

Lower Divisadero Corridor Business Attraction Survey Summer 2007

Prepared for:

Lower Divisadero Corridor Revitalization Project

Prepared by:

Business Attraction Committee (BAC)

Lower Divisadero Corridor Revitalization Project

Email: lowerdivis@nopnawiki.org

Abstract

The Lower Divisadero Corridor (LDC) business attraction survey was created to gauge the types of business resident's were interested in as well as to determine their overall thoughts about the corridor. The LDC spans from Haight street to the south, Geary street to the north and surroundings within a 0.5 mile radius of Divisadero. Survey Monkey (www.surveymonkey.com) was used to collect data in three categories: Business Types, Area Culture and Household. There were a total of 16 questions in all categories. A total of 117 respondents started the survey with 116 completing it. Results from the business types section indicate that respondents want Restaurants (both inexpensive and upscale), Bakery and Clothing/Shoes types of businesses within the corridor and don't want Medical Marijuana Dispensary, Franchise/Chain Store and Auto Repair type of businesses. Responses within the area culture section indicate that the respondents see the neighborhood as independent, crime ridden and laid back while not seeing it as Hippie, Family-oriented or Yuppie. The majority of the respondents are from household's with income over \$100k (59.3%), on average have 2.1 people in their household while 14.8% have children under 18. These household demographics are within the 2000 census data for the 94117 (64.9% of respondents) area code but on the high side when it comes to income (>\$100k was 12.9%, based on 2002 data). Respondent's also self identified themselves as professional, community focused and liberal while not identifying with hippie, conservative and student. Overall, the respondents were positive about the corridor's future and wanted to see crime reduced, the streets cleaner and businesses that support the neighborhood culture.

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Summary

Respondent's to the Lower Divisadero Corridor (LDC) survey were excited about what the corridor can become. Their general feeling is that it has a lot of potential but that the crime, dirty streets and graffiti need to be addressed. Most respondent's want the neighborhood character to remain and don't want to see the neighborhood turned into a homogeneous area.

A total of 117 respondent's started the survey with 116 completing it. The top types of businesses requested were: Clothing/Shoe store, bakery and Restaurants (both inexpensive and upscale). The types of businesses that people don't want to see are: Medical Marijuana Dispensary, Franchise/Chain Store and Auto Repair.

The majority of the respondents are from household's with income over \$100k (59.3%), on average have 2.1 people in their household while 14.8% have children under 18. These household demographics are within the 2000 census data for the 94117 (64.9% of respondents) area code but on the high side when it comes to income (>\$100k was 12.9%, based on 2002 data). Respondent's also self identified themselves as professional, community focused and liberal while not identifying with hippie, conservative and student.

Most respondent's felt that the LDC was an independent, crime ridden and laid back community that can and will pull together to make positive change. Some of the responses that best characterized how people felt were:

“It's like Sesame street with occasional semi-automatic gun battles.”

“It feels like "normal" people live here. I like the small-town feel of NOPA.”

“There is a mix of cultures in this neighborhood. It is unpretentious, up and coming, and fresh. The people in this neighborhood care and are outspoken.”

Any business that wants to setup in the LDC should consider the community focused nature of the area. The majority of the respondent's were in neighborhood associations like NOPNA, Lower Haight and ASNA. These organizations are active in the area and seem to have a strong say in what does on.

Next steps for the Business Attraction Committee will be to take the data gathered by this survey and actively pursue the types of businesses the respondent's requested. Once candidate businesses are attracted, additional surveys and emails will be produced to gage neighbors feelings about the proposed businesses.

Scope

1 *Purpose*

This survey was commissioned by the Business Attraction Committee to gage resident's feelings on the type of businesses they would like in the area as well as their general impressions about the area. The collected data and analysis will be used to attract businesses to the Lower Divisadero Corridor (LDC).

2 **References**

- Census data for 94117:
http://www.dataplace.org/area_overview/index.html?place=x108448&z=1
- San Francisco City Survey (2007):
<http://www.nopnawiki.org/images/5/54/2007CitySurvey.pdf>
- Harding Theater Survey (Feb. 2005):
http://www.nopnawiki.org/images/a/a3/Harding_survey_results.pdf
- LDC Survey PDF (http://www.nopnawiki.org/images/a/ad/Lower_Divis_Survey.pdf)

3 **Definitions**

Lower Divisadero Corridor (LDC): The stretch of Divisadero that runs from Geary to Haight and surroundings out to a ~ 0.5 mile radius.

Methodology

1 **Response gathering**

Survey Monkey (www.surveymonkey.com) was used to gather responses from people. A link to the survey

(http://www.surveymonkey.com/s.aspx?sm=XKB_2b_2fILq7gAKdwTewdcu7w_3d_3d) was sent to various e-mailing lists including:

- Lower Divisadero Neighborhood Group (lowerhaightorg@googlegroups.com)
- PRO-SF (home@pro-sf.org)
- North Panhandle Neighborhood Association (nopna_board@yahoogroups.com)
- Alamo Plaza Neighborhood Association (via a flyer and e-mail)
- Craigslist General Community (Western Addition Section)
- SF5Together yahoo group list (5Together@yahoogroups.com)
- Placed on www.nopnawiki.org and www.nopna.org

Emails were also sent out to friends and neighbors of the BAC.

2 **Question selection and construction**

Questions were selected to gauge peoples desires as to the type of businesses that they want on the LDC as well as what their feelings are as to the character of the neighborhood. Additional questions were added to determine what should be done with The Harding Theater site as well as some demographic questions to compare to census data. See the appendix for a complete list of questions.

Some of the questions also contained selections that were meant to determine if the responses were truthful as well as to gauge what people don't want in the neighborhood. Free form responses were also include to get feedback on the survey and what people wanted fixed around the LDC.

The questions were put into three categories: Business Types, Area Culture and Household. All multiple choice questions were randomized to prevent random clicking of answers and most questions had an other response to fill in.

Business Types:

The business types section was used to determine the types of businesses people frequently travel outside the area to go to and which ones they would like in the LDC. A free form question was also presented that asked the respondent to list the top three types of businesses that they would like.

The thinking behind the travel outside the area and the which businesses they want was to see if they correlated and to jointly weigh both responses to get an accurate picture of not only what people want but what people will go to. The free form part was also meant to achieve the same correlation. The free form section also allowed respondent's to enter in specific business names that they might want.

In addition to the types of businesses that residents would like, a question about what residents would like to see done to The Harding Theater site. This was included because it a large site that is right in the middle of the LDC and there has been some efforts to preserve the building as a theater (see the 2005 Harding Survey for more details)

Area Culture

This set of questions was used to determine how people felt about the LDC and how they see themselves. Any business that is attracted to the LDC needs to be aware of the local culture as well as the culture of the residents. In addition, two other question were asked to determine what people like and dislike about the LDC.

Household

The household section asks questions about the demographics of the respondent. It will be used to correlate to census data as well as to understand the types of people that have responded to the survey. It also contains a question related to neighborhood associations and if the respondent belongs to one.

The last set of questions in this section ask for open ended comments as well as an email address for any updates on the LDC.

Results and Analysis

1 Overview

The survey was open for responses starting 7/14/2007 and was closed on 08/20/2007. There was a total of 117 started surveys and 116 of those were finished.

Demographic comparisons will be done based on the census data from the 94117 zip code (other zip codes responded but this one was the biggest responding group). All data is taken from the 2000 census unless otherwise stated. The relevant data to compare to is listed below:

General Information

Item	Units	Value
Total Population	people	38,168
Population Density	people/sq-mile	27,158.515
Population under 18	%	6.5
Total Households	N/A	18,025
Average household size	people	2
Households with children	%	25.5
Median Household Income	\$	63,983
Average Household Income	\$	85,314
Total number of establishments (2003)	#	732
Establishment density	per 1000 population	19

Area Income

Item (2002 Data)	Units	Value
Average Adjusted Gross Income	\$	62,743
<\$10,000	%	13.3
\$10,000-\$19,999	%	13.3
\$20,000-\$29,999	%	13
\$30,000-\$49,999	%	23.5
\$50,000-\$99,999	%	24.1
>\$100,000	%	12.9

City Survey Results

Each year, the City and County of San Francisco's Office of the Controller, City Services Auditor does a City Survey to gauge San Francisco resident's thoughts and feelings. The survey asks several quality of life related questions that are reported by district. The relevant data to compare to is presented below:

Chapter 2: Safety (Page 2-1)

- Feelings of Safety was stable from 2005 and higher than in the 1990's
- Fifty-seven (57%) of residents feel safe both day and night
 - Appendix A-4: District 5 reports 47% of respondents feel safe both day and night.
- Eighty (80%) of respondents report feeling safe or very safe walking alone in their neighborhoods during the daytime, down from 83 percent in 2005.

- Appendix A-3: District 5 reports 82% of respondents feel safe or very safe walking along during the day in their neighborhood.
- Appendix A-3: District 5 reports 50% of respondents feel safe or very safe walking alone during the night in their neighborhood.

Chapter 4: Streets and Sidewalks (Page 4-1)

- Steady grades for street and sidewalk cleanliness from 2005.
- Forty-nine (49%) percent of respondents consider the cleanliness of their neighborhood streets as good or excellent
 - Appendix A-9: District 5 reports 37% of respondents consider the cleanliness of their neighborhood sidewalks as good or excellent.
 - Appendix A-10: District 5 reports 44% of respondents consider the cleanliness of their neighborhood streets as good or excellent.
 - Appendix A-11: District 5 reports 35% of respondents consider the pavement conditions of their neighborhood streets as good or excellent.
- Forty-five (45%) of San Franciscans think that the cleanliness of their neighborhood sidewalks are in good or excellent condition.
- The average ratings in Districts 1,2,3,4,5,7 and 8 are significantly lower in 2007 than in 2004 and 2005. There is a dramatic drop in District 2 and 7.

Chapter 10: Demographic Information (Page 10-2 and 10-4)

- What was your household's total income before taxes in 2004?

Item	Units	Value
<\$10,000	%	7
\$10,000-\$24,999	%	12
\$25,000-\$49,999	%	19
\$50,000-\$99,999	%	30
>\$100,000	%	32

- How many people live in your household/Any children under 18?

Item	Units	Value
One	%	33
Two	%	37
Three	%	15
Four	%	10
Five or more	%	6
Children under 18	%	20

Chapter 9: Technology and San Franciscans (Page 9-1 to 9-10)

- Eighty-two (82%) of the population uses a computer at home and 80% of those use it to access the Internet
 - Appendix A-22: District 5 reports 86% of respondents reach the Internet from home.

- Percent of Internet in the Home versus Income

Item (2006 Income)	Units	Appox. Value
<\$10,000	%	35
\$10,000-\$24,999	%	65
\$25,000-\$49,999	%	80
\$50,000-\$99,999	%	90
>\$100,000	%	99

2 Results and Analysis

..2.1 Business Types

There were a total of five questions in this section. Three had to do with types of businesses desired, one dealt with walking versus driving to businesses and the last one dealt with the Harding Theater property. The Harding Theater question was posted because it has been in limbo for quite a while and it is a major store front on the LDC.

Three questions were posed to respondents to determine the types of businesses that they want on the LDC. Two of the questions were selection from a list while the other was to list your top three businesses. The exact wording of the questions follows:

Question 1: How often do you travel outside of the Lower Divisadero to go to these businesses (greater than a mile away)?

Question 2: Please rank the following types of businesses you would like to see on Lower Divisadero

Question 3: Please list your top 3 businesses that you would like to see in the Lower Divisadero. You can indicate a specific business by name, or by category/type.

The methodology to determine the actual business wants of the respondents was to determine the commonality between the three questions. It was felt that the businesses that people travel outside their neighborhood for are more valuable than ones that they might potentially want. The top three list was to narrow down the list more and to correlate to the other two lists. In addition to a wants, we also wanted to determine what the respondent's don't want by including selection items that we deemed unpleasant to the respondent's

The results of the comparisons is presented below:

Type	Question 1	Question 2	Average
Clothing/Shoes	1.68	2.06	1.87
Bakery	2.44	1.76	2.1
Upscale Restaurant	2.29	2.05	2.17
Ice cream shop	2.61	2.18	2.4
Inexpensive Restaurant	2.88	1.91	2.4
Gym	2.36	2.5	2.43
Florist	2.65	2.29	2.47
Dessert Cafe	2.91	2.09	2.5
Grocery Store	2.7	2.59	2.65
Sporting goods	2.33	2.96	2.65
Office Supply/Stationary	2.45	2.97	2.71
Novelty/Gift	2.63	2.83	2.73
Pharmacy	2.84	2.7	2.77
Bar/Club	3.04	2.72	2.88
Coffee Shop	3.29	2.55	2.92
Children's Store	3.56	3.15	3.36
Auto Repair	2.91	3.96	3.44
Franchise Store	2.86	4.06	3.46
Large Chain Store	2.69	4.47	3.58
Discount Store	3.45	4.14	3.8
Medical Marijuana Dispensary	4.79	4.53	4.66

The list above is in ranked order based on the average of the two questions. The interesting thing about the responses is that what people want and what they travel out of the neighborhood for can be quite different. This might indicate the frequency of which the respondent's go to these types of businesses or they might frequent them more if they were closer.

Question three results are presented below:

Type	1	2	3	Avg	Count	Weighted Avg
Inexpensive Restaurant	19	19	10	1.81	48	1.70
Bookstore	12	26	3	1.78	41	1.95
Bakery	14	8	9	1.84	31	2.67
Upscale Restaurant	10	13	4	1.78	27	2.96
Grocery Store	13	7	6	1.73	26	3.00
Gym	12	3	11	1.96	26	3.39
Clothing/Shoes	7	9	12	2.18	28	3.50
Movie Theater	3	7	4	2.07	14	6.66
Ice cream shop	4	5	3	1.92	12	7.19
Bar/Club	2	7	3	2.08	12	7.81
Florist	2	4	5	2.27	11	9.30
Pharmacy	1	7	2	2.10	10	9.45
Children's Store	1	4	1	2.00	6	15.00
Dessert Cafe	1	4	1	2.00	6	15.00
Coffee Shop	2	0	5	2.43	7	15.61
Novelty/Gift	1	1	5	2.57	7	16.53
Large Chain Store	1	1	1	2.00	3	30.00
Sporting goods	0	1	1	2.50	2	56.25
Discount Store	0	1	0	2.00	1	90.00
Office Supply/Stationary	0	0	1	3.00	1	135.00
Auto Repair	0	0	1	3.00	1	135.00
Medical Marijuana Dispensary	0	0	0	5.00	1	225.00
Franchise Store	0	0	0	5.00	1	225.00

These results also include the write in results from the wants and travel question. The top three were given weights of 1, 2 and 3 to correspond to questions 1 and 2. The weighted average is the average response of all three rankings with the additional weight of total responses for that item. As can be seen, the responses are a little different than question 1 and 2. To determine the actual business like and dislikes, we compare the top and bottom of the lists as follows:

Top 7, list 1	Top 7, list 2
Clothing/Shoes	Inexpensive Restaurant
Bakery	Bookstore
Upscale Restaurant	Bakery
Ice cream shop	Upscale Restaurant
Inexpensive Restaurant	Grocery Store
Gym	Gym
Florist	Clothing/Shoes

Looking at what is in list 1 and in list 2, we find that the common types of businesses between them are:

- Inexpensive Restaurant
- Bakery
- Upscale Restaurant
- Clothing/Shoes
- Gym

Respondent's also put in specific names for businesses. The names they put in were:

- Plutos restaurant
- 24 Hour fitness
- Arizmendi bakery
- Golds Gym
- Noah's Bagels
- Trader Joe's
- Bay Bread
- Mitchell's Ice Cream
- Whole Food's
- Kinkos
- Great Harvest Bakery
- Goodwill/Thrift Village
- Cliff's Hardware Store (Castro)

The bottom businesses on both list 1 and 2 were as follows:

Bottom 7, list 1	Bottom 7, list 2
Coffee Shop	Large Chain Store
Children's Store	Sporting goods
Auto Repair	Discount Store
Franchise Store	Office Supply/Stationary
Large Chain Store	Auto Repair
Discount Store	Medical Marijuana Dispensary
Medical Marijuana Dispensary	Franchise Store

These two lists are also different but share the following in common:

- Medical Marijuana Dispensary
- Discount/Franchise/Chain Store
- Auto Repair

Any business that is of these types will have a hard time getting neighborhood support and will be avoided by the business attraction committee.

The next question dealt with traveling to desired businesses. The exact question text is as follows:

Question 4: If the business you indicated above were in the Lower Divisadero neighborhood, what is the probability that you would walk there?

The overwhelming response was that they would. Over 94% of respondent's said they were very likely to walk to the desired businesses.

The last question in this section had to deal with the Harding Theater. The Harding used to be a theater and now has fallen into disrepair. A 2005 survey about the desired fate of the Harding revealed that people wanted it to be saved and restored.

The question in this survey asked respondent's to list in order of preference their desired outcome for the site. Respondent's also had a section to put their comments. The question was as follows(the results follow):

Question 5: Please rank what you feel would be the best useage for the Harding Theater Site (at Divisadero at Hayes). (Please keep in mind that the theater is privately owned. Your suggestions provide guidance but do not necessarily determine its ultimate best usage.)

Item	Avg
Restored into a theater and condos	2.19
Restored as a theater	2.22
Torn down and made into mixed use condos and businesses	3.38
Restored into a Community Center	3.54
Torn down and made into a business plaza	4.43
Torn down and made into condos	4.73

Clearly, the respondent's want to see the theater restored but there is a strong feeling that it needs to be mixed use since that seems to be the best way to ensure that it will not fall into disrepair again. The comments seem to point that way as well. Out of the 115 respondent's, 30 added comments. A select number of them are reproduced below (for a complete list, see the raw data file).

“Just do SOMETHING with it!!!! Except put in a bunch of chain stores.”

“If a theater, best not a movie theater--single-screens don't do well, and anyway the Red Vic and the Sundance are nearby for indie fare. Much better would be a venue for live music or performances.”

“We need to be sensitive to economic realities. A self-sustaining community center is not feasible. Condos are a good thing for the neighborhood: increases the tax base and adds lots of customers to the shops/restaurants plus increased vitality to the sidewalks. Street level must be businesses, not driveways.”

“I don't want to see just expensive housing, nor 100% affordable. Should be mixed-income housing, if condos are built. But ideally the building would be a community center, or a mixed-used development.”

“Enough already with the protecting "historical landmarks." That thing is an eye sore and the sooner it gets turned into something useful the better for the neighborhood. Some "activists" need to get a life and stop living in the past.”

In general, the comments lean toward a mixed use development. It does seem that people want something done with the site since it has been vacant for a long time. The owner should consider some sort of mixed use project that keeps the theater aspect of the site.

..2.2 Area Culture

Four questions dealt with area culture. The driving force behind these questions was to determine how the respondent's felt about the neighborhood and how they would describe it. There were also free form questions that asked respondent's about the things they liked and disliked.

The first two questions dealt with how they thought about the neighborhood and how the identified themselves. Both questions are listed below:

Question 6: When you think of the community around the Lower Divisadero, which words/phrases come to mind (click all that apply)

Question 7: How would you describe yourself (please click all that apply)?

The responses to question 6 are summarized below (in ranked order):

Response	%
Independent	65.2
Crime ridden	52.2
Laid Back	49.6
Hipster	47.8
Bike culture	31.3
Community focused	30.4
Dog-Oriented	28.7
Art & Music	21.7
Old school	19.1
Other	14.8
Yuppie	13.0
College Vibe	13.0
Family-Oriented	12.2
Hippie	9.6
Diverse	5.2

These results show that the respondent's see the neighborhood as Independent, Crime ridden and Laid Back. The last entry, Diverse, was the most typed in response in the Other Category.

When respondent's answered questions about how they saw themselves, the majority of them saw themselves as Professional, Community-focused and Liberal (see the results below).

Response	%
Professional	75.0
Community-focused	54.3
Liberal	50.0
Independent	48.3
Green	48.3
Progressive	44.8
Moderate	24.1
Artist	24.1
Outspoken	17.2
Parent	16.4
Yuppie	14.7
Other	12.9
Hipster	9.5
Student	5.2
Musician	5.2
Conservative	1.7
Hippie	1.7

This implies that any business that is attracted to the LDC, needs to keep in mind these results so that the business will be successful.

The next set of questions were fill in the blank and focused what people like about the LDC and what they would change. The questions are reproduced below:

Question 8: What do you think are some of the best features of our neighborhood?

Question 9: What are the top two things you would change about our neighborhood?

Several general themes emerged from the analysis of question 8 and 9. Respondent's had a lot to say about what they like and dislike. On the like side, the responses tended to follow these themes (in no particular order):

- Diversity of all kinds
- Location (Central)
- Access to parks
- Community Spirit/Neighborhood feel
- Independent
- Up and coming with great independent businesses

A lot of the comments had specific names of independent businesses that they thought were great. A select list of comments are reproduced below. These were the comments that seemed to sum up the other comments nicely.

"It's like Sesame street with occasional semi-automatic gun battles."

"It feels like "normal" people live here. I like the small-town feel of NOPA."

"NOT overridden with chain stores. Central location. Diversity of people."

"Walkability, many transit options, great architecture, good restaurants, close to parks"

"There is a mix of cultures in this neighborhood. It is unpretentious, up and coming, and fresh. The people in this neighborhood care and are outspoken."

"diverse population independent character neighborhood activism central location"

On the dislike/improvement side, the responses tended to follow these themes:

- Crime/Violence
- Empty store fronts
- Medical Marijuana Dispensaries
- Dirty streets, poor conditions of streets/side walks and graffiti
- Need more parking
- Lack of green on LDC.

A select list of comments are reproduced below. These were the comments that seemed to sum up the other comments nicely.

“I want lots of great places to eat at in the neighborhood. I want more small cool shops I can walk to.”

“Fill vacant shops. Work on getting/keeping the street a cleaner, including the preventing and removing of graffiti and street trash and planting streetscapes.”

“The street needs cleaning up, there are storefronts that look desolate and grimey. If trees were planted along the sidewalk, a sense of place could be established and would be a welcome to walkers who like to browse and windowshop.”

“Stop gang violence. clean up the appearance including graffiti and tattered store awnings. more trees. bring in more useful businesses, like a gym, clothing/shoe stores, running store, pet store.”

“While I think this neighborhood is getting better, I remain concerned about the large amount of crime that goes on. When I've lost count of the number of murders that have occurred within 8 blocks of my house, there's a serious problem that needs to be addressed.”

“1) Paint all of the shops and buildings along Divisadero 2) Green the median of Divisadero 3) Fill in the empty stores with gift shops and restaurants and clothing stores”

..2.3 Household

The remaining section dealt with demographic data as well as asking for any comments about the LDC. The first question (question 10) in the series asked respondent's their cross street and their area code. This data was used to determine the respondent's proximity to Divisadero as well as to select which census data to use for comparisons. The map of respondent's is presented below:

Cross Street	Stanvan	Cole	Clayton	Ashbury	Masonic	Central	Lyon	Baker	Broderick	Divisadero	Scott	Pierce	Steiner	Fillmore	Webster	Laguna	Gough
Geary	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
O'Farrell	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0
Ellis	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Eddy	0	0	0	0	0	0	0	0	0	5	0	0	0	0	0	0	0
Turk	0	0	0	0	0	3	0	0	1	1	0	0	0	0	0	0	0
Golden Gate	0	0	0	0	0	3	0	2	1	3	0	0	0	0	0	0	0
McAllister	0	0	0	0	0	3	1	3	1	6	0	1	0	0	0	0	0
Fulton	1	0	0	0	2	4	1	3	0	2	1	3	1	1	0	0	0
Grove	0	1	0	1	0	0	3	4	0	1	0	0	0	0	0	0	0
Hayes	0	0	0	0	0	1	1	5	4	4	1	0	0	0	0	0	0
Fell	0	0	0	0	0	0	1	1	1	1	3	0	1	1	0	0	0
Oak	0	0	0	0	0	0	0	0	1	2	3	0	0	1	0	0	0
Page	0	0	0	0	0	0	0	0	0	0	4	0	2	0	1	0	0
Haight	0	0	0	1	0	0	0	0	0	1	0	0	1	1	0	0	0
Waller	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
Germania	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hermann	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0

The black box represents the LDC area. As can be seen from the plot, the majority of the respondent's live within the LDC area with most respondent's on the West side of Divisadero. A large number of respondent's, 64.9%, were from the 94117 area code while 28.3% were from the 94115 area code. Two other area codes were reported as well, 94114 (1 response) and 94118 (6 responses). For simplicity, all census data will be taken from 94117 and any City Survey data will be taken from the District 5 breakout.

The next two questions (Questions 11 and 12) asked respondent's how many people are in their household as well as how many people under 18 are living there. The results are presented below as well as comparisons to other demographic data.

Item	Units	LDC Survey	Census/City Survey
Persons in household	people	2.1	2.0 (census)
Children under 18	%	14.8	25.5/20

Comparing the LDC survey to the Census/City Survey, it appears that the LDC respondent's are representative of the resident's that live in the 94117 area code.

Question 13 asked respondent's to select which neighborhood associations they belong to. This was done to figure out how active people are in the community as well as to determine where potential businesses should go to get community buy in. The results are presented below:

Association	%
North Panhandle Neighborhood Association (NOPNA)	72.4
Lower Haight Neighborhood Group (lowerhaight.org)	22.4
Alamo Square Neighborhood Association (ASNA)	9.2
Other (please specify)	7.9
Haight Divisadero Neighborhood Merchants Association	5.3
SF5Together	2.6
Panhandle Residents Organization Stanyan Fulton (PRO-SF)	1.3
D5Dog	1.3
Haight Ashbury Neighborhood Council (HANC)	1.3

An overwhelming majority of people belong to NOPNA that responded to this survey followed by Lower Haight. Any businesses that wants/needs LDC input from neighbors should talk to these groups.

Question 14 asked respondent's to report their household income level. This data was taken so that a comparison could be made to both the census data and the City Survey Data.

Item	Units	LDC Survey	Census/City Survey
< \$25,000	%	0.9	7 (City Survey)
\$25,000 - \$49,000	%	7.1	12 (City Survey)
\$50,000 - \$74,000	%	14.2	19 (City Survey)
\$75,000 - \$99,000	%	10.6	30 (City Survey)
>\$100,000	%	59.3	32 (City Survey)
Average household income	k\$	N/A	85.3 (Census)

This data suggests that the respondents are on the high side for income but if you look at the total % for >\$75K compared to <\$75k, you see that it is mostly in line with the demographic data but still skewed to the high side.

Question 15 asked for any general comments on how respondent's would improve the LDC while question 16 asked for email addresses. The responses to question 15 were generally positive in terms of wanting something to happen. The main themes were as follows:

- Love the neighborhood and want to see it improve.
- Keep the uniqueness and character
- No chain stores. Independent businesses are what we need
- Respect the history of the neighborhood and reach out to all
- Make the place look better: more trees, cleaner streets and less run down/graffiti storefronts.

A select list of quotes from respondent's is presented below. There were a lot of variety in the responses but these seemed to sum things up nicely:

“It's about time!”

“When I see my neighbors we wave, it's a nice place to live. But for some reason, when outsiders come to our area they feel compelled to act like thugs and bums. Yuppies puke, drug dealers kill, cyclists give you the finger as the blow stop signs, drivers glare at you should you put a toe in a crosswalk. Sigh. I guess I want businesses that will bring nicer folk to our little corner of the city. No more bars/pot/skateboard/late night pizza joints, please.”

“Please continue funding the Divisadero corridor street cleaning program”

“This is much needed. This is a great neighborhood, but it has recently taken a step backwards in terms of appearance and safety.”

“We need this! Improving the main corridor, adding lights, benches, making it friendlier, will all help cut down on crime.”

“It needs to go all the way to Geary, not stop at Turk. There is a real chance here to make lasting change and improvement to this neighborhood and regenerate the area in a positive way. There are many Businesses and residences between Geary and Turk on Divisadero Street.”

..2.4 Conclusions

It is clear from the survey that respondent's want improvements to the LDC but still want the neighborhood character to remain the same. Any businesses that want to come into the LDC need to be aware of the strong preference for independently owned small businesses that are unique and want to be part of the community.

Appendix

1 List of Questions

1. How often do you travel outside of the Lower Divisadero to go to these businesses (greater than a mile away)?

	Always	Frequently	About Equal	Rarely	Never/ Don't Frequent
Gym	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clothing/Shoes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Upscale Restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sporting goods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bar/Club	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dessert cafe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ice cream shop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Novelty/Gift	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children's store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inexpensive Restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bakery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pharmacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Large Chain Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Office Supply/Stationary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Franchise Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coffee shop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical Marijuana Dispensary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Florist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grocery Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Auto Repair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discount Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

2. Please rank the following types of businesses you would like to see on Lower Divisadero

	Most Desirable				Least Desirable
Dessert cafe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gym	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Large Chain Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bakery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Auto Repair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children's store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Florist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Upscale Restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coffee shop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discount Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sporting goods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pharmacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical Marijuana Dispensary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bar/Club	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grocery Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Franchise Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clothing/Shoes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Office Supply/Stationary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Novelty/Gift Shop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inexpensive Restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ice cream shop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

3. Please list your top 3 businesses that you would like to see in the Lower Divisadero. You can indicate a specific business by name, or by category/type.

Choice 1

Choice 2

Choice 3

4. If the business you indicated above were in the Lower Divisadero neighborhood, what is the probability that you would walk there?

- Very
- Somewhat
- Not much
- Not at all

5. Please rank what you feel would be the best useage for the Harding Theater Site (at Divisadero at Hayes). (Please keep in mind that the theater is privately owned. Your suggestions provide guidance but do not necessarily determine its ultimate best usage.)

	Most desirable choice					Least desirable choice
Torn down and made into mixed use condos and businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restored as a theater	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Torn down and made into a business plaza	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Torn down and made into condos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restored into a theater and condos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restored into a Community Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

6. When you think of the community around the Lower Divisadero, which words/phrases come to mind (click all that apply)

- Bike culture
- Old School
- College vibe
- Art & Music
- Independent
- Community focused
- Family-Oriented
- Dog-Oriented
- Yuppie
- Crime ridden
- Laid Back
- Hipster
- Hippie
- Other (please specify)

7. How would you describe yourself (please click all that apply)?

- Artist
- Community-focused
- Conservative
- Green
- Hippie
- Hipster
- Independent
- Liberal
- Moderate
- Musician
- Outspoken
- Parent
- Professional
- Progressive
- Student
- Yuppie
- Other (please specify)

8. What do you think are some of the best features of our neighborhood?

9. What are the top two things you would change about our neighborhood?

10. What is the nearest cross street to where you live as well as your zip code? (example Baker, Hayes, 94117)

Street 1	<input type="text"/>
Street 2	<input type="text"/>
Zip Code	<input type="text"/>

11. Including yourself, how many people live in your household (including children)?

12. How many children under 18 live in your household?

13. Which Neighborhood Associations do you belong to? Please check all that apply.

- D5Dog
- North Panhandle Neighborhood Association (NOPNA)
- Panhandle Residents Organization Stanyan Fulton (PRO-SF)
- Haight Ashbury Neighborhood Council (HANC)
- Alamo Square Neighborhood Association (ASNA)
- Lower Haight Neighborhood Group (lowerhaight.org)
- Haight Divisadero Neighborhood Merchants Association
- SF5Together
- Other (please specify)

14. What is your average household income?

- < \$25,000
- \$25,000 - \$49,000
- \$50,000 - \$74,000
- \$75,000 - \$99,000
- >\$100,000
- N/A

15. Please add any comments you might have regarding the Lower Divisadero improvement effort.

16. For updates and community action opportunities, please provide your email address.

2 Survey Files

The raw survey data can be downloaded (in Excel format) from here:

http://www.nopnawiki.org/images/3/3d/Ldc_survey_raw_data.xls

Some of the data was removed from the data set because of its sensitive nature (i.e. IP and email addresses, etc.).

A summary of the results directly from Survey Monkey can be found at the link below:

http://www.nopnawiki.org/images/7/73/Lower_divis_biz_survey_summary.pdf

The blank survey can be downloaded from the link below:

http://www.nopnawiki.org/images/a/ad/Lower_Divis_Survey.pdf