



West Coast Urban District Forum

Reno, Nevada

June 2022



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SHAPING CITIES



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silence your
mobile
phones



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SHAPING CITIES



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IDA LPM professionals can earn credit hours for this session.

Please visit the Resources section on downtown.org/certification to learn more.



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West Coast Urban District Form

1. What happened during Covid to Union Square and Downtown LA?
2. Challenges & Initial Interventions
3. Moving forward – Long range changes and solutions



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StreetSense

How has Covid impacted Union Square and Downtown LA?



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**UNION
SQUARE**
ALLIANCE



Union Square Alliance

Marisa Rodriguez
Executive Director

The Alliance

A 27-Block community surrounding Union Square in the heart of San Francisco.

Union Square is an intrinsic part of San Francisco's global image and a central place in the cultural landscape of the City.

Union Square historically has been the most important shopping area in the region and the most important city center shopping district West of Chicago.



From
Elegance...



...to
Essentials



Union
Square
has it all



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Trip Today!

Union Square is the Heart of San Francisco's Downtown

Downtown as a whole is an irreplaceable contributor to the City's economy

- 75% of the City's GDP
- 40% of the City's jobs
- Higher concentration of employment for people of color

Union Square is critical part of greater downtown's contribution

- 15% of the city's total sales tax revenues
- 37% of sales tax from general retail goods
- 47% of visitors to San Francisco come to Union Square
- 12,000 hotel rooms



Challenges 2020 - 2022

Covid-19



Reduction in
Foottraffic

Elevated Vacancy Rate

Increased Quality of
Life Issues

Thefts and Looting

Trends in Union Square

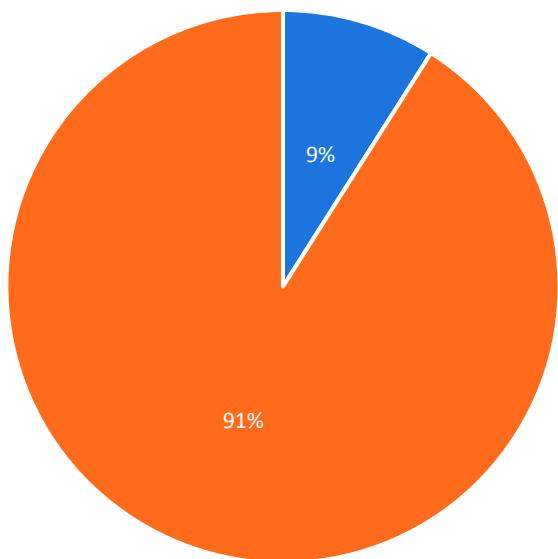
San Francisco



Expected full recovery in 2024

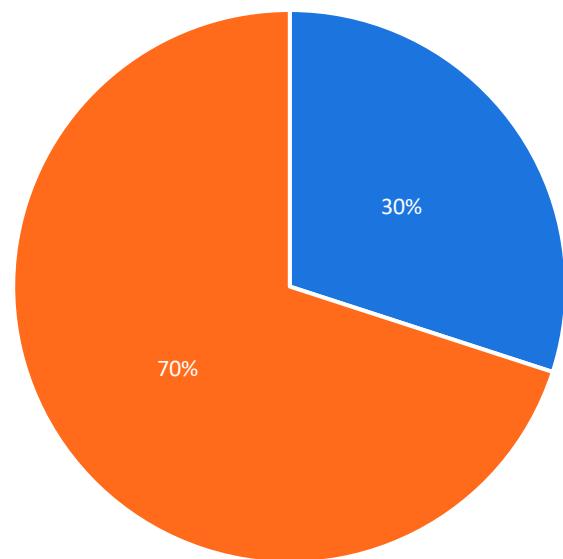
Retail and Restaurant Vacancies

Vacancies Union Square
Pre Pandemic



■ Vacant ■ Occupied

Vacancies Union Square
Post Pandemic



■ Vacant ■ Occupied

Retail trends

Who is looking to be in Union Square?

- Luxury retail is actively expanding and are moving forward strong.
- Businesses focusing on experiences are exploring Union Square.
- Furniture stores are exploring Union Square.
- Middle market brands appear to be struggling.

Store Openings

2020 - 2022

Chanel Expansion	340 Post Street
It'Sugar	2 Stockton Street
Art of the Brick (LEGO)	1 Grant Avenue
IKEA	856 Market Street
YSL Expansion	90 Grant Avenue
Bottega Veneta Expansion	125 Maiden Lane
Coco Republic	55 Stockton Street
Omega	231 Post Street





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Downtown Shopping Districts after Covid—Rich with Opportunity!

Trends



RETAIL



RESIDENTIAL



OFFICE

Trends

- **Retail:** Businesses closed but businesses opened
 - DCBID Tracking:
106 Opened / 102 Closed
 - Consistent with historical city retail business permits for Downtown
 - 2nd generation space became much more appealing



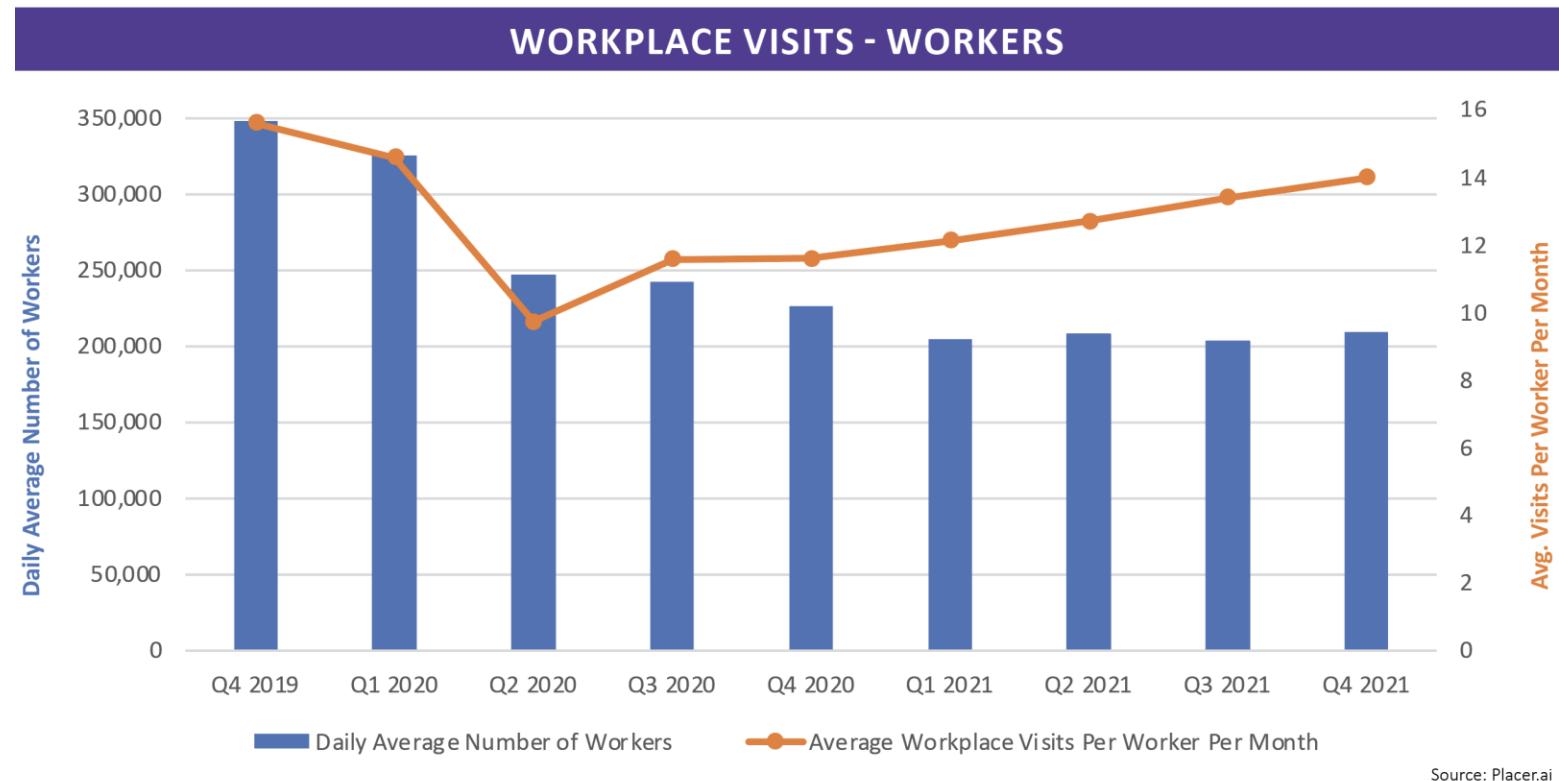
Trends

- **Residential:**
 - 500K daily population dropped to 80K residents
 - Strong residential population kept retail businesses going
 - Community remained strong: 94% record high residential occupancy



Trends

- **Office:**
 - Office workers are slowly returning
 - But once they return, they came back more often
 - Flight to quality



Source: Placer.ai

Navigating the New Economics of Place

SURVIVING AND THRIVING IN 2022 AND BEYOND

streetsense.

street sense.

TRENDS TO TRACK



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go.streetsense.com/pnpnewsletter

1

It's not work from home, It's
work from anywhere, and it's
here to stay.



SOURCE: <https://unsplash.com/photos/slbqShqAhEo>

All indicators continue
to point to hybrid work

49.6

MINUTES IN COMMUTE
TIME SAVED

\$183M

SAVED

890M

FEWER MILES TRAVELED PER
DAY

2.5

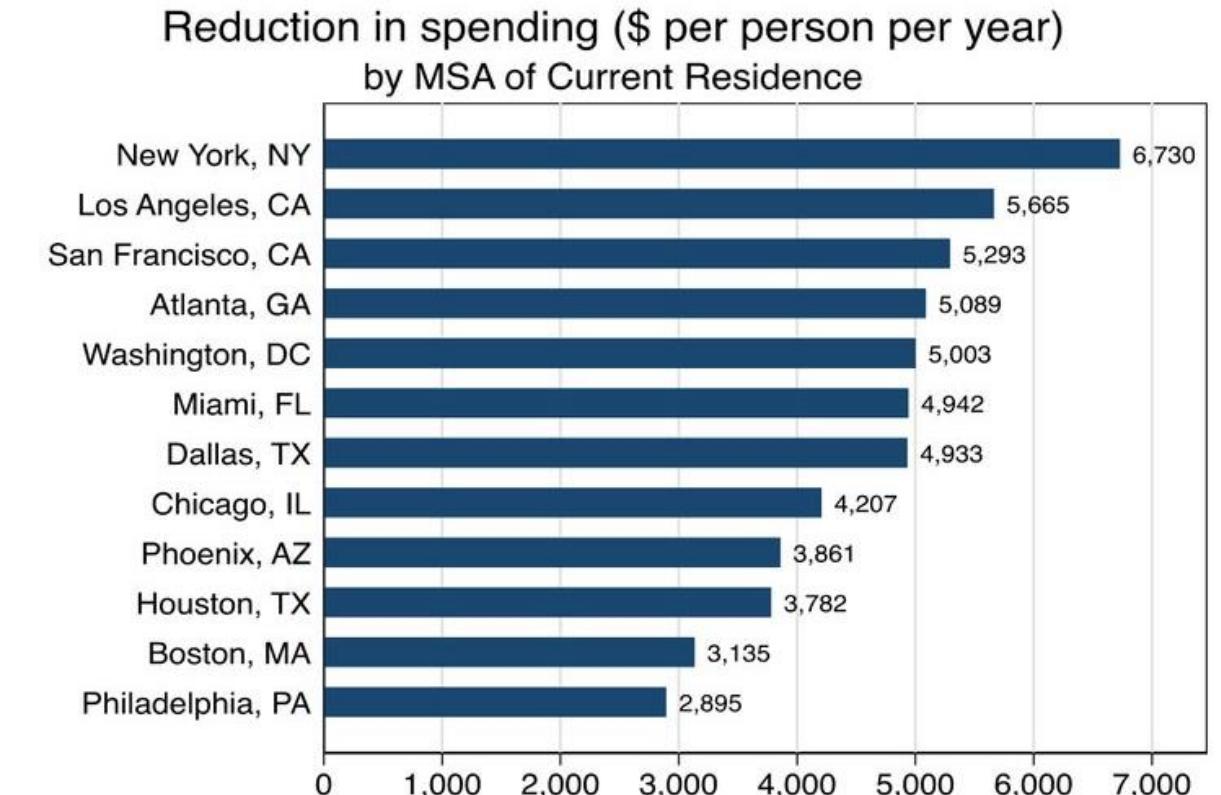
HYBRID DAYS/WEEK

\$11k

REAL ESTATE
SAVINGS

SOURCES : Teleworks Savings Potential, Global Workplace Analytics, 2021.
Dingel, Jonathan. How Many Jobs Can be Done at Home? Becker Friedman Institute. 2020.

The impacts will be felt keenly in CBD environments



Source: SWAA data January to March for working plans (N=7,787) and July 2020 to January 2021 for pre-pandemic spending data (N=14,527). 12 Largest US cities. Only respondees who have WFH at some point during the pandemic. Reduction in spending estimated from proportional reduction in office days (vs baseline of 5% WFH pre-pandemic). Details in www.wfhresearch.com

2

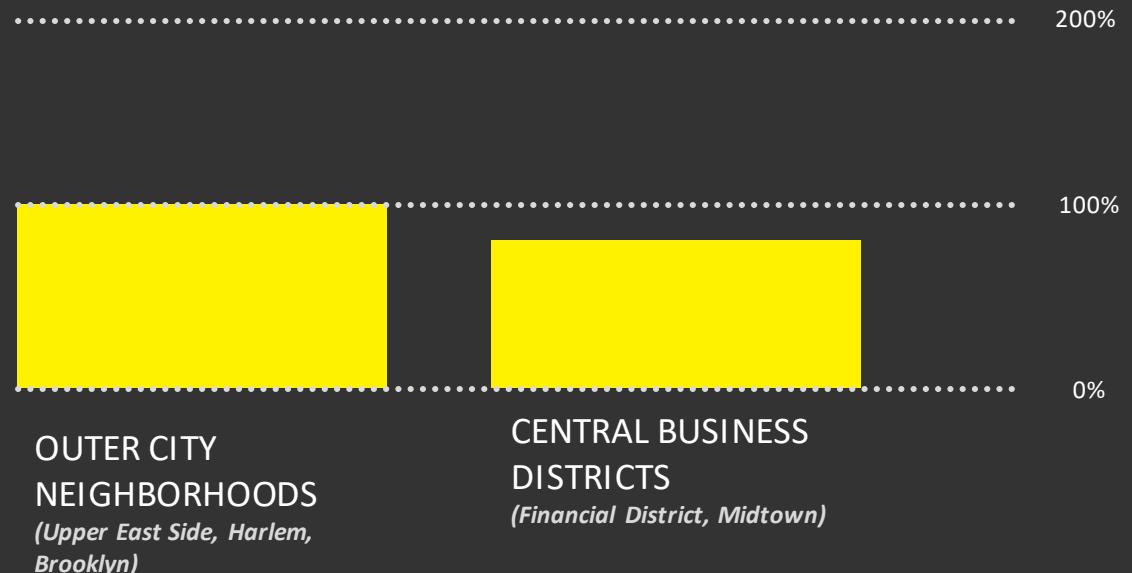
A strong residential base is
crucial to long-term place
resiliency



SOURCE: <https://unsplash.com/photos/eDDQRAYKo7k>

Communities with strong residential remained more resilient

2021 Growth in Sales Compared to 2019 (NYC)



SOURCE:

Recovery Insights: Small Business Reset, Mastercard Economics Institute, 2021.

3

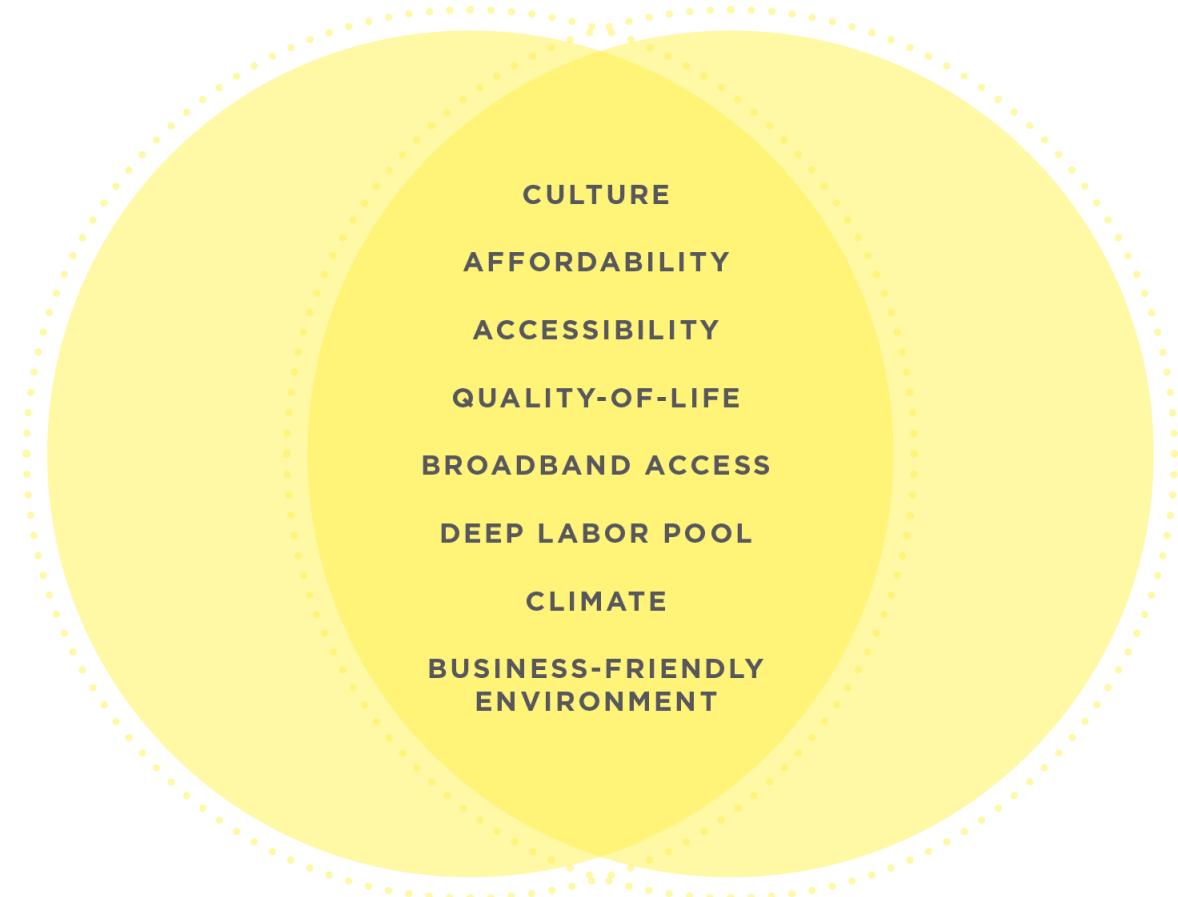
The hierarchy of cities is in flux,
and premier cities stand to
retain global competitiveness



SOURCE:<https://unsplash.com/photos/tf2ETeljezl>

The hierarchy of cities is in flux, and “premier” cities stand to retain global competitiveness

PREMIER STATUS CREDENTIALS



Culture

Facebook recently leased 730,000 square feet of office space on Manhattan's West Side between Pennsylvania Station and the Hudson River.

Why did Facebook choose New York City?

“When considering the next phase of our growth in the city, it was important that our newest office space was situated in the heart of a vibrant community that offered access to arts, culture, media, and commerce”

-John Tenanes
Facebook VP of global facilities and real estate

Accessibility & Business Friendly Environment

90% of One Vanderbilt, a newly constructed 1,401 foot tall, 1.7 million square foot office building located immediately adjacent to Grand Central Station, was leased.



SOURCE: [HTTPS://WWW.HINES.COM/PROPERTIES/ONE-VANDERBILT-NEW-YORK](https://www.hines.com/properties/one-vanderbilt-new-york)

Quality of Life

Younger workers are more likely to live with roommates or in tighter quarters that are less conducive to concentrated work. As a result, they value “places to do focused work”, which does not need to happen in a dedicated office. In fact, after “home” the most popular work locations include co-working spaces and coffee shops.



SOURCE: [HTTPS://UNSPLASH.COM/PHOTOS/FKALRYO4DUI](https://unsplash.com/photos/fkalryo4dui)

Broadband Access

Today, U.S. households own an average of 11 connected devices, including seven with screens to view content

SOURCE: <https://www.hellonerds.ca/blog/best-smart-appliances-for-unique-kitchen-experience/>

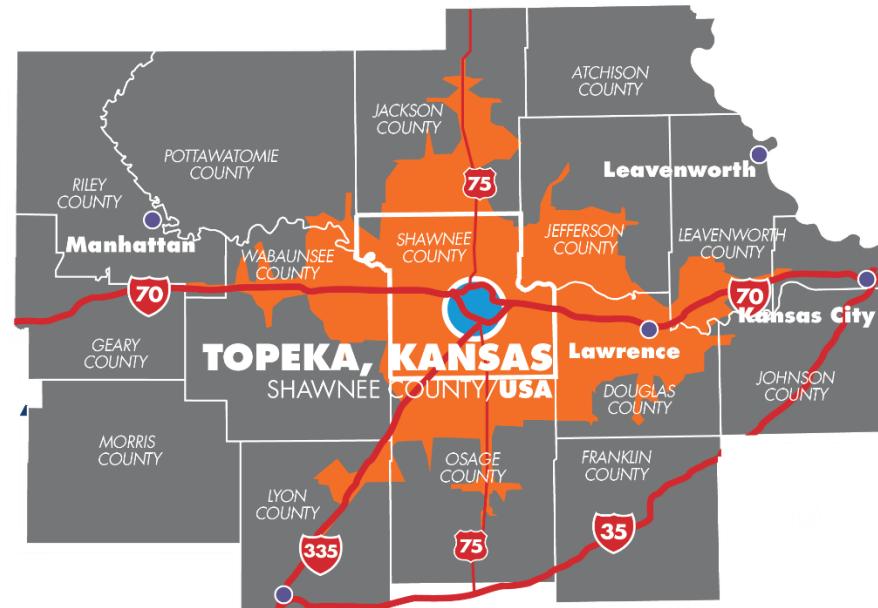
<https://www.scmp.com/native/tech/topics/hyperconnectivity-without-boundaries/article/3141065/how-iot-will-unlock-smart>



Deep Labor Pool

Cities with deep labor pools that draw employees in from their region will thrive in the future.

WORKFORCE DRAW (45-MINUTE DRIVE TIME TO TOPEKA)



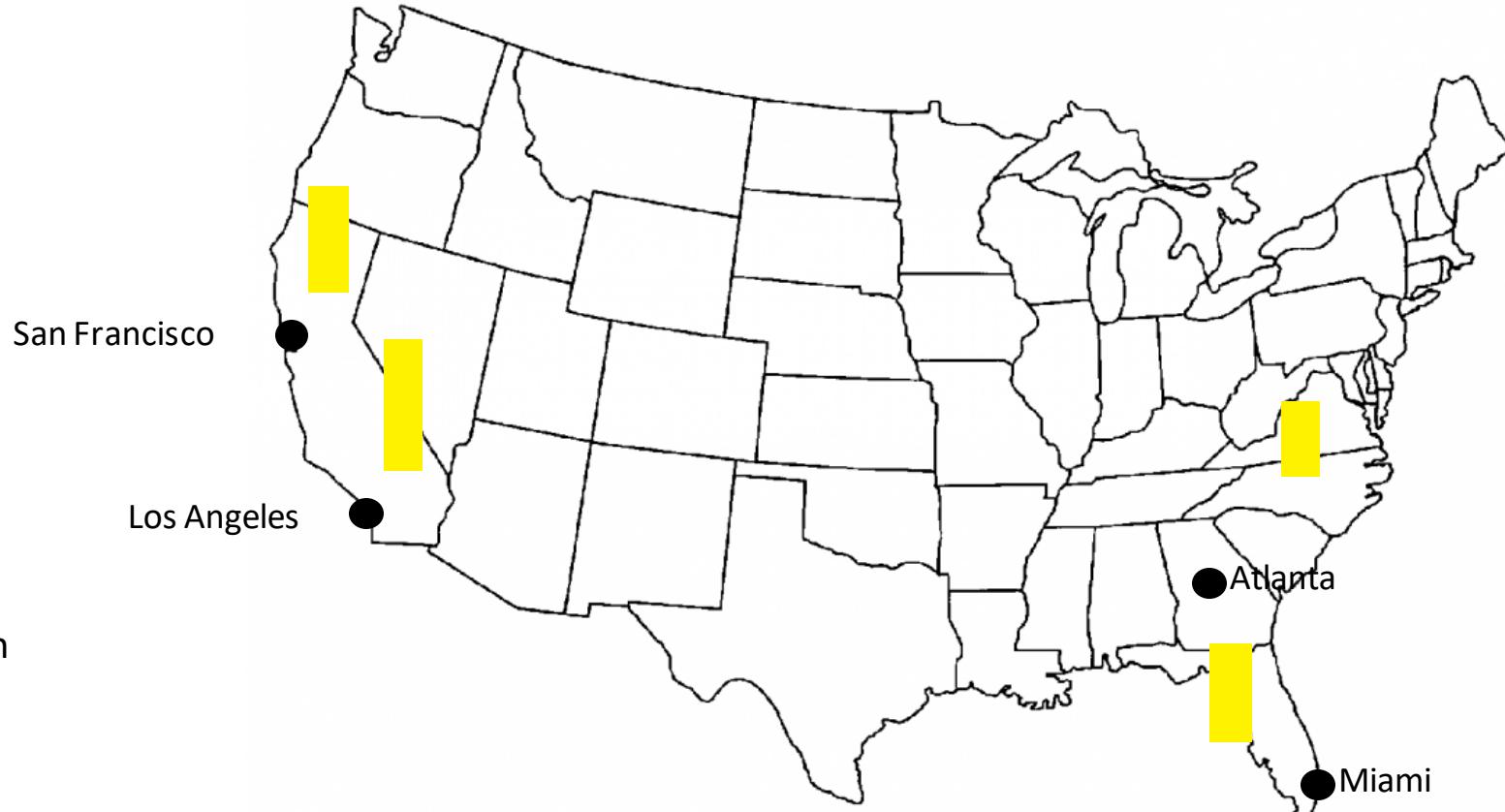
go
topeka

SOURCE: <https://www.gotopeka.com/workforce/>

Climate

Cities and smaller metro areas on the periphery of major metro areas have benefitted from pandemic-related migration patterns.

This is demonstrated by overall **double-digit rent growth in places like Riverside, 2.5 hours outside of LA, and Sacramento about 1.5 hours outside of San Francisco.**



Tampa, FL	+12%
Charlotte, NC	+11%
Riverside, CA	+15%
Sacramento, CA	+14%

SOURCE:

On the Map, The US Census Bureau, 2021.

Alixandrescu, Lucian, NYC Suburbs That Drew Homebuyers During COVID-19, PropertyShark, 2021.

4

Transportation is changing
radically, holding great promise
for urban places – if we embrace
it



SOURCE:
Unsplash: Yoav Aziz

The pandemic gave rise to a much more rapid adoption of alternative mobility options, including micro mobility like e-scooters and e-bikes.



5-10%

BOOST IN THE NUMBER OF PASSENGER KILOMETERS TRAVELED USING MICRO-MOBILITY MODES IN 2030

Q&A



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Challenges and Initial Interventions



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Downtown Shopping Districts after Covid—Rich with Opportunity!

Challenges / Outlook

- Determine what is specifically impacting our market and what we can specifically impact



Challenges / Outlook

- What is specifically impacting our market?
 - Direct outreach to landlords / brokers
 - The Future of Work Symposium
 - **People** - Worker expectations, mental health, culture, work/life support
 - **Places** - Evolution of workplace needs, community, and mobility
 - **Spaces** - Physical as well as virtual spaces & tools



Challenges / Outlook

- What we can specifically impact?
 - Bottom line: employees want hybrid – employers want workers in the office
 - BID can help both by making Downtown where workers want to be
 - Work-Life Balance
 - **Promotion:** what can employees get Downtown that they can't get at home
 - Human Connection
 - **Activation:** Provide opportunities for engagement
 - Public Safety
 - **Improving the Environment:** internal services & government partnership

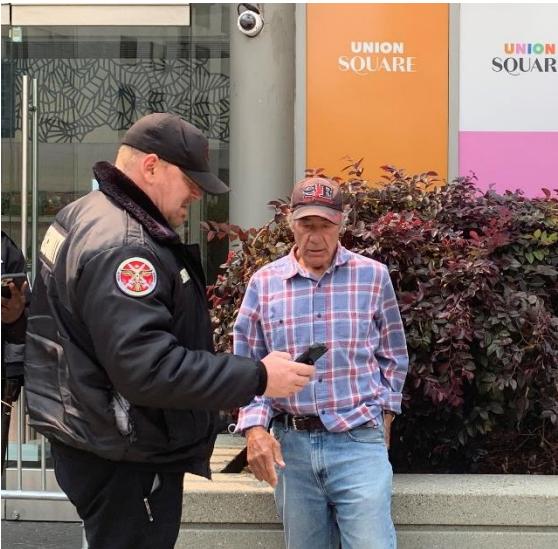
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Union Square Alliance

Marisa Rodriguez
Executive Director

Responding to the Crisis



The Alliance increased Member Services

- 24/7 Clean and Safe throughout the Pandemic
- SFPD 10B officers are on duty for the Alliance 16 hours from 7:00 a.m. – 3:00 p.m. and 3:00 p.m. and 11:00 p.m.
- Our Legion overnight security patrols are on duty from 10:00 p.m. – 6:00 a.m. and 2:00 p.m. – 10:00 p.m. daily



2hr of Free Parking during
Holiday Season 2021

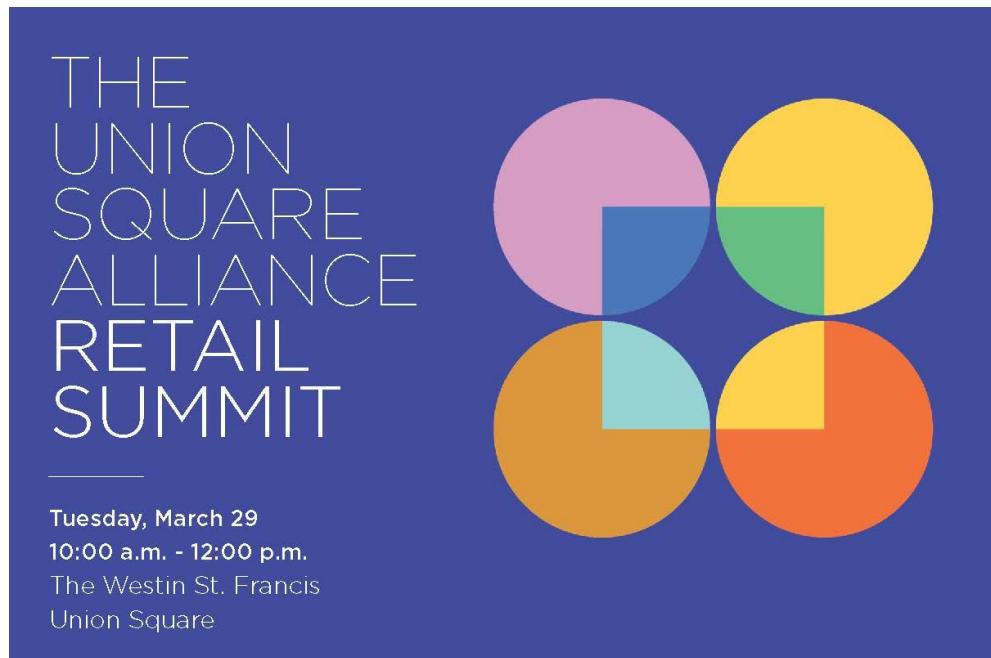


Police Presence and a mobile command van stationed at Union Square Park



Retail Summit

Completed on December 8, 2021, and March 29, 2022



Activations & Events

Valentine's Day



Saturday Music Series



Lighting and Beautification



Cable Car Celebration



Union Square in Bloom



Holiday Activations



Mayor Press Conference at Union Square Park

UNION SQUARE



Q&A



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Moving Forward – Long range changes and solutions



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Strategic Plan 2022



Strategic Plan 2022

Through our strategic plan, we hope to identify areas of focus and direction in order to move Union Square toward a neighborhood is truly multi dimensional.

Focus on increasing
foottraffic

Establishing Relationships
with City Partners

Targeting potential
tenants and work closely
with our Brokers

Clean and Safe

Continue our current level of clean and safe services.

Start focusing on gateways to our district such as garages, the central subway, MUNI, and BART to ensure everyone who comes to Union Square arrives and leaves with a positive feeling of clean and safe.



Marketing and Events

- Further promote Union Square as a destination for all through advertising on local and international websites, printed advertisements distributed to hotels and visitors' centers, and maximizing social media and SEO for a strong online presence.
- Create a consistent calendar of events that activate Union Square every weekend and pull people towards the district.



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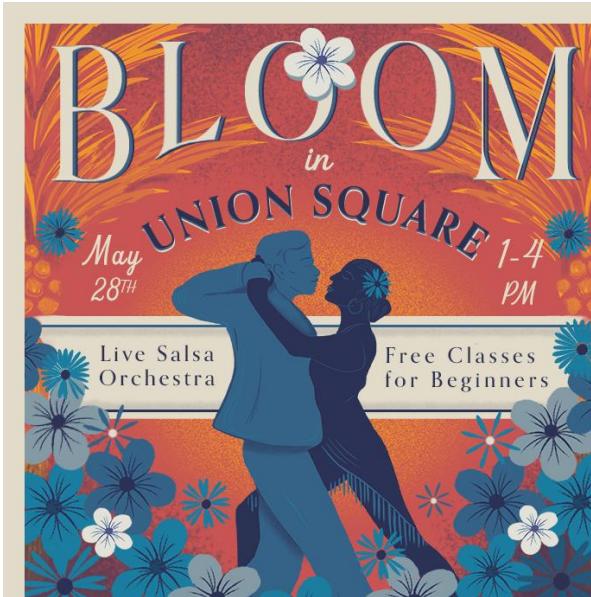
Move Union Square toward a true mixed use urban neighborhood

- Advocate to create flexibility with our zoning and other regulations in order to allow Union Square's offerings to be more resilient and diverse.
- Work with the city, brokers and our community members to attract business to find a home in Union Square.



Public Realm

- Consistently activate Union Square to make it function as the heart of our neighborhood through music, cultural events, food and drink.
- Identify our hidden streetscape gems and amplify them through public art programs and lighting projects.





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DCBID Actions / Solutions



PROMOTION



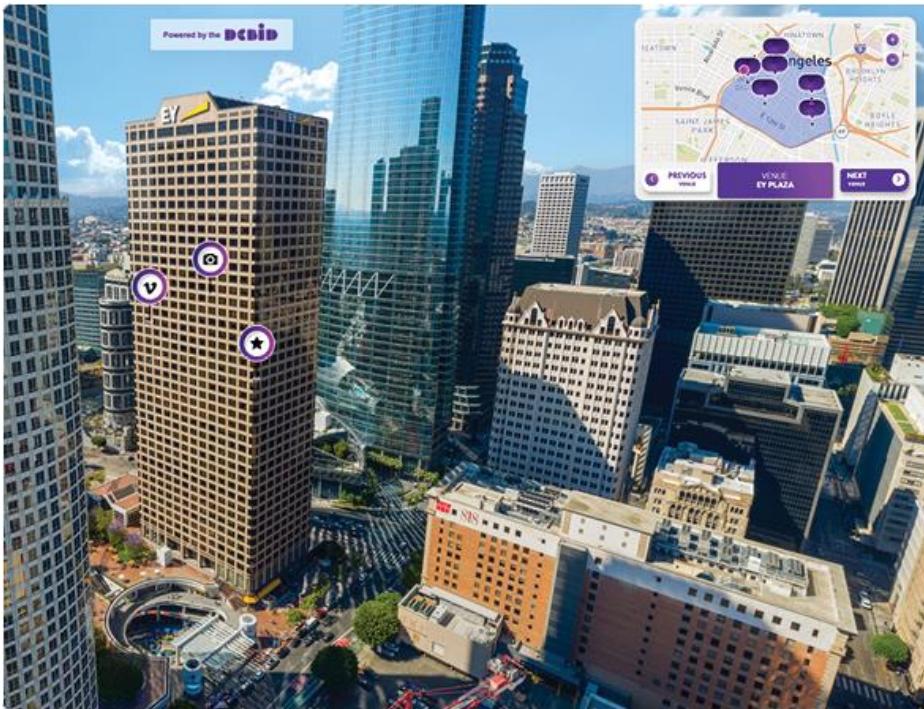
ACTIVATION



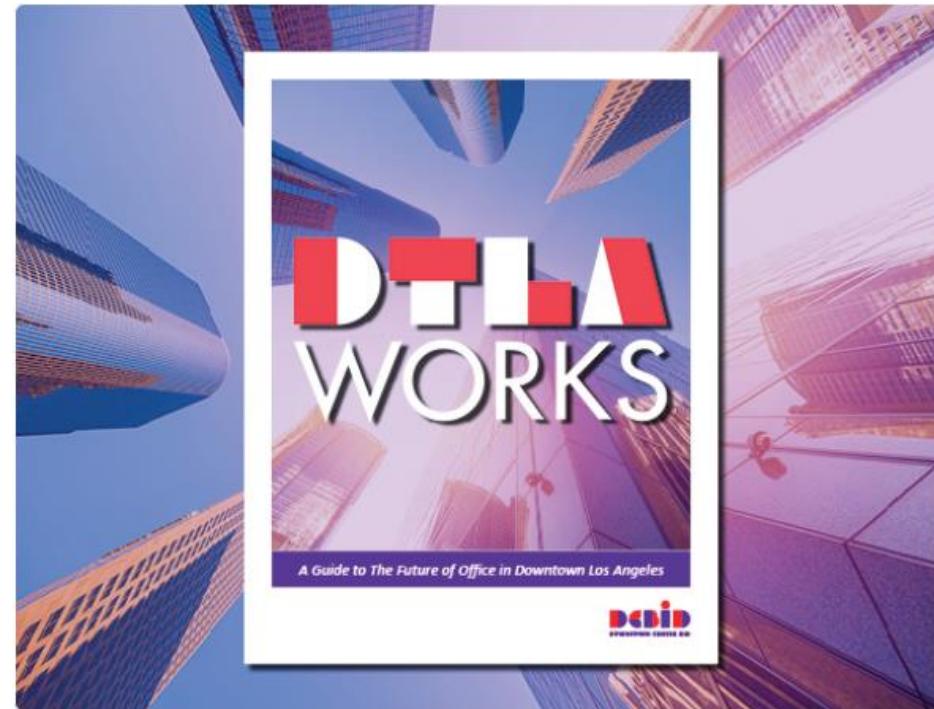
PUBLIC SAFETY

DCBID Actions / Solutions

- **Promotion:** what can employees get Downtown that they can't get at home



DTLA VIRTUAL



OFFICE GUIDE

DCBID Actions / Solutions

- **Activation:** Provide opportunities for engagement



DOWNTOWN SCAVENGER HUNT



RETAIL STORE FRONT ACTIVATION

DCBID Actions / Solutions

- **Improving the Environment:** internal services & government partnership
 - Internal – Clean & Safe:
 - Chrysalis & additional cleaning
 - AUS supported by PATH
 - City / County / State Engagement
 - City Budget
 - Mayoral Race
 - County Mental Health Resources
 - State Legislation



streetsense.

COVID RECOVERY TOOLKIT



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go.streetsense.com/pnpnewsletter

✓ Prioritize the Public Realm

BUSINESS

The New York Times

SQUARE FEET

The Next Frontier in Office Space? The Outdoors

 Gift this article  



“Employers competing for the best workers are using outdoor amenities to show they care about their staff’s well-being.”



SOURCE: <https://www.phillymag.com/be-well-philly/2021/04/16/rothman-roller-rink-dilworth-park/>

The Philadelphia Center City BID developed Dilworth Park and added extra design features that made it Instagrammable.



The Rosslyn BID developed 02 Outdoor Office as a COVID response and made the program permanent.

The future of the city is SMART

- ✓ Diagnose the need for broadband access.

Today's homes have an average of 11 connected devices...

- ✓ Advocate for “Dig Once” policies that require that all providers of broadband services and other utilities install at the same time and share the cost of installation



Creating Communities of Choice

- ✓ Invest in quality-of-life enhancements, including public space investments, parks, and cultural offerings.



SOURCE: Streetsense

The Master Plan for The Collection at Chevy Chase, developed by Streetsense, included significant entertainment and outdoor gathering places

Re-evaluate zoning regulations

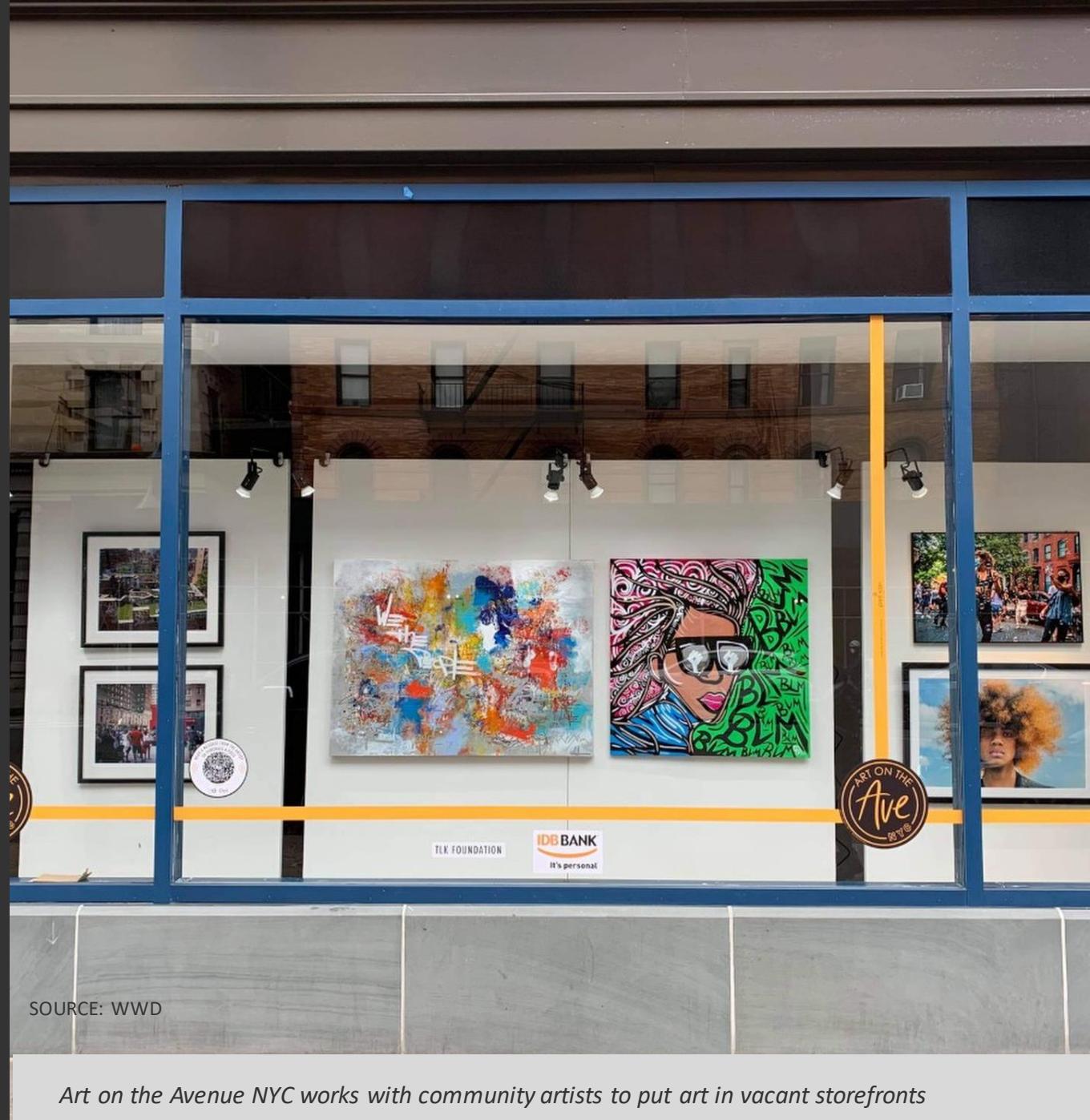
- ✓ ...that prevent portions of retail spaces space from being used for last mile/fulfillment/micro-warehousing.
- ✓ ...that prevent office to residential conversation
- ✓ ...that might require retail w/o the demand to support it
- ✓



SOURCE: Streetsense

Camouflage works wonders

- ✓ Work with local property owners to develop short-term activation programs for vacant space.



Art on the Avenue NYC works with community artists to put art in vacant storefronts

Embrace mobility infrastructure

- ✓ Invest in improved physical infrastructure, bike networks, and secure places for bike parking
- ✓ Improve regulatory frameworks, including the categorization of increasingly faster e-mobility and consider new rules of the road



SOURCE: [HTTPS://UNSPLASH.COM/PHOTOS/FCLKWDLP2RY](https://unsplash.com/photos/fclkwdlp2ry)

Work with private sector partners to support mobility

- ✓ Work with the private sector to develop incentive programs to subsidize bike and/or e-bike purchases.
- ✓ Encourage or require developers to set aside more space for storage, bike repair, and charging locations for e-mobility.
- ✓ Support development of sites adjacent to bike lanes and infrastructure.



Google has partnered with Unagi on the “Ride Scoot” program, reimbursement for a monthly subscription

Spring Bank Equitable Commute Project, in partnership with NYU the Hope Program, Electric Avenue, and Transportation Alternatives distributed 5,000 e-bikes to essential workers in the city’s transportation deserts.

Thank You

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