

COMMUNITY OPINION SURVEY

SUMMARY REPORT

PREPARED FOR THE
CITY OF SAN MATEO



MAY 11, 2020



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TABLE OF CONTENTS

Table of Contents	i
List of Tables	iii
List of Figures	iv
Introduction	1
Purpose of Study	1
Overview of Methodology	2
Organization of Report	2
Acknowledgements	2
Disclaimer	2
About True North	2
Just the Facts	3
Quality of Life	3
City Services	3
Housing & Building	3
Recreation & Facilities	4
Communications	5
Conclusions	6
Quality of Life	11
Overall Quality of Life	11
Question 2	11
What Do You Like Most About Living in San Mateo?	12
Question 3	13
What Should Be Changed?	13
Question 4	14
City Services	15
Overall Satisfaction	15
Question 5	15
Specific Services	17
Question 6	17
Differentiators of Opinion	18
Housing & Building	19
Affordable Housing	19
Question 7	19
Initial Preference for Future Housing	20
Question 8	20
Reasons for Housing Preference	22
Question 9	22
Question 10	23
Strategies to Concentrate Housing	23
Question 11	24
Strategies to Spread Housing	25
Question 12	25
Informed Preference for Future Housing	26
Question 13	26
Recreation & Facilities	27
Frequency of Use	27
Question 14	27
Programming Interests	28
Question 15	28
Priority Improvements	29
Question 16	30

Communications	32
Overall Satisfaction With Communication	32
Question 17	32
Sources of Information	34
Question 18	34
Communication Preferences	36
Question 19	36
Background & Demographics	38
Methodology	39
Questionnaire Development	39
Programming, Pre-Test & Translation	39
Sample, Recruiting & Data Collection	39
Margin of Error due to Sampling	40
Data Processing & Weighting	41
Rounding	41
Questionnaire & Toplines	42



LIST OF TABLES

Table 1	Rating City of San Mateo by Years in San Mateo & Child in Hsld (Showing % Excellent + Good)	12
Table 2	Rating City of San Mateo by Age & Gender (Showing % Excellent + Good)	12
Table 3	Rating City of San Mateo by Ethnicity, Home Ownership Status & Adult Over 65 in Hsld (Showing % Excellent + Good)	12
Table 4	Satisfaction With Services by Overall Satisfaction With City	18
Table 5	Amount of Affordable Housing in San Mateo by Years in San Mateo & Adult 65+ in Hsld (Showing % Too Little)	20
Table 6	Amount of Affordable Housing in San Mateo by Age (Showing % Too Little)	20
Table 7	Amount of Affordable Housing in San Mateo by Gender, Child in Hsld & Home Ownership Status (Showing % Too Little)	20
Table 8	Support for Strategies to Concentrate Housing by Years in San Mateo & Overall Satisfaction (Showing % Strongly Support)	24
Table 9	Support for Strategies to Concentrate Housing by Age & Home Ownership Status (Showing % Strongly Support)	24
Table 10	Support for Strategies to Concentrate Housing by Ethnicity & Home Type (Showing % Strongly Support)	24
Table 11	Support for Strategies to Spread Housing by Years in San Mateo (Showing % Strongly Support)	25
Table 12	Support for Strategies to Spread Housing by Ethnicity & Home Ownership Status (Showing % Strongly Support)	25
Table 13	Support for Strategies to Spread Housing by Age (Showing % Strongly Support)	26
Table 14	Support for Strategies to Spread Housing by Overall Satisfaction & Home Type (Showing % Strongly Support)	26
Table 15	Frequency of Hsld Visits to a... by Ethnicity, Home Ownership Status & Adult Over 65 in Hsld (Showing % At Least 1 per Month)	28
Table 16	Frequency of Hsld Visits to a... by Overall Satisfaction & Child in Hsld (Showing % At Least 1 per Month)	28
Table 17	Interest in Activities Offered by City by Ethnicity, Home Ownership Status & Adult Over 65 in Hsld (Showing % Very Interested)	29
Table 18	Interest in Activities Offered by City by Overall Satisfaction & Child in Hsld (Showing % Very Interested)	29
Table 19	Recreation Priorities by Years in San Mateo & Gender (Showing % High Priority)	30
Table 20	Recreation Priorities by Age (Showing % High Priority)	31
Table 21	Recreation Priorities by Ethnicity & Overall Satisfaction (Showing % High Priority)	31
Table 22	Recreation Priorities by Child in Hsld, Adult Over 65 in Hsld & Home Ownership Status (Showing % High Priority)	31
Table 23	Effectiveness of Communication Methods by Age (Showing % Very Effective)	36
Table 24	Effectiveness of Communication Methods by Overall Satisfaction & Ethnicity (Showing % Very Effective)	37
Table 25	Effectiveness of Communication Methods by Child in Hsld & Satisfaction With Communication (Showing % Very Effective)	37
Table 26	Demographics of Sample	38



LIST OF FIGURES

Figure 1	Rating City of San Mateo	11
Figure 2	Like Most About San Mateo	13
Figure 3	Changes to Improve City	14
Figure 4	Overall Satisfaction	15
Figure 5	Overall Satisfaction by Years in San Mateo & Child in Hsld	16
Figure 6	Overall Satisfaction by Age & Gender	16
Figure 7	Overall Satisfaction by Home Ownership Status, Ethnicity & Adult Over 65 in Hsld	16
Figure 8	Satisfaction With City Services	17
Figure 9	Amount of Affordable Housing in San Mateo	19
Figure 10	Initial Preference For Future Residential Development	20
Figure 11	Initial Preference For Future Residential Development by Years in San Mateo, Overall Satisfaction & Home Type	21
Figure 12	Initial Preference For Future Residential Development by Home Ownership Status, Ethnicity & Age	21
Figure 13	Reasons For Preferring Concentrated Additional Housing	22
Figure 14	Reasons For Preferring Additional Housing Spread Throughout City	23
Figure 15	Support for Strategies to Concentrate Housing	24
Figure 16	Support for Strategies to Spread Housing	25
Figure 17	Informed Preference for Future Residential Development	26
Figure 18	Frequency of Hsld Visits to a...	27
Figure 19	Interest in Activities Offered by City	28
Figure 20	Recreation Priorities	30
Figure 21	Satisfaction With Communication	32
Figure 22	Satisfaction With Communication by Years in San Mateo, Child in Hsld & Adult Over 65 in Hsld	33
Figure 23	Satisfaction With Communication by Age & Gender	33
Figure 24	Satisfaction With Communication by Ethnicity, Overall Satisfaction & Home Ownership Status	33
Figure 25	Information Sources	34
Figure 26	Information Sources by Overall, Age & Satisfaction With Communication	35
Figure 27	Information Sources by Ethnicity, Child in Hsld & Adult Over 65 in Hsld	35
Figure 28	Information Sources by Years in San Mateo & Overall Satisfaction	35
Figure 29	Effectiveness of Communication Methods	36
Figure 30	Maximum Margin of Error	40



INTRODUCTION

Encompassing 15.9 square miles in the San Francisco Bay Area, the City of San Mateo was incorporated in 1894 and is currently home to an estimated 104,570 residents.¹ The City's dedicated team of full-time and part-time employees provides a full suite of services to residents and local businesses.

To monitor its progress in meeting residents' needs, the City engages residents on a daily basis and receives periodic *subjective* feedback regarding its performance and policies. Although these informal feedback mechanisms are a valuable source of information for the City in that they provide timely and accurate information about the opinions of specific residents, it is important to recognize that they do not necessarily provide an accurate picture of the community as a whole. For the most part, informal feedback mechanisms rely on the resident to initiate feedback, which creates a self-selection bias. The City receives feedback only from those residents who are motivated enough to initiate the feedback process. Because these residents tend to be those who are either very pleased or very displeased with a particular service or policy, 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 city services, facilities, and policies. Ultimately, the survey results and analyses presented in this report will provide Council and staff with information that can be used to make sound, strategic decisions in a variety of areas including service improvements and enhancements, measuring and tracking internal performance, budgeting, and community outreach.

In addition to gathering performance-related feedback, the survey was also designed to help inform the City's General Plan update. Like most California cities, the City of San Mateo relies on its General Plan to guide decisions with respect to land use, development, mobility, sustainability, and related policy matters. Although the City Council, staff, and consultants have played an important role in gathering data and organizing the update process, it was the desire of the City that the citizens of San Mateo be the true inspiration and authors of the Plan. Accordingly, a portion of the survey was dedicated to understanding San Mateo residents' needs and opinions as they relate to issues that will be addressed in the General Plan, with a focus on how best to plan future housing as required by State law.

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

- Identify key issues of importance for residents, as well as their perceptions of the quality of life in San Mateo;
- 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 General Plan topics with a focus on land use and housing;

1. State of California, Department of Finance, January 2019.

- Profile household use of parks and recreation facilities, household interest in various recreation programs, and park and recreation funding priorities;
- Determine satisfaction with (and perceived effectiveness of) the City’s communication with residents; *and*
- Collect additional background and demographic data that are relevant to understanding residents’ perceptions, needs, and interests.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 39). In brief, the survey was administered to a random sample of 1,276 adults who reside in the City of San Mateo. The survey followed a mixed-method design that employed multiple recruiting methods (mailed letters, email, and telephone) and multiple data collection methods (telephone and online). Administered in English and Spanish between January 27 and February 6, 2020, the average interview lasted 18 minutes.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 42), and a complete set of crosstabulations for the survey results is contained in Appendix A.

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

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

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

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

JUST THE FACTS

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

QUALITY OF LIFE

- San Mateo residents provided positive ratings for the overall quality of life in the City (81% excellent or good), San Mateo as a place to shop and dine (72%), and as a place to raise a family (65%).
- Although still rated favorably by over half of respondents, residents provided somewhat softer ratings for San Mateo as a place to work (58%) and as a place to recreate (56%).
- Less than one-third of residents provided a favorable rating for San Mateo as a place to retire (30%), although approximately 16% held no opinion or did not provide a rating.
- When asked what they like most about living in the City of San Mateo that city government should make sure to *preserve* in the future, residents were most apt to cite parks and recreation facilities and opportunities (26%), shopping and dining opportunities (14%), small town atmosphere (11%), and proximity to surrounding cities/areas (10%).
- When residents were asked to indicate the one thing city government could *change* to make San Mateo a better place to live, now and in the future, providing more affordable housing was the most common response (24%), followed by reducing traffic congestion (19%), limiting growth and preserving open space (16%), improving and maintaining infrastructure and roads (10%), and improving parking (9%).

CITY SERVICES

- Close to three-quarters (73%) of San Mateo residents indicated they were either very (19%) or somewhat (54%) satisfied with the City's efforts to provide municipal services. Approximately 18% were very or somewhat dissatisfied, whereas 9% were unsure or unwilling to share their opinion.
- Residents were asked to rate their satisfaction with 13 specific services provided by the City of San Mateo. Although the majority of residents surveyed were satisfied with 12 of the 13 services tested, they were most satisfied with the City's efforts to provide fire protection, prevention, and emergency medical services (96% very or somewhat satisfied), followed by maintain public buildings and facilities like City Hall, libraries, and parking garages (92%) and provide parks, sports fields, and recreation facilities (89%).
- At the other end of the spectrum, respondents were comparatively less satisfied with the City's efforts to manage traffic congestion (30%), address homelessness (51%), and maintain local streets and roads (54%).

HOUSING & BUILDING

- Approximately seven-in-ten residents indicated that there is currently too little housing that is affordable for middle-income (72%) and low-income families (69%). Approximately one quarter of residents felt the amount of affordable housing was about right or were unsure (middle income: 24%, low income: 25%), while just 4% felt there was too much housing that is affordable for middle-income families and 7% shared the same sentiment for housing that is affordable for low-income families.

- After informing respondents that the State of California is expected to require the City of San Mateo to plan for thousands of new housing units, just over half (51%) initially preferred that new homes be **concentrated** in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants. Forty-one percent (41%) of respondents preferred that the new housing be **spread** throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods. The remaining 8% were unwilling to share their opinion.
- Respondents who preferred that new housing be **concentrated** in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants were most apt to cite easier access to public transportation (33%) and less traffic congestion/having fewer cars on the road (26%) as the main reasons for their preference. Other reasons cited by at least 10% of this subgroup of respondents included preserving open space/limiting sprawl (15%), improved access to shopping and dining (11%), and preserving existing neighborhoods (11%).
- Respondents who preferred that new housing be **spread** throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods cited reducing congestion and spreading people out as the main reason for their preference (28%), followed by a general preference for housing to be spread out and that there is currently too much density (20%) and that the plan allows for more balanced, distributed communities (13%).
- A majority of respondents supported three of the four strategies tested for **concentrating** future housing, with support being greatest for allowing buildings up to eight stories in a few areas of the City near transit (66% strongly or somewhat support), followed by keeping existing five story building limits, but allowing more housing units within each building (57%), and allowing buildings up to 12 stories in these areas (51%). Less than half of respondents supported allowing buildings over 12 stories in these areas (47%).
- Among the three strategies tested for **spreading** future housing throughout the city, support was strongest for allowing single family homes to be redeveloped into duplexes (66%). Just under a majority (49%) of respondents expressed support for allowing single family homes to be redeveloped with up to four units per parcel, whereas approximately four-in-ten (41%) supported allowing condominiums or apartments to be built in areas currently zoned for single family houses.
- After learning more about the strategies that may be required for concentrating or spreading housing throughout the city, approximately 15% of respondents changed their preference, although the changes were largely off-setting. The majority (52%) of residents continued to prefer that future housing to be concentrated in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants, while 40% of respondents preferred to spread future housing throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods (initially 41%). Eight percent remained unwilling to share their opinion.

RECREATION & FACILITIES

- On a yearly basis, nearly all San Mateo households utilize city parks (98%), three-quarters utilize community centers (76%), and four-in-ten households (41%) make use of city pools.
- The *frequency* of visits is highest for parks, with 70% of residents reporting that their household visits a San Mateo park at least once per month. Twenty percent (20%) of respondents reported monthly visits to a community center by their household, whereas 5% visit a city pool at least once per month.

- When presented with a list of eight activities that could be offered by the City, art and cultural enrichment programs received the highest level of household interest (82% very or somewhat interested), followed by drop-in gym use, weight rooms or cardio equipment (75%) and adult group fitness classes (73%).
- At the other end of the spectrum, less than the majority of households expressed interest in participating in learning to swim classes (45%), licensed preschool and after school childcare (48%), and activities for teens (49%).
- Among 11 specific recreation projects being considered by the City, expanding and improving the network of outdoor trails in the City was assigned the highest priority (73% high or medium priority), followed by making improvements to Central Park (69%), providing licensed pre-school and after-school childcare facilities (68%), and upgrading children's play areas in existing parks (66%).

COMMUNICATIONS

- Overall, 70% of respondents indicated they were satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means. The remaining respondents were either dissatisfied with the City's efforts in this respect (19%) or unsure of their opinion (11%).
- The most frequently cited source for city information was the San Mateo Daily Journal, mentioned by 37% of respondents. The Daily Journal was followed by letters, postcards, flyers, or brochures mailed to the home (31%), email notifications from the City (31%), and the social media website and app Nextdoor (26%).
- Respondents indicated that email was the most effective method for the City to communicate with them (88% very or somewhat effective), followed by postcards, letters, and newsletters mailed to the home (i.e., direct mail, 79%), social media like Facebook, Twitter, and Nextdoor (77%), and the City's website (69%).
- Television programs (40%), advertisements in local papers (43%), and town hall meetings (49%) were generally viewed by residents as less effective ways for the City to communicate with them.

CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide the City of San Mateo with a statistically reliable understanding of its residents' opinions, satisfaction, and needs as they relate to city services, facilities and policies, as well as topics pertinent to the General Plan update. 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 some of the key questions that motivated the research.

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

San Mateo residents are generally satisfied with the City's efforts to provide services, as well as the quality of life in their city. Close to three-quarters of residents (73%) indicated they were satisfied with the City's overall efforts to provide municipal services, whereas 18% were dissatisfied and the remaining 9% were unsure or did not provide a response (see *Overall Satisfaction* on page 15). The level of satisfaction expressed with the City's performance *in general* was also mirrored in residents' assessments of the City's performance in providing most specific services, with the highest satisfaction scores assigned to the City's efforts to provide fire protection, prevention, and emergency medical services, maintain public buildings and facilities like City Hall, libraries, and parking garages, and provide parks, sports fields, and recreation facilities (see *Specific Services* on page 17).

The City's performance in providing municipal services has contributed to a high quality of life for residents. Indeed, the vast majority of residents surveyed (81%) rated the quality of life in the City of San Mateo as excellent or good. This sentiment was also widespread, with the percentage who rated the quality of life as excellent or good exceeding 70% across *every* identified resident subgroup (see *Overall Quality of Life* on page 11).

When asked in an open-ended manner to describe the things they value most about living in San Mateo that they would like to preserve in the future, parks and recreation facilities and opportunities was at the top of the list, followed by shopping and dining opportunities, San Mateo's small town atmosphere, and proximity to surrounding cities/areas (see *What Do You Like Most About Living in San Mateo?* on page 12).

Where should the City focus its efforts in the future?

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

Considering respondents' verbatim answers regarding what they feel city government could do to make San Mateo a better place to live (see *What Should Be Changed?* on page 13) and the levels of satisfaction found in specific service areas (see *Specific Services* on page 17), the top priorities are: providing affordable housing, reducing traffic congestion, limiting growth/preserving open space, addressing homelessness, and maintaining local streets and roads.

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

What do the survey results reveal about San Mateo residents' opinions on housing?

As noted in the prior section, affordable housing is top-of-mind for many San Mateo residents. Approximately one-quarter of respondents (24%) mentioned a desire for additional affordable housing when asked what *one* change the City could make to improve the quality of life in San Mateo, and more than two-thirds of residents perceived that there currently is not enough affordable housing in the City for middle-income (72%) and low-income (69%) families. Although younger residents and those currently renting their home were the most likely to perceive a shortage of affordable housing in the City, that view was also shared by a large majority of residents who currently own their home in the City (see *Affordable Housing* on page 19).

The aforementioned patterns notwithstanding, it should also be recognized that some residents are concerned about growth and development (see *What Should Be Changed?* on page 13), and opinions are mixed regarding how best to accommodate future housing in the City. Upon learning that the State of California is expected to require the City of San Mateo to plan for thousands of new housing units, just over half (51%) preferred that these new homes be **concentrated** in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants, explaining their preference by citing easier access to public transportation, having less traffic congestion/fewer cars on the road, preserving open space/limiting sprawl, improved access to shopping and dining, and preserving existing neighborhoods.

Conversely, 41% of respondents preferred that the new housing be **spread** throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods. When asked to explain their preference, they anticipated that spreading new housing throughout the City would reduce traffic congestion, maintain lower densities, and allow for more balanced/distributed communities.

On the topic of housing, there were some interesting patterns among San Mateo resident subgroups. Although most subgroups favored future housing to be concentrated in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants, this was especially true for newer residents, those living in single family homes, home owners, Caucasians, and residents under the age of 35. Those who rent their home and those currently living in condominiums or apartments were the only subgroups to express a clear preference for spreading new housing throughout the City with smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods (see *Initial Preference for Future Housing* on page 20).

To be able to **concentrate** additional housing in a few areas of the City near transit, stores and restaurants may require allowing taller buildings and/or allowing more units per acre (see *Strategies to Concentrate Housing* on page 23). With this in mind, two-thirds (66%) of respondents indicated they would support allowing buildings up to eight stories in a few areas of the City near transit, whereas 51% supported allowing buildings up to 12 stories in these areas. A majority were also in support of an alternative concentration strategy of keeping existing five story building limits, but allowing more housing units within each building (57%).

When it comes to the alternative approach of **spreading** housing throughout the City, close to two-thirds of respondents supported allowing single family homes to be redeveloped into duplexes (66%). Options that allowed for even higher density in existing residential neighborhoods, however, met with more resistance. Just under a majority (49%) of respondents expressed support for allowing single family homes to be redeveloped with up to four units per parcel, whereas approximately four-in-ten (41%) supported allowing condominiums or apartments to be built in areas currently zoned for single family houses (see *Strategies to Spread Housing* on page 25).

To what extent are San Mateo residents making use of the City's parks and recreation facilities, and what do they view as future priorities?

The City of San Mateo is currently home to over 20 neighborhood and community parks, hundreds of acres of preserved open space, and numerous recreation and community facilities. By providing much-needed spaces to recreate, relax and play, San Mateo's parks and recreation facilities help to promote a strong sense of community in the City,

improve property values, enhance the business climate and local economy, and generally contribute to a higher quality of life for residents and visitors alike. Indeed, when asked what they like most about the City of San Mateo that should be preserved in the future, residents were most apt to reference the City's parks, recreation facilities, and recreation opportunities (see *What Do You Like Most About Living in San Mateo?* on page 12).

Consistent with the above, the results of the survey indicate that most residents take advantage of the City's parks and recreation facilities, with nearly all respondents indicating that at least one member of their household periodically visits a San Mateo park and just over three-quarters stating they make periodic use of the City's community centers. As is often the case, household use of the City's pools was lower, with four-in-ten households utilizing them on an annual basis (see *Frequency of Use* on page 27).

To help the City update its recreation programs, parks, and facilities, the survey asked respondents to identify the programs and activities of greatest interest to their households, as well as prioritize among a list of 11 improvements being considered for future funding. Art and cultural enrichment programs received the highest level of household interest, followed by drop-in gym use, weight rooms or cardio equipment and adult group fitness classes. That said, program interest varied widely across demographic subgroups, with activities targeted to a specific demographic group generally being rated highest among that particular group. For example, although less than 30% of *all* households were *very* interested in licensed preschool and after school childcare, the level reached two-thirds among respondents with children under six years of age in their household (see *Programming Interests* on page 28).

Among the facility improvements being considered by the City, expanding and improving the network of outdoor trails in the City was viewed as the highest priority, followed by making improvements to Central Park, providing licensed pre-school and after-school childcare facilities, and upgrading children's play areas in existing parks (see *Priority Improvements* on page 29).

How well is the City communicating with San Mateo residents?

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

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

Looking to the future, there are a variety of communication methods that residents generally viewed as being effective ways for the City to communicate with them (see *Communication Preferences* on page 36). Some of these methods the City appears to already be using effectively, including the City's website and social media. Others—including direct mail—may require additional investment on the part of the City, but were widely noted by residents as being effective means for the City to communicate with them.

Although there is cost-savings to be had from relying *exclusively* on electronic communication channels, it is not a recommended practice, as research has shown that it will reduce readership and substantially lower residents' overall satisfaction with an agency's communication efforts. It also has a tendency to skew an agency's communication performance away from demographic subgroups that prefer traditional printed media. To the extent that the City can balance digital channels with traditional paper-based information sources like postcards and newsletters, it will optimize city-resident communication.

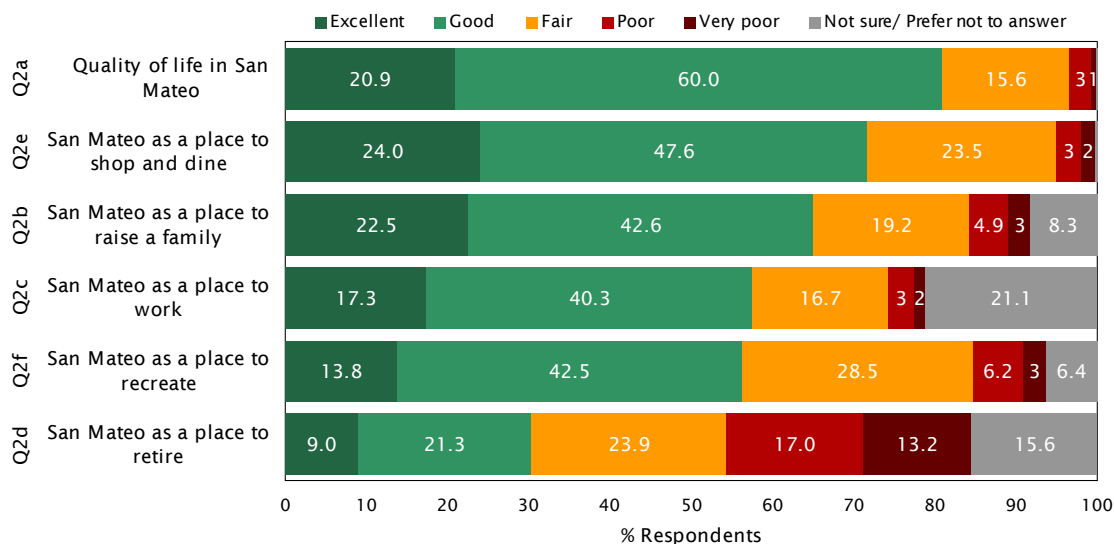
QUALITY OF LIFE

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

OVERALL QUALITY OF LIFE At the outset of the interview, respondents were asked to rate the City of San Mateo on a number of key dimensions—including overall quality of life, as a place to raise a family, and as a place to work—using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 1 below, the majority of residents shared favorable opinions of San Mateo on five of the six aspects tested, with the most positive ratings provided for the overall quality of life in the City (81% excellent or good), San Mateo as a place to shop and dine (72%), and as a place to raise a family (65%). Although still rated favorably by over half of respondents, residents provided somewhat softer ratings for San Mateo as a place to work (58%) and as a place to recreate (56%). Comparatively, less than one-third of residents provided a favorable rating for San Mateo as a place to retire (30%), although approximately 16% held no opinion or did not provide a rating. It is worth noting that the percentage of residents who were unsure or unwilling to share their opinion ranged from a low of 0% for the overall quality of life to a high of 21% for San Mateo as a place to work.

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

FIGURE 1 RATING CITY OF SAN MATEO



For the interested reader, tables 1 through 3 on the next page show how the ratings for each dimension tested in Question 2 varied by a host of demographic characteristics. For ease of comparison, the top three ratings within each subgroup are highlighted green. With the exception of newer (less than five years) and younger (under 35 years of age) residents, quality of life, San Mateo as a place to shop and dine, and San Mateo as a place to raise a family were rated as the top three among every other demographic subgroup. Newer residents and those 25 to 34 years of age rated San Mateo as a place to recreate higher than San Mateo as a place to raise a family.

Meanwhile, respondents 18 to 24 years of age rated San Mateo as a place to work in the top three, just slightly higher than San Mateo as a place to shop and dine.

TABLE 1 RATING CITY OF SAN MATEO BY YEARS IN SAN MATEO & CHILD IN HSLD (SHOWING % EXCELLENT + GOOD)

	Years in San Mateo (Q1)					Child in HslD (QD3,4)		
	Less than 1	1 to 4	5 to 9	10 to 14	15 or more	Yes, under 18	Yes, under 6	None
Quality of life in San Mateo	84.4	93.0	81.3	86.3	75.1	79.9	77.2	83.0
San Mateo as a place to shop and dine	73.6	79.5	70.2	73.5	68.5	72.1	70.7	71.7
San Mateo as a place to raise a family	48.8	57.8	68.2	67.6	68.4	72.0	66.8	62.6
San Mateo as a place to work	47.1	52.9	54.9	62.4	60.0	61.1	61.3	56.7
San Mateo as a place to recreate	58.6	62.6	59.6	64.5	51.3	59.2	61.0	56.4
San Mateo as a place to retire	30.3	27.4	23.7	27.5	33.7	22.8	23.2	35.3

TABLE 2 RATING CITY OF SAN MATEO BY AGE & GENDER (SHOWING % EXCELLENT + GOOD)

	Age (QD1)						Gender (QD2)	
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older	Male	Female
Quality of life in San Mateo	71.3	82.5	83.4	82.5	80.1	82.4	81.1	82.0
San Mateo as a place to shop and dine	59.3	81.1	71.1	70.1	70.6	71.4	72.6	71.5
San Mateo as a place to raise a family	67.4	56.7	66.1	68.8	67.7	68.9	64.1	66.6
San Mateo as a place to work	60.5	56.6	58.5	58.4	57.6	57.6	56.8	59.8
San Mateo as a place to recreate	40.4	59.3	62.8	57.0	58.2	53.4	54.9	58.2
San Mateo as a place to retire	38.2	31.4	24.3	20.1	27.4	44.6	30.1	31.1

TABLE 3 RATING CITY OF SAN MATEO BY ETHNICITY, HOME OWNERSHIP STATUS & ADULT OVER 65 IN HSLD (SHOWING % EXCELLENT + GOOD)

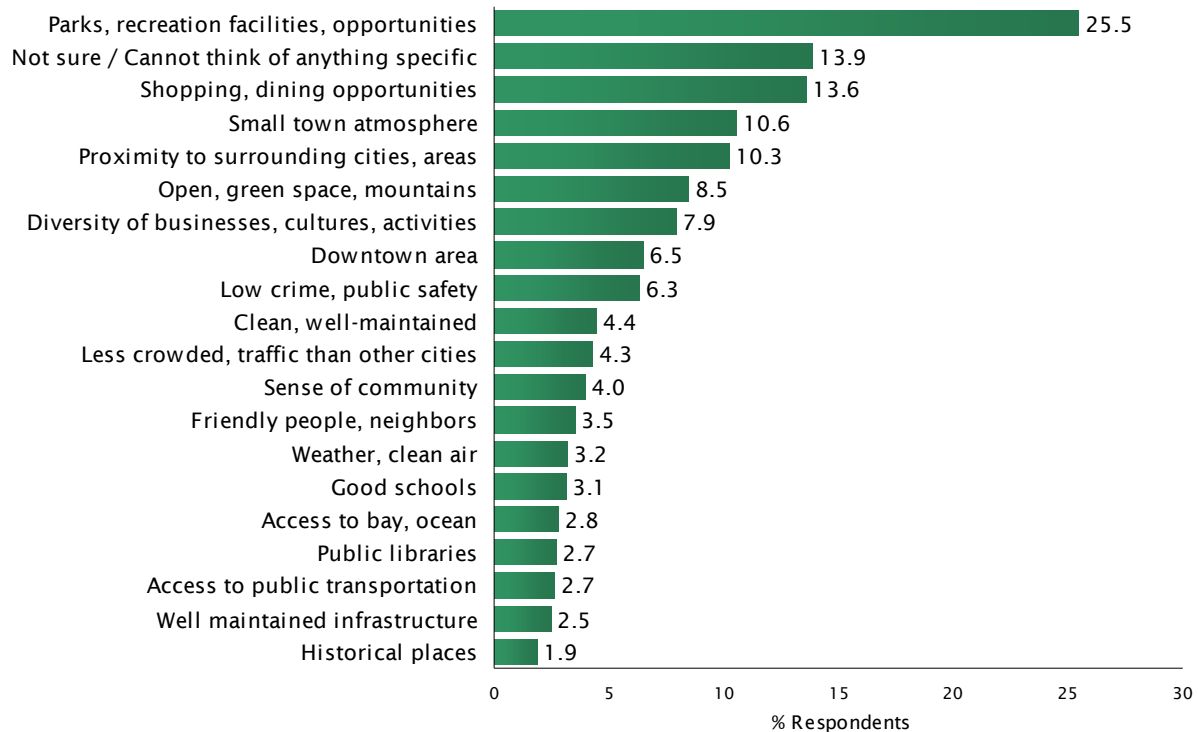
	Ethnicity (QD10)				Home Ownership Status (QD6)		Adult 65+ in HslD (QD5)	
	Caucasian/ White	Asian American	Latino/ Hispanic	Mixed or other	Own	Rent	Yes	No
Quality of life in San Mateo	84.1	90.4	73.9	78.4	85.3	76.0	80.2	82.7
San Mateo as a place to shop and dine	69.1	82.5	72.3	67.1	73.3	70.9	69.2	72.3
San Mateo as a place to raise a family	64.1	69.0	66.9	68.1	72.5	55.8	67.0	64.8
San Mateo as a place to work	56.8	56.4	64.1	53.9	59.5	55.4	57.7	58.0
San Mateo as a place to recreate	57.9	57.2	56.2	61.6	59.4	54.0	52.1	60.3
San Mateo as a place to retire	29.1	45.3	24.7	30.1	34.5	24.3	38.5	26.6

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

San Mateo residents were most apt to cite parks and recreation facilities and opportunities (26%) as what they like most about living in the City of San Mateo and would like to preserve, followed by shopping and dining opportunities (14%), small town atmosphere (11%), and proximity to surrounding cities/areas (10%). Other specific attributes that were mentioned by at least 5% of respondents included San Mateo's open/green space and mountains (9%), diversity of business, cultures, and activities (8%), downtown area (7%), and low crime rate/public safety (6%). Approximately 14% of residents could not think of anything specific when asked what they like most about San Mateo that should be preserved in the future.

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

FIGURE 2 LIKE MOST ABOUT SAN MATEO

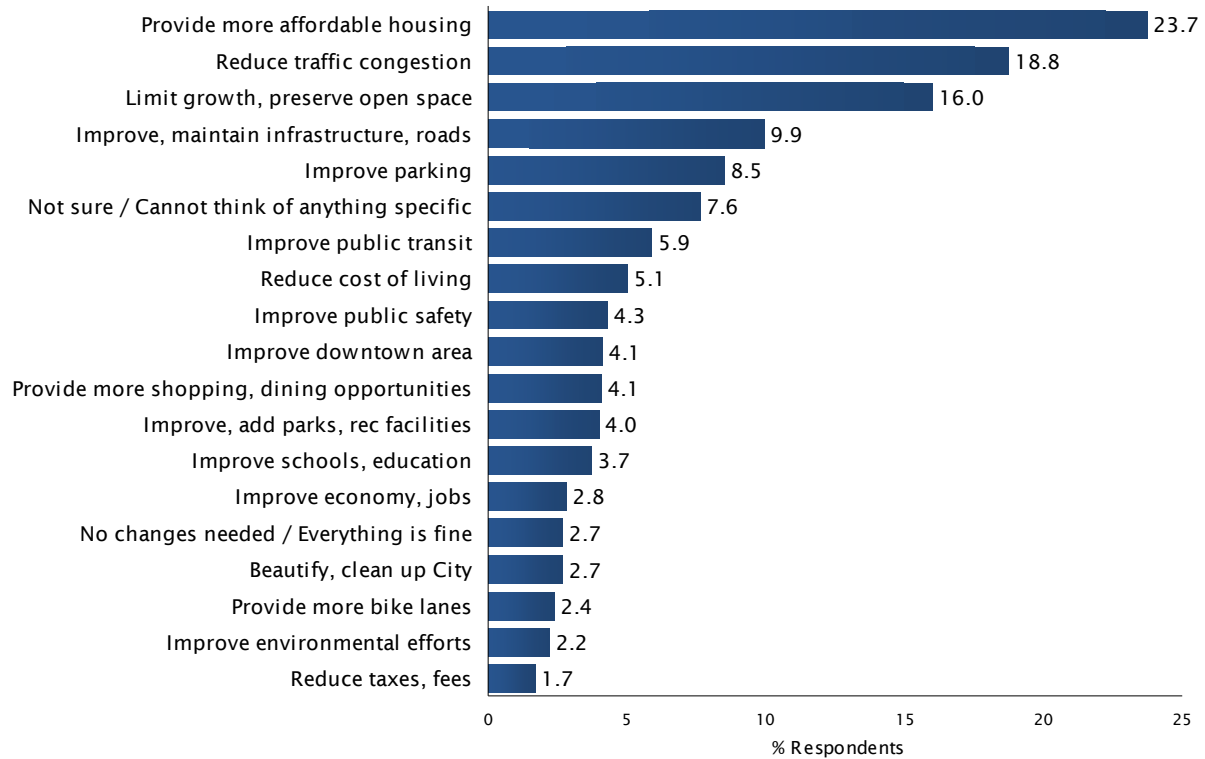


WHAT SHOULD BE CHANGED? In an open-ended manner similar to that described for Question 3, all respondents were also asked to indicate the one thing that city government could *change* to make San Mateo a better place to live. True North reviewed the verbatim responses to Question 4 and grouped them into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

Among the specific changes desired, providing more affordable housing was the most common (24%), followed by reducing traffic congestion (19%), limiting growth and preserving open space (16%), improving and maintaining infrastructure and roads (10%), and improving parking (9%). Approximately one-in-ten respondents could not think of a desired change (8%) or reported that no changes are needed (3%).

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

FIGURE 3 CHANGES TO IMPROVE CITY



CITY SERVICES

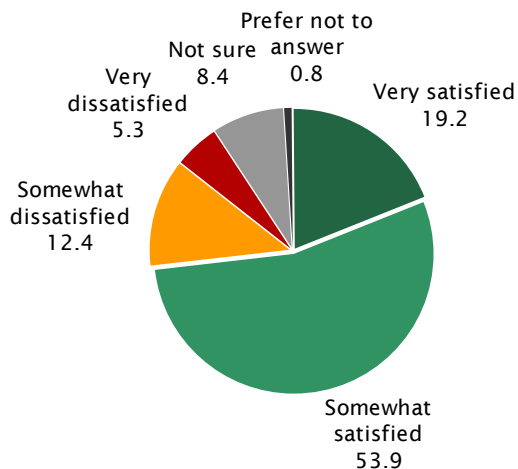
After measuring respondents' perceptions of the quality of life in San Mateo, the survey next turned to assessing their opinions about the City's performance in providing various municipal services.

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

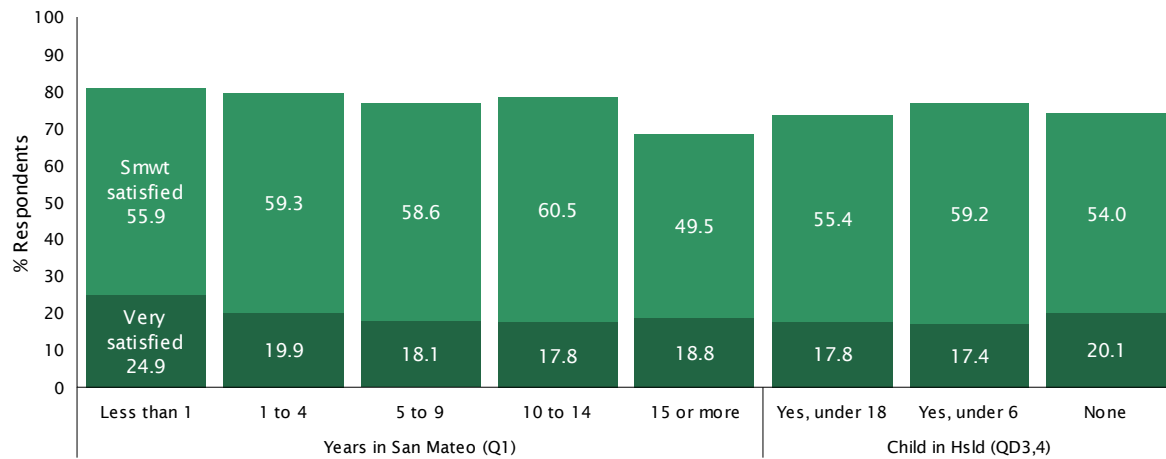
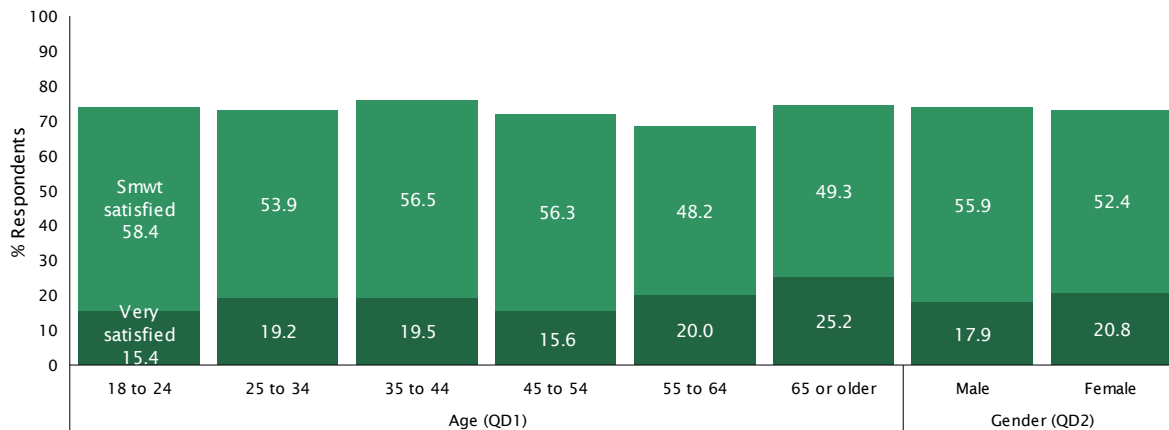
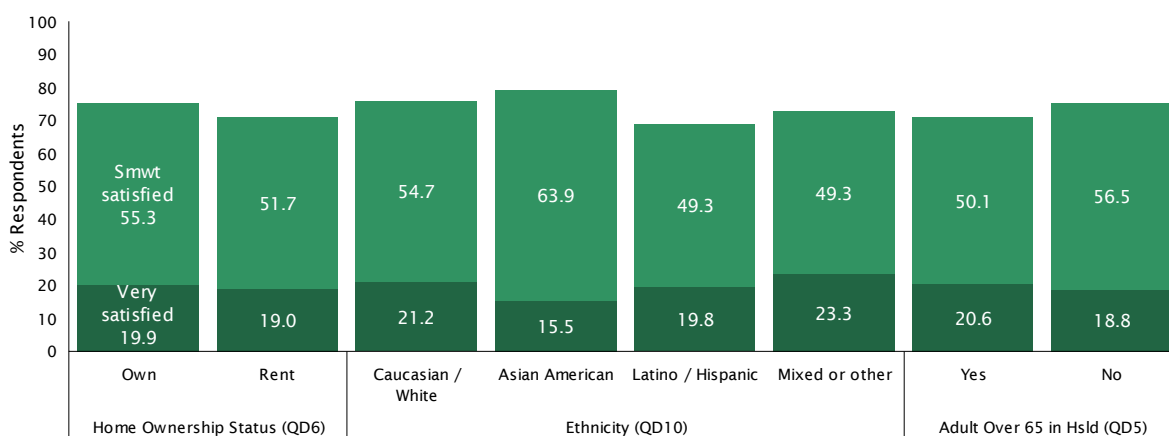
As shown in Figure 4, close to three-quarters (73%) of San Mateo residents indicated they were either very (19%) or somewhat (54%) satisfied with the City's efforts to provide municipal services. Approximately 18% were very or somewhat dissatisfied, whereas 9% were unsure or unwilling to share their opinion.

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

FIGURE 4 OVERALL SATISFACTION



The next three figures display how residents' opinions about the City's overall performance in providing municipal services varied by years in San Mateo, children in the household, age of the respondent, gender, home ownership status, ethnicity, and presence of an adult 65 years and older in the household. The most striking pattern in the figures is that the solid levels of satisfaction exhibited by respondents as a whole (see Figure 4 above) were generally echoed across resident subgroups, with satisfaction ranging from a low of 68% to a high of 81%.

FIGURE 5 OVERALL SATISFACTION BY YEARS IN SAN MATEO & CHILD IN HSLD**FIGURE 6 OVERALL SATISFACTION BY AGE & GENDER****FIGURE 7 OVERALL SATISFACTION BY HOME OWNERSHIP STATUS, ETHNICITY & ADULT OVER 65 IN HSLD**

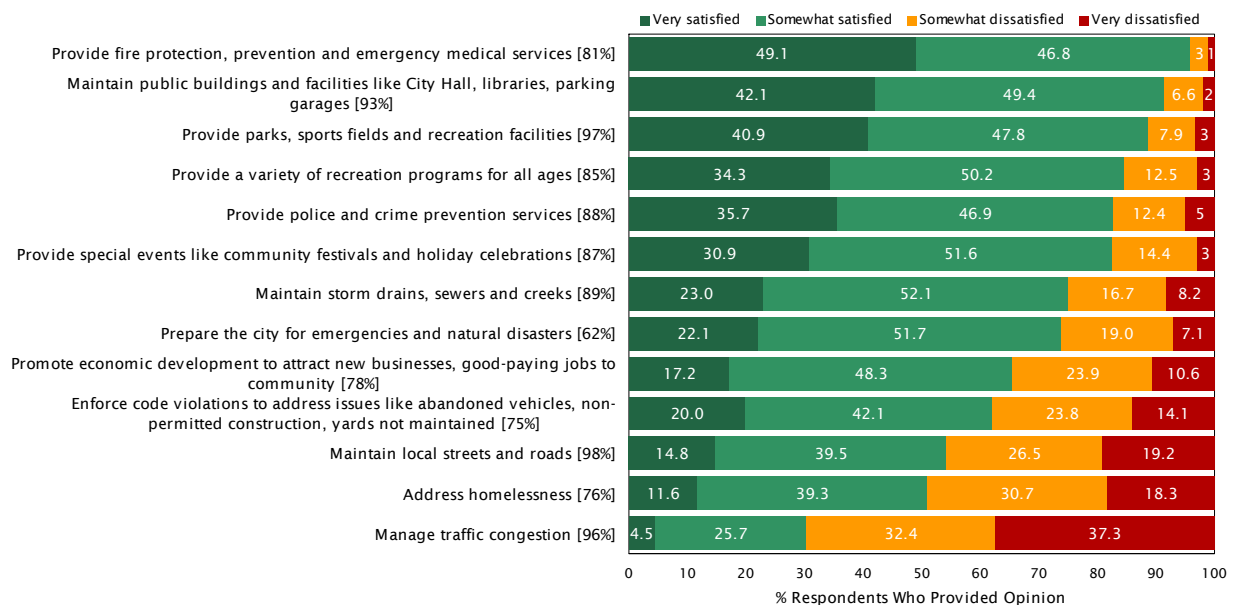
SPECIFIC SERVICES Whereas Question 5 addressed the City's *overall* performance, Question 6 asked residents to rate their level of satisfaction with each of the 13 specific service areas shown in Figure 8. The order in which the service areas were presented was randomized for each respondent to avoid a systematic position bias, although they have been sorted from high to low in Figure 8 according to the percentage of respondents who indicated they were satisfied with the City's performance in providing the service. For comparison purposes between the services, only respondents who held an opinion (satisfied or dissatisfied) are included in the figure. Those who did not have an opinion were removed from this analysis.²

At the top of the list, respondents were most satisfied with the City's efforts to provide fire protection, prevention, and emergency medical services (96% very or somewhat satisfied), followed by maintain public buildings and facilities like City Hall, libraries, and parking garages (92%) and provide parks, sports fields, and recreation facilities (89%).

At the other end of the spectrum, respondents were less satisfied with the City's efforts to manage traffic congestion (30%), address homelessness (51%), and maintain local streets and roads (54%).

Question 6 *For each of the services I read next, 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 8 SATISFACTION WITH CITY SERVICES



2. The percentage who held an opinion for each service is shown to the right of the service label in brackets.

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

When compared to their counterparts, those who were satisfied with the City's *overall* performance in providing city services were also more likely to express satisfaction with the City's efforts to provide each of the services tested in Question 6. That said, the greatest specific differentiators of opinion between satisfied and dissatisfied residents were found with respect to the City's efforts to promote economic development to attract new businesses and good-paying jobs to the community, enforce code violations to address issues like abandoned vehicles, non-permitted construction, and yards not being properly maintained, and maintain local streets and roads.

At the other end of the spectrum, there was much less difference between the two resident groups regarding their satisfaction with the City's efforts to provide fire protection, prevention, and emergency medical services.

TABLE 4 SATISFACTION WITH SERVICES BY OVERALL SATISFACTION WITH CITY

		Satisfaction With City's Overall Performance (Q5)		Difference Between Groups For Each Service
		Very or somewhat satisfied	Very or somewhat dissatisfied	
% Respondents Satisfied With Each Service	Promote economic development to attract new businesses, jobs to community	74.9	30.9	44.0
	Enforce code violations to address issues	71.9	31.0	40.8
	Maintain local streets and roads	62.8	23.0	39.7
	Prepare the city for emergencies and natural disasters	82.9	46.6	36.3
	Manage traffic congestion	36.3	6.8	29.5
	Maintain storm drains, sewers and creeks	81.1	53.8	27.3
	Provide a variety of recreation programs for all ages	90.5	63.4	27.2
	Provide police and crime prevention services	88.2	61.8	26.4
	Address homelessness	56.2	32.9	23.3
	Provide parks, sports fields and recreation facilities	92.6	69.8	22.8
	Maintain public buildings and facilities like City Hall, libraries, parking garages	95.5	73.1	22.4
	Provide special events like community festivals and holiday celebrations	86.5	66.3	20.3
	Provide fire protection, prevention and emergency medical services	97.9	88.5	9.5

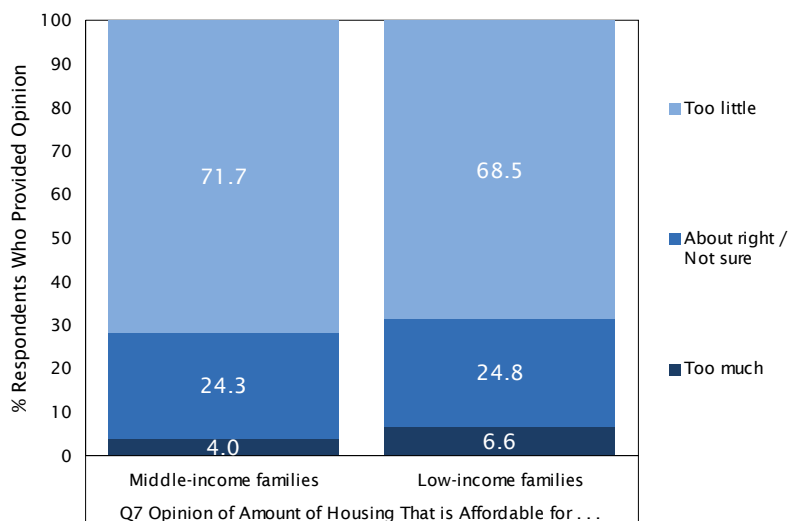
HOUSING & BUILDING

The General Plan will help shape the nature of San Mateo’s future development and redevelopment—including the size, type, character, and location of new housing projects—as well as the pace at which these changes occur. To help inform the City’s General Plan update, the survey included a series of questions related to housing, building heights and densities, as well as the preferred location for future housing.

AFFORDABLE HOUSING The first question in this series simply asked respondents to indicate whether there is currently too much, about the right amount, or too little affordable housing in the City of San Mateo for middle-income and low-income families, respectively. Residents expressed similar opinions for both types of affordable housing, with approximately seven-in-ten residents indicating that there is currently too little housing that is affordable for middle-income (72%) and low-income families (69%). Approximately one quarter of residents felt the amount of affordable housing was about right or were unsure (middle income: 24%, low income: 25%), while just 4% felt there was too much housing that is affordable for middle-income families and 7% shared the same sentiment for housing that is affordable for low-income families.

Question 7 *Next, I would like to ask a few questions about the availability of housing in the City of San Mateo. As I read the following housing types, please tell me whether you feel there is currently too much, about the right amount, or too little of this type of housing in the City of San Mateo.*

FIGURE 9 AMOUNT OF AFFORDABLE HOUSING IN SAN MATEO



Tables 5-7 on the next page display the percentage of residents who felt there is currently *too little* of each affordable housing type in the City by key demographic traits. Approximately eight-out-of-ten residents between the ages of 25 and 34 years, those with children 5 years and younger in the home, and renters perceived a lack of affordable housing for middle-income families. More than eight-in-ten residents 18 to 24 years of age expressed the same sentiment about affordable housing for low-income families. Age and home ownership status were the greatest

differentiators of opinion for this question series. That said, even among residents who currently own their home, nearly two-thirds felt there is currently not enough affordable housing for middle-income and low-income families in the City.

TABLE 5 AMOUNT OF AFFORDABLE HOUSING IN SAN MATEO BY YEARS IN SAN MATEO & ADULT 65+ IN HSLD (SHOWING % TOO LITTLE)

	Years in San Mateo (Q1)					Adult 65+ in Hsld (QD5)	
	Less than 1	1 to 4	5 to 9	10 to 14	15 or more	Yes	No
Affordable for middle-income families	71.3	76.2	75.0	74.7	69.0	68.6	73.3
Affordable for low-income families	76.3	69.1	71.1	67.3	67.5	64.6	71.4

TABLE 6 AMOUNT OF AFFORDABLE HOUSING IN SAN MATEO BY AGE (SHOWING % TOO LITTLE)

	Age (QD1)					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
Affordable for middle-income families	69.1	79.5	75.8	71.1	64.2	68.7
Affordable for low-income families	81.3	77.0	67.2	65.5	59.5	67.0

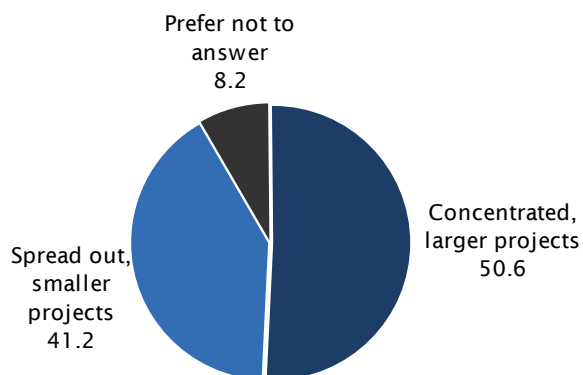
TABLE 7 AMOUNT OF AFFORDABLE HOUSING IN SAN MATEO BY GENDER, CHILD IN HSLD & HOME OWNERSHIP STATUS (SHOWING % TOO LITTLE)

	Gender (QD2)		Child in Hsld (QD3,4)			Home Ownership Status (QD6)	
	Male	Female	Yes, under 18	Yes, under 6	None	Own	Rent
Affordable for middle-income families	67.8	74.9	73.8	79.9	71.1	65.4	81.5
Affordable for low-income families	64.4	71.8	69.2	70.4	69.2	63.5	76.4

INITIAL PREFERENCE FOR FUTURE HOUSING California State law requires that all cities plan for additional housing. With a general shortage of housing in California, it is expected that the State will require the City of San Mateo to plan for thousands of new housing units.

Question 8 *California State law requires that all cities plan for additional housing. With a general shortage of housing in California, it is expected the State will require the City of San Mateo to plan for thousands of new housing units. Understanding that San Mateo will be required by law to plan for thousands of new homes, would you prefer that these homes: _____ OR _____? Randomize order of options 1 & 2.*

FIGURE 10 INITIAL PREFERENCE FOR FUTURE RESIDENTIAL DEVELOPMENT



After informing respondents of the above, the survey inquired as to how they would prefer to accommodate these new units. As shown in Figure 10, just over half (51%) preferred that new homes be **concentrated** in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants. Forty-one percent (41%) of respondents preferred that the new housing be **spread** throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods. The remaining 8% were unwilling to share their opinion.

Figures 11 and 12 demonstrate that most subgroups favored future housing to be concentrated in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants. This was especially true for newer residents, those living in single family homes, home owners, Caucasians, and residents under the age of 35. Respondents living in condominiums or apartments and renters were the only subgroups to express a clear preference for spreading new housing throughout the City with smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods.

FIGURE 11 INITIAL PREFERENCE FOR FUTURE RESIDENTIAL DEVELOPMENT BY YEARS IN SAN MATEO, OVERALL SATISFACTION & HOME TYPE

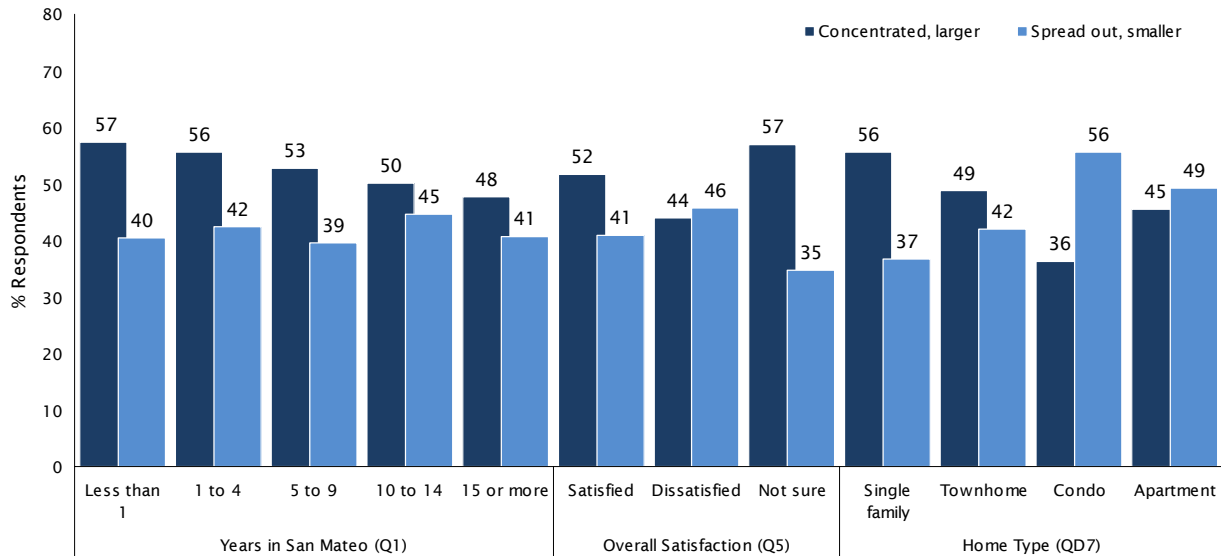
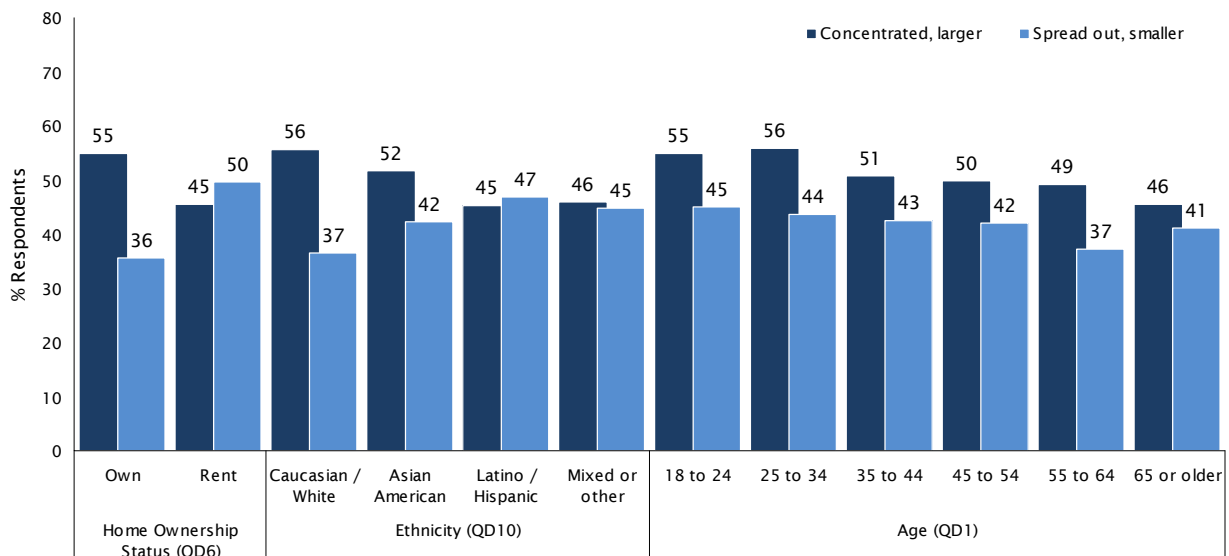


FIGURE 12 INITIAL PREFERENCE FOR FUTURE RESIDENTIAL DEVELOPMENT BY HOME OWNERSHIP STATUS, ETHNICITY & AGE

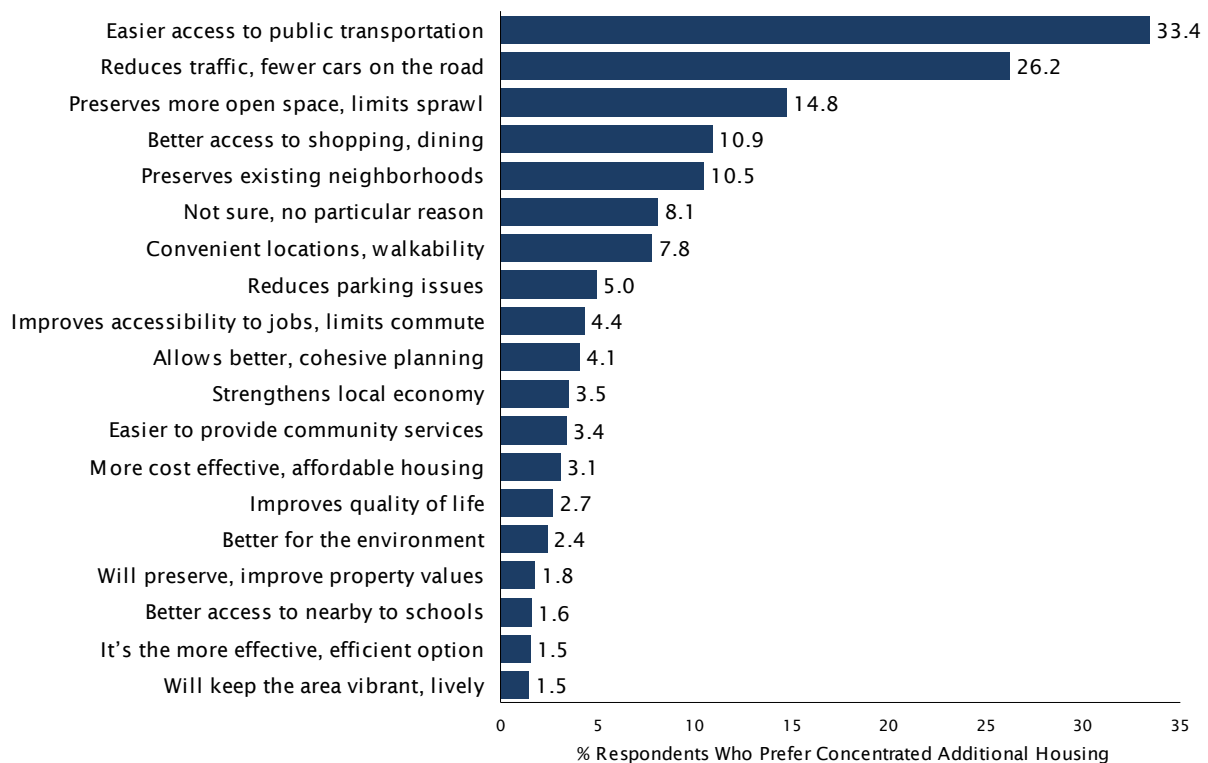


REASONS FOR HOUSING PREFERENCE To better understand the reasons behind their preference, residents were next asked a follow-up question based on which option they preferred for future residential housing in the City. Both questions 9 and 10 were asked in an open-ended manner, which allowed respondents to describe the reasons for their opinion 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 the figures 13 and 14.

Respondents who preferred that new housing be **concentrated** in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants were most apt to cite easier access to public transportation (33%) and less traffic congestion/having fewer cars on the road (26%) as the main reasons for their preference (see Figure 13). Other reasons cited by at least 10% of respondents who preferred that additional housing be concentrated in a few areas of the City included preserving open space/limiting sprawl (15%), improved access to shopping and dining (11%), and preserving existing neighborhoods (11%).

Question 9 *Is there a particular reason why you prefer to concentrate the additional housing in a few areas of the City?*

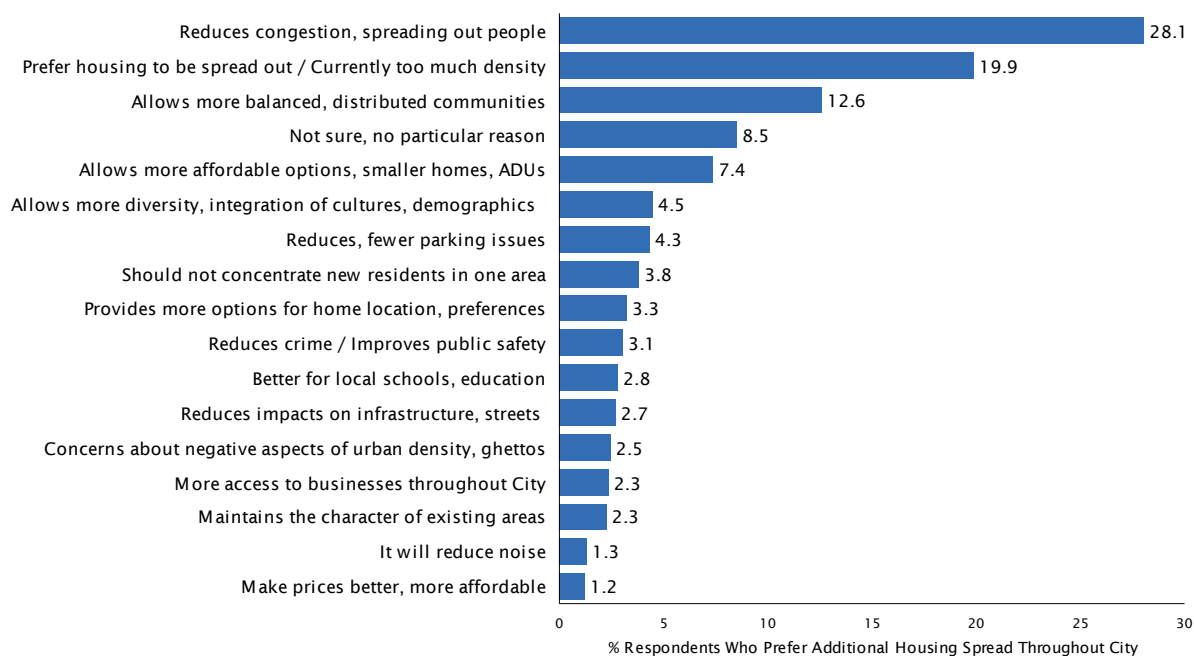
FIGURE 13 REASONS FOR PREFERRING CONCENTRATED ADDITIONAL HOUSING



Respondents who preferred that new housing be **spread** throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods cited reducing congestion and spreading people out as the main reason for their preference (28%), followed by a general preference for housing to be spread out and that there is currently too much density (20%) and that the plan allows for more balanced, distributed communities (13%, see Figure 14).

Question 10 *Is there a particular reason why you prefer to spread the additional housing throughout the City?*

FIGURE 14 REASONS FOR PREFERRING ADDITIONAL HOUSING SPREAD THROUGHOUT CITY

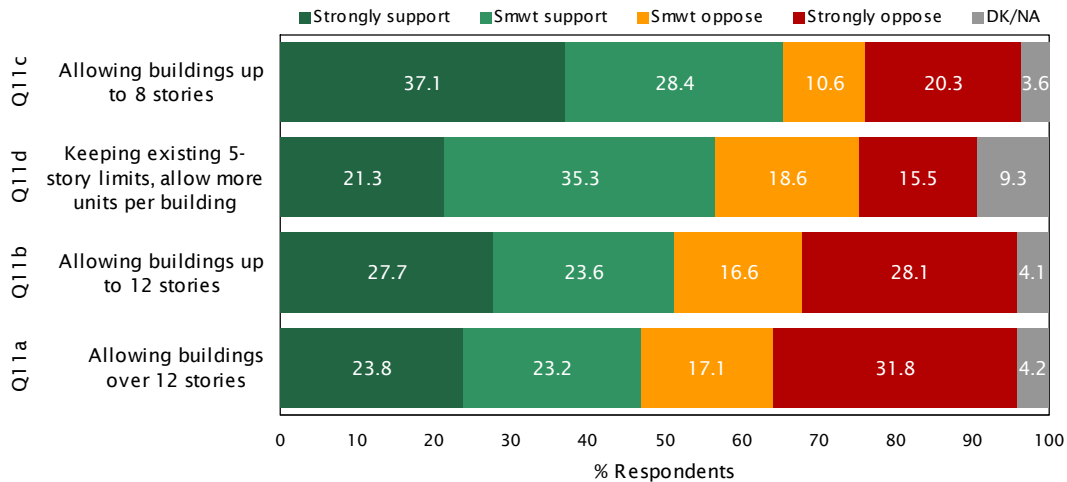


STRATEGIES TO CONCENTRATE HOUSING Having captured respondents' initial preferences regarding how best to accommodate future housing, the survey transitioned to gauging their level of support for specific strategies for concentrating (Question 11) or spreading (Question 12) housing in the City.

In most areas of the City of San Mateo, buildings are limited to 5 stories and 50 housing units per acre. To be able to **concentrate** additional housing in a few areas of the City near transit, stores and restaurants may require allowing taller buildings and/or allowing more units per acre. With this in mind, the survey asked respondents the degree to which they would support or oppose the four specific strategies for concentrating housing shown on the left of Figure 15 on the next page. A majority of respondents supported three of the four strategies tested, with support being greatest for allowing buildings up to eight stories in a few areas of the City near transit (66% strongly or somewhat support), followed by keeping existing five story building limits, but allowing more housing units within each building (57%) and allowing buildings up to 12 stories in these areas (51%). Just under half of respondents supported allowing buildings over 12 stories in these areas (47%).

Question 11 In most areas of the City of San Mateo, buildings are limited to 5 stories and 50 housing units per acre. To be able to concentrate additional housing in a few areas of the City near transit, stores and restaurants may require allowing taller buildings and/or allowing more units per acre. Keeping this in mind, would you support or oppose: _____?

FIGURE 15 SUPPORT FOR STRATEGIES TO CONCENTRATE HOUSING



The following tables present the percentage of respondents who *strongly* supported each strategy to concentrate housing by subgroups of residents. Of particular note is the strong, linear relationship between length of residence and strong support for allowing buildings up to eight stories in a few areas of the City near transit, with San Mateo's newest residents most supportive (70%) and long-time residents least supportive (23%).

TABLE 8 SUPPORT FOR STRATEGIES TO CONCENTRATE HOUSING BY YEARS IN SAN MATEO & OVERALL SATISFACTION (SHOWING % STRONGLY SUPPORT)

	Years in San Mateo (Q1)					Overall Satisfaction (Q5)		
	Less than 1	1 to 4	5 to 9	10 to 14	15 or more	Satisfied	Dissatisfied	Not sure
Allowing buildings up to 8 stories in these areas	69.5	59.1	52.0	36.5	22.5	40.2	23.9	40.9
Allowing buildings up to 12 stories in these areas	46.4	50.3	41.2	26.6	14.7	30.5	16.1	30.8
Allowing buildings over 12 stories in these areas	34.7	43.6	35.1	26.6	12.4	25.7	15.4	26.7
Keeping existing 5 story building limits, more units within	19.2	17.8	24.4	25.1	21.5	22.6	18.0	16.9

TABLE 9 SUPPORT FOR STRATEGIES TO CONCENTRATE HOUSING BY AGE & HOME OWNERSHIP STATUS (SHOWING % STRONGLY SUPPORT)

	Age (QD1)						Home Ownership Status (QD6)	
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older	Own	Rent
Allowing buildings up to 8 stories in these areas	40.5	58.9	45.1	31.9	20.9	23.5	30.5	48.3
Allowing buildings up to 12 stories in these areas	28.5	47.2	35.4	21.5	13.1	16.7	22.3	36.9
Allowing buildings over 12 stories in these areas	26.5	39.9	30.8	18.7	10.0	14.0	19.0	31.7
Keeping existing 5 story building limits, more units within	23.4	20.1	26.9	20.2	20.6	19.8	20.0	23.3

TABLE 10 SUPPORT FOR STRATEGIES TO CONCENTRATE HOUSING BY ETHNICITY & HOME TYPE (SHOWING % STRONGLY SUPPORT)

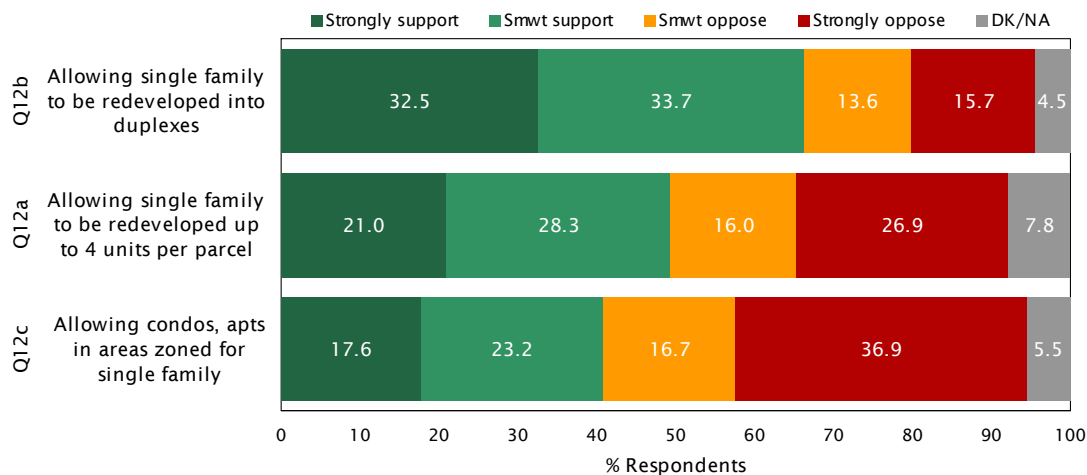
	Ethnicity (QD10)				Home Type (QD7)			
	Caucasian/White	Asian American	Latino/Hispanic	Mixed or other	Single family	Townhome	Condo	Apartment
Allowing buildings up to 8 stories in these areas	38.9	40.9	34.8	40.1	32.5	47.4	33.3	53.3
Allowing buildings up to 12 stories in these areas	29.6	32.9	21.8	31.2	22.8	41.2	30.1	38.6
Allowing buildings over 12 stories in these areas	26.1	25.7	19.4	26.8	19.8	31.3	24.0	35.3
Keeping existing 5 story building limits, more units within	20.2	21.7	22.9	24.3	22.6	14.7	19.8	23.0

STRATEGIES TO SPREAD HOUSING In a manner similar to the previous question, respondents were next informed that in order to **spread** housing throughout the City of San Mateo, the City may need to allow more units per parcel in existing residential neighborhoods. The three potential strategies tested to allow future housing to be spread throughout the City, and respondents' support for each action, are shown in Figure 16 below.

Close to two-thirds of respondents supported allowing single family homes to be redeveloped into duplexes (66%). Options that allowed for even higher density in existing residential neighborhoods, however, were met with more resistance. Just under a majority (49%) of respondents expressed support for allowing single family homes to be redeveloped with up to four units per parcel, whereas approximately four-in-ten (41%) supported allowing condominiums or apartments to be built in areas currently zoned for single family houses.

Question 12 *To be able to spread additional housing throughout the City may require allowing more units per parcel in existing residential neighborhoods. Keeping this in mind, would you support or oppose: _____?*

FIGURE 16 SUPPORT FOR STRATEGIES TO SPREAD HOUSING



For the interested reader, the following four tables present the level of *strong* support for each strategy to spread housing throughout the City by key demographic groups.

TABLE 11 SUPPORT FOR STRATEGIES TO SPREAD HOUSING BY YEARS IN SAN MATEO (SHOWING % STRONGLY SUPPORT)

	Years in San Mateo (Q1)				
	Less than 1	1 to 4	5 to 9	10 to 14	15 or more
Allowing single family homes to be redeveloped into duplexes	47.7	50.9	33.5	34.2	23.8
Allowing single family homes to be redeveloped with up to four units per parcel	29.9	38.1	21.9	20.2	13.8
Allowing condos or apartments to be built in areas zoned for single family houses	23.0	31.4	23.5	16.9	11.0

TABLE 12 SUPPORT FOR STRATEGIES TO SPREAD HOUSING BY ETHNICITY & HOME OWNERSHIP STATUS (SHOWING % STRONGLY SUPPORT)

	Ethnicity (QD10)				Home Ownership Status (QD6)	
	Caucasian/ White	Asian American	Latino/ Hispanic	Mixed or other	Own	Rent
Allowing single family homes to be redeveloped into duplexes	30.2	32.9	40.3	31.0	26.4	42.3
Allowing single family homes to be redeveloped with up to four units per parcel	18.9	20.8	25.9	21.7	13.9	31.3
Allowing condos or apartments to be built in areas zoned for single family houses	17.5	17.8	15.8	23.9	11.2	27.4

TABLE 13 SUPPORT FOR STRATEGIES TO SPREAD HOUSING BY AGE (SHOWING % STRONGLY SUPPORT)

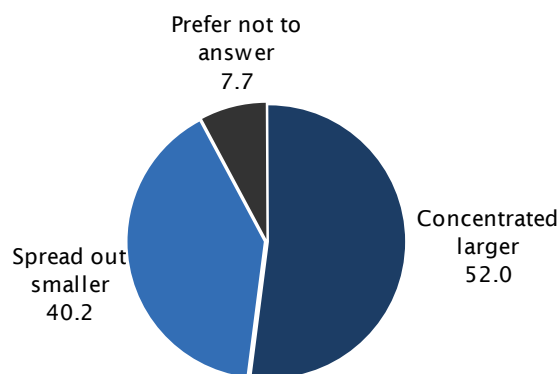
	Age (QD1)					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
Allowing single family homes to be redeveloped into duplexes	27.5	51.1	38.5	31.1	19.9	22.0
Allowing single family homes to be redeveloped with up to four units per parcel	11.0	37.9	24.8	20.6	11.0	12.5
Allowing condos or apartments to be built in areas zoned for single family houses	10.0	29.1	21.0	19.5	8.3	12.3

TABLE 14 SUPPORT FOR STRATEGIES TO SPREAD HOUSING BY OVERALL SATISFACTION & HOME TYPE (SHOWING % STRONGLY SUPPORT)

	Overall Satisfaction (Q5)			Home Type (QD7)			
	Satisfied	Dissatisfied	Not sure	Single family	Townhome	Condo	Apartment
Allowing single family homes to be redeveloped into duplexes	33.8	27.7	34.7	25.4	46.6	34.7	47.7
Allowing single family homes to be redeveloped with up to four units per parcel	21.8	16.9	24.9	14.2	35.0	21.5	36.2
Allowing condos or apartments to be built in areas zoned for single family houses	18.5	13.3	21.2	10.5	32.8	19.9	33.2

INFORMED PREFERENCE FOR FUTURE HOUSING After sharing with respondents the types of strategies that would be required to concentrate additional housing, as well as spread it throughout the City, residents were given another opportunity to share how they would prefer future housing to be accommodated in San Mateo. As shown in Figure 17, there was little change in the aggregate level of support for each approach, with 52% of residents indicating a preference for future housing to be concentrated in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants, and 40% of respondents preferring that future housing be spread throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods. Eight percent remained unwilling to share their opinion.

Question 13 *Sometimes people change their minds once they hear more about a topic, so let me ask you again: Understanding that San Mateo will be required by state law to plan for thousands of new homes, would you prefer that these homes: _____ OR _____?*

FIGURE 17 INFORMED PREFERENCE FOR FUTURE RESIDENTIAL DEVELOPMENT


It is worth noting that the aggregate stability in responses between Questions 8 and 13 masked a fair amount of offsetting movement at the individual level. Indeed, 15% of respondents made a *fundamental*³ shift in their opinion during the question series, although because the movement was largely offsetting the net impact is that the informed preferences were just one point different from the levels recorded when initially asked.

3. This is, they changed from one position or undecided at Question 8 to a different position at Question 13.

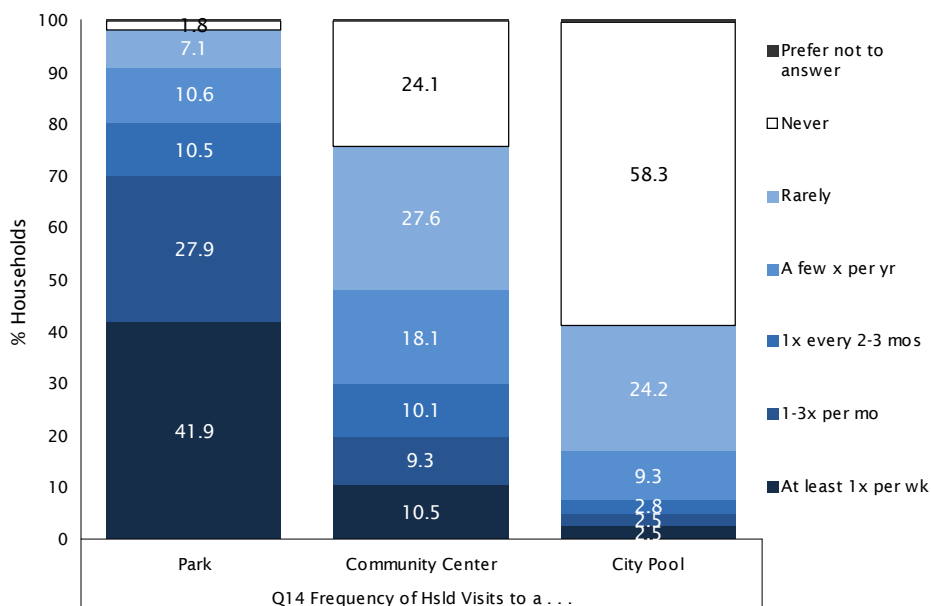
RECREATION & FACILITIES

The City of San Mateo is currently home to over 20 neighborhood and community parks, hundreds of acres of preserved open space, and numerous recreation and community facilities. This section of the report profiles residents' use of city parks, community centers, and city pools, as well as their programming interests and priorities for future spending on recreation.

FREQUENCY OF USE On a yearly basis, nearly all San Mateo households utilize city parks (98%), three-quarters utilize community centers (76%), and four-in-ten households (41%) make use of city pools (Figure 18). The *frequency* of visits is highest for parks, with 70% of residents reporting that their household visits a San Mateo park at least once per month. Twenty percent (20%) of respondents reported monthly visits to a community center by their household and 5% regularly visit a city pool at least once per month.

Question 14 *Next, I have a few questions about recreation in the City of San Mateo. How frequently do you or other members of your household _____ in the City of San Mateo? At least once per week, one to three times per month, once every two or three months, a few times per year, rarely, or never?*

FIGURE 18 FREQUENCY OF HSLD VISITS TO A...



For the interested reader, Table 15 and Table 16 on the next page show how *monthly* use varied across demographic characteristics. Most notable is the strong relationship between presence and age(s) of children in the household and activity frequency, with the highest use of parks and community centers found among those with children five years and younger. Use of city pools was comparable among those with younger and older children, with the figure much higher than households without children present.

TABLE 15 FREQUENCY OF HSLD VISITS TO A... BY ETHNICITY, HOME OWNERSHIP STATUS & ADULT OVER 65 IN HSLD (SHOWING % AT LEAST 1 PER MONTH)

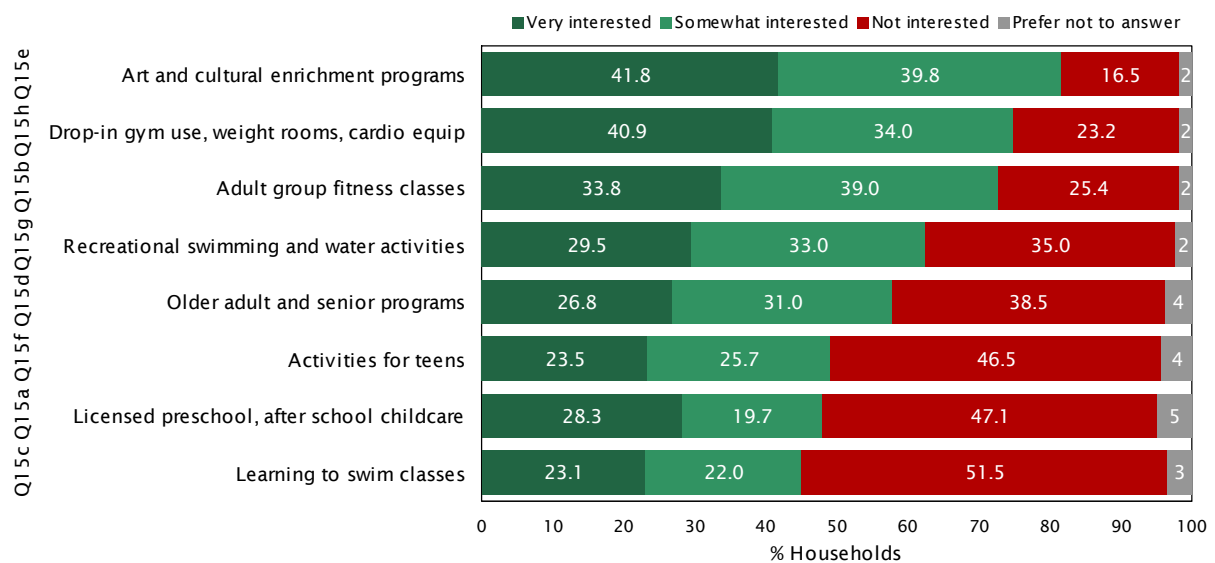
	Ethnicity (QD10)				Home Ownership Status (QD6)		Adult 65+ in Hsld (QD5)	
	Caucasian/ White	Asian American	Latino/ Hispanic	Mixed or other	Own	Rent	Yes	No
Visit a park	67.0	70.8	76.7	68.7	70.9	69.2	57.0	77.2
Visit a community center	15.8	25.2	21.0	23.1	22.2	16.9	22.3	18.5
Visit a city pool	4.8	5.0	6.3	4.2	5.9	3.8	5.8	4.8

TABLE 16 FREQUENCY OF HSLD VISITS TO A... BY OVERALL SATISFACTION & CHILD IN HSLD (SHOWING % AT LEAST 1 PER MONTH)

	Overall Satisfaction (Q5)			Child in Hsld (QD3,4)		
	Satisfied	Dissatisfied	Not sure	Yes, under 18	Yes, under 6	None
Visit a park	72.3	65.7	58.3	84.2	92.0	62.5
Visit a community center	19.7	23.1	9.6	26.9	31.0	15.4
Visit a city pool	4.6	8.3	1.4	8.4	8.4	3.1

PROGRAMMING INTERESTS The next question of the survey measured household interest in a list of specific recreation programs and activities being considered by the City. The format of the question was straightforward: respondents were asked whether they, or someone in their household, would be very interested, somewhat interested, or not interested in participating in each of the activities shown to the left of Figure 19 below.

Question 15 *The City of San Mateo is in the process of updating the recreation programs and spaces that it offers to residents. As I read a list of programs and activities, please indicate whether you or another member of your household would be very interested, somewhat interested, or not interested in participating in the activity if offered by the City.*

FIGURE 19 INTEREST IN ACTIVITIES OFFERED BY CITY

The activities are sorted in Figure 19 from high to low based on the proportion of respondents who indicated that their household was at least *somewhat* interested in participating. Among the programs and activities tested, art and cultural enrichment programs received the highest level

of household interest (82% very or somewhat interested), followed by drop-in gym use, weight rooms or cardio equipment (75%) and adult group fitness classes (73%). At the other end of the spectrum, less than half of households expressed interest in participating in learning to swim classes (45%), licensed preschool and after school childcare (48%), and activities for teens (49%).

Tables 17-18 present the percentage of respondents who were *very* interested in each activity for their household by subgroups, with the top three activities highlighted for ease of comparisons. As one might expect, activities targeted to a specific demographic group were generally rated the highest among that particular group. For example, although 28% of *all* respondents' households were very interested in licensed preschool and after school childcare, the level reached two-thirds (67%) among respondents with children under six years of age in their household. The majority of households with young children were also very interested in learning to swim classes (53%), recreational swimming and water activities (52%), and art and cultural enrichment programs (50%).

TABLE 17 INTEREST IN ACTIVITIES OFFERED BY CITY BY ETHNICITY, HOME OWNERSHIP STATUS & ADULT OVER 65 IN HSLD (SHOWING % VERY INTERESTED)

	Ethnicity (QD10)				Home Ownership Status (QD6)		Adult 65+ in HslD (QD5)	
	Caucasian/ White	Asian American	Latino/ Hispanic	Mixed or other	Own	Rent	Yes	No
Art and cultural enrichment programs	35.8	43.4	55.4	36.4	38.9	47.2	39.0	43.5
Drop-in gym use, weight rooms or cardio equipment	32.4	44.8	55.1	44.1	36.3	49.2	35.9	44.1
Adult group fitness classes	30.9	39.9	39.2	28.2	30.4	39.3	39.2	31.6
Recreational swimming and water activities	25.0	29.5	35.7	34.5	29.3	31.2	20.3	34.1
Licensed preschool and after school childcare	23.8	34.8	34.5	31.4	26.3	33.0	22.0	31.7
Older adult and senior programs	25.5	28.9	28.8	20.9	27.0	26.7	43.8	18.0
Activities for teens	16.0	25.4	35.5	23.6	23.0	25.0	21.1	24.2
Learning to swim classes	17.0	29.2	30.3	23.8	22.8	24.4	16.8	26.4

TABLE 18 INTEREST IN ACTIVITIES OFFERED BY CITY BY OVERALL SATISFACTION & CHILD IN HSLD (SHOWING % VERY INTERESTED)

	Overall Satisfaction (Q5)			Child in HslD (QD3,4)		
	Satisfied	Dissatisfied	Not sure	Yes, under 18	Yes, under 6	None
Art and cultural enrichment programs	41.8	44.2	37.8	46.8	50.2	39.8
Drop-in gym use, weight rooms or cardio equipment	39.2	43.5	49.4	43.2	44.5	40.8
Adult group fitness classes	32.4	36.5	36.8	31.6	33.5	35.4
Recreational swimming and water activities	28.9	31.4	28.7	43.9	52.4	21.1
Licensed preschool and after school childcare	28.5	26.9	26.3	41.9	66.7	21.2
Older adult and senior programs	26.2	31.0	19.9	18.8	17.0	30.9
Activities for teens	21.4	30.5	23.4	33.1	21.2	17.9
Learning to swim classes	23.0	24.6	17.2	37.5	53.0	14.8

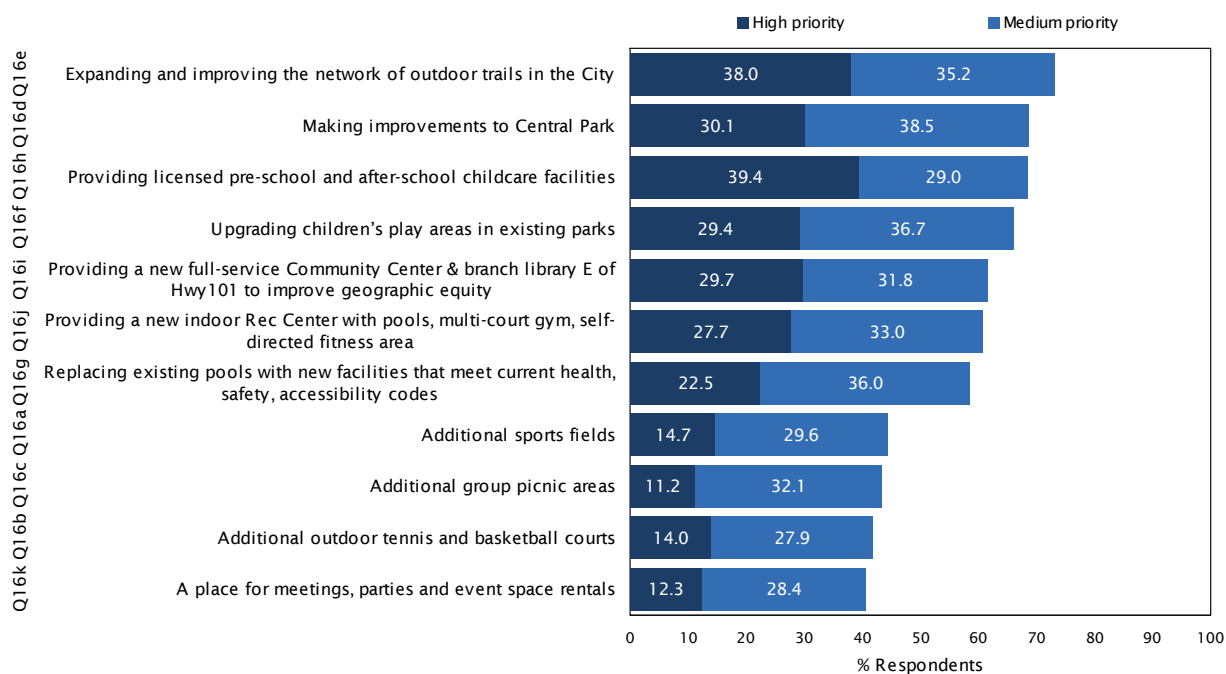
PRIORITY IMPROVEMENTS Question 16 was designed to provide the City of San Mateo with a reliable measure of how residents—as a whole—prioritize among a host of parks and recreation improvements that are being considered by the City. The format of the question was straightforward: respondents were asked whether each project shown in Figure 20 should be a high, medium, or low priority for completion as San Mateo updates its parks and recreation plans—or if the City should not spend money on the project at all. To encourage a sense of competition, respondents were instructed that not all of the projects could be high priorities.

The projects are sorted in Figure 20 from high to low based on the proportion of respondents who indicated that a project was at least a *medium* priority for completion. Among the projects tested, expanding and improving the network of outdoor trails in the City was viewed as the

highest priority (73% high or medium priority), followed by making improvements to Central Park (69%), providing licensed pre-school and after-school childcare facilities (68%), and upgrading children's play areas in existing parks (66%).

Question 16 *The City of San Mateo is updating its parks and recreation plans with the goal of improving parks and recreation facilities in the City. Because the City has limited money, however, it will need to prioritize which facilities are built or improved. As I read each of the following projects, I'd like you to indicate whether you think the project should be a high, medium or low priority. If you think the City should not spend money on a particular project, just say so. Please keep in mind that not all of the projects can be high priorities.*

FIGURE 20 RECREATION PRIORITIES



Tables 19 through 22 show how the percentage who assigned *high* priority status to different projects varied across subgroups of San Mateo residents. For ease of comparison, the top five ratings within each subgroup are highlighted green.

TABLE 19 RECREATION PRIORITIES BY YEARS IN SAN MATEO & GENDER (SHOWING % HIGH PRIORITY)

	Years in San Mateo (Q1)					Gender (QD2)	
	Less than 1	1 to 4	5 to 9	10 to 14	15 or more	Male	Female
Providing licensed pre-school and after-school childcare facilities	34.5	49.9	44.6	33.6	36.4	36.3	44.0
Expanding and improving the network of outdoor trails in the City	45.8	45.1	37.3	41.9	34.0	37.9	38.7
Making improvements to Central Park	29.8	28.5	33.2	25.1	30.8	28.3	32.2
Providing new full-service Community Center & branch library	21.8	35.6	27.8	25.0	30.0	25.4	33.8
Upgrading children's play areas in existing parks	24.3	23.0	39.8	34.1	29.0	27.0	32.6
Providing a new indoor Rec Center with pools, multi-court gym, fitness area	27.6	31.9	33.1	28.3	24.9	25.2	30.7
Replacing existing pools with new facilities that meet current codes	16.1	19.0	22.2	18.0	25.5	20.8	25.3
Additional sports fields	2.5	8.6	14.5	18.7	17.4	14.7	15.2
Additional outdoor tennis and basketball courts	6.6	13.4	11.4	14.8	15.6	12.6	15.9
A place for meetings, parties and event space rentals	8.2	10.4	5.3	9.4	15.7	9.1	15.3
Additional group picnic areas	4.8	10.4	12.1	10.6	12.3	11.2	11.4

TABLE 20 RECREATION PRIORITIES BY AGE (SHOWING % HIGH PRIORITY)

	Age (QD1)					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
Providing licensed pre-school and after-school childcare facilities	50.9	48.2	48.2	31.3	28.9	32.7
Expanding and improving the network of outdoor trails in the City	34.5	40.1	39.3	47.9	36.5	28.0
Making improvements to Central Park	24.4	26.1	35.5	39.6	26.9	27.0
Providing new full-service Community Center & branch library	37.0	34.7	36.5	30.0	15.7	24.1
Upgrading children's play areas in existing parks	11.4	20.4	45.6	32.9	28.5	26.6
Providing a new indoor Rec Center with pools, multi-court gym, fitness area	27.9	30.2	32.4	35.9	20.7	17.8
Replacing existing pools with new facilities that meet current codes	15.0	19.7	26.2	26.0	24.1	21.1
Additional sports fields	18.8	8.0	13.2	27.7	11.0	13.0
Additional outdoor tennis and basketball courts	22.3	13.8	12.6	21.3	8.0	10.7
A place for meetings, parties and event space rentals	11.9	12.3	13.6	13.9	11.8	9.6
Additional group picnic areas	13.8	8.8	10.9	16.7	7.5	11.5

TABLE 21 RECREATION PRIORITIES BY ETHNICITY & OVERALL SATISFACTION (SHOWING % HIGH PRIORITY)

	Ethnicity (QD10)				Overall Satisfaction (Q5)		
	Caucasian/ White	Asian American	Latino/ Hispanic	Mixed or other	Satisfied	Dissatisfied	Not sure
Providing licensed pre-school and after-school childcare facilities	39.5	38.2	45.3	42.4	41.4	30.3	38.8
Expanding and improving the network of outdoor trails in the City	39.4	33.6	41.5	34.9	38.3	38.2	35.2
Making improvements to Central Park	27.7	31.3	33.4	30.6	30.5	31.0	21.4
Providing new full-service Community Center & branch library	26.3	27.1	43.5	28.1	32.1	24.2	17.8
Upgrading children's play areas in existing parks	26.0	29.6	31.9	39.2	30.3	29.9	20.9
Providing a new indoor Rec Center with pools, multi-court gym, fitness area	23.3	32.6	33.8	29.2	28.0	28.0	24.1
Replacing existing pools with new facilities that meet current codes	23.6	20.6	22.3	26.9	23.3	22.6	15.5
Additional sports fields	13.2	13.6	15.8	16.9	13.9	20.6	8.1
Additional outdoor tennis and basketball courts	12.3	16.9	15.2	17.0	13.2	18.4	9.5
A place for meetings, parties and event space rentals	9.1	11.6	17.4	18.8	11.1	15.5	14.5
Additional group picnic areas	8.4	10.8	13.5	17.4	9.6	17.0	14.3

TABLE 22 RECREATION PRIORITIES BY CHILD IN HSLD, ADULT OVER 65 IN HSLD & HOME OWNERSHIP STATUS (SHOWING % HIGH PRIORITY)

	Child in Hsld (QD3,4)			Adult 65+ in Hsld (QD5)		Home Ownership Status (QD6)	
	Yes, under 18	Yes, under 6	None	Yes	No	Own	Rent
Providing licensed pre-school and after-school childcare facilities	49.0	63.5	34.9	35.3	41.9	34.2	47.5
Expanding and improving the network of outdoor trails in the City	37.7	30.7	38.5	32.0	41.0	38.9	38.1
Making improvements to Central Park	39.2	37.2	25.4	27.2	31.5	33.0	26.7
Providing new full-service Community Center & branch library	32.2	31.3	28.9	24.6	32.3	27.2	34.5
Upgrading children's play areas in existing parks	43.4	51.9	22.3	29.5	29.6	30.6	28.2
Providing a new indoor Rec Center with pools, multi-court gym, fitness area	35.3	37.4	23.9	20.5	31.3	24.8	33.4
Replacing existing pools with new facilities that meet current codes	28.2	27.0	20.1	25.3	21.4	21.8	23.6
Additional sports fields	21.5	13.1	10.8	12.4	16.2	17.3	11.8
Additional outdoor tennis and basketball courts	20.1	15.2	10.9	10.3	16.4	14.9	12.6
A place for meetings, parties and event space rentals	14.0	13.6	10.9	10.2	12.8	12.0	13.1
Additional group picnic areas	12.4	10.5	10.8	11.5	11.2	13.1	9.0

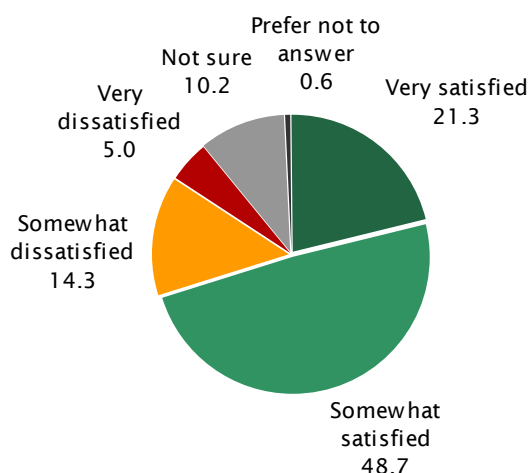
COMMUNICATIONS

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

OVERALL SATISFACTION WITH COMMUNICATION Question 17 asked San Mateo residents to report their satisfaction with city-resident communication. Overall, 70% of respondents indicated they were satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means. The remaining respondents were either dissatisfied with the City's efforts in this respect (19%) or unsure of their opinion (11%).

Question 17 *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 21 SATISFACTION WITH COMMUNICATION



The next three figures display how satisfaction with the City's efforts to communicate with residents varied by length of residence, presence and age(s) of children in the home, presence of an adult 65 years and older in the household, age of the respondent, gender, ethnicity, satisfaction with the City's overall performance in providing services, and home ownership status.

As is often the case, residents dissatisfied with the City's *overall* performance or unsure of their rating were also the least satisfied with the City's communication efforts, whereas those generally satisfied with the City were the most satisfied with city-resident communication. It is also noteworthy that newer residents (less than 1 year) and younger residents (under 25) were generally less satisfied than their counterparts with respect to city-resident communication.

FIGURE 22 SATISFACTION WITH COMMUNICATION BY YEARS IN SAN MATEO, CHILD IN HSLD & ADULT OVER 65 IN HSLD

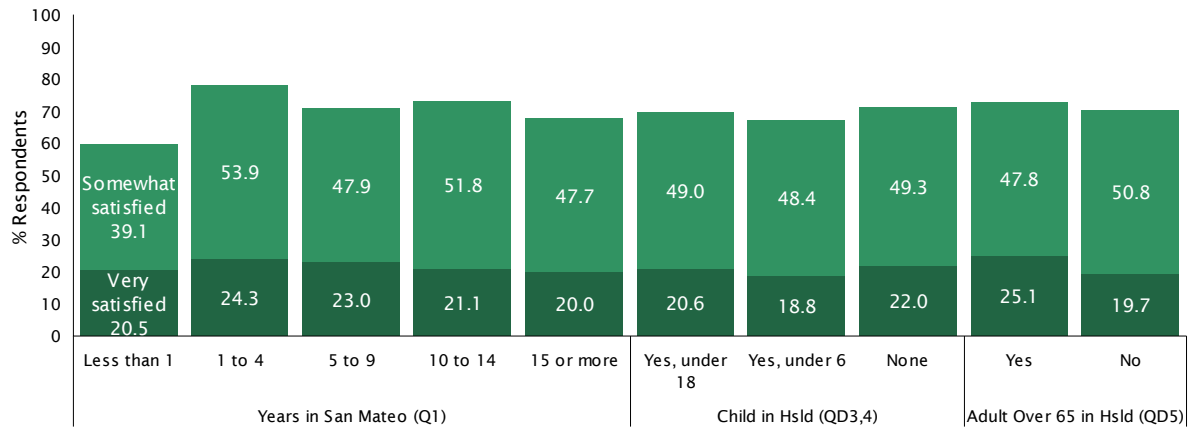


FIGURE 23 SATISFACTION WITH COMMUNICATION BY AGE & GENDER

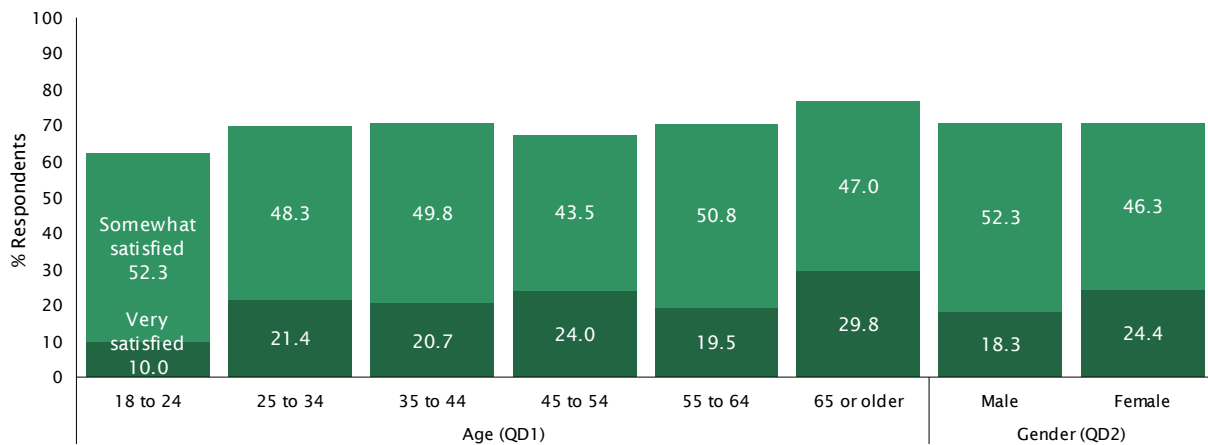
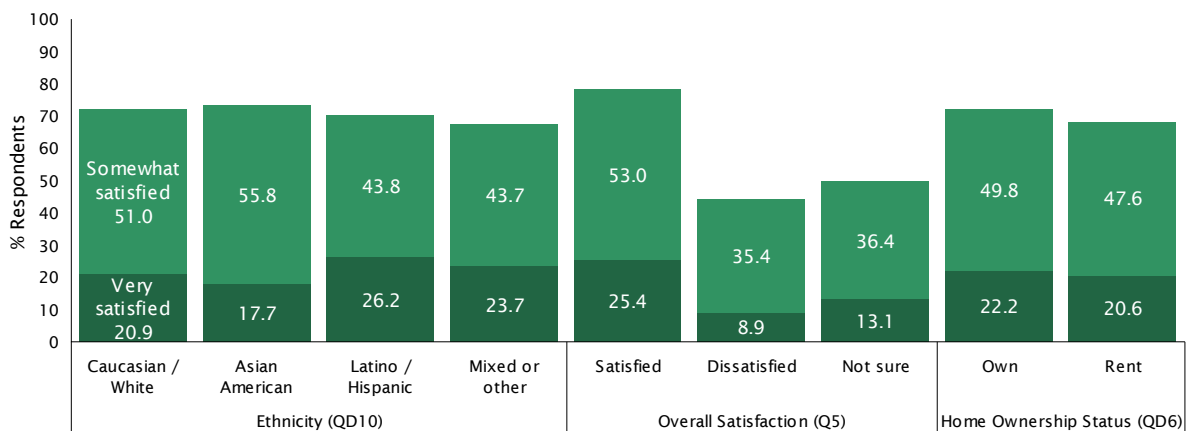


FIGURE 24 SATISFACTION WITH COMMUNICATION BY ETHNICITY, OVERALL SATISFACTION & HOME OWNERSHIP STATUS

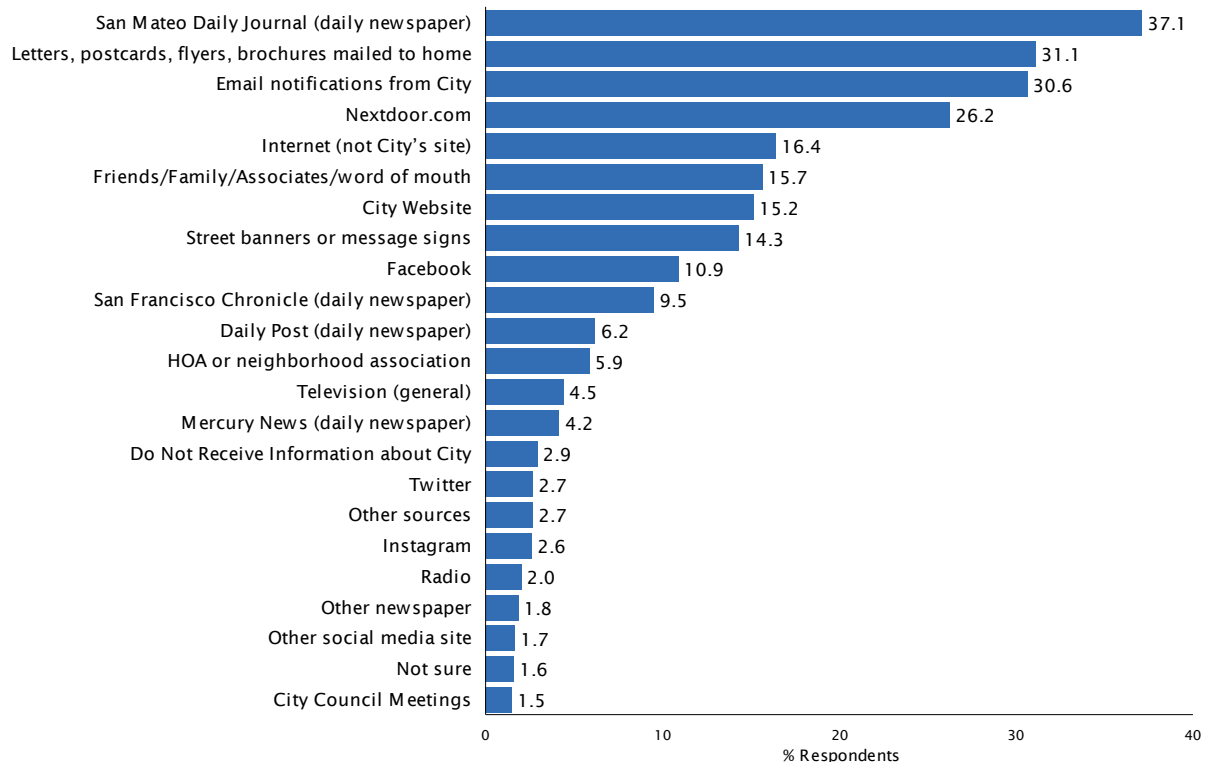


SOURCES OF INFORMATION To help the City identify the most effective means of communicating with residents, it is helpful to understand what information sources they currently rely on for this type of information. Question 18 asked respondents to identify the top three information sources they typically use to find out about City of San Mateo news, events, and programs. Because respondents were allowed to provide up to three sources, the percentages shown in Figure 25 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 San Mateo Daily Journal, mentioned by 37% of respondents. The Daily Journal was followed by letters, postcards, flyers, or brochures mailed to the home (31%), email notifications from the City (31%), and the social media website and app Nextdoor (26%).

Question 18 *What information sources do you use to find out about City of San Mateo news, events, and programs?*

FIGURE 25 INFORMATION SOURCES



Figures 26 to 28 on the next page present the information source categories by a number of key demographic traits. For ease of interpretation, the bars representing city-sponsored sources are displayed in shades of green, and non-city sources in shades of orange.

FIGURE 26 INFORMATION SOURCES BY OVERALL, AGE & SATISFACTION WITH COMMUNICATION

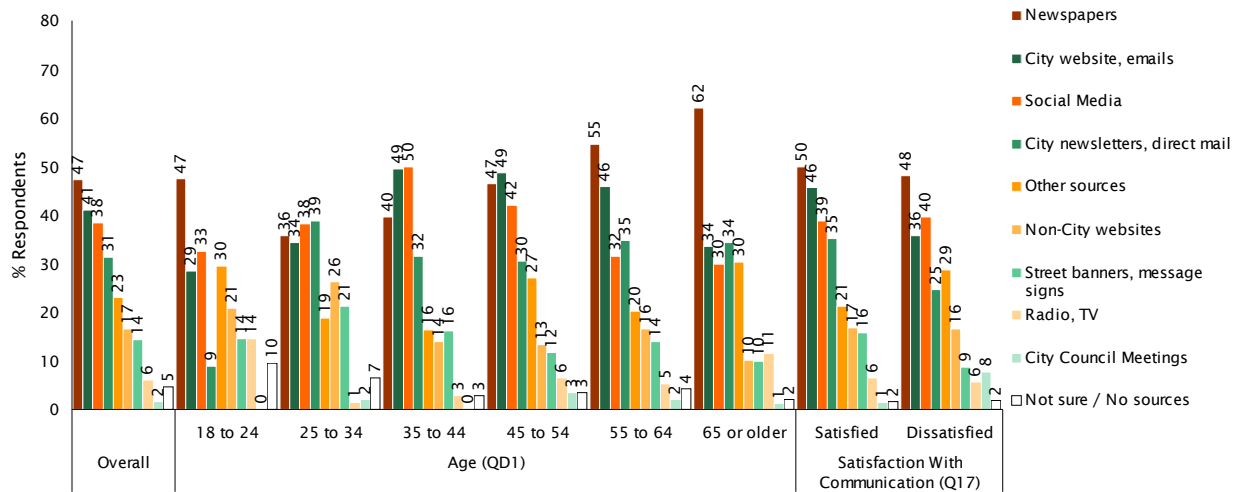


FIGURE 27 INFORMATION SOURCES BY ETHNICITY, CHILD IN HSLD & ADULT OVER 65 IN HSLD

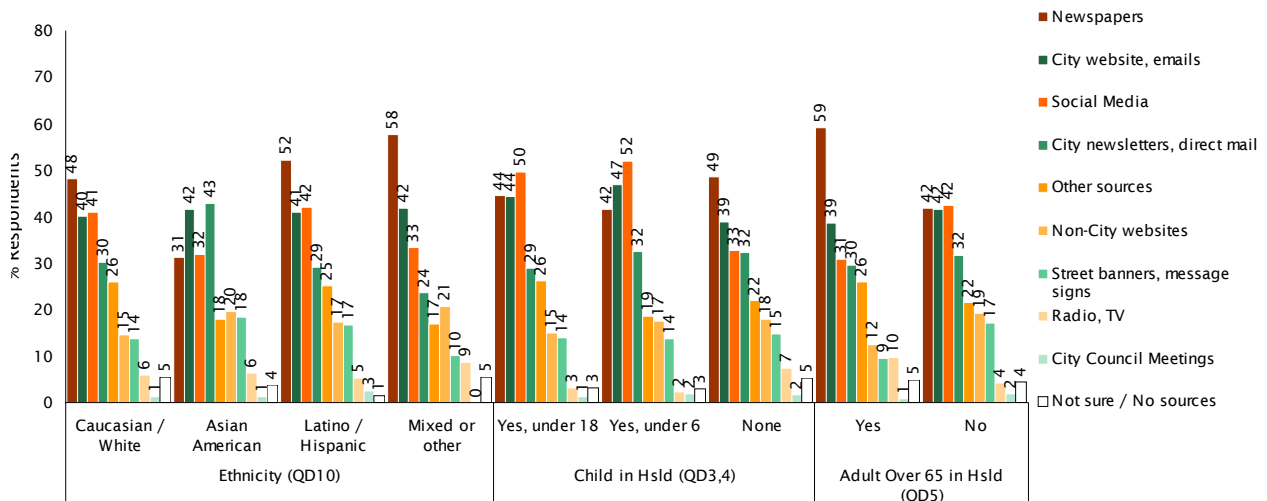
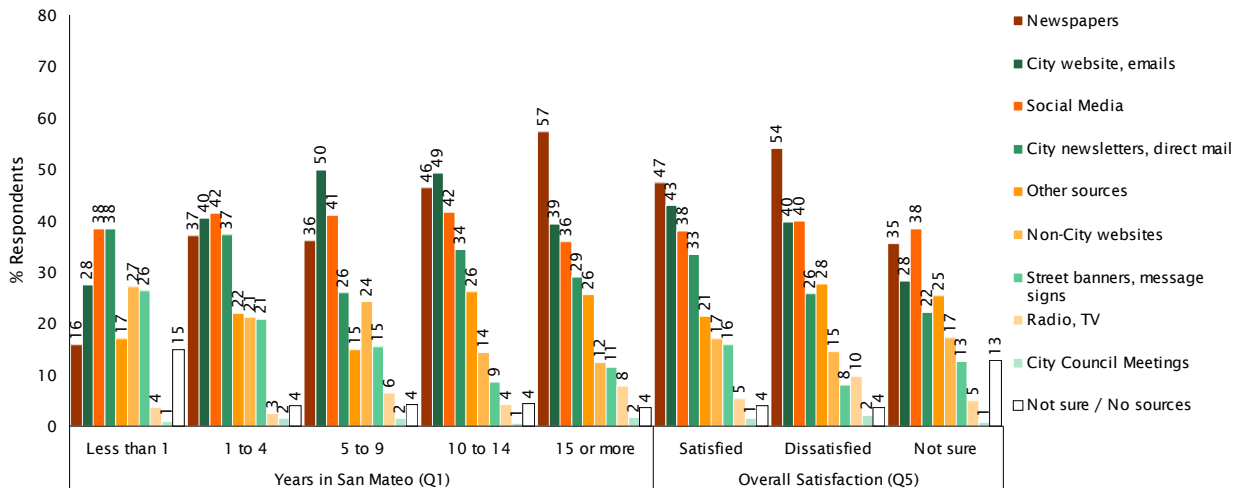


FIGURE 28 INFORMATION SOURCES BY YEARS IN SAN MATEO & OVERALL SATISFACTION



COMMUNICATION PREFERENCES The next communication-related question presented residents with the methods shown to the left of Figure 29, and asked whether each would be an effective way for the City to communicate with them. Overall, respondents indicated that email was the most effective method (88% very or somewhat effective), followed by postcards, letters, and newsletters mailed to the home (i.e., direct mail, 79%), social media like Facebook, Twitter, and Nextdoor (77%), and the City's website (69%). Television programs (40%), advertisements in local papers (43%), and town hall meetings (49%) were generally viewed by residents as less effective ways for the City to communicate with them.

Question 19 *As I read the following ways that the City of San Mateo can communicate with residents, I'd like to know if you think they would be very effective, somewhat effective, or not an effective way for the City to communicate with you.*

FIGURE 29 EFFECTIVENESS OF COMMUNICATION METHODS

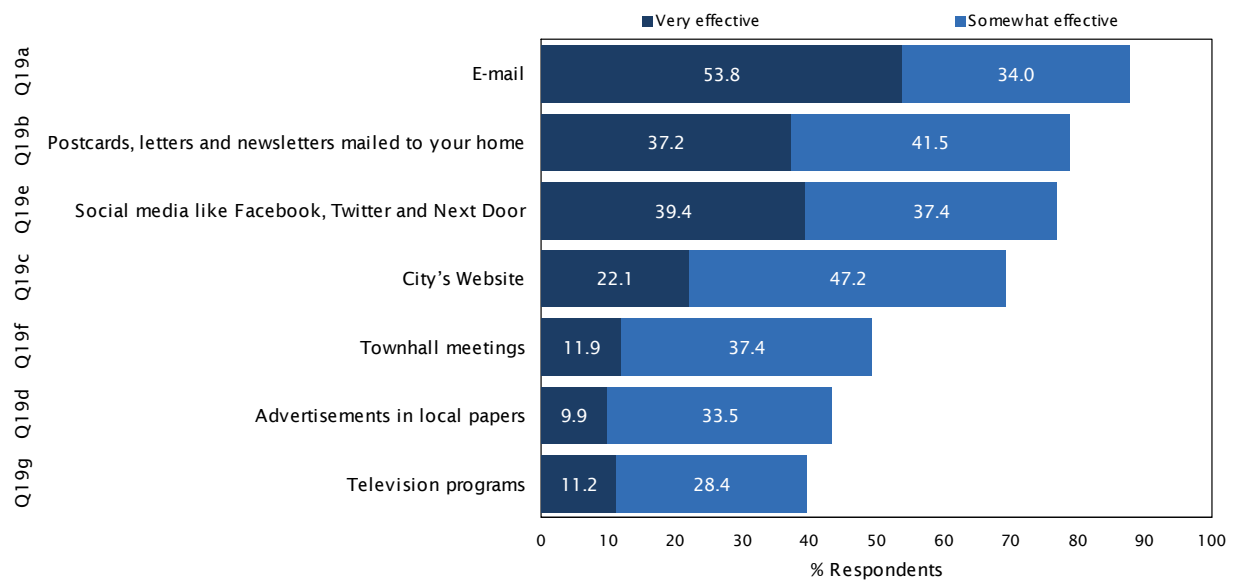


Table 23 below and the two tables on the next page show how the percentage of residents that rated each communication method as *very effective* varied depending on their age, satisfaction with the City's overall efforts to provide municipal services, ethnicity, presence and age(s) of children in the home, and satisfaction with city-resident communication.

TABLE 23 EFFECTIVENESS OF COMMUNICATION METHODS BY AGE (SHOWING % VERY EFFECTIVE)

	Age (QD1)					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
E-mail	57.6	57.6	54.6	56.9	55.6	47.3
Social media like Facebook, Twitter and Next Door	47.8	47.8	45.9	41.5	27.2	25.0
Postcards, letters and newsletters mailed to your home	26.1	26.1	36.5	37.4	41.7	39.7
City's Website	14.5	14.5	22.0	24.7	25.3	21.5
Townhall meetings	10.9	10.9	9.0	12.9	13.9	14.5
Television programs	24.5	24.5	9.6	8.0	10.4	9.1
Advertisements in local papers	15.6	15.6	3.6	8.2	9.4	18.9

TABLE 24 EFFECTIVENESS OF COMMUNICATION METHODS BY OVERALL SATISFACTION & ETHNICITY (SHOWING % VERY EFFECTIVE)

	Overall Satisfaction (Q5)			Ethnicity (QD10)			
	Satisfied	Dissatisfied	Not sure	Caucasian/ White	Asian American	Latino/ Hispanic	Mixed or other
E-mail	55.9	44.6	55.1	54.1	54.5	55.3	51.5
Social media like Facebook, Twitter and Next Door	41.0	33.6	37.1	36.5	41.1	46.1	42.5
Postcards, letters and newsletters mailed to your home	39.7	31.9	25.4	38.0	34.6	38.7	33.8
City's Website	23.1	22.3	14.8	19.0	17.7	26.2	28.9
Townhall meetings	11.9	12.0	13.2	12.0	8.1	14.1	13.5
Television programs	10.6	12.1	15.4	5.5	6.8	21.7	21.6
Advertisements in local papers	10.3	10.1	6.3	9.7	4.7	14.9	10.7

TABLE 25 EFFECTIVENESS OF COMMUNICATION METHODS BY CHILD IN HSLD & SATISFACTION WITH COMMUNICATION (SHOWING % VERY EFFECTIVE)

	Child in Hsld (QD3,4)			Satisfaction With Communication (Q17)	
	Yes, under 18	Yes, under 6	None	Satisfied	Dissatisfied
E-mail	59.6	62.1	51.4	56.8	52.2
Social media like Facebook, Twitter and Next Door	48.1	56.0	35.4	42.7	32.9
Postcards, letters and newsletters mailed to your home	37.0	37.5	36.6	40.1	35.7
City's Website	22.5	25.9	20.9	24.2	18.2
Townhall meetings	11.7	11.1	12.0	13.4	10.2
Television programs	12.2	15.1	10.3	11.4	12.2
Advertisements in local papers	8.9	8.0	10.6	10.1	13.0



BACKGROUND & DEMOGRAPHICS

TABLE 26 DEMOGRAPHICS OF SAMPLE

Total Respondents	1,276
Years in San Mateo (Q1)	
Less than 1	5.8
1 to 4	18.5
5 to 9	12.8
10 to 14	10.1
15 or more	52.4
Prefer not to answer	0.4
Age (QD1)	
18 to 24	9.0
25 to 34	20.5
35 to 44	21.0
45 to 54	16.8
55 to 64	12.8
65 or older	15.7
Prefer not to answer	4.2
Child in Hsld (QD3,4)	
Yes, under 18	34.3
Yes, under 6	16.5
None	60.5
Prefer not to answer	5.2
Adult Over 65 in Hsld (QD5)	
Yes	32.1
No	63.0
Prefer not to answer	4.9
Home Ownership Status (QD6)	
Own	56.7
Rent	40.1
Prefer not to answer	3.2
Home Type (QD7)	
Single family	60.1
Townhome	8.4
Condo	9.6
Apartment	18.5
Prefer not to answer	3.3
Anticipated Years in San Mateo (QD8)	
Less than 5	20.0
5 to 10	25.2
11 to 15	10.5
16 or more	33.7
Prefer not to answer	10.5
Employment Status (QD9)	
Full-time	63.4
Part-time	5.3
Student	5.4
Homemaker	2.5
Retired	15.6
Between jobs	2.2
Prefer not to answer	5.5
Ethnicity (QD10)	
Caucasian / White	39.8
Asian American	18.3
Latino / Hispanic	23.5
Mixed or other	10.4
Prefer not to answer	8.0
Gender	
Male	45.2
Female	50.5
Not listed	0.6
Prefer not to answer	3.7

Table 26 presents the key demographic information collected during the survey. The primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics, and to ensure that the resulting sample matched the profile of San Mateo's adult population on key characteristics.



M E T H O D O L O G Y

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

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

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents who preferred that new housing be concentrated in a few larger developments and located in areas of the City that are close to transit, stores, and restaurants (Question 8) were asked if there was a particular reason why they preferred that additional housing be concentrated (Question 9). The questionnaire included with this report (see *Questionnaire & Toplines* on page 42) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

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

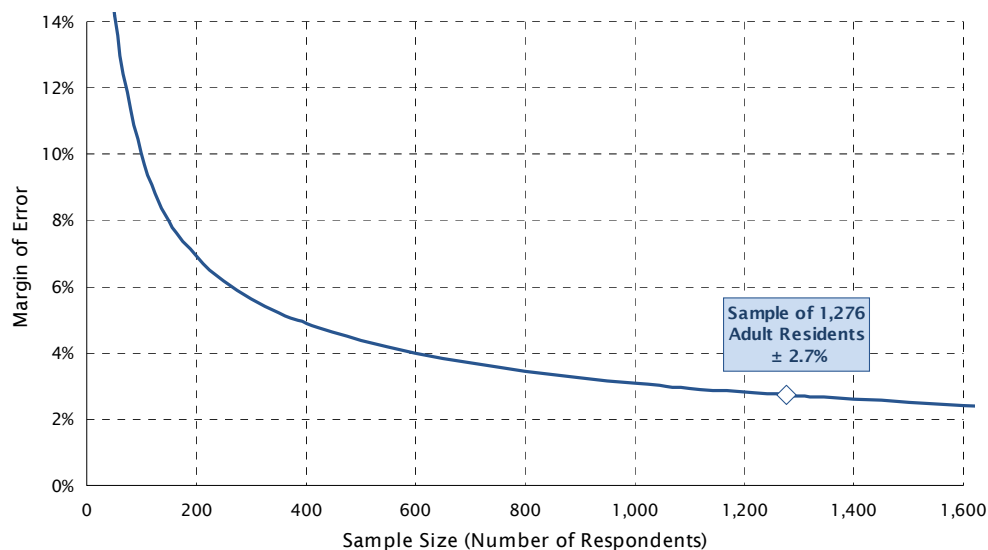
SAMPLE, RECRUITING & DATA COLLECTION A comprehensive database of households in the City of San Mateo was utilized for this study, ensuring that all households in San Mateo had the opportunity to participate in the survey. After random selection, households were recruited to participate in the survey using a combination of mailed letters, email invitations and telephone calls to both land lines and mobile lines, as appropriate. Both the mailed and email invitations contained a unique passcode so that only those invited could access the secure survey site, and they could complete the survey one-time only. Following a period of online data collection, True North began placing telephone calls to land lines and mobile phone numbers of households that had yet to participate in the online survey as a result of the mailed and/or emailed invitations, or for which only telephone contact information was available.

Telephone interviews averaged 18 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM). It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would bias the sample. A total of 1,276 completed surveys were gathered online and by telephone between January 27 and February 6, 2020.

MARGIN OF ERROR DUE TO SAMPLING The results of the survey can be used to estimate the opinions of all adult residents of the City. Because not every adult resident of the City participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 1,276 adult residents for a particular question and what would have been found if all of the estimated 81,720 adult residents⁴ had been interviewed.

Figure 30 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is $\pm 2.7\%$ for questions answered by all 1,276 respondents.

FIGURE 30 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by demographic characteristics such as length of residence and age of the respondent. Figure 30 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

4. Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates.

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

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that add to more than or less than 100%.

QUESTIONNAIRE & TOPLINES



City of San Mateo
Community Opinion Survey
Final Toplines (n=1,276)
February 2020

Section 1: Introduction to Study

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

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

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

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

Section 2: Quality of Life

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

Q1 How long have you lived in the City of San Mateo?

1	Less than 1 year	6%
2	1 to 4 years	19%
3	5 to 9 years	13%
4	10 to 14 years	10%
5	15 years or longer	52%
99	Prefer not to answer	0%

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

		Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
	<i>Always ask A first, then randomize remaining items</i>							
A	The overall quality of life in the City of San Mateo	21%	60%	16%	3%	1%	0%	0%
B	San Mateo as a place to raise a family	22%	43%	19%	5%	3%	7%	2%
C	San Mateo as a place to work	17%	40%	17%	3%	2%	18%	3%
D	San Mateo as a place to retire	9%	21%	24%	17%	13%	14%	1%
E	San Mateo as a place to shop and dine	24%	48%	23%	3%	2%	0%	0%
F	San Mateo as a place to recreate	14%	42%	29%	6%	3%	5%	1%

Q3	What do you like most about the City of San Mateo that should be preserved in the future? Verbatim responses recorded and later grouped into categories shown below.	
	Parks, recreation facilities, opportunities	25%
	Shopping, dining opportunities	14%
	Not sure / Cannot think of anything specific	14%
	Small town atmosphere	11%
	Proximity to surrounding cities, areas	10%
	Open, green space, mountains	8%
	Diversity of businesses, cultures, activities	8%
	Downtown area	7%
	Low crime, public safety	6%
	Sense of community	4%
	Friendly people, neighbors	4%
	Clean, well-maintained	4%
	Less crowded, traffic than other cities	4%
	Access to bay, ocean	3%
	Weather, clean air	3%
	Good schools	3%
	Access to public transportation	3%
	Public libraries	3%
	Historical places	2%
	Well maintained infrastructure	2%
Q4	If the city government could change one thing to make San Mateo a better place to live now and in the future, what change would you like to see? Verbatim responses recorded and later grouped into categories shown below.	
	Provide more affordable housing	24%
	Reduce traffic congestion	19%
	Limit growth, preserve open space	16%
	Improve, maintain infrastructure, roads	10%
	Improve parking	9%
	Not sure / Cannot think of anything specific	8%
	Improve public transit	6%
	Reduce cost of living	5%
	Improve public safety	4%
	Improve, add parks, rec facilities	4%
	Improve downtown area	4%

Improve schools, education	4%
Provide more shopping, dining opportunities	4%
Beautify, clean up City	3%
Improve economy, jobs	3%
No changes needed / Everything is fine	3%
Improve environmental efforts	2%
Reduce taxes, fees	2%
Provide more bike lanes	2%

Section 3: City Services

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

Q5	Generally speaking, are you satisfied or dissatisfied with the job the City of San Mateo is doing to provide city services? <i>Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>							
	1	Very satisfied	19%					
	2	Somewhat satisfied	54%					
	3	Somewhat dissatisfied	12%					
	4	Very dissatisfied	5%					
	98	Not sure	8%					
	99	Prefer not to answer	1%					
Q6	For each of the services I read next, 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 and crime prevention services		31%	41%	11%	4%	12%	1%
B	Promote economic development to attract new businesses and good-paying jobs to the community		13%	38%	19%	8%	19%	3%
C	Prepare the city for emergencies and natural disasters		14%	32%	12%	4%	36%	2%
D	Provide fire protection, prevention and emergency medical services		40%	38%	3%	1%	18%	1%
E	Manage traffic congestion		4%	25%	31%	36%	4%	0%
F	Address homelessness		9%	30%	23%	14%	22%	2%

G	Maintain public buildings and facilities like City Hall, libraries and parking garages	39%	46%	6%	2%	6%	1%
H	Maintain local streets and roads	14%	39%	26%	19%	2%	0%
I	Maintain storm drains, sewers and creeks	20%	46%	15%	7%	11%	0%
J	Provide parks, sports fields and recreation facilities	40%	47%	8%	3%	2%	1%
K	Provide a variety of recreation programs for all ages	29%	43%	11%	3%	14%	1%
L	Provide special events like community festivals and holiday celebrations	27%	45%	13%	3%	12%	1%
M	Enforce code violations to address issues like abandoned vehicles, non-permitted construction, and yards not being properly maintained	32%	18%	11%	23%	2%	32%

Section 4: Housing & Building

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

Q7 As I read the following housing types, please tell me whether you feel there is currently too much, about the right amount, or too little of this type of housing in the City of San Mateo.

		Too Much	About Right	Too Little	Not sure	Prefer not to answer
	<i>Randomize</i>					
A	Housing that is affordable for middle-income families	4%	17%	71%	7%	1%
B	Housing that is affordable for low-income families	7%	11%	67%	13%	2%
Q8	California State law requires that all cities plan for additional housing. With a general shortage of housing in California, it is expected the State will require the City of San Mateo to plan for thousands of new housing units.					
	Understanding that San Mateo will be required by law to plan for thousands of new homes, would you prefer that these homes: _____ OR _____? <i>Randomize order of options 1 & 2.</i>					
1	Be concentrated in a few larger developments and located in areas of the City that are close to transit, stores and restaurants	51%				
2	Be spread throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods	41%				
99	Prefer not to answer	8%				

Ask Q9 if Q8 = 1.

Q9	Is there a particular reason why you prefer to concentrate the additional housing in a few areas of the City? Verbatim responses recorded and later grouped into categories shown below.	
	Easier access to public transportation	33%
	Reduces traffic, fewer cars on the road	26%
	Preserves more open space, limits sprawl	15%
	Better access to shopping, dining	11%
	Preserves existing neighborhoods	10%
	Convenient locations, walkability	8%
	Not sure, no particular reason	8%
	Reduces parking issues	5%
	Strengthens local economy	4%
	Improves accessibility to jobs, limits commute	4%
	Allows better, cohesive planning	4%
	More cost effective, affordable housing	3%
	Improves quality of life	3%
	Easier to provide community services	3%
	Will keep the area vibrant, lively	2%
	Better for the environment	2%
	Will preserve, improve property values	2%
	It's the more effective, efficient option	2%
	Better access to nearby to schools	2%

Ask Q10 if Q8 = 2.

Q10	Is there a particular reason why you prefer to spread the additional housing throughout the City? Verbatim responses recorded and later grouped into categories shown below.	
	Reduces congestion, spreading out people	28%
	Prefer housing to be spread out / Currently too much density	20%
	Allows more balanced, distributed communities	13%
	Not sure, no particular reason	9%
	Allows more affordable options, smaller homes, ADUs	7%
	Allows more diversity, integration of cultures, demographics	4%
	Reduces, fewer parking issues	4%
	Should not concentrate new residents in one area	4%

City of San Mateo Community Opinion Survey

February 2020

	Provides more options for home location, preferences	3%					
	Reduces crime / Improves public safety	3%					
	Better for local schools, education	3%					
	Reduces impacts on infrastructure, streets	3%					
	Concerns about negative aspects of urban density, ghettos	2%					
	More access to businesses throughout City	2%					
	Maintains the character of existing areas	2%					
Q11	In most areas of the City of San Mateo, buildings are limited to 5 stories and 50 housing units per acre. To be able to concentrate additional housing in a few areas of the City near transit, stores and restaurants may require allowing taller buildings and/or allowing more units per acre.						
	Keeping this in mind, would you support or oppose: _____? <i>Get answer, then ask: Would that be strongly (support/oppose) or somewhat (support/oppose)?</i>						
	<i>Read in Order. If 'yes' to item, code 'yes' for remaining items in Height Group and go to item D.</i>	Strongly Support	Somewhat Support	Somewhat Oppose	Strongly Oppose	No Opinion/ Not Sure	Prefer not to answer
Height Group							
A	Allowing buildings <i>over</i> 12 stories in these areas	24%	23%	17%	32%	4%	0%
B	Allowing buildings <i>up to</i> 12 stories in these areas	28%	24%	17%	28%	4%	0%
C	Allowing buildings <i>up to</i> 8 stories in these areas	37%	28%	11%	20%	3%	1%
Units Group							
D	Keeping existing 5 story building limits, but allowing more housing units within each building	21%	35%	19%	16%	9%	0%
Q12	To be able to spread additional housing throughout the City may require allowing more units per parcel in existing residential neighborhoods.						
	Keeping this in mind, would you support or oppose: _____? <i>Get answer, then ask: Would that be strongly (support/oppose) or somewhat (support/oppose)?</i>						
	<i>Read in Order. If 'yes' to item A, skip B.</i>	Strongly Support	Somewhat Support	Somewhat Oppose	Strongly Oppose	Not Sure	Prefer not to answer
A	Allowing single family homes to be redeveloped with up to four units per parcel	21%	28%	16%	27%	7%	0%
B	Allowing single family homes to be redeveloped into duplexes	33%	34%	14%	16%	4%	0%
C	Allowing condominiums or apartments to be built in areas currently zoned for single family houses	18%	23%	17%	37%	5%	0%

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Page 6

Q13	Sometimes people change their minds once they hear more about a topic, so let me ask you again:		
	Understanding that San Mateo will be required by state law to plan for thousands of new homes, would you prefer that these homes: _____ OR _____? <i>Randomize order of options 1 & 2.</i>		
	1	Be concentrated in a few larger developments and located in areas of the City that are close to transit, stores and restaurants	52%
	2	Be spread throughout the City by having smaller infill projects and allowing for more housing units per parcel within existing residential neighborhoods	40%
	99	Prefer not to answer	8%

Section 5: Recreation & Facilities

Next, I have a few questions about recreation in the City of San Mateo.

Q14	How frequently do you or other members of your household _____ in the City of San Mateo? At least once per week, one to three times per month, once every two or three months, a few times per year, rarely, or never?							
	<i>Randomize</i>	At least 1 time per week	1 to 3 times per month	Once every 2 to 3 months	A few times per year	Rarely	Never	Prefer not to answer
A	Visit a park	42%	28%	11%	11%	7%	2%	0%
B	Visit a community center	11%	9%	10%	18%	28%	24%	0%
C	Visit a city pool	2%	2%	3%	9%	24%	58%	0%
Q15	The City of San Mateo is in the process of updating the recreation programs and spaces that it offers to residents. As I read a list of programs and activities, please indicate whether you <i>or another member of your household</i> would be very interested, somewhat interested, or not interested in participating in the activity if offered by the City. Here is the (first/next) one: _____.							
	<i>Randomize</i>	Very Interested	Somewhat Interested	Not Interested	Prefer not to answer			
A	Licensed preschool and after school childcare	28%	20%	47%	5%			
B	Adult group fitness classes	34%	39%	25%	2%			
C	Learning to swim classes	23%	22%	51%	3%			
D	Older adult and senior programs	27%	31%	38%	4%			
E	Art and cultural enrichment programs	42%	40%	17%	2%			
F	Activities for teens	23%	26%	47%	4%			

G	Recreational swimming and water activities	30%	33%	35%	2%		
H	Drop-in gym use, weight rooms or cardio equipment	41%	34%	23%	2%		
Q16	The City of San Mateo is updating its parks and recreation plans with the goal of improving parks and recreation facilities in the City. Because the City has limited money, however, it will need to prioritize which facilities are built or improved. As I read each of the following projects, I'd like you to indicate whether you think the project should be a high, medium or low priority. If you think the City should not spend money on a particular project, just say so. Please keep in mind that not all of the projects can be high priorities. Here is the (first/next) one: _____. Should this project be a high, medium or low priority – or should the City not spend money on this project?						
	<i>Randomize</i>	High Priority	Medium Priority	Low Priority	Should not spend money on project	No Opinion	Prefer not to answer
A	Additional sports fields	15%	30%	39%	10%	6%	1%
B	Additional outdoor tennis and basketball courts	14%	28%	40%	12%	4%	1%
C	Additional group picnic areas	11%	32%	40%	12%	4%	1%
D	Making improvements to Central Park	30%	38%	23%	4%	4%	1%
E	Expanding and improving the network of outdoor trails in the City	38%	35%	19%	4%	3%	1%
F	Upgrading children's play areas in existing parks	29%	37%	22%	4%	6%	1%
G	Replacing existing pools with new facilities that meet current health, safety and accessibility codes	23%	36%	26%	8%	6%	1%
H	Providing licensed pre-school and after-school childcare facilities	39%	29%	16%	8%	6%	2%
I	Providing a new full-service Community Center and branch library east of highway 101 (one-oh-one) to improve geographic equity	30%	32%	22%	10%	5%	1%
J	Providing a new indoor Recreation Center with pools, multi-court gym, and self-directed fitness area	28%	33%	24%	11%	3%	1%
K	A place for meetings, parties and event space rentals	12%	28%	38%	15%	5%	1%

Section 6: Communications		
Q17	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	21%
	2 Somewhat satisfied	49%
	3 Somewhat dissatisfied	14%
	4 Very dissatisfied	5%
	98 No Opinion/Not Sure	10%
	99 Prefer not to answer	1%
Q18	What information sources do you use to find out about City of San Mateo news, events, and programs? <i>Don't read list. Record up to first 3 responses.</i>	
Newspapers		
	1 <i>San Francisco Chronicle</i> (daily newspaper)	10%
	2 <i>Mercury News</i> (daily newspaper)	4%
	3 <i>San Mateo Daily Journal</i> (daily newspaper)	37%
	4 <i>Daily Post</i> (daily newspaper)	6%
	5 <i>Other newspaper</i>	2%
City Sources		
	6 City Website	15%
	7 Email notifications from City	31%
	8 Letters, postcards, flyers or brochures mailed from City to your home	31%
	9 Street banners or message signs	14%
	10 City Council Meetings	2%
Internet & Social Media		
	11 Internet (not City's site)	16%
	12 Facebook	11%
	13 Twitter	3%
	14 Instagram	3%
	15 Other social media site	2%
	16 Nextdoor.com	26%
	17 Blogs	0%
Other		
	18 Television (general)	4%
	19 Radio	2%

City of San Mateo Community Opinion Survey

February 2020

20	HOA or neighborhood association	6%
21	Friends/Family/Associates/word of mouth	16%
22	Other	3%
23	Do Not Receive Information about City	3%
98	Not sure	2%
99	Prefer not to answer	0%
Q19	As I read the following ways that the City of San Mateo can communicate with residents, I'd like to know if you think they would be very effective, somewhat effective, or not an effective way for the City to communicate with you.	
	<i>Randomize</i>	<div>Very Effective</div> <div>Somewhat Effective</div> <div>Not Effective</div> <div>Not Sure</div> <div>Prefer not to answer</div>
A	Email	54% 34% 7% 4% 1%
B	Postcards, letters and newsletters mailed to your home	37% 42% 16% 4% 1%
C	City's Website	22% 47% 22% 7% 2%
D	Advertisements in local papers	10% 33% 48% 7% 1%
E	Social media like Facebook, Twitter and Next Door	39% 37% 15% 7% 2%
F	Townhall meetings	12% 37% 37% 12% 2%
G	Television programs	11% 28% 49% 10% 2%

Section 7: 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 birth recorded into categories shown below.	
	18 to 24	9%
	25 to 34	20%
	35 to 44	21%
	45 to 54	17%
	55 to 64	13%
	65 or older	16%
	Prefer not to answer	4%

D2	What is your gender?			
	1	Male	45%	
	2	Female	51%	
	3	Not listed	1%	
	99	Prefer not to answer	4%	
D3	Do you have one or more children under the age of 18 living in your household?			
	1	Yes	34%	Ask D4
	2	No	60%	Skip to D5
	99	Prefer not to answer	5%	Skip to D5
D4	Do you have one or more children under the age of six living in your household?			
	1	Yes	48%	
	2	No	51%	
	99	Prefer not to answer	1%	
D5	Do you have one or more adults 65 years of age or older in your household?			
	1	Yes	32%	
	2	No	63%	
	99	Prefer not to answer	5%	
D6	Do you own or rent your residence in San Mateo?			
	1	Own	57%	
	2	Rent	40%	
	99	Prefer not to answer	3%	
D7	Which of the following best describes your current home?			
	1	Single family detached home	60%	
	2	Townhome	8%	
	3	Condominium	10%	
	4	Apartment	19%	
	99	Prefer not to answer	3%	

D8	How many more years do you anticipate that you will be living in the City of San Mateo?		
	1	Less than 5 years	20%
	2	5 to 10 years	25%
	3	11 to 15 years	11%
	4	16 years or more	34%
	99	Prefer not to answer	11%
D9	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	63%
	2	Employed part-time	5%
	3	Student	5%
	4	Homemaker	3%
	5	Retired	16%
	6	In-between jobs	2%
	99	Prefer not to answer	6%
D10	What ethnic group do you consider yourself a part of or feel closest to? <i>Read list if respondent hesitates.</i>		
	1	Caucasian/White	40%
	2	Asian -- Korean, Chinese, Vietnamese, Japanese, Filipino or other Asian	18%
	3	Indian (India)	2%
	4	Latino/Hispanic/Mexican	24%
	5	African-American/Black	2%
	6	Native American Indian or Alaskan Native	0%
	7	Pacific Islander	1%
	8	Mixed Heritage	4%
	9	Other	2%
	99	Prefer not to answer	8%
Those are all of the questions that I have for you! Thanks so much for participating in this important survey! This survey was conducted for the City of San Mateo			