Community Characteristics Survey
Summary Report

Prepared for the
City of San Carlos


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INTRODUCTION

Encompassing 5.6 square miles in San Mateo County, the City of San Carlos was incorporated in 1925 as a General Law city and is currently home to an estimated 30,722 residents.[1] The City's dedicated team of full-time and part-time employees provides a full suite of services to residents and local businesses directly or via a shared-service model with other agencies and providers.

Every two years and most recently in 2020, the City of San Carlos conducts a C*ommunity Opinion Survey* as a performance measurement tool to profile residents' needs and priorities, measure how well the City is performing in meeting needs through existing services and facilities, gather data on a variety of quality-of-life, issue, and policy-related matters, and track in a statistically reliable way how opinions and priorities may have changed over the prior two-year period.

For the first time in 2019, the City sought to conduct a a statistically reliable lifestyle and demographic survey of residents as a compliment to its bi-annual survey. Whereas the *Community Opinion Survey* focuses on the community's views of the City's performance, the *Community Characteristics Survey* sought to provide the City with a better understanding of the community itself. By exploring residents' values and aspirations, lifestyle characteristics, and demographics, the survey provided the City with better insights about the residents it serves and the factors that may shape the community's character in the future.

MOTIVATION FOR RESEARCH Although not planned as such, the 2019 *Community Characteristics Survey* provided a very timely snapshot of San Carlos residents' characteristics, experiences, behaviors, and expectations under 'normal' conditions. Just a few weeks after the survey was complete, the coronavirus pandemic arrived in California. In addition to the direct economic impacts including job losses, salary cuts, and reduced spending, the threat of COVID-19 and the closure of non-essential businesses dramatically altered how and where people work, play, shop, and travel. As we approach the third year of the pandemic, the 2022 *Community Characteristics Survey* presents an opportunity to understand the extent to which San Carlos residents' lifestyles, needs, and expectations may have changed in response to these challenging times.

To assist in this effort, the City selected True North Research to design the research plan and conduct the study. Broadly defined, the survey was designed to:

- Assess residents' perceptions about life in San Carlos and their plans for remaining in the City in the future;
- Examine how connected San Carlos residents are with their local community, including whether they belong to community groups and how well they know their neighbors;
- Profile residents' employment, commute, and transportation behaviors;
- Gather opinions on lifestyle topics such as recreation preferences, media use, and utilization of housecleaning, landscaping, and home delivery services; *and*
- Collect background and demographic data to better understand the profile of San Carlos residents.

1. United States Census estimate for City of San Carlos population, April 2020.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 51). In brief, the survey was administered to a random sample of 791 adults who reside within the City of San Carlos. The survey followed a mixed-method design that employed multiple recruiting methods (email, text, and telephone) and multiple data collection methods (telephone and online). Administered between January 13 and January 25, 2022, the average interview lasted 17 minutes.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the survey. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 54) and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGEMENTS True North thanks the City of San Carlos for the opportunity to conduct the study and for contributing valuable input during the design stage of this study. The collective experience, insight, and local knowledge provided by city representatives and staff improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the City of San Carlos. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, establishing fiscal priorities, passing revenue measures, and developing effective public information campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,200 survey research studies for public agencies—including more than 400 studies for California municipalities and special districts.

KEY FINDINGS

The following is an outline of the main findings from the survey. For the reader's convenience, we have organized the findings according to the section titles used in the body of this report. Thus, if you would like to learn more about a particular finding, simply turn to the appropriate report section.

LIVING IN SAN CARLOS

- San Carlos residents were most apt to cite the small town feeling (23%) as what they like best about living in the City of San Carlos, followed by it being a nice, neighborly community (22%), the downtown area (19%), and the ability to walk to many destinations in the City (18%). Other specific attributes that were mentioned by at least 10% of respondents included San Carlos' location and accessibility (15%), shopping/dining options (14%), family-oriented nature (14%), and public safety/low crime (14%).
- When asked to indicate the one thing that they would most like to change about San Carlos, the most common specific changes desired were limiting growth and development (18%), providing more affordable housing (12%), providing a greater variety of restaurants and stores (9%), reducing traffic congestion (9%), and improving/maintaining infrastructure, roads, and sidewalks (8%).
- The majority of residents (51%) expect to still be living in San Carlos 10 years from now, 14% do not plan to remain in the City, and one-third (34%) were unsure or unwilling to share where they will be living in 10 years.
- Forty-one percent (41%) of all residents surveyed either anticipated retiring in San Carlos (23%) or were already in retirement (17%). An additional 23% did not anticipate retiring in San Carlos (9%) or living in the City in 10 years (14%), whereas the remaining 36% were unsure or unwilling to share their retirement plans.
- The majority of San Carlos respondents had lived in the City 15 years or longer (52%), whereas one-in-five were newer residents that had lived in the City less than 1 year (4%) or 1 to 4 years (18%). An additional 14% had resided in San Carlos for 5 to 9 years and 13% had lived in the City between 10 and 14 years.
- Approximately three-quarters of San Carlos residents surveyed in 2022 live in a detached, single-family home (75%), whereas 13% live in an apartment, 6% a condominium, 4% a town-home, and 2% live in some other type of residence or preferred to not answer the question.
- The vast majority of San Carlos residents surveyed in 2022 own their home (66%). The remainder either rent (26%), live rent free with family (5%), or were unwilling to state (4%).[2]
- When home owners who live in a detached, single-family home were asked if they plan to build an accessory dwelling unit, or granny flat, on their San Carlos property in the next five years, eight percent answered in the affirmative.
- One-third (34%) of San Carlos residents who plan to build an ADU also plan to rent it for supplemental income, whereas the remainder either do not plan to rent the unit for income (36%) or were unsure of their plans (31%).

2. Factoring out the 'live rent free with family' and prefer not to answer responses (which aren't options on the US Census) and recalculating the percentages results in a homeownership rate of 72%, which is consistent with US Census estimates for San Carlos.

COMMUNITY CONNECTIONS

- Overall, 14% of respondents described themselves as very engaged and connected to the community in 2022, 36% were somewhat engaged and connected, and 37% slightly engaged and connected. Another 11% of respondents confided that they do not feel at all engaged or connected to the San Carlos community.
- Three-in-ten respondents (29%) belonged to an organized community group in the City, whereas 63% did not and the remainder were either unsure or unwilling to state. There is a strong, positive relationship between belonging to a community group and feeling very engaged and connected to the San Carlos community.
- Five percent (5%) of residents revealed that they know all the neighbors who live close to them well, 24% know most of their neighbors well, 55% know some of them well, and 15% confided that they do not know any of their neighbors well.

EMPLOYMENT, COMMUTE & TRANSPORTATION

- When asked about their employment status, approximately seven-in-ten respondents indicated they are employed either full-time (61%) or part-time (9%), 21% selected retired, 3% homemaker, 3% student, 2% are in-between jobs, and 2% were unsure or unwilling to state.
- San Carlos residents work across a wide variety of occupational categories. Overall, 26% of employed residents who provided an opinion indicated that their current occupation falls within the professional specialty category such as accountant, lawyer, engineer, scientist, or laboratory technician, 11% work in an executive occupation such as general manager, CEO, CFO, controller, or business owner, 9% work in an information technology position, 8% are supervisors or managers, 6% work in sales, 6% are teachers, and 4% are office or administrative workers.
- When asked to describe their *industry*, 30% of employed residents who provided an opinion indicated that they work in information technology manufacturing services, 10% work in education, 8% in business services, 8% work in medical and social services, 7% in biosciences or pharmaceuticals, and 6% work in the financial services industry.
- Nearly half of employed respondents in 2022 (47%) stated that they work from home, whereas 25% commute to a work location outside the home and 28% do a mixture of both. The 2022 findings are in stark contrast to the results found in the 2019 survey just prior to pandemic, when more than eight-in-ten employed San Carlos residents (86%) commuted to a work site outside of their home.
- Among the 75% of employees who work from home at least occasionally, most (42%) indicated that they primarily work from home five days per week, with the remainder reporting they do so four (11%), three (10%), two (7%) or one day per week (4%).
- Seven percent (7%) of *all* employed residents own a home based business in the City.
- Among employees who occasionally commute to a work location outside of their home, the most common method of commuting was driving alone to work in a car, truck, SUV, or van (83%). Public transit via Caltrain (5%) or other public transit mode (1%) accounted for approximately 6% of commutes and ridesharing via carpool accounted for approximately 3% of commutes. Active transportation modes (biking, walking, jogging, running) were mentioned by 6% of employees as their primary method of commuting to work. All other modes were mentioned by just 1% of respondents, collectively.
- The average commute length among all commuters was 13.13 miles, one-way, which is lower than the 15.45 miles average commute distance recorded in 2019.

- The average commute duration among all commuters was 26.2 minutes in 2022, one-way, which is somewhat less than the 33.6 minutes reported in 2019.
- Regardless of their employment status, nearly all residents use a personal vehicle when traveling within San Carlos (97%) and three-quarters walk from home to a local store or restaurant (76%). Less than half of residents ride a bicycle (42%) or use Uber or Lyft (38%) when traveling within the City, and just 8% ride a local bus.
- Twenty-three percent (23)% of residents reported that they own a hybrid and 19% own an all-electric vehicle.
- Just over one-third of all-electric vehicle owners (36%) find it difficult to charge their vehicle in San Carlos.

HEALTH & LIFESTYLE

- Walking, jogging, and running was the most popular adult recreation activity (47%), followed by hiking/nature walks (33%), cycling (21%), and exercising/gym/yoga (15%).
- Playing soccer (9%) and cycling (9%) were the most popular recreation activities among children and teenagers, followed by walking, jogging, and running (7%), going to the park/beach (7%), and hiking/nature walks (5%).[3]
- Forty-seven percent (47%) of residents reported using a house cleaner and 52% a landscape maintenance service or gardener.
- Overall, 96% of residents have goods and packages delivered to their home from Amazon or other online retailers, with nearly two-thirds (65%) doing so weekly.
- More than seven-in-ten respondents (72%) also indicated they have food, meals and groceries delivered to their home, with 30% having weekly deliveries.
- The average San Carlos resident spends nearly six hours in a typical day utilizing the Internet, not including social media (228 minutes per day) and watching television (121 minutes per day). Residents spend approximately an hour or more consuming news (73 minutes), using social media (66 minutes), reading books or magazines (62 minutes), and listening to the radio (57 minutes). San Carlos residents spend the least amount of time playing video games in a typical day (19 minutes).

PANDEMIC

- Approximately one-third of respondents (32%) stated the pandemic is currently having a big impact on their household, with an additional 47% describing the impact as moderate. Approximately one-in-five respondents indicated that the pandemic's current impacts on their household are either small (17%) or negligible (4%), whereas 1% preferred to not answer the question.
- Among those who indicated the pandemic is currently having a big or moderate impact on their household, the most commonly reported impacts were the inability to socialize or gather with friends and family (32%), isolation/staying home (14%), working from home (14%), and restrictions on travel (12%), ability to go out for entertainment/dining (12%), and engage in activities (12%).

3. The majority of residents do not have a child or teen in their home (54%), which is why the percentage figures for child/teen activities tend to be lower when compared to the adult percentages.

Living in San Carlos

The opening series of questions was designed to assess residents' top of mind perceptions about living in San Carlos, profile their housing characteristics, and gather information on whether they intend to remain in San Carlos in the future.

WHAT DO YOU LIKE MOST ABOUT LIVING IN SAN CARLOS? The first question in this series asked residents to identify what they like best about living in the City of San Carlos. Question 2 was posed in an open-ended manner, thereby allowing residents to mention any aspect or attribute that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 1 below.

San Carlos residents were most apt to cite the small town feeling (23%) as what they like best about living in the City of San Carlos, followed by it being a nice, neighborly community (22%), the downtown area (19%), and the ability to walk to many destinations in the City (18%). Other specific attributes that were mentioned by at least 10% of respondents included San Carlos' location and accessibility (15%), shopping/dining options (14%), family-oriented nature (14%), and public safety/low crime (14%). Table 1 on the next page presents the top-five aspects that respondents liked most about living in San Carlos in 2019 and 2022.

Question 2 *What do you like best about living in San Carlos?*

FIGURE 1 LIKE BEST ABOUT SAN CARLOS

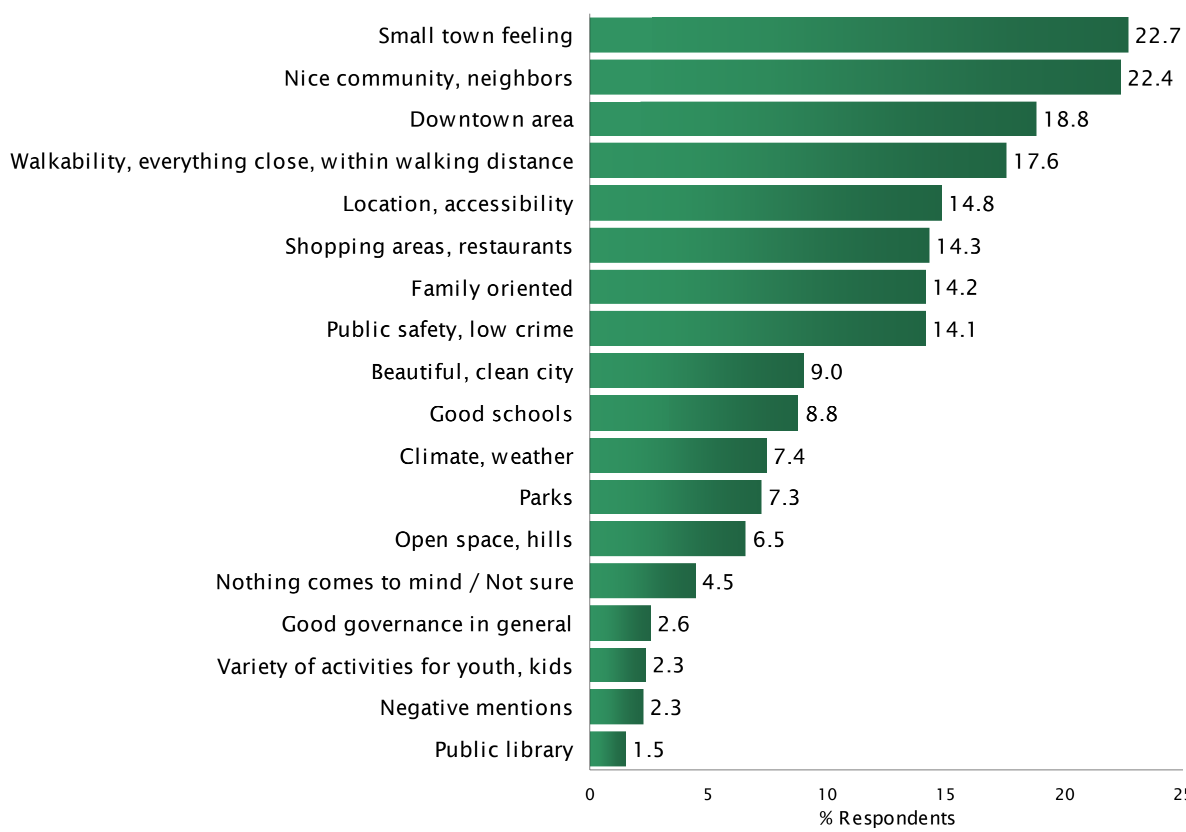


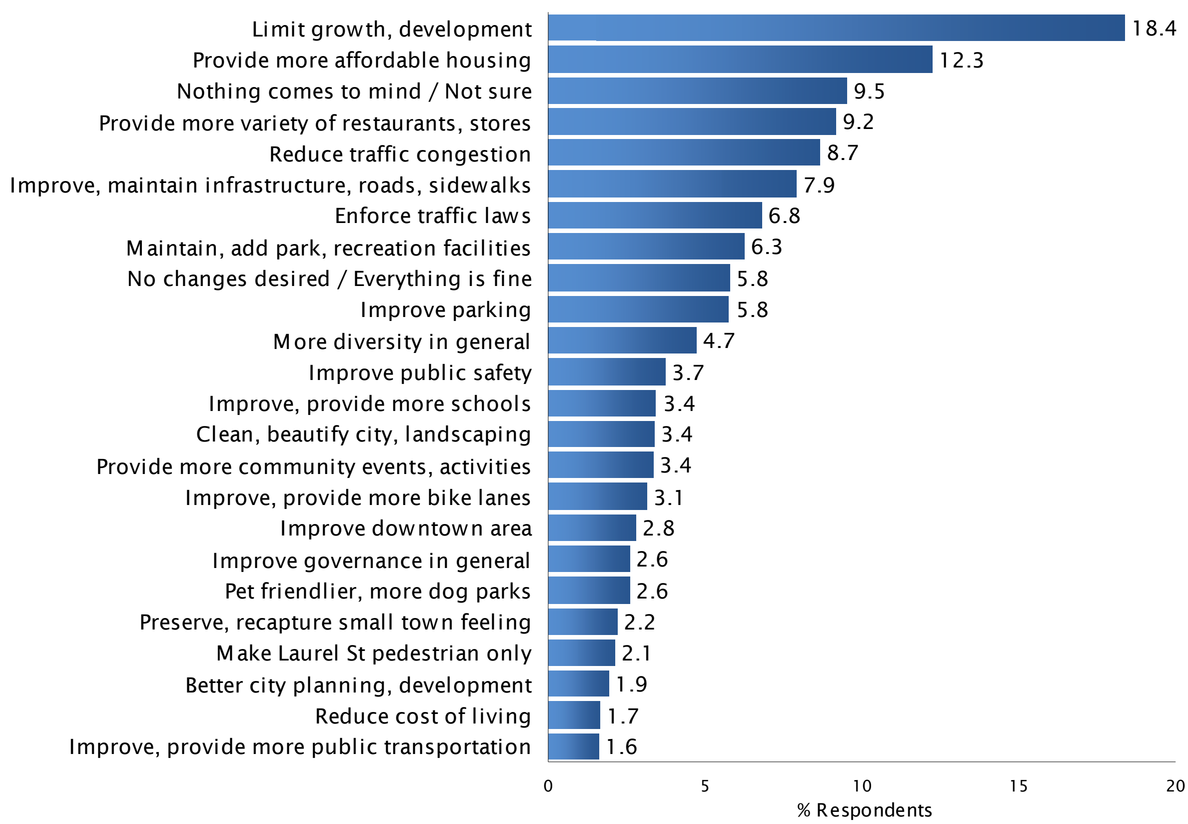
TABLE 1 LIKE BEST ABOUT SAN CARLOS BY STUDY YEAR

Study Year 2022	Study Year 2019
Small town feeling	Small town feeling
Nice community, neighbors	Nice community, neighbors
Downtown area	Location, accessibility
Walkability, everything close, within walking	Family oriented
Location, accessibility	Public safety, low crime

WHAT SHOULD BE CHANGED? In an open-ended manner similar to that described above for Question 2, all respondents were also asked to indicate the one thing that they would most like to change about San Carlos. True North reviewed the verbatim responses to Question 3 and grouped them into the categories shown in Figure 2.

Question 3 *What is the thing you would most like to change about San Carlos?*

FIGURE 2 CHANGES TO IMPROVE SAN CARLOS



Among specific changes desired, the most common were limiting growth and development (18%), providing more affordable housing (12%), providing a greater variety of restaurants and stores (9%), reducing traffic congestion (9%), and improving/maintaining infrastructure, roads, and sidewalks (8%). Approximately 16% of respondents could not think of any desired changes (10%) or reported that no changes are needed (6%). Although the top-mentioned improvement (limiting growth and development) was the same in 2022 as in 2019, a desire for more affordable housing rose to the second position in 2022 (see Table 2).

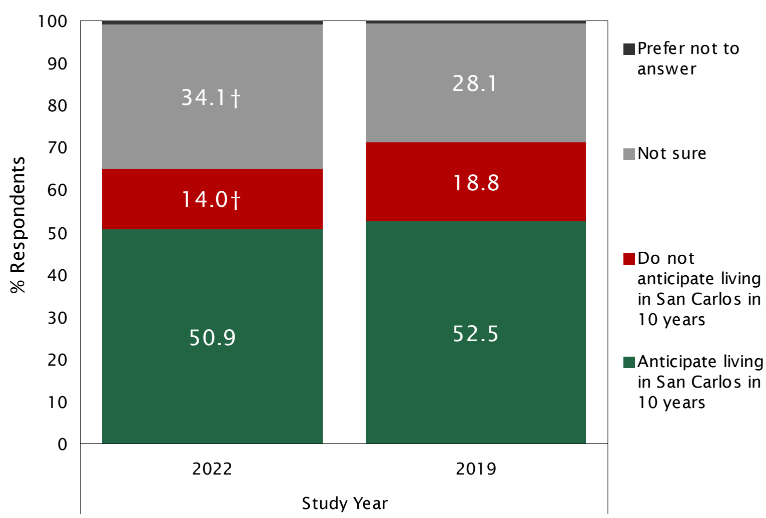
TABLE 2 CHANGES TO IMPROVE SAN CARLOS BY STUDY YEAR

Study Year 2022	Study Year 2019
Limit growth, development	Limit growth, development
Provide more affordable housing	Reduce traffic congestion
Nothing comes to mind / Not sure	Improve parking
Provide more variety of restaurants, stores	Improve, maintain infrastructure, roads, sidewalks
Reduce traffic congestion	Nothing comes to mind / Not sure

PLAN TO REMAIN IN SAN CARLOS Respondents were next asked about their future intentions, specifically whether they anticipate living in San Carlos 10 years from now (Question 4) as well as once they are retired (Question 5). As shown in Figure 3, the majority of residents (51%) expect to still be living in San Carlos 10 years from now, 14% do not plan to remain in the City, and one-third (34%) were unsure or unwilling to share where they will be living in 10 years. The percentage who expected *not* to be living in San Carlos 10 years from now declined significantly between 2019 and 2022, while those who were unsure increased significantly.

Question 4 *Do you anticipate that you will be living in San Carlos 10 years from now?*

FIGURE 3 ANTICIPATE LIVING IN SAN CARLOS 10 YEARS FROM NOW BY STUDY YEAR



Figures 4 through 6 display residents' future housing plans by a variety of demographic characteristics. When compared to their respective counterparts, residents who had lived in San Carlos at least five years, those between 35 and 44 years of age, individuals who indicated they are very engaged and connected to the San Carlos community, those with children under 13 years of age in their household, home owners, and Asian American and Caucasian respondents were the most likely to anticipate remaining in San Carlos for at least the next 10 years.

FIGURE 4 ANTICIPATE LIVING IN SAN CARLOS 10 YEARS FROM NOW BY YEARS IN SAN CARLOS & AGE

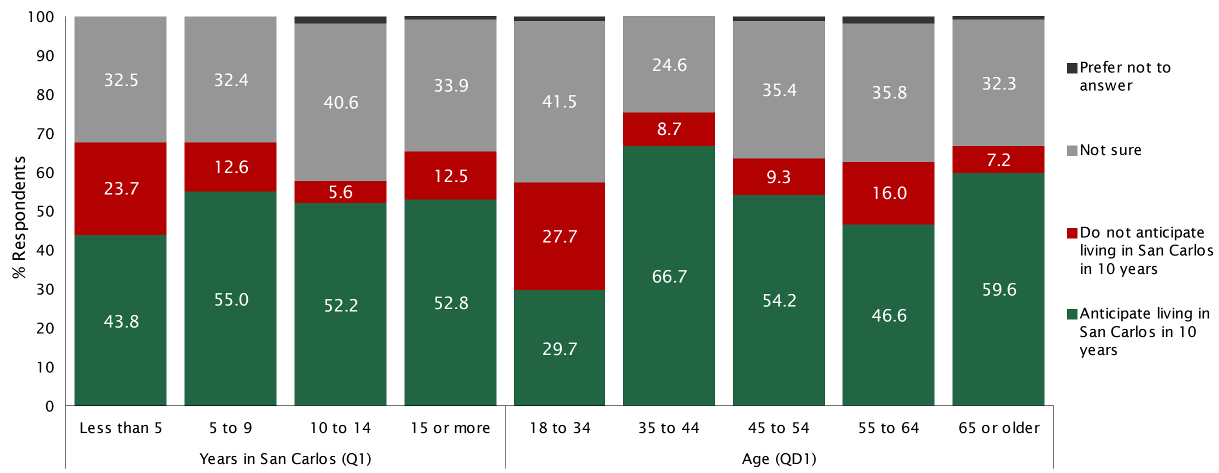


FIGURE 5 ANTICIPATE LIVING IN SAN CARLOS 10 YEARS FROM NOW BY ENGAGED CONNECTED WITH COMMUNITY, HSLD MEMBERS & PARTICIPATE, BELONG TO COMMUNITY

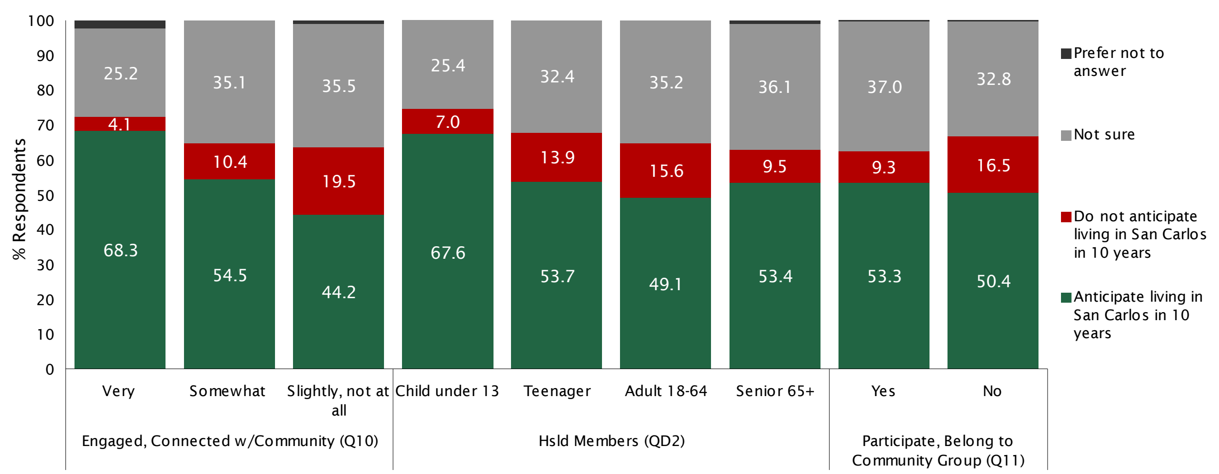
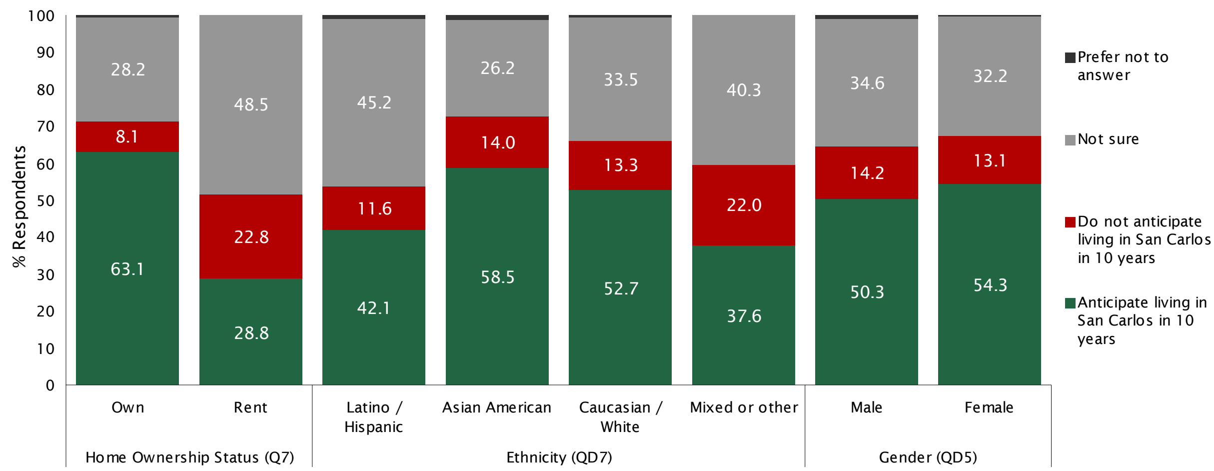


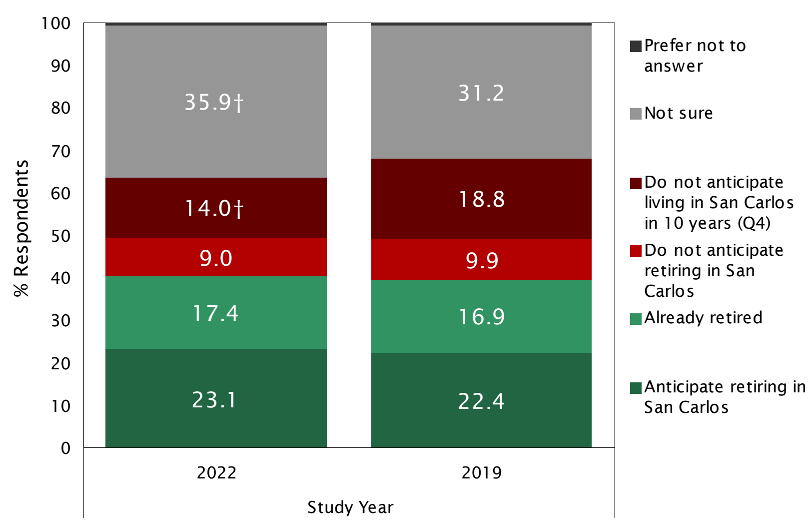
FIGURE 6 ANTICIPATE LIVING IN SAN CARLOS 10 YEARS FROM NOW BY HOME OWNERSHIP STATUS, ETHNICITY & GENDER



Along the same lines as Question 4, Question 5 asked respondents whether they anticipate remaining in San Carlos once they are retired. As shown in Figure 7, 41% of all residents surveyed either anticipated retiring in San Carlos (23%) or were already in retirement (17%). An additional 23% did not anticipate retiring in San Carlos (9%) or living in the City in 10 years (14%), whereas the remaining 36% were unsure or unwilling to share their retirement plans. The percentage who were unsure about their retirement plans increased significantly between 2019 and 2022.

Question 5 *Once you are retired, do you anticipate still living in San Carlos?*

FIGURE 7 ANTICIPATE LIVING IN SAN CARLOS WHEN RETIRED BY STUDY YEAR



For the interested reader, figures 8 through 10 examine the responses to Question 5 by years in San Carlos, age, engaged/connected with community, ages of household members, participate/belong to community group, home ownership status, ethnicity, and gender. Of note is the strong, positive relationship between length of residence, age, presence of a senior in the home, home ownership, and planning to remain in the City for retirement.

FIGURE 8 ANTICIPATE LIVING IN SAN CARLOS WHEN RETIRED BY YEARS IN SAN CARLOS & AGE

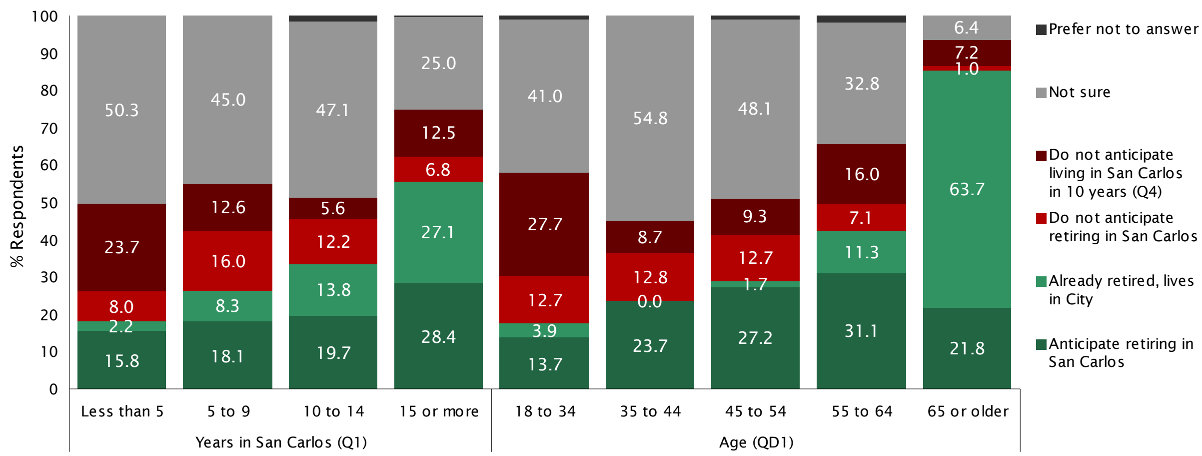


FIGURE 9 ANTICIPATE LIVING IN SAN CARLOS WHEN RETIRED BY ENGAGED, CONNECTED WITH COMMUNITY, HSLD MEMBERS & PARTICIPATED, BELONG TO COMMUNITY GROUP

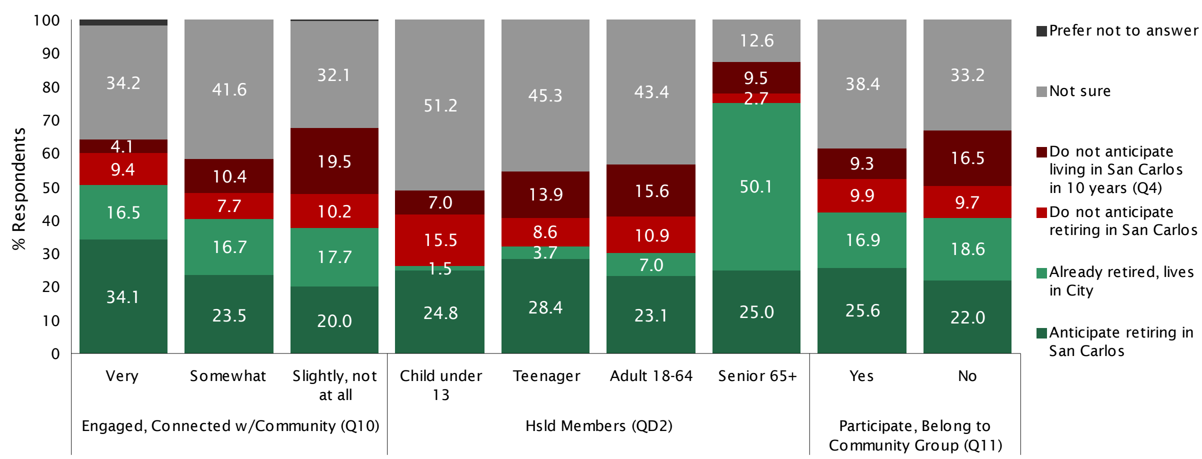
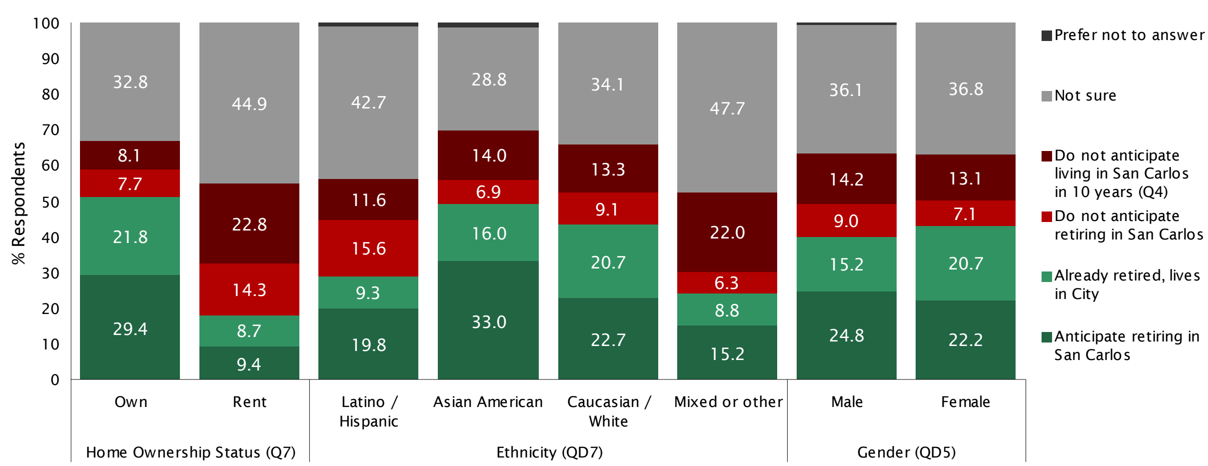


FIGURE 10 ANTICIPATE LIVING IN SAN CARLOS WHEN RETIRED BY HOME OWNERSHIP STATUS, ETHNICITY & GENDER



LENGTH OF RESIDENCE The survey also asked a number of questions to profile residents' living situation and current housing. The first such question asked residents how long they have lived in San Carlos. As shown in Figure 11, the majority of San Carlos residents have lived in the City 15 years or longer (52%), whereas one-in-five are newer residents that have lived in the City less than 1 year (4%) or 1 to 4 years (18%). An additional 14% have resided in San Carlos for 5 to 9 years and 13% have lived in the City between 10 and 14 years. The percentage of long-time residents (15+ years) in the 2022 survey was significantly lower than in 2019, whereas the percentage of new residents (less than one year) increased. Long-time San Carlos residents were most likely to be 55 years and older, Caucasian/White, and home owners (see Figure 12).

Question 1 *How long have you lived in San Carlos?*

FIGURE 11 YEARS IN SAN CARLOS BY STUDY YEAR

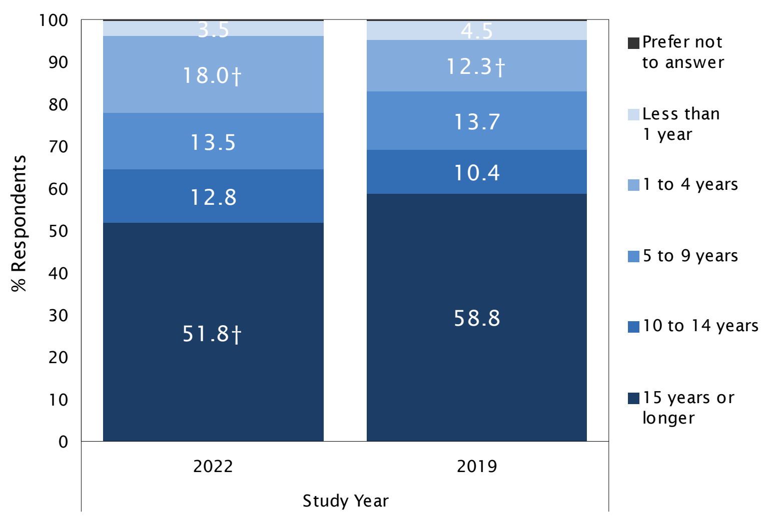
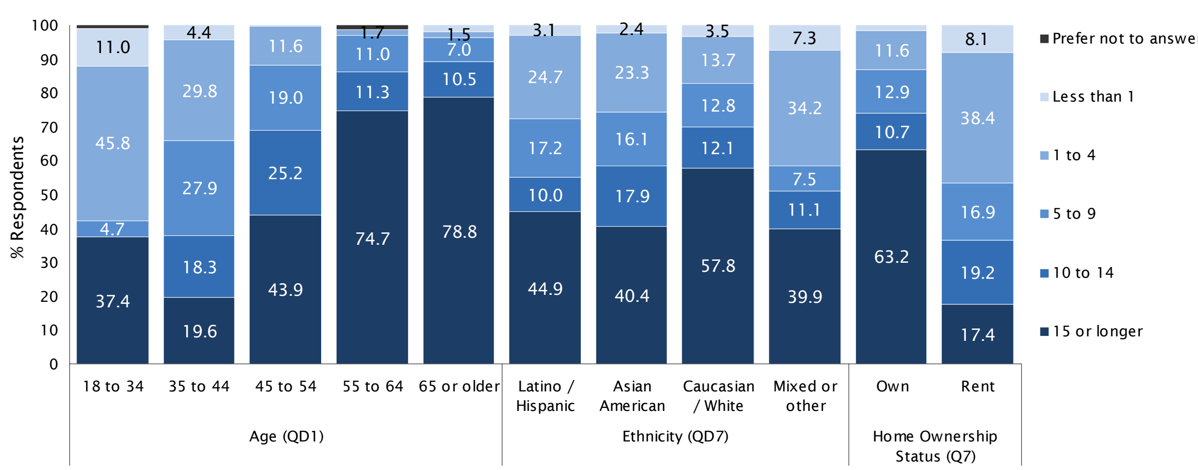


FIGURE 12 YEARS IN SAN CARLOS BY AGE, ETHNICITY & HOME OWNERSHIP STATUS



HOUSING TYPE Approximately three-quarters of San Carlos residents surveyed in 2022 live in a detached, single-family home (75%), whereas 13% live in an apartment, 6% a condominium, 4% a townhome, and 2% live in some other type of residence or preferred to not answer the question. These figures are nearly identical to the percentages recorded in 2019 (Figure 13). Figures 14 and 15 display respondents' type of residence by years in San Carlos, age, engaged/connected with community, ages of household members, and ethnicity. Newer residents (less than 5 years), those 18 to 34 years of age, residents less than *very* engaged in the community, those without a child or teen in the household, and respondents who reported mixed/other ethnicities were the most likely to live in a housing type other than a detached, single-family residence.

Question 6 *Which of the following best describes your residence in San Carlos? Read list.*

FIGURE 13 TYPE OF RESIDENCE BY STUDY YEAR

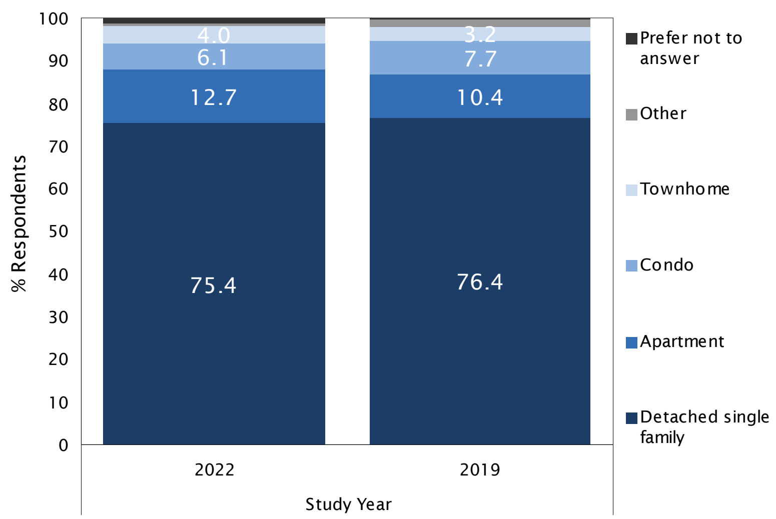


FIGURE 14 TYPE OF RESIDENCE BY YEARS IN SAN CARLOS & AGE

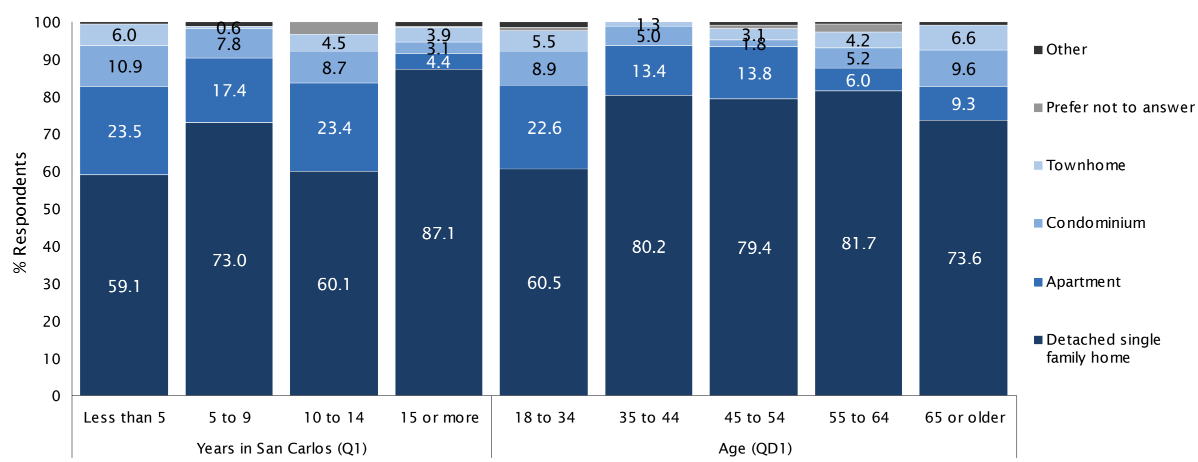
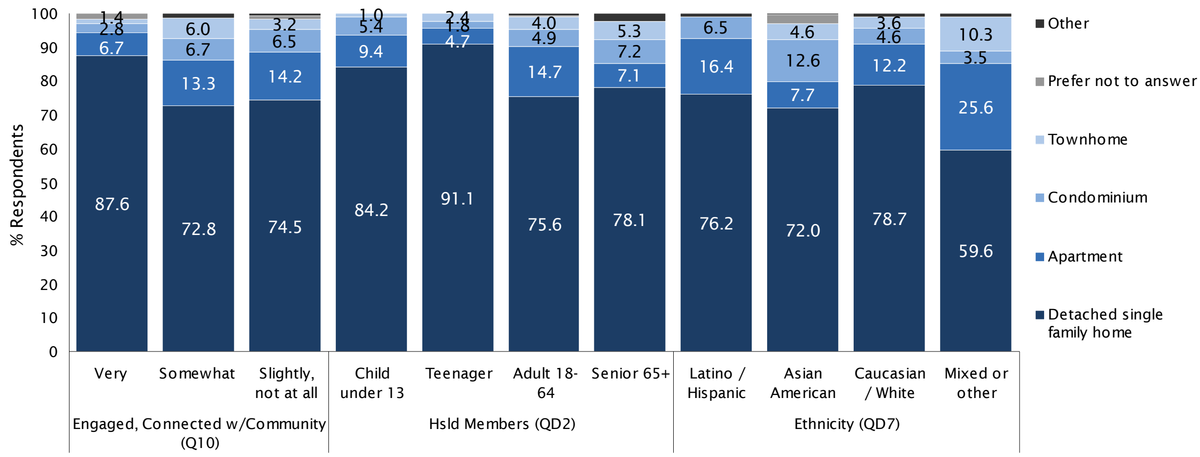


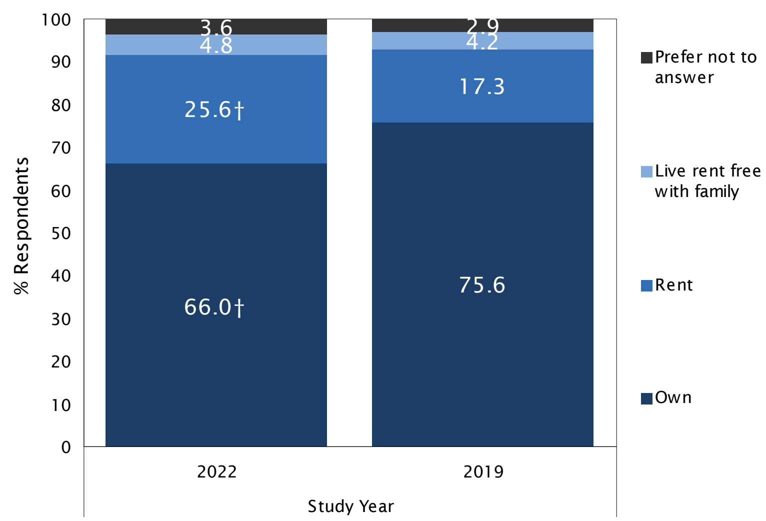
FIGURE 15 TYPE OF RESIDENCE BY ENGAGED, CONNECTED WITH COMMUNITY, HSLD MEMBERS & ETHNICITY



HOME OWNERSHIP STATUS As shown in Figure 16, the vast majority of San Carlos residents surveyed in 2022 own their home (66%). The remainder either rent (26%), live rent free with family (5%), or were unwilling to state (4%).[4] Figures 17 and 18 on the next page examine home ownership status by a host of respondent characteristics. Strong, positive relationships exist between home ownership status and years in San Carlos, age of respondent, and being engaged/connected with the San Carlos community.

Question 7 *Do you own or rent your residence in San Carlos?*

FIGURE 16 HOME OWNERSHIP STATUS BY STUDY YEAR



4. Factoring out the 'live rent free with family' and prefer not to answer responses (which aren't options on the US Census) and recalculating the percentages results in a homeownership rate of 72%, which is consistent with US Census estimates for San Carlos.

FIGURE 17 HOME OWNERSHIP STATUS BY YEARS IN SAN CARLOS, AGE & TYPE OF RESIDENCE

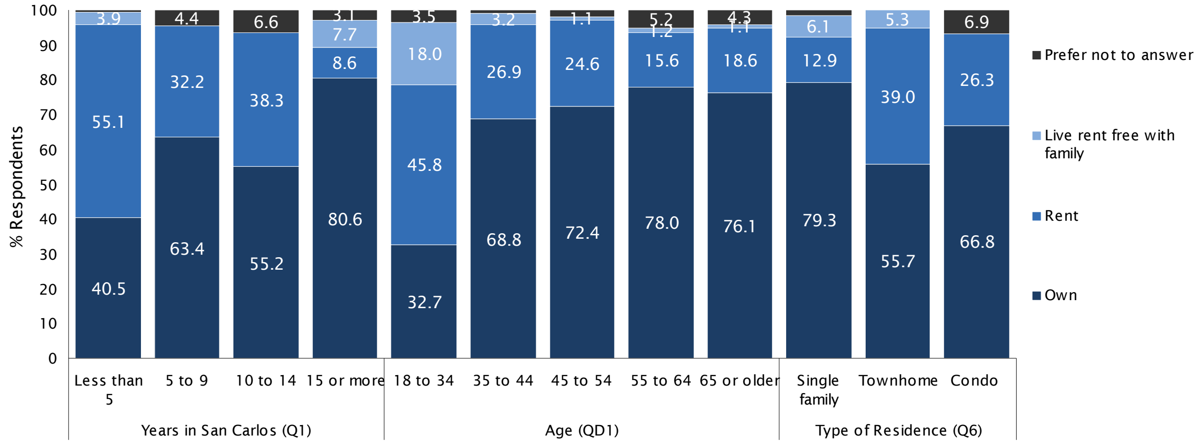
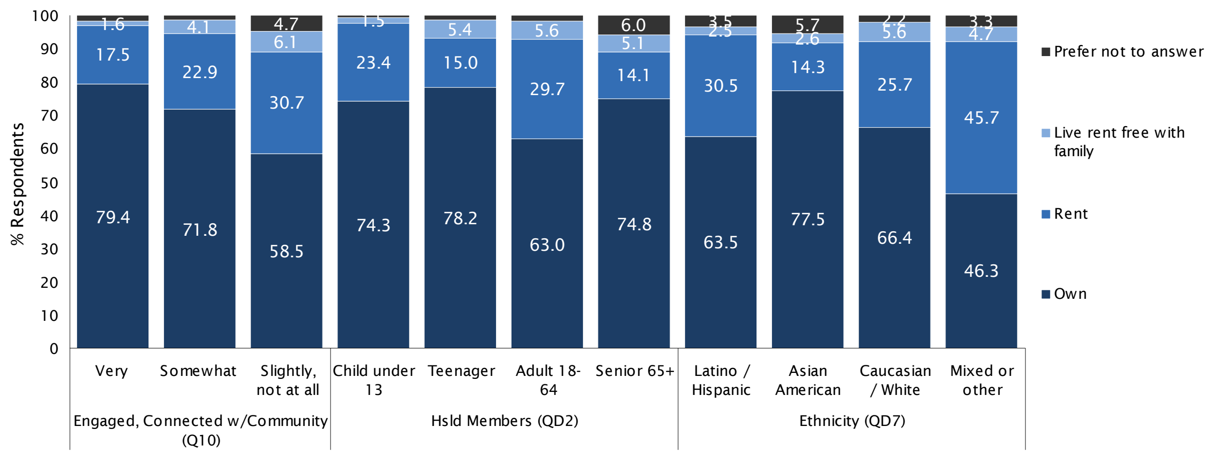


FIGURE 18 HOME OWNERSHIP STATUS BY ENGAGED, CONNECTED WITH COMMUNITY, HSLD MEMBERS & ETHNICITY



PLAN TO BUILD ACCESSORY DWELLING UNIT Home owners who live in a detached, single-family home were next asked if they plan to build an accessory dwelling unit (ADU), or granny flat, on their San Carlos property in the next five years. As shown in Figure 19 on the next page, eight percent of single-family home owners answered Question 8 in the affirmative and plan to build an ADU. Three-quarters of respondents (75%) do not have any plans to build an accessory dwelling unit in the next five years, whereas 17% were unsure or unwilling to share. When compared to 2019, the percentage who were unsure about their ADU plans increased significantly, which corresponded to a decline in those who did not plan to build an ADU.

Newer residents (less than five years), those with a child or teenager in their household, and respondents under 35 years of age were the most likely single-family home owner subgroups to have plans to build an accessory dwelling unit on their property (see Figure 20 on next page).

Question 8 *In the next five years, do you plan to build an accessory dwelling unit - also known as a granny flat - on your property in San Carlos?*

FIGURE 19 BUILD AN ACCESSORY DWELLING UNIT IN NEXT 5 YEARS (AMONG SINGLE-FAMILY HOME OWNERS) BY STUDY YEAR

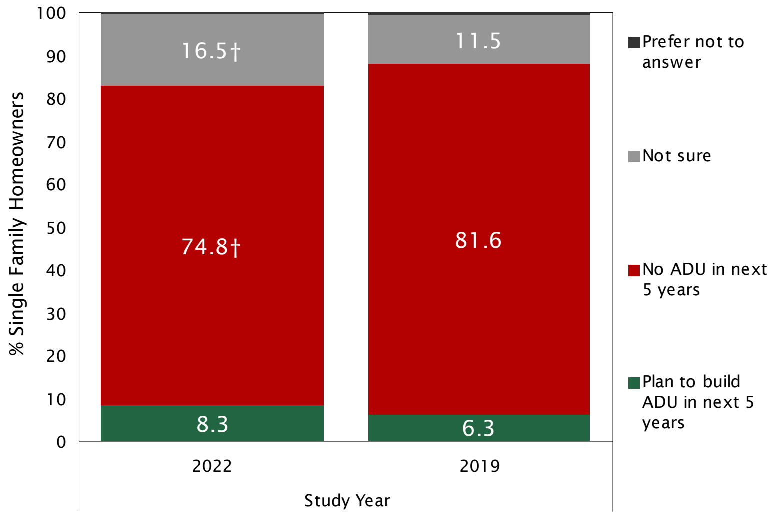
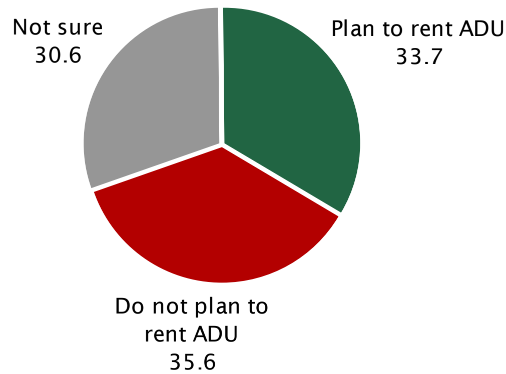


FIGURE 20 BUILD AN ACCESSORY DWELLING UNIT IN NEXT 5 YEARS (AMONG SINGLE-FAMILY HOME OWNERS) BY YEARS IN SAN CARLOS, HSLD MEMBERS & AGE

DO YOU PLAN TO RENT THE ADU? The final question in this series (Question 9) was directed to home owners who planned to build an ADU on their property and simply asked whether they plan to rent the ADU for supplemental income. Overall, one-third (34%) of San Carlos residents who plan to build an ADU also plan to rent it for supplemental income (see Figure 21 on the next page), whereas the remainder either do not plan to rent the unit for income (36%) or were unsure of their plans (31%).

Question 9 *Do you plan to rent the accessory dwelling unit for supplemental income?*

FIGURE 21 PLAN TO RENT THE ACCESSORY DWELLING UNIT FOR SUPPLEMENTAL INCOME



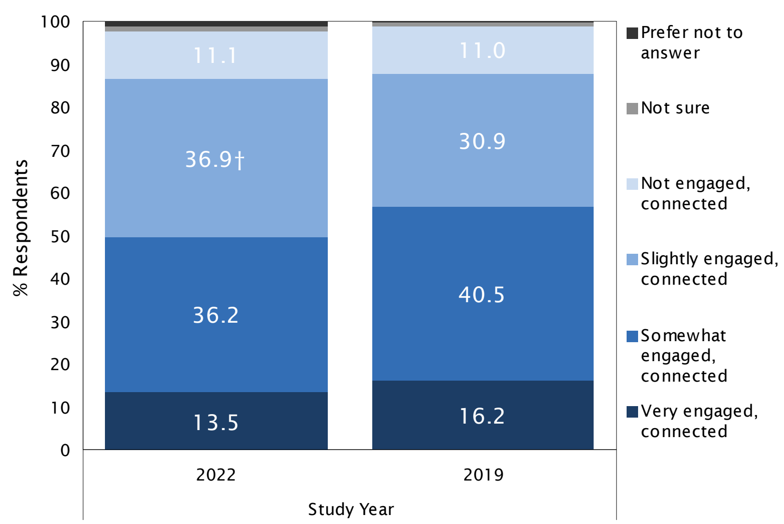
COMMUNITY CONNECTIONS

After assessing housing characteristics and perceptions about life in San Carlos, the survey transitioned to examining how connected San Carlos residents are with their local community, including whether they belong to community groups and how well they know their neighbors.

FEEL ENGAGED & CONNECTED TO COMMUNITY The first question in this section asked respondents to rate how engaged and connected they feel to their local San Carlos community using a scale of very, somewhat, slightly, or not at all engaged and connected. Overall, 14% of respondents described themselves as very engaged and connected to the community in 2022, 36% were somewhat engaged and connected, and 37% slightly engaged and connected. Another 11% of respondents confided that they do not feel at all engaged or connected to the San Carlos community. When compared to 2019—prior to pandemic—the levels of engagement and feelings of connectivity among San Carlos residents declined somewhat (see Figure 22).

Question 10 *In general, how engaged and connected do you feel to your San Carlos community? Would you say very, somewhat, slightly, or not at all engaged and connected?*

FIGURE 22 ENGAGED, CONNECTED WITH SAN CARLOS COMMUNITY BY STUDY YEAR



For the interested reader, figures 23 through 26 on the following pages show how feelings of community connectedness varied by a number of demographic characteristics. Several subgroups stood out for having a substantially higher percentage of respondents who feel *very* connected to the community, including those who had lived in San Carlos between 10 and 14 years, single family home owners, homemakers, those with a child or teenager in the home, residents between 45 and 54 years of age, and especially those who belong to a community group.

FIGURE 23 ENGAGED, CONNECTED WITH SAN CARLOS COMMUNITY BY YEARS IN SAN CARLOS & TYPE OF RESIDENCE

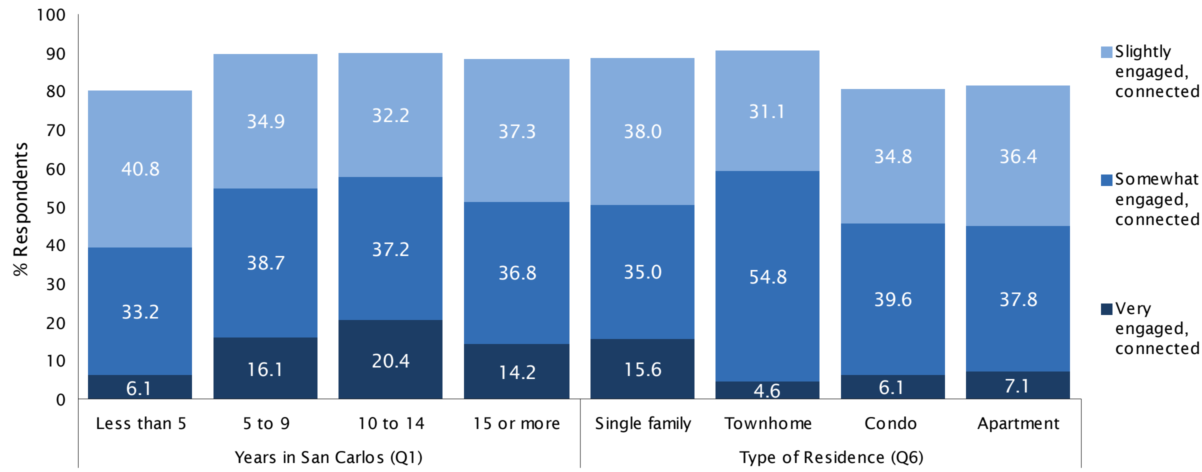


FIGURE 24 ENGAGED, CONNECTED WITH SAN CARLOS COMMUNITY BY EMPLOYMENT STATUS & HSLD MEMBERS

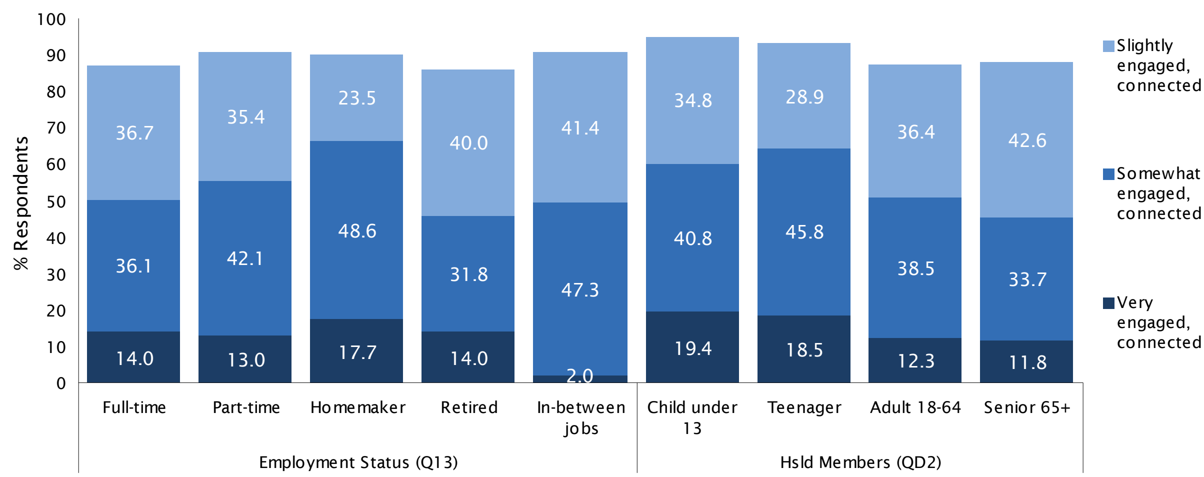


FIGURE 25 ENGAGED, CONNECTED WITH SAN CARLOS COMMUNITY BY AGE & ETHNICITY

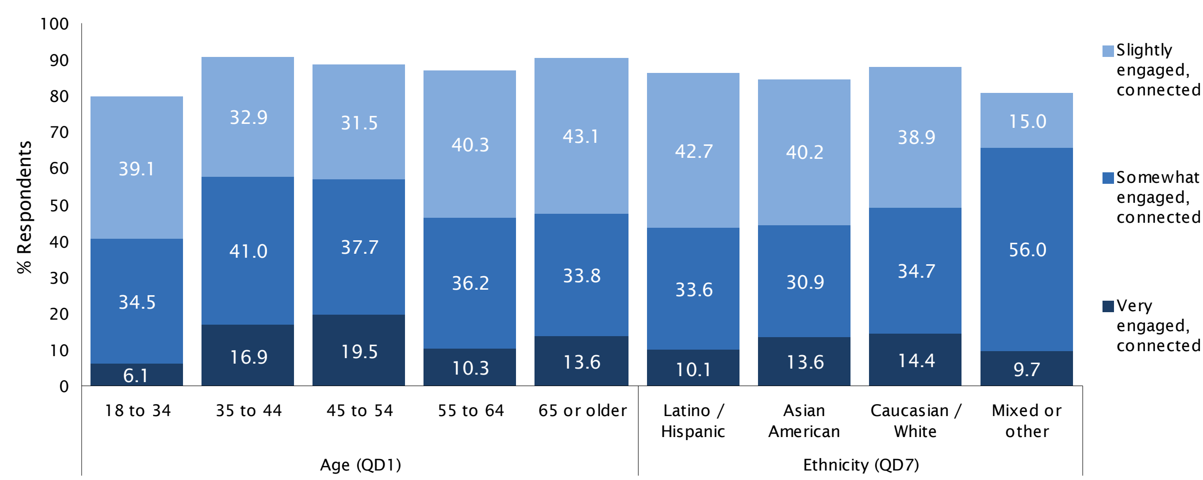
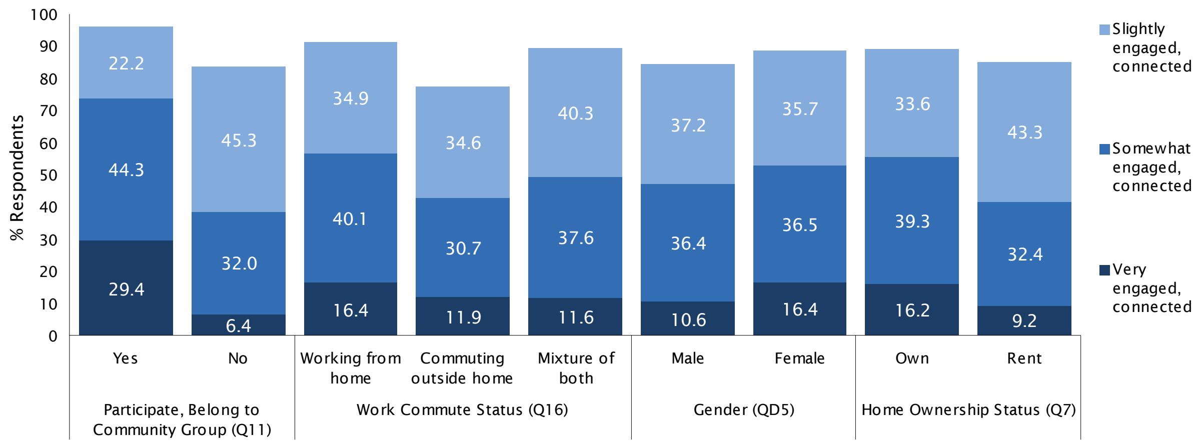


Figure 26 Engaged, Connected With San Carlos Community by Participate, Belong to Community Group, Work Community Status & Gender



BELONG TO COMMUNITY GROUP The next question asked respondents whether they belong to any organized community groups in San Carlos. Three-in-ten respondents (29%) belonged to an organized community group in the City, whereas 63% did not and the remainder were either unsure or unwilling to state (Figure 27). Residents who have lived in San Carlos between five and 14 years, those living in a housing type other than a condominium, homemakers, respondents with children and/or teenagers in their household, residents 35 to 54 years of age, residents very engaged and connected with the community, and those who work from home were the most likely subgroups to belong to an organized community group (see figures 28-31).

Question 11 *Do you currently participate in or belong to any organized community groups in San Carlos?*

Figure 27 Participate in or Belong to Organized Community Group by Study Year

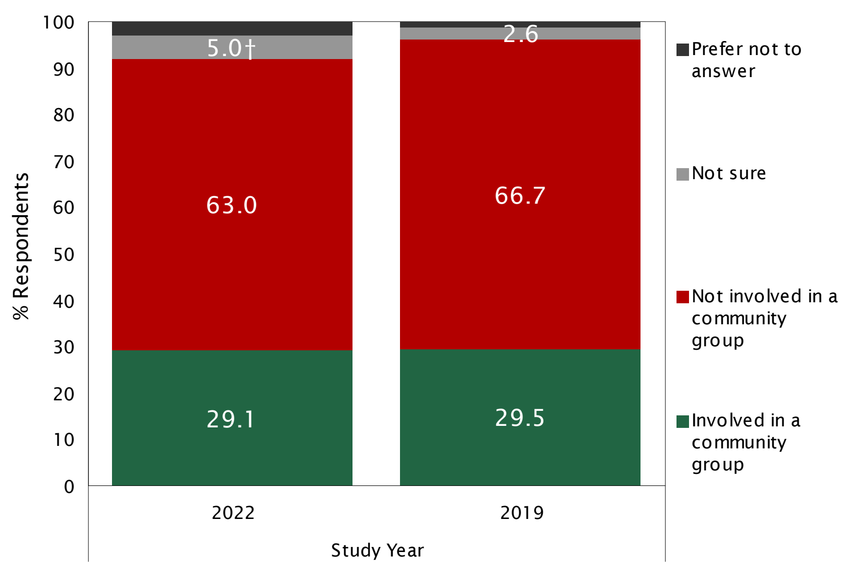


FIGURE 28 PARTICIPATE IN OR BELONG TO ORGANIZED COMMUNITY GROUP BY YEARS IN SAN CARLOS & TYPE OF RESIDENCE

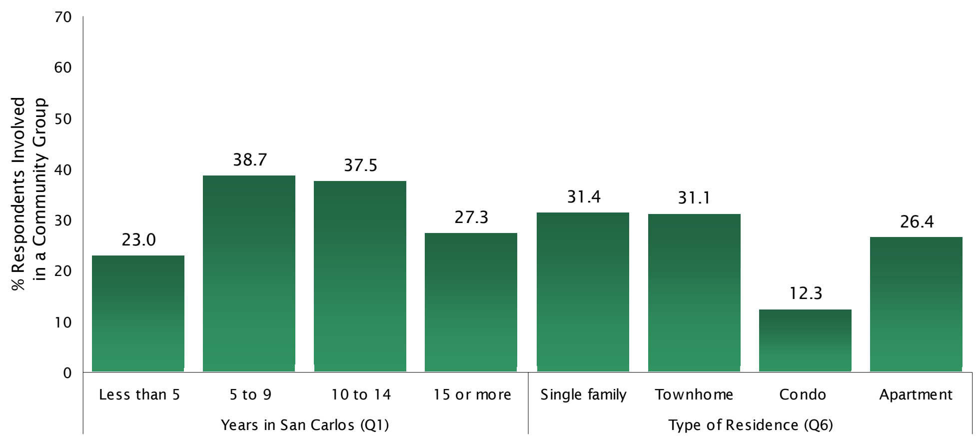


FIGURE 29 PARTICIPATE IN OR BELONG TO ORGANIZED COMMUNITY GROUP BY EMPLOYMENT STATUS & HSLD MEMBERS

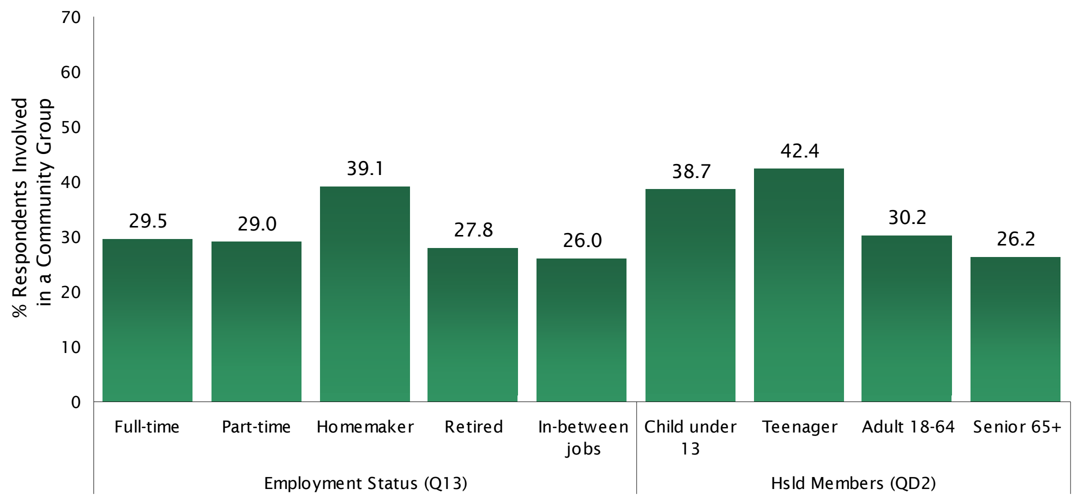


FIGURE 30 PARTICIPATE IN OR BELONG TO ORGANIZED COMMUNITY GROUP BY AGE & ETHNICITY

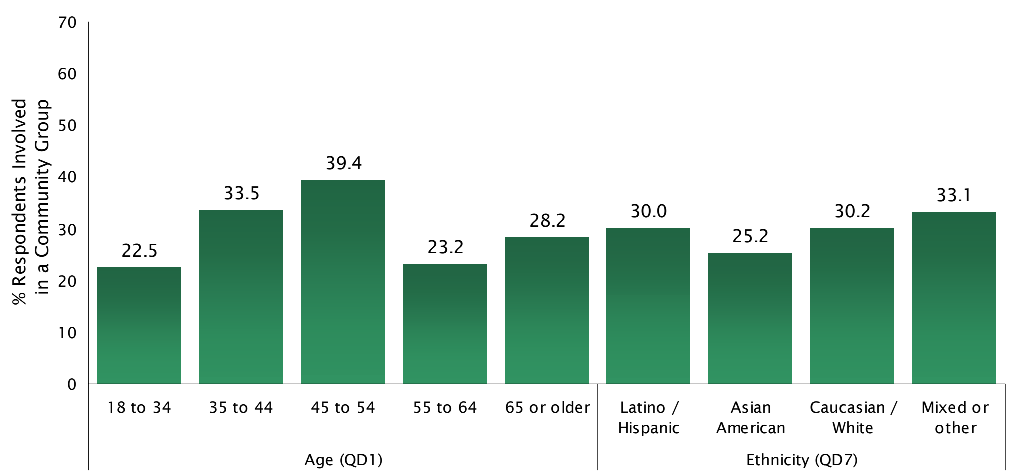
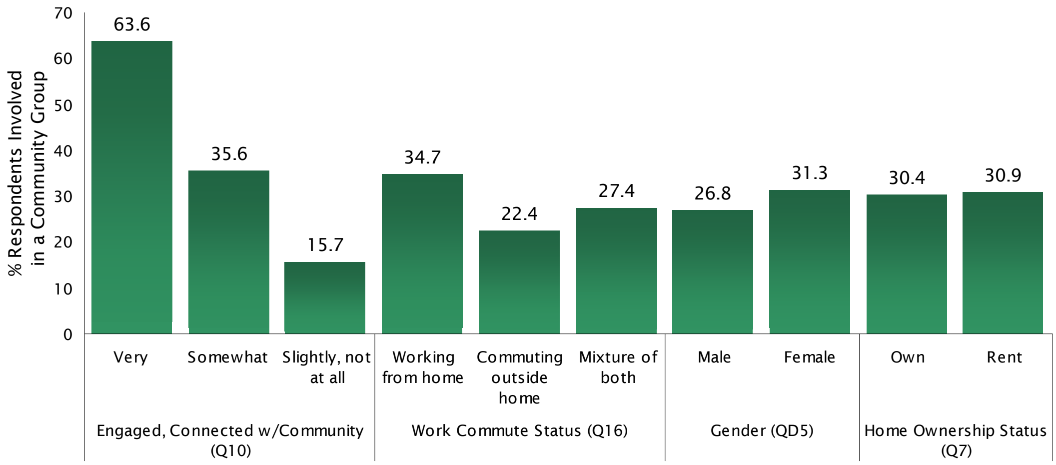


FIGURE 31 PARTICIPATE IN OR BELONG TO ORGANIZED COMMUNITY GROUP BY ENGAGED CONNECTED WITH COMMUNITY, GENDER & HOME OWNERSHIP STATUS



FAMILIARITY WITH NEIGHBORS The last question in this section asked respondents to describe how well they know their neighbors that live close by (Figure 32). Overall, 5% of residents revealed that they know all the neighbors who live close to them well, 24% know most of their neighbors well, 55% know some of them well, and 15% confided that they do not know any of their neighbors well. When compared to right before the pandemic started (2019), the percentage of San Carlos residents in 2022 who indicated they know most of their neighbors well declined significantly, while the percentage who know none of their neighbors well increased significantly. Figures 33 through 36 show how San Carlos residents' familiarity with their neighbors varied by demographic characteristics and subgroups. Long-time residents (15+ years), those living in single family homes, residents 55 to 64 years of age, homeowners, and those who indicated they are very connected to the community were the most likely to report that they know all or most of their neighbors.

Question 12 *Thinking of the neighbors that live close to you in San Carlos, what proportion do you know well? All, most, some, or none?*

FIGURE 32 FAMILIARITY WITH NEIGHBORS BY STUDY YEAR

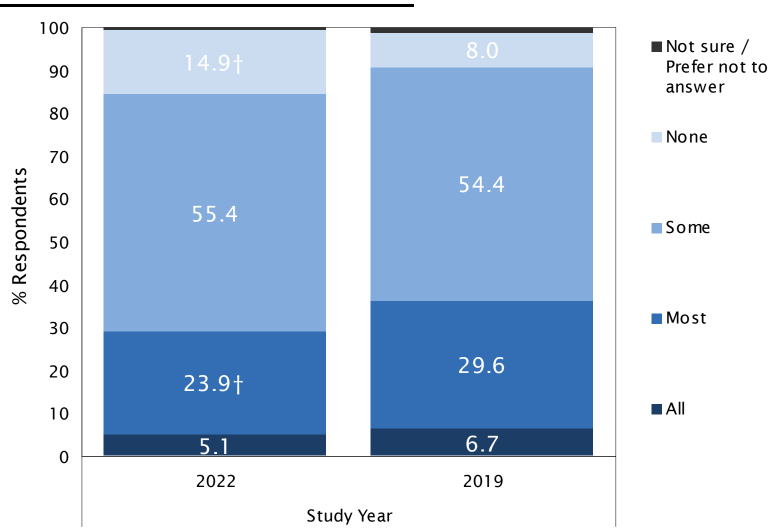


Figure 33 Familiarity With Neighbors by Years in San Carlos & Type of Residence

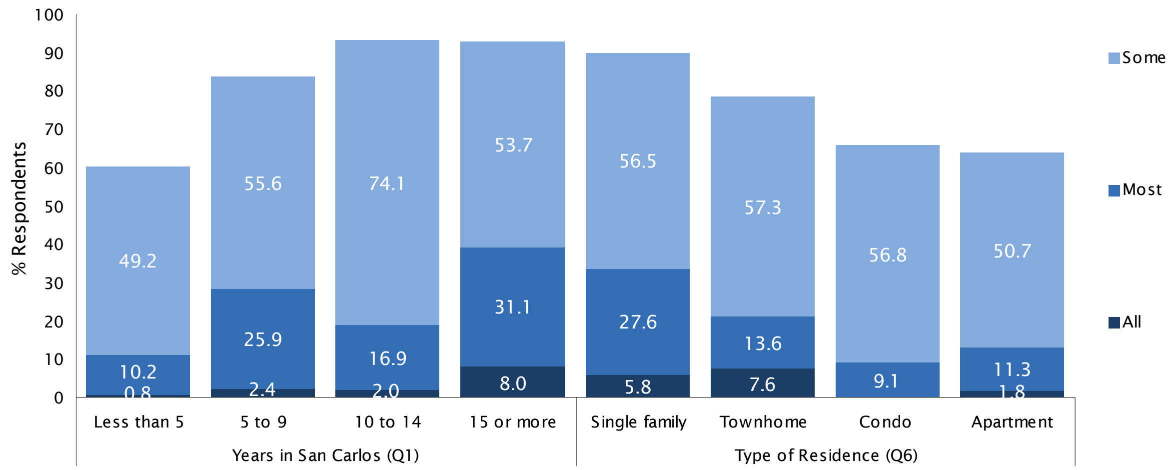


Figure 34 Familiarity With Neighbors by Employment Status & Hsld Members

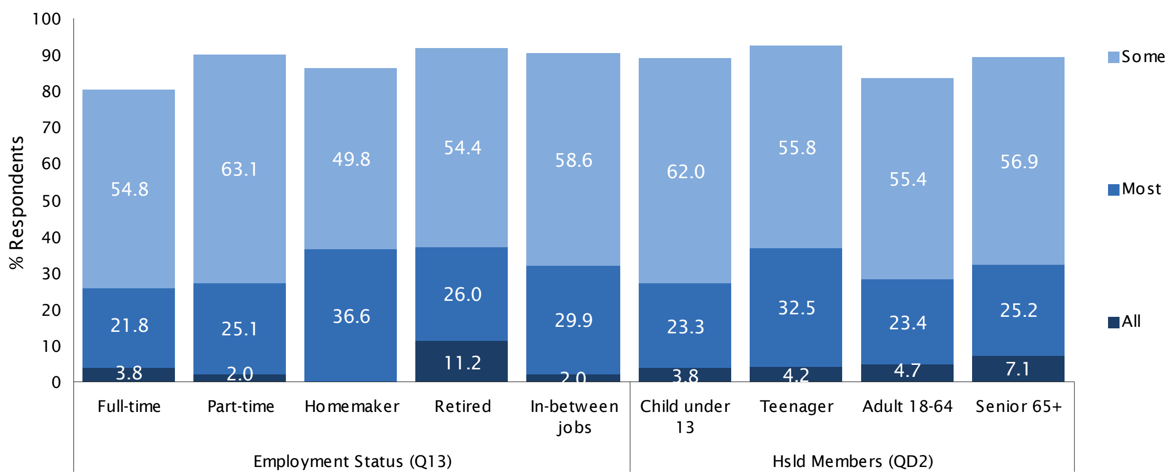


Figure 35 Familiarity With Neighbors by Age & Ethnicity

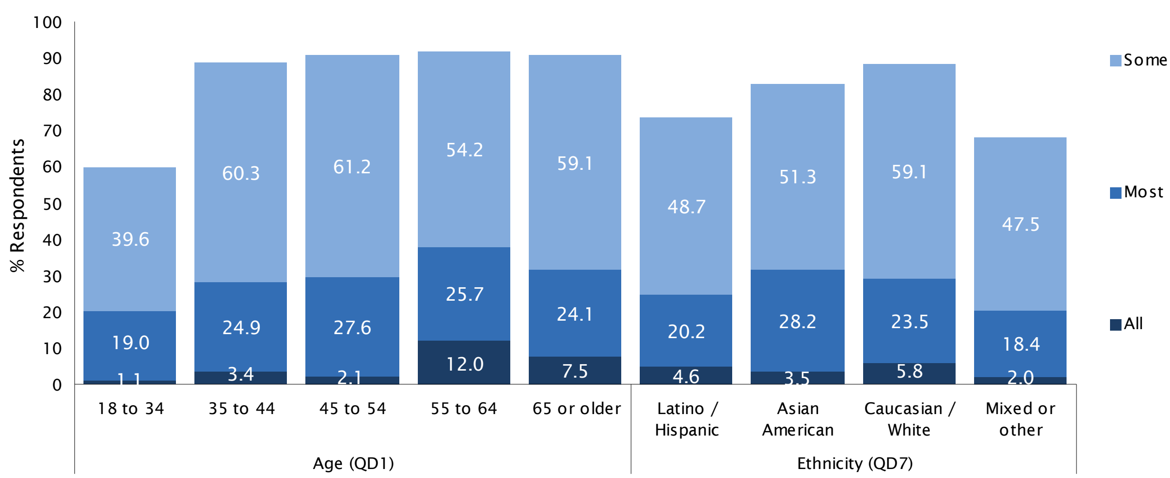
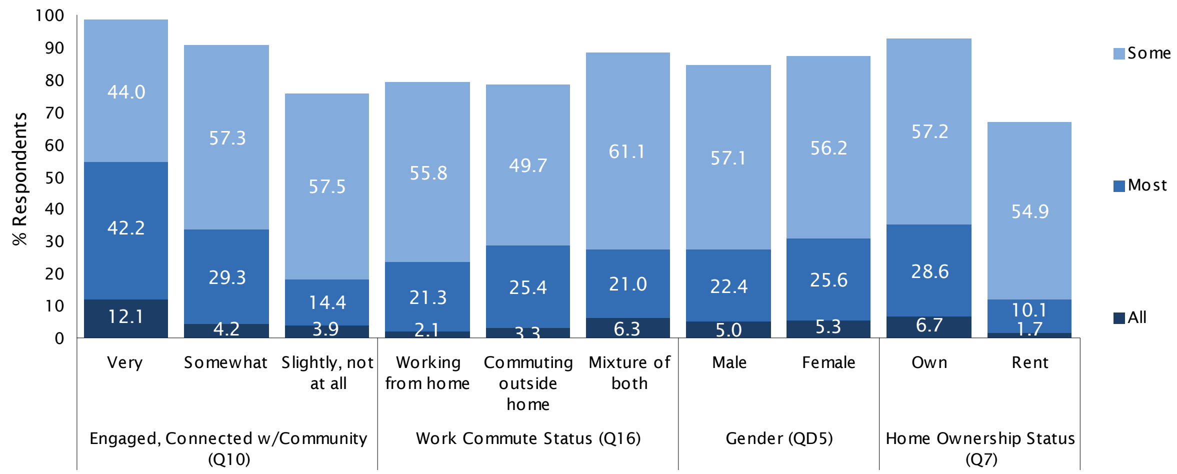


FIGURE 36 FAMILIARITY WITH NEIGHBORS BY ENGAGED, CONNECTED WITH COMMUNITY, WORK COMMUTE STATUS, GENDER & HOME OWNERSHIP STATUS



EMPLOYMENT, COMMUTE & TRANSPORTATION

The next section of the survey was designed to identify residents' employment and travel behaviors and gather specific information about their commute—including primary mode, commute distance, and duration.

EMPLOYMENT STATUS The opening question in this series presented respondents with six different employment categories and asked them to select the one that best matched their employment status. As shown in Figure 37 below, approximately seven-in-ten respondents in 2022 indicated that they are employed either full-time (61%) or part-time (9%), 21% selected retired, 3% homemaker, 3% student, 2% are in-between jobs, and 2% were unsure or unwilling to state. Figures 38 and 39 show how employment status differed across demographic subgroups.

Question 13 *Which of the following best describes your employment status?*

FIGURE 37 EMPLOYMENT STATUS BY STUDY YEAR

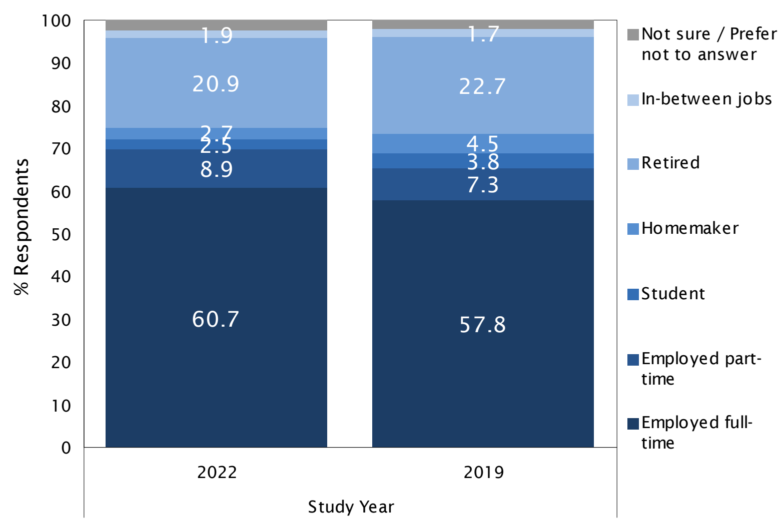


FIGURE 38 EMPLOYMENT STATUS BY AGE & ETHNICITY

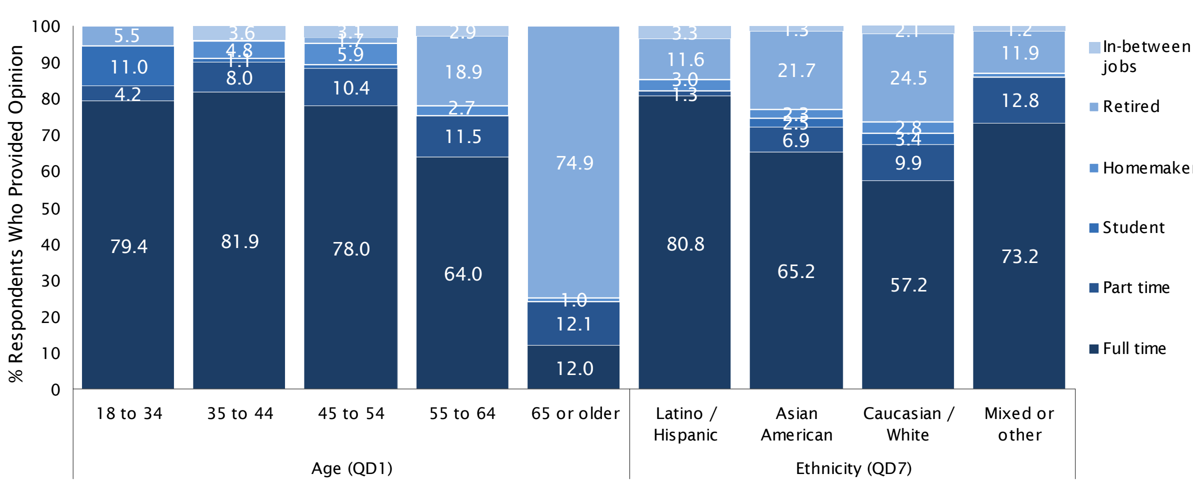
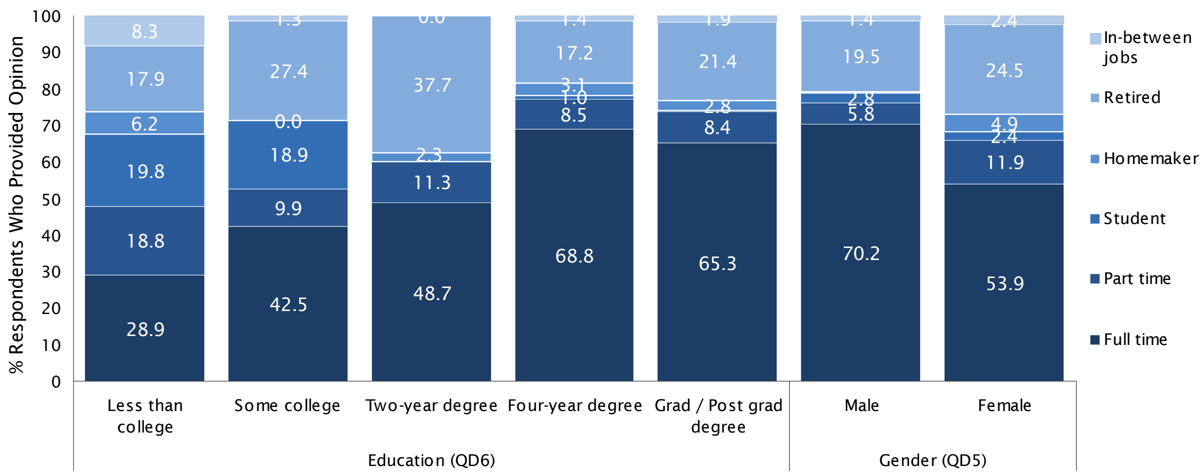


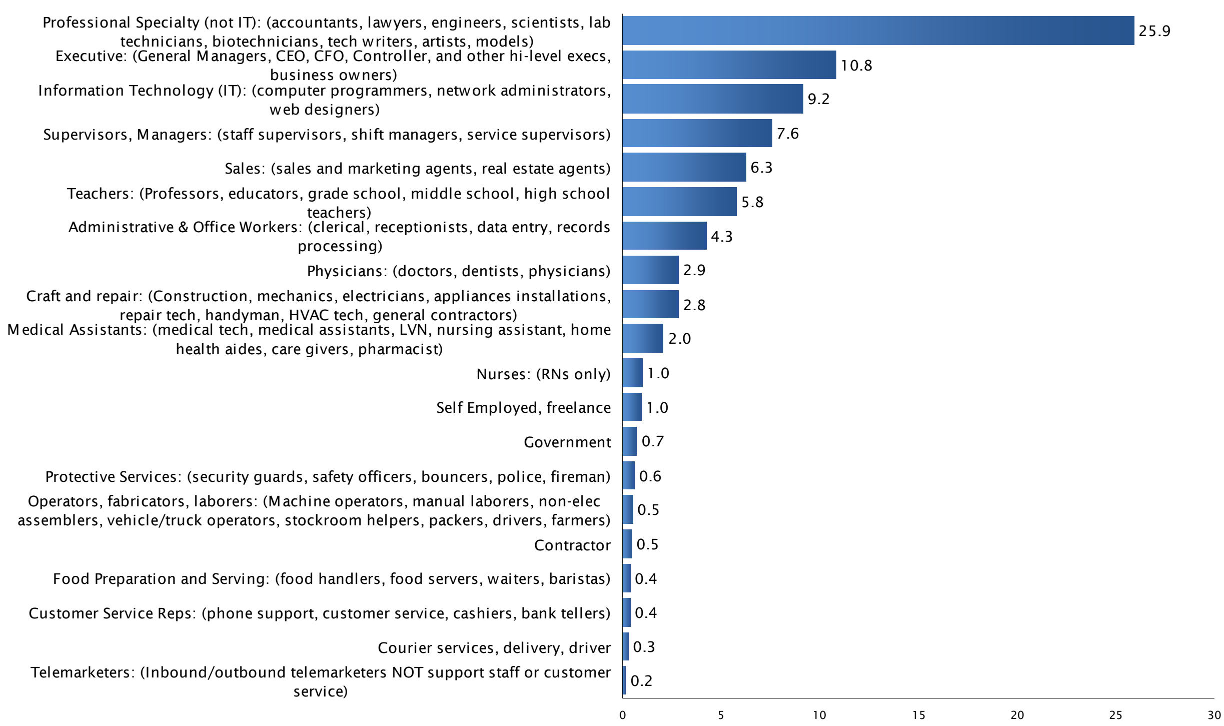
FIGURE 39 EMPLOYMENT STATUS BY EDUCATION & GENDER



OCCUPATION & INDUSTRY The next two questions asked employed residents to describe their occupation (Question 14) and industry (Question 15). These questions were asked in an open-ended manner, allowing respondents to provide specifics without being limited to a list of options. True North later reviewed the verbatim responses and grouped them into the broader categories shown in the figures, which also provide examples of each category in parentheses.

Question 14 *What is your current occupation?*

FIGURE 40 OCCUPATION

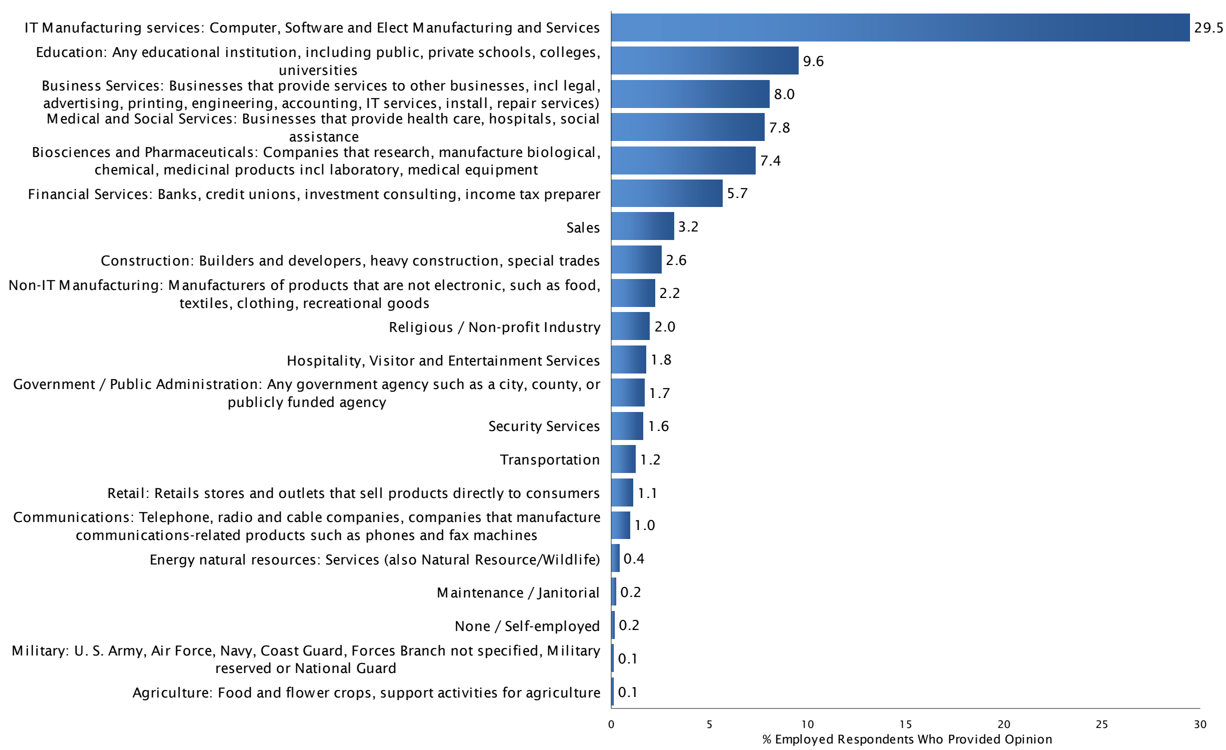


As shown in Figure 40 on the previous page, San Carlos residents work across a wide variety of occupational categories. Overall, 26% of employed residents who provided an opinion indicated that their current occupation falls within the professional specialty category such as accountant, lawyer, engineer, scientist, or laboratory technician, 11% work in an executive occupation such as general manager, CEO, CFO, controller, or business owner, 9% work in an information technology position, 8% are supervisors or managers, 6% work in sales, 6% are teachers, and 4% are office or administrative workers. The remaining occupational categories were cited by less than 3% of respondents, respectively.

When asked to describe their *industry*, 30% of employed residents who provided an opinion indicated that they work in information technology manufacturing services, 10% work in education, 8% in business services, 8% work in medical and social services, 7% in biosciences or pharmaceuticals, and 6% work in the financial services industry. The remaining industry groupings were each cited by less than 5% of respondents (Figure 41).

Question 15 *And what industry do you work in? If pauses, ask: What does your company do?*

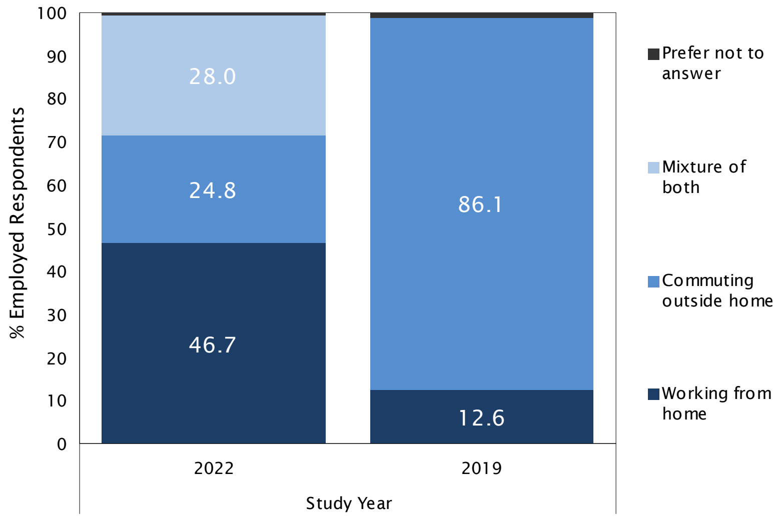
FIGURE 41 INDUSTRY



WORK LOCATION The survey also asked employed individuals whether they work from home, commute to a work location outside of their home, or a mixture of both. As shown in Figure 42 on the next page, nearly half of respondents in 2022 (47%) stated that they work from home, whereas 25% commute to a work location outside the home and 28% do a mixture of both. The 2022 findings are in stark contrast to the results found in the 2019 survey just prior to pandemic, when more than eight-in-ten employed San Carlos residents (86%) commuted to a work site outside of their home.

Question 16 *Are you currently working from home, commuting to a workplace outside of your home, or a mixture of both?*

Figure 42 Work Location by Study Year



Figures 43 through 45 show how work location among employed San Carlos residents varied by length of residence, how engaged they feel with the community, age, ethnicity, education, home ownership status, and gender.

Figure 43 Work Location by Years in San Carlos & Engaged, Connected With Community

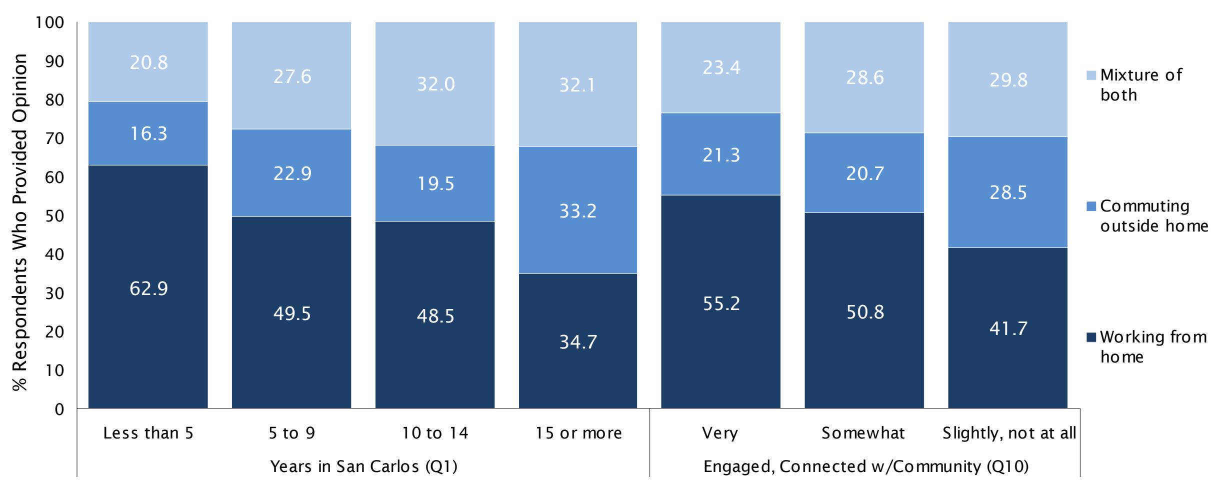


FIGURE 44 WORK LOCATION BY AGE & ETHNICITY

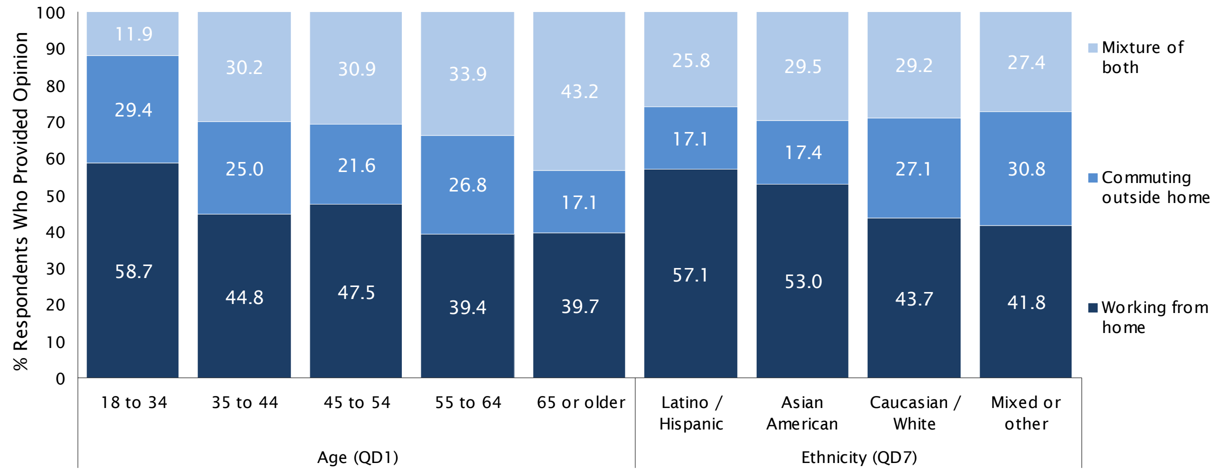
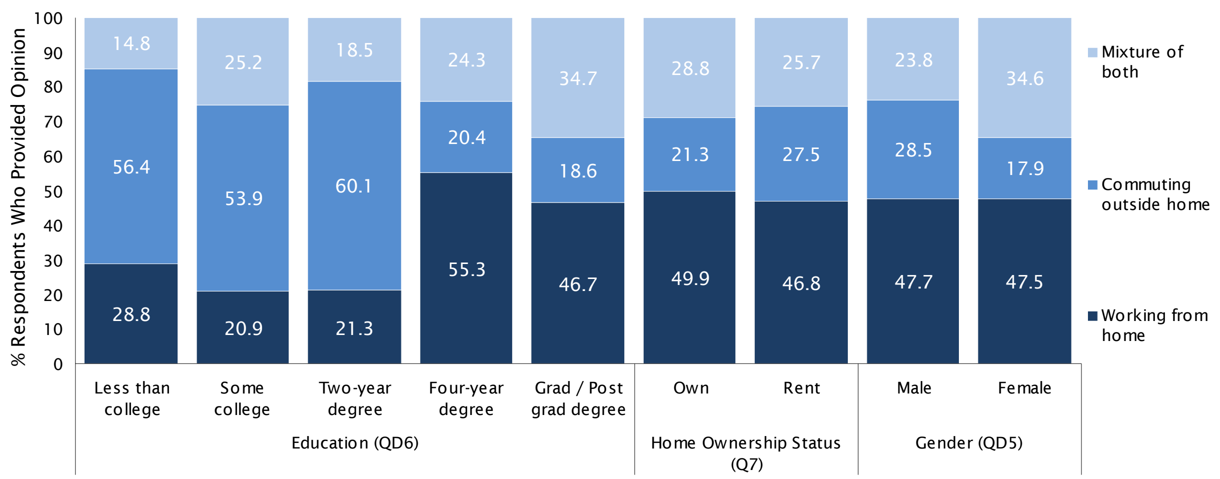


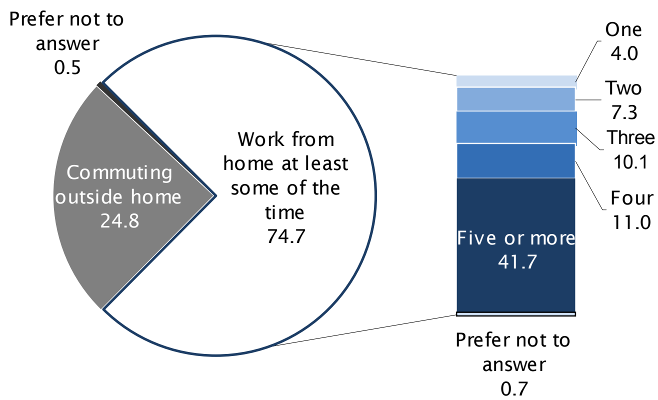
FIGURE 45 WORK LOCATION BY EDUCATION, HOME OWNERSHIP STATUS & GENDER



DAYS PER WEEK WORKING AT HOME Respondents who reported that they work from home at least occasionally were subsequently asked to report how many days they *primarily* work from home per week (see Figure 46 on the next page). Among the 75% of employees who work from home at least occasionally, most (42%) indicated that they primarily work from home five days per week, with the remainder reporting they do so four (11%), three (10%), two (7%) or one day per week (4%).

Question 17 *How many days do you primarily work from home each week?*

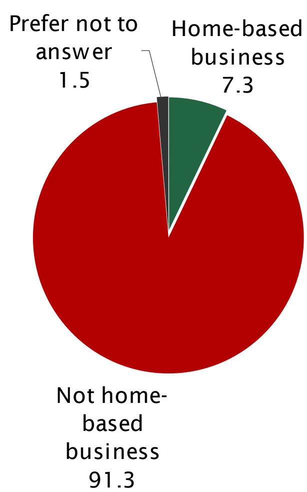
FIGURE 46 DAYS A WEEK WORKING FROM HOME



HOME-BASED BUSINESS Approximately 10% employed San Carlos residents who work from home own a home-based business, which translates to 7% of *all* employed residents owning a home based business in the City (Figure 47).

Question 18 *Do you own a home-based business?*

FIGURE 47 OWN A HOME-BASED BUSINESS AMONG ALL EMPLOYED RESPONDENTS



COMMUTE MODE Respondents who commute to a work destination outside of their home at least occasionally were subsequently asked to identify the method of transportation they use most often when commuting to their work place. Overall, the most common method of commuting was driving alone to work in a car, truck, SUV, or van (83%). Public transit via Caltrain (5%) or other public transit mode (1%) accounted for approximately 6% of commutes and ridesharing via carpool accounted for approximately 3% of commutes. Active transportation modes (biking, walking, jogging, running) were mentioned by 6% of employees as their primary method of commuting to work. All other modes were mentioned by just 1% of respondents, collectively. When compared to 2019, the percentage ridesharing or using transit for their work commutes declined in 2022, whereas the percentage engaging in active transportation increased. Figures 49 and 50 show how the percentage who commute by driving alone varied by age, ethnicity, commute duration, and commute distance.

Question 19 *What method of transportation do you use most of the time when commuting to your work place?*

FIGURE 48 PRIMARY WORK COMMUTE MODE BY STUDY YEAR

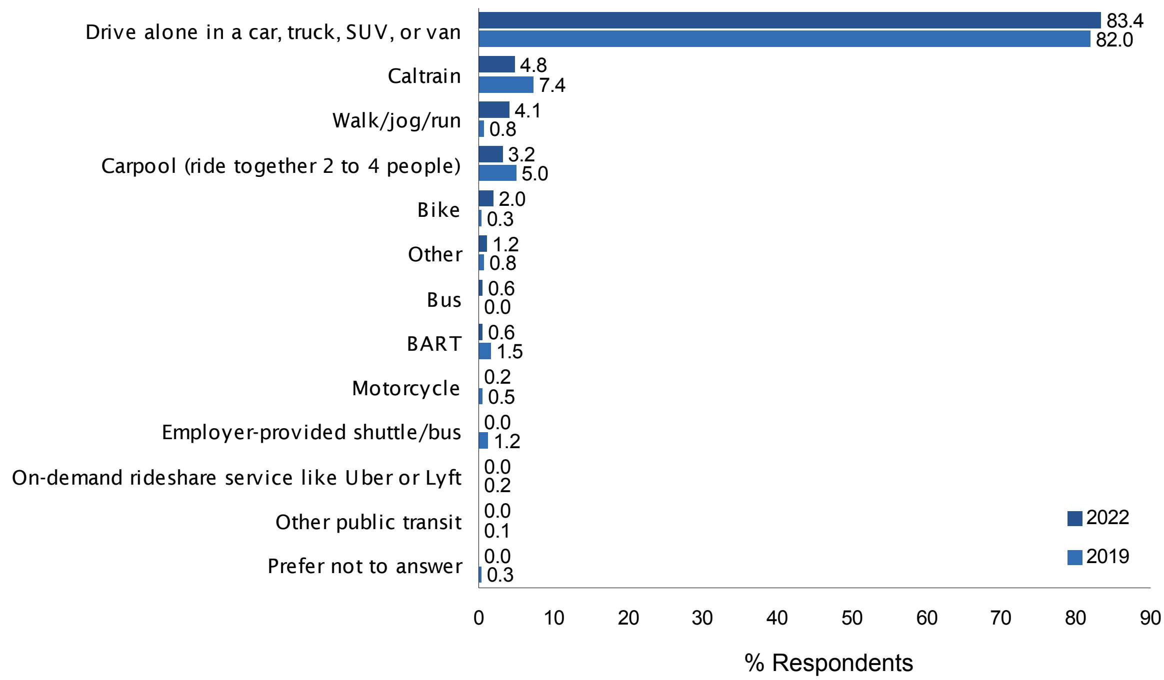


FIGURE 49 PRIMARY WORK COMMUTE MODE BY AGE & ETHNICITY

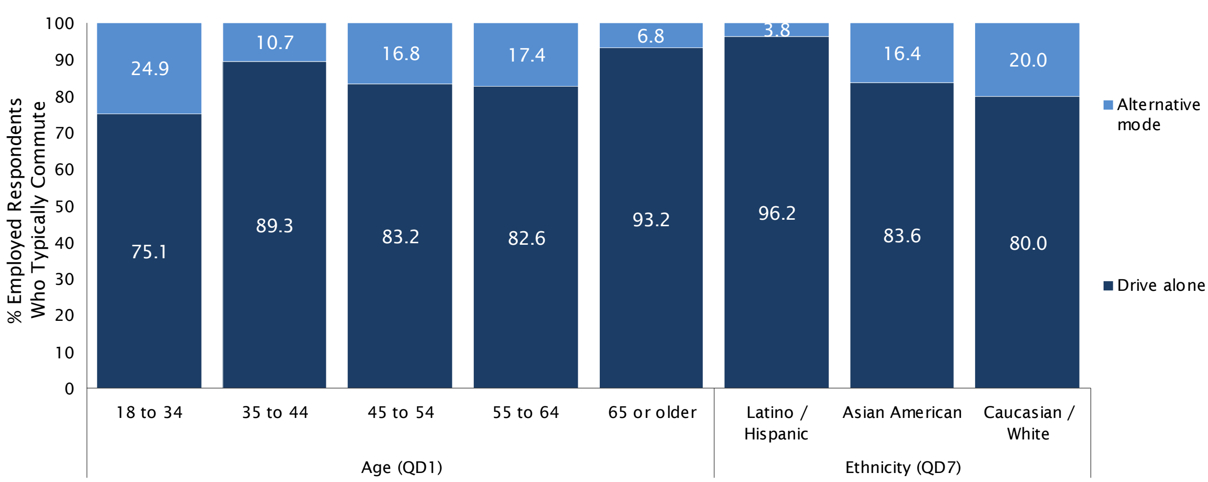
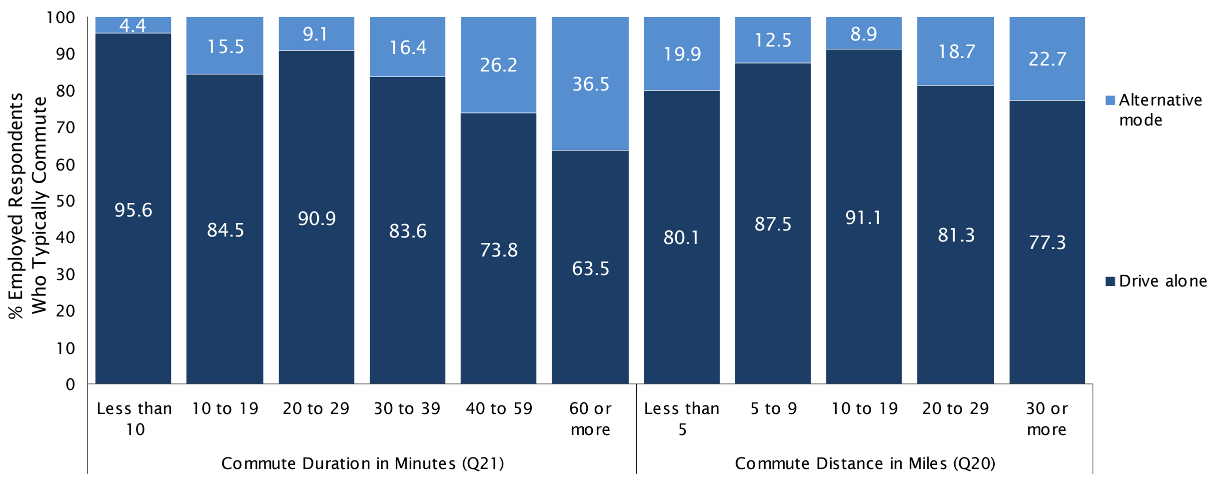


Figure 50 Primary Work Commute Mode by Commute Duration in Minutes & Commute Distance in Miles

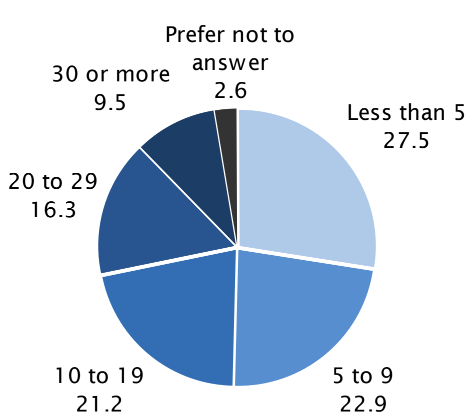


LENGTH OF COMMUTE Length of commute was measured both in terms of *distance* traveled one-way between an employee's home and their primary work place (Question 20), as well as the *time* it typically takes to commute between home and work if they drive directly without stops (Question 21).

In terms of commute *distance* (see Figure 51), half of respondents were represented in commute length categories of less than 10 miles (50%), one-in-five reported traveling 10 to 19 miles (21%), 16% commute 20 to 29 miles, and 10% commute 30 miles or more between work and home, one-way. An additional 3% of respondents were unsure or declined to state. The average commute length among all commuters was 13.13 miles, one-way, which is lower than the 15.45 miles average commute distance recorded in 2019.

Question 20 *In miles, what is the approximate distance between your home and your work place?*

Figure 51 Work Commute Distance in Miles by Study Year



The following figures show how average commute distances varied across subgroups of employees. In general, the longest average commute distances in 2022 were reported by those 35 to 44 years of age, Caucasian commuters, commuters with at least a four-year degree, those who self-describe as being very engaged in the community.

FIGURE 52 WORK COMMUTE DISTANCE IN MILES BY OVERALL, AGE, ETHNICITY & PRIMARY COMMUTE MODE

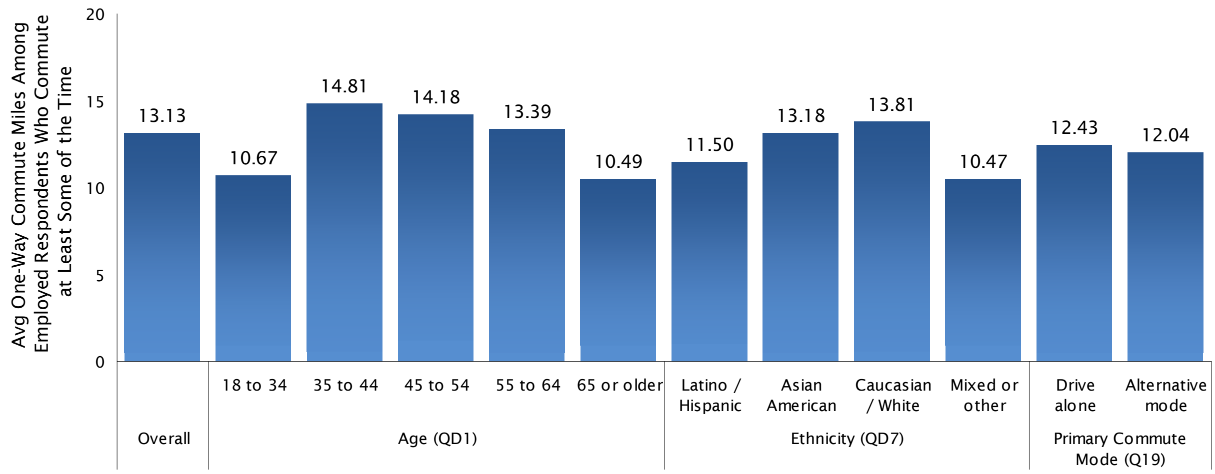
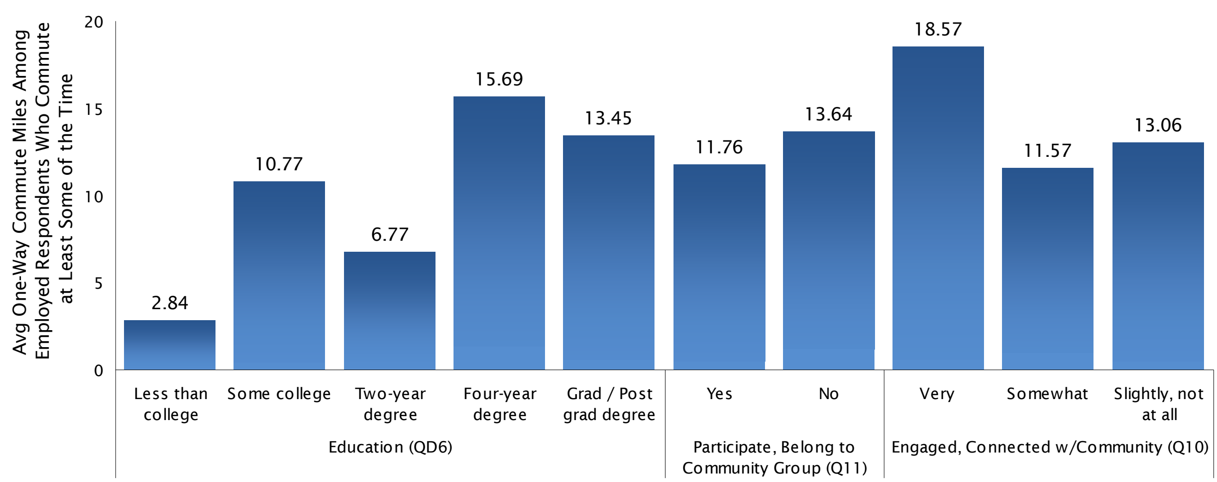


FIGURE 53 WORK COMMUTE DISTANCE IN MILES BY EDUCATION, PARTICIPATE, BELONG TO COMMUNITY GROUP & ENGAGED, CONNECTED WITH COMMUNITY



DURATION OF COMMUTE As for the *time* it typically takes an employee to commute to work one-way without stops, approximately 36% indicated it takes less than 20 minutes, 21% indicated it takes between 20 and 29 minutes, 15% reported their commute typically takes between 30 to 39 minutes, 8% stated that their one-way commute lasts between 40 to 59 minutes, and 9% offered that their commute lasts an hour or more. An additional 10% of employees were unsure or unwilling to share. The average commute duration among all commuters was 26.2 minutes in 2022, one-way, which is somewhat less than the 33.6 minutes reported in 2019. Those who used alternative modes for their commute reported the longest commute durations (see figures 55-57).

Question 21 *In time, how long does it typically take you to commute to work one-way if you travel there directly without stops?*

FIGURE 54 WORK COMMUTE DURATION IN MINUTES BY STUDY YEAR

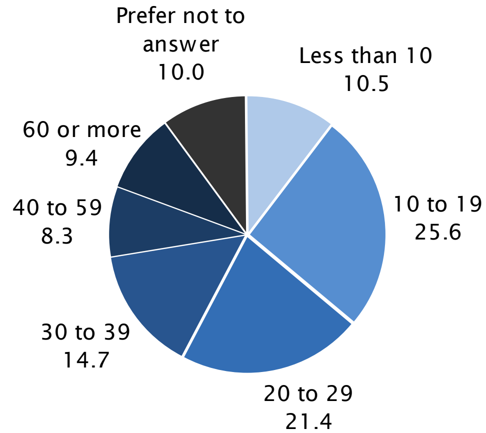


FIGURE 55 WORK COMMUTE DURATION IN MINUTES BY OVERALL, AGE, ETHNICITY & PRIMARY COMMUTE MODE

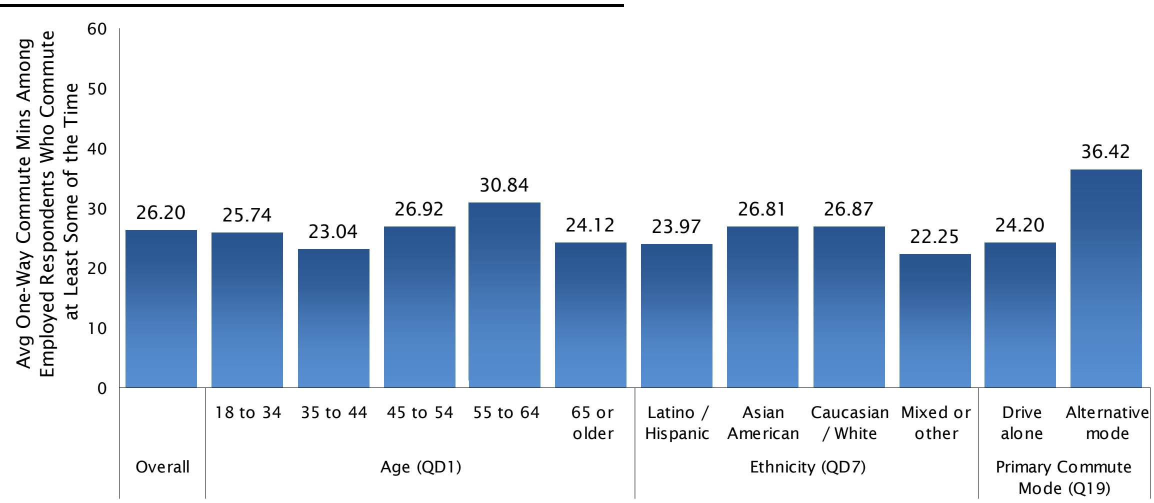


FIGURE 56 WORK COMMUTE DURATION IN MINUTES BY EDUCATION, PARTICIPATED, BELONG TO COMMUNITY GROUP & ENGAGED, CONNECTED WITH COMMUNITY

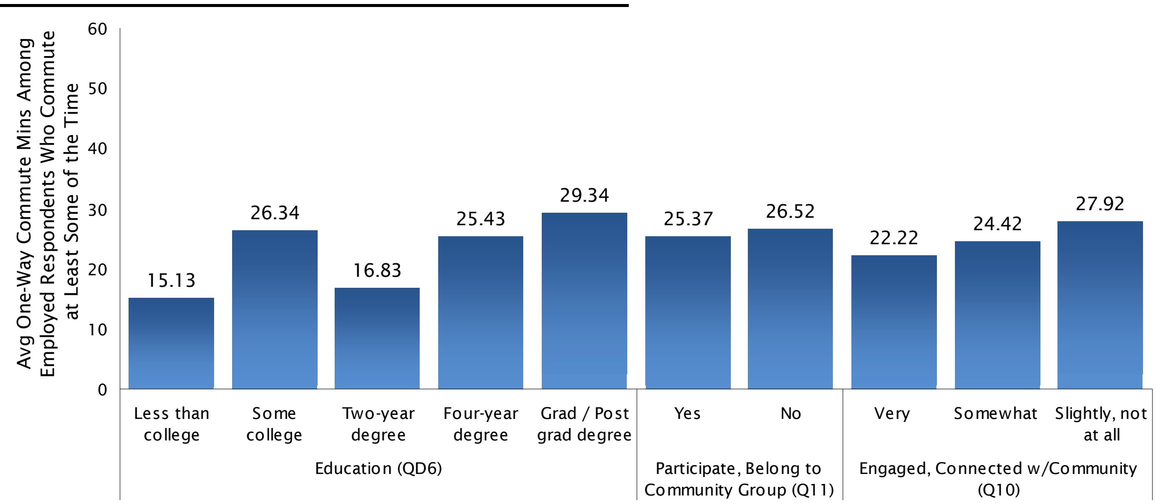
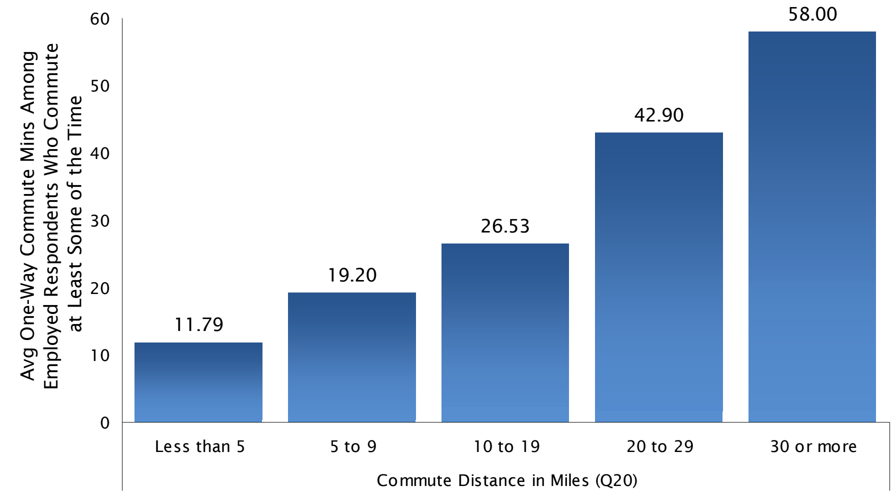


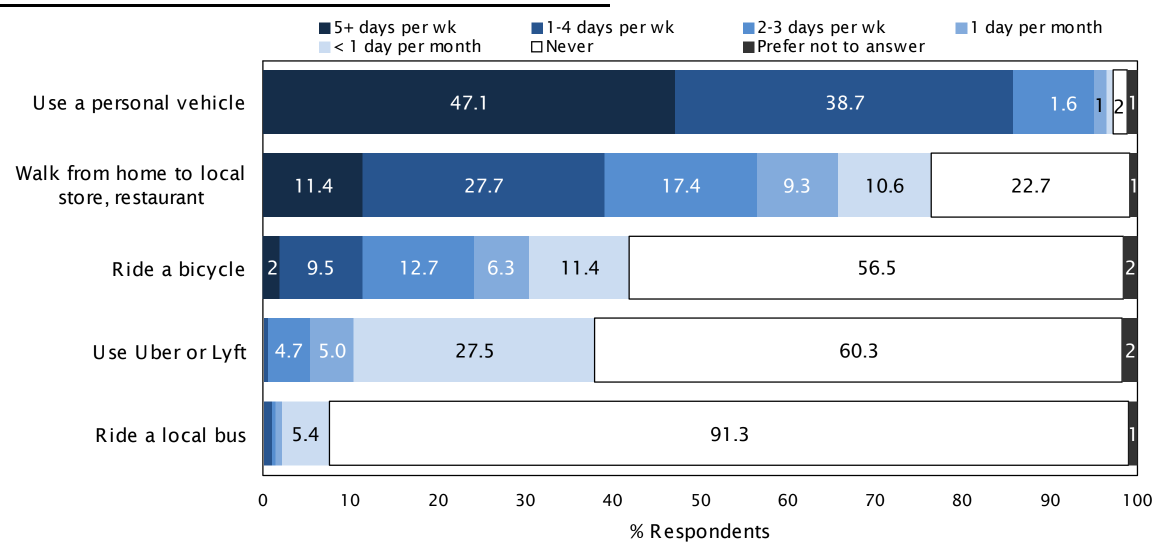
FIGURE 57 WORK COMMUTE DURATION IN MINUTES BY COMMUTE DISTANCE IN MILES



TRAVEL WITHIN SAN CARLOS Switching gears, all respondents (regardless of employment status) were asked how often they use each of the five different transportation modes shown to the left of Figure 58 when traveling with the City of San Carlos. The order of the items was randomized for each respondent to avoid a systematic position bias. Nearly all residents use a personal vehicle when traveling within San Carlos (97%) and three-quarters walk from home to a local store or restaurant (76%). Less than half of residents ride a bicycle (42%) or use Uber or Lyft (38%) when traveling within the City, and just 8% ride a local bus.

Question 22 *When traveling within the City of San Carlos, how often do you: _____?*

FIGURE 58 FREQUENCY OF TRAVELING WITHIN CITY OF SAN CARLOS



When compared to 2019, the percentage of San Carlos residents who walk to a local store or restaurant (+8%) and ride a bicycle (+5%) on a weekly basis in 2022 increased significantly, whereas the percentage who use an Uber or Lyft (-4%) and use a personal vehicle (-6%) decreased significantly (see Table 3). Tables 4 and 5 display weekly use of each transportation mode for travel within San Carlos by respondents' age, education, and gender.

Table 3 Frequency of Traveling Within City of San Carlos by Study Year

	Study Year 2022	Study Year 2019	Difference in % Weekly Use 2019 to 2022
Walk from home to local store, restaurant	39.0	31.2	+7.9†
Ride a bicycle	11.4	6.8	+4.6†
Ride a local bus	1.1	1.2	-0.1
Use Uber or Lyft	0.7	4.1	-3.5†
Use a personal vehicle	85.8	92.2	-6.4†

Table 4 Frequency of Traveling Within City of San Carlos by Overall & Age (Showing % Weekly)

	Overall	Age (QD1) 18 to 34	35 to 44	45 to 54	55 to 64	65 or older
Use a personal vehicle	85.8	83.6	90.5	87.7	82.7	85.3
Walk from home to local store, restaurant	39.0	60.5	42.9	38.3	31.9	21.4
Ride a bicycle	11.4	18.6	12.4	13.1	8.8	4.8
Ride a local bus	1.1	1.1	0.0	2.8	1.7	0.0
Use Uber or Lyft	0.7	0.0	1.3	1.0	0.5	0.0

Table 5 Frequency of Traveling Within City of San Carlos by Education & Gender (Showing % Weekly)

	Education (QD6)					Gender (QD5)	
	Less than college	Some college	Two-year degree	Four-year degree	Grad / Post grad degree	Male	Female
Use a personal vehicle	67.7	80.6	79.5	87.1	88.5	88.2	84.9
Walk from home to local store, restaurant	38.4	35.4	42.3	41.9	37.8	39.5	37.8
Ride a bicycle	0.0	6.5	5.4	15.4	11.0	18.0	5.6
Ride a local bus	0.0	0.0	2.6	0.8	1.4	0.7	1.6
Use Uber or Lyft	2.3	0.0	3.5	0.0	0.7	0.6	0.5

HYBRID AND ELECTRIC VEHICLES The next transportation-related question asked residents whether they own or lease a hybrid gas and electric vehicle or an all-electric vehicle. As shown in Figure 59 below, 23% of residents reported that they own a hybrid and 19% own an all-electric vehicle. The percentage who reported owning an all-electric vehicle increased significantly in the past three years, from 8% in 2019 to 19% in 2022. Figures 60 and 61 on the next page show how hybrid and all-electric vehicle ownership varied by demographic subgroups.

Question 23 *Do you own or lease: _____?*

Figure 59 Own or Lease Hybrid or All-Electric Vehicle by Study Year

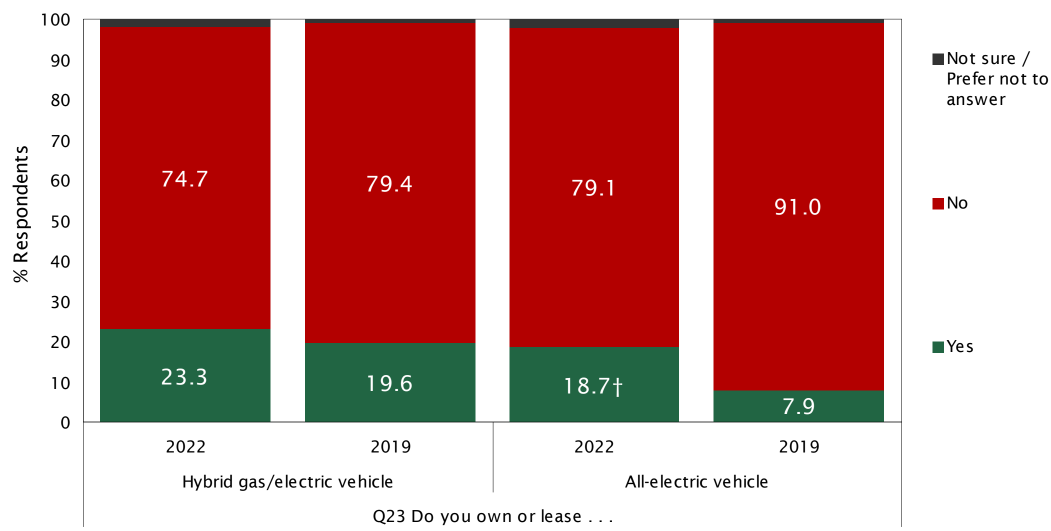


FIGURE 60 OWN OR LEASE HYBRID OR ALL-ELECTRIC VEHICLE BY EDUCATION & AGE

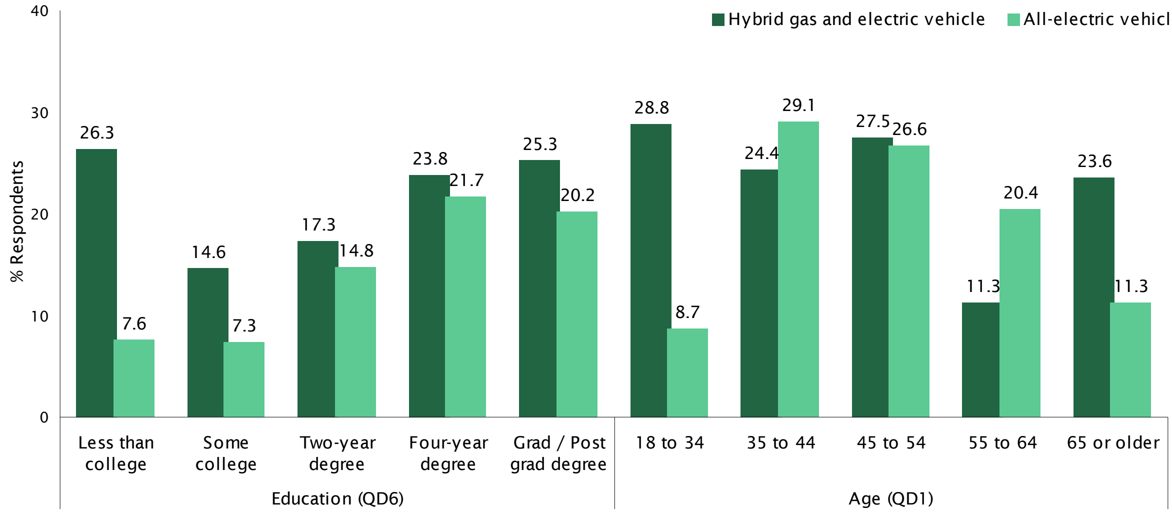
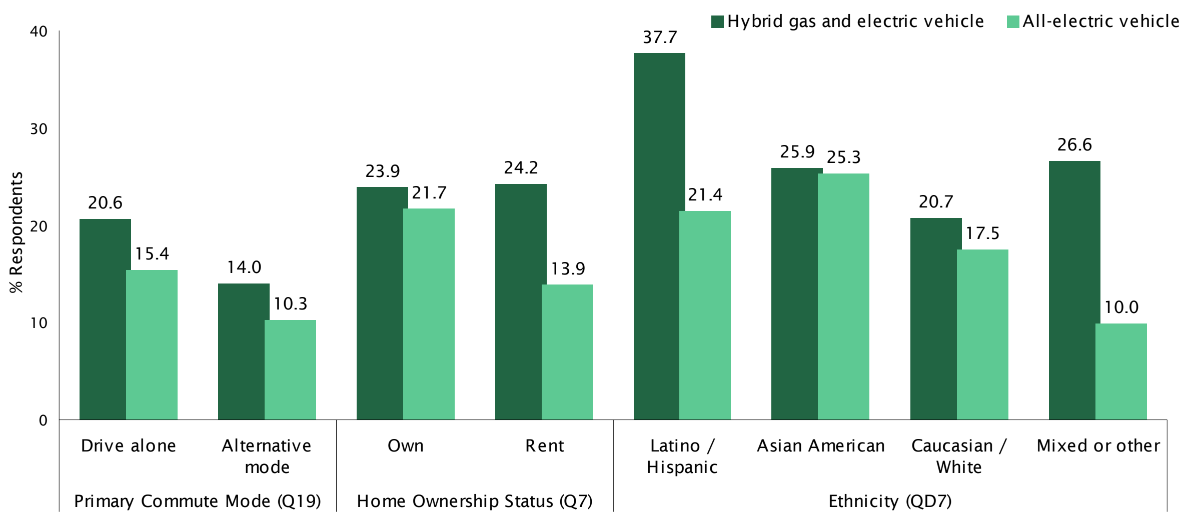


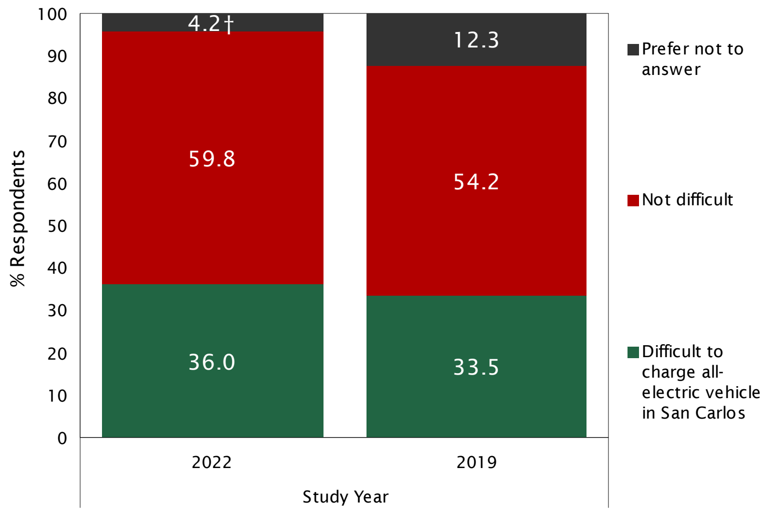
FIGURE 61 OWN OR LEASE HYBRID OR ALL-ELECTRIC VEHICLE BY PRIMARY COMMUTE MODE, HOME OWNERSHIP STATUS & ETHNICITY



ABILITY TO FIND EV CHARGING STATIONS The final question in this series asked respondents with an all-electric vehicle whether they find it difficult to charge their vehicle in the City of San Carlos. As shown in Figure 62 on the next page, just over one-third of all-electric vehicle owners (36%) answered Question 24 in the affirmative in 2022, which is similar to the percentage found in 2019.

Question 24 *Do you find it difficult to charge your electric vehicle in the City of San Carlos?*

FIGURE 62 DIFFICULTY TO CHARGE ELECTRICAL VEHICLE BY STUDY YEAR



Health & Lifestyle

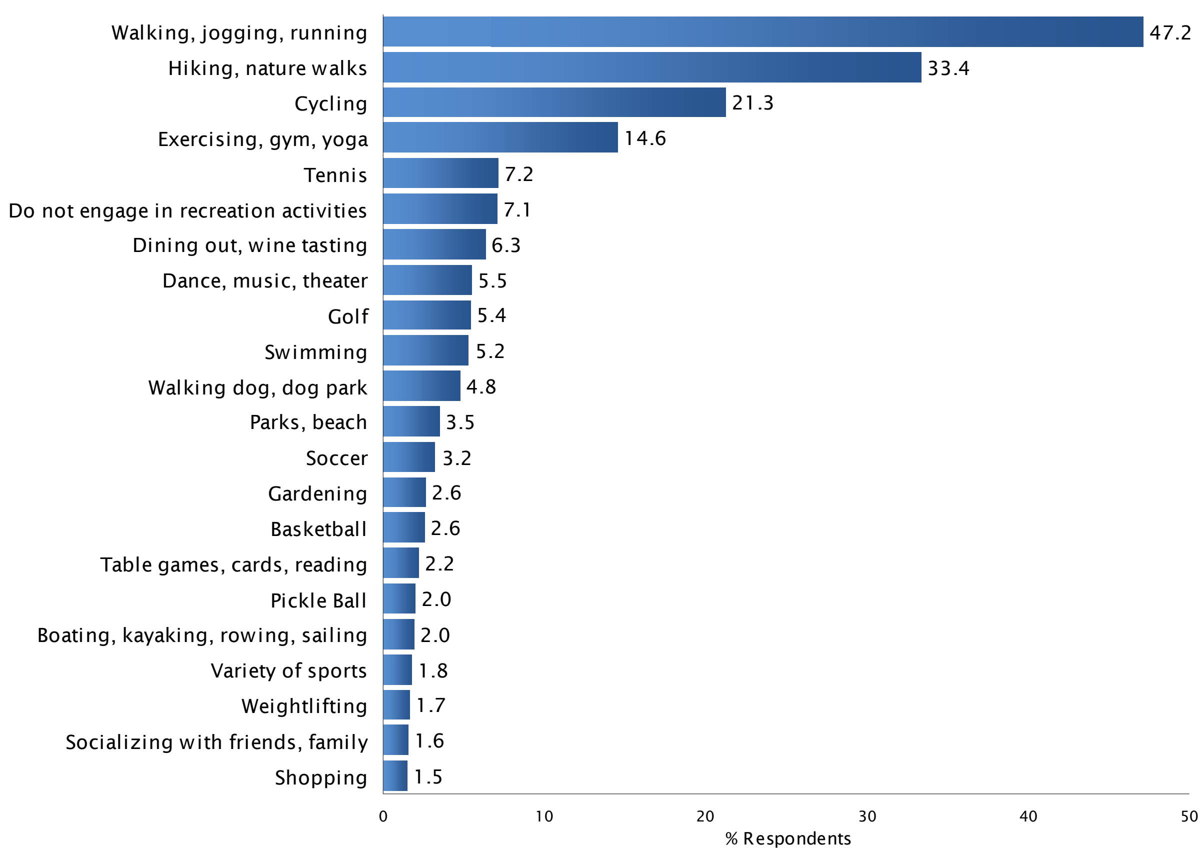
Having profiled residents' employment, commute, and transportation behaviors, the survey transitioned to the topics of health and lifestyle.

RECREATION ACTIVITIES Question 25 asked residents to describe the recreation activities that the adults in their household engage in most often. Question 26 on the next page asked a similar question focused on children and teenage members of the household. Both questions were posed in an open-ended manner, thereby allowing residents to mention any activities that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 63 (adult recreation) and Figure 64 (child/teen recreation).

Walking, jogging, and running was the most popular adult recreation activity (47%), followed by hiking/nature walks (33%), cycling (21%), and exercising/gym/yoga (15%). When compared to 2019, the percentage who reported hiking, taking nature walks, and cycling increased, whereas the percentage who indicated they exercise at the gym/yoga decreased.

Question 25 *Thinking of the adult members of your household, what recreation activities do the adults in your household engage in most often?*

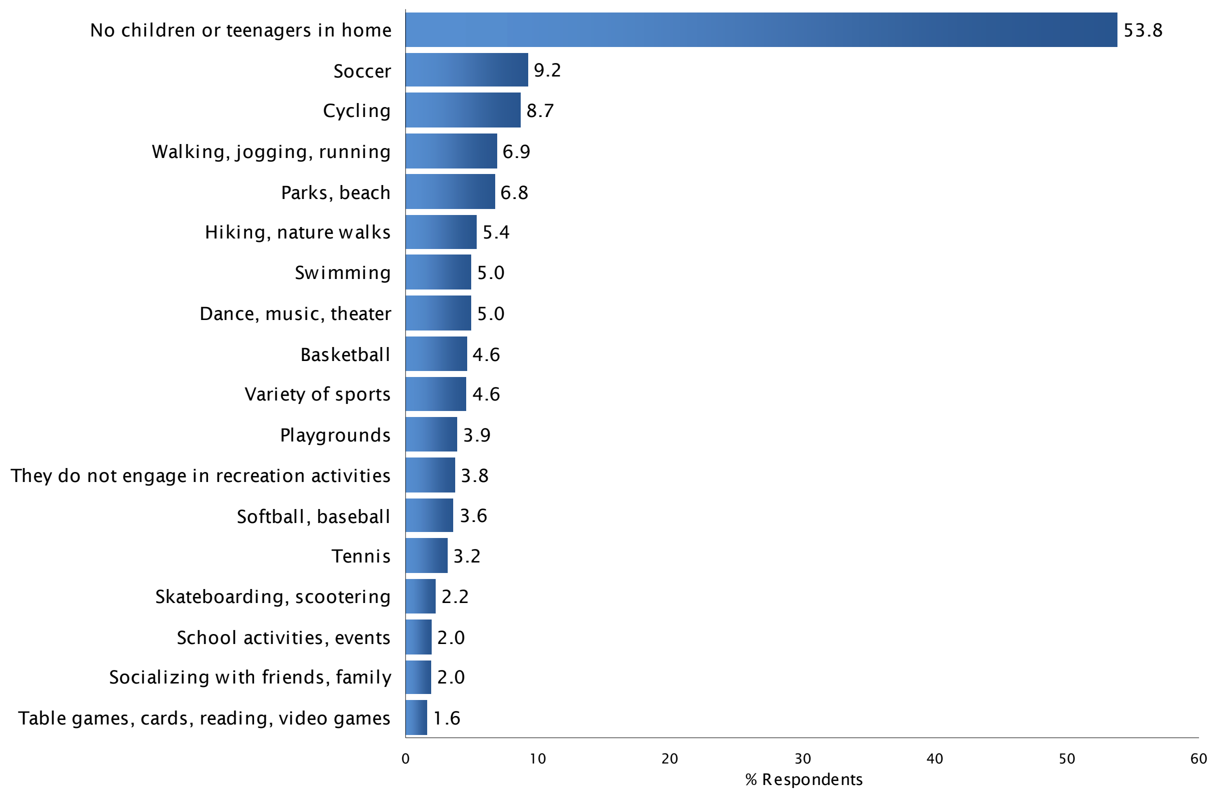
FIGURE 63 ADULT RECREATIONAL ACTIVITIES



Playing soccer (9%) and cycling (9%) were the most popular recreation activities among children and teenagers, followed by walking, jogging, and running (7%), going to the park/beach (7%), and hiking/nature walks (5%). The majority of residents do not have a child or teen in their home (54%), which is why the percentage figures for child/teen activities tend to be lower when compared to the adult percentages in the prior figure.

Question 26 *Thinking of the children and teenage members of your household, what recreation activities do they engage in most often?*

FIGURE 64 CHILD RECREATIONAL ACTIVITIES



HOUSE-CLEANING SERVICE OR LANDSCAPE MAINTENANCE SERVICE Respondents were next asked whether they use a house-cleaning service or maid (Question 27) or landscape maintenance service or gardener (Question 28). As shown in Figure 65 on the next page, 47% of residents reported using a house cleaner and 52% a landscape maintenance service or gardener in 2022, which is similar to the 2019 survey findings.

For the interested reader, figures 66 and 67 show the percentage of residents that use a house-cleaning services or maid and figures 68 and 69 display the percentage of residents that utilize a landscape maintenance service or gardener by a variety of resident subgroups.

Question 27 *Do you use a house-cleaning service or maid?*

Question 28 *Do you use a landscape maintenance service or gardener?*

FIGURE 65 USE HOUSE-CLEANING SERVICE BY STUDY YEAR

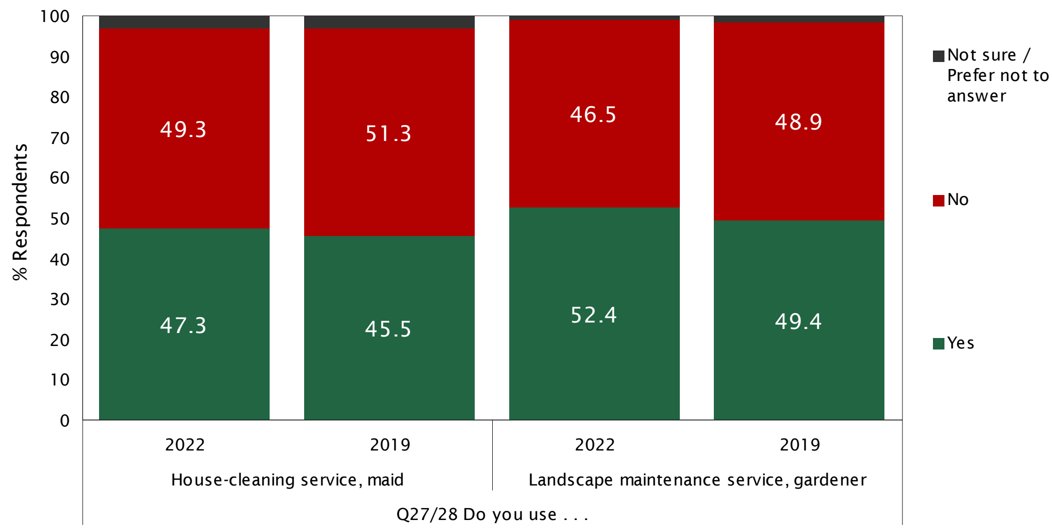


FIGURE 66 USE HOUSE-CLEANING SERVICE BY YEARS IN SAN CARLOS & TYPE OF RESIDENCE

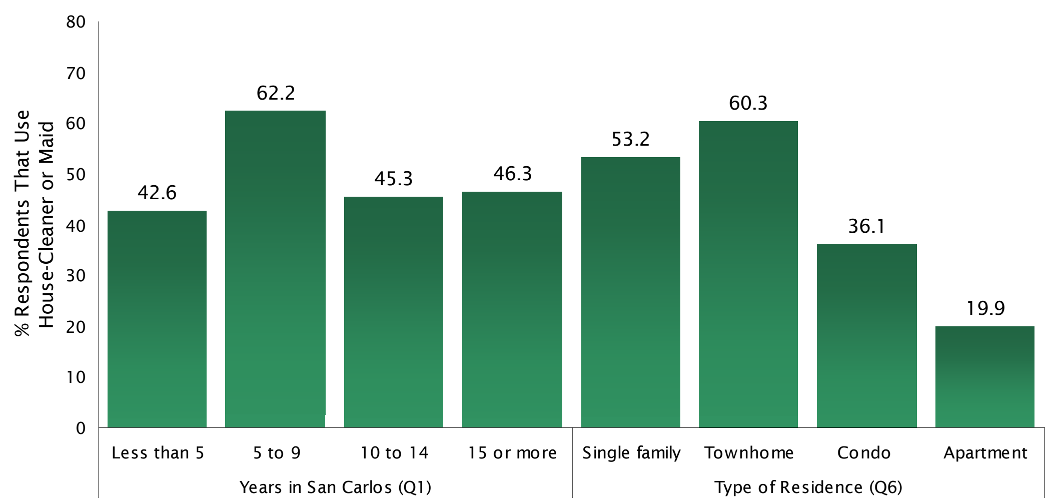


FIGURE 67 USE HOUSE-CLEANING SERVICE BY HOME OWNERSHIP STATUS & EMPLOYMENT STATUS

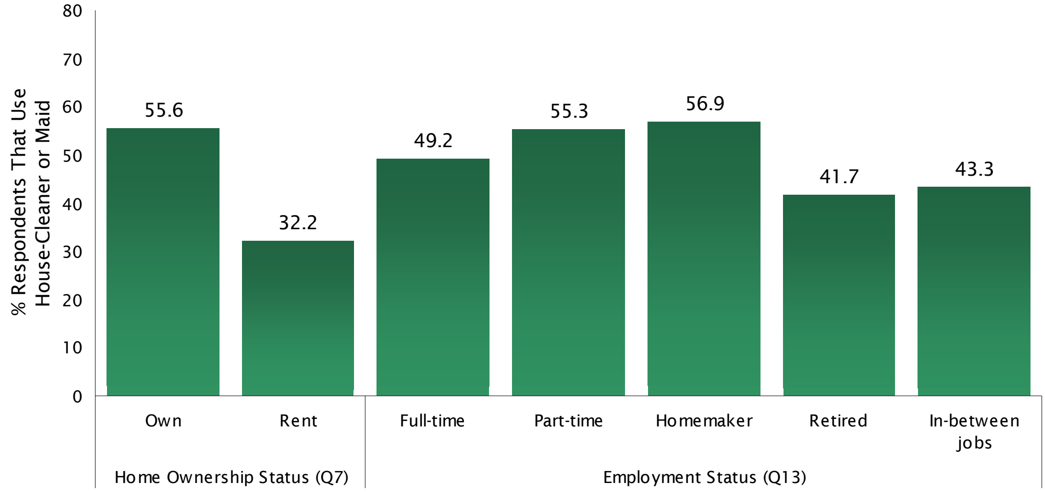


FIGURE 68 USE LANDSCAPE SERVICE BY YEARS IN SAN CARLOS, TYPE OF RESIDENCE & LIVE IN SAN CARLOS 10 YEARS FROM NOW

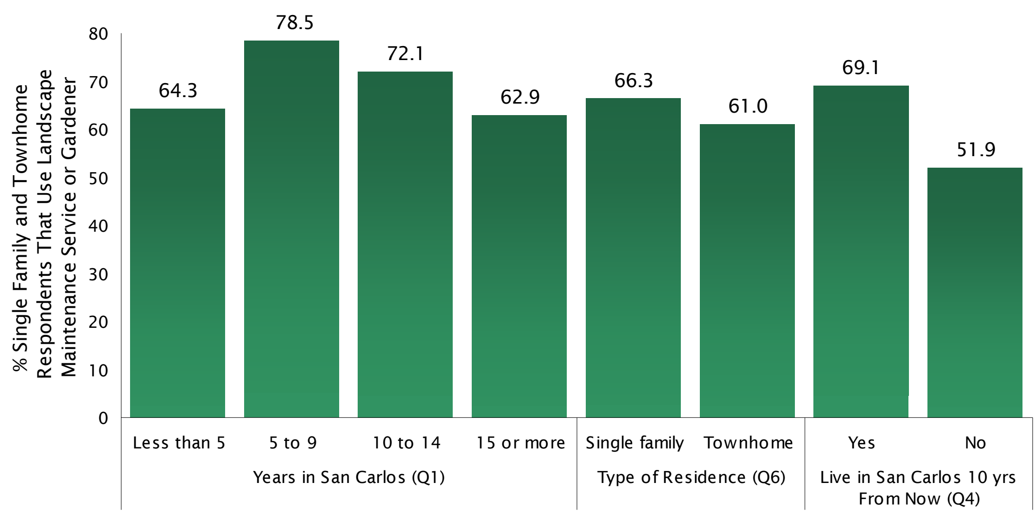
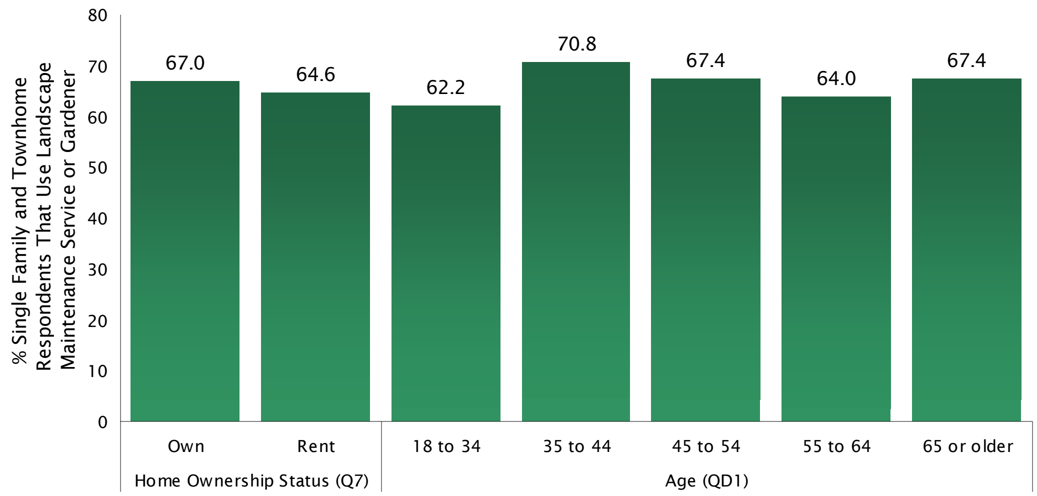


FIGURE 69 USE LANDSCAPE SERVICE BY HOME OWNERSHIP STATUS & AGE



HOME DELIVERY Question 29 asked San Carlos residents how often they have items delivered to their home, including goods and packages and food, meals, and groceries. Overall, 96% of residents have goods and packages delivered to their home from Amazon or other online retailers, with nearly two-thirds (65%) doing so weekly. More than seven-in-ten respondents (72%) also indicated they have food, meals and groceries delivered to their home, with 30% having weekly deliveries (Figure 70). When compared to 2019, the percentage of San Carlos residents who have packages (+20%) and food (+14%) delivered to their home on a weekly basis increased significantly in 2022 (see Table 6).

Question 29 *How often do you: _____? At least three times per week, one to two times per week, two to three times per month, once per month, less often than once per month, or never?*

FIGURE 70 FREQUENCY OF HOME DELIVERY

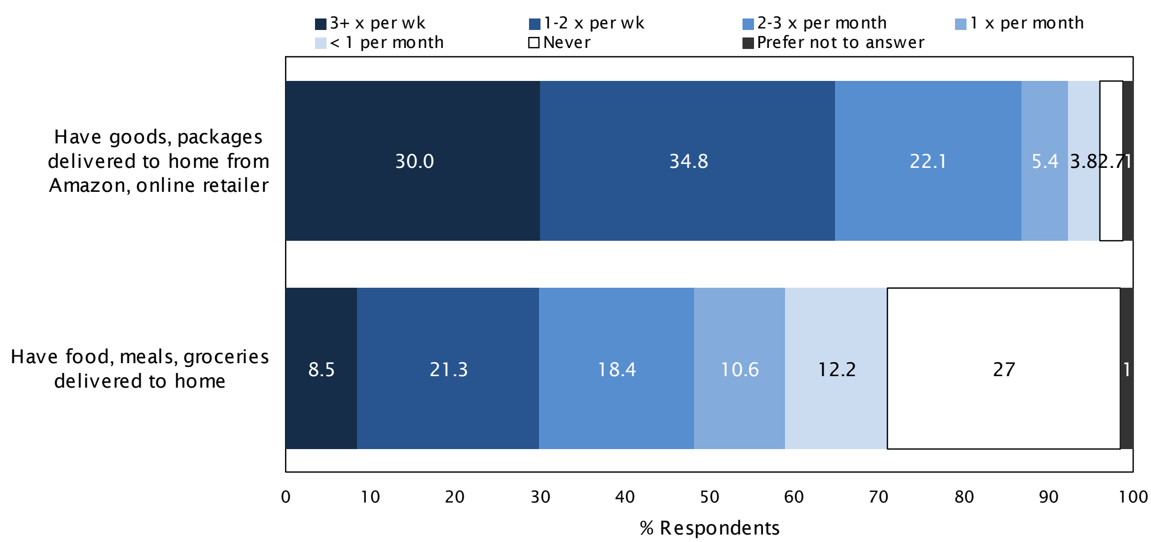


Table 6 Frequency of Home Delivery by Study Year

	Study Year 2022	Study Year 2019	Difference in % Weekly Use 2019 to 2022
Have goods, packages delivered to home from Amazon, online retailer	64.8	44.3	+20.4†
Have food, meals, groceries delivered to home	29.8	16.3	+13.5†

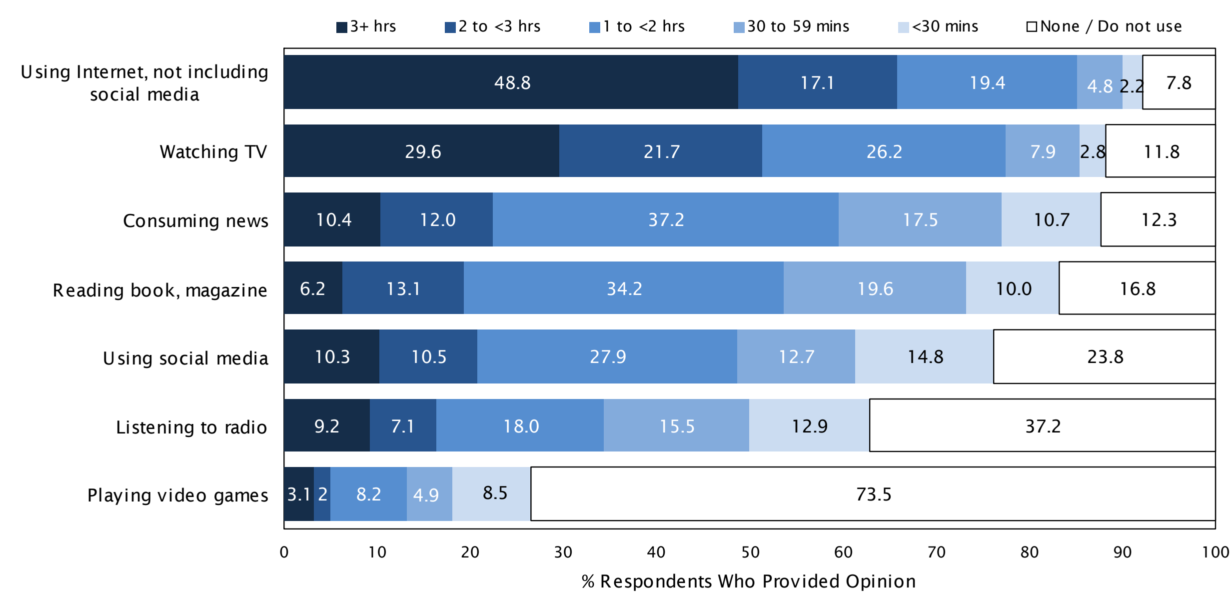
Table 7 Frequency of Home Delivery by Age & Home Ownership Status

	Age (QD1)					Home Ownership Status (Q7)	
	18 to 34	35 to 44	45 to 54	55 to 64	65 or older	Own	Rent
Have goods, packages delivered to home from Amazon, online retailer	68.2	76.3	72.5	62.4	47.8	68.7	56.5
Have food, meals, groceries delivered to home	36.2	45.8	35.0	25.6	8.9	29.4	30.4

DAILY MEDIA USE The last substantive question of this section asked respondents how much time they spend in a typical day on each form of media shown to the left of Figure 71. Whereas Figure 71 breaks down overall use of each type of media, Figure 72 displays average minutes per day spent on each activity. Overall media use was highest for the Internet, not including social media (92% of residents) with residents also spending the most time on that activity each day (228 minutes per day). Approximately 88% watch television each day, 88% of residents consume news, 83% read a book or magazine, 76% use social media, 63% listen to the radio, and 27% play video games daily.

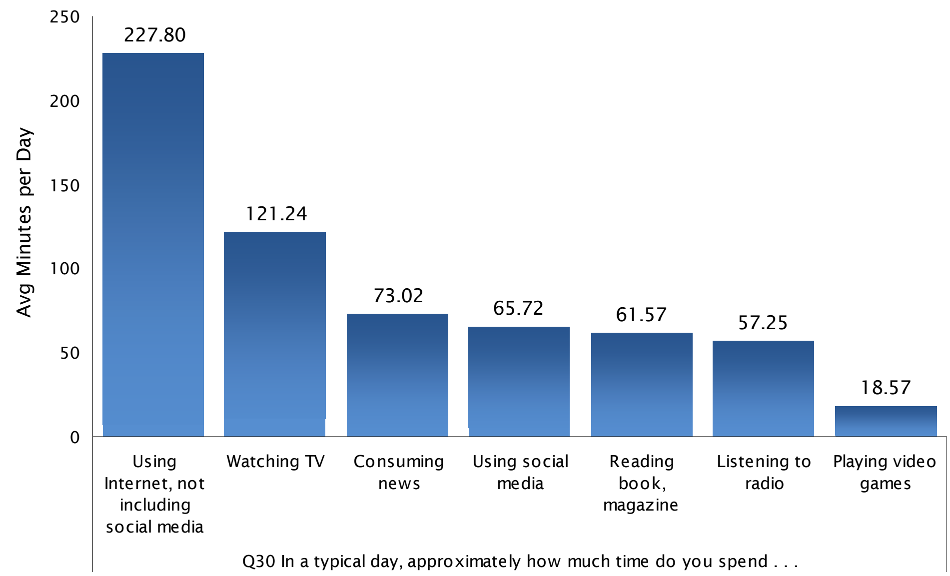
Question 30 *In a typical day, approximately how much time do you spend: _____?*

Figure 71 Daily Media Use



In terms of time spent on each activity (Figure 72), the average San Carlos resident spends nearly six hours in a typical day utilizing the Internet, not including social media (228 minutes per day) and watching television (121 minutes per day). Residents spend approximately an hour or more consuming news (73 minutes), using social media (66 minutes), reading books or magazines (62 minutes), and listening to the radio (57 minutes). San Carlos residents spend the least amount of time playing video games in a typical day (19 minutes).

FIGURE 72 DAILY MEDIA USE BY SHOWING AVERAGE MINUTES PER DAY



When compared to prior to the pandemic (2019), San Carlos residents reported much greater use of the Internet on a daily basis (+81 minutes) in 2022 (Table 8). Tables 9 and 10 show how daily minutes of use for each form of media varied by demographics.

TABLE 8 DAILY MEDIA USE IN MINUTES COMPARISON: 2019 TO 2022

	Study Year		Difference in Daily Minutes
	2022	2019	2019 to 2022
Using Internet, not including social media	227.8	146.62	81.2
Playing video games	18.57	12.46	6.1
Reading book, magazine	61.57	56.75	4.8
Using social media	65.72	62.43	3.3
Listening to radio	57.25	61.74	-4.5
Consuming news	73.02	80.99	-8.0
Watching TV	121.24	130.63	-9.4

TABLE 9 DAILY MEDIA USE SHOWING AVERAGE MINUTES PER DAY BY AGE & GENDER

	Age (QD1)					Gender (QD5)	
	18 to 34	35 to 44	45 to 54	55 to 64	65 or older	Male	Female
Using Internet, not including social media	256.8	242.5	270.8	221.9	163.7	231.7	232.3
Watching TV	114.8	78.4	99.5	144.3	172.3	115.2	129.2
Consuming news	75.1	48.4	66.0	84.1	96.1	73.7	73.8
Using social media	105.3	56.5	50.2	72.5	49.7	45.7	78.3
Reading book, magazine	52.1	45.7	53.5	63.3	92.3	56.0	69.5
Listening to radio	39.3	37.2	57.8	81.9	80.8	48.1	69.0
Playing video games	49.1	14.5	16.1	7.0	8.5	20.7	12.0

Table 10 Daily Media Use Showing Average Minutes Per Day by Engaged, Connected With Community & Ethnicity

	Engaged, Connected w/Community (Q10)			Ethnicity (QD7)			
	Very	Somewhat	Slightly, not at all	Latino / Hispanic	Asian American	Caucasian / White	Mixed or other
Using Internet, not including social media	248.8	228.0	226.6	285.9	245.2	215.6	228.5
Watching TV	105.9	118.4	130.5	99.4	108.0	127.7	116.8
Consuming news	72.2	67.8	78.6	56.6	58.7	78.3	63.1
Using social media	65.3	70.1	64.2	101.2	59.9	56.4	64.3
Reading book, magazine	56.2	61.6	64.1	54.7	53.5	62.9	66.2
Listening to radio	56.1	48.7	65.7	50.8	30.7	69.7	24.3
Playing video games	13.6	16.1	22.6	38.7	16.0	14.9	19.7

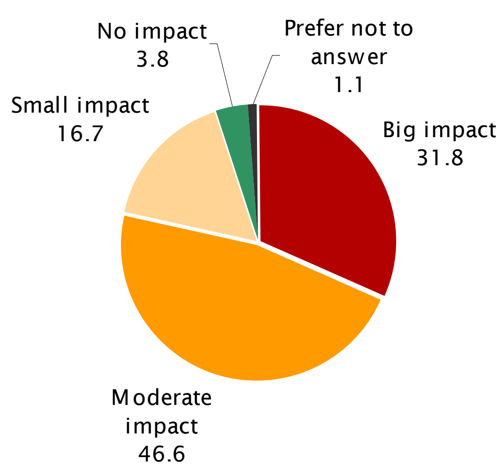
PANDEMIC

The two years leading up to the *2022 Community Characteristics Survey* were punctuated by difficult and dramatic events in San Carlos. The coronavirus pandemic that arrived in early 2020 has taken lives, threatened livelihoods, and forced dramatic changes in the way residents live, work, socialize, and play. As noted throughout this report, the 2022 survey found dramatic changes in where San Carlos residents are working and their daily use of the Internet, as well as significant changes in how connected they feel to the community, the recreation activities they engage in, and their reliance on home-delivery services. This final section of the survey addressed the topic of the pandemic head-on by asking residents to describe the main impacts of the pandemic on their household.

CURRENT IMPACT OF PANDEMIC Question 31 asked respondents the rate the pandemic's *current* impact on their household. As shown in Figure 73, approximately one-third of respondents (32%) stated the pandemic is currently having a big impact on their household, with an additional 47% describing the impact as moderate. Approximately one-in-five respondents indicated that the pandemic's current impacts on their household are either small (17%) or negligible (4%), whereas 1% preferred to not answer the question.

Question 31 *The COVID-19 pandemic can impact peoples' lives in a variety of ways. Currently, would you say the pandemic is having a big impact, moderate impact, small impact, or no impact on your household?*

FIGURE 73 IMPACT OF COVID-19 PANDEMIC



Although all resident subgroups had a high percentage of respondents indicating that the pandemic was having either a big or moderate impact on their household, those very engaged with the community, part-time workers and the unemployed, households with children under 13, Latino/Hispanic residents and those reporting mixed/other ethnicities, residents under 45 years of age, and San Carlos residents who work from home were most apt to describe the pandemic's current impacts on their household as big or moderate (see figures 74-76).

FIGURE 74 IMPACT OF COVID-19 PANDEMIC BY ENGAGED, CONNECTED WITH COMMUNITY & EMPLOYMENT STATUS

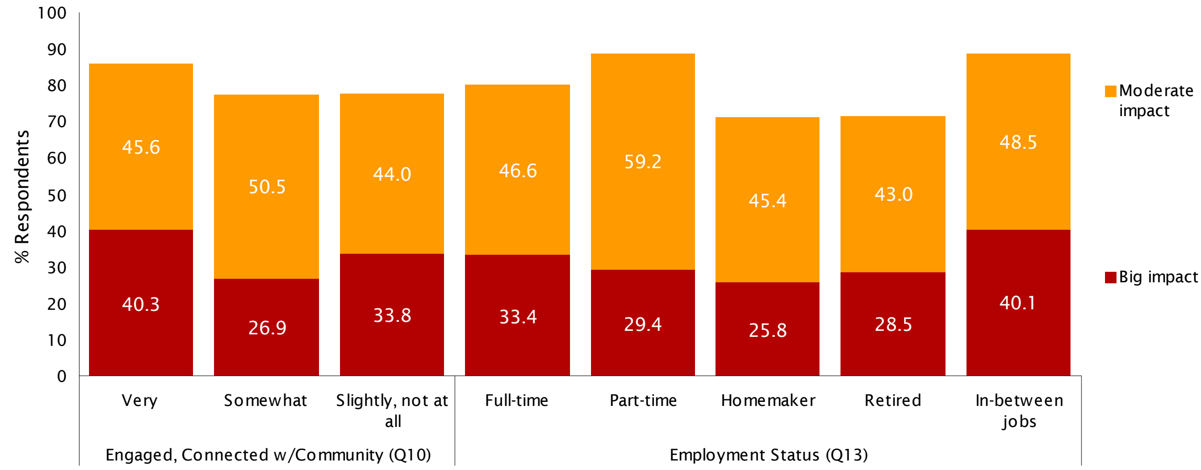


FIGURE 75 IMPACT OF COVID-19 PANDEMIC BY HSLD MEMBERS & ETHNICITY

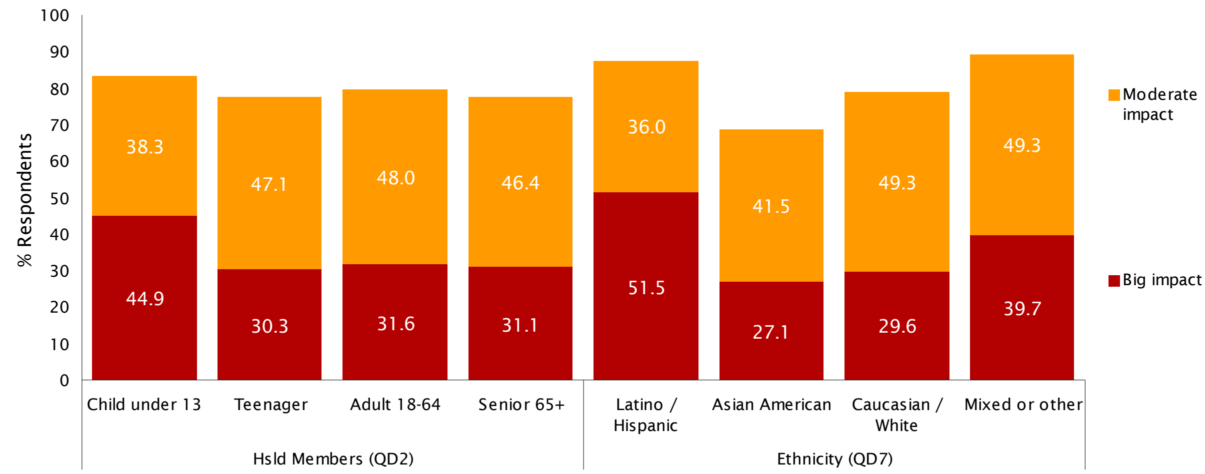
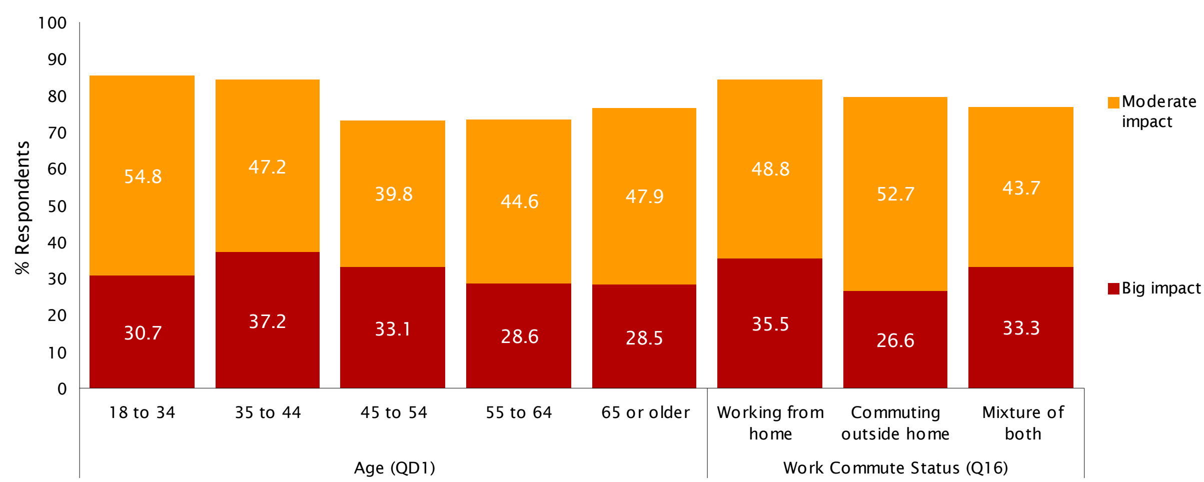


FIGURE 76 IMPACT OF COVID-19 PANDEMIC BY AGE & WORK COMMUTE STATUS

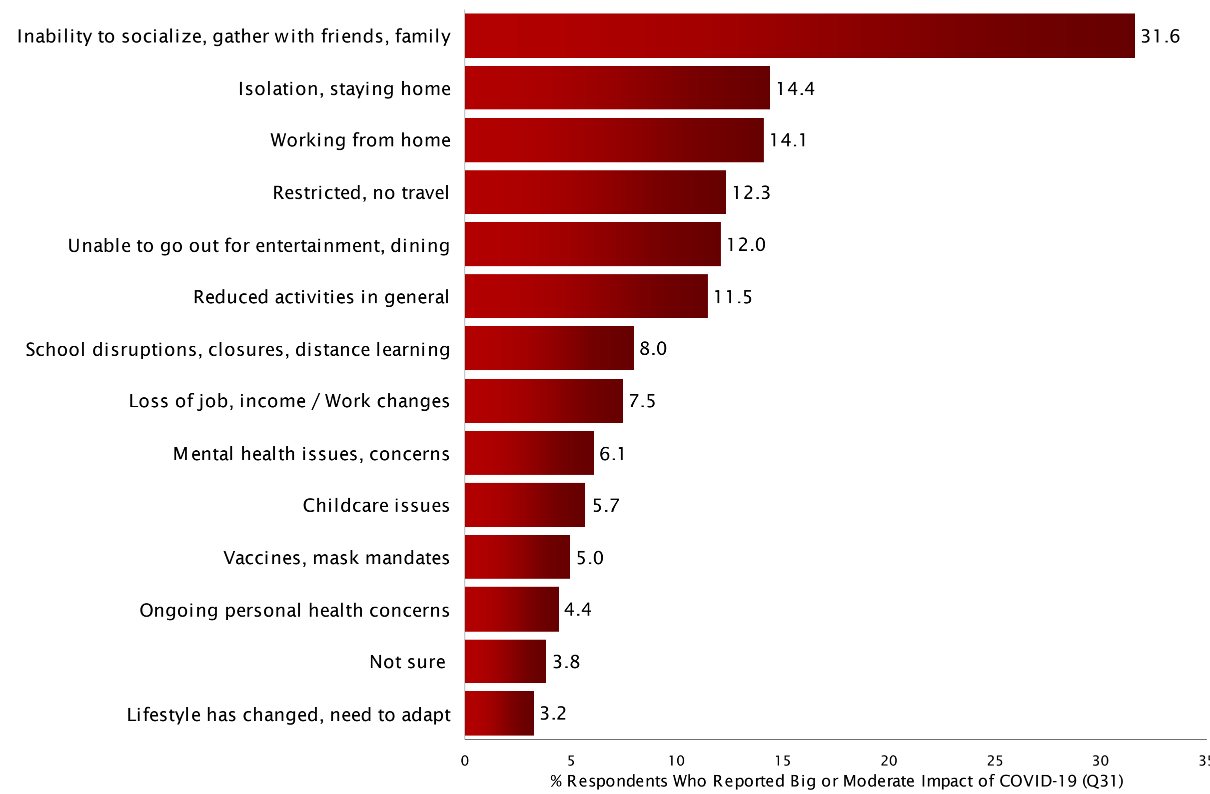


Respondents who rated the pandemic's impact on their household as big or moderate were subsequently asked to describe the *main* impact the pandemic is currently having on their household. Question 32 was presented in an open-ended manner, which allow respondents to mention any specific impact that came to mind. True North subsequently reviewed the verbatim responses and grouped them into the categories shown in Figure 77.

The most common impacts of the pandemic felt by San Carlos households are the inability to socialize or gather with friends and family (32%), isolation/staying home (14%), working from home (14%), and restrictions on travel (12%), ability to go out for entertainment/dining (12%), and engage in activities (12%).

Question 32 *What is the main impact the pandemic is having on your household currently?*

FIGURE 77 HSLD IMPACTS DUE TO PANDEMIC



BACKGROUND & DEMOGRAPHICS

TABLE 11 DEMOGRAPHICS OF SAMPLE BY STUDY YEAR

	Study Year	
	2022	2019
Total Respondents	*791*	*885*
Age (QD1)		
18 to 34	19.9	18.6
35 to 44	19.6	18.8
45 to 54	19.7	20.3
55 to 64	17.8	17.2
65 or older	19.2	18.3
Prefer not to answer	3.8	6.8
Hsld Members (QD2)		
Child under 13	27.3	25.5
Teenager	15.5	14.1
Adult 18-64	78.5	80.7
Senior 65+	28.7	33.6
Gender (QD5)		
Male	47.2	46.2
Female	48.2	51.2
Other	0.0	0.1
Prefer not to answer	4.6	2.6
Education (QD6)		
Less than college	4.7	4.7
Some college	6.5	10.4
Two-year degree	7.5	7.7
Four-year degree	36.9	31.4
Grad / Post grad degree	42.3	42.8
Prefer not to answer	2.2	3.1
Ethnicity (QD7)		
Latino / Hispanic	8.4	9.5
Asian American	16.3	13.6
Caucasian / White	63.4	65.1
Mixed or other	9.0	5.1
Prefer not to answer	2.9	6.8

Table 11 presents key demographic information collected during the survey. The primary motivations for collecting the background and demographic information were to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics, and ensure that the resulting sample matched the profile of San Carlos' adult population on key characteristics.

METHODOLOGY

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the City of San Carlos to develop a questionnaire that covered the topics of interest and avoided many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking items in a set order can lead to a systematic position bias in responses, the items were asked in a random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents that were employed full-time or part-time (Question 13) were asked to provide their current occupation (Question 14). The questionnaire included with this report (see *Questionnaire & Toplines* on page 54) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

PROGRAMMING & PRE-TEST Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the telephone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts interviewers to certain types of keypunching mistakes should they happen during the interview. The survey was also programmed into a passcode-protected online survey application to allow online participation for sampled residents. The integrity of the questionnaire was pre-tested internally by True North and by dialing into random homes in the City prior to formally beginning the survey.

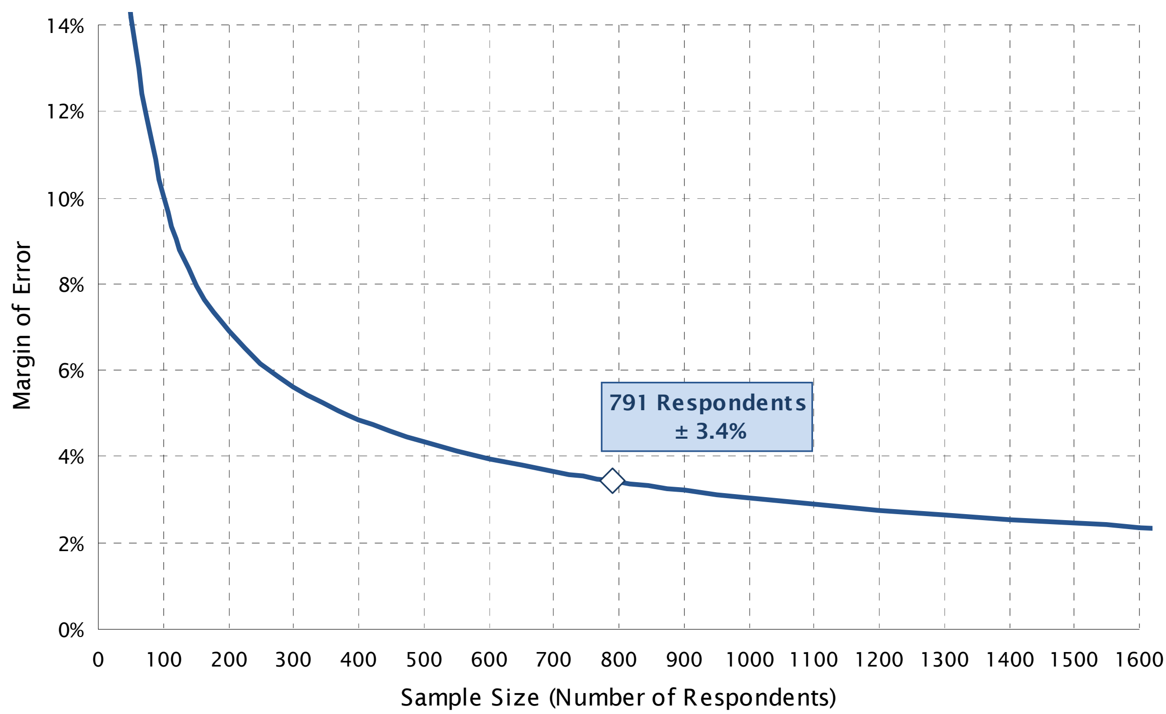
SAMPLE, RECRUITING & DATA COLLECTION A comprehensive database of San Carlos households was utilized for this study, ensuring that all households in San Carlos had the opportunity to be selected to participate in the survey. After random selection, additional contact information was appended to the file for adult residents and individuals were recruited to participate in the survey using a combination of email invitations, text invitations, and telephone calls. Each individual was assigned a unique passcode to ensure that only San Carlos residents who received an invitation could access the online survey site, and that the survey could be completed only one time per passcode. Following a period of online data collection, True North placed telephone calls to residents that had yet to participate in the online survey as a result of the email or text invitation, or for whom only land line contact information was available.

Telephone interviews averaged 17 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM). It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would bias the sample. A total of 791 completed surveys were gathered online and by telephone between January 13 and January 25, 2022.

MARGIN OF ERROR DUE TO SAMPLING The results of the survey can be used to estimate the opinions of all adult residents of the City. Because not every adult resident of the City participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 791 adult residents for a particular question and what would have been found if all of the estimated 23,103 adult residents[5] had been interviewed.

Figure 78 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is ± 3.4% for questions answered by all 791 respondents.

FIGURE 78 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by demographic characteristics such as length of residence and age of the respondent. Figure 78 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING & WEIGHTING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, and preparing frequency analyses and cross-tabulations. The final data were weighted to balance the sample by age and ethnicity according to Census estimates.

5. Source: U.S. Census Bureau, April 2020 estimate.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and figures for a given question.

QUESTIONNAIRE & TOPLINES

TRUE NORTH RESEARCH

City of San Carlos
Community Characteristics Survey Version
Final Toplines (n=791)
January 28, 2022

Section 1: Introduction to Study
Hi, my name is _____ and I'm calling from TNR on behalf of the City of San Carlos. The City is conducting a survey of its residents so it can learn more about their demographics, lifestyles, and opinions. Your participation in the survey will be confidential and will help the City better meet residents' needs and plan for the future.
If needed: This is a survey only – I'm NOT trying to sell anything and I won't ask for a donation. *If needed:* The survey should take about 14 minutes to complete. *If needed:* If now is not a convenient time, can you let me know a better time so I can call back? *If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to the measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.*

Section 2: Living in San Carlos			
I'd like to begin by asking you a few questions about what it is like to live in the City of San Carlos.			
Q1	How long have you lived in San Carlos?		
	1	Less than 1 year	4%
	2	1 to 4 years	18%
	3	5 to 9 years	13%
	4	10 to 14 years	13%
	5	15 years or longer	52%
	99	Prefer not to answer	0%
Q2	What do you like ***best*** about living in San Carlos? Verbatim responses recorded and later grouped into categories shown below.		
	Small town feeling		23%
	Nice community, neighbors		22%
	Downtown area		19%
	Walkability, everything close, within walking distance		18%
	Location, accessibility		15%
	Safety, low crime		14%
	Friendly, family oriented		14%
	Shopping areas, restaurants		14%
	Beautiful, clean city		9%
	Good schools		9%
	Open space, hills		7%

	Climate, weather	7%
	Parks	7%
	Nothing comes to mind / Not sure	4%
	Good governance in general	3%
	Public library	2%
	Variety of activities for youth, kids	2%
	Negative mentions	2%
Q3	What is the thing you would ***most*** like to change about San Carlos? Verbatim responses recorded and later grouped into categories shown below.	
	Limit growth, development	18%
	Provide more affordable housing	12%
	Nothing comes to mind / Not sure	10%
	Reduce traffic congestion	9%
	Provide more variety of restaurants, stores	9%
	Improve, maintain infrastructure, roads, sidewalks	8%
	Enforce traffic laws	7%
	Improve parking	6%
	Maintain, add park, recreation facilities	6%
	No changes desired / Everything is fine	6%
	More diversity in general	5%
	Improve public safety	4%
	Clean, beautify city, landscaping	3%
	Improve, provide more bike lanes	3%
	Improve, provide more schools	3%
	Improve downtown area	3%
	Pet friendlier, more dog parks	3%
	Improve governance in general	3%
	Provide more community events, activities	3%
	Reduce cost of living	2%
	Better city planning, development	2%
	Improve, provide more public transportation	2%
	Preserve, recapture small town feeling	2%
	Make Laurel St pedestrian only	2%

Q4	Do you anticipate that you will be living in San Carlos 10 years from now?			
	1	Yes	51%	*Ask Q5*
	2	No	14%	*Skip to Q6*
	98	Not sure	34%	*Ask Q5*
	99	Prefer not to answer	1%	*Ask Q5*
Q5	Once you are retired, do you anticipate still living in San Carlos?			
	1	Yes	27%	
	2	No	10%	
	3	I already am retired and living in San Carlos	20%	
	98	Not sure	42%	
	99	Prefer not to answer	1%	
Q6	Which of the following best describes your residence in San Carlos? *Read list.*			
	1	Detached single family home	75%	*Ask Q7*
	2	Townhome	4%	*Ask Q7*
	3	Condominium	6%	*Ask Q7*
	4	Apartment	13%	*Skip to Q10*
	5	Other	1%	*Skip to Q10*
	99	Prefer not to answer	1%	*Skip to Q10*
Q7	Do you own or rent your residence in San Carlos?			
	1	Own	77%	
	2	Rent	15%	
	3	Live rent free with family	6%	
	99	Prefer not to answer	2%	
Ask Q8 if Q6=1 AND Q7=1. Otherwise skip to Q10.				
Q8	In the next five years, do you plan to build an **accessory dwelling unit** – also known as a granny flat – on your property in San Carlos?			
	1	Yes	8%	*Ask Q9*
	2	No	75%	*Skip to Q10*
	98	Not sure	17%	*Skip to Q10*
	99	Prefer not to answer	0%	*Skip to Q10*

Q9	Do you plan to rent the accessory dwelling unit for supplemental income?		
	1	Yes	34%
	2	No	36%
	98	Not sure	31%
	99	Prefer not to answer	0%

Section 3: Community Connections			
Q10	In general, how engaged and connected do you feel to your San Carlos community? Would you say very, somewhat, slightly, or not at all engaged and connected?		
	1	Very engaged and connected	13%
	2	Somewhat engaged and connected	36%
	3	Slightly engaged and connected	37%
	4	Not engaged and connected	11%
	98	Not sure	1%
	99	Prefer not to answer	1%
Q11	Do you currently participate in or belong to any organized community groups in San Carlos?		
	1	Yes	29%
	2	No	63%
	98	Not sure	5%
	99	Prefer not to answer	3%
Q12	Thinking of the neighbors that live close to you in San Carlos, what proportion do you know **well**? All, most, some, or none?		
	1	All	5%
	2	Most	24%
	3	Some	55%
	4	None	15%
	98	Not sure	0%
	99	Prefer not to answer	0%

Section 4: Employment, Commute & Transportation

Next are a few questions about your employment and travel behavior.

Q13	Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?			
	1	Employed full-time	61%	*Ask Q14*
	2	Employed part-time	9%	*Ask Q14*
	3	Student	3%	*Skip to Q22*
	4	Homemaker	3%	*Skip to Q22*
	5	Retired	21%	*Skip to Q22*
	6	In-between jobs	2%	*Skip to Q22*
	98	Not sure	0%	*Skip to Q22*
	99	Prefer not to answer	2%	*Skip to Q22*

Q14	What is your current occupation? Verbatim responses recorded and later grouped into categories shown below.	
	Professional Specialty (not IT): (accountants, lawyers, engineers, scientists, lab technicians, biotechnicians, technical writers, artists, models)	26%
	Prefer not to answer	13%
	Executive: (General Managers, CEO, CFO, Controller, and other hi-level execs, business owners)	11%
	Information Technology (IT): (computer programmers, network administrators, web designers)	9%
	Supervisors and Managers: (staff supervisors, shift managers, service supervisors)	8%
	Sales: (sales and marketing agents, real estate agents)	6%
	Teachers: (Professors, educators, grade school, middle school, high school teachers)	6%
	Administrative and Office Workers: (clerical, administrative support, secretaries, receptionists, data entry, data processing, schedulers, inventory accounting, records processing, adjusters and collectors)	4%
	Other (unique responses)	4%
	Craft and repair: (Construction, mechanics, electricians, appliances installations and repair technician, handyman, HVAC technician, general contractors)	3%

	Physicians: (doctors, dentists, physicians)	3%
	Medical Assistants: (medical technicians, medical assistants, LVN, nursing assistant, home health aides, care givers, pharmacist)	2%
	Contractor	1%
	Government	1%
	Nurses: (RNs only)	1%
	Operators, fabricators and laborers: (Machine operators, manual laborers, non-electronic assemblers, vehicle/truck operators, stockroom helpers, packers, drivers, farmers)	1%
	Protective Services: (security guards, safety officers, bouncers, police, fireman)	1%
	Self Employed, freelance	1%
Q15	And what industry do you work in? *If pauses, ask:* What does your company do? Verbatim responses recorded and later grouped into categories shown below.	
	IT Manufacturing services: Computer, Software and Electronics Manufacturing and Services	29%
	Education: Any educational institution, including public and private schools, colleges and universities	10%
	Prefer not to answer	10%
	Business Services: Businesses that provide services to other businesses, including legal, advertising, printing, engineering, accounting, IT services, install and repair services)	8%
	Medical and Social Services: Businesses that provide health care, hospitals, social assistance	8%
	Biosciences and Pharmaceuticals: Companies that research and manufacture biological, chemical and medicinal products including laboratory and medical equipment	7%
	Financial Services: Banks, credit unions, investment consulting, income tax preparer	6%
	Construction: Builders and developers, heavy construction, special trades	3%
	Sales	3%
	Other (unique responses)	3%
	Government / Public Administration: Any government agency such as a city, county, or publicly funded agency	2%
	Hospitality, Visitor and Entertainment Services	2%

	Non-IT Manufacturing: Manufacturers of products that are not electronic, such as food, textiles, clothing, recreational goods		2%	
	Religious / Non-profit Industry		2%	
	Security Services		2%	
	Communications: Telephone, radio and cable companies, companies that manufacture communications-related products such as phones and fax machines		1%	
	Retail: Retails stores and outlets that sell products directly to consumers		1%	
	Transportation		1%	
Q16	Are you currently working from home, commuting to a workplace outside of your home, or a mixture of both?			
	1	Working from home	47%	*Ask Q17*
	2	Commuting to a workplace outside home	25%	*Skip to Q19*
	3	Mixture of both	28%	*Ask Q17*
	99	Prefer not to answer	0%	*Skip to Q19*
Q17	How many days do you *primarily* work from home each week?			
	1	One	5%	
	2	Two	10%	
	3	Three	13%	
	4	Four	15%	
	5	Five or more	56%	
	99	Prefer not to answer	1%	
Q18	Do you own a home-based business?			
	1	Yes	10%	
	2	No	88%	
	99	Prefer not to answer	2%	
	Ask Q19 if Q16=(2,3). Otherwise skip to Q22.			
Q19	What method of transportation do you use <u>most</u> of the time when commuting to your work place? *If says drive, ask:* Do you drive alone or carpool with others? *If respondent says uses more than one transportation method each day, record the method they use for the longest portion of their commute.*			
	1	Drive **alone** in a car, truck, SUV, or van	83%	
	2	Carpool (ride together 2 to 4 people)	3%	

	3	Vanpool (ride together with 5 to 15 people)	0%
	4	Motorcycle	0%
	5	On-demand rideshare service like Uber or Lyft	0%
	6	Zipcar	0%
	7	Taxi	0%
	8	Employer-provided shuttle/bus	0%
	Public Transit		
	9	Bus	1%
	10	BART	1%
	11	Caltrain	5%
	12	Other public transit	0%
	13	Bike	2%
	14	Walk/jog/run	4%
	15	Other	1%
	99	Prefer not to answer	0%
Q20	In **miles**, what is the approximate distance between your home and your work place? *If respondent not sure, ask them to estimate.* Miles recorded and later grouped into ranges shown below. Average commute = 13.13 miles.		
	Less than 5		28%
	5 to 9		23%
	10 to 19		21%
	20 to 29		16%
	30 or more		9%
	Prefer not to answer		3%
Q21	In **time**, how long does it typically take you to commute to work **one-way** if you travel there directly without stops? *If respondent says it depends or not sure, ask them to estimate their average time in minutes.* Miles recorded and later grouped into ranges shown below. Average commute = 26.20 minutes.		
	Less than 10		10%
	10 to 19		26%
	20 to 29		21%
	30 to 39		15%
	40 to 59		8%
	60 or more		9%
	Prefer not to answer		10%

Q22	When traveling *within* the City of San Carlos, how often do you: _____?							
	Read in Order	5+ days per week	1 to 4 days per **week**	2 to 3 days per **month**	1 day per **month**	Less than 1 day per **month**	Never	Prefer not to answer
A	Use a personal vehicle	47%	39%	9%	2%	1%	2%	1%
B	Ride a local bus	0%	1%	0%	1%	5%	91%	1%
C	Use Uber or Lyft	0%	1%	5%	5%	28%	60%	2%
D	Walk from your home to a local store or restaurant	11%	28%	17%	9%	11%	23%	1%
E	Ride a bicycle	2%	10%	13%	6%	11%	57%	2%

Q23	Do you own or lease: _____?			
	Read in order	Yes	No	Prefer not to answer
A	A hybrid gas and electric vehicle	23%	75%	2%
B	An all-electric vehicle	19%	79%	2%

Ask Q24 if Q23B=1.

Q24	Do you find it difficult to charge your electric vehicle in the City of San Carlos?		
	1	Yes	36%
	2	No	60%
	99	Prefer not to answer	4%

Section 5: Health and Lifestyle

Next are a few questions about your health and lifestyle.

Q25	Thinking of the **adult** members of your household, what recreation activities do the adults in your household engage in most often? *Probe:* Any others? Verbatim responses recorded and later grouped into categories shown below.	
	Walking, jogging, running	47%
	Hiking, nature walks	33%
	Cycling	21%
	Exercising, gym, yoga	15%

	Tennis	7%
	Do not engage in recreation activities	7%
	Dance, music, theater	6%
	Dining out, wine tasting	6%
	Walking dog, dog park	5%
	Swimming	5%
	Golf	5%
	Soccer	3%
	Basketball	3%
	Parks, beach	3%
	Gardening	3%
	Table games, cards, reading	2%
	Variety of sports	2%
	Socializing with friends, family	2%
	Boating, kayaking, rowing, sailing	2%
	Shopping	2%
	Pickle Ball	2%
	Weightlifting	2%
Q26	Thinking of the **children and teenage** members of your household, what recreation activities do they engage in most often? *Probe:* Any others? Verbatim responses recorded and later grouped into categories shown below.	
	No children or teenagers in home	54%
	Soccer	9%
	Cycling	9%
	Walking, jogging, running	7%
	Parks, beach	7%
	Basketball	5%
	Swimming	5%
	Variety of sports	5%
	Dance, music, theater	5%
	Hiking, nature walks	5%
	Softball, baseball	4%
	Playgrounds	4%
	They do not engage in recreation activities	4%
	Tennis	3%
	Table games, cards, reading, video games	2%
	Socializing with friends, family	2%

	Skateboarding, scootering		2%
	School activities, events		2%
Q27	Do you use a house-cleaning service or maid?		
	1	Yes	47%
	2	No	49%
	99	Prefer not to answer	3%
Ask Q28 if Q6=(1,2).			
Q28	Do you use a landscape maintenance service or gardener?		
	1	Yes	66%
	2	No	33%
	99	Prefer not to answer	1%

Q29 How often do you: _____? At least three times per week, one to two times per week, two to three times per month, once per month, less often than once per month, or never?

	Read in Order	3+ times per **week**	1 to 2 times per **week**	2 to 3 times per **month**	1 time per **month**	Less than 1 per **month**	Never	Prefer not to answer
A	Have food, meals, or groceries *delivered* to your home?	9%	21%	18%	11%	12%	27%	1%
B	Have goods or packages *delivered* to your home from Amazon or another online retailer	30%	35%	22%	5%	4%	3%	1%

Q30 In a typical day, approximately how much time do you spend: _____? *If unsure or says it varies, ask them to estimate. Record to nearest quarter hour.*

	Read in Order	Average Minutes per Day	None / Do Not Typically Use	Less than 30 mins	30 to 59 mins	1 hr. to less than 2 hrs.	2 hrs. to less than 3 hrs.	3 or more hrs.	Prefer not to answer
A	Consuming news	73.02	11%	9%	15%	33%	11%	9%	12%
B	Watching television	121.24	10%	3%	7%	23%	19%	26%	11%
C	Listening to the radio	57.25	33%	11%	14%	16%	6%	8%	11%
D	Using social media	65.72	21%	13%	11%	25%	9%	9%	11%
E	Using the Internet, not including social media	227.80	7%	2%	4%	17%	15%	44%	11%
F	Reading a book or magazine	61.57	15%	9%	18%	31%	12%	6%	10%
G	Playing video games	18.57	66%	8%	4%	7%	2%	3%	10%

Section 6: Pandemic				
Q31	The COVID-19 pandemic can impact peoples' lives in a variety of ways. *Currently*, would you say the pandemic is having a big impact, moderate impact, small impact, or no impact on your household?			
	1	Big impact	32%	*Ask Q32*
	2	Moderate impact	47%	*Ask Q32*
	3	Small impact	17%	*Skip to D1*
	4	No impact	4%	*Skip to D1*
	99	Prefer not to answer	1%	*Skip to D1*
Q32	What is the ***main*** impact the pandemic is having on your household currently? Verbatim responses recorded and later grouped into categories shown below.			
	Inability to socialize, gather with friends, family		32%	
	Isolation, staying home		14%	
	Working from home		14%	
	Restricted, no travel		12%	
	Unable to go out for entertainment, dining		12%	
	Reduced activities in general		11%	
	School disruptions, closures, distance learning		8%	
	Loss of job, income / Work changes		7%	
	Childcare issues		6%	
	Mental health issues, concerns		6%	
	Vaccines, mask mandates		5%	
	Ongoing personal health concerns		4%	
	Lifestyle has changed, need to adapt		3%	

Section 7: Demographics		
Thank you so much for your participation. I have just a few more background questions for statistical purposes.		
D1	In what year were you born? Year of birth recorded age categories shown below.	
	18 to 24	5%
	25 to 34	15%
	35 to 44	20%
	45 to 54	20%
	55 to 64	18%
	65 or older	19%
	Prefer not to answer	4%

D2	How many: _____ live in your household?					
	Read in Order	Zero	One	Two	Three or more	Prefer not to answer
A	Children under 13 years of age	68%	14%	11%	2%	5%
B	Teenagers	80%	10%	5%	1%	5%
C	Adults age 18 to 64	17%	15%	51%	13%	5%
D	Seniors age 65 or older	66%	14%	14%	1%	5%

Ask QD3 if QD2A=(1,2,3).

D3	For childcare, do you: _____?			
	Read in Order	Yes	No	Not sure / Prefer not to answer
A	Have a stay-at-home parent who watches your kids	33%	62%	5%
B	Have a relative watch your kids	20%	75%	5%
C	Have a nanny or other non-relative watch your kids – either in your home or at their home	14%	81%	5%
D	Use a daycare center not located in your home	37%	58%	5%

Ask D4 if QD2D=(1,2,3).

D4	Is there a senior member of your household that currently receives in-home healthcare services?		
	1	Yes	4%
	2	No	96%
	99	Prefer not to answer	0%

D5	What is your gender?		
	1	Male	47%
	2	Female	48%
	3	Non-binary	1%
	4	Other	0%
	99	Prefer not to answer	3%

D6	What was the last grade you completed in school?

	1	Less than high school	1%
	2	High school graduate	4%
	3	Vocational/Trade certificate	1%
	4	Some college	6%
	5	Two-year degree	6%
	6	Four-year degree	37%
	7	Post-graduate work/Graduate degree	42%
	8	Not sure	0%
	9	Prefer not to answer	2%
D7	What ethnic group do you consider yourself a part of or feel closest to*? Read list if respondent hesitates*		
	1	Latino/Hispanic	8%
	2	Asian American -- Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian	16%
	3	Caucasian/White	63%
	4	African-American/Black	2%
	5	American Indian or Alaskan Native	0%
	6	Pacific Islander	1%
	7	Middle Eastern	3%
	8	Mixed Heritage	1%
	98	Other	0%
	99	Prefer not to answer	3%

Those are all of the questions that I have for you! Thanks so much for participating in this important survey! This survey was conducted for the City of San Carlos