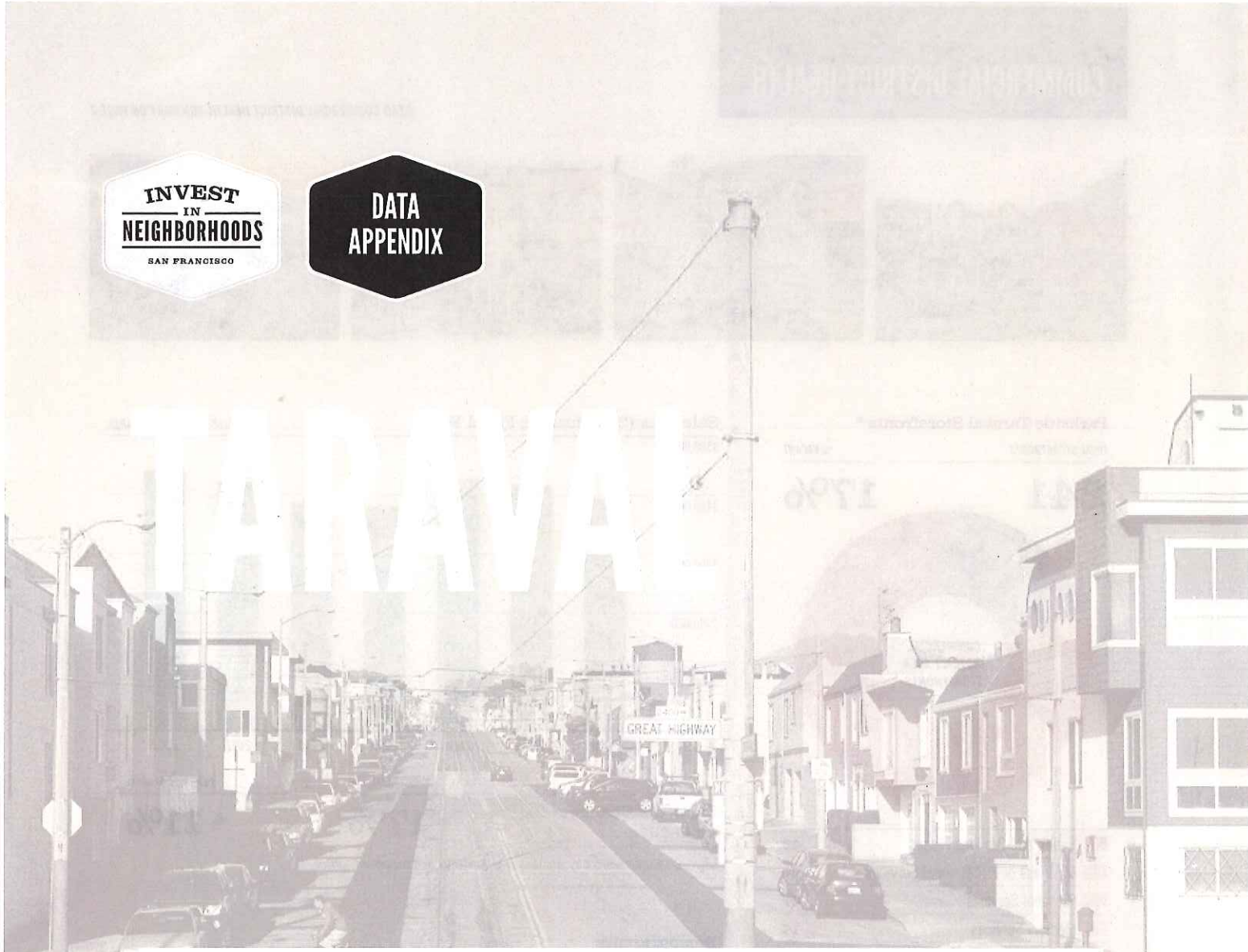
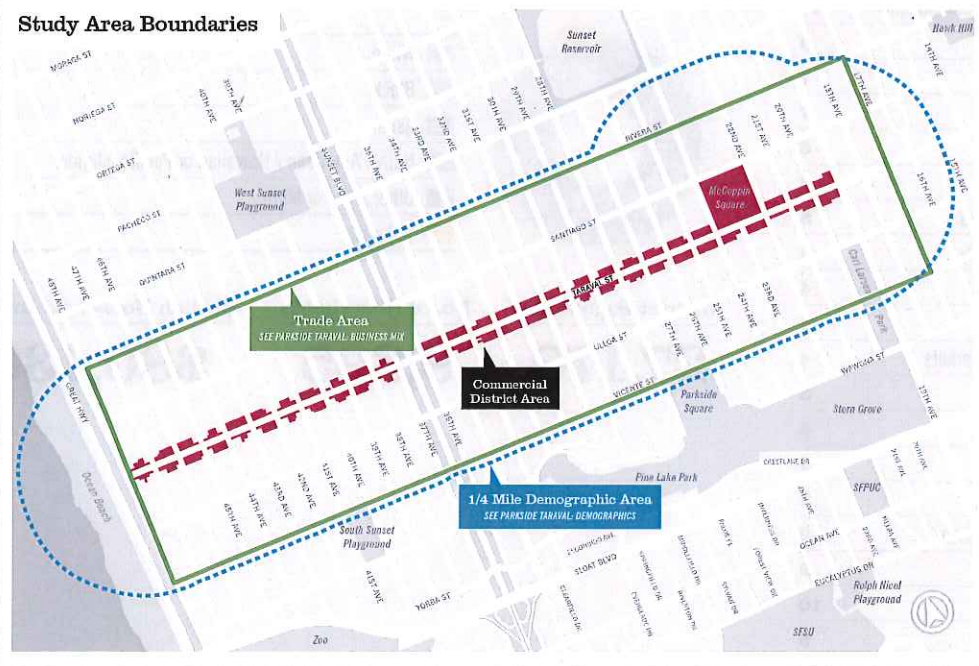




TARAVAL



Study Area Boundaries



NOTE:

Demographic data presented on page 7 represents the area within 1/4 mile of the Parkside Taraval commercial district.

Business mix data presented on page 9 corresponds with the Trade Area indicated on the map.

htTaraval storefronts data presented on page 4 corresponds with the Commercial District Area indicated on the map.

COMMERCIAL DISTRICT HEALTH

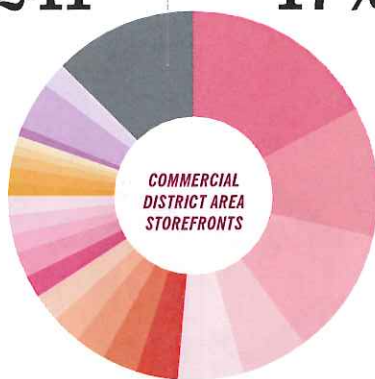
READ COMMERCIAL DISTRICT HEALTH SUMMARY ON PAGE 2



Parkside Taraval Storefronts *

TOTAL STOREFRONTS % VACANT

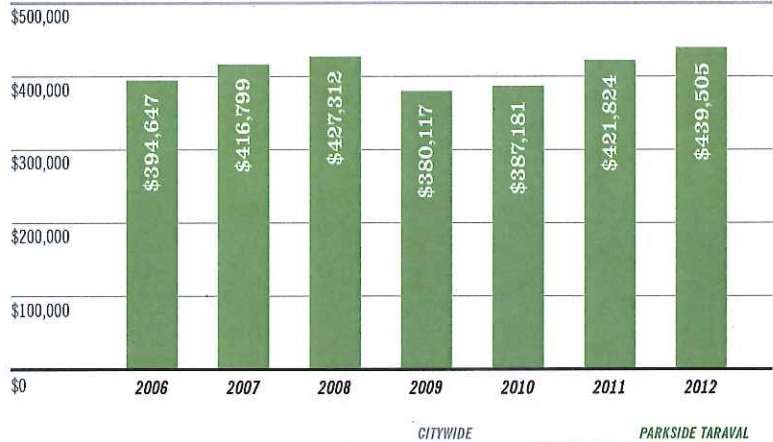
241 **17%**



| Category | Count |
|-------------------------------------|-------|
| Eating and Drinking Places | 42 |
| Business or Professional Services | 27 |
| Personal Services | 27 |
| Medical Services | 14 |
| Trade Shops (with Retail Component) | 14 |
| Fitness / Gyms | 9 |
| Dry Cleaners, Laundry | 7 |
| Instructional Services | 7 |
| Auto Repair | 6 |
| Parking Lot | 6 |
| Banks / Financial Services | 5 |
| Hardware, Building Supply | 5 |
| Animal Hospital / Kennel | 4 |
| Clothing, Accessories | 4 |
| Grocery Stores / Small Markets | 4 |
| Bakery w/ Retail | 3 |
| Drug Store / Pharmacy | 3 |
| Massage Establishment | 3 |
| Church | 2 |
| Gas Station / Service Station | 2 |
| Liquor Store | 2 |
| Other Retail | 10 |
| Non-Retail Services | 5 |
| Vacant Storefronts | 30 |

Sales Tax (2nd Quarter, Fiscal Year)

PARKSIDE TARAVAL TRADE AREA



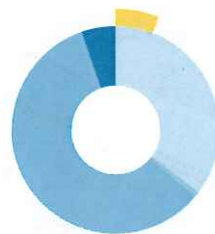
Sales Tax Change 2006-2012

▲ 17%

▲ 11%

Sources: MuniServices; City and County of San Francisco Controller's Office

Demographics



| Demographic | Percentage |
|------------------------------------------------|------------|
| White | 35% |
| Black | 1% |
| Asian | 58% |
| Native American / Hawaiian or Pacific Islander | 0.4% |
| Other / Two or More | 6% |
| % Latino | 6% |

District Population

27,170

No. of Households

9,395

Median Household Income

\$80,130

* Source: November 2012 parcel inventory within Commercial District Area (see boundary map on page 6) conducted by Planning Department / OEWD.

TARAVAL: DEMOGRAPHICS

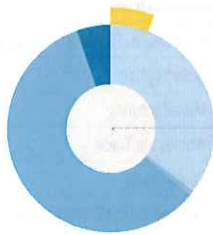
READ DEMOGRAPHICS SUMMARY ON PAGE 2

APPENDIX

Population

27,170

vs. 805,240 Citywide



Race / Background

| | CITYWIDE | PARKSIDE TARAVAL |
|------------------------------------------------|----------|------------------|
| White | 48% | 35% |
| Black | 6% | 1% |
| Asian | 33% | 58% |
| Native American / Hawaiian or Pacific Islander | 1% | 0.4% |
| Other / Two or More | 11% | 6% |
| % Latino | 15% | 6% |
| Male / Female Ratio | 51/49% | 46/54% |
| Foreign Born | 36% | 44% |
| Linguistic Isolated Households | 14% | 18% |

Population Density

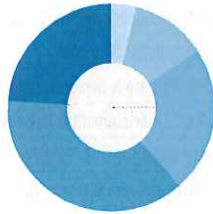
28 per acre

vs. 27 Citywide

Median Age

42.3

vs. 38.5 Citywide



Age

| | CITYWIDE | PARKSIDE TARAVAL |
|-------------|----------|------------------|
| Under 5 | 4% | 4% |
| 5 to 17 | 9% | 12% |
| 18 to 34 | 30% | 23% |
| 35 to 59 | 37% | 38% |
| 60 and over | 19% | 24% |

No. of Households

9,395

vs. 345,810 Citywide

% of Households Without a Car

13%

vs. 29% Citywide

Households

| | CITYWIDE | PARKSIDE TARAVAL |
|-------------------------------|----------|------------------|
| Family Households | 44% | 71% |
| Single-Person Households | 39% | 21% |
| Non-Family Households | 17% | 8% |
| Average Household Size | 2.3 | 2.9 |
| Average Family Household Size | 3.1 | 3.5 |

Median Household Income

\$80,130

vs. \$71,420 Citywide

Unemployment

9%

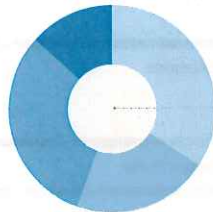
vs. 7% Citywide

Income

| | CITYWIDE | PARKSIDE TARAVAL |
|--------------------------------|----------|------------------|
| Median Family Household Income | \$86,670 | \$95,126 |
| Per Capita Income | \$45,478 | \$36,486 |
| % Poverty | 12% | 7% |
| Unemployment | 7.0% | 9.0% |

Education

A higher percentage of high school graduates or less.



Education

| | CITYWIDE | PARKSIDE TARAVAL |
|--------------------------|----------|------------------|
| High School or Less | 29% | 34% |
| Some College / AA Degree | 20% | 21% |
| College Degree | 31% | 31% |
| Post Graduate | 20% | 13% |

No. of Housing Units

10,100

vs. 376,940 Citywide

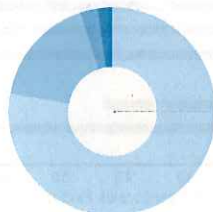
Housing

| | CITYWIDE | PARKSIDE TARAVAL |
|---------------------|----------|------------------|
| Renting Households | 62% | 35% |
| Rental Vacancy Rate | 3.4% | 7% |
| Median Rent | \$1,260 | \$1,561 |

Residential Density

10 units per acre

vs. 12 Citywide



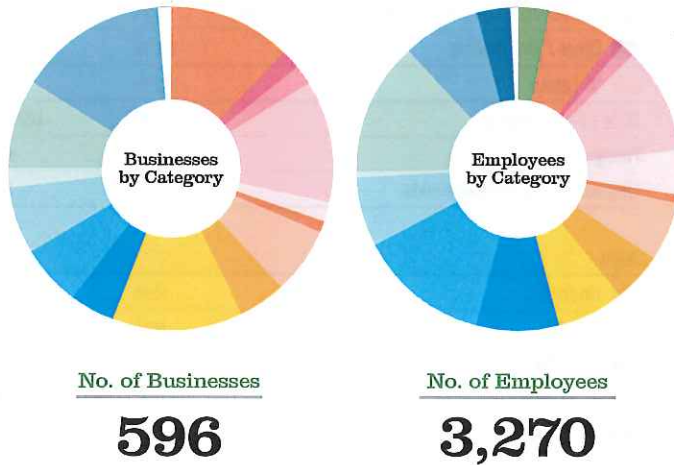
Housing Type

| | CITYWIDE | PARKSIDE TARAVAL |
|-----------------------|----------|------------------|
| Single Family Housing | 33% | 78% |
| 2 - 4 Units | 21% | 17% |
| 5 - 9 Units | 10% | 3% |
| 10 units or more | 35% | 2% |

TARAVAL: BUSINESS MIX

Summary of Business by Categories, 2011

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. ESRI forecasts for 2011.



| NAICS BUSINESS CATEGORY | BUSINESSES | EMPLOYEES |
|----------------------------------------------------|------------|-----------|
| Agriculture, Forestry, Fishing & Hunting | 1 | 112 |
| Construction | 72 | 233 |
| Manufacturing | 13 | 36 |
| Wholesale Trade | 11 | 48 |
| Retail Trade | 73 | 359 |
| Transportation & Warehousing | 12 | 149 |
| Information | 6 | 23 |
| Finance & Insurance | 39 | 204 |
| Real Estate, Rental & Leasing | 28 | 165 |
| Professional, Scientific & Tech Services | 79 | 229 |
| Admin. Support, Waste Mgmt. & Remediation Services | 26 | 278 |
| Educational Services | 36 | 442 |
| Health Care & Social Assistance | 41 | 232 |
| Arts, Entertainment & Recreation | 11 | 22 |
| Accommodation & Food Services | 53 | 453 |
| Other Services (except Public Administration) | 87 | 261 |
| Public Administration | 1 | 112 |
| Unclassified Establishments | 7 | 22 |

Leakage / Surplus Factor by Industry Group, Parkside Taraval

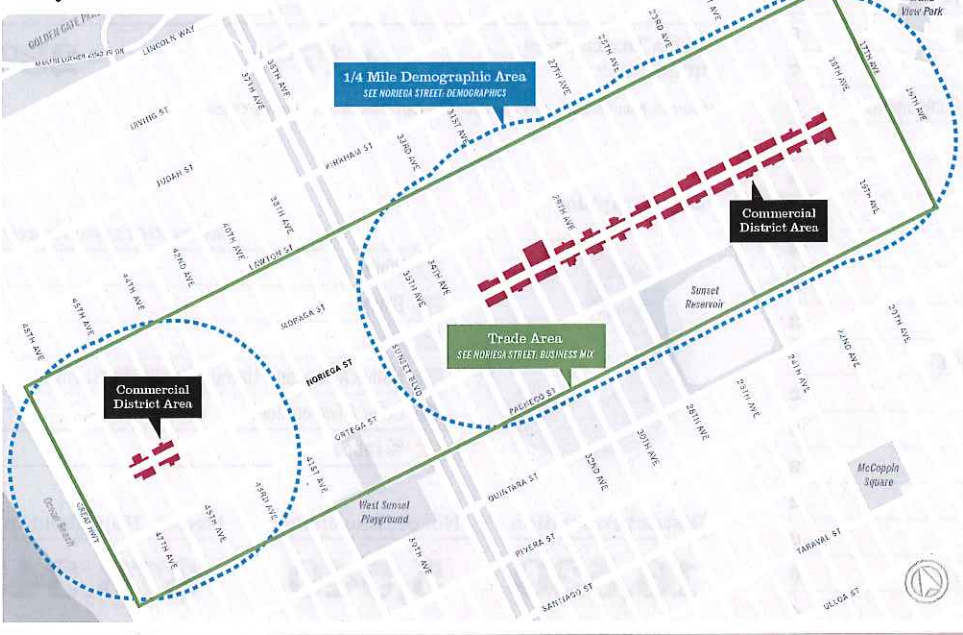
The *Leakage / Surplus Factor* summarizes the relationship between supply (retail sales by businesses in the commercial district) and demand (consumer spending by households within a quarter-mile radius of the commercial district). As the *Leakage / Surplus Factor* trends toward +100, the market is experience leakage, meaning there is less retail activity relative to local demand. As the factor trends toward -100, this means that the market is in surplus and retail activity is in excess of local demand.





NORIEGA STREET

Study Area Boundaries



NOTE:

- Demographic data presented on page 7 represents the area within 1/4 mile of the Noriega Street commercial district.
- Business mix data presented on page 9 corresponds with the Trade Area indicated on the map.
- Noriega Street storefronts data presented on page 4 corresponds with the Commercial District Area indicated on the map.

COMMERCIAL DISTRICT HEALTH

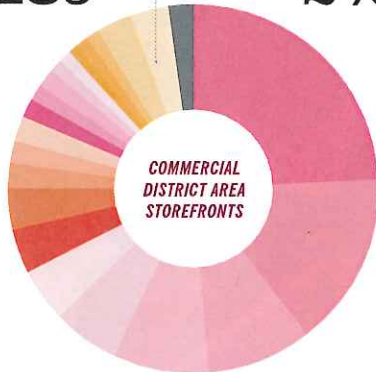
READ COMMERCIAL DISTRICT HEALTH SUMMARY ON PAGE 2



Noriega Street Storefronts

TOTAL STOREFRONTS % VACANT

189 **2%**

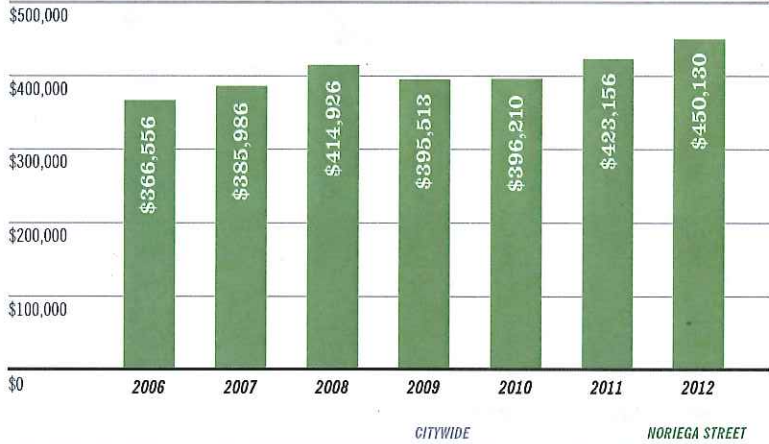


| | |
|-------------------------------------|----|
| Eating and Drinking Places | 46 |
| Medical Service | 29 |
| Personal Service | 17 |
| Business or Professional Service | 16 |
| Grocery Store / Small Market | 11 |
| Banks / Financial Service | 9 |
| Instructional Services | 7 |
| Trade Shops (with Retail Component) | 7 |
| Drug Stores / Pharmacy | 4 |
| Dry Cleaners / Laundry | 4 |
| Other Retail | 4 |
| Church | 3 |
| Fitness / Gyms | 3 |
| Massage Establishment | 3 |
| Appliance, Home Furnishings | 2 |
| Bakery w/ Retail | 2 |
| Clothing, Accessories | 2 |
| Liquor Stores | 2 |
| Tobacco Paraphernalia | 2 |
| Other Retail | 6 |
| Other Non-Retail Services | 6 |
| Vacant Storefronts | 4 |



Sales Tax (2nd Quarter, Fiscal Year)

NORIEGA STREET TRADE AREA



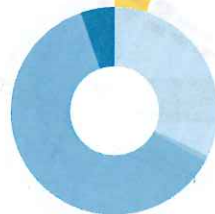
Sales Tax Change 2006-2012

▲ 17%

▲ 23%

Sources: MuniServices; City and County of San Francisco Controller's Office

Demographics



NORIEGA STREET 1/4 MILE DEMOGRAPHIC AREA

| | |
|------------------------------------------------|------|
| White | 32% |
| Black | 1% |
| Asian | 61% |
| Native American / Hawaiian or Pacific Islander | 0.2% |
| Other / Two or More | 5% |
| % Latino | 5% |

District Population

16,520

No. of Households

5,540

Median Household Income

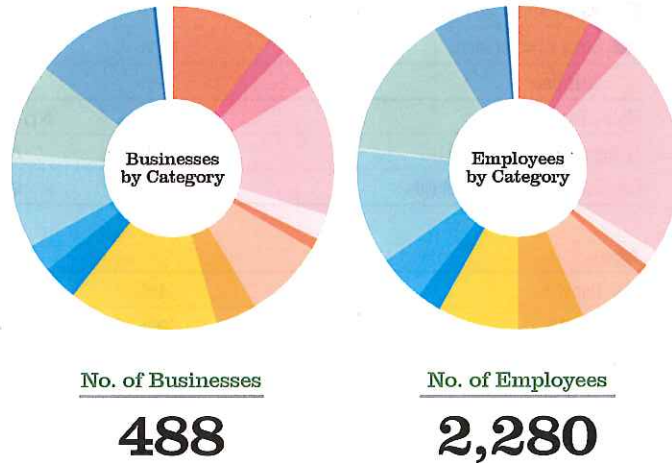
\$73,345

Source: November 2012 parcel inventory within Commercial District Area (see boundary map on page 6) conducted by Planning Department / OEWD.

NORIEGA STREET: BUSINESS MIX

Summary of Business by Categories, 2011

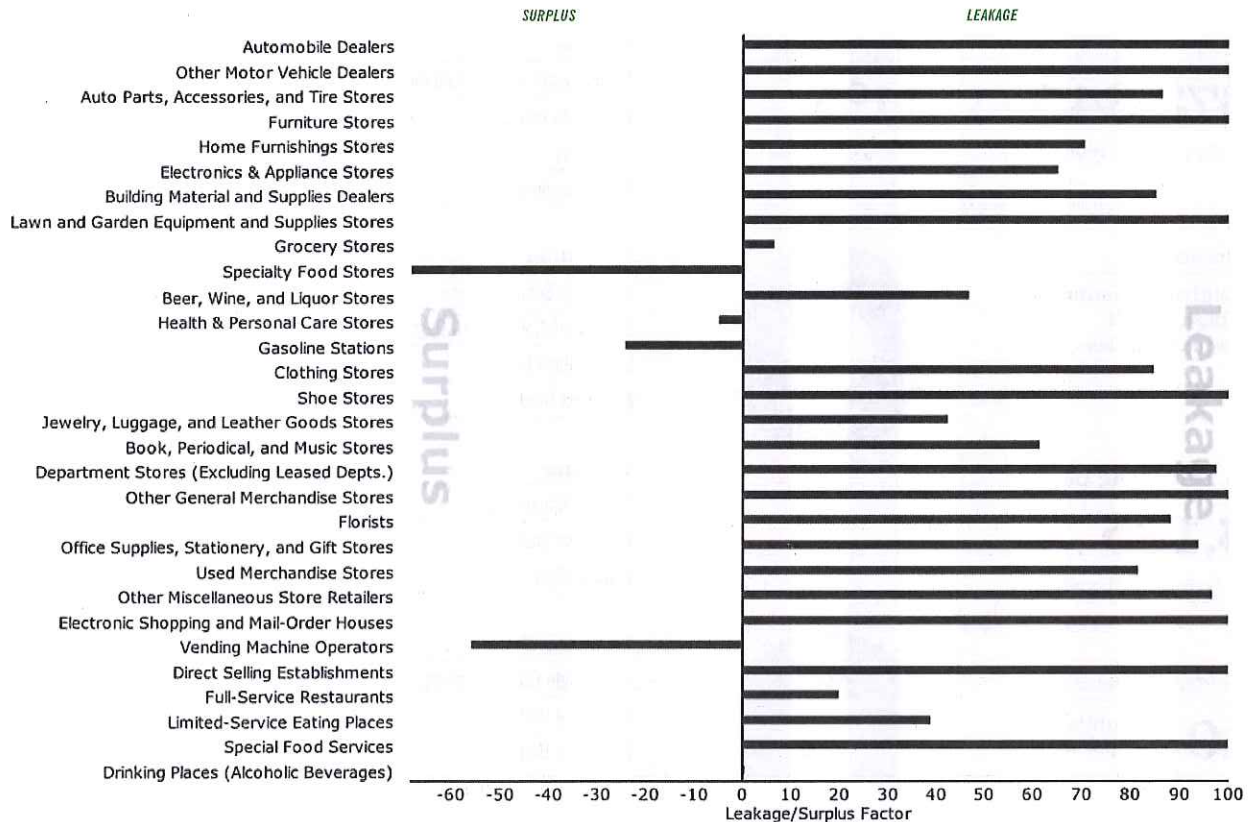
Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. ESRI forecasts for 2011.



| NAICS BUSINESS CATEGORY | BUSINESSES | EMPLOYEES |
|----------------------------------------------------|------------|-----------|
| Construction | 51 | 168 |
| Manufacturing | 9 | 38 |
| Wholesale Trade | 21 | 72 |
| Retail Trade | 65 | 488 |
| Transportation & Warehousing | 12 | 39 |
| Information | 6 | 24 |
| Finance & Insurance | 39 | 162 |
| Real Estate, Rental & Leasing | 20 | 153 |
| Professional, Scientific & Tech Services | 73 | 183 |
| Admin. Support, Waste Mgmt. & Remediation Services | 18 | 54 |
| Educational Services | 14 | 110 |
| Health Care & Social Assistance | 42 | 260 |
| Arts, Entertainment & Recreation | 4 | 6 |
| Accommodation & Food Services | 44 | 326 |
| Other Services (except Public Administration) | 61 | 168 |
| Public Administration | 1 | 3 |
| Unclassified Establishments | 8 | 24 |

Leakage / Surplus Factor by Industry Group, Noriega Street

The *Leakage / Surplus Factor* summarizes the relationship between supply (retail sales by businesses in the commercial district) and demand (consumer spending by households within a quarter-mile radius of the commercial district). As the *Leakage / Surplus Factor* trends toward +100, the market experiences leakage, meaning there is less retail activity relative to local demand. As the factor trends toward -100, this means that the market is in surplus and retail activity is in excess of local demand.



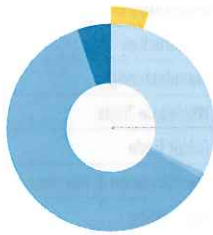
NORIEGA STREET: DEMOGRAPHICS

READ DEMOGRAPHICS SUMMARY ON PAGE 2

Population

16,520

vs. 805,240 Citywide



Race / Background

| | CITYWIDE | NORIEGA STREET |
|------------------------------------------------|----------|----------------|
| White | 48% | 32% |
| Black | 6% | 1% |
| Asian | 33% | 61% |
| Native American / Hawaiian or Pacific Islander | 1% | 0.2% |
| Other / Two or More | 11% | 5% |
| % Latino | 15% | 5% |
| Male / Female Ratio | 51/49% | 51/49% |
| Foreign Born | 36% | 50% |
| Linguistic Isolated Households | 14% | 23% |

Population Density

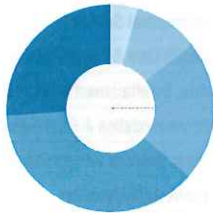
25 per acre

vs. 27 Citywide

Median Age

44.5

vs. 38.5 Citywide



Age

| | CITYWIDE | NORIEGA STREET |
|-------------|----------|----------------|
| Under 5 | 4% | 4% |
| 5 to 17 | 9% | 10% |
| 18 to 34 | 30% | 21% |
| 35 to 59 | 37% | 36% |
| 60 and over | 19% | 25% |

No. of Households

5,540

vs. 345,810 Citywide

% of Households Without a Car

16%

vs. 29% Citywide

Households

| | CITYWIDE | NORIEGA STREET |
|-------------------------------|----------|----------------|
| Family Households | 44% | 66% |
| Single-Person Households | 39% | 17% |
| Non-Family Households | 17% | 17% |
| Average Household Size | 2.3 | 3.3 |
| Average Family Household Size | 3.1 | 3.5 |

Median Household Income

\$73,345

vs. \$71,420 Citywide

Unemployment

11%

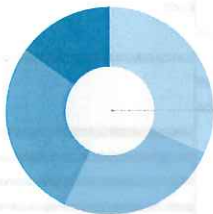
vs. 7% Citywide

Income

| | CITYWIDE | NORIEGA STREET |
|--------------------------------|----------|----------------|
| Median Family Household Income | \$86,670 | \$82,420 |
| Per Capita Income | \$45,478 | \$34,410 |
| % Poverty | 12% | 10% |
| Unemployment | 7.0% | 11.0% |

Education

A higher percentage of high school graduates or less.



Education

| | CITYWIDE | NORIEGA STREET |
|--------------------------|----------|----------------|
| High School or Less | 29% | 32% |
| Some College / AA Degree | 20% | 26% |
| College Degree | 31% | 28% |
| Post Graduate | 20% | 15% |

No. of Housing Units

6,185

vs. 376,940 Citywide

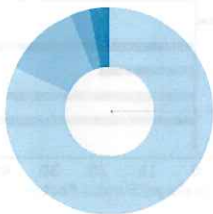
Housing

| | CITYWIDE | NORIEGA STREET |
|---------------------|----------|----------------|
| Renting Households | 62% | 31% |
| Rental Vacancy Rate | 3.4% | n/a |
| Median Rent | \$1,260 | \$1,570 |

Residential Density

10 units per acre

vs. 12 Citywide



Housing Type

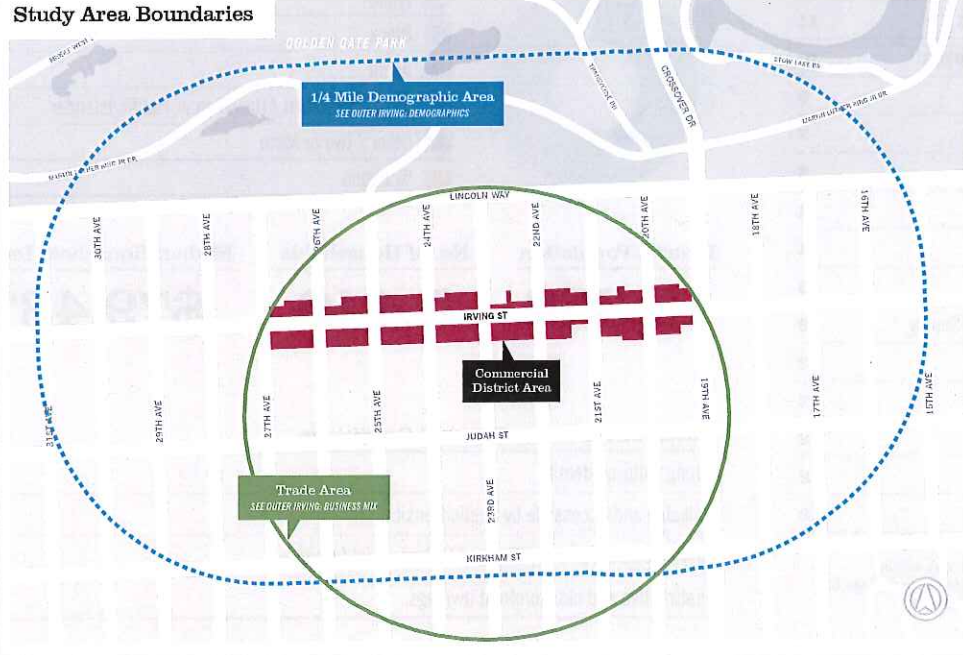
| | CITYWIDE | NORIEGA STREET |
|-----------------------|----------|----------------|
| Single Family Housing | 33% | 83% |
| 2 - 4 Units | 21% | 12% |
| 5 - 9 Units | 10% | 3% |
| 10 units or more | 35% | 3% |

SHISH KADAI
VEGETARIAN COMBO
HUMMUS



OUTER IRVING

Study Area Boundaries



NOTE:

- Demographic data presented on page 7 represents the area within 1/4 mile of the Outer Irving commercial district.
- Business mix data presented on page 9 corresponds with the Trade Area indicated on the map.
- Outer Irving storefronts data presented on page 4 corresponds with the Commercial District Area indicated on the map.

COMMERCIAL DISTRICT HEALTH

READ COMMERCIAL DISTRICT HEALTH SUMMARY ON PAGE 2



Outer Irving Storefronts

TOTAL STOREFRONTS % VACANT

157 **8%**

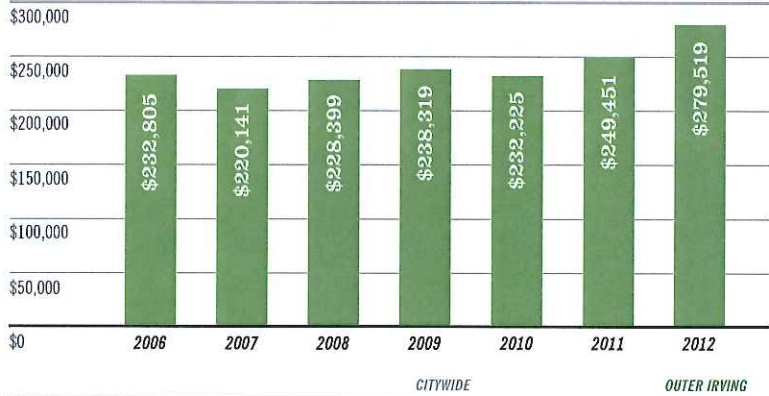


| Category | Count |
|-----------------------------------|-------|
| Eating and Drinking Places | 38 |
| Personal Services | 18 |
| Business or Professional Services | 12 |
| Medical Services | 12 |
| Banks / Financial Services | 11 |
| Grocery Stores / Small Markets | 10 |
| Other Retail | 9 |
| Dry Cleaners / Laundry | 7 |
| Other Non-Retail Services | 6 |
| Bakery w/ Retail | 4 |
| Electronics Retail | 4 |
| Clothing / Accessories | 3 |
| Housewares / Restaurant Supply | 3 |
| Gifts | 2 |
| Sporting Goods | 2 |
| Supermarkets | 2 |
| Variety / Discount | 2 |
| Vacant Storefronts | 12 |

Source: November 2012 parcel inventory within Commercial District Area (see boundary map on page 6) conducted by Planning Department / OEWD.

Sales Tax (2nd Quarter, Fiscal Year)

OUTER IRVING TRADE AREA



Sales Tax Change 2006-2012

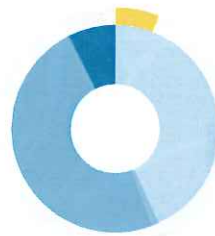
▲ 17%

▲ 20%

Sources: MuniServices; City and County of San Francisco Controller's Office

Demographics

OUTER IRVING 1/4 MILE DEMOGRAPHIC AREA



| | |
|------------------------------------------------|------|
| White | 43% |
| Black | 1% |
| Asian | 48% |
| Native American / Hawaiian or Pacific Islander | 0.3% |
| Other / Two or More | 7% |
| % Latino | 6% |

District Population

No. of Households

Median Household Income

13,386

5,440

\$79,437

Observations About Physical Conditions

| | |
|--------------------------------------------------------------|---|
| Strong cultural identity. | 😊 |
| Walkable and accessible by public transit. | 😊 |
| Dirty sidewalks, poor lighting and lack of street furniture. | 😞 |
| Unattractive and old storefront awnings. | 😞 |

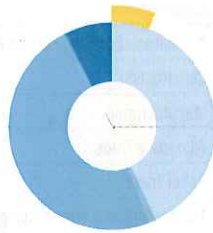
OUTER IRVING: DEMOGRAPHICS

READ DEMOGRAPHICS SUMMARY ON PAGE 2

Population

13,386

vs. 805,240 Citywide



Race / Background

| | CITYWIDE | OUTER IRVING |
|------------------------------------------------|----------|--------------|
| White | 48% | 43% |
| Black | 6% | 1% |
| Asian | 33% | 48% |
| Native American / Hawaiian or Pacific Islander | 1% | 0.3% |
| Other / Two or More | 11% | 7% |
| % Latino | 15% | 6% |
| Male / Female Ratio | 51/49% | 48/52% |
| Foreign Born | 36% | 40% |
| Linguistic Isolated Households | 14% | 18% |

Population Density

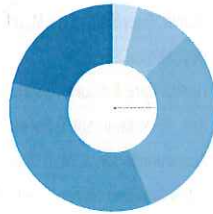
42 per acre

vs. 27 Citywide

Median Age

38.1

vs. 38.5 Citywide



Age

| | CITYWIDE | OUTER IRVING |
|-------------|----------|--------------|
| Under 5 | 4% | 4% |
| 5 to 17 | 9% | 9% |
| 18 to 34 | 30% | 31% |
| 35 to 59 | 37% | 35% |
| 60 and over | 19% | 21% |

No. of Households

5,440

vs. 345,810 Citywide

% of Households Without a Car

18%

vs. 29% Citywide

Households

| | CITYWIDE | OUTER IRVING |
|-------------------------------|----------|--------------|
| Family Households | 44% | 57% |
| Single-Person Households | 39% | 30% |
| Non-Family Households | 17% | 13% |
| Average Household Size | 2.3 | 2.5 |
| Average Family Household Size | 3.1 | 3.2 |

Median Household Income

\$79,437

vs. \$71,420 Citywide

Unemployment

6.0%

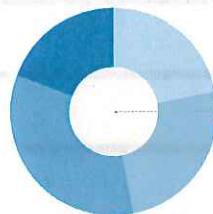
vs. 7% Citywide

Income

| | CITYWIDE | OUTER IRVING |
|--------------------------------|----------|--------------|
| Median Family Household Income | \$86,670 | \$95,324 |
| Per Capita Income | \$45,478 | \$38,683 |
| % Poverty | 12% | 10% |
| Unemployment | 7.0% | 6.0% |

Education

A higher percentage of college graduates or more.



Education

| | CITYWIDE | OUTER IRVING |
|--------------------------|----------|--------------|
| High School or Less | 29% | 22% |
| Some College / AA Degree | 20% | 25% |
| College Degree | 31% | 34% |
| Post Graduate | 20% | 19% |

No. of Housing Units

5,635

vs. 376,940 Citywide

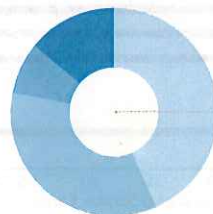
Housing

| | CITYWIDE | OUTER IRVING |
|---------------------|----------|--------------|
| Renting Households | 62% | 62% |
| Rental Vacancy Rate | 3.4% | n/a |
| Median Rent | \$1,260 | \$1,399 |

Residential Density

17 units per acre

vs. 12 Citywide



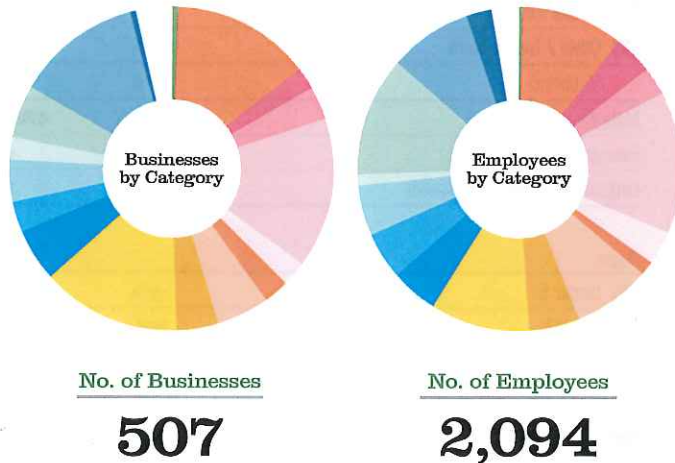
Housing Type

| | CITYWIDE | OUTER IRVING |
|-----------------------|----------|--------------|
| Single Family Housing | 33% | 44% |
| 2 - 4 Units | 21% | 35% |
| 5 - 9 Units | 10% | 8% |
| 10 units or more | 35% | 14% |

OUTER IRVING: BUSINESS MIX

Summary of Business by Categories, 2011

Source: Business data provided by Infogroup, Omaha NE Copyright 2012, all rights reserved. ESRI forecasts for 2011.



| NAICS BUSINESS CATEGORY | BUSINESSES | EMPLOYEES |
|----------------------------------------------------|------------|-----------|
| Agriculture, Forestry, Fishing & Hunting | 3 | 6 |
| Construction | 71 | 215 |
| Manufacturing | 11 | 82 |
| Wholesale Trade | 16 | 59 |
| Retail Trade | 77 | 295 |
| Transportation & Warehousing | 12 | 71 |
| Information | 13 | 33 |
| Finance & Insurance | 26 | 162 |
| Real Estate, Rental & Leasing | 21 | 103 |
| Professional, Scientific & Tech Services | 70 | 211 |
| Admin. Support, Waste Mgmt. & Remediation Services | 27 | 99 |
| Educational Services | 16 | 99 |
| Health Care & Social Assistance | 21 | 101 |
| Arts, Entertainment & Recreation | 11 | 26 |
| Accommodation & Food Services | 27 | 247 |
| Other Services (except Public Administration) | 62 | 177 |
| Public Administration | 3 | 52 |
| Unclassified Establishments | 18 | 55 |

Leakage / Surplus Factor by Industry Group, Outer Irving

The *Leakage / Surplus Factor* summarizes the relationship between supply (retail sales by businesses in the commercial district) and demand (consumer spending by households within a quarter-mile radius of the commercial district). As the *Leakage / Surplus Factor* trends toward +100, the market is experience leakage, meaning there is less retail activity relative to local demand. As the factor trends toward -100, this means that the market is in surplus and retail activity is in excess of local demand.

