

CITIZEN OPINION SURVEY SUMMARY REPORT

Prepared for the CITY OF SAN CARLOS







**M**AY 2023



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#### INTRODUCTION

Known as the *City of Good Living*, San Carlos is a diverse and welcoming community that offers many of the amenities and experiences that come with living in the greater Bay Area, while also maintaining a charming, small town feel. Encompassing 5.6 square miles in San Mateo County, the City was incorporated in 1925 as a General Law city and is currently home to an estimated 29,837 residents. 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.

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:

- · Profile residents' 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 alternative transportation in San Carlos, development, housing, and funding priorities;
- · 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.

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, 2020, and 2021, and many of the

<sup>1.</sup> Source: State of California, Department of Finance, E-1City/County Population Estimates, January 2022.

questions included in the 2023 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 46). In brief, the survey was administered to a random sample of 721 adults who reside within the City of San Carlos. The survey followed a mixed-method design that employed multiple recruiting methods (email, text, and phone) and multiple data collection methods (phone and online). Administered between April 5 and April 17, 2023, the average interview lasted 18 minutes.

STATISTICAL SIGNIFICANCE As discussed above, many of the figures and tables in this report present the results of questions asked in 2023 alongside the results found in the 2014, 2016, 2018, 2020, and 2021 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 (2021) to the current survey (2023)—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 2023.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the survey in a Question & Answer format. 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 49), 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 sur-

veys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, establishing fiscal priorities, passing revenue measures, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,200 survey research studies for public agencies—including more than 400 studies for California municipalities and special districts.

### KEY FINDINGS

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 2021 Community Opinion Survey and the current study represented a welcome transition out of the COVID-19 pandemic that arrived in early 2020. Although the public health risks have subsided, the pandemic continues to have lingering economic impacts in the form of supply chain issues, product shortages, and stubborn inflation that reached a 40-year high in 2022. Both the cost of housing and the cost of borrowing for a mortgage trended upward in the past 12 months, and equities remain well below where they began last year. Environmental factors have also conspired to make this a difficult period, with weather ranging from severe drought and heat waves to unseasonably low temperatures with higher than average rain, snowfall, and flooding.

Against this turbulent backdrop, San Carlos residents' opinions of their community and city government have remained remarkably stable. Residents continue to be quite satisfied with the City's efforts to provide municipal services and facilities, as well as the quality of life in the City. In 2023, more than eight-in-ten San Carlos residents (83%) were satisfied with the City's overall performance in providing municipal services, which is statistically consistent with both the 2021 and 2020 surveys (see *Overall Satisfaction* on page 11).

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 specific services, with the highest satisfaction scores assigned to the City's efforts to provide library services (97% very or somewhat satisfied), provide trash collection and recycling services (95%), keep public buildings and facilities clean and attractive (94%), hold

special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk, and others (94%), and provide recreation programs for youth (94%).

Of the 21 services that were tested in both 2021 and 2023, only four experienced statistically significant changes in satisfaction during this time period. Most notable was a 25 point drop in satisfaction with the City's efforts to maintain storm drains, sewers, and creeks (89% to 64%) which tracks with the flooding that occurred in January 2023 during a series of storms (see *Specific Services* on page 12).

For 15 of the 23 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 80% of residents (see *Performance Needs & Priorities* on page 18).

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 (91% of) residents surveyed rated the quality of the life in San Carlos as excellent or good, a level that has remained consistent since 2018. Moreover, this sentiment was widespread, with at least 86% 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 8).

How is the City perceived with respect to customer service and governance? Contributing to the positive ratings the City receives for specific service areas is the day-to-day customer service provided by city staff. Indeed, staff at the City of San Carlos are often the "face" of the City for residents who are using city facilities, participating in various programs or events, or in need of assistance from the City on any number of matters. Close to four-in-ten (39% of) respondents indicated that they had been in contact with San Carlos staff at least once during the 12 months prior to the interview (consistent with 2021), and approximately nine-in-ten of those respondents indicated that staff members were very or somewhat professional (94%), accessible (91%), and helpful (86%) (see *City Staff* on page 25).

With regard to local governance, the City was rated highest for resident trust and managing its finances (80% of those who provided an opinion agreed with the statements 'I trust the City of San Carlos' and 'The City manages its finances well'), followed by being responsive to residents' needs (70%) and listening to residents when making important decisions (63%). Positive assessments within this question series remained statistically consistent from 2021 to 2023 (see *Perceptions of City Government* on page 23).

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 9), the list of services and their respective priority status for future city attention (see Performance Needs & Priorities on page 18), and the manner in which residents prioritize among potential funding areas (see Funding Priorities on page 37), the top priorities are: providing fire protection services, repairing/maintaining streets and infrastructure, providing affordable housing (while limiting growth and development), reducing traffic congestion on city streets, maintaining storm drains, sewers, and creeks, and having cityprovided resources and facilities available to residents during PG&E power shut-offs. Although many of these priorities are similar to those identified in past studies, maintaining storm drains, sewers, and creeks and having city-provided resources and facilities available to residents during PG&E power shut-offs have risen in importance since the last study.

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.

municating with San Carlos residents?

How well is the City com- The importance of city communication with residents cannot be overstated. 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 electronic and print newsletters, timely press releases, email, website, and various social media accounts.

> Keeping up with the challenge of communicating with residents has been difficult for many public agencies in recent years. As the number of information sources and channels available to the public have dramatically increased, so too has the diversity in where residents regularly turn for their information. Not only have entirely new channels arisen to become mainstream and nearly ubiquitous (e.g., social media), within these channels there exists a proliferation of alternative services. To add to the challenge, resident preferences for information sources are also dynamic, subject to change as new services are made available while others may fade in popularity, making thorough, effective communication a moving target for public agencies.

> Despite 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, with 2023's 84% placing in the upper end of the range. 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 City newsletters, the City's website, and email—is undoubtedly one of the reasons for this stability in satisfaction over the past nine years (see Communication on page 28).

> 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 2023 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 (91% of) residents in 2023 shared favorable opinions of the quality of life in San Carlos, with 39% reporting it is excellent and 52% stating it is good. Eight percent (8%) of residents indicated the quality of life in the City is fair, whereas just 1% used poor or very poor to describe the quality of life in the City. Quality of life ratings have remained steady since 2020, with no statistically significant changes across response categories.

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 respondents' household financial situation over the past two years. Across all subgroups, San Carlos residents shared positive assessments of the quality of life in the City, with ratings ranging from a low of 86% to a high of 95%.

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

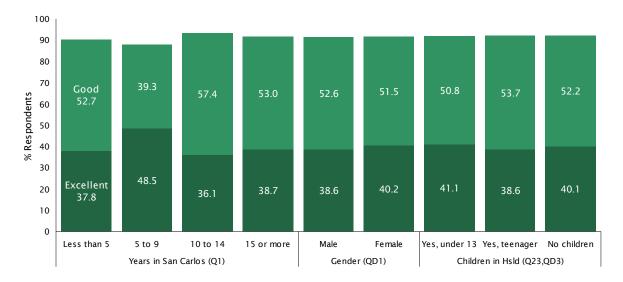
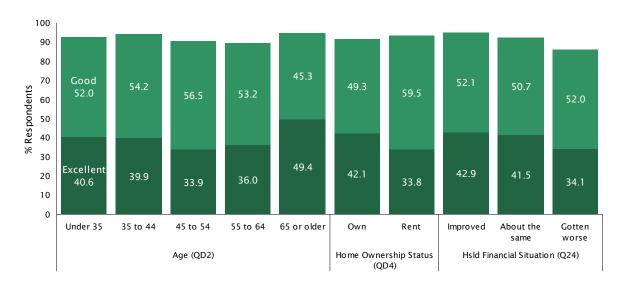


FIGURE 3 QUALITY OF LIFE BY AGE, HOME OWNERSHIP STATUS & HSLD FINANCIAL SITUATION



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.

Overall, 13% of respondents were either unsure of a change that would make San Carlos a better place to live (7%) or indicated they desired no changes from the City (6%). Among specific changes mentioned, the most common were limiting growth and development (15%), improving and maintaining infrastructure (10%), providing affordable housing (9%), reducing traffic congestion (8%), and adding and improving sidewalks and bike lanes (7%).

**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

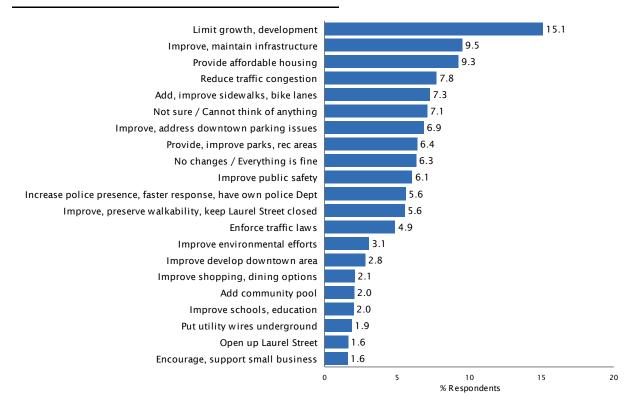


Table 1 presents the top five responses to this question by study year. Limiting growth and development has remained the most suggested improvement since 2016, and reducing traffic congestion has also been a top five mention each year. Providing affordable housing also remained a top response since 2020. For the first time, not sure/cannot think of anything was not a top-five response, meaning respondents were more apt to suggest an improvement in 2023. New to the top five this year were improving and maintaining infrastructure and adding and improving sidewalks and bike lanes. Improving and addressing parking issues, which had been in the top five since 2014, dropped to seventh place in 2023.

TABLE 1 TOP CHANGES TO IMPROVE SAN CARLOS BY STUDY YEAR

		Study	Year Year		
2023	2021	2020	2018	2016	2014
Limit growth, development			Limit growth, development	Improve, address parking issues	
Improve, maintain infrastructure	n Reduce traffic Reduce traffic Improve, address congestion congestion parking issues		Reduce traffic congestion	Reduce traffic congestion	
Provide affordable housing	Not sure / Cannot think of anything	Improve, address parking issues	Reduce traffic congestion	Improve, address parking issues	No changes needed
Reduce traffic congestion	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
Add, improve sidewalks, bike lanes	Provide affordable housing	Not sure / Can't think of anything	Improve, maintain infrastructure	Improve public safety	Improve schools, education

#### CITY SERVICES

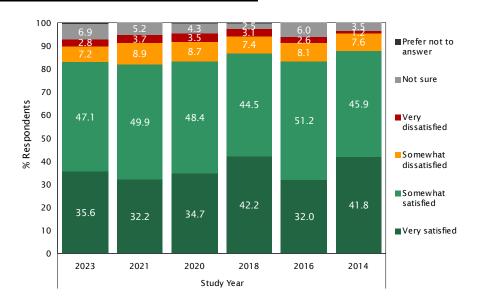
After measuring respondents' perceptions of the quality of life in San Carlos, the survey next turned to assessing opinions about the City's performance in providing municipal services.

**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, 83% of San Carlos residents indicated they were either very satisfied (36%) or somewhat satisfied (47%) with the City's efforts to provide municipal services. Approximately 10% of respondents indicated that they were dissatisfied with the City's overall performance, and an additional 7% indicated that they were unsure or unwilling to share their opinion. There were no statistically significant changes between the 2021 and 2023 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*. Approximately 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

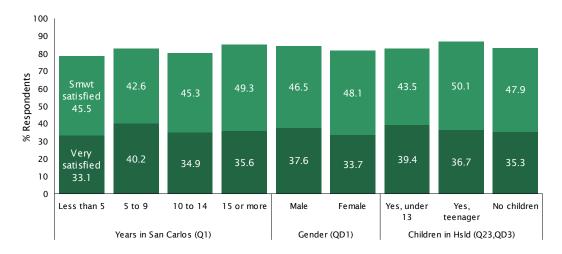
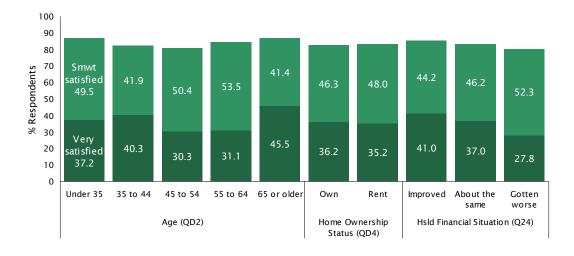


FIGURE 7 OVERALL SATISFACTION BY AGE, HOME OWNERSHIP STATUS & HSLD FINANCIAL SITUATION



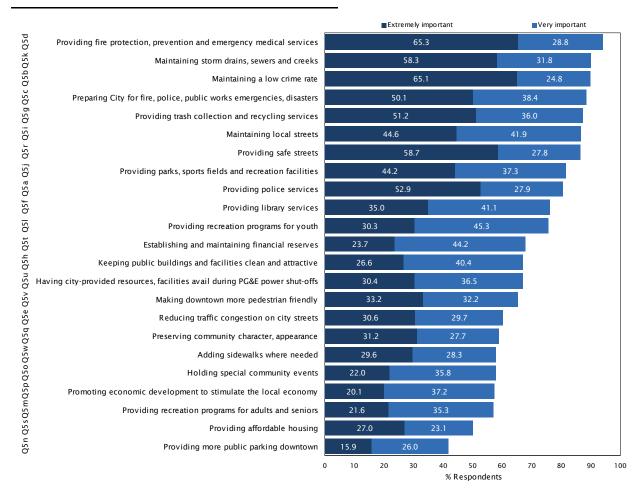
**SPECIFIC SERVICES** Whereas Question 4 addressed the City's *overall* performance, the next two questions asked respondents to rate the importance of *specific* services offered by the City, as well as their level of satisfaction with efforts to provide these services. For each service, respondents 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 (94% extremely or very important), maintaining storm drains, sewers, and creeks (90%), maintaining a low crime rate (90%), preparing the City for fire, police, and public works emergencies and disasters (89%), providing trash collection and recycling services (87%), maintaining

local streets (87%), and providing safe streets (87%) received the highest importance ratings from residents. At the other end of the spectrum, providing more public parking downtown (42%) and providing affordable housing (50%) 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 2023, as well as the difference from 2021 to 2023. Over the past two years, three services exhibited statistically significant *increases* in importance (having city resources and facilities available during PG&E power shutoffs, holding special community events, and providing recreation programs for youth) while five others were rated as significantly less important (reducing traffic congestion on city streets, providing more public parking downtown, preserving community character and appearance, promoting economic development, and providing police services).

TABLE 2 IMPORTANCE OF SERVICES BY STUDY YEAR<sup>2</sup>

	2023	Study Year					Change in Extremely + Very Important 2021 to 2023
Having city-provided resources, facilities avail during PG&E power shut-offs	67.0	2021 58.7	2020 N/A	2018 N/A	2016 N/A	2014 N/A	+8.3†
Holding special community events	57.8	52.2	47.6	51.0	56.8	58.3	+5.6†
Providing recreation programs for youth	75.6	70.3	65.2	70.0	68.8	68.6	+5.3†
Providing recreation programs for adults and seniors	56.9	52.7	51.9	49.7	54.6	N/A	+4.2
Maintaining storm drains, sewers and creeks	90.1	86.9	87.6	92.4	89.5	91.5	+3.2
Providing library services	76.1	73.9	73.9	75.1	77.0	73.6	+2.1
Providing affordable housing	50.1	49.9	47.0	N/A	N/A	N/A	+0.2
Providing parks, sports fields and recreation facilities	81.5	82.5	77.5	79.9	82.9	78.8	-1.0
Providing fire protection, prevention and emergency medical services	94.0	95.9	95.0	92.6	94.9	96.8	-1.8
Maintaining local streets	86.6	89.2	89.4	88.9	91.2	93.6	-2.6
Establishing and maintaining financial reserves	67.9	70.6	67.5	N/A	N/A	N/A	-2.7
Preparing City for fire, police, public works emergencies, disasters	88.5	91.6	88.6	86.0	85.7	84.6	-3.1
Providing safe streets	86.5	89.7	95.5	N/A	N/A	N/A	-3.2
Maintaining a low crime rate	89.9	93.2	93.6	93.1	96.0	95.5	-3.4
Providing trash collection and recycling services	87.2	90.6	90.0	90.5	90.6	89.7	-3.4
Keeping public buildings and facilities clean and attractive	67.0	70.8	71.8	70.3	74.5	76.6	-3.8
Providing police services	80.7	84.8	88.2	91.1	91.5	93.2	-4.0†
Promoting economic development to stimulate the local economy	57.3	62.4	48.3	52.1	59.5	68.5	-5.1†
Preserving community character, appearance	58.9	64.2	67.7	64.5	72.3	66.0	-5.3†
Providing more public parking downtown	41.9	49.0	58.2	63.4	N/A	N/A	-7.1 †
Reducing traffic congestion on city streets	60.3	69.6	77.3	79.5	N/A	N/A	-9.2†
Making downtown more pedestrian friendly	65.4	N/A	N/A	N/A	N/A	N/A	N/A
Adding sidewalks where needed	57.9	N/A	N/A	N/A	N/A	N/A	N/A

<sup>†</sup> Statistically significant change (p < 0.05) between the 2021 and 2023 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 (97% very or somewhat satisfied), followed by provide trash collection and recycling services (95%), keep public buildings and facilities clean and attractive (94%), hold special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk, and others (94%), and provide recreation programs for youth (94%). Respondents were comparatively less satisfied with the City's efforts to provide affordable housing (51%).

<sup>2.</sup> Preparing the City for fire, police, and public works emergencies and disasters was previously worded as Preparing the City for fire, police, and public works emergencies (2020 to 2021) and Preparing the City for emergencies (2014 to 2018).

**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

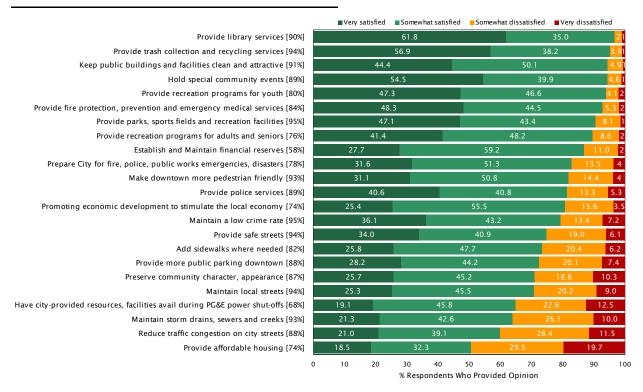


Table 3 on the next page displays the percentage of respondents who were satisfied with each service from 2014 to 2023, as well as the difference in satisfaction between the 2021 and 2023 studies. As shown in the right column, most services experienced small and statistically insignificant changes in satisfaction over the past two years. Respondents expressed statistically significant *increases* in satisfaction with the City's efforts to reduce traffic congestion on city streets (+7%) and provide more public parking downtown (+6%) between 2021 and 2023, whereas satisfaction with the City's efforts to maintain storm drains, sewers, and creeks (-25%) and maintain a low crime rate (-5%) declined during the same period.

TABLE 3 SATISFACTION WITH SERVICES BY STUDY YEAR

	Study Year					Change in Satisfaction	
	2023	2021	2020	2018	2016	2014	2021 to 2023
Reduce traffic congestion on city streets	60.0	53.3	38.1	41.0	N/A	N/A	+6.8†
Provide more public parking downtown	72.5	66.6	59.8	44.6	N/A	N/A	+5.9†
Promoting economic development to stimulate the local economy	80.9	76.5	79.3	82.2	81.3	82.3	+4.4
Hold special community events	94.4	91.3	95.7	96.5	96.3	95.4	+3.1
Provide recreation programs for youth	93.9	91.2	93.9	94.7	96.2	95.8	+2.7
Maintain local streets	70.8	68.3	70.0	74.2	71.6	78.3	+2.5
Provide affordable housing	50.7	48.3	45.0	N/A	N/A	N/A	+2.5
Establish and Maintain financial reserves	86.9	84.5	86.7	N/A	N/A	N/A	+2.4
Provide library services	96.8	95.1	96.3	97.5	97.8	96.7	+1.6
Preserve community character, appearance	70.9	69.5	69.5	74.9	76.4	82.6	+1.4
Provide trash collection and recycling services	95.1	93.7	94.9	95.2	94.7	90.5	+1.4
Keep public buildings and facilities clean and attractive	94.5	93.5	92.8	95.7	93.2	98.5	+1.1
Provide parks, sports fields and recreation facilities	90.6	89.7	89.9	90.9	88.1	87.9	+0.9
Provide police services	81.4	80.6	84.3	89.4	83.4	91.1	+0.8
Provide fire protection, prevention and emergency medical services	92.8	92.9	94.2	95.8	95.9	96.4	-0.0
Provide safe streets	74.9	75.9	81.3	N/A	N/A	N/A	-1.1
Provide recreation programs for adults and seniors	89.6	91.9	91.3	94.3	90.8	N/A	-2.3
Prepare City for fire, police, public works emergencies, disasters	82.9	85.3	87.5	88.6	87.9	91.0	-2.4
Have city-provided resources, facilities avail during PG&E power shut-offs	64.9	68.3	N/A	N/A	N/A	N/A	-3.3
Maintain a low crime rate	79.4	84.2	85.9	90.8	76.6	86.6	-4.8†
Maintain storm drains, sewers and creeks	63.9	89.0	88.0	89.3	87.3	89.2	-25.1†
Make downtown more pedestrian friendly	81.8	N/A	N/A	N/A	N/A	N/A	N/A
Add sidewalks where needed	73.4	N/A	N/A	N/A	N/A	N/A	N/A

<sup>†</sup> Statistically significant change (p < 0.05) between the 2021 and 2023 studies.

DIFFERENTIATORS OF OPINION For the interested reader, Table 4 on the next page 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 11). 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 22 of the 23 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 provide safe streets, maintain local streets, preserve community character and appearance through building and planning permits, inspections, and code enforcement, and maintain a low crime rate.

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 library services, hold special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk, and others, provide trash collection and recycling services, and keep public buildings and facilities clean and attractive.

Satisfaction with the City's efforts to provide affordable housing was the only service to receive a higher rating among respondents *dissatisfied* with the City's performance overall as compared to those satisfied.

TABLE 4 SATISFACTION WITH SERVICES BY OVERALL SATISFACTION

			erformance (Q4)	Difference Between
		Very or somewhat		Groups For Each
		satisfied	dissatisfied	Service
	Provide safe streets	80.7	40.8	39.9
	Maintain local streets	74.8	39.8	34.9
a)	Preserve community character, appearance	75.4	40.7	34.7
یّ	Maintain a low crime rate	83.7	49.6	34.1
Service	Prepare City for fire, police, public works emergencies, disasters	86.6	56.2	30.4
	Maintain storm drains, sewers and creeks	68.1	38.0	30.1
Each	Provide police services	84.6	59.1	25.5
Ea	Reduce traffic congestion on city streets	63.3	40.9	22.5
With	Have city-provided resources, facilities avail during PG&E power shut-offs	67.2	46.6	20.6
≶	Add sidewalks where needed	76.8	56.9	19.9
g	Make downtown more pedestrian friendly	84.2	66.2	18.0
θį	Establish and Maintain financial reserves	90.8	73.5	17.2
Satisfied	Provide parks, sports fields and recreation facilities	92.3	77.1	15.2
S	Provide more public parking downtown	73.9	58.8	15.1
ıts	Provide fire protection, prevention and emergency medical services	94.4	81.1	13.4
<u>e</u>	Provide recreation programs for youth	95.7	82.5	13.3
ü	Provide recreation programs for adults and seniors	91.3	79.5	11.8
bo	Promoting economic development to stimulate the local economy	83.1	72.2	10.8
Respondents	Keep public buildings and facilities clean and attractive	96.1	87.3	8.7
% R	Provide trash collection and recycling services	96.4	87.8	8.6
01	Hold special community events	96.2	90.6	5.6
	Provide library services	97.0	92.3	4.7
	Provide affordable housing	50.0	68.2	-181

#### NEEDS & PRIORITIES PERFORMANCE

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. 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. The City is moderately meeting a respondent's needs if the respondent Moderately is satisfied and the level of satisfaction is commensurate with the level of

importance assigned to the service.

The City is marginally meeting a respondent's needs if the respondent is Meeting Needs, Marginally 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.

The City is marginally not meeting a respondent's needs if the respon-Not Meeting Needs, Marginally dent is somewhat dissatisfied, but the service is also viewed as just

somewhat or not at all important.

Not Meeting Needs, The City is moderately *not* meeting a respondent's needs if A) a respon-Moderately dent 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 respon-

dent is somewhat dissatisfied and the service is very important.

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

tant.

Severely

<sup>3.</sup> 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

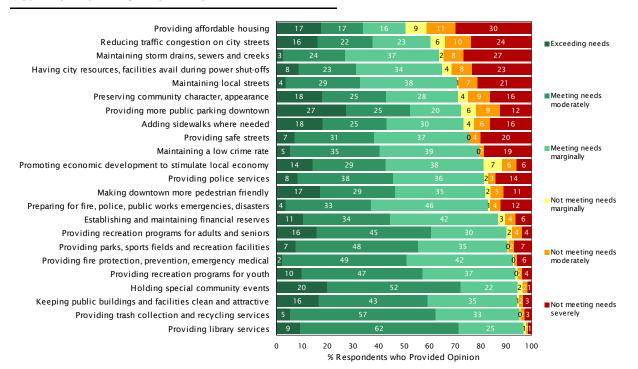
			Impoi	rtance	
		Not at all important	Somewhat important	Very important	Extremely important
-		important	Πηροιταπτ	very important	πηροιταπτ
	Very satisfied	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
ıction	Somewhat satisfied	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, marginally
Satisfaction	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 23 services tested in the study. Thus, for example, a respondent who indicated that providing affordable housing 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., reducing traffic congestion on city streets) 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 23 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 providing affordable housing, the City is exceeding the needs of 17% of respondents, moderately meeting the needs of 17% of respondents, marginally meeting the needs of 16% of respondents, marginally not meeting the needs of 9% of respondents, moderately not meeting the needs of 11% of respondents, and severely not meeting the needs of 30% of respondents.

As shown in the figure, the City is meeting the needs of at least three-quarters of residents for 15 of the 23 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, maintaining storm drains, sewers, and creeks, and having city-provided resources and facilities available to residents during PG&E power shut-offs.

#### FIGURE 10 RESIDENT SERVICE NEEDS



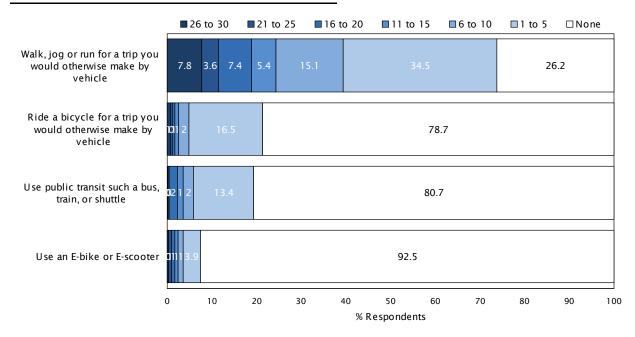
#### ALTERNATIVE TRANSPORTATION

New to the 2023 study, the next section of the report presents the findings of two questions designed to assess how frequently residents use alternative transportation methods when traveling in San Carlos, and how safe residents feel while engaged in alternative or active transportation.

FREQUENCY OF USE In a typical month, 74% of San Carlos residents walk, jog, or run for a trip they would otherwise make by vehicle, with 19% doing so the majority of days in the month. As shown in Figure 11, the frequency of using alternative modes of travel was much lower for each of the other three methods tested. Approximately two-in-ten residents indicated that they ride a bicycle for a trip they would otherwise make by vehicle (21%) or use public transit such as a bus, train, or shuttle (19%) at least once per month, whereas 8% use an e-bike or e-scooter when traveling in San Carlos on a monthly basis.

Question 7 In a typical month, how many days do you:\_\_\_\_\_ when traveling in San Carlos?

FIGURE 11 DAYS IN TYPICAL MONTH USE ALTERNATIVE TRANSPORTATION IN SAN CARLOS



The tables on the next page show how using each alternative transportation method at least once per month when traveling in San Carlos varied by demographic subgroups. Walking, jogging, or running for a trip that would have otherwise been made by vehicle was highest among respondents who have lived in San Carlos less than 15 years, those under 65 years of age, and those with a child in the home. Riding a bicycle for a trip that would have otherwise been made by vehicle was highest among residents 35 to 64 years of age and those with a child in the home. Using public transit was reported most frequently by residents under 35 years of age and renters, while e-bike and e-scooter use was most prevalent among residents under 35 years of age.

TABLE 6 DAYS IN TYPICAL MONTH USE ALTERNATIVE TRANSPORTATION IN SAN CARLOS BY YEARS IN SAN CARLOS (SHOWING % AT LEAST ONCE PER MONTH)

	Years in San Carlos (Q1)						
	Less than 5	5 to 9	10 to 14	15 or more			
Walk, jog or run for a trip you would otherwise make by vehicle	84.7	83.9	80.6	67.1			
Ride a bicycle for a trip you would otherwise make by vehicle	21.2	25.1	28.3	19.1			
Use public transit such a bus, train, or shuttle	23.6	21.6	28.5	15.5			
Use an E-bike or E-scooter	10.5	3.0	9.5	6.9			

TABLE 7 DAYS IN TYPICAL MONTH USE ALTERNATIVE TRANSPORTATION IN SAN CARLOS BY AGE (SHOWING % AT LEAST ONCE PER MONTH)

			Age (QD2)		
	Under 35	35 to 44	45 to 54	55 to 64	65 or older
Walk, jog or run for a trip you would otherwise make by vehicle	74.8	83.9	80.6	74.4	56.5
Ride a bicycle for a trip you would otherwise make by vehicle	15.7	29.6	27.2	26.3	9.4
Use public transit such a bus, train, or shuttle	35.8	16.5	19.1	16.7	10.7
Use an E-bike or E-scooter	17.7	3.7	7.2	8.3	2.3

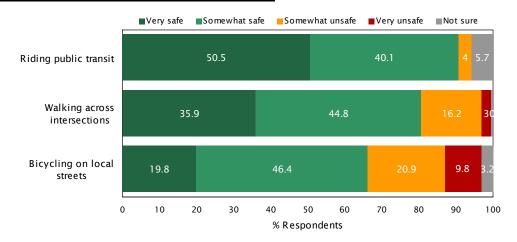
TABLE 8 DAYS IN TYPICAL MONTH USE ALTERNATIVE TRANSPORTATION IN SAN CARLOS BY CHILDREN IN HSLD & HOME OWNERSHIP STATUS (SHOWING % AT LEAST ONCE PER MONTH)

	Child	ren in Hsld (Q23,	Home Ownership Status (QD4)		
	Yes, under 13	Yes, teenager	No children	Own	Rent
Walk, jog or run for a trip you would otherwise make by vehicle	83.8	84.6	68.5	73.5	79.2
Ride a bicycle for a trip you would otherwise make by vehicle	31.5	29.3	16.1	21.0	22.3
Use public transit such a bus, train, or shuttle	12.3	25.4	20.5	14.3	29.1
Use an E-bike or E-scooter	8.5	10.9	6.9	6.5	8.8

SAFETY All San Carlos residents were next asked how safe they feel walking across intersections, and those who indicated that they utilize public transit or ride a bicycle or e-bike (Question 7) were asked how safe they feel engaging in each activity. As shown in Figure 12, the vast majority of residents feel safe in each scenario, with 91% of transit users indicating they feel very (51%) or somewhat (40%) safe riding public transit, 81% of all residents stating they feel very (36%) or somewhat (45%) safe walking across intersections, and 66% of cyclists and e-bike riders saying they feel very (20%) or somewhat safe (46%) bicycling on local streets.

**Question 8** When you are: \_\_\_\_ in San Carlos, would you say that you feel very safe, somewhat safe, somewhat unsafe, or very unsafe?

FIGURE 12 SAFETY



# 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 13, 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, 80% of residents said that they trust the City of San Carlos and agreed that the City manages its finances well, 70% felt the City is responsive to residents' needs, and 63% agreed that the City listens to residents when making important decisions. Table 9 on the next page provides the percentage of respondents who agreed with each of the statements from 2014 to 2023, among those who provided an opinion. There were no statistically significant changes between the 2021 and 2023 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 13 AGREEMENT WITH STATEMENTS ABOUT SAN CARLOS

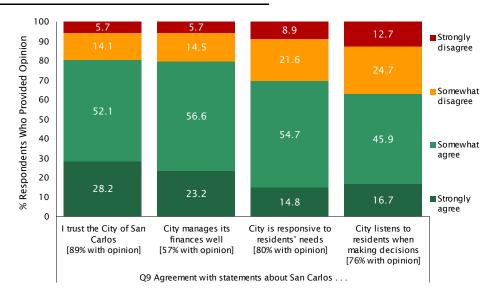


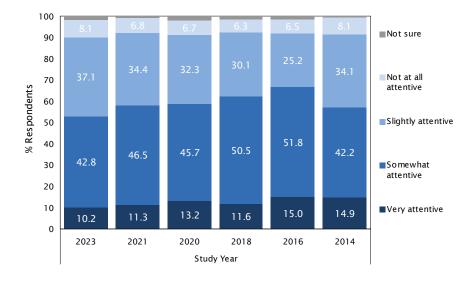
TABLE 9 AGREEMENT WITH STATEMENTS ABOUT CITY BY STUDY YEAR

		Change in Agreement					
	2023	2021	2020	2018	2016	2014	2021 to 2023
I trust the City of San Carlos	80.3	77.7	77.4	77.2	75.8	84.4	+2.6
The City is responsive to residents' needs	69.5	67.6	67.9	69.2	69.2	67.8	+1.9
The City manages its finances well	79.8	78.6	79.7	76.0	68.6	76.2	+1.1
The City listens to residents when making important decisions	62.6	61.6	60.8	64.2	61.2	71.5	+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, 10% of respondents in 2023 said they are very attentive to matters of local government, 43% somewhat attentive, and 37% slightly attentive. An additional 8% of respondents confided that they do not pay any attention to the activities of the City of San Carlos and 2% were unsure. There were no statistically significant changes from 2021 to 2023 (see Figure 14).

**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 14 ATTENTIVENESS TO CITY GOVERNMENT BY STUDY YEAR



Figures 15 and 16 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, 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 15 ATTENTIVENESS TO CITY GOVERNMENT BY YEARS IN SAN CARLOS & AGE

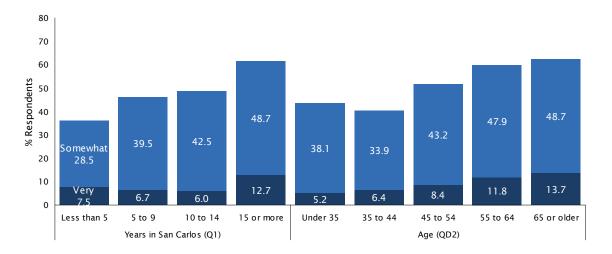
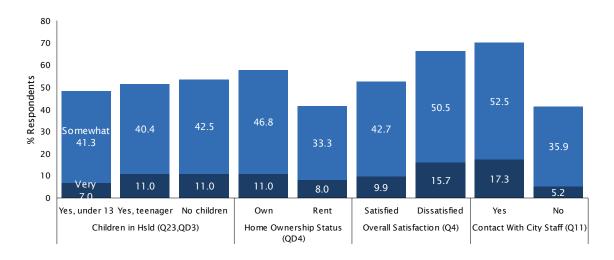


FIGURE 16 ATTENTIVENESS TO CITY GOVERNMENT BY CHILDREN IN HSLD, HOME OWNERSHIP STATUS, OVERALL SATISFACTION & CONTACT WITH CITY STAFF



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 17 on the next page, 39% of respondents indicated they had been in contact with staff during this period, which is statistically consistent with the percentage recorded in 2021.

When compared with their respective counterparts, those at least 35 years of age and home owners were the most likely to report having contact with city staff in the past year (see Figure 18 on the next page).

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

FIGURE 17 CONTACT WITH CITY IN PAST 12 MONTHS BY STUDY YEAR

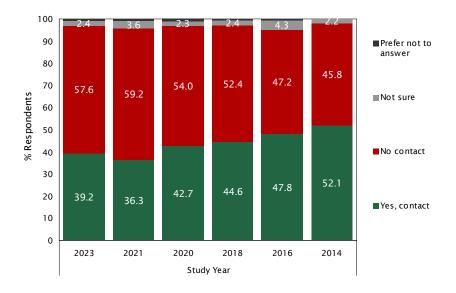
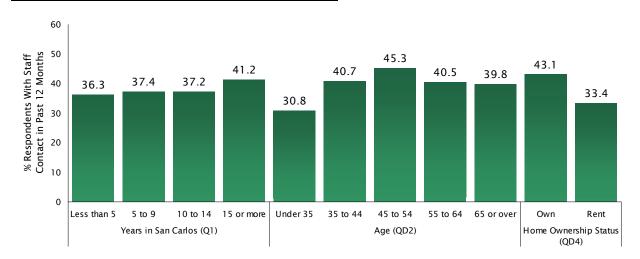


FIGURE 18 CONTACT WITH CITY IN PAST 12 MONTHS BY YEARS IN SAN CARLOS, AGE & HOME OWNERSHIP STATUS



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 19 on the next page, San Carlos residents rated city staff high on all three dimensions tested, with approximately nine-in-ten rating staff as very or somewhat professional (94%), accessible (91%), and helpful (86%). As shown in Table 10 on the next page, there were no statistically significant changes from the 2021 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 19 OPINION OF CITY STAFF

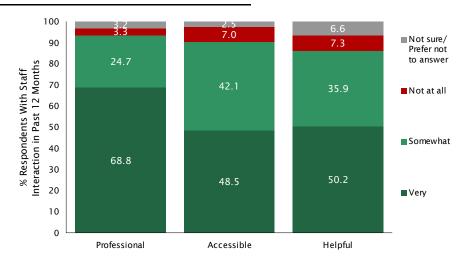


TABLE 10 OPINION OF CITY STAFF BY STUDY YEAR (SHOWING % VERY AMONG THOSE WITH OPINION)

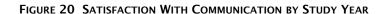
		Change in % Very					
	2023	2021	2020	2018	2016	2014	2021 to 2023
Helpful	53.8	46.5	46.4	46.6	47.4	47.1	+7.3
Professional	71.1	65.6	67.8	66.5	65.9	69.6	+5.5
Accessible	49.7	47.0	47.9	47.4	54.4	50.2	+2.7

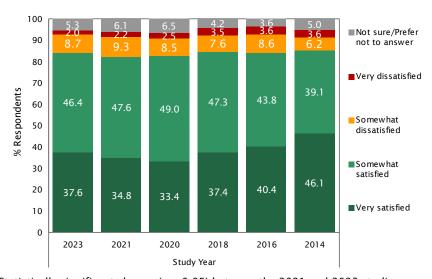
#### COMMUNICATION

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, 84% of respondents indicated they were satisfied with the City's efforts to communicate with residents through electronic and print newsletters, social media, email, the City's website, and other means. The remaining respondents were either dissatisfied with the City's efforts in this respect (11%) or unsure of their opinion (5%). Despite a slight wording change in 2023<sup>4</sup>, the results for this question were consistent with those recorded in 2021—there were no statistically significant changes (see Figure 20).

Question 13 Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through electronic and print newsletters, social media, email, the City's website, and other means?





 $\dagger$  Statistically significant change (p < 0.05) between the 2021 and 2023 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

<sup>4.</sup> Prior to 2023, the question asked about satisfaction with the City's efforts to communicate with residents through newsletters, the Internet, television, and other means.

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 lower satisfaction with the City's communication efforts.

FIGURE 21 SATISFACTION WITH COMMUNICATION BY YEARS IN SAN CARLOS, GENDER & CHILDREN IN HSLD

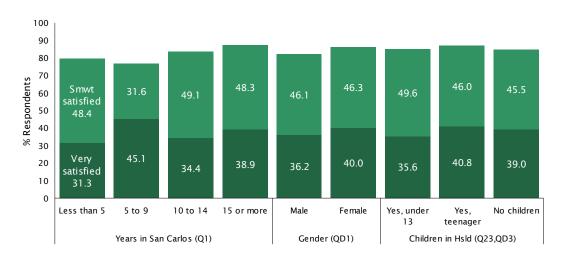
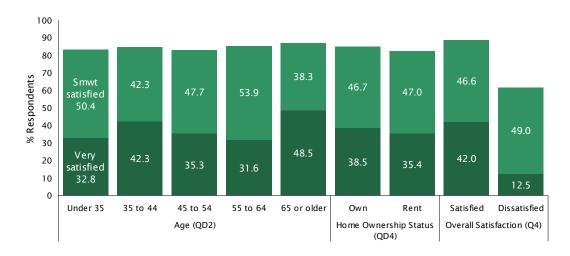


FIGURE 22 SATISFACTION WITH COMMUNICATION BY AGE, HOME OWNERSHIP STATUS & OVERALL SATISFACTION



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 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 23 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 that are mailed to the home, mentioned by 55% of respondents. City newsletters sent via email accounted for an additional 14%, resulting in 62% of total respondents citing a city newsletter (after accounting for

overlap among respondents who mentioned both). The City's newsletters were followed by post-cards, letters, flyers, or brochures mailed to the home (25%), the City's website (23%), email notifications from the City (18%), and Nextdoor (16%). For the interested reader, Table 11 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 23 CITY INFORMATION SOURCES

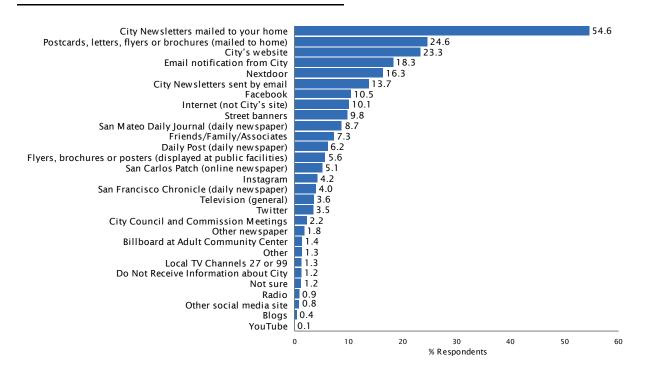


TABLE 11 TOP CITY INFORMATION SOURCES BY STUDY YEAR<sup>5</sup>

Study Year									
2023	2021	2020 2018		2016	2014				
City Newsletters mailed to your home	City Newsletters	City Newsletters	City Newsletters	City Newsletters	City Newsletters				
Postcards, letters, flyers or brochures (mailed to home)	Nextdoor	Nextdoor	City's website	Postcards, letters, flyers or brochures (mailed to home)	City's website				
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	Email notification from City	City's website	Postcards, letters, flyers or brochures (mailed to home)	Nextdoor	Email notification from City				
Nextdoor	Postcards, letters, flyers or brochures (mailed to home)	Email notification from City	Email notification from City	City's website	San Carlos Patch				

<sup>5.</sup> In 2023, city newsletters were delineated as mailed to your home or sent by email.

For the interested reader, figures 24 and 25 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 24 INFORMATION SOURCE CATEGORIES BY OVERALL & AGE

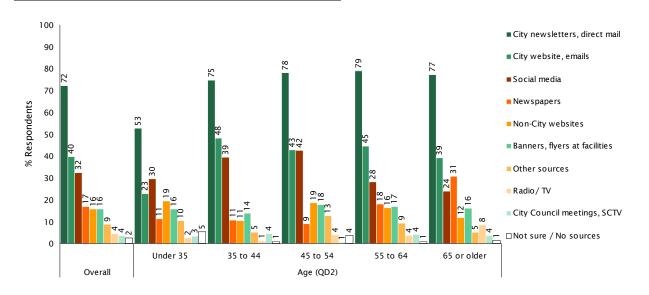
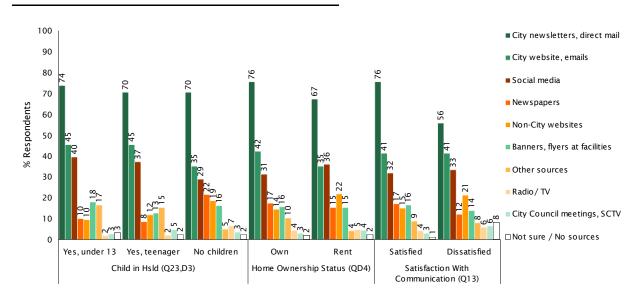


FIGURE 25 INFORMATION SOURCE CATEGORIES BY CHILDREN IN HSLD, HOME OWNERSHIP STATUS & SATISFACTION WITH COMMUNICATION



COMMUNICATION PREFERENCES The next communication-related question presented residents with the methods shown to the left of Figure 26 on the next page and asked whether each would be an effective way for the City to communicate with them. Overall, respondents indicated that newsletters mailed to the home was the most effective method (87% very or somewhat effective), followed by email (84%), newsletters sent by email (78%), the City's website (69%), and text messages (67%).

**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 26 EFFECTIVENESS OF COMMUNICATION EFFORTS

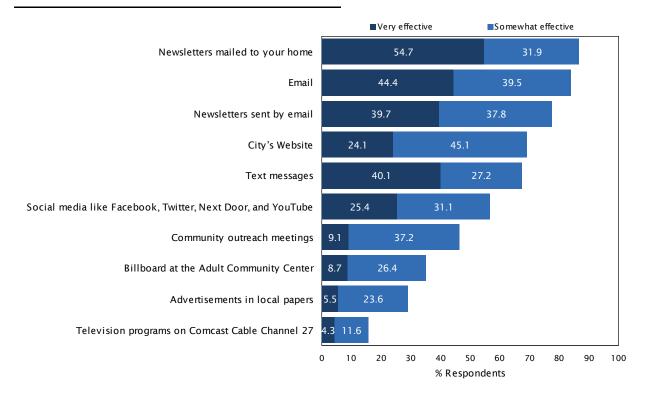


Table 12 shows how the percentage of residents that rated each communication method as *very effective* varied depending on their satisfaction with the City's overall efforts to provide municipal services and their age, with the top three methods within each subgroup highlighted in green to ease comparisons. It is noteworthy that every age group cited newsletters mailed to the home as one of the top ways for the City to communicate with them. While email was in the top three for those 35 years and older, text messages were favored over email by a factor of 2 to 1 among the youngest age cohort (under 35 years).

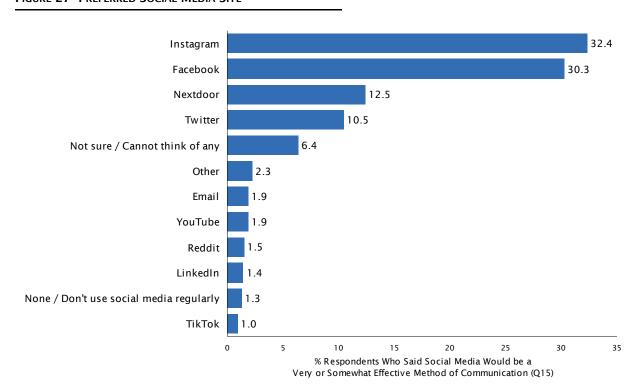
TABLE 12 EFFECTIVENESS OF COMMUNICATION METHODS BY OVERALL SATISFACTION & AGE (SHOWING % VERY EFFECTIVE)

	Overall Sati	sfaction (Q4)	Age (QD2)				
	Satisfied	Dissatisfied	Under 35	35 to 44	45 to 54	55 to 64	65 or older
Newsletters mailed to your home	57.9	34.4	55.1	60.5	45.8	52.2	63.1
Email	45.1	44.8	25.9	59.0	49.1	44.3	49.0
Text messages	40.8	42.5	54.2	42.2	40.2	33.5	32.9
Newsletters sent by email	40.5	36.9	24.8	48.7	35.4	45.3	48.8
Social media like Facebook, Twitter, Next Door, and YouTube	26.1	22.5	29.0	38.2	30.8	19.7	12.4
City's Website	26.4	13.2	32.5	28.2	18.3	20.9	22.9
Community outreach meetings	9.0	7.7	9.4	5.7	9.3	11.6	11.1
Billboard at the Adult Community Center	9.7	4.5	14.9	6.1	3.4	7.5	12.2
Advertisements in local papers	5.8	0.9	2.8	2.7	2.6	7.2	11.4
Television programs on Comcast Cable Channel 27	4.3	3.3	1.8	5.4	3.0	5.9	4.7

PREFERRED SOCIAL MEDIA SITE New to the 2023 survey, the final question in this section asked respondents who indicated that social media was at least a somewhat effective method for the City to communicate with them to identify the social media site that they use most often. As shown in Figure 27, Instagram (32%) and Facebook (30%) were the most widely favored, followed by Nextdoor (13%) and Twitter (11%).

**Question 16** What is your preferred Social Media site - the one you currently use most often?

FIGURE 27 PREFERRED SOCIAL MEDIA SITE



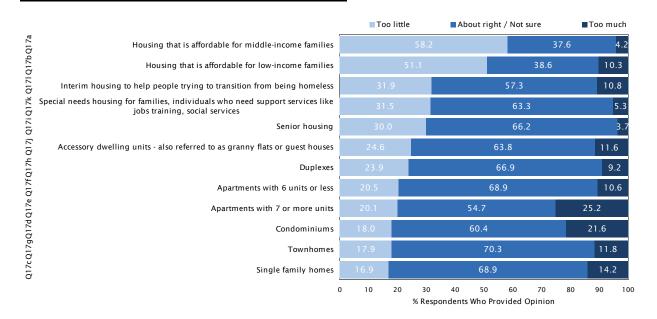
## DEVELOPMENT & HOUSING

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 2023 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 17 presented respondents with the list of housing types shown on the left of Figure 28 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 17 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 28 OPINION OF HOUSING DEVELOPMENT TYPES IN CITY



Overall, residents were much more likely to cite a deficiency in housing that is *programmed* for specific groups than they were the physical structure of housing that could accommodate these needs. More than half of respondents felt there was too little housing that is affordable for middle-income families (58%) and low-income families (51%). Although the dominant answer for the remaining housing types tested was *about right/not sure*, the percentage who felt there was not enough interim housing to help people trying to transition from being homeless (32%), special needs housing for families and individuals who need support services like job training and social services (32%), and senior housing (30%) was higher than the percentage who felt there was

already too much of each type of housing in San Carlos by a factor of at least 3 to 1. At the other end of the spectrum, fewer than two-in-ten respondents felt there is currently not enough supply of single family homes (17%), townhomes (18%), and condominiums (18%) in San Carlos.

From 2021 to 2023 (see Table 13), a significantly higher percentage of respondents felt there are currently not enough apartments with seven or more units (+8%) and condominiums (+6%) in San Carlos, whereas significantly fewer thought there are not enough accessory dwelling units (-7%).

TABLE 13 OPINION OF HOUSING DEVELOPMENT TYPES IN CITY BY STUDY YEAR

	Study	y Year	Change in
			% Too Little
	2023	2021	2021 to 2023
Apartments with 7 or more units	20.1	12.2	+7.9†
Condominiums	18.0	11.9	+6.1†
Housing that is affordable for middle-income families	58.2	54.2	+4.1
Senior housing	30.0	26.0	+4.1
Single family homes	16.9	13.4	+3.5
Housing that is affordable for low-income families	51.1	47.9	+3.3
Apartments with 6 units or less	20.5	17.7	+2.8
Special needs housing for families, individuals who need support services like jobs training, social services	31.5	29.3	+2.1
Townhomes	17.9	16.7	+1.2
Interim housing to help people trying to transition from being homeless	31.9	31.5	+0.4
Accessory dwelling units - also referred to as granny flats or guest houses	24.6	31.7	-7.1†
Duplexes	23.9	N/A	N/A

<sup>†</sup> Statistically significant change (p < 0.05) between the 2021 and 2023 studies.

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 29 on the next page shows that 39% of those surveyed in 2023 viewed the pace of development as too fast, a statistically significant decrease from the 2021 survey results that continues the decline from the peak of 55% recorded in 2020. Approximately four-in-ten (41%) thought the pace of development has been about right during the past three years (significantly higher than 2021), whereas 12% felt that the City has grown too slowly (also higher than 2021) and an additional 8% of respondents were unsure or unwilling to share their opinion on this matter.

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. As length of residence increased, so did the percentage who felt the pace of development in the past three years has been *too fast*. For age, there is a marked difference in opinions between those under 45 years of age and those 45 and older (see Figure 30 on next page). Additionally, 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* (61% vs. 36%).

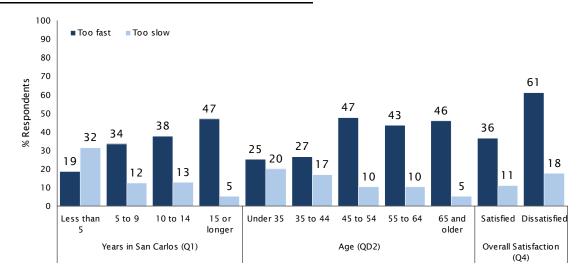
**Question 18** In the past three years, would you say the pace of development in San Carlos has been too fast, about right, or too slow?

FIGURE 29 PACE OF DEVELOPMENT BY STUDY YEAR



 $\dagger$  Statistically significant change (p < 0.05) between the 2021 and 2023 studies.

FIGURE 30 PACE OF DEVELOPMENT BY YEARS IN SAN CARLOS, AGE & OVERALL SATISFACTION



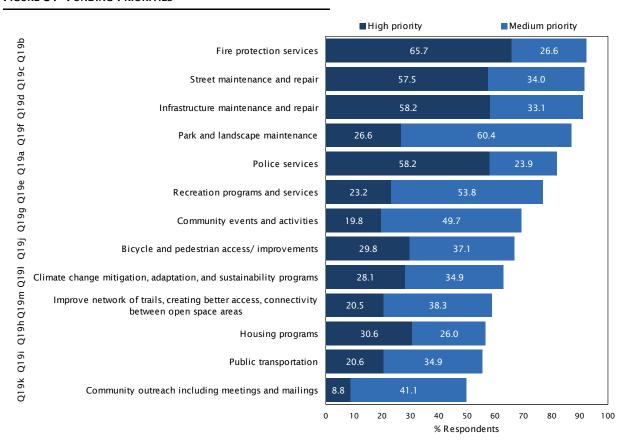
## FUNDING PRIORITIES

It is often the case that residents' desires for public programs and services exceed a city's financial resources. In such cases, a city must prioritize projects based upon a variety of factors, including the preferences and needs of residents. The questions presented in this section of the report were designed to provide San Carlos with a reliable measure of how residents, as a whole, prioritize a variety of projects and programs to which the City could allocate additional funding.

The first question in this series (Question 19) 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 31 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 19 The City of San Carlos has the financial resources to provide some of the services, programs and projects desired by residents. However, because it can't fund every service, program and project, the City must set priorities. 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 31 FUNDING PRIORITIES



The 13 projects and programs are sorted in Figure 31 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 (92% high or medium priority), street maintenance and repair (92%), infrastructure maintenance and repair (91%), park and landscape maintenance (87%), and police services (82%) were the top five. The majority of all respondents rated each of the 13 projects as a high or medium priority for future spending.

For the interested reader, Table 14 provides the percentage of respondents who considered each project a *high priority* by their overall satisfaction with the City's performance and age (top three within each subgroup highlighted green).

TABLE 14 FUNDING PRIORITIES BY OVERALL SATISFACTION & AGE (SHOWING % HIGH PRIORITY)

	Overall Sat	isfaction (Q4)	Age (QD2)				
	Satisfied	Dissatisfied	Under 35	35 to 44	45 to 54	55 to 64	65 or over
Fire protection services	65.5	67.9	53.2	57.1	57.9	76.5	80.7
Infrastructure maintenance and repair	58.9	57.9	47.4	46.9	57.7	66.6	70.5
Police services	56.6	70.9	31.6	43.3	59.0	73.2	77.2
Street maintenance and repair	57.3	57.9	42.0	45.2	57.4	68.1	71.3
Housing programs	32.9	15.1	56.4	29.4	21.8	25.5	20.8
Bicycle and pedestrian access/ improvements	30.6	30.5	32.1	35.9	35.0	28.0	21.8
Climate change mitigation, adaptation, and sustainability programs	30.3	13.7	22.5	29.4	31.9	30.1	28.9
Park and landscape maintenance	24.1	35.9	15.9	29.0	26.2	32.4	30.2
Recreation programs and services	22.8	20.1	14.1	34.6	26.0	22.7	22.9
Public transportation	20.1	11.8	39.3	18.2	12.7	17.0	17.7
Improve network of trails, creating better access, connectivity btwn open space areas	20.0	22.9	29.1	17.0	18.6	19.2	18.8
Community events and activities	19.6	17.6	15.2	33.3	22.8	15.8	16.7
Community outreach including meetings and mailings	8.0	4.9	10.6	5.0	7.6	8.8	12.4

ADDITIONAL HIGH PRIORITIES? As a follow-up to Question 19, all residents were next asked whether there was another item or project not previously mentioned that they thought should be 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 32 on the next page.

The majority of residents (58%) did not have anything to add to the list of projects and services tested previously. Among the specific items that were mentioned, maintaining city infrastructure and sidewalks (5%) was the only one to be cited by at least 5% of residents. Providing more affordable housing (3%), limiting growth and maintaining open space (3%), and providing more recreation centers and facilities (3%) rounded out the top responses.

Table 15 on the next page shows how responses to this question have changed since first introduced in 2020. Providing more affordable housing and providing more recreation centers and facilities were top-five responses for the first time in 2023.

**Question 20** Is there another item or project not already mentioned that you think should be a high priority for the City to fund?

FIGURE 32 ADDITIONAL HIGH PRIORITY ITEMS

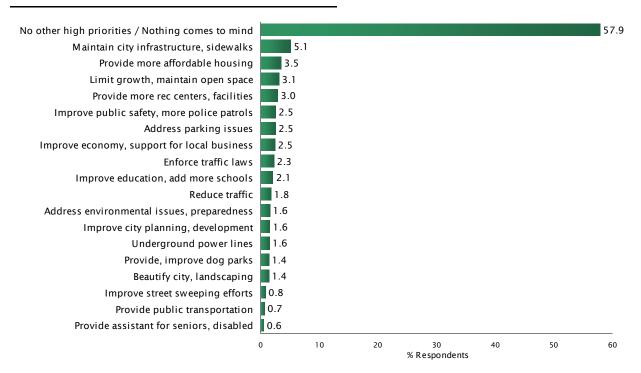


TABLE 15 ADDITIONAL HIGH PRIORITY ITEMS BY STUDY YEAR

2023	Study Year 2021	2020
No other high priorities / Nothing comes to mind	No other high priorities / None come to mind	No other high priorities / None come to mind
Maintain city infrastructure, sidewalks	Prefer not to answer	Limit growth, maintain open space
Provide more affordable housing	Address COVID-19 issues, concerns	Maintain city infrastructure
Limit growth, maintain open space	Reduce traffic	Reduce traffic
Provide more rec centers, facilities	Improve education, add more schools	Improve education, add more schools

AVAILABILITY OF RECREATIONAL AMENITIES New to the 2023 study, residents were presented with the ten recreational and community amenities shown to the left of Figure 33 on the next page and were asked whether they feel there are currently not enough, about the right amount, or too many of each type in San Carlos. Public swimming pools stood out as the amenity that most residents would like to see more of, with 63% indicating that there are not enough in San Carlos. For each of the remaining amenities, at least three-quarters of respondents felt the amount was about right or were unsure, and the percentage who felt there was not enough ranged from 10% (bocce ball courts) to 25% (restrooms at parks). For each recreational

and community amenity, respondents were much more likely to feel that there are not enough versus too many in San Carlos.

Question 21 Next, I'm going to read a short list of recreational and community amenities in San Carlos. For each that I read, I'd like to know how you feel about their availability.

FIGURE 33 AVAILABILITY OF RECREATIONAL & COMMUNITY AMENITIES

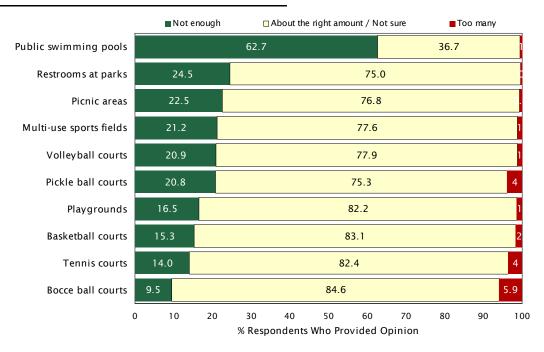


Table 16 shows the percentage of respondents who felt there was *not enough* of each recreational or community amenity by age of the respondent and presence of a child in the household, with the top three within each subgroup highlighted in green to ease comparisons. Public swimming pools garnered the top response among each subgroup, whereas second and third place varied considerably by age and presence of a child in the household.

TABLE 16 AVAILABILITY OF RECREATIONAL & COMMUNITY AMENITIES BY AGE AND CHILD IN HSLD (SHOWING % NOT ENOUGH)

			Children in Hsld (Q23,QD3)					
	Under 35	35 to 44	45 to 54	55 to 64	65 or over	Yes,	Yes,	No
	Olidei 33	33 10 44	43 (0 34	33 10 04	03 OI OVEI	under 13	teenager	children
Public swimming pools	70.7	74.5	65.3	54.0	48.5	81.1	76.4	54.4
Restrooms at parks	40.3	18.0	22.3	19.8	22.1	22.8	26.0	25.6
Picnic areas	22.3	24.9	21.1	19.8	24.6	24.2	20.0	22.4
Multi-use sports fields	23.5	17.3	32.1	17.5	16.9	29.9	31.3	16.2
Volleyball courts	40.0	16.5	18.1	18.7	15.1	22.2	35.4	19.0
Pickle ball courts	20.2	13.3	24.5	26.9	22.9	22.3	26.1	19.4
Playgrounds	17.6	25.8	9.9	9.4	18.9	25.4	11.0	13.9
Basketball courts	29.2	11.4	23.2	5.9	9.6	19.5	23.4	13.0
Tennis courts	10.9	18.6	16.3	10.6	13.9	17.5	17.5	12.2
Bocce ball courts	8.4	9.4	8.9	8.3	10.4	6.2	3.7	12.1

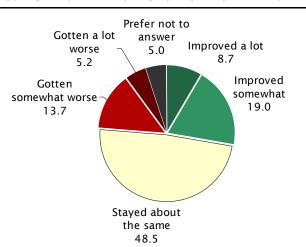
## FINANCES & DAYCARE

The last substantive section of the survey asked respondents to reflect on their household's financial situation over the past two years and for those with children under 13 years of age, their experience searching for daycare services during this same time period.

FINANCIAL SITUATION The first question in this section asked residents about their household's financial situation over the past two years. Close to half of residents (49%) indicated that their household's financial situation has stayed about the same over the past two years (see Figure 34). Approximately 28% indicated that their household's financial situation had improved, whereas 19% reported that their household's financial situation had worsened during this period. An additional 5% preferred to not answer the question.

**Question 24** Over the past two years, has your household's financial situation improved a lot, improved somewhat, stayed about the same, gotten somewhat worse, or gotten a lot worse?

FIGURE 34 HSLD FINANCIAL SITUATION PAST 2 YEARS



For the interested reader, figures 35-37 break down responses to Question 24 by demographic subgroups.

FIGURE 35 HSLD FINANCIAL SITUATION PAST 2 YEARS BY YEARS IN SAN CARLOS, OVERALL SATISFACTION & CHILD IN HSLD

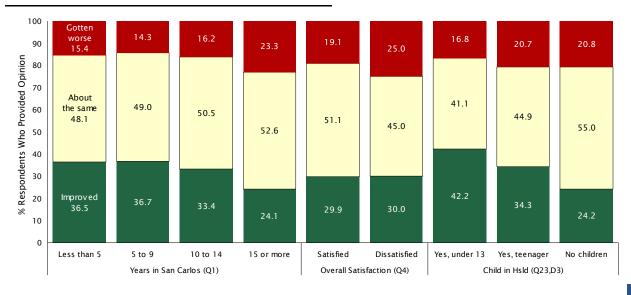


FIGURE 36 HSLD FINANCIAL SITUATION PAST 2 YEARS BY EMPLOYMENT STATUS & HOME OWNERSHIP STATUS

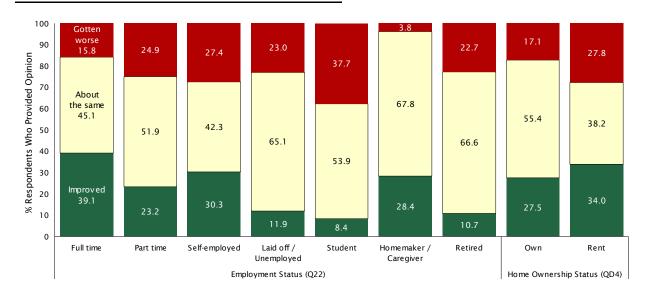
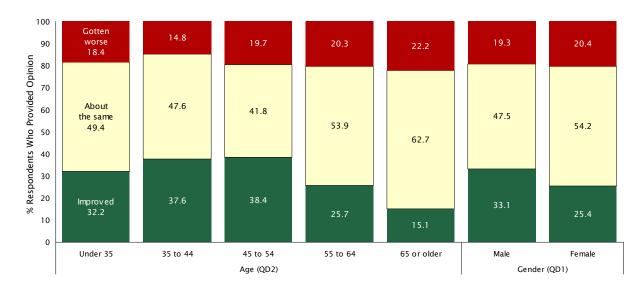


FIGURE 37 HSLD FINANCIAL SITUATION PAST 2 YEARS BY AGE & GENDER



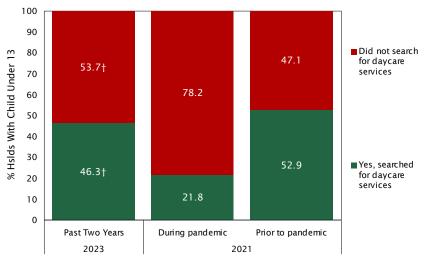
DAYCARE SERVICES IN SAN CARLOS Finding suitable childcare services can be a challenge for some families, and the pandemic was expected to make this challenge even more difficult as many childcare providers closed their programs to follow public health regulations and guidelines. To get a sense for how the pandemic impacted the availability of suitable childcare services in San Carlos, the 2021 survey asked respondents with at least one child under 13 in their home whether they had searched for daycare services for their child in San Carlos before the pandemic in 2019 and during the pandemic in 2021. The current 2023 survey asked respondents the same question framed over the past two years.

As shown in Figure 38 on the next page, 46% of respondents with at least one child under 13 years of age had searched for daycare services during the past two years. Although this level is

much higher than the percentage recorded during the pandemic (22%), it slightly lower than—but statistically consistent with—the pre-pandemic level (53%).

**Question 25** During the past two years, have you searched for daycare services for your child in San Carlos?

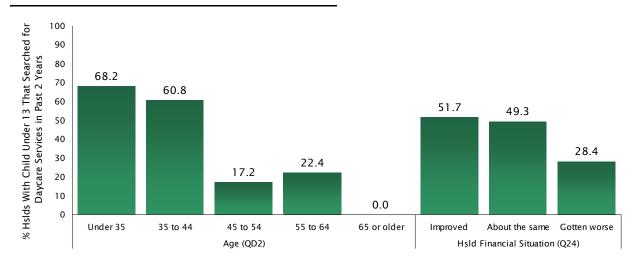
FIGURE 38 SEARCHED FOR DAYCARE SERVICES IN PAST 2 YEARS BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2021 and 2023 studies.

Figure 39 displays whether households had searched for daycare services by the respondent's age and household financial status. As might be expected, younger respondents under 35 years of age were the most likely to have searched for daycare services, followed by those 35 to 44 years of age. Respondents with a child under 13 years of age who also stated that their household's financial situation had improved or stayed about the same over the past two years were much more likely to have searched for daycare services than those whose situation had gotten worse.

FIGURE 39 SEARCHED FOR DAYCARE SERVICES IN PAST 2 YEARS BY AGE & HSLD FINANCIAL SITUATION

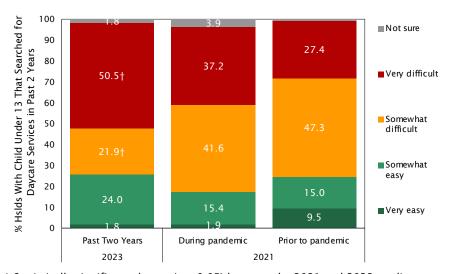


Having established which respondents had searched for childcare services in San Carlos, the survey next asked these individuals to rate how easy or difficult it was to find suitable daycare services in San Carlos (see Figure 40). Among those who had searched for daycare services in San Carlos over the past two years, the majority (51%) stated that it was very difficult and 22% said it was somewhat difficult to find suitable daycare, whereas one-quarter indicated it was either somewhat easy (24%) or very easy (2%).

Although the overall percentage (72%) of respondents with children under 13 who had searched for daycare services and found it difficult stayed statistically consistent with the levels recorded both during (79%) and prior to (75%) the pandemic, the intensity shifted in 2023 with a higher percentage reporting that it was very difficult.

Question 26 Would you say it has been very easy to find suitable daycare services in San Carlos, somewhat easy, somewhat difficult, or very difficult?

FIGURE 40 EASE OF FINDING DAYCARE BY STUDY YEAR



 $\dagger$  Statistically significant change (p < 0.05) between the 2021 and 2023 studies.

## BACKGROUND & DEMOGRAPHICS

Table 17 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 crosstabulations for more details).

TABLE 17 DEMOGRAPHICS OF SAMPLE BY STUDY YEAR<sup>6</sup>

	Study Year							
	2023	2021	2020	2018	2016	2014		
Total Respondents	721	720	744	560	754	410		
Years in San Carlos (Q1)								
Less than 5	19.2	17.7	19.4	26.5	20.1	20.2		
5 to 9	11.2	11.2	16.0	16.8	16.6	16.7		
10 to 14	12.5	14.7	13.4	13.0	14.4	16.2		
15 or more	56.7	56.2	51.0	43.4	47.9	46.6		
Prefer not to answer	0.4	0.1	0.2	0.2	1.0	0.2		
Gender (QD1)								
Male	48.4	46.7	47.7	48.1	43.9	46.8		
Female	49.4	48.9	49.6	48.1	49.7	48.5		
Non-binary	0.2	N/A	N/A	N/A	N/A	N/A		
Prefer not to answer	2.0	4.4	2.7	3.9	6.3	4.6		
Age (QD2)								
18 to 34	19.1	18.3	18.6	18.4	17.1	16.5		
35 to 44	19.5	19.3	18.9	19.8	19.1	21.2		
45 to 54	18.5	19.9	20.5	20.8	19.2	19.3		
55 to 64	17.8	18.6	17.7	19.4	15.2	16.3		
65 or older	18.0	19.9	18.4	18.6	16.3	15.4		
Prefer not to answer	7.2	4.0	5.9	3.0	13.0	11.2		
Child in household (Q23,D3)								
Yes	37.0	35.8	35.6	36.3	38.2	44.0		
Under 13	23.9	24.8	N/A	N/A	N/A	N/A		
Teenager	18.7	16.9	N/A	N/A	N/A	N/A		
No	59.6	61.6	58.7	59.8	57.9	52.2		
Prefer not to answer	3.4	2.6	5.7	3.9	3.9	3.9		
Home ownership status (QD4)								
Own	69.0	77.9	73.6	78.1	82.9	80.6		
Rent	25.4	19.6	22.0	20.7	13.1	19.1		
Live rent free with family, friends	4.9	N/A	N/A	N/A	N/A	N/A		
Prefer not to answer	0.7	2.5	4.4	1.3	4.0	0.2		
Employment status (Q22)								
Full time	53.3	49.2	57.7	57.8	60.8	N/A		
Part time	4.2	5.3	10.0	8.9	10.5	N/A		
Self-employed	10.7	8.9	N/A	N/A	N/A	N/A		
Laid off, furloughed	1.6	2.0	N/A	N/A	N/A	N/A		
Student	3.8	3.1	4.0	6.7	2.9	N/A		
Homemaker / Caregiver	2.5	3.3	2.2	2.5	3.4	N/A		
Retired	20.4	24.1	20.3	17.4	16.4	N/A		
Not employed, but looking for work	1.5	1.3	1.1	1.9	1.7	N/A		
Prefer not to answer	2.0	2.8	4.8	4.7	4.4	N/A		

<sup>6.</sup> Prior to 2021, the *not employed, but looking for work* category of employment status was classified as *inbetween jobs*.

### 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 49) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

Many of the questions asked in the 2023 survey were tracked directly from the 2021 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 pass-code-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. Once selected at random, contact information was appended to each record including email addresses and telephone numbers for adult residents. Individuals were subsequently recruited to participate in the survey through multiple recruiting methods. Using a combination of email and text invitations, sampled residents were initially invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Each individual was assigned a unique passcode to ensure that only San Carlos residents who received an invitation could access the online survey site, and that the survey could be completed only one time per passcode. An email reminder notice was also sent to encourage participation among those who had yet to take the survey. Following a period of online data collection, True North began placing telephone calls to land lines and cell phone numbers of sampled residents that had yet to participate in the online survey or for whom only telephone contact information was available.

Telephone 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 721 completed surveys were gathered online and by phone between April 5 and April 17, 2023.

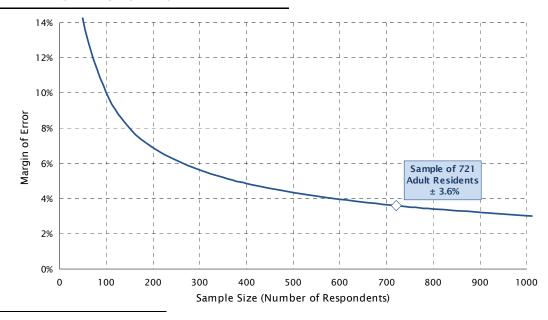
MARGIN OF ERROR DUE TO SAMPLING The results of the survey can be used to estimate the opinions of all adult residents of the City. Because not every adult resident of the City participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 721 adult residents for a particular question and what would have been found if all of the estimated 23,484 adult residents<sup>7</sup> 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 (0.39 for 39% in this example), N is the population size of all adults (23,484), n is the sample size that received the question (721), 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  $\pm$  3.5%. This means that with 39% 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 36% and 43%.

FIGURE 41 MAXIMUM MARGIN OF ERROR



<sup>7.</sup> Source: U.S. Census Bureau, 2021 American Community Survey 1-Year Estimates.

Figure 41 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  $\pm$  3.6% for questions answered by all 721 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 41 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 2021 and 2023 studies. The final data were weighted to balance the sample by key demographics 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%.

# QUESTIONNAIRE & TOPLINES



City of San Carlos Community Satisfaction Survey Final Toplines (n=721) April 2023

#### 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 - Lane Line 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	14%				
	3	5 to 9 years	11%				
	4	10 to 14 years	13%				
	5	15 years or longer	57%				
	99	Prefer not to answer	0%				

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San Carlos Resident Survey April 2023

	1	Excellent	39%				
	2	Good	52%				
	3	Fair	8%				
	4	Poor	1%				
	5	Very poor	0%				
	98	Not sure	0%				
	99	Prefer not to answer	0%				
Q3	now		g to make San Carlos a better place to live ou like to see? Verbatim responses recorde ow.				
	Limi	t growth, development	15%				
	Impi	rove, maintain infrastructure	10%				
	Prov	ide affordable housing	9% 8%				
	Redu	uce traffic congestion					
	Add	, improve sidewalks, bike lanes	7%				
	Impi	rove, address downtown parking issues	7% 7% 6%				
	Not	sure / Cannot think of anything					
	Impi	rove public safety					
	Prov	ide, improve parks, rec areas	6%				
	have	ease police presence, faster response, e own police department	6%				
	Stree	rove, preserve walkability, keep Laurel et closed	6%				
	No c	hanges / Everything is fine	6%				
	Enfo	rce traffic laws	5%				
	Impi	rove develop downtown area	3%				
	Impi	rove environmental efforts	3%				
	Impi	rove schools, education	2%				
	Put i	utility wires underground	2%				
	Impi	rove shopping, dining options	2%				
	Add	community pool	2%				
	Enco	ourage, support small business	2%				
	Ope	n up Laurel Street	2%				

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Section 4: City Services
Next, I would like to ask a series of questions about se

ervices 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? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?							
	1	Very satisfied	36%					
	2	Somewhat satisfied	47%					
	3	Somewhat dissatisfied	7%					
	4	Very dissatisfied	3%					
	98	Not sure	7%					
	99	Prefer not to answer	0%					

For each of the services I read, please tell me whether the service is extremely Q5 For each of the services Freau, please terrine which is no not at all important, important, or not at all important.

	important to you, very important, somewhat important, or not at an important.										
	Randomize	Extremely Important	Very Important	Somewhat Important	Not at all Important	Not sure	Prefer not to answer				
Α	Providing police services	53%	28%	15%	4%	0%	0%				
В	Maintaining a low crime rate	65%	25%	6%	2%	1%	0%				
С	Preparing the City for fire, police and public works emergencies and disasters	50%	38%	10%	1%	0%	0%				
D	Providing fire protection, prevention and emergency medical services	65%	29%	5%	1%	0%	0%				
Е	Reducing traffic congestion on city streets	31%	30%	26%	12%	1%	1%				
F	Providing library services	35%	41%	19%	4%	0%	1%				
G	Providing trash collection and recycling services	51%	36%	11%	1%	0%	1%				
Н	Keeping public buildings and facilities clean and attractive	27%	40%	30%	3%	0%	0%				
I	Maintaining local streets	45%	42%	12%	1%	0%	0%				
J	Providing parks, sports fields and recreation facilities	44%	37%	17%	1%	0%	0%				
K	Maintaining storm drains, sewers and creeks	58%	32%	9%	0%	0%	0%				
L	Providing recreation programs for youth	30%	45%	19%	5%	1%	0%				
М	Providing recreation programs for adults and seniors	22%	35%	33%	8%	1%	0%				
N	Providing more public parking downtown	16%	26%	36%	20%	1%	1%				
0	Holding special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk & others	22%	36%	35%	7%	0%	0%				

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Р	Promoting economic development to stimulate the local economy	20%	37%	30%	10%	2%	0%
Q	Preserving community character and appearance through building and planning permits, inspections and code enforcement	31%	28%	26%	14%	0%	0%
R	Providing safe streets	59%	28%	11%	1%	1%	0%
S	Providing affordable housing	27%	23%	28%	19%	1%	1%
Т	Establishing and maintaining financial reserves	24%	44%	26%	5%	2%	0%
U	Having city-provided resources and facilities available to residents during PG&E power shut-offs	30%	37%	25%	7%	1%	0%
V	Making downtown more pedestrian friendly	33%	32%	22%	12%	1%	0%
W	Adding sidewalks where needed	30%	28%	30%	11%	1%	1%
Q6	Are you satisfied or dissatisfied with the city' opinion? Get answer. If 'satisfied' or 'dissatis (satisfied/dissatisfied) or somewhat (satisfied	fied', th	en ask:	Would	that be	ot have very	I
	Randomize	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
Α	Describe a cline complete						
	Provide police services	36%	36%	12%	5%	9%	2%
В	Maintain a low crime rate	36%	36% 41%	12%	5% 7%	9% 4%	2% 1%
С							-/-
	Maintain a low crime rate  Prepare the City for fire, police and public	34%	41%	13%	7%	4%	1%
С	Maintain a low crime rate Prepare the City for fire, police and public works emergencies and disasters Provide fire protection, prevention and	34%	41%	13%	7% 3%	4%	1%
C D	Maintain a low crime rate Prepare the City for fire, police and public works emergencies and disasters Provide fire protection, prevention and emergency medical services Reduce traffic congestion on city streets Provide library services	34% 25% 41%	41% 40% 38%	13% 11% 5%	7% 3% 2%	4% 20% 14%	1% 2% 1%
C D E	Maintain a low crime rate  Prepare the City for fire, police and public works emergencies and disasters  Provide fire protection, prevention and emergency medical services  Reduce traffic congestion on city streets  Provide library services  Provide trash collection and recycling services	34% 25% 41% 18%	41% 40% 38% 34%	13% 11% 5% 25%	7% 3% 2% 10%	4% 20% 14% 10%	1% 2% 1% 2%
C D E F	Maintain a low crime rate Prepare the City for fire, police and public works emergencies and disasters Provide fire protection, prevention and emergency medical services Reduce traffic congestion on city streets Provide library services Provide trash collection and recycling	34% 25% 41% 18% 55%	41% 40% 38% 34% 31%	13% 11% 5% 25% 2%	7% 3% 2% 10% 1%	4% 20% 14% 10% 9%	1% 2% 1% 2% 1%
C D E G	Maintain a low crime rate  Prepare the City for fire, police and public works emergencies and disasters  Provide fire protection, prevention and emergency medical services  Reduce traffic congestion on city streets  Provide library services  Provide trash collection and recycling services  Keep public buildings and facilities clean and attractive  Maintain local streets	34% 25% 41% 18% 55% 53%	41% 40% 38% 34% 31% 36%	13% 11% 5% 25% 2% 4%	7% 3% 2% 10% 1%	4% 20% 14% 10% 9% 5%	1% 2% 1% 2% 1% 2% 2%
C D E F G	Maintain a low crime rate  Prepare the City for fire, police and public works emergencies and disasters  Provide fire protection, prevention and emergency medical services  Reduce traffic congestion on city streets  Provide library services  Provide trash collection and recycling services  Keep public buildings and facilities clean and attractive	34% 25% 41% 18% 55% 53% 40%	41% 40% 38% 34% 31% 36% 46%	13% 11% 5% 25% 2% 4% 4%	7% 3% 2% 10% 1% 1%	4% 20% 14% 10% 9% 5%	1% 2% 1% 2% 1% 2% 1%
C D E F G H	Maintain a low crime rate  Prepare the City for fire, police and public works emergencies and disasters  Provide fire protection, prevention and emergency medical services  Reduce traffic congestion on city streets  Provide library services  Provide trash collection and recycling services  Keep public buildings and facilities clean and attractive  Maintain local streets  Provide parks, sports fields and recreation	34% 25% 41% 18% 55% 53% 40% 24%	41% 40% 38% 34% 31% 36% 46% 43%	13% 11% 5% 25% 2% 4% 4% 19%	7% 3% 2% 10% 1% 1% 1%	4% 20% 14% 10% 9% 5% 8%	1% 2% 1% 2% 1% 2% 1% 2% 1% 2%
C D E F G H I	Maintain a low crime rate  Prepare the City for fire, police and public works emergencies and disasters  Provide fire protection, prevention and emergency medical services  Reduce traffic congestion on city streets  Provide library services  Provide trash collection and recycling services  Keep public buildings and facilities clean and attractive  Maintain local streets  Provide parks, sports fields and recreation facilities  Maintain storm drains, sewers and creeks  Provide recreation programs for youth	34% 25% 41% 18% 55% 53% 40% 24% 45%	41% 40% 38% 34% 31% 36% 46% 43%	13% 11% 5% 25% 2% 4% 4% 19%	7% 3% 2% 10% 1% 1% 1% 1%	4% 20% 14% 10% 9% 5% 8% 5%	1% 2% 1% 2% 1% 2% 1% 2% 1%
C D E F G H I K	Maintain a low crime rate  Prepare the City for fire, police and public works emergencies and disasters  Provide fire protection, prevention and emergency medical services  Reduce traffic congestion on city streets  Provide library services  Provide trash collection and recycling services  Keep public buildings and facilities clean and attractive  Maintain local streets  Provide parks, sports fields and recreation facilities  Maintain storm drains, sewers and creeks	34% 25% 41% 18% 55% 53% 40% 24% 45% 20%	41% 40% 38% 34% 31% 36% 46% 43% 41%	13% 11% 5% 25% 2% 4% 4% 19% 8%	7% 3% 2% 10% 1% 1% 1% 8% 1% 9%	4% 20% 14% 10% 9% 5% 8% 5% 4% 6%	1% 2% 1% 2% 1% 2% 1% 2% 1% 2% 1% 2%

О	Hold special community events like summer concerts in the park, Night of Holiday Lights, Goblin Walk & others	48%	35%	4%	1%	10%	1%
Р	Promote economic development to stimulate the local economy	19%	41%	12%	3%	23%	3%
Q	Preserve community character and appearance through building and planning permits, inspections and code enforcement	22%	39%	16%	9%	12%	1%
R	Provide safe streets	32%	39%	18%	6%	5%	1%
S	Provide affordable housing	14%	24%	22%	15%	23%	3%
Т	Establish and maintain financial reserves	16%	34%	6%	1%	39%	3%
U	Have city-provided resources and facilities available to residents during PG&E power shut-offs	13%	31%	15%	8%	30%	2%
V	Make downtown more pedestrian friendly	29%	47%	13%	4%	5%	2%
W	Add sidewalks where needed	21%	39%	17%	5%	17%	1%

Sect	Section 5: Alternative Transportation									
Q7	In a typical <b>month</b> , how many days do you: when traveling in San Carlos?									
	Read in Order	0	1 to 5	6 to 10	11 to 15	16 to 20	5	26 to 30		
Α	Use <b>public transit</b> such a bus, train, or shuttle	81%	13%	2%	1%	2%	0%	0%		
В	Ride a <b>bicycle</b> for a trip you would otherwise make by vehicle	79%	16%	2%	1%	1%	0%	1%		
С	Walk, jog or run for a trip you would otherwise make by vehicle	26%	34%	15%	5%	7%	4%	8%		
D	Use an <b>E-bike</b> or <b>E-scooter</b>	93%	4%	1%	1%	1%	1%	0%		
Q8	When you are: in San Carlos, would you safe, somewhat unsafe, or very unsafe?	say th	at you	feel v	ery sa	afe, so	mewha	t		
Only	in Order. v ask item A if Q7A>0. v ask item C if Q7B>0 OR Q7D>0.	Very Safe	Somewhat	Somewhat	Unsafe	Very Unsafe	Not sure	Prefer not to answer		
Α	Riding public transit	51%	40%	49	%	0%	4%	2%		
В	Walking across intersections	36%	45%	16	%	3%	0%	0%		
С	Bicycling on local streets	20%	46%	21	%	10%	2%	1%		

Sect	ion 6	: Local Governance & Customer Service	:					
	Next each	t, I'm going to read you a series of staten n, I'd like you to tell me whether you agre	nents ab e or disa	out the agree w	City of ith the	San state	Carlos. F ment.	or
Q9	opin	e is the (first/next) one: Do you agr iion? <i>If agree or disagree, ask</i> : Would tha ewhat (agree/disagree)?						ın
	Rand	domize	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly	Disagree Not sure	Prefer not to answer
Α	The	City is <b>responsive</b> to residents' needs	12%	44%	17%	7%	18%	2%
В	The	City manages its <b>finances</b> well	13%	32%	8%	3%	40%	3%
С	The City <b>listens</b> to residents when making important decisions			35%	19%	109	6 21%	3%
D	l tru	st the City of San Carlos	25%	46%	13%	5%	9%	1%
Q10	How much attention do you pay to the issues, decisions and activities of <u>your</u> City government? Would you say that you are very attentive, somewhat attentive, slightly attentive, or not at all attentive?							
	1	Very attentive			10	)%		
	2	Somewhat attentive			43	3%		
	3	Slightly attentive			37	7%		
	4	Not at all attentive			8	%		
	98	Not sure			1	%		
	99	Prefer not to answer			0	%		
Q11	In th	ne past 12 months, have you been in cont	act with	staff fr	om the	City	of San C	arlos?
	1	Yes		39%		Ask	Q12	
	2	No		58%		Skip	to Q13	
	98	Not sure		2%		Skip	to Q13	
	99	Prefer not to answer		1%		Skip	to Q13	
Q12	In yo	our opinion, was the staff at the City very d one item at a time, continue until all ite	, s ms are i	omewh	at	, or ı	not at all	·
Rand	domiz	re	Very	Somewhat		Not at all	Not sure	Prefer not to answer
Α	Help	ful	50%	36%	7	%	4%	3%
В	Prof	essional	69%	25%	3	%	2%	1%
С	Acce	essible	48%	42%	7	%	2%	1%

	Overall, are you satisfied or dissatisfied with t	
Q13 v	esidents through electronic and print newslet vebsite, and other means? <i>Get answer, then a</i>	sk: Would that be very
	satisfied/dissatisfied) or somewhat (satisfied)	<i>'</i>
-	1 Very satisfied	38%
	2 Somewhat satisfied	46%
	3 Somewhat dissatisfied	9%
	4 Very dissatisfied	2%
Š	98 Not Sure	5%
ġ	Prefer not to answer	0%
Q14 a	What information sources do you use to find c and programs? <i>Don't read list. Record up to fi</i>	
Newsie	1 City Newsletters <i>mailed</i> to your home	5.5%
	2 City Newsletters sent by <i>email</i>	14%
-	3 San Francisco Chronicle (daily newspaper)	4%
	4 San Mateo Daily Journal (daily newspaper)	9%
	5 Daily Post (daily newspaper)	6%
	6 Other newspaper	2%
	7 San Carlos Patch (online newspaper)	5%
TV, Ra	dio & Meetings	
	8 Local TV Channels 27 or 99	1%
	9 Television (general)	4%
1	City Council and Commission Meetings	2%
1	11 Radio	1%
Interne	et & Email	
1	12 City's website	23%
	13 Internet (not City's site)	10%
	14 Email notification from City	18%
1	15 Blogs	0%
Social	Media	
1	16 Facebook	10%
1	17 Twitter	3%
1	18 Nextdoor	16%
	19 Instagram	4%

	20	YouTube			0%		
	21	Other social media site			1%		
Mail	/Poste	ers/Other	I				
	22	Postcards, letters, flyers or brochures (mailed to home)	25%				
	23	Flyers, brochures or posters (displayed at public facilities)	6%				
	24	Street banners			10%		
	25	Billboard at Adult Community Center	1% 7% 1% 1%				
	26	Friends/Family/Associates					
	27	Other source					
	28	Do Not Receive Information about City					
	98	Not sure			1%		
	99	Prefer not to answer	1%				
Q15	I'd li	read the following ways that the City of S ke to know if you think they would be ve ctive way for the City to communicate wit	ry effectiv				
	Rai	ndomize	Very Effective	Somewhat Effective	Not Effective	Not Sure	Prefer not to answer
Α	New	sletters sent by <i>email</i>	40%	38%	12%	9%	2%
В	New			2.20/	10%	2%	2/0
С	Text	sletters <i>mailed</i> to your home	55%	32%	10/0	2/0	1%
D	Ema	sletters <i>mailed</i> to your home messages	55% 40%	27%	22%	9%	_,-
		messages				_,-	1%
E	City'	messages	40%	27%	22%	9%	1%
F		messages il	40% 44%	27% 40%	22% 9%	9%	1% 2% 1%
	Adve	messages il 's Website	40% 44% 24%	27% 40% 45%	22% 9% 22%	9% 6% 7%	1% 2% 1% 2%
F	Adve Socia Doo Com	r messages  il  s Website ertisements in local papers al media like Facebook, Twitter, Next r, and YouTube amunity outreach meetings	40% 44% 24% 6%	27% 40% 45% 24%	22% 9% 22% 57%	9% 6% 7% 12%	1% 2% 1% 2% 1%
F G	Adve Socia Doo Com Tele	messages  il s Website ertisements in local papers al media like Facebook, Twitter, Next r, and YouTube	40% 44% 24% 6% 25%	27% 40% 45% 24% 31%	22% 9% 22% 57% 31%	9% 6% 7% 12% 11%	1% 2% 1% 2% 1% 2% 1% 2%

	Ask Q16 if Q15	5G=(1,2).							
Q16	What is your <i>preferred</i> Social Media site – the one you currently use most often? Verbatim responses recorded and later grouped into categories shown below.								
	Instagram	32%							
	Facebook	30%							
	Nextdoor	1 2%							
	Twitter	1 0%							
	Not sure / Cannot think of any	6%							
	Email	2%							
	Reddit	2%							
	YouTube	2%							
	Other	2%							
	LinkedIn	1%							
	TikTok	1%							
	None / Don't use social media regularly	1%							

### Section 8: Development & Housing

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

Q17	As I read the following housing types, please too much, about the right amount, or too litt Carlos.			

	Carios.					
	Randomize	Too Much	About Right	Too Little	Not sure	Prefer not to answer
Α	Housing that is affordable for <b>middle</b> -income families	4%	22%	57%	15%	2%
В	Housing that is affordable for <b>low-income</b> families	10%	15%	50%	23%	2%
С	Single family homes	14%	57%	1 7%	11%	1%
D	Condominiums	21%	40%	18%	20%	1%
E	Apartments with 7 or more units	25%	31%	20%	23%	2%
F	Apartments with 6 units or less	10%	39%	20%	28%	3%
G	Townhomes	12%	46%	18%	23%	1%
Н	Duplexes	9%	35%	24%	31%	2%
I	Senior housing	4%	31%	30%	34%	2%
J	Accessory dwelling units - also referred to as granny flats or guest houses	11%	23%	24%	40%	2%

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K	indi	cial needs housing for families and viduals who need support services like training and social services	5%	18%	31%	45%	2%			
L		rim housing to help people trying to sition from being homeless	10%	13%	31%	42%	3%			
Q18	In th	n the past three years, would you say the pace of development in San Carlos has been oo fast, about right, or too slow?								
	1		39%							
		Too fast			39%					
	2	About right			39% 41%					
	2									
		About right			41%					

#### **Section 9: Funding Priorities**

The City of San Carlos has the financial resources to provide *some* of the services, programs and projects desired by residents. However, because it can't fund *every* service, program and project, the City must set priorities.

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.

	Randomize	High Priority	Medium Priority	Low Priority	Should not spend money	Not sure	Prefer not to answer
Α	Police services	58%	24%	13%	2%	2%	1%
В	Fire protection services	66%	27%	5%	0%	2%	1%
С	Street maintenance and repair	57%	34%	6%	1%	1%	1%
D	Infrastructure maintenance and repair	58%	33%	6%	0%	2%	1%
Е	Recreation programs and services	23%	54%	18%	2%	2%	1%
F	Park and landscape maintenance	27%	60%	11%	1%	1%	1%
G	Community events and activities	20%	50%	26%	3%	2%	1%
Н	Housing programs	31%	26%	26%	13%	4%	1%
I	Public transportation	21%	35%	33%	7%	3%	1%
J	Bicycle and pedestrian access/ improvements	30%	37%	26%	6%	1%	1%
K	Community outreach including meetings and mailings	9%	41%	41%	6%	3%	1%
L	Climate change mitigation, adaptation, and sustainability programs	28%	35%	22%	12%	3%	1%
М	Improve the network of trails, creating better access and connectivity between open space areas	20%	38%	33%	5%	2%	1%

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Q20	Is there another item or project not already me priority for the City to fund? If yes, ask: Pleas recorded and later grouped into categories sl	e describ	e describe it to me. Verbatim responses					
	No other high priorities / Nothing comes to mind	10WII Del	Ow.	58%				
	Maintain city infrastructure, sidewalks			5%				
	Improve public safety, more police patrols			3%				
	Limit growth, maintain open space			3%				
	Provide more affordable housing			3%				
	Provide more rec centers, facilities			3%				
	Address parking issues	3% 3%						
	Improve economy, support for local business							
	Improve education, add more schools			2%				
	Reduce traffic			2%				
	Enforce traffic laws	2% 2% 2% 2% 2% 1%						
	Address environmental issues, preparedness							
	Underground power lines							
	Improve city planning, development							
	Beautify city, landscaping							
	Provide public transportation							
	Provide, improve dog parks			1%				
	Provide assistant for seniors, disabled			1%				
	Improve street sweeping efforts			1%				
Q21	Next, I'm going to read a short list of recreat Carlos. For each that I read, I'd like to know h Here is the (first/next) one: Would you amount, or too many of these in San Carlos?	now you f	eel abou	t their <i>av</i>	ailability.	right		
	Randomize	Not enough	About the right amount	Too many	Not sure	Prefer not to answer		
Α	Public swimming pools	62%	16%	1%	20%	1%		
В	Pickle ball courts	20%	37%	4%	37%	2%		
С	Bocce ball courts	9%	53%	6%	30%	2%		
_				1				
D	Tennis courts	14%	65%	3%	16%	2%		
	Tennis courts Basketball courts	14% 15%	65% 64%	3% 2%	16% 18%	2% 2%		
D								

Н	Picnic areas		65%	1%	10%	2%
I	Restrooms at parks		64%	0%	10%	2%
J	Playgrounds	16%	70%	1%	11%	1%

<i>c .:</i>	10.5 / .5. 0.5				
Section 10: Employment, Finances & Daycare  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 caregiver, or retired?					
1	Employed full-time	5	3%		
2	Employed part-time		4%		
3	Self-employed	1	1%		
4	Laid-off/furloughed		2%		
5	Not employed, but looking for work		2%		
6	Student		4%		
7	Homemaker/caregiver		3%		
8	Retired	2	0%		
99	Prefer not to answer		2%		
Q23 Do	Q23 Do you have one or more children <b>under</b> the age of 13 living in your household?				
1	Yes	2	4%		
2	No	7	'3%		
99			3%		
Q24 im	Over the past two years, has your household's <b>financial situation</b> improved a lot, improved somewhat, stayed about the same, gotten somewhat worse, or gotten a lot worse?				
1	Improved a lot		9%		
2	Improved somewhat	1	9%		
3	Stayed about the same	49%			
4	Gotten somewhat worse	1 4%			
5	Gotten a lot worse	5% 5%			
99	9 Prefer not to answer				
•	Ask Q25 if Q23=1. Otherwise s	kip to intro preceding	D1.		
	During the past two years, have you searched for <b>daycare services</b> for your child in San Carlos?				
1	Yes	46%	Ask Q26		
2	No	53%	Skip to D1		
99	9 Prefer not to answer	1%	Skip to D1		

Q26	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	24%	
	3	Somewhat difficult	22%	
	4	Very difficult	51%	
	98	Not sure	2%	
	99	Prefer not to answer	0%	

### Section 11: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

statistical purposes.				
D1	What is your gender?			
	1	Male	48%	
	2	Female	49%	
	3	Non-binary	0%	
	99	Prefer not to answer	2%	
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		19%	
	55 to 64		18%	
	65 or older Prefer not to answer		18%	
			7%	
D3	Do you have a teenager between the ages of 13 and 18 living in your household?			
	1	Yes	19%	
	2	No	78%	
	99	Prefer not to answer	3%	

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D4	Do you own or rent your residence in San Carlos?				
	1	Own	69%		
	2	Rent	25%		
	3	Live rent free with family or friends	5%		
	99	Prefer not to answer	1%		

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

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