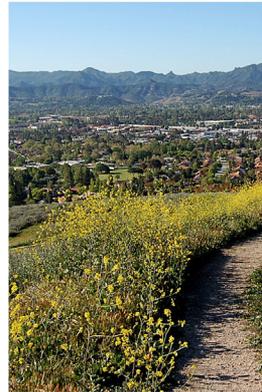


COMMUNITY OPINION SURVEY
SUMMARY RESEARCH REPORT

PREPARED FOR THE
CITY OF THOUSAND OAKS



MAY 8, 2017



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INTRODUCTION

Nestled against the Santa Monica Mountains in beautiful Ventura County, the City of Thousand Oaks is often referred to as a model master planned community. Incorporated in 1964 and currently home to an estimated 131,457 residents,¹ the City provides a full suite of services through nine departments²—City Manager, City Clerk, Community & Cultural Services, Community Development, Finance, Human Resources, Library Services, Police, and Public Works. In addition to the administrative, safety, and other services offered by most cities, Thousand Oaks provides additional services and amenities to its citizens that are designed to enhance the quality of life and sense of community in the City, including world-class cultural arts and entertainment, a teen center, senior center, 18-hole golf course and banquet facility, equestrian center, childcare center, and thousands of acres of natural open space for outdoor recreation.

As part of its commitment to provide high quality services and responsive local governance, the City engages its residents on a daily basis and receives regular feedback on issue, policy, and performance matters. Although these informal feedback mechanisms are valuable sources of information for the City in that they provide timely and accurate information about the opinions of specific residents, they do not necessarily provide an accurate picture of the community as a whole. Informal feedback mechanisms typically rely on the resident to initiate the feedback, which creates a self-selection bias. The City receives feedback only from those residents who are motivated enough to initiate the feedback process. Because these residents tend to be those who are either *very* pleased or *very* displeased regarding a particular topic, 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, and planning.

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

- Identify key issues of concern for residents, as well as their perceptions of the City.
- 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 local matters such as the Civic Arts Plaza, economic development, and public policy issues.
- Profile the effectiveness of the City's communication with residents.
- Collect additional background and demographic data that is relevant to understanding residents' perceptions, needs, and interests.

1. Source: California Department of Finance estimate, January 2017.

2. Fire prevention services are provided by the Ventura County Fire Protection District.

This is not the first statistically reliable ‘resident satisfaction’ survey conducted for the City—similar studies have been implemented in prior years dating back to 1989, with the most recent being completed by True North in 2009, 2013, and 2015. Because of the natural interest in tracking the City’s performance in meeting the evolving needs of its residents, where appropriate the results of the current study are compared with the results of identical questions included in previous studies.

STATISTICAL SIGNIFICANCE Many figures and tables in this report present the results of questions asked in 2017 alongside the results found in prior surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in public opinion between the most recent prior survey (2015) and the current (2017)—as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion between the two studies. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2017.

OVERVIEW OF METHODOLOGY Although a full description of the methodology used for this study is included later in this report (see *Methodology* on page 48), it is important at the outset to note that the study proceeded in two phases.

In the first phase, households were selected at random from the City of Thousand Oaks using a comprehensive database of residential addresses. Among these sampled households, the study employed a combination of mailed invitations, emailed invitations, and phone calls to recruit participation in the survey from 567 residents during the data collection period, which lasted from March 16 to April 3, 2017. Respondents were provided with the option to participate in the survey by telephone or online at a secure website hosted by True North. These interviews constitute the *Main* sample as they represent a statistically reliable, representative cross-section of the adult population in Thousand Oaks. The results discussed in the body of this report and the crosstabulations in Appendix A are based on the Main sample.

To accommodate the City’s interest in allowing all residents the opportunity to participate in the study—not just those who were selected at random for the Main sample—the second phase of the study will make an identical (but separate) survey available to interested residents. All households in the City will be mailed a postcard inviting them to participate in the survey online at a secure web site. The postcards will include two unique personal identification numbers for each household, thereby preventing non-residents from accessing the online survey and preventing resident households from participating more than twice. Surveys collected in this second phase of the study will constitute the *Supplemental* sample.

The Supplemental sample will represent a non-random group of interested residents, and will not necessarily be representative of the City’s adult population. For this reason, the results for the Supplemental sample will be analyzed separately and presented in a separate set of crosstabulations. The question-by-question analysis, key findings and conclusions of this report are based on the Main sample findings only—not the Supplemental sample.

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 two sections entitled *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 51) and a complete set of crosstabulations for the Main survey results is contained in Appendix A.

ACKNOWLEDGEMENTS True North thanks the City Council for having the foresight and the interest in conducting this survey, as well as staff at the City of Thousand Oaks who contributed valuable input during the design stage of this study, which was led by Andrew Powers (City Manager). Staff's collective experience, local knowledge, and insight 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 those of the City of Thousand Oaks, its City Council, or staff. 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, organizational development, establishing fiscal priorities, 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 350 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, the findings have been organized according to the section titles used in the body of this report. Thus, to learn more about a particular finding, simply turn to the appropriate report section.

QUALITY OF LIFE

- Nearly all residents in 2017 (96%) shared favorable opinions of the quality of life in Thousand Oaks, with 57% reporting it is excellent and 39% stating it is good. Just 4% of respondents used fair, poor, or very poor to describe the quality of life in the City.
- Just over half of residents (55%) perceived little or no change in the quality of life in Thousand Oaks over the past five years, offering that it is about the same now as it was in the past. Among those who did perceive a change during this period, respondents were split, with 19% saying that the quality of life has improved in Thousand Oaks, and 26% indicating that it had declined over the past five years.
- When asked what changes the City government could make to improve the quality of life in Thousand Oaks, the most common responses to this question were not sure/can't think of anything and no changes needed/everything is fine, collectively accounting for 21% of all responses. Among specific changes that were mentioned, the most common were reducing traffic congestion (18%), limiting growth/preserving open space (12%), engaging in economic development (11%), improving the maintenance of streets and roads (9%), and increasing recreational facilities and programs (8%).

CITY SERVICES

- The vast majority (89%) of Thousand Oaks residents in 2017 indicated that they were satisfied with the City's efforts to provide municipal services, with 43% stating that they were *very* satisfied. Approximately 7% of respondents indicated that they were dissatisfied with the City's overall performance, and an additional 3% indicated that they were unsure or unwilling to share their opinion.
- When asked to rate the importance of 18 specific services provided by the City, Thousand Oaks residents rated providing fire protection and emergency medical services as the most important (96% extremely or very important), followed by maintaining city streets and roads (93%), providing police service (93%), managing traffic congestion in the City (88%), and providing trash collection, recycling and household hazardous waste services (85%).
- The survey also asked about satisfaction with the City's efforts to provide the same 18 services. Although residents were generally satisfied with all of the services tested, they were most satisfied with the City's efforts to provide fire protection and emergency medical services (98%), provide library services (95%), provide police services (95%), provide trash collection, recycling and household hazardous waste services (92%), and maintain park areas (92%).

PERFORMANCE NEEDS

- Approximately half (49%) of residents surveyed perceived that the quality of the City's infrastructure remained about the same during the past five years, whereas 32% felt that the quality had improved during this period and 18% perceived that it had declined.

- Approximately 19% of respondents who perceived a trend in the quality of the City's infrastructure were unable to provide a specific reason or example to support their opinion, although it's worth noting that most of these residents held a generally positive opinion of the City's infrastructure.
- Among the specific *positive* reasons offered, newly paved and repaired streets, roads, and sidewalks were the most commonly mentioned (13%), followed by reference to clean, well-maintained streets and landscapes (6%), improved and developed parks (5%), and new development/infrastructure (4%).
- Interestingly, the top response among those who perceived a *negative* trend in the quality of the City's infrastructure was also the condition of streets, roads, and sidewalks and their need for repair (27%), followed by a worse traffic congestion (10%), and streets and landscapes in need of cleaning and maintenance (6%).

CIVIC ARTS PLAZA

- Half (50%) of residents surveyed in 2017 indicated that at least one member of their household had purchased tickets and attended a show/event at the Civic Arts Plaza during the 12 months prior to the interview.
- Among all respondents, 66% rated the quality of events and shows as excellent or good, 61% rated the variety of events and shows as excellent or good, and 55% used excellent or good to describe the overall entertainment value for a show. The comparable figures among those whose household had attended a show or event at the Plaza in the past year were considerably higher at 92%, 80%, and 77%, respectively.

SHOPPING & ECONOMIC DEVELOPMENT

- Approximately 54% of households in 2017 indicated that they spend at least half of their household's retail shopping dollars within the City, with 26% spending at least 80% of their dollars within the City, and 28% spending between 50% and 79% of their retail dollars within the City.
- More than half (58%) of respondents indicated that there are retail stores and restaurants their household currently visits outside of the City that they would like to have available locally in Thousand Oaks.
- When provided with an open-ended opportunity to identify businesses they would most like to have located in Thousand Oaks, the most commonly mentioned types of businesses were additional family restaurant chains such as Macaroni Grill and Claim Jumper and large discount stores such as Costco or Sam's Club, each mentioned by 18% of residents who desire additional stores and restaurants, followed by specialty goods stores such as REI and IKEA (12%), grocery store chains (11%), home improvement stores (11%), and ethnic restaurants (11%).

SPENDING PRIORITIES

- When asked to prioritize among a series of projects and programs that could be funded by the City in the future, maintaining fire protection services was assigned the highest priority (97% high or medium priority), followed by maintaining police services (96%), maintaining parks and recreation facilities (93%), investing in road maintenance (91%), and protecting water quality in creeks and streams (87%).

STAFF & GOVERNANCE

- Among those with an opinion, the City was rated highest for its performance in providing access to information (66% excellent or good), followed by being responsive to residents and businesses (62%), working through critical issues facing the City (58%), engaging with residents to get their feedback (57%), managing development and effectively planning for the future (57%), and spending tax dollars wisely (54%).
- More than one-third (37%) of respondents indicated that they had contacted Thousand Oaks staff at least once during the 12 months prior to the interview.
- At least 9 out of 10 residents indicating that Thousand Oaks staff are very or somewhat helpful (90%), professional (94%), and accessible (96%).

CITY-RESIDENT COMMUNICATION

- Overall, 70% of respondents in 2017 indicated they were satisfied with City's efforts to communicate with residents through newsletters, Internet, Social Media, and other means. The remaining respondents were either dissatisfied with the City's efforts in this respect (16%) or unsure of their opinion (14%).
- The most frequently-cited source for City information was *The Acorn* newspaper (69%), followed by the *Ventura County Star* newspaper (25%), the City's website (22%), and the Internet in general (19%). Other commonly mentioned sources included utility bill inserts (14%), social media including Facebook and Twitter (12%), friends/family/associates (11%), email notifications from the City (10%), and the Civic Arts Plaza Season Brochure (9%).
- Half (50%) of residents reported that they had visited the City's website during the 12 month period preceding the interview.
- Among those who had visited the City's website during the past year, at least six-in-ten rated the overall quality (67%), ability to find what they are looking for (60%), and variety of content and resources (70%) available on the site as excellent or good.

MEDICAL & NON-MEDICAL MARIJUANA

- With respect to *medical* marijuana, a clear majority of Thousand Oaks residents support allowing a limited number of dispensaries to locate within the City (56%), and the delivery of marijuana to private residences within the City (64%).
- Support for allowing *non-medical* marijuana dispensaries to locate within Thousand Oaks (39%) and the delivery of non-medical marijuana to private residences (36%) was confined to less than four-in-ten residents.
- Commercial cultivation of marijuana on private property was unpopular, with just one-third (34%) of Thousand Oaks residents in support of allowing this practice in the City.



CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide the City of Thousand Oaks with a statistically reliable understanding of the opinions, priorities, and concerns of its residents. Operating from the philosophy that you can't manage what you don't measure, since 2009 Thousand Oaks has periodically used the survey as a community needs assessment and performance measurement tool. In short, the study presents an opportunity to profile residents' needs and priorities, measure how well the City is performing in meeting these needs through existing services and facilities, and gather data on a variety of quality-of-life, issue, and policy-related matters. More than just a profiling exercise, the City uses the information gained from the surveys to adjust and improve its services—all toward the goal of building and sustaining a high level of community satisfaction.

Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer the key questions that motivated the research.

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

Thousand Oaks residents continue to be quite satisfied with the City's efforts to provide municipal services and facilities, as well as the quality of life in the City.

Overall, nearly nine-in-ten residents (89%) indicated that they were satisfied with the City's overall performance in providing municipal services, which is comparable to the figure recorded in 2015 (88%). The high level of satisfaction expressed with the City's performance *in general* was also mirrored in residents' assessments of the City's performance in providing specific services. For 17 of the 18 service areas tested, the City is meeting or exceeding the needs and expectations of more than three-quarters of residents (see *Performance Needs & Priorities* on page 21).

The City's performance in providing municipal services has also contributed to a high quality of life for residents. Nearly all residents surveyed (96%) rated the quality of life in Thousand Oaks as excellent or good. This sentiment was also widespread, with at least 90% of respondents in every identified demographic subgroup rating the quality of life in Thousand Oaks as excellent or good (see *Quality of Life* on page 11).

Another indicator of a well-managed city meeting its residents' needs is that when asked to indicate one thing that city government could do to make Thousand Oaks a better place to live, the most common response from residents was a request that the City continue what it is already doing (i.e., no changes) or a shrug of the shoulders (i.e., not sure).

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 Thousand Oaks 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. More than one-third (37%) of respondents indicated that they had contacted Thousand Oaks staff at least once during the 12 months prior to the interview, and at least 9-in-10 indicated that Thousand Oaks staff are helpful (90%), professional (94%), and accessible (96%).

How is the City perceived with respect to governance?

Although much of the survey focused on residents' satisfaction with the City's efforts to provide specific services, as with other progressive cities Thousand Oaks recognizes there is more to good local governance than simply providing satisfactory services. Do residents perceive that the City is responsive to residents' needs? How well is the City engaging with its residents? Do residents feel that the City is doing a good job managing development and effectively planning for the future? Answers to questions such as these are as important as service-related questions in measuring the City's performance in meeting residents' needs.

Among those with an opinion, the City was rated highest for its performance in providing access to information (66% excellent or good), followed by being responsive to residents and businesses (62%), working through critical issues facing the City (58%), engaging with residents to get their feedback (57%), managing development and effectively planning for the future (57%), and spending tax dollars wisely (54%). This is also an area that showed significant improvement over the past two years, with a statistically significant increase of 9% in the percentage of respondents who rated the City's responsiveness to residents and businesses as excellent or good (see *Staff & Governance* on page 35).

Where should the City focus its efforts in the future?

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

Considering respondents' verbatim answers regarding what they feel city government could do to make Thousand Oaks a better place to live (see *Ways to Improve Quality of Life* on page 14), as well as the list of services and their respective priority status for future city attention (see *Performance Needs & Priorities* on page 21), the top priorities for residents are managing traffic congestion in the City, managing growth and development/protecting open space, promoting economic development, and maintaining city streets and roads. Although these were also the top priorities from the 2015 study, it should be noted that the importance assigned to these issues has grown significantly during the past two years—especially with respect to traffic management (+14%) and managing growth and development (+12%).

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. That is, in some cases service improvements are needed to raise satisfaction with the City's performance. In other cases, particularly those that involve policies affecting services and facilities which are not readily apparent, the key may instead be to communicate better with residents about current efforts and future plans with respect to a particular service area. Choosing the appropriate balance of actual service improvements and efforts to raise awareness on these matters will be a key to maintaining and improving the community's overall satisfaction in the short- and long-term.

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

Do residents have clear opinions regarding medical and non-medical marijuana?

In 2015, the State of California passed a law creating a licensing process for commercial marijuana. In November 2016, California voters approved Proposition 64 to legalize the private, non-medical use of marijuana by adults. Proposition 64 was supported by 54% of Thousand Oaks residents.

Although it legalized the use of non-medical marijuana, Proposition 64 also placed a number of restrictions its use, including that it can't be consumed in a public place, within 1,000 feet of schools, daycare facilities or youth centers, or while driving or riding in a vehicle. Households are also limited to the cultivation of six (6) plants for personal use only. Under these laws, local cities also have the option of restricting or prohibiting the commercial cultivation, manufacturing, sale, and distribution of marijuana within their boundaries.

Recognizing that the City would be making important policy decisions in the future regarding both medical and non-medical marijuana, the survey took the opportunity to explore residents' opinions about the commercial cultivation of marijuana on private lands, the delivery of marijuana to private residences, as well as allowing marijuana dispensaries to locate within Thousand Oaks. The results make clear that community opinions regarding marijuana are conditioned by whether the use of the product is for *medical* or *non-medical* purposes.

With respect to *medical* marijuana, a clear majority of Thousand Oaks residents support allowing a limited number of dispensaries to locate within the City (56%), and the delivery of marijuana to private residences within the City (64%). However, support for allowing *non-medical* marijuana dispensaries to locate within Thousand Oaks (39%) and the delivery of non-medical marijuana to private residences (36%) was confined to less than four-in-ten residents. Commercial cultivation of marijuana on private property was also unpopular, with just one-third (34%) of Thousand Oaks residents in support of allowing this practice in the City.

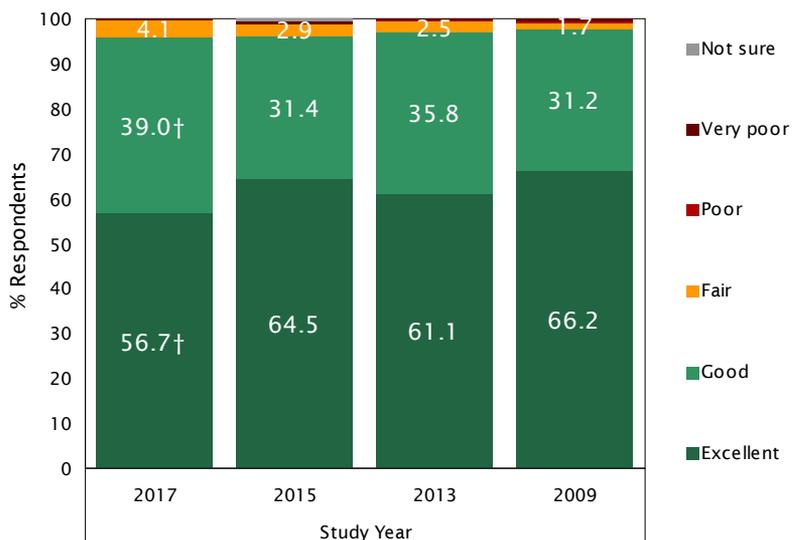
QUALITY OF LIFE

The opening series of questions in the survey was designed to assess residents' perceptions of the quality of life in Thousand Oaks, as well as what the City government could do to improve the quality of life, now and in the future.

OVERALL QUALITY OF LIFE At the outset of the interview, respondents were asked to rate the quality of life in the City using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 1 below, nearly all residents in 2017 (96%) shared favorable opinions of the quality of life in Thousand Oaks, with 57% reporting it is excellent and 39% stating it is good. Just 4% of respondents used fair, poor, or very poor to describe the quality of life in the City. When compared with 2015, there was a statistically significant decrease in the percentage of respondents who said *excellent* (-8%), and a corresponding increase in the percentage who said *good* (+8%).

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

FIGURE 1 QUALITY OF LIFE BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2015 and 2017 studies.

For the interested reader, figures 2 and 3 on the next page show how ratings of the quality of life in the City varied by length of residence, employment status, age, presence of children in the home, as well as home ownership status. Regardless of subgroup category, residents generally held very positive assessments of the quality of life in the City, with more than 90% of respondents in *every* subgroup category rating the quality of life in Thousand Oaks as either excellent or good.

FIGURE 2 QUALITY OF LIFE BY YEARS IN THOUSAND OAKS & EMPLOYMENT STATUS

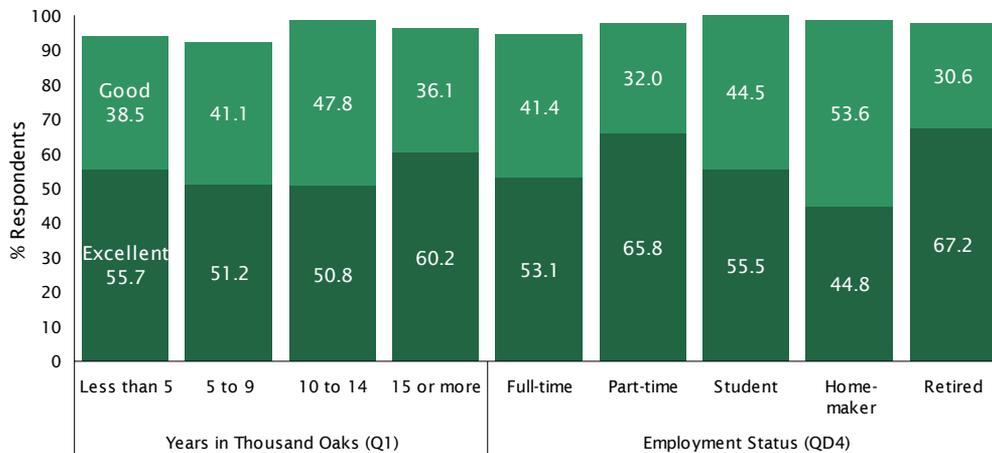
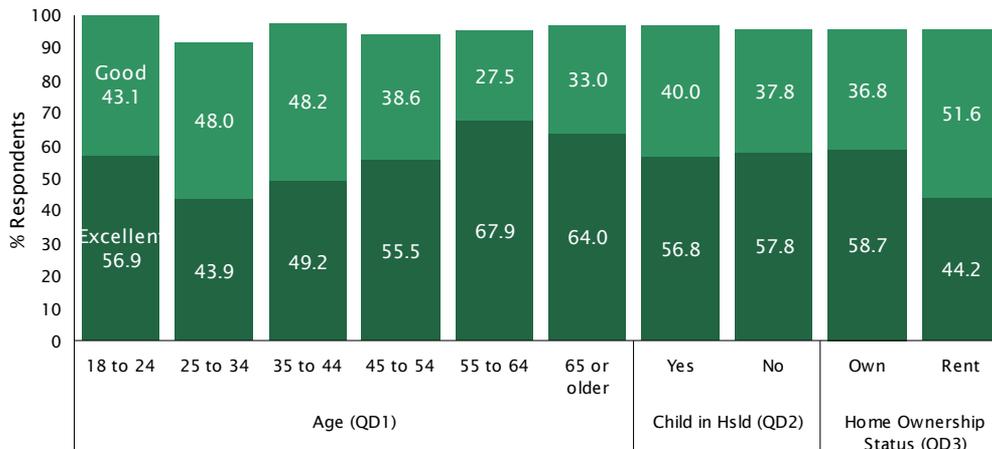


FIGURE 3 QUALITY OF LIFE BY AGE, CHILD IN HSLD & HOME OWNERSHIP STATUS

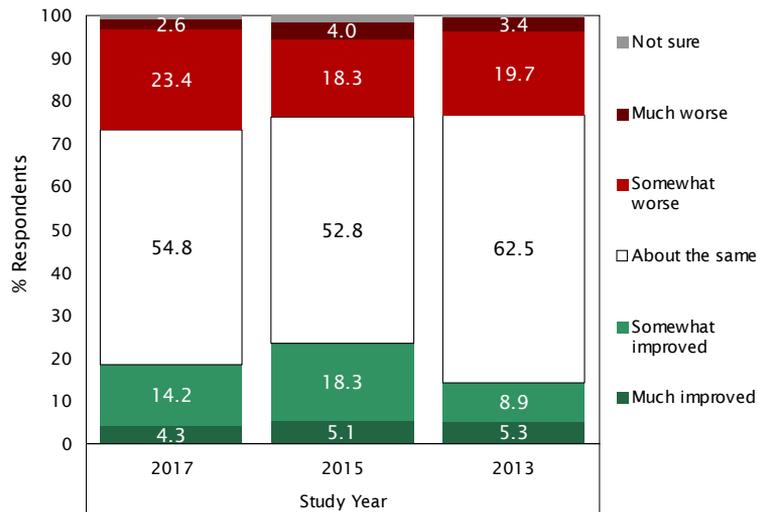


Having measured their perceptions of the general quality of life in Thousand Oaks as it is today (Question 2), the surveyed next asked respondents about perceived *trends* in the quality of life in the City over the past five years.³ Just over half of residents (55%) perceived little or no change in the quality of life in Thousand Oaks over the past five years, offering that it is about the same now as it was in the past (Figure 4). Among those who did perceive a change during this period, respondents were split, with 19% saying that the quality of life has improved in Thousand Oaks, and 26% indicating that it had declined over the past five years. There were no statistically significant changes from 2015.

3. Only respondents who indicated that they had lived in the City at least five years received Question 3.

Question 3 Over the past five years, would you say that the quality of life in Thousand Oaks has gotten better, stayed about the same, or gotten worse?

FIGURE 4 QUALITY OF LIFE IN PAST FIVE YEARS BY STUDY YEAR



For the interested reader, figures 5 and 6 display how the perceived trends in the quality of life in Thousand Oaks varied across resident subgroups. When compared with their respective counterparts, those who had lived in Thousand Oaks between 10 and 14 years, homemakers and retired individuals, residents between 55 and 64, and those who own their home were the most likely to perceive a negative trend in the quality of life in the city.

FIGURE 5 QUALITY OF LIFE IN PAST FIVE YEARS BY YEARS IN THOUSAND OAKS & EMPLOYMENT STATUS

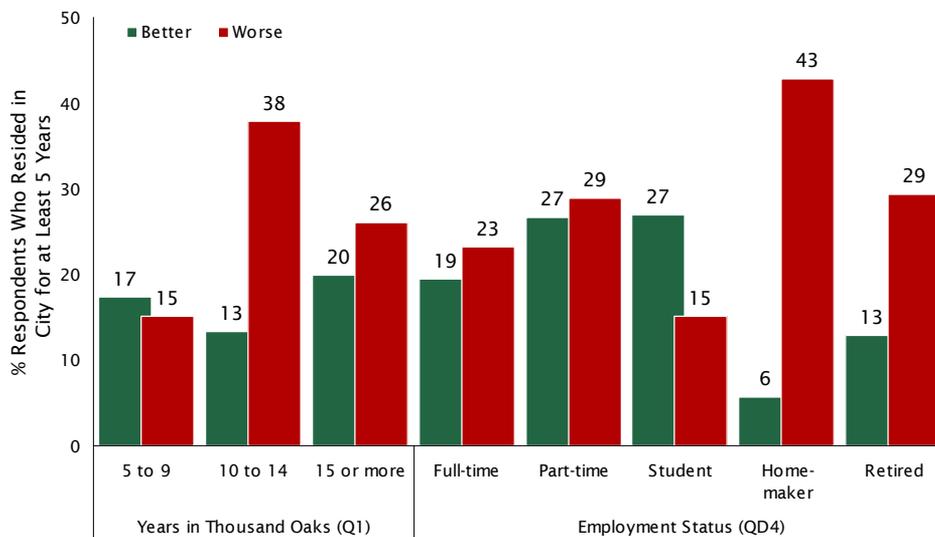
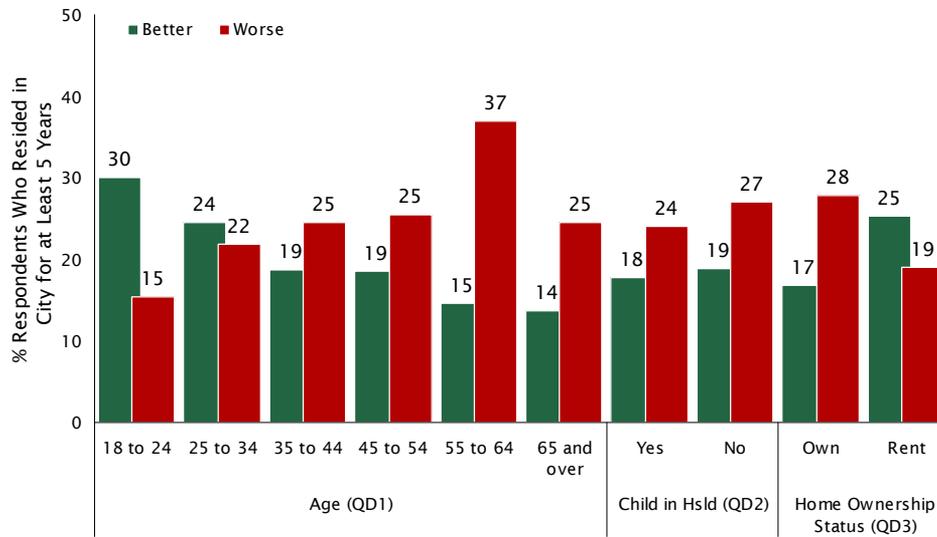


FIGURE 6 QUALITY OF LIFE IN PAST FIVE YEARS BY AGE, CHILD IN HSLD & HOME OWNERSHIP STATUS



WAYS TO IMPROVE QUALITY OF LIFE Respondents were next asked to indicate one thing the City could change to make Thousand Oaks a better place to live, now and in the future. This question was asked in an open-ended manner, which allowed respondents to mention any improvement 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 7.

Overall, the most common responses to this question were not sure/can't think of anything and no changes needed/everything is fine, collectively accounting for 21% of all responses. Both of these responses are indicative of a respondent who does not perceive any pressing issues or problems in the City that can be addressed by local government. Among specific changes that were mentioned, the most common were reducing traffic congestion (18%), limiting growth/preserving open space (12%), engaging in economic development (11%), improving the maintenance of streets and roads (9%), and increasing recreational facilities and programs (8%). Table 1 provides the top five responses to Question 4 in the 2017, 2015, 2013, and 2009 surveys, and demonstrates that traffic congestion has increased in perceived importance over the past eight years to the reach the top of the list in 2017.

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

FIGURE 7 CHANGES TO IMPROVE THOUSAND OAKS

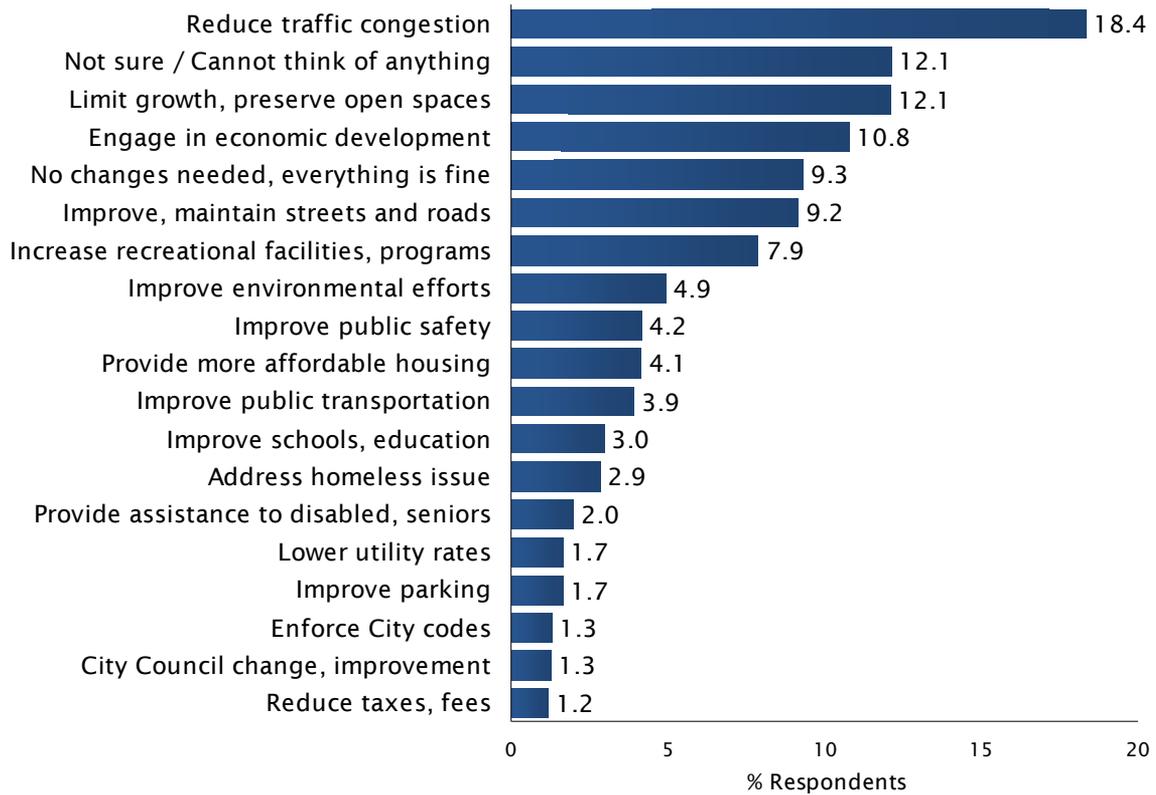


TABLE 1 TOP CHANGES TO IMPROVE THOUSAND OAKS BY STUDY YEAR

Study Year			
2017	2015	2013	2009
Reduce traffic congestion	Not sure / Cannot think of anything	No changes / Everything is okay	No changes / Everything is okay
Not sure / Cannot think of anything	Reduce traffic congestion	Not sure / Cannot think of anything	Not sure / Cannot think of anything
Limit growth / preserve open spaces	Improve maintain street roads	Limit growth / Preserve open space	Limit growth / Preserve open space
Engage in economic development	Limit growth / Preserve open space	Redevelop downtown areas	Redevelop downtown areas
No changes / Everything is okay	No changes / Everything is okay	Reduce traffic congestion	Reduce traffic congestion

CITY SERVICES

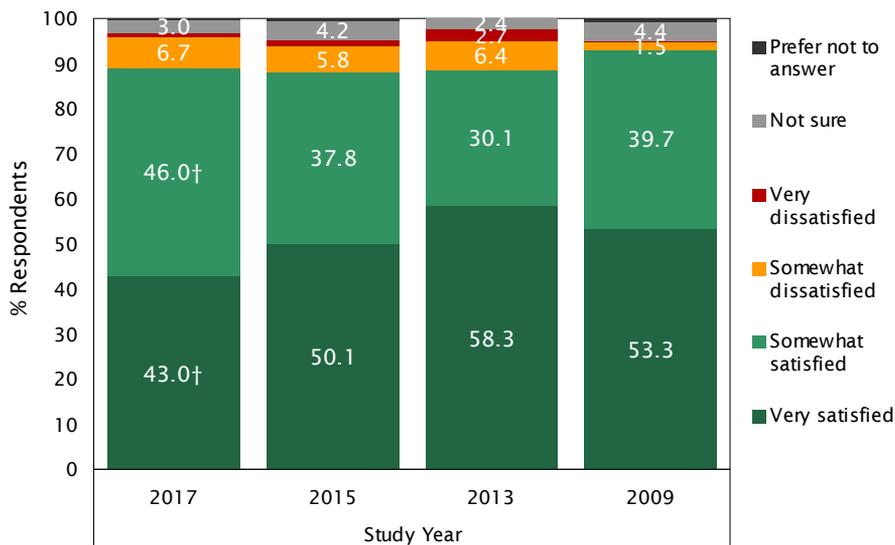
Having measured respondents' perceptions of the quality of life in Thousand Oaks, the survey next turned to assessing their opinions about the City's performance in providing various municipal services.

OVERALL SATISFACTION The first question in this series asked respondents to indicate if, overall, they were satisfied or dissatisfied with the job the City is doing to provide municipal 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 8, the vast majority (89%) of Thousand Oaks residents in 2017 indicated that they were satisfied with the City's efforts to provide municipal services, with 43% stating that they were *very* satisfied. Approximately 7% of respondents indicated that they were dissatisfied with the City's overall performance, and an additional 3% indicated that they were unsure or unwilling to share their opinion. When compared to the 2015 results, the overall percentage of residents who were satisfied in 2017 was virtually unchanged, although fewer respondents indicated that they were *very* satisfied, continuing a trend dating back to 2013.

Question 5 *Next, I would like to ask a series of questions about services provided by the City of Thousand Oaks. Generally speaking, are you satisfied or dissatisfied with the job the City of Thousand Oaks is doing to provide city services?*

FIGURE 8 OVERALL SATISFACTION BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2015 and 2017 studies.

Figures 9 and 10 on the next page show how ratings of the City's overall performance in providing municipal services varied by length of residence, employment status, age, presence of children in the home, as well as home ownership status. Although there was some variation in opinions across subgroups—e.g., residents who have lived in the City less than five years were much more likely than long-time residents (10+ years) to indicate that they were *very* satisfied

with the City’s performance—the most striking pattern in both figures is that the high levels of satisfaction exhibited by respondents as a whole (see Figure 8) were also shared by all resident subgroups. At least 85% of residents in *every* identified subgroup indicated that they were satisfied with the City’s overall performance in providing municipal services.

FIGURE 9 OVERALL SATISFACTION BY YEARS IN THOUSAND OAKS & EMPLOYMENT STATUS

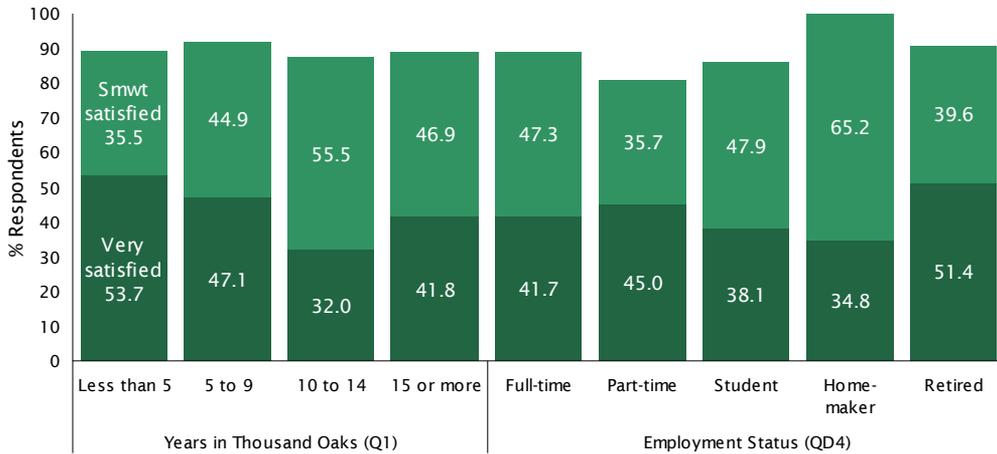
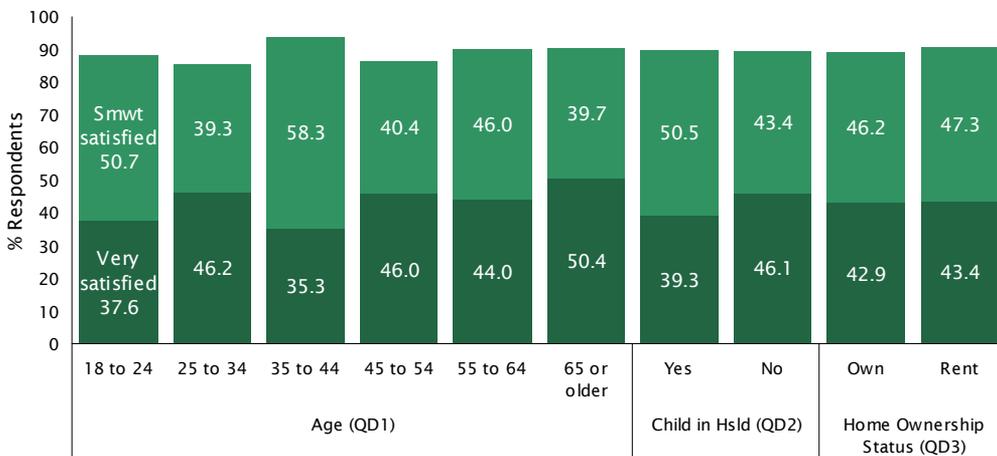


FIGURE 10 OVERALL SATISFACTION BY AGE, CHILD IN HSLD & HOME OWNERSHIP STATUS



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

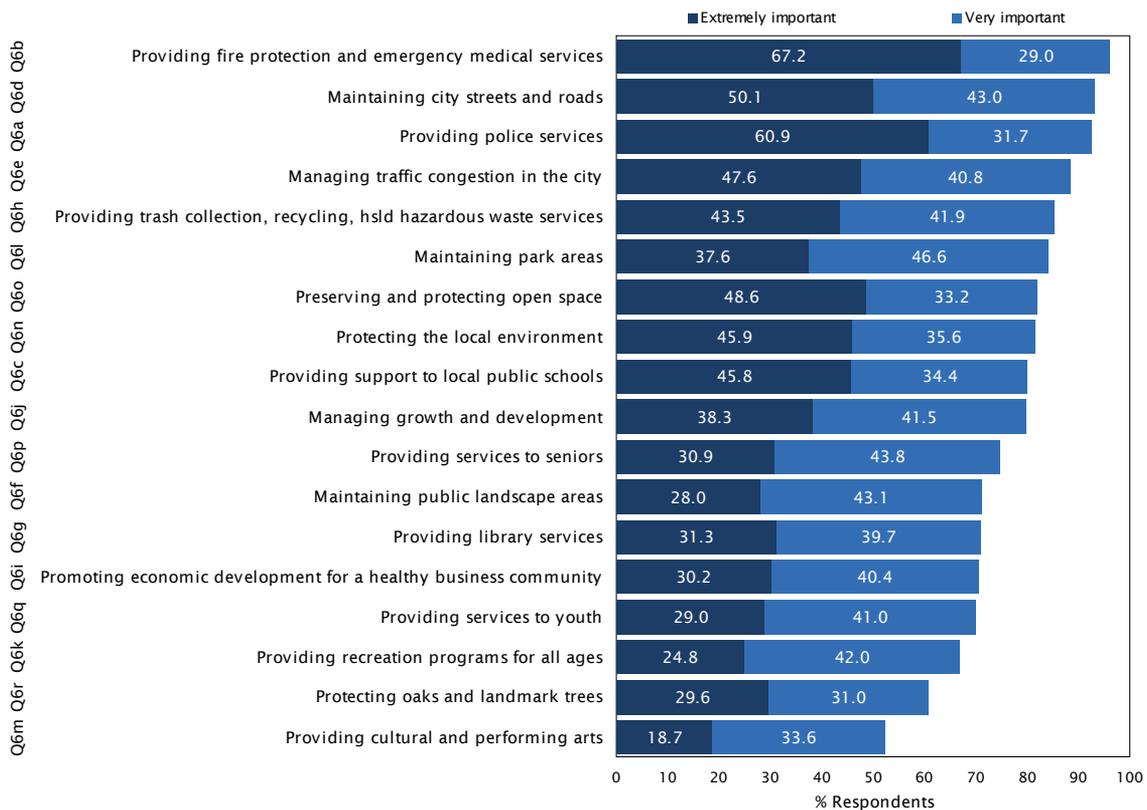
Figure 11 presents the services ranked by order of importance according to the proportion of respondents who rated a service as *at least* very important. Thousand Oaks residents rated providing fire protection and emergency medical services as the most important (96% extremely or

very important), followed by maintaining city streets and roads (93%), providing police service (93%), managing traffic congestion in the City (88%), and providing trash collection, recycling and household hazardous waste services (85%).

At the other end of the spectrum, providing cultural and performing arts (52%), protecting oaks and landmark trees (61%), and providing recreation programs for all ages (67%) were viewed as comparatively less important.

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 11 IMPORTANCE OF ISSUES



For the interested reader, Table 2 on the next page displays the percentage of respondents who indicated each service was *at least* very important in the 2017, 2015, 2013 and 2009 resident surveys, as well as the percentage change in importance during the past two years. When compared with the 2015 survey, there was a general trend of assigning higher importance to most services tested in 2017, with statistically significant increases for eight service areas.

TABLE 2 IMPORTANCE OF SERVICES BY STUDY YEAR

	Study Year				Change in Extremely + Very Important
	2017	2015	2013	2009	
Managing traffic congestion in the city	88.4	74.4	70.0	68.3	+14.0†
Managing growth and development	79.7	67.5	68.5	64.7	+12.2†
Maintaining public landscape areas	71.2	62.8	57.3	N/A	+8.3†
Providing recreation programs for all ages	66.8	59.3	65.2	59.0	+7.5†
Preserving and protecting open space	81.8	74.9	73.2	76.8	+6.9†
Promoting economic development	70.5	64.0	70.1	69.6	+6.5†
Providing services to seniors	74.7	68.4	N/A	N/A	+6.3†
Maintaining streets and roads	93.1	87.6	84.4	82.6	+5.5†
Providing library services	71.0	66.9	67.6	64.3	+4.1
Providing police services	92.6	88.6	87.9	85.8	+4.1
Providing services to youth	70.0	66.6	N/A	N/A	+3.4
Providing fire protection, emergency medical	96.2	92.8	94.7	N/A	+3.4
Protecting the local environment	81.5	78.4	74.5	72.5	+3.1
Providing cultural and performing arts	52.3	49.9	46.2	37.3	+2.4
Providing trash collection, recycling services	85.4	84.4	80.8	80.6	+0.9
Maintaining park areas	84.2	85.2	78.8	77.1	-1.1
Providing support to local public schools	80.1	82.0	77.7	N/A	-1.9
Protecting oaks and landmark trees	60.6	N/A	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2015 and 2017 studies.

Turning to the satisfaction component, Figure 12 on the next page sorts the same list of 18 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 (either satisfied or dissatisfied) are included in the figures. Those who did not have an opinion were removed from this analysis.⁴

At the top of the list (see Figure 12), respondents were most satisfied with the City’s efforts to provide fire protection and emergency medical services (98%), provide library services (95%), provide police services (95%), provide trash collection, recycling and household hazardous waste services (92%), and maintain park areas (92%). Respondents were less satisfied with the City’s efforts to manage traffic congestion in the City (62%), manage growth and development (76%), and promote economic development for a healthy business community (77%).

Table 3 provides the percentage of respondents who expressed satisfaction with each service tested in the past four surveys, as well as the percentage change in satisfaction during the past two years for each service, where applicable. Comparing the current survey with 2015, there were statistically significant decreases in satisfaction with eight of the services tested, most notably managing traffic congestion in the City (-11%).

4. The percentage of respondents who provided an opinion (either satisfied or dissatisfied) is presented in brackets beside the service label in the figure.

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 12 SATISFACTION WITH SERVICES

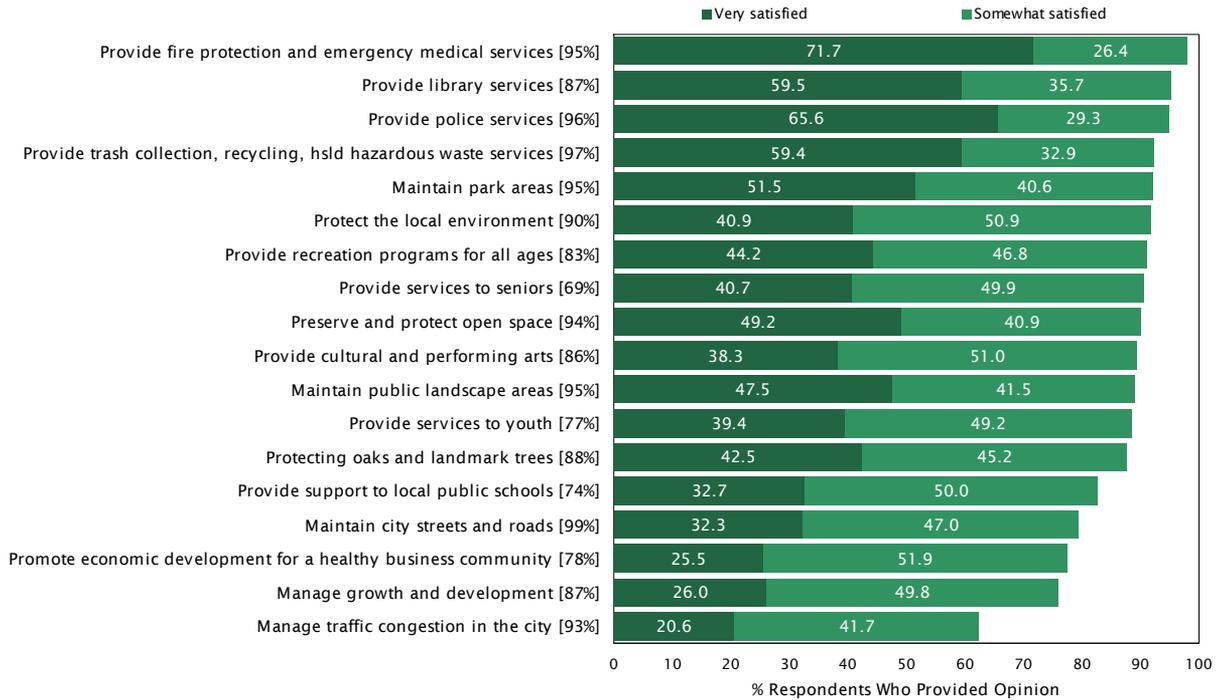


TABLE 3 SATISFACTION WITH SERVICES BY STUDY YEAR

	Study Year				Change in Satisfaction 2015 to 2017
	2017	2015	2013	2009	
Provide fire protection, emergency medical	98.1	97.4	98.4	N/A	+0.7
Provide library services	95.2	94.9	95.7	97.7	+0.3
Providing police services	90.6	91.3	N/A	N/A	-0.6
Provide police services	94.9	95.6	94.2	97.1	-0.7
Provide support to local public schools	82.7	83.8	87.1	N/A	-1.1
Preserve and protect open space	90.1	91.2	90.8	90.2	-1.1
Protect the local environment	91.8	93.3	92.9	94.0	-1.4
Provide cultural and performing arts	89.3	90.9	93.9	94.9	-1.6
Provide recreation programs for all ages	91.0	94.6	93.4	91.2	-3.7
Provide trash collection, recycling services	92.3	96.8	95.1	96.9	-4.5†
Maintain park areas	92.1	96.8	96.6	98.2	-4.7†
Maintain streets and roads	79.3	84.3	87.1	91.1	-5.0†
Provide services to youth	88.6	94.7	N/A	N/A	-6.1†
Promote economic development	77.4	84.6	84.4	87.6	-7.3†
Maintain public landscape areas	89.0	96.5	95.6	N/A	-7.6†
Manage growth and development	75.9	84.1	82.4	82.8	-8.3†
Manage traffic congestion in the city	62.4	73.2	79.6	83.2	-10.9†
Protecting oaks and landmark trees	87.7	N/A	N/A	N/A	N/A

† Statistically significant change (p < 0.05) between the 2015 and 2017 studies.



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.

INDIVIDUALIZED PRIORITY ANALYSIS Rather than rely on sample *averages* to conduct this analysis, True North has developed an *individualized* approach to identifying priorities that 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 the needs of its residents.⁵ Figure 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 very important.

5. 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 4 RESIDENT SERVICE NEEDS & PRIORITY MATRIX

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

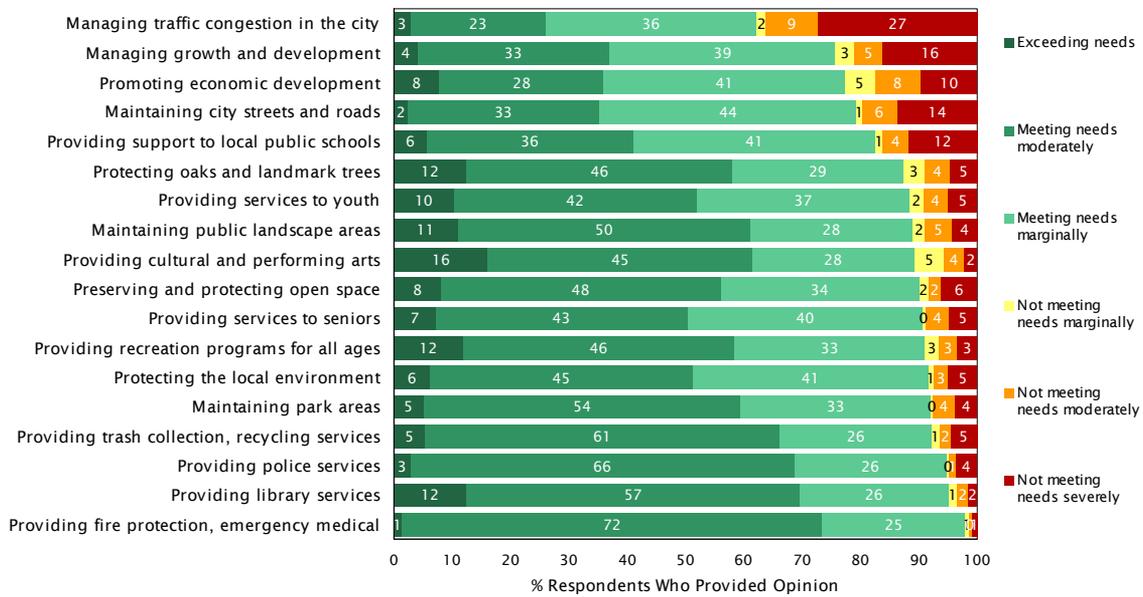
Using this framework, True North categorized respondents individually for each of the 18 services tested. For example, a respondent who indicated that managing traffic congestion was somewhat important and they were very satisfied with the City’s efforts in this service area would be categorized in the *exceeding needs* group for this service. The same respondent may be grouped in the *marginally not meeting needs* group for another service if they were somewhat dissatisfied with the City’s efforts to provide the service, but the service was viewed as only somewhat important.

Figure 13 on the next page presents each of the 18 services, along with the percentage of respondents grouped into each of the six possible categories. For ease of interpretation, the color-coding in Figure 13 is consistent with that presented in Figure 4. For example, in the service area of managing traffic congestion in the City, the City is exceeding the needs of 3% of respondents, moderately meeting the needs of 23% of respondents, marginally meeting the needs of 36% of respondents, marginally not meeting the needs of 2% of respondents, moderately not meeting the needs of 9% of respondents, and severely not meeting the needs of 27% of respondents.

Perhaps the most important pattern that is shown in the figure is that for half of the services tested the City is meeting the needs of at least 90% of residents. Moreover, for all but one service, the City is meeting the needs of at least three-quarters of residents.

Operating from the management philosophy that, all other things being equal, the City should focus on addressing 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, managing traffic congestion is the top priority, followed by managing growth and development, promoting economic development for a healthy business community, and maintaining city streets and roads.

FIGURE 13 RESIDENT SERVICE NEEDS



TREND IN INFRASTRUCTURE QUALITY Having measured residents’ opinions about the *current* status of city services and facilities, the survey next asked if respondents perceived a *trend* in the quality of the City’s infrastructure, which includes streets, sidewalks, utilities, parks and public facilities.⁶ As shown in Figure 14 on the next page, approximately half (49%) of residents surveyed perceived that the quality of the City’s infrastructure remained about the same during the past five years, whereas 32% felt that the quality had improved during this period and 18% perceived that it had declined. When compared with the 2015 survey, there were no statistically significant changes.

Figure 15 shows how perceived trends in the quality of the City’s infrastructure varied across subgroups of Thousand Oaks residents. When compared with their respective counterparts, those who had lived in the City between 5 and 9 years and those who commute outside of Thousand Oaks for their employment/education were the most likely to perceive a positive trend in the quality of the City’s infrastructure during the past five years.

6. Only respondents who indicated that they had lived in the City at least five years received Question 8.

Question 8 Over the past five years, would you say that the quality of the City's infrastructure such as streets, sidewalks, utilities, parks and public facilities has gotten better, stayed about the same, or gotten worse?

FIGURE 14 CITY INFRASTRUCTURE IN PAST FIVE YEARS BY STUDY YEAR

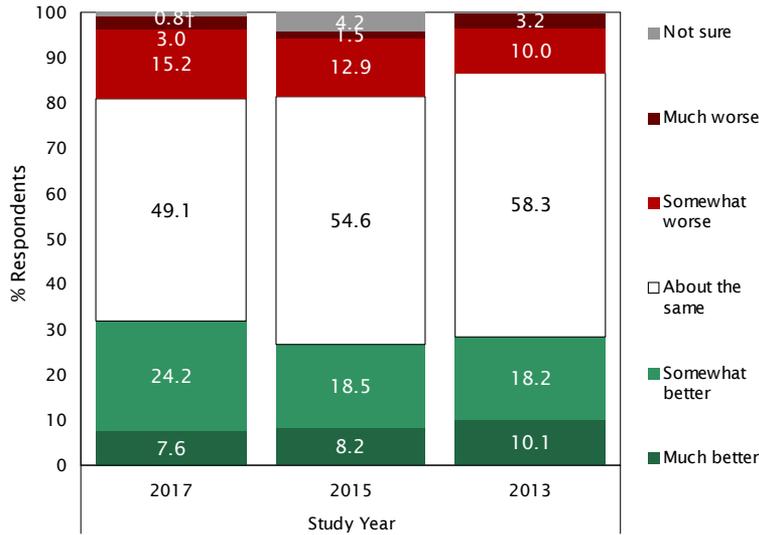
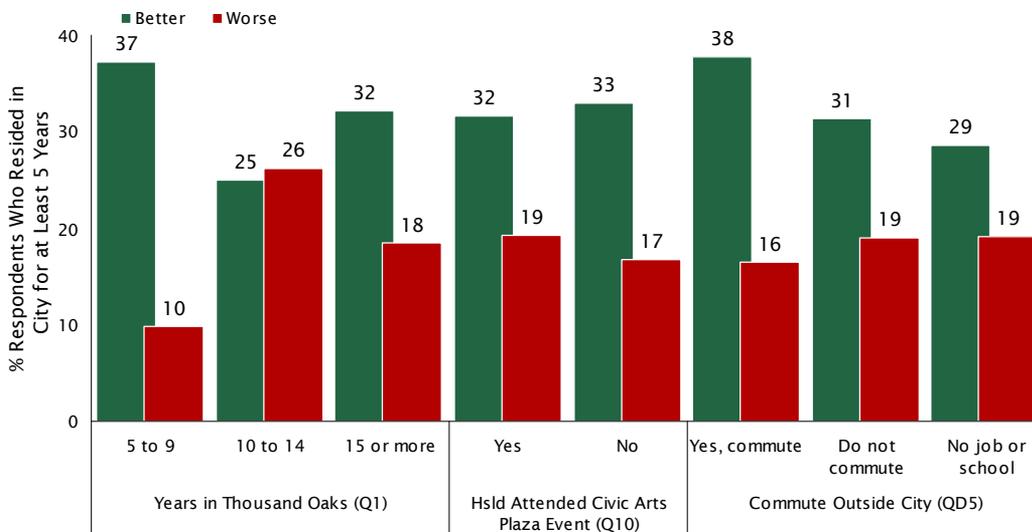


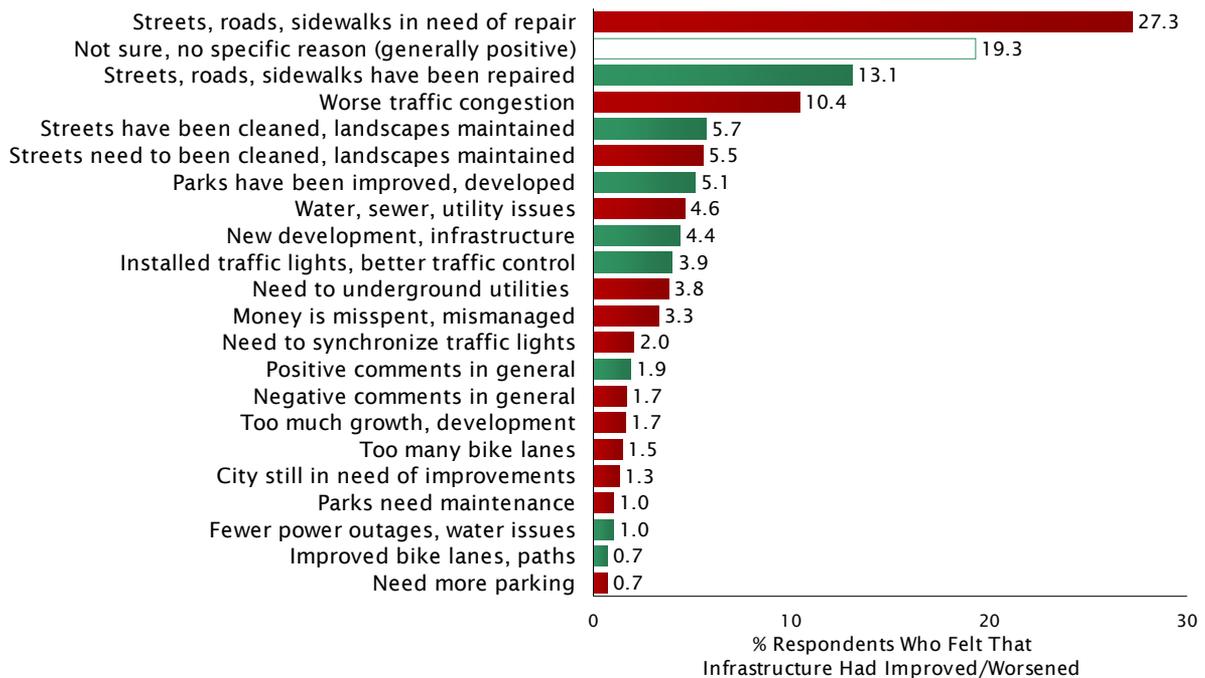
FIGURE 15 CITY INFRASTRUCTURE IN PAST FIVE YEARS BY YEARS IN THOUSAND OAKS, HSLD ATTENDED CIVIC ARTS PLAZA EVENT & COMMUTE OUTSIDE CITY



Those who perceived a trend in the quality of the City’s infrastructure—positive or negative—were next asked if there were particular reasons why they felt things had changed in this respect. Question 9 was asked in an open-ended manner to allow respondents the opportunity to mention any reasons that came to mind without being prompted by or restricted to a particular list of options. True North later review the verbatim responses and grouped them into the categories shown in Figure 16.

Question 9 *Are there particular reasons why you feel the City's infrastructure has gotten (better/worse)?*

FIGURE 16 REASONS FOR OPINION OF INFRASTRUCTURE QUALITY OVER PAST FIVE YEARS



Approximately 19% of respondents who perceived a trend in the quality of the City’s infrastructure were unable to provide a specific reason or example to support their opinion, although it’s worth noting that most of these residents held a generally positive opinion of the City’s infrastructure. Among the specific *positive* reasons offered (see the solid green bars), newly paved and repaired streets, roads, and sidewalks were the most commonly mentioned (13%), followed by reference to clean, well-maintained streets and landscapes (6%), improved and developed parks (5%), and new development/infrastructure (4%). Interestingly, the top response among those who perceived a *negative* trend in the quality of the City’s infrastructure (see red bars) was also the condition of streets, roads, and sidewalks and their need for repair (27%), followed by a worse traffic congestion (10%), and streets and landscapes in need of cleaning and maintenance (6%).

CIVIC ARTS PLAZA

Built by the City of Thousand Oaks in 1994, the Thousand Oaks Civic Arts Plaza offers a wide range of performing arts events throughout the year. The survey presented an opportunity to profile residents' attendance at shows or events held at the Civic Arts Plaza, as well as gauge their opinions about the variety and quality of events at the facility.

TICKETS AND ATTENDANCE The first question in this series asked respondents if they and/or a family member had purchased tickets and attended a show or event held at the Civic Arts Plaza during the prior 12-month period. As shown in Figure 17 below, half (50%) of residents surveyed in 2017 indicated that at least one member of their household had purchased tickets and attended a show/event at the Civic Arts Plaza during the period of interest, which is statistically unchanged from the 53% found in 2015.

Question 10 *The Thousand Oaks Civic Arts Plaza offers a wide range of performing arts events throughout the year. In the past 12 months, have you or a family member purchased tickets and attended a show or event held at the Civic Arts Plaza?*

FIGURE 17 HOUSEHOLD CIVIC ARTS PLAZA ATTENDANCE BY STUDY YEAR

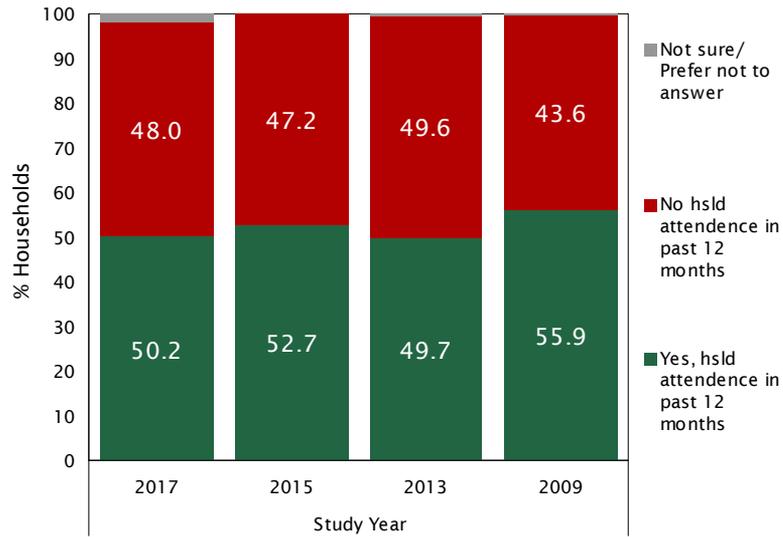
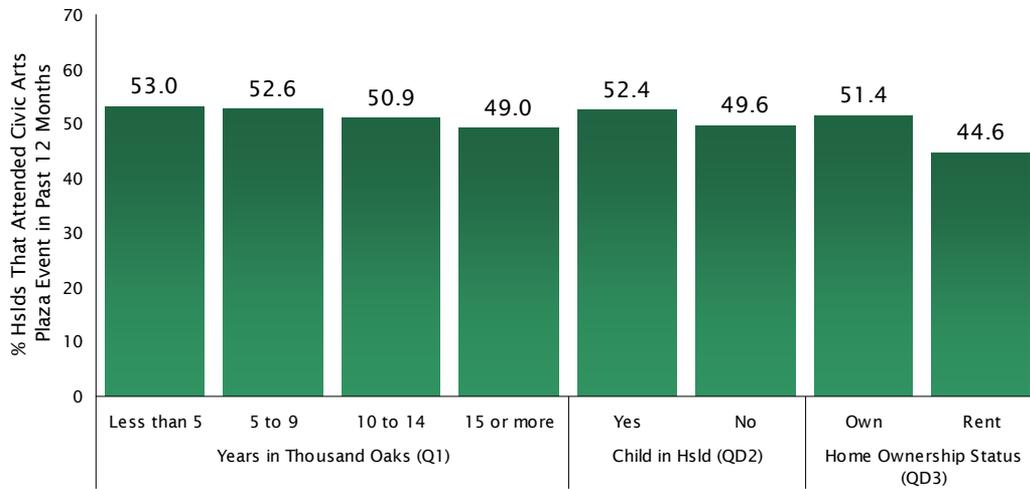


Figure 18 on the next page shows how attendance at a paid event or show varied by length of residence in the City, presence of children in the home, and homeownership status. When compared with their respective counterparts, rates of attendance were higher among newer residents, households with children, and those who own their home.

FIGURE 18 HOUSEHOLD CIVIC ARTS PLAZA ATTENDANCE BY YEARS IN THOUSAND OAKS, CHILD IN HSLD & HOME OWNERSHIP STATUS



Regardless of whether they had attended a paid show or event in the past 12 months, survey respondents were next asked to rate the *quality* and *variety* of shows and events at the Plaza, as well as the overall entertainment value for a show. Figure 19 presents the results to Question 11 for all respondents on the left side of the figure, and just for those respondents whose household had attended at least one event or show at the Civic Arts Plaza during the previous 12 months on the right. Approximately one-fifth of residents surveyed were unsure and did not provide ratings of the Civic Arts Plaza. Nevertheless, 66% of all respondents rated the quality of events and shows as excellent or good, 61% rated the variety of events and shows as excellent or good, and 55% used excellent or good to describe the overall entertainment value for a show. The comparable figures among those whose household had attended a show or event at the Plaza in the past year were considerably higher at 92%, 80%, and 77%, respectively.

Question 11 Overall, how would you rate the _____ at the Plaza? Would you say it is excellent, good, fair, poor or very poor?

FIGURE 19 RATING ASPECTS OF THE PLAZA

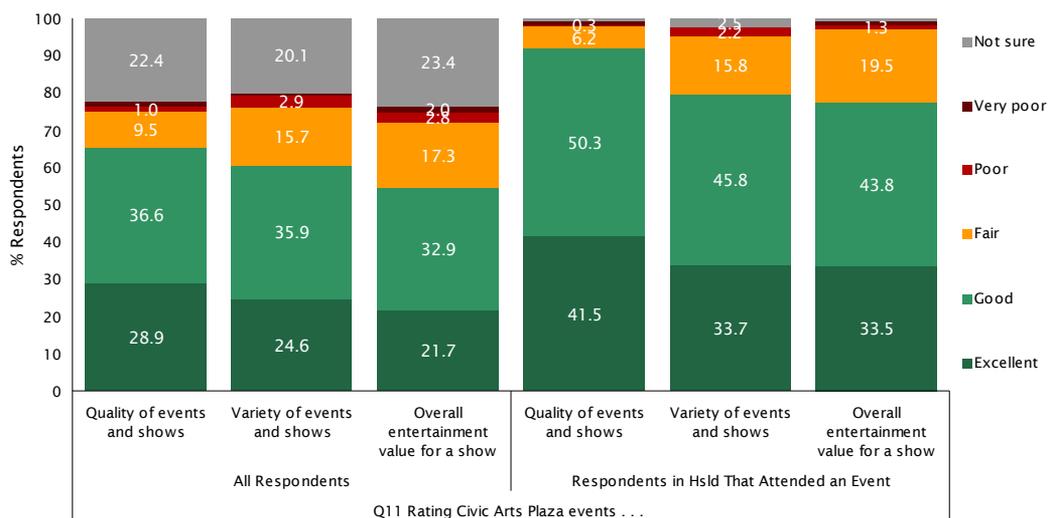


Table 5 displays the responses to Question 11 among all respondents (top rows) and just those whose household had attended an event at the Civic Arts Plaza in the past year (bottom rows) for the 2017, 2015, 2013 and 2009 studies, as well as the percentage change in responses between the most recent two surveys. Despite small positive and negative fluctuations, there were no statistically significant changes from the 2015 study.

TABLE 5 RATING ASPECTS OF THE PLAZA BY STUDY YEAR

		Study Year				Change in Excellent + Good Among Those Who Provided Opinion
		2017	2015	2013	2009	
All Respondents	Quality of events and shows	84.4	83.6	77.7	83.6	+0.8
	Variety of events and shows	75.7	79.4	73.3	78.7	-3.7
	Overall entertainment value for a show	71.3	75.9	74.7	81.1	-4.6
Respondents in Hsld That Attended an Event	Quality of events and shows	92.4	88.4	86.7	91.4	+4.0
	Variety of events and shows	81.6	81.9	81.4	87.0	-0.3
	Overall entertainment value for a show	77.9	81.6	84.7	89.8	-3.6

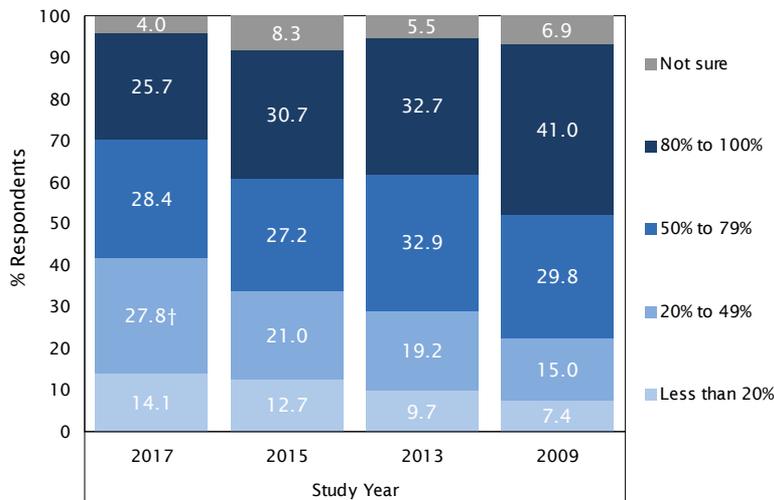
SHOPPING & ECONOMIC DEVELOPMENT

One of the challenges for any city is to create sustainable economic development initiatives that will support the tax base required for current and future needs. Naturally, the success and sustainability of future retail economic initiatives will depend in part on the shopping behaviors and preferences of Thousand Oaks residents. Businesses that meet these preferences will thrive, whereas those that do not will not succeed. Accordingly, the survey included three questions designed to identify residents' current shopping patterns, as well as their desire for new shopping and dining opportunities.

RETAIL SHOPPING HABITS The first question in this series asked respondents to identify the percentage of their household's retail shopping dollars that they spend in the City—excluding grocery shopping. Approximately 54% of households in 2017 indicated that they spend at least half of their household's retail shopping dollars within the City, with 26% spending at least 80% of their dollars within the City, and 28% spending between 50% and 79% of their retail dollars within the City (Figure 20). The trend since 2009, however, is that Thousand Oaks residents are spending a smaller percentage of their retail dollars in the City, with 17% fewer residents reporting that they spend at least half of their retail shopping dollars locally when compared with 2009.

Question 12 *Excluding grocery shopping, what percentage of your household's retail shopping dollars do you spend in the City of Thousand Oaks?*

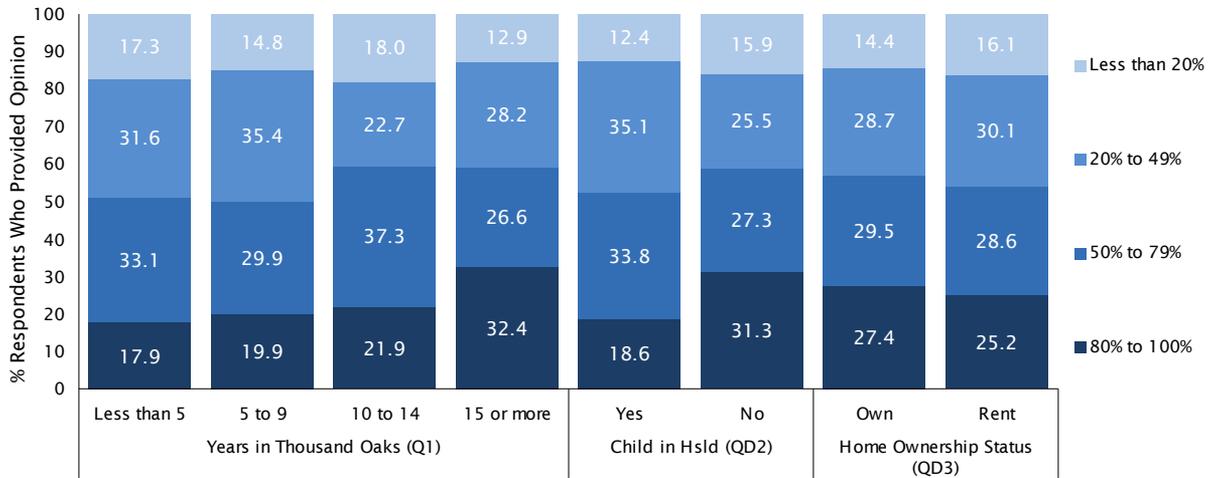
FIGURE 20 HOUSEHOLD RETAILS SHOPPING DOLLARS SPENT WITHIN THOUSAND OAKS BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2015 and 2017 studies.

Figure 21 on the next page shows how retail spending patterns varied by length of residence in Thousand Oaks, presence of a child in the home, and home ownership status. When compared to their respective counterparts, those who have lived in the City at 15 or more years and households without children were more likely to spend at least 80% of their retail shopping dollars within the City.

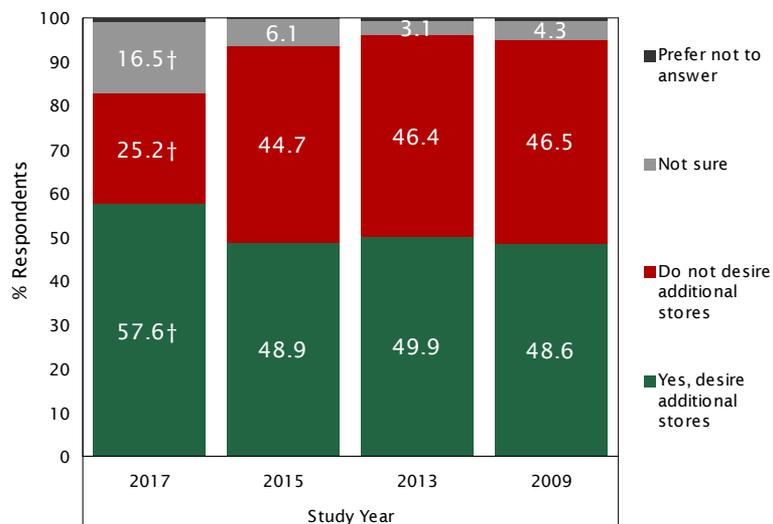
FIGURE 21 HOUSEHOLD RETAILS SHOPPING DOLLARS SPENT IN THOUSAND OAKS BY YEARS IN THOUSAND OAKS, CHILD IN HSLD & HOME OWNERSHIP STATUS



INTEREST IN ADDITIONAL STORES OR RESTAURANTS All residents were next asked to indicate whether, among the retail stores and restaurants their household currently visits outside of the City, there are any they would like to have available in Thousand Oaks. More than half (58%) of respondents in 2017 answered this question in the affirmative (see Figure 22), which represents a statistically significant increase from 2015. Interest in additional retail stores and restaurants was notably higher among those who have lived in the City fewer than 10 years, those between the ages of 25 and 44, households with children, those who own their home, and men (see figures 23 & 24 on the next page).

Question 13 *Thinking of the retail stores and restaurants that your household visits outside of the City, are there any that you would like to have available in Thousand Oaks?*

FIGURE 22 DESIRE ADDITIONAL STORES IN THOUSAND OAKS BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2015 and 2017 studies.

FIGURE 23 DESIRE ADDITIONAL STORES IN THOUSAND OAKS BY YEARS IN THOUSAND OAKS & AGE

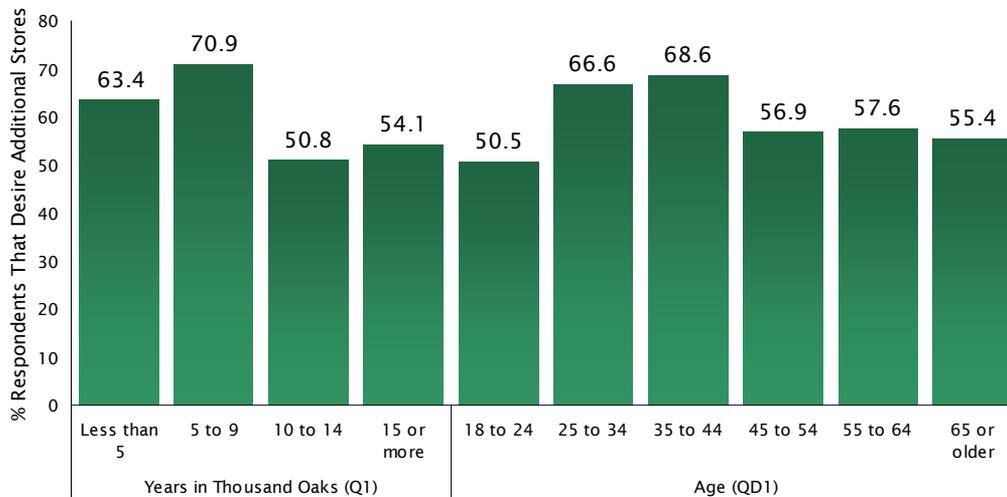
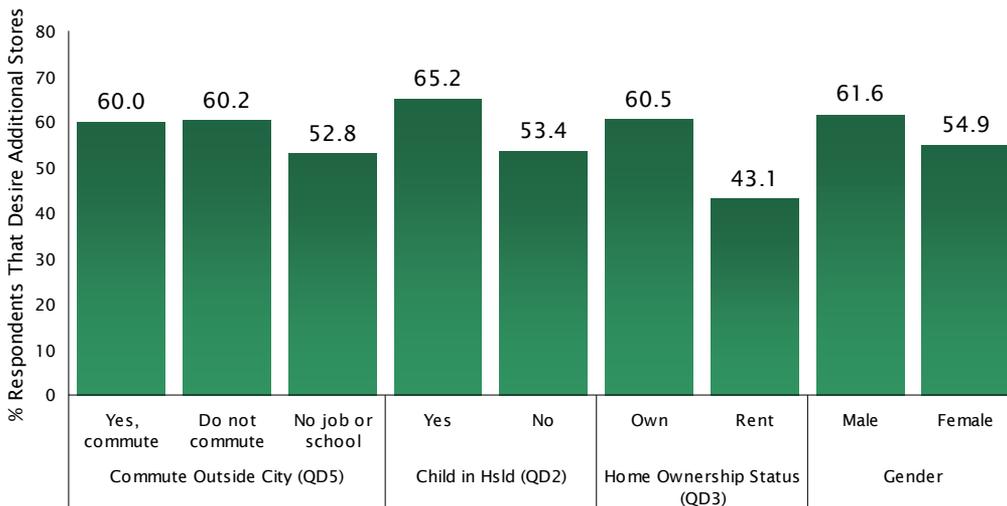


FIGURE 24 DESIRE ADDITIONAL STORES IN THOUSAND OAKS BY COMMUTE OUTSIDE CITY, CHILD IN HSLD, HOME OWNERSHIP STATUS & GENDER

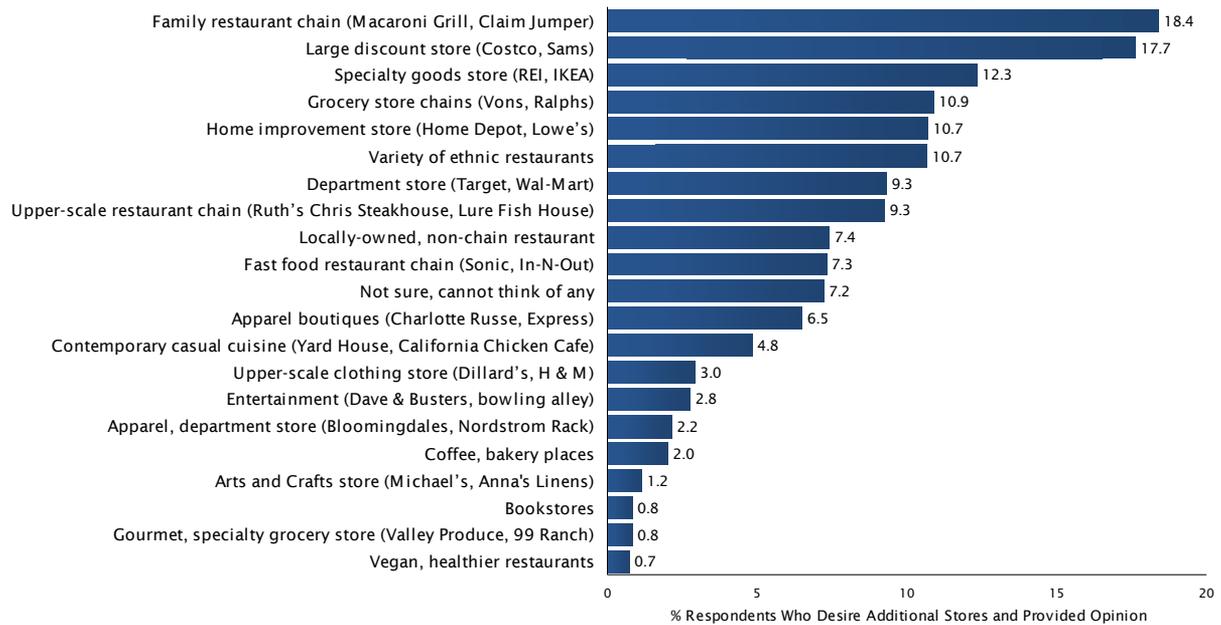


Those who were interested in new businesses in the City were next asked to name the one or two retail stores or restaurants they were most interested in having located in Thousand Oaks. This question was asked in an open-ended manner, allowing respondents to name any business that came to mind without being limited to a list of options. True North later reviewed the verbatim responses and grouped them into the broader categories shown in Figure 25, which also provides examples of each category in parentheses.

The most commonly mentioned type of business that residents would like to have located in the City are additional family restaurant chains such as Macaroni Grill and Claim Jumper and large discount stores such as Costco or Sam’s Club, each mentioned by 18% of residents who desire additional stores and restaurants, followed by specialty goods stores such as REI and IKEA (12%), grocery store chains (11%), home improvement stores (11%), and ethnic restaurants (11%).

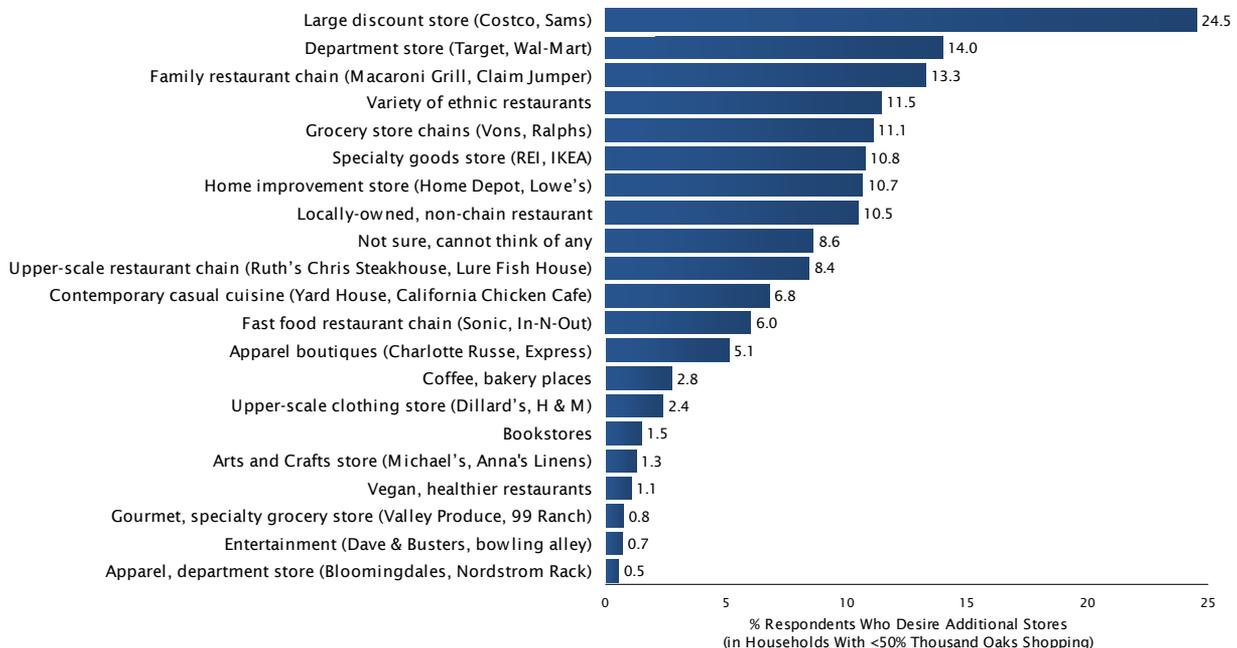
Question 14 *What are the names of the one or two stores or restaurants you would most like to have located in Thousand Oaks?*

FIGURE 25 ADDITIONAL STORES AND RESTAURANTS DESIRED



For the interested reader, Figure 26 shows that the results to Question 15 were somewhat different among households that indicated they currently spend *less* than 50% of their retail shopping dollars within Thousand Oaks. Among this target group, retail stores captured the top two slots, with large discount stores (25%) and department stores like Target and Wal-Mart (14%).

FIGURE 26 ADDITIONAL STORES AND RESTAURANTS DESIRED AMONG RESIDENTS IN HOUSEHOLDS WITH LESS THAN 50% SPENDING IN THOUSAND OAKS



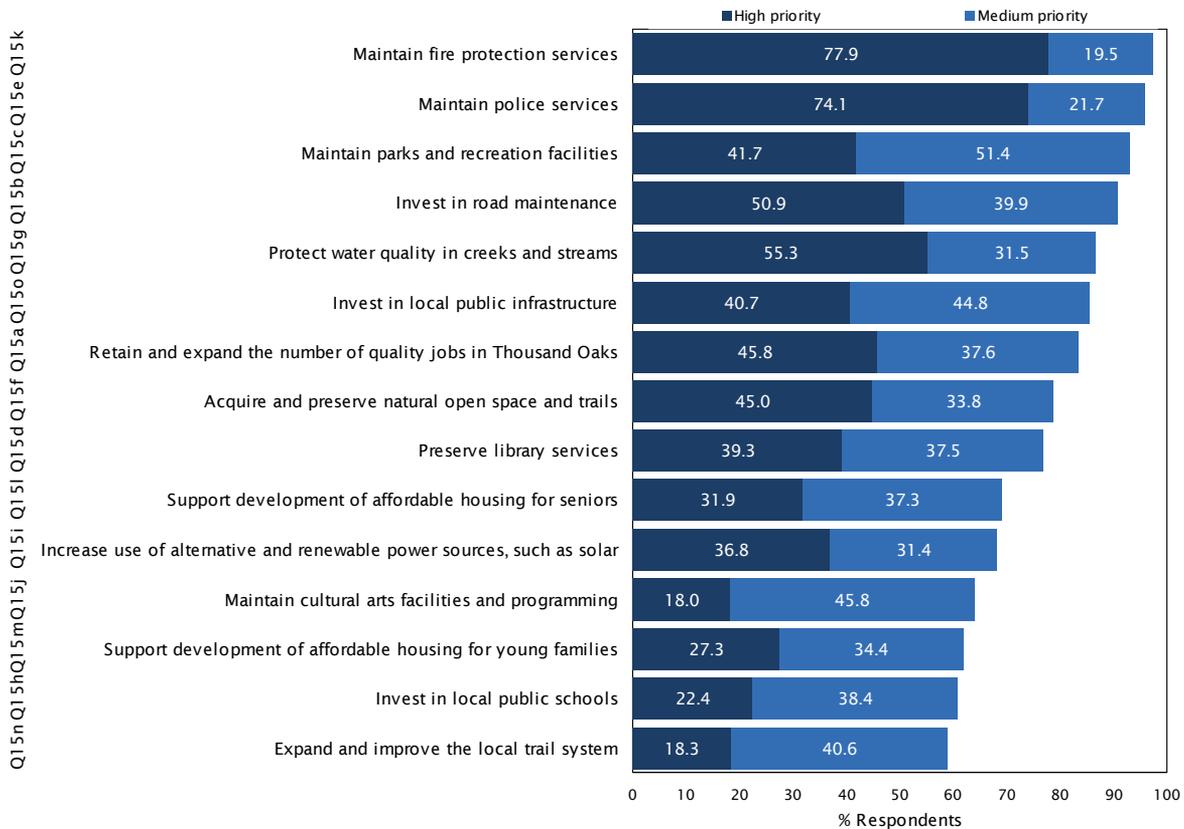
SPENDING PRIORITIES

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.

Question 15 was designed to provide Thousand Oaks with a reliable measure of how residents, as a whole, prioritize a variety of projects, programs, and improvements 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 projects and programs that may be desired by residents, respondents were asked whether each project or program shown in Figure 27 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.

Question 15 *The City of Thousand Oaks has limited financial resources to provide some of the projects and programs desired by residents. Because it can not fund every project and program, however, 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.*

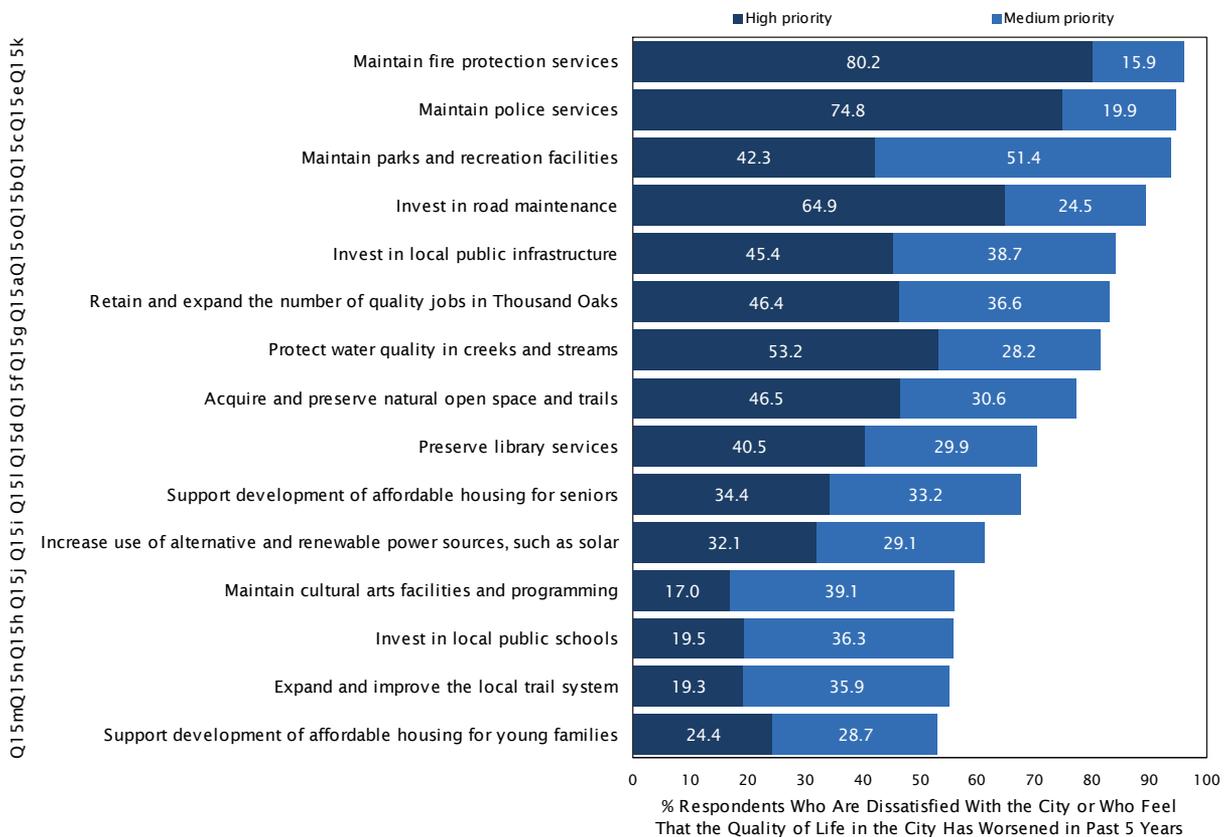
FIGURE 27 SPENDING PRIORITIES



The projects and programs are sorted in Figure 27 on the previous page from high to low based on the percentage of respondents who indicated that an item was *at least* a medium priority for future city spending. Among the projects and programs tested, maintaining fire protection services was assigned the highest priority (97% high or medium priority), followed by maintaining police services (96%), maintaining parks and recreation facilities (93%), investing in road maintenance (91%), and protecting water quality in creeks and streams (87%).

For the interested reader, Figure 28 presents the top priorities among the subset of residents who are dissatisfied with the City’s overall performance and/or felt that the quality of life in Thousand Oaks has declined during the past five years. It is worth noting that four of the top five priorities for this subgroup—maintaining fire protection services, maintaining police services, maintaining parks and recreation facilities, and investing in road maintenance—were the same as for residents in general.

FIGURE 28 SPENDING PRIORITIES AMONG THOSE WHO ARE DISSATISFIED WITH CITY OR WHO FEEL THAT QUALITY OF LIFE HAS WORSENERD IN PAST FIVE YEARS



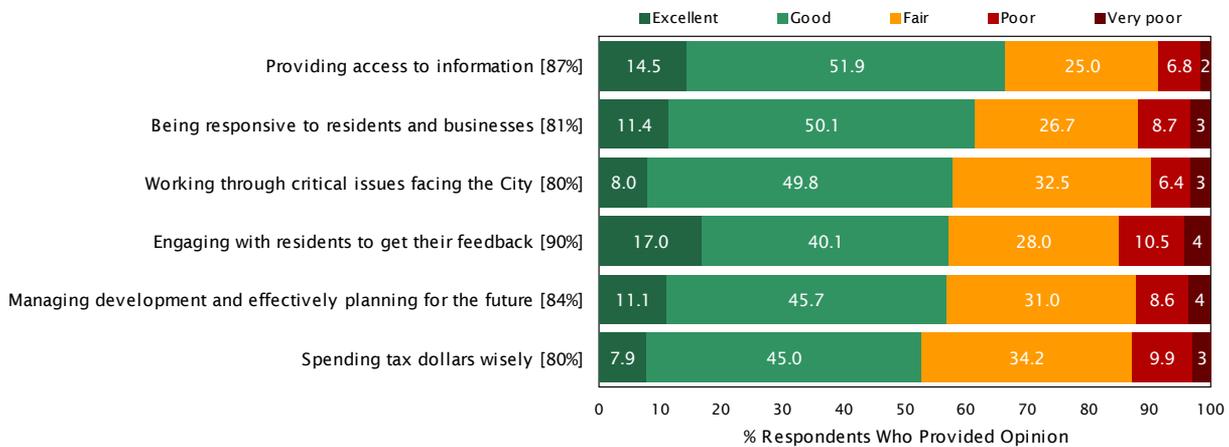
STAFF & GOVERNANCE

Although much of the survey focused on residents’ satisfaction with the City’s efforts to provide specific services, as with other progressive cities Thousand Oaks recognizes there is more to good local governance than simply providing satisfactory services. Do residents perceive that the City is responsive to residents’ needs? How well is the City engaging with its residents? Do residents feel that the City is doing a good job managing development and effectively planning for the future? Answers to questions such as these are as important as service-related questions 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 accessibility, responsiveness, fiscal accountability and effectively planning for the City’s future. The format of the question was straightforward: for each of the statements shown at the left of Figure 29, respondents were asked if they agreed or disagreed with the statement. Percentages shown in the figure are among those with an opinion.⁷

Question 16 For each of the items I read next, please tell me how good of a job you think the City of Thousand Oaks is doing. Here is the (first/next) one: _____. Would you say the City does an excellent, good, fair, poor or very poor job in this area?

FIGURE 29 RATING ASPECTS OF CITY GOVERNANCE



Among those with an opinion, the City was rated highest for its performance in providing access to information (66% excellent or good), followed by being responsive to residents and businesses (62%), working through critical issues facing the City (58%), engaging with residents to get their feedback (57%), managing development and effectively planning for the future (57%), and spending tax dollars wisely (54%). As shown in Table 6 on the next page, there was a general positive trend in opinions from 2015 to the current survey, with a significant increase in the percentage of respondents who felt the City is doing an excellent or good job being responsive to residents and businesses (+9%).

7. The percentage of respondents who provided an opinion for each statement is shown to the right of each statement in brackets.

TABLE 6 RATING ASPECTS OF GOVERNANCE BY STUDY YEAR

	Study Year			Change in Excellent + Good
	2017	2015	2013	
Being responsive to residents and businesses	61.5	52.9	55.4	+8.6†
Engaging with residents to get their feedback	57.1	51.1	45.2	+6.0
Spending tax dollars wisely	52.8	50.3	51.2	+2.5
Providing access to information	66.4	64.1	61.1	+2.3
Managing development and effectively planning for future *	56.8	56.3	59.1	+0.4
Working through critical issues facing the City	57.8	58.3	62.2	-0.5

† Statistically significant change ($p < 0.05$) between the 2015 and 2017 studies.

STAFF CONTACT The staff at the City of Thousand Oaks 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. More than one-third (37%) of respondents indicated that they had contacted Thousand Oaks staff at least once during the 12 months prior to the interview, which is in line with the results found in prior years (Figure 30). Interaction with City staff was most commonly reported by residents who had lived in the City between 10 and 14 years and residents at least 35 years of age, and those who own their home (see Figure 31).

Question 17 *In the past 12 months, have you been in contact with staff from the City of Thousand Oaks?*

FIGURE 30 CONTACT WITH STAFF IN PAST 12 MONTHS BY STUDY YEAR

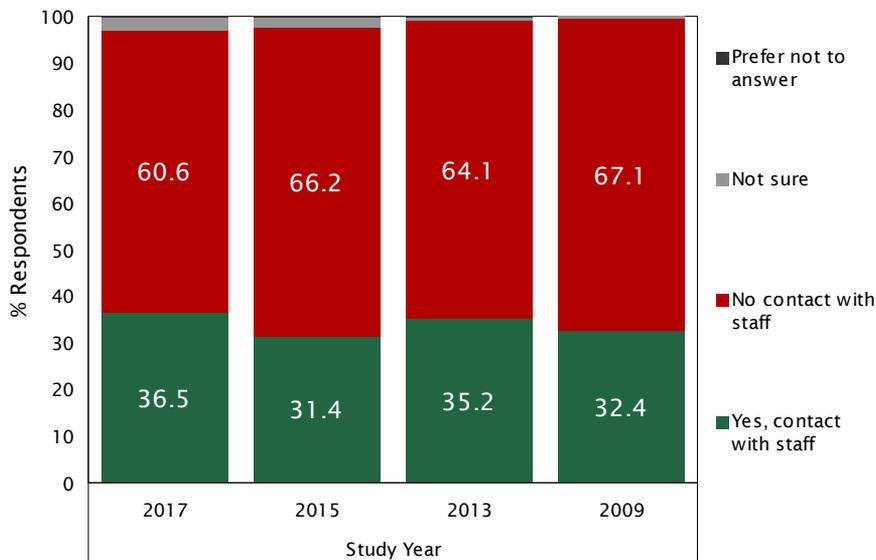
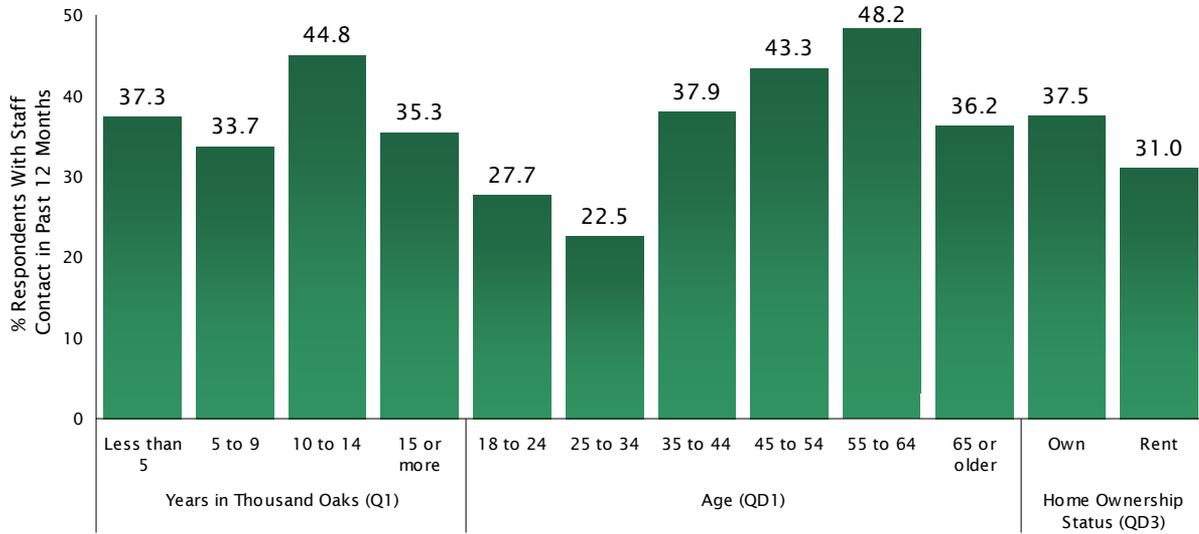


FIGURE 31 CONTACT WITH STAFF IN PAST 12 MONTHS BY YEARS IN THOUSAND OAKS, AGE & HOME OWNERSHIP STATUS



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 who expressed an opinion provided similarly high ratings for City staff on all three dimensions (Figure 32), with at least 9 out of 10 residents indicating that Thousand Oaks staff are very or somewhat helpful (90%), professional (94%), and accessible (96%). Although residents’ ratings of accessibility of staff decreased between 2015 and 2017, the difference was not statistically significant (see Table 7 on the next page).

Question 18 *In your opinion, was the staff at the City very _____, somewhat _____, or not at all _____?*

FIGURE 32 RATING ASPECTS OF CITY STAFF

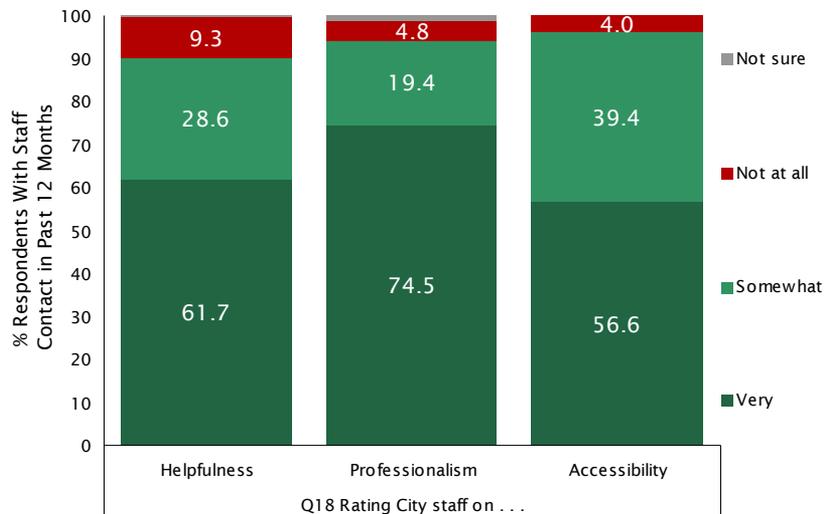


TABLE 7 RATING ASPECTS OF CITY STAFF BY STUDY YEAR

	Study Year				Change in % <i>Very</i>
	2017	2015	2013	2009	
Professionalism	74.5	73.3	75.3	66.4	+1.3
Helpfulness	61.7	60.4	68.5	65.5	+1.2
Accessibility	56.6	64.6	63.9	61.3	-7.9

CITY-RESIDENT COMMUNICATION

The importance of City communication with residents cannot be overstated. Much of a city’s success is shaped by the quality of information that is exchanged in both directions, from the City to the community and from the community to the City. This study is just one example of Thousand Oak’s efforts to enhance the information flow to the City to better understand citizens’ concerns, perceptions, and needs. In this section of the report, we present the results of several communication-related questions.

OVERALL SATISFACTION Question 19 of the survey asked residents to report their satisfaction with city-resident communication in the City. Overall, 70% of respondents in 2017 indicated they were satisfied with City’s efforts to communicate with residents through newsletters, Internet, Social Media, and other means (Figure 33). The remaining respondents were either dissatisfied with the City’s efforts in this respect (16%) or unsure of their opinion (14%). Between 2015 and 2017 there were no statistically significant changes in satisfaction with the City’s communication efforts, although we do see that since 2009 the proportion of residents reporting that they were *very* satisfied has declined substantially, whereas the proportion who were ‘not sure’ has increased. For the interested reader, figures 34 and 35 on the next page display how satisfaction with the City’s efforts to communicate with residents varied across resident sub-groups.

Question 19 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 33 SATISFACTION WITH COMMUNICATION BY STUDY YEAR

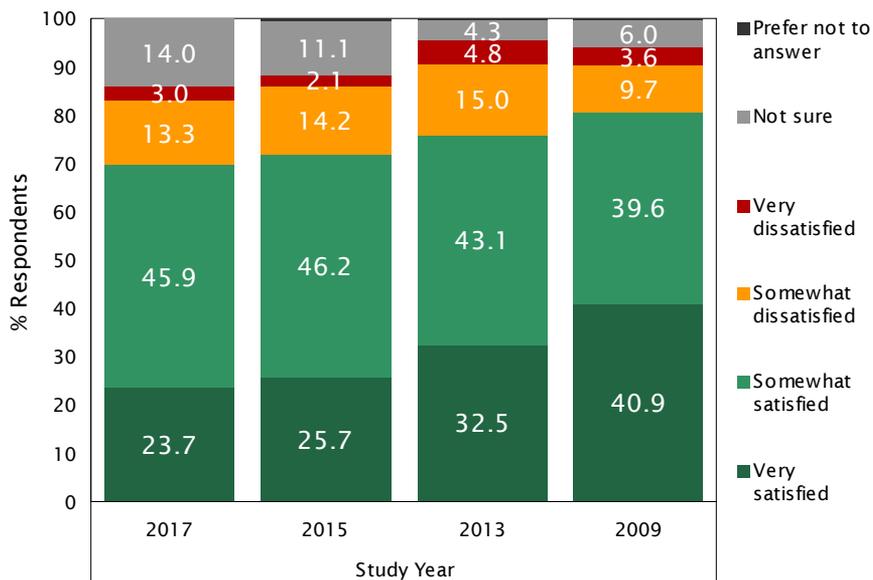


FIGURE 34 SATISFACTION WITH COMMUNICATION BY YEARS IN THOUSAND OAKS & EMPLOYMENT STATUS

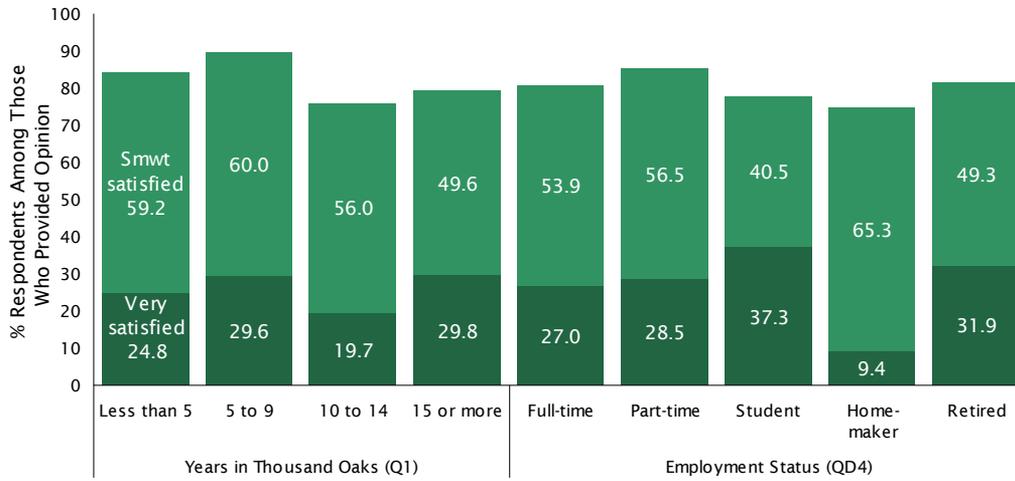
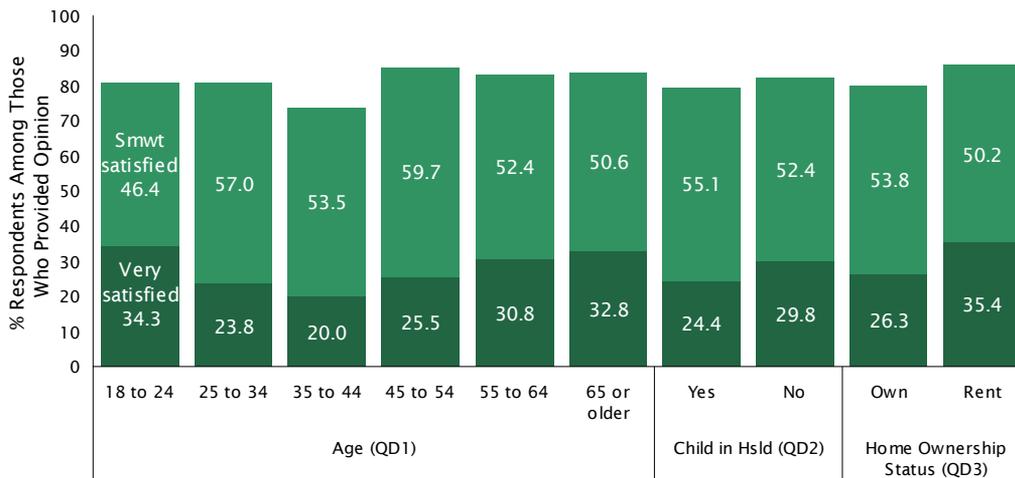


FIGURE 35 SATISFACTION WITH COMMUNICATION BY AGE, CHILD IN HSLD & HOME OWNERSHIP STATUS



INFORMATION SOURCES To help the City identify the most effective means of communicating with residents, it is helpful to understand what information sources they currently rely on for this type of information. In an open-ended manner, residents were asked to list the information sources they typically use to find out about Thousand Oaks news, information, and programming. Because respondents were allowed to provide up to three sources, the percentages shown in Figure 36 on the next page represent the percentage of residents who mentioned a particular source, and thus sum to more than 100.

The most frequently-cited source for City information was *The Acorn* newspaper (69%), followed by the *Ventura County Star* newspaper (25%), the City’s website (22%), and the Internet in general (19%). Other commonly mentioned sources included utility bill inserts (14%), social media including Facebook and Twitter (12%), friends/family/associates (11%), email notifications from the City (10%), and the Civic Arts Plaza Season Brochure (9%).

For the interested reader, Table 8 compares the top information sources cited in response to Question 21 in 2017, 2015, 2013, and 2009, whereas Figures 37 and 38 show how the information sources residents cited in 2017 varied by age, homeownership status, the presence of children in the home, and whether they were satisfied or dissatisfied with the City’s communication efforts.

Question 20 *What information sources do you use to find out about City of Thousand Oaks news, services, programs and events?*

FIGURE 36 SOURCE FOR THOUSAND OAKS INFO

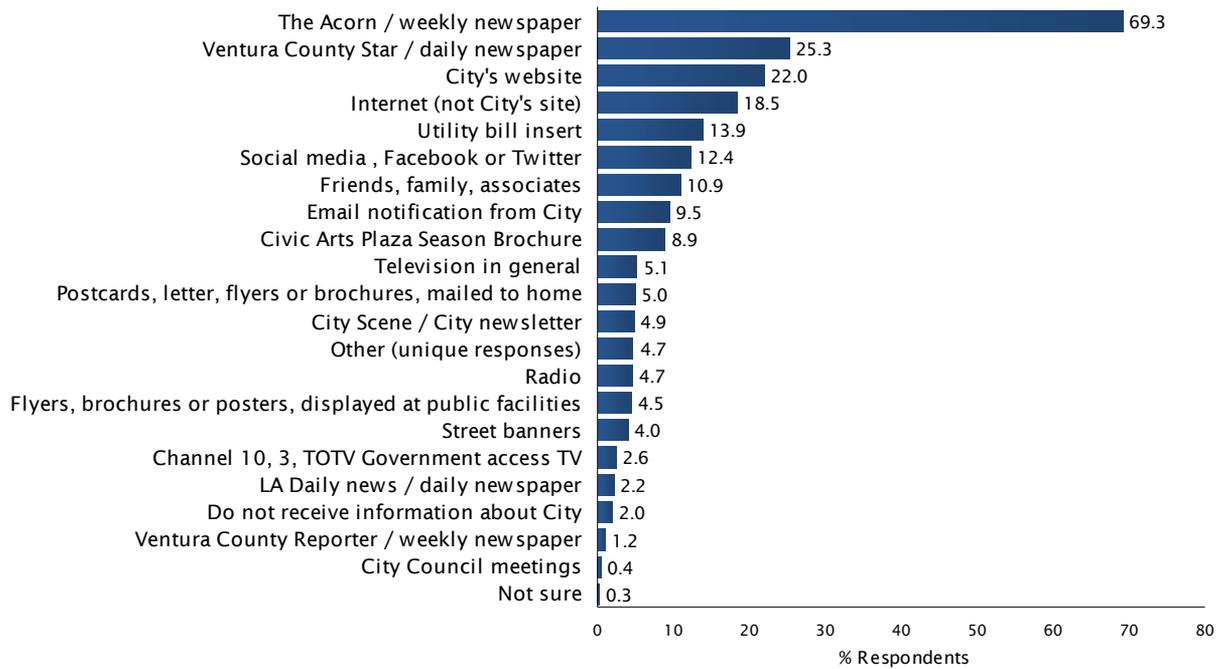


TABLE 8 TOP SOURCES FOR THOUSAND OAKS BY STUDY YEAR

	Study Year			
	2017	2015	2013	2009
The Acorn	The Acorn	Internet (general)	The Acorn	
Ventura County Star	Internet (general)	The Acorn	Ventura County Star	
City's website	City website	Ventura County Star	Internet (general)	
Internet (not City's site)	Ventura County Star	City website	City website	
Utility bill insert	TV (general)	Postcards, letters, brochures (mailed to home)	City Newsletter	

FIGURE 37 INFORMATION SOURCE CATEGORIES BY OVERALL & AGE

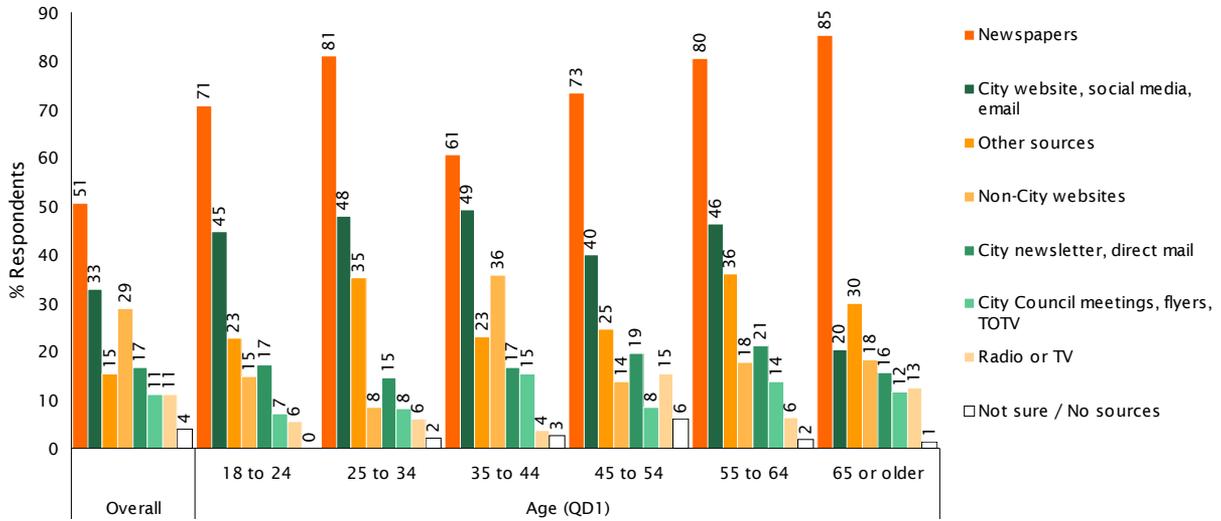
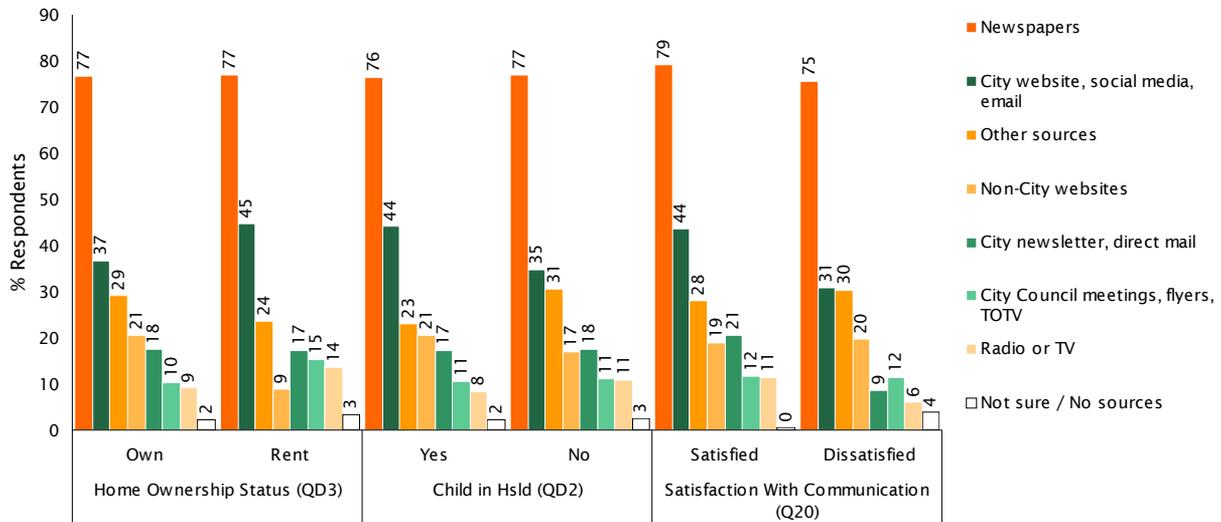


FIGURE 38 INFORMATION SOURCE CATEGORIES BY HOME OWNERSHIP STATUS, CHILD IN HSLD & SATISFACTION WITH COMMUNICATION



CITY WEBSITE Having identified the information sources that residents turn to *most* often, the survey next asked specifically whether the respondent had visited the City’s website during the 12 months prior to the interview. As shown in Figure 39 on the next page, approximately half (50%) of residents in 2017 reported that they had visited the site during this period, which is lower (though not significantly so) than the 57% recorded in 2015. Residents who have lived in the City between five and 14 years, those under 65 years of age, full-time employees, residents who live with children, and home owners were the most likely to state that they had visited the City’s website during the preceding 12 months (see Figures 40 & 41).

Question 21 *In the past 12 months, have you visited the City's website?*

FIGURE 39 VISITED CITY WEBSITE IN PAST 12 MONTHS BY STUDY YEAR

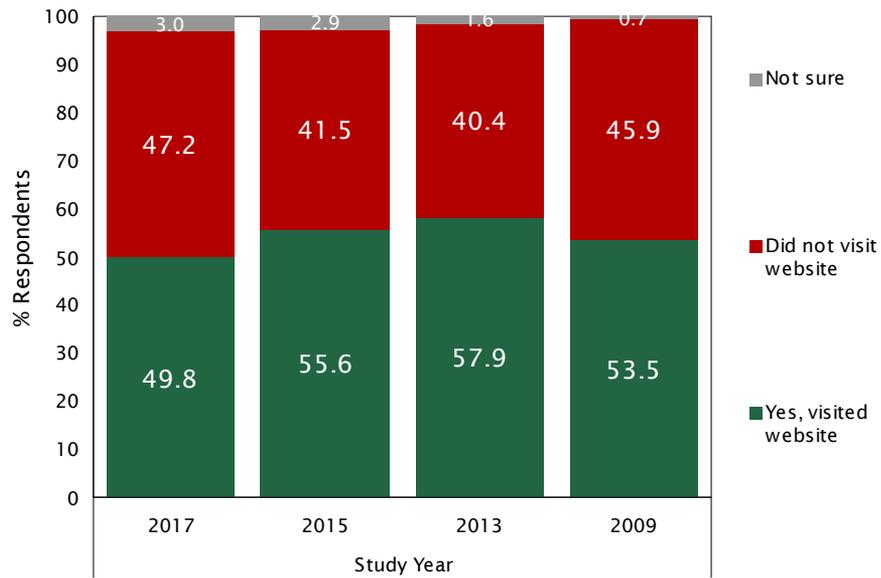


FIGURE 40 VISITED CITY WEBSITE IN PAST 12 MONTHS BY YEARS IN THOUSAND OAKS & AGE

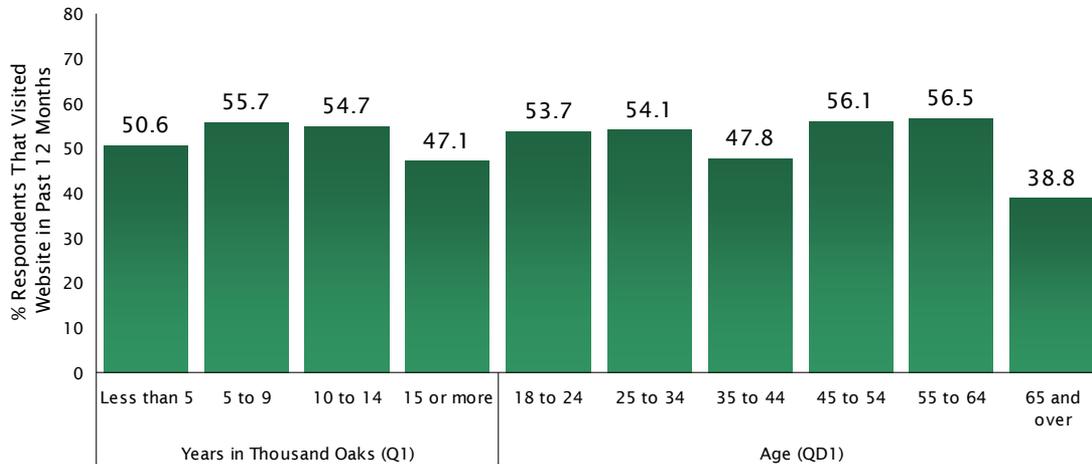
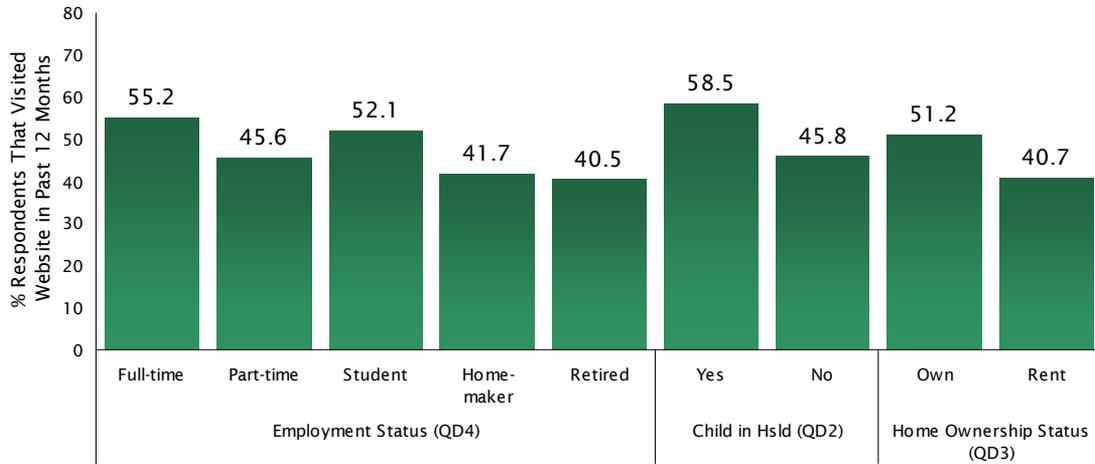


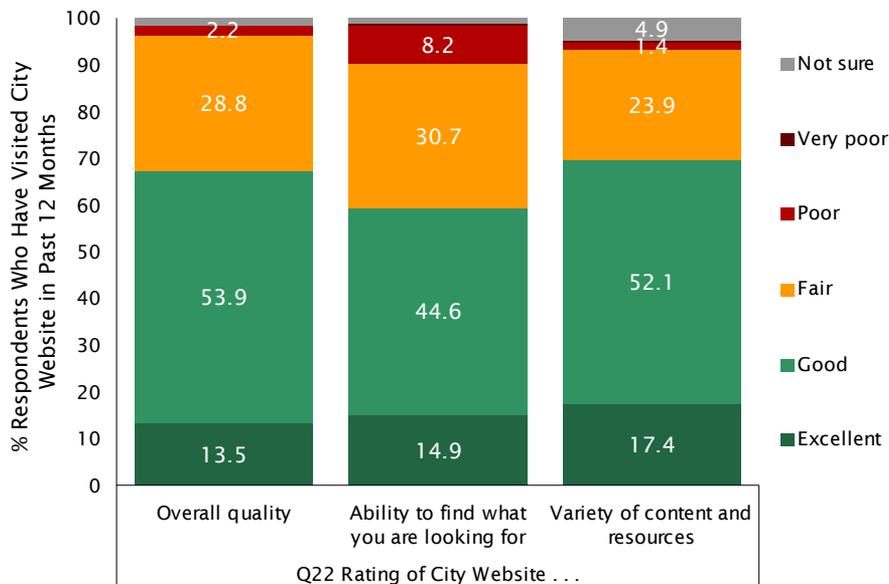
FIGURE 41 VISITED CITY WEBSITE IN PAST 12 MONTHS BY EMPLOYMENT STATUS, CHILD IN HSLD & HOME OWNERSHIP STATUS



Among those who had visited the City’s website during the past year, Question 22 asked that they rate the website on three performance dimensions: overall quality, ability to find what you are looking for, and variety of content and resources (Figure 42). All three dimensions received similar performance ratings, with at least six-in-ten respondents rating the overall quality (67%), ability to find what they are looking for (60%), and variety of content and resources (70%) as excellent or good.

Question 22 Overall, how would you rate: _____? Would you say it is excellent, good, fair, poor, or very poor?

FIGURE 42 RATING OF CITY WEBSITE



MEDICAL & NON-MEDICAL MARIJUANA

In 2015, the State of California passed a law creating a licensing process for commercial marijuana. In November 2016, California voters approved Proposition 64 to legalize the private, non-medical use of marijuana by adults. Proposition 64 was supported by 54% of Thousand Oaks residents.

Proposition 64 also placed a number of restrictions on the use of marijuana, including that it can't be consumed in a public place, within 1,000 feet of schools, daycare facilities or youth centers, or while driving or riding in a vehicle. Households are also limited to the cultivation of six (6) plants for personal use only. Under these laws, local cities have the option of restricting or prohibiting the commercial cultivation, manufacturing, sale, and distribution of marijuana within their boundaries.

OPINIONS ABOUT LOCAL MARIJUANA POLICIES After providing respondents with the aforementioned background information, Question 23 explored residents' opinions about the commercial cultivation of marijuana on private lands, the delivery of marijuana to private residences, as well as allowing marijuana dispensaries to locate within Thousand Oaks.

Question 23 *In 2015, the State of California passed a law creating a licensing process for commercial marijuana. In November 2016, California voters approved Proposition 64 to legalize the private, non-medical use of marijuana by adults. Proposition 64 was supported by 54% of Thousand Oaks residents. The law also placed a number of restrictions on the use of marijuana, including that it can't be consumed in a public place, within 1,000 feet of schools, daycare facilities or youth centers, or while driving or riding in a vehicle. Households are also limited to the cultivation of six (6) plants for personal use only. Under these laws, local cities have the option of restricting or prohibiting the commercial cultivation, manufacturing, sale, and distribution of marijuana within their boundaries. In your opinion, should the City of Thousand Oaks allow: -----?*

FIGURE 43 OPINION OF MEDICAL MARIJUANA DISPENSARIES

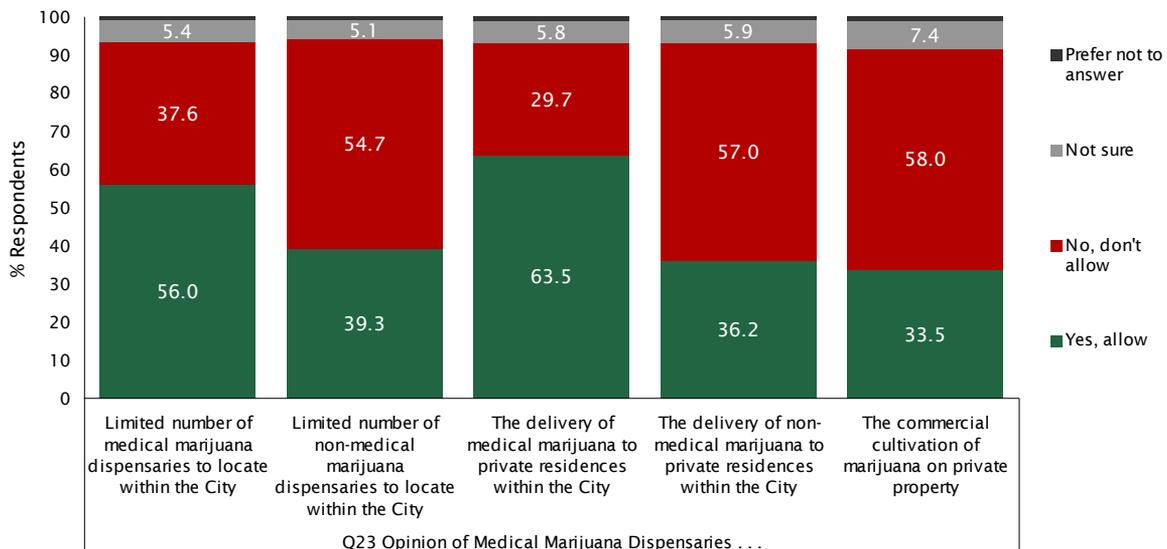


Figure 43 makes clear that community opinions regarding marijuana are conditioned by whether the use of the product is for *medical* or *non-medical* purposes. With respect to *medical* marijuana, a clear majority of Thousand Oaks residents support allowing a limited number of dispensaries to locate within the City (56%), and the delivery of marijuana to private residences within the City (64%). However, support for allowing *non-medical* marijuana dispensaries to locate within Thousand Oaks (39%) and the delivery of non-medical marijuana to private residences (36%) was confined to less than four-in-ten residents. Commercial cultivation of marijuana on private property was also unpopular, with just one-third (34%) of Thousand Oaks residents in support of allowing this practice in the City.

DEMOGRAPHICS & BACKGROUND INFO

Table 9 presents the key demographic and background information that was collected during the study. Because of the probability-based sampling methodology and screening protocols used in selecting the sample (see *Sample, Recruiting & Data Collection* on page 48), the results shown are representative of the universe of adults within the City of Thousand Oaks. The primary motivations for collecting the background and demographic information were to manage the sampling process and provide insight into how the results of the substantive questions of the survey vary by demographic characteristics (see crosstabulations in Appendix A for a full breakdown of each question).

TABLE 9 DEMOGRAPHICS OF SAMPLE BY STUDY YEAR

	Study Year			
	2017	2015	2013	2009
<i>Total Respondents</i>	567	400	400	400
QD1 Age	%	%	%	%
18 to 24	10.3	10.4	10.3	11.1
25 to 34	12.4	12.6	12.5	13.7
35 to 44	14.6	17.7	17.5	19.1
45 to 54	18.7	21.9	21.6	21.7
55 to 64	15.3	16.7	16.5	14.6
65 and over	22.7	18.8	18.6	15.6
Prefer not to answer	6.0	1.9	3.0	4.2
QD2 Child in Hsld				
Yes	33.0	42.1	36.0	47.3
No	62.6	55.3	63.5	51.9
Prefer not to answer	4.4	2.7	0.4	0.8
QD3 Home ownership status				
Own	81.0	74.9	79.6	81.8
Rent	16.5	21.6	18.3	16.2
Prefer not to answer	2.5	3.5	2.1	2.0
QD4 Employment status				
Full-time	50.2	48.0	50.4	50.0
Part-time	7.0	9.9	11.3	9.9
Student	4.3	5.7	6.6	6.9
Homemaker	5.9	8.8	8.8	6.7
Retired	24.7	21.2	17.8	18.5
In-between jobs	3.4	1.8	4.2	6.8
Prefer not to answer	4.5	4.6	0.9	1.2
QD5 Commute outside City for job / school				
Not employed or in school	38.5	36.4	31.7	33.2
Yes	36.2	36.3	38.5	34.4
No	23.0	26.5	29.8	32.0
Not sure	0.1	0.5	0.0	0.2
Prefer not to answer	2.2	0.4	0.0	0.2
QD6 Typical commute minutes to job / school				
No commute	63.8	63.7	61.5	65.6
20 or less	4.2	5.1	4.8	6.1
21 to 39	4.9	6.3	6.0	8.6
40 to 59	3.4	6.7	7.7	6.4
60 or more	20.7	16.1	18.4	11.9
Prefer not to answer	2.9	2.1	1.7	1.4
QD7 Gender				
Male	50.2	52.0	50.6	50.0
Female	45.1	48.0	49.4	50.0
Prefer not to answer	4.7	0.0	0.0	0.0



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 Thousand Oaks to develop a questionnaire that covered the topics of interest and avoided the 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 the 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.

Several questions asked in this study were presented only to a subset of respondents. For example, only respondents who had interacted with City staff in the past 12 months were asked about their interactions with staff. The questionnaire included with this report (see *Questionnaire & Toplines* on page 51) identifies skip patterns used during the interview to ensure that each respondent received the appropriate questions. It is also worth noting that most of the questions asked in the 2017 survey were tracked directly from the 2015 survey to allow the City to reliably track its performance over time.

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

SAMPLE, RECRUITING & DATA COLLECTION There were two separate samples (and phases) in the study. In the first phase, households were selected at random from the City of Thousand Oaks using a comprehensive database of residential addresses. Among these sampled households, the study employed a combination of mailed invitations, emailed invitations, and phone calls to recruit participation in the survey from 567 residents during the data collection period, which lasted from March 16 to April 3, 2017. Respondents were provided with the option to participate in the survey by telephone or online at a secure website hosted by True North. These interviews constitute the *Main* sample as they represent a statistically reliable, representative cross-section of the adult population in Thousand Oaks. The results discussed in the body of this report and the crosstabulations in Appendix A are based on the Main sample.

To accommodate the City's interest in allowing all residents the opportunity to participate in the study—not just those who were selected at random for the Main sample—the second phase of the study will make an identical (but separate) survey available to interested residents. All households in the City will be mailed a postcard inviting them to participate in the survey online at a secure web site. The postcards will include two unique personal identification numbers for each household, thereby preventing non-residents from accessing the online survey and preventing

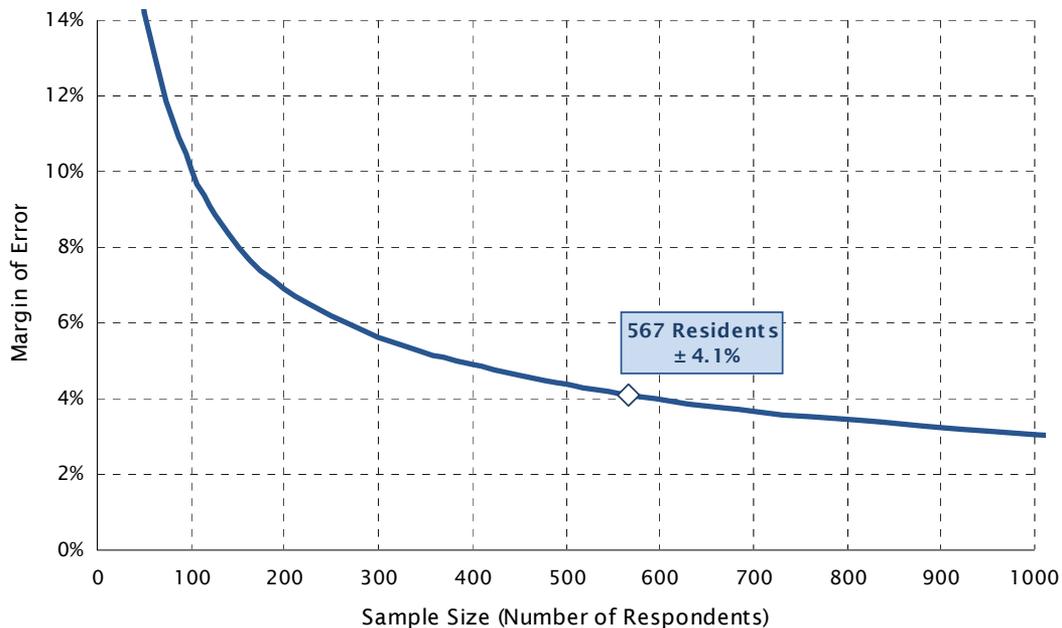
resident households from participating more than twice. Surveys collected in this second phase of the study will constitute the *Supplemental* sample.

The Supplemental sample will represent a non-random group of interested residents, and will not necessarily be representative of the City’s adult population. For this reason, the results for the Supplemental sample will be analyzed separately and presented in a separate set of crosstabulations. The question-by-question analysis, key findings and conclusions of this report are based on the Main sample findings only—not the Supplemental sample.

MARGIN OF ERROR DUE TO SAMPLING By using a random sample and monitoring the sample characteristics as data collection proceeded, True North ensured that the sample was representative of adult residents who live in the City of Thousand Oaks. The results of the sample can thus 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 567 adult residents for a particular question and what would have been found if all of the estimated 99,050 adult residents⁸ had been interviewed.

Figure 44 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response (i.e., $\hat{p} = 0.5$). For this survey, the maximum margin of error is $\pm 4.1\%$ for questions answered by all 567 respondents.

FIGURE 44 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by demographic characteristics such as age of the respondent and presence of children in the home. Figure 44 is thus useful for understanding how the maximum margin of error for a percentage

8. Sources: U.S. Census Bureau, 2010 Census Data and 2016 CA Department of Finance projections.

estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, and preparing frequency analyses and crosstabulations.

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 Thousand Oaks
Community Satisfaction Survey
Final Toplines
April 25, 2017

Section 1: Introduction to Study

Hi, my name is _____ and I'm calling on behalf of TNR, an independent public opinion research company. We're conducting a survey about important issues in Thousand Oaks and we would like to get your opinions.

If needed: This is a survey about community issues in Thousand Oaks - I'm NOT trying to sell anything and I won't ask for a donation.

If needed: The survey should take about 12 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.

Section 2: Land Line (only) Screener for Inclusion in the Study

SC1	To begin, are you at least 18 years of age?		
	1	Yes	Qualified
	2	No	Ask to speak to someone in household that is at least 18 years of age
	99	Prefer not to answer	Terminate

Section 3: Quality of Life

I'd like to begin by asking you a few questions about what it is like to live in the City of Thousand Oaks.

Q1	How long have you lived in Thousand Oaks?		
	1	Less than 1 year	3%
	2	1 to 4 years	13%
	3	5 to 9 years	14%
	4	10 to 14 years	13%
	5	15 years or longer	56%
	6	Do not live in Thousand Oaks	0%
	99	Prefer not to answer	0%

Q2	How would you rate the overall quality of life in Thousand Oaks? Would you say it is excellent, good, fair, poor or very poor?		
	1	Excellent	57%
	2	Good	39%
	3	Fair	4%
	4	Poor	0%
	5	Very poor	0%
	98	Not sure	0%
	99	Prefer not to answer	0%
<i>Only ask Q3 if Q1 = (3,4,5).</i>			
Q3	Over the past five years, would you say that the quality of life in Thousand Oaks has improved, stayed about the same, or gotten worse? <i>If better or worse, ask: Would that be much (improved/worse) or somewhat (better/worse)?</i>		
	1	Much improved	4%
	2	Somewhat improved	14%
	3	About the same	55%
	4	Somewhat worse	23%
	5	Much worse	3%
	98	Not sure	1%
	99	Prefer not to answer	0%
Q4	If the city government could change one thing to make Thousand Oaks a better place to live now and in the future, what change would you like to see? <i>Verbatim responses recorder and later grouped into categories shown below.</i>		
	Reduce traffic congestion		18%
	Not sure / Cannot think of anything		12%
	Limit growth, preserve open spaces		12%
	Engage in economic development		11%
	No changes needed, everything is fine		9%
	Improve, maintain streets and roads		9%
	Increase recreational facilities, programs		8%
	Improve environmental efforts		5%
	Improve public safety		4%
	Provide more affordable housing		4%
	Improve public transportation		4%
	Improve schools, education		3%
	Address homeless issue		3%
	Provide assistance to disabled, seniors		2%

Lower utility rates	2%
Improve parking	2%
Enforce City codes	1%
City Council change, improvement	1%
Reduce taxes, fees	1%
Improve communication, outreach efforts	1%
Address water issues, conservation	1%
Improve budgeting, spending	1%

Section 4: City Services

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

Q5	Generally speaking, are you satisfied or dissatisfied with the job the City of Thousand Oaks is doing to provide city services? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?							
	1	Very satisfied						43%
	2	Somewhat satisfied						46%
	3	Somewhat dissatisfied						7%
	4	Very dissatisfied						1%
	98	Not sure						3%
	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%	32%	6%	1%	0%	0%
B	Providing fire protection and emergency medical services		67%	29%	3%	1%	0%	0%
C	Providing support to local public schools		46%	34%	15%	4%	0%	0%
D	Maintaining city streets and roads		50%	43%	7%	0%	0%	0%
E	Managing traffic congestion in the city		48%	41%	10%	1%	0%	0%
F	Maintaining public landscape areas		28%	43%	26%	2%	0%	0%
G	Providing library services		31%	40%	22%	6%	1%	0%
H	Providing trash collection, recycling and household hazardous waste services		43%	42%	13%	2%	0%	0%
I	Promoting economic development for a healthy business community		30%	40%	25%	4%	1%	0%
J	Managing growth and development		38%	41%	17%	3%	0%	0%

Thousand Oaks Resident Survey

4/25/2017

K	Providing recreation programs for all ages	25%	42%	27%	6%	0%	0%
L	Maintaining park areas	38%	47%	15%	1%	0%	0%
M	Providing cultural and performing arts	19%	34%	38%	10%	0%	0%
N	Protecting the local environment	46%	36%	16%	2%	0%	0%
O	Preserving and protecting open space	49%	33%	15%	3%	0%	0%
P	Providing services to seniors	31%	44%	21%	3%	0%	1%
Q	Providing services to youth	29%	41%	24%	5%	1%	1%
R	Protecting oaks and landmark trees	30%	31%	29%	10%	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	63%	28%	4%	1%	4%	1%
B	Provide fire protection and emergency medical services	68%	25%	1%	1%	4%	1%
C	Provide support to local public schools	24%	37%	10%	2%	24%	2%
D	Maintain city streets and roads	32%	46%	15%	5%	1%	1%
E	Manage traffic congestion in the city	19%	39%	24%	11%	5%	1%
F	Maintain public landscape areas	45%	39%	9%	1%	4%	1%
G	Provide library services	51%	31%	3%	1%	12%	2%
H	Provide trash collection, recycling and household hazardous waste services	58%	32%	6%	2%	2%	1%
I	Promote economic development for a healthy business community	20%	41%	13%	4%	20%	2%
J	Manage growth and development	23%	44%	15%	6%	11%	1%
K	Provide recreation programs for all ages	37%	39%	6%	1%	15%	1%
L	Maintain park areas	49%	39%	6%	1%	5%	1%
M	Provide cultural and performing arts	33%	44%	8%	1%	12%	2%
N	Protect the local environment	37%	46%	6%	1%	9%	2%
O	Preserve and protect open space	46%	38%	8%	2%	5%	1%
P	Provide services to seniors	28%	34%	6%	1%	29%	2%
Q	Provide services to youth	30%	38%	7%	2%	21%	2%
R	Protect oaks and landmark trees	38%	40%	9%	2%	9%	2%
<i>Only ask Q8 and Q9 if Q1 = (3,4,5).</i>							

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Q8	Over the past five years, would you say that the quality of the City's infrastructure such as streets, sidewalks, water, sewer, public landscaping and public facilities has improved, stayed about the same, or gotten worse? <i>If better or worse, ask: Would that be much (improved/worse) or somewhat (improved/worse)?</i>			
	1	Much improved	8%	Ask Q9
	2	Somewhat improved	24%	Ask Q9
	3	About the same	49%	Skip to Q10
	4	Somewhat worse	15%	Ask Q9
	5	Much worse	3%	Ask Q9
	98	Not sure	1%	Skip to Q10
	99	Prefer not to answer	0%	Skip to Q10
Q9	Are there particular reasons why you feel the City's infrastructure has (improved/gotten worse)? <i>If yes, ask: Please describe them. Verbatim responses recorder and later grouped into categories shown below.</i>			
		Streets, roads, sidewalks in need of repair	27%	
		Not sure, no specific reason (generally positive)	19%	
		Streets, roads, sidewalks have been repaired	13%	
		Worse traffic congestion	10%	
		Streets have been cleaned, landscapes maintained	6%	
		Streets need to be cleaned, landscapes maintained	6%	
		Parks have been improved, developed	5%	
		Water, sewer, utility issues	5%	
		New development, infrastructure	4%	
		Installed traffic lights, better traffic control	4%	
		Need to underground utilities	4%	
		Money is misspent, mismanaged	3%	
		Need to synchronize traffic lights	2%	
		Positive comments in general	2%	
		Negative comments in general	2%	
		Too much growth, development	2%	
		Too many bike lanes	1%	
		City still in need of improvements	1%	
		Parks need maintenance	1%	
		Fewer power outages, water issues	1%	
		Improved bike lanes, paths	1%	
		Need more parking	1%	

Section 5: Civic Arts Plaza

The Thousand Oaks Civic Arts Plaza offers a wide range of performing arts shows, programs and events throughout the year.

Q10 In the past 12 months, have you or a family member purchased tickets and attended a show or event held at the Civic Arts Plaza?

1	Yes	50%
2	No	48%
98	Not sure	2%
99	Prefer not to answer	0%

Q11 Overall, how would you rate the: _____ at the Plaza? Would you say it is excellent, good, fair, poor or very poor?

<i>Read in Order</i>		Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
A	Quality of events and shows	29%	37%	10%	1%	2%	18%	5%
B	Variety of events and shows	25%	36%	16%	3%	1%	16%	5%
C	Overall entertainment value for a show	22%	33%	17%	3%	2%	18%	5%

Section 6: Shopping & Economic Development

Next, I'd like to ask you a few questions about your shopping preferences.

Q12 Excluding grocery shopping, what percentage of your household's retail shopping dollars do you spend in the City of Thousand Oaks? *If they are uncertain, ask them to estimate.*

1	Less than 10%	5%
2	10% to 19%	9%
3	20% to 29%	9%
4	30% to 39%	11%
5	40% to 49%	8%
6	50% to 59%	10%
7	60% to 69%	8%
8	70% to 79%	11%
9	80% to 89%	12%
10	90% to 100%	14%
98	Not sure	3%
99	Prefer not to answer	1%

Q13	Thinking of the retail stores and restaurants that your household visits <u>outside</u> of the City, are there any that you would like to have available in Thousand Oaks?			
	1	Yes	58%	Ask Q14
	2	No	25%	Skip to Q15
	98	Not Sure	16%	Skip to Q15
	99	Prefer not to answer	1%	Skip to Q15
Q14	What are the names of two or three stores or restaurants you would <u>most</u> like to have located in Thousand Oaks? Verbatim responses recorder and later grouped into categories shown below, with examples provided.			
	Large discount store (Costco, Sam's)		18%	
	Family restaurant chain (Macaroni Grill, Claim Jumper)		18%	
	Specialty goods store (REI, IKEA)		12%	
	Home improvement store (Home Depot, Lowe's)		11%	
	Grocery store chains (Vons, Ralphs)		11%	
	Variety of ethnic restaurants		11%	
	Department store (Target, Wal-Mart)		9%	
	Upper-scale restaurant chain (Ruth's Chris Steakhouse, Lure Fish House)		9%	
	Fast food restaurant chain (Sonic, In-N-Out)		7%	
	Locally-owned, non-chain restaurant		7%	
	Not sure, cannot think of any		7%	
	Apparel boutiques (Charlotte Russe, Express)		6%	
	Contemporary casual cuisine (Yard House, California Chicken Cafe)		5%	
	Upper-scale clothing store (Dillard's, H & M)		3%	
	Entertainment (Dave & Busters, bowling alley)		3%	
	Apparel, department store (Bloomingdales, Nordstrom Rack)		2%	
	Coffee, bakery places		2%	
	Gourmet, specialty grocery store (Valley Produce, 99 Ranch)		1%	
	Arts and Crafts store (Michael's, Anna's Linens)		1%	
	Bookstores		1%	
	Vegan, healthier restaurants		1%	

Section 7: Spending Priorities

The City of Thousand Oaks has limited financial resources to provide local services, programs and projects desired by residents. Because it cannot fund every service, program and project, however, the City must set priorities.

Q15 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	Retain and expand the number of quality jobs in Thousand Oaks	46%	38%	11%	4%	1%	0%
B	Invest in road maintenance	51%	40%	8%	1%	0%	0%
C	Maintain parks and recreation facilities	42%	51%	5%	1%	0%	0%
D	Preserve library services	39%	37%	17%	5%	1%	0%
E	Maintain police services	74%	22%	3%	0%	0%	0%
F	Acquire and preserve natural open space	45%	34%	16%	5%	0%	0%
G	Protect water quality in creeks and streams	55%	31%	11%	2%	0%	1%
H	Support homeless services	22%	38%	27%	10%	2%	0%
I	Increase use of alternative and renewable power sources, such as solar	37%	31%	22%	8%	1%	0%
J	Maintain cultural arts facilities and programming	18%	46%	29%	7%	0%	0%
K	Maintain fire protection services	78%	20%	2%	1%	0%	0%
L	Support the development of affordable housing for seniors	32%	37%	22%	7%	1%	0%
M	Support the development of affordable housing for young families	27%	34%	25%	12%	1%	0%
N	Expand and improve the local trail system	18%	41%	31%	8%	1%	0%
O	Invest in local public infrastructure	41%	45%	9%	2%	2%	1%

Section 8: Staff & Governance								
Q16	For each of the items I read next, please tell me how good of a job you think the City of Thousand Oaks is doing. Here is the (first/next) one: _____. Would you say the City does an excellent, good, fair, poor or very poor job in this area?							
	<i>Randomize</i>	Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
A	Being responsive to residents and businesses	9%	40%	21%	7%	3%	19%	1%
B	Managing development and effectively planning for the future	9%	38%	26%	7%	3%	15%	1%
C	Working through critical issues facing the City	6%	40%	26%	5%	3%	20%	1%
D	Engaging with residents to get their feedback	15%	36%	25%	9%	4%	9%	1%
E	Providing access to information	13%	45%	22%	6%	2%	12%	1%
F	Spending tax dollars wisely	6%	36%	28%	8%	3%	19%	1%
Q17	In the past 12 months, have you been in contact with staff from the City of Thousand Oaks?							
	1	Yes	36%		Ask Q18			
	2	No	61%		Skip to Q19			
	98	Not sure	2%		Skip to Q19			
	99	Prefer not to answer	0%		Skip to Q19			
Q18	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>							
	<i>Randomize</i>	Very	Somewhat	Not at all	Not sure	Prefer not to answer		
A	Helpful	62%	29%	9%	0%	0%		
B	Professional	75%	19%	5%	1%	0%		
C	Accessible	57%	39%	4%	0%	0%		

Section 9: City-Resident Communication		
Q19	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: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>	
	1	Very satisfied 24%
	2	Somewhat satisfied 46%
	3	Somewhat dissatisfied 13%
	4	Very dissatisfied 3%
	98	Not sure 14%
	99	Prefer not to answer 0%
Q20	What information sources do you use to find out about City of Thousand Oaks news, services, programs and events? <i>Don't read list. Record up to first 3 responses.</i>	
	1	City Scene/City Newsletter 5%
	2	Ventura County Star/(daily newspaper) 25%
	3	Ventura County Reporter/weekly newspaper 1%
	4	LA Daily News/daily newspaper 2%
	5	The Acorn (weekly newspaper) 69%
	6	Civic Arts Plaza Season Brochure 9%
	7	Channel 10 or Channel 3, TOTV Government Access TV 3%
	8	Television (general) 5%
	9	City Council Meetings 0%
	10	Radio 5%
	11	City's website 22%
	12	Internet (not City's site) 18%
	13	Social Media like Facebook or Twitter 12%
	14	Utility bill insert 14%
	15	Email notification from City 10%
	16	Flyers, brochures or posters (displayed at public facilities) 4%
	17	Postcards, letters, flyers or brochures (mailed to home) 5%
	18	Street banners 4%
	19	Friends/Family/Associates 11%
	20	Other sources 5%
	21	Do Not Receive Information about City 2%
	98	Not sure 0%
	99	Prefer not to answer 0%

Q21		In the past six (6) months, have you visited the City's website?						
1	Yes	50%	Ask Q22					
2	No	47%	Skip to Q23					
98	Not sure	3%	Skip to Q23					
99	Prefer not to answer	0%	Skip to Q23					
Q22		Overall, how would you rate: _____? Would you say it is excellent, good, fair, poor, or very poor?						
	<i>Randomize</i>	Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
A	The overall quality of the City website	13%	54%	29%	2%	0%	1%	0%
B	The ability to find what you are looking for on the website	15%	45%	31%	8%	0%	1%	0%
C	The variety of content and resources available on the website	17%	52%	24%	1%	0%	5%	0%

Section 10: Medical & Non-Medical Marijuana

In 2015, the State of California passed a law creating a licensing process for commercial **medical** marijuana. In November 2016, California voters approved Proposition 64 to legalize the private, **non-medical** use of marijuana by adults. Proposition 64 was supported by 54% of Thousand Oaks residents. The law also placed a number of restrictions on the use of marijuana, including that it can't be consumed in a public place, within 1,000 feet of schools, daycare facilities or youth centers, or while driving or riding in a vehicle. Households are also limited to the cultivation of six (6) plants for personal use only. Under these laws, local cities have the option of restricting or prohibiting the commercial cultivation, manufacturing, sale, and distribution of marijuana within their boundaries.

Q23		In your opinion, should the City of Thousand Oaks allow: _____?			
	<i>Randomize</i>	Yes, allow	No, don't allow	Not sure	Prefer not to answer
A	A limited number of medical marijuana dispensaries to locate within the City	56%	38%	5%	1%
B	A limited number of non-medical marijuana dispensaries to locate within the City	39%	55%	5%	1%
C	The delivery of medical marijuana to private residences within the City	63%	30%	6%	1%
D	The delivery of non-medical marijuana to private residences within the City	36%	57%	6%	1%
E	The commercial cultivation of marijuana on private property	34%	58%	7%	1%

Section 11: Background & Demographics

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

D1	In what year were you born? Year recoded into age groups shown below.			
	18 to 24		10%	
	25 to 34		12%	
	35 to 44		15%	
	45 to 54		19%	
	55 to 64		15%	
	65 or older		23%	
	Prefer not to answer		6%	
D2	How many children under the age of 18 living in your household?			
	0	None	63%	
	1	One	12%	
	2	Two	15%	
	3	Three	5%	
	4	Four or more	1%	
	99	Prefer not to answer	4%	
D3	Do you own or rent your residence in Thousand Oaks?			
	1	Own	81%	
	2	Rent	17%	
	99	Prefer not to answer	2%	
D4	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	50%	Ask D5
	2	Employed part-time	7%	Ask D5
	3	Student	4%	Ask D5
	4	Homemaker	6%	Skip to end
	5	Retired	25%	Skip to end
	6	In-between jobs	3%	Skip to end
	98	Not sure	0%	Skip to end
	99	Prefer not to answer	5%	Skip to end

D5	Do you commute outside of Thousand Oaks on a regular basis for (your job/school)?			
	1	Yes	60%	Ask D6
	2	No	38%	Skip to end
	98	Not sure	0%	Skip to end
	99	Prefer not to answer	1%	Skip to end
D6	How much time does it typically take you to commute to (your job/school), <u>round-trip</u> ? Minutes recorded and grouped into categories shown below.			
	20 or less		12%	
	21 to 39		14%	
	40 to 59		9%	
	60 or more		57%	
	Not sure		3%	
	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 Thousand Oaks.

Post-Interview Items

D7	Gender		
	1	Male	50%
	2	Female	45%
	3	Prefer to answer	5%