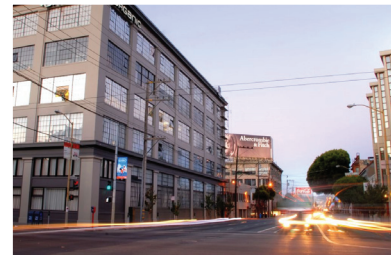
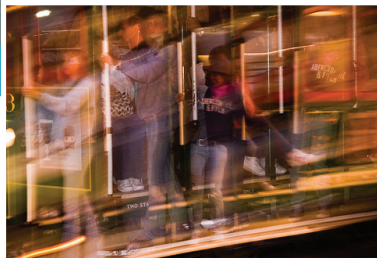


2008

SAN FRANCISCO COMMERCE & INDUSTRY INVENTORY



San Francisco Planning Department
October 2008



SAN FRANCISCO
COMMERCE & INDUSTRY
INVENTORY

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San Francisco Planning Department
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FINDINGS

FROM THE 2008 COMMERCE & INDUSTRY INVENTORY

ECONOMY ON THE MEND

Employment Continues Recovery

In 2007, there were over 556,000 jobs in San Francisco, an increase of about 20,300 jobs or 3.8% growth from the previous year. San Francisco employment continues to grow and is at its highest level since 2001. Overall employment, however, is still down about 8.5% from the high of 608,270 jobs in 2000 (see Figure 1). Industrial jobs grew for the first time in ten years. Office, Retail, and Cultural/ Institutional/ Educational (CIE) sectors also gained jobs in 2007, while the Hotel sector posted a slight loss (see Table 3.1).

Office Employment Up

For a third year in a row, the number of office workers grew, showing an increase of 4.1% in 2007. Office is the largest employment sector, representing 38.6% of the workforce. The addition of some 8,390 new jobs in 2007 brings this sector's total jobs to 214,660 (see Figure 2). However, this is still almost 12% below the 2000 high of 243,290. Within the office sector, Office Services gained more than 6,640 workers, while Agriculture jobs decreased slightly. The distribution of other office sub-sector jobs largely remained the same (see Table 3.2.1). As the number of office workers increased, the number of office establishments decreased by almost one percent from 2006

FIGURE 1 EMPLOYMENT IN SAN FRANCISCO FROM 1998-2007

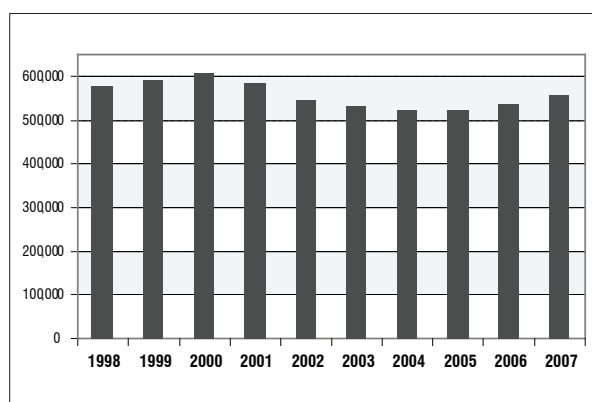
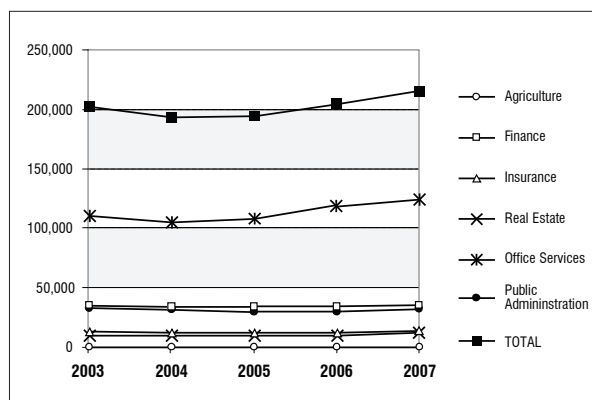


FIGURE 2 OFFICE EMPLOYMENT FROM 2003-2007



Industrial Jobs Increase For The First Time In A Decade

The number of industrial workers increased for the first time in many years. The gain of almost 3,290 industrial jobs in 2007 represents a 4% increase from 2006 (see Figure 3). This sector, with some 84,990 workers, makes up 15.3% of the total workforce. The Industrial sector, in decline in the last decade, has exhibited a 9% drop in employment from 2003. Still, in 2007, a few sub-sectors of industrial employment showed gains: Information jobs grew by almost 35%, Other Manufacturing jobs grew almost 23%, and Construction jobs increased 11.6%. Despite this overall increase, the number of industrial establishments decreased 0.2% to just under 4,840 (see Tables 3.2.3 and 4.2.3).

Cultural, Institutional, and Educational Jobs and Establishments Continue To Grow

Cultural, Institutional and Educational (CIE) is San Francisco's second biggest employment sector with about 135,360 workers. For the fifth straight year, there has been steady growth in CIE jobs, including a 3.6% increase since 2006 and an 8.4% increase since 2003 (see Figure 4). In 2007, every sub-sector of CIE employment grew. With over 20,460 establishments, CIE is the largest sector in the economy – largely driven by the number of small day care establishments and home-based businesses (see Tables 3.2.4 and 4.2.4).

Retail Sector Still Recovering

Retail jobs increased 4.0% in 2007 to just over 102,250 or close to recovering the recent historic high of 103,508 in 2000. The overall increase masked some churning within the industry including a substantial increase in General Merchandise jobs. Only the Other Retail Stores sub-sector posted job losses (see Figure 5).

The retail sector also grew for the fifth consecutive year and retail sales totaled \$9.44 billion in 2007. Adjusting for inflation, however, this is a decrease of 4.6% from 2006 but an increase of 10.5% since 2003. Moreover, retail sales in 2007 are almost 10% lower than their historic peak in 2000 (see Table 5.2.1).

FIGURE 3 INDUSTRIAL EMPLOYMENT FROM 2003-2007

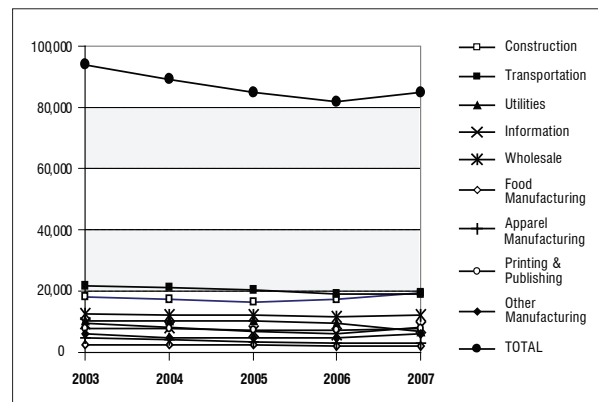


FIGURE 4 CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT FROM 2003-2007

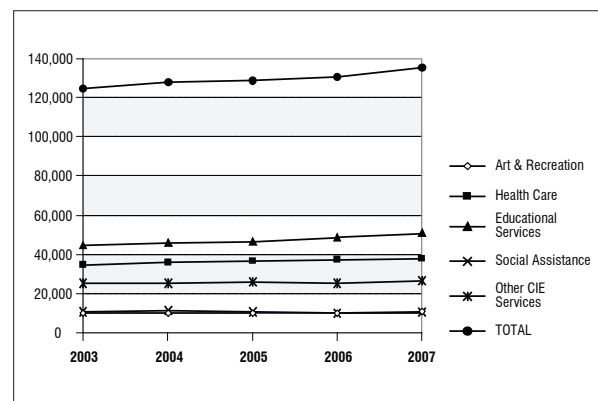
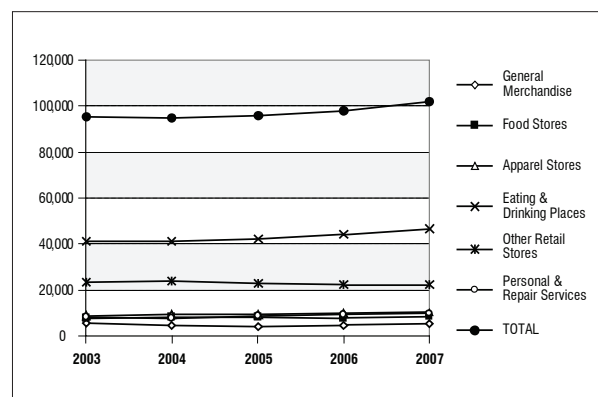


FIGURE 5 RETAIL EMPLOYMENT FROM 2003-2007



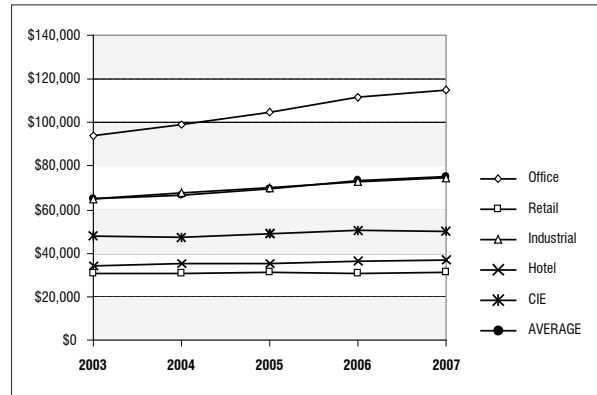
The number of retail establishments decreased by 1.6% in 2007 to a total of some 7,390 retail establishments (see Tables 3.2.2 and 4.2.2).

Average Wages Reach an All-Time High

Real wages have risen in San Francisco for the fourth consecutive year (see Figure 6). The \$75,099 per worker average represents a 2.6% increase from 2005, and is the highest level on record. This average wage increase occurred in all sectors except CIE, which saw a slight drop.

Office workers continue to be the most highly compensated, at an average of \$115,120 per year. The gap is also widening, reflected by a 3.3% average wage jump from 2006 for this sector. Smaller increases were registered in the Industrial (2.6%), Hotel (1.8%), and Retail (1.6%) sectors (see Table 5.1.2).

FIGURE 6 REAL WAGES FROM 2003-2007

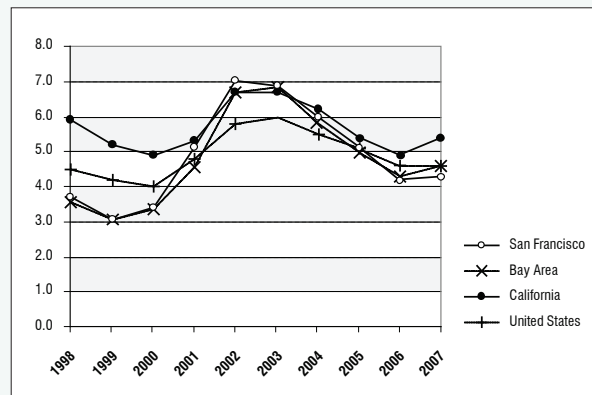


Bay Area Employment On The Rise; Unemployment Up Slightly

Bay Area employment continued to increase in 2007, recovering from four years of decline that marked the dot-com bust of the early 2000s. The addition of some 53,000 new jobs brought the Bay Area total to 3.47 million employed residents in 2007. This represents an increase of almost 1.6%. However, this is still 4% lower than the high of 3.61 million workers in 2000. The number of employed San Francisco residents increased from 405,000 to 415,000 or 2.4% (see Table 2.1.3).

While regional employment increased slightly, regional unemployment increased for the first time in four years (see Figure 7). In 2007, 4.6% of Bay Area workers were unemployed, up from 4.3% in 2006, but still down from a recent high of 6.8% in 2003. Still, unemployment rates were much higher than the recent low of 3.0% in 1999, at the height of the dot.com boom. Trends are similar in San Francisco, where 4.3% of residents were unemployed in 2007. This is up from 4.2% in 2006 and a recent high of 7.0% in 2002. It still represents a much higher rate of unemployment than the recent low of 3.1% of 1999 (see Tables 2.1.2 and 2.1.4).

FIGURE 7 BAY AREA UNEMPLOYMENT FROM 1998-2007



1.0 INTRODUCTION

1.1 CONTEXT

This is the fourteenth *Commerce and Industry Inventory* prepared by the San Francisco Planning Department. It contains data for calendar year 2007. The immediate goal of this annual Inventory is to make local land use-related economic data available to community groups, businesses, and private and public agencies. The long-term goal is to establish a consistent time series of economic activity data and compile background information for updating the Commerce and Industry Element of the San Francisco General Plan. The analysis of economic trends and policy recommendations regarding economic activity in San Francisco are also contained in various documents published periodically by the San Francisco Planning Department.

This Inventory provides information on economic activities in San Francisco. It includes population, labor force, employment, establishments, wages, retail sales, government expenditures and revenues, and building activity data in San Francisco from 1998 through 2007. In addition, the data for previous years are revised when more accurate information was available during the preparation of this current publication.

The Inventory is organized into seven chapters.

- **Chapter 1 – Introduction** contains the context provided above. The remainder of the chapter defines the data formats, economic indicators and the variables contained within each data set, and two industry classification systems used in the Inventory to present the economic data in chapters 2 through 5.
- **Chapter 2 – Regional Overview** presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, employment, and unemployment indicators for the San Francisco Bay Area. This information is presented by four subregions of the Bay Area: North Bay, East Bay, South Bay, and San Francisco. Unemployment data for the Bay Area, California, and the United States are presented as well.
- **Chapter 3 – Employment** presents information on San Francisco's employment from 1998-2007 in three predefined data formats which are: Industry Group, Land Use Category, and Commerce and Industry (C&I) District. These data formats are explained in Chapter 1 – Data Formats.

- **Chapter 4 – Establishments** reports the number of establishments as places where businesses are operated or where service and industrial operations are performed. The chapter presents data on the number and distribution of active business establishments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size-class.
- **Chapter 5 – Monetary Transactions** measures various aspects of the city's economy in monetary terms. This chapter provides data related to wages, taxable retail sales and sales permits, city government revenues and expenditures. Wage data are presented by Land Use Category. Taxable retail sales and permits data are presented by type of business. City government revenues and expenditures are reported by source and function.
- **Chapter 6 – Building and Land Use** provides information regarding construction activity in San Francisco. It presents the number of building permit applications and the total construction cost related to permit applications from 1998 to 2007. The permit applications by permit status are reported only for 2006. This chapter also contains statistics on land use in San Francisco. The data in this chapter are derived from the San Francisco Department of Building Inspection and are summarized by Neighborhood Plan Area rather than Commerce & Industry district format used in chapters 2 through 5.
- **Chapter 7 – Transportation** describes recent trends in San Francisco's transportation and transit systems. This includes analysis of mode split (i.e., what kind of transportation people use to complete their trips), parking availability, vehicle occupancy (i.e., the number of people per private vehicle), transit service, and Transit Impact Development Fee (TIDF) revenues).

1.2 DATA FORMATS

The economic data in the Inventory are presented in terms of time, type of activity, and geographic distribution. The economic indicators are measured by their specific units such as employees, establishments, and dollars. The Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators by using three specific data formats or groupings of the data:

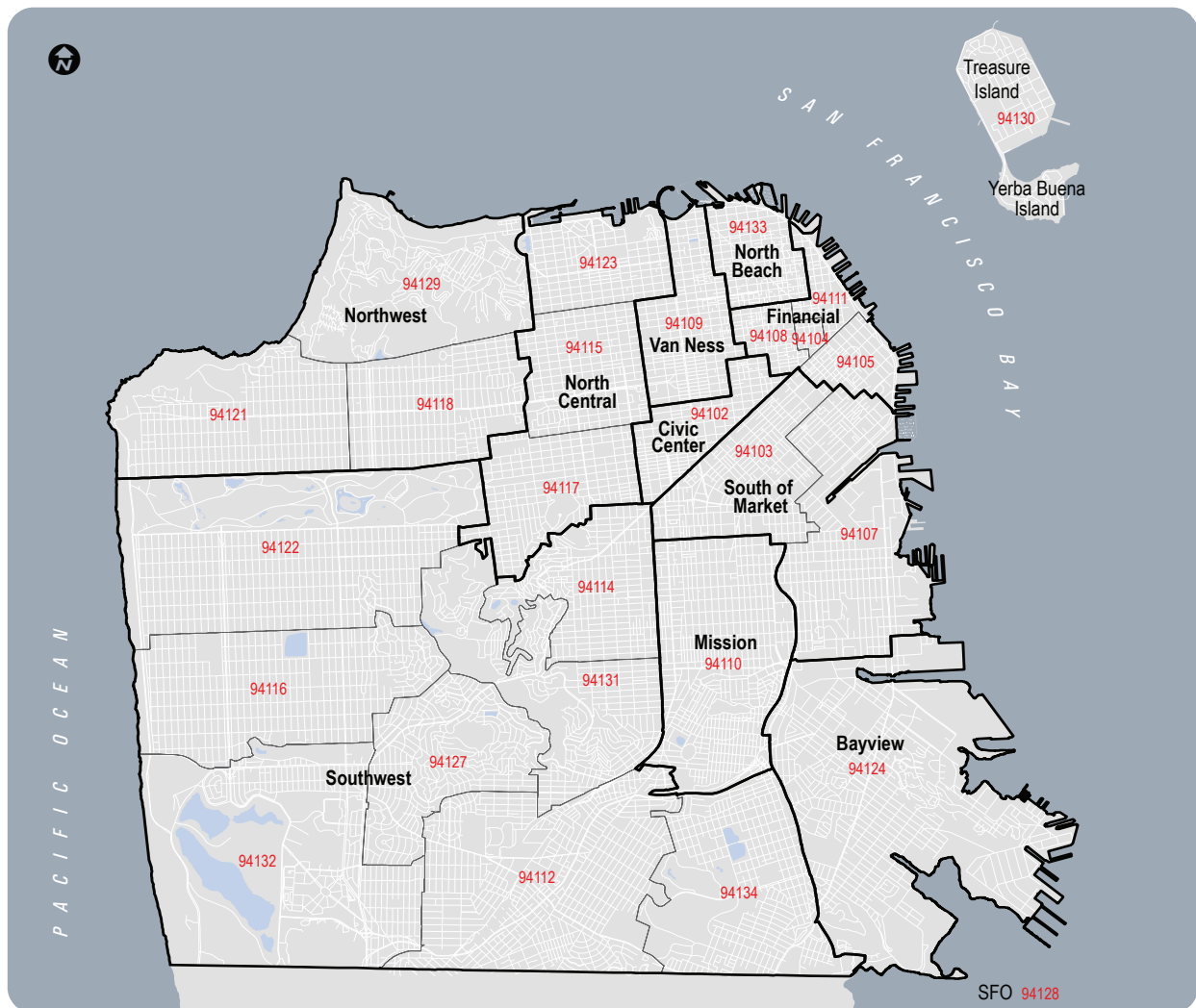
- Commerce and Industry Districts;
- Land Use Category; and
- Industry Group.

These data groups are discussed below. To the extent possible, the data in the Inventory, which are gathered from different sources, are aggregated into these three pre-defined formats. Some of the data remain in their original formats because of limited detail in the original data source.

Commerce & Industry Districts



The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. This classification aggregates small zip code based units into 10 large districts encompassing the entire city of San Francisco. Each district is defined by one or more postal zip codes because a zip code is traditionally the smallest geographical unit for which economic data are available. The district boundaries are as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to the economic data. The C&I district boundaries are shown on Map 1.1.

Commerce and Industry Districts are characterized by a concentration or specialization in one type of Land Use Activity or similar neighborhood commercial activities.



**Commerce and Industry Districts
San Francisco**

0 1 Miles
MAP 1.1

 District Boundaries
 Zip Code Boundaries

- The **Mission** and **North Beach** districts present intense local retail activities and have very defined identities for the local and visitor population.
- The **Bayview** district houses a high concentration of industrial activities and shows a low density in terms of population, employment, and establishments.
- The **Civic Center** is defined by its high concentration of institutional and government activities.
- The **Van Ness** district is delineated around a commercial corridor and some residential activity.

- The **North Central** district concentrates a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and the more peripheral residential area to the west.
- The **South of Market** district contains a combination of office and industrial activities, located between the Financial district and Bayview.
- The **Financial** district covers the densest area with the highest concentration of employment and establishments.
- The **Southwest** and **Northwest** districts are predominantly residential, with a very low business density.

In addition to the above ten zip code-based districts, there is an Unclassified category. This category represents home-based business establishments and organizations, particularly care-givers. These groups do not register a physical address with the State and thus are unable to be classified into a specific geographic district. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

The Inventory also provides information on geographic areas other than Commerce and Industry Districts. These areas are referred to as Plan Areas and are used exclusively in Chapter 6. The neighborhood district boundaries tend to follow more homogeneous economic patterns than the zip code-based Commerce and Industry districts.

Land Use Categories

This classification facilitates the use of economic information for studies related to land use policy development. It is useful in the evaluation of employment, establishments, and transactions within their physical parameters. It matches the type of economic activity with a corresponding type of building structure as well as the prevalent land use pattern. This classification is based only on San Francisco's business activities and land use pattern. Its application to any environment outside of the city may require some adjustments.

The six Land Use categories used in this Inventory are: Office, Retail, Industrial, Hotel, Cultural/Institutional/ Educational (CIE), and Residential. The Residential land use category is addressed only in Chapter 6 in the context of building permits and land use by plan areas. The definitions of each of these categories are as follows:

- **Office** activity includes professional services such as administration, legal services, architecture, engineering, real estate, computer services, research and development activities, and government administrative functions. Three types of spaces are considered: primary offices, which mainly include headquarters and large firms; secondary offices, which include small professional offices and services, and walk-in customer facilities such as banking.
- **Retail** activity includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, auto repair shops, and beauty shops.
- **Industrial** activity includes establishments related to processing and movement of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation, information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and industrial equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel** activity is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.

- **Cultural/Institutional/Educational (CIE)** activities cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories. They are often specialized facilities, many of which are non-profit organizations.

Industry Groups

This classification facilitates collection and tabulation of data related to individual business establishments. It aggregates all business establishments into specific Industry groups according to similarity of their product or process used in production related activities. These Industry groups are based on two pre-established industry classification systems—*Standard Industry Classification* (SIC) system and *North American Industry Classification System* (NAICS). These systems were developed by the United States Department of Commerce and adopted by the California Employment Development Department (EDD) to classify all business establishments and organizations. NAICS is a new system, which was released in 1997 and last revised in 2007. It replaces the SIC system used before 2001. Both systems are discussed below.

- **The SIC system** classifies all business establishments based on the kind of product or service they provide. It is a four-digit coding system. The first two digits of the code represent sectors to represent major categories of economic activities, first three digits represent industry groups, and four digits correspond to specific industries.
- **The NAICS** classifies all business establishments based on the similarity in the process used to produce goods or services. NAICS is a six-digit coding system. Under NAICS, the first two digits of the code are designated as sector to represent general categories of economic activities. The first three digits are designated as sub-sector to represent major category of economic activities. The first four digits represent industry group, while the five and six digit classifications correspond to specific industries.

Some of the data in the Inventory are presented by Industry Group using the North American Industry Classification System (NAICS), which includes these industry sectors: Farm, Natural Resources, Mining and Construction, Manufacturing, Transportation, Utilities, Information, Wholesale Trade, Retail Trade, Financial Activities, Professional and Business Services, Educational and Health Services, Leisure and Hospitality, Other Services, and Government. Other Services includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. Government includes all civilian employees of federal, state, and local government, regardless of the activity in which employees are engaged.

Industrial Classification Systems: NAICS and SIC

NAICS organizes all economic activity into 20 broad sectors as opposed to 10 sectors under the SIC system (Table 1.1). The purpose for this broader categorization is to clearly establish and distinguish each industry sector from another. NAICS also includes 350 new industries including several new high-tech and services related industries which were not appropriately defined and recognized in the SIC system.

For the purposes of this Inventory, SIC and NAICS classifications are aggregated into industry groups and land use categories. Table 1.2 shows major industry groups related to each land use category and their corresponding SIC and NAICS groupings.

Data from 2001 to 2006 in Chapters 3 to 5 of this Inventory were prepared using business and employment data organized by NAICS. Data from 1998-2000 in this Inventory were prepared using business and employment data organized by SIC code. Several adjustments have been made in the data from 1998-2000 so that data in these years are comparable with 2001-2007 data to the extent possible. Even after these adjustments, however, differences in a few industry groups in 1996-2000 are significant from the corresponding data groups in proceeding years. Key industry groups and land use categories with revisions in their data structure are listed in Table 1.3.

TABLE 1.1 MAJOR INDUSTRY CLASSIFICATION CATEGORIES

NAICS (Used since 2001)			SIC (Used through 2000)		
S.N.	Code	Sectors	S.N.	Code	Divisions
1	11	Agriculture, Forestry, Fishing and Hunting	1	00-09	Agriculture, Forestry, and Fishing
2	21	Mining	2	10-14	Mining
3	23	Construction	3	15-17	Construction
4	31-33	Manufacturing	4	20-39	Manufacturing
5	48-49	Transportation and Warehousing	5	40-49	Transportation, Communications, and Utilities
6	22	Utilities			
7	51	Information			
8	42	Wholesale Trade	6	50-51	Wholesale Trade
9	44-45	Retail Trade	7	52-59	Retail Trade
10	52	Finance and Insurance	8	60-67	Finance, Insurance, and Real Estate
11	53	Real Estate and Rental and Leasing			
12	54	Professional, Scientific, and Technical Services	9	70-89	Service Industries (includes business, engineering, hotels, motels, repair services, entertainment, recreation, health, education, social, and other services related industries)
13	55	Management of Companies and Enterprises			
14	56	Administrative and Support, Waste Management and Remediation Services			
15	61	Education Services			
16	62	Health Care and Social Assistance			
17	71	Arts, Entertainment, and Recreation			
18	72	Accommodation and Food Services			
19	81	Other Services (except Public Administration)			
20	92	Public Administration	10	90-98	Public Administration

Note: S.N. = Sector Number

Sources: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

TABLE 1.2 CLASSIFICATION BY LAND USE CATEGORIES AND INDUSTRY GROUPS

Land Use Category	NAICS (Used since 2001)		SIC SYSTEM (Used through 2000)		
	Industry Group	NAICS Code	Industry Group	Industry Subsector	SIC Code
Office <i>Examples:</i> Headquarter offices, professional services, branch banks	Agriculture	111-115 211-213	Agriculture	Agriculture Mining	00-08 10-14
	Finance	522-523	Finance	Finance	60-62
	Insurance	524-525	Insurance	Insurance	63-64
	Real Estate	531, 533	Real Estate	Real estate	65
	Office Services	516	Office Services	Transportation services	47
		518		Holding and investment offices	67
		519		Engineering & management	87
		541		Business services	73
		551		Miscellaneous	89
		561		Administrative & support services	
			Legal Services	Legal services	81
	Public Administration	921-928	Public Administration	Public administration	91,93,95-97
Retail <i>Examples:</i> Stores, restaurants, bars, commercial parking lots	General Merchandise	452	General Merchandise	General merchandise stores	53
	Food Stores	445	Food Stores	Food stores	54
	Apparel Stores	448	Apparel Stores	Apparel and accessory stores	56
	Eating & Drinking Places	722	Restaurants	Eating and drinking places	58
	Other Retail Stores	441, 447	Other Retail Stores	Building materials & garden supplies	52
		442		Auto dealers & service stations	55
		443,446,451		Furniture & home furnishings stores	57
		453-454		Miscellaneous retail	59
		532		Rental & leasing services	
	Personal & Repair	812	Services and Repair	Personal services	72
				Repair, services, & parking	75-76
Industrial <i>Examples:</i> Warehouses, factories, workshops showrooms, port television, telegraph, cable, satellite	Construction	236-238	Construction	Construction	15-17
	Transportation and Warehousing	488	Transportation and Warehousing	Railroads, line-haul operating	40
		485, 487		Local & interurban transit	41
		484, 492-493		Freight transportation & warehousing	42
		491		U.S. Postal Service	43
		481, 483		Water and air transportation	44-45
		486		Pipeline transportation	46
	Utilities	221	Public Utilities	Electric, gas, & sanitary services	49
		562			
	Information	515	Communications	Radiotelephone broadcasting	48
		517		Radiotelephone communication	
	Wholesale	423-425	Wholesale	Wholesale	50-51
	Food Manufacturing	311-312	Food Manufacturing	Food manufacturing	20
	Apparel Manufacturing	313-315	Apparel Manufacturing	Apparel & textile manufacturing	22-23
	Printing and Publishing	323, 511	Printing and Publishing	Printing and publishing	27
	Other Manufacturing	321-322, 337	Other Manufacturing	Fishing	09
		324-325		Lumber, furniture & fixtures, paper	24-26
		316, 326-327		Chemicals & petroleum production	28-29
		331-333		Rubber, leather, stone/clay/glass/concrete	30-32
		334-335		Metal, industrial machinery & equipment	33-35
	Repair Services	336, 811		Electrics & electronic manufacturing	36
	Transp Equipment, Building Supplies	339, 444		Transportation equipment	37
	Film & Sound Recording	512		Instruments, miscellaneous	38-39
Hotel	Accommodation	721	Hotel	Hotel, motel, campgrounds	70
Cultural/ Institutional/ Educational <i>Examples:</i> Theaters, museums, nightclubs, hospitals libraries, schools churches	Art and Recreation	711	Film & Recreation	Motion picture production & recording	78
	Performing arts, amusement parks	713		Art, amusement and recreation	79
	Education Services	611	Educational Services	Educational services	82
	Health Care	621-623	Health Services	Health services	80
	Social Assistance	624	Social Services	Social services	83
	Other CIE Services	712	Other CIE Services	Museums, botanical & zoological gardens	84
		813		Membership organizations	86
		814		Private households	88
Other	*	*	Public Administration	Public administration	92, 94
	Unclassified Establishments	999	Non-Classifiable Establishments	Generally those, which are deemed confidential	99

Sources: Executive Office of The President: Office of the Management and Budget; San Francisco Planning Department

TABLE 1.3 CHANGES IN LAND USE CATEGORIES AND INDUSTRY GROUPS IN 2001

2001		SIC & NAICS Categories	NAICS Code	SIC Code	1997-2000	
Land Use Category	Industry Group				Land Use Category	Industry Group
Office	Office Services	Veterinary Services For Livestock	54194	741	Office	Agriculture
Office	Office Services	Veterinary Services for Animal Specialties	54194	742	Office	Agriculture
Office	Office Services	Horticulture Consulting	54169	781	Office	Agriculture
Office	Office Services	Landscape Architectural Services	54132	781	Office	Agriculture
Office	Office Services	Lawn and Garden Services	56173	782	Office	Agriculture
Office	Office Services	Ornamental Shrub and Tree Services	56173	783	Office	Agriculture
Office	Office Services	Carpet and Upholstery Cleaning	56174	7217	Retail	Personal & Repair
Office	Office Services	Tax Return Preparation Services	541213	7291	Retail	Personal & Repair
Office	Office Services	Babysitting Bureaus	56131	7299	Retail	Personal & Repair
Office	Office Services	Internet Publishing and Broadcasting	516110	2711	Industrial	Printing & Publishing
Office	Office Services	Advertising Specialties Goods Distributors	54189	5199	Industrial	Wholesale
Office	Office Services	Libraries and Archives	519120	8231	CIE	Educational Services
Office	Office Services	Film Archives	519120	7829	CIE	Art & Recreation
Office	Office Services	Travel Motor Clubs	561599	8699	CIE	Other CIE Services
Office	Public Administration	Parole Offices and Probation Offices	92215	8322	CIE	Social Assistance
Office	Public Administration	American Indian and Alaska Native Tribal Governments	92115	8641	CIE	Other CIE Services
Retail	Personal & Repair	Pet Care Services	81291	752	Office	Agriculture
Retail	Other Retail Stores	Air, Rail, & Water Transportation Equipment Rental	532411	4499	Industrial	Transportation
Retail	Other Retail Stores	Motor Vehicle Supplies, Used and New Parts, Tires and Tubes	44131	5013	Industrial	Wholesale
Retail	Other Retail Stores	Furniture	44211	5021	Industrial	Wholesale
Retail	Other Retail Stores	Floor Covering Stores	44221	5023	Industrial	Wholesale
Retail	Other Retail Stores	Brick, Stone and Related Construction Materials	44419	5032	Industrial	Wholesale
Retail	Other Retail Stores	Office Equipment	45321	5044	Industrial	Wholesale
Retail	Other Retail Stores	Computers & Computer Peripheral Equip. & Software	44312	5045	Industrial	Wholesale
Retail	Other Retail Stores	Medical, Dental, and Hospital Equipment and Supplies	446199	5047	Industrial	Wholesale
Retail	Other Retail Stores	Professional Equipment and Supplies	45321	5049	Industrial	Wholesale
Retail	Other Retail Stores	Electrical Apparatus, Equip. Wiring Supplies, Construction Materials	44419	5063	Industrial	Wholesale
Retail	Other Retail Stores	Hardware, Plumbing & Heating Equipment and Supplies	44413	5072	Industrial	Wholesale
Retail	Other Retail Stores	Farm and Garden Machinery and Equipment	44421	5083	Industrial	Wholesale
Retail	Other Retail Stores	Beauty and Barber Shop Equipment and Supplies	44612	5087	Industrial	Wholesale
Retail	Other Retail Stores	Stationery and Office Supplies	45321	5112	Industrial	Wholesale
Retail	Other Retail Stores	Heating Oil, Liquefied Petroleum Gas	45431	5171	Industrial	Wholesale
Retail	Other Retail Stores	Lawn, Garden, Flowers, Nursery Stock, & Florists' Supplies	44422	5191	Industrial	Wholesale
Retail	Other Retail Stores	Wardrobe Rental (Motion Pictures)	53222	7819	CIE	Art & Recreation
Retail	Other Retail Stores	Video Tape and Disc Rental	53223	7841	CIE	Art & Recreation
Retail	Other Retail Stores	Recreational Goods Rental	532292	7999	CIE	Art & Recreation
Industrial	Food Manufacturing	Custom Grain Grinding	311119	723	Office	Agriculture
Industrial	Food Manufacturing	Custom Slaughtering	311611	751	Office	Agriculture
Industrial	Food manufacturing	Meat Processed from Carcasses	311612	5147	Industrial	Wholesale
Industrial	Food manufacturing	Bottling Mineral or Spring Water	312112	5149	Industrial	Wholesale
Industrial	Apparel Manufacturing	Custom Tailors and Seamstresses	315	5699	Retail	Apparel Stores
Industrial	Apparel manufacturing	Converters, Broadwoven Piece Goods Fabric	31331	5131	Industrial	Wholesale
Industrial	Printing & Publishing	Printing and Embossing on Fabric Articles	323113	2396	Industrial	Apparel Manufacturing
Industrial	Other Manufacturing	Mops, Floor and Dust Manufacturing	339994	2392	Industrial	Apparel Manufacturing
Industrial	Other Manufacturing	Textile Automotive Trimmings, Seat Belts, Seat & Tire Covers	33636	2396	Industrial	Apparel Manufacturing
Industrial	Other Manufacturing	Motion Picture and Video Tape Production Industries	51211	7812	CIE	Art & Recreation
Industrial	Other Manufacturing	Commercial Distribution Film Libraries	51212	7829	CIE	Art & Recreation
Industrial	Other Manufacturing	Motion Picture Theaters	51213	7832	CIE	Art & Recreation
Industrial	Other Manufacturing	Teleproduction and Post-Production Services	512191	7819	CIE	Art & Recreation
Industrial	Other Manufacturing	Booking Agencies	512199	7829	CIE	Art & Recreation
CIE	Health Care	Homes for the Elderly, Other Residential Care	623312	8361	CIE	Social Assistance
CIE	Health Care	Mental Health and Substance Abuse Facilities	62322	8361	CIE	Social Assistance
CIE	Educational Services	Beauty and Cosmetology Schools	611511	7231	Retail	Personal & Repair
CIE	Educational Services	Barber Colleges	611511	7241	Retail	Personal & Repair
CIE	Other CIE Services	Education, Religious, and Charitable Trusts	81399	6531	Office	Office Services
CIE	Other CIE Services	Condominium Associations	813211	6732	Office	Real Estate
CIE	Other CIE Services	Caverns and Miscellaneous Commercial Parks	71219	7999	CIE	Art & Recreation
CIE	Other CIE Services	Voluntary Health Organizations	813212	8399	CIE	Social Assistance
CIE	Other CIE Services	Grantmaking, Giving, & Human Rights organizations	813219	8399	CIE	Social Assistance
CIE	Other CIE Services	Social Advocacy, Environment, Conservation, Wildlife Organizations	81331	8399	CIE	Social Assistance

Note: CIE = Cultural/Institutional/Educational

Sources: Executive Office of The President: Office of the Management and Budget; San Francisco Planning Department

2.0 REGIONAL OVERVIEW

San Francisco has diverse linkages to the region, as well as to the state, national, and global economy. This chapter supplies basic demographic and economic information about the San Francisco Bay Area's nine counties. This information gives an understanding of San Francisco's economic base within a regional and historical context. The period of time covered ranges from 1998 to 2007.

The nine counties in San Francisco Bay Area are: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma. Map 2.1 shows the location of these counties, which have been grouped into four sub-regions: North Bay, East Bay, South Bay, and San Francisco. These sub-regions were initially formed in 1985 on the basis of observed travel patterns of commuters into San Francisco and availability of employment information. Although travel patterns have evolved since the initial observations, these sub-regions have been retained in order to maintain the consistency of the data structure in this chapter. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties.

The regional subdivision allows comparisons between San Francisco, North Bay, East Bay, and South Bay areas that represent the labor force base for San Francisco and the region. When reviewing the tables in this chapter, it is important to note that the Bay Area covers 7,041 square miles in total. The North Bay represents 53 percent of that total, the East Bay 21 percent, the South Bay 25 percent, and San Francisco less than one percent of land area in the region. Population densities in San Francisco are by far the highest in the Bay Area.

This chapter presents two sets of tables and graphs. The first set reports population, labor force, employment, and unemployment by sub-region. These concepts are described below. This data is focused on the residents of each county. For context, unemployment data is also provided for California and the United States as a whole. The second set describes regional employment for each sub-region by industry groups from 1997 to 2006. This data is focused on those that work in each county, independent of where they live.

Each economic indicator is reported in absolute numbers, annual percentage distribution, and percentage change over time. Unemployment figures are presented in terms of average annual rates.



**Bay Area Counties and
Commerce and Industry Sub-Regions**

0 Miles 20
MAP 2.1

- **Population** is defined as the total number of people who live in a specific area, such as a particular county or city. Population data from 1998 to 2007 come from the California State Department of Finance (DoF). These data are based on the 1990 and 2000 Census numbers with yearly updates which take into account city/county surveys of building permits, construction activity, and overall housing stock; tallying of administrative records from local, state, and federal agencies including driver's license data, school registration, and birth and death certificate records; and tracking the status of military bases. The DoF population estimates are generally 3% higher than that of the Census Bureau's estimates.
- **Labor Force** consists of persons who are either working or looking for work, excluding members of the armed forces. Labor force data are based on place of residence. For example, a worker who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed. Labor force data are obtained from the California Employment Development Department (EDD).
- **Employment**, as used in this inventory and defined by EDD, includes persons who were

either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives. These data do not include self-employed, unpaid family workers, domestics, volunteers, or persons involved in trade disputes.

- **Unemployment** is defined as civilians 16 years and older, not at work, who were actively looking for work during the last four weeks, and were available to accept a job or who were waiting to be called back to jobs from which they had been laid off. Civilian unemployment data are based on place of residence. The unemployment data are from EDD, the United States Department of Commerce, and U.S. Census Bureau.

Employment data reported by industry group are based on EDD data. These data are organized by using the North American Industry Classification System (NAICS), as discussed in Chapter 1.

San Francisco's Residents in a Regional Context

- *Table 2.1.1 Bay Area Population by Sub-Region, 1998-2007* — According to the Department of Finance estimates, San Francisco has grown to some 824,500 people in 2007, an addition of 15,700 people from 2006 or just under 2% growth. The rest of the Bay Area continues to grow with the region adding 83,700 new residents. San Francisco led the region in the rate of growth over the last year.
- *Table 2.1.2 Bay Area Labor Force by Sub-Region, 1998-2007* — The number of San Francisco residents in the labor force increased for the second year in a row after five consecutive years of decline: some 11,000 San Franciscans joined the labor force in 2007. Regionally, both San Francisco and the South Bay are growing at the fastest rates, both roughly twice the rate of the North and East Bay sub-regions.
- *Table 2.1.3 Bay Area Employed Residents by Sub-Region, 1998-2007* — Bay Area employed resi-

dents continued to increase with the addition of 54,000 in 2007, about the same as the previous year. After four consecutive years of decline, the number of employed Bay Area residents picked up in 2005; however, the region still lags the 2000 high by almost 10%.

- *Table 2.1.4 Bay Area Unemployed Residents by Sub-Region, 1998-2007* — Unemployment rate in San Francisco rose 0.1% to 4.2%, the first increase since 2002. Increases were greater in the other Bay Area sub-regions. Regionwide, the unemployment rate increased to 4.6% as 13,000 more people were unemployed.

People Who Work in San Francisco in a Regional Context

- *Tables 2.2.1 Bay Area Employment by Industry Group, 1998-2007* — Regionwide, Manufacturing jobs have been declining since 2000. Educational and Health Services jobs, on the other hand, have been growing since 2000. The Professional and Business Services group has been recovering slowing since 2003.
- *Tables 2.2.2 Bay Area Employment by Industry Group and Sub-Region, 1998-2007 – Number of Jobs* — San Francisco's share of the region's employment has remained around 16% for at least ten years.
- *Tables 2.2.3 Bay Area Employment by Industry Group and Sub-Region, 1998-2007 – Annual Percentage Distribution* — Relative to the region, there were no substantial shifts in the percentage distribution of industries.
- *Tables 2.2.4 Bay Area Employment by Industry Group and Sub-Region, 1998-2007 – Annual Percentage Change* — Except for "Farm" employment, there were no substantial shifts in the percentage change of industries. San Francisco's Manufacturing employment remained constant in 2007 after nine years of decline. The roller coaster trend in "Farm" employment, which represents a minuscule portion of San Francisco employment (about 0.03%), can be attributed to industry reporting error.

TABLE 2.1.1 BAY AREA POPULATION BY SUB-REGION, 1998-2007

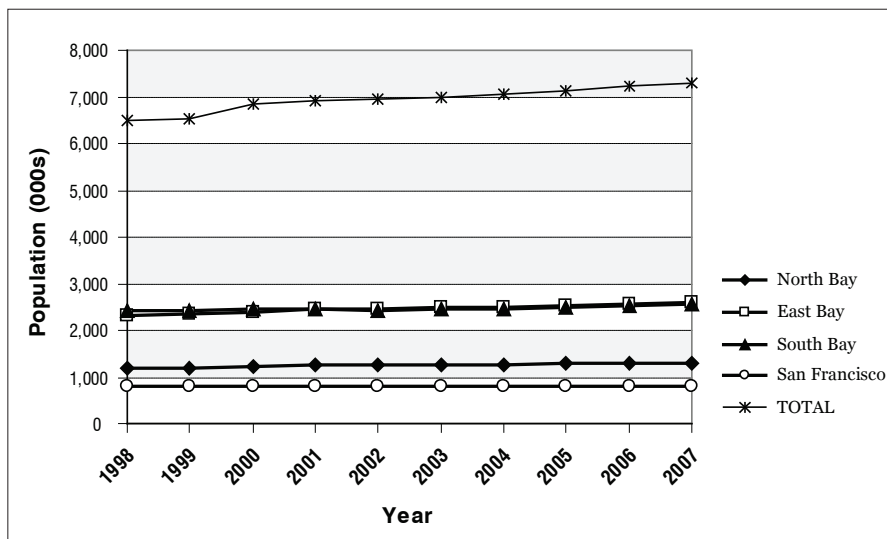
This table presents the number of residents in each Bay Area sub-region for the last ten years, as well as the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Population trends are shown in Figure 2.1.1 below.

Population by Sub-Region (000s)

Sub-Region	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	1,189.9	1,206.3	1,225.8	1,248.8	1,254.7	1,271.0	1,275.6	1,290.6	1,298.5	1,305.3
East Bay	2,309.0	2,349.7	2,384.3	2,451.2	2,468.2	2,501.9	2,505.9	2,539.7	2,568.5	2,594.7
South Bay	2,405.3	2,438.2	2,466.7	2,443.8	2,436.6	2,443.8	2,459.7	2,497.4	2,541.6	2,576.5
San Francisco	789.6	790.5	801.4	793.7	793.6	792.0	795.0	798.7	808.8	824.5
TOTAL	6,499.2	6,540.5	6,853.8	6,918.8	6,932.7	6,968.7	7,036.2	7,126.3	7,217.4	7,301.1

Annual % Distribution	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	18.3	18.4	17.9	18.0	18.1	18.2	18.1	18.1	18.0	17.9
East Bay	35.5	35.9	34.8	35.4	35.6	35.9	35.6	35.6	35.6	35.5
South Bay	37.0	37.3	36.0	35.3	35.1	35.1	35.0	35.0	35.2	35.3
San Francisco	12.1	12.1	11.7	11.5	11.4	11.4	11.3	11.2	11.2	11.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	1.4	1.6	1.9	0.5	1.3	0.4	1.2	0.6	0.5
East Bay	1.8	1.5	2.8	0.7	1.4	0.2	1.3	1.1	1.0
South Bay	1.4	1.2	-0.9	-0.3	0.3	0.7	1.5	1.8	1.4
San Francisco	0.1	1.4	-1.0	-0.0	-0.2	0.4	0.5	1.3	1.9
TOTAL	0.6	4.8	0.9	0.2	0.5	1.0	1.3	1.3	1.2

FIGURE 2.1.1 BAY AREA POPULATION BY SUB-REGION, 1998-2007**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Source:

- US Census, CA Department of Finance, E-1 City / County Population Estimates.
<http://www.dof.ca.gov/HTML/DEMOGRAP/ReportsPapers/Estimates/E1/documents/E-1table.xls>

TABLE 2.1.2 BAY AREA LABOR FORCE BY SUB-REGION, 1998-2007

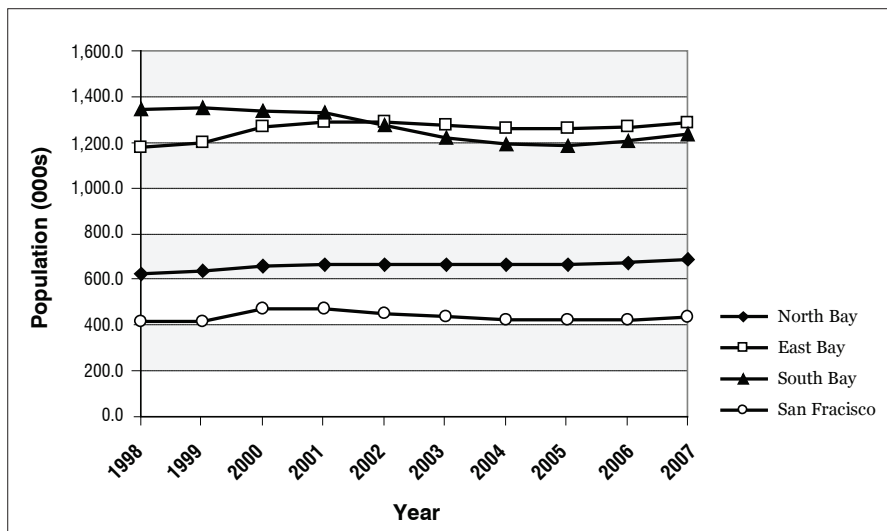
This table presents the number of residents in the labor force in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Labor force trends are shown in Figure 2.1.2 below.

Residents in the Labor Force by Sub-Region (000s)

Sub-Region	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	621.1	634.7	660.2	665.3	667.4	664.7	665.6	668.3	674.9	684.3
East Bay	1,180.8	1,201.3	1,269.6	1,286.7	1,288.0	1,272.7	1,259.2	1,259.7	1,265.2	1,281.5
South Bay	1,344.9	1,354.0	1,337.7	1,332.5	1,271.0	1,221.3	1,193.5	1,187.5	1,204.9	1,234.7
San Francisco	414.7	417.9	472.6	469.4	450.4	433.0	422.3	420.5	422.5	433.3
TOTAL	3,561.5	3,607.9	3,740.1	3,753.9	3,676.8	3,591.7	3,540.6	3,536.0	3,567.5	3,633.8

Annual % Distribution	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	17.4	17.6	17.7	17.7	18.2	18.5	18.8	18.9	18.9	18.8
East Bay	33.2	33.3	33.9	34.3	35.0	35.4	35.6	35.6	35.5	35.3
South Bay	37.8	37.5	35.8	35.5	34.6	34.0	33.7	33.6	33.8	34.0
San Francisco	11.6	11.6	12.6	12.5	12.2	12.1	11.9	11.9	11.8	11.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	2.2	4.0	0.8	0.3	-0.4	0.1	0.4	1.0	1.4
East Bay	1.7	5.7	1.3	0.1	-1.2	-1.1	0.0	0.4	1.3
South Bay	0.7	-1.2	-0.4	-4.6	-3.9	-2.3	-0.5	1.5	2.5
San Francisco	0.8	13.1	-0.7	-4.0	-3.9	-2.5	-0.4	0.5	2.6
TOTAL	1.3	3.7	0.4	-2.1	-2.3	-1.4	-0.1	0.9	1.9

FIGURE 2.1.2 BAY AREA LABOR FORCE BY SUB-REGION, 1998-2007**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Source:

- CA Employment Development Department, annual averages (not seasonally adjusted).
www.labormarketinfo.edd.ca.gov/?PAGEID=131

TABLE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1998-2007

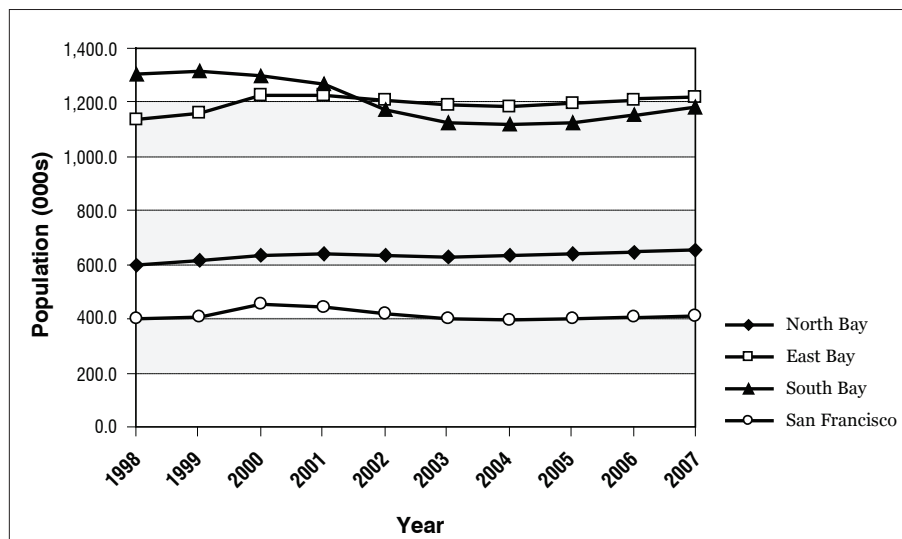
This table presents the number of employed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Employment trends are shown in Figure 2.1.3 below.

Employed Residents by Sub-Region (000s)

Sub-Region	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	597.3	614.4	636.4	639.4	632.6	627.7	631.4	637.6	646.7	653.2
East Bay	1,134.3	1,161.5	1,224.0	1,228.8	1,206.2	1,188.4	1,186.4	1,196.2	1,209.7	1,220.6
South Bay	1,304.4	1,316.9	1,296.9	1,269.2	1,173.5	1,127.1	1,120.5	1,126.8	1,153.7	1,179.7
San Francisco	399.4	405.1	456.5	445.4	418.7	403.2	397.1	399.0	404.7	414.6
TOTAL	3,435.4	3,497.9	3,613.8	3,582.8	3,431.0	3,346.4	3,335.4	3,359.6	3,414.8	3,468.1

Annual % Distribution	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	17.4	17.6	17.6	17.8	18.4	18.8	18.9	19.0	18.9	18.8
East Bay	33.0	33.2	33.9	34.3	35.2	35.5	35.6	35.6	35.4	35.2
South Bay	38.0	37.6	35.9	35.4	34.2	33.7	33.6	33.5	33.8	34.0
San Francisco	11.6	11.6	12.6	12.4	12.2	12.0	11.9	11.9	11.9	12.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	2.9	3.6	0.5	-1.1	-0.8	0.6	1.0	1.4	1.0
East Bay	2.4	5.4	0.4	-1.8	-1.5	-0.2	0.8	1.1	0.9
South Bay	1.0	-1.5	-2.1	-7.5	-4.0	-0.6	0.6	2.4	2.3
San Francisco	1.4	12.7	-2.4	-6.0	-3.7	-1.5	0.5	1.4	2.4
TOTAL	1.8	3.3	-0.9	-4.2	-2.5	-0.3	0.7	1.6	1.6

FIGURE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1998-2007**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Source:

- CA Employment Development Department, annual averages (not seasonally adjusted). www.labormarketinfo.edd.ca.gov/?PAGEID=131

TABLE 2.1.4 BAY AREA UNEMPLOYMENT BY SUB-REGION, 1998-2007

This table presents the number of unemployed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Finally, this table also includes unemployment rates over the last ten years for each sub-region, as well as for California and the United States to provide context. Unemployment rate trends are shown in Figure 2.1.4 below.

Unemployment by Sub-Region (000s)

Sub-Region	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	23.8	20.1	23.8	25.9	34.8	37.0	34.2	30.7	28.2	31.1
East Bay	46.5	39.7	45.6	57.9	81.8	84.3	72.8	63.5	55.5	60.9
South Bay	40.5	37.0	40.8	63.3	97.5	94.2	73.0	60.7	51.2	55.0
San Francisco	15.3	12.8	16.1	24.0	31.7	29.8	25.2	21.5	17.8	18.7
TOTAL	126.1	109.6	126.3	171.1	245.8	245.3	205.2	176.4	152.7	165.7

Annual % Distribution	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	18.9	18.3	18.8	15.1	14.2	15.1	16.7	17.4	18.5	18.8
East Bay	36.9	36.2	36.1	33.8	33.3	34.4	35.5	36.0	36.3	36.8
South Bay	32.1	33.8	32.3	37.0	39.7	38.4	35.6	34.4	33.5	33.2
San Francisco	12.1	11.7	12.7	14.0	12.9	12.1	12.3	12.2	11.7	11.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	-15.5	18.4	8.8	34.4	6.3	-7.6	-10.2	-8.1	10.3
East Bay	-14.6	14.9	27.0	41.3	3.1	-13.6	-12.8	-12.6	9.7
South Bay	-8.6	10.3	55.1	54.0	-3.4	-22.5	-16.8	-15.7	7.4
San Francisco	-16.3	25.8	49.1	32.1	-6.0	-15.4	-14.7	-17.2	5.1
TOTAL	-13.1	15.2	35.5	43.7	-0.2	-16.3	-14.0	-13.4	8.5

Average Annual Rate	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	3.8	3.2	3.6	3.9	5.2	5.6	5.1	4.6	4.2	4.5
East Bay	3.9	3.3	3.6	4.5	6.4	6.6	5.8	5.0	4.4	4.8
South Bay	3.0	2.7	3.1	4.8	7.7	7.7	6.1	5.1	4.2	4.5
San Francisco	3.7	3.1	3.4	5.1	7.0	6.9	6.0	5.1	4.2	4.3
Average	3.5	3.0	3.4	4.6	6.7	6.8	5.8	5.0	4.3	4.6

Average Annual Rate	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
California	5.9	5.2	4.9	5.3	6.7	6.7	6.2	5.4	4.9	5.4
United States	4.5	4.2	4.0	4.8	5.8	6	5.5	5.1	4.6	4.6

Notes:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Sources:

- CA Employment Development Department, annual averages (not seasonally adjusted). www.labormarketinfo.edd.ca.gov/?PAGEID=131
- US Bureau of Labor Statistics; http://www.bls.gov/cps/prev_yrs.htm

FIGURE 2.1.4 UNEMPLOYMENT RATE BY SUB-REGION, 1998-2007

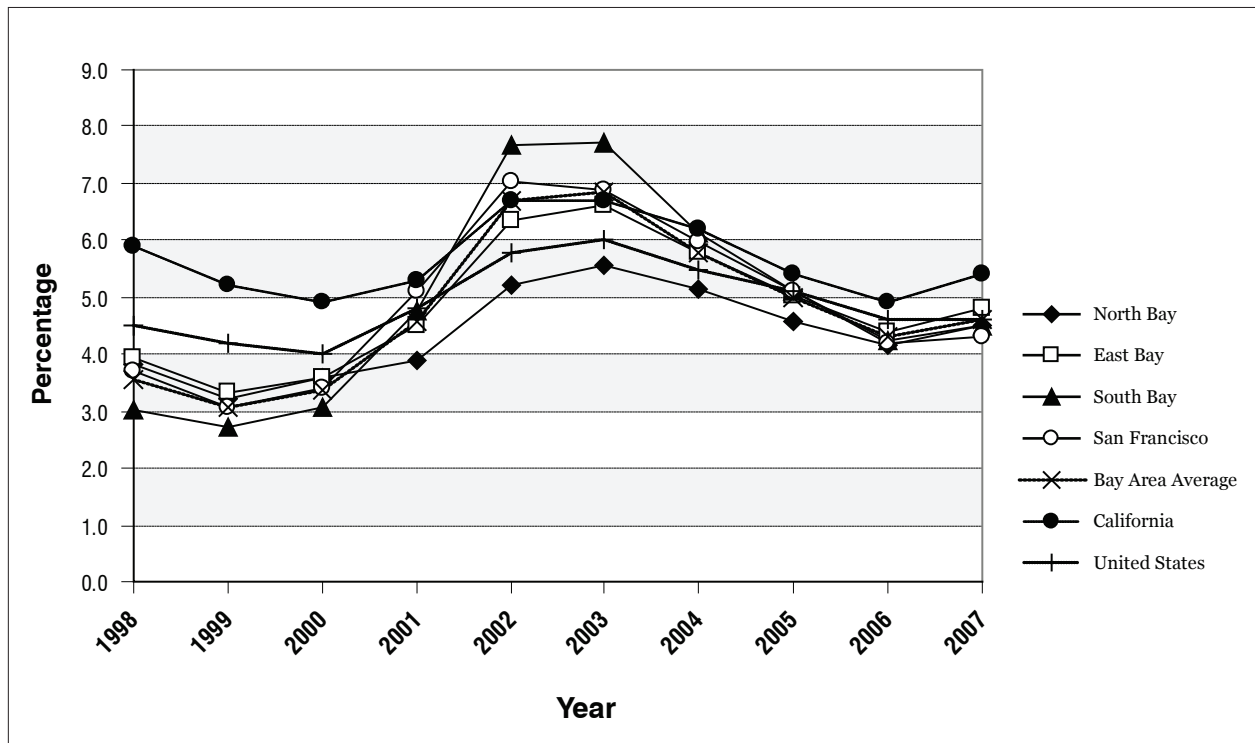


TABLE 2.2.1 BAY AREA EMPLOYMENT BY INDUSTRY GROUP, 1998-2007

This table presents information about those who work in the Bay Area. It conveys the number of people working in each industry group. The breakdown for each Bay Area sub-region is presented in Tables 2.2.2 - 2.2.4. All tables utilize NAICS industrial categories for the entire period of analysis.

Number of Jobs (000s)

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Farm	26.1	25.9	27.0	28.1	27.2	25.8	25.4	22.5	20.2	20.6
Natural Resources, Mining & Construction	160.2	177.1	191.0	198.0	186.8	191.1	187.6	194.2	196.0	194.7
Manufacturing	479.0	465.4	486.9	468.3	409.3	370.8	361.9	353.8	352.0	345.0
Trade, Transportation & Utilities	593.1	604.0	617.6	612.3	584.3	566.4	558.4	562.5	564.1	571.3
Information	110.0	122.2	151.7	146.8	127.0	117.0	114.0	112.4	112.5	113.3
Financial Activities	194.4	197.8	198.9	213.3	211.4	211.5	209.2	213.3	213.4	206.1
Professional & Business Services	588.0	621.6	670.9	619.8	541.5	517.0	518.1	529.7	549.8	572.4
Educational & Health Services	328.6	335.6	334.9	344.0	349.6	355.6	358.6	362.3	373.1	380.0
Leisure & Hospitality	283.9	291.1	299.0	306.3	302.2	302.9	306.7	312.3	322.0	329.9
Other Services	109.1	109.1	111.1	114.8	115.2	112.8	111.2	110.4	109.8	111.5
Government	441.7	454.0	468.0	471.1	484.5	476.6	467.4	471.1	473.2	485.8
TOTAL	3,314.1	3,403.8	3,557.0	3,522.8	3,339.0	3,247.5	3,218.5	3,244.5	3,286.1	3,330.6

Annual Percentage Distribution

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Farm	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.7	0.6	0.6
Natural Resources, Mining & Construction	4.8	5.2	5.4	5.6	5.6	5.9	5.8	6.0	6.0	5.8
Manufacturing	14.5	13.7	13.7	13.3	12.3	11.4	11.2	10.9	10.7	10.4
Trade, Transportation & Utilities	17.9	17.7	17.4	17.4	17.5	17.4	17.3	17.3	17.2	17.2
Information	3.3	3.6	4.3	4.2	3.8	3.6	3.5	3.5	3.4	3.4
Financial Activities	5.9	5.8	5.6	6.1	6.3	6.5	6.5	6.6	6.5	6.2
Professional & Business Services	17.7	18.3	18.9	17.6	16.2	15.9	16.1	16.3	16.7	17.2
Educational & Health Services	9.9	9.9	9.4	9.8	10.5	10.9	11.1	11.2	11.4	11.4
Leisure & Hospitality	8.6	8.6	8.4	8.7	9.1	9.3	9.5	9.6	9.8	9.9
Other Services	3.3	3.2	3.1	3.3	3.5	3.5	3.5	3.4	3.3	3.3
Government	13.3	13.3	13.2	13.4	14.5	14.7	14.5	14.5	14.4	14.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Farm	-0.8	4.2	4.1	-3.2	-5.1	-1.6	-11.4	-10.2	2.0
Natural Resources, Mining & Construction	10.5	7.8	3.7	-5.7	2.3	-1.8	3.5	0.9	-0.7
Manufacturing	-2.8	4.6	-3.8	-12.6	-9.4	-2.4	-2.2	-0.5	-2.0
Trade, Transportation & Utilities	1.8	2.3	-0.9	-4.6	-3.1	-1.4	0.7	0.3	1.3
Information	11.1	24.1	-3.2	-13.5	-7.9	-2.6	-1.4	0.1	0.7
Financial Activities	1.7	0.6	7.2	-0.9	0.0	-1.1	2.0	0.0	-3.4
Professional & Business Services	5.7	7.9	-7.6	-12.6	-4.5	0.2	2.2	3.8	4.1
Educational & Health Services	2.1	-0.2	2.7	1.6	1.7	0.8	1.0	3.0	1.8
Leisure & Hospitality	2.5	2.7	2.4	-1.3	0.2	1.3	1.8	3.1	2.5
Other Services	0.0	1.8	3.3	0.3	-2.1	-1.4	-0.7	-0.5	1.5
Government	2.8	3.1	0.7	2.8	-1.6	-1.9	0.8	0.4	2.7
TOTAL	2.7	4.5	-1.0	-5.2	-2.7	-0.9	0.8	1.3	1.4

Source:

• California Employment Development Department, Industry Employment & Labor Force - by Annual Average; March Benchmark.
<http://www.labormarketinfo.edd.ca.gov/?PAGEID=171>

TABLE 2.2.2 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1998-2007 – NUMBER OF JOBS

This table contains the disaggregation of Table 2.2.1 by Bay Area sub-regions.

Number of Jobs (000s)

TOTAL	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	449.7	468.5	484.4	496.4	493.3	499.2	494.0	497.0	501.9	503.4
East Bay	978.4	1,009.8	1,047.0	1,057.8	1,042.9	1,028.6	1,024.1	1,035.7	1,047.8	1,049.5
South Bay	1,322.0	1,350.5	1,427.3	1,395.4	1,268.0	1,206.6	1,196.6	1,202.6	1,215.5	1,238.2
San Francisco	564.0	575.0	598.3	573.2	534.8	513.1	503.8	509.2	520.9	539.5
Regional Total	3,314.1	3,403.8	3,557.0	3,522.8	3,339.0	3,247.5	3,218.5	3,244.5	3,286.1	3,330.6

Farm										
North Bay	13.6	13.6	14.6	15.0	14.3	13.3	13.5	12.5	12.7	13.1
East Bay	2.1	1.9	2.3	3.0	3.0	3.0	2.6	1.5	1.5	1.6
South Bay	10.1	10.2	9.8	9.9	9.6	9.2	8.9	8.4	5.7	5.7
San Francisco	0.3	0.2	0.3	0.2	0.3	0.3	0.4	0.1	0.3	0.2
Regional Total	26.1	25.9	27.0	28.1	27.2	25.8	25.4	22.5	20.2	20.6

Natural Resources, Mining & Construction										
North Bay	27.9	31.7	35.2	37.2	37.5	46.0	39.5	41.6	41.0	38.5
East Bay	55.4	62.3	67.9	71.3	67.8	68.0	70.3	75.1	74.6	73.6
South Bay	59.9	64.8	69.0	69.8	63.6	59.8	60.9	60.8	62.9	64.3
San Francisco	17.0	18.3	18.9	19.7	17.9	17.3	16.9	16.7	17.5	18.3
Regional Total	160.2	177.1	191.0	198.0	186.8	191.1	187.6	194.2	196.0	194.7

Manufacturing										
North Bay	52.1	53.6	54.7	54.9	51.1	47.9	47.3	46.8	46.6	45.8
East Bay	114.6	112.1	116.5	113.2	103.6	98.0	99.1	95.4	96.9	93.7
South Bay	287.1	276.6	294.1	282.4	239.5	211.8	203.3	199.8	197.4	194.4
San Francisco	25.2	23.1	21.6	17.8	15.1	13.1	12.2	11.8	11.1	11.1
Regional Total	479.0	465.4	486.9	468.3	409.3	370.8	361.9	353.8	352.0	345.0

Trade, Transportation & Utilities										
North Bay	82.3	84.3	84.9	87.1	87.7	89.3	89.4	90.1	90.6	91.3
East Bay	195.6	202.7	207.6	210.0	204.6	197.2	192.8	195.2	195.4	198.1
South Bay	233.5	236.9	243.1	237.2	217.8	208.7	206.5	207.2	208.4	212.7
San Francisco	81.7	80.1	82.0	78.0	74.2	71.2	69.7	70.0	69.7	69.2
Regional Total	593.1	604.0	617.6	612.3	584.3	566.4	558.4	562.5	564.1	571.3

Information										
North Bay	11.4	11.0	11.2	11.2	10.5	10.0	9.8	9.1	7.7	7.7
East Bay	34.3	35.0	39.0	37.7	35.2	32.6	31.0	30.4	29.8	29.4
South Bay	42.7	50.3	66.8	68.1	57.6	53.9	53.7	55.3	56.9	56.8
San Francisco	21.6	25.9	34.7	29.8	23.7	20.5	19.5	17.6	18.1	19.4
Regional Total	110.0	122.2	151.7	146.8	127.0	117.0	114.0	112.4	112.5	113.3

CONTINUED >

Number of Jobs (000s)

Financial Activities	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	24.8	25.8	26.3	26.9	27.7	28.5	27.8	27.9	28.0	26.5
East Bay	48.8	50.0	50.6	58.6	62.5	67.7	67.2	70.5	69.0	62.3
South Bay	60.0	60.4	59.1	59.6	57.7	56.2	56.5	57.4	58.4	58.3
San Francisco	60.8	61.6	62.9	68.2	63.5	59.1	57.7	57.5	58.0	59.0
Regional Total	194.4	197.8	198.9	213.3	211.4	211.5	209.2	213.3	213.4	206.1

Professional & Business Services										
North Bay	49.6	53.9	57.3	55.6	53.7	53.2	55.3	55.4	58.8	60.2
East Bay	151.6	160.2	170.2	159.0	149.6	144.9	146.7	150.6	155.0	155.5
South Bay	256.3	273.3	299.2	275.5	226.6	215.5	215.6	218.9	225.0	239.4
San Francisco	130.5	134.2	144.2	129.7	111.6	103.4	100.5	104.8	111.0	117.3
Regional Total	588.0	621.6	670.9	619.8	541.5	517.0	518.1	529.7	549.8	572.4

Educational & Health Services										
North Bay	53.8	55.5	57.6	60.1	61.5	61.8	61.7	62.1	63.0	64.2
East Bay	105.8	109.2	110.7	112.5	114.7	117.0	117.9	118.6	121.9	124.7
South Bay	113.1	114.0	114.0	119.5	121.7	123.6	125.2	127.0	132.2	133.6
San Francisco	55.9	56.9	52.6	51.9	51.7	53.2	53.8	54.6	56.0	57.5
Regional Total	328.6	335.6	334.9	344.0	349.6	355.6	358.6	362.3	373.1	380.0

Leisure & Hospitality										
North Bay	46.6	48.4	49.8	52.0	52.8	53.6	54.0	54.2	54.9	56.3
East Bay	70.8	72.4	73.7	77.9	79.9	80.4	80.6	82.6	85.7	87.5
South Bay	98.4	99.6	103.3	104.2	99.6	99.3	101.6	103.7	107.4	109.7
San Francisco	68.1	70.7	72.2	72.2	69.9	69.6	70.5	71.8	74.0	76.4
Regional Total	283.9	291.1	299.0	306.3	302.2	302.9	306.7	312.3	322.0	329.9

Other Services										
North Bay	16.1	16.1	16.4	16.6	16.7	16.9	17.2	16.8	17.0	17.0
East Bay	30.5	31.0	31.9	35.8	37.8	37.5	37.0	35.8	35.9	36.2
South Bay	36.6	36.8	37.7	37.5	38.2	36.7	36.0	36.1	35.5	36.4
San Francisco	25.9	25.2	25.1	24.9	22.5	21.7	21.0	21.7	21.4	21.9
Regional Total	109.1	109.1	111.1	114.8	115.2	112.8	111.2	110.4	109.8	111.5

Government										
North Bay	71.5	74.6	76.4	79.8	79.8	78.7	78.5	80.5	81.6	82.8
East Bay	168.9	173.0	176.6	178.8	184.2	182.3	178.9	180.0	182.1	186.9
South Bay	124.3	127.6	131.2	131.7	136.1	131.9	128.4	128.0	125.7	126.9
San Francisco	77.0	78.8	83.8	80.8	84.4	83.7	81.6	82.6	83.8	89.2
Regional Total	441.7	454.0	468.0	471.1	484.5	476.6	467.4	471.1	473.2	485.8

Source:

• California Employment Development Department, Industry Employment & Labor Force - by Annual Average
<http://www.labormarketinfo.edd.ca.gov/?PAGEID=171>

TABLE 2.2.3 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1998-2007 – ANNUAL PERCENTAGE DISTRIBUTION

This table contains the percentage distribution across the Bay Area of the industry group data from Table 2.2.2.

Annual Percentage Distribution

TOTAL	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	13.6	13.8	13.6	14.1	14.8	15.4	15.3	15.3	15.3	15.1
East Bay	29.5	29.7	29.4	30.0	31.2	31.7	31.8	31.9	31.9	31.5
South Bay	39.9	39.7	40.1	39.6	38.0	37.2	37.2	37.1	37.0	37.2
San Francisco	17.0	16.9	16.8	16.3	16.0	15.8	15.7	15.7	15.9	16.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Farm

North Bay	52.1	52.5	54.1	53.4	52.6	51.6	53.1	55.6	62.9	63.6
East Bay	8.0	7.3	8.5	10.7	11.0	11.6	10.2	6.7	7.4	7.8
South Bay	38.7	39.4	36.3	35.2	35.3	35.7	35.0	37.3	28.2	27.7
San Francisco	1.1	0.8	1.1	0.7	1.1	1.2	1.6	0.4	1.5	1.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Natural Resources, Mining & Construction

North Bay	17.4	17.9	18.4	18.8	20.1	24.1	21.1	21.4	20.9	19.8
East Bay	34.6	35.2	35.5	36.0	36.3	35.6	37.5	38.7	38.1	37.8
South Bay	37.4	36.6	36.1	35.3	34.0	31.3	32.5	31.3	32.1	33.0
San Francisco	10.6	10.3	9.9	9.9	9.6	9.1	9.0	8.6	8.9	9.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Manufacturing

North Bay	10.9	11.5	11.2	11.7	12.5	12.9	13.1	13.2	13.2	13.3
East Bay	23.9	24.1	23.9	24.2	25.3	26.4	27.4	27.0	27.5	27.2
South Bay	59.9	59.4	60.4	60.3	58.5	57.1	56.2	56.5	56.1	56.3
San Francisco	5.3	5.0	4.4	3.8	3.7	3.5	3.4	3.3	3.2	3.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Trade, Transportation & Utilities

North Bay	13.9	14.0	13.7	14.2	15.0	15.8	16.0	16.0	16.1	16.0
East Bay	33.0	33.6	33.6	34.3	35.0	34.8	34.5	34.7	34.6	34.7
South Bay	39.4	39.2	39.4	38.7	37.3	36.8	37.0	36.8	36.9	37.2
San Francisco	13.8	13.3	13.3	12.7	12.7	12.6	12.5	12.4	12.4	12.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Information

North Bay	10.4	9.0	7.4	7.6	8.3	8.5	8.6	8.1	6.8	6.8
East Bay	31.2	28.6	25.7	25.7	27.7	27.9	27.2	27.0	26.5	25.9
South Bay	38.8	41.2	44.0	46.4	45.4	46.1	47.1	49.2	50.6	50.1
San Francisco	19.6	21.2	22.9	20.3	18.7	17.5	17.1	15.7	16.1	17.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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Annual Percentage Distribution

Financial Activities	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	12.8	13.0	13.2	12.6	13.1	13.5	13.3	13.1	13.1	12.9
East Bay	25.1	25.3	25.4	27.5	29.6	32.0	32.1	33.1	32.3	30.2
South Bay	30.9	30.5	29.7	27.9	27.3	26.6	27.0	26.9	27.4	28.3
San Francisco	31.3	31.1	31.6	32.0	30.0	27.9	27.6	27.0	27.2	28.6
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Professional & Business Services										
North Bay	8.4	8.7	8.5	9.0	9.9	10.3	10.7	10.5	10.7	10.5
East Bay	25.8	25.8	25.4	25.7	27.6	28.0	28.3	28.4	28.2	27.2
South Bay	43.6	44.0	44.6	44.4	41.8	41.7	41.6	41.3	40.9	41.8
San Francisco	22.2	21.6	21.5	20.9	20.6	20.0	19.4	19.8	20.2	20.5
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Educational & Health Services										
North Bay	16.4	16.5	17.2	17.5	17.6	17.4	17.2	17.1	16.9	16.9
East Bay	32.2	32.5	33.1	32.7	32.8	32.9	32.9	32.7	32.7	32.8
South Bay	34.4	34.0	34.0	34.7	34.8	34.8	34.9	35.1	35.4	35.2
San Francisco	17.0	17.0	15.7	15.1	14.8	15.0	15.0	15.1	15.0	15.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Leisure & Hospitality										
North Bay	16.4	16.6	16.7	17.0	17.5	17.7	17.6	17.4	17.0	17.1
East Bay	24.9	24.9	24.6	25.4	26.4	26.5	26.3	26.4	26.6	26.5
South Bay	34.7	34.2	34.5	34.0	33.0	32.8	33.1	33.2	33.4	33.3
San Francisco	24.0	24.3	24.1	23.6	23.1	23.0	23.0	23.0	23.0	23.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Other Services										
North Bay	14.8	14.8	14.8	14.5	14.5	15.0	15.5	15.2	15.5	15.2
East Bay	28.0	28.4	28.7	31.2	32.8	33.2	33.3	32.4	32.7	32.5
South Bay	33.5	33.7	33.9	32.7	33.2	32.5	32.4	32.7	32.3	32.6
San Francisco	23.7	23.1	22.6	21.7	19.5	19.2	18.9	19.7	19.5	19.6
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Government										
North Bay	16.2	16.4	16.3	16.9	16.5	16.5	16.8	17.1	17.2	17.0
East Bay	38.2	38.1	37.7	38.0	38.0	38.3	38.3	38.2	38.5	38.5
South Bay	28.1	28.1	28.0	28.0	28.1	27.7	27.5	27.2	26.6	26.1
San Francisco	17.4	17.4	17.9	17.2	17.4	17.6	17.5	17.5	17.7	18.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source:

- California Employment Development Department, Industry Employment & Labor Force - by Annual Average
<http://www.labormarketinfo.edd.ca.gov/?PAGEID=171>

TABLE 2.2.4 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1998-2007 – PERCENTAGE CHANGE

This table contains the annual percentage change in employment by industry group within each sub-region of the Bay Area.

Percentage Change									
TOTAL	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	4.2	3.4	2.5	-0.6	1.2	-1.0	0.6	1.0	0.3
East Bay	3.2	3.7	1.0	-1.4	-1.4	-0.4	1.1	1.2	0.2
South Bay	2.2	5.7	-2.2	-9.1	-4.8	-0.8	0.5	1.1	1.9
San Francisco	2.0	4.1	-4.2	-6.7	-4.1	-1.8	1.1	2.3	3.6
Regional Total	2.7	4.5	-1.0	-5.2	-2.7	-0.9	0.8	1.3	1.4
Farm									
North Bay	0.0	7.4	2.7	-4.7	-7.0	1.5	-7.4	1.6	3.1
East Bay	-9.5	21.1	30.4	0.0	0.0	-13.3	-42.3	0.0	6.7
South Bay	1.0	-3.9	1.0	-3.0	-4.2	-3.3	-5.6	-32.1	0.0
San Francisco	-33.3	50.0	-33.3	50.0	0.0	33.3	-75.0	200.0	-33.3
Regional Total	-0.8	4.2	4.1	-3.2	-5.1	-1.6	-11.4	-10.2	2.0
Natural Resources, Mining & Construction									
North Bay	13.6	11.0	5.7	0.8	22.7	-14.1	5.3	-1.4	-6.1
East Bay	12.5	9.0	5.0	-4.9	0.3	3.4	6.8	-0.7	-1.3
South Bay	8.2	6.5	1.2	-8.9	-6.0	1.8	-0.2	3.5	2.2
San Francisco	7.6	3.3	4.2	-9.1	-3.4	0.0	0.0	0.0	4.6
Regional Total	10.5	7.8	3.7	-5.7	2.3	-1.8	3.5	0.9	-0.7
Manufacturing									
North Bay	2.9	2.1	0.4	-6.9	-6.3	-1.3	-1.1	-0.4	-1.7
East Bay	-2.2	3.9	-2.8	-8.5	-5.4	1.1	-3.7	1.6	-3.3
South Bay	-3.7	6.3	-4.0	-15.2	-11.6	-4.0	-1.7	-1.2	-1.5
San Francisco	-8.3	-6.5	-17.6	-15.2	-13.2	-6.9	-3.3	-5.9	0.0
Regional Total	-2.8	4.6	-3.8	-12.6	-9.4	-2.4	-2.2	-0.5	-2.0
Trade, Transportation & Utilities									
North Bay	2.4	0.7	2.6	0.7	1.8	0.1	0.8	0.6	0.8
East Bay	3.6	2.4	1.2	-2.6	-3.6	-2.2	1.2	0.1	1.4
South Bay	1.5	2.6	-2.4	-8.2	-4.2	-1.1	0.3	0.6	2.1
San Francisco	-2.0	2.4	-4.9	-4.9	-4.0	-2.1	0.4	-0.4	-0.7
Regional Total	1.8	2.3	-0.9	-4.6	-3.1	-1.4	0.7	0.3	1.3
Information									
North Bay	-3.5	1.8	0.0	-6.2	-4.8	-2.0	-7.1	-15.4	0.0
East Bay	2.0	11.4	-3.3	-6.6	-7.4	-4.9	-1.9	-2.0	-1.3
South Bay	17.8	32.8	1.9	-15.4	-6.4	-0.4	3.0	2.9	-0.2
San Francisco	19.9	34.0	-14.1	-20.5	-13.5	-4.9	-9.7	2.8	7.2
Regional Total	11.1	24.1	-3.2	-13.5	-7.9	-2.6	-1.4	0.1	0.7

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Percentage Change

Financial Activities	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	4.0	1.9	2.3	3.0	2.9	-2.5	0.4	0.4	-5.4
East Bay	2.5	1.2	15.8	6.7	8.3	-0.7	4.9	-2.1	-9.7
South Bay	0.7	-2.2	0.8	-3.2	-2.6	0.5	1.6	1.7	-0.2
San Francisco	1.3	2.1	8.4	-6.9	-6.9	-2.4	-0.3	0.9	1.7
Regional Total	1.7	0.6	7.2	-0.9	0.0	-1.1	2.0	0.0	-3.4

Professional & Business Services

North Bay	8.7	6.3	-3.0	-3.4	-0.9	3.9	0.2	6.1	2.4
East Bay	5.7	6.2	-6.6	-5.9	-3.1	1.2	2.7	2.9	0.3
South Bay	6.6	9.5	-7.9	-17.7	-4.9	0.0	1.5	2.8	6.4
San Francisco	2.8	7.5	-10.1	-14.0	-7.3	-2.8	4.3	5.9	5.7
Regional Total	5.7	7.9	-7.6	-12.6	-4.5	0.2	2.2	3.8	4.1

Educational & Health Services

North Bay	3.2	3.8	4.3	2.3	0.5	-0.2	0.6	1.4	1.9
East Bay	3.2	1.4	1.6	2.0	2.0	0.8	0.6	2.8	2.3
South Bay	0.8	0.0	4.8	1.8	1.6	1.3	1.4	4.1	1.1
San Francisco	1.8	-7.6	-1.3	-0.4	2.9	1.1	1.5	2.6	2.7
Regional Total	2.1	-0.2	2.7	1.6	1.7	0.8	1.0	3.0	1.8

Leisure & Hospitality

North Bay	3.9	2.9	4.4	1.5	1.5	0.7	0.4	1.3	2.6
East Bay	2.3	1.8	5.7	2.6	0.6	0.2	2.5	3.8	2.1
South Bay	1.2	3.7	0.9	-4.4	-0.3	2.3	2.1	3.6	2.1
San Francisco	3.8	2.1	0.0	-3.2	-0.4	1.3	1.8	3.1	3.2
Regional Total	2.5	2.7	2.4	-1.3	0.2	1.3	1.8	3.1	2.5

Other Services

North Bay	0.0	1.9	1.2	0.6	1.2	1.8	-2.3	1.2	0.0
East Bay	1.6	2.9	12.2	5.6	-0.8	-1.3	-3.2	0.3	0.8
South Bay	0.5	2.4	-0.5	1.9	-3.9	-1.9	0.3	-1.7	2.5
San Francisco	-2.7	-0.4	-0.8	-9.6	-3.6	-3.2	3.3	-1.4	2.3
Regional Total	0.0	1.8	3.3	0.3	-2.1	-1.4	-0.7	-0.5	1.5

Government

North Bay	4.3	2.4	4.5	0.0	-1.4	-0.3	2.5	1.4	1.5
East Bay	2.4	2.1	1.2	3.0	-1.0	-1.9	0.6	1.2	2.6
South Bay	2.7	2.8	0.4	3.3	-3.1	-2.7	-0.3	-1.8	1.0
San Francisco	2.3	6.3	-3.6	4.5	-0.8	-2.5	1.2	1.5	6.4
Regional Total	2.8	3.1	0.7	2.8	-1.6	-1.9	0.8	0.4	2.7

Source:

• California Employment Development Department, Industry Employment & Labor Force - by Annual Average
<http://www.labormarketinfo.edd.ca.gov/?PAGEID=171>

3.0 EMPLOYMENT

This Chapter provides information about the employment trends in San Francisco from 1998 to 2007. The employment data presented in this chapter are based on the payroll jobs in San Francisco provided by the California Employment Development Department (EDD). The data are reported as annual average based on the quarterly average employment data. It is important to note that these employment data differ from the benchmark data provided by EDD on its web site (<http://www.calmis.cahwnet.gov>). The latter data omit private household employment data (NAICS 814) and are adjusted throughout the year.

Employment data are presented by the major economy sectors under each type of land use category. In 2001, economic sectors started being organized according to North American Industry Classification system (NAICS). From 1998 to 2000, economic sectors were organized according to Standard Industrial Classification system (SIC). Both industry classification systems are discussed in Chapter 1.2 – Data Formats. Table 1.2 in Chapter 1 shows the closest match between SIC economic sectors and NAICS economic sectors. It is not possible to get a 100% match between their industry groups because under the NAICS, certain industries have been moved from one economic sector to another. Due to restructuring of economic sectors, employment numbers may appear significantly higher or lower in certain economic sectors when compared to previous years' employment numbers.

Employment is defined as number of employees who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. A person holding a job in San Francisco is part of the San Francisco employment pool regardless of his or her place of residence. A person holding more than one job is counted separately for each job. However, the EDD wage and salary employment data do not include self-employed persons, of which there were approximately 61,000 in 2005 according to the City of San Francisco's Office of the Treasurer and Tax Collector. The EDD wage and salary employment data also do not include unpaid family workers, volunteers, or persons involved in trade disputes.

Employment data is reported both for the entire city and the city's ten Commerce and Industry Districts under five Land Use categories - Office, Retail, Industrial, Hotel, and Cultural/Institutional/Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Chapter 1.2 - Data Formats.

Employment data reported by land use category will not be consistent with publications prior to 2001. Public administration jobs have been included in different land use categories in other publications. This publication includes public administration jobs in the Office land use category for all years; necessary adjustments were made to data from previous years.

Public administration jobs were also classified as Office land uses in the 2001 publication. From 1998-2000, public administration jobs were parsed out in Office, Industrial, and CIE land use categories.

Table 3.1 shows employment data by Land Use Category from 1998 to 2007. Tables 3.2.1 through 3.2.4 show employment data by Industry Group within each Land Use Category in San Francisco from 1998 to 2007. Table 3.3 presents San Francisco employment in its geographic context. It shows employment data by Land Use Category in ten Commerce and Industry Districts in San Francisco in 2007. It also shows employment under an Unclassified category. This category represents home-based business establishments and organizations, particularly care-givers. These groups do not register a physical address with the State and thus are unable to be classified into a specific geographic district.

Employment by Land Use Category

- *Table 3.1 San Francisco Employment by Land Use Category, 1998-2007* — All land use categories except Hotel showed gains in employment in 2007. Even within the Hotel land use category, however, the loss of jobs was minimal. Industrial employment increased for the first time in ten years. Overall, the number of jobs in San Francisco increased by 3.8%, a healthier gain from the previous year and a positive sign of recovery.
- *Table 3.2.1 Office Employment by Industry Groups, 1998-2007* — Office services, by far the largest office group, posted a 5.6% gain in 2007. All the other Industry Groups except for Agriculture also posted job gains.
- *Table 3.2.2 Retail Employment by Industry Group, 1998-2007* — Within the retail land use category, growth patterns continued to fluctuate even as all industry groups maintained approximately the same share of the industry in the last four years. Within this land use category, only the Other Retail Stores group posted job losses in 2007. An especially strong rate of growth was seen in General Merchandise.
- *Table 3.2.3 Industrial Employment by Industry Group, 1998-2007* — Within the Industrial land use category, the Utilities, Apparel Manufacturing, Food Manufacturing, and Transportation groups experienced job losses. All other Industrial Industry Groups experienced job growth in 2007. The Construction group increases accounted for almost 64% of all the Industrial employment gains.
- *Table 3.2.4 Cultural/Institutional/Educational Employment by Industry Group, 1998-2007* — All CIE Industry Groups showed employment gains in 2007, with Art & Recreation showing the healthiest gain.

Employment by Geographic District

- *Table 3.3 Employment by Commerce and Industry District and Land Use Category, 2007* — Most of the jobs are located in the Financial (32%) and South of Market (21.7%) districts. The Mission (2.8%), North Beach (3.1%), and Van Ness (3.2%) districts have the fewest number of jobs. Employment in the Unclassified district (jobs that are home-based) accounted for about 4% of the total jobs.

TABLE 3.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1998-2007

This table contains the number of jobs in each of the five major non-residential land use categories in San Francisco. Data is presented from 1998-2007, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1998-2000 data and 2001-2007 data (see Chapter 1.2 - Data Formats for a description of land use categories and an SIC-NAICS discussion). Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 3.1.1 (a snapshot of job distribution in 2007) and 3.1.2 (a look at ten-year trends).

Annual Average Number of Jobs

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	220,912	229,285	243,290	236,959	213,813	201,492	193,180	195,521	206,271	214,661
Retail	94,220	97,159	103,508	101,505	93,735	95,599	95,006	96,033	98,294	102,253
Industrial	120,961	117,588	116,540	107,837	97,860	93,726	89,037	84,693	81,699	84,986
Hotel	19,498	19,522	18,862	17,962	16,477	17,438	18,090	18,424	19,087	19,070
CIE	120,526	127,611	126,066	122,222	122,254	124,882	127,962	128,726	130,645	135,361
TOTAL	576,117	591,166	608,266	586,485	546,960	533,136	523,274	523,396	535,996	556,330

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	38.3	38.8	40.0	40.4	39.1	37.8	36.9	37.4	38.5	38.6
Retail	16.4	16.4	17.0	17.3	17.6	17.9	18.2	18.3	18.3	18.4
Industrial	21.0	19.9	19.2	18.4	17.9	17.6	17.0	16.2	15.2	15.3
Hotel	3.4	3.3	3.1	3.1	3.0	3.3	3.5	3.5	3.6	3.4
CIE	20.9	21.6	20.7	20.8	22.3	23.4	24.5	24.6	24.4	24.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07
Office	3.8	6.1	N/A	-9.8	-5.8	-4.1	1.2	5.5	4.1
Retail	3.1	6.5	N/A	-4.9	-1.0	-0.6	1.1	2.4	4.0
Industrial	-2.8	-0.9	N/A	-9.3	-4.2	-5.0	-4.9	-3.5	4.0
Hotel	0.1	-3.4	N/A	-8.3	5.8	3.7	1.8	3.6	-0.1
CIE	5.9	-1.2	N/A	0.0	2.1	2.5	0.6	1.5	3.6
TOTAL	2.6	2.9	N/A	-6.7	-2.5	-1.8	0.0	2.4	3.8

Notes:

- Due to rounding, figures may not add to the total shown.
- CIE = Cultural, Institutional, or Educational
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- From 1997-2005, annual average includes last quarter of previous year, and first three quarters of current year.

Sources:

- California Employment Development Department
- Data not publicly available

FIGURE 3.1.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2007

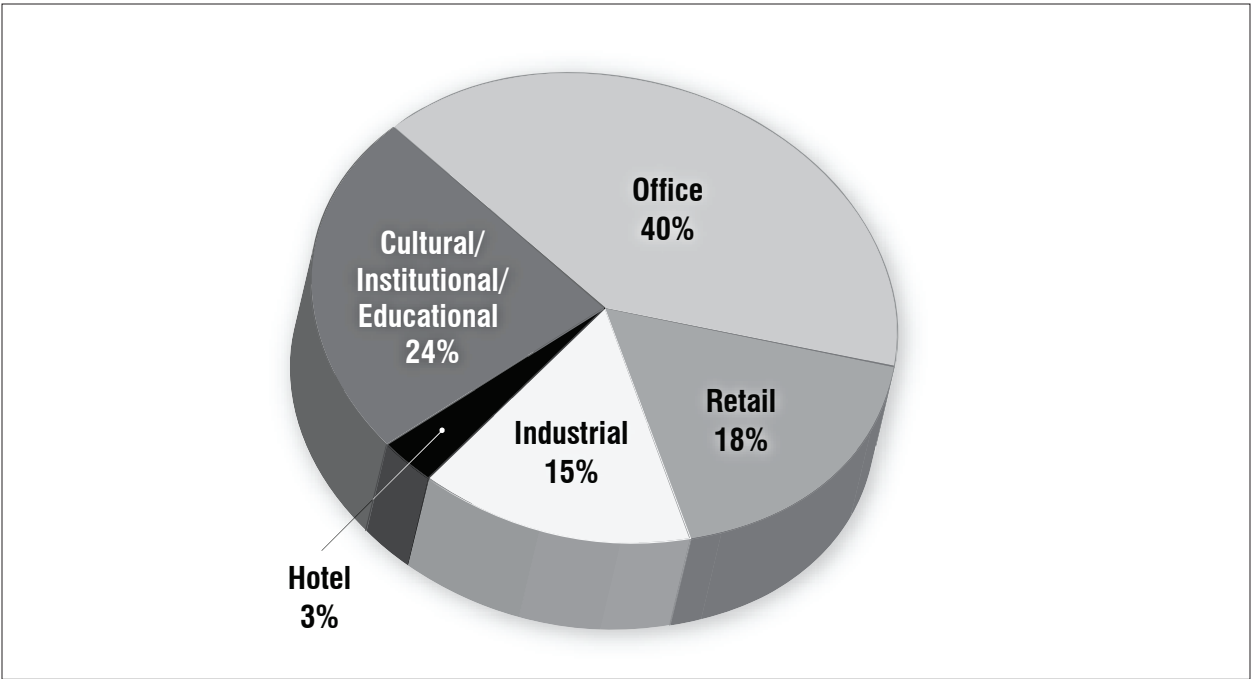


FIGURE 3.1.2 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1998-2007

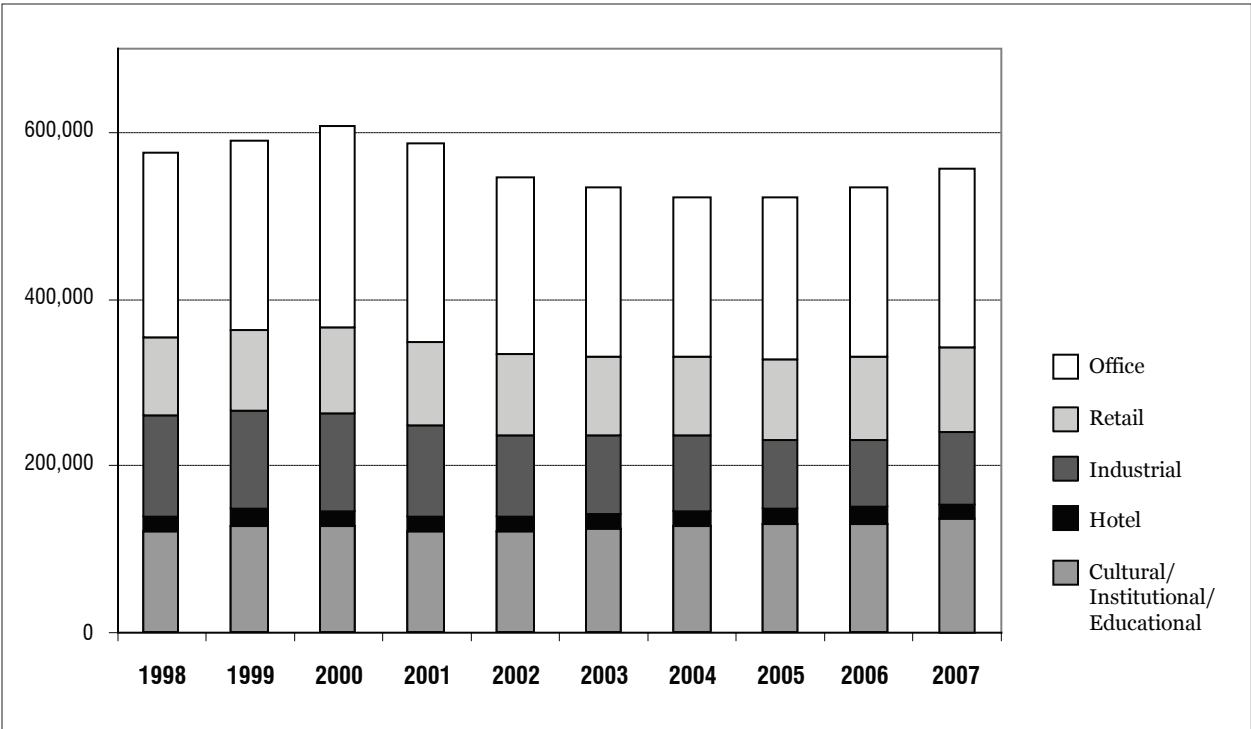


TABLE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1998-2007

This table presents job trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 3.2.1 presents the job trends graphically.

Annual Average Number of Jobs

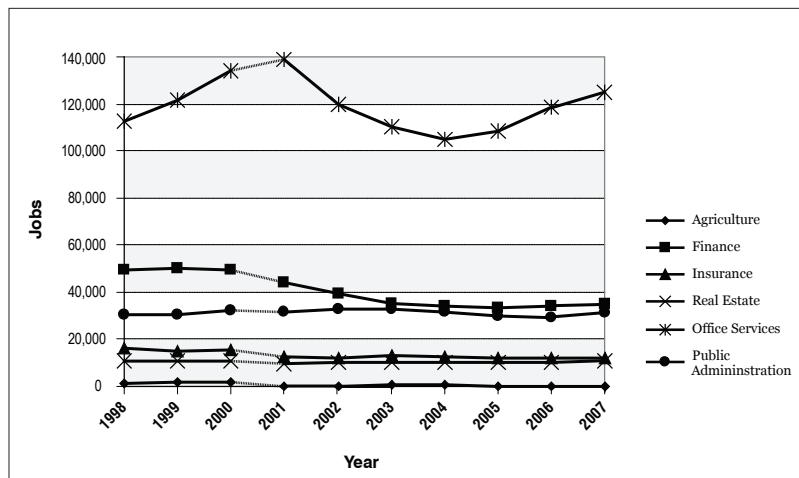
Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Agriculture	1,460	1,732	1,674	172	173	404	385	228	241	220
Finance	49,454	49,886	49,366	44,064	39,381	35,314	33,748	33,554	34,239	34,975
Insurance	16,083	14,855	15,448	12,417	12,070	12,897	12,527	12,174	11,962	12,249
Real Estate	10,953	10,741	10,576	9,763	9,866	10,177	9,910	10,033	10,316	10,704
Office Services	112,783	121,456	133,830	138,862	119,468	109,970	104,611	108,312	118,328	124,973
Public Administration	30,179	30,615	32,395	31,681	32,834	32,718	31,635	29,834	29,339	31,490
TOTAL	220,912	229,285	243,290	236,959	213,791	201,480	192,816	194,136	204,425	214,611

Annual Percentage Distribution

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Agriculture	0.7	0.8	0.7	0.1	0.1	0.2	0.2	0.1	0.1	0.1
Finance	22.4	21.8	20.3	18.6	18.4	17.5	17.5	17.3	16.7	16.3
Insurance	7.3	6.5	6.3	5.2	5.6	6.4	6.5	6.3	5.9	5.7
Real Estate	5.0	4.7	4.3	4.1	4.6	5.1	5.1	5.2	5.0	5.0
Office Services	51.1	53.0	55.0	58.6	55.9	54.6	54.3	55.8	57.9	58.2
Public Administration	13.7	13.4	13.3	13.4	15.4	16.2	16.4	15.4	14.4	14.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Agriculture	18.7	-3.4	N/A	0.9	133.3	-4.9	-40.8	5.8	-8.5
Finance	0.9	-1.0	N/A	-10.6	-10.3	-4.4	-0.6	2.0	2.1
Insurance	-7.6	4.0	N/A	-2.8	6.8	-2.9	-2.8	-1.7	2.4
Real Estate	-1.9	-1.5	N/A	1.0	3.2	-2.6	1.2	2.8	3.8
Office Services	7.7	10.2	N/A	-14.0	-8.0	-4.9	3.5	9.2	5.6
Public Administration	1.4	5.8	N/A	3.6	-0.4	-3.3	-5.7	-1.7	7.3
TOTAL	3.8	6.1	N/A	-9.8	-5.8	-4.3	0.7	5.3	5.0

FIGURE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1998-2007**Notes:**

- Due to rounding, figures may not add to the total shown.
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Agriculture refers to those working in offices whose line of work is related to agriculture.
- Office Services consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical Services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.2.2 RETAIL EMPLOYMENT BY INDUSTRY GROUP, 1998-2007

This table presents job trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 3.2.2 presents the job trends graphically.

Annual Average Number of Jobs

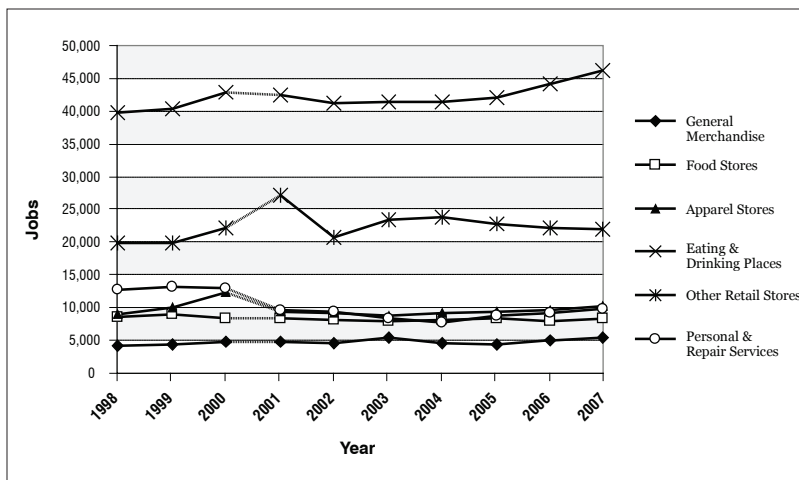
Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
General Merchandise	4,219	4,372	4,800	4,736	4,631	5,543	4,662	4,401	4,921	5,486
Food Stores	8,555	9,041	8,448	8,311	8,210	8,051	8,144	8,394	7,940	8,382
Apparel Stores	9,077	10,135	12,259	9,348	9,209	8,871	9,285	9,509	9,698	10,313
Eating & Drinking Places	39,770	40,481	42,820	42,415	41,214	41,358	41,378	42,139	44,183	46,260
Other Retail Stores	19,814	19,893	22,174	27,165	20,762	23,356	23,859	22,794	22,247	22,033
Personal & Repair Services	12,785	13,237	13,006	9,531	9,349	8,419	7,678	8,795	9,306	9,780
TOTAL	94,220	97,159	103,508	101,505	93,375	95,599	95,006	96,033	98,294	102,253

Annual Percentage Distribution

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
General Merchandise	4.5	4.5	4.6	4.7	5.0	5.8	4.9	4.6	5.0	5.4
Food Stores	9.1	9.3	8.2	8.2	8.8	8.4	8.6	8.7	8.1	8.2
Apparel Stores	9.6	10.4	11.8	9.2	9.9	9.3	9.8	9.9	9.9	10.1
Eating & Drinking Places	42.2	41.7	41.4	41.8	44.1	43.3	43.6	43.9	44.9	45.2
Other Retail Stores	21.0	20.5	21.4	26.8	22.2	24.4	25.1	23.7	22.6	21.5
Personal & Repair Services	13.6	13.6	12.6	9.4	10.0	8.8	8.1	9.2	9.5	9.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
General Merchandise	3.6	9.8	N/A	-2.2	19.7	-15.9	-5.6	11.8	11.5
Food Stores	5.7	-6.6	N/A	-1.2	-1.9	1.2	3.1	-5.4	5.6
Apparel Stores	11.7	21.0	N/A	-1.5	-3.7	4.7	2.4	2.0	6.3
Eating & Drinking Places	1.8	5.8	N/A	-2.8	0.3	0.0	1.8	4.9	4.7
Other Retail Stores	0.4	11.5	N/A	-23.6	12.5	2.2	-4.5	-2.4	-1.0
Personal & Repair Services	3.5	-1.7	N/A	-1.9	-9.9	-8.8	14.6	5.8	5.1
TOTAL	3.1	6.5	N/A	-8.0	2.4	-0.6	1.1	2.4	4.0

FIGURE 3.2.2 RETAIL EMPLOYMENT BY INDUSTRY GROUP, 1998-2007**Notes:**

- Due to rounding, figures may not add to the total shown.
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.2.3 INDUSTRIAL EMPLOYMENT BY INDUSTRY GROUP, 1998-2007

This table presents job trends in the industrial land use category. Also included is the percentage distribution in any given year and the annual change within the industrial land use category. Figure 3.2.3 presents the job trends graphically.

Annual Average Number of Jobs

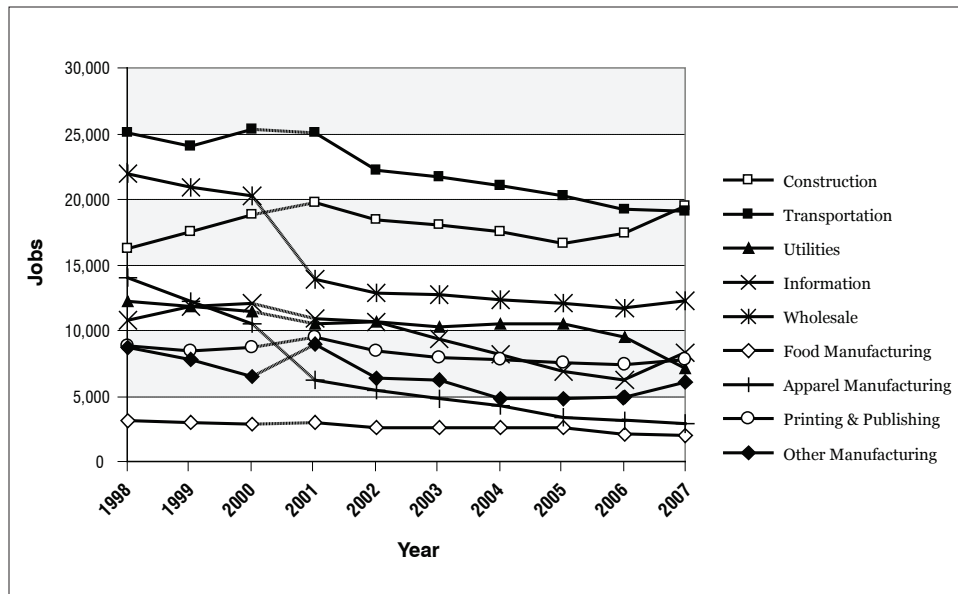
Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Construction	16,213	17,557	18,812	19,803	18,449	18,085	17,527	16,615	17,397	19,415
Transportation	25,053	24,081	25,313	25,118	22,170	21,653	21,099	20,222	19,204	19,071
Utilities	12,192	11,816	11,401	10,548	10,624	10,311	10,517	10,503	9,541	7,061
Information	10,782	11,861	12,101	10,897	10,603	9,415	8,226	6,930	6,189	8,350
Wholesale	22,006	20,855	20,263	13,872	12,792	12,754	12,306	12,087	11,729	12,274
Food Manufacturing	3,077	2,982	2,898	3,025	2,615	2,607	2,533	2,572	2,052	1,974
Apparel Manufacturing	14,056	12,197	10,574	6,220	5,396	4,779	4,256	3,387	3,172	2,864
Printing & Publishing	8,829	8,420	8,724	9,424	8,413	7,960	7,804	7,494	7,419	7,738
Other Manufacturing	8,753	7,819	6,452	8,931	6,411	6,171	4,747	4,815	4,921	6,050
TOTAL	120,961	117,588	116,540	107,837	97,473	93,735	89,014	84,623	81,625	84,796

Annual Percentage Distribution

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Construction	13.4	14.9	16.1	18.4	18.9	19.3	19.7	19.6	21.3	22.9
Transportation	20.7	20.5	21.7	23.3	22.7	23.1	23.7	23.9	23.5	22.5
Utilities	10.1	10.0	9.8	9.8	10.9	11.0	11.8	12.4	11.7	8.3
Information	8.9	10.1	10.4	10.1	10.9	10.0	9.2	8.2	7.6	9.8
Wholesale	18.2	17.7	17.4	12.9	13.1	13.6	13.8	14.3	14.4	14.5
Food Manufacturing	2.5	2.5	2.5	2.8	2.7	2.8	2.8	3.0	2.5	2.3
Apparel Manufacturing	11.6	10.4	9.1	5.8	5.5	5.1	4.8	4.0	3.9	3.4
Printing & Publishing	7.3	7.2	7.5	8.7	8.6	8.5	8.8	8.9	9.1	9.1
Other Manufacturing	7.2	6.6	5.5	8.3	6.6	6.6	5.3	5.7	6.0	7.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Construction	8.3	7.1	N/A	-6.8	-2.0	-3.1	-5.2	4.7	11.6
Transportation	-3.9	5.1	N/A	-11.7	-2.3	-2.6	-4.2	-5.0	-0.7
Utilities	-3.1	-3.5	N/A	0.7	-2.9	2.0	-0.1	-9.2	-26.0
Information	10.0	2.0	N/A	-2.7	-11.2	-12.6	-15.8	-10.7	34.9
Wholesale	-5.2	-2.8	N/A	-7.8	-0.3	-3.5	-1.7	-3.0	4.6
Food Manufacturing	-3.1	-2.8	N/A	-13.6	-0.3	-2.9	1.6	-20.2	-3.8
Apparel Manufacturing	-13.2	-13.3	N/A	-13.2	-11.4	-10.9	-20.4	-6.4	-9.7
Printing & Publishing	-4.6	3.6	N/A	-10.7	-5.4	-2.0	-4.0	-1.0	4.3
Other Manufacturing	-10.7	-17.5	N/A	-28.2	-3.7	-23.1	1.4	2.2	22.9
TOTAL	-2.8	-0.9	N/A	-9.6	-3.8	-5.0	-4.9	-3.5	3.9

FIGURE 3.2.3 INDUSTRIAL EMPLOYMENT BY INDUSTRY GROUP, 1998-2007**Notes:**

- Due to rounding, figures may not add to the total shown.
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Instruments, miscellaneous
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

**TABLE 3.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) EMPLOYMENT
BY INDUSTRY GROUP, 1998-2007**

This table presents job trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 3.2.4 presents the job trends graphically.

Annual Average Number of Jobs

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Art & Recreation	13,439	14,703	15,391	10,983	10,531	10,179	10,253	10,006	9,875	10,645
Health Care	35,874	36,193	33,011	33,766	34,190	34,336	35,720	36,222	36,910	37,530
Educational Services	38,279	40,988	41,779	41,697	42,587	44,145	45,529	46,507	48,539	50,732
Social Assistance	14,925	15,659	15,915	10,658	10,788	10,854	10,964	10,439	9,876	10,138
Other CIE Services	18,009	20,068	19,970	25,118	24,158	25,369	25,495	25,553	25,446	26,316
TOTAL	120,526	127,611	126,066	122,222	122,254	124,882	127,962	128,726	130,645	135,361

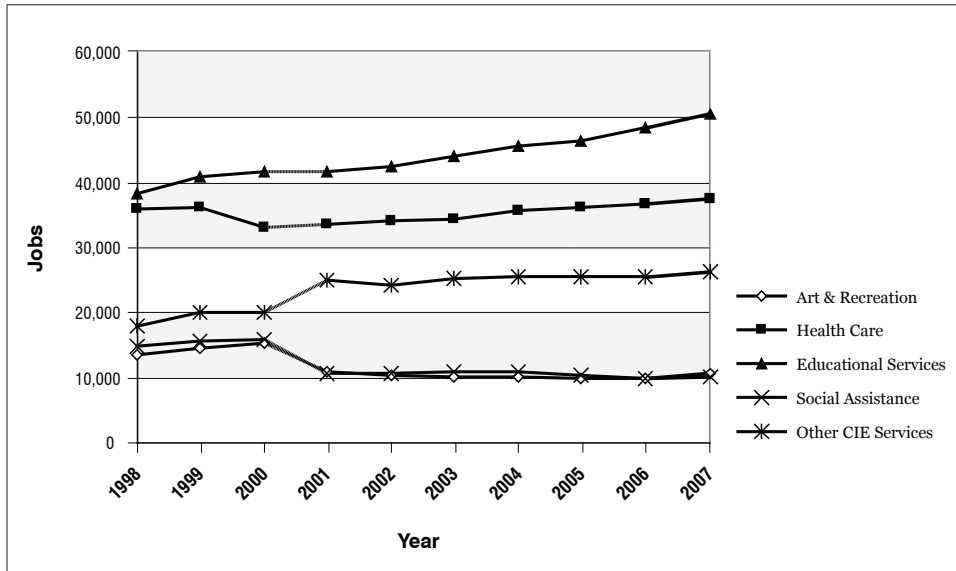
Annual Percentage Distribution

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Art & Recreation	11.2	11.5	12.2	9.0	8.6	8.2	8.0	7.8	7.6	7.9
Health Care	29.8	28.4	26.2	27.6	28.0	27.5	27.9	28.1	28.3	27.7
Educational Services	31.8	32.1	33.1	34.1	34.8	35.3	35.6	36.1	37.2	37.5
Social Assistance	12.4	12.3	12.6	8.7	8.8	8.7	8.6	8.1	7.6	7.5
Other CIE Services	14.9	15.7	15.8	20.6	19.8	20.3	19.9	19.9	19.5	19.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Art & Recreation	9.4	4.7	N/A	-4.1	-3.3	0.7	-2.4	-1.3	7.8
Health Care	0.9	-8.8	N/A	1.3	0.4	4.0	1.4	1.9	1.7
Educational Services	7.1	1.9	N/A	2.1	3.7	3.1	2.1	4.4	4.5
Social Assistance	4.9	1.6	N/A	1.2	0.6	1.0	-4.8	-5.4	2.6
Other CIE Services	11.4	-0.5	N/A	-3.8	5.0	0.5	0.2	-0.4	3.4
TOTAL	5.9	-1.2	N/A	0.0	2.1	2.5	0.6	1.5	3.6

FIGURE 3.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT
BY INDUSTRY GROUP, 1998-2007



Notes:

- Due to rounding, figures may not add to the total shown.
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Other CIE Services include:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private households
- Private households constitute the majority of other CIE services.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.3 EMPLOYMENT BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2006

This table presents the geographic distribution of jobs within San Francisco's eleven Commerce & Industry Districts, by land use category (see Chapter 1.2 – Data Formats for more on these districts)

Employment by Land Use Category and C&I District

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	Total
Bayview	1,858	2,435	14,163	-	968	11	19,435
Civic Center	12,639	9,695	1,162	4,926	14,539	11	42,972
Financial	119,144	18,386	21,116	6,780	12,378	82	177,885
Mission	2,524	5,075	3,920	23	4,211	30	15,783
North Beach	3,347	8,421	1,518	1,342	2,722	13	17,363
North Central	5,549	9,461	1,387	582	40,290	42	57,311
Northwest	3,397	5,464	2,782	122	8,928	27	20,719
South of Market	48,197	21,700	30,236	3,761	16,529	43	120,466
Southwest	8,382	13,751	4,850	98	17,003	65	44,149
Van Ness	3,847	5,574	1,654	1,208	5,392	11	17,686
Unclassified	5,778	2,111	2,196	-	11,901	3	21,989
TOTAL	214,661	102,073	84,984	18,841	134,862	338	555,758

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	Total
Bayview	0.9	2.4	16.7	0.0	0.7	3.4	3.5
Civic Center	5.9	9.5	1.4	26.1	10.8	3.2	7.7
Financial	55.5	18.0	24.8	36.0	9.2	24.1	32.0
Mission	1.2	5.0	4.6	0.1	3.1	9.0	2.8
North Beach	1.6	8.3	1.8	7.1	2.0	3.8	3.1
North Central	2.6	9.3	1.6	3.1	29.9	12.4	10.3
Northwest	1.6	5.4	3.3	0.6	6.6	8.0	3.7
South of Market	22.5	21.3	35.6	20.0	12.3	12.7	21.7
Southwest	3.9	13.5	5.7	0.5	12.6	19.1	7.9
Van Ness	1.8	5.5	1.9	6.4	4.0	3.4	3.2
Unclassified	2.7	2.1	2.6	0.0	8.8	1.0	4.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

CONTINUED >

Percentage Distribution by Land Use Category

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	Total
Bayview	9.6	12.5	72.9	0.0	5.0	0.1	100.0
Civic Center	29.4	22.6	2.7	11.5	33.8	0.0	100.0
Financial	67.0	10.3	11.9	3.8	7.0	0.0	100.0
Mission	16.0	32.2	24.8	0.1	26.7	0.2	100.0
North Beach	19.3	48.5	8.7	7.7	15.7	0.1	100.0
North Central	9.7	16.5	2.4	1.0	70.3	0.1	100.0
Northwest	16.4	26.4	13.4	0.6	43.1	0.1	100.0
South of Market	40.0	18.0	25.1	3.1	13.7	0.0	100.0
Southwest	19.0	31.1	11.0	0.2	38.5	0.1	100.0
Van Ness	21.8	31.5	9.4	6.8	30.5	0.1	100.0
Unclassified	26.3	9.6	10.0	0.0	54.1	0.0	100.0
TOTAL	38.6	18.4	15.3	3.4	24.3	0.1	100.0

Notes:

- Due to rounding, figures may not add to the total shown.
- CIE = Cultural/Institutional/Educational
- See Map 1.1 for San Francisco C & I district boundaries
- Sums may be less than in Table 3.1 due to increased data suppression warranted by the smaller geographic scale of analysis.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

4.0 ESTABLISHMENTS

This Chapter provides information about the number and distribution of establishments in San Francisco. This data is gathered from the California Employment Development Department (EDD). Prior to 2002, this data was collected from different sources (primarily the San Francisco Office of the Treasurer and Tax Collector) that utilized substantially different criteria and methodologies. Therefore, data is not presented for years prior to 2002.

This chapter reports establishment data by the locations of business, production, or operations. A single company or owner may conduct operations or services at multiple locations; each location is included. The data does not include San Francisco businesses that are exempt from paying local business tax. Government agencies and various non-profit organizations are exempt from local business tax. Businesses that fail to file taxes are not included.

Establishment data is reported both for the entire city and the city's ten Commerce and Industry Districts by five Land Use categories - Office, Retail, Industrial,

Hotel, and Cultural/Institutional/Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Chapter 1.2 - Data Formats.

Table 4.1 shows establishment data by Land Use Category from 2002 to 2007. Tables 4.2.1 through 4.2.4 show establishment data by Industry Group within each Land Use Category in San Francisco from 2002 to 2007. Tables 4.3 and 4.4 present San Francisco establishments in geographic context. Table 4.3 shows the distribution of establishments throughout the City data by Land Use Category type. Table 4.4 shows the distribution of establishments throughout the City data by employer size. Both tables show a sizable number of establishments for whom the geographical location is not known. These have been placed under an Unclassified category. This category represents home-based business establishments and organizations, particularly care-givers. These groups do not register a physical address with the State and thus are unable to be classified into a specific geographic district.

Establishments by Land Use Category

- *Table 4.1 San Francisco Establishments by Land Use Category, 2002-2007* — The number of establishments in San Francisco were at their highest level in six years. The number of establishments increased in 2007 for a second year in a row after two years of decline. Increases in CIE establishments more than offset establishment declines in all of the other land use categories.
- *Table 4.2.1 Office Establishments by Industry Groups, 2002-2007* — Within Office establishments, the number of Insurance and Public Administration firms increased while all other Office industry groups showed a decrease in numbers. Overall, the number of Office establishments was lower by almost 1%.
- *Table 4.2.2 Retail Establishments by Industry Groups, 2002-2007* — Retail establishments decreased in 2007 with all industry groups except Food Stores and Eating and Drinking Places reporting lower numbers.
- *Table 4.2.3 Industrial Establishments by Industry Groups, 2002-2007* — Overall, Industrial establishments decreased slightly in 2007. Losses were greatest for the Apparel Manufacturing and Other Manufacturing industry groups. Information establishments increased by over 33%.
- *Table 4.2.4 Cultural/Institutional/Educational Establishments by Industry Group, 2002-2007* — Overall CIE establishments continued to increase. Within CIE establishments, the source of the continued growth in both quantity and share comes from Other CIE Services, which largely consists of private household establishments. The only other industry group showing a increase in establishments in 2007 was Social Assistance. Establishments in the remaining industry groups were down slightly.

Establishments by Geographic District

- *Table 4.3 Establishments by Commerce and Industry District and Land Use Category, 2007* — Over a third of all establishments and almost 71% of CIE establishments are in the Unclassified district, representing jobs that are home based and are geographically spread citywide. Geographic areas showing the largest number of establishments in 2007 were the Financial and South of Market districts. More than 40% of San Francisco's Office establishments are located in the Financial district.

Establishments by Size

- *Table 4.4 Establishments by Commerce and Industry District and Establishment Size, 2007* — The vast majority of businesses have four or fewer employees. Geographically, the largest number of establishments – over a third of all establishments – is in the Unclassified district, representing jobs that are home based and are spread citywide. As with most establishments, these geographically Unclassified firms employ less than four employees. Larger firms, with 250 employees or more are concentrated in the Financial and South of Market districts.

TABLE 4.1 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2007

This table contains the number of establishments in each of the five major non-residential land use categories in San Francisco. Data is presented from 2002-2007. Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 4.1.1 (a snapshot of establishment distribution in 2007) and 4.1.2 (a look at six-year trends).

Number of Establishments

Land Use Category	2002	2003	2004	2005	2006	2007
Office	11,873	11,314	10,983	10,778	11,280	11,179
Retail	7,805	7,761	7,651	7,450	7,517	7,395
Industrial	5,341	5,122	4,984	4,826	4,847	4,839
Hotel	324	339	329	320	311	291
CIE	17,484	18,671	19,189	19,418	20,172	20,466
TOTAL	42,992	43,272	43,201	42,855	44,190	44,414

Annual Percentage Distribution

Land Use Category	2002	2003	2004	2005	2006	2007
Office	27.6	26.1	25.4	25.1	25.5	25.2
Retail	18.2	17.9	17.7	17.4	17.0	16.7
Industrial	12.4	11.8	11.5	11.3	11.0	10.9
Hotel	0.8	0.8	0.8	0.7	0.7	0.7
CIE	40.7	43.1	44.4	45.3	45.6	46.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2002-03	2003-04	2004-05	2005-06	2006-07
Office	-4.7	-2.9	-1.9	4.7	-0.9
Retail	-0.6	-1.4	-2.6	0.9	-1.6
Industrial	-4.1	-2.7	-3.2	0.4	-0.2
Hotel	4.6	-2.9	-2.7	-2.8	-6.4
CIE	6.8	2.8	1.2	3.9	1.5
TOTAL	0.7	-0.2	-0.8	3.1	0.5

Notes:

- CIE = Cultural/Institutional/Educational
- Totals also include some unclassified land uses

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

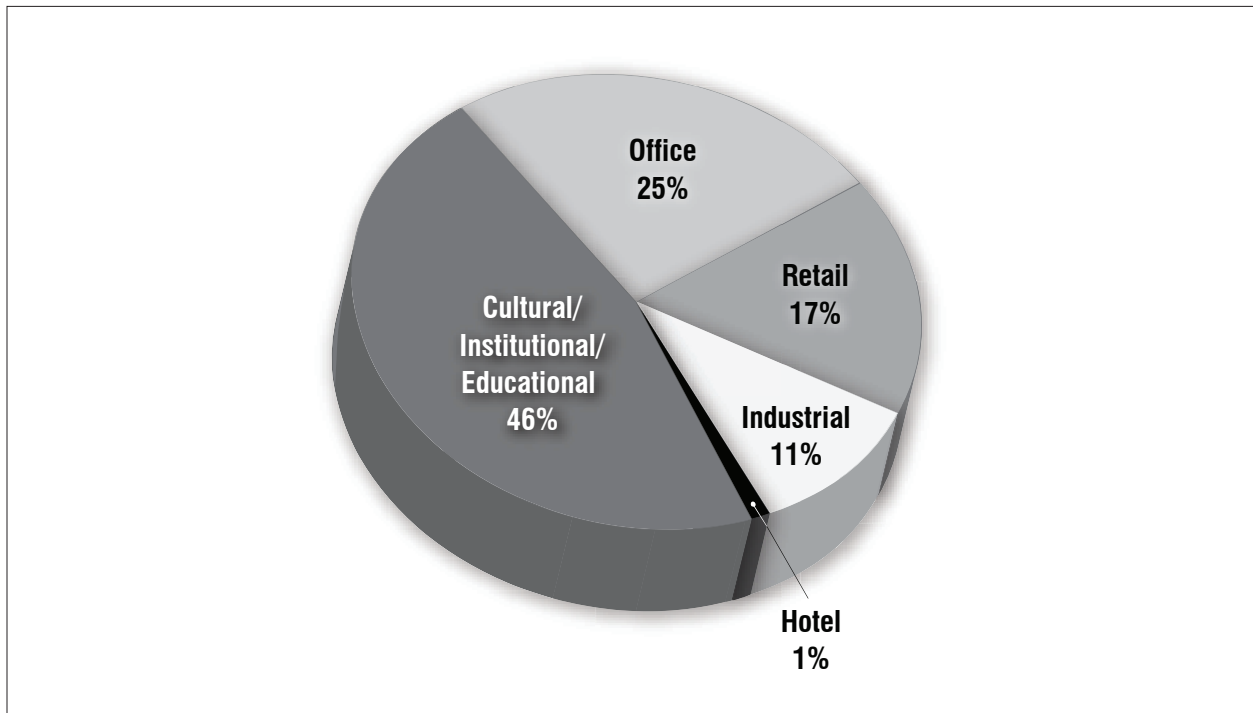
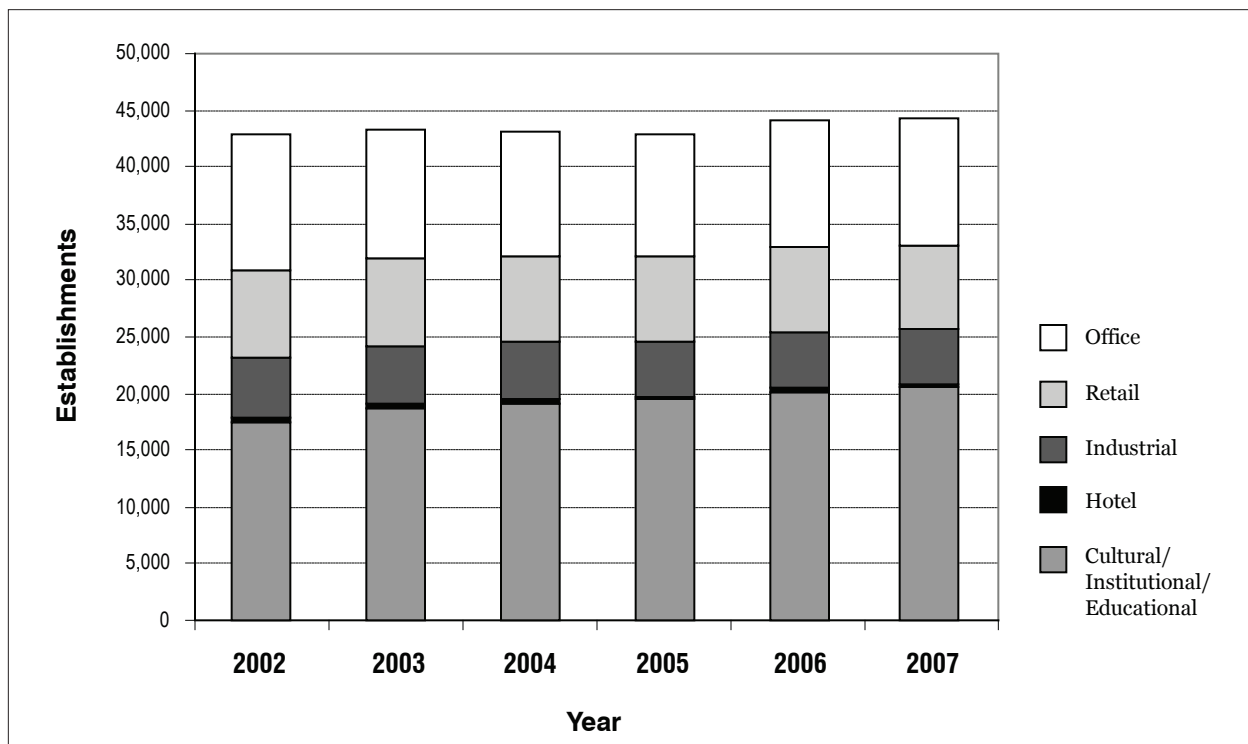
FIGURE 4.1.1 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2007**FIGURE 4.1.2** SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2007

TABLE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2007

This table presents establishment trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 4.2.1 presents the establishment trends graphically.

Number of Establishments

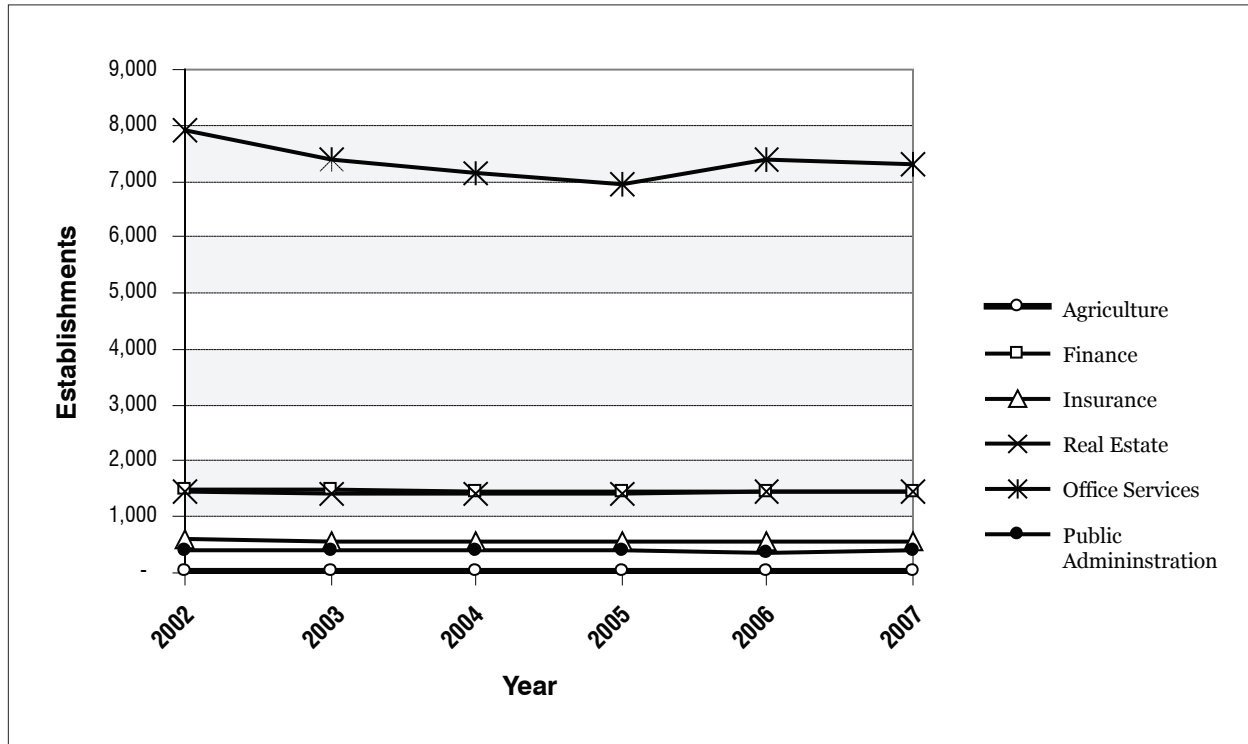
Industry Group	2002	2003	2004	2005	2006	2007
Agriculture	29	42	41	38	37	36
Finance	1,494	1,485	1,455	1,438	1,464	1,455
Insurance	586	579	558	547	552	559
Real Estate	1,447	1,426	1,404	1,418	1,472	1,443
Office Services	7,913	7,384	7,132	6,937	7,371	7,297
Public Administration	396	393	394	401	380	384
TOTAL	11,865	11,307	10,983	10,778	11,275	11,173

Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007
Agriculture	0.2	0.4	0.4	0.4	0.3	0.3
Finance	12.6	13.1	13.2	13.3	13.0	13.0
Insurance	4.9	5.1	5.1	5.1	4.9	5.0
Real Estate	12.2	12.6	12.8	13.2	13.1	12.9
Office Services	66.7	65.3	64.9	64.4	65.4	65.3
Public Administration	3.3	3.5	3.6	3.7	3.4	3.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2004-05	2005-06
Agriculture	44.8	-2.4	-7.9	-2.6	-1.4
Finance	-0.6	-2.0	-1.2	1.8	-0.6
Insurance	-1.2	-3.6	-1.9	0.9	1.2
Real Estate	-1.5	-1.5	1.0	3.8	-2.0
Office Services	-6.7	-3.4	-2.7	6.3	-1.0
Public Administration	-0.9	0.3	1.8	-5.2	1.2
TOTAL	-4.7	-2.9	-1.9	4.6	-0.9

FIGURE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2007**Notes:**

- Due to rounding, figures may not add to the total shown.
- Office Service consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services
- Annual average includes last quarter of previous year, and first three quarters of current year.
- Sum is less than in Table 4.1 due to increased data suppression warranted by the smaller industrial scale of analysis.

Sources:

- California Employment Development Department
- Data not publicly available

TABLE 4.2.2 RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2007

This table presents establishment trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 4.2.2 presents the establishment trends graphically.

Number of Establishments

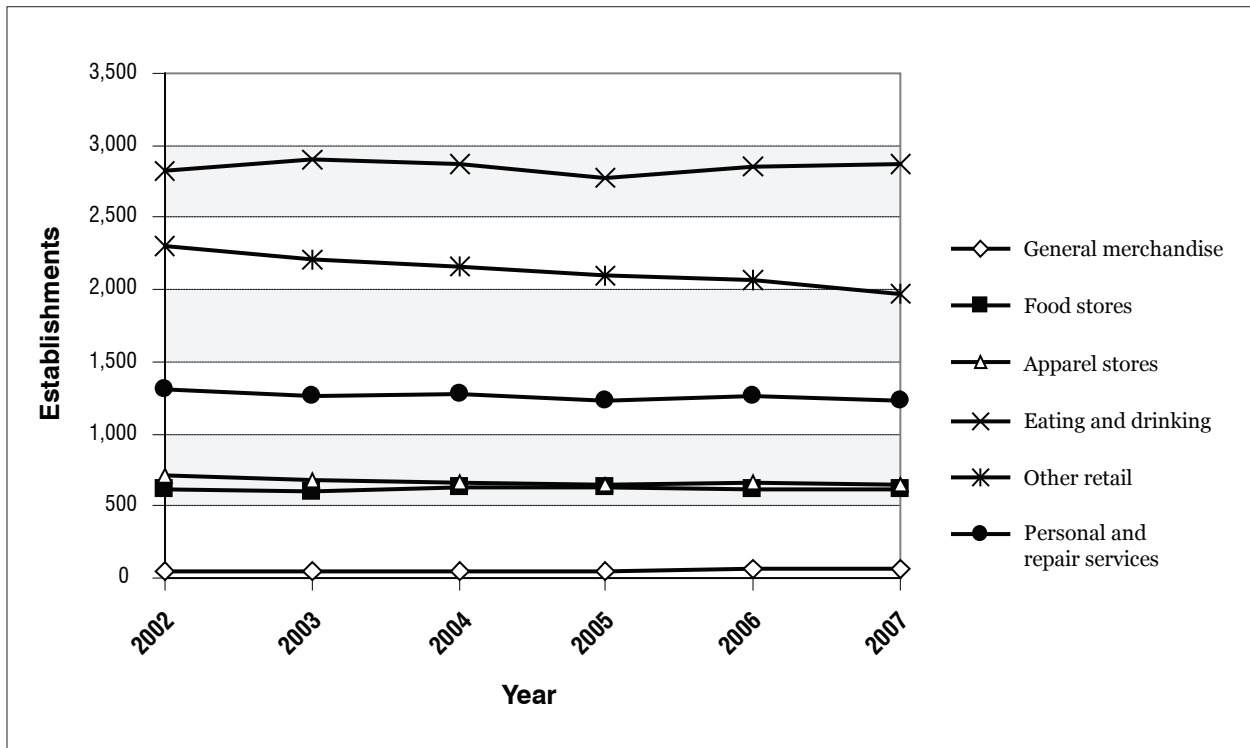
Industry Group	2002	2003	2004	2005	2006	2007
General Merchandise	53	55	54	55	69	68
Food Stores	615	607	626	629	608	612
Apparel Stores	712	680	662	654	661	647
Eating & Drinking Places	2,827	2,900	2,866	2,780	2,858	2,867
Other Retail Services	2,296	2,204	2,163	2,097	2,068	1,965
Personal & Repair Services	1,301	1,256	1,280	1,235	1,255	1,237
TOTAL	7,805	7,701	7,651	7,450	7,517	7,395

Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007
General Merchandise	0.7	0.7	0.7	0.7	0.9	0.9
Food Stores	7.9	7.9	8.2	8.4	8.1	8.3
Apparel Stores	9.1	8.8	8.7	8.8	8.8	8.7
Eating & Drinking Places	36.2	37.7	37.5	37.3	38.0	38.8
Other Retail Services	29.4	28.6	28.3	28.2	27.5	26.6
Personal & Repair Services	16.7	16.3	16.7	16.6	16.7	16.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06	2006-07
General Merchandise	3.3	-1.8	1.9	25.1	-1.1
Food Stores	-1.4	3.1	0.6	-3.4	0.6
Apparel Stores	-4.6	-2.5	-1.2	1.0	-2.2
Eating & Drinking Places	2.6	-1.2	-3.0	2.8	0.3
Other Retail Services	-4.0	-1.9	-3.0	-1.4	-4.9
Personal & Repair Services	-3.5	1.9	-3.5	1.6	-1.4
TOTAL	-1.3	-0.6	-2.6	0.9	-1.6

FIGURE 4.2.2 RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2007**Notes:**

- Due to rounding, figures may not add to the total shown.
- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available

TABLE 4.2.3 INDUSTRIAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2007

This table presents establishment trends in the industrial land use category. Also included is the percentage distribution in any given year and the annual change within the industrial land use category. Figure 4.2.3 presents the establishment trends graphically.

Number of Establishments

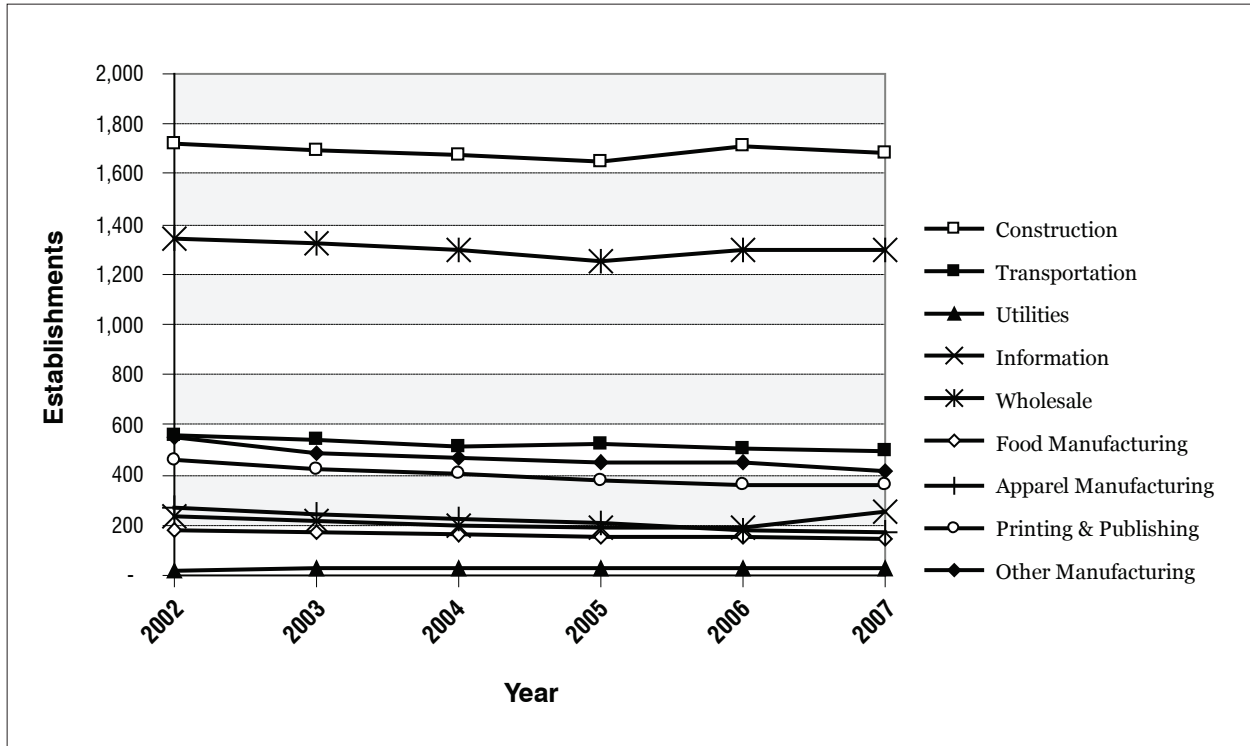
Industry Group	2002	2003	2004	2005	2006	2007
Construction	1,722	1,697	1,678	1,647	1,708	1,687
Transportation	562	544	517	527	502	494
Utilities	22	23	26	26	25	26
Information	235	213	202	185	187	249
Wholesale	1,341	1,322	1,296	1,255	1,293	1,295
Food Manufacturing	179	168	160	155	152	147
Apparel Manufacturing	272	242	226	206	179	168
Printing & Publishing	463	424	406	376	358	358
Other Manufacturing	546	490	468	450	446	416
TOTAL	5,342	5,122	4,978	4,826	4,849	4,839

Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007
Construction	32.2	33.1	33.7	34.1	35.2	34.9
Transportation	10.5	10.6	10.4	10.9	10.3	10.2
Utilities	0.4	0.4	0.5	0.5	0.5	0.5
Information	4.4	4.2	4.0	3.8	3.9	5.1
Wholesale	25.1	25.8	26.0	26.0	26.7	26.8
Food Manufacturing	3.4	3.3	3.2	3.2	3.1	3.0
Apparel Manufacturing	5.1	4.7	4.5	4.3	3.7	3.5
Printing & Publishing	8.7	8.3	8.2	7.8	7.4	7.4
Other Manufacturing	10.2	9.6	9.4	9.3	9.2	8.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06	2006-07
Construction	-1.4	-1.1	-1.8	3.7	-1.2
Transportation	-3.2	-5.1	2.0	-4.8	-1.5
Utilities	5.0	14.3	1.0	-4.8	3.0
Information	-9.4	-5.4	-8.2	1.1	33.2
Wholesale	-1.4	-1.9	-3.2	3.1	0.2
Food Manufacturing	-6.1	-4.6	-3.1	-2.1	-3.1
Apparel Manufacturing	-11.2	-6.3	-9.2	-12.9	-6.3
Printing & Publishing	-8.4	-4.2	-7.5	-4.7	0.1
Other Manufacturing	-10.3	-4.5	-3.7	-0.9	-6.8
TOTAL	-4.1	-2.8	-3.1	0.5	-0.2

FIGURE 4.2.3 INDUSTRIAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2007**Notes:**

- Due to rounding, figures may not add to the total shown.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Instruments, miscellaneous
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

**TABLE 4.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) ESTABLISHMENTS
BY INDUSTRY GROUP, 2002-2007**

This table presents establishment trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 4.2.4 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006	2007
Art & Recreation	425	412	405	402	424	424
Health Care	2,059	2,070	2,066	2,025	2,086	2,075
Educational Services	962	972	910	699	699	694
Social Assistance	546	592	595	586	574	590
Other CIE Services	13,491	14,625	15,209	15,706	16,389	16,684
TOTAL	17,483	18,671	19,185	19,418	20,172	20,466

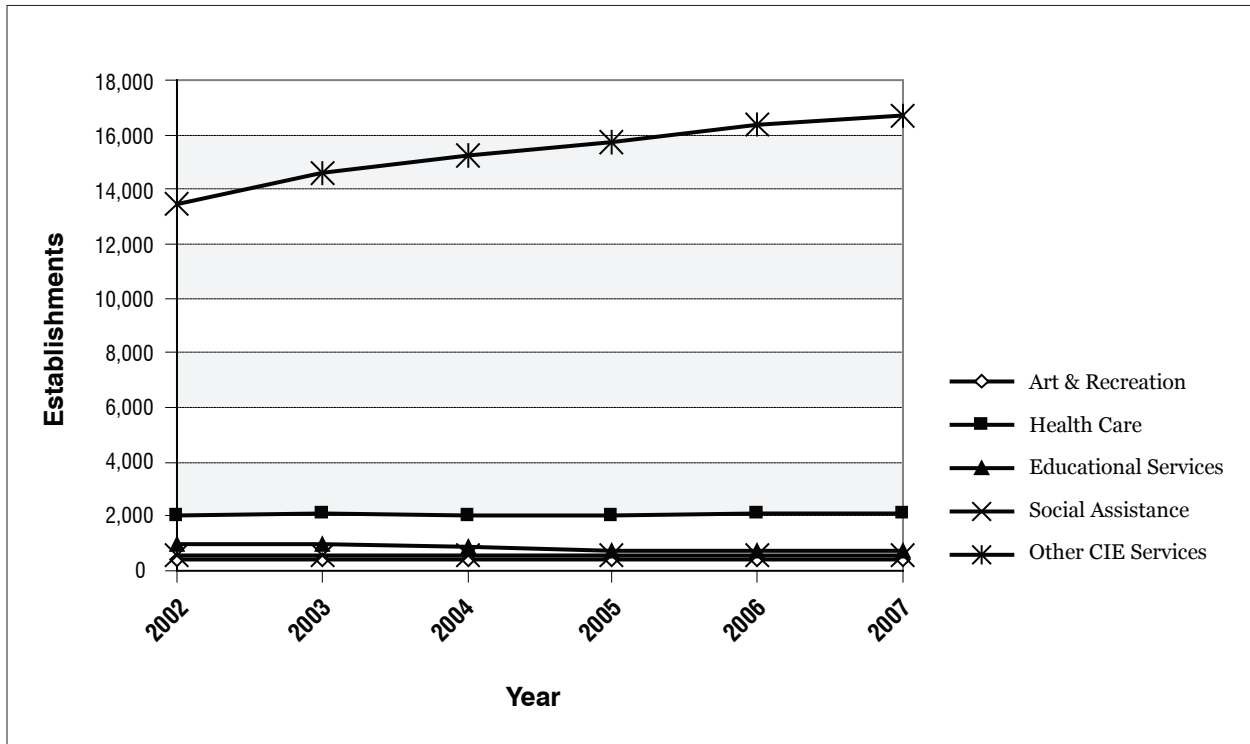
Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007
Art & Recreation	2.4	2.2	2.1	2.1	2.1	2.1
Health Care	11.8	11.1	10.8	10.4	10.3	10.1
Educational Services	5.5	5.2	4.7	3.6	3.5	3.4
Social Assistance	3.1	3.2	3.1	3.0	2.8	2.9
Other CIE Services	77.2	78.3	79.3	80.9	81.2	81.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06	2006-07
Art & Recreation	-3.1	-1.7	-0.7	5.5	-0.1
Health Care	0.5	-0.2	-2.0	3.0	-0.6
Educational Services	1.1	-6.4	-23.2	0.0	-0.7
Social Assistance	8.5	0.4	-1.4	-2.1	2.8
Other CIE Services	8.4	4.0	3.3	4.4	1.8
TOTAL	6.8	2.8	1.2	3.9	1.5

FIGURE 4.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2007



Notes:

- Due to rounding, figures may not add to the total shown.
- Other CIE Services includes:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private households
- Private households constitute the majority of Other CIE services.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.3 ESTABLISHMENTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2007

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts by land use category (see Chapter 1.2 – Data Formats for more on these Districts).

Number of Establishments

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	TOTAL
Bayview	153	243	677	2	90	8	1,173
Civic Center	626	458	117	56	336	8	1,601
Financial	4,524	1,233	734	48	993	54	7,587
Mission	373	485	286	5	314	17	1,479
North Beach	374	521	145	25	187	10	1,261
North Central	826	884	265	44	992	30	3,041
Northwest	541	555	287	7	714	21	2,125
South of Market	1,555	1,076	1,141	37	459	32	4,299
Southwest	1,340	1,332	906	21	1,461	51	5,110
Van Ness	542	478	118	42	418	12	1,608
Unclassified	328	132	163	4	14,502	3	15,131
TOTAL	11,179	7,395	4,839	291	20,466	244	44,414

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	TOTAL
Bayview	1.4	3.3	14.0	0.7	0.4	3.1	2.6
Civic Center	5.6	6.2	2.4	19.3	1.6	3.1	3.6
Financial	40.5	16.7	15.2	16.6	4.9	22.3	17.1
Mission	3.3	6.6	5.9	1.7	1.5	6.8	3.3
North Beach	3.3	7.0	3.0	8.4	0.9	3.9	2.8
North Central	7.4	12.0	5.5	15.2	4.8	12.4	6.8
Northwest	4.8	7.5	5.9	2.4	3.5	8.7	4.8
South of Market	13.9	14.5	23.6	12.7	2.2	12.9	9.7
Southwest	12.0	18.0	18.7	7.3	7.1	20.9	11.5
Van Ness	4.8	6.5	2.4	14.2	2.0	4.7	3.6
Unclassified	2.9	1.8	3.4	1.5	70.9	1.1	34.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	TOTAL
Bayview	13.0	20.7	57.7	0.2	7.7	0.6	100.0
Civic Center	39.1	28.6	7.3	3.5	21.0	0.5	100.0
Financial	59.6	16.2	9.7	0.6	13.1	0.7	100.0
Mission	25.2	32.8	19.3	0.3	21.2	1.1	100.0
North Beach	29.6	41.3	11.5	1.9	14.8	0.8	100.0
North Central	27.1	29.1	8.7	1.5	32.6	1.0	100.0
Northwest	25.4	26.1	13.5	0.3	33.6	1.0	100.0
South of Market	36.2	25.0	26.5	0.9	10.7	0.7	100.0
Southwest	26.2	26.1	17.7	0.4	28.6	1.0	100.0
Van Ness	33.7	29.7	7.3	2.6	26.0	0.7	100.0
Unclassified	2.2	0.9	1.1	0.0	95.8	0.0	100.0
TOTAL	25.2	16.6	10.9	0.7	46.1	0.5	100.0

Notes:

- Due to rounding, figures may not add to the total shown.
- CIE = Cultural/Institutional/Educational
- Tables 4.2.1-4.2.4 provide detailed information of various components of Office, Retail, Industrial and CIE respectively.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.4 ESTABLISHMENTS BY COMMERCE & INDUSTRY DISTRICT AND SIZE CLASS, 2007

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts, by the size of the establishment (see Chapter 1.2 – Data Formats for more on these Districts).

Number of Employees

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	493	259	211	141	42	24	2	-	1	1,173
Civic Center	767	283	227	196	68	38	14	5	4	1,601
Financial	3,680	1,366	1,009	847	344	220	78	35	9	7,587
Mission	841	308	158	119	37	14	3	1	-	1,479
North Beach	673	235	162	118	49	19	4	1	-	1,261
North Central	1,935	472	330	203	63	28	4	2	7	3,041
Northwest	1,386	347	221	122	27	14	6	1	2	2,125
South of Market	1,971	843	621	511	195	96	35	13	15	4,299
Southwest	3,293	891	486	300	89	40	9	2	1	5,110
Van Ness	978	276	161	124	41	22	5	-	1	1,608
Unclassified	14,809	132	86	56	29	12	3	4	-	15,131
TOTAL	30,826	5,411	3,671	2,736	981	526	162	63	39	44,413

Percentage Distribution by C&I District

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	1.6	4.8	5.7	5.2	4.2	4.6	1.2	0.0	2.6	2.6
Civic Center	2.5	5.2	6.2	7.1	6.9	7.1	8.5	7.1	11.0	3.6
Financial	11.9	25.2	27.5	31.0	35.0	41.8	48.0	55.2	22.6	17.1
Mission	2.7	5.7	4.3	4.3	3.7	2.6	1.9	1.6	0.0	3.3
North Beach	2.2	4.3	4.4	4.3	5.0	3.7	2.6	1.2	0.0	2.8
North Central	6.3	8.7	9.0	7.4	6.4	5.3	2.3	2.4	16.8	6.8
Northwest	4.5	6.4	6.0	4.5	2.7	2.6	3.9	1.6	5.2	4.8
South of Market	6.4	15.6	16.9	18.7	19.9	18.3	21.4	21.0	37.4	9.7
Southwest	10.7	16.5	13.2	11.0	9.0	7.6	5.4	3.2	2.6	11.5
Van Ness	3.2	5.1	4.4	4.5	4.2	4.2	2.8	0.0	1.9	3.6
Unclassified	48.0	2.4	2.3	2.0	2.9	2.2	2.0	6.7	0.0	34.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Size Class

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	42.0	22.1	18.0	12.0	3.5	2.1	0.2	0.0	0.1	100.0
Civic Center	47.9	17.7	14.2	12.2	4.2	2.3	0.9	0.3	0.3	100.0
Financial	48.5	18.0	13.3	11.2	4.5	2.9	1.0	0.5	0.1	100.0
Mission	56.9	20.8	10.6	8.0	2.5	0.9	0.2	0.1	0.0	100.0
North Beach	53.4	18.6	12.8	9.4	3.9	1.5	0.3	0.1	0.0	100.0
North Central	63.6	15.5	10.8	6.7	2.1	0.9	0.1	0.0	0.2	100.0
Northwest	65.2	16.3	10.4	5.7	1.2	0.6	0.3	0.0	0.1	100.0
South of Market	45.9	19.6	14.4	11.9	4.5	2.2	0.8	0.3	0.3	100.0
Southwest	64.4	17.4	9.5	5.9	1.7	0.8	0.2	0.0	0.0	100.0
Van Ness	60.8	17.2	10.0	7.7	2.6	1.4	0.3	0.0	0.0	100.0
Unclassified	97.9	0.9	0.6	0.4	0.2	0.1	0.0	0.0	0.0	100.0
TOTAL	69.4	12.2	8.3	6.2	2.2	1.2	0.4	0.1	0.1	100.0

Note:

- Due to rounding, figures may not add to the total shown.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

5.0 MONETARY TRANSACTIONS

This chapter presents information about trends in monetary transactions that occur in San Francisco. While the 'Employment' and 'Establishments' chapters provide information regarding the quantity and growth of jobs and establishments in San Francisco, this chapter supplies complementary information regarding the city's economic prosperity in monetary terms. The chapter is divided into three sections, each relating to a key source of revenue in the city's economy such as retail sales and permits, annual wages, and government revenues.

Section 5.1 describes total annual wages received by individuals for work in San Francisco from 1998 to 2007, using data supplied by the California Employment Development Department (EDD). Section 5.2 presents the State Board of Equalization's data on San Francisco's taxable retail sales and sales tax permits in 2007. Section 5.3 reports city government revenues and expenditures in fiscal year 2007 (07/01/2006 – 06/30/2007). This data is obtained from

the City Controller's office. The tables in each section report each indicator's quantity in specific units and annual percentage distribution.

Previous inventories from 1987-2000 also reported businesses' gross receipts by Commerce & Industry District. Since 2001, this data is no longer reported; as of May 25, 2001, the San Francisco Board of Supervisors repealed the gross receipts business tax.

Nominal or current dollars reported for a specified period of time have been adjusted for inflation to obtain constant dollars. The adjustments have been made to control for inflated monetary values, thus enabling better measurement of an indicator's economic performance over time. The adjustments have been made by dividing nominal or current values by the Consumer Price Index (CPI) provided by the United States Department of Labor, Bureau of Labor Statistics.

5.1 WAGES BY LAND USE CATEGORY

This section describes total annual earnings received by persons for work in San Francisco from 1998 to 2007. Persons who received wages include workers who commute into the city and San Francisco residents employed in the city. The California Employment Development Department (EDD) prepares the measure of total annual wages. It includes each employee's total wages as reported by businesses in their payroll records. The earnings of sole proprietors are not reported in these data. Total annual wages are presented in thousands of dollars, annual percentage distribution, and percentage change.

This section complements Chapter 3, Employment. The employment and wages data in this inventory are derived from the same source, and are organized by Land Use Category. For an explanation of the Land Use Categories and C&I Districts, refer to Section 1.2 - Data Formats.

Since 2001, Land Use categories are organized according to North American Industry Classification system (NAICS). From 1998 through 2000, these were organized according to Standard Industrial Classification System (SIC). Both industry classification systems are discussed in Chapter 1 – Data Formats. Table 1.2 in Chapter 1 shows the closest match between SIC and NAICS land use categories. It is not possible to get a 100% match, because under the NAICS, certain industries have been moved from one Land Use Category to another.

- *Table 5.1.1 Total Annual Wages by Land Use Activity, 1998–2007* — Total annual wages continued to rise in 2007, reaching their highest level since 2001. This increase in annual wages was highest in Office (7.5%), Industrial (6.7%), and Retail (5.6%), though wages in all land use categories showed gains.
- *Table 5.1.2 Annual Wages per Worker by Land Use Activity, 1998–2007* — All sectors, except for CIE workers, saw their wages rise, on average, 2.6%. Office workers by far earned the most, averaging \$115,120 annually in 2007, while Retail workers earned the least at an average of \$31,396.

5.2 TAXABLE SALES AND PERMITS

Section 5.2 reports taxable sales in retail stores and the number of sales tax permits issued for retail stores located in San Francisco from 1999 to 2007. Taxable sales and permits in California are reported by the California State Board of Equalization (SBE). Taxable sales revenues and sales tax permits issued for outlets that are not retail stores, including business and personal services, have not been included. Such outlets include the following: non-store retailers (vending machines, sales by telephone), public utilities, government agencies, educational institutions, health services, and advertising agencies.

Taxable sales are measured by transactions subject to sales and use tax, and are reported by type of business for all cities and counties in California on a quarterly basis. Businesses are classified by the SBE according to their principal line of merchandise or service. Taxable sales are reported by type of business, but cannot be broken down by commodity. Those data do not include sales that are not subject to sales or use tax, such as food for home consumption, prescription medicine, sales for resale, and taxable sales disclosed by board audits.

The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property, except those dealing in non-taxable commodities. Permits are tabulated semi-annually on January 1 and July 1.

- *Table 5.2.1 Taxable Retail Sales and All Outlet Sales, 1999–2007* — Taxable sales at Retail Stores almost 5% in 2007 after three years of increases. However, sales at All Outlets continued to increase – a trend which started in 2003. Still, sales activities have yet to recapture levels recorded in 2000.
- *Table 5.2.2 Taxable Retail Sales & Sales Tax Permits by Type of Outlet, 2007* — The Other Retail Stores category accounts for 44% of the Retail Stores sales tax permits and 24% of retail taxable sales. Eating and Drinking establishments make up 26% of Retail Stores sales tax permits and retail taxable sales. Service Stations have the highest

sales per establishment at just over \$4.5 million followed by General Merchandise stores which average \$3.3 million.

5.3 CITY REVENUES AND EXPENDITURES

Section 5.3 presents San Francisco city government revenues and expenditures for fiscal year 2006-2007. The fiscal year ends on June 30th. The data in this subsection is from the Comprehensive Annual Financial Report, prepared by the San Francisco Controller's Office. This data concerns the general fund, special revenue funds, and debt service funds. Table 5.3.1 describes general governmental revenues by source. Table 5.3.2 describes general governmental expenditures by major function.

The general fund accounts for resources that are not required to be accounted for in other funds. Special revenue funds are used to account for the proceeds of a specific revenue source, other than expendable trusts or major capital projects, which are legally restricted to expenditures for specified purposes. Now included in the general fund are two major funds/activities that were previously accounted for in special revenue funds: hotel tax and work order funds. All other previous special revenue funds remain in the new fund structure as special revenue funds. The debt service funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal on general obligation and lease revenue bonds and related authorized costs. There are no changes in the fund structure of this fund type.

Other city funds not included are capital project funds, proprietary fund types, and fiduciary fund types. Proprietary funds consist of enterprise and internal service funds. Fiduciary funds consist of pension trust, non-expendable trust funds, and expendable trust funds.

Table 5.3.1 general governmental revenues are presented by major source while Table 5.3.2 presents them by government function for fiscal year 2006-07. Major revenue sources are property taxes; business taxes; other local taxes; licenses, fines and penalties; interest and investment income; rents and concessions; intergovernmental; and charges for services. The major functions of general governmental expenditures include public protection; public works, transportation, and commerce; human welfare and neighborhood development; community health; culture and recreation; general administration and finance; debt service; and capital outlay.

- *Table 5.3.1 San Francisco Government General Revenue by Source, Fiscal Year 2007* — Property Taxes and Intergovernmental transfers were the primary sources of revenue for San Francisco, accounting for 31% and 27% respectively. Other significant sources of San Francisco government revenues were Other Local Taxes (19%) and Business Taxes (9%).
- *Table 5.3.2 San Francisco Government General Expenditures by Function, Fiscal Year 2007* — Public Protection, Human Welfare / Neighborhood Development, and Community Health functions were the largest recipients of San Francisco government expenditures in Fiscal Year 2007 accounting for 26%, 22%, and 15% respectively.

TABLE 5.1.1 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1998-2007

This table contains the amount of wages paid to workers in each of the five major non-residential land use categories in San Francisco. Data is presented from 1998-2007, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1998-2000 data and 2001-2007 data (see Chapter 1.2 - Data Formats for a description of land use categories and an SIC-NAICS discussion). Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 5.1.1 (a snapshot of job distribution in 2007) and 5.1.2 (a look at ten-year trends).

Nominal - Non-Adjusted for Inflation (\$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	\$14,468,000	\$17,567,000	\$20,739,473	\$21,199,248	\$18,033,855	\$17,219,114	\$17,619,077	\$19,229,061	\$22,250,471	\$24,711,750
Retail	\$2,169,000	\$2,581,000	\$3,114,529	\$2,799,088	\$2,658,388	\$2,650,198	\$2,664,799	\$2,841,746	\$2,942,479	\$3,210,333
Industrial	\$6,012,000	\$6,436,000	\$6,420,260	\$6,225,883	\$5,646,816	\$5,536,894	\$5,550,080	\$5,550,920	\$5,753,421	\$6,340,182
Hotel	\$514,000	\$536,000	\$557,887	\$500,105	\$500,105	\$538,418	\$584,876	\$613,242	\$671,000	\$704,872
CIE	\$4,145,000	\$4,248,000	\$4,310,301	\$5,094,812	\$5,177,070	\$5,403,197	\$5,558,781	\$5,911,782	\$6,380,066	\$6,817,418
TOTAL	\$27,309,550	\$31,369,029	\$35,143,450	\$35,880,136	\$32,019,082	\$31,347,821	\$31,977,613	\$34,149,206	\$37,998,504	\$41,805,696

Inflation-Adjusted (2007 \$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	\$18,886,903	\$22,001,827	\$24,865,270	\$24,118,247	\$20,187,452	\$18,941,726	\$19,147,718	\$20,495,314	\$22,978,823	\$24,711,750
Retail	\$2,831,469	\$3,232,579	\$3,734,117	\$3,184,504	\$2,975,852	\$2,915,326	\$2,895,998	\$3,028,873	\$3,038,799	\$3,210,333
Industrial	\$7,848,221	\$8,060,782	\$7,697,471	\$7,083,146	\$6,320,037	\$6,090,809	\$6,031,609	\$5,916,454	\$5,941,755	\$6,340,182
Hotel	\$670,989	\$671,314	\$668,870	\$613,979	\$559,827	\$592,281	\$635,620	\$653,625	\$692,965	\$704,872
CIE	\$5,410,991	\$5,320,417	\$5,167,768	\$5,796,335	\$5,795,314	\$5,943,736	\$6,041,064	\$6,301,079	\$6,588,913	\$6,817,418
TOTAL	\$35,650,596	\$39,288,208	\$42,134,695	\$40,820,598	\$35,842,791	\$34,483,880	\$34,752,009	\$36,397,966	\$39,242,356	\$41,805,696

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	53.0	56.0	59.0	59.1	56.3	54.9	55.1	56.3	58.6	59.1
Retail	7.9	8.2	8.9	7.8	8.3	8.5	8.3	8.3	7.7	7.7
Industrial	22.0	20.5	18.3	17.4	17.6	17.7	17.4	16.3	15.1	15.2
Hotel	1.9	1.7	1.6	1.5	1.6	1.7	1.8	1.8	1.8	1.7
CIE	15.2	13.5	12.3	14.2	16.2	17.2	17.4	17.3	16.8	16.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2001- 02	2003-04	2004-05	2005-06	2006-07
Office	16.5	13.0	N/A	-16.3	-6.2	1.1	7.0	12.1	7.5
Retail	14.2	15.5	N/A	-6.6	-2.0	-0.7	4.6	0.3	5.6
Industrial	2.7	-4.5	N/A	-10.8	-3.6	-1.0	-1.9	0.4	6.7
Hotel	0.0	-0.4	N/A	-8.8	5.8	7.3	2.8	6.0	1.7
CIE	-1.7	-2.9	N/A	-0.0	2.6	1.6	4.3	4.6	3.5
TOTAL	10.2	7.2	N/A	-12.2	-3.8	0.8	4.7	7.8	6.5

Notes:

- Due to rounding, figures may not add to the total shown.
- CIE = Cultural/Institutional/Educational
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

FIGURE 5.1.1 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2007

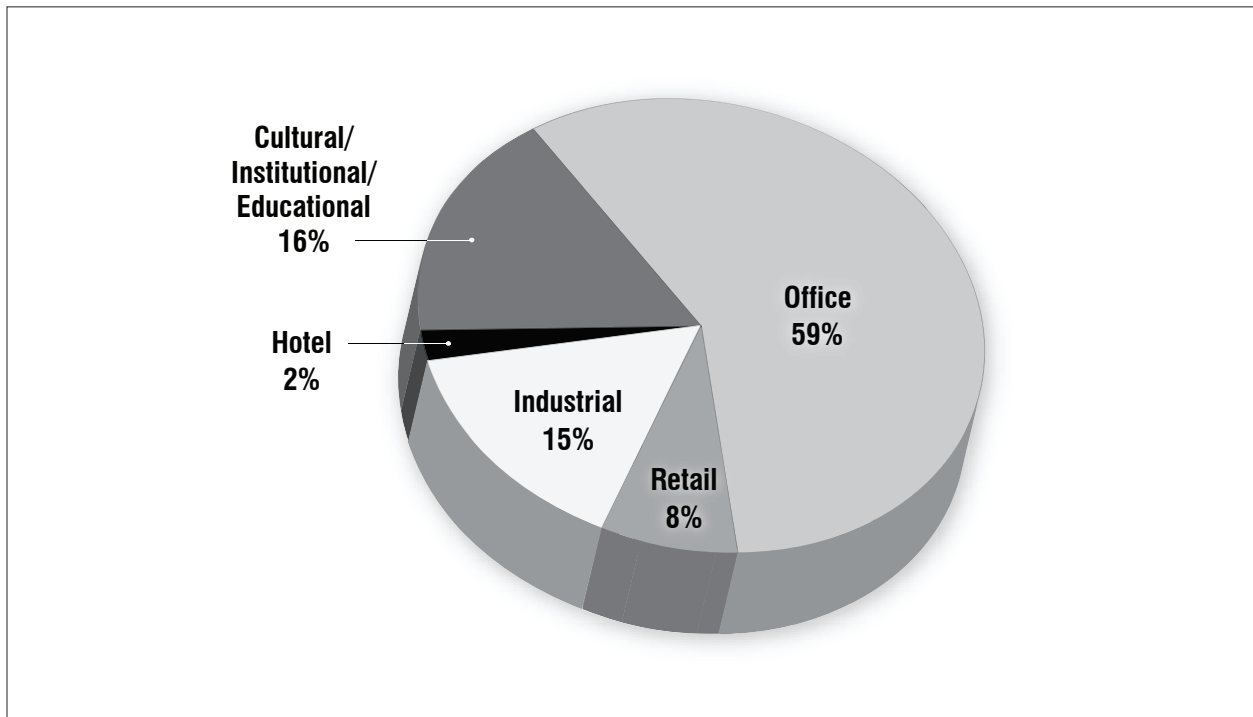


FIGURE 5.1.2 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1998-2007

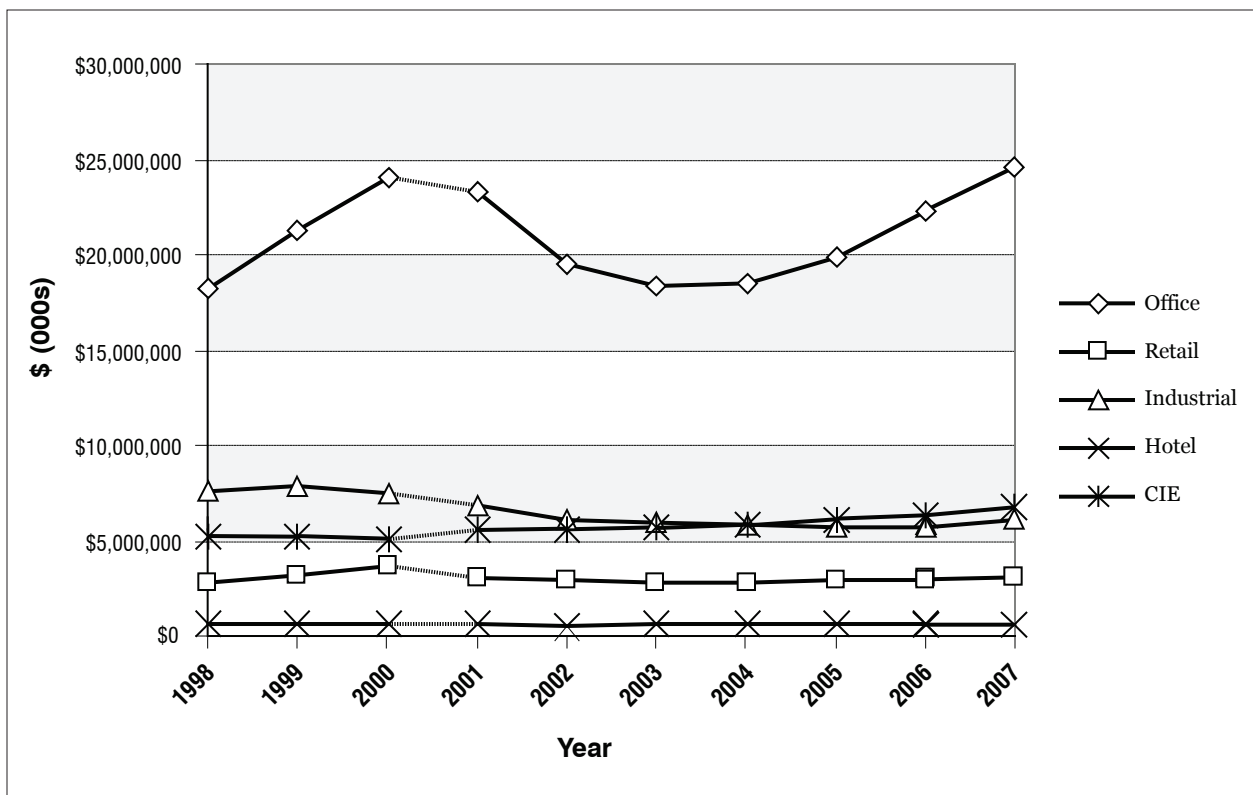


TABLE 5.1.2 ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 1998-2007

This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.3.

Wages per Worker (2007 \$)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	\$85,495	\$95,958	\$102,204	\$101,782	\$94,416	\$94,007	\$99,119	\$104,824	\$111,401	\$115,120
Retail	\$30,052	\$33,271	\$36,076	\$31,373	\$30,818	\$30,495	\$30,482	\$31,540	\$30,915	\$31,396
Industrial	\$64,882	\$68,551	\$66,050	\$65,684	\$64,582	\$64,985	\$67,743	\$69,858	\$72,727	\$74,603
Hotel	\$34,413	\$34,388	\$35,461	\$34,182	\$33,976	\$33,965	\$35,137	\$35,477	\$36,306	\$36,962
CIE	\$44,895	\$41,692	\$40,993	\$47,425	\$47,404	\$47,595	\$47,210	\$48,950	\$50,434	\$50,365
TOTAL	\$61,877	\$66,456	\$69,262	\$69,594	\$65,511	\$64,673	\$66,404	\$69,533	\$73,205	\$75,099

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07
Office	12.2	6.5	N/A	-7.2	-0.4	5.4	5.8	6.3	3.3
Retail	10.7	8.4	N/A	-1.8	-1.0	-0.0	3.5	-2.0	1.6
Industrial	5.7	-3.6	N/A	-1.7	0.6	4.2	3.1	4.1	2.6
Hotel	-0.1	3.1	N/A	-0.6	-0.0	3.4	1.0	2.3	1.8
CIE	-7.1	-1.7	N/A	-0.0	0.4	-0.8	3.7	3.0	-0.1
TOTAL	7.4	4.2	N/A	-5.9	-1.3	2.7	4.7	5.3	2.6

Note:

- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.

Sources:

- Employees from Table 3.1 of this report
- Wages from Table 5.1.1 of this report

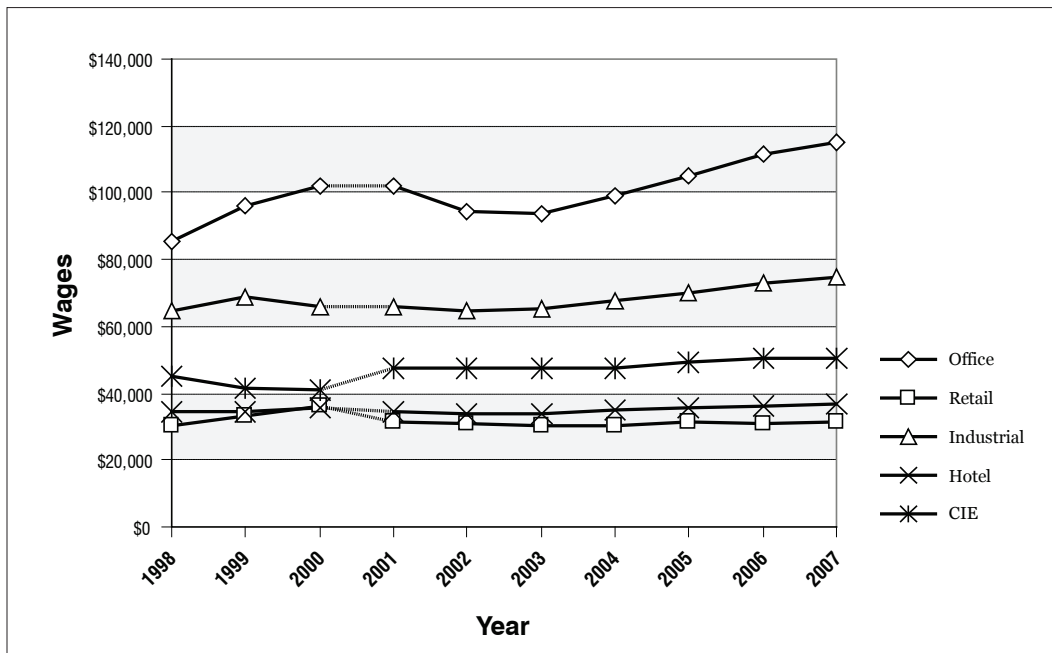
FIGURE 5.1.3 ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 1998-2007

TABLE 5.2.1 TAXABLE RETAIL SALES AND ALL OUTLET SALES, 1999-2007

This table conveys taxable sales in San Francisco from 1999-2007. The first table shows the amount of dollars as recorded each year, and the second shows this amount adjusted to reflect inflation. This information is presented graphically in Figure 5.2.1.

Nominal - Non-Adjusted for Inflation (\$ 000s)

Type of Sales	1999	2000	2001	2002	2003	2004	2005	2006	2007
All Retail Sales	\$7,678,089	\$8,750,456	\$7,990,386	\$7,641,958	\$7,767,688	\$8,414,781	\$9,049,788	\$9,588,520	\$9,444,088
All Outlets	\$12,338,760	\$14,089,926	\$12,455,236	\$11,589,440	\$11,496,746	\$12,207,507	\$13,025,974	\$13,892,188	\$14,462,170

Inflation-Adjusted (2007 \$ 000s)

Type of Sales	1999	2000	2001	2002	2003	2004	2005	2006	2007
All Retail Sales	\$9,616,439	\$10,491,224	\$9,090,610	\$8,554,558	\$8,543,673	\$9,144,852	\$9,645,726	\$9,902,393	\$9,444,088
All Outlets	\$15,453,707	\$16,892,899	\$14,170,241	\$12,973,447	\$12,646,889	\$13,266,637	\$13,883,748	\$14,346,938	\$14,462,170

Note:

- 2007 data only available for January to June. Full year estimated by doubling and adjusting by average ratio of January-June to July-December sales based on existing 1999-2006 data.

Sources:

- California State Board of Equalization, Taxable Sales in California; <http://www.boe.ca.gov/news/salescont07.htm>
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics
- Additional calculations by the San Francisco Planning Department

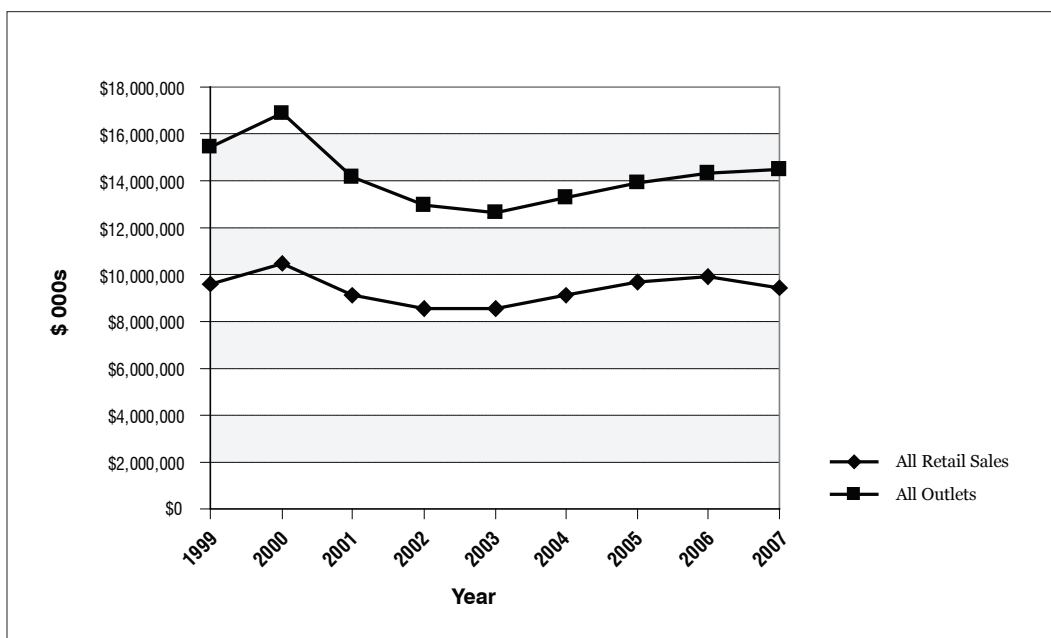
FIGURE 5.2.1 TAXABLE RETAIL SALES AND ALL OUTLET SALES, 1999-2007

TABLE 5.2.2 TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2007

This table looks more closely at the type of retail sales that occurred in 2007, as well as the number of sales permits issued in that time.

Type of Retail Sales	Sales Tax Permits	Taxable Sales Transactions (\$ 000s)
Apparel Stores	1,597	\$988,641
General Merchandise	396	\$1,307,022
Food Stores	1,050	\$476,288
Eating & Drinking	3,985	\$2,588,271
Home Furnishings & Appliances	1,063	\$609,005
Building Materials and Farm Implements	245	\$459,273
Service Stations	131	\$594,357
Automotive Dealers and Supplies	245	\$507,416
Other Retail Stores	6,913	\$2,413,825
Total Retail Stores	15,625	\$9,944,097
Total Outlets	27,906	\$14,462,156

Notes:

- 2007 data only available for January to June. Full year estimated by doubling and adjusting by average ratio of January-June to July-December sales based on existing 1999-2006 data.
- Other Retail Stores include:
 - Packaged liquor stores
 - Second hand merchandise
 - Farm and garden supply stores
 - Fuel and ice dealers
 - Mobile homes, trailers, and campers
 - Boat, motorcycle, and plane dealers
 - Specialty store group.
- In other derivations of BOE data all their retail stores includes farm implements.

Sources:

- California State Board of Equalization, Taxable Sales in California; <http://www.boe.ca.gov/news/tsalescont07.htm>
- Additional calculations by the San Francisco Planning Department

TABLE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2007

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2007. This data is shown graphically in Figure 5.3.2.

Revenue Source	Amount (\$ 000s)	Percentage Distribution
Property Taxes	\$1,107,864	30.9
Business Taxes	\$337,592	9.4
Other Local Taxes	\$668,824	18.7
Licenses, Permits, Fines & Penalties	\$36,299	1.0
Interest & Investment Income	\$83,846	2.3
Rents & Concessions	\$52,493	1.5
Intergovernmental	\$980,043	27.3
<i>Federal -</i>	\$381,688	10.6
<i>State -</i>	\$582,666	16.3
<i>Other -</i>	\$15,689	0.4
Charges for Services	\$273,057	7.6
Other	\$44,084	1.2
TOTAL	\$3,584,102	100.0

Note:

- Fiscal Year 2007 runs from July 1, 2006 to June 30 2007

Source:

- San Francisco Controller, Comprehensive Annual Financial Report.
<http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/07/Entire2007.pdf>

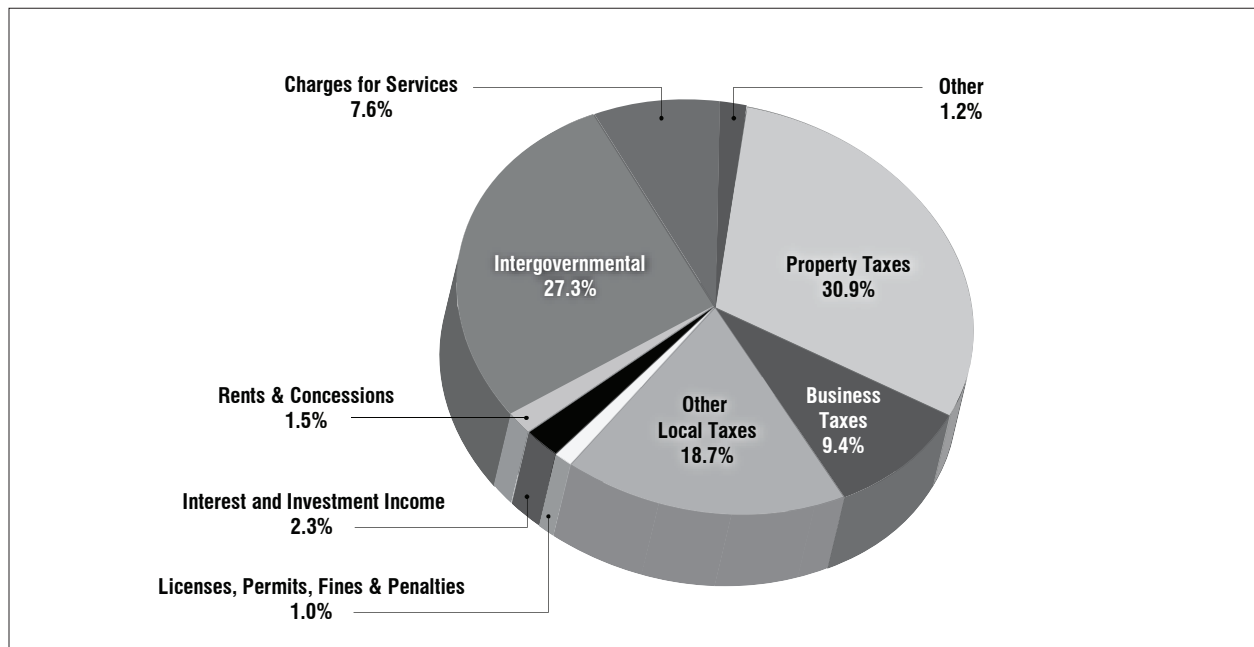
FIGURE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2007

TABLE 5.3.2 SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2007

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2007. This data is shown graphically in Figure 5.3.1.

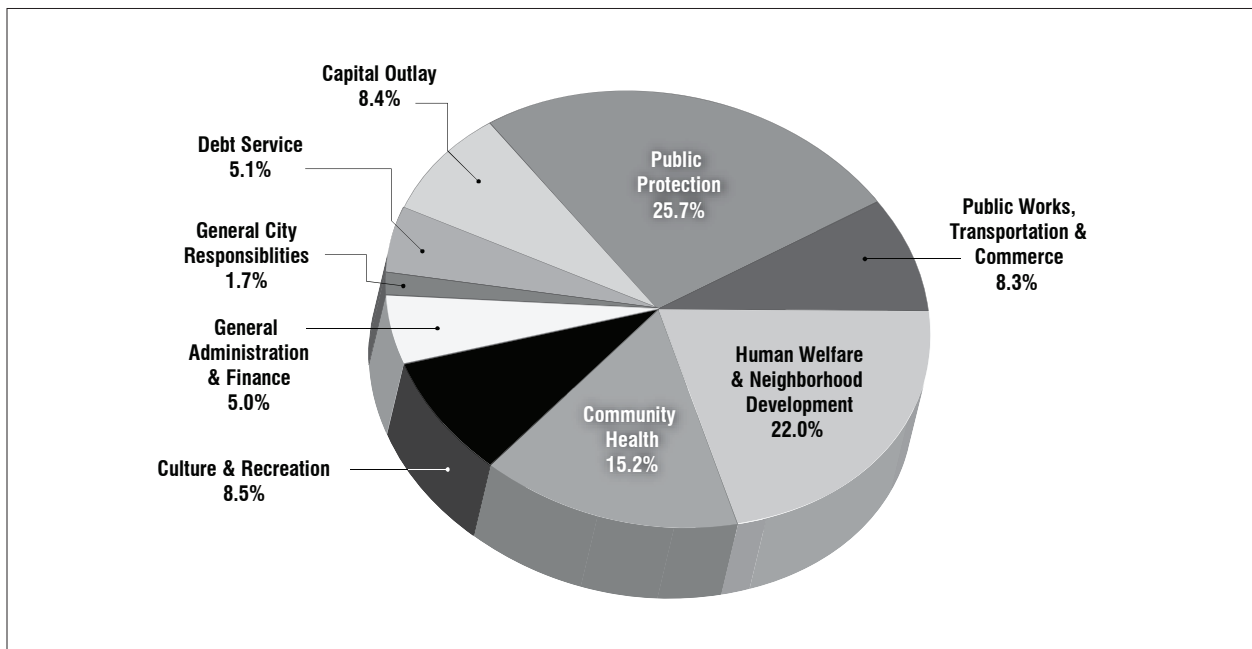
Expenditure Function	Amount (\$ 000s)	Percentage Distribution
Public Protection	\$865,556	25.7
Public Works, Transportation & Commerce	\$280,907	8.3
Human Welfare & Neighborhood Development	\$740,171	22.0
Community Health	\$509,844	15.2
Culture & Recreation	\$286,135	8.5
General Administration & Finance	\$167,505	5.0
General City Responsibilities	\$57,532	1.7
Debt Service	\$173,178	5.1
Capital Outlay	\$283,370	8.4
TOTAL	\$3,364,198	100.0

Note:

- Fiscal Year 2007 runs from July 1, 2006 to June 30, 2007

Source:

- San Francisco Controller, Comprehensive Annual Financial Report.
<http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/07/Entire2007.pdf>

FIGURE 5.3.2 SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2007

6.0 BUILDING AND LAND USE

The tables and graphs in this chapter present information about building permit applications for 1998 through 2007, as well as land use data for 2007. Building permit applications are filed at the City and County of San Francisco Department of Building Inspection (DBI) for construction of new buildings, demolitions, and alterations to existing structures. The number of permits, status of applications, and cost of projects are measures of construction activity in San Francisco. All information for this section was provided by DBI and has been reviewed and tabulated by Planning Department staff.

6.1 BUILDING

The discussion of building in San Francisco is presented in five sections.

Sections 6.1 and 6.2. Data are reported by the year that a project was filed with the Department of Building Inspection. In past Commerce & Industry Inventories, these tables were presented by Certificate of Final Completion, a later stage in the permit process. Certificates of Final Completion have proven difficult to track accurately. All applications filed may not ultimately lead to completed projects, but trends in the number of building permit applications filed are an important economic indicator. In Section 6.1, data are reported by Land Use Category; in Section 6.2, these data are reported by Commerce and Industry (C&I) District. For further information

on Land Use Categories and C&I Districts, refer to the Data Formats section in the Chapter 1. Tables in these sections are subdivided into three groups: all building permits, building permits for new construction activity, and building permits for alterations and demolitions. In turn, each group contains tables that report information on permits, total construction cost, and average construction cost by year, land use and C&I District. Annual percentage distributions and annual percentage changes are reported for numbers of permit applications and total construction costs. Construction cost values are adjusted for inflation using Saylor Inc.'s "Materials/Labor Cost Index for Construction," where 1983 is designated as the base year.

- *Table 6.1.1.A All Building Permits by Land Use Category, 1998-2007* — The number of building permits increased again in 2007 for the second year in a row. The annual fluctuation of permit application by land use category continued, with only Retail showing a decrease.
- *Table 6.1.1.B Total Construction Costs for All Building Permits by Land Use Category, 1998-2007* — Total construction costs decreased almost 4% in 2007 after decreasing almost 8% in 2006. The largest drop occurring in the Residential category (22%), followed by Other (18%). Industrial construction costs, however, showed a major surge, increasing some 132% in the last year.

- *Table 6.1.1.C Average Construction Costs for All Building Permits by Land Use Category, 1998-2007* — Average construction costs decreased in 2007 for the second year in a row. However, this decline is not an indication of a downward trend because of the varied and random nature of the permit application process. For example, in a given year, a few very expensive projects can skew the entire total.
- *Table 6.1.2.A Building Permits for New Construction by Land Use Category, 1998-2007* — The number of building permits for new construction decreased about 18% in 2007. The biggest category decline was for CIE permits (39%). However, the number of new construction projects in the Office category more than doubled. Other and Hotel categories, which see very little permitting activity for new construction over the years, show normal annual fluctuation.
- *Table 6.1.2.B Total Construction Costs for New Construction by Land Use Category, 1998-2007* — Total new construction costs decreased substantially in 2007, almost entirely driven by a decrease in residential permitting activity. However, Retail and Industrial construction costs, which contributed a combined 11% of total construction costs collected in 2007, showed marked increases.
- *Table 6.1.2.C Average Construction Costs for New Construction by Land Use Category, 1998-2007* — Average new construction costs fell 18% in 2007. As stated earlier, it is difficult to discern a trend given the varied nature of the permitting process.
- *Table 6.1.3.A Building Permits for Alteration and Demolition by Land Use Category, 1998-2007* — The number of permits for alterations and demolitions has remained largely constant for a number of years. The number of overall alteration and demolition permits rose slightly (1.7% increase) in 2007.
- *Table 6.1.3.B Total Construction Costs for Alterations and Demolitions by Land Use Category, 1998-2007* — Total construction costs for alterations and demolitions rose 22% in 2007. The largest fluctuations in 2007 occurred within the Office and Residential land use categories.
- *Table 6.1.3.C Average Construction Costs for Alterations and Demolitions by Land Use Category, 1998-2007* — Average construction cost for demolitions and alterations rose 20% in 2007 after having remained relatively stable for the preceding six years, with some fluctuation by land use category.
- *Table 6.2.1.A All Building Permits by Commerce & Industry District, 1998-2007* — There was little change in the distribution of permits by district over the past three years. Increases in the Civic Center and Van Ness districts more than offset losses in the South of Market district. The Southwest district is by far the most active C&I district for permit activity, consistently accounting for at least a third of all permits.
- *Table 6.2.1.B Total Construction Costs for All Building Permits by Commerce & Industry District, 1998-2007* — Overall construction costs declined by 3.5% from 2006 to 2007. The South of Market and Financial districts continued to have the highest share in the distribution of construction costs.
- *Table 6.2.1.C Average Construction Costs for All Building Permits by Commerce & Industry District, 1998-2007* — Average construction cost fluctuates greatly by year and C&I district, which is not atypical. Given this, it is difficult to assess any patterns. Citywide, the average permit cost was lower in 2007 by 5.6%.
- *Table 6.2.2.A Building Permits for New Construction by Commerce & Industry District, 1998-2007* — Overall, permits for new construction decreased more than 18% between 2006 and 2007. There

was some fluctuation in the number of permits issued for new construction by district, including significant decreases in the Bayview, Civic Center, and South of Market districts. The Mission is the sole district that showed a modest increase in new construction permits in 2007.

- *Table 6.2.2.B Total Construction Costs for New Construction by Commerce & Industry District, 1998-2007* — There was substantial changes by district in the cost for new construction between 2006 and 2007, as almost every district posted double-digit changes. This is not atypical of new construction costs. Overall new construction costs declined by 33.1% from 2006 to 2007.
- *Table 6.2.2.C Average Construction Costs for New Construction by Commerce & Industry District, 1998-2007* — Given the fluctuations in total construction cost, the fluctuation in average cost is to be expected. Citywide, the average cost of permits for new construction decreased by 18% between 2006 and 2007.
- *Table 6.2.3.A Building Permits for Alteration and Demolition by Commerce & Industry District, 1998-2007* — Citywide, permits for alterations and demolitions rose by 1.7%. Geographic distribution of permits for alterations or demolitions is largely consistent with previous years. The largest changes occurring in the Civic Center and Van Ness districts which saw increases of 30% and 27%, respectively; the largest negative turnaround in the South of Market district (-11%).
- *Table 6.2.3.B Total Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1998-2007* — Just as the number of permits for alterations and demolitions varied through the years for most districts, so did total construction costs. As in previous years, the South of Market and the Financial districts reported the most total construction costs.
- *Table 6.2.3.C Average Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1998-2007* — Like total costs,

average costs also fluctuated from 2006 to 2007 for most districts.

Section 6.3. Permit and construction cost data are cross-tabulated by Land Use Category and C&I District. This section includes all permit applications filed in 2007.

- *Table 6.3.A Permit Applications by Commerce & Industry District and Land Use Category, 2007* — The Residential land use category is by far the largest generator of building permits, accounting for 71.2% of all permits in 2007. The Southwest district generated 43.2% of the Residential permits. Two-thirds of all Office permits were for projects located in the Financial district. Retail permit activity was highest in the South of Market district (20.8%). Most Industrial permit applications tended to be for projects in the South of Market (41.9%) and Bayview (24.7%) districts. More than a third of Hotel permits were located in the Civic Center district. CIE permits tended to be more widely distributed among the C&I districts.
- *Table 6.3.B Total Construction Costs of All Permits by Commerce & Industry District and Land Use Category, 2007* — Construction costs for office permits were greatest in the Financial (44.7%) and South of Market (35.5%) districts. The Southwest, South of Market, and North Central districts accounted for the highest percentage of residential construction costs, accounting for 20.9%, 19.5%, and 13.9% respectively. The majority of retail construction spending occurred in the South of Market (26.6%) and Mission (24.3%) districts. CIE permit costs were concentrated in the North Central (34.6%) and Southwest (29.7%) districts, while Hotel permit spending was highest in the Van Ness district (40%).
- *Table 6.3.C Average Construction Costs of All Permits by Commerce & Industry District and Land Use Category, 2007* — Average construction costs were highest for Hotel, CIE, and Industrial permits at \$251,600, \$220,600 and \$220,200 respectively. Among the districts, average construction costs were highest for the Mission district (\$268,800).

Section 6.4 describes permit applications by application status by Land Use Category and then by C&I District for 2007. These permit status categories are grouped into the following five major categories: building permit applications which were approved for construction; whether or not a permit has been issued; building permit applications which were canceled, including applications which have been withdrawn, revoked or disapproved; building permit applications where the authorized work has been completed; and other, which includes applications which have not yet been acted upon, have been abandoned, reinstated, appealed, or for which no information is available.

- *Table 6.4.1.A All Building Permits by Land Use Category and Permit Status, 2007* — Residential permits accounted for the majority of permits, making up more than 70% in both the Completed and Issued categories and in total permits. Almost all Building permits were concentrated in either the Completed (54.9%) or Issued (39.8%) permit status category.
- *Table 6.4.1.B Total Construction Costs of All Building Permits by Land Use Category and Permit Status, 2007* — More than 97% of all construction costs were in the Issued (48.1%), Other (25.4%), or Completed (23.7%) permit status. More than half (51.4%) of Completed construction costs were in the Office land use category. Close to half (45.5%) of Issued construction costs and 54% of Other construction costs were in the Residential land use category in 2007 indicating that a great deal of housing development was both under construction and in the pipeline at that time.
- *Table 6.4.1.C Average Construction Costs of All Permits by Land Use Category and Permit Status, 2007* — Generally, the average construction costs for permits in the Approved and Other categories were considerably higher than those in other categories. This disparity may be the result of the increased costs of building materials (concrete, lumber, steel, etc.) associated with those permits filed more recently and still under review. The most expensive average construction cost was for Industrial projects in the Other category where the average cost topped \$2,356,000.
- *Table 6.4.2.A All Building Permits by Commerce & Industry District and Permit Status, 2007* — About a third of both Completed and Issued permits were in the Southwest district. The Financial district had the next highest percentage of permits that were completed (15.4%) while the North Central district had the next highest percentage of Issued permits (14.4%).
- *Table 6.4.2.B Total Construction Costs of All Building Permits by Commerce & Industry District and Permit Status, 2007* — The Financial district had the highest share of total construction costs for completed projects (40.9%) followed by Southwest (15.5%) and South of Market (13.0%). Issued permit construction costs were highest in the South of Market district (27%). Construction costs for projects in the Other category were concentrated in the South of Market (30.9%), Van Ness (17.7%), and Financial (16.7%) districts.
- *Table 6.4.2.C Average Construction Costs of All Permits by Commerce & Industry District and Permit Status, 2007* — Average construction costs for Issued permits generally tended to be higher than Completed projects, and projects in the Other category were higher still than those in the Issued category. Once again, the rising cost of construction materials and other components associated with construction may be behind these disparities. Of particular note are the very high average construction costs for projects in the Other category for both the Van Ness and South of Market districts indicating that there may be some very large projects currently in the pipeline.

The construction cost data reported in these tables are the estimated construction cost for each project, as reported by DBI. Total and average construction cost measure the scope, complexity, and extent of construction activity in San Francisco. While total construction cost indicates the size and complexity of construction activity in San Francisco for a particular

year, average construction cost relates number of applications to total construction cost, allowing for consideration of construction cost per building permit application. Construction cost values are adjusted for inflation using Saylor Inc.'s *Materials/Labor Cost Index for Construction*, where 1983 is designated as the base year (1983=100).

Section 6.5 reports total office space in San Francisco from 1997 to 2006. It includes absolute numbers as well as percentage changes over time. These data do not come from DBI, but rather from Cushman-Wakefield realtors.

- *Table 6.5 Total Existing Office Space in Central and Non-Central Business Districts, 1998-2007* — Total office space increased slightly between 2006 and 2007. The rate of growth outside the Central Business District surpassed that of the Central Business District.

6.2 LAND USE

Section 6.6 reports land use activity in San Francisco. Land use, for this section, is determined by incorporating both the business type on the parcel and the location of that parcel. Business data are culled from the Dun & Bradstreet databases. Dun & Bradstreet is a firm that conducts national surveys of existing businesses, gathering information which includes number of employees, square footage of businesses, and an industry classification system which best classifies those businesses. A parcel has to have 80% or more of its usable building space occupied by one specific land use in order to warrant that particular land use classification. Less than 80% in any one land use results in a Mixed Uses designation. If either the Planning Department or the Department of Building Inspection has a record of a residence on a lot, it is determined to be of a Residential land use. If a lot contains a residence and a business establishment, that lot is classified as Mixed Residential.

Land Use is also determined by the location of a given parcel. The impact of location on land use classification is illustrated by the following example. If an establishment with a NAICS (North American Industry

Classification System) code of 236 (Construction) is in the Financial District, it will be classified as Office use. If an establishment with the same NAICS code is located in South of Market or Bayview districts, it will be classified as Industrial. Construction is generally considered part of the Industrial land use classification. In the above scenario, however, the Financial District location of a construction business indicates that the business is conducting management, information, or professional services in more of an office setting and should therefore be assigned an Office land use classification.

The NAICS code for land uses under Office, Retail, Industrial, Hotel, and Cultural/Institutional/Educational (CIE) land use categories are noted in Table 1.2, Chapter 1. The Residential land use category data are gathered from Housing Inventory and Building Inspection's Permit Tracking System. Vacant sites data are gathered from information supplied by the Assessor's Office. Table 6.6 provides details on the amount of square footage for each land use, as a predominant use on each parcel of land, in 21 distinct plan areas in San Francisco. For the first time, the 2008 Commerce and Industry Inventory includes Treasure Island and Yerba Buena Island in the total land use calculations. Map 6.6 shows the location of the plan areas. Table 6.6 is based on the information available in year 2007.

- *Table 6.6 Land Use Square Footage by Plan Area, 2007* — Not including streets or freeways, San Francisco has just over a billion square feet of land area. Residential is the largest single land use category accounting for 40.5% of land area in San Francisco followed by public land and open space with 25.9%.

Of the 21 plan areas, most of the land area (64.2%) can be found in the Rest of the City area. Otherwise, only the Bayview (7.1%) and the Presidio (6.3%) constitute sizable portions of land area.

The Bayview plan area has the most Industrial (38.1%) land in the city. Other plan areas with significant industrial land were the Central Waterfront (19.7%) and the Port (11.1%).

TABLE 6.1.1.A ALL BUILDING PERMITS BY LAND USE CATEGORY, 1998-2007

This table presents the number of building permits filed by land use category (see Chapter 1.2 – Data Formats for a definition of land use categories). All building permits include new construction, alterations, and demolitions. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	TOTAL
Office	3,825	4,130	5,344	4,195	3,181	3,581	3,813	4,202	4,133	4,366	40,770
Retail	2,119	2,136	1,790	1,787	1,745	1,753	1,887	1,661	2,139	1,852	18,869
Industrial	224	284	345	315	239	211	176	185	170	198	2,347
Hotel	173	172	248	191	184	196	183	144	193	253	1,937
CIE	532	553	419	452	512	432	364	356	429	459	4,508
Residential	18,128	18,416	18,072	17,388	19,426	19,712	19,930	19,508	19,653	19,939	190,172
Other	828	883	1,213	933	625	766	724	779	689	931	8,371
TOTAL	25,829	26,574	27,431	25,261	25,912	26,651	27,077	26,835	27,406	27,998	266,974

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	14.8	15.5	19.5	16.6	12.3	13.4	14.1	15.7	15.1	15.6	15.3
Retail	8.2	8.0	6.5	7.1	6.7	6.6	7.0	6.2	7.8	6.6	7.1
Industrial	0.9	1.1	1.3	1.2	0.9	0.8	0.6	0.7	0.6	0.7	0.9
Hotel	0.7	0.6	0.9	0.8	0.7	0.7	0.7	0.5	0.7	0.9	0.7
CIE	2.1	2.1	1.5	1.8	2.0	1.6	1.3	1.3	1.6	1.6	1.7
Residential	70.2	69.3	65.9	68.8	75.0	74.0	73.6	72.7	71.7	71.2	71.2
Other	3.2	3.3	4.4	3.7	2.4	2.9	2.7	2.9	2.5	3.3	3.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Office	8.0	29.4	-21.5	-24.2	12.6	6.5	10.2	-1.6	5.6	2.8
Retail	0.8	-16.2	-0.2	-2.4	0.5	7.6	-12.0	28.8	-13.4	-0.7
Industrial	26.8	21.5	-8.7	-24.1	-11.7	-16.6	5.1	-8.1	16.5	0.1
Hotel	-0.6	44.2	-23.0	-3.7	6.5	-6.6	-21.3	34.0	31.1	6.7
CIE	3.9	-24.2	7.9	13.3	-15.6	-15.7	-2.2	20.5	7.0	-0.6
Residential	1.6	-1.9	-3.8	11.7	1.5	1.1	-2.1	0.7	1.5	1.1
Other	6.6	37.4	-23.1	-33.0	22.6	-5.5	7.6	-11.6	35.1	4.0
TOTAL	2.9	3.2	-7.9	2.6	2.9	1.6	-0.9	2.1	2.2	1.0

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.1.B TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS
BY LAND USE CATEGORY, 1998-2007**

This table presents the total cost of construction associated with building permits filed by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	\$943,559	\$330,270	\$827,426	\$233,256	\$179,323	\$156,504	\$186,497	\$210,249	\$317,964	\$378,393
Retail	\$103,408	\$323,704	\$236,699	\$76,120	\$66,935	\$85,382	\$56,203	\$49,522	\$75,189	\$94,333
Industrial	\$15,245	\$25,733	\$74,319	\$29,060	\$18,942	\$9,708	\$12,622	\$7,951	\$8,804	\$20,449
Hotel	\$77,874	\$25,769	\$124,006	\$21,231	\$86,498	\$4,399	\$2,770	\$16,249	\$33,284	\$29,850
CIE	\$73,131	\$47,694	\$130,103	\$135,717	\$63,152	\$67,649	\$120,892	\$32,409	\$61,103	\$47,499
Residential	\$574,789	\$515,561	\$515,867	\$510,984	\$628,357	\$488,554	\$620,579	\$901,855	\$611,374	\$500,738
Other	\$5,711	\$6,578	\$14,637	\$12,429	\$3,129	\$3,398	\$8,174	\$4,382	\$17,878	\$14,564
TOTAL	\$1,793,717	\$1,275,310	\$1,923,057	\$1,018,798	\$1,046,337	\$815,595	\$1,007,737	\$1,222,617	\$1,125,597	\$1,085,824

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Office	52.6	25.9	43.0	22.9	17.1	19.2	18.5	17.2	28.2	34.8
Retail	5.8	25.4	12.3	7.5	6.4	10.5	5.6	4.1	6.7	8.7
Industrial	0.8	2.0	3.9	2.9	1.8	1.2	1.3	0.7	0.8	1.9
Hotel	4.1	3.7	6.8	13.3	6.0	8.3	12.0	2.7	3.0	2.7
CIE	4.3	2.0	6.4	2.1	8.3	0.5	0.3	1.3	5.4	4.4
Residential	32.0	40.4	26.8	50.2	60.1	59.9	61.6	73.8	54.3	46.1
Other	0.3	0.5	0.8	1.2	0.3	0.4	0.8	0.4	1.6	1.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Office	-65.0	150.5	-71.8	-23.1	-12.7	19.2	12.7	51.2	19.0	8.9
Retail	213.0	-26.9	-67.8	-12.1	27.6	-34.2	-11.9	51.8	25.5	18.3
Industrial	68.8	188.8	-60.9	-34.8	-48.7	30.0	-37.0	10.7	132.3	27.7
Hotel	-34.8	172.8	4.3	-53.5	7.1	78.7	-73.2	2.7	-10.3	20.0
CIE	-66.9	381.2	-82.9	307.4	-94.9	-37.0	486.5	276.0	-22.3	108.4
Residential	-10.3	0.1	-0.9	23.0	-22.2	27.0	45.3	-32.2	-18.1	1.3
Other	15.2	122.5	-15.1	-74.8	8.6	140.6	-46.4	308.0	-18.5	48.9
TOTAL	-28.9	50.8	-47.0	2.7	-22.1	23.6	21.3	-7.9	-3.5	-1.2

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.1.C AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS
BY LAND USE CATEGORY, 1998-2007**

This table presents the average construction cost for all building permits filed by land use category. It represents the total costs (Table 6.1.1.A) divided by the total permits (Table 6.1.1.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	\$246.7	\$80.0	\$154.8	\$55.6	\$56.4	\$43.7	\$48.9	\$50.0	\$76.9	\$86.7	\$90.0
Retail	\$48.8	\$151.5	\$132.2	\$42.6	\$38.4	\$48.7	\$29.8	\$29.8	\$35.2	\$50.9	\$60.8
Industrial	\$68.1	\$90.6	\$215.4	\$92.3	\$79.3	\$46.0	\$71.7	\$43.0	\$51.8	\$103.3	\$86.1
Hotel	\$450.1	\$149.8	\$500.0	\$111.2	\$470.1	\$22.4	\$15.1	\$112.8	\$172.5	\$118.0	\$212.2
CIE	\$137.5	\$86.2	\$310.5	\$300.3	\$123.3	\$156.6	\$332.1	\$91.0	\$142.4	\$103.5	\$178.3
Residential	\$31.7	\$28.0	\$28.5	\$29.4	\$32.3	\$24.8	\$31.1	\$46.2	\$31.1	\$25.1	\$30.8
Other	\$6.9	\$7.5	\$12.1	\$13.3	\$5.0	\$4.4	\$11.3	\$5.6	\$25.9	\$15.6	\$10.8
Average	\$69.4	\$48.0	\$70.1	\$40.3	\$40.4	\$30.6	\$37.2	\$45.6	\$41.1	\$38.8	\$46.1

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2001- 02	2003-04	2004-05	2005-06	2006-07
Office	-67.6	93.6	-64.1	1.4	-22.5	11.9	2.3	53.8	12.7
Retail	210.5	-12.7	-67.8	-10.0	27.0	-38.8	0.1	17.9	44.9
Industrial	33.1	137.7	-57.2	-14.1	-41.9	55.9	-40.1	20.5	99.4
Hotel	-66.7	233.8	-77.8	322.9	-95.2	-32.6	645.4	52.8	-31.6
CIE	-37.3	260.0	-3.3	-58.9	27.0	112.1	-72.6	56.5	-27.3
Residential	-11.7	2.0	3.0	10.1	-23.4	25.6	48.5	-32.7	-19.3
Other	8.0	62.0	10.4	-62.4	-11.4	154.5	-50.2	361.3	-39.7
TOTAL	-30.9	46.1	-42.5	0.1	-24.2	21.6	22.4	-9.9	-5.6

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.2.A BUILDING PERMITS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 1998-2007

This table presents the number of building permits filed for new construction by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	TOTAL
Office	8	9	36	5	8	4	2	6	5	11	85
Retail	23	28	25	28	23	16	16	10	10	8	207
Industrial	17	15	13	10	8	5	7	4	13	7	97
Hotel	2	1	2	1	2	0	0	0	1	0	9
CIE	12	9	8	17	6	11	9	5	18	11	116
Residential	384	422	343	250	216	252	189	260	179	150	2,795
Other	1	1	4	2	2	0	2	0	4	1	16
TOTAL	447	485	431	313	265	288	225	285	230	188	3,157

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	1.8	1.9	8.4	1.6	3.0	1.4	0.9	2.1	2.2	5.9	2.9
Retail	5.1	5.8	5.8	8.9	8.7	5.6	7.1	3.5	4.3	4.3	5.9
Industrial	3.8	3.1	3.0	3.2	3.0	1.7	3.1	1.4	5.7	3.7	3.2
Hotel	0.4	0.2	0.5	0.3	0.8	0.0	0.0	0.0	0.4	0.0	0.3
CIE	2.7	1.9	1.9	5.4	2.3	3.8	4.0	1.8	7.8	5.9	3.7
Residential	85.9	87.0	79.6	79.9	81.5	87.5	84.0	91.2	77.8	79.8	83.4
Other	0.2	0.2	0.9	0.6	0.8	0.0	0.9	0.0	1.7	0.5	0.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Office	12.5	300.0	-86.1	60.0	-50.0	-50.0	200.0	-16.7	120.0	54.4
Retail	21.7	-10.7	12.0	-17.9	-30.4	0.0	-37.5	0.0	-20.0	-9.2
Industrial	-11.8	-13.3	-23.1	-20.0	-37.5	40.0	-42.9	225.0	-46.2	7.8
Hotel	-50.0	100.0	-50.0	100.0	-100.0	-	-	-	-100.0	-10.0
CIE	-25.0	-11.1	112.5	-64.7	83.3	-18.2	-44.4	260.0	-38.9	28.2
Residential	9.9	-18.7	-27.1	-13.6	16.7	-25.0	37.6	-31.2	-16.2	-7.5
Other	0.0	300.0	-50.0	0.0	-100.0	-	-100.0	-	-75.0	-4.2
TOTAL	8.5	-11.1	-27.4	-15.3	8.7	-21.9	26.7	-19.3	-18.3	-7.7

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION
BY LAND USE CATEGORY, 1998-2007**

This table presents the total cost of new construction associated with building permits filed by land use category from 1998 - 2007. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	TOTAL
Office	\$61,158	\$69,095	\$485,719	\$13,458	\$27,341	\$1,218	\$17,636	\$13,625	\$110,039	\$92,421	\$891,710
Retail	\$28,546	\$34,691	\$161,636	\$24,204	\$20,471	\$34,792	\$9,488	\$4,274	\$527	\$22,101	\$340,731
Industrial	\$6,430	\$8,623	\$25,607	\$13,110	\$9,725	\$1,685	\$2,500	\$460	\$1,932	\$14,569	\$84,640
Hotel	\$43,665	\$12,164	\$30,029	\$2,879	\$76,341	\$0	\$0	\$0	\$5,727	\$0	\$170,805
CIE	\$22,134	\$10,148	\$89,541	\$105,377	\$30,200	\$20,783	\$15,867	\$7,791	\$16,563	\$9,001	\$327,405
Residential	\$401,616	\$296,264	\$268,354	\$284,073	\$338,534	\$199,517	\$369,527	\$633,955	\$375,230	\$203,202	\$3,370,271
Other	\$487	\$0	\$4,382	\$0	\$0	\$0	\$108	\$0	\$0	\$129	\$5,106
TOTAL	\$564,037	\$430,985	\$1,065,268	\$443,100	\$502,611	\$257,995	\$415,126	\$660,105	\$510,018	\$341,423	\$5,190,667

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	10.8	16.0	45.6	3.0	5.4	0.5	4.2	2.1	21.6	27.1	13.6
Retail	5.1	8.0	15.2	5.5	4.1	13.5	2.3	0.6	0.1	6.5	6.1
Industrial	1.1	2.0	2.4	3.0	1.9	0.7	0.6	0.1	0.4	4.3	1.6
Hotel	7.7	2.8	2.8	0.6	15.2	0.0	0.0	0.0	1.1	0.0	3.0
CIE	3.9	2.4	8.4	23.8	6.0	8.1	3.8	1.2	3.2	2.6	6.3
Residential	71.2	68.7	25.2	64.1	67.4	77.3	89.0	96.0	73.6	59.5	69.2
Other	0.1	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Office	13.0	603.0	-97.2	103.2	-95.5	1348.0	-22.7	707.6	-16.0	282.6
Retail	21.5	365.9	-85.0	-15.4	70.0	-72.7	-55.0	-87.7	4,090.9	470.3
Industrial	34.1	197.0	-48.8	-25.8	-82.7	48.4	-81.6	319.8	654.2	112.7
Hotel	-72.1	146.9	-90.4	2551.9	-100.0	-	-	-	-100.0	487.2
CIE	-54.2	782.4	17.7	-71.3	-31.2	-23.7	-50.9	112.6	-45.7	70.6
Residential	-26.2	-9.4	5.9	19.2	-41.1	85.2	71.6	-40.8	-45.8	2.0
Other	-100.0	-	-100.0	-	-	-	-	-	-	-100.0
TOTAL	-23.6	147.2	-58.4	13.4	-48.7	60.9	59.0	-22.7	-33.1	10.5

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.2.C AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION
BY LAND USE CATEGORY, 1998-2007**

This table presents the average cost of new construction for all building permits filed by land use category. It represents the total costs (Table 6.1.2.A) divided by the total permits (Table 6.1.2.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	\$7,644.8	\$7,677.2	\$13,492.2	\$2,691.6	\$3,417.6	\$304.5	\$8,818.0	\$2,270.8	\$22,007.7	\$8,401.9	\$7,672.6
Retail	\$1,241.1	\$1,239.0	\$6,465.4	\$864.4	\$890.0	\$2,174.5	\$593.0	\$427.4	\$52.7	\$2,762.7	\$1,671.0
Industrial	\$378.2	\$574.9	\$1,969.8	\$1,311.0	\$1,215.6	\$337.0	\$357.1	\$115.0	\$148.6	\$2,081.3	\$848.8
Hotel	\$21,832.7	\$12,164.1	\$15,014.7	\$2,878.8	\$38,170.3	-	-	-	\$5,726.8	-	\$15,964.6
CIE	\$1,844.5	\$1,127.5	\$11,192.6	\$6,198.7	\$5,033.3	\$1,889.4	\$1,763.0	\$1,558.3	\$920.2	\$818.3	\$3,234.6
Residential	\$1,045.9	\$702.0	\$782.4	\$1,136.3	\$1,567.3	\$791.7	\$1,955.2	\$2,438.3	\$2,096.3	\$1,354.7	\$1,387.0
Other	\$486.7	\$0.0	\$1,095.5	\$0.0	\$0.0	-	\$54.0	-	\$0.0	\$129.0	\$220.7
TOTAL	\$1,261.8	\$888.6	\$2,471.6	\$1,415.7	\$1,896.6	\$895.8	\$1,845.0	\$2,316.2	\$2,217.5	\$1,816.1	\$1,702.5

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2001- 02	2003-04	2004-05	2005-06	2006-07
Office	0.4	75.7	-80.1	27.0	-91.1	2,796.1	-74.2	869.2	-61.8
Retail	-0.2	421.8	-86.6	3.0	144.3	-72.7	-27.9	-87.7	5,138.6
Industrial	52.0	242.7	-33.4	-7.3	-72.3	6.0	-67.8	29.2	1,300.6
Hotel	-44.3	23.4	-80.8	1,225.9	-	-	-	-	-
CIE	-38.9	892.7	-44.6	-18.8	-62.5	-6.7	-11.6	-40.9	-11.1
Residential	-32.9	11.4	45.2	37.9	-49.5	146.9	24.7	-14.0	-35.4
Other	-100.0	-	-100.0	-	-	-	-	-	-
TOTAL	-29.6	178.1	-42.7	34.0	-52.8	106.0	25.5	-4.3	-18.1

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.3.A BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS
BY LAND USE CATEGORY, 1998-2007**

This table presents the number of building permits filed for alterations and demolitions by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	TOTAL
Office	3,817	4,121	5,308	4,189	3,173	3,577	3,811	4,196	4,128	4,355	40,675
Retail	2,096	2,108	1,765	1,760	1,722	1,737	1,871	1,651	2,129	1,844	18,683
Industrial	207	269	332	305	231	206	169	181	157	191	2,248
Hotel	171	171	246	190	182	196	183	144	192	253	1,928
CIE	520	544	411	435	506	421	355	351	411	448	4,402
Residential	17,744	17,993	17,730	17,138	19,210	19,460	19,741	19,249	19,474	19,789	187,528
Other	283	269	645	444	284	267	273	379	264	335	3,443
TOTAL	24,838	25,475	26,437	24,461	25,308	25,864	26,403	26,151	26,755	27,215	258,907

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	15.4	16.2	20.1	17.1	12.5	13.8	14.4	16.0	15.4	16.0	15.7
Retail	8.4	8.3	6.7	7.2	6.8	6.7	7.1	6.3	8.0	6.8	7.2
Industrial	0.8	1.1	1.3	1.2	0.9	0.8	0.6	0.7	0.6	0.7	0.9
Hotel	0.7	0.7	0.9	0.8	0.7	0.8	0.7	0.6	0.7	0.9	0.7
CIE	2.1	2.1	1.6	1.8	2.0	1.6	1.3	1.3	1.5	1.6	1.7
Residential	71.4	70.6	67.1	70.1	75.9	75.2	74.8	73.6	72.8	72.7	72.4
Other	1.1	1.1	2.4	1.8	1.1	1.0	1.0	1.4	1.0	1.2	1.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Office	8.0	28.8	-21.1	-24.3	12.7	6.5	10.1	-1.6	5.5	2.7
Retail	0.6	-16.3	-0.3	-2.2	0.9	7.7	-11.8	29.0	-13.4	-0.6
Industrial	30.0	23.4	-8.1	-24.3	-10.8	-18.0	7.1	-13.3	21.7	0.9
Hotel	0.0	43.9	-22.8	-4.2	7.7	-6.6	-21.3	33.3	31.8	6.9
CIE	4.6	-24.4	5.8	16.3	-16.8	-15.7	-1.1	17.1	9.0	-0.6
Residential	1.4	-1.5	-3.3	12.1	1.3	1.4	-2.5	1.2	1.6	1.3
Other	-4.9	139.8	-31.2	-36.0	-6.0	2.2	38.8	-30.3	26.9	11.0
TOTAL	2.6	3.8	-7.5	3.5	2.2	2.1	-1.0	2.3	1.7	1.1

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.3.B TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS
BY LAND USE CATEGORY, 1998-2007**

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	TOTAL
Office	\$882,401	\$261,175	\$341,707	\$219,798	\$151,983	\$155,286	\$168,861	\$196,625	\$207,926	\$285,972	\$2,871,733
Retail	\$74,861	\$289,013	\$75,063	\$51,916	\$46,464	\$50,590	\$46,714	\$45,248	\$74,662	\$72,232	\$826,764
Industrial	\$8,815	\$17,111	\$48,712	\$15,951	\$9,217	\$8,023	\$10,122	\$7,491	\$6,872	\$5,880	\$138,193
Hotel	\$34,208	\$13,605	\$93,976	\$18,352	\$10,157	\$4,399	\$2,770	\$16,249	\$27,521	\$29,850	\$251,088
CIE	\$50,997	\$37,546	\$40,562	\$30,340	\$32,952	\$46,866	\$105,026	\$24,618	\$44,540	\$38,498	\$451,945
Residential	\$173,172	\$219,297	\$247,513	\$226,912	\$289,823	\$289,037	\$251,052	\$267,900	\$236,145	\$297,536	\$2,498,387
Other	\$675	\$759	\$3,830	\$1,711	\$625	\$779	\$500	\$1,491	\$3,720	\$4,043	\$18,133
TOTAL	\$1,225,130	\$838,506	\$851,364	\$564,979	\$541,222	\$554,981	\$585,046	\$559,622	\$601,385	\$734,009	\$7,056,244

Annual Percentage Distribution

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	72.0	31.1	40.1	38.9	28.1	28.0	28.9	35.1	34.6	39.0	37.6
Retail	6.1	34.5	8.8	9.2	8.6	9.1	8.0	8.1	12.4	9.8	11.5
Industrial	0.7	2.0	5.7	2.8	1.7	1.4	1.7	1.3	1.1	0.8	1.9
Hotel	2.8	1.6	11.0	3.2	1.9	0.8	0.5	2.9	4.6	4.1	3.3
CIE	4.2	4.5	4.8	5.4	6.1	8.4	18.0	4.4	7.4	5.2	6.8
Residential	14.1	26.2	29.1	40.2	53.5	52.1	42.9	47.9	39.3	40.5	38.6
Other	0.1	0.1	0.4	0.3	0.1	0.1	0.1	0.3	0.6	0.6	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Office	-70.4	30.8	-35.7	-30.9	2.2	8.7	16.4	5.7	37.5	-3.9
Retail	286.1	-74.0	-30.8	-10.5	8.9	-7.7	-3.1	65.0	-3.3	25.6
Industrial	94.1	184.7	-67.3	-42.2	-13.0	26.2	-26.0	-8.3	-14.4	14.9
Hotel	-60.2	590.8	-80.5	-44.7	-56.7	-37.0	486.5	69.4	8.5	97.3
CIE	-26.4	8.0	-25.2	8.6	42.2	124.1	-76.6	80.9	-13.6	13.6
Residential	26.6	12.9	-8.3	27.7	-0.3	-13.1	6.7	-11.9	26.0	7.4
Other	12.4	404.7	-55.3	-63.5	24.6	-35.7	198.0	149.4	8.7	71.5
TOTAL	-31.6	1.5	-33.6	-4.2	2.5	5.4	-4.3	7.5	22.1	-3.9

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.3.C AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 1998-2007

This table presents the average construction cost for all building permits filed for alterations and demolitions by land use category. It represents the total costs (Table 6.1.3.A) divided by the total permits (Table 6.1.3.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average
Office	\$231.2	\$63.4	\$64.4	\$52.5	\$47.9	\$43.4	\$44.3	\$46.9	\$50.4	\$65.7	\$71.0
Retail	\$35.7	\$137.1	\$42.5	\$29.5	\$27.0	\$29.1	\$25.0	\$27.4	\$35.1	\$39.2	\$42.8
Industrial	\$42.6	\$63.6	\$146.7	\$52.3	\$39.9	\$38.9	\$59.9	\$41.4	\$43.8	\$30.8	\$56.0
Hotel	\$200.0	\$79.6	\$382.0	\$96.6	\$55.8	\$22.4	\$15.1	\$112.8	\$143.3	\$118.0	\$122.6
CIE	\$98.1	\$69.0	\$98.7	\$69.7	\$65.1	\$111.3	\$295.8	\$70.1	\$108.4	\$85.9	\$107.2
Residential	\$9.8	\$12.2	\$14.0	\$13.2	\$15.1	\$14.9	\$12.7	\$13.9	\$12.1	\$15.0	\$13.3
Other	\$2.4	\$2.8	\$5.9	\$3.9	\$2.2	\$2.9	\$1.8	\$3.9	\$14.1	\$12.1	\$5.2
TOTAL	\$49.3	\$32.9	\$32.2	\$23.1	\$21.4	\$21.5	\$22.2	\$21.4	\$22.5	\$27.0	\$27.3

Percentage Change

Land Use Category	1998-99	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07
Office	-72.6	1.6	-18.5	-8.7	-9.4	2.1	5.8	7.5	30.4
Retail	283.9	-69.0	-30.6	-8.5	7.9	-14.3	9.8	28.0	11.7
Industrial	49.4	130.7	-64.4	-23.7	-2.4	53.8	-30.9	5.8	-29.7
Hotel	-60.2	380.2	-74.7	-42.2	-59.8	-32.6	645.4	27.0	-17.7
CIE	-29.6	43.0	-29.3	-6.6	70.9	165.8	-76.3	54.5	-20.7
Residential	24.9	14.5	-5.2	13.9	-1.6	-14.4	9.4	-12.9	24.0
Other	18.3	110.5	-35.1	-42.9	32.5	-37.1	114.6	258.1	-14.3
TOTAL	-33.3	-2.2	-28.3	-7.4	0.3	3.3	-3.4	5.0	20.0

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.1.A ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 1998-2007

This table presents the number of building permits filed by Commerce & Industry District (see Chapter 1.2 Data Formats for a definition of Commerce & Industry Districts). All building permits include new construction, alterations, and demolitions. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	600	667	779	1,023	831	765	651	702	702	715
Civic Center	613	780	951	853	738	858	850	801	766	999
Financial	2,990	3,255	4,150	3,301	2,604	2,965	3,363	3,724	3,486	3,733
Mission	1,785	1,800	2,001	1,867	2,127	2,129	2,042	2,004	2,070	1,988
North Beach	753	751	791	714	888	814	788	842	840	803
North Central	3,298	3,315	3,355	2,914	3,581	3,781	3,575	3,602	3,844	4,052
Northwest	2,300	2,291	2,433	2,117	2,285	2,461	2,575	2,477	2,490	2,422
South of Market	2,248	2,482	2,517	2,113	2,053	2,035	2,038	2,116	2,512	2,259
Southwest	9,422	9,199	9,028	8,865	9,574	9,549	9,902	9,372	9,432	9,381
Van Ness	1,012	1,089	1,158	1,086	1,032	1,144	1,140	1,063	1,175	1,509
Unclassified	808	945	268	408	199	150	153	132	89	137
TOTAL	25,829	26,574	27,431	25,261	25,912	26,651	27,077	26,835	27,406	27,998

Annual Percentage Distribution

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	2.3	2.5	2.8	4.0	3.2	2.9	2.4	2.6	2.6	2.6
Civic Center	2.4	2.9	3.5	3.4	2.8	3.2	3.1	3.0	2.8	3.6
Financial	11.6	12.2	15.1	13.1	10.0	11.1	12.4	13.9	12.7	13.3
Mission	6.9	6.8	7.3	7.4	8.2	8.0	7.5	7.5	7.6	7.1
North Beach	2.9	2.8	2.9	2.8	3.4	3.1	2.9	3.1	3.1	2.9
North Central	12.8	12.5	12.2	11.5	13.8	14.2	13.2	13.4	14.0	14.5
Northwest	8.9	8.6	8.9	8.4	8.8	9.2	9.5	9.2	9.1	8.7
South of Market	8.7	9.3	9.2	8.4	7.9	7.6	7.5	7.9	9.2	8.1
Southwest	36.5	34.6	32.9	35.1	36.9	35.8	36.6	34.9	34.4	33.5
Van Ness	3.9	4.1	4.2	4.3	4.0	4.3	4.2	4.0	4.3	5.4
Unclassified	3.1	3.6	1.0	1.6	0.8	0.6	0.6	0.5	0.3	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Bayview	11.2	16.8	31.3	-18.8	-7.9	-14.9	7.8	0.0	1.9	2.7
Civic Center	27.2	21.9	-10.3	-13.5	16.3	-0.9	-5.8	-4.4	30.4	6.1
Financial	8.9	27.5	-20.5	-21.1	13.9	13.4	10.7	-6.4	7.1	3.4
Mission	0.8	11.2	-6.7	13.9	0.1	-4.1	-1.9	3.3	-4.0	1.3
North Beach	-0.3	5.3	-9.7	24.4	-8.3	-3.2	6.9	-0.2	-4.4	1.0
North Central	0.5	1.2	-13.1	22.9	5.6	-5.4	0.8	6.7	5.4	2.4
Northwest	-0.4	6.2	-13.0	7.9	7.7	4.6	-3.8	0.5	-2.7	0.7
South of Market	10.4	1.4	-16.1	-2.8	-0.9	0.1	3.8	18.7	-10.1	0.5
Southwest	-2.4	-1.9	-1.8	8.0	-0.3	3.7	-5.4	0.6	-0.5	0.0
Van Ness	7.6	6.3	-6.2	-5.0	10.9	-0.3	-6.8	10.5	28.4	4.5
Unclassified	17.0	-71.6	52.2	-51.2	-24.6	2.0	-13.7	-32.6	53.9	-6.9
TOTAL	2.9	3.2	-7.9	2.6	2.9	1.6	-0.9	2.1	2.2	0.9

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.2.1.B TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS
BY COMMERCE & INDUSTRY DISTRICT, 1998-2007**

This table presents the total cost of construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	\$26,454	\$45,184	\$139,064	\$39,034	\$22,039	\$24,288	\$26,638	\$68,911	\$31,846	\$59,991
Civic Center	\$78,334	\$37,821	\$77,535	\$91,014	\$76,318	\$51,815	\$44,643	\$37,247	\$70,427	\$46,157
Financial	\$340,034	\$311,004	\$639,353	\$199,284	\$269,136	\$189,814	\$335,011	\$334,856	\$256,927	\$206,042
Mission	\$74,898	\$42,758	\$87,586	\$43,060	\$46,891	\$43,451	\$38,903	\$50,569	\$51,277	\$94,178
North Beach	\$53,882	\$29,259	\$27,976	\$17,654	\$69,510	\$23,739	\$24,274	\$16,853	\$22,985	\$15,062
North Central	\$51,618	\$108,873	\$79,242	\$67,449	\$68,143	\$75,805	\$75,600	\$64,020	\$186,443	\$98,961
Northwest	\$33,316	\$54,345	\$58,529	\$61,017	\$42,026	\$38,631	\$41,461	\$40,921	\$43,595	\$63,908
South of Market	\$946,727	\$397,591	\$523,482	\$223,719	\$252,158	\$136,431	\$164,524	\$385,033	\$262,220	\$276,617
Southwest	\$130,741	\$185,417	\$220,112	\$166,320	\$164,656	\$168,559	\$208,312	\$149,324	\$135,044	\$136,945
Van Ness	\$42,991	\$32,395	\$48,230	\$51,155	\$32,851	\$41,485	\$37,462	\$73,567	\$45,162	\$86,344
Unclassified	\$14,721	\$30,664	\$21,948	\$59,091	\$2,608	\$21,577	\$10,909	\$1,316	\$19,635	\$1,619
TOTAL	\$1,793,717	\$1,275,310	\$1,923,057	\$1,018,798	\$1,046,337	\$815,595	\$1,007,737	\$1,222,617	\$1,125,561	\$1,085,824

Annual Percentage Distribution

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	1.5	3.5	7.2	3.8	2.1	3.0	2.6	5.6	2.8	5.5
Civic Center	4.4	3.0	4.0	8.9	7.3	6.4	4.4	3.0	6.3	4.3
Financial	19.0	24.4	33.2	19.6	25.7	23.3	33.2	27.4	22.8	19.0
Mission	4.2	3.4	4.6	4.2	4.5	5.3	3.9	4.1	4.6	8.7
North Beach	3.0	2.3	1.5	1.7	6.6	2.9	2.4	1.4	2.0	1.4
North Central	2.9	8.5	4.1	6.6	6.5	9.3	7.5	5.2	16.6	9.1
Northwest	1.9	4.3	3.0	6.0	4.0	4.7	4.1	3.3	3.9	5.9
South of Market	52.8	31.2	27.2	22.0	24.1	16.7	16.3	31.5	23.3	25.5
Southwest	7.3	14.5	11.4	16.3	15.7	20.7	20.7	12.2	12.0	12.6
Van Ness	2.4	2.5	2.5	5.0	3.1	5.1	3.7	6.0	4.0	8.0
Unclassified	0.8	2.4	1.1	5.8	0.2	2.6	1.1	0.1	1.7	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Bayview	70.8	207.8	-71.9	-43.5	10.2	9.7	158.7	-53.8	88.4	37.6
Civic Center	-51.7	105.0	17.4	-16.1	-32.1	-13.8	-16.6	89.1	-34.5	4.7
Financial	-8.5	105.6	-68.8	35.1	-29.5	76.5	-0.0	-23.3	-19.8	6.7
Mission	-42.9	104.8	-50.8	8.9	-7.3	-10.5	30.0	1.4	83.7	5.0
North Beach	-45.7	-4.4	-36.9	293.7	-65.8	2.3	-30.6	36.4	-34.5	11.5
North Central	110.9	-27.2	-14.9	1.0	11.2	-0.3	-15.3	191.2	-46.9	21.0
Northwest	63.1	7.7	4.3	-31.1	-8.1	7.3	-1.3	6.5	46.6	9.5
South of Market	-58.0	31.7	-57.3	12.7	-45.9	20.6	134.0	-31.9	5.5	1.1
Southwest	41.8	18.7	-24.4	-1.0	2.4	23.6	-28.3	-9.6	1.4	2.5
Van Ness	-24.6	48.9	6.1	-35.8	26.3	-9.7	96.4	-38.6	91.2	16.0
Unclassified	108.3	-28.4	169.2	-95.6	727.4	-49.4	-87.9	1392.2	-91.8	204.4
TOTAL	-28.9	50.8	-47.0	2.7	-22.1	23.6	21.3	-7.9	-3.5	-1.1

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.2.1.C AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS
BY COMMERCE & INDUSTRY DISTRICT, 1998-2007**

This table presents the average construction cost for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.1.A) divided by the total permits (Table 6.2.1.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	\$44.1	\$67.7	\$178.5	\$38.2	\$26.5	\$31.7	\$40.9	\$98.2	\$45.4	\$83.9
Civic Center	\$127.8	\$48.5	\$81.5	\$106.7	\$103.4	\$60.4	\$52.5	\$46.5	\$91.9	\$46.2
Financial	\$113.7	\$95.5	\$154.1	\$60.4	\$103.4	\$64.0	\$99.6	\$89.9	\$73.7	\$55.2
Mission	\$42.0	\$23.8	\$43.8	\$23.1	\$22.0	\$20.4	\$19.1	\$25.2	\$24.8	\$47.4
North Beach	\$71.6	\$39.0	\$35.4	\$24.7	\$78.3	\$29.2	\$30.8	\$20.0	\$27.4	\$18.8
North Central	\$15.7	\$32.8	\$23.6	\$23.1	\$19.0	\$20.0	\$21.1	\$17.8	\$48.5	\$24.4
Northwest	\$14.5	\$23.7	\$24.1	\$28.8	\$18.4	\$15.7	\$16.1	\$16.5	\$17.5	\$26.4
South of Market	\$421.1	\$160.2	\$208.0	\$105.9	\$122.8	\$67.0	\$80.7	\$182.0	\$104.4	\$122.5
Southwest	\$13.9	\$20.2	\$24.4	\$18.8	\$17.2	\$17.7	\$21.0	\$15.9	\$14.3	\$14.6
Van Ness	\$42.5	\$29.7	\$41.6	\$47.1	\$31.8	\$36.3	\$32.9	\$69.2	\$38.4	\$57.2
Unclassified	\$18.2	\$32.4	\$81.9	\$144.8	\$13.1	\$143.8	\$71.3	\$10.0	\$220.6	\$11.8
Citywide Average	\$69.4	\$48.0	\$70.1	\$40.3	\$40.4	\$30.6	\$37.2	\$45.6	\$41.1	\$38.8

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2001- 02	2003-04	2004-05	2005-06	2006-07
Bayview	53.6	163.5	-78.6	-30.5	19.7	28.9	139.9	-53.8	85.0
Civic Center	-62.1	68.1	30.9	-3.1	-41.6	-13.0	-11.5	97.7	-49.7
Financial	-16.0	61.2	-60.8	71.2	-38.1	55.6	-9.7	-18.0	-25.1
Mission	-43.4	84.3	-47.3	-4.4	-7.4	-6.7	32.5	-1.8	91.2
North Beach	-45.6	-9.2	-30.1	216.6	-62.7	5.6	-35.0	36.7	-31.5
North Central	109.8	-28.1	-2.0	-17.8	5.4	5.5	-16.0	172.9	-49.6
Northwest	63.8	1.4	19.8	-36.2	-14.7	2.6	2.6	6.0	50.7
South of Market	-62.0	29.8	-49.1	16.0	-45.4	20.4	125.4	-42.6	17.3
Southwest	45.3	21.0	-23.0	-8.3	2.6	19.2	-24.3	-10.1	2.0
Van Ness	-30.0	40.0	13.1	-32.4	13.9	-9.4	110.6	-44.5	48.9
Unclassified	78.1	152.4	76.8	-91.0	997.7	-50.4	-86.0	2,113.1	-94.6
Citywide Average	-30.9	46.1	-42.5	0.1	-24.2	21.6	22.4	-9.9	-5.6

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.2.2.A BUILDING PERMITS FOR NEW CONSTRUCTION
BY COMMERCE & INDUSTRY DISTRICT, 1998-2007**

This table presents the number of building permits filed for new construction by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	28	44	40	38	30	8	23	34	27	15
Civic Center	5	3	8	4	7	4	4	4	3	2
Financial	11	4	19	5	1	3	6	9	6	6
Mission	69	38	50	21	26	33	22	30	28	31
North Beach	14	4	6	3	23	6	5	4	1	0
North Central	23	61	23	20	13	17	16	41	23	18
Northwest	29	54	33	31	17	16	8	10	16	12
South of Market	100	71	79	36	25	39	31	38	31	21
Southwest	155	194	154	147	115	109	101	86	74	67
Van Ness	9	9	12	6	4	8	6	23	11	11
Unclassified	4	3	6	2	4	45	3	5	10	5
TOTAL	447	485	430	313	265	288	225	284	230	188

Annual Percentage Distribution

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	6.3	9.1	9.3	12.1	11.3	2.8	10.2	12.0	11.7	8.0
Civic Center	1.1	0.6	1.9	1.3	2.6	1.4	1.8	1.4	1.3	1.1
Financial	2.5	0.8	4.4	1.6	0.4	1.0	2.7	3.2	2.6	3.2
Mission	15.4	7.8	11.6	6.7	9.8	11.5	9.8	10.6	12.2	16.5
North Beach	3.1	0.8	1.4	1.0	8.7	2.1	2.2	1.4	0.4	0.0
North Central	5.1	12.6	5.3	6.4	4.9	5.9	7.1	14.4	10.0	9.6
Northwest	6.5	11.1	7.7	9.9	6.4	5.6	3.6	3.5	7.0	6.4
South of Market	22.4	14.6	18.4	11.5	9.4	13.5	13.8	13.4	13.5	11.2
Southwest	34.7	40.0	35.8	47.0	43.4	37.8	44.9	30.3	32.2	35.6
Van Ness	2.0	1.9	2.8	1.9	1.5	2.8	2.7	8.1	4.8	5.9
Unclassified	0.9	0.6	1.4	0.6	1.5	15.6	1.3	1.8	4.3	2.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Bayview	57.1	-9.1	-5.0	-21.1	-73.3	187.5	47.8	-20.6	-44.4	11.9
Civic Center	-40.0	166.7	-50.0	75.0	-42.9	0.0	0.0	-25.0	-33.3	5.0
Financial	-63.6	375.0	-73.7	-80.0	200.0	100.0	50.0	-33.3	0.0	47.4
Mission	-44.9	31.6	-58.0	23.8	26.9	-33.3	36.4	-6.7	10.7	-1.4
North Beach	-71.4	50.0	-50.0	666.7	-73.9	-16.7	-20.0	-75.0	-100.0	31.0
North Central	165.2	-62.3	-13.0	-35.0	30.8	-5.9	156.3	-43.9	-21.7	17.0
Northwest	86.2	-38.9	-6.1	-45.2	-5.9	-50.0	25.0	60.0	-25.0	0.0
South of Market	-29.0	11.3	-54.4	-30.6	56.0	-20.5	22.6	-18.4	-32.3	-9.5
Southwest	25.2	-20.6	-4.5	-21.8	-5.2	-7.3	-14.9	-14.0	-9.5	-7.3
Van Ness	0.0	33.3	-50.0	-33.3	100.0	-25.0	283.3	-52.2	0.0	25.6
Unclassified	-25.0	100.0	-66.7	100.0	1025.0	-93.3	66.7	100.0	-50.0	115.7
TOTAL	8.5	-11.3	-27.2	-15.3	8.7	-21.9	26.2	-19.0	-18.3	-7.0

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1998-2007

This table presents the total cost of new construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	\$20,118	\$33,003	\$111,560	\$25,716	\$7,908	\$8,488	\$12,786	\$57,640	\$8,256	\$29,012
Civic Center	\$13,187	\$4,734	\$14,173	\$41,941	\$50,685	\$13,011	\$6,579	\$16,590	\$36,173	\$797
Financial	\$138,372	\$79,800	\$305,853	\$35,501	\$106,337	\$21,546	\$192,254	\$151,456	\$105,078	\$37,556
Mission	\$57,842	\$19,003	\$35,149	\$11,632	\$19,940	\$18,060	\$18,335	\$25,690	\$31,414	\$61,184
North Beach	\$31,344	\$12,894	\$5,567	\$1,054	\$50,840	\$3,456	\$3,882	\$2,260	\$457	\$0
North Central	\$8,614	\$57,420	\$15,852	\$8,862	\$12,182	\$22,068	\$27,971	\$6,065	\$111,152	\$20,638
Northwest	\$8,452	\$23,634	\$18,486	\$28,988	\$5,297	\$7,299	\$3,675	\$6,550	\$4,165	\$30,990
South of Market	\$211,302	\$111,307	\$399,808	\$144,524	\$185,276	\$66,333	\$94,819	\$313,439	\$159,029	\$91,418
Southwest	\$51,098	\$67,576	\$126,396	\$71,340	\$55,350	\$59,611	\$33,341	\$26,144	\$26,366	\$22,409
Van Ness	\$22,863	\$5,694	\$15,917	\$21,781	\$8,325	\$22,021	\$13,106	\$53,606	\$10,277	\$46,826
Unclassified	\$847	\$15,919	\$16,507	\$51,762	\$471	\$16,100	\$8,377	\$665	\$17,651	\$594
TOTAL	\$564,037	\$430,985	\$1,065,268	\$443,100	\$502,611	\$257,995	\$415,126	\$660,105	\$510,018	\$341,423

Annual Percentage Distribution

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	3.6	7.7	10.5	5.8	1.6	3.3	3.1	8.7	1.6	8.5
Civic Center	2.3	1.1	1.3	9.5	10.1	5.0	1.6	2.5	7.1	0.2
Financial	24.5	18.5	28.7	8.0	21.2	8.4	46.3	22.9	20.6	11.0
Mission	10.3	4.4	3.3	2.6	4.0	7.0	4.4	3.9	6.2	17.9
North Beach	5.6	3.0	0.5	0.2	10.1	1.3	0.9	0.3	0.1	0.0
North Central	1.5	13.3	1.5	2.0	2.4	8.6	6.7	0.9	21.8	6.0
Northwest	1.5	5.5	1.7	6.5	1.1	2.8	0.9	1.0	0.8	9.1
South of Market	37.5	25.8	37.5	32.6	36.9	25.7	22.8	47.5	31.2	26.8
Southwest	9.1	15.7	11.9	16.1	11.0	23.1	8.0	4.0	5.2	6.6
Van Ness	4.1	1.3	1.5	4.9	1.7	8.5	3.2	8.1	2.0	13.7
Unclassified	0.2	3.7	1.5	11.7	0.1	6.2	2.0	0.1	3.5	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Bayview	64.0	238.0	-76.9	-69.2	7.3	50.6	350.8	-85.7	251.4	73.0
Civic Center	-64.1	199.4	195.9	20.8	-74.3	-49.4	152.2	118.0	-97.8	40.1
Financial	-42.3	283.3	-88.4	199.5	-79.7	792.3	-21.2	-30.6	-64.3	94.9
Mission	-67.1	85.0	-66.9	71.4	-9.4	1.5	40.1	22.3	94.8	17.2
North Beach	-58.9	-56.8	-81.1	4725.7	-93.2	12.3	-41.8	-79.8	-100.0	422.6
North Central	566.6	-72.4	-44.1	37.5	81.2	26.7	-78.3	1732.7	-81.4	216.8
Northwest	179.6	-21.8	56.8	-81.7	37.8	-49.6	78.2	-36.4	644.1	80.7
South of Market	-47.3	259.2	-63.9	28.2	-64.2	42.9	230.6	-49.3	-42.5	29.4
Southwest	32.2	87.0	-43.6	-22.4	7.7	-44.1	-21.6	0.8	-15.0	-1.9
Van Ness	-75.1	179.5	36.8	-61.8	164.5	-40.5	309.0	-80.8	355.6	78.7
Unclassified	1779.7	3.7	213.6	-99.1	3318.8	-48.0	-92.1	2555.8	-96.6	753.6
TOTAL	-23.6	147.2	-58.4	13.4	-48.7	60.9	59.0	-22.7	-33.1	9.4

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.2.2.C AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1998-2007

This table presents the average cost of new construction for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.2.A) divided by the total permits (Table 6.2.2.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	\$718.5	\$750.1	\$2,789.0	\$676.7	\$263.6	\$1,061.0	\$555.9	\$1,695.3	\$305.8	\$1,934.1
Civic Center	\$2,637.3	\$1,578.0	\$1,771.6	\$10,485.1	\$7,240.7	\$3,252.7	\$1,644.8	\$4,147.5	\$12,057.7	\$398.6
Financial	\$12,579.3	\$19,950.0	\$16,097.5	\$7,100.2	\$106,337.1	\$7,181.9	\$32,042.3	\$16,828.4	\$17,513.0	\$6,259.4
Mission	\$838.3	\$500.1	\$703.0	\$553.9	\$766.9	\$547.3	\$833.4	\$856.3	\$1,121.9	\$1,973.7
North Beach	\$2,238.8	\$3,223.5	\$927.8	\$351.2	\$2,210.4	\$576.1	\$776.3	\$564.9	\$457.0	-
North Central	\$374.5	\$941.3	\$689.2	\$443.1	\$937.1	\$1,298.1	\$1,748.2	\$147.9	\$4,832.7	\$1,146.5
Northwest	\$291.4	\$437.7	\$560.2	\$935.1	\$311.6	\$456.2	\$459.4	\$655.0	\$260.3	\$2,582.5
South of Market	\$2,113.0	\$1,567.7	\$5,060.9	\$4,014.5	\$7,411.0	\$1,700.9	\$3,058.7	\$8,248.4	\$5,130.0	\$4,353.2
Southwest	\$329.7	\$348.3	\$820.8	\$485.3	\$481.3	\$546.9	\$330.1	\$304.0	\$356.3	\$334.5
Van Ness	\$2,540.4	\$632.7	\$1,326.4	\$3,630.2	\$2,081.2	\$2,752.7	\$2,184.4	\$2,330.7	\$934.3	\$4,256.9
Unclassified	\$211.7	\$5,306.4	\$2,751.2	\$25,880.8	\$117.7	\$357.8	\$2,792.4	\$132.9	\$1,765.1	\$118.7
Citywide Average	\$1,261.8	\$888.6	\$2,477.4	\$1,415.7	\$1,896.6	\$895.8	\$1,845.0	\$2,324.3	\$2,217.5	\$1,816.1

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2001- 02	2003-04	2004-05	2005-06	2006-07
Bayview	4.4	271.8	-75.7	-61.0	302.5	-47.6	204.9	-82.0	532.5
Civic Center	-40.2	12.3	491.9	-30.9	-55.1	-49.4	152.2	190.7	-96.7
Financial	58.6	-19.3	-55.9	1,397.7	-93.2	346.2	-47.5	4.1	-64.3
Mission	-40.3	40.6	-21.2	38.5	-28.6	52.3	2.8	31.0	75.9
North Beach	44.0	-71.2	-62.2	529.4	-73.9	34.8	-27.2	-19.1	-
North Central	151.3	-26.8	-35.7	111.5	38.5	34.7	-91.5	3,167.0	-76.3
Northwest	50.2	28.0	66.9	-66.7	46.4	0.7	42.6	-60.3	892.1
South of Market	-25.8	222.8	-20.7	84.6	-77.0	79.8	169.7	-37.8	-15.1
Southwest	5.7	135.6	-40.9	-0.8	13.6	-39.6	-7.9	17.2	-6.1
Van Ness	-75.1	109.7	173.7	-42.7	32.3	-20.6	6.7	-59.9	355.6
Unclassified	2,406.3	-48.2	840.7	-99.5	203.9	680.5	-95.2	1,227.9	-93.3
Citywide Average	-29.6	178.8	-42.9	34.0	-52.8	106.0	26.0	-4.6	-18.1

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.2.3.A BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS
BY COMMERCE & INDUSTRY DISTRICT, 1998-2007**

This table presents the number of building permits filed for alterations and demolitions by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	554	605	719	956	788	748	617	656	655	691
Civic Center	577	726	919	819	701	814	819	764	736	956
Financial	2,874	3,148	4,015	3,198	2,526	2,886	3,267	3,629	3,419	3,629
Mission	1,703	1,737	1,923	1,820	2,087	2,062	2,003	1,954	2,025	1,929
North Beach	721	721	743	688	841	774	757	829	823	789
North Central	3,221	3,206	3,285	2,853	3,537	3,703	3,515	3,510	3,780	3,965
Northwest	2,253	2,214	2,360	2,065	2,254	2,400	2,550	2,453	2,443	2,357
South of Market	2,053	2,259	2,332	1,981	1,951	1,917	1,923	2,000	2,367	2,102
Southwest	9,165	8,918	8,788	8,642	9,420	9,355	9,717	9,214	9,285	9,206
Van Ness	966	1,044	1,103	1,054	1,008	1,109	1,095	1,025	1,152	1,467
Unclassified	751	897	250	385	195	96	140	117	70	124
TOTAL	24,838	25,475	26,437	24,461	25,308	25,864	26,403	26,151	26,755	27,215

Annual Percentage Distribution

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	2.2	2.4	2.7	3.9	3.1	2.9	2.3	2.5	2.4	2.5
Civic Center	2.3	2.8	3.5	3.3	2.8	3.1	3.1	2.9	2.8	3.5
Financial	11.6	12.4	15.2	13.1	10.0	11.2	12.4	13.9	12.8	13.3
Mission	6.9	6.8	7.3	7.4	8.2	8.0	7.6	7.5	7.6	7.1
North Beach	2.9	2.8	2.8	2.8	3.3	3.0	2.9	3.2	3.1	2.9
North Central	13.0	12.6	12.4	11.7	14.0	14.3	13.3	13.4	14.1	14.6
Northwest	9.1	8.7	8.9	8.4	8.9	9.3	9.7	9.4	9.1	8.7
South of Market	8.3	8.9	8.8	8.1	7.7	7.4	7.3	7.6	8.8	7.7
Southwest	36.9	35.0	33.2	35.3	37.2	36.2	36.8	35.2	34.7	33.8
Van Ness	3.9	4.1	4.2	4.3	4.0	4.3	4.1	3.9	4.3	5.4
Unclassified	3.0	3.5	0.9	1.6	0.8	0.4	0.5	0.4	0.3	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Bayview	9.2	18.8	33.0	-17.6	-5.1	-17.5	6.3	-0.2	5.5	3.3
Civic Center	25.8	26.6	-10.9	-14.4	16.1	0.6	-6.7	-3.7	29.9	6.3
Financial	9.5	27.5	-20.3	-21.0	14.3	13.2	11.1	-5.8	6.1	3.5
Mission	2.0	10.7	-5.4	14.7	-1.2	-2.9	-2.4	3.6	-4.7	1.4
North Beach	0.0	3.1	-7.4	22.2	-8.0	-2.2	9.5	-0.7	-4.1	1.2
North Central	-0.5	2.5	-13.2	24.0	4.7	-5.1	-0.1	7.7	4.9	2.5
Northwest	-1.7	6.6	-12.5	9.2	6.5	6.3	-3.8	-0.4	-3.5	0.7
South of Market	10.0	3.2	-15.1	-1.5	-1.7	0.3	4.0	18.4	-11.2	0.6
Southwest	-2.7	-1.5	-1.7	9.0	-0.7	3.9	-5.2	0.8	-0.9	0.1
Van Ness	8.1	5.7	-4.4	-4.4	10.0	-1.3	-6.4	12.4	27.3	4.7
Unclassified	19.4	-72.1	54.0	-49.4	-50.8	45.8	-16.4	-40.2	77.1	-3.2
TOTAL	2.6	3.8	-7.5	3.5	2.2	2.1	-1.0	2.3	1.7	1.0

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.2.3.B TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS
BY COMMERCE & INDUSTRY DISTRICT, 1998-2007**

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	\$6,308	\$12,011	\$27,301	\$12,591	\$13,980	\$15,632	\$8,229	\$11,028	\$13,149	\$30,918
Civic Center	\$65,046	\$32,980	\$63,235	\$49,009	\$25,538	\$38,673	\$37,850	\$20,561	\$34,178	\$45,171
Financial	\$199,346	\$230,939	\$331,635	\$163,343	\$162,336	\$167,946	\$142,264	\$183,126	\$150,994	\$164,015
Mission	\$17,004	\$23,550	\$52,392	\$31,229	\$26,920	\$35,088	\$20,537	\$24,845	\$19,813	\$32,950
North Beach	\$22,501	\$16,322	\$22,116	\$16,531	\$18,593	\$20,206	\$20,329	\$14,581	\$22,484	\$14,920
North Central	\$42,493	\$51,157	\$62,977	\$58,463	\$55,893	\$53,492	\$27,507	\$57,844	\$75,214	\$78,197
Northwest	\$24,818	\$30,384	\$39,555	\$31,668	\$36,688	\$31,010	\$37,720	\$34,349	\$39,336	\$32,785
South of Market	\$734,697	\$283,454	\$121,360	\$76,097	\$65,617	\$69,516	\$69,449	\$70,364	\$102,406	\$182,266
Southwest	\$79,176	\$117,249	\$93,473	\$94,626	\$109,024	\$108,678	\$174,384	\$122,371	\$108,289	\$114,082
Van Ness	\$19,987	\$26,637	\$31,914	\$29,325	\$24,495	\$19,396	\$24,278	\$19,934	\$33,590	\$37,697
Unclassified	\$13,753	\$13,822	\$5,407	\$2,097	\$2,137	\$5,345	\$2,499	\$620	\$1,933	\$1,009
TOTAL	\$1,225,130	\$838,506	\$851,364	\$564,979	\$541,222	\$564,981	\$565,046	\$559,622	\$601,385	\$734,009

Annual Percentage Distribution

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	0.5	1.4	3.2	2.2	2.6	2.8	1.5	2.0	2.2	4.2
Civic Center	5.3	3.9	7.4	8.7	4.7	6.8	6.7	3.7	5.7	6.2
Financial	16.3	27.5	39.0	28.9	30.0	29.7	25.2	32.7	25.1	22.3
Mission	1.4	2.8	6.2	5.5	5.0	6.2	3.6	4.4	3.3	4.5
North Beach	1.8	1.9	2.6	2.9	3.4	3.6	3.6	2.6	3.7	2.0
North Central	3.5	6.1	7.4	10.3	10.3	9.5	4.9	10.3	12.5	10.7
Northwest	2.0	3.6	4.6	5.6	6.8	5.5	6.7	6.1	6.5	4.5
South of Market	60.0	33.8	14.3	13.5	12.1	12.3	12.3	12.6	17.0	24.8
Southwest	6.5	14.0	11.0	16.7	20.1	19.2	30.9	21.9	18.0	15.5
Van Ness	1.6	3.2	3.7	5.2	4.5	3.4	4.3	3.6	5.6	5.1
Unclassified	1.1	1.6	0.6	0.4	0.4	0.9	0.4	0.1	0.3	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	Average
Bayview	90.4	127.3	-53.9	11.0	11.8	-47.4	34.0	19.2	135.1	32.8
Civic Center	-49.3	91.7	-22.5	-47.9	51.4	-2.1	-45.7	66.2	32.2	7.4
Financial	15.8	43.6	-50.7	-0.6	3.5	-15.3	28.7	-17.5	8.6	1.6
Mission	38.5	122.5	-40.4	-13.8	30.3	-41.5	21.0	-20.3	66.3	16.3
North Beach	-27.5	35.5	-25.3	12.5	8.7	0.6	-28.3	54.2	-33.6	-0.3
North Central	20.4	23.1	-7.2	-4.4	-4.3	-48.6	110.3	30.0	4.0	12.3
Northwest	22.4	30.2	-19.9	15.9	-15.5	21.6	-8.9	14.5	-16.7	4.4
South of Market	-61.4	-57.2	-37.3	-13.8	5.9	-0.1	1.3	45.5	78.0	-3.9
Southwest	48.1	-20.3	1.2	15.2	-0.3	60.5	-29.8	-11.5	5.3	6.8
Van Ness	33.3	19.8	-8.1	-16.5	-20.8	25.2	-17.9	68.5	12.2	9.6
Unclassified	0.5	-60.9	-61.2	1.9	150.1	-53.2	-75.2	211.8	-47.8	6.6
TOTAL	-31.6	1.5	-33.6	-4.2	4.4	0.0	-1.0	7.5	22.1	-3.5

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.2.3.C AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS
BY COMMERCE & INDUSTRY DISTRICT, 1998-2007**

This table presents the average construction cost for all building permits filed for alterations and demolitions by Commerce & Industry District. It represents the total costs (Table 6.2.3.A) divided by the total permits (Table 6.2.3.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bayview	\$11.4	\$19.9	\$38.0	\$13.2	\$17.7	\$20.9	\$13.3	\$16.8	\$20.1	\$44.7
Civic Center	\$112.7	\$45.4	\$68.8	\$59.8	\$36.4	\$47.5	\$46.2	\$26.9	\$46.4	\$47.2
Financial	\$69.4	\$73.4	\$82.6	\$51.1	\$64.3	\$58.2	\$43.5	\$50.5	\$44.2	\$45.2
Mission	\$10.0	\$13.6	\$27.2	\$17.2	\$12.9	\$17.0	\$10.3	\$12.7	\$9.8	\$17.1
North Beach	\$31.2	\$22.6	\$29.8	\$24.0	\$22.1	\$26.1	\$26.9	\$17.6	\$27.3	\$18.9
North Central	\$13.2	\$16.0	\$19.2	\$20.5	\$15.8	\$14.4	\$7.8	\$16.5	\$19.9	\$19.7
Northwest	\$11.0	\$13.7	\$16.8	\$15.3	\$16.3	\$12.9	\$14.8	\$14.0	\$16.1	\$13.9
South of Market	\$357.9	\$125.5	\$52.0	\$38.4	\$33.6	\$36.3	\$36.1	\$35.2	\$43.3	\$86.7
Southwest	\$8.6	\$13.1	\$10.6	\$10.9	\$11.6	\$11.6	\$17.9	\$13.3	\$11.7	\$12.4
Van Ness	\$20.7	\$25.5	\$28.9	\$27.8	\$24.3	\$17.5	\$22.2	\$19.4	\$29.2	\$25.7
Unclassified	\$18.3	\$15.4	\$21.6	\$5.4	\$11.0	\$55.7	\$17.9	\$5.3	\$27.6	\$8.1
Citywide Average	\$49.3	\$32.9	\$32.2	\$23.1	\$21.4	\$21.8	\$21.4	\$21.4	\$22.5	\$27.0

Percentage Change

C&I District	1998-99	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07
Bayview	74.4	91.3	-65.3	34.7	17.8	-36.2	26.0	19.4	122.9
Civic Center	-59.7	51.5	-13.0	-39.1	30.4	-2.7	-41.8	72.6	1.7
Financial	5.8	12.6	-38.2	25.8	-9.4	-25.2	15.9	-12.5	2.3
Mission	35.8	101.0	-37.0	-24.8	31.9	-39.7	24.0	-23.1	74.6
North Beach	-27.5	31.5	-19.3	-8.0	18.1	2.9	-34.5	55.3	-30.8
North Central	21.0	20.1	6.9	-22.9	-8.6	-45.8	110.6	20.7	-0.9
Northwest	24.6	22.1	-8.5	6.1	-20.6	14.5	-5.3	15.0	-13.6
South of Market	-64.9	-58.5	-26.2	-12.4	7.8	-0.4	-2.6	23.0	100.4
Southwest	52.2	-19.1	2.9	5.7	0.4	54.5	-26.0	-12.2	6.3
Van Ness	23.3	13.4	-3.8	-12.7	-28.0	26.8	-12.3	49.9	-11.9
Unclassified	-15.9	40.4	-74.8	101.2	408.1	-67.9	-70.3	421.1	-70.5
Citywide Average	-33.3	-2.2	-28.3	-7.4	2.1	-2.0	-0.0	5.0	20.0

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.3.A PERMIT APPLICATIONS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2007

This table presents the permit applications for 2007 by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry

Number of Permits

C&I District	Office	Retail	Industrial	Hotel	CIE	Residential	Other	TOTAL
Bayview	36	28	49	0	15	568	19	715
Civic Center	242	132	1	88	35	450	51	999
Financial	2,922	306	5	45	34	293	128	3,733
Mission	65	125	14	16	22	1,696	50	1,988
North Beach	65	94	2	18	14	583	27	803
North Central	116	247	9	5	91	3,471	113	4,052
Northwest	68	110	1	1	50	2,119	73	2,422
South of Market	612	385	83	49	57	906	167	2,259
Southwest	137	294	27	2	105	8,616	200	9,381
Van Ness	92	123	6	28	33	1,176	51	1,509
Unclassified	11	8	1	1	3	61	52	137
TOTAL	4,366	1,852	198	253	459	19,939	931	27,998

Percentage Distribution by C&I District

C&I District	Office	Retail	Industrial	Hotel	CIE	Residential	Other	TOTAL
Bayview	0.8	1.5	24.7	0.0	3.3	2.8	2.0	2.6
Civic Center	5.5	7.1	0.5	34.8	7.6	2.3	5.5	3.6
Financial	66.9	16.5	2.5	17.8	7.4	1.5	13.7	13.3
Mission	1.5	6.7	7.1	6.3	4.8	8.5	5.4	7.1
North Beach	1.5	5.1	1.0	7.1	3.1	2.9	2.9	2.9
North Central	2.7	13.3	4.5	2.0	19.8	17.4	12.1	14.5
Northwest	1.6	5.9	0.5	0.4	10.9	10.6	7.8	8.7
South of Market	14.0	20.8	41.9	19.4	12.4	4.5	17.9	8.1
Southwest	3.1	15.9	13.6	0.8	22.9	43.2	21.5	33.5
Van Ness	2.1	6.6	3.0	11.1	7.2	5.9	5.5	5.4
Unclassified	0.3	0.4	0.5	0.4	0.7	0.3	5.6	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	Industrial	Hotel	CIE	Residential	Other	TOTAL
Bayview	5.0	3.9	6.9	0.0	2.1	79.4	2.7	100.0
Civic Center	24.2	13.2	0.1	8.8	3.5	45.0	5.1	100.0
Financial	78.3	8.2	0.1	1.2	0.9	7.8	3.4	100.0
Mission	3.3	6.3	0.7	0.8	1.1	85.3	2.5	100.0
North Beach	8.1	11.7	0.2	2.2	1.7	72.6	3.4	100.0
North Central	2.9	6.1	0.2	0.1	2.2	85.7	2.8	100.0
Northwest	2.8	4.5	0.0	0.0	2.1	87.5	3.0	100.0
South of Market	27.1	17.0	3.7	2.2	2.5	40.1	7.4	100.0
Southwest	1.5	3.1	0.3	0.0	1.1	91.8	2.1	100.0
Van Ness	6.1	8.2	0.4	1.9	2.2	77.9	3.4	100.0
Unclassified	8.0	5.8	0.7	0.7	2.2	44.5	38.0	100.0
TOTAL	15.6	6.6	0.7	0.9	1.6	71.2	3.3	100.0

Note: CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.3.B TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2007

This table presents the total construction cost for all permit applications for 2007 by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Total Construction Costs (2007 \$ 000s)

C&I District	Office	Retail	Industrial	Hotel	CIE	Residential	Other	TOTAL
Bayview	\$3,739	\$3,825	\$32,336	\$0	\$3,497	\$83,708	\$809	\$127,914
Civic Center	\$35,881	\$18,679	\$55	\$10,917	\$1,620	\$30,726	\$538	\$98,417
Financial	\$360,663	\$26,056	\$256	\$10,230	\$3,991	\$27,014	\$11,117	\$439,326
Mission	\$70,980	\$48,897	\$179	\$908	\$6,059	\$73,270	\$515	\$200,809
North Beach	\$5,443	\$3,709	\$30	\$3,933	\$402	\$18,202	\$396	\$32,114
North Central	\$10,127	\$16,872	\$100	\$103	\$35,007	\$148,237	\$559	\$211,006
Northwest	\$5,803	\$4,371	\$15	\$0	\$3,038	\$122,611	\$429	\$136,266
South of Market	\$286,709	\$53,579	\$8,437	\$11,340	\$14,351	\$208,640	\$6,751	\$589,807
Southwest	\$15,451	\$17,191	\$1,397	\$750	\$30,051	\$222,634	\$4,522	\$291,997
Van Ness	\$11,884	\$7,360	\$783	\$25,464	\$3,161	\$130,465	\$4,989	\$184,105
Unclassified	\$137	\$599	\$13	\$0	\$101	\$2,175	\$427	\$3,452
TOTAL	\$806,816	\$201,138	\$43,601	\$63,646	\$101,277	\$1,067,682	\$31,053	\$2,315,214

Annual Percentage Distribution by C&I District

C&I District	Office	Retail	Industrial	Hotel	CIE	Residential	Other	TOTAL
Bayview	0.5	1.9	74.2	0.0	3.5	7.8	2.6	5.5
Civic Center	4.4	9.3	0.1	17.2	1.6	2.9	1.7	4.3
Financial	44.7	13.0	0.6	16.1	3.9	2.5	35.8	19.0
Mission	8.8	24.3	0.4	1.4	6.0	6.9	1.7	8.7
North Beach	0.7	1.8	0.1	6.2	0.4	1.7	1.3	1.4
North Central	1.3	8.4	0.2	0.2	34.6	13.9	1.8	9.1
Northwest	0.7	2.2	0.0	0.0	3.0	11.5	1.4	5.9
South of Market	35.5	26.6	19.4	17.8	14.2	19.5	21.7	25.5
Southwest	1.9	8.5	3.2	1.2	29.7	20.9	14.6	12.6
Van Ness	1.5	3.7	1.8	40.0	3.1	12.2	16.1	8.0
Unclassified	0.0	0.3	0.0	0.0	0.1	0.2	1.4	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Annual Percentage Distribution by Land Use Category

C&I District	Office	Retail	Industrial	Hotel	CIE	Residential	Other	TOTAL
Bayview	2.9	3.0	25.3	0.0	2.7	65.4	0.6	100.0
Civic Center	36.5	19.0	0.1	11.1	1.6	31.2	0.5	100.0
Financial	82.1	5.9	0.1	2.3	0.9	6.1	2.5	100.0
Mission	35.3	24.4	0.1	0.5	3.0	36.5	0.3	100.0
North Beach	16.9	11.5	0.1	12.2	1.3	56.7	1.2	100.0
North Central	4.8	8.0	0.0	0.0	16.6	70.3	0.3	100.0
Northwest	4.3	3.2	0.0	0.0	2.2	90.0	0.3	100.0
South of Market	48.6	9.1	1.4	1.9	2.4	35.4	1.1	100.0
Southwest	5.3	5.9	0.5	0.3	10.3	76.2	1.5	100.0
Van Ness	6.5	4.0	0.4	13.8	1.7	70.9	2.7	100.0
Unclassified	4.0	17.4	0.4	0.0	2.9	63.0	12.4	100.0
TOTAL	34.8	8.7	1.9	2.7	4.4	46.1	1.3	100.0

Note: CIE = Cultural/Institutional/Educational

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.3.C AVERAGE CONSTRUCTION COSTS FOR ALL PERMITS
BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2007**

This table presents the average construction cost for all permit applications for 2007 by both Commerce & Industry District and Land Use Category. It represents the total costs (Table 6.3.A) divided by the total permits (Table 6.3.B).

Average Construction Costs (2007 \$ 000s)

C&I District	Office	Retail	Industrial	Hotel	CIE	Residential	Other	Average
Bayview	\$103.9	\$136.6	\$659.9	-	\$233.1	\$147.4	\$42.6	\$220.6
Civic Center	\$148.3	\$141.5	\$55.0	\$124.1	\$46.3	\$68.3	\$10.6	\$84.9
Financial	\$123.4	\$85.2	\$51.1	\$227.3	\$117.4	\$92.2	\$86.9	\$111.9
Mission	\$1,092.0	\$391.2	\$12.8	\$56.8	\$275.4	\$43.2	\$10.3	\$268.8
North Beach	\$83.7	\$39.5	\$15.0	\$218.5	\$28.7	\$31.2	\$14.7	\$61.6
North Central	\$87.3	\$68.3	\$11.2	\$20.6	\$384.7	\$42.7	\$4.9	\$88.5
Northwest	\$85.3	\$39.7	\$14.8	\$0.0	\$60.8	\$57.9	\$5.9	\$37.8
South of Market	\$468.5	\$139.2	\$101.7	\$231.4	\$251.8	\$230.3	\$40.4	\$209.0
Southwest	\$112.8	\$58.5	\$51.8	\$375.0	\$286.2	\$25.8	\$22.6	\$133.2
Van Ness	\$129.2	\$59.8	\$130.5	\$909.4	\$95.8	\$110.9	\$97.8	\$219.1
Unclassified	\$12.4	\$74.9	\$13.0	\$0.0	\$33.6	\$35.7	\$8.2	\$25.4
Citywide Average	\$184.8	\$108.6	\$220.2	\$251.6	\$220.6	\$53.5	\$33.4	\$153.2

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.A ALL BUILDING PERMITS BY LAND USE CATEGORY AND PERMIT STATUS, 2007

This table presents the status of building permits by Land Use Category. Also included is the percentage distribution by Land Use Category and by permit status.

Number of Permits

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	7	1	2,800	1,449	109	4,366
Retail	10	2	897	830	113	1,852
Industrial	0	0	84	100	14	198
Hotel	2	1	71	170	9	253
CIE	3	0	197	224	35	459
Residential	90	15	11,115	7,893	823	19,936
Other	12	1	200	471	247	931
TOTAL	124	20	15,364	11,137	1,350	27,995

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	5.6	5.0	18.2	13.0	8.1	15.6
Retail	8.1	10.0	5.8	7.5	8.4	6.6
Industrial	0.0	0.0	0.5	0.9	1.0	0.7
Hotel	1.6	5.0	0.5	1.5	0.7	0.9
CIE	2.4	0.0	1.3	2.0	2.6	1.6
Residential	72.6	75.0	72.3	70.9	61.0	71.2
Other	9.7	5.0	1.3	4.2	18.3	3.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.2	0.0	64.1	33.2	2.5	100.0
Retail	0.5	0.1	48.4	44.8	6.1	100.0
Industrial	0.0	0.0	42.4	50.5	7.1	100.0
Hotel	0.8	0.4	28.1	67.2	3.6	100.0
CIE	0.7	0.0	42.9	48.8	7.6	100.0
Residential	0.5	0.1	55.8	39.6	4.1	100.0
Other	1.3	0.1	21.5	50.6	26.5	100.0
TOTAL	0.4	0.1	54.9	39.8	4.8	100.0

Note:

- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.B TOTAL CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2007

This table presents the construction cost of building permits by Land Use Category and by permit status. Also included is the percentage distribution by Land Use Category and by permit status.

Total Construction Costs (2007 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$1,088	\$85	\$282,136	\$339,892	\$183,614	\$806,816
Retail	\$437	\$450	\$56,833	\$121,057	\$22,361	\$201,138
Industrial	\$0	\$0	\$3,997	\$6,618	\$32,986	\$43,601
Hotel	\$146	\$450	\$6,396	\$52,848	\$3,806	\$63,646
CIE	\$2,680	\$0	\$12,865	\$67,345	\$18,388	\$101,277
Residential	\$58,433	\$1,990	\$183,360	\$506,433	\$317,456	\$1,067,672
Other	\$1	\$0	\$3,263	\$18,421	\$9,368	\$31,053
TOTAL	\$62,784	\$2,975	\$548,850	\$1,112,615	\$587,979	\$2,315,203

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	1.7	2.9	51.4	30.5	31.2	34.8
Retail	0.7	15.1	10.4	10.9	3.8	8.7
Industrial	0.0	0.0	0.7	0.6	5.6	1.9
Hotel	0.2	15.1	1.2	4.7	0.6	2.7
CIE	4.3	0.0	2.3	6.1	3.1	4.4
Residential	93.1	66.9	33.4	45.5	54.0	46.1
Other	0.0	0.0	0.6	1.7	1.6	1.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.1	0.0	35.0	42.1	22.8	100.0
Retail	0.2	0.2	28.3	60.2	11.1	100.0
Industrial	0.0	0.0	9.2	15.2	75.7	100.0
Hotel	0.2	0.7	10.0	83.0	6.0	100.0
CIE	2.6	0.0	12.7	66.5	18.2	100.0
Residential	5.5	0.2	17.2	47.4	29.7	100.0
Other	0.0	0.0	10.5	59.3	30.2	100.0
TOTAL	2.7	0.1	23.7	48.1	25.4	100.0

Note:

- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.C AVERAGE CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2007

This table presents the average construction cost for all permit applications for 2007 by both Land Use Category and permit status. It represents the total costs (Table 6.4.1.A) divided by the total permits (Table 6.4.1.B).

Average Construction Costs (2007 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$155.4	\$85.0	\$100.8	\$234.6	\$1,684.5	\$184.8
Retail	\$43.7	\$225.0	\$63.4	\$145.9	\$197.9	\$108.6
Industrial	-	-	\$47.6	\$66.2	\$2,356.1	\$220.2
Hotel	\$73.0	\$450.0	\$90.1	\$310.9	\$422.8	\$251.6
CIE	\$893.3	-	\$65.3	\$300.6	\$525.4	\$220.6
Residential	\$649.3	\$132.6	\$16.5	\$64.2	\$385.7	\$53.6
Other	\$0.0	\$0.0	\$16.3	\$39.1	\$37.9	\$33.4
TOTAL	\$506.3	\$148.7	\$35.7	\$99.9	\$435.5	\$82.7

Note:

- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.2.A BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2007

This table presents the status of building permits by Commerce & Industry District. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Number of Permits

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	3	0	351	321	40	715
Civic Center	2	1	503	447	46	999
Financial	5	2	2,372	1,253	101	3,733
Mission	22	2	981	861	121	1,987
North Beach	1	3	406	349	44	803
North Central	16	2	2,238	1,604	192	4,052
Northwest	5	3	1,375	923	116	2,422
South of Market	12	1	1,070	1,031	145	2,259
Southwest	50	6	5,286	3,691	346	9,379
Van Ness	8	0	776	647	78	1,509
Unclassified	0	0	6	10	121	137
TOTAL	124	20	15,364	11,137	1,350	27,995

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	2.4	0.0	2.3	2.9	3.0	2.6
Civic Center	1.6	5.0	3.3	4.0	3.4	3.6
Financial	4.0	10.0	15.4	11.3	7.5	13.3
Mission	17.7	10.0	6.4	7.7	9.0	7.1
North Beach	0.8	15.0	2.6	3.1	3.3	2.9
North Central	12.9	10.0	14.6	14.4	14.2	14.5
Northwest	4.0	15.0	8.9	8.3	8.6	8.7
South of Market	9.7	5.0	7.0	9.3	10.7	8.1
Southwest	40.3	30.0	34.4	33.1	25.6	33.5
Van Ness	6.5	0.0	5.1	5.8	5.8	5.4
Unclassified	0.0	0.0	0.0	0.1	9.0	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	0.4	0.0	49.1	44.9	5.6	100.0
Civic Center	0.2	0.1	50.4	44.7	4.6	100.0
Financial	0.1	0.1	63.5	33.6	2.7	100.0
Mission	1.1	0.1	49.4	43.3	6.1	100.0
North Beach	0.1	0.4	50.6	43.5	5.5	100.0
North Central	0.4	0.0	55.2	39.6	4.7	100.0
Northwest	0.2	0.1	56.8	38.1	4.8	100.0
South of Market	0.5	0.0	47.4	45.6	6.4	100.0
Southwest	0.5	0.1	56.4	39.4	3.7	100.0
Van Ness	0.5	0.0	51.4	42.9	5.2	100.0
Unclassified	0.0	0.0	4.4	7.3	88.3	100.0
TOTAL	0.4	0.1	54.9	39.8	4.8	100.0

Note:

- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.2.B TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2007

This table presents the construction cost of building permits by Commerce & Industry District and by permit status. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Total Construction Costs (2007 \$ 000s)

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	2,900	0	19,515	68,631	36,868	\$127,914
Civic Center	5	75	21,044	70,313	6,980	\$98,417
Financial	1,178	460	224,497	114,776	98,415	\$439,326
Mission	4,754	459	15,720	147,663	32,211	\$200,807
North Beach	150	39	8,805	18,643	4,479	\$32,114
North Central	7,712	510	51,622	110,921	40,241	\$211,006
Northwest	648	550	24,597	86,725	23,747	\$136,266
South of Market	35,930	500	71,234	300,404	181,740	\$589,807
Southwest	8,940	383	84,821	141,608	56,238	\$291,989
Van Ness	568	0	26,871	52,848	103,818	\$184,105
Unclassified	0	0	125	84	3,243	\$3,452
TOTAL	\$62,784	\$2,975	\$548,850	\$1,112,615	\$587,979	\$2,315,203

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	4.6	0.0	3.6	6.2	6.3	5.5
Civic Center	0.0	2.5	3.8	6.3	1.2	4.3
Financial	1.9	15.5	40.9	10.3	16.7	19.0
Mission	7.6	15.4	2.9	13.3	5.5	8.7
North Beach	0.2	1.3	1.6	1.7	0.8	1.4
North Central	12.3	17.1	9.4	10.0	6.8	9.1
Northwest	1.0	18.5	4.5	7.8	4.0	5.9
South of Market	57.2	16.8	13.0	27.0	30.9	25.5
Southwest	14.2	12.9	15.5	12.7	9.6	12.6
Van Ness	0.9	0.0	4.9	4.7	17.7	8.0
Unclassified	0.0	0.0	0.0	0.0	0.6	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	2.3	0.0	15.3	53.7	28.8	100.0
Civic Center	0.0	0.1	21.4	71.4	7.1	100.0
Financial	0.3	0.1	51.1	26.1	22.4	100.0
Mission	2.4	0.2	7.8	73.5	16.0	100.0
North Beach	0.5	0.1	27.4	58.1	13.9	100.0
North Central	3.7	0.2	24.5	52.6	19.1	100.0
Northwest	0.5	0.4	18.1	63.6	17.4	100.0
South of Market	6.1	0.1	12.1	50.9	30.8	100.0
Southwest	3.1	0.1	29.0	48.5	19.3	100.0
Van Ness	0.3	0.0	14.6	28.7	56.4	100.0
Unclassified	0.0	0.0	3.6	2.4	93.9	100.0
TOTAL	2.7	0.1	23.7	48.1	25.4	100.0

Note:

- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.2.C AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2007

This table presents the average construction cost for all permit applications for 2007 by both Commerce & Industry District and permit status. It represents the total costs (Table 6.4.1.A) divided by the total permits (Table 6.4.1.B).

Average Construction Costs (2007 \$ 000s)

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	\$966.7	-	\$55.6	\$213.8	\$921.7	\$178.9
Civic Center	\$2.6	\$75.0	\$41.8	\$157.3	\$151.7	\$98.5
Financial	\$235.7	\$230.0	\$94.6	\$91.6	\$974.4	\$117.7
Mission	\$216.1	\$229.3	\$16.0	\$171.5	\$266.2	\$101.1
North Beach	\$150.0	\$12.8	\$21.7	\$53.4	\$101.8	\$40.0
North Central	\$482.0	\$255.0	\$23.1	\$69.2	\$209.6	\$52.1
Northwest	\$129.6	\$183.3	\$17.9	\$94.0	\$204.7	\$56.3
South of Market	\$2,994.1	\$500.0	\$66.6	\$291.4	\$1,253.4	\$261.1
Southwest	\$178.8	\$63.8	\$16.0	\$38.4	\$162.5	\$31.1
Van Ness	\$71.0	-	\$34.6	\$81.7	\$1,331.0	\$122.0
Unclassified	-	-	\$20.8	\$8.4	\$26.8	\$25.2
TOTAL	\$506.3	\$148.7	\$35.7	\$99.9	\$435.5	\$82.7

Note:

- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.5 TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 1998-2007

This table presents the total existing office space in the central and non-central business districts from 1998-2007. It also conveys the percent change by year. This information is presented graphically in Figure 6.5.

Building Square Footage (000s)

Location	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Central Business District	42,032	42,727	44,326	43,904	45,663	48,192	48,198	46,719	46,956	47,026
Non-Central Business District	19,392	21,171	21,941	22,137	24,968	22,622	22,686	22,845	22,932	22,996
TOTAL	61,424	63,899	66,267	66,041	70,631	70,814	70,884	69,564	69,888	70,022

Percentage Change

Location	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Central Business District	1.7	3.7	-1.0	4.0	5.5	0.0	-3.1	0.5	0.1
Non-Central Business District	9.2	3.6	0.9	12.8	-9.4	0.3	0.7	0.4	0.3
TOTAL	4.0	3.7	-0.3	7.0	0.3	0.1	-1.9	0.5	0.2

Note:

- Office Space includes large commercial buildings of 25,000 rentable square feet or larger in the Central and Non-Central Business Districts, which are defined below. Not included are government, medical, and owner occupied buildings.
- The Central Business District includes the Financial District areas both north and south of Market Street.
- The Non-Central Business District includes Jackson Square, North Waterfront, Yerba Buena, South of Market, West of Kearny, West of Van Ness Corridor, Van Ness, and Union Square.

Sources:

- Cushman & Wakefield of California Research Services
- San Francisco Planning Department

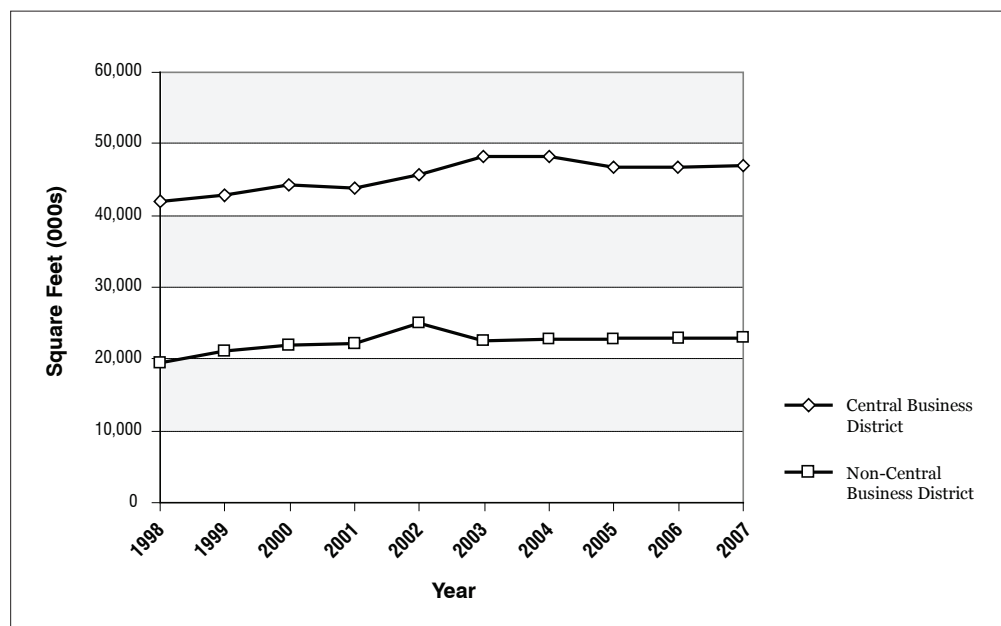
FIGURE 6.5 TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 1998-2007

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2007 (CONTINUED)

Plan Area	Residential	Mixed Resid	Office	Retail	Industrial	CIE	Hotel	Mixed Uses	Public/ OS	Vacant	Other	TOTAL
Balboa	3.7	2.8	0.2	20.5	0.5	7.9	0.0	1.7	15.6	47.0	0.0	100.0
Bayview	24.1	1.3	2.8	2.1	24.9	14.6	0.0	1.3	10.8	17.8	0.2	100.0
C-3	1.9	5.7	39.0	12.7	4.0	4.6	8.4	15.8	2.6	4.7	0.6	100.0
Central Waterfront	2.0	2.1	3.3	1.8	52.2	0.2	0.0	1.5	18.8	18.2	0.0	100.0
East Soma	10.1	19.7	14.1	5.6	17.1	1.0	0.6	8.5	7.8	15.3	0.2	100.0
Geary	64.9	3.6	0.9	7.4	1.0	12.7	0.8	2.4	3.7	2.5	0.0	100.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	0.3	0.0	0.0	88.4	0.0	11.3	0.0	100.0
Market/Octavia	42.8	9.6	7.9	7.1	3.8	11.1	0.5	3.6	4.8	9.0	0.0	100.0
Mid-Market	1.8	11.2	27.4	9.5	6.1	4.8	5.4	10.6	2.4	18.9	1.9	100.0
Mission	47.3	9.6	2.5	7.8	12.2	6.8	0.1	4.8	2.6	6.3	0.0	100.0
Mission Bay	14.8	15.2	0.0	3.0	2.6	1.5	0.0	0.4	2.0	56.0	4.5	100.0
Port	0.0	0.0	1.5	0.6	16.5	0.0	0.0	0.0	69.9	11.5	0.0	100.0
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	100.0
Rest of the City	52.7	6.0	0.6	1.9	0.3	5.5	0.3	0.6	24.4	4.5	3.2	100.0
Rincon Hill	17.5	17.7	30.4	8.6	1.8	4.6	0.0	2.5	0.0	16.9	0.0	100.0
Showplace Sq/Potrero Hill	38.5	2.3	4.1	5.1	13.3	10.9	0.0	4.4	3.5	17.0	0.9	100.0
Transbay	1.6	0.9	32.0	8.5	12.7	0.3	0.0	1.3	0.0	42.5	0.2	100.0
Van Ness	23.3	18.0	6.9	13.6	9.9	7.3	6.7	11.2	0.0	3.2	0.0	100.0
Visitation Valley	68.8	1.9	0.1	0.8	9.9	2.5	0.0	0.1	5.0	10.0	0.9	100.0
West Soma	10.7	7.7	11.2	11.6	29.8	2.5	0.6	9.1	0.1	16.6	0.2	100.0
Yerba Buena	1.6	8.4	9.4	15.9	0.3	8.4	8.8	5.8	15.0	26.3	0.0	100.0
TOTAL	40.5	5.0	1.7	2.5	4.7	5.6	0.3	4.2	25.9	7.4	2.1	100.0

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TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2007 (CONTINUED)

Percentage Distribution by Land Use Category												
Plan Area	Residential	Mixed Resid	Office	Retail	Industrial	CIE	Hotel	Mixed Uses	Public/ OS	Vacant	Other	TOTAL
Balboa	0.1	0.4	0.1	6.2	0.1	1.1	0.0	0.3	0.5	4.7	0.0	0.7
Bayview	4.3	1.9	11.6	5.9	38.1	18.7	0.6	2.3	3.0	17.1	0.7	7.1
C-3	0.0	1.0	19.7	4.4	0.7	0.7	22.3	3.3	0.1	0.5	0.2	0.9
Central Waterfront	0.1	0.7	3.5	1.2	19.7	0.1	0.0	0.7	1.3	4.3	0.0	1.8
East Soma	0.2	3.4	7.3	2.0	3.2	0.2	1.5	1.8	0.3	1.8	0.1	0.9
Geary	3.1	1.4	1.0	5.7	0.4	4.4	4.9	1.1	0.3	0.6	0.0	1.9
Hunters Point Shipyard	0.0	0.0	0.0	0.0	0.2	0.0	0.0	72.0	0.0	5.1	0.0	3.4
Market/Octavia	1.2	2.2	5.3	3.3	0.9	2.3	1.7	1.0	0.2	1.4	0.0	1.1
Mid-Market	0.0	0.5	3.5	0.8	0.3	0.2	3.7	0.6	0.0	0.6	0.2	0.2
Mission	2.8	4.5	3.5	7.5	6.2	2.9	0.9	2.7	0.2	2.0	0.0	2.4
Mission Bay	0.4	3.3	0.0	1.3	0.6	0.3	0.0	0.1	0.1	8.3	2.3	1.1
Port	0.0	0.0	2.7	0.8	11.1	0.0	0.0	0.0	8.5	4.8	0.0	3.1
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	24.5	0.0	0.0	6.3
Rest of the City	83.6	76.1	23.6	48.7	4.0	63.8	51.1	9.0	60.6	38.7	95.1	64.2
Rincon Hill	0.1	0.5	2.5	0.5	0.1	0.1	0.0	0.1	0.0	0.3	0.0	0.1
Showplace Sq/Potrero Hill	1.8	0.9	4.6	3.9	5.4	3.7	0.0	2.1	0.3	4.4	0.8	1.9
Transbay	0.0	0.0	3.1	0.6	0.4	0.0	0.0	0.0	0.0	0.9	0.0	0.2
Van Ness	0.2	1.0	1.2	1.6	0.6	0.4	6.0	0.8	0.0	0.1	0.0	0.3
Visitation Valley	2.0	0.4	0.1	0.4	2.5	0.5	0.0	0.0	0.2	1.5	0.5	1.2
West Soma	0.2	1.3	5.6	3.9	5.4	0.4	1.6	1.9	0.0	1.9	0.1	0.8
Yerba Buena	0.0	0.4	1.2	1.4	0.0	0.3	5.7	0.3	0.1	0.8	0.0	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Note:

- Public/OS = Public and Open Space

Sources:

- San Francisco Office of the Assessor-Recorder
- San Francisco Planning Department
- Dun & Bradstreet



**Planning Department Plan Areas
San Francisco 2007**

0 Miles 1
MAP 6.1

7.0 TRANSPORTATION

The primary purpose of this chapter on transportation is to systematically track and publish information on transportation trends in San Francisco. While there are a number of ways of measuring trends in urban mobility in this city, for consistency, this chapter presents much of the same type of transportation data collected as part of the *Downtown Plan Monitoring Report*. The *Downtown Plan Monitoring Report* is an assessment of the effectiveness of the *Downtown Plan*, prepared every five years as mandated in Chapter 10E of the San Francisco Administrative Code. This chapter tracks changes in transportation trends and provides recent data in the following areas:

- Mode split;
- Parking entitlements;
- Vehicle occupancy;
- Transit service; and
- Transit Impact Development Fee (TIDF) revenues.

The transportation data presented in this chapter come from a number of government agency sources, primarily the Planning Department and divisions of the Metropolitan Transportation Agency (MTA), but also the American Community Survey, a service of the U.S. Census Bureau. For the purposes of this chapter, data are reported on an annual or biennial basis, either as part of a larger series of thematic reports or as a stand-alone set of data specifically compiled for this inventory report.

7.1 MODE SPLIT

Daily commuters access San Francisco through a number of different transportation modes, including single occupant vehicle (or drive alone); carpool or vanpool; public transit; walking; bicycle; and other modes (e.g., motorcycles, taxicabs). In addition, an increasing number of commuters regularly work at home at least one day a week.

Local trends in commute mode share over the past five years are contained in Table 7.1, below. Data is provided for both San Francisco residents working in all locations (residents), as well as San Francisco employees either residing in San Francisco County or another county in the region (employees). This data includes mode splits for 2000, 2002, 2004 and 2006; however, data for employees was available only for 2004 and 2006. No information was available for 2007.

- *Table 7.1 Mode Split for Commuters* — Less than 50% of San Francisco's residents and workers drive alone to work. Substantial increases in walking and bicycling to work, and a slight increase in transit use occurred between 2004 and 2006. Working from home dipped slightly in 2006 for the first time since 2000.

7.2 PARKING ENTITLEMENTS

Studies have shown that the volume and nature of travel is influenced by the availability and price of parking. Where parking is cheap and available, employees tend to drive to work, rather than seek other alternatives. However, where parking is more expensive and alternatives are available, commuters tend to use alternative modes some of the time.

For the purposes of this chapter, annual parking entitlements were generated from the Planning Department database. This data reflects the number of off-street parking spaces approved by the city as part of the permit approval process. On an annual basis, new data on parking entitlements will be provided in this section.

The parking entitlement data are included in Table 7.2. The total number of projects and corresponding parking spaces for calendar years 2004 through 2007 are listed by zoning district.

- *Table 7.2 Parking Entitlements, 2004-2007* — Parking entitlements, similar to building permits, tend to fluctuate greatly based on large projects. In 2007, parking spaces in projects decreased 62% over those in 2006. The number of projects with parking was down 27%. Close to half of the 2007 parking spaces were in C-2 (Community Business) districts with another 23% in downtown zoning districts.

7.3 VEHICLE OCCUPANCY

This indicator measures the average number of individuals per private vehicle during critical periods of the day, when traffic congestion is at its highest (e.g., peak commute periods). The primary source for local vehicle occupancy rates is the 2006 American Community Survey (ACS) undertaken by the U.S. Bureau of the Census.

This survey estimated the number of individuals commuting to work and their principal modes of travel: drive alone, carpool, public transit, bicycle, walk and other. In order to compute the average vehicle occupancy, the ACS takes the number of commuters arriving by private vehicle (drive alone or carpool/vanpool) and divides by the number of private vehicles. No data was available for calendar year 2007.

The data is presented in Table 7.3.

- *Table 7.3 Private Vehicle Occupancy in San Francisco, 2000-2006* — Private vehicle occupancy rates dipped 7.5% in 2006 after staying relatively constant from 2000 to 2004.

7.4 TRANSIT SERVICE LEVELS

Levels of transit service are commonly expressed in terms of transit ridership along a specific line or in specific service areas. In this case, MUNI, the transit operating division of the MTA, provides periodic ridership volumes for all of its lines. These data, covering average daily volumes during Fiscal Years 2004-05 and 2006-2007, are reported in Table 7.4. This table provides ridership data for all of MUNI's existing transit routes throughout the city, including trolley and motorcoach bus service as well as light rail service.

- *Table 7.4 Transit Ridership on MUNI Lines* — While the overall ridership is down 2.6% between 2005 and 2007, MTA believes the 2007 numbers are more accurate, because a number of transit vehicles have been equipped with automated passenger counters. In 2007, the two busiest transit lines were the 38-Geary and the N-Judah with 56,473 and 40,500 riders respectively. In addition, the 2007 ridership was up on these two lines: the N-Judah increasing by 14.2% and the 38-Geary line by 10.5%.

7.5 TIDF REVENUES

The MTA Finance Division assembles data on the volume of revenue collected from the Transit Impact Development Fee (TIDF). These fees, which are collected from building applicants just prior to the issuance of a certificate of occupancy, are subsequently deposited into an account for use by the MTA. Historically, data have indicated wide variations in the volume of revenues collected each year, depending on the number and size of projects approved.

The TIDF has been in effect in San Francisco since 1981, although litigation prevented collection of this fee until three years later. Originally, the TIDF was developed to offset the increased marginal operating and capital costs incurred by MUNI in the late 1970s, during the boom in office development. In response to increasing transit demand, this new fee was designed to provide expanded peak period transit service to downtown MUNI routes. While the appli-

cation of this fee was originally limited to all new and converted office space in downtown San Francisco, in 2004, City legislation expanded its application to most non-residential uses throughout the City.

Annual revenues from the TIDF are shown in Table 7.5. They have been inflation adjusted to 2007 dollars.

- *Table 7.5 TIDF Revenues Collected (Inflation-Adjusted)* — TIDF revenues have fluctuated greatly over the years depending on the number and sizes of projects subject to the transit impact development fee. In Fiscal Year 2005-06, revenues reached an all-time high, with over \$11 million collected. The 2007 revenues dropped by 83% from those collected in fiscal year 2006. This decrease can be attributed to fewer large projects during the 2006-2007 fiscal period.

TABLE 7.1 MODE SPLIT FOR COMMUTERS, 2000-2006

Table 7.1 presents the most recent mode split data for San Francisco's residents and employees. It is shown in terms of the percentages of all trips.

Mode	Residents				Employees	
	2000	2002	2004	2006	2004	2006
Drive Alone	41.0	42.4	42.3	40.5	38.8	37.7
Carpool/Vanpool	9.3	8.7	8.7	7.7	11.9	10.5
Transit	32.2	30.8	29.6	30.3	34.9	35.8
Walk	6.5	8.0	8.2	9.6	5.9	6.9
Bicycle	1.8	2.1	1.8	2.3	1.6	1.5
Work at Home	4.8	6.5	7.7	7.6	5.3	5.4
Other	4.4	1.5	1.7	2.0	2.0	2.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Source:
 • US Census American Community Survey, 2000, 2002 and 2004, 2006

TABLE 7.2 PARKING ENTITLEMENTS, 2004-2007

Table 7.2 presents the most recent data on parking entitlements in San Francisco.

Zoning District	2004		2005		2006		2007	
	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces
C-2			1	21			1	620
C-3	2	243	5	730	12	2,368	2	296
C-M							1	40
DTR					2	616		
M-1	3	368	3	468				
M-2	2	186	1	35	1	163		
NC-1							2	24
NC-2							1	24
NC-3	2	21	1	48	3	189	2	100
NCD	1	12	2	42	2	18	1	37
P	1	25						
RC-4	1	2	7	626			1	35
RH-1	1	4					1	1
RH-2	1	216	2	3				
RH-3	1	1	1	3				
RM-1	1	4					1	7
RM-3	1	1					1	39
RM-4			2	367				
RSD	1	40	1	14				
SLI	2	13						
SLR	1	20	1	42	1	11	2	58
SSO	1	35			1	44		
TOTAL	22	1,191	27	2,399	27	2,399	16	1,281

Note:

- "C" refers to commercial districts
- "DTR" refers to downtown residential districts
- "M" refers to industrial districts
- "NC" and named areas refer to neighborhood commercial districts
- "P" refers to the public district
- "R" refers to residential districts
- "S" refers to support activity districts

Source:

San Francisco Planning Department

TABLE 7.3 PRIVATE VEHICLE OCCUPANCY IN SAN FRANCISCO, 2000-2006

Table 7.3 presents data on private vehicle occupancy rates in San Francisco. It describes the average number of people per trip in San Francisco.

Population	2000	2002	2004	2006
San Francisco Residents	1.22	1.20	1.20	1.11
San Francisco Residents	N/A	N/A	N/A	N/A

Sources:
US Census American
Community Survey, 2000,
2002, 2004, 2006

TABLE 7.4 TRANSIT RIDERSHIP ON MUNI LINES

Table 7.4 presents data on average daily ridership on MUNI lines for 2005 and 2007.

Daily Ridership by Route

Route Nos.	Route Name	2005	2007	Ridership Difference	Percentage Change
1, 1AX, 1BX	California	29,896	26,108	-3,788	-12.7%
2	Clement	5,635	7,113	1,478	26.2%
3	Jackson	3,649	4,216	567	15.5%
4	Sutter	3,942	1,697	-2,245	-57.0%
5	Fulton	13,184	14,039	855	6.5%
6	Parnassus	6,610	7,158	548	8.3%
7	Haight	5,863	1,693	-4,170	-71.1%
9, 9AX, 9BX, 9X	San Bruno	28,645	32,197	3,552	12.4%
10	Townsend	3,056	3,155	99	3.2%
12	Folsom	7,376	6,928	-448	-6.1%
14, 14L, 14X	Mission	47,147	40,500	-6,647	-14.1%
15	Third Street	30,440	29,524	-916	-3.0%
16AX, 16BX	Noriega Express	1643	1822	179	10.9%
17	Parkmerced	1,510	1,348	-162	-10.7%
18	46th Avenue	3,578	3,414	-164	-4.6%
19	Polk	10,395	9,232	-1,163	-11.2%
21	Hayes	12,279	8,749	-3,530	-28.7%
22	Fillmore	22,806	18,892	-3,914	-17.2%
23	Monterey	4,529	4,421	-108	-2.4%
24	Divisadero	11,355	10,717	-638	-5.6%
26	Valencia	4,245	2,944	-1,301	-30.6%
27	Bryant	9,157	7,415	-1,742	-19.0%
28	19th Avenue	9,924	9,689	-235	-2.4%
29	Sunset	16,596	14,961	-1,635	-9.9%
30, 30X	Stockton	31,186	26,160	-5,026	-16.1%
31, 31AX, 31BX	Balboa	10,280	10,705	425	4.1%
33	Stanyan	6,167	5,536	-631	-10.2%
35	Eureka	737	734	-3	-0.4%
36	Teresita	1,015	1,762	747	73.6%
37	Corbett	1,421	1,789	368	25.9%
38, 38L, 38AX, 38BX	Geary	51,124	56,473	5,349	10.5%
39	Coit	404	390	-14	-3.5%
41	Union	3,345	3,060	-285	-8.5%
43	Masonic	14,264	12,765	-1,499	-10.5%
44	O'Shaughnessy	13,275	12,872	-403	-3.0%

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TABLE 7.4 TRANSIT RIDERSHIP ON MUNI LINES (CONTINUED)

Daily Ridership by Route

Route Nos.	Route Name	2005	2007	Ridership Difference	Percentage Change
45	Union–Stockton	15,994	12,660	-3,334	-20.8%
47	Van Ness	16,529	12,792	-3,737	-22.6%
48	Quintara–24th Street	9,660	9,270	-390	-4.0%
49	Van Ness–Mission	26,206	25,266	-940	-3.6%
52	Excelsior	3,082	2,387	-695	-22.6%
53	Southern Heights	1,146	961	-185	-16.1%
54	Felton	5,707	8,288	2,581	45.2%
56	Rutland	205	218	13	6.3%
66	Quintara	774	772	-2	-0.3%
67	Bernal Heights	2,242	2,441	199	8.9%
71, 71L	Haight–Noriega	11,515	12,419	904	7.9%
80X	Gateway Express	N/A	132	132	-
81X	Caltrain Express	N/A	125	125	-
82X	Levi Plaza	307	268	-39	-12.7%
88	BART Shuttle	732	832	100	13.7%
89	Laguna Honda	179	179	0	0.0%
90	Owl	N/A	353	353	-
91	Owl	N/A	648	648	-
108	Treasure Island	1,958	3,372	1,414	72.2%
F	Market	14,139	18,520	4,381	31.0%
J	Church	20,018	16,695	-3,323	-16.6%
K	Ingleside	18,263	18,444	181	1.0%
L	Taraval	28,607	29,842	1,235	4.3%
M	Ocean View	24,681	28,671	3,990	16.2%
N	Judah	39,632	45,252	5,620	14.2%
TOTAL		668,254	650,985	-17,269	-2.6%

Source: San Francisco Municipal Transportation Agency

TABLE 7.5 TRANSIT IMPACT DEVELOPMENT FEE (TIDF) REVENUE COLLECTED
(INFLATION-ADJUSTED), FISCAL YEARS 2002-2007

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2001-2002, inflation adjusted to reflect costs in 2007.

Fiscal Year	Fee Structure	Collections (2006 \$)
2001 - 2002	1981 Ordinance	\$8,739,841
2002 - 2003	1981 Ordinance	\$4,381,581
2003 - 2004	2004 Ordinance	\$1,449,712
2004 - 2005	2004 Ordinance	\$984,591
2005 - 2006	2004 Ordinance	\$11,526,316
2006 - 2007	2004 Ordinance	\$1,980,198

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