San Carlos Citizen Survey
Summary Report

prepared for the
City of San Carlos

February 15, 2021

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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 30,145 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. Although the City has struggled over the past decade to maintain a balanced budget and has been forced on multiple occasions to cut back services, the transition to a shared-service model has allowed the City to restore balance to its finances and stop the annual cycle of service reductions. In fact, the shared-services model saves the City approximately $4 million annually while enabling increases in service levels for public safety, recreation, and maintenance.

To monitor its progress in meeting residents' needs, the City engages residents on a daily basis and receives periodic *subjective* feedback regarding its performance. Although these informal feedback mechanisms are a valuable source of information for the City in that they provide timely and accurate information about the opinions of specific residents, it is important to recognize that they do not necessarily provide an accurate picture of the community as a whole. For the most part, informal feedback mechanisms rely on the resident to initiate feedback, which creates a self-selection bias. The City receives feedback only from those residents who are motivated enough to initiate the feedback process. Because these residents tend to be those who are either very pleased or very displeased with the service they have received, their collective opinions are not necessarily representative of the City's resident population as a whole.

PURPOSE OF STUDY The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and provide the City with a *statistically reliable* understanding of its residents' satisfaction, priorities, and concerns as they relate to services and facilities provided by the City. Ultimately, the survey results and analyses presented in this report will provide Council and staff with information that can be used to make sound, strategic decisions in a variety of areas including service improvements and enhancements, measuring and tracking internal performance, budgeting, policy, and planning. To assist in this effort, the City selected True North Research to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Identify key issues of importance for residents, as well as their perceptions of the quality of life in San Carlos;
- Measure residents' overall satisfaction with the City's efforts to provide municipal services, and their satisfaction with a variety of specific services;
- Gather opinions on topics such as biking in San Carlos, development, housing, economic development, and COVID-19 impacts;
- Evaluate perceptions of local government and customer service;
- Determine satisfaction with and perceived effectiveness of the City's communication with residents; *and*
- Collect additional background and demographic data that are relevant to understanding residents' perceptions, needs, and interests.

1. Source: State of California, Department of Finance, E-1City/County Population Estimates, January 2020.

This is not the first statistically reliable community survey conducted for the City of San Carlos. Similar studies were conducted in 2012, 2014, 2016, 2018, and 2020, and many of the questions included in the 2021 survey were purposefully tracked from the prior studies. However, as discussed in the 2014 final report, methodological changes implemented in the 2014 survey limit comparisons to the 2012 study. Thus, in this report, the results of the current survey are compared with the results of identical questions from 2014 and beyond, where appropriate.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 58). In brief, the survey employed a combination of mailed invitations, emailed invitations, and phone calls to recruit participation in the survey from a random selection of San Carlos households. Households were assigned a unique passcode, ensuring that only San Carlos households could participate in the survey, and that the survey could be completed only one time per passcode. During the data collection period, which lasted from January 7 to January 25, 2021, a total of 720 residents participated in the survey by phone or online at a secure, password-protected website.

STATISTICAL SIGNIFICANCE As discussed above, many of the figures and tables in this report present the results of questions asked in 2021 alongside the results found in the 2014, 2016, 2018, and 2020 surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in public opinion from the last survey (2020) to the current survey (2021)—as opposed to being due to chance associated with independently selected samples. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion between the two studies. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2021.

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 sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. 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 61), 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 survey and for contributing valuable input during the design stage of this study. City staff's collective experience, insight, and local knowledge 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 1,000 survey research studies for public agencies—including more than 400 studies for California municipalities and special districts.

Just the Facts

The following is an outline of the main factual 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.

QUALITY OF LIFE

- Nine-in-ten residents in 2021 shared favorable opinions of the quality of life in San Carlos, with 41% reporting it is excellent and 50% stating it is good. Eight percent (8%) of residents indicated the quality of life in the City is fair, whereas 2% used poor or very poor to describe the quality of life in the City.
- When asked what changes the City could make to improve the quality of life in San Carlos, approximately one-in-five (18% of) respondents were either unsure of a change that would make San Carlos a better place to live (12%) or indicated they desired no changes from the City (6%)—both of which are indicative of a respondent who does not perceive any pressing issues or problems in the City that can be addressed by local government.
- Among specific changes desired, the most common were limiting growth and development (18%), reducing traffic congestion (13%), improving and addressing parking issues (8%), providing affordable housing (7%), improving public safety (7%), and adding and improving sidewalks and bike lanes (6%).

CITY SERVICES

- Eighty-two percent (82%) of San Carlos residents indicated they were either very satisfied (32%) or somewhat satisfied (50%) with the City's efforts to provide municipal services. Approximately 13% of respondents indicated that they were dissatisfied with the City's overall performance, and an additional 5% indicated that they were unsure or unwilling to share their opinion.
- Among 22 specific service areas tested, San Carlos residents rated public safety and public works services as the most important. More specifically, providing fire protection, prevention, and emergency medical services (96% extremely or very important), maintaining a low crime rate (93%), preparing the City for fire, police and public works emergencies (92%), providing trash collection and recycling services (91%), providing safe streets (90%), and maintaining local streets (89%) received the highest importance ratings from residents.
- The survey also asked about satisfaction with the City's efforts to provide each of the same 22 services. Respondents were most satisfied with efforts to provide library services (95% very or somewhat satisfied), followed by provide trash collection and recycling services (94%), keep public buildings and facilities clean and attractive (93%), provide fire protection, prevention, and emergency medical services (93%), provide recreation programs for adults and seniors (92%), and hold special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk, and others (91%).

BIKING IN SAN CARLOS

- A majority of residents (56%) indicated in the 2021 survey that it is generally safe to ride a bike on city streets in San Carlos, which represents a statistically significant increase of 11% when compared to the 2020 survey findings. Approximately one-quarter (26%) felt in 2021 that riding a bike on city streets is unsafe, whereas 18% were unsure or preferred to not share their opinion.

- When asked if they personally had used the bike loops established by the City to bike or walk on the weekends, nearly one-in-five respondents (17%) answered in the affirmative.

LOCAL GOVERNANCE & CUSTOMER SERVICE

- Overall, 79% of residents agreed that the City manages its finances well, 78% said that they trust the City of San Carlos, 68% felt the City is responsive to residents' needs, and 62% agreed that the City listens to residents when making important decisions.
- Eleven percent (11%) of respondents in 2021 claimed they are very attentive to matters of local government, 47% somewhat attentive, and 34% slightly attentive. An additional 8% of respondents confided that they do not pay any attention to the activities of the City of San Carlos or were not sure.
- Just over one-in-three respondents (36%) indicated they had been in contact with city staff in the 12 months preceding the interview.
- San Carlos residents rated city staff high on all three customer-service dimensions tested, with approximately nine-in-ten residents rating staff as very or somewhat professional (89%) and accessible (89%) and approximately eight-in-ten rating staff as helpful (78%).

COMMUNICATION

- Overall, 82% of respondents indicated they were satisfied with the City's efforts to communicate with residents through newsletters, the Internet, television, and other means. The remaining respondents were either dissatisfied with the City's efforts in this respect (12%) or unsure of their opinion (6%).
- The most frequently-cited source for city information was city newsletters/Good Living community newsletter, mentioned by 64% of respondents. The City's newsletters were followed by Nextdoor (28%), the City's website (25%), email notifications from the City (21%), and postcards, letters, flyers or brochures mailed to their home (17%).
- Respondents indicated that email and e-notifications was the most effective method for the City to communicate with them (88% very or somewhat effective), followed by postcards, letters, and newsletters mailed to the home (86%), the City's website (76%), and social media like Facebook, Twitter, and Nextdoor (66%).

DEVELOPMENT & HOUSING

- Approximately half of respondents felt there was too little housing in San Carlos that is affordable for middle-income families (54%) and low-income families (48%).
- Although the dominant answer for the remaining housing types tested was that the current amount is *about right*, the percentage who felt there was not enough accessory dwelling units (32%), interim housing for people transitioning from homelessness (32%), special needs housing for families and individuals who need support services like job training and social services (29%), and senior housing (26%) was much higher than the percentage who felt there was already too much of each type of housing in San Carlos.
- When compared to the other types of housing mentioned above, fewer respondents felt there is currently not enough supply of condominiums (12%), apartments with seven or more units (12%), single family homes (13%), townhomes (17%), and apartments with six units or less (18%) in San Carlos.

- Less than half (49%) of those surveyed in 2021 felt the pace of development in San Carlos during the past three years to be too fast, a statistically significant decrease from the 2020 survey results. Approximately one-third (34%) felt the pace of development has been about right during the past three years, whereas 9% felt that the City has grown too slowly and an additional 9% of respondents were unsure or unwilling to share their opinion on this matter.

FUNDING PRIORITIES

- When asked to prioritize among 12 projects and programs that could receive funding in the future, fire protection services (96% high or medium priority), infrastructure maintenance and repair (92%), street maintenance and repair (91%), and police services (88%) were the clear top priorities.
- Second tier priorities included park and landscape maintenance (81%), environmental sustainability/green programs (66%), recreation programs and services (65%), bicycle and pedestrian access/improvements (60%), public transportation (58%), and housing programs (56%).
- When compared to the other projects and services tested, fewer residents rated community events and activities (50%) and community outreach including meetings and mailings (52%) as a high or medium priority for future city spending.

LOCAL BUSINESSES

- Approximately 36% of respondents indicated that they spend *at least half* of their household's retail shopping dollars within the City of San Carlos, with 8% spending at least 80% of their dollars within the City and 28% spending between 50% and 79% of their retail dollars in San Carlos. The majority of households (53%) reported they spend less than half of their retail shopping dollars locally in San Carlos and an additional 11% of respondents were unsure or declined to state.
- Approximately one-third (32%) of residents reported that they had reduced the percentage of their total shopping dollars spent in San Carlos since the pandemic started. However, this decline was offset by 29% reporting they increased their local shopping during the same period, and 36% reporting that the percentage of their retail dollars spent locally had not changed.
- When residents who reported that they spend less than 30% of their retail shopping dollars in San Carlos and/or decreased the percentage of their local spending in the past year were subsequently asked if there was a specific action the City could take that would prompt them to do more of their shopping in San Carlos, the most common suggestions were providing a greater variety of restaurants and shops (20%), ending pandemic restrictions/opening local businesses (12%), providing more parking (9%), continuing practices to ensure safety during the pandemic including social distancing and masks (7%), keeping Laurel Street closed to vehicle traffic or making it a one-way street after the pandemic (3%), and improving *local* online shopping opportunities (3%).

COVID-19 IMPACTS

- Nearly two-thirds (64%) of respondents indicated that at least one member of their household had switched from commuting to work to primarily working from home during the past year.

- Approximately one-quarter of respondents (24%) reported that they and/or another member of their household had their work hours or salary reduced during the pandemic, while 15% also reported that they and/or another member of their household had been laid-off or furloughed.
- Most San Carlos residents (66%) indicated that their household's financial situation had not been impacted by the pandemic—it had stayed about the same. Approximately 10% indicated that the pandemic had improved their household's financial situation, whereas one-in-five (21%) reported that their household's financial situation had worsened during this period. An additional 3% preferred to not answer the question.
- More than half of those with a child under 13 in their household (53%) indicated that they had searched for daycare services in San Carlos *prior* to the pandemic. Approximately one-in-five (22%) reported doing the same *during* the pandemic.
- Among those who had searched for suitable daycare services in San Carlos *prior* to the pandemic, three-quarters stated that it was difficult to find (27% very difficult, 47% somewhat difficult), whereas one-quarter indicated it was either somewhat easy (15%) or very easy (10%) to find.
- During the pandemic, eight-in-ten rated the challenge of finding suitable daycare in San Carlos as very difficult (37%) or somewhat difficult (42%), while the percentage who found it somewhat or very easy declined to less than one-in-five (17%).

CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide the City of San Carlos with a statistically reliable understanding of the opinions, priorities, and concerns of San Carlos residents. Operating from the philosophy that you can't manage what you don't measure, the City has regularly used the survey as a community needs assessment and performance measurement tool. In short, the study presents an opportunity to profile residents' needs and priorities, measure how well the City is performing in meeting these needs through existing services and facilities, and gather data on a variety of quality-of-life, issue, and policy-related matters. More than just a profiling exercise, the City uses the information gained from the studies to adjust and improve its services and policies—all toward the goal of building and sustaining a high level of community satisfaction.

Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the survey results answer key questions that motivated the research. The following conclusions are based on True North's interpretations of the results, as well as the firm's experience conducting similar studies for government agencies throughout the State.

How well is the City performing in meeting the needs of San Carlos residents?

The period of time between the *2020 Community Opinion Survey* and the current study was punctuated by difficult and dramatic events in San Mateo County including large-scale wildfires, the COVID-19 pandemic, and the shuttering of non-essential businesses to curb the spread of the disease. Against this turbulent backdrop, residents' opinions of their community and city government remained remarkably stable. San Carlos residents continue to be quite satisfied with the City's efforts to provide municipal services and facilities, and the quality of life in the City.

More than eight-in-ten residents surveyed (82%) indicated they were satisfied with the City's overall efforts to provide municipal services, virtually identical to the figure recorded prior to the pandemic in 2020 (83%). The high level of satisfaction expressed with the City's performance *in general* was also mirrored in residents' assessments of the City's performance in providing most specific services, with the highest satisfaction scores assigned to the City's efforts to provide library services (95% very or somewhat satisfied), provide trash collection and recycling services (94%), keep public buildings and facilities clean and attractive (93%), provide fire protection, prevention, and emergency medical services (93%), provide recreation programs for adults and seniors (92%), and hold special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk, and others (91%) (see *Specific Services* on page 16).

For 16 of the 22 service areas tested, the City is meeting or exceeding the needs and expectations of at least three-quarters of its residents—and for the majority of services the City is meeting the needs of more than 83% of residents (see *Performance Needs & Priorities* on page 22). It is also noteworthy that with the establishment of bike loops, the percentage who say that it is safe to ride a bike on city streets in San Carlos increased 11% in the past year (see *Biking in San Carlos* on page 25).

Similar to the high levels of satisfaction expressed with respect to the City's overall performance in providing services, San Carlos residents also continue to hold very high opinions of the quality of life in the City. Nine-in-ten residents surveyed rated the quality of the life in San Carlos as excellent or good. Moreover, this sentiment was widespread, with at least 85% of respondents in every identified resident subgroup rating the quality of life in San Carlos as excellent or good (see *Quality of Life* on page 12).

How is the City perceived with respect to governance?

Although much of the survey focused on residents' satisfaction with the City's efforts to provide specific services, as with other progressive cities San Carlos recognizes there is more to good local governance than simply providing satisfactory services. Do residents perceive that the City is accessible and responsive to residents' needs? Do residents feel that staff serves their needs in a professional manner? How well do residents trust the City, and do they view the City as fiscally responsible? Answers to questions like these are as important as service or policy-related questions in measuring the City's performance in meeting residents' needs.

Among those with an opinion, the City was rated highest with regard to managing its finances well (79% strongly or somewhat agreed with the statement 'The City manages its finances well'), followed by resident trust (78%), being responsive to residents' needs (68%), and listening to residents when making important decisions (62%).

Additionally, when those who had contact with the City during the 12 months prior to the survey were asked to comment on staff's performance, staff received high marks for being accessible, professional, and helpful (see *Local Governance & Customer Service* on page 28).

Where should the City focus its efforts in the future?

In addition to measuring the City's current performance, a key goal of this study is to look *forward* and identify opportunities to adjust services, improve facilities, and/or refine communications strategies to best meet the community's evolving needs and expectations. Although resident satisfaction in San Carlos is high (see above), there is always room for improvement. Below we note some of the areas that present the best opportunities in this regard.

Considering respondents' verbatim answers regarding what they feel city government could do to make San Carlos a better place to live (see *Ways to Improve Quality of Life* on page 13), the list of services and their respective priority status for future city attention (see *Performance Needs & Priorities* on page 22), and the manner in which residents prioritize among potential funding areas (see *Funding Priorities* on page 42), the top priorities are: providing fire protection services, repairing/maintaining streets and infrastructure, providing police services, providing affordable housing while limiting growth and development, reducing traffic congestion, and providing additional public parking downtown.

With the recommendation that the City focus on these areas, it is equally important to stress that when it comes to improving satisfaction in service areas, the appropriate strategy is often a combination of better communication and actual service improvements. It may be, for example, that many residents are simply not aware of the City's ongoing infrastructure improvement efforts, or the limits of what a city can do to reduce traffic congestion. Choosing the appropriate balance of actual service improvements and efforts to raise awareness on these matters will be a key to maintaining and improving the community's overall satisfaction in the short- and long-term.

It is also important to keep in mind that although these areas represent opportunities to improve resident satisfaction, the City should *not* oversteer. Indeed, the primary takeaway from this study is that the City does many things very well, and the emphasis should be on continuing to perform at that high level in those areas. The vast majority of residents were pleased with the City's efforts to provide services, programs, and facilities and have a favorable opinion of the City's performance in most areas. The *top priority* for the City should thus be to do what it takes to maintain the high quality of services that it currently provides.

How has the pandemic impacted residents of San Carlos?

Although residents' high opinions of the quality of life in San Carlos and the City's performance in providing services have remained stable over the past year, the survey results reveal that the pandemic has had its impacts on the community. Nearly two-thirds of respondents revealed that one or more members of their household have switched from commuting to work to primarily working from home. Approximately one-quarter of households also experienced reductions in work hours or salary associated with the pandemic, while 15% experienced lay-offs or employment furloughs during this period. Approximately one-in-five residents reported that their financial situation has worsened during the pandemic, and those looking for suitable child daycare in San Carlos report that it is somewhat harder to find now than it was prior to the pandemic (see *COVID-19 Impacts* on page 51).

The impacts of the pandemic have not been felt evenly across the community. When compared to homeowners, those who rent their residence in San Carlos were more likely to experience reductions to their hours or salary during the pandemic, as well as layoffs. The same is true for households with a teenager and those who indicated their financial situation worsened with the pandemic. It is worth noting that a household's financial situation during the pandemic was correlated with a need for daycare, with households that experienced financial hardship during the pandemic also being more likely to have searched for daycare in San Carlos both before and during the pandemic.

How well is the City communicating with San Carlos residents?

The past few years have witnessed a shift in communication preferences, particularly among older residents. Whereas in the past there was a strong preference for printed forms of communication among older residents, while younger residents gravitated toward digital sources, these differences have eroded over time. In the 2021 community survey, email and e-notifications were not only perceived to be the most effective method of city-resident communication overall, they were also the preferred option in *every* age cohort. In other words, even among seniors, email and e-notifications were viewed as more effective than postcards, letters, and newsletters mailed to their home (direct mail).

That is not to say that direct mail is unpopular—it is second on the list in terms of perceived effectiveness overall, and is in the top-three most effective methods in *every* age group. It is simply to point out that the digital divide in terms of city-resident communications is not nearly as pronounced as it has been in the past, and we expect that the trend will continue in other areas where (currently) there are still differences in use by age (e.g., social media and the City's website).

With the ground constantly shifting beneath its feet, the City has been nimble enough to adapt and continue to meet residents' needs with respect to City-resident communications. Whereas many cities have witnessed a significant decline in satisfaction with city-resident communications over the past decade, San Carlos has managed to keep the overall satisfaction level between 82% and 85% dating back to the first survey in 2014. The fact that San Carlos residents primarily rely on *city-sponsored* sources of information to find out about San Carlos news, events, and programming—including the Good Living newsletter, direct mail, email, and the City's website—is undoubtedly one of the reasons for this stability in satisfaction over the past seven years (see *Communication* on page 33).

Although San Carlos has been successful in maintaining a high level of resident satisfaction despite the proliferation of information sources and accelerating pace of change, it is important to recognize that the challenges will continue to change (and may continue to grow). To stay ahead of the curve, San Carlos, like other cities, should periodically conduct a careful review of its communications strategies and budget to ensure that both are evolving accordingly.

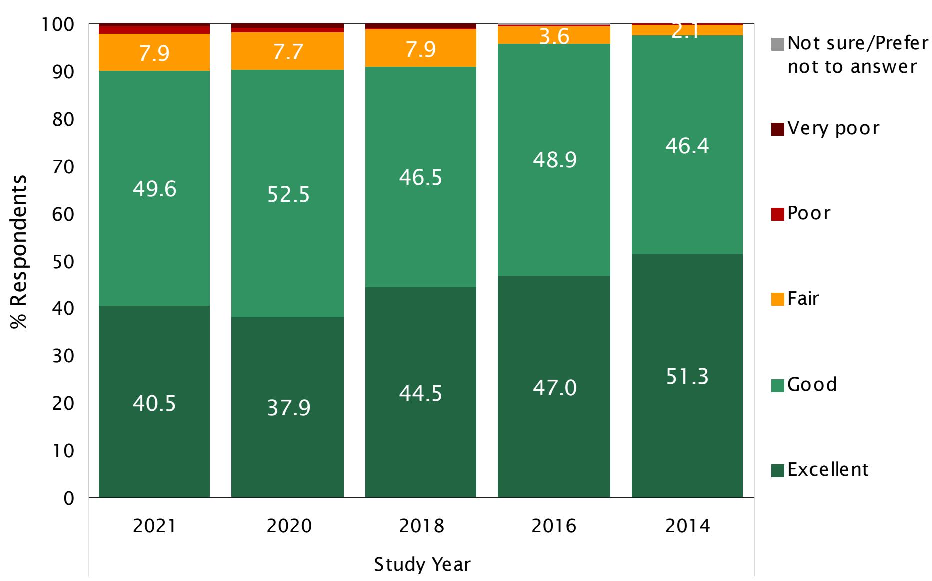
QUALITY OF LIFE

The opening series of questions in the 2021 survey was designed to assess residents' perceptions of the quality of life in San Carlos, as well as their ideas for what city government could do to improve the quality of life in the City, now and in the future.

OVERALL QUALITY OF LIFE At the outset of the survey, respondents were asked to rate the quality of life in the City using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 1 below, nine-in-ten residents in 2021 shared favorable opinions of the quality of life in San Carlos, with 41% reporting it is excellent and 50% stating it is good. Eight percent (8%) of residents indicated the quality of life in the City is fair, whereas 2% used poor or very poor to describe the quality of life in the City. Despite the pandemic's grip on the community since March 2020, were no statistically significant changes in the perceived quality of life in San Carlos during the past year.

Question 2 *How would you rate the overall quality of life in San Carlos? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 1 QUALITY OF LIFE BY STUDY YEAR



Figures 2 and 3 on the next page show how ratings of the quality of life in the City varied by years of residence in San Carlos, gender, presence of children in the home, age of the respondent, home ownership status, and the financial impact of the pandemic on the respondent's household. Even at the subgroup level, San Carlos residents shared positive assessments of the quality of life in the City, with ratings ranging from a low of 85% to a high of 96% across all subgroups.

FIGURE 2 QUALITY OF LIFE BY YEARS IN SAN CARLOS, GENDER & CHILDREN IN HSLD

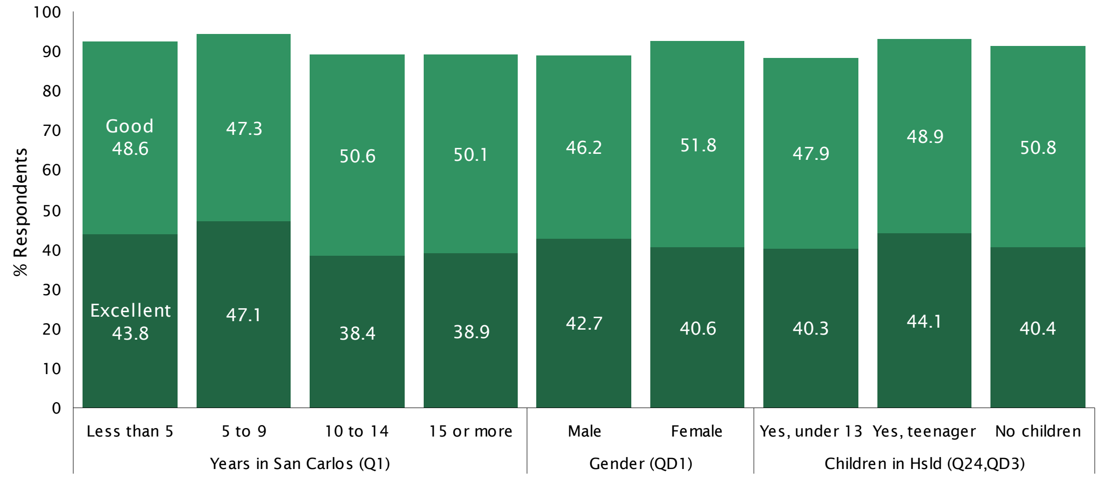
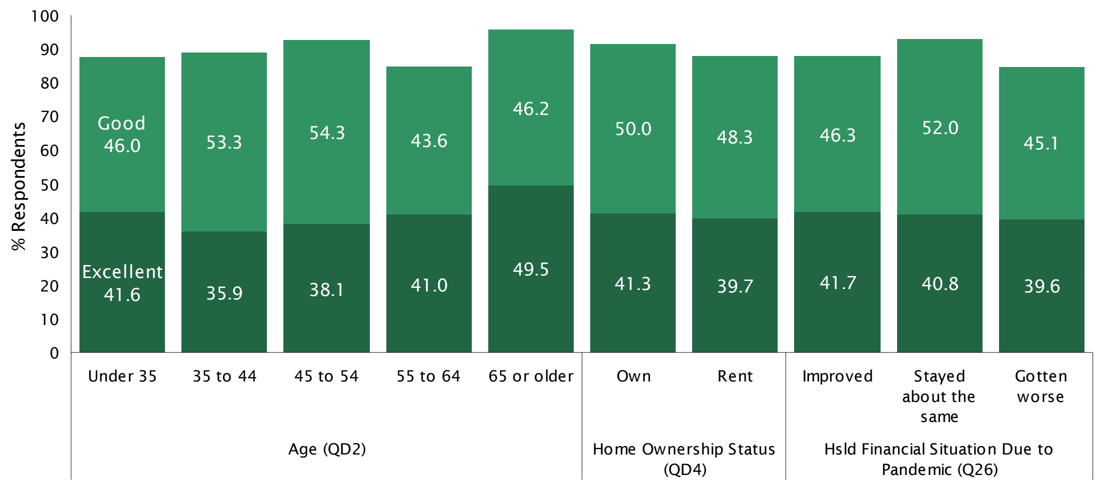


FIGURE 3 QUALITY OF LIFE BY AGE, HOME OWNERSHIP STATUS & HSLD FINANCIAL SITUATION DUE TO PANDEMIC



WAYS TO IMPROVE QUALITY OF LIFE Respondents were next asked to indicate one thing that city government could change to make San Carlos a better place to live, now and in the future. This question was asked in an open-ended manner, allowing respondents to mention any improvement that came to mind without being prompted by or restricted to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 4 on the next page.

Nearly one-in-five (18% of) respondents were either unsure of a change that would make San Carlos a better place to live (12%) or indicated they desired no changes from the City (6%)—both of which are indicative of a respondent who does not perceive any pressing issues or problems in the City that can be addressed by local government. Among specific changes mentioned, the most common were limiting growth and development (18%), reducing traffic congestion (13%), improving and addressing parking issues (8%), providing affordable housing (7%), improving public safety (7%), and adding and improving sidewalks and bike lanes (6%). No other individual categories of improvement were mentioned by at least 5% of respondents, respectively.

Question 3 *If the City government could change one thing to make San Carlos a better place to live now and in the future, what change would you like to see?*

Figure 4 Changes to Improve San Carlos

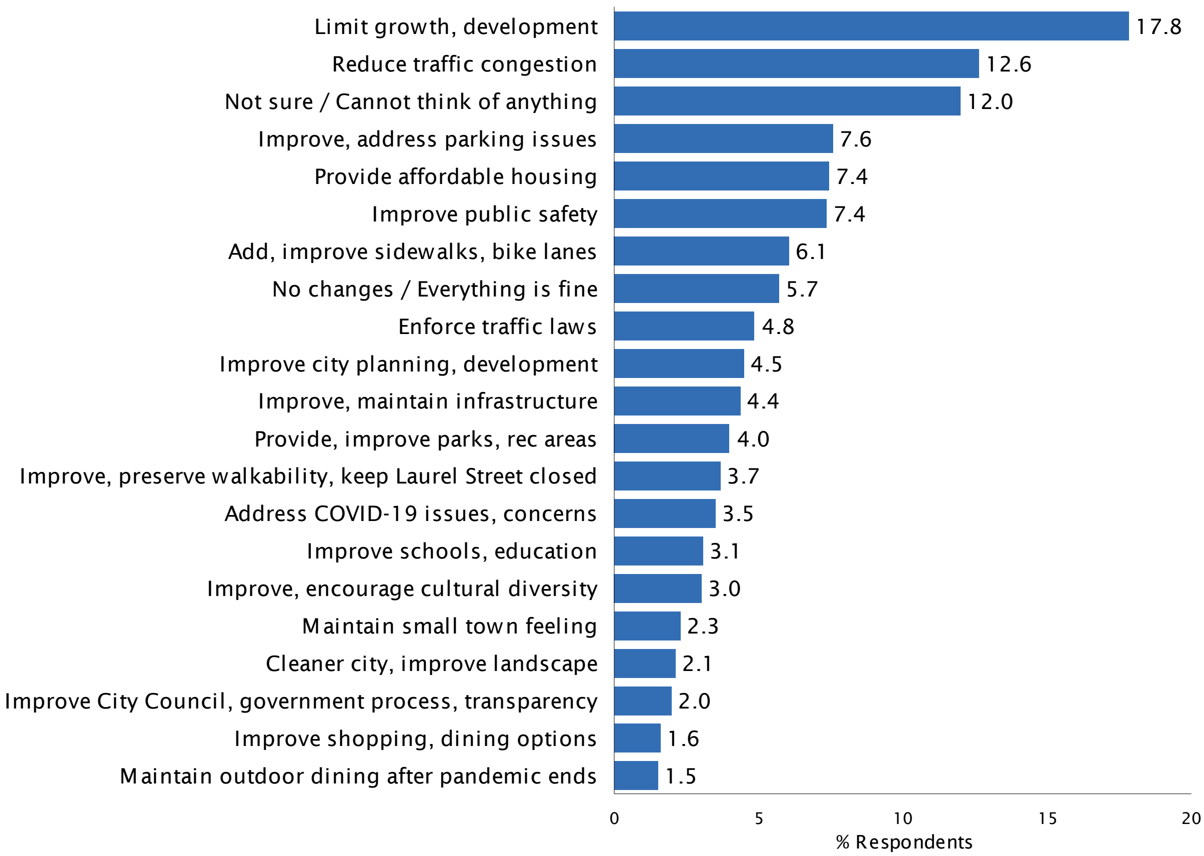


Table 1 presents the top five responses to this question from the past five study years. Limiting growth and development has remained the most suggested improvement since 2016, and improving and addressing parking issues and reducing traffic congestion were among the top five mentions in each of the previous four studies. Providing affordable housing reached the top five for the first time in 2020 and remained there in the current study.

Table 1 Top Changes to Improve San Carlos by Study Year

Study Year				
2021	2020	2018	2016	2014
Limit growth, development	Limit growth, development	Limit growth, development	Limit growth, development	Improve, address parking issues
Reduce traffic congestion	Reduce traffic congestion	Improve, address parking issues	Reduce traffic congestion	Reduce traffic congestion
Not sure / Cannot think of anything	Improve, address parking issues	Reduce traffic congestion	Improve, address parking issues	No changes needed
Improve, address parking issues	Provide affordable housing	Not sure / Can't think of anything	Not sure / Can't think of anything	Not sure / Can't think of anything
Provide affordable housing	Not sure / Can't think of anything	Improve, maintain infrastructure	Improve public safety	Improve schools, education

City Services

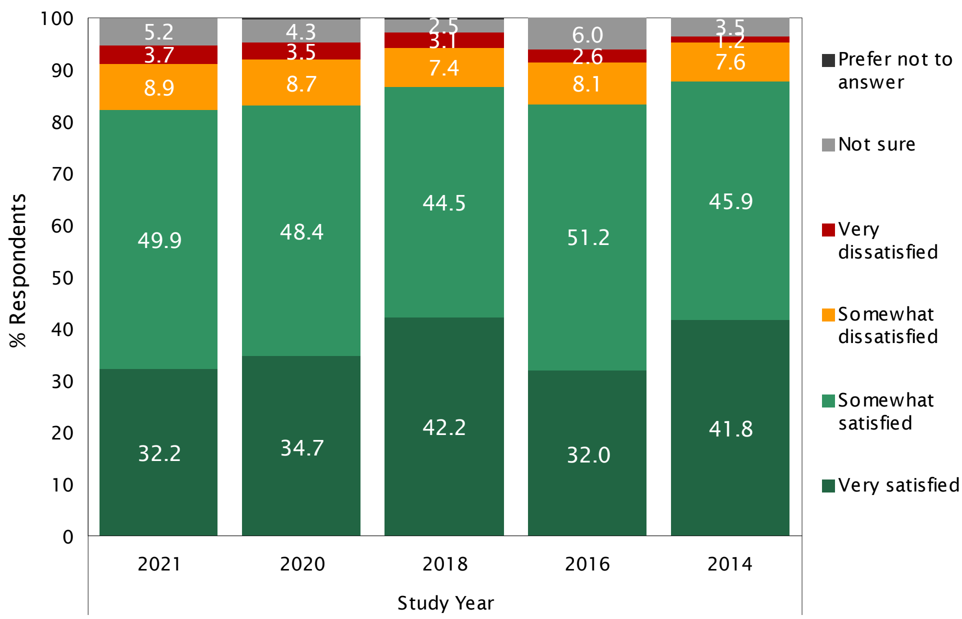
After measuring respondents' perceptions of the quality of life in San Carlos, the survey next turned to assessing opinions about the City's performance in providing municipal services.

OVERALL SATISFACTION The first question in this series asked respondents to indicate if, overall, they were satisfied or dissatisfied with the job the City of San Carlos is doing to provide services. Because this question does not reference a specific program, facility, or service and requested that the respondent consider the City's performance in general, the findings of this question may be regarded as an *overall performance rating* for the City.

As shown in Figure 5, 82% of San Carlos residents indicated they were either very satisfied (32%) or somewhat satisfied (50%) with the City's efforts to provide municipal services. Approximately 13% of respondents indicated that they were dissatisfied with the City's overall performance, and an additional 5% indicated that they were unsure or unwilling to share their opinion. There were no statistically significant changes between the 2020 and 2021 survey results.

Question 4 *Next, I would like to ask a series of questions about services provided by the City of San Carlos. Generally speaking, are you satisfied or dissatisfied with the job the City of San Carlos is doing to provide city services?*

FIGURE 5 OVERALL SATISFACTION BY STUDY YEAR



Figures 6 and 7 on the next page display how the percentage of respondents satisfied with the City's overall performance varied across demographic subgroups. Although there was some variation in opinions across subgroups, the dominant pattern is one of *consistency*. With the exception of residents under 35 years of age (74%), more than eight-in-ten residents in every identified subgroup said they were satisfied with the City's overall performance in providing municipal services.

FIGURE 6 OVERALL SATISFACTION BY YEARS IN SAN CARLOS, GENDER & CHILDREN IN HSLD

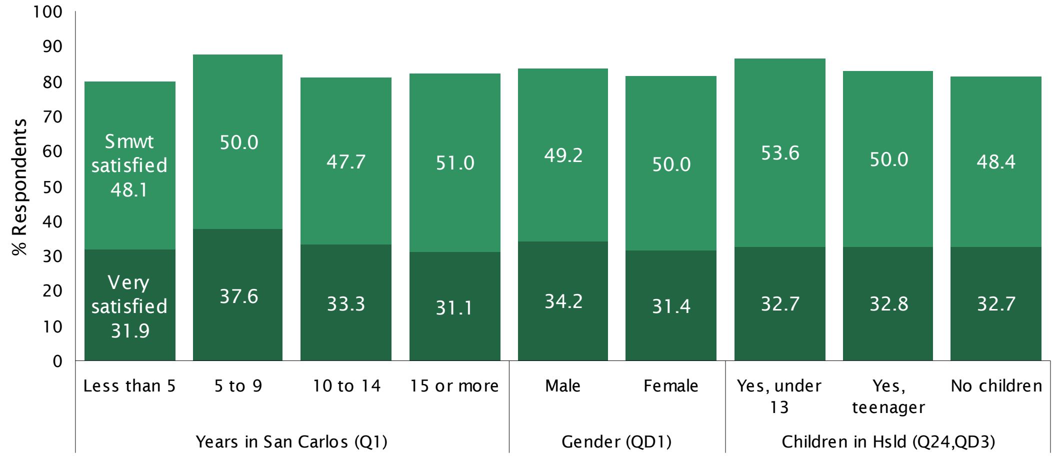
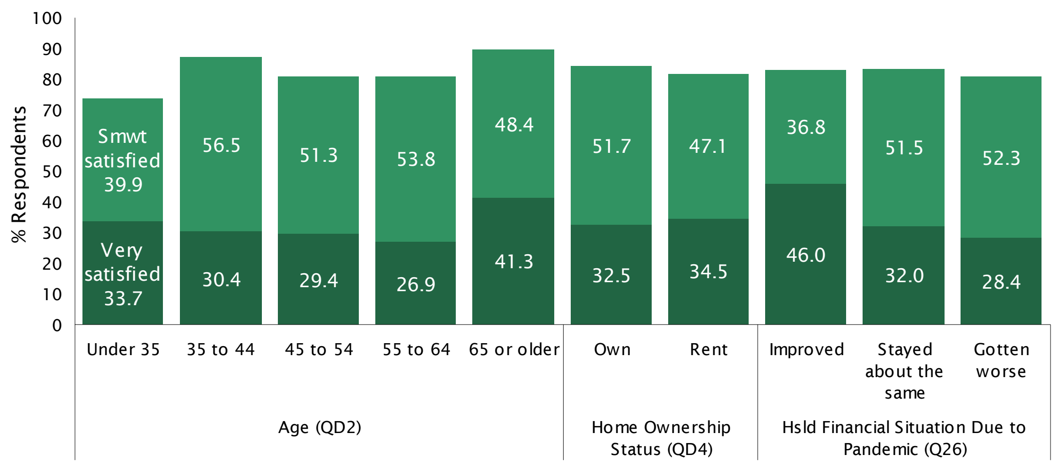


FIGURE 7 OVERALL SATISFACTION BY AGE, HOME OWNERSHIP STATUS & HSLD FINANCIAL SITUATION DUE TO PANDEMIC



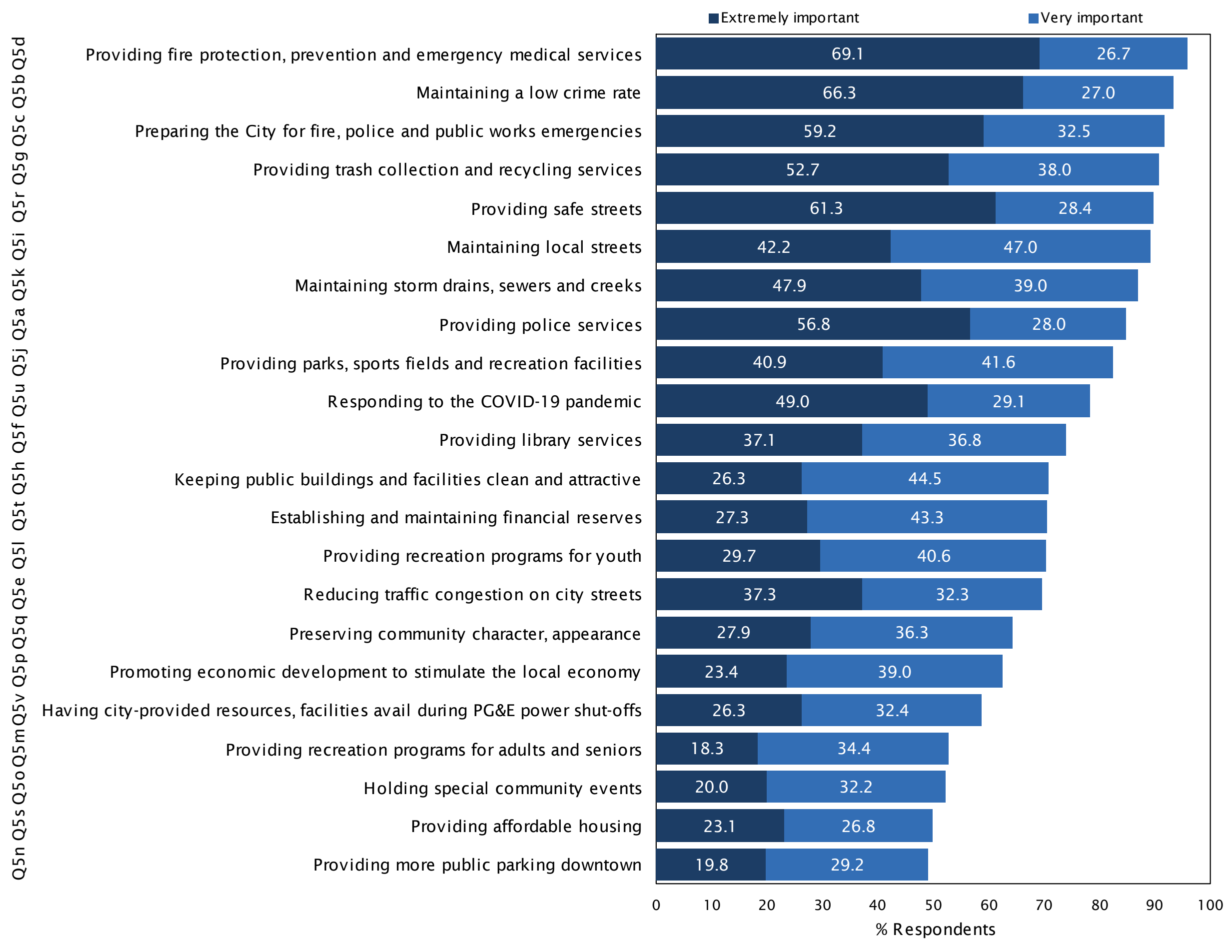
SPECIFIC SERVICES Whereas Question 4 addressed the City's *overall* performance, the next two questions asked respondents to rate the importance of *specific* services offered by the City, as well as their level of satisfaction with efforts to provide these services. For each service, respondents were first asked if they thought a service was extremely important, very important, somewhat important, or not at all important. The order of the items was randomized for each respondent to avoid a systematic position bias.

Figure 8 on the next page presents the services sorted by order of importance according to the percentage of respondents who rated a service as *at least* very important. In line with past studies, San Carlos residents once again rated public safety and public works services as the most important. More specifically, providing fire protection, prevention, and emergency medical services (96% extremely or very important), maintaining a low crime rate (93%), preparing the City for fire, police and public works emergencies (92%), providing trash collection and recycling services (91%), providing safe streets (90%), and maintaining local streets (89%) received the highest importance ratings from residents.

At the other end of the spectrum, providing more parking downtown (49%), providing affordable housing (50%), holding special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk, and others (52%), and providing recreation programs for adults and seniors (53%) were viewed as less important.

Question 5 *For each of the services I read, please tell me whether the service is extremely important to you, very important, somewhat important, or not at all important.*

FIGURE 8 IMPORTANCE OF SERVICES



For the interested reader, Table 2 on the next page displays the percentage of respondents who viewed each service as extremely or very important from 2014 to 2021, as well as the difference from 2020 to 2021. Over the past year, three services exhibited statistically significant *increases* in importance (promoting economic development, providing recreation programs for youth, and providing parks, sports fields and recreation facilities) while three others were rated as significantly less important (providing more public parking downtown, reducing traffic congestion on city streets, and providing safe streets).

TABLE 2 IMPORTANCE OF SERVICES BY STUDY YEAR[2]

	Study Year 2021	2020	2018	2016	2014	Change in Extremely + Very Important 2020 to 2021
Promoting economic development to stimulate the local economy	62.4	48.3	52.1	59.5	68.5	+14.2†
Providing recreation programs for youth	70.3	65.2	70.0	68.8	68.6	+5.1†
Providing parks, sports fields and recreation facilities	82.5	77.5	79.9	82.9	78.8	+5.0†
Holding special community events	52.2	47.6	51.0	56.8	58.3	+4.6
Establishing and maintaining financial reserves	70.6	67.5	N/A	N/A	N/A	+3.1
Preparing the City for fire, police and public works emergencies	91.6	88.6	86.0	85.7	84.6	+3.0
Providing affordable housing	49.9	47.0	N/A	N/A	N/A	+2.9
Providing fire protection, prevention and emergency medical services	95.9	95.0	92.6	94.9	96.8	+0.8
Providing recreation programs for adults and seniors	52.7	51.9	49.7	54.6	N/A	+0.8
Providing trash collection and recycling services	90.6	90.0	90.5	90.6	89.7	+0.7
Providing library services	73.9	73.9	75.1	77.0	73.6	+0.0
Maintaining local streets	89.2	89.4	88.9	91.2	93.6	-0.1
Maintaining a low crime rate	93.2	93.6	93.1	96.0	95.5	-0.4
Maintaining storm drains, sewers and creeks	86.9	87.6	92.4	89.5	91.5	-0.7
Keeping public buildings and facilities clean and attractive	70.8	71.8	70.3	74.5	76.6	-1.0
Providing police services	84.8	88.2	91.1	91.5	93.2	-3.4
Preserving community character, appearance	64.2	67.7	64.5	72.3	66.0	-3.4
Providing safe streets	89.7	95.5	N/A	N/A	N/A	-5.8†
Reducing traffic congestion on city streets	69.6	77.3	79.5	N/A	N/A	-7.7†
Providing more public parking downtown	49.0	58.2	63.4	N/A	N/A	-9.2†
Responding to the COVID-19 pandemic	78.2	N/A	N/A	N/A	N/A	N/A
Having city-provided resources, facilities avail during PG&E power shut-offs	58.7	N/A	N/A	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2020 and 2021 studies.

Turning to the satisfaction component, Figure 9 on the next page sorts the same list of services according to the percentage of respondents who indicated they were either very or somewhat satisfied with the City's efforts to provide the service. For comparison purposes between the services, only respondents who held an opinion (satisfied or dissatisfied) are included in the figure. Those who did not have an opinion were removed from this analysis. The percentage of respondents who provided an opinion (satisfied or dissatisfied) is presented in brackets beside the service label in the figure, while the bars represent the answers of those with an opinion.

At the top of the list, respondents were most satisfied with the City's efforts to provide library services (95% very or somewhat satisfied), followed by provide trash collection and recycling services (94%), keep public buildings and facilities clean and attractive (93%), provide fire protection, prevention, and emergency medical services (93%), provide recreation programs for adults and seniors (92%), and hold special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk, and others (91%). Respondents were comparatively less satisfied with the City's efforts to provide affordable housing (48%) and reduce traffic congestion on city streets (53%).

2. *Preparing the City for fire, police, and public works emergencies* was previously worded as *Preparing the City for emergencies.*

Question 6 *For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the city is doing to provide the service. Are you satisfied or dissatisfied with the city's efforts to: _____, or do you not have an opinion?*

FIGURE 9 SATISFACTION WITH SERVICES

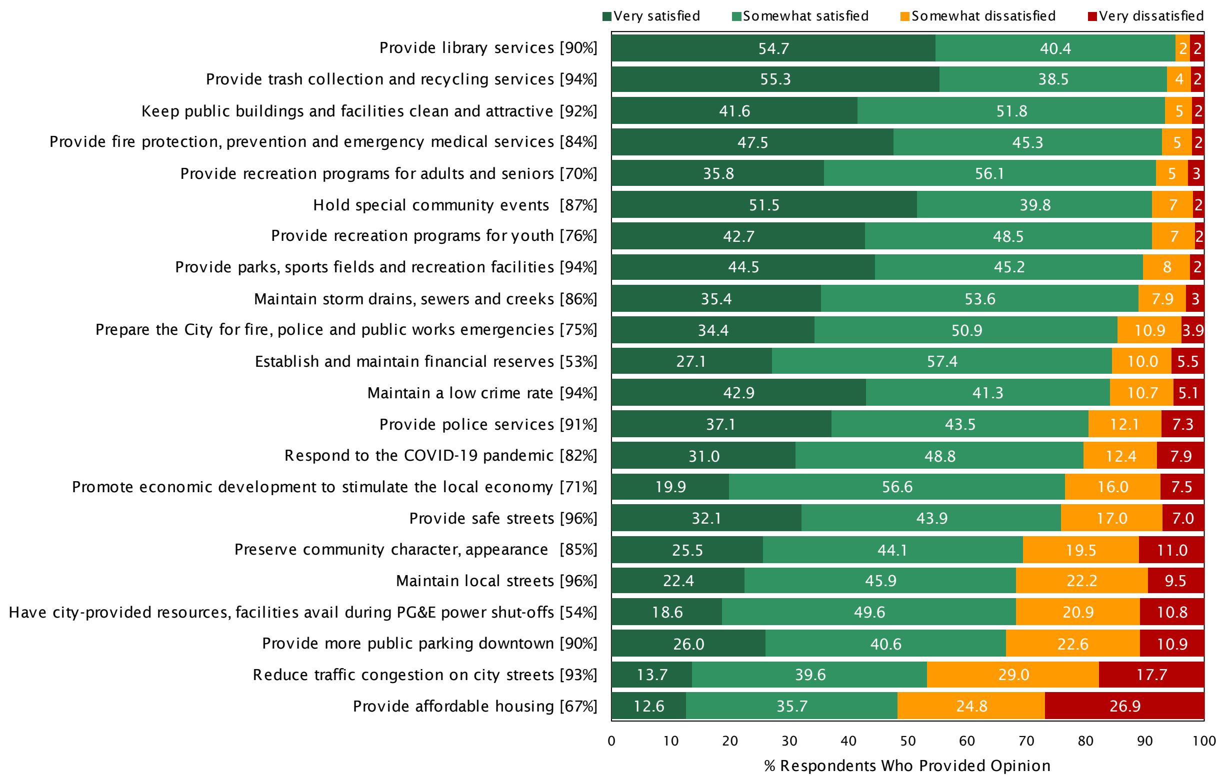


Table 3 on the next page displays the percentage of respondents who were satisfied with each service from 2014 to 2021, as well as the difference in satisfaction between the 2020 and 2021 studies. As shown in the right column, most services experienced small and statistically insignificant changes in satisfaction between 2020 and 2021. Respondents expressed statistically significant *increases* in satisfaction with the City's efforts to reduce traffic congestion on city streets (+15%) and provide more public parking downtown (+7%) between 2020 and 2021, whereas satisfaction with the City's efforts to provide safe streets (-5%) and hold special community events (-4%) declined during the same period.

TABLE 3 SATISFACTION WITH SERVICES BY STUDY YEAR

	Study Year 2021	2020	2018	2016	2014	Change in Satisfaction 2020 to 2021
Reduce traffic congestion on city streets	53.3	38.1	41.0	N/A	N/A	+15.2†
Provide more public parking downtown	66.6	59.8	44.6	N/A	N/A	+6.8†
Provide affordable housing	48.3	45.0	N/A	N/A	N/A	+3.3
Maintain storm drains, sewers and creeks	89.0	88.0	89.3	87.3	89.2	+1.0
Keep public buildings and facilities clean and attractive	93.5	92.8	95.7	93.2	98.5	+0.6
Provide recreation programs for adults and seniors	91.9	91.3	94.3	90.8	N/A	+0.6
Preserving community character, appearance	69.5	69.5	74.9	76.4	82.6	+0.0
Provide parks, sports fields and recreation facilities	89.7	89.9	90.9	88.1	87.9	-0.2
Provide trash collection and recycling services	93.7	94.9	95.2	94.7	90.5	-1.2
Provide library services	95.1	96.3	97.5	97.8	96.7	-1.2
Provide fire protection, prevention and emergency medical services	92.9	94.2	95.8	95.9	96.4	-1.3
Maintain a low crime rate	84.2	85.9	90.8	76.6	86.6	-1.7
Maintain local streets	68.3	70.0	74.2	71.6	78.3	-1.8
Establish and maintain financial reserves	84.5	86.7	N/A	N/A	N/A	-2.2
Prepare the City for emergencies	85.3	87.5	88.6	87.9	91.0	-2.2
Provide recreation programs for youth	91.2	93.9	94.7	96.2	95.8	-2.6
Promote economic development to stimulate the local economy	76.5	79.3	82.2	81.3	82.3	-2.8
Provide police services	80.6	84.3	89.4	83.4	91.1	-3.8
Holding special community events	91.3	95.7	96.5	96.3	95.4	-4.4†
Provide safe streets	75.9	81.3	N/A	N/A	N/A	-5.4†
Respond to the COVID-19 pandemic	79.7	N/A	N/A	N/A	N/A	N/A
Have city-provided resources, facilities avail during PG&E power shut-offs	68.3	N/A	N/A	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2020 and 2021 studies.

DIFFERENTIATORS OF OPINION For the interested reader, Table 4 displays how the level of satisfaction with each specific service tested in Question 6 varied according to residents' overall performance ratings for the City (see *Overall Satisfaction* on page 15). The table divides residents who were satisfied with the City's *overall performance* into one group and those dissatisfied into a second group. Also displayed is the difference between the two groups in terms of the percentage who indicated they were satisfied with the City's efforts to provide each service tested in Question 6 (far right column). For convenience, the services are sorted by that difference, with the greatest differentiators of opinion near the top of the table.

When compared with their counterparts, those satisfied with the City's performance in providing services *overall* were also more likely to express satisfaction with the City's efforts to provide each of the individual services tested in Question 6. With that said, the greatest specific differentiators of opinion between satisfied and dissatisfied residents were found with respect to the City's efforts to preserve community character and appearance, maintain local streets, reduce traffic congestion on city streets, and promote economic development to stimulate the local economy.

At the other end of the spectrum, there was much less difference between the two resident groups regarding their satisfaction with the City's efforts to provide affordable housing, provide parks, sports fields and recreation facilities, and provide library services.

TABLE 4 SATISFACTION WITH SERVICES BY OVERALL SATISFACTION WITH CITY

		Satisfaction With City's Overall Performance (Q4)		Difference Between Groups For Each Service
		Very or somewhat satisfied	Very or somewhat dissatisfied	
% Respondents Satisfied With Each Service	Preserve community character, appearance	75.1	28.3	46.8
	Maintain local streets	74.5	29.4	45.1
	Reduce traffic congestion on city streets	59.3	16.4	42.9
	Promote economic development to stimulate the local economy	81.8	43.5	38.4
	Respond to the COVID-19 pandemic	84.2	50.0	34.2
	Provide police services	84.6	52.9	31.7
	Provide safe streets	79.8	49.1	30.6
	Establish and maintain financial reserves	89.5	59.6	29.9
	Prepare the City for fire, police and public works emergencies	89.7	61.0	28.7
	Have city-provided resources, facilities avail during PG&E power shut-offs	73.0	45.4	27.6
	Provide more public parking downtown	70.4	44.8	25.7
	Maintain a low crime rate	87.6	62.7	24.9
	Maintain storm drains, sewers and creeks	91.4	70.9	20.5
	Hold special community events	93.7	73.9	19.8
	Keep public buildings and facilities clean and attractive	96.0	76.4	19.5
	Provide recreation programs for adults and seniors	93.8	77.8	16.0
	Provide fire protection, prevention and emergency medical services	94.7	80.9	13.8
	Provide trash collection and recycling services	95.5	82.5	13.0
	Provide recreation programs for youth	92.8	80.6	12.2
	Provide library services	96.4	85.0	11.4
	Provide parks, sports fields and recreation facilities	91.1	80.2	10.8
	Provide affordable housing	49.4	42.1	7.3

Performance Needs & Priorities

With a measure of the importance of a service to residents as well as a measure of satisfaction with the City's efforts to provide the service, True North is able to examine the relationship between these two dimensions and identify areas where the City has the greatest opportunities to improve resident satisfaction—and identify for which services the City is meeting, and even exceeding, the majority of residents' needs.

Rather than rely on *averages* to conduct this analysis, True North has developed an *individualized* approach to identifying priorities. This approach is built on the recognition that opinions will vary from resident to resident and that understanding this variation is required for assessing how well the City is meeting residents' needs.[3] Table 5 on the next page presents a grid based on the importance and satisfaction scales. The horizontal axis corresponds to the four *importance* options, and the vertical scale corresponds to the four *satisfaction* options. The 16 cells within the grid are grouped into one of six categories based on how well the City is meeting, or not meeting, a resident's needs for a particular service. The six groups are as follows:

Exceeding Needs — The City is exceeding a respondent's needs if a respondent is satisfied and the level of expressed satisfaction is higher than the importance that the respondent assigned to the service.

Meeting Needs, Moderately — The City is moderately meeting a respondent's needs if the respondent is satisfied and the level of satisfaction is commensurate with the level of importance assigned to the service.

Meeting Needs, Marginally — The City is marginally meeting a respondent's needs if the respondent is satisfied with the City's efforts to provide the service, but their level of satisfaction is lower than the level of importance assigned to the service.

Not Meeting Needs, Marginally — The City is marginally *not* meeting a respondent's needs if the respondent is somewhat dissatisfied, but the service is also viewed as just somewhat or not at all important.

Not Meeting Needs, Moderately — The City is moderately *not* meeting a respondent's needs if A) a respondent is very dissatisfied with the City's efforts to provide the service, but the service is viewed somewhat or not at all important, or B) a respondent is somewhat dissatisfied and the service is very important.

Not Meeting Needs, Severely — The City is severely *not* meeting a respondent's needs if A) a respondent is dissatisfied and the service is viewed as extremely important, or B) a respondent is very dissatisfied and the service is viewed as very important.

3. Any tool that relies on the opinions of the average respondent will provide a limited and occasionally distorted picture of how well an agency is performing. The simple fact is that a city is not comprised of average residents—it is comprised of unique individuals who vary substantially in their opinions of the City's performance in different service areas. Thus, although the arithmetic average of these individuals' opinions is a useful statistic, it does not capture the variation in opinions that occurs among residents, and it is this variation that is critical for truly assessing how well the City is meeting the needs of its residents.

TABLE 5 RESIDENT SERVICE NEEDS & PRIORITIES MATRIX

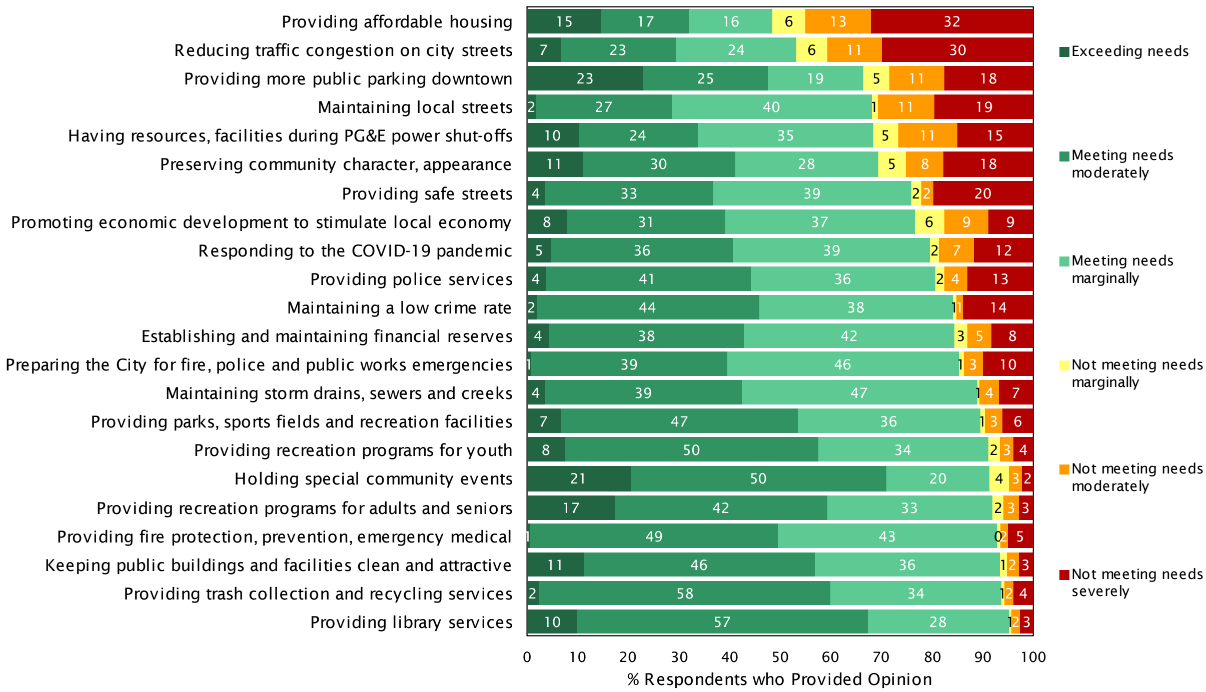
Satisfaction	Importance: Not at all important	Somewhat important	Very important	Extremely important
Very satisfied	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
Somewhat satisfied	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, marginally
Somewhat dissatisfied	Not meeting needs, marginally	Not meeting needs, marginally	Not meeting needs, moderately	Not meeting needs, severely
Very dissatisfied	Not meeting needs, moderately	Not meeting needs, moderately	Not meeting needs, severely	Not meeting needs, severely

Using this framework, True North categorized respondents individually for each of the 22 services tested in the study. Thus, for example, a respondent who indicated that reducing traffic congestion on city streets was somewhat important and they were very satisfied with the City's efforts in this service area would be categorized in the *exceeding needs* group for this service. The same respondent may be grouped in the *marginally not meeting needs* group for another service (e.g., providing affordable housing) if they were somewhat dissatisfied with the City's efforts to provide the service, but the service was viewed as only somewhat important.

Figure 10 on the next page presents the 22 services tested, along with the percentage of respondents who were grouped into each of the six possible categories. For ease of interpretation, the color-coding in Figure 10 is consistent with that presented in Table 5. Thus, for example, in the service area of reducing traffic congestion on city streets, the City is exceeding the needs of 5% of respondents, moderately meeting the needs of 13% of respondents, marginally meeting the needs of 19% of respondents, marginally not meeting the needs of 5% of respondents, moderately not meeting the needs of 13% of respondents, and severely not meeting the needs of 44% of respondents.

As shown in the figure, the City is meeting the needs of at least three-quarters of residents for 16 of the 22 services tested. Operating from the management philosophy that, all other things being equal, the City should focus on improving those services that have the highest percentage of residents for which the City is currently *not* meeting their needs, the services have been sorted by order of priority. Thus, providing affordable housing is the top priority, followed by reducing traffic congestion on city streets, providing more public parking downtown, and maintaining local streets.

FIGURE 10 RESIDENT SERVICE NEEDS



Biking in San Carlos

Beginning in June 2020, the City of San Carlos established bike loops on Saturdays and Sundays to encourage exercise through bicycling, jogging, and walking *and* to provide residents with an alternative means to travel Downtown. In this section, we report on how these changes have impacted residents' opinions of bike safety in San Carlos, as well as whether they personally had used the bike loops to bike or walk on the weekends.

BICYCLE SAFETY The first question in this series asked respondents if they felt that riding a bike on city streets in San Carlos is generally safe or unsafe. As shown in Figure 11, a majority of residents (56%) indicated in the 2021 survey that it is generally safe to ride a bike on city streets in San Carlos, which represents a statistically significant increase of 11% when compared to the 2020 survey findings. Approximately one-quarter (26%) felt in 2021 that riding a bike on city streets is unsafe, whereas 18% were unsure or preferred to not share their opinion.

Question 7 *Would you say it is generally safe or unsafe to ride a bike on city streets in San Carlos?*

FIGURE 11 OPINION OF BIKE SAFETY BY STUDY YEAR

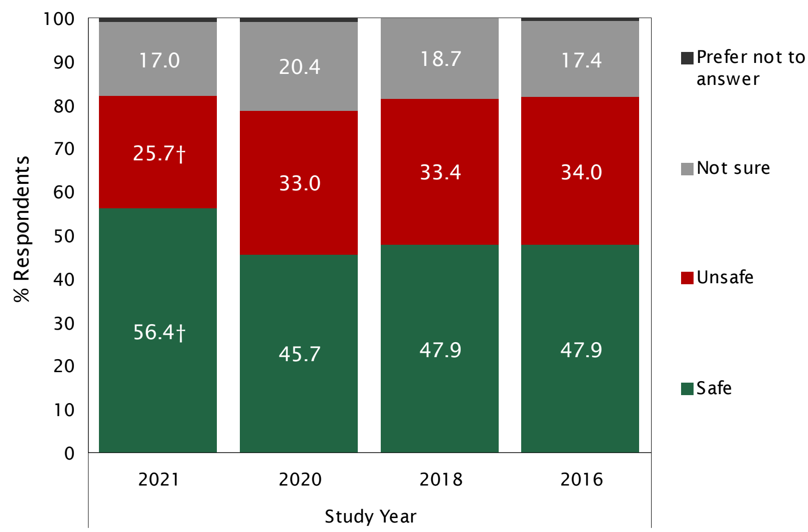
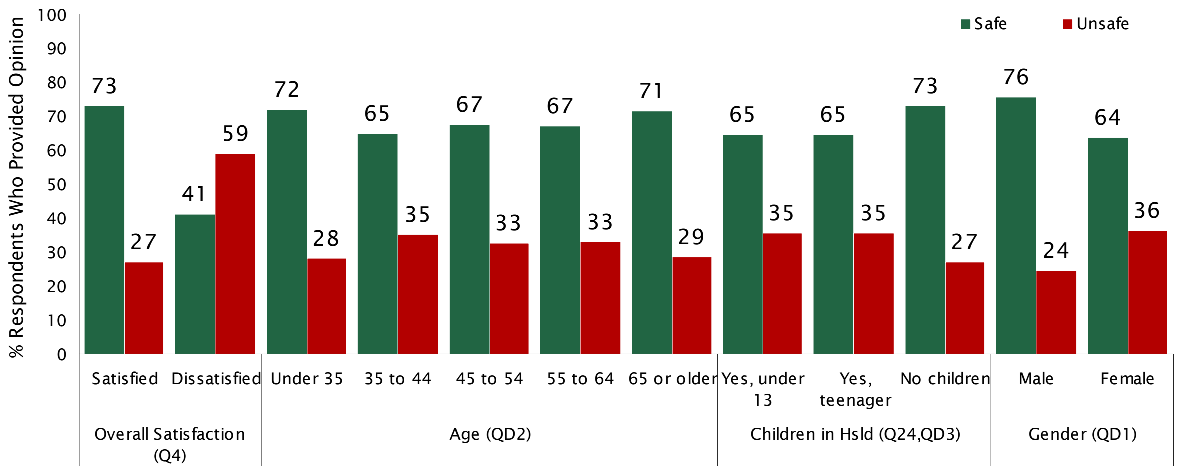


Figure 12 on the next page shows how ratings of bicycle safety in San Carlos varied by overall opinion of the City's performance, age, presence of a child in the home, and gender *among those who provided an opinion* (safe or unsafe). Safety ratings were highest among residents who were satisfied with the City's overall performance, the youngest (under 35) and oldest (65+) age cohorts, those without children in the home, and males.

FIGURE 12 OPINION OF BIKE SAFETY BY OVERALL SATISFACTION, AGE, CHILDREN IN HSLD & GENDER



BIKE LOOPS When asked if they personally had used the bike loops established by the City to bike or walk on the weekends, nearly one-in-five respondents (17%) answered in the affirmative (Figure 13). When compared to their respective counterparts, reported use of the bike loops was noticeably higher among residents age 45 to 54 and those with a child or teenager in the home (see Figure 14).

Question 8 *Beginning in June of this year, the City of San Carlos established bike loops on Saturdays and Sundays to encourage exercise through bicycling, jogging and walking and to provide residents with an alternative means to travel Downtown. Have you used the bike loops to bike or walk on the weekends?*

FIGURE 13 USED BIKE LOOPS ON WEEKENDS

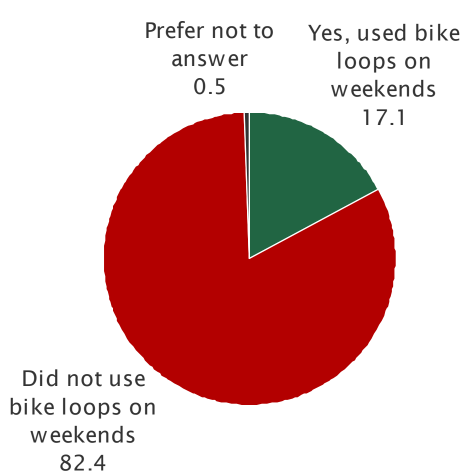
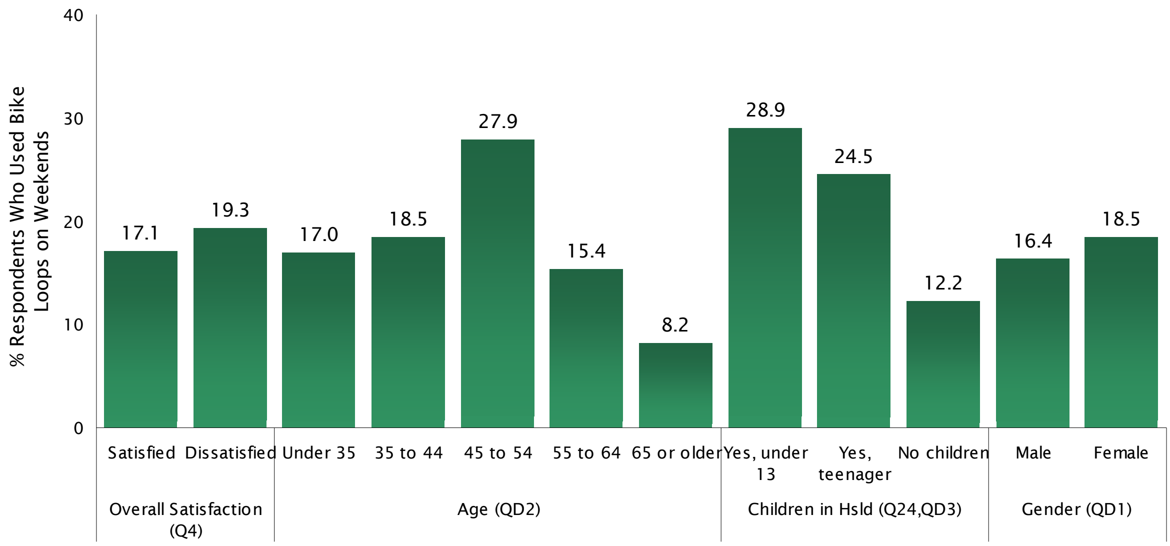


FIGURE 14 USED BIKE LOOPS ON WEEKENDS BY OVERALL SATISFACTION, AGE, CHILDREN IN HSLD & GENDER



Local Governance & Customer Service

Although much of the survey focused on residents' satisfaction with the City's efforts to provide specific services, San Carlos—like other progressive cities—recognizes there is more to good local governance than simply providing satisfactory services. Do residents perceive that the City is accessible and responsive to residents' needs? Do residents feel that staff serves their needs in a professional manner? How well do residents trust the City, and do they view the City as fiscally responsible? Answers to questions like these are as important as service or policy-related questions in measuring the City's performance in meeting residents' needs. Accordingly, they were the focus of the next section of the interview.

PERCEPTIONS OF CITY GOVERNMENT The first question in this series was designed to profile respondents' perceptions of city government on a variety of dimensions, including fiscal responsibility and responsiveness. For each of the four statements shown along the bottom of Figure 15, respondents were asked whether they agreed or disagreed with the statement, or if they had no opinion. The percentages shown in the colored bars are among those who provided an opinion.

Overall, 79% of residents agreed that the City manages its finances well, 78% said that they trust the City of San Carlos, 68% felt the City is responsive to residents' needs, and 62% agreed that the City listens to residents when making important decisions. Table 6 on the next page provides the percentage of respondents who agreed with each of the statements from 2014 to 2021, among those who provided an opinion. There were no statistically significant changes between the 2020 and 2021 surveys.

Question 9 *Next, I'm going to read you a series of statements about the City of San Carlos. For each, I'd like you to tell me whether you agree or disagree with the statement.*

FIGURE 15 AGREEMENT WITH STATEMENTS ABOUT SAN CARLOS

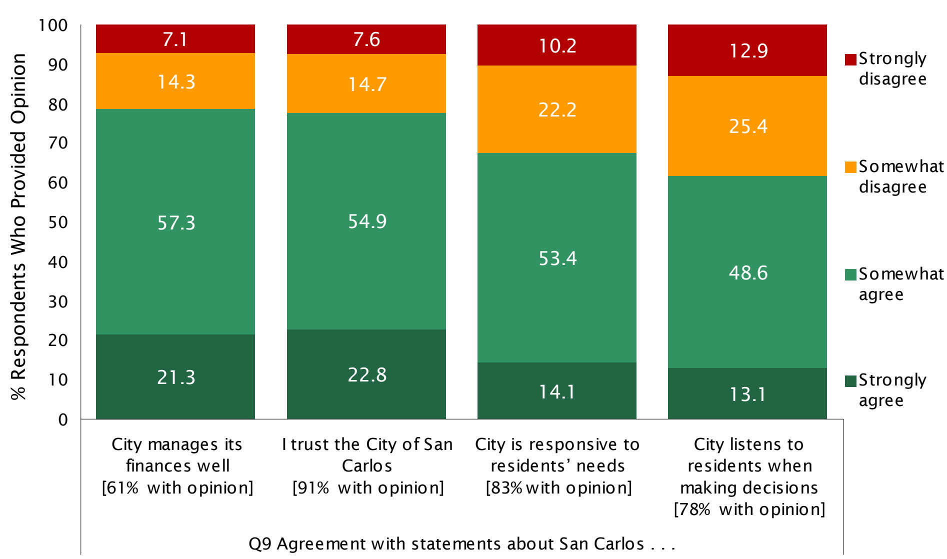


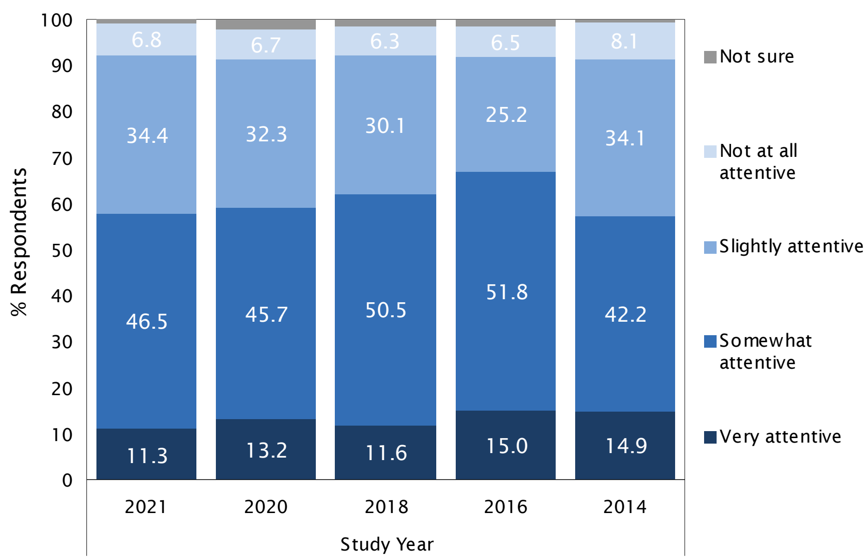
Table 6 Agreement With Statements About City by Study Year

	Study Year 2021	2020	2018	2016	2014	Change in Agreement 2020 to 2021
The City listens to residents when making important decisions	61.6	60.8	64.2	61.2	71.5	+0.9
I trust the City of San Carlos	77.7	77.4	77.2	75.8	84.4	+0.3
The City manages its finances well	67.6	67.9	69.2	69.2	67.8	-0.3
The City is responsive to residents' needs	78.6	79.7	76.0	68.6	76.2	-1.0

ATTENTION PAID TO YOUR CITY GOVERNMENT The next question in this series asked respondents to rate how attentive they are to the issues, decisions, and activities of the San Carlos city government using a scale of very attentive, somewhat attentive, slightly attentive, or not at all attentive. Overall, 11% of respondents in 2021 claimed they are very attentive to matters of local government, 47% somewhat attentive, and 34% slightly attentive. An additional 8% of respondents confided that they do not pay any attention to the activities of the City of San Carlos or were not sure. There were no statistically significant changes from 2020 to 2021 (see Figure 16).

Question 10 *How much attention do you pay to the issues, decisions, and activities of your City government? Would you say that you are very attentive, somewhat attentive, slightly attentive, or not at all attentive?*

Figure 16 Attentiveness to City Government by Study Year



Figures 17 and 18 on the next page display how attentiveness to local government differed across a variety of demographic subgroups. Respondents who have lived in San Carlos at least 15 years, residents 45 years and older, those living with a teenager, home owners, respondents who reported being dissatisfied with the City's overall performance, and those who had personal contact with a San Carlos staff member in the past year were generally more likely than their counterparts to say they are at least somewhat attentive to issues, decisions, and activities of the San Carlos city government.

FIGURE 17 ATTENTIVENESS TO CITY GOVERNMENT BY YEARS IN SAN CARLOS & AGE

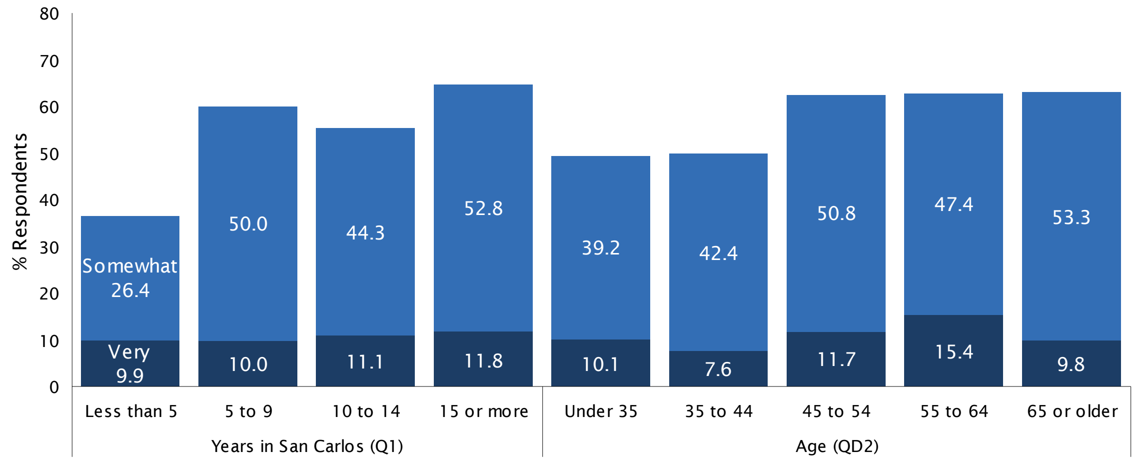
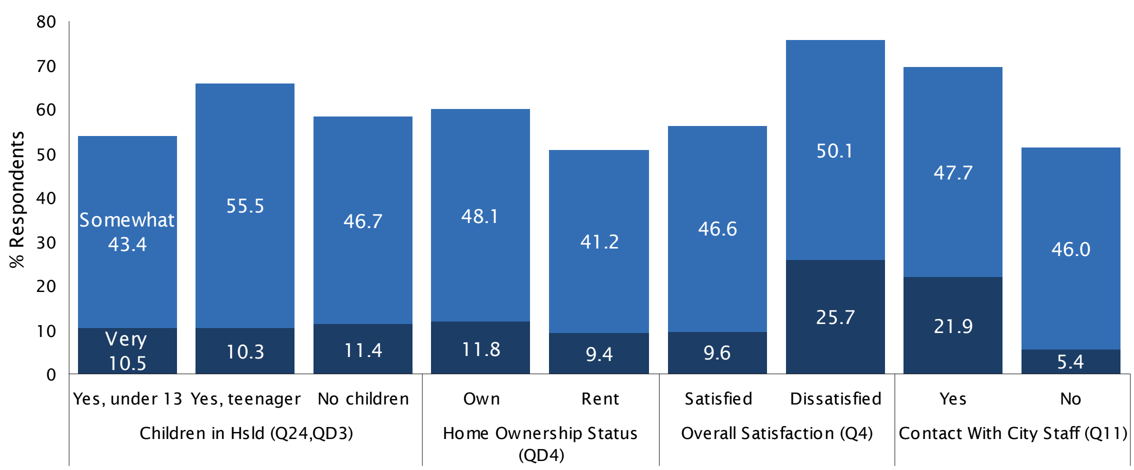


FIGURE 18 ATTENTIVENESS TO CITY GOVERNMENT BY CHILDREN IN HSLD, HOME OWNERSHIP STATUS, OVERALL SATISFACTION & CONTACT WITH CITY STAFF



CITY STAFF The next question in this series asked if the respondent had been in contact with City of San Carlos staff in the 12 months prior to the interview. As shown in Figure 19, 36% of respondents indicated they had been in contact with staff in the past 12 months. Although research has generally shown lower rates of staff contact during the pandemic period, it is also the case that the significant decline in staff contact witnessed in 2021 is a slight acceleration of a longer-term trend in the City of San Carlos dating back to 2014.

When compared with their respective counterparts, those who have lived in the City five to nine years, those 45 to 54 years of age, and home owners were the most likely to report having contact with city staff in the past year (see Figure 20).

Question 11 *In the past 12 months, have you been in contact with staff from the City of San Carlos?*

FIGURE 19 CONTACT WITH CITY IN PAST 12 MONTHS BY STUDY YEAR

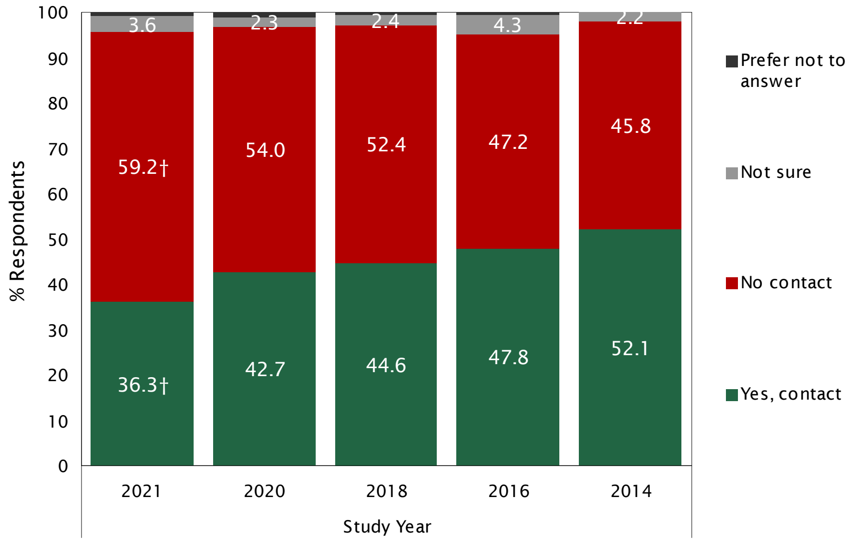
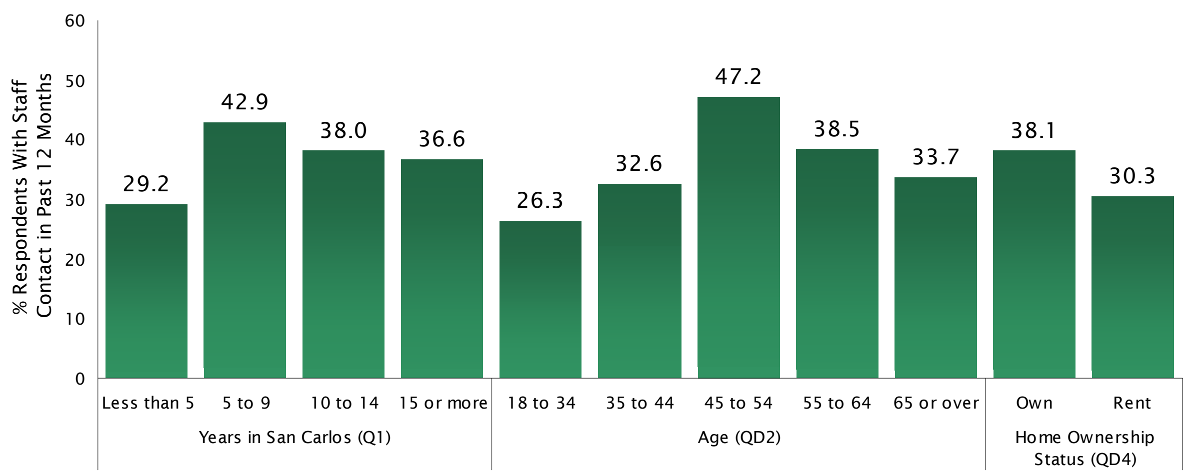


FIGURE 20 CONTACT WITH CITY IN PAST 12 MONTHS BY YEARS IN SAN CARLOS, AGE & HOME OWNERSHIP STATUS



Respondents who had contact with city staff in the past 12 months were subsequently asked to rate city staff on three dimensions: helpfulness, professionalism, and accessibility. As displayed in Figure 21 on the next page, San Carlos residents rated city staff high on all three dimensions tested, with approximately nine-in-ten residents rating staff as very or somewhat professional (89%) and accessible (89%) and approximately eight-in-ten rating staff as helpful (78%). As shown in Table 7 on the next page, there were no statistically significant changes from the 2020 study in the percentage of residents who provided the highest rating, among those who provided an opinion.

Question 12 *In your opinion, was the staff at the City very _____, somewhat ______, or not at all _____. Read one item at a time, continue until all items are read.*

FIGURE 21 OPINION OF CITY STAFF

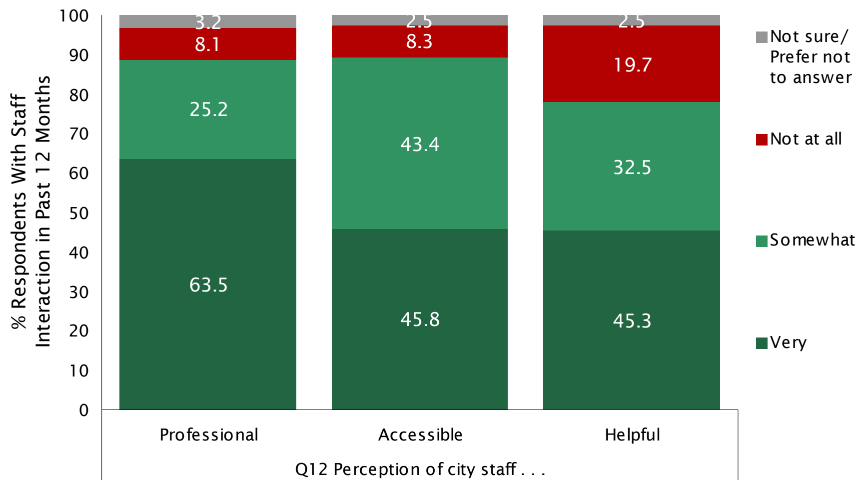


TABLE 7 OPINION OF CITY STAFF BY STUDY YEAR (SHOWING % VERY AMONG THOSE WITH OPINION)

	Study Year					Change in % *Very* 2020 to 2021
	2021	2020	2018	2016	2014	
Helpful	46.5	46.4	46.6	47.4	47.1	+0.1
Accessible	47.0	47.9	47.4	54.4	50.2	-0.9
Professional	65.6	67.8	66.5	65.9	69.6	-2.2

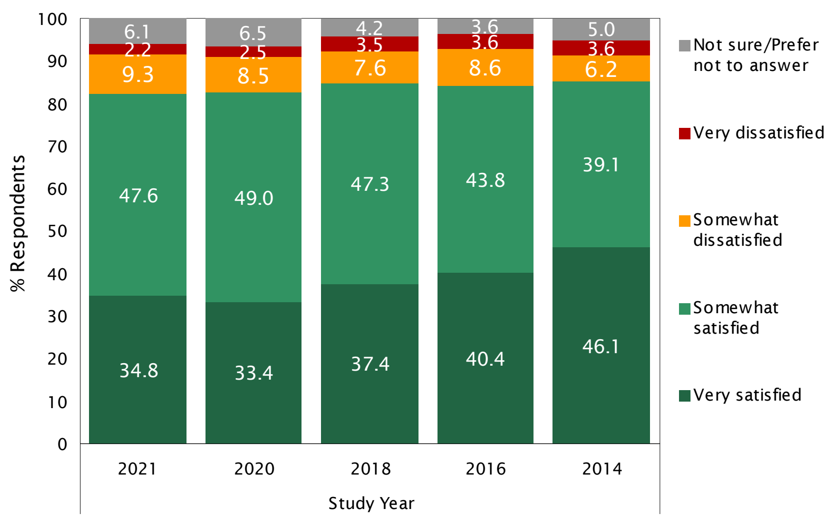
Communication

The importance of city communication with residents cannot be over-stated. Much of a city's success is shaped by the quality of information that is exchanged in both directions, from the City to the community and from the community to the City. This study is just one example of San Carlos' efforts to enhance the information flow *to* the City to better understand the community's concerns, perceptions, and needs. Some of San Carlos' many efforts to communicate with its residents include its newsletters, timely press releases, social media posts, and its website. In this section, we present the results of several communication-related questions.

OVERALL SATISFACTION WITH COMMUNICATION Question 13 asked San Carlos residents to report their satisfaction with city-resident communication. Overall, 82% of respondents indicated they were satisfied with the City's efforts to communicate with residents through newsletters, the Internet, television, and other means. The remaining respondents were either dissatisfied with the City's efforts in this respect (12%) or unsure of their opinion (6%). The results for this question in 2021 were consistent with those recorded in 2020—there were no statistically significant changes (see Figure 22).

Question 13 *Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, television, and other means?*

FIGURE 22 SATISFACTION WITH COMMUNICATION BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2021 studies.

The next two figures display how satisfaction with the City's efforts to communicate with residents varied by length of residence, gender, presence of a child in the home, age of the respondent, home ownership status, and satisfaction with the City's overall performance in providing services. Satisfaction with communication efforts was widespread, with at least three-quarters of respondents in all but one subgroup reporting they were either very or somewhat satisfied. As might be expected, residents who were dissatisfied with the City's overall performance also reported less satisfaction with the City's communication efforts.

FIGURE 23 SATISFACTION WITH COMMUNICATION BY YEARS IN SAN CARLOS, GENDER & CHILDREN IN HSLD

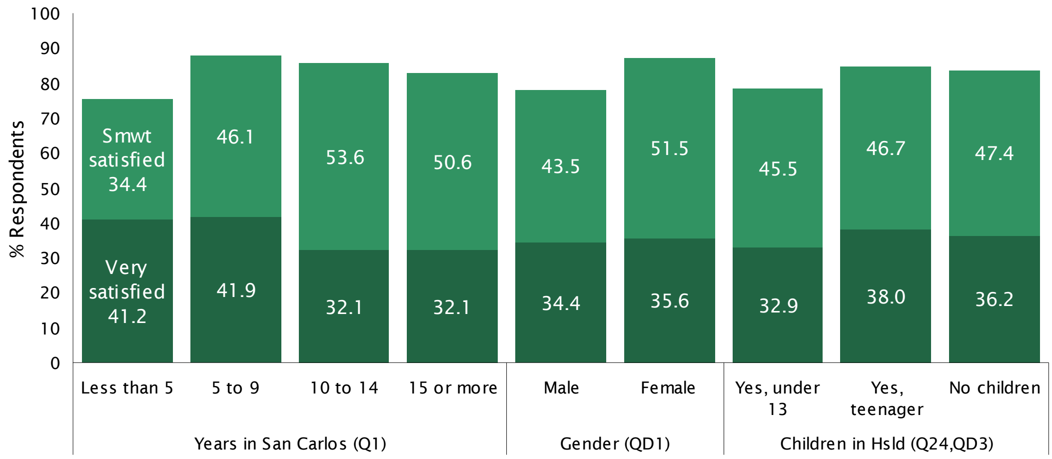
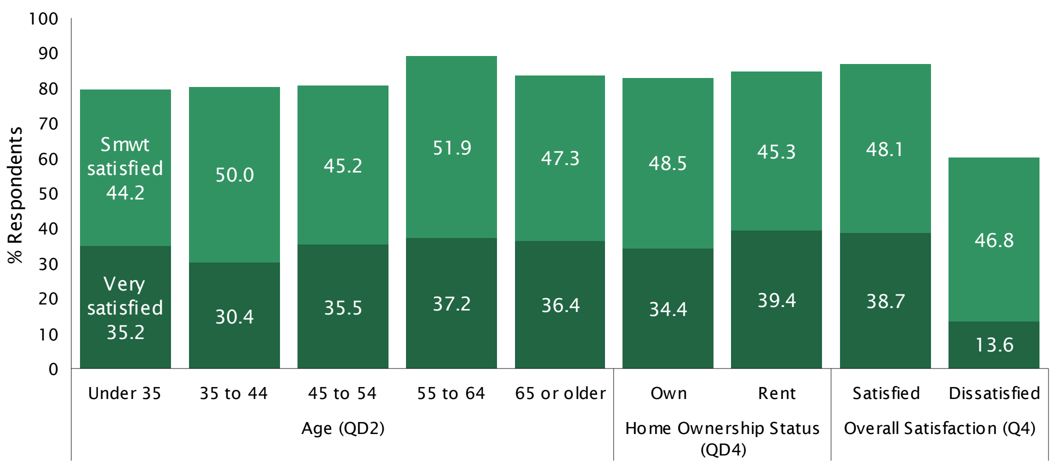


FIGURE 24 SATISFACTION WITH COMMUNICATION BY AGE, HOME OWNERSHIP STATUS & OVERALL SATISFACTION



SOURCES OF INFORMATION To help the City identify the most effective means of communicating with residents, it is helpful to understand what information sources they currently rely on for this type of information. Question 14 asked respondents to identify the top three information sources they typically use to find out about City of San Carlos news, events, and programs. Because respondents were allowed to provide up to three sources, the percentages shown in Figure 25 on the next page represent the percentage of residents who mentioned a particular source and thus sum to more than 100.

The most frequently-cited source for city information was city newsletters/Good Living community newsletter, mentioned by 64% of respondents. The City's newsletters were followed by Nextdoor (28%), the City's website (25%), email notifications from the City (21%), and postcards, letters, flyers or brochures mailed to their home (17%). For the interested reader, Table 8 on the next page compares the top information sources cited in response to Question 14 in each study year. Although their relative ranking has changed over time, the top five sources for San Carlos news, events and programming have remained the same since 2016.

Question 14 *What information sources do you use to find out about City of San Carlos news, events, and programs?*

FIGURE 25 CITY INFORMATION SOURCES

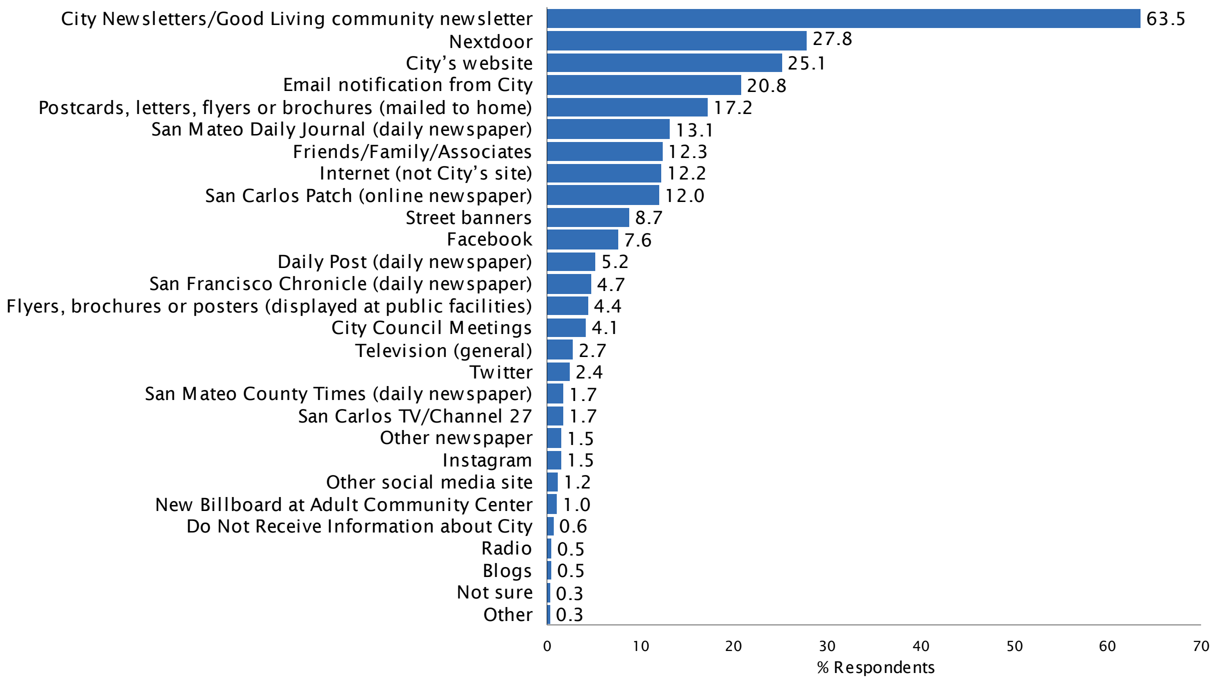


TABLE 8 TOP CITY INFORMATION SOURCES BY STUDY YEAR

Study Year 2021	2020	2018	2016	2014
City Newsletters	City Newsletters	City Newsletters	City Newsletters	City Newsletters
Nextdoor	Nextdoor	City's website	Postcards, letters, flyers or brochures (mailed to home)	City's website
City's website	Postcards, letters, flyers or brochures (mailed to home)	Nextdoor	Email notification from City	Street banners
Email notification from City	City's website	Postcards, letters, flyers or brochures (mailed to home)	Nextdoor	Email notification from City
Postcards, letters, flyers or brochures (mailed to home)	Email notification from City	Email notification from City	City's website	San Carlos Patch

Figures 26 and 27 on the next page present the information source categories by age, presence of a child in the home, home ownership status, and satisfaction with the City's communication efforts. For ease of interpretation, the bars representing city-sponsored sources are displayed in shades of green, and non-city sources in shades of orange.

FIGURE 26 INFORMATION SOURCE CATEGORIES BY OVERALL & AGE

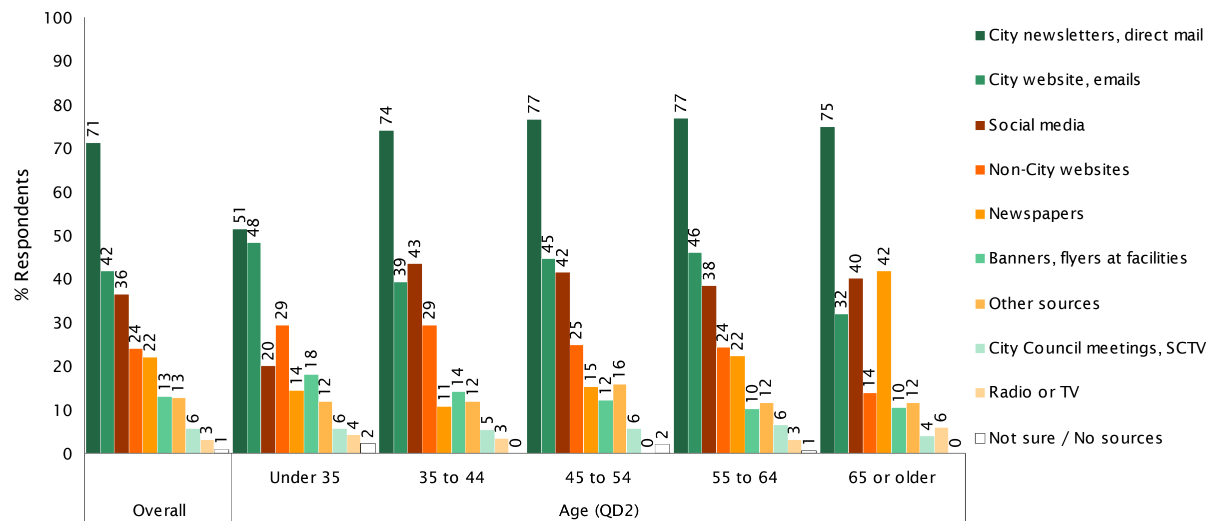
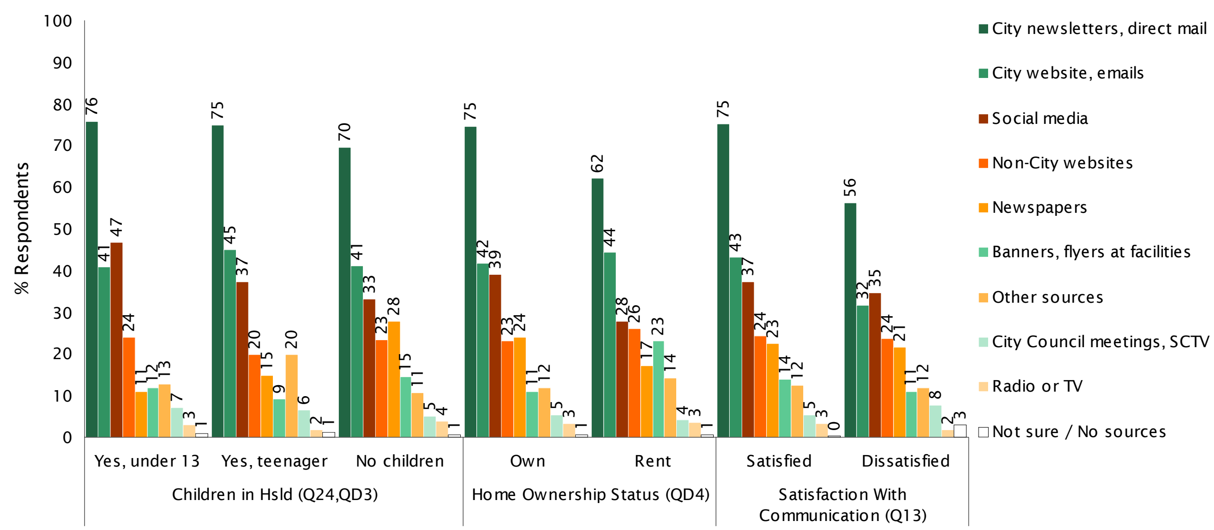


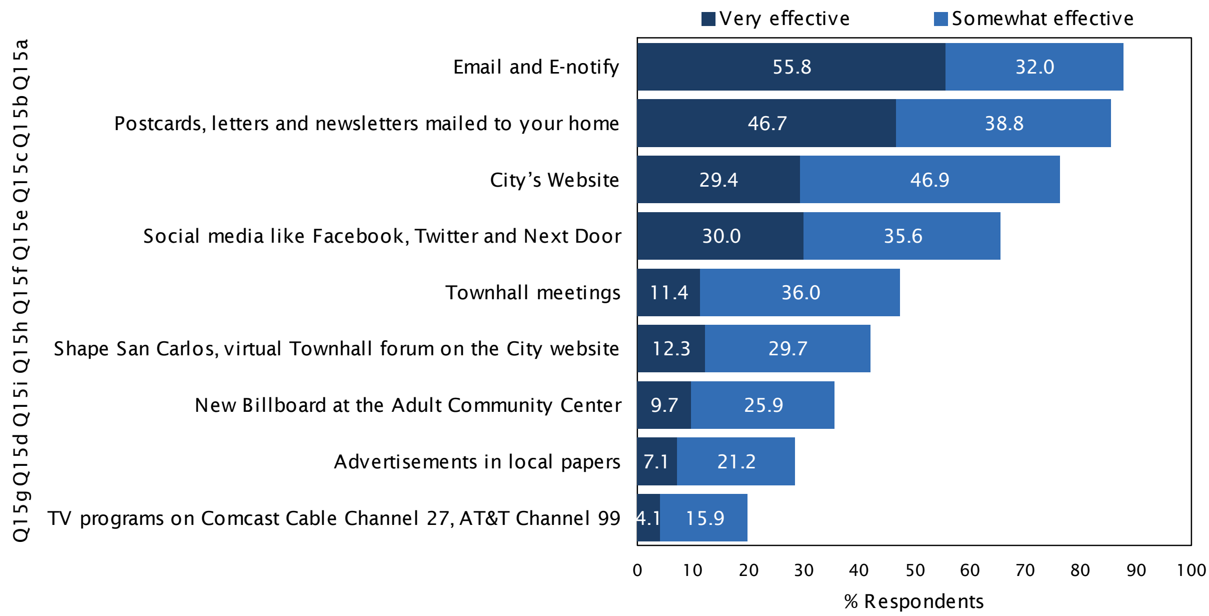
FIGURE 27 INFORMATION SOURCE CATEGORIES BY CHILDREN IN HSLD, HOME OWNERSHIP STATUS & SATISFACTION WITH COMMUNICATION



COMMUNICATION PREFERENCES The next communication-related question presented residents with the methods shown to the left of Figure 28 on the next page and asked whether each would be an effective way for the City to communicate with them. Overall, respondents indicated that email and e-notifications was the most effective method (88% very or somewhat effective), followed by postcards, letters, and newsletters mailed to the home (86%), the City's website (76%), and social media like Facebook, Twitter, and Nextdoor (66%). More than one-third of respondents also indicated that town hall meetings (47%), Shape San Carlos (42%), and the new billboard at the Adult Community Center (36%) would be at least somewhat effective methods for the City to communicate with them. When compared to the other methods tested, San Carlos residents found TV programs on Comcast Cable Channel 27 and AT&T Channel 99 (20%) and advertisements in local papers (28%) to be the least effective ways for the City to communicate with them.

Question 15 *As I read the following ways that the City of San Carlos can communicate with residents, I'd like to know if you think they would be very effective, somewhat effective, or not an effective way for the City to communicate with you.*

FIGURE 28 EFFECTIVENESS OF COMMUNICATION EFFORTS



Over the past year, the percentage of residents who rated the City's website (+8%) and email/e-notifications (+5%) as *very* effective ways for the City to communicate with them increased significantly (see Table 9). The same period also witnessed a significant decline in the percentage who viewed townhall meetings to be very effective (-4%).

TABLE 9 EFFECTIVENESS OF COMMUNICATION EFFORTS BY STUDY YEAR

	Study Year					Change in % Very Effective 2020 to 2021
	2021	2020	2018	2016	2014	
City's Website	29.4	21.0	27.4	24.6	17.8	+8.4†
Email and E-notify	55.8	50.4	57.8	63.9	60.3	+5.4†
Shape San Carlos, virtual Townhall forum on the City website	12.3	11.0	12.7	10.4	11.4	+1.3
Advertisements in local papers	7.1	6.6	7.6	5.0	25.5	+0.6
Social media like Facebook, Twitter and Nextdoor	30.0	29.6	34.3	29.2	8.6	+0.4
TV programs on Comcast Cable Channel 27, AT&T Channel 99	4.1	4.0	6.1	3.5	19.7	+0.1
Postcards, letters and newsletters mailed to your home	46.7	46.8	51.3	47.7	55.3	-0.2
Townhall meetings	11.4	15.2	14.5	13.7	16.5	-3.8†
New Billboard at the Adult Community Center	9.7094	N/A	N/A	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2020 and 2021 studies.

Table 10 on the next page shows how the percentage of residents that rated each communication method as *very effective* varied depending on their satisfaction with the City's overall efforts to provide municipal services and their age, with the top three methods within each subgroup highlighted green. It is noteworthy that even among seniors, email and e-notifications were viewed as the most effective way for the City to communicate.

TABLE 10 EFFECTIVENESS OF COMMUNICATION METHODS BY OVERALL SATISFACTION & AGE (SHOWING % VERY EFFECTIVE)

	Overall Satisfaction (Q4)		Age (QD2)				
	Satisfied	Dissatisfied	18 to 34	35 to 44	45 to 54	55 to 64	65 or over
Email and E-notify	58.6	45.3	56.5	56.5	66.0	53.8	51.6
Postcards, letters and newsletters mailed to your home	48.3	37.6	42.6	47.8	49.2	46.8	51.1
Social media like Facebook, Twitter and Nextdoor	31.3	19.4	39.0	34.8	38.1	21.2	21.2
City's Website	31.8	23.9	39.7	28.3	29.4	30.1	23.4
Shape San Carlos, virtual Townhall forum on the City website	13.3	6.9	19.6	7.6	12.7	17.3	6.0
Townhall meetings	12.6	7.2	10.8	8.7	11.2	11.5	14.1
New Billboard at the Adult Community Center	10.2	8.1	13.9	7.6	6.1	12.2	9.8
Advertisements in local papers	8.0	4.6	13.2	3.3	4.1	5.8	9.8
TV programs on Comcast Cable Channel 27, AT&T Channel 99	3.9	6.8	6.2	1.1	2.0	5.1	4.9

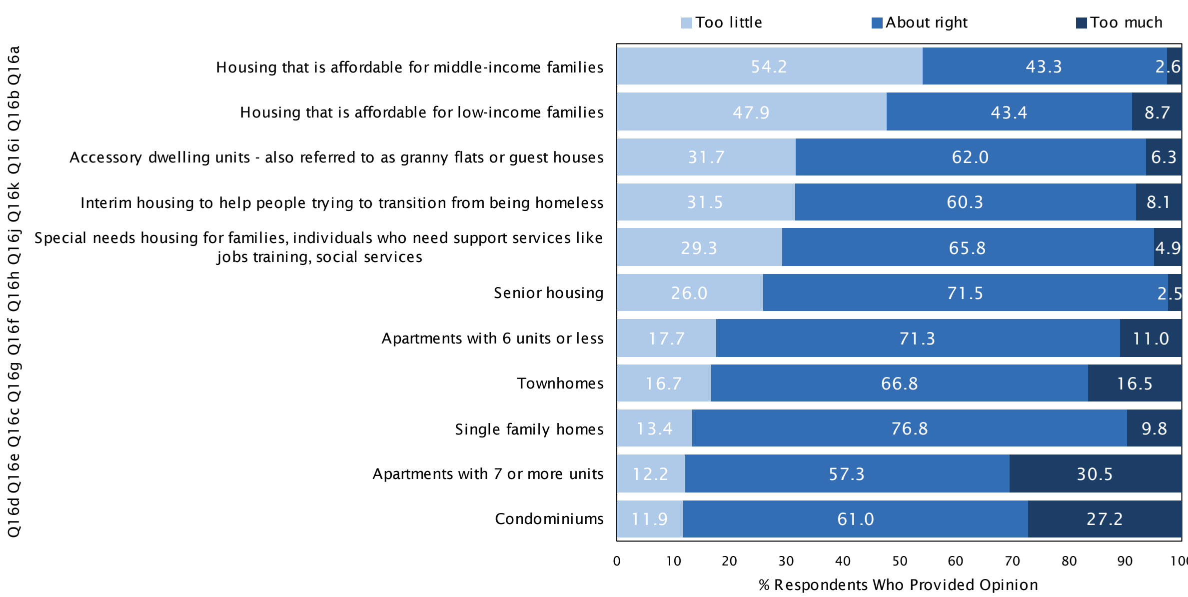
Development & Housing

The San Carlos Community Development Department and its Building, Housing, and Planning divisions play a vital role in sustaining a livable, vibrant, and economically sound community. The 2021 survey included two questions designed to measure residents' opinions regarding the pace of development in San Carlos, as well as the availability of different types of housing in the community.

HOUSING TYPES Opinions about housing often vary depending on the *type* of housing being discussed. To provide the City with a clearer picture of residents' opinions about housing, Question 16 presented respondents with the list of housing types shown on the left of Figure 29 and simply asked if they felt there is currently too much, about the right amount, or too little of each type in San Carlos.

Question 16 *Next, I would like to ask a few questions about the availability of housing in the City of San Carlos. As I read the following housing types, please tell me whether you feel there is currently too much, about the right amount, or too little of this type of housing in the City of San Carlos.*

FIGURE 29 OPINION OF HOUSING DEVELOPMENT TYPES IN CITY



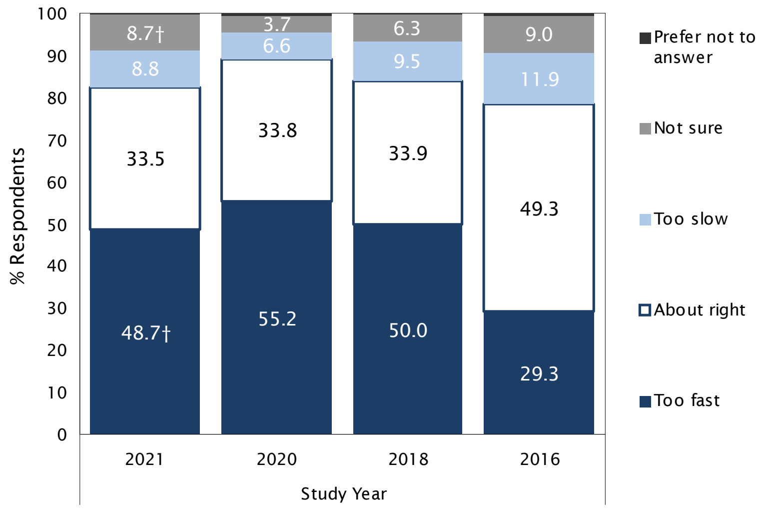
Approximately half of respondents felt there was too little housing that is affordable for middle-income families (54%) and low-income families (48%). Although the dominant answer for the remaining housing types tested was *about right*, the percentage who felt there was not enough accessory dwelling units (32%), interim housing for people transitioning from homelessness (32%), special needs housing for families and individuals who need support services like job training and social services (29%), and senior housing (26%) was much higher than the percentage who felt there was already too much of each type of housing in San Carlos.

When compared to the other types of housing mentioned above, fewer respondents felt there is currently not enough supply of condominiums (12%), apartments with seven or more units (12%), single family homes (13%), townhomes (17%), and apartments with six units or less (18%) in San Carlos. It is interesting that with the exception of additional dwelling units (ADUs), residents are two to three times more likely to cite a deficiency in housing that is *programmed* for specific groups (affordable housing, special needs housing, interim housing, senior housing) than they are the physical structure of housing that could accommodate these needs (condominiums, townhomes, apartments).

PACE OF DEVELOPMENT The next question in this series asked residents to describe the pace of development in the City of San Carlos over the past three years—has it been too fast, about right, or too slow? Figure 30 shows that less than half (49%) of those surveyed in 2021 felt the pace of development to be too fast, a statistically significant decrease from the 2020 survey results. Approximately one-third (34%) felt the pace of development has been about right during the past three years, whereas 9% felt that the City has grown too slowly and an additional 9% of respondents were unsure or unwilling to share their opinion on this matter.

Question 17 *In the past three years, would you say the pace of development in San Carlos has been too fast, about right, or too slow?*

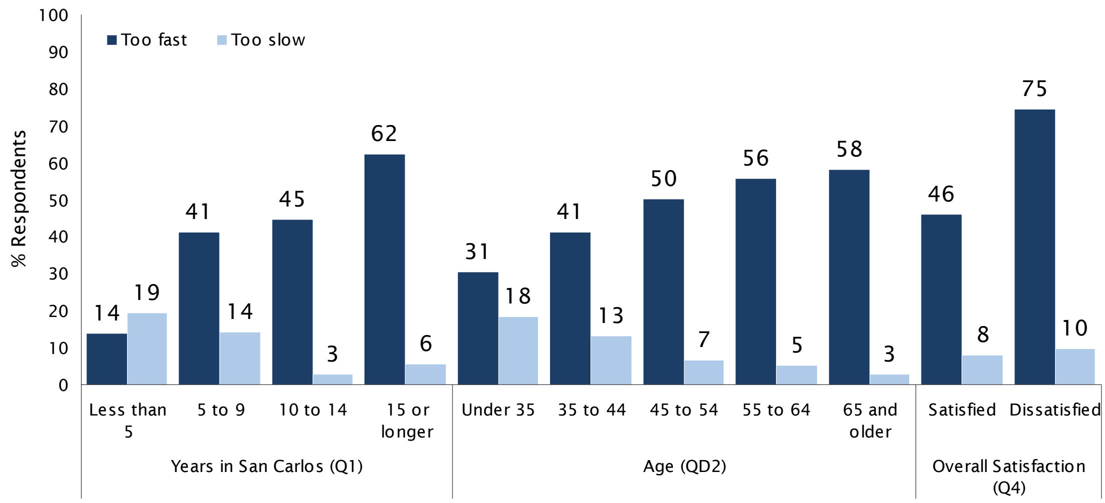
FIGURE 30 PACE OF DEVELOPMENT BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2021 studies.

As show in Figure 31 on the next page, attitudes about the pace of development in the City were strongly related to the number of years a resident has lived in the City and their age, such that as each dimension increased, so did the percentage who felt the pace of development in the past three years has been *too fast*. Similarly, residents who were dissatisfied with the City's overall performance were much more likely than their satisfied counterparts to perceive the pace of development to be *too fast* (75% vs. 46%).

FIGURE 31 PACE OF DEVELOPMENT BY YEARS IN SAN CARLOS, AGE & OVERALL SATISFACTION



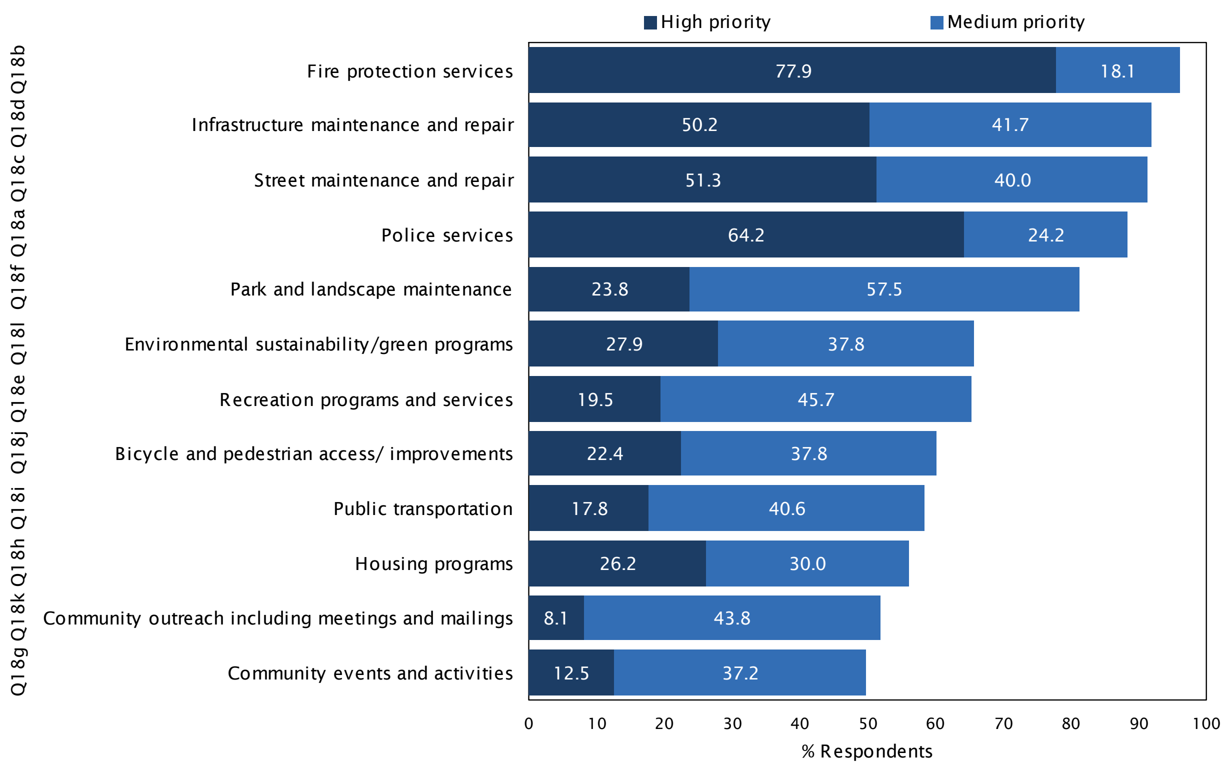
Funding Priorities

Like most cities in California, the City of San Carlos is feeling the financial impacts of the pandemic and is having to make budget cuts and other adjustments in response to the associated economic downturn. During this difficult period, the survey presented an opportunity for residents to help the City prioritize among various services, programs and projects that could receive funding in the future.

The first question in this series (Question 18) was straightforward: after informing respondents that the City does not have the financial resources to fund *all* of the services, programs, and projects that may be desired by residents, respondents were asked whether each project or program shown in Figure 32 should be a high, medium, or low priority for future city spending—or if the City should not spend money on the project at all. To encourage a sense of competition, respondents were instructed that not all of the projects and programs could be high priorities.

Question 18 *Like most cities in California, the City of San Carlos is having to make budget cuts due to the pandemic and associated economic downturn. Your opinions will help the City set priorities during this difficult period. As I read each of the following items, please indicate whether you think the City should make the item a high priority, a medium priority, or a low priority for future city spending. If you feel the City should not spend any money on this item, just say so. Please keep in mind that not all of the items can be high priorities.*

Figure 32 Funding Priorities



The 12 projects and programs are sorted in Figure 32 from high to low based on the percentage of respondents who indicated that an item was *at least* a medium priority for future city spending. Among the projects and programs tested, fire protection services (96% high or medium priority), infrastructure maintenance and repair (92%), street maintenance and repair (91%), and police services (88%) were the clear top priorities. Second tier priorities included park and landscape maintenance (81%), environmental sustainability/green programs (66%), recreation programs and services (65%), bicycle and pedestrian access/improvements (60%), public transportation (58%), and housing programs (56%).

When compared to the other projects and services tested, fewer residents rated community events and activities (50%) and community outreach including meetings and mailings (52%) as a high or medium priority for future city spending. For the interested reader, the Table 11 provides the percentage of respondents who considered each proposed improvement a *high priority* by their overall satisfaction with the City's performance and age (top three within each subgroup highlighted green).

TABLE 11 FUNDING PRIORITIES BY OVERALL SATISFACTION & AGE (SHOWING % HIGH PRIORITY)

	Overall Satisfaction (Q4)		Age (QD2)				
	Satisfied	Dissatisfied	18 to 34	35 to 44	45 to 54	55 to 64	65 or over
Fire protection services	78.7	73.6	80.9	69.6	72.1	83.3	83.2
Police services	64.0	73.5	34.5	60.9	65.0	76.9	78.3
Street maintenance and repair	51.5	52.3	53.1	44.6	52.8	51.9	54.9
Infrastructure maintenance and repair	50.7	49.2	53.1	47.8	49.7	52.6	52.2
Environmental sustainability/green programs	28.6	19.8	48.8	21.7	23.9	25.6	25.0
Housing programs	26.6	18.5	53.4	25.0	20.8	21.2	16.3
Park and landscape maintenance	24.9	16.4	25.1	27.2	28.4	19.2	20.1
Bicycle and pedestrian access/ improvements	22.1	23.4	22.5	29.3	31.5	18.6	12.5
Recreation programs and services	21.3	8.0	23.2	23.9	22.3	14.7	14.7
Public transportation	17.1	23.5	23.7	15.2	18.3	17.3	16.8
Community events and activities	13.8	8.1	15.5	13.0	15.2	11.5	8.7
Community outreach including meetings and mailings	7.3	11.9	16.3	2.2	7.1	6.4	8.7

ADDITIONAL HIGH PRIORITIES? As a follow-up to Question 18, all residents were next asked whether there was another item or project not previously mentioned that they thought was a high priority for the City to fund. This question was asked in an open-ended manner, allowing respondents to mention any project that came to mind without being prompted by or restricted to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 33 on the next page.

More than two-thirds of residents (71%) did not have anything to add to the list of projects and services tested previously. Among the specific items that were mentioned, addressing COVID-19 and COVID-related concerns (3%), reducing traffic congestion (3%), and improving education/ adding schools (2%) were the top responses. The latter two responses were also among the top three specific issues mentioned in 2020 in response to this same question (see Table 12).

Question 19 *Is there another item or project not already mentioned that you think should be a high priority for the City to fund?*

FIGURE 33 ADDITIONAL HIGH PRIORITY ITEMS

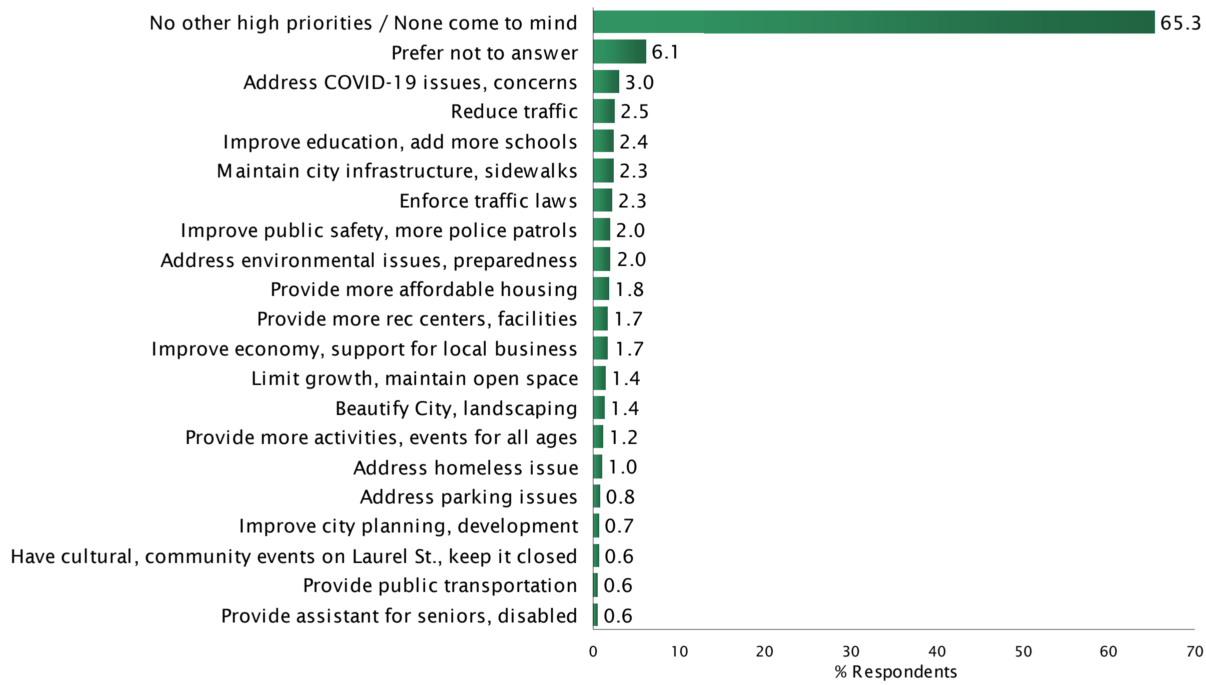


TABLE 12 ADDITIONAL HIGH PRIORITY ITEMS BY STUDY YEAR

Study Year 2021	Study Year 2020
No other high priorities / None come to mind	No other high priorities / None come to mind
Prefer not to answer	Limit growth, maintain open space
Address COVID-19 issues, concerns	Maintain city infrastructure
Reduce traffic	Reduce traffic
Improve education, add more schools	Improve education, add more schools

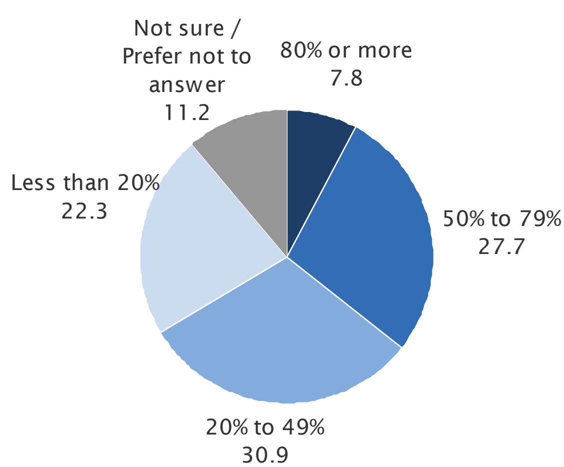
Shopping in San Carlos

One of the challenges that all cities face is creating sustainable economic development initiatives that will support the tax base required for current and future needs. The pandemic has elevated this challenge for many cities, as it has accelerated trends toward online shopping that can negatively impact local businesses and divert sales tax revenues away from local jurisdictions. The 2021 survey presented an opportunity to measure San Carlos residents' local shopping habits, understand how they have been impacted by the pandemic, and explore changes that may help improve the local economy.

RETAIL SHOPPING HABITS The first question in this series asked respondents to identify the percentage of their household's retail shopping dollars that they spend locally in San Carlos. As shown in Figure 34, approximately 36% of households indicated that they spend *at least half* of their household's retail shopping dollars within the City, with 8% spending at least 80% of their dollars within the City and 28% spending between 50% and 79% of their retail dollars in San Carlos. The majority of households (53%) reported they spend less than half of their retail shopping dollars locally in San Carlos and an additional 11% of respondents were unsure or declined to state.

Question 20 *What percentage of your household's total shopping dollars do you spend locally in the City of San Carlos?*

FIGURE 34 PERCENTAGE OF HOUSEHOLD RETAIL SHOPPING DOLLARS SPENT IN SAN CARLOS



Figures 35-37 on the following pages show how residents' local shopping habits varied by characteristics such as length of residence, how the pandemic has impacted their household's financial situation, age, gender, and presence of a child in the home. When compared to their respective counterparts, longtime residents, those whose financial condition has worsened with the pandemic, individuals who are self-employed or currently laid-off/furloughed, retirees, those not living with a child, renters, seniors, and females were the most likely to report that they spend at least half of their retail shopping dollars in San Carlos.

FIGURE 35 PERCENTAGE OF HOUSEHOLD RETAIL SHOPPING DOLLARS SPENT IN SAN CARLOS BY YEARS IN SAN CARLOS, OVERALL SATISFACTION & HSLD FINANCIAL SITUATION DUE TO PANDEMIC

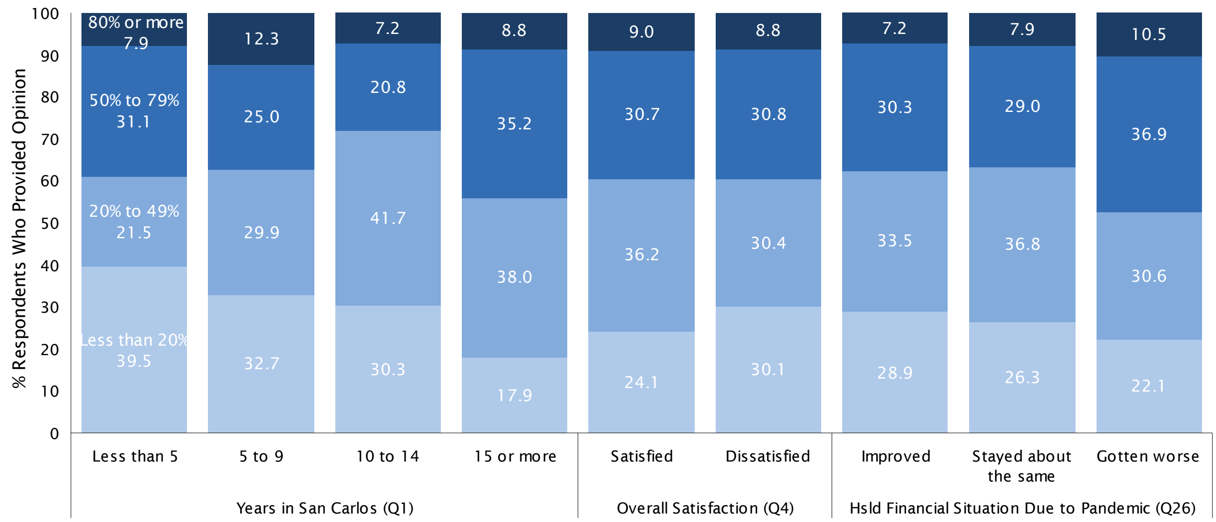


FIGURE 36 PERCENTAGE OF HOUSEHOLD RETAIL SHOPPING DOLLARS SPENT IN SAN CARLOS BY EMPLOYMENT STATUS & CHILDREN IN HSLD

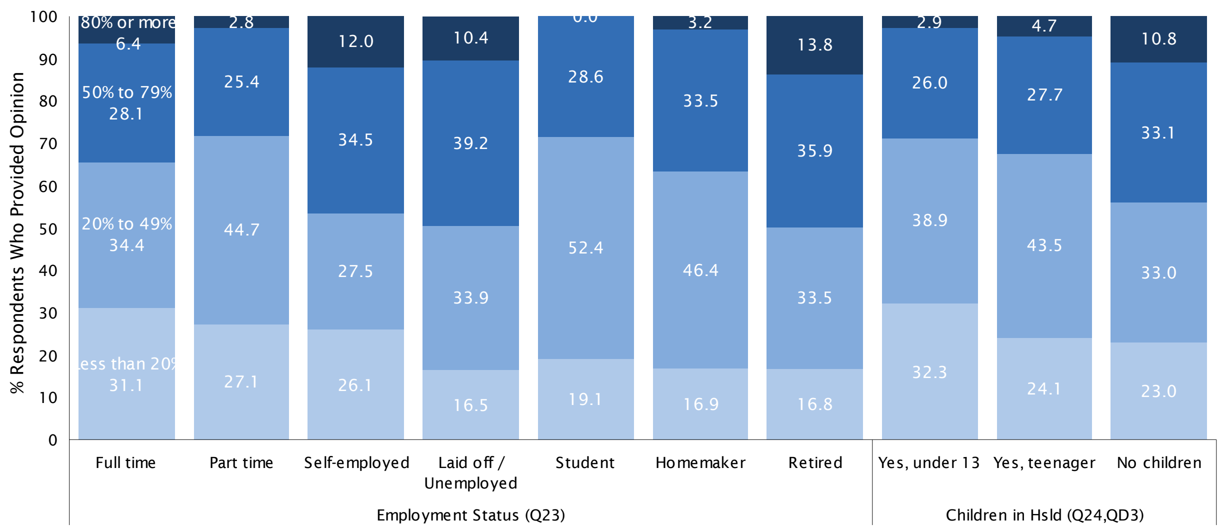
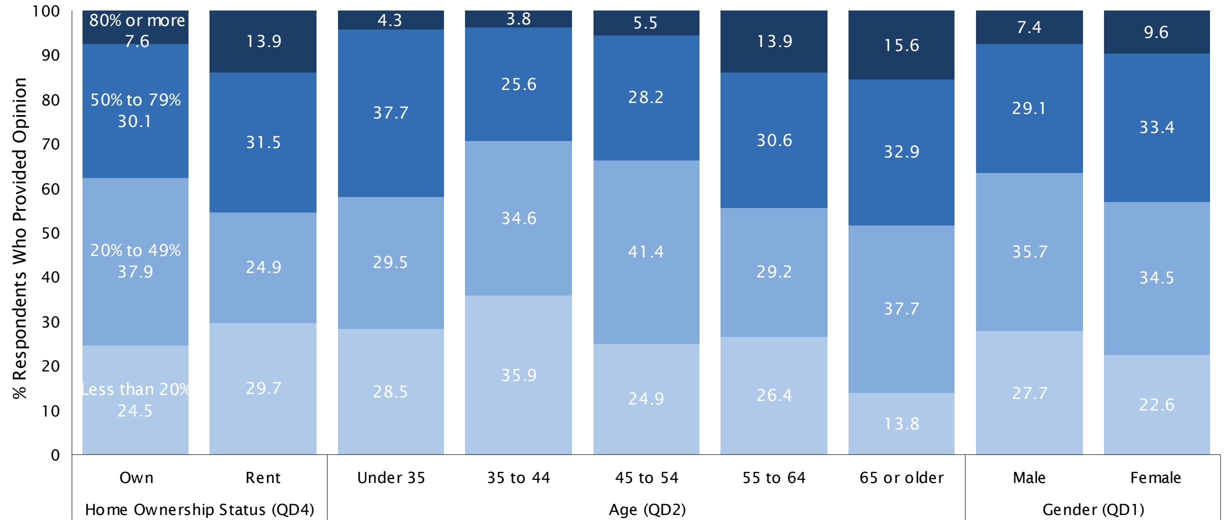


FIGURE 37 PERCENTAGE OF HOUSEHOLD RETAIL SHOPPING DOLLARS SPENT IN SAN CARLOS BY AGE & GENDER

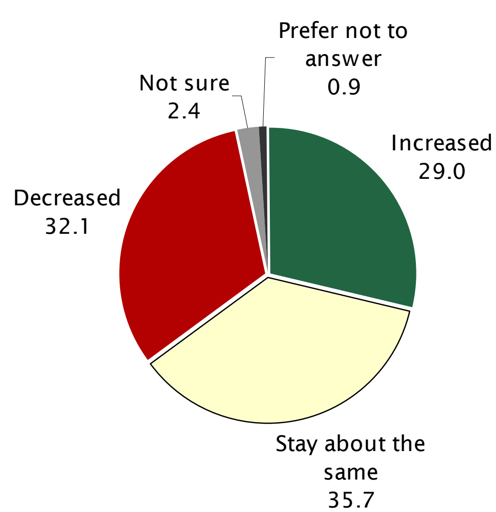


PANDEMIC IMPACT ON LOCAL SHOPPING

The pandemic and associated regulations have forced many businesses to curtail their operations in ways that limit shopping opportunities. At the same time, concerns about exposure to the coronavirus have compelled many individuals to shift their shopping online. With these twin forces at play, one might expect that the percentage of total shopping dollars residents spend locally in San Carlos would have declined in the past year. As shown in Figure 38, approximately one-third (32%) of residents did indeed reduce the percentage of their total shopping dollars spent in San Carlos since the pandemic started. However, this decline is offset by 29% reporting they increased their local shopping during the same period, and 36% reporting that the percentage of their retail dollars spent locally has not changed.

Question 21 *Since the pandemic started, has the percentage of your total shopping dollars that you spend in San Carlos increased, stayed about the same, or decreased?*

FIGURE 38 PERCENTAGE OF HSLD RETAIL SHOPPING DOLLARS INCREASE SINCE PANDEMIC



The balance of those who increased or decreased the percentage of their total shopping dollars spent in San Carlos in response to the pandemic was fairly even for most subgroups (see figures 39-41). Those dissatisfied with the City's overall performance in providing municipal services were substantially more likely to report decreasing their local retail spending since the pandemic started, as were those who indicated the pandemic worsened their household's financial condition, individuals who were laid off/furloughed, students, homemakers, and those aged 55 to 64.

Figure 39 Percentage of Hsld Retail Shopping Dollars Increase Since Pandemic by Years in San Carlos, Overall Satisfaction & Hsld Financial Situation Due to Pandemic

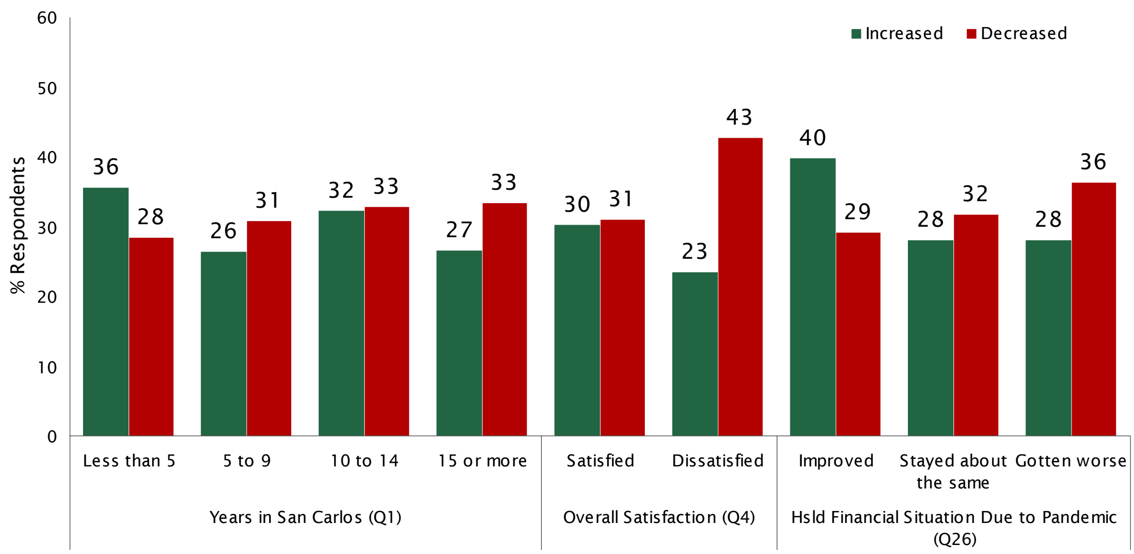


Figure 40 Percentage of Hsld Retail Shopping Dollars Increase Since Pandemic by Employment Status & Children in Hsld

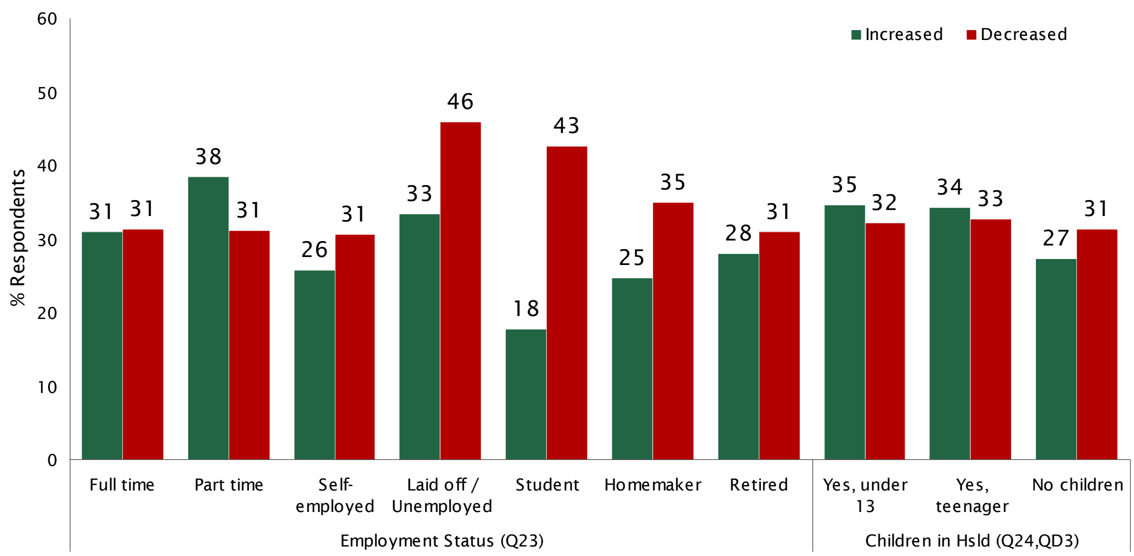
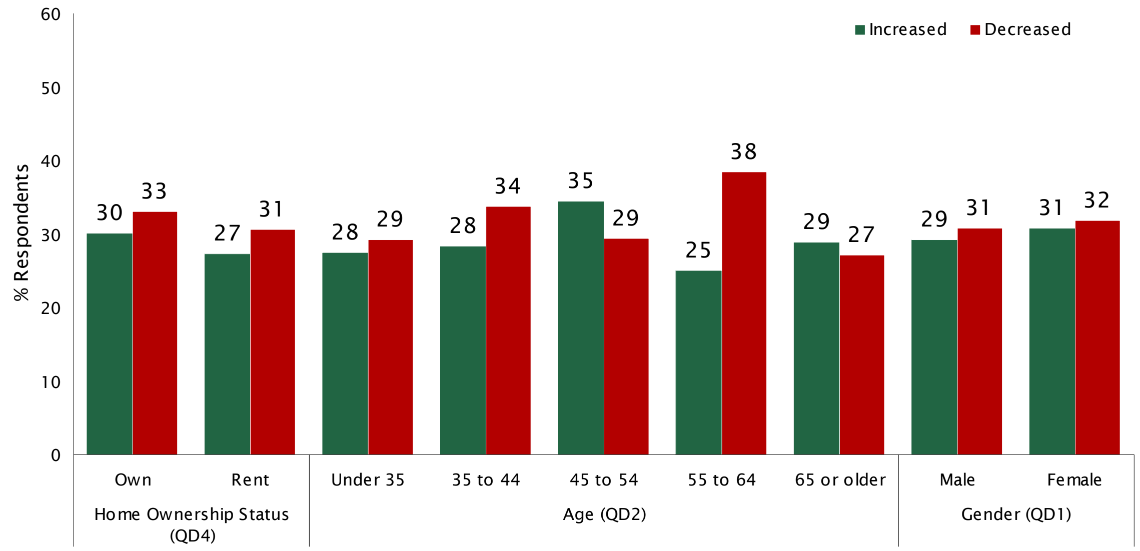


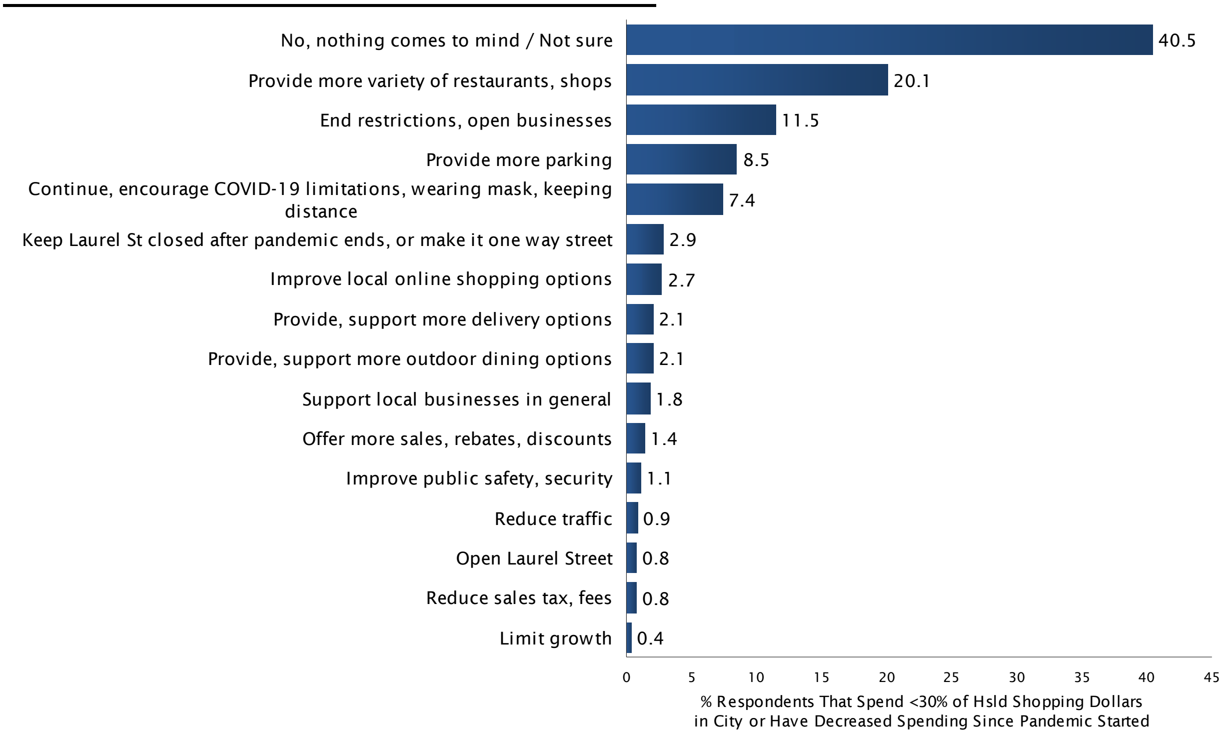
Figure 41 Percentage of Hsld Retail Shopping Dollars Increase Since Pandemic by Home Ownership Status, Age & Gender



ACTIONS TO PROMPT MORE LOCAL SPENDING Residents who reported that they spend less than 30% of their retail shopping dollars in San Carlos and/or decreased the percentage of their local spending in the past year were subsequently asked if there was a specific action the City could take that would prompt them to do more of their shopping in San Carlos.

Question 22 *Is there a specific action the City could take that would prompt you to do more of your shopping in San Carlos?*

Figure 42 Action to Prompt More Shopping Within City



Question 22 was presented in an open-ended manner, which allowed residents to respond in their own words without being prompted by or constrained to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 42. Although 41% indicated that no changes came to mind, the remaining respondents did share ideas on what would cause them to shop San Carlos more frequently—with the most common being providing a greater variety of restaurants and shops (20%), ending pandemic restrictions/opening local businesses (12%), providing more parking (9%), continuing practices to ensure safety during the pandemic including social distancing and masks (7%), keeping Laurel Street closed to vehicle traffic or making it a one-way street after the pandemic (3%), and improving *local* online shopping opportunities (3%).

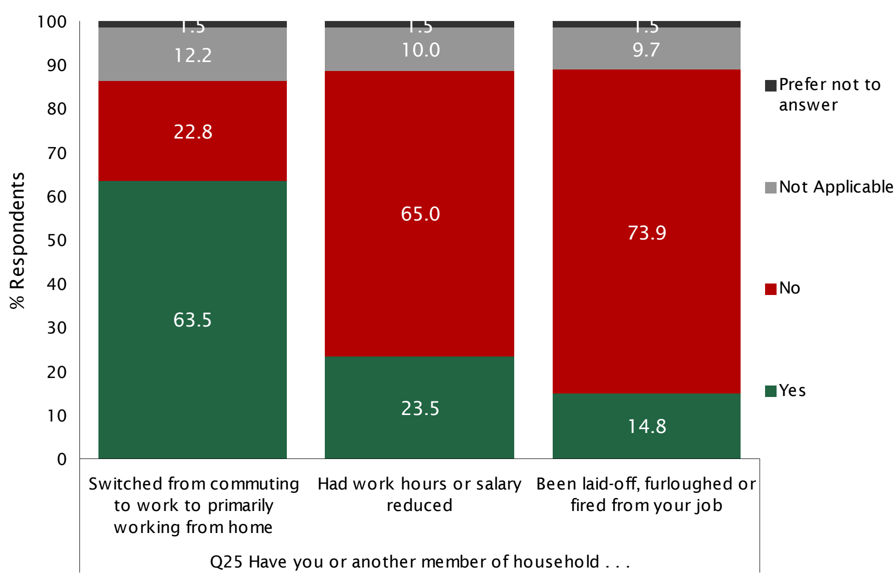
COVID-19 Impacts

The arrival of coronavirus in California triggered a statewide shelter-in-place mandate in March 2020, effectively shuttering many sectors of the world's fifth largest economy for several months and sending ripple effects through most aspects of daily life. In addition to the direct economic impacts including job losses, salary cuts, and reduced spending, the threat of COVID-19 and the off-and-on closure of non-essential businesses dramatically altered how and where people work, play, shop, and travel. The 2021 community survey included several pandemic-related questions to provide the City with a better understanding of how the pandemic has impacted key aspects of San Carlos residents' lives.

WORK AND COMMUTE The first question in this series asked residents to describe how the pandemic may have impacted their household's work experiences and commute. As shown in Figure 43 below, nearly two-thirds (64%) of respondents indicated that at least one member of their household had switched from commuting to work to primarily working from home during the past year. Nearly one-quarter of respondents (24%) reported that they and/or another member of their household had their work hours or salary reduced during the pandemic, while 15% also reported that they and/or another member of their household had been laid-off or furloughed.

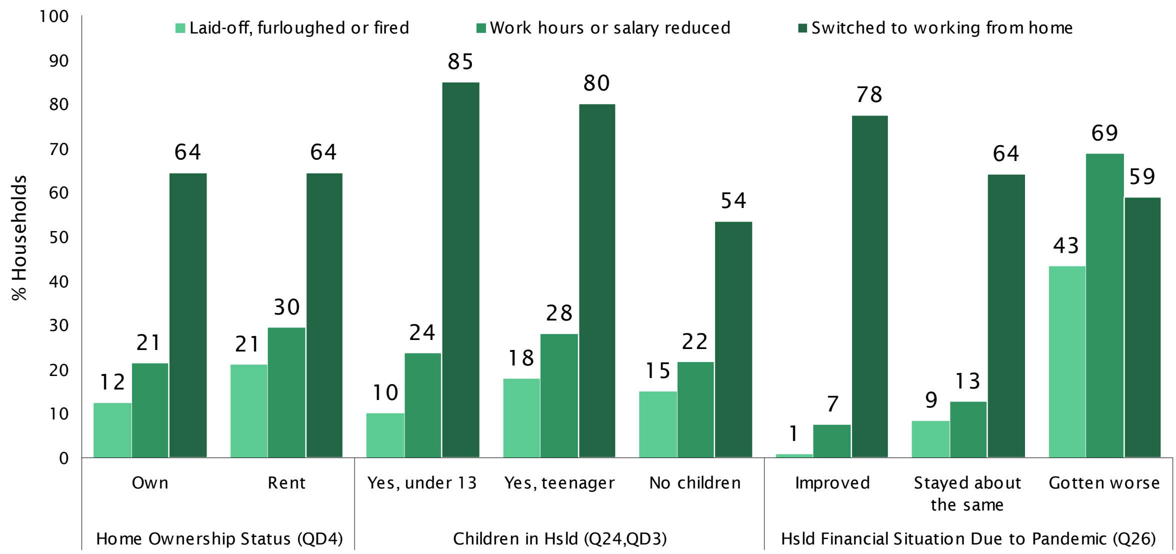
Question 25 *The COVID-19 pandemic has impacted residents' work arrangements and living situations in different ways. During the pandemic have you or another member of your household: _____?.*

Figure 43 COVID-19 Impacted Residents' Work Arrangements & Living Situations



The impacts of the pandemic have not been felt evenly across the community (see Figure 44). When compared to homeowners, those who rent their residence in San Carlos were more likely to experience reductions to their hours or salary during the pandemic, as well as layoffs. The same is true for household's with a teenager and those who indicated their financial situation worsened with the pandemic.

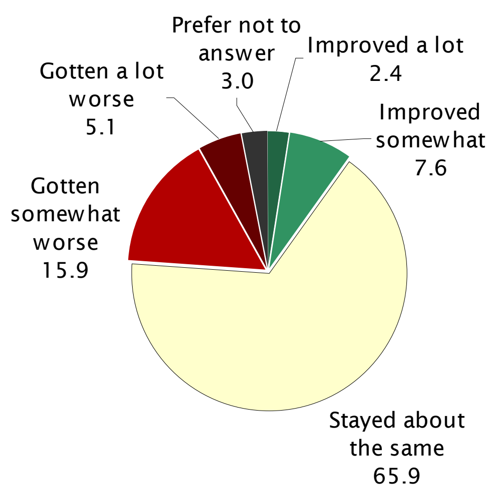
FIGURE 44 COVID-19 IMPACTED RESIDENTS' WORK ARRANGEMENTS & LIVING SITUATIONS BY HOME OWNERSHIP STATUS, CHILDREN IN HSLD & HSLD FINANCIAL SITUATION DUE TO PANDEMIC



FINANCIAL IMPACTS OF PANDEMIC After profiling the impacts of the pandemic on their work situation and commute, the survey transitioned to asking respondents about the impact of the pandemic on their household's financial situation. Most San Carlos residents (66%) indicated that their household's financial situation had not been impacted by the pandemic—it had stayed about the same (see Figure 45). Approximately 10% indicated that the pandemic had improved their household's financial situation, whereas one-in-five (21%) reported that their household's financial situation had worsened during this period. An additional 3% preferred to not answer the question.

Question 26 *How has your household's financial situation been impacted by the pandemic? Has it improved a lot, improved somewhat, stayed about the same, gotten somewhat worse, or gotten a lot worse?*

FIGURE 45 OPINION OF HSLD'S FINANCIAL SITUATION IMPACTED BY PANDEMIC



The financial impacts of the pandemic are strongly correlated with residents' employment status, and to a lesser degree with their homeownership status (see figures 46-48). Although the high percentage of respondents who were laid-off/furloughed that indicated their financial situation has worsened during the pandemic is to be expected, it is striking that those who were self-employed or working part-time were also likely to report their financial situation worsened during this period. Renters were also more likely to report having financial difficulties during the pandemic when compared to home owners.

FIGURE 46 OPINION OF HSLD'S FINANCIAL SITUATION IMPACTED BY PANDEMIC BY YEARS IN SAN CARLOS, OVERALL SATISFACTION & CHILDREN IN HSLD

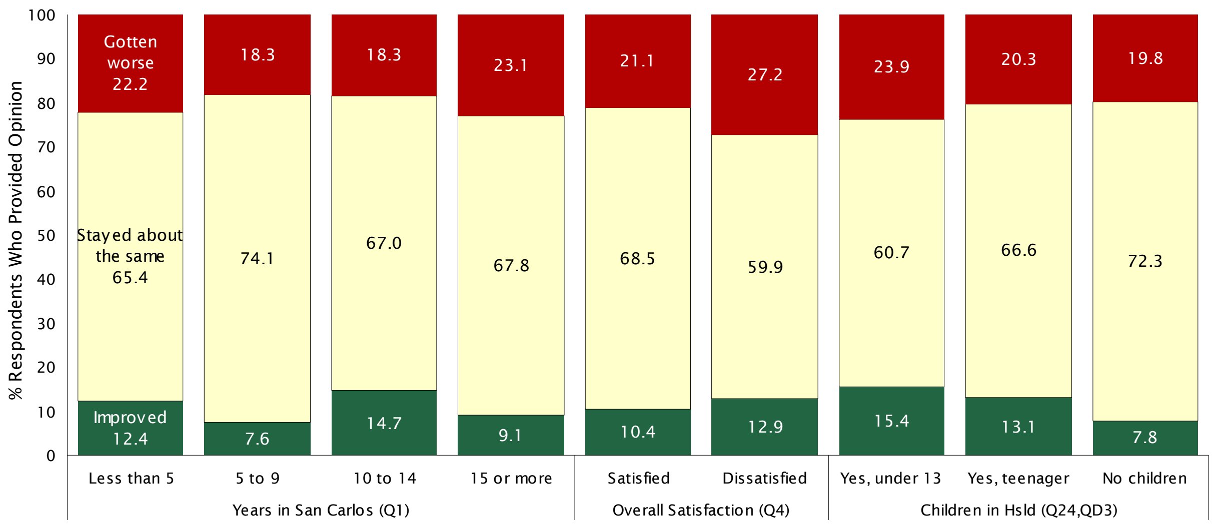


FIGURE 47 OPINION OF HSLD'S FINANCIAL SITUATION IMPACTED BY PANDEMIC BY EMPLOYMENT STATUS & HOME OWNERSHIP STATUS

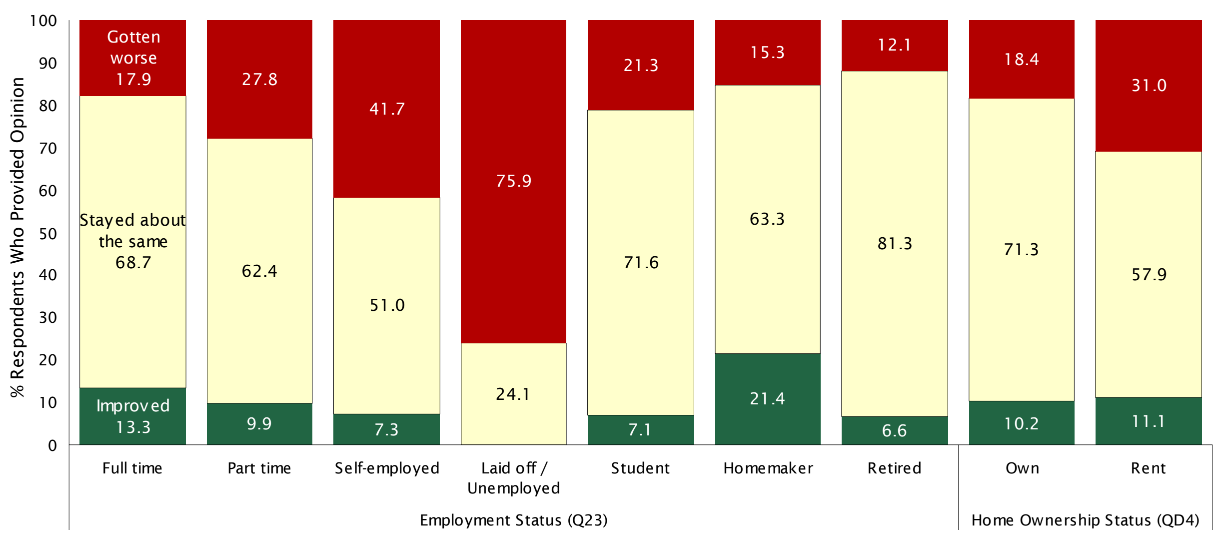
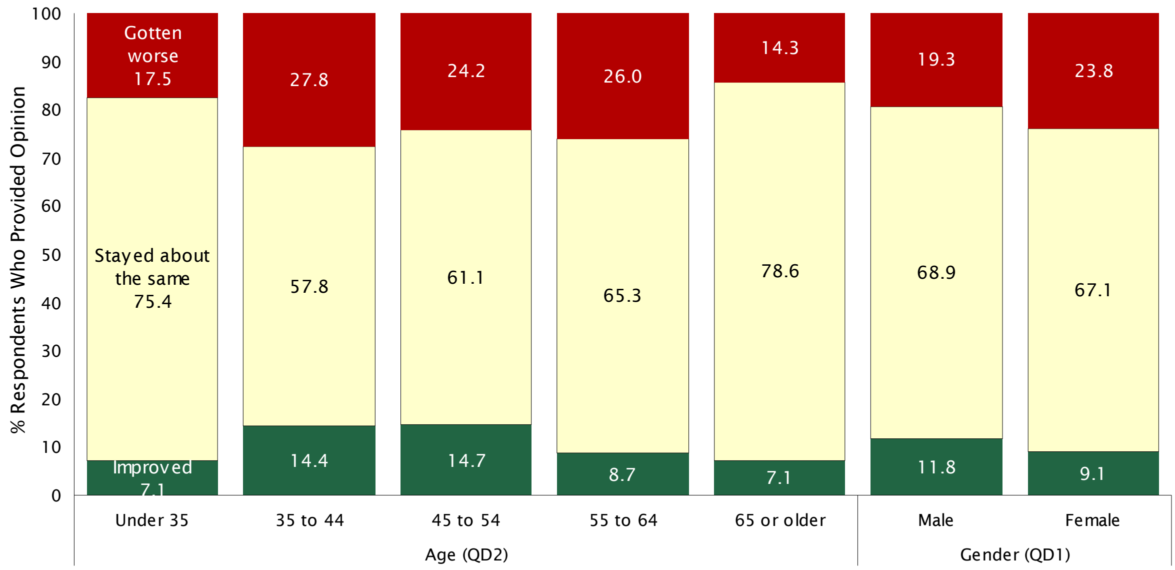


FIGURE 48 OPINION OF HSLD'S FINANCIAL SITUATION IMPACTED BY PANDEMIC BY AGE & GENDER

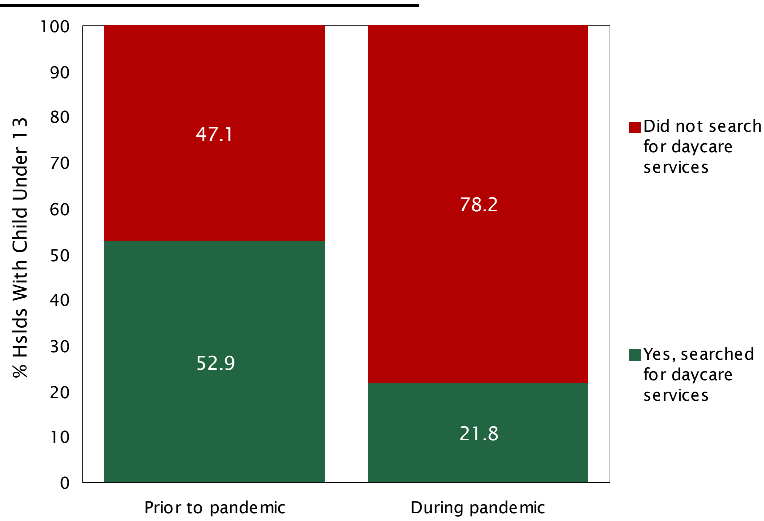


DAYCARE SERVICES IN SAN CARLOS Finding suitable childcare services can be a challenge for some families, and the pandemic was expected to make this challenge even more difficult as many childcare providers closed their programs to follow public health regulations and guidelines. To get a sense for how the pandemic has impacted the availability of suitable childcare services in San Carlos, respondents with at least one child under 13 in their home were first screened to ask about whether they had searched for daycare services for their child in San Carlos *before* and *during* the pandemic.

Question 27 *Prior to the pandemic, in 2019 had you searched for daycare services for your child in San Carlos?*

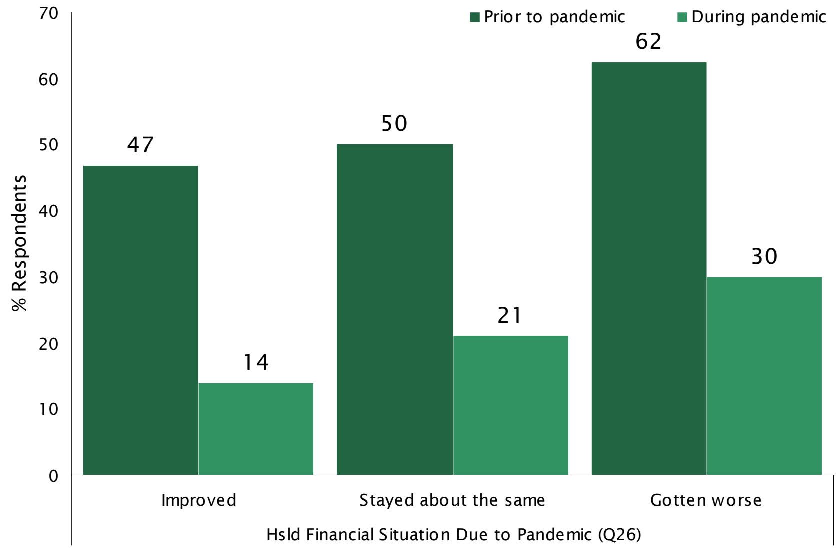
Question 29 *What about during the pandemic - have you searched for daycare services for your child in San Carlos?*

FIGURE 49 SEARCHED FOR DAYCARE SERVICES



More half of those with a child under 13 in their household (53%) indicated that they had searched for daycare services in San Carlos prior to the pandemic. Approximately one-in-five (22%) reported doing the same during the pandemic (see Figure 49). The survey data also reveal that a household's financial situation during the pandemic was correlated with their search for daycare both before and during the pandemic, with households that experienced financial hardship during the past year being the most likely to have searched for childcare in San Carlos in both periods (see Figure 50).

FIGURE 50 SEARCHED FOR DAYCARE SERVICES BY HSLD FINANCIAL DUE TO PANDEMIC

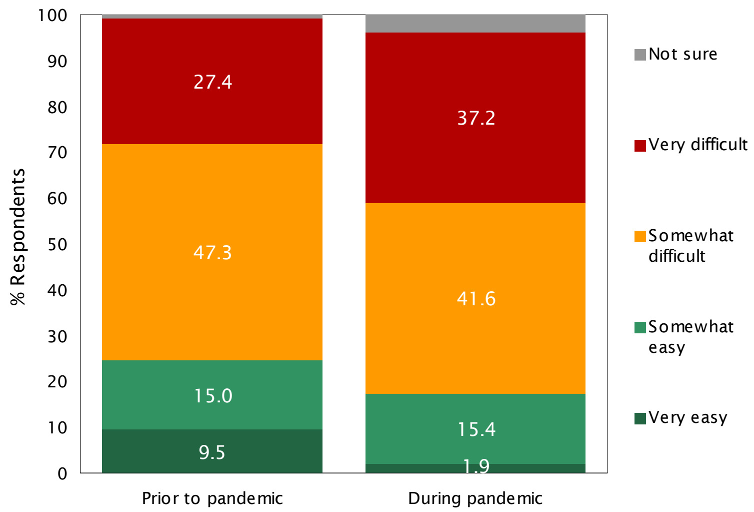


Having established which respondents had searched for childcare services in San Carlos (and when), the survey next asked these individuals to rate how easy or difficult it was to find suitable daycare services in San Carlos. As expected, the pandemic appears to have made the challenge of finding local daycare services more difficult (see Figure 51 on the next page). Among those who had searched for daycare services in San Carlos *prior* to the pandemic, three-quarters stated that it was difficult to find (27% very difficult, 47% somewhat difficult), whereas one-quarter indicated it was either somewhat easy (15%) or very easy (10%) to find. During the pandemic, eight-in-ten rated the challenge of finding suitable daycare in San Carlos as very difficult (37%) or somewhat difficult (42%), while the percentage who found it somewhat or very easy declined to less than one-in-five (17%).

Question 28 *Prior to the pandemic, how easy or difficult was it to find suitable daycare services for your child in San Carlos?*

Question 30 *During the pandemic, would you say it has been very easy to find suitable daycare services in San Carlos, somewhat easy, somewhat difficult, or very difficult?*

FIGURE 51 EASE OF FINDING DAYCARE SERVICES BEFORE AND DURING PANDEMIC



BACKGROUND & DEMOGRAPHICS

Table 13 presents the key demographic information collected during the survey by study year. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of adult residents in the City of San Carlos. The primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics (see Appendix A for more details).

TABLE 13 DEMOGRAPHICS OF SAMPLE BY STUDY YEAR

	Study Year				
	2021	2020	2018	2016	2014
Total Respondents	*720*	*744*	*560*	*754*	*410*
Q1 Years in San Carlos					
Less than 5	17.7	19.4	26.5	20.1	20.2
5 to 9	11.2	16.0	16.8	16.6	16.7
10 to 14	14.7	13.4	13.0	14.4	16.2
15 or more	56.2	51.0	43.4	47.9	46.6
Prefer not to answer	0.1	0.2	0.2	1.0	0.2
QD1 Gender					
Male	46.7	47.7	48.1	43.9	46.8
Female	48.9	49.6	48.1	49.7	48.5
Prefer not to answer	4.4	2.7	3.9	6.3	4.6
QD2 Age					
18 to 34	18.3	18.6	18.4	17.1	16.5
35 to 44	19.3	18.9	19.8	19.1	21.2
45 to 54	19.9	20.5	20.8	19.2	19.3
55 to 64	18.6	17.7	19.4	15.2	16.3
65 or older	19.9	18.4	18.6	16.3	15.4
Prefer not to answer	4.0	5.9	3.0	13.0	11.2
Q24 Child in household					
Yes	35.8	35.6	36.3	38.2	44.0
No	61.6	58.7	59.8	57.9	52.2
Prefer not to answer	2.6	5.7	3.9	3.9	3.9
QD4 Home ownership status					
Own	77.9	73.6	78.1	82.9	80.6
Rent	19.6	22.0	20.7	13.1	19.1
Prefer not to answer	2.5	4.4	1.3	4.0	0.2
Q23 Employment status					
Full time	49.2	57.7	57.8	60.8	N/A
Part time	5.3	10.0	8.9	10.5	N/A
Self-employed	8.9	N/A	N/A	N/A	N/A
Laid off / Unemployed	3.3	N/A	N/A	N/A	N/A
Student	3.1	4.0	6.7	2.9	N/A
Home-maker	3.3	2.2	2.5	3.4	N/A
Retired	24.1	20.3	17.4	16.4	N/A
In-between jobs	N/A	1.1	1.9	1.7	N/A
Prefer not to answer	2.8	4.8	4.7	4.4	N/A

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 who had interacted with city staff in the past 12 months were asked to rate aspects of their experience with staff. The questionnaire included with this report (see *Questionnaire & Toplines* on page 61) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

Many of the questions asked in the 2021 survey were tracked directly from the 2020 survey to allow the City to monitor its performance and residents' opinions on key issues over time.

PROGRAMMING & PRE-TEST Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the phone 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 of San Carlos 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 participate in the survey. Households were recruited to participate in the survey through multiple recruiting methods. Using a combination of mailed and emailed invitations, households were initially invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Each household was assigned a unique passcode to ensure that only San Carlos residents who received an invitation could access the online survey site. Following a period of online data collection, True North began placing calls to land lines and cell phone numbers of households throughout the City that had yet to participate in the online survey as a result of the emailed or mailed invitation.

Phone interviews averaged 18 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 720 completed surveys were gathered online and by phone between January 7 and January 25, 2021.

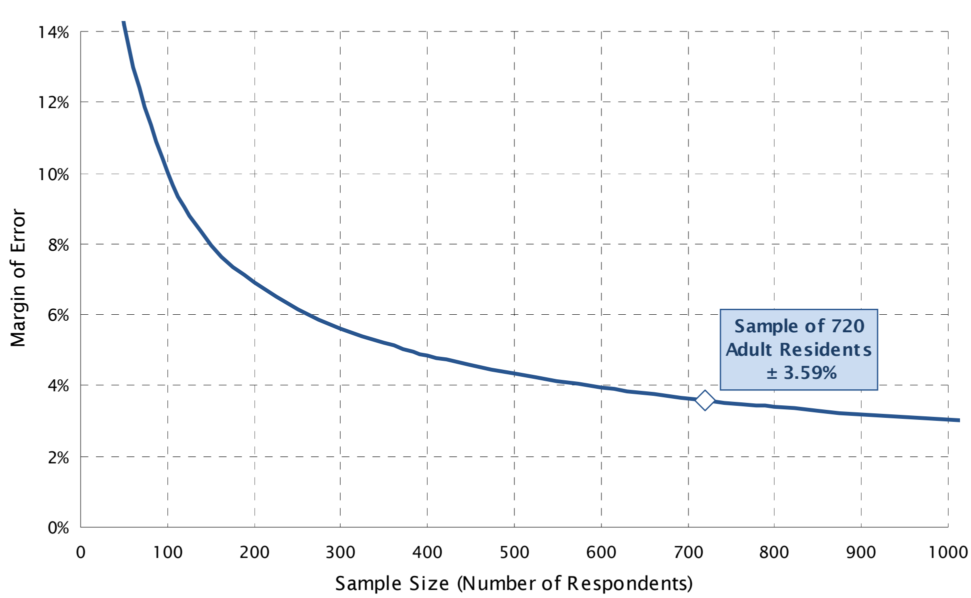
MARGIN OF ERROR DUE TO SAMPLING The results of the survey can be used to estimate the opinions of all adult residents of the City. Because not every adult resident of the City participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 720 adult residents for a particular question and what would have been found if all of the estimated 22,685 adult residents[4] had been interviewed.

For example, in estimating the percentage of adults who have been in contact with City of San Carlos staff in the past 12 months (Question 11), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

$$\hat{p} \pm t\sqrt{\left(\frac{N-n}{N}\right)\frac{\hat{p}(1-\hat{p})}{n-1}}$$

where $\hat{p}$ is the proportion of adults who said had been in contact with staff (0.36 for 36% in this example), N is the population size of all adults (22,685), n is the sample size that received the question (720), and t is the upper $\alpha/2$ point for the t-distribution with $n-1$ degrees of freedom (1.96 for a 95% confidence interval). Solving the equation using these values reveals a margin of error of ± 3.39%. This means that with 36% of survey respondents indicating they had contact with city staff in the past 12 months, we can be 95 percent confident that the actual percentage of *all* adult residents in San Carlos in contact with staff during this period is between 33% and 39%.

FIGURE 52 MAXIMUM MARGIN OF ERROR



4. Source: U.S. Census Bureau, 2019 American Community Survey 5-Year Estimates.

Figure 52 on the prior page 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 (i.e., $\hat{p} = 0.5$). For this survey, the maximum margin of error is ± 3.59% for questions answered by all 720 respondents.

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 52 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. Where appropriate, tests of statistical significance were conducted to evaluate changes in responses between the 2020 and 2021 studies. The final data were weighted to balance the sample by age according to Census estimates.

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 tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that sum to slightly more or less than 100%.

City of San Carlos
Community Satisfaction Survey '21
Final Toplines (n = 720)
January 26, 2021

Section 1: Introduction to Study				
Hi, my name is _____ and I'm calling on behalf of TNR, an independent public opinion research company. We're conducting a survey about important issues in San Carlos and we would like to get your opinions.				
If needed: This is a survey about community issues in San Carlos– I'm NOT trying to sell anything and I won't ask for a donation. *If needed:* The survey should take about 12 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 needed:* If you prefer, you can also take the survey online at your convenience at: <<insert URL>>. *Provide unique password.* *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: Screener for Inclusion in the Study – Phone Only				
Use if land line: For statistical reasons, I would like to speak to the youngest adult male currently at home that is at least 18 years of age. *If there is no male currently at home that is at least 18 years of age, then ask:* Ok, then I'd like to speak to the youngest female currently at home that is at least 18 years of age. *If there is no adult currently available, then ask for a callback time.* *NOTE: Adjust this screener as needed to match sample quotas on gender & age*				
If respondent asks why we want to speak to a particular demographic group, explain: Its important that the sample of people for the survey is representative of the adult population in the city for it to be statistically reliable. At this point, we need to balance our sample by asking for people who fit a particular demographic profile.				
SC1	To begin, what is the zip code at your residence? *Read zip code back to them to confirm correct*			
	1	94070	100%	*Go to Q1*
	2	Any other ZIP code	0%	*Terminate*

Section 3: Quality of Life			
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	5%
	2	1 to 4 years	12%
	3	5 to 9 years	11%
	4	10 to 14 years	15%
	5	15 years or longer	56%
	99	Prefer not to answer	0%

Q2	How would you rate the overall quality of life in San Carlos? Would you say it is excellent, good, fair, poor or very poor?		
	1	Excellent	41%
	2	Good	50%
	3	Fair	8%
	4	Poor	1%
	5	Very Poor	1%
	98	Not sure	0%
	99	Prefer not to answer	0%
Q3	If the city government could change one thing to make San Carlos a better place to live now and in the future, what change would you like to see? Verbatim responses recorded and later grouped into categories shown below.		
	Limit growth, development		18%
	Reduce traffic congestion		13%
	Not sure / Cannot think of anything		12%
	Improve, address parking issues		8%
	Improve public safety		7%
	Provide affordable housing		7%
	Add, improve sidewalks, bike lanes		6%
	No changes / Everything is fine		6%
	Enforce traffic laws		5%
	Improve city planning, development		5%
	Improve, maintain infrastructure		4%
	Provide, improve parks, rec areas		4%
	Improve, preserve walkability, keep Laurel Street closed		4%
	Improve schools, education		3%
	Address COVID-19 issues, concerns		3%
	Improve, encourage cultural diversity		3%
	Cleaner city, improve landscape		2%
	Maintain small town feeling		2%
	Improve City Council, government process, transparency		2%
	Improve shopping, dining options		2%
	Maintain outdoor dining after pandemic ends		2%

Section 4: City Services		
Next, I would like to ask a series of questions about services provided by the City of San Carlos.		
Q4	Generally speaking, are you satisfied or dissatisfied with the job the City of San Carlos is doing to provide city services? *Get answer, then ask:* Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?	
1	Very satisfied	32%
2	Somewhat satisfied	50%
3	Somewhat dissatisfied	9%
4	Very dissatisfied	4%
98	Not sure	5%
99	Prefer not to answer	0%

Q5 For each of the services I read, please tell me whether the service is extremely important to you, very important, somewhat important, or not at all important.

	Randomize	Extremely Important	Very Important	Somewhat Important	Not at all Important	Not sure	Prefer not to answer
A	Providing police services	57%	28%	12%	3%	0%	0%
B	Maintaining a low crime rate	66%	27%	6%	1%	0%	0%
C	Preparing the City for fire, police and public works emergencies	59%	32%	7%	0%	0%	0%
D	Providing fire protection, prevention and emergency medical services	69%	27%	3%	0%	0%	0%
E	Reducing traffic congestion on city streets	37%	32%	26%	5%	0%	0%
F	Providing library services	37%	37%	22%	3%	0%	0%
G	Providing trash collection and recycling services	53%	38%	8%	1%	1%	0%
H	Keeping public buildings and facilities clean and attractive	26%	45%	27%	2%	0%	0%
I	Maintaining local streets	42%	47%	10%	0%	0%	0%
J	Providing parks, sports fields and recreation facilities	41%	42%	17%	0%	0%	0%
K	Maintaining storm drains, sewers and creeks	48%	39%	12%	1%	0%	0%
L	Providing recreation programs for youth	30%	41%	23%	5%	1%	0%
M	Providing recreation programs for adults and seniors	18%	34%	36%	9%	1%	0%
N	Providing more public parking downtown	20%	29%	36%	14%	1%	0%
O	Holding special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk & others	20%	32%	38%	9%	1%	0%

P	Promoting economic development to stimulate the local economy	23%	39%	29%	7%	2%	0%
Q	Preserving community character and appearance through building and planning permits, inspections and code enforcement	28%	36%	27%	8%	1%	0%
R	Providing safe streets	61%	28%	9%	1%	0%	0%
S	Providing affordable housing	23%	27%	28%	19%	2%	1%
T	Establishing and maintaining financial reserves	27%	43%	23%	4%	2%	0%
U	Responding to the COVID-19 pandemic	49%	29%	15%	6%	1%	0%
V	Having city-provided resources and facilities available to residents during PG&E power shut-offs	26%	32%	30%	10%	1%	0%

Q6	For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the city is doing to provide the service. Are you satisfied or dissatisfied with the city's efforts to: _____, or do you not have an opinion? *Get answer. If 'satisfied' or 'dissatisfied', then ask*: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?						
	Randomize	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide police services	34%	40%	11%	7%	8%	1%
B	Maintain a low crime rate	40%	39%	10%	5%	6%	0%
C	Prepare the City for fire, police and public works emergencies	26%	38%	8%	3%	23%	2%
D	Provide fire protection, prevention and emergency medical services	40%	38%	4%	2%	15%	1%
E	Reduce traffic congestion on city streets	13%	37%	27%	16%	6%	1%
F	Provide library services	49%	36%	2%	2%	9%	1%
G	Provide trash collection and recycling services	52%	36%	4%	2%	5%	1%
H	Keep public buildings and facilities clean and attractive	38%	47%	4%	2%	8%	1%
I	Maintain local streets	22%	44%	21%	9%	3%	1%
J	Provide parks, sports fields and recreation facilities	42%	43%	7%	2%	5%	1%
K	Maintain storm drains, sewers and creeks	30%	46%	7%	3%	13%	1%
L	Provide recreation programs for youth	33%	37%	5%	1%	22%	2%
M	Provide recreation programs for adults and seniors	25%	39%	4%	2%	28%	2%
N	Provide more public parking downtown	24%	37%	20%	10%	8%	2%
O	Hold special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk & others	45%	34%	6%	2%	12%	2%

P	Promote economic development to stimulate the local economy	14%	40%	11%	5%	27%	2%
Q	Preserve community character and appearance through building and planning permits, inspections and code enforcement	22%	37%	16%	9%	15%	1%
R	Provide safe streets	31%	42%	16%	7%	4%	0%
S	Provide affordable housing	8%	24%	17%	18%	28%	5%
T	Establish and maintain financial reserves	14%	30%	5%	3%	44%	3%
U	Respond to the COVID-19 pandemic	26%	40%	10%	6%	15%	3%
V	Have city-provided resources and facilities available to residents during PG&E power shut-offs	10%	27%	11%	6%	43%	3%

Section 5: Biking in San Carlos			
Q7	Would you say it is generally safe or unsafe to **ride a bike** on city streets in San Carlos?		
	1	Safe	56%
	2	Unsafe	26%
	98	Not sure	17%
	99	Prefer not to answer	1%
Q8	Beginning in June of this year, the City of San Carlos established **bike loops** on Saturdays and Sundays to encourage exercise through bicycling, jogging and walking and to provide residents with an alternative means to travel Downtown. Have you used the bike loops to bike or walk on the weekends?		
	1	Yes	17%
	2	No	82%
	99	Prefer not to answer	0%

Section 6: Local Governance & Customer Service							
Q9	Next, I'm going to read you a series of statements about the City of San Carlos. For each, I'd like you to tell me whether you agree or disagree with the statement. Here is the (first/next) one: _____. Do you agree or disagree, or do you not have an opinion? *If agree or disagree, ask*: Would that be strongly (agree/disagree) or somewhat (agree/disagree)?						
	Randomize	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not sure	Prefer not to answer
A	The City is **responsive** to residents' needs	12%	44%	18%	8%	16%	1%
B	The City manages its **finances** well	13%	35%	9%	4%	37%	2%
C	The City **listens** to residents when making important decisions	10%	38%	20%	10%	21%	1%
D	I **trust** the City of San Carlos	21%	50%	13%	7%	8%	1%

Q10	How much attention do you pay to the issues, decisions and activities of your City government? Would you say that you are very attentive, somewhat attentive, slightly attentive, or not at all attentive?	
1	Very attentive	11%
2	Somewhat attentive	47%
3	Slightly attentive	34%
4	Not at all attentive	7%
98	Not sure	0%
99	Prefer not to answer	1%

Q11	In the past 12 months, have you been in contact with staff from the City of San Carlos?		
1	Yes	36%	*Ask Q12*
2	No	59%	*Skip to Q13*
98	Not sure	4%	*Skip to Q13*
99	Prefer not to answer	1%	*Skip to Q13*

Q12	In your opinion, was the staff at the City very _____, somewhat _____, or not at all _____. *Read one item at a time, continue until all items are read.*					
	Randomize	Very	Somewhat	Not at all	Not sure	Prefer not to answer
A	Helpful	45%	33%	20%	1%	2%
B	Professional	64%	25%	8%	1%	2%
C	Accessible	46%	43%	8%	0%	2%

Section 7: Communication			
Q13	Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, television, and other means? *Get answer, then ask:* Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
	1	Very satisfied	35%
	2	Somewhat satisfied	48%
	3	Somewhat dissatisfied	9%
	4	Very dissatisfied	2%
	98	Not sure	6%
	99	Prefer not to answer	0%
Q14	What information sources do you use to find out about City of San Carlos news, events, and programs? *Don't read list. Record up to first 3 responses.*		
Newsletters and Newspapers			
	1	City Newsletters/Good Living community newsletter	64%
	2	*San Francisco **Chronicle*** (daily newspaper)	5%
	3	*San Mateo County **Times*** (daily newspaper)	2%
	4	*San Mateo Daily **Journal*** (daily newspaper)	13%
	5	*Daily Post* (daily newspaper)	5%
	6	*Other newspaper*	2%
	7	*San Carlos Patch* (online newspaper)	12%
TV, Radio & Meetings			
	8	San Carlos TV/Channel 27	2%
	9	Television (general)	3%
	10	City Council Meetings	4%
	11	Radio	0%
Internet & Email			
	12	City's website	25%
	13	Internet (not City's site)	12%
	14	Email notification from City	21%
	15	Blogs	0%
Social Media			
	16	Facebook	8%
	17	Twitter	2%
	18	Next Door	28%
	19	Instagram	2%

	20	Other social media site	1%
Mail/Posters/Other			
	21	Postcards, letters, flyers or brochures (mailed to home)	17%
	22	Flyers, brochures or posters (displayed at public facilities)	4%
	23	Street banners	9%
	24	New Billboard at Adult Community Center	1%
	25	Friends/Family/Associates	12%
	26	Other	0%
	27	Do Not Receive Information about City	1%
	98	Not sure	0%
	99	Prefer not to answer	0%

Q15	As I read the following ways that the City of San Carlos can communicate with residents, I'd like to know if you think they would be very effective, somewhat effective, or not an effective way for the City to communicate with you.					
	Randomize	Very Effective	Somewhat Effective	Not Effective	Not sure	Prefer not to answer
A	E-mail and E-notify	56%	32%	6%	5%	2%
B	Postcards, letters and newsletters mailed to your home	47%	39%	10%	4%	1%
C	City's Website	29%	47%	15%	7%	1%
D	Advertisements in local papers	7%	21%	58%	12%	2%
E	Social media like Facebook, Twitter and Next Door	30%	36%	24%	9%	2%
F	Townhall meetings	11%	36%	37%	14%	2%
G	Television programs on Comcast Cable Channel 27 and AT&T Channel 99	4%	16%	59%	20%	2%
H	Shape San Carlos – a virtual townhall forum on the City's website	12%	30%	34%	22%	2%
I	New Billboard at the Adult Community Center	10%	26%	45%	18%	2%

Section 8: Development & Housing

Next, I would like to ask a few questions about the availability of **housing** in the City of San Carlos.

Q16	As I read the following housing types, please tell me whether you feel there is currently too much, about the right amount, or too little of this type of housing in the City of San Carlos.					
	Randomize	Too Much	About Right	Too Little	Not sure	Prefer not to answer
A	Housing that is affordable for **middle-income** families	3%	23%	53%	20%	1%
B	Housing that is affordable for **low-income** families	9%	14%	47%	28%	2%
C	Single family homes	10%	65%	13%	11%	1%
D	Condominiums	27%	39%	12%	21%	1%
E	Apartments with 7 or more units	30%	29%	12%	27%	2%
F	Apartments with 6 units or less	11%	38%	17%	32%	1%
G	Townhomes	16%	42%	17%	24%	1%
H	Senior housing	2%	34%	26%	37%	1%
I	Accessory dwelling units – also referred to as granny flats or guest houses	6%	18%	31%	42%	2%
J	Special needs housing for families and individuals who need support services like jobs training and social services	5%	13%	29%	51%	2%
K	Interim housing to help people trying to transition from being homeless	8%	12%	31%	47%	3%

Q17	In the past three years, would you say the pace of development in San Carlos has been too fast, about right, or too slow?	
1	Too fast	49%
2	About right	34%
3	Too slow	9%
98	Not sure	9%
99	Prefer not to answer	0%

Section 9: Funding Priorities

Like most cities in California, the City of San Carlos is having to make budget cuts due to the pandemic and associated economic downturn. Your opinions will help the City set priorities during this difficult period.

Q18 As I read each of the following items, please indicate whether you think the City should make the item a high priority, a medium priority, or a low priority for future city spending. If you feel the City should not spend any money on this item, just say so. Please keep in mind that not all of the items can be high priorities.

Here is the (first/next) one: _____. Should this item be a high, medium or low priority for the City – or should the City not spend any money on this item?

	Randomize	High Priority	Medium Priority	Low Priority	Should not spend money	Not sure	Prefer not to answer
A	Police services	64%	24%	7%	3%	1%	0%
B	Fire protection services	78%	18%	3%	0%	1%	0%
C	Street maintenance and repair	51%	40%	7%	0%	1%	0%
D	Infrastructure maintenance and repair	50%	42%	6%	0%	1%	0%
E	Recreation programs and services	20%	46%	29%	5%	1%	0%
F	Park and landscape maintenance	24%	58%	17%	1%	0%	0%
G	Community events and activities	13%	37%	42%	8%	1%	0%
H	Housing programs	26%	30%	26%	14%	3%	0%
I	Public transportation	18%	41%	31%	8%	2%	0%
J	Bicycle and pedestrian access/ improvements	22%	38%	30%	9%	1%	0%
K	Community outreach including meetings and mailings	8%	44%	39%	6%	2%	1%
L	Environmental sustainability/green programs	28%	38%	24%	9%	1%	1%

Q19 Is there another item or project not already mentioned that you think should be a **high** priority for the City to fund? *If yes, ask:* Please describe it to me. Verbatim responses recorded and later grouped into categories shown below.

No other high priorities / None come to mind	65%
Prefer not to answer	6%
Reduce traffic	3%
Address COVID-19 issues, concerns	3%
Improve education, add more schools	2%
Improve public safety, more police patrols	2%
Enforce traffic laws	2%
Provide more affordable housing	2%
Provide more rec centers, facilities	2%

Address environmental issues, preparedness	2%
Maintain city infrastructure, sidewalks	2%
Improve economy, support for local business	2%
Limit growth, maintain open space	1%
Beautify City, landscaping	1%
Provide public transportation	1%
Address homeless issue	1%
Provide more activities, events for all ages	1%
Address parking issues	1%
Improve city planning, development	1%
Have cultural, community events on Laurel Street, keep it closed	1%
Provide assistant for seniors, disabled	1%

Section 10: Local Businesses

Q20	What percentage of your household's total shopping dollars do you spend locally in the City of San Carlos? *(If they are uncertain, ask them to estimate).*	
1	Less than 10%	8%
2	10% to 19%	14%
3	20% to 29%	12%
4	30% to 39%	12%
5	40% to 49%	7%
6	50% to 59%	13%
7	60% to 69%	8%
8	70% to 79%	7%
9	80% to 89%	5%
10	90% to 100%	2%
98	Not sure	10%
99	Prefer not to answer	1%

Q21	Since the pandemic started, has the **percentage** of your total shopping dollars that you spend in San Carlos increased, stayed about the same, or decreased?	
1	Increased	29%
2	Stayed about the same	36%
3	Decreased	32%
98	Not sure	2%
99	Prefer not to answer	1%

	Ask Q22 if Q20 = (1,2,3) OR Q21 = 3.	
Q22	Is there a specific action the City could take that would prompt you to do more of your shopping in San Carlos? *If yes, ask:* Please describe what the City could do. Verbatim responses recorded and later grouped into categories shown below.	
	No, nothing comes to mind / Not sure	40%
	Provide more variety of restaurants, shops	20%
	End restrictions, open businesses	12%
	Provide more parking	8%
	Continue, encourage COVID-19 limitations, wearing mask, keeping distance	7%
	Keep Laurel Street closed after pandemic ends, or make it one way street	3%
	Improve local online shopping options	3%
	Provide, support more outdoor dining options	2%
	Provide, support more delivery options	2%
	Support local businesses in general	2%
	Improve public safety, security	1%
	Reduce traffic	1%
	Open Laurel Street	1%
	Reduce sales tax, fees	1%
	Offer more sales, rebates, discounts	1%

Section 11: COVID-19 Impacts			
Q23	Which best describes your current employment status? Are you employed full-time, employed part-time, self-employed, laid-off or furloughed, not employed but looking for work, a student, a homemaker, or retired?		
	1	Employed full-time	49%
	2	Employed part-time	5%
	3	Self-employed	9%
	4	Laid-off/furloughed	2%
	5	Not employed, but looking for work	1%
	6	Student	3%
	7	Homemaker	3%
	8	Retired	24%
	99	Prefer not to answer	3%

Q24	Do you have one or more children **under** the age of 13 living in your household?					
	1	Yes	25%			
	2	No	74%			
	99	Prefer not to answer	1%			
Q25	The COVID-19 pandemic has impacted residents' work arrangements and living situations in different ways. During the pandemic: _____?					
	Read in Order		Yes	No	Not Applicable	Prefer not to answer
A	Have you or another member of your household been laid-off, furloughed or fired from your job		15%	74%	10%	2%
B	Have you or another member of your household had work hours or salary reduced		24%	65%	10%	2%
C	Did you or another member of your household **switch** from commuting to work to primarily working from home		64%	23%	12%	1%
Q26	How has your household's **financial situation** been impacted by the pandemic? Has it improved a lot, improved somewhat, stayed about the same, gotten somewhat worse, or gotten a lot worse?					
	1	Improved a lot	2%			
	2	Improved somewhat	8%			
	3	Stayed about the same	66%			
	4	Gotten somewhat worse	16%			
	5	Gotten a lot worse	5%			
	99	Prefer not to answer	3%			
Ask Q27 if Q24 = 1. Otherwise skip to intro preceding D1.						
Q27	**Prior** to the pandemic, in 2019 had you searched for daycare services for your child in San Carlos?					
	1	Yes	53%	*Ask Q28*		
	2	No	47%	*Skip to Q29*		
	99	Prefer not to answer	0%	*Skip to Q29*		

Q28	**Prior** to the pandemic, how easy or difficult was it to find suitable daycare services for your child in San Carlos? Would you say it was very easy to find, somewhat easy, somewhat difficult, or very difficult to find?			
	1	Very easy	9%	
	2	Somewhat easy	15%	
	3	Somewhat difficult	47%	
	4	Very difficult	27%	
	98	Not sure	1%	
	99	Prefer not to answer	0%	
Q29	What about **during** the pandemic – have you searched for daycare services for your child in San Carlos?			
	1	Yes	22%	*Ask Q30*
	2	No	78%	*Skip to D1*
	99	Prefer not to answer	0%	*Skip to D1*
Q30	During the pandemic, would you say it has been very easy to find suitable daycare services in San Carlos, somewhat easy, somewhat difficult, or very difficult?			
	1	Very easy	2%	
	2	Somewhat easy	15%	
	3	Somewhat difficult	42%	
	4	Very difficult	37%	
	98	Not sure	4%	
	99	Prefer not to answer	0%	

Section 12: Background & Demographics			
Thank you so much for your participation. I have just a few background questions for statistical purposes.			
D1	What is your gender?		
	1	Male	47%
	2	Female	49%
	3	Not listed	0%
	99	Prefer not to answer	4%

D2	In what year were you born? Year of birth recoded into age categories shown below.		
	18 to 24		6%
	25 to 34		13%
	35 to 44		19%
	45 to 54		20%
	55 to 64		19%
	65 or older		20%
	Prefer not to answer		4%
D3	Do you have a teenager between the ages of 13 and 18 living in your household?		
	1	Yes	17%
	2	No	80%
	99	Prefer not to answer	3%
D4	Do you own or rent your residence in San Carlos?		
	1	Own	78%
	2	Rent	20%
	99	Prefer not to answer	2%
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			