Union Square Business Improvement District
Discovery Findings

Presented by J2 — December 18, 2020
Today

- Context/Goals
- Discovery Completed
- Highlights
- Emerging Themes
- Comparative Analysis
- Audience Survey
- Communications Audit
Context/Goals
Goal: Re-establish

Re-establish Union Square as a vibrant, resilient, international retail shopping and hospitality district in a post-COVID world.
Goal: Redefine

Redefine the kind of place Union Square wants to be 10-20 years from now
Goal: Increase Awareness
Goal: Activate Public Spaces
Goal: Differentiate from Competitors
Goal: Increase Foot Traffic and Tourism
Goal: Attract New Businesses
Discovery Completed
Discovery Process

- Creative Brief
- Brand Workshop
- Individual Interviews
- Economic Recovery Task Force Participation
- Independent Research Review
- Audience Survey
- Communications Audit
- Comparative Analysis
In fall 2020, the Union Square Business Improvement District (USBID) convened an Economic & Recovery Task Force, composed of key public and private sector partners, to assist with the development of near-term economic recovery strategies and actions for the district and its stakeholders.
Independent Research

J2 reviewed in depth any previously written reports prepared for or by Union Square to gain a both in-depth understanding and 360 view of institutional knowledge of the Union Square brand.

Documents
- Economic Recovery Task Force Report
- IDA Value of Downtown Union Square Report
- Union Square Annual Report Trimmed 2018-19
- Union Square Public Realm Plan
- USBID Foundation Booklet
- Foundation Strategic Direction Workshop One Sheet
- Affiliate Member One Sheet
- Top 10 lists/Travel Guides

Secondary Topics
- History: A legacy of resilience and change
- Audiences: Tech Transplants vs. San Francisco Locals
- COVID: Tourist traps become locals vacation sport
Highlights of Discovery
Primary Audience
Segments
Primary Audience Segments

- Neighbors / Union Square District Residents
- San Francisco Residents
- Bay Area / Regional Residents
- Tourists
- Property Owners
- Tenants/Business Owners
- Workforce
- Other Influencers
Priorities
- Maintain Union Square as a point of pride, personality and attraction for their city
- A convenient, seamless, safe and clean experience for specific errands
- They don’t want to do something “touristy”
- Unique shopping experience and civic space
- Holiday celebration

What do we want them to do?
- Shop online and pick up in-store
- Rediscovery and eat at restaurants/hidden gems
- Reframe their perception of Union Square as quintessential San Francisco
- Shop, celebrate and explore
- Share positive experiences they have had at Union Square

What we want them to know?
- Not just for tourists
- Being a tourist during COVID is your way of helping our city recover
- You can do everything here
- We are open and there are lots of surprises!

Audience: San Francisco Residents

Findings revealed this audience uses/goes to Union Square for things they can do only in Union Square i.e. visit a doctor, or pick up a specific item. Union Square is not where they spend most of their time and it may not be the first place they think of when they are making plans for an evening out.
Priorities
- Events are significantly more important for this audience
- A place to eat, shop, stay and play and have a “big city” experience without a plane ticket
- Holiday Celebrations
- To feel the trip was worth it

What do we want them to do?
- Plan a trip/book a hotel room
- Plan an evening, buy event tickets, make dinner reservations
- Shop, celebrate and explore
- Share positive experiences they have had at Union Square

What we want them to know?
- Union Square is an easy getaway during COVID
- It’s safer, accessible and more convenient than flying somewhere
- Union Square is full of classic and modern surprises
- The beauty and nostalgia of Union Square can still be found

Audience:
Bay Area / Regional Residents

Bay Area residents who live anywhere from 30 minute drive to 2 hour drive take day trips as well as weekend getaways to experience Union Square as tourists. They are drawn because of the iconic experience, variety of activities, the scale and iconic nature of Union Square in addition to the holiday celebrations.
Audience:
Neighbors/District Residents

Neighbors are a captive audience as they engage with Union Square on a daily basis and patronize the retailers for both necessities, entertainment and recreation. They tend to be more diverse than the San Francisco population on average.

Priorities
- Maintain Union Square as a point of pride, personality and attraction for their city
- A convenient, seamless, safe and clean experience
- They don’t want to do something “touristy”
- What is open?

What we want them to know?
- BID promotes the safety, cleanliness and future vibrance of Union Square
- BID is a hub of resources you can use/follow
- Union Square is full of experiences that can make a fun addition to your day
- The retailers that are open

What do we want them to do?
- Consider intensifying the prioritization of local neighborhood patronage
- Attend events and invite friends to events to begin to socialize Union Square again
- Share positive experiences they have had at Union Square
- Play a role in helping Union Square to be safe and clean
Priorities
- Experience quintessential San Francisco
- Mix fun and business
- Use San Francisco as the hub to the surrounding regional experiences
- Safety and convenience, with friendly experiences
- Take home something special from their travels

What do we want them to do?
- Plan a trip in advance
- Explore the website and learn more
- Recommend Union Square as the must stay neighborhood to friends
- Shop, celebrate and explore
- Share positive experiences they have had at Union Square

What do we want them to know?
- Union Square is an iconic San Francisco Experience
- We are here when you are ready
- Union Square is full of classic and modern surprises
- Safe, clean and convenient
- Start your San Francisco experience at Union Square

Audience:
Tourists

Long stay tourists from destinations around the U.S. and the globe visit San Francisco as a first tier global destination. They often visit Union Square as a bucket list destination during their visit to San Francisco and it may in fact be the centerpiece of their trip.
Audience: Property Owners

Priorities
- Everything is being done to keep Union Square safe, clean and open and is attractive to prospective tenants
- Create and implement communications strategies to keep Union Square front of mind
- Create and implement regular activations for holidays and other events to invite people from the region to engage with Union Square

What we want them to know?
- Union Square is resilient and still a smart investment
- The BID is highly informed, engaged and committed to a healthy and expedient recovery

What do we want them to do?
- Work with the BID to consider how to “Curate” the tenant businesses in Union Square to create the future experience
- Play a role in helping Union Square to be safe and clean
- Activate their network and resources to communicate the positive initiatives and experience of Union Square and its capacity to rebound from the pandemic
- Share positive experiences they have had at Union Square
Audience: Tenants/Business Owners

The owners and managers of businesses such as lifestyle retail, restaurants, services, hospitality, entertainment and others within the Union Square district.

Priorities
- Foot traffic from regional and local residents, tourists and business travelers
- The brand of Union Square to represent and present a world class destination
- Everything is being done to keep Union Square safe, clean and open
- Differentiation of the experience at Union Square through brand and messaging

What we want them to know?
- Union Square is resilient and still a smart investment
- The BID is highly informed, engaged and committed to a healthy and expedient recovery

What do we want them to do?
- Work with the BID to consider how to “Curate” business in Union Square to create the future experience
- Play a role in helping Union Square to be safe and clean
- Activate their network and resources to communicate the positive initiatives and experience of Union Square and its capacity to rebound
- Share positive experiences they have had a Union Square
- Keep their business located at Union Square
- Collaborate with BID to create unique offerings to attract customers.
Audience: Workforce

Priorities
- They want to feel safe commuting to and being at work
- They want to be proud of the neighborhood they work in.
- They want convenient and affordable options for food during lunch hours/breaks.
- They want affordable and fun options for food and entertainment after work.

What we want them to know?
- They can get their shopping done at Union Square
- Acting like a tourist at Union Square can be fun
- You can do everything here
- What is open

What do we want them to do?
- Patronize Union Square businesses
- Play a role in helping Union Square to be safe and clean
- Become brand ambassadors by Inviting others to come and socialize with them in Union Square

Those who work in Union Square are a captive audience in similar ways to residents, as they engage with the assets and services on a daily basis.
Press, the City, politicians, community partners, travel agents and others have varied perceptions of Union Square but understand the civic, economic and brand value of this precious place.

**Audience:** Other Influencers

**What we want them to know?**
- Union Square plays a positive role in the development of the constituents/communities
- Union Square can influence the future of San Francisco
- Acting like a tourist at Union Square can be fun
- We are open and there are lots of surprises

**Priorities**
- The value of services and experiential and economic impact on the City
- A good story, politicians want what’s good for their constituents, community partners want what’s good for their organizations
- Updates and information about how Union Square is managing the current challenges

**What do we want them to do?**
- Invest in and advocate for Union Square and its preservation and development
- Patronize Union Square businesses
- Activate their network and resources to communicate the positive initiatives and experience of Union Square and its capacity to rebound from the pandemic
- Share positive experiences they have had in Union Square
- Become brand ambassadors by inviting others to come and socialize with them in Union Square
Strengths

The strengths expressed by the participants in the discovery process present the positive attributes of Union Square and in some cases the BID.
Strengths

- Location
- Multifaceted Experience
- The Centerpiece
- Economic Impact
- Shopping District
- History
- Diversity
- Public Space and Activations
- Global Brand Recognition
- Union Square Business Improvement District
Strength: Location

- Adjacent to many key neighborhoods and attractions in the city
- Serves as a great starting point for visitors due to its access to public transportation and the diversity of neighborhood experiences within walking distance
- Many residents pass through Union Square making it easily accessible and a convenient shopping and after work experience
Strength:
Multifaceted Experience

- History and civic value as a gathering place
- Classic and contemporary hotels, restaurants, bars
- Theatre district and entertainment variety
- World-class shopping
- Celebrations, art, people watching
- Live Work Play environment is dynamic
Strength:
The Centerpiece

- Centerpiece that stands for the values of the city: resilience, creativity and the arts, civic duty and pride, celebration and quality.
- Often the front door of San Francisco for many people
- The front door of SF with a friendly welcome
- Nostalgia here where many memories were born
Strength: Economic Impact

“Union Square is made up of less than 1% of the City’s built land area, yet generates over one-third (34%) of citywide sales in general consumer goods!” — USBID Economic Impact Study

The district strives to be an equitable and accessible center city for households at varying income and employment levels.” — IDA Report
Strength: Shopping District

- Recognition as a global, unique, luxury shopping destination
- Diversity of shopping experiences that meets the desires of residents and tourists
- A grand big city destination like no other
Strength:
History

- The origin of Union Square is one of civic activation dedicated in 1850
- Stood the test of time and sits as a landmark to the birth of the city and expression of civic values
- Remains an icon of San Francisco beloved by residents and travelers
Strength: Diversity

- Boasts diversity in its workforce, residential population across household income and racial representation.
- Represents a more diverse district than most in San Francisco and is appreciated for such by residents.
Strength:
Public Space & Activations

- Union Square is a place where things happen
- Ongoing outdoor public placemaking projects
- Innovative use of the square and surrounding spaces for events, art, gathering and celebrations
- A canvas of opportunities
- A powerful asset in attracting people during COVID and providing a safe and engaging place for residents
Strength: Global Brand Recognition

- Union Square has earned and retained valuable recognition as a global brand and attractor to the City
- Provides a highlight to San Francisco as a hub for international tourism
- Asset is a significant way supports the economic impact of Union Square and its affection from residents
Strength:
Union Square Business Improvement District

- Responsible and dedicated to a solid and responsive infrastructure
- Ensures the safety and cleanliness of the district,
- Focused on supporting and activating a vibrant destination that attracts
- Facilitator of the various stakeholders, ensuring people are heard, ideas are considered and strategies are implemented
Challenges: COVID Related
Challenges: COVID Related

- Aversion to Public Spaces & Crowds
- Drop in Tourism
- Vacancies
- Fear of Public Transit
- Shuttered Local Economy
- Changing Real Estate Market
Challenge: Aversion to Public Spaces & Crowds

“Union Square in most minds is probably still the ‘busy downtown’ which is the last place they want to be during COVID.”

— Interviewee

The Audience Survey as expected showed a significant drop in frequency of visits during COVID.
Challenge: Drop in Tourism

“Nearly half of the hotel rooms in the city are now temporarily closed, and occupancy in September was down 86% from September 2019.”

— According to San Francisco Travel
Challenge: Vacancies

- Rates in the district are severely down with uncertainty of who will return
- Many storefronts are boarded creating the visual reality of closures and detract substantially from the Union Square experience
- Activating the physical space within these constraints to allow for installations that feel welcoming and positive can combat the blight
Challenge: Fear of Public Transit

“Downtown San Francisco has seen a marked decrease in commuters, as reflected by a steep decline in transit ridership since the beginning of March.”
— Economic Recovery Task Force Report

As of late September, BART ridership was down over 88% as compared to the same time last year.
Challenge: Shuttered Local Economy

“San Francisco reported a loss of roughly 175,000 jobs in April 2020 as compared to March 2020.”

— Economic Recovery Task Force Report
Challenge: Changing Real Estate Market

- Previously high rents pre-COVID determined the mix of businesses in the district
- With market shifting, property owners must decide whether to stay vacant and wait for the right business, or to charge less rent and allow a new crop of businesses to emerge
- Dangers and opportunities inherent in both
- Future mix of retail will define the future of Union Square
Challenges:
Non-COVID Related
Challenges: Non-COVID Related

- Changing Climate for Retail Curation
- Loss of Identity
- Competition
- Cleanliness & Safety
- Competition for Attention
- Audience Segmentation
- Tourist-y Perception
- Traffic & Parking
Challenge: Changing Climate for Retail Curation

- Stakeholders vary on their view of the right mix of retail experiences that should be represented in Union Square.
- Keep the district upscale, despite potential public affinity for more innovative, quirky and controversial retail offerings like the Museum of Ice Cream or a marijuana dispensary?
Challenge:
Loss of Identity

- Common introspective questions about Union Square are “What are we?”, “What do we stand for?” “What is our brand now?”, “What do we want it to be?”

“Has Union Square lost its luster?”
Challenge: Competition

- Core competition on a local level are the malls that can offer the same retail with convenience and perception of being safer.
- Younger audience in the Bay Area is neighborhood focused in its shopping
- Convenience of proximity, parking without confronting those experiencing homelessness creates additional resistance

With that said, Union Square is one of a kind and presents experiences that cannot be found elsewhere in the region!
Challenge: Cleanliness & Safety

- Many residents feel that Union Square may not be clean and safe
- The challenge of being in proximity of an economically challenged neighborhood where the conditions of homelessness exist is real
- New brand can communicate a level of confidence about safety and BID initiatives to minimize the negative perception
Challenge: Competition for Attention

- A steady stream of messaging calling for people's attention, support, time and money is upon us daily, how to cut through the clutter?
- A smart, clear, bold, authentic brand that presents the unique differentiators of Union Square and how it will make a difference in your life
- Visual identity must capture people's attention and remain in their memory
Challenge: Audience Segmentation

- The diversity of people that represent the "customers" of Union Square present a challenge in responding to their multiple priorities and attractors.
Challenge:
Tourist-y perception

- Union Square is considered for many to be “Where all the tourists go”, making it seem “Uncool”
- But, being a tourist in your own city can be fun.
- Brand could reframe the perception of “touristy” from uncool to a place to where “locals play tourist”
Challenge:
Traffic & Parking

- Visitors are deterred by the amount of traffic and lack of parking, especially following COVID
- This makes other nearby shopping centers a more logical choice
- This is an operational challenge but brand messaging can make the perceived inconvenience worth the while
Emerging Themes

The emerging themes that follow are the foundation of the big stories to be told. They are inextricably connected and work together to define the brand of Union Square. The what we stand for, the total experience that is “only here”.

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The Heart of San Francisco
The Heart of San Francisco

“From landmark architecture to flagship shopping, Union Square is the heart of San Francisco’s most imaginative district.”
The Heart of San Francisco

Union Square was born in 1850 as San Francisco was incorporated as a city and for generations has been the center of civic values, pride, culture, entertainment, social gathering and tourism.
The Heart of San Francisco

An example of resilience and adaptation, residents of San Francisco rely on the exponential economic impact that Union Square delivers as an iconic destination with global brand recognition and a gateway to the San Francisco experience.
The Heart of San Francisco

Union Square is a logistical center in which local and commuter transportation passes through providing convenient connection to many Bay Area neighborhoods and destinations. A hub and spoke location where tourists can get their footing as a central path of travel.
2
It’s All Here
It’s All Here

It is a vibrant destination for those with a plan, and is an adventure for those who wander.
There are few places in the world that offer a convergence of activities that tap all the senses.
Feel the grandness and spirit of the square to gather and celebrate. Feel the adrenaline rush from shopping the big brands and the fantasy of escape at the theatre. Here the joy of being with people is front stage; restaurants, bars and hotels.
Everyone is here.
It is quintessentially urban and balances the dynamics of luxury experiences and city life. There are hidden gems to be found, art along the way and serendipity around the corner.
It’s All Here

We are authentically and unapologetically Union Square, ageless, polished, quirky and creative; 180 years in the making.
3

Civic Value/
Public Space
Civic Value/ Public Space

Our history as a place that advocates for change is exhibited in the idea of the Square.
Civic Value/ Public Space

Events and activation are at the center of what Union Square stands for with 170 outdoor activities each year.
Civic Value/ Public Space

With two plazas and four acres of open space Union Square provides the opportunity for residents and visitors to engage, congregate, advocate and celebrate. Our green space provides a healthy outdoor experience for all.
Getting Local
Getting Local

So, Isn’t Union Square for tourists?
Getting Local

So, Isn’t Union Square for tourists?
Of course. But aren’t we all tourists looking for a good time, to meet with people, explore a neighborhood, engage with open space, find a new spot, or check out some art and culture?
The idea of “think global and act local” is the idea of embracing the world but acting like a community. Union Square is global, but to those who live and work in San Francisco it’s a neighborhood.
The strategy of Getting Local is to shift the narrative of Union Square and act like a neighborhood. Be part of the weekly lives of the communities that surround the Square. Get to know them, give them what they are looking for..and make it their Union Square.
Looking Forward
Union Square is uniquely positioned to take a leadership role in helping residents envision the future,
Looking Forward

Union Square is uniquely positioned to take a leadership role in helping residents envision the future, to anticipate it’s coming in a way that is optimistic, hopeful and full of possibilities. Resilience is a strength of Union Square after 180 years of trials and triumphs.
Looking Forward

This place has been an anchor for the City and has adapted and found its way through it all. While many residents may not engage with Union Square regularly, what would they feel if asked the question “What if Union Square was no longer here?”
Looking Forward

Take the lead and create a message for Union Square that people can get behind and begin to look forward.
The Heart of San Francisco
It’s All Here
Civic Value
Getting Local
Looking Forward
Supporting Discovery Reports
Comparative Analysis
Comparative Analysis

A thorough review of 5 benchmark “like organizations” chosen by the Union Square team. This revealed best practices and opportunities for visual identity, messaging, website, digital communications and more.
Downtown Long Beach Alliance
Their brand identity is very dated, lacks visual impact and doesn’t match the beach vibe/environment of Long Beach.

Downtown Santa Monica
Their brand is consistent, matches the environment, and has a diversity of modes for various applications.

East Cut
The East Cut brand is fresh, strong, iconic, diverse, and flexible. It feels both creative and structured which strikes a good balance for their different audiences.

Chicago Loop Alliance
The brand is used consistently, however it lacks personality and feels overall more non-profit/civic-focused.

Times Square
The brand identity matches the energy of the place but doesn’t feel timeless, its too trendy and not necessarily the right trend.
Consistency
Consistent applications of brand elements is essential for both internal and external purposes. A strong set of brand guidelines and internal brand managers will be important for the Union Square team.

Flexibility
The brands with a diversity of elements and assets to play with come across as more vibrant and engaging. Assigning modes within the Union Square identity will help multiple audiences identify with the brand.

Authenticity
The brands that are reflective of their location and environment are stronger and feel more genuine, thus communicate more clearly with different audiences. Striking the right vibe for Union Square is an important goal for the branding process and begins with the Brand Platform, Personality and Tone.
Downtown Long Beach Alliance
Their public messaging plays up the idea of being quirky and diverse, however the brand identity doesn’t feel that way therefore there is a disconnect between visuals and message.

Downtown Santa Monica
Their messaging is hopeful, positive, and consistent and with their visual brand essence, therefore feeling like a cohesive system.

East Cut
The East Cut tagline “Modern Edge” matches the visual identity, but other messaging is clearly more functional and BID focused, which has its pros and cons from a cohesion perspective.

Chicago Loop Alliance
Their public facing messaging leans into the concept of neighborhood and home, however it comes across as generic and forced. They also use the same message over and over, which adds to the generic feel.

Times Square
The language is playful and consistent, but feels generic, however given the international audience and lack of “neighborhood ownership” this is probably appropriate.
Messaging

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Key Takeaways

Keep it Short
Brands with too many messages or words to describe key topics and actions overwhelm audiences. Union Square will need good headlines, banks, and copywriting tools to utilize across multiple channels.

Keep it Honest
The concept of authenticity is king here as well. Public messaging not only needs to match the vibe of the brand, but also the voice of the people behind it. Union Square’s new Brand Platform will help to define the unique voices they have, and when to use them.

It’s ok to Demonstrate your Civic Value
DTLBA’s language articulates their value to the community front and center on their website. As we uncover the Emerging Themes and pillars for Union Square, we will determine where their own message of civic value should be communicated.
Website

Downtown Long Beach Alliance
The navigation feels too conceptual, it’s hard to understand what it is or where to look for key information. Brand is consistent but the site lacks engaging headline image pairing.

Downtown Santa Monica
The navigation is very simple, almost too simple, the Events dropdown needs to hold too much. The proportions of content vary too greatly to follow a clear hierarchy of message, but it the energy in the images and graphics pulls you in.

East Cut
The navigation is clear but and focused, and seems very focused on key audiences. The Explore content lacks and imagery, functions more as a list of shops.

Chicago Loop Alliance
Navigation is very clear and focuses on the different audience actions. There is an abundance of content however it feels distracting and busy, too much motion.

Times Square
The navigation is strong and diverse however the position of the menu paired with overwhelming graphics and content makes the site feel unusable.
Key Takeaways

**Strong Navigation**
Websites with clear and concise navigation help to not only tell the bigger brand story, but can help the many audiences get to where they need to be faster. Union Square can address their challenge of Audience Segmentation with a deep dive into their users and the key experiences and actions we want them to have on their website.

**Priority of Content**
The brands with loud or busy homepages make an unaccessible first impression. Through additional discovery, Union Square can prioritize their messages and present them in a clear hierarchy for audiences that engages rather than overwhelms.
Social/Digital

Downtown Long Beach Alliance
Content feels celebratory, focuses on events, makes frequent posts

Downtown Santa Monica
Strong content, clear community vibe, branding feels inconsistent though... their Instagram is strong.

East Cut
Strong content, imagery, much more engaging than the website. (This makes sense right?)

Chicago Loop Alliance
Good use of videos and imagery, content is consistent with their civic minded vibe, just doesn’t feel very compelling overall

Times Square
Consistent visual experience, good diversity of images but feels scattered and busy
Social/Digital

Key Takeaways

Utilize Social Media for its Unique Value
Best practices show that brands should consider the demographics and audiences for each of their social channels and push out unique content across each. For example, Instagram for photos, shopping and tenant highlights, Twitter for news and civic topics and Facebook for events.

Maintain Quality Control Across All Channels
The brands with the most successful social presences use their identity consistently. A kit of templates for Event graphics, Images etc. will be key to supporting Union Square's consistency at launch.

Create Compelling Video Content
There is a huge opportunity for Union Square to differentiate with video. Out of the 5 brands reviewed, only the Loop maximizes their video usage. Union Square's videos and Instagram stories can be pushed out to enhance the overall brand experience online.
Placemaking

Downtown Long Beach Alliance
Not much placemaking documented, which is reflective of the lack of sophistication within the brand.

Downtown Santa Monica
Their murals and public art did get them recognized in national press.

East Cut
The East Cut has strong branding in place i.e. Lamp Banners and construction wraps.

Chicago Loop Alliance
The Loop understands the importance of activating dead space to promote activity.

Times Square
Their placemaking is legendary and transforms the way tourists enjoy the space.
Placemaking

Key Takeaways

Turn Blight into Billboards

Union Square can look to empty retail or construction as an opportunity to promote the new brand and affirm brand messages to their audiences.

The Place to Be

The Audience Survey shows that people like to watch people at Union Square. Building off of their strong placemaking history, Union Square can continue to uncover additional activations and installations that will bring joy to their audiences and bring their story to the nation through press.
Comparative Analysis:
Downtown Long Beach Alliance
Downtown Long Beach Alliance: Summary

Large US Cities
Long Beach, California

Audiences
Business Owners, Residents, Tourists

Space Usage
Tourism, Recreation, Residential, Office, Retail

Category
Alliance

Promoted Features
Do Business, Visit, Invest,

COVID Messaging
Yes - “We’re all in this together” (webpage) - Links to support businesses, Twitter integration for updates + COVID update info + Resource links for businesses, residents, tourists etc.
The brand application is consistent but feels very dated and doesn’t seem to reflect the environment of Long Beach.
Mission Statement
“Our mission is to cultivate, preserve and promote a healthy, safe and prosperous Downtown.”

1.38 Un-Square Miles
Nothing about DTLB is typical.

“We’re all in this together”

“Downtown feels different”

“Streets that mean more”
Downtown Long Beach Alliance: Messaging

The brand messaging plays into the idea that Long Beach is quirky, however the brand itself doesn’t feel that way. There is an overall disconnect behind what they say and how they present Long Beach.
Downtown Long Beach Alliance: Website

The navigation is too conceptual and vague. It is unclear what to click on for what, and the balance of message and image throughout feels less engaging and hard to connect with.
Downtown Long Beach Alliance: Social Media
Downtown Long Beach Alliance uses Instagram to promote businesses while using Twitter/Facebook to feature Covid information, civic engagement and events.
Downtown Long Beach Alliance uses Instagram to promote businesses while using Twitter/Facebook to feature Covid information, civic engagement and events.
Linkedin posts content that is relevant for their business focused audiences, which does tend to copy content they post on Facebook / Twitter.
Downtown Long Beach Alliance: Video

Downtown Long Beach Alliance is using video as a tool for COVID announcements and commentary on issues like Dining. Despite their recent efforts using videos, engagement is very low.
Downtown Long Beach Alliance: Placemaking

Branding is consistent but there is no notable activations or installations discovered.
Comparative Analysis: Downtown Santa Monica
Downtown Santa Monica: Visual Identity

Large US Cities
Santa Monica, California

Audiences
Business Owners, Residents, Tourists

Space Usage
Tourism, Recreation, Residential, Office, Retail

Category
Alliance

Must-see Attractions
Santa Monica Pier

Promoted Features
Visit, Events, Do Business

COVID Messaging
-Yes - Here
Downtown Santa Monica: Visual Identity

The brand elements, pastel colors and sunny energy represent the identity of Santa Monica, and The BID is consistent with their use of the brand.
Downtown Santa Monica: Messaging

Their COVID messaging is very on brand – making it feel bright and happy despite the grim nature of the message and the fact that it makes socializing nonexistent.
Downtown Santa Monica: Messaging

Mission Statement
The mission of DTSM, Inc. is to work with the city of Santa Monica to promote economic stability, growth and community life within Downtown Santa Monica through responsible planning, development, management and coordination of programs, projects and services designed to benefit the community as a whole, which includes downtown businesses, property owners, residents & visitors.

Find Your Space
Under the Sun
COVID Messaging
Downtown Santa Monica: Website

The website incorporates colorful illustration & design with less text, however with less UX categories and hierarchy the navigation feels to overly simplified.
Downtown Santa Monica: Blog

Their blog focuses on many messages related to COVID. Brand is consistent and messaging matches the tone of content.
Downtown Santa Monica: Social Media+

#WeAreSantaMonica
@DTSantaMonica (IG)
@DowntownSantaMonica
#DTSantaMonica

Facebook
~17K followers /likes

Instagram
8.2K followers

Twitter
13.3K followers
Downtown Santa Monica: Social Media+

- Social features post of the day type content with a COVID focus + highlights locals.
Downtown Santa Monica made the NY Times for community group’s graffiti mural painting of boarded up stores.
East Cut: Summary

Large US Cities
San Francisco, CA

Audiences
Business Owners, Residents, Community Orgs

Space Usage
Homes, offices, restaurants and retail.

Category
Community Benefit District

Must-see Attractions
No

Promoted Features
Food + Groceries, Fitness, Medical + Health Services, Community Events, Cleaning + Safety Services

Covid Messaging
Light messaging on social

Unique Sell/Differentiators
Neighborhood has redeveloped, most dense concentration of new home construction in the Bay Area, and the creation of thousands of new jobs.
The East Cut brand is cohesive and flexible with many diverse opportunities for illustration and topography and feels reflective of the neighborhood.
About Us

The East Cut is San Francisco’s fastest-growing and most exciting new neighborhood. For years prior to its rebirth, our area was lumped in with SOMA, South Park, South Beach, the Financial District, or the Embarcadero. But as our neighborhood has redeveloped and come into its own, residents, businesses, and community organizations are embracing a new identity to distinguish our home from the rest of the City.

“San Francisco’s Modern Edge”
East Cut: Messaging

The tagline “Modern Edge” matches the visual brand essence, however the other language leans more into function and business.
The website is simple and clearly focused on more of the BID content and experience. The site lacks imagery and energy for a visitor experience.
East Cut: Social Media

@theeastcut
#theeastcut
#eastcut
#eastcuteats

Facebook
651 likes

Instagram
1,393 followers

Twitter
589 followers
East Cut: Social Media

East Cut social channels are much more vibrant than the website, they feel active and engaging overall.
East Cut: Digital Communications

Overall impression is organized and professional, yet retains a playful edge through custom illustrations.
East Cut: Placemaking

Construction barriers and empty retail are activated with strong graphics and messaging which brings a vibrancy to the streetscape.
Comparative Analysis: Chicago Loop Alliance
### Chicago Loop Alliance: Summary

<table>
<thead>
<tr>
<th>Location</th>
<th>Chicago, Illinois</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audiences</td>
<td>Business Owners, Residents, Tourists</td>
</tr>
<tr>
<td>Space Usage</td>
<td>Tourism, Recreation, Residential, Office, Retail</td>
</tr>
<tr>
<td>Category</td>
<td>Alliance</td>
</tr>
<tr>
<td>Must-see Attractions</td>
<td>Cloud Gate Pre-COVID - ACTIVATE Post COVID - Drive-in Opera(?)</td>
</tr>
<tr>
<td>Promoted Features</td>
<td>Dining, Shopping, Tours + Attractions, Museums, Walking, Hotels/Hospitality</td>
</tr>
<tr>
<td>Covid Messaging</td>
<td>Yes - What’s Open + Ongoing Advisory + “How to access arts and culture during COVID”</td>
</tr>
</tbody>
</table>
Chicago Loop Alliance: Visual Identity

Overall consistent use of brand, though comes across as dated and more civic-focused in tone.
Chicago Loop Alliance: Messaging

About
Chicago Loop Alliance creates, manages, and promotes positive and inclusive programs that attract people to the Loop and accelerate economic recovery.

“Welcome to the loop, Chicago’s official downtown and everyone’s neighborhood”

“Everyone’s Neighborhood”

#BackInTheLoop

#InTheLoopCHI
Chicago Loop Alliance: Messaging

Messaging is focused on neighborhood and home, but feels generic in presentation and inauthentic.
Chicago Loop Alliance: Website

loopchicago.com

There is a clear messaging hierarchy for each audience, and civic resources are well integrated throughout. The visual presentation, though dynamic, feels busy and hard to follow.
Chicago Loop Alliance: Social Media

@LoopChicago
#InTheLoopChi
#BackInTheLoop

Facebook
~22k followers /likes

Instagram
12.8K followers

Twitter
5.9K followers

LinkedIn
2,614 followers

Youtube
50 followers
206K Views on most popular video
Chicago Loop Alliance: Social Media Content

The Loop uses Facebook to promote events and business. Some of the posts are pointing to the more interesting adaptations arts and culture is making during COVID. Other content is basic, “thrillist” type posts that get less engagement.
Chicago Loop Alliance: Social Media Content

Instagram account focuses on imagery of place, though images lack a cohesive tone.
Chicago Loop Alliance: Social Media Content

LinkedIn duplicates Facebook content, but also includes some more high level government/professional messaging. The LinkedIn page description is also clearly more professionally focused despite the sharing of similar content.
Chicago Loop Alliance: Video

The Loop differentiates itself with relatively high quality / production videography. It’s most recent “Everybody’s Neighborhood” campaign has over 200K views on Youtube.
Chicago Loop Alliance: Placemaking

CLA placemaking worked to make dead spaces come to life by creating new opportunity for public gathering via tables on previously deserted street medians, public art and sculptures and cultural relevant events.

After COVID, art and music events are not happening and the only placemaking to speak of is the installation of portable toilets for the homeless - an eerie shift despite a nice story.

CLA has tried to brand the space as “Everybody’s Neighborhood” in a reaction to COVID and has placed some this messaging around the BID.
Comparative Analysis: Times Square
<table>
<thead>
<tr>
<th>Times Square: Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Large US Cities</strong></td>
</tr>
<tr>
<td>New York City, New York</td>
</tr>
<tr>
<td><strong>Audiences</strong></td>
</tr>
<tr>
<td>Business Owners, Residents, Tourists</td>
</tr>
<tr>
<td><strong>Space Usage</strong></td>
</tr>
<tr>
<td>Residential, Office, Retail</td>
</tr>
<tr>
<td><strong>Category</strong></td>
</tr>
<tr>
<td>Alliance</td>
</tr>
<tr>
<td><strong>Must-see Attractions</strong></td>
</tr>
<tr>
<td>The Square is iconic in American culture</td>
</tr>
<tr>
<td><strong>Promoted Features</strong></td>
</tr>
<tr>
<td>Shopping, Dining, Entertainment (+Broadway), Hotels, Residence, Public Art</td>
</tr>
<tr>
<td><strong>Covid Messaging</strong></td>
</tr>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>
Times Square: Visual Identity

The Times Square brand is consistent and memorable, and reflects the energy of the environment. It lacks sophistication however, and does not feel timeless, it feels too trendy.
Mission Statement
The Times Square Alliance works to improve and promote Times Square—cultivating the creativity, energy and edge that have made the area an icon of entertainment, culture and urban life for over a century.

Love in Times Square
Taste of Times Square
Solstice in Times Square

---

Times Square: Messaging
Messaging is consistent and playful, with quippy web copy. The “___ in Times Square” campaign feels expected and generic, but given the international audience this may be intentional.
Times Square: Website

They know their audience - tourists. No focus on “meetings” or “public realm” etc. on homepage. The navigation is strong and representative of the brand, but the visual clutter of the site makes it inaccessible.
## Times Square: Social Media

<table>
<thead>
<tr>
<th>Platform</th>
<th>@TimesSquareNYC</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>#ExploringTimesSquare</td>
<td>238,800 followers</td>
</tr>
<tr>
<td>Facebook</td>
<td>1,494,659 followers /</td>
<td>LinkedIn</td>
</tr>
<tr>
<td></td>
<td>1,501,568 likes</td>
<td>4,153 followers</td>
</tr>
<tr>
<td>Instagram</td>
<td>385,000 followers</td>
<td>Pinterest</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2,666 followers</td>
</tr>
<tr>
<td>Youtube</td>
<td></td>
<td>Youtube</td>
</tr>
<tr>
<td></td>
<td></td>
<td>16,100 followers</td>
</tr>
<tr>
<td>Flickr</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>257 followers</td>
</tr>
</tbody>
</table>
Times Square: Social Media

Times Square has a very well curated social presence, with a consistent post quality.
Times Square: Placemaking

Times Square’s placemaking achievements are legendary, transforming the way tourists and New Yorkers could enjoy the space.
Audience Survey
Survey Goals

- Understand the reason audiences come/visit
- Understand what audiences believe the essence of Union Square is.
- Understand Audience Perceptions of Union Square and Barriers to use Pre and Post COVID
- Understand the best communication channels to reach audiences.
- Understand if/how any of the above topics significantly differ based on demographics.
Survey Methodology

- Created survey capturing audience perceptions and demographic data in SurveyMonkey
- Survey Monkey link was distributed online across social media and newsletter, an incentive was included to encourage participation
- In total, 178 survey responses were collected
- Response data was analyzed and graphed using Survey Monkey
Perceptions Overall
### Q1: What’s your affiliation with Union Square?

<table>
<thead>
<tr>
<th>Affiliation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SF Resident</td>
<td>32%</td>
</tr>
<tr>
<td>Bay Area Resident</td>
<td>21%</td>
</tr>
<tr>
<td>Neighbor</td>
<td>10%</td>
</tr>
<tr>
<td>Worker</td>
<td>10%</td>
</tr>
<tr>
<td>Tourist</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
<tr>
<td>Business Owner</td>
<td>6%</td>
</tr>
<tr>
<td>BID Member</td>
<td>2%</td>
</tr>
<tr>
<td>BID Affiliate</td>
<td>2%</td>
</tr>
</tbody>
</table>
Q2: If Union Square was a person, what are 3 personality traits you would use to describe them?

Most Common Responses:

- Fun
- Lively
- Friendly
- Trendy
- Busy
Q3:
Based on your experience of Union Square, what did you find most exciting?

Most Common Responses:
Shopping*
Christmas*
People*
Restaurants
Events
Q4:
In one word, what makes Union Square unique?

Most Common Responses:
Diversity
Location
History
Shopping
Atmosphere

*Like words i.e. “Diverse” & “Diversity” were combined for the final total*
Q5: What are the top 3 “hidden gems” of Union Square?

Most Common Responses:

Maiden Lane Shops
Restaurants
Q6: What are the top reasons you don’t visit Union Square?

Most Common Responses:

- Homeless
- Parking
- Crowds/C-19
- Expensive
- Traffic

*Like words i.e. “Homeless” & “Homeless people” were combined for the final total
Before + After COVID
Q7: Before COVID how often did you visit Union Square?

75% Visited once or more a month
Q15: Since the onset of COVID, how often did you visit Union Square?

46% Visited once or more a month
Q8: Before COVID, why did you visit?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Routine</td>
<td>40%</td>
</tr>
<tr>
<td>Tourism</td>
<td>14%</td>
</tr>
<tr>
<td>Shopping</td>
<td>66%</td>
</tr>
<tr>
<td>Dining</td>
<td>57%</td>
</tr>
<tr>
<td>Events</td>
<td>50%</td>
</tr>
<tr>
<td>Attractions/Art</td>
<td>31%</td>
</tr>
<tr>
<td>Recreation</td>
<td>17%</td>
</tr>
<tr>
<td>Break/Lunch</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>14%</td>
</tr>
</tbody>
</table>
Q16: Since the onset of COVID, why did you visit?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Routine</td>
<td>25%</td>
<td>-15</td>
</tr>
<tr>
<td>Tourism</td>
<td>5%</td>
<td>-9</td>
</tr>
<tr>
<td>Shopping</td>
<td>26%</td>
<td>-40</td>
</tr>
<tr>
<td>Dining</td>
<td>16%</td>
<td>-41</td>
</tr>
<tr>
<td>Events</td>
<td>3%</td>
<td>-47</td>
</tr>
<tr>
<td>Attractions/Art</td>
<td>6%</td>
<td>-25</td>
</tr>
<tr>
<td>Recreation</td>
<td>10%</td>
<td>-7</td>
</tr>
<tr>
<td>Break/Lunch</td>
<td>5%</td>
<td>-17</td>
</tr>
<tr>
<td>Other</td>
<td>40%*</td>
<td>+26</td>
</tr>
</tbody>
</table>

*Top “Other” responses include - “no longer visit”, “Dr. Appt”, “just to see”
Q9: Before COVID, who did you generally visit Union Square with?

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>60%</td>
</tr>
<tr>
<td>Friends</td>
<td>40%</td>
</tr>
<tr>
<td>Family</td>
<td>29%</td>
</tr>
<tr>
<td>Romantic Partner</td>
<td>25%</td>
</tr>
<tr>
<td>Walk Dog</td>
<td>4%</td>
</tr>
<tr>
<td>Other*</td>
<td>7%</td>
</tr>
</tbody>
</table>

*Top “Other” responses include “co-workers”
Q17:
Since the onset of COVID, who did you generally visit Union Square with?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>57% (-3)</td>
<td>Walk Dog</td>
</tr>
<tr>
<td>Friends</td>
<td>10% (-30)</td>
<td>2% (-2)</td>
</tr>
<tr>
<td>Family</td>
<td>10% (-19)</td>
<td>Other*</td>
</tr>
<tr>
<td>Romantic Partner</td>
<td>11% (-14)</td>
<td>5% (-2)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No Longer Visit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>20%</td>
</tr>
</tbody>
</table>

*Most “Other” responses include “I no longer visit”
Before COVID, when I visited Union Square I felt... 

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Awe</td>
<td>Excited</td>
</tr>
<tr>
<td>12%</td>
<td>38%</td>
</tr>
<tr>
<td>Adventure</td>
<td>Confident</td>
</tr>
<tr>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Relaxed</td>
<td>Scared</td>
</tr>
<tr>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>Rushed</td>
<td>Proud</td>
</tr>
<tr>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Romantic</td>
<td>Nostalgic</td>
</tr>
<tr>
<td>8%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Since the onset of COVID, when I visit Union Square I feel...

<table>
<thead>
<tr>
<th>Emotion</th>
<th>%</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awe</td>
<td>6%</td>
<td>-6</td>
</tr>
<tr>
<td>Adventure</td>
<td>7%</td>
<td>-25</td>
</tr>
<tr>
<td>Relaxed</td>
<td>10%</td>
<td>-15</td>
</tr>
<tr>
<td>Rushed</td>
<td>23%</td>
<td>+1</td>
</tr>
<tr>
<td>Romantic</td>
<td>1%</td>
<td>-7</td>
</tr>
<tr>
<td>Excited</td>
<td>5%</td>
<td>-33</td>
</tr>
<tr>
<td>Confident</td>
<td>3%</td>
<td>-18</td>
</tr>
<tr>
<td>Scared</td>
<td>40%</td>
<td>+30</td>
</tr>
<tr>
<td>Proud</td>
<td>2%</td>
<td>-16</td>
</tr>
<tr>
<td>Nostalgic</td>
<td>31%</td>
<td>-1</td>
</tr>
</tbody>
</table>
Before COVID, how likely would you be to recommend that others visit Union Square (1-10)?

8/10

Overall
Q13: Why?

Common Responses:

- Fun
- Shopping
- Iconic
- Must See*
- Heart of SF
Q20:
Since the onset of COVID, how likely are you to recommend that others visit Union Square (1-10)?

5/10 Overall
Q21: Why?

Common Responses:

- Safety
- Closed Stores
- COVID
- Homelessness
Communications
Q23: Have you seen any branded marketing communications from Union Square recently? If so, where?

- No: 49%
- Newsletter: 29%
- Facebook: 13%
Q24: Do you follow Union Square on Social Media?

Yes 40%
No 60%
Q25:
If yes, what Union Square media do you follow?

Top Responses: Facebook Instagram
Q26: If yes, why do you follow Union Square on social media?

Top Response: Shopping & Promotions
Place
Q27:
Which part of Union Square do you engage with most?

Top Responses:
- Restaurants
- The Park
- The Shops
- Westfield
Q28: Why?

Common Responses:

Shopping Stores
Work Nearby
Eating Fun
Q29:
Other than the activities at or around Union Square, are there aspects of the physical space that make visiting an enjoyable experience?

68%
Yes! I enjoy visiting just to be in the space.
Q30: What’s your favorite public space/shopping district in San Francisco?

Top Responses:
Hayes Valley
Fillmore St.
North Beach
Q31: What’s your favorite public space/shopping district (besides Union Square) in CA?

Top Responses:
Stanford S.C.
Demographics
Race

- White/Caucasian: 45%
- Black/African American: 2%
- Hispanic/Latino: 10%
- Asian/Asian American: 28%
- American Indian / Alaskan Native: 2%
- Native Hawaiian or Other Pacific Islander: 2%
- Multi-Racial: 4%
- Prefer not to identify: 8%
- Other (please specify):
Q35: Gender

- Female: 63%
- Male: 34%
- Prefer not to say: 3%
- Prefer to self identify as: 1%
Communications Audit
Communications Audit

A review of basic facts, mission and vision statements, understanding of placemaking and visual identity of collateral and social posts.
Union Square: Basic Facts

History/Size
The Union Square BID is the first and largest of San Francisco’s 14 property-based business improvement districts/community benefit districts, providing supplemental services funded by property owners who are self-assessed. Est. 1997 / 11 Employees

Affiliations
Union Square Foundation

Core Usage
Recreation + Sightseeing (39%)  
Shopping (19%)  
Work (15%)

Impact
USBID makes up less than 1% of the City’s built land area, yet generates over one-third (34%) of citywide sales in general consumer goods.

Instagrammable Sites
Heart Statues, Dewey Monument, Cable Cars, Murals

Tagline/Headlines/ Calls to Action
We are open! Shop. Dine. Drink and Enjoy!
Union Square: Location

A lively 27-block community surrounding Union Square Park in the heart of San Francisco makes up the Union Square BID. It is generally bordered on the north by Bush Street, on the east by Kearny Street, on the south by Market Street and on the west Taylor Street. Directly northeast is Chinatown, with its famous dragon gate at Grant Avenue and Bush Street.
Union Square:
Surrounding Areas
Embarcadero + Ferry Plaza Farmers Market
Embarcadero + Ferry Plaza Farmers Market is a mixture of mainstream stores in the Embarcadero Center and unusual shopping opportunities only a farmers market mixed with some high-end cuisine shops can provide. This is a great place to stop and catch lunch or brunch.

Fillmore Street
Fillmore Street is a cacophony of trendy, high fashion shops mixed with some more quaint one-off shops. Especially notable are some of the eateries and drinking establishments located on Fillmore Street.

Haight Ashbury
Haight Ashbury is world renowned for its history from the sixties. Still maintaining that hippie vibe, it mixes modern cool with urban chic. It is just worth a visit for the colorful fun you will find on the street.

Crocker Galleria
Designer shops span three floors at this galleria featuring a glass dome in the Financial District. Potentially closed for renovation.
Union Square: Surrounding Areas

Hayes Street
Hayes Street has an earthy trendy feel to it and has both some of the most interesting and chic clothing stores as well as some great eateries.

Mission District
Mission District is an exuberant, evolving neighborhood with Latino roots and a hipster vibe. Old-school taquerias and eclectic live-music clubs mix with chef-driven eateries and craft cocktail lounges. There are also tattoo parlors, gourmet ice cream shops and Dolores Park, a popular weekend hangout with skyline views. Vibrant murals line streets such as Clarion Alley.

North Beach
North Beach is full of Italian old world charm. Even though it is more heavily populated with eating and drinking establishments, you will find some of the most interesting and hip shops as well as some old fashioned Italian delis and old world shops and bakeries.

Sacramento Street
Sacramento Street has a very chic vibe to it and there are many shops catering to the more money-set here as well as great restaurants and some unique stores such as one that just sells ribbons. There are also many shops catering to interior design and the home.
SoMa
SoMa, or South of Market, is a vast, warehouse-filled district. It encompasses Mission Bay and South Beach, where the Giants play baseball at waterfront AT&T Park. Surrounding Yerba Buena Gardens is an arts center, sleek convention complex Moscone Center and several museums, including the acclaimed San Francisco Museum of Modern Art. Upscale dining options and high-energy nightclubs.

Metreon
The Metreon is a shopping center located at the corner of 4th Street and Mission Street. It is a four-story 350,000 sq ft building built over the corner of the underground Moscone Center convention center.

Anchorage Square Plaza
Anchorage Square Plaza attached to a hotel has boutiques, gift shops, fast-food venues & sightseeing tour vendors.

Union Street
Union Street is often confused by visitors with Union Square but it is much different. The highlight of Union Street is the Victorian architecture of the shops. You will find a lot of interesting small shops running towards trendy but also including classic styles. Jewelry stores and goldsmiths abound on Union Street. If you are getting engaged or looking for a gorgeous bauble... this is the street to be on. There are more jewelry stores per district on Union Street than any other.
Union Square: Transportation
Union Square: Muni Stops - Montgomery
Union Square: Muni Stops - Powell
Union Square:
Placemaking
Hallidie Plaza has the potential to become one of the most vibrant and exciting public spaces in the city. It is the gateway to the city for over 7 million visitors a year who arrive from the airport via BART. Yet, in its current state, it does not portray San Francisco as a city that values its public spaces.

A group of community stakeholders are working together to develop a vision for Hallidie Plaza to transform it from a neglected, underutilized space to an active, exciting public plaza.

*Placemaking by Union Square Foundation*
The street currently has service access to multiple businesses, limited metered and commercial parking spaces, and three restaurants (two occupied and one vacant) with doors onto the street.

The street has high potential as an active pedestrian way due to its location and the businesses that open onto the street.

Recently, the street has received funding through the City grant process from Groundplay and a Community Challenge Grant specifically for a neon light art project. The Union Square Foundation is seeking additional funding for programming and beautification needs.

*Placemaking by Union Square Foundation*
A former red light district prior to the 1906 San Francisco earthquake, Maiden Lane is now home to a charming array of boutiques and art galleries.

It is closed to vehicular traffic during the day by unique white gates with light posts. Cafes move tables into the street for outdoor dining after service hours. Festival lighting was installed in 2013 and flower baskets were installed in 2018 thanks to a grant.

Long term solutions might include partnering with the City for improvements include replacing all paving, planting and adding sustainability features.

*Placemaking by
Union Square Foundation

LUNCH ON THE LANE-MAIDEN LANE

We activate Maiden Lane during the spring and summer months with food trucks and entertainment. Click to learn more.
Powell Street is one of the busiest pedestrian corridors in the District. It connects the cable car turnaround, Hallidie Plaza, and the BART/Muni Station to Union Square. Artists Gillie and Marc from Australia bring Paparazzi Dogs to San Francisco. These bronze statues can be seen one block away from Union Square along the cable car line.

The Powell Streetscape Project will design and construct a new streetscape layout for Powell Street between Geary and Ellis streets to enhance the quality and use of the public realm, improve safety for all street users, improve cable car safety and performance, and renew transportation infrastructure.

*Placemaking by Union Square Foundation*
Winter Walk SF offers 5 weeks of holiday decor, mobile food and craft beverages curated by Off the Grid, family friendly activities, art, community performances and entertainment, sponsored activations, and 17,000 sqft of open green space.

This holiday pop-up pedestrian plaza was conceptualized as a mitigation effort as part of the holiday construction moratorium as the above ground portion of the Central Subway was being built.

Now that Stockton Street between Geary and Ellis has reopened to cars and buses, Winter Walk SF is looking for a new home as this has become a holiday tradition for 2.2 million SF locals and Bay Area visitors.

*Placemaking by Union Square Foundation

Current:

2.2 million visitors in 2018.
No. 1 most visited holiday attraction
$47 million economic Impact
Union Square:
Must-See
Hearts in San Francisco is an annual public art installation started in 2004 by the San Francisco General Hospital Foundation for the purpose of fundraising. The project is inspired by the international CowParade exhibit. The choice of hearts is inspired by the Tony Bennett song "I Left My Heart in San Francisco."

Each year, uniform heart sculptures are painted by different artists and installed at locations throughout San Francisco, including Union Square. The heart sculptures are auctioned off at the end of each year's installation with the proceeds going to the foundation. Raised over $10mil as of 2013.
Union Square: Dewey Monument

The monument was erected to honor Admiral George Dewey, a hero of the Spanish–American War, for his victory in the Battle of Manila Bay. On May 23, 1901, President William McKinley visited San Francisco to break ground for the monument. Six months later McKinley was assassinated and was succeeded by his vice president, Theodore Roosevelt. On May 14, 1903, Roosevelt officially dedicated the monument, which “commemorates the victory of Admiral George Dewey.”
Union Square: Cable Cars

The San Francisco cable car system is the world's last manually operated cable car system. An icon of San Francisco, the cable car system forms part of the intermodal urban transport network operated by the San Francisco Municipal Railway.

At the end of Powell Street two blocks south, where the cable cars turn around beside Hallidie Plaza at Market Street, is a growing retail corridor that is connected to the SOMA district. Nob Hill, with its grand mansions, apartment buildings and hotels, stands to the northwest of Union Square.
Union Square: Murals
Union Square: Positive Reviews

Review Highlights

“Great respite to take a break from shopping or to get out of the office to grab a quick drink, coffee, or lunch.” in 85 reviews

“There’s tons of stores (Apple, Macy’s, Nike, Saks Fifth Avenue, Tiffany’s etc) restaurants, clubs and hotels.” in 66 reviews

“When you are visiting Union Square, walk up to the Dewey Monument, it’s The Goddess of Victory Statue holding the laurels and trident.” in 7 reviews

“Since the Christmas tree and the ice skating rink was no longer there from winter, there was a ton of open space.” in 36 reviews

“Love the hustle and bustle of Union Square, reminds me of New York and Taiwan, minus a few street vendors.” in 26 reviews

“If the Christmas tree doesn’t put you in the holiday spirit then I think there’s something wrong with you.” in 26 reviews

“There is no where else I feel more festive than when I am spending the day in Union Square for the holidays!” in 42 reviews

“They also have some of the heart sculptures which are fun to take pictures with.” in 10 reviews
Union Square: Negative Reviews

Anthony W., Oakland, CA
5/2/2019
Can you keep the skate boarders out of the area? They're noisy, annoying and dangerous. Plus they're jumping up and down on the steps has to cause damage.

Nick H., Fresno, CA
1/1/2019
I've always looked forward to ice skating with the wifey but this year was a challenge to keep the tradition. The streets are getting dirtier every time we visit and to be honest I would hesitate bringing small children. I literally took a picture of a crack pipe and a person passed out next to it. This was across the street from the ice skating. Come on SF, clean your streets.

Owen P., Washington, DC
7/31/2017
Give this entire area a wide berth unless you love crowds of clueless tourists, dodging human feces, and a thick layer of filth on every surface you touch. Impossible to enjoy the nice view from the park given the overall environment and quality of the facilities.

Timothy D., Austin, TX
12/25/2016
The parking here. Oh my god. There is a 15 minute limit from paying to getting out. On busy days it takes 20+ minutes to get out. What a stupid system that caused so many people to be stuck in the parking lot on Christmas. Don't park here.
Union Square: Visual Identity
Union Square: Visual Identity
Union Square: Visual Identity

Smile is Free
The Art Walk is, too.

Art Walk
Celebrating 100 Muralists by Paint the Void
09:57 AM | 12:46 PM
Join Painting on Geary & Stockton
Meet the Artists, Shop, Drink, Paint and Support

We have partnered with Paint the Void who support local artists by inviting them to paint murals as a response to the void left by the boarded up businesses in the wake of COVID-15. We invite you to come celebrate their 100th mural in action, to meet the artists, and enjoy the Art Walk!

Still want to add more color to your life? Join NYU Institute of Fine Arts-educated art historian, former SFMOMA curator, and current educator Heather Jain on a guided tour.
Union Square:
Messaging
Mission
Improve the experience and economic vitality of the Greater Union Square area by providing cleaning and maintenance, public safety, marketing, advocacy, beautification and capital improvement programs.

Vision
Union Square is the vibrant heart of San Francisco and an international destination where visitors come to enjoy exceptional retail experiences, luxury hotels, world-class cultural institutions, and great public spaces found only in the City by the Bay.
Note: USBID does not post a stance on BLM, but do repost a very small amount of content.
Union Square: COVID Messaging
COVID content is predominantly featured on website, which have touchpoints for customers, employers, and employees.
Hallidie Plaza: Ground Zero or San Francisco's Gateway?

By Karin Rodd, Executive Director | Union Square Business Improvement District | August 10, 2018

Hallidie Plaza is emblematic of our city’s tolerance for inappropriate street behaviors and quality of life issues. No one should have to dodge aggressive panhandlers or sidestep human waste to enter our city. Sadly, this reality has become routine for the millions of visitors and workers traveling to San Francisco, but it doesn’t have to be.

Union Square Business Improvement District Announces New Partnership With Downtown Streets Team

October 7, 2016

In an effort to alleviate homelessness, the Union Square Business Improvement District has collaborated with Downtown Streets Team to provide work opportunities for homeless or near-homeless individuals.

Follow us on LinkedIn for the latest updates.
Union Square: Social Media

@UnionSquareSF
Facebook
74,984 likes
74,757 followers

Instagram
3,939 followers

Twitter
4,670 followers

LinkedIn
194 followers

Youtube
22 Subscribers,
>100 views per video*

Pinterest
10,200 Monthly Views
Union Square: Social Media Content

There are no brand elements present on any social media besides the logo. Most of these images and posts could belong to anyone.
Union Square: Social Media Event Promo
Union Square: Social Media Shopping Promo
Union Square: Michael H. Ruska Photos

Michael H Ruska takes photos of people around Union Square and tags USBID.
Union Square: Video

Every City Revolves Around a Square

Union Square BID Services Video

Union Square Business Improvement District Clean & Safe Services

Virgin America's Red Hot Union Square SF