

Community Survey Report

City of San Marcos Housing Element Update

OCTOBER 2020

In partnership with De Novo Planning Group

Contents

Introduction	3
Executive Summary	4
Survey #1: Respondent Demographics.....	5
Survey #1 Responses	7
Values and Priorities	7
Housing Affordability	8
Housing Maintenance	10
Housing Fit	11
Survey Responses #2	15
Survey Responses #3	16
Appendix A: Survey #1.....	18
Appendix B: Summary of Survey #1 Responses	18
Appendix C: Summary of Survey #1 Responses by Group	18
Survey Responses by Homeownership Status.....	18
Survey Responses by Age.....	18
Survey Responses by Household Type.....	18
Appendix D: Survey #2.....	18
Appendix E: Summary of Survey #2 Responses.....	18
Appendix F: Survey #3	18
Appendix G: Summary of Survey #3 Responses.....	18

Figures

Figure 1	6
Figure 2	7
Figure 3	9
Figure 4	10
Figure 5	11
Figure 6	13
Figure 7	14
Figure 8	15

Introduction

The City of San Marcos is updating its Housing Element as part of the 2021-2029 Housing Element Cycle (Cycle 6). San Marcos is dedicated to meeting the future housing needs of its residents. The Housing Element Update process is a unique opportunity to connect with residents of San Marcos and learn more about residents' values, priorities, concerns, and ideas.

As part of the community outreach, a virtual community workshop was conducted and a series of three surveys were presented. The three separate surveys work together to gather information on housing-related issues. Survey #1 focused on issues of home maintenance, affordability, home types, and living conditions in San Marcos as well as demographic questions. Survey #2 focused on community priorities related to housing. While Survey #3 looked at potential locations for future housing growth. This report is a summary of the responses received and the general themes that emerged.

All three surveys were conducted in both English and Spanish. They were posted to the website on August 10, 2020 and were open for over a month. The surveys were closed on September 30, 2020.

Survey #1 was 14 questions long. It had a 94% completion rate and 124 total responses.

Survey #2 was 2 questions long. It had an 87% completion rate and 69 total responses.

Survey #3 was 2 questions long. It had a 100% completion rate and 53 total responses.

Executive Summary

The survey results from Survey #1 showed that 85% of respondents own their own home, and only 12% of respondents rent. This demographic difference influences how respondents answered questions; the survey results show that the experience for homeowners is different than the experience for renters.

HOMEOWNERS

What made you decide to live here?



Affordability (54%)

How satisfied are you with your current housing situation?



I am very satisfied (67%)
I am somewhat satisfied (20%)
I am somewhat dissatisfied (11%)
I am dissatisfied (2%)

How would you rate the physical condition of residence you live in?



Excellent condition (60%)
Shows signs of minor deferred maintenance (32%)
Needs one or more modest rehabilitation improvements (5%)
Needs one or more major upgrades (2%)
Other (1%)

RENTERS

What made you decide to live here?



Proximity to job/work (69%)

How satisfied are you with your current housing situation?



I am very satisfied (7%)
I am somewhat satisfied (47%)
I am somewhat dissatisfied (33%)
I am dissatisfied (13%)

How would you rate the physical condition of residence you live in?



Excellent condition (27%)
Shows signs of minor deferred maintenance (47%)
Needs one or more modest rehabilitation improvements (20%)
Needs one or more major upgrades (6%)
Other (0%)

THINGS MOST RESIDENTS HAD IN COMMON:



They care about quality schools (53%)



Many respondents have children under age 18 (44%)



They care about neighborhood safety (48%)

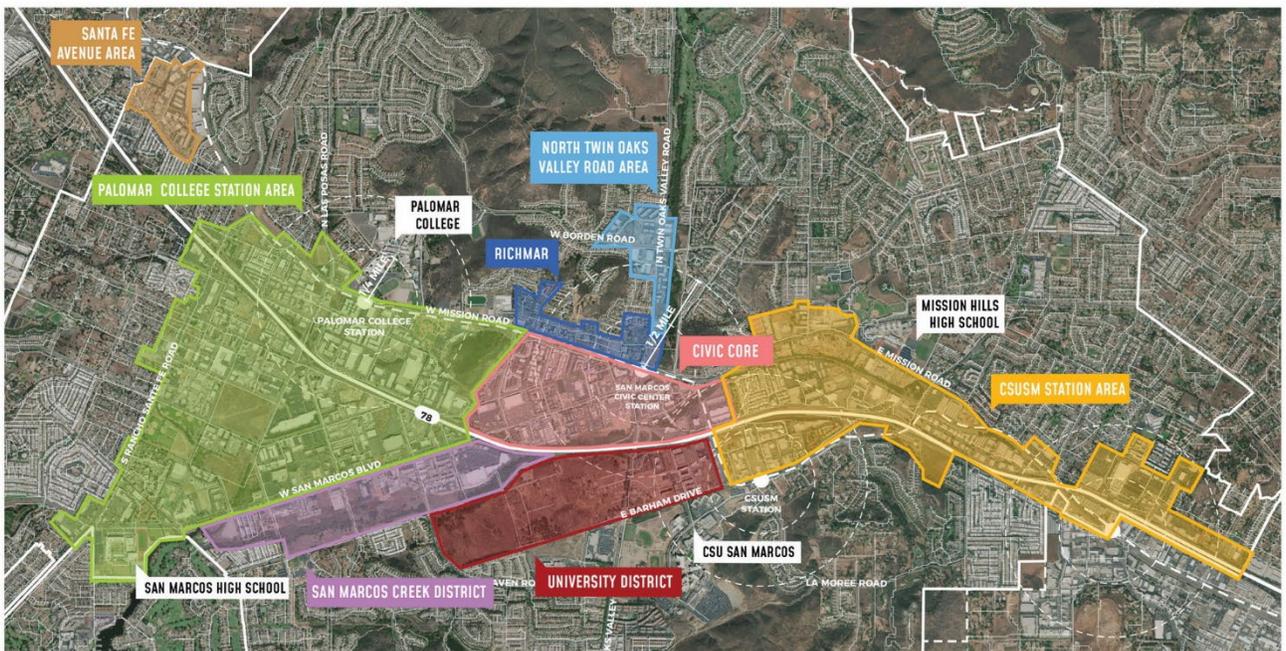


Think San Marcos needs more single family homes (55%)

Survey #2 examined respondents priorities and what they valued most in regards to housing opportunities in San Marcos. When asked, “How important are the following housing priorities to you and your family?” the top priorities listed as either “very important” or “somewhat important” were:

	Rehabilitate existing housing (89%)		Support fair/equitable housing opportunities and programs to maintain and secure neighborhoods that have suffered foreclosures (81%)
	Ensure that children who grow up in San Marcos can afford to live in San Marcos (86%)		Establish programs to help at-risk homeowners keep their homes, including mortgage loan programs (81%)
	Housing affordable to working families (83%)		

Survey #3 examined potential development areas. Respondents were shown a map of San Marcos and asked to give feedback regarding various locations. When asked, “Please rank the order of the potential new development areas, with #1 being the most favorable location and #8 being the least favorable location,” respondents ranked the locations as follows (from most favorable to least favorable):



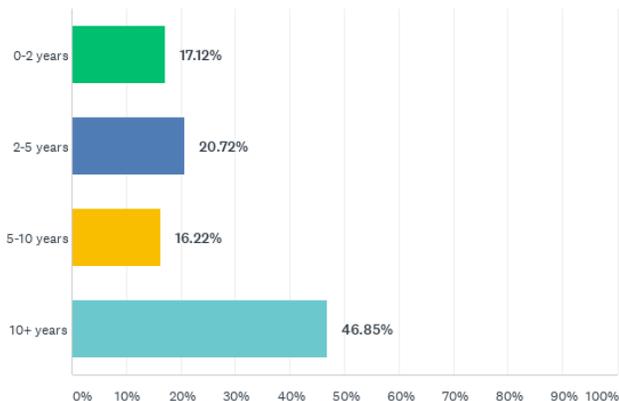
- | | |
|------------------------------|-------------------------------------|
| 1. San Marcos Creek District | 5. Palomar College Station Area |
| 2. University District | 6. Civic Core |
| 3. CSUSM Station Area | 7. North Twin Oaks Valley Road Area |
| 4. Richmar | 8. Santa Fe Avenue Area |

Survey #1: Respondent Demographics

The survey contained 7 questions related to demographics. One of those questions included an opportunity for users to sign-up for more information about the Housing Element update process. The other six questions highlighted the following about the respondents:

- Most respondents (93%) lived within the City, with only 7% of respondents living elsewhere.¹
- Of those individuals who live in San Marcos, approximately 47% have lived here for 10+ years. The next highest response (21%) was 2-5 years, followed by 0-2 years (17%).²
- Most of the respondents own their own home (85%), with 12% of respondents renting.³
- Most of the respondents (77%) live in a single-family homes, with the next highest category being multi-family homes (10%), followed by Duplex/attached homes (5%) and mobile homes (5%).⁴
- Of the respondents surveyed, the most common types of households include couples with children younger than 18 (44%), couples (22%), multi-generational households (9%), and single-person households (9%). There was considerable range in household types including 8%, who were an unlisted household type including couples with adult children living with them.⁵
- The respondents were primarily 40-55 years old (44%), followed by 24-39 years old (31%), and 56-74 years old (23%).⁶

Figure 1: How long have you lived in the City?



¹ Question 1: Do you live in San Marcos?

² Question 2: How long have you lived in the City?

³ Question 4: Do you currently own or rent your home?

⁴ Question 5: Select the type of housing that best describes your current home.

⁵ Question 9: Which of the following best describes your household type?

⁶ Question 14: What age range most accurately describes you?

Survey #1 Responses

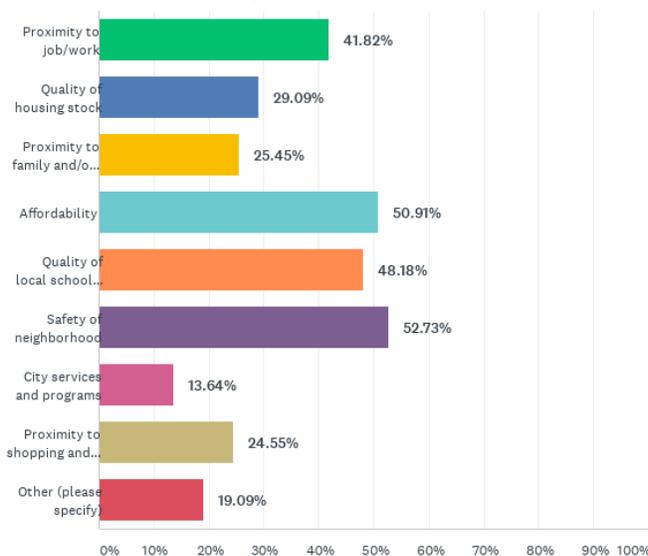
The survey responses reveal information about housing in San Marcos. The results are grouped into five categories: values and priorities; housing affordability; housing maintenance; and housing fit. In addition to looking at the survey results as a whole, we also looked at survey responses by demographic groups including how age, homeownership status, and household type influenced those responses.

VALUES AND PRIORITIES

When respondents were asked, “What made you decide to live here?”⁷ the most common answers were:

- Safety of neighborhood (53%)
- Affordability (51%)
- Quality of local school system (48%)
- Proximity to job/work (42%)
- Quality of local housing stock (29%)
- Proximity to family and/or friends (25%)
- Proximity to shopping and services (25%)

Figure 2: What made you decide to live here?



⁷ Question 3: What made you decide to live here?

When responses are broken down further by demographic groups, the following differences occur:

Respondents who rent vs. own a home are far more likely to cite proximity to job/work as an important factor (69%) than those who own (38%). Safety of the neighborhood was listed as a higher priority for those who rent (69%) than own (50%), but homeowners rated quality of the housing stock higher (33%) than did renters (8%).

There are also interesting differences between respondents of different ages. The quality of the local school system (71%) and safety of the neighborhood (77%) were ranked as more important to those 24-39 years old than any other age group (for Baby Boomers, school system and safety received a 15% and 38%, respectively).

There are also differences when it relates to household type. Individuals with children tended to rank quality of the school system and neighborhood safety much higher than individuals without children; leading this trend were multi-generational households, 80% of which stated quality of schools were a key reason for living in San Marcos and 90% of which stated neighborhood safety was a key reason for living in San Marcos. However, single person households, these issues were less of a factor when deciding where to live. Affordability was a key issue across household types; it was ranked as the first or second highest reason for choosing San Marcos in every household type except for multi-generational households and couples with children under 18 where it fell to third, behind issues of quality schools and safety.

Across demographic boundaries, respondents had other reasons for living in San Marcos, including frequently repeated themes of access to open space, parks and trails, and long-standing ties to the area.

HOUSING AFFORDABILITY

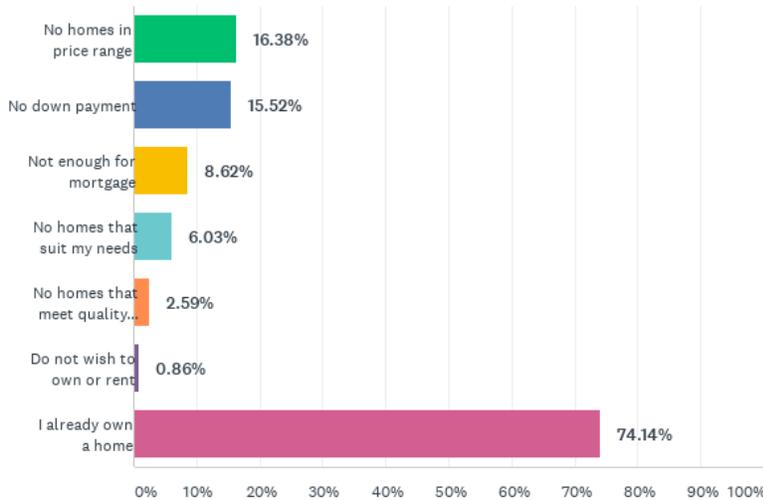
When respondents were asked, “If you wish to own a home in San Marcos but do not currently own one, what issues are preventing you from owning a home at this time?”⁸ the answers pointed to issues of affordability. The top three responses (for those respondents who do not already own a home) included:

- I cannot find a home within my price range in San Marcos (16%)
- I do not currently have the financial resources for an appropriate down payment (16%)
- I do not currently have the financial resources for an adequate monthly mortgage payment (9%)

⁸ Question 10: If you wish to own a home in San Marcos but do not currently own one, what issues are preventing you from owning a home at this time? (Select all that apply)

Less than 1% of respondents expressed the opinion that they do not wish to own or rent in San Marcos.

Figure 3: If you wish to own a home in San Marcos but do not currently own one, what issues are preventing you from owning a home at this time?



When responses are broken down further by demographic groups, the following differences occur:

For those who rent, 69% stated that they cannot find a home within their target price range, and they do not currently have the financial resources for an appropriate down payment. Only 15% stated they could not find a home that suits their quality standards in San Marcos, but 23% of renters did express that they cannot find a home that suits their living needs (such as housing size, or disability accommodations).

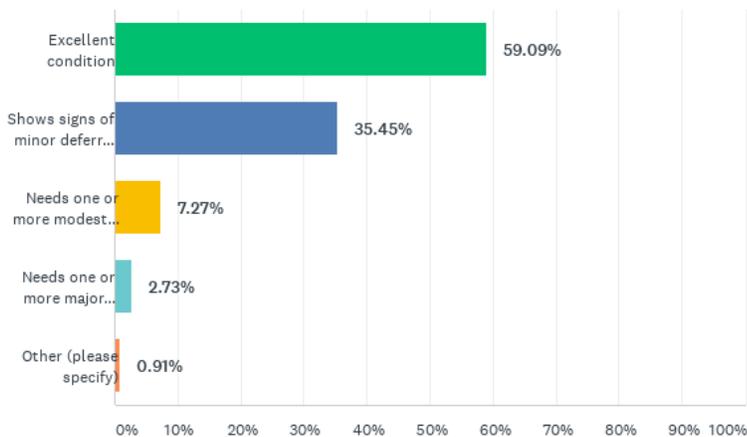
When it comes to differences between respondents of different age groups, Millennials (age 24-39) had the highest financial barriers: 28% say there are no homes within their desired price range; 22% do not have a down payment; and 14% do not have enough for a mortgage payment. However, there were many Millennials (58%) that stated that they already own a home in San Marcos.

When it comes to household type, those living in multi-generational households and single parents with children under 18 were the most likely to state that they could not find a house within their price range (36% and 25%, respectively) or express other financial concerns regarding a down payment and mortgage payments.

HOUSING MAINTENANCE

When respondents were asked, “How would you rate the physical condition of the residence you live in?”⁹ more than half of all respondents answered positively, with the response “excellent condition” receiving 59%.

Figure 4: How would you rate the physical condition of the residence you live in?



Homeowners were more likely than renters to respond that their residence was in excellent condition (63% vs. 31%). Renters listed higher rates of needed maintenance across all categories with over half of all renters (53%) stating that their residence showed signs of deferred maintenance, and 23% stating that one or more modest rehabilitation projects (such as a new roof, new siding, etc.) were needed.

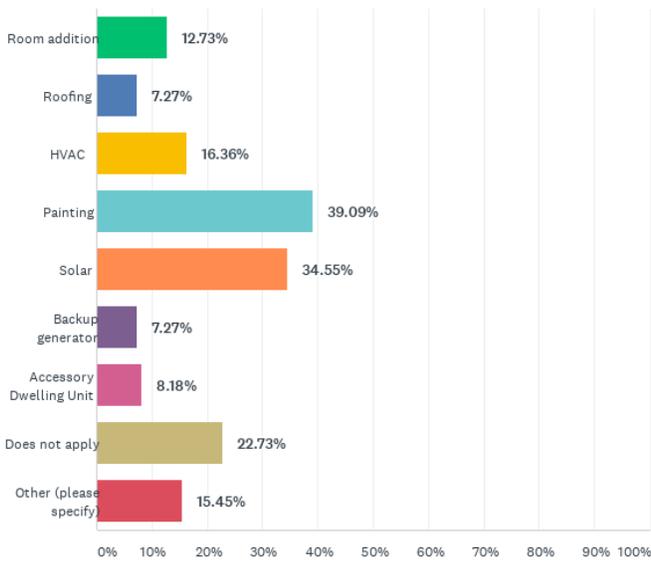
When it comes to comparing respondents based on age, the older the respondent, the more likely they were to state that their residence was in excellent condition. This may point to either the high quality of senior housing, or younger homeowners being more likely to live in less-expensive properties that need maintenance.

When asked, “Which of the following housing upgrades or expansions have you considered making on your home?” the top responses included:

- Painting (39%)
- Solar (35%)
- HVAC (16%)
- Other (15%)

⁹ Question 7: How would you rate the physical condition of the residence you live in?

Figure 5: Which of the following housing upgrades or expansions have you considered making on your home?



Some of the other answers included remodeling, kitchen upgrades, and outdoor improvements such as landscaping.

As would be expected, renters were more likely to answer that this question does not apply to them (77%), with the few improvements highlighted by renters being painting (15%) and solar (15%).

When it came to age differences, respondents age 24-39 years old were the most likely to say that they were considering a room addition (26%). Those 40-55 years old were most likely to highlight painting (50%), and those 56-74 years old highlighted solar (35%).

HOUSING FIT

When asked, “How satisfied are you with your current housing situation?”¹⁰ the top responses were:

- I am very satisfied (60%)
- I am somewhat satisfied (23%)
- I am somewhat dissatisfied (13%)
- I am dissatisfied (4%)

¹⁰ Question 6: How satisfied are you with your current housing situation?

There were differences in responses, however, between homeowners and renters. 67% of homeowners were “very satisfied” as opposed to only 8% of renters.

Looking at this difference in more depth, renters and owners were grouped into two groups “satisfied” or “dissatisfied.” Satisfied included anyone who answered positively to the statements, “I am very satisfied,” or “I am somewhat satisfied.” Dissatisfied included anyone who answered positively to the statements, “I am somewhat dissatisfied,” or “I am dissatisfied.” These two groups voiced their satisfaction as follows:

Homeowners: 92% satisfied; 8% dissatisfied

Renters: 74% satisfied; 26% dissatisfied

Single parents with children under the age of 18 showed the highest levels of dissatisfaction with 25% stating, “I am very dissatisfied.” That number was closely followed by single person households.

Other comments that were received include:

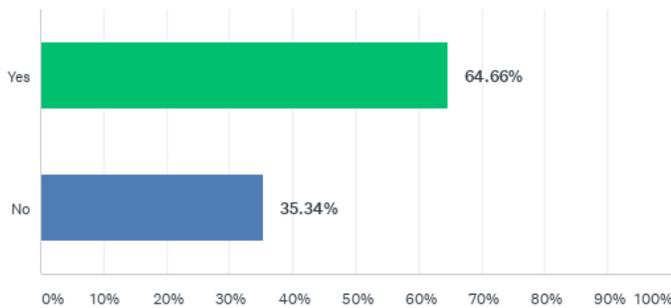
- Rent continues to increase each year and has become unaffordable
- Home prices are too high
- Traffic congestion and traffic-related noise have become a problem
- Too much natural land is being developed
- Houses are being built too close together
- Residents have to go elsewhere to receive quality medical treatment
- There aren’t enough cultural attractions
- Overcrowded schools

When asked, “Do you think that the range of housing options currently available in the City of San Marcos meets your needs?”¹¹ respondents answered:

- Yes (65%)
- No (35%)

¹¹ Question 11: Do you feel that the different housing types in San Marcos currently meet your housing needs?

Figure 6: Do you think that the range of housing options currently available in the City of San Marcos meets your needs?



However, the breakdown along homeownership lines illuminates a significantly different response, with 77% of homeowners answering “Yes”, as opposed to only 7% of renters.

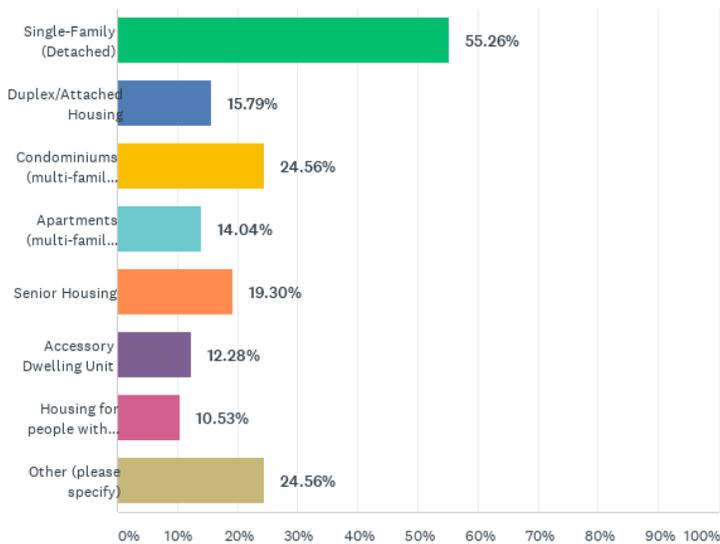
That same contrast was mirrored in household types. Single-person households were more likely to state “No,” as were young adults living with parents, multi-generational households, and couples living with roommates.

When asked, “What types of housing are most needed in the City of San Marcos?”¹² respondents answered:

- Single family detached (55%)
- Condominiums (multifamily ownership homes) (25%)
- Other (24%)
- Senior Housing (19%)
- Duplex/Attached Housing (16%)

¹² Question 12: What types of housing are most needed in the City of San Marcos?

Figure 7: What types of housing are most needed in the City of San Marcos?



Renters were more likely than homeowners to state that more single family detached housing was needed (77% vs. 55%).

Single person households were the most likely to rate condominiums (40%) or senior housing (40%) as their top priority.

When it comes to age comparisons, Baby Boomers (ages 56-74) were the least likely to state that more single family detached housing was needed (26%).

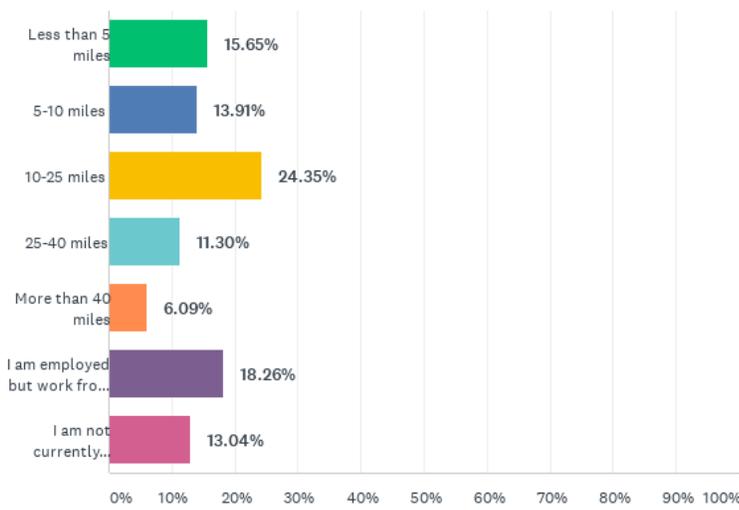
Some of the other responses included:

- Low income
- Handicap accessible housing
- Housing in close proximity to parks, transportation, shopping
- Missing middle housing (townhomes, rowhouses)
- Houses with granny flat for elderly parents aging in place
- Mixed use- commercial and condos
- Senior housing/ Single story homes for older homeowners

When asked, “If you are currently employed, approximately how long is your one-way commute to work?” respondents were most likely to reply:

- 10-25 miles (24%)
- I am employed, but work from home (18%)
- Less than 5 miles (15%)

Figure 8: If you are currently employed, approximately how long is your one-way commute to work?



Survey Responses #2

The second survey focused on understanding the relative importance of various housing priorities to the respondent and their family.

When asked, “Do you live and/or work in San Marcos?” respondents stated:

- Yes (90%)
- No (10%)

Note that if the respondent answered “no,” to this question they were not allowed to complete the remainder of the survey. They needed to live in San Marcos in order to answer the next question. This preserves the integrity of the survey questions, but also lowered the completion rate (87%) of the survey.

When asked, “How important are the following housing priorities to you and your family?” the top priorities listed as either “very important” or “somewhat important” were:

- Rehabilitate existing housing (89%)
- Ensure that children who grow up in San Marcos can afford to live in San Marcos (86%)
- Housing affordable to working families (83%)
- Support fair/equitable housing opportunities and programs to maintain and secure neighborhoods that have suffered foreclosures (81%)
- Establish programs to help at-risk homeowners keep their homes, including mortgage loan programs (81%)

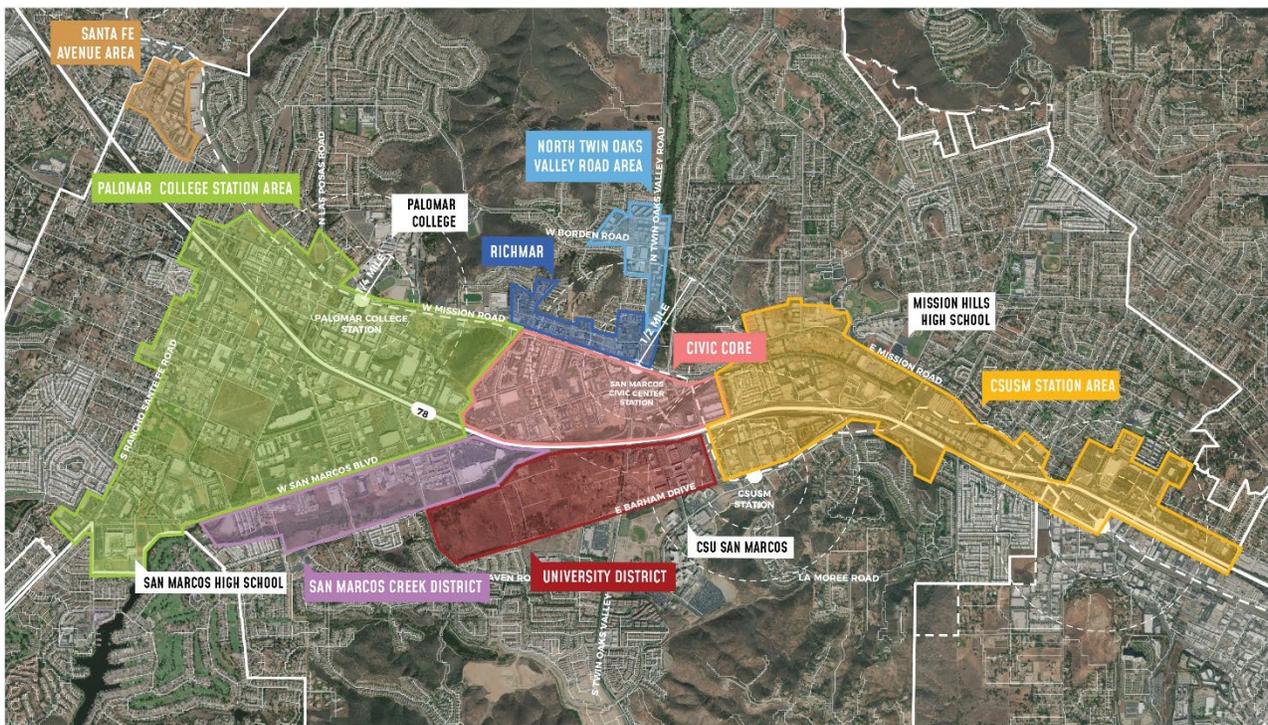
The issues that were ranked as the lowest importance were:

- Build more single-family housing (55%)
- Build more multi-family housing (apartments, condos, etc.)

Based on what respondents stated in the previous survey, there may be a disconnect, or the results may indicate that respondents view this issue as more complex than simply building more housing.

Survey Responses #3

Survey #3 examined potential development areas. Respondents were shown a map of San Marcos and asked to give feedback regarding potential areas for new development.



When asked, “Looking at the map below, please rank the order of the potential new development areas, with #1 being the most favorable location and #8 being the least favorable location,” respondents ranked the locations as follows (from most favorable to least favorable):

1. San Marcos Creek District
2. University District

-
3. CSUSM Station Area
 4. Richmar
 5. Palomar College Station Area
 6. Civic Core
 7. North Twin Oaks Valley Road Area
 8. Santa Fe Avenue Area

When asked, “Are there any other areas of the City where you think new housing development might be appropriate?” responses included:

- Open land near Bradley Park
- San Marcos Boulevard
- Lower right corner of map
- Undeveloped land north and East
- Santa Fe Hills
- Areas West of Rancho Santa Fe Road (should be zoned for duplex or townhomes)
- Rancho Santa Fe Road and Mission Avenue
- Across from where Sprouts and Nordstrom Rack are
- Buena Creek Area
- Richland Road towards farm area
- Annex unincorporated land around Twin Oaks
- University Heights near Carlsbad border
- Melrose & Rancho Santa Fe

Appendix A: Survey #1

Appendix B: Summary of Survey #1 Responses

Appendix C: Summary of Survey #1 Responses by Group

Survey Responses by Homeownership Status

Survey Responses by Age

Survey Responses by Household Type

Appendix D: Survey #2

Appendix E: Summary of Survey #2 Responses

Appendix F: Survey #3

Appendix G: Summary of Survey #3 Responses