



envision CARLSBAD

Public Opinion Visioning Survey Report

June 2009



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1 EXECUTIVE SUMMARY

1.1 Envision Carlsbad

Envision Carlsbad is a City-sponsored community visioning process that invites residents to work together to create a new vision and plan for Carlsbad's future. For the past two decades, Carlsbad has been developing based on the premise of available land to accommodate a growing population. Today however, with the city almost 90 percent built-out, development will occur primarily as infill. New opportunities and challenges are emerging related to the protection and enhancement of the City's attractive setting and the quality of life that residents have worked hard over the years to create.

Envision Carlsbad is providing community members with a variety of opportunities to participate. This report documents the results of one outreach effort: the community-wide mail and online vision survey. Reports summarizing the various other outreach processes are also underway. In Fall 2009, input received from all outreach processes will be synthesized into a final vision document.

1.2 Introduction to the Study

The City of Carlsbad and Dyett & Bhatia partnered with BW Research Partnership, Inc. (BW Research) to conduct Carlsbad's 2009 Visioning Survey of Residents. The main research objectives of the study were to:

- assess residents' perceptions regarding the quality of life in their neighborhood as well as within the entire City of Carlsbad;

- evaluate residents' perceptions regarding Carlsbad's natural environment, local economy, and social setting; and
- identify residents' program and facility priorities.

1.3 Methodology Overview

The City of Carlsbad utilized a census-style approach to ensure that all residents had an equal opportunity to participate in the survey process. An introductory letter and survey were mailed to every household within the City (41,643 households) giving them the option of returning the enclosed survey (postage paid) or taking the online version of the survey. A Spanish version of the survey was also available upon request. The survey, which averaged 15 minutes in length, consisted of a series of closed-ended and some open-ended questions. The data collection period for the project was March 6 through May 1, 2009.

In total, a statistically representative sample of 7,167 Carlsbad residents 18 years and older completed a survey (6,871 mail, 296 online), resulting in a response rate of 17.2 percent and a maximum margin of error +/- 1.10 percent (at the 95 percent level of confidence) for questions answered by all 7,167 respondents.

1.4 Key Findings

Based on the analysis of the survey data, BW Research is pleased to present the City of Carlsbad with the following key findings. Please refer to the body of the report for a more comprehensive analysis of findings, including comparisons among resident sub-groups.

Quality of Life

- Ninety-three percent of residents rated the quality of life in their neighborhood as "Excellent" or "Good" and 90 percent provided a positive rating for the quality of life in Carlsbad as a whole.
- The majority of Carlsbad residents rated "Protecting natural habitats in and around Carlsbad" (65%), "Protecting undeveloped areas for hiking and exploring" (62%), and "Maintaining or improving property values within the City" (55%) as high priorities.
- When asked to identify the number one thing that the City should be focused on to improve the quality of life, the top three response categories among those who provided an opinion were "Stop/ limit development" (12%), "Increase parks and recreation facilities and



activities” (10%), and “Public safety/ enforcement/ reduce crime” (10%).

Natural Environment

- Eighty-six percent of residents rated the “Air quality” in Carlsbad as “Excellent” or “Good,” 68 percent rated the “Protection and preservation of open spaces and natural habitats” favorably, 67 percent rated the “Water quality” positively, and 61 percent provided a favorable rating for the “Quality and quantity of Carlsbad’s walking and biking trails.”
- Carlsbad residents were next asked in an open-ended format to identify the number one thing that the City of Carlsbad could do to improve the City’s natural environment. Among those who provided a response, the top categories were “Preserve open space” (23%) and “Stop/ limit development” (20%).
- Respondents reported the highest level of agreement with the statement “The City should be more actively involved in developing new renewable energy options, such as solar roofs or wind turbines” (75%), followed by “Beaches, lagoons and other waterways should be better protected with new regulations or stronger enforcement of current regulations” (64%).

Local Economy

- Twenty percent of residents rated the shopping, dining, and services available in Carlsbad as “Excellent” and the majority (51%) rated them as “Good.” Overall, 71 percent of residents provided a positive rating for Carlsbad’s available shopping, dining, and services, 22 percent provided a neutral rating, and five percent provided a negative rating.
- When asked about their favorite places to shop and dine in Carlsbad, 51 percent of respondents cited The Forum at Carlsbad, 49 percent indicated The Village in Downtown Carlsbad, and 46 percent cited the Carlsbad Premium Outlet Mall.
- Among those who provided an opinion, 44 percent of respondents rated the quality and quantity of jobs available in Carlsbad as “Excellent” (5%) or “Good” (39%) and 41 percent rated them as “Fair.”
- When asked to identify the number one way that Carlsbad could improve the City’s economy, expanding and improving shopping

and dining opportunities was the most popular response, cited by 32 percent of those who provided an opinion. Attracting bio/ high technology and other companies and increasing jobs was second at 13 percent and decreasing taxes, fees, and restrictions on businesses was third at seven percent.

- Forty percent of residents would like to see more “Small independent or specialty retail stores and services” in Carlsbad. Approximately one in five residents would like to see more “Home furnishings stores, such as Crate and Barrel or Pottery Barn” (22%) and “Tourist attractions and services” (21%).
- After being presented with the opinions of two neighbors who live in Carlsbad and who disagree about the value of increasing the number of businesses and stores in Carlsbad and the role they play in funding public services and facilities in the City of Carlsbad, respondents were asked which opinion was closest to their own.
- Forty-six percent agreed with the opinion of Davis that Carlsbad should limit the number of stores, restaurants, and other businesses within the City and 40 percent agreed with Smith that Carlsbad should be willing to increase the number of stores, restaurants, and other businesses. Additionally, 14 percent of residents were not sure which opinion was closest to their own.

Program and Facility Priorities

- Among those who provided a response, “Promoting more opportunities for volunteers to give back to the community” (42% “High priority”), “Increasing the number of walking and biking paths that connect to local parks and open space” (41%), and “Supporting additional community events, such as local art exhibitions and ‘Jazz in the Park’ type of events in the City” (40%) were viewed as high priorities by approximately four in ten respondents.

Social Setting

- Among those who provided a response, over 70 percent rated each of the following as “Excellent” or “Good”:
 - “Carlsbad’s recreational programs, facilities, and services” (79%),
 - “Carlsbad’s public education system, kindergarten through 12th grade” (72%), and



– “Community events and facilities in Carlsbad” (70%).

- Carlsbad residents were next asked to identify the number one way that Carlsbad could improve the City’s social setting. Among those who provided an opinion, the top three response categories were “Increase parks and recreation facilities and activities” (18%), “Improve public school system/ revise district boundaries” (16%), and “Increase community events” (12%).

For additional detail on the research findings and a complete assessment of the survey results, please proceed to the body of the report beginning on the next page.

2 SURVEY RESULTS

2.1 QUALITY OF LIFE

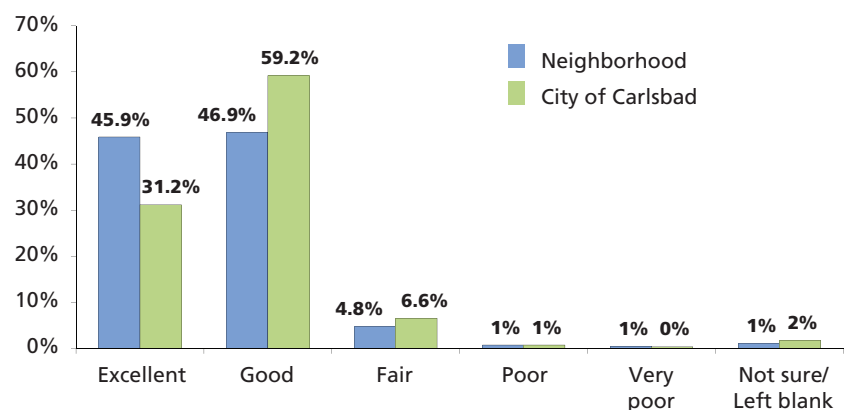
Early in the survey, respondents were asked to rate the quality of life in their neighborhood as well as the quality of life in the entire City of Carlsbad.

Residents provided higher ratings for the quality of life in their neighborhood than the City as a whole. Forty-six percent of residents felt that the quality of life in their neighborhood was “Excellent” and 47 percent rated it as “Good.” Comparatively, 31 percent of residents rated the quality of life in the entire City of Carlsbad as “Excellent” and 59 percent rated it as “Good.”

Overall, 93 percent of residents provided a positive rating for the quality of life in their neighborhood, five percent provided a neutral rating, and one percent provided a negative rating.

Ninety percent provided a positive rating for the quality of life in Carlsbad as a whole, seven percent rated it neutrally, and one percent rated it negatively.

Figure 1. Quality of Life Ratings–Neighborhood and City

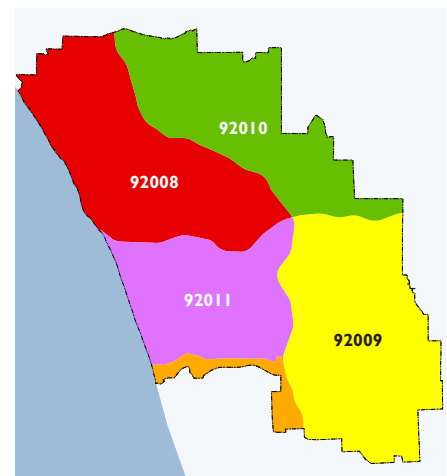


Throughout this report, analyses of resident sub-groups will be presented in text boxes. To follow is an examination of residents’ quality of life ratings by the many demographic and behavioral sub-groups examined in the study.



Below are the highlights from the analysis of quality of life ratings by sub-groups.

- Quality of life ratings were positively correlated with a number of other metrics throughout the survey, including: ratings for the shopping, dining, and services available in Carlsbad; the quality and quantity of jobs in Carlsbad; ratings for aspects of Carlsbad's natural environment; and ratings for aspects of the City's social setting.
- A regression analysis revealed the following as the top predictors of residents' views on the quality of life in their neighborhood:
 - Ratings for the quality of life in the entire City of Carlsbad;
 - Ratings for Carlsbad's public education system, kindergarten through 12th grade;
 - Household income; and
 - Ratings for the quality and quantity of Carlsbad's walking and biking trails;
- A regression analysis revealed the following as the top predictors of residents' views on the quality of life in the entire City of Carlsbad.
 - Ratings for the quality of life in their neighborhood;
 - Ratings for the protection and preservation of open spaces and natural habitats;
 - Ratings for Carlsbad's recreational programs, facilities, and services; and
 - Ratings for the shopping, dining, and services available in Carlsbad.
- Residents in zip code 92010 provided lower neighborhood quality of life ratings than those in other zip codes ("Excellent" or "Good"; 92010: 90%, 92008: 92%, 92009: 94%, 92011: 94%).
- Comparatively, residents in zip code 92011 provided lower city-wide quality of life ratings than those in other zip codes driven by a higher than average "Fair" rating ("Excellent" or "Good"; 92011: 87%, 92008: 93%, 92009: 90%, 92010: 92%).
- Residents who have lived in Carlsbad less than 10 years provided higher quality of life ratings than those who have lived in Carlsbad 10 years or more.
- Compared with older residents, those in the 18 to 24 year group were more likely to provide neutral or negative quality of life ratings.
- White and Latino(a) or Hispanic residents provided higher quality of life ratings than Asian and Pacific Islander or African American or Black residents, who were more likely to provide neutral ratings.
- Residents earning a household income of more than \$75,000 provided higher quality of life ratings than those earning \$75,000 or less.



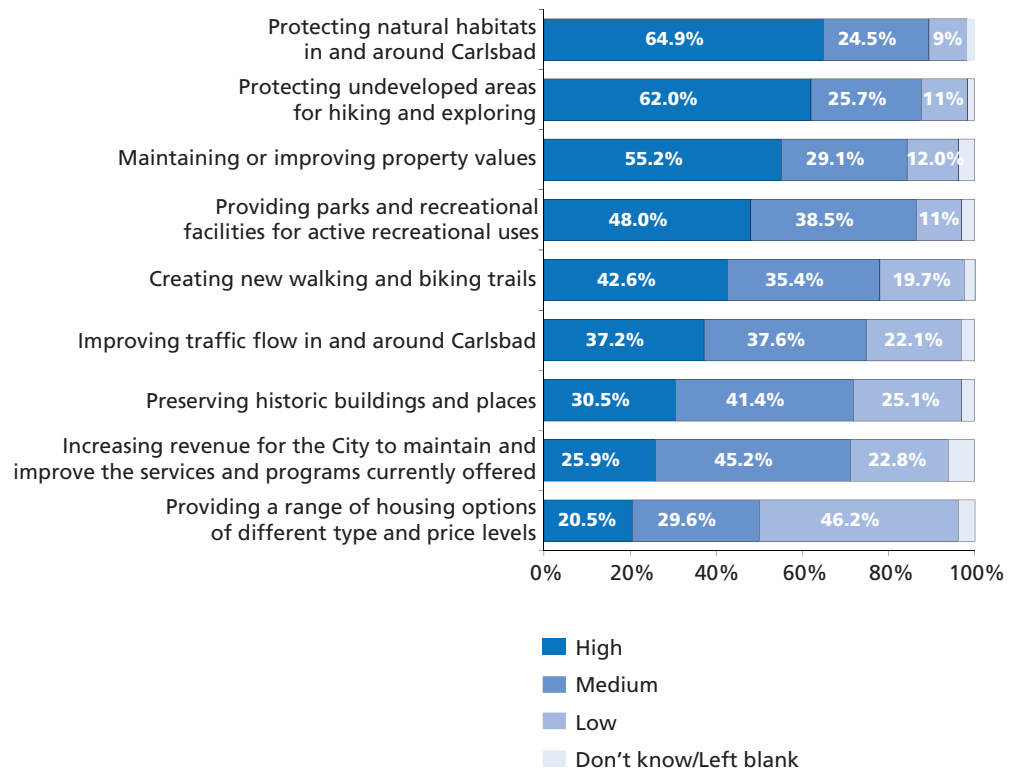
Planning Priorities

Carlsbad residents were next presented with a number of different priorities being considered in planning for the City’s future.

The majority of Carlsbad residents rated “Protecting natural habitats in and around Carlsbad” (65%), “Protecting undeveloped areas for hiking and exploring” (62%), and “Maintaining or improving property values within the City” (55%) as high priorities. Just shy of the majority, 48 percent of residents felt “Providing parks and recreational facilities in the City for active recreational uses” was a high priority.

Each of the four items detailed above was rated as a “High” or “Medium” priority by over 84 percent of residents surveyed.

Figure 2. Planning Priorities[‡]



[‡] The figure is sorted by the percentage “High priority.”

Although some items had a higher than average percentage of “Don’t know/ Left blank” responses, filtering out those responses resulted in the same rank ordering of the items. As such, the “Don’t know/ Left blank” responses were not filtered out of the analysis for this question.



To follow is an examination of the differences in “High priority” ratings by sub-groups.

- Residents of 92008 provided lower than average ratings for “Maintaining or improving property values,” but higher than average ratings for “Providing a range of housing options of different types and price levels within Carlsbad.”
- Residents living in areas west of El Camino Real, including Old Carlsbad (zip codes 92008 and 92010) were more likely than residents living east of El Camino Real, including La Costa (92009 and 92011) to rate “Preserving historic buildings and places within Carlsbad” as a high priority (34% vs. 28%).
- Residents in zip code 92011 provided lower than average ratings for:
 - “Protecting natural habitats in and around Carlsbad,”
 - “Protecting undeveloped areas for hiking and exploring,”
 - “Creating new walking and biking trails within Carlsbad.”
- The newest residents, those who have only been in Carlsbad less than one year, provided higher than average ratings for:
 - “Providing parks and recreational facilities in the City for active recreational uses,”
 - “Creating new walking and biking trails within Carlsbad,”
 - “Increasing revenue for the City to maintain and improve the services and programs that Carlsbad currently offers,” and
 - “Providing a range of housing options of different types and price levels within Carlsbad.”
- Conversely, those who have been in Carlsbad less than one year provided lower than average ratings for:
 - “Maintaining or improving property values,” and
 - “Improving traffic flow in and around Carlsbad.”
- Although it was ranked as the top priority by both groups, a higher percentage of residents who have lived in the City less than 15 years rated “Protecting natural habitats in and around Carlsbad” as a high priority (67% vs. 61%).
- The importance of “Improving traffic flow in and around Carlsbad” increased with length of residence. Twenty-six percent of those who have lived in Carlsbad less than five years rated it as a “High priority” compared with 47 percent of those who have lived in the City 15 years or more.
- Compared with those who provided positive quality of life ratings, those who felt the quality of life in their neighborhood was

"Fair," "Poor," or "Very poor" were more likely to rate each of the following as a "High priority":

- "Protecting natural habitats in and around Carlsbad,"
- "Protecting undeveloped areas for hiking and exploring," and
- "Creating new walking and biking trails within Carlsbad."
- Residents with children were more likely than those without children in their home to rate each of the three items above as a "High priority."
- Conversely, those without children were more likely than those with children to rate "Improving traffic flow in and around Carlsbad" and "Providing a range of housing options of different types and price levels within Carlsbad" as high priorities.
- Residents with a household income of \$50,000 or less as well as those 18 to 34 years of age were much more likely than those earning more than \$50,000 or those 35 years and older to place a high priority on "Providing a range of housing options of different types and price levels within Carlsbad."
- Compared with younger residents, those 65 years and older were less likely to assign a "High priority" to each of the following:
 - "Protecting natural habitats in and around Carlsbad,"
 - "Protecting undeveloped areas for hiking and exploring,"
 - "Providing parks and recreational facilities in the City for active recreational uses," and
 - "Creating new walking and biking trails within Carlsbad."
- Compared with residents 18 to 34 years of age, those 35 and older assigned a higher priority to:
 - "Maintaining or improving property values" and
 - "Improving traffic flow in and around Carlsbad."



Number One Way to Improve the Quality of Life

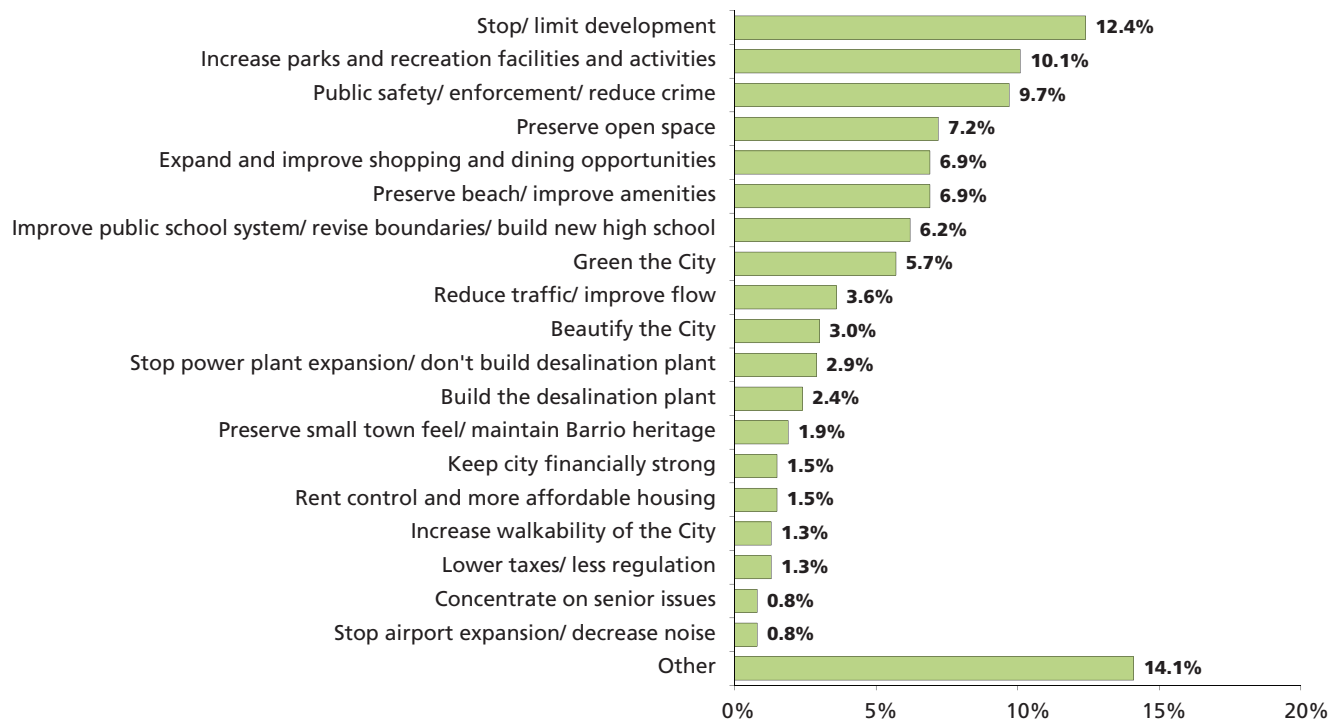
Carlsbad residents were next asked in an open-ended format¹ to identify the number one thing that the City should be focused on to improve the quality of life for its residents.

Overall, 55 percent of respondents wrote in a response to this question. The percentages presented below are among the 55 percent, or 3,976 residents who provided a response.

After coding the verbatim responses into groups, the top three response categories were “Stop/ limit development” (12%), “Increase parks and recreation facilities and activities” (10%), and “Public safety/ enforcement/ reduce crime” (10%).

Responses in the parks and recreation facilities and activities category were varied and included topics such as: increase number of parks, increase recreational facilities and programs, build the pool complex, better and safer bike paths, finish rail trail, more hiking/ mountain bike trails, interconnect open space and their trails, increase teen/ youth activities, and more dog parks/ trails.

Figure 3. Number One Way to Improve the Quality of Life[‡]



[‡] For a more detailed breakdown of responses, please refer to the Topline Results in Appendix A.

¹ Open-ended questions are those where respondents are free to write in any response without being constrained to choose from a list. Prior to analysis, the verbatim responses were coded into categories based on the similarity of responses.

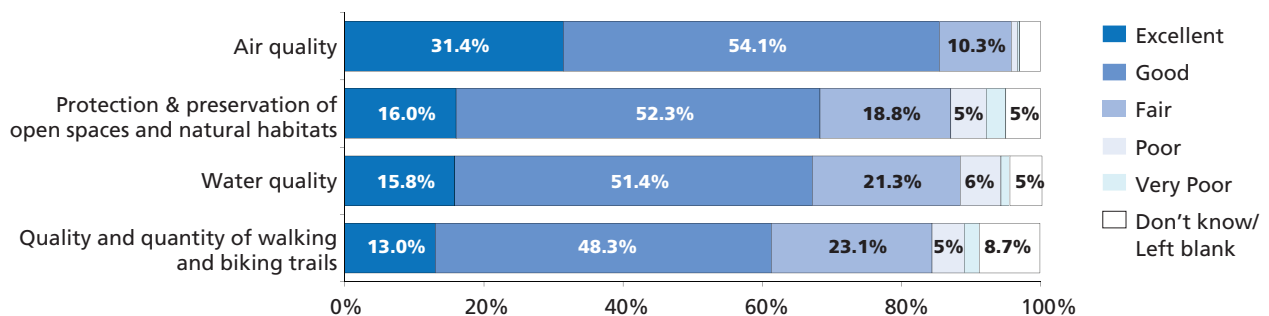
- Residents who rated the quality of life in their neighborhood or city-wide as either “Fair,” “Poor,” or “Very poor” were much more likely to write in a response to this question than those who rated the quality of life as “Excellent” or “Good.”
- Respondents who have lived in Carlsbad 10 years or more (and who wrote in a response to this question) were much more likely than those who have lived in the City less than 10 years to feel the City should stop or limit development to improve the quality of life (17% vs. 8%).
- Forty-six percent of residents who rated the quality of life in Carlsbad as poor (and wrote in a response to this question) felt that the City should stop or limit development.
- Residents 35 to 54 years of age were the most likely to cite increasing parks and recreation facilities and activities as the number one way to increase quality of life (13%), followed by those 18 to 34 years of age (10%), and then those 55 years and older (7%).
- Among those who wrote in a response, respondents with children were more likely to cite increasing parks and recreation facilities and activities than those without children (14% vs. 8%).

2.2 Carlsbad’s Natural Environment

The second section of the survey focused on Carlsbad’s natural environment, which includes the City’s air and water quality, protection and preservation of natural habitats, and the quality and quantity of walking and biking trails within Carlsbad.

Eighty-six percent of residents rated “Air quality” in Carlsbad as “Excellent” or “Good,” 68 percent rated the “Protection and preservation of open spaces and natural habitats” favorably, 67 percent rated the “Water quality” positively, and 61 percent provided a favorable rating for the “Quality and quantity of Carlsbad’s walking and biking trails.”

Figure 4. Ratings for Aspects of Carlsbad’s Natural Environment[‡]



[‡] Although some items had a higher than average percentage of “Don’t know/ Left blank” responses, filtering out those responses resulted in the same rank ordering of the items. As such, the “Don’t know/ Left blank” responses were not filtered out of the analysis for this question.



To follow is an examination of the differences in ratings for the various aspects of Carlsbad's natural environment by sub-groups.

- Residents in the inland zip codes, 92009 and 92010, provided lower positive ratings for the City's air quality than residents in the coastal zip codes, 92008 and 92011.
- Compared with residents in other zip codes, those in 92008 provided lower ratings for the quality and quantity of Carlsbad's walking and biking trails.
- Respondents who have lived in Carlsbad less than five years provided higher than average positive ratings for the City's "Protection and preservation of open spaces and natural habitats" but lower than average ratings for the City's "Water quality."
- Residents who have lived in the City 10 years or more provided lower positive ratings for the "Quality and quantity of Carlsbad's walking and biking trails" as compared to those who have lived in the City for less than 10 years.
- Homeowners and male respondents rated the City's air and water quality more favorably than renters and female respondents.
- Among the age groups, residents in the 18 to 24 year group provided the lowest positive ratings for each aspect of Carlsbad's natural environment, whereas residents 65 years and older provided the highest.

Number One Way to Improve the Natural Environment

Carlsbad residents were next asked in an open-ended format² to identify the number one thing that the City of Carlsbad could do to improve the City's natural environment.

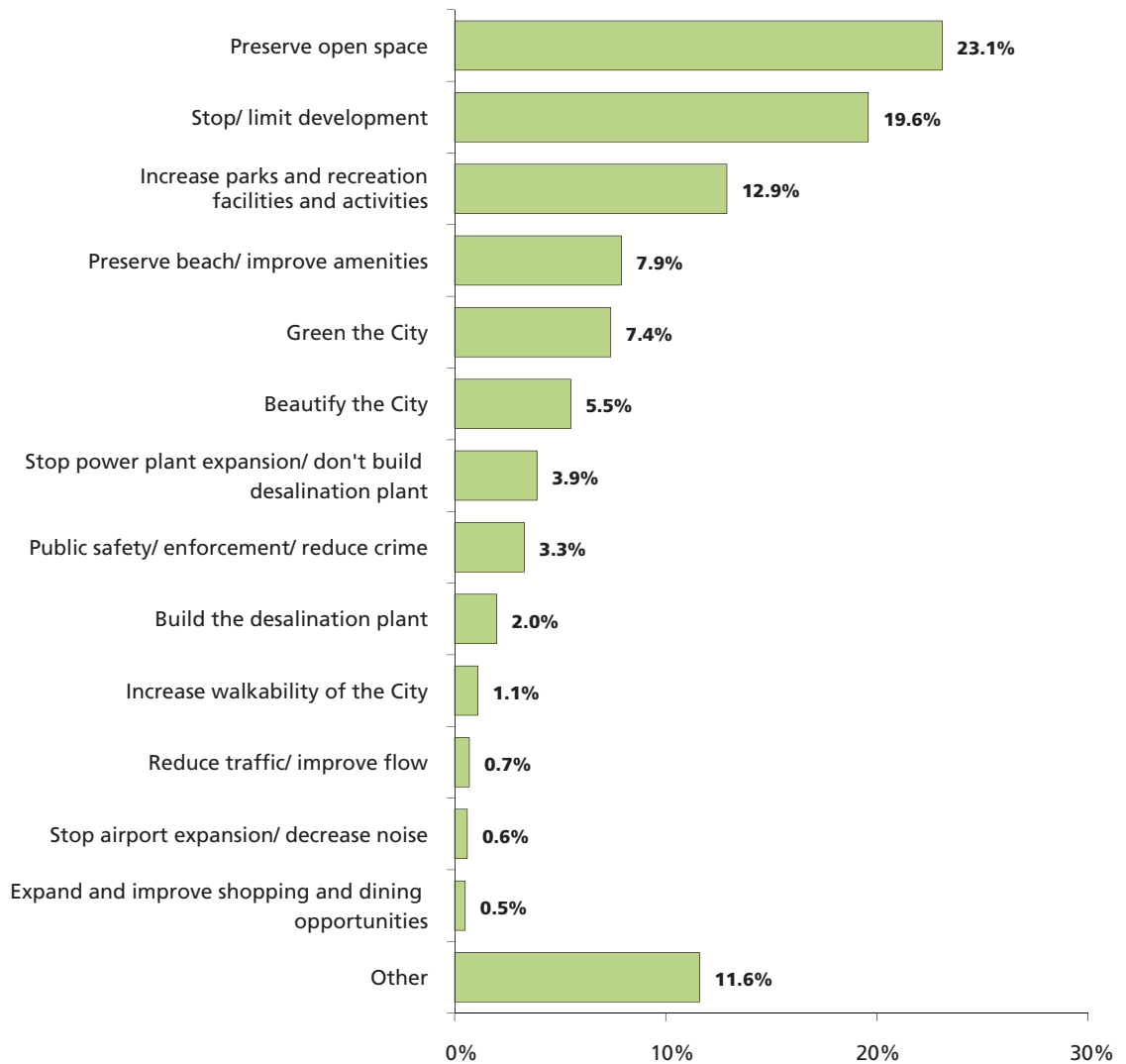
Overall, 39 percent of respondents wrote in a response to this question. The percentages presented below are among the 39 percent, or 2,821 residents who provided a response.

After coding the verbatim responses, the top response categories were "Preserve open space" (23%) and "Stop/ limit development" (20%).

Responses in the preserve open space category included both general and specific ideas. Some of the specifics included: preserve Calavera area including the creek, preserve the Buena Vista Creek area, preserve the Flower and Strawberry Fields, and preserve/ restore lagoons and their surroundings.

² Open-ended questions are those where respondents are free to write in any response without being constrained to choose from a list. Prior to analysis, the verbatim responses were coded into categories based on the similarity of responses.

Figure 5. Number One Way to Improve the Natural Environment[‡]



[‡] For a more detailed breakdown of responses, please refer to the Topline Results in Appendix A.

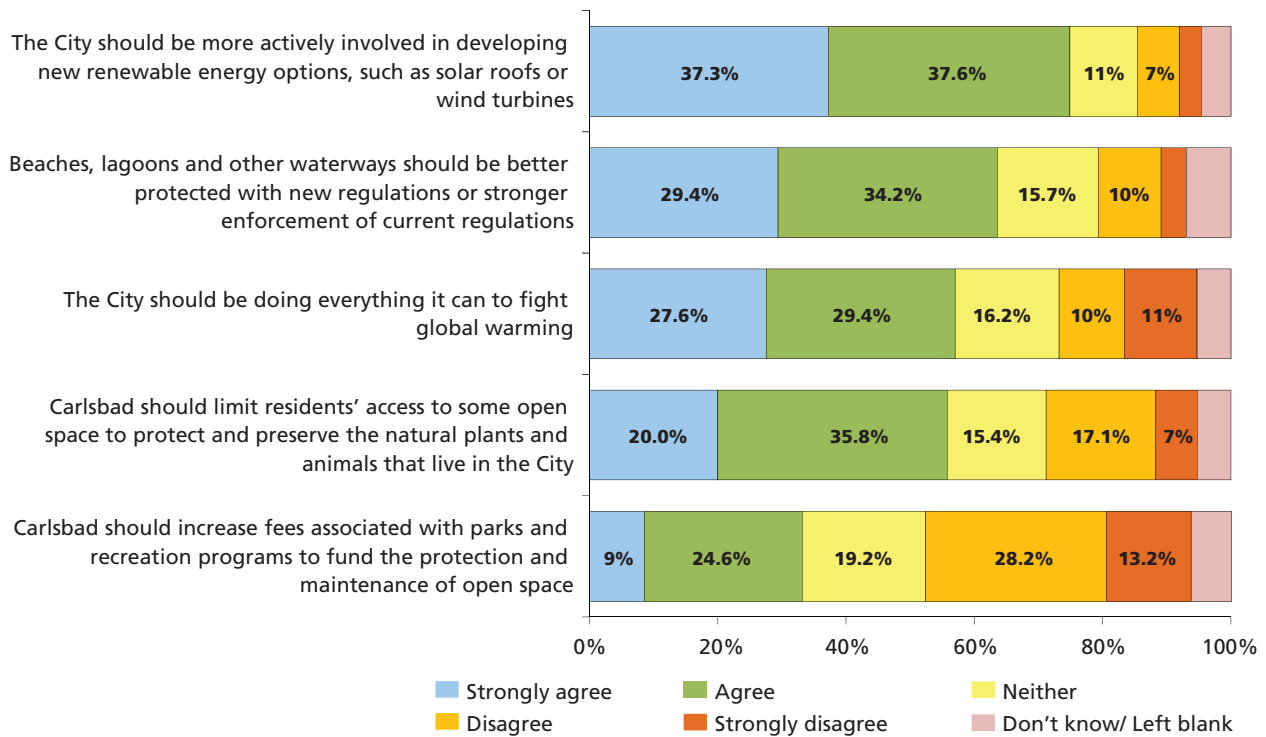
Natural Environment: Agreement with Statements

When asked to report their level of agreement with a variety of statements related to Carlsbad’s natural environment, respondents reported the highest level of agreement with the statement “The City should be more actively involved in developing new renewable energy options, such as solar roofs or wind turbines” (75%), followed by “Beaches, lagoons and other waterways should be better protected with new regulations or stronger enforcement of current regulations” (64%).



With the exception of “Carlsbad should increase the fees associated with parks and recreation programs to fund the protection and maintenance of Carlsbad’s open space,” the majority of respondents agreed with each statement.

Figure 6. Natural Environment: Agreement with Statements[‡]



[‡] Although some items had a higher than average percentage of “Don’t know/ Left blank” responses, filtering out those responses resulted in the same rank ordering of the items. As such, the “Don’t know/ Left blank” responses were not filtered out of the analysis for this question.

To follow is an examination of the differences in the level of agreement with each statement by the many sub-groups examined in the study.

- Residents in the coastal zip codes, 92008 and 92011 provided higher agreement than those in zip codes 92009 and 92010 with the statement: “Beaches, lagoons and other waterways in Carlsbad should be better protected with new regulations or stronger enforcement of current regulations.”
- Residents in zip code 92008 provided higher than average agreement with each of the following statements:
 - “The City should be more actively involved in developing new renewable energy options within the City, such as solar roofs or wind turbines” and
 - “The City of Carlsbad should be doing everything it can to fight global warming.”

- Comparatively, residents of zip code 92008 provided lower than average agreement with the statement “Carlsbad should increase the fees associated with parks and recreation programs to fund the protection and maintenance of Carlsbad’s open space.”
- Carlsbad’s newest residents, those who have only been in Carlsbad less than one year, reported higher than average agreement with each of the following:
 - “The City should be more actively involved in developing new renewable energy options within the City, such as solar roofs or wind turbines” and
 - “Carlsbad should limit residents’ access to some open space to protect and preserve the natural plants and animals that live in the City.”
- However, the less than one year group were the least likely to agree that “Carlsbad should increase the fees associated with parks and recreation programs to fund the protection and maintenance of Carlsbad’s open space.”
- With the exception of increasing fees associated with parks and recreation programs, renters reported a higher level of agreement with each statement than owners.
- Women reported a higher level of agreement across the statements than men.
- Compared to those with children, a higher percentage of residents without children agreed that:
 - “Carlsbad should limit residents’ access to some open space to protect and preserve the natural plants and animals that live in the City” and
 - “Carlsbad should increase the fees associated with parks and recreation programs to fund the protection and maintenance of Carlsbad’s open space.”
- Latino(a) or Hispanic residents as well as Asian or Pacific Islander respondents provided higher levels of agreements with each statement as compared to White respondents.
- Compared with older residents, those 18 to 24 were more likely to agree that:
 - “The City should be more actively involved in developing new renewable energy options within the City, such as solar roofs or wind turbines,”
 - “The City of Carlsbad should be doing everything it can to fight global warming,” and
 - “Carlsbad should limit residents’ access to some open space to protect and preserve the natural plants and animals that live in the City.”



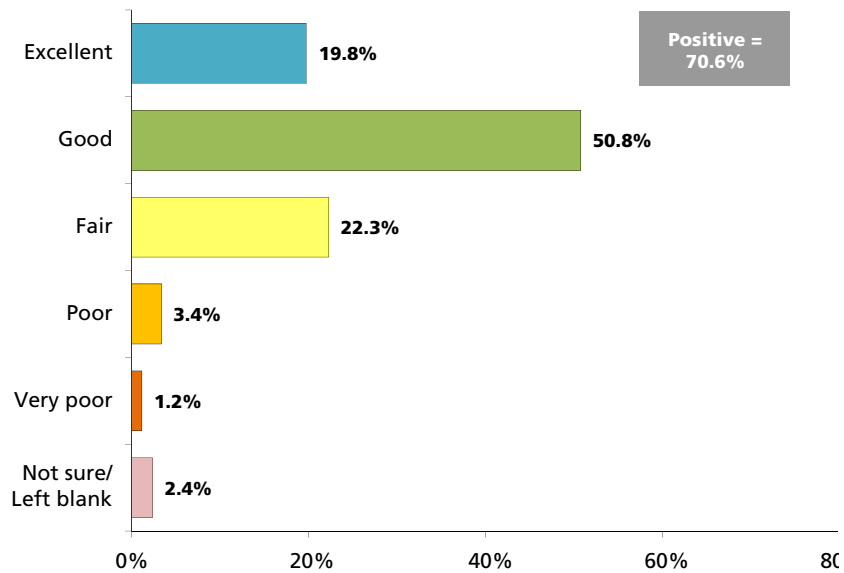
2.3 Local Economy

The next section of the survey focused on Carlsbad’s local economy, which includes the shopping, dining, and services available in the City as well as the quantity and quality of jobs found in Carlsbad.

Shopping, Dining, and Services

Twenty percent of residents rated the shopping, dining, and services available in Carlsbad as “Excellent” and the majority (51%) rated them as “Good.” Overall, 71 percent of residents provided a positive rating for Carlsbad’s available shopping, dining, and services, 22 percent provided a neutral rating, and five percent provided a negative rating.

Figure 7. Ratings for the Shopping, Dining, and Services Available in Carlsbad



To follow is an examination of ratings for the shopping, dining, and services available in Carlsbad by sub-groups.

- Ratings for the shopping, dining, and services available in Carlsbad were positively correlated with a number of other variables throughout the survey, including: neighborhood and city-wide quality of life ratings; the quality and quantity of jobs in Carlsbad; ratings for aspects of Carlsbad's natural environment; and ratings for aspects of the City's social setting.
- A regression analysis revealed the following as the top predictors of residents' perceptions regarding the shopping, dining, and services available in Carlsbad:
 - Ratings for community events and facilities in Carlsbad;
 - Ratings for the quality and quantity of jobs available in Carlsbad;
 - Rating for the quality of life in the entire City of Carlsbad; and
 - Identifying with Smith that Carlsbad should increase the number of stores, restaurants, and other businesses within the City.
- Residents in zip code 92008 were the most likely to rate the shopping, dining, and services available as "Excellent," whereas those in 92011 were the most likely to rate them as "Fair" ("Excellent" or "Good"; 92008: 73%, 92009: 71%, 92010: 71%, 92011: 67%).
- Residents who have lived in Carlsbad less than 10 years provided lower ratings than those who have lived in Carlsbad 10 years or more (68% vs. 74%).
- As one might expect, residents who reported locations outside of Carlsbad as their favorite places to shop or dine rated Carlsbad less favorable than those who cited places within Carlsbad (42% positive rating vs. 71%).
- Residents who cited The Forum at Carlsbad as their favorite place to shop or dine were less positive (72% "Excellent" or "Good") than those who cited Plaza Camino Real (80%), The Village (79%), or Carlsbad Premium Outlets (76%).
- Seventy-six percent of respondents who felt Carlsbad should limit the number of stores, restaurants, and businesses rated the shopping, dining, and services available in Carlsbad favorably compared with 64 percent who felt Carlsbad should increase the number of stores, restaurants, and businesses.
- Compared with owners, a higher percentage of renters rated the shopping, dining, and services available as "Excellent" or "Good."

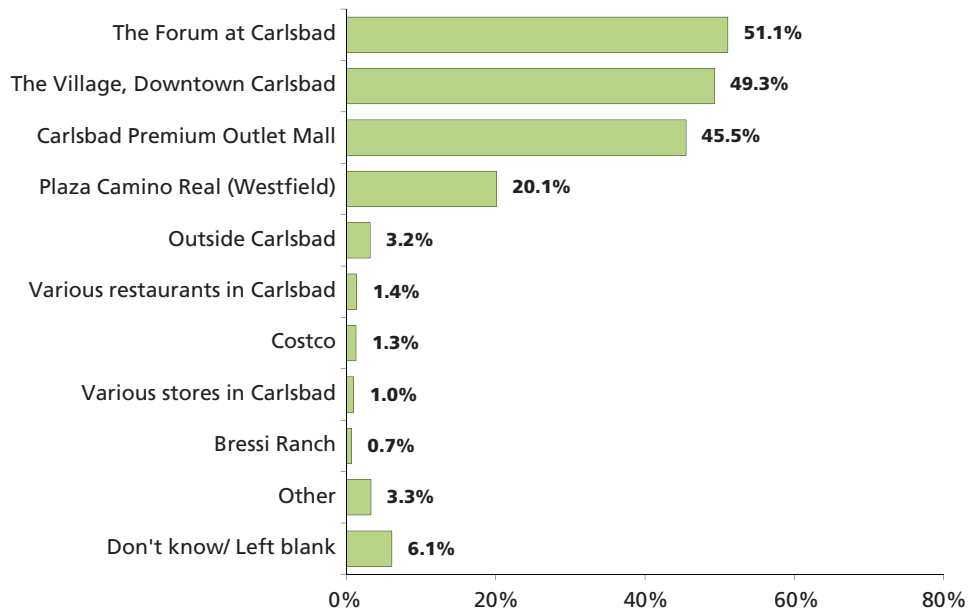


- Residents in the 18 to 24 year group as well as those 65 years and older provided the most favorable ratings, whereas those 35 to 44 years of age provided the lowest.
- Residents without children were more likely to rate the shopping, dining, and services available favorably as compared to those with children (73% vs. 67%).
- Compared with respondents in other ethnic groups, Asian and Pacific Islander respondents were the least likely to rate the shopping, dining, and other services available in Carlsbad as "Excellent" or "Good."
- Residents on the two ends of the household income spectrum, those earning less than \$25,000 and those earning more than \$175,000, provided lower ratings than those making between \$25,000 and \$175,000.

Favorite Places to Shop and Dine

When asked about their favorite places to shop and dine in Carlsbad, 51 percent of respondents cited The Forum at Carlsbad, 49 percent indicated The Village in Downtown Carlsbad, and 46 percent cited the Carlsbad Premium Outlet Mall.

Figure 8. Favorite Places to Shop and Dine in Carlsbad[‡]



[‡] For this question, respondents were free to mention multiple responses; therefore, the percentages in the figure total more than 100 percent.

- The majority of residents with a household income greater than \$75,000 cited The Forum at Carlsbad as their favorite place to shop or dine, with 63 percent of those making \$175,000 or more citing The Forum. The majority of residents earning \$100,000 or less cited The Village as their favorite place to shop or dine in Carlsbad.
- As one would expect, The Forum was the most popular among residents of zip codes 92009 and 92011, whereas The Village was the most popular among those in 92008 and 92010.
- Respondents with children were much more likely to cite the Carlsbad Premium Outlet Mall or The Forum as their favorite place to shop or dine, whereas those without children were much more likely to cite The Village.

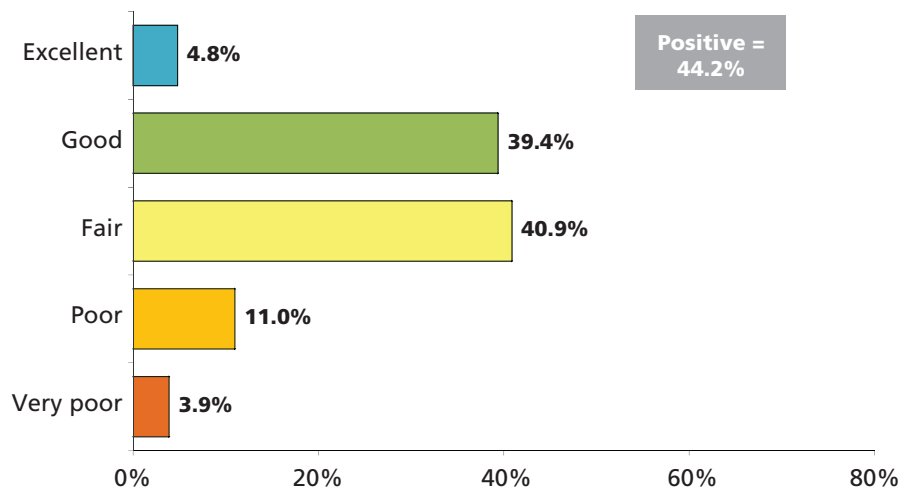
Quality and Quantity of Jobs

Respondents were next asked to rate the quality and quantity of jobs available in Carlsbad. Overall, 31 percent of respondents were not sure or left this question blank, which was higher than any other question in the survey.

The figure below shows the percentage breakdown after filtering out the not sure responses (see Appendix A for the original breakdown). Among those who provided an opinion, 44 percent of respondents rated the quality and quantity of jobs available in Carlsbad as either “Excellent” (5%) or “Good” (39%).

Most respondents rated the quality and quantity of jobs as “Fair” (41%) and 15 percent rated it as “Poor” (11%) or “Very poor” (4%).

Figure 9. Ratings for the Quality and Quantity of Jobs Available in Carlsbad





- Demographically, respondents in the following sub-groups were more likely than their counterparts to indicate they were “Not sure” or declined to comment on the quality and quantity of jobs available in Carlsbad.
 - Residents in zip codes 92009 and 92011;
 - Homeowners;
 - Female respondents;
 - Residents 55 and older;
 - Those without children.

Below is an assessment of views on the quality and quantity of jobs available by resident sub-groups. Please note that all percentages reported are among those who provided an opinion.

- Ratings for the quality and quantity of jobs in Carlsbad were positively correlated with a number of other variables throughout the survey, including: neighborhood and city-wide quality of life ratings; shopping, dining, and services available in Carlsbad; ratings for aspects of Carlsbad’s natural environment, and ratings for aspects of the City’s social setting.
- A regression analysis revealed the following as the top predictors of residents’ views on the quality and quantity of jobs available in Carlsbad.
 - Ratings for the shopping, dining, and services available in Carlsbad;
 - Ratings for the lifelong learning opportunities and services in Carlsbad; and
 - Household income.
- Residents who have lived in Carlsbad 15 years or more were the most likely to provide a positive rating (49%), whereas those who have been in Carlsbad less than one year were the most likely to report a negative rating (22%).
- There were no statistically significant differences in ratings for the quality and quantity of jobs available in Carlsbad by zip code.
- A higher percentage of owners reported a positive rating (46% vs. 39%), whereas a higher percentage of renters reported a negative rating (20% vs. 13%).
- Compared with other ethnicities, Latino(a) or Hispanic respondents were the most likely to rate the quality and quantity of jobs available as “Fair” (51%).
- The majority of respondents with a household income more than \$100,000 a year rated the quality and quantity of jobs available as “Excellent” or “Good.” Comparatively, 24 percent of those with a household income below \$25,000 provided a positive rating, with 38 percent of this group reporting a negative rating.

Number One Way to Improve the City's Economy

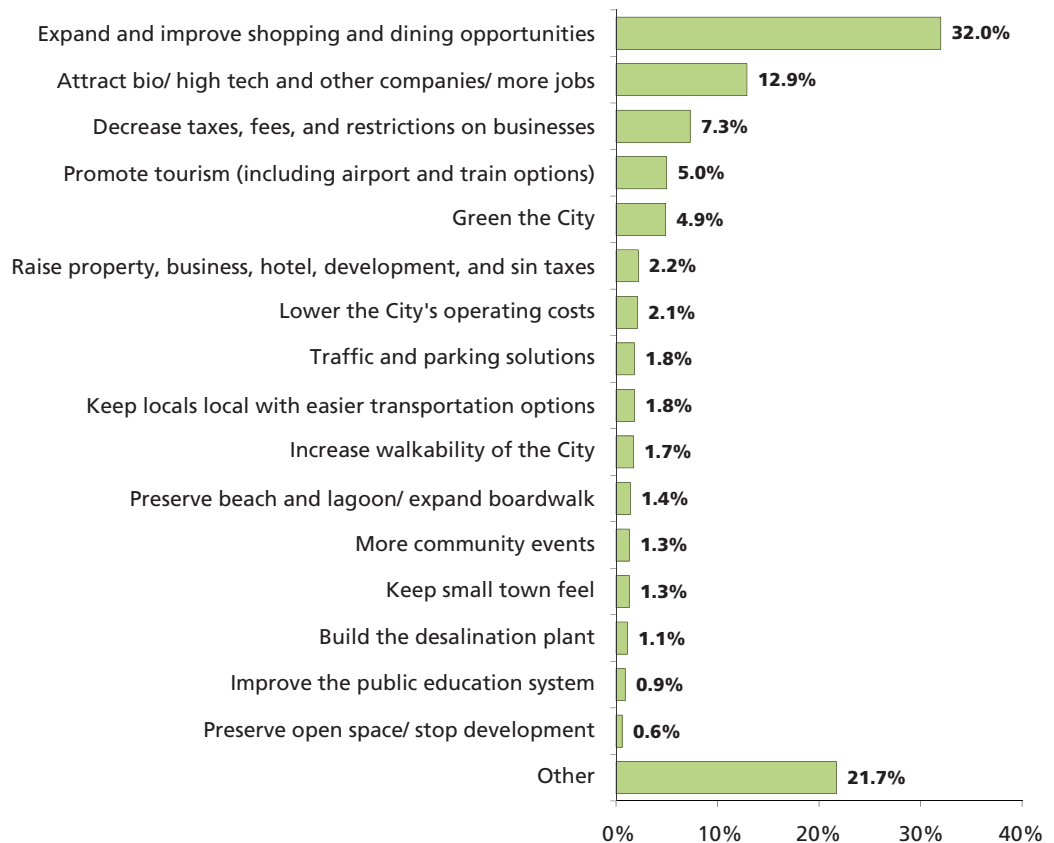
Respondents were next asked in an open-ended format³ to identify the number one way that Carlsbad could improve the City's economy.

Overall, 36 percent of respondents wrote in a response to this question. The percentages below are among the 36 percent, or 2,615 residents who provided a response.

After coding the verbatim responses, expanding and improving shopping and dining opportunities was by far the most popular response at 32 percent. Attracting bio/ high technology and other companies and increasing jobs was second at 13 percent and decreasing taxes, fees, and restrictions on businesses was third at seven percent.

Responses related to expanding and improving shopping and dining opportunities were varied and included: improve Westfield Mall, more independent restaurants and stores, reinvigorate the Village, increase shopping options, need a Walmart/ more big-box stores, better restaurants, more cafes and outdoor lounges, and more grocery stores.

Figure 10. Number One Way to Improve the City's Economy[‡]



[‡] For a more detailed breakdown of responses, please refer to the Topline Results in Appendix A.

³ Open-ended questions are those where respondents are free to write in any response without being constrained to choose from a list. Prior to analysis, the verbatim responses were coded into categories based on the similarity of responses.



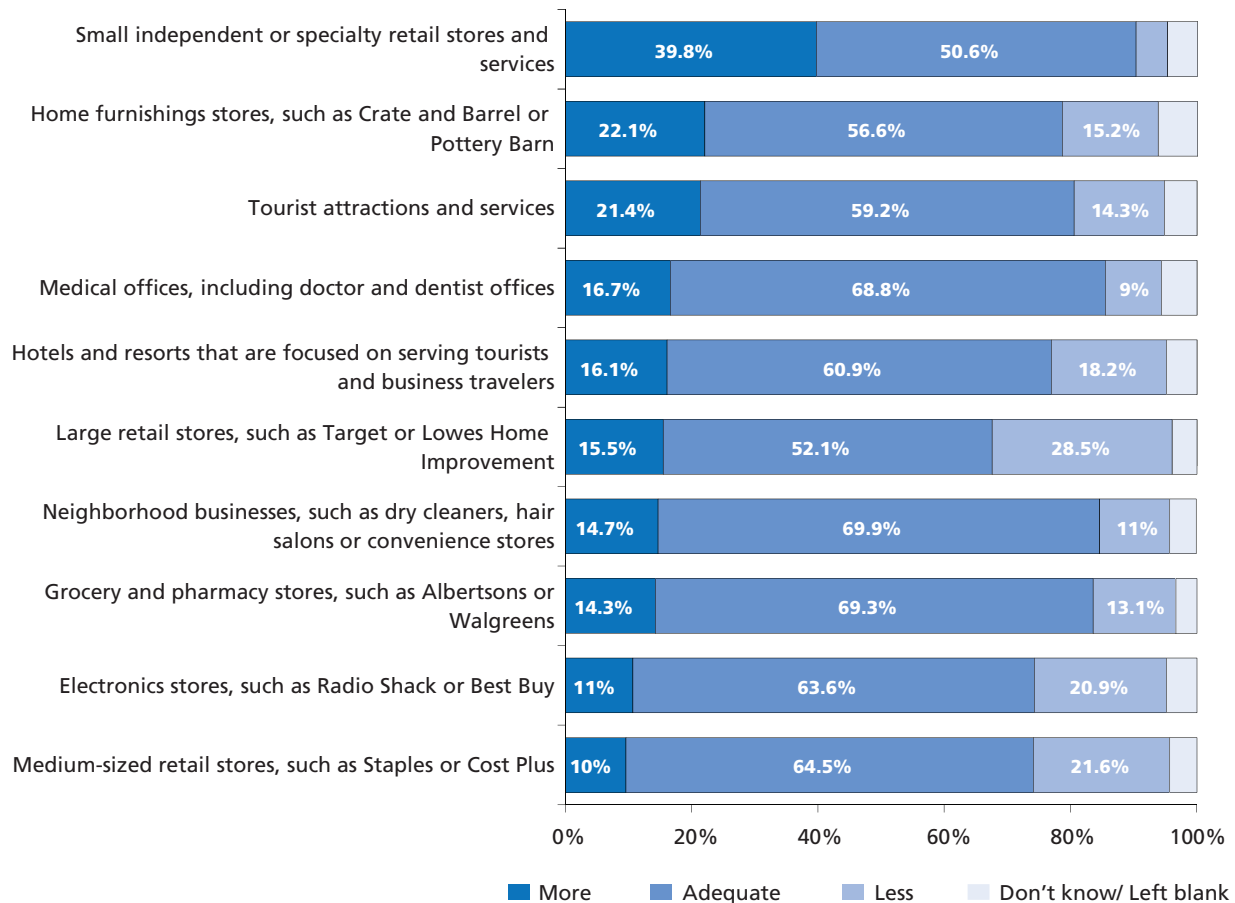
Preferences for Stores and Businesses In Carlsbad

The next question of the survey presented respondents with a list of various types of stores or businesses that could be, or are currently located in Carlsbad. Respondents were then asked to indicate whether they would like to see more or less of each type of business or whether they thought there was currently an adequate amount.

Forty percent of residents would like to see more “Small independent or specialty retail stores and services” in Carlsbad. Approximately one in five residents would like to see more “Home furnishings stores, such as Crate and Barrel or Pottery Barn” (22%) and “Tourist attractions and services” (21%).

Twenty-nine percent of residents would like to see less “Large retail stores, such as Target or Lowes Home Improvement,” 22 percent wanted to see fewer “Medium-sized retail stores, such as Staples or Cost Plus,” and 21 percent would like to see fewer “Electronics stores, such as Radio Shack or Best Buy.”

Figure 11. Preferences for Stores and Businesses in Carlsbad



Opinion Closest to Own: View on Number of Stores, Restaurants, and Businesses in Carlsbad

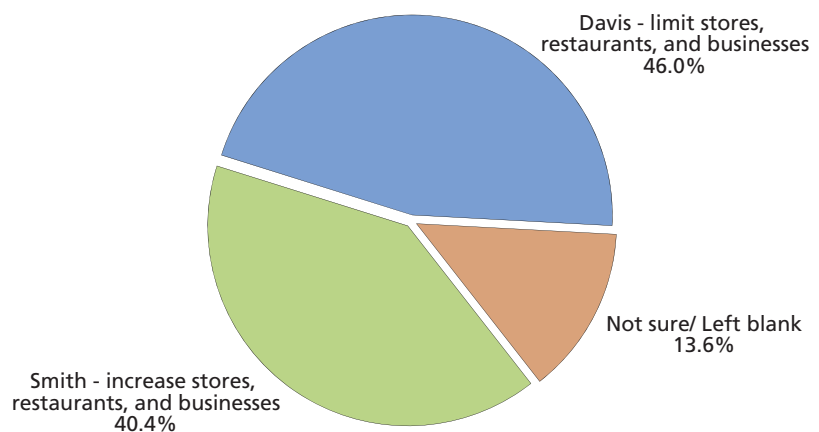
Residents were presented with the opinions of two neighbors who live in Carlsbad and who disagree about the value of increasing the number of businesses and stores in Carlsbad and the role they play in funding public services and facilities in the City of Carlsbad.

Below are the opinions of the two neighbors:

- Smith believes that Carlsbad should be willing to increase the number of stores, restaurants and other businesses within the City because they will provide more services, shopping, and dining opportunities for residents and generate more money for the City to fund city services such as fire protection, police, parks, and library services.
- Davis believes that Carlsbad should limit the number of stores, restaurants and other businesses within the City to help stop increasing traffic, congestion, and pollution in Carlsbad, which are more costly to Carlsbad residents than the tax revenue that is generated by the businesses.

After reading each neighbor's opinion, residents were asked to select the opinion closest to their own. Forty-six percent agreed with Davis that Carlsbad should limit the number of stores, restaurants, and other businesses within the City and 40 percent agreed with Smith that Carlsbad should be willing to increase the number of stores, restaurants, and other businesses. Additionally, 14 percent of residents were not sure which opinion was closer to their own.

Figure 12. Opinion Closest to Own – Number of Stores, Restaurants, and Businesses





To follow is an examination of the differences in opinions regarding the number of stores, restaurants, and other businesses in Carlsbad by sub-groups.

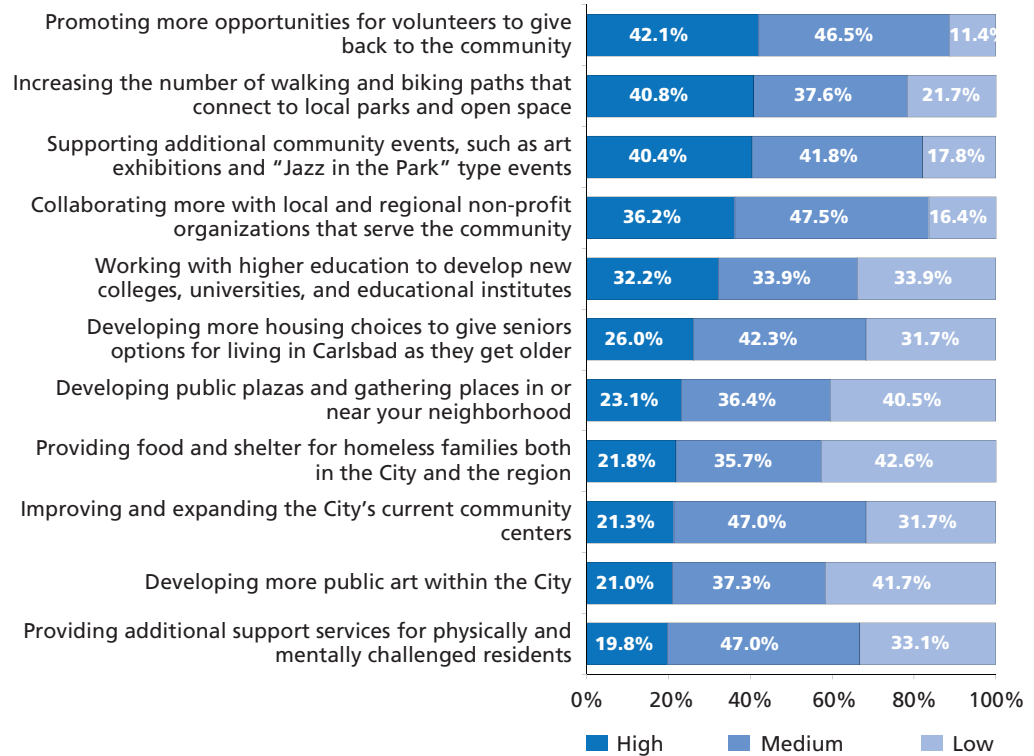
- Residents in zip code 92009 were the most likely to believe that Carlsbad should increase the number of stores, restaurants, and other businesses within the City, whereas residents in each of the other zip codes were more likely to feel they should be limited.
- Respondents who have lived in Carlsbad less than 10 years were more likely to agree with Smith that Carlsbad should increase the number of stores, restaurants, and businesses, whereas those who have lived in the City at least 10 years were more likely to agree with Davis that they should be limited.
- Compared with women, men were more likely to indicate that Carlsbad should increase the number of stores, restaurants, and businesses.
- The majority (51%) of residents with a household income greater than \$175,000 a year felt the City should increase the number of stores, restaurants, and other businesses within the City.

2.4 Program and Facility Priorities

The next section of the survey presented respondents with 11 programs or facilities being considered for improvement or development within Carlsbad and asked them to assign a prioritization to each.

Among those who provided a response, “Promoting more opportunities for volunteers to give back to the community” (42% “High priority”), “Increasing the number of walking and biking paths that connect to local parks and open space” (41%), and “Supporting additional community events, such as local art exhibitions and ‘Jazz in the Park’ type of events in the City” (40%) were viewed as high priorities by approximately four in ten respondents.

Figure 13. Program and Facility Priorities[‡]



[‡] The figure is sorted by the percentage "High priority."

Due to the higher than average percentage of "Don't know/ Left blank" responses for many items, those responses have been filtered out of the analysis for this series. The high percentage of "Don't know/ No answer" is likely due to residents' lack of direct experience with those specific services or concepts.

To follow is an examination of the differences in "High priority" ratings by sub-groups.

- Compared to those who have lived in the City longer, the newest residents - those who have only been in Carlsbad less than one year – were more likely to rate each of the following as a "High priority":
 - "Supporting additional community events, such as local art exhibitions and 'Jazz in the Park' type of events in the City,"
 - "Collaborating more with local and regional non-profit organizations that serve the community,"
 - "Working with higher educational institutions, to develop new colleges, universities, and educational institutes in Carlsbad,"
 - "Providing food and shelter for homeless families both in the City and the region,"
 - "Improving and expanding the City's current community centers,"



- "Developing more public art within the City," and
- "Providing additional support services for physically and mentally disabled residents."
- Residents in zip code 92011 were the least likely to rate supporting additional community events as a high priority (37%).
- Residents in zip codes 92009 and 92010 were more likely to place a high priority on "Improving and expanding the City's current community centers" than residents in 92008 and 92011.
- A higher percentage of renters rated each item as a "High priority" than owners.
- Women assigned higher priority ratings across the items than men.
- As one might expect residents 55 to 64 years of age (36%) and those 65 and older (41%) provided higher than average priority ratings for "Developing more housing choices within Carlsbad to give seniors additional options for living in Carlsbad as they get older."
- Residents with children were more likely than those without children to rate each of the following as a "High priority":
 - "Increasing the number of walking and biking paths that connect to local parks and open space,"
 - "Supporting additional community events, such as local art exhibitions and 'Jazz in the Park' type of events in the City,"
 - "Working with higher educational institutions, to develop new colleges, universities, and educational institutes in Carlsbad,"
 - "Developing public plazas and gathering places in or near your neighborhood,"
 - "Improving and expanding the City's current community centers."
- Conversely, those without children were more likely than those with children to rate each following as a "High priority":
 - "Developing more housing choices within Carlsbad to give seniors additional options for living in Carlsbad as they get older,"
 - "Providing food and shelter for homeless families both in the City and the region," and
 - "Providing additional support services for physically and mentally disabled residents."

2.5 Carlsbad’s Social Setting

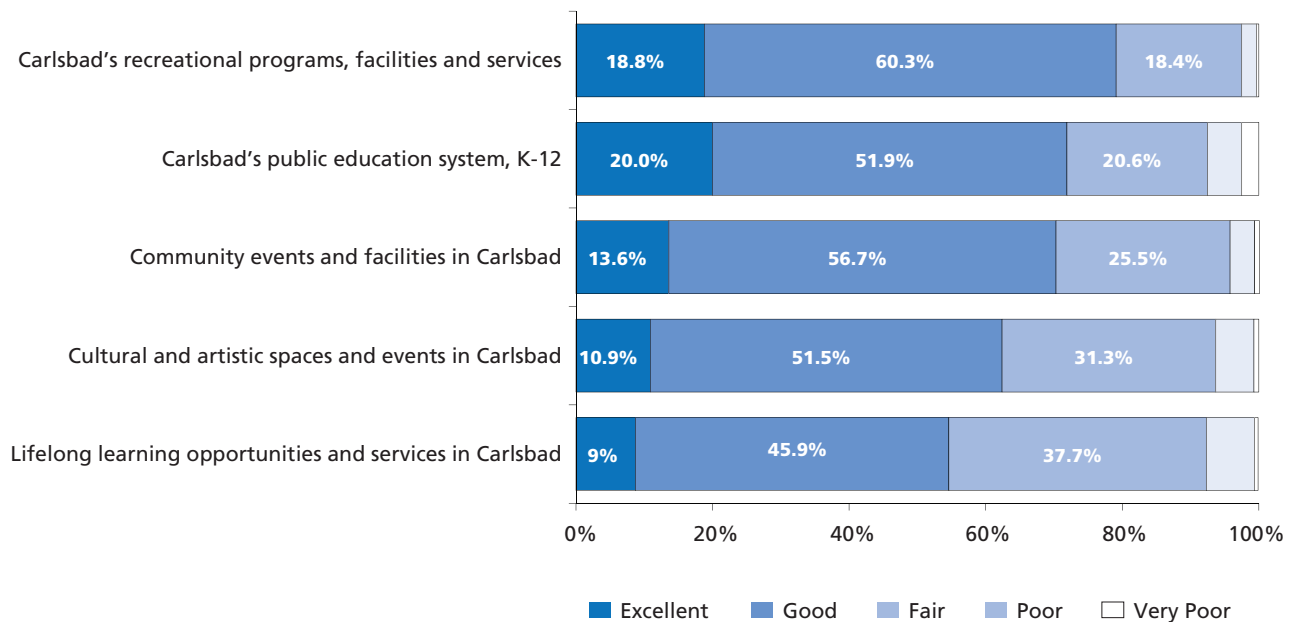
The last substantive section of the survey asked respondents to rate various aspects of Carlsbad’s social setting, which includes recreational programs within the City, community and educational activities available in Carlsbad, as well as artistic and cultural spaces and events in Carlsbad.

Among those who provided an opinion, over 70 percent rated each of the following favorably, as “Excellent” or “Good”:

- “Carlsbad’s recreational programs, facilities, and services” (79%),
- “Carlsbad’s public education system, kindergarten through 12th grade” (72%), and
- “Community events and facilities in Carlsbad” (70%).

Sixty-two percent of residents who gave an opinion rated the “Cultural and artistic spaces and events in Carlsbad” favorably and 55 percent rated “Lifelong learning opportunities and services in Carlsbad” as either “Excellent” or “Good.”

Figure 14. Ratings for Aspects of Carlsbad’s Social Setting[‡]



[‡] Due to the higher than average percentage of “Don’t know/ Left blank” responses for many items, those responses have been filtered out of the analysis for this series. The high percentage of “Don’t know/ No answer” is likely due to residents’ lack of direct experience with those specific services or concepts.



To follow is an examination of the differences in ratings for the various aspects of Carlsbad's social setting by sub-groups (all percentages are among those who provided an opinion).

- Residents in the coastal zip codes, 92008 and 92011, provided higher positive ratings for Carlsbad's recreational programs, facilities, and services than those in the inland zip codes, 92009 and 92010.
- Compared with residents in other zip codes, those in 92010 were much more likely to rate the cultural and artistic spaces and events in Carlsbad favorably.
- Respondents who have lived in Carlsbad for 15 years or more were the most likely to rate Carlsbad's recreational programs, facilities, and services favorably.
- Residents who have lived in the City 10 years or more provided higher than average positive ratings for:
 - "Community events and facilities in Carlsbad" (73%),
 - "Cultural and artistic spaces and events in Carlsbad" (66%), and
 - "Lifelong learning opportunities and services in Carlsbad" (58%).
- With the exception of Carlsbad's public education system where there was no statistical difference between men and women, female respondents rated each aspect of Carlsbad's social setting more favorably than men.
- Compared with those in other age groups, residents 65 and older provided the most favorable ratings across the items.
- Residents without children provided much higher positive ratings to Carlsbad's public education system than those with children in their household (76% vs. 68%).

Number One Way to Improve the City's Social Setting

Carlsbad residents were next asked in an open-ended format⁴ to identify the number one way that Carlsbad could improve the City's social setting.

Overall, 28 percent of respondents wrote in a response to this question. The percentages presented below are among the 28 percent, or 1,977 residents who provided a response.

After coding the verbatim responses into groups, the top three response categories were "Increase parks and recreation facilities and activi-

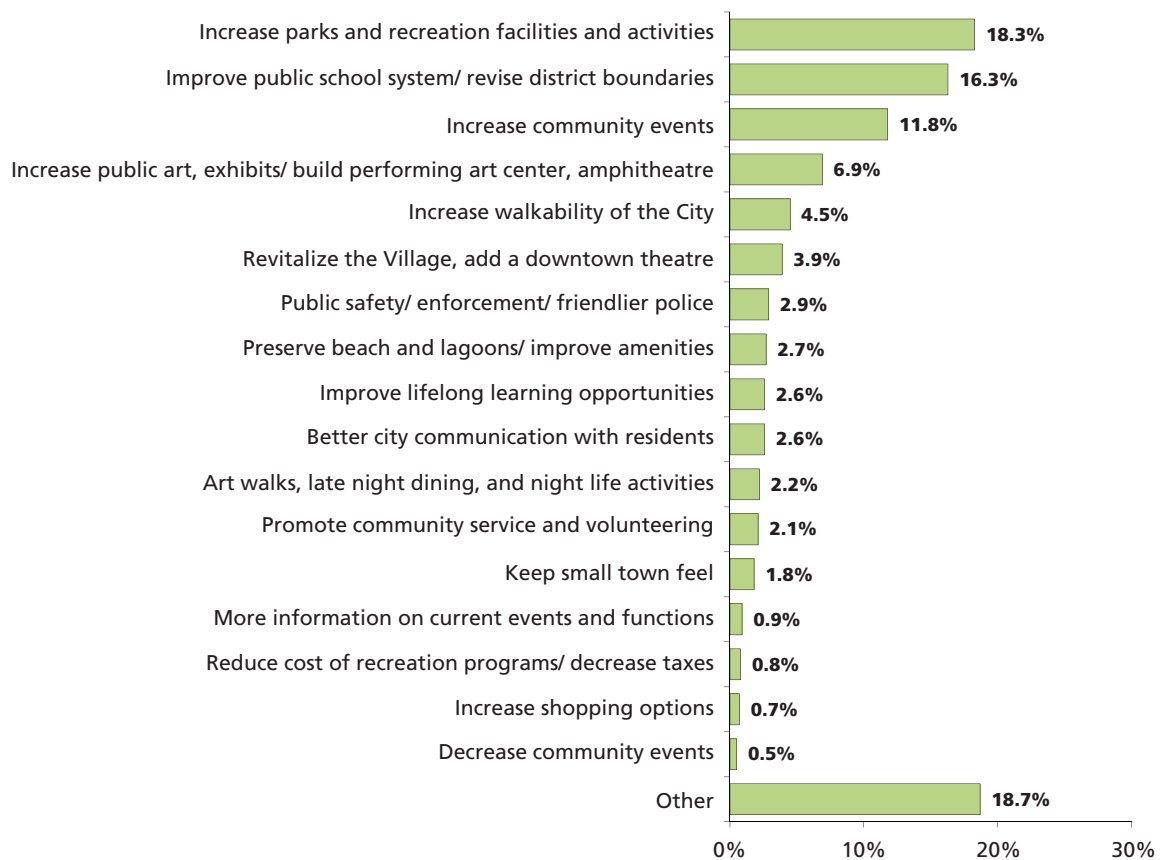
⁴ Open-ended questions are those where respondents are free to write in any response without being constrained to choose from a list. Prior to analysis, the verbatim responses were coded into categories based on the similarity of responses.

ties” (18%), “Improve public school system/ revise district boundaries” (16%), and “Increase community events” (12%).

Responses in the parks and recreation facilities and activities category were varied and included topics such as: build an amphitheatre, build the swim complex, increase recreation facilities, increase neighborhood parks, more activities for teenagers, more senior programs and transportation options, more dog parks, more activities for the 20 to 30 age group, and build a skate park.

Responses in the increase community events category included general responses as well as specific requests for more music in the park, barbeques, and dances.

Figure 15. Number One Way to Improve the City’s Social Setting[‡]



[‡] For a more detailed breakdown of responses, please refer to the Topline Results in Appendix A.



3 METHODOLOGY

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

Method	Mail Survey (English and Spanish) and Web Survey (English)
Universe	79,791 Residents 18 years and Older within the City of Carlsbad
Number of Respondents	7,167 Residents Completed a Survey
Average Length	15 minutes
Field Dates	March 6 – May 1, 2009
Margin of Error	The <i>maximum</i> margin of error for questions answered by all 7,167 respondents was +/-1.1% at the 95% level of confidence.

3.1 Research Objectives

Prior to beginning the project, BW Research met with the City of Carlsbad and Dyett & Bhatia to determine the research objectives for the study. The main research objectives of the study were to:

- assess residents’ perceptions regarding the quality of life in their neighborhood as well as within the entire City of Carlsbad;
- evaluate residents’ perceptions regarding Carlsbad’s natural environment, local economy, and social setting; and
- identify residents’ program and facility priorities.

3.2 Questionnaire Design

Through an iterative process and in consultation with the Envision Carlsbad Citizens' Committee (EC³), BW Research worked closely with the City and Dyett & Bhatia 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.

3.3 Sampling Method

The City of Carlsbad utilized a census-style approach to ensure that all residents had an equal opportunity to participate in the survey process. An introductory letter and survey were mailed to every household within the City of Carlsbad (41,643 households). The introductory letter provided residents with the option of completing the hard copy survey and mailing it back via the enclosed return envelope (postage paid) or visiting the survey url and completing the survey online. In total, 296 residents completed a survey online and 6,871 returned a survey through the mail resulting in a response rate of 17.2 percent for the study. The data collection period for the project was March 6 through May 1, 2009.

3.4 Data Processing

Prior to analysis, BW Research utilized optical mark recognition software and implemented quality control measures to scan the returned mail surveys into an electronic database and coded all the open-ended responses into categories for analysis. BW Research also examined the demographic characteristics of the 7,167 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) 2008 demographic estimates for the City of Carlsbad. It is estimated that among Carlsbad's 103,811 residents, 79,791 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.

3.5 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 +/-0.66 percent and +/- 1.10 percent (depending on the distribution of each question) for questions answered by all 7,167 respondents. However, it is important to note that analysis of sub-groups (such as examining differences by length of residence or gender) will have a margin of error greater than +/-1.10 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.

4 APPENDIX A: TOPLINES

CITY OF CARLSBAD RESIDENT SURVEY Toplines (n=7,167) May 2009

In an effort to improve the quality of life in Carlsbad, the City is surveying Carlsbad residents to find out some of your priorities and opinions regarding our city. The survey is being processed by an independent research firm, and all of your individual responses will remain confidential.

If you have any questions about the survey or would like to receive the survey in Spanish, please contact Jennifer Jesser at (760) 602-4637.



**Traditional Rounding Rules Applied - Percentages Rounded to the Nearest Whole Number -
Percentages May Not Add to Exactly 100%**

1. How long have you lived in Carlsbad?

7%	Less than 1 year
22%	1 to 4 years
23%	5 to 9 years
17%	10 to 14 years
32%	15 years or more
1%	Don't know/ Left blank

2. Overall, how would you rate the quality of life in your neighborhood?

46%	Excellent
47%	Good
5%	Fair
1%	Poor
1%	Very poor
1%	Not sure/ Left blank

3. Overall, how would you rate the quality of life in the entire City of Carlsbad?

31%	Excellent
59%	Good
7%	Fair
1%	Poor
0%	Very poor
2%	Not sure/ Left blank

4. The City of Carlsbad is considering different priorities in planning for the City’s future.

For each priority listed below, please indicate if it should be a high priority, medium priority or low priority in thinking about Carlsbad’s future.

	<u>High</u>	<u>Medium</u>	<u>Low</u>	<u>Don't Know</u>
A. Providing parks and recreational facilities in the City for active recreational uses.....	48%	39%	11%	3%
B. Protecting undeveloped areas for hiking and exploring.....	62%	26%	11%	2%
C. Protecting natural habitats in and around Carlsbad.....	65%	25%	9%	2%
D. Creating new walking and biking trails within Carlsbad.....	43%	35%	20%	2%
E. Increasing revenue for the City to maintain and improve the services and programs that Carlsbad currently offers.....	26%	45%	23%	6%
F. Improving traffic flow in and around Carlsbad.....	37%	38%	22%	3%
G. Maintaining or improving property values within the City.....	55%	29%	12%	4%
H. Providing a range of housing options of different types & price levels within Carlsbad.....	21%	30%	46%	4%
I. Preserving historic buildings and places within Carlsbad.....	31%	41%	25%	3%

5. If there were one thing the City of Carlsbad should be focused on in the future to improve the quality of life for its residents, that has not already been mentioned, what would it be?

45% of respondents did not provide a response to this question.

The percentages below are among those who did provide a response (n=3,976).

7%	Stop development	1%	Improve the El Camino Real Mall
6%	Limit development	1%	Underground utility lines
5%	Preserve open space	1%	More trees/ better landscaping/ beautify City
5%	Public safety/ reducing crime	1%	Increase number of parks
5%	Improve public school system (includes revising school district boundaries)	1%	Build the new high school
3%	Remove power plant/ stop expansion	1%	Improve recycling program; larger bins at homes, bins in public areas
3%	Minimize traffic light wait times/ traffic flow	1%	Concentrate on senior issues
2%	Reinvigorate the Village	1%	Increase litter control/ maintain city areas
2%	Build the Desalination plant	1%	More hiking/ mountain bike trails
2%	Build the pool complex	1%	Infrastructure/ road repairs
2%	Increase recreational facilities and programs	1%	Priority to and discounts for Carlsbad residents over tourists
2%	Improve water quality of ocean	1%	Keep beaches clean/ more beach clean-ups
2%	Increase traffic law enforcement	1%	Keep beach parking free
2%	Better and safer bike paths for families and commuting/ finish rail trail	1%	Enforce dog waste/ leash laws
2%	Green the City/ green city operations	1%	Preserve Ponto Beach
2%	Rent control and more affordable housing	1%	Decrease airport noise
2%	Increase shopping and dining options	1%	Increase arts, culture, and nightlife
2%	Better and greener transit options	1%	Minimize low income housing
2%	Preserve small town feel	1%	Create a dog beach
1%	More dog parks/ trails	1%	Increase amenities at the beach
1%	Keep city financially strong	1%	Preserve remaining coastline
1%	Increase Walkability of the City	1%	Push for renewable energy use
1%	Lower taxes/ less regulation	1%	Preserve/ restore lagoons and their surroundings
1%	Remove illegal aliens/ transients	1%	Limit RV parking at beach and on city streets
1%	Increase water restrictions and conservation measures	1%	View preservation
1%	Increase beach parking/ beach access	17%	Other

CARLSBAD'S NATURAL ENVIRONMENT

Next, please think about Carlsbad's natural environment, which includes the City's air and water quality, protection and preservation of natural habitats and the quality and quantity of walking and biking trails within Carlsbad.

6. Generally speaking, how would you rate Carlsbad's:

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>	<u>Very Poor</u>	<u>Don't Know</u>
A. Air quality	31%	54%	10%	1%	0%	3%
B. Water quality	16%	51%	21%	6%	1%	5%
C. Protection and preservation of open spaces and natural habitats	16%	52%	19%	5%	3%	5%
D. Quality and quantity of Carlsbad's walking and biking trails	13%	48%	23%	5%	2%	9%

7. If there were one thing the City of Carlsbad could do to improve the City's natural environment, what would it be?

61% of respondents did not provide a response to this question.

The percentages below are among those who did provide a response (n=2,821).

- 15% Preserve open space
- 13% Stop development
- 7% Limit development
- 6% Better and safer bike paths for families and commuting/ finish rail trail
- 5% More hiking/ mountain bike trails
- 4% Preserve/ restore lagoons and their surroundings
- 4% Remove power plant/ stop expansion
- 3% Improve water quality of ocean
- 3% Increase water restrictions and conservation measures
- 3% More trees/ better landscaping/ beautify the City
- 2% Improve the tap water
- 2% Build the Desalination plant
- 2% Increase litter control/ maintain city areas
- 2% View preservation
- 2% Improve recycling program; larger bins at homes, bins in public areas
- 2% Enforce dog waste/ leash laws
- 1% Keep the beaches clean/ more beach clean-ups
- 1% Green the City/ green city operations
- 1% Increase Walkability of the City
- 1% Increase beach parking/ beach access
- 1% Push for renewable energy use
- 1% Preserve Ponto Beach
- 1% Interconnect open space and their trails
- 1% Remove illegal aliens/ transients
- 1% Preserve the Flower and Strawberry Fields
- 1% Preserve Calavera area including creek
- 1% Increase number of parks
- 1% Minimize traffic light wait times/ traffic flow
- 1% More dog parks/ trails
- 1% Public safety/ reducing crime
- 1% Preserve remaining coastline
- 1% Save Village H open space
- 1% Better and greener transit options
- 14% Other

8. Please consider the following statements that are being made about Carlsbad’s natural environment and indicate your level of agreement with each statement.

	<u>Strongly Agree</u>	<u>Agree</u>	<u>Neither</u>	<u>Disagree</u>	<u>Strongly Disagree</u>	<u>Don't Know</u>
A. The City of Carlsbad should be doing everything it can to fight global warming.....	28%	29%	16%	10%	11%	5%
B. Beaches, lagoons and other waterways in Carlsbad should be better protected with new regulations or stronger enforcement of current regulations	29%	34%	16%	10%	4%	7%
C. The City should be more actively involved in developing new renewable energy options within the City, such as solar roofs or wind turbines .	37%	38%	11%	7%	3%	5%
D. Carlsbad should limit residents’ access to some open space to protect and preserve the natural plants and animals that live in the City.....	20%	36%	15%	17%	7%	5%
E. Carlsbad should increase the fees associated with parks and recreation programs to fund the protection and maintenance of Carlsbad’s open space	9%	25%	19%	28%	13%	6%

LOCAL ECONOMY

Next, please think about Carlsbad’s local economy, which includes the shopping, dining and services available in the City as well as the quantity and quality of jobs found in Carlsbad.

9. Overall, how would you rate the shopping, dining and services available in Carlsbad?

- 20% Excellent
- 51% Good
- 22% Fair
- 3% Poor
- 1% Very poor
- 2% Not sure/ Left blank

10. Where are your favorite places to shop and dine in Carlsbad? Check all that apply

- 51% The Forum at Carlsbad
- 49% The Village, Downtown Carlsbad
- 46% Carlsbad Premium Outlet Mall
- 20% Plaza Camino Real (Westfield)
- 3% Outside Carlsbad
- 1% Various restaurants in Carlsbad
- 1% Costco
- 1% Various stores in Carlsbad
- 1% Bressi Ranch
- 3% Other
- 6% Don't know/ Left blank

11. Overall, how would you rate the quality and quantity of jobs available in Carlsbad?

- 3% Excellent
- 27% Good
- 28% Fair
- 8% Poor
- 3% Very poor

12. If there were one thing the City of Carlsbad could do to improve the City’s economy, what would it be?

64% of respondents did not provide a response to this question.

The percentages below are among those who did provide a response (n=2,615).

- 12% Improve Westfield Mall (on El Camino Real)
- 8% Attract bio/ high tech and other companies to Carlsbad
- 7% Decrease taxes, fees, and restrictions on businesses
- 6% More independent restaurants and stores
- 6% Reinvigorate the Village
- 5% More jobs
- 4% Increase shopping options
- 3% Promote tourism
- 2% Better restaurants
- 2% Lower the City's operating costs
- 2% Keep locals local with easier transportation options
- 2% Green city operations
- 2% Increase Walkability of the city
- 2% Push for the use of renewable energy
- 1% Sell the golf course
- 1% Keep small town feel
- 1% More community events
- 1% Increase use of Carlsbad airport
- 1% Need a Walmart/ more big-box stores
- 1% Traffic and parking solutions
- 1% More grocery stores
- 1% Build the desalination plant
- 1% Attract green businesses
- 1% Improve the public education system
- 1% Raise property, business, and development taxes
- 1% Increase Beach and Lagoon preservation programs
- 1% Add/ expand the boardwalk
- 1% More downtown parking
- 1% Raise hotel tax
- 1% Preserve open space/ stop development
- 1% Increase Coaster and Amtrak stops
- 22% Other

13. Below is a list of stores and businesses that could be, or are currently, located in Carlsbad. Please indicate whether you would like to see more or less of each type of business in Carlsbad.

	<u>More</u>	<u>Adequate</u>	<u>Less</u>	<u>Don't Know</u>
A. Large retail stores, such as Target or Lowes Home Improvement	16%	52%	29%	4%
B. Medium-sized retail stores, such as Staples or Cost Plus	10%	65%	22%	4%
C. Grocery and pharmacy stores, such as Albertsons or Walgreens.....	14%	69%	13%	3%
D. Neighborhood businesses, such as dry cleaners, hair salons or convenience stores..	15%	70%	11%	4%
E. Small independent or specialty retail stores and services	40%	51%	5%	5%
F. Medical offices, including doctor and dentist offices	17%	69%	9%	6%
G. Home furnishings stores, such as Crate and Barrel or Pottery Barn	22%	57%	15%	6%
H. Electronics stores, such as Radio Shack or Best Buy	11%	64%	21%	5%
I. Hotels and resorts that are focused on serving tourists and business travelers.....	16%	61%	18%	5%
J. Tourist attractions and services	21%	59%	14%	5%

14. Below are the opinions of two neighbors, Smith and Davis, who live in Carlsbad. Smith and Davis disagree about the value of increasing the number of businesses and stores in Carlsbad and the role they play in funding public services and facilities in the City of Carlsbad.

Smith believes that Carlsbad should be willing to increase the number of stores, restaurants and other businesses within the City because they will provide more services, shopping and dining opportunities for residents and generate more money for the City to fund city services such as fire protection, police, parks and library services.

Davis believes that Carlsbad should limit the number of stores, restaurants and other businesses within the City to help stop increasing traffic, congestion and pollution in Carlsbad, which are more costly to Carlsbad residents than the tax revenue that is generated by the businesses.

Whose opinion is closer to your own?

- 40% Smith, increase the number of stores, restaurants and other businesses within the City
- 46% Davis, limit the number of stores, restaurants and other businesses within the City
- 14% Not sure/ Left blank

PROGRAM AND FACILITY PRIORITIES

15. Please place a priority level on each of the following programs and facilities being considered for improvement or development in Carlsbad.

	<u>High</u>	<u>Medium</u>	<u>Low</u>	<u>Don't Know</u>
A. Improving and expanding the City's current community centers	20%	43%	29%	8%
B. Developing public plazas and gathering places in or near your neighborhood.....	22%	35%	39%	5%
C. Increasing the number of walking and biking paths that connect to local parks and open space	39%	36%	21%	4%
D. Providing food and shelter for homeless families both in the City and the region	20%	33%	40%	7%
E. Supporting additional community events, such as local art exhibitions and "Jazz in the Park" type of events in the City.....	39%	41%	17%	3%
F. Developing more public art within the City.....	20%	36%	40%	4%
G. Providing additional support services for physically & mentally disabled residents.....	17%	41%	29%	13%
H. Developing more housing choices within Carlsbad to give seniors additional options for living in Carlsbad as they get older.....	24%	40%	30%	7%
I. Working with higher educational institutions, to develop new colleges, universities and educational institutes in Carlsbad	31%	32%	32%	5%
J. Promoting more opportunities for volunteers to give back to the community	40%	44%	11%	5%
K. Collaborating more with local and regional non-profit organizations that serve the community	33%	43%	15%	9%

CARLSBAD'S SOCIAL SETTING

Next, please think about Carlsbad's social setting, which includes recreational programs within the City, community and educational activities available in Carlsbad, as well as artistic and cultural spaces and events in Carlsbad.

16. Overall, how would you rate the different aspects of Carlsbad's social setting?

	<u>Excellent</u>	<u>Good</u>	<u>Fair</u>	<u>Poor</u>	<u>Very Poor</u>	<u>Don't Know</u>
A. Carlsbad's recreational programs, facilities and services	17%	55%	17%	2%	0%	9%
B. Carlsbad's public education system, kindergarten through 12th grade	14%	37%	15%	4%	2%	28%
C. Cultural and artistic spaces and events in Carlsbad	10%	47%	28%	5%	1%	10%
D. Lifelong learning opportunities and services in Carlsbad	7%	37%	30%	6%	0%	19%
E. Community events and facilities in Carlsbad	12%	52%	23%	3%	1%	9%

17. If there were one thing the City of Carlsbad could do to improve the City's social setting, what would it be?

72% of respondents did not provide a response to this question.

The percentages below are among those who did provide a response (n=1,977).

16%	Improve public school system (includes revising school district boundaries)
7%	Increase public art, build performing art center, exhibits
6%	Increase community events
6%	Build an amphitheatre
5%	Music in the Park
5%	Increase walkability of the City
4%	Revitalize the Village, add a downtown theatre
3%	Build the swim complex
3%	Better city communication with residents
3%	Increase recreation facilities
2%	Art walks, late night dining, and nigh life activities
2%	Promote community service and volunteering
2%	Improve lifelong learning opportunities
2%	Increase neighborhood parks
2%	Keep small town feel
2%	Need friendlier police
1%	More senior programs and transportation options
1%	More activities for teenagers
1%	Protect and preserve the beaches
1%	BBQ's and dances
1%	Increase beach access
1%	More dog parks
1%	More information on current events and functions
1%	Remove illegal aliens and the homeless
1%	More activities for the 20-30 age group
1%	Reduce cost of recreation programs, decrease taxes
1%	Increase shopping options
1%	Decrease community events
1%	Improve libraries
1%	Build a skate park
20%	Other

DEMOGRAPHICS

Your demographic information will be kept confidential and all data will be displayed in summary format only.

A. Do you own or rent the unit in which you live?

22%	Rent
77%	Own
2%	Refused/ Left blank

B. Are you:

44%	Male
53%	Female
4%	Refused/ Left blank

C. In what year were you born? Recoded into Age

11%	18 to 24 years
11%	25 to 34 years
17%	35 to 44 years
21%	45 to 54 years
16%	55 to 64 years
17%	65 years or older
8%	Refused/ Left blank

D. How many children in each of the age groups below live within your household?

Data shown are percentages of respondents with children in each age category within household.

17%	Children 0 to 5 years old
15%	Children 6 to 12 years old
12%	Children 13 to 17 years old
58%	No children
7%	Refused/ Left blank

Total Number of Children in Household

16%	One
15%	Two
4%	Three or more
58%	None
7%	Refused/ Left blank

E. Including yourself, how many adults in each of the following age groups live within your household?

Data shown are percentages of respondents with adults in each age category within household.

11%	Adults 18 to 24 years old
14%	Adults 25 to 34 years old
19%	Adults 35 to 44 years old
24%	Adults 45 to 54 years old
15%	Adults 55 to 64 years old
17%	Adults 65 years and older
19%	Refused/ Left blank

Total Number of Adults in Household

- 24% One
- 48% Two
- 9% Three or more
- 19% Refused/ Left blank

F. What do you typically use to communicate with people outside of your household? Check All That Apply

- 82% Email
- 81% Cellular or mobile phone
- 55% Phone - not cellular or mobile
- 41% Traditional mail
- 36% Text messaging
- 2% Word of mouth/ face-to-face communication
- 2% Internet-based communication – Facebook, Skype, MySpace
- 0% Other
- 3% Don't know/ Left blank

G. What ethnic group do you consider yourself a part of or feel closest to?

- 4% Latino(a) or Hispanic
- 5% Asian
- 1% African American or Black
- 1% Pacific Islander
- 79% White
- 5% Other
- 5% Refused/ Left blank

H. Which of the following best describes your total household income for the last 12 months?

- 4% Below \$25,000
- 13% \$25,000 to \$50,000
- 15% \$50,001 to \$75,000
- 16% \$75,001 to \$100,000
- 27% \$100,001 to \$175,000
- 16% More than \$175,000
- 9% Don't know/ Refused

If you are interested in participating in future research sponsored by the City of Carlsbad, please provide your contact information below. Please be assured that your name and personal information will be kept separate from your survey responses and will only be used by the City to contact you regarding future research.

Name: Preferred Phone #: E-mail:

Unweighted:

- 19% Interested and provided contact information
- 81% Did not provide contact information

Survey Format (Unweighted):

- 96% Mail
- 4% Web

Zip Code:

- 30% 92008
- 31% 92009
- 15% 92010
- 24% 92011