Community Opinion Survey
Summary Report

Prepared for the
City of San Mateo







February 21, 2022

TrueNorth Research
1592 N Coast Highway 101
Encinitas CA 92024
760.632.9900 www.tn-research.com

THIS PAGE INTENTIONALLY LEFT BLANK

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
Statistical Significance 2
Organization of Report 2
Acknowledgements 2
Disclaimer 3
About True North 3
Just the Facts 4
Quality of Life 4
City Services 4
Housing & Land Use 5
Mobility 5
Communications 5
Conclusions 7
Quality of Life 10
Overall Quality of Life 10
Question 2 10
What do You Like Most About Living in San Mateo? 11
Question 3 12
What Should Be Changed? 13
Question 4 13
City Services 15
Overall Satisfaction 15
Question 5 15
Specific Services 17
Question 6 17
Differentiators of Opinion 18
housing & Land Use 20
Affordable Housing 20
Question 7 20
Factors to Prioritize when Planning Housing 21
Question 8 22
Building Height & Density Trade-offs 26
Question 9 27
Question 10 27
Mobility 29
Frequency of Mode Use 29
Question 11 29
Strategies to Reduce Future Congestion 30
Question 12 31
Active Transportation Trade-Offs 33
Question 13 34
Communications 37
Overall Satisfaction With Communication 37
Question 14 37
Topics of Interest 39
Question 15 39
Question 16 41

Sources of Information 41
Question 17 42
Communication Preferences 43
Question 18 44
Background & Demographics 46
Methodology 47
Questionnaire Development 47
Programming, Pre-Test & Translation 47
Sample, Recruiting & Data Collection 47
Margin of Error due to Sampling 48
Data Processing & Weighting 48
Rounding 49
Questionnaire & Toplines 50

List of Tables

Table 1 Rating City of San Mateo by Study Year . . . 11
Table 2 Rating City of San Mateo by Years in San Mateo & Gender (Showing % Excellent & Good) . . . 11
Table 3 Rating City of San Mateo by Age (Showing % Excellent & Good) . . . 11
Table 4 Rating City of San Mateo by Child in Hsld & Adult Over 65 in Hsld (Showing % Excellent & Good) . . . 11
Table 5 Rating City of San Mateo by Ethnicity & Home Ownership Status (Showing % Excellent & Good) . . . 11
Table 6 Like Most About San Mateo by Study Year . . . 13
Table 7 Changes to Improve City by Study Year . . . 14
Table 8 Satisfaction With City Services by Study Year . . . 18
Table 9 Satisfaction With City Services by Overall Satisfaction With City . . . 19
Table 10 Amount of Affordable Housing in San Mateo by Years in San Mateo, Adult Over 65 in Hsld & Survey Language (Showing % Too Little) . . . 21
Table 11 Amount of Affordable Housing in San Mateo by Age (Showing % Too Little) . . . 21
Table 12 Amount of Affordable Housing in San Mateo by Gender, Child in Hsld & Home Ownership Status (Showing % Too Little) . . . 21
Table 13 Importance of Issues of City Development by Years in San Mateo & Overall Satisfaction (Showing % Extremely Important) . . . 23
Table 14 Importance of Issues of City Development by Age (Showing % Extremely Important) . . . 24
Table 15 Importance of Issues of City Development by Child in Hsld, Adult Over 65 in Hsld & Survey Language (Showing % Extremely Important) . . . 25
Table 16 Importance of Issues of City Development by Ethnicity & Home Ownership Status (Showing % Extremely Important) . . . 26
Table 17 Strategies to Reduce Traffic by Years in San Mateo & Gender (Showing % High Priority) . . . 32
Table 18 Strategies to Reduce Traffic by Age (Showing % High Priority) . . . 32
Table 19 Strategies to Reduce Traffic by Child in Hsld, Adult Over 65 in Hsld & Survey Language (Showing % High Priority) . . . 33
Table 20 Strategies to Reduce Traffic by Ethnicity & Home Ownership Status (Showing % High Priority) . . . 33
Table 21 Effectiveness of Communication Methods by Study Year . . . 44
Table 22 Effectiveness of Communication Methods by Age (Showing % Very Effective) . . . 44
Table 23 Effectiveness of Communication Methods by Ethnicity & Overall Satisfaction (Showing % Very Effective) . . . 45
Table 24 Effectiveness of Communication Methods by Child in Hsld, Satisfaction With Communication & Survey Language (Showing % Very Effective)45
Table 25 Demographics of Sample by Study Year . . . 46

List of Figures

Figure 1 Rating City of San Mateo . . . 10
Figure 2 Like Most About San Mateo . . . 12
Figure 3 Changes to Improve City . . . 13
Figure 4 Overall Satisfaction by Study Year . . . 15
Figure 5 Overall Satisfaction by Years in San Mateo, Child in Hsld & Survey Language . . . 16
Figure 6 Overall Satisfaction by Age & Gender . . . 16
Figure 7 Overall Satisfaction by Ethnicity, Home Ownership Status & Adult Over 65 in Hsld . . . 16
Figure 8 Satisfaction With City Services . . . 17
Figure 9 Amount of Affordable Housing in San Mateo by Study Year . . . 20
Figure 10 Importance of Issues of City Development . . . 22
Figure 11 Support Concentrating Future Housing in Higher Density Buildings . . . 27
Figure 12 Support Concentrating Future Housing in Higher Density Buildings up to 8 stories by Years in San Mateo & Age . . . 27
Figure 13 Support Concentrating Future Housing in Higher Density Buildings up to 8 Stories by Child in Hsld, Anticipated Years in San Mateo & Adult Over 65 in Hsld . . . 28
Figure 14 Support Concentrating Future Housing in Higher Density Buildings up to 8 Stories by Ethnicity, Home Ownership Status & Survey Language . . . 28
Figure 15 Frequency of Mode Use Within City . . . 29
Figure 16 Frequency of Mode Use Within City by Overall, Age & Overall Satisfaction . . . 30
Figure 17 Frequency of Mode Use Within City by Employment Status & Ethnicity . . . 30
Figure 18 Strategies to Reduce Traffic . . . 31
Figure 19 Support Adding Bike Lanes, Widening Sidewalks in San Mateo . . . 34
Figure 20 Support Adding Bike Lanes, Widening Sidewalks in San Mateo by Years in San Mateo & Age . . . 34
Figure 21 Support Adding Bike Lanes, Widening Sidewalks in San Mateo by Child in Hsld & Anticipated Years in San Mateo . . . 35
Figure 22 Support Adding Bike Lanes, Widening Sidewalks in San Mateo by Ethnicity, Home Ownership Status & Survey Language . . . 35
Figure 23 Support Adding Bike Lanes, Widening Sidewalks in San Mateo by Employment Status & Work Commute Status . . . 35
Figure 24 Support Adding Bike Lanes, Widening Sidewalks in San Mateo by Traveling Within City at Least 1x Per Week & Adult Over 65 In Hsld . . . 36
Figure 25 Satisfaction With Communication by Study Year . . . 37
Figure 26 Satisfaction With Communication by Years in San Mateo, Child in Hsld & Adult Over 65 in Hsld . . . 38
Figure 27 Satisfaction With Communication by Age & Gender . . . 38
Figure 28 Satisfaction With Communication by Ethnicity, Overall Satisfaction, Home Ownership Status & Survey Language . . . 38
Figure 29 Interested in Receiving More Information About City . . . 39
Figure 30 Interested in Receiving More Information About City by Years in San Mateo, Child in Hsld & Adult Over 65 in Hsld . . . 39
Figure 31 Interested in Receiving More Information About City by Age & Gender . . . 40
Figure 32 Interested in Receiving More Information About City by Ethnicity, Overall Satisfaction, Home Ownership Status & Survey Language . . . 40
Figure 33 Information Topics Desired . . . 41
Figure 34 Information Sources by Study Year . . . 42
Figure 35 Information Sources by Study Year by Overall, Age & Satisfaction With Communication . . . 42
Figure 36 Information Sources by Study Year by Ethnicity, Child in Hsld & Adult Over 65 in Hsld . . . 43

Figure 37 Information Sources by Study Year by Years in San Mateo, Overall Satisfaction & Survey Language 43
Figure 38 Effectiveness of Communication Methods 44
Figure 39 Maximum Margin of Error 48

INTRODUCTION

Incorporated in 1894, the City of San Mateo encompasses 15.9 square miles in the San Francisco Bay Area and is currently home to an estimated 105,661 residents.[1] One of only two charter cities in San Mateo County, the City is governed by a five-member City Council, while the City's daily operations are managed by a dedicated team of employees that provide a full suite of services to residents and the local business community.

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, opinions, 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 for 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 mobility and how best to plan for 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 survey. Broadly defined, the survey was designed to:

- Identify key issues of importance for residents, as well as their perceptions of the quality of life in San Mateo;

1. US Census estimate, April 2020.

- 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 mobility and housing;
- 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 47). In brief, the survey was administered to a random sample of 775 adults who reside in the City of San Mateo. The survey followed a mixed-method design that employed multiple recruiting methods (mailed letters, email, text, and telephone) and multiple data collection methods (telephone and online). Administered in English and Spanish between January 21 and February 2, 2022, the average interview lasted 18 minutes.

STATISTICAL SIGNIFICANCE This is not the first statistically reliable community survey conducted for the City of San Mateo. A similar study was conducted by True North for the City in 2020, and many of the questions included in the 2022 survey were purposely tracked from the prior survey. Because there is a natural interest in tracking the City's performance in meeting the evolving needs of its residents, where appropriate the results of the current study are compared with the results of identical questions included in the 2020 survey. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in public opinion between the prior survey (2020) and the current (2022), as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion between the two studies. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2022.

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 50), 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 1,200 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 the most positive ratings for the overall quality of life in the City (85% excellent or good), San Mateo as a place to shop and dine (77%), and as a place to raise a family (68%).
- Although still rated favorably by over half of respondents, residents provided somewhat softer ratings for San Mateo as a place to work (62%) and as a place to recreate (59%).
- Just over one-third of residents provided a favorable rating for San Mateo as a place to retire (37%), although approximately 13% 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 (24%), followed by shopping and dining opportunities (16%), proximity to surrounding cities/areas (12%), and the open/green spaces and mountains (12%). Other specific attributes that were mentioned by at least 5% of respondents included San Mateo's diversity of business, cultures, and activities (9%), small town atmosphere (8%), low crime rate/public safety (7%), downtown area (7%), and friendly people/neighbors (6%).
- 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 (19%), followed by limiting growth and preserving open space (13%), improving public safety/more police presence (8%), and improving and maintaining infrastructure, streets and roads (7%).

CITY SERVICES

- Close to three-quarters (74%) of San Mateo residents indicated they were either very (25%) or somewhat (49%) satisfied with the City's efforts to provide municipal services. Approximately 16% were very or somewhat dissatisfied, whereas 10% were unsure or unwilling to share their opinion.
- Residents were asked to rate their satisfaction with 18 specific services provided by the City of San Mateo. Although the majority of residents surveyed were satisfied with 13 of the 16 services tested, they were most satisfied with the City's efforts to provide fire protection, prevention, and emergency medical services (94% very or somewhat satisfied), followed by maintain public buildings and facilities like City Hall, libraries, and parking garages (91%), provide parks, sports fields, and recreation facilities (87%), provide paths and trails for walking, jogging, and running (82%), and provide a variety of recreation programs for all ages (81%).
- At the other end of the spectrum, respondents were less satisfied with the City's efforts to facilitate the creation of affordable housing (33%), address homelessness (42%), manage traffic congestion (48%), and maintain local streets and roads (54%).

HOUSING & LAND USE

- Approximately two-thirds of residents indicated that there is currently too little housing that is affordable for middle-income (67%) and low-income families (64%) in the City of San Mateo.
- When asked to prioritize among a list of factors the City could consider as it plans for additional housing units as required by state law, ensuring adequate water supplies (98% at least somewhat important) was viewed as the most important factor, followed by preserving open space and creating new park lands (97%), minimizing vehicle trips and traffic congestion (95%), creating pedestrian-friendly areas that encourage people to walk rather than drive (94%), and minimizing pollution and greenhouse gas emissions (93%).
- When compared to the other items tested, respondents indicated that keeping building heights low (68%) and minimizing the number of new units added to single-family neighborhoods (68%) were the least important when planning for future housing in the City.
- When presented with the opportunity to reserve more land for parks, recreation areas, and community amenities *and* minimize change to existing neighborhoods, 63% of San Mateo residents indicated they would support concentrating new housing in higher-density buildings downtown and near transit up to 12 stories. A higher percentage (68%) indicated they would support buildings up to eight stories.

MOBILITY

- The vast majority of residents (87%) indicated they use a personal vehicle on a weekly basis when traveling within the City of San Mateo, while 45% reported that they walk from their home to a local store or restaurant at least once per week. Less than one-in-five respondents indicated that they ride a bicycle or scooter (19%), use public transit such as a bus or train (8%), or use Uber, Lyft, or a taxi (4%) at least once per week when traveling within the City of San Mateo.
- Among strategies the City could consider to reduce vehicle trips and mitigate growth-induced congestion in the future, improving safe routes to school to encourage more kids to walk and bike to school (84% high or medium priority) and improving sidewalks, crosswalks, pedestrian safety, signs and infrastructure to encourage more walking (84%) were widely viewed as the top priorities, followed by improving bus and shuttle services with more routes and more frequent service within San Mateo and to neighboring areas (71%), providing financial incentives to encourage greater use of transit use (64%), and expanding the network of dedicated bike lanes and shared lanes to encourage more bicycling (63%).
- Sixty-four percent (64%) of respondents indicated they generally support adding bike lanes and widening sidewalks in San Mateo, even if it requires removing a vehicle lane or parking spaces in certain locations.

COMMUNICATIONS

- Overall, 62% of respondents indicated they were satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means in 2022. The remaining respondents were either dissatisfied with the City's efforts in this respect (25%) or unsure of their opinion (13%).
- Thirty percent (30%) of respondents indicated the were interested in receiving more information from the City.

- The most commonly mentioned topics of interest were information about the City's future commercial and residential development plans (31%), affordable housing (13%), street/road and infrastructure maintenance (13%), environmental issues (8%), public transportation (7%), public safety/crime statistics (7%), and recreation programs (7%).
- When asked to identify the information sources they *currently* use most often for news, information, and programming in San Mateo, the most frequently cited sources were the San Mateo Daily Journal and email notifications from the City, both mentioned by 30% of respondents. These sources were followed by letters, postcards, flyers, or brochures mailed to the home from the City (24%), Nextdoor (23%), the Internet not including the City's site (18%), the City's website (15%), and friends/family/associates/word of mouth (15%).
- Respondents indicated that email was the most effective method for the City to communicate with them (84% very or somewhat effective), followed by postcards, letters, and newsletters mailed to the home (i.e., direct mail, 78%), social media like Facebook, Twitter, and Nextdoor (78%), and the City's website (72%).
- Townhall meetings (52%), television programs (41%), and advertisements in local papers (40%) 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' satisfaction, opinions, and priorities 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?

The two years leading up to the *2022 Community Opinion Survey* were punctuated by difficult and dramatic events in San Mateo. The coronavirus pandemic that arrived in early 2020 has taken lives, threatened livelihoods, and forced dramatic changes in the way residents live, work, socialize, and play. Non-essential businesses were shuttered for weeks or months at a time to curb the spread of COVID-19, and the City's operations were also adjusted to protect public health and adhere to State and County guidelines. Services that could be effectively moved to an online format were able to continue in that form, whereas other programs and services were modified, curtailed, or canceled to protect the safety of the public and City employees. Many city facilities were also closed periodically to prevent the spread of COVID-19, including City Hall.

Against this turbulent backdrop, residents' opinions of their community and city government remained positive. Approximately three-quarters of residents (74%) indicated they were satisfied with the City's overall efforts to provide municipal services, whereas just 16% were dissatisfied and the remaining 10% were unsure or did not provide a response. The percentage of respondents who indicated they were very satisfied with the City's overall performance also increased significantly between 2020 and 2022, and satisfaction was widespread across resident subgroups (see *Overall Satisfaction* on page 15).

The high level of satisfaction expressed with the City's performance *in general* was also mirrored in residents' assessments of the City's performance in providing specific services, with the highest satisfaction scores assigned to the City's efforts to provide fire protection, prevention, and emergency medical services, maintain public buildings and facilities like City Hall, libraries, and parking garages, provide parks, sports fields, and recreation facilities, provide paths and trails for walking, jogging, and running, and provide a variety of recreation programs for all ages (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 in 2022 (85%) rated the quality of life in the City of San Mateo as excellent or good, a statistically significant increase of 4% when

compared to 2020. This sentiment was also widespread, with the percentage who rated the quality of life as excellent or good exceeding 75% across *every* identified resident subgroup (see *Overall Quality of Life* on page 10). 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 topped the list, followed by shopping and dining opportunities, proximity to surrounding cities/areas, and the open/green spaces and mountains (see *What do You Like Most About Living in San Mateo?* on page 11).

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: facilitating the creation of more affordable housing, limiting growth/preserving open space, addressing homelessness, managing traffic congestion, maintaining local streets and roads, improving public safety, and improving city-resident communication.

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 criteria do residents want the City to prioritize when planning for future housing?

Affordable housing (or lack thereof) has become a hot topic in many communities, increasing in saliency during the past few years along with rising rents and home prices. When asked directly, most respondents felt there was too little affordable housing (of any type) in San Mateo, and increasing the availability of affordable housing was the most frequently mentioned change that residents indicated would make San Mateo a better place to live, now and in the future.

When asked to rate various criteria the City could consider as it explores different ways that it could accommodate future housing, factors related to environmental sustainability tended to rise to the top of the list among survey respondents. Of the 18 factors tested, ensuring adequate water supplies was viewed as the most important factor, followed by preserving open space and creating new park lands, minimizing vehicle trips and traffic congestion, creating pedestrian-friendly areas that encourage people to walk rather than drive, and minimizing pollution and greenhouse gas emissions. When compared to the other factors tested, respondents indicated that keeping building heights low and minimizing the number of new units added to single-family neighborhoods were the *least* important when planning for future housing in the City (see *Factors to Prioritize when Planning Housing* on page 21).

The desire to preserve land for parks and community spaces was also evident in residents' willingness to accept taller, high-density housing up to 12 stories (64%) or eight stories (68%) downtown and near transit if it would reserve more land for parks, recreation areas, and community amenities while also minimizing the impacts of new housing in existing neighborhoods (see *Building Height & Density Trade-offs* on page 26).

What actions do residents prioritize for minimizing vehicle trips and congestion in the future?

One of the key challenges when planning for population growth and future housing is the issue of mobility. Put simply, adding housing and people to a community will naturally lead to more congestion and decreased mobility unless improvements are made to the transportation system to accommodate the additional demand and/or vehicle demand is mitigated through use of alternative modes. Accordingly, the survey explored the types of actions and strategies residents would prioritize for minimizing growth-induced congestion in the future.

Improving safe routes to school to encourage more kids to walk and bike to school (84% high or medium priority) and improving sidewalks, crosswalks, pedestrian safety, signs and infrastructure to encourage more walking (84%) were widely viewed as the top priorities among the actions tested, followed by improving bus and shuttle services with more routes and more frequent service within San Mateo and to neighboring areas (71%), providing financial incentives to encourage greater use of transit use (64%), and expanding the network of dedicated bike lanes and shared lanes to encourage more bicycling (63%). It is worth noting, moreover, that 64% of respondents indicated they generally support adding bike lanes and widening sidewalks in San Mateo, even if it requires removing a vehicle lane or parking spaces in certain locations (see *Mobility* on page 29).

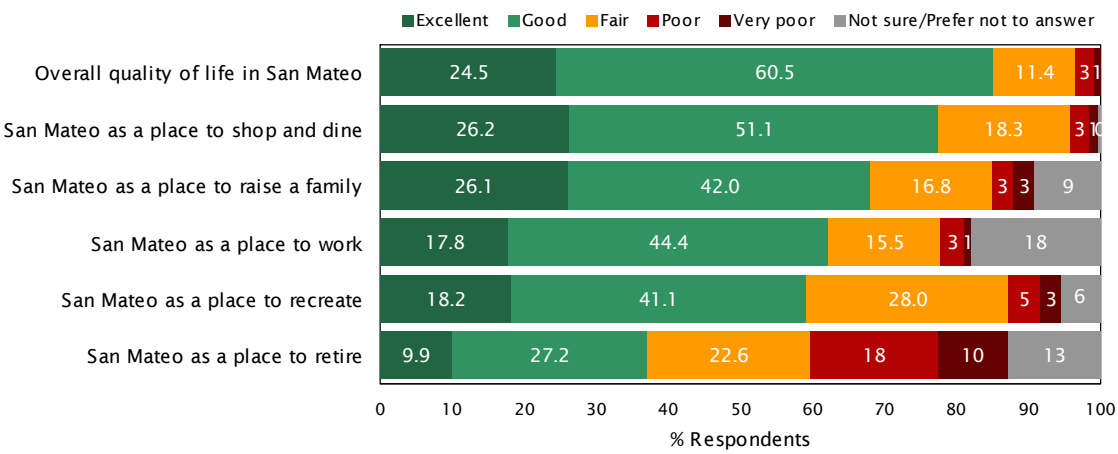
Quality of Life

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 (85% excellent or good), San Mateo as a place to shop and dine (77%), and as a place to raise a family (68%). Although still rated favorably by over half of respondents, residents provided somewhat softer ratings for San Mateo as a place to work (62%) and as a place to recreate (59%). Just over one-third of residents provided a favorable rating for San Mateo as a place to retire (37%), although approximately 13% 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 18% 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



As shown in Table 1 on the next page, when compared to 2020, the percentage of respondents in 2022 who offered ratings of excellent or good increased significantly for San Mateo as a place to retire (+7%), as a place to shop and dine (+6%), as a place to work (+5%), and the overall quality of life in the City (+4%). Tables 2 through 5, meanwhile, show how the ratings for each dimension tested in Question 2 varied by length of residence, gender, age, presence of a child in the home, presence of a senior in the home, ethnicity, and home ownership. For ease of comparison, the top three ratings within each subgroup are highlighted green.

TABLE 1 RATING CITY OF SAN MATEO BY STUDY YEAR

	Study Year 2022	Study Year 2020	Change in Excellent + Good 2020 to 2022
San Mateo as a place to retire	37.0	30.3	+6.7†
San Mateo as a place to shop and dine	77.4	71.6	+5.8†
San Mateo as a place to work	62.2	57.6	+4.6†
Overall quality of life in San Mateo	85.0	80.9	+4.1†
San Mateo as a place to raise a family	68.1	65.1	+3.0
San Mateo as a place to recreate	59.2	56.3	+3.0

† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

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

	Years in San Mateo (Q1)				Gender (QD2)	
	Less than 5	5 to 9	10 to 14	15 or longer	Male	Female
Overall quality of life in San Mateo	88.8	87.0	88.5	82.0	86.4	85.9
San Mateo as a place to shop and dine	83.6	77.2	85.6	73.0	79.0	77.8
San Mateo as a place to raise a family	63.8	64.7	72.9	69.8	69.4	68.9
San Mateo as a place to work	57.0	63.7	56.6	65.2	62.9	64.6
San Mateo as a place to recreate	59.1	56.5	63.3	59.2	57.2	62.3
San Mateo as a place to retire	28.7	36.8	39.6	40.1	35.2	40.6

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

	Age (QD1)					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
Overall quality of life in San Mateo	88.2	83.6	83.4	86.0	86.0	86.0
San Mateo as a place to shop and dine	86.1	81.8	75.5	77.1	77.8	70.8
San Mateo as a place to raise a family	69.4	62.2	71.8	73.5	69.8	67.5
San Mateo as a place to work	75.9	60.9	54.8	65.9	67.9	59.3
San Mateo as a place to recreate	67.0	54.5	60.7	62.1	62.8	55.2
San Mateo as a place to retire	54.5	30.6	28.1	30.7	32.1	51.7

TABLE 4 RATING CITY OF SAN MATEO BY CHILD IN HSLD & ADULT OVER 65 IN HSLD (SHOWING % EXCELLENT & GOOD)

	Child in Hsld (QD3,4)			Adult Over 65 in Hsld (QD5)	
	Yes, under 18	Yes, under 6	None	Yes	No
Overall quality of life in San Mateo	82.0	76.0	88.6	84.5	87.0
San Mateo as a place to shop and dine	77.2	72.8	78.6	74.3	79.8
San Mateo as a place to raise a family	76.6	75.6	66.3	69.2	69.3
San Mateo as a place to work	68.2	65.6	61.2	58.1	65.5
San Mateo as a place to recreate	58.5	56.5	60.4	56.1	61.2
San Mateo as a place to retire	30.5	24.3	40.7	48.4	32.1

TABLE 5 RATING CITY OF SAN MATEO BY ETHNICITY & HOME OWNERSHIP STATUS (SHOWING % EXCELLENT & GOOD)

	Ethnicity (QD12)				Home Ownership Status (QD6)	
	Caucasian / White	Asian American	Latino / Hispanic	Mixed or other	Own	Rent
Overall quality of life in San Mateo	87.5	89.6	80.3	80.7	85.7	86.1
San Mateo as a place to shop and dine	74.8	80.8	80.1	75.5	75.2	80.8
San Mateo as a place to raise a family	67.4	73.3	67.4	66.1	73.4	64.6
San Mateo as a place to work	59.6	65.4	66.3	53.1	61.0	65.1
San Mateo as a place to recreate	59.4	64.9	56.9	51.2	59.4	59.9
San Mateo as a place to retire	33.1	40.2	42.9	29.6	40.0	33.5

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.

San Mateo residents were most apt to cite parks and recreation facilities and opportunities (24%) as what they like most about living in the City of San Mateo and would like to preserve, followed by shopping and dining opportunities (16%), proximity to surrounding cities/areas (12%), and the open/green spaces and mountains (12%). Other specific attributes that were mentioned by at least 5% of respondents included San Mateo's diversity of business, cultures, and activities (9%), small town atmosphere (8%), low crime rate/public safety (7%), downtown area (7%), and friendly people/neighbors (6%). For the interested reader, Table 6 on the next page lists the top five responses to Question 3 in 2020 and 2022.

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

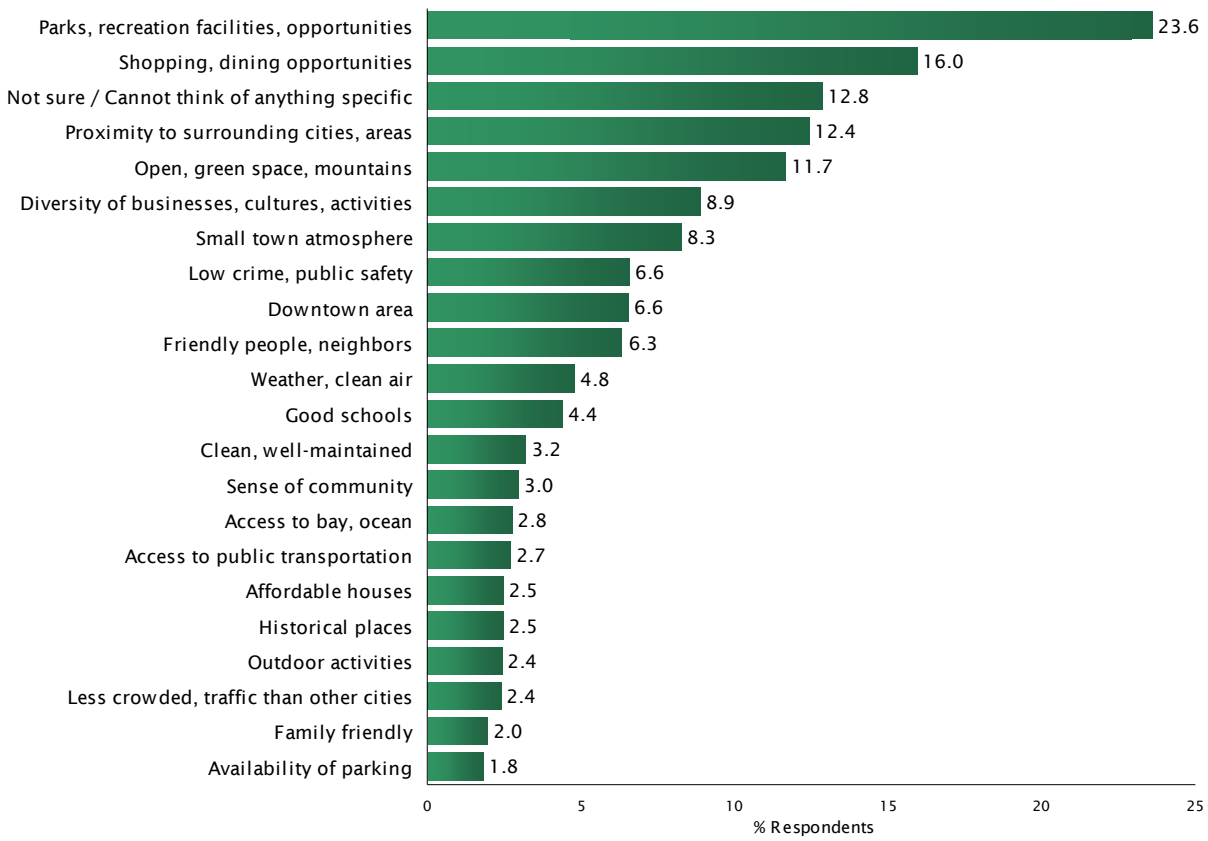


TABLE 6 LIKE MOST ABOUT SAN MATEO BY STUDY YEAR

Study Year	
2022	2020
Parks, recreation facilities, opportunities	Parks, recreation facilities, opportunities
Shopping, dining opportunities	Not sure / Cannot think of anything specific
Not sure / Cannot think of anything specific	Shopping, dining opportunities
Proximity to surrounding cities, areas	Small town atmosphere
Open, green space, mountains	Proximity to surrounding cities, areas

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. Among the specific changes desired, providing more affordable housing was the most common (19%), followed by limiting growth and preserving open space (13%), improving public safety/more police presence (8%), and improving and maintaining infrastructure, streets and roads (7%). Approximately 14% could not think of a desired change (10%) or reported that no changes are needed (4%). Table 7 shows the top 5 responses to Question 4 in 2020 and 2022.

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

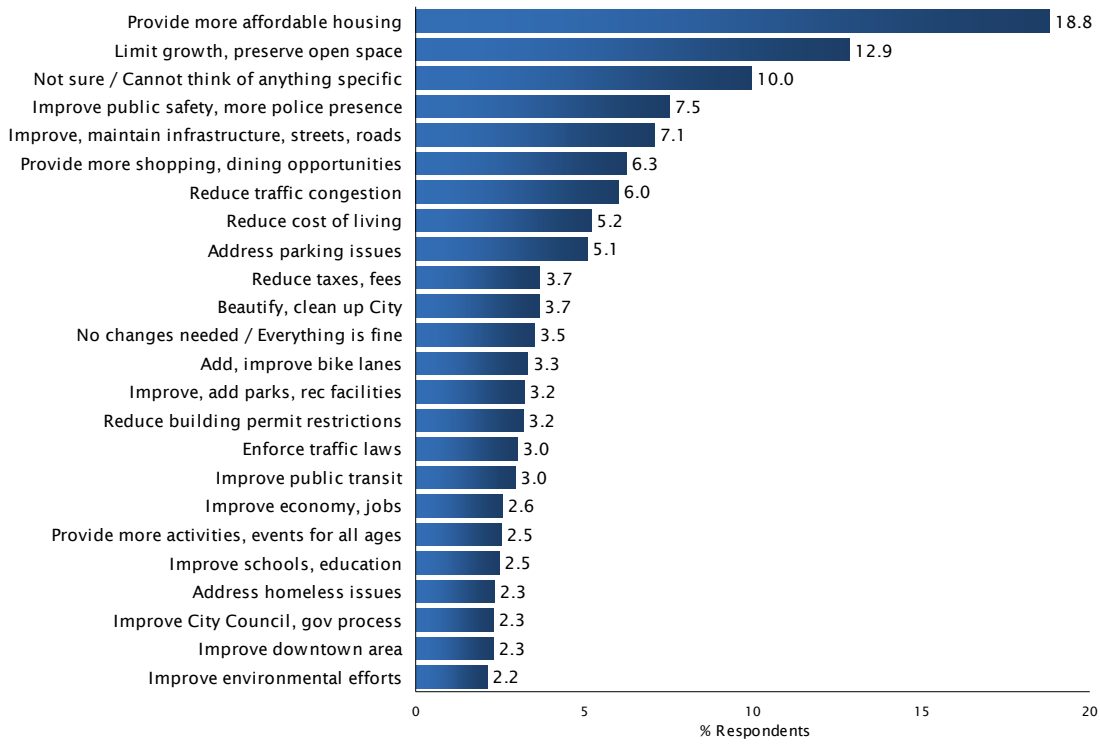


TABLE 7 CHANGES TO IMPROVE CITY BY STUDY YEAR

Study Year	
2022	2020
Provide more affordable housing	Provide more affordable housing
Limit growth, preserve open space	Reduce traffic congestion
Not sure / Cannot think of anything specific	Limit growth, preserve open space
Improve public safety, more police presence	Improve, maintain infrastructure, streets, roads
Improve, maintain infrastructure, streets, roads	Improve parking

City Services

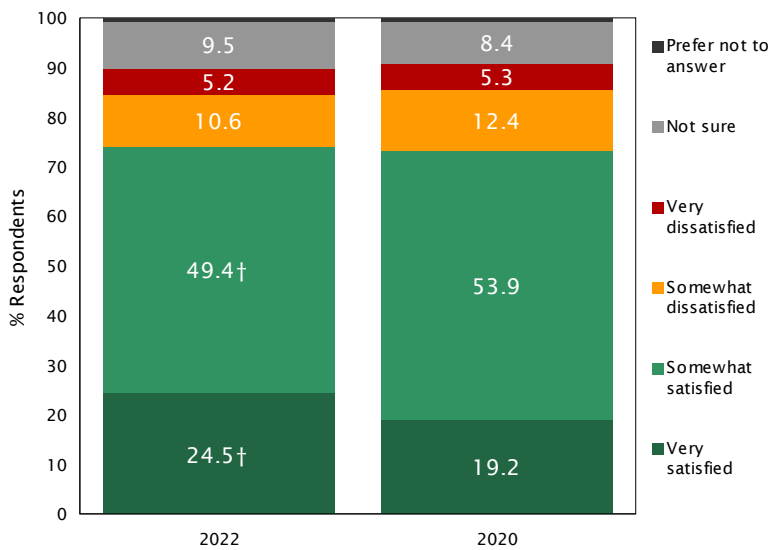
After measuring respondents' perceptions of the quality of life in San Mateo, the survey next turned to assessing their opinions about the City's performance in providing various municipal services.

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 (74%) of San Mateo residents indicated they were either very (25%) or somewhat (49%) satisfied with the City's efforts to provide municipal services. Approximately 16% were very or somewhat dissatisfied, whereas 10% were unsure or unwilling to share their opinion. When compared to 2020, its worth noting that the percentage of respondents indicating they were *very* satisfied with the City's performance increased significantly.

Question 5 *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 BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

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, survey language, age of the respondent, gender, ethnicity, home ownership status, 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 62% to a high of 90%.

FIGURE 5 OVERALL SATISFACTION BY YEARS IN SAN MATEO, CHILD IN HSLD & SURVEY LANGUAGE

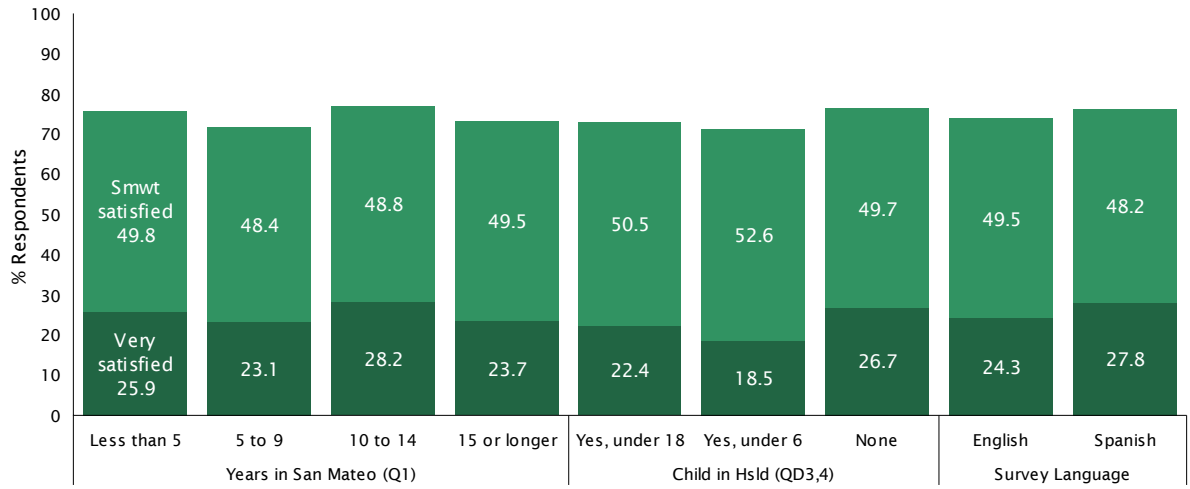


FIGURE 6 OVERALL SATISFACTION BY AGE & GENDER

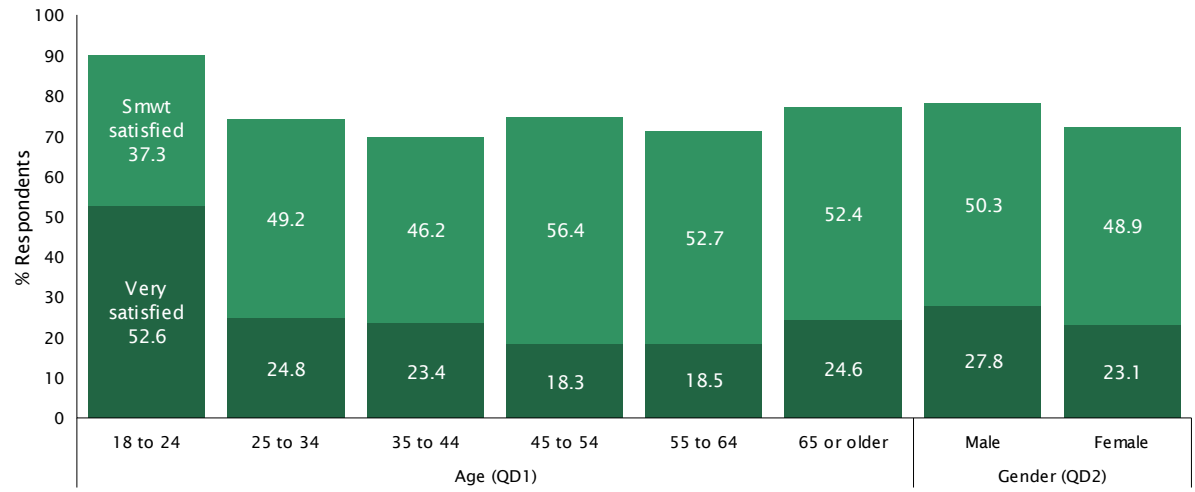
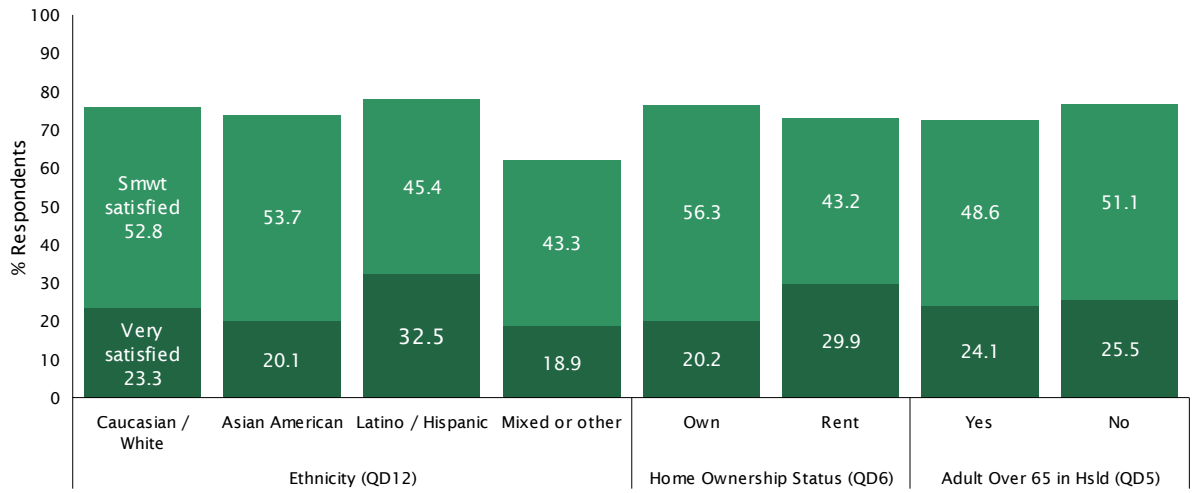


FIGURE 7 OVERALL SATISFACTION BY ETHNICITY, HOME OWNERSHIP STATUS & ADULT OVER 65 IN HSLD

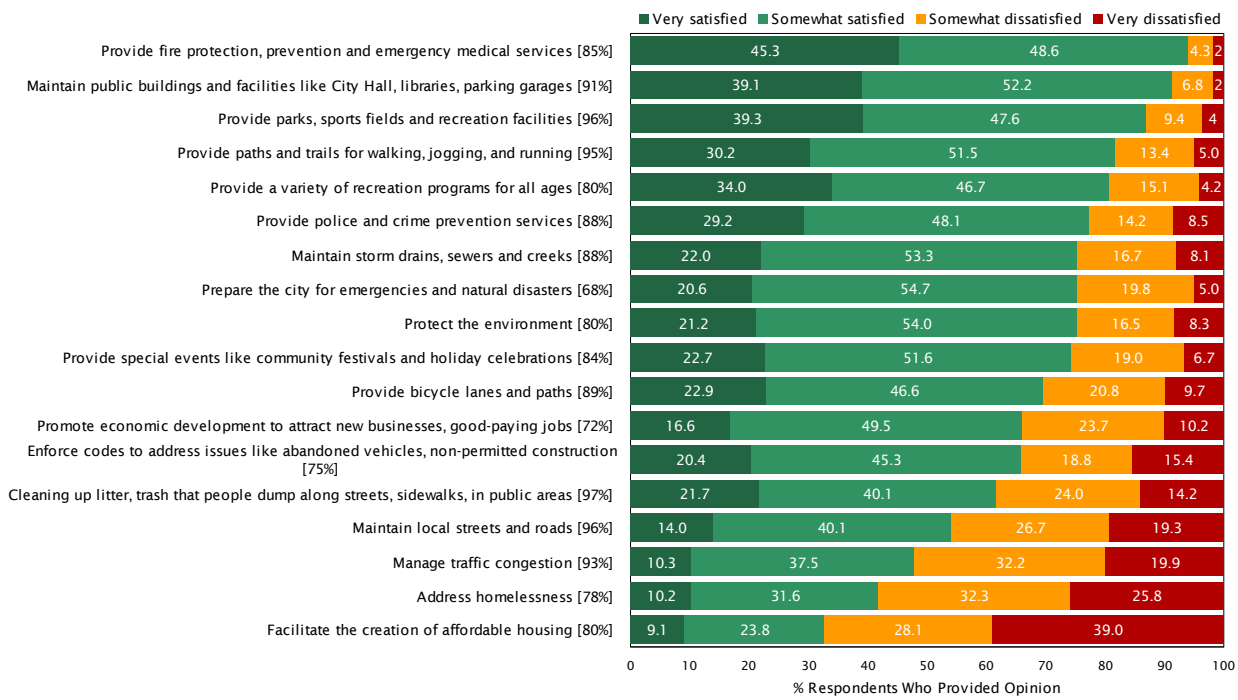


SPECIFIC SERVICES Whereas Question 5 addressed the City's *overall* performance, Question 6 asked residents to rate their level of satisfaction with each of the 18 specific service areas shown in Figure 8. The order in which the service areas were presented was randomized for each respondent to avoid 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 (94% very or somewhat satisfied), followed by maintain public buildings and facilities like City Hall, libraries, and parking garages (91%), provide parks, sports fields, and recreation facilities (87%), provide paths and trails for walking, jogging, and running (82%), and provide a variety of recreation programs for all ages (81%). At the other end of the spectrum, respondents were less satisfied with the City's efforts to facilitate the creation of affordable housing (33%), address homelessness (42%), manage traffic congestion (48%), 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.

Table 8 displays the percentage of respondents who were satisfied with each service by study year, and the difference between 2020 and 2022. When compared with the 2020 survey, satisfaction with the City's efforts to manage traffic congestion increasing significantly (+18%), while satisfaction with the City's efforts to provide a variety of recreation programs for all ages (-4%), police and crime prevention services (-5%), special events like community festivals and holiday celebrations (-8%), and address homelessness (-9%) decreased significantly.

TABLE 8 SATISFACTION WITH CITY SERVICES BY STUDY YEAR

	Study Year		Change in Satisfaction 2020 to 2022
	2022	2020	
Manage traffic congestion	47.9	30.3	+17.6†
Enforce codes to address issues like abandoned vehicles, non-permitted construction	65.8	62.0	+3.7
Prepare the city for emergencies and natural disasters	75.3	73.8	+1.4
Promote economic development to attract new businesses, good-paying jobs to community	66.1	65.5	+0.6
Maintain storm drains, sewers and creeks	75.3	75.1	+0.2
Maintain public buildings and facilities like City Hall, libraries, parking garages	91.3	91.5	-0.1
Maintain local streets and roads	54.0	54.3	-0.3
Provide parks, sports fields and recreation facilities	86.9	88.6	-1.7
Provide fire protection, prevention and emergency medical services	93.9	95.9	-1.9
Provide a variety of recreation programs for all ages	80.7	84.6	-3.9†
Provide police and crime prevention services	77.3	82.7	-5.3†
Provide special events like community festivals and holiday celebrations	74.2	82.5	-8.3†
Address homelessness	41.8	51.0	-9.1†
Protect the environment	75.2	N/A	N/A
Provide paths and trails for walking, jogging, and running	81.6	N/A	N/A
Provide bicycle lanes and paths	69.5	N/A	N/A
Cleaning up litter, trash that people dump along streets, sidewalks, in public areas	61.8	N/A	N/A
Facilitate the creation of affordable housing	32.9	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

DIFFERENTIATORS OF OPINION For the interested reader, Table 9 on the next page 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 maintain local streets and roads, promote economic development to attract new businesses and good-paying jobs to the community, maintain storm drains, sewers and creeks, provide police and crime prevention services, and enforce code violations to address issues like abandoned vehicles, non-permitted construction, and yards not being properly maintained.

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, and provide paths and trails for walking, jogging, and running.

TABLE 9 SATISFACTION WITH CITY SERVICES BY OVERALL SATISFACTION WITH CITY

		City's Overall Performance (Q5)		Difference Between Groups For Each Service
		Very or somewhat satisfied	Very or somewhat dissatisfied	
% Respondents Satisfied With Each Service	Maintain local streets and roads	61.0	20.7	40.3
	Promote economic development to attract new businesses, good-paying jobs	74.7	35.3	39.4
	Maintain storm drains, sewers and creeks	81.9	47.9	34.0
	Provide police and crime prevention services	83.8	50.6	33.1
	Enforce codes to address issues like abandoned vehicles, non-permitted construction	71.9	39.3	32.6
	Cleaning up litter, trash that people dump along streets, sidewalks, in public areas	67.9	36.3	31.7
	Manage traffic congestion	53.9	22.5	31.4
	Provide a variety of recreation programs for all ages	87.3	56.1	31.2
	Provide special events like community festivals and holiday celebrations	81.9	50.8	31.0
	Protect the environment	81.3	50.5	30.8
	Prepare the city for emergencies and natural disasters	81.8	51.0	30.8
	Address homelessness	47.8	20.7	27.1
	Maintain public buildings, facilities like City Hall, libraries, parking garages	95.0	71.6	23.4
	Provide parks, sports fields and recreation facilities	90.1	71.5	18.6
	Provide bicycle lanes and paths	74.3	56.3	18.0
	Facilitate the creation of affordable housing	37.0	21.0	16.0
	Provide paths and trails for walking, jogging, and running	84.8	69.6	15.1
	Provide fire protection, prevention and emergency medical services	96.7	82.2	14.5

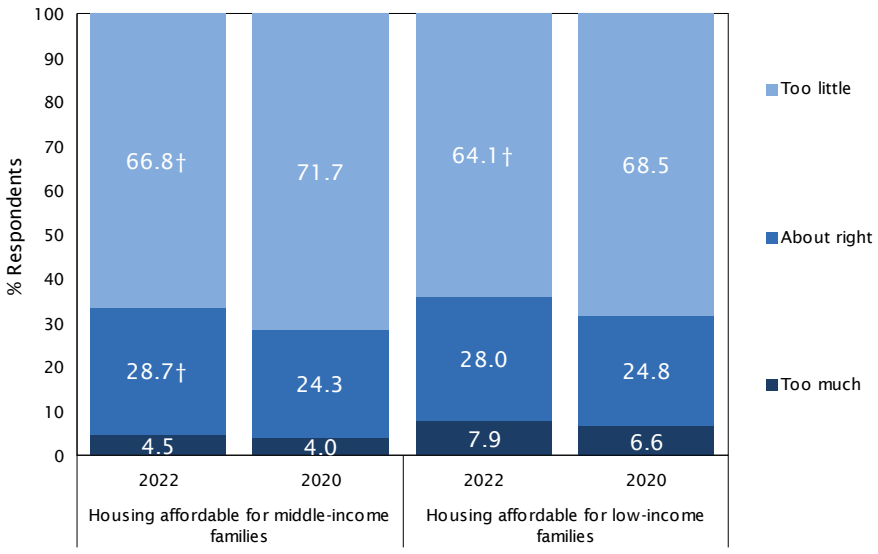
HOUSING & LAND USE

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 and density, as well as the factors that residents feel the City should prioritize when planning new 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 two-thirds of residents indicating that there is currently too little housing that is affordable for middle-income (67%) and low-income families (64%). Approximately three-in-ten residents felt the amount of affordable housing was about right or were unsure (middle income: 29%, low income: 28%), while just 5% felt there was too much housing that is affordable for middle-income families and 8% shared the same sentiment for housing that is affordable for low-income families.

Question 7 *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 BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

Tables 10-12 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. When compared to their respective counterparts, younger residents (under 35), renters, and those who had lived in the City between 10 and 14 years were the most likely to perceive there is not enough affordable housing for low-income families in San Mateo, while those who completed the survey in Spanish, renters, those between 35 and 44 years of age, and those who had lived in the City between 10

and 14 years were the most likely to indicate there is not enough affordable housing for middle-income families.

TABLE 10 AMOUNT OF AFFORDABLE HOUSING IN SAN MATEO BY YEARS IN SAN MATEO, ADULT OVER 65 IN HSLD & SURVEY LANGUAGE (SHOWING % TOO LITTLE)

	Years in San Mateo (Q1)				Adult Over 65 in Hsld (QD5)		Survey Language	
	Less than 5	5 to 9	10 to 14	15 or longer	Yes	No	English	Spanish
Housing affordable for middle-income families	68.3	65.1	72.9	64.7	63.5	68.7	65.8	75.8
Housing affordable for low-income families	67.3	61.5	72.0	60.7	62.1	65.1	63.5	64.8

TABLE 11 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
Housing affordable for middle-income families	60.6	71.5	75.3	63.9	63.5	62.4
Housing affordable for low-income families	87.5	72.8	58.3	58.9	53.4	60.3

TABLE 12 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
Housing affordable for middle-income families	66.6	67.7	67.7	65.5	66.3	59.3	75.1
Housing affordable for low-income families	63.0	65.9	57.6	50.3	67.2	51.0	78.1

FACTORS TO PRIORITIZE WHEN PLANNING HOUSING

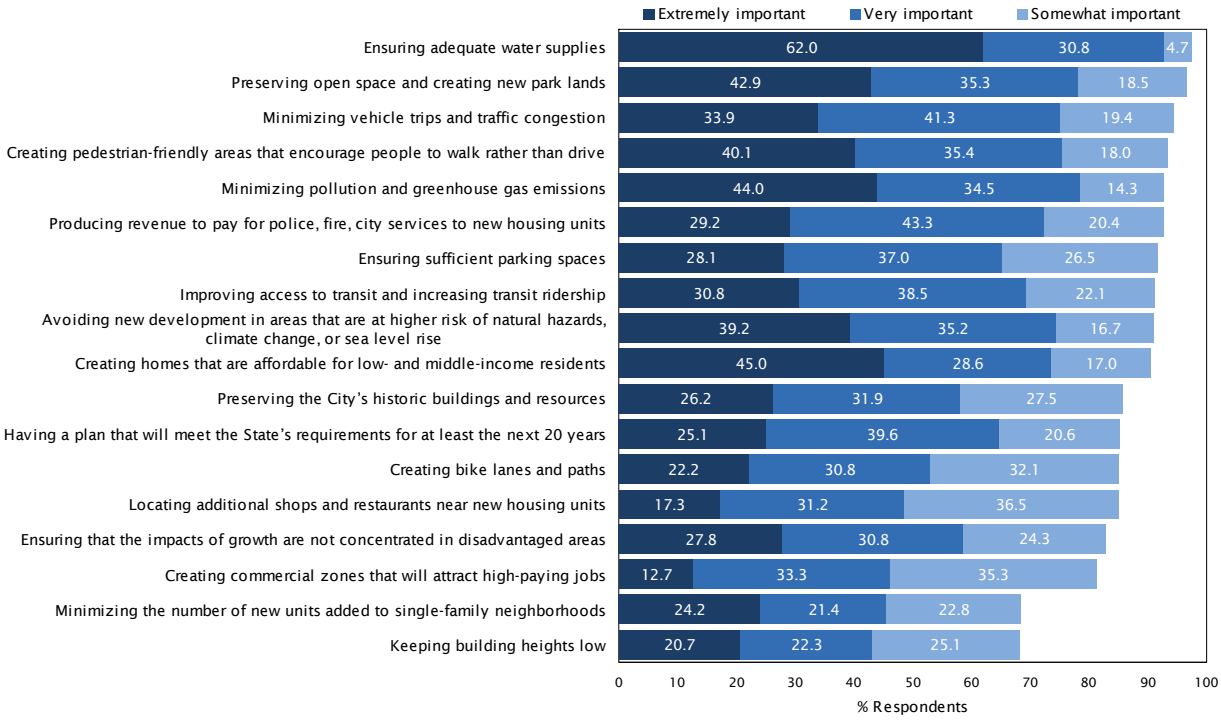
California State law requires that all cities plan for additional housing. With a general shortage of housing in California, the state is requiring that the City of San Mateo plan for thousands of new housing units. After providing this background information, Question 8 presented respondents with each of the factors shown in Figure 10 on the next page and asked them how important they feel the item should be as the City plans for future housing over the next 20 years. To ensure that respondents prioritized among the items, they were instructed to keep in mind that not all of the items can be extremely important.

Although all of the factors tested in Question 8 were viewed as important by at least two-thirds of respondents, factors that relate to environmental sustainability tended to rise to the top of the list when it comes to planning future housing. Overall, ensuring adequate water supplies (98% at least somewhat important) was viewed as the most important factor, followed by preserving open space and creating new park lands (97%), minimizing vehicle trips and traffic congestion (95%), creating pedestrian-friendly areas that encourage people to walk rather than drive (94%), and minimizing pollution and greenhouse gas emissions (93%).

When compared to the other items tested, respondents indicated that keeping building heights low (68%) and minimizing the number of new units added to single-family neighborhoods (68%) were the least important when planning for future housing in the City.

Question 8 *California State law requires that all cities plan for additional housing. With a general shortage of housing in California, the state is requiring that the City of San Mateo plan for thousands of new housing units. There are a variety of factors the City can consider when deciding where new housing may be located and the types of housing that may be built. As I read the following list of items, I'd like to know how important you feel the item should be as the City plans for future housing over the next 20 years. Please keep in mind that not all of the items can be extremely important.*

FIGURE 10 IMPORTANCE OF ISSUES OF CITY DEVELOPMENT



Tables 13-16 show the percentage of respondents in each respondent subgroup that identified a factor as *extremely* important when the City plans for future housing. For the reader's convenience, the top five factors in each subgroup are highlighted in green. When considering just those who indicated a factor was *extremely* important, three factors were consistently among the top five across subgroups: ensuring adequate water supplies, creating homes that are affordable for low- and middle-income residents, and minimizing pollution and greenhouse gas emissions.

TABLE 13 IMPORTANCE OF ISSUES OF CITY DEVELOPMENT BY YEARS IN SAN MATEO & OVERALL SATISFACTION (SHOWING % EXTREMELY IMPORTANT)

	Years in San Mateo (Q1)				Overall Satisfaction (Q5)	
	Less than 5	5 to 9	10 to 14	15 or longer	Satisfied	Dissatisfied
Ensuring adequate water supplies	55.1	62.0	69.2	63.6	62.8	64.1
Creating homes that are affordable for low- and middle-income residents	54.5	46.7	44.8	40.4	45.0	42.1
Minimizing pollution and greenhouse gas emissions	49.9	47.5	43.5	40.6	43.6	40.9
Preserving open space and creating new park lands	41.4	42.9	47.7	42.6	42.0	40.6
Creating pedestrian-friendly areas that encourage people to walk rather than drive	46.1	43.1	39.9	36.7	42.3	28.5
Avoiding new development in areas that are at higher risk of natural hazards, climate change, or sea level rise	42.8	33.7	32.3	40.6	39.0	39.0
Minimizing vehicle trips and traffic congestion	31.0	28.4	26.3	38.3	34.3	35.5
Improving access to transit and increasing transit ridership	37.6	26.8	29.6	29.2	32.4	25.7
Producing revenue necessary to pay for cost of providing police, fire, other city services to new housing units	20.6	28.7	35.7	31.7	29.2	33.4
Ensuring sufficient parking spaces	17.8	25.9	30.4	32.7	26.4	39.5
Ensuring that the impacts of growth are not concentrated in disadvantaged areas	30.4	25.7	23.6	28.1	27.0	31.6
Preserving the City's historic buildings and resources	17.4	18.3	21.8	33.3	27.0	26.5
Having a plan that will meet the State's requirements for at least the next 20 years	26.4	27.0	25.0	24.1	25.6	20.7
Minimizing the number of new units added to single-family neighborhoods	10.8	16.9	19.2	33.2	23.0	37.5
Creating bike lanes and paths	28.5	23.3	15.8	20.5	22.3	18.1
Keeping building heights low	14.6	12.9	19.6	25.9	18.3	35.3
Locating additional shops and restaurants near new housing units	13.9	20.0	17.0	18.0	17.1	16.3
Creating commercial zones that will attract high-paying jobs	11.5	12.3	15.6	12.8	13.3	13.7

TABLE 14 IMPORTANCE OF ISSUES OF CITY DEVELOPMENT BY AGE (SHOWING % EXTREMELY IMPORTANT)

	Age (QD1)					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or older
Ensuring adequate water supplies	46.0	58.1	63.3	67.2	64.5	68.6
Creating homes that are affordable for low- and middle-income residents	50.2	58.3	42.8	40.4	36.9	42.4
Minimizing pollution and greenhouse gas emissions	49.0	46.3	40.3	42.8	39.8	50.9
Preserving open space and creating new park lands	27.8	39.4	47.8	48.1	48.2	40.0
Creating pedestrian-friendly areas that encourage people to walk rather than drive	36.1	49.3	34.9	44.1	42.5	30.7
Avoiding new development in areas that are at higher risk of natural hazards, climate change, or sea level rise	41.5	40.9	31.6	35.7	35.5	46.1
Minimizing vehicle trips and traffic congestion	26.9	28.0	36.1	35.7	40.9	35.1
Improving access to transit and increasing transit ridership	26.4	37.5	30.8	30.5	29.6	23.6
Producing revenue necessary to pay for cost of providing police, fire, other city services to new housing units	21.0	19.9	30.2	35.2	33.0	36.8
Ensuring sufficient parking spaces	13.9	17.3	27.8	29.2	34.4	40.6
Ensuring that the impacts of growth are not concentrated in disadvantaged areas	41.7	32.3	28.4	25.7	20.9	22.6
Preserving the City's historic buildings and resources	21.7	19.6	19.1	27.5	37.9	32.8
Having a plan that will meet the State's requirements for at least the next 20 years	27.1	22.4	22.7	30.7	20.7	30.3
Minimizing the number of new units added to single-family neighborhoods	16.0	12.3	22.7	28.2	34.0	31.5
Creating bike lanes and paths	13.9	21.8	21.4	32.0	24.2	17.2
Keeping building heights low	7.1	11.3	17.5	24.1	28.3	28.9
Locating additional shops and restaurants near new housing units	7.8	16.0	18.1	20.8	15.2	22.2
Creating commercial zones that will attract high-paying jobs	4.7	11.8	17.0	16.1	8.3	15.1

TABLE 15 IMPORTANCE OF ISSUES OF CITY DEVELOPMENT BY CHILD IN HSLD, ADULT OVER 65 IN HSLD & SURVEY LANGUAGE (SHOWING % EXTREMELY IMPORTANT)

	Child in Hsld (QD3,4)			Adult Over 65 in Hsld (QD5)		Survey Language	
	Yes, under 18	Yes, under 6	None	Yes	No	English	Spanish
Ensuring adequate water supplies	69.4	67.5	58.8	64.9	60.8	61.5	69.1
Creating homes that are affordable for low- and middle-income residents	43.2	39.6	46.9	39.6	48.8	42.9	74.8
Minimizing pollution and greenhouse gas emissions	44.4	39.1	44.6	43.8	45.0	43.0	57.2
Preserving open space and creating new park lands	46.9	44.4	41.5	39.4	43.9	42.9	42.5
Creating pedestrian-friendly areas that encourage people to walk rather than drive	39.1	39.0	40.6	31.9	43.4	39.4	49.6
Avoiding new development in areas that are at higher risk of natural hazards, climate change, or sea level rise	38.2	34.8	40.3	46.1	37.1	38.5	48.7
Minimizing vehicle trips and traffic congestion	32.2	27.1	33.5	35.5	32.4	33.2	43.6
Improving access to transit and increasing transit ridership	26.5	26.0	32.5	26.4	33.1	29.6	46.8
Producing revenue necessary to pay for cost of providing police, fire, other city services to new housing units	34.2	33.1	26.3	34.1	26.3	29.2	28.4
Ensuring sufficient parking spaces	29.4	25.1	27.0	39.2	22.8	28.2	27.0
Ensuring that the impacts of growth are not concentrated in disadvantaged areas	28.8	28.7	27.6	25.9	28.5	27.5	31.2
Preserving the City's historic buildings and resources	25.3	21.0	26.4	30.8	23.5	25.9	31.2
Having a plan that will meet the State's requirements for at least the next 20 years	23.4	19.6	26.1	25.4	25.1	24.3	36.4
Minimizing the number of new units added to single-family neighborhoods	28.9	25.7	21.0	29.6	21.0	24.4	21.1
Creating bike lanes and paths	24.1	19.6	21.2	18.4	23.7	22.0	25.3
Keeping building heights low	24.2	22.3	18.4	27.8	16.2	20.4	24.6
Locating additional shops and restaurants near new housing units	20.9	18.9	16.4	17.0	18.2	16.4	29.8
Creating commercial zones that will attract high-paying jobs	15.2	13.5	11.5	14.3	12.1	11.9	24.8

TABLE 16 IMPORTANCE OF ISSUES OF CITY DEVELOPMENT BY ETHNICITY & HOME OWNERSHIP STATUS (SHOWING % EXTREMELY IMPORTANT)

	Ethnicity (QD12)				Home Ownership Status (QD6)	
	Caucasian / White	Asian American	Latino / Hispanic	Mixed or other	Own	Rent
Ensuring adequate water supplies	61.2	63.1	58.3	69.6	65.3	59.0
Creating homes that are affordable for low- and middle-income residents	45.3	35.4	53.7	46.8	27.7	64.4
Minimizing pollution and greenhouse gas emissions	44.6	40.0	44.9	49.3	43.6	44.9
Preserving open space and creating new park lands	43.2	44.2	40.2	37.5	49.9	36.4
Creating pedestrian-friendly areas that encourage people to walk rather than drive	41.1	40.5	38.3	41.0	40.1	41.0
Avoiding new development in areas that are at higher risk of natural hazards, climate change, or sea level rise	38.7	38.5	40.7	42.2	38.8	40.6
Minimizing vehicle trips and traffic congestion	37.9	29.1	28.4	47.8	35.7	31.7
Improving access to transit and increasing transit ridership	33.5	25.2	28.3	42.1	29.9	32.3
Producing revenue necessary to pay for cost of providing police, fire, other city services to new housing units	27.8	30.4	26.7	30.4	33.4	25.1
Ensuring sufficient parking spaces	28.3	29.9	23.2	34.8	32.8	23.4
Ensuring that the impacts of growth are not concentrated in disadvantaged areas	29.8	18.9	28.8	45.2	22.3	33.1
Preserving the City's historic buildings and resources	25.9	24.5	28.2	27.1	26.6	25.7
Having a plan that will meet the State's requirements for at least the next 20 years	24.6	26.7	24.7	22.6	24.2	25.2
Minimizing the number of new units added to single-family neighborhoods	26.2	22.8	19.0	26.7	32.9	14.8
Creating bike lanes and paths	21.5	18.4	22.1	33.6	21.1	24.1
Keeping building heights low	20.5	20.7	19.0	18.9	28.0	12.8
Locating additional shops and restaurants near new housing units	18.9	16.3	17.5	13.3	18.5	16.8
Creating commercial zones that will attract high-paying jobs	8.4	14.1	13.5	27.6	15.4	10.5

BUILDING HEIGHT & DENSITY TRADE-OFFS Concentrating new housing in taller, higher-density buildings downtown and near transit would allow more land in the City to be reserved for parks, recreation areas, and community amenities, and will minimize change to existing residential neighborhoods. Once apprised of this trade-off, respondents were simply asked whether they would support or oppose concentrating future housing in higher-density buildings up to 12 stories. Those who did not support buildings up to 12 stories were subsequently asked if they would support buildings up to eight stories. The answers to both questions are combined in Figure 11 on the next page.

When presented with the opportunity to reserve more land for parks, recreation areas, and community amenities *and* minimize change to existing neighborhoods, 63% of San Mateo residents indicated they would support concentrating new housing in higher-density buildings downtown and near transit up to 12 stories. A higher percentage (68%) indicated they would support buildings up to eight stories. In general, newer residents (less than 10 years), younger residents (under 35), those who anticipated living in the City 5 to 10 more years, those without a senior in the home, Caucasians, Asians, and those who completed the survey in English were the most

supportive of concentrating new housing in higher-density buildings up to eight stories downtown and near transit (see figures 12-14).

Question 9 *Concentrating new housing in taller, higher-density buildings downtown and near transit would allow more land to be reserved for parks, recreation areas, and community amenities, and will minimize change to existing residential neighborhoods. Knowing this, would you support or oppose concentrating future housing in higher-density buildings up to 12 stories.*

Question 10 *Would you support or oppose concentrating future housing in higher-density buildings up to 8 stories.*

FIGURE 11 SUPPORT CONCENTRATING FUTURE HOUSING IN HIGHER DENSITY BUILDINGS

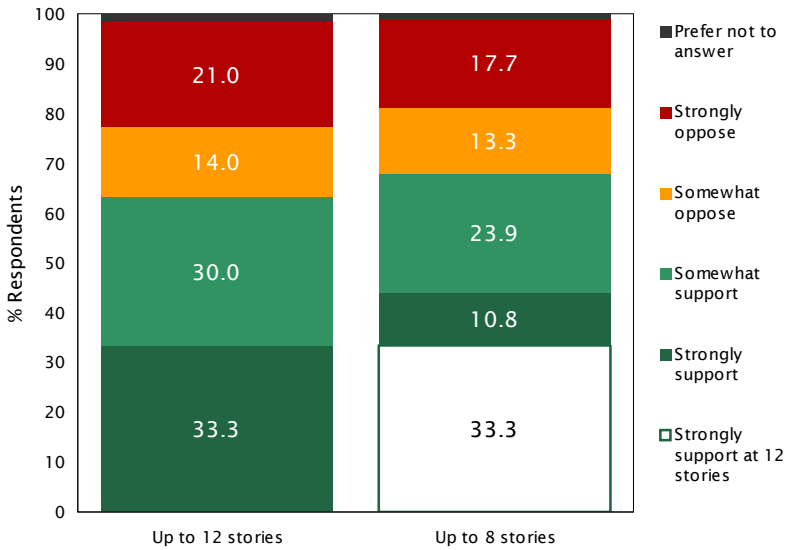
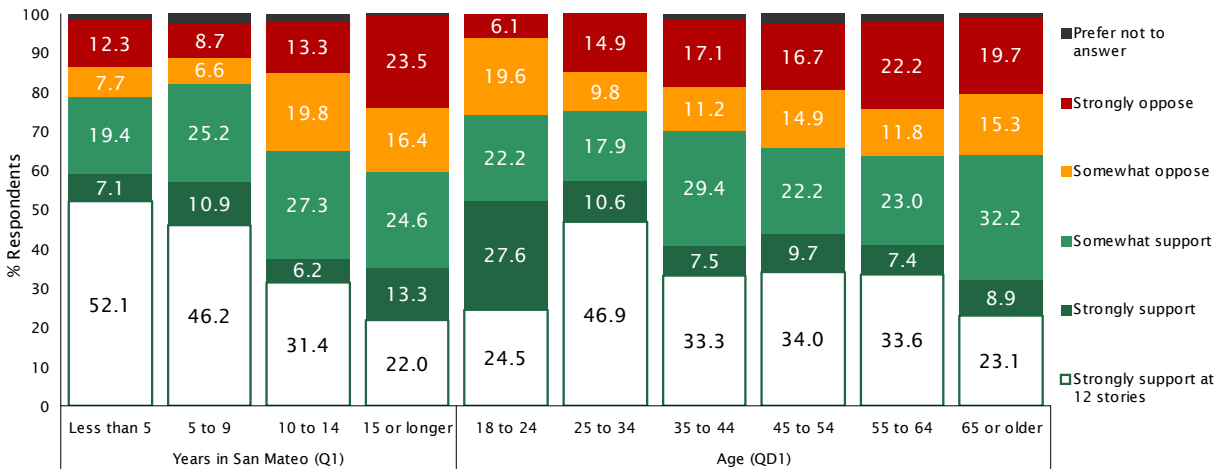


FIGURE 12 SUPPORT CONCENTRATING FUTURE HOUSING IN HIGHER DENSITY BUILDINGS UP TO 8 STORIES BY YEARS IN SAN MATEO & AGE



True North Research, Inc. © 2022

FIGURE 13 SUPPORT CONCENTRATING FUTURE HOUSING IN HIGHER DENSITY BUILDINGS UP TO 8 STORIES BY CHILD IN HSLD, ANTICIPATED YEARS IN SAN MATEO & ADULT OVER 65 IN HSLD

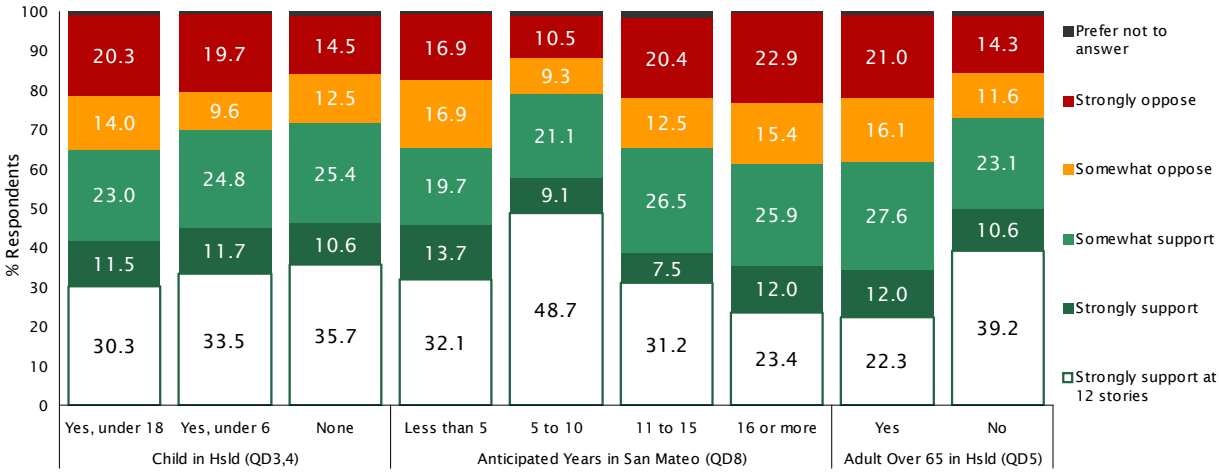
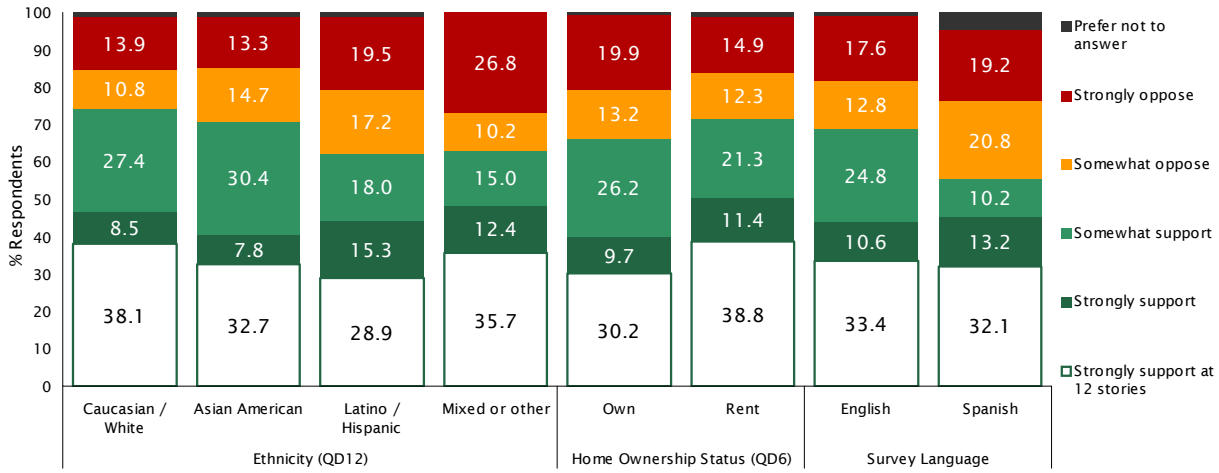


FIGURE 14 SUPPORT CONCENTRATING FUTURE HOUSING IN HIGHER DENSITY BUILDINGS UP TO 8 STORIES BY ETHNICITY, HOME OWNERSHIP STATUS & SURVEY LANGUAGE



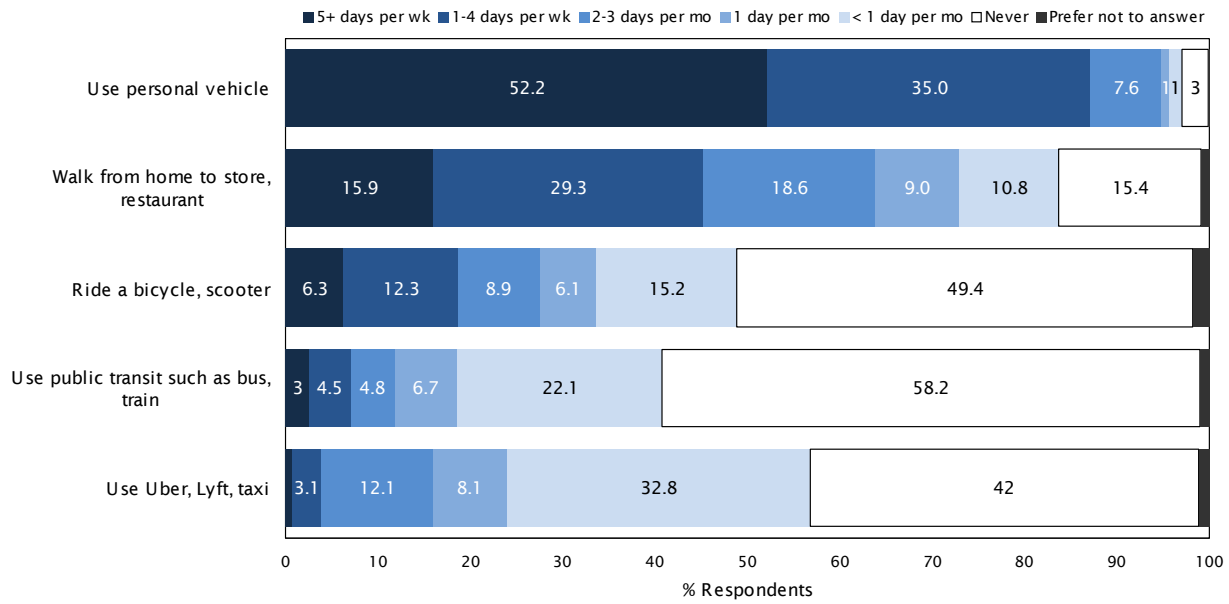
MOBILITY

One of the key challenges when planning for population growth and future housing is the issue of *mobility*. Put simply, adding housing and people to a community will naturally lead to more congestion and decreased mobility unless improvements are made to the transportation system to accommodate the additional demand and/or vehicle demand is mitigated through use of alternative modes. Accordingly, the survey explored how residents tend to travel within San Mateo, as well as the types of actions and strategies they would prioritize for minimizing growth-induced congestion in the future.

FREQUENCY OF MODE USE The first question in this series asked respondents how often they use each of the modes listed in Figure 15 when traveling within the City of San Mateo. As expected, the vast majority of residents (87%) indicated they use a personal vehicle on a weekly basis when traveling within the City of San Mateo, while 45% reported that they walk from their home to a local store or restaurant at least once per week. Less than one-in-five respondents indicated that they ride a bicycle or scooter (19%), use public transit such as a bus or train (8%), or use Uber, Lyft, or a taxi (4%) at least once per week when traveling within the City of San Mateo. For the interested reader, figures 16 and 17 show how reported frequency of mode use within the City of San Mateo varied by age, overall satisfaction with the City's efforts to provide municipal services, employment status, and ethnicity.

Question 11 *When traveling within the City of San Mateo, how often do you: _____?*

FIGURE 15 FREQUENCY OF MODE USE WITHIN CITY



True North Research, Inc. © 2022

FIGURE 16 FREQUENCY OF MODE USE WITHIN CITY BY OVERALL, AGE & OVERALL SATISFACTION

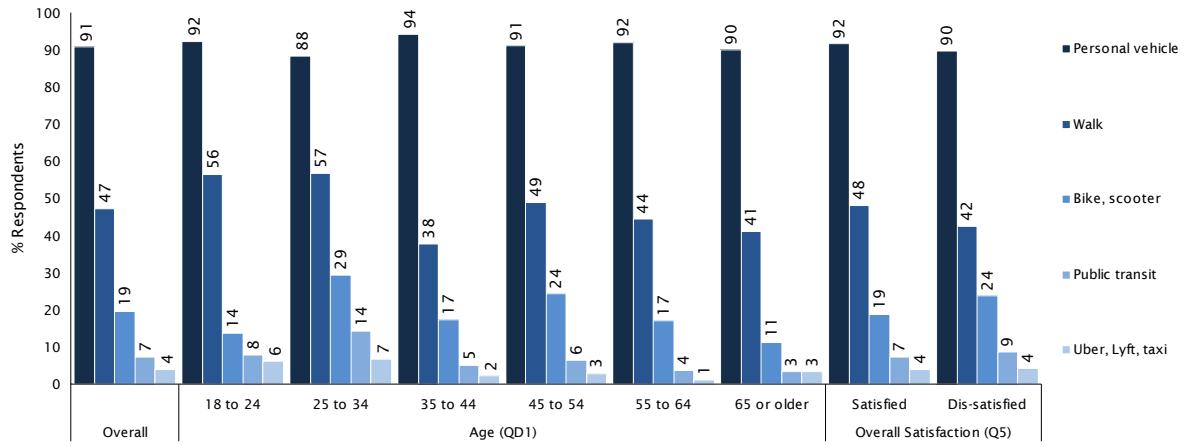
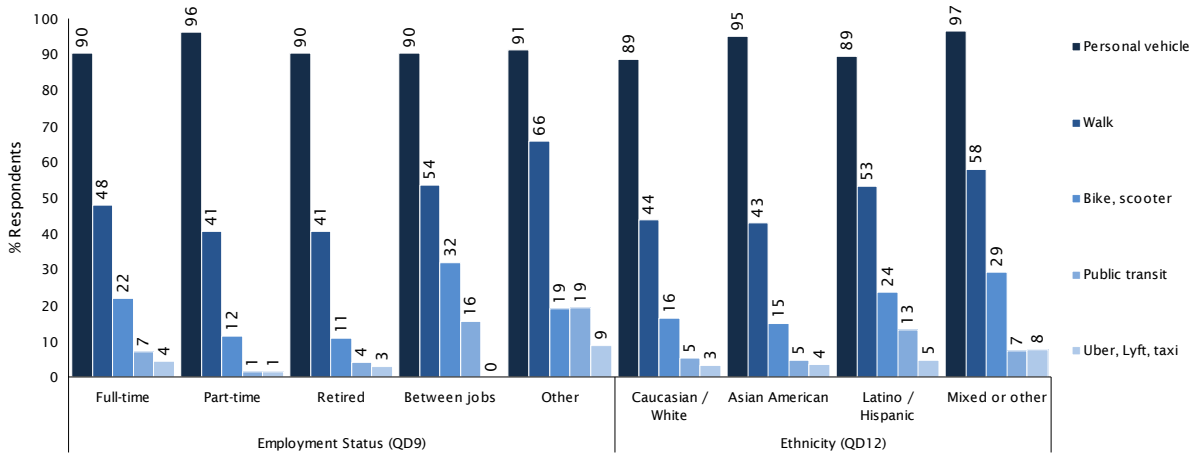


FIGURE 17 FREQUENCY OF MODE USE WITHIN CITY BY EMPLOYMENT STATUS & ETHNICITY

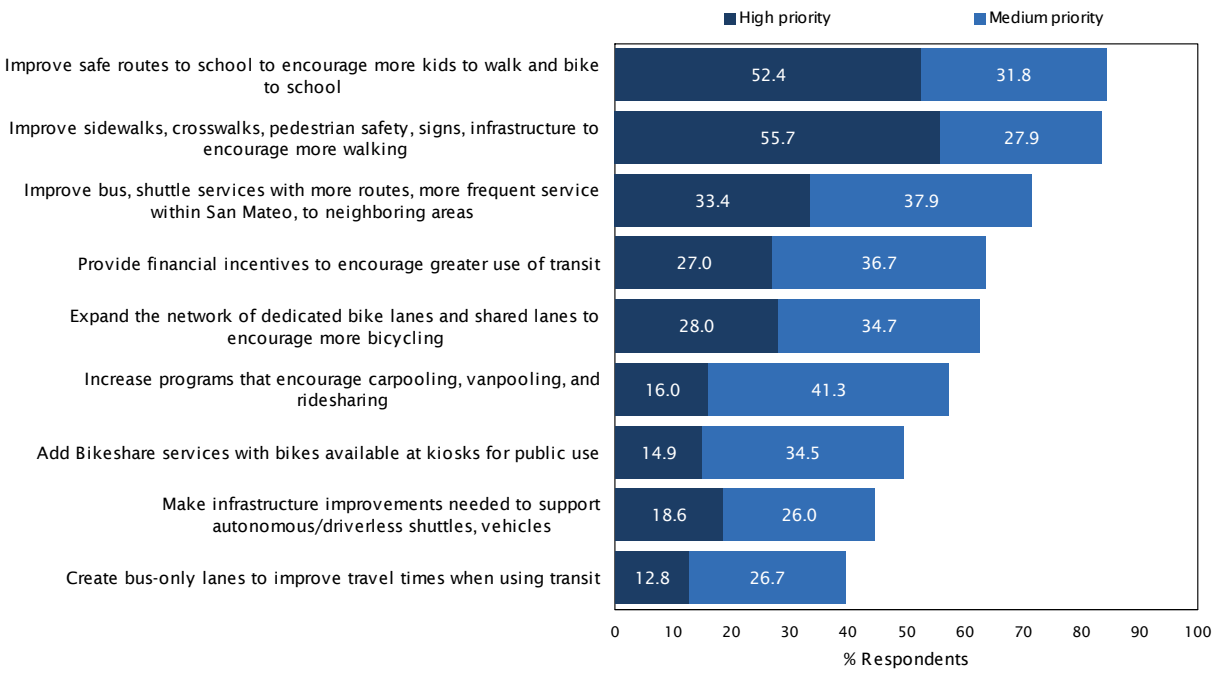


STRATEGIES TO REDUCE FUTURE CONGESTION The survey next transitioned to exploring residents' opinions about different actions the City could take in the future to reduce the number of vehicle trips people make by driving in a typical day. For each of the actions shown on the left of Figure 18, respondents were asked if the City should make the action a high priority, medium priority, or low priority for the City's future. Respondents were also allowed to indicate that the City should not take the action. Although presented in a random order for each respondent, the actions are sorted from high to low in the figure based on the percentage of respondents that indicated an action is a high or medium priority.

Improving safe routes to school to encourage more kids to walk and bike to school (84% high or medium priority) and improving sidewalks, crosswalks, pedestrian safety, signs and infrastructure to encourage more walking (84%) were widely viewed as the top priorities among the actions tested, followed by improving bus and shuttle services with more routes and more frequent service within San Mateo and to neighboring areas (71%), providing financial incentives to encourage greater use of transit use (64%), and expanding the network of dedicated bike lanes and shared lanes to encourage more bicycling (63%).

Question 12 *A growing population will naturally lead to greater traffic congestion in the future unless improvements are made to the City's transportation system and we find ways to reduce the number of trips people make by driving in a typical day. As I read the following list of actions that could be used to help reduce traffic congestion, please indicate whether you think the City should make it a high priority, a medium priority, or a low priority for the City's future. If you don't think the City should take the action, just say so. Please keep in mind that not all actions can be a high priority.*

FIGURE 18 STRATEGIES TO REDUCE TRAFFIC



Tables 17-20 show the percentage of respondents within each subgroup that identified an action as a *high* priority for the City's future. To ease comparisons, the three top-rated actions within each subgroup are highlighted in green. Most respondent subgroups rated the same three actions as the highest priorities—improving sidewalks, crosswalks, pedestrian safety, signs, and infrastructure to encourage more walking, improving safe routes to school to encourage more kids to walk and bike to school, and improving bus and shuttle services with more routes and more frequent service within San Mateo and to neighboring areas.

TABLE 17 STRATEGIES TO REDUCE TRAFFIC BY YEARS IN SAN MATEO & GENDER (SHOWING % HIGH PRIORITY)

	Years in San Mateo (Q1)				Gender (QD2)	
	Less than 5	5 to 9	10 to 14	15 or longer	Male	Female
Improve sidewalks, crosswalks, pedestrian safety, signs, infrastructure to encourage more walking	58.9	55.9	55.2	54.5	52.5	60.7
Improve safe routes to school to encourage more kids to walk and bike to school	53.1	51.4	48.2	53.4	49.3	55.9
Improve bus, shuttle services with more routes, more frequent service within San Mateo, to neighboring areas	36.2	30.4	29.4	34.0	29.8	39.2
Expand the network of dedicated bike lanes and shared lanes to encourage more bicycling	38.7	24.5	26.6	24.7	31.6	25.2
Provide financial incentives to encourage greater use of transit	31.5	27.8	20.4	26.3	28.6	25.9
Make infrastructure improvements needed to support autonomous/driverless shuttles, vehicles	19.9	18.1	24.5	17.0	21.6	15.6
Increase programs that encourage carpooling, vanpooling, and ridesharing	16.5	12.7	10.6	17.9	17.0	16.2
Add Bikeshare services with bikes available at kiosks for public use	15.4	11.0	17.3	15.3	15.5	15.1
Create bus-only lanes to improve travel times when using transit	17.7	3.4	9.6	14.0	12.7	13.5

TABLE 18 STRATEGIES TO REDUCE TRAFFIC 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
Improve sidewalks, crosswalks, pedestrian safety, signs, infrastructure to encourage more walking	50.7	49.6	60.0	64.7	53.7	56.9
Improve safe routes to school to encourage more kids to walk and bike to school	63.9	51.1	51.8	62.2	46.2	46.4
Improve bus, shuttle services with more routes, more frequent service within San Mateo, to neighboring areas	55.2	32.1	28.7	29.5	34.5	32.0
Expand the network of dedicated bike lanes and shared lanes to encourage more bicycling	33.2	34.7	23.8	34.1	25.9	20.8
Provide financial incentives to encourage greater use of transit	41.7	33.5	24.7	23.6	22.2	19.4
Make infrastructure improvements needed to support autonomous/driverless shuttles, vehicles	19.8	19.3	20.4	16.0	20.4	14.7
Increase programs that encourage carpooling, vanpooling, and ridesharing	24.1	12.4	13.3	14.1	15.7	21.4
Add Bikeshare services with bikes available at kiosks for public use	21.9	16.0	16.8	18.0	11.1	9.3
Create bus-only lanes to improve travel times when using transit	35.4	9.8	10.6	7.3	11.0	13.0

TABLE 19 STRATEGIES TO REDUCE TRAFFIC BY CHILD IN HSLD, ADULT OVER 65 IN HSLD & SURVEY LANGUAGE (SHOWING % HIGH PRIORITY)

	Child in Hsld (QD3,4)			Adult Over 65 in Hsld (QD5)		Survey Language	
	Yes, under 18	Yes, under 6	None	Yes	No	English	Spanish
Improve sidewalks, crosswalks, pedestrian safety, signs, infrastructure to encourage more walking	55.6	55.4	56.6	53.2	57.8	54.7	70.5
Improve safe routes to school to encourage more kids to walk and bike to school	60.7	57.7	49.5	48.6	54.6	51.4	67.3
Improve bus, shuttle services with more routes, more frequent service within San Mateo, to neighboring areas	28.6	21.3	36.0	35.2	33.0	32.8	42.4
Expand the network of dedicated bike lanes and shared lanes to encourage more bicycling	24.9	25.5	29.9	21.8	31.4	27.7	32.3
Provide financial incentives to encourage greater use of transit	20.2	17.5	30.1	21.9	29.5	26.9	28.3
Make infrastructure improvements needed to support autonomous/driverless shuttles, vehicles	16.5	18.7	19.1	14.0	20.3	18.7	16.9
Increase programs that encourage carpooling, vanpooling, and ridesharing	12.1	11.6	17.9	20.5	14.5	16.2	14.2
Add Bikeshare services with bikes available at kiosks for public use	17.7	22.4	14.0	12.5	16.6	14.3	23.0
Create bus-only lanes to improve travel times when using transit	11.8	7.1	13.3	13.5	12.3	12.8	12.5

TABLE 20 STRATEGIES TO REDUCE TRAFFIC BY ETHNICITY & HOME OWNERSHIP STATUS (SHOWING % HIGH PRIORITY)

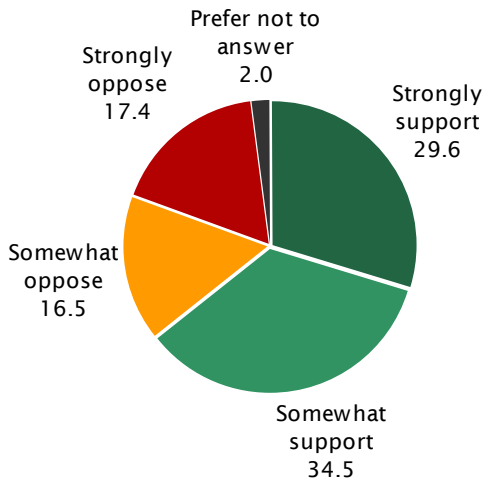
	Ethnicity (QD12)				Home Ownership Status (QD6)	
	Caucasian / White	Asian American	Latino / Hispanic	Mixed or other	Own	Rent
Improve sidewalks, crosswalks, pedestrian safety, signs, infrastructure to encourage more walking	56.2	50.3	55.8	70.3	55.1	58.3
Improve safe routes to school to encourage more kids to walk and bike to school	52.0	48.9	55.7	51.3	53.6	52.6
Improve bus, shuttle services with more routes, more frequent service within San Mateo, to neighboring areas	31.6	27.8	39.7	40.4	30.1	37.3
Expand the network of dedicated bike lanes and shared lanes to encourage more bicycling	28.4	23.9	30.7	32.2	26.0	31.1
Provide financial incentives to encourage greater use of transit	27.4	18.5	29.3	40.2	20.8	33.1
Make infrastructure improvements needed to support autonomous/driverless shuttles, vehicles	13.7	20.4	20.6	39.7	18.1	19.2
Increase programs that encourage carpooling, vanpooling, and ridesharing	14.9	14.1	17.6	26.0	16.3	15.5
Add Bikeshare services with bikes available at kiosks for public use	14.7	9.3	16.9	31.4	13.1	16.8
Create bus-only lanes to improve travel times when using transit	11.4	13.0	13.7	21.4	12.3	13.3

ACTIVE TRANSPORTATION TRADE-OFFS As with most aspects of planning, improvements in one area may require trade-offs in other areas. Adding bike lanes and widening sidewalks will make it easier to travel around the City without using a car and could help reduce traffic congestion and greenhouse gas emissions. However, adding bike lanes and widening sidewalks could also require removing a vehicle lane or parking spaces in certain locations.

When presented with the aforementioned trade-off, 64% of respondents indicated they generally support adding bike lanes and widening sidewalks in San Mateo, even if it requires removing a vehicle lane or parking spaces in certain locations. Approximately one-third of respondents (34%) opposed adding bike lanes or widening sidewalks if it involved this type of trade-off, while 2% were unsure or preferred to not answer the question (Figure 19).

Question 13 *Adding bike lanes and widening sidewalks will make it easier to travel around the City without using a car and could help reduce traffic congestion and greenhouse gas emissions. However, adding bike lanes and widening sidewalks could also require removing a vehicle lane or parking spaces in certain locations. Knowing this, do you generally support or oppose adding bike lanes and widening sidewalks in San Mateo?*

FIGURE 19 SUPPORT ADDING BIKE LANES, WIDENING SIDEWALKS IN SAN MATEO



Figures 20-24 show how support for adding bike lanes and widening sidewalks even if it involves removing a vehicle lane or parking spaces in certain locations varied across subgroups of San Mateo residents. Newer residents (less than 5 years), younger residents (under 25), those not living with a child, those in 'other' employment categories (homemaker/student), and those who use public transit and/or a bicycle/scooter to travel within the City on a weekly basis were the most supportive of adding bike lanes and widening sidewalks. That said, a majority of respondents in every subgroup expressed support for adding bike lanes and widening sidewalks, even if it involved the stated trade-offs.

FIGURE 20 SUPPORT ADDING BIKE LANES, WIDENING SIDEWALKS IN SAN MATEO BY YEARS IN SAN MATEO & AGE

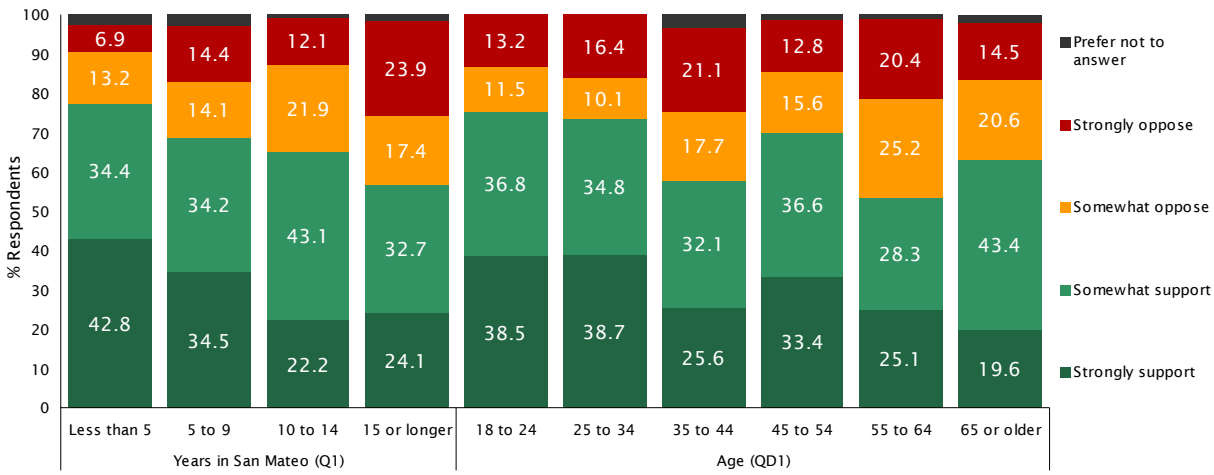


FIGURE 21 SUPPORT ADDING BIKE LANES, WIDENING SIDEWALKS IN SAN MATEO BY CHILD IN HSLD & ANTICIPATED YEARS IN SAN MATEO

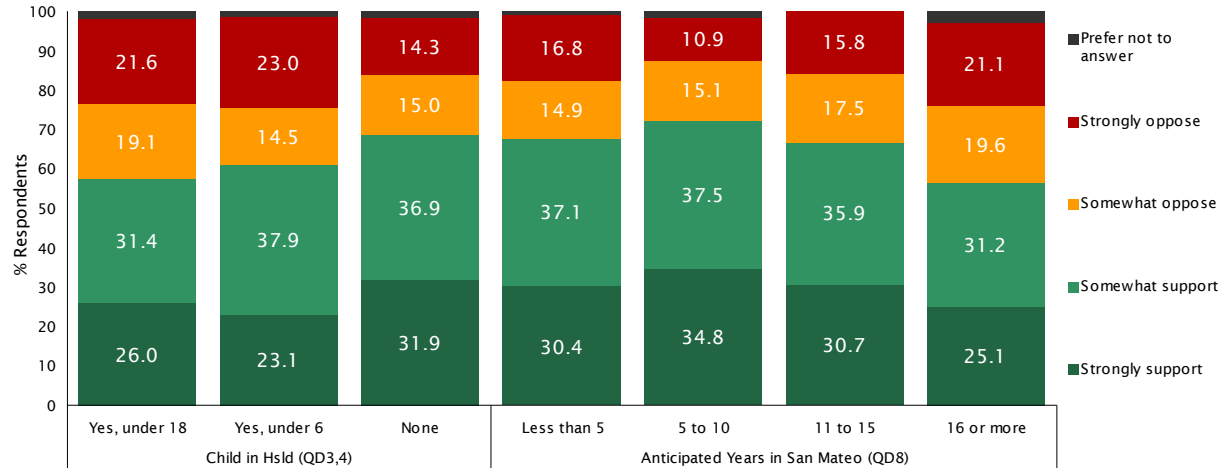


FIGURE 22 SUPPORT ADDING BIKE LANES, WIDENING SIDEWALKS IN SAN MATEO BY ETHNICITY, HOME OWNERSHIP STATUS & SURVEY LANGUAGE

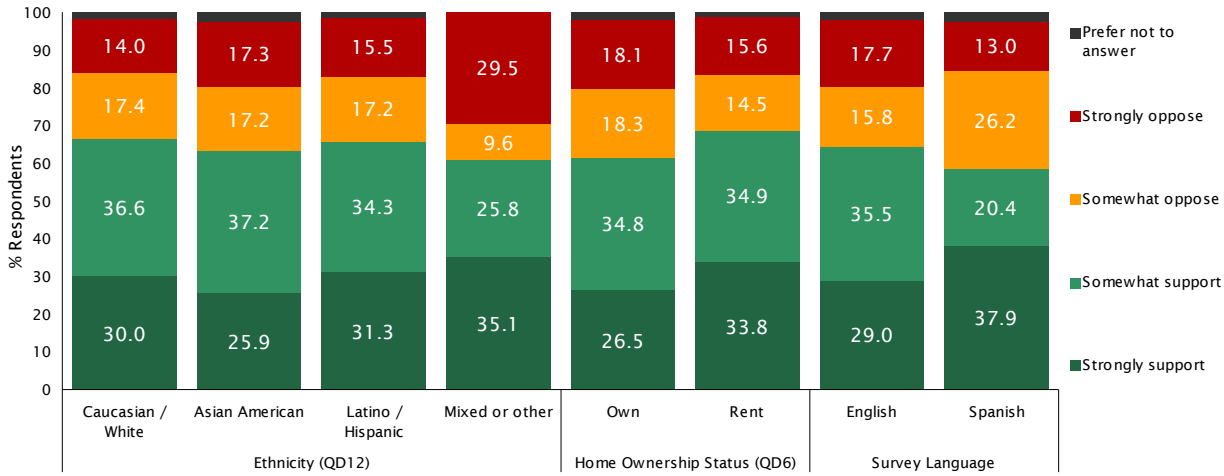


FIGURE 23 SUPPORT ADDING BIKE LANES, WIDENING SIDEWALKS IN SAN MATEO BY EMPLOYMENT STATUS & WORK COMMUTE STATUS

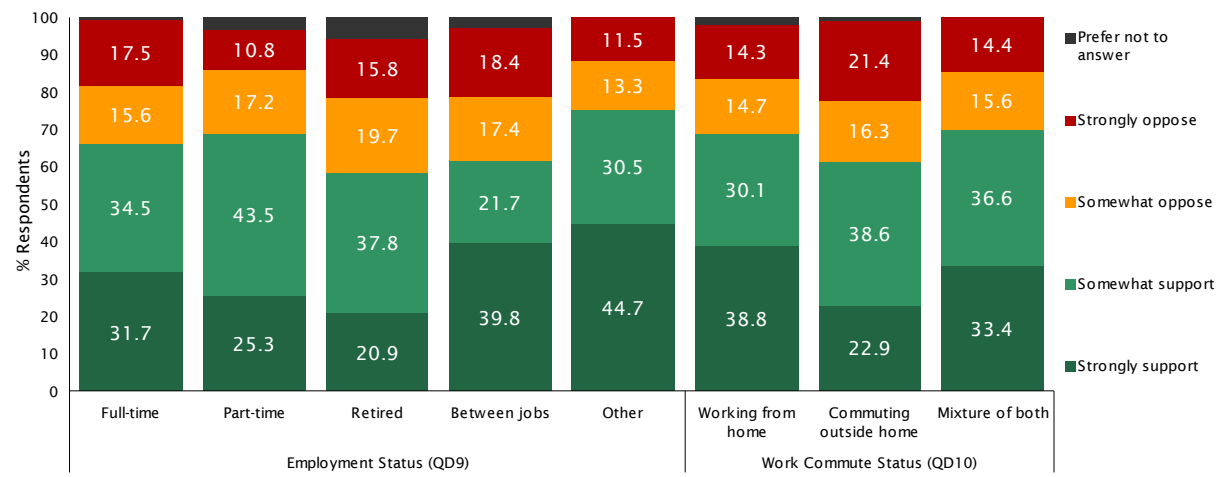
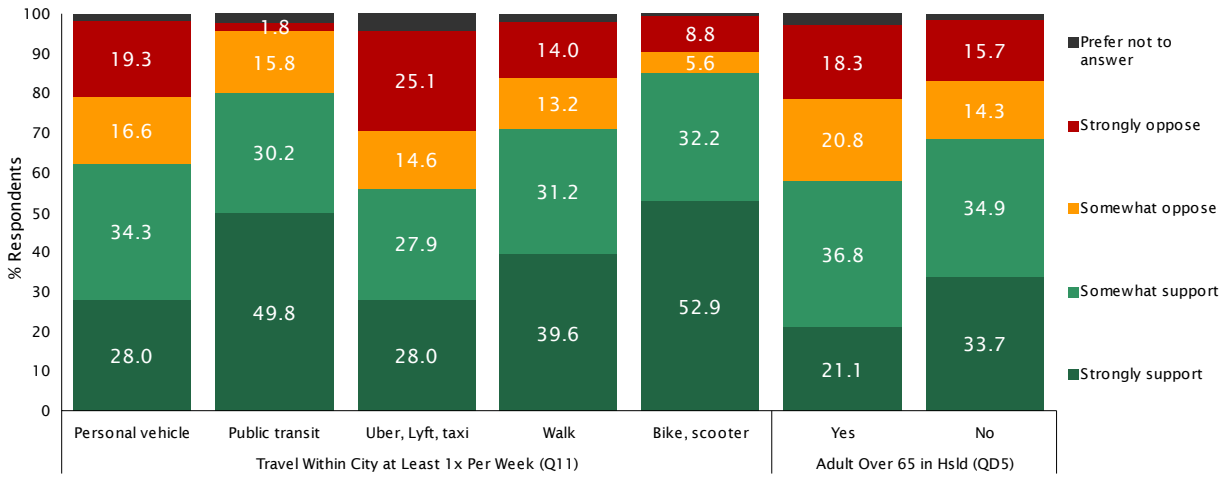


FIGURE 24 SUPPORT ADDING BIKE LANES, WIDENING SIDEWALKS IN SAN MATEO BY TRAVELING WITHIN CITY AT LEAST 1X PER WEEK & ADULT OVER 65 IN HSLD



COMMUNICATIONS

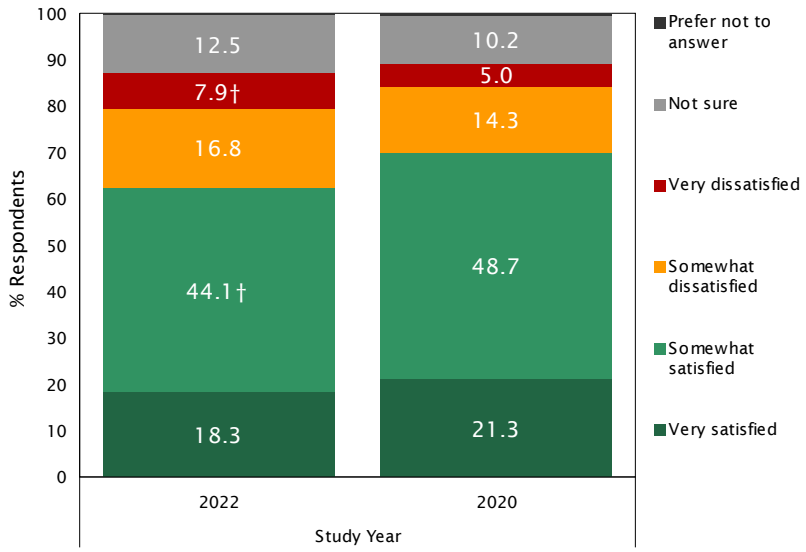
The importance of city communication with residents cannot be over-stated. Much of a city's success is shaped by the quality of information that is exchanged in both directions, from the City to the community and from the community to the City. This study is just one example of San Mateo' efforts to 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 14 asked San Mateo residents to report their satisfaction with city-resident communication. Overall, 62% of respondents indicated they were satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means in 2022. The remaining respondents were either dissatisfied with the City's efforts in this respect (25%) or unsure of their opinion (13%). When compared to 2020, there was a statistically significant decline in resident satisfaction with the City's communication efforts.

Question 14 *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 25 SATISFACTION WITH COMMUNICATION BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

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, home ownership status, and survey language. As is often the case, residents dissatisfied with the City's *overall* performance were also the least satisfied with the City's communication efforts, whereas those generally satisfied with the City were the among the most satisfied with city-resident communication.

FIGURE 26 SATISFACTION WITH COMMUNICATION BY YEARS IN SAN MATEO, CHILD IN HSLD & ADULT OVER 65 IN HSLD

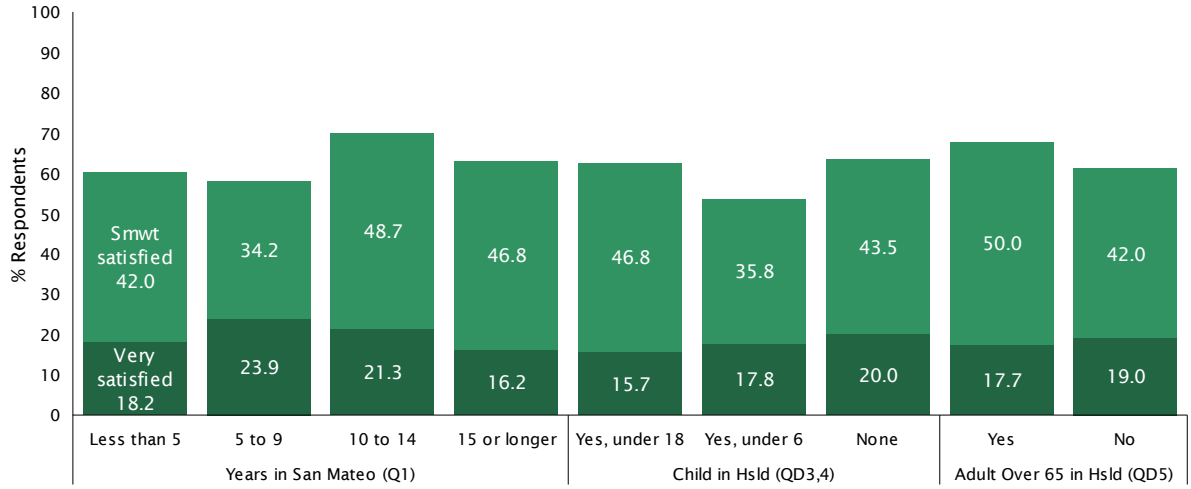


FIGURE 27 SATISFACTION WITH COMMUNICATION BY AGE & GENDER

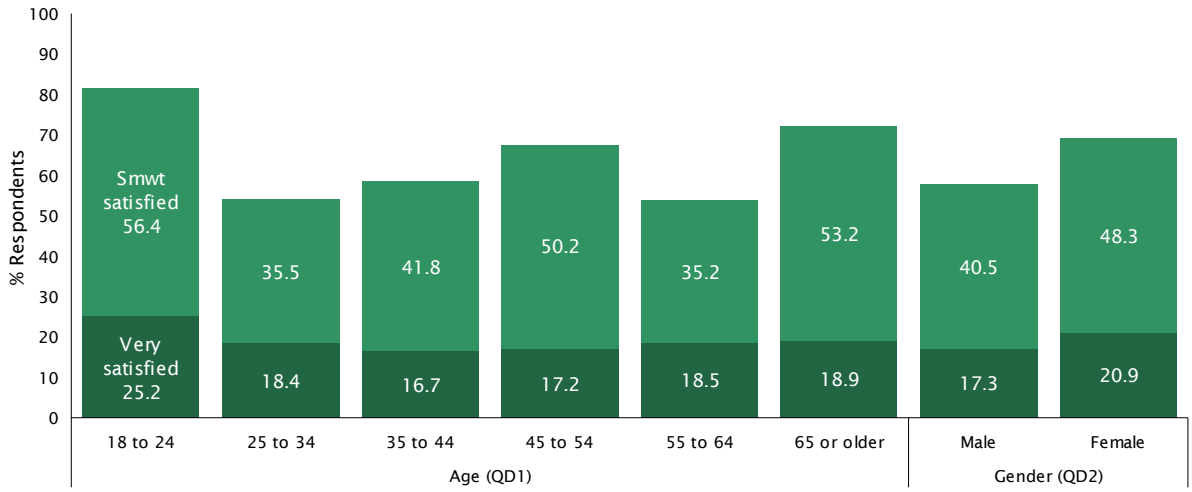
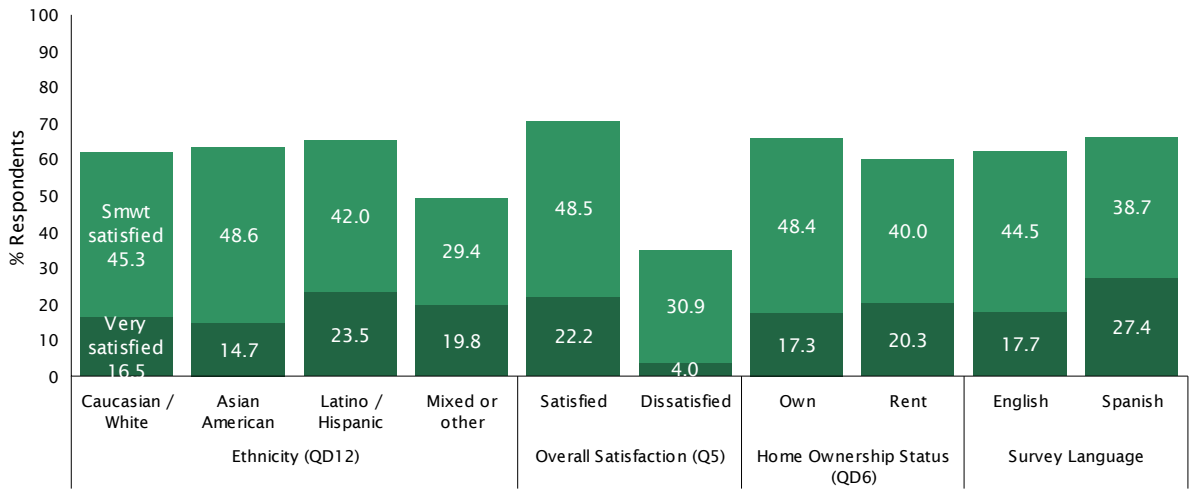


FIGURE 28 SATISFACTION WITH COMMUNICATION BY ETHNICITY, OVERALL SATISFACTION, HOME OWNERSHIP STATUS & SURVEY LANGUAGE



TOPICS OF INTEREST All respondents were next asked if there was a particular topic or issue about which they'd like to receive more information from the City (Question 15) and—if yes—to describe the topic (Question 16). As shown in figures 29-32, 30% of respondents indicated the were interested in receiving more information from the City, with those expressing dissatisfaction with the City's communication efforts and overall performance in providing municipal services being the most likely to desire more information from the City.

Question 15 *Is there a particular topic or issue that you'd like to receive more information about from the City?*

FIGURE 29 INTERESTED IN RECEIVING MORE INFORMATION ABOUT CITY

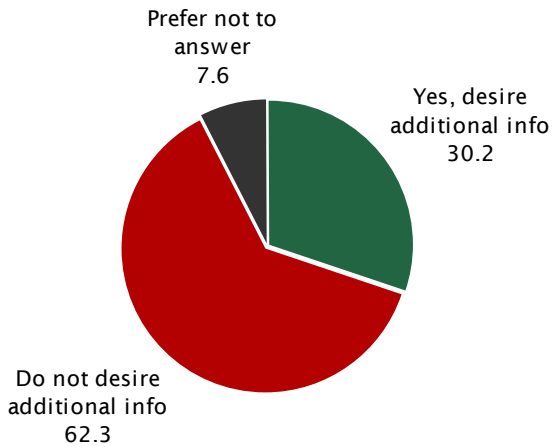


FIGURE 30 INTERESTED IN RECEIVING MORE INFORMATION ABOUT CITY BY YEARS IN SAN MATEO, CHILD IN HSLD & ADULT OVER 65 IN HSLD

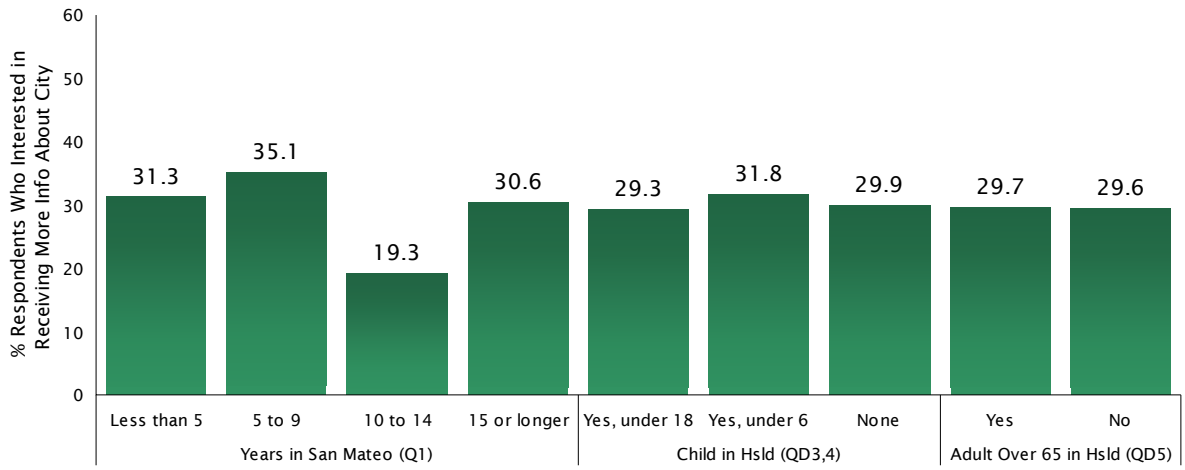


FIGURE 31 INTERESTED IN RECEIVING MORE INFORMATION ABOUT CITY BY AGE & GENDER

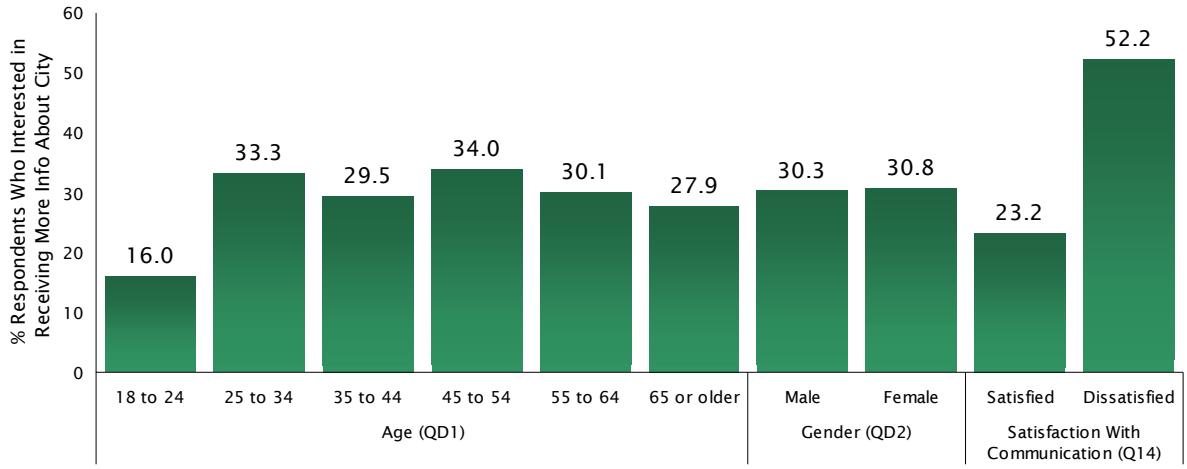
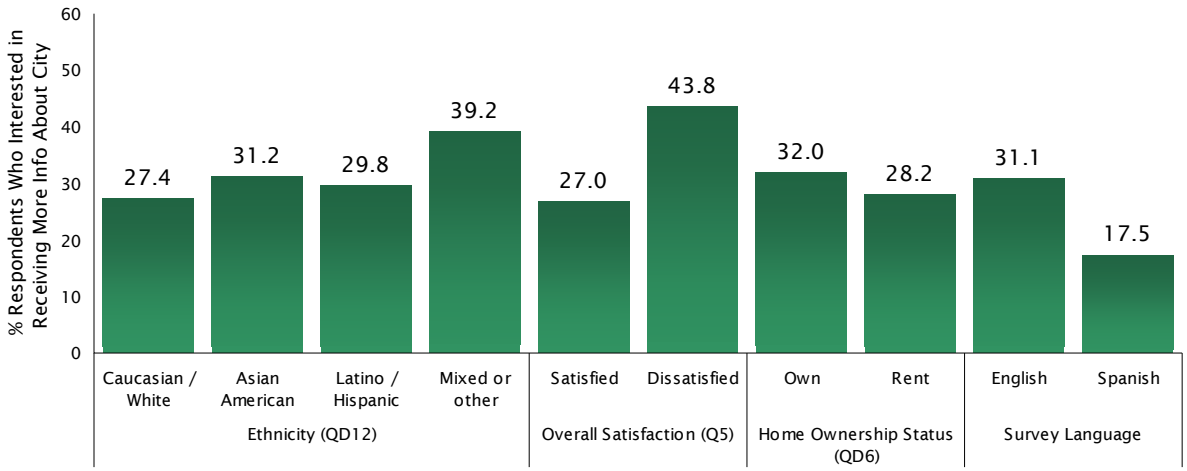


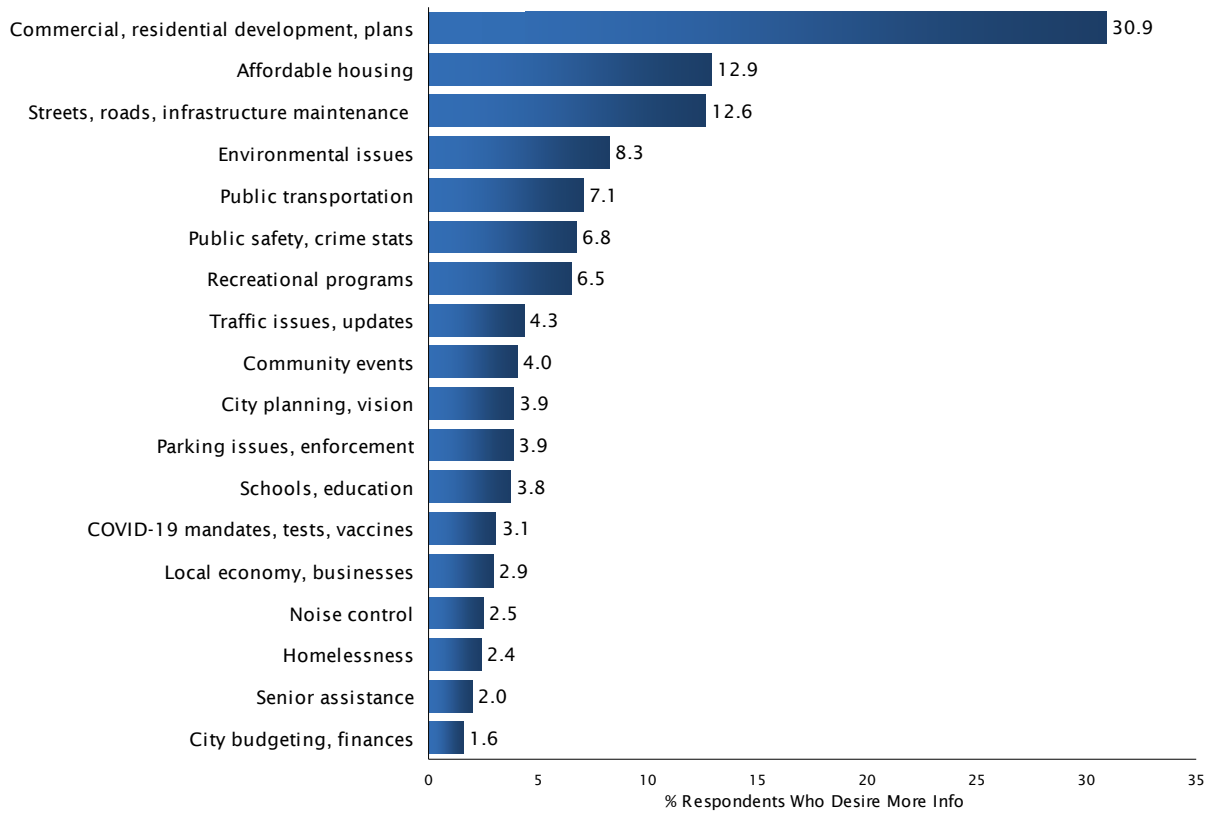
FIGURE 32 INTERESTED IN RECEIVING MORE INFORMATION ABOUT CITY BY ETHNICITY, OVERALL SATISFACTION, HOME OWNERSHIP STATUS & SURVEY LANGUAGE



As for the specific topics of interest to those seeking more information from the City (see Figure 33), the most commonly mentioned were information about the City's future commercial and residential development plans (31%), affordable housing (13%), street/road and infrastructure maintenance (13%), environmental issues (8%), public transportation (7%), public safety/crime statistics (7%), and recreation programs (7%).

Question 16 *Please briefly describe the topic.*

FIGURE 33 INFORMATION TOPICS DESIRED

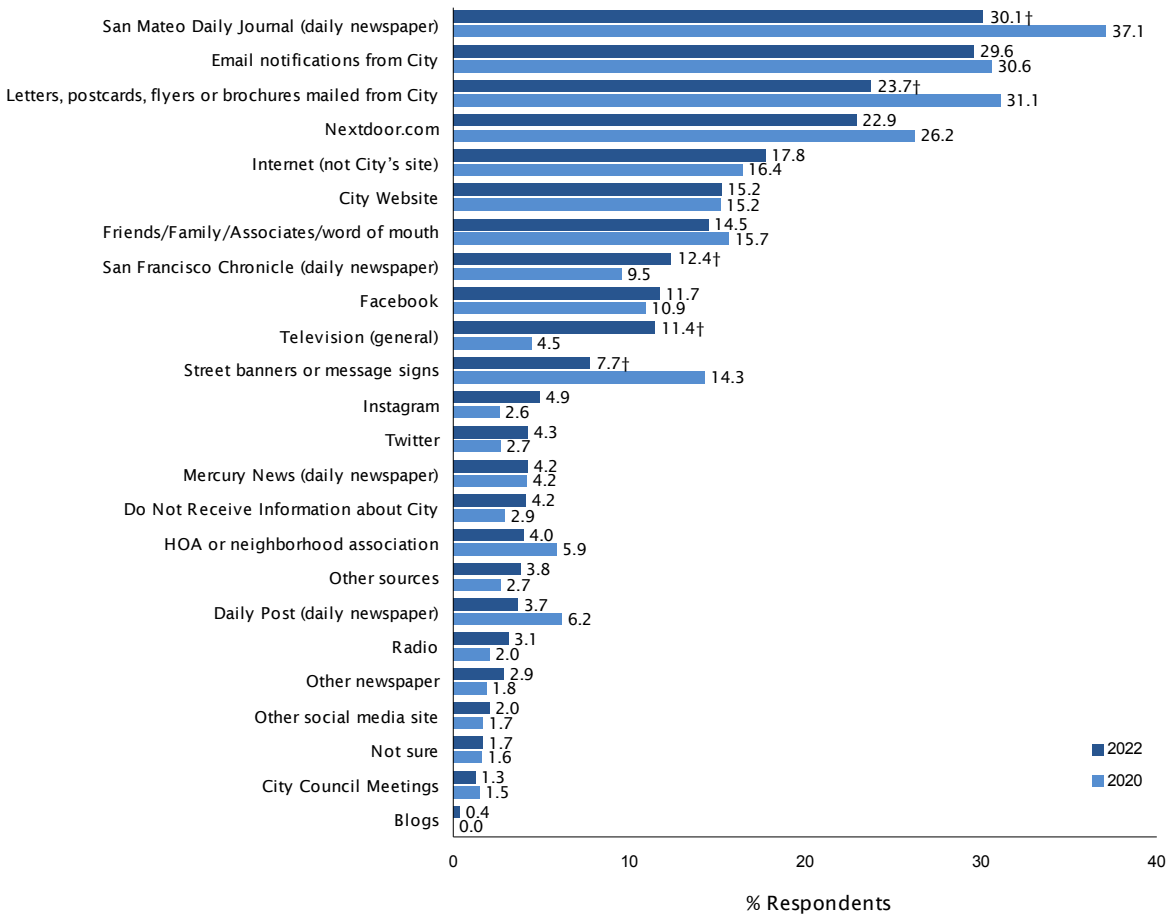


SOURCES OF INFORMATION To help the City identify the most effective means of communicating with residents, it is helpful to understand what information sources they currently rely on for this type of information. Question 17 asked respondents to identify the top three information sources they typically 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 34 on the next page represent the percentage of residents who mentioned a particular source and thus sum to more than 100.

The most frequently cited sources for City information in 2022 were the San Mateo Daily Journal and email notifications from the City, both mentioned by 30% of respondents. These sources were followed by letters, postcards, flyers, or brochures mailed to the home from the City (24%), Nextdoor (23%), the Internet not including the City's site (18%), the City's website (15%), and friends/family/associates/word of mouth (15%). When compared to the 2020 survey results, the percentage who cited the San Mateo Daily Journal, letters, postcards, flyers, or brochures mailed to the home by the City, and street banners/signs declined significantly, whereas mentions of the San Francisco Chronicle and television increased significantly. Figures 35-37 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.

Question 17 *What information sources do you use to find out about City of San Mateo news, events, and programs?*

FIGURE 34 INFORMATION SOURCES BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

FIGURE 35 INFORMATION SOURCES BY STUDY YEAR BY OVERALL, AGE & SATISFACTION WITH COMMUNICATION

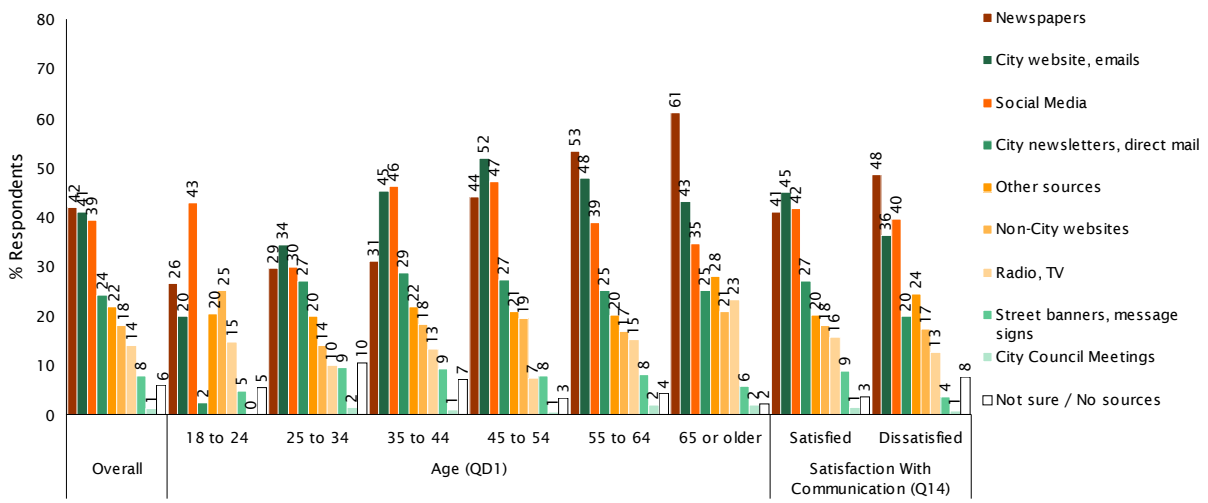


FIGURE 36 INFORMATION SOURCES BY STUDY YEAR BY ETHNICITY, CHILD IN HSLD & ADULT OVER 65 IN HSLD

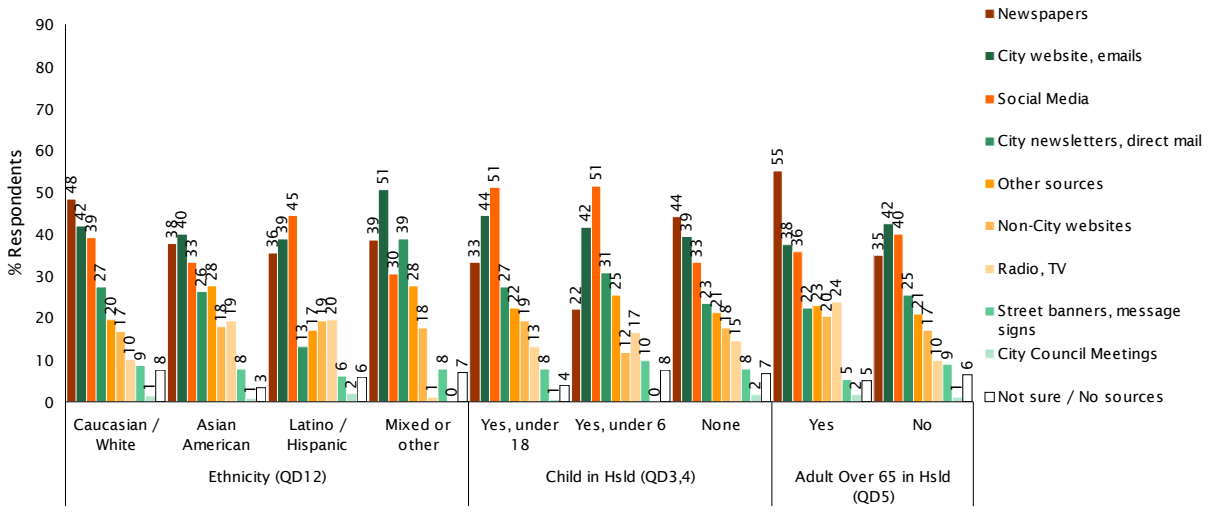
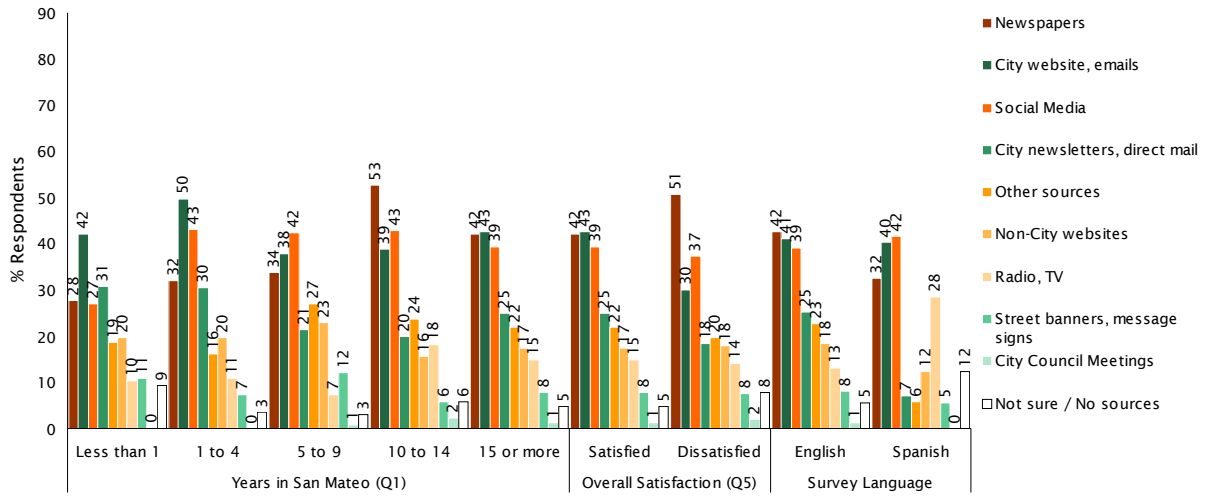


FIGURE 37 INFORMATION SOURCES BY STUDY YEAR BY YEARS IN SAN MATEO, OVERALL SATISFACTION & SURVEY LANGUAGE



COMMUNICATION PREFERENCES The final substantive question of the survey presented residents with the methods shown to the left of Figure 38 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 (84% very or somewhat effective), followed by postcards, letters, and newsletters mailed to the home (i.e., direct mail, 78%), social media like Facebook, Twitter, and Nextdoor (78%), and the City's website (72%). Townhall meetings (52%), television programs (41%), and advertisements in local papers (40%) were generally viewed by residents as less effective ways for the City to communicate with them. When compared to 2020, the perceived effectiveness of email declined by a small, but statistically significant 4% (see Table 21).

Question 18 *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 38 EFFECTIVENESS OF COMMUNICATION METHODS

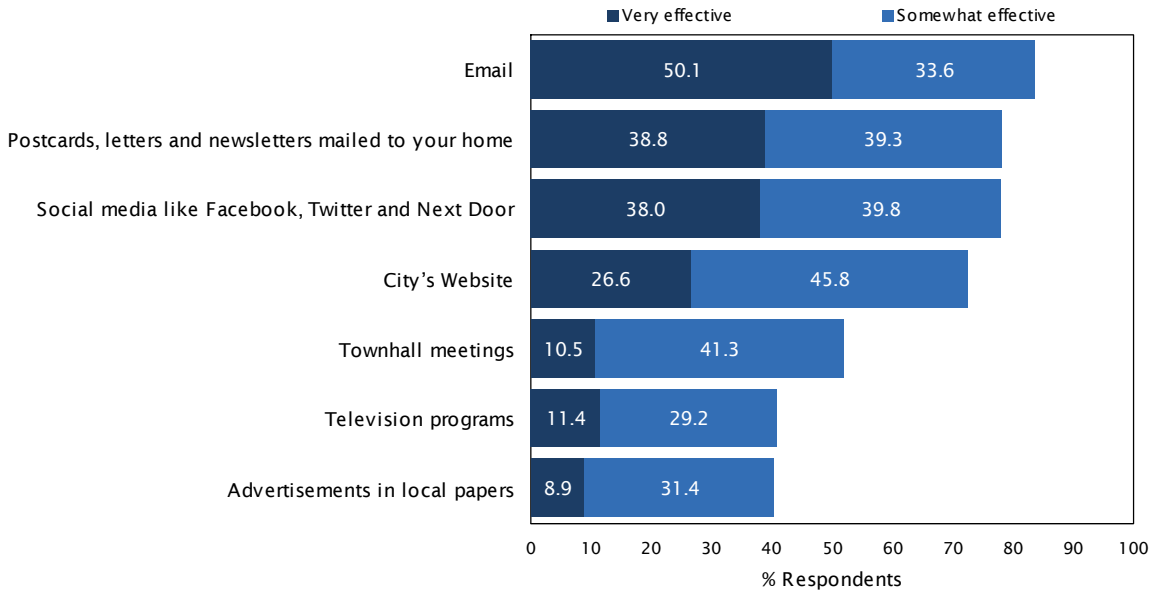


TABLE 21 EFFECTIVENESS OF COMMUNICATION METHODS BY STUDY YEAR

	Study Year 2022	Study Year 2020	Change in Very + Smwt Effective 2020 to 2022
City's Website	72.4	69.3	+3.1
Townhall meetings	51.9	49.3	+2.6
Television programs	40.7	39.6	+1.1
Social media like Facebook, Twitter and Next Door	77.8	76.8	+1.1
Postcards, letters and newsletters mailed to your home	78.0	78.7	-0.7
Advertisements in local papers	40.3	43.4	-3.1
Email	83.7	87.9	-4.1†

† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

Tables 22-24 show how the percentage of residents that rated each communication method as *very effective* varied depending on their age, ethnicity, satisfaction with the City's overall efforts to provide municipal services, presence and age(s) of children in the home, satisfaction with city-resident communication, and survey language.

TABLE 22 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
Email	44.6	45.5	54.6	52.5	55.1	51.5
Postcards, letters and newsletters mailed to your home	46.2	37.0	42.7	33.3	42.4	37.1
Social media like Facebook, Twitter and Next Door	62.5	43.0	39.6	41.9	35.4	20.6
City's Website	33.5	26.7	22.7	33.5	28.1	21.0
Television programs	12.5	6.9	10.5	11.9	12.7	13.2
Townhall meetings	17.7	6.6	10.2	7.9	10.6	12.3
Advertisements in local papers	17.9	6.4	7.1	5.4	9.7	9.2

TABLE 23 EFFECTIVENESS OF COMMUNICATION METHODS BY ETHNICITY & OVERALL SATISFACTION (SHOWING % VERY EFFECTIVE)

	Ethnicity (QD12)				Overall Satisfaction (Q5)	
	Caucasian / White	Asian American	Latino / Hispanic	Mixed or other	Satisfied	Dissatisfied
Email	54.4	49.5	46.4	45.6	49.3	49.8
Postcards, letters and newsletters mailed to your home	40.5	30.6	40.3	42.2	40.4	38.5
Social media like Facebook, Twitter and Next Door	38.9	33.4	42.9	30.7	27.1	43.1
City's Website	24.2	24.0	30.0	30.4	25.3	27.8
Television programs	9.5	14.8	9.2	12.8	14.7	9.1
Townhall meetings	12.3	2.7	11.9	15.0	12.7	9.4
Advertisements in local papers	6.6	7.1	11.9	10.9	11.7	7.5

TABLE 24 EFFECTIVENESS OF COMMUNICATION METHODS BY CHILD IN HSLD, SATISFACTION WITH COMMUNICATION & SURVEY LANGUAGE (SHOWING % VERY EFFECTIVE)

	Child in Hsld (QD3,4)			Satisfaction With Communication (Q14)		Survey Language	
	Yes, under 18	Yes, under 6	None	Satisfied	Dissatisfied	English	Spanish
Email	52.8	48.7	48.5	52.3	48.6	50.1	50.8
Postcards, letters and newsletters mailed to your home	39.5	42.7	38.7	41.7	36.6	38.6	41.0
Social media like Facebook, Twitter and Next Door	45.0	43.0	35.4	42.1	35.6	37.9	39.8
City's Website	25.6	19.5	27.6	30.3	21.7	26.0	34.4
Television programs	10.6	13.0	11.3	11.6	12.8	11.6	9.7
Townhall meetings	7.6	9.4	11.9	10.3	12.3	10.5	10.6
Advertisements in local papers	7.2	6.0	9.3	9.5	8.8	8.7	12.3

TABLE 25 DEMOGRAPHICS OF SAMPLE BY STUDY YEAR

	Study Year 2022	2020
Total Respondents	*775*	*1,276*
Years in San Mateo (Q1)		
Less than 1	5.7	5.8
1 to 4	16.7	18.5
5 to 9	14.8	12.8
10 to 14	10.8	10.1
15 or more	51.9	52.4
Prefer not to answer	0.1	0.4
Age (QD1)		
18 to 24	8.6	9.0
25 to 34	23.4	20.5
35 to 44	17.8	21.0
45 to 54	15.2	16.8
55 to 64	13.7	12.8
65 or older	16.8	15.7
Prefer not to answer	4.3	4.2
Child in Hsld (QD3,4)		
Yes, under 18	28.6	34.3
Yes, under 6	11.8	16.5
None	67.1	60.5
Prefer not to answer	4.4	5.2
Adult Over 65 in Hsld (QD5)		
Yes	29.2	32.1
No	66.2	63.0
Prefer not to answer	4.6	4.9
Home Ownership Status (QD6)		
Own	49.5	56.7
Rent	45.8	40.1
Prefer not to answer	4.7	3.2
Home Type (QD7)		
Single family	51.8	60.1
Townhome	7.5	8.4
Condo	10.9	9.6
Apartment	26.0	18.5
Prefer not to answer	3.9	3.3
Anticipated Years in San Mateo (QD8)		
Less than 5	20.5	20.0
5 to 10	29.6	25.2
11 to 15	9.2	10.5
16 or more	32.1	33.7
Prefer not to answer	8.6	10.5
Employment Status (QD9)		
Full-time	61.4	63.4
Part-time	5.8	5.3
Student	5.3	5.4
Homemaker	1.1	2.5
Retired	18.0	15.6
Between jobs	3.8	2.2
Prefer not to answer	4.6	5.5
Ethnicity (QD12)		
Caucasian / White	39.2	39.8
Asian American	21.6	18.3
Latino / Hispanic	27.4	23.5
Mixed or other	7.3	10.4
Prefer not to answer	4.5	8.0
Gender		
Male	47.8	45.2
Female	46.1	50.5
Not listed	0.2	0.6
Prefer not to answer	5.9	3.7

Table 25 presents the key demographic information collected during the survey. In additional to providing insights into how the results of the survey vary across demographic subgroups, the information is also used to ensure that the survey sample matches the profile of San Mateo's adult population on key characteristics based on the latest Census figures.

METHODOLOGY

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

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the City of San 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 indicated they were interested in additional information from the City (Question 15) were subsequently asked to briefly describe their topics of interest (Question 16). The questionnaire included with this report (see *Questionnaire & Toplines* on page 50) 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.

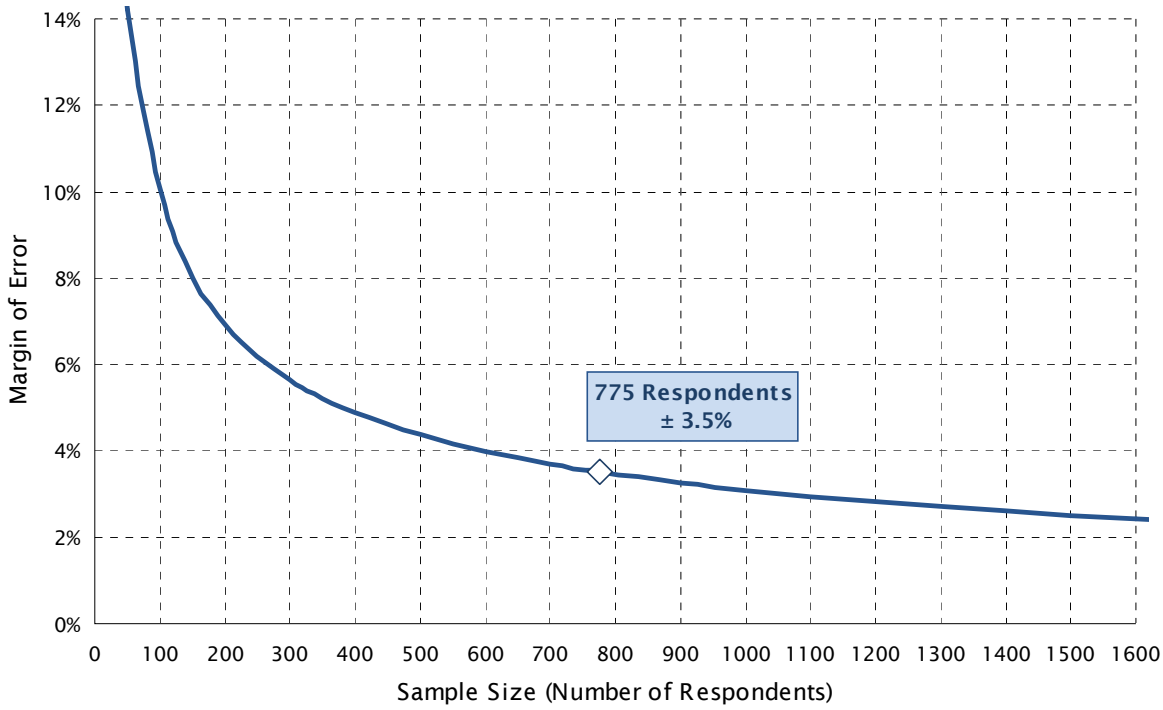
SAMPLE, RECRUITING & DATA COLLECTION A comprehensive database of households in the City of San Mateo was utilized for this study, ensuring that all households in San Mateo had the opportunity to be selected for the survey. After random selection, households were recruited to participate in the survey using a combination of mailed letters, email invitations, text invitations, and telephone calls to both land lines and mobile lines, as appropriate. The mail, email, and text 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 recruited by telephone to households that had yet to participate in the online survey in response to the mail, email, and/or text 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 775 completed surveys were gathered online and by telephone between January 21 and February 2, 2022.

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 775 adult residents for a particular question and what would have been found if all of the estimated 83,578 adult residents[3] had been interviewed.

Figure 39 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 ± 3.5% for questions answered by all 775 respondents.

FIGURE 39 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 39 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

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

3. US Census Bureau estimate, April 2020.

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%.

TRUE NORTH RESEARCH

City of San Mateo – Community Opinion Survey
Phone Version
Final Toplines (n=775)
February 2022

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	17%
3	5 to 9 years	15%
4	10 to 14 years	11%
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?

	Always ask A first, then randomize remaining items	Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
A	The overall quality of life in the City of San Mateo	24%	61%	11%	3%	1%	0%	0%
B	San Mateo as a place to raise a family	26%	42%	17%	3%	3%	7%	2%
C	San Mateo as a place to work	18%	44%	16%	3%	1%	16%	2%
D	San Mateo as a place to retire	10%	27%	23%	18%	10%	12%	1%
E	San Mateo as a place to shop and dine	26%	51%	18%	3%	1%	0%	0%
F	San Mateo as a place to recreate	18%	41%	28%	5%	3%	5%	1%

True North Research, Inc. © 2021

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	24%
	Shopping, dining opportunities	16%
	Not sure / Cannot think of anything specific	13%
	Proximity to surrounding cities, areas	12%
	Open, green space, mountains	12%
	Diversity of businesses, cultures, activities	9%
	Small town atmosphere	8%
	Low crime, public safety	7%
	Downtown area	7%
	Friendly people, neighbors	6%
	Weather, clean air	5%
	Good schools	4%
	Clean, well-maintained	3%
	Sense of community	3%
	Access to bay, ocean	3%
	Access to public transportation	3%
	Affordable houses	2%
	Historical places	2%
	Outdoor activities	2%
	Less crowded, traffic than other cities	2%
	Family friendly	2%
	Availability of parking	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	19%
	Limit growth, preserve open space	13%
	Not sure / Cannot think of anything specific	10%
	Improve public safety, more police presence	8%
	Improve, maintain infrastructure, streets, roads	7%
	Provide more shopping, dining opportunities	6%
	Reduce traffic congestion	6%
	Reduce cost of living	5%
	Address parking issues	5%

	Reduce taxes, fees	4%
	Beautify, clean up City	4%
	No changes needed / Everything is fine	4%
	Add, improve bike lanes	3%
	Improve, add parks, rec facilities	3%
	Reduce building permit restrictions	3%
	Enforce traffic laws	3%
	Improve public transit	3%
	Improve economy, jobs	3%
	Provide more activities, events for all ages	3%
	Improve schools, education	2%
	Address homeless issues	2%
	Improve City Council, gov process	2%
	Improve downtown area	2%
	Improve environmental efforts	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? *Get answer, then ask:* Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?	
	1 Very satisfied	25%
	2 Somewhat satisfied	49%
	3 Somewhat dissatisfied	11%
	4 Very dissatisfied	5%
	98 Not sure	10%
	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? *Get answer. If 'satisfied' or 'dissatisfied', then ask*: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?						
	Randomize	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide police and crime prevention services	26%	43%	13%	8%	11%	1%
B	Promote economic development to attract new businesses and good-paying jobs to the community	12%	36%	17%	7%	25%	3%
C	Prepare the city for emergencies and natural disasters	14%	37%	13%	3%	31%	1%
D	Provide fire protection, prevention and emergency medical services	39%	41%	4%	2%	14%	1%
E	Manage traffic congestion	10%	35%	30%	19%	7%	0%
F	Address homelessness	8%	25%	25%	20%	20%	2%
G	Maintain public buildings and facilities like City Hall, libraries and parking garages	36%	48%	6%	2%	9%	0%
H	Maintain local streets and roads	13%	39%	26%	19%	3%	0%
I	Maintain storm drains, sewers and creeks	19%	47%	15%	7%	12%	1%
J	Provide parks, sports fields and recreation facilities	38%	46%	9%	4%	3%	0%
K	Provide a variety of recreation programs for all ages	27%	37%	12%	3%	19%	1%
L	Provide special events like community festivals and holiday celebrations	19%	43%	16%	6%	15%	2%
M	Enforce code violations to address issues like abandoned vehicles, non-permitted construction, and yards not being properly maintained	15%	34%	14%	12%	23%	2%
N	Protect the environment	17%	43%	13%	7%	19%	1%
O	Provide paths and trails for walking, jogging, and running	29%	49%	13%	5%	4%	0%
P	Provide bicycle lanes and paths	20%	41%	18%	9%	9%	2%
Q	Cleaning up litter and trash that people dump along streets, sidewalks and in public areas	21%	39%	23%	14%	3%	0%
R	Facilitate the creation of affordable housing	7%	0%	19%	23%	31%	17%

Section 4: Housing & Land Use						
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.					
	Randomize	Too Much	About Right	Too Little	Not sure	Prefer not to answer
A	Housing that is affordable for middle-income families	4%	20%	66%	9%	0%
B	Housing that is affordable for low-income families	8%	12%	64%	16%	1%
Q8	California State law requires that all cities plan for additional housing. With a general shortage of housing in California, the state is requiring that the City of San Mateo plan for thousands of new housing units. There are a variety of factors the City can consider when deciding *where* new housing may be located and the *types* of housing that may be built. As I read the following list of items, I'd like to know how important you feel the item should be as the City plans for future housing over the next 20 years. Please keep in mind that not all of the items can be extremely important. Here is the (first/next) item: _____. Should this City make this an extremely important, very important, somewhat important, or not important factor when planning future housing?					
	Randomize	Extremely Important	Very Important	Somewhat Important	Not Important	Not sure	Prefer not to answer
A	Creating homes that are affordable for low- and middle-income residents	45%	29%	17%	8%	1%	0%
B	Preserving open space and creating new park lands	43%	35%	19%	2%	1%	0%
C	Minimizing vehicle trips and traffic congestion	34%	41%	19%	4%	1%	0%
D	Ensuring sufficient parking spaces	28%	37%	26%	7%	1%	0%
E	Locating additional shops and restaurants near new housing units	17%	31%	37%	13%	2%	0%
F	Creating commercial zones that will attract high-paying jobs	13%	33%	35%	16%	2%	0%
G	Creating pedestrian-friendly areas that encourage people to walk rather than drive	40%	35%	18%	5%	1%	0%
H	Improving access to transit and increasing transit ridership	31%	38%	22%	7%	2%	0%
I	Creating bike lanes and paths	22%	31%	32%	13%	1%	1%

J	Minimizing pollution and greenhouse gas emissions	44%	34%	14%	6%	1%	0%
K	Preserving the City's historic buildings and resources	26%	32%	28%	13%	1%	0%
L	Keeping building heights low	21%	22%	25%	29%	3%	0%
M	Ensuring that the impacts of growth are not concentrated in disadvantaged areas	28%	31%	24%	11%	5%	1%
N	Producing the revenue necessary to pay for the cost of providing police, fire, and other city services to the new housing units	29%	43%	20%	4%	3%	1%
O	Ensuring adequate water supplies	62%	31%	5%	1%	2%	0%
P	Having a plan that will meet the State's requirements for at least the next 20 years	25%	40%	21%	9%	5%	1%
Q	Avoiding new development in areas that are at higher risk of natural hazards, climate change, or sea level rise	39%	35%	17%	6%	3%	0%
R	Minimizing the number of new units added to single-family neighborhoods	24%	21%	23%	27%	5%	0%

Q9	Concentrating new housing in taller, higher-density buildings downtown and near transit would allow more land to be reserved for parks, recreation areas, and community amenities, and will minimize change to existing residential neighborhoods. Knowing this, would you support or oppose concentrating future housing in higher-density buildings **up to 12 stories**. *Get answer, then ask:* Would that be strongly (support/oppose) or somewhat (support/oppose)?			
	1	Strongly support	33%	*Skip to Q11*
	2	Somewhat support	30%	*Ask Q10*
	3	Somewhat oppose	14%	*Ask Q10*
	4	Strongly oppose	21%	*Ask Q10*
	99	Prefer not to answer	2%	*Ask Q10*

Q10	Would you support or oppose concentrating future housing in higher-density buildings **up to 8 stories**. *Get answer, then ask:* Would that be strongly (support/oppose) or somewhat (support/oppose)?		
	1	Strongly support	16%
	2	Somewhat support	36%
	3	Somewhat oppose	20%
	4	Strongly oppose	27%
	99	Prefer not to answer	2%

Section 5: Mobility								
Q11	When traveling *within* the City of San Mateo, how often do you: _____? *Read options if needed: Five or more days per week, 1 to 4 days per week,….*							
	Read in Order	5+ days per week	1 to 4 days per **week**	2 to 3 days per **month**	1 day per **month**	Less than 1 day per **month**	Never	Prefer not to answer
A	Use a personal vehicle	52%	35%	8%	1%	1%	3%	0%
B	Use public transit such as a bus or train	3%	4%	5%	7%	22%	58%	1%
C	Use Uber, Lyft or taxi	1%	3%	12%	8%	33%	42%	1%
D	Walk from your home to a local store or restaurant	16%	29%	19%	9%	11%	15%	1%
E	Ride a bicycle or a scooter	6%	12%	9%	6%	15%	49%	2%

Q12	A growing population will naturally lead to greater traffic congestion in the future unless improvements are made to the City's transportation system *and* we find ways to reduce the number of trips people make by driving in a typical day. As I read the following list of actions that could be used to help reduce traffic congestion, please indicate whether you think the City should make it a high priority, a medium priority, or a low priority for the City's future. If you don't think the City should take the action, just say so. Please keep in mind that not all actions can be a high priority. Here is the (first/next) one: _____. Should this be a high, medium, or low priority for the City's future, or should the City not take this action?						
	Randomize	High priority	Medium priority	Low priority	Not a priority	Not Sure	Prefer not to answer
A	Increase programs that encourage carpooling, vanpooling, and **ridesharing**	16%	41%	24%	15%	4%	0%
B	Expand the network of dedicated bike lanes and shared lanes to encourage more **bicycling**	28%	35%	21%	13%	3%	0%
C	Improve sidewalks, crosswalks, pedestrian safety, signs, and infrastructure to encourage more **walking**	56%	28%	11%	4%	2%	0%
D	Improve **safe routes to school** to encourage more kids to walk and bike to school	52%	32%	9%	4%	3%	0%
E	Add **Bikeshare** services with bikes available at kiosks for public use	15%	35%	28%	18%	4%	0%
F	Improve **bus** and **shuttle** services with more routes and more frequent service within San Mateo and to neighboring areas	33%	38%	15%	8%	5%	0%
G	Provide financial **incentives** to encourage greater use of transit	27%	37%	21%	12%	3%	0%

H	Make infrastructure improvements needed to support **autonomous/driverless shuttles** and vehicles	19%	26%	25%	24%	6%	0%
I	Create **bus-only lanes** to improve travel times when using transit	13%	27%	26%	28%	6%	1%

Q13	Adding bike lanes and widening sidewalks will make it easier to travel around the City without using a car and could help reduce traffic congestion and greenhouse gas emissions. However, adding bike lanes and widening sidewalks could also require removing a vehicle lane or parking spaces in certain locations. Knowing this, do you generally support or oppose adding bike lanes and widening sidewalks in San Mateo? *Get answer, then ask:* Would that be strongly (support/oppose) or somewhat (support/oppose)?		
	1	Strongly support	30%
	2	Somewhat support	35%
	3	Somewhat oppose	16%
	4	Strongly oppose	17%
	99	Prefer not to answer	2%

Section 6: Communications			
Q14	Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means? *Get answer, then ask:* Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
	1	Very satisfied	18%
	2	Somewhat satisfied	44%
	3	Somewhat dissatisfied	17%
	4	Very dissatisfied	8%
	98	No Opinion/Not Sure	13%
	99	Prefer not to answer	0%

Q15	Is there a particular topic or issue that you'd like to receive more information about from the City?			
	1	Yes	30%	*Ask Q16*
	2	No	62%	*Skip to Q17*
	99	Prefer not to answer	8%	*Skip to Q17*

Q16	Please briefly describe the topic. Verbatim responses recorded and later grouped into categories shown below.		
	Commercial, housing developments, density		31%
	Affordable housing		13%
	Streets, roads, infrastructure maintenance		13%
	Environmental issues		8%
	Recreational programs		7%
	Public transportation		7%
	Public safety, crime stats		7%
	Community events		4%
	Schools, education		4%
	Traffic issues, updates		4%
	Parking issues, enforcement		4%
	City planning, vision		4%
	Noise control		3%
	COVID-19 mandates, tests, vaccines		3%
	Local economy, businesses		3%
	City budgeting, finances		2%
	Senior assistance		2%
	Homelessness		2%
Q17	What information sources do you use to find out about City of San Mateo news, events, and programs? *Don't read list. Record up to first 3 responses.*		
Newspapers			
	1	*San Francisco* ***Chronicle*** (daily newspaper)	12%
	2	***Mercury*** *News* (daily newspaper)	4%
	3	*San Mateo Daily* ***Journal*** *(*daily newspaper*)*	30%
	4	*Daily Post (*daily newspaper*)*	4%
	5	*Other newspaper*	3%
City Sources			
	6	City Website	15%
	7	Email notifications from City	30%
	8	Letters, postcards, flyers or brochures mailed from City to your home	24%
	9	Street banners or message signs	8%
	10	City Council Meetings	1%

Internet & Social Media			
	11	Internet (not City's site)	18%
	12	Facebook	12%
	13	Twitter	4%
	14	Instagram	5%
	15	Other social media site	2%
	16	Nextdoor.com	23%
	17	Blogs	0%
Other			
	18	Television (general)	11%
	19	Radio	3%
	20	HOA or neighborhood association	4%
	21	Friends/Family/Associates/word of mouth	14%
	22	Other	4%
	23	Do Not Receive Information about City	4%
	98	Not sure	2%
	99	Prefer not to answer	1%

Q18 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.

	Randomize	Very Effective	Somewhat Effective	Not Effective	Not Sure	Prefer not to answer
A	Email	50%	34%	11%	4%	1%
B	Postcards, letters and newsletters mailed to your home	39%	39%	18%	3%	1%
C	City's Website	27%	46%	19%	8%	1%
D	Advertisements in local papers	9%	31%	48%	10%	1%
E	Social media like Facebook, Twitter and Next Door	38%	40%	13%	7%	1%
F	Townhall meetings	11%	41%	36%	10%	1%
G	Television programs	11%	29%	48%	10%	1%

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 recoded into age groups shown below.			
	18 to 24		9%	
	25 to 34		23%	
	35 to 44		18%	
	45 to 54		15%	
	55 to 64		14%	
	65 or older		17%	
	Prefer not to answer		4%	
D2	What is your gender?			
	1	Male	48%	
	2	Female	46%	
	3	Non-binary	<1%	
	99	Prefer not to answer	6%	
D3	Do you have one or more children under the age of **18** living in your household?			
	1	Yes	29%	*Ask D4*
	2	No	67%	*Skip to D5*
	99	Prefer not to answer	4%	*Skip to D5*
D4	Do you have one or more children under the age of **six** living in your household?			
	1	Yes	41%	
	2	No	57%	
	99	Prefer not to answer	2%	
D5	Do you have one or more adults 65 years of age or older in your household?			
	1	Yes	29%	
	2	No	66%	
	99	Prefer not to answer	5%	

D6	Do you own or rent your residence in San Mateo?			
	1	Own	49%	
	2	Rent	46%	
	99	Prefer not to answer	5%	
D7	Which of the following best describes your current home?			
	1	Single family detached home	52%	
	2	Townhome	7%	
	3	Condominium	11%	
	4	Apartment	26%	
	99	Prefer not to answer	4%	
D8	How many more years do you anticipate that you will be living in the City of San Mateo?			
	1	Less than 5 years	21%	
	2	5 to 10 years	30%	
	3	11 to 15 years	9%	
	4	16 years or more	32%	
	99	Prefer not to answer	9%	
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	61%	*Ask D10*
	2	Employed part-time	6%	*Ask D10*
	3	Student	5%	*Skip to D12*
	4	Homemaker	1%	*Skip to D12*
	5	Retired	18%	*Skip to D12*
	6	In-between jobs	4%	*Skip to D12*
	99	Prefer not to answer	5%	*Skip to D12*
D10	Are you currently working from home, commuting to a workplace outside of your home, or a mixture of both?			
	1	Working from home	31%	*Ask D11*
	2	Commuting to a workplace outside home	35%	*Skip to D12*
	3	Mixture of both	34%	*Ask D11*
	99	Prefer not to answer	1%	*Skip to D12*

D11	How many days do you *primarily* work from home in a typical week?		
	0	Zero	1%
	1	One	4%
	2	Two	14%
	3	Three	17%
	4	Four	15%
	5	Five or more	47%
	99	Prefer not to answer	2%
D12	What ethnic group do you consider yourself a part of or feel closest to? *Read list if respondent hesitates.*		
	1	Caucasian/White	39%
	2	Asian -- Korean, Chinese, Vietnamese, Japanese, Filipino or other Asian	22%
	3	Indian (India)	2%
	4	Latino/Hispanic/Mexican	27%
	5	African-American/Black	2%
	6	Native American Indian or Alaskan Native	<1%
	7	Pacific Islander	1%
	8	Mixed Heritage	2%
	9	Other	1%
	99	Prefer not to answer	5%

Those are all of the questions that I have for you. Thanks so much for participating in this important survey! This survey was conducted for the City of San Mateo.

Post Interview Items			
S1	Survey Language		
	1	English	93%
	2	Spanish	7%