



2011



Carlsbad
Resident Survey

Report



Conducted for the City of Carlsbad
December 2011

[bw] RESEARCH PARTNERSHIP





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EXECUTIVE SUMMARY

For the fifth 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 residents. The main research objectives of the 2011 study were to assess residents' perceptions regarding satisfaction with city services, quality of life, sense of community, safety in their neighborhoods, city government, and city-resident communication.

The city-wide survey of residents was administered by telephone (both land line and mobile) from September 13 to October 2, 2011 and averaged 20 minutes in length. A statistically representative sample of 1,000 Carlsbad residents 18 years and older completed a survey, resulting in a maximum margin of error +/- 3.08 percent (at the 95% level of confidence) for questions answered by all 1,000 respondents.

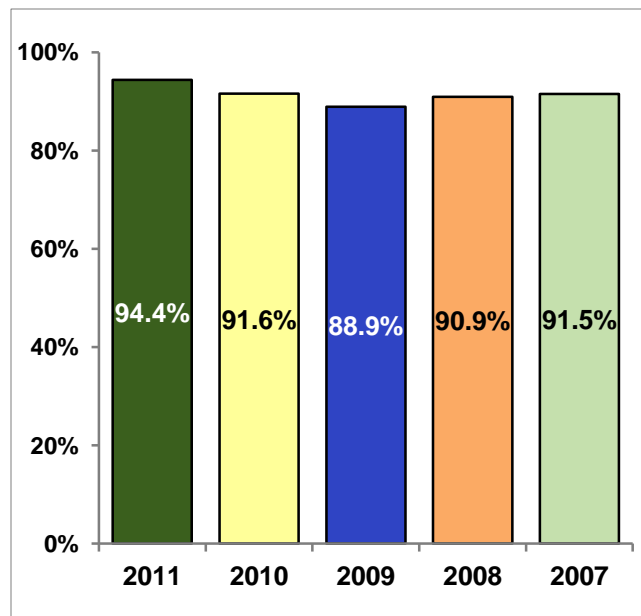
KEY FINDINGS

Satisfaction with City Services

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

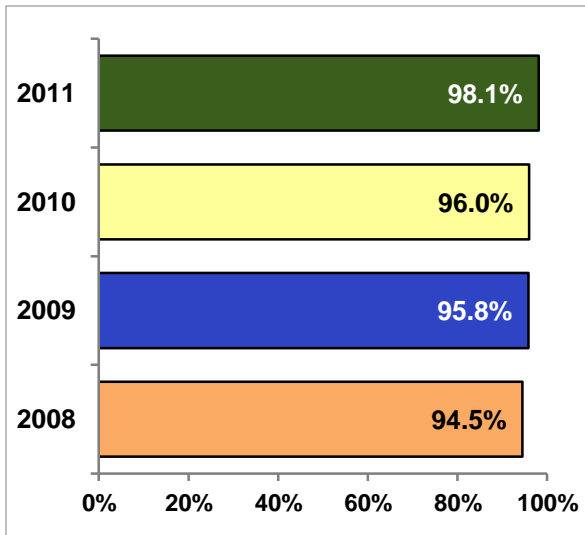
When asked about specific services, residents who provided an opinion reported the most satisfaction with the city's efforts to "Provide library services" (96%), "Maintain city parks" (95%), "Provide fire protection and emergency medical services" (94%), and "Trash collection services" (93%).

Among those who provided an opinion, satisfaction with the city's efforts to "Manage traffic congestion on city streets" (77%) and "Manage residential growth and development" (72%) reached new highs in 2011.



Quality of Life

Also reaching a new high in 2011, 98 percent of residents rated the quality of life in Carlsbad as "Excellent" (64%) or "Good" (34%). Residents were also more positive than previous years regarding the direction of the quality of life. Only 11 percent indicated that the quality of life was "Getting worse," 68 percent viewed it as "Staying about the same," and 17 percent rated it as "Getting better."



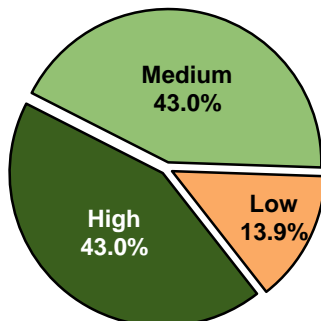
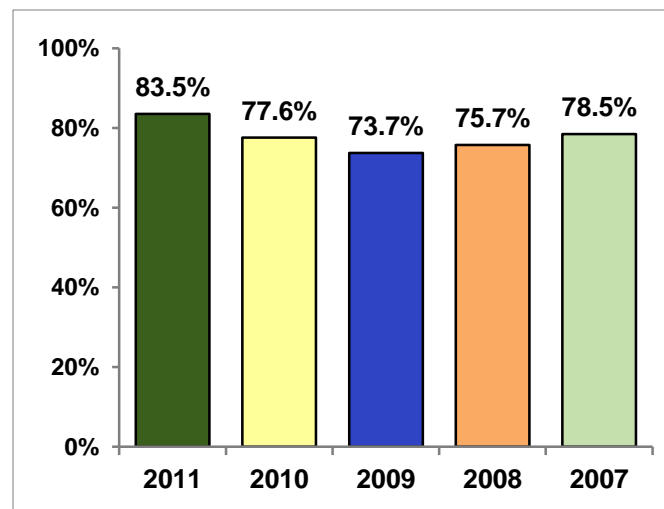
Taken together, the number of residents who rated the quality of life in the city as "Poor" or "Very poor" or felt it was "Getting worse" was lower in 2011 than previous years. As a follow-up question, the 11 percent of residents (114 respondents) who indicated some measure of dissatisfaction with the quality of life were asked to report the number one thing that the city could do to improve quality of life. The most frequently cited response among the sub-group was to stop building and growth (27%), followed by "Fix the traffic problems" (16%) and "Increase/ improve police services" (11%).

Safety

The overall safety percentages reported by residents in 2011 were the highest of any survey year 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 (86% "Very safe") and 90 percent of residents reported feeling safe walking alone in their neighborhoods after dark (54% "Very safe").

Confidence in City Government

Eighty-four percent of residents indicated confidence in Carlsbad city government to make decisions that positively affect the lives of community members. Although composition shifted (i.e., a lower percentage in the "Very confident" category and a higher percentage in the "Somewhat confident" category), the overall confidence level reported by residents in 2011 was higher than any previous survey year.



Sense of Community

Based on a seven-question series, 43 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."



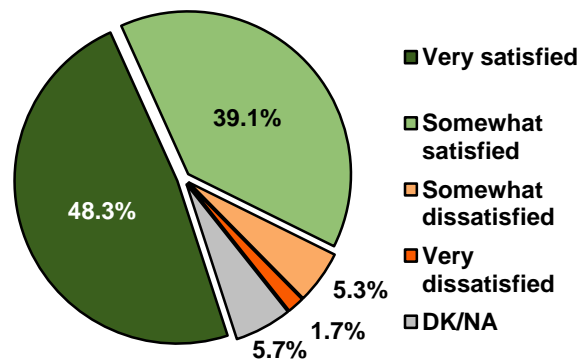
Sense of community was positively correlated with each of the survey's key metrics: satisfaction with the job the city is doing to provide services, quality of life ratings, perceptions regarding the direction of the quality of life, satisfaction with city-resident communication, feeling safe walking alone in their neighborhoods (during the day and after dark), and confidence in city government.

The top predictors of having a high sense of community were satisfaction with the city's efforts to provide recreation programs and positive ratings for Carlsbad's quality of life.

City-Resident Communication and Information Sources

Eighty-seven percent of residents were satisfied (48% "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 television news (77%), the community services and recreation guide (73%), and the city's website (71%).



CONCLUSIONS

Carlsbad Satisfaction High while California Satisfaction Languishes

Earlier this year, California residents gave the state its lowest quality of life rating¹ in almost 20 years. Other regional and national measures of quality of life and resident well being have been equally dismal as the economic downturn and recent government scandals appear to be having a substantial negative impact on resident satisfaction and quality of life ratings. While statewide and national metrics of well being and resident satisfaction have declined, Carlsbad residents have remained remarkably positive about the city and its quality of life. Overall levels of satisfaction with city services have increased over the last two years while reaching historically high levels. Carlsbad residents also remain almost universally positive about the quality of life offered in the city, with 98 percent rating it as either "Excellent" or "Good," also consistently increasing over the last four years.

According to the Pew Research Center, "By almost every conceivable measure, Americans are less positive and more critical of government these days"² and yet Carlsbad residents have bucked statewide and national trends and have shown an increase in their confidence in city government, with more than four out of five respondents "Somewhat confident" or "Very confident" in city government.

¹ According to a joint UC Berkeley and Field Poll completed in February 2011 with 898 registered voters. For more information, go to <http://igs.berkeley.edu/reports/RIs2370.pdf>

² Pew Research Center, April 2010, for more information go to <http://pewresearch.org/pubs/1569/trust-in-government-distrust-discontent-anger-partisan-rancor>



The question becomes, how has Carlsbad been able to maintain - and in many instances increase - resident satisfaction among multiple metrics in an economic environment that has been historically challenging? The results of the survey show that Carlsbad has maintained high levels of satisfaction with many of the City's specific services like library services, fire protection and police services, with several of these services reaching new highs for satisfaction either in 2011 or 2010. However, potentially of greater significance are those specific services that have historically received relatively low satisfaction, managing growth and development as well as managing traffic congestion that have both consistently improved over the last five years, going from as low as 57 percent to over 70 percent total satisfaction for both issues.

Carlsbad Communication Efforts

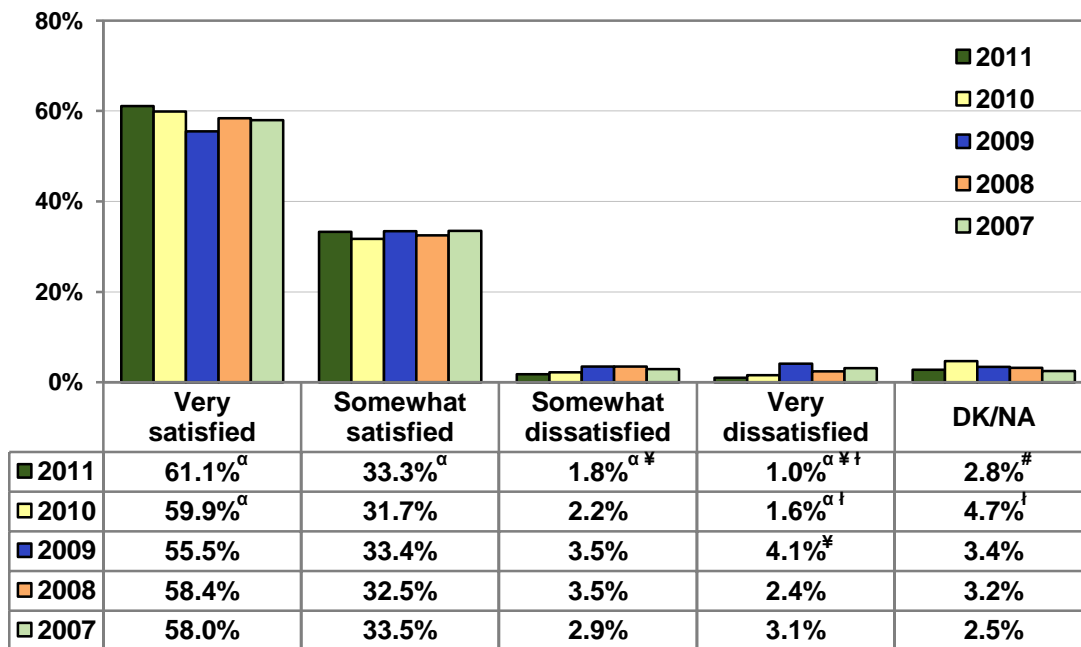
Another potential explanation for Carlsbad's high satisfaction across multiple measures can be traced to residents' overall level of satisfaction towards the city's communication efforts. With close to the majority (48%) "Very satisfied," 87 percent of indicated they were satisfied with the city's communication efforts. In our experience with other community resident surveys, satisfaction with a city's communication efforts is on average ten percentage points below overall satisfaction with city services. In Carlsbad, the differential between overall satisfaction with city services and satisfaction with the city's communication efforts is only seven percentage points. Satisfaction with city-resident communication is yet another example of Carlsbad surpassing norms, resulting in a strong overall resident satisfaction profile.

SATISFACTION WITH CITY SERVICES

Ninety-four percent of residents surveyed in 2011 were satisfied with the job the City of Carlsbad is doing to provide city services, the highest percentage reported in any survey year (2011: 94%, 2010: 92%, 2009: 89%, 2008: 91%, 2007: 92%).

Specifically, 61 percent of residents were "Very satisfied," 33 percent "Somewhat satisfied," three 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 2010 (p<.05)

α Statistically significant change from 2009

* Statistically significant change from 2008

† Statistically significant change from 2007

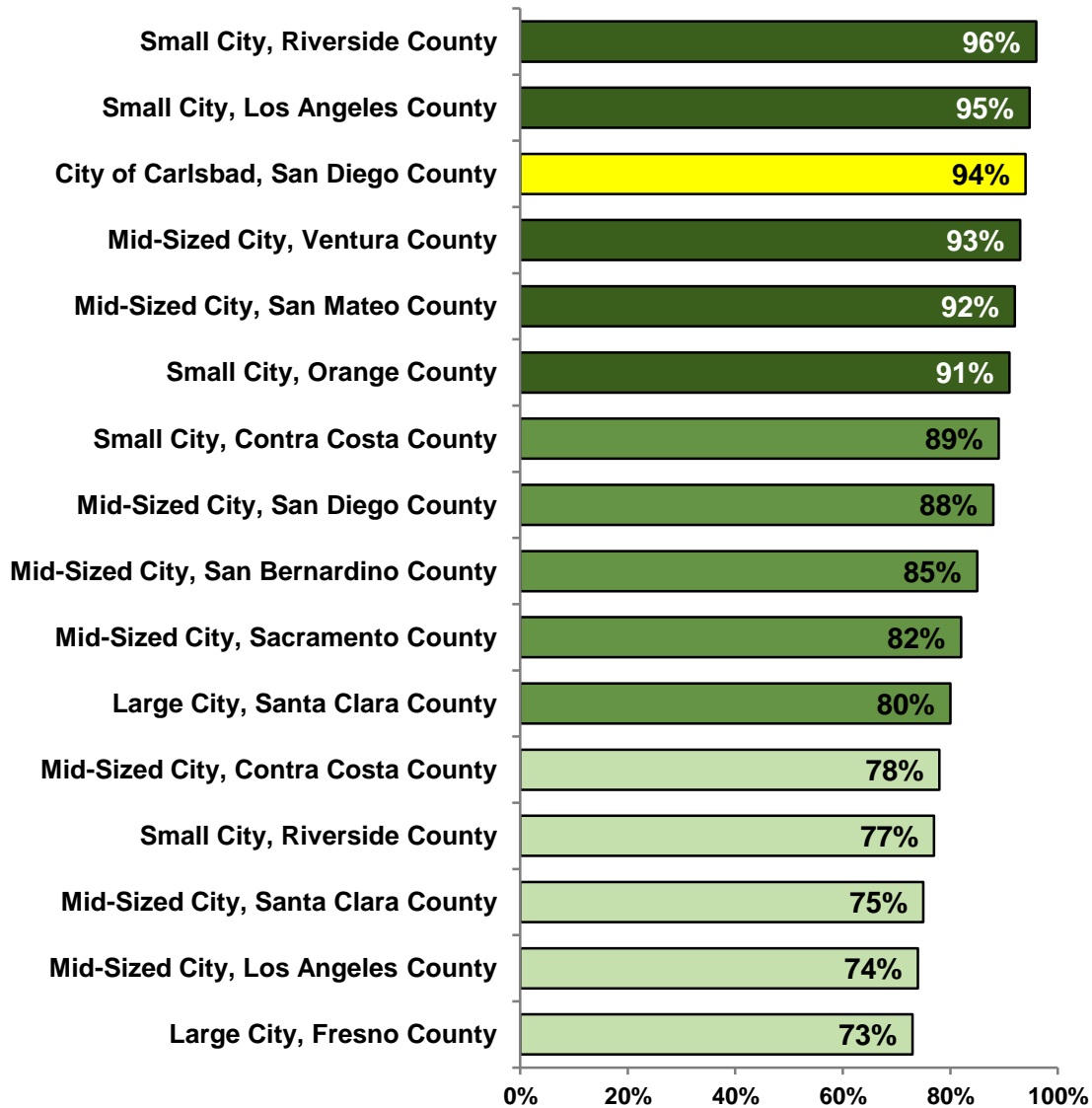
Throughout this report, analyses of responses by resident sub-groups (i.e., crosstabulation data) will be presented in text boxes. The following is an examination of satisfaction with the city's provision of services among sub-groups.

- 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. Residents' 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.
- Consistent with the results of last year's survey, 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):
 - Confidence in Carlsbad government to make decisions that positively affect the lives of residents;
 - Ratings for the quality of life in Carlsbad; and
 - Satisfaction with the city's efforts to repair and maintain local streets and roads.
- Residents that reported having never visited the Village were less satisfied with city services than those who had visited the Village (86% vs. 95%).
- Satisfaction was 90 percent or higher for the vast majority of demographic sub-groups. Although the differences noted below were statistically different, satisfaction was high for each sub-group.
 - Men reported a higher satisfaction level than women (96% vs. 93%).
 - Renters were more satisfied than owners (97% vs. 94%).
 - Residents 18 to 44 years of age reported a higher level of satisfaction than those 45 years and older (97% vs. 93%).
 - No overall differences in satisfaction were found among Carlsbad neighborhoods. However, a higher than average percentage of residents within the South Beach/ Terramar (47% "Somewhat satisfied") and Calavera Hills/ Tamarack Point (42%) areas reported being "Somewhat satisfied" as compared with "Very satisfied."

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 Cities³



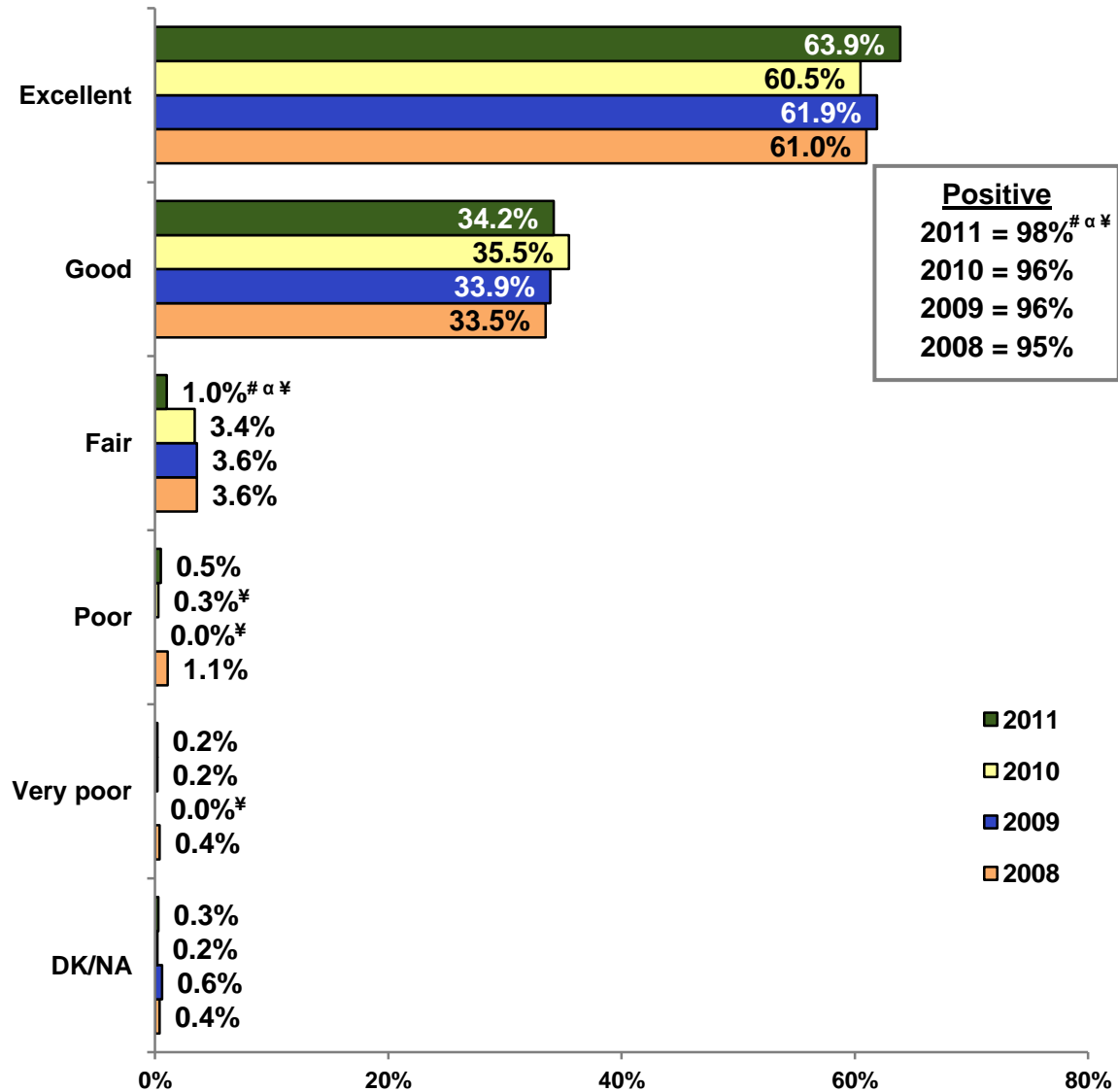
³ Small cities were defined as those with a total population up to 50,000. Mid-sized cities were those with a population between 50,001 and 150,000. Large cities were those with a population of 150,001 or more.

QUALITY OF LIFE

Also reaching a new high in 2011 was residents' quality of life rating.

Ninety-eight percent rated the quality of life in the City of Carlsbad as "Excellent" (64%) or "Good" (34%). Just one percent rated it as "Fair" and less than one percent provided a negative rating.

Figure 3: Quality of Life Rating⁴



[#] Statistically significant change from 2010 (p<.05)

^α Statistically significant change from 2009

[‡] Statistically significant change from 2008

⁴ Question not asked in 2007.

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

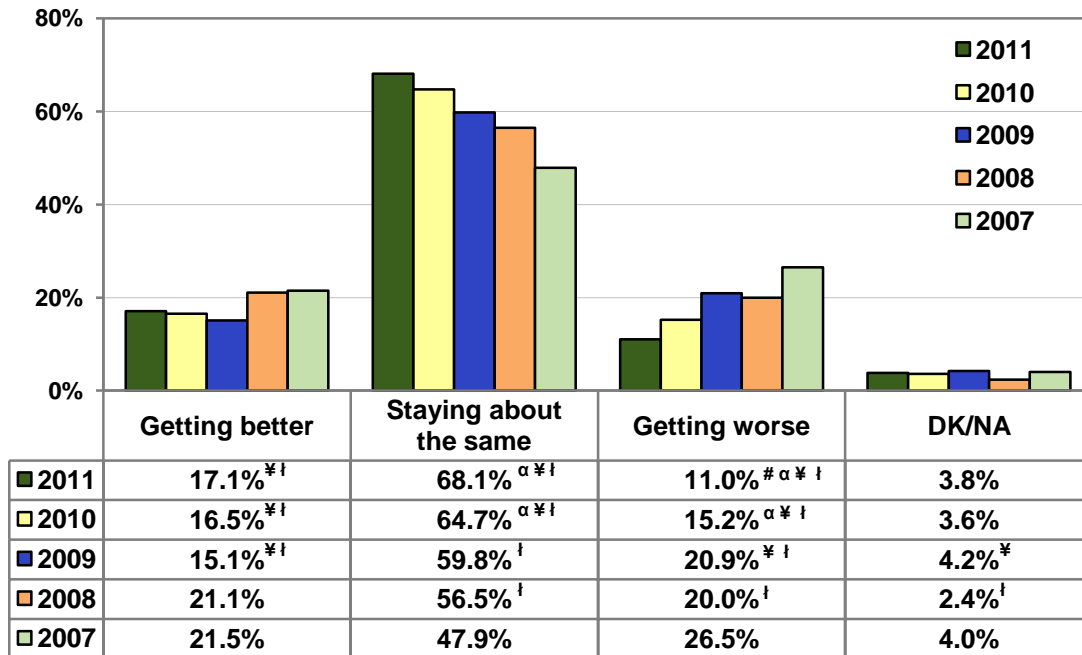
- Quality of life ratings were positively correlated with a number of other variables throughout the survey, including: perceptions regarding the direction of the quality of life, satisfaction with city services, satisfaction with city-resident communication, sense of community, confidence in city government, safety walking alone in their neighborhood both during the day and at night, and experience visiting Carlsbad's Downtown Village.
- A regression analysis revealed the following as the top predictors of residents' quality of life ratings:
 - Satisfaction with the job the city is doing to provide services;
 - Experience visiting Carlsbad's Downtown Village; and
 - Agreement with the sense of community item "If there is a problem in my neighborhood, people who live here can get it solved."
- Given the consistently high overall quality of life ratings among sub-groups, the assessment below focuses on differences in "Excellent" ratings.
 - Seventy-five percent of Carlsbad residents 65 years and older rated the quality of life in the city as "Excellent" compared with 56 percent of those 18 to 24 years of age.
 - Owners were more likely than renters to rate the quality of life in the city as "Excellent" (66% vs. 59%).
 - Sixty-five percent of residents who had visited the Village rated their quality of life as "Excellent" compared with 47 percent of those who had never been to the Village.
 - Residents in zip code 92011 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: 92011: 71%, 92008: 66%, 92009: 62%, 92010: 56%).
 - Residents who identified as living in a Carlsbad neighborhood (64%) or gave the name of their homeowners' association as their neighborhood (74%) were much more likely to rate the quality of life as "Excellent" than those who did not provide either (56%).
 - Although they represent a small sub-set of respondents, a much higher than average percentage of South Beach/ Terramar residents rated the quality of life in Carlsbad as "Excellent" (82% vs. 64%).

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 were more optimistic in 2011 than previous years. Only 11 percent indicated that the quality of life was "Getting worse," 68 percent felt that it was "Staying about the same," and 17 percent rated it as "Getting better."

Figure 4: Quality of Life Direction



Statistically significant change from 2010 (p<.05)

α Statistically significant change from 2009

‡ Statistically significant change from 2008

‡ Statistically significant change from 2007

- Higher than average negative perceptions regarding the direction of the quality of life (11% "Getting worse" across all 2011 respondents) were reported among residents that have lived in Carlsbad for 15 or more years (17%), residents 55 to 64 years of age (17%), those who lived in zip code 92008 (15%), and those in the Olde Carlsbad/ Hedionda Point area (18%).

Approximately 11 percent of respondents (n=114) rated the quality of life in the city as “Poor” or “Very poor” or felt it was "Getting worse." This sub-set of respondents were asked to report the number one thing that the city could do to improve quality of life. The most frequently cited response among this group was to stop building and growth (27%), followed by “Fix the traffic problems” (16%), “Increase/ improve police services” (11%) and "Improve the schools" (6%).

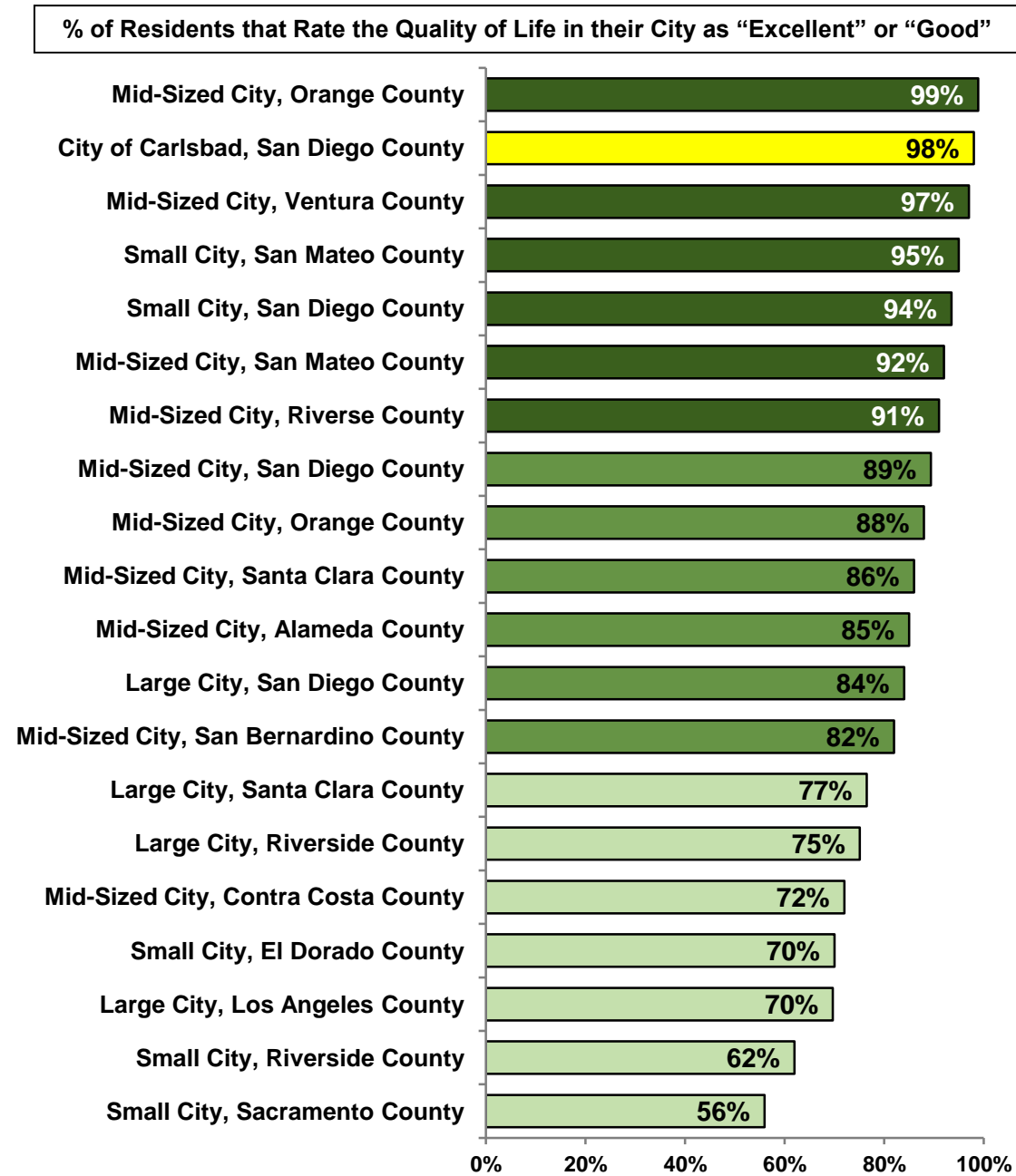
Each year, the leading suggestion for the number one way to improve the quality of life among the sub-group asked the question has been that the city should stop building and growth. Although still in the top position, the percentage citing this response has declined each year (2011: 27%, 2010: 34%, 2009: 37%, 2008: 48%).

The number of residents who rated the quality of life in the city as “Poor” or “Very poor” or felt it was "Getting worse" was lower in 2011 than previous years (2011: 11%, 2010: 15%, 2009: 21%, 2008: 20%).

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 98 percent overall quality of life rating provided by Carlsbad residents is one of the highest reported.

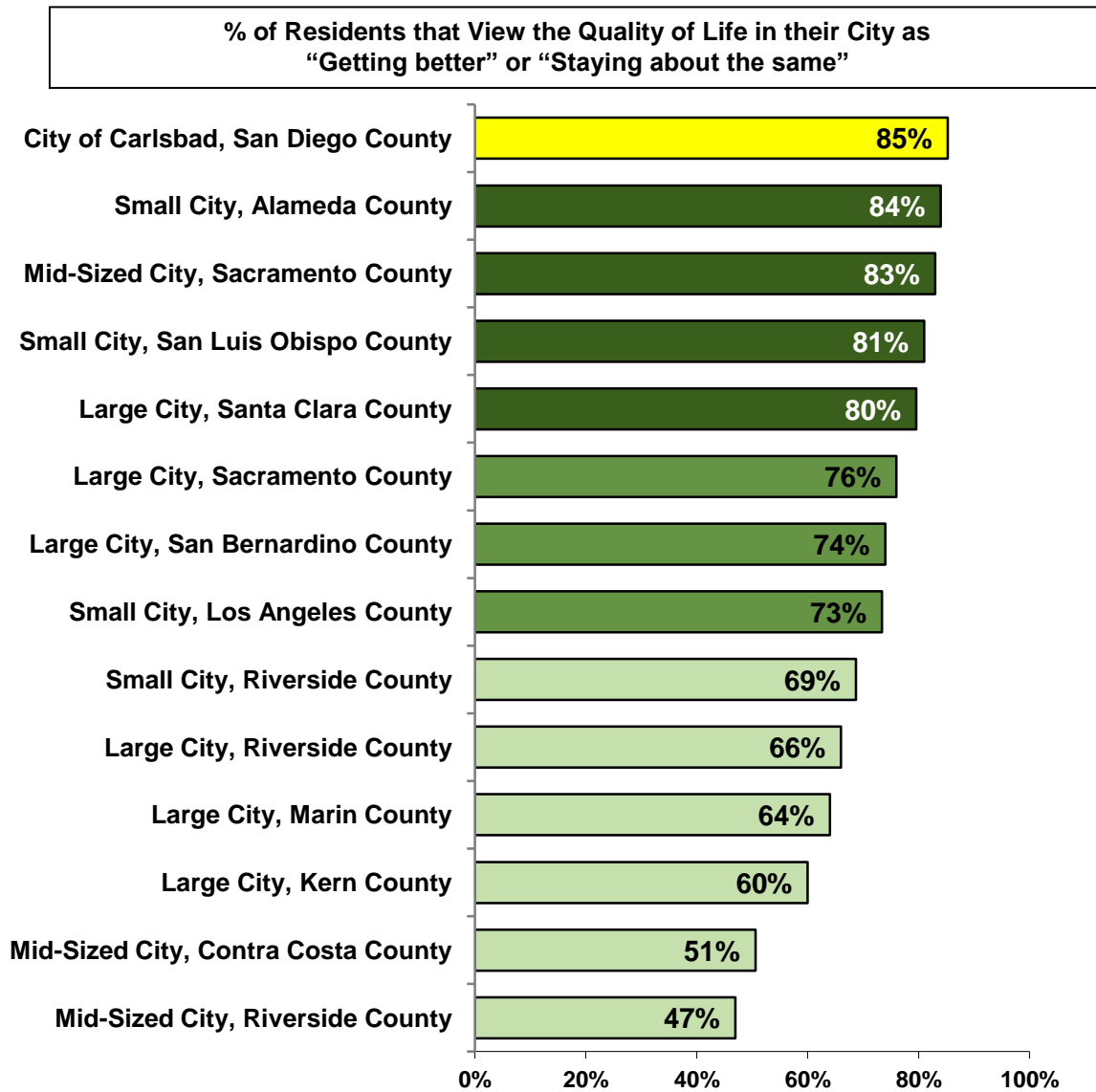
Figure 5: Quality of Life Rating – Comparison to Other Cities⁵



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.

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 6: Quality of Life Direction – Comparison to Other Cities⁶



⁶ 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.

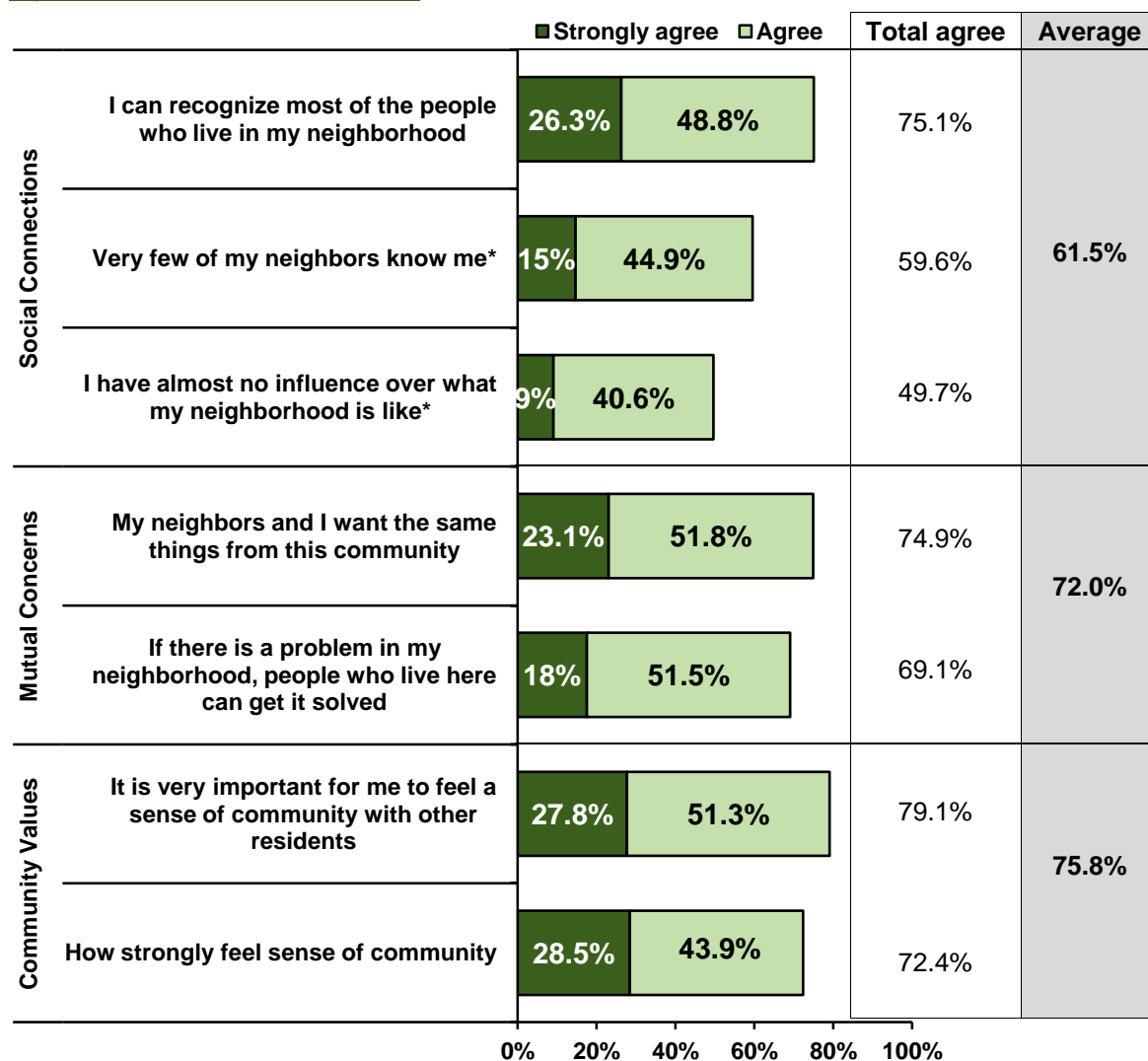


SENSE OF COMMUNITY

To assess sense of community among residents, a seven-question series known as the “Brief Sense of Community Index”⁷ was utilized. The series assesses the three underlying dimensions of sense of community: “Social connections,” “Mutual concerns,” and “Community values.”

Figure 8 displays the questions used to measure sense of community among Carlsbad residents and 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” (72% average).

Figure 7: Sense of Community Index



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

⁷ 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.

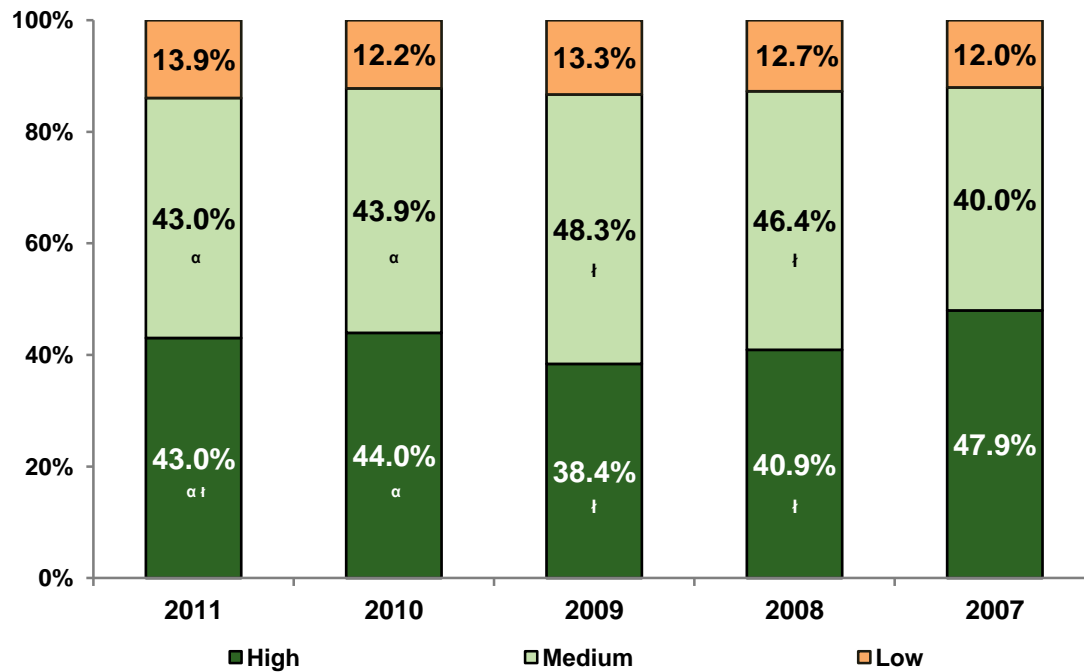


Statistically consistent with last year, 43 percent of residents were classified as having a "High" sense of community in 2011, meaning that they agreed with six of the seven items in the series.

An identical 43 percent placed in the "Medium" sense of community group, having agreed with three, four, or five items in the series.

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

Figure 8: Sense of Community Index Levels



- # Statistically significant change from 2010 ($p < .05$)
- α Statistically significant change from 2009
- ≠ Statistically significant change from 2008
- † Statistically significant change from 2007



The following is an examination of residents' sense of community levels by 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:
 - Satisfaction with the city's efforts to provide recreation programs and
 - Ratings for the quality of life in Carlsbad.
- Residents who had visited the Carlsbad Village were much more likely to be classified as having a "High" sense of community than those who had never visited (44% vs. 28%).
- Compared with those who have lived in the city longer, respondents who had lived in Carlsbad less than one year were the least likely to be classified as having a "High" sense of community (19%) and the most likely to fall into the "Medium" category (68%).
- Residents with children in the home were more likely to be classified as having a "High" sense of community than those without children (47% vs. 40%).
- Fifty-four percent of residents 35 to 54 years of age placed in the "High" sense of community group compared with 39 percent of residents 18 to 34 years of age and 42 percent of residents 55 years and older.
- Residents in zip code 92008 were more likely than those in other zip codes to be classified as having a "Medium" sense of community. Specifically, a majority of the residents in the Village/ North Beach/ Barrio (55%) and Olde Carlsbad/ Hedionda Point (51%) areas fell into the "Medium" category.

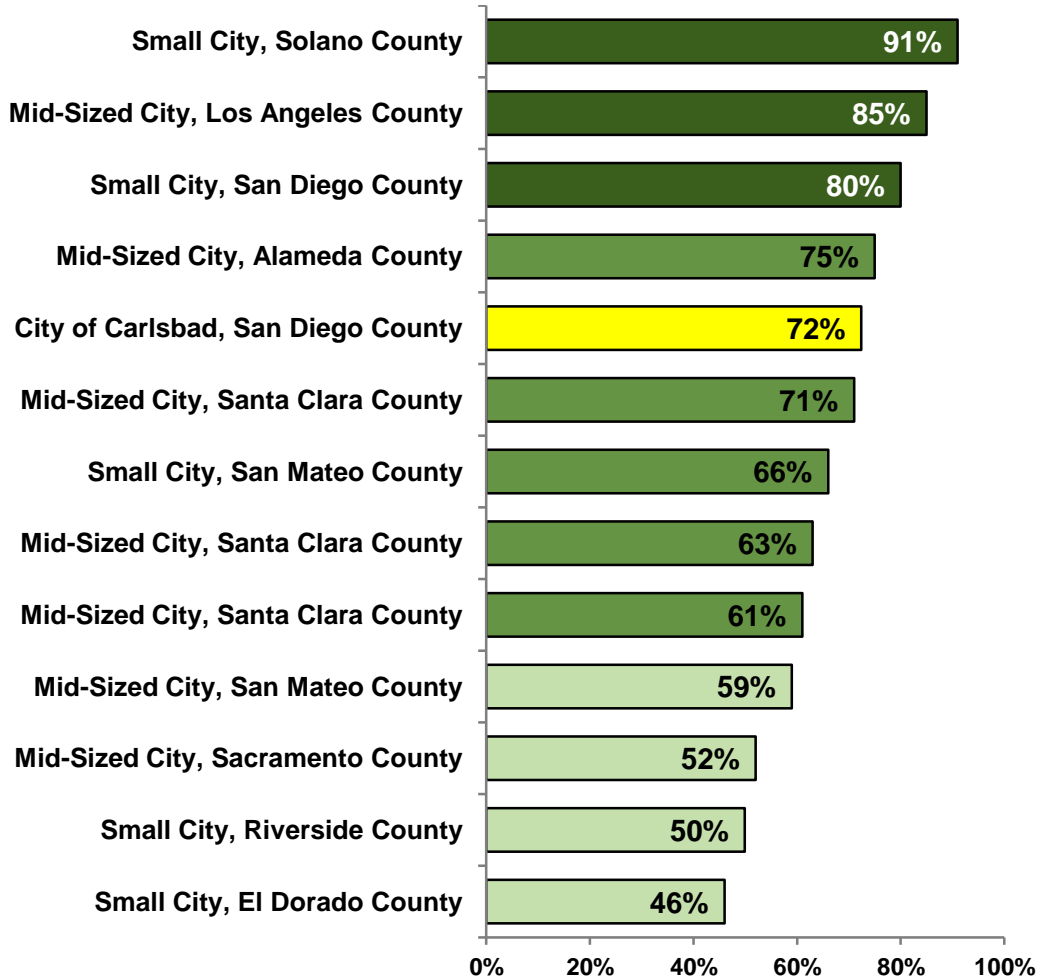


SENSE OF COMMUNITY – COMPARISON TO OTHER CITIES

Figure 10 below displays the percentage of residents in comparable research projects that reported feeling a “Strong” sense of community⁸ living in their city.

Although the percentage was higher in 2011 than 2010 (72% vs. 68%), Carlsbad remained in the middle tier with regard to this metric.

Figure 9: Sense of Community – Comparison to Other Cities⁹



⁸ Question 7 of the survey: “Would you say that you feel a strong sense of community, a weak sense of community, or no sense of community at all?”

⁹ 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.

SAFETY

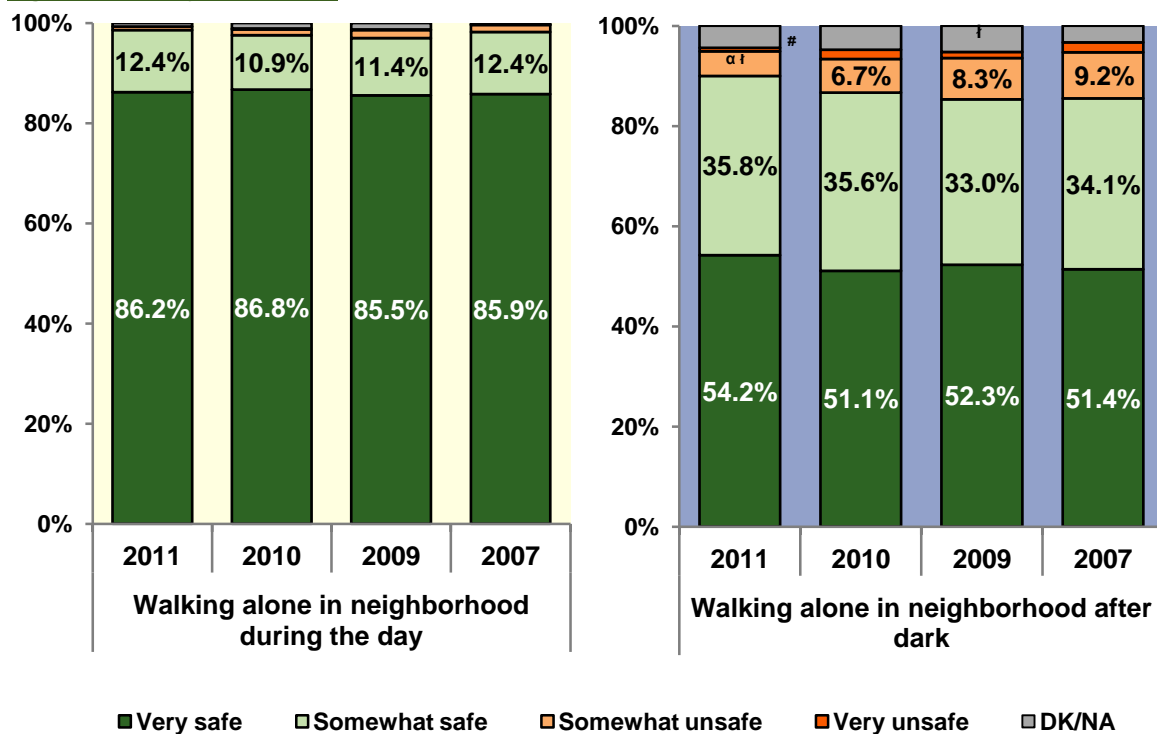
Carlsbad residents reported feeling very safe in their neighborhoods. The overall percentages reported in 2011 were the highest of any survey year for both walking alone during the day and after dark.

An overwhelming 99 percent of residents felt safe walking alone in their neighborhoods during the day (86% “Very safe”) and 90 percent of residents felt safe walking alone after dark (54% “Very safe”). Less than one percent of residents (0.7%) reported feeling unsafe walking alone in their neighborhoods during the day and six percent felt unsafe after dark.

Statistically speaking, the combined safety percentage reported by residents for walking alone in their neighborhoods during the day was higher in 2011 than 2009 (97%) and consistent with 2010 (98%) and 2007 (98%).

The combined safety percentage reported by residents for walking alone in their neighborhoods after dark was statistically higher in 2011 than each of the previous survey years (2011: 90%, 2010: 87%, 2009: 85%, 2007: 86%).

Figure 10: Safety in Carlsbad¹⁰



Statistically significant change from 2010 (p<.05)

α Statistically significant change from 2009

† Statistically significant change from 2007

¹⁰ Question not asked in 2008.



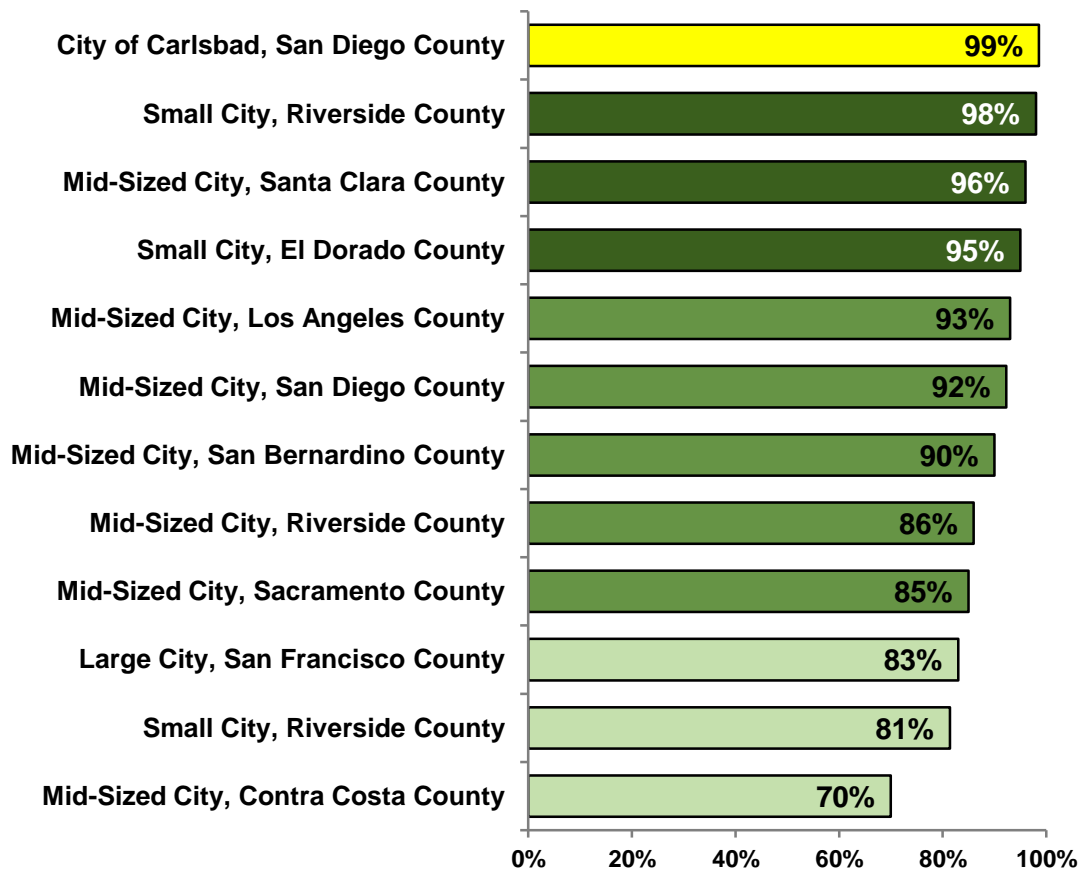
- Safety walking alone in their neighborhoods (during both the day and night) was positively correlated with a number of other metrics within the survey, including: satisfaction with the job the city is doing to provide services, quality of life ratings, perceptions regarding the direction of the quality of life, 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 alone in their neighborhoods after dark (9% vs. 2%). In addition, 70 percent of men reported feeling "Very safe" compared with 40 percent of women.
 - All respondents in the 18 to 24 year group reported feeling safe walking alone in their neighborhoods after dark.
 - A higher than average percentage of residents who had never visited the Village reported feeling unsafe (13% vs. 5%).
 - There were no overall differences in safety by zip code or Carlsbad neighborhood.



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.

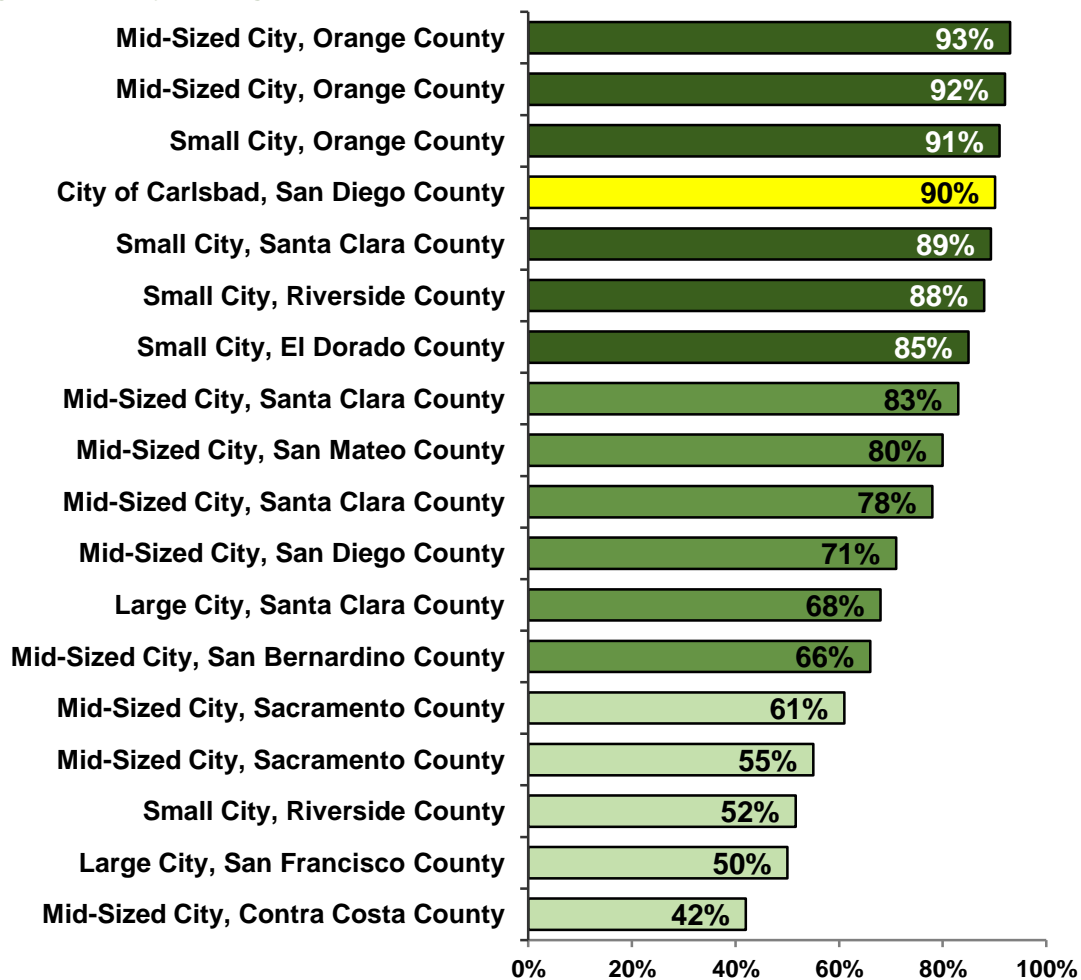
Figure 11: Safety Walking Alone During the Day – Comparison to Other Cities





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



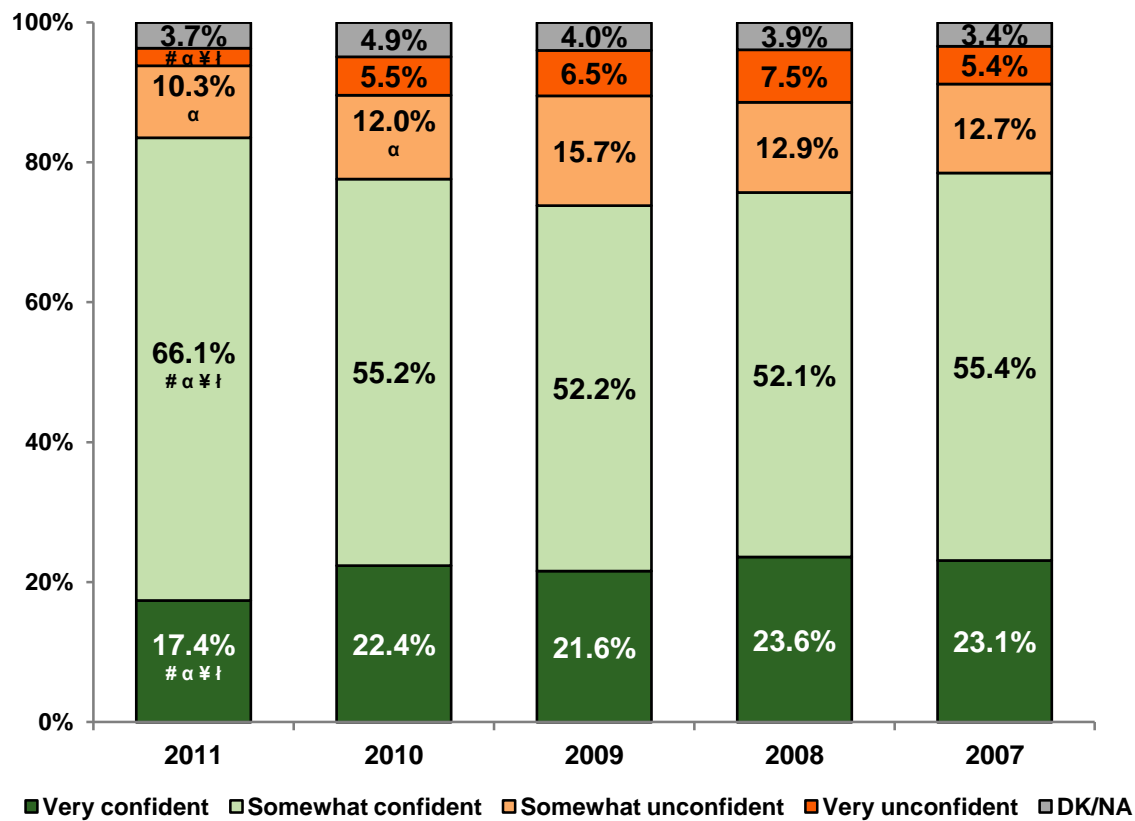


CONFIDENCE IN CITY GOVERNMENT

Eighty-four percent of residents reported confidence in Carlsbad city government to make decisions that positively affect the lives of community members, 13 percent lacked confidence, and four percent did not know or declined to state.

Although there was a shift in the composition of confidence (i.e., a lower percentage in the "Very confident" category and a higher percentage in the "Somewhat confident" category), the overall confidence percentage reported by residents in 2011 was statistically higher than each previous survey year (2011: 84%, 2010: 78%, 2009: 74%, 2008: 76%, 2007: 79%).

Figure 13: Confidence in City Government to Make Decisions



Statistically significant change from 2010 (p<.05)

α Statistically significant change from 2009

‡ Statistically significant change from 2008

† Statistically significant change from 2007



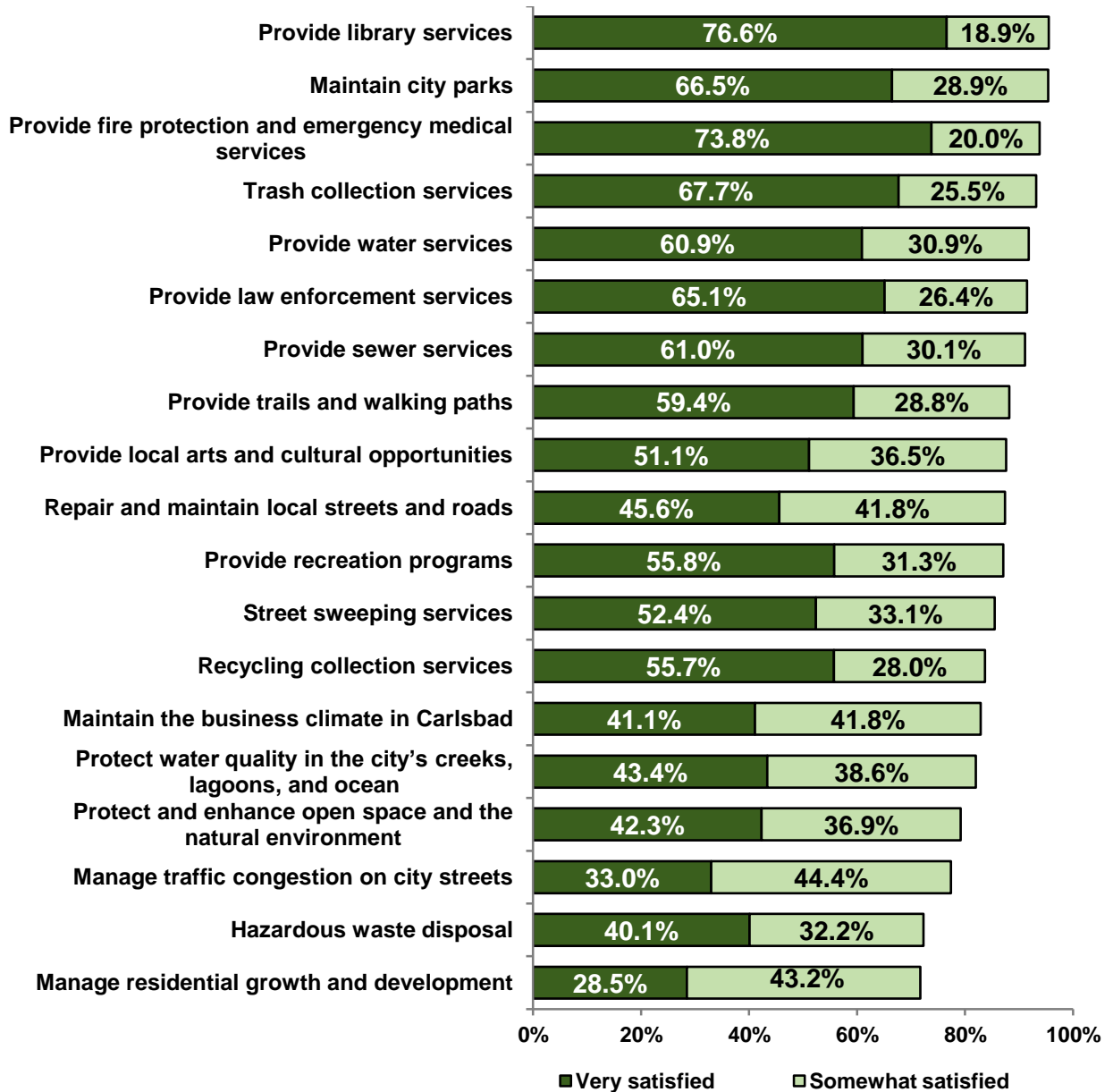
The following is an assessment of confidence in city government by sub-groups.

- 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 city 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 (76% vs. 86%).
- Compared to those in other age groups, a higher percentage of resident 45 to 64 years of age reported being unconfident (17%).
- Although there were no differences in overall confidence by zip code or neighborhood, residents in zip code 92008 (23%) and those in the areas of Village/ North Beach/ Barrio (28%) and Kelly Ranch and surrounding communities (25%) were the most likely to report being "Very confident" in city government.

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" (96%), "Maintain city parks" (95%), "Provide fire protection and emergency medical services" (94%), "Trash collection services" (93%), "Provide water services" (92%), "Provide law enforcement services" (92%), and "Provide sewer services" (91%).

Figure 14: Satisfaction with Specific Services¹¹



¹¹ Due 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 percentage is 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.

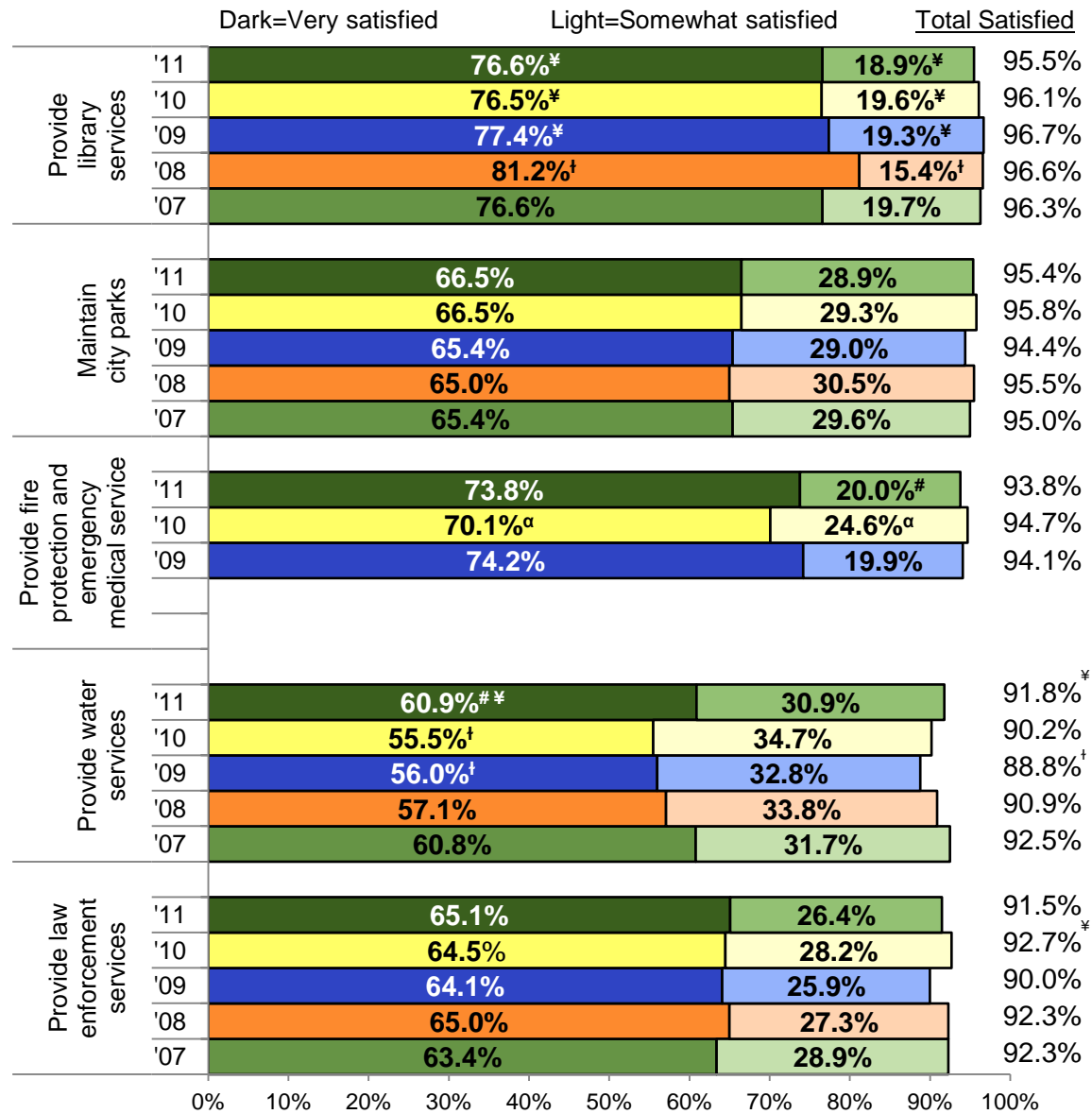
Table 1: Satisfaction with Specific Services

Satisfaction with the city's efforts to...	Satisfaction	Neither	Dissatisfaction	Satisfaction Rank
Provide library services	95.5%	3.3%	1.2%	1
Maintain city parks	95.4%	2.5%	2.1%	2
Provide fire protection and emergency medical services	93.8%	4.7%	1.5%	3
Trash collection services	93.2%	2.5%	4.3%	4
Provide water services	91.8%	3.6%	4.6%	5
Provide law enforcement services	91.5%	2.7%	5.8%	6
Provide sewer services	91.1%	6.7%	2.2%	7
Provide trails and walking paths	88.2%	5.5%	6.3%	8
Provide local arts and cultural opportunities	87.6%	7.3%	5.1%	9
Repair and maintain local streets and roads	87.4%	3.0%	9.6%	10
Provide recreation programs	87.1%	8.8%	4.1%	11
Street sweeping services	85.5%	8.5%	6.0%	12
Recycling collection services	83.7%	3.9%	12.5%	13
Maintain the business climate in Carlsbad	82.9%	9.6%	7.5%	14
Protect water quality in the city's creeks, lagoons, and ocean	82.0%	9.5%	8.6%	15
Protect and enhance open space and the natural environment	79.2%	7.4%	13.5%	16
Manage traffic congestion on city streets	77.4%	6.2%	16.4%	17
Hazardous waste disposal	72.3%	15.8%	11.9%	18
Manage residential growth and development	71.7%	10.3%	18.0%	19
Average across items	86.3%	6.3%	7.4%	

The three charts to follow display satisfaction with the city's efforts to provide each service over the past five years.¹² There were only a handful of statistically significant changes in overall satisfaction over time (changes are marked and described in the text).

Among those who provided an opinion, resident satisfaction with the city's efforts to "Provide water services" was up from 2009, with satisfaction consistent with the levels reported in other years (2011: 92%, 2010: 90%, 2009: 89%, 2008: 91%, 2007: 93%).

Figure 15: Satisfaction with Specific Services by Year: Part 1

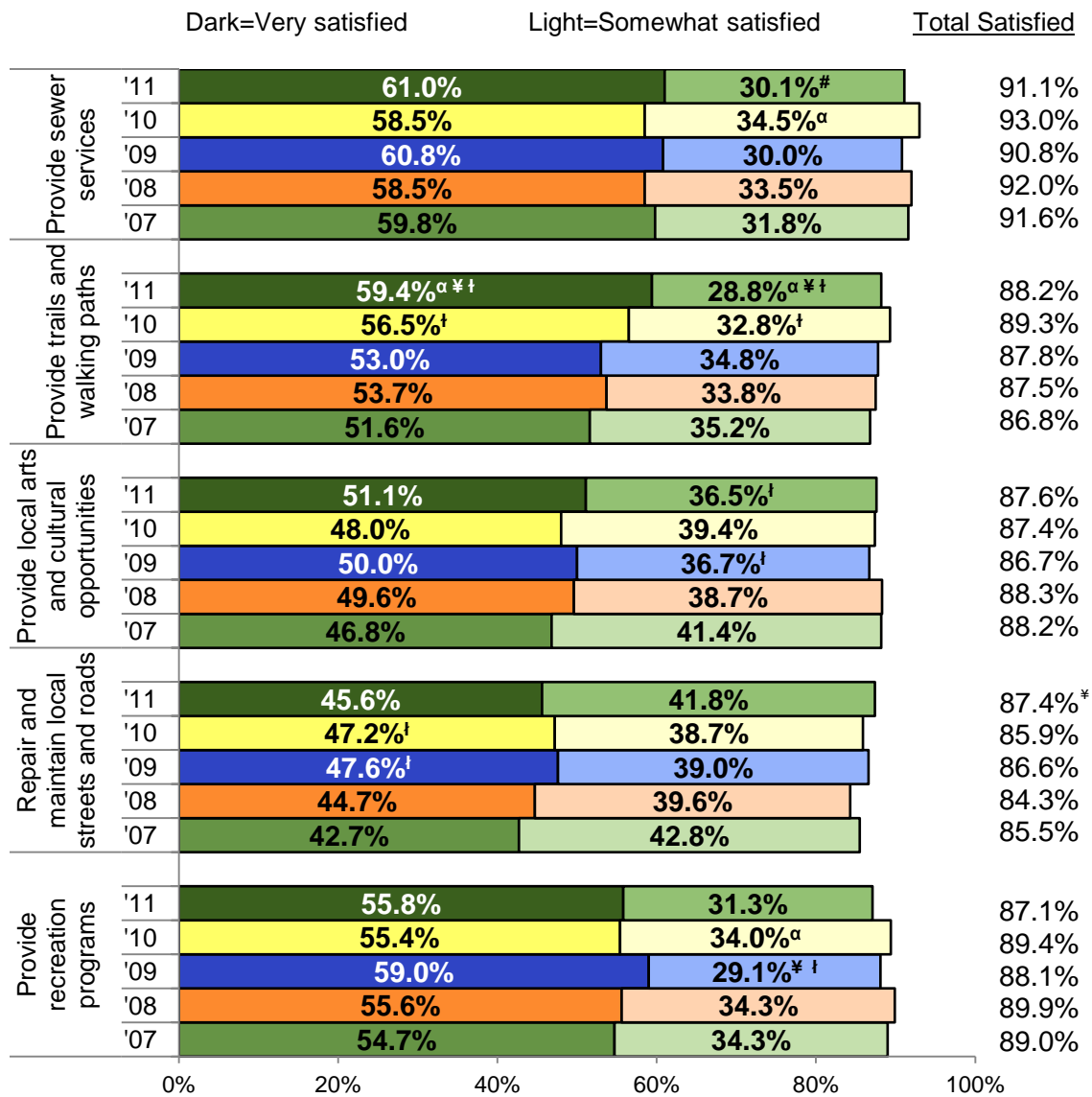


Statistically significant change from 2010 (p<.05)
 α Statistically significant change from 2009
 ‡ Statistically significant change from 2008
 † Statistically significant change from 2007

¹² Only those services with data in 2011 and at least one other year are displayed in the charts.

Among those who provided an opinion, resident satisfaction with the city's efforts to "Repair and maintain local streets and roads" was up from 2008, with satisfaction consistent with the levels reported in other years (2011: 87%, 2010: 86%, 2009: 87%, 2008: 84%, 2007: 86%).

Figure 16: Satisfaction with Specific Services by Year: Part 2

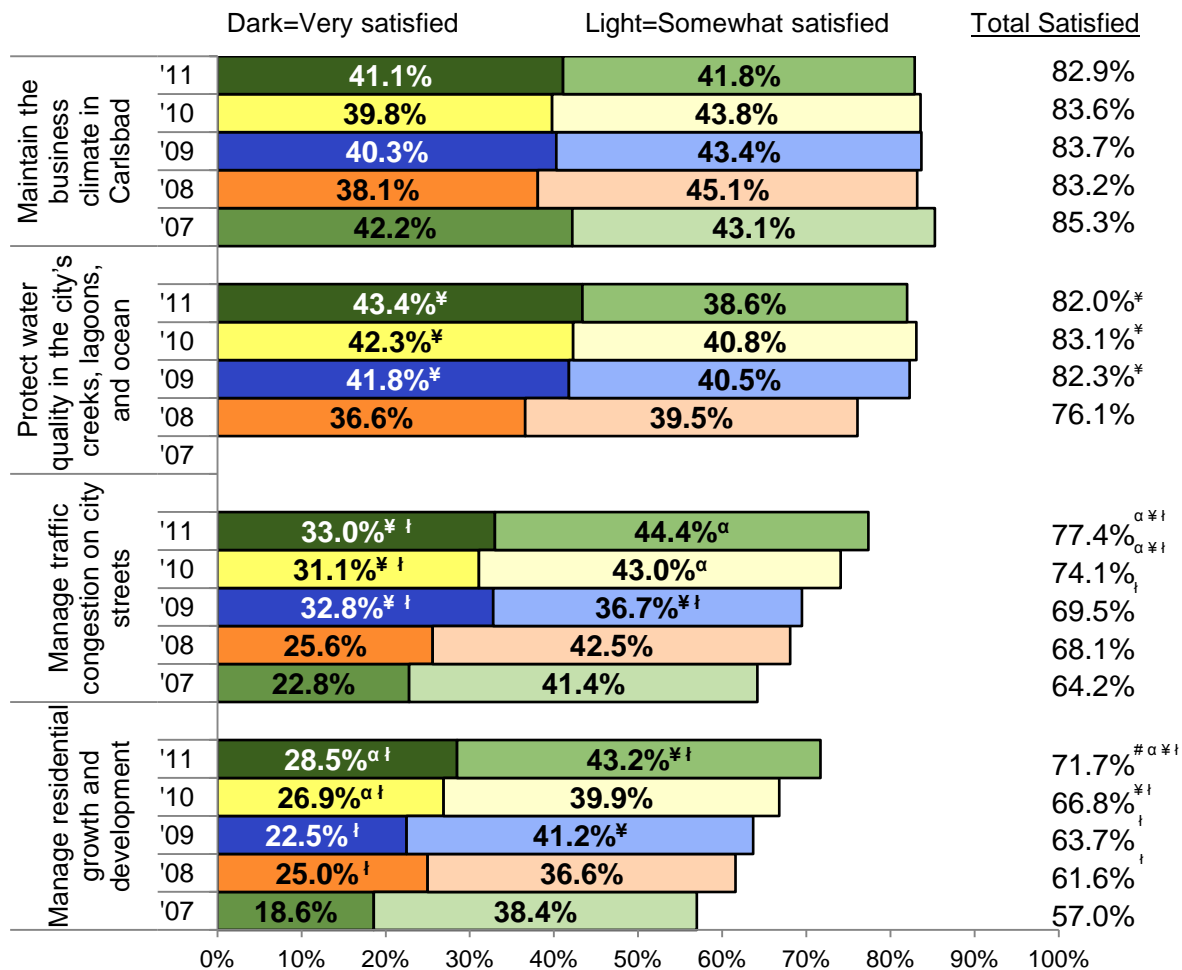


[#] Statistically significant change from 2010 (p<.05)
^α Statistically significant change from 2009
[‡] Statistically significant change from 2008
[†] Statistically significant change from 2007

Consistent with 2009 and 2010, 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 (2011: 82%, 2010: 83%, 2009: 82%, 2008: 76%).

Among those who provided an opinion, residents' satisfaction with the city's efforts to "Manage traffic congestion on city streets" (2011: 77%, 2010: 74%, 2009: 70%, 2008: 68%, 2007: 64%) and "Manage residential growth and development" (2011: 72%, 2010: 67%, 2009: 64%, 2008: 62%, 2007: 57%) each continued its upward trend to reach new highs in 2011.

Figure 17: Satisfaction with Specific Services by Year: Part 3

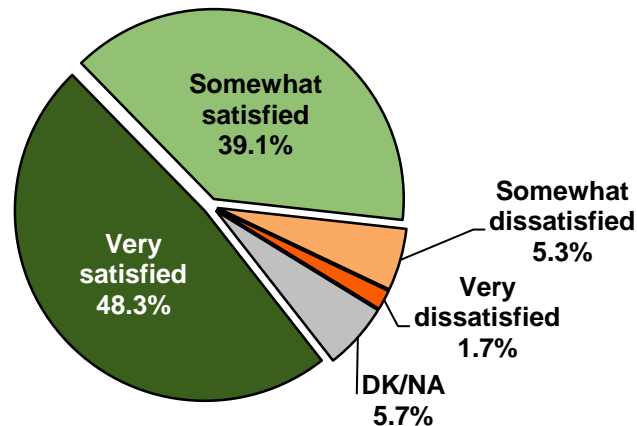


Statistically significant change from 2010 (p<.05)
 α Statistically significant change from 2009
 ‡ Statistically significant change from 2008
 † Statistically significant change from 2007

SATISFACTION WITH CITY-RESIDENT COMMUNICATION

With close to the majority (48%) "Very satisfied," 87 percent of residents reported satisfaction with the city's efforts to provide information to residents through its website, newsletters, water bill inserts, and related sources of information.

Figure 18: Satisfaction with City-Resident Communication¹³



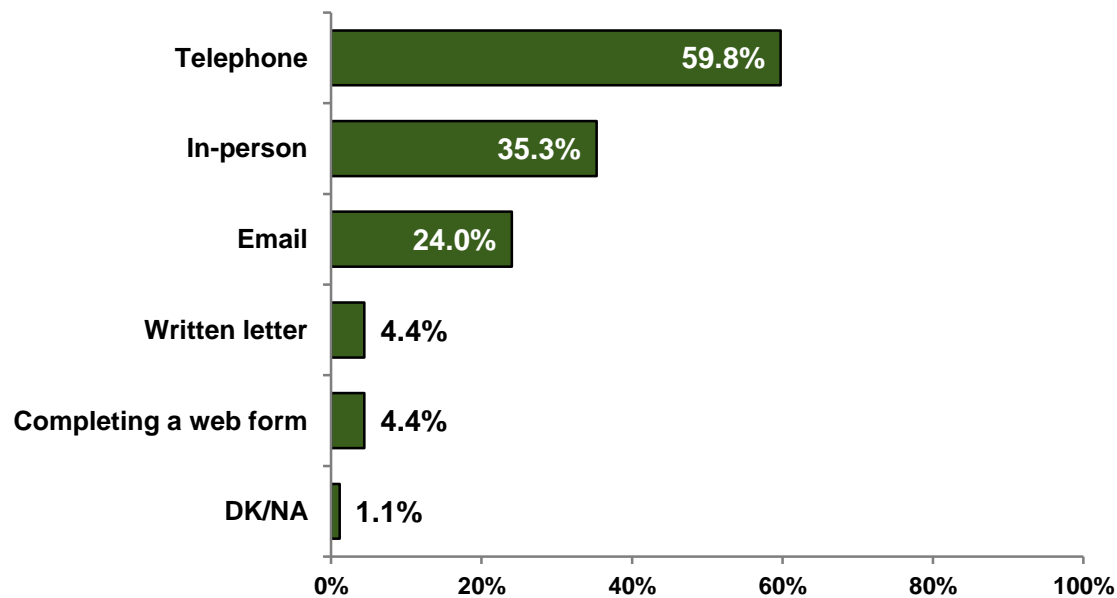
- Satisfaction with city-resident communication was positively correlated with a number of other metrics throughout the survey, including: residents' views on quality of life, perceptions regarding the direction of the quality of life, satisfaction with the job the city is doing to provide services, 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, and water bill flyers for information about city issues, programs, and services reported much higher satisfaction levels than those who never utilized those sources.
- Residents living in apartments reported higher than average dissatisfaction with city-resident communication (12% vs. 7%).
- Hispanic/ Latino respondents reported more dissatisfaction than residents in other ethnic groups (16%).
- Examining differences by zip code, 92010 residents were the least likely to report dissatisfaction (92010: 2%, 92009: 7%, 92008: 8%, 92011: 8%).
- By neighborhood, a lower than average percentage of residents in Kelly Ranch/ surrounding communities (0%) and Calavera Hills/ Tamarack Point (2%) reported dissatisfaction.

¹³ Wording of this question changed slightly in 2011. As such, previous years' data are not displayed.

RECENT COMMUNICATION WITH THE CITY OF CARLSBAD

Twenty-one percent of residents have communicated with City of Carlsbad staff on issues related to city business over the past 12 months. Within that group, telephone was the most utilized method of contact (60%), followed by in-person (35%) and email communications (24%).

Figure 19: Method of Communication with City Staff (n=212)¹⁴



- Residents 45 years and older (27%) and those who lived in Carlsbad for ten years or longer (25%) were much more likely than those 18 to 44 years and those who have been in the city less than ten years to have communicated with Carlsbad city staff on issues related to city business.
- By neighborhood, a higher than average percentage of residents in Olde Carlsbad/ Hediona Point reported communicating with the city on issues related to city business (31% vs. 21%).

¹⁴ Multiple responses permitted; the percentages in the figure total more than 100 percent.

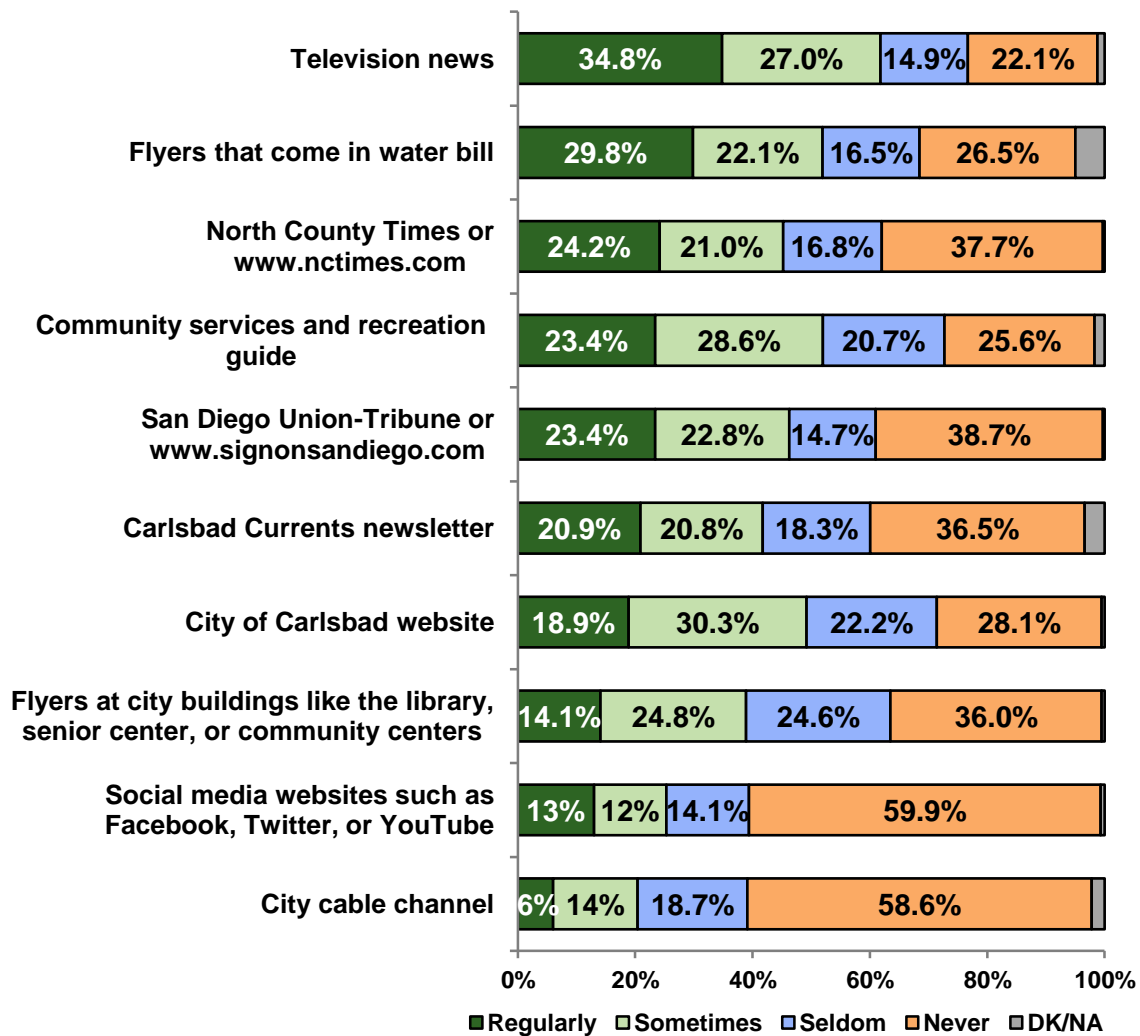
INFORMATION SOURCES

The most "Regularly" utilized sources of information about city issues, programs, and services among residents were television news (35%) and flyers that come in the water bill (the "Carlsbad Currents" newsletter) (30%).

In terms of overall use of each source for information on city issues, programs, and services, television news (77%), the community services and recreation guide (73%), and the city's website (71%) were each utilized by more than seven out of ten residents.

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

Figure 20: Frequency of Using Information Sources¹⁵



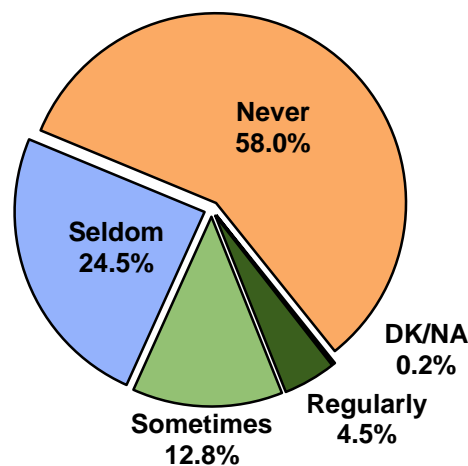
¹⁵ Figure sorted by the percentage that "Regularly" use each source.

TELEVISION SERVICE AND THE CITY

Consistent with 2009, the majority (57%) of Carlsbad residents in 2011 subscribed to Time Warner television service. At 22 percent, the second most popular television service was AT&T U-Verse (up from 17% in 2009).

When residents who subscribed to Time Warner or AT&T U-Verse were asked how often they, or members of their household, watched the city's cable channel that broadcasts city council meetings and other programming specific to the City of Carlsbad, 42 percent indicated they watched the channel. Five percent "Regularly" watched, 13 percent "Sometimes," and 25 percent "Seldom" watched the city's cable channel.

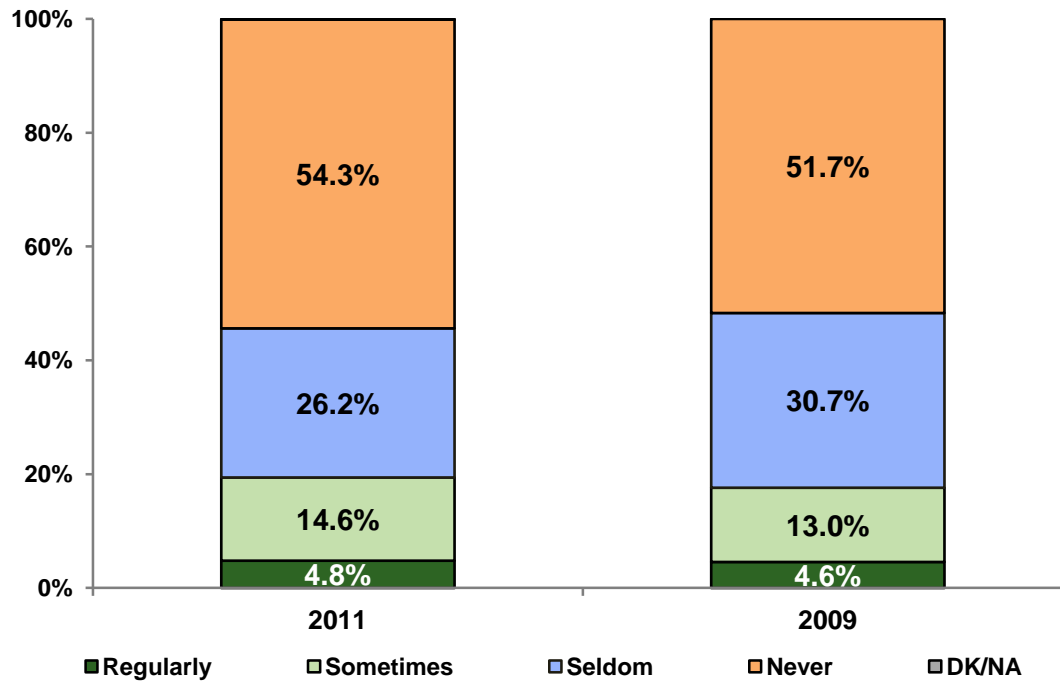
Figure 21: City's Cable Channel Viewership



- The longer someone lived in Carlsbad, the more likely they were to have watched the city cable channel. Fifty-one percent of respondents who have lived in the city 15 years or more have watched the channel compared with 13 percent among those in the city for less than one year.
- Viewership was positively correlated to sense of community. Forty-two percent of residents classified as having a "High" sense of community had watched, 35 percent of the "Medium" group, and 27 percent of those in the "Low" sense of community group had watched the channel.
- Compared to those in other zip codes, viewership was highest among residents of zip code 92008 (46%).
- By neighborhood, a higher than average percentage of residents of Kelly Ranch and surrounding communities (54%) and Olde Carlsbad/ Hediona Point (49%) reported watching the city cable channel, whereas a lower than average percentage of Rancho Carrillo/ Bressi Ranch/ La Costa Greens (20%) residents watched.

For an apples to apples comparison with the viewership data collected in 2009, the data presented below were filtered for residents with Time Warner as their cable provider. There were no statistically significant changes in viewership from 2009 to 2011 among residents with Time Warner.

Figure 22: City's Cable Channel Viewership by Year¹⁶

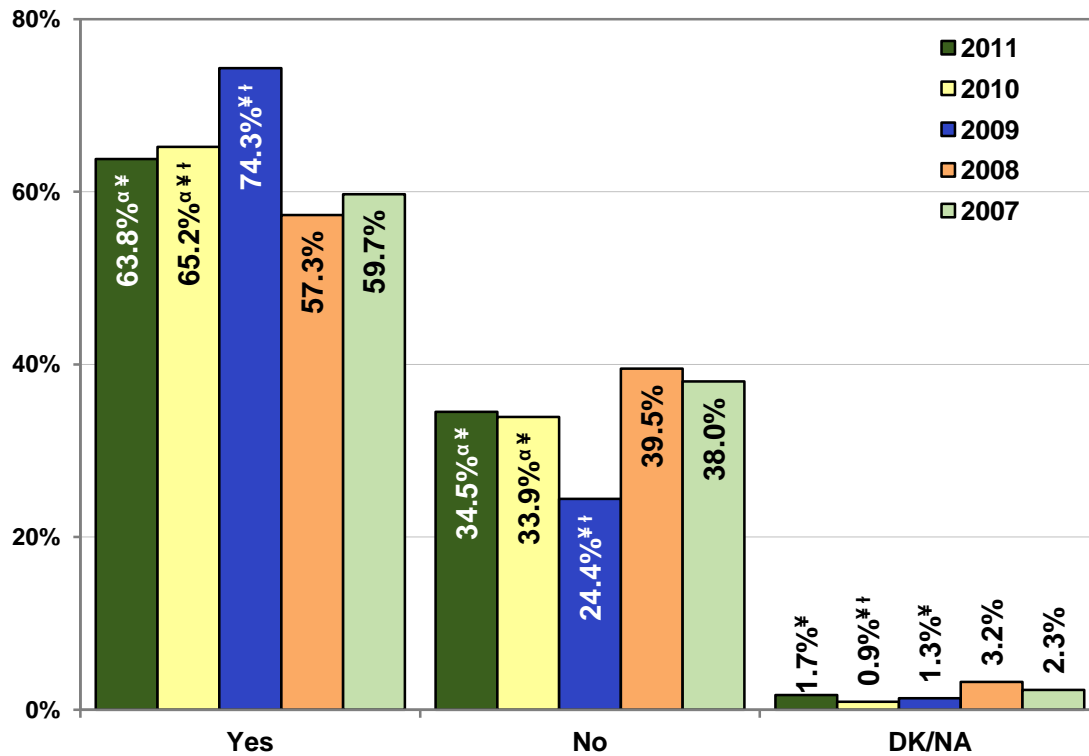


¹⁶ The 2009 question was only asked to residents with Time Warner as their cable provider, whereas the 2011 question was asked to all respondents regardless of their cable provider. For the purposes of comparing the two years, 2011 data presented in Figure 23 were filtered to only include those who subscribed to Time Warner.

PREVENTING POLLUTION OF CREEKS, LAGOONS, AND OCEAN

Consistent with the results from last year, 64 percent of residents have seen or heard information in the past year about how residents can prevent the pollution of local creeks, lagoons, and the ocean.

Figure 23: Informed about Preventing Water Pollution



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

α Statistically significant change from 2009

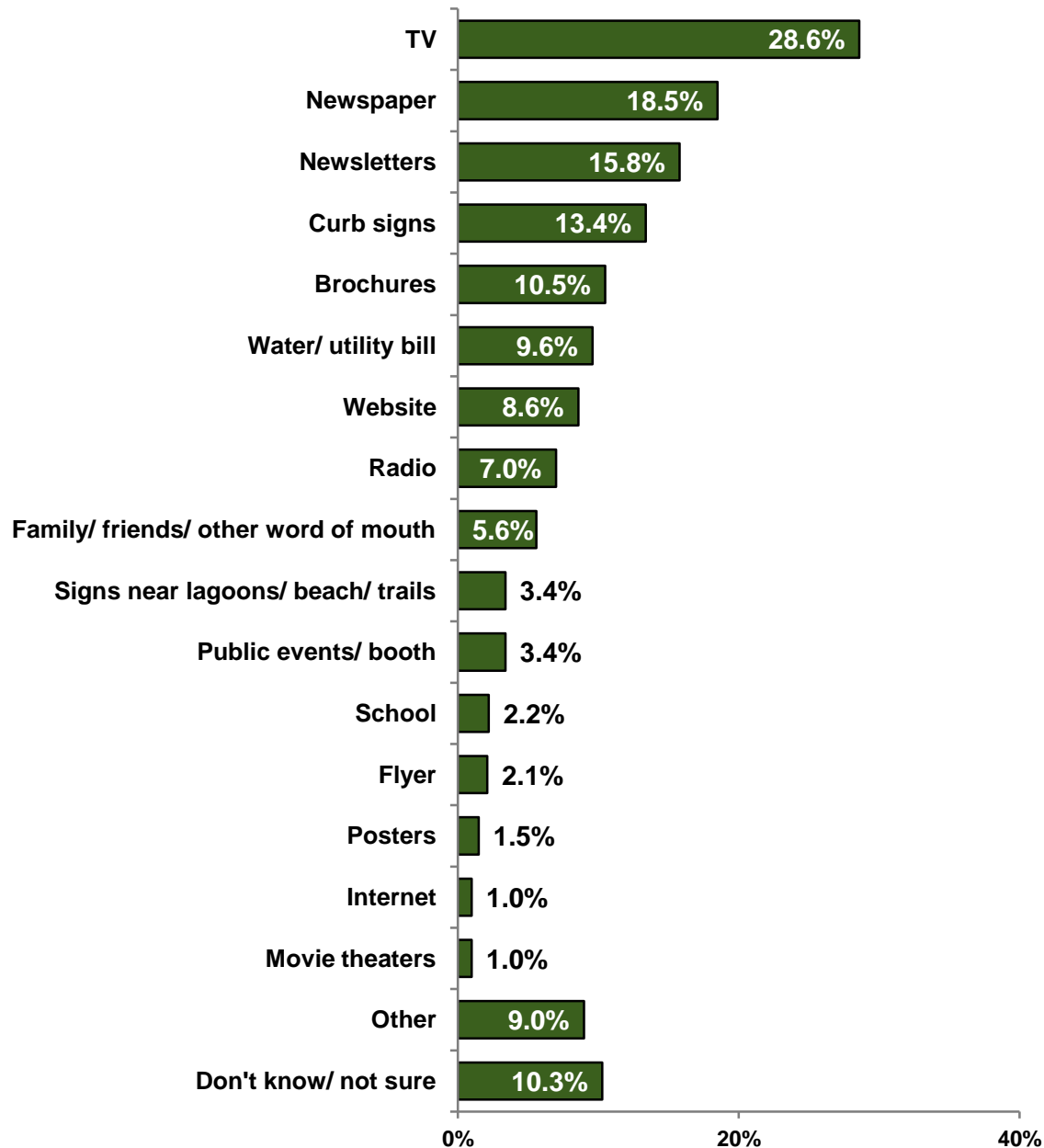
‡ Statistically significant change from 2008

† Statistically significant change from 2007

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 of information were television (29%), newspapers (19%), and newsletters (16%).

Figure 24: Source of Pollution Prevention Information (n=638)¹⁷



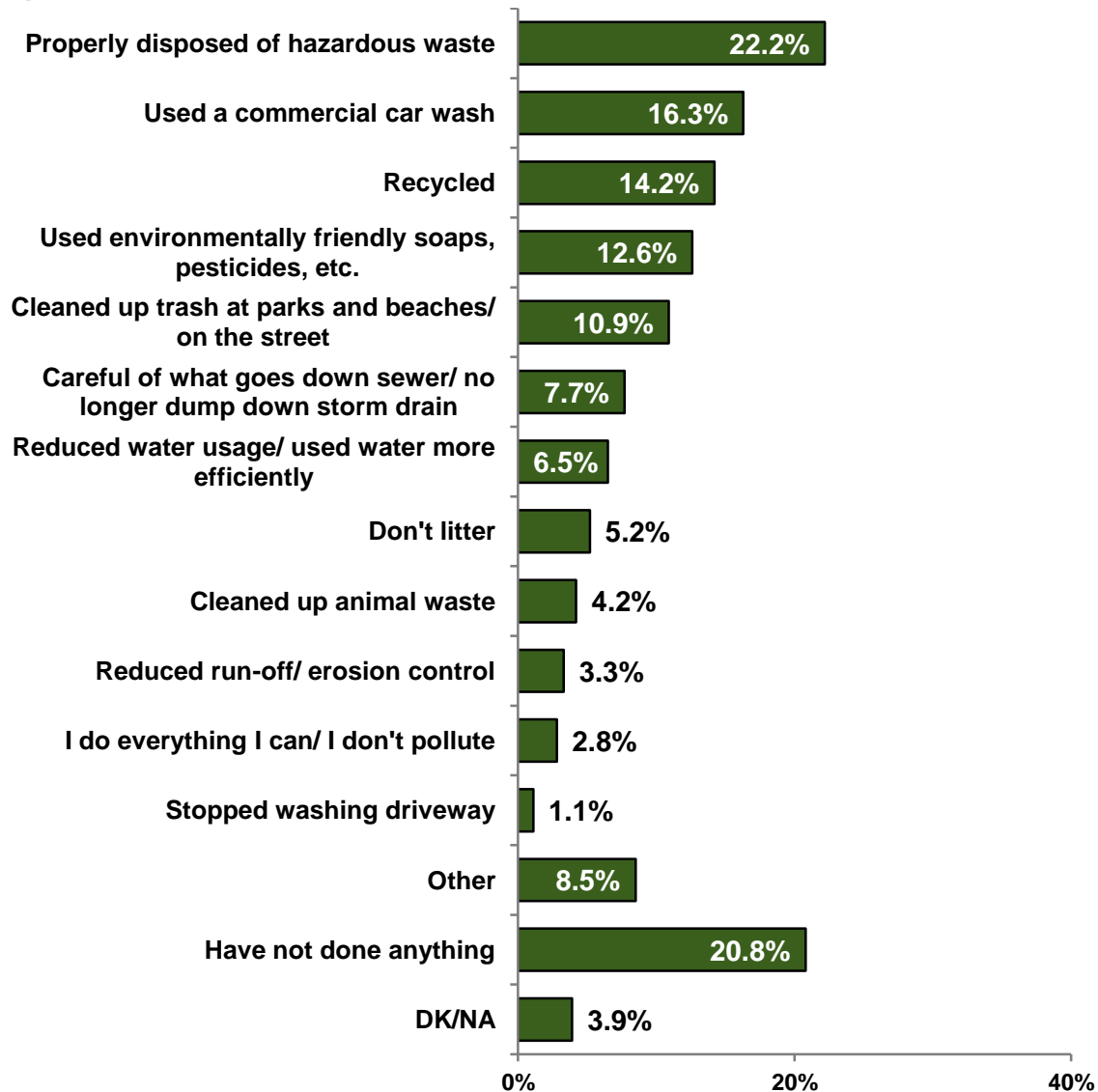
¹⁷ Multiple responses permitted; the percentages in the figure total more than 100 percent. For this figure, categories with less than one percent were combined into "Other." Please see Appendix B: Survey Toplines for a complete breakdown of responses.

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 last year, one in four 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, 16 percent used a commercial car wash, and 14 percent recycled.

Figure 25: Action Taken Based on Pollution Prevention Information (n=638)¹⁸



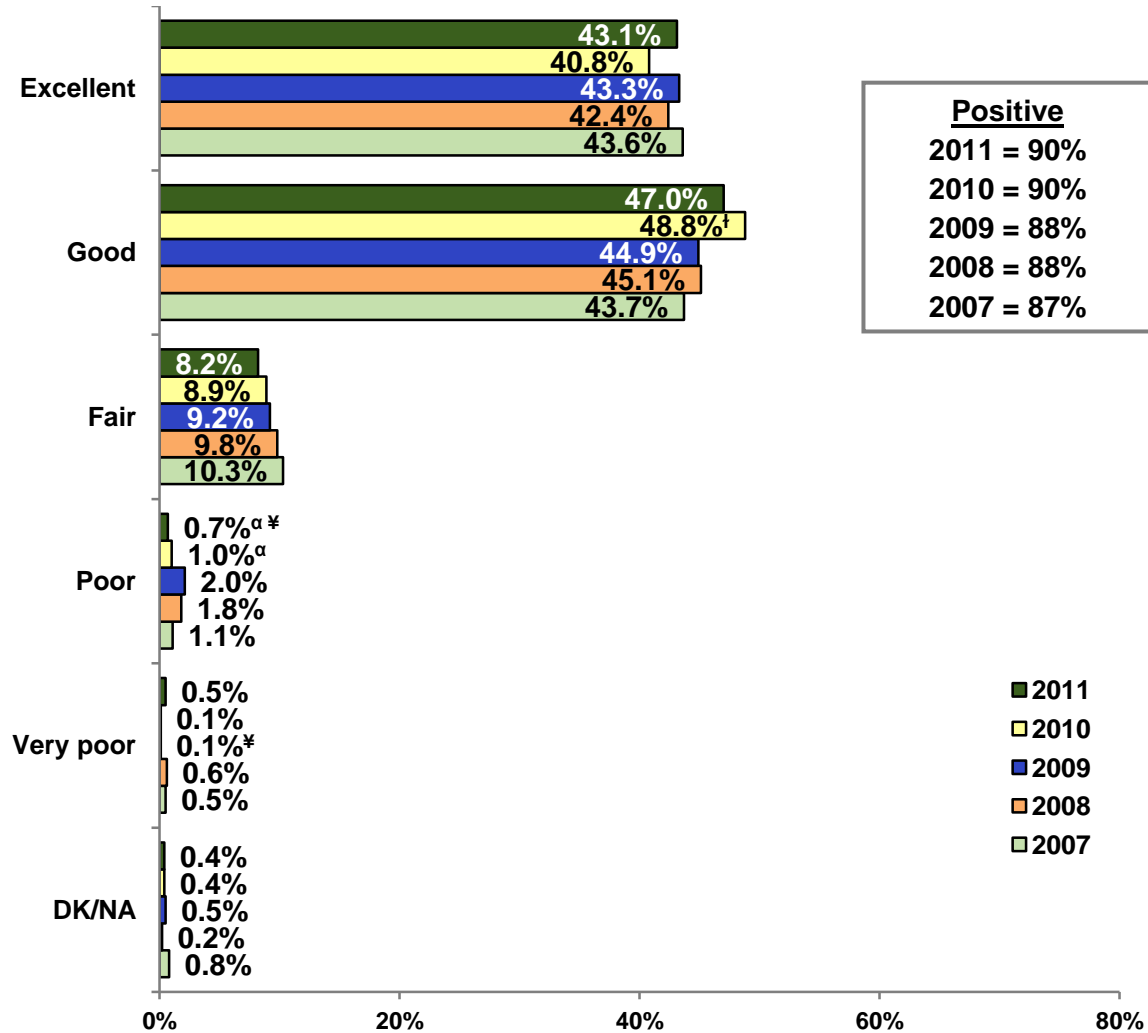
¹⁸ Multiple responses permitted; the percentages in the figure total more than 100 percent. For this figure, categories with less than one percent were combined into "Other." Please see Appendix B: Survey Toplines for a complete breakdown of responses.



EXPERIENCE VISITING THE CARLSBAD VILLAGE

In a typical month, 94 percent of residents visit Carlsbad’s Downtown Village,¹⁹ with the majority visiting at least once a week (51%). Consistent with previous years, nine out of ten residents who visited the Village rated their experience positively, with 43 percent indicating they had an “Excellent” experience and 47 percent reporting a “Good” experience.

Figure 26: Experience Visiting Carlsbad Village²⁰



[#] Statistically significant change from 2010 (p<.05)

^α Statistically significant change from 2009

[‡] Statistically significant change from 2008

[†] Statistically significant change from 2007

¹⁹ Wording of this question changed slightly in 2011. As such, previous years’ data are not displayed.

²⁰ Residents who were not sure whether or not they had visited the Village were filtered out of the analysis for their experience visiting the Village. As such, the percentages displayed for 2008 and 2007 differ slightly from those presented in the 2008 and 2007 reports.



The following 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 (day and night), satisfaction with the job the city is doing to provide services, and satisfaction with city-resident communication.
- The percentage of residents who regularly visited the Village increased with length of residence (Less than 1 year: 35%, 1 to 4 years: 41%, 5 to 9 years: 43%, 10 to 14 years: 52%, 15 or more years: 64%).
 - Residents who have lived in Carlsbad less than one year and have visited the Village were the most likely to rate their experience as "Excellent" (61%).
- Sixty-five percent of residents living in apartments regularly visited the Village as compared to 49 percent of residents in single family detached homes or condominiums and townhomes. Apartment dwellers were also more likely to rate their experience as "Excellent" (58% vs. 42%).
- Residents of zip code 92009 were the least likely to report visiting the Village in a typical month (92009: 89%, 92008: 98%, 92010: 97%, 92011: 95%). By neighborhood, frequency of not visiting the Village in a typical month was highest among residents living in the Rancho La Costa/ La Costa Oaks/ La Costa Ridge (17%) and La Costa/ La Costa Canyon (11%) 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	83,248 Residents 18 Years and Older within the City of Carlsbad
Number of Respondents	1,000 Residents Completed a Survey
Average Length	20 minutes
Field Dates	September 13 – October 2, 2011
Margin of Error	The <i>maximum</i> margin of error for questions answered by all 1,000 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 2010 study. The main research objectives of the study were to assess residents' perceptions regarding satisfaction with city services, quality of life, sense of community, safety in their neighborhoods, city government, city-resident communication, and the Carlsbad Village.

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 both a random digit dial (RDD) methodology (listed and unlisted traditional land line numbers) 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. The listed sample supplemented the RDD methodology and included both land lines and cell phones 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 just 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 1,000 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) 2010 demographic estimates for the City of Carlsbad (2011 estimates had not been released at the time of data processing). It is estimated that among Carlsbad's 106,804 residents, 83,248 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 1,000 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!"

Screener 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).

29.1%	92008 [Continue]
34.3%	92009 [Continue]
15.4%	92010 [Continue]
21.1%	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?

5.1%	Less than 1 year
21.9%	1 to 4 years
19.8%	5 to 9 years
20.3%	10 to 14 years
32.9%	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)?

61.1%	Very satisfied
33.3%	Somewhat satisfied
1.8%	Somewhat dissatisfied
1.0%	Very dissatisfied
2.8%	(Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=972)

62.8%	Very satisfied
34.3%	Somewhat satisfied
1.9%	Somewhat dissatisfied
1.0%	Very dissatisfied

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

63.9% Excellent
34.2% Good
1.0% Fair
0.5% Poor
0.2% Very poor
0.3% (Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=997)

64.1% Excellent
34.3% Good
1.0% Fair
0.5% 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?

17.1% Getting better
11.0% Getting worse
68.1% Staying about the same
3.8% (Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=962)

17.8% Getting better
11.4% Getting worse
70.8% Staying about the same

[ASK Q5 IF Q3= "POOR" OR "VERY POOR" OR Q4= "GETTING WORSE"]

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)

(n=114)

- 26.7% Stop building/ stop growth
- 15.5% Fix the traffic problems
- 10.7% Increase/ improve police services
- 5.9% Improve schools
- 5.0% Improve the quality of the roads and other infrastructure
- 3.9% Increase recreation opportunities
- 3.4% More public transportation
- 3.3% Listen to the residents/ care more about people in the community
- 2.9% Address the gang problem
- 2.6% Preserve more open space
- 2.3% More affordable housing
- 1.6% More jobs
- 1.6% Be more business friendly/ provide more shops
- 0.9% Need new mayor and/ or city council
- 0.8% Remove the illegal immigrants
- 0.8% Build desalination plant
- 0.7% Improve beach access
- 0.7% Better economic plan/ lower taxes
- 1.5% Nothing needs improvement
- 5.3% Other (Specify:_____)
- 4.0% DK/NA

[Q6 ASKED TO ALL RESPONDENTS]

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	86.2%	12.4%	0.7%	0.0%	0.7%
B. Walking alone in your neighborhood after dark	54.2%	35.8%	4.9%	0.7%	4.4%

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=993)	86.9%	12.5%	0.7%	0.0%
B. Walking alone in your neighborhood after dark (n=956)	56.7%	37.5%	5.1%	0.7%

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)?

28.5%	Very strong
43.9%	Somewhat strong
18.1%	Somewhat weak
2.3%	Very weak
4.8%	None at all
2.4%	(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	26.3%	48.8%	6.3%	15.5%	2.5%	0.7%
B. Very few of my neighbors know me	7.6%	27.5%	4.7%	44.9%	14.7%	0.6%
C. I have almost no influence over what my neighbor is like	7.7%	29.4%	11.4%	40.6%	9.1%	1.9%
D. My neighbors and I want the same things from this community	23.1%	51.8%	12.3%	6.1%	0.6%	6.2%
E. If there is a problem in my neighborhood, people who live here can get it solved	17.6%	51.5%	12.8%	11.2%	1.9%	5.0%
F. It is very important for me to feel a sense of community with other residents	27.8%	51.3%	11.3%	7.6%	0.8%	1.2%

Q9

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

17.4% Very confident
66.1% Somewhat confident
10.3% Somewhat unconfident
2.5% Very unconfident
3.7% (Don't Read) DK/NA

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.

Q10

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 and roads	45.4%	41.6%	3.0%	6.6%	3.0%	0.5%
B. Manage traffic congestion on city streets	32.7%	44.0%	6.1%	10.1%	6.1%	1.0%
C. Manage residential growth and development	27.1%	41.1%	9.8%	10.9%	6.3%	4.8%
D. Maintain the business climate in Carlsbad	38.0%	38.6%	8.9%	4.8%	2.1%	7.5%
E. Provide fire protection and emergency medical services	70.9%	19.2%	4.5%	1.1%	0.3%	4.0%
F. Provide law enforcement services	64.2%	26.0%	2.7%	2.9%	2.9%	1.4%
G. Provide local arts and cultural opportunities	48.5%	34.6%	7.0%	4.1%	0.8%	5.0%
H. Provide library services	74.4%	18.4%	3.2%	0.9%	0.2%	2.8%
I. Provide water services	58.9%	29.9%	3.5%	3.3%	1.0%	3.4%
J. Provide sewer services	57.9%	28.6%	6.4%	1.4%	0.6%	5.0%
K. Maintain city parks	64.8%	28.2%	2.5%	1.7%	0.3%	2.4%
L. Provide recreation programs	51.1%	28.7%	8.1%	2.9%	0.8%	8.5%
M. Provide trails and walking paths	56.8%	27.6%	5.3%	4.4%	1.6%	4.5%
N. Protect water quality in the city's creeks, lagoons, and ocean	40.5%	36.0%	8.9%	4.7%	3.2%	6.7%
O. Trash collection services	66.8%	25.1%	2.5%	2.7%	1.6%	1.3%
P. Street sweeping services	50.3%	31.8%	8.1%	3.6%	2.1%	4.0%
Q. Hazardous waste disposal	34.7%	27.9%	13.6%	7.3%	3.0%	13.5%
R. Recycling collection services	54.9%	27.6%	3.9%	8.0%	4.2%	1.3%
S. Protect and enhance open space and the natural environment	41.2%	35.9%	7.2%	8.4%	4.7%	2.6%

Q10 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=995)	45.6%	41.8%	3.0%	6.6%	3.0%
B. Manage traffic congestion on city streets (n=990)	33.0%	44.4%	6.2%	10.2%	6.2%
C. Manage residential growth and development (n=952)	28.5%	43.2%	10.3%	11.4%	6.6%
D. Maintain the business climate in Carlsbad (n=925)	41.1%	41.8%	9.6%	5.2%	2.3%
E. Provide fire protection and emergency medical services (n=960)	73.8%	20.0%	4.7%	1.2%	0.3%
F. Provide law enforcement services (n=986)	65.1%	26.4%	2.7%	2.9%	2.9%
G. Provide local arts and cultural opportunities (n=950)	51.1%	36.5%	7.3%	4.3%	0.8%
H. Provide library services (n=972)	76.6%	18.9%	3.3%	1.0%	0.2%
I. Provide water services (n=966)	60.9%	30.9%	3.6%	3.5%	1.1%
J. Provide sewer services (n=950)	61.0%	30.1%	6.7%	1.5%	0.7%
K. Maintain city parks (n=976)	66.5%	28.9%	2.5%	1.7%	0.4%
L. Provide recreation programs (n=915)	55.8%	31.3%	8.8%	3.2%	0.9%
M. Provide trails and walking paths (955)	59.4%	28.8%	5.5%	4.6%	1.7%
N. Protect water quality in the city's creeks, lagoons, and ocean (n=933)	43.4%	38.6%	9.5%	5.1%	3.5%
O. Trash collection services (n=987)	67.7%	25.5%	2.5%	2.7%	1.6%
P. Street sweeping services (n=960)	52.4%	33.1%	8.5%	3.8%	2.2%
Q. Hazardous waste disposal (n=865)	40.1%	32.2%	15.8%	8.4%	3.5%
R. Recycling collection services (n=987)	55.7%	28.0%	3.9%	8.2%	4.3%
S. Protect and enhance open space and the natural environment (n=974)	42.3%	36.9%	7.4%	8.6%	4.9%

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

Q11 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)?

48.3%	Very satisfied
39.1%	Somewhat satisfied
5.3%	Somewhat dissatisfied
1.7%	Very dissatisfied
5.7%	(Don't Read) DK/NA

WITH DK/NA FACTORED OUT (n=943)

51.2%	Very satisfied
41.4%	Somewhat satisfied
5.6%	Somewhat dissatisfied
1.8%	Very dissatisfied

Q12 How often are you using the following sources of information when you want to find out about city issues, programs, and services?

	<u>Regularly</u>	<u>Sometimes</u>	<u>Seldom</u>	<u>Never</u>	<u>(Don't Read) DK/NA</u>
A. The City of Carlsbad website	18.9%	30.3%	22.2%	28.1%	0.5%
B. The North County Times or www.nctimes.com	24.2%	21.0%	16.8%	37.7%	0.3%
C. The San Diego Union-Tribune or www.signonsandiego.com	23.4%	22.8%	14.7%	38.7%	0.3%
D. The community services and recreation guide	23.4%	28.6%	20.7%	25.6%	1.7%
E. Social media websites such as Facebook, Twitter, or YouTube	13.0%	12.3%	14.1%	59.9%	0.7%
F. Carlsbad Currents newsletter	20.9%	20.8%	18.3%	36.5%	3.4%
G. Flyers that come in your water bill	29.8%	22.1%	16.5%	26.5%	5.0%
H. Flyers at city buildings like the library, senior center, or community centers	14.1%	24.8%	24.6%	36.0%	0.5%
I. City cable channel	6.0%	14.4%	18.7%	58.6%	2.2%
J. Television news	34.8%	27.0%	14.9%	22.1%	1.2%

Q13 Have you communicated directly with the City of Carlsbad staff on issues related to city business in the past 12 months?

21.2% Yes
78.1% No
0.7% (Don't Read) DK/NA

[ASK Q14 IF Q13 = "YES", OTHERWISE SKIP TO Q15]

Q14 How did you communicate with staff on the issues related to city business?
[ALLOW MULTIPLE RESPONSES]

(n=212)

- 59.8% Telephone
- 35.3% In-person
- 24.0% Email
- 4.4% Written letter
- 4.4% Completing a web form
- 1.1% (Don't Read) DK/NA

Q15 What TV service, including cable TV, does your home subscribe to?

- 57.3% Time Warner
- 22.3% AT&T U-Verse
- 6.5% Direct TV
- 5.4% Dish Network
- 1.1% Cox
- 5.5% None
- 0.6% Other
- 1.2% DK/NA

Q16 How often do you or members of your household watch the city's cable channel that broadcasts city council meetings and other programming specific to the City of Carlsbad?

3.6% Regularly
11.6% Sometimes
21.8% Seldom
62.5% Never
0.5% DK/NA

Percentages below represent viewership for subscribers of Time Warner and AT&T (n=797)

4.5% Regularly
12.8% Sometimes
24.5% Seldom
58.0% Never
0.2% DK/NA

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

Q17 Have you seen or heard anything during the past year about how residents can prevent the pollution of our creeks, lagoons, and ocean?

63.8% Yes [GO TO Q18]
34.5% No [SKIP TO Q20]
1.7% (Don't Read) DK/NA [SKIP TO Q20]

WITH DK/NA FACTORED OUT (n=983)

64.9% Yes
35.1% No

[IF Q17 = "NO" OR "DK/NA" SKIP TO Q20, OTHERWISE ASK Q18 THROUGH Q19]

Q18

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

(n=638)

- 28.6% TV
- 18.5% Newspaper
- 15.8% Newsletters
- 13.4% Curb signs
- 10.5% Brochures
- 9.6% Water/ utility bill
- 8.6% Website
- 7.0% Radio
- 5.6% Family/ friends/ other word of mouth
- 3.4% Public events/ booth
- 3.4% Signs near lagoons/ beach/ trails
- 2.2% School
- 2.1% Flyer
- 1.5% Posters
- 1.0% Internet
- 1.0% Movie theaters
- 0.9% City building or library
- 0.9% Lagoon Foundation/ Lagoon Center
- 0.9% Common sense/ It's all over the place
- 0.6% Church
- 0.5% Surfrider Foundation
- 5.5% Other (Specify: _____)
- 10.3% DK/NA

Q19

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=638)

- 22.2% Properly disposed of hazardous waste
- 16.3% Used a commercial car wash
- 14.2% Recycled
- 12.6% Used environmentally friendly soaps, pesticides, etc.
- 10.9% Cleaned up trash at parks and beaches/ on the street
- 7.7% Careful of what goes down sewer/ no longer dump down storm drain
- 6.5% Reduced water usage/ used water more efficiently
- 5.2% Don't litter
- 4.2% Cleaned up animal waste
- 3.3% Reduced run-off/ erosion control
- 2.8% I do everything I can/ I don't pollute
- 1.1% Stopped washing driveway
- 0.7% Reduce trash/ plastics
- 0.6% Used different/ less pesticides
- 0.4% Fixed leaks
- 0.4% Changed landscaping
- 0.3% Composting
- 0.3% Taught others/ reported violators
- 0.2% Don't wash cars as much/ don't wash in driveway
- 5.7% Other
- 20.8% Have not done anything
- 3.9% DK/NA

[Q20 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.

Q20

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]

- 50.8% Regularly, once a week or more
- 27.9% Sometimes, once a month or more
- 15.1% Seldom, less than once a month
- 5.9% Never [SKIP TO QA]
- 0.3% (Don't Read) DK/NA [SKIP TO QA]

[IF Q20= "NEVER" OR "DK/NA" SKIP TO QA, OTHERWISE ASK Q21]

Q21 How would you rate your experience while visiting Carlsbad's downtown village?

(n=938)

43.1%	Excellent
47.0%	Good
8.2%	Fair
0.7%	Poor
0.5%	Very poor
0.4%	DK/NA

WITH DK/NA FACTORED OUT (n=934)

43.3%	Excellent
47.2%	Good
8.3%	Fair
0.7%	Poor
0.5%	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?

22.4%	Rent
75.0%	Own
2.6%	(Don't Read) Refused

QB Which of the following best describes your current home?

69.2%	Single family detached home
9.9%	Apartment
18.5%	Condominium or Town Home
1.6%	Mobile home
0.9%	(Don't Read) Refused

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

57.5%	No children
15.5%	1 child
18.9%	2 children
7.0%	3 or more children
1.1%	Refused

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

11.0%	18 to 24 years
12.2%	25 to 34 years
16.3%	35 to 44 years
21.5%	45 to 54 years
17.4%	55 to 64 years
19.1%	65 years or older
2.5%	Refused

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

13.2%	La Costa / La Costa Canyon
6.6%	Aviara
6.6%	Olde Carlsbad
6.6%	Calavera Hills
6.3%	Village or Downtown Carlsbad
4.7%	Rancho Carrillo
2.1%	Poinsettia
2.0%	Tamarack Point
1.9%	La Costa Greens
1.4%	Rancho Carlsbad or Sunny Creek
1.3%	Bressi Ranch
0.9%	La Costa Ridge
0.8%	La Costa Oaks
0.4%	Terramar
0.4%	Barrio
0.4%	Kelly Ranch
0.2%	Carlsbad Ranch
0.2%	North Beach
0.2%	Hedionda Point
0.1%	Industrial Corridor / City Centre
0.1%	Rancho La Costa
0.1%	South Beach
5.5%	None, I just live in Carlsbad
26.9%	Other
11.4%	DK/NA

QE Breakdown of respondents' neighborhood identification

69.0% Identified with a Carlsbad neighborhood
19.0% Did not identify with a neighborhood
12.0% Identified with an HOA

[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=219)

26.2% North
70.1% South
3.6% (Don't Read) 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=219)

53.8%	North
40.8%	South
5.3%	(Don't Read) 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=68)

19.3%	East
77.8%	West
3.0%	(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=270)

73.9%	East
22.5%	West
3.6%	(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=238)

26.7%	North
66.9%	South
6.4%	(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=119)

50.1%	North
39.9%	South
10.0%	(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=119)

66.1%	North
12.3%	South
21.7%	(Don't Read) Refused

Neighborhood breakdown with data added from QF through QL responses and HOAs included

13.2%	La Costa / La Costa Canyon
10.8%	Olde Carlsbad
7.7%	Calavera Hills
7.3%	Village or Downtown Carlsbad
6.6%	Aviara
4.7%	Rancho Carrillo
4.5%	Calavera Hills/ Tamarack Point
4.5%	Olde Carlsbad/ Hedionda Point
4.1%	Poinsettia
2.7%	Rancho La Costa/ La Costa Ridge
2.6%	Poinsettia/ Aviara
2.4%	Rancho La Costa/ La Costa Oaks
2.0%	Tamarack Point
1.9%	La Costa Greens
1.4%	Rancho Carlsbad or Sunny Creek
1.3%	Bressi Ranch
1.1%	South Beach
1.0%	North Beach/ Barrio
0.9%	La Costa Ridge
0.8%	La Costa Oaks
0.8%	North Beach
0.7%	Bressi Ranch/ Rancho Carrillo/ La Costa Greens
0.4%	Terramar
0.4%	Barrio
0.4%	Kelly Ranch
0.2%	Carlsbad Ranch
0.2%	Hedionda Point
0.1%	Industrial Corridor / City Centre
0.1%	Rancho La Costa
12.0%	HOA
0.6%	None, I just live in Carlsbad
1.5%	Other
1.3%	DK/NA

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

72.1%	White or Caucasian
12.3%	Hispanic or Latino
6.2%	Asian
0.7%	African American or Black
1.6%	Other
7.2%	(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):

47.7%	Male
52.3%	Female