

Memorandum

TO: Yulia Carter, Assistant City Manager/Administrative Services Director

FROM: Brian Moura, Economic Development Advisor (Contract)

DATE: September 18, 2019

RE: Analysis of Marinship Business Uses from Sales Tax Data

At last night's General Plan Advisory Committee (GPAC) meeting, the committee reviewed the results from last weekend's Marinship Workshop. This included a report from the M-Group on major themes from the workshop and potential recommendations to the City Council that could become part of the General Plan Update.

Discussion of Business Uses in the Marinship

During the meeting, there was discussion about whether there would be value in looking at the Marinship as three separate areas (as was done in the earlier Marinship Specific Plan) rather than as one 200-acre study zone.

There was also discussion about the business uses in the Marinship area and the need to consider the existing uses as the General Plan process moves forward. A final point was the goal of looking at economic sustainability with businesses in the Marinship that have high municipal revenue generation potential and low environmental impact.

Marinship Geo Zones in the Economic Development Program

Part of the Economic Development program's short-term initiatives is work on establishing Geo Zones for the City's Business Activity and then matching these zones to revenue and business licensing data. An initial set of these reports have been provided to the City Council. The next step in the process is to generate a list of businesses by Geo Zones to validate the Geo Zone boundaries and to better understand the makeup of the City's business economy.

As part of that project, Geo Zones 4 (North Marinship) and 5 (South Marinship) were created. These zones were based on the existing zoning designations adopted by the City. Zone 4 includes parcels in the I, CS, PI zoning designations while Zone 5 includes parcels in the W, H, PI zoning designations (see attached maps of zones 4 and 5).

Analysis of Marinship Business Uses from Sales Tax Data

To explore some of these questions, I did a quick analysis of the businesses in Geo Zones 4 and 5 that generate over 90% of the City's Sales Tax revenue as reported by the State and provided to the City by Avenu (the City's Sales Tax revenue audit firm).

Results from Geo Zone 5 - Marinship South (W, H, PI)

Key Businesses: 10

Marine Businesses: 9

Annual Revenue: \$173,000+

In Geo Zone 5, the predominant business land use zone is the W or Waterfront zone. In that area, there are 10 businesses that make up 99% of the annual Sales Tax revenue to the City (over \$173,000 annually).

All but one of these businesses involve waterfront and marine uses and property. The remaining business is a restaurant.

<u>Business</u>	<u>St No</u>	<u>Street</u>	<u>Business Type</u>	<u>Use Type</u>
Starbuck Canvas Works	67	Liberty Ship Way	Custom Marine Canvas	Marine Arts
Canvas Works	41	Liberty Ship Way	Custom Marine Canvas	Marine Arts
List Marine Enterprises	69	Liberty Ship Way	Boat/Engine Sales & Service	Marine Commercial Services
Club Nautique	400	Harbor Drive	Sail & Boating School	Marine Commercial Services
South Beach Riggers	399	Harbor Drive	Sail & Boating Repair	Marine Commercial Services
Silver Seas Yachts	300	Harbor Drive	Yacht Sales	Marine Commercial Services
Hirschfeld Yacht	400	Harbor Drive	Yacht Sales	Marine Commercial Services
KKMI Sausalito	500	Harbor Drive	Maritime Sales and Service	Marine Industrial
Clipper Yacht	310	Harbor Drive	Harbor Office	Property Management Office
Fish	350	Harbor Drive	Seafood Restaurant	Restaurant

Results from Geo Zone 4 - Marinship North (I, CS, PI)

Key Businesses: 43

Marine Businesses: 3

Annual Revenue: \$384,000+

In Geo Zone 4, the distribution of business and use types differs quite a bit from the Marinship South area. In this area, there are 43 businesses that make up 91% of the annual Sales Tax revenue to the City (over \$384,000 per year). Of the firms in this zone, only 3 of the 43 are marine uses. The distribution of business types in this area is as follows:

- Applied Art 14
- Beauty Supplies 1
- Business Commercial Services 3
- Business Office 4
- Equipment Leasing 1
- Full Service Supermarket 1
- General Industrial 8
- Industrial Art 1
- Marine Commercial Services 1
- Marine Industrial 2
- Medical Office 1
- Restaurant 5
- Sporting Goods 1

Results from Geo Zone 4 - Marinship North (I, CS, PI)

Business	St No	Street	Business Type	Use Type
Boyd Lighting Fixture Co.	30	Liberty Ship Way	Architecture & Design Materials	Applied Art
AML Limited	85	Liberty Ship Way	Architecture & Design Materials	Applied Art
Taylor Yang Architecture	85	Liberty Ship Way	Architecture & Interior Design	Applied Art
Onyx Worldwide	3020	Bridgeway	Branding & Marketing	Applied Art
Butler, Shine, Stern	20	Liberty Ship Way	Design - Advertising Agency	Applied Art
Serena and Lilly	10	Liberty Ship Way	Design - Children's Linens	Applied Art
Leisa Snyder Design	150	Gate 5 Road	Graphic Designer	Applied Art
Molie L Malone	3000	Bridgeway	Interior Design	Applied Art
Angus McCaffrey	4000	Bridgeway	Interior Design	Applied Art
Martin Kobus	4000	Bridgeway	Interior Design	Applied Art
Charles De Lisle	60	Gate 5 Road	Interior Design	Applied Art
BK Interior Design	150	Gate 5 Road	Interior Design	Applied Art
Braun + Adams	200	Gate 5 Road	Interior Design	Applied Art
Studio Snaidero	30	Liberty Ship Way	Kitchen Remodeler	Applied Art
The Nature of Hair	27	Gate 5 Road	Beauty Supply Store	Beauty Supplies
Joanne's Print Shop	2000	Bridgeway	Digital Printing and Copying	Business Commercial
Fedex Office & Print	2400	Bridgeway	Office Supplies & Services	Business Commercial
Snaps Reprographics	2200	Bridgeway	Reprographics Services	Business Commercial
Trigen & Tellason	480	Gate 5 Road	Investments - Denim Jeans	Business Office
Omnirax Furniture	2330	Bridgeway	Office Furniture	Business Office
Sausalito Art Festival	2400	Bridgeway	Office: Event Planning	Business Office
USA Wine West	3030	Bridgeway	Wine Wholesaler	Business Office
Sentinel Inc.	3030	Bridgeway	Office Equipment	Equipment Leasing
Mollie Stone's Market	100	Harbor Drive	Full Service Supermarket	Supermarket
Arc Battery Company	90	Gate 5 Road	Auto Parts Store	General Industrial
A&A Automotive	70	Gate 5 Road	Auto Service	General Industrial
Sausalito Imports	90	Gate 5 Road	Auto Service	General Industrial
Heath Ceramics	400	Gate 5 Road	Light Fab & Manufacturing	General Industrial
Q Surgical	28	Liberty Ship Way	Medical Equipment Distributor	General Industrial
Dvorson's Food Service	480	Gate 5 Road	Restaurant Equipment	General Industrial
Key Information Systems	3030	Bridgeway	Technology Systems Integrator	General Industrial
Westen Textile	1750	Bridgeway	Textile Bag Manu & Sales	General Industrial
Hood Sailmakers	466	Coloma	Sail Fabrication for Sailboats	Industrial Art
Harbor Dive Center	200	Harbor Drive	Water Sports Equipment	Marine Commercial
Universal Sonar Mount	245	Gate 5 Road	Marine Equipment	Marine Industrial
Bayside Boatworks	2360	Marinship Way	Marine Repair Services	Marine Industrial
South Marin Dermatology	2330	Marinship Way	Dermatology	Medical Office
Feng Nian Restaurant	2650	Bridgeway	Restaurant	Restaurant
Avatar's	2656	Bridgeway	Restaurant	Restaurant
Anchorage 5	475	Gate 5 Road	Restaurant	Restaurant
Sausalito Seahouse	305	Harbor Drive	Restaurant	Restaurant
Le Garage	85	Liberty Ship Way	Restaurant	Restaurant
Cleary Bikes	4000	Bridgeway	Bike Manufacture & Sales	Sporting Goods

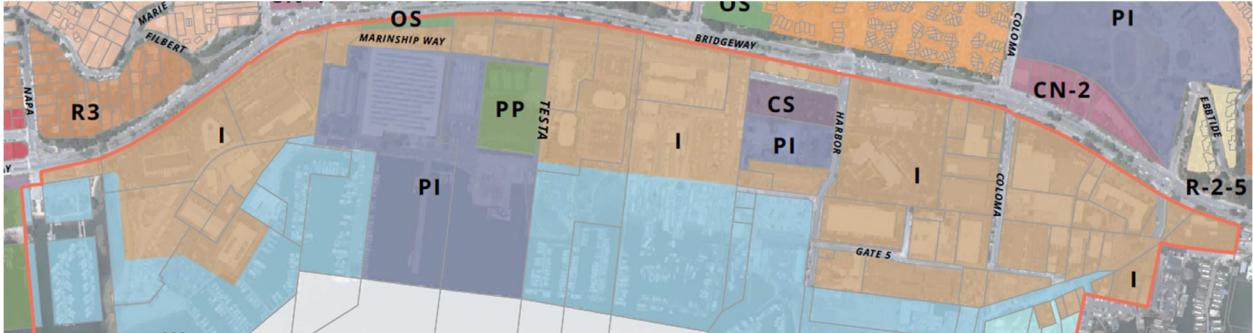
Next Steps

Work is continuing with the City's revenue audit firms (Avenu and HdL) to review the 8 Business Geo Zones so that the zones can be refined and finalized. This will enable the City to generate revenue reports and lists of businesses by zone in the future.

As part of that process, there will need to be discussion on whether the Marinship area business zones should be changed from the current zones 4 and 5 to three zones as discussed at last night's GPAC meeting.

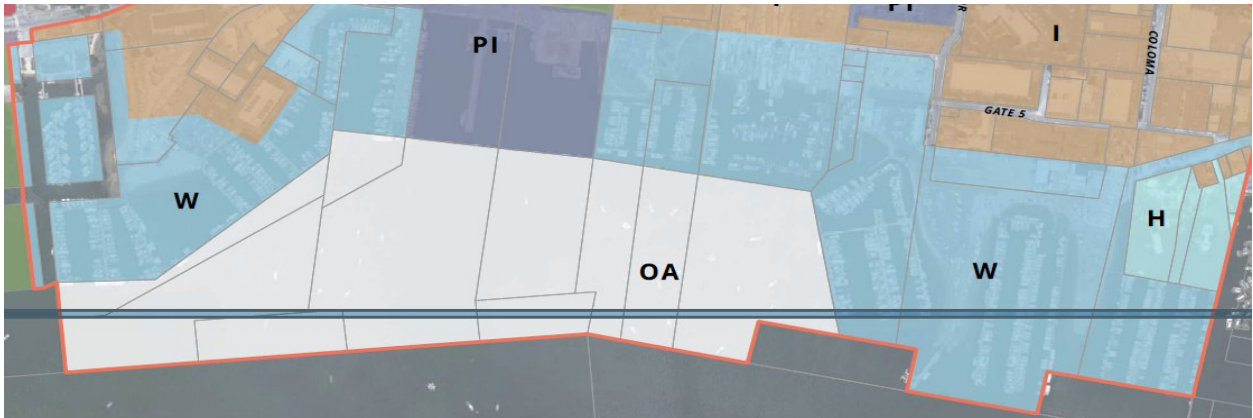
Geo Zone Maps

Geo Zone 4 Marinship North (I, CS, PI)



Shown above from Zoning Map in Orange (I), Purple (CS), Blue (PI)

Geo Zone 5 Marinship South (W, H, PI)



Shown above from Zoning Map in Light Blue (W), Blue (PI), Aqua (H)
