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INTRODUCTION

Nestled in the foothills of North County, the City of Escondido is a diverse community known for its rich history, small town-charm, vibrant downtown, world-class arts, and a progressive vision for its future. Established in 1888 and currently home to an estimated 152,739 residents¹, the City's team of full-time and part-time employees provides a full suite of municipal services including police, fire, public works, planning, parks, and community services.

To monitor its progress in meeting residents' needs, the City of Escondido engages residents on a weekly 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 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 thereby 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 provide City 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, planning, and community engagement.

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

- Identify key issues of importance for residents, as well as their perceptions of the quality of life in Escondido;
- 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 policy topics including affordable housing, recreation, cannabis, and funding priorities;
- 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.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 43). In brief, the survey was administered to a random sample of 2,000 adults who reside within the City of Escondido. The

1. Source: California Department of Finance estimate for January 2019.

survey followed a mixed-method design that employed multiple recruiting methods (mail, email, and telephone) and multiple data collection methods (telephone and online). Administered in English and Spanish between June 3 and June 9, 2020, the average interview lasted 18 minutes.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 46), and a complete set of crosstabulations for the survey results is contained in Appendix A.

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

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

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

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,000 survey research studies for public agencies—including more than 400 studies for California municipalities and special districts.



JUST THE FACTS

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

QUALITY OF LIFE

- When asked to rate Escondido on a number of dimensions, residents provided the most positive ratings for the overall quality of life in the City (65% excellent or good), followed by Escondido as a place to shop and dine (52%), as a place to raise a family (47%), and as a place to play and recreate (45%).
- When compared to the other dimensions tested, residents provided softer ratings for Escondido as a place to retire (42% excellent or good) and a place to work (38%).
- Residents were most apt to cite the parks and recreation facilities/opportunities in Escondido as the thing they like most about living in Escondido and would like to see preserved in the future (15%), followed by the downtown area/Grand Avenue (13%), diversity of businesses, culture and activities (10%), small town feeling (10%), the shopping and dining opportunities in Escondido (10%), and open space/green spaces in the City (10%).
- When asked what change the city government could make to improve the quality of life in the City, approximately 15% could not think of a change they desire (11%) or reported that no changes are needed/everything is fine (4%). Among specific changes desired, the most common were improving public safety/more police presence (17%), addressing homeless issues (15%), improving infrastructure, streets and/or sidewalks (11%), cleaning-up/beautifying the City and landscape/removing graffiti (9%), and improving parks and recreation 7%.

CITY SERVICES

- Overall, nearly three-quarters of Escondido residents indicated they were very (18%) or somewhat (54%) satisfied with the City's efforts to provide municipal services. Approximately 20% were very or somewhat dissatisfied, whereas 8% were unsure or unwilling to share their opinion.
- When asked to rate the *importance* of 18 specific services provided by the City, maintaining and repairing local streets and roads (94% extremely or very important), providing paramedic and emergency medical services (94%), providing fire protection and prevention services (94%), reducing crime and gang activity (93%), maintaining sewer and storm drain systems (92%), and preparing the City for emergencies and natural disasters (89%) received the highest importance ratings from residents.
- For the same list of 18 services, respondents were most *satisfied* with the City's efforts to provide fire protection and prevention services (93% very or somewhat satisfied), followed by provide paramedic and emergency medical services (92%), maintain sewer and storm drain systems (83%), maintain parks, sports fields, and recreation facilities (83%), and provide police services (82%).

SPENDING PRIORITIES

- Among 11 services and projects tested, repairing aging sewer pipes and storm drains was assigned the highest priority for future city spending (93% high or medium priority), followed by improving the maintenance and repair of city streets and sidewalks (93%), addressing homelessness (90%), and making street, intersection, and signal improvements to reduce traffic congestion (79%).
- Building an indoor soccer facility (17%), building an Aquatics Center and competitive swimming facility (26%), and expanding and improving Grape Day Park (44%) were generally considered lower priorities.

LOCAL GOVERNANCE & CUSTOMER SERVICE

- Among those with an opinion, agreement was highest for the statement *I trust the City of Escondido* (68% strongly or somewhat agree), followed by *the City is responsive to residents' needs* (60%), *the City manages its finances well* (59%), and *the City listens to residents when making important decisions* (56%).
- Overall, 18% of respondents described themselves as being very attentive to matters of city government, 48% somewhat attentive, and 29% slightly attentive. Another 5% of respondents confided they do not pay any attention to the activities of their city government and 1% were unsure or declined to state
- Approximately one-third (34%) of respondents indicated that they had contacted Escondido city staff at least once during the 12 months prior to the interview.
- Respondents generally provided high ratings for city staff, with approximately nine-in-ten describing staff as professional (92%) and accessible (89%), and better than eight-in-ten describing staff as helpful (85%).

SALES TAX

- When asked whether they would support a one cent sales tax increase to fund general city services including police patrols, gang, drug and crime prevention, fire protection, paramedic, and 911 emergency response, street maintenance, pothole repair, addressing homelessness, graffiti removal, park maintenance, and library services, 71% of residents indicated that they would support the proposed measure, whereas 20% stated that they would oppose the measure and approximately 9% were unsure or unwilling to share their vote choice.

CANNABIS

- Overall, 49% of respondents indicated that the City of Escondido should allow cannabis businesses to operate in the City, 35% opposed the idea, and 16% were unsure or unwilling to state.
- When asked about different *types* of cannabis businesses that could be allowed, a majority of all respondents were in favor of allowing medicinal retail cannabis dispensaries to operate in the City (66%), research and testing of cannabis products (58%), and businesses that deliver cannabis to private residences (51%).
- There was less support found for the manufacture of cannabis products including edibles (46%), recreational retail cannabis dispensaries (44%), and indoor commercial cultivation of cannabis (42%), although it is worth noting that even for these categories of businesses support exceeded opposition, as a significant percentage of respondents indicated they were unsure.

COMMUNICATIONS

- Fifty-eight percent (58%) of respondents indicated they were satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means. The remaining respondents were either dissatisfied with the City's efforts in this respect (32%) or unsure of their opinion (10%).
- Respondents cited email and electronic newsletters as the most effective method for the City to communicate with them (87% very or somewhat effective), followed by the City's website (77%), and social media sites like Facebook, Twitter, and Next Door (76%). Approximately two-thirds of respondents also rated text messages (71%), postcards, letters and newsletters mailed to their home (71%), a smart phone app (68%), and townhall meetings (68%) as effective ways for the City to communicate with them.

COVID & THE ECONOMY

- When asked about their expectations for the economy six months into the future, Escondido residents expressed an even mix of optimism and pessimism, with 37% anticipating the economy will be better than today, 33% expecting it to be worse than today, and 27% indicating it will be about the same as today.
- Nearly one-third of respondents (32%) reported that they and/or another member of their household had been laid off from their job during the two months prior to the survey.
- Residents in Escondido expressed considerable concern when it comes to the coronavirus, with a majority indicating they are either extremely (27%) or somewhat (30%) concerned about COVID-19. The remainder were either somewhat (21%), slightly (12%), or not at all concerned (10%).
- Approximately one-in-five respondents (18%) indicated they or someone they know has been hospitalized due to COVID-19.



CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide the City of Escondido with a statistically reliable understanding of its residents' opinions, satisfaction, and priorities as they relate to services and facilities provided by the City. 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 results of the survey answer some of the 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 Escondido residents?

Escondido residents are generally satisfied with the City's efforts to provide municipal services and facilities, as well as the quality of life in the City.

Nearly three-quarters of Escondido residents (73%) indicated they were satisfied with the City's overall efforts to provide municipal services, whereas 20% were dissatisfied and the remaining 8% were unsure or did not provide a response. The solid level of satisfaction expressed with the City's performance *in general* was also mirrored in residents' assessments of the City's performance in providing most specific services, with the highest satisfaction scores assigned to the City's efforts to provide fire protection and prevention services, provide paramedic and emergency medical services, maintain sewer and storm drain systems, maintain parks, sports fields, and recreation facilities, and provide police services (see *Specific Services* on page 15).

Contributing to the positive ratings the City receives for specific service areas is the day-to-day customer service provided by city staff. Indeed, the staff at the City of Escondido 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. Approximately one-third (34%) of respondents indicated that they had personally contacted Escondido staff at least once during the 12 months prior to the interview, with approximately nine-in-ten describing staff as professional (92%) and accessible (89%), and better than eight-in-ten describing staff as helpful (85%).

The City's performance in providing municipal services has also contributed to a high quality of life for residents. Approximately two-thirds of residents surveyed rated the overall quality of life in Escondido as excellent or good. When asked in an open-ended manner to describe the things they value most about living in Escondido that they would like to preserve in the future, parks and recreation facilities/opportunities was at the top of the list, followed by the downtown area/Grand Avenue, diversity of businesses, culture and activities, small town feel to the city, the shopping and dining opportunities in Escondido, and open space/

green spaces (see *What Do You Like Most About Living in Escondido?* on page 10).

Where should the City focus its efforts in the future?

In addition to measuring the City's current performance, a primary 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 residents are generally satisfied with the City's performance, 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 city government could do to make Escondido a better place to live (see *What Should Be Changed?* on page 11), the list of services and their respective priority status for future attention (see *Performance Needs & Priorities* on page 18), and the manner in which residents prioritize among potential funding areas (see *Spending Priorities* on page 21), the top candidates are: improving public safety/reducing crime and gang activity, addressing homelessness, maintaining streets, roads and infrastructure, and economic development to attract businesses and good paying jobs to the City.

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 address homelessness. 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.

Do residents support allowing cannabis businesses in Escondido?

Under California law, it is legal for adults to use cannabis for medical and recreational purposes. The law also allows local cities like Escondido to decide whether to allow cannabis businesses to operate within their boundaries, as well as the types of restrictions and regulations to place on cannabis businesses. Although Escondido does not currently allow cannabis-related businesses to operate in the City, it took the opportunity in this survey to explore residents' opinions on the topic.

The survey results indicate that Escondido residents have mixed opinions regarding cannabis businesses, although they lean in supportive direction. When asked bluntly whether the City of Escondido should allow cannabis businesses to operate in the city, nearly half (49%) were in support of this change, 35% opposed the idea, and 16% were unsure or unwilling to state their opinion. Consistent with research True North has

conducted in other communities, the survey also found that opinions regarding cannabis businesses vary based on the *type* of business being considered (cultivation, manufacturing, research and testing, distribution, and delivery), as well as the intended *use* of the product. A majority of all respondents were in favor of allowing medicinal retail cannabis dispensaries to operate in the City (66%), research and testing of cannabis products (58%), and businesses that deliver cannabis to private residences (51%). There was less support found for the manufacture of cannabis products including edibles (46%), recreational retail cannabis dispensaries (44%), and indoor commercial cultivation of cannabis (42%), although it is worth noting that even for these categories of businesses support exceeded opposition, as a significant percentage of respondents indicated they were unsure.

How well is the City communicating with Escondido residents?

The public's preferences for communication are growing increasingly diverse. Whereas older residents continue to rely on newsletters and printed forms of communication, younger residents generally show great interest in digital forms of communication including social media, text, and smart phone apps. This pattern makes the challenge of city-resident communication more difficult than in the past, when the sources residents relied on for information were fewer and more consistent across subgroups. In turn, satisfaction with public agency communications has generally declined over the past eight years.

Against this backdrop of declining satisfaction with public agency communications *in general*, the survey results suggest the City of Escondido is doing a solid job communicating with its residents. Approximately six-in-ten respondents said they were satisfied with the City's efforts to communicate through newsletters, the Internet, social media, and other means.

Looking to the future, there are a variety of communication methods that residents generally viewed as being effective ways for the City to communicate with them (see *Communication Preferences* on page 34), with the most effective being email and e-Newsletters, the City's website, and social media like Facebook, Twitter, and Next Door. Although digital forms of communication were viewed as most effective and there is cost-savings to be had from relying *exclusively* on electronic communication channels, it is not a recommended practice. Prior research has shown that it will reduce readership and substantially lower residents' overall satisfaction with an agency's communication efforts. It also has a tendency to skew an agency's communication performance away from demographic subgroups that prefer traditional printed media (e.g., seniors). To the extent that the City can balance digital channels with traditional paper-based information sources like postcards and newsletters, it will optimize city-resident communication.

QUALITY OF LIFE

The opening series of questions in the survey was designed to assess residents’ top of mind perceptions about the quality of life in Escondido, what they would most like to preserve about the City, as well as ways to improve the quality of life in Escondido.

OVERALL QUALITY OF LIFE At the outset of the interview, respondents were asked to rate the City of Escondido on a number of key dimensions—including overall quality of life, as a place to raise a family, and as a place to work—using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 1 below, residents provided the most positive ratings for the overall quality of life in the City (65% excellent or good), followed by Escondido as a place to shop and dine (52%), as a place to raise a family (47%), and as a place to play and recreate (45%). When compared to the other dimensions tested, residents provided softer ratings to Escondido as a place to retire (42%) and a place to work (38%).

Question 2 *How would you rate: _____? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 1 RATING CITY OF ESCONDIDO



For the interested reader, tables 1-3 show how the percentage of respondents who rated each dimension as excellent or good varied by years in Escondido, gender, presence of a child in the home, presence of a senior in the home, home ownership, Council District, and respondent age. Although ratings varied by subgroup, it is worth noting that seniors were consistently the most positive in their ratings of the City of Escondido on each dimension tested.

TABLE 1 RATING CITY OF ESCONDIDO BY YEARS IN ESCONDIDO, GENDER & CHILD IN HSLD (SHOWING % EXCELLENT & GOOD)

	Years in Escondido (Q1)				Gender (QD2)		Child in HslD (QD3)	
	Less than 5	5 to 9	10 to 14	15 or more	Male	Female	Yes	No
The overall quality of life in the City	64.0	67.5	67.7	64.1	66.3	64.9	58.7	69.1
Escondido as a place to shop and dine	50.5	53.6	56.4	52.1	50.1	55.2	52.1	53.4
Escondido as a place to raise a family	37.3	46.9	51.9	49.1	49.1	46.0	47.6	47.3
Escondido as a place to play and recreate	41.7	46.4	46.8	45.0	45.3	45.2	43.2	46.6
Escondido as a place to retire	36.8	45.4	44.0	43.0	44.4	41.5	32.3	48.7
Escondido as a place to work	25.2	35.7	40.3	41.4	36.6	38.7	38.0	37.9

TABLE 2 RATING CITY OF ESCONDIDO BY ADULT OVER 65 IN HSLD, HOME OWNERSHIP STATUS & COUNCIL DISTRICT (SHOWING % EXCELLENT & GOOD)

	Adult Over 65 in Hslld (QD4)		Home Ownership Status (QD5)		Council District (QS1)			
	Yes	No	Rent	Own	One	Two	Three	Four
The overall quality of life in the City	71.9	61.9	70.2	58.6	53.4	67.9	70.2	67.6
Escondido as a place to shop and dine	55.0	51.8	49.3	56.5	57.2	48.7	52.1	51.4
Escondido as a place to raise a family	50.0	46.2	50.3	42.3	44.0	44.5	50.1	48.4
Escondido as a place to play and recreate	50.5	42.5	48.1	41.7	41.5	42.1	47.0	48.3
Escondido as a place to retire	55.0	36.7	45.9	37.5	36.7	44.3	40.6	47.4
Escondido as a place to work	41.7	35.9	35.6	39.0	41.7	34.9	35.0	38.3

TABLE 3 RATING CITY OF ESCONDIDO BY AGE (SHOWING % EXCELLENT & GOOD)

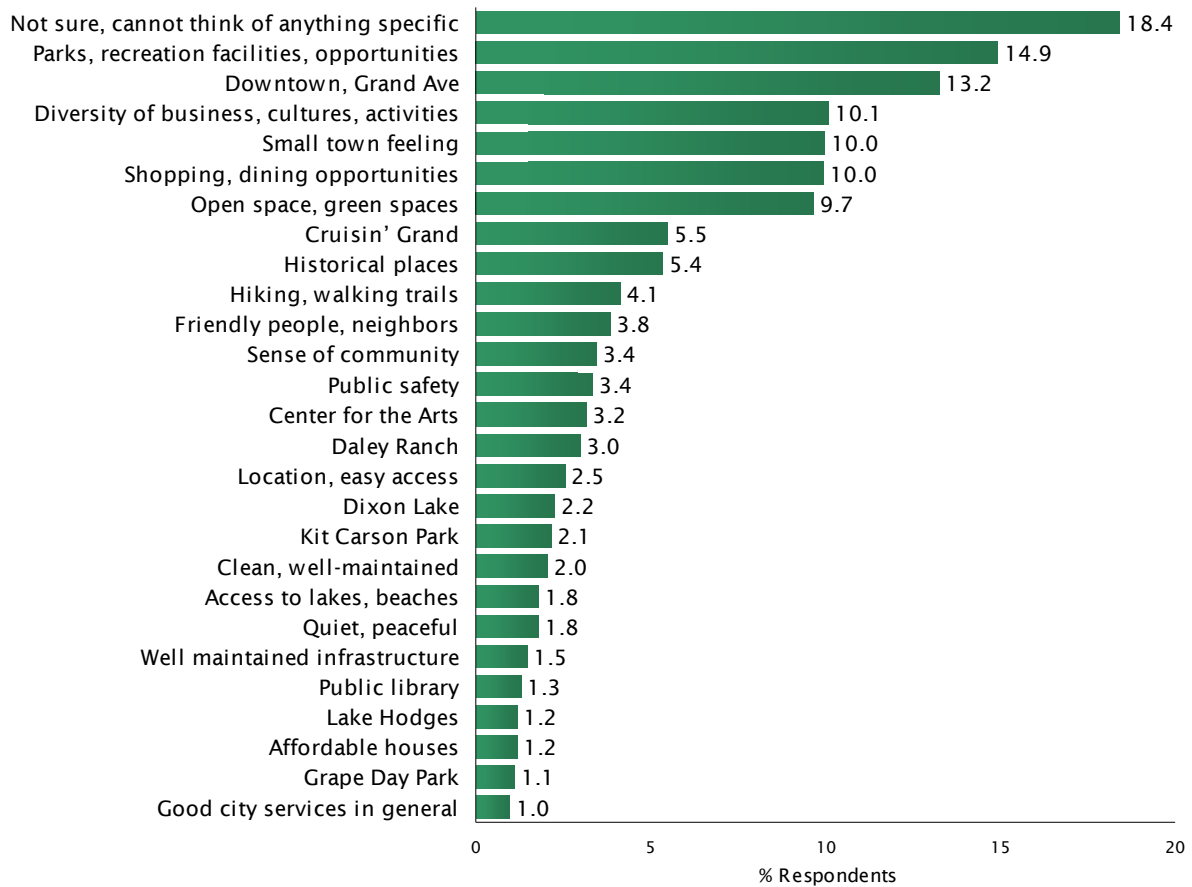
	Age (QD1)					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
The overall quality of life in the City	69.1	58.8	63.1	65.4	67.6	81.7
Escondido as a place to shop and dine	53.4	45.7	51.7	50.1	52.6	60.8
Escondido as a place to raise a family	47.3	39.7	47.9	47.6	45.1	58.1
Escondido as a place to play and recreate	46.6	40.1	42.6	46.0	49.0	54.4
Escondido as a place to retire	48.7	29.4	31.5	42.4	43.4	69.3
Escondido as a place to work	37.9	34.6	36.3	39.5	36.9	42.8

WHAT DO YOU LIKE MOST ABOUT LIVING IN ESCONDIDO? The next question in this series asked residents to identify what they like most about living in the City of Escondido that should be preserved in the future. Question 3 was posed in an open-ended manner, thereby allowing residents to mention any aspect or attribute that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 2 on the next page.

Approximately one-in-five respondents (18%) were not sure what they like best about living in Escondido. Among the specific aspects that were mentioned, residents were most apt to cite the parks and recreation facilities/opportunities in Escondido (15%), the downtown area/Grand Avenue (13%), diversity of businesses, culture and activities (10%), small town feeling (10%), the shopping and dining opportunities in Escondido (10%), and open space/green spaces in the City (10%).

Question 3 *What do you like most about the City of Escondido that should be preserved in the future?*

FIGURE 2 LIKE MOST ABOUT CITY

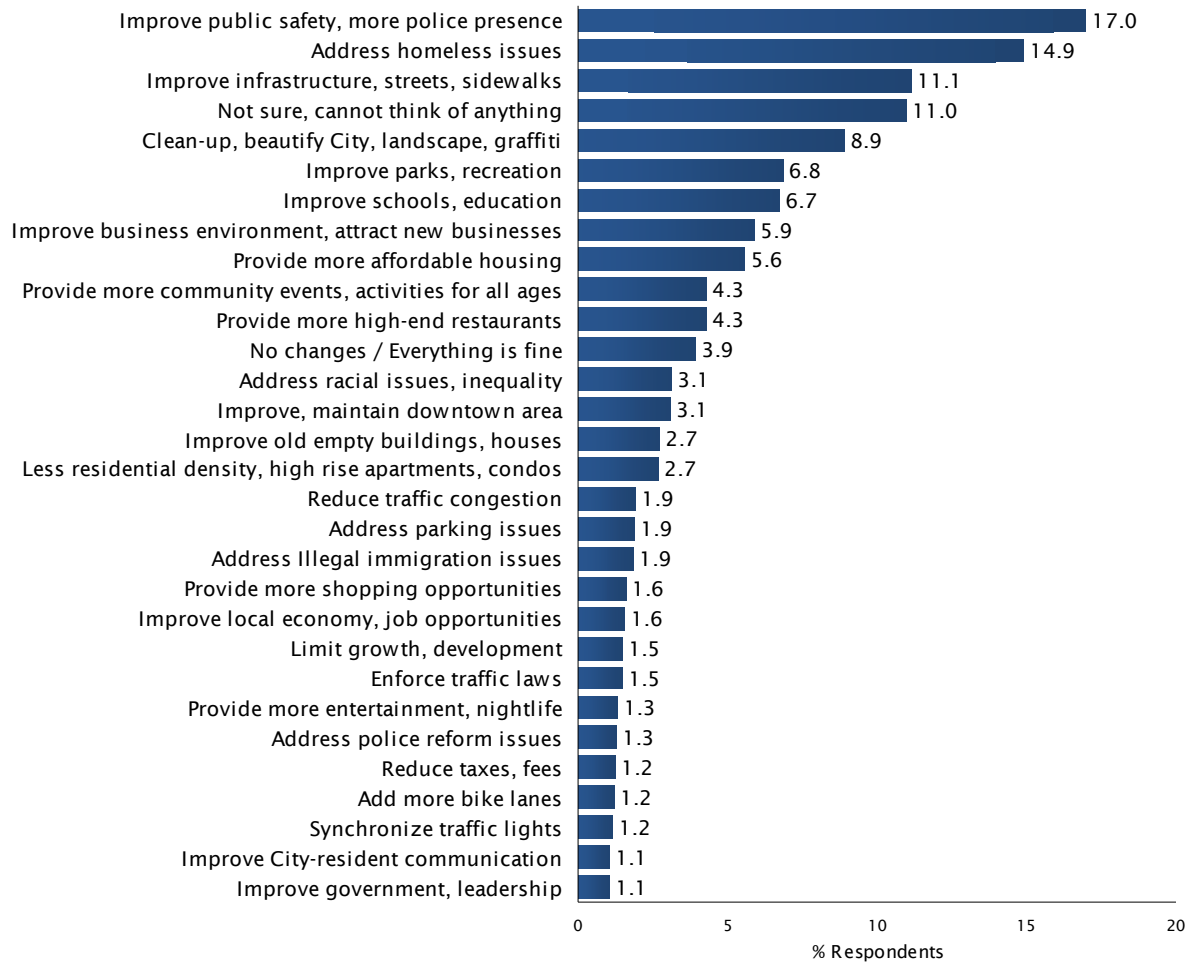


WHAT SHOULD BE CHANGED? In an open-ended manner similar to that described above for Question 3, all respondents were also asked to indicate the one thing that the City government could *change* to make Escondido a better place to live. True North reviewed the verbatim responses to Question 4 and grouped them into the categories shown in Figure 3 on the next page.

Approximately 15% could not think of a change they desire (11%) or reported that no changes are needed/everything is fine (4%), both of which are indicative of a respondent who does not perceive any pressing issues or problems in the City. Among specific changes desired, the most common were improving public safety/more police presence (17%), addressing homeless issues (15%), improving infrastructure, streets and/or sidewalks (11%), cleaning-up/beautifying the City and landscape/removing graffiti (9%), and improving parks and recreation (7%).

Question 4 *If the city government could change one thing to make Escondido a better place to live now and in the future, what change would you like to see?*

FIGURE 3 CHANGES TO IMPROVE CITY



CITY SERVICES

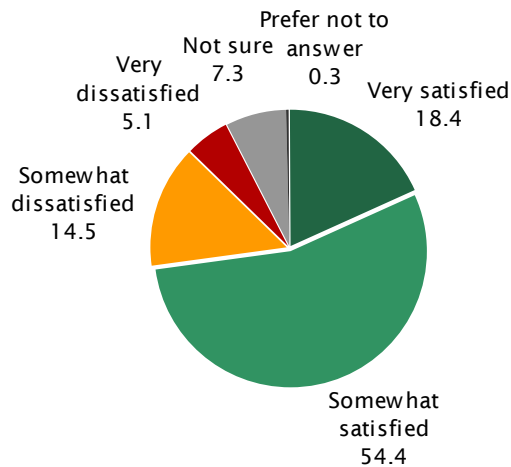
After measuring respondents' perceptions of the quality of life in Escondido, the survey next turned to assessing their opinions about the City's performance in providing various municipal services.

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 Escondido is doing to provide city 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 4, approximately three-quarters (73%) of Escondido residents indicated they were either very (18%) or somewhat (54%) satisfied with the City's efforts to provide municipal services. Approximately 20% were very or somewhat dissatisfied, whereas 8% were unsure or unwilling to share their opinion.

Question 5 *Generally speaking, are you satisfied or dissatisfied with the job the City of Escondido is doing to provide city services?*

FIGURE 4 OVERALL SATISFACTION



The next three figures display how residents' opinions about the City's overall performance in providing municipal services varied across subgroups of Escondido residents. The most striking pattern in the figures is that the high levels of satisfaction exhibited by respondents as a whole (see Figure 4 above) were generally echoed across resident subgroups, with satisfaction ranging from a low of 60% to a high of 86%. It is worth noting that satisfaction with the City's overall performance in providing services increased steadily with age, with seniors being the *most* satisfied of all identified subgroups.

FIGURE 5 OVERALL SATISFACTION BY YEARS IN ESCONDIDO, ATTENTIVENESS TO CITY GOVERNMENT & CHILD IN HSLD

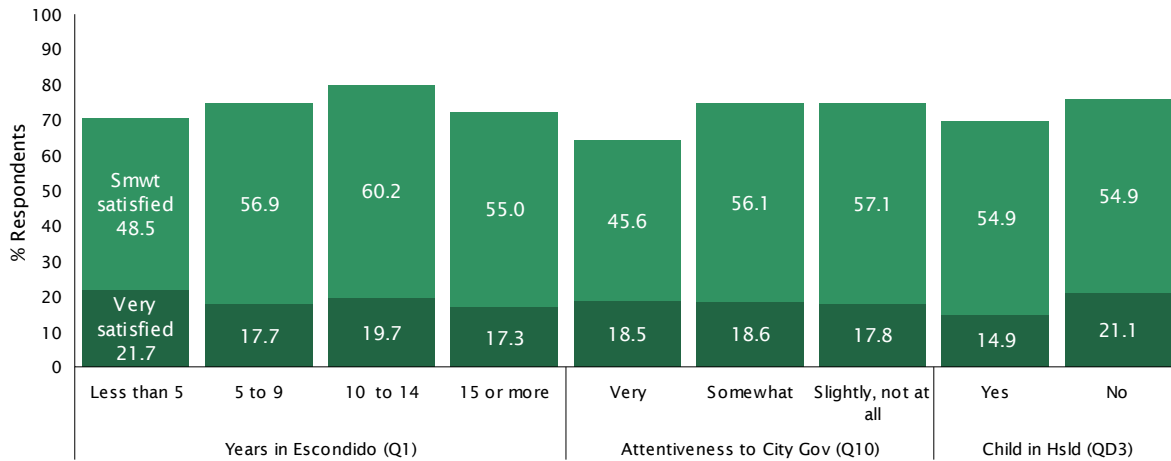


FIGURE 6 OVERALL SATISFACTION BY AGE, GENDER & HOME OWNERSHIP STATUS

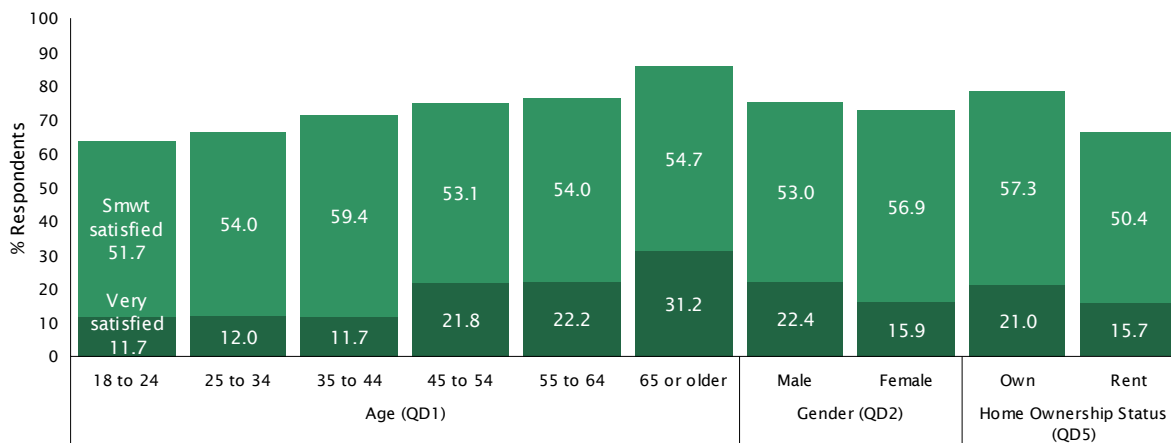
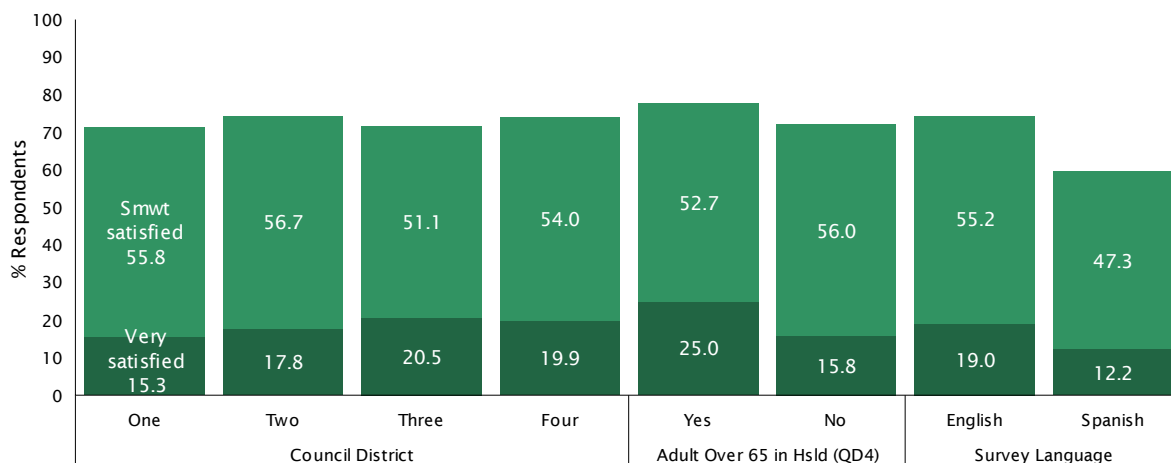


FIGURE 7 OVERALL SATISFACTION BY COUNCIL DISTRICT, ADULT OVER 65 IN HSLD & SURVEY LANGUAGE

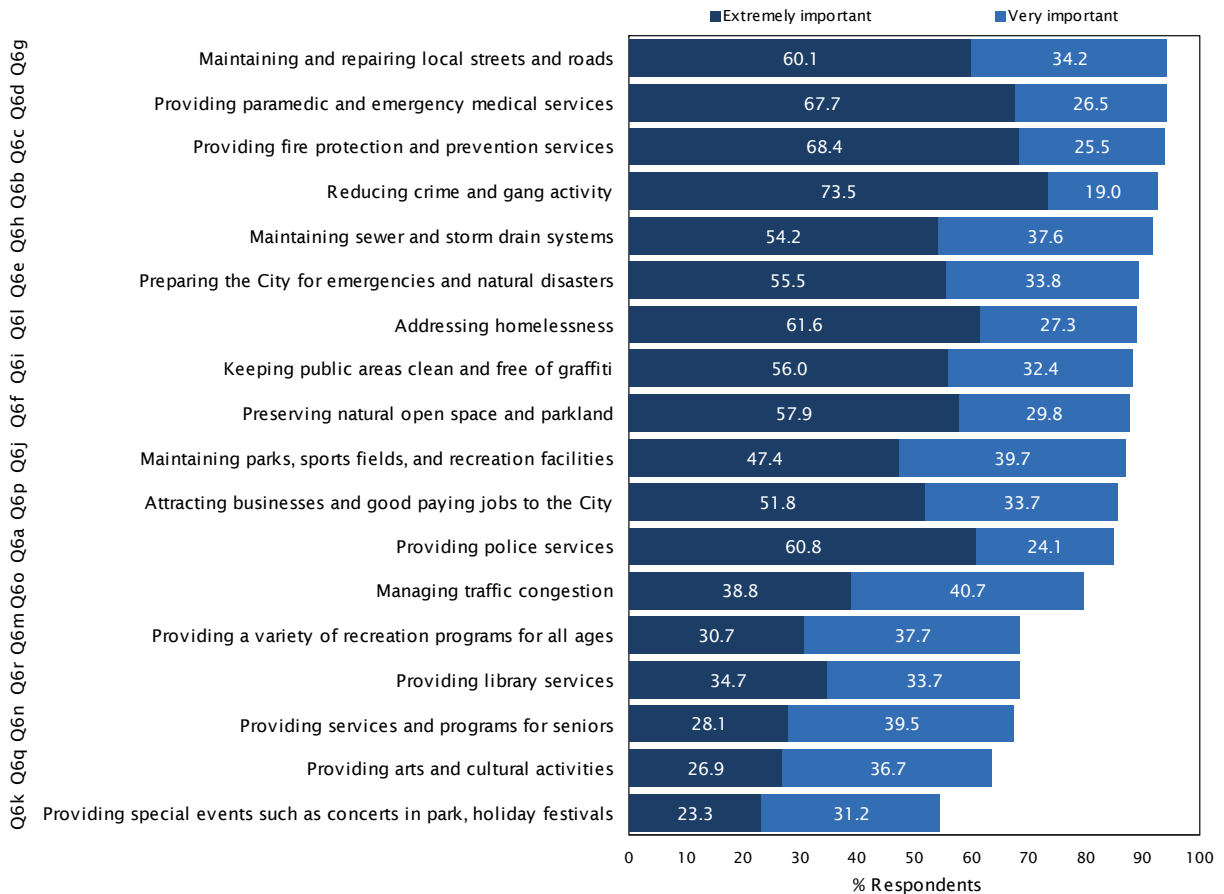


SPECIFIC SERVICES Whereas Question 5 addressed the City’s *overall* performance, the next series of questions asked respondents to rate the importance of *specific* services offered by the City, as well as their level of satisfaction with efforts to provide these services. For each service, respondents were first asked whether they thought a service was extremely important, very important, somewhat important, or not at all important. Respondents were then asked about their level of satisfaction with these same services. The order of the items was randomized for each respondent to avoid a systematic position bias.

Figure 8 presents the services in rank order of importance according to the proportion of respondents who rated a service as *at least* very important. In general, Escondido residents rated public safety and public works as the most important. More specifically, maintaining and repairing local streets and roads (94% extremely or very important), providing paramedic and emergency medical services (94%), providing fire protection and prevention services (94%), reducing crime and gang activity (93%), maintaining sewer and storm drain systems (92%), and preparing the City for emergencies and natural disasters (89%) received the highest importance ratings from residents.

Question 6 *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



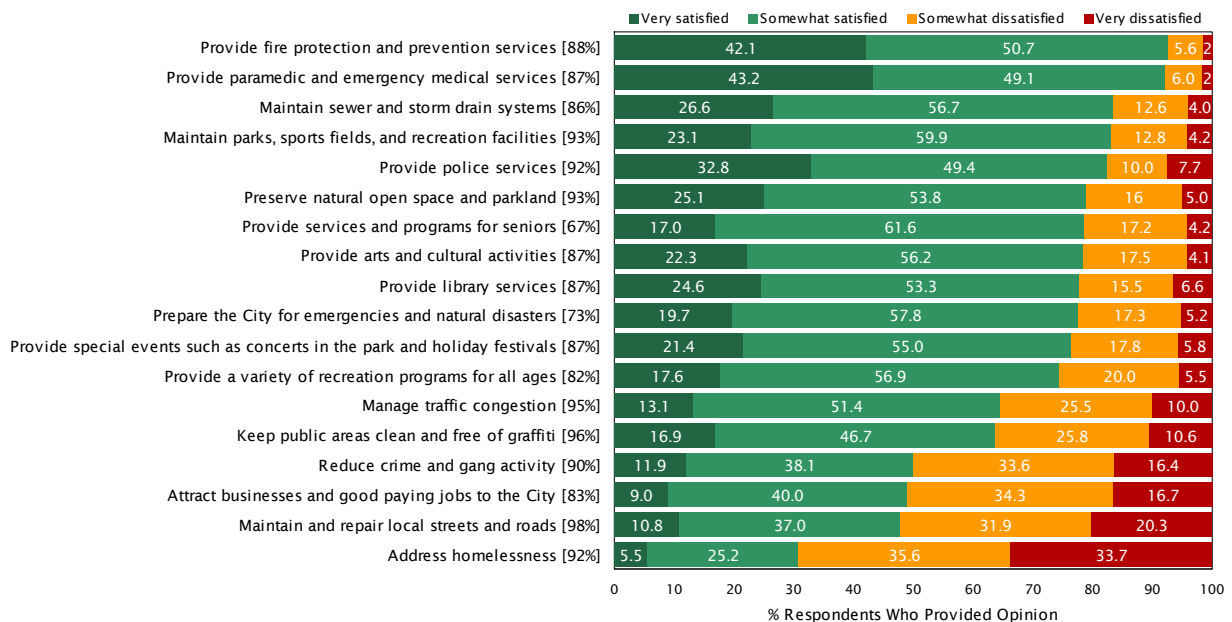
At the other end of the spectrum, providing special events such as concerts in the park and holiday celebrations (55%) and providing arts and cultural activities (64%) were viewed as somewhat less important.

Turning to the satisfaction component, Figure 9 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 fire protection and prevention services (93% very or somewhat satisfied), followed by provide paramedic and emergency medical services (92%), maintain sewer and storm drain systems (83%), maintain parks, sports fields, and recreation facilities (83%), and provide police services (82%). Respondents were notably less satisfied with the City's efforts to address homelessness (31%), maintain and repair local streets and roads (48%), attract businesses and good paying jobs to the City (49%), and reduce crime and gang activity (50%).

Question 7 *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



DIFFERENTIATORS OF OPINION For the interested reader, Table 3 displays how the level of satisfaction with each specific service tested in Question 7 varied according to residents’ overall performance ratings for the City (see *Overall Satisfaction* on page 13). 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 7 (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 to their counterparts, those who were satisfied with the City’s *overall* performance in providing city services were also more likely to express satisfaction with the City’s efforts to provide each of the services tested in Question 7. That said, the greatest specific differentiators of opinion between satisfied and dissatisfied residents were found with respect to the City’s efforts to provide a variety of recreation programs for all ages, maintain and repair local streets and roads, provide police services, manage traffic congestion, and provide services and programs for seniors.

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 fire protection and prevention services and address homelessness.

TABLE 4 SATISFACTION WITH SERVICES BY OVERALL SATISFACTION

		Satisfaction With City’s Overall Performance (Q5)		Difference Between Groups For Each Service
		Very or somewhat satisfied	Very or somewhat dissatisfied	
% Respondents Satisfied With Each Service	Provide a variety of recreation programs for all ages	81.8	48.4	33.3
	Maintain and repair local streets and roads	54.5	25.0	29.6
	Provide police services	89.2	60.0	29.2
	Manage traffic congestion	71.5	43.0	28.4
	Provide services and programs for seniors	86.4	58.1	28.3
	Keep public areas clean and free of graffiti	70.3	42.2	28.1
	Reduce crime and gang activity	57.2	29.3	27.9
	Attract businesses and good paying jobs to the City	56.0	28.2	27.8
	Prepare the City for emergencies and natural disasters	84.6	58.8	25.8
	Provide arts and cultural activities	84.1	59.8	24.4
	Provide special events such as concerts in the park and holiday festivals	82.0	57.6	24.4
	Maintain parks, sports fields, and recreation facilities	88.5	64.3	24.2
	Preserve natural open space and parkland	84.4	61.1	23.3
	Provide library services	83.4	62.0	21.5
	Provide paramedic and emergency medical services	96.5	76.9	19.5
	Maintain sewer and storm drain systems	87.7	68.3	19.3
	Address homelessness	35.9	17.6	18.3
	Provide fire protection and prevention services	96.4	81.8	14.6



PERFORMANCE NEEDS & PRIORITIES

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

Rather than rely on *averages* to conduct this analysis, True North has developed an *individualized* approach to identifying priorities. This approach is built on the recognition that opinions will vary from resident to resident and that understanding this variation is required for assessing how well the City is meeting residents' needs.² Table 4 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:

<i>Exceeding Needs</i>	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.
<i>Meeting Needs, Moderately</i>	The City is moderately meeting a respondent's needs if the respondent is satisfied and the level of satisfaction is commensurate with the level of importance assigned to the service.
<i>Meeting Needs, Marginally</i>	The City is marginally meeting a respondent's needs if the respondent is satisfied with the City's efforts to provide the service, but their level of satisfaction is lower than the level of importance assigned to the service.
<i>Not Meeting Needs, Marginally</i>	The City is marginally <i>not</i> meeting a respondent's needs if the respondent is somewhat dissatisfied, but the service is also viewed as just somewhat or not at all important.
<i>Not Meeting Needs, Moderately</i>	The City is moderately <i>not</i> meeting a respondent's needs if A) a respondent is very dissatisfied with the City's efforts to provide the service, but the service is viewed somewhat or not at all important, or B) a respondent is somewhat dissatisfied and the service is very important.
<i>Not Meeting Needs, Severely</i>	The City is severely <i>not</i> meeting a respondent's needs if A) a respondent is dissatisfied and the service is viewed as extremely important, or B) a respondent is very dissatisfied and the service is viewed as very important.

2. 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

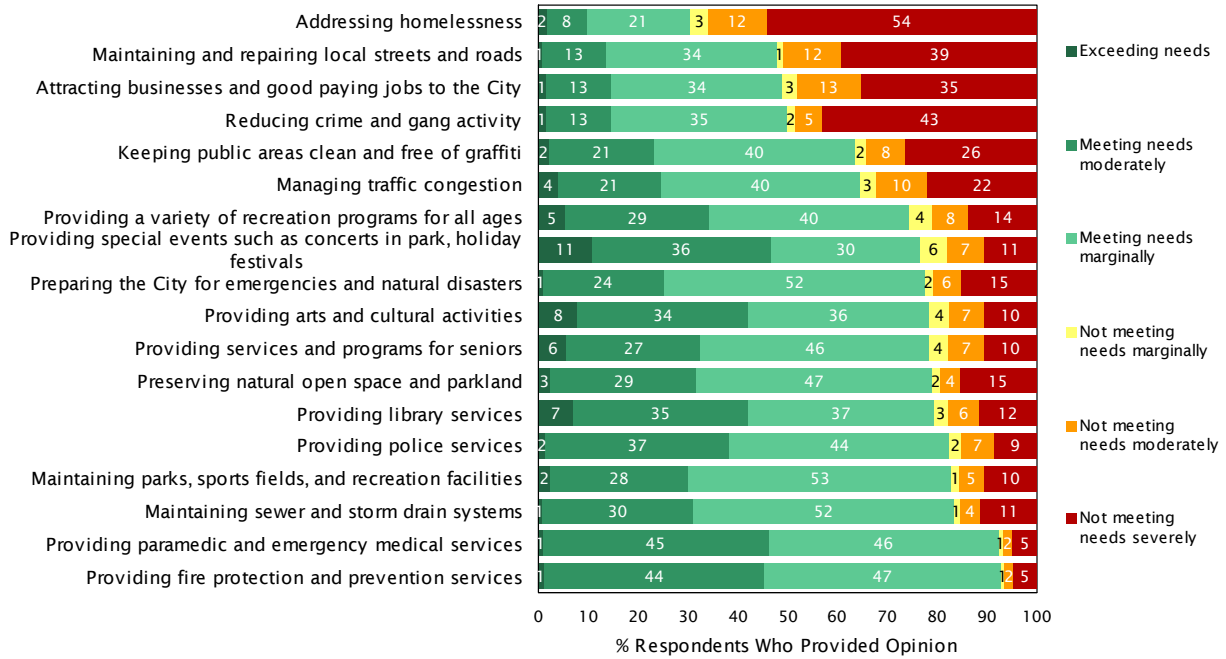
		Importance			
		Not at all important	Somewhat important	Very important	Extremely important
Satisfaction	Very satisfied	Exceeding needs	Exceeding needs	Meeting needs	Meeting needs
	Somewhat satisfied	Exceeding needs	Meeting needs	Meeting needs, moderately	Meeting needs, moderately
	Somewhat dissatisfied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

Using this framework, True North categorized respondents individually for each of the 18 services tested in the study. Thus, for example, a respondent who indicated that addressing homelessness 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., managing traffic congestion) 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 presents the 18 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 addressing homelessness, the City is exceeding the needs of 2% of respondents, moderately meeting the needs of 8% of respondents, marginally meeting the needs of 21% of respondents, marginally not meeting the needs of 3% of respondents, moderately not meeting the needs of 12% of respondents, and severely not meeting the needs of 54% of respondents.

As shown in the figure, the City is meeting the needs of at least three-quarters of residents for most of the 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, addressing homelessness is the top priority, followed by maintaining and repairing local streets and roads, attracting businesses and good paying jobs to the City, and reducing crime and gang activity.

FIGURE 10 RESIDENT SERVICE NEEDS



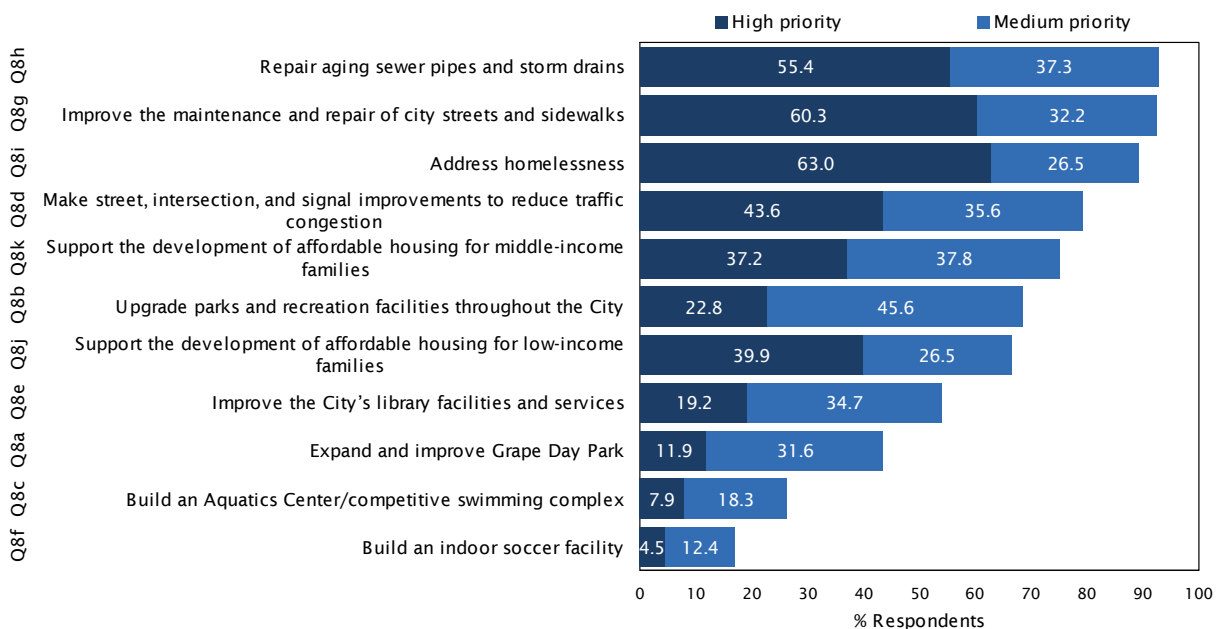
SPENDING PRIORITIES

It is often the case that residents’ desires for public facilities and programs exceed a city’s financial resources. In such cases, a city must prioritize projects and programs based upon a variety of factors, including the preferences and needs of residents.

FUNDING PRIORITIES Question 8 was designed to provide Escondido with a reliable measure of how residents, as a whole, prioritize a variety of services and projects to which the City could allocate resources in the future. The format of the question was straightforward: after informing respondents that the City does not have the financial resources to fund *all* of the services and projects that may be desired by residents, respondents were asked whether each service or project shown in Figure 11 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 services and projects could be high priorities.

Question 8 *The City of Escondido has limited financial resources to provide the services and projects desired by residents. Because it can't fund every service 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 11 SPENDING PRIORITIES



The 11 services and projects are sorted in Figure 11 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 services and projects tested, repairing aging sewer pipes and storm drains was assigned the highest priority (93% high or medium priority), followed by improving the maintenance and repair of city streets and sidewalks (93%), addressing homelessness (90%), and mak-

ing street, intersection, and signal improvements to reduce traffic congestion (79%). Building an indoor soccer facility (17%), building an Aquatics Center and competitive swimming facility (26%), and expanding and improving Grape Day Park (44%) were generally considered lower priorities.

For the interested reader, the following two tables provide the percentage of respondents who considered each proposed service or project a *high priority* by their overall satisfaction with the City’s performance in providing municipal services, age, presence of a child in the home, presence of a senior in the home, and Council District (top three highest priorities highlighted green). It is striking that the top three projects and services were the same for all subgroups with the exception of those under 35 years of age.

TABLE 6 SPENDING PRIORITIES BY OVERALL SATISFACTION & AGE (SHOWING % HIGH PRIORITY)

	Overall Satisfaction (Q5)		Age (QD1)					
	Satisfied	Dissatisfied	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
Address homelessness	59.7	70.6	72.0	69.9	65.7	60.3	58.0	53.9
Improve the maintenance and repair of city streets and sidewalks	58.8	66.1	69.4	54.6	55.7	59.0	59.2	65.0
Repair aging sewer pipes and storm drains	56.3	53.2	54.7	53.6	45.0	54.3	59.8	63.7
Make street, intersection, and signal improvements to reduce traffic congestion	42.2	52.7	39.3	43.5	39.1	44.7	46.6	46.0
Support the development of affordable housing for low-income families	37.8	43.4	72.3	54.0	33.4	28.3	27.2	26.9
Support the development of affordable housing for middle-income families	36.4	38.2	41.4	43.9	41.2	36.6	32.8	29.0
Upgrade parks and recreation facilities throughout the City	20.0	31.7	28.2	26.0	30.9	25.0	13.6	15.0
Improve the City’s library facilities and services	17.5	22.9	29.4	26.1	20.3	13.0	10.4	14.9
Expand and improve Grape Day Park	11.2	14.4	14.3	15.4	17.1	11.7	6.6	6.7
Build an Aquatics Center/competitive swimming complex	7.6	10.3	3.8	10.4	14.1	7.9	6.2	4.0
Build an indoor soccer facility	4.5	5.9	3.8	6.8	6.2	5.2	2.9	1.5

TABLE 7 SPENDING PRIORITIES BY CHILD IN HSLD, ADULT OVER 65 IN HSLD & COUNCIL DISTRICT (SHOWING % HIGH PRIORITY)

	Child in HslD (QD3)		Adult Over 65 in HslD (QD4)		Council District (Q51)			
	Yes	No	Yes	No	One	Two	Three	Four
Address homelessness	67.0	60.7	58.2	65.7	68.7	59.1	63.7	60.3
Improve the maintenance and repair of city streets and sidewalks	58.3	60.9	64.9	57.4	66.0	55.2	60.5	59.5
Repair aging sewer pipes and storm drains	48.2	59.2	60.4	52.8	63.5	48.9	52.8	56.4
Make street, intersection, and signal improvements to reduce traffic congestion	42.7	44.2	47.2	41.8	47.2	45.4	42.8	39.0
Support the development of affordable housing for low-income families	41.6	38.5	33.8	43.2	56.4	28.1	43.9	31.5
Support the development of affordable housing for middle-income families	40.8	34.9	31.7	39.7	41.0	34.0	40.5	33.2
Upgrade parks and recreation facilities throughout the City	32.7	17.4	17.8	25.2	28.2	19.4	21.7	22.0
Improve the City’s library facilities and services	23.1	16.9	16.8	20.5	24.7	15.5	19.3	17.5
Expand and improve Grape Day Park	16.0	9.6	8.8	13.5	12.4	10.7	12.7	11.9
Build an Aquatics Center/competitive swimming complex	13.0	5.2	5.0	9.4	9.4	5.9	9.1	7.1
Build an indoor soccer facility	7.4	2.8	2.4	5.5	9.2	3.0	2.7	3.1

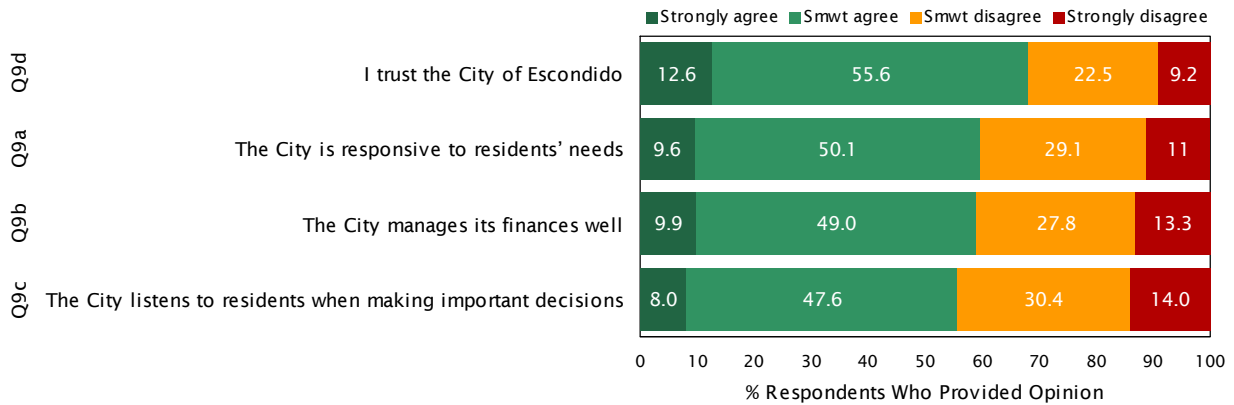
LOCAL GOVERNANCE & CUSTOMER SERVICE

Although much of the survey focused on residents' satisfaction with the City's efforts to provide specific services, as with other progressive cities Escondido recognizes there is more to good local governance than simply providing satisfactory services. How do residents view the customer service provided by city staff? Do residents perceive that the City listens to residents when making important decisions? Do residents feel that the City is doing a good job managing its finances? Answers to questions such as these are important in measuring the City's performance in meeting residents' needs. Accordingly, they were the focus of the next section of the interview.

LOCAL GOVERNANCE The first question in this series was designed to measure how residents perceive the City on topics such as trust, responsiveness, and fiscal accountability. The format of the question was straightforward: for each of the statements shown at the left of Figure 12, respondents were asked if they agreed or disagreed with the statement. Percentages shown in the figure are among those with an opinion.

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

FIGURE 12 AGREEMENT WITH STATEMENTS



Among those with an opinion, agreement was highest for the statement *I trust the City of Escondido* (68% strongly or somewhat agree), followed by *the City is responsive to residents' needs* (60%), *the City manages its finances well* (59%), and *the City listens to residents when making important decisions* (56%). Those who were generally satisfied with the City's overall performance in providing municipal services were also the most satisfied with each of the specific performance aspects tested in Question 9, as were adults over 34 years of age, those not living with a child in the home, those living in a household with at least one senior, and individuals who live in Council Districts 2, 3 or 4 (see tables 8 & 9 on the next page).

TABLE 8 AGREEMENT WITH STATEMENTS BY OVERALL SATISFACTION & AGE (SHOWING % STRONG & SOMEWHAT)

	Overall Satisfaction (Q5)		Age (QD1)					
	Satisfied	Dissatisfied	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
I trust the City of Escondido	78.9	30.4	54.5	59.0	74.9	73.5	70.9	78.6
The City is responsive to residents' needs	71.6	22.3	47.4	52.0	59.3	64.8	62.8	74.3
The City manages its finances well	72.8	18.8	42.7	46.5	59.7	63.7	64.6	76.0
The City listens to residents when making important decisions	67.0	18.4	45.0	51.0	53.5	62.8	57.2	65.8

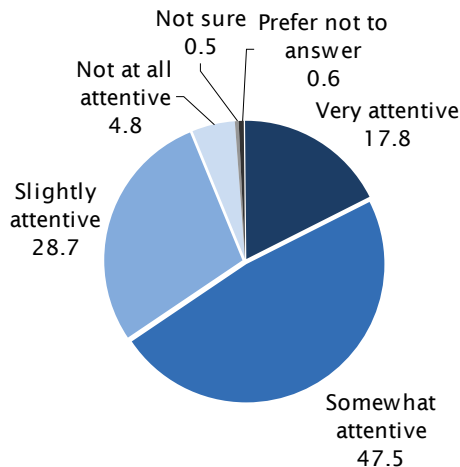
TABLE 9 AGREEMENT WITH STATEMENTS BY CHILD IN HSLD, ADULT OVER 65 IN HSLD & COUNCIL DISTRICT(SHOWING % STRONG & SOMEWHAT)

	Child in HslD (QD3)		Adult Over 65 in HslD (QD4)		Council District (Q51)			
	Yes	No	Yes	No	One	Two	Three	Four
I trust the City of Escondido	67.2	70.3	73.3	66.9	60.7	70.7	71.3	70.7
The City is responsive to residents' needs	56.3	62.8	64.8	58.3	52.9	63.8	60.3	62.5
The City manages its finances well	54.9	62.0	68.1	54.7	50.6	64.3	61.2	60.4
The City listens to residents when making important decisions	52.4	58.2	59.3	54.4	53.1	54.4	58.1	56.8

ATTENTION PAID TO CITY GOVERNMENT The next question in this section asked respondents to rate how attentive they are to the issues, decisions, and activities of city government using a scale of very attentive, somewhat attentive, slightly attentive, or not at all attentive. Overall, 18% of respondents claimed to be very attentive to matters of city government, 48% somewhat attentive, and 29% slightly attentive. Another 5% of respondents confided they do not pay any attention to the activities of their city government and 1% were unsure or declined to state (Figure 13).

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 13 ATTENTIVENESS TO CITY ISSUES, DECISION & ACTIVITIES



Figures 14 and 15 on the following page display how attentiveness to the activities of city government differed across a variety of demographics. In general, attention paid to city government shared a positive relationship with length of residence in Escondido, respondent age, home ownership, living with a senior, and taking the survey in Spanish. It is also worth noting that residents in Council District 1 were the most likely to report being at least somewhat attentive to the issues, decisions, and activities of city government.

FIGURE 14 ATTENTIVENESS TO CITY ISSUES, DECISION & ACTIVITIES BY YEARS IN ESCONDIDO, CHILD IN HSLD, GENDER, HOME OWNERSHIP STATUS & SURVEY LANGUAGE

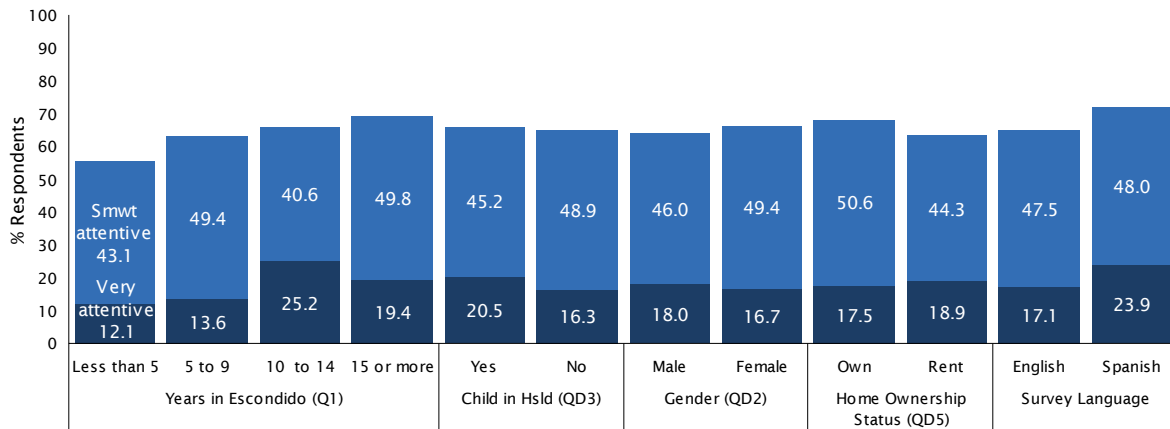
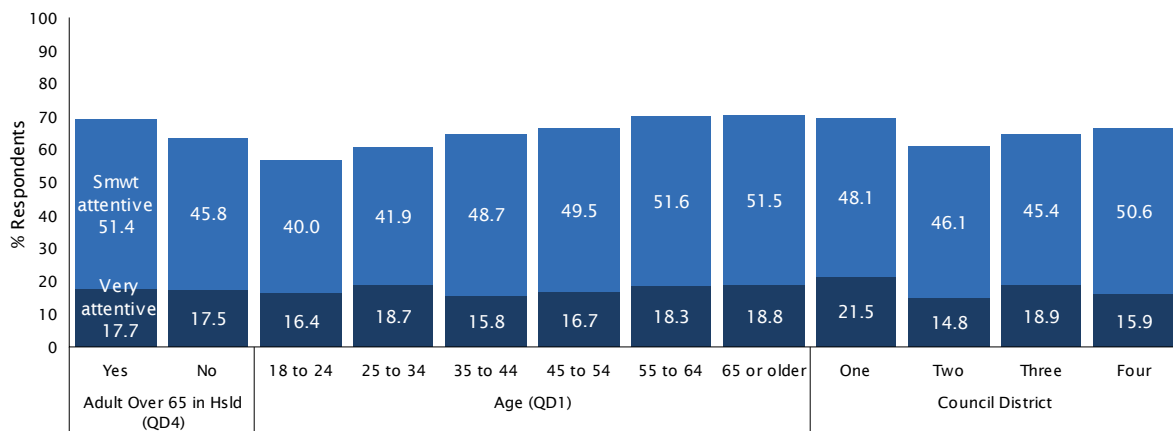


FIGURE 15 ATTENTIVENESS TO CITY ISSUES, DECISION & ACTIVITIES BY ADULT OVER 65 IN HSLD, AGE & COUNCIL DISTRICT



STAFF CONTACT The staff at the City of Escondido 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. Approximately one-third (34%) of respondents indicated that they had contacted Escondido staff at least once during the 12 months prior to the interview (see Figure 16 on the next page). Interaction with City staff was most commonly reported by residents over the age of 44, those residing in Council District 4, home owners, those with a senior in the home, and individuals who completed the survey in English (see figures 17 & 18).

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

FIGURE 16 CONTACT WITH CITY STAFF IN PAST 12 MONTHS

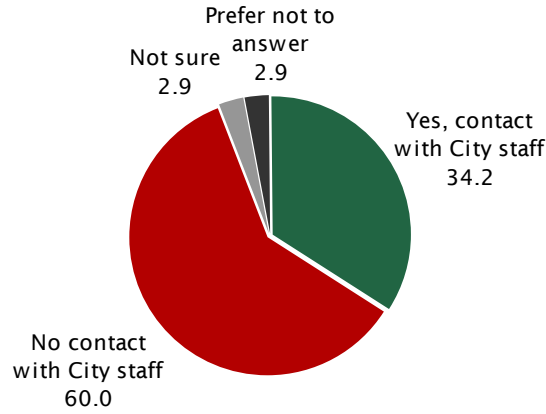


FIGURE 17 CONTACT WITH CITY STAFF IN PAST 12 MONTHS BY YEARS IN ESCONDIDO & AGE

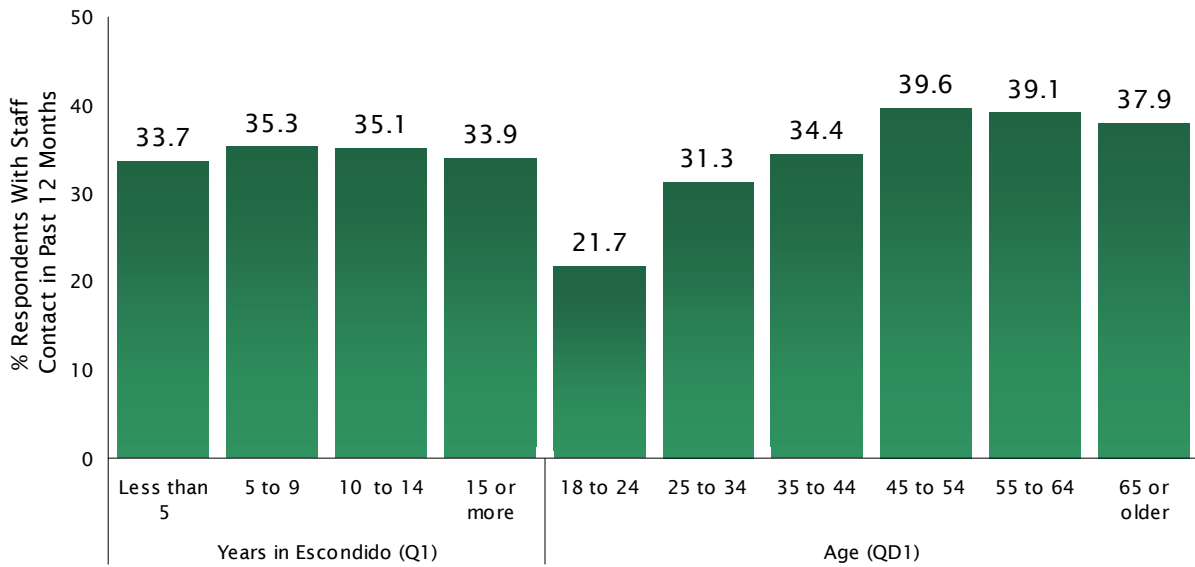
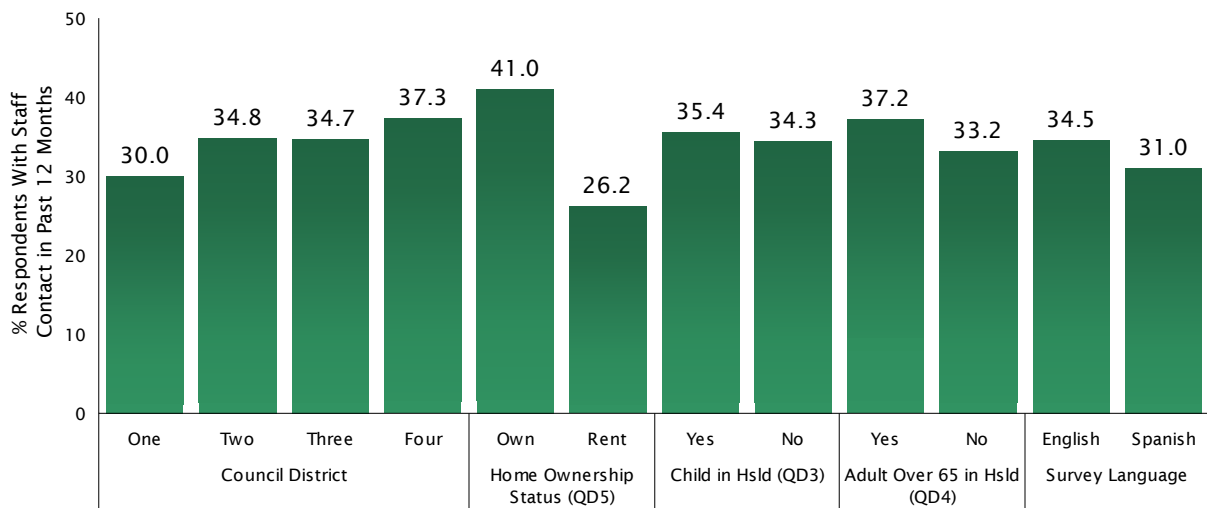


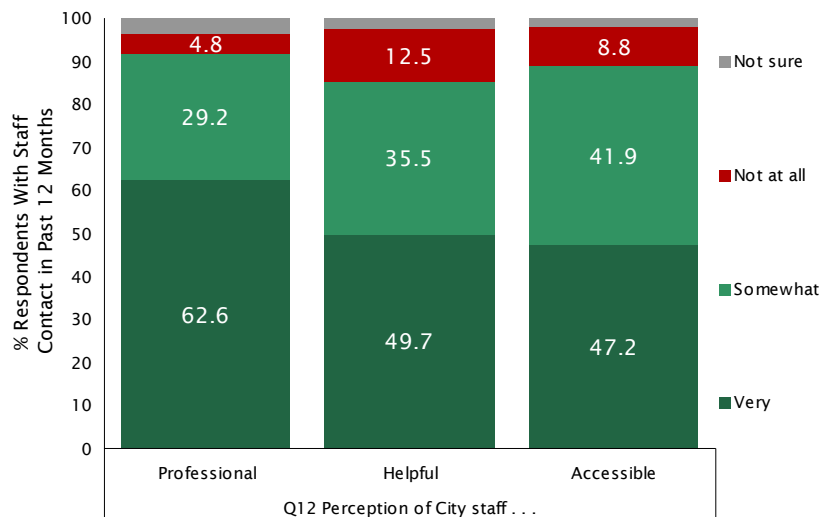
FIGURE 18 CONTACT WITH CITY STAFF IN PAST 12 MONTHS BY COUNCIL DISTRICT, HOME OWNERSHIP STATUS, CHILD IN HSLD, ADULT OVER 65 IN HSLD & SURVEY LANGUAGE



ASSESSMENT OF CITY STAFF The final question in this section asked residents with recent staff contact to rate city staff on three dimensions: helpfulness, professionalism, and accessibility. Respondents generally provided high ratings for city staff on all three dimensions (Figure 19), with approximately nine-in-ten describing staff as professional (92%) and accessible (89%), and better than eight-in-ten describing staff as helpful (85%).

Question 12 *In your opinion, was the staff at the City very _____, somewhat _____, or not at all _____.*

FIGURE 19 PERCEPTION OF CITY STAFF



SALES TAX

One objective of this survey was to estimate resident support for a one cent sales tax increase to fund general city services including police patrols, gang, drug and crime prevention, fire protection, paramedic, and 911 emergency response, street maintenance, pothole repair, addressing homelessness, graffiti removal, park maintenance, library and other city services. Although the City had previously conducted a more extensive Baseline Survey regarding a potential sales tax measure, that study was conducted prior to the coronavirus pandemic and associated economic recession. The current survey offered an opportunity to provide the City with up-to-date information this topic.

Question 13 *Later this year, voters in Escondido may be asked to vote on a local ballot measure. Let me read you a summary of the measure. To provide funding for general city services in the City of Escondido, including police patrols, gang, drug and crime prevention; fire protection, paramedic, and 9-1-1 emergency response; street maintenance, pothole repair; addressing homelessness; graffiti removal, park maintenance, library and other city services; shall an ordinance establishing a one-cent sales tax be adopted, providing approximately 25 million dollars annually for city services until ended by voters, with independent audits, citizen oversight, and all money locally controlled? If the election were held today, would you vote yes or no on this measure?*

FIGURE 20 SUPPORT FOR ONE-CENT SALES TAX

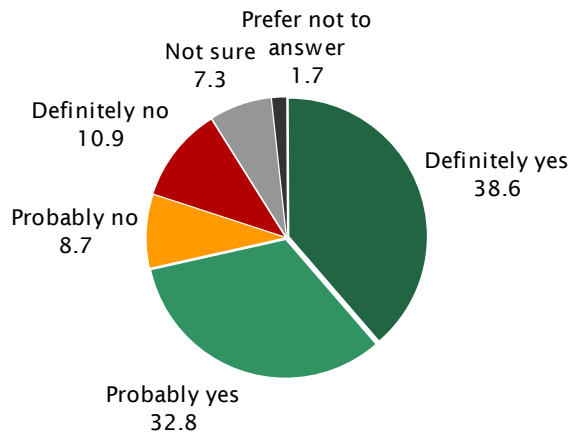


Figure 20 presents the results of the ballot test among all residents surveyed. Overall, 71% of residents indicated that they would support the proposed sales tax, whereas 20% stated that they would oppose the measure, and approximately 9% were unsure or unwilling to share their vote choice. For the interested reader, figures 21 and 22 on the next page display support for the proposed sales tax measure among a variety of resident subgroups. The most striking pattern is the *consistency* of support for the measure, with overall support ranging between 67% and 78% across all subgroups.

It is also worth noting that the level of support for the proposed sales tax recorded in this survey (71%) is nearly identical to that found in the Baseline Survey (70%) conducted in October 2019.

FIGURE 21 SUPPORT FOR ONE-CENT SALES TAX BY YEARS IN ESCONDIDO, HOME OWNERSHIP STATUS & SURVEY LANGUAGE

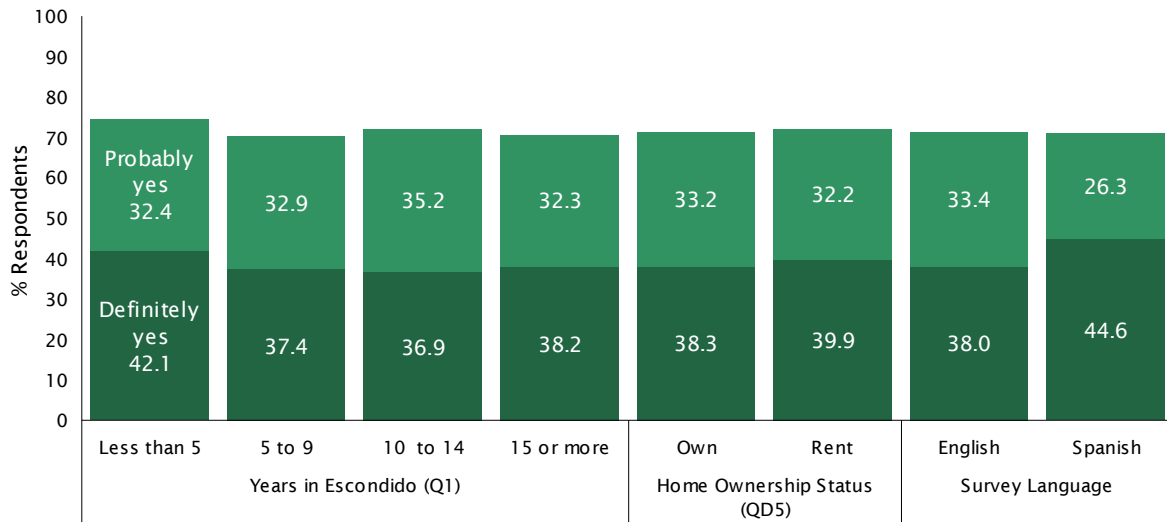
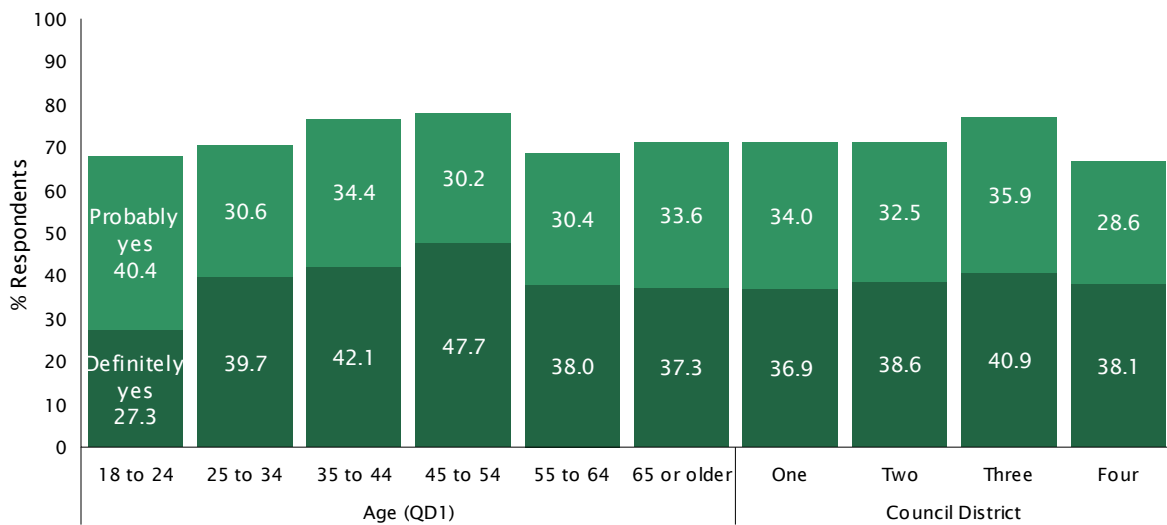


FIGURE 22 SUPPORT FOR ONE-CENT SALES TAX BY AGE & COUNCIL DISTRICT



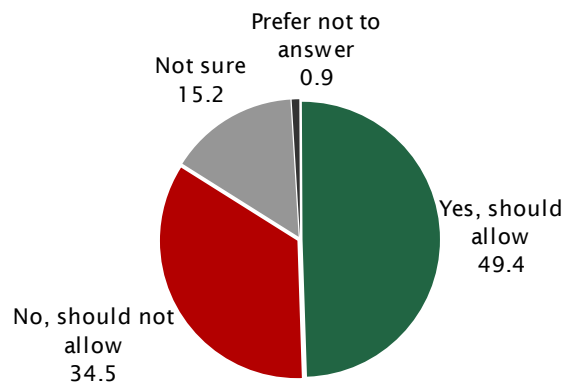
CANNABIS

Switching gears, the next section of the report explores voters' opinions, preferences, and concerns related to the operation and regulation of cannabis businesses in the City of Escondido. Under California law, it is legal for adults to use cannabis for medical and recreational purposes. The law also allows local cities like Escondido to decide whether to allow cannabis businesses to operate within their boundaries, as well as the types of restrictions and regulations to place on cannabis businesses. Currently, the City of Escondido does not allow any cannabis-related businesses.

INITIAL OPINION ON ALLOWING CANNABIS BUSINESSES IN CITY After providing respondents with the aforementioned legal and background information, Question 14 assessed whether residents feel cannabis businesses should be allowed to operate in Escondido. Overall, 49% of respondents indicated that the City of Escondido should allow cannabis businesses to operate in the City, 35% opposed the idea, and 16% were unsure or unwilling to state (Figure 23).

Question 14 *The City is also interested in your attitudes about cannabis. Under California law, it is legal for adults to use cannabis for medical and recreational purposes. The law also allows local cities like Escondido to decide whether to allow cannabis businesses to operate within their boundaries, as well as the types of restrictions and regulations to place on cannabis businesses. Currently, Escondido does not allow any cannabis related businesses. In general, do you think the City of Escondido should allow cannabis businesses to operate in the city - or are you not sure?*

FIGURE 23 SHOULD CITY ALLOW CANNABIS BUSINESSES IN ESCONDIDO?



Figures 24 and 25 on the next page show respondents' opinions regarding cannabis businesses operating in the City by a number of demographic traits. Individuals under 35 years of age, residents of Council District 1, those dissatisfied with the City's overall performance in providing municipal services, newer residents (less than 5 years), respondents who completed the survey in English, and those renting their home were the most likely to support allowing cannabis businesses to operate in Escondido.

FIGURE 24 ALLOW CANNABIS BUSINESS IN CITY BY AGE & COUNCIL DISTRICT

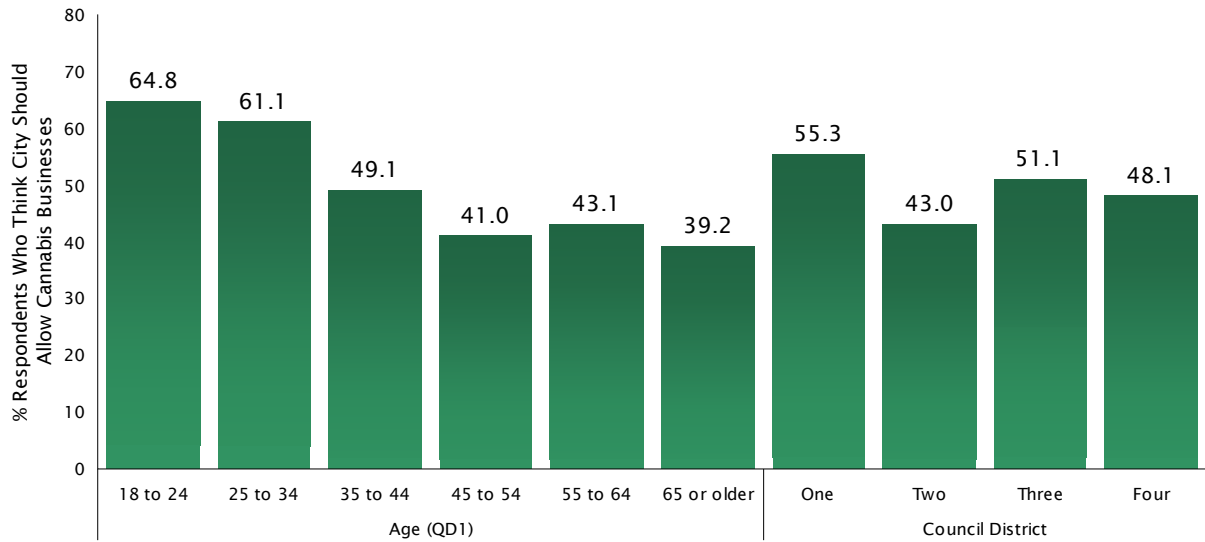
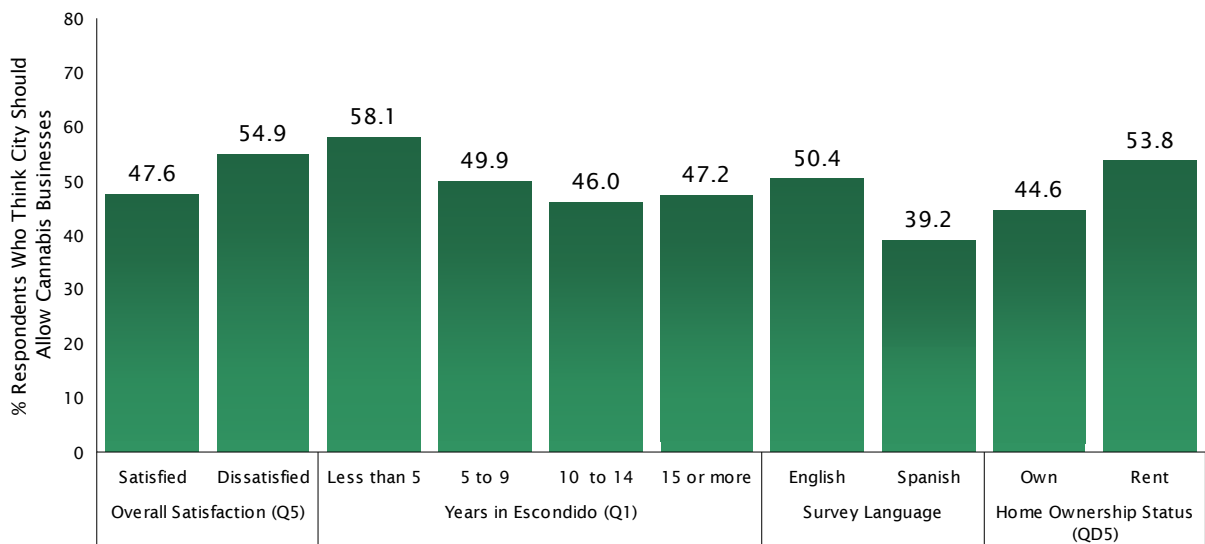


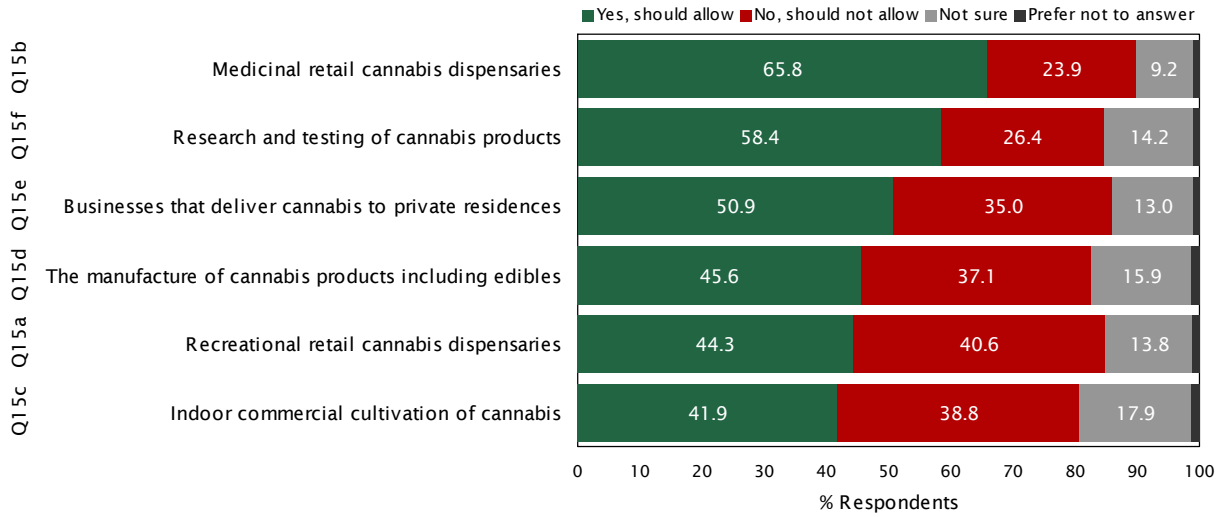
FIGURE 25 ALLOW CANNABIS BUSINESS IN CITY BY OVERALL SATISFACTION, YEARS IN ESCONDIDO, SURVEY LANGUAGE & HOME OWNERSHIP STATUS



OPINION BY TYPE OF BUSINESS The next question assessed whether opinions of cannabis businesses vary based on the *type* of operation (cultivation, manufacturing, research and testing, distribution, and delivery), as well as the intended use of the product. Figure 26 on the next page shows that the majority of all respondents were in favor of allowing medicinal retail cannabis dispensaries to operate in the City (66%), research and testing of cannabis products (58%), and businesses that deliver cannabis to private residences (51%). There was less support found for the manufacture of cannabis products including edibles (46%), recreational retail cannabis dispensaries (44%), and indoor commercial cultivation of cannabis (42%), although it is worth noting that even for these categories of businesses support exceeded opposition, as a significant percentage of respondents indicated they were unsure.

Question 15 *There are different types of cannabis businesses. In your opinion, should the City allow: _____ within the city?*

FIGURE 26 ALLOWING DIFFERENT TYPES OF CANNABIS BUSINESSES IN CITY



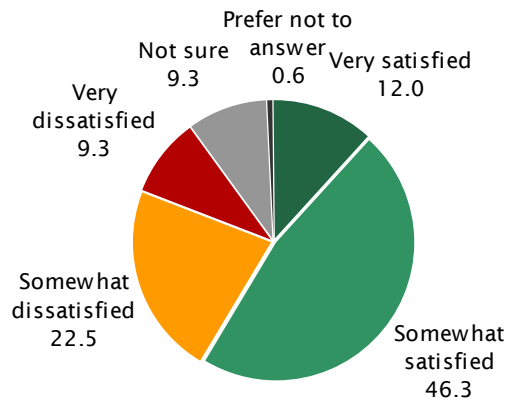
COMMUNICATIONS

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 Escondido’s efforts to enhance the information flow to the City to better understand the community’s concerns, perceptions, and needs. Some of Escondido’s many efforts to communicate with its residents include its newsletters, timely press releases, social media, and its website. In this section, we present the results of several communication-related questions.

SATISFACTION WITH COMMUNICATION Question 16 asked Escondido residents to report their satisfaction with the City’s efforts to communicate through newsletters, the Internet, social media, and other means. Overall, 58% of respondents indicated they were satisfied with the City’s efforts to communicate with residents through newsletters, the Internet, social media, and other means. The remaining respondents were either dissatisfied with the City’s efforts in this respect (32%) or unsure of their opinion (10%).

Question 16 *Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means?*

FIGURE 27 SATISFACTION WITH COMMUNICATION



The next two figures display how satisfaction with the City’s efforts to communicate with residents varied by a number of demographics. Satisfaction with the City’s communication efforts was generally consistent across subgroups. The exceptions to this pattern occur among those generally dissatisfied with the City’s overall performance in providing municipal services and residents under the age of 25 who expressed notably lower levels of satisfaction.

FIGURE 28 SATISFACTION WITH COMMUNICATION BY YEARS IN ESCONDIDO, CHILD IN HSLD, GENDER, HOME OWNERSHIP STATUS & OVERALL SATISFACTION

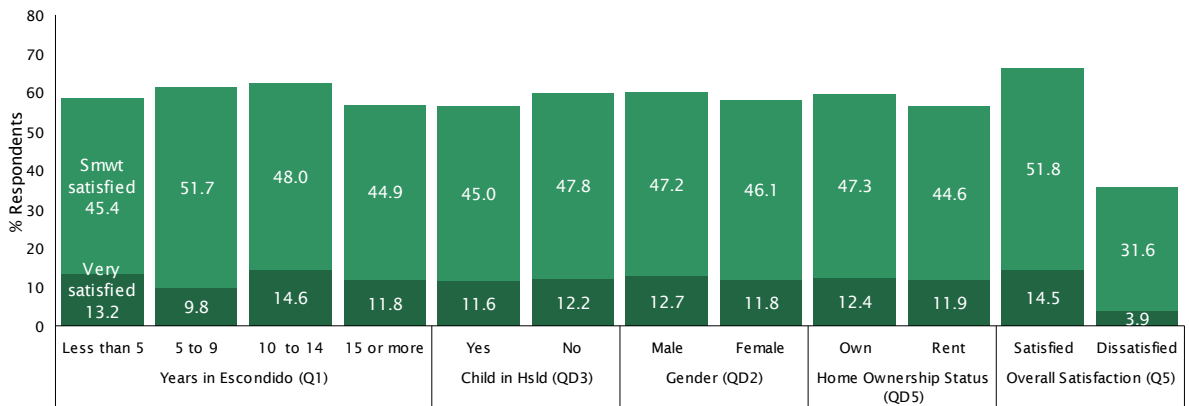
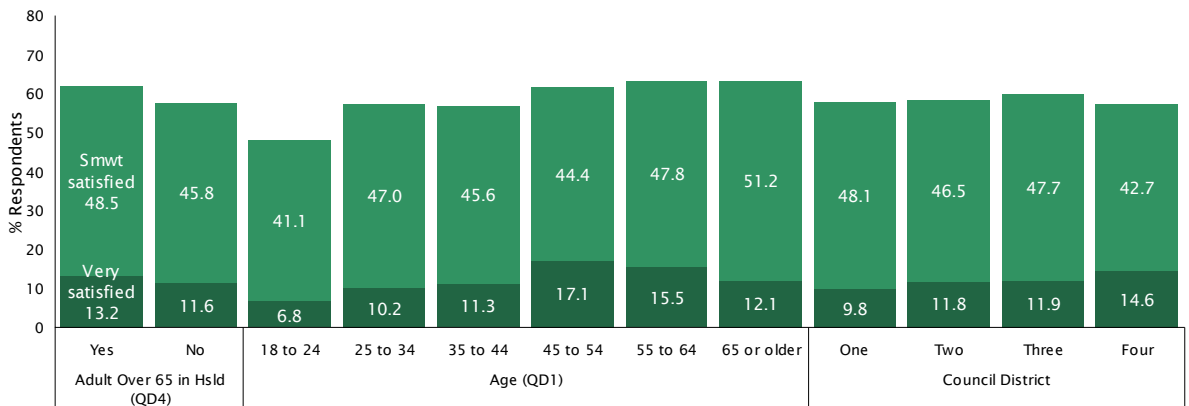


FIGURE 29 SATISFACTION WITH COMMUNICATION BY ADULT OVER 65 IN HSLD, AGE & COUNCIL DISTRICT



COMMUNICATION PREFERENCES The next communication-related question presented residents with the methods shown to the left of Figure 30 on the next page and asked whether each would be an effective way for the City to communicate with them. Overall, respondents cited email and electronic newsletters as the most effective method (87% very or somewhat effective), followed by the City’s website (77%), and social media sites like Facebook, Twitter, and Next Door (76%). Approximately two-thirds of respondents also rated text messages (71%), postcards, letters and newsletters mailed to their home (71%), a smart phone app (68%), and townhall meetings (68%) as effective ways for the City to communicate with them.

Tables 10 and 11 display the percentage of respondents who perceived each communication method as *very effective* by their overall satisfaction with the City’s performance, age, presence of a child in the home, Council District, and interview language, with the top three most effective methods within each subgroup highlighted green.

Question 17 *As I read the following ways that the City of Escondido 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 30 EFFECTIVENESS OF COMMUNICATION EFFORTS

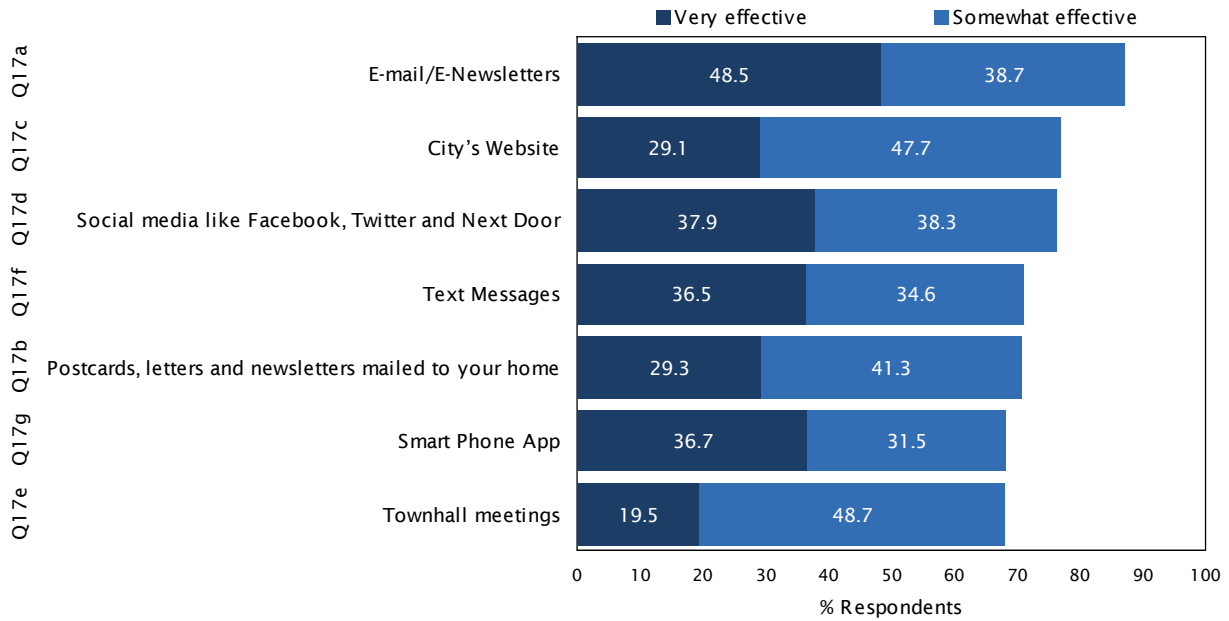


TABLE 10 EFFECTIVENESS OF COMMUNICATION EFFORTS BY OVERALL SATISFACTION & AGE (SHOWING % VERY EFFECTIVE)

	Overall Satisfaction (Q5)		Age (QD1)					
	Satisfied	Dissatisfied	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
E-mail/E-Newsletters	51.8	37.1	42.2	49.0	48.3	43.1	51.8	55.2
Social media like Facebook, Twitter and Next Door	36.8	39.5	56.1	50.3	44.5	37.3	26.1	18.7
Smart Phone App	35.4	40.9	40.5	45.3	47.4	40.0	32.2	17.9
Text Messages	36.0	37.7	35.4	46.8	44.2	40.8	31.7	21.6
Postcards, letters and newsletters mailed to your home	29.2	29.7	25.2	32.2	25.0	24.1	27.5	39.3
City's Website	29.9	25.6	26.7	34.1	27.0	31.1	28.3	25.7
Townhall meetings	18.7	20.7	23.2	20.3	14.5	19.6	21.7	17.7

TABLE 11 EFFECTIVENESS OF COMMUNICATION EFFORTS BY CHILD IN HSLD, COUNCIL DISTRICT & SURVEY LANGUAGE (SHOWING % VERY EFFECTIVE)

	Child in HslD (QD3)		Council District (Q51)				Survey Language	
	Yes	No	One	Two	Three	Four	English	Spanish
E-mail/E-Newsletters	47.4	49.8	42.1	50.2	48.8	52.9	48.8	45.3
Social media like Facebook, Twitter and Next Door	45.6	34.0	43.3	34.1	40.4	33.9	37.0	46.6
Smart Phone App	47.3	31.4	44.1	34.4	33.6	34.7	36.3	40.7
Text Messages	45.3	32.2	40.9	35.5	35.3	34.1	35.5	45.4
Postcards, letters and newsletters mailed to your home	29.5	29.6	32.3	26.8	29.8	28.5	28.0	42.1
City's Website	31.8	28.0	30.6	26.0	33.9	25.9	29.4	25.8
Townhall meetings	17.5	20.3	22.5	17.1	20.3	17.9	18.9	24.4

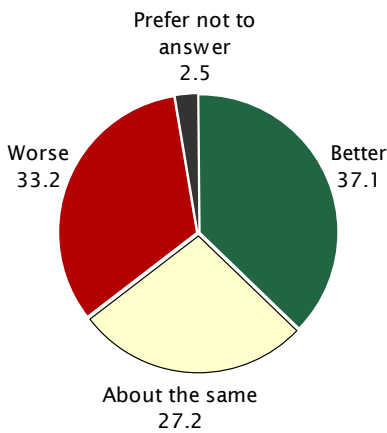
COVID & THE ECONOMY

The arrival of coronavirus in California triggered a statewide shelter-in-place mandate in March, effectively shuttering most sectors of the world’s fifth largest economy for the next three months. Although the State has begun a phased reopening of the economy, the public health and economic impacts of the coronavirus are likely to be felt well into the future. Recognizing that residents’ experiences with COVID-19 and their personal economic experiences and expectations may shape their priorities and how they view the City’s performance, the survey included a series of questions on these topics.

ECONOMIC EXPECTATIONS & EXPERIENCES When asked about their expectations for the economy six months into the future, Escondido residents expressed an even mix of optimism and pessimism, with 37% anticipating the economy will be better than today, 33% expecting it to be worse than today, and 27% indicating it will be about the same as today (Figure 31).

Question 18 *Looking ahead six months from now, do you think the economy will be better than today, be about the same as today, or will it be worse than today?*

FIGURE 31 OPINION OF ECONOMY IN SIX MONTHS



Expectations for the economy varied substantially across respondent subgroups, especially by age and employment status (see figures 32 & 33). In general, older individuals and retirees were the most optimistic about the trajectory of the economy, whereas those under 35 years of age, students, and those currently in-between jobs were the most pessimistic about the economy six months from now.

FIGURE 32 OPINION OF ECONOMY IN SIX MONTHS BY AGE & COUNCIL DISTRICT

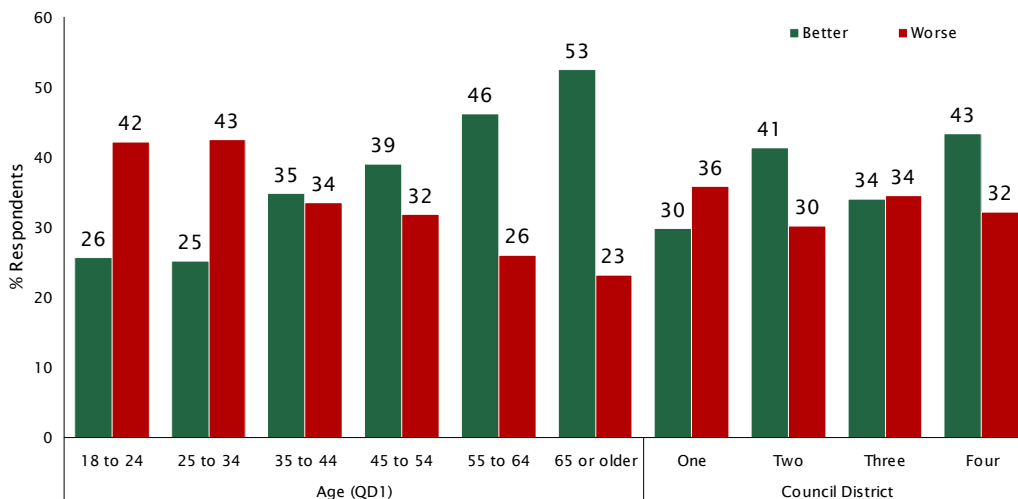
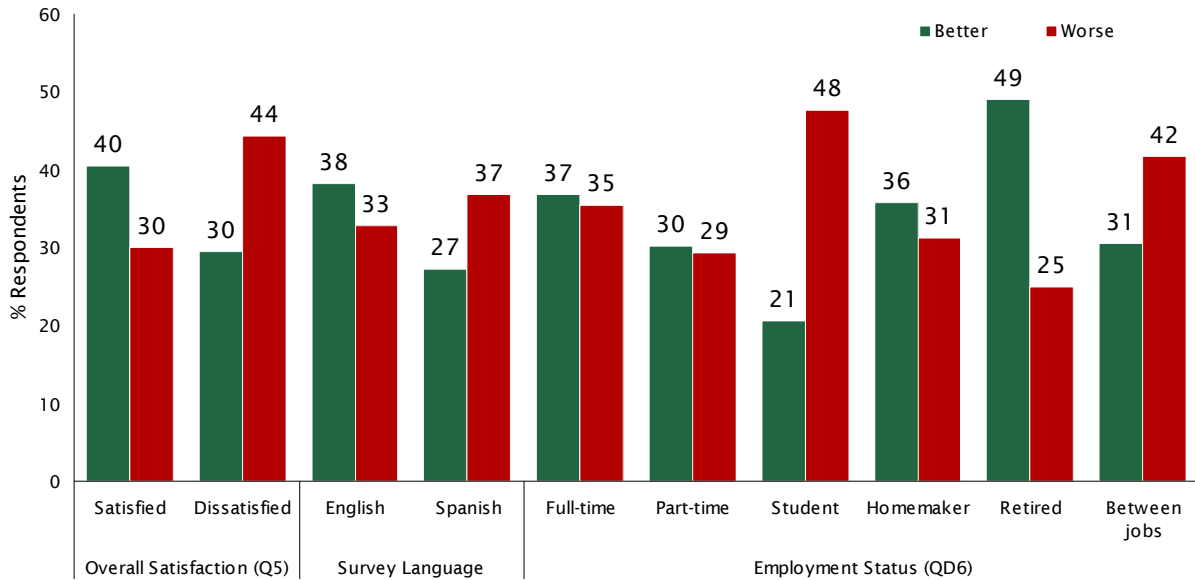


FIGURE 33 OPINION OF ECONOMY IN SIX MONTHS BY OVERALL SATISFACTION, SURVEY LANGUAGE & EMPLOYMENT STATUS



Turning now to their own household, the survey inquired as to whether they or anyone in their household had been laid-off from their job in the two months prior to the survey. Nearly one-third of respondents (32%) reported that they and/or another member of their household had been laid off from their job during this period (Figure 34). Figure 35 on the next page shows that respondents' expectations for the economy were related to their households' experience with lay-offs in the two months prior to the interview, with those optimistic about the economy being the least likely to report that they and/or someone in their household had by laid-off.

Question 21 *Have you or anyone in your household been laid-off from your job in past two months?*

FIGURE 34 HSLD MEMBER LAID-OFF FROM JOB IN PAST 2 MONTHS

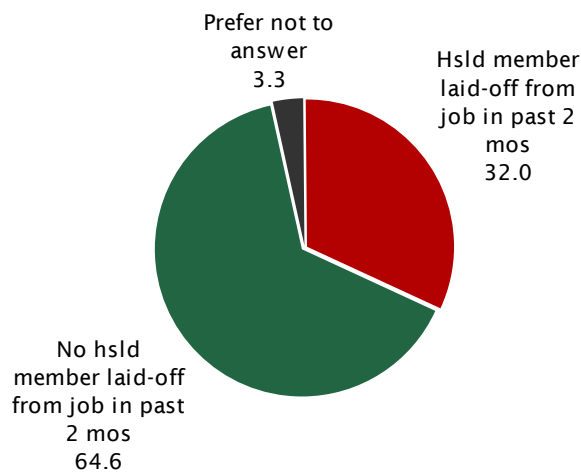


FIGURE 35 HSLD MEMBER LAID-OFF FROM JOB IN PAST 2 MONTHS BY COVID-19 CONCERN & OPINION OF ECONOMY IN SIX MONTHS

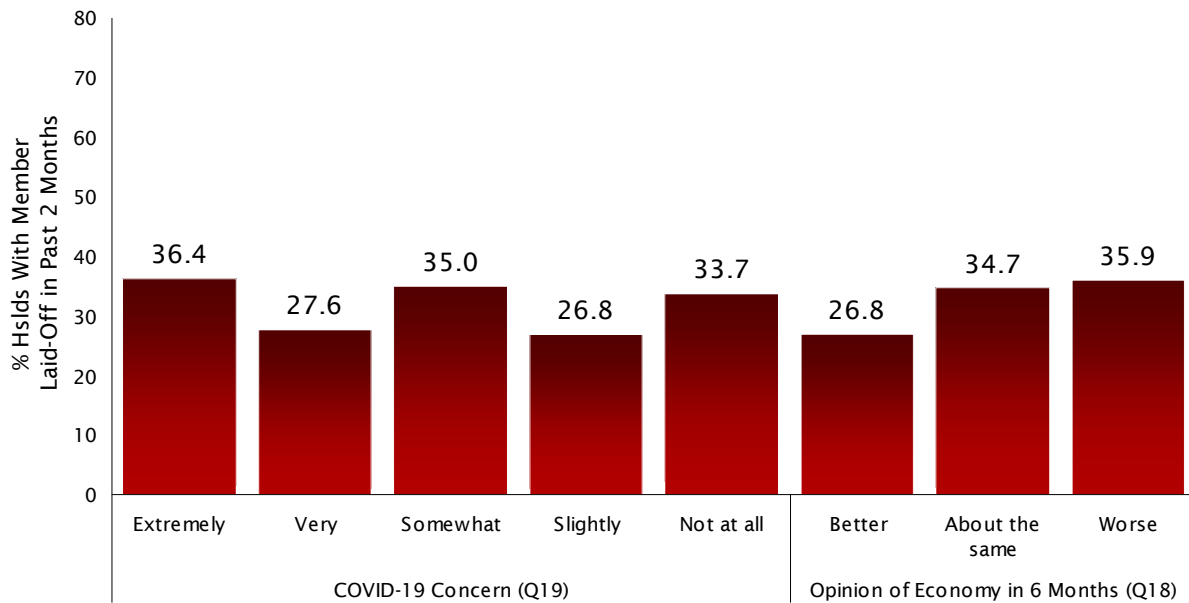
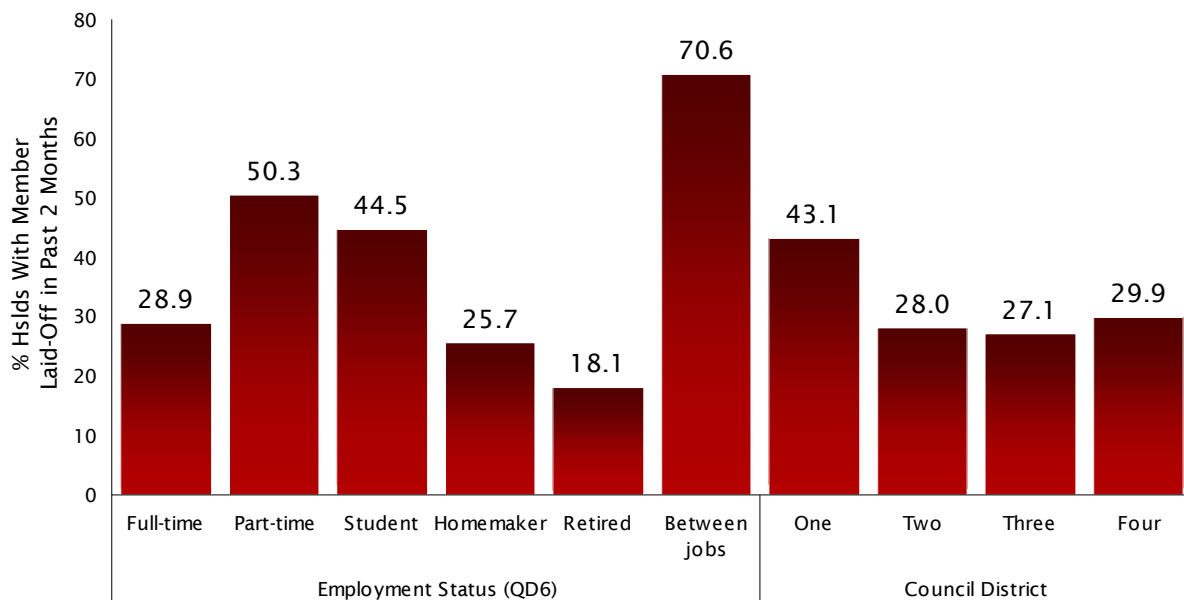


FIGURE 36 HSLD MEMBER LAID-OFF FROM JOB IN PAST 2 MONTHS BY EMPLOYMENT STATUS & COUNCIL DISTRICT



COVID-19 CONCERNS & EXPERIENCES Having measured respondents’ recent economic experiences and outlook, the survey transitioned to the topic of COVID-19. As shown in Figure 37, residents in Escondido expressed considerable concern when it comes to the coronavirus, with a majority indicating they are either extremely (27%) or somewhat (30%) concerned about COVID-19. The remainder were either somewhat (21%), slightly (12%), or not at all concerned (10%). Concerns about COVID-19 were highest among seniors, residents of Council District 1, those who completed the survey in Spanish, and students, retirees, and those in-between jobs (see figures 38 & 39).

Question 19 How concerned are you about the coronavirus known as COVID-19? Would you say you are extremely concerned, very concerned, somewhat concerned, slightly concerned, or not concerned?

FIGURE 37 CONCERNED ABOUT COVID-19

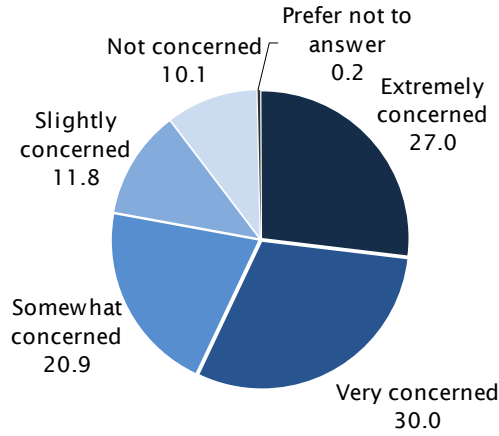


FIGURE 38 CONCERNED ABOUT COVID-19 BY AGE & COUNCIL DISTRICT

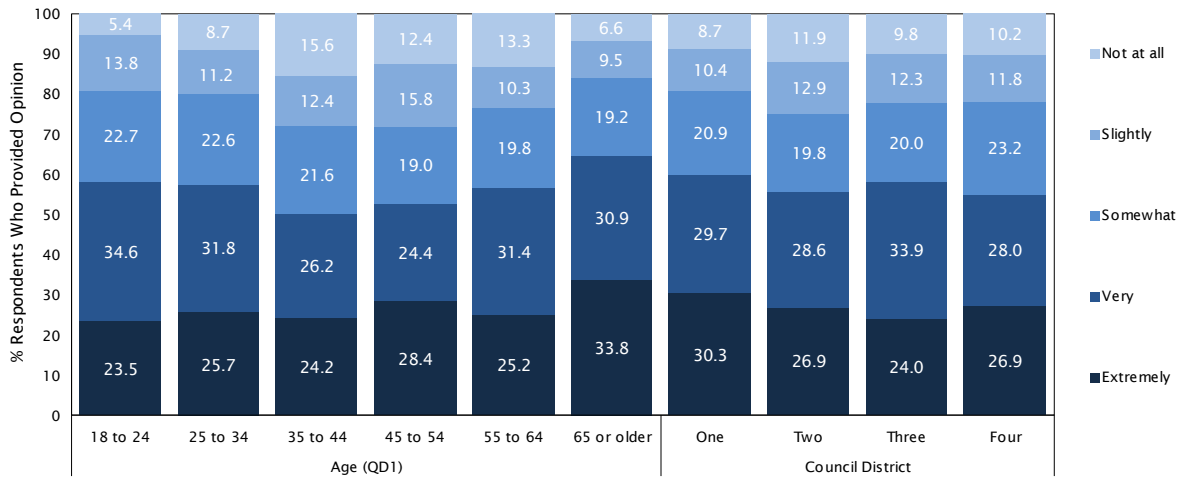
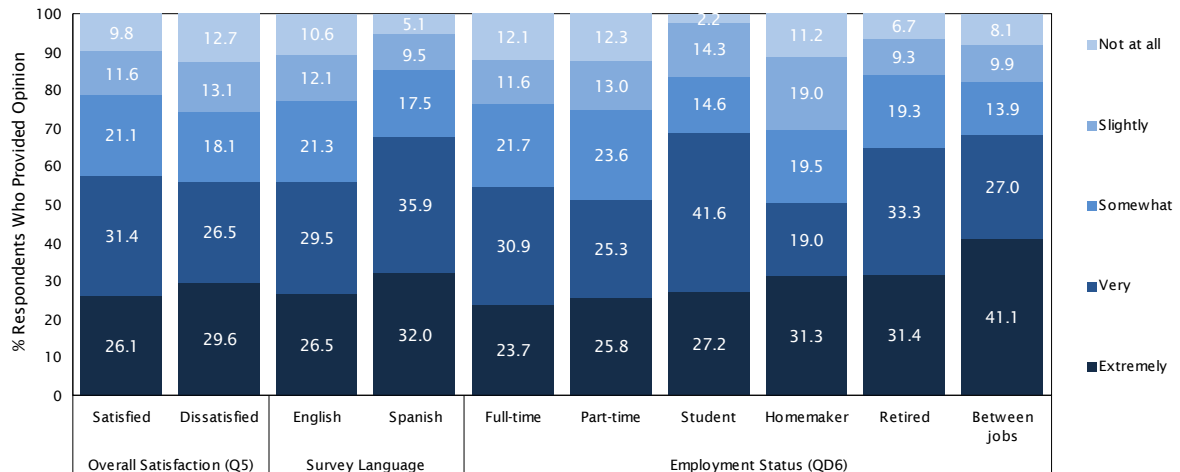


FIGURE 39 CONCERNED ABOUT COVID-19 BY OVERALL SATISFACTION, SURVEY LANGUAGE & EMPLOYMENT STATUS



The final question in this series asked respondents whether they or anyone they know has been hospitalized due to COVID-19. Overall, approximately one-in-five respondents (18%) indicated they or someone they know has been hospitalized due to COVID-19 (Figure 40). As one might expect, the level of concern expressed about COVID-19 is shaped by a respondents’ personal experiences, with those who were extremely concerned about COVID-19 being the most likely to also report knowing someone who has been hospitalized with the disease (see Figure 41).

Question 20 *Have you or anyone you know been hospitalized due to COVID-19?*

FIGURE 40 RESPONDENT/SOMEONE THEY KNOW HOSPITALIZED DUE TO COVID-19

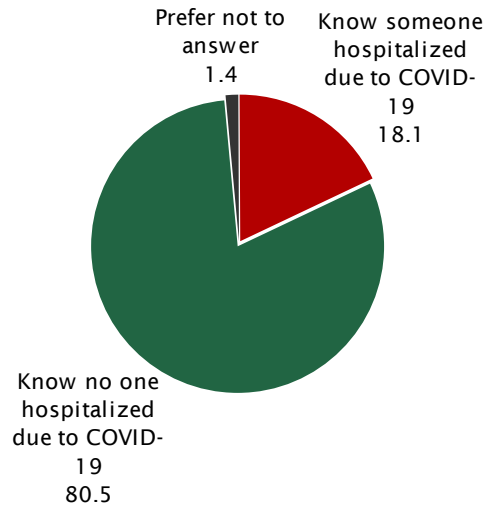


FIGURE 41 RESPONDENT/SOMEONE THEY KNOW HOSPITALIZED DUE TO COVID-19 BY COVID-19 CONCERN, ADULT OVER 65 IN HSLD & HOME OWNERSHIP STATUS

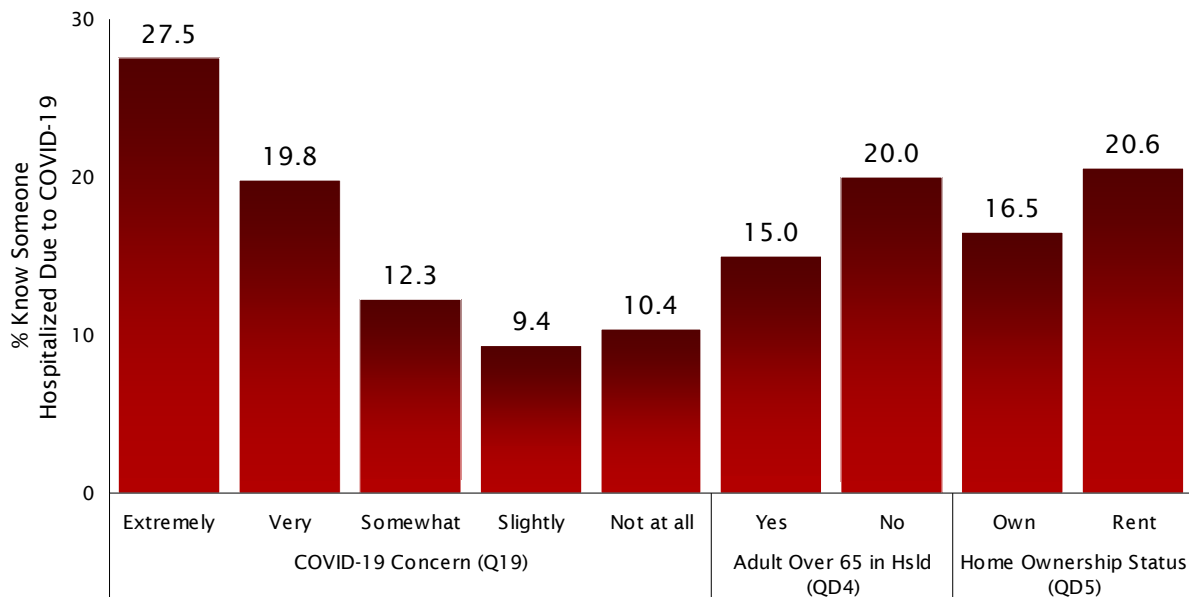
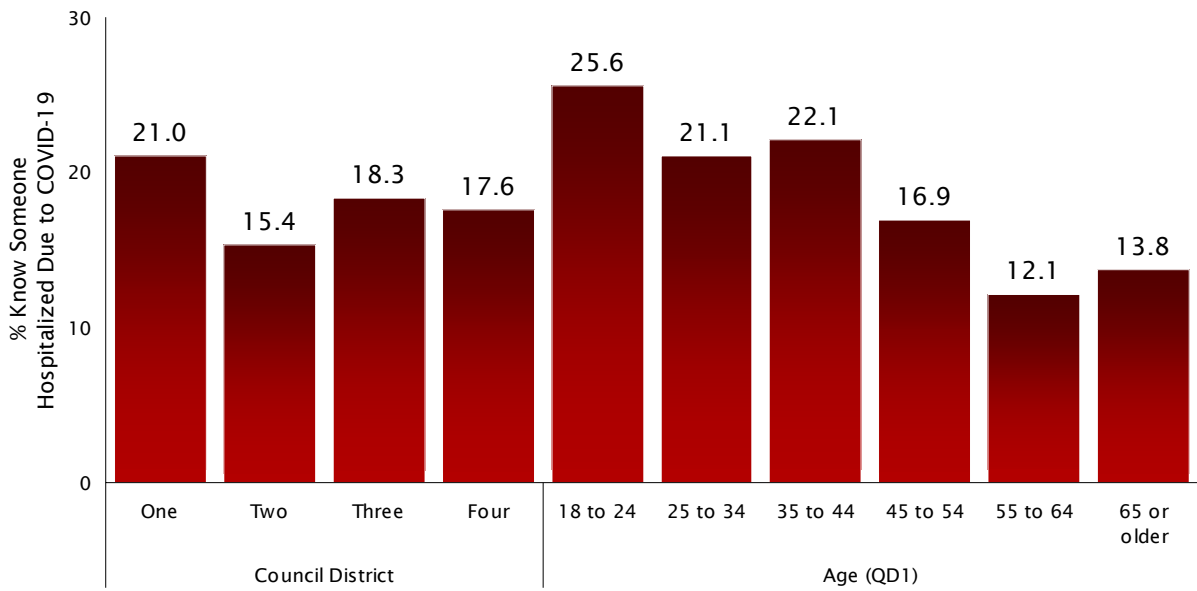


FIGURE 42 RESPONDENT/SOMEONE THEY KNOW HOSPITALIZED DUE TO COVID-19 BY COUNCIL DISTRICT & AGE





BACKGROUND & DEMOGRAPHICS

TABLE 12 DEMOGRAPHICS OF SAMPLE

<i>Total Respondents</i>	<i>2,000</i>
Years in Escondido (Q1)	
Less than 5	18.3
5 to 9	14.3
10 to 14	9.9
15 or more	57.0
Prefer not to answer	0.4
Child in Hsld (QD3)	
Yes	33.7
No	63.3
Prefer not to answer	3.0
Gender (QD2)	
Male	45.4
Female	51.4
Prefer not to answer	3.2
Age (QD1)	
18 to 24	12.9
25 to 34	22.6
35 to 44	15.2
45 to 54	13.6
55 to 64	15.6
65 or older	16.7
Prefer not to answer	3.4
Adult Over 65 in Hsld (QD4)	
Yes	32.5
No	64.7
Prefer not to answer	2.8
Home Ownership Status (QD5)	
Own	55.2
Rent	41.9
Prefer not to answer	2.9
Employment Status (QD6)	
Full-time	52.1
Part-time	10.2
Student	4.3
Homemaker	3.5
Retired	20.3
Between jobs	4.5
Prefer not to answer	5.0
Council District	
One	25.0
Two	25.0
Three	25.0
Four	25.0
Survey Language	
English	90.7
Spanish	9.3

Table 12 presents the key demographic information collected during the survey. 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, and ensure that the resulting sample matched the profile of Escondido's adult population on key characteristics.



M E T H O D O L O G Y

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 Escondido 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 reported in Question 11 they had interacted with city staff in the 12 months prior to the interview were asked to rate staff's performance in Question 12. The questionnaire included with this report (see *Questionnaire & Toplines* on page 46) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

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

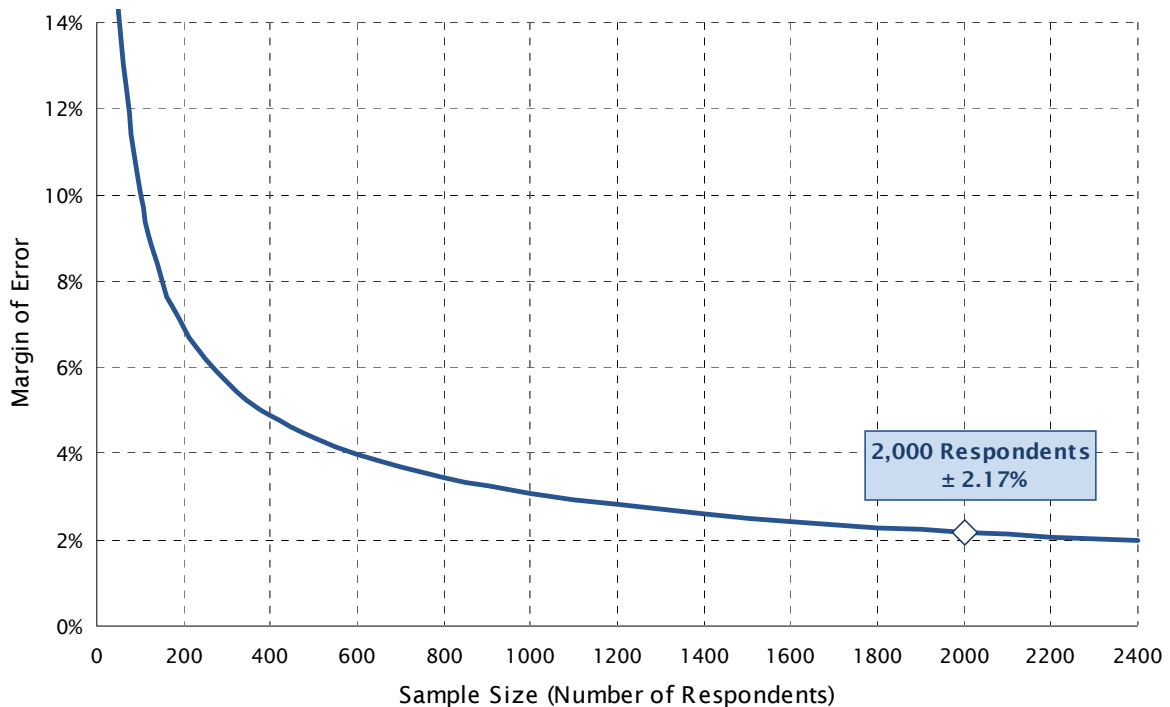
SAMPLE, RECRUITING & DATA COLLECTION A comprehensive database of Escondido households was utilized for this study, ensuring that all households in Escondido had the opportunity to participate in the survey. Households were recruited to participate in the survey through multiple recruiting methods. Using a combination of mailed and emailed invitations, a random selection of households was initially invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Each household was assigned a unique passcode to ensure that only Escondido 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 households throughout the City that had yet to participate in the online survey as a result of the emailed or mailed invitation.

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 2,000 interviews were gathered online and by telephone between June 3 and June 9, 2020.

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 2,000 adult residents for a particular question and what would have been found if all of the estimated 114,022 adult residents³ had been interviewed.

Figure 43 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is $\pm 2.17\%$ for questions answered by all 2,000 respondents.

FIGURE 43 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by demographic characteristics such as length of residence and age of the respondent. Figure 43 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

3. Source: U.S. Census Bureau, 2018 American Community Survey (ACS) estimate.

margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

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

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

QUESTIONNAIRE & TOPLINES



City of Escondido
Community Opinion Survey
Final Toplines (n=2,000)
June 2020

Section 1: Introduction to Study

Hi, may I please speak to: _____. Hi, my name is _____ and I'm calling from TNR, an independent public opinion research company. We're conducting a survey for the City of Escondido (ES-con-DEE-doh) about important issues and we would like to get your opinions.

If needed: This is a survey about important issues in your community. 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?

Section 2: 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 Escondido.

Q1 How long have you lived in the City of Escondido?

1	Less than 1 year	1%
2	1 to 4 years	17%
3	5 to 9 years	14%
4	10 to 14 years	10%
5	15 years or longer	57%
99	Prefer not to answer	0%

Q2 How would you rate: _____.? Would you say it is excellent, good, fair, poor or very poor?

		Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
	<i>Always ask A first, then randomize remaining items</i>							
A	The overall quality of life in the City	9%	56%	29%	5%	1%	0%	0%
B	Escondido as a place to raise a family	9%	37%	34%	10%	3%	5%	1%
C	Escondido as a place to work	7%	30%	27%	13%	4%	16%	2%
D	Escondido as a place to retire	10%	33%	27%	12%	8%	10%	1%
E	Escondido as a place to shop and dine	10%	42%	34%	10%	3%	0%	0%
F	Escondido as a place to play and recreate	9%	36%	35%	14%	5%	2%	0%

Q3	What do you like most about the City of Escondido that should be preserved in the future? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure, cannot think of anything specific	18%
	Parks, recreation facilities, opportunities	15%
	Downtown, Grand Ave	13%
	Diversity of business, cultures, activities	10%
	Small town feeling	10%
	Shopping, dining opportunities	10%
	Open space, green spaces	10%
	Cruisin' Grand	6%
	Historical places	5%
	Hiking, walking trails	4%
	Friendly people, neighbors	4%
	Sense of community	3%
	Public safety	3%
	Center for the Arts	3%
	Daley Ranch	3%
	Location, easy access	3%
	Dixon Lake	2%
	Kit Carson Park	2%
	Clean, well-maintained	2%
	Access to lakes, beaches	2%
	Quiet, peaceful	2%
	Well maintained infrastructure	1%
	Public library	1%
	Lake Hodges	1%
	Affordable houses	1%
	Grape Day Park	1%
	Good city services in general	1%
	Low cost of living	1%
	Mountains, hills	1%
	Agricultural, farmland areas	1%
	Relatively low traffic	1%
	Good schools	1%
	San Diego Zoo Safari Park	1%

	Plenty of parking	1%
	Weather, climate	1%
Q4	If the city government could change one thing to make Escondido a better place to live now and in the future, what change would you like to see? Verbatim responses recorded and later grouped into categories shown below.	
	Improve public safety, more police presence	17%
	Address homeless issues	15%
	Improve infrastructure, streets, sidewalks	11%
	Not sure, cannot think of anything	11%
	Clean-up, beautify City, landscape, graffiti	9%
	Improve parks, recreation	7%
	Improve schools, education	7%
	Provide more affordable housing	6%
	Improve business environment, attract new businesses	6%
	Provide more high-end restaurants	4%
	Provide more community events, activities for all ages	4%
	No changes / Everything is fine	4%
	Improve, maintain downtown area	3%
	Improve old empty buildings, houses	3%
	Address racial issues, inequality	3%
	Less residential density, high rise apartments, condos	3%
	Reduce traffic congestion	2%
	Address parking issues	2%
	Address Illegal immigration issues	2%
	Improve local economy, job opportunities	2%
	Provide more shopping opportunities	2%
	Reduce taxes, fees	1%
	Enforce traffic laws	1%
	Add, improve street lighting	1%
	Improve government, leadership	1%
	Limit growth, development	1%
	Provide more entertainment, nightlife	1%
	Enforce city codes	1%
	Improve public transportation	1%
	Improve planning, city development	1%
	Add more bike lanes	1%

Improve library	1%
Improve City-resident communication	1%
Synchronize traffic lights	1%
Address police reform issues	1%
Improve environmental efforts	1%
Improve cost of living	1%
Improve budgeting, fiscal responsibility	1%

Section 3: City Services

Next, I would like to ask a series of questions about services provided by the City of Escondido.

Q5 Generally speaking, are you satisfied or dissatisfied with the job the City of Escondido is doing to provide city services? *Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?*

1	Very satisfied	18%
2	Somewhat satisfied	54%
3	Somewhat dissatisfied	15%
4	Very dissatisfied	5%
98	Not sure	7%
99	Prefer not to answer	0%

Q6 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.

	<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not at all Important	Not sure	Prefer not to answer
A	Providing police services	61%	24%	9%	5%	0%	1%
B	Reducing crime and gang activity	74%	19%	6%	1%	0%	0%
C	Providing fire protection and prevention services	68%	26%	6%	0%	0%	0%
D	Providing paramedic and emergency medical services	68%	26%	5%	0%	0%	0%
E	Preparing the City for emergencies and natural disasters	56%	34%	9%	1%	1%	0%
F	Preserving natural open space and parkland	58%	30%	11%	1%	0%	0%
G	Maintaining and repairing local streets and roads	60%	34%	5%	0%	0%	0%
H	Maintaining sewer and storm drain systems	54%	38%	7%	0%	0%	0%
I	Keeping public areas clean and free of graffiti	56%	32%	10%	1%	0%	0%
J	Maintaining parks, sports fields, and recreation facilities	47%	40%	12%	1%	0%	0%

K	Providing special events such as concerts in the park and holiday festivals	23%	31%	37%	8%	1%	0%
L	Addressing homelessness	62%	27%	10%	1%	0%	0%
M	Providing a variety of recreation programs for all ages	31%	38%	27%	4%	1%	0%
N	Providing services and programs for seniors	28%	39%	28%	3%	1%	0%
O	Managing traffic congestion	39%	41%	19%	1%	0%	0%
P	Attracting businesses and good paying jobs to the City	52%	34%	13%	1%	0%	0%
Q	Providing arts and cultural activities	27%	37%	30%	5%	1%	0%
R	Providing library services	35%	34%	24%	7%	1%	0%
Q7	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? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>						
	<i>Randomize</i>	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide police services	30%	46%	9%	7%	6%	2%
B	Reduce crime and gang activity	11%	34%	30%	15%	9%	1%
C	Provide fire protection and prevention services	37%	45%	5%	1%	11%	1%
D	Provide paramedic and emergency medical services	38%	43%	5%	2%	12%	1%
E	Prepare the City for emergencies and natural disasters	14%	42%	13%	4%	25%	1%
F	Preserve natural open space and parkland	23%	50%	15%	5%	7%	1%
G	Maintain and repair local streets and roads	11%	36%	31%	20%	2%	1%
H	Maintain sewer and storm drain systems	23%	49%	11%	3%	13%	1%
I	Keep public areas clean and free of graffiti	16%	45%	25%	10%	3%	1%
J	Maintain parks, sports fields, and recreation facilities	22%	56%	12%	4%	6%	1%
K	Provide special events such as concerts in the park and holiday festivals	19%	48%	15%	5%	11%	2%
L	Address homelessness	5%	23%	33%	31%	7%	1%
M	Provide a variety of recreation programs for all ages	15%	47%	16%	5%	16%	2%
N	Provide services and programs for seniors	11%	41%	12%	3%	31%	2%
O	Manage traffic congestion	12%	49%	24%	10%	4%	1%
P	Attract businesses and good paying jobs to the City	8%	33%	29%	14%	15%	1%
Q	Provide arts and cultural activities	19%	49%	15%	4%	12%	1%
R	Provide library services	21%	46%	13%	6%	12%	1%

Section 4: Spending Priorities							
The City of Escondido has limited financial resources to provide the services and projects desired by residents. Because it can't fund <i>every</i> service and project, the City must set priorities.							
Q8	As I read each of the following items, please indicate whether you think the City should make the item a high priority, a medium priority, or a low priority for future city spending. If you feel the City should not spend any money on this item, just say so. Please keep in mind that not all of the items can be high priorities.						
	Here is the (first/next) one: _____. Should this item be a high, medium or low priority for the City - or should the City not spend any money on this item?						
	<i>Randomize</i>	High Priority	Medium Priority	Low Priority	Should not spend money	Not sure	Prefer not to answer
A	Expand and improve Grape Day Park	12%	32%	40%	14%	3%	0%
B	Upgrade parks and recreation facilities throughout the City	23%	46%	26%	4%	1%	0%
C	Build an Aquatics Center/competitive swimming complex	8%	18%	40%	30%	4%	0%
D	Make street, intersection, and signal improvements to reduce traffic congestion	44%	36%	17%	3%	1%	0%
E	Improve the City's library facilities and services	19%	35%	33%	10%	3%	0%
F	Build an indoor soccer facility	4%	12%	39%	41%	3%	0%
G	Improve the maintenance and repair of city streets and sidewalks	60%	32%	6%	1%	0%	0%
H	Repair aging sewer pipes and storm drains	55%	37%	5%	0%	2%	0%
I	Address homelessness	63%	26%	7%	2%	1%	0%
J	Support the development of affordable housing for low-income families	40%	27%	18%	14%	1%	1%
K	Support the development of affordable housing for middle-income families	37%	38%	16%	8%	2%	0%

Section 5: Local Governance & Customer Service										
<p>Q9 Next, I'm going to read you a series of statements about the City of Escondido. For each, I'd like you to tell me whether you agree or disagree with the statement.</p> <p>Here is the (first/next) one: _____. Do you agree or disagree, or do you not have an opinion? <i>If agree or disagree, ask: Would that be strongly (agree/disagree) or somewhat (agree/disagree)?</i></p>										
	<i>Randomize</i>				Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not sure	Prefer not to answer
A	The City is responsive to residents' needs				8%	41%	24%	9%	18%	1%
B	The City manages its finances well				6%	31%	18%	8%	36%	1%
C	The City listens to residents when making important decisions				6%	36%	23%	11%	23%	1%
D	I trust the City of Escondido				11%	48%	19%	8%	13%	1%
<p>Q10 How much attention do you pay to the issues, decisions and activities of your City government? Would you say that you are very attentive, somewhat attentive, slightly attentive, or not at all attentive?</p>										
	1	Very attentive				18%				
	2	Somewhat attentive				48%				
	3	Slightly attentive				29%				
	4	Not at all attentive				5%				
	98	Not sure				1%				
	99	Prefer not to answer				1%				
<p>Q11 In the past 12 months, have you been in contact with staff from the City of Escondido?</p>										
	1	Yes				34%		Ask Q12		
	2	No				60%		Skip to Q13		
	98	Not sure				3%		Skip to Q13		
	99	Prefer not to answer				3%		Skip to Q13		
<p>Q12 In your opinion, was the staff at the City very _____, somewhat _____, or not at all _____. <i>Read one item at a time, continue until all items are read.</i></p>										
	<i>Randomize</i>				Very	Somewhat	Not at all	Not sure	Prefer not to answer	
A	Helpful				50%	36%	13%	1%	1%	
B	Professional				63%	29%	5%	2%	2%	
C	Accessible				47%	42%	9%	1%	1%	

Section 6: Sales Tax

Later this year, voters in Escondido may be asked to vote on a local ballot measure. Let me read you a summary of the measure.

To provide funding for general city services in the City of Escondido, including:

- Police patrols, gang, drug and crime prevention
- Fire protection, paramedic, and 9-1-1 emergency response
- Street maintenance, pothole repair
- Addressing homelessness
- Graffiti removal, park maintenance, library and other city services

Q13

shall an ordinance establishing a one-cent sales tax be adopted, providing approximately 25 million dollars annually for city services until ended by voters, with independent audits, citizen oversight, and all money locally controlled?

If the election were held today, would you vote yes or no on this measure? *Get answer, then ask:* Would that be definitely (yes/no) or probably (yes/no)?

1	Definitely yes	39%
2	Probably yes	33%
3	Probably no	9%
4	Definitely no	11%
98	Not sure	7%
99	Prefer not to answer	2%

Section 7: Cannabis

The City is also interested in your attitudes about cannabis.

Under California law, it is legal for adults to use cannabis for medical and recreational purposes. The law also allows local cities like Escondido to decide whether to allow **cannabis businesses** to operate within their boundaries, as well as the types of restrictions and regulations to place on cannabis businesses. Currently, Escondido does not allow any cannabis related businesses.

Q14

In general, do you think the City of Escondido should allow cannabis businesses to operate in the city – or are you not sure?

1	Yes, should allow	49%
2	No, should not allow	35%
98	Not sure	15%
99	Prefer not to answer	1%

Q15	There are different types of cannabis businesses. In your opinion, should the City allow: _____ within the city?				
	<i>Randomize</i>	Yes, allow	No, don't allow	Not sure	Prefer not to answer
A	Recreational retail cannabis dispensaries	44%	41%	14%	1%
B	Medicinal retail cannabis dispensaries	66%	24%	9%	1%
C	Indoor commercial cultivation of cannabis	42%	39%	18%	1%
D	The manufacture of cannabis products including edibles	46%	37%	16%	1%
E	Businesses that deliver cannabis to private residences	51%	35%	13%	1%
F	Research and testing of cannabis products	58%	26%	14%	1%

Section 8: Communications

Q16	Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?					
	1	Very satisfied	12%			
	2	Somewhat satisfied	46%			
	3	Somewhat dissatisfied	23%			
	4	Very dissatisfied	9%			
	98	Not sure	9%			
	99	Prefer not to answer	1%			
Q17	As I read the following ways that the City of Escondido 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.					
	<i>Randomize</i>	Very Effective	Somewhat Effective	Not Effective	Not sure	Prefer not to answer
A	E-mail/E-Newsletters	48%	39%	9%	4%	0%
B	Postcards, letters and newsletters mailed to your home	29%	41%	25%	4%	0%
C	City's Website	29%	48%	18%	5%	0%
D	Social media like Facebook, Twitter and Next Door	38%	38%	17%	6%	1%
E	Townhall meetings	19%	49%	24%	7%	0%
F	Text Messages	36%	35%	19%	9%	1%
G	Smart Phone App	37%	31%	20%	11%	1%

Section 9: Background & Demographics		
Thank you so much for your participation. I have just a few background questions for statistical purposes.		
Q18	Looking ahead six months from now, do you think the economy will be better than today, be about the same as today, or will it be worse than today?	
	1 Better	37%
	2 About the same	27%
	3 Worse	33%
	99 Prefer not to answer	2%
Q19	How concerned are you about the coronavirus known as COVID-19? Would you say you are extremely concerned, very concerned, somewhat concerned, slightly concerned, or not concerned?	
	1 Extremely concerned	27%
	2 Very concerned	30%
	3 Somewhat concerned	21%
	4 Slightly concerned	12%
	5 Not concerned	10%
	99 Prefer not to answer	0%
Q20	Have you or anyone you know been hospitalized due to COVID-19?	
	1 Yes	18%
	2 No	80%
	99 Prefer not to answer	1%
Q21	Have you or anyone in your household been laid-off from your job in past two months?	
	1 Yes	32%
	2 No	65%
	99 Prefer not to answer	3%
D1	In what year were you born? Year recorded and grouped into age categories shown below.	
	18 to 24	13%
	25 to 34	23%
	35 to 44	15%
	45 to 54	14%
	55 to 64	16%
	65 or older	17%
	Prefer not to answer	3%

D2	What is your gender?		
	1	Male	45%
	2	Female	51%
	3	Not listed	0%
	99	Prefer not to answer	3%
D3	Do you have one or more children under the age of 18 living in your household?		
	1	Yes	34%
	2	No	63%
	99	Prefer not to answer	3%
D4	Do you have one or more adults 65 years of age or older in your household?		
	1	Yes	32%
	2	No	65%
	99	Prefer not to answer	3%
D5	Do you own or rent your residence in Escondido?		
	1	Own	55%
	2	Rent	42%
	99	Prefer not to answer	3%
D6	Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?		
	1	Employed full-time	52%
	2	Employed part-time	10%
	3	Student	4%
	4	Homemaker	3%
	5	Retired	20%
	6	In-between jobs	4%
	99	Prefer not to answer	5%
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 Escondido			

Post-Interview & Sample Items			
S1	Council District		
	1	One	25%
	2	Two	25%
	3	Three	25%
	4	Four	25%
S2	Survey Language		
	1	English	91%
	2	Spanish	9%