

10.

SOUTH BAYSHORE



INTRODUCTION

SAN FRANCISCO
COMMERCE AND INDUSTRY

SAN FRANCISCO NEIGHBORHOOD PROFILES

SAN FRANCISCO PLANNING DEPARTMENT
1997

INTRODUCTION

This report describes population, labor force, zoning, land and property values, housing costs and densities, and business patterns and jobs in San Francisco's neighborhoods. For the purposes of this report, the city is divided into sixteen neighborhoods which define the structure of the report based on a profile per neighborhood (map on page vii). Each profile provides a comprehensive look at a distinct area within the city.

These data describe each neighborhood's resources as well as its contribution to the local economy. The profiles provide basic information for assessing the needs of a community, its strengths and deficiencies, and developing plans and programs to enhance the economic vitality of San Francisco's neighborhoods. The profiles will therefore be useful for many different organizations throughout the city including community development organizations, various government agencies, and neighborhood associations. Local businesses and merchant associations will also find these useful to better understand the dynamics of their surrounding communities.

The neighborhood profiles are a complement to the annual San Francisco Planning Department Commerce and Industry Inventory. While the Commerce and Industry Inventory provides some information for eleven districts comprised of zip code areas, it predominantly focuses on citywide data. Instead the purpose of this report is to provide basic information covering sixteen neighborhoods. These neighborhoods are either the same as or contained within the eleven districts in the Commerce and Industry Inventory. These profiles may also be used in conjunction with a second Planning Department publication, entitled "Business Revenues By Location", mapping concentrations of business gross receipts for major economic activities in San Francisco. Collectively, all of these reports provide information for the continuing work on the update of the Commerce and Industry Element of the General Plan.

While there are certain limitations within the information provided here, these profiles are the only comprehensive portrait of San Francisco's neighborhoods. There is very little information available at the San Francisco neighborhood level. Therefore, this report represents a special effort on the part of the Planning Department to provide the public with such valuable and unique information.

Definition of Neighborhoods

The division of neighborhoods, as mentioned above, is based on postal zip codes which are the smallest geographic unit for which much of the economic information is available. To the extent possible, population, community organization, and spatial cohesiveness have been reflected in the groupings of the zip codes. However, even within relatively small areas, San Francisco is a very diverse place. Two of the sixteen areas, Marina/Fillmore and Van/Ness Western Addition encompass very different communities which happen to fall within the same zip codes. The primary consideration in selecting the boundaries was to allow users to review population and land use characteristics as well as economic trends for each neighborhood area.

How the Profiles Are Organized

The indicators used in the profiles are divided into three sections (Population and Work Force, Land Use, Construction, Housing Costs and Densities, and Business Patterns and Jobs) which are defined in detail on page iii.

The Section on Population and Work Force contains tables on population, labor force, unemployment, and income by racial categories. It also includes tables on education, residents' occupations, and residents' industry of employment. Comparisons to Citywide patterns are provided on most of the tables. They may also be compared to the Citywide Profile on page 0.1.

The second section on Land Use, Construction, Housing Costs and Densities provides a more geographic description of a neighborhood. It includes tables describing land area, proportion of land used for open space, land use, as and property values. There is a table summarizing building permit applications by type of project. Finally, the housing tables describe vacancy and rental prices. Again, all the tables provide Citywide comparisons.

The section on Business Patterns and Jobs describes the economic vitality of the area. The tables cover types of business establishment, number of workers per business, gross receipts by business types and the average receipts per worker. As in the other sections, Citywide comparisons are included.

Data Sources

All population and workforce data is from the 1990 U.S. census.

Land use area and property value information is from the San Francisco Assessor's Office for 1996. Construction activity information is provided by the Department of Building Inspection for 1995. Housing indicators and median rental costs are from the 1990 U.S. census data. In addition, we have provided information about average rental costs in 1989 and estimated amounts for 1995 as indicated by Planning Department housing surveys.

Establishments and business gross receipts figures are provided by the San Francisco Office of the Tax Collector for 1995. These include all businesses except banks and insurance companies as they are exempt from filing local taxes. Therefore, the figures in the "Office" land use activity are underestimated for all districts. Employment levels broken down by land use activity are from the Employment Development Department for 1995 and County Business Patterns for 1993. Government agencies, including public schools, have not been included in any of the economic section because they do not file taxes, nor are they included in County Business Patterns employment data. The data on jobs in each district broken down by race is from the 1990 U.S. census.

We have provided the most recent economic data available. There is sometimes more recent economic data available at the citywide level, but it is not possible to accurately extrapolate that data down to the neighborhood level.

DEFINITIONS

INDICATOR DEFINITION

Population and Workforce:

Population	Number of people who had their primary residence in a specified area in 1990.
Labor Force	Number of people, 16 years old and over, employed or unemployed, but actively looking for work. Excludes members of the armed forces.
Unemployment	Number of people, 16 years old and over, unemployed but actively looking for work during the last four weeks, and willing to accept a job, or waiting to be called back to a job from which they have been laid off. This does not include people unemployed, but no longer looking for work, nor full-time students.
Education	The highest level of school completed or degree achieved.
Income	Median gross yearly wage or salary income, self-employment income, interests or dividends, social security income, public assistance income, retirement or disability income. The percentage figure is the percentage that each ethnicity earns proportional to the amount that ethnicity earns citywide. For example, African-Americans in the South Bayshore district earn a median income of \$21,647 which is 99% of the median that African-Americans earn citywide (\$21,857).
Residents' Occupation	Self-described occupation of employed persons, 16 years old and older, regardless of their industry of employment..
Residents' Industry	Self-described industry of employment of employed persons, 16 years old and older, regardless of their occupations.

Land Use, Construction, and Housing Costs and Density:

Gross Land Area	Total land area includes parcels, open space, sidewalks, and streets.
Open Space Land Area	Total open space area includes public parks and plazas. It does not include land at beaches.
Net Land Area	Total net area includes only parcels.
Land Use	This indicates the general land uses in each district. It matches the type of economic activity with a corresponding building structure, as well as the prevalent land use pattern. The categories are Office, Retail, Industrial, Cultural/Institutional, Hotel, Residential, and Public, Vacant, and Other. Some land uses are often paired with a second land use, indicating a mixed use area. Cultural/Institutional includes entertainment, artistic, health, and educational establishments. Public includes government institutions, public educational facilities, and public parks. Vacant includes all public and privately owned lots which are not currently being utilized.
Property Values	County assessed dollar value which includes the land, building, basement, and any permanent fixtures on the building.
Construction Activity	All building permit applications and associated costs for new construction, demolition, and remodeling filed in 1995.
Rental Costs	Median and/or average rental costs for a housing unit. These figures do not disaggregate rental costs by size of unit, number of bedrooms, or building type.

Business Patterns and Jobs:

Worker Spatial Density

Number of workers per thousand square foot of non-residential net land area, which includes land areas zoned Public (including open spaces), Industrial, Commercial, Neighborhood-Commercial, and Residential-Commercial mixed. It does not include the land area of city streets.

Establishments

All locations where business is conducted or where services or industrial operations are performed. A single company or owner may conduct operations or services at multiple locations, all of which are included. Not included in these figures are establishments that are exempt from paying local business taxes, such as banks, insurance companies, government agencies, various non-profit organizations, businesses earning less than \$2,500 a year, and those businesses that have failed to file taxes.

Gross Receipts

Gross receipts reported to the San Francisco Office of the Tax Collector of all businesses that are reported as establishments as outlined above. Dollar values are reported in thousands of 1995 constant dollars.

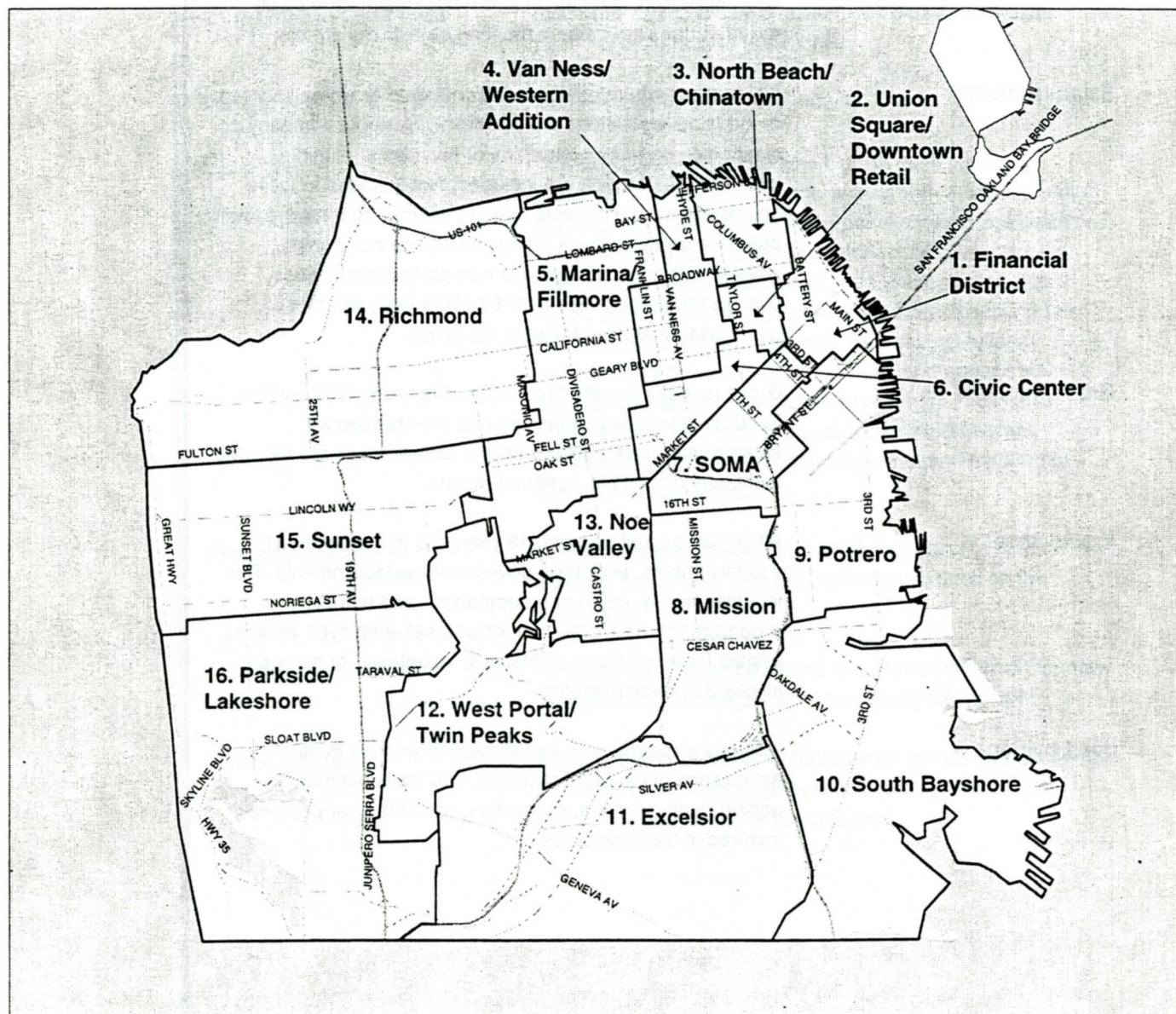
Employment

All civilian payroll workers, 16 years old and older, at all establishments, excluding government establishments. This includes banks, insurance companies, and non-profit organizations. This does not include self-employed persons, unpaid family workers, domestics, volunteers, or persons involved in trade disputes.

Jobs by Race

Includes all payroll and self-employed workers in all establishments in San Francisco. This does not include unpaid family workers, domestics, volunteers, or persons involved in trade disputes.

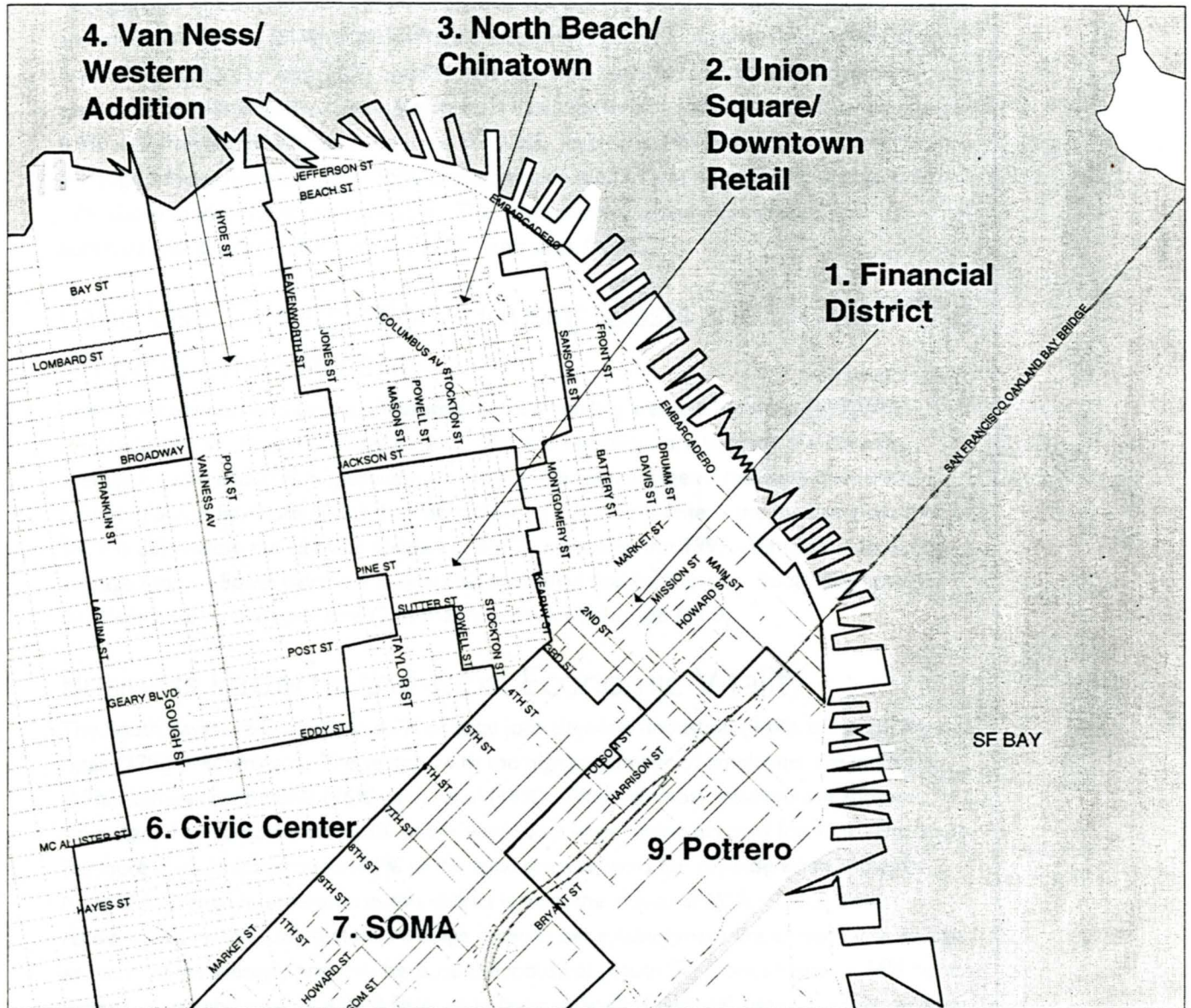
San Francisco Neighborhood Boundry Map



Source: San Francisco Planning Department



San Francisco Neighborhood Boundry Map



Source: San Francisco Planning Department



SOUTH BAYSHORE DISTRICT

Population and Work Force: The People

Four percent of San Francisco's population lives in the South Bayshore District. Most residents are African American (61%) or Asian/Pacific Islander (22%). The majority have an education level of high school or less (64%) and 9% have earned a bachelor's or advanced degree compared to 35% citywide. Unemployment is much higher at 13.3% than the citywide rate of 6.3% with the rate for African-Americans at 17.8%. Income is 24% below the citywide median, although African-Americans earn 99% of the citywide median and Asian/Pacific Islanders earn 17% above median for those ethnicities. The most common occupation groups are administrative support (26%), service (17%), and sales (10%).

Land Use, Construction, Housing Costs and Density: The Physical Environment

The most common land uses as measured by total building area are industrial (47%) and residential (44%). Property values for industrial and residential are beneath the citywide average by 16% and 20% respectively. A much higher percentage of residents own their homes in South Bayshore (53%) than do citywide (35%). For renters, the median gross rent of \$477 is 28% below the citywide median of \$662. However, the 1995 estimated market rate average rent for South Bayshore is only 6% lower than that for the city. South Bayshore has far fewer housing units per acre (2.9) than the citywide average (11.0).

Business Patterns and Jobs: Economic Vitality

The South Bayshore District has 4.7% of total jobs citywide. Industrial (43%), office (27%), and retail (27%) predominate. The sectors with the highest number of employees are industrial (57%), cultural/institutional (16%), and retail (14%). Although most residents are African-American, they comprise only 13% of the workforce while whites account for 45%. The South Bayshore District accounts for 6.1% of the total gross receipts for citywide establishments. Most of the revenue generated in this district is from the industrial (65% of total district receipts) and retail (20%) sectors. Average receipts per establishment are almost twice as high as the citywide average, primarily because the industrial (South Bayshore's figure is 74% higher than citywide) and retail (a 49% difference in favor of South Bayshore) uses. Average receipts per worker are also higher for these land uses by 30%.

South Bayshore District Profile

Population and Work Force Characteristics:

Population, 1990:

(Universe: District residents)

TOTAL	28,255	3.90% of the citywide total
White	2,559	9.06%
African-American	17,239	61.01%
Asian/Pacific Islander	6,123	21.67%
Hispanic *	2,258	7.99%
Other	76	0.27%

Labor Force, 1990:

(Universe: District residents, 16 and over)

TOTAL	11,435	2.77% of the citywide total
White	1,377	12.04%
African-American	6,564	57.40%
Asian/Pacific Islander	3,013	26.35%
Hispanic Origin **	847	7.41%
Other	481	4.21%
District residents who work in the district	1,413	12.36%

Unemployment, 1990:

(Universe: District residents within each ethnicity, 16 and over)

TOTAL	13.30% compared with the citywide rate of 6.3%
White	3.30%
African-American	17.80%
Asian/Pacific Islander	8.70%
Hispanic Origin **	8.10%

Education, 1990:

(Universe: District residents, 25 and over)

High school or less	63.63%
Some college, no degree	20.63%
Assoc. degree	6.51%
Bachelors	6.31%
Grad/Professional degree	2.92%

Income - in 1990 dollars:

(Universe: District household income within each ethnicity)

	Median	Percentage of Each Ethnicity's Citywide Median
TOTAL	\$25,485	76.27%
White	\$33,556	92.84%
African-American	\$21,647	99.04%
Asian/Pacific Islander	\$38,798	117.05%
Hispanic Origin **	\$29,533	98.33%
Other	\$28,070	94.66%

* Hispanic is considered as distinct racial category

** People of Hispanic-Origin are also included in all other racial categories

Residents' Occupation and Industry of Employment, 1990:

(Universe: District residents, 16 and over)

Occupations	All races	Percentage of Total
TOTAL	9,917	100.00%
Executive, administrative & managerial	898	9.06%
Professional specialty	690	6.96%
Technician & related support	210	2.12%
Sales	1,019	10.28%
Administrative support	2,550	25.71%
Private Household	80	0.81%
Protective Service	218	2.20%
Service, excluding private & protective	1,729	17.43%
Farming, forestry, & fishing	23	0.23%
Precision production, craft & repair	796	8.03%
Machine operators, assemblers & inspectors	642	6.47%
Transportation & material moving	609	6.14%
Handlers, equipment cleaners, helpers & laborers	453	4.57%

Industry	All races	Percentage of Total
TOTAL	9,925	100.00%
Agriculture, forestry & fisheries	34	0.34%
Mining	0	0.00%
Construction	569	5.73%
Manufacturing, nondurable goods	598	6.03%
Manufacturing, durable goods	406	4.09%
Transportation	1,355	13.65%
Communications & public utilities	289	2.91%
Wholesale trade	197	1.98%
Retail trade	1,708	17.21%
FIRE	887	8.94%
Business and repair services	699	7.04%
Personal services	466	4.70%
Entertainment & rec services	116	1.17%
Health services	769	7.75%
Education services	654	6.59%
Other professional services	664	6.69%
Public administration	514	5.18%

Land Use, Construction, Housing Costs and Density:**Land Use, 1996:***(Universe: District)*

Total Gross Land Area:	139 million square feet	10.71% of the citywide total
Total Open Space:	14 million square feet	5.83% of the citywide total open space
		10.00% of the district's total gross land
		18.39% is the citywide ratio of total open space to total gross land

Land Use and Land Area, 1996:*(Universe: District)*

General Land Use	Total Net Land Area (thousands of sq. feet)	Percentage of Total Net Land Area	Total Building Area (sq. feet)	Percentage of Total Building Area
TOTAL	56,004	100.00%	14,681,344	100.00%
Office	995	1.78%	348,580	2.37%
Retail	1,016	1.81%	374,002	2.55%
Industrial	22,751	40.62%	6,944,241	47.30%
Cultural/Institutional	648	1.16%	200,483	1.37%
Hotel	29	0.05%	10,416	0.07%
Residential	12,401	22.14%	6,525,415	44.45%
Residential/Retail	188	0.34%	227,703	1.55%
Public, Vacant, & Other	17,977	32.10%	50,504	0.34%

Property Values - in 1996 dollars:*(Universe: District)*

General Land Use	Total Assessed Value	Average Property Value per Sq Foot of Gross Building Area	Citywide Average
TOTAL	\$909,037,263	\$62	\$93
Office	\$30,072,687	\$86	\$106
Retail	\$29,535,911	\$79	\$97
Industrial	\$337,831,775	\$49	\$58
Cultural/Institutional	\$17,255,689	\$86	\$114
Hotel	\$1,395,461	\$134	\$106
Residential	\$479,863,034	\$74	\$92
Residential/Retail	\$13,082,706	\$57	\$86

Construction Activity - all costs in thousands of 1995 dollars:*(Universe: Building permit applications filed in 1995)*

Land Use	Total	Percentage of Citywide Land Use	Total Costs	Percentage of Citywide Land Use Costs	Average Cost of Building Permit Applications
TOTAL	528	2.55%	\$18,492	2.83%	\$35
Office	39	1.59%	\$965	0.60%	\$25
Retail	32	1.64%	\$1,299	1.40%	\$41
Industrial	45	18.22%	\$3,693	27.10%	\$82
Cult/Inst	21	4.17%	\$2,643	3.23%	\$126
Hotel	1	0.87%	\$154	0.93%	\$154
Residential	390	2.53%	\$9,738	3.47%	\$25
Other	0	0.00%	\$0	0.00%	\$0
Completed	88	1.31%	\$1,193	1.53%	\$14

Housing, 1990:*(Universe: District Housing Units)*

	Number of Units	Percentage District wide	Percentage Citywide
TOTAL	9,203	100.00%	2.80%
Occupied	8,600	93.45%	2.81%
Vacant	603	6.55%	2.63%
Owner-occupied	4,566	53.09%	4.33%
Renter-occupied	4,034	46.91%	2.02%

Housing Density, 1990:*(Universe: District residents)*

Housing Units	9,251	2.82% of citywide total
Housing Units per Acre	2.90	11.00 is the citywide average
Persons per Housing Unit	3.00	2.20 is the citywide average

Rental Costs - in 1990 dollars:*(Universe: Specified renter-occupied housing units)*

	Number of Units	Percentage District wide	Percentage Citywide
Total Rent			
TOTAL	3,991	100.00%	2.00%
Less than \$100	64	1.60%	8.07%
\$100 to \$199	620	15.53%	6.35%
\$200 to \$299	578	14.48%	5.94%
\$300 to \$399	483	12.10%	3.03%
\$400 to \$499	343	8.59%	1.51%
\$500 to \$599	452	11.33%	1.78%
\$600 to \$699	350	8.77%	1.39%
\$700 to \$749	155	3.88%	1.23%
\$750 to \$999	591	14.81%	1.29%
\$1,000 or more	330	8.27%	1.22%
No cash rent	25	0.63%	0.57%

Median Gross Rent \$477 compared with citywide median of \$662
(Including rent controlled units)

1989 Average Market Rate Rent \$770 compared with citywide average of \$819
(This figure represents the average cost for units that were vacant at the time of this survey. It does not include rent controlled units.)

1995 Estimated Market Rate Rent \$924 compared with citywide average of \$983
(It is estimated that two bedroom rental costs in San Francisco have risen by 20%, on average since 1989. This figure represents the estimated 1995 average cost, assuming that there has been an equal proportional increase across the city in building type and unit size.)

Business Patterns and Jobs:**Worker Spatial**

Density: 0.89 Workers per thousand sq. feet of non-residential net land area
3.37 is the citywide average

Establishments, 1995:*(Universe: District establishments)*

Land Use	Total Number	Percentage of Total District Establishments	Percentage of Citywide Establishments
TOTAL	1,529	100.00%	3.77%
Office	413	27.01%	2.63%
Retail	406	26.55%	2.78%
Industrial	664	43.43%	10.35%
Cult/Inst	45	2.94%	1.36%
Hotel	1	0.07%	0.19%

Land Use	Average Number of Workers Per Establishment	Citywide Average Per Establishment
TOTAL	15	12
Office	7	11
Retail	8	6
Industrial	20	17
Cult/Inst	79	26
Hotel	24	43

Gross Receipts - in thousands of 1995 dollars:*(Universe: District establishments)*

Land Use	Total Receipts	Percentage of Total District Receipts	Percentage of Citywide Receipts
TOTAL	\$1,654,059	100.00%	6.05%
Office	\$183,642	11.10%	1.67%
Retail	\$322,677	19.51%	4.16%
Industrial	\$1,077,397	65.14%	17.84%
Cult/Inst	\$70,282	4.25%	4.58%
Hotel	\$61	0.00%	0.01%

Land Use	Average Receipts Per Establishment	Citywide Average Per Establishment	Average Receipts Per Worker	Citywide Average Per Worker
TOTAL	\$1,082	\$556	\$73	\$56
Office	\$445	\$702	\$64	\$63
Retail	\$795	\$532	\$98	\$84
Industrial	\$1,623	\$932	\$83	\$54
Cult/Inst	\$1,562	\$463	\$20	\$18
Hotel	\$61	\$1,912	\$3	\$44

Employment by Land Use, 1993:*(Universe: Payroll Workers 16 and over)*

Land Use	Total Number	Percentage of Total District Jobs	Percentage of Citywide Jobs
TOTAL	22,752	100.00%	4.65%
Office	2,874	12.63%	1.65%
Retail	3,293	14.48%	3.55%
Industrial	12,961	56.97%	11.64%
Cult/Inst	3,553	15.62%	4.12%
Hotel	24	0.11%	0.10%
Government	N/A	N/A	N/A
Other	46	0.20%	3.29%

Jobs by Race, 1990:*(Universe: District jobs, 16 and over)*

TOTAL	31,283	5.51% of the citywide total
White	13,989	44.72%
African-American	4,077	13.03%
Hispanic *	5,004	16.00%
Other	8,213	26.25%

* Hispanic is considered as a distinct racial category

** People of Hispanic-Origin are also included in all other racial categories

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Planning Commission

Susan Lowenberg, President
Hector Chinchilla, Vice President
Esther Marks
Lawrence B. Martin
Beverly Mills
Dennis A. Antenore
Cynthia Joe

Planning Department

Gerald Green, Planning Director
Amit Ghosh, Chief of Comprehensive Planning
Inge Horton, Senior Planner

Project Manager: Miriam Chion
Project Team: Rachel Goldberg, Michele Montoya,
Lois Scott, Catherine Bauman

Technical Support: Scott Dowdee, Alton Chinn,
Mickey Hillmon, Micheal Sanders
Pamelia Maxwell

Photographs: Jim Bergdoll, Rachel Goldberg, Neil Hart,
Michele Montoya, Cheryl Parker

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William Huang, PhD Student, University of California
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