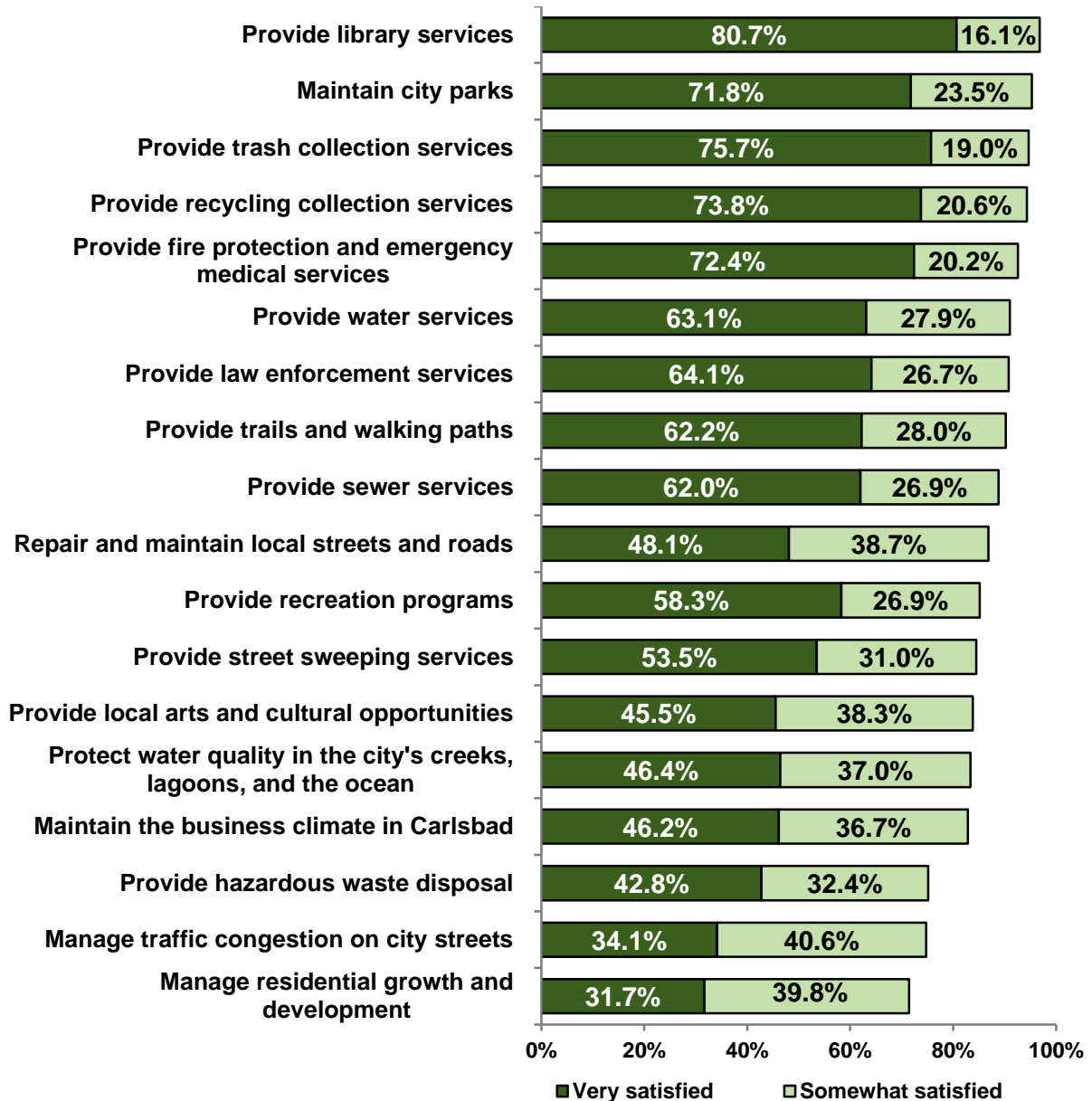


⁸ Due to higher than average percentages of “Don’t know/ no answer” responses for many items, those responses were filtered out of the analysis for this series (see Appendix B for full breakdown of responses).

SATISFACTION WITH SPECIFIC CITY SERVICES

Over 90 percent of residents who provided an opinion were satisfied with the city's efforts to "Provide library services" (97%), "Maintain city parks" (95%), "Provide trash collection services" (95%), "Provide recycling collection" (94%), "Provide fire protection and emergency medical services" (93%), "Provide water services" (91%), "Provide law enforcement services" (91%), and "Provide trails and walking paths" (90%).

Figure 15: Satisfaction with Specific Services⁹



⁹ Due to higher than average percentages of "Don't know/ no answer" responses for many items, those responses were filtered out of the analysis for this series. The high percentages are likely due to residents' lack of direct experience with those specific services (refer to Appendix B for full breakdown of responses).

The table below shows the overall percentage of residents satisfied, neither satisfied nor dissatisfied, and dissatisfied with the city's efforts in each area.

Table 1: Satisfaction with Specific Services

Satisfaction with the city's efforts to...	Satisfied	Neither	Dissatisfied	Satisfaction Rank
Provide library services	96.8%	2.6%	0.6%	1
Maintain city parks	95.3%	2.7%	2.0%	2
Provide trash collection services	94.7%	1.9%	3.4%	3
Provide recycling collection services	94.4%	2.1%	3.5%	4
Provide fire protection and emergency medical services	92.6%	6.1%	1.3%	5
Provide water services	91.0%	4.9%	4.0%	6
Provide law enforcement services	90.8%	3.7%	5.5%	7
Provide trails and walking paths	90.2%	4.5%	5.2%	8
Provide sewer services	88.8%	8.9%	2.3%	9
Repair and maintain local streets and roads	86.9%	2.8%	10.3%	10
Provide recreation programs	85.2%	11.0%	3.9%	11
Provide street sweeping services	84.5%	9.3%	6.1%	12
Provide local arts and cultural opportunities	83.8%	10.4%	5.7%	13
Protect water quality in the city's creeks, lagoons, and the ocean	83.4%	9.7%	6.9%	14
Maintain the business climate in Carlsbad	82.8%	10.8%	6.4%	15
Provide hazardous waste disposal	75.2%	14.3%	10.6%	16
Manage traffic congestion on city streets	74.8%	5.7%	19.6%	17
Manage residential growth and development	71.4%	10.3%	18.2%	18
Average across items	87.0%	6.7%	6.4%	

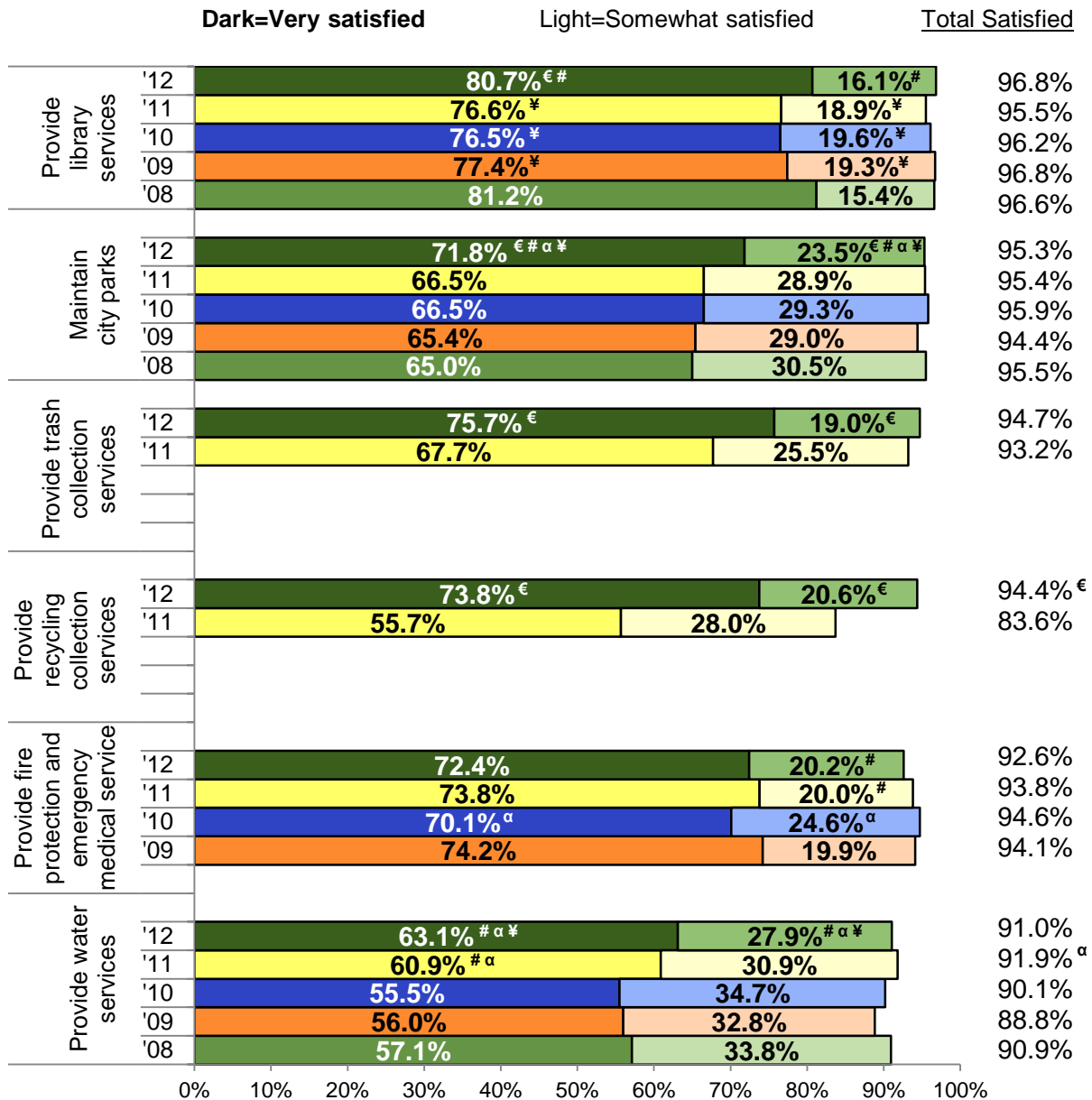
The three charts on the following pages display satisfaction with the city's efforts to provide each service over the past five years.¹⁰ Seven of the 18 services experienced a statistically significant change in total satisfaction in 2012 compared with at least one previous survey year (changes are marked and described in the text).

¹⁰ Only those services with data in 2012 and at least one other year are displayed in the charts. Due to rounding, the percentage "Total satisfied" displayed may not exactly equal the percentage "Very satisfied" plus "Somewhat satisfied."

Driven by an increase in the percentage “Very satisfied” (74% vs. 56%), resident satisfaction with the city’s efforts to “Provide recycling services” was up 11 percentage points from last year among those who provided an opinion.

Although total satisfied remained unchanged, the proportion “Very satisfied” also increased for the city’s efforts to “Provide library services,” “Maintain city parks,” “Provide trash collection services,” and “Provide water services.”

Figure 16: Satisfaction with Specific Services by Year: Part 1



€ Statistically significant change from 2011 (p<.05)

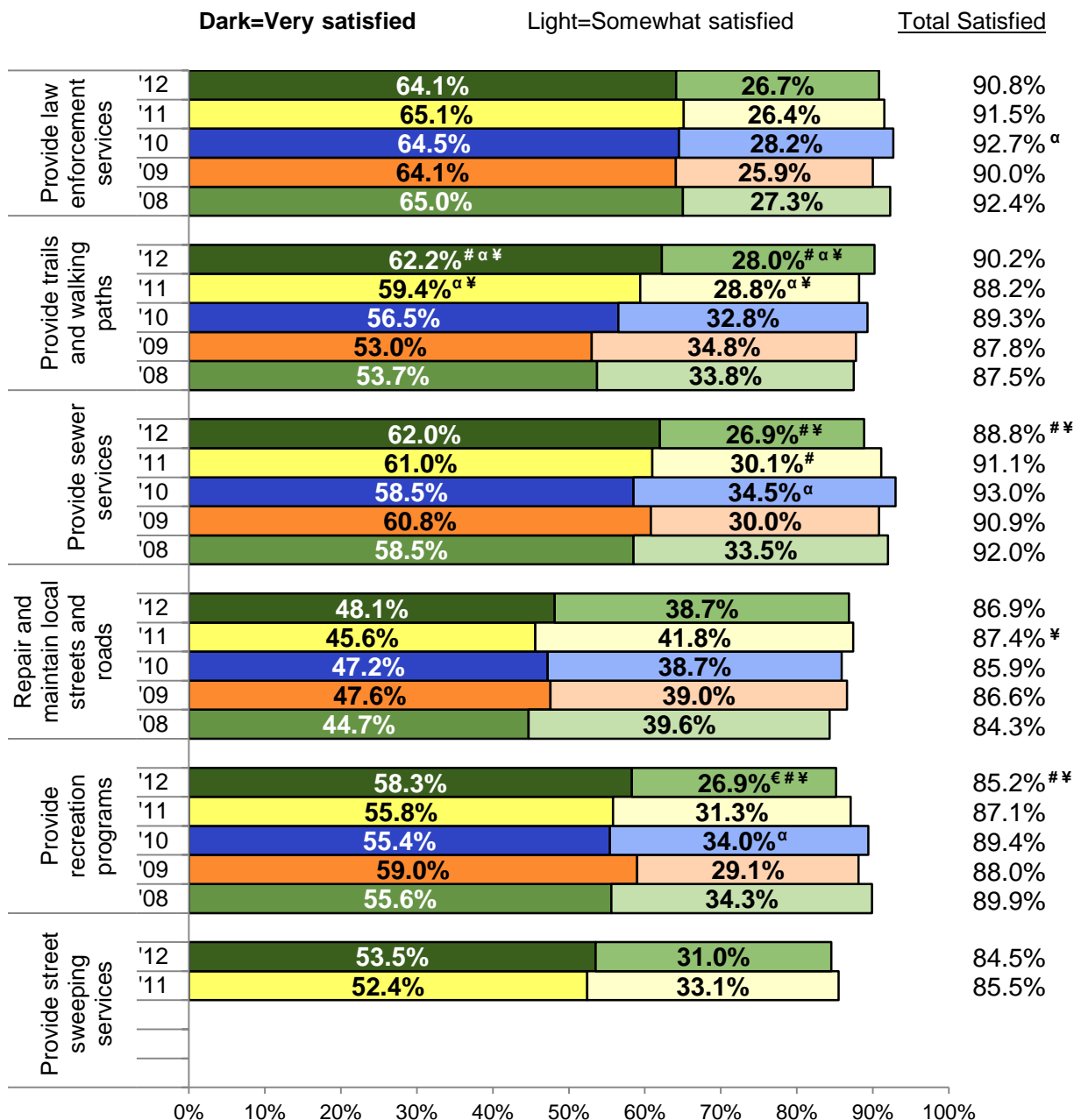
Statistically significant change from 2010

α Statistically significant change from 2009

¥ Statistically significant change from 2008

Among those who provided an opinion, resident satisfaction with the city's efforts to "Provide sewer services" was lower in 2012 than 2010 and 2008 (and consistent with 2011 and 2009), with an increased percentage of residents in the "Neither satisfied nor dissatisfied" category. Conversely, satisfaction with the city's efforts to "Provide recreation programs" was higher in 2012 than 2010 and 2008 (and consistent with 2011 and 2009). Although total satisfaction remained statistically unchanged, residents who provided an opinion were more likely to be "Very satisfied" with the city's effort to "Provide trails and walking paths" in 2012 as compared with 2008 to 2010.

Figure 17: Satisfaction with Specific Services by Year: Part 2

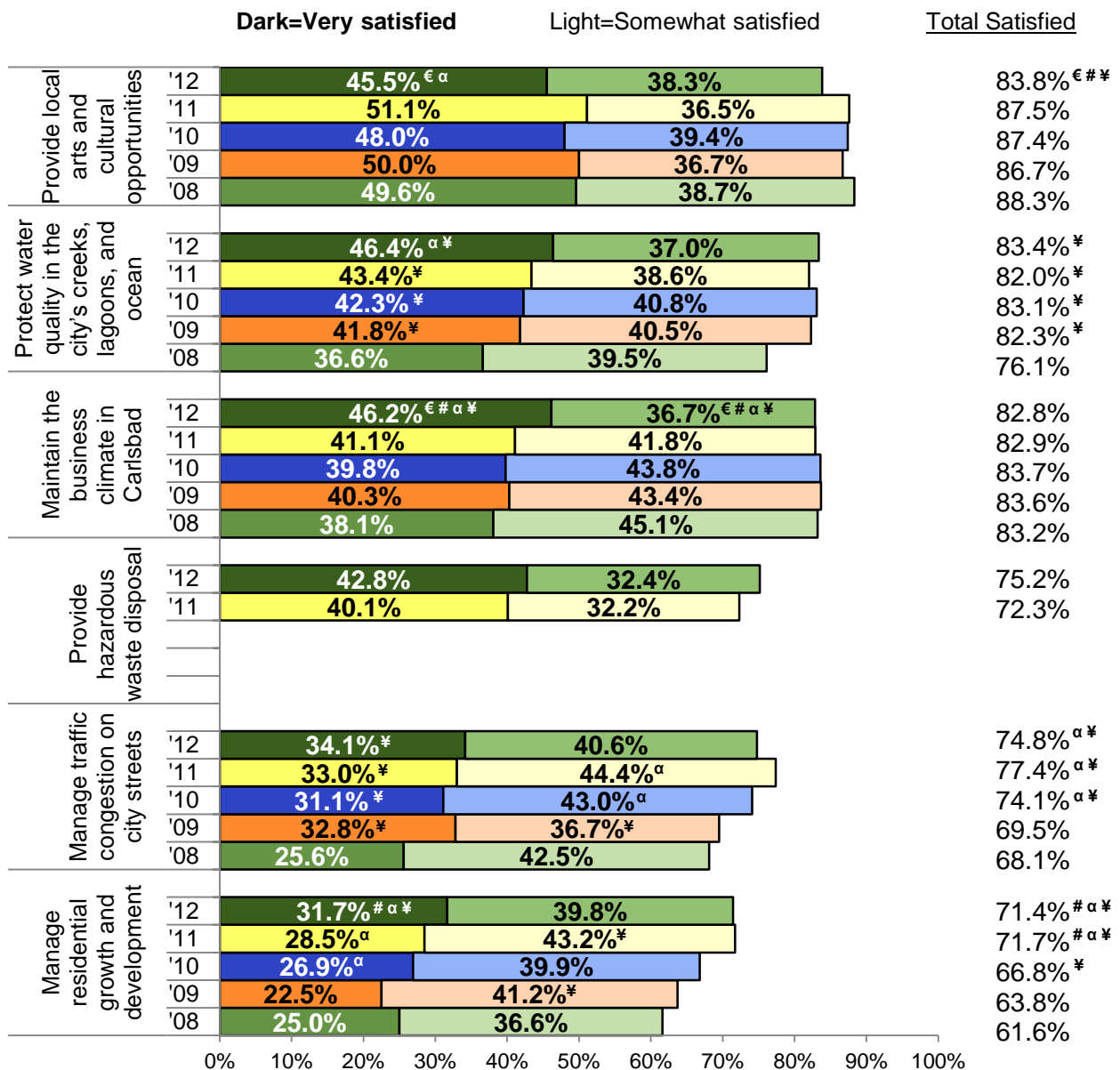


€ Statistically significant change from 2011 (p<.05) # Statistically significant change from 2010

α Statistically significant change from 2009 ‡ Statistically significant change from 2008

Driven by an increase in the percentage “Neither satisfied nor dissatisfied,” satisfaction among those who provided an opinion for the city's efforts to "Provide local arts and cultural opportunities" was statistically lower than 2008, 2010, and 2011. Consistent with previous years, satisfaction among those who provided an opinion for the city's efforts to "Protect water quality in the city's creeks, lagoons, and ocean" was statistically higher than 2008. Satisfaction with the city's efforts to "Manage traffic congestion on city streets" was statistically higher than 2008 and 2009 and "Manage residential growth and development" was higher than 2008 to 2010. Although overall satisfied remained unchanged, the percentage “Very satisfied” with the city’s efforts to “Maintain the business climate in Carlsbad” reached a new high in 2012.

Figure 18: Satisfaction with Specific Services by Year: Part 3



€ Statistically significant change from 2011 (p<.05) # Statistically significant change from 2010

α Statistically significant change from 2009

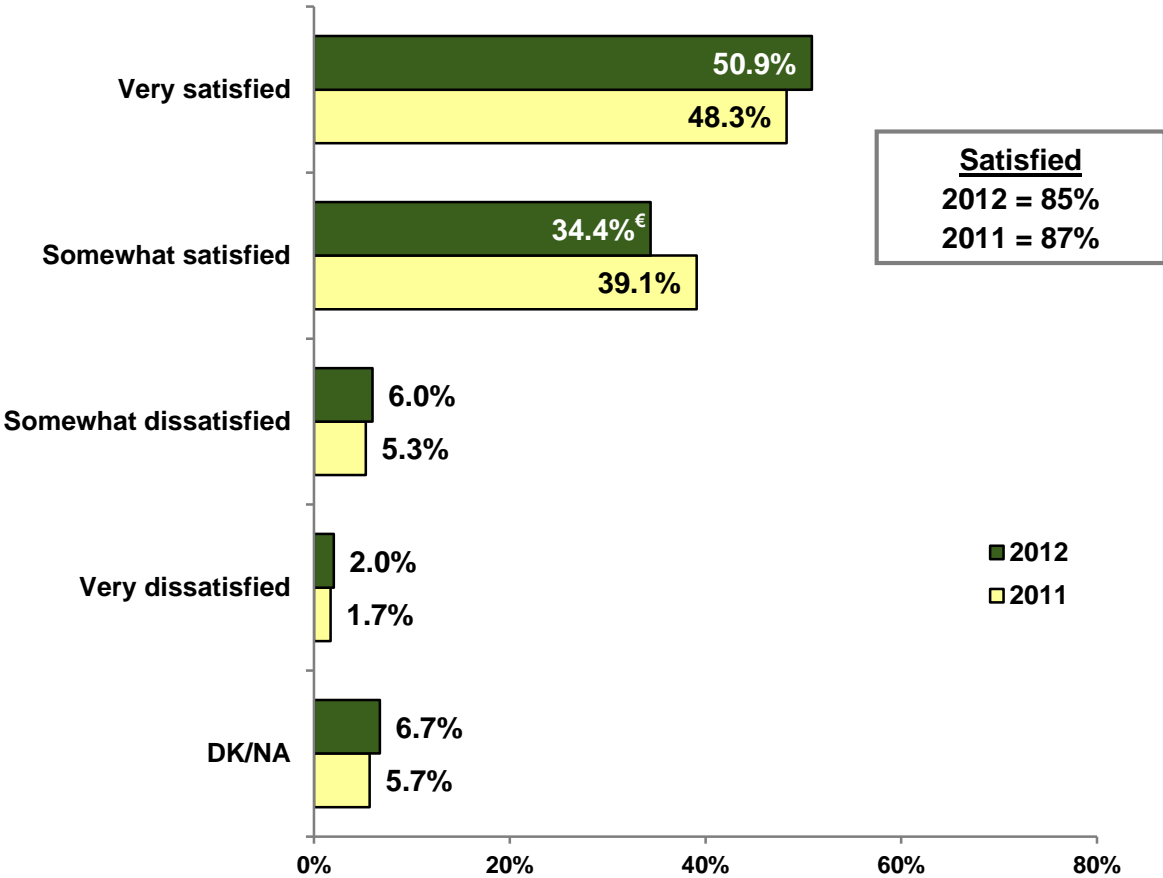
‡ Statistically significant change from 2008

SATISFACTION WITH CITY-RESIDENT COMMUNICATION

With the majority of residents "Very satisfied" (51%), 85 percent reported satisfaction with the city's efforts to provide information to residents through its website, newsletters, water bill inserts, and related sources of information.

Overall satisfaction with city-resident communication remained statistically consistent with last year (85% vs. 87%).

Figure 19: Satisfaction with City-Resident Communication¹¹



[€] Statistically significant change from 2011 (p<.05)

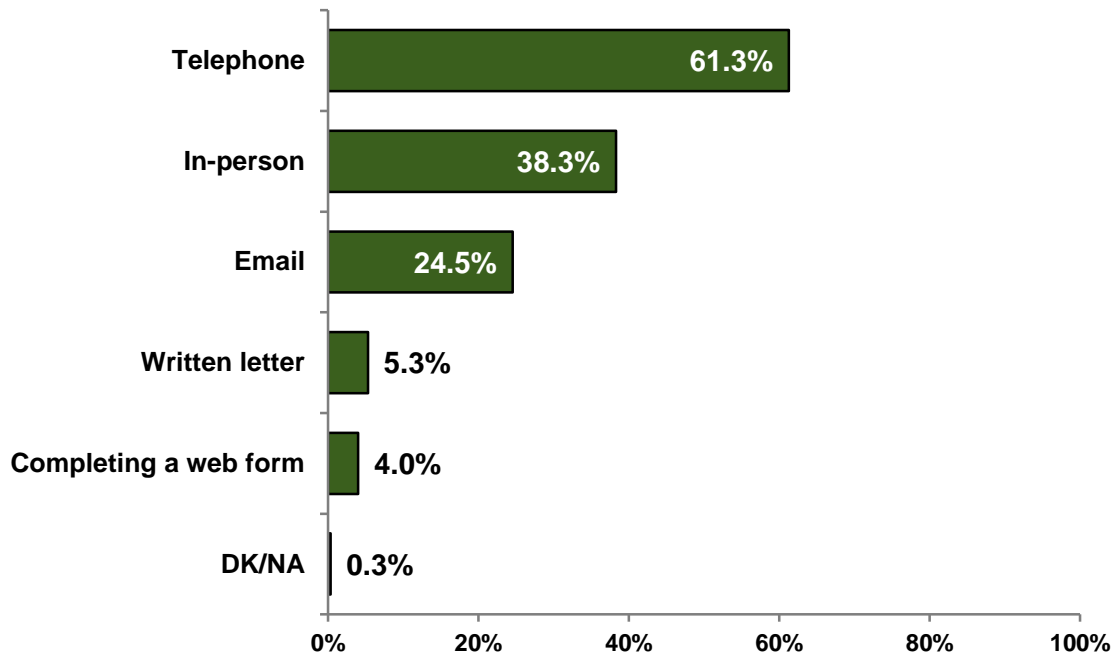
¹¹ Wording of this question changed slightly in 2011. As such, previous years' data are not displayed.

- Satisfaction with city-resident communication was positively correlated with a number of other metrics throughout the survey, including: residents' views on quality of life, perceptions regarding the direction of the quality of life, satisfaction with the job the city is doing to provide services, sense of community, safety walking alone in their neighborhoods (day and night), confidence in city government, and experience visiting the Village.
- Residents who referred to the city website, community services and recreation guide, Carlsbad Currents newsletter, water bill flyers, and flyers at city building for information about city issues, programs, and services reported much higher satisfaction levels than those who never utilized those sources.
- Residents living in single family homes reported higher satisfaction with city-resident communication (88%) than those in apartments (77%) or condominiums or townhomes (81%).
- White/ Caucasian (87%) and Asian (85%) residents reported higher satisfaction with city-resident communication than Hispanic/ Latino respondents (75%) and those identifying with a different ethnic group (78%).
- Although there were no overall differences by zip code, residents of zip code 92008 were the most likely to report being "Very satisfied." Similarly, residents in the Village/ North Beach/ Barrio were the most likely to report being "Very satisfied."

RECENT COMMUNICATION WITH THE CITY OF CARLSBAD

Up from the 21 percent reported in 2011, 29 percent of survey respondents in 2012 have communicated with City of Carlsbad staff on issues related to city business over the past 12 months. Within that group – and consistent with last year – telephone was the most utilized method of contact (61%), followed by in-person (38%) and email communications (25%).

Figure 20: Method of Communication with City Staff (n=288)¹²



- Residents 35 years and older and those who lived in Carlsbad for five years or longer were much more likely than those 18 to 34 years and those who have been in the city less than five years to have communicated with Carlsbad city staff on issues related to city business.
- Residents who owned their home as well as those living in a single family detached home were more likely to have communicated with city staff on issues related to city business than renters and those living in apartments, condominiums, or townhomes.
- The majority of residents (51%) who identified with an ethnic group other than White/ Caucasian, Hispanic/ Latino, or Asian indicated they had communicated with Carlsbad city staff on issues related to city business in the past year.

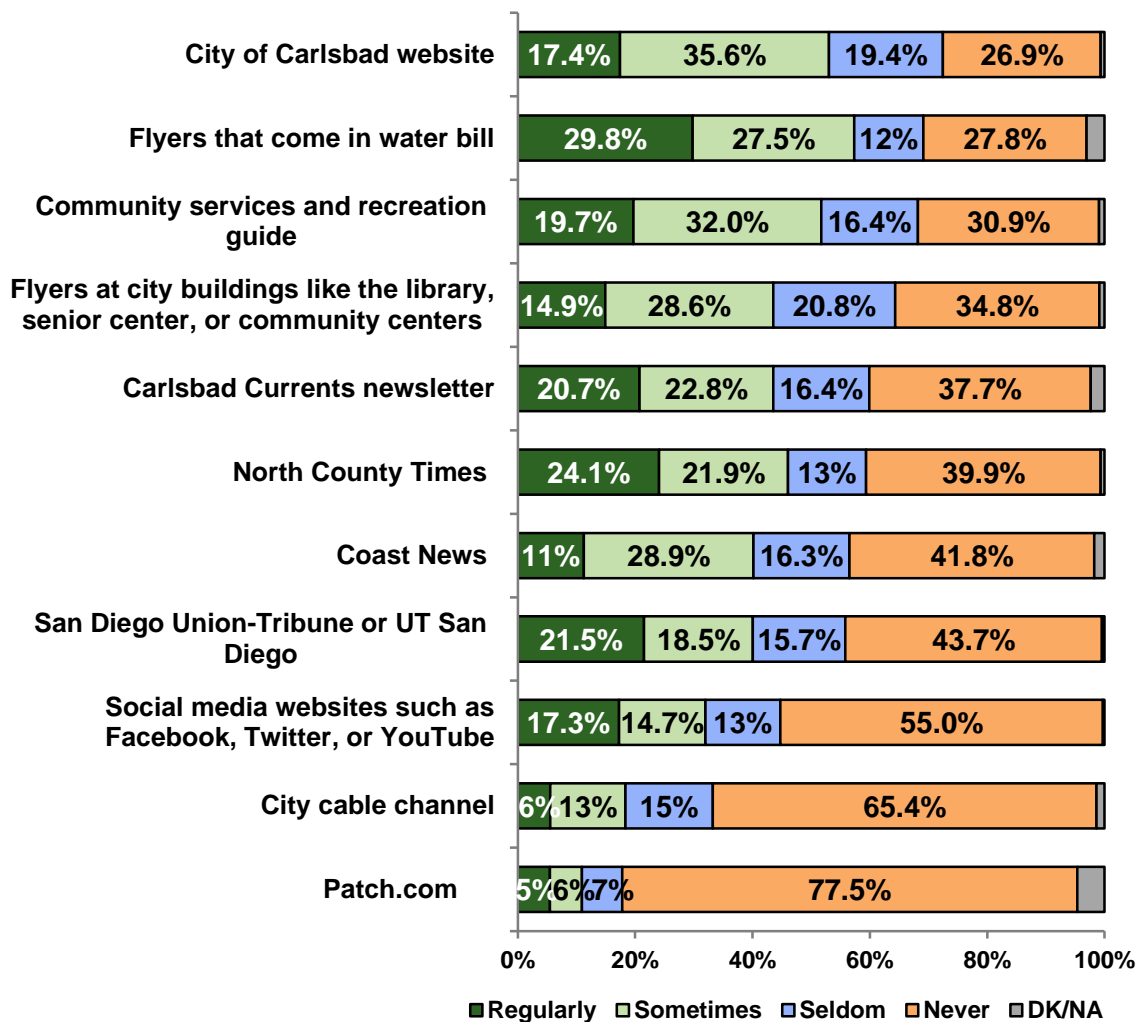
¹² Multiple responses permitted; the percentages in the figure total more than 100 percent.

INFORMATION SOURCES

Examining overall use of each source for information on city issues, programs, and services, the city's website (72%), flyers that come in the water bill (69% total use and also the highest percentage of regular use at 30%), and the community services and recreation guide (68%) were each utilized by more than two out of three residents.

Compared with previous years, statistically more residents reported referring to the city's website (higher than 2008), water bill flyers (higher than 2009 and 2010), North County Times (higher than 2010), and social media websites (higher than 2009-2011), whereas fewer referred to the community services and recreation guide (lower than 2009-2011), San Diego Union Tribune (lower than 2009 and 2011), and the city cable channel (lower than 2011).

Figure 21: Frequency of Using Information Sources¹³

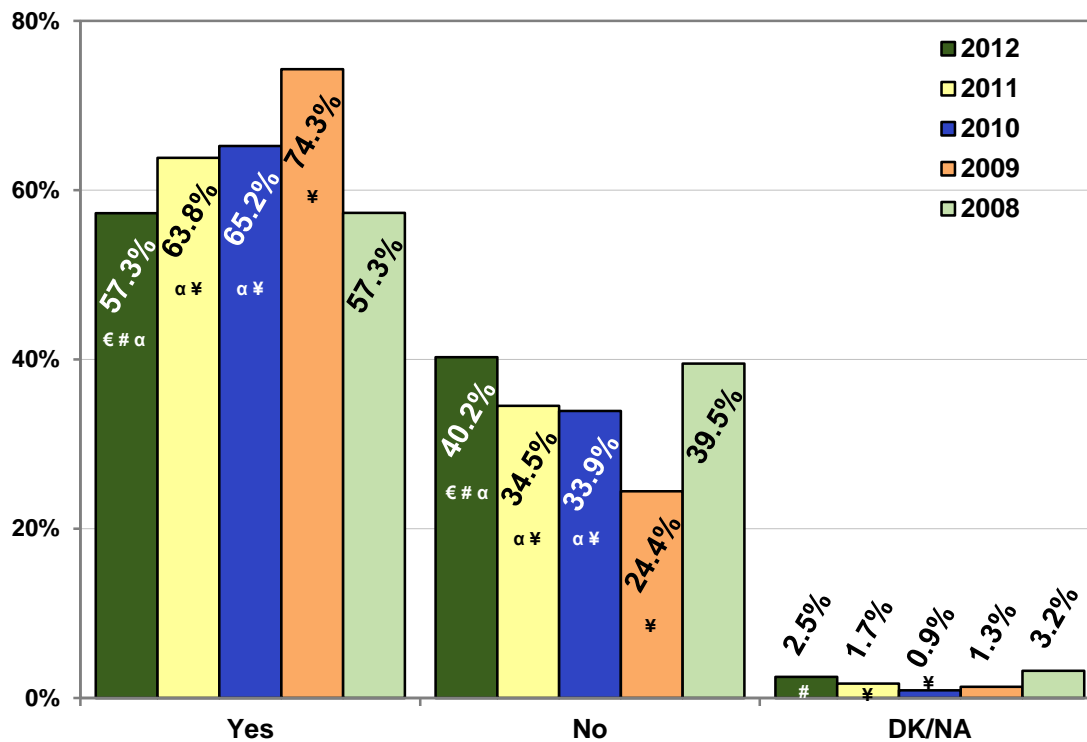


¹³ Figure sorted by overall use. Patch.com and Coast News were new to the 2012 survey.

PREVENTING POLLUTION OF CREEKS, LAGOONS, AND OCEAN

Consistent with 2008 but lower than percentages reported from 2009 to 2011, 57 percent of residents in 2012 had seen or heard information in the past year about how residents can prevent the pollution of local creeks, lagoons, and the ocean.

Figure 22: Informed about Preventing Water Pollution



€ Statistically significant change from 2011 (p<.05)

Statistically significant change from 2010

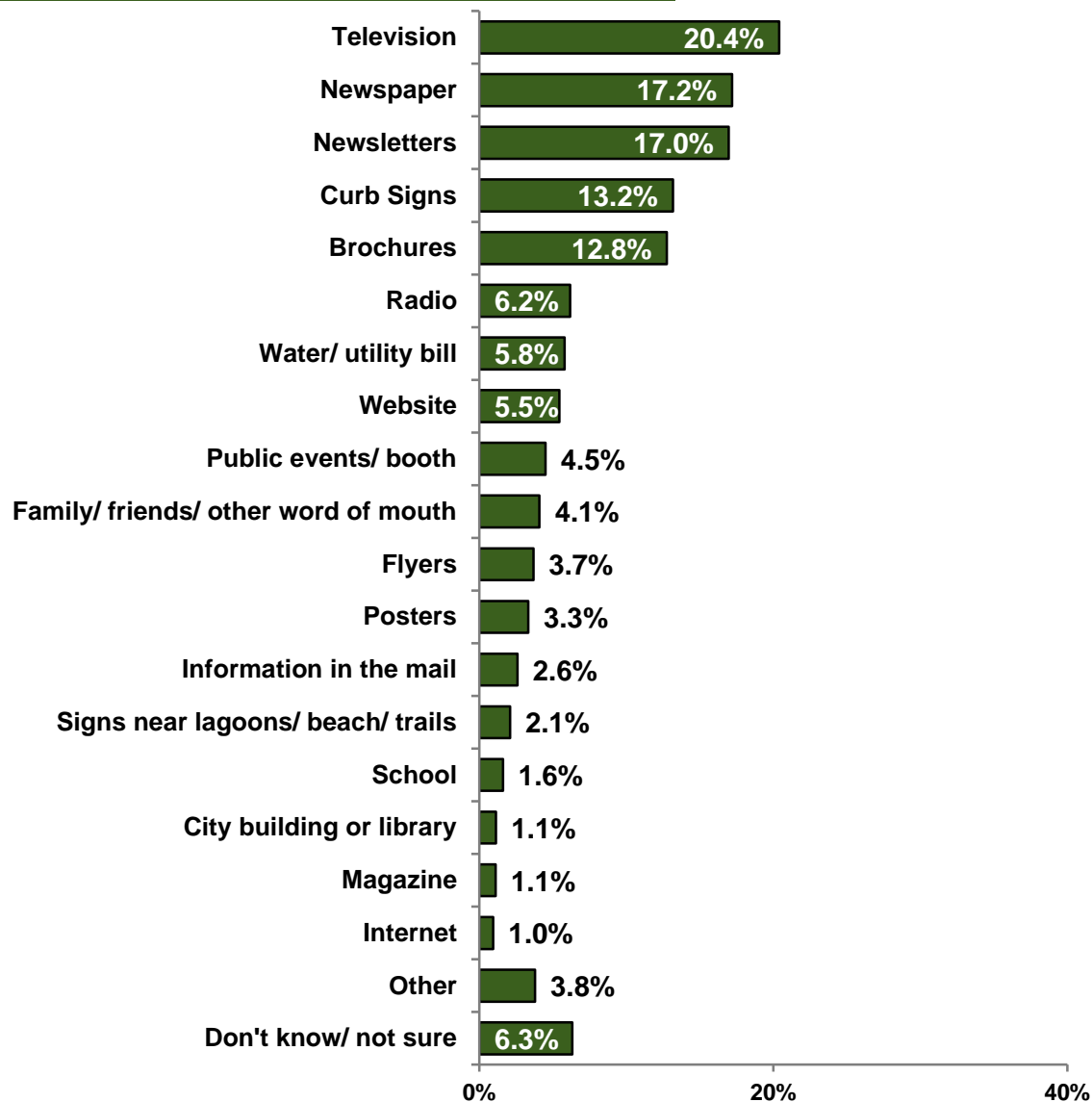
α Statistically significant change from 2009

‡ Statistically significant change from 2008

SOURCE OF INFORMATION

Residents who recalled seeing or hearing information about how residents can prevent the pollution of local creeks, lagoons, and the ocean were asked to recall the source of the information in an open-ended format. The most frequently cited sources were television (20%), newspapers (17%), and newsletters (17%). Although television and newspaper have been the top two sources each year, the percentage of respondents citing television as the source of the information was much lower in 2012 than previous years (2012: 20%, 2011: 29%, 2010: 32%, 2009: 38%, 2008: 34%).

Figure 23: Source of Pollution Prevention Information (n=573)¹⁴



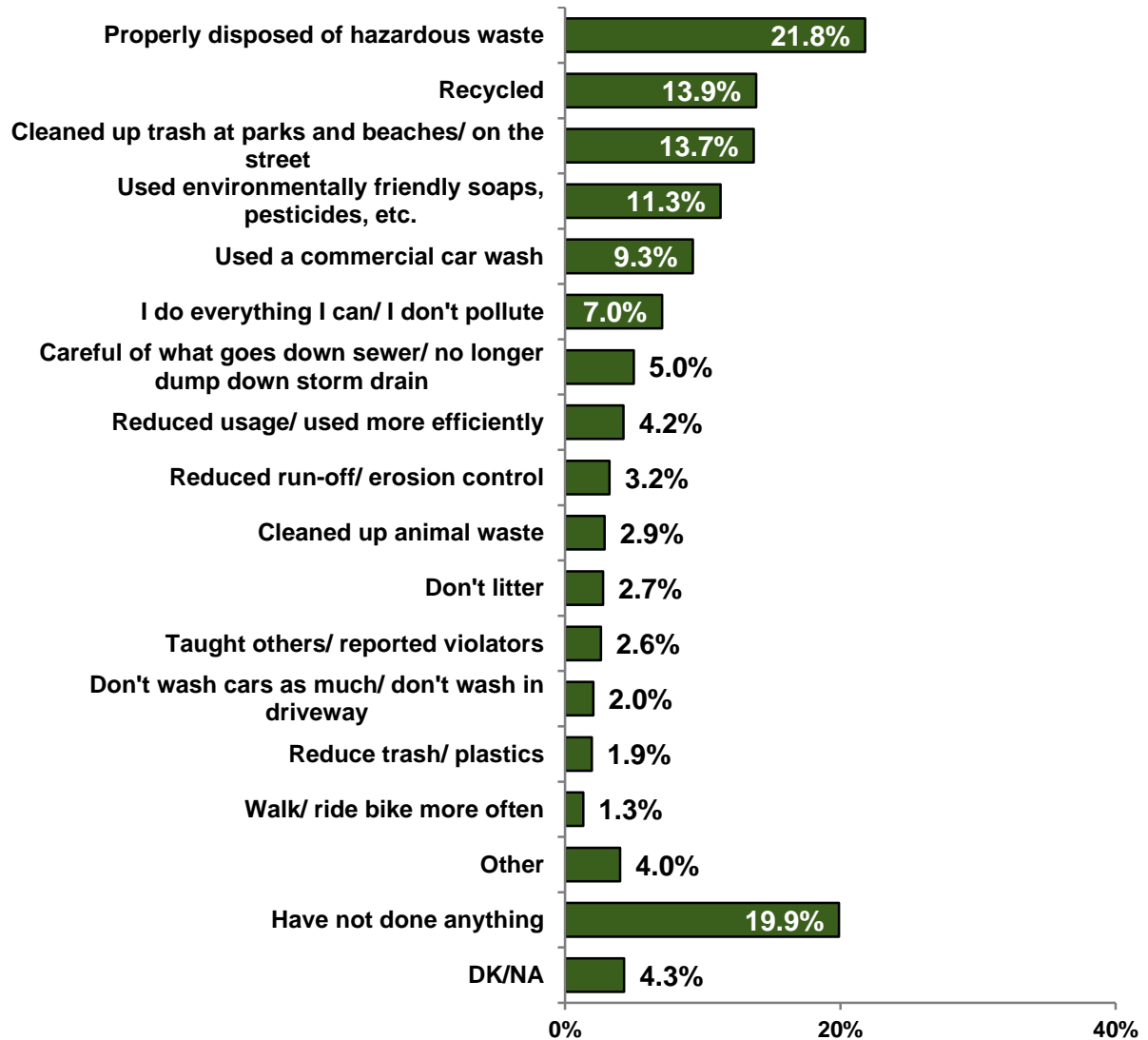
¹⁴ Multiple responses permitted; the percentages in the figure total more than 100 percent. For this figure, categories with less than one percent were combined into "Other." Please see Appendix B: Survey Toplines for a complete breakdown of responses.

ACTION BASED ON INFORMATION

Residents who recalled seeing or hearing information about how to prevent water pollution were next asked to indicate what they had done – if anything – to reduce the amount of pollution in local creeks, lagoons, and the ocean. Consistent with the past two years, 24 percent of respondents to this follow-up question indicated that they had not done anything or declined to state.

Twenty-two percent of those who recalled hearing or seeing information indicated that they properly disposed of hazardous waste, 14 percent recycled, and 14 percent cleaned up trash at parks, beaches, or on the street. No longer placing in the top group, the percentage that reported using a commercial car wash as a way to reduce water pollution was lower in 2012 than previous years (9% vs. 15% to 19%).

Figure 24: Action Taken Based on Pollution Prevention Information (n=573)¹⁵

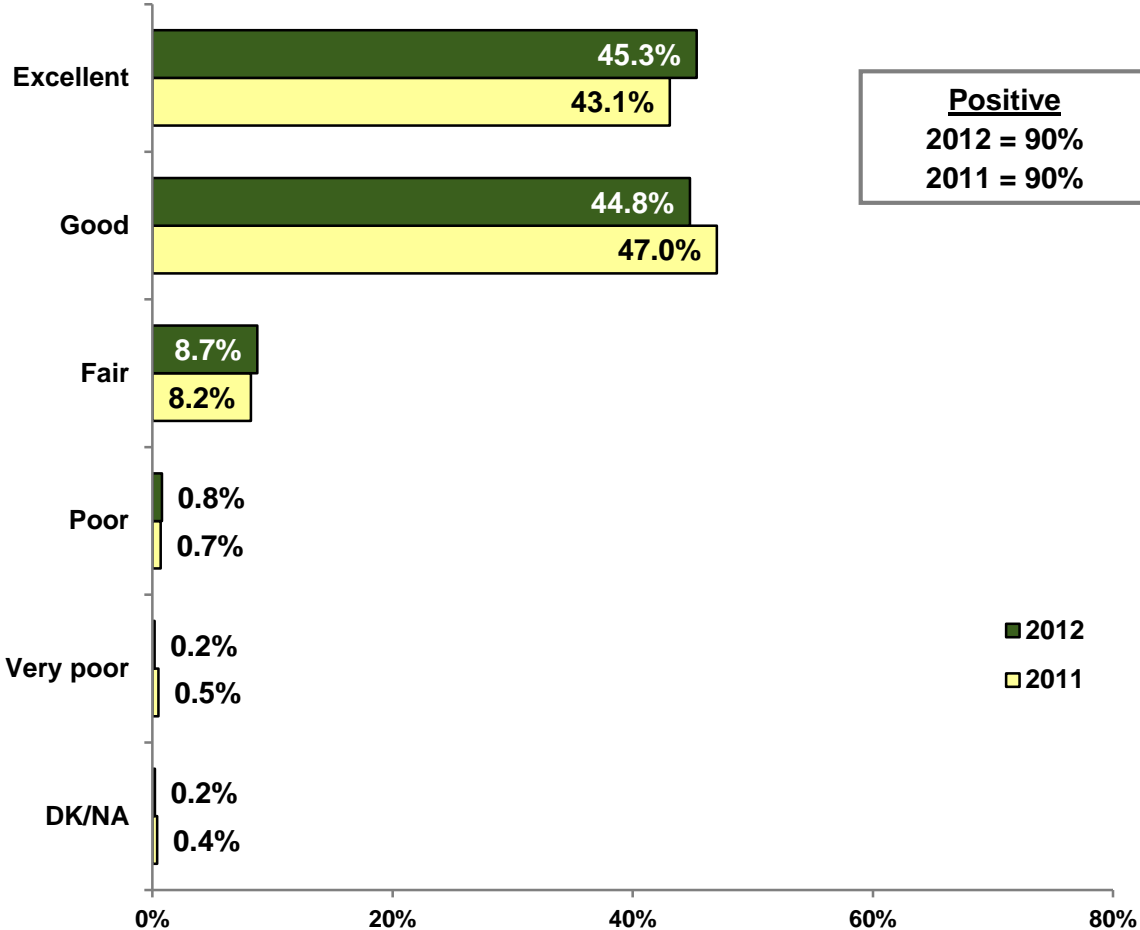


¹⁵ Multiple responses permitted; the percentages in the figure total more than 100 percent. Categories with less than one percent were combined into "Other" (see Appendix B for full breakdown).

EXPERIENCE VISITING THE CARLSBAD VILLAGE

Consistent with last year, 95 percent of residents reported visiting Carlsbad’s Downtown Village in a typical month, with the majority (54%) visiting at least once a week.¹⁶ Also in line with last year, nine out of ten residents who visited the Village rated their experience positively, with 45 percent reporting an “Excellent” experience and 45 percent rating it as “Good.”

Figure 25: Experience Visiting Carlsbad Village



¹⁶ Wording of this question changed slightly in 2011 to focus on a typical month. As such, previous years’ data are not displayed.

The following section examines use and perceptions regarding Carlsbad's Downtown Village by resident sub-groups.

- In general, residents who had a positive experience visiting Carlsbad's Downtown Village were more likely to rate other aspects of life in Carlsbad favorably. Ratings were positively correlated with: residents' views regarding quality of life, direction of the quality of life, confidence in city government, sense of community, perception of safety walking alone in their neighborhoods during the day, satisfaction with the job the city is doing to provide services, and satisfaction with city-resident communication.
- Residents who have lived in Carlsbad at least 15 years were the most likely to regularly visit the Village (63%).
- Seventy percent of residents living in apartments regularly visited the Village as compared to 52 percent of residents in single family detached homes or condominiums and townhomes. Renters were also more likely than owners to rate their experience as "Excellent" (51% vs. 43%).
- Residents of zip code 92009 were the least likely to report visiting the Village in a typical month (92008: 99%, 92009: 90%, 92010: 99%, 92011: 98%). By neighborhood, frequency of not visiting the Village in a typical month was highest among residents living in the La Costa/ La Costa Canyon (11%) and Rancho La Costa/ La Costa Oaks/ La Costa Ridge (9%) communities.
 - Compared to visitors in Olde Carlsbad zip codes (92008 and 92010), residents who lived in La Costa zip codes (92009 and 92010) and visited the Village in a typical month were less likely to rate their experience as "Excellent" and more likely to rate it as "Good" or "Fair."

APPENDIX A: METHODOLOGY

The table below provides an overview of the methodology utilized for the project.

Table 2: Overview of Project Methodology

Method	Telephone Survey (Mobile and Land Line)
Universe	82,082 Residents 18 Years and Older within the City of Carlsbad
Number of Respondents	1,001 Residents Completed a Survey
Average Length	20 minutes
Field Dates	September 12 – October 8, 2012
Margin of Error	The <i>maximum</i> margin of error for questions answered by all 1,001 respondents was +/-3.08% (95% level of confidence)

RESEARCH OBJECTIVES

Prior to beginning the project, BW Research met with the City of Carlsbad's Performance Measurement Resource Team to determine the research objectives for the 2012 study. The main research objectives of the study were to assess residents' perceptions regarding city services, quality of life, sense of community, neighborhood safety, city government, community values, and city-resident communication.

QUESTIONNAIRE DESIGN

Through an iterative process, BW Research worked closely with the city to develop a survey instrument that met all the research objectives of the study. In developing the instrument, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error within the survey.

SAMPLING METHOD

BW Research utilized a mixed-method sampling plan that incorporated a traditional random digit dial (RDD) methodology (listed and unlisted traditional land line numbers), an RDD cell phone sample, and a listed sample of residents (listed land line and cell phone numbers) known to live within the City of Carlsbad or known to be a cell phone number.

The RDD methodology is based on the concept that all residents with a traditional land line telephone in their home have an equal probability of being called and invited to participate in the survey. Both the cell phone RDD sample and the listed sample supplemented the traditional RDD methodology and allowed for targeted calling to demographic groups of residents typically under-represented in traditional telephone survey research. Screener questions were utilized at the beginning of the survey to ensure that the residents who participated in the survey lived within the City of Carlsbad.

DATA COLLECTION

Prior to beginning data collection, BW Research conducted interviewer training and also pre-tested the survey instrument to ensure that all the words and questions were easily understood by respondents.

Interviews were generally conducted from 5:00 pm to 9:00 pm Monday through Thursday and 11:00 am to 5:00 pm on Saturday and Sunday to ensure that residents who commuted or were not at home during the week had an opportunity to participate.

Throughout data collection, BW Research checked the data for accurateness and completeness and monitored the percentage of residents with language barriers to determine whether or not the survey should be translated into a language other than English. Since less than one percent of all numbers attempted were identified as having a language barrier, translating the survey into languages other than English was not necessary for representative results.

DATA PROCESSING

Prior to analysis, BW Research examined the demographic characteristics of the 1,001 respondents who completed a survey to the known universe of residents 18 years and older using the San Diego Association of Government's (SANDAG's) 2012 demographic estimates for the City of Carlsbad. It is estimated that among Carlsbad's 107,674 residents, 82,082 are 18 years and older. After examining the dimensions of zip code, gender, ethnicity, and age, the data were weighted to appropriately represent the universe of adult residents and ensure generalizability of the results.

A NOTE ABOUT MARGIN OF ERROR AND ANALYSIS OF SUB-GROUPS

The overall margin of error for the study, at the 95% level of confidence, is between +/-1.85 percent and +/- 3.08 percent (depending on the distribution of each question) for questions answered by all 1,001 respondents. It is important to note that questions asked of smaller groups of respondents (such as questions that were only asked of residents who visited the Village) or analysis of sub-groups (such as examining differences by length of residence or gender) will have a margin of error greater than +/-3.08 percent, with the exact margin of error dependent on the number of respondents in each sub-group. BW Research has utilized statistical testing to account for the margin of error within sub-groups and highlight statistically significant sub-group differences throughout this report.

COMPARISONS OVER TIME

Similar to the analysis of sub-groups, BW Research utilized statistical testing to assess whether the changes evidenced from previous survey years were due to actual changes in attitudes, perceptions, or behaviors or simply due to chance (i.e., margin of error).

APPENDIX B: SURVEY TOPLINES

Introduction

Hello, my name is _____ and I'm calling on behalf of the City of Carlsbad. The City has hired BW Research, an independent research agency, to conduct a survey concerning issues in your community and we would like to get your opinions. [IF RESPONDENT INDICATES THEY ARE A CITY COUNCIL MEMBER OR CITY STAFF- THANK THEM AND LET THEM KNOW THIS SURVEY IS MEANT FOR CARLSBAD RESIDENTS WHO ARE NOT CURRENTLY WORKING FOR THE CITY]

(If needed): This should just take a few minutes of your time.

(If needed): I assure you that we are an independent research agency and that all of your responses will remain strictly confidential.

For statistical reasons, I would like to speak to the youngest adult male currently at home that is at least 18 years of age. (Or youngest female depending on statistics of previous completed interviews)

(IF THERE IS NO MALE/FEMALE AT LEAST 18 AVAILABLE, THEN ASK:)

Ok, then I'd like to speak to the youngest adult female/male currently at home that is at least 18 years of age.

(IF THERE IS NO MALE/FEMALE AT LEAST 18 AVAILABLE, ASK FOR CALLBACK TIME)

(If needed): This is a study about issues of importance in your community – it is a survey only and we are not selling anything.

(If needed): This survey should only take a few minutes of your time.

(If the individual mentions the national do not call list, respond according to American Marketing Association guidelines): “Most types of opinion and marketing research studies are exempt under the law that congress recently passed. That law was passed to regulate the activities of the telemarketing industry. This is a legitimate research call. Your opinions count!”)

Screeners Questions

SCREENER A Before we begin, I want to confirm that you live within our study area. Are you currently a resident of the City of Carlsbad?

100.0%	Yes [Continue]
0.0%	No [Thank and terminate]

SCREENER B Are you a Carlsbad City Council member or do you currently work for the City of Carlsbad?

0.0%	Yes [Thank and terminate]
100.0%	No [Continue]

SCREENER C And what is your home zip code?
(If respondent gives the PO Box zip codes 92013 or 92018, prompt them to give their home zip code for survey purposes).

27.3%	92008 [Continue]
38.8%	92009 [Continue]
13.7%	92010 [Continue]
20.3%	92011 [Continue]
0.0%	Other [Thank and terminate]
0.0%	DK/NA [Thank and terminate]

Q1 To begin with, how long have you lived in the City of Carlsbad?

3.5%	Less than 1 year
22.3%	1 to 4 years
22.7%	5 to 9 years
19.3%	10 to 14 years
32.1%	15 years or more
0.1%	(Don't Read) DK/NA

Q2 Generally speaking, are you satisfied or dissatisfied with the job the City of Carlsbad is doing to provide city services? (GET ANSWER, THEN ASK:) Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?

63.5%	Very satisfied
30.0%	Somewhat satisfied
2.4%	Somewhat dissatisfied
1.3%	Very dissatisfied
2.8%	(Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=972)

65.4%	Very satisfied
30.9%	Somewhat satisfied
2.5%	Somewhat dissatisfied
1.3%	Very dissatisfied

Q3 How would you rate your quality of life in Carlsbad?

65.0%	Excellent
31.8%	Good
2.8%	Fair
0.0%	Poor
0.2%	Very poor
0.2%	(Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=999)

65.2%	Excellent
31.8%	Good
2.8%	Fair
0.0%	Poor
0.2%	Very poor

Q4 Overall, do you feel the quality of life in Carlsbad is getting better, getting worse, or staying about the same?

23.2%	Getting better
11.4%	Getting worse
61.9%	Staying about the same
3.4%	(Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=966)

24.1%	Getting better
11.8%	Getting worse
64.1%	Staying about the same

Q5

In your opinion, what is the number one thing that the City of Carlsbad could do to improve the quality of life within the community? (DO NOT READ - ONE RESPONSE ONLY)

- 9.8% Stop building/ stop growth
- 9.1% Fix the traffic problems
- 8.4% Nothing needs improvement
- 7.4% Improve the quality of the roads and other infrastructure
- 6.8% Improve schools
- 6.4% Preserve more open space
- 4.1% Increase/ improve police services
- 3.5% Be more business friendly/ provide more shops
- 3.4% Increase recreation opportunities
- 1.9% More community events/ programs
- 1.8% Improve beach access
- 1.6% Better economic plan/ lower taxes
- 1.5% More affordable housing
- 1.1% Listen to the residents/ care more about the people in the community
- 1.1% More public transportation
- 1.0% Build Desalination Plant
- 0.7% Improve waste management/ City cleanliness
- 0.6% More jobs
- 0.5% Remove the illegal immigrants
- 0.5% Maintain public employees
- 0.4% More activities/ programs for children and young adults
- 0.4% Need new Mayor and/ or City Council
- 3.5% Other (Specify: ____)
- 24.5% DK/NA

Q6 Now I'd like to ask a couple questions about safety in the city. When you are _____ would you say that you feel very safe, somewhat safe, somewhat unsafe, or very unsafe?

	<u>Very safe</u>	<u>Somewhat safe</u>	<u>Somewhat unsafe</u>	<u>Very unsafe</u>	<u>(Don't Read) DK/NA</u>
A. Walking alone in your neighborhood during the day	89.4%	9.3%	0.5%	0.4%	0.4%
B. Walking alone in your neighborhood after dark	56.3%	33.7%	5.1%	1.4%	3.5%

QUESTION 6 WITH DK/NA FACTORED OUT

	<u>Very safe</u>	<u>Somewhat safe</u>	<u>Somewhat unsafe</u>	<u>Very unsafe</u>
A. Walking alone in your neighborhood during the day (n=997)	89.7%	9.3%	0.5%	0.4%
B. Walking alone in your neighborhood after dark (n=966)	58.3%	34.9%	5.3%	1.4%

Q7 Next, please think about the sense of community that you feel living in Carlsbad. Would you say that you feel a strong sense of community, a weak sense of community, or no sense of community at all?

(IF STRONG OR WEAK, THEN ASK:) Would that be very (strong/weak) or somewhat (strong/weak)?

32.8%	Very strong
40.5%	Somewhat strong
18.1%	Somewhat weak
2.4%	Very weak
4.8%	None at all
1.4%	(Don't Read) DK/NA

Q8

Please tell me whether you agree or disagree with each of the following statements about your neighborhood.

Here's the (first/next) one: _____. (READ ITEM AND ASK:) Do you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with the statement?

RANDOMIZE

	<u>Strongly agree</u>	<u>Agree</u>	<u>Neither agree nor disagree</u>	<u>Disagree</u>	<u>Strongly disagree</u>	<u>(Don't Read) DK/NA</u>
A. I can recognize most the people who live in my neighborhood	24.7%	50.4%	5.5%	16.9%	2.1%	0.3%
B. Very few of my neighbors know me	8.1%	25.7%	3.3%	46.1%	16.4%	0.5%
C. I have almost no influence over what my neighbor is like	9.2%	25.0%	10.9%	45.6%	7.7%	1.6%
D. My neighbors and I want the same things from this community	20.5%	51.7%	11.5%	7.6%	1.9%	6.8%
E. If there is a problem in my neighborhood, people who live here can get it solved	18.1%	57.2%	9.6%	8.4%	3.0%	3.8%
F. It is very important for me to feel a sense of community with other residents	26.1%	54.5%	8.2%	9.4%	1.4%	0.5%

Q9 Overall, how confident are you in the Carlsbad city government to make decisions that positively affect the lives of its community members?

- 22.5% Very confident
- 57.7% Somewhat confident
- 10.8% Somewhat unconfident
- 3.6% Very unconfident
- 5.4% (Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=947)

- 23.8% Very confident
- 61.0% Somewhat confident
- 11.4% Somewhat unconfident
- 3.8% Very unconfident

Now I'm going to read a list of statements that describe Carlsbad's vision for the City. Please indicate whether you generally agree, disagree, or neither agree nor disagree with the following statements that describe characteristics or qualities of Carlsba.

Q10

Here is the (first/next) one: _____ Do you generally agree, disagree or neither agree nor disagree with the statement? (GET ANSWER IF AGREE OR DISAGREE ASK:) Would that be strongly (agree/disagree) or somewhat (agree/disagree)?

RANDOMIZE

	<u>Strongly agree</u>	<u>Agree</u>	<u>Neither agree nor disagree</u>	<u>Disagree</u>	<u>Strongly disagree</u>	<u>(Don't Read) DK/NA</u>
A. Carlsbad has a small town, connected feel	39.9%	35.3%	5.7%	12.1%	5.0%	2.1%
B. Carlsbad maintains its beach community character	59.0%	30.6%	3.7%	4.1%	2.0%	0.7%
C. Carlsbad promotes active lifestyles by providing access to trails, parks, beaches and other recreational opportunities	68.0%	26.0%	2.1%	2.4%	0.5%	1.1%
D. Carlsbad supports a strong local economy by promoting business diversity and tourism	50.3%	34.0%	5.8%	4.0%	2.2%	3.6%
E. Carlsbad is improving access to walking and biking trails	39.4%	35.6%	9.6%	7.3%	2.6%	5.6%
F. Carlsbad is improving access to public transportation	11.9%	27.6%	20.4%	14.4%	9.4%	16.3%
G. Carlsbad supports environmental sustainability	33.8%	44.5%	8.9%	5.0%	2.0%	5.9%
H. Carlsbad promotes the arts	47.2%	35.3%	7.8%	4.4%	1.7%	3.6%
I. Carlsbad celebrates the City's cultural heritage	26.1%	35.5%	14.3%	10.7%	3.8%	9.6%
J. Carlsbad supports quality education	41.6%	30.2%	9.1%	5.5%	4.8%	8.8%
K. Carlsbad supports neighborhood revitalization and livable communities	31.4%	38.5%	12.2%	5.3%	2.6%	10.1%
L. Carlsbad protects and enhances open space and the natural environment	43.0%	36.3%	5.1%	8.4%	5.0%	2.1%

Q10 WITH DK/NA FACTORED OUT

	<u>Strongly agree</u>	<u>Agree</u>	<u>Neither agree nor disagree</u>	<u>Disagree</u>	<u>Strongly disagree</u>
A. Carlsbad has a small town, connected feel (n=980)	40.7%	36.1%	5.9%	12.3%	5.1%
B. Carlsbad maintains its beach community character (n=994)	59.4%	30.8%	3.7%	4.2%	2.0%
C. Carlsbad promotes active lifestyles by providing access to trails, parks, beaches and other recreational opportunities (n=990)	68.7%	26.3%	2.1%	2.4%	0.5%
D. Carlsbad supports a strong local economy by promoting business diversity and tourism (n=964)	52.2%	35.3%	6.0%	4.2%	2.3%
E. Carlsbad is improving access to walking and biking trails (n=945)	41.7%	37.7%	10.1%	7.7%	2.7%
F. Carlsbad is improving access to public transportation (n=838)	14.2%	32.9%	24.3%	17.2%	11.3%
G. Carlsbad supports environmental sustainability (n=942)	35.9%	47.3%	9.5%	5.3%	2.1%
H. Carlsbad promotes the arts (n=965)	48.9%	36.7%	8.1%	4.5%	1.7%
I. Carlsbad celebrates the City's cultural heritage (n=904)	28.9%	39.3%	15.8%	11.8%	4.2%
J. Carlsbad supports quality education (n=913)	45.6%	33.1%	9.9%	6.1%	5.3%
K. Carlsbad supports neighborhood revitalization and livable communities (n=899)	34.9%	42.9%	13.6%	5.9%	2.8%
L. Carlsbad protects and enhances open space and the natural environment (n=980)	44.0%	37.1%	5.2%	8.6%	5.1%

Q11

Now I'm going to read a list of services provided by the City of Carlsbad. For each one, please tell me how satisfied you are with the job the City of Carlsbad is doing to provide each service to residents.

Would you say you are satisfied, dissatisfied or neither satisfied nor dissatisfied with the city's efforts to: _____? (GET ANSWER AND THEN ASK:) Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?

RANDOMIZE Entire list, but keep K-M together and randomly insert

	<u>Very satisfied</u>	<u>Somewhat satisfied</u>	<u>Neither sat nor dissat</u>	<u>Somewhat dissatisfied</u>	<u>Very dissatisfied</u>	<u>(Don't Read) DK/NA</u>
A. Repair and maintain local streets & roads	47.7%	38.4%	2.8%	7.6%	2.6%	0.8%
B. Manage traffic congestion on city streets	33.7%	40.1%	5.6%	12.7%	6.6%	1.3%
C. Manage residential growth and development	29.6%	37.2%	9.7%	10.8%	6.2%	6.5%
D. Maintain the business climate in Carlsbad	43.2%	34.4%	10.1%	4.2%	1.8%	6.3%
E. Provide fire protection and emergency medical services	68.8%	19.2%	5.8%	0.5%	0.7%	5.0%
F. Provide law enforcement services	62.2%	25.9%	3.6%	3.2%	2.1%	3.0%
G. Provide local arts and cultural opportunities	43.3%	36.5%	9.9%	4.3%	1.1%	4.8%
H. Provide library services	79.3%	15.9%	2.6%	0.3%	0.3%	1.7%
I. Provide water services	61.1%	27.0%	4.8%	2.5%	1.4%	3.1%
J. Provide sewer services	58.1%	25.1%	8.3%	1.4%	0.7%	6.4%
K. Maintain city parks	71.1%	23.3%	2.7%	1.1%	0.9%	1.0%
L. Provide recreation programs	53.6%	24.7%	10.1%	2.4%	1.2%	8.0%
M. Provide trails and walking paths	60.6%	27.3%	4.4%	4.4%	0.7%	2.6%
N. Protect water quality in the city's creeks, lagoons, and ocean	42.4%	33.8%	8.9%	4.6%	1.8%	8.6%
O. Provide trash collection services	74.8%	18.8%	1.9%	1.9%	1.4%	1.2%
P. Provide street sweeping services	51.2%	29.7%	9.0%	3.9%	2.0%	4.2%
Q. Provide hazardous waste disposal	36.9%	28.0%	12.3%	6.1%	3.0%	13.7%
R. Provide recycling collection services	72.8%	20.3%	2.1%	2.3%	1.2%	1.3%

Q11 WITH DK/NA FACTORED OUT

	<u>Very satisfied</u>	<u>Somewhat satisfied</u>	<u>Neither sat nor dissat</u>	<u>Somewhat dissatisfied</u>	<u>Very dissatisfied</u>
A. Repair and maintain local streets and roads (n=992)	48.1%	38.7%	2.8%	7.7%	2.6%
B. Manage traffic congestion on city streets (n=988)	34.1%	40.6%	5.7%	12.9%	6.7%
C. Manage residential growth and development (n=936)	31.7%	39.8%	10.3%	11.6%	6.7%
D. Maintain the business climate in Carlsbad (n=937)	46.2%	36.7%	10.8%	4.4%	2.0%
E. Provide fire protection and emergency medical services (n=951)	72.4%	20.2%	6.1%	0.5%	0.8%
F. Provide law enforcement services (n=970)	64.1%	26.7%	3.7%	3.3%	2.2%
G. Provide local arts and cultural opportunities (n=953)	45.5%	38.3%	10.4%	4.5%	1.2%
H. Provide library services (n=984)	80.7%	16.1%	2.6%	0.3%	0.3%
I. Provide water services (n=969)	63.1%	27.9%	4.9%	2.6%	1.5%
J. Provide sewer services (n=937)	62.0%	26.9%	8.9%	1.5%	0.8%
K. Maintain city parks (n=991)	71.8%	23.5%	2.7%	1.1%	0.9%
L. Provide recreation programs (n=921)	58.3%	26.9%	11.0%	2.6%	1.3%
M. Provide trails and walking paths (n=975)	62.2%	28.0%	4.5%	4.5%	0.8%
N. Protect water quality in the city's creeks, lagoons, and ocean (n=914)	46.4%	37.0%	9.7%	5.0%	1.9%
O. Provide trash collection services (n=988)	75.7%	19.0%	1.9%	2.0%	1.4%
P. Provide street sweeping services (n=958)	53.5%	31.0%	9.3%	4.0%	2.1%
Q. Provide hazardous waste disposal (n=863)	42.8%	32.4%	14.3%	7.1%	3.4%
R. Provide recycling collection services (n=988)	73.8%	20.6%	2.1%	2.3%	1.2%

Switching gears a bit, now I would like to get your opinions about city-resident communication.

Q12 Are you satisfied or dissatisfied with the city's efforts to provide information to residents through its website, newsletters, water bill inserts and related sources of information? (GET ANSWER, THEN ASK:) Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?

50.9% Very satisfied
34.4% Somewhat satisfied
6.0% Somewhat dissatisfied
2.0% Very dissatisfied
6.7% (Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=933)

54.5% Very satisfied
36.9% Somewhat satisfied
6.4% Somewhat dissatisfied
2.2% Very dissatisfied

Q13 How often are you using the following sources of information when you want to find out about city issues, programs, and services?

RANDOMIZE

	<u>Regularly</u>	<u>Sometimes</u>	<u>Seldom</u>	<u>Never</u>	<u>(Don't Read) DK/NA</u>
A. The City of Carlsbad web site	17.4%	35.6%	19.4%	26.9%	0.7%
B. The North County Times	24.1%	21.9%	13.4%	39.9%	0.7%
C. The San Diego Union-Tribune or UT San Diego	21.5%	18.5%	15.7%	43.7%	0.5%
D. The community services and recreation guide	19.7%	32.0%	16.4%	30.9%	0.9%
E. Social media web sites such as Facebook, Twitter or YouTube	17.3%	14.7%	12.7%	55.0%	0.3%
F. Carlsbad Currents newsletter	20.7%	22.8%	16.4%	37.7%	2.4%
G. Flyers that come in your water bill	29.8%	27.5%	11.8%	27.8%	3.1%
H. Flyers at City buildings like the Library, Senior Center, or community centers	14.9%	28.6%	20.8%	34.8%	0.9%
I. City Cable Channel	5.5%	12.8%	14.9%	65.4%	1.4%
J. Patch.com	5.4%	5.5%	6.9%	77.5%	4.7%
K. Coast news	11.3%	28.9%	16.3%	41.8%	1.7%

Q14 Have you communicated directly with the City of Carlsbad staff on issues related to city business in the past 12 months?

28.7% Yes
 71.2% No
 0.1% (Don't Read) DK/NA

[ASK Q15 IF Q14 = "YES", OTHERWISE SKIP TO Q16]

Q15 How did you communicate with staff on the issues related to city business?
[ALLOW MULTIPLE RESPONSES]

(n=288)

- 61.3% Telephone
- 38.3% In-person
- 24.5% Email
- 5.3% Written letter
- 4.0% Completing a web form
- 0.3% (Don't Read) DK/NA

Next I would like you to think about the water in Carlsbad's creeks, lagoons, and the ocean.

Q16 Have you seen or heard anything during the past year about how residents can prevent the pollution of our creeks, lagoons, and ocean?

- 57.3% Yes [GO TO Q17]
- 40.2% No [SKIP TO Q19]
- 2.5% (Don't Read) DK/NA [SKIP TO Q19]

WITH DK/NA FACTORED OUT (n=976)

- 58.7% Yes
- 41.3% No

[IF Q16 = "NO" OR "DK/NA" SKIP TO Q19, OTHERWISE ASK Q17 AND Q18]

Q17

Where do you recall seeing or hearing about ways to prevent pollution?
(Don't read list. Multiple Response)

(n=573)

- 20.4% TV
- 17.2% Newspaper
- 17.0% Newsletters
- 13.2% Curb signs
- 12.8% Brochures
- 6.2% Radio
- 5.8% Water/ utility bill
- 5.5% Website
- 4.5% Public events/ booth
- 4.1% Family/ friends/ other word of mouth
- 3.7% Flyers
- 3.3% Posters
- 2.6% Information in the mail
- 2.1% Signs near lagoons/ beach/ trails
- 1.6% School
- 1.1% City building or library
- 1.1% Magazine
- 1.0% Internet
- 0.8% Movie theaters
- 0.6% Common sense/ it's all over the place
- 0.5% Calendar
- 0.4% Surfrider Foundation
- 0.4% Billboards
- 1.1% Other (Specify:____)
- 6.3% DK/NA

Q17 WITH DK/NA FACTORED OUT (n=537)

21.8%	TV
18.4%	Newspaper
18.1%	Newsletters
14.1%	Curb Signs
13.6%	Brochures
6.6%	Radio
6.2%	Water/ utility bill
5.8%	Website
4.8%	Public Events/ booth
4.3%	Family/ friends/ other Word Of Mouth
3.9%	Flyer
3.6%	Posters
2.8%	Information in the mail
2.2%	Signs near lagoons/ beach/ trails
1.7%	School
1.2%	City building or library
1.2%	Magazine
1.0%	Internet
0.8%	Movie Theaters
0.6%	Common sense/ It's all over the place
0.5%	Calendar
0.5%	Surfrider Foundation
0.4%	Billboards
1.2%	Other (Specify:___)

Q18

Given what you have seen or heard, what have you done, if anything, to reduce the amount of pollution in our creeks, lagoons, and oceans?

[DO NOT READ – ALLOW MULTIPLE RESPONSES]

(n=573)

- 21.8% Properly disposed of hazardous waste
- 13.9% Recycled
- 13.7% Cleaned up trash at parks and beaches/ on the street
- 11.3% Used environmentally friendly soaps, pesticides, etc.
- 9.3% Used a commercial car wash
- 7.0% I do everything I can/ I don't pollute
- 5.0% Careful of what goes down sewer/ no longer dump down storm drain
- 4.2% Reduced water usage/ used water more efficiently
- 3.2% Reduced run-off/ erosion control
- 2.9% Cleaned up animal waste
- 2.7% Don't litter
- 2.6% Taught others/ reported violators
- 2.0% Don't wash cars as much/ don't wash in driveway
- 1.9% Reduce trash/ plastics
- 1.3% Walk/ ride bike more often
- 0.7% Used different/ less pesticides
- 0.5% Changed landscaping
- 0.5% Stopped washing driveway
- 0.5% Composting
- 1.7% Other (Specify:___)
- 19.9% Have not done anything
- 4.3% DK/NA

Q18 WITH DK/NA FACTORED OUT (n=549)

22.8%	Properly disposed of hazardous waste
14.5%	Recycled
14.3%	Cleaned up trash at parks and beaches/ on the street
11.8%	Used environmentally friendly soaps, pesticides, etc.
9.7%	Used a commercial car wash
7.4%	I do everything I can/ I don't pollute
5.2%	Careful of what goes down sewer/ no longer dump down storm drain
4.4%	Reduced water usage/ used water more efficiently
3.4%	Reduced run-off/ erosion control
3.0%	Cleaned up animal waste
2.9%	Don't litter
2.7%	Taught others/ reported violators
2.1%	Don't wash cars as much/ don't wash in driveway
2.0%	Reduce trash/ plastics
1.4%	Walk/ ride bike more often
0.8%	Used different/ less pesticides
0.6%	Changed landscaping
0.5%	Stopped washing driveway
0.5%	Composting
1.8%	Other (Specify:___)
20.8%	Have not done anything

[Q19 ASKED TO ALL RESPONDENTS]

Next I am going to ask you a few questions about Carlsbad Village, also referred to as downtown Carlsbad in the northwestern part of the city.

Q19

How often do you visit Carlsbad's downtown village, in a typical month? [WAIT FOR RESPONSE, IF THEY SAY DO NOT KNOW, GIVE THREE CATEGORIES SHOWN IN OPTION 1, 2 AND 3]

- 53.5% Regularly, once a week or more
- 30.9% Sometimes, once a month or more
- 10.9% Seldom, less than once a month
- 4.3% Never [SKIP TO QA]
- 0.4% (Don't Read) DK/NA [SKIP TO QA]

[IF Q19= "NEVER" OR "DK/NA" SKIP TO QA, OTHERWISE ASK Q20]

Q20 How would you rate your experience while visiting Carlsbad's downtown village?
(n=954)

45.3% Excellent
44.8% Good
8.7% Fair
0.8% Poor
0.2% Very poor
0.2% DK/NA

WITH DK/NA FACTORED OUT (n=952)

45.4% Excellent
44.9% Good
8.8% Fair
0.8% Poor
0.2% Very poor

To wrap things up, I just have a few background questions for comparison purposes only.

QA Do you own or rent the unit in which you live?

25.6% Rent
72.6% Own
1.8% (Don't Read) Refused

QB Which of the following best describes your current home?

- 67.4% Single family detached home
- 9.0% Apartment
- 20.8% Condominium or Town Home
- 1.5% Mobile home
- 1.3% (Don't Read) Refused

QC Please tell me how many children under 18 live in your house.

- 60.4% No children
- 14.7% 1 child
- 16.8% 2 children
- 7.0% 3 or more children
- 1.1% Refused

QD In what year were you born? 19__
(Recoded into age)

9.3%	18 to 24 years
14.2%	25 to 34 years
17.3%	35 to 44 years
18.0%	45 to 54 years
18.7%	55 to 64 years
17.8%	65 years or older
4.6%	Refused

QE What neighborhood do you live in within Carlsbad?
[DO NOT READ, RECORD FIRST RESPONSE]

- 16.4% La Costa / La Costa Canyon
- 7.1% Calavera Hills
- 6.1% Olde Carlsbad
- 5.2% Aviara
- 4.4% Rancho Carrillo
- 3.8% None, I just live in Carlsbad
- 3.4% Village or Downtown Carlsbad
- 3.1% La Costa Greens
- 1.9% Bressi Ranch
- 1.8% Poinsettia
- 1.6% Tamarack Point
- 1.6% La Costa Oaks
- 1.4% Barrio
- 1.4% La Costa Ridge
- 0.7% Rancho La Costa
- 0.4% Carlsbad Ranch
- 0.4% North Beach
- 0.4% Hedionda Point
- 0.3% Rancho Carlsbad or Sunny Creek
- 0.3% Terramar
- 0.2% Ponto
- 0.1% South Beach
- 0.1% Kelly Ranch
- 26.1% Other (Specify: _____)
- 11.9% DK/NA

QE Breakdown of respondents' neighborhood identification

74.6%	Identified with a Carlsbad neighborhood
13.1%	Identified with an HOA
12.3%	Did not identify with a neighborhood

[IF QE= "NONE, I JUST LIVE IN CARLSBAD," "OTHER," OR "DK/NA" ASK QF THRU QL, OTHERWISE SKIP TO QM]

[ASK QF IF ZIPCODE IS 92008 OR 92010 AND ANSWERED "NONE, I JUST LIVE IN CARLSBAD," "OTHER," OR "DK/NA" FOR QE]

QF Do you live North or South of Carlsbad Village Drive?

(n=202)

21.4%	North
68.5%	South (Don't Read)
10.1%	Refused

[ASK QF IF ZIPCODE IS 92008 OR 92010 AND ANSWERED "NONE, I JUST LIVE IN CARLSBAD," "OTHER," OR "DK/NA" FOR QE]

QG Do you live North or South of Tamarack Avenue?
(n=202)

54.5% North
37.6% South
(Don't Read)
7.9% Refused

[ASK QF IF ZIPCODE IS 92010 AND ANSWERED "NONE, I JUST LIVE IN CARLSBAD," "OTHER," OR "DK/NA" FOR QE]

QH Do you live East or West of College Boulevard?
(n=60)

10.4% East
80.0% West
9.6% (Don't Read) Refused

[ASK QF IF ZIPCODE IS 92008 or 92011 AND ANSWERED "NONE, I JUST LIVE IN CARLSBAD," "OTHER," OR "DK/NA" FOR QE]

QI Do you live East or West of Interstate 5?

(n=265)

73.8%	East
22.2%	West
4.0%	(Don't Read) Refused

[ASK QF IF ZIPCODE IS 92009 or 92011 AND ANSWERED "NONE, I JUST LIVE IN CARLSBAD," "OTHER," OR "DK/NA" FOR QE]

QJ Do you live North or South of Poinsettia Lane?

(n=216)

32.7%	North
57.7%	South
9.5%	(Don't Read) Refused

[ASK QF IF ZIPCODE IS 92009 AND ANSWERED "NONE, I JUST LIVE IN CARLSBAD,"
"OTHER," OR "DK/NA" FOR QE]

QK Do you live North or South of La Costa Avenue?

(n= 93)

43.5%	North
44.2%	South
12.3%	(Don't Read) Refused

[ASK QF IF ZIPCODE IS 92009 AND ANSWERED "NONE, I JUST LIVE IN CARLSBAD,"
"OTHER," OR "DK/NA" FOR QE]

QL Do you live North or South of Olivenhain Road?

(n= 93)

65.2%	North
10.4%	South
24.4%	(Don't Read) Refused

QM What ethnic group do you consider yourself a part of or feel closest to?
(IF HESITATE, READ):

72.9% White or Caucasian
12.1% Hispanic or Latino
3.0% Asian
0.8% African American or Black
5.4% Other (Specify:____)
5.7% (Don't Read) DK/NA

**Those are all of the questions I have for you.
Thank you very much for participating!**

QN Gender (Recorded from voice, not asked):

48.4% Male
51.6% Female

O. First Name of Respondent _____
P. Phone _____
Q. Date of Interview _____
R. Name of Interviewer _____
S. Time of Interview _____