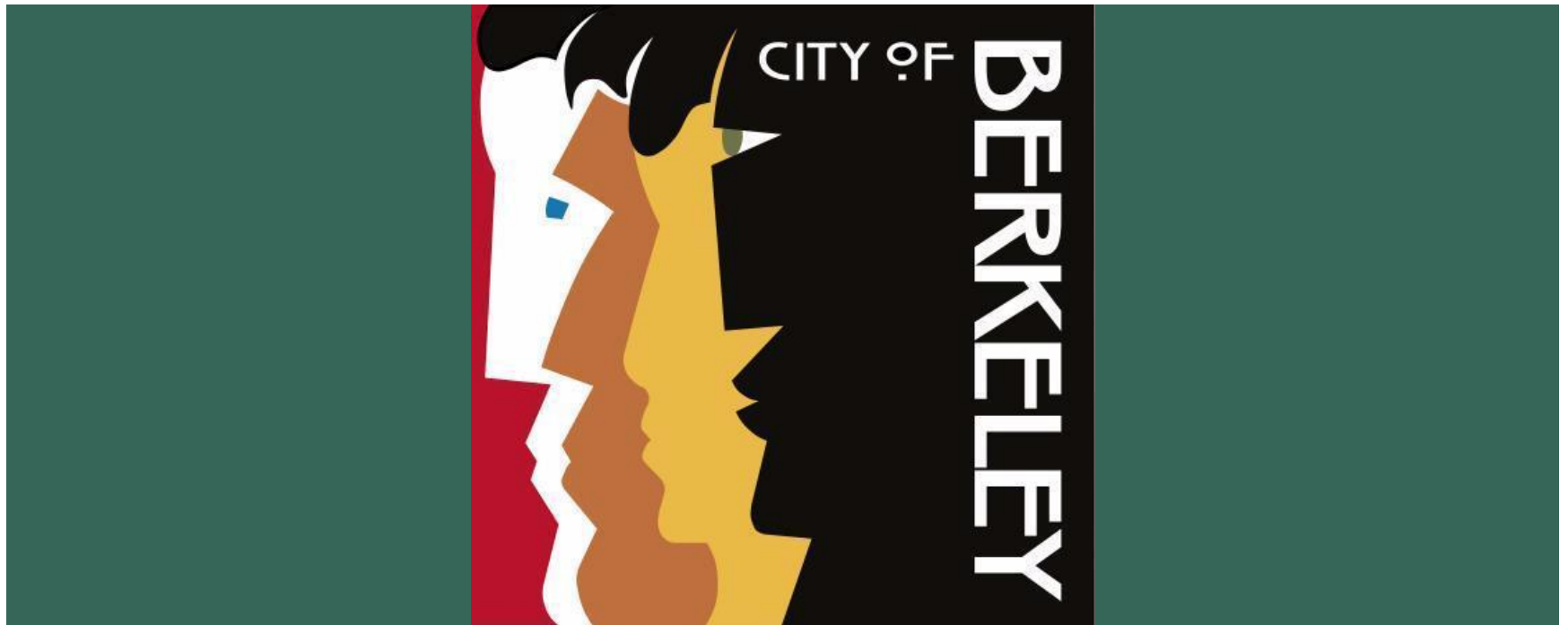


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# SAN PABLO AVENUE COMMERCIAL DISTRICT

ECONOMIC DEVELOPMENT WORK SESSION, DECEMBER 13, 2016



# AGENDA

- Study Area and Methodology
- Historic Context
- Demographic Composition
- Urban Form
- Commercial Nodes
- Business and Employment Statistics
- Real Estate Trends
- Community Assets and Initiatives
- Challenges & Opportunities
- Q&A

# STUDY AREA AND METHODOLOGY

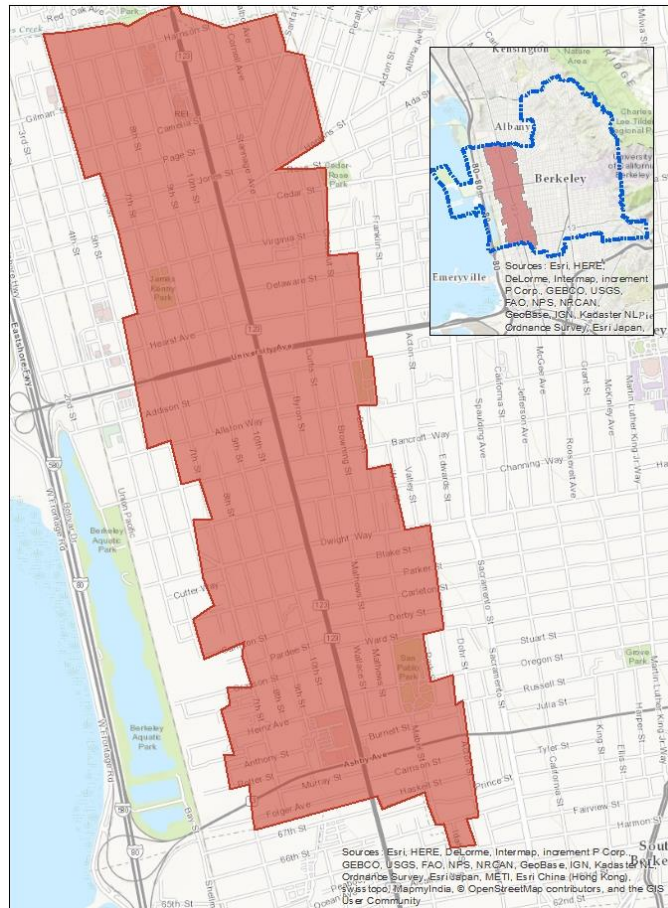
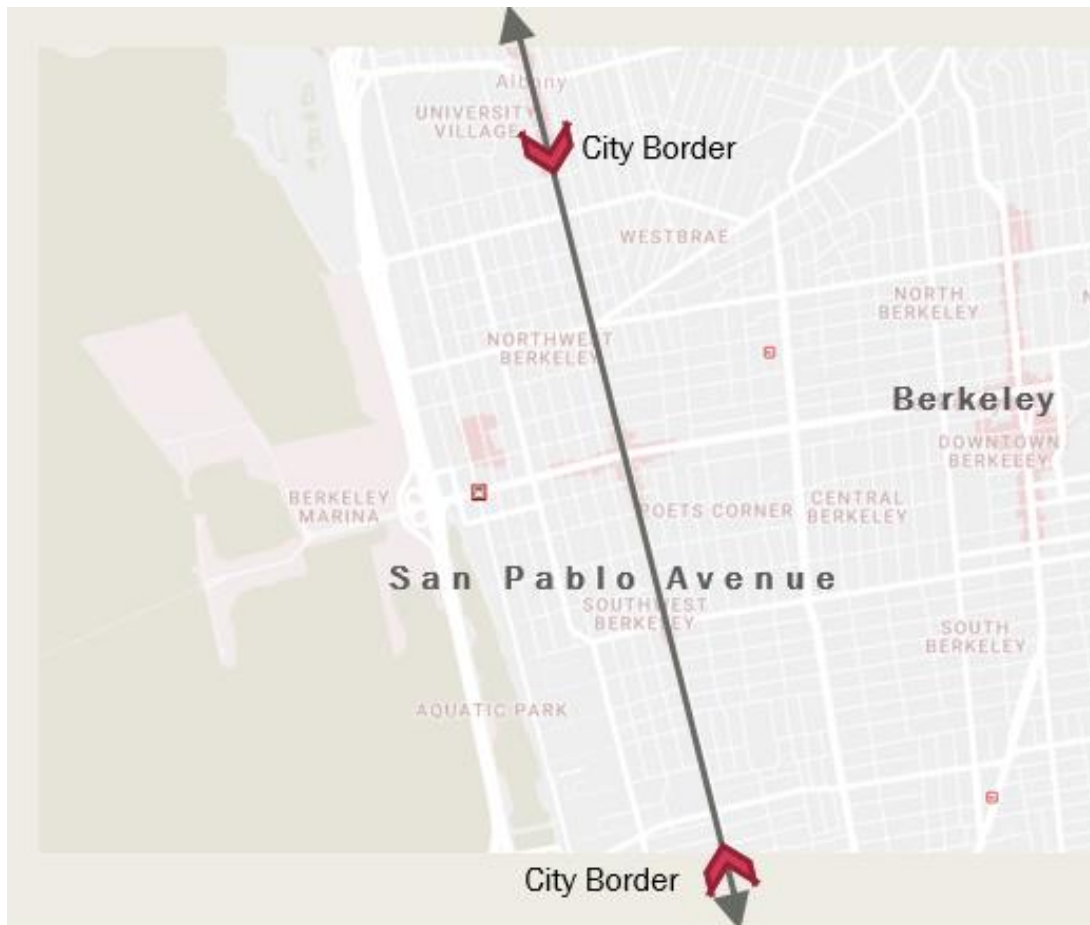


Image source: ESRI Business Analyst. The highlighted region represents the area within a quarter mile of the five nodes on the San Pablo commercial corridor.

# STUDY AREA AND METHODOLOGY



- Literature Review
- Data Sources
  - Demographics: Census Bureau, ESRI Business Analyst
  - Businesses & Employment: EDD, MuniServices, OED
- Stakeholder Interviews
- City Staff Focus Group

Note: The San Pablo commercial corridor business data presented is limited to San Pablo Avenue addresses in Berkeley.

# HISTORIC CONTEXT



Sign at University and San Pablo. Photo: Berkeley Historical Society



Berthelsen Motorcycle Garage at 2032 San Pablo, c1915.  
Photo: Digital Public Library of America



Key Route Tracks, San Pablo at University. Photo: Quirky Berkeley



Former Rivoli Theater at University and San Pablo.  
Photo: Berkeley Architectural Heritage Association

# PAST PLANS AND INITIATIVES

## ■ West Berkeley Plan (1993)

- Goals for San Pablo included fostering neighborhood retail development while protecting manufacturing businesses; improved transit connections; and improving environmental quality

## ■ San Pablo Revitalization Program (1998)

- Façade improvement grants
- Enforcement of city codes on blighted sites; development of vacant and underutilized sites

## ■ San Pablo Public Improvement Plan (2003)

- Identified community concerns about San Pablo Avenue conditions
- Focused on pedestrian appeal, safety, and accessibility
- Resulted in creation of unofficial design guidelines for the corridor, still in use

## ■ “Plan Bay Area” (MTC/ABAG) (2013)

- San Pablo Avenue is designated as a Priority Development Area (PDA); future housing growth and transit resources will be targeted for San Pablo



# DEMOGRAPHIC COMPOSITION





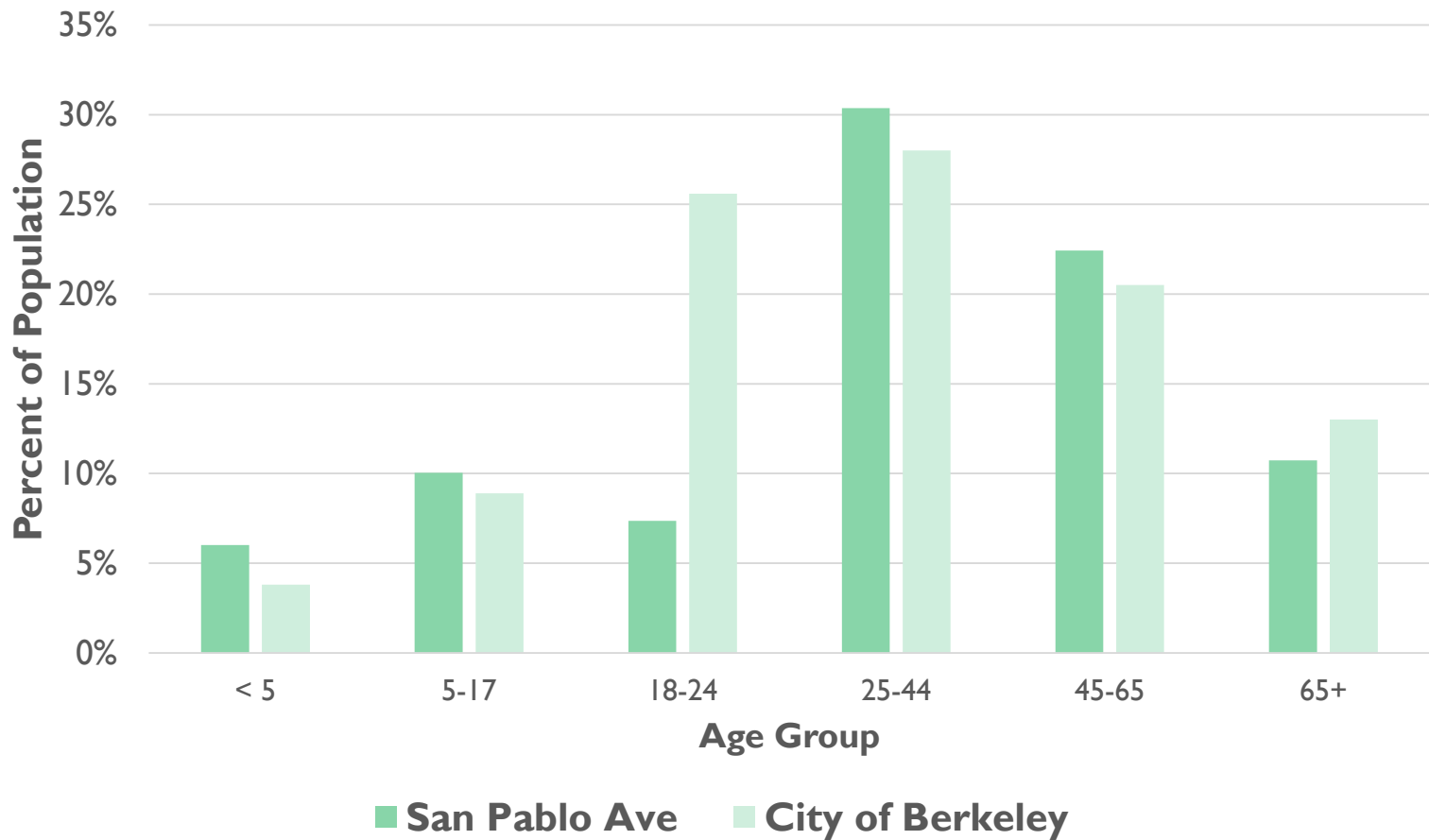
# SAN PABLO AREA DEMOGRAPHICS

- Total population: **14,708** (12.7% of Berkeley's population)
- **7,180** Housing Units (14.6% of Berkeley housing stock)
- Renters: **42.6%**  
Homeowners: **57.4%**
- Median income: **\$66,151**  
Median income citywide: **\$65,283**
- Unemployment Rate: **7.13%**  
Workforce Participation (age 16+): **69.3%**

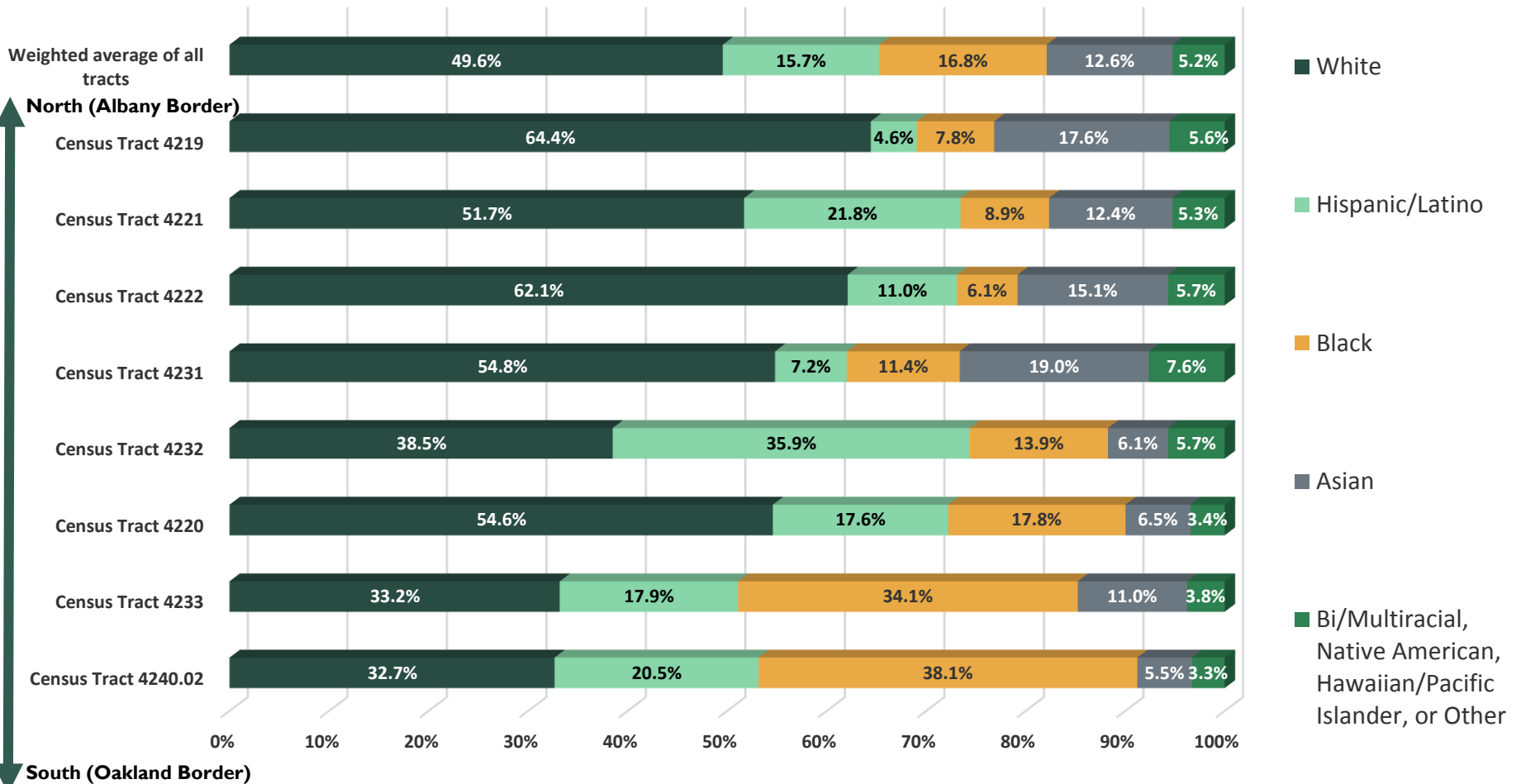
Source: US Census Bureau. Median income estimates reflect weighted average of median incomes for eight Census tracts bordering San Pablo Ave, American Community Survey, 2010-2014 Rolling Sample. All other figures are for the area highlighted on the map on Slide 2, accessed via ESRI Business Analyst.



# RESIDENTS BY AGE GROUP, SAN PABLO AVENUE-ADJACENT TRACTS AND CITY OF BERKELEY, 2010-2014 ESTIMATES

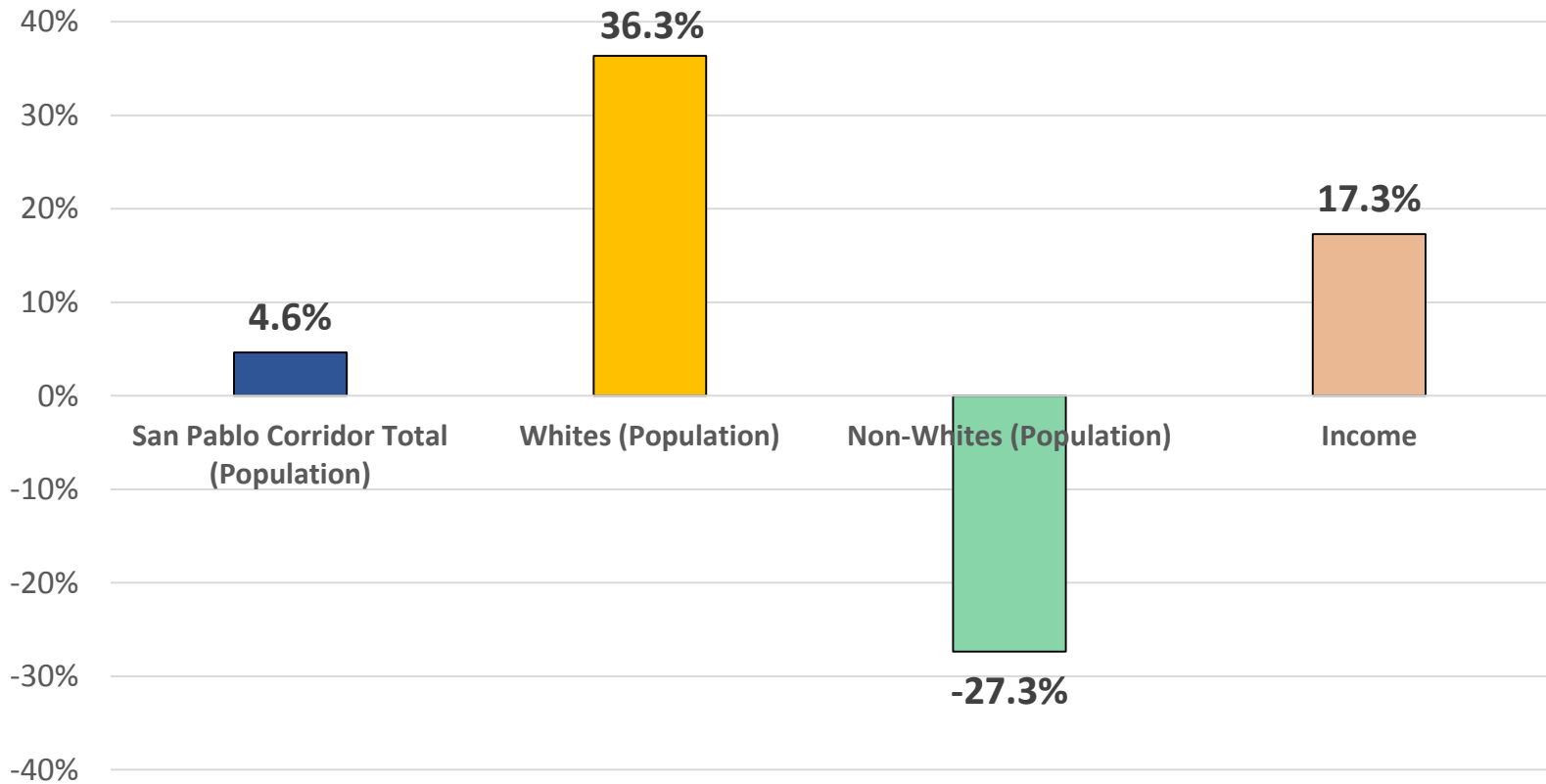


# RACIAL/ETHNIC COMPOSITION, SAN PABLO-ADJACENT CENSUS TRACTS



Source: US Census Bureau, American Community Survey, 2010-2014 Rolling Sample

# CHANGE IN POPULATION, RACIAL GROUPS, AND INCOME, SAN PABLO-ADJACENT CENSUS TRACTS, 2000-2014



Note: Income is in 2014 Dollars. Source: American Community Survey (ACS) Estimates 2010-2014; 2000 Census



# URBAN FORM



# URBAN FORM



Top: Biker crosses at San Pablo and Virginia (facing northwest)



Left: Auto-Oriented Uses at San Pablo and Virginia (facing southwest)

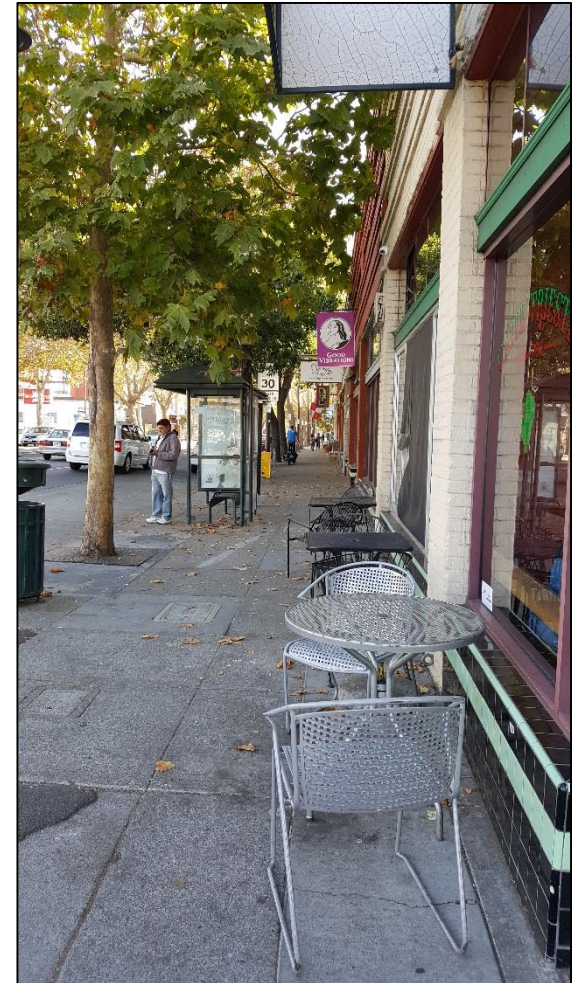


# URBAN FORM



Above: Intersection of San Pablo and Ashby, facing southwest

Right: Shops near the intersection of San Pablo and Dwight, a pedestrian-friendly retail/restaurant segment



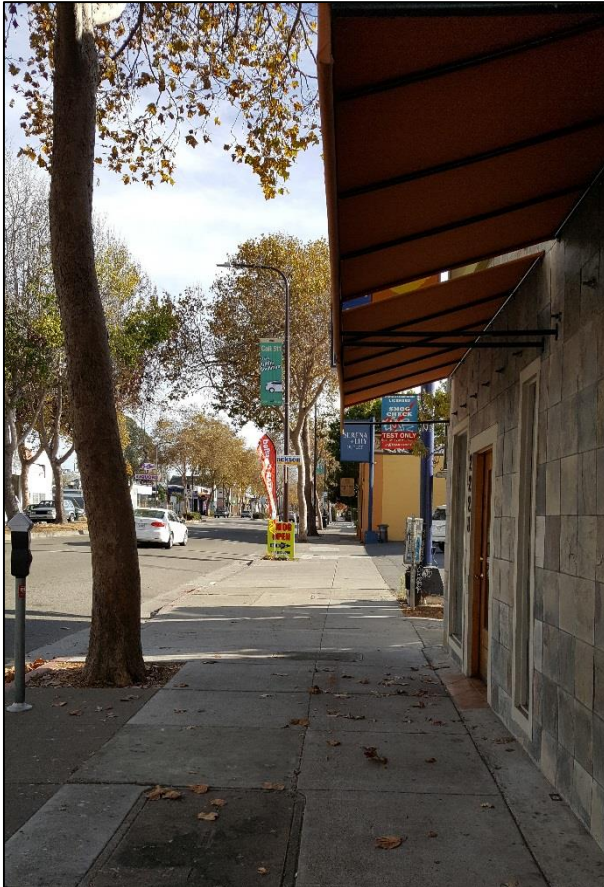
# URBAN FORM



Historic Heinz Building, San Pablo and Ashby

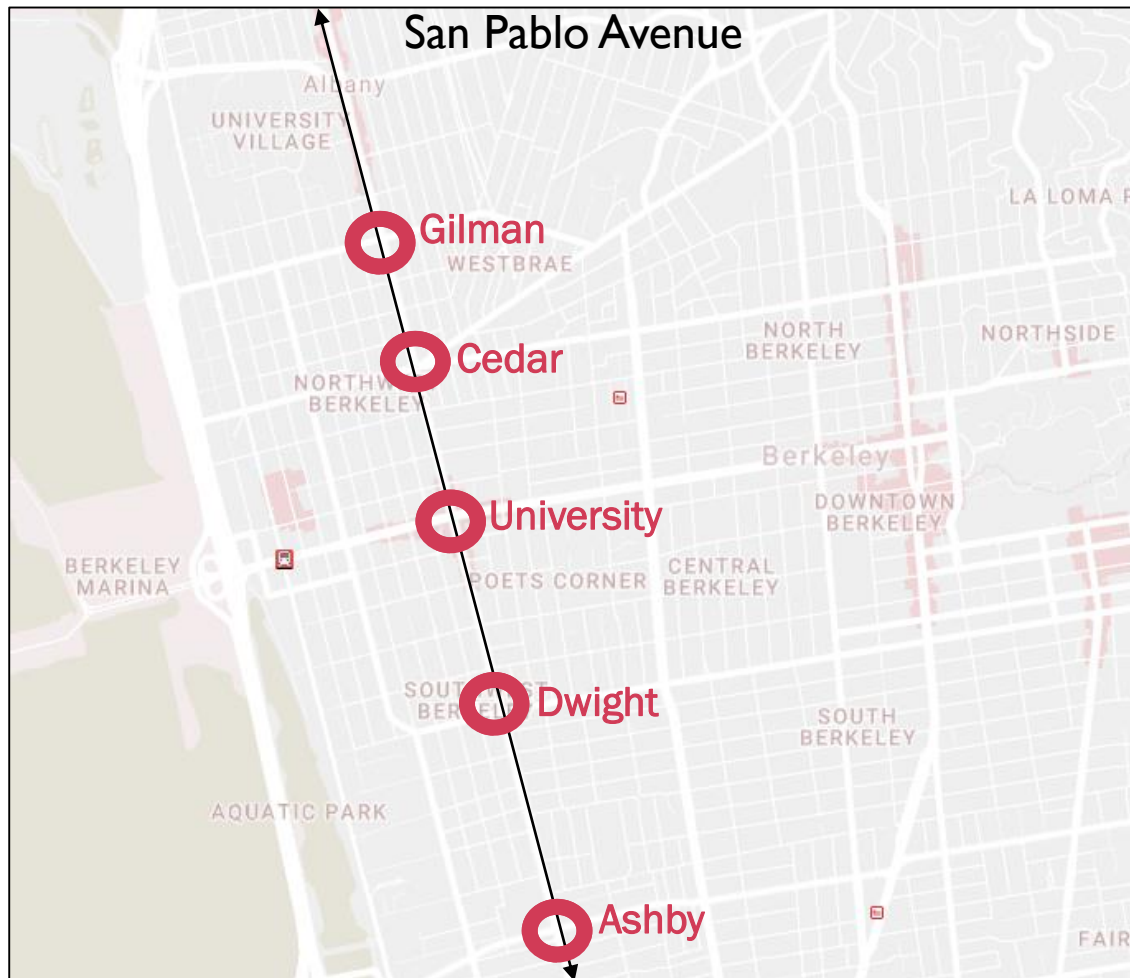


# URBAN FORM



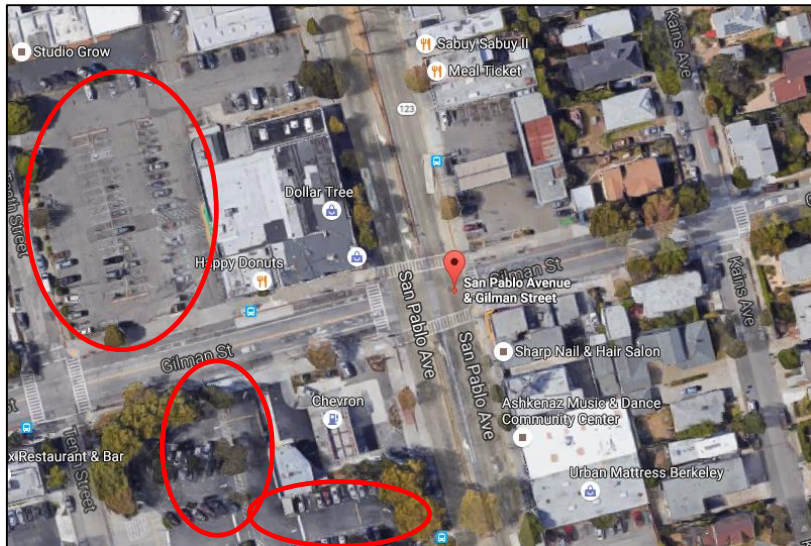
Left: Curb cuts into parking lots interrupt the pedestrian environment  
Top: Parking lots entrances on NE side of University and San Pablo

# COMMERCIAL NODES





# GILMAN AND SAN PABLO



**Note:** Parking lots are highly visible from node. Image Source: Google Maps

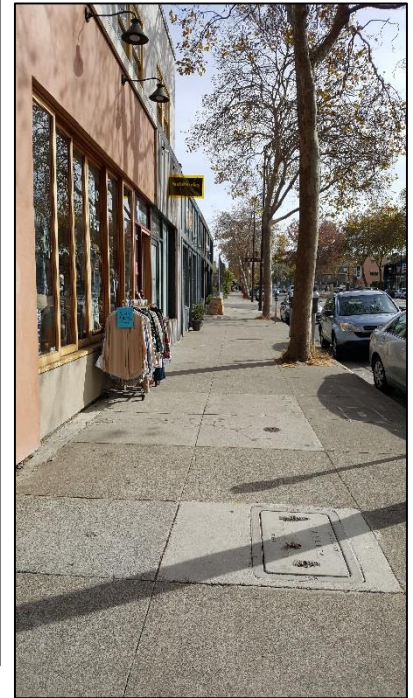




# CEDAR AND SAN PABLO

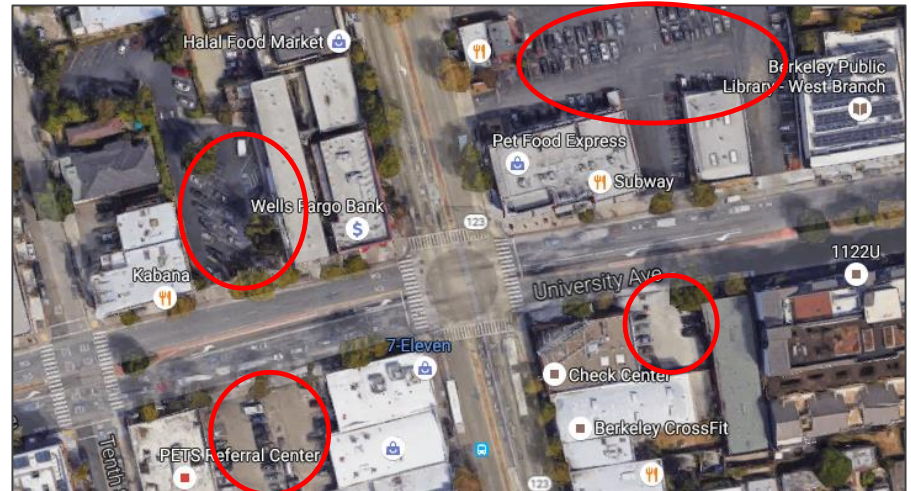


Aerial image Source: Google Maps





# UNIVERSITY AND SAN PABLO

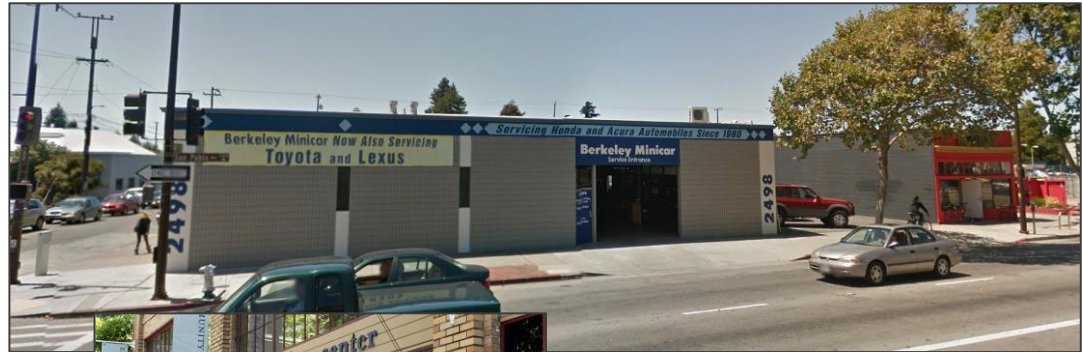
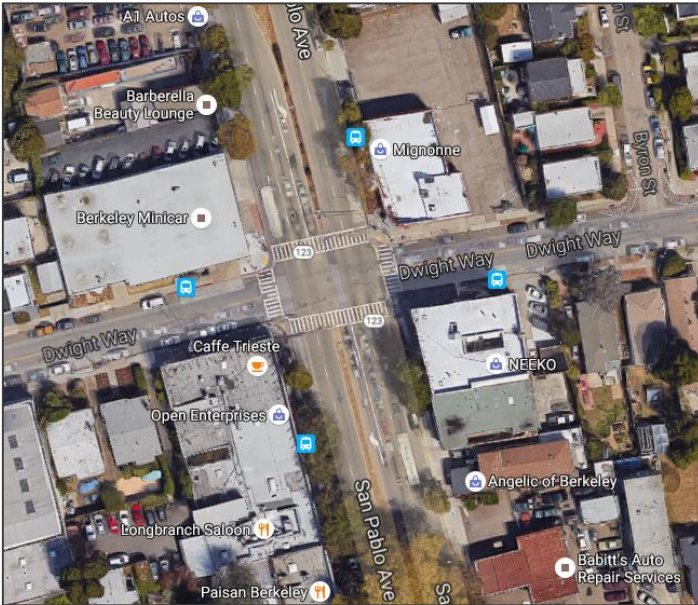


Note: large number and coverage of surface parking lots. Image Source: (left and above) Google Maps



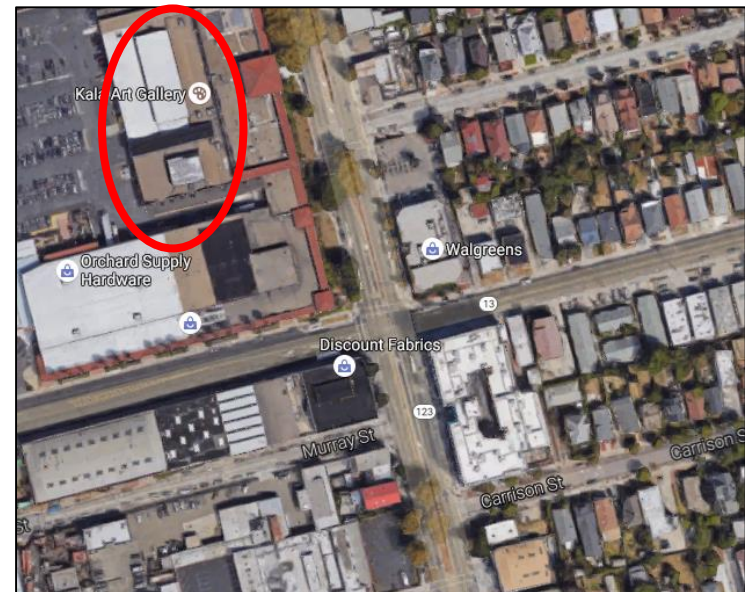


# DWIGHT AND SAN PABLO





# ASHBY AND SAN PABLO



**Note:** Surface parking fully obscured from street.  
Image Source: Google Maps

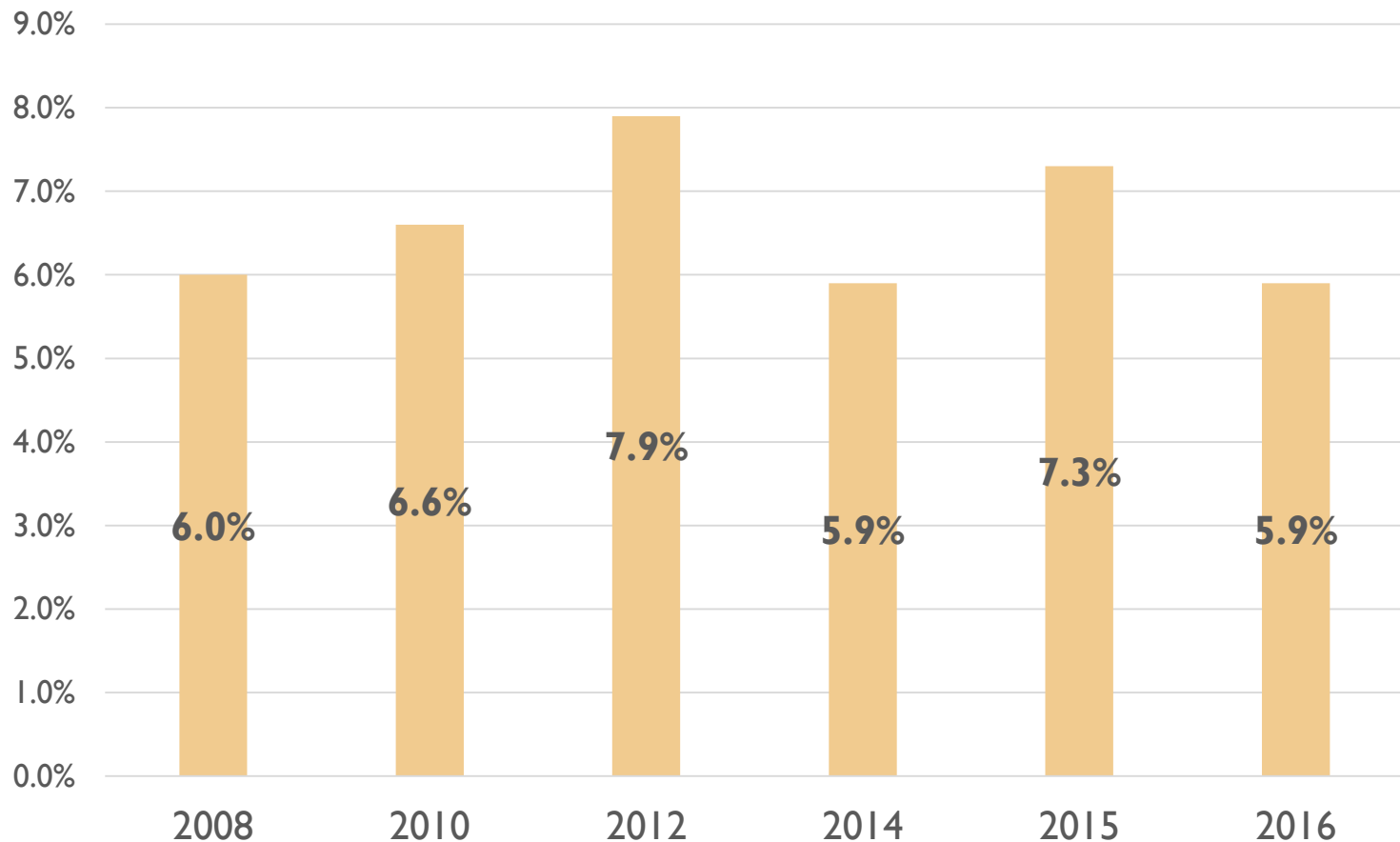




# BUSINESS AND EMPLOYMENT STATISTICS

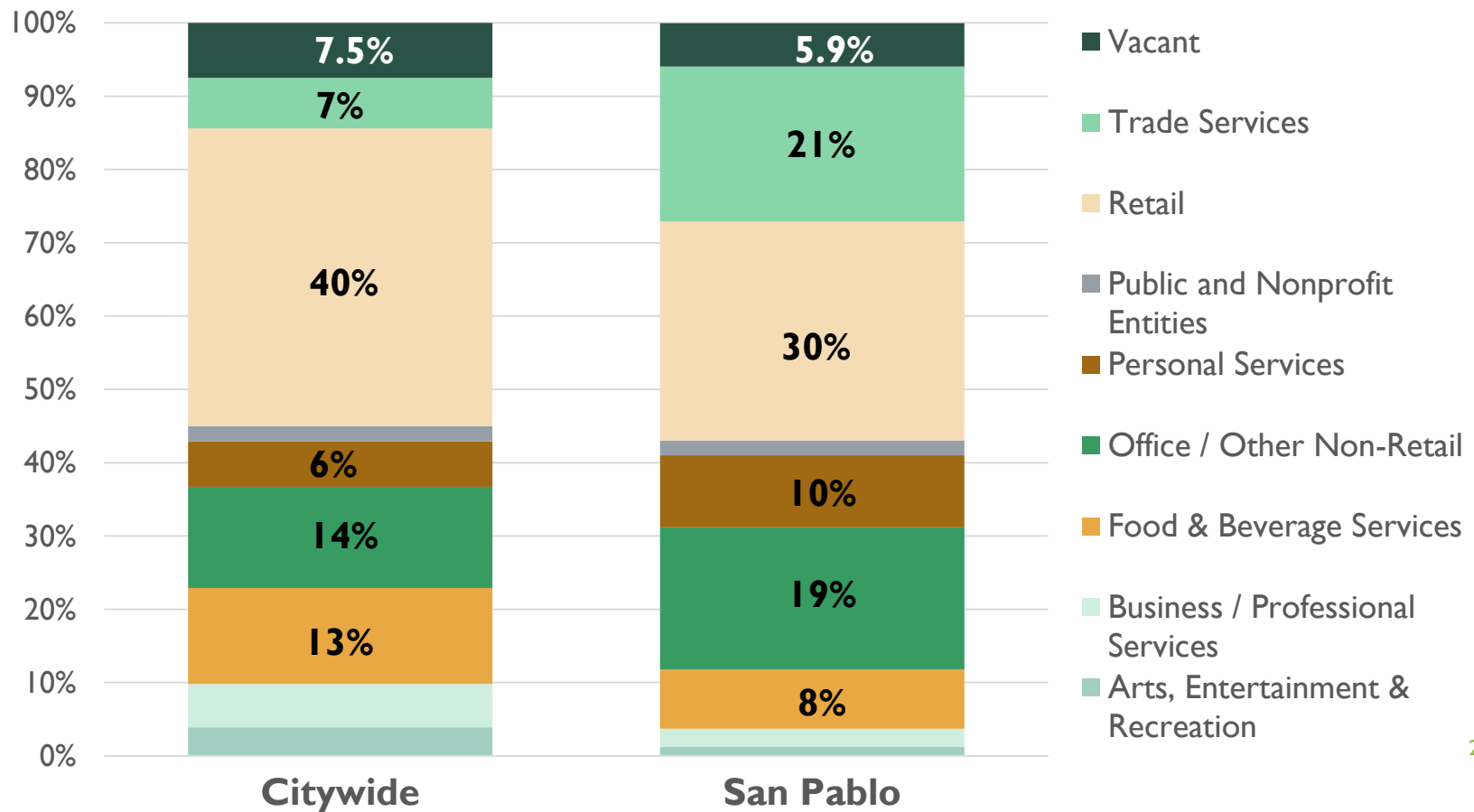


# GROUND FLOOR COMMERCIAL VACANCY RATE (BY SQUARE FOOTAGE), 2008-2016

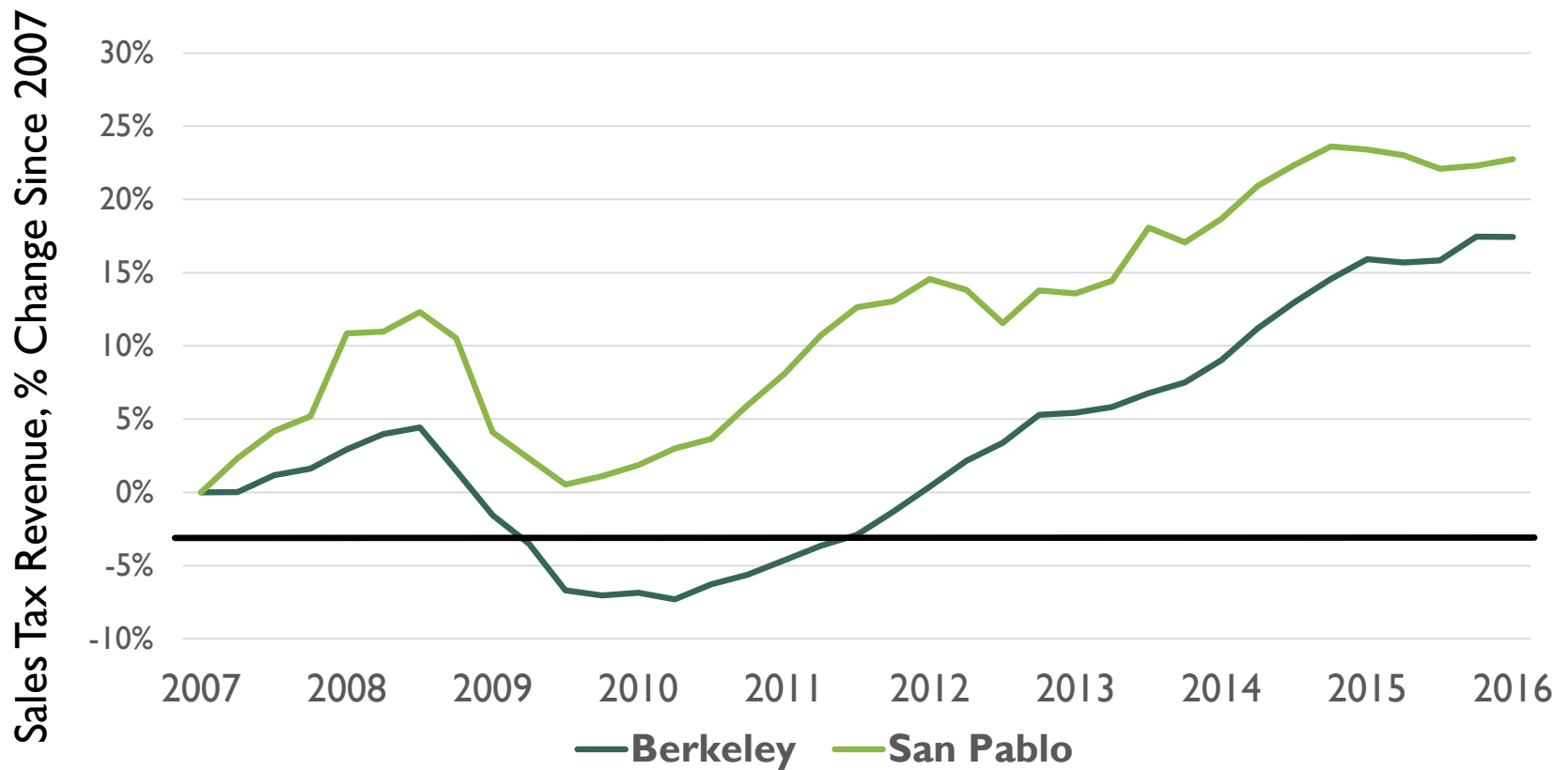


Source: Vacancy Database, Office of Economic Development, City of Berkeley

# GROUND FLOOR COMMERCIAL OCCUPANCY BY CATEGORY, BY SQUARE FOOTAGE, Q3 2016

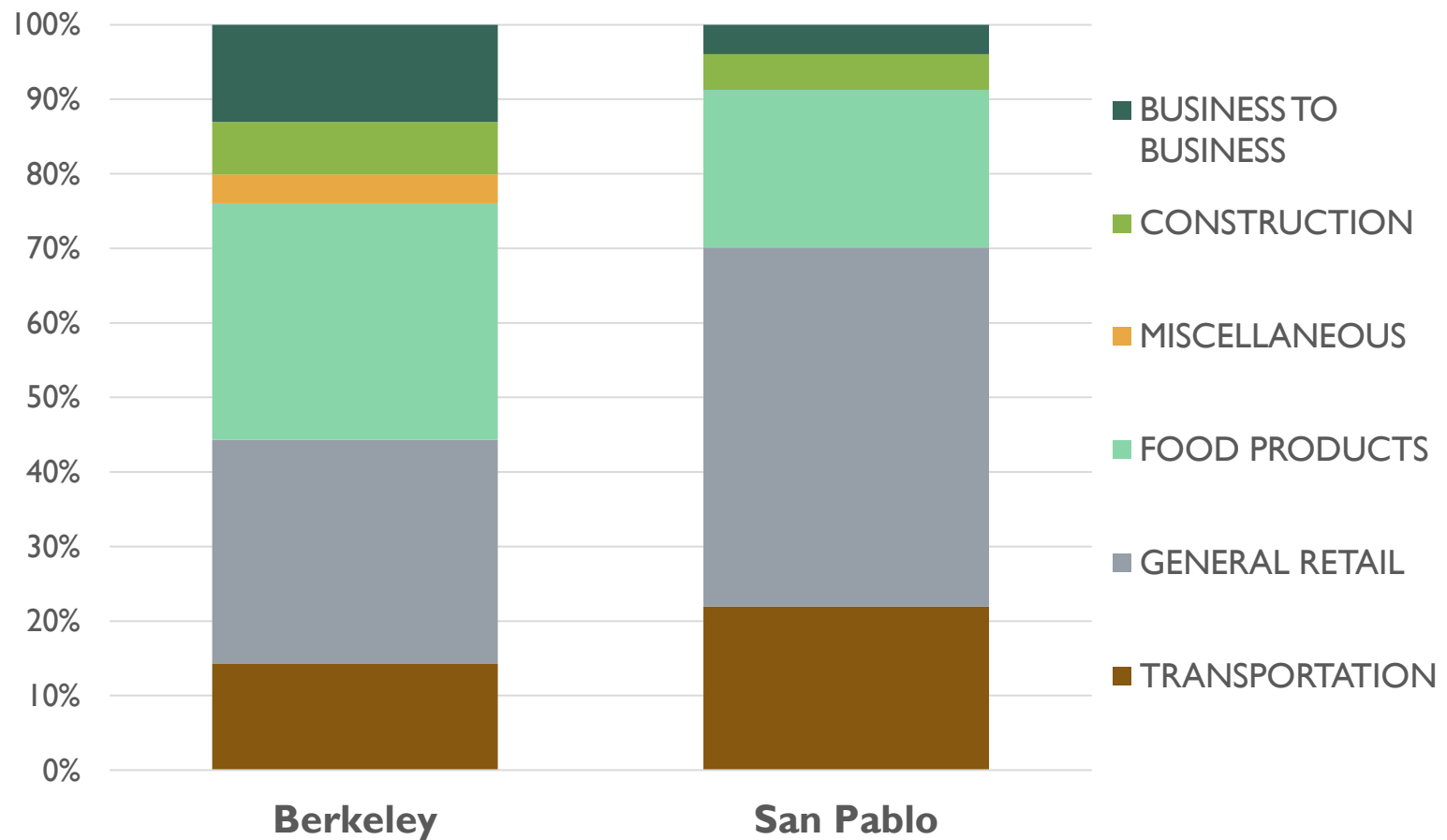


# SALES TAX PERFORMANCE OVER TIME, SAN PABLO AND CITYWIDE, 2007-2016



Source: MuniServices, OED Analysis

# SALES TAX REVENUE BY CATEGORY, SAN PABLO AND CITYWIDE, 2015 Q2 – 2016 Q1



Source: MuniServices, OED Analysis

# BUSINESS CLUSTERS: AUTO-ORIENTED BUSINESSES



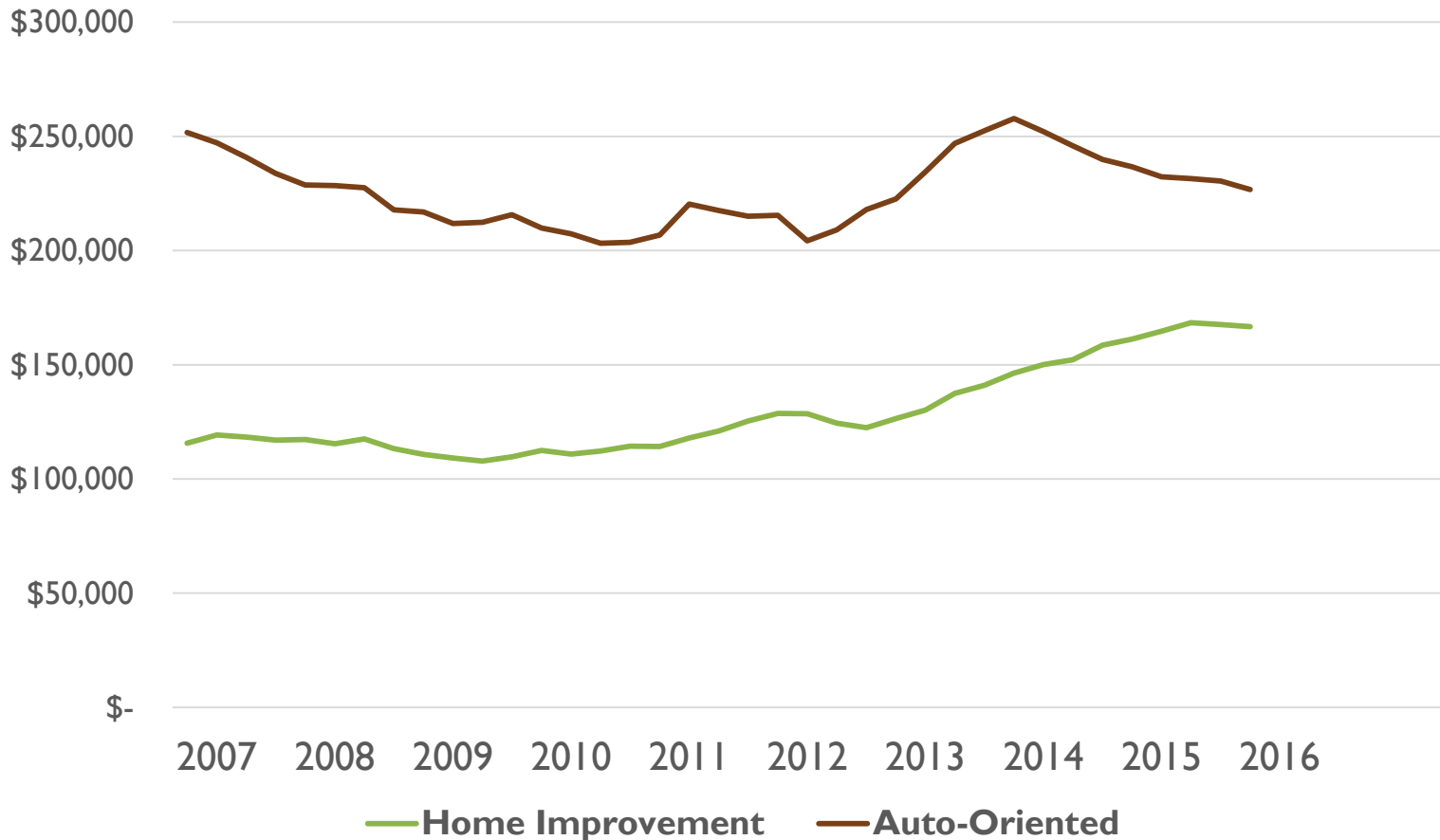


# BUSINESS CLUSTERS: HOME FURNISHINGS



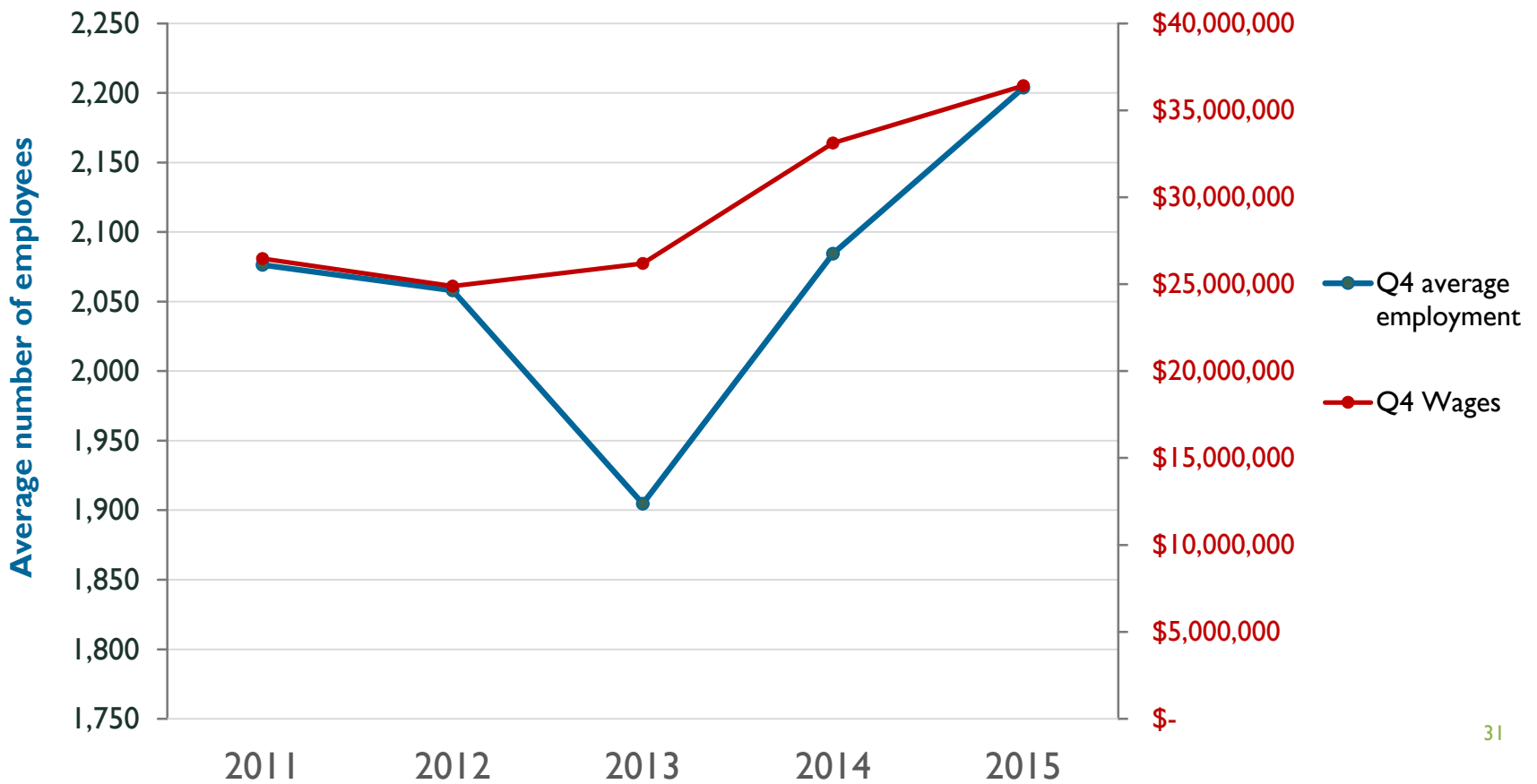


# ANNUAL SALES TAX PERFORMANCE OVER TIME, HOME IMPROVEMENT AND AUTO-ORIENTED BUSINESS CLUSTERS, 2007-2016



Source: MuniServices, OED Analysis

# WAGES AND AVERAGE EMPLOYMENT, BUSINESSES WITH SAN PABLO ADDRESSES, 2011 Q4-2015 Q4



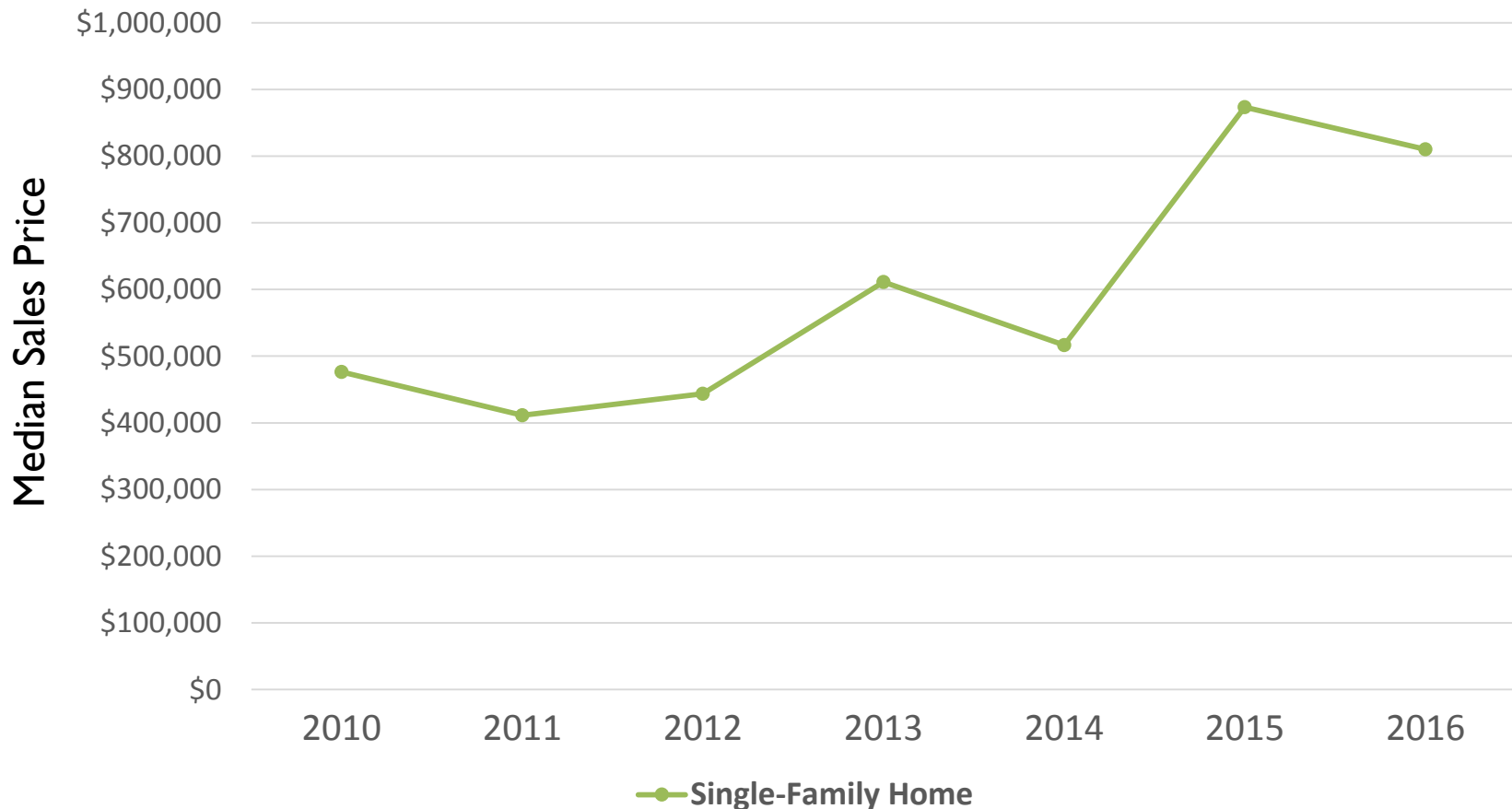
Source: Quarterly Census of Employment and Wages (QCEW), Bureau of Labor Statistics



# REAL ESTATE TRENDS

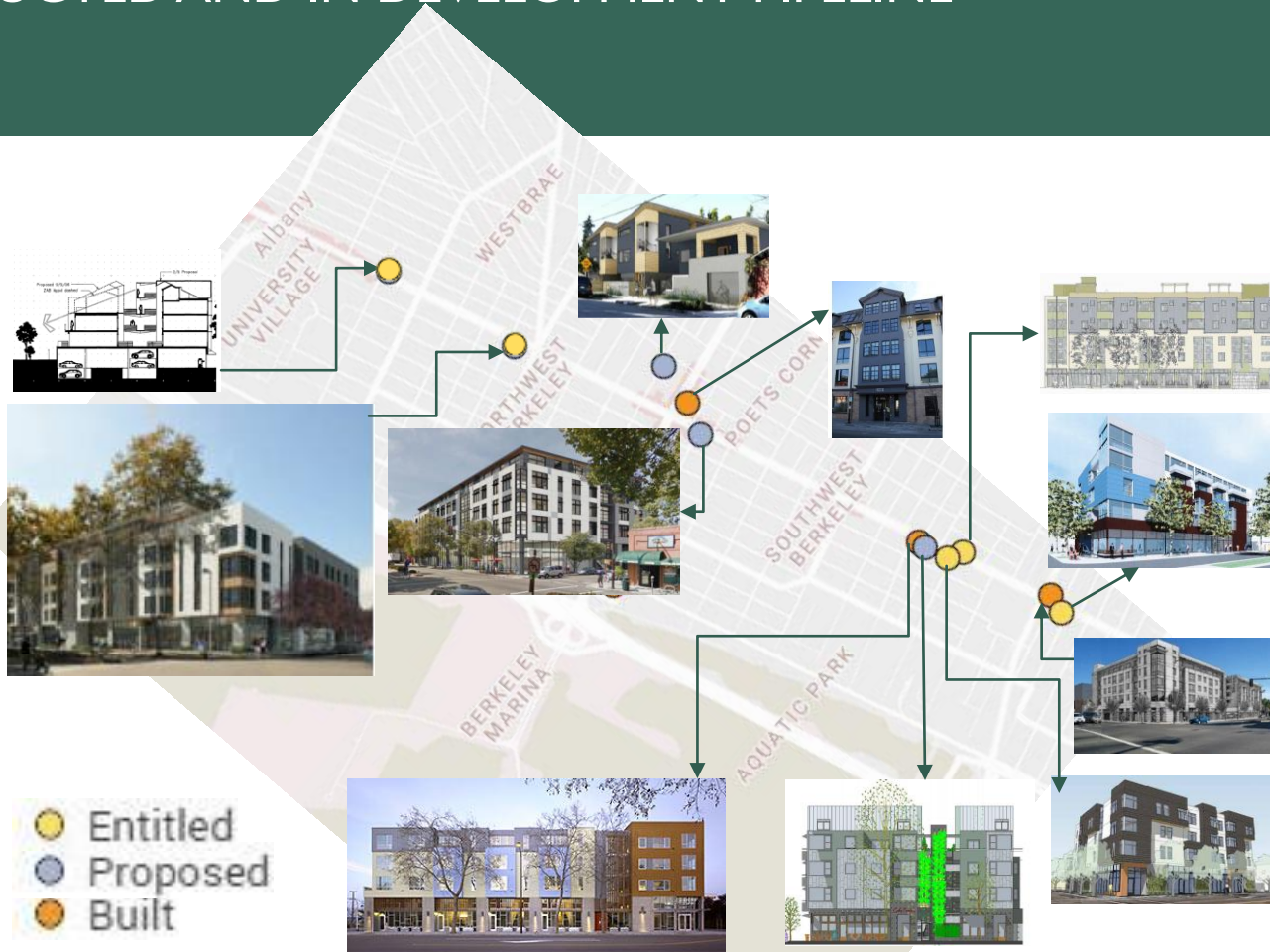


# WEST BERKELEY MEDIAN SALES PRICE OVER TIME, SINGLE-FAMILY HOMES, 2010 Q1-2016 Q3



Note: Figures are for homes west of Sacramento Street in Berkeley. The yearly medians represent the average values of the median figures for each quarter. Source: Red Oak Realty, Multiple Listing Service (MLS Data), October 2016.

# SAN PABLO AVENUE-ADJACENT HOUSING PROJECTS, RECENTLY CONSTRUCTED AND IN DEVELOPMENT PIPELINE



Source: City of Berkeley Office of Economic Development



# KEY TAKEAWAYS



# COMMUNITY ASSETS AND INITIATIVES

- San Pablo sits at intersection of production and commerce; on-site production helps drive retail
- Thriving Arts Community
- Business Groups
- Concentrations of ethnic grocers, retailers, and restaurants
- Pending pedestrian and transportation investments



**Christina Rybczynski and Lawrence Grown,  
Metro Lighting, West Berkeley Design Loop**



**Archana Horsting, Executive Director of the  
Kala Institute**



# COMMUNITY ASSETS AND INITIATIVES: PRODUCTION AND COMMERCE



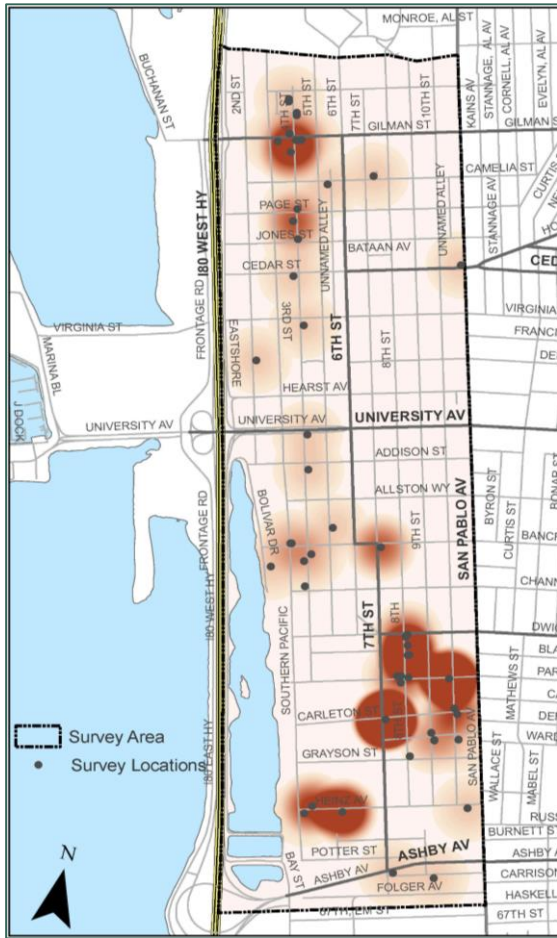
Berkeley Potters' Studio

- Home furnishings manufacturing
- Artisanal production



On-site production at Metro Lighting

# COMMUNITY ASSETS AND INITIATIVES: THRIVING ARTS COMMUNITY

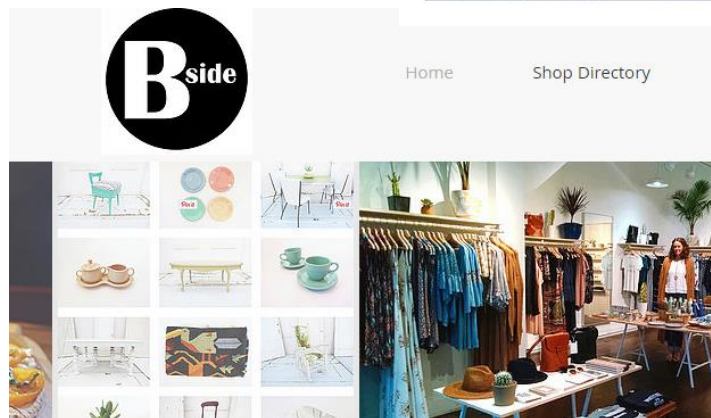
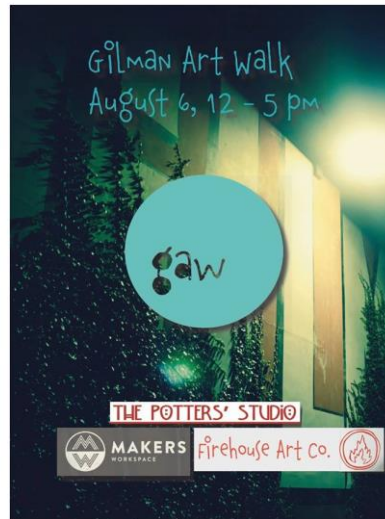


Installations from Kala Art Institute's *Print Public* Initiative





# COMMUNITY ASSETS AND INITIATIVES: BUSINESS GROUPS



# COMMUNITY ASSETS AND INITIATIVES: ETHNIC GROCERS, RETAILERS, AND RESTAURANTS



Gaumenkitzel Chef and owner Anja Voth. Photo: Suzanna Mannion



Mural at Mi Tierra Foods; Manager Ambrocio Hernandez (right), Photo: Berkeleyside



# COMMUNITY ASSETS AND INITIATIVES: PENDING TRANSPORTATION INVESTMENTS

- Alameda County Transportation Commission (Alameda CTC) has designated San Pablo Ave as a priority corridor
  - Rapid bus upgrades
  - Possible bus rapid transit corridor in long term
  - Planning to begin in Spring 2017
- I-80 Gilman Interchange project
  - Will improve vehicle, pedestrian, and bicycle operations at I-80 and Gilman
  - Construction anticipated in FY 2020-2021
- AC Transit plans to expand West Berkeley bus service beginning March 2017
- CoB has applied for \$8.6 million for Alameda CTC Transit Signal Priority program
  - Extends green lights when buses are detected approaching

# CHALLENGES

- Loss of racial and economic diversity
- Competing local and regional interests for transportation and land use
- Existing cluster of auto-oriented businesses is threatened by competing uses

# OPPORTUNITIES

- Leverage San Pablo's development potential to preserve and increase housing affordability.
- Engage with regional transportation agencies and private sector leaders to expand sustainable, multi-modal transportation.
- Pursue grant funding to conduct comprehensive land use planning for the San Pablo Priority Development Area.
- Leverage planned development and regional transportation investments to enhance the pedestrian environment.
- Promote walkable, active frontages, especially at the Nodes.
- Support existing and emerging business associations and industry clusters.



# Q & A

