

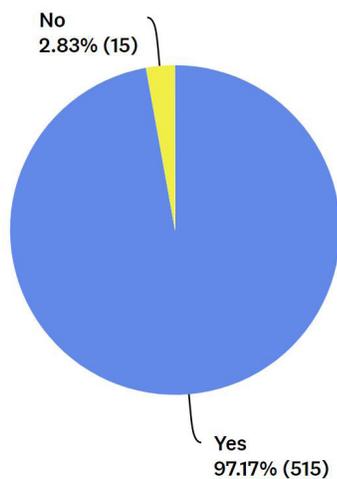
The East Cut Community Benefit District Grocery Survey Brief

The East Cut Community Benefit District (CBD) conducted an anonymous community survey to understand the interest in and need for a new grocery store within the district. The survey was developed in coordination with the Office of Community Investment and Infrastructure (OCII), the OCII Transbay Citizen Advisory Committee, and the developer of “Block 8” in the Transbay Redevelopment plan. The survey was administered over three weeks and distributed through local Homeowners Associations and Nextdoor in February 2019, receiving 538 voluntarily responses.

The following summary brief provides insight into respondent’s grocery shopping habits and preferences.

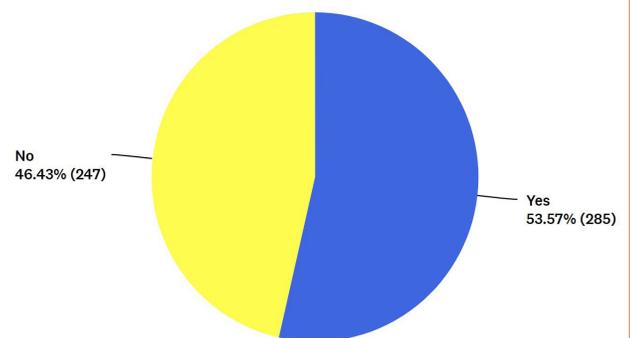
CONNECTION TO THE NEIGHBORHOOD

LIVE



The overwhelming majority of survey respondents (97%) live in or immediately adjacent to The East Cut District.

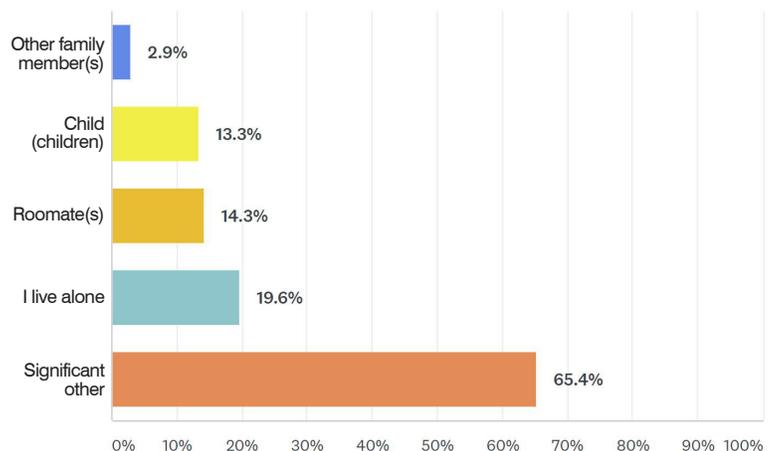
WORK / STUDY



Over half (54%) of respondents also work or study in the District.

HOUSEHOLD

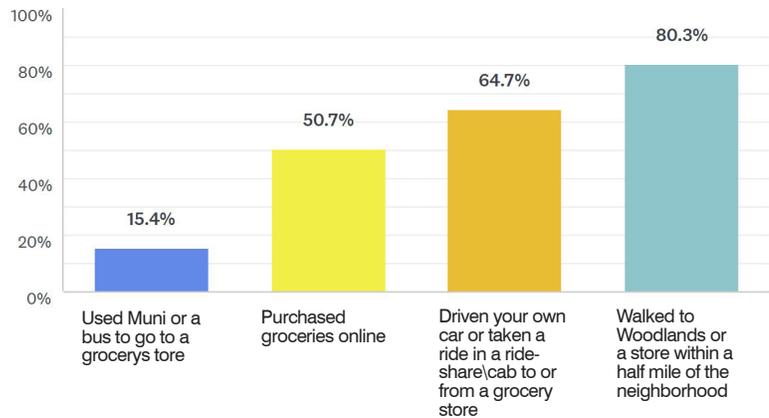
- Four out of five households have two or more residents.
- Regardless of household size, over three-quarters of respondents report walking to a grocery store to shop.
- Of those residents who live with children, the majority walk to a local grocery store, or use a car, ride-share or cab to travel to a grocery store, and more than half purchased groceries online in the past 2 months.



Summary of Grocery Store Findings

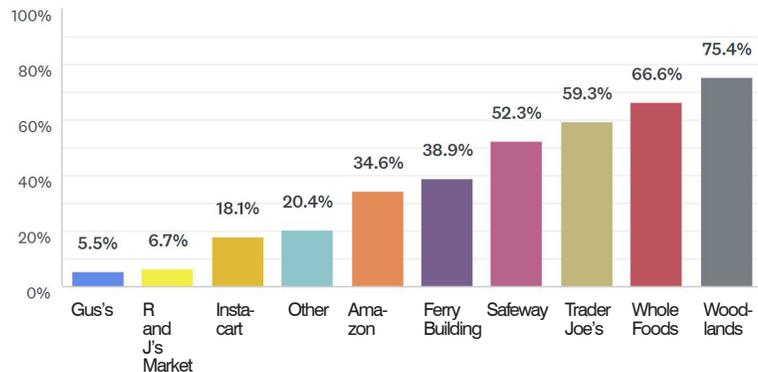
HOW DID YOU SHOP FOR GROCERIES IN THE PAST 2 MONTHS?

- The majority of resident respondents (80%) walk to a store to get their groceries.
- 65% drove their own car or used car-share/cab to get groceries. Among these respondents, over half (53%) answered that they would do significantly more local shopping with another grocery store.



WHERE DID YOU SHOP FOR GROCERIES, AT LEAST TWICE, IN THE PAST 6 MONTHS?

- The majority of resident respondents shopped at Woodlands, the closest store to the survey area, followed by Whole Foods and Trader Joes on 4th Street.
- Of those resident respondents who shop at Woodlands, 83% are very interested in having another grocery store within the East Cut District.



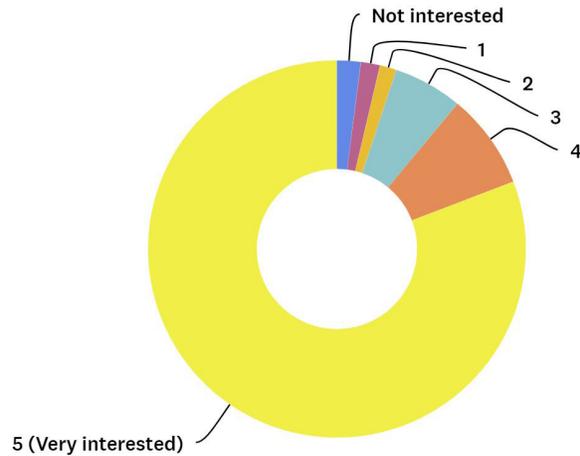
OTHER LOCATIONS RESIDENTS SHOPPED AT IN THE PAST 6 MONTHS



Summary of Grocery Store Findings

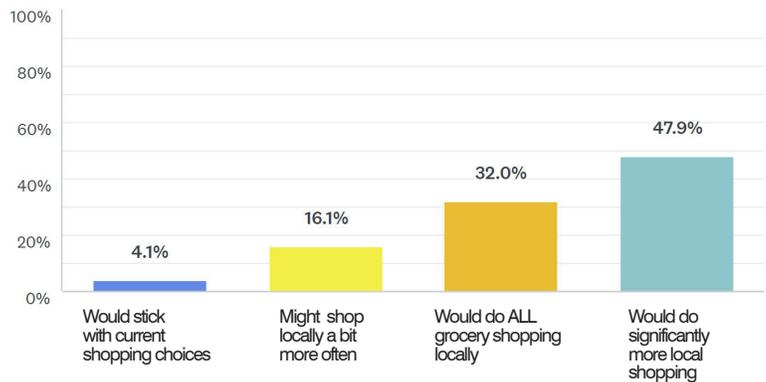
ON A SCALE OF 0-5, PLEASE RATE YOUR INTEREST IN HAVING ANOTHER GROCERY STORE IN THE NEIGHBORHOOD.

- The majority of resident respondents are “very interested” in having another grocery store in the neighborhood.
- 81% of resident respondents are very interested in another grocery option, while 2% are not. This correlates to the travel time needed to reach affordable grocers outside the neighborhood.



ASSUMING THAT THERE WAS ANOTHER GROCERY STORE IN THE NEIGHBORHOOD (AND ASSUMING MODERATE PRICES AND GREATER SELECTION THAN CURRENTLY AVAILABLE), WOULD YOUR GROCERY STORE SHOPPING CHANGE?

- Four out of five resident respondents (81%) would do significantly more or all their shopping locally if another, affordable grocery store were to move into the neighborhood.
- Only 4% of the resident respondents would stick with their current shopping choices if another grocery store moved into the neighborhood.



ARE THERE TYPES OF STORES MORE IMPORTANT THAN GROCERY? ARE THERE OTHER TYPES OF STORES YOU ARE INTERESTED IN, ALTHOUGH LESS IMPORTANT THAN GROCERY?

- Resident respondents report an interest in restaurants (particularly casual restaurants), hardware stores, pharmacies and affordable retail options that are open weekends.
- It is noteworthy that when asked about other retail needs, more than half of respondents wrote in affordable grocery store options including Trader Joe’s, Whole Foods, Safeway and Asian Market as their main interest for the district. (These answers were removed from analysis of this question and are not reflected in the word cloud.)



Conclusion of Grocery Store Findings

MAIN TAKEAWAYS

- There is a strong desire for a reasonably priced grocery store in the East Cut District. 85% of residents are interested or very interested (81%) in having another grocery store in the neighborhood.
- Four out of five resident respondents (81%) would do significantly more or all of their shopping locally if another affordable grocery store moved into the neighborhood.
- The only grocery store option in the East Cut District is Woodlands, an upscale, specialty market. Among residents who shop at Woodlands, 83% are very interested in having another grocery store in the neighborhood.
- When asked what other types of stores should be in the neighborhood, the majority of respondents still focused on affordable grocery store options like Trader Joes, Sprouts, Rainbow and Safeway. For the existing and planned affordable housing developments underway in the neighborhood, Woodlands cannot be considered a viable grocery store option.

TRANSIT + PREFERENCE

The East Cut CBD facilitated this survey to gain insight into the neighborhood's opinion on grocery stores. From the survey summary, the majority of residents walk to get their groceries or drive to a grocery store. Three quarters (75%) of residents depend on Woodlands for groceries, followed by Whole Foods with 67% of residents shopping there. Half (51%) of residents get their groceries delivered, and 15% use muni or public transportation to go to the grocery store. Interestingly, many residents wrote in Costco as their main grocery shopping destination. This could be a result of residents having to buy in bulk because there is not a local affordable grocery store option.

INTEREST IN AN ADDITIONAL GROCERY STORE

Four out of five (81%) residents were very interested in having another grocery store in the neighborhood. If there was another grocery store, half of residents would do significantly more local shopping while 32% of residents would do all shopping locally. Only 4% of residents would continue with their current shopping choices. If there was another grocery store in the neighborhood, more residents would shop locally rather than shopping elsewhere in the city.

IDEAS FOR ANOTHER TYPE OF STORE

Residents were asked if there were other types of stores they considered more important than grocery or other stores they were interested in. This field was a manual entry and the results ranged from more mentions of affordable grocery stores to cafes. Most of the responses focused on affordable grocery store options like Trader Joes, Sprouts, Rainbow, and Safeway. Many residents were interested in specialty stores such as a bakery, hardware store, or a butcher shop.