



**DOWNTOWN PLAN**  
*ANNUAL MONITORING REPORT*

2012



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<b>2012 SUMMARY &amp; INFOGRAPHIC</b>	<b>ii</b>
<b>INTRODUCTION</b>	<b>01</b>
The Downtown Plan	01
Report Structure	01
Data Sources	02
<b>PART 1: COMMERCIAL SPACE, EMPLOYMENT, AND REVENUE TRENDS</b>	<b>03</b>
Commercial Space	03
Employment	06
Revenue	07
<b>PART 2: DOWNTOWN SUPPORT INFRASTRUCTURE</b>	<b>09</b>
Housing	09
Transportation	11
Privately-Owned Public Open Space (POPOS) & Public Art	14
<b>CONCLUSION</b>	<b>15</b>
<b>TABLES</b>	
Table 1: Commercial Project Pipeline	03
Table 2: Existing Office Space	04
Table 3: Office Vacancy	05
Table 4: Retail Vacancy	05
Table 5: Hotel Occupancy and Rate	05
Table 6: Employment -- Citywide	06
Table 7: Employment -- Downtown C-3 Zone	06
Table 8: Business Taxes	08
Table 9: Property Taxes	08
Table 10: Sales and Use Taxes	08
Table 11: Hotel Room Tax	08
Table 12: Net Housing Change: Citywide	09
Table 13: Net Housing Change: Downtown	09
Table 14: Residential Project Pipeline	10
Table 15: Jobs-Housing Linkage Fees Collected	10
Table 16: Net Parking Change -- Downtown C-3 Zone	11
Table 17: Peak Period MUNI Transit Ridership to and from Downtown	11
Table 18: Average Vehicle Occupancy	13
Table 19: Transit Impact Development Fee (TIDF) Collections	13
Table 20: Privately-Owned Public Open Space (POPOS) & Public Art	14
<b>MAPS</b>	
Map 1. Downtown C-3 Zone	02
Map 2. Superdistrict 1	13

# 2012 Summary & Infographic

Downtown San Francisco continued to be a resilient district for San Francisco and the region in 2012, largely because of Downtown Plan policies. Adopted in 1985, these policies strengthened Downtown San Francisco's physical qualities as a vibrant place and enhanced its functioning as a regional center.

The annual changes in Downtown land use are summarized below (downtown's share of citywide total is listed in parentheses when applicable). The economy is recovering as evidenced by rebounding development, declining vacancy rates, increasing rents, stabilizing employment, and growing tax revenue and use fees. Transit use is high and mode share is stable. The addition of long term parking spaces, POPOS, and public art, however, has temporarily slowed or stopped as the lingering effects of the last economic downturn.

## LAND USE CHARACTERISTICS *(share of citywide total when applicable)*

### Existing Development

**Office:** 72.2 million square feet (msf; 64%).

**Retail:** 8.7 msf (16%).

**Hotel:** 20,000 rooms (60%).

### Vacancy Rates declined

**Office:** 8.7% Downtown.  
8.9% Citywide.

**Retail:** 6.0% Downtown.  
4.3% Citywide.

### Office Rents\* increased

**23%** to \$52.21/sf **Downtown**.

\*All building classes, gross rental rate, full service.

### Hotel Rates increased (avg).

**Occupancy** to 80%.

**Room charge** to \$175/night.

### Commercial "Pipeline"

**Total:** 1.4 msf (10%).

**Office:** 725,000 sf (7%).

**Retail:** 507,000 sf (16%).

**Hotel** 7.6%.

### Residential rebounded

**Downtown:** 200 net new units.

**Citywide:** 1,290 units.

### Residential "Pipeline"

to add 3,900 units or 9%.

### Employment

**Downtown:** stabilized at 225,000 jobs.

**Citywide:** increased 4% to 572,200 jobs.

### Tax Revenue increased

**Business** 19%.

**Sales** 15%.

**Hotel** 7.6%.

**Property** 10%.

### Jobs-Housing Linkage Fee

Increased 300% to \$7.8M.

### Transit Ridership

**680,000 boardings citywide** (weekday average).

**42% during PM peak period** (4-6PM).

**34% with Downtown** as origin or destination.

### Mode Share *(Superdistrict 1)*

**Little change** from 2000 Census:

33% transit

31% walk

24% car

2% bike

8% work at home

2% other.\*

\* US Census, ACS 2007-2011 average. Employed Residents.

### Vehicle Occupancy declined

**1.18** in 2000

**1.15** in 2011

*(in-commuters to all SF jobs).*

### Long-Term Parking Spaces

**No new** net spaces approved.

### TIDF Revenue

**Increased** 350% to \$7.8M.

### POPOS (existing total)

**81** (none added since 2008).

### Public Art (existing total)

**31** (none added since 2008).

# PART 1: Commercial

## EXISTING COMMERCIAL SPACE

*Downtown share of Citywide*

Office *Square feet*



Retail *Square feet*



Hotel *Rooms*



*215 hotels Citywide*

SEE TABLE 2

## COMMERCIAL PROJECT PIPELINE

*Downtown share of Citywide*

Office *Net Square feet*



Retail *Net Square feet*



Hotel *Net Square feet*

<i>Added</i>	<i>Demolished</i>	<b>138,000</b>
139,600	-1,600	
<hr/>		
670,250	-664,600	<b>5,650</b>

TOTAL *Net Square feet*



■ Downtown ■ Citywide

# PART 1: Commercial (cont'd)

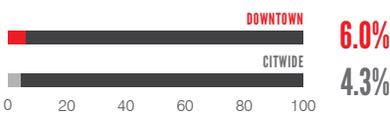
## VACANCY

### Office Vacancy ↓



SEE TABLE 3

### Retail Vacancy ↓



SEE TABLE 4

### Office Rent

**\$52.21** / SQUARE FOOT ↑ 23%

### Hotel



SEE TABLE 5

## EMPLOYMENT (JOBS)

*Downtown share of Citywide*

### Office Jobs



SEE TABLES 6 & 7

### Retail Jobs



### Hotel Jobs



### TOTAL JOBS



## REVENUE

### Business Taxes

**\$488,100,000** ↑ 19%

SEE TABLE 8

### Sales & Use Taxes

**\$121,900,000** ↑ 15%

SEE TABLE 10

### Property Taxes

**\$1,340,000,000** ↑ 9.6%

SEE TABLE 9

### Hotel Room Tax

**\$190,900,000** ↑ 7.6%

SEE TABLE 11



# PART 2: Infrastructure

## RESIDENTIAL UNITS

*Net units*

**200** **↑ 735%**  
 1,290 **↑ 378%**

SEE TABLES 12 & 13

## RESIDENTIAL PIPELINE PROJECTS

*Downtown % of Citywide*      *Units*



SEE TABLE 14

## DOWNTOWN PARKING SPACES

*Net New Spaces*



SEE TABLE 16

## TRANSIT RIDERSHIP

*Total Transit Boardings*

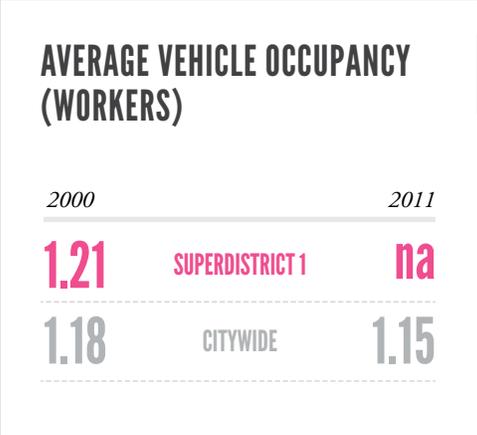
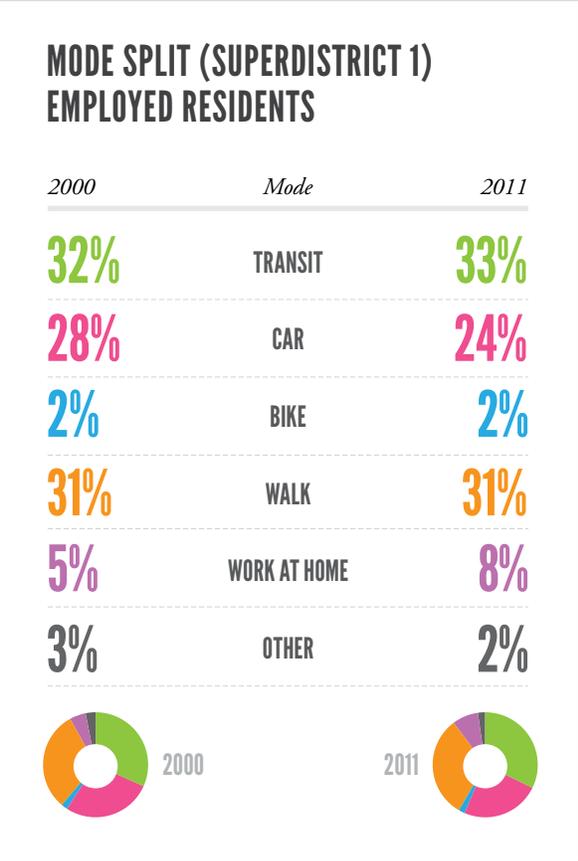
**680,000**  
 WEEKDAY BOARDINGS CITYWIDE

SEE TABLE 17

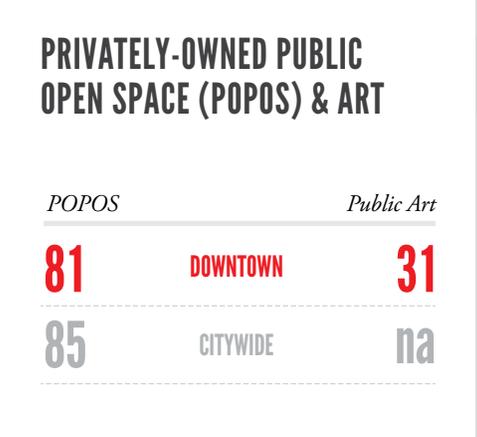


■ Downtown    ■ Citywide

# PART 2: Infrastructure (cont'd)



SEE TABLE 18



SEE TABLE 20



SEE TABLE 19

# Introduction

## The Downtown Plan

The Downtown Plan's central premise is that a compact, walkable, and transit oriented downtown will create a notable, lively, and attractive center for the City and the region. The Plan also capitalizes on the City's core assets, including its transit infrastructure, visitor economy, and vibrant diversity.

The Plan's vision is to create a vibrant district known the world over as a center of ideas, services, and trade, and as a place rich in human experience--characteristics that are true of all great cities. The essential components of such places are a compact mix of activities, historical values, distinctive architecture, and urban form that engenders the special excitement of a world city. To achieve this vision, the Plan's objectives and policies guide land use decisions to create the physical form and pattern of a vibrant, compact, pedestrian-oriented, livable, and vital downtown.

The *Downtown Plan* emerged from growing public awareness during the 1970s that development threatened the essential character of downtown San Francisco. The issue often appears as a conflict between civic objectives to foster a vital economy on the one hand and those aimed at forming the urban patterns, structures, and unique physical identity of a vibrant downtown on the other hand. This physical identity in turn reinforces economic vitality and informs cultural identity. The Downtown Plan supports decisions that create the conditions for a great place and a vital economy.

The *Downtown Plan* is one Area Plan of the General Plan. The Downtown area is defined as the C-3-zoned district (see Map 1). Some of the *Plan's* policies refer to a less precisely defined area germane to housing and transportation policies that have wider effects geographically. This wider area is labelled the Greater Downtown area in Map 1, and is mostly in the South of Market area (SoMa) and the northeast quadrant of

the City. Some policies, such as those involving net new housing units, are citywide goals.

The *Downtown Plan* guides development decisions and public policy actions; it creates programs designed to improve services and infrastructure. When the Board of Supervisors approved the *Downtown Plan* in 1985, the Board also required that the Planning Department prepare monitoring reports periodically to track performance and make adjustments if required. This document is one such report as described below.

## Report Structure

This *Downtown Plan Annual Monitoring Report 2012* summarizes business and development trends affecting downtown San Francisco as required by SF Administrative Code, Chapter 10E. The report covers the 2012 calendar year or fiscal years 2011-12 or 2012-13 depending on data available. This annual report notes changes in the amount of commercial space, employment, housing production, parking supply, collection and use of fees and other revenues that occurred over the year related to the objectives of the *Downtown Plan* and statutory monitoring requirements.

Part 1 of this report, "Commercial Space, Employment and Revenue Trends," highlights the growth that the *Downtown Plan* enabled, and discusses the production of new commercial space, employment activity, and recent sales tax revenues on both a citywide and Downtown basis. Part 2, "Downtown Support Infrastructure," reviews housing, transportation, POPOS and Public Art – key elements supporting the functioning of the Downtown core.

The 25-year report, *25 Years: Downtown Plan Monitoring Report 1985-2009*, contains more detailed information and assessment. Previous annual and five-year reports are available on the Department's web site.<sup>1</sup>

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<sup>1</sup> See the Planning Department's Home Page, Resource Center main menu tab, and Downtown Monitoring Reports at [http://www.sf-planning.org/index.aspx?page=1663#downtown\\_report](http://www.sf-planning.org/index.aspx?page=1663#downtown_report)



**Map 1. Downtown C-3 Zone**

## Data Sources

This annual report includes information from the Department’s Housing Inventory, Commerce and Industry Inventory, and Pipeline quarterly report. It also includes information from many other sources, including the state Employment and Development Department (EDD), the SF Municipal Transportation Agency (SFMTA), Dun and Bradstreet business data, Cassidy Turley Research Services, Cushman & Wakefield Research Services, and information gathered from the SF Department of Building Inspection, and the SF Office of the Controller.

# PART 1: Commercial Space, Employment, & Revenue Trends

Originally, the *Downtown Plan* guided commercial development and most new office growth in San Francisco to the Downtown C-3 District straddling Market Street (see Map 1). The *Plan* also expanded new commercial development to the South of Market (SoMa). The *Plan*'s annual limit on new office space, institutionalized by a voter initiative passed in 1986, helped to manage the pace of new office development and reduce speculation and boom-bust land use development issues.

Recent planning south of Market Street encourages office, residential density, and new mixed-use neighborhoods to the south of the Downtown C-3 District. The Transit Center District Plan, which overlaps the C-3 District, also includes some office and residential development guidelines. Mission Bay and Candlestick Point are two areas where more recent planning has directed substantial office development. The Rincon Hill Plan directs housing even further south of the C-3 district. The Eastern Neighborhoods Area Plans (ENAPs) include rezoning in the southeast quadrant of the City to accommodate the majority of non-downtown/non-high-rise office growth. In addition, the ENAPs will establish new mixed-use residential neighborhoods encompassing light industrial and

production-distribution-repair, retail, smaller offices, and institutional uses. They will not be locations for dense, downtown high-rise office developments. As a result, future high-rise office development will remain concentrated in and around the Downtown Plan Area.

## Commercial Space

### Pipeline Development Projects

As of the fourth quarter of 2012, there were over 708 projects in the citywide development project “pipeline.”<sup>1</sup> Two-thirds of the projects (75%) were exclusively residential; one-fifth (14%) were mixed-use with both residential and commercial components. The remaining nine percent (11%) of the projects were exclusively commercial (office, retail/entertainment, hotel, or PDR).

If all the commercial projects were completed, they would add 14.7 million square feet (msf) of commercial space (Table 1). This would include 9.9 msf of office space and 3.1 msf of retail space added to San Francisco’s existing 112 msf of office space and 56 msf of retail space.<sup>2</sup>

1 Planning Department, *Pipeline Report*, Quarter 4, 2012.

2 CoStar Group, Office Report and Retail Report, Quarter 1, 2011. No new projects have been completed (as of June 2012).

**Table 1.**  
Commercial  
Project  
Pipeline

Area	Total	%	Office	%	Retail	%
Candlestick	4,110,000	28%	2,756,250	28%	750,000	24%
Transbay	3,022,111	21%	2,981,433	30%	50,908	2%
Mission Bay	2,274,942	15%	2,195,427	22%	73,515	2%
Downtown C-3 Area	1,409,073	10%	724,759	7%	506,562	16%
Wider Downtown**	2,099,453	14%	775,154	8%	918,896	30%
Rest of City	1,801,362	12%	484,767	5%	798,876	26%
<b>TOTAL</b>	<b>14,716,941</b>	<b>100%</b>	<b>9,917,790</b>	<b>100%</b>	<b>3,098,757</b>	<b>100%</b>

\* As defined in the Pipeline Report at <http://www.sfplanning.org>.

\*\* Broadly composed of West and East SoMa, South of Market, Rincon Hill, Showplace/Potrero Hill, and Market Octavia on either side of Market Street.

Source: Planning Department, *Pipeline Report*, Quarter 4, 2012

The Downtown C-3 area (Table 1) accounts for about 1.4 msf, or 10% of proposed commercial space in the pipeline. The Downtown C-3 and Transbay pipeline projects together would add 4.4 msf of commercial space, or 31% of the pipeline to the downtown area.<sup>3</sup> The wider Downtown area is composed of districts adjacent to the C-3 Area along Market Street. It would add almost 2.1 msf or 14% of the pipeline commercial space. Together, the Downtown C-3 Area, Transbay, and the wider Downtown area along Market Street account for nearly half of projected pipeline commercial development (45%). Candlestick Point and Mission Bay would add about 4.1 msf (28%) and 2.2 msf (15%), respectively. The Rest of the City would receive about 1.8 msf of commercial development, or 12% of the pipeline project total. The non-residential commercial projects include office, retail, visitor (hotel and entertainment), production-distribution-repair (PDR), and cultural-institutional-educational (CIE) land uses.

Of the total 14.7 msf of commercial space in the pipeline, 67% are office land uses and 21% are retail. Only about 4% or 585,000 nsf of pipeline development is under construction. Another 6% of the pipeline projects have received building permit approval or have been issued a permit (844,100 nsf), and should begin construction soon. The majority of the pipeline projects (90%) are still in the early stages of approval, with Planning applications filed (33%) or approved (40%), and building permits filed but not yet approved with the Department of Building Inspection (17%).

Projects under construction are typically ready for occupancy within two years. Projects not yet under construction but approved by the Planning Department are usually available for occupancy within two to four years. Projects filed for planning approval take two to four or more years to complete, depending on complexity.

### Office Space

Close to two-thirds of the City's office space is located in the Downtown C-3 District (Table 2). At 343 acres (or slightly more than half a square mile), it represents one of the densest concentrations of office space in the country.

**Table 2.**  
**Existing Office Space**

Area	Square Feet
San Francisco	112,300,000
C-3 District	72,200,000
% office in C-3 District	64%

Source: Costar Group.

San Francisco's office vacancy rate declined to 8.9% at year end 2012 after peaking at over 20% in 2002 (Table 3). At 8.7%, the Downtown Financial District continued decline below the citywide vacancy rate.

Much of this activity is due to continued technology sector growth, but also to that in the banking and professional services sectors.<sup>4</sup> Salesforce dominated leasing activity in 2012, committing to three 4th-quarter leases totalling 780,000 sf. The mobile credit card firm, Square, signed for 246,000 sf at 1455 Market Street. Activity in other sectors included Macy's.com, AirBnB, Riverbed Technologies, BofA/ML, and the City and County of San Francisco.

A total of 8.5 msf was leased in 2012, surpassing rates set during the first tech boom of the late 1990s. Market absorption of existing space in new leases amounted to 700,000 sf. Industry forecasts indicate continuation of a strong market in 2013.

There is approximately 725,000 nsf of office space in the project pipeline for the Downtown C-3 District (Table 1). In addition, there is about 3.7 million net sf (mnsf) of office development between the Downtown C-3 Area and the TransBay District. In the Wider Downtown Area<sup>5</sup> there is approximately 775,000 nsf of office development in the pipeline, along with another 485,000 nsf feet in the Rest of the City and another 2.76 mnsf in the Candlestick Point development proposal.

By year end 2012, Downtown office rents increased to an average of \$52.21 per square foot, up 23% from \$42.50 per square foot in 2010.<sup>6</sup> A strong rental market is expected to continue in 2013.

<sup>3</sup> The Downtown C-3 district includes a part of the Transbay Project.

<sup>4</sup> Cushman & Wakefield, MarketBeat, Office Snapshot, San Francisco, Q4 2012.

<sup>5</sup> Downtown C-3, Transbay, Mission Bay, East SoMa, Rincon Hill, Showplace/Potrero areas.

<sup>6</sup> Cushman & Wakefield, MarketBeat, Office Snapshot, San Francisco, Q4 2011 and 2012. Rates are for all building classes, gross rental rate, full service.

**Table 3.**  
**Office Vacancy**

Area	2010	2011	2012	% Change 2011-12
San Francisco	14.5%	11.0%	<b>8.9%</b>	-2.1 pts
Downtown Financial District	13.9%	10.7%	<b>8.7%</b>	-2.0 pts
Other Downtown*	15.5%	11.4%	<b>6.6%</b>	-4.8 pts
Bay Area	16.6%	13.8%	<b>13.4%</b>	-2.8 pts

\* Includes Jackson Square, South Beach, Union Square, and Yerba Buena.

Source: Cassidy Turley, Office Market Snapshot, San Francisco, First Quarter, 2013. For CBD, used Cushman & Wakefield, MarketBeat, Office Snapshot, San Francisco, Q4 2012.

**Table 4.**  
**Retail Vacancy**

Area	2010	2011	2012	% Change 2011-12
San Francisco	6.6%	5.1%	<b>4.3%</b>	-0.8 pts
Downtown*	10.6%	6.7%	<b>6.0%</b>	-0.7 pts

\* Labeled as "City Center." Includes the Union Square area, the retail core of the C-3 zone.

Source: Terranomics, San Francisco County, Shopping Centers Report, Q1 2013.

**Table 5.**  
**Hotel Occupancy and Rate**

	2010	2011	2012
Average Occupancy	76.0%	79.0%	<b>80.5%</b>
Average Daily Room Rate	\$137.00	\$155.00	<b>\$175.00</b>

Source: Cushman & Wakefield, MarketBeat Retail Snapshot, San Francisco, Q4 2012. Hotel Market Trends Table; also, SF Travel Association, Smith Travel Research.

### Retail Space

The Downtown C-3 Area contains about 8.7 msf for retail space or 16% of San Francisco's 56 msf of retail space, with about 1.4 msf are in the Downtown Core.<sup>7</sup> San Francisco's downtown is the Bay Area's preeminent retail hub, and it serves local, regional, and visitor shopping needs. However, the majority of retail space in San Francisco is outside the downtown area, mostly along the City's many neighborhood commercial streets and shopping areas.

As shown in Table 4 above, the retail vacancy rate for the Downtown C-3 Area at the end of 2012 was 6.0%, higher than the Citywide average of 4.3%. Compared to 2011, vacancy rates declined for the Downtown C-3 area and citywide from 6.7% and 5.1%, respectively.

Approximately 507,000 net sf (nsf) of retail space is in the development pipeline for the Downtown C-3 area,<sup>8</sup> with another 992,000 nsf anticipated for the wider Downtown area<sup>9</sup> and 3.1 mnsf citywide. However, the majority of these pipeline projects are in the early

stages of permitting. Only about 5,000 square feet are under construction in the Downtown C-3 area, approximately 14,500 nsf in the wider Downtown area, and about 32,700 nsf citywide.

### Hotel Space

San Francisco has over 215 hotels with a total of 33,640 hotel rooms.<sup>10</sup> Just over 20,000 or 60% of these rooms are located in the Downtown C-3 District and within walking distance of the Moscone Convention Center. About 1,200 hotel rooms were added between 2005 and 2008.<sup>11</sup> An additional 1,700 rooms are in the pipeline, of which 200 have a 2012 opening target.

Both hotel occupancy and average daily rates increased in 2012 (Table 5). Average hotel occupancy increased to about 81%, up from 76% two years ago. Average daily room rates increased to \$175 per room compared to \$137 in 2010.

7 Co-Star, Retail Report, San Francisco Retail Market, 1st Quarter 2011. The Downtown Core is composed of the traditional Financial District north and south of Market Street, while the larger C-3 area adds Union Square, Yerba Buena, and the Civic Center areas.

8 Planning Department, Pipeline Report, Quarter 4, 2012.

9 The wider Downtown consists of the C-3, Transbay, Mission Bay, East SoMa, Rincon Hill, Showplace/Potrero areas.

10 San Francisco Travel Association ([www.sanfrancisco.travel/research/](http://www.sanfrancisco.travel/research/)), June 20, 2013. Room figures from September 2012 survey.

11 PDK Consulting. See .San Francisco Travel Association ([www.sanfrancisco.travel/research/](http://www.sanfrancisco.travel/research/) and <http://media.sanfrancisco.travel/documents/Occupancy+and+ADR+December+2011.pdf>).

## Employment

San Francisco employment grew 4 % in 2012, or by approximately 22,890 jobs. As of the first quarter of 2012, San Francisco had approximately 572,234 jobs (Table 6). Within this overall gain, employment in hotel and private households declined by 4% and 1%, respectively. Office, retail, PDR, and CIE, grew by 6%, 5%, 3%, and 3%, respectively.

As of the first quarter of 2012, approximately 39% of all San Francisco employment was located in the Downtown C-3 zone. Downtown employment did not change noticeably from 2011 levels. The majority of office jobs (58%) and hotel jobs (71%) continue to be located Downtown.

### Office Employment

The downtown Financial District remains the center of office employment in San Francisco. As of the first quarter of 2012, there were about 228,000 office jobs in San Francisco (Table 6). Of these jobs, about 137,875 were located in the Downtown C-3 District (Table 7), or 58% of total office employment citywide.

Downtown office employment declined 1% from 2012, or by about 1,287 jobs. Downtown San Francisco maintains the greatest concentration of office jobs in the region including financial, legal, and other specialized business services. Many of these jobs continue to be in the financial, insurance, and real estate sectors.

**Table 6. Employment - Citywide**

Land Use	2010	2011	2012	% Change 2011 - 2012
Office	211,050	214,476	<b>228,057</b>	6%
Retail	98,139	97,373	<b>101,845</b>	5%
Production, Distribution, Repair (PDR)	72,967	71,077	<b>73,453</b>	3%
Hotel (& Entertainment)	17,568	17,313	<b>16,683</b>	-4%
Cultural, Institutional, Educational (CIE)	126,208	128,248	<b>131,482</b>	3%
Private Households	19,819	20,857	<b>20,714</b>	-1%
<b>TOTAL</b>	<b>545,751</b>	<b>549,344</b>	<b>572,234</b>	<b>4%</b>

*Note:* variations from other published employment numbers are due to rounding and EDD confidentiality requirements).

*Source:* State of California Employment Development Department (EDD), 2010 is 2nd Quarter, 2011 and 2012 are 1st Quarter.

**Table 7. Employment - Downtown C-3 Zone**

Land Use	2010*	2011**	2012	% Change 2011 - 2012	C-3 Share of SF Employment 2012
Office	124,810	139,162	<b>137,875</b>	-1%	60%
Retail	25,720	27,484	<b>28,019</b>	2%	28%
Production, Distribution, Repair (PDR)	17,320	18,505	<b>20,054</b>	8%	27%
Hotel	11,620	12,077	<b>11,339</b>	-6%	68%
Cultural, Institutional, Educational (CIE)	23,410	25,571	<b>25,384</b>	-1%	19%
Private Households	1,840	2,676	<b>1,935</b>	-28%	9%
<b>TOTAL</b>	<b>204,720</b>	<b>225,475</b>	<b>224,606</b>	<b>0%</b>	<b>39%</b>

*Note:* variations from other published employment numbers are due to rounding and EDD confidentiality requirements).

*Source:* State of California Employment Development Department (EDD), 2010 is 2nd Quarter, 2011 and 2012 are 1st Quarter.

### **Retail Employment**

San Francisco's high concentration of regional-serving retail establishments continue to be a primary destination offering not only goods and services, but a unique urban experience. Visitor traffic in particular represents a large share of downtown San Francisco's sales receipts.

As of the first quarter of 2012, there were 101,845 retail jobs in San Francisco (Table 6). About 28,019 of these jobs could be found in the C-3 District (Table 7), or about 28% of total retail jobs citywide.<sup>12</sup> This is roughly the same share of retail jobs reported in the 2011.

### **Hotel Employment**

The majority of hotel jobs are located downtown. As of the first quarter of 2012, there were over 16,683 hotel jobs in the City. Approximately 11,339 of these jobs were in the C-3 District or about 68% of all hotel jobs citywide. Hotel jobs decreased 4% Citywide and 6% Downtown compared to 2011.

## **Revenue**

This section reports tax revenues from business taxes (including registration and payroll), property taxes (including transfer tax and annual tax), sales and use taxes, and the hotel tax for the 2012-2013 fiscal year (FY).<sup>13</sup> The revenue information reported reflects deposits to the City's general fund, rather than the total amount of all revenues the City received, and is reported in nominal dollars.<sup>14</sup> In general, the FY 2012-13 budget assumed continued moderate recovery in tax revenues throughout the fiscal year. Tax revenues projected to recover beyond budgeted levels include property, payroll, and property transfer taxes. These gains are partially offset by shortfalls in federal subventions, access line tax, and charges for services.<sup>15</sup>

### **Business Taxes**

Business tax revenue (Table 8) in FY 2012-13 is estimated at \$488.1 million, up 19% from \$409.8 million in FY 2012-13. Total business tax revenue is comprised of business payroll tax and registration tax.

Business payroll taxes assess the payroll expense of persons and associations engaging in business in San Francisco and represent the vast majority of business taxes collected. This tax imposes a fee on all businesses that employ or contract with one or more employees to perform work or render services within the city. In FY 2012-13, the Controller's Office estimated that it will collect \$478.8 million in payroll taxes, up 19% from \$401.4 million in FY 2011-12.

Business registration tax is an annual fee assessed for general revenue purposes on all business in the City. The Controller's Office estimates that approximately \$9.3 million in business registration fees will be collected in FY 2012-13, up 11% from \$8.4 million in FY 2011-12.

### **Property Taxes**

Real property taxes (Table 9) are the largest single source of tax revenue for the City. The Controller's office expects them to remain stable this fiscal year 2013 and that property transfer taxes will increase.<sup>16</sup> Together, an estimated \$1.34 billion in property related taxes will be collected in FY 2012-13, up 10% from 1.22 billion last year.

Real property taxes allocated to the general fund in FY 2012-13 are estimated at \$1.09 billion dollars, up 3% from \$1.06 billion in FY 2011-12 (Table 9).

Property transfer taxes are estimated to increase during the reporting period. Projected collections for FY 2012-13 are estimated to be about \$245.9 million, up 51% from \$162.5 million in FY 2011-12. (Table 9). Unlike real property taxes, which are collected annually and based on property valuation assessments, property transfer tax is highly volatile because it is collected only at the time of sale and it is based on sales price.

### **Sales Tax**

Sales tax revenues (Table 10) fluctuate with economic conditions and reflect consumer confidence and spending. Of the 8.75% sales tax rate, San Francisco receives 1% with the rest going to the State and other districts. A portion of this revenue is deposited in the

12 For more information on regional trends, business formation and relocation see the *Commerce and Industry Inventory* at <http://www.sfplanning.org>.

13 Fiscal Year 2013 begins on July 1, 2012 and ends on June 30, 2013.

14 All revenues would include money allocated by law to specific uses and not available for general city services and expenses.

15 City and County of San Francisco, Controller's Office, FY 2012-13 Nine-Month Budget Status Report, May 9, 2013, p 7.

16 Ibid.

City's general fund with the balance allocated by law for specific programs and services.

As shown in Table 10, FY 2012-13 sales tax collections are expected to increase 15% to \$121.9 million from \$106 million in FY 2011-12. An estimated 20% of sales tax revenues are collected in the Downtown C-3 zoned area, which continues to account for roughly one-quarter of general retail store sales tax and business to business sales tax.

### Hotel Tax

The hotel tax (Table 11) remained at 14% for the 2012-13 fiscal year reporting period. A substantial portion of this revenue is dedicated to the Moscone Convention Center, grants for the arts, museums, and other visitor amenities with the balance deposited into the City's general fund.

As shown in Table 11, \$190.9 million in hotel taxes are expected to be collected and deposited into the general fund in fiscal year 2012-13. This represents a 7.6% increase from FY 2011-12, when \$177.4 million was collected.

**Table 8. Business Taxes**

Revenue Source (\$ Millions)	FY 2010-11	FY 2011-12	FY 2012-13*	% Change 2012-13
Payroll	\$383	\$401.4	<b>\$478.8</b>	19.3%
Registration	\$8.1	\$8.4	<b>\$9.3</b>	10.7%
<b>TOTAL</b>	<b>\$391.1</b>	<b>\$409.8</b>	<b>\$488.1</b>	<b>19.1%</b>

\* Estimates from Office of the Controller, FY 2012-13 Nine-Month Budget Status Report, May 9, 2013.

**Table 9. Property Taxes**

Revenue Source (\$ Millions)	FY 2010-11	FY 2011-12	FY 2012-13*	% Change 2012-13
Property Tax	\$1,061.9	\$1,060.0	<b>\$1,094.0</b>	3.2%
Property Transfer Tax	\$135.2	\$162.5	<b>\$245.9</b>	51.3%
<b>TOTAL</b>	<b>\$1,197.1</b>	<b>\$1,222.5</b>	<b>\$1,339.9</b>	<b>9.6%</b>

\* Estimates from Office of the Controller, FY 2012-13 Nine-Month Budget Status Report, May 9, 2013.

**Table 10. Sales and Use Taxes**

Revenue Source (\$ Millions)	FY 2010-11	FY 2011-12	FY 2012-13*	% Change 2012-13
Sales and Use Tax	\$106.3	\$106.0	<b>\$121.9</b>	15.0%

\* Estimates from Office of the Controller, FY 2012-13 Nine-Month Budget Status Report, May 9, 2013

**Table 11. Hotel Room Tax**

Revenue Source (\$ Millions)	FY 2010-11	FY 2011-12	FY 2012-13*	% Change 2012-13
Hotel Room Tax	\$158.9	\$177.4	<b>\$190.9</b>	7.6%

\* Estimates from Office of the Controller, FY 2012-13 Nine-Month Budget Status Report, May 9, 2013

## PART 2: Downtown Support Infrastructure

This section discusses the *Downtown Plan's* housing and transportation targets. The *Downtown Plan* was developed with the assumption that significant employment growth and office development would occur and that this growth must be managed to enhance—not detract—from the Downtown. In the absence of new policies and programs, automobile traffic would continue to grow and important historic buildings located north of Market Street could be lost.

The Plan established a special use district around the Transbay Terminal to shift office construction to that area as a means of reducing further disruption of the financial center north of Market. As an incentive to save historic buildings and to shift office development to the planned area south of Market Street, the Plan enabled owners of buildings designated for preservation to sell development rights to developers in the special use district. New commercial development would provide revenue to partially cover the costs of urban service improvements. Specific programs were created to address needs for additional housing, transit, child care and open space, as were specific targets for new housing production and transportation management.

In December 2010, the Transfer of Development Rights ordinance was amended by the Board of Supervisors to allow eligible owners of historic buildings to sell development rights to any C-3 zoned lot.

### Housing

#### Residential Units Completed

Citywide 2012 housing production of about 1,290 net new units is a substantial increase over last year's production of 269 units (Table 12), and is one indicator of the economic recovery. The net change in units accounts for alterations, conversions and demolitions.

In the Downtown C-3 District, a total of 197 (rounded to 200) new units were constructed, while 690 new units were constructed in SoMa and another 400 units were produced in the rest of the City (Table 13).

Housing production in 2012 met the *Downtown Plan's* annual goal of 1,000 to 1,500 net new housing units citywide.

**Table 12.**  
Net Housing Change:  
Citywide

Change	2010	2011	2012	% Change 2011-12
New construction	1,082	348	764	120%
+ alterations, conversions	318	5	650	na
- less demolitions	-170	-84	-127	na
<b>Total net change</b>	<b>1,230</b>	<b>269</b>	<b>1,287</b>	<b>378%</b>
% in C3	23%	-12%	15%	na

\* Net change accounts for units gained or lost due to alterations, conversions and demolitions.  
Source: SF Planning Department, *Housing Inventory*.

**Table 13.**  
Net Housing Change:  
Downtown

Area	2010	2011	2012	% Change 2011-12
Downtown C-3 Zone	281	-31	197	735%
SoMa*	150	21	690	3,186%
Rest of City	799	279	400	43%
<b>TOTAL</b>	<b>1,230</b>	<b>269</b>	<b>1,287</b>	<b>378%</b>

\* Housing Inventory SoMa planning district, excluding C-3.  
Source: SF Planning *Housing Inventory*.

### Residential Pipeline Projects

As of the fourth quarter 2012, the citywide pipeline of residential development projects under construction or seeking planning approval and building permits contained a total of about 43,600 residential units, up 3% from 42,400 units in 2011. The top five areas with the most proposed units are Candlestick, Treasure Island, Park Merced, Downtown, and Market Octavia (see Table 14).

The permit status of the proposed units is as follows: 9% are under construction (3,931 units); 6% hold a building permit that has been approved, reinstated, or issued, 7% filed for a building permit, 64% have planning approval and need to seek a building permit, and 14% filed for planning approval.

**Table 14. Residential Project Pipeline (net units)**

Rank	Area	Units	% Share
1	Candlestick	10,237	25%
2	Treasure Island	7,800	18%
3	Park Merced	5,677	14%
4	Downtown	3,885	9%
5	Showplace Square	2,660	5%
	Rest of city	13,322	29%
	<b>TOTAL</b>	<b>43,581</b>	<b>100%</b>

Source: Planning Department, Pipeline Report, Quarter 4, 2012, unpublished. For published reports, see <http://www.sf-planning.org/index.aspx?page=1691> (scroll down for earlier reports).

It should be noted that approximately 24,000 units (more than 50%) are associated with the three large, project-plans that will be built out over a longer period (Candlestick, Treasure Island, Park Merced). These units have all received planning approval.

The remaining approximately 19,600 units of smaller projects would be expected to be built out under the more typical time frames: two years from beginning construction and two to four years from planning approval. Should they be completed within four years (by 2017), that would be close to 5,000 units per year on average, which is almost two times the maximum annual rate in any of the past 20 years. If production were to follow the City's historical average production rate of 1,530 units per year, the 19,900 units associated with smaller projects would be expected to be built out over 13 years by 2026.

In Table 14, the Downtown District ranks fourth in number of proposed units (but first of all areas with typical project proposals and not that of large project-plans), with 3,885 units or 9% of the total. Of those units, 45% are under construction, 2% have an approved or issued building permit, 8% filed for a building permit, 15% have planning approval (567), 29% (1,123 units) filed for planning approval.

### Jobs Housing Linkage Program (JHLP)

Prompted by the *Downtown Plan*, the City determined that employment growth associated with large office development projects would attract new residents and therefore increase demand for housing. In response, the Office Affordable Housing Production Program (OAHP) was established in 1985 to require large office developments to contribute to a fund to increase the amount of affordable housing. In 2001, the OAHP was re-named the Jobs-Housing Linkage Program (JHLP) and revised to require all commercial projects with a net addition of 25,000 gross square feet or more to contribute to the fund.

Due to the reduction in commercial development as a result of the 2008-2009 economic recession, the program collected no revenue from fiscal year 2008 through 2011. This fiscal year (2012-13), \$7.8 million was collected (Table 15). Since the program was established in 1985 however, a total of \$82 million has been collected to partially subsidize the construction of over 1,000 units of affordable housing.

**Table 15. Jobs-Housing Linkage Fees Collected**

Fiscal Year	Revenue
2010-11	\$0
2011-12*	\$1,950,905
2012-13*	\$7,814,015
<b>TOTAL</b>	<b>\$9,764,920</b>

Source: Department of Building Inspection as of May 2013

## Transportation

This section reports on *Downtown Plan* transportation targets including an inventory of parking spaces, vehicle occupancy rates, peak period transit ridership, commute mode split, and fees collected by the Transit Impact Development Fee (TIDF) as required by the Downtown Plan monitoring ordinance.

### Parking Inventory

Downtown Plan policies discourage new long-term commuter parking facilities (surface lots and garages) in and around the periphery of downtown. While no new long-term parking facilities have been built Downtown since Plan adoption, some long-term commuter parking facilities have been added at the periphery, primarily in the areas beneath the Interstate 80 approaches to the Bay Bridge.<sup>1</sup>

Although the supply of off-street parking in new buildings (see Table 16) continues to grow with new development, as allowed under the Planning Code, the Downtown Plan policies slowed the overall growth in long-term commuter parking facilities (surface or garage) in and at the periphery of Downtown. Thus, the *Downtown Plan's* goal to limit the number of long-term commuter parking facilities to the capacity that existed at Plan adoption has generally been achieved.

**Table 16.**  
Net Parking Change -  
Downtown C-3 Zone\*

Year	Net Parking
2010	305
2011	282
2012	0
<b>TOTAL</b>	<b>587</b>

\* Approved projects only

In terms of recent changes to the supply of parking, available information only includes projects approved by the Planning Commission, which likely underestimates the number of spaces added. For example, projects permitted by right under the Planning Code, including those in past redevelopment areas, typically do not require Planning Department approval and are not counted as a result.

There are over 33,430 off-street parking spaces in the Downtown C-3 district, about 20% of the 166,520 off-street parking spaces citywide.<sup>2</sup> The net addition

of approved parking spaces in the C-3 district in 2010 and 2011 reflected the slow recovery. In the absence of new downtown office development project approvals in 2012, there were no net new parking space approvals in the Downtown C-3 Area (see Table 16).

### Peak Period MUNI Transit Ridership

According to available Automatic Passenger Count (APC) data collected by the San Francisco Municipal Transportation Agency (SFMTA) in Fiscal Year 2012 (FY 2011-12), the downtown area continues to maintain the highest number of peak period transit trips in the city with more than one-third having downtown as their origin or destination. Of the approximately 680,000 total weekday boardings in FY2012, about 282,400 (42%) occurred during the peak period (4:00-6:00 pm; Table 17). Of these peak period trips, approximately 96,435 had downtown as their origin or destination (or 34% of total weekday boardings)

**Table 17.**  
PM Peak Period MUNI Transit Ridership  
to and from Downtown

Area	Ridership	% of Total Trips
San Francisco	282,400	100%
Downtown	96,435	34%

Source: Municipal Transportation Agency (MTA), FY2012.

### Downtown Commute Mode Split

Another goal of the *Downtown Plan* is that transit share would increase from 64% when the Plan was adopted in 1984 to 70% by 2000 for all peak period commute trips to and from the Downtown C-3 District. It is not clear whether this goal has been met, although available information suggests that transit share has increased.

Commute mode information for workers with jobs located in the Downtown C-3 District was not available as of the writing of this report, although it will be available this fall. Data from the most recent Transportation Management Association's Commuter Behavior Survey (2009) estimated transit ridership at 72% for the approximately 48,400 employees in the 52 buildings that must comply with the City's transporta-

1 25 Years Downtown Plan Monitoring Report 1985-2009, pp. 26, 85, 86.

2 SFMTA, Parking Census 2011. This count excludes long-term commuter parking located outside the C-3 District, at the periphery of Downtown, primarily in the areas beneath the Interstate 80 approaches to the Bay Bridge.

tion demand management program for buildings in the Downtown Financial District core, where transit share is highest. However, this result represents only about 25% of the workers in the C-3 District.

Mode share data is available for a subset of all commute trips to SF jobs/ That subset is the within-city MUNI trips for residents only (not workers). It captures more resident behavior than commuter behavior. This subset of data is available for Superdistrict 1, the much larger area surrounding the Downtown C-3 Zone covering the northeastern portion of San Francisco (see Map 2). This report uses this available data to approximate transit and mode share behavior. According to the 2007-2011 American Community Survey (ACS), most Superdistrict 1 employed residents used transit to get to work (33%), although almost an equal share walked (31%), which is a remarkably high share. One in four used a car (24%), 2% used a bicycle, 2% used other modes, and 8% worked at home without generating any commute trips.

Although transit share in the other three superdistricts is about the same (33%, 35%, and 27% for Superdistricts 2, 3, and 4, respectively), the walk share is substantially lower (8%, 5%, and 4%, respectively) and the car share is substantially higher (43%, 50%, and 60%, respectively) in those other districts. This data illustrates the expected connection between the proximity of residence and work location and mode choice.

In comparison to the 2000 Census data, transit and walk shares for employed residents of Superdistrict 1 remained stable at the same 33% and 31%, shares, respectively, in 2011.<sup>3</sup> The share of car use declined from 28% to 24%. Bike share was unchanged at 2%, although hidden in this share is a large increase in riders (60% or 600 in 2011).<sup>4</sup> The share of persons working at home is small, but up from 5% to 8%.

### Vehicle Occupancy Rate

The *Downtown Plan* sought to increase ridesharing into downtown from 1.48 persons per vehicle in 1985 when the Plan was adopted, to 1.66 persons per vehicle by the year 2000. Although ridesharing data for the Downtown C-3 is not available, indicative information is available for the surrounding Superdistrict 1 (see Map 2).

3 US Census, American Community Survey 2007-2011.

4 Bicycle commuting is increasing citywide as discussed in the SFMTA reports: State of Cycling 2012 and the 2011 City Bicycle Count Report.

In Superdistrict 1, the average vehicle occupancy for workers has been declining instead of increasing. In 1980, five years before the *Downtown Plan's* adoption, vehicle occupancy was 1.28 passengers per car. In 1990 it dropped to 1.22. By the 2000 Census, vehicle occupancy had dropped to 1.21 for workers and 1.13 for residents (Table 18).<sup>5</sup> These figures compare with year 2000 vehicle occupancy rates of 1.18 for all individuals working in San Francisco, 1.13 for all San Francisco residents (and 1.10 regionally).<sup>6</sup>

Vehicle occupancy rates are now available from the 2011 (2007-2011) American Community Survey (ACS) for the City of San Francisco and the Bay Area. For smaller areas, such as Superdistrict 1 and the Downtown C-3, information is only available for residents. These estimates however, continue to show a drop in average vehicle occupancy from 1.13 in 2000 to 1.09 in 2011 for Superdistrict 1 employed residents. For census tracts covering the Downtown/Civic Center neighborhood, the rate was 1.08 occupants per vehicle for employed resident commute trips to work.

### Transit Impact Development Fee (TIDF)

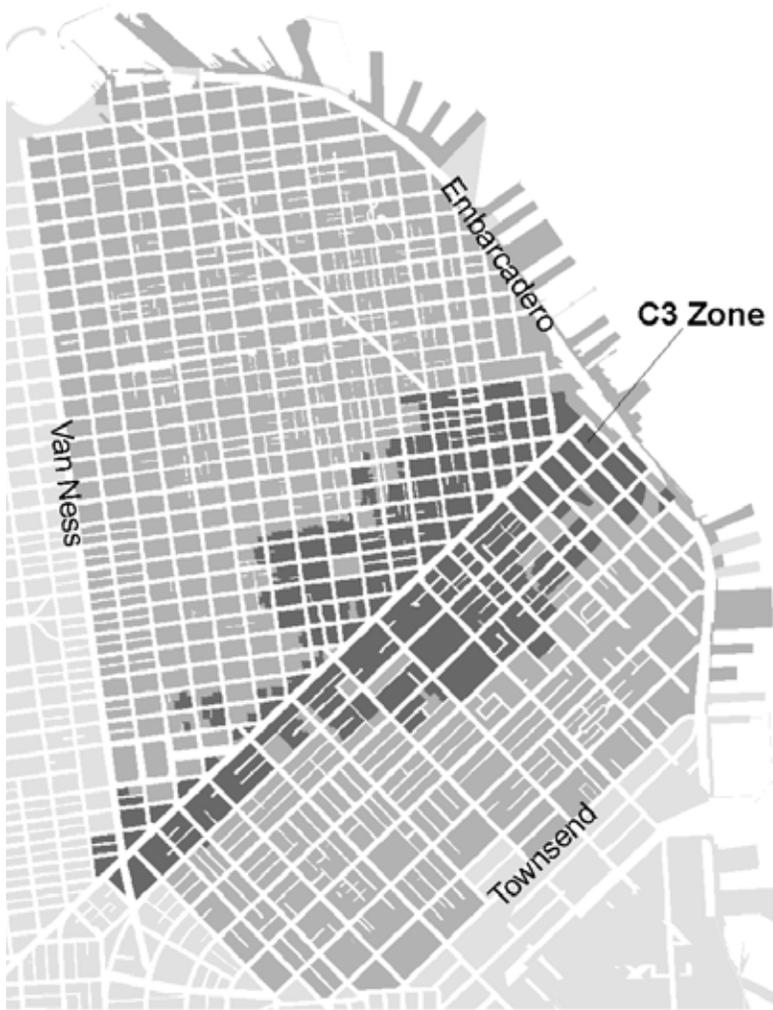
In 1981, as a precursor to the *Downtown Plan* and responding to a substantial increase in downtown office development, San Francisco enacted a fee to recover a portion of additional transit operating and capital costs incurred by this growth. Initially, all new office developments were required to pay \$5 per square foot of office space to cover the added transit service to downtown office buildings. In 2004, the Municipal Transportation Agency (MTA) modified this fee to include all proposed non-residential developments in San Francisco.

San Francisco has collected about \$7.8 million in TIDF revenues to date for fiscal year 2012-13 (Table 19). This represents about 5% of the total \$152.5 million in TIDF revenues the fee has generated since its inception in 1981 through the FY 2012-13 estimate in Table 19.<sup>7</sup>

5 The vehicle occupancy rate is the average number of individuals riding in a vehicle. The lowest possible rate is 1, where all vehicles are single occupant.

6 Occupancy rates for Superdistrict 1 are from Tables 17, 18 and 19 of the 2000 Census Data Summary #5 (Journey-to-Work in the San Francisco Bay Area), released in June 2005. These rates are for commute trips to work and do not necessarily reflect peak period patterns.

7 This total also includes \$5.5 million in interest charges on TIDF fees paid by installments between 1983 and 2001. See "25 Years--Downtown Monitoring Report," Table 16. The Ordinance was enacted in 1981. Collections from 1983 through FY 2008-09 totaled \$137,436,791. The additional \$5,257,081 collected in FY 2009-10 through 2011-12 (estimate) in Table 19, above, brings the total collected from inception through the FY 2011-12 estimate to \$142,693,872.



**Map 2. Superdistrict 1**

**Table 18. Average Vehicle Occupancy**

Area	Census 2000		ACS 2011***	
	Workers	Residents	Workers	Residents
San Francisco	1.18	1.13	1.15	1.11
Superdistrict 1*	1.21	1.13	NA	1.09
Downtown C-3 zoned census tracts**	NA	NA	NA	1.08
Bay Area	1.10	1.10	1.08	1.08

\* Superdistrict 1 covers northeast San Francisco and is the smallest area information available from Census 2000

\*\* Includes Downtown C-3 zoned census tracts; this information is not available from Census 2000

\*\*\* ACS 2007-2011 estimates are subject to margins of error of around 0.02, therefore the difference since the 2000 Census may not be statistically significant.

Source: US Census, Decennial Census 2000 and American Community Survey 2007-2011.

**Table 19. Transit Impact Development Fee (TIDF) Collections**

Fiscal Year	Revenue
2010-11	\$1,048,050
2010-12	\$1,691,300
2012-13*	\$7,814,000
<b>TOTAL</b>	<b>\$10,553,350</b>

Source: Department of Building Inspection, May 2013.

## Privately-Owned Public Open Space (POPOS) and Public Art

Presuming that significant employment and office development growth would occur, the Downtown Plan requires new commercial development to support associated urban service improvements, including specific programs for open space and art.

### POPOS

Privately-owned public open spaces (POPOS) are publicly accessible spaces in forms of plazas, terraces, atriums, small parks, and even snippets that are provided and maintained by private developers. In San Francisco, POPOS are mostly in the Downtown office district. Prior to 1985, developers provided POPOS under three general circumstances: voluntarily, in exchange for a density bonus, or as a condition of approval. The Downtown Plan created the first requirements for developers to provide publicly accessible open space as a part of projects in C-3 Districts. The goal was to provide quality open space in sufficient quantity and variety to meet the needs of downtown workers, residents and visitors. Since then, project sponsors may provide POPOS instead of their required open spaces, and locate them in other districts such as Eastern Neighborhoods (Section 135 of the Planning Code).

### Public Art

The public art requirement created by the Downtown Plan is commonly known as the “1% for Art” program. Its purpose is to ensure that the public has access to a variety of high-quality art. This requirement, governed by Section 429 of the Planning Code, provides that construction of a new building or addition of 25,000 square feet or more within the downtown C-3 district triggers a requirement to provide public art that equals at least 1% of the total construction cost. After more than 25 years since the adoption of the Downtown Plan, development has created an extensive outdoor gallery that enriches the Downtown environment for workers and tourists alike.

### Development

With the slowdown in Downtown office development applications following the economic downturn, no new POPOS have been added to the existing 81 POPOS in the Downtown C-3 District since 2008 (Table 20). Four POPOS are located outside Downtown, bringing the existing total citywide to 85 POPOS. Downtown development has added 31 POPOS since 1985 and approximately 60% of the POPOS include public art. The public art requirement has produced 39 pieces of art related to 31 development projects. With the economic recovery gathering strength, more POPOS and public art will be added in the future.

**Table 20.**  
**Number of Privately-Owned Public Open Space (POPOS)**

POPOS	< 1985	1985-2012	Total
In C-3 District	50	31	81
with Art	2	21	23
Outside C-3 District	2	2	4
with Art	1	1	2
<b>TOTAL</b>	<b>52</b>	<b>33</b>	<b>85</b>

Source: SF Planning Department.

# Conclusion

The *Downtown Plan* directed that dense employment growth be concentrated in the C-3 district, generally along both sides of Market Street from the Embarcadero to Van Ness Avenue. In order to accommodate this growth, the Plan contains a series of goals, policies and targets designed to ensure that new development would pay its way and generate a net benefit for the City.

By most measures, the San Francisco *Downtown Plan* has been a success. It guided the creation of one of the most successful core areas of any American city. The vitality, job and housing density, retail activity and overall character of the downtown have improved dramatically. The Planning Department will continue to monitor these trends so that land use policy adjustments can be made as required to maintain and enhance a successful Downtown and Plan and avoid unintended consequences.

The housing and transportation goals are among the most important in the *Downtown Plan*. The Plan states that without sufficient and appropriate housing to serve new commercial development, local housing costs would increase, thereby compromising the vitality of downtown. The Plan also states that if employment growth increases the number of cars downtown, thereby significantly increasing traffic, the area's attractiveness and livability could be affected adversely. As a result, the Plan contains various targets relating to these policy issues.

Although private developers and the City have produced more housing than the Plan target, the cost of housing has increased substantially since the adoption of the Plan. This is partly the result of regional economic forces and job growth that have increased the attractiveness of San Francisco and the Bay Area. Some of this new housing has taken the form of downtown office conversions. This trend, along with the potential addition of thousands of new units of pipeline housing Downtown, will continue to increase the Downtown residential population and vitality of the district.

Since the Plan was adopted, growth in downtown office space has served to enhance the vitality of the area. But further analysis of transportation trends is needed. Available data suggests that transit use is high and stable or increasing for downtown workers and residents, that downtown residents may own cars but drive to work less and walk to work in large numbers, and that bike commuting is small now, but is increasing. The data also indicates that ridesharing has declined, but this could be due to an increase in the use of other forms of transportation, including an increase in the number of individuals working from home. These trends will be analyzed in the future when additional transportation information for San Francisco becomes available from the American Community Survey.

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## *Data Sources:*

Association of Bay Area Governments (ABAG)  
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Dun & Bradstreet  
San Francisco Controller's Office  
San Francisco Department of Building Inspection  
San Francisco Planning Department  
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NOTE: For additional information that is available on the Planning Department web site under the heading "Data and Analysis Reports," please see previous reports (annual, five-year, and 25-year) at: <http://www.sf-planning.org/index.aspx?page=1663>