

UC Berkeley

IURD Working Paper Series

Title

A Market Study to Support Neighborhood Commercial Revitalization in the San Antonio Community Development District

Permalink

<https://escholarship.org/uc/item/2gg0x5zz>

Author

Santana, Anibal Hernandez

Publication Date

1991-11-01

Peer reviewed

Working Paper 91-09

(formerly WP 021)

A Market Study to Support Neighborhood Commercial Revitalization in the San Antonio Community Development District

Anibal Hernandez Santana



The University-Oakland Metropolitan Forum is a partnership of the University of California at Berkeley; California State University, Hayward; Mills College; Holy Names College; the Peralta Community College District; and the Oakland community.

University of California at Berkeley
Institute of Urban and Regional Development

Table of Contents

INTRODUCTION	1
The Problem and Opportunities	1
The Participants	2
The Method	3
FINDINGS	6
<i>What do San Antonio residents spend their money on?</i>	6
<i>Where do San Antonio residents shop, and who shops in San Antonio?</i>	9
<i>How do San Antonio residents perceive their local shopping areas?</i>	12
<i>What Retail Activities are desired and feasible in San Antonio?</i>	16
ISSUES IN INTERPRETING THE AGGREGATE SALES DATA	19
CONCLUSIONS	20
RECOMMENDATIONS	21
APPENDIX	A-1 through C

List of Figures and Tables

Figures

1	Sales Volume for 1989-1990	8
2	Sales in the Area vs. Sales leaked, 1989-1990	11
3	Consumer Preferences, San Antonio survey	15
4	Desired kinds of Stores, San Antonio survey	17
5	Supportable square feet by type, San Antonio and Fruitvale	18

Tables

1	Race and Income of Respondents, San Antonio survey	6
2	Other demographic data, San Antonio survey	6
3	Total Sales and Square Feet, 1989-1990	8
4	Total Sales by Commercial Area, State BOE categories	12
5	Total square feet by Commercial Area, State BOE categories	12

Appendix

see page 23

EXECUTIVE SUMMARY

This report is a synthesis of several major studies about the market potential in the Community Development District of San Antonio, in the city of Oakland. This research, conducted under the auspices of the University-Oakland Metropolitan Forum, had three phases: first, the Coro Foundation helped to provide an overview of the commercial climate in San Antonio; later, a consumer survey of neighborhood residents was administered and analyzed; and finally, an aggregate demand analysis was completed to determine what commercial uses ought to be expanded given the income and unmet needs of the neighborhood.

All three reports consistently found that residents are going outside the district to purchase a large number of consumer goods. This is primarily due to the perception of the commercial strips as an unsafe area and to the fact that businesses are so limited and scattered. The market study determined that the types of additional retailing that may be supported are general merchandise, food stores, drug stores, and apparel. The consumer preference is towards retail centers consisting of large stores that offer the elements of variety and convenience. However, in order for this recommendation to be successful, three issues need to be resolved: the safety of the neighborhood, the quality of the products, and the attractiveness of the area. There are other concerns as well that may help if improved, but they pale in importance when compared to the three main issues.

Recommendations to help in the effort of commercial revitalization include a rezoning of the district to concentrate commercial uses in certain intersections, a capital improvement program to undertake facade improvements and beautify the area, and other necessary additives like better street lighting and more police protection. The location of a large supermarket was suggested for the east end of 14th Street in the San Antonio district; other possible locations for a medium-size retail complex should be explored. The nature of each commercial area must be taken in consideration when devising marketing strategies and the report concludes that New Asiatown should increase its regional share by emphasizing its unique products, 23rd Avenue should concentrate on local-serving needs, and that East 14th Street is the most appropriate area to attract retail anchors and for mixed housing and retail developments. Revitalization efforts should begin where the most potential exists because this should create spillover effects and precipitate a positive commercial environment that will attract further investments.

A MARKET STUDY TO SUPPORT NEIGHBORHOOD COMMERCIAL REVITALIZATION IN SAN ANTONIO, CITY OF OAKLAND

The intent of this report is to facilitate a deeper understanding of the market potential in San Antonio by combining the findings from three major studies that span two years of research conducted under the auspices of the University-Oakland Metropolitan Forum. The Forum is a partnership dedicated to using the resources of colleges and universities to enhance the quality of life in the Oakland region.¹ In existence for more than five years, the Forum is broadly representative of the community, with over 600 persons involved at this time, and provides settings for nonpartisan analysis, discussion, and leadership on critical issues facing Oakland.

Community representatives and residents have been an integral part of this process through contact groups and surveys. A large number of individuals were interviewed and/or consulted, such as merchants, elected officials, government employees, church leaders, educators and university professors. The Forum staff and graduate students at Berkeley participated in all aspects of the research. Other organizations that have been involved include the San Antonio Community Development Corporation (SACDC), the East Bay Asian Local Development Corporation (EBALDC), the Oakland Community Housing Incorporated (OCHI), the Coro Foundation, and the City of Oakland Office of Economic Development and Employment (OEDE).

The Problem and Opportunities

Economic disinvestment of commercial businesses since the 1970s has left the San Antonio neighborhood with social and economic problems common to many urban areas. The problem addressed by the market study, related to this larger issue, is the lack of diverse businesses and of stores with basic goods and services such as banks, supermarkets, drug stores, etcetera.

The San Antonio neighborhood is a community of great racial and ethnic diversity whose population below the poverty level reach proportions nearly 10 percent higher than the city-wide rate. In 1988, the flatlands households in San Antonio had an estimated median

¹ Participating institutions of higher education include Holy Names College; Mills College; California State University, Hayward; Peralta Community College District; and the University of California at Berkeley.

income of \$15,000.² In addition, according to the 1980 Census 19% of the residents were unemployed, while the city-wide unemployment rate was 7.5% . It is now generally recognized how business disinvestment coincided with 'white flight.' As the middle class residents left for the suburbs during the 1960s and 1970s, large businesses such as Bank of America, Wells Fargo and Sanwa Bank closed San Antonio branches; later, Safeway and Montgomery Ward closed as well.

The market study shows that although these problems exist, many opportunities have not been addressed. For instance, the Coro report identified some untapped resources and found much reason for optimism in commercial revitalization efforts:

The District's proximity to downtown Oakland, in combination with local commercial rents, as much as a third lower than downtown rents, create a steadily rising tide of local commercial activity. The commercial strips on East 12th and East 14th Streets, in particular, are showing the rapid growth of Asian small businesses spilling over from nearby Downtown Chinatown.

There are many under-utilized or vacant commercial properties, as well as some vacant land. This is presently viewed as a negative trait of the physical aspect of the neighborhood but also represents added opportunities for local or interested entrepreneurs. Notwithstanding the positive aspects emphasized above, San Antonio will have to deal with many of the challenges faced by most of the Oakland neighborhoods. To mention a few, the ethnic diversity presents the challenge of including a broad, representative group in any planning process. Perhaps more importantly, the need to strike a balance between promoting business development and providing well designed, affordable housing can be very difficult to meet.

As efforts to develop commercial areas in these neighborhoods continue, it is important to reflect on the conclusions derived from extensive market studies like the ones to be discussed here. This report is an attempt to combine and simplify the findings from three major studies that span over two years of research directed by the University-Oakland

² Quoted in Coro Report, "Western Economic Research Co, 1988."

Metropolitan Forum. It is the intent of the Forum that the report will facilitate a deeper understanding of the market potential in San Antonio and that the maximum number of people will benefit from this information.

The Method

The market study is part of a two year planning process the University-Oakland Metropolitan Forum is undertaking in the San Antonio and Fruitvale neighborhoods. The first part of the process is to set up a contact group in the neighborhood. Then a general plan is produced, outlining the neighborhood's problems, opportunities, and goals. The neighborhood residents then choose the most important revitalization priorities, and designs and plans are produced. With this market study, the San Antonio District has entered the third phase of the process.

The development of the market study began in 1988 in the San Antonio neighborhood, when students from the UC Berkeley Department of City and Regional Planning prepared a preliminary planning and policy review of the neighborhood. The process continued in late 1988 and early 1990, when the Forum commissioned five Coro Foundation Fellows to undertake a land use and commercial inventory along targeted commercial areas. In addition, their market study consisted of a license plate survey, retail anchor identification, and competing shopping area analysis. (See appendix A for methodology.) The Coro Fellows also conducted informal interviews with community leaders, representatives, merchants, and people active in San Antonio. With the help of the SACDC a contact group was formed that could advise and guide the Forum in its planning and revitalization efforts. As a result of these efforts and in response to the needs of the SACDC and EBALDC, a *Consumer Demand Survey* was initiated. The SACDC and EBALDC used this survey to assist in their joint venture to develop a mixed-use housing and commercial project near the

intersection of East 14th Street and 25th Avenue (Star Market site).³

The *Consumer Demand Survey* is a representative sample of the population in the San Antonio Community Development District area. It was developed based on different proposals presented by students of a Research Methods class at the Department of City and Regional Planning, University of California at Berkeley. The survey was translated in five languages (Spanish, Cantonese, Laotian, Vietnamese, and Cambodian) and designed to reveal information about residents' shopping habits, their concerns and levels of satisfaction with the neighborhood commercial areas, and their household characteristics (see Appendix for methodology). One of the objectives was to rate the shopping areas of East 12th Street, East 14th Street, East 18th Street and 23rd Avenue. Particularly East 12th and East 14th streets were studied in more detail and compared to other areas.

Finally, in order to complement the emphasis on the consumer's perceptions provided by the survey, an *Aggregate Demand Analysis* looked at some commercial areas in San Antonio, and added nearby sections from the Fruitvale district as well. The four commercial areas that were examined were East 12th Street, East 14th Street, Foothill Boulevard, and 23rd Avenue. A larger geographical area was targeted for the market analysis because of the close proximity between both districts, thus providing a more realistic assessment of the trade area and the prospects for commercial development. However, for purposes of this analysis primary attention is focused on San Antonio. A primary and secondary trade area were delineated based on distance and willingness of potential customers to shop in the four commercial areas mentioned above. The primary trade area was defined as the western areas of San Antonio and Fruitvale, made up of the two zip code areas of 94606 and 94601. The secondary trade area is located in the eastern areas of San Antonio and Fruitvale toward the hills, consisting of zip code areas 94610 and 94602. The analysis compared actual sales versus potential capturable sales based on the buying power of residents in the

³ After receiving a *Neighborhood Commercial Revitalization (NCR)* grant, the San Antonio CDC drafted an NCR plan that utilized the information provided by the studies mentioned thus far, plus the preliminary results from the survey. See the "*Neighborhood Commercial Revitalization Plan*," November 1990, submitted by Don Davenport, Executive Director of SACDC.

trade area. The resulting number is called "sales leakage." This estimate helps in the assessment of the types of commercial uses that may be targeted for development in the area, in terms of additional square footage of commercial space that could be supported. (See Appendix for further information).

The complete market study combines the findings of the Coro Report, the Consumer Demand Survey, and the Aggregate Demand Analysis. Over the two year period, the methodologies developed from broader to more specific information. That is, the Coro Report provided a general overview of San Antonio's commercial climate. In turn, the Consumer Demand Survey focused primarily on the residents' opinions about the area and their spending patterns. Lastly, the Aggregate Demand Analysis took a hard look at the businesses sales volume to derive its conclusions. Each part of the market study addresses certain questions emphasizing a different aspect of the issue; collectively, they provide a more accurate portrayal of the market. The questions posed are:

- * What do San Antonio residents spend their money on?
- * Where do San Antonio residents shop?
- * How do San Antonio residents perceive their local shopping areas?
- * What retail activities are desired and feasible, i.e. food stores, clothing stores, mixed retail?

The next section will address these questions as answered by each part of the study. Before proceeding, however, it is appropriate to briefly describe the profile of residents as collected by the consumer survey:⁴

Household size ranged from one member to as many as fourteen, with the median size being a three-person household [Avg. 3.7].⁵ Most respondents were around forty years old, but the ages ranged from sixteen to eighty-three (Avg. 42.3, Median 40.0). Even though one finds a considerable number of households in every income bracket (0 to \$50,000+ in increments of 10K), 47 percent of the families classified themselves within the first two categories (0 to \$19,999)... Renters of property were in the

⁴ Draft report, *The 1990 Consumer Demand Survey*, by A. Hernandez Santana, March 1991.

⁵ Median means that half the responses were less than 3 and half were more.

overwhelming majority. Home owners represent only 37 percent of the sample, which is to be expected in a low-to-middle income neighborhood. The ethnic composition also came very close to what was expected: Whites 26%, Blacks 19%, Hispanics 10%, Asians 42%, and the remainder 3% were Native Americans or other races. Finally, almost half the residents were married and have lived in San Antonio for seven years or more.

Surveyed Population

Table 1

RACE AND INCOME OF RESPONDENTS			
Ethnic Composition		Income Categories	
Whites	26%	less than \$10,000	27%
Blacks	19%	\$10,000 to 19,999	20%
Hispanics	10%	\$20,000 to 29,999	19%
Asians	42%	\$30,000 to 39,999	18%
Native Americans	2%	\$40,000 to 49,999	8%
Other	1%	\$50,000 and over	8%

Table 2

DEMOGRAPHIC DATA			
<i>Avg. Household Size</i>	3.7	<i>Married</i>	47.7%
<i>Avg. age of respondent</i>	42.3	<i>Renters</i>	62.8%

What do San Antonio residents spend their money on?

This is an important question and one which the consumer survey answers directly. A better understanding of consumer expenditures can provide a clearer idea of what is needed most in the neighborhood. The aggregate demand analysis, on the other hand, does not look for

how much the people of San Antonio in particular spend on different items, but rather uses assumptions based on average expenditures in the state of California.

The findings of the survey conclude that spending habits in San Antonio are not different from other areas. Expectedly, San Antonio residents place basic necessities such as food items before entertainment. For example, when comparing weekly expenditures a large percentage (60%) of households spend less than \$25.00 on entertainment, while 78% spend anywhere from \$26.00 to \$100.00 a week on food items. For the most part, San Antonians engage in rather inexpensive entertainment activities like reading books, magazines, and watching video movies. As for monthly expenses on clothing, 39% spend \$25.00 or less followed by 33% who spend up to \$50.00. This is a considerable amount when taking into account that it refers to only one person per month.

The *aggregate demand* findings show that car dealers and suppliers were the number one sales generator for the trade area. However, the high volume was found to be based on a regional attraction to this business. Industrial uses came in second in sales volume but were not considered part of the study. The items that are locally based by nature such as food stores, restaurants, drug stores and general merchandise, were items that were not well captured by local businesses. Based on the analysis, the sales volume for the local items does not represent the total dollar amount spent within that category by the residents of the area. Thus, we conclude that residents in the area shop for these types of items outside of San Antonio and Fruitvale. See the next section for an explanation of where the residents do shop.

The next table and figure 1 show the highest volume of sales in descending order for the different categories. Given the data source, however, it is impossible to determine what portion of those cash receipts involve people who live in the neighborhood. As explained before, the study uses assumptions based on average expenditures for the state of California.

Table 3

San Antonio & Fruitvale Market Analysis

TOTAL SALES & SQUARE FEET BY HIGHEST VOLUME OF SALES TO LOWEST
FOR THE 1989-1990 FISCAL YEAR

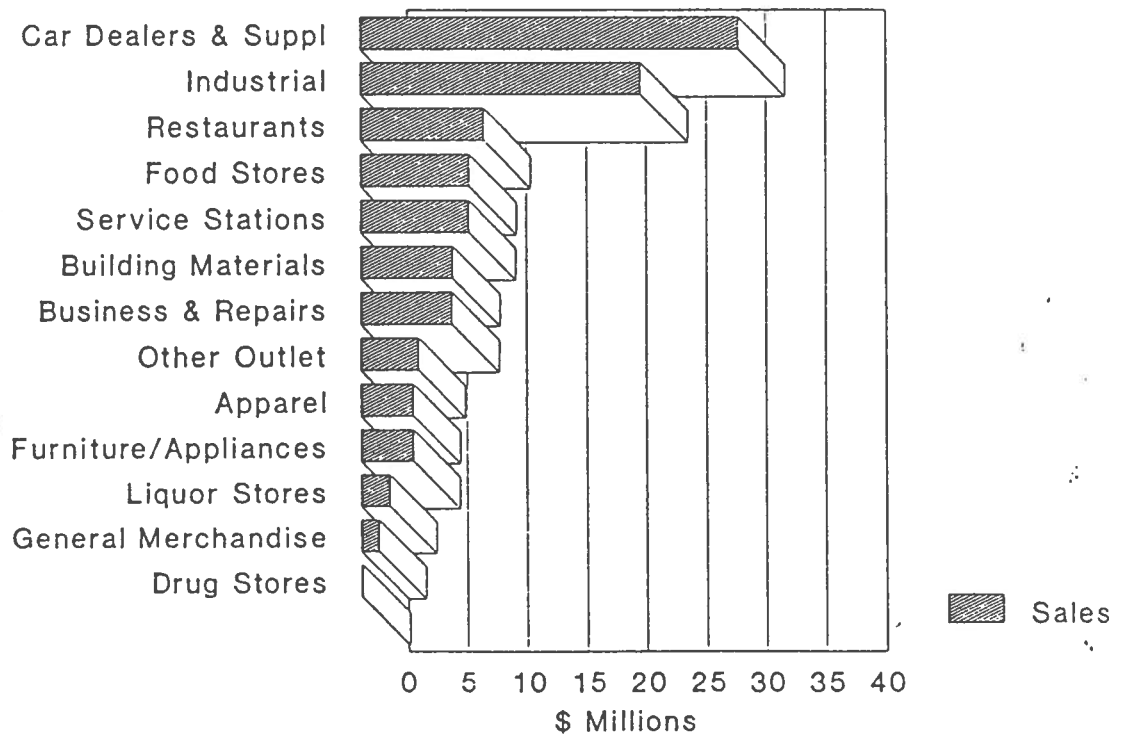
RETAIL TYPE	Total Sales+	Total Square Feet	Sales Per Square Foot
Car Dealers & Supplies	\$31,631,789	318,817	\$99
Industrial	\$23,458,948	326,650	\$72
Restaurants	\$10,351,895	190,160	\$54
Food Stores	\$9,132,737	173,076	\$53
Service Stations	\$9,071,895	58,842	\$154
Building Materials	\$7,727,684	97,540	\$79
Business & Repair	\$7,656,210	459,082	\$17
Other Outlet	\$4,829,685	164,375	\$29
Apparel	\$4,388,526	25,371	\$173
Furniture & Appliances	\$4,387,579	200,662	\$22
Liquor Stores	\$2,400,105	26,247	\$91
General Merchandise	\$1,487,292	18,242	\$82
Drug Stores	\$144,947	9,662	\$15
Total	\$116,669,291	2,068,726	\$56

+ Sales information is from the State Board of Equalization, 1989-1990.

Source: City of Oakland's Office of Economic Development and Employment, 1990.

Figure 1

San Antonio & Fruitvale Market Analysis
Sales Volume for the 1989-1990 Year



Source: The sales for data was supplied by the State Board of Equalization.

Where do San Antonio residents shop, and who shops in San Antonio?

The answer to this question was tackled differently by each part of the study. The Coro report used the license plate survey to estimate the district's trade area by ascertaining the residences of driving customers. By recording license plates of cars parked around commercial areas, the City is able to determine from DMV records the zip codes where customers originate. The *consumer demand survey* obtained more specific information by looking at different types of retail and asking what is the preferred area to shop for those items. The information collected for the *aggregate demand* shows actual sales per business category for each of the four areas in San Antonio and Fruitvale. Consequently, one gets some idea of where residents may be shopping for certain types of goods and services.

The results of the license plate survey show that the largest regional draw was found at East 12th Street (from 5th to 14th Avenues). Only one third of the customers came from inside the district while another third came from areas outside the East Bay-- the last third was from within Alameda and Contra Costa counties. It is important to note that the commercial areas with car dealers and suppliers, such as E.12th St. and some parts of E.14th Street, have the majority of their customers coming from outside the district. The abundance of used car lots is surely the main reason.

At the intersection of East 18th Street and Park Boulevard, 60% of the customers come from within the district. Similarly, two thirds of the customers in the New Asiatown (5th to 14th Ave.) area come from within the San Antonio Community District area. On the other hand, the upper half of East 14th Street, and 23rd Avenue, only attract half of its customers from within the district (the sample for 23rd Ave was also much smaller, almost 1/4 of the E.14th Street sample). Finally, the study also looked at competing shopping centers (Chinatown, Lakeshore, and Fruitvale). Out of similar sample sizes, Lucky's on Lakeshore Avenue attracted the most customers from San Antonio at 47%, with Chinatown and Fruitvale showing approximately one third of its customers from within the district, 39% and 31% respectively.

The *consumer survey* provided some location-specific information in reference to shopping areas. First of all the responses reveal that consumers mostly shop outside the boundaries of San Antonio. Of the shopping that does take place within the district, most people go food shopping at East 18th Street/ Park Boulevard and concentrate on East 14th Street when looking for clothes. This makes absolute sense since the only apparel retail space is found on East 14th Street. The main competitors are Downtown Chinatown and Lakeshore Avenue (for food shoppers) and Downtown, Eastmont Mall and Chinatown, in that order, for clothing shoppers. In addition, the overwhelming majority (80% of respondents) state that they spend more money in supermarkets than in local food stores and that their preference for clothing store-type is department stores. Therefore, it is clear that consumers are doing most of their shopping in the largest stores.

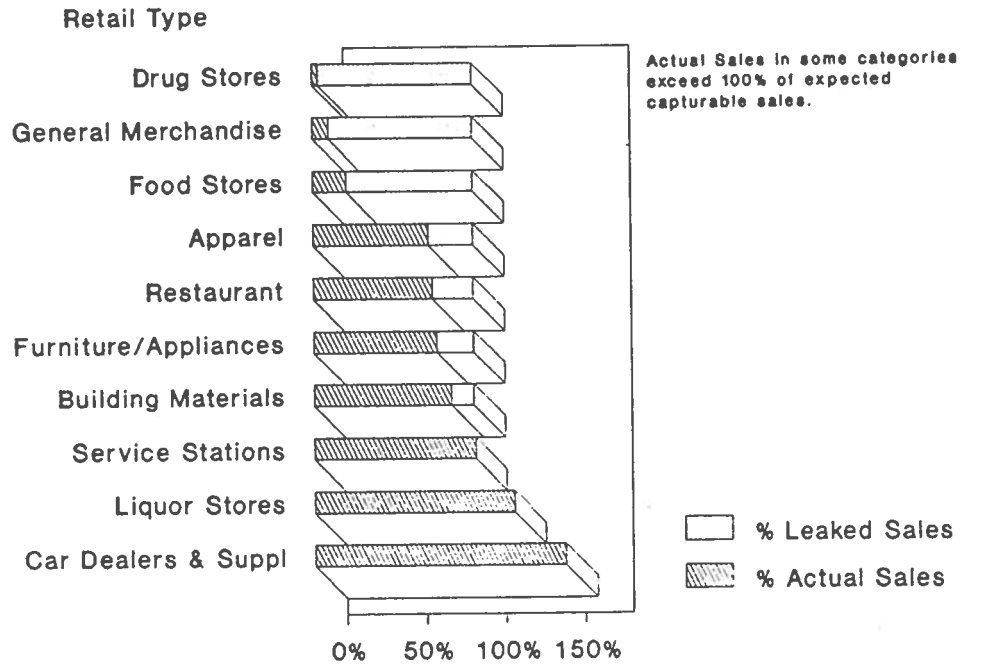
Gas stations are widely used within San Antonio, according to the survey. Generally, residents go outside San Antonio for such services as eating out or banking services, but are indifferent toward services like haircutters or dry cleaners. Big ticket items (cars, TV) are mostly bought outside San Antonio or even outside Oakland, in similar proportions (i.e. approx. 8% in San Antonio, 30% outside S.A., 60% outside Oakland). On the other hand, a large percentage of San Antonians still buy their furniture in Oakland (46%), which is easily explained by the fact that buyers usually pay extra for delivery of furniture.

A comparison of actual sales versus potential sales, based on residents' income levels, was made to assess sales leaked to areas outside the San Antonio and Fruitvale area (see figure 2, next page). Three retail types (car dealers and suppliers, liquor stores, and service stations) captured customers from within San Antonio and Fruitvale as well as outside the area. The three types of goods with the most loss to businesses outside the neighborhood were drug stores, general merchandise, and food stores. General merchandise and drug stores have the highest leakage rate at 90.4% and 90.6% respectively. Food items have a sales leakage of 79.5% and apparel has a sales leakage of 28.1% .

Figure 2

San Antonio & Fruitvale Market Analysis

Sales in Area vs. Sales Leaked to Other Areas, 1989-1990



The next tables show the dollar amount of sales and commercial square feet for each of the selected areas. Sales revenue for the trade area shows that the majority of sales are generated on East 14th Street. This is because most of the district's business establishments are located there. East 14th Street has 258 businesses as compared to East 12th street with 125 businesses, Foothill Boulevard with 45 businesses, and 23rd Avenue with 13 businesses. Not surprisingly, sales volumes correspond to the number of businesses in the area with East 12th Street, Foothill Boulevard, and 23rd Avenue showing second, third, and fourth in sales generated, respectively.

Tables 3 and 4

San Antonio & Fruitvale Market Analysis

The Four Commercial Areas

TOTAL SALES AND SQUARE FEET

BY STATE BOARD OF EQUALIZATION CATEGORIES

	Total Sales* by Commercial Street				TOTAL SALES
	14th	23rd	Foothill Blvd	12th	
APPAREL	\$4,388,526	0	0	\$0	\$4,388,526
GENERAL MERCHANDISE	\$1,467,789	0	0	\$19,503	\$1,487,292
OTHER OUTLET	\$4,585,053	\$140,526	\$78,211	\$25,895	\$4,829,685
GROCERY STORES	\$1,119,368	\$190,211	\$7,438,526	\$384,632	\$9,132,737
LIQUOR STORES	\$1,014,105	\$353,474	\$717,158	\$315,368	\$2,400,105
RESTAURANTS	\$7,199,684	\$50,316	\$459,263	\$2,642,632	\$10,351,895
DRUG STORES	\$144,947	0	0	\$0	\$144,947
FURNITURE/APPLIANCES	\$4,385,684	\$1,895	0	\$0	\$4,387,579
BUILDING MATERIALS	\$7,240,000	0	0	\$487,684	\$7,727,684
CAR DEALERS/SUPPLIES	\$24,295,789	0	\$1,838,842	\$5,497,158	\$31,631,789
SERVICE STATIONS	\$5,147,474	0	0	\$3,924,421	\$9,071,895
BUSINESS & REPAIR	\$3,987,684	\$55,263	\$446,316	\$3,166,947	\$7,656,210
INDUSTRIAL	\$15,198,211	0	0	\$8,260,737	\$23,458,948
Total	\$80,174,314	\$791,684	\$10,978,316	\$24,724,977	\$116,669,291

	Total Square Feet by Commercial Area				TOTAL SQFT
	14th	23rd	Foothill Blvd	12th	
APPAREL	25,371	0	0	0	25,371
GENERAL MERCHANDISE	16,082	0	0	2,160	18,242
OTHER OUTLET	158,810	0	3,420	2,145	164,375
GROCERY STORES	75,544	3,078	81,599	12,855	173,076
LIQUOR STORES	8,313	756	15,898	1,280	26,247
RESTAURANTS	141,268	0	13,509	35,383	190,160
DRUG STORES	9,662	0	0	0	9,662
FURNITURE/APPLIANCES	177,275	1,872	0	21,515	200,662
BUILDING MATERIALS	71,845	0	0	25,695	97,540
CAR DEALERS/SUPPLIES	234,911	0	0	83,906	318,817
SERVICE STATIONS	42,585	0	0	16,257	58,842
BUSINESS & REPAIR	338,174	5,040	25,463	90,405	459,082
INDUSTRIAL	48,880	0	0	277,770	326,650
Total	1,348,720	10,746	139,889	569,371	2,068,726

* The aggregate sales tax information for Oakland is from the State Board of Equalization's Annual Report for 1989.

♦ Sales information is from the State Board of Equalization, 1989.

How do San Antonio residents perceive their local shopping areas?

The perceptions of residents were initially explored through the Coro interviews. Later the consumer survey used the information gained from the interviews to develop a questionnaire. By finding out the opinion of residents and their concerns, a revitalization action plan can prioritize the problems and allocate resources accordingly.

Some of the people interviewed by the Coro Fellows felt that the heavy concentration of alcohol and substance abuse rehabilitation programs has been a significant obstacle to San Antonio's commercial development potential: "These respondents fear the abundance of rehabilitation programs is interpreted as a sign of a crime-ridden community, thereby deterring people from living, working, or shopping in the area." These type of social service organizations are primarily found along E.14th Street and 23rd Avenue.

By contrast, other interviewees expressed exactly the opposite. They felt that the existing programs have not met the increasing need, specially over the last ten years. As quoted in the report, one person stated, "If San Antonio is to overcome the bad rap it gets from the outside, it has to begin by taking care of its own. Once the community gets cleaned up, people will begin to feel more comfortable and safe, and eventually some will move in, set up a business or at least shop more often in the area."

Still other community groups, like the Brooklyn Neighborhood Preservation Association, have taken the initiative to address the problem of alcohol abuse by protesting against the selling of liquor at local stores. However, store owners argue that "liquor sales make up much of their business, and doing so will force them to close down."

According to the Oakland Police Department, about 15 percent of the city's 100 worst drug dealing spots are in the San Antonio-Fruitvale area. Civic leaders are calling for a cooperative effort to deal with this problem by involving local businesses and churches. The organization *Volunteers of America* has tried one approach by contributing \$50,000 towards anti-drug community efforts on 23rd Avenue. Burglary is also another major concern. But despite the expressed concerns of residents, previous attempts to organize neighborhood and merchant crime watch programs have not been very successful.

People involved in development activities were of the general opinion that "the District's commercial activity is improving and should continue to be encouraged, while obstacles to revitalization need to be removed." One of the main recommendations that continually emerges is a rezoning of the district to prevent scattered development and encourage

commercial nodes more amenable to pedestrian traffic.

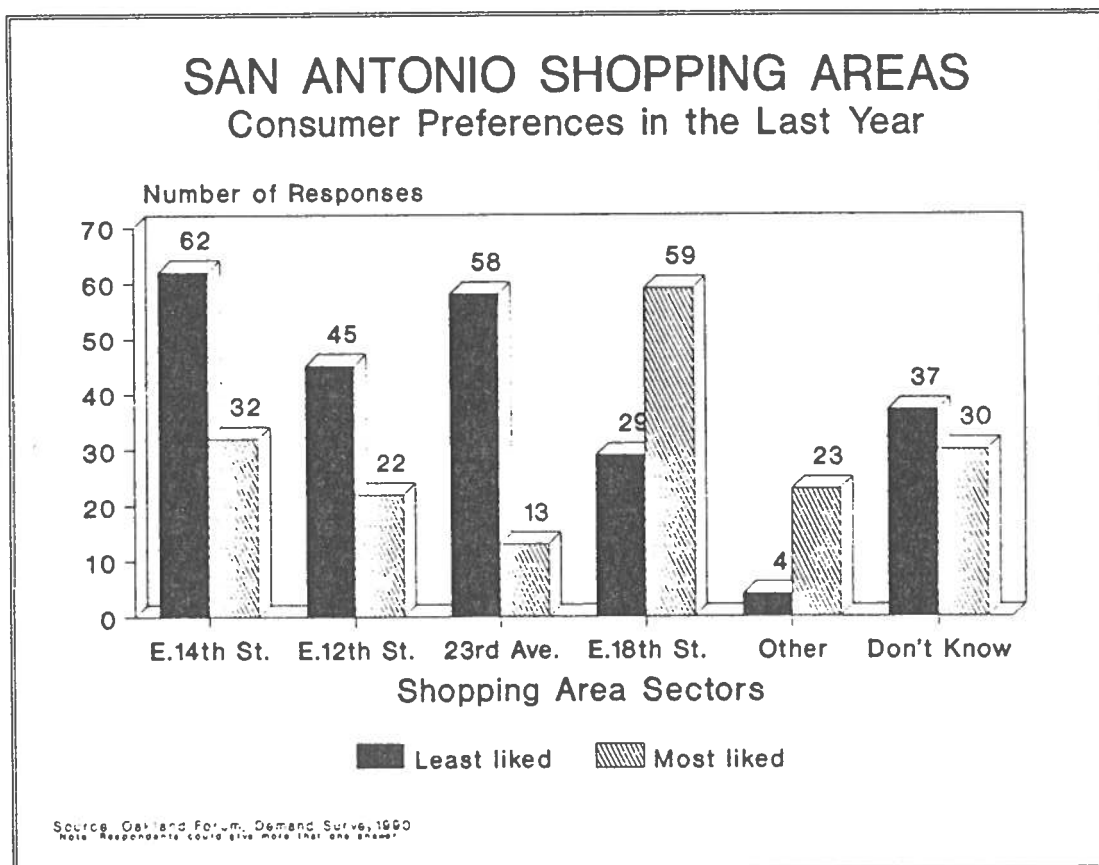
The survey took a closer look at the areas of E.12th and E.14th Streets, and the categories that received the worst ratings in E.14th also received the same ratings for E.12th Street. The three most serious problems in this ranking order were **Attractiveness of the Area**, **Safety of the Neighborhood**, and **Appearance of Stores**. Conversely, level of concerns were measured in a scale from "not important" to "extremely important." The top concerns were **Safety**, **Area** and **Quality of Merchandise**. Note that store appearance was not one of the top concerns. Understandably, consumers are more concerned with the area in general than with particular stores. Obviously the individual consumer's perspective overlooks the fact that often times improving the appearance of an entire block requires the collective individual efforts of many store owners.

Safety was a primary concern and a recurring theme throughout the survey results. This is reinforced by the fact that 40 percent of respondents rated the safety of E.14th's neighborhood as poor. In the case of E.12 Street, close to 35 percent were not familiar enough with the area to make a judgement. The two unfavorable rankings, 'fair' and 'poor', account for 52 percent of the responses. It is worth noting that based on some narrative responses, even those people who were not familiar with a particular area shared the same perceptions as residents who shopped there regularly.

Ethnicity was found to have some relationship to the particular shopping areas the residents least liked or most liked to shop. For example, a statistical uncertainty coefficient reveals that "knowing the ethnicity of a person can explain 11 percent of that individual's preference for a particular shopping area in San Antonio. In the case of least-preferred it can only explain 8 pct." While both relationships are weak, the ethnic group percentages clearly show that Asians prefer to shop in other areas outside San Antonio. Whites and Blacks prefer East 18th Street, which on the average is the most popular across all races (the remaining categories include Native Americans and Others). Hispanics seem to prefer East 14th Street although it's hard to affirm with certainty given their low numbers in the survey. The second largest percentage of Blacks also liked to shop in other areas outside San Antonio.

In order to contrast the preference of all respondents towards the four different areas, a graphic chart was designed where both responses are shown together (least-liked vs. most-liked). See figure 3 below. From the survey analysis we learn that one can easily observe the sharp contrast between the negative (58) and positive (13) ratings of the 23rd Avenue area. E.14th Street has a slightly higher count of negative responses (62), but the very few number of positive responses for 23rd Avenue make it the least desirable of all areas. "The narrative responses to this question also categorized 23rd Avenue as the toughest neighborhood. On the opposite end of San Antonio, E.18th/Park Blvd is the preferred area by far" (Survey Analysis, 1990).

Figure 3



Significant relationships were found between overall satisfaction levels for E.14th Street and age of respondents. The older the respondents, the **less** satisfied they were with the area. Similarly, overall concern for E.12th Street was also related with age, except in this case older respondents were **more** concerned about the area. See Appendix B-2 for more information.

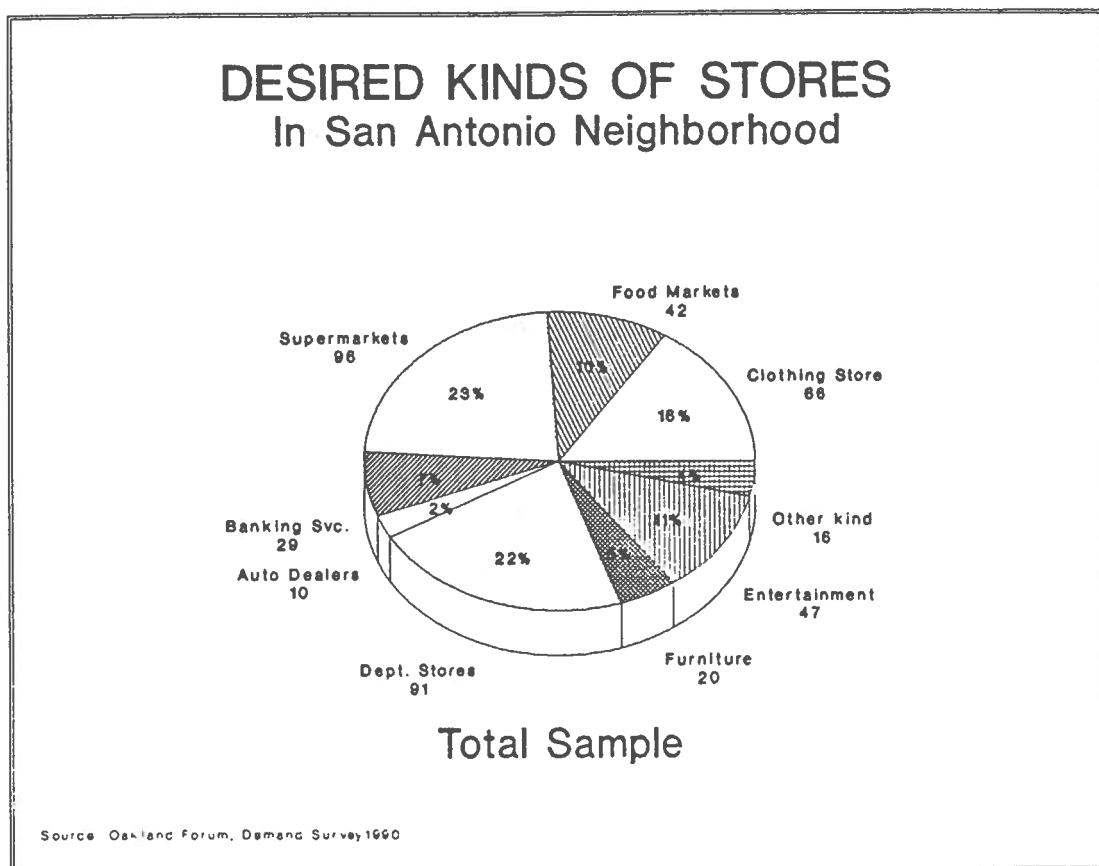
What Retail Activities are desired and feasible in San Antonio?

In attempting to decide what kind of retail businesses should be attracted to the area it was equally important to address both desirability and feasibility. Analyzing the quantity of needed commercial space leads to conclusions about the feasibility of a project but if the neighbors do not care for that particular type of store the success of the enterprise may be questionable. Likewise, the residents may have a strong desire for a shopping mall but their income and population may not support such a large retail center. In this respect the different reports complement one another effectively.

In the Coro report some suggestions were made for the revitalization of the commercial areas by targeting mixed-use development for East 14th Street, to provide much needed retail services supported by residential units. Moreover, the emphasis on affordable housing would help to preserve the character of the neighborhood and impede gentrification of the area.

Figure 4 below shows the most desired kind of stores in the neighborhood based on the survey results. Supermarkets and department stores came out as the most frequent choices (23% and 22% respectively), with clothing stores trailing at 16 percent. Other findings are consistent with figure 4; for example, as seen before the majority of respondents state that they spend the greatest amount of money in supermarkets instead of local food stores. Also, the individual preferences for clothing store type are those located inside department stores. In reference to entertainment businesses, video clubs seem like a natural choice given the wide usage of VCR movies (27% for preferred type of entertainment).

Figure 4



The feasibility aspects are more appropriately addressed by the aggregate demand analysis. The study concludes that "not all the most desired kinds of stores (figure 4) may be supported for development in the commercial areas. The analysis demonstrated four types of goods and services that should be targeted for development in San Antonio and Fruitvale. The four categories which may be targeted for increased space are" :

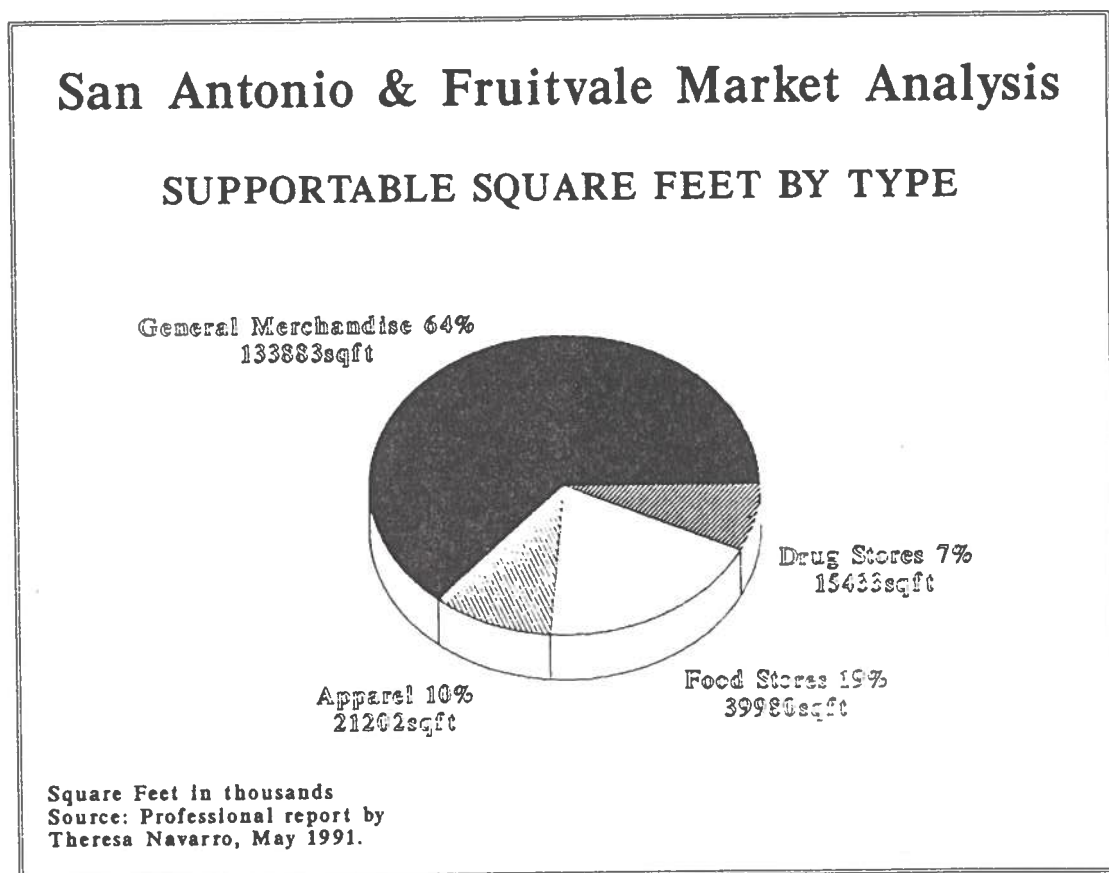
- * general merchandise at 133,883 square feet;
- * food stores at 39,980 square feet (mostly food at home items);
- * apparel at 21,202 square feet; and
- * drug stores at 15,443 square feet.

These conclusions were arrived at by comparing the income levels of residents in the area with the total capturable sales by square feet. We are thus able to see which retail uses

should be generating more sales, thereby providing us with the types of uses by square feet that can be supported by the surrounding population.

Given the sales leakage information from figure 3, and the supportable square footage projected for each item, the placement of these types of stores in San Antonio and Fruitvale is probably best met with the combination of these items: food stores, drug stores, and general merchandise with limited apparel items.

Figure 5



ISSUES IN INTERPRETING THE AGGREGATE SALES DATA

The information in the aggregate sales data needs to be understood in the context of how businesses operate. In other words, the study is based on aggregate measures which cannot tell us about the viability of individual businesses. Furthermore, some businesses are more dependent on a regional consumer base than others.

Expenses per Retail Category

The shopping expenditures revealed by the consumer survey serve to validate the assumptions made in the aggregate demand analysis about how much people spend for different types of items. Taking the most conservative estimate from the survey responses, the dollar amounts used in the aggregate analysis are shown to be reasonable. Therefore, the conclusions about the number of square feet that can be supported is at least as high as those found in the Aggregate Demand study. See maps 1 through 4 for a graphic display of spending patterns.

Liquor Sales

Even though the sale of liquor draws largely from a regional base, the actual sales represent a small amount when compared with the rest of the sales volume conducted in the area. Whether or not an individual store may be affected seriously by a fluctuation in liquor sales cannot be determined from this analysis.

Regional Businesses

It is important to differentiate further between regional and local businesses. It has been clearly stated that used car lots draw customers from all across the Bay area. On the other hand, around 90% of the survey respondents said that they shop for cars outside the district. Essentially this does not change the conclusions but points out that the regional base of this category is much larger than originally assumed by the aggregate demand method. This is consistent with the complexities of the modern marketplace where consumers have so many options available.

CONCLUSIONS

Both the consumer survey and the aggregate demand analysis demonstrate that the spending capacity of San Antonio residents is greater than what is shown by current patronage of businesses in the area. What was consistently found in all three reports is that residents are going outside the district to purchase a large number of goods.

Overall, the residents think poorly about both the attractiveness of the commercial areas in general and the appearance of individual stores. However, what is most important is the perception that the commercial strips do not offer a safe environment to shop. This perception is mainly based on the actual crime rates for some areas, such as 23rd Avenue. However, although the crime rate may not be as high in every area, the reputation permeates the entire neighborhood and transcends rational measurement of these differences. In addition to the safety issues, the low quality of products and the attractiveness of the commercial areas are also mentioned as major concerns. The conclusions of the survey were that "if the goal of attracting new customers is to be successful, something needs to be done about the safety of the neighborhood, the quality of the products, and the attractiveness of the area. All other concerns would help if improved, but they are secondary."

The study shows that of the retail activity that does take place within the district, most of it occurs on East 14th Street. Although the data from the demand analysis did not include the corner of E.18th and Park Blvd., the responses from the survey indicate that residents go there to shop for food. There is plenty of competition from the surrounding areas but mainly Downtown Chinatown and Downtown proper, Lakeshore, Eastmont Mall, and Dimond District attract the most customers.

The opinions solicited by the Coro Fellows and the commercial characteristics preferred by the survey respondents suggest that businesses need to be less scattered. This would encourage foot traffic and thus offer convenience and a greater variety of products per area by having different types of stores in close proximity.

This also implies that the area needs some retail anchors and not merely an added number of small stores. The type of uses that may be supported are general merchandise, food stores, apparel, and drug stores. Given the larger size of supermarkets nowadays, the supportable commercial space (39,000 square feet) only justifies one supermarket.

RECOMMENDATIONS

Given the desire and the real expenditure availability of the trade area some recommendations to be considered are:

- 1) the development of a superstore that incorporates general merchandise, a supermarket, a drug store, and a minimal amount of space for apparel uses;
- 2) a review of all vacant uses in the commercial areas that may possibly be incorporated for this type of use, preferably at an intersection that is accessible to major highways;
- 3) given the strong competition from the area of E.18th/Park Blvd. and Lakeshore, the location of a new supermarket should be around the east end of 14th Street in San Antonio or the west end of the Fruitvale district. This would also attract more customers from Fruitvale and take advantage of its proximity to highway I-880.
- 4) a program that focuses on improving the safety of pedestrians and users along the commercial areas such as improved lighting for night time use and the presence of more police protection (maybe more foot patrols);
- 5) a capital improvement program to assist commercial property owners to undertake facade improvements and the standardization of commercial signs;
- 6) concurrently, work on the request for rezoning of the district. Downzone the area to C-35 and encourage the formation of commercial nodes along the shopping areas.
- 7) using a triage approach, such a program should begin with E.14th Street. It should also involve an extensive media campaign.

Based on previous studies of the regulatory environment in San Antonio, a rezoning of the area is recommended. As is stands right now, the existing C-40 zone does not require

design review. Implementation of design review criteria would add the necessary uniformity necessary to aid revitalization efforts. The basic proposition is that except for a few key intersections, the strips would be downzoned to prevent scattered commercial development. The key intersections would then become clustered centers of commercial activity. Two previous studies conclude that development should be encouraged along East 14th Street (Coro report and the Fruitvale studio). The former includes the New Asiatown area, around 25th Avenue, and where East 14th intersects with 8th and 14th Avenues; the latter recommends commercial thoroughfares at East 14th between Fruitvale and 38th Avenues, and the Fruitvale-Foothill intersection. By creating commercial nodes, stores would be supporting one another and foot traffic would be encouraged. There is also a proposed zoning ordinance (C-32) in the Fruitvale report, "A Neighborhood Revitalization Plan," Oakland Forum, March 1991.

According to the license plate and consumer surveys the New Asiatown is not drawing many outside customers. To take full advantage of its potential, the merchants should take heed of what has made Chinatown successful. Emphasize specialty stores and play up the availability of Asian gourmet products that may not be found anywhere else.

The challenges to turn around 23rd Avenue is going to require a lot more resources and a simultaneous top-bottom approach. Residents need to make the case for increased police presence but may also need to organize in order to get rid of drug dealing tenants--maybe using tactics like the ones taught by the Drug Abatement Institute (Safe Streets Now program). Given the geographical isolation of this commercial strip, its clientele could best be served by maintaining a local market and serving the immediate trade area as defined by a half-mile corridor on either side of 23rd Avenue. Eventually pedestrian traffic may reappear if the safety of the neighborhood improves considerably.

In the final analysis, East 14th is the commercial strip with most potential for large scale retail and ought to be the target for new retail anchor space. Improving this area first should produce the greatest benefits for the entire San Antonio neighborhood.

APPENDICES

- A -- Methods in Preliminary Studies of San Antonio's
Commercial Climate
 - 1) Commercial inventory
 - 2) License plate survey
- B -- Consumer Demand Survey
 - 1) Methodology
 - 2) Summary tables
 - 3) Supplementary computer-generated maps
- C -- Aggregate Demand Analysis Methodology

Commercial Inventory ⁶

The first two weeks of this effort were spent on an inventory of the commercial strips. The inventory identified what retail services exist and estimated the square footage occupied by various types of retail services.

The Method

The first step in conducting the inventory was to obtain a listing of all registered businesses in the *Business Prospector*, a subscription service available at the Alameda County Business Library. The retail listing was then used to guide the field inventory, conducted in January 1990 by the five Coro Fellows. Building were paced, measurements and facade observations were recorded, then entered into a LotusTM database. Categories of analysis, based on similar City of Oakland inventories, consisted of a block code; business name; address; retail classification according to the Standard Industrial Code (SIC) and according to OEDE classifications; width, depth, and number of stories; total square feet; number of employees (based on SIC codes); and observations on signage, facade, etc.

License plate survey

To measure San Antonio's market potential, the Coro Fellows conducted a license plate survey. This survey estimates the District's trade area, defined as the area from which San Antonio businesses are likely to draw the bulk of their customers. The purpose of defining a trade area is to establish a geographic area within which shopping patterns and demographic characteristics can be studied. In addition, it is important for the planning process, in that it helps to put in perspective what types of businesses can survive in this commercial area.

The Method

License plate surveys were taken to determine the zip codes where customers originate. Plates were recorded at each of the study areas on both a weekday and a weekend. Each survey area included around 100-150 license plates. Commercial license plates were excluded, as were obvious residential on-street cars. OEDE then forwarded license plate numbers to the Department of Motor Vehicles, which in turn, supplied registered zip codes of origin for each plate. These were tabulated and plotted on East Bay zip code maps. All license plates from outside of the East Bay region were excluded from the tally.

It is important to remember, however, that although license plate surveys are standard procedure when determining the market potential of an area, they do not take into account customers who walk or use public transportation. Furthermore, license plate surveys do not

⁶ Taken from *Dialogue and Development in San Antonio*, a report prepared by Coro Foundation Fellows, March 1990.

allow for inconsistencies in registration. Many automobiles are registered to persons other than the person driving. And many people do not change the address of their automobile registration each time they move. Yet another limiting factor is that zip code encompass large areas, which makes it difficult to determine whether or not traffic is coming from inside or outside of the District. Nevertheless, these surveys are an efficient way to quickly identify the trade area of a commercial district.

Consumer Demand Survey ⁷

To address the problem of commercial development and identify the intervening factors a consumer demand study was designed. The instrument is a one-shot cross-sectional survey containing forty sets of questions. The questions attempt to discover consumer buying habits such as where a household purchases different items, which particular stores are chosen for various needs and why, and what is the respondents' household economic background.

Sampling Method

A random sample was necessary to obtain full representation of the entire San Antonio residential population. The San Antonio District covers four zip codes, three of which are only partially in the district. Therefore, households outside the district were identified and ruled out, after which an estimate of the entire residential population was determined. The San Antonio population was approximately 45,000. A sample size of 400 cases was necessary to obtain a reasonable margin of error with a 90 percent confidence interval. For a projected response rate of 50 percent, 800 surveys were distributed.

Under the assumption that most households had a telephone, this random sample was taken from a reverse phone directory. A reverse directory lists household phone numbers alphabetically by street address with zip codes indicated. Although there may be a slight selective bias against low-income groups, the staff was assured by residents of San Antonio and counselors of the Berkeley Asian Youth Center (BAYC) that those cases were minimal among the high number of Asian households.

The random sample was chosen by dividing the estimated residential population of San Antonio (6400) by the 800 surveys to be distributed. By this calculation, every 8th household listed in the directory was selected. An additional 160 households were chosen for a back-up list by the same method.

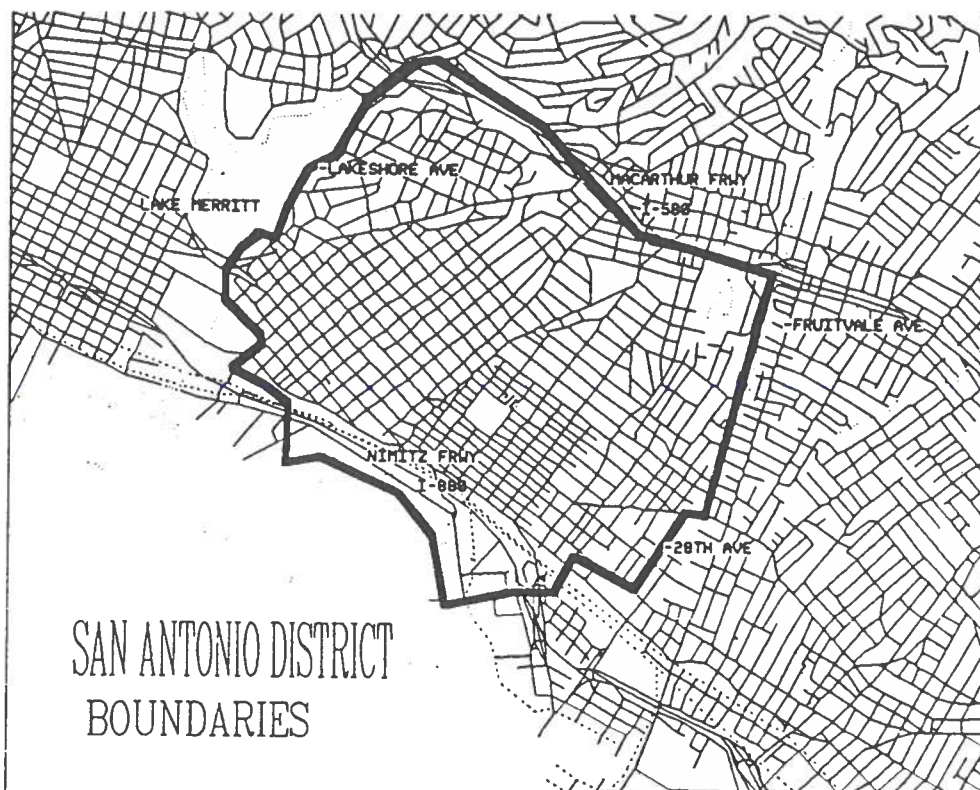
Survey Administration

The Oakland Forum with the help of the Berkeley Asian Youth Center (BAYC) surveyed 795 residents of San Antonio. Almost three-quarters of the total were conducted door-to-door with multilingual questionnaires (English, Spanish, Cambodian, Chinese, Laotian, and Vietnamese)--with the total number of responses reaching 221 cases.⁸ The projected response rate proved to be too optimistic. After accounting for vacancies and non-residential uses (60), the proportion of returned surveys is calculated at 30 percent (30.1%). Despite the low response rate, the distribution of cases by race and income suggests that it is a fairly representative sample.

⁷ Taken from *Proposal for a San Antonio Consumer Demand Study*, prepared by T.Navarro, D.Lee, and J.Watts, May 1990.

⁸ Final tally obtained by Katrina A. Koh, *Building a Community Survey*, professional report submitted in the Spring 1991.

Please answer as many questions as you can. The survey should take no more than 15 minutes. Your responses will be kept strictly confidential. We would first like to ask you some questions about your individual shopping needs, and how well they are being served. Please note questions number 1 to 12 concern only yourself, questions number 13 to 24 concern shopping for your household - the people with whom you live.



As shown on the map, the San Antonio district is located between Lake Merritt and 28th Avenue, and between the Nimitz and MacArthur Freeways.

1. What kinds of stores would you like to see more of in your neighborhood?

(Check the boxes for the TWO types of stores that you feel are most needed)

- ☐ 1 CLOTHING STORES
- ☐ 2 SMALL FOOD MARKETS
- ☐ 3 SUPERMARKETS
- ☐ 4 BANKING SERVICES
- ☐ 5 DEPARTMENT STORES

- ☐ 6 AUTO DEALERS
- ☐ 7 FURNITURE
- ☐ 8 ENTERTAINMENT
- ☐ 9 OTHER (PLEASE DESCRIBE)

2. What kinds of entertainment have you done in the last week? (Check all boxes that apply)

- ☐ 1 VIDEO MOVIES (VCR) AT HOME
- ☐ 2 GONE TO MOVIE THEATER
- ☐ 3 READ BOOKS/MAGAZINES
- ☐ 4 PLAYED SPORTS

- ☐ 5 GONE TO BARS/DISCOS
- ☐ 6 OTHER (PLEASE DESCRIBE)

3. How much do you spend on entertainment weekly on the average? (Check one box only)

- ☐ 1 LESS THAN \$10
- ☐ 2 \$10 to \$25

- ☐ 3 \$26 to \$50
- ☐ 4 OVER \$50

4. Where do you generally use services such as haircutters and cleaners? (See map on page 1 for the location of San Antonio, check box for your answer)
- ☐1 WITHIN SAN ANTONIO ☐2 OUTSIDE SAN ANTONIO
5. How many restaurant or fast food meals did you eat during the last week? (Check one box only)
- ☐1 None ☐3 3 or 4
☐2 1 or 2 ☐4 More than 4
6. Where do you more often eat restaurant or fast food meals? (Check one box only)
- ☐1 WITHIN SAN ANTONIO ☐2 OUTSIDE SAN ANTONIO
7. How much do you spend each MONTH on clothes for yourself on average? (Check one box only)
- ☐1 Less than \$25 ☐3 \$51 to \$75
☐2 \$26 to \$50 ☐4 Over \$75
8. Please use the map on the next page and check the number for the shopping areas where you spent the greatest amount of money on clothes during the last year. (Check ONE choice in each column)

IN SAN ANTONIO

The Greatest Amount
of Money on Clothes

- ☐1 EAST 14TH STREET
☐2 EAST 12TH STREET/NEW ASIATOWN
☐3 23RD AVENUE
☐4 EAST 18TH STREET
☐5 OTHER (PLEASE DESCRIBE)

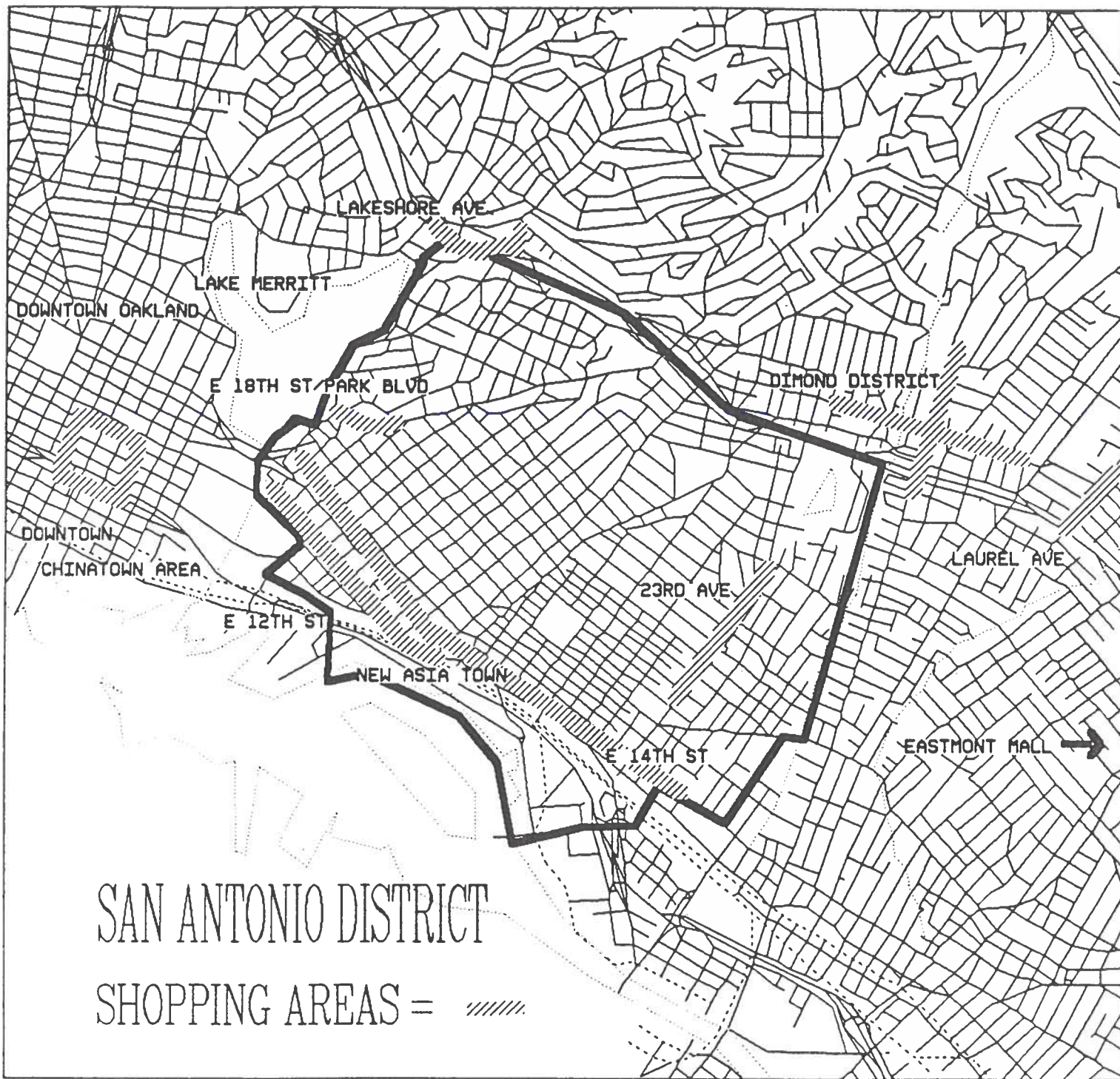
☐6 DONT KNOW

OUTSIDE SAN ANTONIO BUT IN OAKLAND

The Greatest Amount
of Money on Clothes

- ☐1 LAKESHORE AVENUE
☐2 DOWNTOWN CHINATOWN AREA
☐3 DIMOND DISTRICT
☐4 DOWNTOWN OAKLAND
☐5 EASTMONT MALL
☐6 LAUREL AVENUE
☐7 OTHER (PLEASE DESCRIBE)

☐8 DONT KNOW



9. At what types of stores do you usually buy your clothes for yourself? (Check all boxes that apply)

- ☐ 1 SMALL BOUTIQUE
- ☐ 2 THRIFT SHOP
- ☐ 3 DISCOUNT STORES
- ☐ 4 DEPARTMENT STORES (MERVYN'S, MACY'S, EMPORIUM, ETC.)
- ☐ 5 OTHER (PLEASE DESCRIBE) _____

Next we would like to ask you about your financial service needs.

10. Do you use a bank, savings and loan, or credit union? (Check one box only)
☐1 YES (GO TO QUESTION 11) ☐2 NO (GO TO QUESTION 14)

11. Where is the bank, savings and loan, or credit union you use most frequently? (Check one box only)
☐1 WITHIN SAN ANTONIO ☐3 OUTSIDE OAKLAND
☐2 OUTSIDE SAN ANTONIO BUT IN OAKLAND

12. Do you have a Savings Account? (Check one box only)
☐1 YES ☐2 NO

13. Do you have a Checking Account? (Check one box only)
☐1 YES ☐2 NO

We would now like you to answer some questions for your household, the people with whom you live and share food. Our first questions are about food. Please think back over your household's food shopping last week. If you cannot remember last week, answer for what your household does normally.

14. Where did your household spend money on food last week? Please refer to the San Antonio map of different commercial areas on page 4 and INDICATE WHERE your household spent the greatest amount of money on food. (Check only ONE choice in each column)

IN SAN ANTONIO

The Greatest Amount
of Money on Food

- ☐1 EAST 14TH STREET
☐2 EAST 12TH STREET/NEW ASIATOWN
☐3 23RD AVENUE
☐4 EAST 18TH STREET
☐5 OTHER (PLEASE DESCRIBE)

☐6 DONT KNOW

OUTSIDE SAN ANTONIO BUT IN OAKLAND

The Greatest Amount
of Money on Food

- ☐1 LAKESHORE AVENUE
☐2 DOWNTOWN CHINATOWN AREA
☐3 DOWNTOWN OAKLAND
☐4 DIMOND DISTRICT
☐5 EASTMONT MALL
☐6 LAUREL AVENUE
☐7 OTHER (PLEASE DESCRIBE)

☐8 DONT KNOW

15. How would you rate the one shopping area where your household spent the greatest amount of money for food?
(Please check ONE box for each row)

Shopping Area Name: _____

	Poor	Fair	Good	Very Good	Can't Say
a. Bus Access	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
b. Safety of Neighborhood	☐	☐	☐	☐	☐
c. Parking Availability	☐	☐	☐	☐	☐
d. Quality of Merchandise	☐	☐	☐	☐	☐
e. Distance to other stores	☐	☐	☐	☐	☐
f. Prices	☐	☐	☐	☐	☐

16. At what kind of store does your household tend to spend the most amount of money for food? (Check one box only)

☐ 1 SMALL GROCERY STORE/
LOCAL GROCERY STORE

☐ 2 SUPERMARKET
(e.g. LUCKY'S, SAFEWAY)

17. How did the main food shopper in your household get to the store where he or she bought the most food during the last week? (Check all boxes that apply)

☐ 1 WALKING

☐ 2 BY OWN CAR

☐ 3 SHARED RIDE IN SOMEONE ELSE'S CAR

☐ 4 BY BUS

☐ 5 OTHER (PLEASE DESCRIBE):

18. How much does your household spend WEEKLY on grocery food? (Check one box only)

☐ 1 Less than \$25

☐ 2 \$26 to \$50

☐ 3 \$51 to \$100

☐ 4 Over \$100

Now we would like to ask you questions about appliances and large items your household buys.

19. Where did your household buy furniture most recently? (Remember the map of San Antonio is on page 3)
(Check one box only)

☐ 1 WITHIN SAN ANTONIO

☐ 2 OUTSIDE SAN ANTONIO BUT IN OAKLAND

☐ 3 OUTSIDE OAKLAND

20. Does your household have a car? (Check one box only)

☐ 1 YES (ANSWER QUESTIONS 21 AND 22)

☐ 2 NO (GO TO QUESTION 23)

21. If you have a car where do you USUALLY buy gasoline? (Check one box only)

☐ 1 WITHIN SAN ANTONIO

☐ 2 OUTSIDE SAN ANTONIO BUT IN OAKLAND

☐ 3 OUTSIDE OAKLAND

22. Where did your household buy its current car? (Check one box only)

☐ 1 WITHIN SAN ANTONIO

☐ 2 OUTSIDE SAN ANTONIO BUT IN OAKLAND

☐ 3 OUTSIDE OAKLAND

23. Does your household own a television? (Check one box only)

☐ 1 YES (ANSWER QUESTIONS 24)

☐ 2 NO (GO TO QUESTION 25)

- 2 4 . Where did your household buy its current television? (Check one box only)
- ☐¹ WITHIN SAN ANTONIO ☐³ OUTSIDE OAKLAND
- ☐² OUTSIDE SAN ANTONIO BUT IN OAKLAND

Now we would like to ask you questions about the shopping environment in San Antonio.

- 2 5 . Think back to the shopping you have done in San Antonio in the last year. Please use the map on page 3 and check where you least like to shop and most like to shop in San Antonio. (Check only ONE choice in each column)

Least Like to Shop

☐¹

☐²

☐³

☐⁴

☐⁵

☐⁶

Most Like to shop

☐¹

☐²

☐³

☐⁴

☐⁵

☐⁶

EAST 14TH STREET

EAST 12TH STREET/NEW ASIATOWN

23RD AVENUE

EAST 18TH STREET

OTHER (PLEASE DESCRIBE)

DONT KNOW

- 25a. What do you like and dislike most about the two areas you checked?

Like

Dislike

- 2 6 . To the best of your knowledge, how would you rate the EAST 14TH STREET shopping area in San Antonio? (Please use the map on page 3 for the location of EAST 14TH STREET. Check only ONE choice in each row)

	Poor	Fair	Good	Very Good	Can't Say
a. Availability of Goods	☐ ¹	☐ ²	☐ ³	☐ ⁴	☐ ⁵
b. Quality of Merchandise	☐	☐	☐	☐	☐
c. Prices	☐	☐	☐	☐	☐
d. Availability of Parking	☐	☐	☐	☐	☐
e. Bus Access	☐	☐	☐	☐	☐
f. Distance to other Stores	☐	☐	☐	☐	☐
g. Safety of Neighborhood	☐	☐	☐	☐	☐
h. Physical Appearance of Stores	☐	☐	☐	☐	☐
i. Attractiveness of Area	☐	☐	☐	☐	☐

27. We are interested in changes that can be made in the EAST 14TH STREET shopping area. How would you rate the following changes in terms of importance in this area? (Check only ONE choice in each row)

	Not Very Important	Somewhat Important	Very Important	Extremely Important	Can't Say
a. Improve Safety of Neighborhood	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
b. Improve Physical Appearance of Stores	☐	☐	☐	☐	☐
c. Improve Availability of Goods	☐	☐	☐	☐	☐
d. Better Quality of Merchandise	☐	☐	☐	☐	☐
e. More Parking	☐	☐	☐	☐	☐
f. Improve Attractiveness of Area	☐	☐	☐	☐	☐
g. Less Distance to Other Stores	☐	☐	☐	☐	☐
h. Improve Bus Access	☐	☐	☐	☐	☐

28. To the best of your knowledge, how would you rate the EAST 12TH STREET/ NEW ASIA TOWN shopping area in San Antonio? (Please use the map on page 3 for the location of the EAST 12TH STREET/NEW ASIA TOWN area. Check only ONE choice in each row)

	Poor	Fair	Good	Very Good	Can't Say
a. Availability of Goods	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
b. Quality of Merchandise	☐	☐	☐	☐	☐
c. Prices	☐	☐	☐	☐	☐
d. Availability of Parking	☐	☐	☐	☐	☐
e. Bus Access	☐	☐	☐	☐	☐
f. Distance to other Stores	☐	☐	☐	☐	☐
g. Safety of Neighborhood	☐	☐	☐	☐	☐
h. Physical Appearance of Stores	☐	☐	☐	☐	☐
i. Attractiveness of Area	☐	☐	☐	☐	☐

29. We are interested in changes that can be made in the EAST 12TH STREET/NEW ASIA TOWN shopping area. How would you rate the following changes in terms of importance in this area? (Check only ONE choice in each row)

	Not Very Important	Somewhat Important	Very Important	Extremely Important	Can't Say
a. Improve Safety of Neighborhood	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
b. Improve Physical Appearance of Stores	☐	☐	☐	☐	☐
c. Improve Availability of Goods	☐	☐	☐	☐	☐
d. Better Quality of Merchandise	☐	☐	☐	☐	☐
e. More Parking	☐	☐	☐	☐	☐
f. Improve Attractiveness of Area	☐	☐	☐	☐	☐
g. Less Distance to Other Stores	☐	☐	☐	☐	☐
h. Improve Bus Access	☐	☐	☐	☐	☐

30. Do you find it difficult to communicate with store owners in your language? (Check box)

☐1 YES, VERY OFTEN
☐2 SOMETIMES

☐3 NEVER OR ALMOST NEVER

Finally, we would like to ask you questions about yourself to help us understand the survey results.

31. Your Sex (Check box)

☐1 MALE

☐2 FEMALE

32. What is your present marital status? (Check box)

☐1 SINGLE (NEVER MARRIED)

☐4 SEPARATED

☐2 MARRIED

☐5 WIDOWED

☐3 DIVORCED

33. Do you rent or own your present residence? (Check box)

☐1 RENT

☐2 OWN

34. How many years have you lived in the San Antonio area of Oakland? (Check box)

☐1 LESS THAN ONE YEAR

☐3 FOUR TO SEVEN YEARS

☐2 ONE TO THREE YEARS

☐4 OVER SEVEN YEARS

35. How many people live in your household? _____

36. Your age? _____

37. Of what ethnic group do you consider yourself to be a member? (Check box)

☐1 WHITE (EUROPEAN DESCENT)

☐4 ASIAN (PLEASE SPECIFY) _____

☐2 AFRICAN-AMERICAN OR BLACK

☐3 LATINO OR HISPANIC (PLEASE SPECIFY) _____

☐5 NATIVE AMERICAN (AMERICAN INDIAN) _____

☐6 OTHER (PLEASE SPECIFY) _____

38. If you are employed or self-employed, where do you work? (Check box)

☐1 WITHIN SAN ANTONIO

☐3 OUTSIDE OAKLAND

☐2 OUTSIDE SAN ANTONIO BUT IN OAKLAND

☐4 NOT WORKING

39. What was your total household income before taxes in 1989? (Check box)

☐1 LESS THAN \$10,000

☐4 30,000 TO 39,999

☐2 10,000 TO 19,999

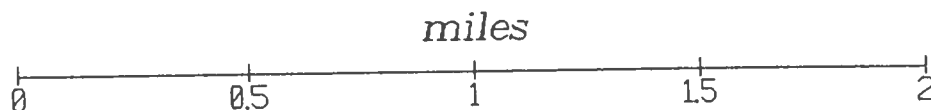
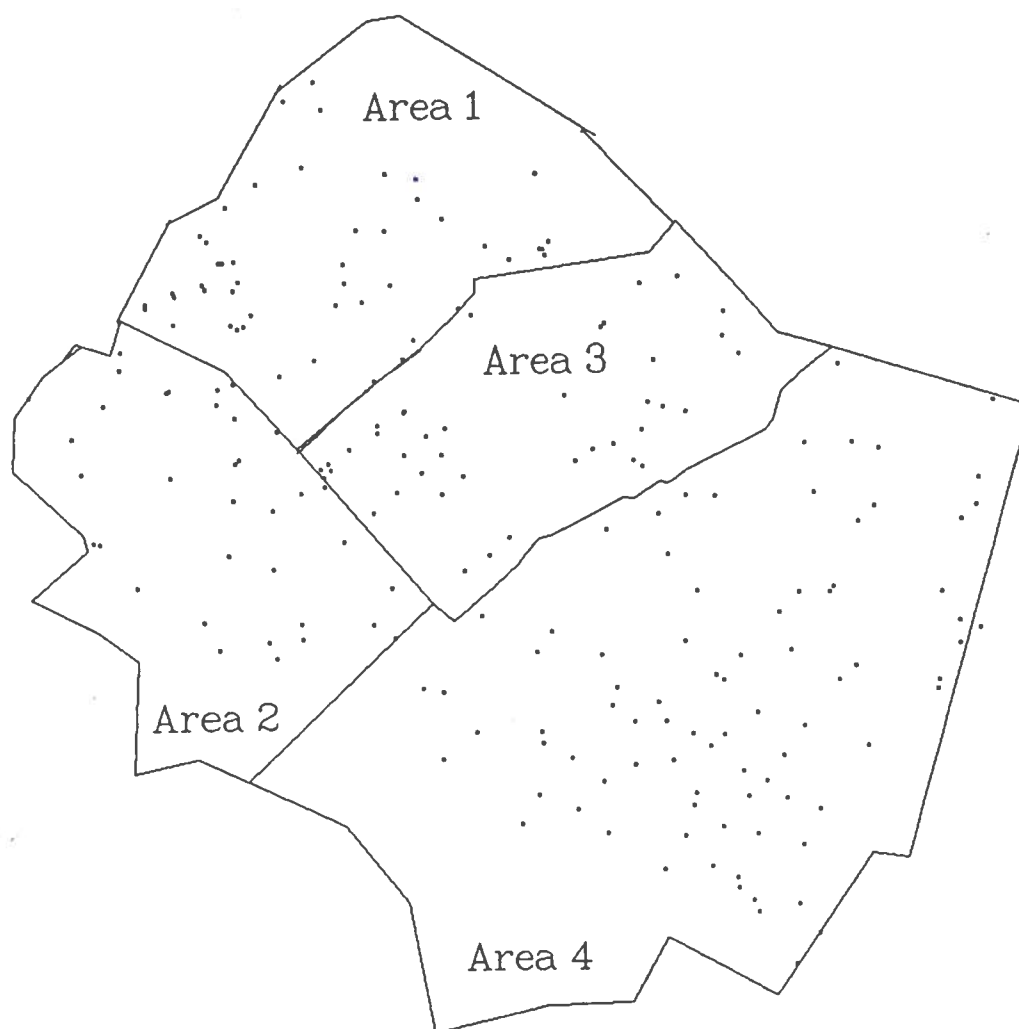
☐5 40,000 TO 49,999

☐3 20,000 TO 29,999

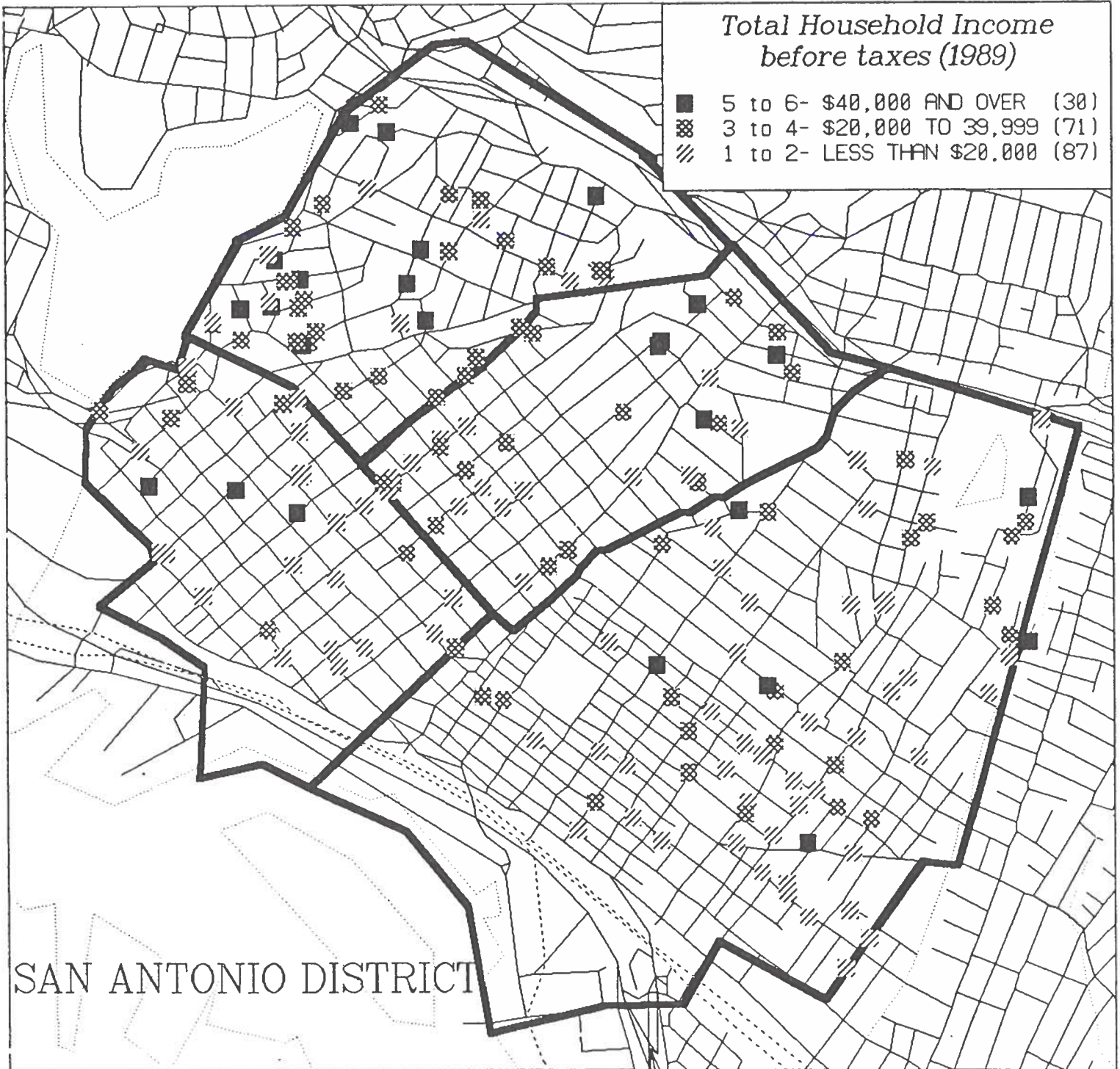
☐6 OVER \$50,000

Thank you for your time in completing this important survey. We greatly appreciate your help. If you would like a summary of the results from this survey, please print your name and address on the attached envelope.

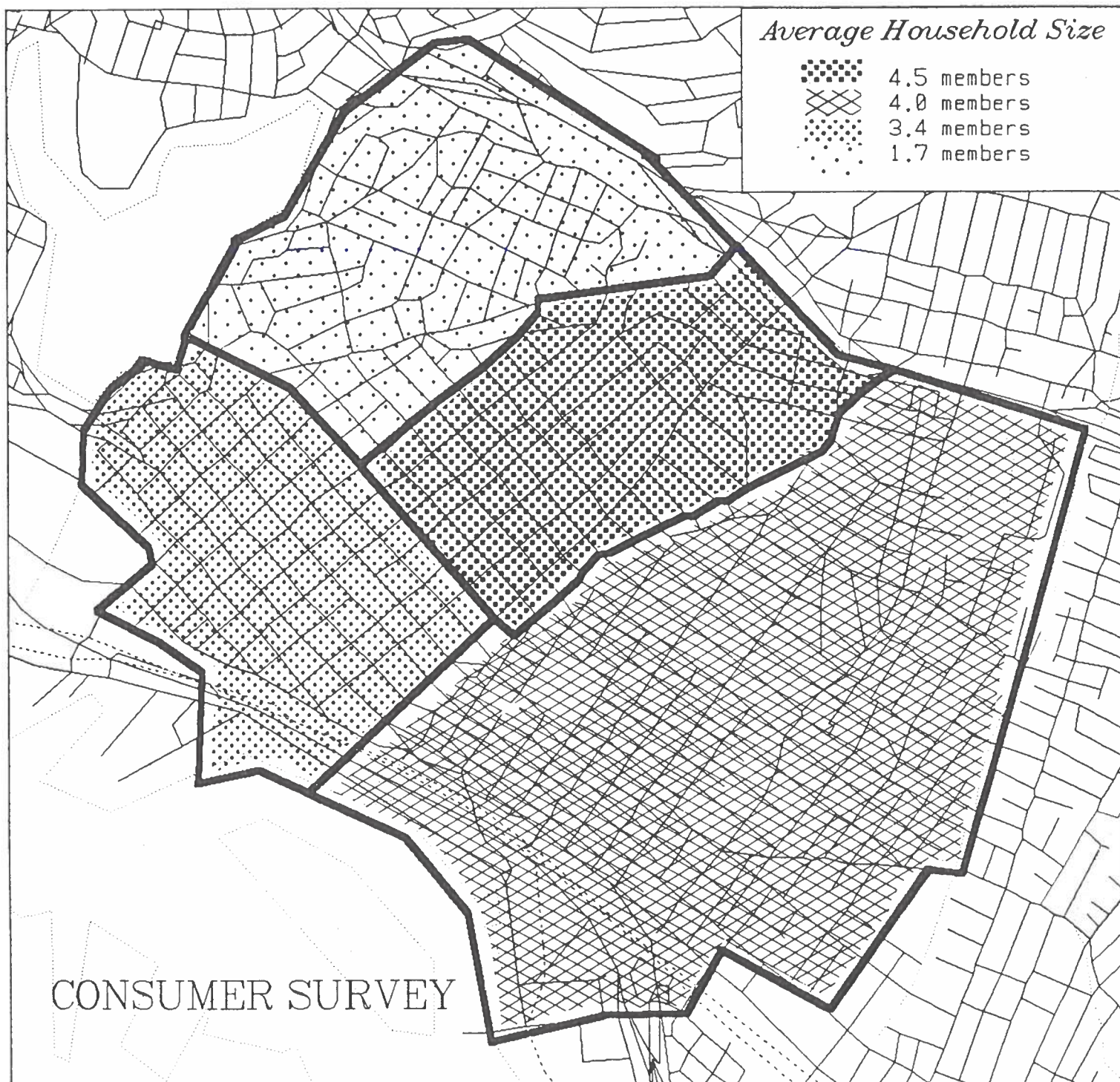
Plotting of Survey Responses

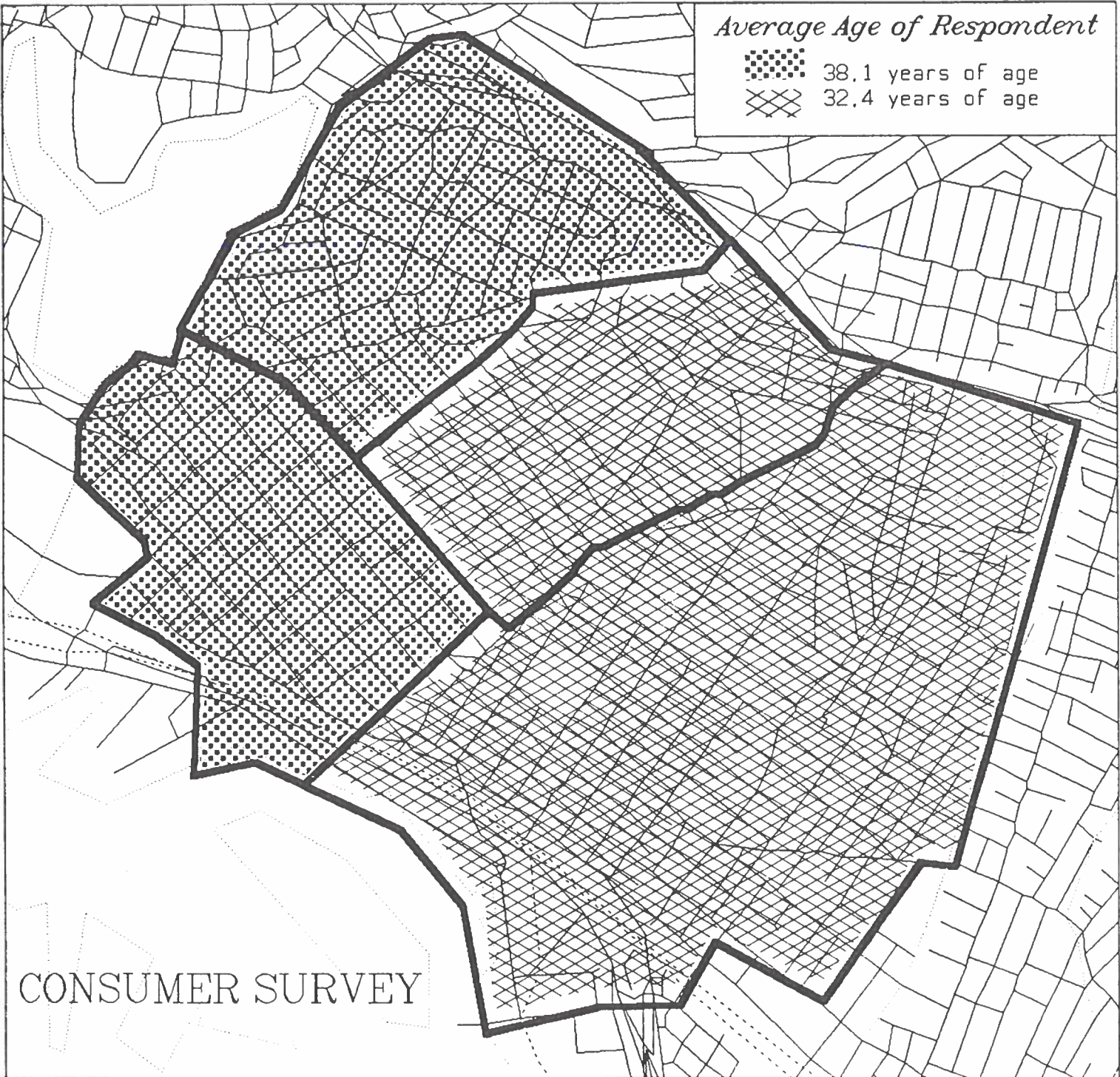


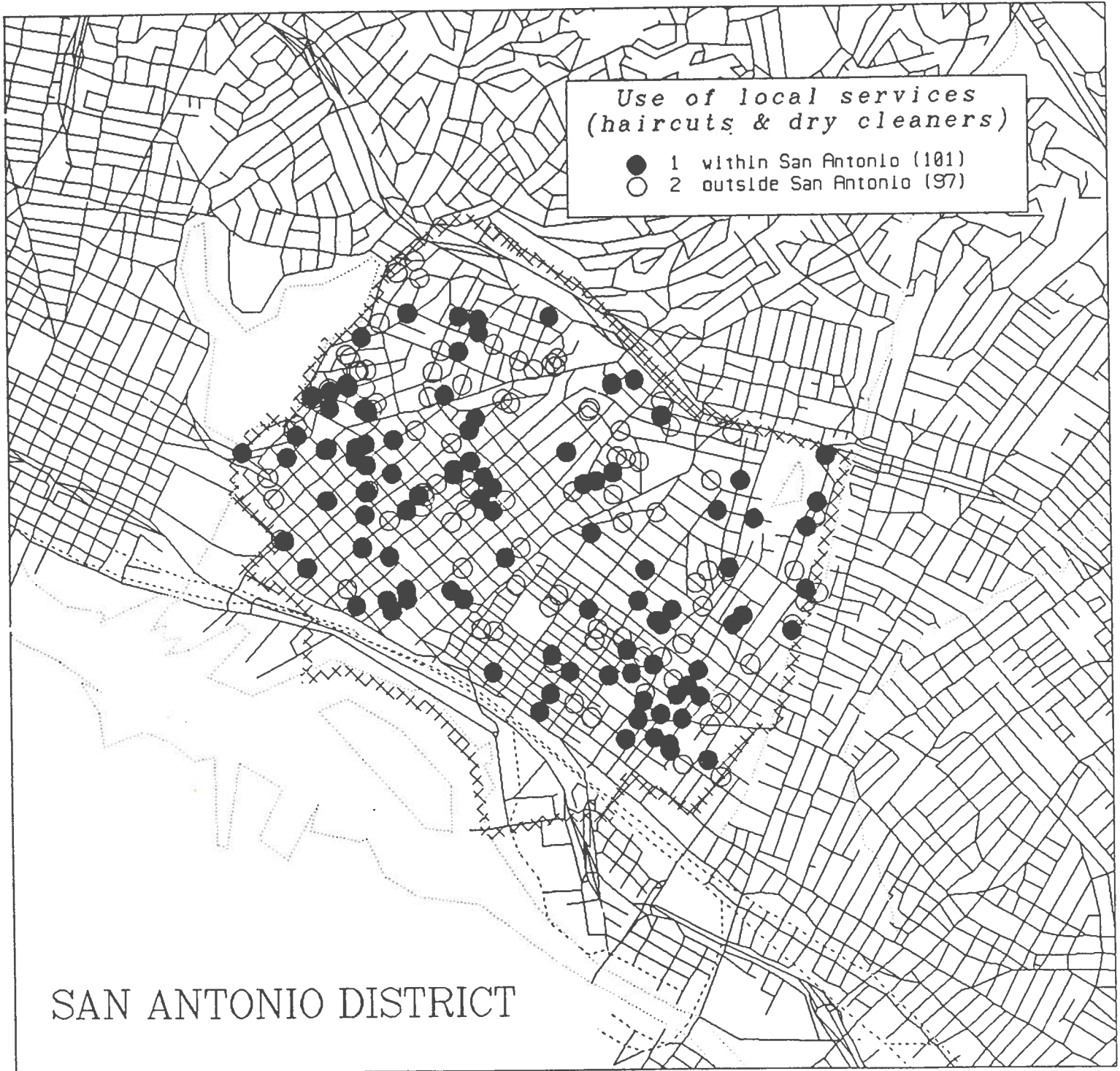


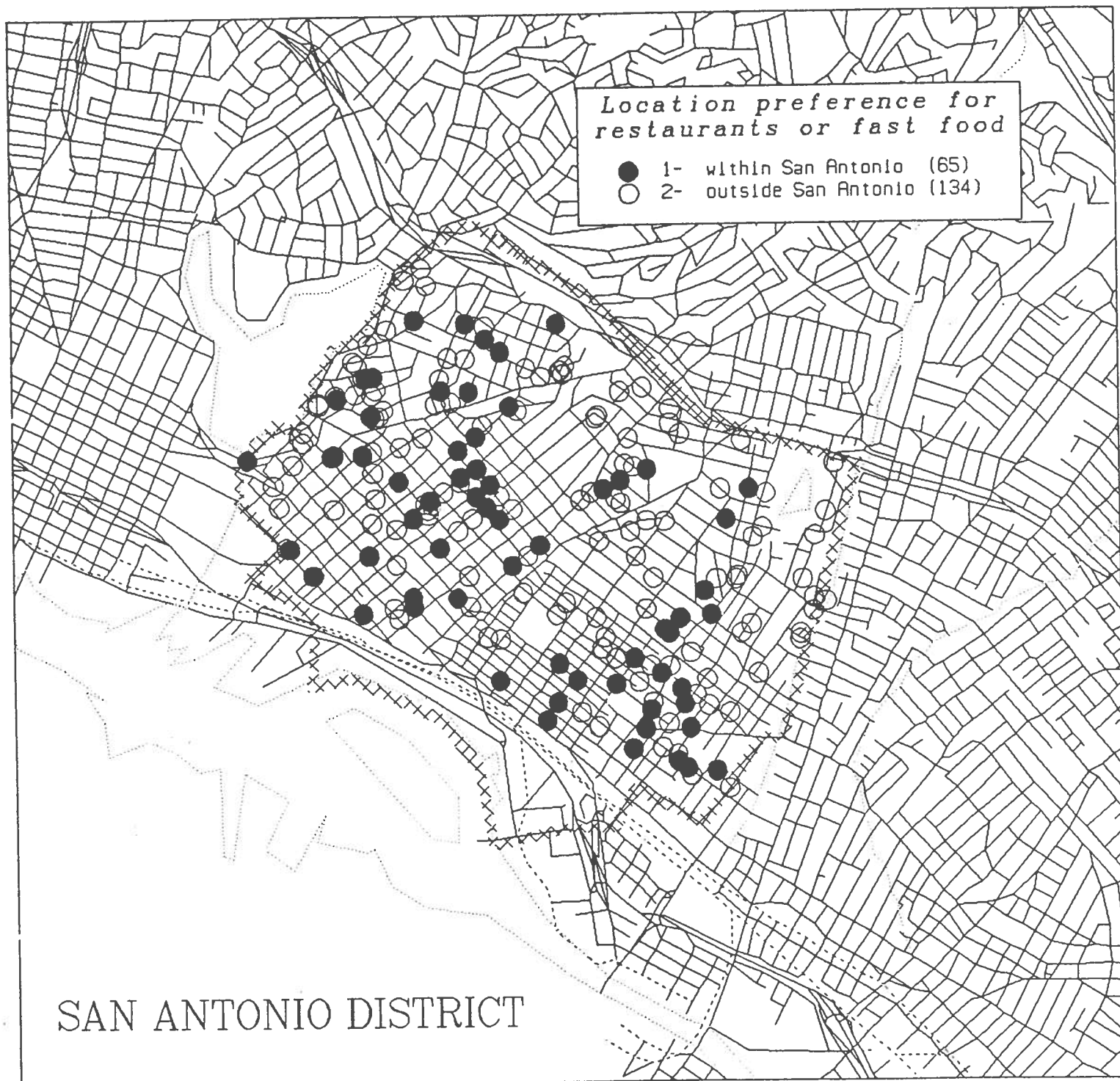


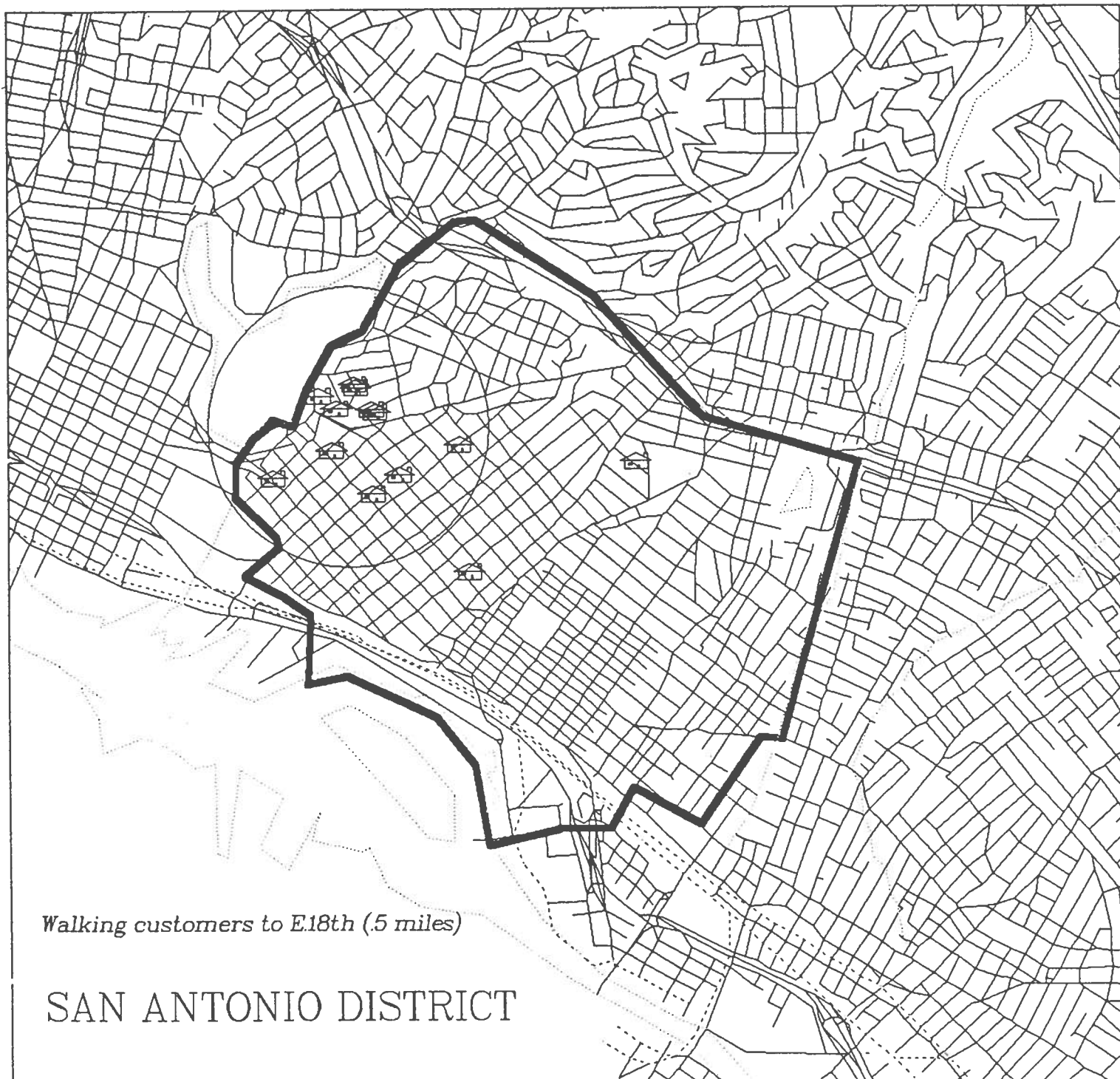
Map 7



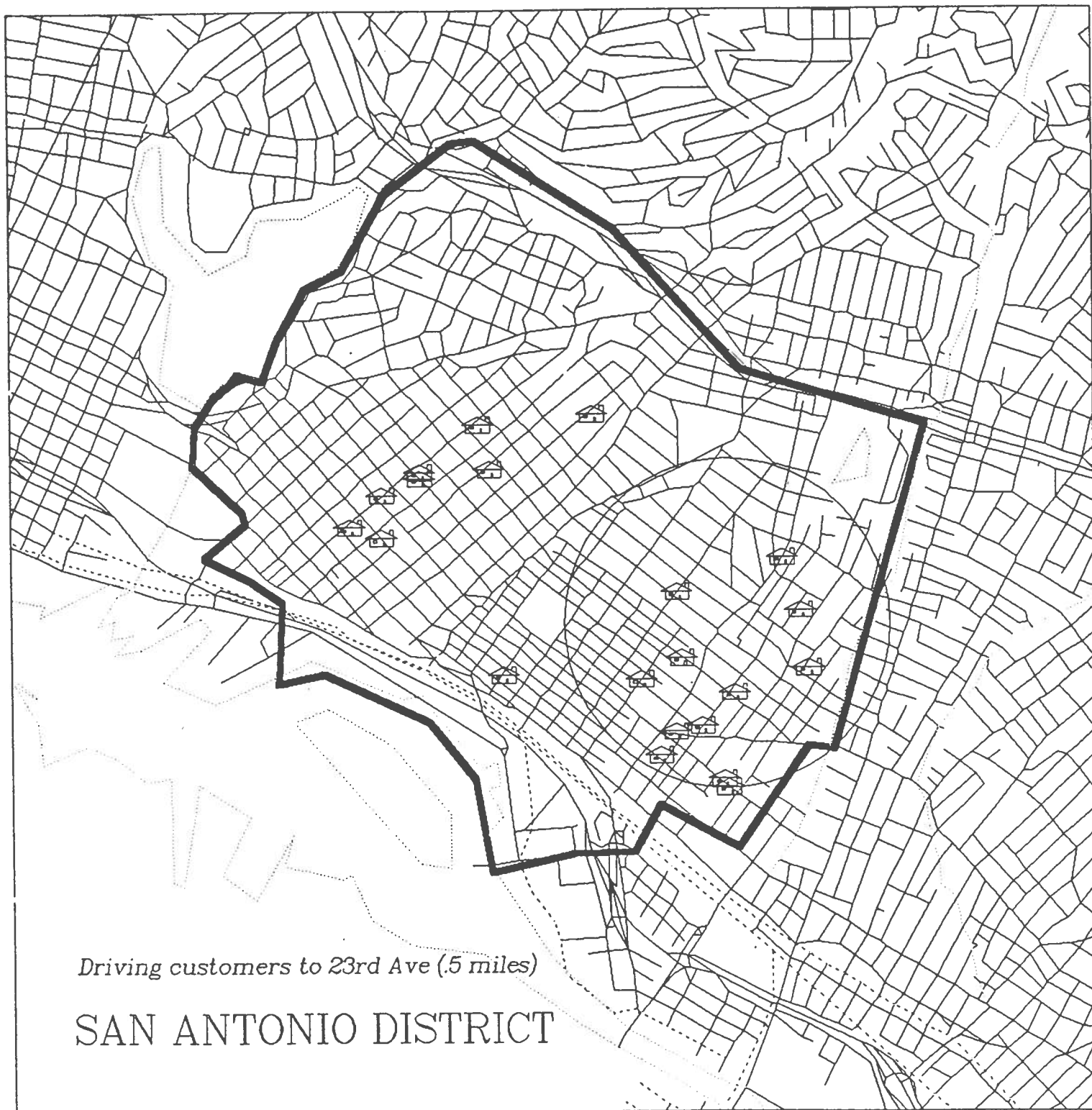


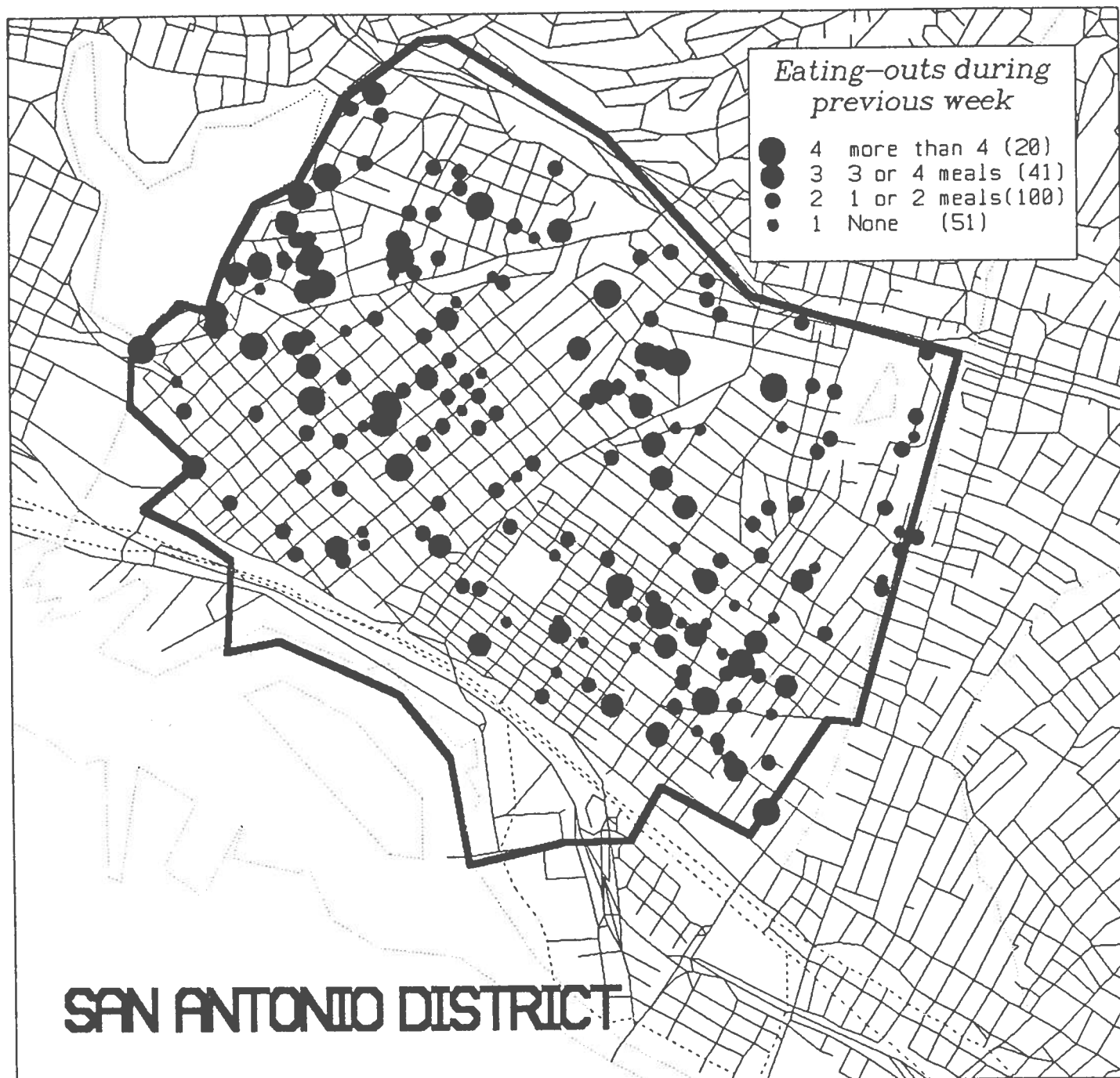


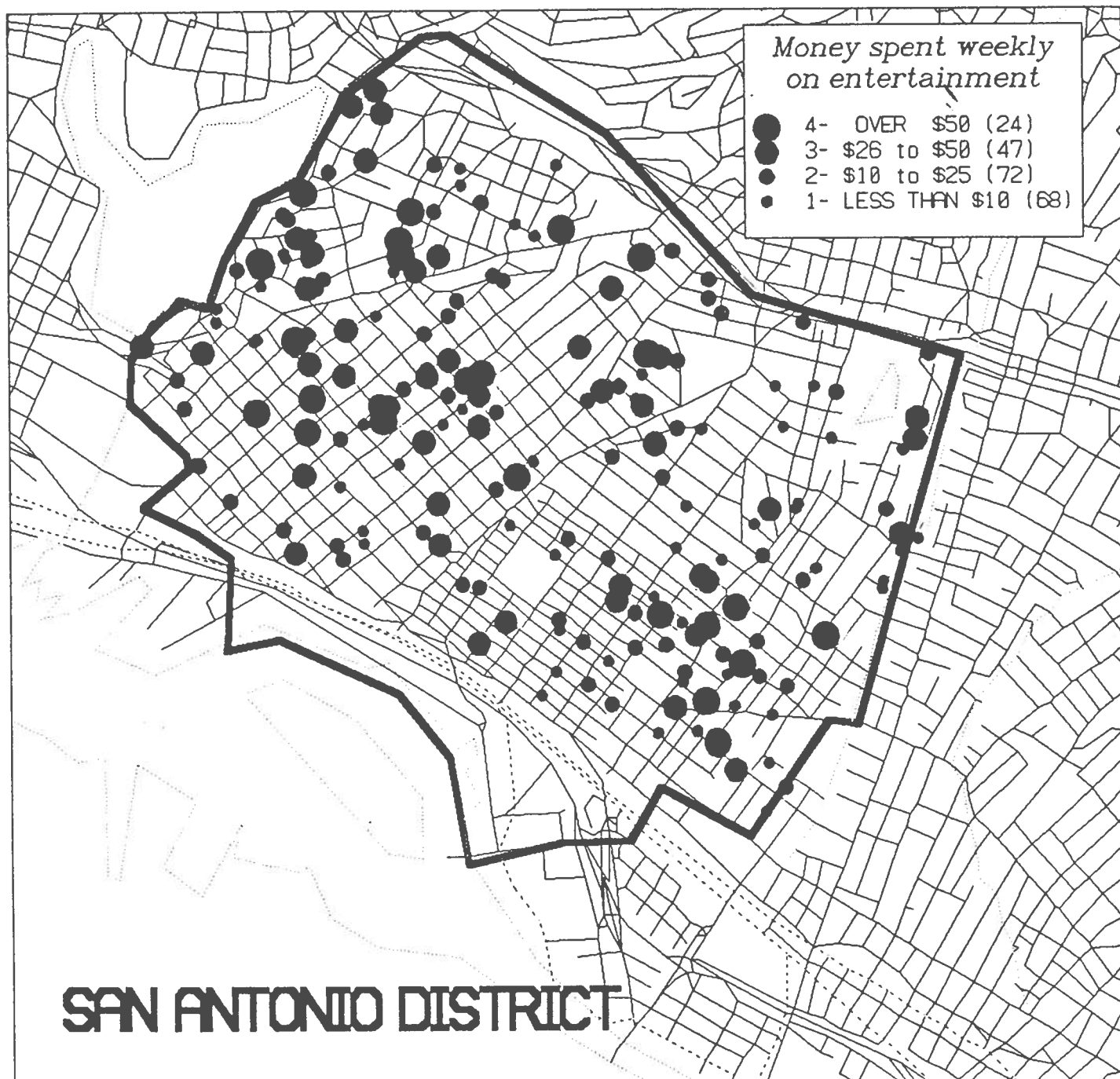




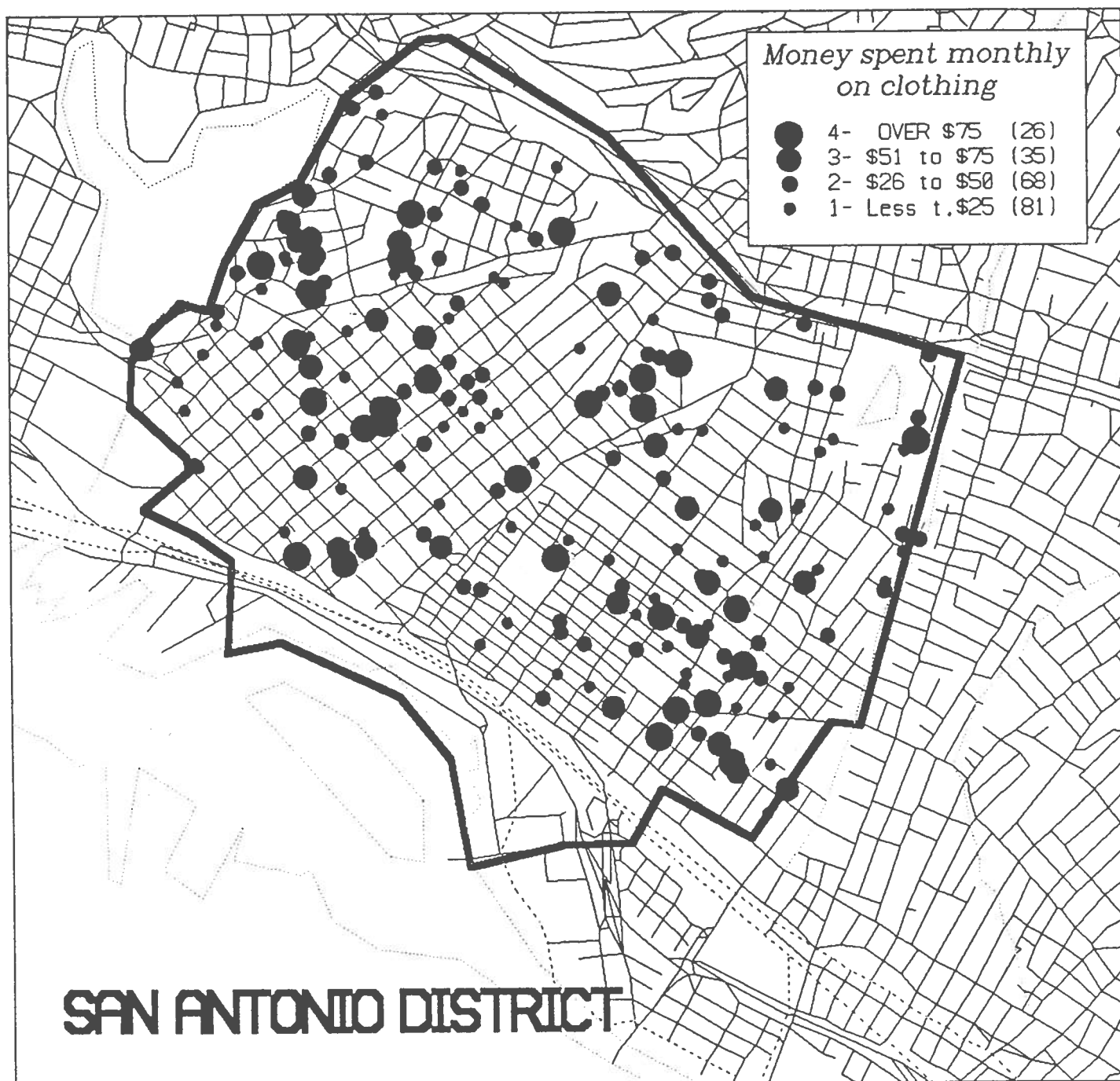








Map 16





Aggregate Demand Study

In assessing the market potential trade area three key questions were posed. They were: 1) Given the current and projected income levels of the San Antonio and Fruitvale Community Districts, what types of retail/service uses should be recommended for the East 14th Street commercial area?; 2) How may the income levels for the trade area be affected by the projected population changes?; and 3) What is the market for commercial growth in the San Antonio/ Fruitvale community area? By estimating the total existing and future expenditure (buying power) and the existing commercial uses of the trade area, an analysis of existing gaps and capturable square feet for different retail/service categories was made.

Methodology

The market analysis was broken up into several phases. The first phase was the identification of a trade area, the geographical area where buyers are now coming from or may come from in the future. For purposes of this analysis, the geographical area selected consisted of the four zip codes areas of 94606, 94601, 94610, and 94602.

The second phase was the identification of all the necessary data needed for the analysis. This included information about commercial land uses in the areas as well as information about the existing and future demand for these commercial sites. The information gathered included the type of uses, the square feet of these businesses, the sales by type of business for 1988/1989 and 1989/90. Information about the existing and future population in the four zip code areas was gathered through the use of D & B-Donnelley Demographics, a private database service. The demographic information was matched to the Bureau of Labor Statistics data for percentage of income spent on different retail categories.

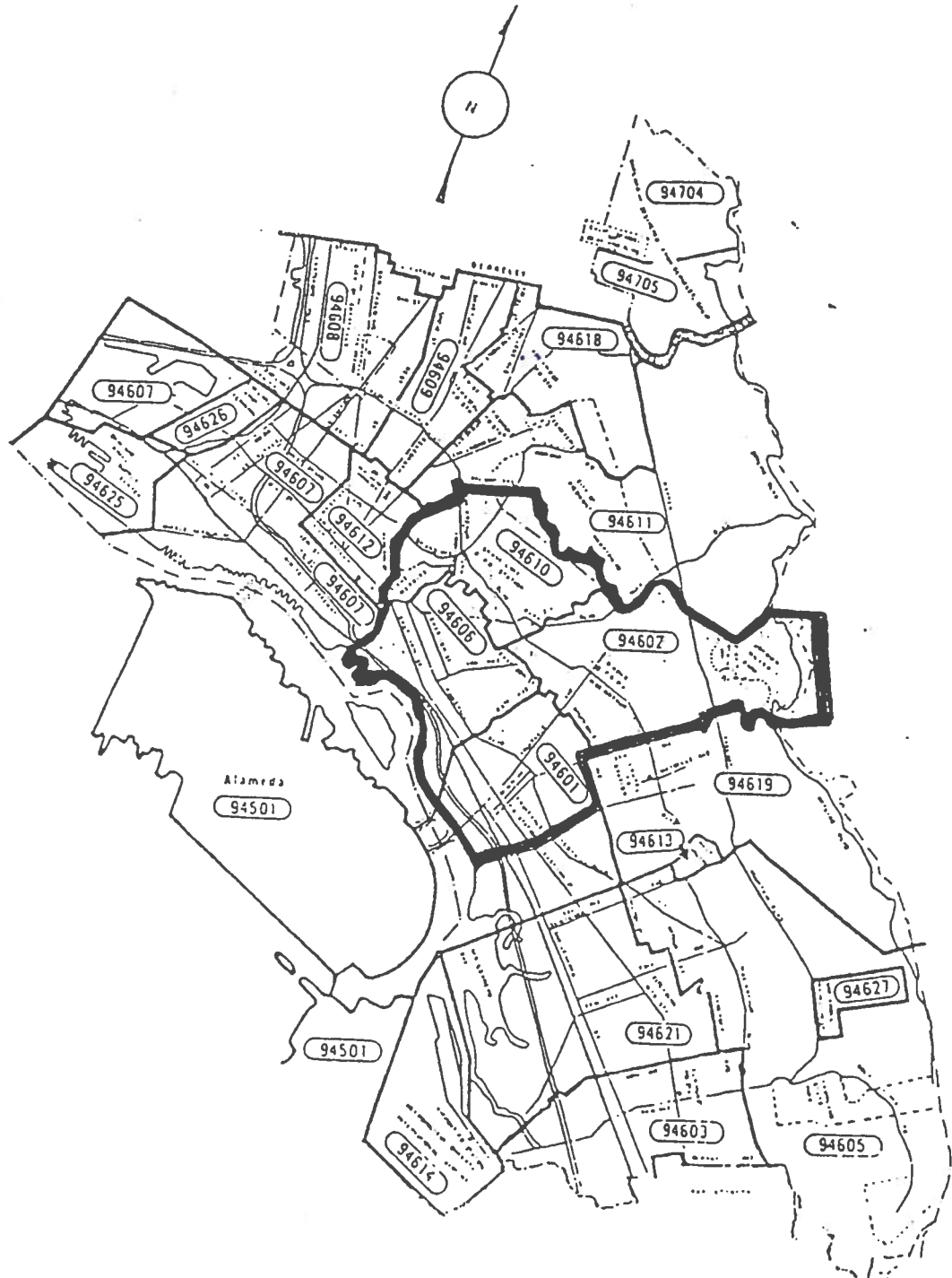
In addition to the inventory of commercial areas done by the Forum and the Coro Fellows, graduate students from a Community Development Studio (UC Berkeley) completed another inventory of the Fruitvale section of the trade area. The inventory of the commercial areas was matched with information provided by Oakland's Office of Economic Development and Employment and Finance Department. The inventory of uses were classified according to the State Board of Equalization business categories. By matching the commercial property data to the sales tax from the State Board Equalization, an assessment of the sales revenue for those categories was made. This information provides an estimate of the sales generated in the commercial areas by type and per square foot. The estimated sales for each category are subtracted from the potential "capturable" sales for the corresponding category (based on Bureau of Labor Statistics). The remainder, or "sales leakage," is the amount of sales for which a proposed center can compete. Finally, this residual is expressed as additional square feet by using average sales per square foot (ULI Dollars and Cents for Commercial Neighborhoods) as divisor.

An analysis of the trade area was made by reviewing existing and projected demographic information for the four zip code areas. The information gathered for the years 1980, 1989 and 1994 includes total population, total number of households, median and

average household income, population by race, male and female population, and total population over 15 years of age. The problem with this demographic data is the lack of current information. The projections made by Donnelley Demographics are based on the 1980 census, which does not break down ethnicity well and does not reflect recent changes in these areas. This is important because of the changing ethnicity of the population, especially the Asian population in the San Antonio community. An attempt to gather more accurate information will be made through the use of the Oakland Unified School District enrollment data for neighborhood schools.

Primary Trade Area = Zip Code Numbers 94606 & 94601

Secondary Trade Area = Zip Code Numbers 94610 & 94602



51

Acknowledgements

The Forum is a partnership between campus and community, and we would like to thank many of the people who collaborated in this project.

Community-Based Organizations

San Antonio Community Development Corporation --- Special thanks to **Don Davenport**, Executive Director, and to **Diane Carbone**, Economic Development Planner.

Coro Foundation, for the work of five Fellows in compiling data and writing the report "Dialogue and Development in San Antonio."

East Bay Asian Local Development Corporation --- Special thanks to **Lynette Jung Lee**, Executive Director, and **Mi Yeong Lee**, Project Planner.

Berkeley Asian Youth Center --- Special thanks to **David Kakashiba**, Executive Director, and **Enrique Sy**, Program Manager.

Oakland Forum Staff

Al Hernandez Santana, for his initiative and nonstop involvement in most aspects of the research, and his painstaking efforts learning statistical packages and computer mapping. Al analyzed the survey results using SPSS/PC+TM and MapinfoTM, and was responsible for writing this combined report.

Theresa Navarro, for the survey training and design, and the many hours spent collecting and analyzing market data. Theresa also helped with the first draft of this report.

Katrina Koh, for her management of the survey process and her never-ending source of energy and inspiration.

Arleda Martinez, for the staff support and her enthusiastic cooperation in managing the various databases and editing or formatting documents.

Elissa Brown, for assistance in address-matching the survey responses with MapInfoTM.

Jon Smibert, for transmitting an intricate knowledge of computer software and his assistance in organizing and interpreting the statistical tables.

Special thanks to --- Sandra Hilderbrand, summer research intern from Stanford University; for her invaluable assistance in setting up the survey maps database and taking part in the survey administration.

Henry Izumizaki, former Executive Director, and **Professor Edward J. Blakely**, CEO, for initiation of the Forum's Neighborhood Revitalization Process.

Additional thanks to -- **Chan U Lee**, **Robin Love**, and **Michele Williams**, Oakland Forum research assistants; and to **Chan Cao**, **Seng Saechao**, **Muong Saeturn**, **Chin Tran**, **Sandra Vuong**, **Anna Wong**, and several other BAYC counselors and students, for the long evenings spent conducting survey interviews and making telephone calls.

Other Contributors

Also thanks to **David Drury**, Lecturer in City and Regional Planning at UC Berkeley, for supervising the design of the original consumer survey, and to **Heather Hensley**, City of Oakland Office of Economic Development and Employment, for securing data on commercial property, retail sales, and automobile license regulations.

Forum Supporters

The Forum's Neighborhood Revitalization Process is supported by grants from the City of Oakland Community Promotions Fund, the William and Flora Hewlett Foundation, the San Francisco Foundation, the Bank of America Foundation, and the Community Development Work-Study Program of the U.S. Department of Housing and Urban Development.

Victor Rubin,
Executive Director
October 9, 1991