

Chinatown Economic Action Plan Community Forum

A low-angle, night-time photograph of a traditional Chinese building. The building features a tiled roof with ornate decorations and several windows with glowing interior lights. In the foreground, a green metal pole supports a traditional Chinese lantern with a red frame and a warm, yellow light. The background is dark, showing some bare tree branches.

April 29, 2008

Mayor's Office of Economic and Workforce Development and EDAW | AECOM

Economic Action Plan Process

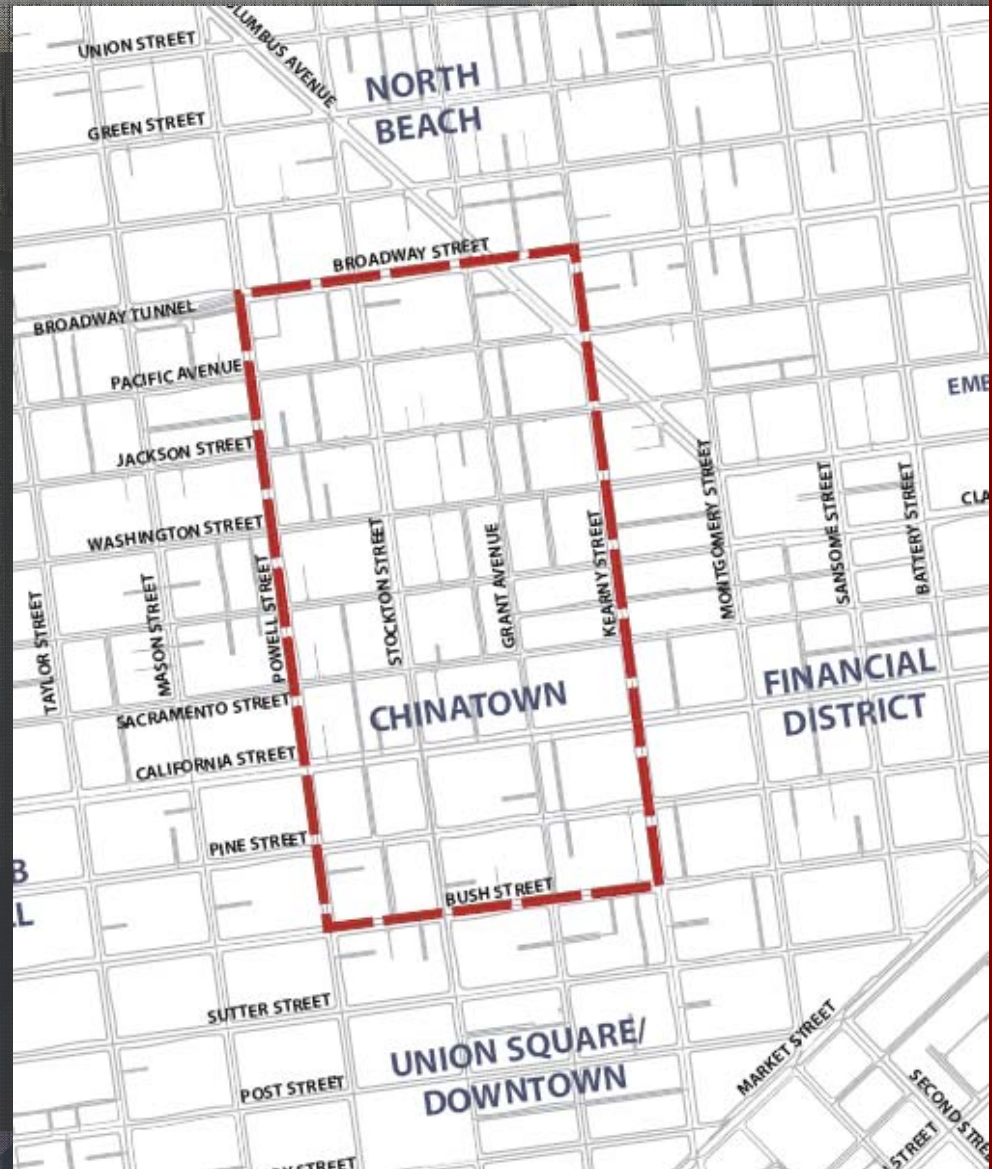
- Review and Analysis of Economic Trends
- Visitor and Shopper (Intercept) Survey
- Key Informant Interviews
- Economic Forum



Quick Demographic Facts

Chinatown:

- ~10,000 residents
- ~5,200 homes
- Average Household Size
 - Chinatown: 1.9
 - San Francisco: 2.3
 - U.S.: 2.6



Population Density and Home Ownership

Chinatown:

- 115 Persons/Acre

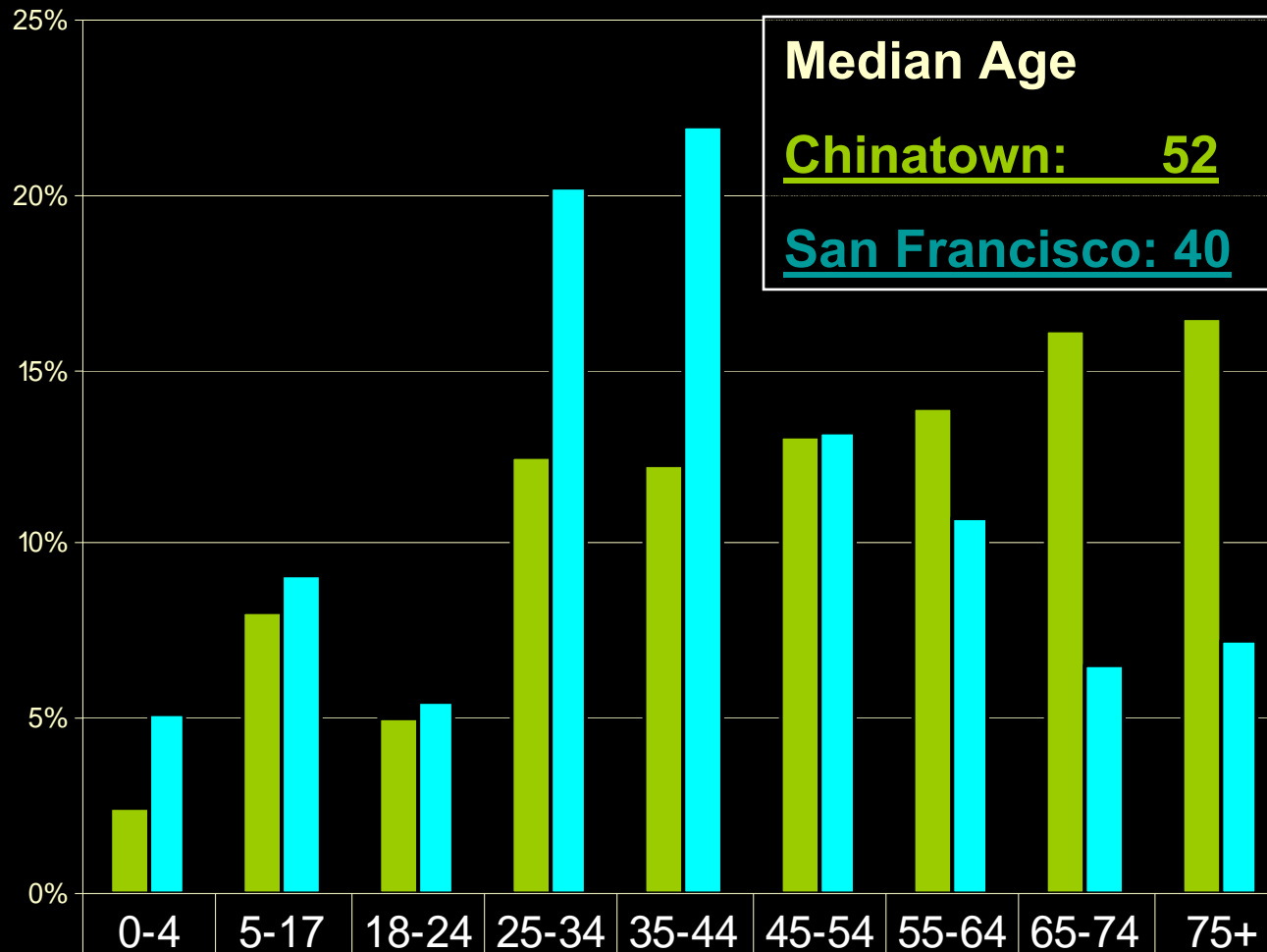
San Francisco:

- 25 Persons/Acre

Ownership	Chinatown	San Francisco	United States
Renter Occupied	95%	65%	34%
Owner Occupied	5%	35%	66%

Age (2007)

Percent of Population

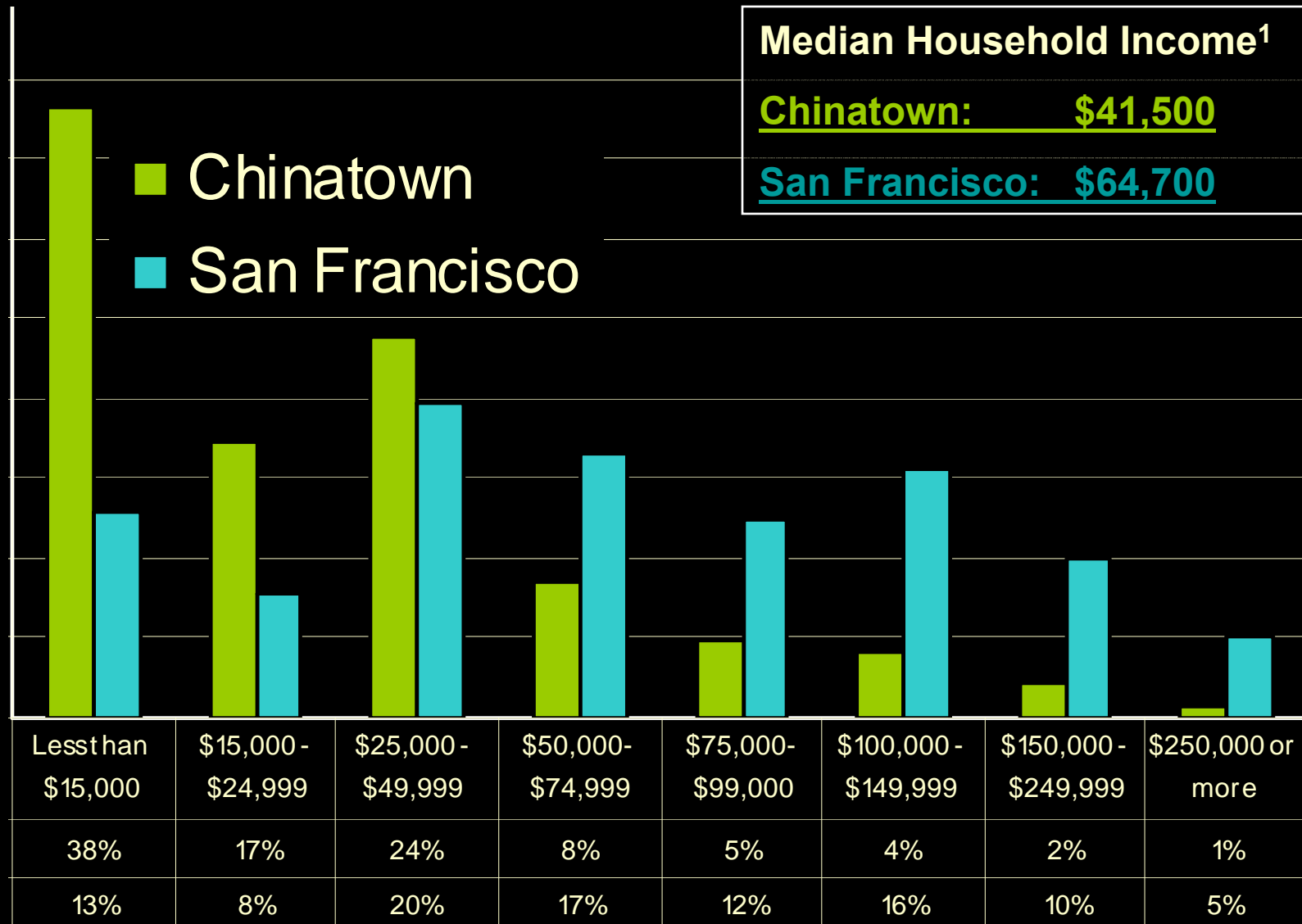


■ Chinatown	2%	8%	5%	13%	12%	13%	14%	16%	16%
■ San Francisco	5%	9%	5%	20%	22%	13%	11%	7%	7%

Source: Claritas, Inc.

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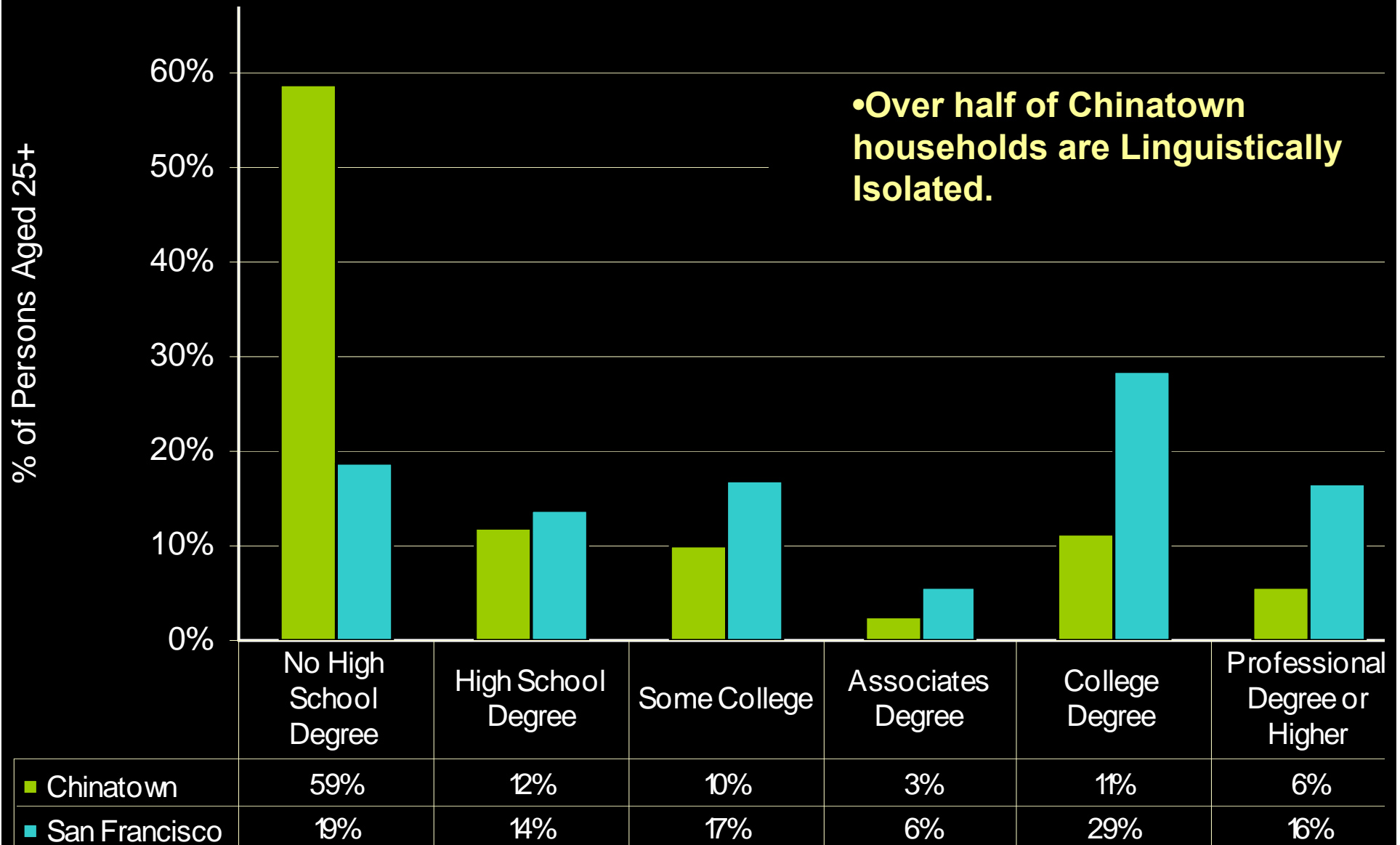
Household Income (2007)



Source: Claritas, Inc; Social Compact, San Francisco Drilldown.

¹Chinatown household income estimates are higher than those reported by the census by accounting for unreported income and income generated through the informal economy as estimated through the San Francisco Drilldown report.

Education Levels (2000)



Source: U.S. Census, 2000.

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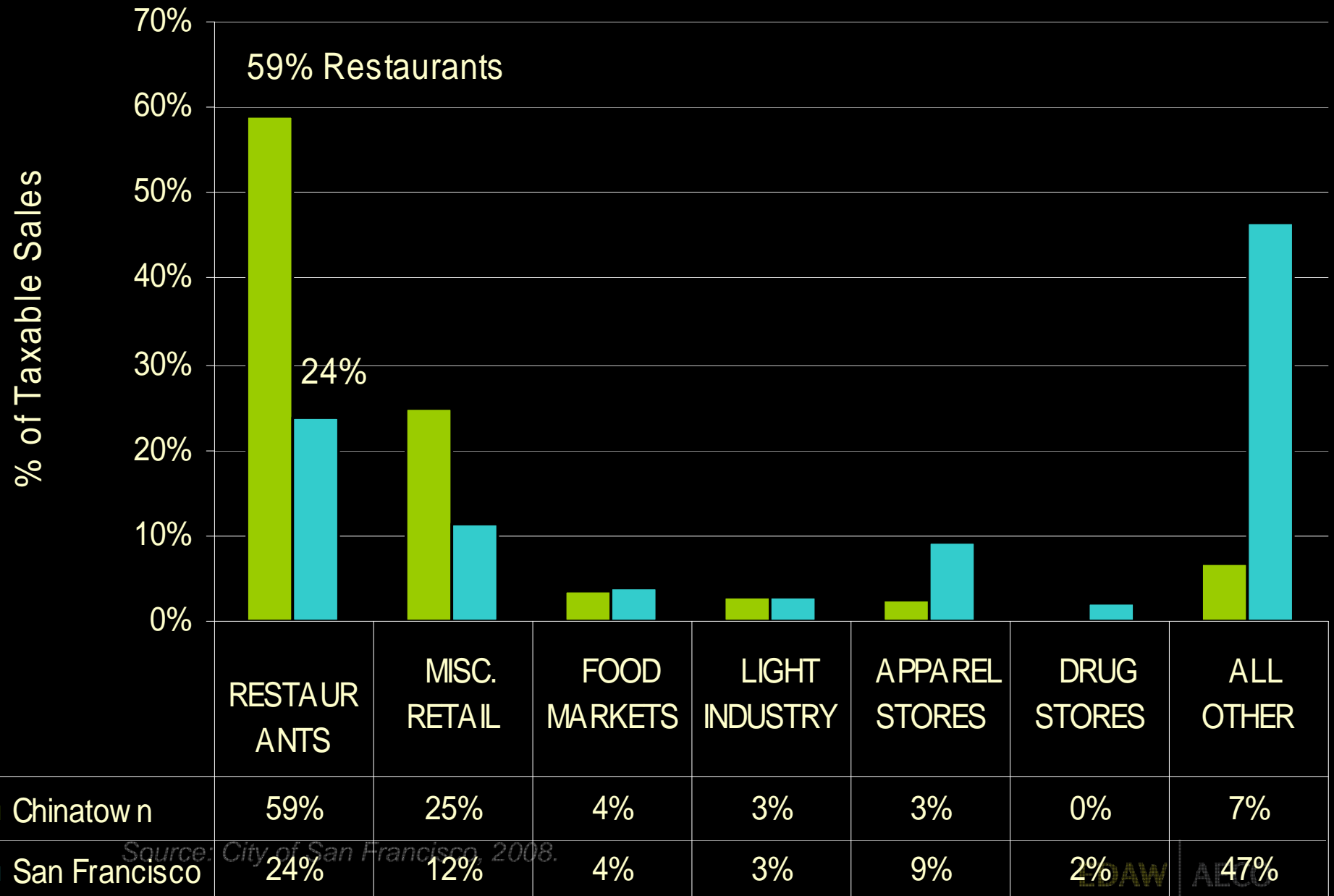
Quick Business Facts

Overall Trends

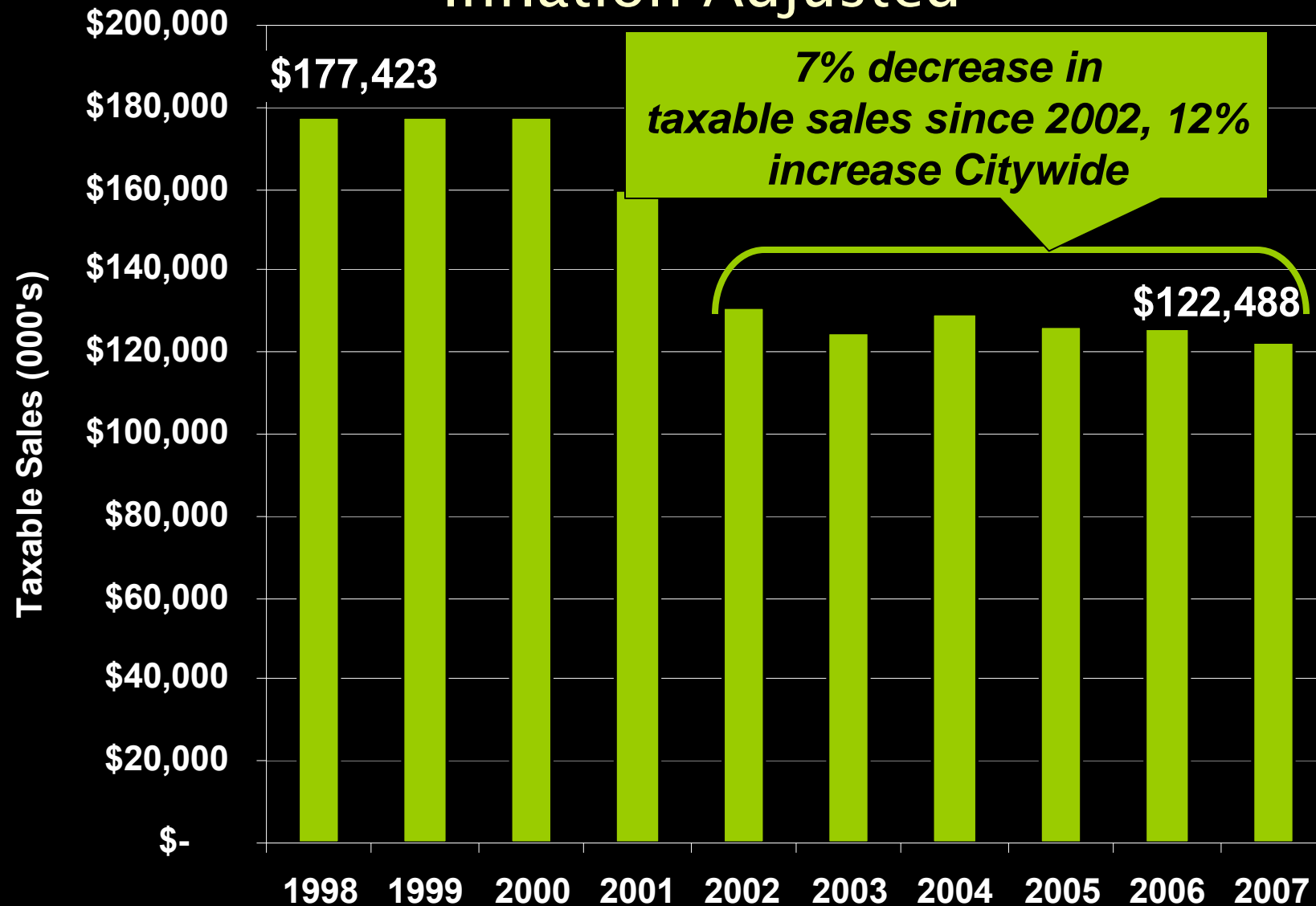
- Retail sales dependent on vibrant restaurants/food
- Decreasing retail sales
- Recovering hotel market



Distribution of Taxable Retail Sales, 2007



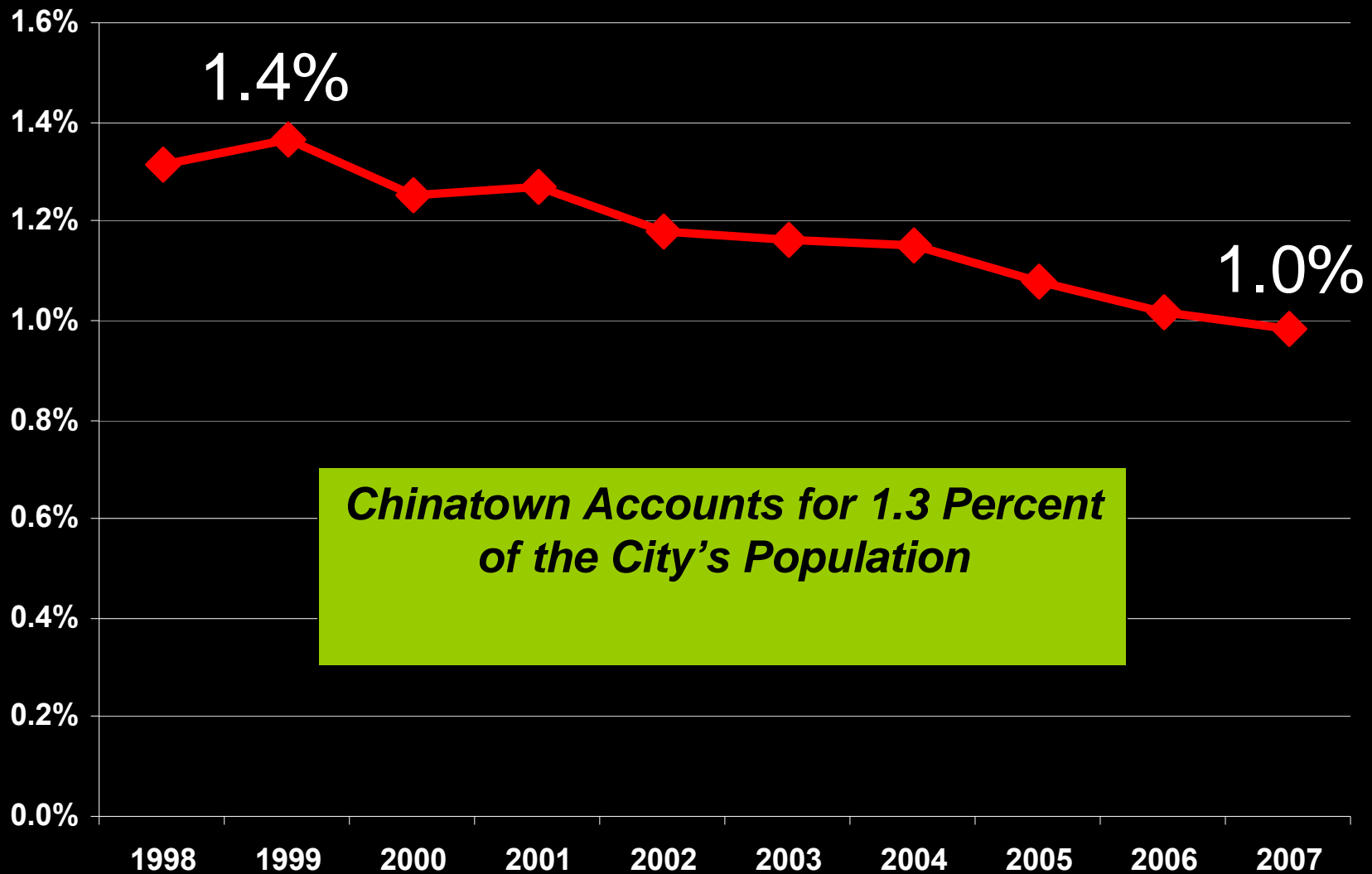
Taxable Sales Trends, 1998 – 2007, Inflation Adjusted



Source: City of San Francisco, 2008.

Taxable Sales Trends, 1998 – 2007

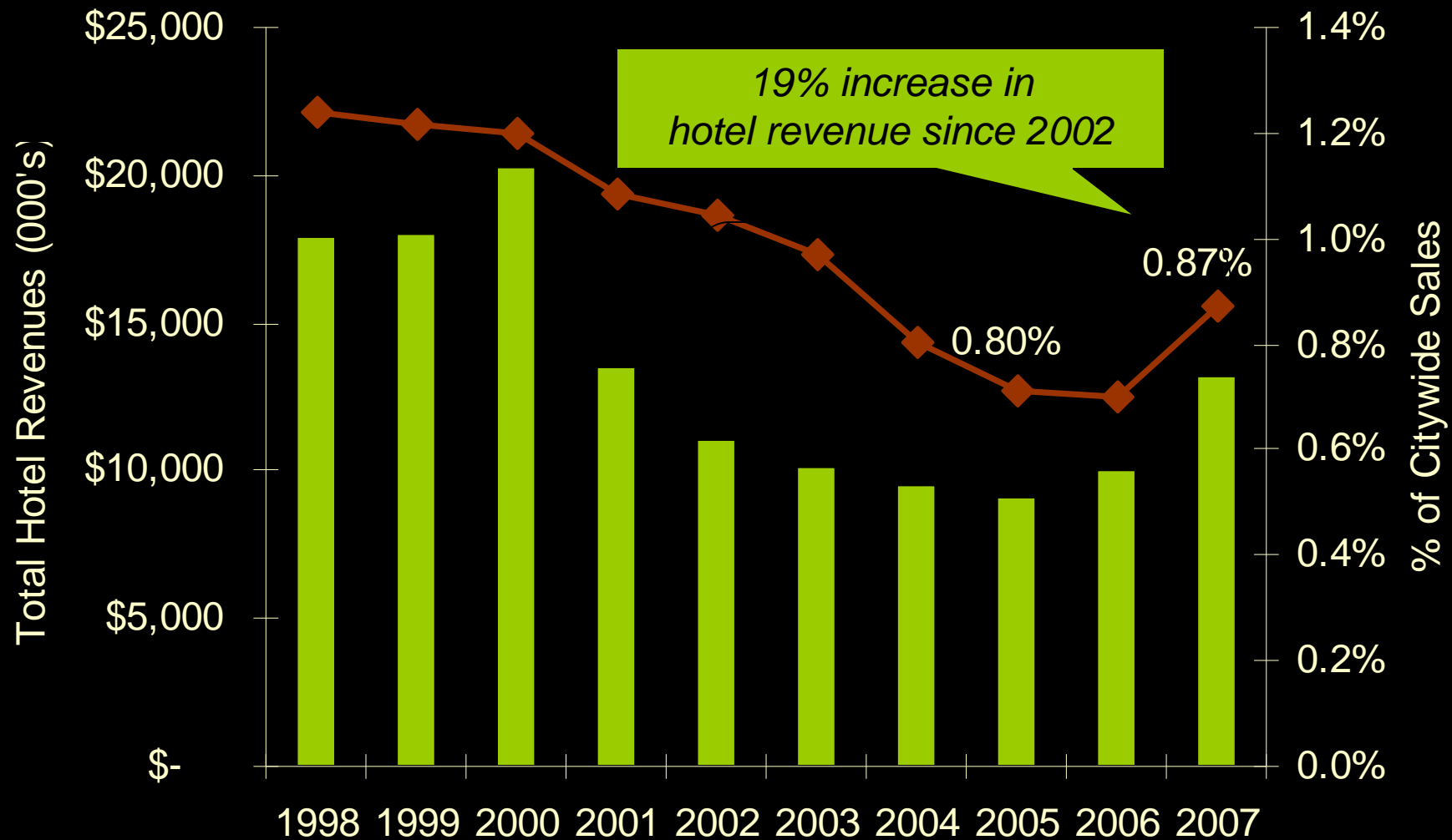
% of Citywide Taxable Sales



Source: City of San Francisco, 2008.



Hotel Revenue, 1998 - 2007 (Chinatown)



Hotel guests spend approximately \$120 in restaurant, recreation, and retail purchases per day.*

Chinatown is the third most visited area among hotel visitors behind Fisherman's Wharf and Union Square.

*San Francisco Visitors Bureau, 2004 Hotel Survey

Customer Survey

Street Survey

- 143 Respondents
- Weekday, Night, Weekend in March

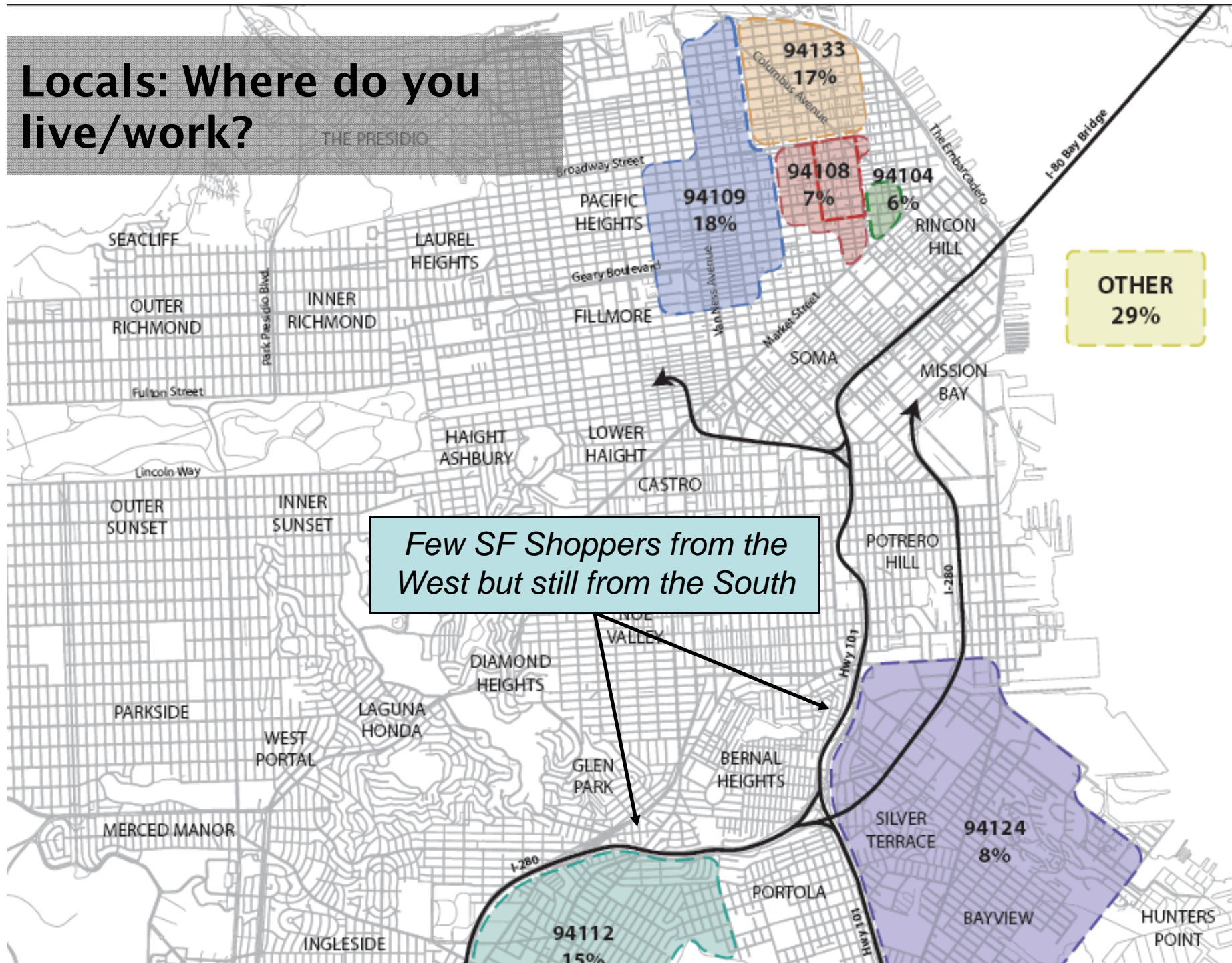
71 – Locals (residents and workers)

72 - Visitors

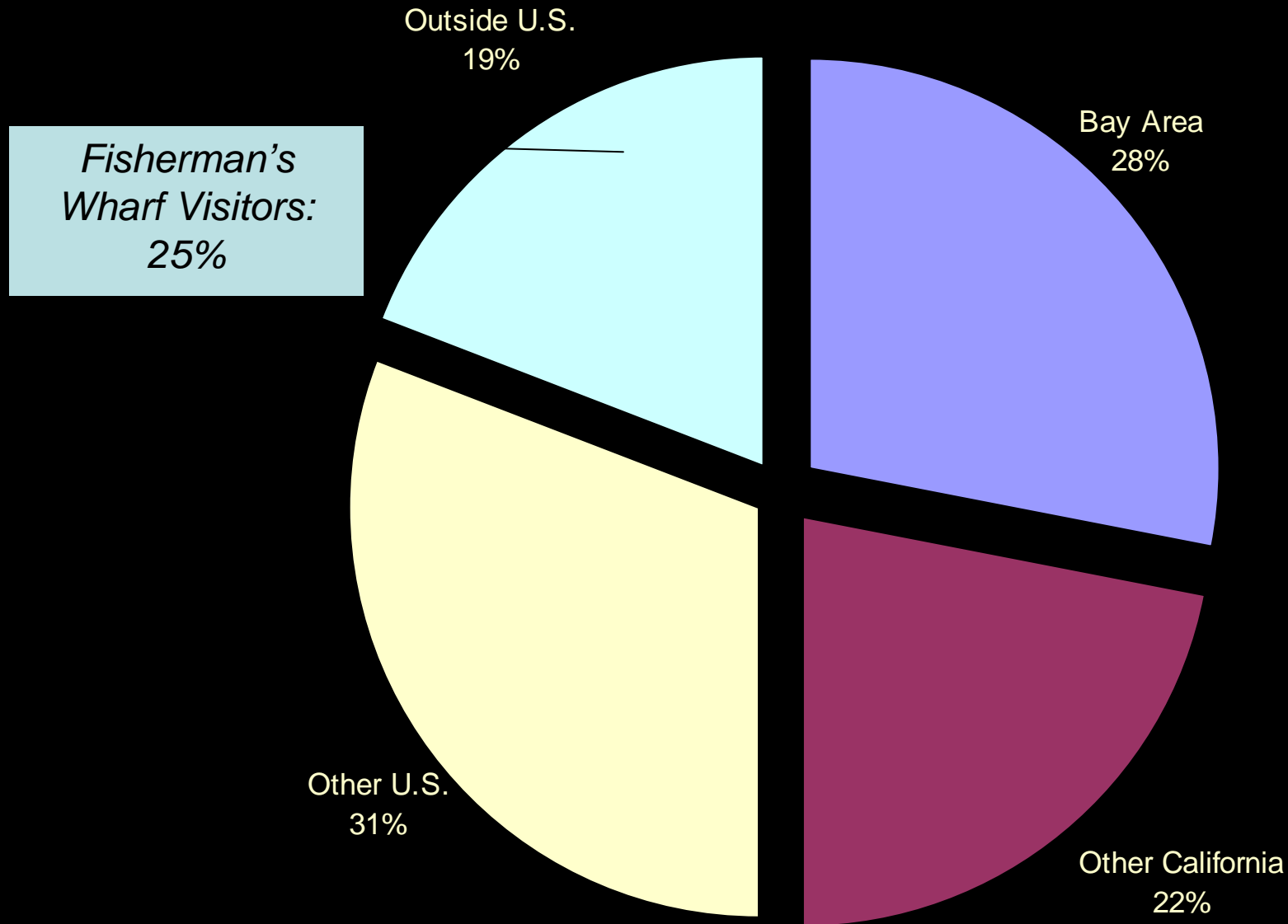
- 46% Response Rate



Locals: Where do you live/work?



Customer Survey: Where are visitors from?



Visitors: Where are you coming from?



Customer Survey – Transportation

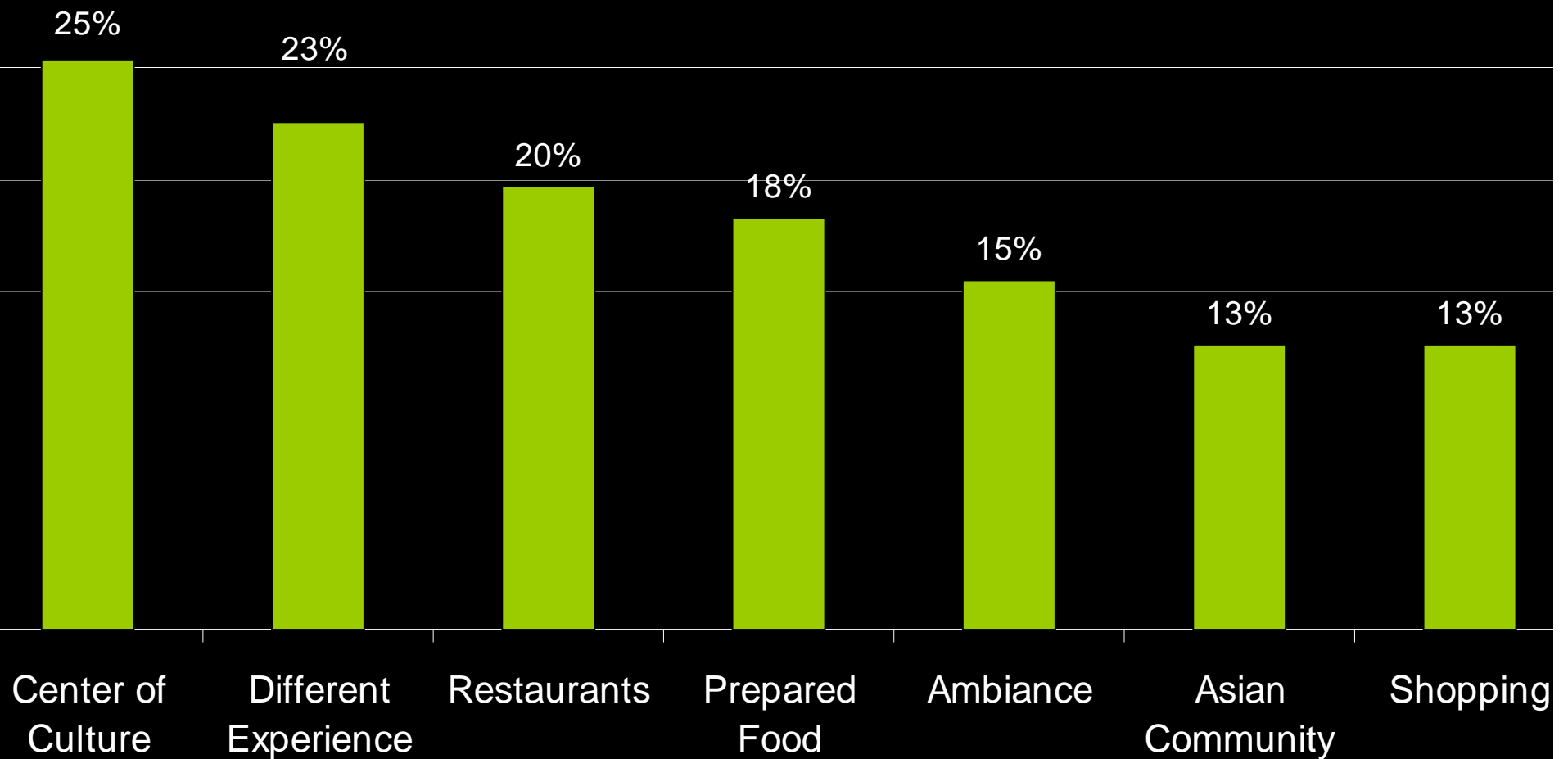
- 44% of respondents took public transit
 - 22% came by Muni
- 45% walked
- Visitors are more likely to drive (24%)



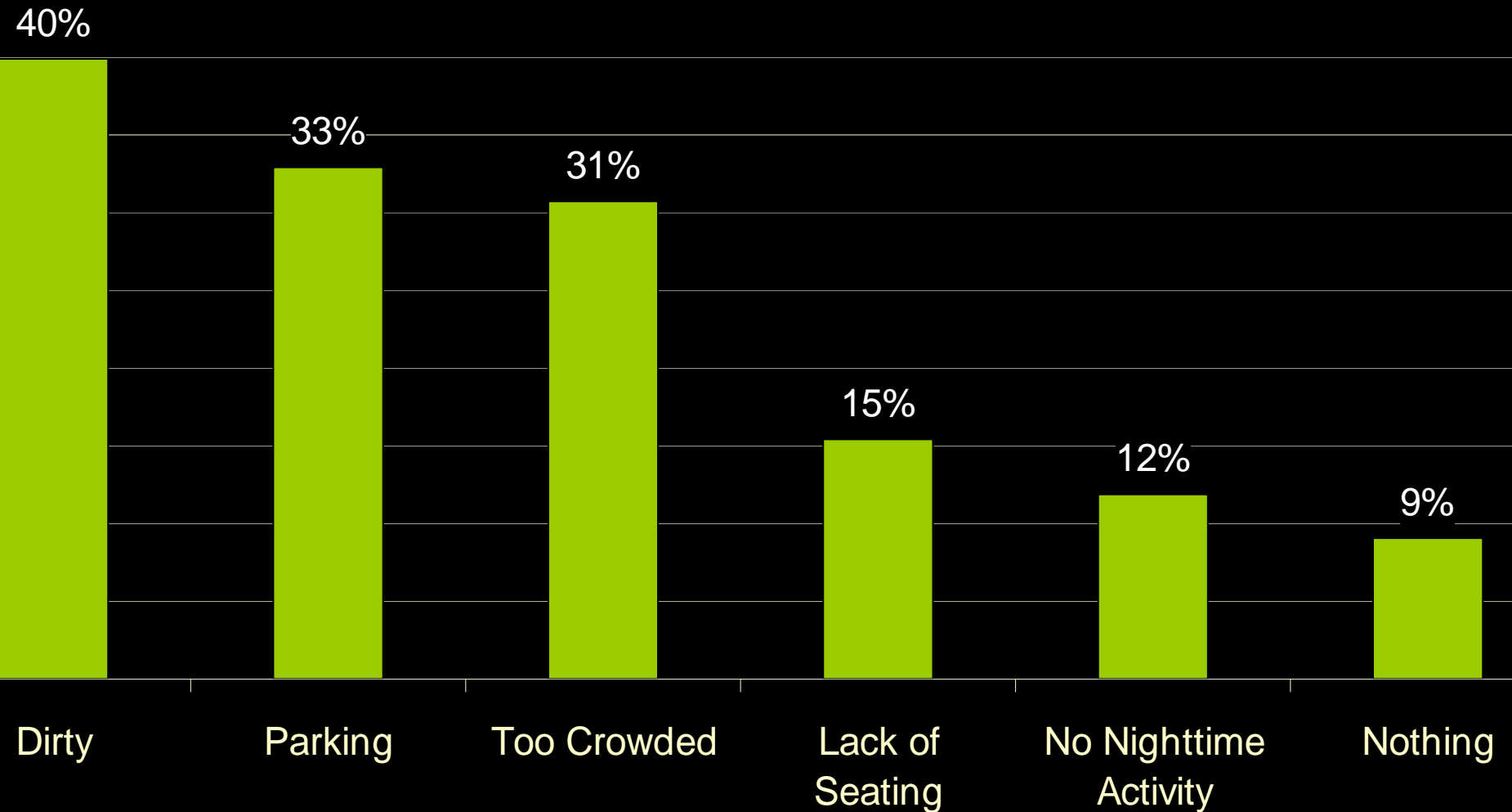
Customer Survey: Comparison to Other Areas

- How does Chinatown compare to other neighborhoods of San Francisco?
- Generally positive.
 - **Access:** 77% said better or same
 - **Outdoor Environment:** 62% said better or same
 - **Shopping Environment:** 69% said better or same
 - **Safety:** 88% said better or same
- **Issues:**
 - 25% said building condition was worse
 - 31% said parking was worse

Customer Survey: Favorite Things (Visitors) Culture / Atmosphere / Food



Customer Survey: Top Six Issues Dirty /Parking / Too Crowded



Key Informant Interviews



Key Informant Interviews

Over 65 Stakeholder Interviews

- **Businesses**

- *Andy Young Grand Palace Property Owner
- *Anna Wong SF Public Library
- *Annie Chung Self-Help for the Elderly
- *Anthony Ng Chinatown Newcomers
- *Arnold Lee Chinese Consolidated Benevolent Association Benson Louie
- *Bill Lee Planning Commission

- **Community Groups**

- *Bok Pan Commander Cathay Post No. 384, Chinatown Economic Development Group
- *Francine Chiu Mayor's Office of Community Development
- *Bryant Tam Chinese Community Development Center Captain

- **Non-Profit Organizations**

- *James Dudley Central Station Police Captain
- *Small Business Commission
- *Board Cindy Wu Chinese Community Development Center
- *David Chiu Grassroots Enterprise
- *Derek Fong Wells Fargo

- **Active Community Members**

- *Doreen Lee Molend Carmichael Hotel
- *Eddie Tsang Tsang Insurance
- *Eric Leung Bank of America
- *Francis Tsang Mayor's Office of Neighborhood Services

- **City Departments**

- *Francisco Hsieh Commissioner on Asian Pacific Islander American Affairs
- *Garret Gerritsen Triton Hotel

- Local Residents Focus Group - born and raised in San Francisco - mostly at Chinese Hospital in the 1970's

- *Glenn and Annie Fong Fong Association, Owner of Rims on Grant Avenue
- *Gordon Mar Chinese Progressive Association
- *Harrison Lim Lim Family Association

- Homer Teng Chinatown Families Economic Self-Sufficiency Coalition

- Irene Yee Riley

- Bank of America, Housing Authority, Small Business Commission

- Jennifer Wong First Republic Bank

Economic Development Issues

- Physical Conditions
- Business Retention and Attraction
- Cultural Programs and Events
- Marketing and Customer Attraction
- Cleanliness and Safety
- Public Transportation and Parking

Physical Conditions - 外在情況

- Exterior building conditions
- More alleyway improvements
- Land use controls limit development opportunities
- Few places to sit outside
- Cluttered stores and crowded sidewalks



Business Retention and Attraction

商業的保持與吸引

- Not enough retail diversity
 - More high end retailers
- Need to increase coordination across businesses/joint marketing
- Lack of knowledge of available city resources
- Stores close early



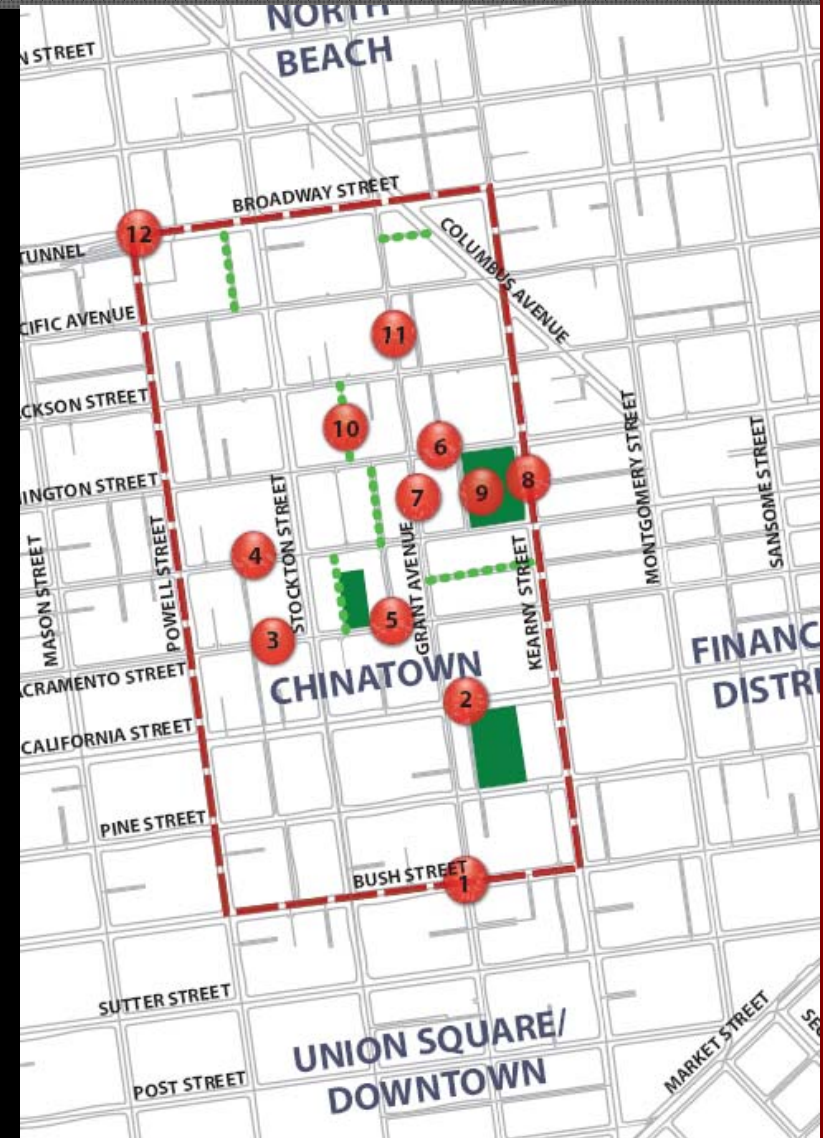
Cultural Programs and Events - 文化計劃與特別節目

- Lack of night time activity
- Limited supply of public arts
- Not enough programmed events
 - For tourists
 - Bay Area residents



Marketing and Customer Attraction – 行銷和顧客吸引

- De-centralized marketing efforts
- No comprehensive directory of businesses and cultural resources
- Need better signage / way-finding



Cleanliness and Safety

安全與清潔

- **Graffiti/vandalism**
- **Availability/ cleanliness/ signage of public toilets**
- **Overflow of garbage bins**
- **Better pedestrian lighting**

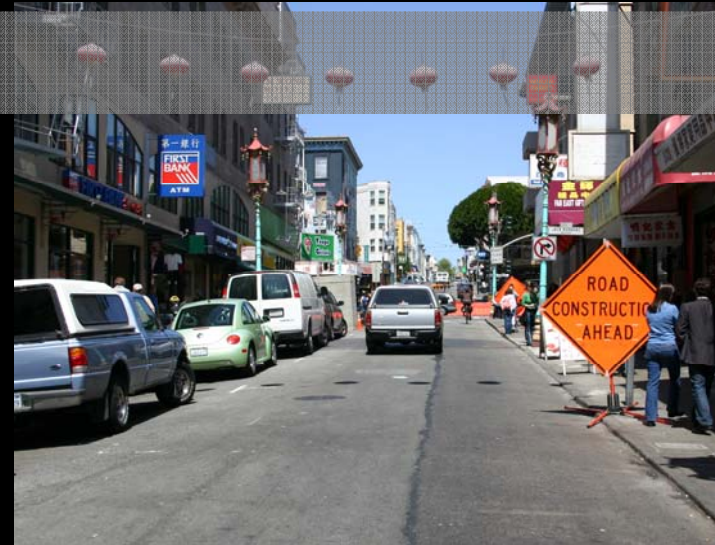


Parking and Public Transportation – 公共交通和停車



Parking

- Shortage of daytime parking
- Double parking, circling, contributing to heavy traffic in area.
- Complaints of potential abuse of handicapped placards



Subway completion date 2016

SAN FRANCISCO CHINATOWN

Proposed Central Subway Alignment

6,500
Transfers

78,000
riders

Legend:

— Neighborhood Boundary

— MUNI Line

--- Cable Car Line

■ BART Stations

■ MTA Parking Garages

Proposed Alignments

— Proposed Subway Line

--- Proposed Future Subway Line
Expansion

MUNI Proposed Change in Service

- Add frequency of 1-California all day.
- Modified 19-Polk will replace the 9X-Bayshore north of Chinatown.
- 10-Townsend and 12-Pacific will be combined and extended through Mission Bay and Potrero Hill to Bayview/Hunters Point.

* Muni expansion source:
http://www.sfstep.com/files/Proposals_District_3_updated.pdf

Chinatown Economic Action Plan
San Francisco, CA
April 2008



Mayor's Office of
Economic and
Workforce Development
City of San Francisco

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Existing Programs/Efforts

- Community-based groups and City agencies already responding to many identified issues
- Examples: alleyway improvement program, business technical assistance services, parking policy initiatives, tourist promotions campaigns
- Proposed strategies may be increased marketing and/or expansion of existing services
- More information during City Department Panel



Potential Economic Action Policies and Programs

華埠經濟開發策略

- **Physical Conditions**
- **Business Retention and Attraction**
- **Cultural Programs and Events**
- **Marketing and Customer Attraction**
- **Cleanliness and Safety**
- **Public Transportation and Parking**

How Policies and Programs Were Developed

- Key Informant Interviews
- Customer Survey
- Chinatown Case Studies
- Mayor's Office Experience in Other Areas
- Policies/Programs from Other Cities

Physical Conditions - Alleys

- Build upon current alleyways program to get additional lighting, and landscaping, and encourage commercial activity
- 在現有的里巷計劃基礎之上增加照明，景觀並鼓勵商業活動



Physical Conditions – Streetscape Improvements/ Greening

- Initiate **greening** and **streetscape beautification** projects
- 創建綠化和街景美化工程
- Increase **street furniture** where it does not conflict with pedestrian circulation
- 在與行人流線無衝突的區域增設街道家具



Physical Conditions- Facades/Mixed-Use

- Establish business facade improvement program, including restoration of neon signs
- 設立臨街改善計劃，幫助恢復霓虹燈飾
- Identify appropriate sites for limited mixed-use development that does not result in displacement of residents
- 識別適當地點，作有限度混合發展用途，同時避免遷移住客



Physical Conditions- Gateway

- Establish “Welcome to Chinatown” sign above the Gate and Stockton Tunnel
- 在Gate和Stockton 隧道上方建立“歡迎光臨華埠”的標示牌



Business Retention and Attraction – Business Assistance/Merchant Organizer

- Expand and target **small business assistance** services
- 擴大小型商業輔助服務
- Hire **merchant organizer** to help businesses with marketing and accessing resources
- 聘請商家組織者幫助商業推廣和獲取資源



Business Retention and Attraction – Attract New Customer Base/Wireless

- Attract an **anchor restaurant/lounge** or other nighttime attraction that draws new customers to the neighborhood
- 吸引錨點餐館／休憩場所或其他夜間項目，吸引新顧客
- Help businesses establish **wireless internet services**
- 幫助商家建立無線網絡設施



Business Retention and Attraction – Business Tenant Improvement Grants

- Establish a commercial **tenant improvement grant** program
- 建立租戶改善撥款計劃
 - Matching Grant for Interior Improvements
 - Interior Design Services



Cultural Programs and Events – Nighttime Activities

- Create **Outdoor Movie** in the Park Series
- 在公園裏設置露天劇
- Enhance **Night Market**
- 改善夜市
- Offer tours of **Chinatown's Night Spots**
- 提供華埠夜間景點導遊
- Promote evening entertainment shows at **Great Star Theater**
- 于大明星戲院推廣夜間娛樂表演



Cultural Programs and Events – Public Art/ Heritage Tourism

- Increase **public art** and heritage installations in Chinatown
- 增加華埠藝術和文化遺產設施
- Facilitate partnerships between business community and cultural establishments to **promote arts and cultural events**
- 促進商界和文化機構合作，推廣藝術文化節目



Cultural Programs and Events - Events

- Attract **food vendors** to cultural events
- 吸引飲食攤販參加文化節目
- Promote **youth sports** events
- 推廣青少年体育節目



Marketing and Customer Attraction – Marketing Campaign / Alumni

- **Increase marketing** of Chinatown and cultural events to tourists and visitors by targeting hotels, local visitor guidebooks, and the tourist related web sites.
- 以酒店，本地遊客指南，和與遊客有關的網站為對象，加強向遊客和訪客推廣華埠及其文化活動
- Form a Chinatown **alumni association** to help support and promote Chinatown
- 成立華埠前成員協會，幫助支援和推廣華埠



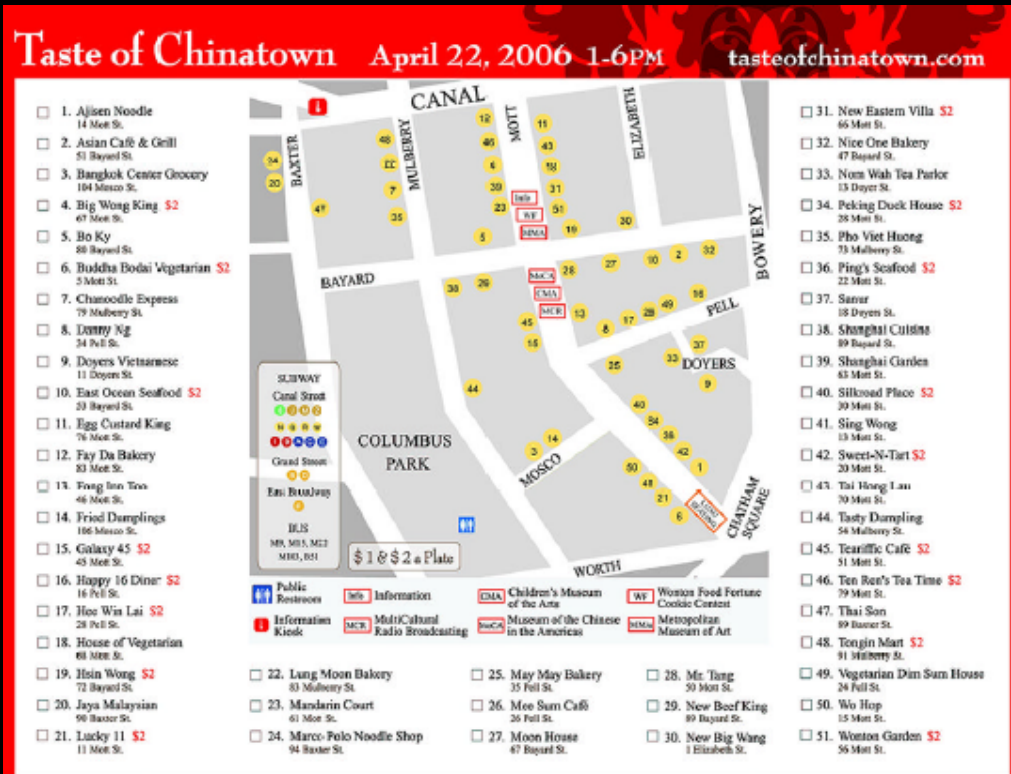
Marketing and Customer Attraction – Signage and Local Directory

- Add wayfinding/signage to and within Chinatown
- 增設如何前往華埠和在華埠內的指引標誌
- Develop cultural heritage interests and business directory
- 編製文化遺產景點和商業指南



Marketing and Customer Attraction – Visitor Center and Website

- Establish Chinatown visitors information center with website
- 建立華埠遊客諮詢中心和網站



Cleanliness and Safety – Street Cleaning/ Public Toilets

- Establish long-term **sidewalk cleaning** and **graffiti abatement** program
- 建立長期清理人行道和清除塗鴉計劃
- Increase **DPW services** during Chinese holidays and events
- 在中國節假日期間增加工務局服務
- Increase availability, hours, and cleanliness of **public toilets**
- 增加公用衛生間的數量，服務時段和清潔度



Cleanliness and Safety – Police Foot Patrol / Lighting

- Increase police foot patrols
- 增加巡警
- Increase lighting in select alleyways, streets, and tunnels
- 改善部分里巷，街道和隧道照明



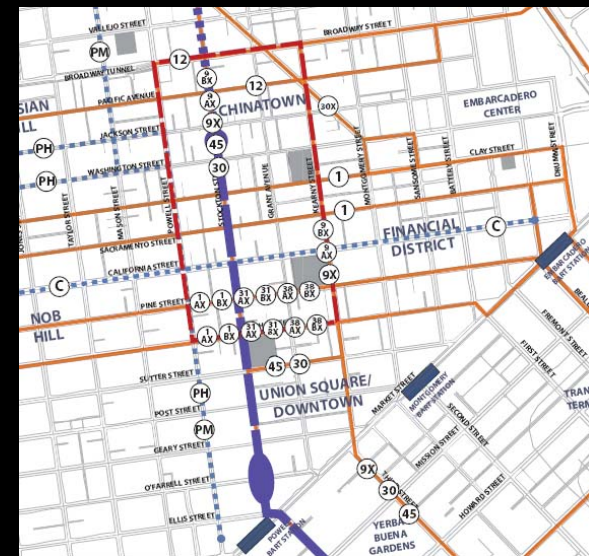
Parking and Transportation – Traffic Study/ Parking Pricing

- Perform **traffic and parking management study**
- 進行交通和停車管理研究
- **Lower evening parking prices at Portsmouth Square Garage**
- 降低Portsmouth廣場停車場夜間停車費用



Parking and Transportation - Signage / Valet / Shuttle

- Employ **electric signs** directing people to **parking garages** with availability
- 安裝能顯示停車場停車位狀況的電子指示
- Work with merchants to establish **valet parking**
- 協調商家建設專人代泊車服務
- Expand/better market Golden Gateway Garage **parking shuttle** program
- 擴大推廣往返Golden Gateway停車場穿梭車計劃



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Questions Prioritization

A low-angle, upward-looking photograph taken at night. On the left, a portion of a classical building is visible, featuring a light-colored facade with ornate carvings and a series of green-tiled roof elements. A window is visible, showing some interior lights. On the right, a traditional Chinese-style lantern is mounted on a green, textured pole. The lantern has a red, hexagonal frame and is illuminated from within, casting a warm glow. The background is dark, with some bare tree branches visible.

April 29, 2008

**Mayor's Office of Economic and Workforce Development, Local Initiatives Support
Coalition, and EDAW | AECOM**

Additional Background Material

SAN FRANCISCO CHINATOWN

Existing Transit Services

Legend:

- Neighborhood Boundary
- MUNI Line
- - - Cable Car Line
- BART STATION BART Stations
- MTA PARKING GARAGE MTA Parking Garages



Chinatown Economic Action Plan
San Francisco, CA
April 2008

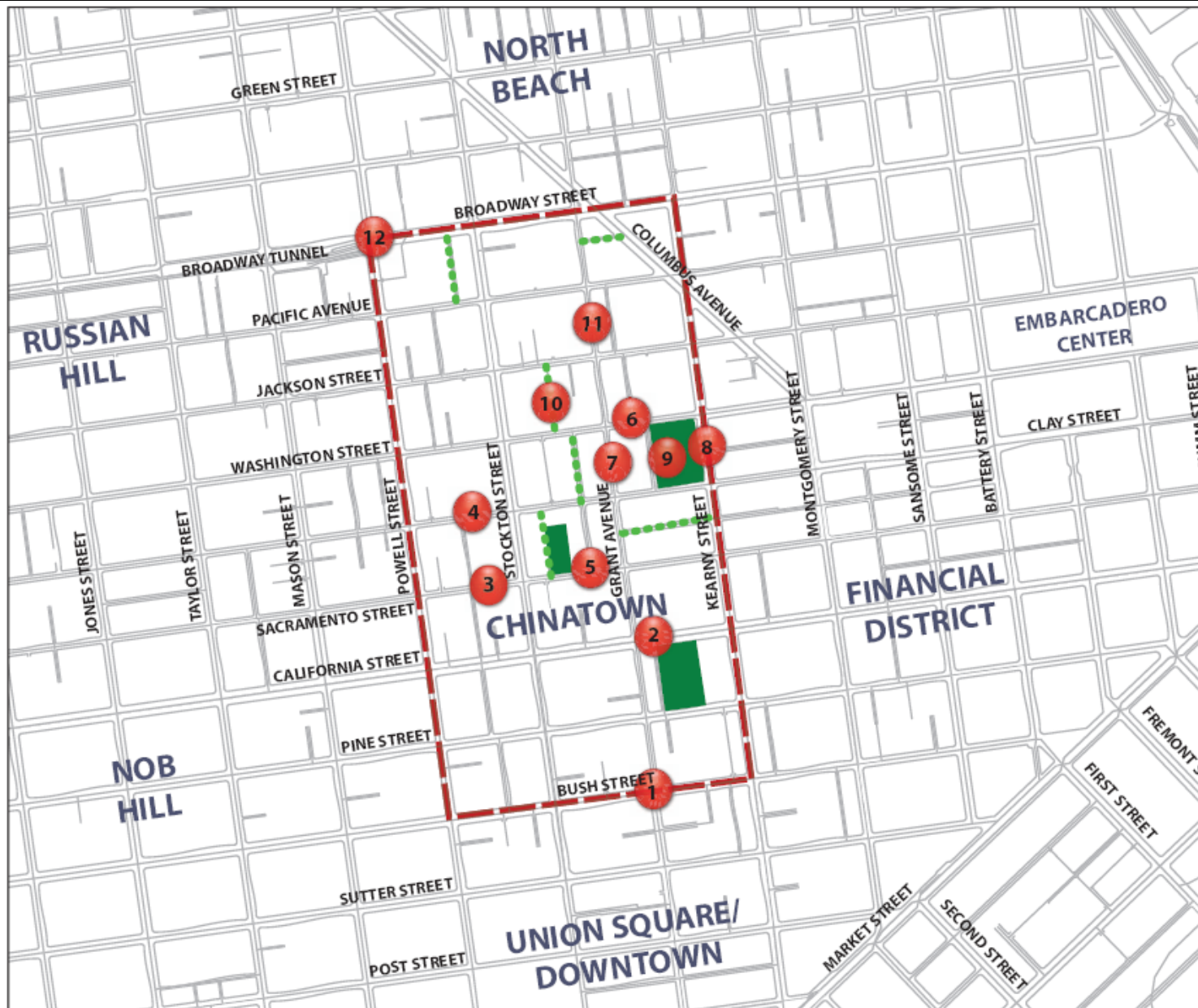


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Cultural Destinations



SAN FRANCISCO CHINATOWN

Cultural Destinations

Legend:

— Neighborhood Boundary

... Improved Alleys

■ Parks

Destinations

- 1 Dragon Gates
- 2 Old Saint Mary's Church
- 3 Donaldina Cameron House
- 4 Chinese Historical Society
- 5 Clarion Music Center
- 6 Bank of Canton
- 7 Empress of China Restaurant
- 8 Culture Center of San Francisco
- 9 Portsmouth Square
- 10 Golden Gate Fortune Cookie Factory
- 11 Golden Gate Bakery
- 12 Imperial Tea House

Chinatown Economic Action Plan
San Francisco, CA
April 2008

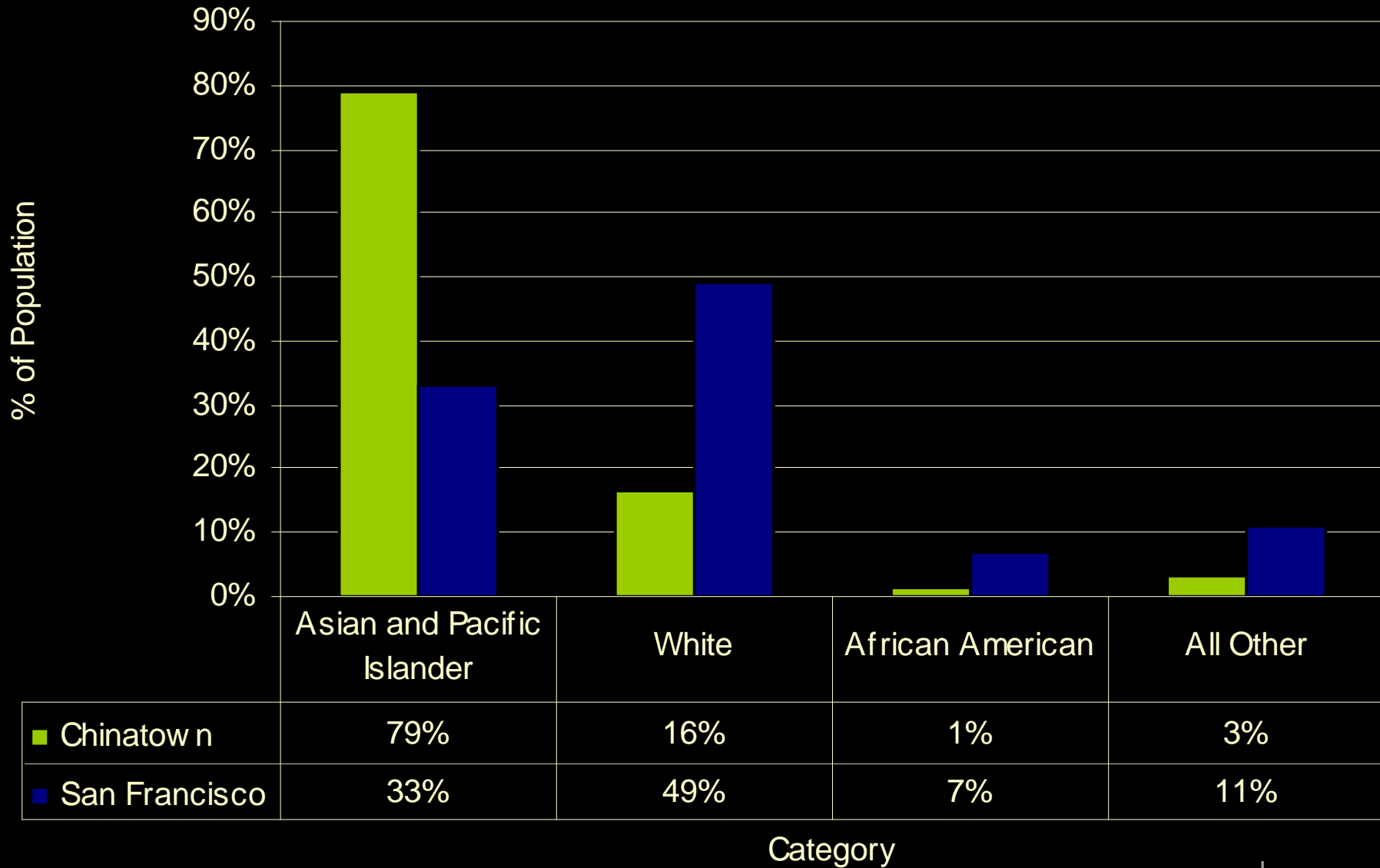


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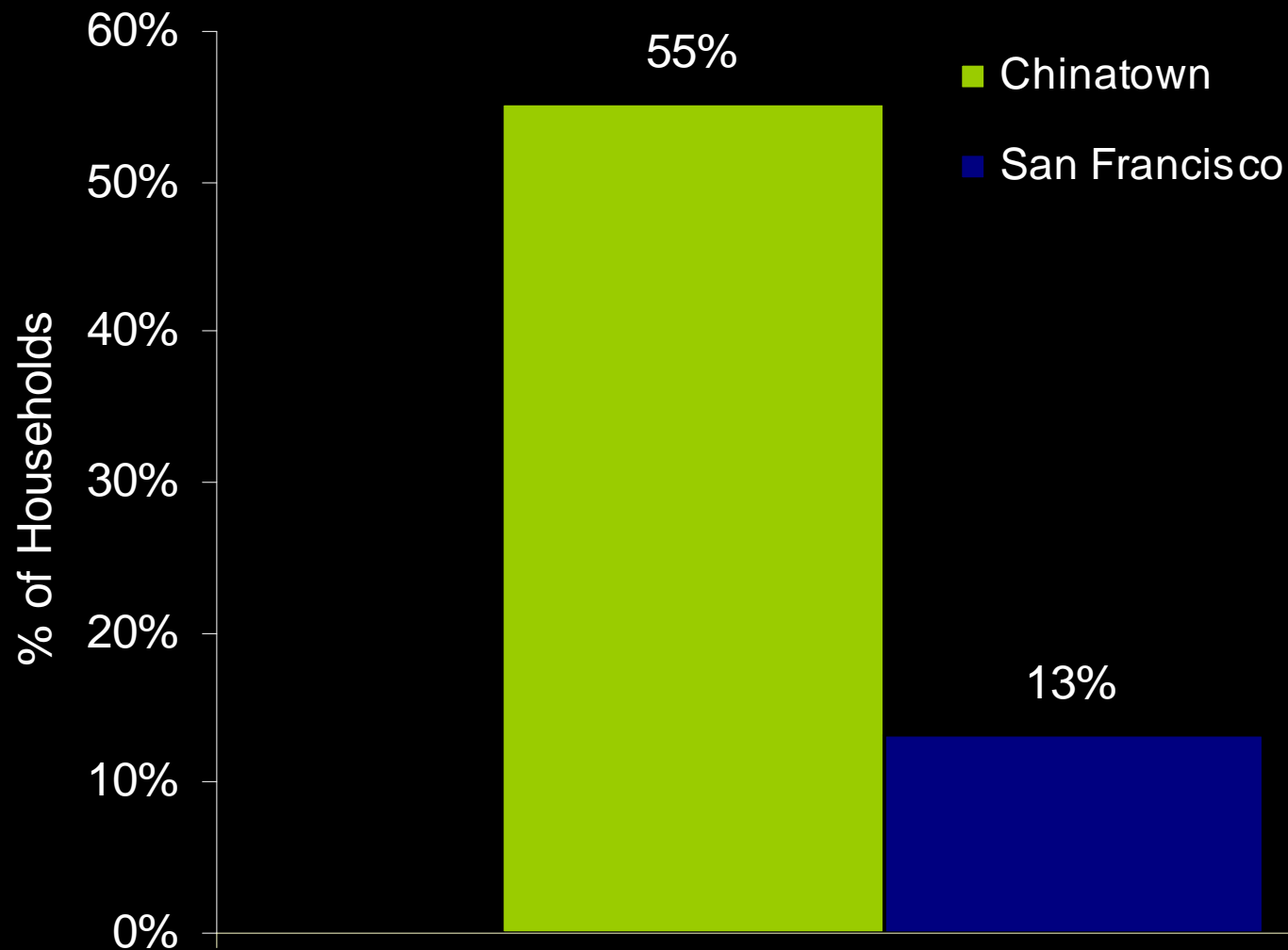
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Chinatown Racial Composition

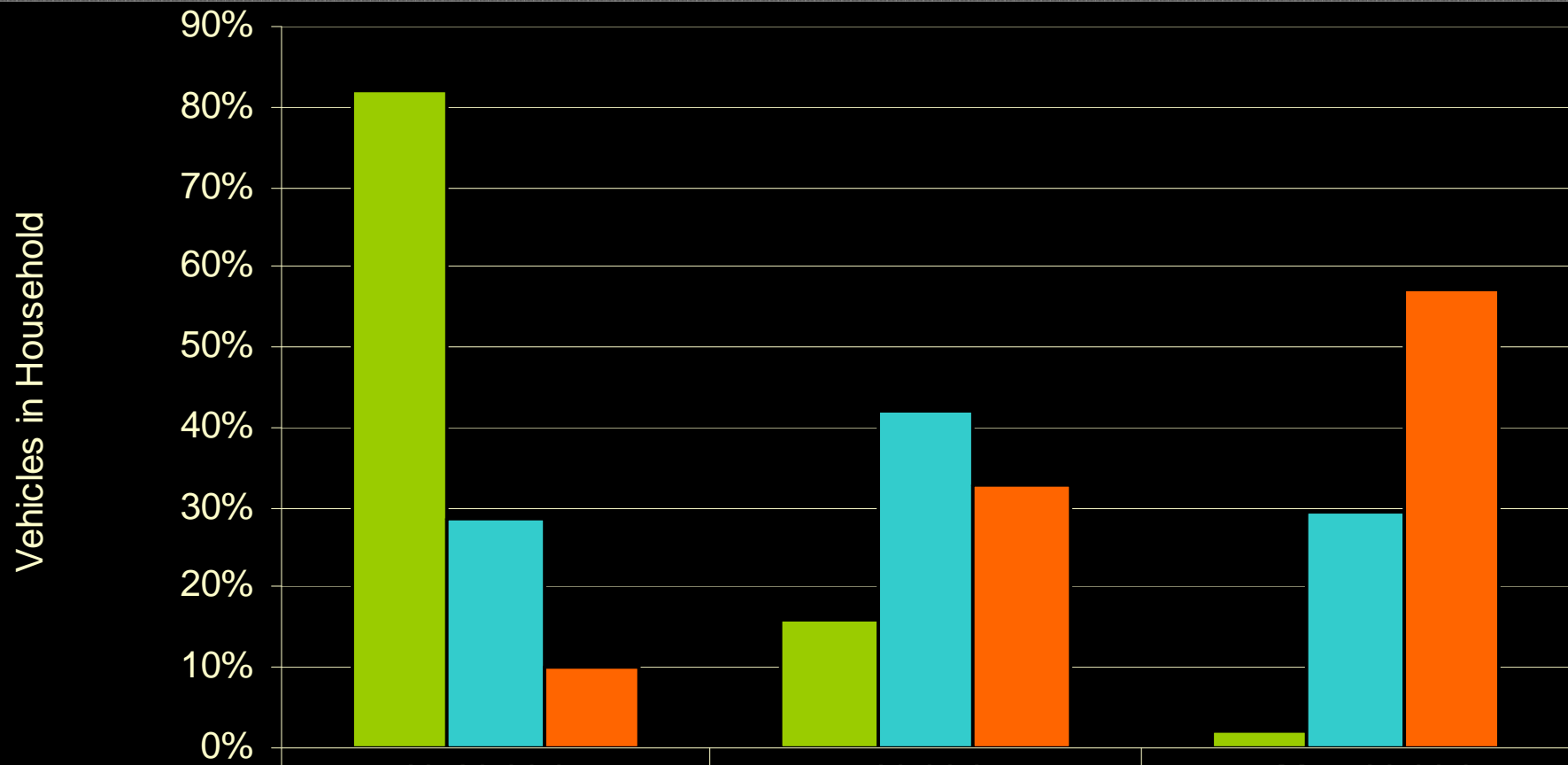


Language Isolation (2000)



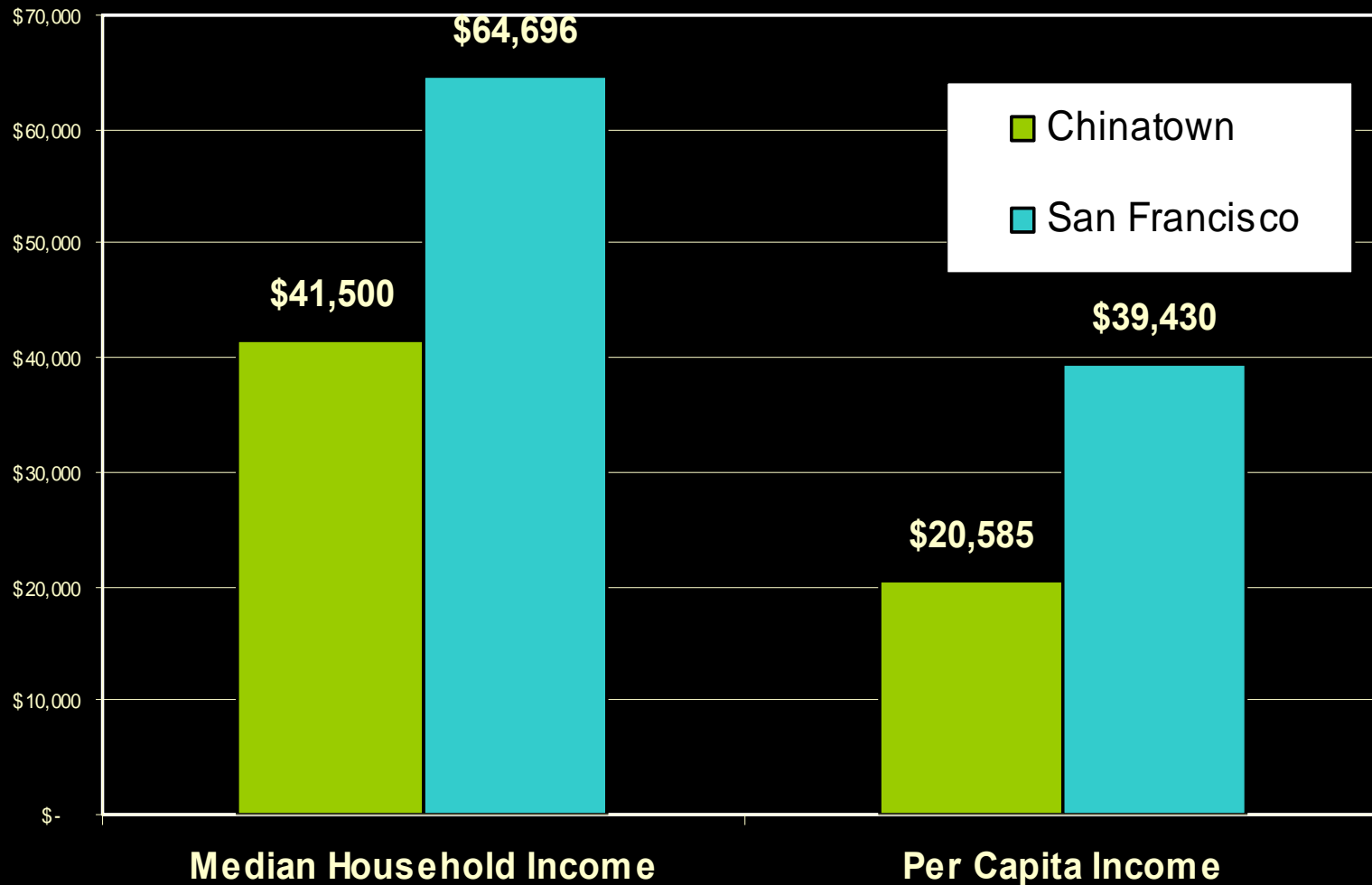
Source: U.S. Census, 2000.

Chinatown Locals: Vehicle Ownership



	No Vehicle	1 Vehicle	2 or More Vehicles
■ Chinatown	82%	16%	2%
■ San Francisco	29%	42%	29%
■ Bay Area	10%	33%	57%

Income (2007)¹



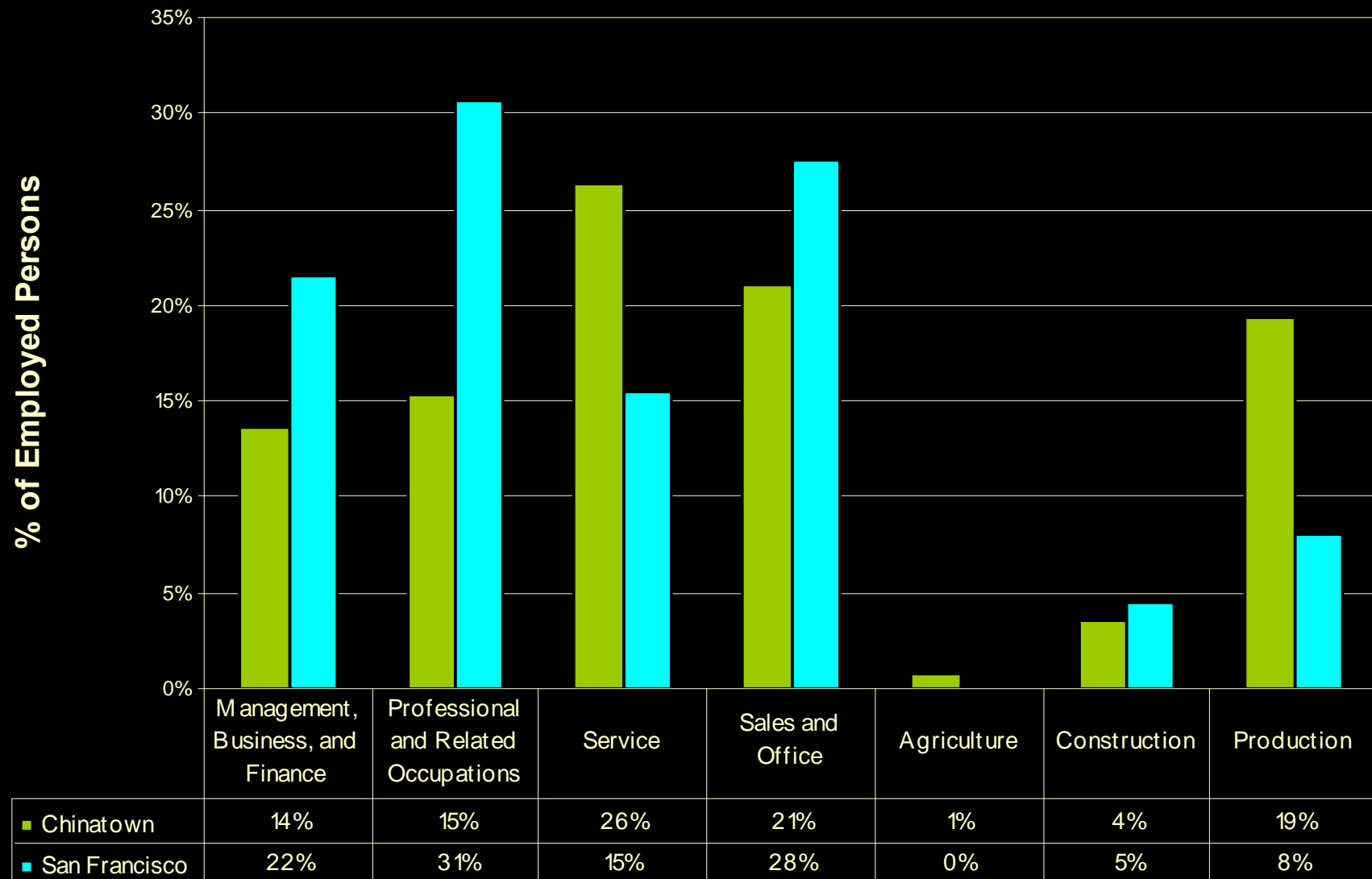
Source: Claritas, Inc; Social Compact, San Francisco Drilldown.

¹Chinatown household income estimates are higher than those reported by the census by accounting for unreported income and income generated through the informal economy as estimated through the San Francisco Drilldown report.

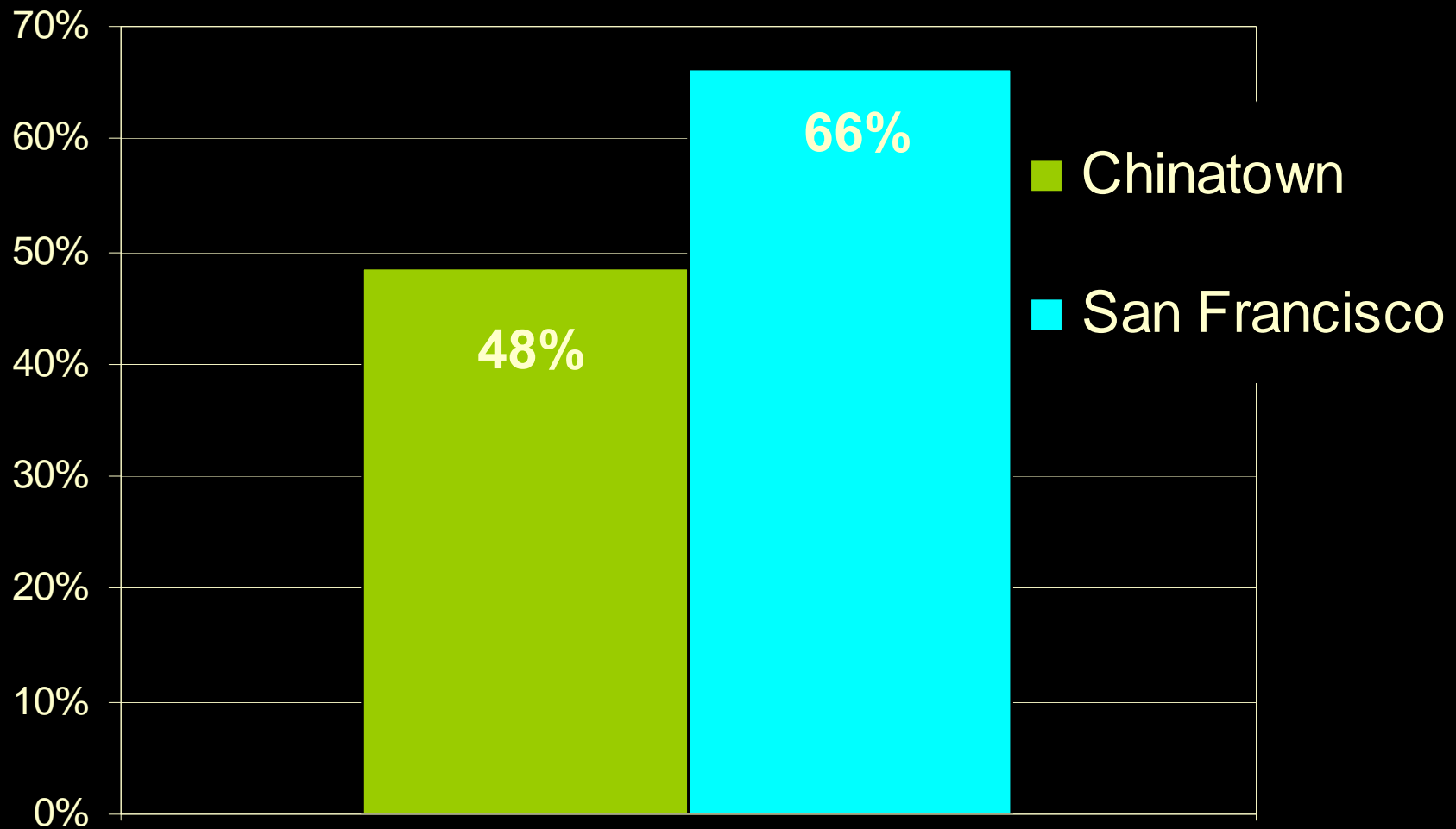
Mayor's Office of Economic and Workforce Development Programs

- **Neighborhood Marketplace Initiative**
 - **Grant-Funded Comprehensive Commercial Revitalization Program**
 - **In 8 low- to moderate-income commercial districts**
- **Community Benefit District Program**
 - **Property-owner/business-owner funded assessment district**
 - **Pays for improvements and maintenance in 8 neighborhoods**

Occupation (2000)



% of Persons¹ in the Workforce (2000)



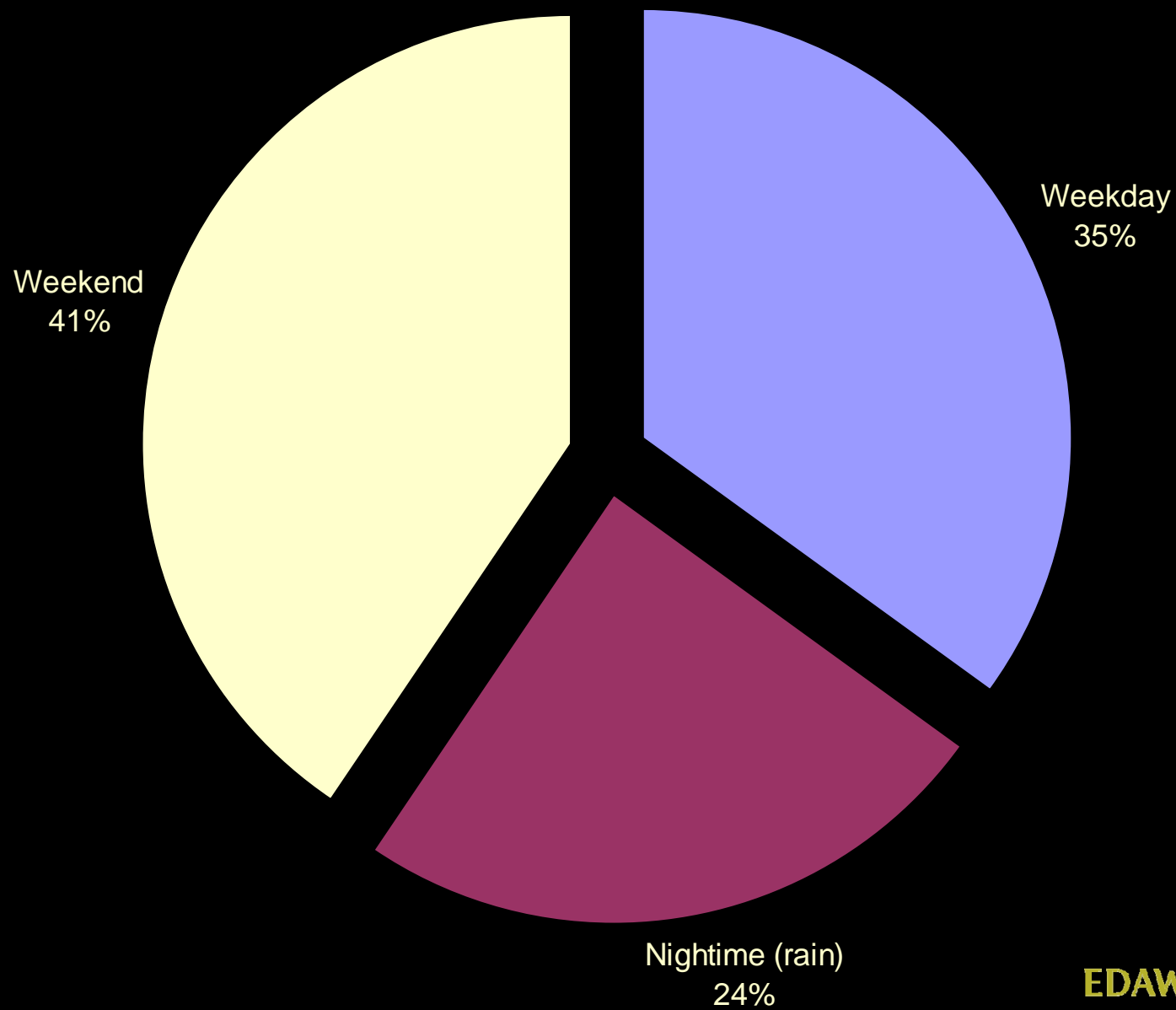
¹Based on persons over 16 years old.

Customer Survey

- Two teams performed street Customer Surveys from March 25th to 30th
 - Weekday, 11AM- 3PM
 - Weeknight, 5PM – 10PM
 - Weekend, 11AM – 3PM
- 46% Response Rate
- 143 Respondents
 - 71 Locals
 - 72 Visitors

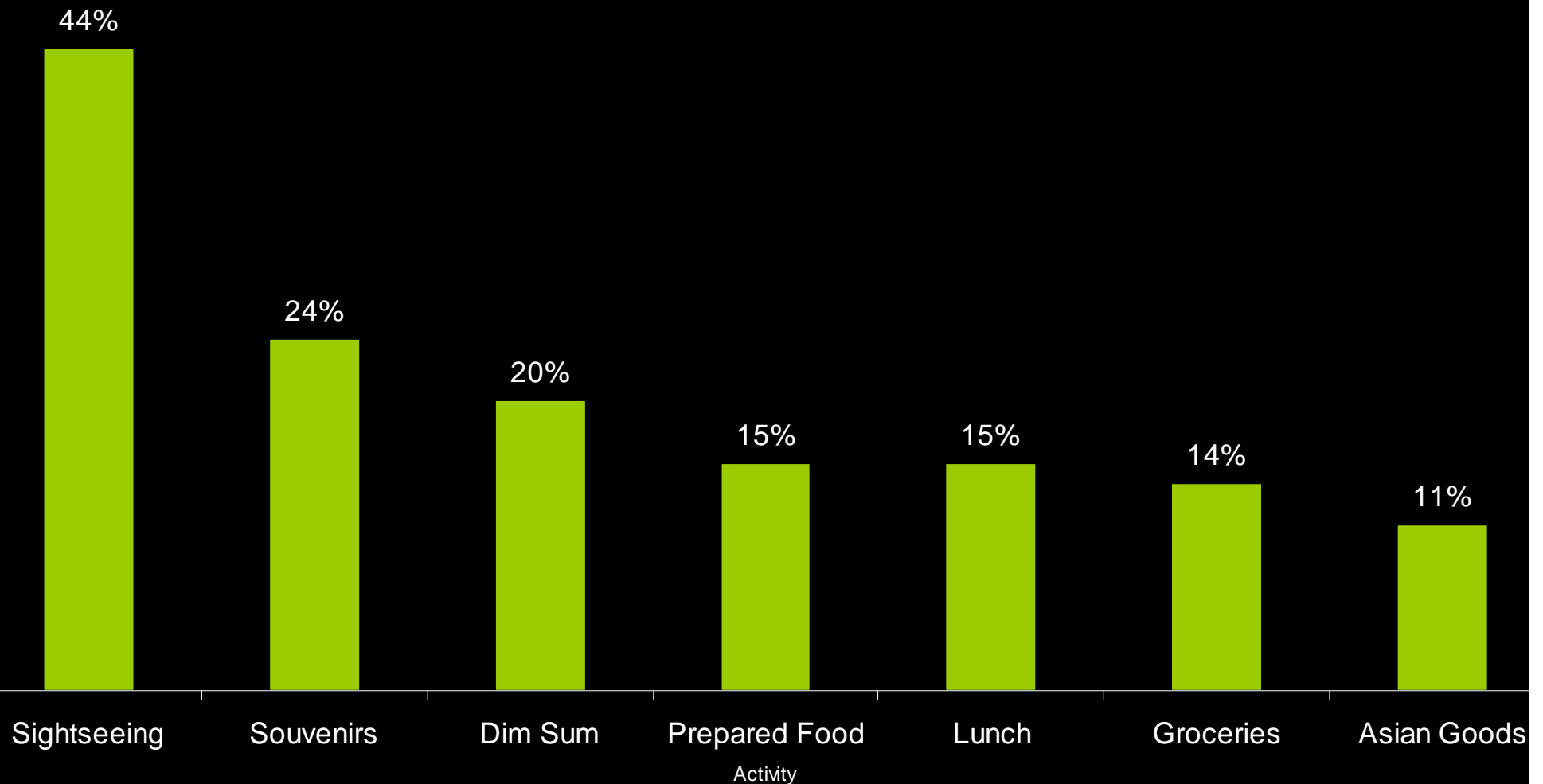


Respondents by Time of Day

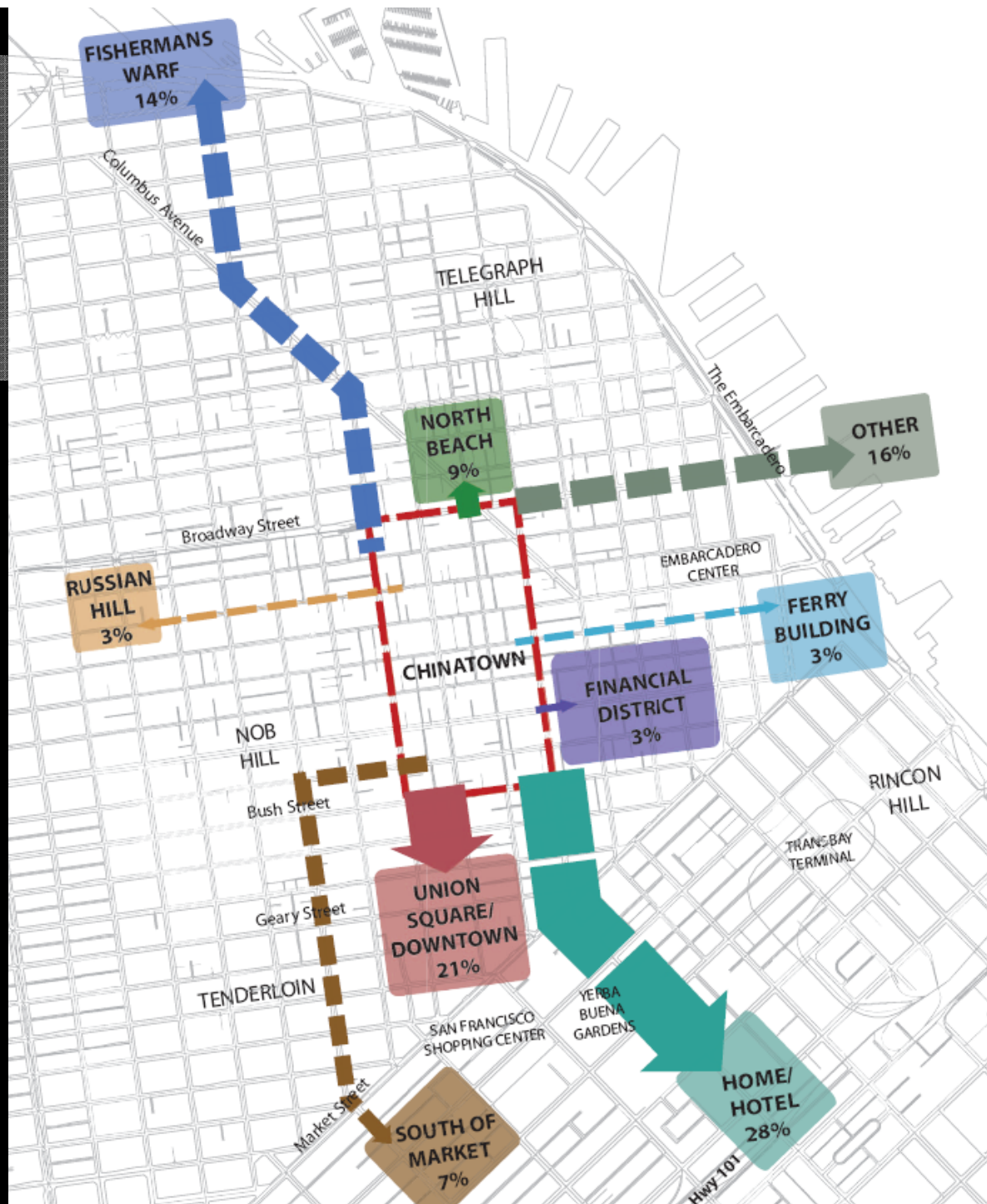


Visitors Coming for the Food and the Ambiance

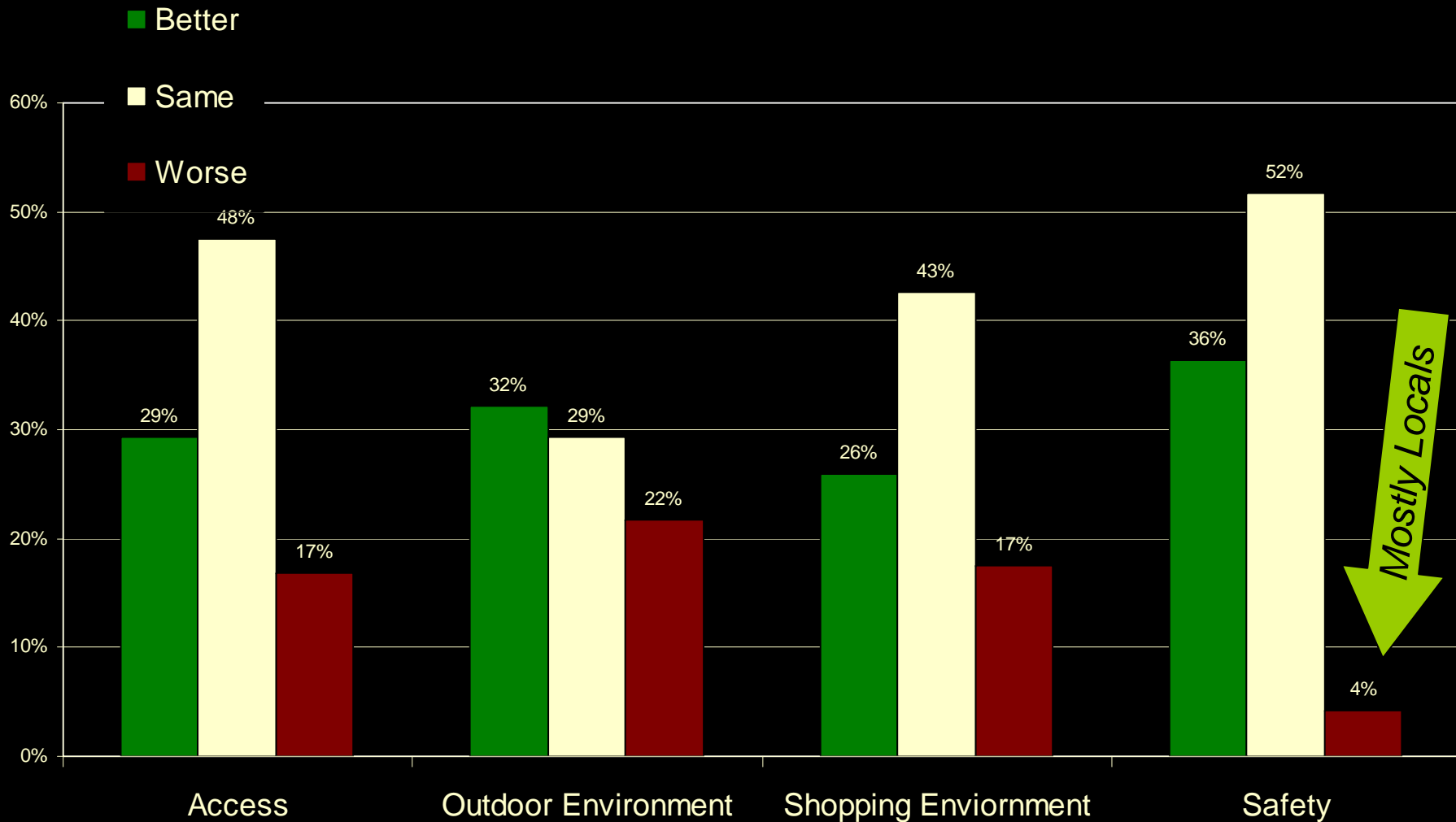
What are you doing while in Chinatown? (Top Seven Selections)



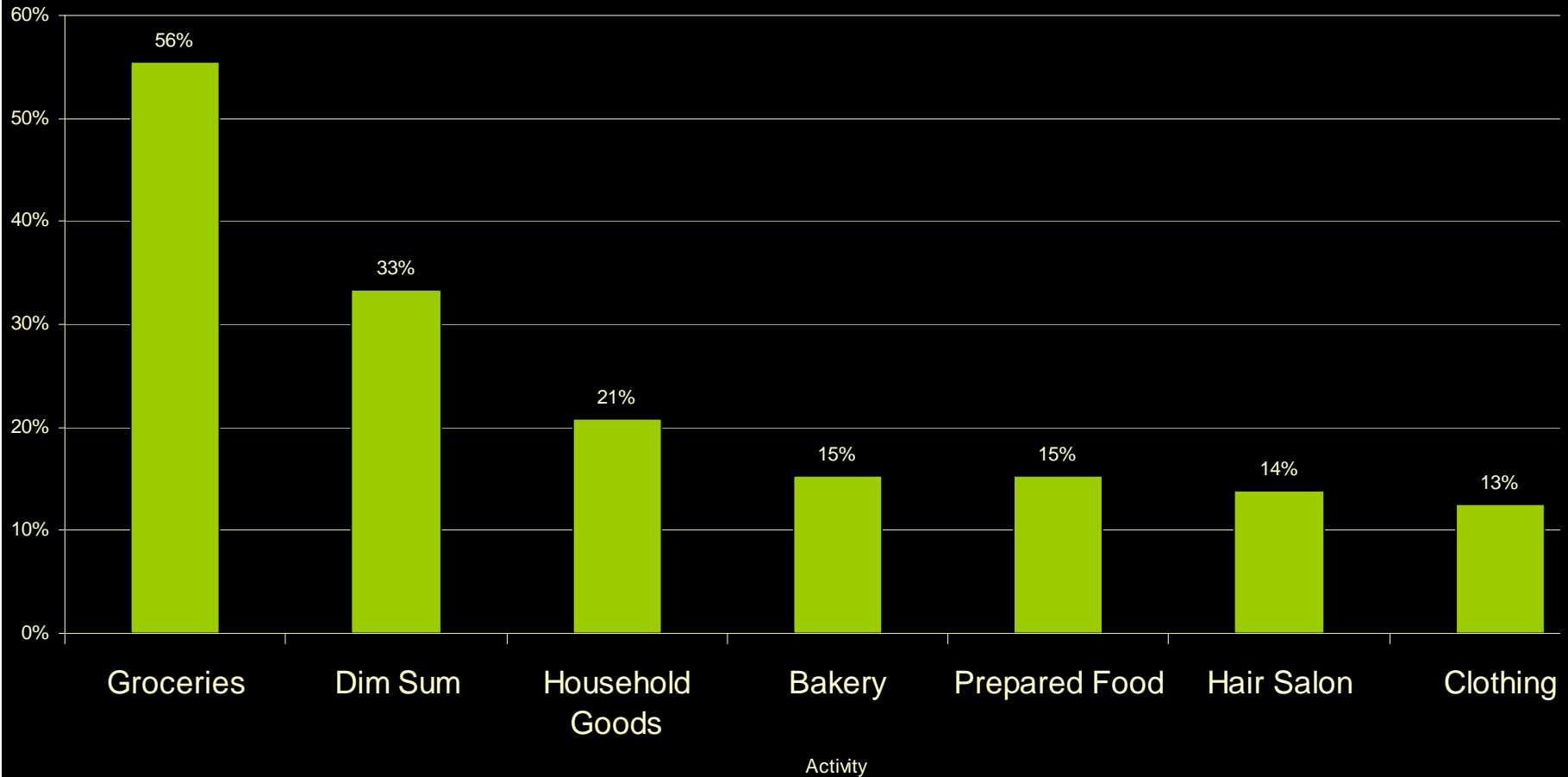
Customer Survey: Where are you going to next? (Visitors)



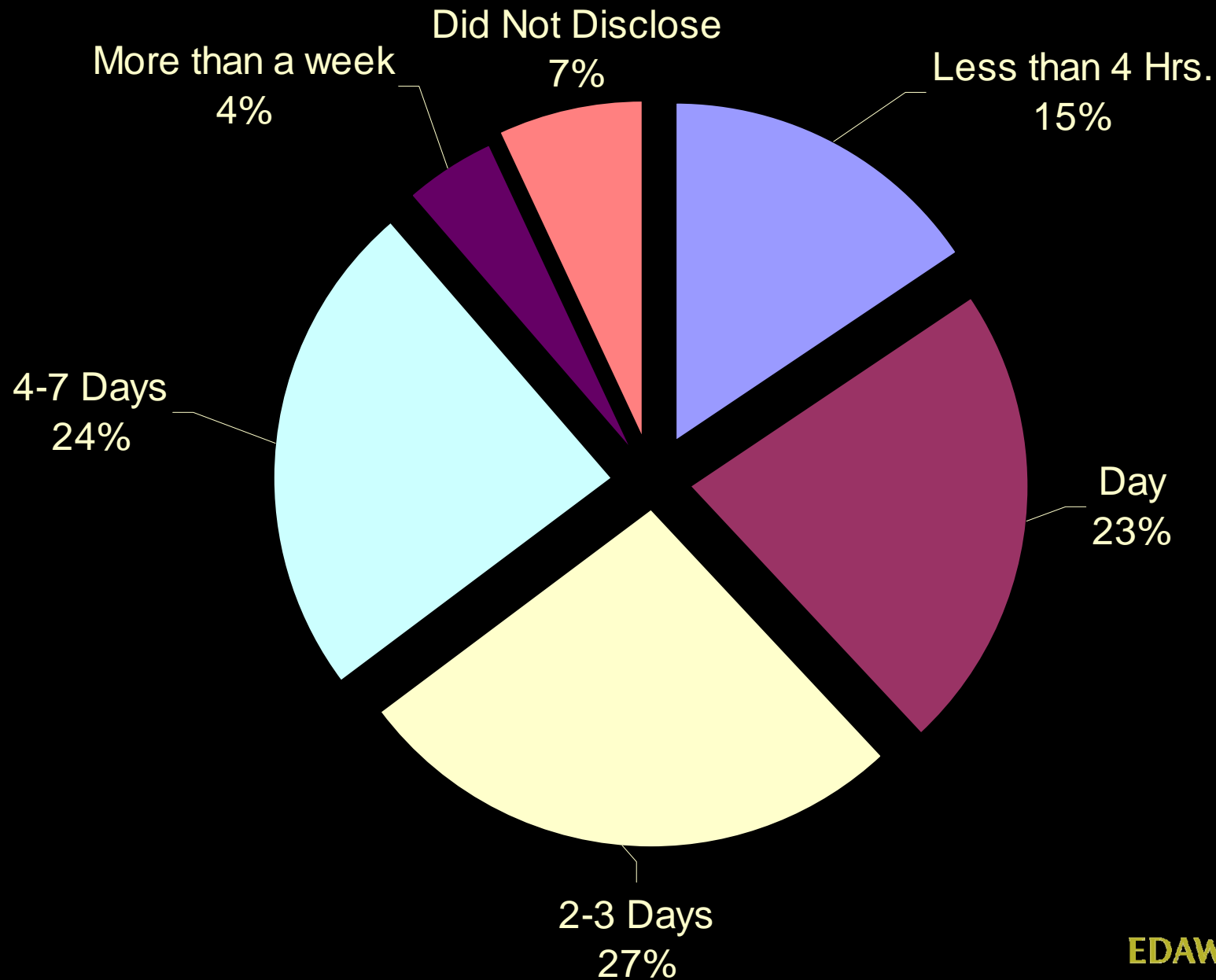
Customer Survey: How would you compare Chinatown to Other Areas of San Francisco?



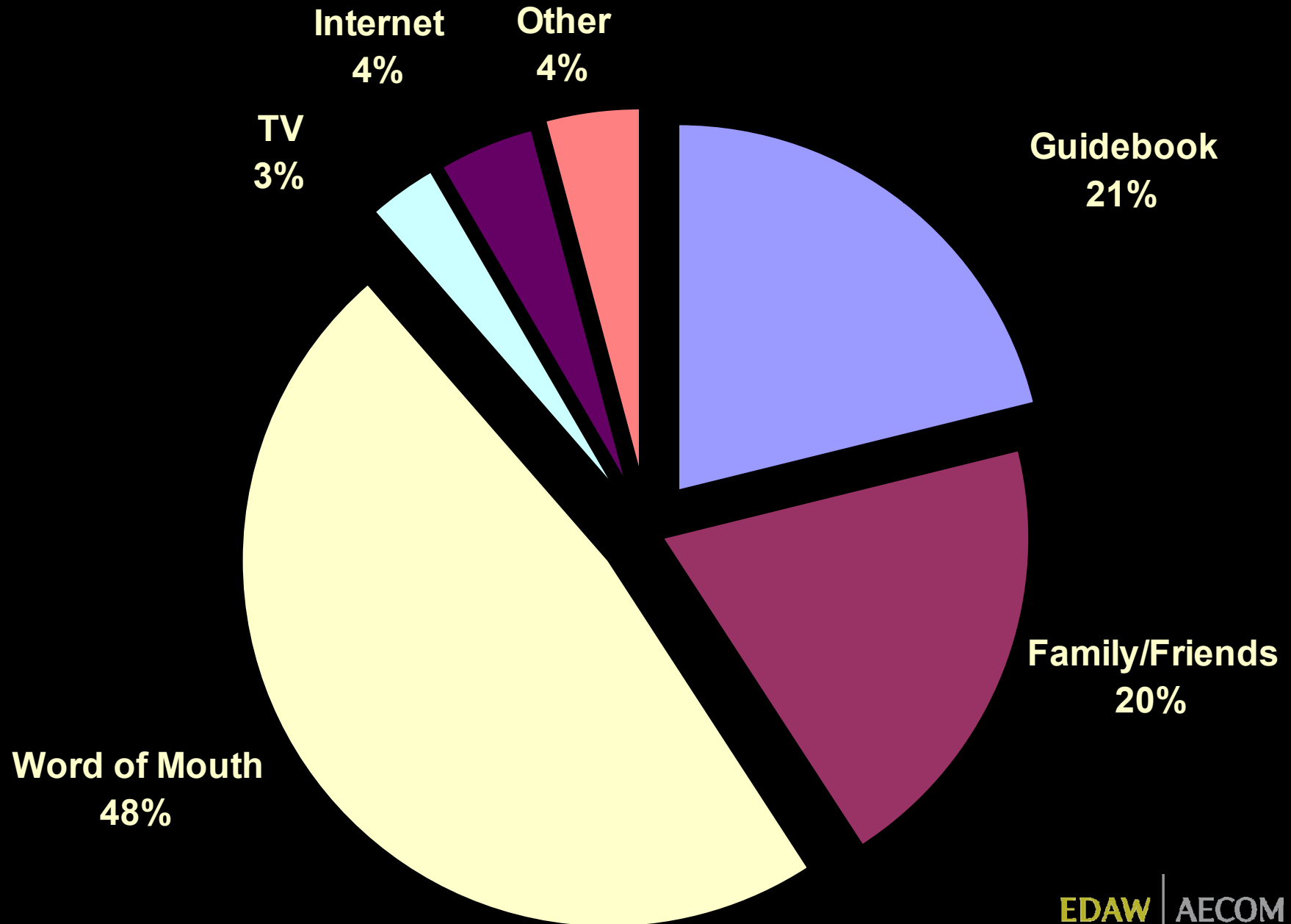
Locals Buying Daily Goods “What are you doing while in Chinatown?”



Length of Stay in San Francisco (Visitors)



Visitors: How did you hear about Chinatown?



Retail Vacancies, Grant Avenue

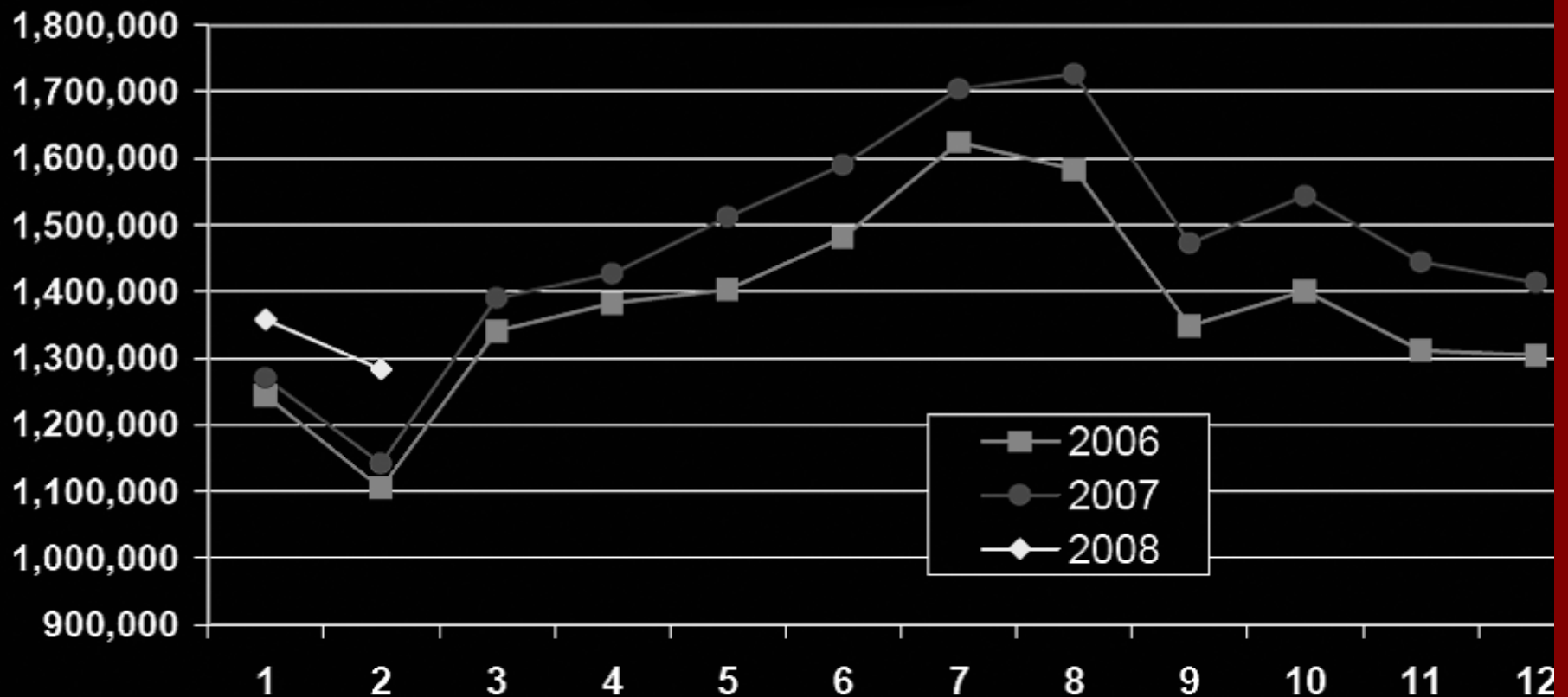
Survey of Grant Avenue Storefronts in April, 2008

- Four to five vacancies
- “Closing sales”
- Vacant buildings in disrepair on Washington Street



Air Traffic is Increasing at SFO

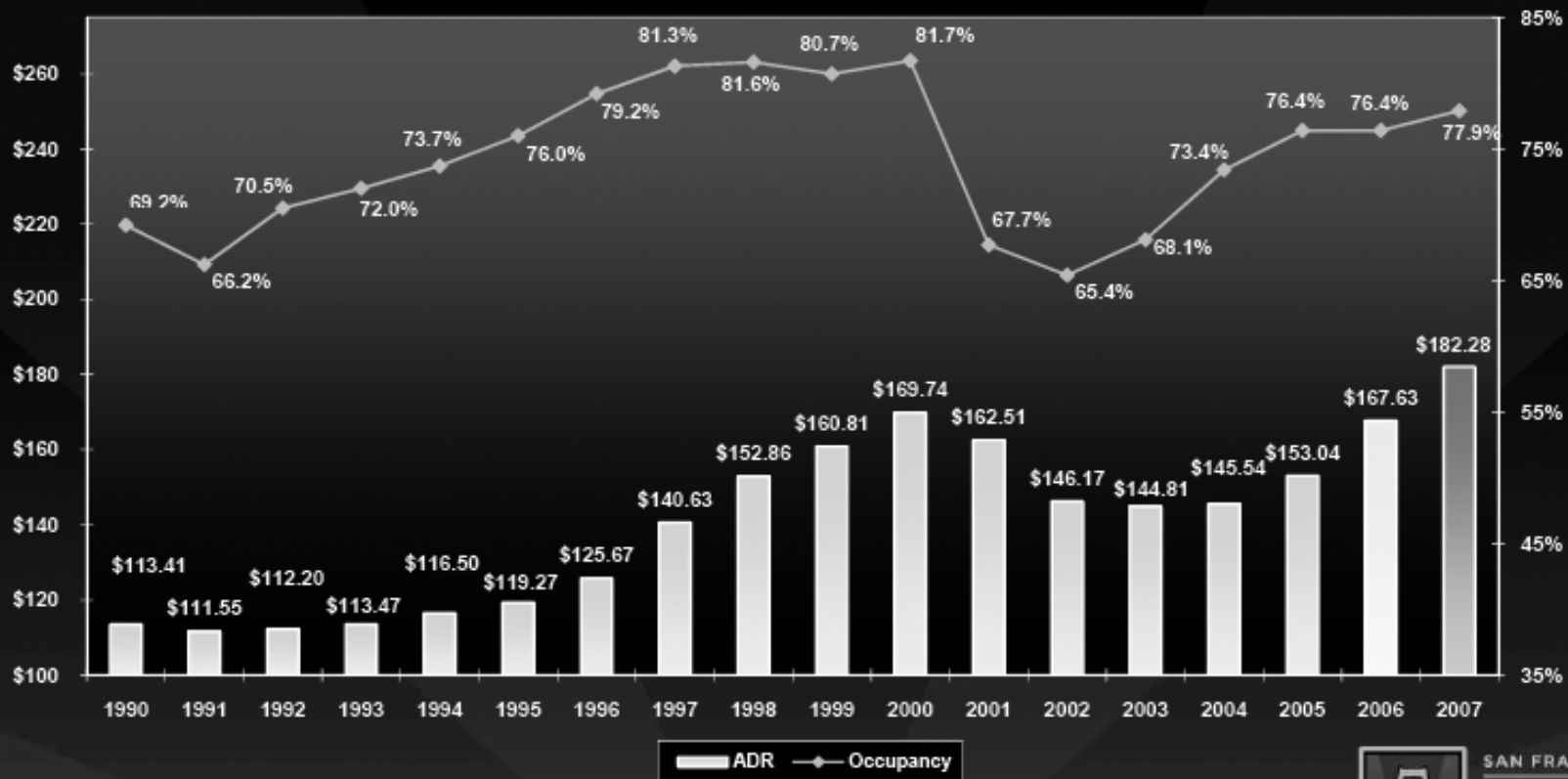
Total Deplanements at SFO 2006-2007



Source: San Francisco Visitor's & Convention Bureau

SF Hotel Conditions are Returning to Pre-2001 Occupancy and Rate Conditions

San Francisco Hotel Market Historical ADR and Occupancy



Source: PKF Consulting

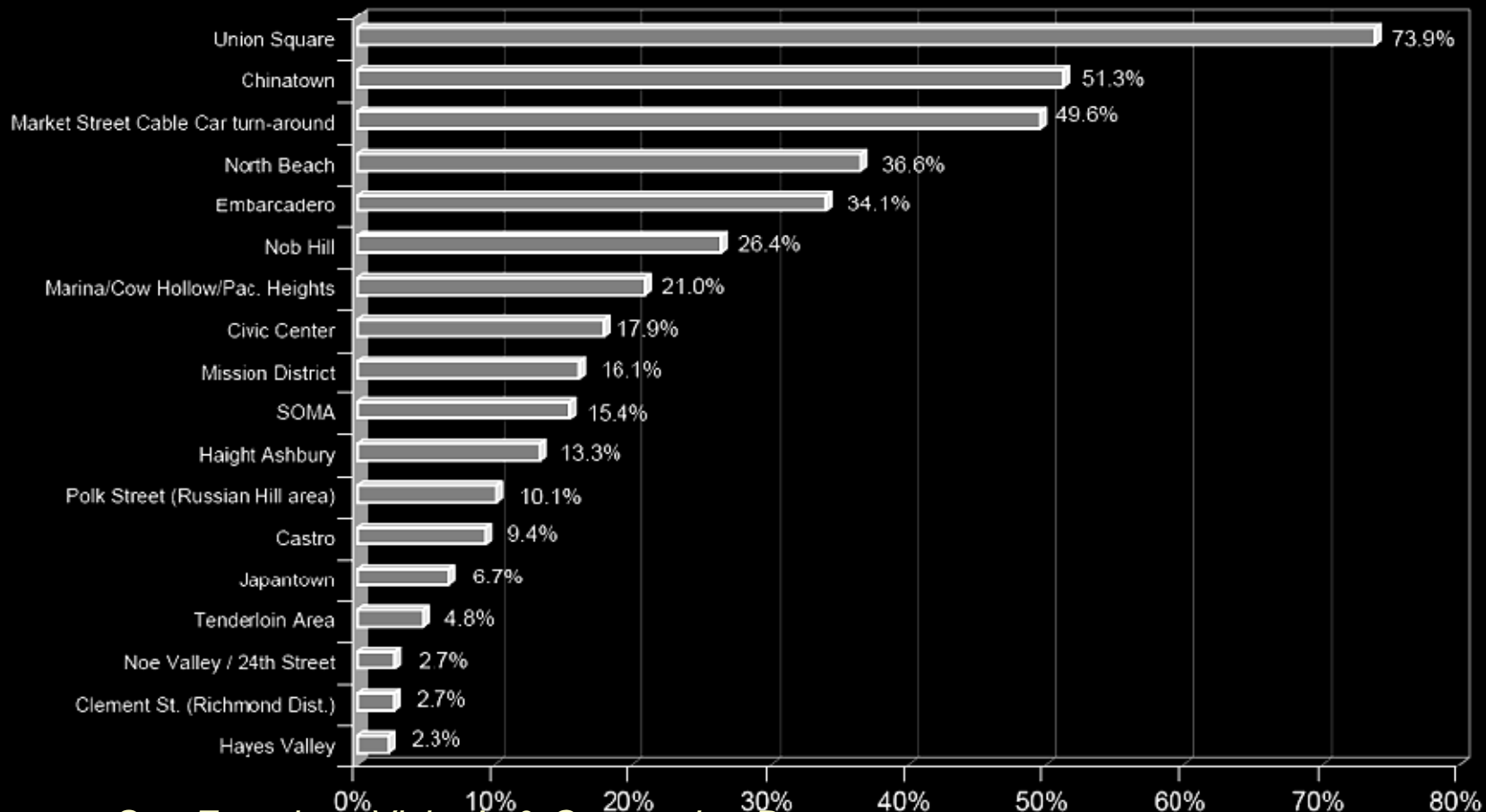


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FOUNDATION

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Chinatown is the second most visited area/neighborhood among hotel guests (2004)

Question: Which of the following local areas did you visit on your current trip?



Source: San Francisco Visitor's & Convention Bureau

Note: Fisherman's Wharf is defined as a destination in this study.

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Chinatown Economic Action Strategy

