



## City Council Agenda Item Staff Report

CITY OF SAN BRUNO

**DATE:** January 27, 2026  
**TO:** Honorable Mayor and Members of the City Council  
**FROM:** Alex D. McIntyre, City Manager  
**PREPARED BY:** Brian Adam, Assistant to the City Manager  
**SUBJECT:** Receive 2025 Downtown Pulse Survey Results

### BACKGROUND:

During its September 9 meeting, the City Council agreed to establish an ad hoc subcommittee tasked with exploring ways to enhance downtown engagement. To that end, the subcommittee drafted a survey of shoppers, business owners, and property owners. The draft survey was reviewed by staff.

Subsequently, the City conducted a *Downtown Pulse Survey* from December 10 to 31, 2025 to better understand how residents and visitors shop, dine, and spend time in San Bruno, with a particular focus on San Mateo Avenue (“The Avenue”) and other major commercial areas (Bayhill, Town Center, and Tanforan). Special attention was given to San Mateo Avenue because of the City’s focus on enhancing the area as a meeting place and business street (e.g. new street banners, newspaper racks, wastebins, community events, and other capital improvements).

For comparison, the amount of Sales Tax Revenue generated by businesses operating in the San Mateo Avenue area (including immediately adjacent businesses at cross streets) versus other shopping areas is summarized below in Figure 1.

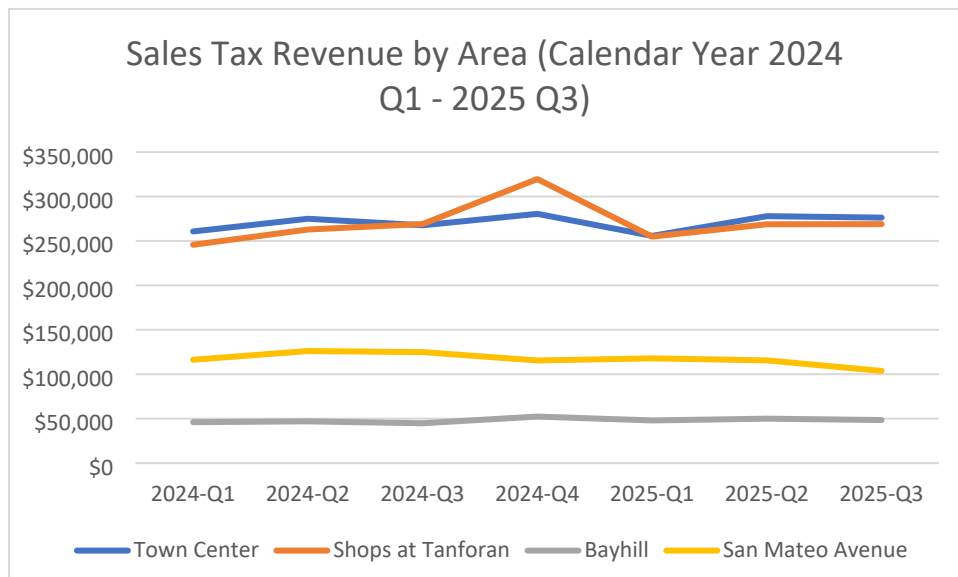


Figure 1, "Sales Tax Revenue from San Bruno Shopping Areas"

Area	Number of businesses	2024 Total	2025 Est.	Percent change
Town Center	51	\$1,083,774	\$1,090,330	1%
Shops at Tanforan	78	\$1,097,262	\$1,112,217	1%
Bayhill	25	\$190,197	\$198,771	5%
San Mateo Avenue	100	\$482,731	\$452,662	-6%

Figure 2, "Sales Tax Revenue Totals, calendar year 2024 – 2025"

Area	2024 avg. per business	2025 avg. per business
Town Center	\$21,250	\$21,379
Shops at Tanforan	\$14,067	\$14,259
Bayhill	\$7,608	\$7,951
San Mateo Avenue	\$4,827	\$4,527

Figure 3, "Sales Tax Revenue generated on average per business, calendar year 2024 – 2025"

The City investments and operating expenditures from Fiscal Year 2020-21 (FY21) to present related to San Mateo Avenue (except the Downtown Parking Program) are summarized below in Figure 4.

Item	Category	Est. Cost (FY21 to present)
1st Thursdays	Downtown Activation	\$17,000
Banners (equipment)	Beautification	\$5,213
Banners (labor)	Beautification	\$19,218
Centennial Plaza Cleaning	Cleaning/Maintenance	\$12,000
Centennial Plaza Revamp	Beautification	\$1,558,477
Downtown beautification project	Beautification	\$648,507
Downtown cleaning (equipment)	Cleaning/Maintenance	\$145,738
Downtown cleaning (labor)	Cleaning/Maintenance	\$86,122
Downtown Weed Abatement	Cleaning/Maintenance	\$2,000
Holiday Tree and Lighting	Downtown Activation	\$40,000
Posy Park Cleaning	Cleaning/Maintenance	\$6,000
Posy Park Improvements	Beautification	\$835,000
Sidewalk pressure washing contract	Cleaning/Maintenance	\$581,000
Streetlight repairs	Cleaning/Maintenance	\$5,000
<b>TOTAL</b>		<b>\$3,961,277</b>

Highlighted rows: these costs are projected for when the projects are complete

Figure 4, "Investments and Costs in San Mateo Avenue, FY21 – present"

Survey Methodology

The survey was administered online over the course of several weeks and disseminated via flyers, social media posts, and newsletters. It collected both quantitative responses (ranked preferences and likelihood questions) and qualitative open-ended comments. The intent of the survey was to identify perceived barriers to downtown visitation, understand what amenities residents value most, and inform future policy discussions related to the downtown area.

A total of 294 respondents completed the survey, with close to 100 respondents providing open-ended written feedback. Of these, 3 respondents property owners and 13 were business owner. 63% of respondents were women, and the age breakdown of respondents are included below in Figure 5.

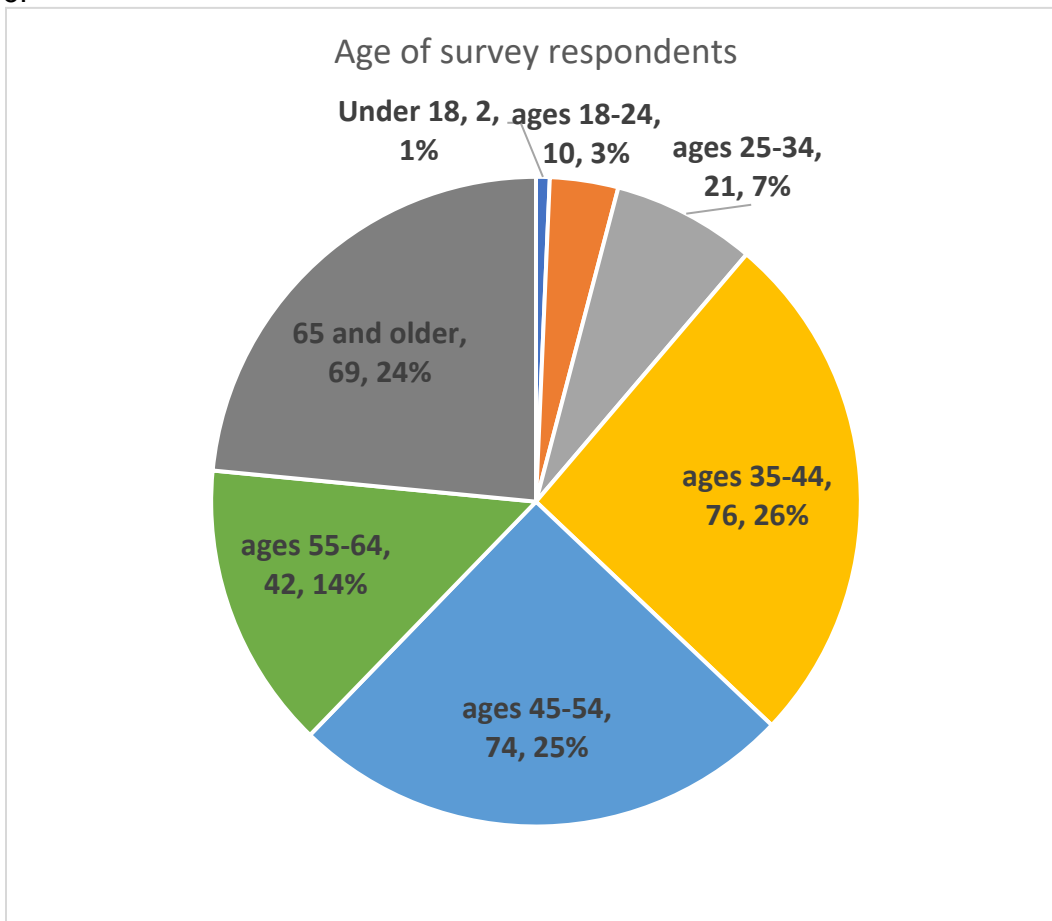


Figure 5, "Age of survey respondents"

**DISCUSSION:**

**Overall Shopping Preferences**

When asked to rank where they most often shop or dine, respondents most frequently selected shopping areas outside of San Bruno as their first choice, followed by Bayhill. San Mateo Avenue ranked lower as a primary destination; however, it appeared frequently as a second or third option. This data is shown below in Figure 6.

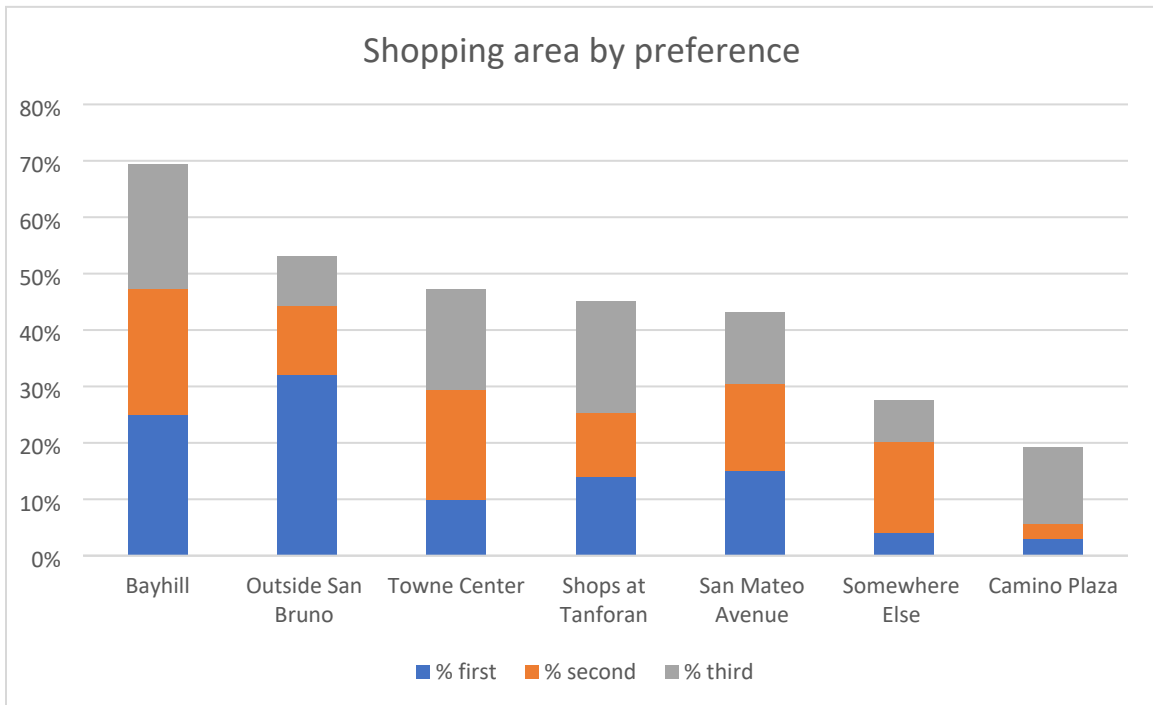


Figure 6, "Shopping area by preference."

The following are the percentage of first choice selections for each area:

- Somewhere outside San Bruno: 97 (≈33%)
- Bayhill: 75 (≈25%)
- San Mateo Ave ("The Avenue"): 42 (≈14%)
- Shops at Tanforan: 39 (≈13%)
- Towne Center: 30 (≈10%)
- Somewhere else inside San Bruno, e.g. Camino Plaza: 13 (≈4%)

### Summary of Quantitative Results

In this section, respondents were asked to rate their agreement with various statements about their preferred shopping area. Survey results indicate that residents place the highest importance on:

- High-quality restaurants and cafés (57%)
- Variety of dining options (57%)
- Attractive aesthetics (lighting, landscaping, cleanliness) (49%)

Proximity to public transit ranked significantly lower in importance for most respondents when choosing where to shop or dine.

Respondents were then asked what would make them more likely to visit downtown San Bruno, and the strongest responses were:

- Cleaner / more attractive shopping area
- More high-quality restaurants and cafés
- More retail options, including “anchor” or destination businesses
- More community activities and events

Figure 7 shows the ranking for which items respondents considered most important for improving San Mateo Avenue.

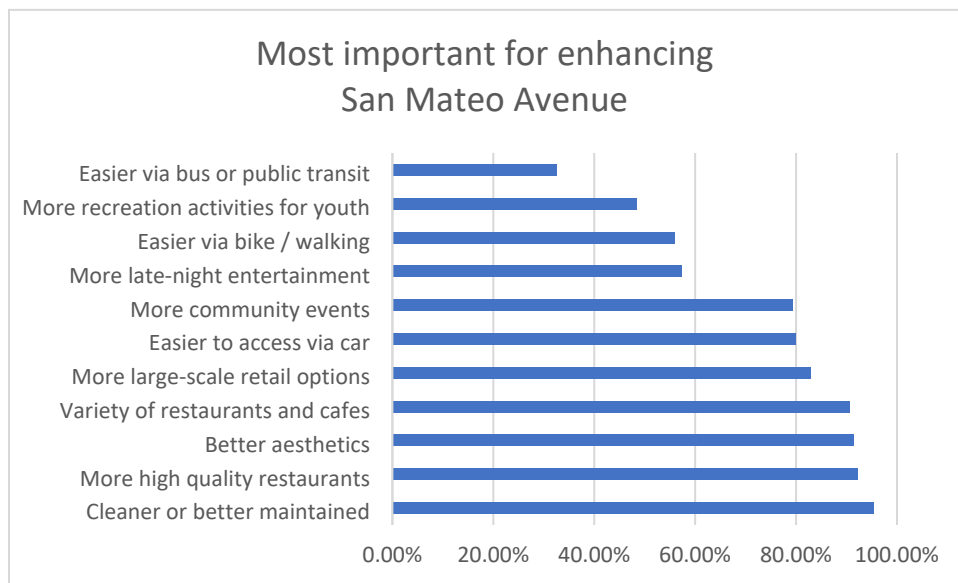


Figure 7, “Most important for enhancing San Mateo Avenue”

### Summary of Open-Ended Feedback

Of the 294 respondents, 209 did not provide a response to the free response section. Staff reviewed and categorized all the remaining open-ended responses (n = 85) by primary themes, summarized below in Figure 8.

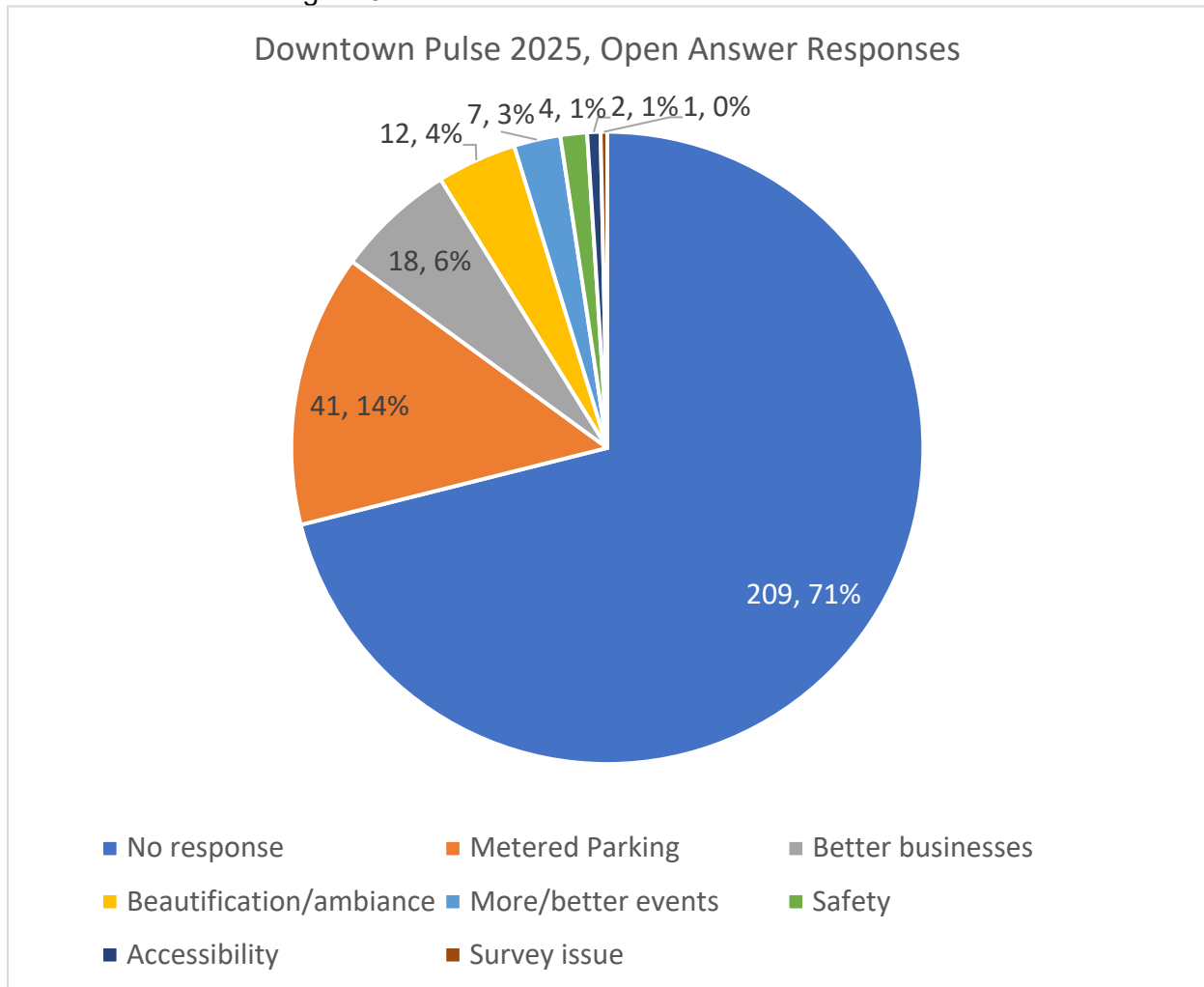


Figure 8, "Downtown Pulse 2025, Open Answer Responses"

#### 1. Paid parking is a deterrent

A majority of written comments cite the paid parking program as the primary reason respondents avoid San Mateo Avenue. Concerns include:

- Complexity and reliability of kiosks
- Limited time increments (e.g., paying for one hour for a 15 - 20-minute visit)
- Paid parking on evenings, Sundays, and holidays
- Perceived lack of grace periods and aggressive enforcement

Respondents stated they intentionally choose nearby cities with simpler or free parking.

**2. Business mix and vacancies**

Respondents frequently noted a lack of compelling reasons to visit downtown due to:

- Vacant storefronts
- A concentration of service-oriented businesses rather than retail
- Desire for higher-quality restaurants, cafés, bakeries, and neighborhood-serving retail
- Interest in grocery anchors (e.g., Trader Joe’s, Sprouts, Whole Foods), while opinions varied on large, big-box stores

**3. Curb Appeal, cleanliness, and streetscape**

Numerous comments described downtown as:

- Visually outdated or run down
- Lacking trees, shade, and greenery
- Poorly lit at night
- In need of facade improvements and sidewalk maintenance

Comparisons were frequently made to downtowns in Burlingame, San Mateo, Millbrae, and Redwood City.

**4. Activation and community life**

Respondents expressed strong support for:

- Farmers markets
- Street fairs and festivals
- Music and family-friendly events

Many noted that events are positive but insufficient on their own without addressing parking and aesthetics.

**5. Safety and comfort**

A subset of respondents raised concerns about:

- Feeling unsafe at night
- Poor lighting
- Cleanliness and loitering

These concerns were often linked to reluctance to bring children or teenagers downtown or to stay after dark.

**Summary**

- The survey was not conducted in statistically valid manor and responses should be viewed as valuable information and feedback.
- Business quality and visual appeal were the most important factors in why respondents chose their shopping areas and what would bring them to San Mateo Avenue.
  - The City has invested in a range of items to support beautification of the Avenue and is actively considering more investment.
- Respondents expressed significant desire for additional events.
  - Staff have been actively partnering with the San Bruno Improvement Group on First Thursdays.
  - Staff will raise awareness of spaces that can be rented for events, e.g. Centennial Plaza.
- Concerns with parking were raised by a significant number of respondents
  - Staff will communicate updates made to the program in 2025 to address existing
- Business operator and property owner respondents reported high levels of dissatisfaction in their ability to work with the City and City policy supporting them.

**FISCAL IMPACT:**

There is no cost related to Council reviewing or accepting this item.

**ENVIRONMENTAL IMPACT:**

The action is not a project subject to CEQA. City Council’s action is not considered a “Project” per CEQA Guidelines and therefore no further environmental analysis is required.

**RECOMMENDATION:**

Receive the 2025 Downtown Pulse Survey results.

**ALTERNATIVES:**

Not applicable.

**ATTACHMENTS:**

1. 2025 Downtown Pulse Survey (question list)
2. [2025 Downtown Pulse Survey data](https://SanBruno.ca.gov/Survey) (SanBruno.ca.gov/Survey)