Supervisor District 1

COMMUNITY NEEDS ASSESSMENT

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WELCOME
TRIPS, INC.
BINGO

EXECUTIVE SUMMARY

The Richmond District Strategy is a three-part analysis conducted in collaboration with Supervisor Mar's Office and San Francisco Planning. The goal of the Strategy is to create a vision for the future of District One that will help ensure a sustainable and high quality of life for current and future generations who live, work, and visit in District One.

The Richmond Community Needs Assessment is the second phase of the Richmond District Strategy. The first phase, *the Existing Conditions Analysis,* included a thorough analysis of the people and places of the Richmond. The second phase, *the Community Needs Assessment,* conducted an in-depth outreach process to people who live, work, and visit the Richmond and the results are summarized in this report. This phase provides a picture of the needs, issues and opportunities in the Richmond from the perspective of people who know it best.

The Community Needs Assessment Survey (the Survey) asked people to respond to questions about their needs and opinions on the following topics: housing, transportation and streetscapes, local commercial areas, parks and open space, and community facilities. Available in English, Chinese, and Russian, the survey was conducted from October 2015 to January 2016. A digital online version was circulated electronically to neighborhood contacts. It was also available in hard-copy and conducted in- person in outreach meetings, at events or to passers-by on the commercial corridors. The project team attended more than 20 events or meetings at schools, community organizations, and the farmers market. (See page 3 for a list of all outreach events) and Chinese-speaking staff attended events to reach out to monolingual Chinese residents in the neighborhood.

Over 1,400 responses to the survey were received. Of those, 84 percent were residents of District One, the majority of whom live in the central and eastern areas (See Map 2-1, page 6). Survey respondents represent an array of different races and ethnicities, income levels, and age groups. However, compared to the demographic breakdowns of residents in the Richmond from the U.S. Census, the survey overrepresents the white population, people with higher income (earning more than $150,000 annually), homeowners, families, and single-family home residents. Households earning between $45,000 and $150,000 annually, as well as seniors are well represented. (See pages 4 and 5). Throughout the report, survey results on different topics are presented in aggregate as well as by different subgroups. This breakdown helps highlight the views of these subgroups, especially the ones who were underrepresented in the survey (see survey results summary broken down by each subgroup on page ix).

SURVEY FINDINGS

Reasons for Living in the Richmond

Respondents living in the Richmond found close proximity to large open space, safety, affordability, and a family- oriented community as top reasons they chose to live in the Richmond.

Housing Characteristics

Of respondents who live in the Richmond, 53 percent reported that they rented (compared to census data that reports 64 percent of Richmond residents rent). As income decreased, the percent of renters increased among the respondents, with a significant majority of respondents earning less than $45,000 annually reporting as renters (page 9). Living alone or with roommates is also more common as income goes down (page 10).

Respondents were most likely to live in two to four-unit buildings, followed by single-family homes. Interestingly, living in single family homes was equally common across various income groups, even among respondents with annual income of less than $45,000.

Given that single family homes are one of the most expensive housing options in San Francisco, this information may indicate that lower income residents may have purchased their homes many years ago.

When asked about their housing space needs, the need for additional bedrooms was most common among renters: While only 5 percent of respondents live in what is termed an overcrowded home, defined as more than two persons per bedroom, 18 percent of respondents expressed interest in having an additional bedroom. Conversely, the desire to downsize was not apparent. Only 3 percent of respondents expressed an interest in downsizing, while 13 percent of respondents live in a home where there are more bedrooms than occupants.

Housing Need

More than 80 percent of respondents expressed that they do not believe Richmond has sufficient housing available. The most commonly stated housing need were for: housing for families and larger households and housing for households with income between $45,000 to $80,000. Renters and people of lower income expressed the need for these housing types at much higher rate than owners and people of higher income (page 16 and 17).

Development

Respondents were asked about their preference for types of housing development that they think is appropriate for the Richmond District. Respondents expressed their desire for four different options of development where more height and more units were combined with higher affordability rates. Of the respondents to this question, about 71 percent expressed desire for at least one type of housing development. The most preferred height was a four-story building, with 53 percent of respondents finding this height desirable and only 28 percent not wanting to see this type of project. While projects at higher heights were less desirable than four story projects among the respondents, taller projects at 6 or 8 stories were still found desirable by 38 and 28 percent of respondents, respectively (page 19). Interest in development varied significantly across different income groups and also based on whether respondents owned or rented their home. Overall, responses indicate that if the household income decreased, the interest in development is greater for development projects that offered higher heights and higher affordability levels. Similarly, renters were interested in development at higher heights and higher affordability levels: 51 percent of renters found 6 or 7 story projects with higher affordability rates desirable while only 24 percent of owners expressed desire for this development type.

Transportation & Streetscape Improvements

Respondents overwhelmingly reported (86 percent) that they walk to the local shops. It also appears that the majority of respondents have indicated that they are willing to walk an additional block or two in order to receive improved transit service. Even among seniors, a 60 percent majority also welcomed this idea.

Respondents have also identified certain intersections that they perceive as unsafe (see Map 5-1 on page 22). Most frequently mentioned intersections were those along Geary Blvd between 12th Avenue and 26th Avenue. The majority of respondents stated that they welcome pedestrian safety and streetscape improvements, with wider sidewalks as the most preferred improvement.

Commercial Character

The Inner Clement commercial corridor was reported as the most frequented commercial area in the Richmond followed by the Outer Geary commercial corridor. Interest in additional seating and sidewalk space was most common on Inner Clement, while concerns about sidewalk cleanliness were common in both commercial areas. Respondents who live in the Richmond visit shops in the neighborhood mostly for daily needs, restaurants, and bars, while majority of them leave the Richmond for entertainment services. Respondents who live outside the Richmond visit the Richmond most frequently for restaurants, bars and shops and least often for entertainment. Respondents were also asked to indicate businesses they found integral to the neighborhood. Green Apple Books was by far the most frequently nominated business, followed by Balboa Theater, and Toy Boat Dessert Café. A full list is shown in Map 6-3 on page 31.

Parks and Open Space

With one of the largest parks available in the City, Golden Gate Park was by far the most frequently visited park among the respondents, with respondents indicating they visited at least weekly. Walking was the most common mode of transportation to get to the Park (page 34). Respondents also ranked the safety of intersections along Fulton Street that they use as their point of entry to the Park. Overall, responses indicated an interest in improved pedestrian safety along Fulton Street at the north edge of the park. Maps 7-3 and 7-4 illustrate different perceptions of safety at these intersections. Respondents also indicated a significant need for additional sporting facilities – courts and fields- as well as swimming pools in the Richmond.

Community Facilities

Libraries were the most commonly used facilities among the respondents, along with the museums in Golden Gate Park. Community centers such as the Richmond Recreation Center, the YMCA, and the Richmond District Neighborhood Center were also frequently mentioned. The need for additional social service centers, community centers for shared use, facilities for children, and more senior services were also identified.

Senior Respondents

14% of respondents identified as seniors

49% identified as non-white

38% reported earning less than $45,000

39% live in a single family home

61% own their home

39% rent their home

27% live alone

66% live with family

60% would consider walking an additional block or two to ride faster and reliable transit

51% interested in 4-story housing projects w/ 20% affordability

Lower Income Respondents

Annual Income Less Than $45,000

17% of all respondents reported earning less than $45,000

55% identified as non-white

40% live with family

30% live with roommates

21% own their home

79% rent their home

83% of lower-income respondents cannot afford current sales prices of homes in the Richmond

72% of lower-income respondent cannot afford current rental rates in the Richmond

63% — 4-story project, 20% affordable

38% — 8 -story project, 30% affordable

HOUSING CONCERNS

- Living without roommates was the greatest housing need for this income group

- Additional senior housing and more housing for household with an annual income of $25k and $80k were the greatest housing concerns for this group

Asian Respondents

26% of respondents identified as Asian

60% earn an annual income of less than $90,000

58% own their home

42% rent their home

37% of Asian respondents live in a single-family home

HOUSEHOLD TYPE

74% live with family

9% live with roommates

12% live with alone

Renting Respondents

53% of all respondents identified as being renters

33% identified as non-white

51% reported having an annual income of less than $90,000

38% of renting respondents live in a single-family home

23% live with roommates

89% of renters cannot afford current sales prices of homes in the Richmond

61% of renters cannot afford current rental rates in the Richmond

HOUSING CONCERNS

- The need for additional bedrooms was the greatest concern for renters

- Additional housing for small households (1 to 2 person) and housing for households with an annual income of $25k and $80k were expressed as the greatest type of new housing development need

57% — 4-story project, 12% affordable

65% — 4-story project, 20% affordable

51% — 6 -story project, 30% affordable

37% — 8 -story project, 30% affordable

Note: the information on this page describes highlights of survey respondents. For additional details, please refer to the Community Needs Assessment

SUNRISE
WIRELESS
騰龍閣餐館
415-666-3515
TENGLONG CHINESE RESTAURANT
騰龍閣
415-666-3515
騰龍閣餐館
415-666-3515
208 Clement St.
Lunch Special Every Day
$7.95 and up
KISHA STUDIO
park life
INFORMATION BOOTH
Busvan for Bargains
PUBLIC PARKLET

1. INTRODUCTION

The Richmond District Strategy is a collaboration between Supervisor Eric Mar's Office and San Francisco Planning. The goal of the Strategy is to create a vision for the future of District One that will help ensure a sustainable and high quality of life for current and future generations who live, work, and visit in District One.

The Strategy is comprised of a three-part analysis that will provide a comprehensive understanding of the District's current trends, needs, and opportunities: an Existing Condition Report that describes the current trends and conditions in the District; the Community Needs Analysis that includes the perspectives of the people who live, work, and visit in the neighborhood; and a final phase that will identify opportunities and recommend solutions to help better shape the future of the neighborhood.

The following analysis details the results of the Community Needs Assessment, the second phase of the Richmond District Strategy. This Analysis identifies the trends, needs, and issues in the Richmond from the perspective of who knows it best.

COMMUNITY NEEDS ASSESSMENT SURVEY

Based on the findings of the Existing Conditions Report, completed in August 2015, the project team designed a Community Needs Assessment Survey with more than 30 questions on the following topics: Demographics, Housing, Transportation and Streetscape, Commercial Areas, Parks and Open Spaces, and Community Facilities. These topics generally align with those discussed in the Existing Conditions Analysis report.

SURVEY METHODOLOGY

The survey was conducted both in-person and by using SurveyMonkey, an online survey platform that was open to anyone in the community provided that they live, work, or visit the Richmond neighborhood.

Of the 1,413 completed surveys, 85 percent were administered online and 15 percent were administered as an intercept survey, or a survey that is conducted in-person, generally in a public setting (Figure 1-1).

Figure 1-1

TOTAL SURVEYS TAKEN

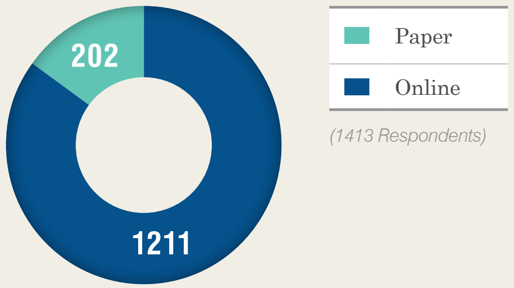


Figure 1-2

TOTAL NUMBER OF PAPER SURVEYS

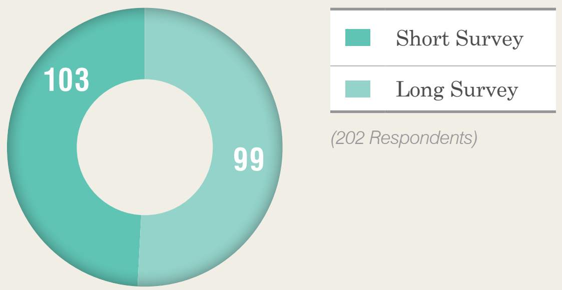
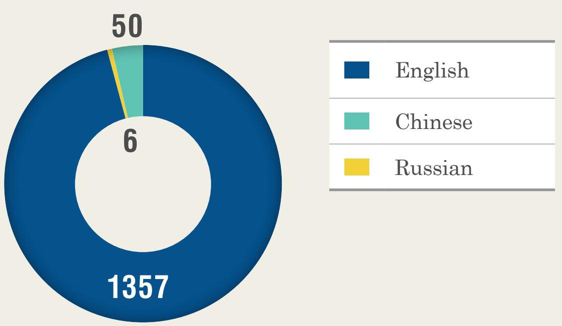


Figure 1-3

NUMBER OF SURVEYS TAKEN IN DIFFERENT LANGUAGES



A condensed version applying only eight questions from the original survey was administered on commercial streets, at the farmer's market and other major intersections in the Richmond. This short survey was a tool to capture people's input in two or three minutes. The data collected from the short surveys has been compiled with the other survey data and is a subset of the hard copies mentioned (Figure 1-2). The timeline on page 3 indicates the locations where the short surveys were taken.

MULTI-LINGUAL SURVEY FORMS

As found in the Existing Conditions Analysis (pg. 7), 16 percent of households in the Richmond are linguistically isolated, meaning all adult members of a household (age 14 years or older) have at least some difficulty speaking English.

In efforts to better reach these populations, the survey was translated into Chinese and Russian. Fifty surveys were taken in Chinese and six surveys were taken in Russian.

OUTREACH PROCESS

Staff kicked off an extensive public outreach process in September 2015 with Supervisor Mar at the Inner Clement Farmers Market, followed with e-mail announcements to various stakeholders, local media, residents, property owners and businesses on the San Francisco Planning's listservs. This survey was soon featured on blogs, newsletters, and high visibility locations in the neighborhood, including:

» Supervisor Mar's Newsletter

» Richmond Blog

» Planning Association of Richmond website

» Nextdoor for Richmond neighborhoods

» Flyers at libraries, local businesses, and neighborhood services

In addition, the project team attended many events in the neighborhood including weekly or monthly events at schools, neighborhood organizations and services, and churches. Chinese speaking staff on the project team was available to reach out to mono-lingual Chinese speaking residents, especially seniors by attending several weekly or monthly meetings at neighborhood centers.

Richmond senior center community outreach

Clement Street farmer's market community outreach

OUTREACH EVENTS

2015						2016
JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY

July

Argonne Elementary School
PTA Meeting (July 21)

September

Clement Street Farmers Market
(September 27)
4 short surveys taken

October

Tenant Town Hall Meeting
at Richmond Senior Center
(October 23)

November

PAR Board Meeting
(November 1)

Inner Clement Community Outreach
(November 10)
4 short surveys taken

Arguello Market Community
Outreach (November 11)
11 short surveys taken

Presidio Middle School PTSA
Meeting (November 12)

Tenant Town Hall Meeting
(November 12)

Asian Family Support Center
After School Meeting
(November 13)

January

Richmond Senior Center Community Outreach
(January 11)

Richmond District YMCA Foodbank Community
Outreach (January 13 and 20)

Outer Geary Community Outreach (January 13)
8 short surveys taken

Inner Balboa Community Outreach (January 14)
2 short surveys taken

Inner Clement Community Outreach (January 20)
6 short surveys taken

Richmond District YMCA Community Meeting
(January 21)

Alamo Elementary School Monthly PTA Meeting
(January 22)

Richmond District Neighborhood Center
Community Outreach (January 7, 14, 21, and 28)

Clement Street Farmers Market Community
Outreach (January 23, 2016)
24 short surveys taken

United Methodist Church Community Outreach
(January 23, 2016)

Golden Gate Senior Center Community Outreach
(January 28, 2016)
44 short surveys taken

Richmond District Neighborhood Center (RDNC) community outreach

2. SURVEY DEMOGRAPHICS

RACE AND ETHNICITY

The current demographics in the Richmond are 48 percent white, 42 percent Asian, 2 percent African American, and 7 percent two or more races and Other. In comparison, the survey respondents totaled 63 percent white, 26 percent Asian, and the remaining 11 percent African American, Hispanic, Latino or Spanish origin, two or more races, and Other. Therefore the survey overrepresents the white population and underrepresents the Asian, African American, Latino and other races living in the neighborhood.

INCOME

While only 20 percent of Richmond residents report annual incomes exceeding $150,000, 34 percent of the survey respondents fall into this category. This indicated an overrepresentation of households in this income category in the survey. This was also followed by an underrepresentation of households with income less than $45,000. While 32 percent of households report an annual income of $45,000 or less, only 17 percent of survey respondents qualify as such. Households with annual earnings between $45,000 and $150,000 were fairly represented in the survey, when compared to the percentage of all Richmond residents in this income category, as seen in Figure 2-2 and 2-3.

Breaking down race and ethnicity based on income indicates different trends (Figure 2-4). About one-third of Asian respondents have an annual household income of less than $45,000 and 20 percent report more than $150,000. This trend is reversed among the white respondents: over 40 percent of white respondents' households report more than $150,000 annually, and only 13 percent report less than $45,000.

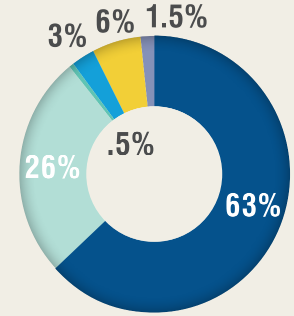
SENIORS

Similar to the age trends of Richmond residents, the considerable majority of the respondents were among ages 18 to 65. About 14 percent of respondents identify as seniors (over 65), which is closely representative of the percentage of seniors who live in Richmond (15 percent).

Senior respondents identified higher as non-white compared to respondents overall, with 42 percent identifying as Asian. The household income of senior respondents is predominately low income (less than $45,000) and less likely to exceed $150,000, in contrary to the overall income breakdown of all respondents. This aligns with the race

Figure 2-1

ETHNIC BACKGROUND OF SURVEY RESPONDENTS

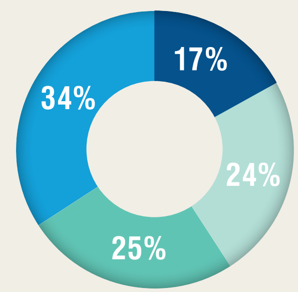


- White
- Asian
- Black
- Hispanic, Latino, or Spanish Origin
- Two or more races
- Other

(1,355 Respondents)

Figure 2-2

HOUSEHOLD INCOME OF SURVEY RESPONDENTS

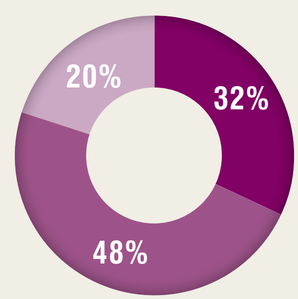


- < $45,000
- $45,000–$90,000
- $90,000–$150,000
- > $150,000

(1,332 Respondents)

Figure 2-3

ACTUAL HOUSEHOLD INCOME



- < $45,000
- $45,000–$150,000
- > $150,000

Source: American Community Survey (ACS) 2008–2012 (5-year estimate)

Figure 2-4

HOUSEHOLD INCOME BY ETHNIC BACKGROUND OF SURVEY RESPONDENTS

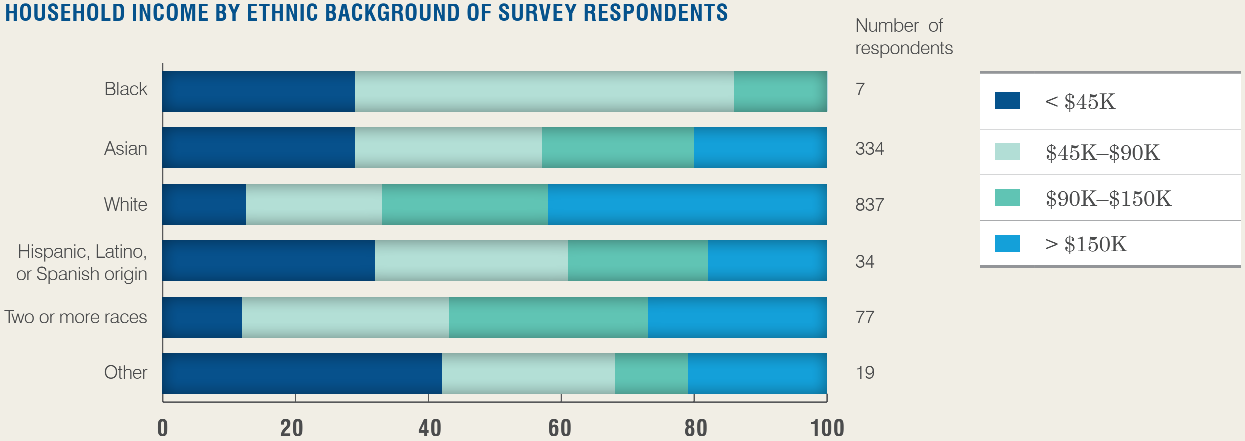
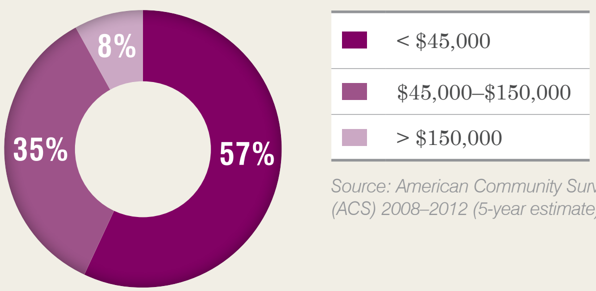


Figure 2-5

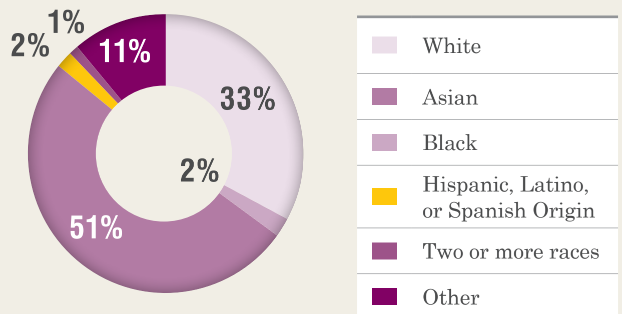
ACTUAL SENIOR HOUSEHOLD INCOME



Source: American Community Survey (ACS) 2008–2012 (5-year estimate)

Figure 2-6

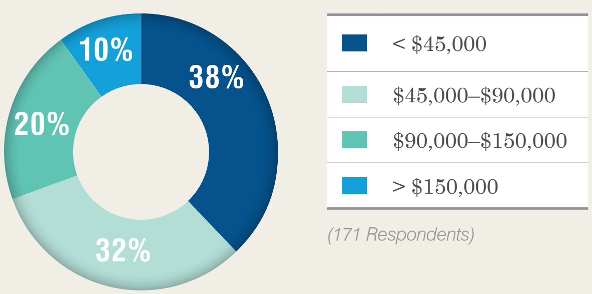
ACTUAL SENIOR ETHNIC BACKGROUND



Source: American Community Survey (ACS) 2008–2012 (5-year estimate)

Figure 2-5a

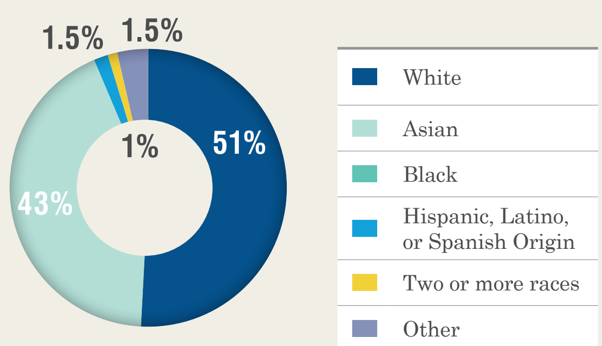
SENIOR SURVEY RESPONDENTS' HOUSEHOLD INCOME



(171 Respondents)

Figure 2-6a

SENIOR SURVEY RESPONDENTS' ETHNIC BACKGROUND



(188 Respondents)

and income of all seniors in the Richmond as well, while the survey underrepresents non-white seniors and lower income seniors as shown in Figure 2-5, 2-5a, 2-6, and 2-6a.

CONNECTIONS TO THE RICHMOND

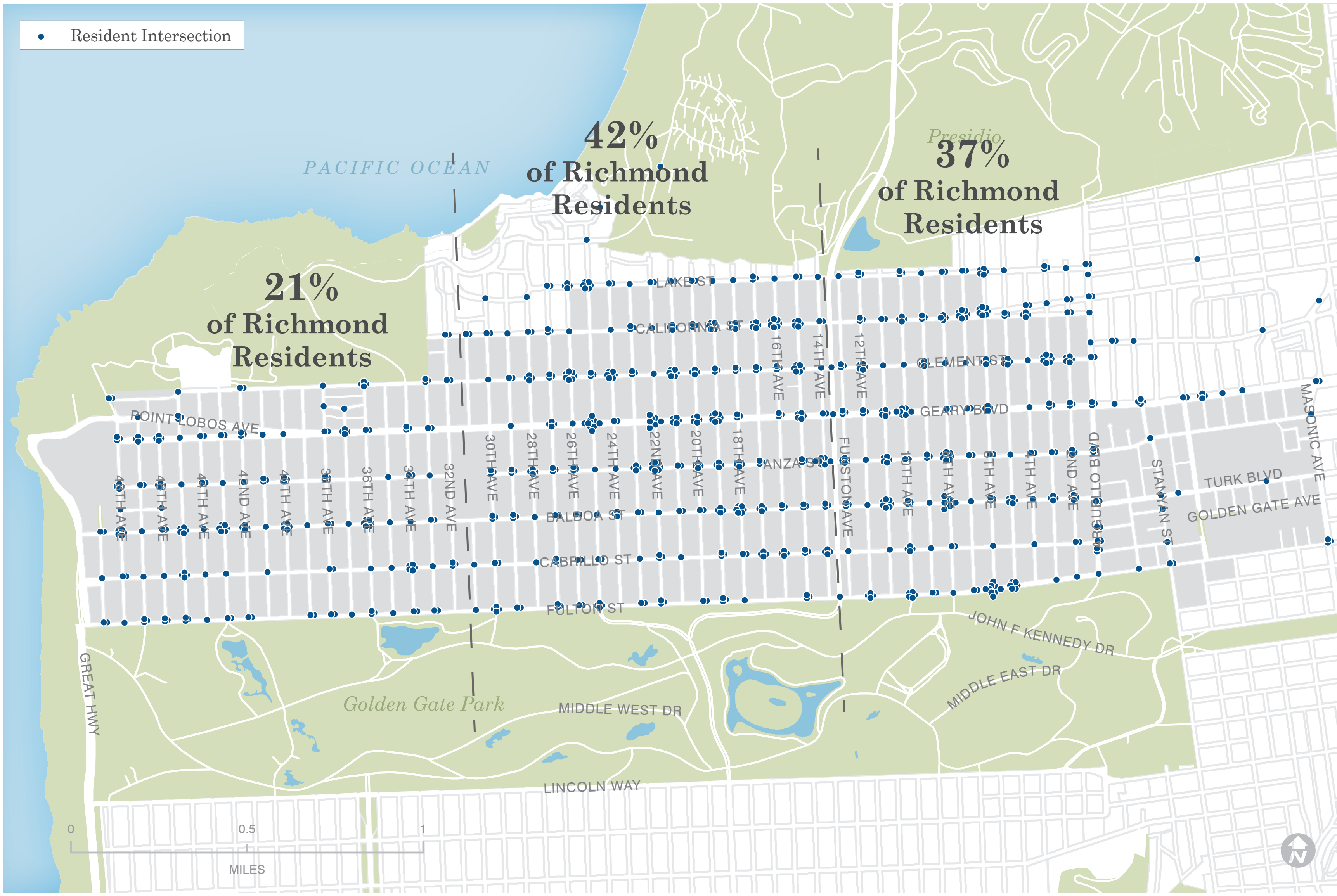
Approximately 84 percent of total respondents live in the District and 16 percent live outside of the District (Supervisorial District 1 boundary)[1] and either work in the Richmond and/or visit (Figure 2-7). Those who live in the Richmond were asked to identify why they chose to live in the neighborhood. Among the options provided, most respondents found the close proximity to large open space, safety, affordability, and family-oriented community as the top reasons. A write-in category was offered, which many used to indicate factors not already provided. Some common reasons cited were the variety of food and shops, adequate public transportation access to the downtown area, while many were long term residents of the neighborhoods indicating that their families have lived in the Richmond for multiple generations.

As seen in Map 2-1, the majority of respondents live in the central and eastern areas of the District. Of the 893 Richmond residents who provided the intersection

1 49 respondents skipped the question.

Map 2-1

CLOSEST INTERSECTIONS TO SURVEY RESPONDENTS' RESIDENCE



Source: SF Planning

closest to their home, about 37 percent live east of Park Presidio Boulevard, 42 percent live between 14th and 31st Avenues, and 21 percent live west of 32nd Avenue.

Respondents who did not live in the Richmond District were asked whether they would consider moving to the Richmond. Amongst the 190 respondents, about 55 percent indicated they would consider moving. The top reasons indicated are: variety of food and shops, open space and parks, and the perspective that the Richmond is a safe place to live. The respondents who would not consider moving to the Richmond indicated that the District is expensive and lacks affordability. Another common reason stressed lack of easy access to the neighborhood from their place of work.

3. HOUSING CHARACTERISTICS

BUILDING TYPE

Two to four unit buildings were most prevalent amongst survey respondents, with 40 percent indicating that they reside in those buildings. Another 38 percent of respondents indicated that they reside in a single family home. However, only 28 percent of buildings in the District are single family homes, indicating an overrepresentation of those living in single family homes. Among the respondents who do not live in the Richmond, 40 percent live in single family homes.

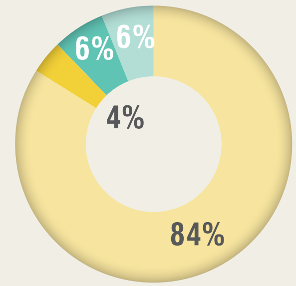
It is interesting to note that single family homes were almost equally identified across all income levels. While household respondents with more than $150,000 annual income had the highest proportion of single-family occupants (39 percent), respondents of households with annual incomes less than $45,000 were almost equally likely to live in single family homes as well (35 percent) (Figure 3-2). Given that single family homes are currently the most expensive type of building in the Richmond, this indicates that households of lower incomes have been living in these homes for a considerable amount of time and are most likely already or nearly paid for.

TENURE

Currently districtwide, 36 percent of residents are homeowners and 64 percent are renters. However, 47 percent of respondents identified as homeowners and 53 percent as renters, indicating an overrepresentation of homeowners and underrepresentation of renters, as shown in Figure 3-3 and 3-4. In addition, 68 percent

Figure 2-7

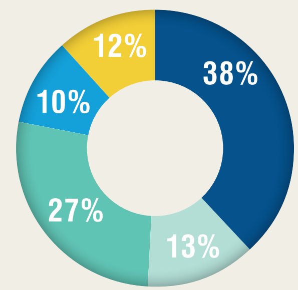
CONNECTIONS TO THE RICHMOND OF SURVEY RESPONDENTS



	Live	84%
	Work	4%
	Visit	6%
	Other	6%

Figure 3-1

WHAT TYPE OF HOUSING DO YOU LIVE IN? (OF RICHMOND RESIDENTS)



	Single-family home
	Duplex
	Apartment in small building (2–4 units)
	Apartment in medium building (5–6 units)
	Apartment in medium building (> 6 units)

(1,181 Respondents)

BUILDING TYPE	% OF RESPONDENTS
Single-family home	38%
Housing with 2–4 units	40%
Housing with 5 units or more	22%

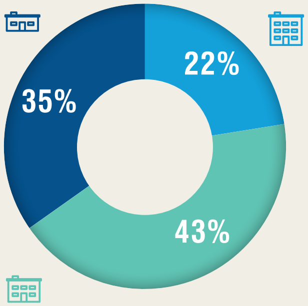
2012 UNIT MIX	DISTRICT 1
Single-family home	28%
2 units	20%
3-4 units	24%
5-9 units	13%
10+ units	15%

Source: US Census Bureau

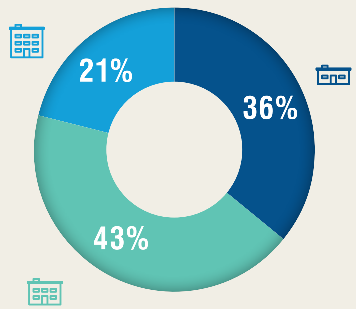
Figure 3-2

BUILDING TYPE FOR SURVEY RESPONDENTS WHO LIVE IN THE RICHMOND (BY INCOME GROUP)

HOUSING TYPE – LESS THAN $45K
(187 RESPONDENTS)

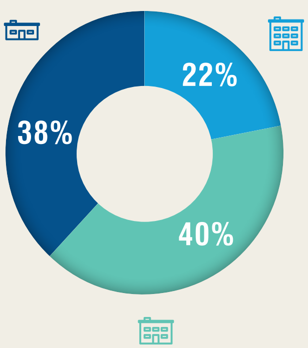


HOUSING TYPE – BETWEEN $45K–$90K
(268 RESPONDENTS)

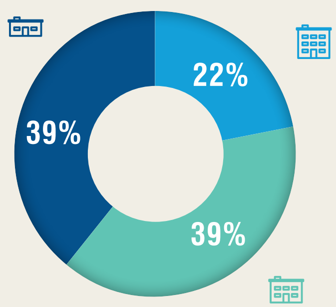


Single-family home
Housing with 2–4 units
Housing with > 5 units

HOUSING TYPE – BETWEEN $90K–$150K
(292 RESPONDENTS)



HOUSING TYPE – MORE THAN $150K
(389 RESPONDENTS)



	SINGLE-FAMILY HOME	*2–4 UNITS*	*>5 UNITS*
< $45K	35%	43%	22%
$45K–$90K	36%	43%	21%
$90K–$150K	38%	40%	22%
> $150K	39%	39%	22%

of renting respondents live in a rent control unit, while only fifty percent of residential units in the Richmond are rent controlled.

Almost 60 percent of senior respondents, who live in the Richmond, own their home. This trend was even more pronounced among respondents who live outside the Richmond (Figure 3-5).

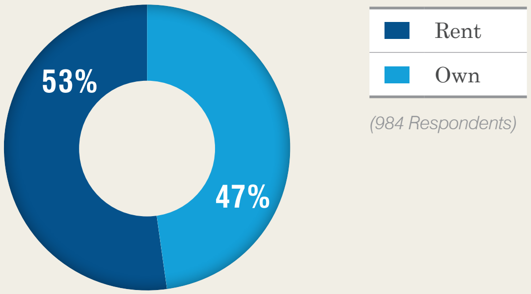
When looking at different income groups, a majority of respondents (68 percent) earning $150,000 annually or more own their home. The percent of renters increases as incomes decrease, and 78 percent of the respondents earning less than $45,000 identify as renters.

HOUSEHOLD TYPE

A majority of respondents stated that they live with their family (72 percent). This response is an overrepresentation of Richmond residents, where the percentage of family households is 50 percent. Living alone or with roommates are the next most common household types, each comprising about 13 percent of respondents. Household types varied significantly among income groups as described in Table 3-1. Generally as income goes up among respondents, it is more likely that they live in a family household: while 90 percent of respondents with annual incomes of than $150,000 or

Figure 3-3

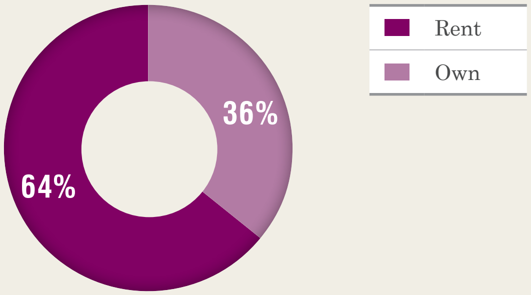
TENURE OF SURVEY RESPONDENTS WHO LIVE IN THE RICHMOND



(984 Respondents)

Figure 3-4

TENURE OF ALL RICHMOND RESIDENTS



Source: US Census Bureau

Figure 3-5

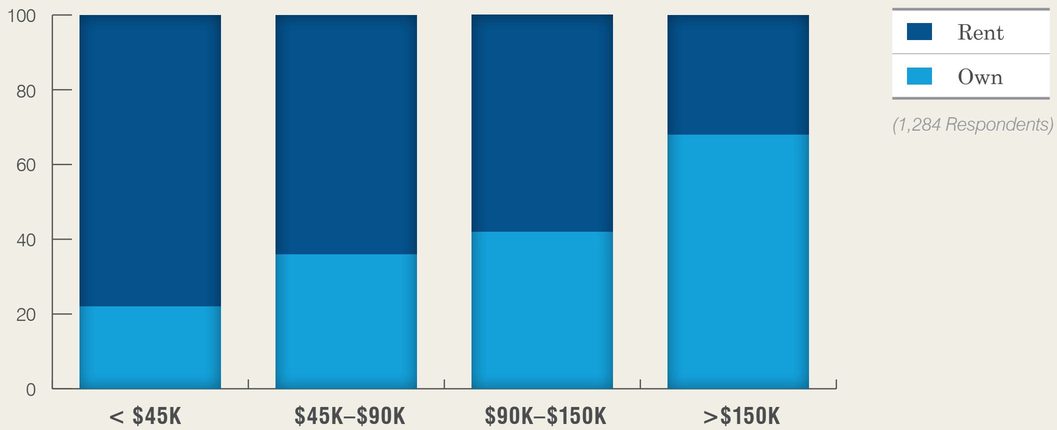
TENURE OF SENIOR RESPONDENTS (65 YEARS OR OLDER)

AGE	DO YOU LIVE IN THE RICHMOND?	OWN	RENT
65 or more	Yes	58%	42%
	No	70%	30%

Figure 3-6

TENURE OF SURVEY RESPONDENTS WHO LIVE IN THE RICHMOND (BY INCOME GROUP)

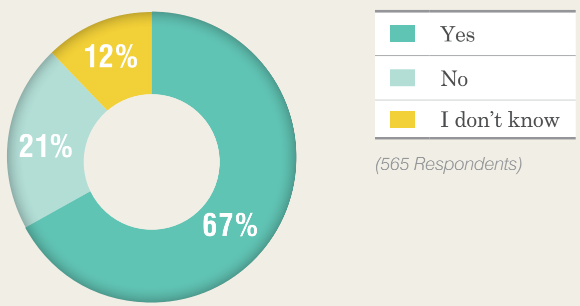
HOUSEHOLD INCOME	OWN	RENT
< $45K	22%	78%
$45K–$90K	36%	64%
$90K–$150K	42%	58%
> $150K	68%	32%



(1,284 Respondents)

Figure 3-7

IF YOU RENT, DO YOU HAVE RENT-CONTROL?



(565 Respondents)

more live in family households, only 40 percent with annual incomes of $45,000 or less do so. Living alone or with roommates is more common as respondents' income goes down, with 25 percent of respondents making less than $45,000 living alone and 30 percent living with roommates (Table 3-1).

HOUSEHOLD SIZE

The average household size among all respondents was 2.7 people, which is slightly higher than the average household size of all households in the Richmond (2.4 people). As shown in Table 3-3, household size is highest amongst those report an annual income of $150,000 or more.

Senior respondents had a higher rate of living at home alone (26 percent) compared to the overall rate among respondents (13 percent).

Asian respondents are more likely to live in a larger household (38 percent live in households with 4 or more people) compared to white respondents (24 percent live in households with 4 or more people) as shown in Table 3-2.

BEDROOM MIX

Thirty-five percent of respondents live in two-bedroom units and 44 percent of

Table 3-1

HOUSEHOLD INCOME AND HOUSEHOLD TYPE OF SURVEY RESPONDENTS

	COMBINATION OF FAMILY AND ROOMMATES	FAMILY	I LIVE ALONE	ROOMMATES
< $45K	4%	40%	25%	30%
$45K–$90K	2%	54%	23%	22%
$90K–$150K	0%	78%	13%	8%
> $150K	2%	92%	2%	4%

Figure 3-8

DISTRIBUTION OF HOUSEHOLD SIZE OF SURVEY RESPONDENTS

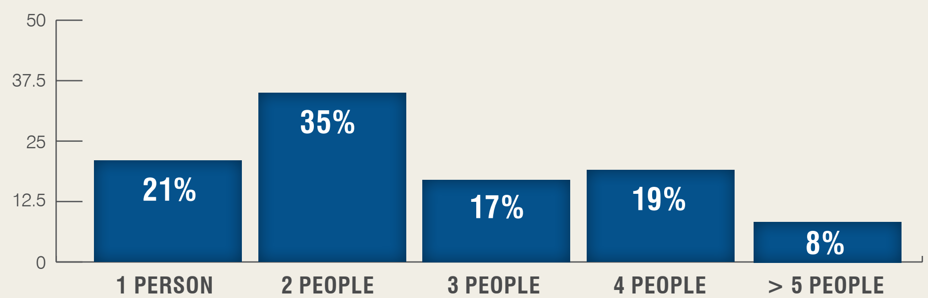


Table 3-2

HOUSEHOLD SIZE BY ETHNIC BACKGROUND OF SURVEY RESPONDENTS

	1 PERSON	2 PEOPLE	3 PEOPLE	> 4 PEOPLE
Asian	21%	27%	14%	38%
White	21%	38%	17%	24%

Table 3-3

AVERAGE HOUSEHOLD SIZE BY INCOME OF SURVEY RESPONDENTS

	AVERAGE HOUSEHOLD SIZE
< $45K	2.5
$45K–$90K	2.3
$90K–$150K	2.7
> $150K	3.2

Table 3-4

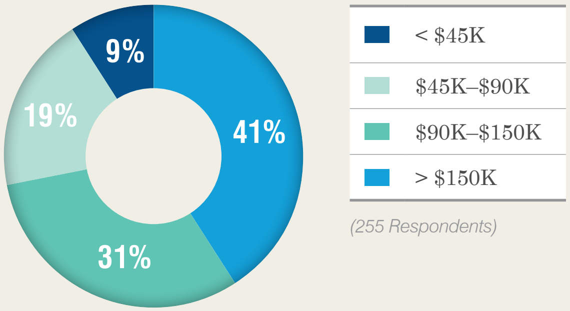
BEDROOM MIX TRENDS

	STUDIO	1 BEDROOM	2 BEDROOMS	3+ BEDROOMS
District 1	6%	26%	39%	29%
Richmond Survey Respondents	4%	17%	35%	44%

Source: US Census Bureau

Figure 3-9

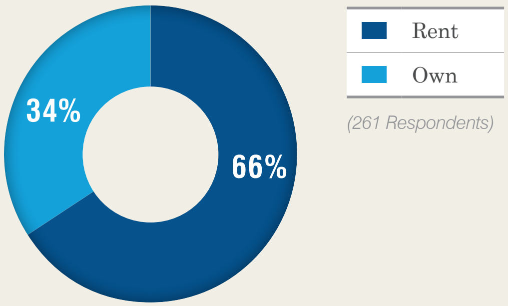
I NEED MORE BEDROOMS



(255 Respondents)

Figure 3-9a

I NEED MORE BEDROOMS (RENTERS VS. OWNERS)



(261 Respondents)

respondents live in units with three or more bedrooms. This corresponds with the findings in the Existing Conditions Report (pg. 23), which indicate 60 percent of buildings in the Richmond District were two or three bedroom units (Table 3-4).

Analyzing the size of households in correlation with number of bedrooms indicate that about 5 percent of respondents live in overcrowded homes, where more than two person live in each bedroom. Conversely, 13 percent of respondents live in homes where there are more bedrooms than occupants, which can be perceived as over-housing.

CURRENT HOUSEHOLD HOUSING SPACE NEEDS

Overcrowding is a measure that could indicate need for additional bedrooms while overhousing could indicate an interest in downsizing. To evaluate the housing space needs further, the survey also asked questions regarding respondents need for additional bedrooms, more space, or a desire to downsize. Respondents' needs varied based on income, age and housing tenure. Respondents who own their home were less likely to express any housing needs compared with renters.

The need for additional bedrooms was the most common need among all respondents: about 18 percent who expressed any housing needs indicated the need for more bedrooms. The need for additional bedrooms was significantly more common among renters (66 percent), and respondents with an annual household income of $90,000 or more (72 percent), as seen in Figure 3-9 and 3-9a.

Only 10 percent of overall respondents (145) expressed a need for larger space without additional bedrooms. Of those 145 respondents, renters (61 percent) and households with annual incomes $90,000 or more (64 percent) comprised the majority.

Overall, 104 of the respondents who expressed that they want to live without roommates. Of those 104 respondents, renters (90 percent) and households earning $90,000 or less (69 percent) made up the majority, as shown in Figure 3-10.

Of all respondents who stated that they live with roommates or a combination of family and roommates, only about 45 percent expressed the need to live without roommates. This finding indicates an interesting trend as it is often assumed that people live in roommate settings because they cannot find housing that is affordable or suitable for their needs on their own. A total of 79 respondents with annual incomes of $90,000 or more live with roommates and only 18 of those respondents indicated that they wanted to live without roommates. This finding may indicate that individuals, especially those that earn $90,000 or more voluntarily live with roommates for reasons other than financial.

Only 45 respondents, a majority of whom were owners, expressed an interest in downsizing. These respondents were primarily in households earning $90,000 or less, as shown in Figure 3-10.

About one third of respondents wrote a comment in the “other” category of the survey. The comments included: housing affordability (both rent and housing prices), affordable family housing in order to allow or continue having family in the District, as well as interest in affordable homeownership.

Lastly, over a third of respondents (37 percent) indicated that they did not need additional bedrooms, space, or have a desire to downsize. About 63 percent were homeowners and over half of these homeowners had an annual income of $150,000 or more. However amongst renters, this income trend was dissimilar, where half of renting respondents had an income of over $90,000 and vice versa.

HOUSING AFFORDABILITY

In general, most respondents did not consider Richmond District housing rents or sales prices affordable. When asked about their perception of housing affordability in the Richmond, overall, proportionally more renters expressed being unable to afford the current rental rates compared to owners. Similarly for sales prices, a significant majority of renters (90 percent) considered the prices unaffordable while 50 percent of homeowners expressed the same concern, as seen in Figure 3-12.

Over 42 percent of respondents indicated that they cannot find housing suitable to their needs in the Richmond.

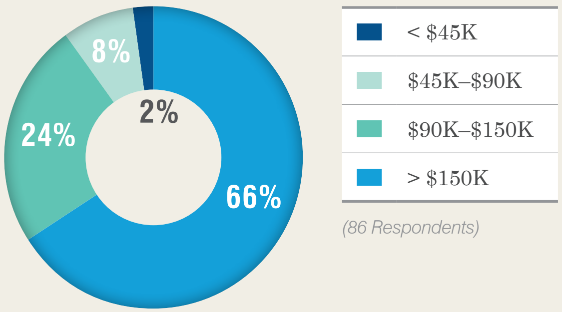
Although 60 percent of senior respondents are homeowners, seniors also had similar concerns of current housing affordability in the Richmond. Both senior homeowners and renters found current rental rates and sales prices unaffordable.

Many respondents emphasized that if their residence was not under rent control, or that if they had not purchased their home 10 or more years ago, they could not afford the current market prices. Some renters, even those under rent control, expressed fear of drastic increases in rent or eviction.

Figure 3-10

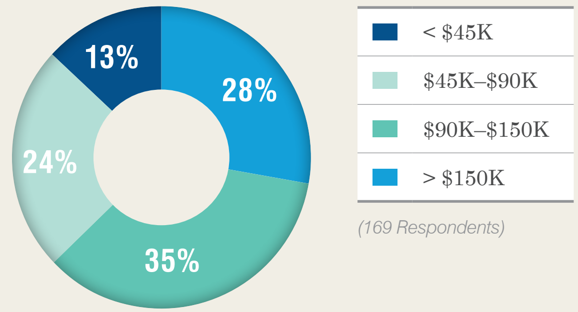
SURVEY RESPONDENTS' HOUSING SPACE NEEDS (BY INCOME GROUP)

I NEED MORE BEDROOMS – OWNERS



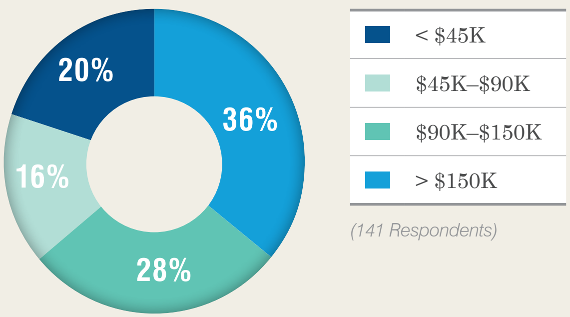
(86 Respondents)

I NEED MORE BEDROOMS – RENTERS



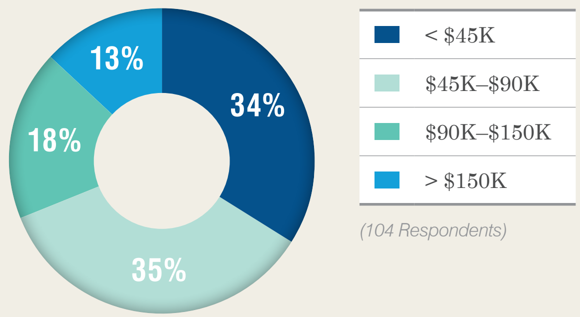
(169 Respondents)

I NEED LARGER SPACE BUT NO ADDITIONAL BEDROOMS BY HOUSEHOLD INCOME



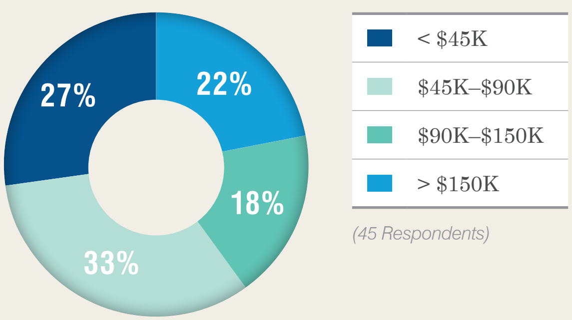
(141 Respondents)

I WANT TO LIVE WITHOUT ROOMMATES BY HOUSEHOLD INCOME



(104 Respondents)

I WANT TO DOWNSIZE BY HOUSEHOLD INCOME



(45 Respondents)

"I would not be able to buy on current salary, I fear moving because I cannot find anywhere affordable in my neighborhood or in SF at large."

"I am glad we bought in the Richmond in 1976; otherwise, it would be hard to get into the market."

Figure 3-11

SURVEY RESPONDENTS' PERCEPTIONS ON HOUSING AFFORDABILITY

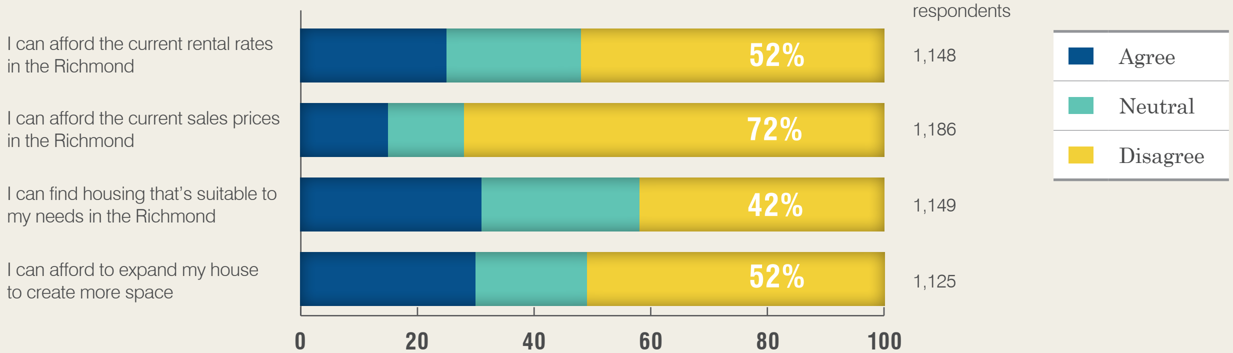
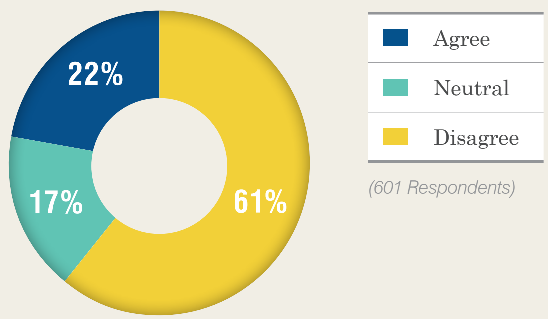


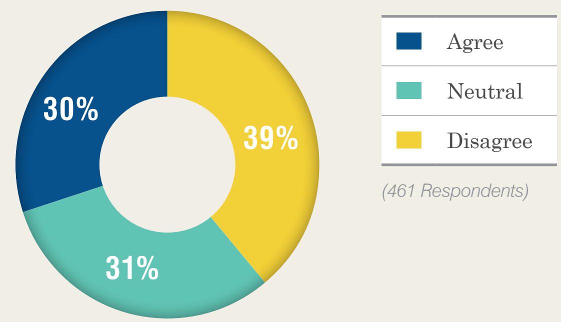
Figure 3-12

PERCEPTIONS ON HOUSING AFFORDABILITY (BY RESPONDENT TENURE)

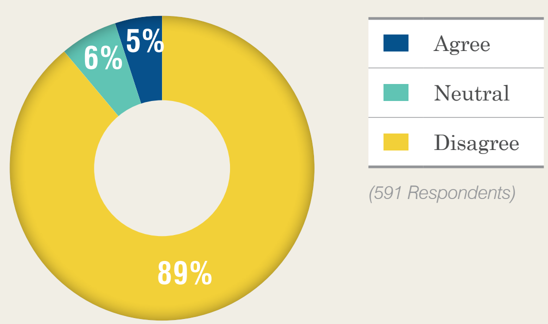
RENTER – "I CAN AFFORD THE CURRENT RENTAL RATES IN THE RICHMOND"



OWNER – "I CAN AFFORD THE CURRENT RENTAL RATES IN THE RICHMOND"



RENTER – "I CAN AFFORD THE CURRENT SALES RATES IN THE RICHMOND"



OWNER – "I CAN AFFORD THE CURRENT SALES RATES IN THE RICHMOND"

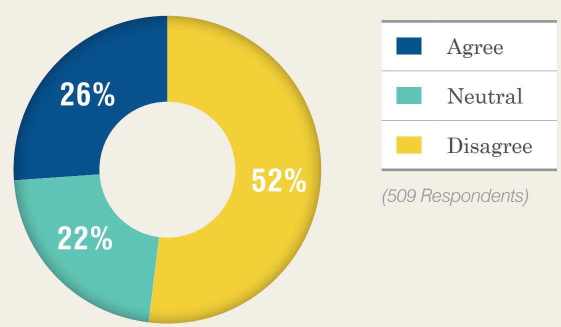
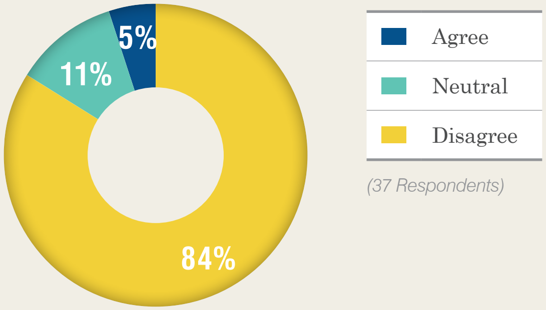


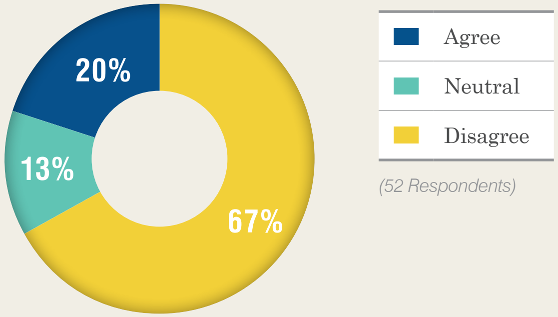
Figure 3-12a

SENIOR SURVEY RESPONDENTS' PERCEPTIONS ON HOUSING AFFORDABILITY

SENIOR RENTER – "I CAN AFFORD CURRENT SALES PRICES IN THE RICHMOND"



SENIOR OWNER – "I CAN AFFORD CURRENT SALES PRICES IN THE RICHMOND"



"I am lucky I moved here before the latest spike in rents I could not afford to come in now."

"We can afford what we have now, but only barely, and without rent control we're vulnerable to another displacement, and we can't afford to buy anything."

"... As I get older, living with 4 other people is becoming less and less desirable, but it's impossible to live on your own (or even really with fewer people) in this neighborhood. I think of this as a family oriented neighborhood, but I don't know how a young family could afford to live here and raise children! Just seems way too expensive..."

"We can't save because of how high rents are. Worried about no savings for child's college and our retirement."

4. HOUSING DEVELOPMENT

ADDING UNITS TO AN EXISTING BUILDING

About 20 percent of respondents who own their home expressed an interest in adding one or more residential units to their home (Figure 4-1). Another 28 percent of these respondents indicated that they may consider this option, depending on the costs. As income increases among homeowner respondents, interest in adding units to their residence does as well.

NEED FOR NEW HOUSING

Survey respondents have clearly indicated a strong need for housing in the Richmond, with 57 percent having indicated that housing supply is insufficient in the Richmond and another 25 percent remained neutral to this question (Figure 4-2). A higher proportion of renter or lower income respondents expressed needs for all types of housing compared to owners, or those of higher income (Figure 4-2a and 4-2b).

The largest majority of respondents (65 percent) indicated that more housing for families with children and multi-generational families is needed compared to any other type of housing (Figure 4-3). Similarly, a large majority of respondents

Figure 4-1

IF YOU OWN YOUR HOME, WOULD YOU CONSIDER ADDING ONE OR MORE RESIDENTIAL UNITS IF PERMITTED?

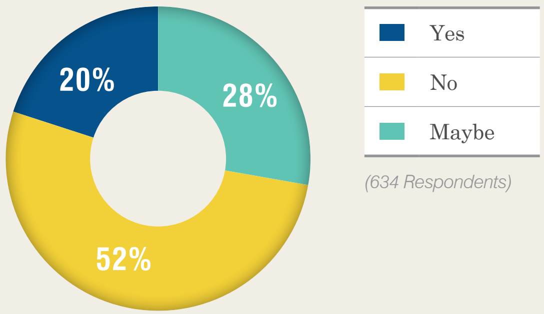


Figure 4-2

SURVEY RESPONDENTS' PERCEPTION ON NEED FOR HOUSING – "THE RICHMOND HAS SUFFICIENT HOUSING OPTIONS ALREADY."

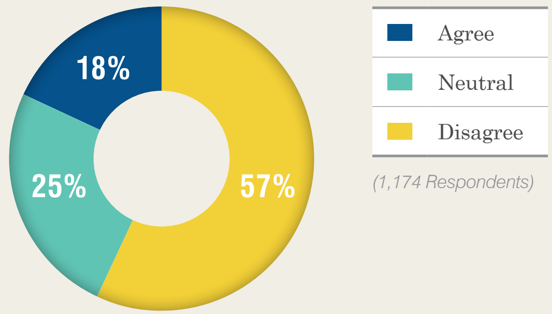


Figure 4-2a

THE RICHMOND HAS SUFFICIENT HOUSING OPTIONS ALREADY (RENTER VS OWNER) BY RESPONDENT TENURE

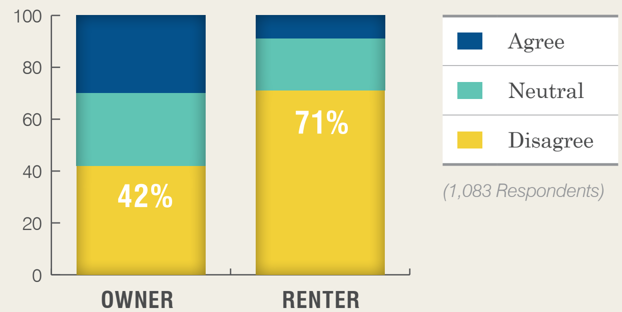


Figure 4-2b

THE RICHMOND HAS SUFFICIENT HOUSING OPTIONS ALREADY BY RESPONDENT INCOME

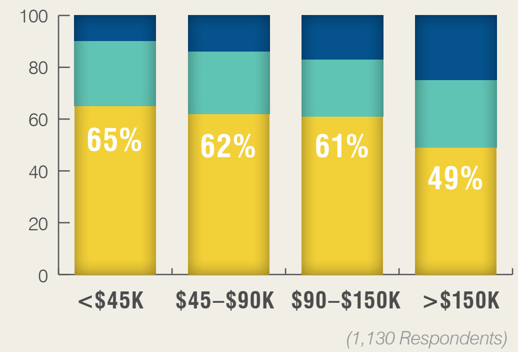


Figure 4-3

SURVEY RESPONDENTS' INTEREST FOR NEW HOUSING DEVELOPMENT

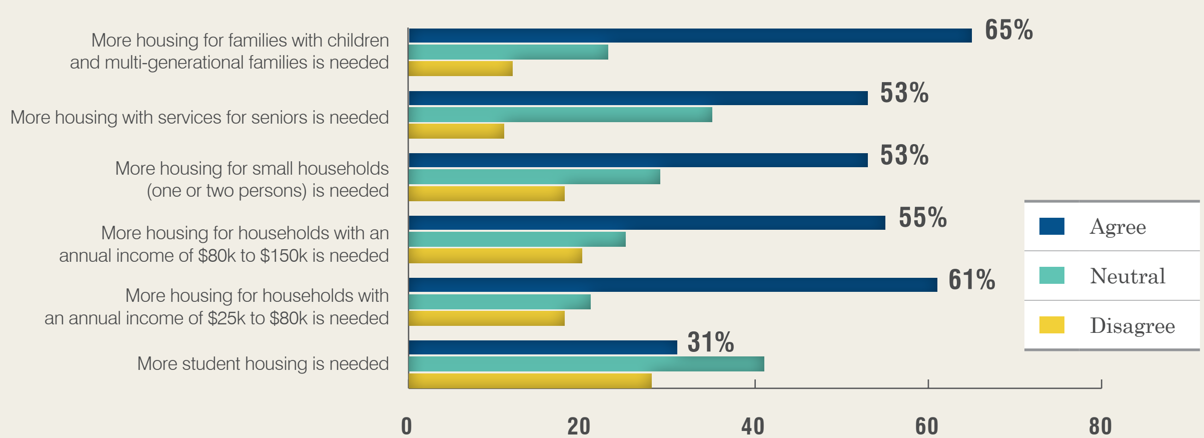


Figure 4-3a

MORE HOUSING FOR HOUSEHOLDS WITH AN ANNUAL INCOME OF $80K TO $150K IS NEEDED

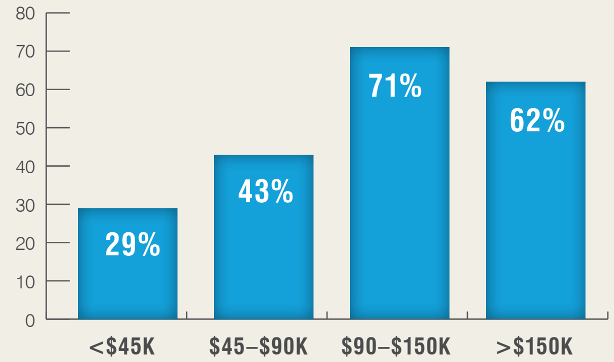


Figure 4-3b

MORE HOUSING FOR HOUSEHOLDS WITH AN ANNUAL INCOME OF $25K TO $80K IS NEEDED (RENTERS ONLY)

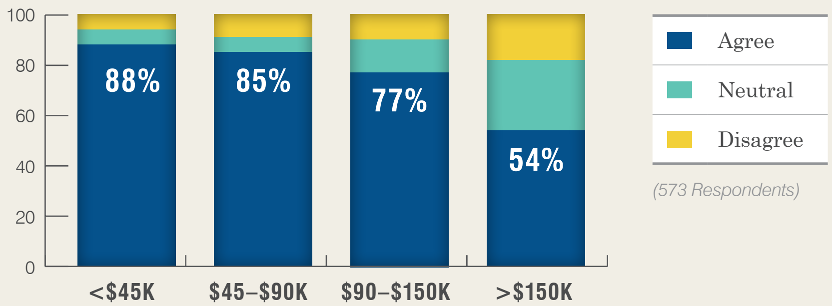
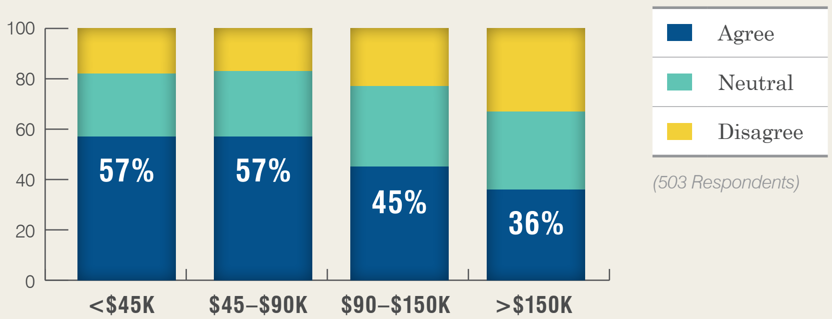


Figure 4-3c

MORE HOUSING FOR HOUSEHOLDS WITH AN ANNUAL INCOME OF $25K TO $80K IS NEEDED (OWNERS ONLY)



(61 percent) indicated a need for more housing for households with an annual income of $25,000 to $80,000 followed by housing for households with an annual income of $80,000 to $150,000. Respondents income level directly corresponded with their expressed need for levels of affordability to be served in new housing. For example, as seen in Figure 4-3a, only 29 percent of households earning less than $45,000 agreed that housing is needed for households earning $80,000 to $150,000 annually. However, respondents earning more than $90,000 annually expressed a need for this type of housing at a much higher rate.

As shown in Figures 4-3b and 4-3c, interest in additional housing for households with an annual income among $25,000 and $80,000 also varied between housing tenure as wells as income. Renters generally agreed at higher rates than owners, and respondents of lower income expressed this need more than those who earn more than $150,000. This indicates that as income levels go up, interest in housing at this affordability level decreases.

Overall, seniors overwhelmingly expressed need for senior housing (70 percent),with renting seniors (79 percent) showing at a higher rate than owners (50 percent). However, this needs were also expressed by among non-seniors, specifically by renting respondents of lower income. About 70 percent of renters earning less than $45,000 annually indicated that more housing with services for seniors is needed.

The need for student housing was not expressed as strongly amongst respondents, despite the University of San Francisco being located within the Richmond. Renters earning less than $45,000 annually were most likely to agree that more student housing is needed. Although the expressed need for this housing is lower than other trends described, these results do not necessarily indicate an opposition, with 41 percent of respondents remaining neutral, as shown in Table 4-3d.

About 7 percent of respondents (104) provided feedback in the write in section, in regards to housing needs. Among these 104 respondents, about 30 placed emphasis on preserving the neighborhood as low density and "quiet", while another 39 respondents emphasized a need for more housing with a diverse mix of housing types. Among those interested in more housing, some expressed concerns in the need for better transit and/or parking.

HOUSING DEVELOPMENT TYPE

Respondents were asked to comment on affordability requirements and the desire for taller buildings if it meant additional affordable units. The results further confirmed that the majority of respondents perceive a need for more housing in the Richmond. Overall, 71 percent of respondents to this question found development at one of the height and affordability options desirable. As seen in Figure 4-4, four-story development projects were desired by the majority of respondents (55 percent) and another 19 percent of respondents were neutral. Taller buildings (6 or more stories) were still considered desirable among about 40 percent of respondents.

Interest in development heights and affordability levels varied significantly across different income levels. As shown in Figures 4-4a and 4-4b, lower income respondents as well as renters found development at all height more desirable at a significantly higher rate than those who earn $150,000 or more, or those who were homeowners. In particular, renters were almost twice as likely as homeowners to desire developments with more height (6 or 7-story or 8-story projects). Overall, as respondents income decreases, interest in development at higher heights and higher affordability levels increases.

Respondents were also asked which corridors would provide the best locations for new development. Amongst the different

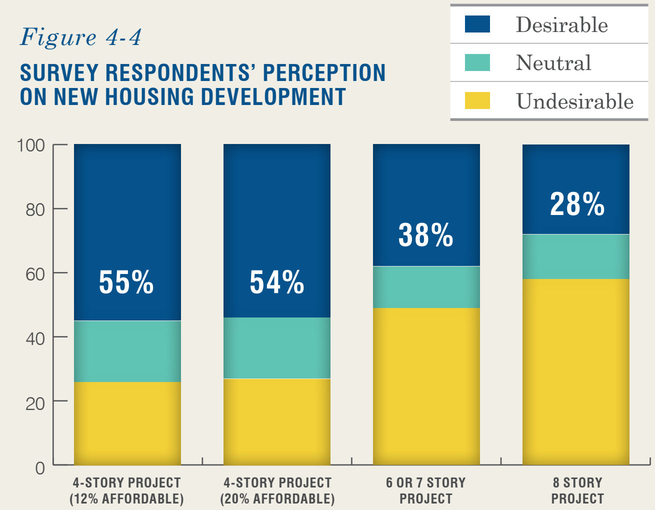
Figure 4-3d

SURVEY RESPONDENTS' PERCEPTION ON NEED FOR STUDENT HOUSING

MORE STUDENT HOUSING IS NEEDED	*% OF RESPONDENTS*
Agree	31%
Neutral	41%
Disagree	28%

Figure 4-4

SURVEY RESPONDENTS' PERCEPTION ON NEW HOUSING DEVELOPMENT



"Increasing number of units with the current mix of uses would be a good idea, but only as long as we had MAJOR mass transit infrastructure changes first."

"More housing of all types is needed. We need more options/density."

"STABLE housing for middle-, moderate- and low-income residents is needed to preserve and promote a diverse and rewarding neighborhood."

Figure 4-4a

SURVEY RESPONDENTS' DESIRABILITY OF BUILDING HEIGHT BY INCOME GROUP

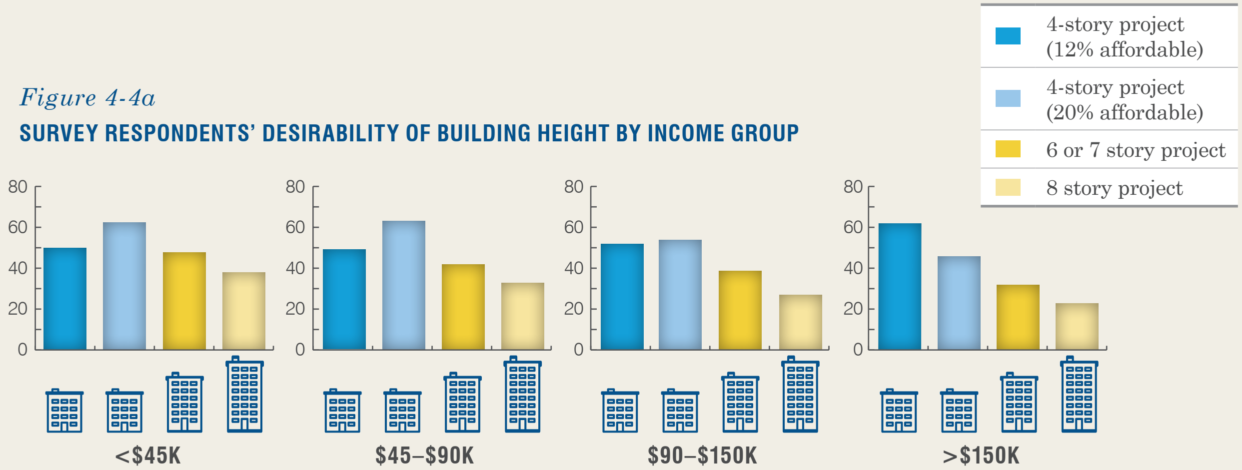
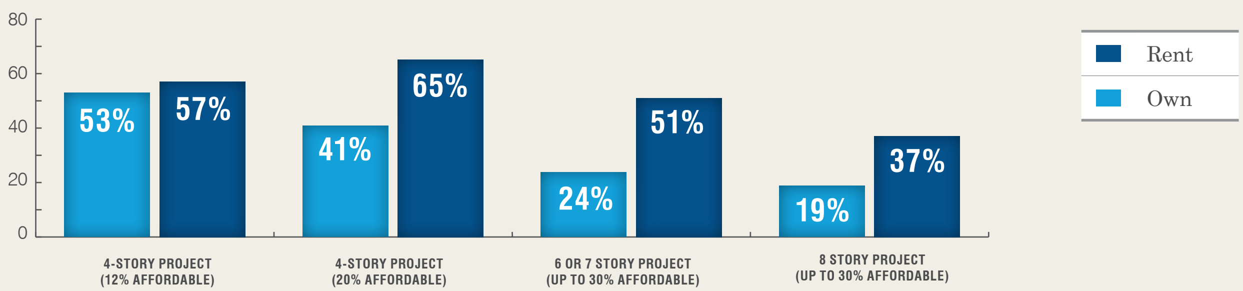


Figure 4-4b

SURVEY RESPONDENTS' DESIRABILITY OF BUILDING HEIGHT BY TENURE



STATEMENTS ABOUT NEW HOUSING DEVELOPMENT ON MAJOR CORRIDORS	*DESIRABLE*	*UNDESIRABLE*	*NEUTRAL*
4-story projects with 11 to 18 units with 12% of units being affordable to low income households	55%	26%	19%
For this type of housing, respondents were interested in this type of development along the east-west corridors in Richmond, especially along Geary Blvd, Fulton St and Balboa St			
4-story projects with up to 20% of units being affordable to low income households	54%	27%	19%
For this type of housing, respondents were interested in building these along the east-west corridors in Richmond, especially along Geary Blvd, Clement St, California St and Fulton St			
6 or 7-story projects with more units and up to 30% of units being affordable to low and middle income households	38%	49%	13%
For this type of housing, respondents were interested in type of development mostly along Geary Blvd. Some also expressed interest on Fulton St, Clement St and California St			
8-story projects with more units and more than 30% of units being affordable to low and middle income households	28%	59%	13%
For this type of housing, respondents were interested in type of development mostly along Geary Blvd and some on Fulton St.			

types of housing projects, Geary Boulevard and Fulton Street were the most common throughways identified. Respondents also considered Balboa, Clement, and California Streets as appropriate, mostly for four story developments.

"We need affordable housing built in the Richmond BADLY for residents being displaced by eviction and buyouts. It is being built everywhere else in SF, why not here??"

"We need to redevelop full blocks - too much wasted space, inefficient buildings, and confined use. Redevelop with dense mixed use & no height limit."

"We should allow for reasonable development. Old buildings that can be renovated by new developers can be good if balanced by height limits of neighbors."

"Unfortunately the whole City is overcrowded, but one thing I've always liked out here is the relatively low density."

"If new housing is introduced, the roads MUST be kept in better condition to handle increased traffic."

5. TRANSPORTATION & STREETSCAPE IMPROVEMENTS

Respondents overwhelmingly reported that they arrived by foot (86 percent), when asked how they get to shops in their neighborhood commercial district.[2] Arriving by public transit and driving were the next most common modes with at 61 percent, followed by biking (28 percent), and cab or rideshare at 16 percent (Figure 5-1).

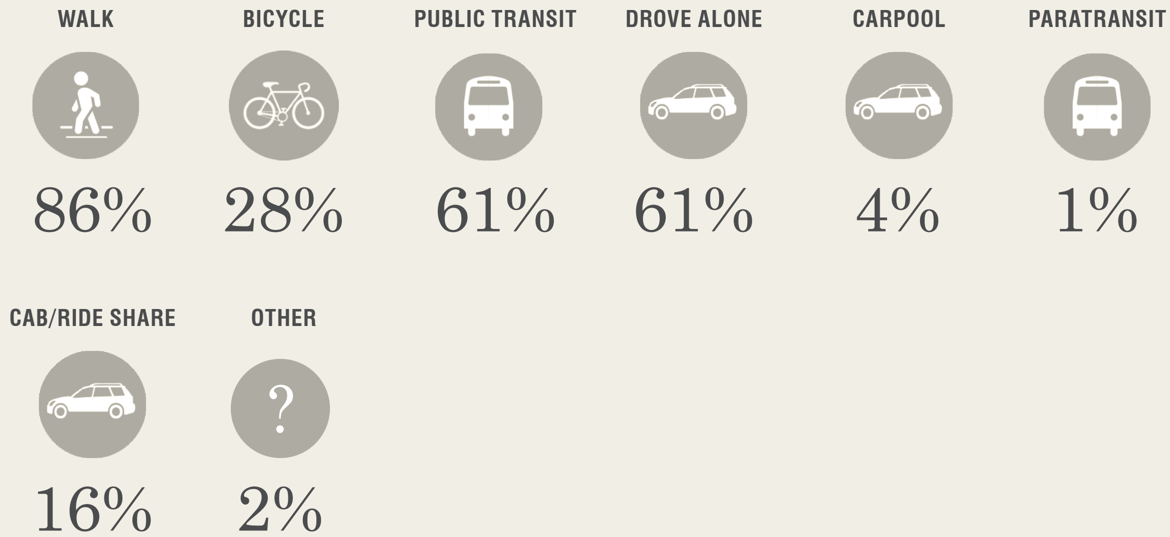
TRANSIT IMPROVEMENTS

One suggestion to improve transit reliability and shorten travel time is to reduce the number of bus stops. This means that transit riders would possibly need to walk an additional block or two to catch the bus or reach their destination. When asked if they would walk an additional block or two to improve transit speed, an overwhelming majority of respondents said yes (84 percent) (Figure 5-2). Although at a lower rate, about 60 percent of senior respondents also welcomed the idea (Figure 5-2a).

2 The sum of responses does not equate to 100 percent because respondents were allowed to choose more than one answer.

Figure 5-1

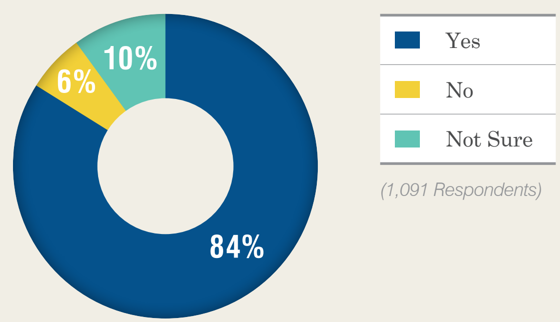
HOW DO YOU GET TO THE SHOPS IN THE RICHMOND?*



*The sum of responses do not equate to 100% because respondents were allowed to choose more than one answer.

Figure 5-2

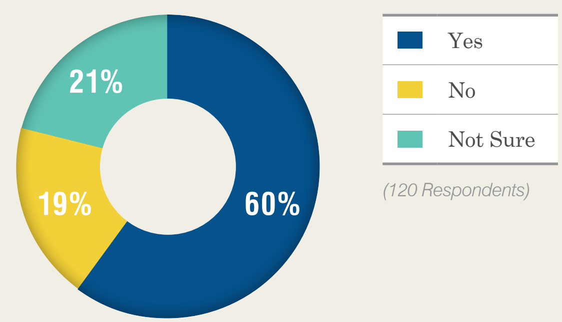
WOULD YOU WALK AN ADDITIONAL BLOCK OR TWO TO REACH A BUS STOP IF IT MEANT THAT YOUR RIDE WOULD BE FASTER AND BUS ARRIVAL TIMES MORE RELIABLE?



(1,091 Respondents)

Figure 5-2a

WOULD YOU WALK AN ADDITIONAL BLOCK OR TWO TO REACH A BUS STOP IF IT MEANT THAT YOUR RIDE WOULD BE FASTER AND BUS ARRIVAL TIMES MORE RELIABLE? (SENIOR RESPONDENTS)



(120 Respondents)

TOP UNSAFE STREETS/INTERSECTIONS BETWEEN TRANSPORTATION MODES

WALKING

INTERSECTION	*STREET/CORRIDOR*
22nd Ave & Geary Blvd	Geary Blvd
Geary Blvd & Park Presidio Blvd	Fulton St
7th Ave & California St	Park Presidio Blvd

BIKING

INTERSECTION	*STREET/CORRIDOR*
Park Presidio Blvd & Fulton St	Geary Blvd
15th Ave & California St	Fulton St
8th Ave & Fulton St	Clement St

DRIVING

INTERSECTION	*STREET/CORRIDOR*
15th Ave & California St	Geary Blvd
25th Ave & Geary Blvd	Fulton St
2nd Ave & Balboa St	Clement St

TAKING TRANSIT

INTERSECTION	*STREET/CORRIDOR*
Geary Blvd & Park Presidio Blvd	Geary Blvd
Arguello Blvd & Geary Blvd	Fulton St
25th Ave & Geary Blvd	Park Presidio Blvd

Geary Blvd & 22nd Ave

Geary Blvd & Park Presidio Blvd

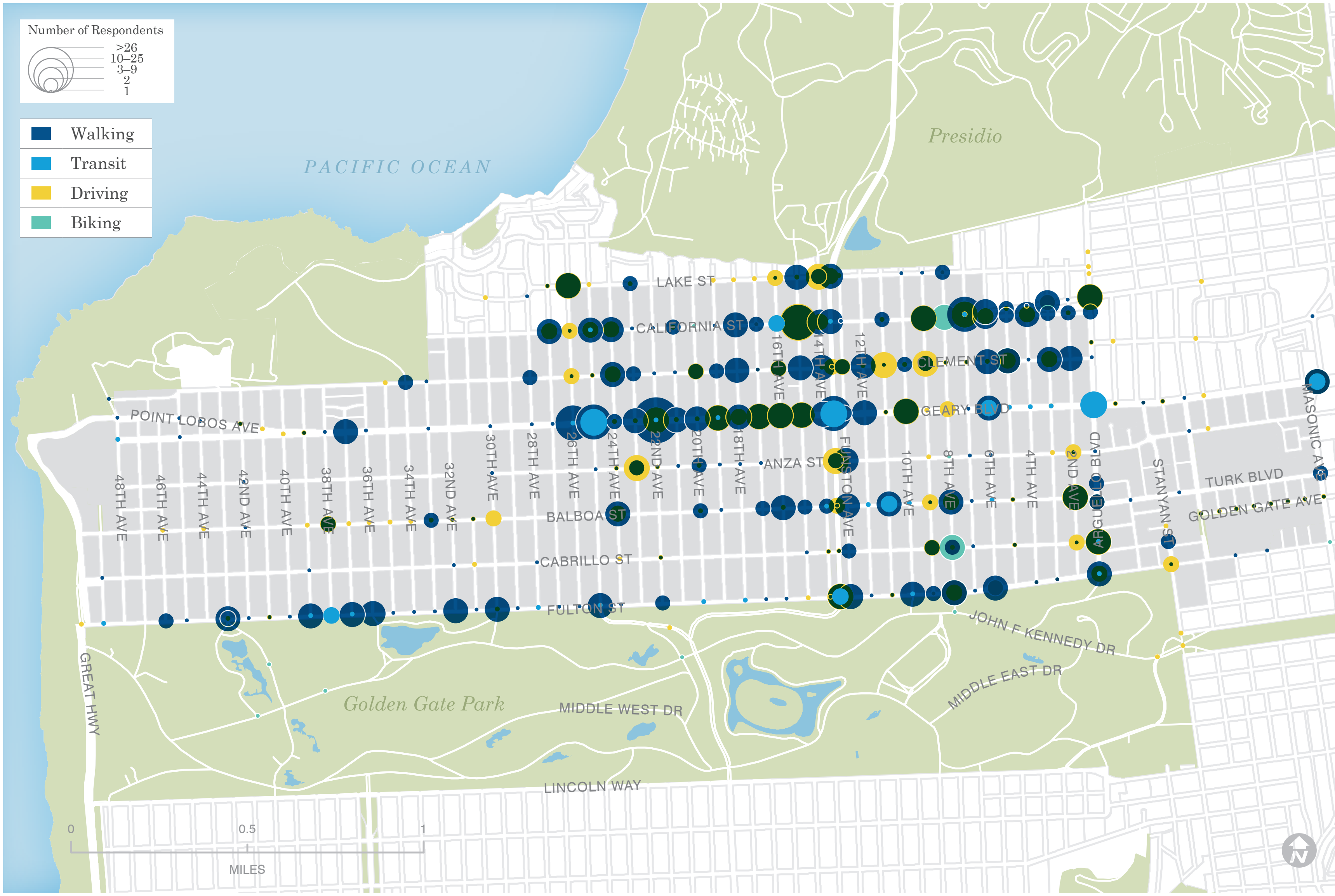
California St & 7th Ave

Geary Blvd & 25th Ave

Arguello Blvd & Geary Blvd

Map 5-1

SURVEY RESPONDENTS' PERCEIVED UNSAFE STREETS AND INTERSECTIONS (BY DOMINANT TRANSPORTATION MODE OF THE RESPONDENT TO THE LOCAL SHOPS)



Source: SF Planning

TRANSPORTATION SAFETY

Respondents were asked to indicate streets or intersections they consider unsafe when walking, biking, driving, or taking transit. Intersections along Geary Boulevard and Fulton Street were by far the most often mentioned. Map 5-1 illustrates all streets and intersections mentioned and the intersections with the most respondents are indicated on the map.

Geary Boulevard was identified as the most unsafe (18 percent). The Existing Condition Analysis has also identified Geary as a pedestrian high injury corridor. Fulton Street was also listed as unsafe in all four modes of transportation among respondents (14 percent). Similar to Geary, the Report also includes Fulton among the top five streets with the most bicycle and pedestrian collisions between 2005 through 2011.

Among the intersections respondents listed as unsafe for biking, two intersections, 8th Avenue & Fulton Street and Park Presidio Boulevard & Fulton Street were identified as intersections with vehicle and bicycle collisions, as detailed in Map 6-3 of the Report. Both Arguello Boulevard and Geary Boulevard and 25th Avenue and Geary Boulevard were intersections identified with fatal injuries for pedestrians as shown in Map 6-4 of the Existing Conditions Analysis. Twenty-fifth Avenue and Geary was also mentioned as an unsafe intersection when driving.

Respondents were also able to recommend improvements, as shown in the following:

Walking

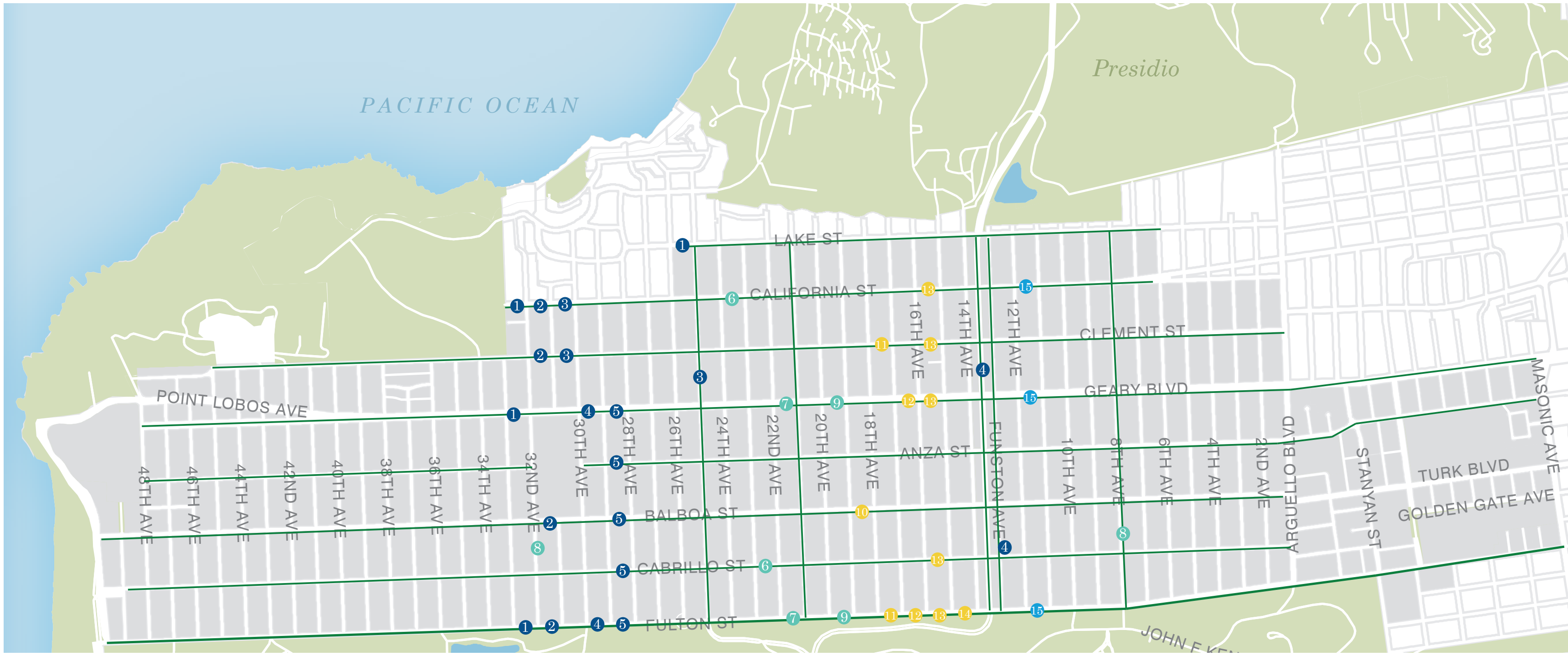
- More traffic lights along Geary Blvd, Fulton St, California St, Lake St
- More stop signs along Clement St, California St, Balboa St, Fulton St
    - More enforcement for speeding and those who do not abide the law (ie, red light and stop sign runners, speeders, people who stop in the middle of the crosswalk) Balboa, Cabrillo, Anza St, Geary Blvd and Fulton St
    - Pedestrian activated flashing lights and more marked crosswalks along Fulton St
- Wider sidewalks needed along Clement St, Geary Blvd and 25th Ave
- More visibility at intersections and better lighting at Fulton St, Geary Blvd, Park Presidio Blvd, Funston Ave

Biking

- Install more traffic lights and/or stop signs
    - Stop signs along Cabrillo St and California St
    - More stop lights along Geary and Fulton St
- More bike infrastructure (mostly bike lanes)
    - More visible sharrows along 8th Ave, especially since it leads into Golden Gate Park
    - More bike lanes or sharrows along north and southbound avenues

Map 5-2

RECOMMENDED IMPROVEMENTS BY TRANSPORTATION MODE



Recommended Walking Improvements

1. More traffic signals along Geary Blvd, Fulton St, California St, and Lake St
2. More stop signs along Clement St, California St, Balboa St, and Fulton St
3. Wider sidewalks are needed along Clement St, Geary Blvd, and 25th Ave
4. Better visibility and lighting at intersections along Fulton St, Geary Blvd and Park Presidio Blvd, and Funston Ave
5. More enforcement for speeding along Balboa St, Cabrillo St, Anza St, Geary Blvd, and Fulton St

Recommended Biking Improvements

6. More stop signs along Cabrillo St and California St
7. More stop lights along Geary Blvd and Fulton St
8. Additional visible bike sharrows along 8th Ave and more bike infrastructure along north and southbound avenues
9. More enforcement on Geary Blvd and Fulton St

Recommended Driving Improvements

10. Install more stop signs along Balboa St
11. More traffic signals along Clement St and Fulton St
12. Reduce traffic speeds and more enforcement along Geary Blvd and Fulton St
13. More enforcement of double-parked vehicles at intersections along California St, Cabrillo St, Fulton St, Geary Blvd,and Clement St
14. More dedicated left turn lanes along Fulton St that lead into Golden Gate Park

Recommended Transit Improvements

15. More enforcement of double-parked vehicles on transit corridors
16. Improve transit frequency and reliability

- More police enforcement on Geary and Fulton to address speeding

Driving

- Install more traffic lights and/or stop signs
    - *Stop signs:* Balboa (anywhere that currently does not have a 4-way stop),
    - *Traffic lights:* Clement (needs more management/balance between pedestrians and vehicles), Fulton St
- Reduce traffic speeds/more enforcement
    - Geary and Fulton
- More visibility at intersections and better lighting
    - Visibility at intersections on California, Cabrillo, Fulton St. Geary Blvd and Clement St is problematic because of the double parked cars and trucks obstructing driver's line of sight.
- More dedicated turn lanes
- Left turn dedicated lane on Fulton St that leads into GGP

Transit

- More enforcement of double parked vehicles because it slows down transit.
- Improve transit's frequency and reliability

PEDESTRIAN SAFETY AND STREETSCAPE IMPROVEMENTS

Respondents were asked to rate their interest in three types of pedestrian safety and streetscape improvements:

- **Intersection Safety Improvements**: wider sidewalks at intersections to shorten the crosswalk and provide room for furniture (bus shelter, art, etc.)
- **Sidewalk improvement**: widened sidewalk to provide more space for pedestrians, landscaping, and seating.
- **Parklet:** converting car space to small plaza with seating and landscaping next to sidewalk space

A majority of respondents, regardless of the mode of transportation they chose to get to their local shops, wanted to see intersection safety improvements, sidewalk improvements, and more parklets. All three types of improvements received support from the majority of respondents, with sidewalk improvements receiving the most support at 68 percent.

Respondents who chose biking as at least one of their modes of transportation to shops are more likely to find any of the three types of improvements highly desirable. Respondents who chose driving as one of their modes of transportation to shops were generally more likely to find any of the three types of improvements undesirable while the majority of them still found these improvements desirable.

IMPROVEMENT TYPE	DESIRABLE	UNDESIRABLE	NEUTRAL
Intersection Safety Improvement	57%	23%	20%
Sidewalk Improvement	68%	16%	16%
Parklet	55%	29%	16%

DESIRABILITY OF INTERSECTION SAFETY IMPROVEMENTS

(by dominant transportation mode to local shops)

DESIRABLE

BICYCLE
68%
(326 Respondents)

PUBLIC TRANSIT
60%
(326 Respondents)

UNDESIRABLE

BICYCLE
16%
(326 Respondents)

DRIVE
26%
(700 Respondents)

DESIRABILITY OF PARKLETS

(by dominant transportation mode to local shops)

DESIRABLE

BICYCLE
72%
(326 Respondents)

UNDESIRABLE

BICYCLE
16%
(326 Respondents)

DRIVE
32%
(704 Respondents)

DESIRABILITY OF SIDEWALK IMPROVEMENTS

(by dominant transportation mode to local shops)

DESIRABLE

WALK
71%
(970 Respondents)

BICYCLE
76%
(326 Respondents)

CAB/RIDE SHARE
73%
(181 Respondents)

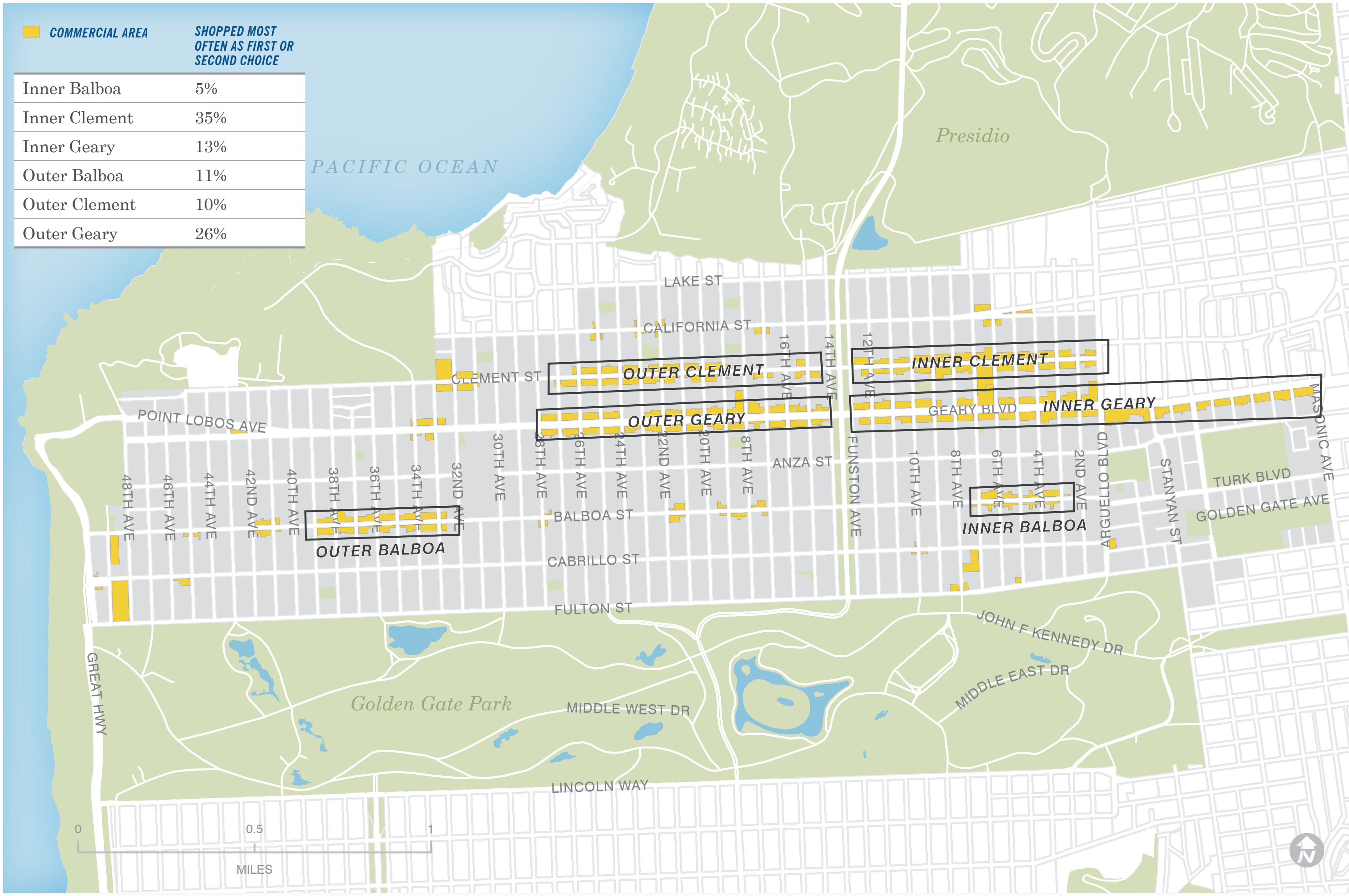
UNDESIRABLE

BICYCLE
11%
(326 Respondents)

DRIVE
19%
(699 Respondents)

Map 6-1

SURVEY RESPONDENTS' TOP FREQUENTED COMMERCIAL AREAS IN THE RICHMOND



COMMERCIAL AREA	SHOPPED MOST OFTEN AS FIRST OR SECOND CHOICE
Inner Balboa	5%
Inner Clement	35%
Inner Geary	13%
Outer Balboa	11%
Outer Clement	10%
Outer Geary	26%

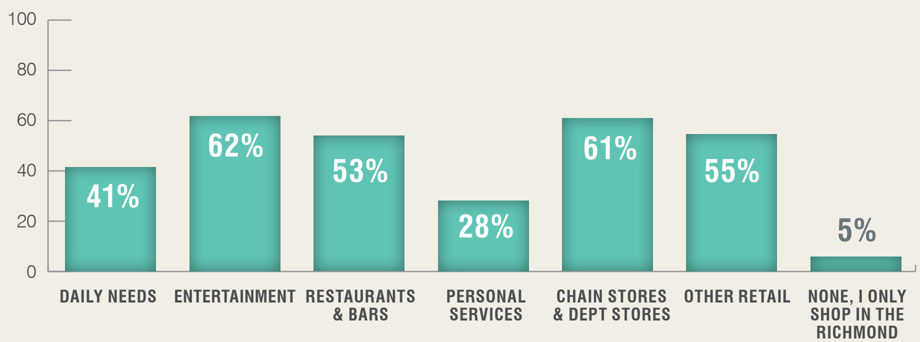
Source: SF Planning

Figure 6-2

WHAT BUSINESSES DO YOU VISIT FREQUENTLY IN THE RICHMOND?*

Figure 6-3

IF YOU LIVE IN THE RICHMOND, WHAT TYPE OF PURCHASES DO YOU HAVE TO GO OUTSIDE OF THE RICHMOND FOR?*



*The sum of responses do not equate to 100% because respondents were allowed to choose more than one answer.

6. COMMERCIAL AREAS

Respondents were asked to select the top two commercial corridors they most frequently visited within the Richmond neighborhood. Inner Clement commercial corridor was indicated as the first choice with 43 percent of respondents choosing this area as their top choice. Outer Geary commercial corridor came as the second top choice with 27 percent of respondents choosing this area as their second top choice.

BUSINESS TYPES

Respondents were also asked to rate the mix of businesses on the commercial corridors. Overall 56 percent felt the businesses served their needs, while another 22 percent felt neutral. Proportionally more shoppers (60 percent) in Inner Clement and Outer Geary found the business mix serving their needs compared to other commercial areas.

Respondents were also asked to identify what type of businesses they use most in the Richmond as opposed to those beyond the neighborhood. Businesses serving daily needs are the most common type of businesses serving Richmond residents, with 95 percent of respondents choosing this type of service. Restaurants and bars also ranked very high receiving 88 percent of respondents, followed by personal services with 49 percent of respondents. Entertainment businesses including music venues, clubs, movies, etc. were the businesses that Richmond residents frequented least often.

Similarly, when asked for what kind of businesses Richmond residents would go outside the Richmond, entertainment businesses ranked the highest with 62 percent. Additionally, a majority of respondents (61 percent) indicated that they would go outside of the Richmond to visit chain and department stores. Forty-seven respondents indicated that they only shop in the neighborhood. Respondents who live outside of the District, come to the Richmond to visit restaurants and bars most often. Additional trends between Richmond residents and those who visit the Richmond can be seen in Figure 6-2.

NEIGHBORHOOD DEFINING BUSINESSES

Respondents were also asked to identify small businesses that they consider integral to the neighborhood character. Green Apple Books, in the Inner Clement neighborhood commercial area, was by far the most frequently nominated business with 299 respondents. Other frequently mentioned businesses were Balboa Theater (114) in the Outer Balboa neighborhood

Figure 6-4

TOP FIVE INTEGRAL BUSINESSES IN THE RICHMOND DISTRICT CHOSEN BY SURVEY RESPONDENTS

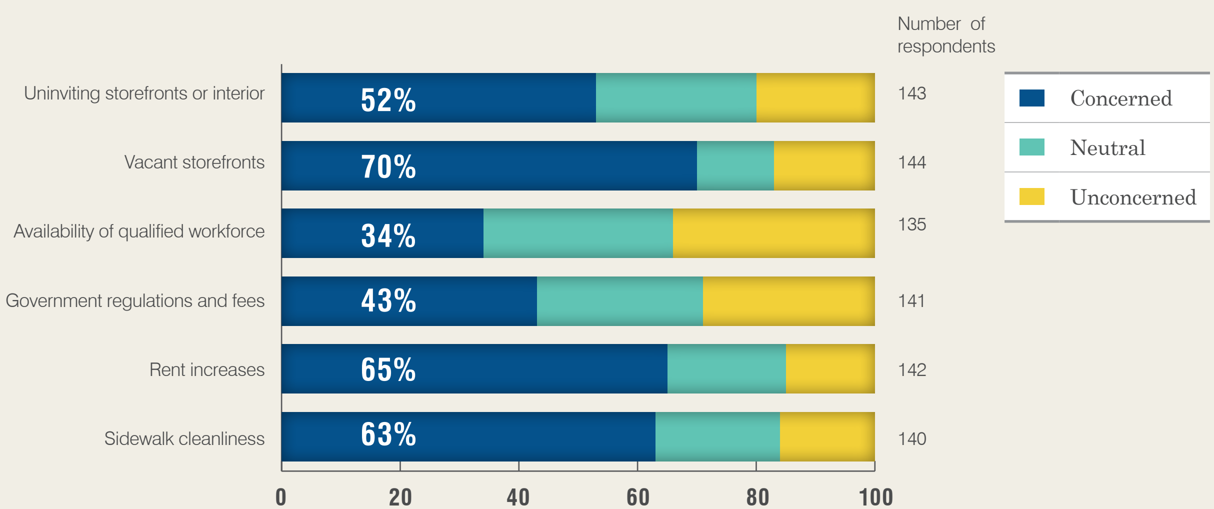
Source: Adam Roberts (Flickr)

Counterclockwise from top right: New May Wah Supermarket, Toy Boat Dessert Cafe, Green Apple Books, Balboa Theatre, and Burma Superstar

Figure 6-5
TOP INTEGRAL BUSINESSES IN THE RICHMOND

- ACE Hardware (38)
- Angelina's Café (39)
- Aziza (32)
- Balboa Theatre (114)
- Bazaar Café (36)
- Bill's Place (34)
- Burma Superstar (61)
- Cassava (30)
- Cinderella Bakery & Café (41)
- Clement Street Farmers Market (35)
- Gaspare's Pizza House (30)
- Giorgio's Pizzeria (61)
- Gordo Tacqueria (39)
- Green Apple Books (299)
- Joe's Ice Cream (43)
- Kaimei Restaurant Supply (49)
- Marla Bakery (32)
- New May Wah Supermarket (69)
- Park Life (46)
- Schubert's Bakery (36)
- Sushi Bistro (34)
- Tommy's Mexican Restaurant (31)
- Ton Kiang (32)
- Toy Boat Dessert Café (72)
- Four Star Theatre (44)
- Gables Stationery (30)
- Simple Pleasures Café (59)
- Walgreens (31)

Figure 6-6
IF YOU OWN A BUSINESS IN THE RICHMOND, RATE YOUR LEVEL OF CONCERN REGARDING THE FOLLOWING:



commercial area, Toy Boat Dessert Café (72) in the Inner Clement, and New May Wah Supermarket (69) also in Inner Clement. Map 6-2 shows all businesses that were mentioned at least 30 times.

BUSINESS OWNERS CONCERNS

Respondents who own a business in the Richmond were also given an opportunity to express concerns regarding small business operations. In total, 144 respondents answered this question. Vacant storefronts were the top issue indicated, with 101 of the respondents expressing this concern.

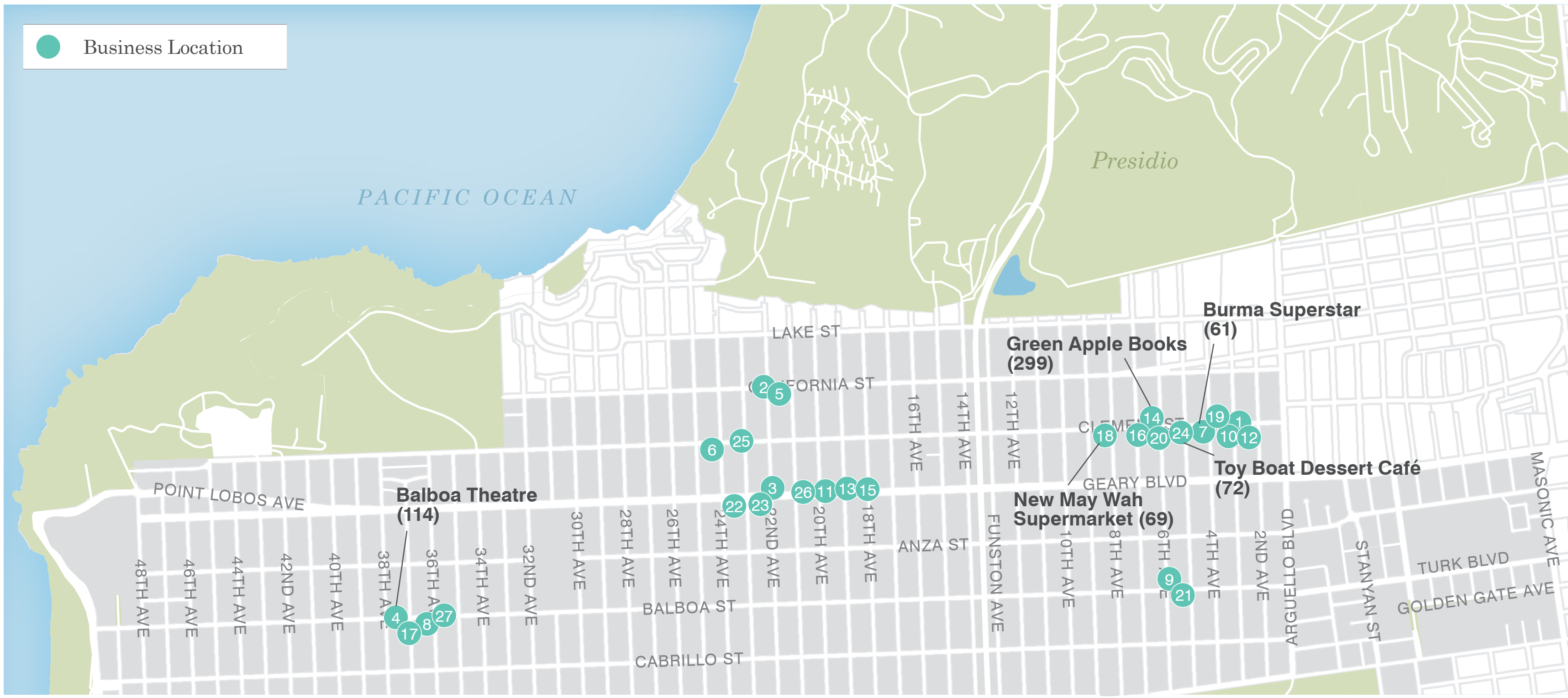
Aside from business owners, residents also expressed concern of commercial blight and vacant storefront in the write-in section at the end of the survey. Other top concerns included increases in rent, followed by sidewalk cleanliness, as shown in Figure 6-6.

QUALITY OF PUBLIC LIFE IN NEIGHBORHOOD COMMERCIAL AREAS

Respondents were asked to rate statements that described different aspects of the quality of public life in the commercial corridors. Overall, among all commercial areas in the Richmond, respondents were most interested in more greening and trees

Map 6-2

INTEGRAL NEIGHBORHOOD BUSINESSES DETERMINED BY SURVEY RESPONDENTS



1. ACE Hardware (38)
2. Angelina's Café (39)
3. Aziza (32)
4. **Balboa Theatre (114)**
5. Bazaar Café (36)
6. Bill's Place (34)
7. **Burma Superstar (61)**
8. Cassava (30)
9. Cinderella Bakery & Café (41)
10. Clement Street Farmers Market (35)
11. Gaspare's Pizza House (30)
12. Giorgio's Pizzeria (61)
13. Gordo Tacqueria (39)
14. **Green Apple Books (299)**
15. Joe's Ice Cream (43)
16. Kaimei Restaurant Supply (49)
17. Marla Bakery (32)
18. **New May Wah Supermarket (69)**
19. Park Life (46)
20. Schubert's Bakery (36)
21. Sushi Bistro (34)
22. Tommy's Mexican Restaurant (31)
23. Ton Kiang (32)
24. **Toy Boat Dessert Café (72)**
25. Four Star Theatre (44)
26. Gables Stationery (30)
27. Simple Pleasures Café (59)

along sidewalks (63 percent). Additionally, sidewalk cleanliness raised a concern in about half of all respondents.

Interest in greening and trees was the highest in the Outer Clement area with 70 percent of shoppers who frequent this commercial area expressing this need. This interest was lowest among respondents who shop in Outer Balboa (46 percent). Outer Balboa is the only commercial area that has recently undergone streetscape improvements and landscaping which may explain the lower interest in more greening or trees.

Sidewalk cleanliness was a major point of concern for both Inner Clement and Outer Geary commercial corridors. About 60 percent of Inner Clement shoppers and 56 percent of Outer Geary shoppers found the sidewalks insufficiently clean.

Respondents indicated that sidewalk space was insufficient to accommodate pedestrians along the Inner Clement commercial corridor at a much higher rate (46 percent) compared to the average in the other commercial areas (28 percent).

About 46 percent of respondents who shop in the Inner Clement area found that more sidewalk seating is needed. About 50 percent of those who frequent Inner Balboa thought that sidewalk seating is needed.

Clockwise from top right: Examples of intersection safety improvements, sidewalk improvements, and parklets.

Inner Geary shoppers expressed the largest interest for additional bicycle parking at 43 percent, followed by Inner Clement at 40 percent.

Respondents were overall least concerned with sidewalk lighting at night. Respondents who shop in Inner Balboa or Outer Clement raised this concern at the highest rate which was still less than a third of the respondents. Conversely, about 44 percent of Outer Geary shoppers indicated that sidewalks were well lit at night, the highest response rate amongst all commercial areas.

7. PARKS, RECREATION, AND OPEN SPACE

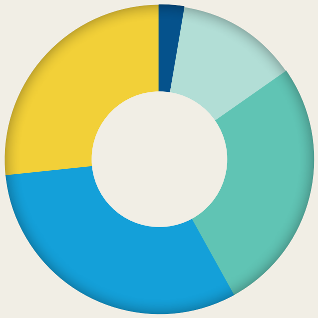
Respondents were asked to choose the three parks or public places that they utilize most often. Golden Gate Park was by far the most visited park, followed by Lands End and Ocean Beach. Respondents were also able to write in specific neighborhood parks that were not listed in the survey options. Some of these areas included the Presidio, Baker Beach and Sutro Park. In addition, many respondents called out specific neighborhood parks or playgrounds, such as: Argonne, Fulton, Rochambeau and Cabrillo Playgrounds.

RECREATIONAL SERVICES

Respondents were asked to indicate the type of recreational services that they need but find hard to access. The overwhelmingly common theme was the need for additional sporting facilities, such as basketball courts and soccer/baseball fields. Further, many indicated that, aside from the YMCA, gym and fitness facilities are lacking within the District overall. Although Rossi Pool is available as a public facility, 71 respondents expressed that it was difficult to access because of the limited available times for public recreational swim. Some

Figure 7-1

HOW OFTEN DO YOU VISIT GOLDEN GATE PARK?

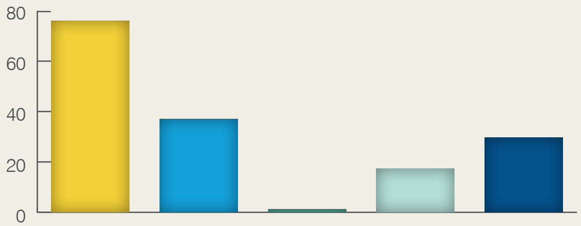


	% OF RESPONDENTS
I do not visit Golden Gate Park	3%
Every other month	13%
About once a month	26%
Once a week	31%
A few times a week	27%

(1,018 Respondents)

Figure 7-2

WHAT MODE OF TRANSPORTATION DO YOU USE TO TRAVEL TO GOLDEN GATE PARK?*



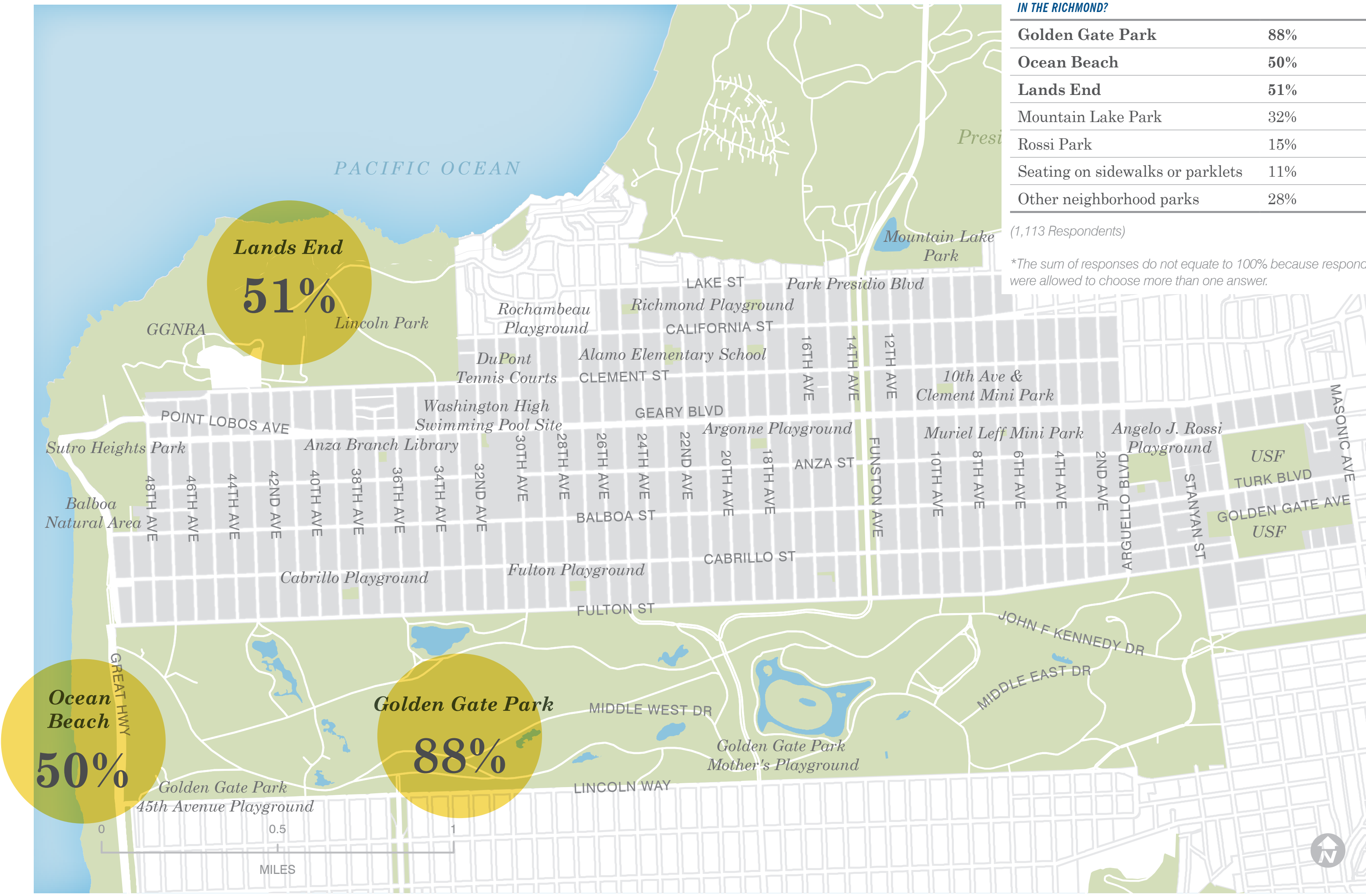
	% OF RESPONDENTS
I ride my bike	30%
I take transit	17%
I don't go to the park	1%
I drive	37%
I walk	76%

(1,007 Respondents)

** The sum of responses do not equate to 100% because respondents were allowed to choose more than one answer.*

Map 7-1

PARKS FREQUENTLY VISITED BY SURVEY RESPONDENTS IN THE RICHMOND



WHICH THREE PARKS DO YOU VISIT FREQUENTLY IN THE RICHMOND?	% OF RESPONDENTS
Golden Gate Park	**88%**
Ocean Beach	**50%**
Lands End	**51%**
Mountain Lake Park	32%
Rossi Park	15%
Seating on sidewalks or parklets	11%
Other neighborhood parks	28%

(1,113 Respondents)

**The sum of responses do not equate to 100% because respondents were allowed to choose more than one answer.*

Source: SF Planning

even expressed the desire for an additional swimming pool within the District.

USE OF GOLDEN GATE PARK

Golden Gate Park borders the southern edge of the District and is a highly accessible for people who live, work or frequent the Richmond. As seen in Figure 7-1, over half of all respondents visit Golden Gate Park at least once a week, while less than 3 percent of respondents do not visit.

Walking is the most utilized mode of transportation going to the park, followed by driving and biking. Public transit is the least utilized mode of travel to Golden Gate Park amongst respondents (Figure 7-2).

Respondents were also asked to indicate their point of entries to the Park along Fulton Street and to rate their perceptions of safety at those entry points. The most frequently mentioned unsafe intersections include: Fulton St and 25th Ave, Park Presidio Blvd and 8th Ave. The top three safest intersections, include Fulton St at 8th Ave, 10th Ave, and Arguello Blvd. Fulton St and 8th Ave was perceived as both safe (108 respondents) and unsafe (73 respondents). As previously discussed in the Existing Condition Report (pg. 81), there are many intersections with unmarked crosswalks or ones that lack traffic signals

Figure 7-3

SAFE & UNSAFE INTERSECTION USED TO ENTER GOLDEN GATE PARK

SAFE	UNSAFE
Fulton St & 8th Ave	Fulton St & 25th Ave
Fulton St & 10th Ave	Fulton St & Park Presidio Blvd
Fulton St & Arguello Blvd	Fulton St & 8th Ave

RECOMMENDED IMPROVEMENT INTERSECTIONS

Fulton St & 8th Ave

Fulton St & Arguello Blvd

Fulton St & 10th Ave

Fulton St & 25th Ave

No sidewalk lighting

RECOMMENDED IMPROVEMENT AREAS

Golden Gate Park lack of visible entrance

Lack of crosswalks into GGP

Lack of sidewalk cleanliness

More park trails signage

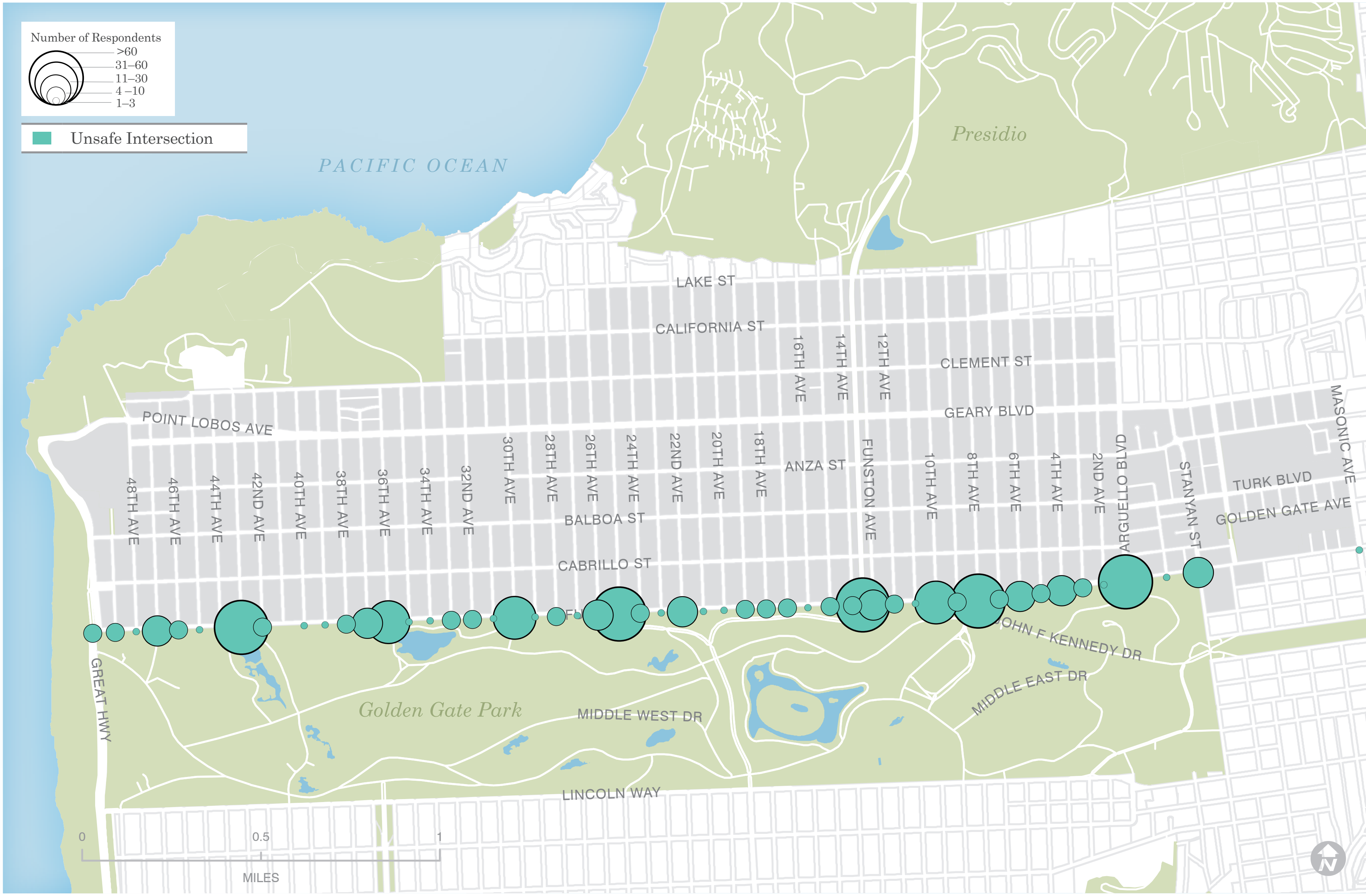
or stop signs. However, the intersections that respondents felt were the least safe are all traffic controlled with marked crosswalks and major access points leading into the park. Although 8th Ave and Fulton St is the most frequently identified safe intersection, it is also an intersection that has experienced severe injuries, as described in Map 6-4 of the Existing Conditions Report. Park Presidio Blvd at Fulton St was also identified as an intersection with severe injuries in the Report.

About 57 percent of respondents expressed feeling safe and comfortable during their travel to the park (Figure 7-3). In terms pedestrian improvements along Fulton St, over 70 percent of respondents indicated that improved crosswalks and pedestrian safety are an important issue (only 6 percent disagreed with this statement). About 60 percent of respondents agreed that trails off of Fulton St need improvement, while 38 percent of respondents indicated that bus stops near and within the park need improvement.

- **Improve crosswalks and pedestrian safety on Fulton St**
  - Pedestrian and bike safety within and around the park
  - Traffic and vehicular speeds along Fulton St were concerning
  - Entrances to the park for pedestrian and bicycles need to be more accessible and visible.
- **Improve parks trails off Fulton**
  - Easier navigation of park trails and more wayfinding signage, more marked trails, etc.
- **Improve bus stops near and/or within the park**
  - More bus shelters are needed
  - Cleanliness and vandalism at bus stops.
- **Other**
  - The number of homeless and vagrants in the park pose a safety concern
  - Better and more lighting is needed within and around the park
  - More police enforcement and presence needed within and around the park.

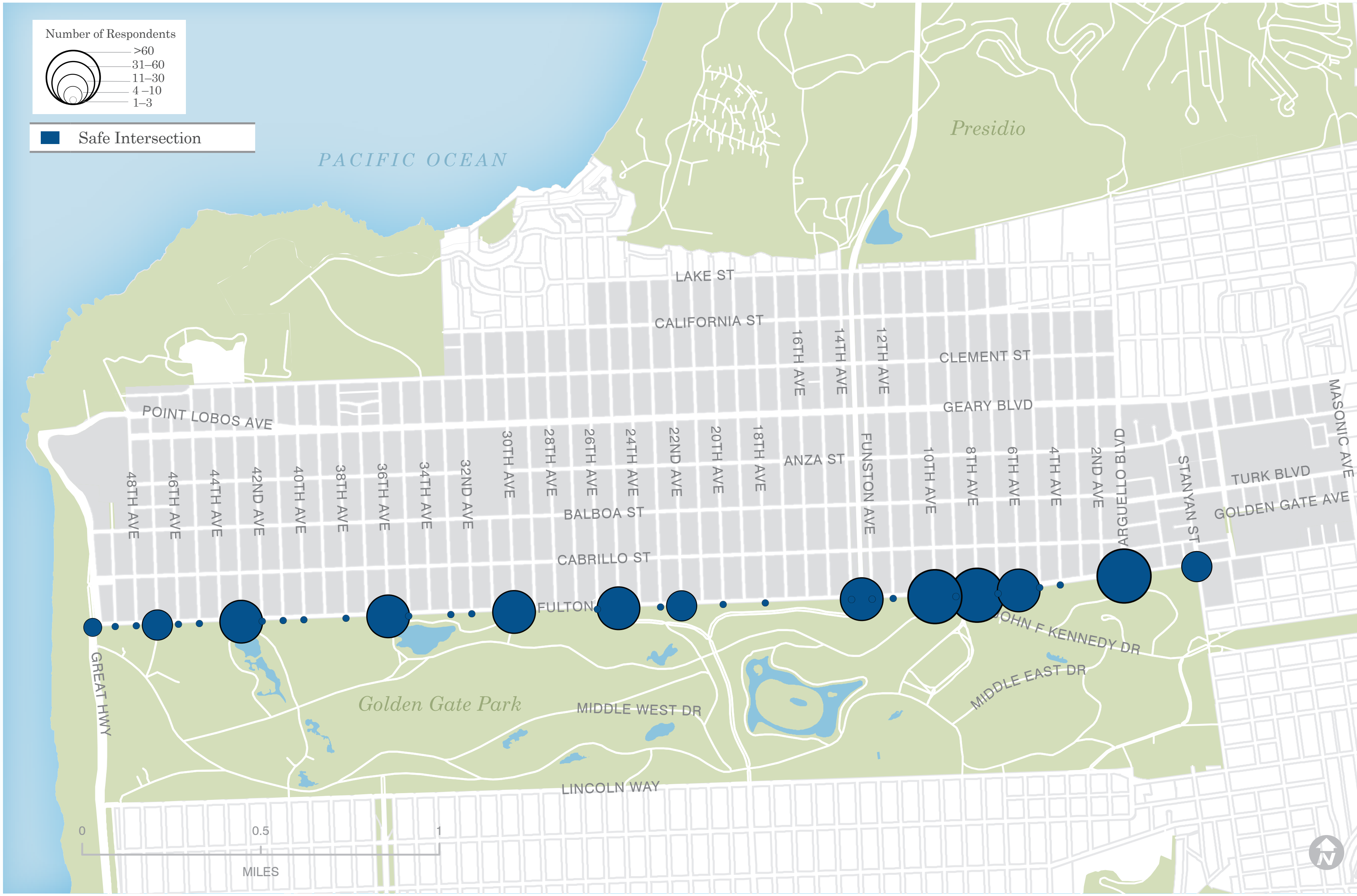
Map 7-2

INTERSECTIONS USED BY RESPONDENTS TO ENTER GOLDEN GATE PARK THAT ARE PERCEIVED AS UNSAFE



Map 7-3

INTERSECTIONS USED BY RESPONDENTS TO ENTER GOLDEN GATE PARK THAT ARE PERCEIVED AS SAFE



8. COMMUNITY FACILITIES

The most commonly mentioned community facilities that respondents utilize in the Richmond are libraries (70 percent of respondents), followed by museums and community centers (Figure 8-1). Both the Anza Branch Library and the Richmond/Senator Milton Marks Branch Library were widely mentioned amongst respondents. Additionally, museums such as the de Young, Legion of Honor and the California Academy of Sciences were also frequented. The Richmond Recreation Center, the YMCA, the Richmond District Neighborhood Center (RDNC), and various senior centers in the District were also commonly identified as community centers that were visited.

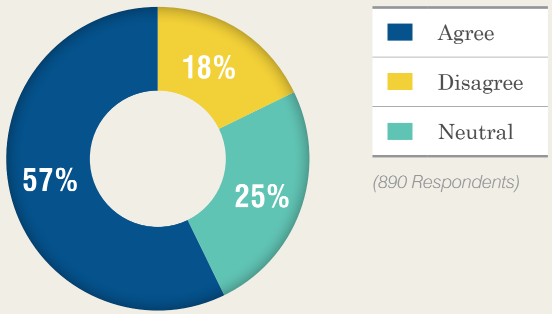
A majority of respondents (77 percent) expressed that they did not need any other type of community service or facilities as opposed to 23 percent who expressed a need for more (Figure 8-2).

If respondents felt that they needed additional community services or facilities, they were able to specify these needs in the survey. Some of the common needs, included:

» More gym and fitness facilities, and

Figure 7-3

I FEEL SAFE AND COMFORTABLE ON MY TRAVEL TO GOLDEN GATE PARK



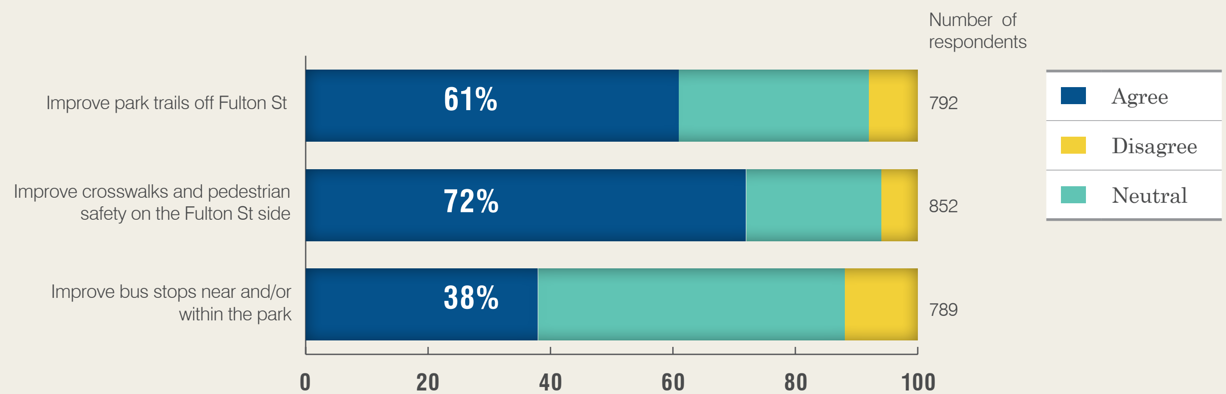
"Need more trail entrances and better lighting."

"Better lighting in evening and night time, well-lit bus stops."

"Homeless encampments are an issue; not enough lighting and monitoring to walk at dusk or night."

Figure 7-4

SURVEY RESPONDENTS' INTEREST IN IMPROVEMENTS TO THEIR TRAVEL TO GOLDEN GATE PARK



"Cars speeding into the park and turning at Fulton are a major hazard to all park users, other drivers included."

"I always feel like the crosswalks are unsafe. Drivers are in too big a hurry and cyclists don't follow the rules of the road."

"Slow down Fulton Street traffic"

"When walking around the park, I feel somewhat safe in the daytime, but not at all when it is dark."

Figure 8-1

COMMUNITY FACILITIES MOST FREQUENTED BY SURVEY RESPONDENTS

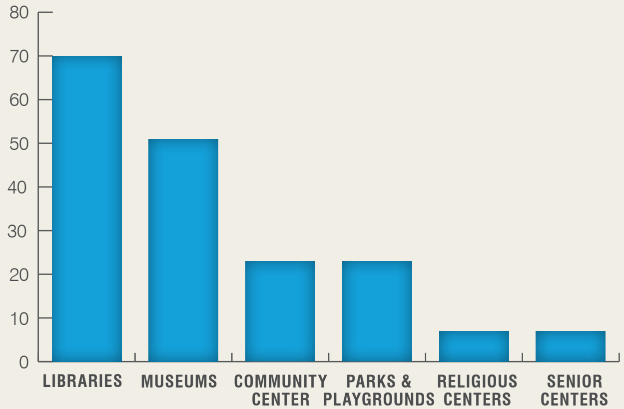
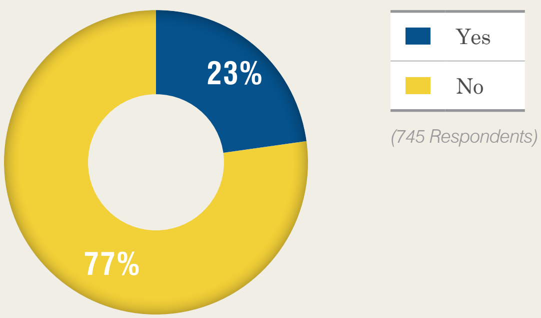


Figure 8-2

DO YOU NEED ANY OTHER TYPE OF COMMUNITY SERVICE OR FACILITY?



"I almost always think that my car will be broken into when I park in Golden Gate Park, even if I have nothing in sight."

"Walking through the park (even main thoroughfares) at night can be difficult as it's quite dark and the few streetlights are often out..."

swimming pools

- More social and community services (i.e., housing assistance, mental health/ healthcare facilities)
- More senior services
- More activities/facilities for kids and teens
- More community centers for communal and shared use.

In regards to whether respondents felt that their cultural, ethnic, or religious groups were sufficiently supported in Richmond, about 40 percent of the 200 respondents felt supported. A wide array of ethnicities did not feel supported in the Richmond, such as Latinos, African Americans, Muslims, Indians, Southeast Asians, Filipinos, LGBT community, Japanese Americans, Irish Americans, and low and middle income immigrant families.

Lastly, 518 respondents provided additional comments and information they wanted to share with the City. Some feedback further emphasized issues already mentioned in the survey, such as the need for more affordable housing, more social services, more enforcement of high vehicular speeds along certain streets in the neighborhood, pedestrian safety issues, and preserving the family-oriented aspect of the neighborhoods. However, some additional issues that were not discussed included the following:

- Improving the reliability, frequency, and faster travel time on public transit
- Preserving parks and greens space
- Parking becoming increasingly difficult to find in the Richmond.
- Better maintenance of road conditions, including more frequent street paving and more trash pick-up on streets and sidewalks
- Homelessness in the District and in Golden Gate Park
- Crime and car break-ins; and
- Commercial blight and vacant storefronts.

9.NEXT STEPS

Learning from the results of the Existing Conditions analysis in Phase one and the Community Needs Assessment in Phase two, the following topics have been identified that are of high importance and priority to residents, employees, and visitors of the Richmond District:

- Community stabilization for residents and small businesses related to changes in the neighborhood including but not limited to the forthcoming Geary BRT, development, and other economic development drivers.
- Affordable housing production including but not limited to housing for seniors, families with children, homeless population, etc.
- Housing development along major transit corridors
- Public realm improvements
- Transit improvements
- Pedestrian safety improvements
- Community facilities
- Nighttime entertainment

The last and third phase of the Richmond District Strategy will initially focus on the first three topics listed above. Subsequently, the outreach effort may be expanded to incorporate the full list of priorities.