Fairbank,
Maslin,
Maullin,
Metz &
Associates
FM3

CITY OF BRISBANE COMMUNITY SURVEY
320-580-WT
N=580
MARGIN OF SAMPLING ERROR ±3.5% (95% CONFIDENCE INTERVAL)

The City of Brisbane is conducting a survey of its residents to better understand general community attitudes and particularly impressions of the Brisbane Baylands. A critical element of the planning process is collecting citizen views, thus your participation is very important. Thank you, in advance, for taking the time to respond to this survey.

The City has retained the independent public opinion research company of Fairbank, Maslin, Maullin, Metz & Associates (FM3) to administer the survey and evaluate the data. We want to assure you that your individual responses will be completely anonymous and confidential, and that no individual's survey responses will be transmitted to City officials or anyone else.

The first questions deal with general issues in the City of Brisbane.

1.   First, generally speaking, how would you rate the City of Brisbane as a place to live?

EXCELLENT/GOOD -------------------- 90%
Excellent ---------------------------------- 48%
Good -------------------------------------- 43%

Just average----------------------------------5%

POOR/EXTREMELY POOR ------------0%
Poor --0%
Extremely poor-------------------------------0%

DK/NA/Refused ----------------------------5%

2. Next, below is a list of general issues facing Brisbane. Please indicate how serious of an issue each is to you personally: extremely serious, very serious, somewhat serious, not too serious or not at all serious.

		EXT SER	VERY SER	SMWT SER	NOT TOO SER	NOT AT ALL SER	DK/NA /REF	*EXT/ VERY SER*	*TOTAL NOT SER*
a.	Climate change	27%	30%	19%	12%	11%	1%	*57%*	*23%*
b.	The quality of local schools	30%	28%	23%	12%	6%	2%	*58%*	*18%*
c.	Public transit	19%	32%	26%	17%	5%	1%	*50%*	*22%*
d.	Crime	24%	18%	21%	27%	8%	1%	*43%*	*36%*
e.	The cost of housing	28%	26%	31%	10%	4%	1%	*54%*	*14%*
f.	Jobs and the local economy	19%	30%	31%	15%	4%	1%	*49%*	*19%*
g.	Open space preservation and enhancement	30%	32%	20%	12%	5%	2%	*61%*	*16%*
h.	A lack of good places to go shopping	25%	21%	23%	19%	10%	1%	*47%*	*29%*
i.	The drought and reduced water supplies	42%	35%	14%	7%	1%	1%	*77%*	*8%*
j.	Traffic congestion	14%	24%	22%	23%	16%	1%	*39%*	*38%*

3.   Next, below is a list of issues facing Brisbane residents. For each one, please indicate how important it is to you personally that Brisbane City government do something to address that issue.

		EXT IMPT	VERY IMPT	SMWT IMPT	NOT TOO IMPT	NOT AT ALL IMPT	DK/NA /REF	EXT/ VERY IMPT	TOTAL NOT IMPT
a.	Parking on local streets	17%	23%	31%	21%	8%	1%	*40%*	*28%*
b.	Open space preservation and enhancement	33%	32%	20%	10%	4%	1%	*65%*	*14%*
c.	Replacing the old library	9%	16%	34%	28%	11%	1%	*25%*	*39%*
d.	Potholes and street repair	12%	34%	36%	14%	3%	1%	*46%*	*17%*
e.	Crime	28%	27%	24%	16%	4%	1%	*55%*	*20%*
f.	The future of the Brisbane Baylands	51%	26%	17%	4%	1%	1%	*77%*	*5%*
g.	Park maintenance	20%	46%	28%	4%	1%	1%	*66%*	*5%*
h.	Maintaining Brisbane's small town character	43%	26%	18%	9%	3%	1%	*69%*	*12%*
i.	Energy efficiency	32%	36%	23%	6%	2%	1%	*68%*	*8%*
j.	Providing more housing alternatives	13%	18%	35%	21%	11%	1%	*31%*	*33%*
k.	Recreational activities and programs	15%	33%	35%	14%	2%	1%	*48%*	*16%*
l.	Water conservation	39%	35%	19%	5%	1%	1%	*74%*	*6%*
m.	Short-term residential rentals, such as Airbnb	12%	13%	26%	25%	22%	2%	*25%*	*47%*
n.	Creating more retail shopping and dining options	24%	20%	25%	18%	11%	2%	*44%*	*29%*

4.   Next, please select the below statement that comes closest to your personal opinion:

         I worry that too much is changing too fast in Brisbane and
we're losing our small-town character --- 19%

         OR

         I feel that we're maintaining Brisbane's small-town
character even as we change and grow as a community ----------------------- 51%

         OR

         I feel that change is coming too slow to Brisbane and we
need to more quickly adapt to the future-------------------------------------- 26%

         DK/NA/Refused---4%

5.   Next, how would you describe the rate of development in Brisbane?

         TOO FAST -------------------------------- 22%
         Much too fast---------------------------------7%
         Somewhat too fast ------------------------ 14%

         About right-------------------------------- 39%

         TOO SLOW ------------------------------ 38%
         Somewhat too slow----------------------- 23%
         Much too slow --------------------------- 14%

         DK/NA/Refused ----------------------------2%

The next questions deal specifically with the Brisbane Baylands.

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6.   First, how familiar would you say you are with the Baylands portion of Brisbane?

         EXT/VERY FAMILIAR---------------- 39%
         Extremely familiar ----------------------- 14%
         Very familiar ----------------------------- 24%

         Somewhat familiar------------------------ 38%

         TOTAL NOT FAMILIAR ------------- 21%
         Not too familiar -------------------------- 17%
         Not at all familiar----------------------------5%

         DK/NA/Refused ----------------------------2%

7.   Next, prior to receiving this survey or hearing anything about this survey, had you heard, read or seen anything about plans to do something with the Baylands?

> Yes, I have heard, read or seen a great deal -------------------- 39%
> Yes, I have heard, read or seen a little-------------------------- 50%
> No, I have not heard, read or seen anything **(SKIP TO Q9)** ---9%
> DK/NA/Refused --2%

(IF "YES" IN Q7, PLEASE ANSWER Q8, *N=518*)

8.   In a few words of your own, what have you heard, seen or read about plans to do something with the Baylands?

> Mixed-use; retail/housing-- 25%
> Green/open space/parks-- 15%
> Just heard that there is a development plan for Baylands -------------------------------- 14%
> Attended meetings/read development plan/read EIR/participated in EIR process ---- 12%
> Housing units being built/developer pushing housing ---------------------------------- 11%
> Toxic site/needs clean-up -- 11%
> Businesses/shopping --9%
> Solar/wind power/alternative energy considerations-----------------------------------7%
> Received mailings/pamphlets --4%
> Debate/question on best use of space/many different options/has not been decided ---3%
> Free tours/took a tour sponsored by Paragon ---3%
> TV news/newspapers --2%
> Build a new high school--2%
> Phone survey/focus group --1%
> Online/city website --0%
>
> Other --2%
> DK/NA---6%
> Refused -- 12%

(RESUME ASKING ALL RESPONDENTS)

9.   Next, how important do you feel future development of the Baylands is to the <u>City of Brisbane</u>?

> **EXT/VERY IMPORTANT ------------ 68%**
> Extremely important ---------------------- 44%
> Very important ----------------------------- 24%
>
> Somewhat important ---------------------- 18%
>
> **TOTAL NOT IMPORTANT ---------- 11%**
> Not too important --------------------------7%
> Not at all important ------------------------3%
>
> DK/NA/Refused -----------------------------3%

10.   Next, how important do you feel future development of the Baylands is to <u>you personally</u>?

> **EXT/VERY IMPORTANT ------------ 53%**
> Extremely important ---------------------- 27%
> Very important ----------------------------- 26%
>
> Somewhat important ---------------------- 26%
>
> **TOTAL NOT IMPORTANT ---------- 18%**
> Not too important ------------------------ 13%
> Not at all important ------------------------6%
>
> DK/NA/Refused -----------------------------3%

The next questions deal with some potential land use plans for the Baylands. However, before getting to those questions, below is some background information about the area, including a map.

The Baylands as defined by the City's General Plan is a 660 acre area bordered on the west by Bayshore Blvd, on the North by the City and County of San Francisco, on the east by the U.S. 101 causeway, and on the south by the Southern end of the Lagoon. The property is primarily owned by Universal Paragon Corporation (UPC), though other owners, including Golden State Lumber and Recology, own smaller portions.

As part of an ongoing process assessing future plans for the Baylands (a process that started nine years ago), the City is currently reviewing and considering two specific documents:

- *A Specific Plan application from UPC that includes a development proposal for that part of the Baylands owned by UPC.*
- *An Environmental Impact Report (EIR) that has studied the environmental impacts of the UPC proposal, as well as several other land use alternatives.*

The portions of the Baylands under consideration for development include a former municipal landfill to the east of the Caltrain rail line and a former rail yard to the west of the rail line. By law, any future land use in the Baylands will have to comply with federal and state regulations, including those requiring remediation of contamination to standards deemed appropriate for the planned land uses. Any proposed land use plan for the Baylands cannot be approved unless it is consistent with Brisbane's General Plan. Because Brisbane's General Plan does not allow housing on the Baylands, the General Plan would need to be amended to permit any Baylands development to include housing.

Two major portions of the Baylands are <u>not</u> included in UPC's development proposal:

- *The Kinder Morgan Tank Farm*
- *The Recology Solid Waste Transfer Facility that is situated partially within Brisbane and partially within San Francisco. (A separate Specific Plan and EIR will be reviewed and considered by the City for the proposal to expand the Recology facility.)*

In addition to citizen opinions collected by this survey and other outreach efforts, the current City Council has indicated voters will have an opportunity to express their views at an election before any final Baylands development plan is approved.

[Include map]

11. Next, below is a list of goals for any future development of the Baylands. For each one, please indicate how important each goal is to you personally.

		EXT IMPT	VERY IMPT	SMWT IMPT	NOT TOO IMPT	NOT AT ALL IMPT	DK/NA /REF	*EXT/ VERY IMPT*	*TOTAL NOT IMPT*
a.	Creating local jobs	14%	31%	31%	15%	7%	2%	*45%*	*22%*
b.	Containing and remediating contaminants	61%	25%	7%	3%	2%	1%	*86%*	*5%*
c.	Preserving historic buildings	24%	26%	26%	15%	7%	2%	*50%*	*22%*
d.	Ensuring all new development and buildings are as energy efficient as possible	42%	32%	18%	4%	2%	2%	*74%*	*6%*
e.	Minimizing traffic impacts	52%	28%	15%	2%	1%	2%	*80%*	*3%*
f.	Generating new revenue for City services, such as public safety, parks, and street maintenance	34%	33%	23%	5%	3%	2%	*67%*	*8%*
g.	Generating renewable energy for all of Brisbane	38%	29%	19%	7%	5%	2%	*67%*	*12%*
h.	Preserving scenic views	52%	27%	14%	4%	2%	2%	*79%*	*6%*
i.	Protecting air quality	61%	27%	7%	2%	1%	2%	*89%*	*3%*
j.	Opening new retail establishments, local shopping, and dining	25%	21%	27%	13%	12%	2%	*46%*	*26%*
k.	Ensuring that any new development can generate enough renewable energy to meet its needs	34%	31%	19%	9%	4%	2%	*66%*	*13%*
l.	Preserving and expanding open space and wildlife habitat	46%	28%	14%	8%	2%	2%	*74%*	*10%*
m.	Protecting taxpayers	47%	31%	15%	3%	2%	4%	*77%*	*4%*
n.	Protecting water quality in local streams, creeks and wetlands	65%	24%	7%	2%	1%	2%	*88%*	*3%*
o.	Generating enough development revenue to pay for any necessary infrastructure improvements and remediation	45%	30%	15%	5%	3%	3%	*75%*	*7%*
p.	Connecting residential Brisbane to the Baylands	17%	25%	27%	18%	10%	2%	*42%*	*28%*
q.	Improving the visual appeal of the area	36%	28%	22%	8%	4%	2%	*65%*	*12%*
r.	Providing housing that working families can afford	20%	23%	25%	14%	14%	3%	*43%*	*29%*
s.	Enhancing recreation opportunities	22%	32%	27%	13%	4%	2%	*53%*	*17%*

	EXT IMPT	VERY IMPT	SMWT IMPT	NOT TOO IMPT	NOT AT ALL IMPT	DK/NA /REF	*EXT/ VERY IMPT*	*TOTAL NOT IMPT*
t. Minimizing landfill waste generated on an ongoing basis	41%	31%	19%	4%	2%	2%	*72%*	*6%*
u. Utilizing recycled and reclaimed water to reduce water supply needs	45%	30%	16%	4%	2%	3%	*75%*	*7%*

12. Are there any other goals that you find personally important that were not listed above?

No --- 9%
Preserve open/green space --- 4%
Provide more recreation opportunities around lagoon/more outdoor activities --- 4%
Expand/improve public/alternative transit/roads --- 4%
Keep developments true to Brisbane character/ preserve small-town feel/exclusive reputation --- 4%
Build a high school/improve public school --- 3%
No new housing/no affordable housing --- 3%
Minimize traffic/parking impacts/increase enforcement --- 2%
Create development that produces cash flow --- 2%
Ensure crime does not increase/police services --- 2%
Keep big-business/retail/chain restaurants out --- 2%
Clean up toxic areas/don't build on toxic areas --- 2%
Have more shopping/restaurants/theaters --- 2%
Ensure no extra costs to residents for public services/ infrastructure improvements/reduce water/sewage bills --- 2%
Prevent light/noise pollution --- 1%
Develop renewable energy; solar/wind --- 1%
Become part of biotech/research corridor/light industrial/manufacturing use --- 1%
Keep buildings small/don't block views --- 1%
Provide more quality/affordable housing/rent control --- 1%
Preserve railroad roundhouse --- 1%
Sustainable mixed-use development/"smart-growth" --- 1%
Don't develop/don't continue with plan --- 1%
Protect environment/wildlife habitats/natural beauty/save water/air pollution --- 1%
Set example for best of modern living design/showcase Brisbane as model for smart growth/become world-class destination --- 1%
Prevent Recology/landfill from expanding; keep out of Brisbane --- 0%
Art/cultural sites; museums/music/history --- 0%
Fostering community --- 0%
Reduce taxes --- 0%

Other --- 3%
DK/NA --- 1%
Refused --- 53%

13.   Next, below is a list of different land uses and projects that could be a part of any future Baylands development. Please indicate whether you would strongly support, somewhat support, somewhat oppose or strongly oppose each potential land use or project.

		STR SUPP	SMWT SUPP	SMWT OPP	STR OPP	DK/NA /REF	*TOTAL SUPP*	*TOTAL OPP*
a.	Expanding the Recology facility	13%	36%	28%	19%	4%	*49%*	*47%*
b.	Building multi-unit residential housing	11%	31%	23%	32%	3%	*42%*	*55%*
c.	Preserving open space and wetlands	61%	29%	5%	3%	2%	*90%*	*8%*
d.	Building a hotel and conference center	14%	30%	28%	25%	3%	*44%*	*53%*
e.	Building facilities for technical and industrial research and development	21%	43%	20%	14%	3%	*64%*	*34%*
f.	Building a new public charter high school	27%	34%	18%	17%	4%	*62%*	*35%*
g.	Building renewable energy generation facilities (e.g., solar, wind, biomass conversion)	41%	37%	12%	7%	2%	*79%*	*19%*
h.	Building office space	14%	43%	24%	16%	3%	*57%*	*40%*
i.	Building space for retail establishments	32%	36%	16%	13%	3%	*68%*	*29%*
j.	Expanding bike lanes and trails	51%	33%	9%	5%	2%	*84%*	*14%*
k.	Building new parks	48%	36%	10%	3%	3%	*84%*	*13%*
l.	Building a transit hub for trains, busses and other kinds of transportation	37%	37%	13%	10%	3%	*74%*	*23%*
m.	Building recreational facilities and areas	35%	46%	12%	4%	3%	*81%*	*16%*
n.	Providing space for warehouses and light product assembly	10%	31%	35%	21%	3%	*41%*	*56%*
o.	Providing space for entertainment venues (e.g., theaters, sports arenas, soccer fields, etc.)	24%	34%	20%	20%	3%	*57%*	*39%*

14.   The City of Brisbane currently has approximately 2,000 residential housing units within its boundaries and the UPC proposal includes building 4,400 new housing units in the Baylands. Because Brisbane's current General Plan does not allow housing on the Baylands, the General Plan would need to be amended for any housing to be included in an approved land use plan. Given this, how many housing units do you feel is appropriate to include in any future Baylands development?

Zero ------------------------------------(ASK Q15) 43%
1-500 ------------------------------- (GO TO Q16) 15%
501-1,000 ------------------------ (GO TO Q16) 13%
1,001-2,000---------------------- (GO TO Q16) 10%
2,001-3,000----------------------- (GO TO Q16) 6%
3,001-4,000----------------------- (GO TO Q16) 3%
4,001-5,000----------------------- (GO TO Q16) 2%
5,001 or more -------------------- (GO TO Q16) 1%
DK/NA/Refused ------------------------------------6%

(ANSWER Q15 IF YOU ANSWERED "ZERO, CODE 1 NO ADDITIONAL HOUSING UNITS" IN Q14, *N=250*)

15.   Please select the top two reasons why you do not want to see any additional housing units included in future Baylands development.

	1ST REASON	2ND REASON
Brisbane's character and small town feel will change	26%	14%
Increased traffic congestion	12%	24%
The Baylands will never be safe for residential housing because of soil contamination	30%	7%
I'd rather see the lands used exclusively for other purposes	15%	24%
Housing development in the Baylands is currently prohibited by the City's General Plan	5%	10%
The number of new voters could have more influence in local elections than current, long-term residents	2%	11%
DK/NA/Refused	10%	11%

(ANSWER Q16 IF YOU ANSWERED SOME AMOUNT GREATER THAN ZERO IN Q14, *N=294*)

16.   Please select the top two reasons why you would support including additional housing units in future Baylands development.

	1ST REASON	2ND REASON
The Bay Area has a housing shortage	21%	14%
Some of the land in the Baylands can be made safe for residential use	6%	12%
It could result in more housing the working families can afford	22%	17%
New housing should be located next to transit and new jobs	18%	17%
Brisbane can accommodate the population increase	9%	8%
It will increase demand for retail, shopping, and dining	16%	25%
DK/NA/Refused	8%	8%

(ALL RESPONDENTS)

17. The following section contains several pairs of statements. For each pair, please indicate which statement comes closer to your own personal opinion. Please choose one, even if it is difficult to decide.

a.   I feel that Brisbane would be better off if portions of the Baylands were developed, if doing so could finance a variety community amenities, such as parks, trails and public art ----------------------------------- 71%

           OR

           I feel that Brisbane would be better off if none of the Baylands were developed, even if that means no additional funding for community amenities, such as parks, trails and public art---------------------- 25%

           DK/NA/Refused--4%

b.   I am comfortable changing Brisbane's General Plan in order to accommodate specific types of development such as housing on the Baylands --- 43%

           OR

           I would prefer that any new development on the Baylands work within the limits set in Brisbane's General Plan and oppose changing it--- 51%

           DK/NA/Refused--7%

c.   I feel the best way to deal with existing contamination in the Baylands is to take some of the funds generated by development and put them towards containment and remediation ----------------------------- 66%

           OR

           I feel the best way to deal with existing contamination in the Baylands is to leave it relatively untouched and leave the contaminants where they are --- 25%

           DK/NA/Refused--- 10%

d.   I think Brisbane <u>should not</u> proactively work with potential
          developers of the Baylands and the City should instead simply
          review and either approve or reject any proposals submitted to
          them --- 16%

          OR

          I think Brisbane <u>should</u> proactively work with potential developers
          of the Baylands to ensure that future plans reflect the values of our
          community -- 78%

          DK/NA/Refused---6%

18.   Next, in a few words of your own, what would you tell a friend, neighbor or coworker should be
       done with the Baylands?

       Retail/businesses/markets--- 22%
       Park/nature reserve/open space/preserve wildlife habitats-------------------------------- 21%
       Housing --- 16%
       Renewable energy/solar farm --- 10%
       Walking/bike trails/recreation --9%
       Clean up toxic areas --8%
       Sustainable/reasonable/smart developments/do what Brisbane citizens want-----------7%
       No housing ---5%
       Attract income-producing development --5%
       Transit hub/improve public transit--5%
       Nothing/leave it alone ---4%
       Combination of preserving natural areas & creating new developments -----------------4%
       Light industry/science/tech/office space --4%
       Minimal/small-scale development--3%
       Just need to develop it/do something ---3%
       Preserve/enhance/create beauty ---2%
       Should create community/job growth--2%
       Education/high school---2%
       Preserve wetlands/lagoon---2%
       Golf course---1%
       No shopping/retail ---1%
       Never allow living/work spaces on toxic area ---1%
       Low traffic impact ---1%
       Keep buildings low/don't block views---1%

       Other ---4%
       DK/NA---1%
       Refused --- 28%

> *The next questions are for classification purposes to ensure that the survey is reaching a representative sample of Brisbane residents.*

19.   First, about how long have you lived in Brisbane?

Five years or less -------------------------- 20%
Six to ten years----------------------------- 12%
11 to 20 years ----------------------------- 29%
21 to 30 years ----------------------------- 19%
31 to 40 years ----------------------------- 13%
41 years or more----------------------------6%
DK/NA/Refused ----------------------------2%

20.   Next, below is a list of different ways you may have interacted with Brisbane City government. Please indicate whether you have done each <u>during the past year</u>.

	YES	**NO**	**DK/NA/REF**
a. Attended a public city meeting (e.g., City Council meeting, City commission meeting, City community workshops, etc.)	49%	48%	3%
b. Watched a City meeting or presentation on Channel 27 or online on a computer	49%	48%	3%
c. Written a letter or email to the City or City Council	30%	65%	4%
d. Met with a City employee or City Council member	56%	39%	4%
e. Read about City matters in the City News and Star, or Chamber of Commerce Luminary	91%	5%	3%

21.   With which racial or ethnic group do you identify yourself?

African American or Black ----------------1%
Asian or Pacific Islander ----------------- 11%
White or Caucasian----------------------- 59%
Filipino ----------------------------------4%
Latino or Hispanic------------------------ 10%
Native American or Indian----------------1%
Some other ethnic or racial backround---4%
Mixed ethnic or racial background -------3%
DK/NA/Refused ----------------------------7%

22.   What was the last level of school you completed?

Grades 1-8 ----------------------------------0%
Grades 9-11----------------------------------0%
High school graduate(12) ---------------- 18%
Some college/vocational school -----------4%
College (4 years)------------------------- 39%
Post-graduate work ---------------------- 34%
DK/NA/Refused ----------------------------4%

23.   What was the total combined income for all the people in your household before taxes in 2014?

$30,000 and under--------------------------3%
$30,001 - $60,000--------------------------8%
$60,001 - $75,000--------------------------9%
$75,001 - $100,000 --------------------- 12%
$100,001 - $150,000--------------------- 19%
$150,001 - $200,000--------------------- 16%
More than $200,000--------------------- 22%
DK/NA/Refused ------------------------- 11%

24.   What is your gender?

Male------------------------------------- 46%
Female----------------------------------- 46%
Refused -----------------------------------8%

THANK AND TERMINATE

PARTY REGISTRATION:

Democrat----------------------------------- 54%
Republican -------------------------------- 13%
No Party Preference---------------------- 28%
Other --------------------------------------5%

FLAGS

P10--------------------------------- 51%
G10 -------------------------------- 75%
P12--------------------------------- 55%
G12 -------------------------------- 86%
P14--------------------------------- 46%
G14 -------------------------------- 76%
BLANK ----------------------------6%

PERMANENT ABSENTEE

Yes--------------------------------- 53%
No---------------------------------- 47%

AGE

18-29 --------------------------------8%
30-39 ----------------------------- 16%
40-49 ----------------------------- 20%
50-64 ----------------------------- 34%
65-74 ----------------------------- 17%
75+ ----------------------------------5%
BLANK ----------------------------0%

HOUSEHOLD PARTY TYPE

Dem 1 ----------------------------- 34%
Dem 2+ --------------------------- 14%
Rep 1 ---------------------------------6%
Rep 2+ ----------------------------2%
Ind 1+ ---------------------------- 27%
Mix ------------------------------- 17%

SURVEY MODE

Mail-------------------------------- 82%
Online ----------------------------- 18%