

Fisherman's WHARF

COMMUNITY BENEFIT DISTRICT

RETAIL STRATEGY
April 2018



Client

Fisherman's Wharf Community Benefit District
City of San Francisco
Office of Economic and Workforce Development

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lowercase productions

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How can we continue to improve Fisherman's Wharf?

The Fisherman's Wharf Community Benefit District (FWCBD) is committed to answering this important question. Which is why, in 2015, the Board of Directors set a goal to complete a retail strategy for the district. This document outlines how Fisherman's Wharf will achieve this goal. I am very excited to share this report with property owners, merchants, neighbors, residents, and city officials.

The process of going through the study was a collaborative effort between Seifel Consulting, FWCBD staff, and the Retail Strategy Task Force members who spent a year working on this project. Throughout the process, the guiding principle was to identify the best retail strategy to benefit both the fishing and tourism industries, while also making the district more enjoyable and appealing for local residents and visitors alike. Working with the entire district in mind, and with better communication between property managers, brokers, and merchants, we have already seen some great results. Ultimately, it is only through a shared vision for the district and by working collaboratively that we will achieve the goals laid out in this retail strategy.

Spanning retail, entertainment, appearance, safety, and the public realm, this study creates a clear direction on how to embellish and improve the Wharf for the enjoyment of both residents and visitors. I want to thank the members of the Retail Strategy Task Force and its' chair, Sina von Reitzenstein, who lent their time, experience and ideas. Thank you to Dan Reider of lowercase productions for the project's design. Special thanks to the Office of Economic and Workforce Development who provided a grant to assist in making this study possible, to Laura Schaefer, the Retail Strategy's dedicated Project Manager, and Rachel Brown, the FWCBD's Marketing and Communications Director. I would also like to extend my thanks to Libby Seifel and Danny Yadegar for their retail expertise and hard work.

The completion of this study is just one step in the process; implementation is everything! In November of 2017, the FWCBD Board of Directors approved the recommended objectives and goals contained in this retail strategy. These goals were then divided up between the appropriate FWCBD advisory committees who will begin working on the specific strategies outlined in this report in 2018.

We are only limited to the ideas and contacts we have, so we always welcome new ones. If there is something in this study that sparks an idea or reference, please reach out to me at troy@visitfishermanswharf.com or 415-673-3530.

Thank you for your interest and support in continuing to make Fisherman's Wharf a world-class destination.

Troy Campbell
Executive Director

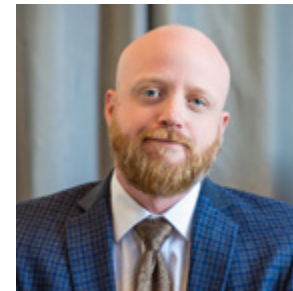


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INTRODUCTION

Fisherman's Wharf must work to preserve its unique character, working waterfront, and vibrancy. Like other world-famous districts, it must also evolve to stay competitive.



Who is the Fisherman's Wharf Community Benefit District?

The landside portion of the Fisherman's Wharf Community Benefit District (FWCBD) was founded by the business and property owners of this San Francisco neighborhood in November 2005. In December 2006, the FWCBD formed the portside business based community benefit district, which incorporates businesses with leases from the Port of San Francisco.

The district is funded through an annual property assessment on the land side and a gross sales assessment on the port side. The FWCBD is a 501(c)(3) non-profit organization, which allows it to apply for federal, state, and locally funded grants, as well as to seek out sponsorships from companies with a philanthropic division.

Given its broad representation and focused activities, the FWCBD has served as a catalyst for the unification of Fisherman's Wharf constituents and has successfully supported a number of positive changes in this historic San Francisco neighborhood.

The FWCBD has an administrative staff of three that includes Troy Campbell (Executive Director), Laura Schaefer (Program Manager), and Rachel Brown (Marketing & Communications Director). The organization is governed by a 25-member board of directors who set the strategic plans and goals. The FWCBD also contracts

with Block by Block for four full-time ambassadors who provide hospitality, safety, and cleaning services throughout the district.

The mission of the FWCBD is to preserve and enhance its vast San Francisco waterfront landscape and multi-cultural heritage, while integrating modern efficiencies to enrich the experience of visitors from both near and far through:

- Market Research
- Brand and Destination Marketing
- Sidewalk Operations, Beautification, and Order
- Traffic and Urban Planning
- Emergency Preparedness

The Wharf Snapshot

The Wharf remains a top destination for tourists who visit from across the globe to enjoy the sea lions, the seafood, and Bay views. Events like the 4th of July, Wharf Fest, and Fleet Week draw thousands of people to the waterfront year-round. Visitors typically stay for three hours or more, and 33% spend \$150 or more on local restaurants, attractions, and retail. 75% of visitors to the Wharf arrive by walking, public transit, ferries, bicycles, or other modes of transportation. The remaining 25% arrive by private automobile.

Fisherman's Wharf is unique in its dual function as a commercial fishing harbor and tourist oriented waterfront destination. For every one visitor, one and a half pounds of seafood is pulled from the sea and is still processed on the Wharf. Guests staying in one of the district's 3,200 hotel rooms have the opportunity to enjoy the Wharf's active and picturesque waterfront in many different ways. From visiting world-class attractions and historic ship tours, to shopping and dining on fresh-caught seafood in local-family owned restaurants, to chartering a fishing boat and interacting with local fishermen or taking a Bay Cruise under the Golden Gate – Fisherman's Wharf offers something for everyone.



About

65%

of San Francisco visitors come to the Wharf

60%

of Wharf visitors stay longer than 3 hours



Highly educated:

64%

have at least a bachelor's degree

75%

of visitors walk, take transit, share rides, or bike to the Wharf



16.4M

visitors in 2017



\$93k

mean household income



Over 3,200 hotel rooms and

400

retail establishments

About

\$600M

in retail sales and \$250M in hotel expenditures

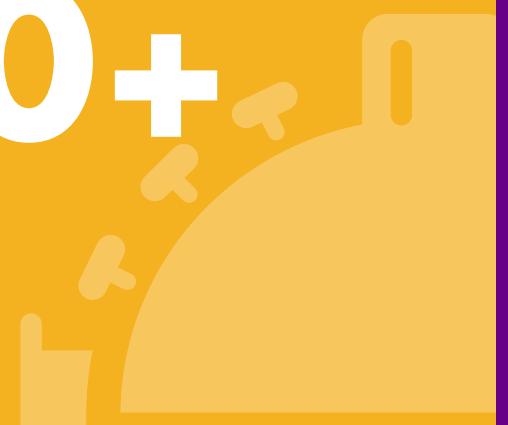
19M

pounds of seafood unloaded annually by commercial fishing boats



\$150+

33% of visitors spend between \$150 - \$300 per visit



Overview of Study Goals & Process

The Retail Strategy document will serve as a long-term road-map that helps to align property owners, developers, brokers and retailers with the district's vision for Fisherman's Wharf to be a lively and vibrant world-class destination.

The decision to create a comprehensive and actionable retail strategy for Fisherman's Wharf was driven by the need for the district to evolve and elevate its overall presence in the marketplace and also to become an increasingly top-of-mind and welcoming destination for the local customer base. As a result, the Fisherman's Wharf Retail Strategy was designed to assist in bringing quality new businesses to the Wharf as well as to focus on a district-wide visual enhancement program.

For the purposes of this document, retail is defined not only by the goods and services sold to consumers at Fisherman's Wharf, but also the physical and experiential environment encompassing those businesses.

Over a twelve-month period, Seifel Consulting gathered comprehensive data through significant community outreach across a broad range of categories and disciplines. Qualitative and quantitative data was distilled into strengths, weaknesses, opportunities, and threats to create the project goals and subsequent action items.

The implementation of this strategy encompasses a 5-10 year time frame but begins with actionable two-year priorities.

The document will serve to inform the district, real estate professionals, the Port of San Francisco, and San Francisco City Departments about opportunities at the Wharf for both public and private investment. The Retail Strategy also delivers recommendations for the retail curation, public realm, and further opportunities for event activation of the district. The document will be provided to local developers, leasing managers, merchants, property owners, real estate brokers, and retail recruiters as a reference document to help attract new businesses to the Wharf. It will also be used to generate interest and investment in the neighborhood. Fostering commitment and support from business owners and their representatives has been a key element of this project. Recognizing the economic impact of Fisherman's Wharf as one of the most visited destinations in San Francisco, the funding of this project was made possible by a matching grant by the Office of Economic and Workforce Development, a key partner of the FWCBDD.

Key Vision for the Area

For over 100 years, Fisherman's Wharf has been a working commercial fishing hub. Today, the area has evolved into an internationally recognized waterfront leisure destination that attracts over 16 million visitors annually. People want to preserve what makes it so special, while ensuring its legacy continues in the future.

Visitors and locals alike seek out exceptional areas that offer authentic and enticing retail, dining, lodging, and cutting-edge entertainment options. A unique local flavor is now an essential part of the consumer's overall experience.

Based on the input received, a collaborative vision was developed for the Wharf that can be synthesized as follows:

We envision San Francisco's Fisherman's Wharf to be a vibrant world-class destination that celebrates its unique history and historical importance in the fishing industry while offering an unparalleled retail, dining, and entertainment experience that showcases the natural beauty of the waterfront.

Walking along the waterfront, visitors will continue to enjoy breathtaking views of the Bay and beyond; they will be inspired by vibrant open spaces filled with live music and entertainment while savoring the tastes and smells of the

Wharf—from fresh Dungeness crab and fish in season to fragrant Sourdough bread. Nightlife and year-round events along with perfectly curated retail offerings including a burgeoning arts district and world-class attractions will ensure that a vibrant pulse is maintained throughout the district. The ideal balance of dining, shopping, fun and entertainment will make the Wharf a memorable place for all to enjoy.

In summary, Fisherman's Wharf will be a vibrant place where locals and visitors from around the world will be equally excited to eat, shop, and play from early morning to late into the night.

An aerial photograph of San Francisco, California, showing a dense urban landscape. In the foreground, there's a busy street with a red double-decker bus and several cars. To the right, a marina with several boats is visible. The middle ground is filled with various buildings, including a large one with a prominent '8' on its side. In the background, the city's skyline with numerous skyscrapers is visible under a clear blue sky. A large blue rectangular box is overlaid on the lower-left portion of the image, containing white text. The text describes the area as a mix of fishermen, locals, tourists, artists, and performers, and claims it to be the liveliest corner in San Francisco.

AREA PROFILE

Fishermen. Locals.
Tourists. Artists. Performers.
One neighborhood.
This may be the liveliest
corner in all of San
Francisco.

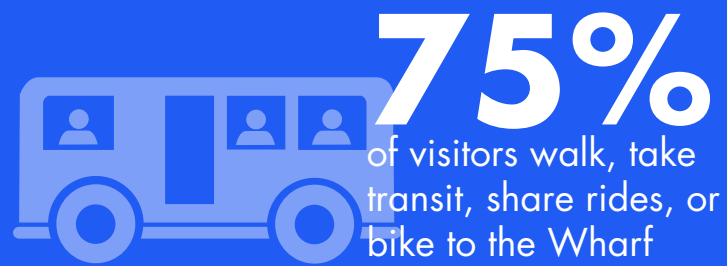
Uniquely Fisherman's Wharf

Fisherman's Wharf is an iconic destination that continues to attract generations of visitors and businesses to participate in its vibrant economy. While the Wharf is bordered by residential neighborhoods to the south, less than 5% of its 30-square block area is residential, making it a unique neighborhood in San Francisco. Its walkability and transit-accessibility encourages patronage from San Francisco and beyond.

The Wharf is a true working waterfront with 185 active commercial fishing vessels, 22 seafood distribution companies, and millions of pounds of seafood processed annually. Local fishermen are now permitted to sell fresh fish directly from their boats, generating a truly authentic portside experience that draws local patrons and crowds of onlookers.

World famous for its scenic bay views, historic crab stands, seafood restaurants, lively street life, waterfront attractions, and, of course, the barking sea lions, the Wharf is a vibrant commercial and entertainment destination in San Francisco. The district also has four shopping centers, over 3,200 hotel rooms, 400 distinctive retail businesses, and over 100 restaurants and eateries.

As the tagline proclaims, there truly is "something for everyone" at the Wharf.



Walk Score®



With a strong neighborhood infrastructure for both locals and tourists reflected in its nearly perfect Walk Score, Fisherman's Wharf is a walker's paradise.



A visual representation of the images and impressions that come to mind when people think of Fisherman's Wharf. FW Visitor Survey 2014

Neighborhood Nodes

Four neighborhood nodes have been identified in the Fisherman's Wharf District. The highest concentration of tourists visit the northern edges of the district while many shops and businesses in the southern areas also serve the residents of Telegraph Hill, North Beach, Aquatic Park, and Russian Hill. Each node contains at least one shopping center and/or major attraction. The following four key nodes of Fisherman's Wharf are also illustrated on pages 16-17.

JEFFERSON CORRIDOR

The Jefferson Corridor includes Jefferson Street, the "main drag" of Fisherman's Wharf. The Port of San Francisco controls leases on the north of Jefferson Street, and private owners control properties along its south side. The Port side contains the city's commercial fishing industry, tour boat companies, Red and White ferry landing, sport fishing boats, crab stands, legacy restaurants with stunning waterfront views, nautical-themed retail shops, and Boudin at the Wharf, San Francisco's famous sourdough bakery museum and restaurant. Anchorage Square is the corridor's largest shopping center, located on the south side of Jefferson Street. Fast food favorite In-N-Out Burger, Chipotle Mexican Grill, the newly opened Crepe Café, and Krispy Kreme doughnuts are all located here. Many of the Wharf's most highly visited attractions are concentrated in this area, including, Musée Mécanique, Madame Tussauds, San Francisco Dungeon, and Ripley's Believe it or Not! The corridor is also home to art galleries, specialty shops, visitor centers, a wine tasting room, and several bars, including the iconic Gold Dust Lounge.



Ghirardelli Square and Aquatic Park

Sidewalk cafe seating along Jefferson Street



GATEWAY WEST

Gateway West is anchored by Ghirardelli Square, which was purchased by Jamestown Properties in 2014. Jamestown has been thoughtfully remaking the center into a food and spirits venue, which also features family-friendly offerings, such as Culinary Artistas, Peekadoodle Kids Club and Subpar, a mini-golf venue and arcade that will open in 2018. Recent expansions and additional 2018 openings include Wattle Creek Winery, The Cheese School of San Francisco, Palette restaurant, and the San Francisco Brewing Co. These new additions join long-standing offerings in the area such as Gary Danko, The Pub, and McKormick and Kuleto's restaurant.

Fine art is a significant part of the Gateway West node, and its arts sub-district is home to the Cartoon Art Museum, Franklin Bowles Gallery, Keane Eyes Gallery, Chloe Fine Arts, as well as the Academy of Art University. The Powell-Hyde cable car turn-around is one of the Wharf's key gateway entrances from the south. Aquatic Park offers incredible vistas of Alcatraz Island and the Golden Gate Bridge, and is a key entrance point to the pedestrian and bike paths that connect throughout San Francisco's Golden Gate National Recreation Area.



The Powell-Mason cable car turn-around

HOTEL & NEIGHBORHOOD SERVICE CORE

Straddling the busy and visitor-centric Jefferson Corridor and the residential neighborhood of North Beach, this node contains most of the Wharf's hotels and meeting spaces. Anchored by NorthPoint Shopping Center, this area also contains businesses that cater to nearby residents including: Orchard Supply Hardware, Cost Plus World Market, Ross, Trader Joe's, Safeway, 24 Hour Fitness, Walgreens, Wells Fargo, GNC, and Goodwill. The Powell-Mason cable car turn-around is a key southern gateway entrance into the Wharf.

GATEWAY EAST

Gateway East consists of PIER 39, the Wharf's largest attraction, and nearby Pier 41, which is the ferry landing for the Blue & Gold Fleet, Rocketboat, and the WETA Passenger ferries. PIER 39 offers a winning mix of dining, shopping, and entertainment with a consistently high tenant occupancy rate.

According to SF Travel's 2017 research study, PIER 39 is San Francisco's most visited attraction. PIER 39 is home to 50+ specialty shops and 16 restaurants including Hard Rock Cafe, Bubba Gump Shrimp Company, Fog Harbor Fish House, and the Crab House. PIER 39 also has a host of fun-filled attractions such as the California sea lions, the Aquarium of the Bay, the San Francisco Carousel, Magowan's Infinite Mirror Maze, the 7D Experience, and the Flyer SF which opens in 2018.



PIER 39

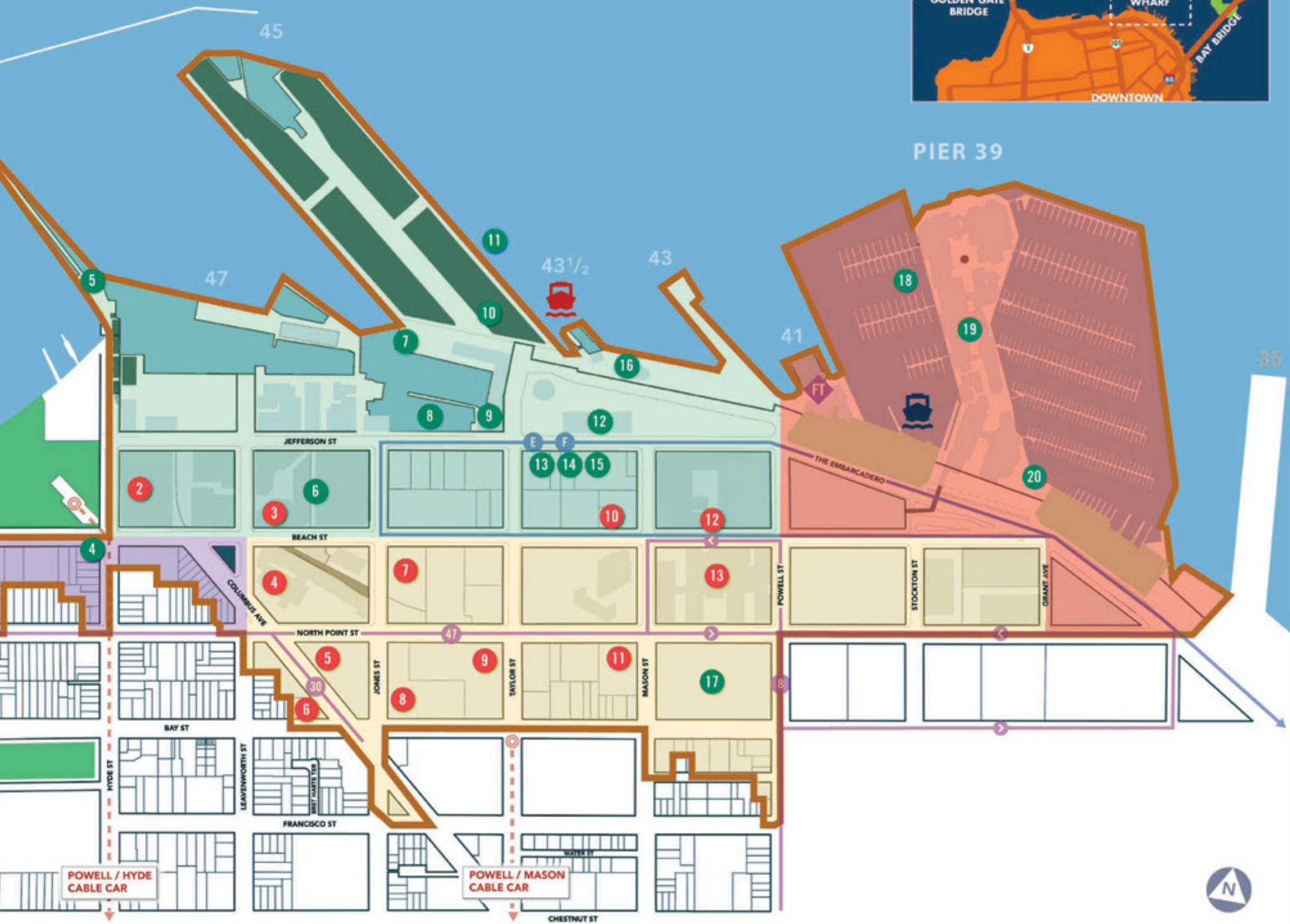
Neighborhood Nodes Map

GATEWAY EAST
 HOTEL & NEIGHBORHOOD SERVICE CORE

JEFFERSON CORRIDOR
 GATEWAY WEST

POINTS OF INTEREST & ATTRACTIONS	ACCOMMODATIONS
1 San Francisco Maritime Museum	1 Fairmont Heritage Place
2 Ghirardelli Square	2 Argonaut Hotel
3 Aquatic Park Historic District	3 Courtyard Marriott at Fisherman's Wharf
4 The Buena Vista	4 Holiday Inn Fisherman's Wharf
5 Hyde Street Pier	5 San Francisco Marriott Fisherman's Wharf
6 Anchorage Square	6 Travelodge by Fisheman's Wharf
7 Fishermen's & Seamen's Memorial Chapel	7 Holiday Inn Express & Suites San Francisco Fisherman's Wharf
8 Historic Fishing Fleet	8 Pier 2620 Hotel
9 Seafood Stands	9 Hyatt Centric Fisherman's Wharf
10 Musée Mécanique	10 The Wharf Inn
11 USS Pompanito & SS Jeremiah O'Brien	11 Hotel Zoe
12 Boudin Bakery	12 Hotel Zephyr
13 Ripley's Believe it or Not! Museum	13 Sheraton Fisherman's Wharf
14 Madame Tussauds	
15 The San Francisco Dungeon	
16 Pier 43 Promenade	
17 NorthPoint Shopping Center	
18 Sea Lions & Sea Lion Center	
19 PIER 39	
20 Aquarium of the Bay	





OUTREACH

What is best about the Wharf and how can it be improved? Visitors, residents, merchants, property owners, and brokers have very similar views.



What We Heard

The FWCBD has a long history of working closely with a variety of community representatives on initiatives to promote and improve the Wharf. For the Retail Strategy, the FWCBD organized a Task Force that is broadly representative of key stakeholders in the community. The members of the Task Force provided invaluable input into the retail strategy, and facilitated the outreach process to other community members to make sure the retail strategy represented a diverse set of perspectives.

Interviews and focus groups were held with key stakeholders during 2017 to hear their opinions and gather their recommendations including:

- **Local Residents** who live in or near the neighborhood and serve as its year-round customer base.
- **Businesses** that sell products and offer services in the Wharf, which include tenants of the public land owned by the Port and National Park Service.

- **Property Owners** who own buildings and land throughout the district, the Port of San Francisco, hotels, landlords of retail buildings and attractions, and management companies who represent Wharf properties.
- **Brokers** who are instrumental in bringing new tenancies to the district.
- **Visitors** who represent the largest customer base for the Wharf. Their observations were particularly important in developing the retail strategy recommendations. In 2014, the FWCBD commissioned a survey to develop an in-depth understanding of demographic and behavioral characteristics of Wharf visitors, as well as their opinions of the Wharf. The Fisherman's Wharf Visitor Survey findings were included to provide further insight to the visitor experience.

Across the board, input was consistent from visitors and local stakeholders about what makes the Wharf such a special place and what each stakeholder considers to be the most important changes to improve the Wharf.

Visitor Profile & Perspectives

These pages highlight the findings from the 2014 Fisherman's Wharf Visitor Survey. The remaining pages of this chapter provide additional insights, combining visitor and other stakeholder opinions regarding what they like best about the Wharf and how it might be improved.

WHO VISITS FISHERMAN'S WHARF?

The typical visitor to Fisherman's Wharf is about 40 years old, has a mean household income of \$93,000, spends about \$135 per visit, and is highly educated. More specifically, the survey indicates the following demographic profile for visitors:

- Average age of 40.3 years, with 40% of visitors under 35
- 75% of visitors are employed in some capacity, with 59% employed full time
- Mean household income of about \$93,000, with 40% reporting household income of \$80,000 or higher
- Highly educated, 64% hold at least a bachelor's degree including 12% who hold a graduate degree
- Over half of Fisherman's Wharf visitors are married or partnered, with 44% married and 8% in a domestic partnership
- Varied ethnic profile: Caucasian (52%), Hispanic-Latino (10%), Asian, Pacific Islanders (9%), Black, African-Americans (6%), and Other (23%)

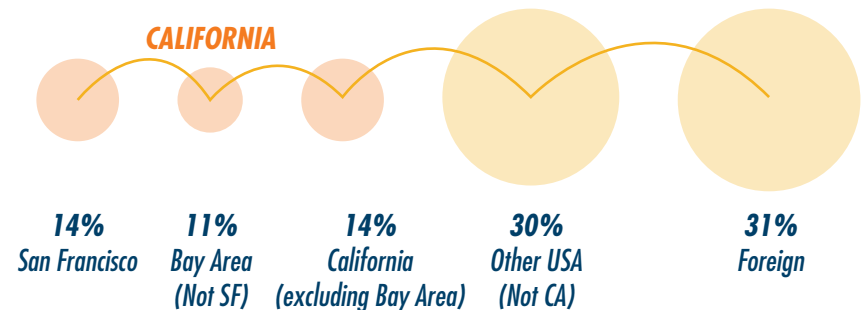
¹ Destination Analysts performed the 2014 survey, the results of which are presented in the Final Report: Fisherman's Wharf Visitor Survey 2014, which can be obtained from the FWCBD. The 2014 survey built upon the methodology and questions used in prior surveys performed in 2009/10 and 2006.

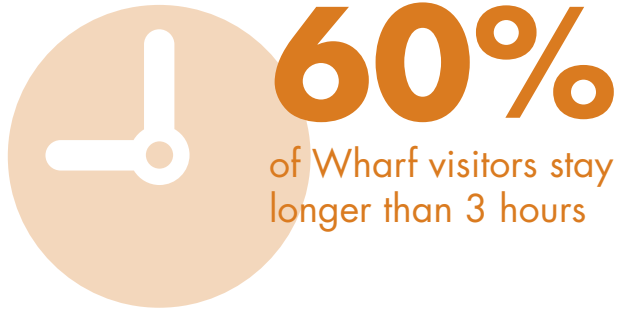
WHERE DO VISITORS CALL HOME?

The Wharf attracts visitors from all around the world:

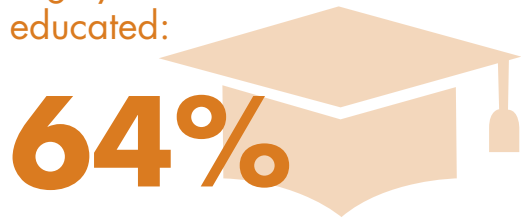
- The largest share of visitors live in California, (39%), which includes local San Francisco residents (14%), residents from other Bay Area counties (11%), and the rest of California (14%)
- About 30% of visitors live elsewhere in the United States, outside of California, with the New York/New Jersey region being the largest domestic market
- About 31% of visitors live in other countries, with the largest host countries being United Kingdom (5%), Canada (3%) and Germany (2.5%)

VISITOR PLACE OF RESIDENCE

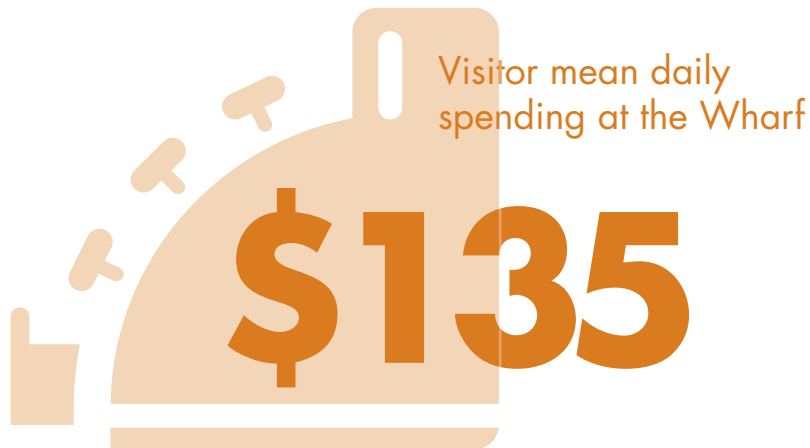




Highly educated:



hold at least a bachelor's degree



Sea lions are among the most memorable attractions at Fisherman's Wharf.

WHAT DO THEY VISIT THE MOST?

Visitors enjoy attractions, dining, and shopping at Fisherman's Wharf, but consider the following to be the top Wharf attractions:

- PIER 39 (66%)
- Sea lions (36%)
- Ghirardelli Square (30%)
- Bay Cruises (17%)
- Aquarium of the Bay (12%)
- Hyde Street Pier (12%)

PIER 39 is not only considered the top attraction in the survey, but it consistently ranks as San Francisco's top tourist destination, according to SF Travel.

Best Wharf Qualities

Visitors and local stakeholders shared what they like about the Wharf and agreed that:

1. They love the Wharf's unique waterfront character and location, emphasizing its proximity to the Bay, scenic views, local fishing industry and diverse marine life - especially the sea lions - who are the Wharf's second most visited attraction.
2. They emphasized the ambiance, walkability, and vibrancy, particularly along Jefferson Street. People watching is a favorite activity, and high visitor volumes contribute to the Wharf's dynamic energy, which some compare to New York's Times Square.
3. They enjoy the wonderful variety of activities, restaurants, and attractions, particularly highlighting the Wharf's seafood restaurants, crab and chowder stalls, sightseeing options, and street performances. Having fun, enjoying good food, participating in performance art, or visiting unique museums are what make the Wharf so special.
4. They appreciate the Wharf's working waterfront and strong ties to the fishing industry. This authentic piece of the waterfront is one of the Wharf's most treasured assets.

In addition to the above shared observations, Wharf residents offered an additional complementary perspective that the Wharf's Hotel & Neighborhood Service Core, with its two grocery stores, major hardware store, drug stores, and numerous other businesses, serves many of their daily needs.



Impressive views ranked as a top feature of the 2014 Fisherman's Wharf Visitor Survey.

A visual representation of what people LIKE MOST from the 2014 Fisherman's Wharf Visitor Survey.



Areas for Improvement



Crowds along the Wharf, such as this one gathered to see street acrobats, are exciting to many people but, are also cited as a primary dislike about the area.

A visual representation of what people DISLIKE MOST from the 2014 Fisherman's Wharf Visitor Survey.



Local stakeholders were also aligned with visitors on the most important improvements or issues that the district should address. These included:

1. While both groups equally observed that high visitor volume is a core strength, and the intensity of the crowds is what they most enjoy, they highlighted that this is also what makes it most difficult to overcome the Wharf's image as a "tourist trap".
2. They emphasized the district's lack of local offerings and local draw, particularly to city residents who live next door in North Beach, Telegraph Hill, and Russian Hill. However, many also recognize that this is an important opportunity that could be capitalized upon, particularly to help district merchants weather the Wharf's seasonality.
3. The Wharf's lack of established nightlife, poor lighting, and the presence of "too many dark places" contributes to a general feeling that there is a lack of safety at night.
4. The opinion that the Wharf has too many gritty, dirty, smelly public spaces, which reflects a general lack of pride in the neighborhood.
5. Lack of sufficient public restrooms and public seating areas.
6. Access challenges to the Wharf, including poor transit service at peak times, limited parking availability and high parking cost, all of which make it difficult for Wharf businesses to attract and retain employees. Additionally, these same issues were perceived to deter visitors from coming to the district.

Suggestions & Ideas

The following suggestions to improve the Wharf were compiled based on the patron survey, observations provided by the stakeholders in the past year, focus groups, and the Retail Strategy Task Force.



Adding additional decorative lighting, similar to what the FWCBD has done at Joseph Conrad Park (pictured), was one the suggestions from stakeholders.

DISTRICT RETAIL

- Add more unique businesses to serve local residents as well as visitors, such as a seafood market, fast casual “healthy” restaurants, specialty shops offering S.F. or CA made goods, and apparel stores
- Keep businesses open at night and develop more places to socialize, such as a micro brewery/pub restaurant, wine bar, café with indoor/outdoor seating and cooking school
- Expand “retail-tainment” opportunities that deliver unique customer experiences and entertainment alongside retail and dining, such as Lego Discovery Center or Splitsville, as well as adding new attractions to the neighborhood such as i-Fly or new generation virtual reality/immersive attractions

As described in the “Findings” section of the report, many of these recommended business types have been recently added or are under construction in the Wharf.

THE WHARF’S UNIQUENESS

- Increase visibility of commercial and private fishing activities
- Encourage retail sales of fish
- Enhance gateway entrances and improve signage

PUBLIC EXPERIENCE, APPEARANCE & CONNECTIVITY

- Expand events, performances, and public art
- Encourage waterfront activities that bring residents and visitors to the Wharf year-round
- Continue to address street life and homelessness in the district
- Provide additional resources to address district cleanliness
- Increase lighting, including both decorative lighting in targeted areas and artistic lighting installations
- Improve the public realm, including streets, sidewalks, plazas, and seating areas
- Increase public transportation, especially in off-peak hours
- Better manage Wharf parking resources and encourage off-peak pricing
- Enhance access and paths along the waterfront



A visual representation of suggestions for change/improvement from the 2014 Fisherman's Wharf Visitor Survey. A majority of respondents were happy with their experience and offered no suggestions.

WHERE DO YOU LIKE TO VISIT AND SPEND TIME?

The locations below were described during the focus groups as great places to visit and spend time.



A young crowd enjoys outdoor seating in San Diego's Gaslamp district. Photo: San Diego Magazine



People enjoy a sunny day on Vancouver's Granville Island. Photo: iStock



Smores and More at the Noe Valley Town Square in San Francisco. Photo: www.noevalleytownsquare.com/photo-gallery

INVESTMENT

Since 2010, more than \$300M in private and public investments have helped improve the Wharf's attractions, businesses and public realm.



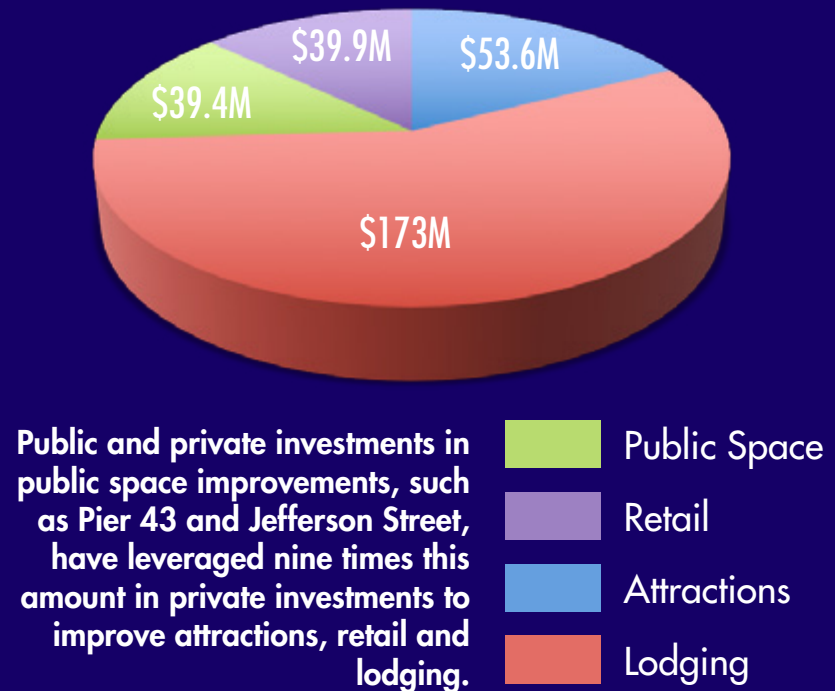
Public & Private Investment at the Wharf

Fisherman's Wharf is experiencing a renaissance that is reflective of modern trends while also reinforcing its rich historical character and vibrancy. Since 2010, more than \$300 million in private and public investments have been committed to expand the Wharf's mix of treasured businesses, visitor destinations, and hotel accommodations.

As shown in the accompanying graph and the map on the following pages, the private and public sector has made or is currently making major investments in the Wharf, many of which exceed \$10 million in individual investment. The public investment of more than \$12 million in the phase I of the Jefferson Street public realm improvement project has spurred significant private investment along Jefferson Street with recent openings and renovations of restaurants, retail shops, attractions, bars, and hotels. Several hotels are in the process of expanding or renovating, and each of the major shopping centers has invested in improvements to attract new tenants.

Phase II of the Jefferson Street public realm improvement project is shovel ready and only requires funding to begin construction. The plan calls for wider sidewalks, increased lighting, better vehicle circulation, and the enhancement of public plazas at key intersections.

PRIVATE AND PUBLIC INVESTMENT COMMITMENTS SINCE 2010



Jefferson Street, Phase I

Since 2006, the San Francisco Planning Department has been working with the Department of Public Works, the Port of San Francisco, the MTA, the Fisherman's Wharf CBD, residents, employees, property owners, and business owners to redesign Fisherman's Wharf for optimal use and enjoyment. Together they have designed a plan that not only addresses accessibility for the businesses, people, and fishermen who work in the neighborhood, but one that also makes modifications to create a better walking and biking environment for the millions of visitors that enjoy Fisherman's Wharf each year.

The first phase of the plan included two blocks of Jefferson Street and was completed in 2013. The most significant improvements included the addition of new sidewalks along the north side of Jefferson Street, where none existed, pedestrian scale lighting, changing the street from a one-way to a two-way street, and the removal of parking on both sides of the street. These improvements immediately generated significant positive benefits to local merchants and sparked significant private investment in the immediate vicinity.



Top: Jefferson Street prior to Phase I improvements. Bottom: After Phase I improvements.

SIGNIFICANT POSITIVE IMPACTS FROM JEFFERSON STREET, PHASE I

- **Increase in monthly sales** revenues, at key businesses along the Phase I corridor, of 10% to 20%
- **Increase in parking revenues** at the Port Triangle lot by more than \$200,000, which offset the loss of revenues from street parking
- **Strong patron approval of changes** to Jefferson Street, with 82% approving or strongly approving of the changes
- **Increased bicycle usage and walking** along Jefferson Street
- **Dramatic increase in private investment** in Fisherman's Wharf

“ *Blazing Saddles is very pleased with the new Jefferson Street improvement project. We have also noticed an increase in San Francisco and Bay Area residents visiting the area ...[and] a 7% increase in sales...over last year.* ”

*Jeff Sears, Owner
Blazing Saddles*



Cafe zones and pedestrians are now separated. Prior to Phase I pedestrians had to navigate cafe tables and servers or walk in the street.

BEFORE



AFTER



Major Investments

Since 2010, approximately \$300 million dollars has been spent, or is being invested, on improvements to local hotels, attractions, retail, and public spaces, which has transformed the district. Improvements are displayed on the map according to level of investment in descending dollar amounts.

\$20 MILLION OR MORE

- 1 Holiday Inn Fisherman's Wharf (Planned, Renovation Estimate)
- 2 Hotel Zephyr (formerly Radisson)
- 3 Wax Museum Building
- 4 Sheraton Fisherman's Wharf

\$10 MILLION TO \$19.9 MILLION

- 5 Hotel Zoe (formerly The Tuscan)
- 6 Pier 2620 Hotel
- 7 Ghirardelli Square
- 8 Holiday Inn Express & Suites San Francisco Fisherman's Wharf
- 9a Jefferson St. Phase I
- 9b Jefferson St. Phase II
- 10 San Francisco Marriott Fisherman's Wharf
- 11 Pier 43 Promenade - Port of SF

\$5 MILLION TO \$9.9 MILLION

- 12 Hyatt Centric Fisherman's Wharf
- 13 Aquarium of the Bay (Pier 39)
- 14 The Flyer (Pier 39)
- 15 Hard Rock Cafe (Pier 39)
- 16 Anchorage Square
- 17 Sabella Building (Applebee's)

\$1 MILLION TO \$4.9 MILLION

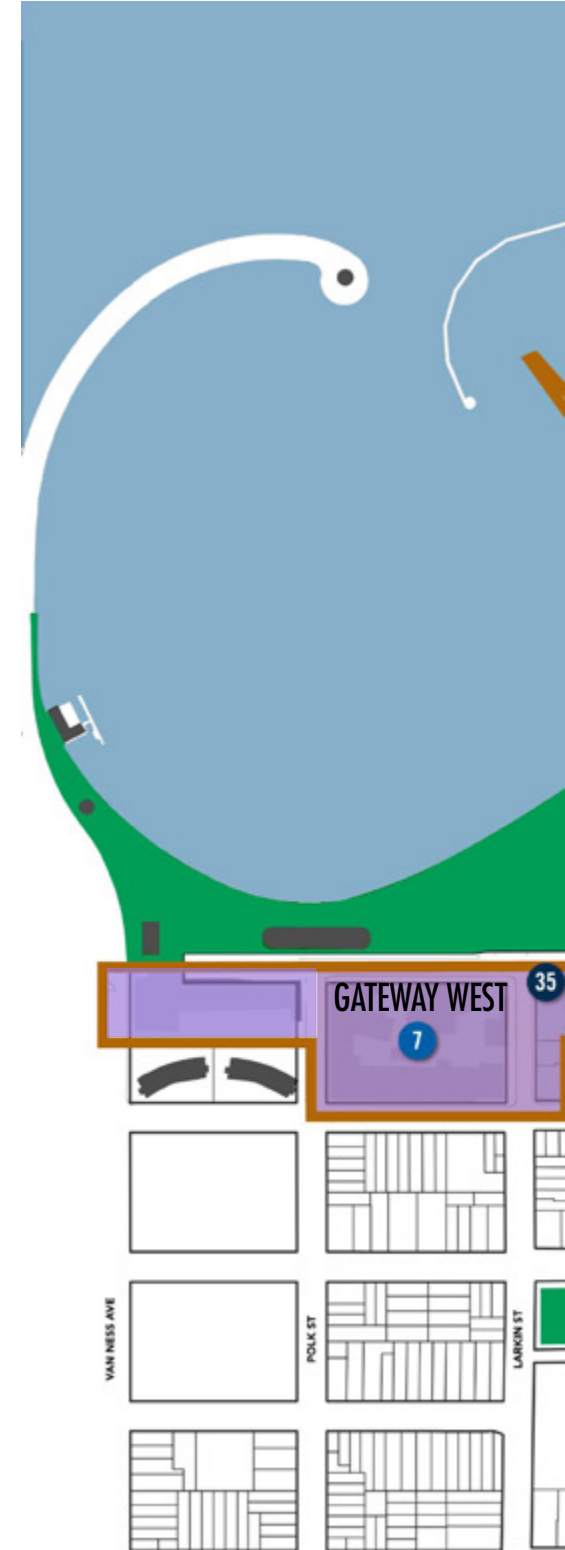
- 18 Orchard Supply Hardware
- 19 Argonaut Hotel
- 20 Hyde Street Harbor - Port of SF
- 21 Blazing Saddles Building
- 22 The San Francisco Dungeon (Drop Ride, Show Room, Effects)
- 23 Madame Tussauds/The San Francisco Dungeon (Façade Upgrade)
- 24 Pedestrian Access at Mason Street
- 25 Lou's Fish Shack

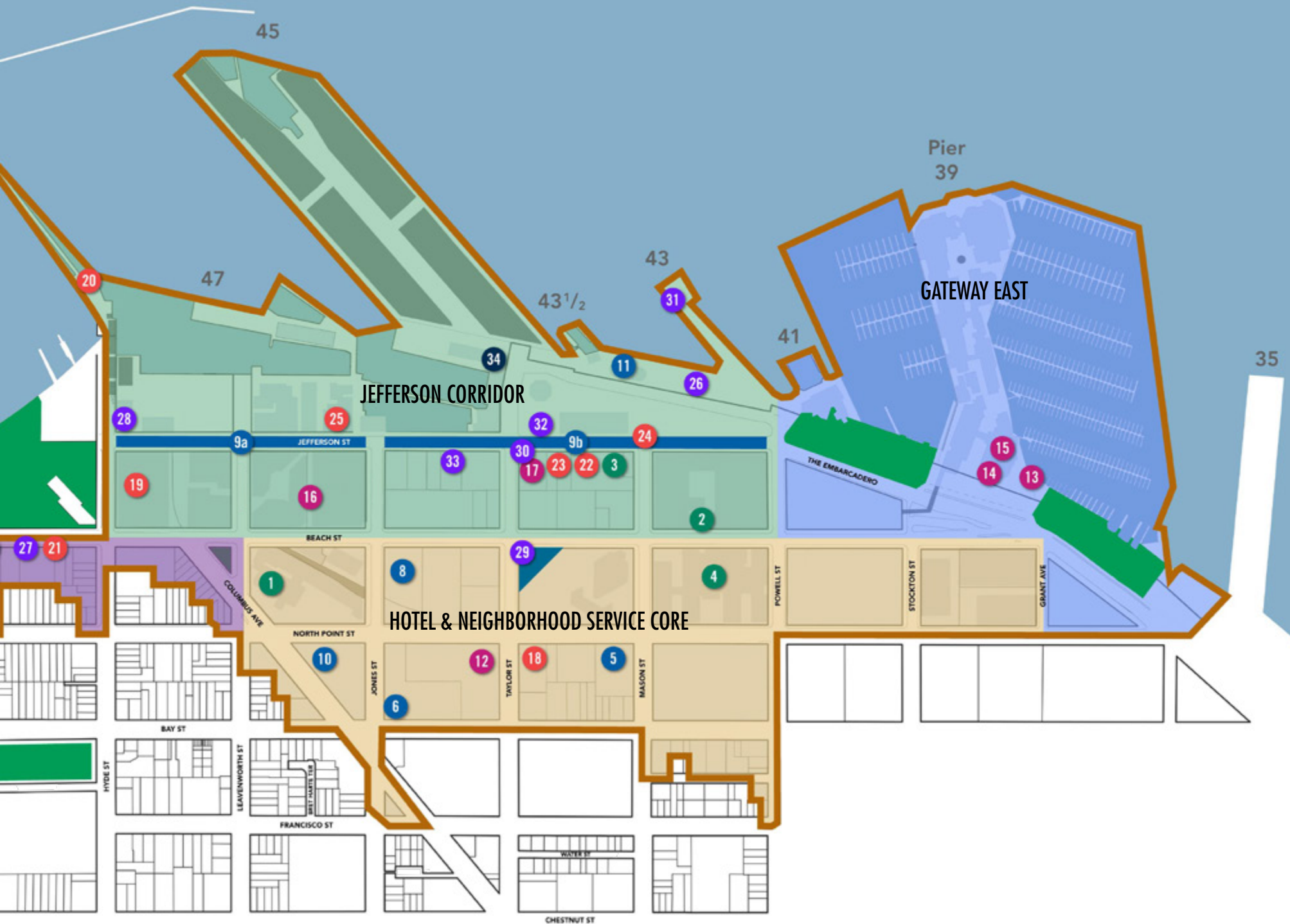
LESS THAN \$1 MILLION

- 26 J4 Pier Upgrade (Port of SF)
- 27 Cartoon Art Museum
- 28 Bay Company
- 29 B.A.L.M.A. Plaza Landscaping
- 30 Wharf Central
- 31 Arch Lighting at Pier 43 - Port of SF
- 32 Crab Wheel Sign Replacement
- 33 Dom DiMaggio Building

AMOUNT NOT AVAILABLE

- 34 Fishermen's Grotto No. 9 Building
- 35 CVS





Other Private Investments

Many properties at Fisherman's Wharf have been passed down through generations. The new generation of Fisherman's Wharf property owners are recognizing the need to improve and upgrade their facades and renovate their properties to remain competitive. This revitalization is becoming especially apparent on Jefferson and Taylor Streets.

The new owner of the Fisherman's Grotto restaurant recently completed a full remodel of the building and re-opened the bar and restaurant on the second floor overlooking the harbor. Lefty O'Doul's has relocated from Union Square to Fisherman's Wharf where they will transform the former Rainforest Cafe space next to the S.F. Dungeon. Overlooking the sport fishing boats along Jefferson Street, Cannizzaro Realty has exciting new plans to upgrade their property.

In the last ten years, hotels in the Wharf have consistently upgraded their properties. The Holiday Inn Fisherman's Wharf recently previewed their plans for an entirely new building, with new guest rooms and new retail frontage, to replace their underutilized surface parking lot. The former Radisson Hotel was recently rebranded the Hotel Zephyr by new ownership who remodeled all of its hotel rooms and public spaces. This significant investment to the hotel and the entire block of retail space which will be completed by summer 2018 has attracted Starbucks, Buckhorn Grill, and Carlo's Bakery to the district.



*Hotel Zephyr courtyard and game area.
Image: Hotel Zephyr*



Rendering of proposed facade improvements, Beach Street at Taylor Street.
Image: Cannizzaro Realty



Rendering of proposed facade improvements, Jefferson Street at Jones Street.
Image: Cannizzaro Realty



Photo: Rendering of Hotel Zephyr facade renovation.
Image: Hotel Zephyr

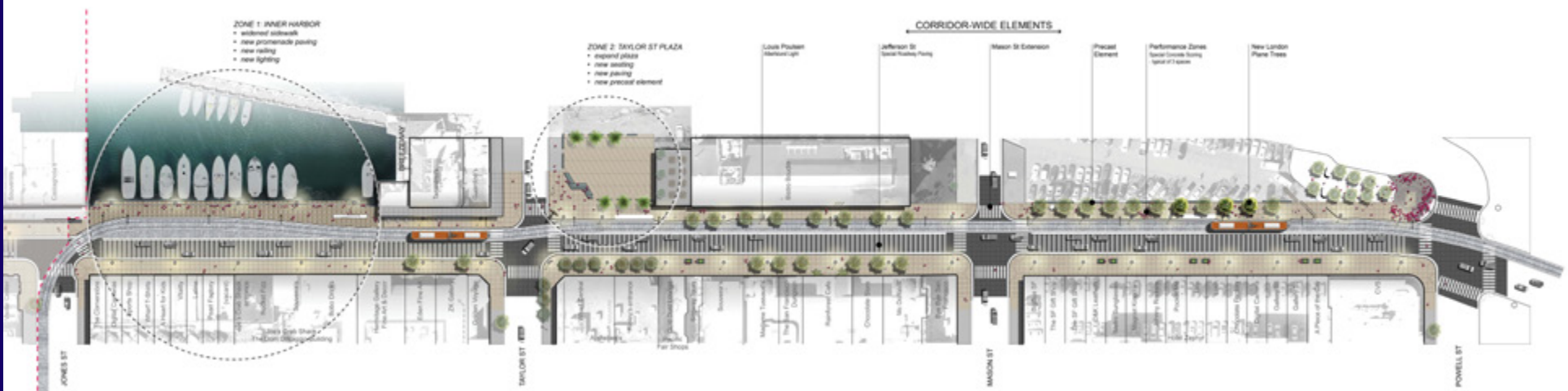
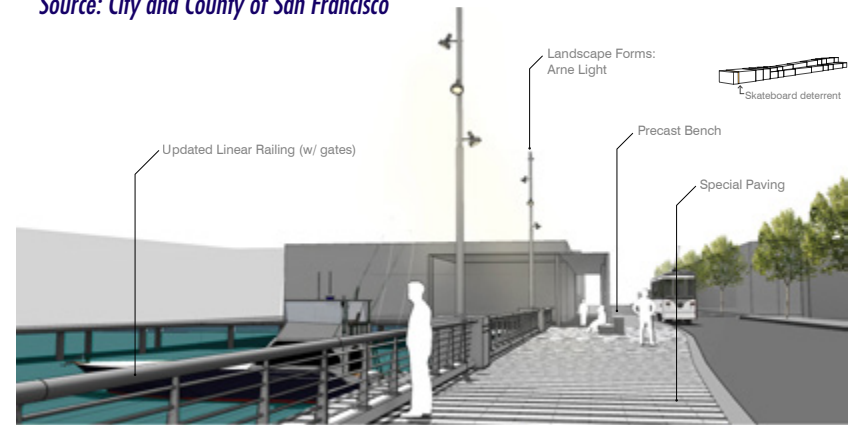


The Red and White Fleet proposed kiosk.
Image: Red and White Fleet

Jefferson Street, Phase II

The proposed second phase of the Jefferson Street redesign will improve the street and public realm areas of Jefferson Street from Jones Street east to Powell Street. The design will expand sidewalks in some areas, add trees, improve lighting, and make other pedestrian, bicycle, and transportation safety improvements to enhance the visitor experience and provide better business access. Equally important, Jefferson Street Phase II would also repurpose and transform a small portion of the existing parking area at Taylor Street, next to the iconic Fisherman's Wharf crab wheel sign, into a public plaza that could host small performances and events. This space could also be used as overflow parking during large events or activated with other special events. The conceptual design plans on this page provide a quick overview of the proposed improvements, which may be refined as planning proceeds.

*Right: Inner Harbor Concept
Bottom: Plan view
Source: City and County of San Francisco*



Port of San Francisco Improvements

Since 2010, the Port of San Francisco has completed a series of small and large-scale projects that have helped improve the overall pedestrian experience at the Wharf. Previously, on Taylor Street, the sidewalks in front of the historic crab stands were narrow and, on busy days, did not allow for free pedestrian traffic flow. In 2011 the parking on the west side of the street was removed and the sidewalk was expanded.



To further connect visitors to the waterfront, a condemned and dilapidated parking lot was removed and replaced with a new seawall promenade connecting Pier 43 to Pier 45.



Top: The Taylor Street Project removed parking and widened the sidewalk in front of the crab stands. This project was completed by the Port of San Francisco in 2011.

Bottom: Pier 43 Promenade, completed by the Port of San Francisco in 2012.

FINDINGS

Every time I come for a visit to San Francisco, I always make it a point to come by here. Why? There are so many interesting things to do and see. *Visitor from Burbank CA (Yelp Review)*



Retail Opportunities

Fisherman's Wharf offers unparalleled waterfront access along San Francisco Bay that supports an active working waterfront and a world-famous tourist destination.

With the exception of downtown San Francisco, the Wharf is the city's most dynamic commercial center, with approximately 400 retail establishments, 3,200 hotel rooms, and 20 exciting attractions, all within a compact thirty-block neighborhood.

Fisherman's Wharf is zoned C2 Commercial and has some of the least restrictive land use requirements in San Francisco.

Furthermore, the controls for formula retail that apply to most San Francisco retailers do not extend to the Wharf, making it a welcoming location for national and international chains.

“*Fisherman's Wharf is an American treasure. Gorgeous views of the Bay, Alcatraz and the Golden Gate Bridge. Sure it's touristy but it's active and there's always something to see.*”

*Visitor from Long Island NY
(Yelp Review)*

As described throughout this report, Fisherman's Wharf has a number of retail strengths and opportunities to capitalize upon, in addition to its locational advantages, such as:

- Strong Fisherman's Wharf brand and international name recognition
- Unique presence of a working waterfront alongside a tourist destination that attracts people from around the world as well as those who live nearby
- Distinctive entertainment, cultural, educational, and recreational activities
- One of the most popular national parks in the nation, the Golden Gate National Recreation Area.
- Diverse customer base of millions of visitors, workers, and residents
- Walkways, bicycle paths, and numerous public transportation options, which are the preferred ways of visitors traveling to the Wharf

Retail Challenges

While Fisherman’s Wharf has numerous retail strengths and opportunities, this is an especially challenging time for specialty retail districts such as Fisherman’s Wharf. Today’s retail must continually reinvent itself to stay relevant now that technology and evolving consumer preferences are changing the way many people shop.

Increasingly, customers are seeking authentic retail destinations that combine shopping with entertainment, recreational and educational experiences—sometimes referred to as “retail-tainment” or experiential retail. To engage shoppers, retailers must not only build strong relationships but must also provide compelling offerings that draw customers into their store, entice them to make a purchase, and encourage them to return in-person or online to shop.

This is particularly true for retail districts like the Wharf that feature a large amount of specialty retail. Consumers make “specialty consumer goods” purchases using discretionary funds, typically spent during their free time. As discretionary funds represent a small amount of a household’s retail spending, specialty stores must draw customers from a broad retail trade area to generate sufficient sales volumes, particularly in the off-season. To be most successful, specialty retail districts must offer unique shopping experiences coupled with an attractive environment. Both visitors

“*Foot traffic on the sidewalk is not enough to maintain a successful business.*”

Manager of Local Attraction

and local residents should feel happy with their overall shopping experience, which will encourage them to return again and again.

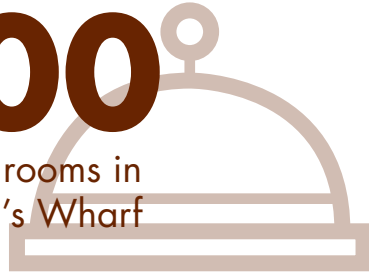
The good news is that the Wharf already has these elements of success and a high degree of customer satisfaction. The patron survey indicates 93% of patrons are very satisfied and 86% are likely to visit the Wharf again. **The Wharf must continue to maintain this high satisfaction level.**



*A juggler performs in front of the San Francisco Carousel at PIER 39.
Photo: PIER 39*

3,200

Hotel rooms in
Fisherman's Wharf



Lodging at the Wharf

The Wharf currently has thirteen lodging establishments with over 3,200 guest rooms whose occupants represent an important source of retail spending in the Wharf. According to the patron survey, visitors to Fisherman's Wharf are largely hotel guests who stay within San Francisco (62.5%), including those who stay at the Wharf.

Demand for lodging in San Francisco and in the Wharf is very strong. According to CBRE Hotels' Americas Hospitality Research (CBRE), the average daily room (ADR) rate has steadily increased from \$164 in 2011 to \$235 in 2016.

Like the City of San Francisco, the Wharf maintains a high average occupancy level compared to other hotels nationwide, with a reported occupancy rate of 87% in 2016, according to CBRE. While hotel occupancy in Fisherman's Wharf has increased since 2012, it declined slightly in 2016 (as compared to 2014 and 2015 when it reached a high of 89%). This decline in occupancy may be reflective of the major hotel renovations that have been underway in the Wharf.

“ *If you come to San Francisco, you have to eat at Fisherman's Wharf.* ”

*Visitor from Toronto, Canada
(Yelp Review)*

More than half of the Wharf's lodging establishments (8 out of 13) have recently been renovated or are in the process of being renovated and expanded. The Holiday Inn Fisherman's Wharf is proposing a four-story addition along North Point Street—where surface parking now exists—that would increase the number of hotel rooms from the current number of 342 to 516.

As the number of hotel rooms in the Wharf continues to increase and hotels are upgraded to justify higher room rates, the retail spending power of hotel guests staying at the Wharf is anticipated to increase proportionately. **Hotel guests staying at the Wharf and in San Francisco represent one of the most important sources of retail spending for Fisherman's Wharf.**

“ *We really enjoyed our time here. Some of the reasons why I'm a fan: beautiful water, fresh air, good eats, mom and pop shops, Ghirardelli Square, park, boat tour to Alcatraz, night street performers.* ”

*Hotel Guest from Chantilly VA
(Yelp Review)*

Customer Profile

\$93k
The average household income of visitors to Fisherman's Wharf

The primary retail customers of the Wharf are the millions of tourists who visit the Wharf each year, local San Francisco and Bay Area residents, and those who work in Fisherman's Wharf and San Francisco.

VISITORS

In 2017, approximately 16.4 million people from around the world (65% of all visitors to San Francisco) visited the Wharf. The typical visitor is about 40 years old, has an mean household income of \$93,000, spends about \$135 per visit, and is highly educated. On average, 45,000 people visit Fisherman's Wharf each day. The number of visitors can swell as high as 120,000 during the busy summer season or holiday weekends.

California residents comprise nearly 40% of all visitors. International visitors and those from the rest of the United States represented about 60% of all visitors. Bay Area residents represent about 25% of all visitors, and thus the Wharf is estimated to attract about 4.1 million Bay Area residents each year including a large share of San Francisco residents. **Bay Area residents offer one of the most important market opportunities for the Wharf as they live nearby and can be drawn to the Wharf throughout the year.**



Photo: Franciscan Crab Restaurant

93%

of people are "Satisfied" or "Very Satisfied" with their visit

4.5 /5
Facebook user rating for The Wharf

86%

of people are "Likely" or "Very Likely" to return

4 /5
Yelp, Trip Advisor, and TripExpert user rating for the Wharf

30,000

Immediate market draw of The Wharf



8,600

Workers employed at Fisherman's Wharf



RESIDENTS

The Wharf is home to about 6,000 residents and is located in close proximity to some of San Francisco's iconic neighborhoods like North Beach, Telegraph Hill, the northern edges of Chinatown, and Russian Hill. These neighboring districts create an immediate market draw of about 30,000 people, or 3% of the broader San Francisco market of about 900,000 people. Residents who live nearby exhibit diverse demographic characteristics from street to street. Typically, residents tend to be older and have smaller household sizes (two persons) as compared to the typical San Francisco household. Household incomes range from about \$60,000–\$125,000 in key subareas depending on the proportion of senior residents and renters, who tend to have lower incomes as compared to the citywide median income of about \$90,000.

Local residents already shop at grocers and other neighborhood retail stores, but would like to see a broader mix of businesses that appeal to both locals and tourists of all ages.

WORKERS

The Wharf has about 500 business establishments and 8,600 workers who work primarily in local lodging establishments (~2,500), retail/wholesale trade (~1,800), professional service companies (~1,300), and other service organizations that provide health care, education, real estate, administrative support, information, and other services. (~2,800).

The City of San Francisco currently has about 640,000 workers, with the largest concentration of jobs in downtown San Francisco, located about three miles to the south.

Local employees represent a major market opportunity, particularly for Wharf restaurants, coffee shops, and bars. Extended hours will help the Wharf expand its reach to local workers.

“ To be successful, the Wharf needs to emphasize its authenticity, local flavor, and design quality. ”

Local Neighborhood Resident

Port of San Francisco's Importance to the Wharf

19 million pounds of seafood unloaded annually by commercial fishing boats

The Port of San Francisco controls most of the waterfront property at the Wharf, along with the National Park Service. As previously described, the Wharf is a true working waterfront. Property owned by the Port of San Francisco is home to 185 active commercial fishing vessels and 22 seafood distribution companies. Wharf fishermen unload 19 million pounds of seafood annually, which represented about 11% of California's fishing revenues in 2016.

The Port also serves as the landlord for about 25% of the Wharf's retail establishments. The Port often enters into long-term leases with its tenants, and the current vacancy rate for Port property is estimated to be less than 5% (as compared to the Wharf's overall retail vacancy rate of 8%).

Port tenants generated about \$300 million in retail sales in 2016 (estimated based on interviews with Port tenants and an analysis of the Port's rent reports). The Wharf's highest revenue restaurants are located on Port property, averaging \$7.7 million in annual sales, with four restaurants exceeding \$10 million in sales in 2016. This translates to average 2016 restaurant sales performance on Port property of more than \$1,000 per square foot. Retail stores on Port property have similarly strong retail performance, generating an estimated \$2.5 million per establishment, or about \$900 per square foot in 2016.



*Top: Fisherman's Wharf Harbor
Bottom: Pier Market. Photo courtesy of Pier Market*



Retail Performance

The Wharf currently has about 400 retail establishments. Based on an analysis of 2016 sales tax data provided by the San Francisco Controller's Office, the Wharf generated an estimated \$580 million in total retail sales, of which about \$520 million is taxable. (Sales at food and drug stores are estimated assuming 30% ratio of taxable sales to total sales.) Port tenants generated about 50% of total retail sales at the Wharf.

While taxable retail sales for Wharf retail establishments have increased overall since 2012, they have declined over the past two years (from 2014 to 2016) after adjusting for inflation. A similar pattern has also occurred in the City of San Francisco. This decline may be attributed to the growing preference to shop online, as sales for consumer goods (typically sold at specialty stores) has declined most rapidly. Of particular concern, sales of consumer goods declined from \$134 million in 2012 to \$122 million in 2016, after adjusting for inflation.

Consistent with national trends, food-oriented retail establishments at the Wharf have performed better than those selling consumer goods. A typical Wharf restaurant (fine dining and casual) averaged about \$3.7 million while a specialty store averaged significantly below \$1 million in annual 2016 sales. In contrast to specialty stores, retail sales at restaurants (including those at hotels) increased by about 8% from 2012 to 2016.

However, the Wharf's recent growth rate for restaurants is less than 50% of citywide performance.

One of the biggest challenges for Wharf retailers is the seasonal nature of the Wharf retail environment, which is observable in the fluctuation of foot traffic. As indicated earlier, the number of Wharf visitors can swell to as high as 120,000 people per day, but decreases dramatically in the off-season months, particularly during inclement weather. Thus, it is critical for the FWCBD and Wharf businesses to continue to promote and support year-round events that attract both locals and visitors—such as the Christmas Tree Lighting, Wharf Fest, and events being programmed at the Cannery Courtyard.

RETAIL RENTAL RATES

The Wharf has a significant range of retail rental rates, according to landlords and shopping center managers. They report that annual rents for prime Wharf locations typically range from \$100 to \$200 per square foot, while rents at other locations range from \$30 to \$80 per square foot.

Retail Vacancies and Recent Additions

Based on a Fall 2017 survey of available retail space at the Wharf, the current estimated Wharf retail vacancy rate is about 8% (representing about 30 vacant spaces out of about 400 retail establishments). According to the survey, more than 50,000 square feet of retail space is available for lease, not including retail space that has been leased and is in the process of being built-out for occupancy. The retail vacancy map on page 47 displays these retail vacancies.

Retail vacancies provide new opportunities to more carefully curate the Wharf's retail environment. Recent business openings and expansions are diversifying the mix of retail and attractions at the Wharf, attracting a broader array of consumer demographics, as well as providing more venues that stay open into the evenings. **The adjacent list highlights what has recently occurred in each of the retail nodes. Locations under construction or scheduled to open in 2018 are noted in brown.**



*Diners enjoying modern Korean cuisine in Surisan's updated interior.
Photo: SurisanSF.com*

GATEWAY EAST

- Build a Bear Workshop
- Christmas Store at PIER 39
- DOUGH P Cookie Dough
- **The Flyer**
- Hard Rock Café Renovation at PIER 39
- **Mulberry & Grand**
- **Pacific Outfitters**
- **The Plunge**
- **Studio Manhattan**
- **Wahlburgers**

GATEWAY WEST

- Cartoon Art Museum
- **The Cheese School of San Francisco**
- CityRide
- CVS
- Culinary Artistas
- **Palette (dim sum restaurant)**
- **Pico (restaurant)**
- San Francisco Brewing Co.
- **Subpar (indoor mini-golf)**

JEFFERSON CORRIDOR

- Bobo Drinks
- **Buckhorn Grill**
- Crepe Cafe
- Find your Feet
- The Grotto
- JBL Electronics
- Krispy Kreme
- **Lefty O'Doul's**
- Lola of North Beach
- Lush
- **Supreme Crab Restaurant**

HOTEL & NEIGHBORHOOD

SERVICE CORE

- Burger Shack
- Crabsters
- Hotel Zoe
- Subway
- Surisan
- Wheel Fun Rentals

Implications of Key Findings for Retail Strategy

To continually leverage its opportunities and overcome the challenges associated with an ever-changing retail environment worldwide, Fisherman's Wharf must continue to:

- Provide more public places like the public plazas proposed for Jefferson Street Phase II. Here people can enjoy the waterfront and take picturesque photos, which may be shared on social media, reinforcing the Wharf's appeal.
 - Strengthen its connections to its working waterfront and maritime history, which will reinforce its strong brand and international name recognition.
 - Improve its shopping environment and mix of retailers to meet evolving consumer preferences, with emphasis on "retail-tainment" and "experiential" retail.
 - Encourage stores and local attractions to stay open at night, including at least one night a week during the off-season.
 - Focus on promoting the Wharf to local residents, workers, and hotel guests (who represent important sources of future demand) by emphasizing its local flavor and authenticity.
 - Provide marketing, merchandising, promotion, and business support to Wharf retailers, particularly those that sell consumer goods.
- Continue to reinforce the Wharf brand and attract new patrons through social media and direct outreach to hotel, business, and brokerage community.
 - Continue to host year-round events, particularly in the off-season, which will broaden the Wharf's customer base.



The cable car turnarounds serve as important access points to Fisherman's Wharf, often the very first place that visitors experience the neighborhood.

Retail Vacancy Map

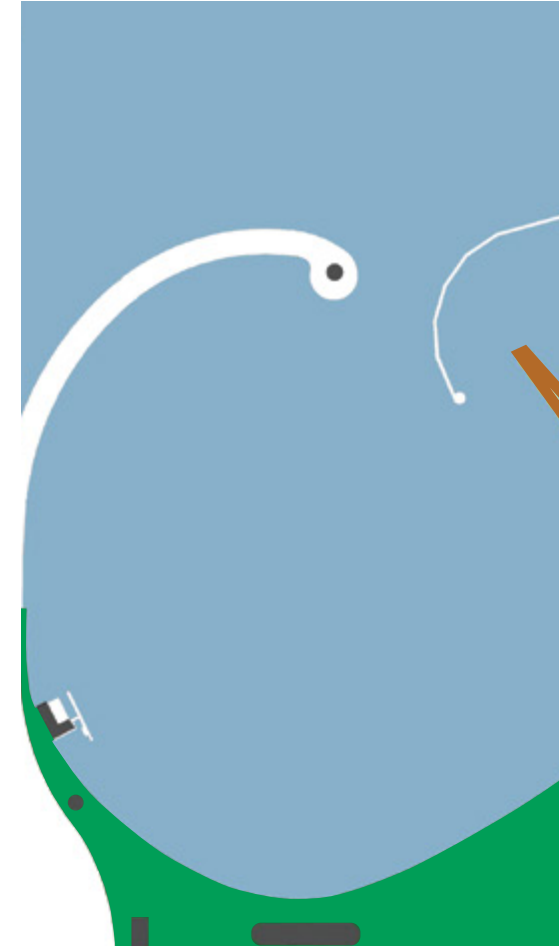
As of September 2017, about 400 retail establishments are located in Fisherman's Wharf and 30 vacant storefronts are distributed in the four retail nodes.



According to the Fall 2017 retail vacancy survey, more than 50,000 square feet of retail space is available for lease, providing new opportunities to diversify and upgrade the Wharf's retail mix.



The San Francisco Brewing Company's 7,000 sq. ft. tap room will open in Ghirardelli Square April 2018.
Photo: San Francisco Brewing Company





RECOMMENDATIONS

An aerial photograph of San Francisco, California, showing the Fisherman's Wharf area in the foreground and the downtown skyline in the background. The water is a deep blue-green, and the city buildings are densely packed. The sky is a clear, pale blue.

The Retail Strategy recommendations will create a unified path forward to achieve our collective vision for the future of Fisherman's Wharf.

Retail Strategy Recommendations

IMPLEMENTATION DEPENDS ON OUR COLLECTIVE ACTION.

The recommendations presented in this chapter were developed through ongoing meetings with the Retail Strategy Task Force, which represents a broad spectrum of property owners and merchants in Fisherman’s Wharf, as well as extensive outreach to businesses, property owners, residents, and commercial brokers during 2017. They were informed by surveys of visitors, focus groups, market information, and the adopted Fisherman’s Wharf Public Realm Plan.

The retail strategy consists of five core retail objectives that will collectively enhance the Wharf and strengthen its position as a world-class retail destination where locals and visitors from around the globe are equally excited to visit:

1. **Improve Wharf Appearance and Connectivity**
2. **Curate the District’s Retail**
3. **Connect to the Waterfront**
4. **Promote the Wharf’s Uniqueness**
5. **Enhance the Public Experience**

The retail strategy recommends a series of goals to be undertaken at the Wharf, organized by each of these five objectives and prioritized by their importance. The highest priority goals and associated near-term strategies to be accomplished over the next two years are presented in the following pages. **(The two-year priority strategies are highlighted in light green throughout this chapter.)**

Where these recommended objectives and goals could be accomplished in the Wharf are displayed on the opportunities map on pages 62-63.

Throughout the chapter, photos highlight how several of these near-term strategies are already in the process of being achieved at the Wharf and present real-world examples of how they have been achieved in other parts of San Francisco and around the globe.

1 | Improve Wharf Appearance & Connectivity

UPDATES ARE REQUIRED TO REMAIN RELEVANT

The process of continually improving the visitor experience is imperative for the Wharf to remain competitive within the marketplace. Similar to product marketing, it is critical to keep the Fisherman’s Wharf “brand” updated, fresh, and relevant.

Jefferson Street Phase I dramatically transformed what previously existed and this improvement must be leveraged into other streetscape improvements, most notably, Jefferson Street Phase II. Ideally, any streetscape improvements would simultaneously improve access to the district through better bicycle and pedestrian access and connectivity to the waterfront as well as stronger transit connections.

A number of building owners and hotels in the Wharf have recently made or are planning to make substantial investments and upgrades to their properties. These collective investments have already stimulated additional interest throughout the district and serve to acknowledge the Wharf’s market strength.

By reviewing the highest and best use potential of all space available in the district, particularly parking lots, garages, and empty lots, there is an opportunity to access an increasingly scarce resource in San Francisco—namely, open space. Such areas could be re-imagined or re-purposed as event and public gathering spaces, outdoor dining and seating opportunities, and potentially, re-development sites with open space on rooftops.

GOALS

RESPONSIBLE PARTIES

A Implement existing plans for urban design improvements per **Public Realm Plan** (includes Jefferson Phase II)

FWCBD
PORT

B Leverage public investment to stimulate more private investment by property owners and businesses

FWCBD
MERCHANTS
PORT
OWNERS

C Enhance **pedestrian/bicycle connectivity** to surrounding neighborhoods

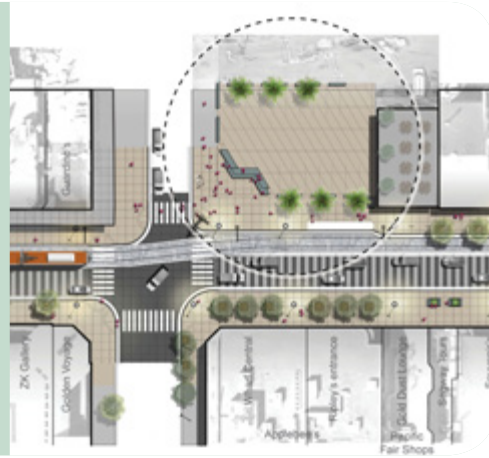
D Improve transit service to Wharf, particularly in high season and at night

E Make more efficient use of existing parking

*Goals and their associated two-year strategies are highlighted with green boxes

TWO-YEAR STRATEGIES

- 1.A.1** Assist in securing funding and planning approval to initiate construction of the Jefferson St. Phase II Public Realm Plan, which would further improve Jefferson Street and build a public plaza at Taylor and Jefferson



*A rendering of the Jefferson Street Improvement Project, Phase II.
Image: San Francisco Planning Department*

The Roxie Theater, established over 30 years ago, qualifies for the Office of Small Business' Legacy Business Program. Photo: Roxie Theater

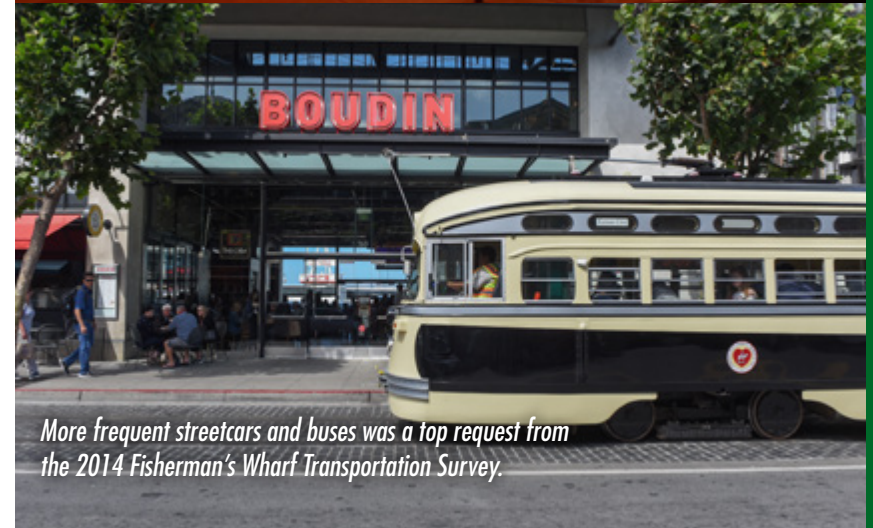
- 1.B.1** Implement upgrades to facades, awnings, signage, lighting, and window displays to stimulate new retail sales, particularly in the heart of the Wharf
- 1.B.2** Promote access to City programs offered by the Office of Small Business, Office of Economic and Workforce Development, and SF Environment (including Energy Watch Program) at the Wharf



The waterfront bicycle path connecting the Bay Bridge to the Golden Gate Bridge will be improved with Jefferson Street Phase II.



*St. Francis Fountain is one of many SF businesses that received a grant as part of OEWD's SF Shines Program.
Photo: Al Barna and Randall Ann Homan, Eater SF*



More frequent streetcars and buses was a top request from the 2014 Fisherman's Wharf Transportation Survey.

2 | Curate the District's Retail

THE RETAIL EXPERIENCE BEGINS ON THE STREET

While the Wharf remains well-positioned to capitalize on its unique offerings and attractions to cultivate retail growth and expansion, one of the Wharf's challenges is the lack of awareness of these same strengths, opportunities, and recent advancements.

A key part of the retail strategy is to provide current and targeted information to the brokerage community. Ongoing communications and information, such as new businesses that have recently opened at the Wharf, business expansions, and focused information about market opportunities will keep the Wharf top-of-mind.

Expanding nighttime activity and extending store hours into the night is a critical component of improving the customer experience and enhancing retail sales. This focus is timely since the district has attracted the historic Lefty O'Doul's bar to Jefferson Street, the San Francisco Brewing Co., Subpar, the mini-golf entertainment venue in Ghirardelli Square, and the Krispy Kreme doughnut shop in Anchorage Square, which has a 24-hour walk-up window.

*Goals and their associated two-year strategies are highlighted with green boxes

GOALS

RESPONSIBLE PARTIES

- A** Promote retail recruitment by providing **targeted information to the brokerage community** on a quarterly basis **FWCBD**
- B** Expand nighttime activity through new leases and commitments from existing businesses to stay **open at night** **FWCBD**
MERCHANTS
PORT OWNERS
- C** Create an overall **strategy on addressing cannabis in the district**, regarding locations, tourist education, and marketing **FWCBD**
OWNERS
- D** Strengthen growing **art sub-district** and promote art at the Wharf
- E** Actively recruit specific types of businesses to fit the needs of district retail nodes, with a focus on attracting new **locally-oriented businesses** to the Wharf
- F** Expand existing marketing efforts to **broaden customer base**

TWO-YEAR STRATEGIES

- 2.A.1 Showcase new businesses that have opened at the Wharf
- 2.A.2 Announce vacant retail space opportunities
- 2.A.3 Provide relevant information that helps to promote retail success



A vacancy on Beach Street is an opportunity retail brokers should know about. Photo: Danny Yadegar

The iconic Buena Vista bar is one of the many bars open past midnight nightly at Fisherman's Wharf.

- 2.B.1 Establish priority areas to focus nightlife, starting with major shopping centers and businesses along Jefferson Street
- 2.B.2 Develop a coordinated strategy to implement regular nighttime hours and events at least one night each month
- 2.B.3 Leverage excitement around new late night tenants by organizing evening events and increasing foot traffic to existing establishments open at night
- 2.B.4 Create a social media campaign to promote "Night-time at the Wharf"



*New/relocating tenants coming to the Wharf in 2018 include:
 Subpar (Miniature Golf) (top)
 The Cartoon Art Museum (middle)
 The Cheese School of San Francisco (bottom)
 Photos, top to bottom: SFGate, Ramona Fradon,
 The Cheese School of San Francisco*



2 | Curate the District's Retail (contd.)

THE RETAIL EXPERIENCE BEGINS ON THE STREET

The strategy recommends a coordinated program for businesses to stay open at night on a regular basis. Key nights in the off-tourist season will promote special events with pricing aimed at attracting local San Francisco and Bay Area residents.

The legalization of cannabis provides new opportunities and challenges to integrate an emerging set of business establishments into the fabric of the Wharf. The FWCBD's advisory committees will work to address location criteria, tourist education, and marketing efforts associated with the cannabis industry.

Successful retailers today must sell more than just products. They must also provide high-quality customer experiences that encourage interaction, stimulate the senses, and promote brand loyalty. The Wharf's retail experience already begins on the street, where an ever-changing array of outdoor performances and artistic displays create unforgettable experiences for customers and non-stop opportunities to people watch.

The strategy recommends that the art sub-district in the Western Gateway node be strengthened by activating events, innovative programming, and complemented by artistic lighting.

The strategy also recommends recruiting specific businesses that complement each retail node, with a particular focus on promoting and attracting locally-oriented businesses that will draw patronage from both residents and visitors alike. Many Bay Area businesses already make the Wharf their home, such as Lola SF, Elizabeth W, Boudin Bakery and Ghirardelli Chocolate.

Another goal is to further promote Bay Area based merchants to local residents, by expanding the Wharf's marketing efforts to broaden its customer base. By way of example, PIER 39 offers a "local advantage" program that provides exclusive discounts to local residents and features local business owners in promotional materials.

The FWCBD has been increasingly leveraging Facebook, Instagram, Twitter, and Yelp to spread the word about "what's happening at the Wharf". These social media outlets help attract new people to the Wharf by promoting special events.

*Adjacent to the new Cartoon Art Museum, the Franklin Bowles and other art galleries combined have the potential to create an art sub-district.
Photo: Franklin Bowles Gallery*



TWO-YEAR STRATEGIES

2.C.1 Include cannabis in the FWCBD Marketing Plan and work with property owners to identify potential and strategic cannabis retail locations in the district.



The Apothecarium, a medical cannabis dispensary with three locations in San Francisco, has garnered extensive support through responsible operations and community involvement. Photo: The Apothecarium



Fireworks on the Fourth of July bring thousands to PIER 39 and the Wharf. Photo: PIER 39



Unique offerings such as pão de queijo (Brazilian cheese bread) at Cafe de Casa on Leavenworth Street have the potential to bring customers from further afield IF they know about it. Photo: Yacamim

The Ferry Building showcases local makers, bakeries, farms, and restaurants in a uniquely San Francisco experience. Photo: Perkins+Will



Outdoor nighttime performances with light and fire build community and bring people together. Photo: Waterfire.org

3 | Connect to the Waterfront

WATERFRONT VIEWS THIS GOOD MUST BE CELEBRATED

Only one of San Francisco’s retail districts sits directly on the waterfront. A walk along the water offers a striking reminder - this place is different. Visitors and stakeholders all emphasize that the Wharf’s unique waterfront character, scenic views, and marine life are what they most treasure about Fisherman’s Wharf. While access to the waterfront has improved dramatically over the past decade, more remains to be done to create a well-lit path along the entire waterfront with new, exciting public spaces that encourage people to enjoy the Wharf through the evening.

The planned installation of artistic lighting on Pier 43 is a critical next step in enriching the Wharf’s night-time environment. The strategy recommends that additional lighting be installed along the central harbor and other key areas in the Wharf, including lighting displays to celebrate significant times of the year. These temporary and creative installations, like the annual WaterFire Providence installation in Rhode Island, should be combined with events that have the potential of bringing thousands of people to the Wharf. Year-round activities and events, coupled with special places to enjoy the waterfront, will reinforce the Wharf’s brand, increase its visibility, and draw more people to the Wharf throughout the entire year, especially at night.

The ferry arch at Pier 43 offers dramatic views of the Bay. Artistic lighting is proposed to bring greater attention to this historic asset.

GOALS

RESPONSIBLE PARTIES

- A** Develop a continuous, well-lit waterfront path
- B** Continue to encourage year-round activities and events along the Bay
- C** Promote enjoyment of the Bay through improved public spaces

PORT
FWCBD
MERCHANTS
OWNERS

*Goals and their associated two-year strategies are highlighted with green boxes



TWO-YEAR STRATEGIES

- 3.A.1 Use overhead string lighting to encourage nighttime activities, initially focusing on the inner harbor and Taylor Street (Bay to Jefferson)
- 3.A.2 Create clear markers so the route can be followed during the day
- 3.A.3 Install artistic lighting in key locations, starting with Pier 43



*A renovated trail with café lighting at Lake Merritt in Oakland has increased nighttime waterfront usage and economic activity in the area.
Photo: Scott Hargis Photography*



*Waterfront boardwalk with café seating in Amsterdam, Netherlands.
Photo: Danny Yadegar*



The San Francisco Maritime National Historical Park, with beach access and amphitheater seating, offers an opportunity for water-based performances.

4 | Promote the Wharf's Uniqueness

TOURISTS, MEET FISHERMEN. FISHERMEN, MEET TOURISTS

The Wharf is unique among international destinations, serving as both a working waterfront for fishermen and processors as well as a vibrant tourist destination with colorful attractions. On the waterfront, fishermen are now allowed to sell fresh caught fish directly from their boats, generating crowds of a few thousand people each weekend.

The focus of the following strategies is to reinforce and leverage what is most unique about the Wharf. These strategies focus on increasing the visibility of fishing and fishing-related activities and sales as well as enhancing lighting throughout the district, particularly along the waterfront. Finally, upgrading and enhancing district-wide signage that reinforces the Fisherman's Wharf brand and highlighting the district's gateway entrances to better promote the Wharf and provide a sense of arrival.

Fisherman's Wharf is unique in its dual function as a commercial harbor and tourist waterfront.



RESPONSIBLE PARTIES

GOALS

- A** Increase visibility of fishing activities and access to **fish sales**
- B** Improve awareness of Wharf's **unique character** (signage, banners, Wharf walk, lighting)
- C** Enhance **gateway entrances** to better celebrate the Wharf and provide a sense of arrival

PORT
FWCBD

*Goals and their associated two-year strategies are highlighted with green boxes

TWO-YEAR STRATEGIES

- 4.A.1 Improve access to commercial boats for expected increase of off-boat sales
- 4.A.2 Organize events where visitors can interact directly with fishermen
- 4.A.3 Assist with the development of a fish market



Heavy tourism alongside a commercial fishing harbor makes Fisherman's Wharf internationally unique. Increased interaction between fishermen and tourists is seen as an opportunity to strengthen the district's brand.

Photo: Hallahan



*Pike Place Market in Seattle, world renown for its fish market, connects tourists with fishermen through performances and challenging them to catch fish!
Photo: Al Hernandez*



Historic artifacts and signage can help connect visitors with the district's maritime roots.



Off-boat fish sales are expected to increase activity at The Wharf's inner harbor, located along Jefferson Street.

5 | Enhance the Public Experience

IT'S HARD TO IMAGINE A PLACE WITH MORE TO SEE AND DO

In collaboration with surrounding property owners, the FWCBD has been activating the historic Cannery Courtyard with special events since the summer of 2017. We recommend continuing this programming and possibly expanding it to additional locations such as Pier 43 and the proposed plaza at the corner of Jefferson and Taylor Streets. New events, performances, and unique installations will continue to provide reasons for visiting the Wharf, and can be strategically implemented during the times of day or year when visitation is typically at its lowest.

With all of the successful initiatives, the FWCBD has identified additional projects to further enhance the public experience. The pathways behind Jefferson Street are currently being explored as opportunity areas for creative lighting. Enhanced lighting will improve the Wharf's nighttime environment and support businesses that offer extended hours. Artistic lighting will also enhance the Port's uniqueness, such as the Port's planned light installation at Pier 43 that will illuminate its iconic arch.

The success of Fisherman's Wharf also depends on the actual and perceived safety visitors have when visiting the district. The FWCBD should continue to work on the safety and security of the district and partner with public and private entities to outreach to the street population.

GOALS

RESPONSIBLE PARTIES

A Organize **rotating events**, performances, and art installations

FWCBD
MERCHANTS
PORT
OWNERS

B Continue to **address street life and public safety** through advocacy and additional security

FWCBD
PORT
OWNERS
MERCHANTS

C Enhance **lighting** throughout the Wharf, including innovative artistic lighting installations

*Goals and their associated two-year strategies are highlighted with green boxes

TWO-YEAR STRATEGIES

- 5.A.1 Identify locations, such as the Cannery Courtyard, to schedule unique, one-off events
- 5.A.2 Partner with production partners to host events
- 5.A.3 Targeted marketing through social media to specific demographic groups



Wharf Fest is a collaboration between FWCBD and Steven Restivo Event Services. In 2017, its 5th year, the event drew nearly 65,000 people, a 10% increase from the previous year.

San Francisco Police Department beat officers.

- 5.B.1 Continue funding for private security and SFPD beat officers to maintain public safety
- 5.B.2 Install lighting in places where transients tend to congregate
- 5.B.3 Help educate the community about City programs and improve utilization of these programs in the Wharf



A public art installation with illuminated seesaws in Montreal encourages interaction through motion-activated tones. Photo: Ulysse Lemerise



The "World's Largest Onesie Pub Crawl" was attended by over 700 people. VIP California threw the event in collaboration with the Fisherman's Wharf CBD. Such events bring new customers to the district. Photo: funcheapSF.com

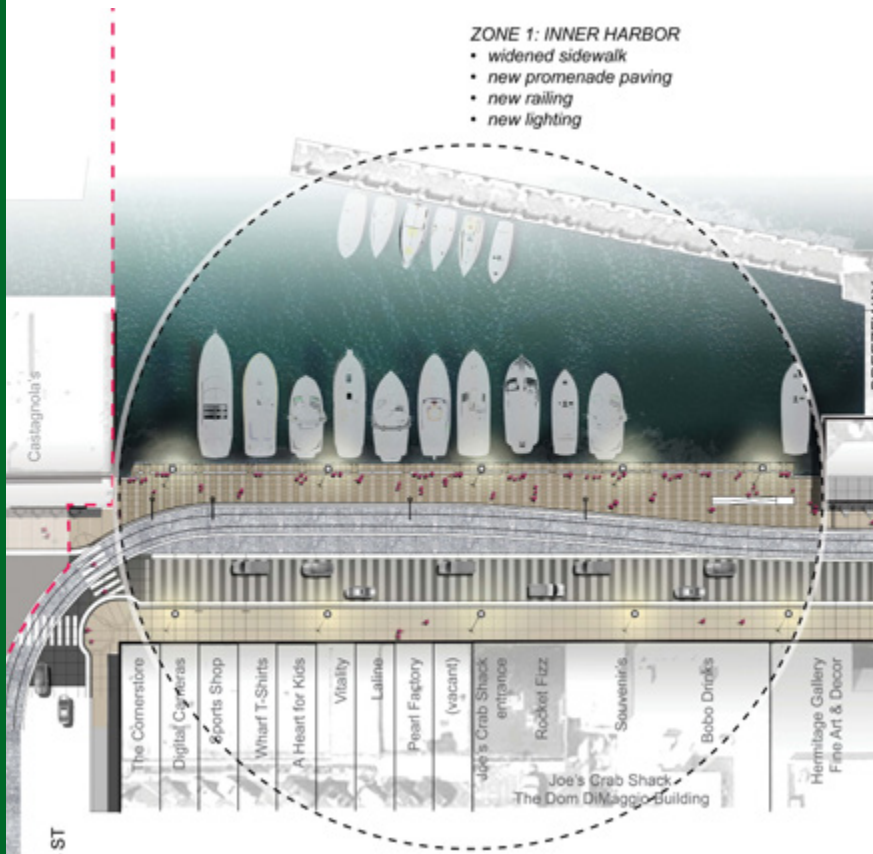


Services at a Project Homeless Connect event include dental care, eyeglasses, HIV testing, housing information, food, hygiene products and more. It is important for homeless individuals to know such resources exist. San Francisco, CA Photo: Project Homeless Connect

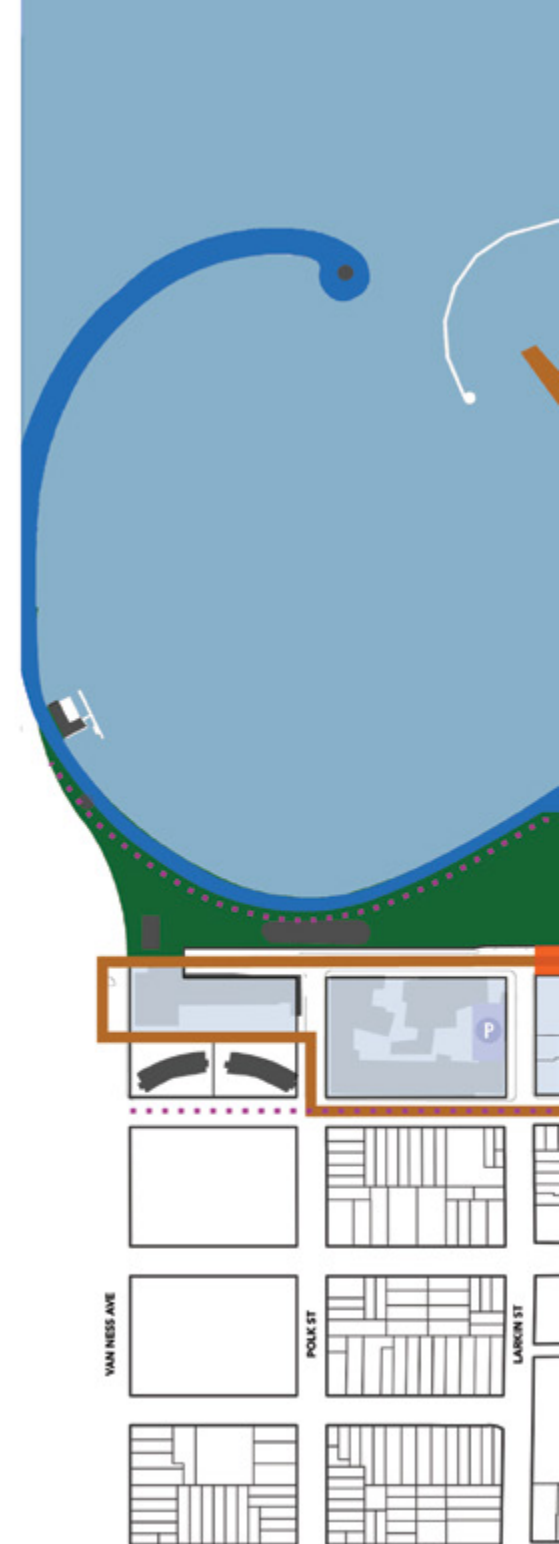
Key Opportunity Areas

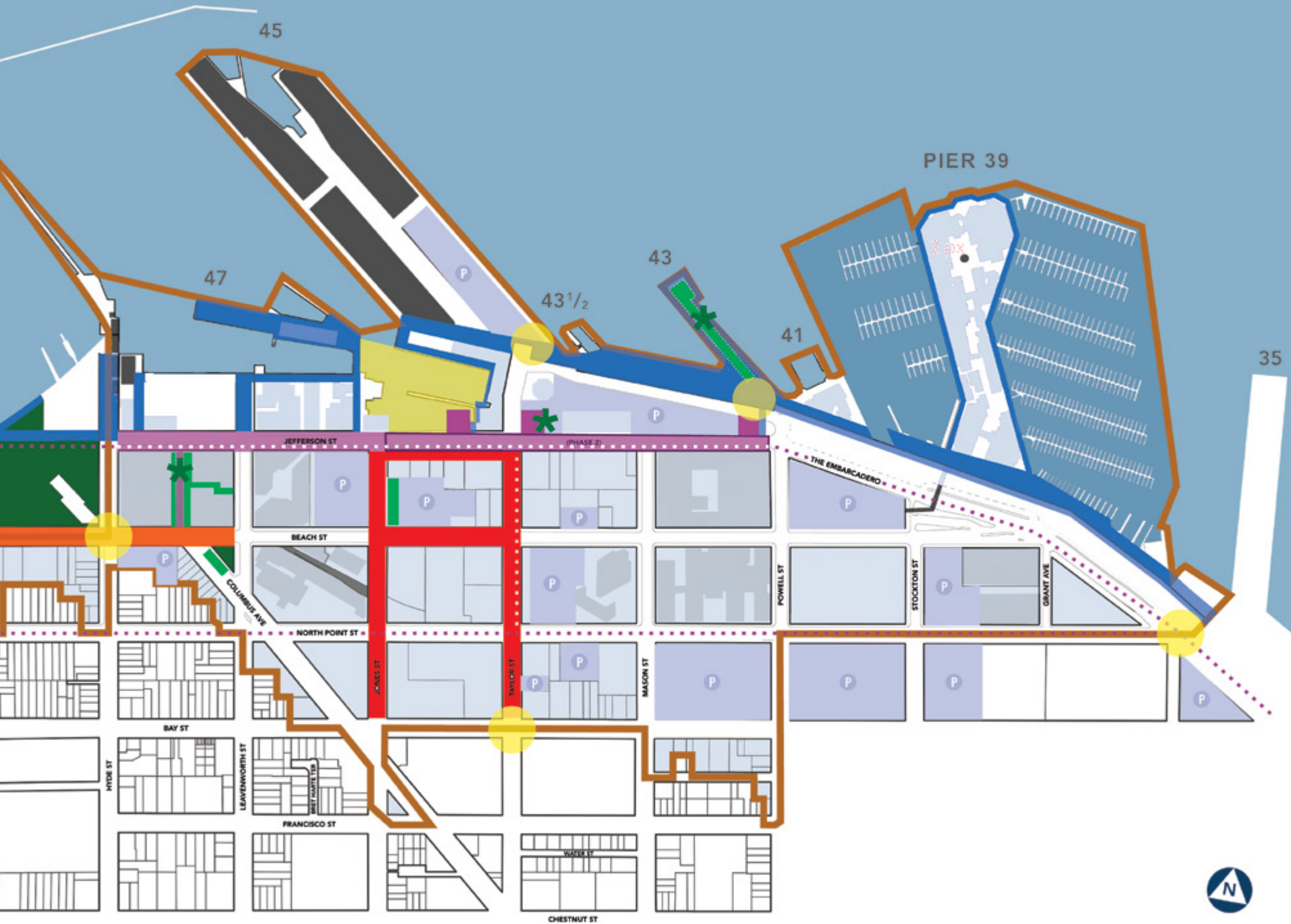
The retail strategy recommendations for Fisherman's Wharf are focused on improvements that will enhance the customer experience by promoting better connections to the waterfront and its fishing industry, expand retail offerings and attractions to grow the customer base, develop a world-class public realm, and facilitate better transit, pedestrian, and bike access to the Wharf.

The opportunities map shows where the recommended objectives and goals will be accomplished in the Wharf.



*Jefferson Streetscape Improvements Phase II
Image: City of San Francisco*





Recommendations Recap

The following recommendations recap the information shared between pages 48-61.

These Retail Strategy recommendations were developed through ongoing meetings with the Retail Strategy Task Force, which represents a broad spectrum of property owners and merchants in Fisherman's Wharf, as well as surveys of patrons, interviews, focus groups, and market analysis.

Some goals will require ongoing management and will take up to 4-5 years to complete. We have called out those that should be priorities for the next two years. Those goals are highlighted in green.

Implementation of these strategies depends on our collective participation to make them happen.



T IMPROVE WHARF APPEARANCE & CONNECTIVITY

- A** Implement existing plans for urban design improvements per **Public Realm Plan**
- B** Leverage public investment to stimulate more private investment by property owners and businesses
- C** Enhance pedestrian and bicycle connectivity to surrounding neighborhoods
- D** Improve transit service to Wharf, particularly in high season and at night
- E** Make more efficient use of existing parking



2 CURATE THE DISTRICT'S RETAIL

- A** Promote retail recruitment by providing **targeted information to the brokerage community** on a quarterly basis
- B** Expand nighttime activity through new leases and commitments from existing businesses to stay **open at night**
- C** Create an overall **strategy on addressing cannabis in the district**, regarding locations, tourist education, and marketing
- D** Strengthen growing **art sub-district** and promote art at the Wharf
- E** Actively recruit specific types of businesses to fit the needs of district retail nodes, with a focus on attracting new **locally-oriented businesses** to the Wharf
- F** Expand existing marketing efforts to **broaden customer base**

3 CONNECT TO THE WATERFRONT

- A** Develop a continuous, **well-lit waterfront path**
- B** Continue to encourage year-round activities and **events along the Bay**
- C** Promote enjoyment of the Bay through **improved public spaces**

4 PROMOTE THE WHARF'S UNIQUENESS

- A** Increase visibility of fishing activities and access to **fish sales**
- B** Improve awareness of Wharf's **unique character** (signage, banners, Wharf walk, lighting)
- C** Enhance **gateway entrances** to better celebrate the Wharf, and provide a sense of arrival

5 ENHANCE THE PUBLIC EXPERIENCE

- A** Organize **rotating events**, performances, and art installations
- B** Continue to **address street life and public safety** through advocacy and additional security
- C** Enhance **lighting** throughout the Wharf, including innovative and artistic lighting installations

Two-Year Priorities Recap

1A Implement existing plans for urban design improvements per Public Realm Plan

FWCBD
Port

1. Assist in securing funding and planning approval to initiate construction of the Jefferson St. Phase II Public Realm Plan, which would further improve Jefferson Street and build a public plaza at Taylor and Jefferson

1B Leverage public investment to stimulate more private investment by property owners and businesses

FWCBD
Merchants
Port
Owners

1. Implement new upgrades to facades, awnings, signage, lighting, and window displays to stimulate new retail sales, particularly in the heart of the Wharf
2. Promote access to city programs offered by the Office of Small Business, Office of Economic and Workforce Development and SF Environment (including Energy Watch Program) at the Wharf

2A Promote retail recruitment by providing targeted information to the brokerage community on a quarterly basis

FWCBD

1. Showcase new businesses that have opened at the Wharf
2. Announce vacant retail space opportunities
3. Provide relevant information that helps to promote retail success

2B Expand nighttime activity through new leases and commitments from existing businesses to stay open at night

FWCBD
Merchants
Port
Owners

1. Establish priority areas to focus nightlife, starting with major shopping centers and businesses along Jefferson Street
2. Develop coordinated strategy to implement regular nighttime hours and events at least one night each month
3. Leverage excitement around new late night tenants by organizing evening events and increasing foot traffic to existing establishments open at night
4. Enhance social media campaign to promote "Night-time at the Wharf"

2c Create an overall strategy addressing cannabis in the district, including locations, tourist education, and marketing

FWCBD

5. Include cannabis in the FWCBD Marketing Plan and work with property owners to identify potential and strategic cannabis retail locations in the district

3A Develop a continuous, well-lit waterfront path

**Port
FWCBD
Merchants
Owners**

1. Use overhead string lighting to encourage nighttime activities, initially focusing on the inner harbor and Taylor Street (Bay to Jefferson)
2. Create clear markers so route can be followed during the day
3. Install artistic lighting in key locations, starting with Pier 43

4A Increase visibility of fishing activities and access to fish sales

**Port
FWCBD**

1. Improve access to commercial boats for expected increase of off-boat sales
2. Organize events where visitors can interact directly with fishermen
3. Assist with the development of a fish market

5A Organize rotating events, performances and art installations

**FWCBD
Merchants
Port
Owners**

1. Identify locations, such as the Cannery Courtyard, to schedule unique, one-off events
2. Partner with production partners to host events
3. Targeted marketing through social media to specific demographic groups

5B Continue to address street life and public safety through advocacy and additional security

**FWCBD
Port
Owners
Merchants**

1. Continue funding for private security and SFPD beat cops to maintain public safety
2. Install lighting in places where transients tend to congregate
3. Help educate the community about city programs and improve utilization of these programs in the Wharf

ACKNOWLEDGMENTS AND RESOURCES



ACKNOWLEDGMENTS

Fisherman's Wharf Community Benefit District (FWCBD)

FWCBD Retail Strategy Task Force

City and County of San Francisco
Port of San Francisco
National Park Service

Consultant Team

Seifel Consulting [Libby Seifel, Danny Yadegar, Shay Fitzpatrick]
lowercase productions [Dan Reider]

Commercial Brokerage Community

Colliers International
Cushman & Wakefield
Greensfelder Commercial Real Estate
Lockhouse Retail Group
Ronin Commercial Real Estate
Vandermade Commercial Real Estate

Numerous residents, business owners, property owners, real estate brokers, and community members who provided input into the Retail Strategy and the various plans that are helping to shape the district.

RESOURCES

Fisherman's Wharf Community Benefit District

www.fwcdbd.com

Fisherman's Wharf Retail Strategy

www.fwretailstrategy.com

Fisherman's Wharf Visitor Website

www.visitfishermanswharf.com

Jefferson Street Development

www.fwcdbd.com/jefferson-street-development/

- Report on Jefferson Street, Phase I (2015)
- Public Realm Plan for Fisherman's Wharf (2010)
- Public Space & Public Life at Fisherman's Wharf (2008)

SF Travel

<http://www.sftravel.com>



A project of the

Fisherman's WHARF

COMMUNITY BENEFIT DISTRICT

2018