

PRIORITY DEVELOPMENT AREA PROFILE REPORT
DOWNTOWN OAKLAND SPECIFIC PLAN: EXISTING CONDITIONS

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DOWNTOWN OAKLAND SPECIFIC PLAN: EXISTING CONDITIONS PDA PROFILE REPORT

- 1 introduction
- 2 background
- 3 land use, urban form & infrastructure
- 4 demographic, socio-economic and market conditions
- 5 initial community input

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DOVER, KOHL & PARTNERS
town planning





PRESERVATION PARK

1

INTRODUCTION

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introduction

Downtown Oakland is a place for everyone. The Downtown Oakland Specific Plan process is a community-driven planning project to define the vision for the future of downtown with citizens, activists, businesses and area stakeholders. A transparent and public effort, the creation of the Specific Plan is centered around a ten day-long charrette and design workshop, in an on-site studio on Broadway in Oakland. The public process will continue through 2016, allowing for a series of feedback loops with the community.

Included in the PDA Profile Report is an initial analysis of existing conditions in the Downtown Oakland Specific Plan project area. This analysis will inform the development of plan alternatives in the upcoming phases of work.

Preliminary analysis in this document is organized as follows:

Section 2: Background and Objectives

The development of the City of Oakland includes a unique history that has evolved over the course of time. Section 2 provides a snapshot of how downtown used to look and outlines the preliminary objectives of this planning effort.

Section 3: Land Use, Urban Form & Infrastructure

The existing land use, urban form, and infrastructure are analyzed via a series of graphics for the downtown study area. This section also includes a description of on-going studies that relate to the project. At the end of the section, a catalogue and initial urban analysis of different neighborhoods and the existing urban character within downtown Oakland is described and illustrated.

Section 4: Existing Economic Profile

An overview of existing demographics, housing and market conditions is discussed in Section 4. A detailed look at what is currently going on in downtown Oakland is described and will be used to inform the development of plan alternatives.

Section 5: Initial Community Input & Next Steps

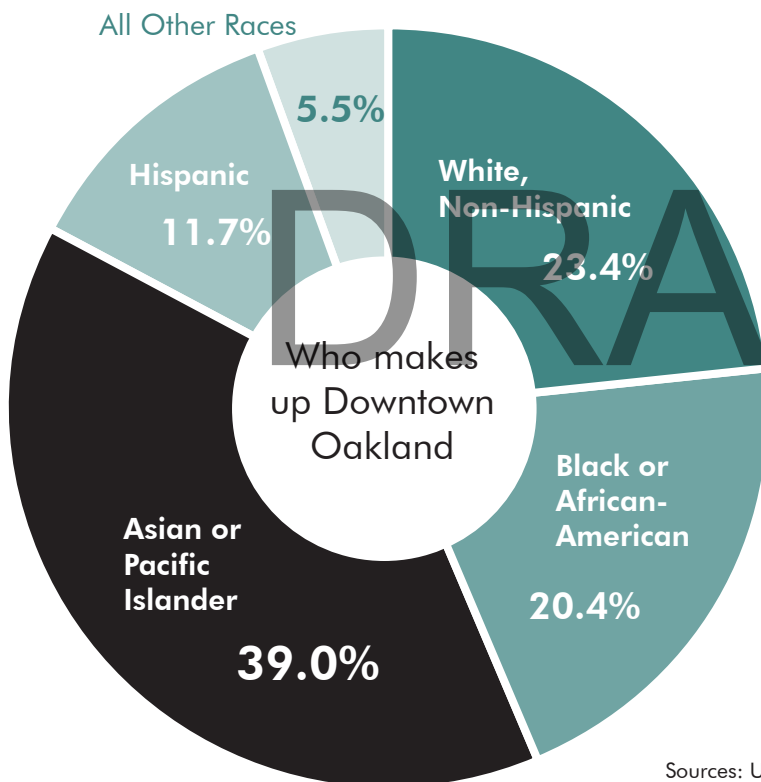
Section 5 provides a snapshot of public input from the initial kick-off event for the Downtown Oakland Specific Plan. A list of upcoming public events is also included.



demographic profile



The Greater Downtown's population has increased tremendously as it has become a focus for new residential development. Between 2000 and 2013, it increased by 23 percent, while the City's overall population declined by 0.6 percent.



Oakland is the 3rd largest city in the San Francisco Bay Area. Due to a steady influx of immigrants during the 20th century, along with thousands of African-American war-industry workers who relocated from the Deep South during the 1940s, Oakland is one of the most ethnically diverse major cities in the country.

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.



60%
of households are
single-person

The Greater Downtown has a much larger share of single person households than Oakland as a whole. Approximately 60 percent of households in the Greater Downtown are single-person households, while only nine percent are families with children.



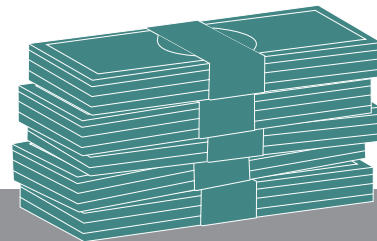
9%
of households are
families
with children



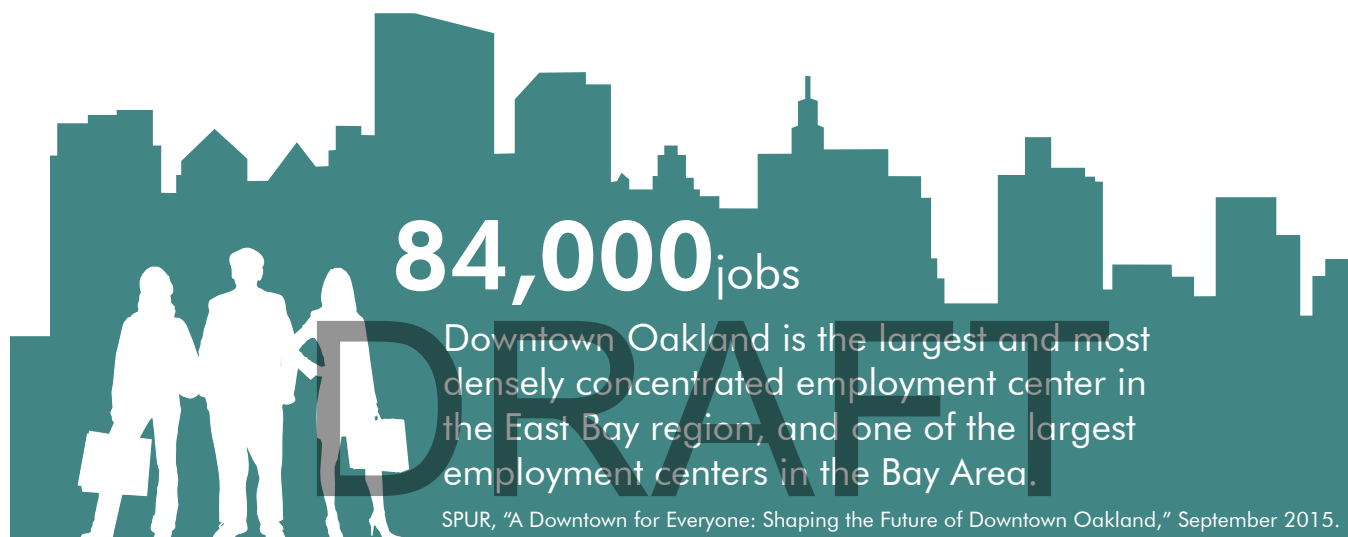
12%

of households
in Downtown
have a household income

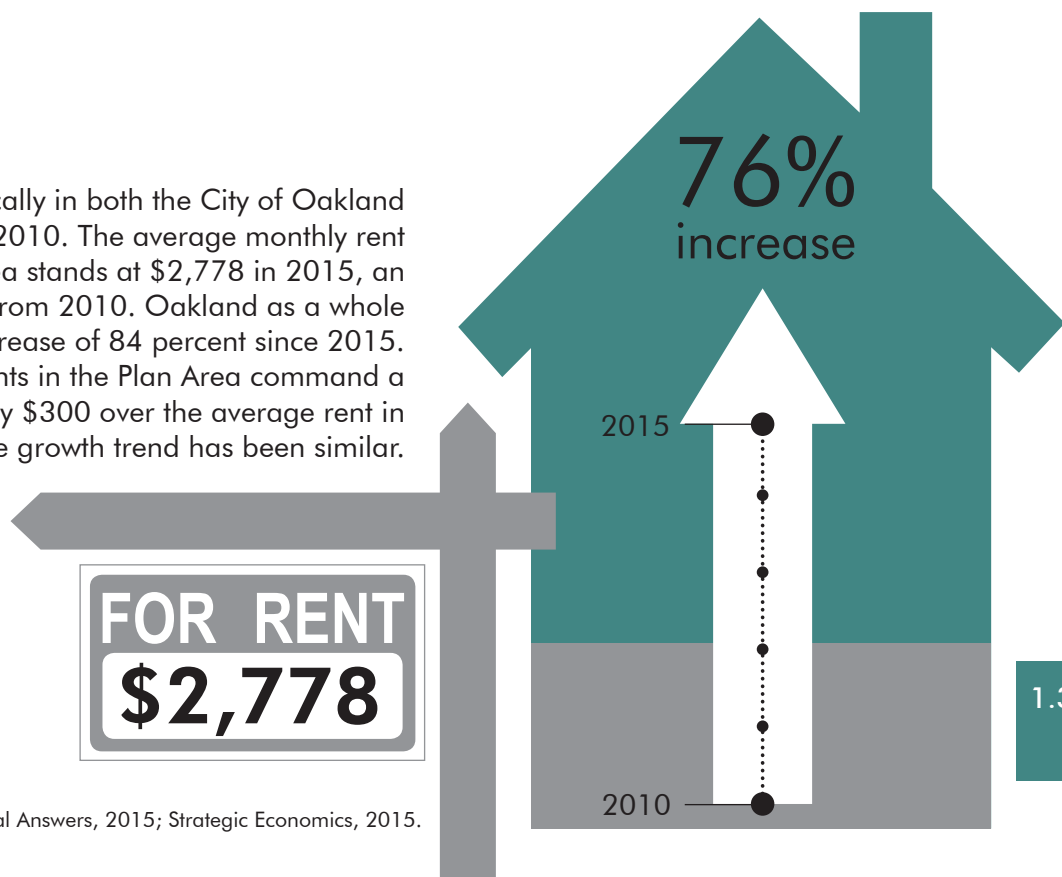
less than **\$10,000**



Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015



Rents have risen dramatically in both the City of Oakland and the Plan Area since 2010. The average monthly rent for units in the Plan Area stands at \$2,778 in 2015, an increase of 76 percent from 2010. Oakland as a whole has seen a similar increase of 84 percent since 2010. Recently built apartments in the Plan Area command a premium of approximately \$300 over the average rent in the city, but the growth trend has been similar.



Sources: Real Answers, 2015; Strategic Economics, 2015.



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BACKGROUND

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background

The City of Oakland has evolved over the course of time—from a lush environment full of Oak trees, to a place with a bustling downtown full of people and economic activity, through a series of historic events, to a City with a dynamic urban core where civic life is celebrated.

Like other American cities over the past several decades, the population in downtown Oakland has fluctuated, and at present is on the rise. With a unique and diverse community living, working and enjoying entertainment downtown, the heart of the City is both active and interesting.

The overall objective for the Downtown Oakland Specific Plan is to work with citizens, activists, and other stakeholders to define a vision for the future. Working together, the project will result in a plan that illustrates how downtown is envisioned to look and describes the needed policy to implement the desired vision.



Historic postcard view along Telegraph Avenue





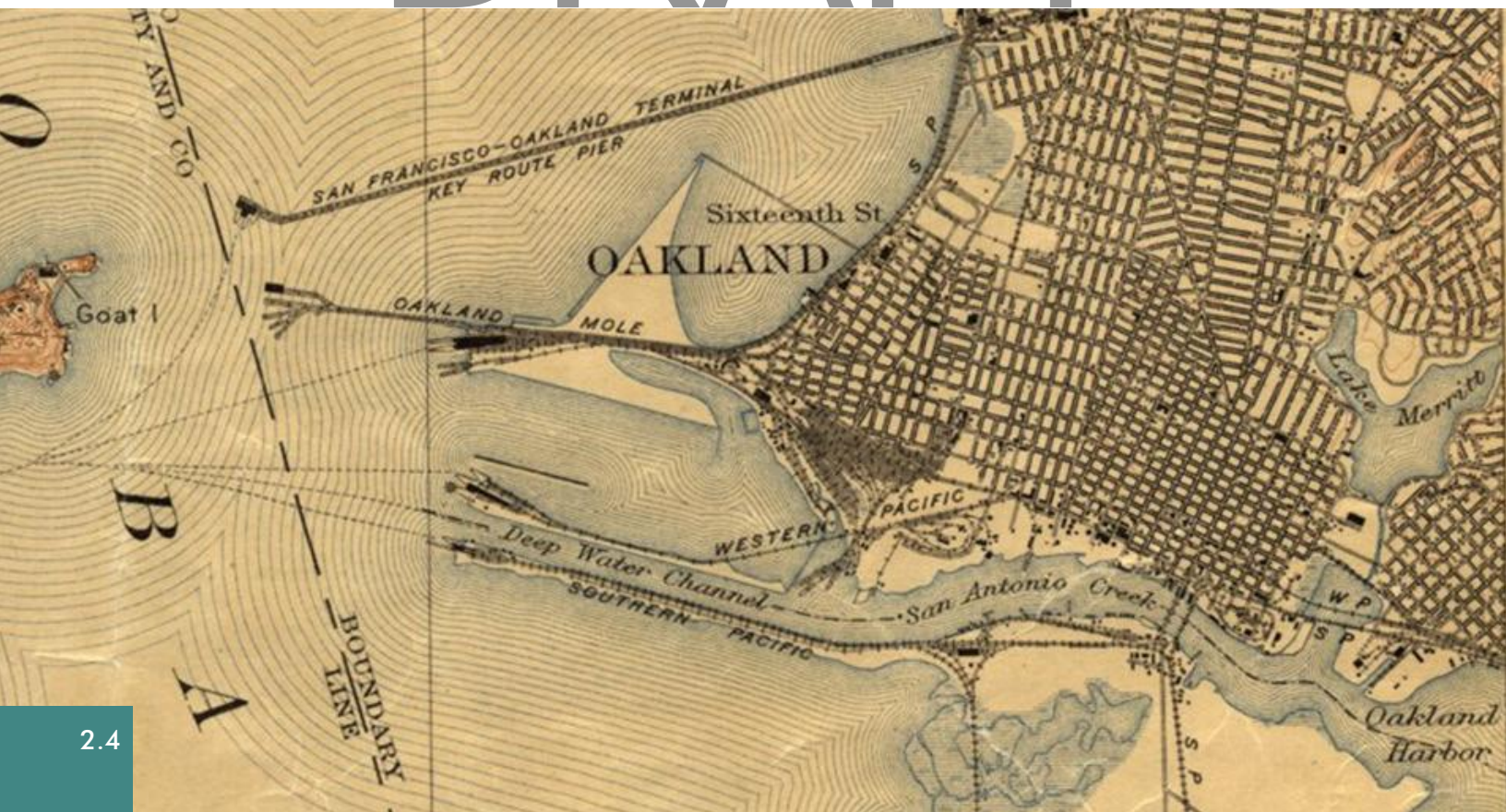
Aerial view looking south towards Lake Merritt and downtown Oakland, 1900

A preliminary list of project goals, established in order to meet the overall objective of the Downtown Oakland Specific Plan, include the following:

- Visualize the ways to **restore practical, prosperous, equitable and delightful** places in the heart of the City, for residents, businesses, employees, and visitors.
- Establish policy to **implement the vision for the future** of downtown Oakland, incorporating land use, transportation, economic development, open space, landscape design, historic preservation, cultural arts, and social equity.
- **Coordinate with on-going efforts** at the City of Oakland in order to establish a cohesive vision for future development downtown (including the Circulation Study, the Parking Study, Complete Streets, and others).
- **Work with members of the community** and area stakeholders in an **interactive and hands-on** setting, to create a plan for downtown that incorporates citizen feedback.
- Ensure that **pedestrians, cyclists and public transportation** are given the highest priority in the plan.

- Incorporate environmental review throughout the planning process to facilitate a CEQA process that is thorough yet concise.
- Establish clear implementation priorities and frame a realistic and understandable set of instructions for both public and private actions.

As the vision for the future develops throughout the process, a series of feedback loops with the community will test and check these goals, ensuring that the resulting plan is consensus-based. These preliminary ideas and concepts will be shaped and re-imagined during the creation of the Specific Plan.

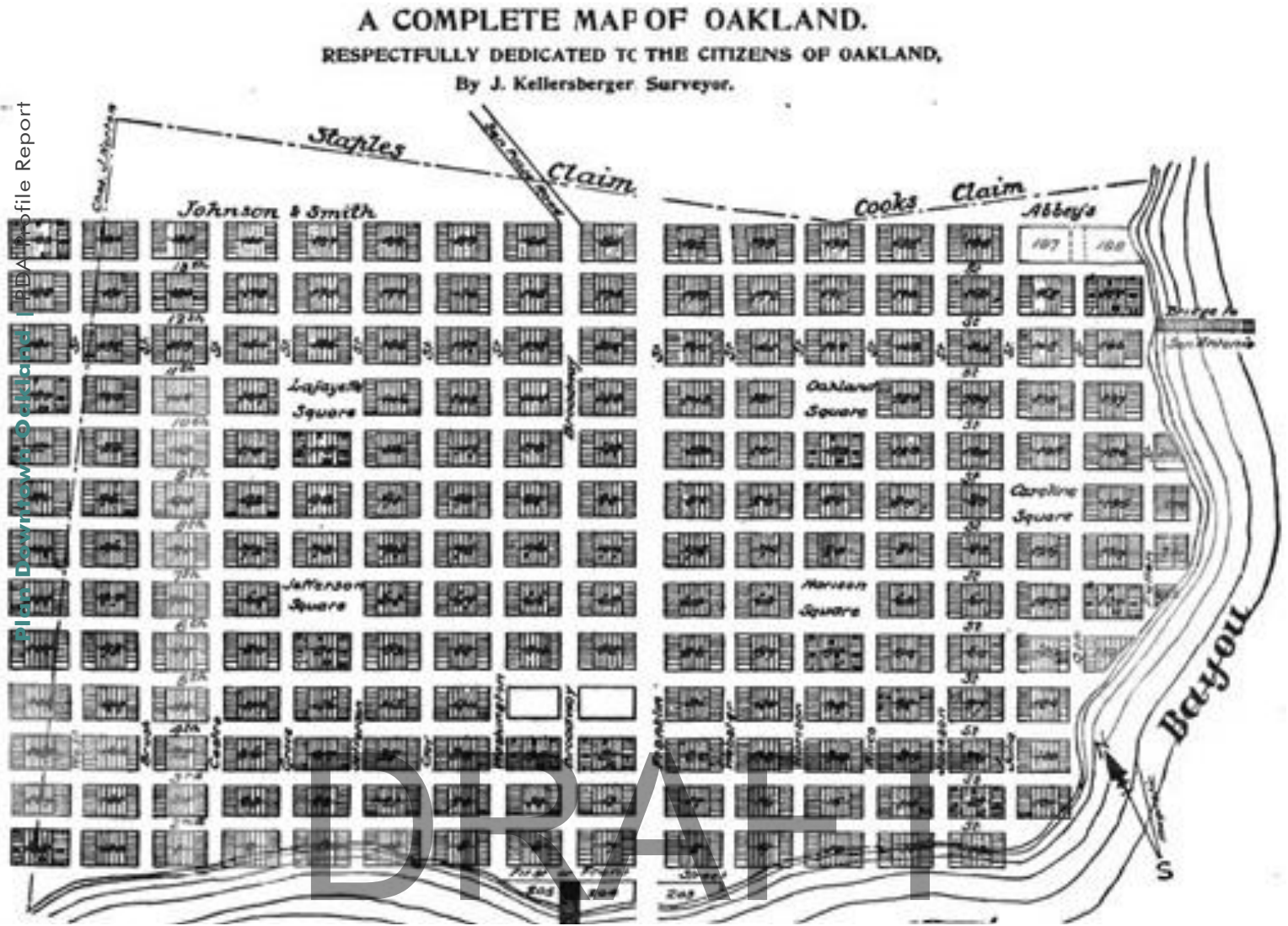


Historic maps of Oakland, depicting the evolution of urban form over the course of time.



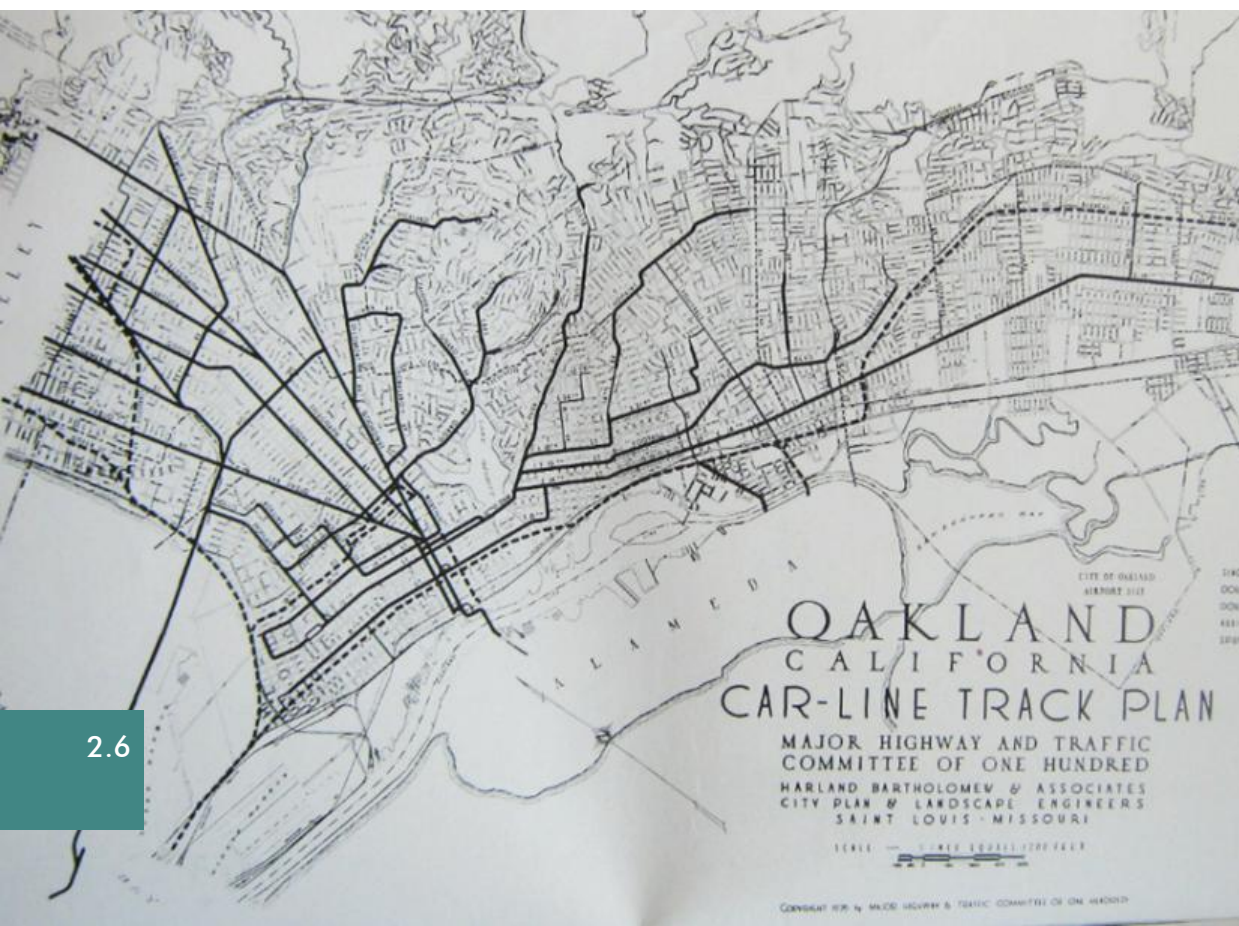
Left: Sanborn map, downtown Oakland, 1889; Above: Postcard view looking north on San Pablo Avenue





Above, left:
Kellersberger
Map, Oakland,
California, 1852

Below, left: Map
of Oakland and
Vicinity, 1912



3

LAND USE, URBAN FORM & INFRASTRUCTURE

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OAKLAND
30 - RL GRIME
31 - THE DEVIL MAKES THREE
FEB 7 - LONDON GRAMMAR

Downtown Oakland

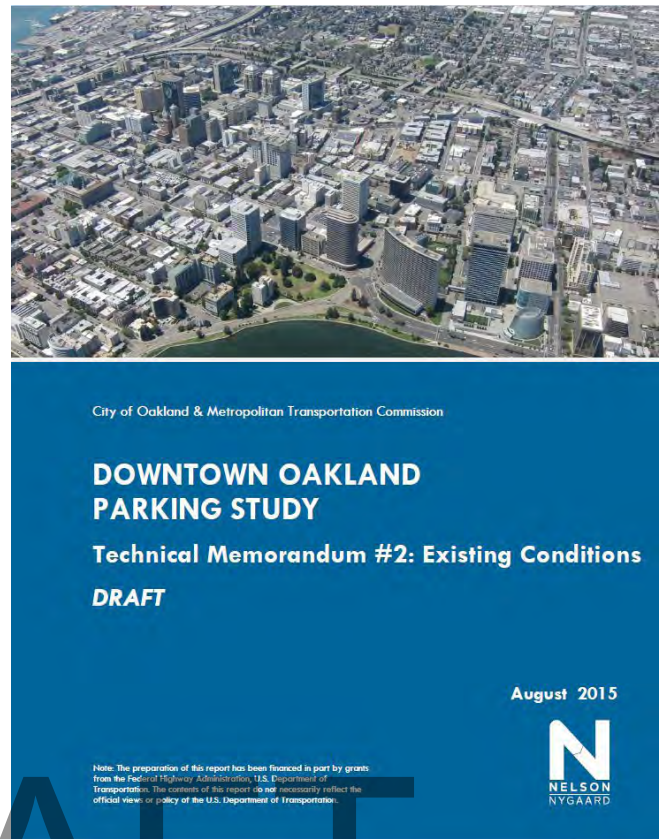


The Downtown Oakland Specific Plan process will consider future land use, urban design, transportation, economic and environmental factors. The Specific Plan process will build on the work already completed in the following planning efforts as well as several others:

- Central Estuary Plan
- Lake Merritt / Chinatown Station Area Plan
- Broadway Valdez Specific Plan
- West Oakland Specific Plan
- Harrison Street/Oakland Avenue Community Transportation Plan
- International Boulevard Transit-Oriented Development Project



There are several on-going studies occurring in the downtown area that have a timeline and content that overlaps with the Downtown Specific Plan. The Specific Plan team will collaborate with each of these teams throughout the project and ensure that pertinent information is included and considered between each of the studies.



The Downtown Oakland Specific Plan team will coordinate with the following active projects in the downtown:

- Comprehensive Circulation Study
- Downtown Oakland Parking Study
- Complete Streets Study
- Impact Fee Nexus Study
- Other relevant projects currently occurring in downtown Oakland

On the following pages a preliminary look at existing urban and infrastructure conditions is depicted on a series of basemaps. Photoboards, organized to describe different neighborhoods within the study area, follow the analysis maps.

analysis maps

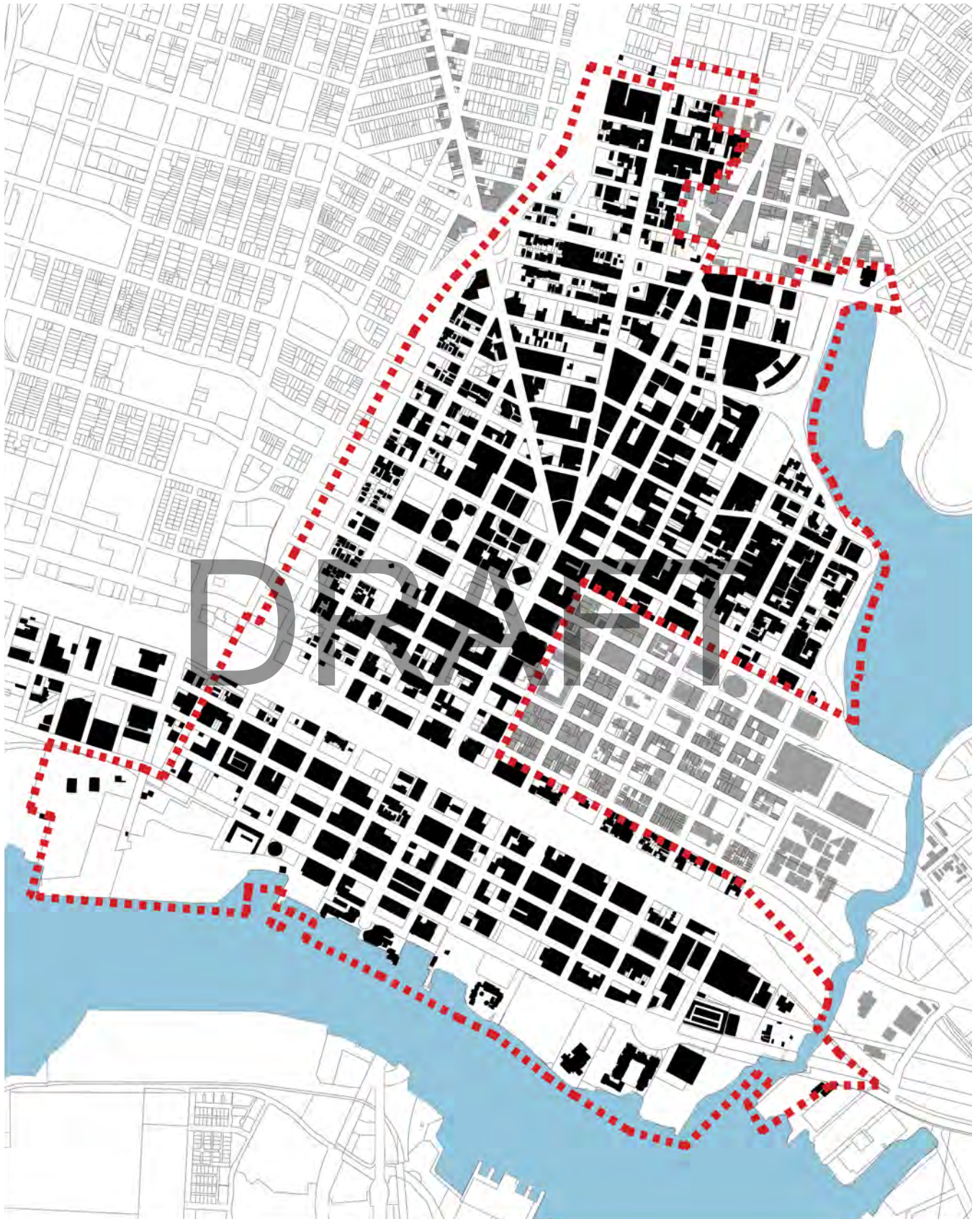
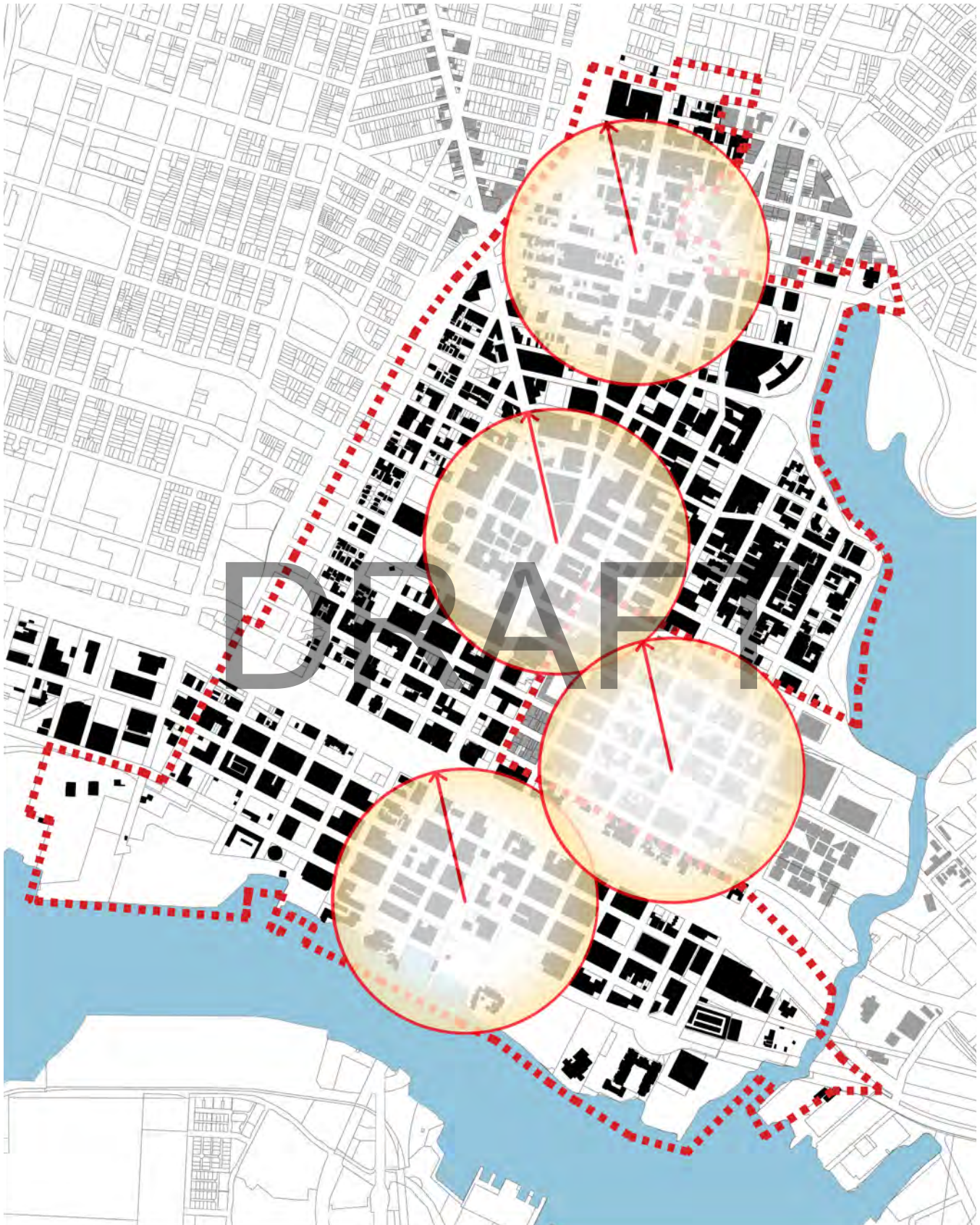


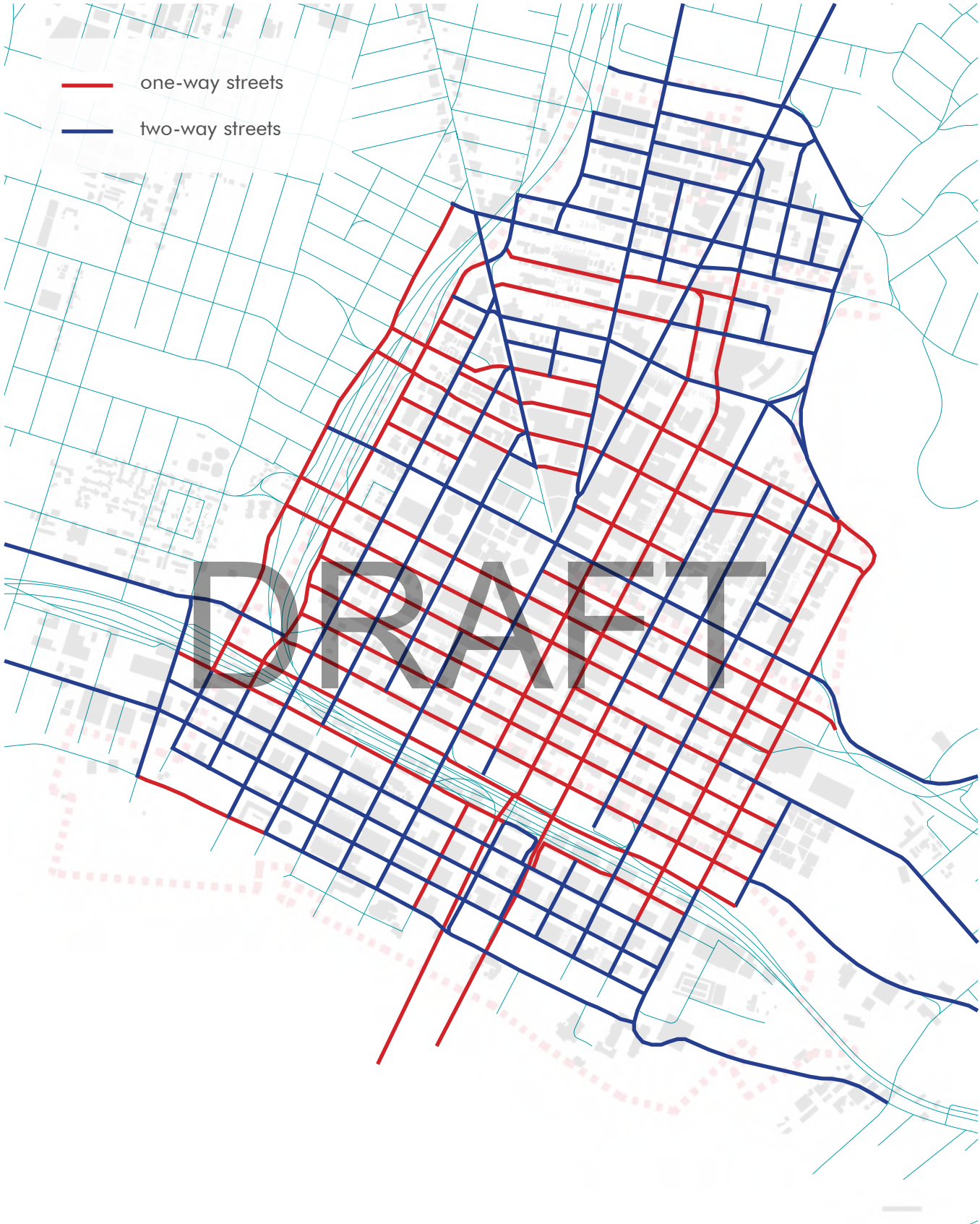
Figure-ground Plan

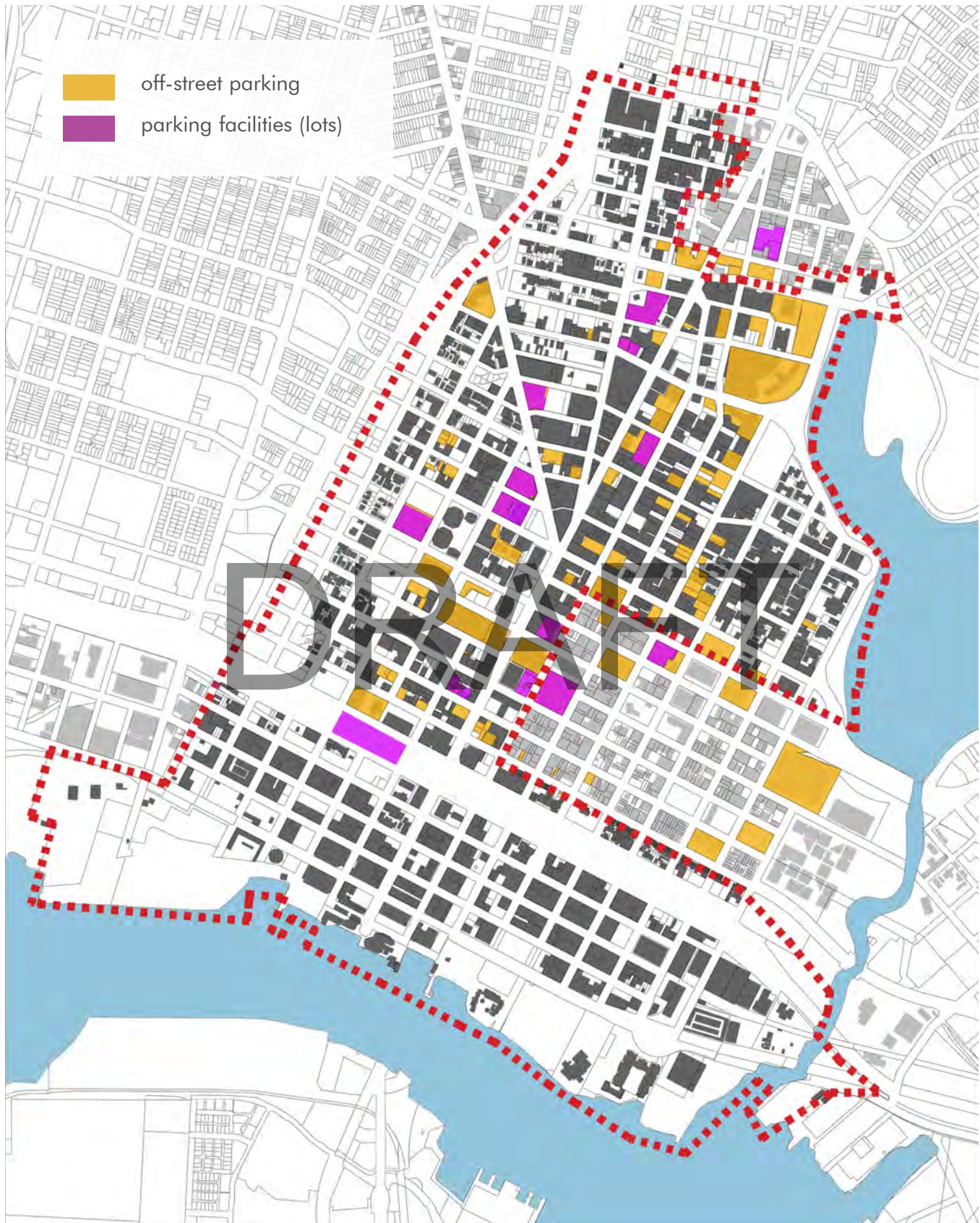


5-minute Walk

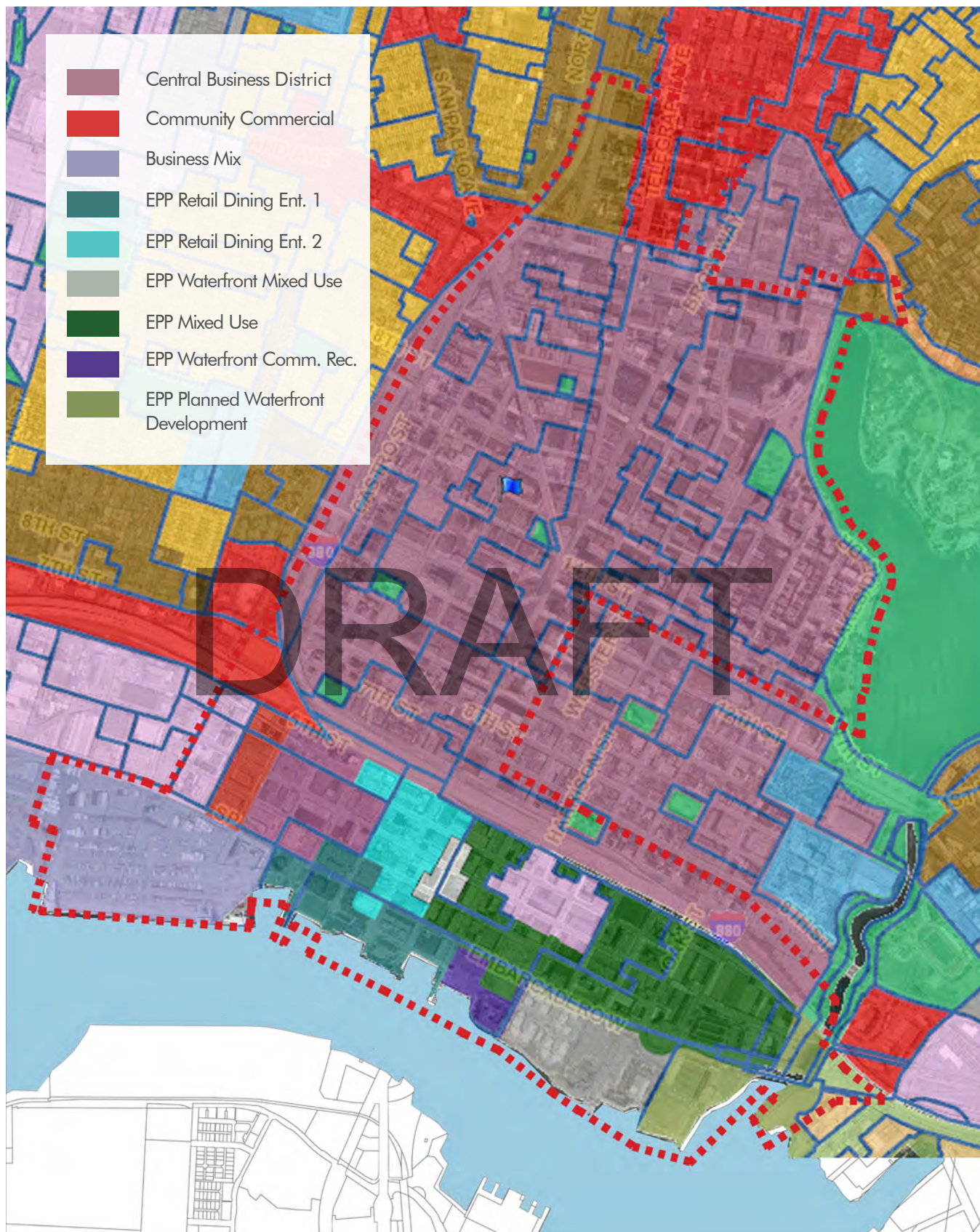


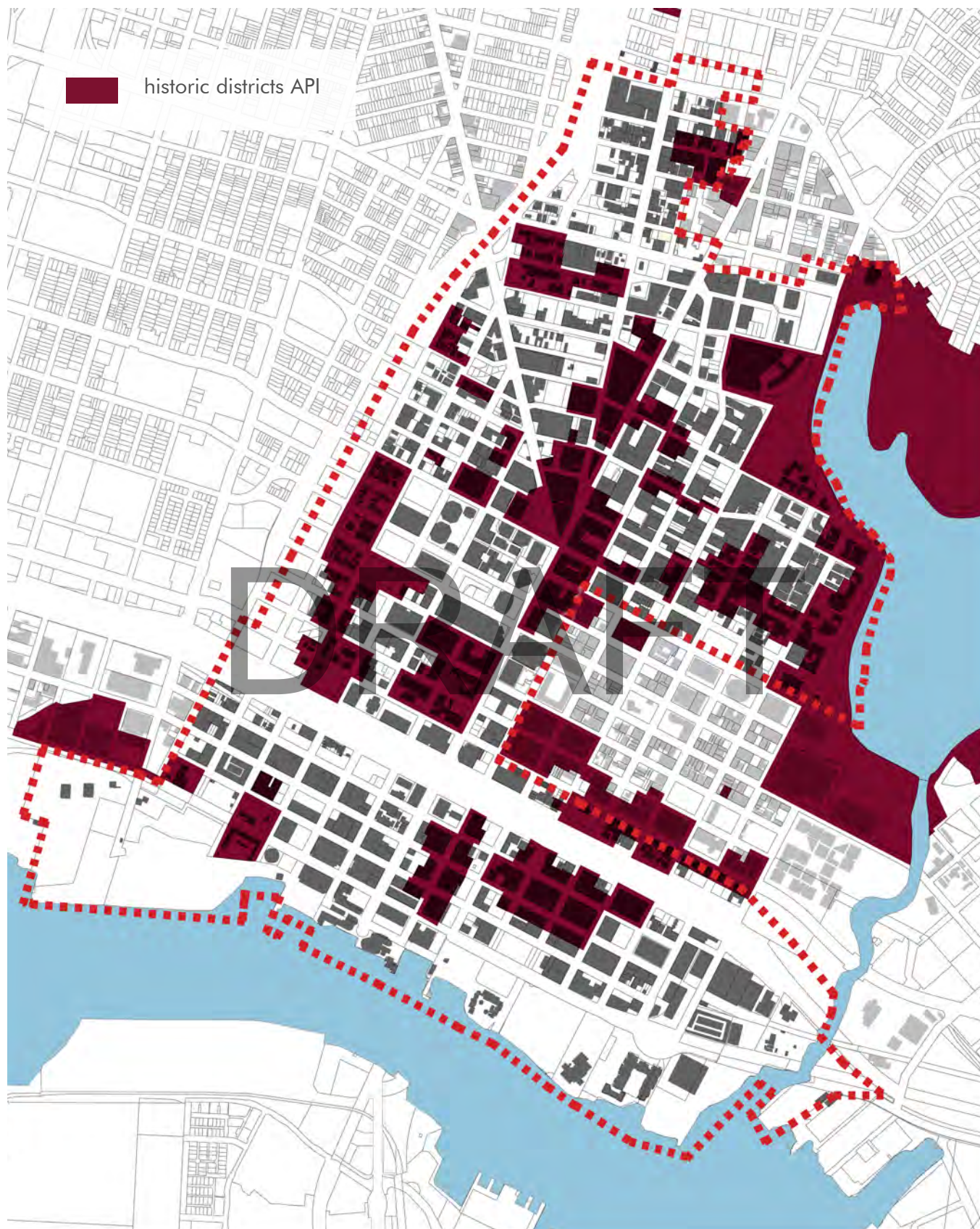




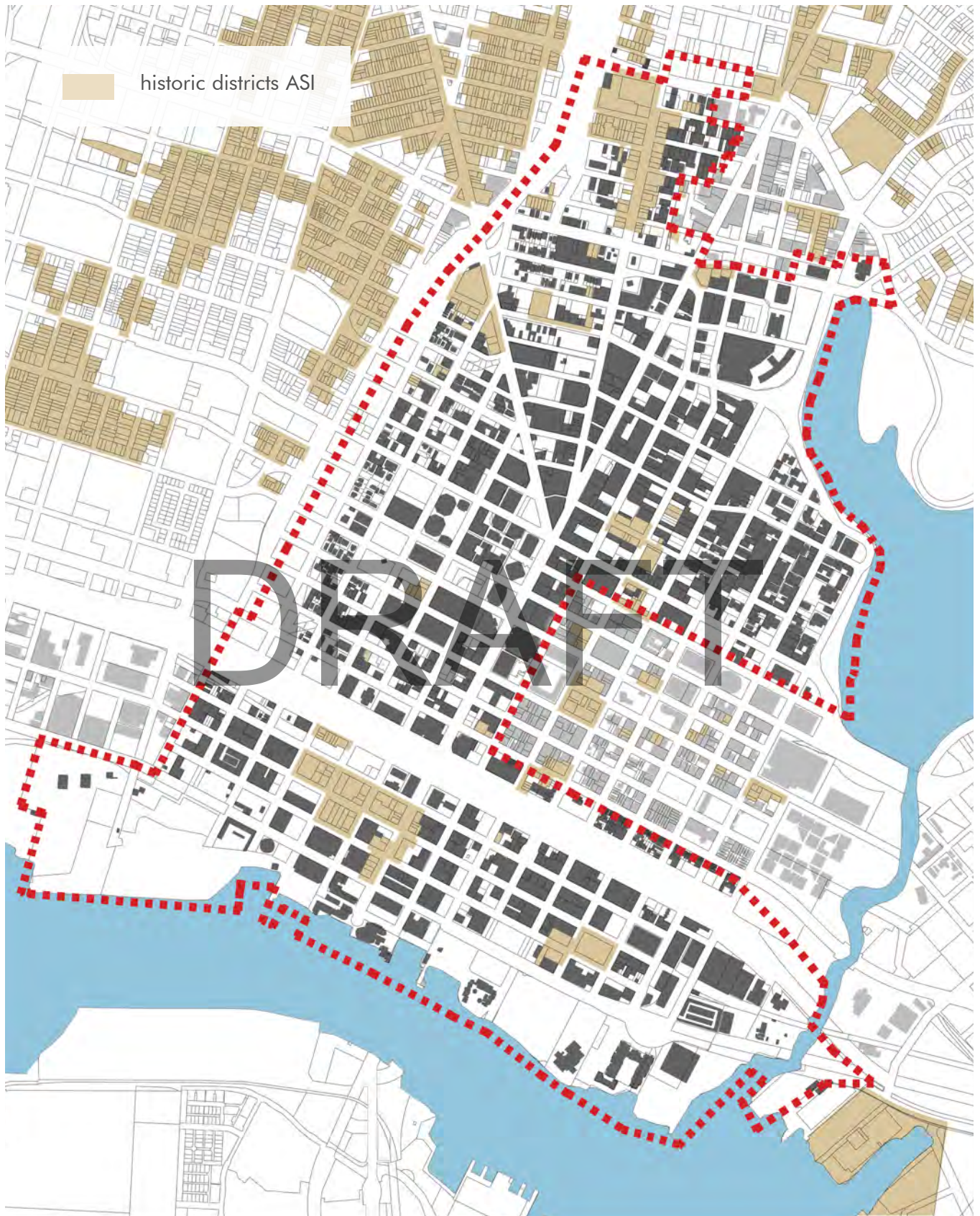


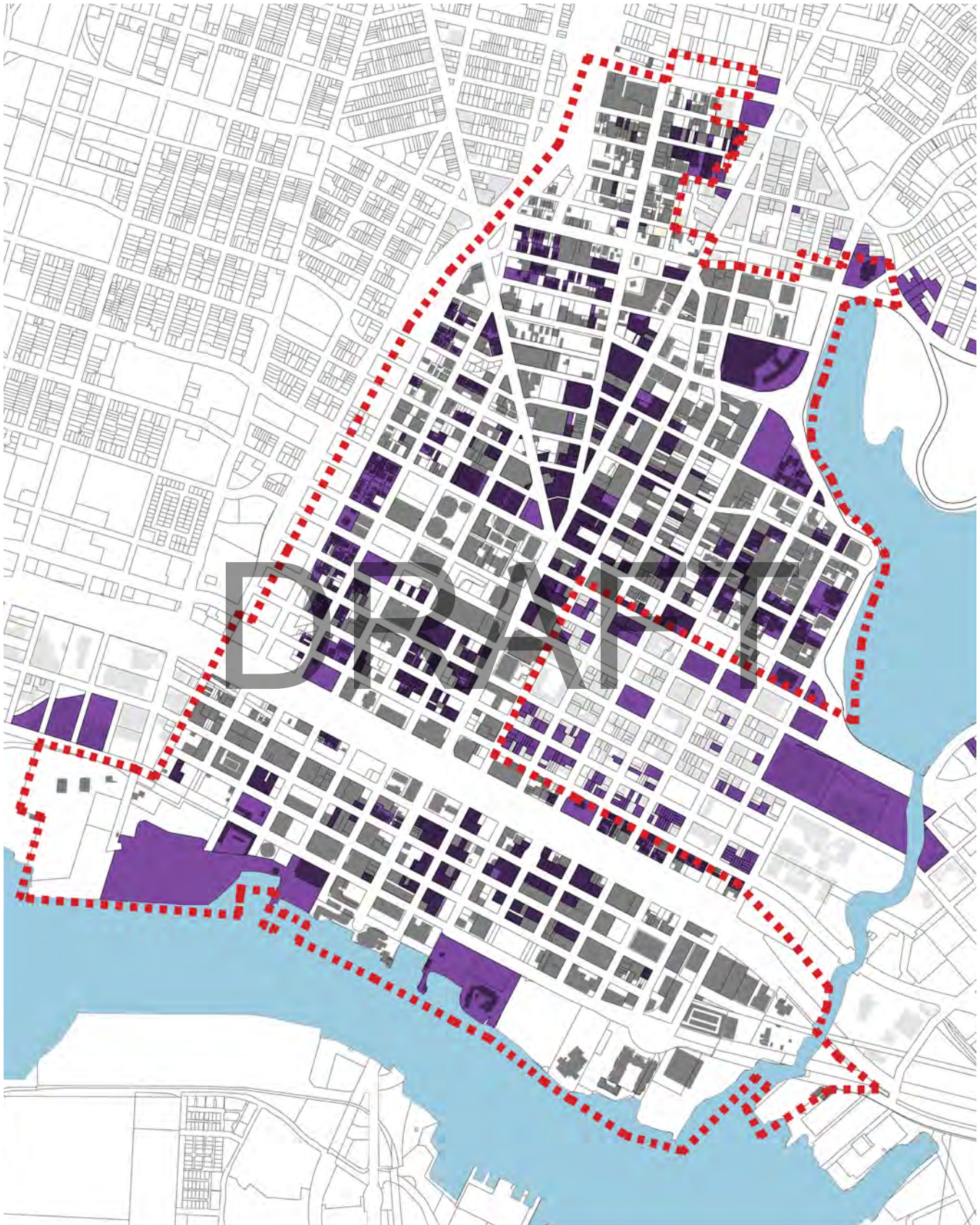
Off-street Parking & Parking Facilities





Historic District_API



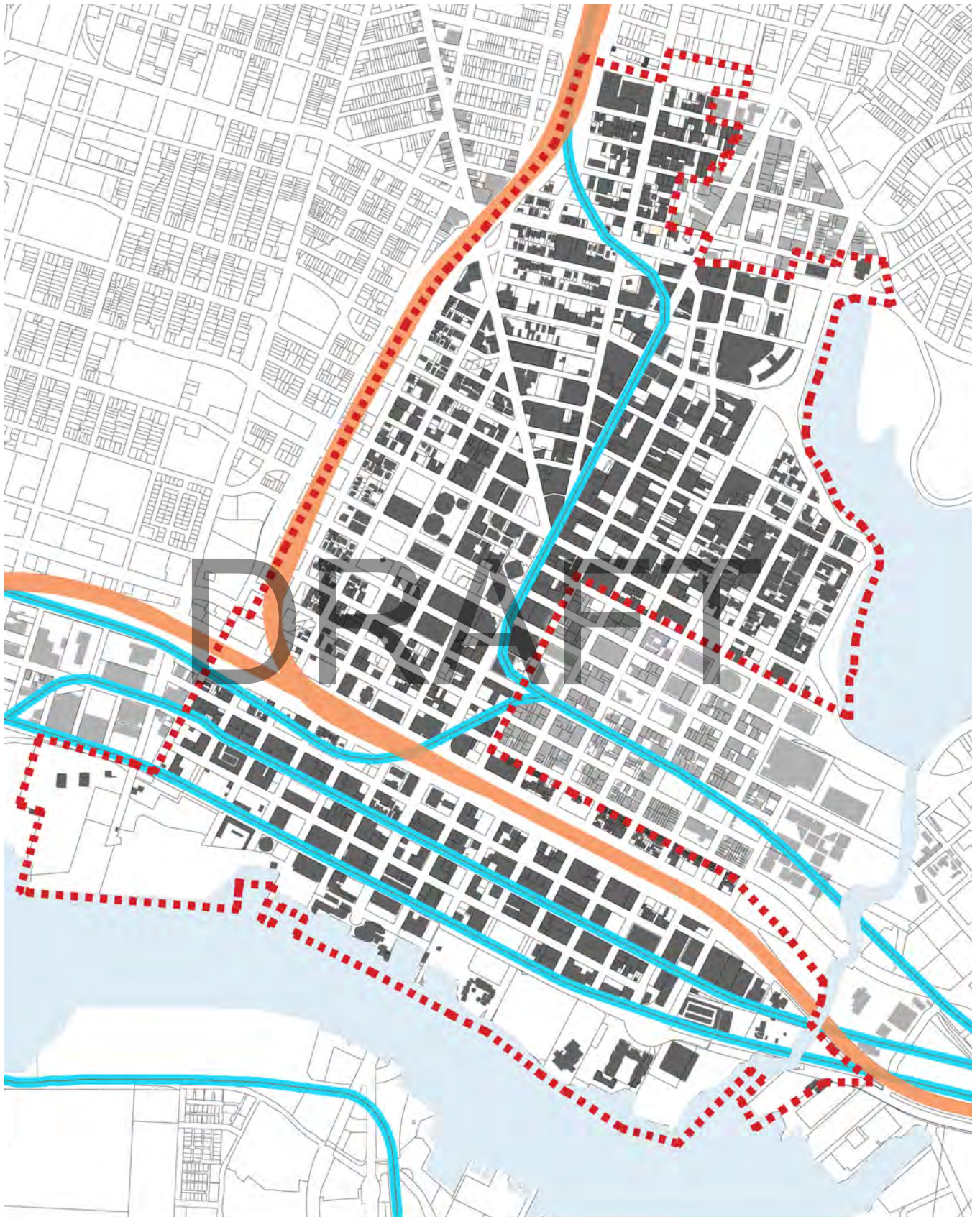


Local Historic Register



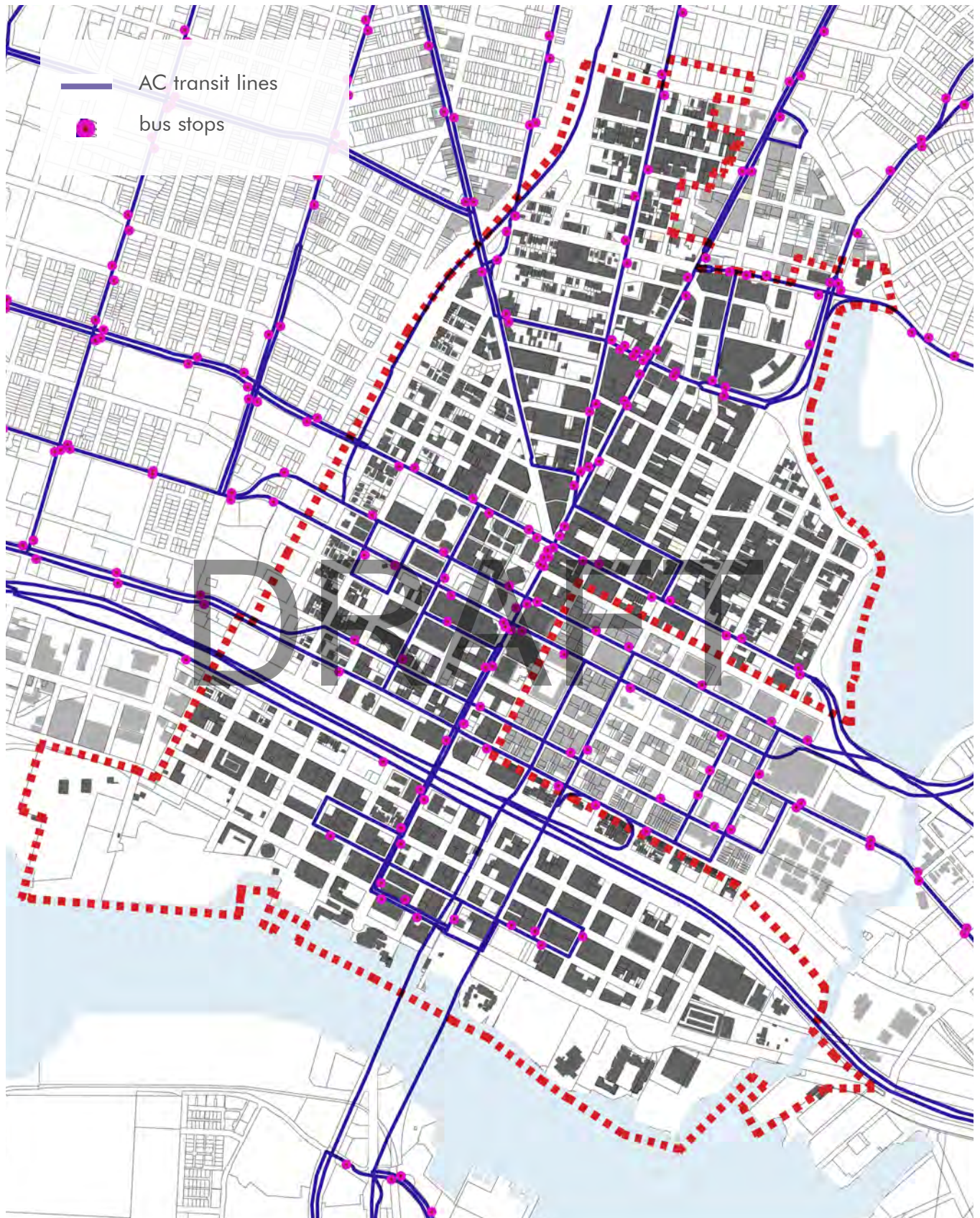


Street Trees





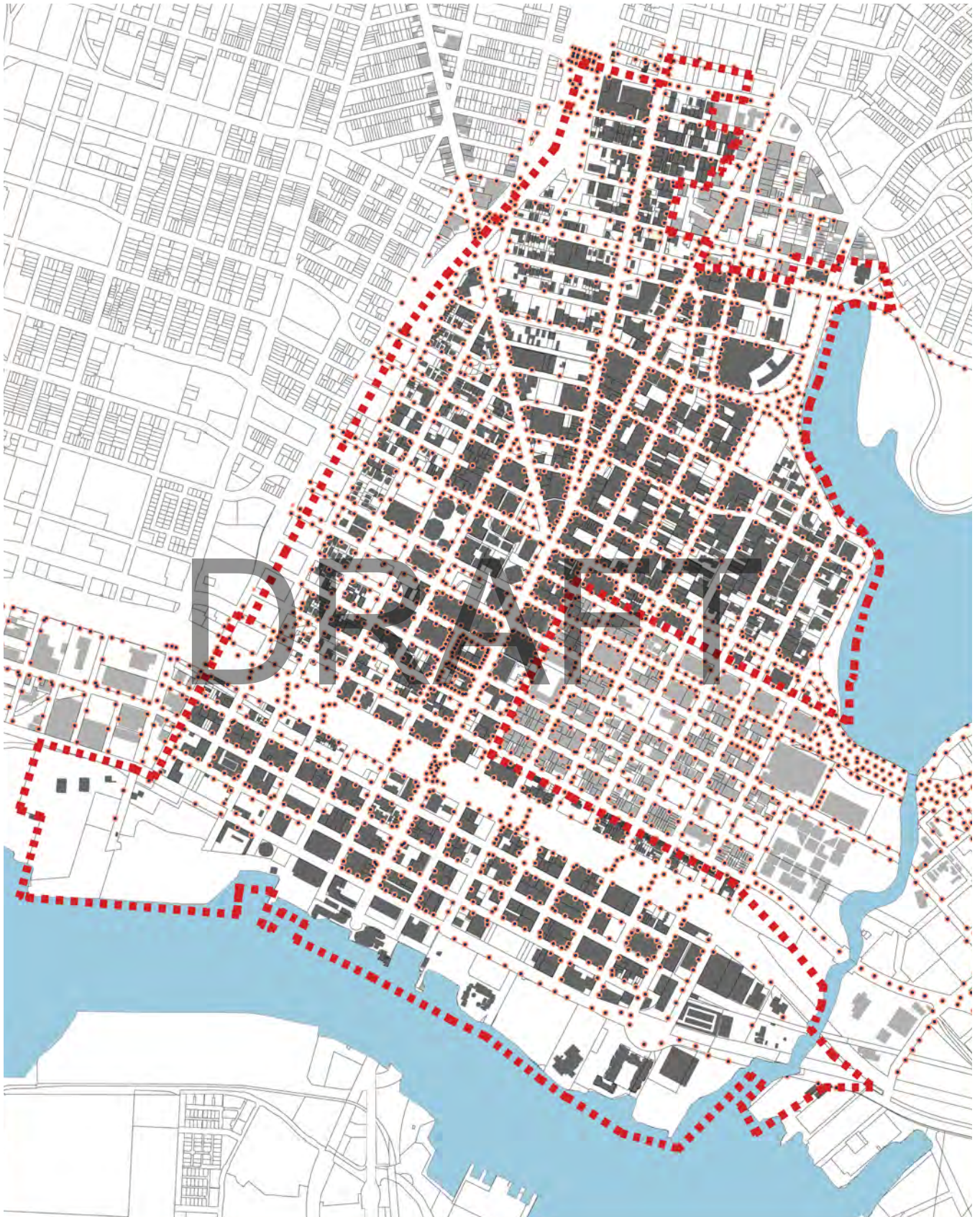
BART

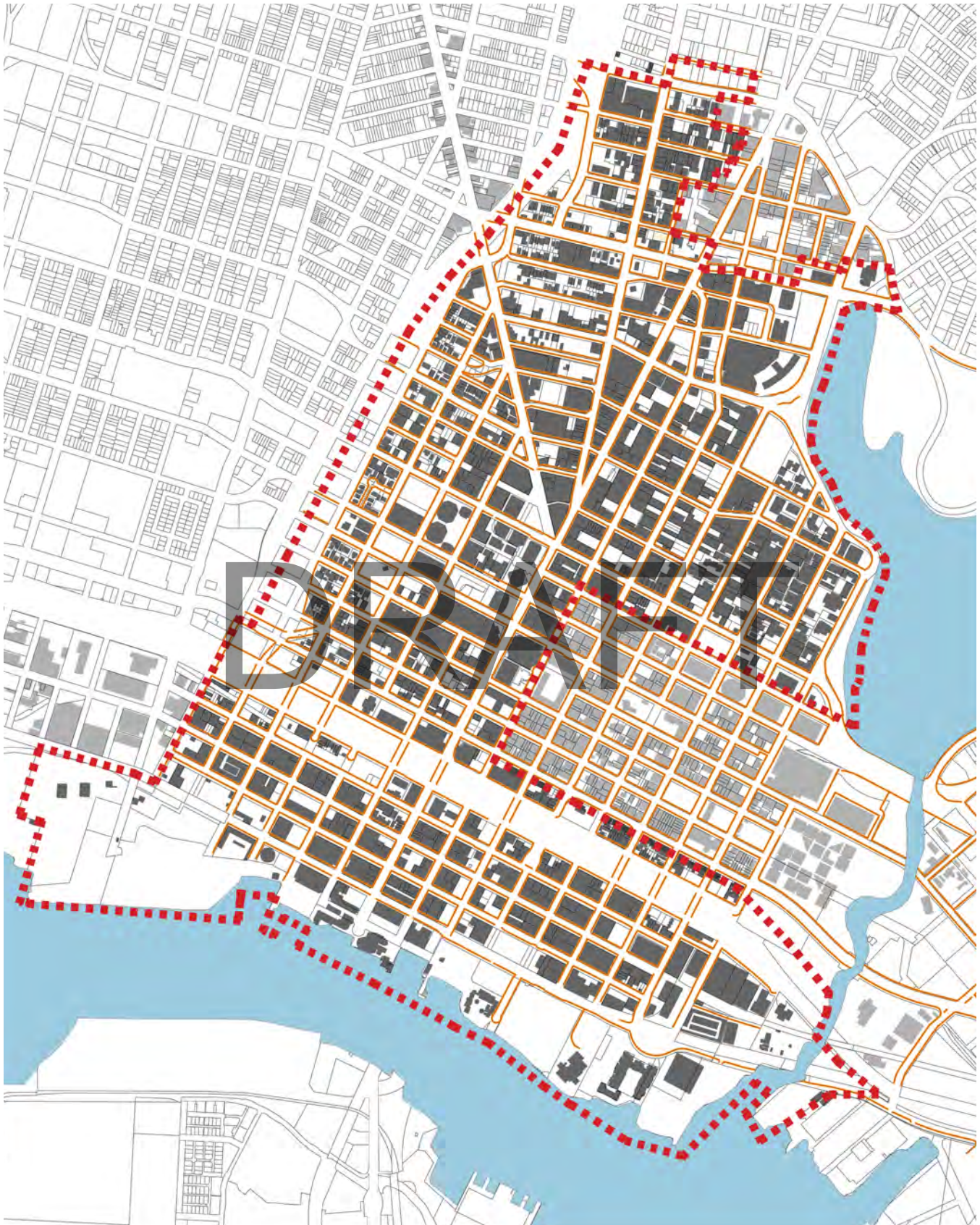


AC Transit Lines and Bus Stops



Existing Bikeways & Bike Parking

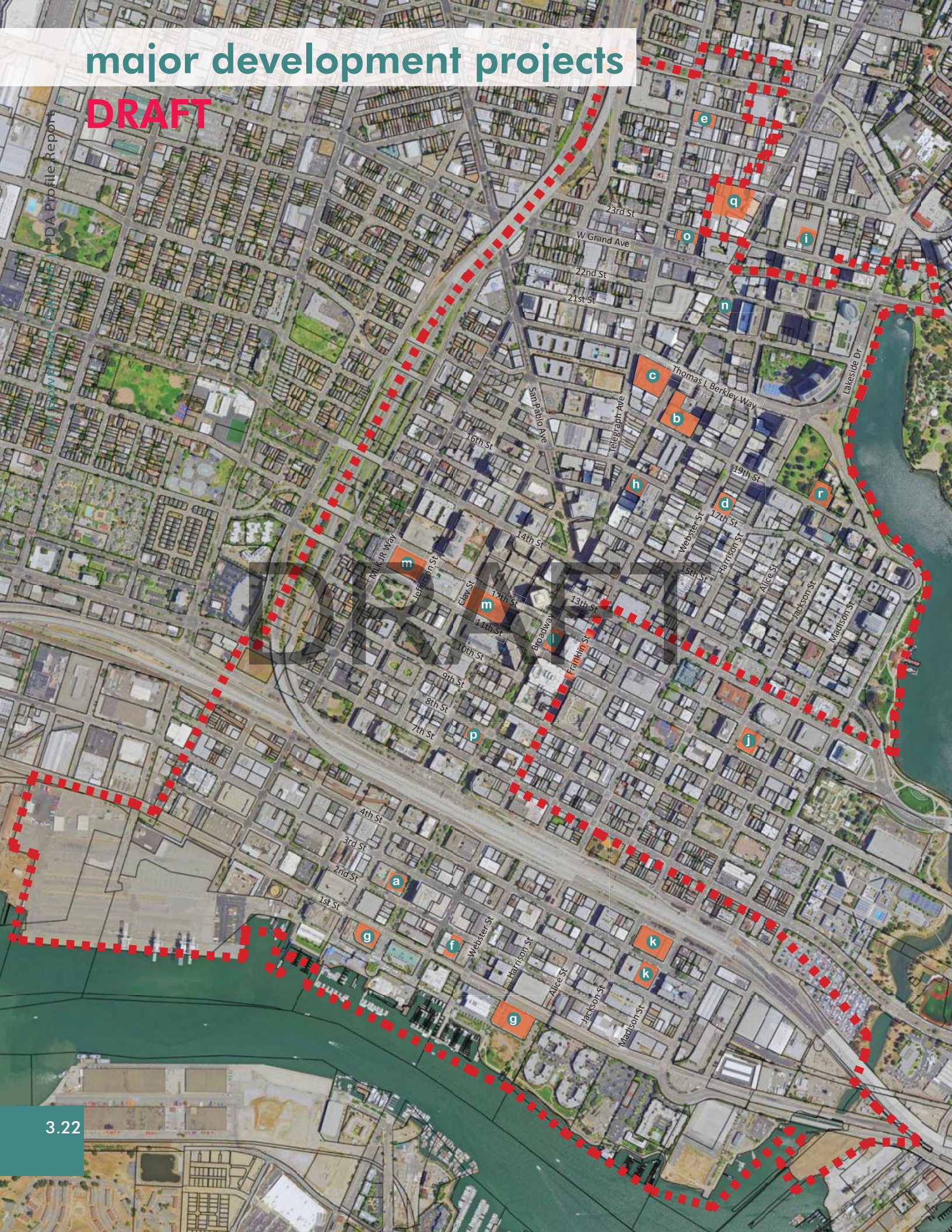




Existing Sidewalks

major development projects

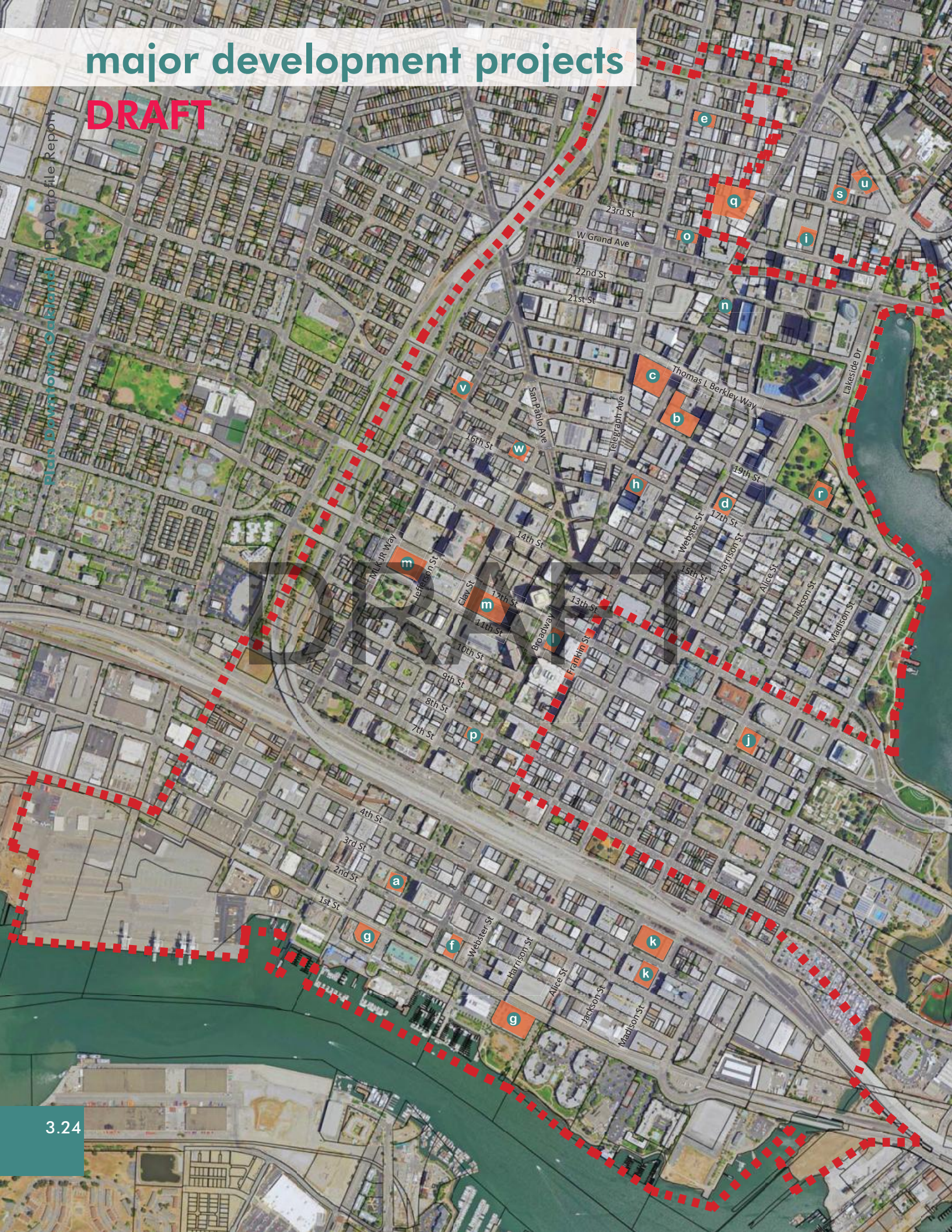
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- a**  201 Broadway
48 residential units
Austen Group
- b**  1900 Broadway
294 residential units
11,000 sf commercial
under review
Devel.: Seth Hamalian
- c**  Uptown Station
1955 Broadway
Mixed-Use
Rehab/Reuse - Uber
under construction
- d**  1700 Webster
250 residential units
Devel.: Gerding Edlen
- e**  2538 Telegraph Ave
Mixed-Use; Mark Borusk
97 residential units
9,000 sf commercial
entitled
- f**  377 2nd Street
Mixed-Use
96 residential units
approved
- g**  Jack London Square
Major redevelopment
new towers planned
under construction
Devel.: Ellis Partners
- h**  1640 Broadway
Mixed-Use Tower
247 residential units
approved
- i**  Valdez & 23rd Street
175 residential units
City-owned & ENA w/
Thompson-Dorfman
- j**  1110 Jackson Street
71 residential units
All affordable
Devel.: EBALC &
Oakland Housing Auth.
- k**  Fourth & Madison
430 Jackson
Mixed-Use
330 residential units
under review
- l**  1100 Broadway
Mixed-Use + Rehab
310,285 sf office
9,810 sf retail
approved
- m**  City Center Lot T5/6
Mixed-Use; Strada
approved for office
reapplying with a
residential focus
- n**  Kapor Center
2134 Broadway
4th story addition
44,000 sf commercial
under construction
- o**  459 23rd Street
Mixed-Use
114 res rental units
3,000 sf commercial
pre-application
- p**  459 8th St
Mixed-Use
50 residential units
4,000 sf commercial
under review
- q**  The Hive
2323 Broadway
105 residential units
Signature Development
- r**  Emerald Views
222 19th St
370 residential units
under review
Devel.: Joe O'Donoghue

major development projects

DRAFT



(continued)

s



Valdez & 24th Street
DETAILS

t



City Center @ Jefferson
60,000 sf of office
Shorenstein

u



227 27th Street
400 residential units
Holland Development

v



1701 MLK Jr. Way
26 residential units
Resources for
Community
Development

w

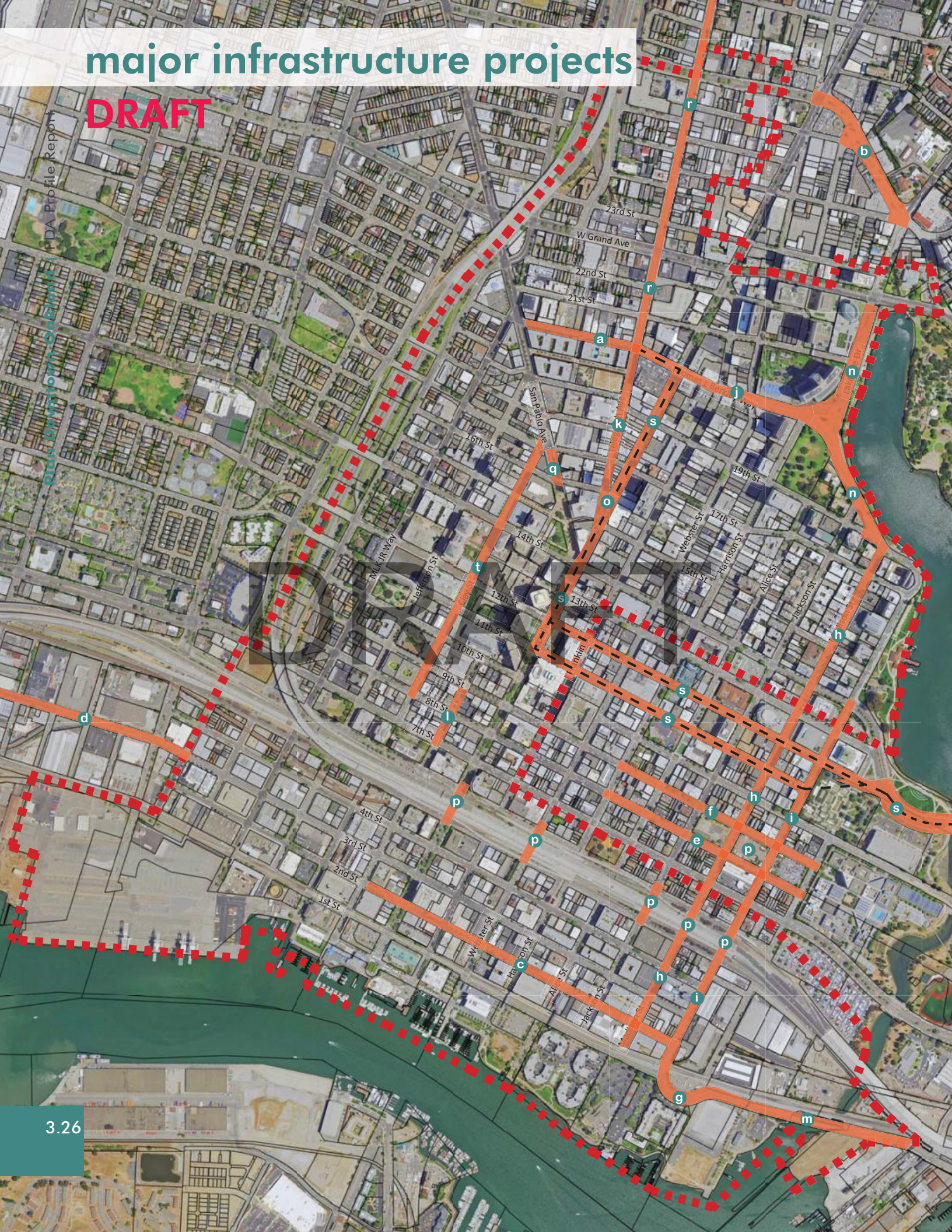


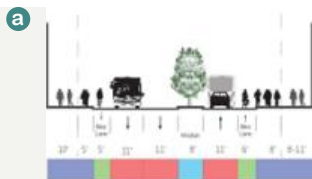
1601 Clay Street
20 residential units
Citrine Advisors

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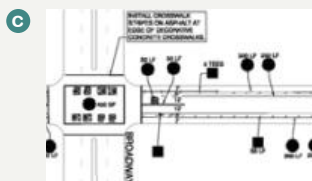
major infrastructure projects

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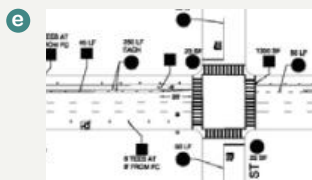




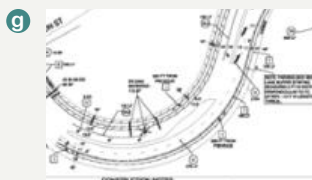
a 20th Street Complete Streets Study
Road diet w/bike lanes
November 2013



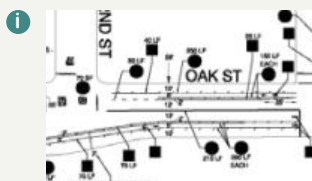
c 2nd Street Restriping
Bike lane striping plan
January 2015



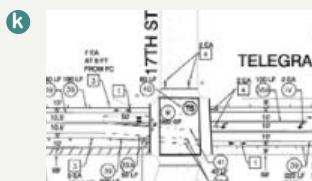
e 8th Street Restriping
Bike lane striping plan
January 2015



g Embarcadero Restriping
Bike lane striping plan
September 2015



i Oak Street Restriping
Bike lane striping plan
January 2015



k Telegraph Restriping
Bike lane striping plan
March 2015



m Lake Merritt to Bay Trail & Embarcadero bridge reconstruction
www.lm2bt.com



o Latham Square Street & Public Space Redesign
August 2015



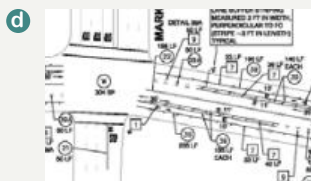
q San Pablo Green Street Green Stormwater Pilot
August 2015



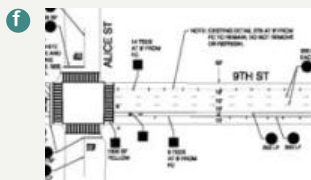
s East Bay BRT Project
Service set to begin in early 2017



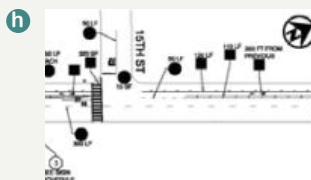
b 27th Street Gateway road narrowing & streetscape improvements
2015



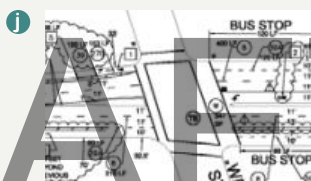
d 3rd Street Restriping
Bike lane striping plan
September 2015



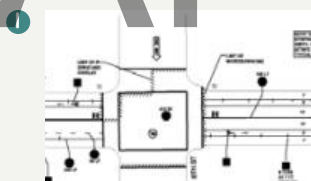
f 9th Street Restriping
Bike lane striping plan
January 2015



h Madison St Restriping
Bike lane striping plan
January 2015



j 20th St Restriping
Bike lane striping plan
September 2013



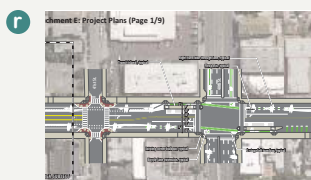
l Washington Restriping
Bike lane striping plan
June 2015



n Lakeside Green Streets
Lakeside Park Improvements
Streetscape & Bike Lanes
July 2014



p Safe Routes To Transit Underpass Improvements & Intersections around Lake Merritt BART Station



r Telegraph Avenue Complete Streets Street Redesign



t Clay Street Study
Road diet w/bike lanes
May 2015

scale comparisons

Oakland, CA



Philadelphia, PA





Barcelona, Spain

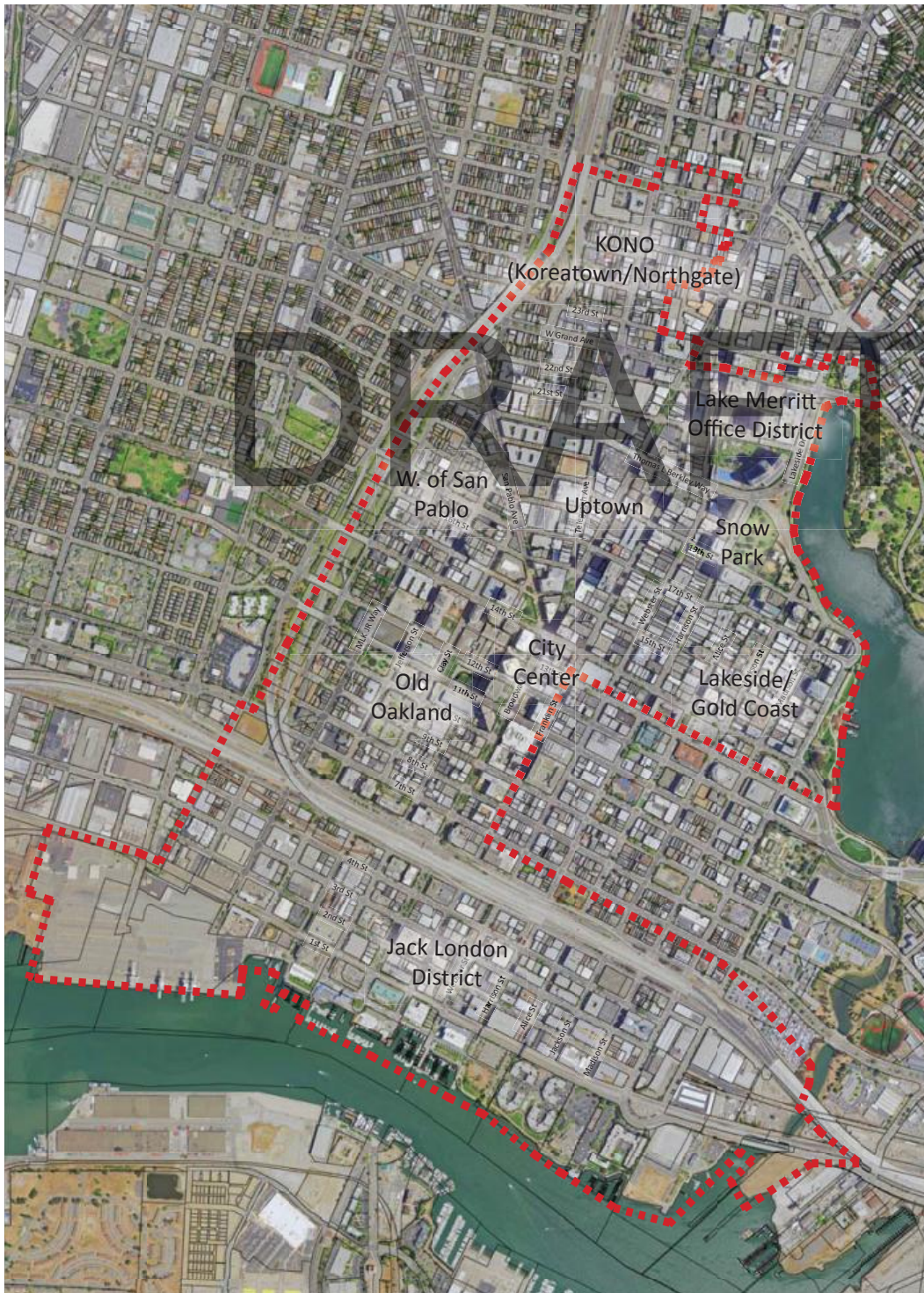


New Orleans, LA

neighborhoods downtown

While downtown Oakland is a singular destination, it includes several well-connected neighborhoods, with distinct character. The photoboard on the subsequent pages begin to illustrate the architecture and building types that line the streets of each of the character areas downtown.

This is a preliminary analysis of the areas that exist, including the 21st Street Neighborhood, the Warehouse/Arts Neighborhood, Uptown, City Center, Lakeside and Lakeside Park, West of San Pablo, Jack London Square and Old Oakland. During the creation of the Specific Plan these areas will evolve and adjust as plan ideas begin to take shape.

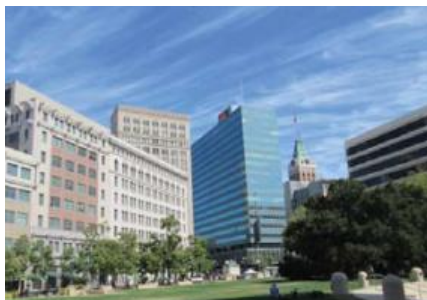


Left: Aerial view of downtown Oakland Specific Plan project area & initial map of existing neighborhoods.





CITY CENTER



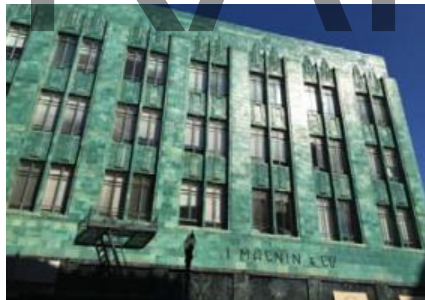
LAKE SIDE/
GOLD COAST

















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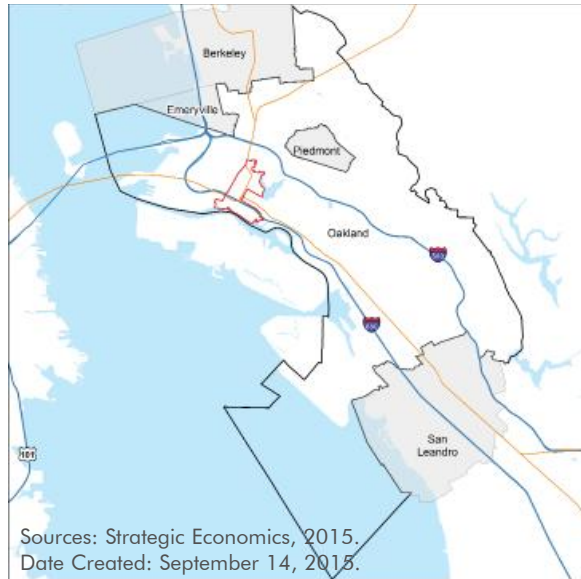
4

DEMOGRAPHIC, SOCIO-ECONOMIC AND MARKET CONDITIONS

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Demographic, Commute, and Employment Patterns

Figure 1. City of Oakland & Plan Area Boundaries



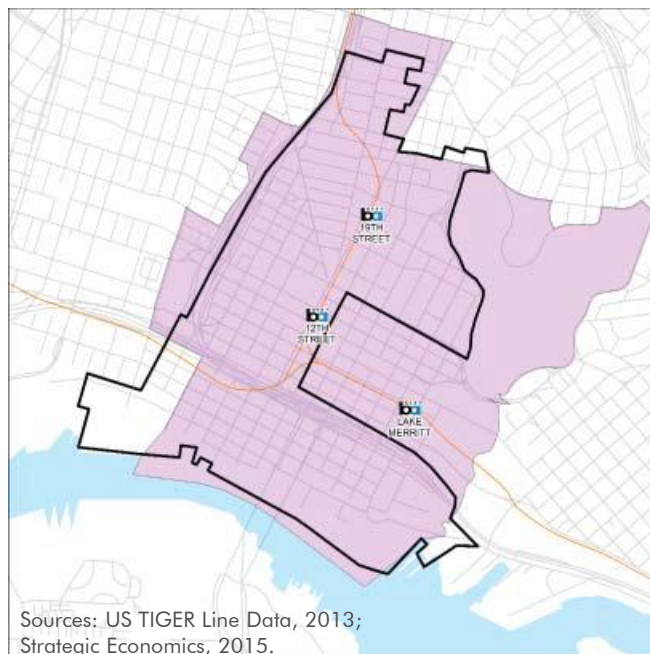
City and Plan Area Reference Map
 □ Oakland City Limits
 □ Downtown Oakland Specific Plan Area
 — BART Line

This section presents an overview of population and employment in downtown Oakland, with a focus on how the downtown has been changing over time. It discusses the role of the downtown within the city and the importance of the downtown as a regional employment center, providing context for the real estate market sections that follow.

As described in the previous section, due to U.S. Census data limitations, the population, household, and commute information presented below includes the Plan Area as well as Chinatown and a few blocks west of Highway 980 (see Figure 2). The term “Greater Downtown” is used to reflect this expanded geography. All U.S. Census data with a cited year of “2013” refers to 2009-2013 5-year estimates provided by the Census’ American Community Survey. These estimates – which provide significantly more detail than current decennial surveys – are designed by the Census to reflect the entire period from 2009 to 2013, rather than a specific year.

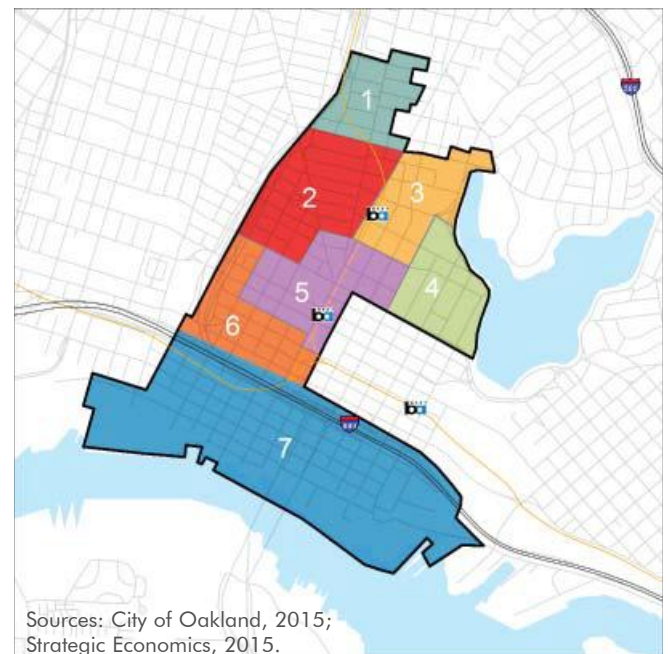
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Figure 2. “Greater Downtown” Area Corresponding to the 2013 U.S. Census Block Group Boundary



U.S. Census Block Groups Used for Analysis
 □ 2013 Block Group Boundary (Greater Downtown)
 □ Downtown Oakland Specific Plan Area
 — BART Line

Figure 3. Names and Boundaries of Subareas



City and Plan Area Reference Map
 1. Koreatown Northgate (KONO)
 2. Uptown
 3. Lake Merritt Office District
 4. Lakeside
 5. City Center Area
 6. Old Oakland
 7. Jack London District
 □ Downtown Oakland Specific Plan Area
 — BART Line

Population and Households

The Greater Downtown's population has increased tremendously as it has become a focus for new residential development. Between 1990 and 2000, the area's population increased 21 percent, compared with 7 percent growth in the city. Between 2000 and 2013, it increased by 23 percent, while the City's overall population declined by 0.6 percent. About 5 percent of the City's population lives in the Greater Downtown area. (Figure 4)

The Greater Downtown has higher proportions of younger adults and seniors compared to Oakland as a whole. Approximately 39 percent of residents are between 25 and 44 years old, compared to 33 percent in Oakland. Nearly 20 percent are seniors age 65 years and older, compared with 11.5 percent citywide. Overall, the median age in the Greater Downtown area is 42 years compared with 36 in Oakland. (Figure 5 and Figure 6)

Figure 4. Population and Households, 1990, 2000, 2013

	1990	2000	2013	1990-2000	Percent Change 2000-2013
Population					
Greater Downtown	14,166	17,192	21,145	21.4%	23.0%
Oakland	372,242	399,484	397,011	7.3%	-0.6%
Households					
Greater Downtown	7,437	9,038	11,832	21.5%	30.9%
Oakland	144,766	150,971	154,786	4.3%	2.5%

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

Figure 5. Median Age, 1990, 2000, 2013

	1990	2000	2013
Greater Downtown	n/a	41.5	41.8
Oakland	n/a	33.3	36.2

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.





Figure 6. Age Distribution, 1990, 2000, 2013

	Number			Percent		
	1990	2000	2013	1990	2000	2013
Greater Downtown						
Under 5 year	599	676	595	4.2%	3.9%	2.8%
5 to 9 years	435	666	397	3.1%	3.9%	1.9%
10 to 14 years	436	486	553	3.1%	2.8%	2.6%
15 to 17 years	293	277	140	2.1%	1.6%	0.7%
18 to 24 years	1,439	1,581	1,741	10.2%	9.2%	8.2%
25 to 34 years	2,851	3,123	4,661	20.1%	18.2%	22.0%
35 to 44 years	2,182	2,736	3,646	15.4%	15.9%	17.2%
45 to 54 years	1,240	2,377	2,741	8.8%	13.8%	13.0%
55 to 64 years	1,274	1,565	2,589	9.0%	9.1%	12.2%
65 to 74 years	1,603	1,685	1,544	11.3%	9.8%	7.3%
75 to 84 years	1,282	1,411	1,491	9.0%	8.2%	7.1%
85 years and over	532	609	1,047	3.8%	3.5%	5.0%
Total	14,166	17,192	21,145	100.0%	100.0%	100.0%
Oakland						
Under 5 year	29,973	28,292	25,837	8.1%	7.1%	6.5%
5 to 9 years	26,290	30,134	22,788	7.1%	7.5%	5.7%
10 to 14 years	23,150	26,502	22,094	6.2%	6.6%	5.6%
15 to 17 years	13,174	14,831	13,783	3.5%	3.7%	3.5%
18 to 24 years	39,400	38,791	37,135	10.6%	9.7%	9.4%
25 to 34 years	70,763	72,315	68,685	19.0%	18.1%	17.3%
35 to 44 years	64,002	63,310	62,635	17.2%	15.8%	15.8%
45 to 54 years	34,697	53,865	52,398	9.3%	13.5%	13.2%
55 to 64 years	25,938	29,656	46,402	7.0%	7.4%	11.7%
65 to 74 years	24,502	20,662	24,915	6.6%	5.2%	6.3%
75 to 84 years	15,050	15,145	12,992	4.0%	3.8%	3.3%
85 years and over	5,303	5,981	7,347	1.4%	1.5%	1.9%
Total	372,242	399,484	397,011	100.0%	100.0%	100.0%

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

The racial and ethnic composition of the Greater Downtown is very diverse, but reflects a citywide decline in African American residents. Since 1990, the African American population in the Greater Downtown has fallen in both numbers and share of total population. In 1990 African Americans accounted for 31.3% of the area, while in 2013 they accounted for only 20.4%, with the difference made up by increases in all other racial and ethnic groups. (Figure 7)

The Greater Downtown has a much larger share of single person households than Oakland as a whole. Approximately 60 percent of households in the Greater Downtown are single-person households, while only nine percent are families with children. In Oakland as a whole, 36 percent of households are single person households, and nearly 30 percent are families with children. The distribution of household types in the downtown has remained relatively steady since 1990, with a slight decline in families with children over the period. (Figure 9 and Figure 9)

Figure 7. Race and Ethnicity, 1990, 2000, 2013

	Number			Percent		
	1990	2000	2013	1990	2000	2013
Greater Downtown						
White, Non-Hispanic	3,078	2,849	4,955	21.7%	16.6%	23.4%
Black or African-American	4,432	4,910	4,308	31.3%	28.6%	20.4%
Asian or Pacific Islander	5,472	7,223	8,241	38.6%	42.0%	39.0%
Hispanic, Any Race	1,057	1,522	2,473	7.5%	8.9%	11.7%
All Other Races	127	688	1,168	0.9%	4.0%	5.5%
Total	14,166	17,192	21,145	100.0%	100.0%	100.0%
Oakland						
White, Non-Hispanic	105,203	93,953	103,603	28.3%	23.5%	26.1%
Black or African-American	159,465	140,139	105,362	42.8%	35.1%	26.5%
Asian or Pacific Islander	53,025	62,259	67,297	14.2%	15.6%	17.0%
Hispanic, Any Race	51,711	87,467	102,090	13.9%	21.9%	25.7%
All Other Races	2,838	15,666	18,659	0.8%	3.9%	4.7%
Total	372,242	399,484	397,011	100.0%	100.0%	100.0%

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

Figure 8. Distribution of Household Type, 1990, 2000, 2013

	Number			Percent		
	1990	2000	2013	1990	2000	2013
Greater Downtown						
Families with Children	947	1,193	1,029	12.8%	13.2%	8.7%
Families without Children	1,352	1,956	2,533	18.3%	21.6%	21.4%
Householder Living Alone	4,615	5,276	7,059	62.6%	58.4%	59.7%
Other Households	464	613	1,211	6.3%	6.8%	10.2%
Total	7,378	9,038	11,832	100.0%	100.0%	100.0%
Oakland						
Families with Children	46,716	44,253	44,807	32.3%	29.3%	28.9%
Families without Children	37,107	43,081	38,698	25.7%	28.5%	25.0%
Householder Living Alone	47,973	48,966	55,383	33.2%	32.4%	35.8%
Other Households	12,725	14,671	15,898	8.8%	9.7%	10.3%
Total	144,521	150,971	154,786	100.0%	100.0%	100.0%

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

The Greater Downtown has a greater proportion of households in the lower income brackets than Oakland as a whole, but incomes per capita are similar. Adjusted for inflation, the percent of households in the Greater Downtown earning less than \$20,000 per year has hovered around forty percent since 1990, compared with approximately 20 percent in Oakland (Figure 10). Overall, median household income in the Greater Downtown (\$32,297) remains significantly below Oakland as a whole (\$52,583) (Figure 11). However, incomes per person are essentially the same in Greater Downtown and the city as a whole, suggesting Greater Downtown's lower median income is driven by its smaller household sizes.

Recent years have seen an increase in the number of higher income households. Approximately 16 percent of Greater Downtown households earned more than \$100,000 per year in 2013, up from six percent in 1990 (inflation-adjusted to 2013 dollars). Higher income households tend to be concentrated in Jack London, which has experienced a significant amount of new residential development during the past two decades. (Figure 12)

Figure 9. Distribution of Household Size, 1990, 2000, 2013

	Number			Percent		
	1990	2000	2013	1990	2000	2013
Greater Downtown						
1 person	4,615	5,306	7,059	62.6%	58.8%	59.7%
2 persons	1,587	2,180	3,436	21.5%	24.1%	29.0%
3 persons	500	727	700	6.8%	8.1%	5.9%
4 persons	300	425	359	4.1%	4.7%	3.0%
5 persons	164	219	121	2.2%	2.4%	1.0%
6 persons	107	93	137	1.5%	1.0%	1.2%
7 or more persons	105	79	20	1.4%	0.9%	0.2%
Total	7,378	9,029	11,832	100.0%	100.0%	100.0%
Oakland						
1 person	47,973	48,952	55,383	33.2%	32.5%	35.8%
2 persons	41,417	42,872	46,071	28.7%	28.4%	29.8%
3 persons	22,239	22,504	23,080	15.4%	14.9%	14.9%
4 persons	15,868	16,571	15,920	11.0%	11.0%	10.3%
5 persons	8,133	9,300	6,994	5.6%	6.2%	4.5%
6 persons	4,180	4,863	3,966	2.9%	3.2%	2.6%
7 or more persons	4,711	5,728	3,372	3.3%	3.8%	2.2%
Total	144,521	150,790	154,786	100.0%	100.0%	100.0%

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

Figure 10. Distribution of Household Income, 1990, 2000, 2013 (2013 Dollars)

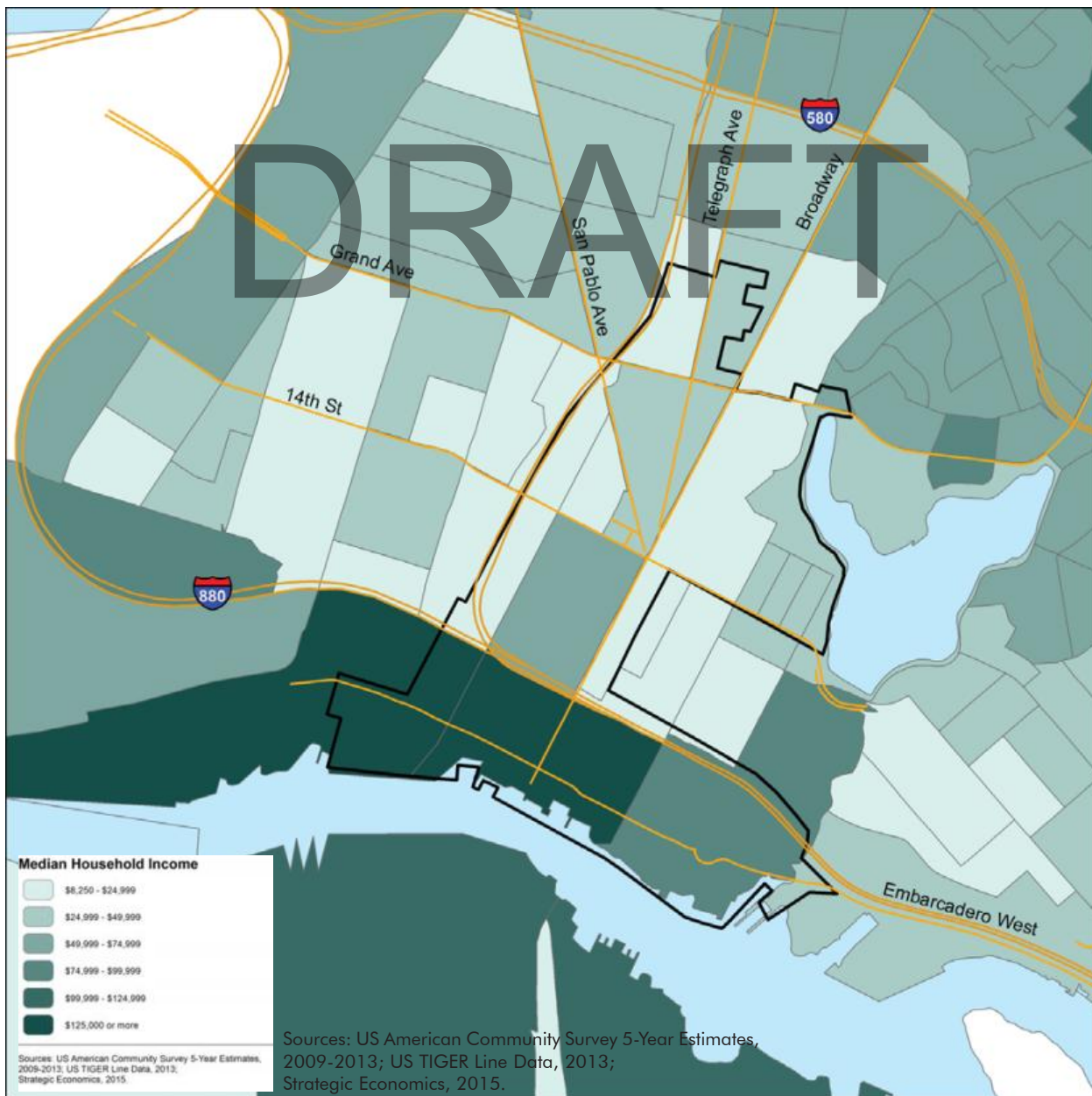
	Number			Percent		
	1990	2000	2013	1990	2000	2013
Greater Downtown						
Less than \$10,000	967	1,965	1,457	13%	22%	12%
\$10,000 to \$14,999	1,119	978	1,948	15%	11%	16%
\$15,000 to \$19,999	938	899	1,128	13%	10%	10%
\$20,000 to \$24,999	571	543	738	8%	6%	6%
\$25,000 to \$29,999	470	451	464	6%	5%	4%
\$30,000 to \$34,999	453	426	372	6%	5%	3%
\$35,000 to \$39,999	499	445	510	7%	5%	4%
\$40,000 to \$44,999	361	440	508	5%	5%	4%
\$45,000 to \$49,999	301	419	402	4%	5%	3%
\$50,000 to \$59,999	480	619	635	6%	7%	5%
\$60,000 to \$74,999	493	538	747	7%	6%	6%
\$75,000 to \$99,999	317	553	1,073	4%	6%	9%
\$100,000 to \$124,999	176	279	620	2%	3%	5%
\$125,000 to \$149,999	87	195	421	1%	2%	4%
\$150,000 or more	204	290	809	3%	3%	7%
Total	7,436	9,040	11,832	100%	100%	100%
Oakland						
Less than \$10,000	11,106	14,126	11,996	8%	9%	8%
\$10,000 to \$14,999	10,162	7,155	11,944	7%	5%	8%
\$15,000 to \$19,999	9,485	7,122	9,649	7%	5%	6%
\$20,000 to \$24,999	7,597	6,572	8,129	5%	4%	5%
\$25,000 to \$29,999	7,321	6,651	7,170	5%	4%	5%
\$30,000 to \$34,999	6,771	6,703	6,950	5%	4%	4%
\$35,000 to \$39,999	7,643	6,746	6,400	5%	4%	4%
\$40,000 to \$44,999	6,323	6,498	6,032	4%	4%	4%
\$45,000 to \$49,999	7,144	6,437	5,798	5%	4%	4%
\$50,000 to \$59,999	11,875	11,974	11,510	8%	8%	7%
\$60,000 to \$74,999	13,892	13,826	13,502	10%	9%	9%
\$75,000 to \$99,999	16,356	17,889	16,695	11%	12%	11%
\$100,000 to \$124,999	10,000	11,364	11,767	7%	8%	8%
\$125,000 to \$149,999	6,282	8,427	7,050	4%	6%	5%
\$150,000 or more	12,808	19,481	20,194	9%	13%	13%
Total	144,765	150,971	154,786	100%	100%	100%

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

Figure 11. Median Household and Per Capita Income, 1990, 2000, and 2013 (2013 Dollars)

	1990	2000	2013
Household Income			
Plan Area	\$26,018	\$26,142	\$32,297
Oakland	\$49,147	\$55,998	\$52,583
Per Capita Income			
Plan Area	\$25,063	\$23,232	\$31,902
Oakland	\$26,621	\$30,667	\$31,971

Figure 12. Median Households Income, 2013



Employment and Commute Patterns

The Plan Area and citywide employment estimates described in this section are primarily based on estimates provided by the California Employment Development Department (EDD); this data offers the greatest flexibility and descriptive detail, but comparable data is not readily available for locations outside the city. To paint a fuller picture, this section also cites employment data from the U.S. Census Longitudinal Employer-Household Dynamics dataset (LEHD) where needed.

The analysis focuses on a few simplified “industry groups”, which consist of groupings of standardized industry sectors under the “North American Industry Classification System” (NAICS):

Education and health services: Includes the industry sectors “educational services” and “health care and social assistance.” Jobs in this industry group are often concentrated in institutional settings.

Production, distribution, and repair (PDR): Includes the industry sectors “manufacturing,” “utilities,” “wholesale trade,” and “transportation and warehousing.” Jobs in these sectors are often located in industrial buildings or sites. However, the maps in this section indicate a high concentration of these jobs in downtown Oakland’s office districts, since businesses in these industries also require office space.

Office-based: Jobs in this industry group are typically white-collar professional jobs likely to be located in office space. Industry sectors include “information,” “finance and insurance,” “real estate rental and leasing,” “professional, scientific, and technical services,” and “management of companies and enterprises.”

Retail and entertainment: Includes the industry sectors “retail trade,” “arts, entertainment, and recreation,” and “accommodation and food services.” These jobs are most likely to be located in retail, dining, drinking, entertainment, and hotel establishments.

Public administration: These are separately-classified public sector jobs. These jobs can span a wide range of types, locations, and duties – from city budget oversight to street maintenance. However, in Downtown Oakland it is very likely that many of the jobs are office-based.

Other: Includes industry sectors related to natural resource extraction, agriculture, construction, temporary services, waste management, and other personal and professional services.



Employment and Commute Findings

Downtown Oakland is the largest and most densely concentrated employment center in the East Bay region, and one of the largest employment centers in the Bay Area. The broader downtown Oakland area – including the Broadway-Valdez, Chinatown, and areas near the Lake Merritt BART station – is estimated to contain nearly 84,000 jobs and to form the largest employment center in the East Bay;¹ Over 60 percent of these jobs are located with the Plan Area. Furthermore, downtown Oakland represents the largest and densest job concentration in the East Bay.² The

Plan Area's excellent freeway and transit access – and its location within the Bay Area's third most populous city – make it a key employment center for the entire region.

Estimates of employment in the Plan Area range between 50,000 and 55,000 jobs. The EDD estimates that the Plan Area contains approximately 52,000 jobs, which represents about 30 percent of the City's employment (Figure 13). Alternatively, the U.S. Census LEHD dataset estimates that the Plan Area contains 54,000 jobs. (See Figure 16 and Figure 20 for maps of employment density in Oakland and the Plan Area, respectively.)

¹ SPUR, "A Downtown for Everyone: Shaping the Future of Downtown Oakland," September 2015.

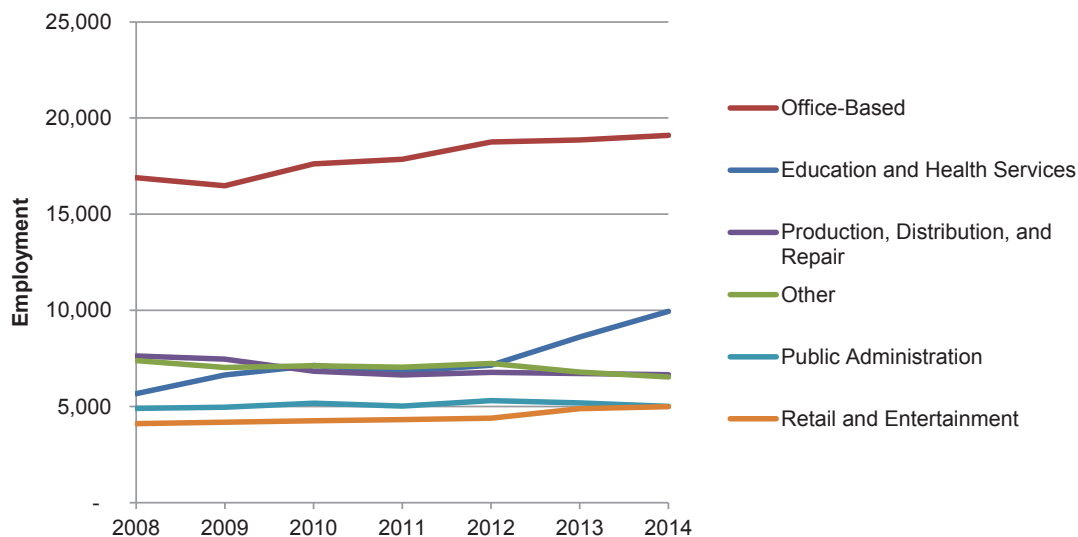
² East Bay Economic Development Alliance, "Building on Our Assets," 2011.

Figure 13. Employment by Industry Group, Plan Area and City, 2014

	City of Oakland		Plan Area		
	Employment	As % of Total	Employment	As % of Total	As % of City
Office-Based	27,710	16.1%	19,100	36.6%	68.9%
Education and Health Services	54,504	31.7%	9,954	19.1%	18.3%
Production, Distribution, and Repair	32,172	18.7%	6,648	12.7%	20.7%
Other	23,500	13.6%	6,537	12.5%	27.8%
Public Administration	6,985	4.1%	5,000	9.6%	71.6%
Retail and Entertainment	27,301	15.9%	4,991	9.6%	18.3%
Total	172,173	100.0%	52,229	100.0%	30.3%

Sources: California Employment Development Department, 2014; Strategic Economics, 2015.

Figure 14. Employment by Industry Group, Plan Area, 2008 to 2014



Sources: California Employment Development Department, 2014; Strategic Economics, 2015.

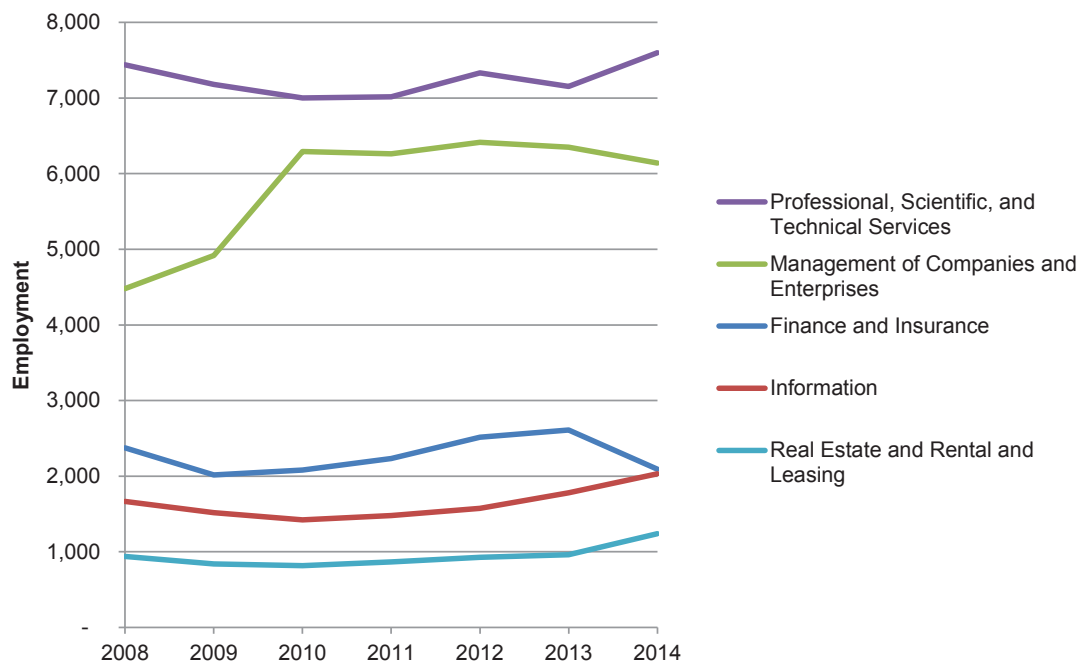
The Plan Area's total employment has grown significantly since 2008. According to the EDD, the number of jobs in the Plan Area increased from 46,569 in 2008 to 52,229 in 2014 (see Figure 14). This represents an average annual increase of 1.9% over the six-year period. While the city is experiencing steady job growth, it appears relatively low compared to the significant gains occurring in other parts of the region.

The highest shares of Plan Area jobs are in the office-based, education and health services, and PDR industry groups; however, the Plan Area excludes a significant concentration of immediately-adjacent public administration jobs. Jobs in the office-based industry group comprise nearly 37 percent of Plan Area jobs, since the Plan Area is a major professional office district. Over 19 percent of jobs are in the education and health fields, and nearly 13 percent in the PDR industry group. Nearly ten percent of jobs are in the public administration field (see Figure 13). A recent report by SPUR found a similar distribution of employment within its larger study area, except public administration jobs rose to the largest industry sector after including the large concentration of county and regional agency offices just southeast of the Plan Area.³

³ SPUR, "A Downtown for Everyone: Shaping the Future of Downtown Oakland," September 2015.

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Figure 15. Office-Based Industry Group Employment by Industry Sector, Plan Area, 2008 to 2014



Sources: California Employment Development Department, 2014; Strategic Economics, 2015.

Figure 16. Oakland Employment Density



Sources: CA EDD, 2014;
Strategic Economics, 2015.

Oakland Employment Density

Jobs per Square Mile

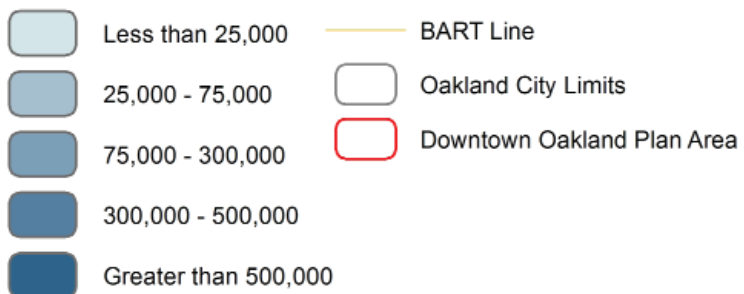
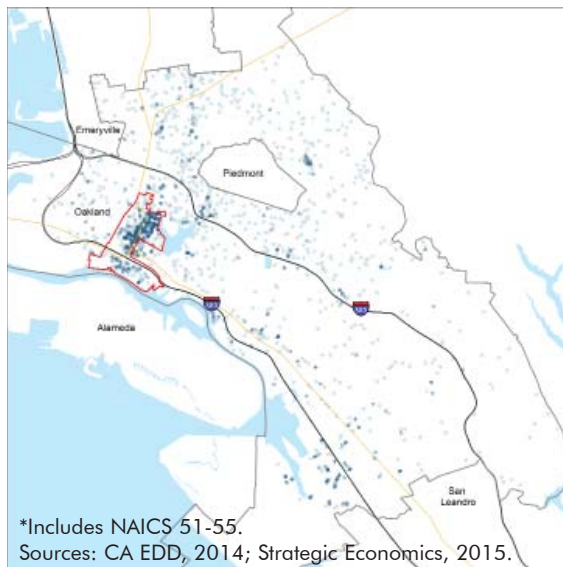
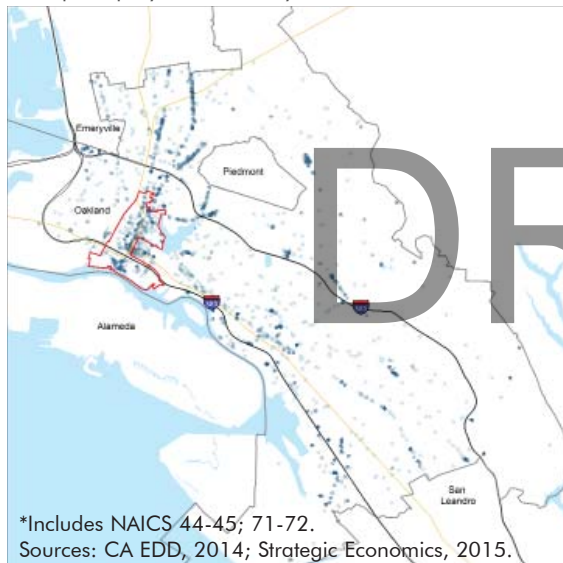


Figure 17. Oakland Office-Based Employment Density*



Employment in industry sectors comprising the office-based industry group has risen steadily in the Plan Area in recent years, fueled by growth in technology, information, and real estate firms. Jobs in office-based industries increased from a low of 16,472 during the recession in 2009 to 19,100 in 2014 (see Figure 14). This represents an average annual increase of 3.0% over this five-year period. As illustrated in Figure 15, the professional, scientific, and technical services sector, the information sector, and the real estate, rental, and leasing sectors are all growing. Office-based industry employment in the management and finance and insurance sectors has remained relatively flat in the last several years.

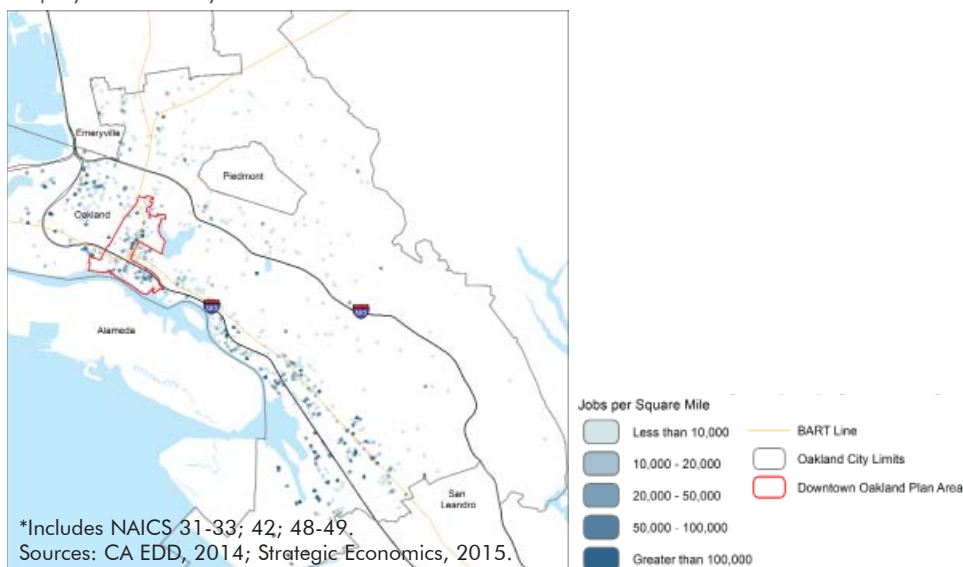
Figure 18. Oakland Retail and Entertainment Industry Group Employment Density*



With the recent relocation of the Oakland Unified School District offices to the Plan Area, education and health services represents the second largest industry category in the Plan Area. As shown in Figure 13, education and health services represents 19 percent of employment in the Plan Area. Education and health services are growth industries in both the Downtown and in Oakland as a whole.

While Oakland's PDR industry sectors are generally concentrated outside of the Plan Area, significant pockets of these industries exist within the Plan Area. As seen in Figure 23, nodes of PDR employment are present in the Jack London Square and Waterfront subarea, including the Oakland Produce Market and other wholesalers on the eastern end of the district.

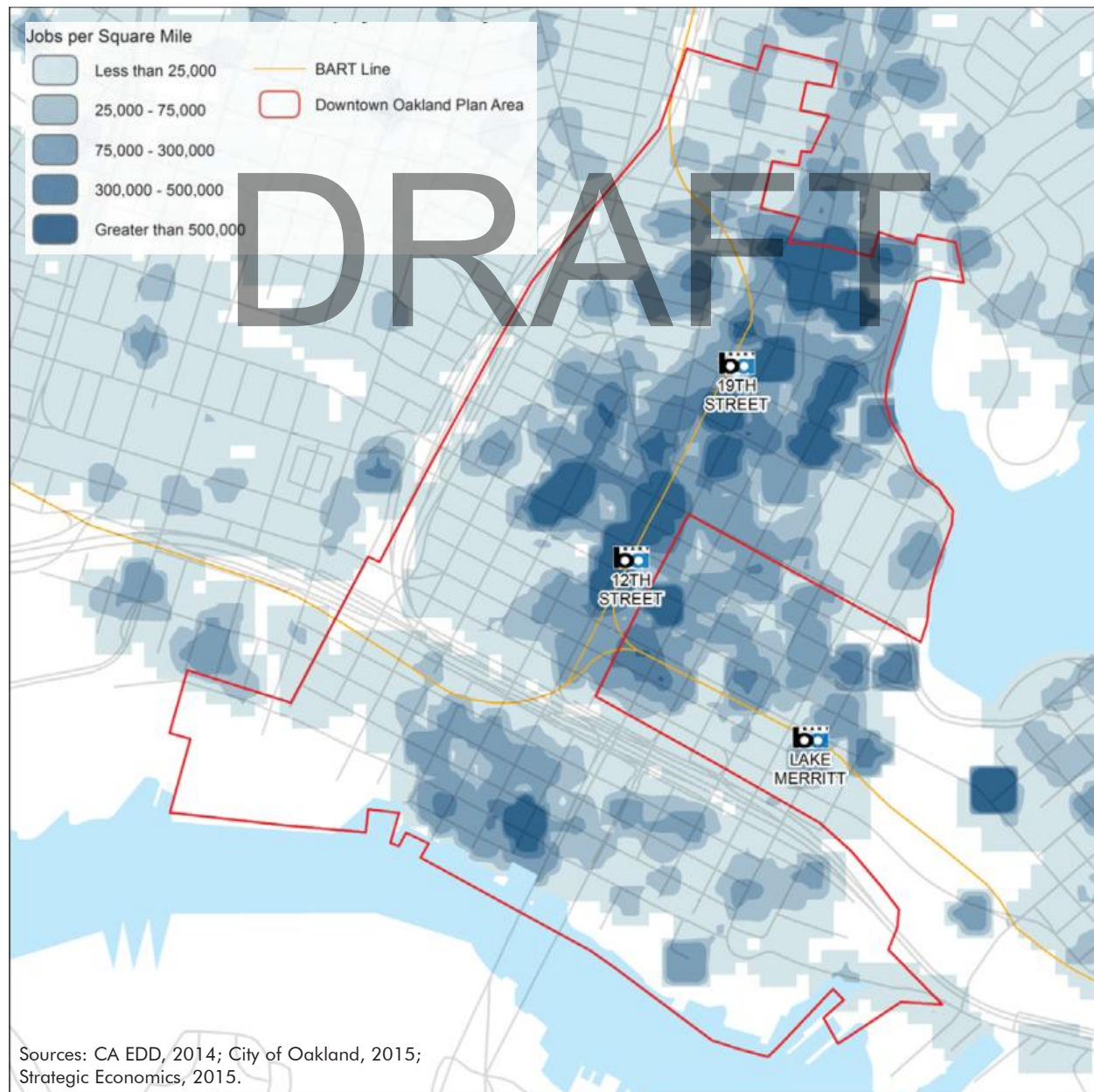
Figure 19. Oakland PDR Industry Group Employment Density*



Relative to Oakland overall, the Plan Area contains concentrations of employment in the office-based and public administration industry groups. As shown in Figure 13, office-based industries represent 69 percent of total office-based employment citywide. (See Figure 17 and Figure 21 for maps of office employment density in Oakland and the Plan Area, respectively.) Over 70 percent of citywide public administration employment is located in the Plan Area as well – much of it also likely office-based – reflecting Downtown Oakland’s function as a center of employment for agencies at the city, county, regional, state and federal levels.

The Plan Area draws workers living in communities along the I-80/880 corridor, San Francisco, and eastern Contra Costa County. See Figure 24 and Figure 26 for a map and table of commute patterns for Plan Area workers. Twenty percent of Plan Area workers are residents of Oakland, and 10 percent live in San Francisco. Weekday BART riders using the two stations in the Plan Area (12th Street City Center and 19th Street) typically travel between San Francisco’s and Oakland’s respective downtowns (see Figure 28). This reflects significant cross-commuting between these two residential and employment centers.

Figure 20. Downtown Oakland Plan Area Employment Density



Sources: CA EDD, 2014; City of Oakland, 2015; Strategic Economics, 2015.

Figure 21. Plan Area Office-Based Employment Density*

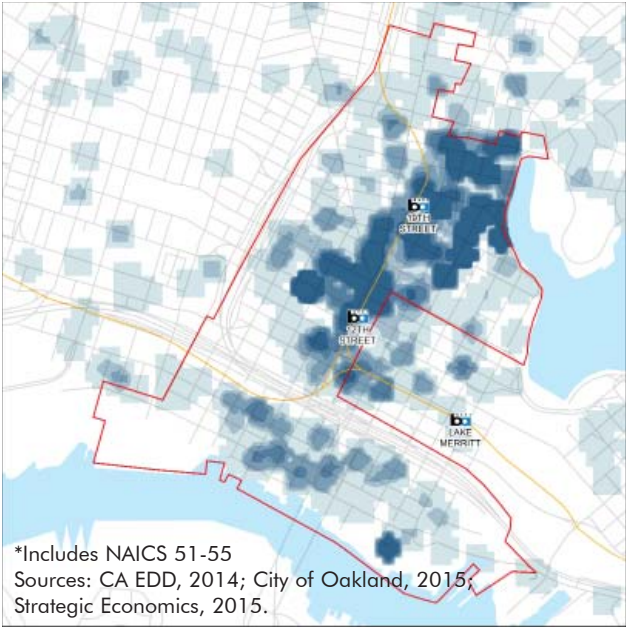


Figure 22. Plan Area Retail and Entertainment Industry Group Employment Density*

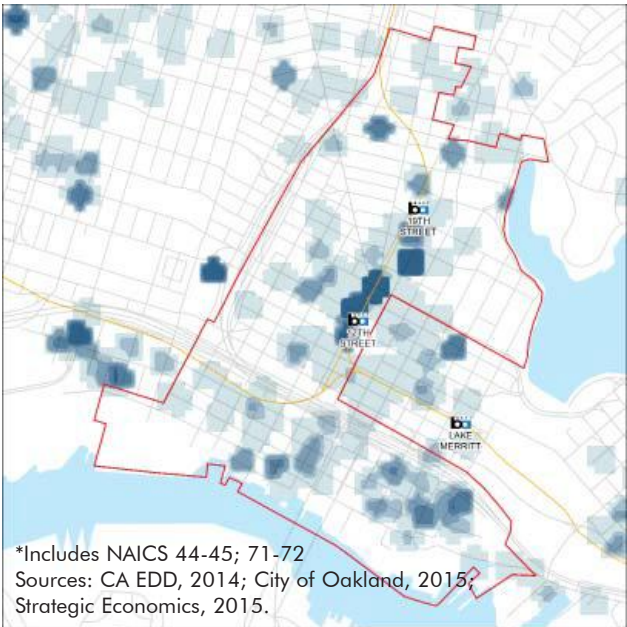
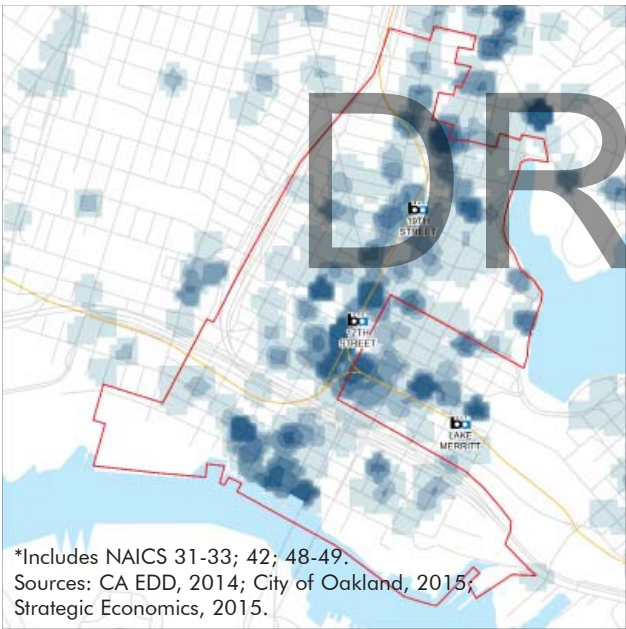


Figure 23. Plan Area PDR Industry Group Employment Density



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Major employment destinations for Plan Area residents include Downtown San Francisco, Downtown Oakland itself, Downtown Berkeley, and the University of California Berkeley. See Figure 25 and Figure 27 for a map and table of work locations for Plan Area residents. Plan Area residents are equally likely to work in Oakland and San Francisco: 24 percent of residents work in each city.

Figure 24. Home Locations for Plan Area Workers

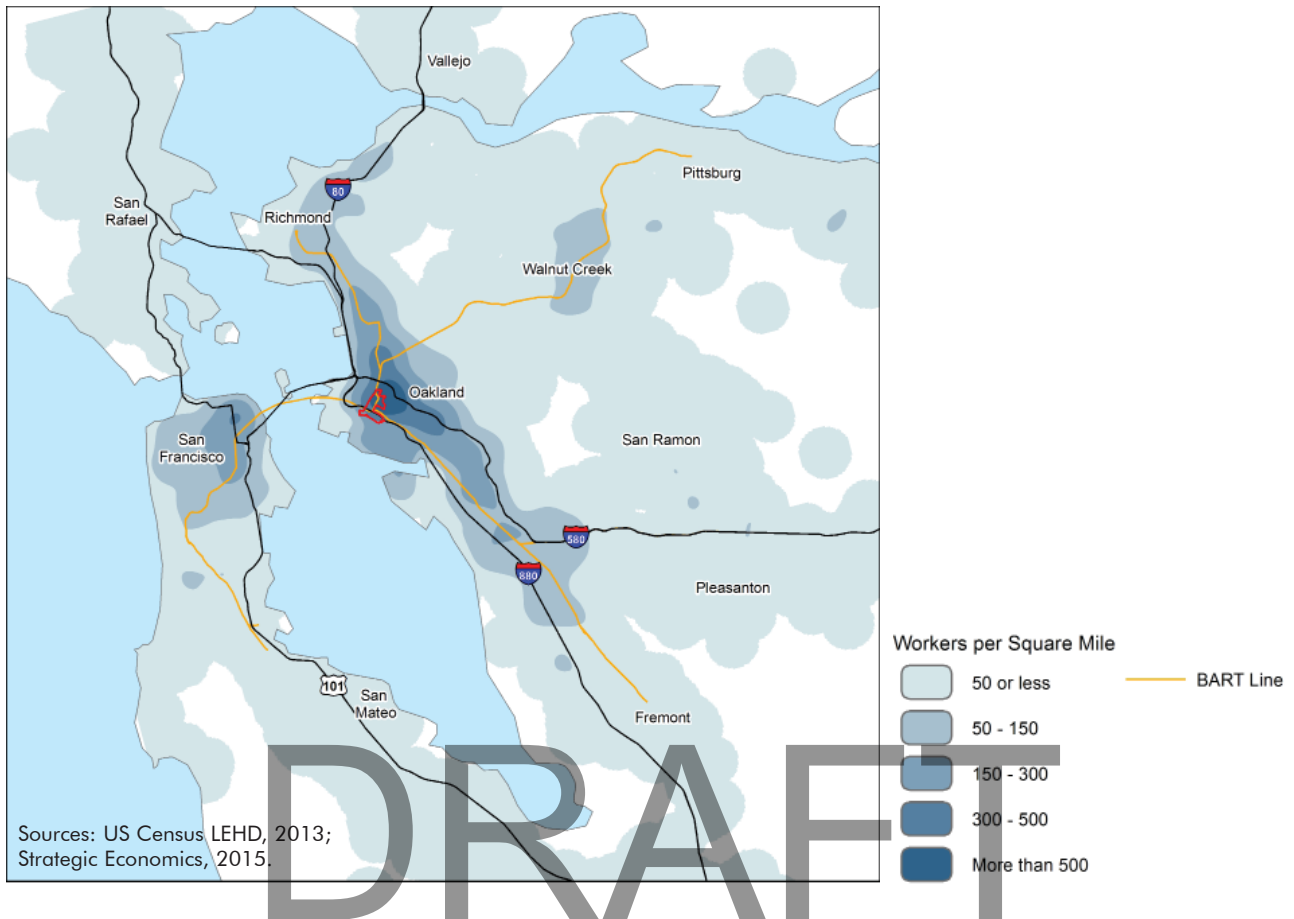


Figure 25. Work Locations for Plan Area Residents

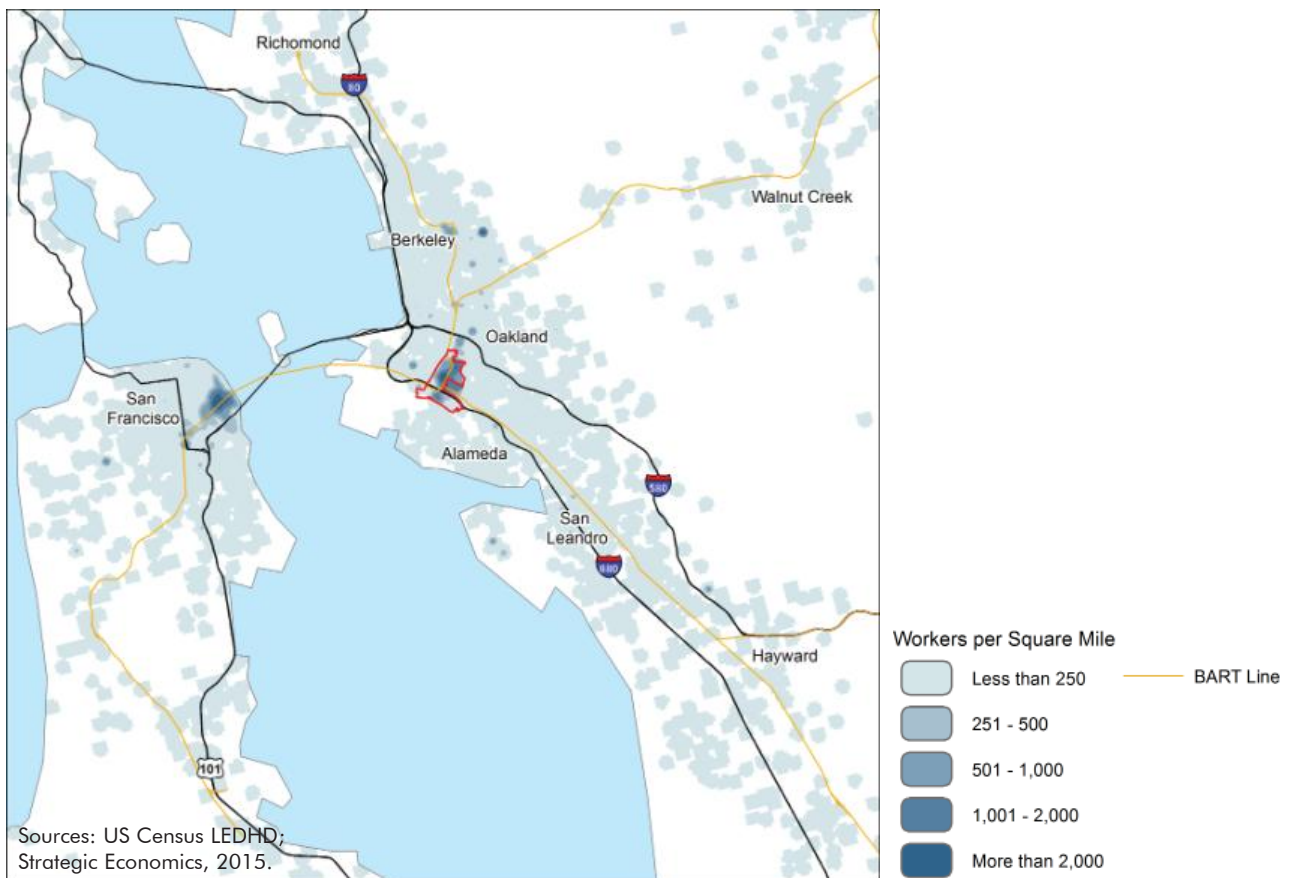


Figure 26. Top Ten Home Locations for Plan Area Workers, 2013

Place of Residence	Percent of Total
Oakland	19.8%
San Francisco	9.9%
Alameda	3.5%
Berkeley	3.0%
San Leandro	2.8%
San Jose	2.7%
Hayward	2.5%
Richmond	2.0%
Castro Valley	1.9%
Concord	1.7%

U.S. Census LEHD, 2013; Strategic Economics, 2015.

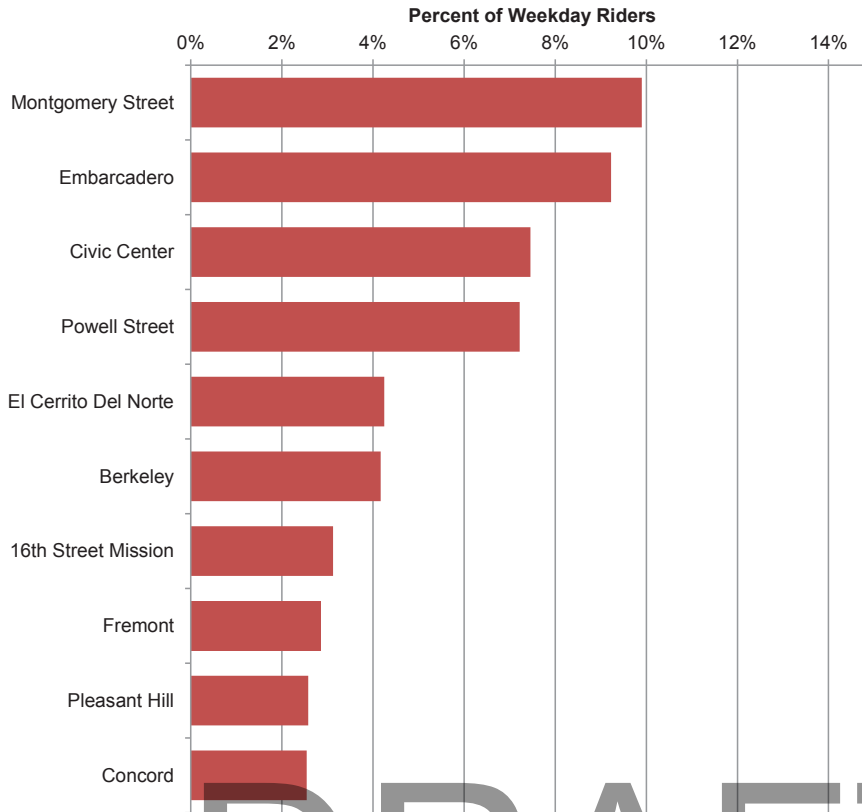
Figure 27. Top Ten Work Locations for Plan Area Residents, 2013

Place of Residence	Percent of Total
San Francisco	23.9%
Oakland	23.5%
Berkeley	5.6%
San Jose	2.5%
Los Angeles	1.9%
Alameda	1.8%
Sacramento	1.7%
Hayward	1.5%
Emeryville	1.4%
San Leandro	1.3%

U.S. Census LEHD, 2013; Strategic Economics, 2015.

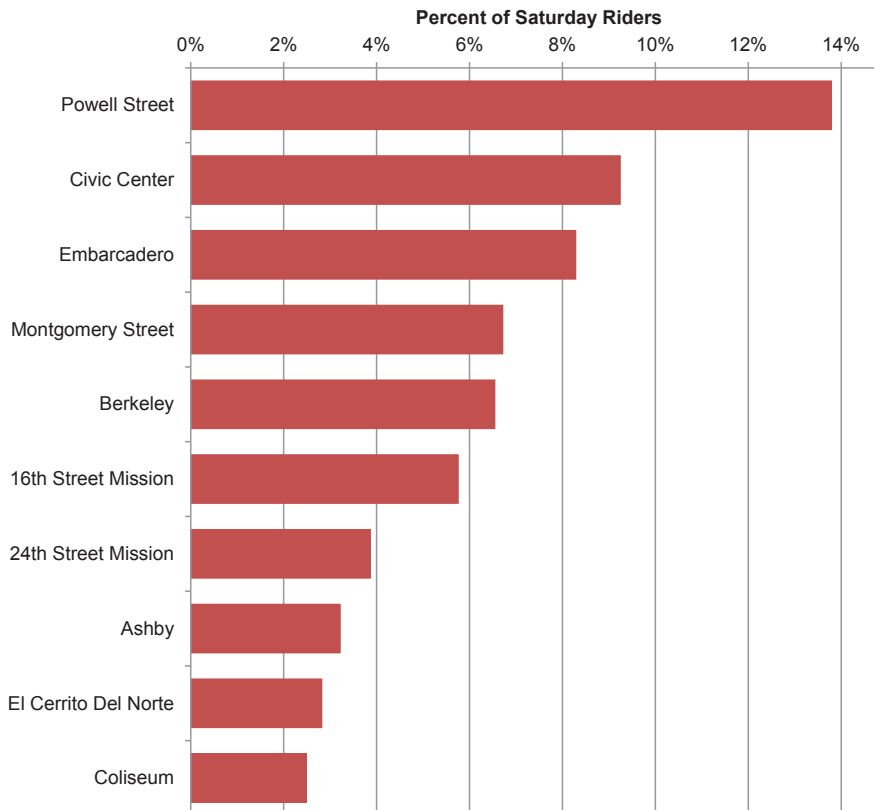


Figure 28. Weekday BART Ridership: Top Ten Origins of Riders Arriving in the Plan Area*, January to June, 2015



* Includes arrivals at 12th Street City Center and 19th Street BART Stations
 Sources: Bay Area Rapid Transit, 2015; Strategic Economics, 2015.

Figure 29. Saturday BART Ridership: Top Ten Origins of Riders Arriving in the Plan Area*, January to June, 2015



* Includes arrivals at 12th Street City Center and 19th Street BART Stations
 Sources: Bay Area Rapid Transit, 2015; Strategic Economics, 2015.

Housing Market Conditions

This section provides an overview of existing housing supply and development trends in the Plan Area. It also provides data regarding rents and sales prices, as well as observations about the feasibility of additional new housing development.

Existing Housing Stock

Downtown Oakland includes a diverse mix of housing, with the character of housing varying widely by location within the Plan Area. Older housing stock is found in the traditionally residential neighborhoods, including largely pre-war single-family detached homes in Old Oakland and multifamily buildings in the Lakeside area (also known as the Gold Coast). More recently, the Uptown and Jack London areas have been redeveloped with contemporary, mid-rise and high-rise multifamily buildings. A number of legacy industrial and commercial buildings in Koreatown Northgate and Jack London Square have been adapted to loft-style condominiums and apartments.

Downtown area, most in multi-family buildings.

About 95 percent of housing units are in buildings with two or more units, and 79 percent are in buildings with at least 20 units (Figure 30). Only 5 percent of units are in single family buildings, many located along the edge of Interstate 980.

The majority of units in the Greater Downtown

About 13,000 housing units are in the Greater

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Figure 30. Housing Units by Building Type, Plan Area and Oakland, 2013

	Greater Downtown		Oakland	
	Units	% of Total	Units	% of Total
Single-Family:	561	4.2%	80,649	47.2%
<i>Detached</i>	357	2.7%	73,590	43.0%
<i>Attached</i>	204	1.5%	7,059	4.1%
Multi-Family:	12,681	95.3%	89,737	52.5%
<i>2-4 Units</i>	787	5.9%	32,249	18.9%
<i>5-19 Units</i>	1,395	10.5%	25,284	14.8%
<i>20-49 Units</i>	3,008	22.6%	16,484	9.6%
<i>50+ Units</i>	7,491	56.3%	15,720	9.2%
Other	67	0.5%	591	0.3%
Total	13,309	100%	170,977	100%

Sources: US Census, 1990, 2000; US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

are occupied by renters; however, recent residential development has boosted the number of owner-occupied units. Approximately 85 percent of units in the Greater Downtown are renter-occupied, compared to 60 percent citywide. However, the number of owner-occupied units in the Greater Downtown has been increasing, growing from nine percent of the occupied housing stock in 1990 to 15 percent as of 2013. (Figure 31)

area's housing stock was built since 2000. The US Census estimates that 24 percent of the Plan Area's housing stock was built since 2000, virtually all during the years leading up to the Great Recession. These estimates do not include housing projects that have recently been completed. (Figure 32)

About one-quarter of the Greater Downtown

Figure 31. Household Tenure

	1990	2000	2013	% of Total		
	1990	2000	2013	1990	2000	2013
Greater Downtown						
Renter Occupied	6,692	7,971	10,001	91%	88%	85%
Owner Occupied	641	1,058	1,831	9%	12%	15%
Total	7,333	9,029	11,832	100%	100%	100%
Oakland						
Renter Occupied	84,302	88,301	92,248	58%	59%	60%
Owner Occupied	60,219	62,489	62,538	42%	41%	40%
Total	144,521	150,790	154,786	100%	100%	100%

Sources: US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

Figure 32. Housing Units by Year Built

	Greater Downtown		Oakland	
	Units	% of Total	Units	% of Total
Built 2010 Or Later	52	0.4%	334	0.2%
Built 2000 To 2009	3,195	24.0%	10,507	6.1%
Built 1990 To 1999	872	6.6%	8,265	4.8%
Built 1980 To 1989	893	6.7%	8,413	4.9%
Built 1970 To 1979	1,672	12.6%	16,169	9.5%
Built 1960 To 1969	897	6.7%	20,071	11.7%
Built 1950 To 1959	866	6.5%	20,264	11.9%
Built 1940 To 1949	561	4.2%	19,882	11.6%
Built 1939 Or Earlier	4,301	32.3%	67,072	39.2%
Total	13,309	100.0%	170,977	100.0%

Sources: US American Community Survey 5-Year Estimates, 2009-2013; Social Explorer, 2015; Strategic Economics, 2015.

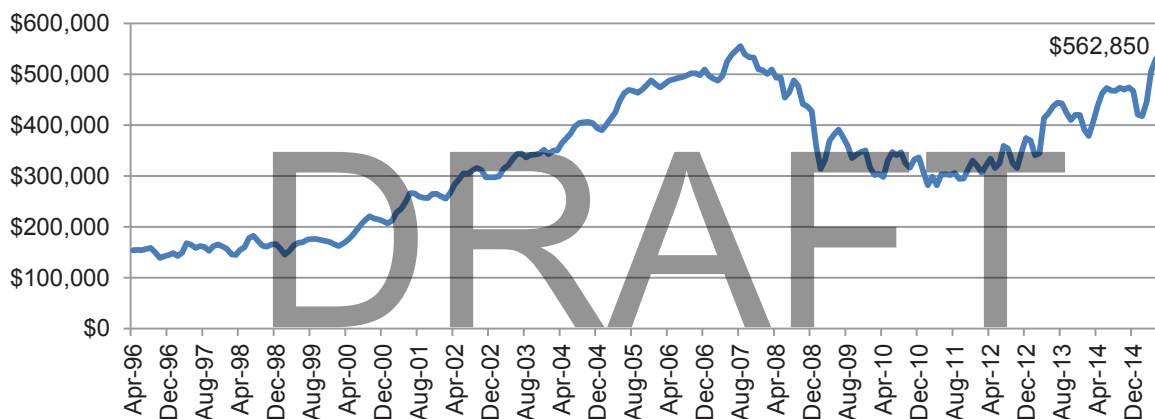
Rents, Home Prices and Affordability

Ownership housing values in Oakland (citywide) have completely recovered to their pre-recession peaks. As shown in Figure 33, the median home sales price in the City of Oakland reached \$562,850 in July 2015, recovering all of the value lost during the Great Recession. On a square foot basis, median sales prices for condominiums have outpaced single family homes in recent years, reaching \$499 per square foot (see Figure 34).

Rents have risen dramatically in both the City of Oakland and the Plan Area since 2010. As shown in Figure 36, the average monthly rent for units in the Plan Area stands at \$2,778 in 2015, an increase of 76 percent from 2010.¹ Oakland as a whole has seen a similar increase of 84 percent since 2010. As shown, recently built apartments in the Plan Area command a premium of approximately \$300 over the average rent in the city, but the growth trend has been similar.

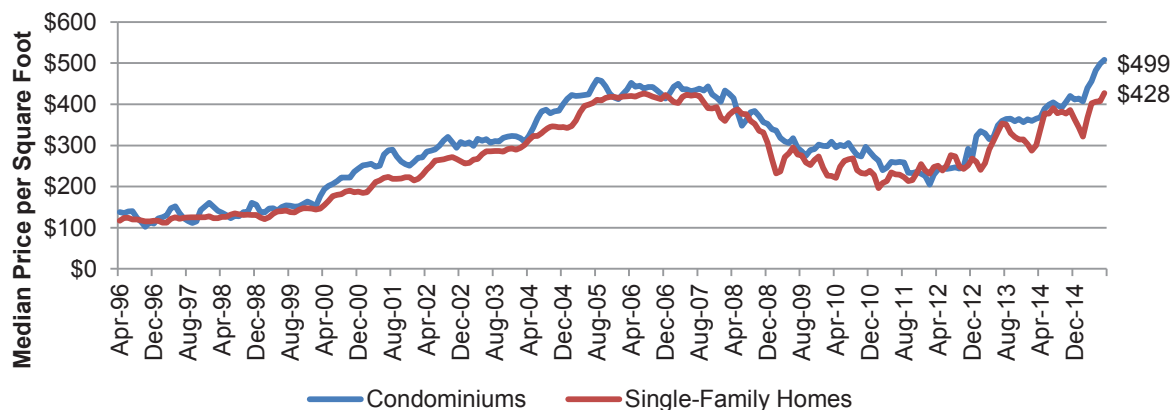
¹ Note that this data from RealAnswers only includes buildings over 50 units.

Figure 33. Monthly Median Home Sales Prices, All Housing Types, City of Oakland, April 1996 to July 2015 (nominal dollars)



Sources: Zillow, 2015; Strategic Economics, 2015.

Figure 34. Monthly Median Condominium and Single-Family Home Sales Prices per Square Foot, City of Oakland, April 1996 to July 2015 (nominal dollars)



Sources: Zillow, 2015; Strategic Economics, 2015.

Rising housing costs are contributing to a serious affordability crisis. The 2015 report “A Roadmap Toward Equity: Housing Solutions for Oakland, California” – written by PolicyLink in conjunction with the City of Oakland – outlined the extent of current, growing affordable housing challenges citywide. As cited in the report, a household earning the citywide median income would already need to spend 48 percent of its income to pay the median rent, or 61 to 67 percent of its income to pay a mortgage for the median home

value. Housing prices have long outpaced income increases in Oakland, making it all the more challenging to meet the city’s Regional Housing Needs Allocation (RHNA)² for moderate and below-moderate income households (Figure 37).

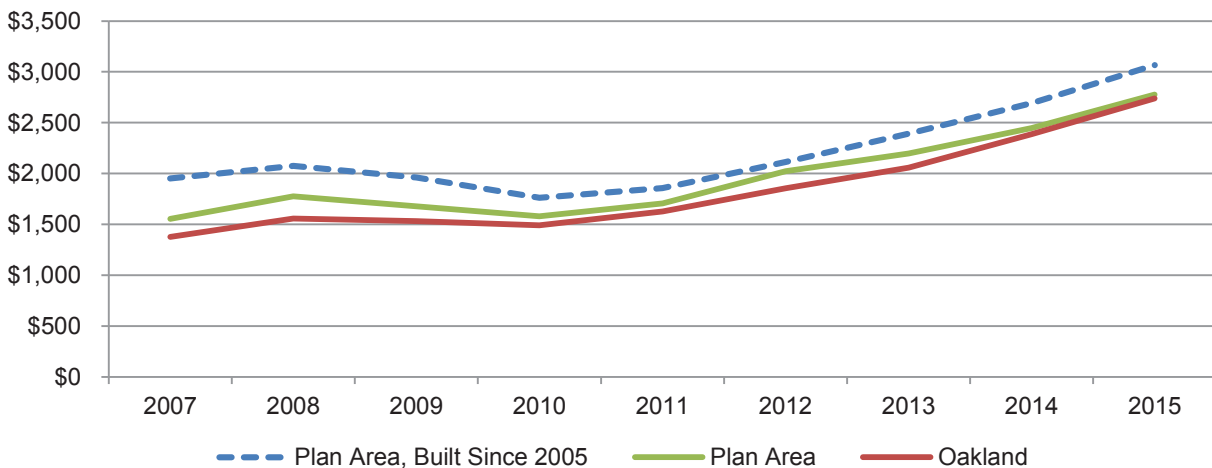
² RHNA is the quantification of each California jurisdiction’s share of regional housing need, based on the legal requirement that each jurisdiction meet projected household growth of all income levels by the end of its General Plan Housing Element’s statutory planning period.

Figure 35. Average Asking Rental Rates and Occupancy in Plan Area, Oakland, and Surrounding Communities, Second Quarter of 2015 (nominal dollars)

	Avg. Rent	Avg. Sq. Ft.	Avg. Rent/Sq. Ft.	Avg. Occupancy
Berkeley	\$3,018	703	\$4.29	94.4%
Emeryville	\$2,719	844	\$3.22	91.1%
Oakland	\$2,807	852	\$3.29	97.4%
Plan Area	\$2,853	850	\$3.36	96.4%
Plan Area: Built Since 2005	\$3,085	884	\$3.49	95.6%

Properties with 50 or more units. Occupancy rate for Plan Area is 2014 annual data.
Sources: Real Answers, 2015; Strategic Economics, 2015.

Figure 36. Monthly Rent per Unit, 2007 to 2015 (nominal dollars)



Sources: Real Answers, 2015; Strategic Economics, 2015.

Figure 37. Regional Housing Needs Assessment for the City of Oakland, 2015-2023

Total Units	Extremely Low-Income (30% AMI)	Very Low-Income (50% AMI)	Low-Income (80% AMI)	Moderate-Income (120% AMI)	Above Moderate-Income
14,765	1,029	1,030	2,075	2,815	7,816

Sources: City of Oakland General Plan Housing Amendment, 2014; Strategic Economics, 2015.

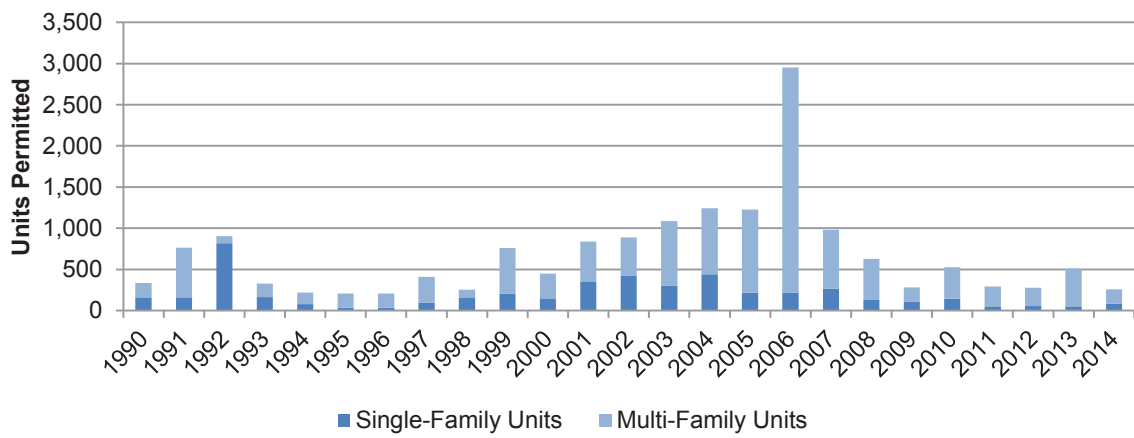
Housing Growth and Development Trends

Housing permitting activity in Oakland has remained relatively low since the Great Recession, with developers remaining focused on the backlog of planned projects. As shown in Figure 38, permits granted for new housing units in the City of Oakland peaked at 2,950 in 2006, prior to the national housing crisis and recession of 2008-2009. Post-recession permits for new projects remain at far lower levels.

Recent development in Uptown has intensified developer interest in building residential projects in the area. Figure 40 and Figure 42 show major development projects in the Plan Area over the last ten years. The completion of Phase I of the Uptown apartments, near Telegraph Avenue between 19th and 20th Streets, added about 650 new units of housing to the Uptown district and served as a catalyst for further development in the district. Three major multi-family residential projects are currently under construction in the Uptown subarea, and ten more are approved or proposed (Figure 41 and Figure 43). Several large residential projects are also proposed for the Broadway/Valdez District just north of the Plan Area.

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Figure 38. Oakland Housing Unit Permits by Type of Structure



Sources: US Department of Housing and Urban Development, State of the Cities Data Systems, 2015; Strategic Economics, 2015.

Figure 39. Residential Permits in Oakland and the 6-County Area

	Oakland		6 County Area	
	Single-Family Units	Multi-Family Units	Single-Family Units	Multi-Family Units
1990	161	175	7,678	7,007
1991	161	601	6,641	6,191
1992	816	89	8,049	3,828
1993	164	164	7,205	3,732
1994	78	138	9,049	4,057
1995	36	169	8,677	3,320
1996	33	175	11,031	6,592
1997	98	311	13,015	8,932
1998	158	96	12,594	10,147
1999	203	557	13,839	8,243
2000	148	301	11,758	9,994
2001	346	490	8,554	8,511
2002	420	469	10,751	6,267
2003	304	781	11,151	10,683
2004	440	800	10,661	9,958
2005	217	1,008	10,435	10,061
2006	213	2,737	8,021	12,582
2007	265	716	6,978	7,744
2008	127	501	3,298	7,728
2009	105	176	2,873	1,731
2010	144	380	2,932	5,821
2011	41	249	2,893	5,955
2012	54	221	4,555	10,099
2013	52	457	5,388	13,155
2014	81	176	5,472	14,461
Total	4,865	11,937	203,498	196,799
Annual Average	195	477	8,140	7,872
% of Total	29%	71%	51%	49%

Sources: US Department of Housing and Urban Development, State of the Cities Data Systems, 2015.

Figure 40. Major Housing Projects, Plan Area, Completed 2005 to 2015

Project	Address	Completed	Total Units	Affordable or Senior Units	Commercial (SF)
Koreatown Northgate					
The Telegraph	2401 Telegraph	2005	45		5,300
Total Koreatown Northgate			45	-	5,300
Uptown					
1511 Jefferson	1511 Jefferson St	2007	78		
The Uptown Apts - Phase I	1911 Telegraph Avenue	2007	665	166	
Fox Courts	555 19th Street	2009	80	80	2,500
630 Thomas Berkley Square Housing	630 Thomas L. Berkley Way	2009	88		6,000
C.L. Dellums - Rehab	644 14th Street	2013	73	73	
James Lee Court	690 15th Street	2013	26	26	
The Savoy - Rehab	1424 Jefferson Street	2014	101	100	
Cathedral Gardens	628 21st Street	2014	100	100	
Total Uptown			1,211	545	8,500
Lake Merritt Office District					
Lake Merritt Lodge	2322 Harrison Avenue	2014	92	92	
Total Lake Merritt Office District			92	92	-
Lakeside					
Madison Lofts	160 14th St.	2009	76		2,666
Total Lakeside			76	-	2,666
City Center Area					
Franklin 88 - Chinatown	989 Franklin	2005	88		6,000
Preservation Park III	655 12th St	2006	92		
Domain by Alta	1307 Jefferson Street	2011	252		3,000
Harrison Street Sr Housing	1633 Harrison	2012	73	73	
Total City Center Area			505	73	9,000
Old Oakland					
Market Square I	801-27 Clay Street	2006	116		11,000
418 7th Street	418 7th Street	2008	42		
Market Square II	859 Clay Street	2008	86		14,000
901 Jefferson	901 & 907 Jefferson St	2008	75		1,030
Madrone Hotel - Rehab	477 8th Street	2013	32	32	
Total Old Oakland			351	32	26,030

(Figure continued next page)

Figure 40 (Continued from previous page)

Project	Address	Completed	Total Units	Affordable or Senior Units	Commercial (SF)
Jack London District					
Aqua Via	121 2nd Street	2006	150		5,190
Wheelink Project	428 Alice St	2006	94		9,800
206 Second Street	206 Second St	2007	75		1,310
288 Third Street (formally 300 Harrison Street)	300 Harrison St	2007	91		
The Ellington (formerly 3rd/Broadway Mixed Use)	200, 210 & 228 Broadway	2008	134		11,000
8 Orchids	620 - 636 Broadway	2008	157		3,600
Jackson Courtyard Condominiums	210 Jackson St	2009	45		
311 2nd St	311 2nd St	2009	105		
116 6th St	116 6th Street 609 6th Street	2012	70	70	
Merritt Crossings	609 Oak Street	2012	70	70	
Total Jack London District			991	140	30,900
Total All Subareas			3,271	882	82,396

Lists projects with 25 or more units.

Sources: City of Oakland, 2015; Strategic Economics, 2015.



The Jack London District continues to be a focus for large housing projects. As shown in Figure 40, ten new housing projects have been completed in the Jack London District in the last ten years, in scattered sites east of Broadway. The Jack London District continues to be an area of interest for housing developers, with Ellis Partners seeking to construct two residential towers along Embarcadero.

The City Center subarea was a major focus of housing development in recent years, but currently proposed projects seek to construct office space. As seen in Figure 42, several residential projects were recently completed along Jefferson Street in an area west of City Center. Currently proposed development in City Center includes over 1 million square feet of office space, including one development revised from a residential project proposal to an office tower in response to changing market conditions (Figure 50).



Figure 41. Major Housing Projects Under Construction, Proposed, and Approved, Plan Area

Project	Address	Status	Total Units	Affordable or Senior Units	Commercial (SF)
Koreatown Northgate					
2538 Telegraph Ave	2538 Telegraph Ave/ 437 26th St	Approved	97		9,000
459 23rd Street	459 23rd St	Proposed	114		3,000
Total Koreatown Northgate			211	-	12,000
Uptown					
1701 MLK Way	1701 MLK Way	Construction	26	26	
Cathedral Gardens	2126 M L King Jr. Way, 616 and 620 21st St	Construction	100	100	
1431 Jefferson Street	1417-1431 Jefferson St	Approved	54		3,000
528 Berkley Way	528 Thomas L. Berkley Way	Proposed	25		
632 14th Street	632 14th Street	Proposed	40	40	
1800 San Pablo	1800 San Pablo	Proposed	200		25,000

(Figure continued next page)

Recent studies and developer input demonstrate that additional housing development is currently feasible in the Plan Area, particularly projects under seven stories. The late-2013 study “Downtown Oakland Development Feasibility Study” – prepared by AECOM for the City of Oakland the Metropolitan Transportation Commission – found that development of additional housing was already financially feasible in Downtown at that time, based on rents of \$3

to \$3.30 per square foot. “Type V” wood frame buildings (below seven stories) were found to be feasible, while “Type I” concrete/steel high rise buildings were feasible in the strongest market locations (such as Uptown). Despite increasing construction costs since that time, developers interviewed for this study noted that Type V projects are still feasible throughout the Plan Area, especially with current average rents of \$3.49 per square foot at newer projects, up to \$3.75 maximum.

Figure 41 (Continued from previous page)

Project	Address	Status	Total Units	Affordable or Senior Units	Commercial (SF)
Telegraph Plaza	2100 Telegraph Avenue	Proposed	150		
The Jefferson	612 18th St	Proposed	84		
495 22nd Street	495 22nd St	Proposed	81		6,000
Total Uptown			760	166	34,000
Lake Merritt Office District					
1900 Broadway	1900 Broadway	Proposed	294		11,000
Total Lake Merritt Office District			294	-	11,000
Lakeside					
Alice & 14th	250 14th Street	Proposed	90		
Alice & 17th	Alice Street @ 17th St	Proposed	150		
Emerald Views	222 19th St	Proposed	370		933
Total Lakeside			610	-	933
City Center					
1640 Broadway Mixed Use Project	1640 Broadway	Approved	254		4,710
Total City Center			254	-	4,710
Old Oakland					
459 8th Street	459 8th St	Proposed	50		4,000
Total Old Oakland			50	-	4,000
Jack London District					
377 2nd Street	377 2nd St	Approved	96		
201 Broadway	201 Broadway	Proposed	48		
Cost Plus Site	200 Fourth Street	Proposed	330		
Jack London Square	Broadway & 3rd	Proposed	260		
Jack London Square	Webster & 3rd	Proposed	400		
Total Jack London			1,134	-	-
Total All Subareas			3,313	-	17,420

Figure 42. Major Housing Projects, Completed 2005 to 2015.

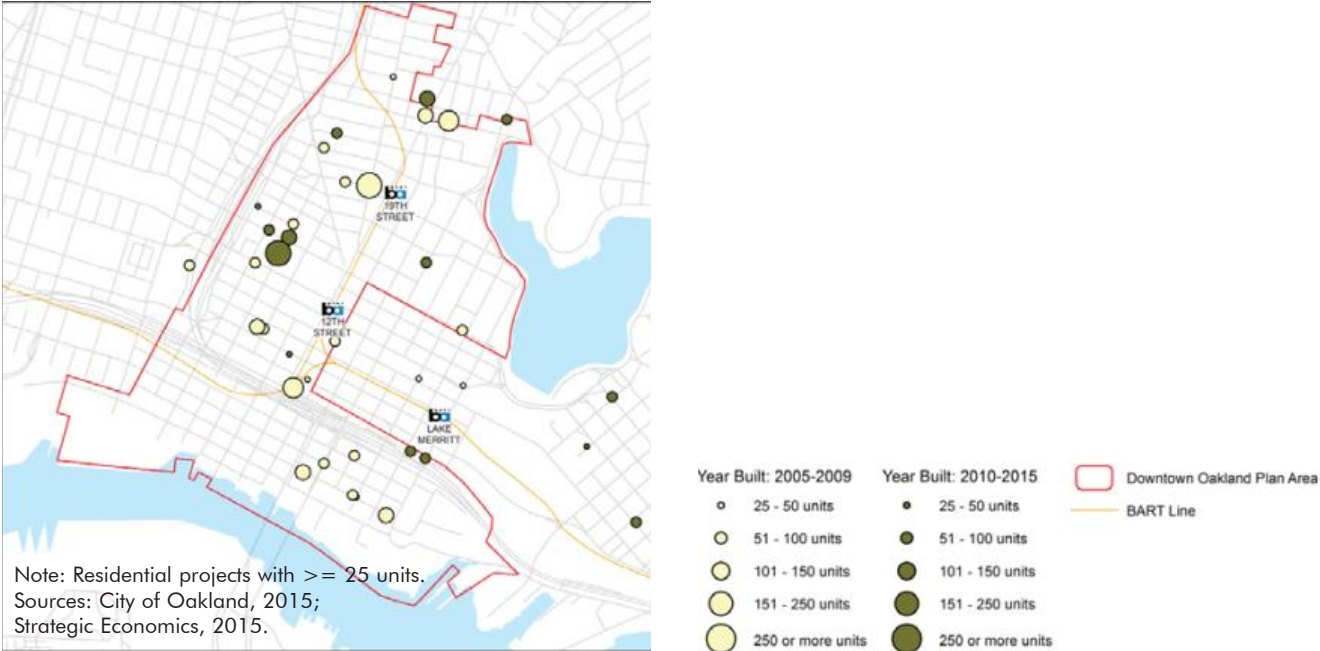
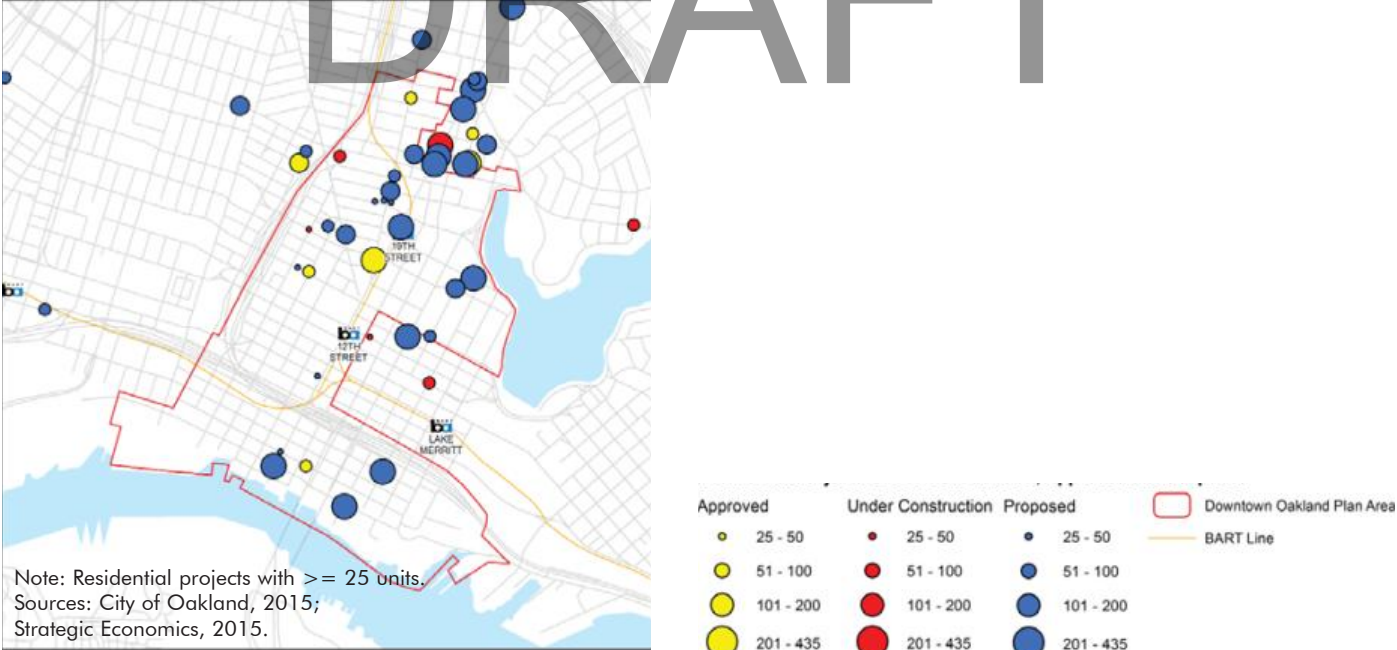


Figure 43. Residential Projects Under Construction, Approved, and Proposed



Office Market Conditions

This section describes the Plan Area's office inventory, recent performance trends, and opportunities and constraints for further growth. It includes an overview of the unique characteristics of the Plan Area's different office-oriented subareas. Where appropriate, conditions in the Chinatown / Lake Merritt Station Area Plan are also described, since the downtown office market encompasses both plan areas.

Office Inventory, Rents, and Vacancy

Downtown Oakland functions as a major regional office center, serving both the I-880 corridor and Bay Area generally. As discussed in the previous section on employment, there is a significant concentration of office-based industry employment in the Plan Area, with high numbers of jobs in professional, scientific and technical services, management of companies, finance and insurance, and growth in the information industry sector (Figure 15). Figure 44 shows that the Plan Area and Chinatown combined have approximately 19 million square feet of office space (69 percent of the city's office inventory). The building stock ranges from conventional modern high-rises in City Center and the Lake Merritt Office District, to older Class B and C buildings.

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Figure 44. All Office Inventory, Vacancy Rate, and Asking Rent, Third Quarter, 2015

Area	Inventory (RBA)	Percent of Area Total Inventory	Vacancy Rate	Asking Rent**
All Office				
Plan Area	17,275,960		6.6%	\$2.70
Chinatown*	1,608,163		1.0%	\$2.43
Oakland	27,237,272		7.3%	\$2.19
6 County Region	390,624,232		7.8%	\$2.91
Class A				
Plan Area	8,138,661	47%	6.9%	\$3.21
Chinatown*	403,762	25%	0.0%	n/a
Oakland	8,612,850	32%	6.9%	\$3.21
6 County Region	129,729,601	33%	8.5%	\$3.48
Class B				
Plan Area	7,008,364	41%	6.3%	\$2.37
Chinatown*	763,653	47%	0.6%	\$2.25
Oakland	11,725,567	43%	9.1%	\$1.93
6 County Region	183,878,706	47%	8.2%	\$2.76
Class C				
Plan Area	2,127,148	12%	6.0%	\$2.10
Chinatown*	440,748	27%	2.6%	\$2.45
Oakland	6,889,655	25%	4.7%	\$1.93
6 County Region	76,910,167	20%	5.9%	\$2.32

*All Chinatown data dates to the second quarter of 2015.

** Monthly rent, full service.

Sources: CoStar Group, 2015; Strategic Economics, 2015.

The Plan Area and Chinatown contain nearly all of Oakland's Class A office inventory, concentrated in the Lake Merritt Office District and City Center areas. As shown in Figure 44, the Plan Area and Chinatown combined have approximately 8.5 million square feet of Class A space (99 percent of the city's inventory).

The Jack London District includes a unique mix of office space compared with the more conventional buildings in other parts of the Plan Area. As shown in Figure 45, the Jack London District contains primarily Class B and C stock. With the exception of the recently-built Jack London Market Building, most office inventory in the subarea is found in buildings with smaller footprints, often as adaptive reuse.

Figure 45. Office Inventory, Vacancy Rate, and Asking Rent by Subarea, Third Quarter, 2015

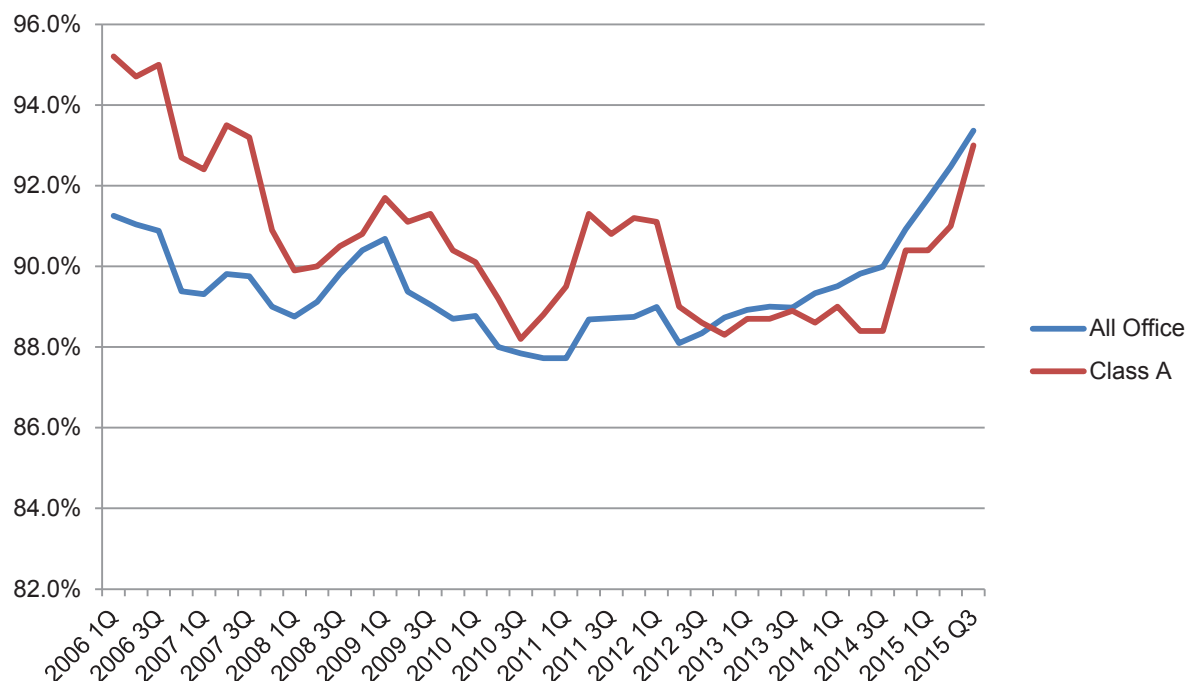
Subarea	Inventory* (RBA)	Percent of Area Total Inventory	Vacancy Rate	Asking Rent**
All Office				
Jack London District	1,609,914		8.7%	\$2.05
Remainder of Plan Area	15,623,386		6.3%	\$2.79
Class A				
Jack London District	-	-	-	-
Remainder of Plan Area	8,138,661	52%	6.7%	\$3.20
Class B and C				
Jack London District	1,609,914	100%	8.7%	\$2.05
Remainder of Plan Area	7,484,725	48%	5.9%	\$2.43

*Inventory numbers do not sum to prior table due to small variations in exported data.

**Monthly rent, full service.

Sources: Costar 2015; Strategic Economics, 2015.

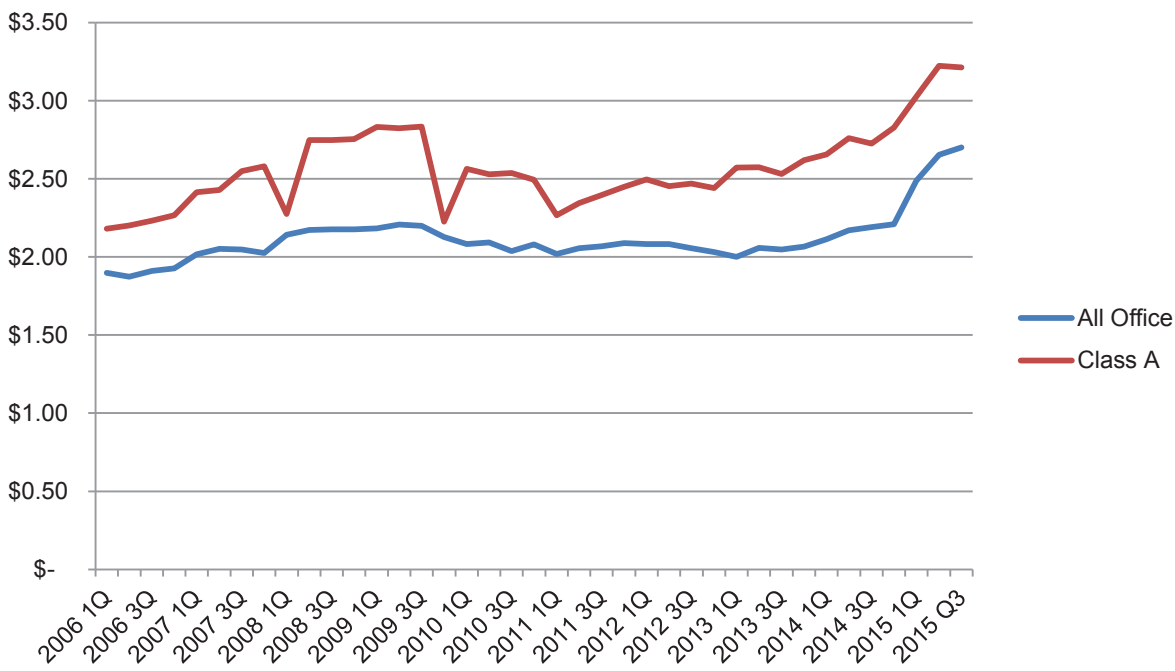
Figure 46. Average Occupancy, Plan Area, First Quarter 2006 to Third Quarter 2015*



* Data for the third quarter of 2015 number is to date.

Costar 2015; Strategic Economics, 2015

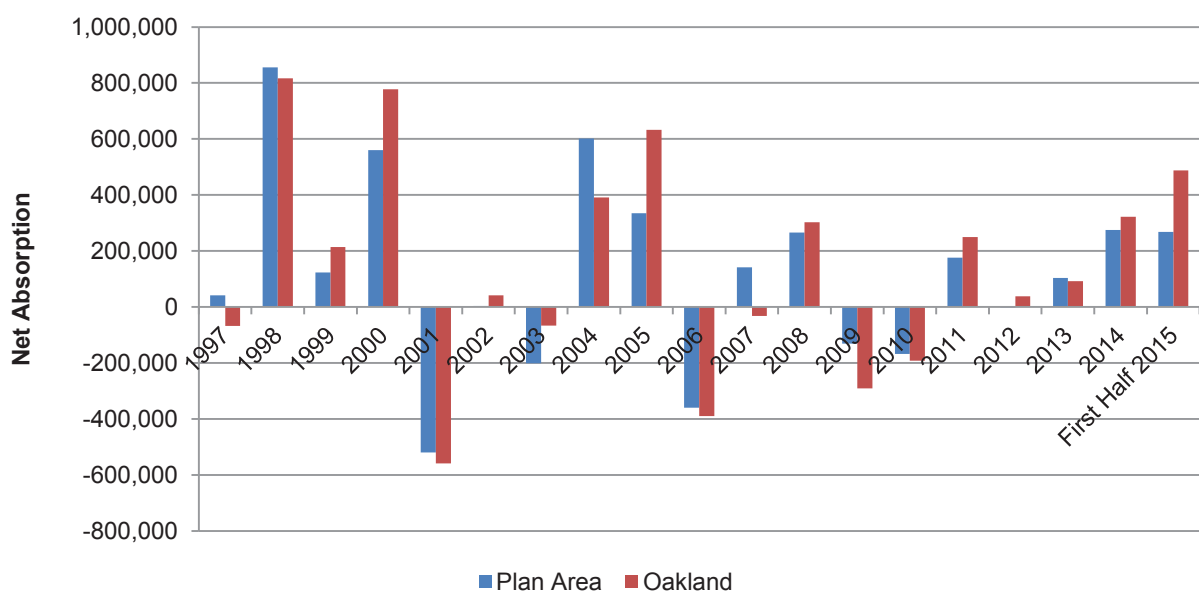
Figure 47. Monthly Average Asking Rents,* Plan Area, First Quarter 2006 to Third Quarter 2015**



* Rents are full service
 ** Q3 2015 number is to date.
 Costar 2015; Strategic Economics, 2015

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Figure 48. Average Annual Net Absorption of Office Space in the Plan Area and Oakland



Sources: CoStar, 2015; Strategic Economics, 2015.

Office rents in the Plan Area are dramatically increasing for all product types. Occupancy and asking rents have both spiked since mid-2014. Occupancy rates are approaching pre-recession levels, reaching 93 percent in the most recent quarter both for Class A product and overall (see Figure 46). Asking rents saw a similar acceleration over the last year, with average rents reaching \$3.21 per month (full service) for Class A, and \$2.70 overall (see Figure 47).

Increases in San Francisco Class A rents have greatly outpaced those in Oakland in recent years, but increasing rents in Oakland are now closing this gap. A recent analysis by Colliers International found that the gap between Class A rents in downtown San Francisco and downtown Oakland is now 77 percent.¹ This is the largest spread in recent decades, with downtown San Francisco experiencing a rapid increase in Class A rents since a recent low in 2009. Downtown San Francisco Class A rents typically fall to within a few percentage points of Oakland rents during recessions – such as the early 2000s and around 2008/2009 – but recover much more rapidly. However, the recent rapid spike in Oakland rents may now help close the rent gap.

¹ SPUR, “A Downtown for Everyone: Shaping the Future of Downtown Oakland,” September 2015.

As the market has improved, the Plan Area has experienced historically high absorption of office space, despite the provision of very limited additional office space. Figure 49 shows that the Plan Area has absorbed an average annual net addition of 180,000 square feet of office space since 2011. This rate exceeds the long-term average annual rate of 130,000 square feet since 1998, including unusually high absorption during the dot-com growth period. Relatively low vacancies suggest that it is likely that absorption would be higher if additional office space were available. Strong absorption may indicate a re-positioning of the Oakland office market to capture higher amounts of office space in the future, barring a downturn in the regional economy.

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Figure 49. Average Annual Net Absorption of Office Space by Location and Period

	Plan Area	Oakland	6 County Region	Oakland as % of Region
1998 to 2000	513,236	602,829	8,133,747	7.4%
2001 to 2005	43,738	87,934	928,079	9.5%
2006 to 2010	-50,123	-120,602	797,014	-15.1%
2011 to 2nd Quarter 2015	182,268	264,386	6,750,048	3.9%
1998 to 2nd Quarter 2015	133,028	161,993	3,622,967	4.5%

Sources: CoStar, 2015; Strategic Economics, 2015.

Office User and Development Trends

Downtown Oakland has experienced minimal additions to its office inventory over the past fifteen years and has long struggled to attract private office development. As described in the recent SPUR report “A Downtown for Everyone,” private office development in Downtown Oakland is made difficult by a lack of large anchor tenants, low rents relative to San Francisco and other parts of the region, high regional construction costs relative to local rents, and a perception among institutional investors that Oakland is an unproven market. As shown in Figure 50, only three office projects have been completed in the Plan Area since 2005, totaling 440,000 square feet and rising between four and nine stories. However, 110,000 square feet of this space were built for the Alameda County Social Services Agency, continuing the trend of large public sector agencies anchoring new office space in downtown Oakland.

Downtown Oakland’s major office-based employers include government agencies, private sector headquarters, and a number of firms that have recently relocated to Oakland. The office space in the Plan Area and immediately surrounding area is home to a number of government agencies, including the City of Oakland, Alameda County, Oakland Unified School District, AC Transit, CalTrans District 4, regional agencies, University of California, and many others. Major private sector headquarters include Kaiser Permanente, Clorox, Pandora, Cost Plus World Market, and Ask. A variety of newer companies have relocated to downtown Oakland recently to enjoy its combination of access, activity, and lower costs; examples include Sunset Magazine and Sungevity in Jack London Square and Gensler architects in the Lake Merritt Office District.

Office rents in the Plan Area are approaching a level at which new Class A space can become financially feasible to construct. Per developers and brokers interviewed, expected monthly rents need to reach approximately \$5 per square foot, full service, for a new Class A project to pencil, while top-end rents are currently \$3.50. However, given that a new office tower would deliver significant inventory all at once, financiers would require that 50 to 75 percent of the space be pre-leased to a major tenant before construction can proceed.

Figure 50. Recently Completed (since 2005), Under Construction, and Approved Office Projects in the Plan Area

Name	Address	Retail (SF)	Office (SF)	Status
Thomas Berkeley Square	2000 San Pablo Ave	5,000	114,000	Completed (2009)
Jack London Market	55 Harrison	62,000	110,000	Completed (2009)
Center 21	2100 Franklin St	15,000	218,000	Completed (2007)
Sears Building	1945 Broadway		400,000	Construction
City Center T12 (2005)	12th and Jefferson		600,000	Construction
Kapor Center	2134 Broadway		44,000	Construction
1100 Broadway	1100 Broadway	9,810	310,285	Approved
City Center T5/T6 (2005)	1100 Clay St	7,500	600,000	Approved
Kaiser Center	300 Lakeside Dr	22,000	1,345,000	Approved

Sources: City of Oakland, 2015; Strategic Economics, 2015.

The technology sector and other users of “creative” office space represent an increasing proportion of demand for office space in the Plan Area. According to broker and developer interviewees and city staff, technology companies are expressing increased interest in office space in Oakland, particularly given the high cost of space in San Francisco. Technology and other creative firms generally seek creative office spaces with open floor plans, often in converted industrial buildings or re-designed spaces in existing office buildings. Demand for creative office space has spurred a range of rehabilitations and conversions, especially in and just south of the Uptown district and in the Jack London District. Per interviews with brokers, tenants historically sought smaller spaces under 10,000 square feet, but demand has broadened to include a wide variety of sizes as larger businesses have begun to investigate opportunities in downtown.

The Uptown arts and entertainment district is attracting unique office tenants. As a result of Uptown’s amenities and opportunities for adaptive reuse, a number of technology and creative companies with unique space needs are seeking to locate in the vicinity. Examples include offices for internet music companies that include recording spaces, or other creative firms that seek both office space as well as street level storefronts.

Figure 51. Office Projects Recently Completed (2005 to 2015), Planned, and Proposed



Retail Market Conditions

The Downtown retail market was recently closely examined in the 2013 study “Market Assessment of Retailing Along the Broadway Corridor in Downtown Oakland,” authored by Hausrath Economics Group for OBDC Small Business Finance. The study documented retail conditions and opportunities in ten subareas surrounding the Broadway corridor, eight of which are similar to those in this report and include the bulk of the active retail locations within the Plan Area. This section summarizes key findings from the previous market assessment and provides updated information and additional insights into current conditions based on updated market data and interviews with brokers, developers, and business district representatives.

Retail Overview

The Plan Area retail mix is shifting toward “experience-oriented” dining, drinking, and entertainment businesses. Uptown and KONO have emerged as major dining, drinking, and entertainment districts in the last five to ten years, complementing the reopening of the Fox Theater and popularity of the Art Murrum and First Friday events. Other retail districts – including Old Oakland and the Jack London District – have also experienced similar improvement in retail and restaurant activity. These outcomes in part reflect national trends that are orienting retail to serving local residents and/or providing experiences rather than simple shopping, as comparison goods¹ shopping increasingly moves to the internet and the remaining destination retailers cluster in large regional centers.

The Plan Area’s retail space is well-leased and

¹ “Comparison goods” are infrequently-purchased, high-priced items for which a shopper is likely to compare options and prices; examples include apparel, appliances, toys, books, and furniture. These retailers typically cluster in regional destinations, such as a major mall or shopping district.

attracting high rents. Interviews with brokers, developers, city staff, and business district economic development staff indicate that the vacancy rate is now below five percent for street retail storefronts along the major Plan Area corridors. Typical rents range from \$2 to \$2.25 per square foot, up to \$2.50 at highly desirable locations such as Broadway and Grand Avenue. **Population growth in the Plan Area is also increasing demand for neighborhood amenities.** Recent housing development in the Plan Area has created a larger base of residents. These residents require day-to-day neighborhood amenities, such as cafes, restaurants, dry cleaners, convenience stores, and food and drug stores. As a result, areas such as Old Oakland, the Jack London District, and Uptown are more likely to support expanded business hours and more diverse business mixes.

The Plan Area has limited potential to capture national comparison goods retailers – particularly in larger store formats; growth of comparison goods retail is targeted to the Broadway/Valdez District Specific Plan Area. The 2013 OBDC/Hausrath study and previous studies found that Oakland experiences significant leakage of comparison goods sales to other cities, to such an extent that even a modest additional capture of these sales would allow for significant development in Oakland. However, comparison goods retailers prefer to cluster in large nodes, allowing cross-shopping between stores. The OBDC/Hausrath report noted that a new retail cluster would need to incorporate at least 1 million square feet of retail, attract anchor tenants, create a vibrant public environment, and incorporate smaller related uses. The creation of such a node is highly challenging without unified control of large sites or buildings. Growth of these uses has already been targeted to the Broadway/Valdez District just north of the Plan Area, since it includes large development opportunity sites. Even Broadway/Valdez may struggle to meet the challenges of creating a new comparison goods shopping district, while the Plan Area is more likely to continue to incrementally expand its base of small specialty retailers and experience-focused businesses.

The Plan Area's dining, drinking, and entertainment-oriented districts each emerged in different time periods, and remain somewhat isolated from each other. Old Oakland became such a district in the 1970s/1980s, Jack London Square in the 1980s/1990s, and Uptown more recently. Since each of these districts emerged independently – often as a result of concerted targeting of public sector resources – they remain somewhat isolated. While efforts have been made to better connect these districts – particularly via the free Broadway shuttle and current studies to assess an enhanced circulator bus or streetcar – they largely function independently of each other today.

Retail Locations and Trends

Each of the Plan Area's subareas contains a unique mix of retail (including entertainment, restaurants, and bars/lounges), market niches, trade areas, and performance. The subareas are profiled below; the Lakeside district is not discussed in detail since it is mainly a residential neighborhood with small amounts of dining and neighborhood-serving convenience retail.



Koreatown Northgate (KONO)

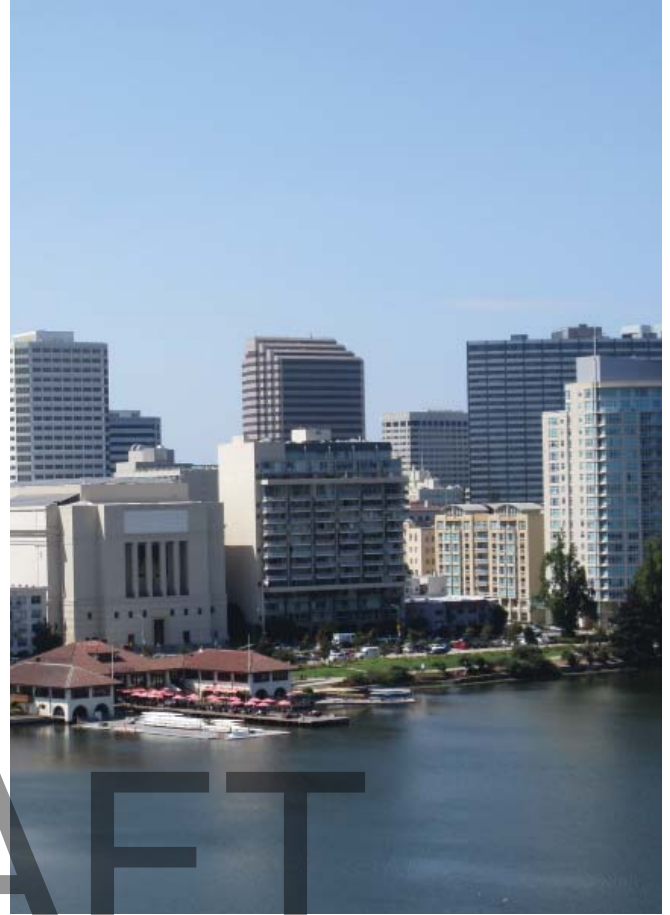
- **KONO retail consists of a mix of Asian-oriented convenience retail along Telegraph Avenue, automotive repair garages related to Broadway's historic auto row, and a mix of arts uses including galleries and an independent movie theater.** KONO's eclectic mix of retail serves local residents and workers, as well as increasingly serving as a draw for visitors from throughout the region.
- **KONO is rapidly evolving as its uses transition toward dining, entertainment, and arts uses.** KONO is shifting away from automobile-related uses as early-20th century garages are repurposed as art galleries – particularly between Telegraph Avenue and Broadway – and restaurants are added in the surrounding area. This evolution is complemented by the area's Art Murrum gallery walk events, First Friday street festivals, and residential population increases in newly-constructed residential buildings.





Uptown

- Uptown is a vibrant nightlife district, including a high concentration of dining, drinking, and entertainment establishments. Uptown's nightlife and entertainment venues create a regional draw for customers, while it secondarily serves local residents and nearby office workers.
- Although Uptown has lost significant sales in comparison goods shopping, the district has undergone a rapid transformation into its status as a dining and nightlife district, anchored by the Fox Theater and Paramount Theater. The OBDC/Hausrath retail study found that the Uptown was suffering a severe decline in comparison goods sales. Sears – the last remaining department store in the Plan Area – closed in 2014, likely eliminating most of the district's remaining comparison goods sales. Despite these losses, the 2009 reopening of the Fox Theater as a concert venue has anchored the growth of nightlife in the district, while Uptown also benefits from additions of residents in new housing and the attention drawn by the Art Murmur and nearby First Fridays events.



Lake Merritt Office District

- Retail in the Lake Merritt Office District primarily consists of convenience retail and eating and drinking establishments, with much of the retail targeted to local office workers. Outside of areas closer to Broadway and Grand Avenue, much of the district's retail serves daytime workers.
- Retail and restaurant establishments in the Lake Merritt Office District have benefitted from the expanding Downtown workforce and new activity along Broadway and Grand Avenue. The OBDC/Hausrath retail study found that sales in the district were performing well, though not undergoing a notable change in business mix. However, new coffee shops, bars, and restaurants near the intersection of Broadway and Grand suggest that this portion of the district is transitioning toward more nighttime-oriented uses related to activity in Uptown and KONO, as well as expanded daytime activity driven by new residents in buildings along Grand Avenue.



City Center Area

- **City Center retail primarily consists of convenience shopping and daytime dining establishments serving local office workers.** The City Center Area also generates some comparison goods sales, including stores selling shoes, electronics, books, and apparel.
- **City Center retail is well-established and generates high overall sales, but suffers from limited activity outside of weekday office hours.** The OBDC/Hausrath study found that, as of 2011, the City Center Area generated over a quarter of sales within the Plan Area's major retail districts. Local office workers provide a consistent base of daytime customers for dining and convenience uses. However, operating hours of retail in much of the district will remain constrained by limited hours of activity so long as the City Center Area is primarily an office district.



Old Oakland

- **Old Oakland is both a dining and entertainment district and a specialty and convenience retail area.** Old Oakland contains a number of restaurants and bars, and some small specialty retailers. At the same time, it serves convenience retail needs, including a Smart and Final grocery store. As a result of this business mix and the district's proximity to City Center and BART, Old Oakland serves local downtown residents/workers and customers from throughout the region.
- **Old Oakland's overall mix of businesses is well-established and stable.** Old Oakland is becoming increasingly popular as a dining and drinking destination, but its overall business mix – and emphasis on dining, drinking, and convenience retail – is not undergoing a major transition.



Jack London District

- This area is a regional destination, with a mix of restaurants and clubs, entertainment, and comparison goods retailers.** The Jack London District area has served as a regional entertainment and dining destination since initial efforts to transform the waterfront area in the 1980s. It includes restaurants, clubs, a multiplex movie theater, the recently-opened “Plank” bowling alley, and comparison goods shopping at Cost Plus World Market and Bed, Bath, and Beyond.
- The character of the area is shifting, as regional destinations become more “experience-focused.”** At the time of the OBDC/Hausrath study, the Jack London District was suffering from significant retail losses, including the Barnes & Noble book store and difficulties tenanting the newly-built market hall at the Jack London Market Building. The area is now recovering, with the addition of Plank and planned opening of the Water Street Market, an upscale multi-vendor food marketplace. Notably, these uses are not traditional comparison goods retailers, but instead serve as destinations offering interactive and varied experiences not available in other East Bay locations. Their additions complement other experience-focused retail outlets, such as restaurants, the movie theater, and Yoshi’s Oakland jazz club and restaurant.
- The addition of new residents and office workers is driving increased demand for neighborhood amenities in the Jack London area.** Demand for local-serving amenities in the Jack London District – such as cafes, convenience stores, dry cleaners, etc. – will continue to grow as the area’s residential and worker base increases. The area’s industrial building stock provides opportunities for businesses to provide retail storefronts while also operating wholesale, production, and distribution facilities.
- Access, visibility, and lack of a major daytime anchor remain an ongoing concern for the viability of smaller retail in the Jack London District.** The Jack London District is isolated from the core of Downtown Oakland by the I-880 freeway. The underpass and surrounding blocks create a “dead zone” for pedestrians going to and from regional transit connections in Downtown, while driving routes into and out of the subarea can be confusing. Without a consistent daytime anchor to draw shoppers to the area, brokers report weakness in retail performance within the waterfront Jack London Square project itself. Some of these barriers may be overcome with continuation of the free Broadway Shuttle connection (or other enhanced connections), planned opening of Water Street Market, and continued growth of the local resident population - including in the major planned development at neighboring Brooklyn Basin.

Hotel Market Conditions

This section presents a summary of hotel inventory in the Plan Area relative to the City of Oakland and the broader East Bay. It also describes trends in hotel inventory growth and the strength of the current hotel market in Oakland.

Eight major hotels are located in the Plan Area.

These hotels represent nearly one-third Oakland's total room inventory and nearly three-quarters of Oakland's midscale hotels. As shown in Figure 52, the Plan Area and immediately adjacent blocks include eight major hotels with 1,200 rooms. Downtown hotels are primarily of the midscale and upscale variety, targeted to business, convention, and leisure travelers. The city as a whole has about 4,000 rooms, and there over 24,000 in the East Bay.¹ These numbers do not include single-room occupancy and residential hotels.

Hotel performance is at a record high, driven by the strong economy and increased tourism.

As with the Bay Area hotel market generally, the Oakland hotel market has rebounded from its lows in 2009. Figure 53 shows that citywide transient occupancy tax receipts have increased by nearly 90 percent since the 2009/2010 fiscal year, with steady year-over-year growth. Oakland hotel occupancy rates were 79 percent in 2015²; hotel demand is typically considered to exceed supply when occupancy rates exceed approximately 70 percent.

Downtown Oakland is positioned to add hotel

rooms in the near future. No major hotel has been built in Downtown Oakland since the Courtyard Marriott opened in 2002. The strength of the current market and limited existing options are driving investments to improve existing properties and heightened interest by hotel developers. There is currently a proposal to construct a new 95 room, 6-story Hampton Inn hotel half a block outside the City Center subarea, at 378 11th Street. A project announced in May 2015 also proposes to convert an existing single-room occupancy hotel at 392 11th Street to a boutique hotel with between 85 and 100 rooms.³

3 Annie Sciacca, "New Boutique Hotel Heads to Downtown Oakland," San Francisco Business Journal, May 6, 2015. <http://www.bizjournals.com/sanfrancisco/blog/2015/05/new-boutique-hotel-heads-to-downtown-oakland.html>

Figure 52. Plan Area Hotels, by Class and Subarea

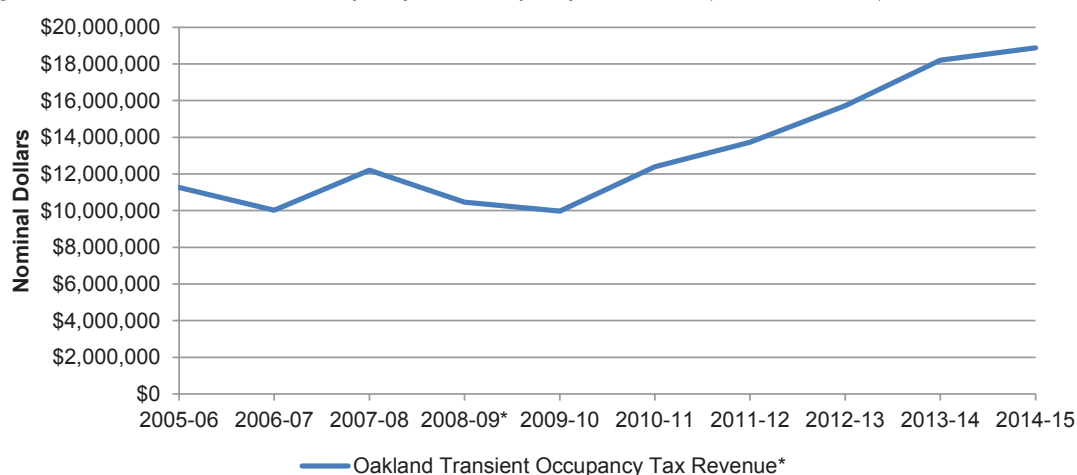
Name	Class	Rooms
City Center		805
Sutter Hotel	Economy	90
Oakland Marriott City Center	Midscale	489
Courtyard Oakland, Downtown	Upscale	162
Clarion Hotel	Midscale	64
Jack London		353
Jack London Inn	Midscale	110
Waterfront Hotel	Midscale	145
Inn at Jack London Square	Upscale	98
Old Oakland		47
Washington Inn	Upscale	47

Sources: Smith Travel Research, 2014; Strategic Economics, 2015.

1 STR Global; note that STR user agreements limit detailed public reproduction of data.

2 Data prepared by STR for Visit Oakland: Annie Sciacca, "Oakland Tourism Smashes Records as Industry Considers New Hotel Fee," San Francisco Business Journal, May 5, 2015.

Figure 53. Oakland Transient Occupancy Tax Receipts by Fiscal Year (nominal dollars)



Sources: City of Oakland, 2006 to 2015; Strategic Economics, 2015.

Industrial Market Conditions

Industrial Market Conditions

This section briefly examines inventory and trends in industrial – or “production, distribution, and repair” (PDR) space within the Plan Area. This space includes manufacturing facilities, warehouses, and other uses which require relatively unfinished and open space. This section also examines “flex” space, which typically consists of a mix of office and PDR space, depending on user needs.

Industrial Inventory and Performance

- The Plan Area includes 1.6 million square feet of PDR space and 390,000 square feet of flex space, concentrated in the Jack London and KONO areas. Ninety percent of Plan Area PDR space is located in the Jack London area, and about three-quarters of the flex space. An additional 100,000 square feet of PDR space is located in KONO, and small amounts of PDR and flex space are found elsewhere in the Plan Area. The Jack London District includes early-to mid-20th century warehouse and manufacturing buildings, while most buildings in KONO are smaller early-20th century buildings largely in the 3,000 to 6,000 square foot range.
- A relatively small proportion of Oakland’s industrial space is within the Plan Area. As discussed in the employment section, most industrial uses are located outside the downtown. Despite containing a seemingly large inventory of PDR and flex space based on square footage, the Plan Area includes less than five percent of Oakland’s PDR building stock, and 15 percent of its flex building stock.
- Demand for PDR and flex space is strong, both within the Plan Area and Oakland generally; however, attainable rents are much lower than office and residential uses. PDR and flex space are in high demand, and vacancy rates are low. Brokers interviewed for this study noted that monthly rents in the Jack London area approach \$0.90 to \$1.00 per square foot, compared to approximately \$0.60 citywide. Despite this strong performance, office and residential uses can support higher rents and values, driving interest in reuse and redevelopment of industrial properties.

Figure 54. PDR* Inventory, Vacancy Rate, and Asking Rent, Third Quarter of 2015

Area	Inventory (RBA)	Vacancy Rate	Asking Rent
Plan Area Total	1,622,891	1.2%	-
Jack London			
Square	1,411,501	0.7%	-
Chinatown	118,613	1.8%	-
Oakland	33,807,945	3.5%	\$0.57
6 County Region	406,184,272	4.6%	\$0.72

*Nearly 90% of Plan Area PDR buildings are defined by CoStar as “warehouse” space, but actual use vary.

Sources: CoStar Group, 2015; Strategic Economics, 2015.

Figure 55. Flex** Inventory, Vacancy Rate, and Asking Rent, Third Quarter of 2015

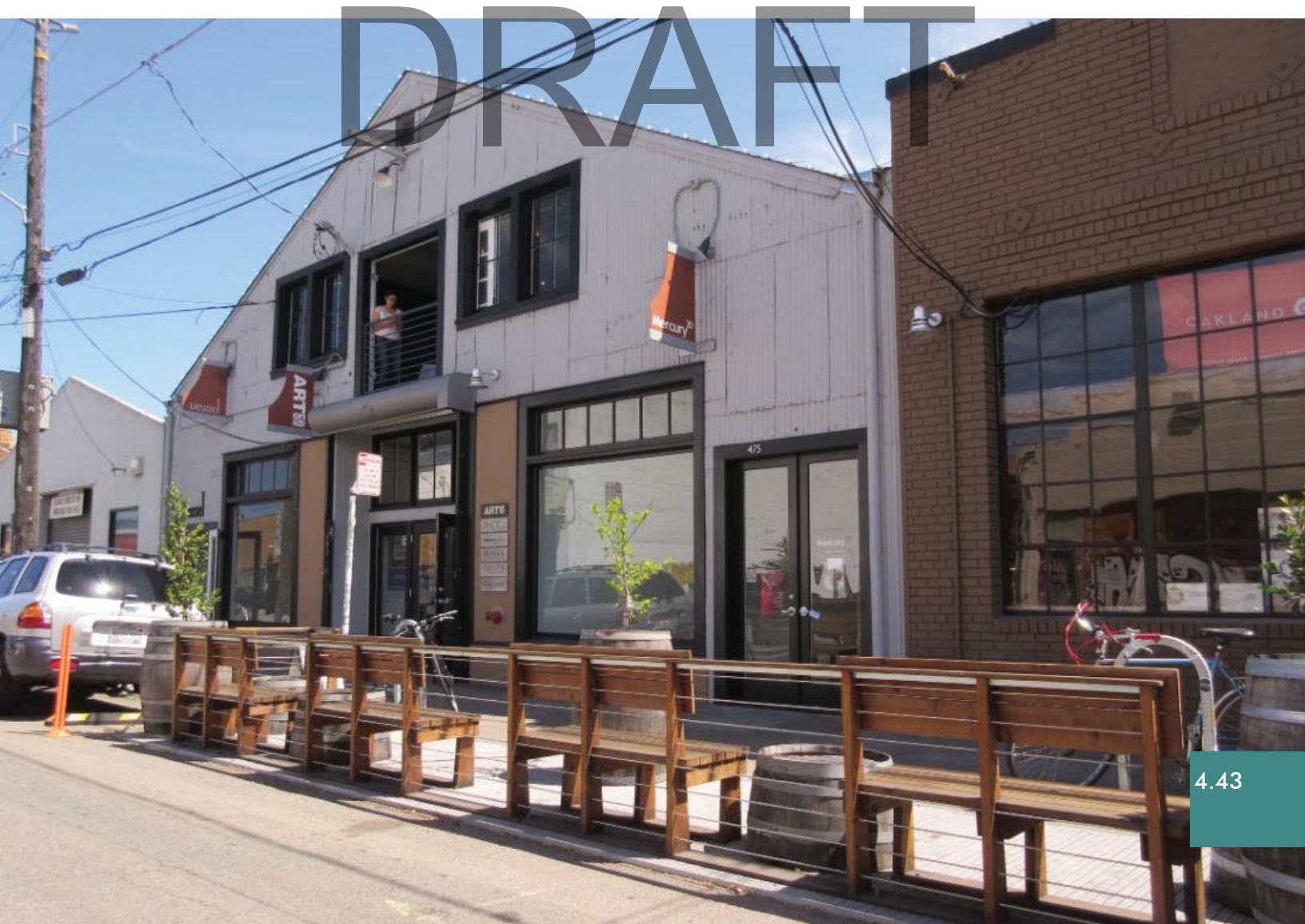
Area	Inventory (RBA)	Vacancy Rate	Asking Rent
Plan Area	391,442	4.0%	-
Jack London			
Square	299,415	3.8%	-
Chinatown	37,452	0.0%	-
Oakland	2,522,014	4.0%	\$0.50
6 County Region	188,884,402	9.6%	\$1.59

**Flex buildings include a mix of office and light industrial uses, with the share of each use varying.

Sources: CoStar Group, 2015; Strategic Economics, 2015.

PDR/FLEX USER TRENDS

- Jack London Square’s industrial buildings are outdated for large traditional manufacturing and distribution operations, and are instead often targeted for office conversion, arts uses, or leased to small-scale industrial users with unique needs. Interviews with brokers and other local experts indicate that much of Jack London’s building stock is not compatible with the needs of modern, large-scale distributors due to poor loading facilities, limited parking, and low ceilings. Instead, these uses are often targeted for conversion to higher-value uses. New uses include “creative” offices seeking unique space with exposed structural elements, and small businesses that combine production, retail, and office uses (such as small food and beverage manufacturers and sellers). Arts uses – including galleries and performance/rehearsal spaces – are also repurposing these buildings.
- KONO’s automobile-related uses are slowly phasing out as buildings are repurposed for arts and retail uses. The KONO area is slowly losing its historic base of automobile repair facilities related to Broadway’s auto row. Instead, many of these buildings are being converted to arts spaces that are related to Art Murmur and First Fridays. This change was reportedly driven in part by a major property owner seeking new and creative uses for buildings.



Coffee

NO PARKING
3:00 AM TO
6:00 AM
MON WED FRI
VIOLATION \$100





5

INITIAL COMMUNITY INPUT


DRAFT

initial community input

In order to kick-off the Downtown Oakland Specific Plan with the public, a community-wide event was held on September 3 in the Rotunda Building downtown. More than two hundred (200) people attended.

The Specific Plan team presented an overview of the project schedule to members of the public, highlighting opportunities for public input. In addition, project themes were presented, including initial observations related to street design, public spaces, livability, walkability, historic preservation, affordable housing, the environment, economics and social equity, sustainability, architecture, landscape design, as well as a brief discussion of the evolution of City form.

During and after the presentation, participants were asked to contribute initial thoughts and feedback regarding their vision for the future. Surveys were handed out, and citizens offered a variety of ideas, including increasing the stock of affordable housing and preventing displacement, considering the environmental effects of future development, and ensuring that transportation and mobility in downtown Oakland strengthens walking, biking and transit use.




PLAN DOWNTOWN OAKLAND
DOWNTOWN OAKLAND SPECIFIC PLAN

Of the many ideas you saw today, which ones seem most exciting to you?

Creating integrated abyscapes that promote social enclaves. Finding realistic ways to avoid displacement of long-term residents due to gentrification. Creating real interstices between the interests of old and new residents that do not alienate either.

What questions or suggestions do you have?

We need a diversity of businesses represented downtown. It would be great to have a large, cozy



PLAN DOWNTOWN OAKLAND
DOWNTOWN OAKLAND SPECIFIC PLAN

Of the many ideas you saw today, which ones seem most exciting to you?

One-way → Two-way streets = Complete Streets! Walkable retail, cities are the greatest invention! Ties to Oakland. Loved the polling!

What questions or suggestions do you have?

More emphasis on current issues impacting Oakland, comparing what was done in other cities w/ similar issues and what solutions worked or did not work.

I'd like to have more about ideas for affordable housing and preserving local shops/businesses - in future workshop.

How can we connect to West Oakland? Other neighborhoods to be more welcoming.

Please write any additional comments:

As a planner I found this presentation helpful, insightful and informative, overall but I would recommend shorter presentations and more interaction (if possible). I think there was a bit too much emphasis on transportation. I'd like to have more on social & economic issues/ideas/examples.

Thanks for your help and your ideas!
Please leave this on the table at the door.

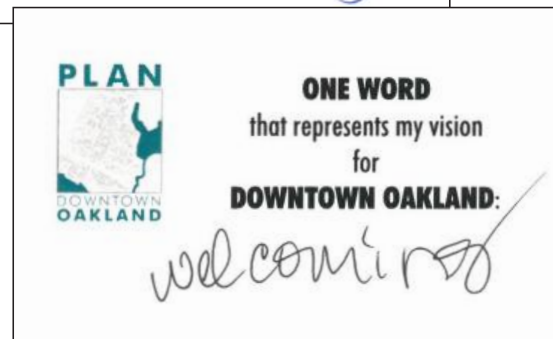
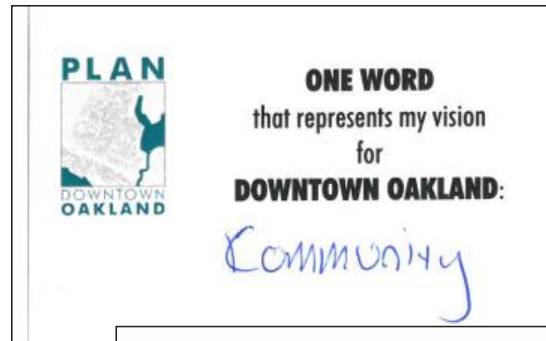
Snacks eat time? Drinks work great!



Downtown Oakland, In One Word

"One-word cards" were handed out during the event, asking participants to describe their ideas for the future in one-word. A series of responses, covering a spectrum of topics, including mobility, affordability, and safety, were suggested.

A word cloud, depicting the details of the responses was created (pictured below). The larger the word, the bigger the idea in the word cloud.



DRAFT



Question-and-Answer Session

Throughout the presentation, participants were asked to contribute their feedback through interactive key-pad polling. A series of question and answer sessions, with instant results, revealed who was in attendance and the topics and opinions of audience members.

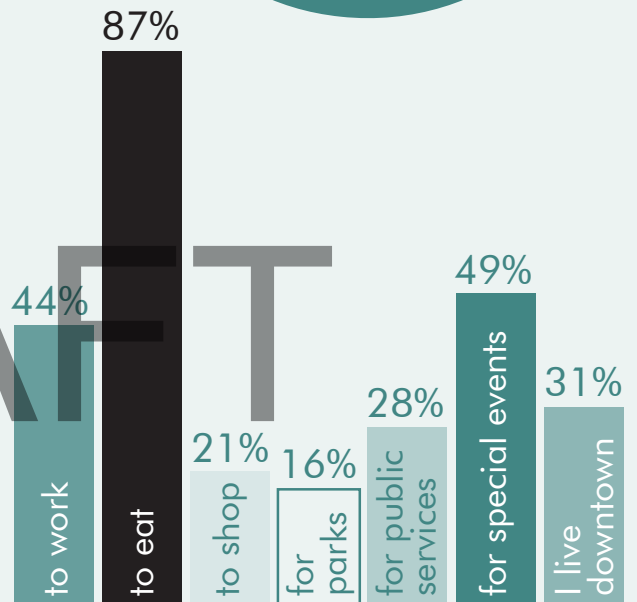
All participants were invited to attend the open design studio and charrette from October 19-28.



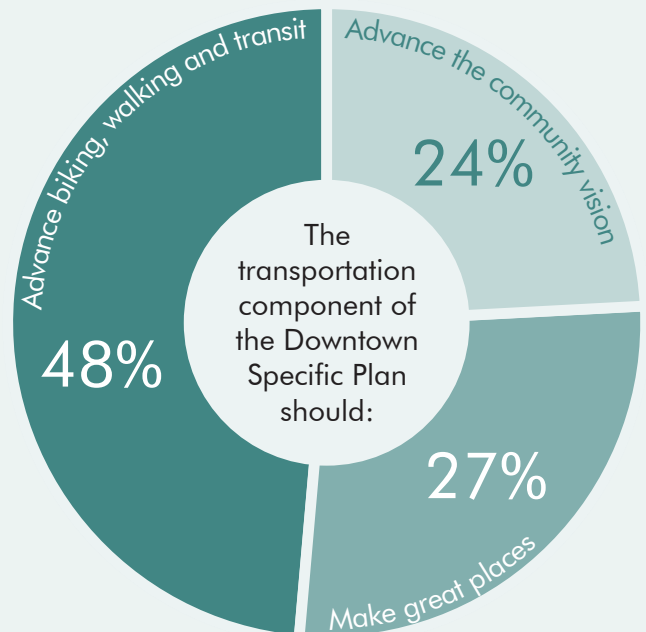
Keypad Polling Results

The primary way I typically move within downtown is by WALKING

56%



The primary reasons I come downtown



list of involvement opportunities by task

Detailed Schedule of Public Involvement Opportunities for the Downtown Specific Plan

Phase	Task #	Action	Date
Phase 1	1.1: Project Team Establishment	Project Kick-off call. Begin Brainstorming on Stakeholders and Public Involvement Process	July 2015
	1.2 Site Visit #1	Project kick-off site visit. Meetings and coordination with City staff and area stakeholders	August 6 - 7, 2015
	1.6: Public Involvement Plan	Preparation of Public Involvement Plan	August 2015
		Preparation of base materials for advertising public charrette events	August - September 2015
	1.7: Site Visit #2	Meet with Project Team: Discuss Plan Area	September 1- 4, 2015 September 1, 2015
	1.7.1: Project Team Meeting		
	1.7.2: Stakeholder Meetings and Interviews	Meet with a variety of City and public agency staff, as well as advocates, time permitting	September 1-4, 2015
	1.7.3: Project Area Tour	Tour with key Client Personnel	September 1 & 4, 2015
	1.7.4: Community Kick-off Event	Kick-off presentation to the Community, announcing project & big ideas	September 3, 2015
	1.7.5: Kick-off Press Conference (Optional)	Interviews with Press to get the word out	September 1- 4, 2015
	1.7.6: Site Visit Notes & Memo of Interview Results	Memo of Site Visit Summary Due	September 2015

* Dates are approximate and will be finalized depending on the number of weeks available to compile City and Public comments for revisions to the draft documents.

** Return presentation dates will be determined in advance with the client. The project timeline extend further to accommodate Planning Commission and City Council schedules and adoption timelines.

Detailed Schedule of Public Involvement Opportunities (continued)

Phase	Task #	Action	Date
Phase 2	Task 2.2: Charrette		
	2.2.1: Kick-off Event & Hands-on Design Session	Community Wide Public Event and Information Session	October 19, 2015
		Walking Tour with Community Members	October 24, 2015
	2.2.2: Open Design Studio	Consultant Team working on site in Downtown Oakland. The studio will be open to the public to drop by at anytime.	October 20-27, 2015
	2.2.2.1 Stakeholder & Technical Meetings	Technical and Stakeholders Meetings to be determined with the City following the Site Visit.	October 19-28, 2015
	2.2.2.4: Public Open House	Community Wide Event where public can comment on draft plans and contribute ideas for the Specific Plan	October 22, 2015
	2.2.3: Work-in-Progress Presentation	Community Wide Meeting to present the Specific Plan and concepts developed throughout the charrette.	October 28, 2015
	2.3: Plan Alternatives Report	Report Summarizing Specific Plan Alternatives	December 2015
	2.4: Preferred Alternative Plan Memo	Memo documenting Preferred Alternative Plan	January/February 2016
Phase 3	3.1: Administrative Draft	First Draft of the Plan will be made available to City Staff for comment	Spring 2016
	3.2: Public Review Draft & Public Workshop	Draft Specific Plan will be made available to the public for comment & Project team will hold Community Wide Workshop	Spring / Summer 2016
	3.3: Presentation of the Final Draft Specific Plan	Draft Specific Plan will be presented in a public forum. May be a regular Planning Commission or City Council meeting or at a special session.	TBD**
	3.4: Final Specific Plan	Final Specific Plan will be made available.	Summer / Fall 2016
	3.5: Presentation of the Final Specific Plan	Public Hearing(s) for adoption	TBD**
	3.6: Presentation of the Final Specific Plan	Additional Meetings	TBD**
Phase 4	Phase 4 consists of the creation of an EIR for the Downtown Oakland Specific Plan. There will be several opportunities for public participation throughout the EIR process. These dates/meetings will be scheduled when Phase 4 work begins.		