Tenderloin Neighborhood Profile
Demographics, Land Use, and Economics
San Francisco
2004
Urban Solutions is a twelve-year old 501(c)(3) nonprofit organization dedicated to improving San Francisco neighborhoods through small business development, economic development and community planning. It helps entrepreneurs qualify for loans, advises public agencies on economic development matters, conducts research on planning and policy issues, and works to build community capacity to engage in neighborhood planning.
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Introduction

Change is a constant in urban neighborhoods. New buildings are constructed, older buildings are renovated or reused, structures are sometimes demolished and replaced, and businesses can change as often as the seasons. People also come and go—new ethnic groups move in, established groups disperse to other areas, types of employment change, as do residents’ economic well-being, and some residents grow old while younger people ebb and flow with the times. How can we see and study this dynamic process?

Urban Solutions has prepared this *Tenderloin Neighborhood Profile* in the research and planning tradition of its predecessor, the South of Market Foundation. The Profile provides basic information for assessing both the assets and needs of the community. It also provides a comparison between the Tenderloin and citywide conditions for a variety of demographic variables.

Using demographic data from the 2000 Census and land use and business data collected intensive lot-by-lot field surveying in Spring 2004, the report provides illustrative snap shots of existing conditions in this important central-city neighborhood. Records from the city Treasurer’s Office and the Planning Department were also “ground-truthed” through this field survey, making this report an accurate current record. The data is presented in several series of annotated vibrant color maps that show patterns of various characteristics across the geography of the neighborhood. There are also several graphs that compare demographic data for the neighborhood to conditions for San Francisco as a whole, in some cases showing dramatic differences for residents in the Tenderloin relative to the rest of the city. The boundaries of the Tenderloin used for this Profile are Market Street to Post Street on the north, and Powell Street to Van Ness Avenue, as shown on the Key Map on the next page.

There is little detailed information about the characteristics of San Francisco’s neighborhoods and what little information is available is in a tabular, statistical format that does not allow one to really “see” the neighborhood. The Planning Department prepared a report of ‘San Francisco Neighborhood Profiles’ in 1997, however the information has not been updated and the data does not give a sense of the geographic characteristics of the neighborhoods. This *Tenderloin Neighborhood Profile* is rich with maps of demographic, land use and business characteristics, therefore, provides a new approach to conveying details about the city’s neighborhoods.

Urban Solutions anticipates producing a series of Neighborhood Profile reports for key San Francisco neighborhoods. The Tenderloin Profile, a similar South of Market Profile, and smaller profiles of the Southeastern Neighborhoods prepared in partnership with the community organizing group POWER, are the first reports in the series.
The Tenderloin Neighborhood Profile provides a comprehensive look at who and what is in the neighborhood today. Of course, this report is not exhaustive of all possible types of information about the characteristics of the Tenderloin, and in fact Urban Solutions intends to update these profile reports annually with follow-up field surveys and additional data layers to paint an ever-richer and more accurate picture. Nor is profiling a neighborhood just a matter of accumulating a volume of data—the neighborhood, any place, can also be described and understood through the “lived experience” of those folks who live there and work there and daily meander through its many intricate landscapes. Nevertheless, a profile such as this report can provide a fairly comprehensive portrait of the overall neighborhood for broader study and reflection, and as a living document it can be continuously updated to reflect changing conditions in the neighborhood and provide a record of changes over time.

Besides its value in assessing assets and needs of the Tenderloin, this report can be a resource in crafting community-based plans and programs to enhance the physical environment and economic vitality of the neighborhood, as was done with the ‘Tenderloin 2000’ report over ten years ago. The easily understandable information not only provides a baseline for community planning efforts, but it can also be linked with commercial leasing data for business attraction strategies, used to analyze specific development projects, and for a variety of other community development efforts.

Urban Solutions encourages the use of the Tenderloin Neighborhood Profile, and our profiles for other neighborhoods, by many different organizations and interested parties, including community development organizations and community organizers, resident and merchant associations, commercial leasing brokers and housing developers, and various city agencies responsible for the health, safety and welfare of the Tenderloin community.

We hope you find this report interesting and useful, and we welcome your comments.
This map is provided as a reference for more detail than is shown on each of the individual maps in the body of the report. The neighborhood is displayed within the context of surrounding districts, and it is important to consider that the “boundaries” of the Tenderloin in reality are not as clearly defined as the boundary lines on these neighborhood maps. This key map also shows the street names throughout the neighborhood as geographic reference points. And finally, this map provides the Census “block group” reference numbers as well as the City Assessor’s block numbers.
Methodology and Census Definitions

Data sources
Field data was collected between April and July 2004 by Urban Solutions staff, interns and volunteers. A customized survey instrument was used that called out 15 separate fields of information to organize surveyor observations. The parcel-level information from these surveys was organized in a Microsoft Access database which was then linked to a GIS data table and mapped in ESRI Arcview 3.2.

Census Bureau data was taken from the US Census 2000 and processed for mapping in Arcview 3.2. Census SF 1 data is representative of the entire population of a region. Maps are either at the census “block” level, which is the finest-grain scale of data reporting that the Census offers, or at the “blockgroup” level which is an aggregate of several Census blocks. Note that Census blocks are not necessarily the same as an Assessor block or a city block as we may think of one empirically.

SF 2 and SF 3 data are generated from a sample of approximately one in six or seven households that is weighted by the Census Bureau to represent the area population. All SF 3 maps are at the blockgroup level, while SF 2 data is reported only at the Census “tract” level, which is the largest sized geographic unit for measuring Census data.

SF 2 data used in this report is for nationalities of the resident population. However this data is only provided for Census tracts where the reporting population is over 100. For example, if only 50 individuals in a Census tract self-identified under the category “Mexican,” then the Census would not report any data for that tract. Therefore, it should be used as an indicator of the general clusterings of nationalities in broader areas, not precise counts of population.

All data from 1970, 1980 and 1990 used in the report tables were culled from Geolytics’ Neighborhood Change Database (NCDB), data originally collected by the US Census Bureau. The 1970-90 data sets were normalized by Geolytics to correspond to 2000 boundaries. Because the U.S. was completely covered by both Census tracts and blocks in both 1990 and 2000, the 1990 data was weighted to use as the basis for normalizing the boundaries. (In 1980, Census tracts only covered urban areas, as well as a few rural areas in certain states. In 1970, tracts covered most urban areas only.) Once the tract weights were computed, they were used to normalize all 1970, 1980, and 1990 NCDB counts to 2000 tract boundaries.

1970 population values for both the individual neighborhood and San Francisco as a whole were equaled to 100%. Any deviation from that value is noted as a percentage of the 1970 value—less than 100 for population decreases and more than 100 for population increases.

Mapping techniques
Data as depicted on the maps in the Demographics section of this report is stratified in a variety of ways to create the ranges of color gradations. This gradation, or shading technique is called a “choropleth map” in formal cartographic terminology. Its name is derived from the Greek words choro (place) and pleth (value). The advantage of this technique is that the map shows different intensities of a color in proportion to the magnitudes, or values, of the data for each particular geographic unit area on the map (typically a Census block or blockgroup).

The data is stratified to create these ranges of color gradations using a few different methods: In some cases “natural breaks” in a data set are used to create three levels of value with three corresponding shades of color (for some maps the data is parsed out into five gradations of color rather than just three). On other maps “equal breaks” are used to divide up a data set in accordance with a range of evenly incremental levels of value. For ease to readers, the break points in the ranges of values were also typically rounded to create more logical break points.

In many cases the data set for a map was parsed out relative to “representative” breaks that are benchmark
values for gauging the implications of the data, for example in setting a middle break in the range of color gradations based on an average for San Francisco citywide statistics (such as the percentage of renters in the city’s overall population). When citywide statistics are too dramatically different to be a useful measure for neighborhood characteristics, these representative breaks are based on averages for the ‘Southeastern Neighborhoods’ quadrant of San Francisco—encompassing the neighborhoods of the Tenderloin, Chinatown, South of Market, the Fillmore, Mission, Potrero Hill and Central Waterfront, Bernal Heights, Bayview and Hunters Point, Visitacion Valley, and Portola and the Excelsior. These neighborhoods have generally comparable demographics characteristics.

Most of the maps in the Demographics section represent data values as percentages, which measure the relative magnitudes, or intensities of the data across the geographic area of the neighborhood. Some maps represent data values with real numbers, which measure absolute magnitudes.

Data depicted on the maps in the Land Use and Economics sections of the report is qualitative information about the characteristics of each particular geographic unit area on the map (typically an individual parcel of property) based on information from the Urban Solutions field surveys. This is not quantitative data measuring a “value.” Classifications for these characteristics and a color palette are used to distinguish different types of data on these maps—for instance, residential land uses distinguished from commercial uses—that are based on conventional classification systems used in planning and economic development analytical methodology. The technique is called a “chorochromatic map” from the Greek words choros (place) and chroma (color), assigning unique colors to differentiate characteristics between places.

Census Definitions
Throughout the “Demographics” section of this report there are descriptions and terms used that are unique to the vocabulary of the U.S. Census. The way these terms are precisely defined is important in understanding the type of data that was collected and what it is telling us about certain demographic characteristics. For example, the term “unemployed” in the Census survey refers to a person who was actively looking for work at the time of the Census survey and able to begin working. As might be expected, such a narrow definition captures a relatively small portion of those people who we intuitively understand to be not working. For this latter status the Census uses the term “not in workforce,” which refers to anyone between the ages of 18 and 65 who, for a variety of possible reasons, is not working.

Given the complexities of some of these definitions which can not be completely explained in the brief annotations accompanying the maps themselves within the main body of this report, the following elaborations are provided for further explanation.

**Latino:** For the 2000 Census, residents who identified with the terms “Hispanic” or “Latino” were those who classified themselves in one of the specific Hispanic or Latino categories listed on the Census surveys—”Mexican,” “Puerto Rican,” or “Cuban”—as well as those who indicated that they are “other Spanish, Hispanic, or Latino.” Origin is viewed as the heritage, nationality group, lineage, or country of birth of the person or the person’s parents or ancestors before their arrival in the United States. People who identify their origin as Spanish, Hispanic, or Latino may be of any race. Thus this term is not mutually exclusive from any of the other three primary ethnicities/races mapped; Census survey respondents may have been counted as African American and Latino, Asian and Latino, White and Latino, or Latino only. For example, a person whose ancestry is from Spain may self-identify as “White” or they might choose to identify themselves as “Latino.” In the previous 1990 Census, the term “Latino” was a self-designated classification for people whose origins are from Spain, the Spanish-speaking countries of Central or South America, the Caribbean, or those identifying themselves generally as Spanish, Spanish-American, etc.

**Linguistically isolated household:** A household is classified as “linguistically isolated” if no household members age 14 years or over speaks only English, and no household members age 14 years or over who speak a language other than English speaks English “very well”. All the members of a linguistically isolated household are tabulated by the Census as linguistically isolated, including members under 14 years old who may speak only English.”
**Per capita income:** Calculated as the mean income computed for every man, woman, and child in a geographic area. It is derived by dividing the total income of all people 15 years old and over in a geographic area by the total population in that area. Note that income is not collected for people under 15 years old even though those people are included in the denominator of per capita income. This measure is rounded to the nearest whole dollar. The per capita income for a Census blockgroup shows the total income earned by every person 15 years of age and older divided by the total population of that blockgroup, including those under the age of 15.

**Household income:** Defined by the Census as the sum of money income received in the calendar year 1999 by all household members 15 years old and over, including household members not related to the householder, people living alone, and other non-family household members. Included in the total are amounts reported separately for wage or salary income; net self-employment income; interest, dividends, or net rental or royalty income or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental Security Income (SSI); public assistance or welfare payments; retirement, survivor, or disability pensions; and all other income.

**Below poverty:** The Census Bureau uses the federal government’s official poverty definition. A person is below poverty if their individual income or total family income was less than the poverty threshold specified for the applicable family size, age of householder, and number of related children under 18 (see table below for poverty level thresholds). The poverty thresholds are updated every year to reflect changes in the Consumer Price Index. The poverty thresholds are the same for all parts of the country — they are not adjusted for regional, state or local variations in the cost of living. The specific thresholds used for tabulation of 1999 income in the 2000 census are shown below.

### Poverty Thresholds in 1999, by Size of Family and Number of Related Children Under 18 Years

<table>
<thead>
<tr>
<th>Size of family unit</th>
<th>Weighted average threshold</th>
<th>Related children under 18 years</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>None</td>
<td>One</td>
</tr>
<tr>
<td>One person (unrelated individual)</td>
<td>8,501</td>
<td></td>
</tr>
<tr>
<td>Under 65 years</td>
<td>8,667</td>
<td>7,990</td>
</tr>
<tr>
<td>65 years and over</td>
<td>8,667</td>
<td>7,990</td>
</tr>
<tr>
<td>Two people</td>
<td>10,869</td>
<td></td>
</tr>
<tr>
<td>Householder under 65 years.................</td>
<td>11,214</td>
<td>11,156</td>
</tr>
<tr>
<td>Headache 65 years and over................</td>
<td>10,075</td>
<td>10,070</td>
</tr>
<tr>
<td>Three people</td>
<td>13,290</td>
<td>13,032</td>
</tr>
<tr>
<td>Four people</td>
<td>17,029</td>
<td>17,184</td>
</tr>
<tr>
<td>Five people</td>
<td>20,127</td>
<td>20,723</td>
</tr>
<tr>
<td>Six people</td>
<td>22,727</td>
<td>23,835</td>
</tr>
<tr>
<td>Seven people</td>
<td>25,912</td>
<td>27,425</td>
</tr>
<tr>
<td>Eight people</td>
<td>28,967</td>
<td>30,673</td>
</tr>
<tr>
<td>Nine people or more</td>
<td>34,417</td>
<td>36,897</td>
</tr>
</tbody>
</table>


**Industry Employment:** The Census uses a number of categories for sectors of employment in population surveys. For purposes of simplified tabulation in this report, the categories were combined as follows:

- Agriculture/Mining - Agriculture, Forestry, Fishing, Hunting, and Mining
- Construction
- Manufacturing
- Wholesale
- Retail - Retail trade, Arts, Entertainment, Recreation, Accommodation, and Food Service
- Transportation/Utilities - Transportation, Warehousing, Utilities
- Professional/Information/Other Services - Information, Professional, Scientific, Management, Administration, Waste Management, and Other Services
- Education/Health/Social Services
- Finance/Insurance/Real Estate
- Public Administration
**Employed:** Defined by the Census as all civilians 16 years old and over who were either (1) “at work” — those who did any work at all during the reference week as paid employees, worked in their own business or profession, worked on their own farm, or worked 15 hours or more as unpaid workers on a family farm or in a family business; or (2) were “with a job but not at work” — those who did not work during the reference week, but who had jobs or businesses from which they were temporarily absent because of illness, bad weather, industrial dispute, vacation, or other personal reasons. Excluded from the employed are people whose only activity consisted of work around their own house (painting, repairing, or own home housework) or unpaid volunteer work for religious, charitable, and similar organizations. Also excluded are all institutionalized people and people on active duty in the United States Armed Forces.

**Unemployed:** All civilians 16 years old and over were classified by the Census as unemployed if they were neither “at work” nor “with a job but not at work” during the reference week, were looking for work during the last 4 weeks, and were available to start a job. Also included as unemployed were civilians 16 years old and over who: did not work at all during the reference week, were on temporary layoff from a job, had been informed that they would be recalled to work within the next 6 months or had been given a date to return to work, and were available to return to work during the reference week, except for temporary illness.

Employment and unemployment estimates from Census 2000 will, in general, differ from the official labor force data collected in the Current Population Survey (CPS) and released by the Bureau of Labor Statistics, because the design and collection methodology of the census and the CPS meet different purposes. Census 2000 was designed to collect general information about the labor force for very small geographic areas on a one-time basis. It was primarily a mail-out/mail-back data collection that asked fewer and less precise questions than the CPS on employment and unemployment. The CPS is specifically designed to produce the official estimates of employment and unemployment for the United States each month. Specifically, at the national level, Census 2000 estimates of employment were considerably below, and estimates of unemployment above, the corresponding CPS estimates. Subnational estimates from the two sources may exhibit even wider relative differences.

**Not in labor force:** Defined by the Census as all people 16 years old and over who are not classified as members of the labor force. This category consists mainly of students, individuals taking care of home or family, retired workers, seasonal workers enumerated in an off-season who were not looking for work, institutionalized people (all institutionalized people are placed in this category regardless of any work activities they may have done in the reference week), and people doing only incidental unpaid family work (fewer than 15 hours during the reference week).

**Gross Rent:** The data on gross rent were obtained from answers to Census long-form questionnaire Items 45a-d, which were asked on a sample basis. Gross rent is the contract rent plus the estimated average monthly cost of utilities (electricity, gas, water and sewer) and fuels (oil, coal, kerosene, wood, etc.) if these are paid by the renter (or paid for the renter by someone else). Gross rent as a percentage of household income in 1999 is a computed ratio of monthly gross rent to monthly household income (total household income in 1999 divided by 12). The ratio is computed separately for each unit and is rounded to the nearest tenth. Units for which no cash rent is paid and units occupied by households that reported no income or a net loss in 1999 comprise the category “Not computed.”

**Family Households:** A family according to the Census includes a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption. This includes common-law marriages but does not include an unmarried-partner (ie, domestic partners) household. An “unmarried partner” can be of the same or of the opposite sex of the householder. An unmarried-partner household may also be a family household, depending on the presence or absence of another person in the household who is related to the householder, such as a child. A family household may contain people not related to the householder, but those people are not included as part of the householder’s family in census tabulations. A household can contain only one family for purposes of census tabulations.
The following maps show a variety of demographic characteristics for the neighborhood using data from the 2000 US Census. The maps show gradations of color representing relative magnitudes of the information being mapped—such as the relative percentages of residents in the neighborhood who are renters. On all these maps, the darker shade of a color is more intense or more dominant, while the lightest shade of the color is the least intense.
Population densities are based on the total number of residents for each Census block. Natural breaks in the data were used to create the five color gradations on the map. The map shows the highest concentrations of people in the center of the neighborhood. By contrast there is relatively low resident population density in the southwest corner around the Civic Center. Note that the northwest corner of the Tenderloin, where there is also a low resident population, is around the tourist hotel district and Union Square.

This table shows that although San Francisco’s total population decreased in the 1970s, the Tenderloin neighborhood’s population slightly increased. Overall, in the last three decades the resident population increased at a greater pace in this neighborhood than for San Francisco as a whole.
In the following series of race population maps the five color gradations correspond to equal breaks in the data for easy comparison between the maps. For Asian and Pacific Islander populations, you can see the greatest concentration in the center of the Tenderloin. This coincides with the area of overall highest population densities in the neighborhood shown on the previous map.

Source: U.S. Census Bureau 2000, SF1 (short form) 

Fig. 2

There is a relatively small African American population in the Tenderloin compared with other main race categories, though it is commensurate with the city’s overall percentage of African American population. This map shows a main concentration in the southeastern portion of the neighborhood, which is also generally within the area of higher population densities.

Source: U.S. Census Bureau 2000, SF1 (short form) 

Fig. 3
Similar to African Americans, there is not a high percentage of Latinos living in the Tenderloin, though it is commensurate with the city’s overall demographic mix. The map shows that this population is clustered primarily in the central-northwest portion of the neighborhood. There is one anomaly in the northeast corner, though the earlier map showed there is very little resident population on this block.

Though white residents are the largest percentage of the Tenderloin population, this map shows an interesting pattern with higher concentrations along the northern and western edges of the neighborhood. Many of these Census blocks have relatively low population densities, as can be seen on the earlier map, but this “donut” pattern of concentration is somewhat opposite from the previous three race maps.
Race Population Change 1980 to 2000

Although this table shows the largest percentage of residents in the Tenderloin are white, that percentage has been steadily decreasing since the 1970s, similar to the trend for San Francisco’s population overall. Conversely, the Latino and Asian/Pacific Islander populations in the Tenderloin, as for the entire city, have steadily increased over the past three decades. The Latino population in the neighborhood in fact is now greater in percentage than it is for San Francisco as a whole, suggesting that the demographic identity of the neighborhood will continue to change. Of note in this table is that while the percentage of African Americans in the city has been steadily decreasing, in the Tenderloin it has increased since the 1970s and appears to have remained relatively stable as other population groups in the neighborhood change more dramatically.

Latino and Asian/Pacific Islander Populations

<table>
<thead>
<tr>
<th>Population</th>
<th>San Francisco</th>
<th>Tenderloin</th>
<th>Percent of SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexican</td>
<td>45,451</td>
<td>3,169</td>
<td>7.0%</td>
</tr>
<tr>
<td>Central American</td>
<td>19,574</td>
<td>251</td>
<td>1.3%</td>
</tr>
<tr>
<td>Chinese</td>
<td>152,653</td>
<td>3,261</td>
<td>2.1%</td>
</tr>
<tr>
<td>Cambodian</td>
<td>169</td>
<td>169</td>
<td>100.0%</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>8,994</td>
<td>1,899</td>
<td>21.1%</td>
</tr>
<tr>
<td>Japanese</td>
<td>9,744</td>
<td>439</td>
<td>4.5%</td>
</tr>
<tr>
<td>Filipino</td>
<td>35,410</td>
<td>2,367</td>
<td>6.7%</td>
</tr>
<tr>
<td>Indian</td>
<td>1,398</td>
<td>636</td>
<td>45.5%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau 2000, SF2 (long form, Tract Level Data) Table 3

The primary race/ethnicity categories used by the Census that are shown on the maps in this report are Asian/Pacific Islander (API), Hispanic (Latino), Black (African American), and White. This table shows more detailed data from the Census for the particular places of origin within the broad categories of API and Latino for residents of the Tenderloin. People who identify with the terms “Hispanic” or “Latino” are those who classified themselves in one of the specific Census 2000 categories such as “Mexican,” “Puerto Rican” or “Cuban,” as well as “other Spanish, Hispanic, or Latino”. Most notable is that over 20 percent of the city’s Vietnamese population lives in the neighborhood, as does 45 percent of the Indian population, though the table shows this is a relatively small part of the city’s overall demographic mix.
Foreign Born - Not U.S. Citizen 2000

The color gradations on this map use representative breaks based on the San Francisco average of 16% foreign born non-citizens as a mid point for the range of data, to allow a comparison of the Tenderloin with the city as a whole. The map shows that across almost all of the neighborhood the percentage of non-citizen resident population is at or above the citywide average. The highest concentration is in the central portion of the neighborhood which previous maps show is the area of overall highest population density.

Foreign Born - Naturalized U.S. Citizen 2000

The San Francisco average of 21% naturalized citizens is used as the mid break point on this map. Again the highest concentration of naturalized citizens is generally towards the center of the Tenderloin, though it is notable that for much of the neighborhood the percentage is lower than the citywide average.
This table shows the percentage of both native-born and foreign-born Tenderloin residents in comparison to San Francisco as a whole, and it is clear that the neighborhood has a significantly high concentration of foreign-born residents, nearly 50 percent of the total local population. Note that the categories of Naturalized and Not U.S. Citizen are sub-sets of the Foreign-Born column in this table. The chart indicates that while the Tenderloin is home to a larger percentage of U.S. immigrants than the average for San Francisco, a higher percentage of those immigrants in the neighborhood have not become, or at least not yet, U.S. citizens. Consider that it often takes many years to gain citizenship status.

This table shows households in the Tenderloin which do not have at least one adult or teenager who speaks English and those households where English is spoken along with Spanish or an Asian or Pacific Islander language. It is clear that there is a higher percentage of “linguistically isolated” households, where English is not spoken, in the Tenderloin than for the rest of San Francisco. Interestingly, only a slightly smaller percentage of households in the Tenderloin are bi-lingual as compared with San Francisco on the whole.
A linguistically isolated Asian/Pacific Islander household is one where no one over the age of 14 speaks English “very well.” The representative data breaks used to create the color gradations for this map center on the Southeastern Neighborhoods average of 11.2%, because the overall San Francisco average was too low to make for a useful point of reference (suggesting that the issue of language isolation is much more relevant to the immigrant and lower-income neighborhoods in this quadrant of the city). This map roughly reflects the earlier API race population map.

The low break for the color gradations on this map is keyed to the Southeastern Neighborhoods average of 4.9%. By comparison, the overall San Francisco average for linguistically isolated Spanish-speaking households is 2.3%. Here we can see there is a relatively high percentage of Spanish language households in a diagonal pattern from the northwest to the southeast corner of the neighborhood. The map is reflective of the relatively modest—but growing—Latino population in the Tenderloin overall.
The Census defines youth as under 18 years of age, adults as those who are 18 to 64, and seniors as 65 and older. This table shows that generally the adult population in the Tenderloin has been fairly stable over the last several decades, but the percentage of senior residents has been steadily declining since the 1970s and is now slightly lower than for the city as a whole. Interesting to note is that the neighborhood’s youth population was rising for several decades through the 1980s, in contrast to the city’s overall diminishing youth population during that period, but then began to decline during the 1990s. This suggests the pattern in the Tenderloin may now be following the general citywide trend of a shrinking population of young people.

### Average Age

The city average age of 38.8 years old was used as a mid break point to create the color gradations on this map. There is a clear distinction in average age between the northern and southern portions of the Tenderloin. Note that the average age for residents was calculated by multiplying the population for each age category — youth, adults, seniors — by the average age for that age category, summing those numbers, then dividing by total population within each Census blockgroup.
The Census defines youth as under 18 years of age. The San Francisco average of 14.5% youth among the city’s total population is used as the mid point for the data. The map shows a high proportion of youth towards the center of the neighborhood. It is interesting to note that when looking at the total numbers of youth in each blockgroup rather than just the percentages, the relatively large population of young people in the northeastern corner of the neighborhood doesn’t register as a high percentage because of the overall large population in that blockgroup.

The Census defines adults as those who are ages 18 to 64. The San Francisco average of 71.8% adults was used as the mid break point to create the color gradations on this map. In marked contrast to the previous map of youth in the Tenderloin, this map shows the adult population more concentrated towards the outside edges of the neighborhood.
The Census defines seniors as those people age 65 and older. The San Francisco average of 13.6% seniors in the total population was again used as the midpoint for this map. This map indicates that for the most part a higher proportion of seniors in the Tenderloin reside in the eastern portion of the neighborhood, which also corresponds to the area of overall highest population density and the area with a high concentration of residential hotels.

The table shows that the Tenderloin generally mirrors the overall city trend of a declining percentage of older residents and a growing percentage of younger and middle-aged adult residents, with 67% of the Tenderloin’s population being adults between the ages of 18 and 54. Note that the percentages for each age category are of the total population, not just the adult population. The table also shows that the neighborhood differs from the city in having attracted more of the young adult age group over the past 40 years, while the overall city population in this age category has been more or less constant.
The average per capita (per person) income for the city’s Southeastern Neighborhoods of $24,999 was used as the mid point for creating the color breaks on this map, as the city’s overall average of roughly $35,000 from the 2000 Census was too high to be a useful gauge for data from the Tenderloin. The map clearly shows that residents with higher per capita income are more concentrated along the western and northern edges of the neighborhood. Note comparisons with other maps of race distribution and employment status.

Household income is the total income received by all household members age 15 and over, including those not related to the primary “householder.” Median (the middle point) household income is shown for each Census blockgroup. Again a more local average was used for the data breaks rather than the much higher citywide median for San Francisco. This map shows that in the Tenderloin household income seems to follow per capita income very closely, which is not always the case.
The first table strikingly shows that a higher proportion of the neighborhood’s adult population is below poverty, compared with San Francisco as a whole. Almost one quarter of the total Tenderloin population is adults between the ages of 18 and 64 living in official poverty. The table on the right compares the neighborhood’s median household income and per capita (per person) income with citywide conditions, and again shows marked differences.
This table shows the highest level of education attained for adults age 25 and over. Someone who has a high school diploma and an undergraduate degree is counted in this Census data under the ‘Bachelors/Graduate’ column but not under the ‘H.S. diploma’ category since the college degree is the person’s highest educational attainment. The table shows that much of the city’s overall adult population, almost half, has at least an undergraduate college degree, while a significantly lower percentage of Tenderloin residents have college degrees. Conversely, a greater portion of the Tenderloin’s adult population has only some or no high school education compared with citywide statistics. Note that the column to the far right in the table is specifically for those aged 16-19 who are neither in high school nor have their diploma. Again, nearly twice the percentage of the neighborhood’s population of this age, compared to the city, falls in this category of education attainment. The separate data chart below the main table is just for Tenderloin residents aged 25 and over and is broken out by the four main Census population races, highlighting some notable differences in education among the neighborhood’s residents.
This map uses the San Francisco city average of about 65% renters as the middle point for the range of five color gradations. The Tenderloin has a 99% renter population, and the map shows this overall renter dominated housing supply. The light area between McAllister and Grove, which skews the otherwise uniform map pattern, is the Civic Center which has essentially no resident population. Other anomalies are a few buildings with condos or areas of non-residential land uses.

This map shows the average percent of their monthly incomes that residents are paying for rent in the neighborhood. The conventional standard of 1/3 of income towards housing costs (rent + utilities) is used as the mid break point. This data indicates that for the most part Tenderloin residents are similar to the broader population relative to this conventional housing cost standard.
Family Households

The Census defines a family as a primary “householder” and at least one other person living in the same household who is related by birth, adoption, or marriage (though not including domestic partners). Therefore a married couple is defined as a “family.” The Southeastern Neighborhoods average of 68.7% family households (using the Census definition) is used as the middle break point. The data shows clearly that the Tenderloin neighborhood has a lower percentage of family households than this region as a whole.

Length of Residency

This map is showing the average number of years residents have lived in their current housing unit. It is important to note that this is not necessarily the same as a person’s total length of residency in the neighborhood if they have moved from one housing location to another. The map is thus somewhat of a proxy for housing stability for residents—whether the population is more transient or more settled. The Southeastern Neighborhoods average of 4 years is used as the middle point for the color gradations.
The table here shows that the Tenderloin has long been a neighborhood of nearly entirely a renter population. It is interesting to note the slight, but continuous, trend for the city as a whole of a declining renter population—from 66.3% in 1980 to 65% by the year 2000.

The chart on the right shows the percentage of Tenderloin renters by the year moved in, and on the left is homeowners. It is important to note that the homeowner population in the neighborhood is minute—a total of 210 residents—so the chart on the left may appear somewhat misleading at first glance. The notable pattern here is that the Tenderloin has a somewhat higher percentage of residents who had been in their housing units for a year or less (at the time of the Census) compared to citywide data and, conversely, a lower percentage of residents who had been in their housing longer than 20 years.
This table shows the number of Tenderloin residents who work within San Francisco, work within the San Francisco ‘Metropolitan Statistical Area’ (MSA) but outside of the city itself, or work in other parts of the Bay Area or even farther away, respectively. The data shows that a very high percentage of Tenderloin residents work in the city, more than 10% higher than the average for San Francisco residents overall — this is not a neighborhood of commuters.

This map looks at the geographic patterns of the data from the above table. The San Francisco average of 76.9% local workers is used as a lower end break. All of the neighborhood is above the overall city average. Subsequent maps also show that the Tenderloin has an extremely low level of vehicle ownership and, conversely, a very high percent of residents using public transportation and walking to get to work, which likely helps to explain why a great majority of Tenderloin residents do not work outside the city.
The Southeastern Neighborhoods average of 0.94 vehicles owned per household is used as the middle point for the range on this map, since the citywide average is too high to be a useful measure. This map shows that with the exception of the southwest portion of the neighborhood, which has a very small resident population, Tenderloin households across the neighborhood have few cars. The total number of vehicles owned is displayed in each Census blockgroup on the map as well.

This table compares vehicle ownership for the Tenderloin and the city as a whole. An astounding 82% of all neighborhood households do not have a car. This compares with slightly over ¼ of San Francisco households overall that are car-free. Note also the even more dramatic relative difference between the Tenderloin and citywide for households with two vehicles.
Average commute times for residents are shown on this map, regardless of the “mode” (e.g., transit, walk, car, etc) used to get to work. The San Francisco average time to work of 31 minutes is used as the middle point for the range of color gradations. The map indicates that residents on the western and northern edges of the neighborhood generally have shorter commute times to work than other Tenderloin residents.

This table supplements the above map by breaking out the neighborhood data into various commute time categories. The data patterns for both San Francisco and the Tenderloin have a similar ‘bell curve’ shape peaking in the 15 to 30 minute range, but on average the Tenderloin resident’s commute time is less than that of the typical San Franciscan. Considering that more than three times as many Tenderloin residents walk to work compared to citywide statistics, as a subsequent map will show, this average shorter commute time is not surprising.
This and the following two maps show patterns for commuting to work by different “modes” of transportation—walking, bicycling, transit, driving. For this map of residents who walk or bicycle to work, natural breaks in the data were used for the color gradations because the statistics on commuting are too varied throughout the city to create a single comparative standard. Even the “low” break on this map represents a much larger percentage of residents relying upon their feet or a bike compared to a citywide average.

The average for the Southeastern Neighborhoods of 32.3% transit use for work commuting is used as the middle break point on this map. Most of the Tenderloin has a very high percentage of transit use. The main 38-Geary bus line runs east-west along the north edge of the neighborhood, Van Ness bus lines run along the western edge, major north-south bus lines run along Stockton Street on the east edge, and the Market Street metro lines and BART run along its southern edge.
Tenderloin residents overall are much less likely to use a vehicle to get to work than other modes of travel. This should come as no surprise for those who know the central-city geography and dense land use patterns of this neighborhood as well as some of the employment and income characteristics of its residents, as shown on previous maps in this report.

Natural breaks in the data were used on this map because the data is highly variable throughout the city. The notable pattern here is the relatively high, for the Tenderloin, percentage of residents along the Polk/Van Ness corridor who drive to work. Comparing this to the numbers of vehicles per household on the earlier map, the dark colors of blue here correlate directly with sheer numbers of vehicle ownership in those Census blockgroups.

This table supplements the previous three maps of patterns of transportation use. The data shows that Tenderloin residents overall are much less likely to use a vehicle to get to work than other modes of travel. This should come as no surprise for those who know the central-city geography and dense land use patterns of this neighborhood as well as some of the employment and income characteristics of its residents, as shown on previous maps in this report.
The maps in the next two sections of this report are based on 2004 field data. This data is provided for each property, or “parcel” in the neighborhood rather than just at the Census block or blockgroup level, which allows for a much more “fine-grained” picture of existing conditions in the neighborhood. The following maps of land use characteristics are also presented in a larger format since there are more colors to decipher than in the previous demographics section.
This map shows the predominant land use type on each parcel in the neighborhood. The most abundant color is yellow, signifying residential buildings. Since a typical building in much of the Tenderloin is a ground floor of retail or other commercial activity with residential units on the upper floors, the map uses red “hash lines” to denote where this kind of mixed commercial/housing land use exists. There are a few clear patterns on this map—the central part of the neighborhood is a concentrated residential and mixed-use area, while the northeast corner of the Tenderloin has a cluster of tourist hotels in proximity to Union Square, and there is a cluster of institutional and government land uses in the southwest corner in proximity to the Civic Center.
Perhaps even more relevant to the everyday experience for residents and visitors in any neighborhood is the types of activities on the ground floor of buildings—here is where we most directly interact with the built forms and functional uses of the urban landscape. This map shows that retail/commercial activities are the predominant land use at the ground floor level. The patterns of pink color help identify cohesive commercial corridors, such as the Larkin Street “Little Saigon” area. There are also many ground floor institutional and public uses in the neighborhood, particularly in the southwest quadrant. The yellow sites on the map indicate that particularly in the north-central portion of the Tenderloin there are many buildings with residential use all the way down to street-level.
This single-theme map makes the patterns of commercial land uses in the neighborhood even more evident. Retail, mixed commercial, hotels, light industrial and office activities are separated out from residential and institutional uses. Here the strong presence of tourist hotels in the northeast corner of the neighborhood near Union Square is clearly noticeable. There is also a notable cluster of retail uses in the southeast portion of the neighborhood around the confluence of Taylor/Turk/Mason/Market streets. Note also the significant number of buildings with multiple types of commercial uses, for example hotel buildings in the Union Square area that have ground floor retail uses.
Rather than a single category of “housing” as a land use, this map breaks out different types of residential uses into subcategories such as apartments, SRO hotels and condos. The most notable pattern on this map is the concentration of SRO hotels in the eastern half of the Tenderloin. This SRO cluster is within a larger constellation of hotel buildings in this area that has characterized the Tenderloin for decades, many of which have been converted to tourist hotels in more recent years as is apparent on the previous map of commercial uses.
It is clear from this map that there is not a uniform scale to the buildings in the Tenderloin—it is a neighborhood of great variety in the sizes and heights of its building stock. This is not uncommon for a neighborhood that was built out long before the advent of “zoning” which dictates heights and building scale in the landscapes of more modern neighborhoods. While there is no sharp pattern on this map, there is a general increase in building heights in the northeastern portion of the neighborhood near Union Square, some of which reflects newer large-scale hotel developments, and generally lower-scale buildings in the northwest area along the Polk and Larkin corridors.
In 1992 after the Loma Prieta earthquake, the City of San Francisco prepared an inventory of all the “unreinforced masonry buildings” (UMBs) that proved to be most vulnerable to damage and safety risks from seismic shaking. The inventory identified over 2,000 buildings citywide, many of which are in the Tenderloin neighborhood, as shown on this map by the small grey dots. The map also shows based on field observations which buildings in the neighborhood have evidence of recent rehabilitation work and where new buildings have been constructed. While this was not a precise engineering or architectural survey by any means, it is notable how many UMBs in the neighborhood appear on surface level to still not have had significant capital investments in structural or aesthetic improvements.
Section 3: Economics

This section provides data on the economic characteristics of the neighborhood. The initial maps show the employment profile for residents, using data from the Census. The subsequent sequence of eight maps based on field data show the patterns of distribution for different types of ground floor businesses in the neighborhood. Note that nearly 20 different business categories were used in the field survey, so these maps were made by combining various business types into more generalized categories. Also note that larger buildings often have more than one business occupant on the ground floor, but the limitations of mapping allows only one use at a time to be shown on the entire parcel.
This table of general employment types for neighborhood residents (both as wage-earners and as business owners) indicates that the largest portion of the Tenderloin’s workers are in the retail sector, far more than the percentage of retail workforce within the overall city population. This may correspond to some extent to the neighborhood’s ubiquitous presence of small retail establishments. The Census categories used here to define “retail” include retail trade, arts, entertainment, recreation, accommodation, and food service. The other large category of workers is in various professional and information-based job sectors, including scientific, management, administrative, and business services. Note that some industrial sectors are not listed here due to the lack of people employed in them.

This is a map of employed Tenderloin residents between the ages of 16 and 64, both as wage-earners and as business owners. The San Francisco overall employment rate of 95.4% at the time of the 2000 Census is used as the upper end for the range of color gradations on this map. With the exception of the one Census blockgroup colored the darkest blue in the northeast corner of the neighborhood, the employment rate in the Tenderloin falls behind the city as a whole.
Adults Unemployed 2000

Unemployed adults are defined by the Census as those people between the ages 16 and 64 who at the time of the 2000 Census were without a job and who were looking for work during the previous 4 weeks and available to start a job. San Francisco’s overall unemployment rate of 4.6% in 2000 was used as the lower end for the range of color gradations (note that the city’s unemployment rate has risen to 5.2% in 2004). The cluster of blockgroups in the southeast portion of the Tenderloin had an average unemployment rate of 11% or more.

Not in Labor Force 2000

The Census defines “not in labor force” as those residents between the ages of 16 and 64 who are unemployed and not seeking work or not in the labor force for various other reasons including students, retirees, homemakers/caregivers, or institutionalized people. Note that this category of the workforce accounts for a large number of people—the San Francisco overall average is 22.4%, which is used as the mid break point for this map. The map shows that the Tenderloin population is generally at or below the city average in this case.
This map shows general retail shops scattered throughout the Tenderloin without a clear concentration other than the small cluster along Market Street in the southeast corner of the neighborhood. Note that the larger parcels that are colored entirely as a place of general retail could have multiple shops with a variety of business types in other units in that same building.

Source: Urban Solutions Field Data 2004  
Fig. 36

**General Retail Businesses**

This map shows that a variety of personal and business services are again scattered throughout the Tenderloin. There are a few notable concentrations, however—the cluster along Market Street; the grouping in the northeast corner near Union Square and the tourist hotels; and the cluster that defines Geary Boulevard between Union Square and Polk Street to the west. Note that the two maps on this page show that many properties have both retail and personal service businesses in the same building.

Source: Urban Solutions Field Data 2004  
Fig. 37

**Personal and Business Services**
While eating and drinking places exist throughout the Tenderloin, this map clearly shows some prominent “corridors” including Larkin Street’s “Little Saigon” area at the western edge of the neighborhood, Geary Boulevard and O’Farrell Street between Larkin and Union Square, and Mason Street at the eastern end of the neighborhood by the tourist district.

There are no super markets within the Tenderloin neighborhood. This map shows the small corner markets and “liquor stores” that are found scattered throughout the neighborhood. Note that in the southwest and northeast corners of the Tenderloin where there is less resident population, around the Civic Center and the tourist hotel zone, respectively, there are very few of these local-serving food and beverage markets.
Very noticeable on this map is the cluster of tourist hotels in the northeast corner of the neighborhood, helping to define the tourist district near Union Square and the theaters. Hotels range from large multi-story buildings taking the entire block, like the Hilton, to small hotels renovated from older residential “SRO” hotels. There is also a smaller cluster on the west side of the neighborhood generally along Polk Street which is likely an extension of the hotels concentrated along nearby Van Ness Avenue.

This map shows a few small pockets of arts and entertainment venues, but no major concentration. Note that there is a small cluster on several parcels near Market Street and Golden Gate Avenue in the southeast part of the neighborhood.
The clustering in and around the Civic Center, especially the larger parcels, can be assumed to be government buildings and offices. The map shows several smaller social service uses spread out through the rest of the Tenderloin, though it is notable that there are none of these uses in the northeast part of the neighborhood near the tourist district and Union Square.

Most of the light industrial and repair uses in the Tenderloin are vehicle and vehicle repair shops. The map shows that they are generally evenly distributed throughout the neighborhood. It is important to note that there is less than one car for every two people in the Tenderloin, so it is likely that many of these repair shops are frequented by residents of the surrounding neighborhoods or commuters into the general downtown area.
The field survey of the Tenderloin revealed a total of 932 businesses or institutions, primarily occupying space on the ground floor of buildings. While the previous series of maps showed the locational patterns for various groupings, the table above provides a tally of the more specific establishment types used in the survey itself. The table shows that the most ubiquitous activities in the neighborhood are eating places. Residents, workers in the area, and visitors are all “fed,” so to speak, by the Tenderloin. There are also a large number of social services establishments and businesses offering personal services, which understandably reflects the dense resident population of the Tenderloin.
Reader’s Notes