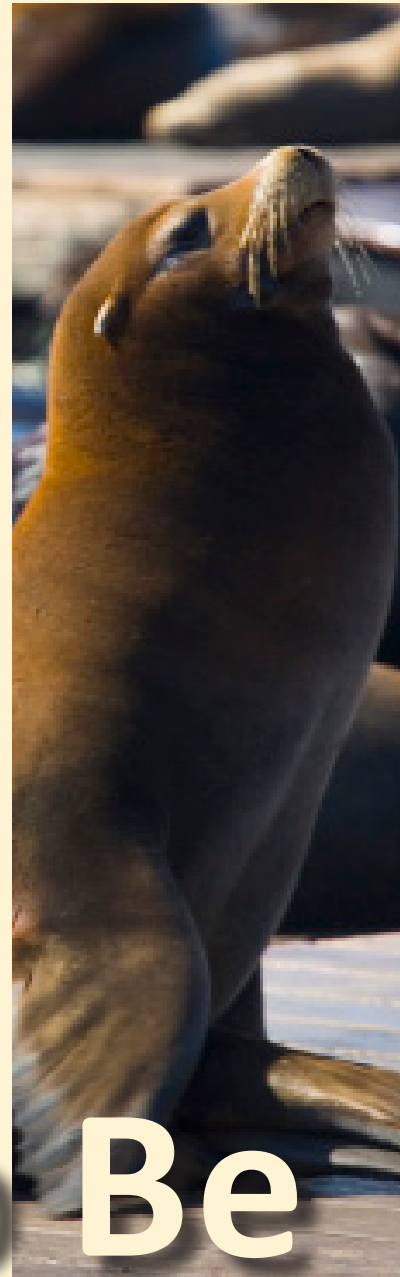
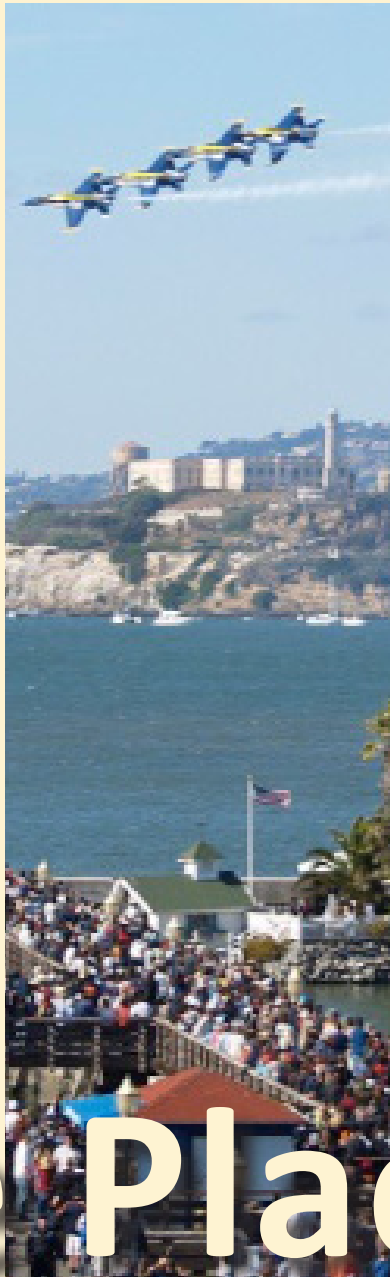




The Place to Be

Fisherman's Wharf
COMMUNITY BENEFIT DISTRICT



Welcome to Fisherman's Wharf

One of the most eclectic neighborhoods in all of San Francisco, Fisherman's Wharf is a commercial, civic, cultural and historic district that is visited by over 12 million people annually. At the north end of the city, its proximity to Alcatraz Island, Fort Mason, the Golden Gate Bridge, Coit Tower and other top attractions make it a must-see for all those visiting San Francisco. Starting in 2012, many infrastructure and capital improvements are being made to the district in order to make a better pedestrian and shopping environment for visitors. Please take a look at the information about this world renowned neighborhood to see if it is the right fit for you!

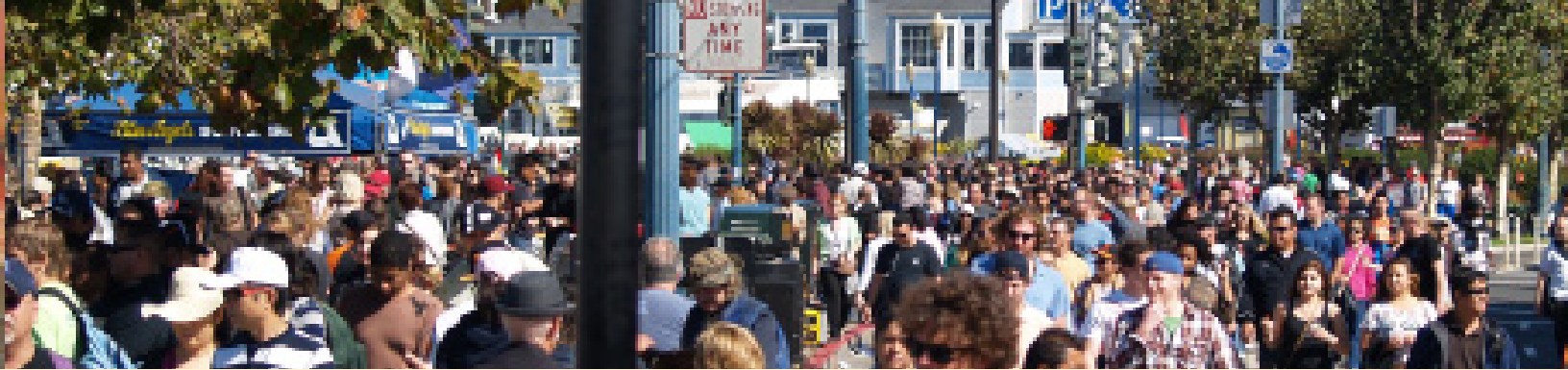
- Fisherman's Wharf is the number one destination in San Francisco and PIER 39 is the most visited attraction
- As a destination, over 12 million people visit Fisherman's Wharf annually
- 35% of visitors to Fisherman's Wharf are local and Bay Area residents
- In 2010, businesses on Fisherman's Wharf, 500 of which are within the boundaries of the FWCBD, generated \$55 million in revenue annually to the City of San Francisco through rents to the Port of San Francisco, payroll, annual sales and property, hotel and parking taxes.
- There are over 6,000 off street parking spaces in 11 garages/lots at Fisherman's Wharf that generate \$14.2 million annually in parking tax revenue
- Fisherman's Wharf supports over 7,400 jobs, 1,475 of those jobs are with the 13 hotels located at Fisherman's Wharf. These 13 hotels have over 3,200 guest rooms and as a district have the highest occupancy rate and average daily rate in the city.

Major Civic, Public and Private Events at Fisherman's Wharf bring in millions of visitors every year:

- America's Cup (Loius Vuitton in July 2013, America's Cup Challenger Series October 2013)
- Fleet Week
- 4th of July Civic Celebration and Fireworks
- Italian Heritage Parade
- Fisherman's Wharf Crab Fest
- Sunday Streets
- Ghirardelli Chocolate Festival
- UnCorked Wine Festival
- San Francisco Marathon
- San Francisco Giants Race
- Men's Health Urbanathlon
- Tulip Mania
- Tree lighting events and PIER 39 & Ghirardelli Square

Major Attractions in the District:

- Cable Cars
- PIER 39
- Ghirardelli Square
- Historic Hyde Street Pier
- Museum Mechanique
- Ripley's Believe it or Not!
- San Francisco Maritime Museum
- The Aquarium of the Bay
- The Blue & Gold Fleet
- The California Sea Lions
- The Jeremiah O'Brien
- The Red & White Fleet
- The USS Pampanito
- Views of the Bay, Alcatraz and Golden Gate Bridge
- Sport Fishing



Fisherman's Wharf Visitor & Local Resident Profile Summary

Wharf Statistics

Annual visitors	12 million
Employees:	7,400
Hotel Rooms:	3,260
Parking Spaces:	6,000

Method of Arrival at the Wharf (Top 5)

Private car	21.5%
Cable Car	20.2%
Walk	20.0%
Bus	9.6 %
Streetcar	8.1%

Top Attractions Visited

PIER 39	65.7%
Sea lions	35.4%
Alcatraz	31.3%
Ghirardelli Square	31.0%
Bay Cruise	18.4%

Spending at the Wharf (per person)

Mean Daily Spending	\$127.70
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Most liked About Wharf

Views	21.5%
Food – dining	17.9%
Ambiance – atmosphere	17.7%
People - People watching	12.0%

Most Disliked About Wharf

There is nothing I dislike	26.0%
Crowded	20.4%
Odors – cleanliness	12.7%
Prices / Expensive	10.8%

Travel Party Characteristics

People in party (avg.)	3.6
Children in party	35.6%
Staying in S.F. hotel	62.7%

Demographics

Gender (male)	53%
Gender (female)	47%

Employed full-time	61.8%
Part-time employment	12.8%
Self-employed	10.4%

Average Household Income	\$91,503
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Place of Residence

San Francisco	8.2%
San Francisco Bay Area	8.7%
Other California	18.6
Other USA	27.5%
Foreign residence	37.1%

Previous visits to Fisherman's Wharf

One visit	17.7%
Two to five	45.9%
Six to nine	7.1%
Ten or more	29.3%

Length of Stay at Fisherman's Wharf

More than 8 hours	1.2%
6-8 hours	27.7%
4-6 hours	15.6%
3-4 hours	14.9%
1-3 hours	34.4%

Likelihood of Returning to Fisherman's Wharf

Very Likely	60.3%
Likely	27.2%
Neither	6.1%
Unlikely	3.5%
Unlikely / Don't Know	3%

Residents Within 2 Mile Walk

From the Wharf	80,000
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The benefits of operating a business in the FWCBD - A great place to work!

The Fisherman's Wharf Community Benefit Landside District was founded in November of 2005 by the business and property owners of this San Francisco neighborhood. Shortly after that in 2006, the Portside District was formed. Both districts are managed by the FWCBD and are funded through an annual assessment from the property owners.

The FWCBD has developed marketing, security, urban planning, signage and emergency preparedness programs. The Community Benefit District has also served as a catalyst for unification of Fisherman's Wharf constituents to support a positive change to their San Francisco neighborhood.

VISITFISHERMANSWHARF.COM

- All businesses within the boundaries of the Fishermans' Wharf Community Benefit District get a free listing on the website (visitfishermanswharf.com)
- The website receives over 120,000 unique visitors annually
- The district is further promoted by the FWCBD's management of the social media pages including Facebook, Twitter, YouTube and Flickr.

MARKETING

- Web banner and tile advertisements on SF Travel's website.
- Advertisements in Chaperon City Guides including the Italian, Japanese, Chinese, Spanish, German, and French editions
- Back Page inside cover ad in San Francisco's Travel Planning Guide
- Production of 250,000 Fisherman's Wharf brochures annually that are distributed to over 20 visitor centers and airports in California.

STREET MAINTENANCE

- Regular Sidewalk Steam Cleaning is performed by the CBD in the Fall and the Spring.
- With our aggressive and ongoing Graffiti Abatement program, graffiti is cleaned up within 48 hours when done on private property.
- In addition to city and Port of San Francisco Workers, the FWCBD provides litter collection and cleaning services seven days a week and 12 hours per day from May to October.

SECURITY

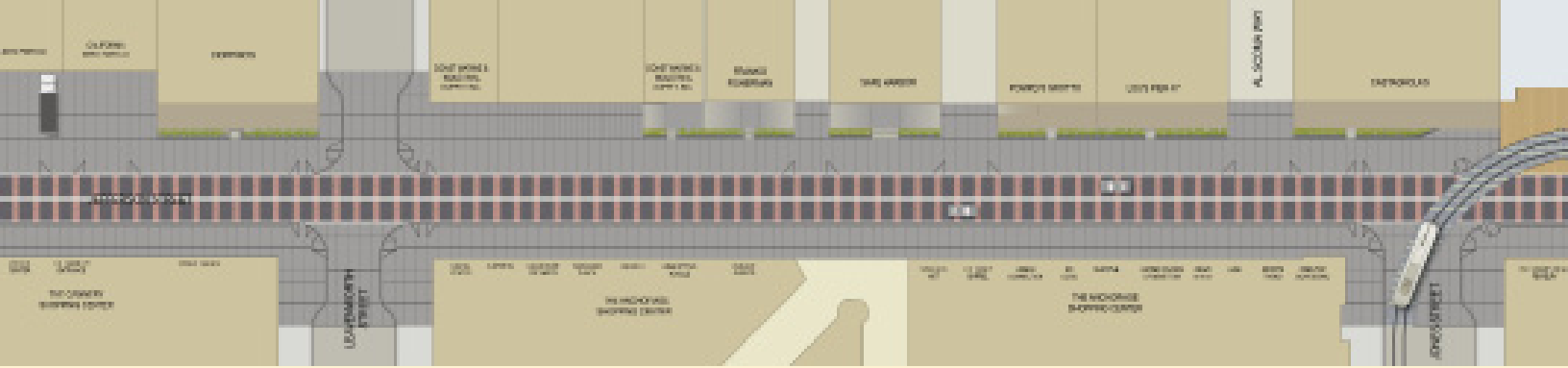
- Hold bi-monthly SFPD Community Meetings where business owners and employees can meet with officers and learn about crime in the district and ask for assistance with ongoing issues.
- The FWCBD provides cell phones to the two regularly scheduled SFPD beat officers which allows the FWCBD to easily contact them with issues that arise.
- The FWCBD has one full time District Ambassador from Wednesday through Sunday who is available to assist businesses and visitors

TRANSPORTATION & ACCESS

Not only is there easy access to several different type of transportation options for residents and visitors, Fisherman's Wharf contains two cable car turnaround locations. Being the only mobile Historic Landmarks in the world, even our transportation is an attraction! The wharf is currently serviced by the following major Metro lines:

- Powell-Mason Cable Car
- Powell-Hyde Cable Car
- F-Line Streetcars & E-Line Streetcars*
- 30 Stockton Bus
- 47 Bus
- 91 Bus
- 19 Polk Bus

*E-Line cars only operate on select event weekends.



Growth and Infrastructure

Since 2006, the Fisherman's Wharf CBD has been working closely with the San Francisco Planning Department to explore improvements to the area. The public realm plans outlined in the Fisherman's Wharf CBD Vision Plan have continued to gain momentum and support. Several Community Planning Workshops were held to help shape the program. Consensus was gained on the six key elements of the plan including:

- Pedestrian friendly streets and sidewalks
- Safe routes for bicycles
- Good for commerce
- Works well with transit
- Eases traffic congestion
- Facilitates Parking

The plan calls for the redesigning of Jefferson Street and the Embarcadero from Aquatic Park to Pier 35 and includes designs for upgrades to appearance and pedestrian usability, as well as modifications to traffic flow. Specific improvements proposed involve the widening of sidewalks, creating much-needed bicycle lanes, and providing uncomplicated instruction and access to parking facilities.

The improvements to the streets and sidewalks will result in the increased safety and overall positive experience of pedestrians and bicyclists, while also helping to alleviate the common complaint of overcrowding.

The Jefferson Street upgrade is one of five components in the plans for Fisherman's Wharf. Other components include:

- Dynamic electronic parking signage
- Open space design
- Urban design guidelines for new development
- Streetscape lighting and landscaping

The FWCBD has shared in the financing of both the Mitigated Negative Declaration and the construction drawings for the Public Realm Plan. In late 2011, the FWCBD contracted with ROMA Design to complete the detailed design plans for Jefferson Street.

In January of 2012, the CBD worked with the San Francisco Planning Department and ROMA design to produce two community meetings that were attended by over 100 people from the Fisherman's Wharf community. Speakers included Supervisor David Chiu, Boris Dramov from ROMA Design and Neil Hrushowy from San Francisco Planning.

In January of 2013, the project broke ground on Phase 1 between Jones Street and Hyde Street. The anticipated completion date is May of 2013.

The FWCBD continues its commitment to perform outreach and will continue to work with The Department of Public Works, Pacific Gas & Electric and the San Francisco Planning Department to make sure the community is keep abreast and informed on all aspects of the project. To learn more visit the FWCBD's project website: www.newjeffersonstreet.com





Area Map Of The Fisherman's Wharf Community Benefit District

