

HOPE SF Neighborhood Analysis

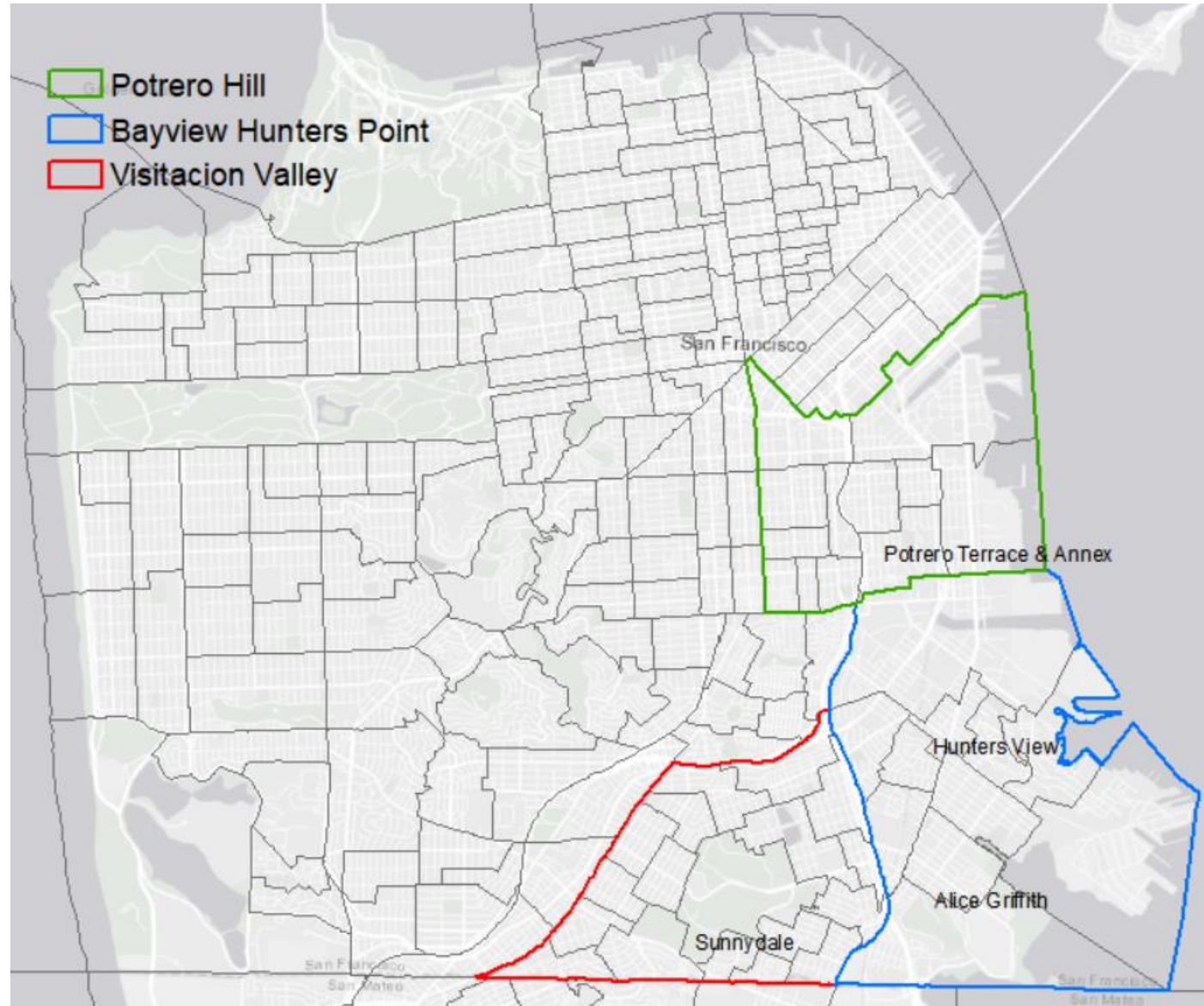
Carolina Reid and Sam Giffin

DRAFT December 11, 2018 – For Internal Distribution Only

Introduction

- The four HOPE SF sites are embedded within neighborhoods that are undergoing rapid demographic and socio-economic change. These changes have implications for the economic opportunities—and challenges—that HOPE SF residents face
 - Research has consistently shown that we cannot consider place-based redevelopment as independent of broader economic and social forces
- In this PPT, we present data on what is happening in the broader neighborhoods surrounding the HOPE SF sites
 - We look forward to having the opportunity to discuss these data trends, but also hope that some of the charts/figures will be useful to the HOPE SF team as they prepare grant applications and/or other reports

Hope SF Neighborhood Boundaries

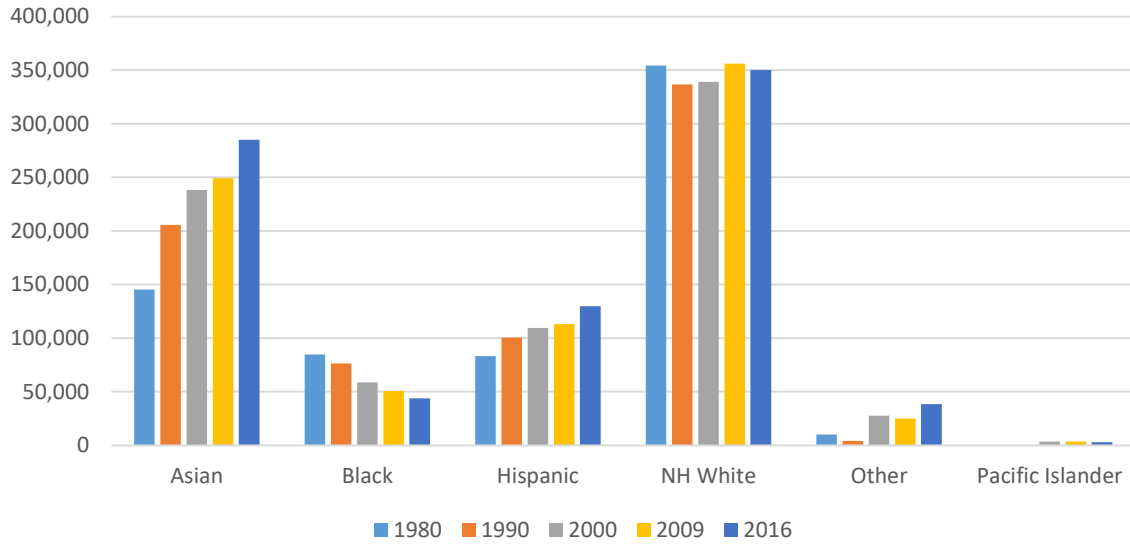


Population Trends

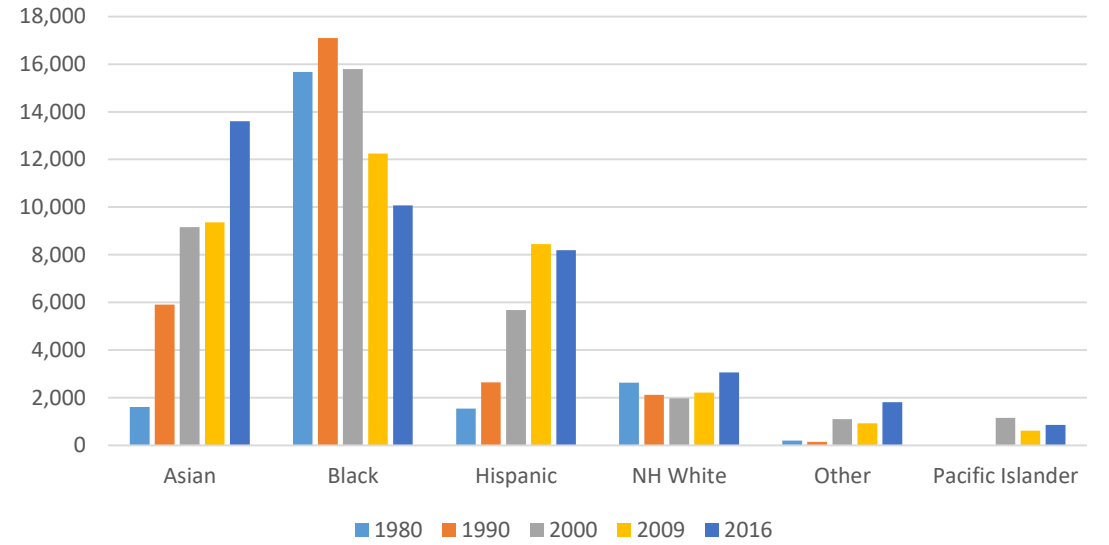
- Since 1980, the most dramatic change in San Francisco has been the growth in the Asian population
 - At the same time, the Black population has declined from 12.5% to 5% (or 85,000 to 44,000)
- This dynamic is magnified in the Bayview
 - In Bayview the Black population declined from 72% in 1980 to 27% in 2016 (or from approximately 16,000 to 10,000 individuals)
- While the Hispanic population has increased overall, it has decreased in Potrero Hill since 2000
- The non-Hispanic White population has increased rapidly in Potrero Hill and declined significantly in Visitacion Valley

Population, by Race/Ethnicity, 1980 to 2016

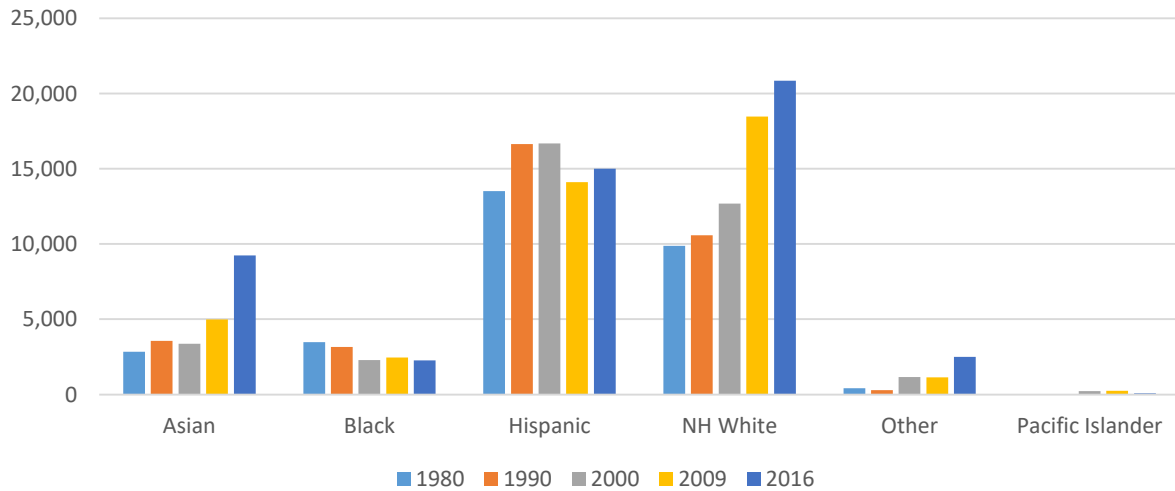
San Francisco



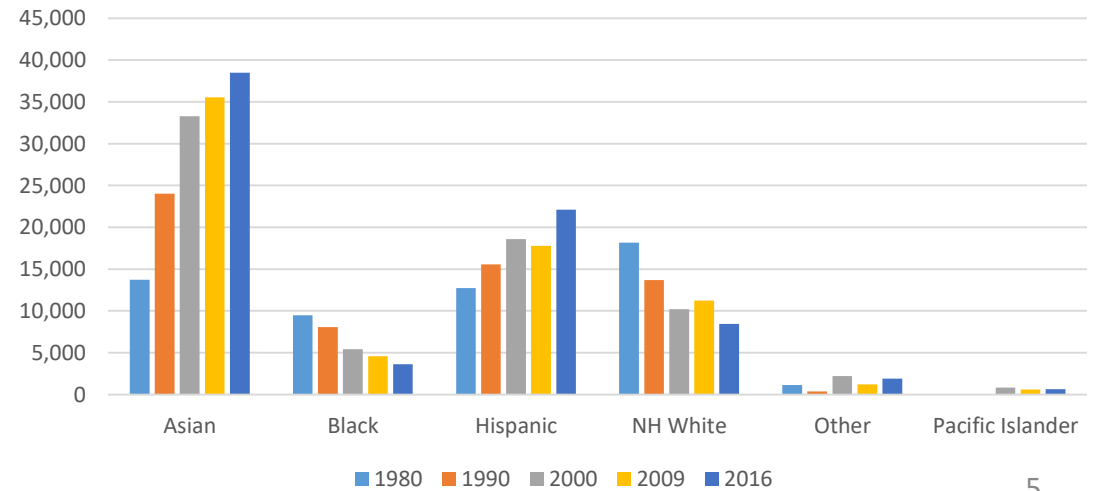
Bayview Hunters Point



Potrero Hill



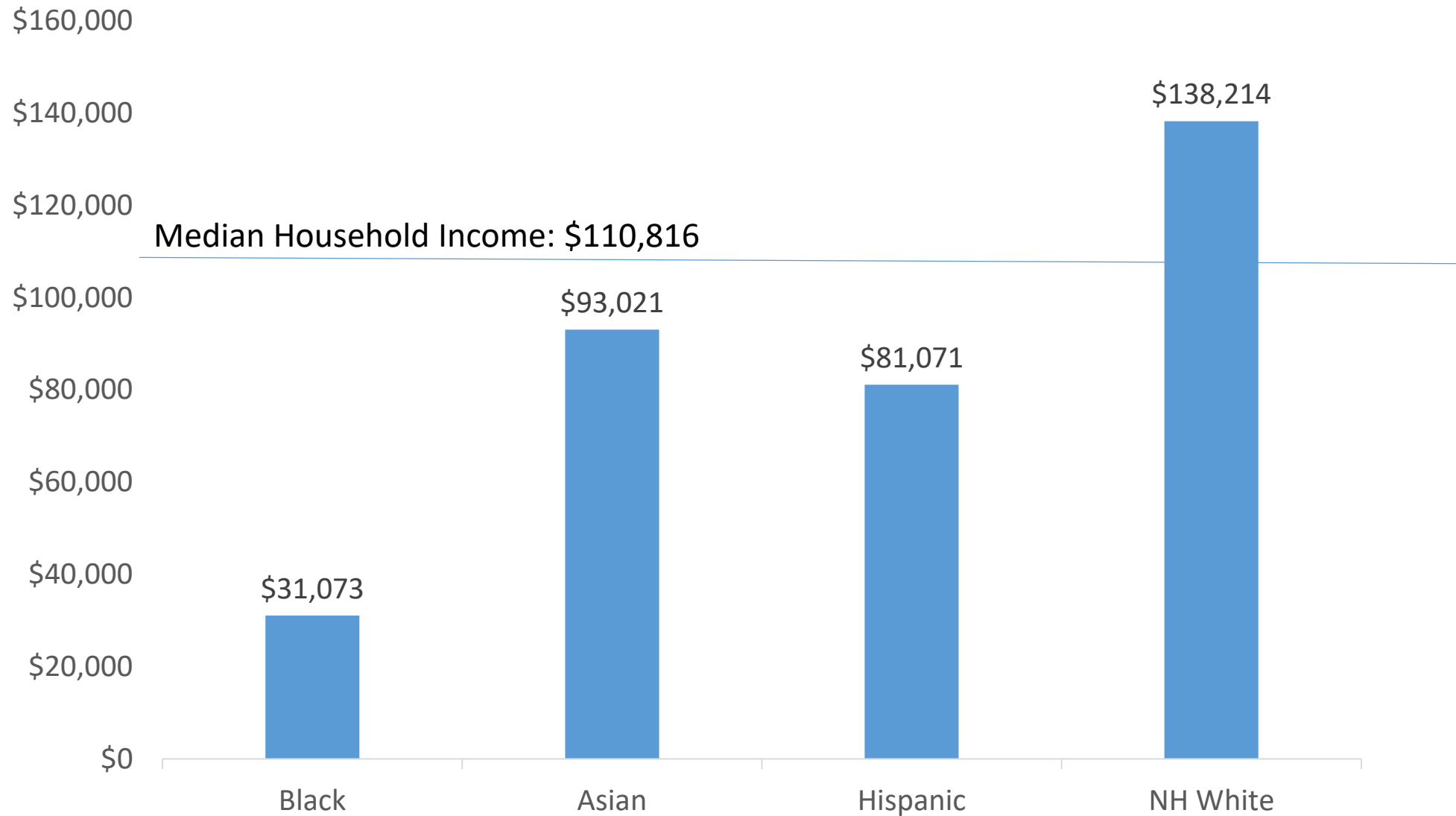
Visitacion Valley



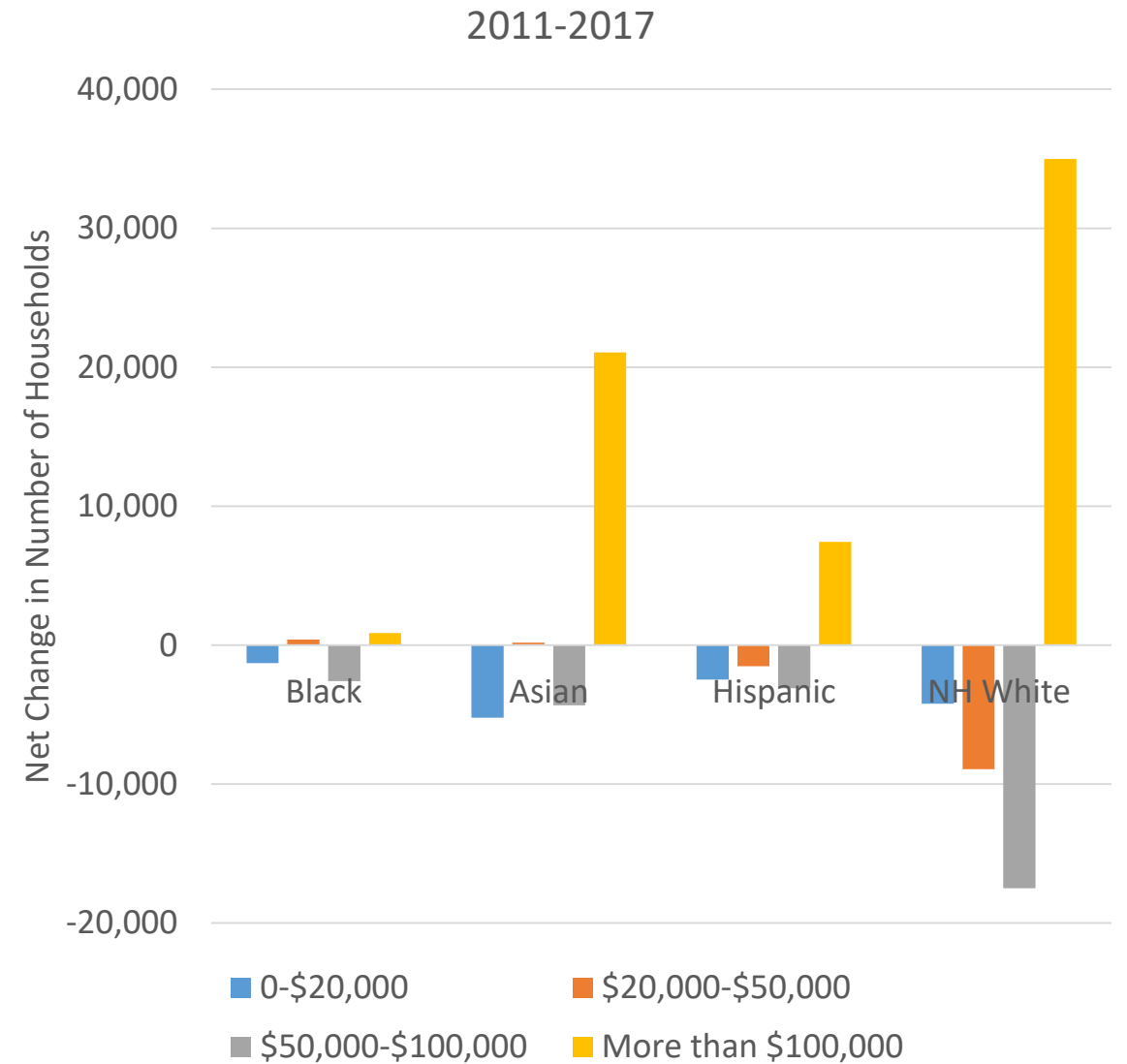
Socio-Economic Trends

- Overall household median income in San Francisco is \$110,816 (2017)
 - There are large racial disparities in median household income
- While the 2000s were characterized by generally little change in the incomes of who lived in the city, since the recession, there has been a dramatic shift
 - Since 2011, the number of households earning at least \$100,000 increased by over 60,000 (primarily among Non-Hispanic White and Asian households)
- HOPE SF neighborhoods have experienced an increase in the share of African Americans that are low-income, while at the same time increases in the share of *high-income* Asians and Whites
 - This has the potential to exacerbate exclusionary race and class dynamics, above and beyond what is happening with mixed-income redevelopment at the sites themselves

Median Household Income in 2017 in San Francisco by Race

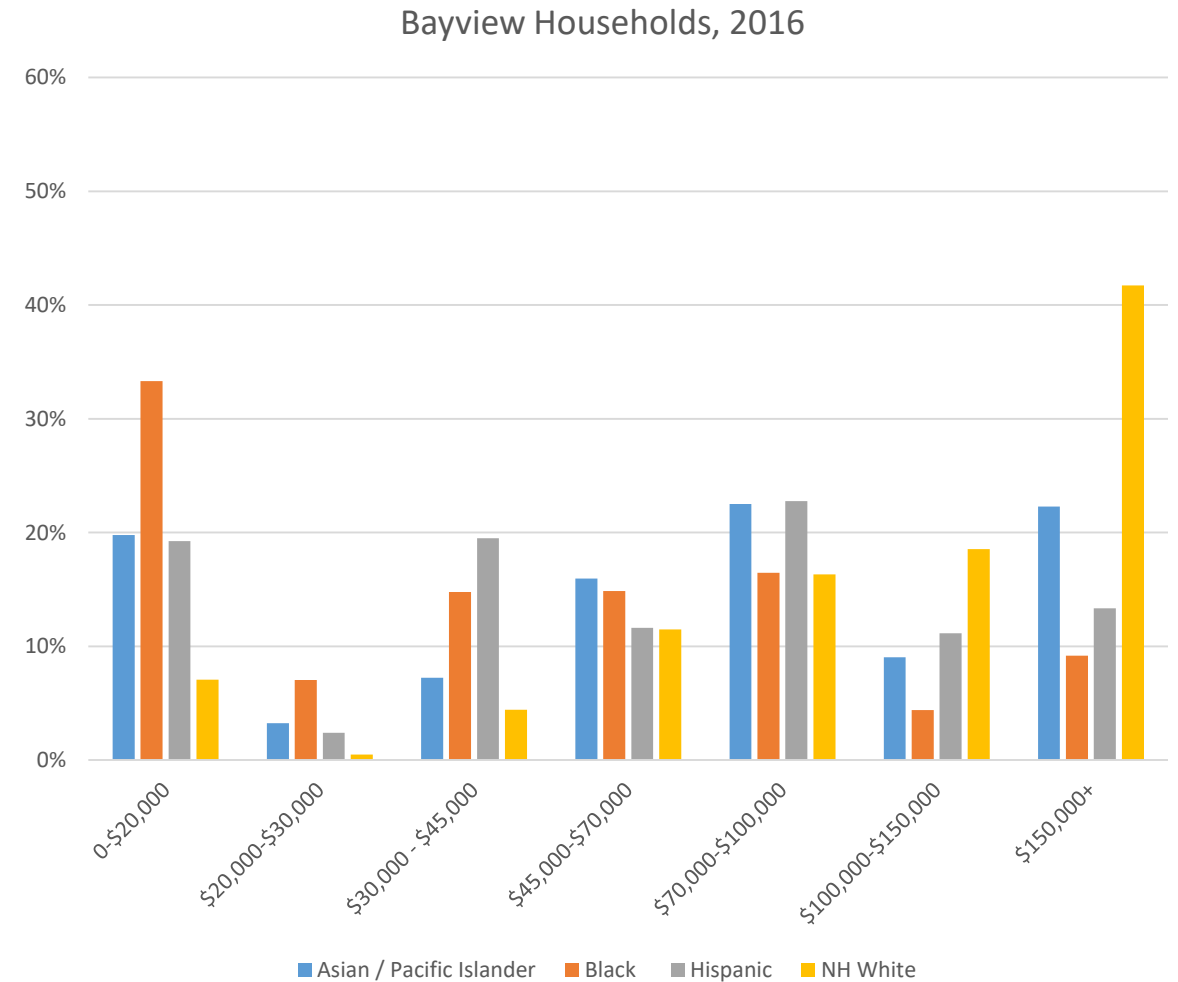
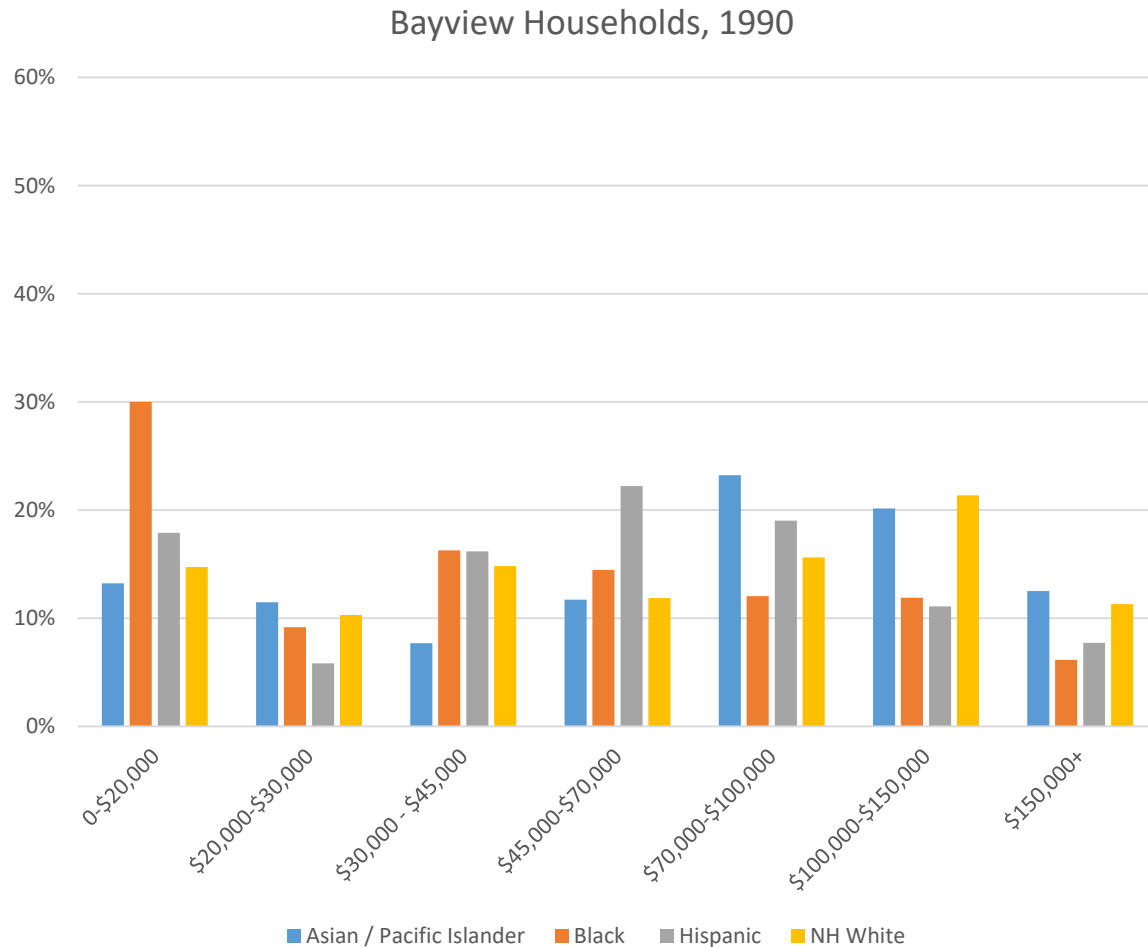


Change in San Francisco Households by Income and Race, 2000-2011 and 2011 - 2017

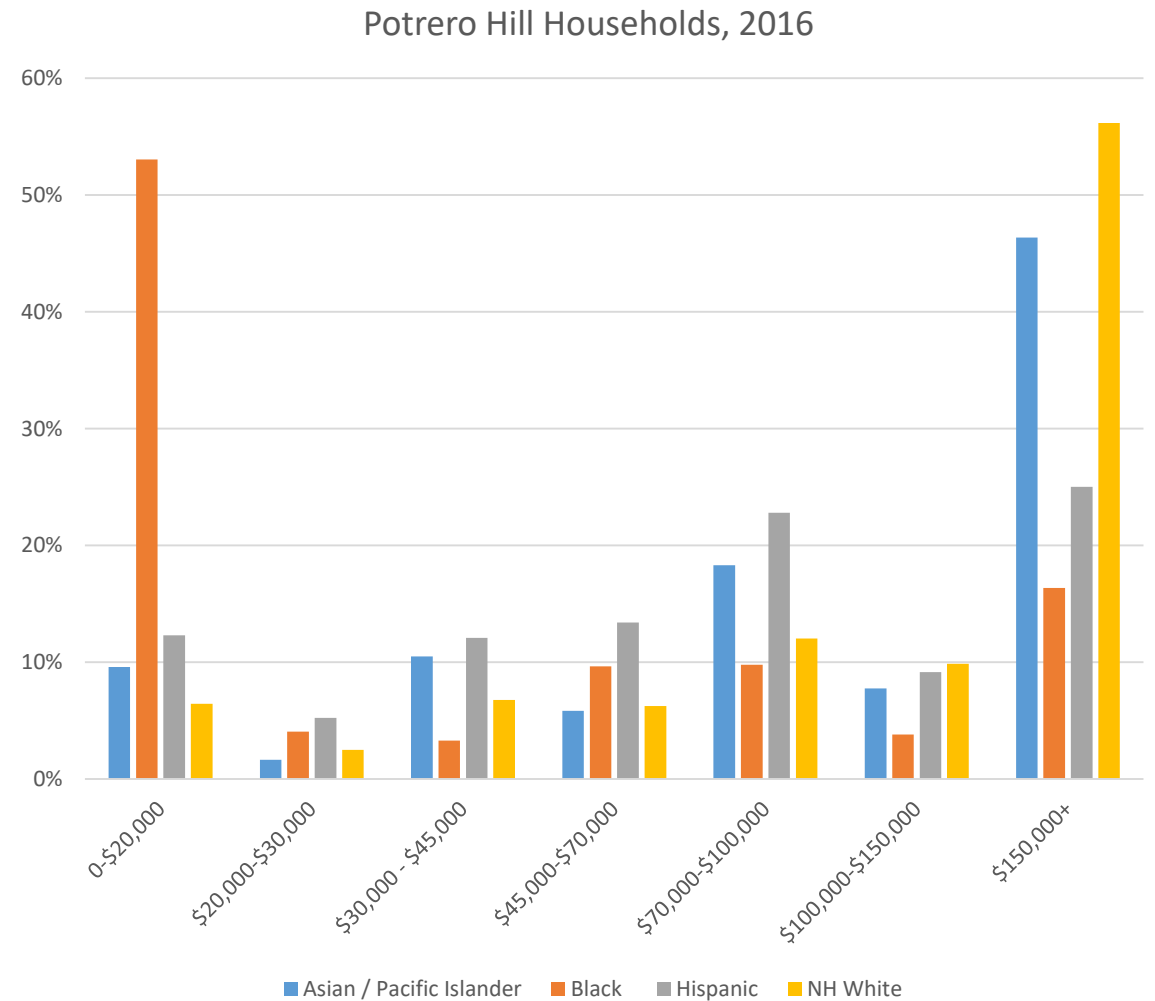
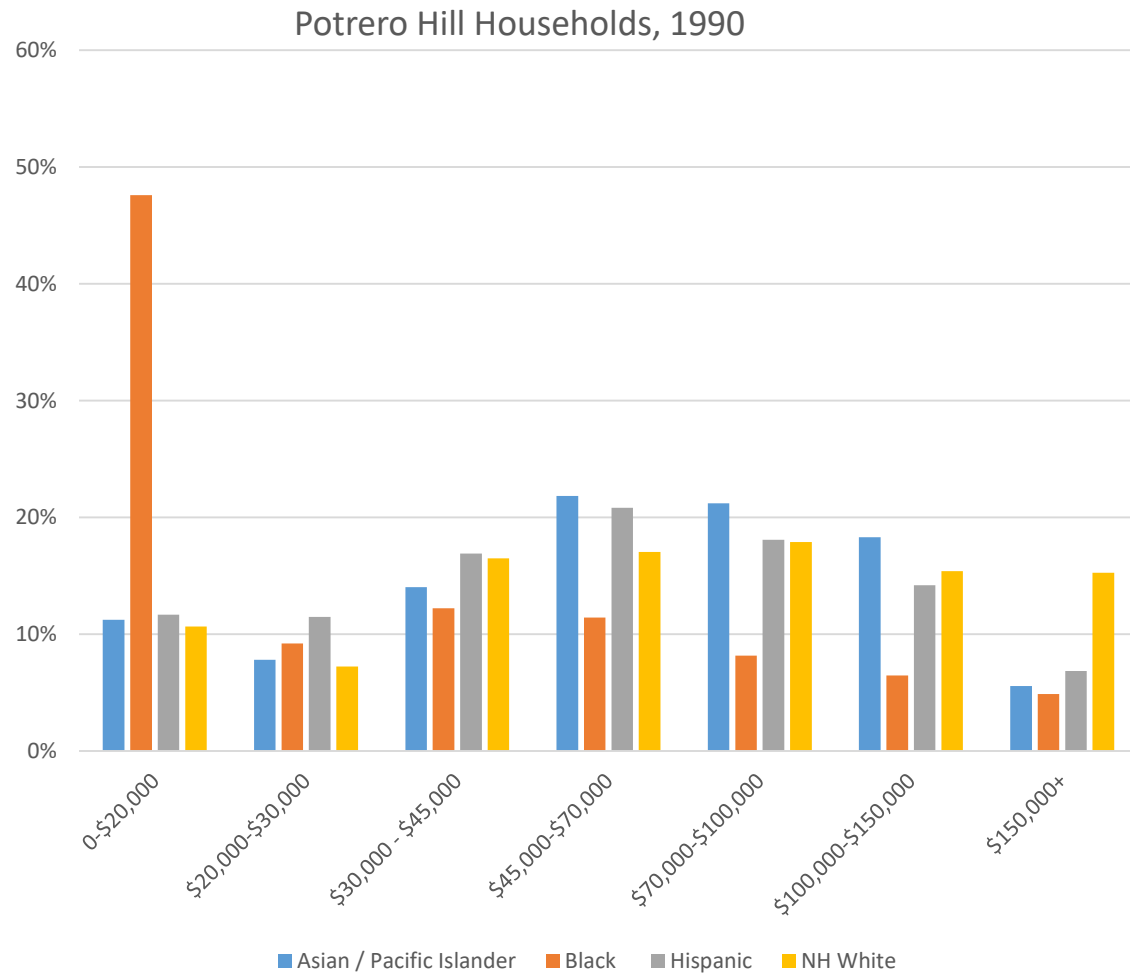


All data adjusted for inflation to 2017\$.

Bayview Distribution of Household Income by Race/Ethnicity, 1990 and 2016 (in 2016 dollars)

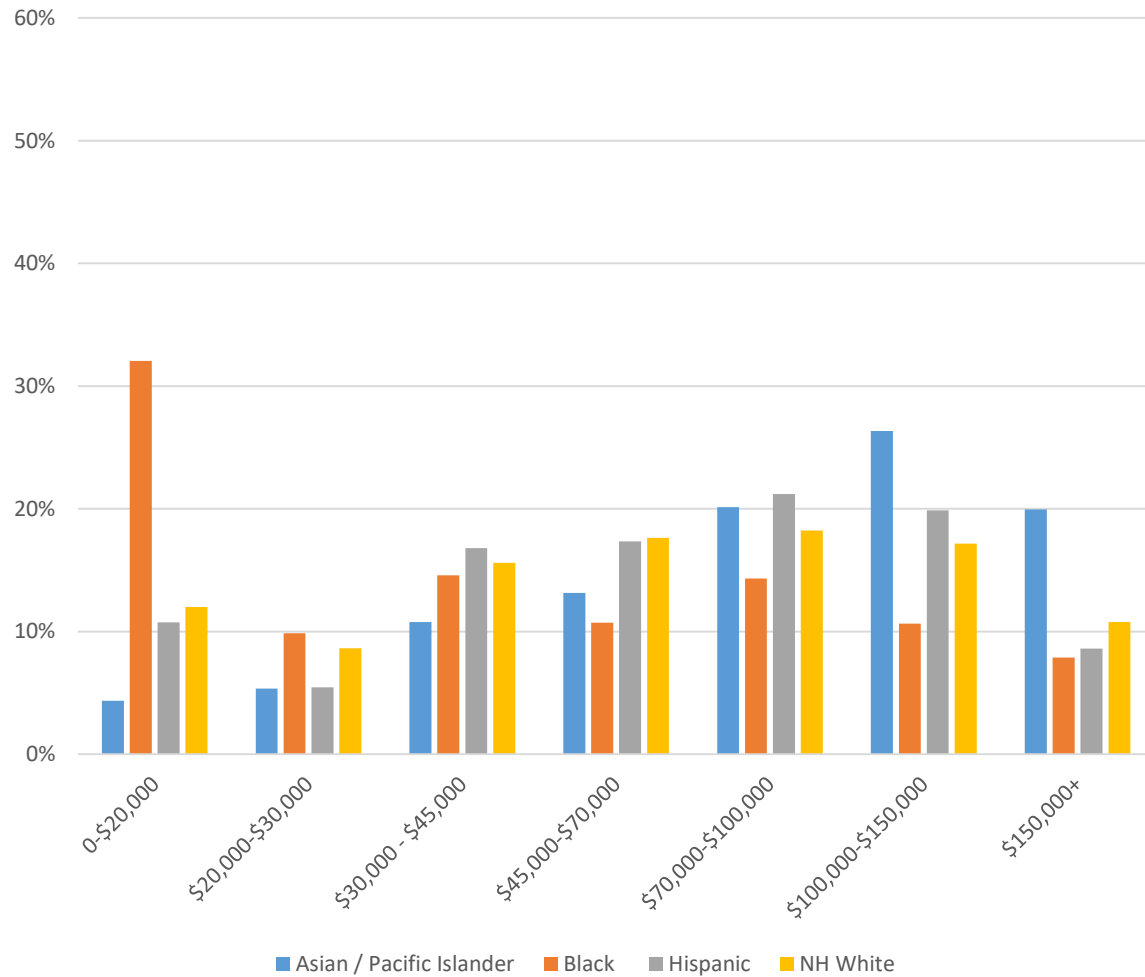


Potrero Hill Distribution of Household Income by Race/Ethnicity, 1990 and 2016 (in 2016 dollars)

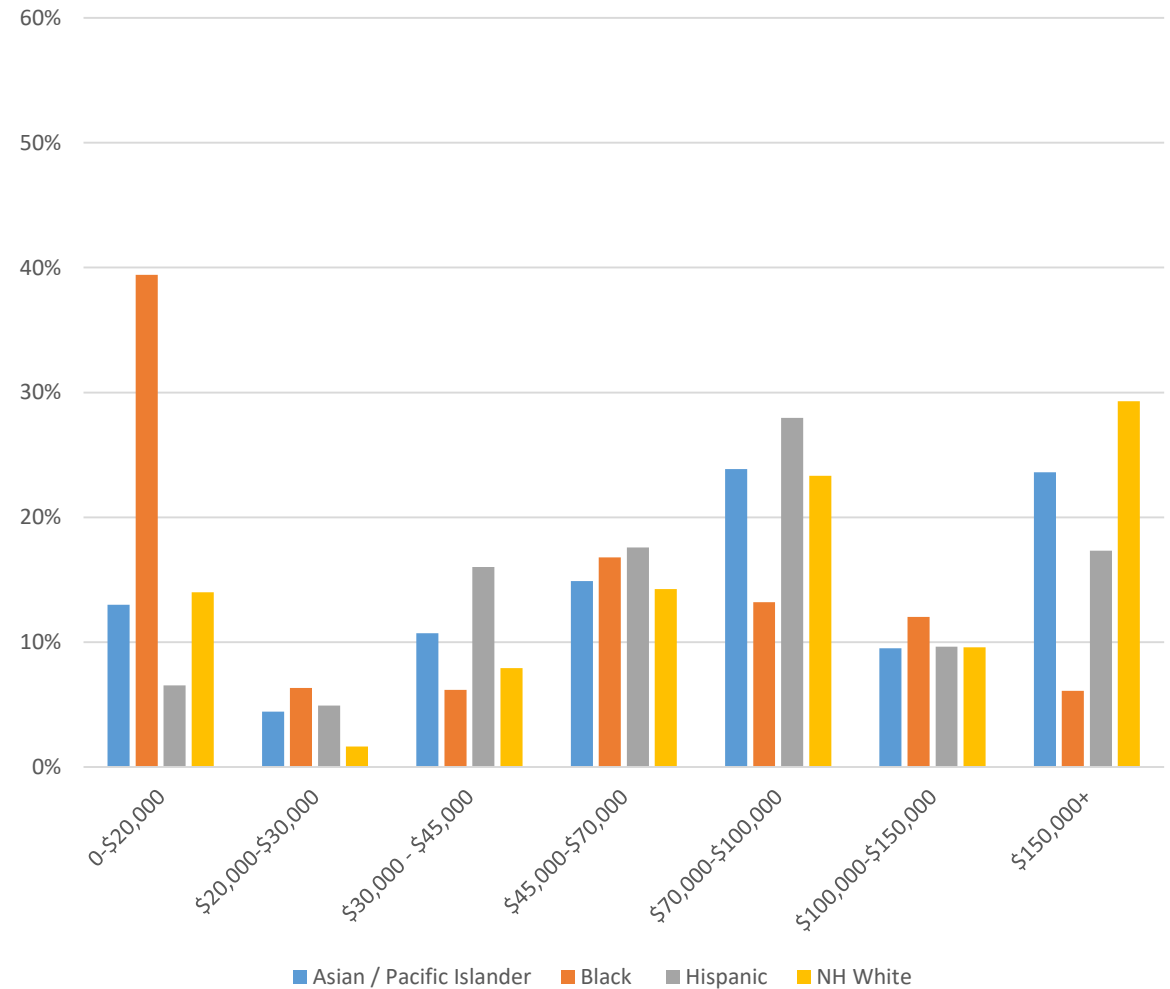


Visitacion Valley Distribution of Household Income by Race/Ethnicity, 1990 and 2016, (in 2016 dollars)

Visitacion Valley Households, 1990



Visitacion Valley Households, 2016

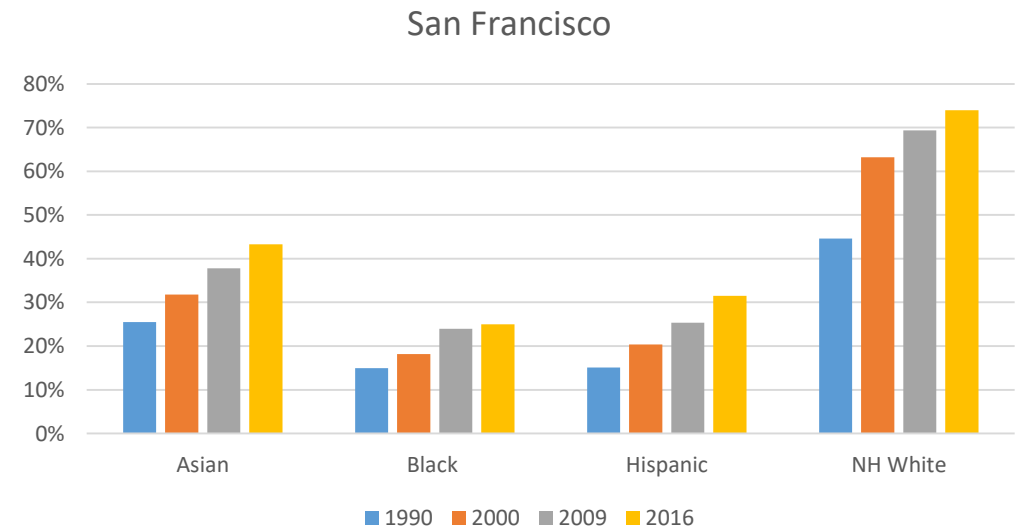
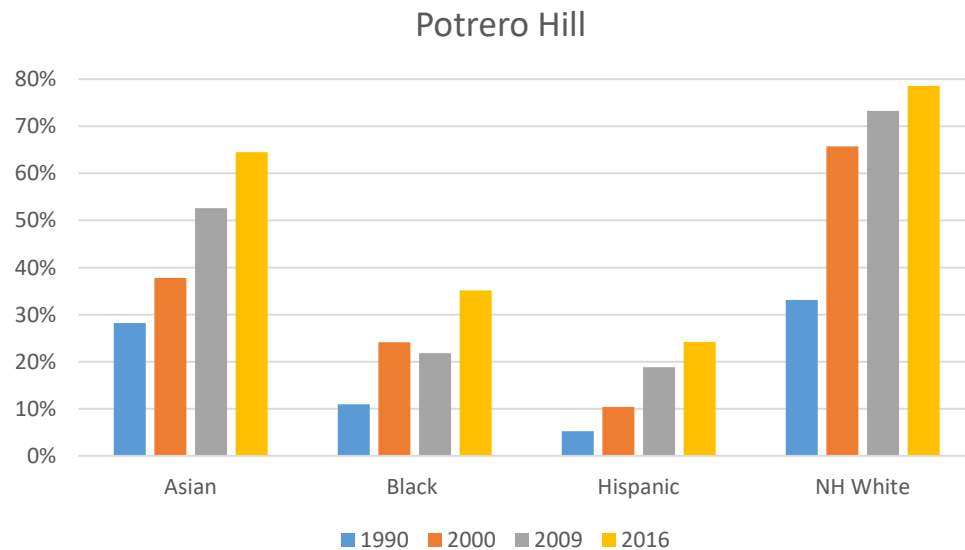
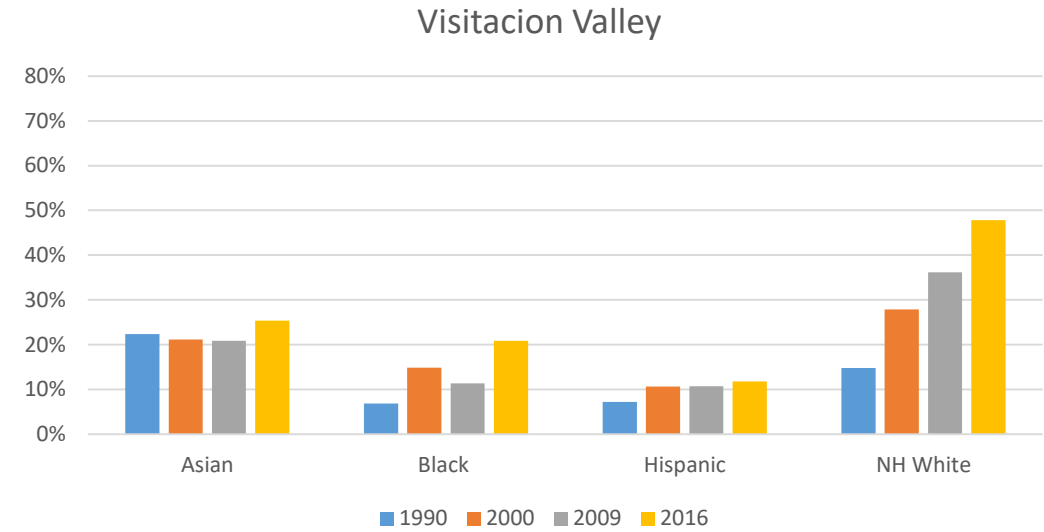
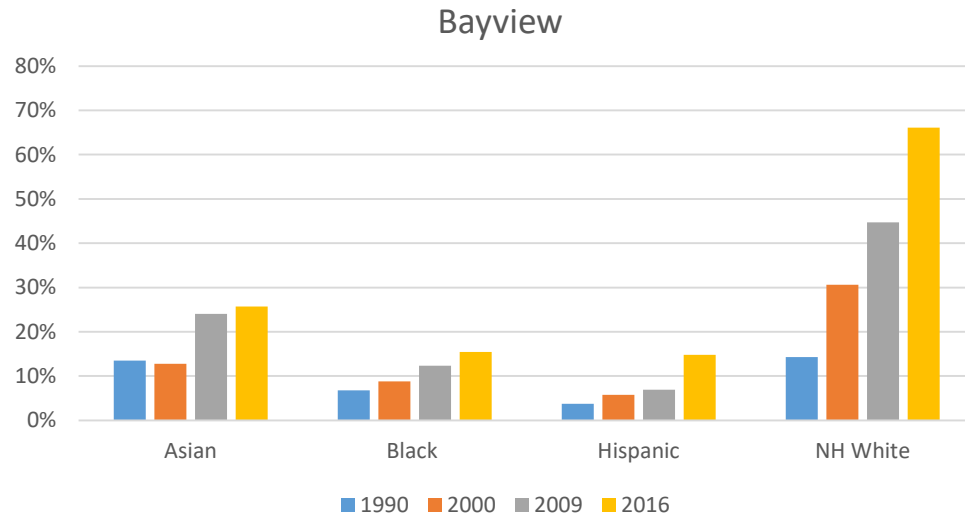


Other Trends

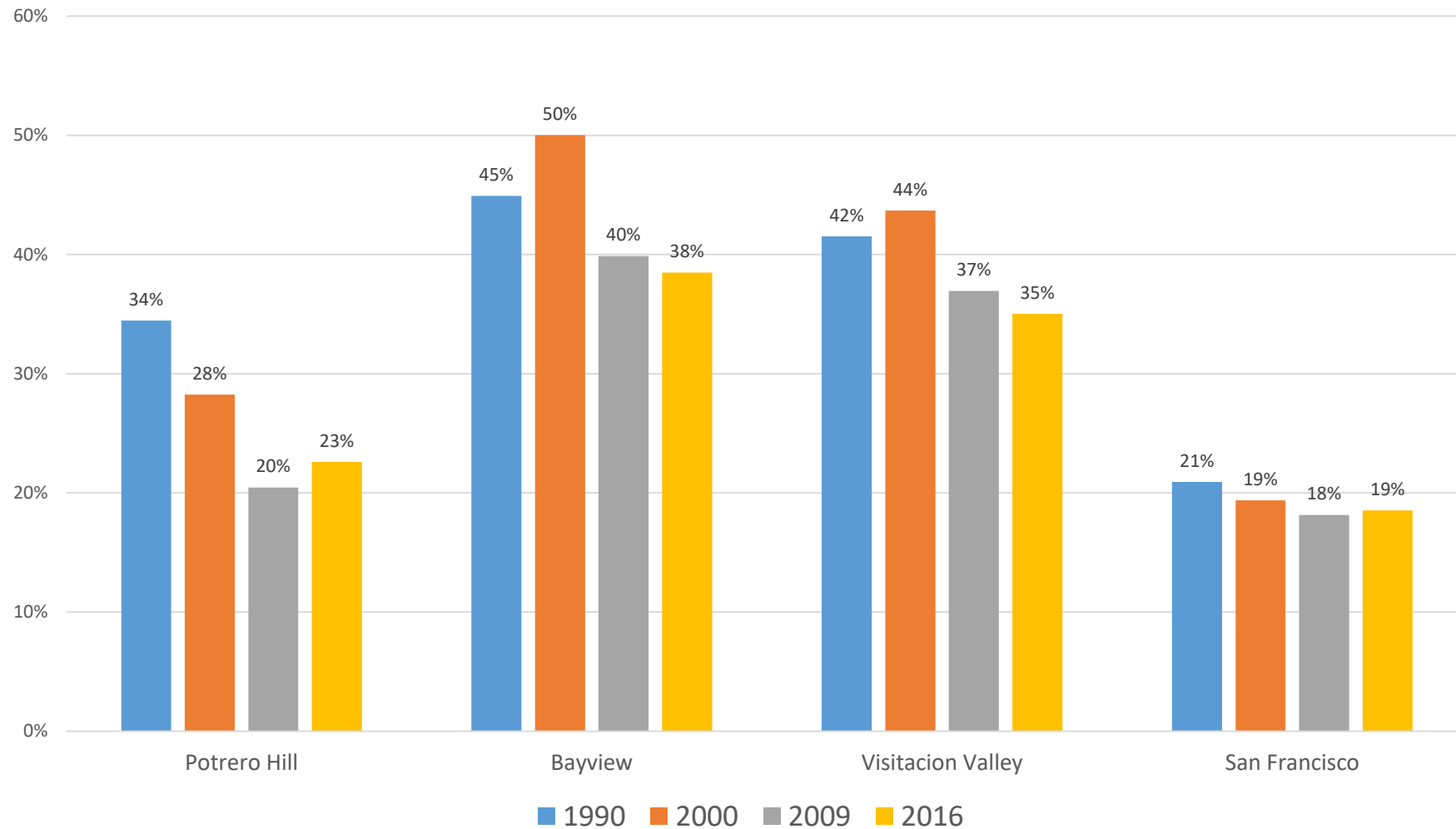
- With the exception of Potrero Hill, HOPE SF neighborhoods have a smaller share of adults with bachelor's degrees or higher
- HOPE SF Neighborhoods have a greater share of households with children than the rest of San Francisco, especially in the Bayview and Visitacion Valley
 - However, with the exception of Potrero, the share of households with children has been declining consistently over time

Educational Attainment by Race, 1990 to 2016

Percent of Individuals over 25 with a Bachelors Degree or Higher



Household Composition: Share of households with children, 1990 to 2016



Economic Opportunity

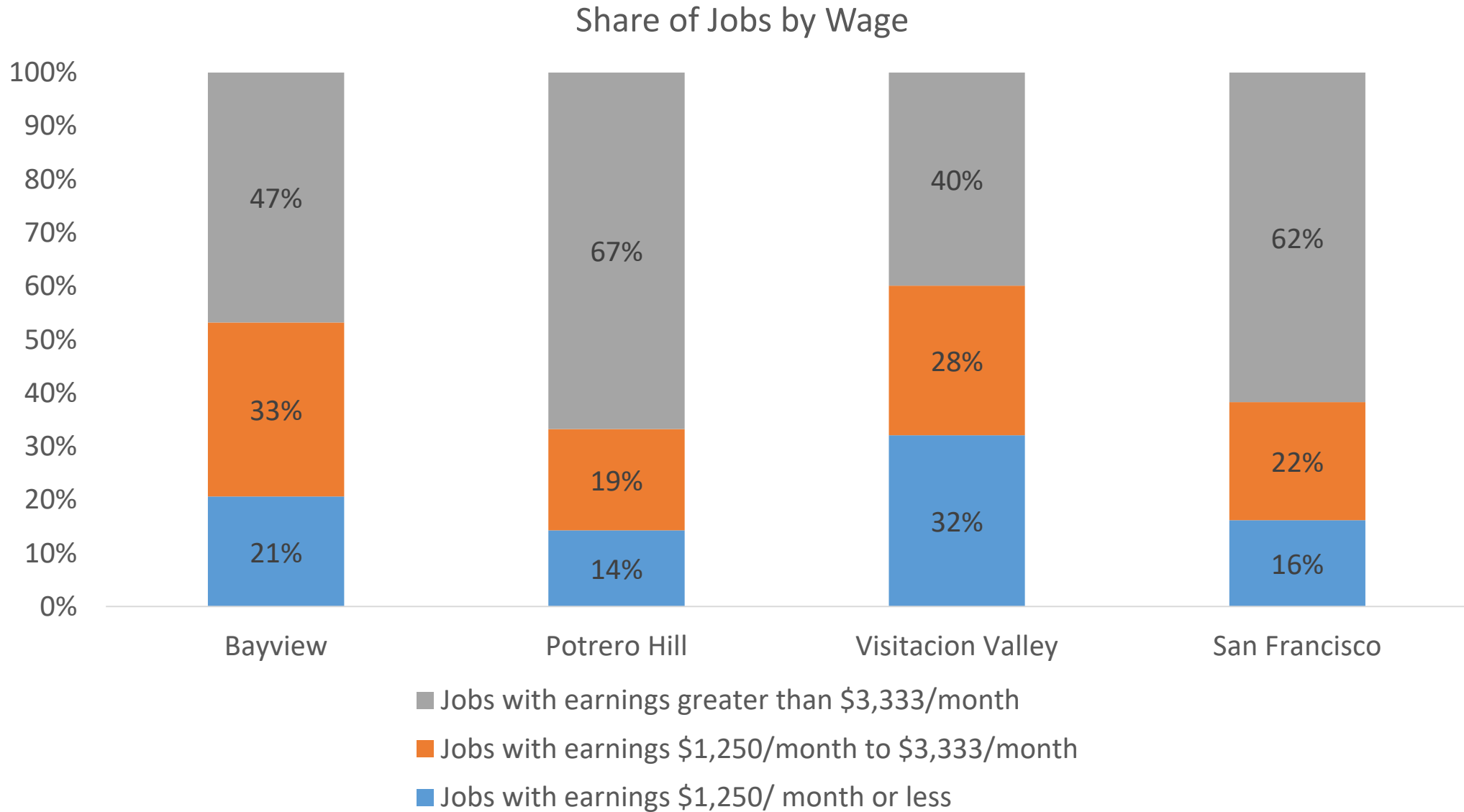
- The most prevalent jobs for residents of HOPE SF census tracts are in Health Care and Food Service.
 - These industries are experiencing rapid growth in HOPE SF neighborhoods
 - Jobs in these industries have relatively low median hourly wages, especially Food Service
 - There has been a decline in Manufacturing jobs
- In HOPE SF neighborhoods, most workers commute into the neighborhood from elsewhere
 - Potrero Hill has the highest rate of in-commuters
- Bayview and Visitacion Valley have fewer high paying jobs and more jobs that are held by workers with a high school degree or less
- Potrero Hill has a higher proportion of professional service jobs, as Potrero Terrace & Annex is surrounded by high-income, high-education neighbors
- African Americans are underrepresented in the Bayview workforce

Median Wages of Jobs by Occupation in San Francisco

Occupational Title	May 2017 Employment Estimates	50th Percentile (Median) Hourly Wage
Office and Administrative Support Occupations	151,820	\$23.67
Business and Financial Operations Occupations	108,740	\$43.60
Food Preparation and Serving-Related Occupations	107,660	\$14.74
Sales and Related Occupations	98,110	\$19.60
Computer and Mathematical Occupations	93,670	\$58.61
Management Occupations	90,630	\$72.66
Transportation and Material Moving Occupations	61,770	\$19.43
Education, Training, and Library Occupations	44,140	\$27.97
Construction and Extraction Occupations	31,880	\$30.11
Arts, Design, Entertainment, Sports, and Media Occupations	29,500	\$34.46
Production Occupations	25,170	\$18.57
Installation, Maintenance, and Repair Occupations	24,740	\$29.09
Healthcare Support Occupations	14,880	\$22.77
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	6,940	\$31.85
Administrative Services Managers	3,760	\$59.19
Property, Real Estate, and Community Association Managers	2,350	\$47.45

MIT's Living Wage Calculator estimates \$19.63/hr as the living wage in San Francisco for one adult with no children. A single parent with one child requires a wage of \$38.93/hr to meet basic needs.

Jobs in HOPE SF Neighborhoods by Earnings, 2015



Employment Indicators: Jobs held by residents of HOPE SF Census Tracts, 2015

	Hunters View	Alice Griffith	Sunnydale	Potrero
1	Healthcare (21%)	Healthcare (17%)	Healthcare (21%)	Professional Service (19%)
2	Food Service (12%)	Food Service (13%)	Food Service (14%)	Healthcare (12%)
3	Waste Mgmt/Remed (9%)	Waste Mgmt/Remed (9%)	Retail (9%)	Food Service (9%)
4	Retail (8%)	Retail (9%)	Waste Mgmt/Remed (7%)	Information (9%)
5	Education (7%)	Education (8%)	Professional Srv (7%)	Education (7%)
6	Transpo/Warehouse (6%)	Transpo/Warehouse (6%)	Transpo/Warehouse (5%)	Retail (7%)
7	Professional Srv (6%)	Professional Srv (6%)	Education (5%)	Waste Mgmt/Remed (7%)

Job Growth and Decline in HOPE SF Neighborhoods, 2002 to 2015

Growing

Health Care			
	2002	2015	Percent change
Bayview	689	1,953	183%
Potrero	1,370	2,826	106%
VisValley	1,115	3,243	191%
SF	45,249	78,238	73%

Food Service			
	2002	2015	Percent change
Bayview	829	2,041	146%
Potrero	2,309	6,280	172%
VisValley	296	404	36%
SF	57,283	82,642	44%

Construction			
	2002	2015	Percent change
Bayview	3,973	4,998	26%
Potrero	2,474	2,786	13%
VisValley	354	370	5%
SF	17,665	18,579	5%

Differing Trends

Retail			
	2002	2015	Percent change
Bayview	1,593	1,316	-17%
Potrero	2,864	3,964	38%
VisValley	552	585	6%
SF	42,671	47,619	12%

Transportation & Warehousing			
	2002	2015	Percent change
Bayview	2,181	2,170	-1%
Potrero	4,893	10,010	105%
VisValley	213	35	-84%
SF	17,506	15,807	-10%

Declining

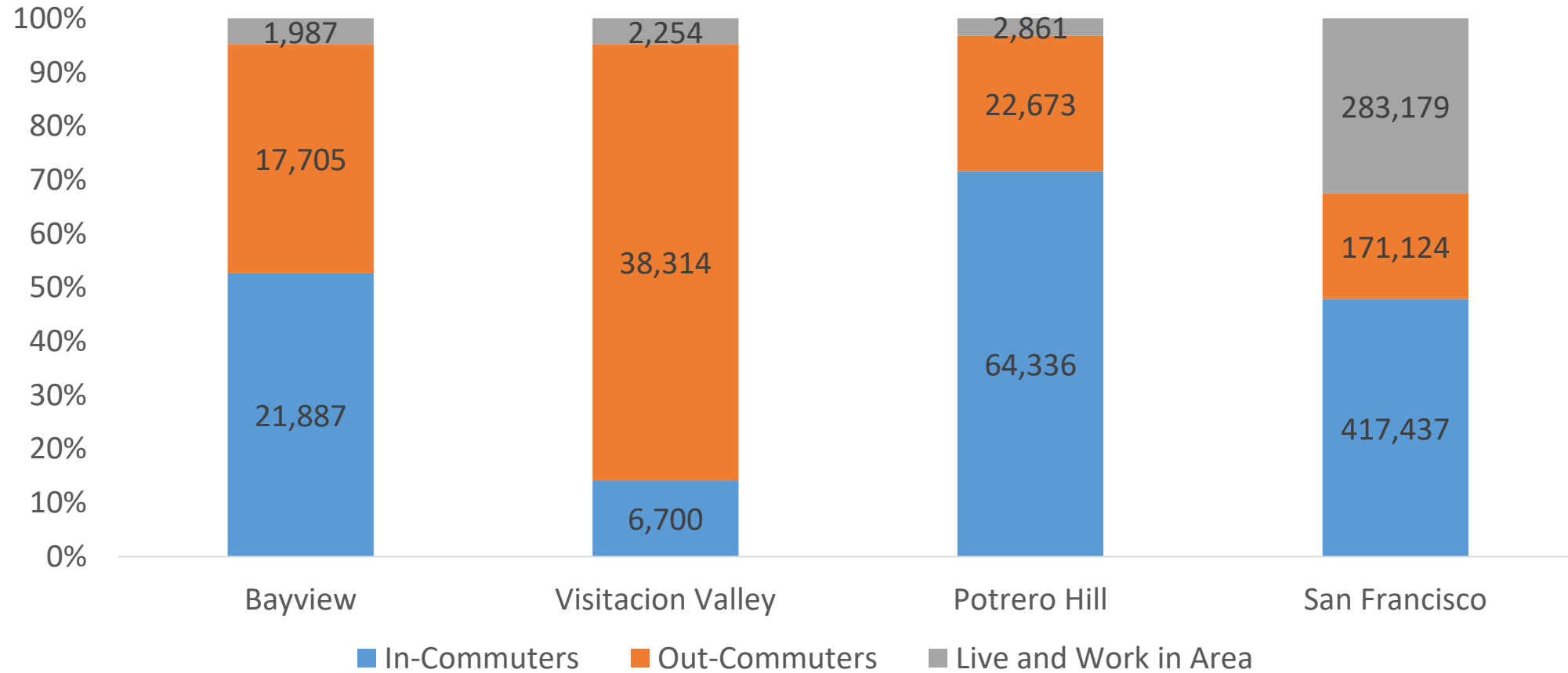
Manufacturing			
	2002	2015	Percent change
Bayview	2,812	1,596	-43%
Potrero	3,357	1,945	-42%
VisValley	156	76	-51%
SF	14,019	9,916	-29%

Economic Activity, 2002-2015

	Jobs in 2002	Jobs in 2015	Net Change 2002-2015	Workers with HS degree or less, 2015	Percent of Jobs for HS or less, 2015
Bayview	33,800	23,874	-29%	8,304	35%
Visitacion Valley	4,359	8,856	103%	3,115	35%
Potrero Hill	31,731	67,197	112%	15,693	23%
San Francisco	517,832	700,616	35%	164,633	23%

Economic Activity, 2015

Worker Inflow and Outflow



Workers in HOPE SF Neighborhoods by Race/Ethnicity, 2015

Bayview (total jobs = 22,823)

Worker Race/Ethnicity	Number Employed	Percent of Employed	Percent of Population	Ratio Jobs : Population
Black	2,750	12%	27%	0.45
Hispanic	5,615	25%	22%	1.13
Asian	4,766	21%	36%	0.58
Pacific Islander	208	0.9%	2.3%	0.40

Visitacion Valley (total jobs = 8,427)

Worker Race/Ethnicity	Number Employed	Percent of Employed	Percent of Population	Ratio Jobs : Population
Black	818	10%	5%	2.01
Hispanic	1,405	17%	29%	0.57
Asian	3,819	45%	51%	0.88
Pacific Islander	61	0.7%	0.8%	0.88

Potrero Hill (total jobs =67,197)

Worker Race/Ethnicity	Number Employed	Percent of Employed	Percent of Population	Ratio Jobs : Population
Black	6,590	10%	5%	2.15
Hispanic	11,467	17%	30%	0.57
Asian	16,955	25%	19%	1.36
Pacific Islander	389	0.6%	0.2%	3.32

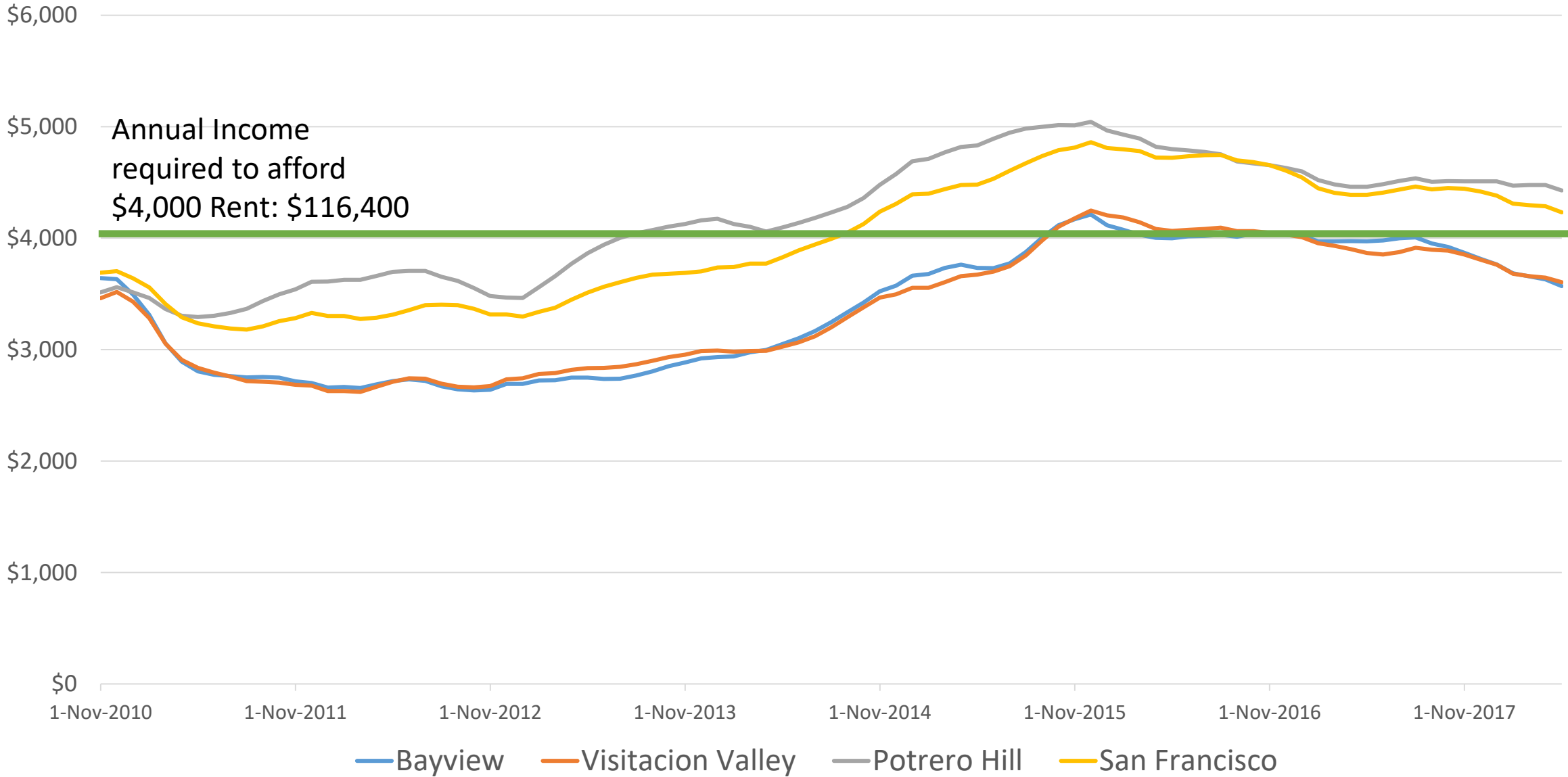
San Francisco (total jobs = 700,616)

Worker Race/Ethnicity	Number Employed	Percent of Employed	Percent of Population	Ratio Jobs : Population
Black	50,767	7%	5%	1.41
Hispanic	110,573	16%	15%	1.03
Asian	180,265	26%	34%	0.77
Pacific Islander	3,342	0.5%	0.3%	1.39

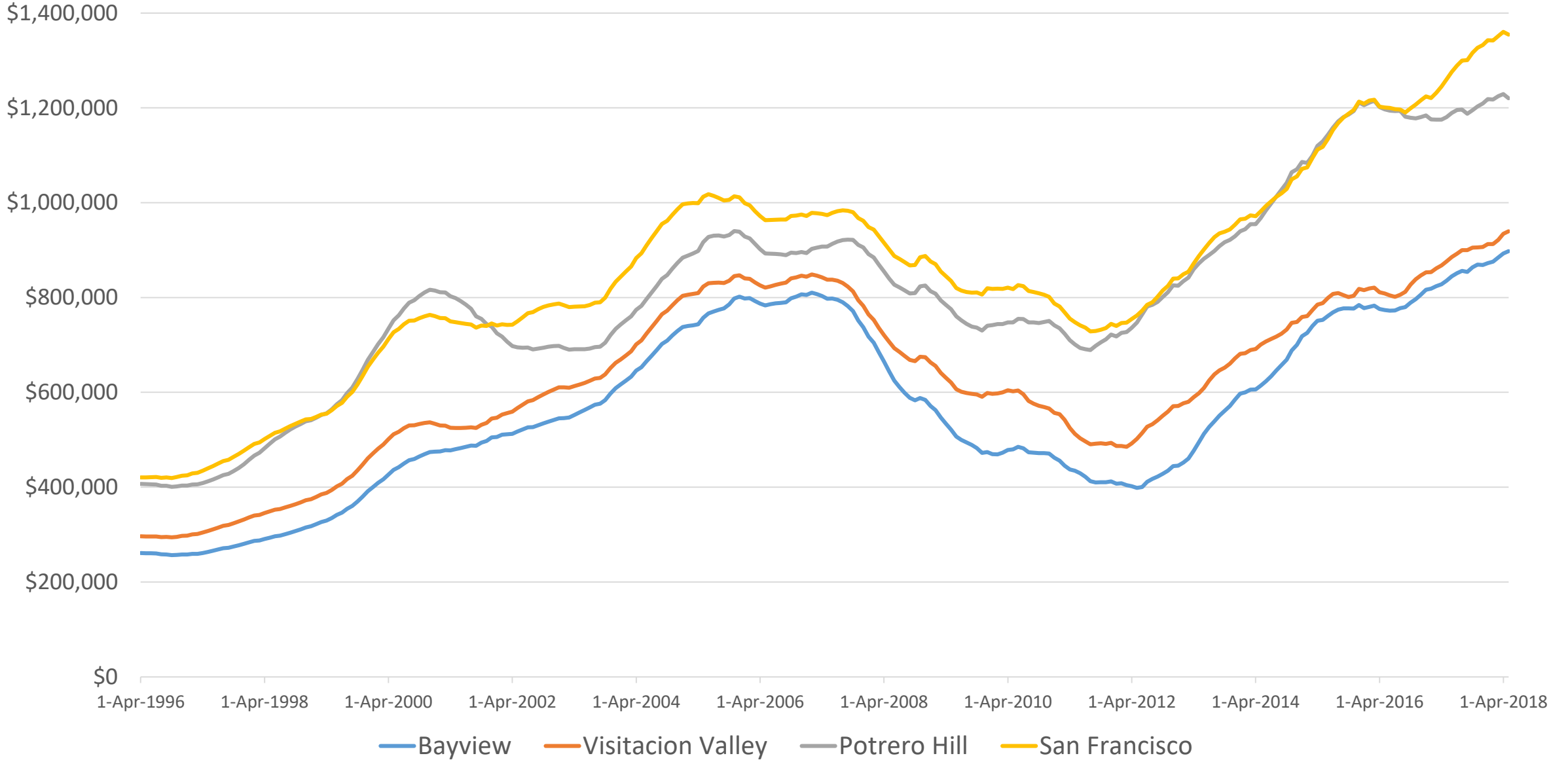
Housing Trends

- Housing prices and rents are less in Bayview and Visitacion Valley than in the rest of San Francisco but are still unaffordable for working class residents
- Proposed developments will dramatically increase neighborhood populations
 - Less than 1/3 of proposed units will be affordable

Median Rent (in 2018 Dollars)



Median Home Value (in 2018 dollars)



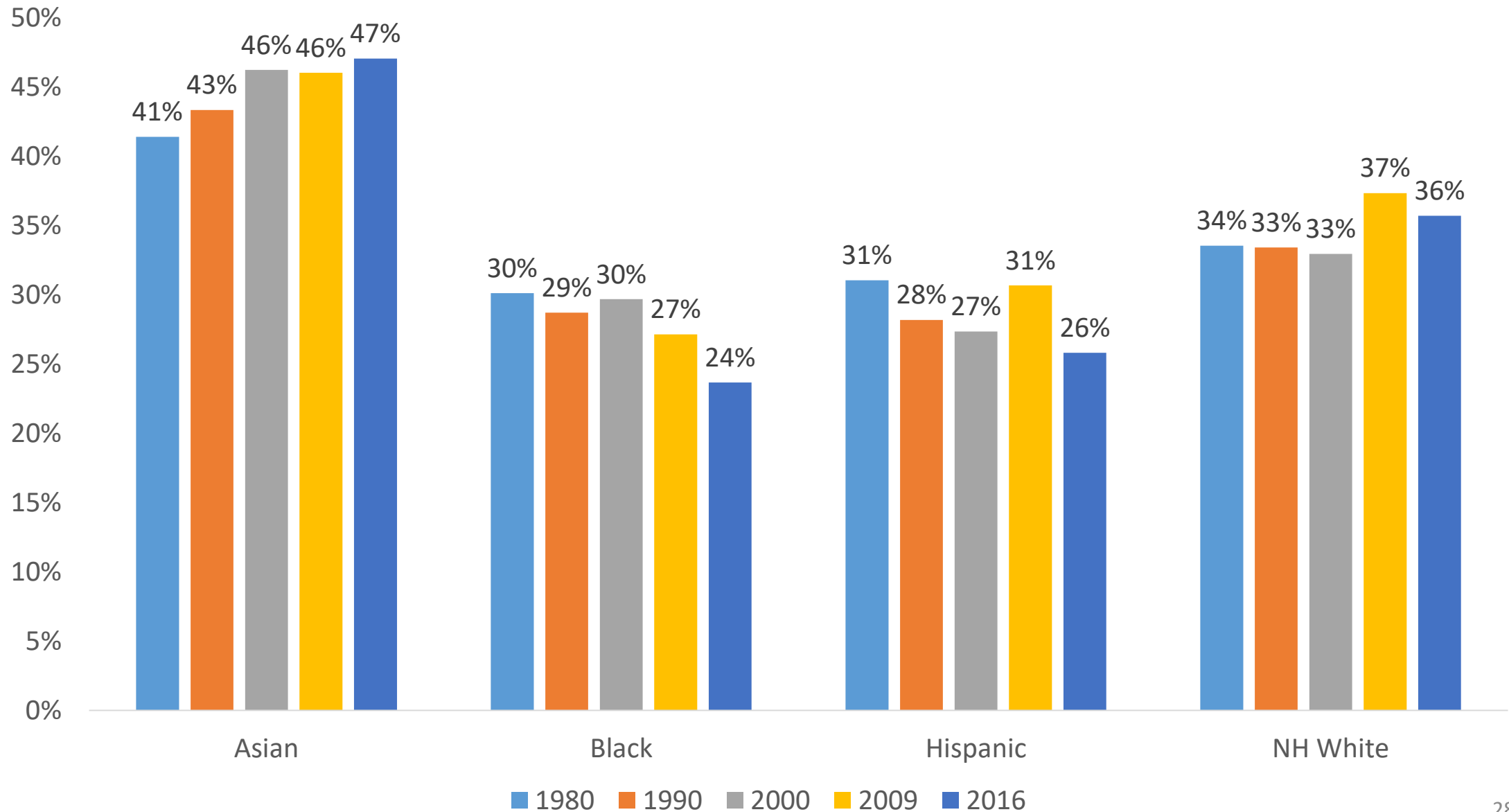
Development Pipeline: Permitted Residential Units, 2018

Neighborhood	Total Units	Affordable Units	Percent Affordable
Bayview	12,773	3,413	27%
Visitacion Valley	1,939	213	11%
Potrero Hill	7,553	1,182	16%
All HOPE SF Neighborhoods	22,265	4,808	22%
San Francisco	67,811	11,447	17%

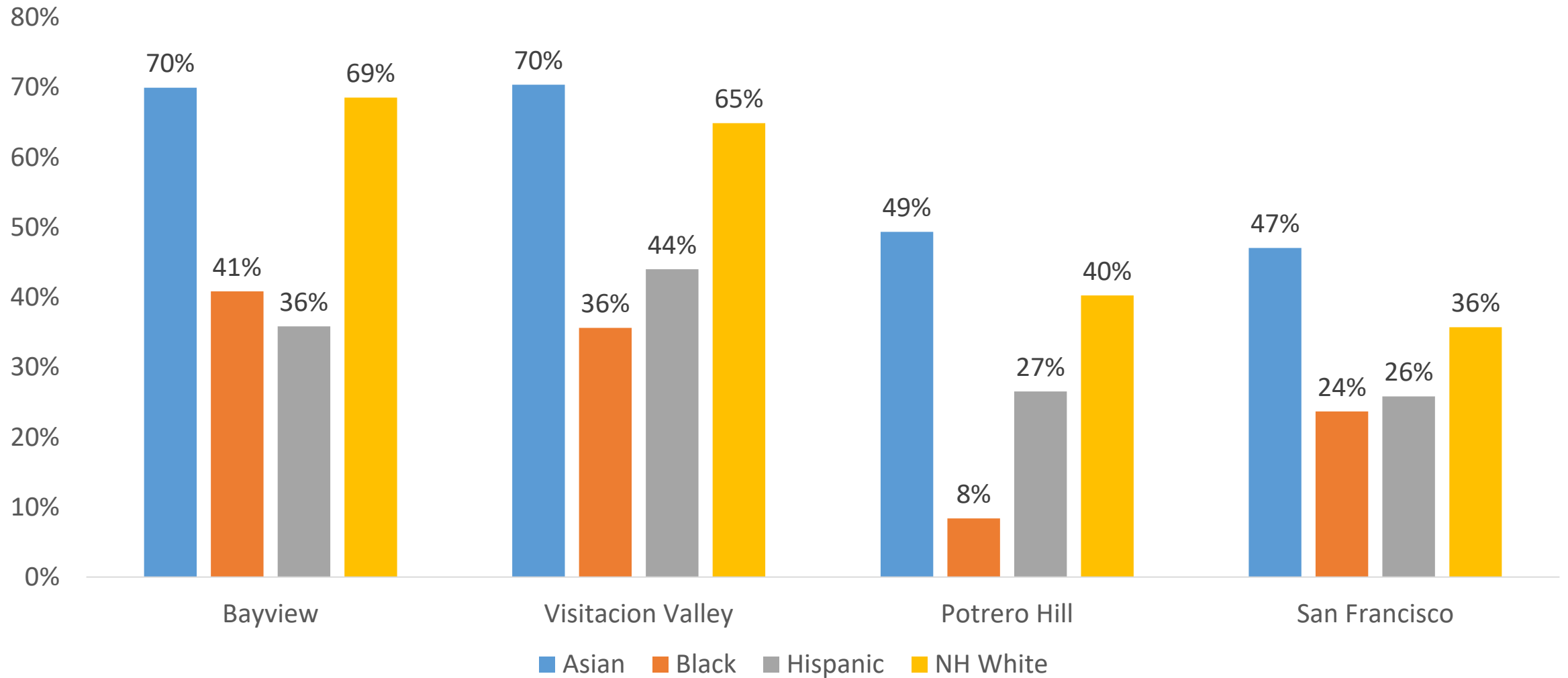
Access to Homeownership

- Homeownership rates are highest for Asian households, followed by White households
 - White and Asian borrowers have received the majority of home mortgages since 2012
 - Despite making up almost a third of the populations of Visitacion Valley and Potrero Hill, Hispanic borrowers received less than 5% of mortgages there
- Homeownership has declined for Black households in each HOPE SF neighborhood, while it has grown slightly for Hispanic households
- Visitacion Valley experienced a substantial decrease in homes owned by non-Hispanic White households in the 1980s and 1990s, with a concomitant increase in Asian homeowners

San Francisco Homeownership Rate by Race/Ethnicity, 1980 to 2016



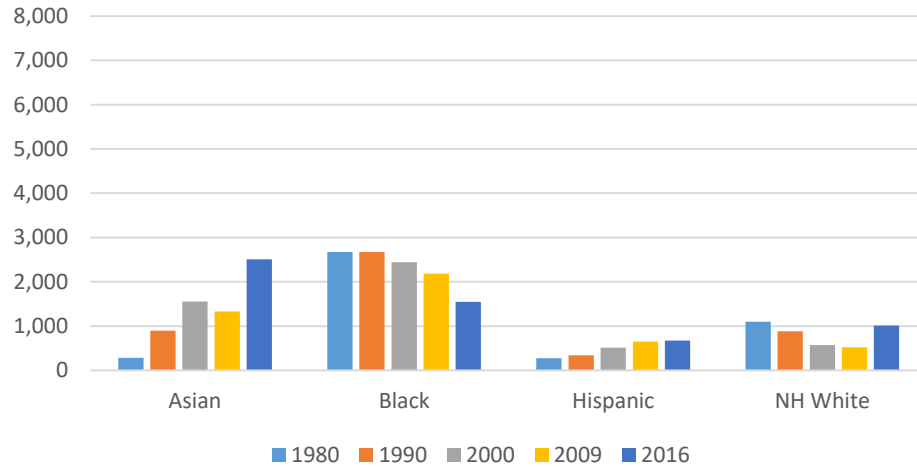
Homeownership Rate by Race, 2016



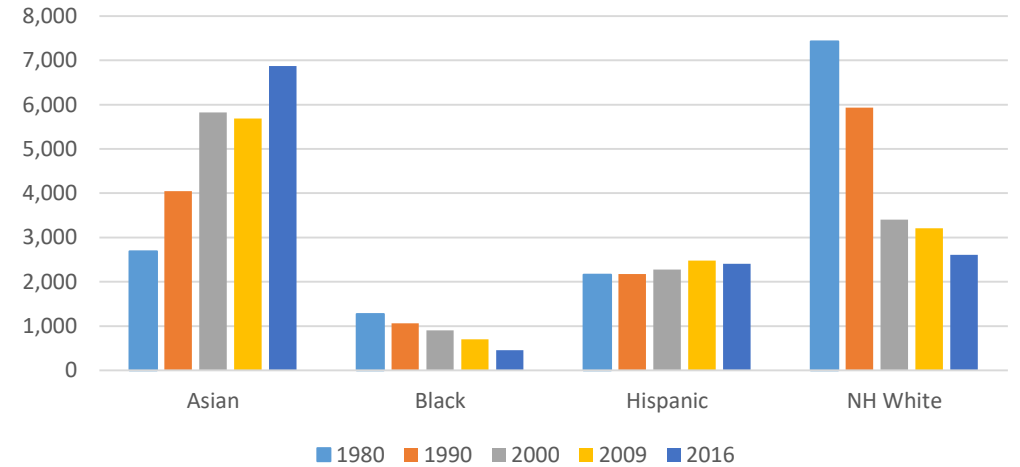
Homeowners by Race, 1980 to 2016

Number of Households Who Own their Home

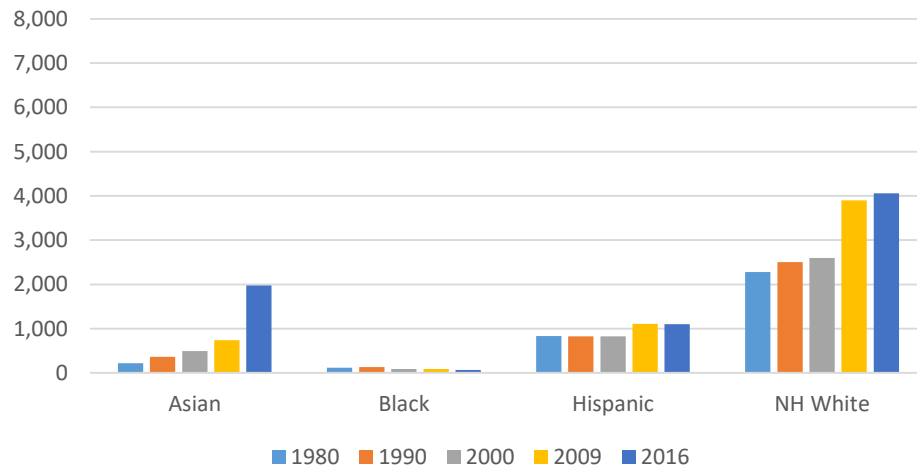
Bayview Households that own their Home



Visitation Valley Households that own their Home



Potrero Households that own their Home



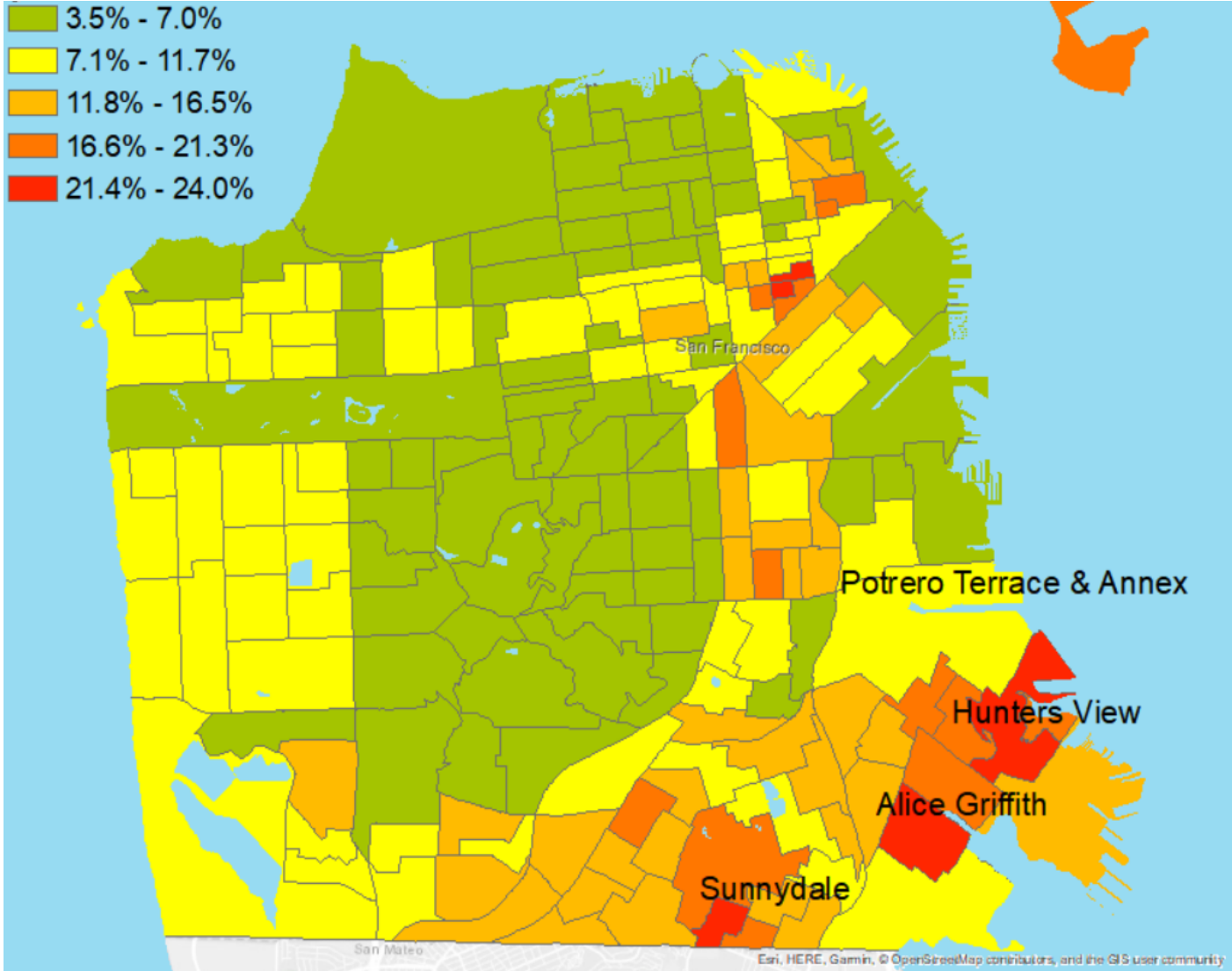
Share of Mortgages by Race, 2012 to 2016

	Bayview			Potrero			Visitacion Valley			San Francisco		
	Mortgages	Share of Mortgages	Share of Population	Mortgages	Share of Mortgages	Share of Population	Mortgages	Share of Mortgages	Share of Population	Mortgages	Share of Mortgages	Share of Population
Asian	543	46%	36%	799	30%	19%	854	60%	51%	8,474	39%	34%
Black	37	3%	27%	24	1%	5%	13	1%	5%	202	1%	5%
Hispanic	60	5%	22%	62	2%	30%	75	5%	29%	698	3%	15%
White	377	32%	8%	1,191	44%	42%	351	25%	11%	12,164	56%	41%

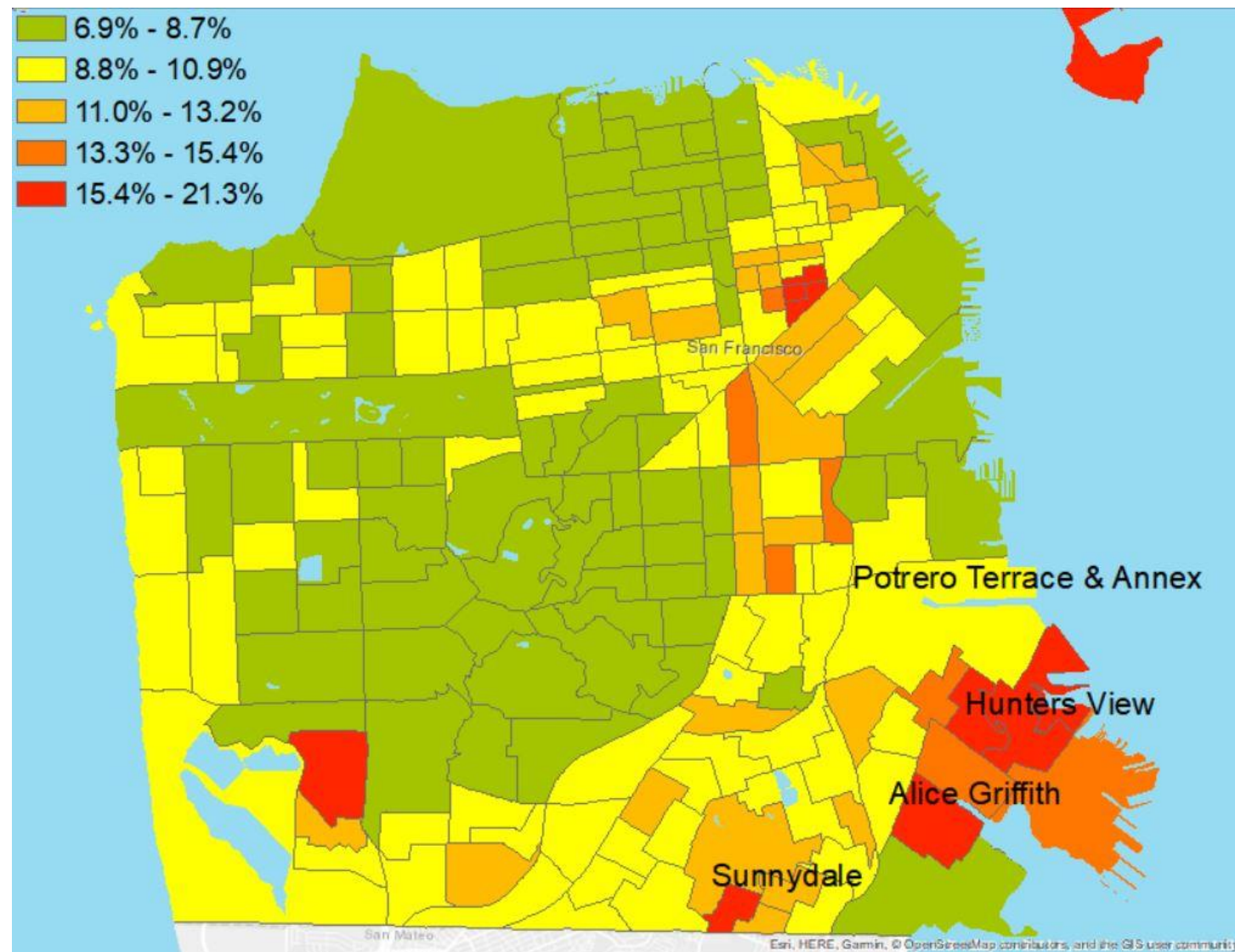
Health

- 1 in 5 residents in HOPE SF Census Tracts lack health insurance
- Residents in HOPE SF neighborhoods suffer from higher rates of acute illness related to the environment such as asthma
- Residents in these areas also experience more frequent mental health issues than the rest of San Francisco

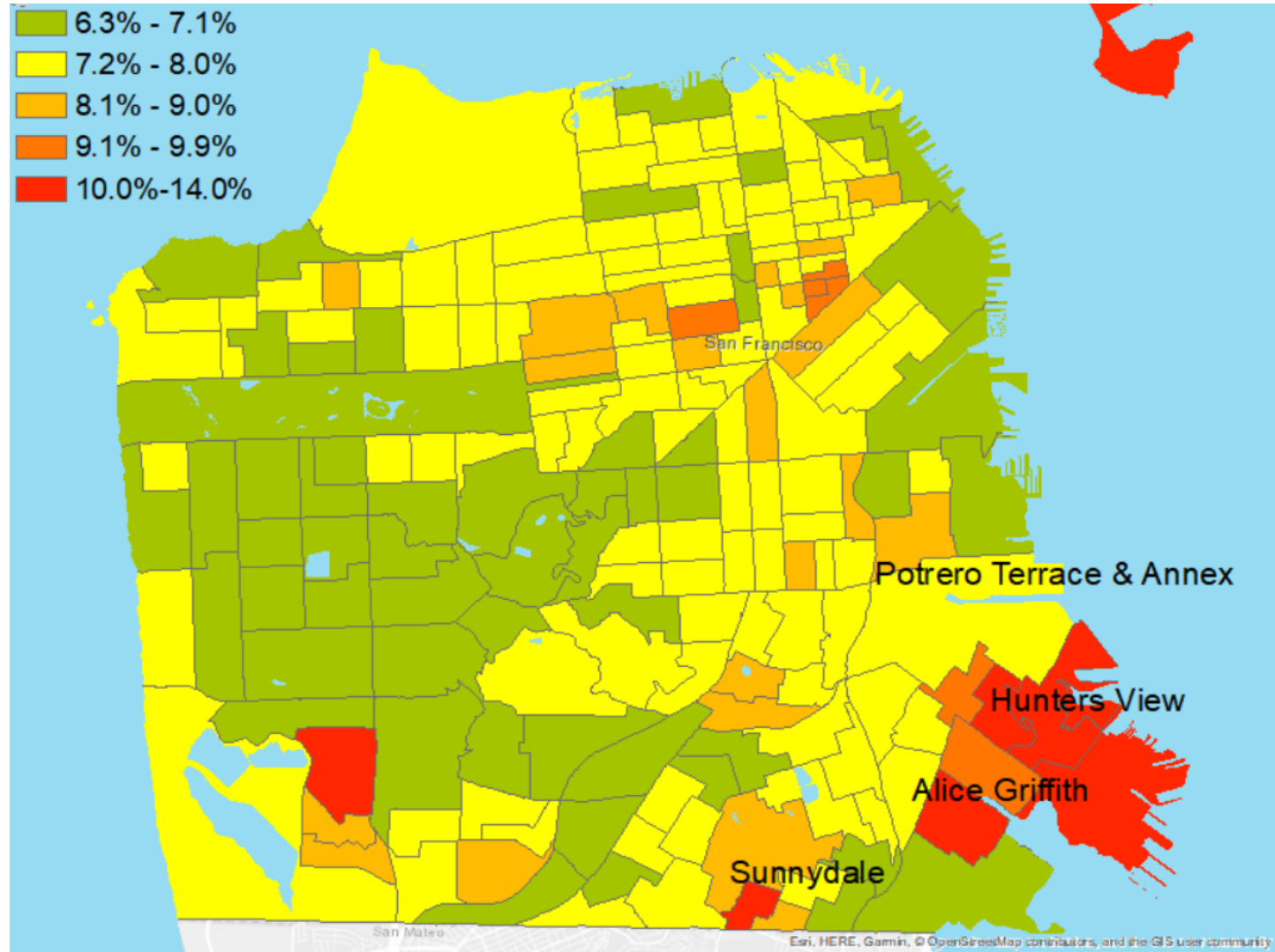
Public Health: Share of Adults without Health Insurance



Share of Adults with Poor Mental Health more than 14 days per year



Share of Adults with Current Asthma



Notes and Sources:

Slide 3 – Map of Neighborhoods: Neighborhoods defined by Census Tracts as follows: Potrero Hill = 177, 226, 227.02, 227.04, 228.01, 228.02, 228.03, 229.01, 229.02, 229.03, 607, 614; Bayview Hunters Point = 230.01, 230.03, 231.02, 232, 233, 234, 610, 612, 9806, 9809; Visitacion Valley = 256, 257.01, 257.02, 258, 259, 260.01, 260.02, 260.03, 260.04, 263.01, 263.02, 263.03, 264.01, 264.02, 264.03, 264.04, 605.02, 9805.01.

Slide 5 – Population Trends: Data from Census 1980 Table T13, Census 1990 SF1 Table P10, Census 2000 SF1 Table P8, ACS 2009 5-year estimates Table B03002, ACS 2016 5-year estimates Table B03002.

Slide 7 – Median Income: Data from ACS 2017 1-year estimates Table S1903

Slide 8 – SF population change by income: Inflation adjusted to 2017 dollars; income brackets were created by creating roughly aligning categories from inflation-adjusted census options e.g. \$5,000-\$9,999. Data from Census 2000 SF3 Table P151, ACS 2011 1-year estimates Tables B19001B-I, ACS 2017 1-year Estimates Tables B19001B-I

Slides 9-11: Households by Income Data from Census 1990 SF3 Table P083/P082, ACS 2016 5-year estimates Tables B19001 B-I

Slide 13 - Education: Data from Census 1980 SF3 Table P59, Census 1990 SF3 Table P58, Census 2000 SF3 Table P148B-I, ACS 2009 5-year estimates Table C15002B-I, ACS 2016 5-year estimates Table C15002B-I.

Slide 14 – Household Composition: Data from Census 1990 Social Explorer Table T16, Census 2000 SF1 Table P19, ACS 2009 5-year estimates Table B11005, ACS 2016 5-year estimates Table B11005.

Slide 16 – Wages: Wages from 2017 Occupational Employment Statistics (OES) survey. Occupations are classified using the Standard Occupational Classification (SOC) codes.

Slide 17 – Employment Indicators: Data from LEHD Origin-Destination Employment Statistics (LODES), Resident Area Characteristics (RAC) 2015. Wages from 2017 Occupational Employment Statistics (OES) survey. Occupations are classified using the Standard Occupational Classification (SOC) codes.

Slide 18 – Employment Indicators: These data represent residents of the one or two census tracts that comprise each HOPE SF development: Hunters View = 230.01, 230.03; Potrero Terrace & Annex = 614; Alice Griffith = 234, Sunnydale = 9805.01, 605.02. These residents do not all reside within HOPE SF communities but all HOPE SF residents reside in these tracts. Data from LEHD Origin-Destination Employment Statistics (LODES), Resident Area Characteristics (RAC) 2015.

Slides 19-22 – Employment Indicators: Data from LEHD Origin-Destination Employment Statistics (LODES), Resident Area Characteristics (RAC) 2015. Wages from 2017 Occupational Employment Statistics (OES) survey. Occupations are classified using the Standard Occupational Classification (SOC) codes.

Slide 24-25 – Rents and Home Values: Universe: all homes. Adjusted for inflation using CPI calculator. Data from Zillow Home Value Index (ZHVI) and Zillow Rental Index (ZRI); seasonally adjusted measure of the median estimated home value across a given region and housing type. www.zillow.com/research/data/ ; Living wage from <http://livingwage.mit.edu/>

Slide 26 – Development Pipeline: Data from sf.gov

Slide 28-30 – Homeownership: Data from Census 1980 Tables T109, T110; Census 1990 SF1 Tables H9, H11; Census 2000 SF3 Tables H11-H13, ACS 2009 5-year estimates Tables B25003B-I, ACS 2016 5-year estimates Tables B25003B-I

Slide 31: Mortgage Data from Home Mortgage Disclosure Act 2012-2016; population data same as Slide 5

Slides 33-35: Data from 500 Cities: Local Data for Better Health survey, Centers for Disease Control and Prevention, 2014