

EXISTING CONDITIONS REPORT

**EXCELSIOR
OUTER MISSION**

NEIGHBORHOOD STRATEGY

PROJECT TEAM



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To be completed.

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EXECUTIVE SUMMARY

To be completed.

DRAFT

To be completed.

CHAPTER 1

ASSETS & CHALLENGES



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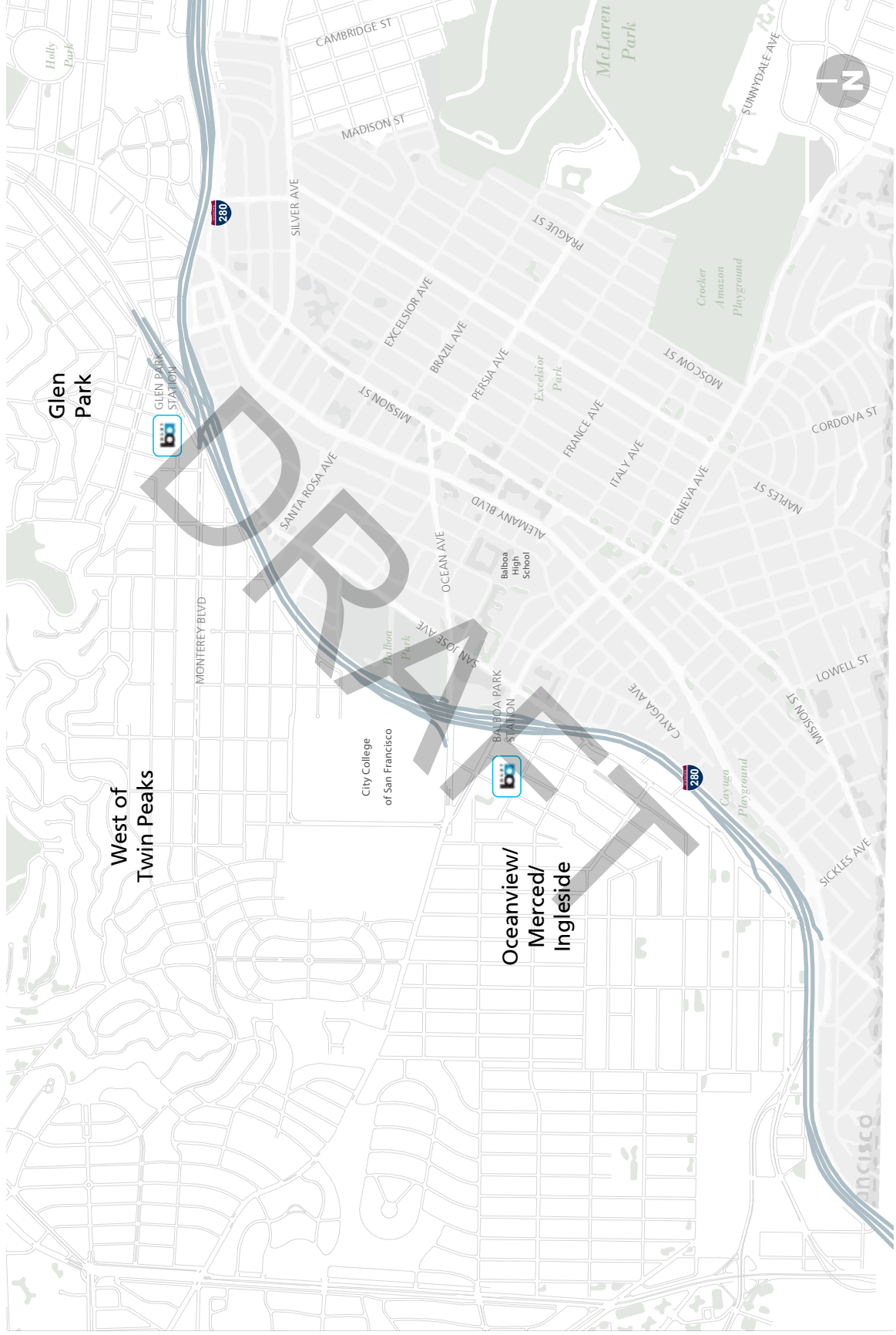
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CHAPTER 2

PEOPLE

PROJECT AREA



DEMOGRAPHICS

Population

POPULATION

63,620

vs. 840,770 citywide

POPULATION GROWTH

4.9%

from 2010 to 2015

Households & Families

HOUSEHOLDS

17,610

vs. 353,290 citywide

FAMILY HOUSEHOLDS

13,400

HOUSEHOLDS 2015

Average household size	3.6
Average family household size	4.2
Percent family household size	76.1%
Percent family household size - citywide	46%

Source: US Census Bureau

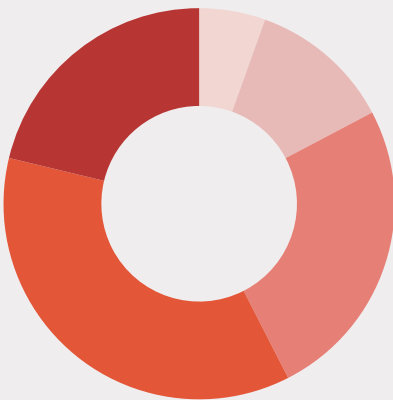
Age

MEDIAN AGE

41.1

vs. 39.9 citywide

Figure 1-X



AGE	2015
0-4 years	5%
5-17 years	12%
18-34 years	25%
35-59 years	36%
60 and over	21%

Source: US Census Bureau

Foreign Born

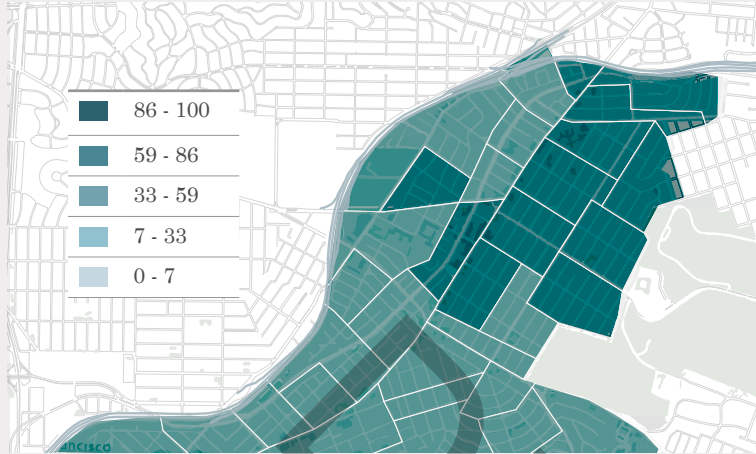
FOREIGN BORN

52.9%

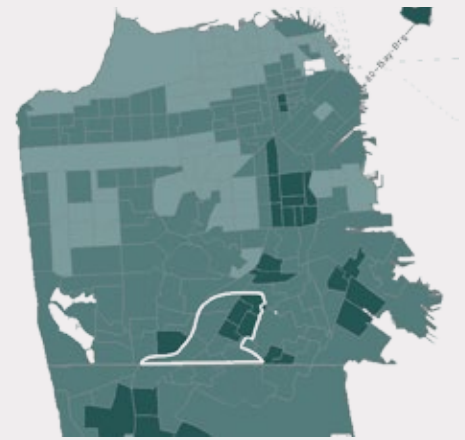
Ethnicity & Race

Map 1

ETHNIC DIVERSITY INDEX, 2016



Source: 2016 USA Diversity Index

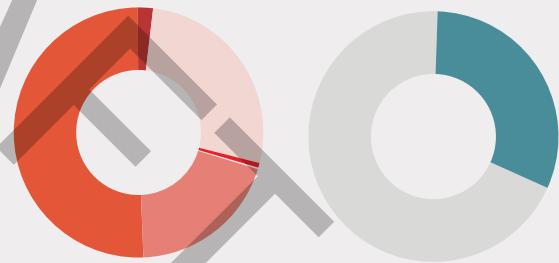


% chance that two people, chosen at random from this area, belong to different race or ethnic groups

RACE/ETHNICITY

Black	2%
Asian	51%
Other/Two or more races	20%
Native Hawaiian Pacific Islander	0%
Native American	1%
White	27%
% Latino	31%

Source: American Community Survey



Language

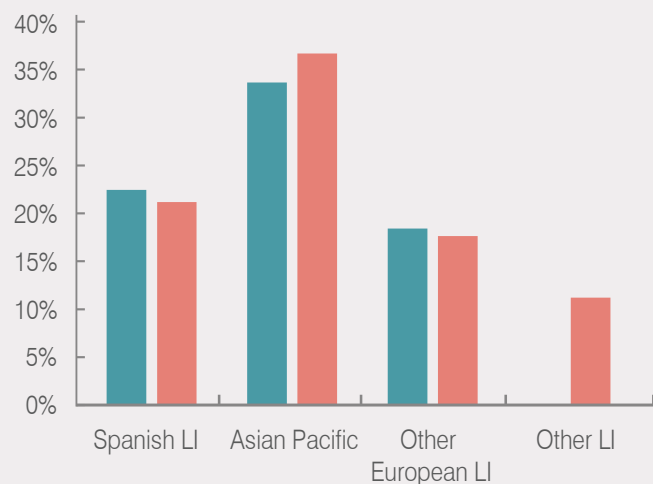
LINGUISTICALLY ISOLATED

20.9%

vs. 12.4% citywide

LINGUISTICALLY ISOLATED	2015	CITYWIDE
Spanish LI	23%	21%
Asian Pacific Island LI	34%	37%
Other European LI	19%	18%
Other LI	0%	11%

Source: US Census Bureau



Income & Poverty

POVERTY

9%

vs. 13% citywide

MEDIAN HOUSEHOLD INCOME

\$70,610

vs. \$81,950 citywide

PER CAPITA INCOME

\$28,020

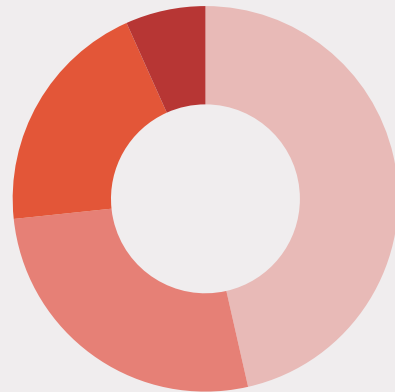
MEDIAN FAMILY INCOME

\$73,320

vs. \$96,730 citywide

Education

Map 1-X



EDUCATIONAL ATTAINMENT	2015	CITYWIDE
High school or less	46%	26%
Some college AA degree	27%	20%
College degree	20%	33%
Graduate professional degree	7%	21%

Source: US Census Bureau

Employment of Residents in Project Area

UNEMPLOYMENT RATE

9%

vs. 7% citywide

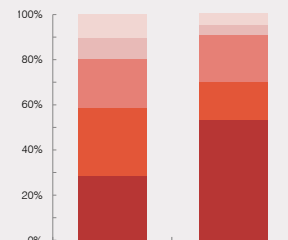
UNEMPLOYMENT RATE BY GENDER

8% for females

10% for males

Figure 1-X

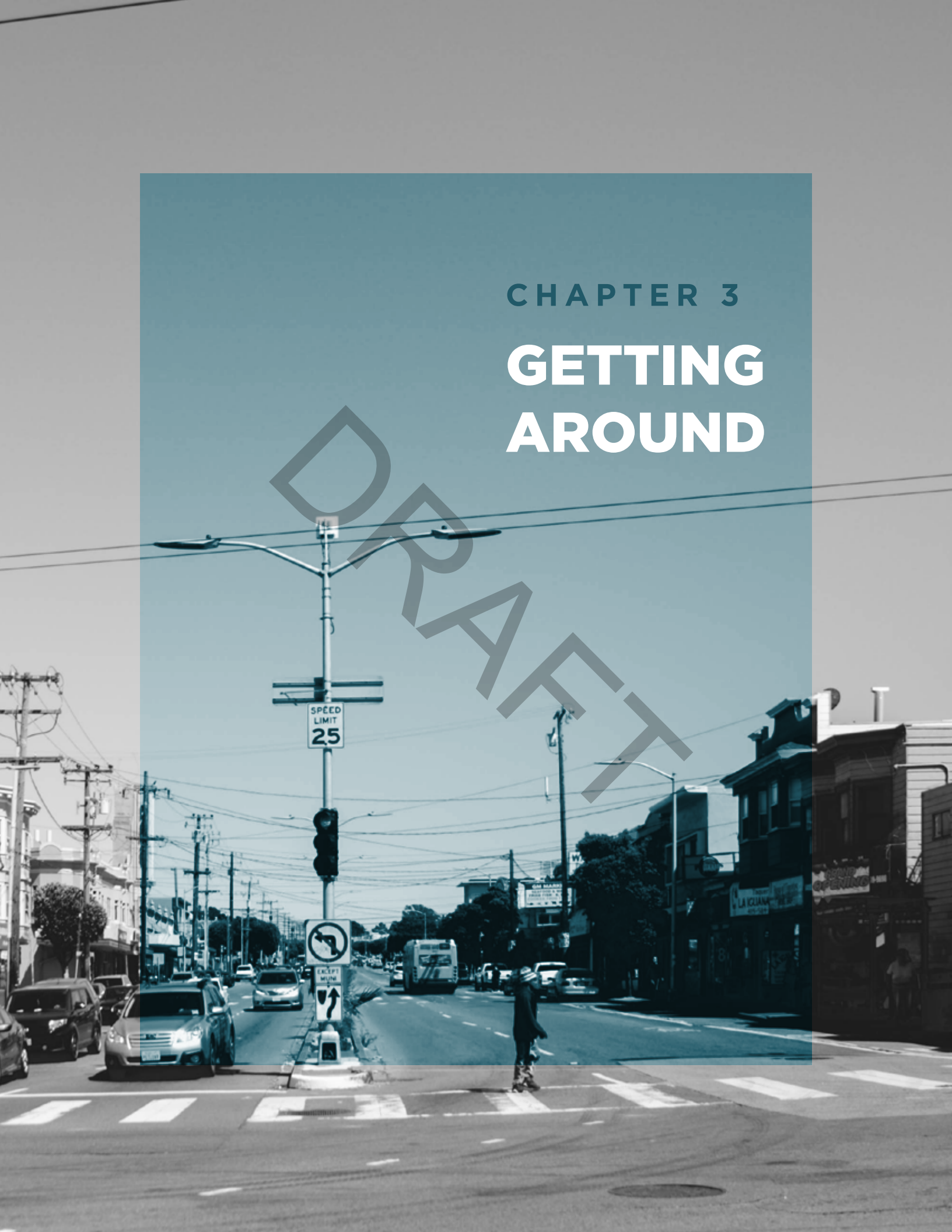
EMPLOYMENT OF RESIDENTS BY SECTOR	2015	CITYWIDE
Product Transport and Material Moving	11%	5%
Natural Resources Construction and Maintenance	9%	4%
Sales and Office	22%	21%
Services	30%	17%
Managerial and Professional	28%	53%



Source: US Census Bureau

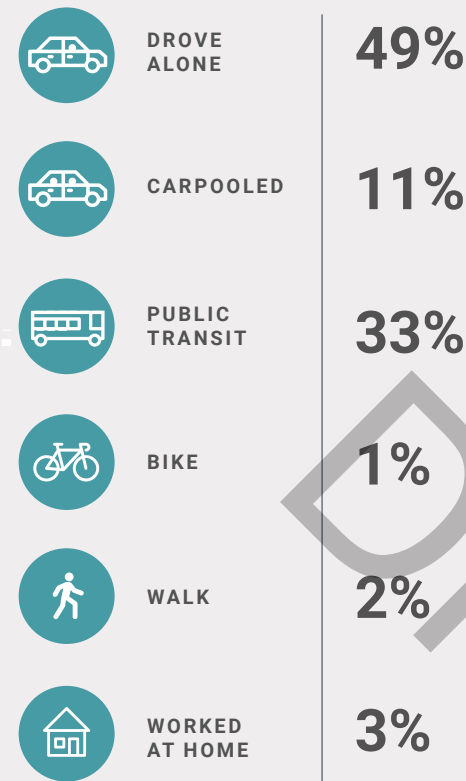
CHAPTER 3

GETTING AROUND



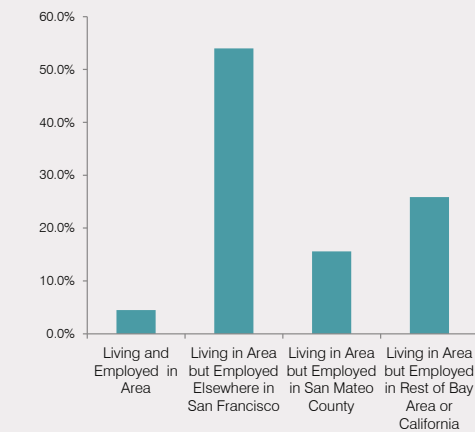
Transit Modes

COMMUTE TO WORK



Source: US Census Bureau

Figure 2-X



EXCELSIOR/OUTER MISSION COMMUTE SHED

Employed residents in area	32,866	-
Living and employed in area	1,495	4.5%
Living in area but employed elsewhere in San Francisco	17,750	54.0%
Living in area but employed in San Mateo county	5,118	15.6%
Living in area but employed in rest of Bay Area or California	8,503	25.9%

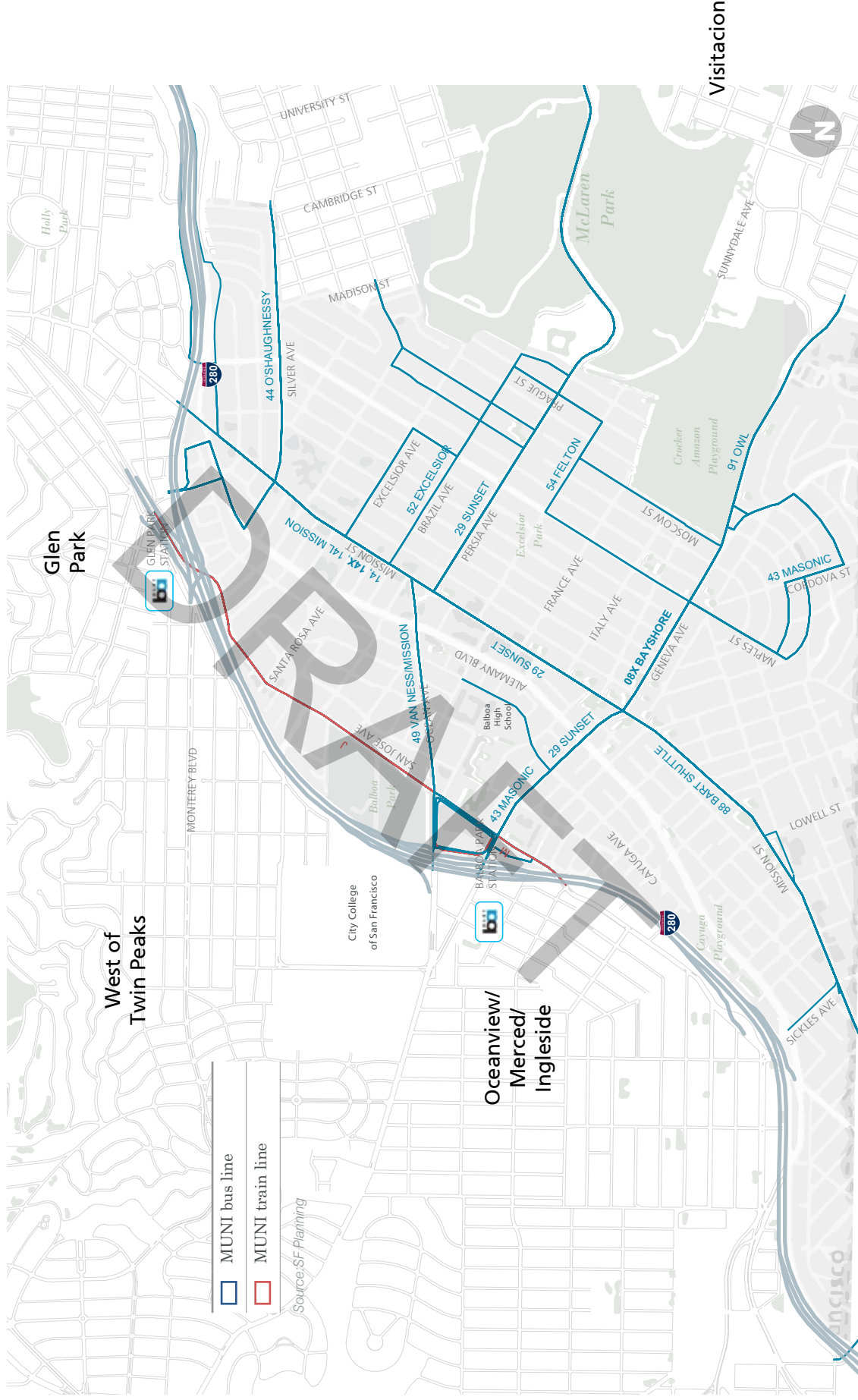
Source: US Census American Community Survey 2011-2015

BART Ridership

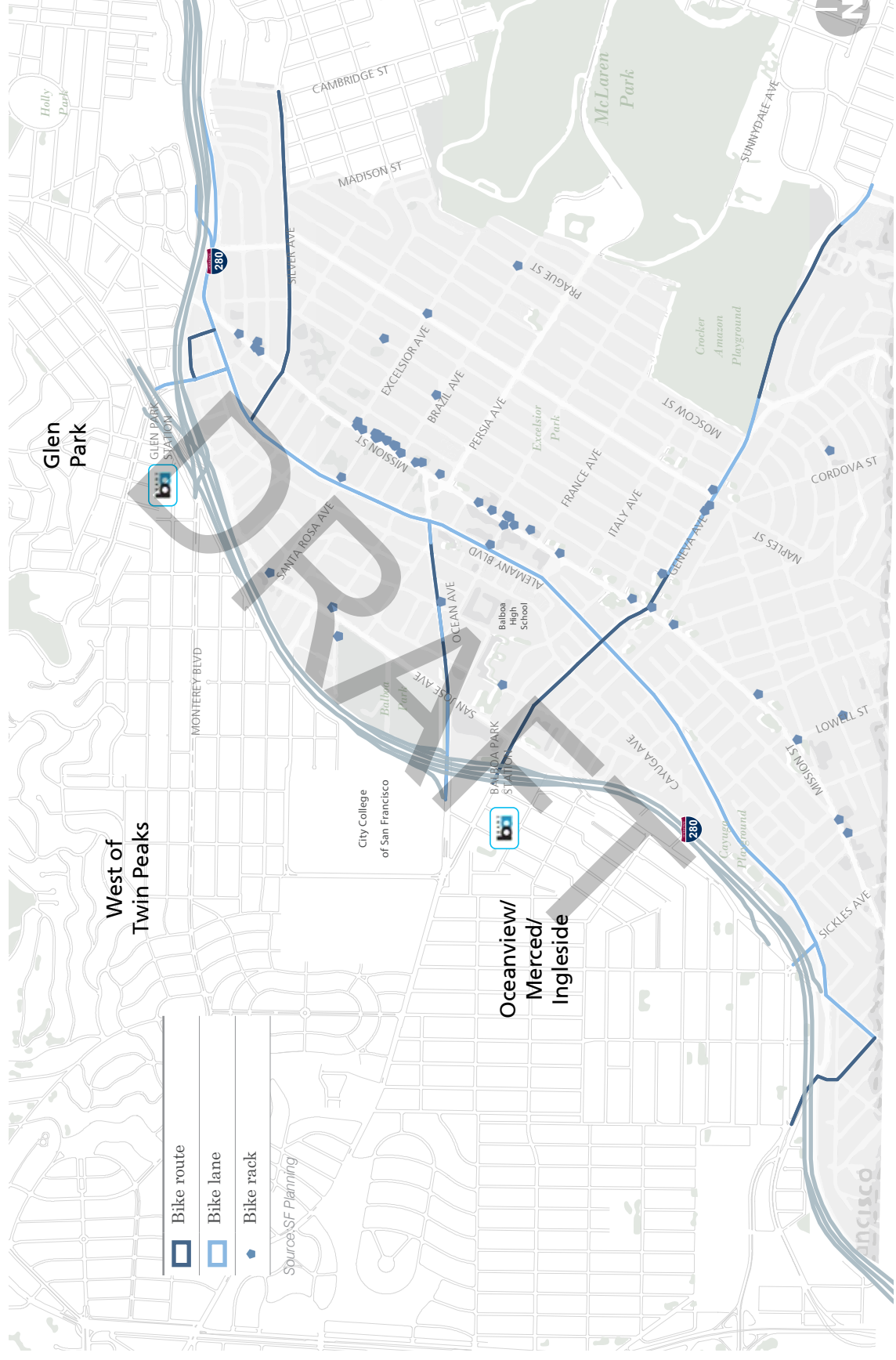
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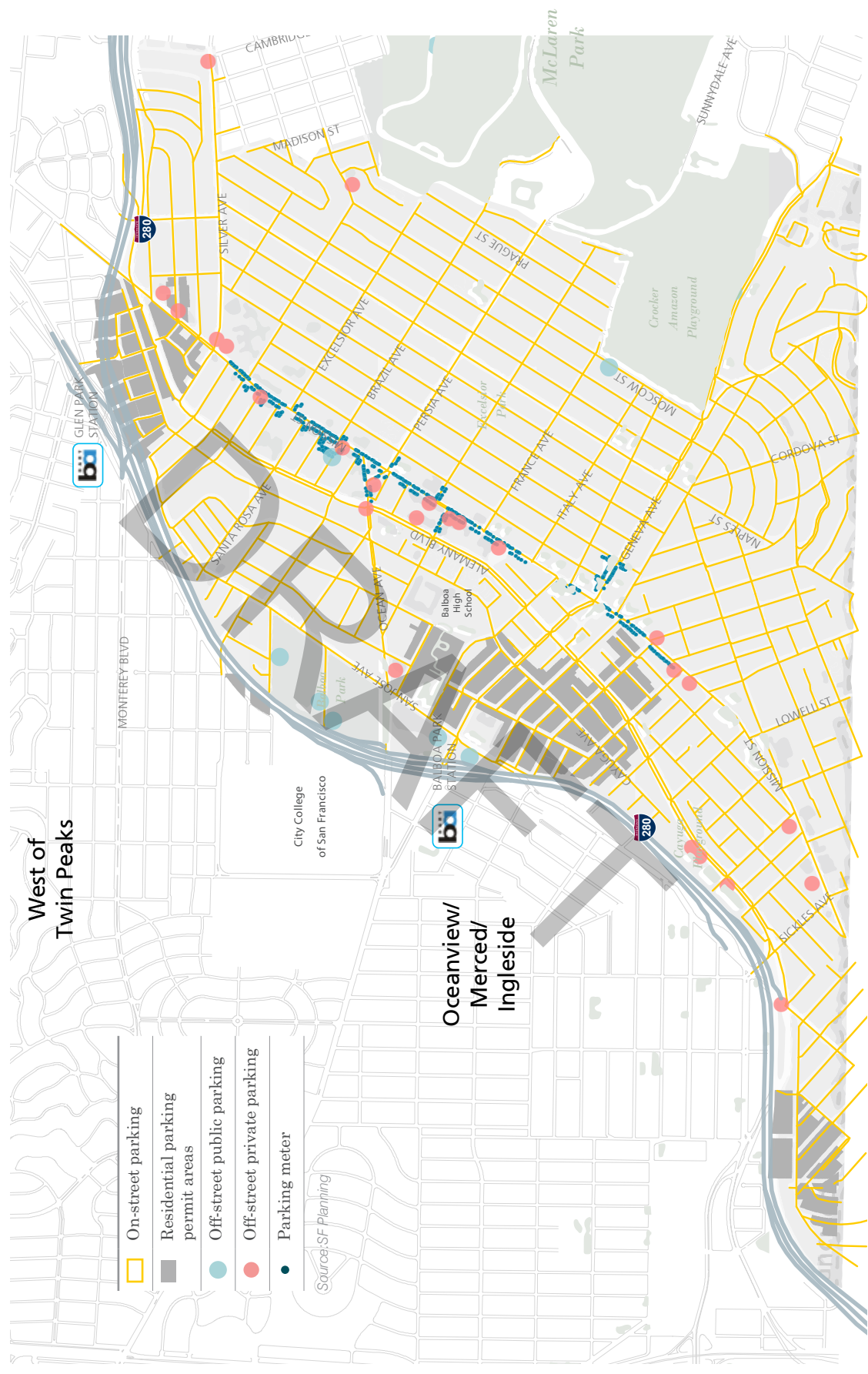
MUNI BUS ROUTES

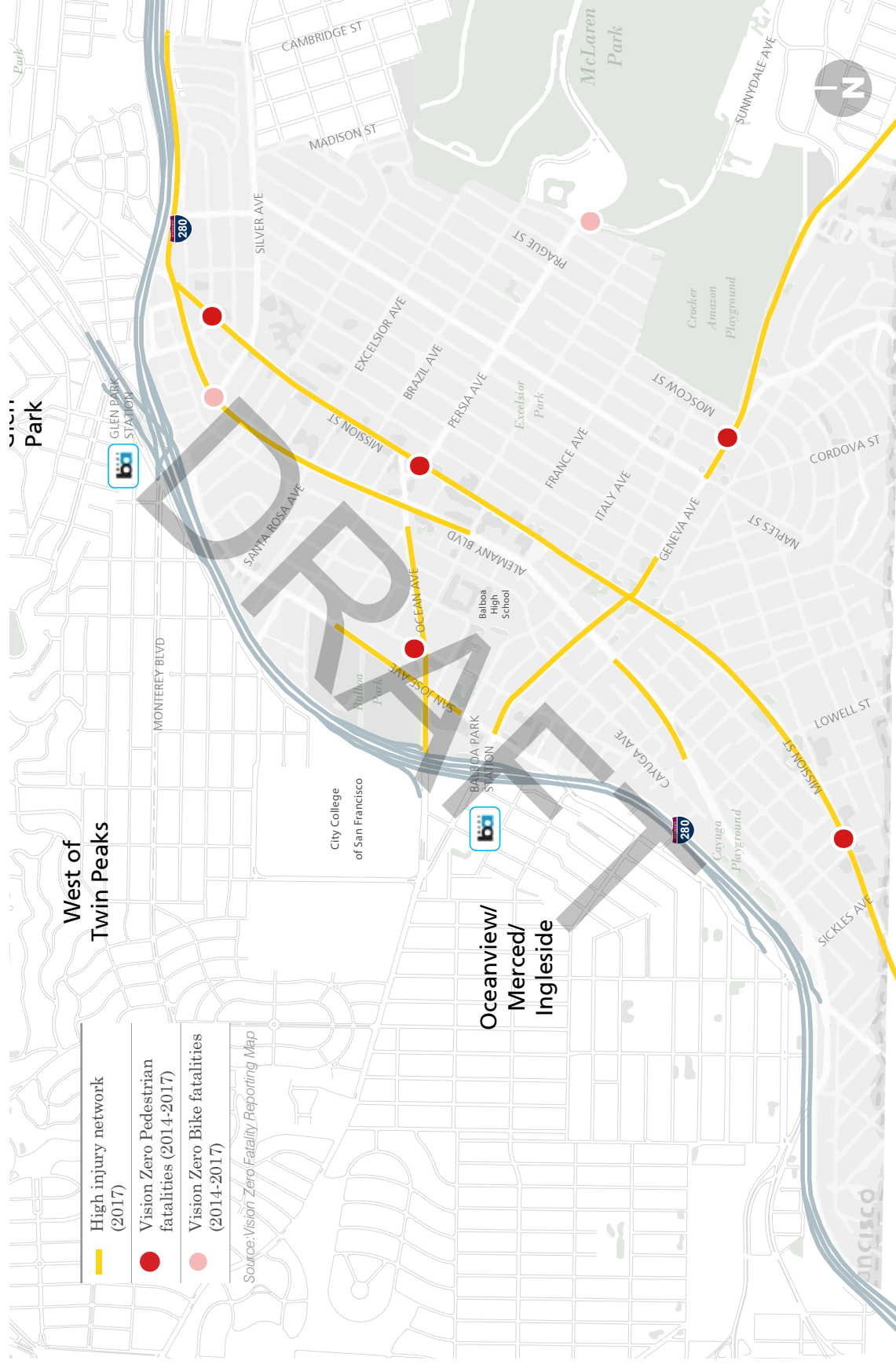


BIKE ROUTES AND PARKING



PARKING





PROJECT CORRIDOR BOARDINGS AND ALIGHTINGS



SURVEY

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CHAPTER 3

VIBRANT COMMERCE



Neighborhood Commercial District (NCD)

Figure 4-X

EXCELSIOR OUTER MISSION NCD

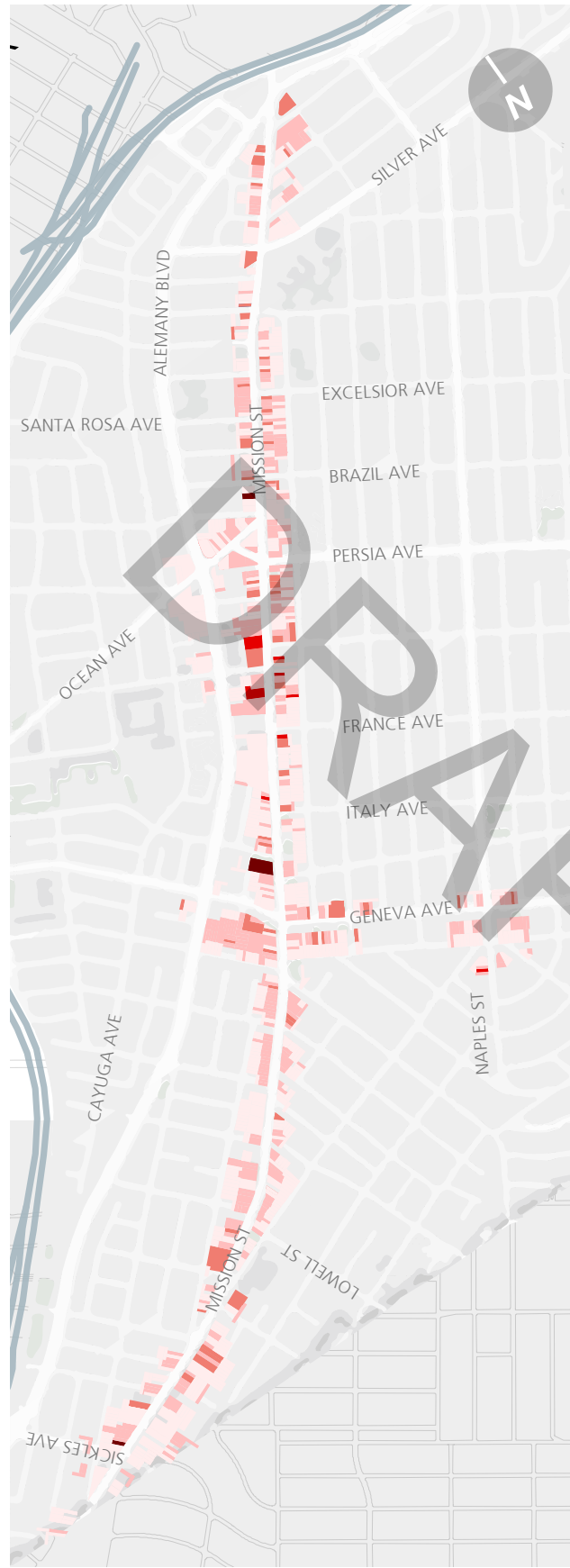


LENGTH

2.22 miles

Map 3-X

STORES IN THE NEIGHBORHOOD COMMERCIAL CORRIDOR



1 Story	923	57.1%
2 Story	563	34.8%
3 Story	114	7.1%
4 Story	13	0.8%
5 Story	1	0.1%
6 Story	3	0.2%

Source: SF Planning

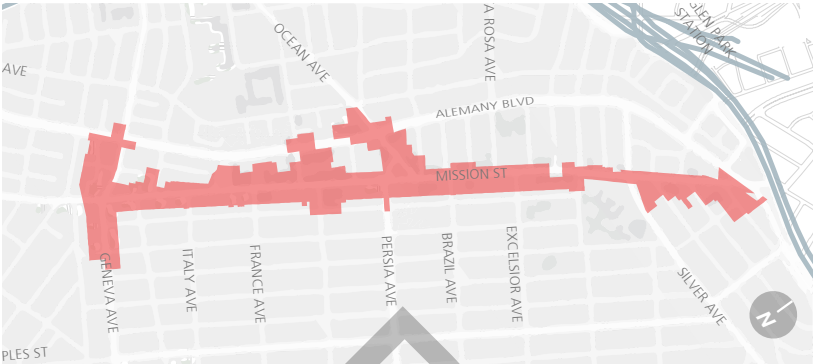
Map 3-X

SOFT SITES



Businesses

Figure 4-X
NCD SAMPLE



The data in this section provides a sampling of businesses in the NCD, and is not intended to be a complete overview of Excelsior’s businesses. Our sample is of businesses on Mission St, from Trumbull St. to Geneva Ave.

OF BUSINESSES

288

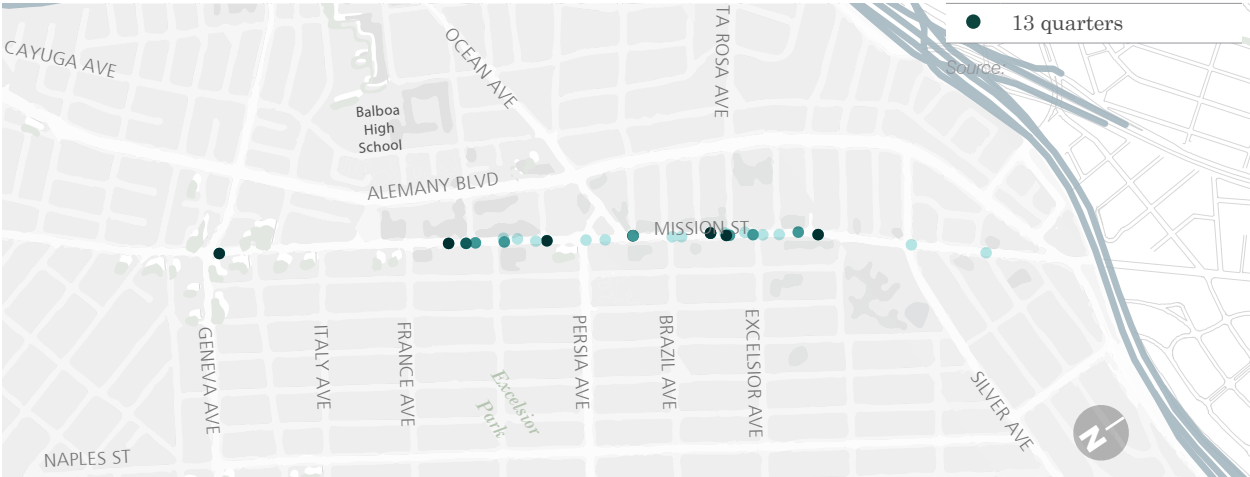
from Mission St. from Trumbull to Geneva

Vacancies

Figure 4-X
VACANCIES

QUARTERS VACANT

- 1 quarter
- 5 quarters
- 9 quarters
- 13 quarters



Businesses by type

Figure 4-X

BUSINESSES BY SUBTYPE, 2017

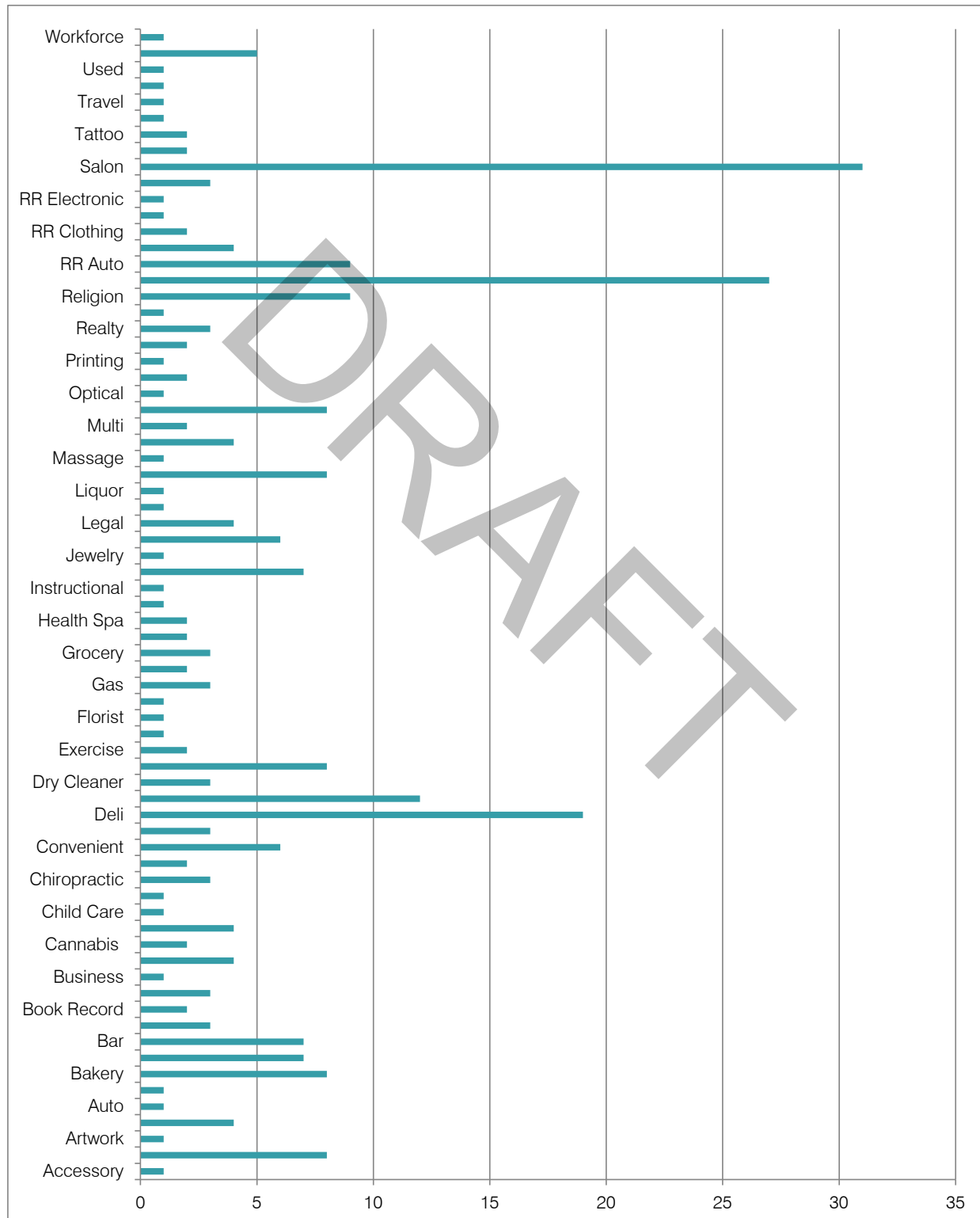


Figure 3-X

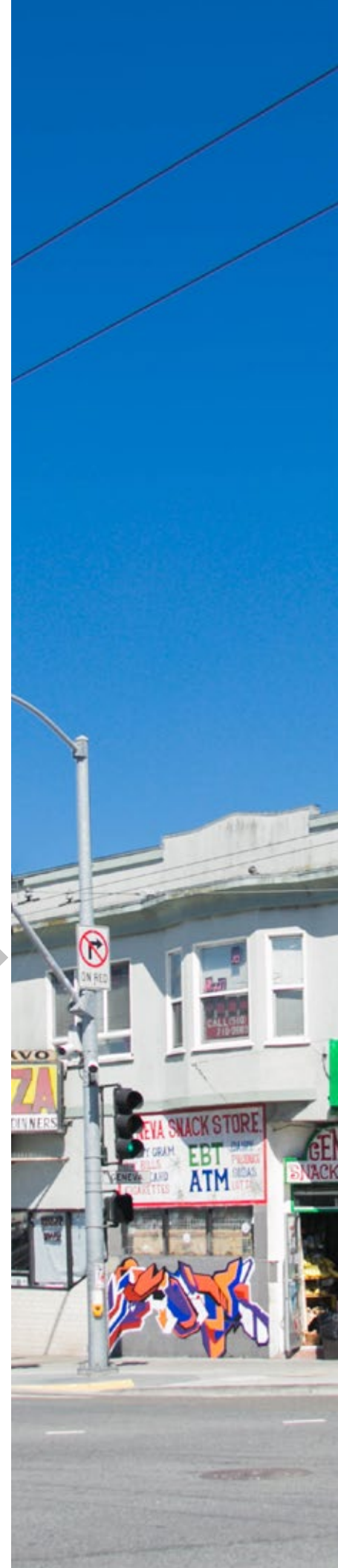
BUSINESSES BY TYPE - YEARLY

EATING AND DRINKING		2017 Q1	2016 Q4	2015 Q4	2014 Q4	2013 Q4
Social Eating	Bakery	8	8	7	7	7
	Café	4	4	5	5	6
	Deli	19	19	16	18	18
	Dessert	0	0	0	1	1
	Restaurant	27	27	25	24	25
Social Drinking	Bar	7	7	6	7	7
	Night Club	0	0	2	1	1
Other	Entertainment	0	0	0	0	1
	Sum	65	65	61	63	66

Source:

RETAIL		2017 Q1	2016 Q4	2015 Q4	2014 Q4	2013 Q4
Retail Wearing	Accessory	1	1	1	3	3
	Beauty	3	3	3	3	3
	Clothing	2	2	5	8	8
	Jewelry	1	1	1	2	2
	Retail Eating	6	6	6	5	5
	Grocery	3	3	3	2	2
	Liquor	1	1	1	1	1
	Market	8	8	9	9	9
	Pharmacy	2	2	2	2	2
	Smoke	2	2	2	2	2
Retail Other	Auto	1	1	1	2	2
	Auto Supply	1	1	1	0	0
	Book Record	2	2	1	0	0
	Décor	3	3	3	3	4
	Electronic	8	7	5	2	2
	Equipment	0	0	0	1	1
	Florist	1	1	1	2	2
	Gift	2	2	1	2	2
	Hardware	2	1	1	1	1
	Used	1	1	1	0	0
	Variety	5	5	5	6	5
	Sum	55	53	53	56	56

Source:





PUBLIC USE

		2017 Q1	2016 Q4	2015 Q4	2014 Q4	2013 Q4
Community	Assn Soc	4	4	4	3	3
	Non-Profit	8	8	6	5	5
	Recovery	1	1	1	0	0
	Religion	9	9	7	8	8
	Thrive Store	1	1	1	0	0
Government	Library	1	1	1	1	1
	Sum	24	24	20	17	17

Source:

SALES & SERVICES

		2017 Q1	2016 Q4	2015 Q4	2014 Q4	2013 Q4
Sales & Services	Alteration	0	0	0	2	2
	Artwork	1	1	1	0	0
	Chinese Med	1	1	1	0	0
	Dry Cleaner	3	3	3	3	3
	Gallery	0	0	0	2	2
	Laundromat	6	6	5	5	5
	Locksmith	0	0	0	1	1
	Multi	2	2	2	2	2
	Optical	1	1	1	1	1
	Printing	1	1	1	2	2
	RR Auto	9	9	9	8	8
	RR Building	4	4	3	0	0
	RR Clothing	2	2	2	0	0
	RR Computer	0	0	0	1	0
	RR Décor	1	1	1	0	0
	RR Electronic	1	1	0	0	0
	RR Equipment	0	0	0	1	1
	RR Jewelry	3	2	3	0	0
	RR Watch	0	0	0	1	1
	Upholstery	0	0	0	1	1
S&S Other	Funeral	1	1	1	1	1
	Gas	3	3	3	3	3
	Hotel	1	1	1	0	0
	Motel	0	0	0	1	1
	Sum	40	39	37	35	34

Source:

SERVICES

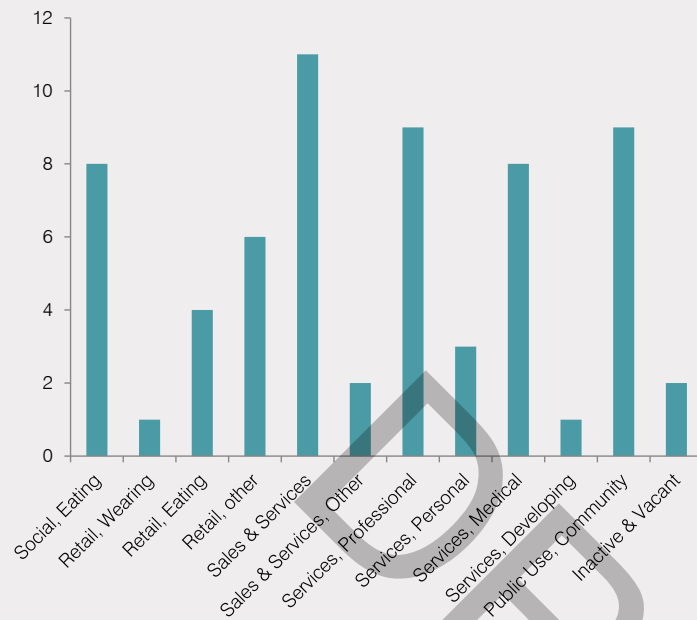
		2017 Q1	2016 Q4	2015 Q4	2014 Q4	2013 Q4
Professional	Accounting	8	11	11	0	0
	Banking	7	7	6	5	5
	Building	3	3	2	0	0
	Business	1	1	1	0	0
	Financial	1	1	2	0	0
	Insurance	7	7	7	7	6
	Legal	4	4	4	2	2
	Realty	3	3	3	5	5
	Tax	0	0	0	8	8
	Travel	1	1	0	1	1
	Casher	4	4	4	6	6
Personal	Health Spa	2	2	3	1	1
	Massage	1	1	0	2	2
	Salon	31	31	28	27	26
	Tattoo	2	2	2	2	2
Medical	Chiropractic	3	3	3	3	2
	Clinic	0	0	0	3	4
	Dental	12	12	12	12	12
	Med Center	4	4	3	0	0
	Treatment	1	1	1	1	1
Developing	Child Care	1	1	1	1	1
	Construction	0	0	0	7	7
	Driving	0	0	0	1	1
	Exercise	2	2	2	1	0
	Fitness	0	0	0	1	1
	Instructional	1	1	3	0	0
	Martial Arts	0	0	0	1	1
	Tutorial	0	0	0	1	1
	Senior Care	0	0	0	2	2
	Workforce	1	1	1	0	0
Other	Cannabis	2	2	2	1	1
	Cellphone	0	0	0	6	6
	Psychic	2	2	1	2	2
	Sum	104	107	102	109	106

Source:

Owner-Occupied Clusters

Figure 4-X

OWNERSHIP BY BUSINESS TYPE



OWNER OPERATED

66 in 2017

LEASEE

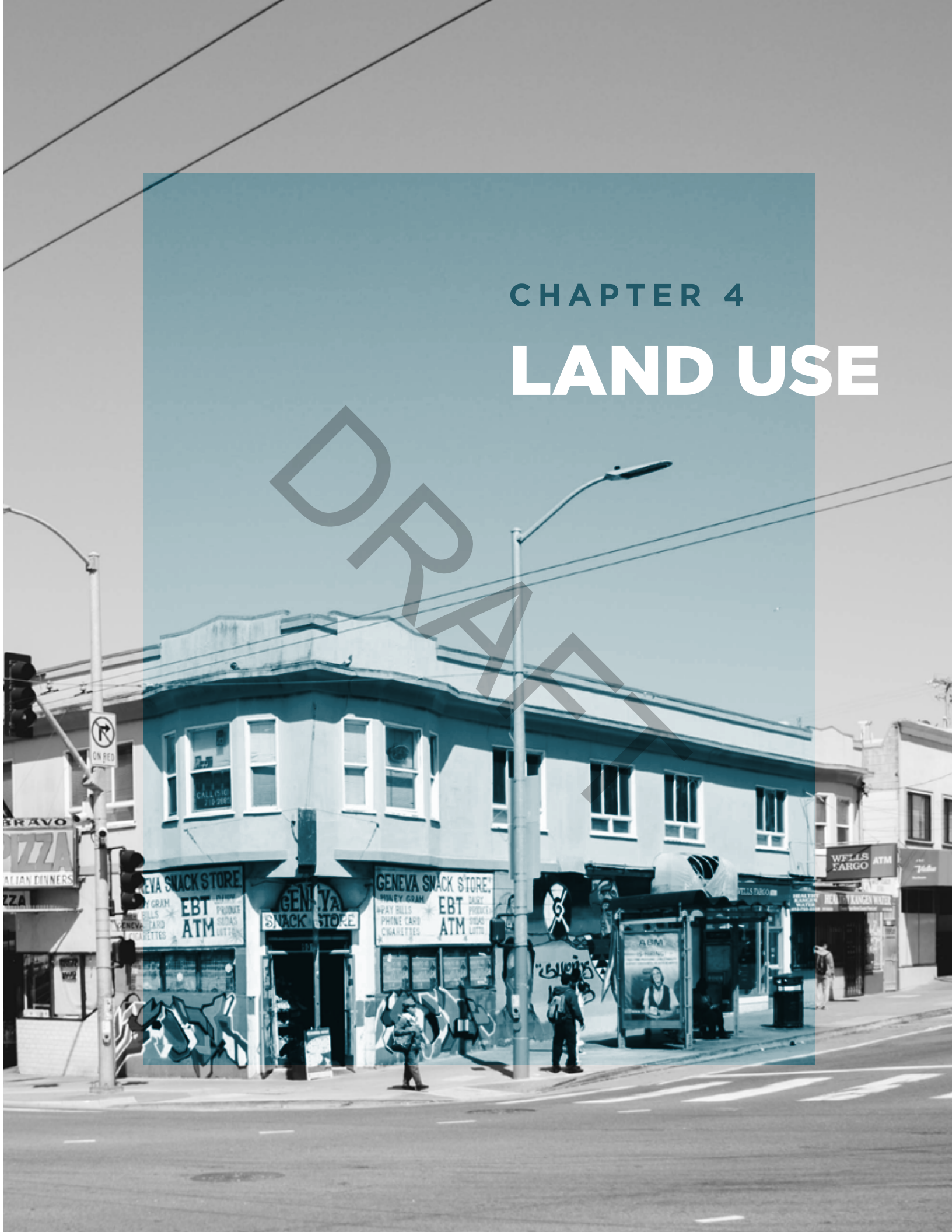
255 in 2017

Figure 4-X

OWNER-OCCUPIED CLUSTERS

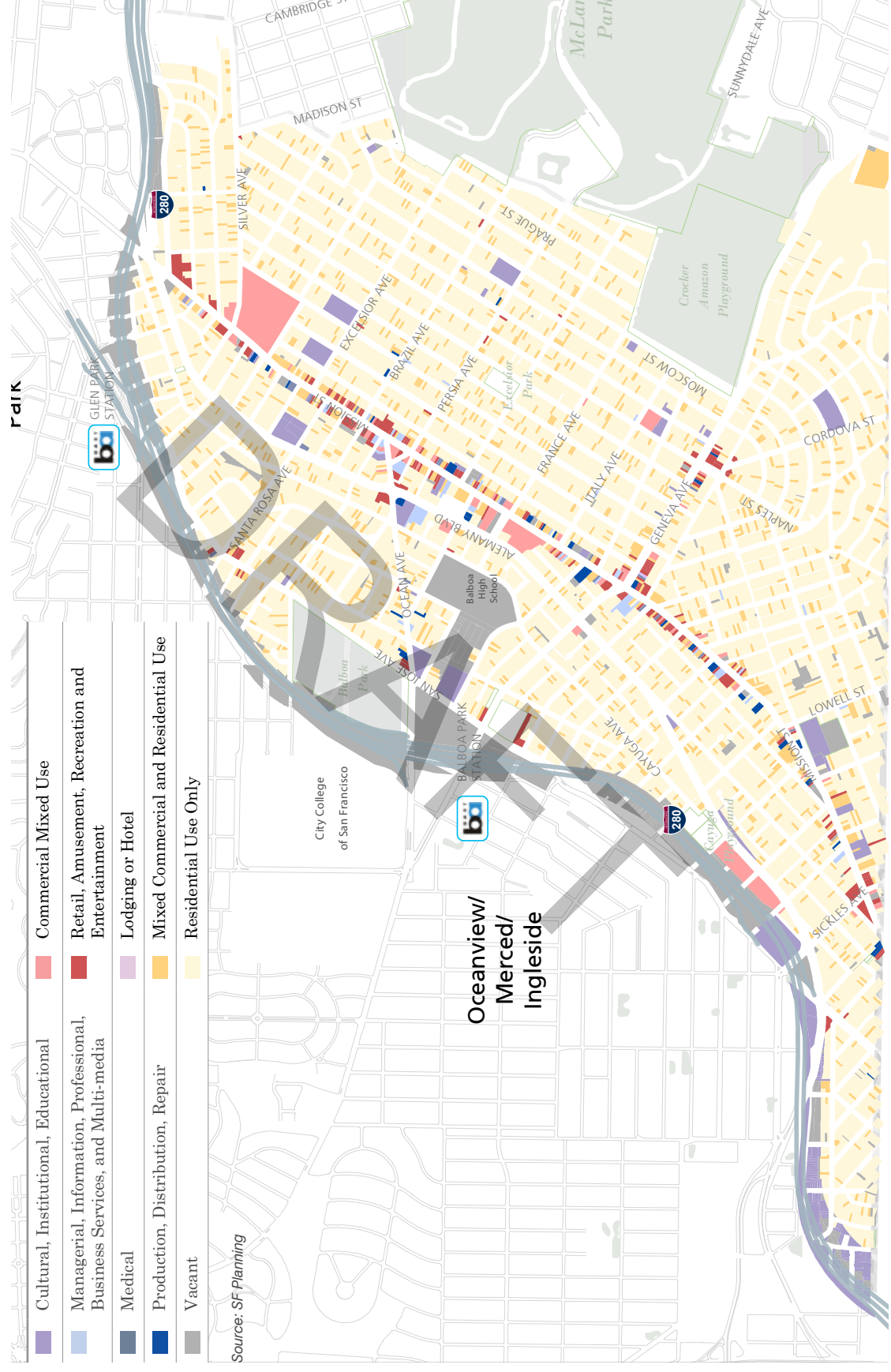
CHAPTER 4

LAND USE

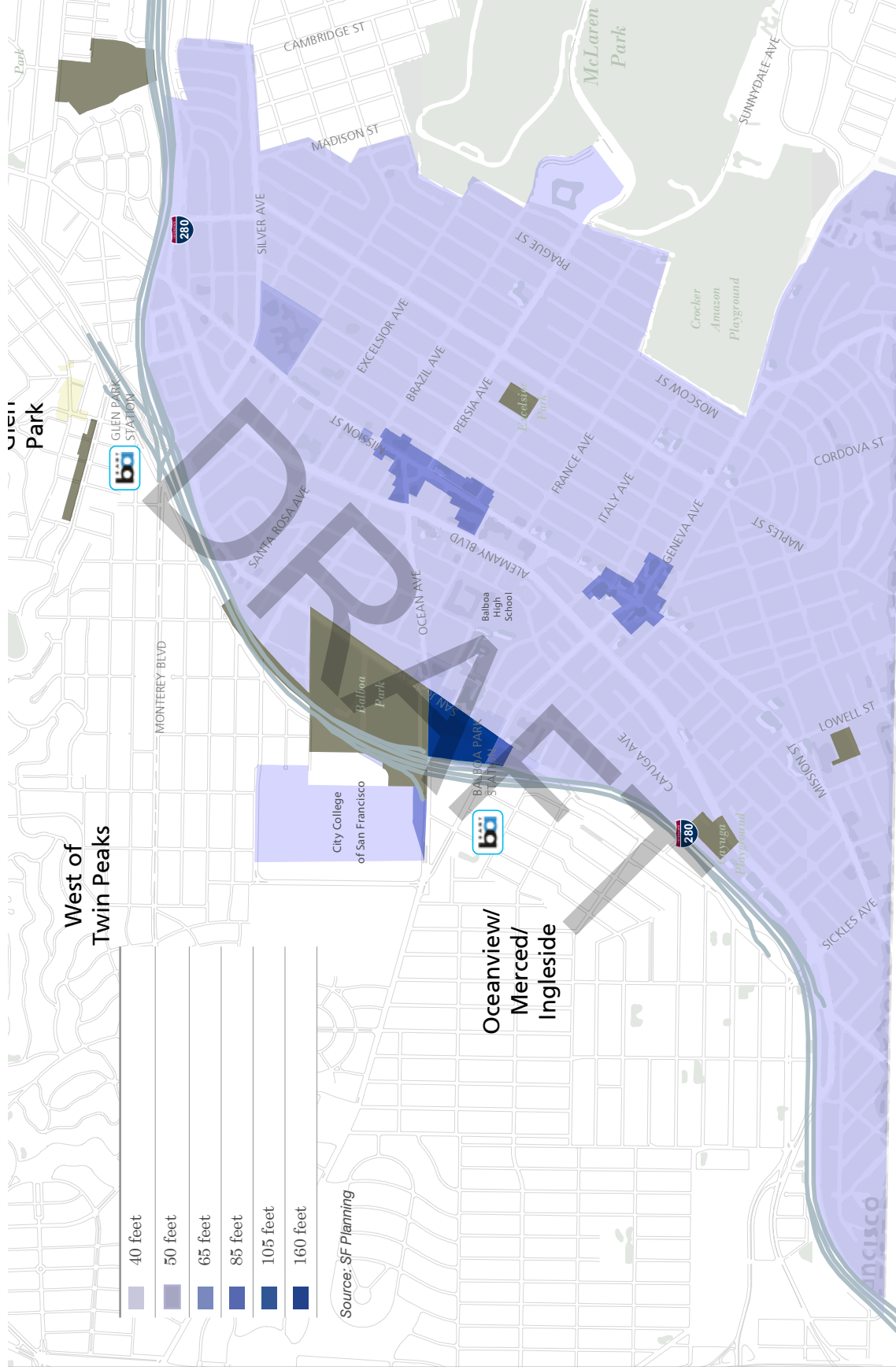


Map 4-X

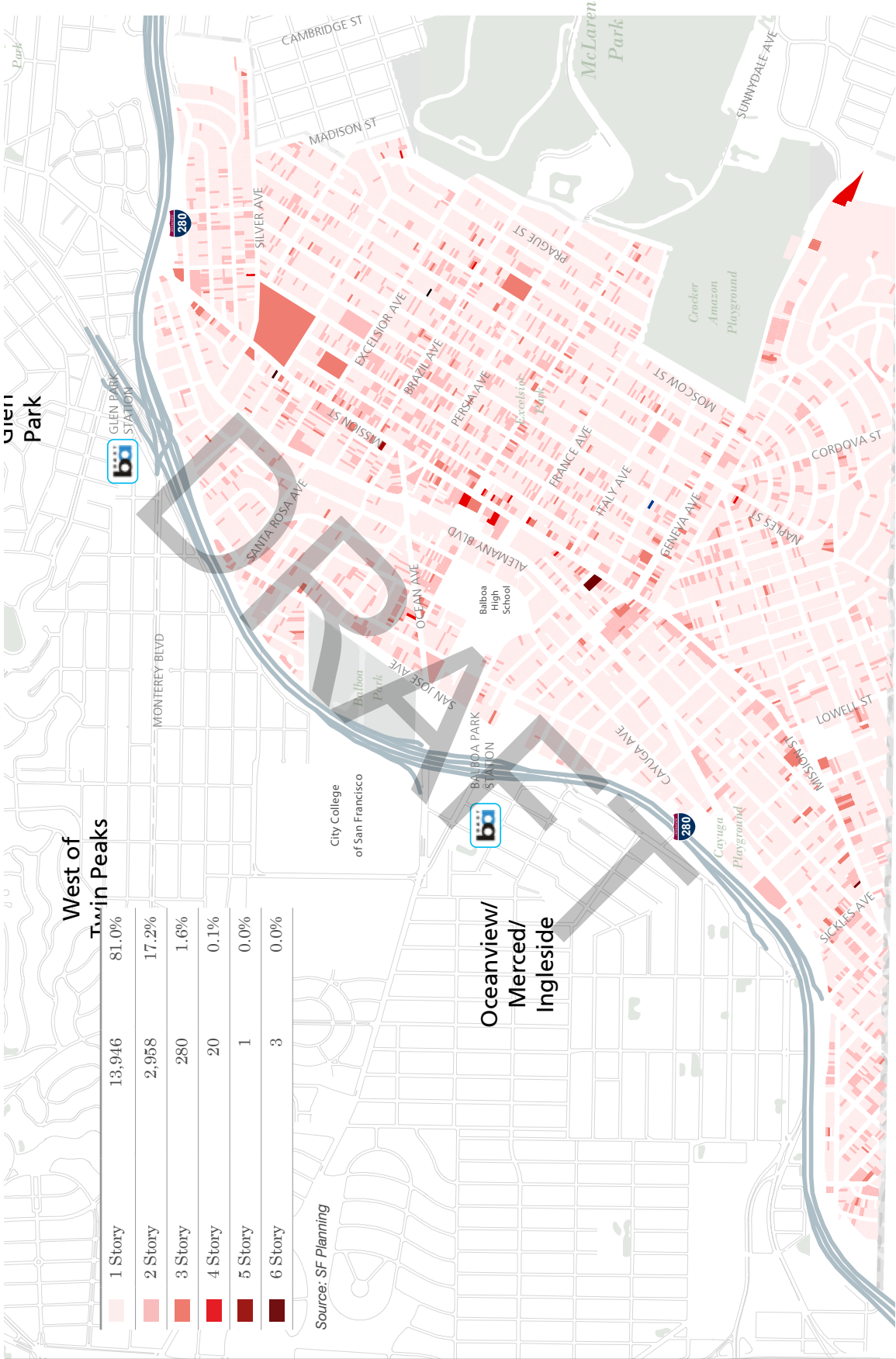
LAND USE



HEIGHT DISTRICTS



STORIES



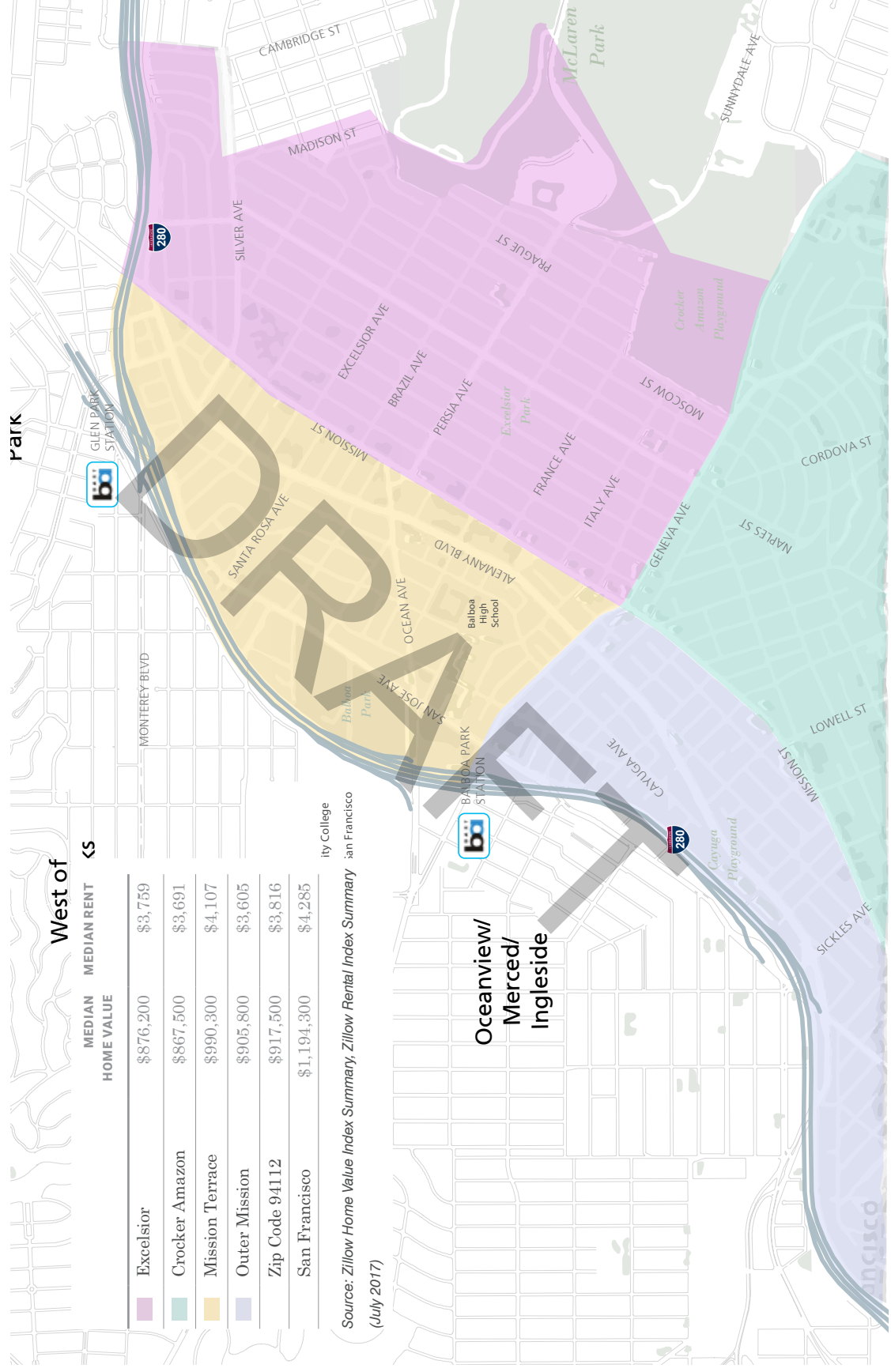


Figure 4-X

Unit Mix

HOUSING UNITS

18,270
vs. 383,680 citywide

POPULATION DENSITY

41.5
vs. 27.9 people/acre citywide

RESIDENTIAL DENSITY

11.9
vs. 12.7 units/acre citywide

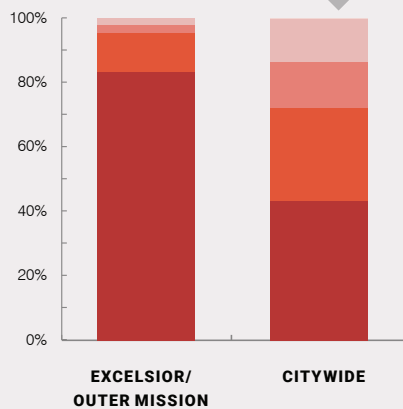
MEDIAN YEAR STRUCTURE BUILT

1947
vs. 1958 citywide

MEDIAN YEAR OF MOVE IN

	EOM	CITYWIDE
Owner	1980	1985
Renter	1992	1994

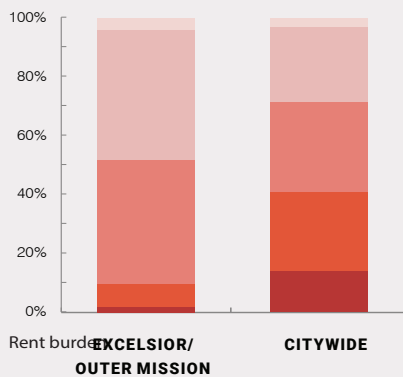
Source: US Census American Community Survey 2011-2015



TOTAL UNITS

	EXCELSIOR/ OUTER MISSION	CITYWIDE
Single family housing	82.3%	31.9%
2-4 units	11.8%	21.4%
5-9 units	2.8%	10.4%
10-19 units	2.0%	10.0%
20 units or more	1.0%	26.1%
Other structure type	0.1%	0.2%

Source: US Census American Community Survey 2011-2015



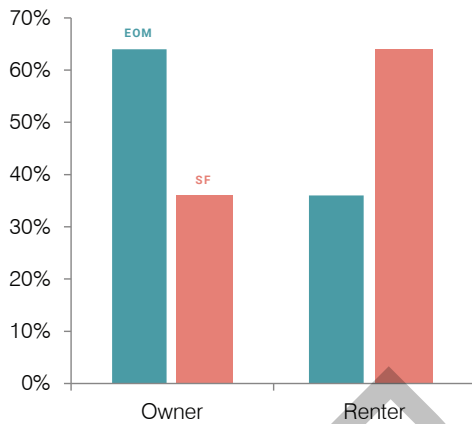
NUMBER OF BEDROOMS

	EXCELSIOR/ OUTER MISSION	CITYWIDE
No bedroom	2%	14%
1 bedroom	8%	27%
2 bedroom	42%	31%
3-4 bedrooms	44%	26%
5 or more bedrooms	4%	3%

Source: US Census American Community Survey 2011-2015

Owners

Figure 4-X



TENURE BY HOUSEHOLD

	OWNER	RENTER
Excelsior & Outer Mission	64%	36%
San Francisco	36%	64%

Source: US Census American Community Survey 2011-2015

Figure 4-X



OWNER HOUSING COST BURDEN

Less than 30% of income spent on housing costs*	6,882	61.4%
30-50% of income spent on housing costs	2,206	19.7%
50% of income spent on housing costs	2,065	18.4%
Not computed	59	0.5%

Source: US Census American Community Survey 2011-2015

*Owner housing costs include mortgage, property tax, insurance, utilities and sometimes homeowners association dues

OWNER HOUSEHOLDS WITH NO MORTGAGE

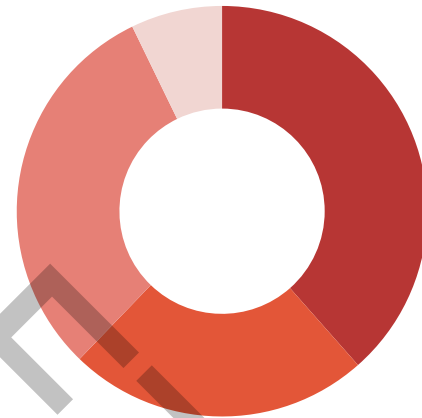
30%

OWNER HOUSEHOLDS WITH NO MORTGAGE WHO SPEND LESS THAN 30% OF INCOME ON HOUSING

86%

Renters

Figure 4-X



RENT BURDEN

Less than 30% of income spent on gross rent	2,462	38.5%
30-50% of income spent on gross rent	1,518	23.7%
50% of income spent on gross rent	1,957	30.6%
Not computed	461	7.2%

Source: US Census American Community Survey 2011-2015

*Gross rent includes rent and utilities

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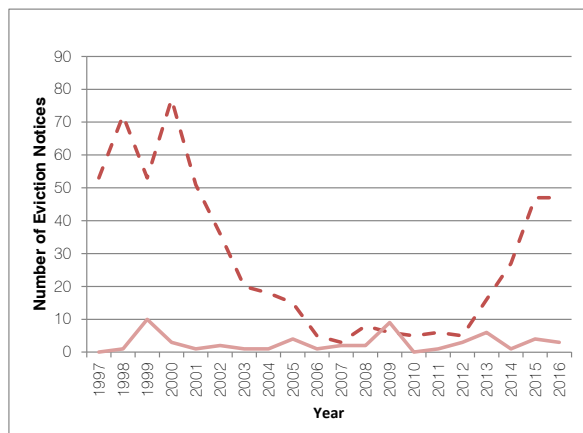
VACANCY

4%

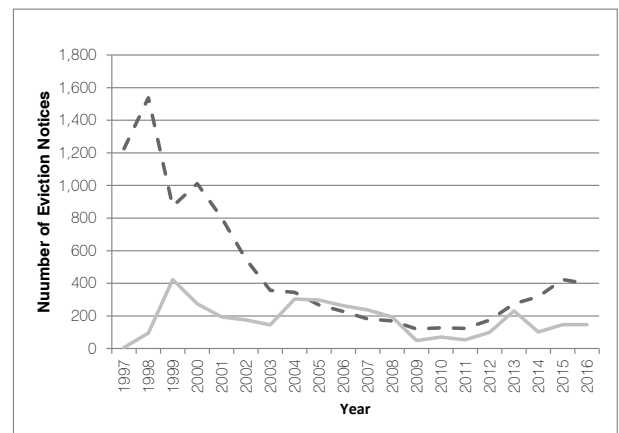
vs. 8% citywide

Evictions

EXCELSIOR NO-FAULT EVICTIONS BY TYPE

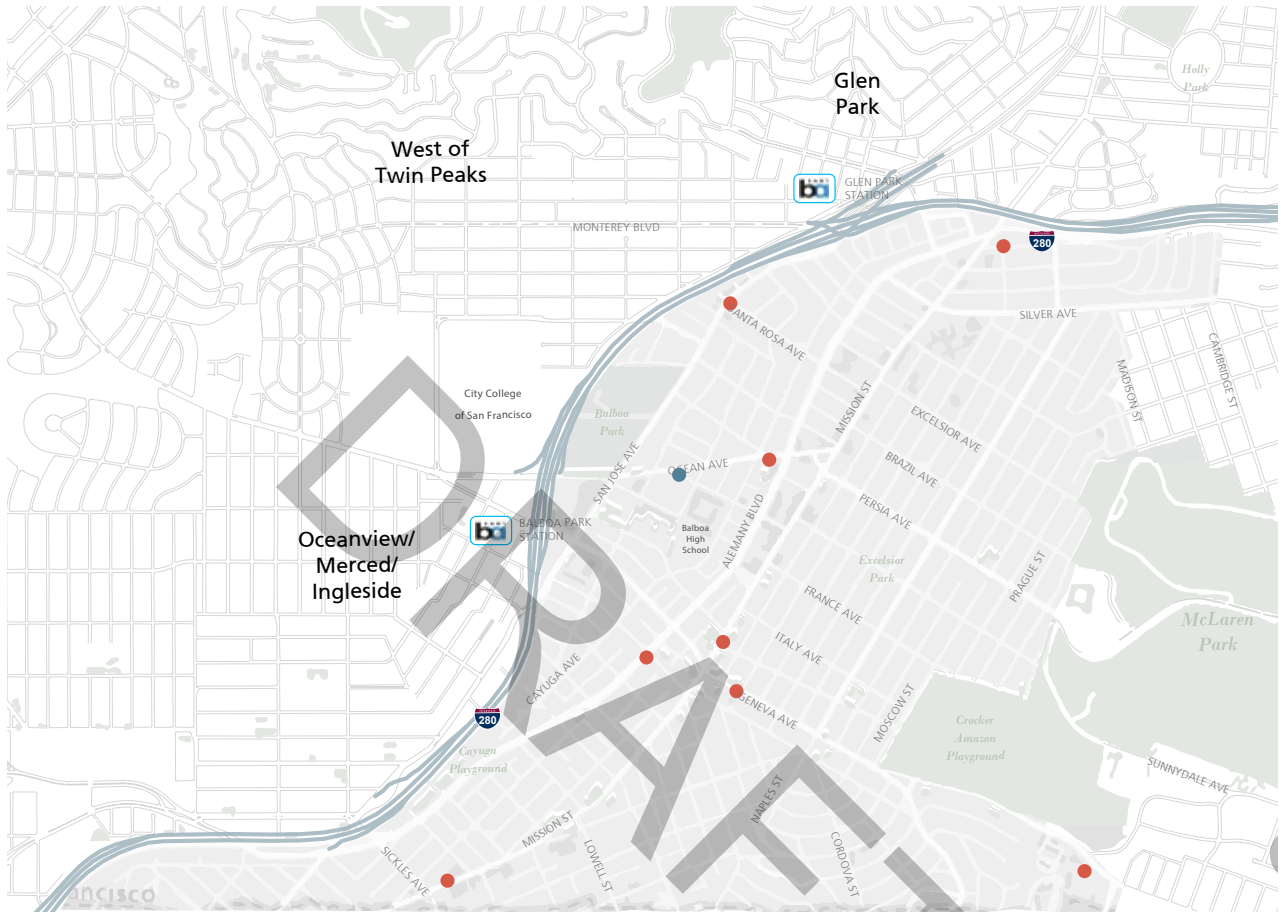


SAN FRANCISCO NO-FAULT EVICTIONS BY TYPE



Map 4-X

INCLUSIONARY HOUSING



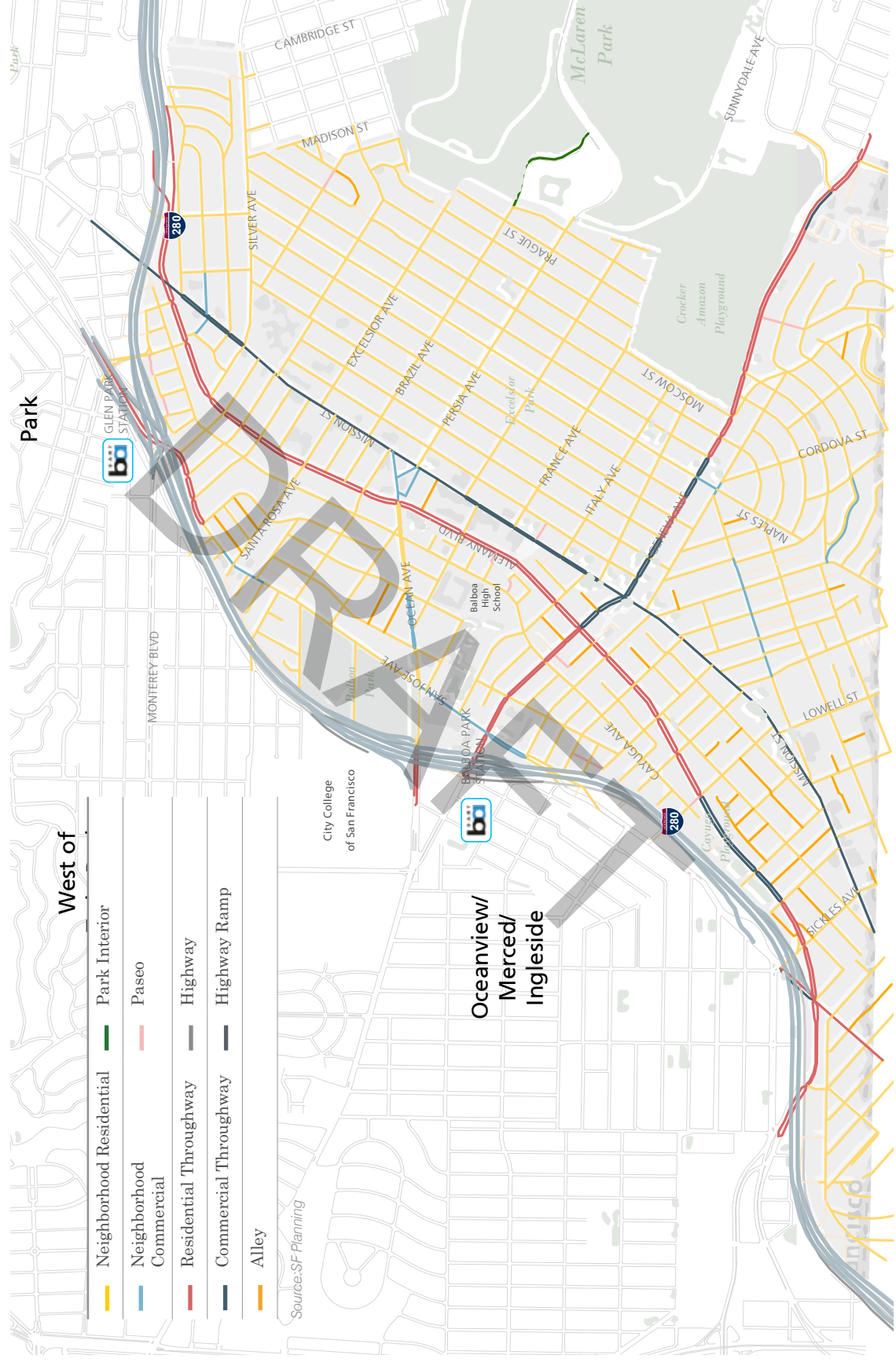
INCLUSIONARY HOUSING	ADDRESS	STATUS	TOTAL UNITS	UNITS BMR
The Bouganvillea	5810 Mission St	Completed	27	3
888 Paris	965 Geneva Ave	Completed	67	8
Ocean View Village	2251 Alemany Blvd	Completed	37	2
5050 Mission St	5050 Mission St	Building Permit Issued	61	9
70 Ocean	98 Ocean Ave	Completed	20	2
248 Ocean Avenue	248 Ocean Ave	Completed	5	0
Mission Terrace Condominiums	1800 San Jose Ave	Completed	18	2
55 Trumbull	55 Trumbull St	Completed	18	2
1828 Geneva	1828 Geneva Ave	Completed	48	6

Source: Mayor's Office of Housing and Community Development

A photograph of a city street scene. In the foreground, a palm tree stands on a sidewalk. The street is paved and has a blue-tinted overlay on the right side. In the background, there are buildings, including one with a 'POPEYE'S' sign, and a few people walking. The text 'CHAPTER 5' is overlaid on the blue-tinted area.

CHAPTER 5

**PUBLIC
REALM**



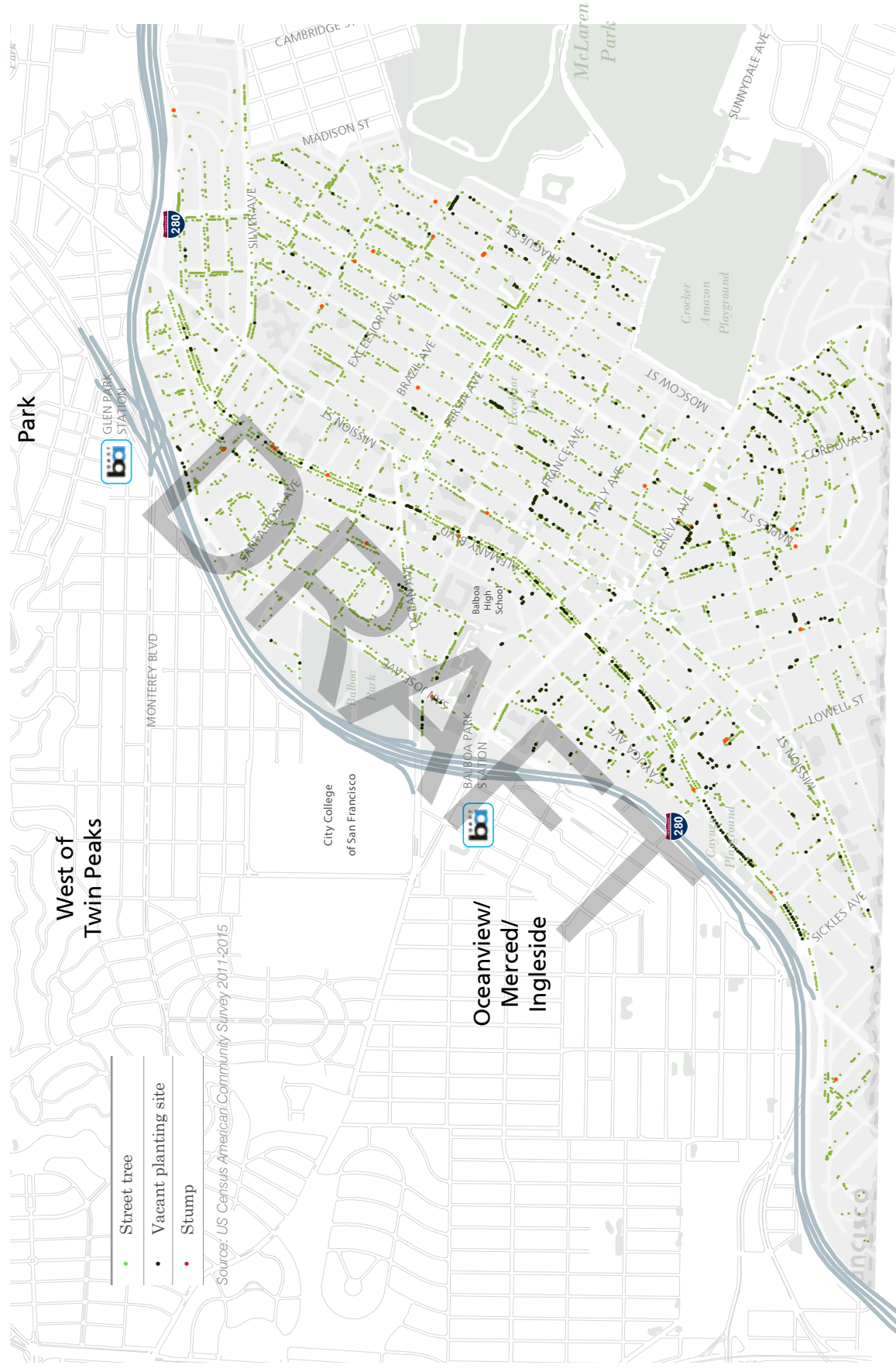


Figure 5-X

STREET WIDTH: GENEVA AVE.

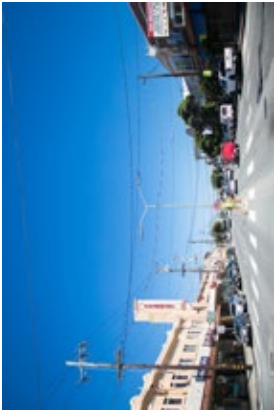
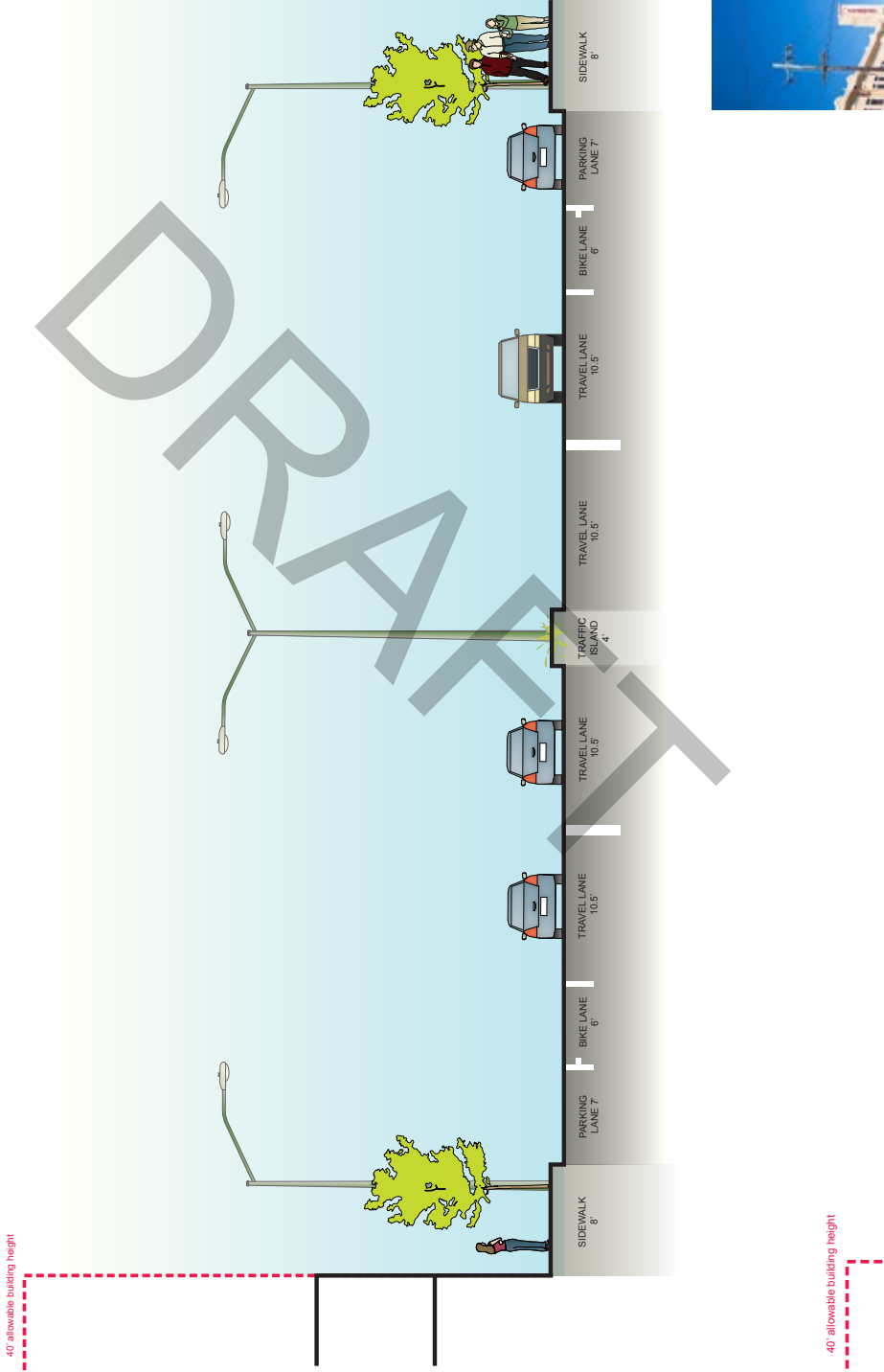
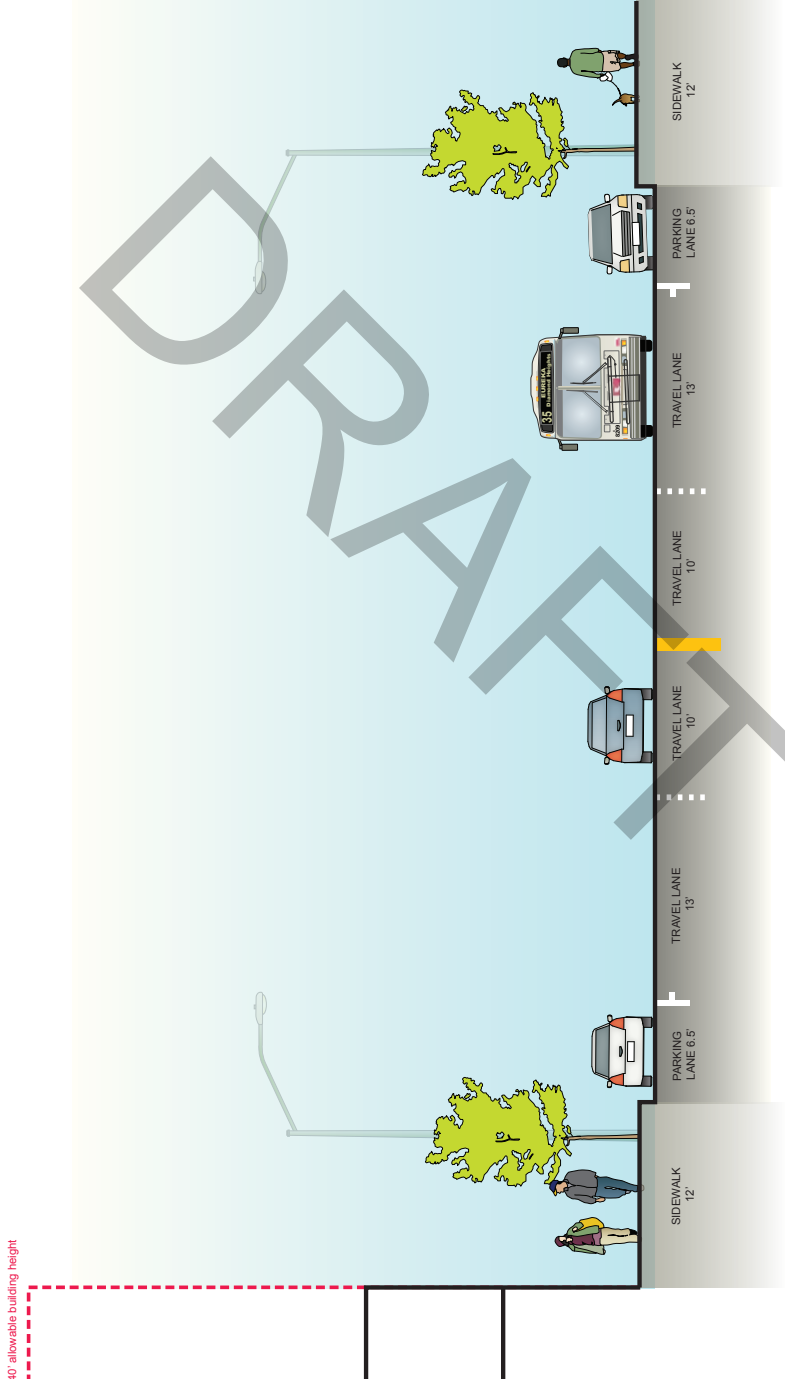


Figure 5-X

STREET WIDTH: MISSION ST.



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