

# SAN FRANCISCO COMMERCE & INDUSTRY INVENTORY





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**SAN FRANCISCO**  
**COMMERCE & INDUSTRY**  
**INVENTORY**

**2009**

San Francisco Planning Department  
October 2009





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# FINDINGS

## FROM THE 2009 COMMERCE & INDUSTRY INVENTORY

### SAN FRANCISCO ECONOMY IN 2008: HOLDING STEADY

#### Employment Continues Recovery

In 2008, there were almost 571,000 jobs in San Francisco, an increase of about 14,400 jobs or 2.6% 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 6.2% from the high of 608,270 jobs in 2000 (see Figure 1). Office, Retail, and Cultural/ Institutional/ Educational (CIE), and Hotel sectors also gained jobs in 2008, while the Production/Distribution/ Repair (PDR) sector posted a slight loss (see Table 3.1).

#### Office Employment Up

For the fourth year in a row, the number of office workers grew, showing an increase of 3.1% in 2008. Office is the largest employment sector, representing 38.8% of the workforce in San Francisco. The addition of some 6,590 new jobs in 2008 brings this sector's total jobs to 221,250 (see Figure 2). However, this is still almost 9% below the 2000 high of 243,290. Within the office sector, Public Administration and Office Services gained more than 7,750 workers, while Finance and Insurance jobs decreased. The distribution of other office sub-sector jobs largely remained the same (see Table 3.2.1). The number of office establishments increased by 1% from 2007

FIGURE 1 EMPLOYMENT IN SAN FRANCISCO FROM 1999-2008

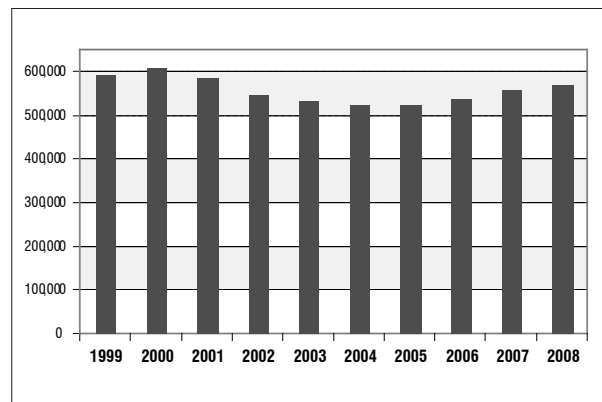
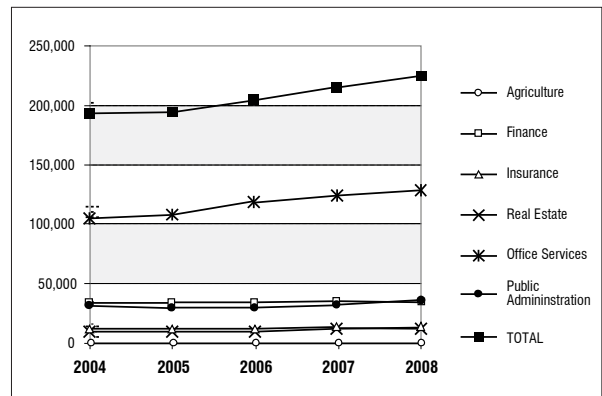


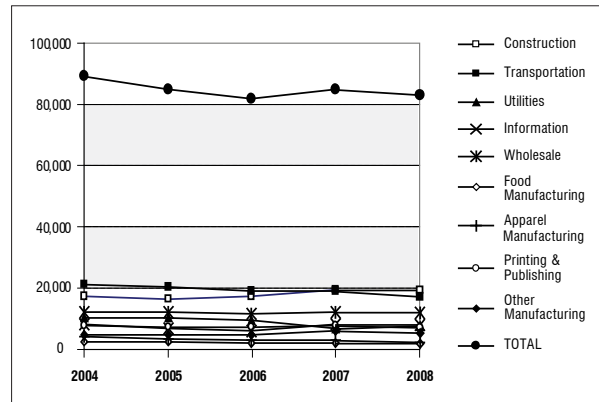
FIGURE 2 OFFICE EMPLOYMENT FROM 2004-2008



### Production, Distribution and Repair Jobs Decline Slightly

The number of Production, Distribution, and Repair (PDR) workers decreased in 2008. However, the decline was minimal – only 275 workers or -0.3% (see Figure 3). This sector, with some 84,710 workers, makes up 14.8% of the total workforce. The PDR sector, in decline in the last decade, has exhibited a 9.6% drop in employment from 2004. Still, in 2008, the Utilities sub-sector of PDR employment showed an 11% gain. The number of PDR establishments decreased 0.8% to just over 4,840 (see Tables 3.2.3 and 4.2.3).

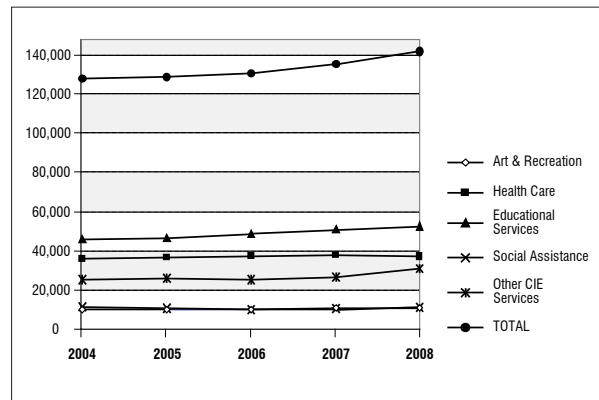
FIGURE 3 PDR EMPLOYMENT FROM 2004-2008



### 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 141,850 workers. For the sixth straight year, there has been steady growth in CIE jobs, including a 4.8% increase since 2007 and an 10.8% increase since 2004 (see Figure 4). In 2008, every sub-sector of CIE employment grew, with the exception of Art and Recreation and Health Care which were both down slightly. CIE has the most number of establishments among all sectors – over 24,890 – largely driven by the number of small day care establishments and home-based businesses (see Tables 3.2.4 and 4.2.4).

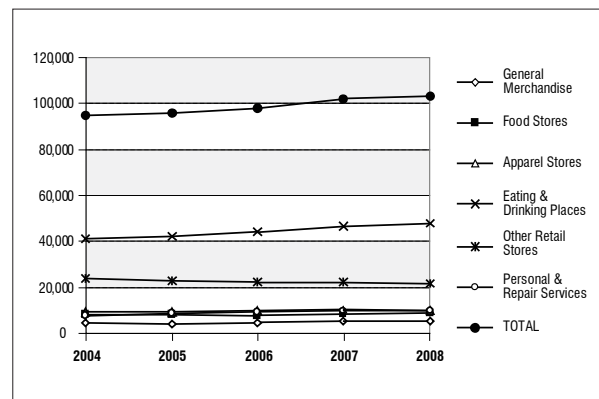
FIGURE 4 CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT FROM 2004-2008



### Retail Sector Still Recovering

Retail jobs increased 1.2% in 2008 to just over 103,440 – almost back to the recent historic high of 103,508 in 2000. Employment in the Food Stores and Eating and Drinking Places sub-sectors grew while the other sub-sectors experienced job losses (see Figure 5).

FIGURE 5 RETAIL EMPLOYMENT FROM 2004-2008



Retail sales also grew for the fifth consecutive year, totalling \$10.29 billion in 2008. Adjusting for inflation, however, this represents a drop of 0.2% from 2007 but an increase of 9.1% since 2004. Moreover, retail sales in 2008 are almost 5% lower than their historic peak in 2000 (see Table 5.2.1).

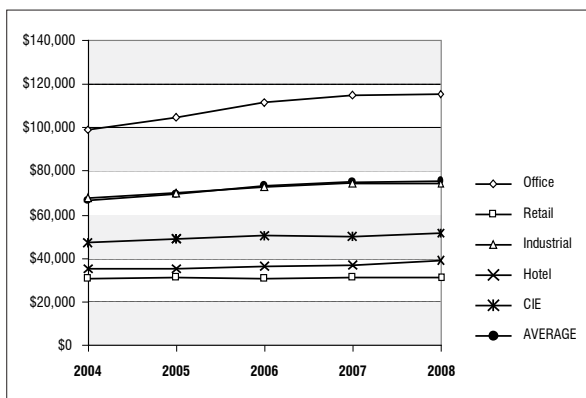
The number of retail establishments increased by 1.1% in 2008 to a total of some 7,470 retail establishments (see Tables 3.2.2 and 4.2.2).

### Average Wages Fall Slightly

Real wages fell in 2008 after having risen for four consecutive years (see Figure 6). The \$75,890 per worker average represents a 2.2% decrease from 2007. Only the Hotel sector experienced an average wage increase in 2008.

Office workers continue to be the most highly compensated, at an average of \$115,455 per year (see Table 5.1.2).

FIGURE 6 REAL WAGES FROM 2004-2008

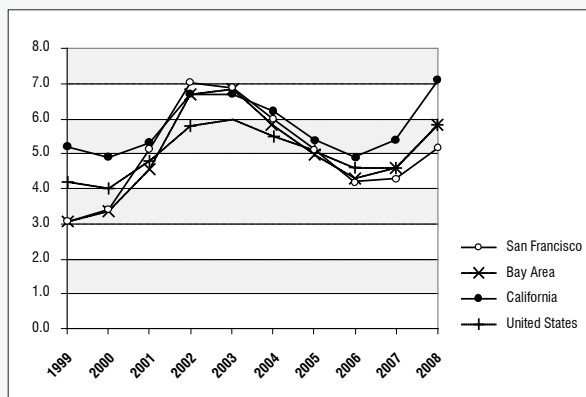


### Bay Area Jobs Grow But Unemployment is Also Up

Bay Area employment continued to increase in 2008, recovering from four years of decline that marked the dot-com bust of the early 2000s. The addition of some 17,700 new jobs brought the Bay Area total to 3.485 million employed residents in 2008. This represents an increase of almost 0.5%. However, this is still 3.5% lower than the high of 3.61 million workers in 2000. The number of employed San Francisco residents increased from 415,000 to 427,000 or 2.9% (see Table 2.1.3).

While regional employment increased slightly, regional unemployment increased substantially for the second consecutive year (see Figure 7). In 2008, 5.8% of Bay Area workers were unemployed, up from 4.6% in 2007, but still down from a recent high of 6.8% in 2003. Still, unemployment rates were much higher than the low of 3.0% in 1999, at the height of the dot.com boom. Trends are similar in San Francisco, where 5.3% of residents were unemployed in 2008. This is up from 4.3% in 2007 but lower than the 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 1999-2008





# 1.0 INTRODUCTION

## 1.1 CONTEXT

This is the fifteenth *Commerce and Industry Inventory* prepared by the San Francisco Planning Department. It contains data for calendar year 2008. 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 1999 through 2008. 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 1999-2008 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 PDR 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 1999 to 2008. The permit applications by permit status are reported only for 2008. 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 Planning Area rather than Commerce & Industry district boundaries 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:

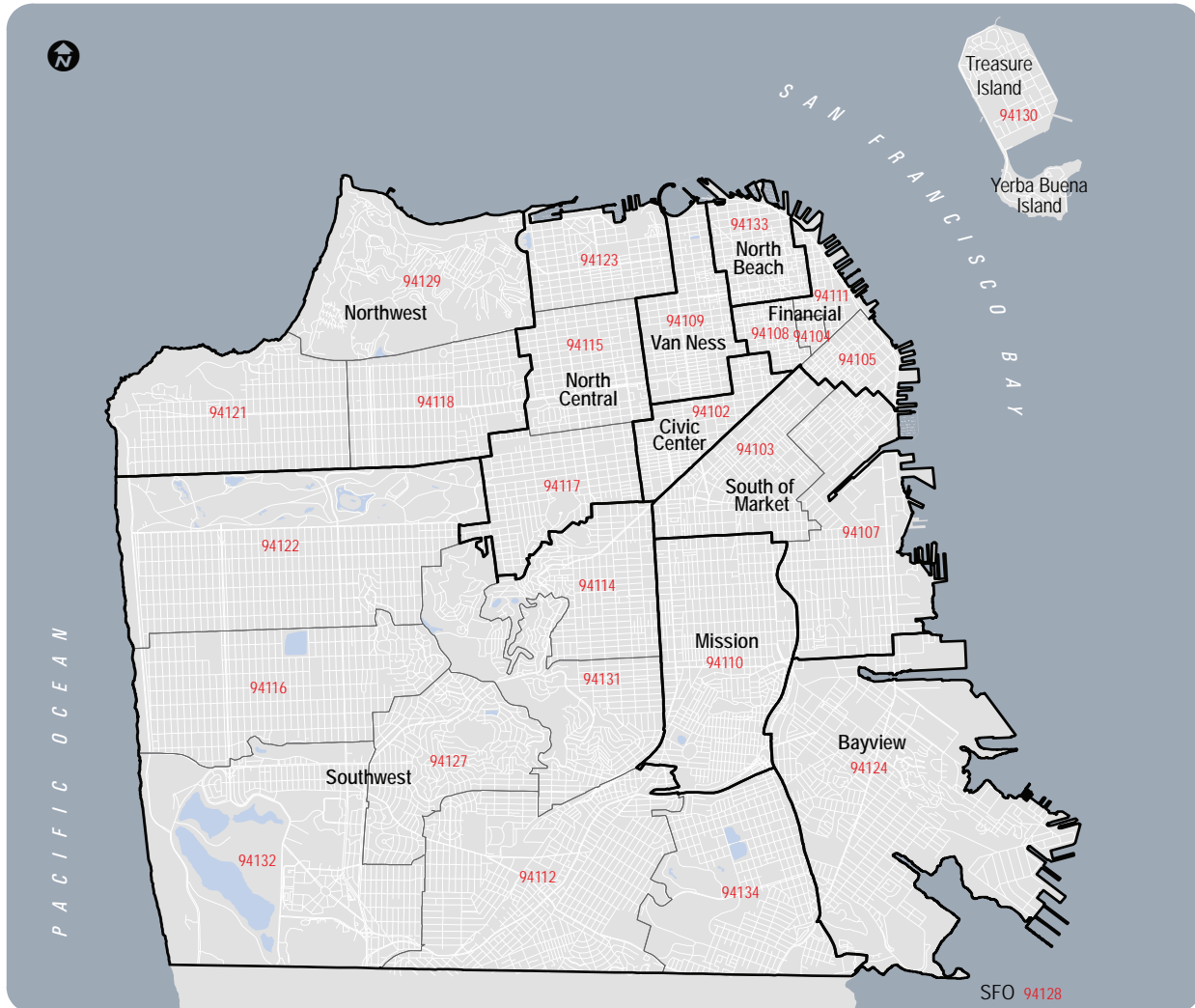
- Commerce and Industry Districts;
- Land Use Category; and
- Industry Group.

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 Miles 1  
**MAP 1.1**

 District Boundaries  
 Zip Code Boundaries

- The **Mission** and **North Beach** districts are characterized by intense local retail activities and have very defined identities for the local and visitor population.
- The **Bayview** district houses a high concentration of PDR 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 runs along a commercial corridor surrounded by mid- to high-density residential buildings.

- 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 PDR 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 cannot be assigned to specific geographic districts. 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, PDR, 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.
- **Production/Distribution/Repair (PDR)** activity includes establishments related to processing and movement of goods and provision of city-wide 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 PDR 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 2008 in Chapters 3 to 5 of this Inventory were prepared using business and employment data organized by NAICS. Data from 1999-2000 in this Inventory were prepared using business and employment data organized by SIC code. Several adjustments have been made in the data from 1999-2000 so that data in these years are comparable with 2001-2008 data to the extent possible. Even after these adjustments, however, differences in a few industry groups in 1999-2000 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<br>(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   |                         |       |  |

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           |
| <b>Office</b><br><i>Examples:</i><br>Headquarter offices,<br>professional services,<br>branch banks   | Agriculture                         | 111-115                 | Agriculture                     | Agriculture                                    | 00-08              |
|   |                                     | 211-213                 |                                 | Mining   | 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                                    |                    |
| <b>Retail</b><br><i>Examples:</i><br>Stores,<br>restaurants,<br>bars,<br>commercial<br>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              |
| <b>Production/<br/>Distribution/<br/>Repair<br/>(PDR)</b><br><i>Examples:</i><br>Warehouses,<br>factories,<br>workshops<br>showrooms,<br>port,<br>television,<br>telegraph,<br>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              |
|   |                                     | 336, 811                |                                 | Electrics & electronic manufacturing           | 36                 |
|   | Repair Services                     | 336, 811                |                                 | Transportation equipment                       | 37                 |
|   | Transp Equipment, Building Supplies | 339, 444                |                                 | Instruments, miscellaneous                     | 38-39              |
| Film & Sound Recording  | 512                                 |                         |                                 |  |                    |
| <b>Hotel</b>  | Accommodation                       | 721                     | Hotel                           | Hotel, motel, campgrounds                      | 70                 |
|   | Art and Recreation                  | 711                     | Film & Recreation               | Motion picture production & recording          | 78                 |
| <b>Cultural/<br/>Institutional/<br/>Educational<br/>(CIE)</b><br><i>Examples:</i><br>Theaters,<br>museums,<br>hospitals, schools,<br>libraries, churches  | 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                 |
|   | *                                   | *                       | Public Administration           | Public administration                          | 92, 94             |
|   | <b>Other</b>                        | Private households      | 814                             | Private households                             | Private households |
| 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 | 1999-2000         |                       |
|-------------------|-----------------------|--|------------|----------|-------------------|-----------------------|
| 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     | PDR               | Printing & Publishing |
| Office            | Office Services       | Advertising Specialties Goods Distributors                           | 54189      | 5199     | PDR               | 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     | PDR               | Transportation        |
| Retail            | Other Retail Stores   | Motor Vehicle Supplies, Used and New Parts, Tires and Tubes          | 44131      | 5013     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Furniture  | 44211      | 5021     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Floor Covering Stores  | 44221      | 5023     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Brick, Stone and Related Construction Materials                      | 44419      | 5032     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Office Equipment   | 45321      | 5044     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Computers & Computer Peripheral Equip. & Software                    | 44312      | 5045     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Medical, Dental, and Hospital Equipment and Supplies                 | 446199     | 5047     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Professional Equipment and Supplies                                  | 45321      | 5049     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Electrical Apparatus, Equip. Wiring Supplies, Construction Materials | 44419      | 5063     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Hardware, Plumbing & Heating Equipment and Supplies                  | 44413      | 5072     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Farm and Garden Machinery and Equipment                              | 44421      | 5083     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Beauty and Barber Shop Equipment and Supplies                        | 44612      | 5087     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Stationery and Office Supplies                                       | 45321      | 5112     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Heating Oil, Liquefied Petroleum Gas                                 | 45431      | 5171     | PDR               | Wholesale             |
| Retail            | Other Retail Stores   | Lawn, Garden, Flowers, Nursery Stock, & Florists' Supplies           | 44422      | 5191     | PDR               | 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      |
| PDR               | Food Manufacturing    | Custom Grain Grinding  | 311119     | 723      | Office            | Agriculture           |
| PDR               | Food Manufacturing    | Custom Slaughtering  | 311611     | 751      | Office            | Agriculture           |
| PDR               | Food manufacturing    | Meat Processed from Carcasses  | 311612     | 5147     | PDR               | Wholesale             |
| PDR               | Food manufacturing    | Bottling Mineral or Spring Water                                     | 312112     | 5149     | PDR               | Wholesale             |
| PDR               | Apparel Manufacturing | Custom Tailors and Seamstresses                                      | 315        | 5699     | Retail            | Apparel Stores        |
| PDR               | Apparel manufacturing | Converters, Broadwoven Piece Goods Fabric                            | 31331      | 5131     | PDR               | Wholesale             |
| PDR               | Printing & Publishing | Printing and Embossing on Fabric Articles                            | 323113     | 2396     | PDR               | Apparel Manufacturing |
| PDR               | Other Manufacturing   | Mops, Floor and Dust Manufacturing                                   | 339994     | 2392     | PDR               | Apparel Manufacturing |
| PDR               | Other Manufacturing   | Textile Automotive Trimmings, Seat Belts, Seat & Tire Covers         | 33636      | 2396     | PDR               | Apparel Manufacturing |
| PDR               | Other Manufacturing   | Motion Picture and Video Tape Production Industries                  | 51211      | 7812     | CIE               | Art & Recreation      |
| PDR               | Other Manufacturing   | Commercial Distribution Film Libraries                               | 51212      | 7829     | CIE               | Art & Recreation      |
| PDR               | Other Manufacturing   | Motion Picture Theaters  | 51213      | 7832     | CIE               | Art & Recreation      |
| PDR               | Other Manufacturing   | Teleproduction and Post-Production Services                          | 512191     | 7819     | CIE               | Art & Recreation      |
| PDR               | 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 1999 to 2008.

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 1999 to 2008. 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.

- **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 1999 to 2008 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



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

0 Miles 20  
**MAP 2.1**

license data, school registration, and birth and death certificate records; and tracking the status of military bases. The DoF population estimates are generally 3% to 5% 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, 1999-2008* — According to the Department of Finance estimates, San Francisco has grown to some 845,600 people in 2008, an addition of 21,100 people from 2007 or 2.6% growth. The rest of the Bay Area continues to grow with the region adding 74,600 new residents. San Francisco led the region in the rate of growth over the last two years.
- *Table 2.1.2 Bay Area Labor Force by Sub-Region, 1999-2008* — The number of San Francisco residents in the labor force increased for the third year in a row after five consecutive years of decline. Some 17,000 San Franciscans joined the labor force in 2008, a gain of almost 4%. Regionally, both San Francisco and the South Bay are growing at the fastest rates.
- *Table 2.1.3 Bay Area Employed Residents by Sub-Region, 1999-2008* — Bay Area employed residents continued to increase with the addition of 17,700 in 2008, about one-third the rate of the previous two years. 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 4%.
- *Table 2.1.4 Bay Area Unemployed Residents by Sub-Region, 1999-2008* — 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

Note: At the time of publication of this Inventory, EDD had not released 2008 county-level data for employment by industry group. As a result, the data in the following four tables is only reported for 1998 through 2007. Data for 2008 will be included in next year's Commerce and Industry Inventory.

- *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, 1999-2008**

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.

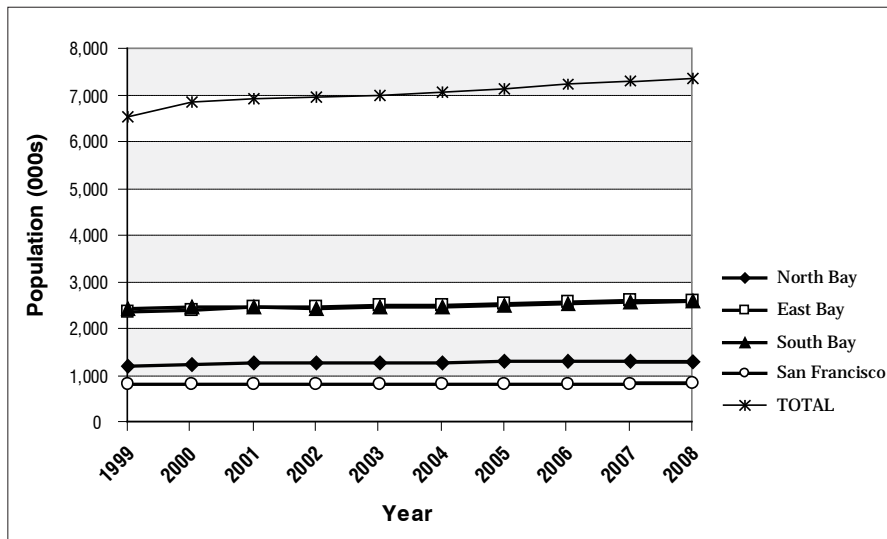
Population by Sub-Region (000s)

| Sub-Region    | 1999           | 2000           | 2001           | 2002           | 2003           | 2004           | 2005           | 2006           | 2007           | 2008           |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| North Bay     | 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        | 1,309.5        |
| East Bay      | 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        | 2,617.1        |
| South Bay     | 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        | 2,603.5        |
| San Francisco | 790.5          | 801.4          | 793.7          | 793.6          | 792.0          | 795.0          | 798.7          | 808.8          | 824.5          | 845.6          |
| <b>TOTAL</b>  | <b>6,540.5</b> | <b>6,853.8</b> | <b>6,918.8</b> | <b>6,932.7</b> | <b>6,968.7</b> | <b>7,036.2</b> | <b>7,126.3</b> | <b>7,217.4</b> | <b>7,301.1</b> | <b>7,375.7</b> |

| Annual % Distribution | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| North Bay             | 18.4         | 17.9         | 18.0         | 18.1         | 18.2         | 18.1         | 18.1         | 18.0         | 17.9         | 17.8         |
| East Bay              | 35.9         | 34.8         | 35.4         | 35.6         | 35.9         | 35.6         | 35.6         | 35.6         | 35.5         | 35.5         |
| South Bay             | 37.3         | 36.0         | 35.3         | 35.1         | 35.1         | 35.0         | 35.0         | 35.2         | 35.3         | 35.3         |
| San Francisco         | 12.1         | 11.7         | 11.5         | 11.4         | 11.4         | 11.3         | 11.2         | 11.2         | 11.3         | 11.5         |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Percentage Change | 1999-00    | 2000-01    | 2001-02    | 2002-03    | 2003-04    | 2004-05    | 2005-06    | 2006-07    | 2007-08    |
|-------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| North Bay         | 1.6        | 1.9        | 0.5        | 1.3        | 0.4        | 1.2        | 0.6        | 0.5        | 0.3        |
| East Bay          | 1.5        | 2.8        | 0.7        | 1.4        | 0.2        | 1.3        | 1.1        | 1.0        | 0.9        |
| South Bay         | 1.2        | -0.9       | -0.3       | 0.3        | 0.7        | 1.5        | 1.8        | 1.4        | 1.0        |
| San Francisco     | 1.4        | -1.0       | -0.0       | -0.2       | 0.4        | 0.5        | 1.3        | 1.9        | 2.6        |
| <b>TOTAL</b>      | <b>4.8</b> | <b>0.9</b> | <b>0.2</b> | <b>0.5</b> | <b>1.0</b> | <b>1.3</b> | <b>1.3</b> | <b>1.2</b> | <b>1.0</b> |

**FIGURE 2.1.1 BAY AREA POPULATION BY SUB-REGION, 1999-2008**



**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, 1999-2008**

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.

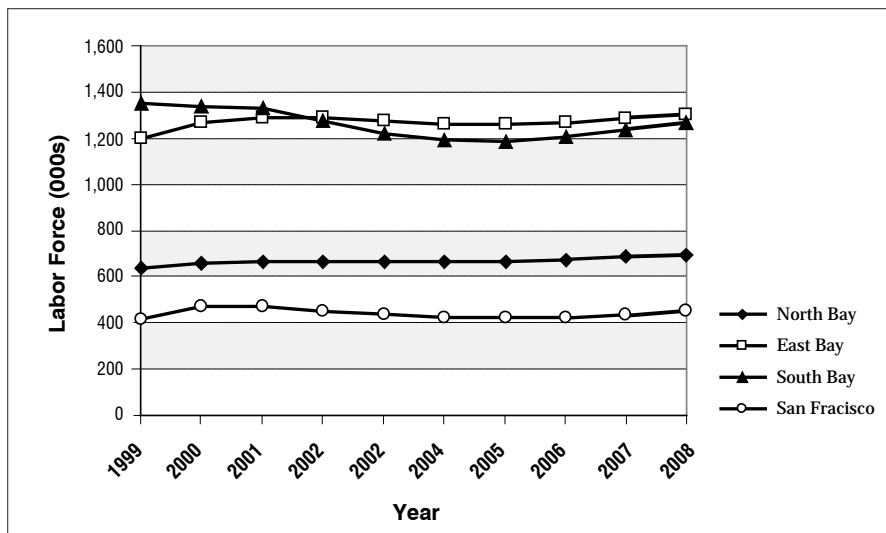
Residents in the Labor Force by Sub-Region (000s)

| Sub-Region    | 1999           | 2000           | 2001           | 2002           | 2003           | 2004           | 2005           | 2006           | 2007           | 2008           |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| North Bay     | 634.7          | 660.2          | 665.3          | 667.4          | 664.7          | 665.6          | 668.3          | 674.9          | 684.3          | 690.4          |
| East Bay      | 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        | 1,295.7        |
| South Bay     | 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        | 1,264.3        |
| San Francisco | 417.9          | 472.6          | 469.4          | 450.4          | 433.0          | 422.3          | 420.5          | 422.5          | 433.3          | 450.4          |
| <b>TOTAL</b>  | <b>3,607.9</b> | <b>3,740.1</b> | <b>3,753.9</b> | <b>3,676.8</b> | <b>3,591.7</b> | <b>3,540.6</b> | <b>3,536.0</b> | <b>3,567.5</b> | <b>3,633.8</b> | <b>3,633.8</b> |

| Annual % Distribution | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| North Bay             | 17.6         | 17.7         | 17.7         | 18.2         | 18.5         | 18.8         | 18.9         | 18.9         | 18.8         | 18.7         |
| East Bay              | 33.3         | 33.9         | 34.3         | 35.0         | 35.4         | 35.6         | 35.6         | 35.5         | 35.3         | 35.0         |
| South Bay             | 37.5         | 35.8         | 35.5         | 34.6         | 34.0         | 33.7         | 33.6         | 33.8         | 34.0         | 34.2         |
| San Francisco         | 11.6         | 12.6         | 12.5         | 12.2         | 12.1         | 11.9         | 11.9         | 11.8         | 11.9         | 12.2         |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Percentage Change | 1999-00    | 2000-01    | 2001-02     | 2002-03     | 2003-04     | 2004-05     | 2005-06    | 2006-07    | 2007-08    |
|-------------------|------------|------------|-------------|-------------|-------------|-------------|------------|------------|------------|
| North Bay         | 4.0        | 0.8        | 0.3         | -0.4        | 0.1         | 0.4         | 1.0        | 1.4        | 0.9        |
| East Bay          | 5.7        | 1.3        | 0.1         | -1.2        | -1.1        | 0.0         | 0.4        | 1.3        | 1.1        |
| South Bay         | -1.2       | -0.4       | -4.6        | -3.9        | -2.3        | -0.5        | 1.5        | 2.5        | 2.4        |
| San Francisco     | 13.1       | -0.7       | -4.0        | -3.9        | -2.5        | -0.4        | 0.5        | 2.6        | 3.9        |
| <b>TOTAL</b>      | <b>3.7</b> | <b>0.4</b> | <b>-2.1</b> | <b>-2.3</b> | <b>-1.4</b> | <b>-0.1</b> | <b>0.9</b> | <b>1.9</b> | <b>1.8</b> |

**FIGURE 2.1.2 BAY AREA LABOR FORCE BY SUB-REGION, 1999-2008**



**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](http://www.labormarketinfo.edd.ca.gov/?PAGEID=131)

**TABLE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1999-2008**

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.

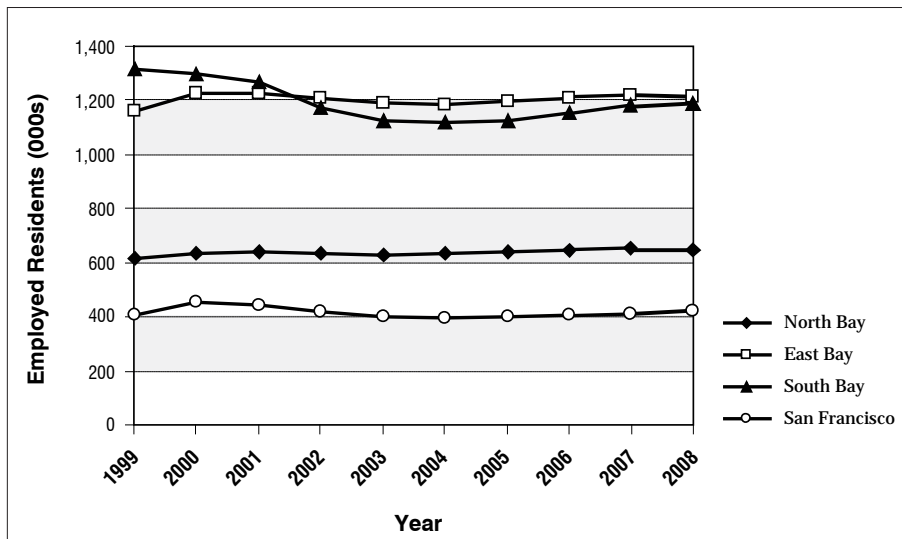
Employed Residents by Sub-Region (000s)

| Sub-Region    | 1999           | 2000           | 2001           | 2002           | 2003           | 2004           | 2005           | 2006           | 2007           | 2008           |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| North Bay     | 614.4          | 636.4          | 639.4          | 632.6          | 627.7          | 631.4          | 637.6          | 646.7          | 653.2          | 650.3          |
| East Bay      | 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        | 1,215.5        |
| South Bay     | 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        | 1,193.3        |
| San Francisco | 405.1          | 456.5          | 445.4          | 418.7          | 403.2          | 397.1          | 399.0          | 404.7          | 414.6          | 426.7          |
| <b>TOTAL</b>  | <b>3,497.9</b> | <b>3,613.8</b> | <b>3,582.8</b> | <b>3,431.0</b> | <b>3,346.4</b> | <b>3,335.4</b> | <b>3,359.6</b> | <b>3,414.8</b> | <b>3,468.1</b> | <b>3,485.8</b> |

| Annual % Distribution | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| North Bay             | 17.6         | 17.6         | 17.8         | 18.4         | 18.8         | 18.9         | 19.0         | 18.9         | 18.8         | 18.7         |
| East Bay              | 33.2         | 33.9         | 34.3         | 35.2         | 35.5         | 35.6         | 35.6         | 35.4         | 35.2         | 34.9         |
| South Bay             | 37.6         | 35.9         | 35.4         | 34.2         | 33.7         | 33.6         | 33.5         | 33.8         | 34.0         | 34.2         |
| San Francisco         | 11.6         | 12.6         | 12.4         | 12.2         | 12.0         | 11.9         | 11.9         | 11.9         | 12.0         | 12.2         |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Percentage Change | 1999-00    | 2000-01     | 2001-02     | 2002-03     | 2003-04     | 2004-05    | 2005-06    | 2006-07    | 2007-08    |
|-------------------|------------|-------------|-------------|-------------|-------------|------------|------------|------------|------------|
| North Bay         | 3.6        | 0.5         | -1.1        | -0.8        | 0.6         | 1.0        | 1.4        | 1.0        | -0.4       |
| East Bay          | 5.4        | 0.4         | -1.8        | -1.5        | -0.2        | 0.8        | 1.1        | 0.9        | -0.4       |
| South Bay         | -1.5       | -2.1        | -7.5        | -4.0        | -0.6        | 0.6        | 2.4        | 2.3        | 1.2        |
| San Francisco     | 12.7       | -2.4        | -6.0        | -3.7        | -1.5        | 0.5        | 1.4        | 2.4        | 2.9        |
| <b>TOTAL</b>      | <b>3.3</b> | <b>-0.9</b> | <b>-4.2</b> | <b>-2.5</b> | <b>-0.3</b> | <b>0.7</b> | <b>1.6</b> | <b>1.6</b> | <b>0.5</b> |

**FIGURE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1999-2008**



**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](http://www.labormarketinfo.edd.ca.gov/?PAGEID=131)

**TABLE 2.1.4 BAY AREA UNEMPLOYMENT BY SUB-REGION, 1999-2008**

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    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| North Bay     | 20.1         | 23.8         | 25.9         | 34.8         | 37.0         | 34.2         | 30.7         | 28.2         | 31.1         | 39.9         |
| East Bay      | 39.7         | 45.6         | 57.9         | 81.8         | 84.3         | 72.8         | 63.5         | 55.5         | 60.9         | 80.1         |
| South Bay     | 37.0         | 40.8         | 63.3         | 97.5         | 94.2         | 73.0         | 60.7         | 51.2         | 55.0         | 70.9         |
| San Francisco | 12.8         | 16.1         | 24.0         | 31.7         | 29.8         | 25.2         | 21.5         | 17.8         | 18.7         | 23.7         |
| <b>TOTAL</b>  | <b>109.6</b> | <b>126.3</b> | <b>171.1</b> | <b>245.8</b> | <b>245.3</b> | <b>205.2</b> | <b>176.4</b> | <b>152.7</b> | <b>165.7</b> | <b>214.6</b> |

| Annual % Distribution | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| North Bay             | 18.3         | 18.8         | 15.1         | 14.2         | 15.1         | 16.7         | 17.4         | 18.5         | 18.8         | 18.6         |
| East Bay              | 36.2         | 36.1         | 33.8         | 33.3         | 34.4         | 35.5         | 36.0         | 36.3         | 36.8         | 37.3         |
| South Bay             | 33.8         | 32.3         | 37.0         | 39.7         | 38.4         | 35.6         | 34.4         | 33.5         | 33.2         | 33.0         |
| San Francisco         | 11.7         | 12.7         | 14.0         | 12.9         | 12.1         | 12.3         | 12.2         | 11.7         | 11.3         | 11.0         |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Percentage Change | 1999-00     | 2000-01     | 2001-02     | 2002-03     | 2003-04      | 2004-05      | 2005-06      | 2006-07    | 2007-08     |
|-------------------|-------------|-------------|-------------|-------------|--------------|--------------|--------------|------------|-------------|
| North Bay         | 18.4        | 8.8         | 34.4        | 6.3         | -7.6         | -10.2        | -8.1         | 10.3       | 28.3        |
| East Bay          | 14.9        | 27.0        | 41.3        | 3.1         | -13.6        | -12.8        | -12.6        | 9.7        | 31.5        |
| South Bay         | 10.3        | 55.1        | 54.0        | -3.4        | -22.5        | -16.8        | -15.7        | 7.4        | 28.9        |
| San Francisco     | 25.8        | 49.1        | 32.1        | -6.0        | -15.4        | -14.7        | -17.2        | 5.1        | 26.7        |
| <b>TOTAL</b>      | <b>15.2</b> | <b>35.5</b> | <b>43.7</b> | <b>-0.2</b> | <b>-16.3</b> | <b>-14.0</b> | <b>-13.4</b> | <b>8.5</b> | <b>29.5</b> |

| Average Annual Rate | 1999       | 2000       | 2001       | 2002       | 2003       | 2004       | 2005       | 2006       | 2007       | 2008       |
|---------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| North Bay           | 3.2        | 3.6        | 3.9        | 5.2        | 5.6        | 5.1        | 4.6        | 4.2        | 4.5        | 5.8        |
| East Bay            | 3.3        | 3.6        | 4.5        | 6.4        | 6.6        | 5.8        | 5.0        | 4.4        | 4.8        | 6.2        |
| South Bay           | 2.7        | 3.1        | 4.8        | 7.7        | 7.7        | 6.1        | 5.1        | 4.2        | 4.5        | 5.6        |
| San Francisco       | 3.1        | 3.4        | 5.1        | 7.0        | 6.9        | 6.0        | 5.1        | 4.2        | 4.3        | 5.3        |
| <b>Average</b>      | <b>3.0</b> | <b>3.4</b> | <b>4.6</b> | <b>6.7</b> | <b>6.8</b> | <b>5.8</b> | <b>5.0</b> | <b>4.3</b> | <b>4.6</b> | <b>5.8</b> |

| Average Annual Rate | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---------------------|------|------|------|------|------|------|------|------|------|------|
| California          | 5.2  | 4.9  | 5.3  | 6.7  | 6.7  | 6.2  | 5.4  | 4.9  | 5.4  | 7.2  |
| United States       | 4.2  | 4.0  | 4.8  | 5.8  | 6    | 5.5  | 5.1  | 4.6  | 4.6  | 5.8  |

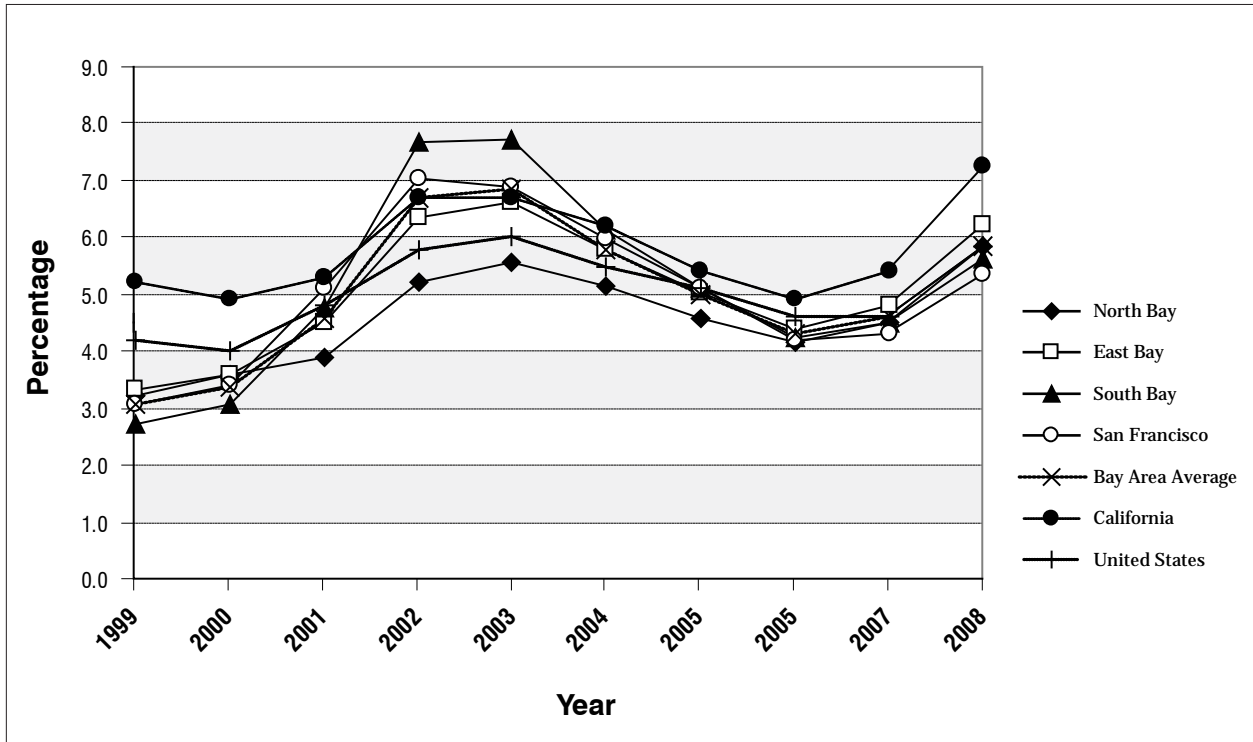
**Notes:**

- 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](http://www.labormarketinfo.edd.ca.gov/?PAGEID=131)
- US Bureau of Labor Statistics; [http://www.bls.gov/cps/prev\\_yrs.htm](http://www.bls.gov/cps/prev_yrs.htm)

FIGURE 2.1.4 UNEMPLOYMENT RATE BY SUB-REGION, 1999-2008



**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          |
| <b>TOTAL</b>                             | <b>3314.1</b> | <b>3,403.8</b> | <b>3,557.0</b> | <b>3,522.8</b> | <b>3,339.0</b> | <b>3,247.5</b> | <b>3,218.5</b> | <b>3,244.5</b> | <b>3,286.1</b> | <b>3,330.6</b> |

## 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         |
| <b>TOTAL</b>                             | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## 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        |
| <b>TOTAL</b>                             | <b>2.7</b> | <b>4.5</b> | <b>-1.0</b> | <b>-5.2</b> | <b>-2.7</b> | <b>-0.9</b> | <b>0.8</b> | <b>1.3</b> | <b>1.4</b> |

## 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          |
| <b>Regional Total</b> | <b>3,314.1</b> | <b>3,403.8</b> | <b>3,557.0</b> | <b>3,522.8</b> | <b>3,339.0</b> | <b>3,247.5</b> | <b>3,218.5</b> | <b>3,244.5</b> | <b>3,286.1</b> | <b>3,330.6</b> |

**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         |
| <b>Regional Total</b> | <b>26.1</b> | <b>25.9</b> | <b>27.0</b> | <b>28.1</b> | <b>27.2</b> | <b>25.8</b> | <b>25.4</b> | <b>22.5</b> | <b>20.2</b> | <b>20.6</b> |

**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         |
| <b>Regional Total</b> | <b>160.2</b> | <b>177.1</b> | <b>191.0</b> | <b>198.0</b> | <b>186.8</b> | <b>191.1</b> | <b>187.6</b> | <b>194.2</b> | <b>196.0</b> | <b>194.7</b> |

**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         |
| <b>Regional Total</b> | <b>479.0</b> | <b>465.4</b> | <b>486.9</b> | <b>468.3</b> | <b>409.3</b> | <b>370.8</b> | <b>361.9</b> | <b>353.8</b> | <b>352.0</b> | <b>345.0</b> |

**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         |
| <b>Regional Total</b> | <b>593.1</b> | <b>604.0</b> | <b>617.6</b> | <b>612.3</b> | <b>584.3</b> | <b>566.4</b> | <b>558.4</b> | <b>562.5</b> | <b>564.1</b> | <b>571.3</b> |

**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         |
| <b>Regional Total</b> | <b>110.0</b> | <b>122.2</b> | <b>151.7</b> | <b>146.8</b> | <b>127.0</b> | <b>117.0</b> | <b>114.0</b> | <b>112.4</b> | <b>112.5</b> | <b>113.3</b> |

CONTINUED &gt;

## 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         |
| <b>Regional Total</b> | <b>194.4</b> | <b>197.8</b> | <b>198.9</b> | <b>213.3</b> | <b>211.4</b> | <b>211.5</b> | <b>209.2</b> | <b>213.3</b> | <b>213.4</b> | <b>206.1</b> |

| Professional & Business Services | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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        |
| <b>Regional Total</b>            | <b>588.0</b> | <b>621.6</b> | <b>670.9</b> | <b>619.8</b> | <b>541.5</b> | <b>517.0</b> | <b>518.1</b> | <b>529.7</b> | <b>549.8</b> | <b>572.4</b> |

| Educational & Health Services | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b>         | <b>328.6</b> | <b>335.6</b> | <b>334.9</b> | <b>344.0</b> | <b>349.6</b> | <b>355.6</b> | <b>358.6</b> | <b>362.3</b> | <b>373.1</b> | <b>380.0</b> |

| Leisure & Hospitality | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b> | <b>283.9</b> | <b>291.1</b> | <b>299.0</b> | <b>306.3</b> | <b>302.2</b> | <b>302.9</b> | <b>306.7</b> | <b>312.3</b> | <b>322.0</b> | <b>329.9</b> |

| Other Services        | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b> | <b>109.1</b> | <b>109.1</b> | <b>111.1</b> | <b>114.8</b> | <b>115.2</b> | <b>112.8</b> | <b>111.2</b> | <b>110.4</b> | <b>109.8</b> | <b>111.5</b> |

| Government            | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b> | <b>441.7</b> | <b>454.0</b> | <b>468.0</b> | <b>471.1</b> | <b>484.5</b> | <b>476.6</b> | <b>467.4</b> | <b>471.1</b> | <b>473.2</b> | <b>485.8</b> |

## 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         |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

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          |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

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          |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

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          |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

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         |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

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         |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

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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         |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Professional & Business Services | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b>            | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Educational & Health Services | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b>         | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Leisure & Hospitality | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Other Services        | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

| Government            | 1998         | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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         |
| <b>Regional Total</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## 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         |
| <b>Regional Total</b>                               | <b>2.7</b>  | <b>4.5</b>  | <b>-1.0</b> | <b>-5.2</b>  | <b>-2.7</b> | <b>-0.9</b> | <b>0.8</b>   | <b>1.3</b>   | <b>1.4</b>  |
| <b>Farm</b>   |             |             |             |              |             |             |              |              |             |
| 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       |
| <b>Regional Total</b>                               | <b>-0.8</b> | <b>4.2</b>  | <b>4.1</b>  | <b>-3.2</b>  | <b>-5.1</b> | <b>-1.6</b> | <b>-11.4</b> | <b>-10.2</b> | <b>2.0</b>  |
| <b>Natural Resources, Mining &amp; Construction</b> |             |             |             |              |             |             |              |              |             |
| 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         |
| <b>Regional Total</b>                               | <b>10.5</b> | <b>7.8</b>  | <b>3.7</b>  | <b>-5.7</b>  | <b>2.3</b>  | <b>-1.8</b> | <b>3.5</b>   | <b>0.9</b>   | <b>-0.7</b> |
| <b>Manufacturing</b>                                |             |             |             |              |             |             |              |              |             |
| 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         |
| <b>Regional Total</b>                               | <b>-2.8</b> | <b>4.6</b>  | <b>-3.8</b> | <b>-12.6</b> | <b>-9.4</b> | <b>-2.4</b> | <b>-2.2</b>  | <b>-0.5</b>  | <b>-2.0</b> |
| <b>Trade, Transportation &amp; Utilities</b>        |             |             |             |              |             |             |              |              |             |
| 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        |
| <b>Regional Total</b>                               | <b>1.8</b>  | <b>2.3</b>  | <b>-0.9</b> | <b>-4.6</b>  | <b>-3.1</b> | <b>-1.4</b> | <b>0.7</b>   | <b>0.3</b>   | <b>1.3</b>  |
| <b>Information</b>                                  |             |             |             |              |             |             |              |              |             |
| 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         |
| <b>Regional Total</b>                               | <b>11.1</b> | <b>24.1</b> | <b>-3.2</b> | <b>-13.5</b> | <b>-7.9</b> | <b>-2.6</b> | <b>-1.4</b>  | <b>0.1</b>   | <b>0.7</b>  |

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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         |
| <b>Regional Total</b> | <b>1.7</b> | <b>0.6</b> | <b>7.2</b> | <b>-0.9</b> | <b>0.0</b> | <b>-1.1</b> | <b>2.0</b> | <b>0.0</b> | <b>-3.4</b> |

## Professional &amp; 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        |
| <b>Regional Total</b> | <b>5.7</b> | <b>7.9</b> | <b>-7.6</b> | <b>-12.6</b> | <b>-4.5</b> | <b>0.2</b> | <b>2.2</b> | <b>3.8</b> | <b>4.1</b> |

## Educational &amp; 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        |
| <b>Regional Total</b> | <b>2.1</b> | <b>-0.2</b> | <b>2.7</b> | <b>1.6</b> | <b>1.7</b> | <b>0.8</b> | <b>1.0</b> | <b>3.0</b> | <b>1.8</b> |

## Leisure &amp; 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        |
| <b>Regional Total</b> | <b>2.1</b> | <b>2.7</b> | <b>2.4</b> | <b>-1.3</b> | <b>0.2</b> | <b>1.3</b> | <b>1.8</b> | <b>3.1</b> | <b>2.5</b> |

## 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        |
| <b>Regional Total</b> | <b>0.0</b> | <b>1.8</b> | <b>3.3</b> | <b>0.3</b> | <b>-2.1</b> | <b>-1.4</b> | <b>-0.7</b> | <b>-0.5</b> | <b>1.5</b> |

## 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        |
| <b>Regional Total</b> | <b>2.8</b> | <b>3.1</b> | <b>0.7</b> | <b>2.8</b> | <b>-1.6</b> | <b>-1.9</b> | <b>0.8</b> | <b>0.4</b> | <b>2.7</b> |

## 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 1999 to 2008. 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.labormarketinfo.edd.ca.gov>). The latter data omit private household employment data (NAICS 814) and are adjusted throughout the year. The NAICS 814 classification counts private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household as distinct employment “establishments.” These household employees include cooks, maids, butlers, private caregivers, gardeners, groundskeeper/caretakers, and other household maintenance workers.

Employment data are presented by the major economy sectors under each type of land use category. From 1999 and 2000, economic sectors were organized according to Standard Industrial Classification system (SIC). In 2001, economic sectors started being organized according to North American Industry Classification system (NAICS). Both industry classification systems are discussed in Section 1.2 – Data Formats. Table 1.1 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, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Section 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. For 1999 and 2000 data, public administration jobs were parsed out in Office, PDR, and CIE land use categories.

Table 3.1 shows employment data by Land Use Category from 1999 to 2008. Tables 3.2.1 through 3.2.4 show employment data by Industry Group within each Land Use Category in San Francisco from 1999 to 2008. 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 2008. It also shows Private Household employment as a subset of the Other land use category. This category represents home-based business establishments and organizations, particularly care-givers. These employees were previously classified under the Cultural/Institutional/Educational land use category.

### Employment by Land Use Category

- *Table 3.1 San Francisco Employment by Land Use Category, 1999-2008* — All land use categories except PDR showed gains in employment in 2008. Even within the PDR land use category, however, the loss of jobs was minimal. Overall, in 2008 the number of jobs in San Francisco increased by 2.6%; this is less than the 3.8% growth from the previous year.
- *Table 3.2.1 Office Employment by Industry Groups, 1999-2008* — Office Services, by far the largest office group, posted a 3% gain in 2008. The Public Administration industry group had the greatest increase, growing by almost 4,000 jobs (12.6%). All the other Industry Groups except for Finance and Insurance also posted job gains.

- *Table 3.2.2 Retail Employment by Industry Group, 1999-2008* — 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 five years, with the exception of Eating and Drinking Place jobs for which the percentage has been steadily increasing since 2003. Within the Retail land use category, only Eating and Drinking Places and Food Stores posted job gains in 2008.
- *Table 3.2.3 PDR Employment by Industry Group, 1999-2008* — Within the PDR land use category, the Apparel Manufacturing, Transportation, Other Manufacturing, and Printing and Publishing groups experienced job losses. All other PDR Industry Groups experienced job growth in 2008.
- *Table 3.2.4 Cultural/Institutional/Educational (CIE) Employment by Industry Group, 1999-2008* — All CIE Industry Groups except for Art & Recreation and Health Care showed employment gains in 2008, with Other CIE Services showing the healthiest gain (17.2%).

### Employment by Geographic District

- *Table 3.3 Employment by Commerce and Industry District and Land Use Category, 2008* — Most of the jobs are located in the Financial (31.7%) and South of Market (21.6%) districts. The Mission (3.0%), North Beach (3.2%), and Van Ness (3.3%) districts have the fewest number of jobs. Employment in the private households (jobs that are home-based) account for about 2.9% of the total jobs.

**TABLE 3.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1999-2008**

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 1999-2008, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1999-2000 data and 2001-2008 data (see Section 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 2008) and 3.1.2 (a look at ten-year trends).

**Annual Average Number of Jobs**

| Land Use Category | 1999           | 2000           | 2001           | 2002           | 2003           | 2004           | 2005           | 2006           | 2007           | 2008           |
|-------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Office            | 229,285        | 243,290        | 236,959        | 213,813        | 201,492        | 193,180        | 195,521        | 206,271        | 214,661        | 221,250        |
| Retail            | 97,159         | 103,508        | 101,505        | 93,735         | 95,599         | 95,006         | 96,033         | 98,294         | 102,253        | 103,443        |
| PDR               | 117,588        | 116,540        | 107,837        | 97,860         | 93,726         | 89,037         | 84,693         | 81,699         | 84,986         | 84,710         |
| Hotel             | 19,522         | 18,862         | 17,962         | 16,477         | 17,438         | 18,090         | 18,424         | 19,087         | 19,070         | 19,527         |
| CIE               | 127,611        | 126,066        | 122,222        | 122,254        | 124,882        | 127,962        | 128,726        | 130,645        | 135,361        | 141,848        |
| <b>TOTAL</b>      | <b>591,166</b> | <b>608,266</b> | <b>586,485</b> | <b>546,960</b> | <b>533,136</b> | <b>523,274</b> | <b>523,396</b> | <b>535,996</b> | <b>556,330</b> | <b>570,778</b> |

**Annual Percentage Distribution**

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 38.8         | 40.0         | 40.4         | 39.1         | 37.8         | 36.9         | 37.4         | 38.5         | 38.6         | 38.8         |
| Retail            | 16.4         | 17.0         | 17.3         | 17.6         | 17.9         | 18.2         | 18.3         | 18.3         | 18.4         | 18.1         |
| PDR               | 19.9         | 19.2         | 18.4         | 17.9         | 17.6         | 17.0         | 16.2         | 15.2         | 15.3         | 14.8         |
| Hotel             | 3.3          | 3.1          | 3.1          | 3.0          | 3.3          | 3.5          | 3.5          | 3.6          | 3.4          | 3.4          |
| CIE               | 21.6         | 20.7         | 20.8         | 22.3         | 23.4         | 24.5         | 24.6         | 24.4         | 24.3         | 24.9         |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

**Percentage Change**

| Land Use Category | 1999-00    | 2000-01    | 2001-02     | 2001-02     | 2003-04     | 2004-05    | 2005-06    | 2006-07    | 2007-08    |
|-------------------|------------|------------|-------------|-------------|-------------|------------|------------|------------|------------|
| Office            | 6.1        | N/A        | -9.8        | -5.8        | -4.1        | 1.2        | 5.5        | 4.1        | 3.1        |
| Retail            | 6.5        | N/A        | -4.9        | -1.0        | -0.6        | 1.1        | 2.4        | 4.0        | 1.2        |
| PDR               | -0.9       | N/A        | -9.3        | -4.2        | -5.0        | -4.9       | -3.5       | 4.0        | -0.3       |
| Hotel             | -3.4       | N/A        | -8.3        | 5.8         | 3.7         | 1.8        | 3.6        | -0.1       | 2.4        |
| CIE               | -1.2       | N/A        | 0.0         | 2.1         | 2.5         | 0.6        | 1.5        | 3.6        | 4.8        |
| <b>TOTAL</b>      | <b>2.9</b> | <b>N/A</b> | <b>-6.7</b> | <b>-2.5</b> | <b>-1.8</b> | <b>0.0</b> | <b>2.4</b> | <b>3.8</b> | <b>2.6</b> |

**Notes:**

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- 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 1999-2005, annual average includes last quarter of previous year, and first three quarters of current year.

**Sources:**

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

FIGURE 3.1.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2008

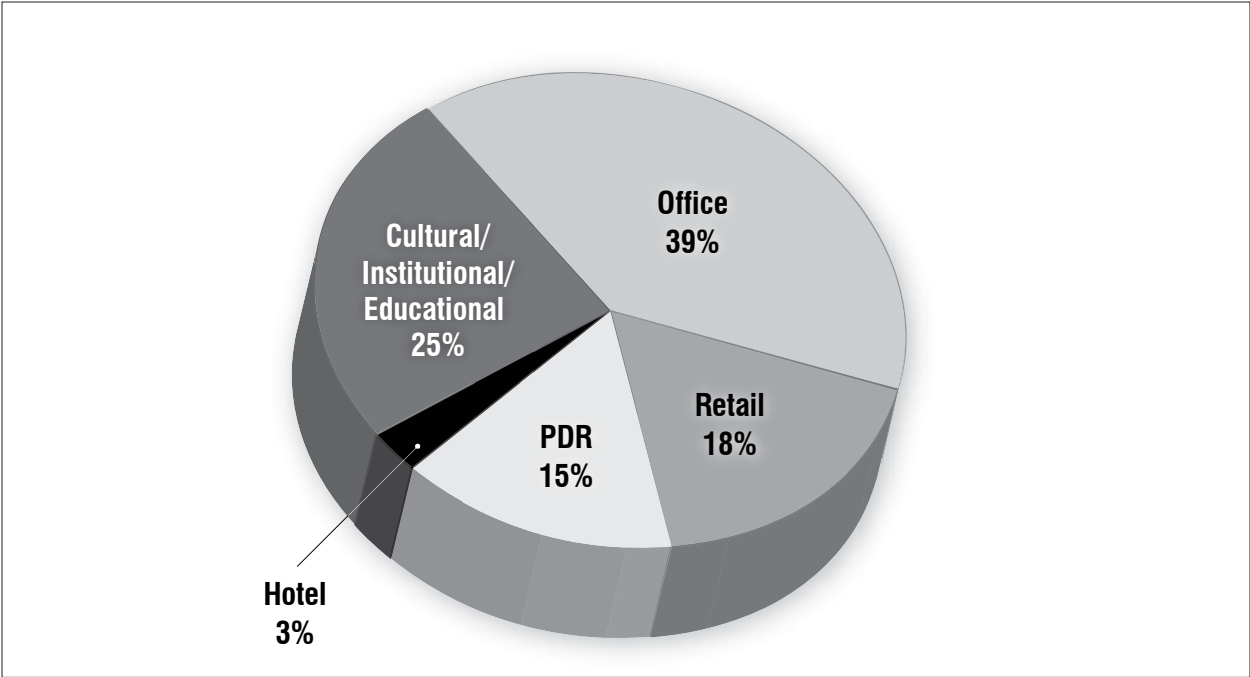
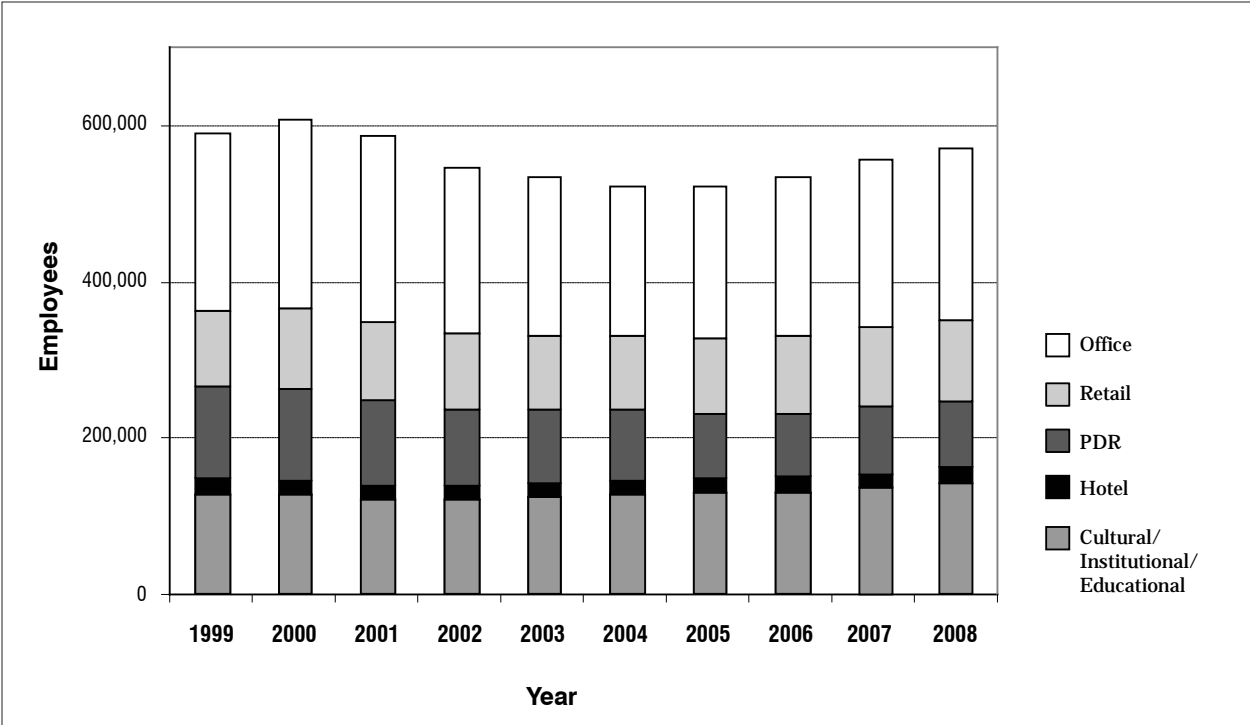


FIGURE 3.1.2 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1999-2008



**TABLE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1999-2008**

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        | 1999           | 2000           | 2001           | 2002           | 2003           | 2004           | 2005           | 2006           | 2007           | 2008           |
|-----------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Agriculture           | 1,732          | 1,674          | 172            | 173            | 404            | 385            | 228            | 241            | 220            | 251            |
| Finance               | 49,886         | 49,366         | 44,064         | 39,381         | 35,314         | 33,748         | 33,554         | 34,239         | 34,975         | 33,033         |
| Insurance             | 14,855         | 15,448         | 12,417         | 12,070         | 12,897         | 12,527         | 12,174         | 11,962         | 12,249         | 12,003         |
| Real Estate           | 10,741         | 10,576         | 9,763          | 9,866          | 10,177         | 9,910          | 10,033         | 10,316         | 10,704         | 10,739         |
| Office Services       | 121,456        | 133,830        | 138,862        | 119,468        | 109,970        | 104,611        | 108,312        | 118,328        | 124,973        | 128,754        |
| Public Administration | 30,615         | 32,395         | 31,681         | 32,834         | 32,718         | 31,635         | 29,834         | 29,339         | 31,490         | 35,458         |
| <b>TOTAL</b>          | <b>229,285</b> | <b>243,290</b> | <b>236,959</b> | <b>213,791</b> | <b>201,480</b> | <b>192,816</b> | <b>194,136</b> | <b>204,425</b> | <b>214,611</b> | <b>220,237</b> |

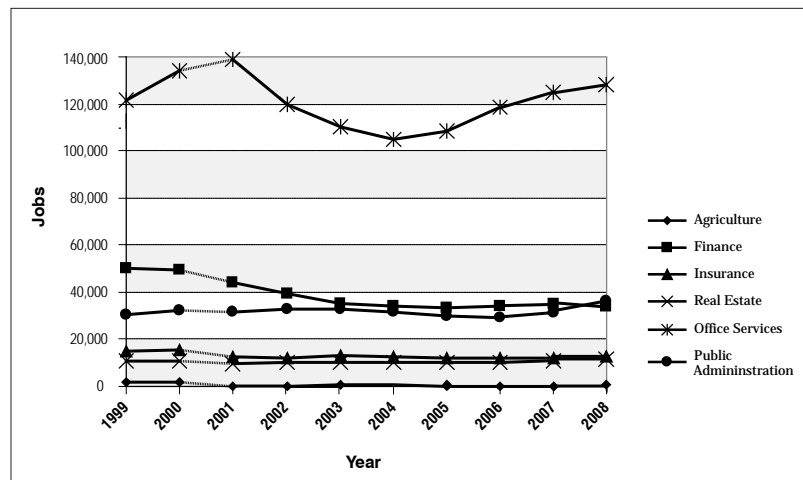
Annual Percentage Distribution

| Industry Group        | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Agriculture           | 0.8          | 0.7          | 0.1          | 0.1          | 0.2          | 0.2          | 0.1          | 0.1          | 0.1          | 0.1          |
| Finance               | 21.8         | 20.3         | 18.6         | 18.4         | 17.5         | 17.5         | 17.3         | 16.7         | 16.3         | 15.0         |
| Insurance             | 6.5          | 6.3          | 5.2          | 5.6          | 6.4          | 6.5          | 6.3          | 5.9          | 5.7          | 5.5          |
| Real Estate           | 4.7          | 4.3          | 4.1          | 4.6          | 5.1          | 5.1          | 5.2          | 5.0          | 5.0          | 4.9          |
| Office Services       | 53.0         | 55.0         | 58.6         | 55.9         | 54.6         | 54.3         | 55.8         | 57.9         | 58.2         | 58.5         |
| Public Administration | 13.4         | 13.3         | 13.4         | 15.4         | 16.2         | 16.4         | 15.4         | 14.4         | 14.7         | 16.1         |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

Percentage Change

| Industry Group        | 1999-00    | 2000-01    | 2001-02     | 2002-03     | 2003-04     | 2004-05    | 2005-06    | 2006-07    | 2007-08    |
|-----------------------|------------|------------|-------------|-------------|-------------|------------|------------|------------|------------|
| Agriculture           | -3.4       | N/A        | 0.9         | 133.3       | -4.9        | -40.8      | 5.8        | -8.5       | 13.7       |
| Finance               | -1.0       | N/A        | -10.6       | -10.3       | -4.4        | -0.6       | 2.0        | 2.1        | -5.6       |
| Insurance             | 4.0        | N/A        | -2.8        | 6.8         | -2.9        | -2.8       | -1.7       | 2.4        | -2.0       |
| Real Estate           | -1.5       | N/A        | 1.0         | 3.2         | -2.6        | 1.2        | 2.8        | 3.8        | 0.3        |
| Office Services       | 10.2       | N/A        | -14.0       | -8.0        | -4.9        | 3.5        | 9.2        | 5.6        | 3.0        |
| Public Administration | 5.8        | N/A        | 3.6         | -0.4        | -3.3        | -5.7       | -1.7       | 7.3        | 12.6       |
| <b>TOTAL</b>          | <b>6.1</b> | <b>N/A</b> | <b>-9.8</b> | <b>-5.8</b> | <b>-4.3</b> | <b>0.7</b> | <b>5.3</b> | <b>5.0</b> | <b>2.6</b> |

**FIGURE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1999-2008**



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, 1999-2008**

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             | 1999          | 2000           | 2001           | 2002          | 2003          | 2004          | 2005          | 2006          | 2007           | 2008           |
|----------------------------|---------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|----------------|----------------|
| General Merchandise        | 4,372         | 4,800          | 4,736          | 4,631         | 5,543         | 4,662         | 4,401         | 4,921         | 5,486          | 5,337          |
| Food Stores                | 9,041         | 8,448          | 8,311          | 8,210         | 8,051         | 8,144         | 8,394         | 7,940         | 8,382          | 8,694          |
| Apparel Stores             | 10,135        | 12,259         | 9,348          | 9,209         | 8,871         | 9,285         | 9,509         | 9,698         | 10,313         | 10,117         |
| Eating & Drinking Places   | 40,481        | 42,820         | 42,415         | 41,214        | 41,358        | 41,378        | 42,139        | 44,183        | 46,260         | 47,662         |
| Other Retail Stores        | 19,893        | 22,174         | 27,165         | 20,762        | 23,356        | 23,859        | 22,794        | 22,247        | 22,033         | 21,926         |
| Personal & Repair Services | 13,237        | 13,006         | 9,531          | 9,349         | 8,419         | 7,678         | 8,795         | 9,306         | 9,780          | 9,707          |
| <b>TOTAL</b>               | <b>97,159</b> | <b>103,508</b> | <b>101,505</b> | <b>93,375</b> | <b>95,599</b> | <b>95,006</b> | <b>96,033</b> | <b>98,294</b> | <b>102,253</b> | <b>103,443</b> |

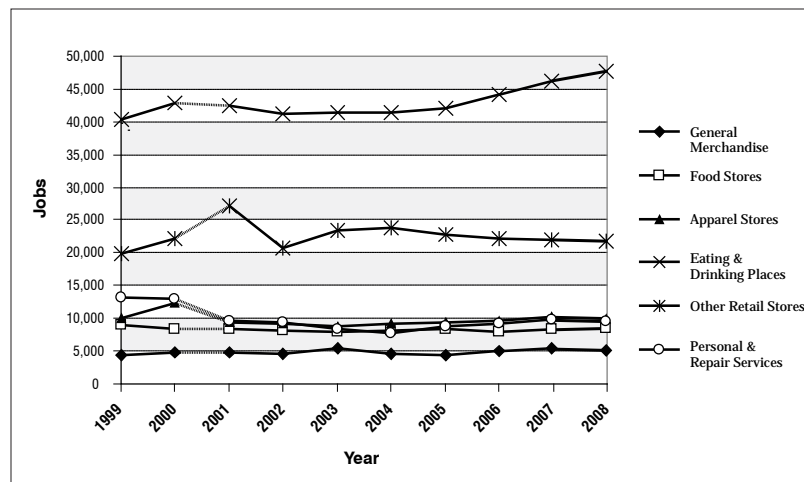
Annual Percentage Distribution

| Industry Group             | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|----------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| General Merchandise        | 4.5          | 4.6          | 4.7          | 5.0          | 5.8          | 4.9          | 4.6          | 5.0          | 5.4          | 5.2          |
| Food Stores                | 9.3          | 8.2          | 8.2          | 8.8          | 8.4          | 8.6          | 8.7          | 8.1          | 8.2          | 8.4          |
| Apparel Stores             | 10.4         | 11.8         | 9.2          | 9.9          | 9.3          | 9.8          | 9.9          | 9.9          | 10.1         | 9.8          |
| Eating & Drinking Places   | 41.7         | 41.4         | 41.8         | 44.1         | 43.3         | 43.6         | 43.9         | 44.9         | 45.2         | 46.1         |
| Other Retail Stores        | 20.5         | 21.4         | 26.8         | 22.2         | 24.4         | 25.1         | 23.7         | 22.6         | 21.5         | 21.2         |
| Personal & Repair Services | 13.6         | 12.6         | 9.4          | 10.0         | 8.8          | 8.1          | 9.2          | 9.5          | 9.6          | 9.4          |
| <b>TOTAL</b>               | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

Percentage Change

| Industry Group             | 1999-00    | 2000-01    | 2001-02     | 2002-03    | 2003-04     | 2004-05    | 2005-06    | 2006-07    | 2007-08    |
|----------------------------|------------|------------|-------------|------------|-------------|------------|------------|------------|------------|
| General Merchandise        | 9.8        | N/A        | -2.2        | 19.7       | -15.9       | -5.6       | 11.8       | 11.5       | -2.7       |
| Food Stores                | -6.6       | N/A        | -1.2        | -1.9       | 1.2         | 3.1        | -5.4       | 5.6        | 3.7        |
| Apparel Stores             | 21.0       | N/A        | -1.5        | -3.7       | 4.7         | 2.4        | 2.0        | 6.3        | -1.9       |
| Eating & Drinking Places   | 5.8        | N/A        | -2.8        | 0.3        | 0.0         | 1.8        | 4.9        | 4.7        | 3.0        |
| Other Retail Stores        | 11.5       | N/A        | -23.6       | 12.5       | 2.2         | -4.5       | -2.4       | -1.0       | -0.5       |
| Personal & Repair Services | -1.7       | N/A        | -1.9        | -9.9       | -8.8        | 14.6       | 5.8        | 5.1        | -0.7       |
| <b>TOTAL</b>               | <b>6.5</b> | <b>N/A</b> | <b>-8.0</b> | <b>2.4</b> | <b>-0.6</b> | <b>1.1</b> | <b>2.4</b> | <b>4.0</b> | <b>1.2</b> |

**FIGURE 3.2.2 RETAIL EMPLOYMENT BY INDUSTRY GROUP, 1999-2008**



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 PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT  
BY INDUSTRY GROUP, 1999-2008**

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

## Annual Average Number of Jobs

| Industry Group        | 1999           | 2000           | 2001           | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          |
|-----------------------|----------------|----------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Construction          | 17,557         | 18,812         | 19,803         | 18,449        | 18,085        | 17,527        | 16,615        | 17,397        | 19,415        | 19,630        |
| Transportation        | 24,081         | 25,313         | 25,118         | 22,170        | 21,653        | 21,099        | 20,222        | 19,204        | 19,071        | 17,484        |
| Utilities             | 11,816         | 11,401         | 10,548         | 10,624        | 10,311        | 10,517        | 10,503        | 9,541         | 7,061         | 7,837         |
| Information           | 11,861         | 12,101         | 10,897         | 10,603        | 9,415         | 8,226         | 6,930         | 6,189         | 8,350         | 8,359         |
| Wholesale             | 20,855         | 20,263         | 13,872         | 12,792        | 12,754        | 12,306        | 12,087        | 11,729        | 12,274        | 12,377        |
| Food Manufacturing    | 2,982          | 2,898          | 3,025          | 2,615         | 2,607         | 2,533         | 2,572         | 2,052         | 1,974         | 2,008         |
| Apparel Manufacturing | 12,197         | 10,574         | 6,220          | 5,396         | 4,779         | 4,256         | 3,387         | 3,172         | 2,864         | 2,426         |
| Printing & Publishing | 8,420          | 8,724          | 9,424          | 8,413         | 7,960         | 7,804         | 7,494         | 7,419         | 7,738         | 7,379         |
| Other Manufacturing   | 7,819          | 6,452          | 8,931          | 6,411         | 6,171         | 4,747         | 4,815         | 4,921         | 6,050         | 5,626         |
| <b>TOTAL</b>          | <b>117,588</b> | <b>116,540</b> | <b>107,837</b> | <b>97,473</b> | <b>93,735</b> | <b>89,014</b> | <b>84,623</b> | <b>81,625</b> | <b>84,796</b> | <b>83,125</b> |

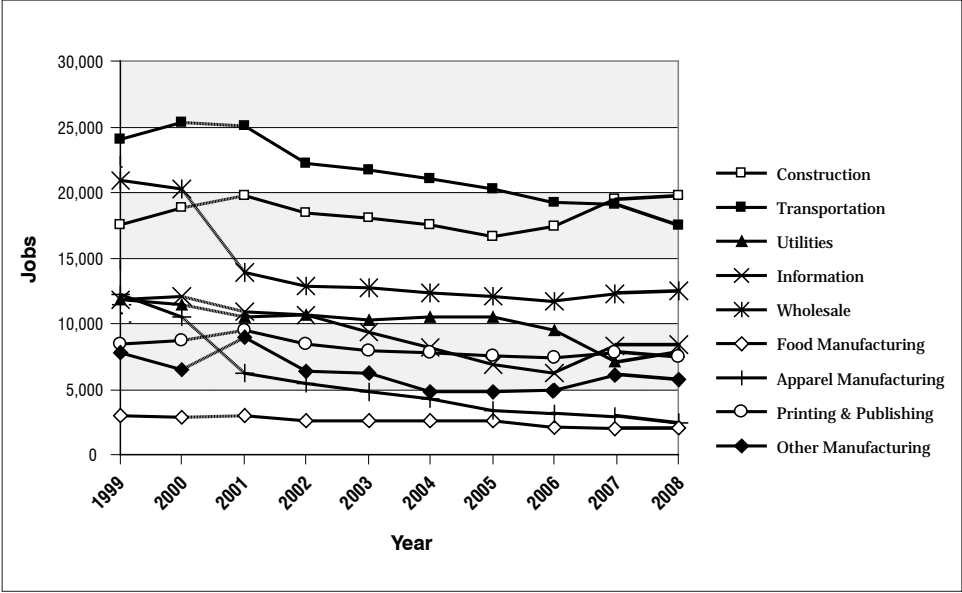
## Annual Percentage Distribution

| Industry Group        | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Construction          | 14.9         | 16.1         | 18.4         | 18.9         | 19.3         | 19.7         | 19.6         | 21.3         | 22.9         | 23.6         |
| Transportation        | 20.5         | 21.7         | 23.3         | 22.7         | 23.1         | 23.7         | 23.9         | 23.5         | 22.5         | 21.0         |
| Utilities             | 10.0         | 9.8          | 9.8          | 10.9         | 11.0         | 11.8         | 12.4         | 11.7         | 8.3          | 9.4          |
| Information           | 10.1         | 10.4         | 10.1         | 10.9         | 10.0         | 9.2          | 8.2          | 7.6          | 9.8          | 10.1         |
| Wholesale             | 17.7         | 17.4         | 12.9         | 13.1         | 13.6         | 13.8         | 14.3         | 14.4         | 14.5         | 14.9         |
| Food Manufacturing    | 2.5          | 2.5          | 2.8          | 2.7          | 2.8          | 2.8          | 3.0          | 2.5          | 2.3          | 2.4          |
| Apparel Manufacturing | 10.4         | 9.1          | 5.8          | 5.5          | 5.1          | 4.8          | 4.0          | 3.9          | 3.4          | 2.9          |
| Printing & Publishing | 7.2          | 7.5          | 8.7          | 8.6          | 8.5          | 8.8          | 8.9          | 9.1          | 9.1          | 8.9          |
| Other Manufacturing   | 6.6          | 5.5          | 8.3          | 6.6          | 6.6          | 5.3          | 5.7          | 6.0          | 7.1          | 6.8          |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Industry Group        | 1999-00     | 2000-01    | 2001-02     | 2002-03     | 2003-04     | 2004-05     | 2005-06     | 2006-07    | 2007-08     |
|-----------------------|-------------|------------|-------------|-------------|-------------|-------------|-------------|------------|-------------|
| Construction          | 7.1         | N/A        | -6.8        | -2.0        | -3.1        | -5.2        | 4.7         | 11.6       | 1.1         |
| Transportation        | 5.1         | N/A        | -11.7       | -2.3        | -2.6        | -4.2        | -5.0        | -0.7       | -8.3        |
| Utilities             | -3.5        | N/A        | 0.7         | -2.9        | 2.0         | -0.1        | -9.2        | -26.0      | 11.0        |
| Information           | 2.0         | N/A        | -2.7        | -11.2       | -12.6       | -15.8       | -10.7       | 34.9       | 0.1         |
| Wholesale             | -2.8        | N/A        | -7.8        | -0.3        | -3.5        | -1.7        | -3.0        | 4.6        | 0.8         |
| Food Manufacturing    | -2.8        | N/A        | -13.6       | -0.3        | -2.9        | 1.6         | -20.2       | -3.8       | 1.7         |
| Apparel Manufacturing | -13.3       | N/A        | -13.2       | -11.4       | -10.9       | -20.4       | -6.4        | -9.7       | -15.3       |
| Printing & Publishing | 3.6         | N/A        | -10.7       | -5.4        | -2.0        | -4.0        | -1.0        | 4.3        | -4.6        |
| Other Manufacturing   | -17.5       | N/A        | -28.2       | -3.7        | -23.1       | 1.4         | 2.2         | 22.9       | -7.0        |
| <b>TOTAL</b>          | <b>-0.9</b> | <b>N/A</b> | <b>-9.6</b> | <b>-3.8</b> | <b>-5.0</b> | <b>-4.9</b> | <b>-3.5</b> | <b>3.9</b> | <b>-2.0</b> |

**FIGURE 3.2.3** PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 1999-2008



**Notes:**

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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       | 1999           | 2000           | 2001           | 2002           | 2003           | 2004           | 2005           | 2006           | 2007           | 2008           |
|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Art & Recreation     | 14,703         | 15,391         | 10,983         | 10,531         | 10,179         | 10,253         | 10,006         | 9,875          | 10,645         | 10,477         |
| Health Care          | 36,193         | 33,011         | 33,766         | 34,190         | 34,336         | 35,720         | 36,222         | 36,910         | 37,530         | 36,995         |
| Educational Services | 40,988         | 41,779         | 41,697         | 42,587         | 44,145         | 45,529         | 46,507         | 48,539         | 50,732         | 52,424         |
| Social Assistance    | 15,659         | 15,915         | 10,658         | 10,788         | 10,854         | 10,964         | 10,439         | 9,876          | 10,138         | 11,117         |
| Other CIE Services   | 20,068         | 19,970         | 25,118         | 24,158         | 25,369         | 25,495         | 25,553         | 25,446         | 26,316         | 30,835         |
| <b>TOTAL</b>         | <b>127,611</b> | <b>126,066</b> | <b>122,222</b> | <b>122,254</b> | <b>124,882</b> | <b>127,962</b> | <b>128,726</b> | <b>130,645</b> | <b>135,361</b> | <b>141,848</b> |

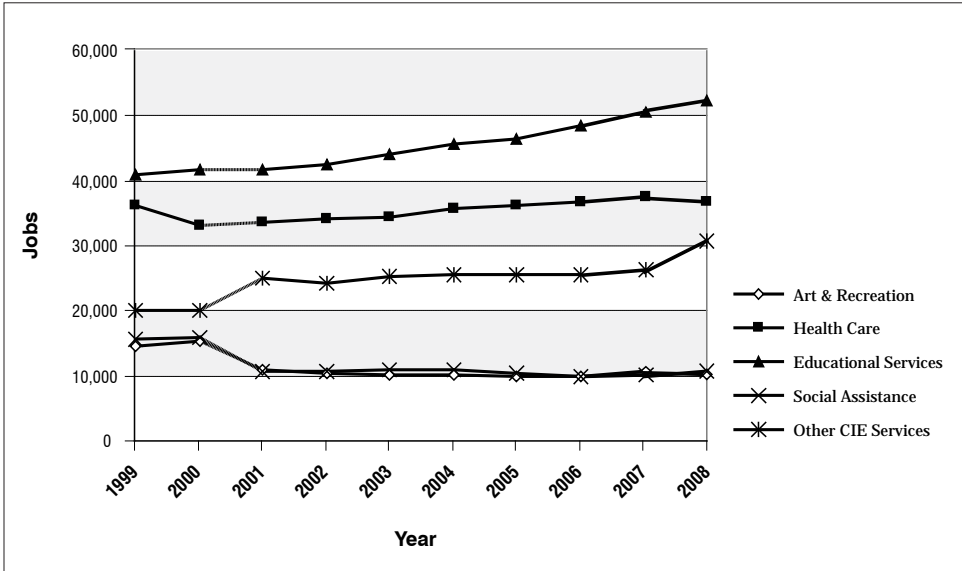
**Annual Percentage Distribution**

| Industry Group       | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Art & Recreation     | 11.5         | 12.2         | 9.0          | 8.6          | 8.2          | 8.0          | 7.8          | 7.6          | 7.9          | 7.4          |
| Health Care          | 28.4         | 26.2         | 27.6         | 28.0         | 27.5         | 27.9         | 28.1         | 28.3         | 27.7         | 26.1         |
| Educational Services | 32.1         | 33.1         | 34.1         | 34.8         | 35.3         | 35.6         | 36.1         | 37.2         | 37.5         | 37.0         |
| Social Assistance    | 12.3         | 12.6         | 8.7          | 8.8          | 8.7          | 8.6          | 8.1          | 7.6          | 7.5          | 7.8          |
| Other CIE Services   | 15.7         | 15.8         | 20.6         | 19.8         | 20.3         | 19.9         | 19.9         | 19.5         | 19.4         | 21.7         |
| <b>TOTAL</b>         | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

**Percentage Change**

| Industry Group       | 1999-00     | 2000-01    | 2001-02    | 2002-03    | 2003-04    | 2004-05    | 2005-06    | 2006-07    | 2007-08    |
|----------------------|-------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Art & Recreation     | 4.7         | N/A        | -4.1       | -3.3       | 0.7        | -2.4       | -1.3       | 7.8        | -1.6       |
| Health Care          | -8.8        | N/A        | 1.3        | 0.4        | 4.0        | 1.4        | 1.9        | 1.7        | -1.4       |
| Educational Services | 1.9         | N/A        | 2.1        | 3.7        | 3.1        | 2.1        | 4.4        | 4.5        | 3.3        |
| Social Assistance    | 1.6         | N/A        | 1.2        | 0.6        | 1.0        | -4.8       | -5.4       | 2.6        | 9.7        |
| Other CIE Services   | -0.5        | N/A        | -3.8       | 5.0        | 0.5        | 0.2        | -0.4       | 3.4        | 17.2       |
| <b>TOTAL</b>         | <b>-1.2</b> | <b>N/A</b> | <b>0.0</b> | <b>2.1</b> | <b>2.5</b> | <b>0.6</b> | <b>1.5</b> | <b>3.6</b> | <b>4.8</b> |

**FIGURE 3.2.4** CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT BY INDUSTRY GROUP, 1999-2008



- 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, 2008**

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

## Employment by Land Use Category and C&amp;I District

| C&I District    | Office         | Retail         | PDR           | Hotel         | CIE            | Other         | Private Households* | Total          |
|-----------------|----------------|----------------|---------------|---------------|----------------|---------------|---------------------|----------------|
| Bayview         | 1,803          | 2,360          | 14,043        | -             | 1,003          | 819           | 778                 | <b>20,028</b>  |
| Civic Center    | 15,759         | 9,507          | 1,176         | 4,965         | 14,489         | 1,216         | 1,139               | <b>47,110</b>  |
| Financial       | 120,157        | 18,183         | 21,709        | 7,150         | 12,440         | 1,602         | 1,171               | <b>181,241</b> |
| Mission         | 2,721          | 5,281          | 3,770         | 17            | 2,586          | 1,306         | 1,197               | <b>17,153</b>  |
| North Beach     | 3,365          | 8,162          | 1,550         | 1,351         | 2,856          | 1,036         | 927                 | <b>18,320</b>  |
| North Central   | 5,532          | 10,325         | 1,325         | 614           | 41,075         | 2,318         | 2,081               | <b>61,189</b>  |
| Northwest       | 3,971          | 5,990          | 2,618         | 57            | 8,919          | 1,798         | 1,632               | <b>23,353</b>  |
| South of Market | 49,588         | 21,747         | 29,867        | 3,813         | 16,655         | 2,051         | 1,744               | <b>123,720</b> |
| Southwest       | 8,343          | 13,861         | 5,024         | 96            | 17,030         | 4,565         | 4,135               | <b>48,917</b>  |
| Van Ness        | 3,975          | 5,507          | 1,432         | 1,238         | 5,345          | 1,260         | 1,178               | <b>18,757</b>  |
| Unclassified    | 6,037          | 2,519          | 2,195         | 16            | 1,681          | 398           | 357                 | <b>12,846</b>  |
| <b>TOTAL</b>    | <b>221,250</b> | <b>103,442</b> | <b>84,707</b> | <b>19,318</b> | <b>125,510</b> | <b>18,407</b> | <i>16,338</i>       | <b>572,635</b> |

## Percentage Distribution by Commerce and Industry District

| C&I District    | Office       | Retail       | PDR          | Hotel        | CIE          | Other        | Private Households* | Total        |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------|--------------|
| Bayview         | 0.8          | 2.3          | 16.6         | 0.0          | 0.8          | 4.4          | 4.8                 | <b>3.5</b>   |
| Civic Center    | 7.1          | 9.2          | 1.4          | 25.7         | 11.5         | 6.6          | 7.0                 | <b>8.2</b>   |
| Financial       | 54.3         | 17.6         | 25.6         | 37.0         | 9.9          | 8.7          | 7.2                 | <b>31.7</b>  |
| Mission         | 1.2          | 5.1          | 4.5          | 0.1          | 3.4          | 5.8          | 5.7                 | <b>3.0</b>   |
| North Beach     | 1.5          | 7.9          | 1.8          | 7.0          | 2.1          | 7.1          | 7.3                 | <b>3.2</b>   |
| North Central   | 2.5          | 10.0         | 1.6          | 3.2          | 32.7         | 12.6         | 12.7                | <b>10.7</b>  |
| Northwest       | 1.8          | 5.8          | 3.1          | 0.3          | 7.1          | 9.8          | 10.0                | <b>4.1</b>   |
| South of Market | 22.4         | 21.0         | 35.3         | 19.7         | 13.3         | 11.1         | 10.7                | <b>21.6</b>  |
| Southwest       | 3.8          | 13.4         | 5.9          | 0.5          | 13.6         | 24.8         | 25.3                | <b>8.5</b>   |
| Van Ness        | 1.8          | 5.3          | 1.7          | 6.4          | 4.3          | 6.8          | 7.2                 | <b>3.3</b>   |
| Unclassified    | 2.7          | 2.4          | 2.6          | 0.1          | 1.3          | 2.2          | 2.2                 | <b>2.2</b>   |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <i>100.0</i>        | <b>100.0</b> |

CONTINUED &gt;

## Percentage Distribution by Land Use Category

| C&I District    | Office      | Retail      | PDR         | Hotel      | CIE         | Other      | Private Households* | Total        |
|-----------------|-------------|-------------|-------------|------------|-------------|------------|---------------------|--------------|
| Bayview         | 9.0         | 11.8        | 70.1        | 0.0        | 5.0         | 4.1        | 3.9                 | 100.0        |
| Civic Center    | 33.5        | 20.2        | 2.5         | 10.5       | 30.8        | 2.6        | 2.4                 | 100.0        |
| Financial       | 66.3        | 10.0        | 12.0        | 3.9        | 6.9         | 0.9        | 0.6                 | 100.0        |
| Mission         | 15.9        | 30.8        | 22.0        | 0.1        | 25.0        | 6.3        | 5.4                 | 100.0        |
| North Beach     | 18.4        | 44.6        | 8.5         | 7.4        | 14.1        | 7.1        | 6.5                 | 100.0        |
| North Central   | 9.0         | 16.9        | 2.2         | 1.0        | 67.1        | 3.8        | 3.4                 | 100.0        |
| Northwest       | 17.0        | 25.6        | 11.2        | 0.2        | 38.2        | 7.7        | 7.0                 | 100.0        |
| South of Market | 40.1        | 17.6        | 24.1        | 3.1        | 13.5        | 1.7        | 1.4                 | 100.0        |
| Southwest       | 17.1        | 28.3        | 10.3        | 0.2        | 34.8        | 9.3        | 8.5                 | 100.0        |
| Van Ness        | 21.2        | 29.4        | 7.6         | 6.6        | 28.5        | 6.7        | 6.3                 | 100.0        |
| Unclassified    | 47.0        | 19.6        | 17.1        | 0.1        | 13.1        | 3.1        | 2.8                 | 100.0        |
| <b>TOTAL</b>    | <b>38.6</b> | <b>18.1</b> | <b>14.8</b> | <b>3.4</b> | <b>21.9</b> | <b>3.2</b> | <b>2.9</b>          | <b>100.0</b> |

**Notes:**

- Private households (NAICS 814) are a subset of Other and were previously counted under the CIE land use category.
- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- 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.
- CIE employment numbers within each C & I district are lower for 2008 than in previous years due to the shifting of NAICS 814 (Private Households) from CIE to Other.

**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 also 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, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 - Data Formats.

Table 4.1 shows establishment data by Land Use Category from 2002 to 2008. 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 2008. Tables 4.3 and 4.4 present San Francisco establishments for 2008 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 number of establishments for whom the geographical location is not known. These have been placed under an Unclassified category. This category includes home-based business establishments and organizations, such as cooks, maids, butlers, private caregivers and outside workers, such as gardeners, caretakers, and other maintenance workers. These groups do not register a physical address with the State and thus cannot be classified under a specific geographic district.

However, the number of Unclassified establishments in this year's Inventory is substantially lower than in previous years due to more accurate address reporting.



## Establishments by Land Use Category

- *Table 4.1 San Francisco Establishments by Land Use Category, 2002-2008* — The number of establishments in San Francisco were at their highest level in seven years. The number of establishments increased in 2008 for the third year in a row. In addition, increases in CIE establishments more than offset establishment declines in the PDR and Hotel land use categories.
- *Table 4.2.1 Office Establishments by Industry Groups, 2002-2008* — Within Office establishments, the number of Office Services and Public Administration firms increased while all other Office industry groups showed a decrease in numbers. Overall, the number of Office establishments was higher by 1%.
- *Table 4.2.2 Retail Establishments by Industry Groups, 2002-2008* — Retail establishments increased in 2008 by 1.1% with all industry groups except Food Stores reporting higher numbers.
- *Table 4.2.3 PDR Establishments by Industry Groups, 2002-2008* — Overall, PDR establishments decreased slightly in 2008 (-0.6%). All PDR groups with the exception of Transportation and Wholesale experienced a loss in the number of firms.
- *Table 4.2.4 Cultural/Institutional/Educational Establishments by Industry Group, 2002-2008* — Overall the number CIE establishments continued to grow, increasing by close to 22%. Within CIE establishments, the source of the continued growth in both quantity and share comes from Other CIE Services, which largely consists of personal services in private households.

## Establishments by Geographic District

- *Table 4.3 Establishments by Commerce and Industry District and Land Use Category, 2008* — Over 40% of all establishments are private household establishments, a subset of the Other land use category, representing jobs that are home based and are geographically spread citywide. When comparing the 2008 geographic distribution with previous Inventory reports, it should be noted that establishments previously categorized in the Unclassified Commerce and Industry district under CIE have been redistributed to the other C&I districts under the Other land use category, due to more accurate address reporting. Accordingly, the Southwest geographic area contains the largest number of establishments in 2008. 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, 2008* — The vast majority of businesses (72%) have four or fewer employees. Almost a quarter of these small establishments are in the Southwest Commerce and Industry district since this is where most of the home based businesses are. Larger firms, with 50 employees or more are concentrated in the Financial and South of Market districts.

**TABLE 4.1 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2008**

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 2002-2008. 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 2008) and 4.1.2 (a look at seven-year trends).

**Number of Establishments**

| Land Use Category | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Office            | 11,873        | 11,314        | 10,983        | 10,778        | 11,280        | 11,179        | 11,292        |
| Retail            | 7,805         | 7,761         | 7,651         | 7,450         | 7,517         | 7,395         | 7,473         |
| PDR               | 5,341         | 5,122         | 4,984         | 4,826         | 4,847         | 4,839         | 4,812         |
| Hotel             | 324           | 339           | 329           | 320           | 311           | 291           | 288           |
| CIE               | 17,484        | 18,671        | 19,189        | 19,418        | 20,172        | 20,466        | 24,888        |
| <b>TOTAL</b>      | <b>42,992</b> | <b>43,272</b> | <b>43,201</b> | <b>42,855</b> | <b>44,190</b> | <b>44,414</b> | <b>48,753</b> |

**Annual Percentage Distribution**

| Land Use Category | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 27.6         | 26.1         | 25.4         | 25.1         | 25.5         | 25.2         | 23.2         |
| Retail            | 18.2         | 17.9         | 17.7         | 17.4         | 17.0         | 16.7         | 15.3         |
| PDR               | 12.4         | 11.8         | 11.5         | 11.3         | 11.0         | 10.9         | 9.9          |
| Hotel             | 0.8          | 0.8          | 0.8          | 0.7          | 0.7          | 0.7          | 0.6          |
| CIE               | 40.7         | 43.1         | 44.4         | 45.3         | 45.6         | 46.1         | 51.0         |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

**Percentage Change**

| Land Use Category | 2002-03    | 2003-04     | 2004-05     | 2005-06    | 2006-07    | 2007-08    |
|-------------------|------------|-------------|-------------|------------|------------|------------|
| Office            | -4.7       | -2.9        | -1.9        | 4.7        | -0.9       | 1.0        |
| Retail            | -0.6       | -1.4        | -2.6        | 0.9        | -1.6       | 1.1        |
| PDR               | -4.1       | -2.7        | -3.2        | 0.4        | -0.2       | -0.6       |
| Hotel             | 4.6        | -2.9        | -2.7        | -2.8       | -6.4       | -1.0       |
| CIE               | 6.8        | 2.8         | 1.2         | 3.9        | 1.5        | 21.6       |
| <b>TOTAL</b>      | <b>0.7</b> | <b>-0.2</b> | <b>-0.8</b> | <b>3.1</b> | <b>0.5</b> | <b>9.8</b> |

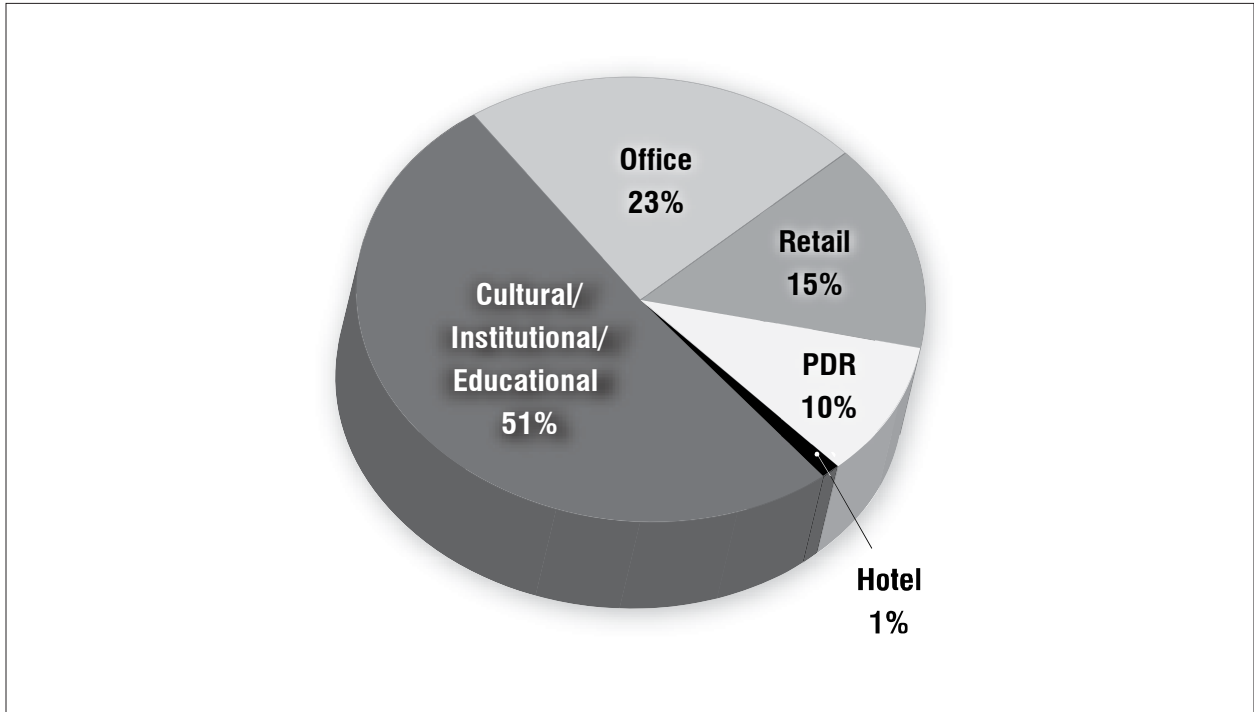
**Notes:**

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Totals also include some unclassified land uses

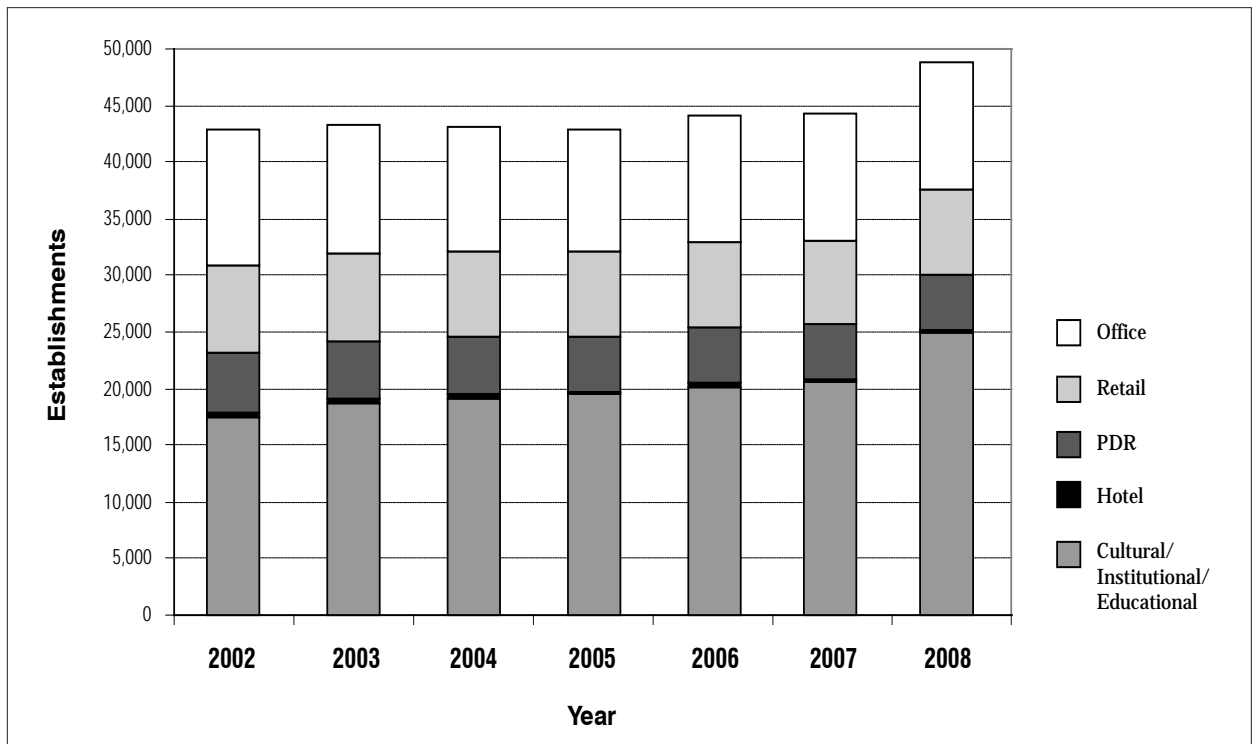
**Sources:**

- 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, 2008



**FIGURE 4.1.2** SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2008



**TABLE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008**

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          | 2008          |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Agriculture           | 29            | 42            | 41            | 38            | 37            | 36            | 34            |
| Finance               | 1,494         | 1,485         | 1,455         | 1,438         | 1,464         | 1,455         | 1,436         |
| Insurance             | 586           | 579           | 558           | 547           | 552           | 559           | 537           |
| Real Estate           | 1,447         | 1,426         | 1,404         | 1,418         | 1,472         | 1,443         | 1,393         |
| Office Services       | 7,913         | 7,384         | 7,132         | 6,937         | 7,371         | 7,297         | 7,343         |
| Public Administration | 396           | 393           | 394           | 401           | 380           | 384           | 540           |
| <b>TOTAL</b>          | <b>11,865</b> | <b>11,307</b> | <b>10,983</b> | <b>10,778</b> | <b>11,275</b> | <b>11,173</b> | <b>11,283</b> |

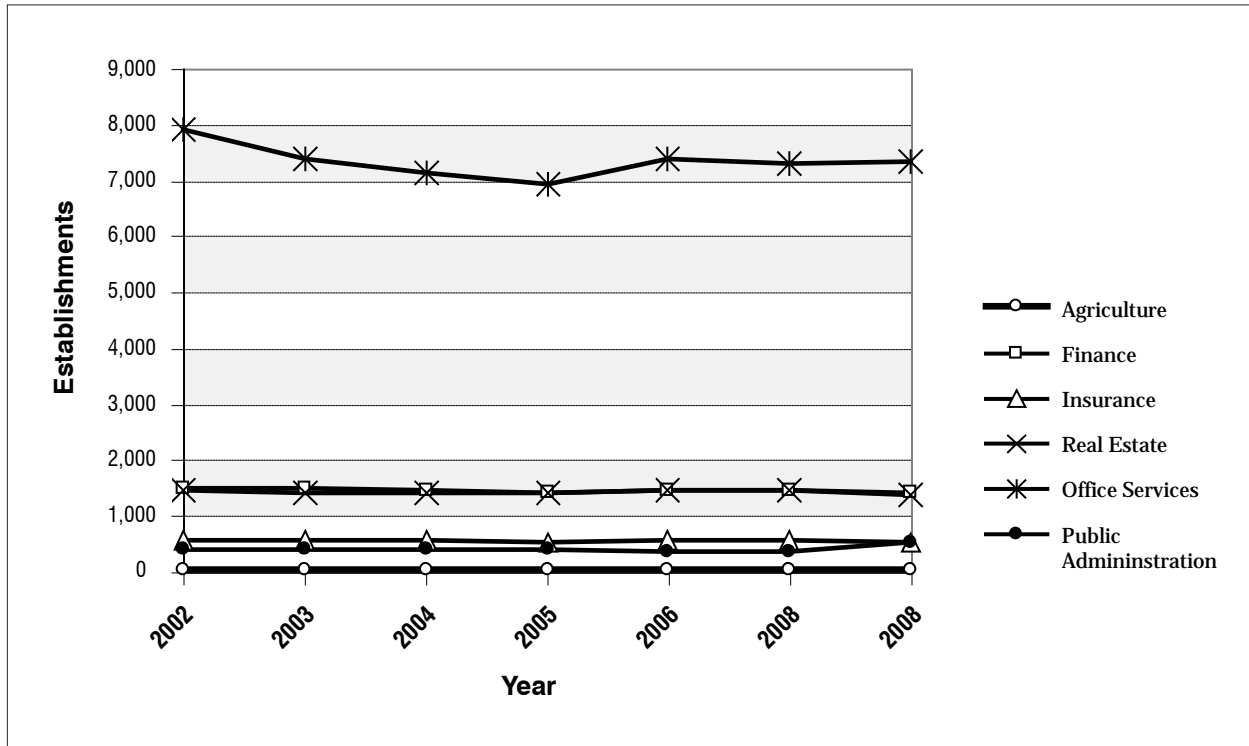
## Annual Percentage Distribution

| Industry Group        | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Agriculture           | 0.2          | 0.4          | 0.4          | 0.4          | 0.3          | 0.3          | 0.3          |
| Finance               | 12.6         | 13.1         | 13.2         | 13.3         | 13.0         | 13.0         | 12.7         |
| Insurance             | 4.9          | 5.1          | 5.1          | 5.1          | 4.9          | 5.0          | 4.8          |
| Real Estate           | 12.2         | 12.6         | 12.8         | 13.2         | 13.1         | 12.9         | 12.3         |
| Office Services       | 66.7         | 65.3         | 64.9         | 64.4         | 65.4         | 65.3         | 65.1         |
| Public Administration | 3.3          | 3.5          | 3.6          | 3.7          | 3.4          | 3.4          | 4.8          |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Industry Group        | 2002-03     | 2003-04     | 2004-05     | 2005-06    | 2006-07     | 2007-08    |
|-----------------------|-------------|-------------|-------------|------------|-------------|------------|
| Agriculture           | 44.8        | -2.4        | -7.9        | -2.6       | -1.4        | -6.2       |
| Finance               | -0.6        | -2.0        | -1.2        | 1.8        | -0.6        | -1.3       |
| Insurance             | -1.2        | -3.6        | -1.9        | 0.9        | 1.2         | -3.8       |
| Real Estate           | -1.5        | -1.5        | 1.0         | 3.8        | -2.0        | -3.4       |
| Office Services       | -6.7        | -3.4        | -2.7        | 6.3        | -1.0        | 0.6        |
| Public Administration | -0.9        | 0.3         | 1.8         | -5.2       | 1.2         | 40.5       |
| <b>TOTAL</b>          | <b>-4.7</b> | <b>-2.9</b> | <b>-1.9</b> | <b>4.6</b> | <b>-0.9</b> | <b>1.0</b> |

FIGURE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008



**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
- Additional calculations by the San Francisco Planning Department

**TABLE 4.2.2 RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008**

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         | 2008         |
|----------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| General Merchandise        | 53           | 55           | 54           | 55           | 69           | 68           | 71           |
| Food Stores                | 615          | 607          | 626          | 629          | 608          | 612          | 594          |
| Apparel Stores             | 712          | 680          | 662          | 654          | 661          | 647          | 650          |
| Eating & Drinking Places   | 2,827        | 2,900        | 2,866        | 2,780        | 2,858        | 2,867        | 2,921        |
| Other Retail Services      | 2,296        | 2,204        | 2,163        | 2,097        | 2,068        | 1,965        | 1,995        |
| Personal & Repair Services | 1,301        | 1,256        | 1,280        | 1,235        | 1,255        | 1,237        | 1,242        |
| <b>TOTAL</b>               | <b>7,805</b> | <b>7,701</b> | <b>7,651</b> | <b>7,450</b> | <b>7,517</b> | <b>7,395</b> | <b>7,473</b> |

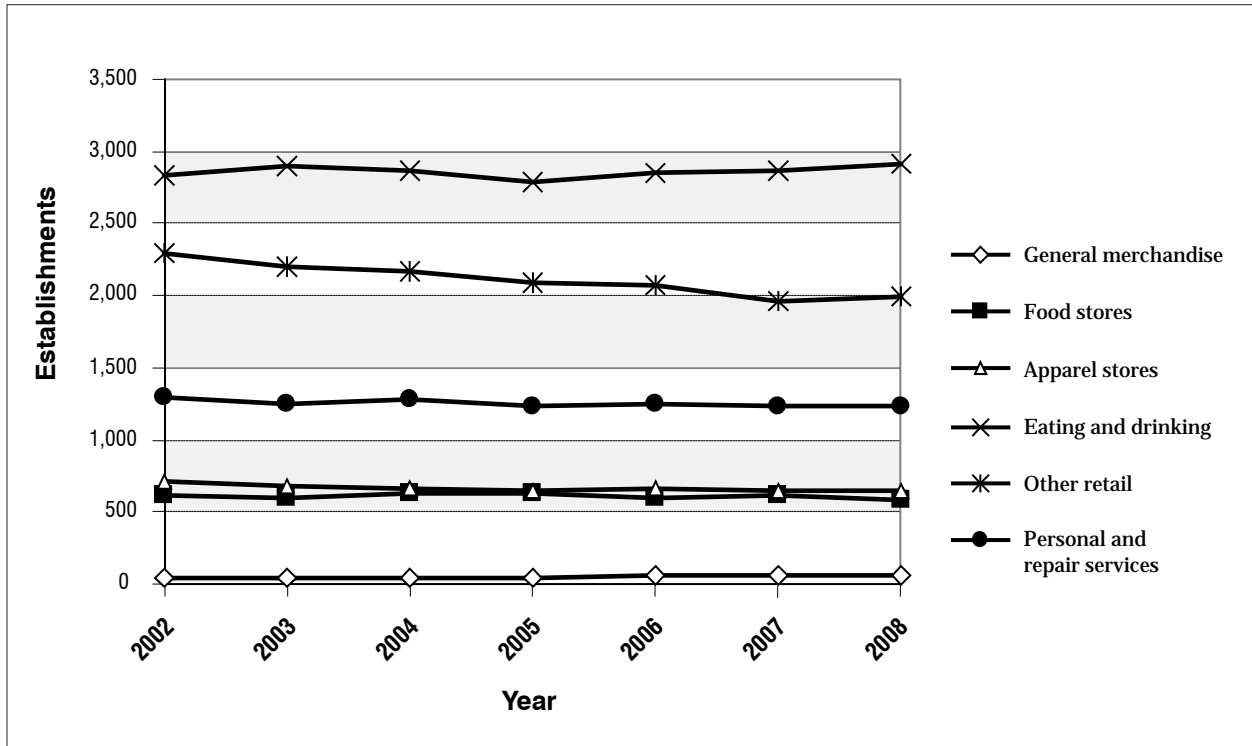
## Annual Percentage Distribution

| Industry Group             | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|----------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| General Merchandise        | 0.7          | 0.7          | 0.7          | 0.7          | 0.9          | 0.9          | 1.0          |
| Food Stores                | 7.9          | 7.9          | 8.2          | 8.4          | 8.1          | 8.3          | 7.9          |
| Apparel Stores             | 9.1          | 8.8          | 8.7          | 8.8          | 8.8          | 8.7          | 8.7          |
| Eating & Drinking Places   | 36.2         | 37.7         | 37.5         | 37.3         | 38.0         | 38.8         | 39.1         |
| Other Retail Services      | 29.4         | 28.6         | 28.3         | 28.2         | 27.5         | 26.6         | 26.7         |
| Personal & Repair Services | 16.7         | 16.3         | 16.7         | 16.6         | 16.7         | 16.7         | 16.6         |
| <b>TOTAL</b>               | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Industry Group             | 2002-03     | 2003-04     | 2004-05     | 2005-06    | 2006-07     | 2007-08    |
|----------------------------|-------------|-------------|-------------|------------|-------------|------------|
| General Merchandise        | 3.3         | -1.8        | 1.9         | 25.1       | -1.1        | 4.8        |
| Food Stores                | -1.4        | 3.1         | 0.6         | -3.4       | 0.6         | -2.9       |
| Apparel Stores             | -4.6        | -2.5        | -1.2        | 1.0        | -2.2        | 0.5        |
| Eating & Drinking Places   | 2.6         | -1.2        | -3.0        | 2.8        | 0.3         | 1.9        |
| Other Retail Services      | -4.0        | -1.9        | -3.0        | -1.4       | -4.9        | 1.5        |
| Personal & Repair Services | -3.5        | 1.9         | -3.5        | 1.6        | -1.4        | 0.4        |
| <b>TOTAL</b>               | <b>-1.3</b> | <b>-0.6</b> | <b>-2.6</b> | <b>0.9</b> | <b>-1.6</b> | <b>1.1</b> |

**FIGURE 4.2.2** RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008



**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
- Additional calculations by the San Francisco Planning Department

**TABLE 4.2.3 PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008**

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

## Number of Establishments

| Industry Group        | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Construction          | 1,722        | 1,697        | 1,678        | 1,647        | 1,708        | 1,687        | 1,676        |
| Transportation        | 562          | 544          | 517          | 527          | 502          | 494          | 503          |
| Utilities             | 22           | 23           | 26           | 26           | 25           | 26           | 25           |
| Information           | 235          | 213          | 202          | 185          | 187          | 249          | 249          |
| Wholesale             | 1,341        | 1,322        | 1,296        | 1,255        | 1,293        | 1,295        | 1,302        |
| Food Manufacturing    | 179          | 168          | 160          | 155          | 152          | 147          | 143          |
| Apparel Manufacturing | 272          | 242          | 226          | 206          | 179          | 168          | 163          |
| Printing & Publishing | 463          | 424          | 406          | 376          | 358          | 358          | 343          |
| Other Manufacturing   | 546          | 490          | 468          | 450          | 446          | 416          | 410          |
| <b>TOTAL</b>          | <b>5,342</b> | <b>5,122</b> | <b>4,978</b> | <b>4,826</b> | <b>4,849</b> | <b>4,839</b> | <b>4,812</b> |

## Annual Percentage Distribution

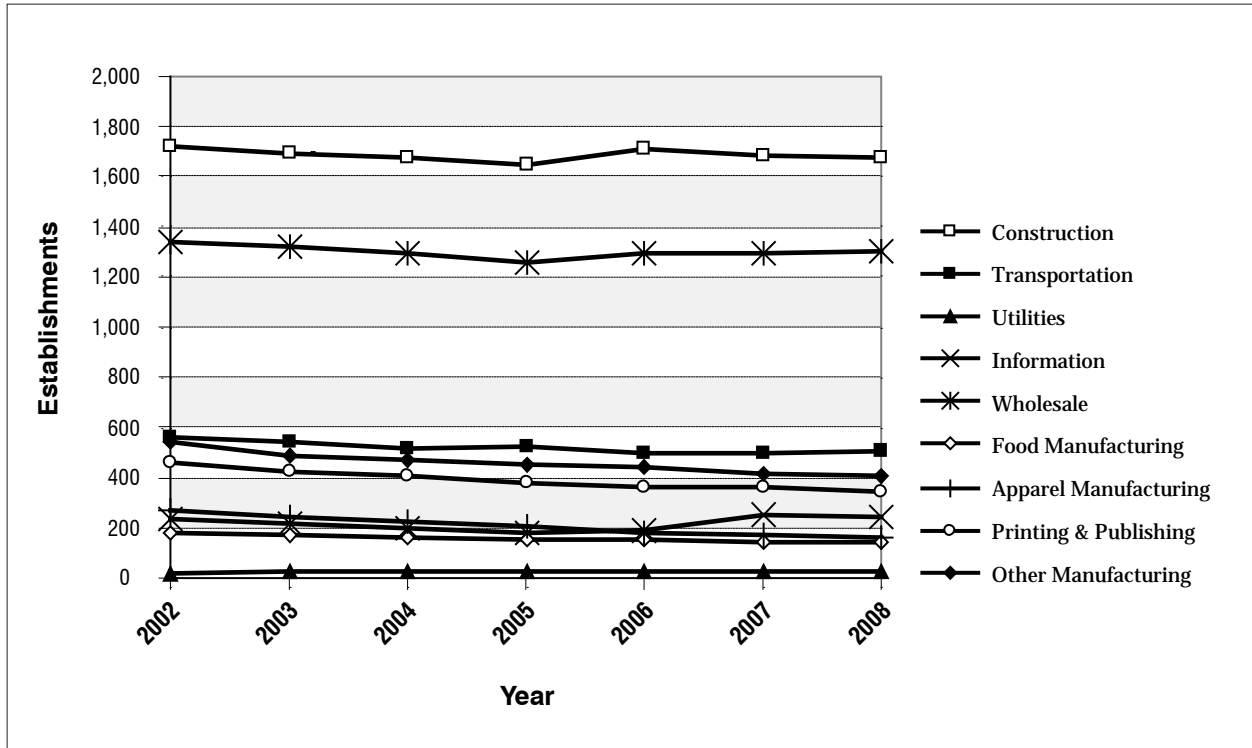
| Industry Group        | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Construction          | 32.2         | 33.1         | 33.7         | 34.1         | 35.2         | 34.9         | 34.8         |
| Transportation        | 10.5         | 10.6         | 10.4         | 10.9         | 10.3         | 10.2         | 10.4         |
| Utilities             | 0.4          | 0.4          | 0.5          | 0.5          | 0.5          | 0.5          | 0.5          |
| Information           | 4.4          | 4.2          | 4.0          | 3.8          | 3.9          | 5.1          | 5.2          |
| Wholesale             | 25.1         | 25.8         | 26.0         | 26.0         | 26.7         | 26.8         | 27.1         |
| Food Manufacturing    | 3.4          | 3.3          | 3.2          | 3.2          | 3.1          | 3.0          | 3.0          |
| Apparel Manufacturing | 5.1          | 4.7          | 4.5          | 4.3          | 3.7          | 3.5          | 3.4          |
| Printing & Publishing | 8.7          | 8.3          | 8.2          | 7.8          | 7.4          | 7.4          | 7.1          |
| Other Manufacturing   | 10.2         | 9.6          | 9.4          | 9.3          | 9.2          | 8.6          | 8.5          |
| <b>TOTAL</b>          | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Industry Group        | 2002-03     | 2003-04     | 2004-05     | 2005-06    | 2006-07     | 2007-08     |
|-----------------------|-------------|-------------|-------------|------------|-------------|-------------|
| Construction          | -1.4        | -1.1        | -1.8        | 3.7        | -1.2        | -0.6        |
| Transportation        | -3.2        | -5.1        | 2.0         | -4.8       | -1.5        | 1.7         |
| Utilities             | 5.0         | 14.3        | 1.0         | -4.8       | 3.0         | -2.9        |
| Information           | -9.4        | -5.4        | -8.2        | 1.1        | 33.2        | -0.2        |
| Wholesale             | -1.4        | -1.9        | -3.2        | 3.1        | 0.2         | 0.5         |
| Food Manufacturing    | -6.1        | -4.6        | -3.1        | -2.1       | -3.1        | -3.2        |
| Apparel Manufacturing | -11.2       | -6.3        | -9.2        | -12.9      | -6.3        | -3.1        |
| Printing & Publishing | -8.4        | -4.2        | -7.5        | -4.7       | 0.1         | -4.3        |
| Other Manufacturing   | -10.3       | -4.5        | -3.7        | -0.9       | -6.8        | -1.3        |
| <b>TOTAL</b>          | <b>-4.1</b> | <b>-2.8</b> | <b>-3.1</b> | <b>0.5</b> | <b>-0.2</b> | <b>-0.6</b> |



**FIGURE 4.2.3** PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008



**Notes:**

- PDR = Production/Distribution/Repair
- 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, 2002-2008**

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          | 2008          |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Art & Recreation     | 425           | 412           | 405           | 402           | 424           | 424           | 416           |
| Health Care          | 2,059         | 2,070         | 2,066         | 2,025         | 2,086         | 2,075         | 2,055         |
| Educational Services | 962           | 972           | 910           | 699           | 699           | 694           | 697           |
| Social Assistance    | 546           | 592           | 595           | 586           | 574           | 590           | 600           |
| Other CIE Services   | 13,491        | 14,625        | 15,209        | 15,706        | 16,389        | 16,684        | 21,122        |
| <b>TOTAL</b>         | <b>17,483</b> | <b>18,671</b> | <b>19,185</b> | <b>19,418</b> | <b>20,172</b> | <b>20,466</b> | <b>24,888</b> |

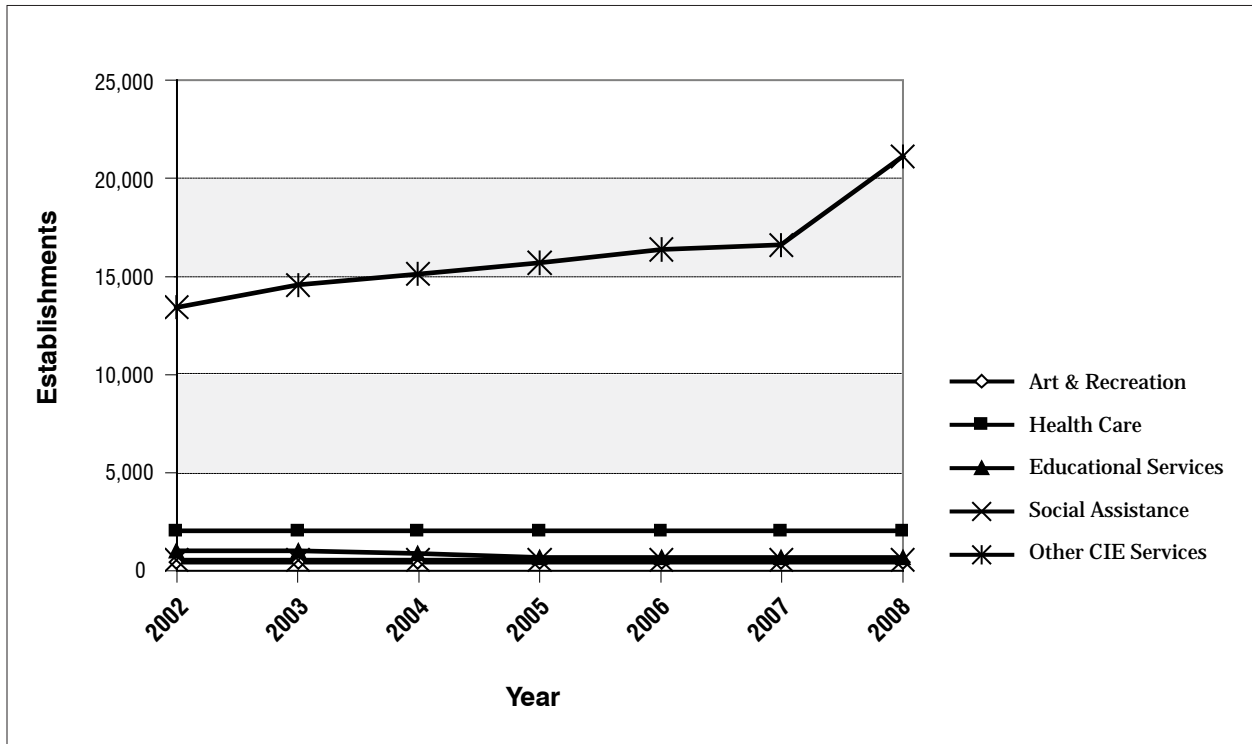
## Annual Percentage Distribution

| Industry Group       | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Art & Recreation     | 2.4          | 2.2          | 2.1          | 2.1          | 2.1          | 2.1          | 1.7          |
| Health Care          | 11.8         | 11.1         | 10.8         | 10.4         | 10.3         | 10.1         | 8.3          |
| Educational Services | 5.5          | 5.2          | 4.7          | 3.6          | 3.5          | 3.4          | 2.8          |
| Social Assistance    | 3.1          | 3.2          | 3.1          | 3.0          | 2.8          | 2.9          | 2.4          |
| Other CIE Services   | 77.2         | 78.3         | 79.3         | 80.9         | 81.2         | 81.5         | 84.9         |
| <b>TOTAL</b>         | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Industry Group       | 2002-03    | 2003-04    | 2004-05    | 2005-06    | 2006-07    | 2007-08     |
|----------------------|------------|------------|------------|------------|------------|-------------|
| Art & Recreation     | -3.1       | -1.7       | -0.7       | 5.5        | -0.1       | -1.8        |
| Health Care          | 0.5        | -0.2       | -2.0       | 3.0        | -0.6       | -1.0        |
| Educational Services | 1.1        | -6.4       | -23.2      | 0.0        | -0.7       | 0.4         |
| Social Assistance    | 8.5        | 0.4        | -1.4       | -2.1       | 2.8        | 1.6         |
| Other CIE Services   | 8.4        | 4.0        | 3.3        | 4.4        | 1.8        | 26.6        |
| <b>TOTAL</b>         | <b>6.8</b> | <b>2.8</b> | <b>1.2</b> | <b>3.9</b> | <b>1.5</b> | <b>21.6</b> |

**FIGURE 4.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008**



**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, 2008**

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

Number of Establishments

| C&I District    | Office        | Retail       | PDR          | Hotel      | CIE          | Other         | Private Households* | TOTAL         |
|-----------------|---------------|--------------|--------------|------------|--------------|---------------|---------------------|---------------|
| Bayview         | 156           | 235          | 675          | 2          | 85           | 1,058         | 1,025               | 2,210         |
| Civic Center    | 784           | 463          | 111          | 54         | 304          | 1,561         | 1,509               | 3,277         |
| Financial       | 4,526         | 1,233        | 730          | 51         | 763          | 1,396         | 1,106               | 8,698         |
| Mission         | 375           | 506          | 286          | 5          | 282          | 1,294         | 1,193               | 2,748         |
| North Beach     | 379           | 517          | 146          | 24         | 137          | 1,440         | 1,378               | 2,644         |
| North Central   | 818           | 910          | 258          | 41         | 672          | 2,483         | 2,290               | 5,182         |
| Northwest       | 534           | 549          | 290          | 7          | 454          | 2,205         | 1,892               | 3,858         |
| South of Market | 1,551         | 1,094        | 1,126        | 34         | 407          | 2,319         | 2,101               | 6,531         |
| Southwest       | 1,301         | 1,353        | 907          | 21         | 1,140        | 5,622         | 5,265               | 10,344        |
| Van Ness        | 532           | 477          | 112          | 44         | 322          | 1,556         | 1,486               | 3,042         |
| Unclassified    | 338           | 137          | 172          | 5          | 91           | 1,025         | 988                 | 1,767         |
| <b>TOTAL</b>    | <b>11,292</b> | <b>7,473</b> | <b>4,812</b> | <b>288</b> | <b>4,657</b> | <b>21,779</b> | <b>20,232</b>       | <b>50,299</b> |

Percentage Distribution by Commerce and Industry District

| C&I District    | Office       | Retail       | PDR          | Hotel        | CIE          | Other        | Private Households* | TOTAL        |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------------|--------------|
| Bayview         | 1.4          | 3.1          | 14.0         | 0.7          | 1.8          | 4.9          | 5.1                 | 4.4          |
| Civic Center    | 6.9          | 6.2          | 2.3          | 18.7         | 6.5          | 7.2          | 7.5                 | 6.5          |
| Financial       | 40.1         | 16.5         | 15.2         | 17.8         | 16.4         | 6.4          | 5.5                 | 17.3         |
| Mission         | 3.3          | 6.8          | 5.9          | 1.7          | 6.1          | 5.9          | 5.9                 | 5.5          |
| North Beach     | 3.4          | 6.9          | 3.0          | 8.4          | 3.0          | 6.6          | 6.8                 | 5.3          |
| North Central   | 7.2          | 12.2         | 5.4          | 14.3         | 14.4         | 11.4         | 11.3                | 10.3         |
| Northwest       | 4.7          | 7.3          | 6.0          | 2.3          | 9.7          | 9.3          | 9.3                 | 7.7          |
| South of Market | 13.7         | 14.6         | 23.4         | 11.9         | 8.7          | 10.6         | 10.4                | 13.0         |
| Southwest       | 11.5         | 18.1         | 18.9         | 7.2          | 24.5         | 25.8         | 26.0                | 20.6         |
| Van Ness        | 4.7          | 6.4          | 2.3          | 15.2         | 6.9          | 7.1          | 7.3                 | 6.0          |
| Unclassified    | 3.0          | 1.8          | 3.6          | 1.7          | 2.0          | 4.7          | 4.9                 | 3.5          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b>        | <b>100.0</b> |

Percentage Distribution by Land Use Category

| C&I District    | Office      | Retail      | PDR        | Hotel      | CIE        | Other       | Private Households* | TOTAL        |
|-----------------|-------------|-------------|------------|------------|------------|-------------|---------------------|--------------|
| Bayview         | 7.1         | 10.6        | 30.5       | 0.1        | 3.8        | 47.9        | 46.4                | 100.0        |
| Civic Center    | 2.9         | 14.1        | 3.4        | 1.6        | 9.3        | 47.7        | 46.1                | 100.0        |
| Financial       | 52.0        | 14.2        | 8.4        | 0.6        | 8.8        | 16.0        | 12.7                | 100.0        |
| Mission         | 13.6        | 18.4        | 10.4       | 0.2        | 10.3       | 47.1        | 43.4                | 100.0        |
| North Beach     | 14.3        | 19.6        | 5.5        | 0.9        | 5.2        | 54.5        | 52.1                | 100.0        |
| North Central   | 15.8        | 17.6        | 5.0        | 0.8        | 13.0       | 47.9        | 44.2                | 100.0        |
| Northwest       | 13.8        | 14.2        | 7.5        | 0.2        | 11.8       | 52.5        | 49.0                | 100.0        |
| South of Market | 23.8        | 16.8        | 17.2       | 0.5        | 6.2        | 35.5        | 32.2                | 100.0        |
| Southwest       | 12.6        | 13.1        | 8.8        | 0.2        | 11.0       | 54.4        | 50.9                | 100.0        |
| Van Ness        | 17.5        | 15.7        | 3.7        | 1.4        | 10.6       | 51.1        | 48.8                | 100.0        |
| Unclassified    | 19.1        | 7.7         | 9.7        | 0.3        | 5.1        | 58.0        | 55.9                | 100.0        |
| <b>TOTAL</b>    | <b>22.5</b> | <b>14.9</b> | <b>9.6</b> | <b>0.6</b> | <b>9.3</b> | <b>43.3</b> | <b>40.2</b>         | <b>100.0</b> |

Notes:

- Private households (NAICS 814) are a subset of Other and were previously counted under the CIE land use category.
- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
- Tables 4.2.1-4.2.4 provide detailed information of various components of Office, Retail, PDR and CIE respectively.
- CIE establishment numbers within each C & I district are lower for 2008 than in previous years due to the shifting of NAICS 814 (Private Households) from CIE to Other.

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, 2008**

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts, by the size of the establishment (see Section 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         | 1,520         | 273          | 212          | 137          | 42         | 24         | 2          | -         | 1         | 2,209         |
| Civic Center    | 2,333         | 320          | 252          | 235          | 73         | 43         | 12         | 5         | 5         | 3,277         |
| Financial       | 4,713         | 1,399        | 1,065        | 841          | 349        | 211        | 77         | 36        | 10        | 8,699         |
| Mission         | 2,076         | 326          | 172          | 119          | 37         | 14         | 3          | 1         | -         | 2,748         |
| North Beach     | 2,038         | 257          | 168          | 113          | 43         | 20         | 4          | 0         | 1         | 2,644         |
| North Central   | 4,029         | 502          | 352          | 194          | 62         | 32         | 3          | 2         | 7         | 5,182         |
| Northwest       | 3,079         | 362          | 237          | 127          | 26         | 17         | 8          | 1         | 2         | 3,858         |
| South of Market | 4,161         | 851          | 673          | 488          | 192        | 103        | 35         | 13        | 15        | 6,531         |
| Southwest       | 8,490         | 919          | 516          | 279          | 89         | 39         | 10         | 2         | 1         | 10,344        |
| Van Ness        | 2,405         | 282          | 169          | 118          | 45         | 20         | 4          | 1         | 1         | 3,042         |
| Unclassified    | 1,426         | 136          | 89           | 65           | 31         | 14         | 5          | 2         | -         | 1,767         |
| <b>TOTAL</b>    | <b>36,270</b> | <b>5,627</b> | <b>3,904</b> | <b>2,713</b> | <b>988</b> | <b>536</b> | <b>162</b> | <b>62</b> | <b>41</b> | <b>50,301</b> |

## Percentage Distribution by C&amp;I District

| C&I District    | 0-4          | 5-9          | 10-19        | 20-49        | 50-99        | 100-249      | 250-499      | 500-999      | 1000+        | TOTAL        |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 4.2          | 4.8          | 5.4          | 5.0          | 4.2          | 4.4          | 0.9          | 0.0          | 2.4          | 4.4          |
| Civic Center    | 6.4          | 5.7          | 6.5          | 8.7          | 7.4          | 8.0          | 7.1          | 7.2          | 11.7         | 6.5          |
| Financial       | 13.0         | 24.9         | 27.3         | 31.0         | 35.3         | 39.3         | 47.5         | 57.2         | 24.0         | 17.3         |
| Mission         | 5.7          | 5.8          | 4.4          | 4.4          | 3.7          | 2.5          | 2.0          | 1.6          | 0.0          | 5.5          |
| North Beach     | 5.6          | 4.6          | 4.3          | 4.2          | 4.3          | 3.8          | 2.7          | 0.5          | 2.0          | 5.3          |
| North Central   | 11.1         | 8.9          | 9.0          | 7.1          | 6.3          | 6.0          | 2.0          | 3.2          | 15.9         | 10.3         |
| Northwest       | 8.5          | 6.4          | 6.1          | 4.7          | 2.7          | 3.1          | 4.6          | 1.6          | 4.9          | 7.7          |
| South of Market | 11.5         | 15.1         | 17.2         | 18.0         | 19.4         | 19.3         | 21.8         | 20.9         | 35.5         | 13.0         |
| Southwest       | 23.4         | 16.3         | 13.2         | 10.3         | 9.0          | 7.3          | 5.9          | 3.7          | 2.4          | 20.6         |
| Van Ness        | 6.6          | 5.0          | 4.3          | 4.3          | 4.5          | 3.6          | 2.3          | 0.8          | 1.2          | 6.0          |
| Unclassified    | 3.9          | 2.4          | 2.3          | 2.4          | 3.1          | 2.7          | 3.1          | 3.2          | 0.0          | 3.5          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## 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         | 68.8        | 12.3        | 9.6        | 6.2        | 1.9        | 1.1        | 0.1        | 0.0        | 0.0        | 100.0        |
| Civic Center    | 71.2        | 9.8         | 7.7        | 7.2        | 2.2        | 1.3        | 0.4        | 0.1        | 0.1        | 100.0        |
| Financial       | 54.2        | 16.1        | 12.2       | 9.7        | 4.0        | 2.4        | 0.9        | 0.4        | 0.1        | 100.0        |
| Mission         | 75.5        | 11.9        | 6.3        | 4.3        | 1.3        | 0.5        | 0.1        | 0.0        | 0.0        | 100.0        |
| North Beach     | 77.1        | 9.7         | 6.4        | 4.3        | 1.6        | 0.8        | 0.2        | 0.0        | 0.0        | 100.0        |
| North Central   | 77.8        | 9.7         | 6.8        | 3.7        | 1.2        | 0.6        | 0.1        | 0.0        | 0.1        | 100.0        |
| Northwest       | 79.8        | 9.4         | 6.1        | 3.3        | 0.7        | 0.4        | 0.2        | 0.0        | 0.1        | 100.0        |
| South of Market | 63.7        | 13.0        | 10.3       | 7.5        | 2.9        | 1.6        | 0.5        | 0.2        | 0.2        | 100.0        |
| Southwest       | 82.1        | 8.9         | 5.0        | 2.7        | 0.9        | 0.4        | 0.1        | 0.0        | 0.0        | 100.0        |
| Van Ness        | 79.1        | 9.3         | 5.5        | 3.9        | 1.5        | 0.6        | 0.1        | 0.0        | 0.0        | 100.0        |
| Unclassified    | 80.7        | 7.7         | 5.0        | 3.6        | 1.7        | 0.8        | 0.3        | 0.1        | 0.0        | 100.0        |
| <b>TOTAL</b>    | <b>72.1</b> | <b>11.2</b> | <b>7.8</b> | <b>5.4</b> | <b>2.0</b> | <b>1.1</b> | <b>0.3</b> | <b>0.1</b> | <b>0.1</b> | <b>100.0</b> |

## Notes:

- Due to rounding, figures may not add to the total shown.
- There are more establishments within each C & I district for 2008 than in previous years due to more accurate address reporting. This is particularly noticeable in the 0-4 size class. These establishments were previously counted in the Unclassified C & I district.

## 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 annual wages, retail sales and permits, and government revenues.

Section 5.1 describes total annual wages received by individuals for work in San Francisco from 1999 to 2008, 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 2008. Section 5.3 reports city government revenues and expenditures in fiscal year 2008 (July 1, 2007 to June 30, 2008). 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 C&I 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 1999 to 2008. 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.

From 1998 through 2000, these were organized according to Standard Industrial Classification System (SIC). Since 2001, Land Use categories are organized according to North American Industry Classification system (NAICS). Both industry classification systems are discussed in Section 1.2 – 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, 1999–2008* — Total annual wages continued to rise in 2008, reaching their highest level since 2000, after adjusting for inflation. This increase in annual wages was highest in Hotel (5%) and CIE (4%).
- *Table 5.1.2 Annual Wages per Worker by Land Use Activity, 1999–2008* — All sectors, except for Hotel workers, saw their wages fall, on average, 2.2%. Office workers by far earned the most, averaging \$115,460 annually in 2008, while Retail workers earned the least at an average of \$31,260.

## 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 2008. 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, 1999–2008* — Taxable sales at Retail Stores decreased slightly in 2008 (-0.2%) 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, 2008* — 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 25% of Retail Stores sales tax permits but 27% of the retail taxable sales. Service Stations have the highest sales per establishment at just over \$5.4 million followed by General Merchandise stores which average almost \$2.9 million.

### 5.3 CITY REVENUES AND EXPENDITURES

Section 5.3 presents San Francisco city government revenues and expenditures for fiscal year 2007-2008. 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 covers 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 2007-08. 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 2008* — Property Taxes and Intergovernmental Transfers were the primary sources of revenue for San Francisco, accounting for 32% and 25% respectively. Other significant sources of San Francisco government revenues were Other Local Taxes (18%) and Business Taxes (11%).
- *Table 5.3.2 San Francisco Government General Expenditures by Function, Fiscal Year 2008* — Public Protection, Human Welfare / Neighborhood Development, and Community Health functions were the largest recipients of San Francisco government expenditures in Fiscal Year 2008 accounting for 26%, 23%, and 15% respectively.



**TABLE 5.1.1 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1999-2008**

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 1999-2008, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1999-2000 data and 2001-2008 data (see Section 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 2008) and 5.1.2 (a look at ten-year trends).

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

| Land Use Category | 1999                | 2000                | 2001                | 2002                | 2003                | 2004                | 2005                | 2006                | 2007                | 2008                |
|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Office            | \$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        | \$25,544,356        |
| Retail            | \$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         | \$3,233,372         |
| PDR               | \$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         | \$6,319,130         |
| Hotel             | \$536,000           | \$557,887           | \$500,105           | \$500,105           | \$538,418           | \$584,876           | \$613,242           | \$671,000           | \$704,872           | \$764,622           |
| CIE               | \$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         | \$7,325,473         |
| <b>TOTAL</b>      | <b>\$31,369,029</b> | <b>\$35,143,450</b> | <b>\$35,880,136</b> | <b>\$32,019,082</b> | <b>\$31,347,821</b> | <b>\$31,977,613</b> | <b>\$34,149,206</b> | <b>\$37,998,504</b> | <b>\$41,805,696</b> | <b>\$43,316,200</b> |

## Inflation-Adjusted (2008 \$ 000s)

| Land Use Category | 1999                | 2000                | 2001                | 2002                | 2003                | 2004                | 2005                | 2006                | 2007                | 2008                |
|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Office            | \$22,932,418        | \$25,975,198        | \$25,416,510        | \$20,517,000        | \$19,275,415        | \$19,381,702        | \$20,897,385        | \$23,715,687        | \$25,520,670        | \$25,544,356        |
| Retail            | \$3,369,304         | \$3,900,799         | \$3,355,923         | \$3,024,431         | \$2,966,684         | \$2,931,387         | \$3,088,298         | \$3,136,245         | \$3,315,420         | \$3,233,372         |
| PDR               | \$8,401,722         | \$8,041,068         | \$7,464,426         | \$6,423,208         | \$6,198,109         | \$6,105,315         | \$6,032,521         | \$6,132,290         | \$6,547,723         | \$6,319,130         |
| Hotel             | \$699,708           | \$698,727           | \$647,029           | \$568,966           | \$602,715           | \$643,388           | \$666,447           | \$715,186           | \$727,946           | \$764,622           |
| CIE               | \$5,545,450         | \$5,398,446         | \$6,108,345         | \$5,889,919         | \$6,048,445         | \$6,114,886         | \$6,424,692         | \$6,800,200         | \$7,040,581         | \$7,325,473         |
| <b>TOTAL</b>      | <b>\$40,949,945</b> | <b>\$44,015,490</b> | <b>\$43,017,933</b> | <b>\$36,427,902</b> | <b>\$35,091,368</b> | <b>\$35,176,677</b> | <b>\$37,112,011</b> | <b>\$40,500,744</b> | <b>\$43,174,173</b> | <b>\$43,316,200</b> |

## Annual Percentage Distribution

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 56.0         | 59.0         | 59.1         | 56.3         | 54.9         | 55.1         | 56.3         | 58.6         | 59.1         | 59.0         |
| Retail            | 8.2          | 8.9          | 7.8          | 8.3          | 8.5          | 8.3          | 8.3          | 7.7          | 7.7          | 7.5          |
| PDR               | 20.5         | 18.3         | 17.4         | 17.6         | 17.7         | 17.4         | 16.3         | 15.1         | 15.2         | 14.6         |
| Hotel             | 1.7          | 1.6          | 1.5          | 1.6          | 1.7          | 1.8          | 1.8          | 1.8          | 1.7          | 1.8          |
| CIE               | 13.5         | 12.3         | 14.2         | 16.2         | 17.2         | 17.4         | 17.3         | 16.8         | 16.3         | 16.9         |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Land Use Category | 1999-00    | 2000-01    | 2001-02      | 2001-02     | 2003-04    | 2004-05    | 2005-06    | 2006-07    | 2007-08    |
|-------------------|------------|------------|--------------|-------------|------------|------------|------------|------------|------------|
| Office            | 13.3       | N/A        | -19.3        | -6.1        | 0.6        | 7.8        | 13.5       | 7.6        | 0.1        |
| Retail            | 15.8       | N/A        | -9.9         | -1.9        | -1.2       | 5.4        | 1.6        | 5.7        | -2.5       |
| PDR               | -4.3       | N/A        | -13.9        | -3.5        | -1.5       | -1.5       | 1.7        | 6.8        | -3.5       |
| Hotel             | -0.1       | N/A        | -12.1        | 5.9         | 6.7        | 3.6        | 7.3        | 1.8        | 5.0        |
| CIE               | -2.7       | N/A        | -3.6         | 2.7         | 1.1        | 5.1        | 5.8        | 3.5        | 4.0        |
| <b>TOTAL</b>      | <b>7.5</b> | <b>N/A</b> | <b>-15.3</b> | <b>-3.7</b> | <b>0.2</b> | <b>5.5</b> | <b>9.1</b> | <b>6.6</b> | <b>0.3</b> |

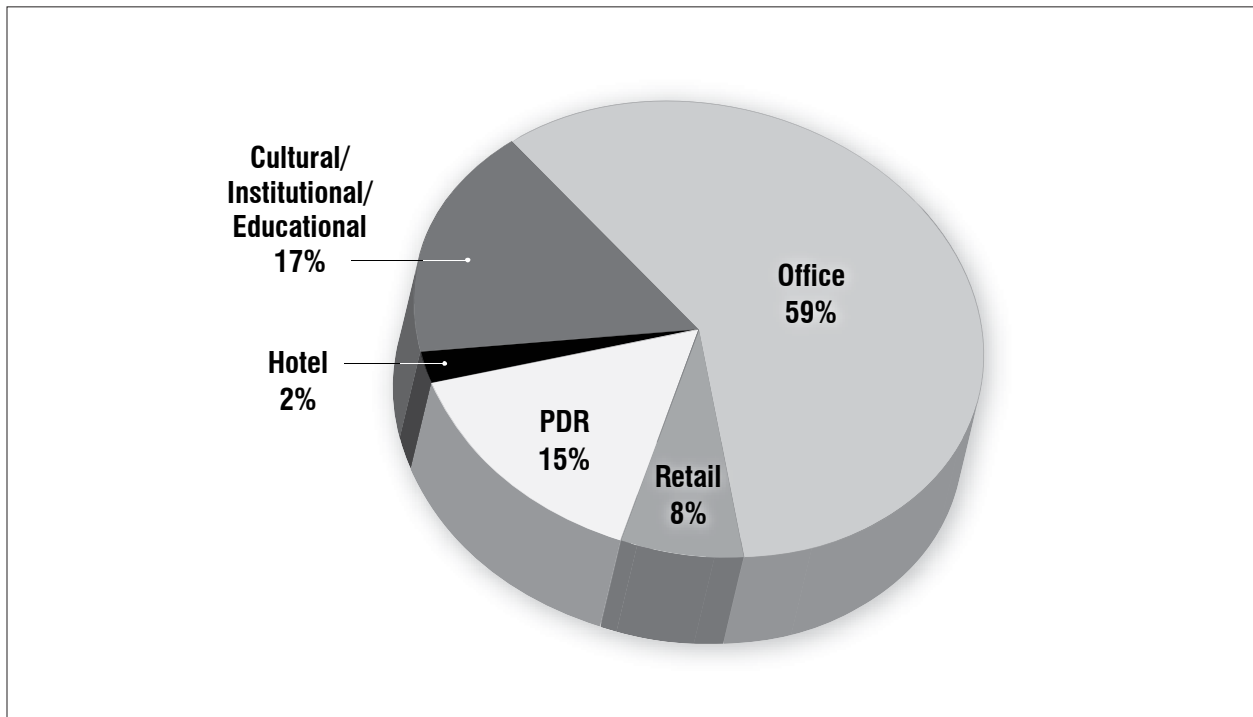
## Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- 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

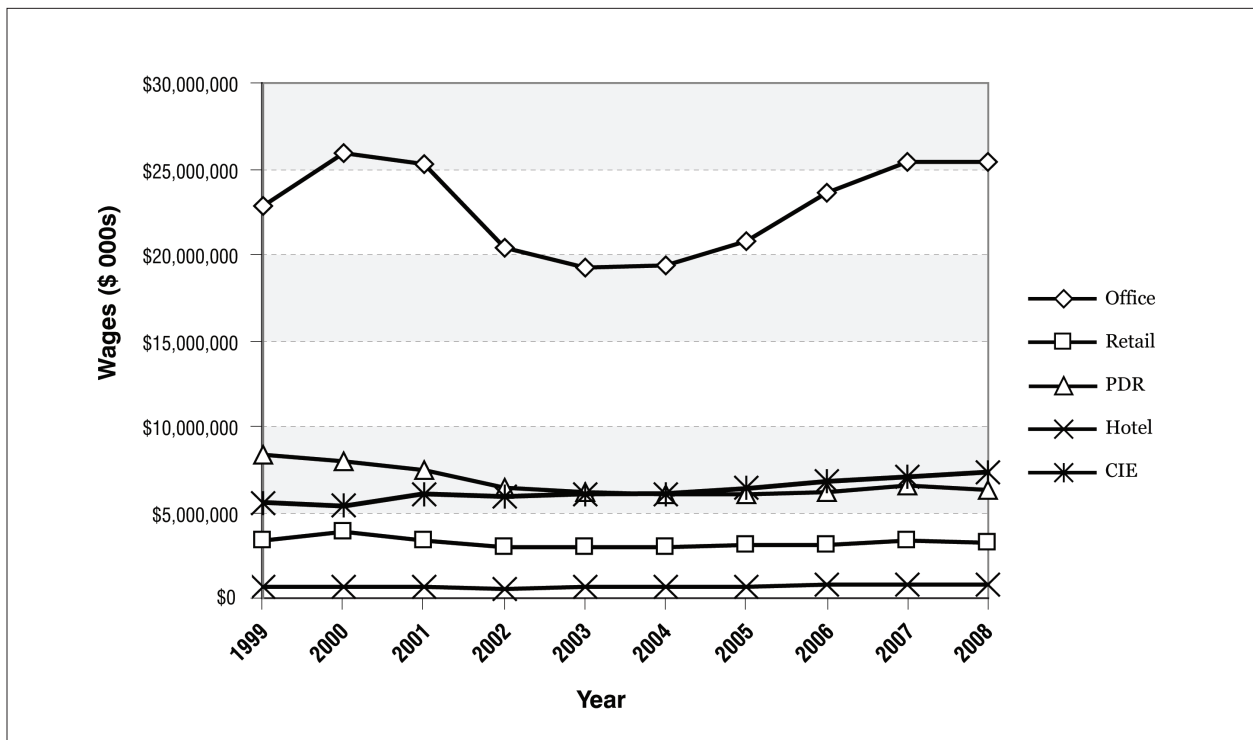
## Sources:

- 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, 2008



**FIGURE 5.1.2** TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1999-2008



**TABLE 5.1.2 ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 1999-2008**

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 (2008 \$)

| Land Use Category | 1999            | 2000            | 2001            | 2002            | 2003            | 2004            | 2005            | 2006            | 2007            | 2008            |
|-------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Office            | \$100,017       | \$106,766       | \$107,261       | \$95,958        | \$95,663        | \$100,330       | \$106,881       | \$114,973       | \$118,888       | \$115,455       |
| Retail            | \$34,678        | \$37,686        | \$33,062        | \$31,321        | \$31,033        | \$30,855        | \$32,159        | \$31,907        | \$32,424        | \$31,258        |
| PDR               | \$71,451        | \$68,998        | \$69,220        | \$65,637        | \$66,130        | \$68,571        | \$71,228        | \$75,060        | \$77,045        | \$74,597        |
| Hotel             | \$35,842        | \$37,044        | \$36,022        | \$34,531        | \$34,563        | \$35,566        | \$36,173        | \$37,470        | \$38,172        | \$39,157        |
| CIE               | \$43,456        | \$42,822        | \$49,977        | \$48,178        | \$48,433        | \$47,787        | \$49,910        | \$52,051        | \$52,013        | \$51,643        |
| <b>TOTAL</b>      | <b>\$69,270</b> | <b>\$72,362</b> | <b>\$73,349</b> | <b>\$66,600</b> | <b>\$65,821</b> | <b>\$67,224</b> | <b>\$70,906</b> | <b>\$75,562</b> | <b>\$77,605</b> | <b>\$75,890</b> |

Percentage Change

| Land Use Category | 1999-00    | 2000-01    | 2001-02     | 2001- 02    | 2003-04    | 2004-05    | 2005-06    | 2006-07    | 2007-08     |
|-------------------|------------|------------|-------------|-------------|------------|------------|------------|------------|-------------|
| Office            | 6.7        | N/A        | -10.5       | -0.3        | 4.9        | 6.5        | 7.6        | 3.4        | -2.9        |
| Retail            | 8.7        | N/A        | -5.3        | -0.9        | -0.6       | 4.2        | -0.8       | 1.6        | -3.6        |
| PDR               | -3.4       | N/A        | -5.2        | 0.8         | 3.7        | 3.9        | 5.4        | 2.6        | -3.2        |
| Hotel             | 3.4        | N/A        | -4.1        | 0.1         | 2.9        | 1.7        | 3.6        | 1.9        | 2.6         |
| CIE               | -1.5       | N/A        | -3.6        | 0.5         | -1.3       | 4.4        | 4.3        | -0.1       | -0.7        |
| <b>TOTAL</b>      | <b>4.5</b> | <b>N/A</b> | <b>-9.2</b> | <b>-1.2</b> | <b>2.1</b> | <b>5.5</b> | <b>6.6</b> | <b>2.7</b> | <b>-2.2</b> |

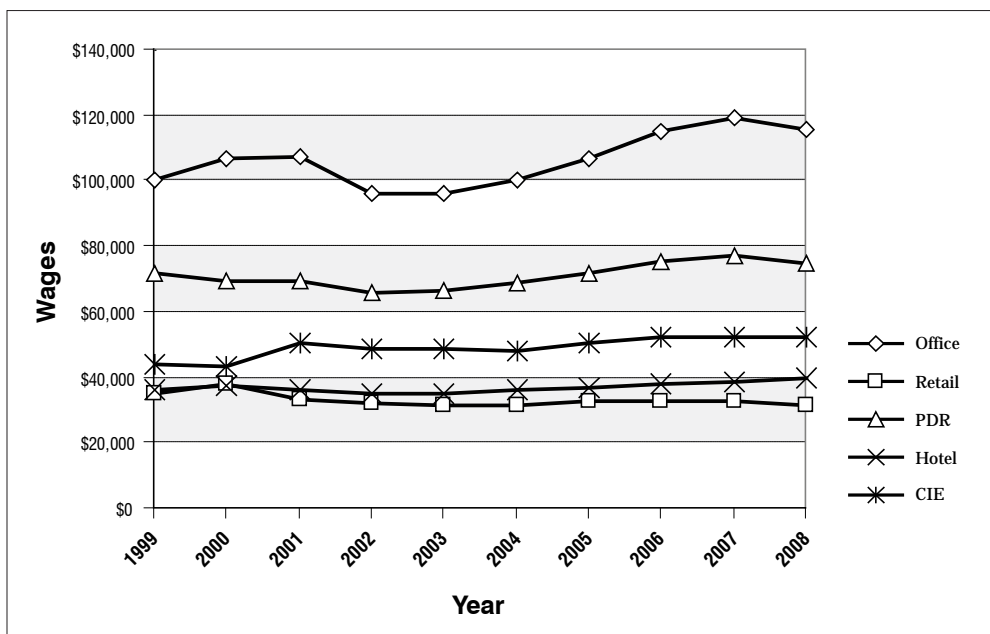
Note:

- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

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, 1999-2008**



**TABLE 5.2.1 TAXABLE RETAIL SALES AND ALL OUTLET SALES, 1999-2008**

This table conveys taxable sales in San Francisco from 1999-2008. 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         | 2008         |
|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 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  | \$10,006,572 | \$10,292,931 |
| 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 | \$14,617,736 | \$15,247,823 |

Inflation-Adjusted (2008 \$ 000s)

| Type of Sales    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| All Retail Sales | \$9,915,506  | \$10,817,496 | \$9,373,324  | \$8,820,601  | \$8,809,378  | \$9,429,253  | \$9,945,704  | \$10,210,353 | \$10,317,772 | \$10,292,931 |
| All Outlets      | \$15,934,310 | \$17,418,261 | \$14,610,930 | \$13,376,916 | \$13,040,202 | \$13,679,224 | \$14,315,526 | \$14,793,122 | \$15,069,248 | \$15,247,823 |

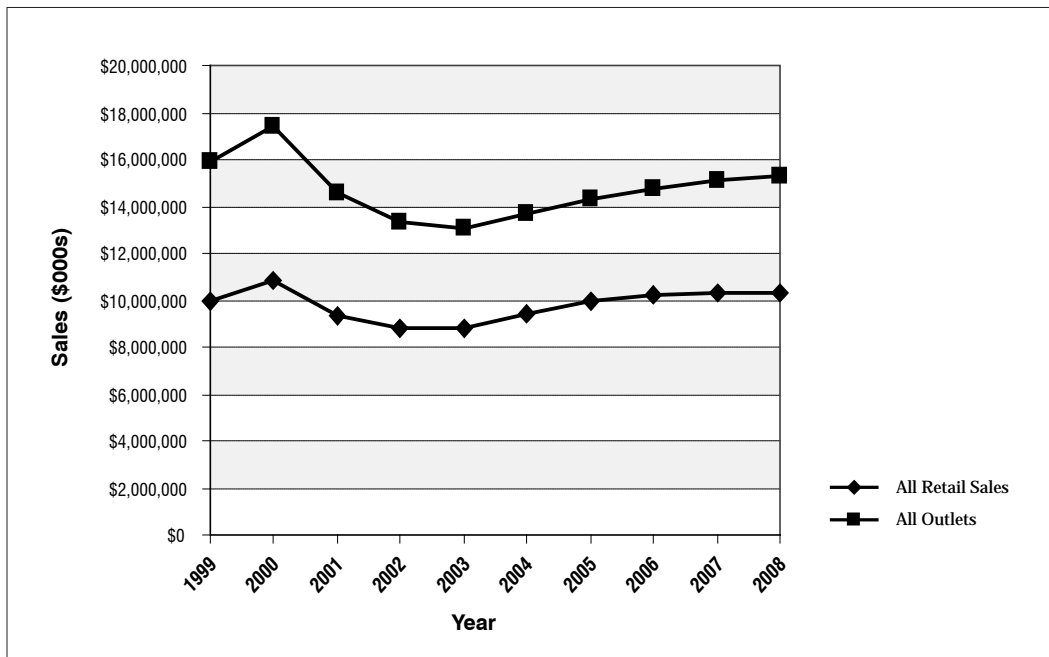
Note:

- 2008 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 1999-2007 data.

Sources:

- California State Board of Equalization, Taxable Sales in California; <http://www.boe.ca.gov/news/tsalescont07.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, 1999-2008**



**TABLE 5.2.2 TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2008**

This table looks more closely at the type of retail sales that occurred in 2008, 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                         | 1,678             | \$1,022,504                          |
| General Merchandise                    | 448               | \$1,288,121                          |
| Food Stores                            | 1,068             | \$517,681                            |
| Eating & Drinking                      | 4,046             | \$2,803,277                          |
| Home Furnishings & Appliances          | 1,074             | \$621,255                            |
| Building Materials and Farm Implements | 244               | \$467,573                            |
| Service Stations                       | 130               | \$702,417                            |
| Automotive Dealers and Supplies        | 250               | \$450,920                            |
| Other Retail Stores                    | 7,022             | \$2,419,185                          |
| <b>Total Retail Stores</b>             | <b>15,960</b>     | <b>\$10,292,931</b>                  |
| <b>Total Outlets</b>                   | <b>28,522</b>     | <b>\$15,247,823</b>                  |

**Notes:**

- 2008 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 1999-2007 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/tsalescont08.htm>
- Additional calculations by the San Francisco Planning Department

**TABLE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2008**

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2008. This data is shown graphically in Figure 5.3.2.

| Revenue Source                       | Amount (\$ 000s)   | Percentage Distribution |
|--------------------------------------|--------------------|-------------------------|
| Property Taxes                       | \$1,179,864        | 32.1                    |
| Business Taxes                       | \$396,025          | 10.8                    |
| Other Local Taxes                    | \$652,971          | 17.8                    |
| Licenses, Permits, Fines & Penalties | \$44,160           | 1.2                     |
| Interest & Investment Income         | \$54,256           | 1.5                     |
| Rents & Concessions                  | \$70,160           | 1.9                     |
| Intergovernmental                    | \$905,317          | 24.7                    |
| <i>Federal -</i>                     | \$328,315          | 8.9                     |
| <i>State -</i>                       | \$561,095          | 15.3                    |
| <i>Other -</i>                       | \$15,907           | 0.4                     |
| Charges for Services                 | \$288,689          | 7.9                     |
| Other                                | \$81,321           | 2.2                     |
| <b>TOTAL</b>                         | <b>\$3,672,587</b> | <b>100.0</b>            |

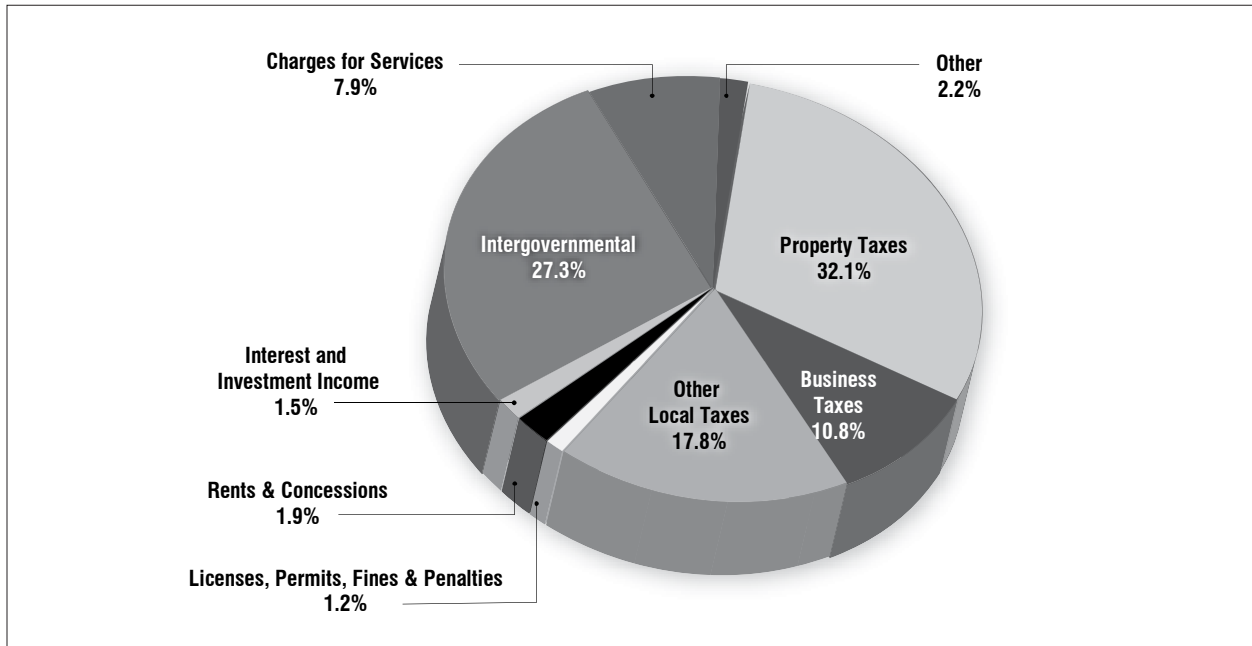
**Note:**

- Fiscal Year 2008 runs from July 1, 2007 to June 30 2008

**Source:**

- San Francisco Controller, Comprehensive Annual Financial Report.  
[http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/08/CAFR\\_2008.pdf](http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/08/CAFR_2008.pdf)

**FIGURE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2008**



**TABLE 5.3.2** SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2008

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2008. This data is shown graphically in Figure 5.3.1.

| Expenditure Function                     | Amount (\$ 000s)   | Percentage Distribution |
|--|--------------------|-------------------------|
| Public Protection                        | \$927,198          | 26.2                    |
| Public Works, Transportation & Commerce  | \$332,171          | 9.4                     |
| Human Welfare & Neighborhood Development | \$828,903          | 23.4                    |
| Community Health                         | \$543,046          | 15.3                    |
| Culture & Recreation                     | \$309,612          | 8.7                     |
| General Administration & Finance         | \$210,466          | 5.9                     |
| General City Responsibilities            | \$71,205           | 2.0                     |
| Debt Service                             | \$183,514          | 5.2                     |
| Capital Outlay                           | \$133,155          | 3.8                     |
| <b>TOTAL</b>                             | <b>\$3,539,270</b> | <b>100.0</b>            |

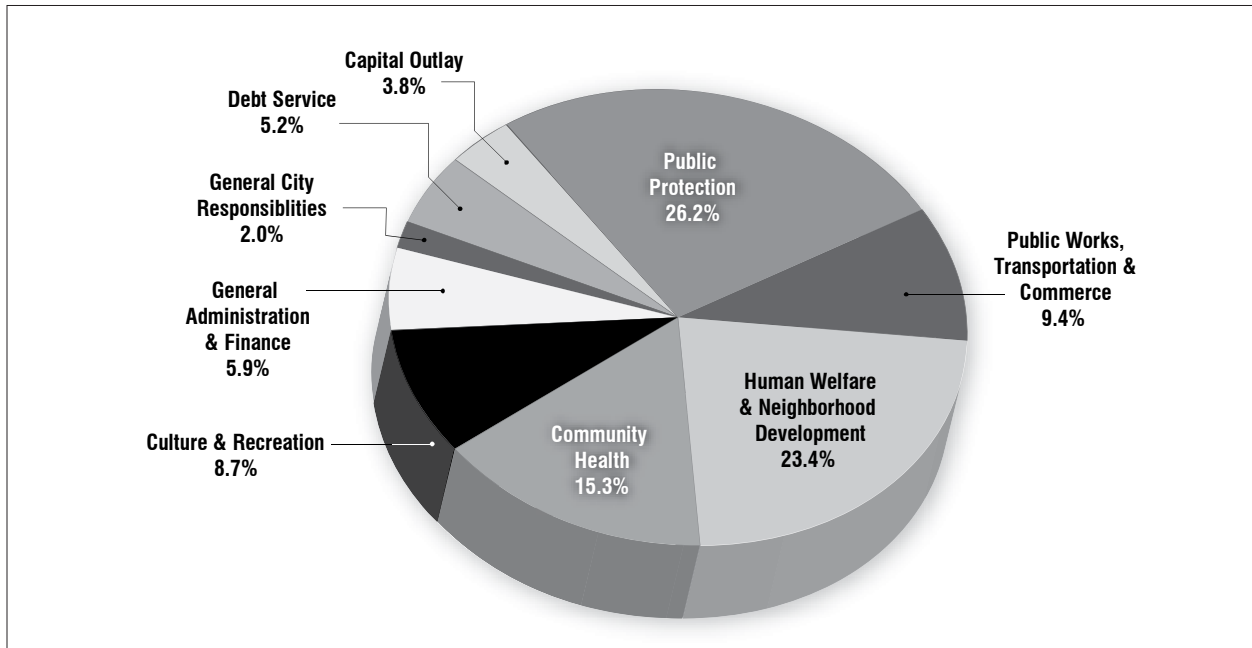
**Note:**

- Fiscal Year 2008 runs from July 1, 2007 to June 30, 2008

**Source:**

- San Francisco Controller, Comprehensive Annual Financial Report.  
[http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/08/CAFR\\_2008.pdf](http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/08/CAFR_2008.pdf)

**FIGURE 5.3.2** SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2008



# 6.0 BUILDING AND LAND USE

The tables and graphs in this chapter present information about building permit applications for 1999 through 2008, as well as land use data for 2008. 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 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, 1999-2008* — The number of building permits fell by 7.5% in 2008. The Residential land use category, which accounts for more than 70% of all building permits, decreased 8.6%
- *Table 6.1.1.B Total Construction Costs for All Building Permits by Land Use Category, 1999-2008* — Total construction costs decreased more than 35% in 2008. These drops occurred in all land use categories with the exception of CIE costs, which increased 10%.
- *Table 6.1.1.C Average Construction Costs for All Building Permits by Land Use Category, 1999-2008* — Average construction costs decreased in 2008 for the third year in a row.



- *Table 6.1.2.A Building Permits for New Construction by Land Use Category, 1999-2008* — The number of building permits for new construction decreased about 29% in 2008. The biggest category decline was for CIE permits (54%). Residential, which accounts for over 75% of all new construction permits, decreased by almost a third. However, the number of new construction projects in the PDR category rose by almost 86%.
- *Table 6.1.2.B Total Construction Costs for New Construction by Land Use Category, 1999-2008* — Total new construction costs decreased substantially in 2008 for the third year in a row, almost entirely driven by a decrease in residential permitting activity.
- *Table 6.1.2.C Average Construction Costs for New Construction by Land Use Category, 1999-2008* — Average new construction costs fell more than 20% in 2008. 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 Alterations and Demolitions by Land Use Category, 1999-2008* — The number of permits for alterations and demolitions decreased moderately (-7.3%) in 2008 after having remained largely constant for a number of years. This decrease can be attributed to drops in the two largest categories of alteration and demolition permits – Residential (-8.4%) and Office (-13.2%).
- *Table 6.1.3.B Total Construction Costs for Alterations and Demolitions by Land Use Category, 1999-2008* — Total construction costs for alterations and demolitions fell almost 28% in 2008. The largest actual and percentage decreases occurred in the Office land use category.
- *Table 6.1.3.C Average Construction Costs for Alterations and Demolitions by Land Use Category, 1999-2008* — Average construction costs for demolitions and alterations fell in every land use category in 2008.
- *Table 6.2.1.A All Building Permits by Commerce & Industry District, 1999-2008* — There was little change in the distribution of permits by district over the past four years. Every C&I district with the exception of the Northwest and Mission experienced decreases in building permits in 2008. 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, 1999-2008* — Overall construction costs declined by 33% from 2007 to 2008. The Financial and South of Market 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, 1999-2008* — 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 2008 by 27.6%.
- *Table 6.2.2.A Building Permits for New Construction by Commerce & Industry District, 1999-2008* — Overall, permits for new construction decreased more than 29% between 2007 and 2008. These permit drops were seen in every district except the Bayview and Civic Center where there was a slight increase in new construction permits in 2008. New construction in the Mission district was down some 74%.
- *Table 6.2.2.B Total Construction Costs for New Construction by Commerce & Industry District, 1999-2008* — There was substantial changes by district in the cost for new construction between 2007 and 2008, as every district posted at least double-digit changes. This is not atypical of new construction costs. Overall new construction costs declined by 20.5% from 2007 to 2008.

- *Table 6.2.2.C Average Construction Costs for New Construction by Commerce & Industry District, 1999-2008* — 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 20.5% between 2007 and 2008.
- *Table 6.2.3.A Building Permits for Alterations and Demolitions by Commerce & Industry District, 1999-2008* — Citywide, permits for alterations and demolitions fell by 7.3%. Geographic distribution of permits for alterations or demolitions is largely consistent with previous years. The largest decreases in actual permits occurred in the Southwest, Financial, and North Central districts.
- *Table 6.2.3.B Total Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1999-2008* — 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 Financial, Southwest, and South of Market districts reported the most total construction costs.
- *Table 6.2.3.C Average Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1999-2008* — Like total costs, average costs also fluctuated from 2007 to 2008 for most districts. Overall, the average construction costs for alterations and demolitions were down almost 22%.

**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 2008.

- *Table 6.3.A Permit Applications by Commerce & Industry District and Land Use Category, 2008*— The Residential land use category is by far the largest generator of building permits, accounting for 70.3% of all permits in 2008. The Southwest district generated 43.1% of the Residential permits. Almost 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 (20.2%). Most PDR permit applications tended to be for projects in the South of Market (42.1%) and Bayview (22.6%) districts. About 30% 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, 2008* — Construction costs for office permits were greatest in the Financial (48.2%) and South of Market (40.2%) districts. The Southwest, North Central, and Financial districts accounted for the highest percentage of residential construction costs, accounting for 28.5%, 20.3%, and 14.2% respectively. The majority of retail construction spending occurred in the South of Market (49.1%) and Financial (19.9%) districts. CIE permit costs were highest in the Southwest (28.9%) districts, while Hotel permit spending was highest in the Financial district (49.2%). Construction spending for PDR was overwhelming concentrated in the South of Market district (63.7%)
- *Table 6.3.C Average Construction Costs of All Permits by Commerce & Industry District and Land Use Category, 2008* — Average construction costs were highest for CIE, Office, and Hotel permits at \$191,100, \$134,900 and \$125,100 respectively. Among the districts, average construction costs were highest for the Financial district (\$170,000).

**Section 6.4** describes permit applications by application status by Land Use Category and then by C&I District for 2008. 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, 2008* — 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 (55.9%) or Issued (37.4%) permit status category.
- *Table 6.4.1.B Total Construction Costs of All Building Permits by Land Use Category and Permit Status, 2008* — Almost all of all construction costs were in the Issued (36.6%), Other (31.8%), or Completed (29.6%) permit status. Almost 46% of Completed construction costs were in the Office land use category. Close to half (45.9%) of Issued construction costs and 56% of Other construction costs were in the Residential land use category in 2008 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, 2008* — 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 Office projects in the Other category where the average cost was over \$1,051,000.
- *Table 6.4.2.A All Building Permits by Commerce & Industry District and Permit Status, 2008* — 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 (14.8%) while the North Central district had the next highest percentage of Issued permits (14.5%).
- *Table 6.4.2.B Total Construction Costs of All Building Permits by Commerce & Industry District and Permit Status, 2008* — The Financial district had the highest share of total construction costs for completed projects (39.3%) followed by Southwest (17.1%) and South of Market (13.2%).

Issued permit construction costs were highest in the North Central (21.7%), Financial (20.7%), and South of Market districts (20.6%). Construction costs for projects in the Other category were concentrated in the South of Market (35.3%) and Financial (22.6%) districts.

- *Table 6.4.2.C Average Construction Costs of All Permits by Commerce & Industry District and Permit Status, 2008* — 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 South of Market and Financial 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 1999 to 2008. 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, 1999-2008* — Total office space increased 3.4% between 2007 and 2008, the largest gain since 2001-2002. 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 PDR. Construction is generally considered part of the PDR 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, PDR, 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 the Department of 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. Map 6.6 shows the location of the plan areas. Table 6.6 is based on the information available in year 2008.

Note the following section is to be revised pending Aksel's latest land use calculations.

- *Table 6.6 Land Use Square Footage by Plan Area, 2008* — 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 PDR (38.1%) land in the city. Other plan areas with significant PDR land were the Central Waterfront (19.7%) and the Port (11.1%).

**TABLE 6.1.1.A ALL BUILDING PERMITS BY LAND USE CATEGORY, 1999-2008**

This table presents the number of building permits filed by land use category (see Section 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 | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          | Average       |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Office            | 4,130         | 5,344         | 4,195         | 3,181         | 3,581         | 3,813         | 4,202         | 4,133         | 4,366         | 3,791         | 4,074         |
| Retail            | 2,136         | 1,790         | 1,787         | 1,745         | 1,753         | 1,887         | 1,661         | 2,139         | 1,852         | 1,927         | 1,868         |
| PDR               | 284           | 345           | 315           | 239           | 211           | 176           | 185           | 170           | 198           | 235           | 236           |
| Hotel             | 172           | 248           | 191           | 184           | 196           | 183           | 144           | 193           | 253           | 310           | 207           |
| CIE               | 553           | 419           | 452           | 512           | 432           | 364           | 356           | 429           | 459           | 602           | 458           |
| Residential       | 18,416        | 18,072        | 17,388        | 19,426        | 19,712        | 19,930        | 19,508        | 19,653        | 19,939        | 18,226        | 19,027        |
| Other             | 883           | 1,213         | 933           | 625           | 766           | 724           | 779           | 689           | 931           | 819           | 836           |
| <b>TOTAL</b>      | <b>26,574</b> | <b>27,431</b> | <b>25,261</b> | <b>25,912</b> | <b>26,651</b> | <b>27,077</b> | <b>26,835</b> | <b>27,406</b> | <b>27,998</b> | <b>25,910</b> | <b>26,706</b> |

## Annual Percentage Distribution

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         | Average      |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 15.5         | 19.5         | 16.6         | 12.3         | 13.4         | 14.1         | 15.7         | 15.1         | 15.6         | 14.6         | <b>15.2</b>  |
| Retail            | 8.0          | 6.5          | 7.1          | 6.7          | 6.6          | 7.0          | 6.2          | 7.8          | 6.6          | 7.4          | <b>7.0</b>   |
| PDR               | 1.1          | 1.3          | 1.2          | 0.9          | 0.8          | 0.6          | 0.7          | 0.6          | 0.7          | 0.9          | <b>0.9</b>   |
| Hotel             | 0.6          | 0.9          | 0.8          | 0.7          | 0.7          | 0.7          | 0.5          | 0.7          | 0.9          | 1.2          | <b>0.8</b>   |
| CIE               | 2.1          | 1.5          | 1.8          | 2.0          | 1.6          | 1.3          | 1.3          | 1.6          | 1.6          | 2.3          | <b>1.7</b>   |
| Residential       | 69.3         | 65.9         | 68.8         | 75.0         | 74.0         | 73.6         | 72.7         | 71.7         | 71.2         | 70.3         | <b>71.3</b>  |
| Other             | 3.3          | 4.4          | 3.7          | 2.4          | 2.9          | 2.7          | 2.9          | 2.5          | 3.3          | 3.2          | <b>3.1</b>   |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Land Use Category | 1999-00    | 2000-01     | 2001-02    | 2002-03    | 2003-04    | 2004-05     | 2005-06    | 2006-07    | 2007-08     |
|-------------------|------------|-------------|------------|------------|------------|-------------|------------|------------|-------------|
| Office            | 29.4       | -21.5       | -24.2      | 12.6       | 6.5        | 10.2        | -1.6       | 5.6        | -13.2       |
| Retail            | -16.2      | -0.2        | -2.4       | 0.5        | 7.6        | -12.0       | 28.8       | -13.4      | 4.0         |
| PDR               | 21.5       | -8.7        | -24.1      | -11.7      | -16.6      | 5.1         | -8.1       | 16.5       | 18.7        |
| Hotel             | 44.2       | -23.0       | -3.7       | 6.5        | -6.6       | -21.3       | 34.0       | 31.1       | 22.5        |
| CIE               | -24.2      | 7.9         | 13.3       | -15.6      | -15.7      | -2.2        | 20.5       | 7.0        | 31.2        |
| Residential       | -1.9       | -3.8        | 11.7       | 1.5        | 1.1        | -2.1        | 0.7        | 1.5        | -8.6        |
| Other             | 37.4       | -23.1       | -33.0      | 22.6       | -5.5       | 7.6         | -11.6      | 35.1       | -12.0       |
| <b>TOTAL</b>      | <b>3.2</b> | <b>-7.9</b> | <b>2.6</b> | <b>2.9</b> | <b>1.6</b> | <b>-0.9</b> | <b>2.1</b> | <b>2.2</b> | <b>-7.5</b> |

## Notes:

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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 | 1999               | 2000               | 2001               | 2002               | 2003             | 2004               | 2005               | 2006               | 2007               | 2008             |
|-------------------|--------------------|--------------------|--------------------|--------------------|------------------|--------------------|--------------------|--------------------|--------------------|------------------|
| Office            | \$330,270          | \$827,426          | \$233,256          | \$179,323          | \$156,504        | \$186,497          | \$210,249          | \$317,964          | \$378,393          | \$232,285        |
| Retail            | \$323,704          | \$236,699          | \$76,120           | \$66,935           | \$85,382         | \$56,203           | \$49,522           | \$75,189           | \$94,333           | \$72,920         |
| PDR               | \$25,733           | \$74,319           | \$29,060           | \$18,942           | \$9,708          | \$12,622           | \$7,951            | \$8,804            | \$20,449           | \$11,925         |
| Hotel             | \$25,769           | \$124,006          | \$21,231           | \$86,498           | \$4,399          | \$2,770            | \$16,249           | \$33,284           | \$29,850           | \$17,606         |
| CIE               | \$47,694           | \$130,103          | \$135,717          | \$63,152           | \$67,649         | \$120,892          | \$32,409           | \$61,103           | \$47,499           | \$52,246         |
| Residential       | \$515,561          | \$515,867          | \$510,984          | \$628,357          | \$488,554        | \$620,579          | \$901,855          | \$611,374          | \$500,738          | \$335,043        |
| Other             | \$6,578            | \$14,637           | \$12,429           | \$3,129            | \$3,398          | \$8,174            | \$4,382            | \$17,878           | \$14,564           | \$5,247          |
| <b>TOTAL</b>      | <b>\$1,275,310</b> | <b>\$1,923,057</b> | <b>\$1,018,798</b> | <b>\$1,046,337</b> | <b>\$815,595</b> | <b>\$1,007,737</b> | <b>\$1,222,617</b> | <b>\$1,125,597</b> | <b>\$1,085,824</b> | <b>\$727,272</b> |

## Annual Percentage Distribution

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 25.9         | 43.0         | 22.9         | 17.1         | 19.2         | 18.5         | 17.2         | 28.2         | 34.8         | 31.9         |
| Retail            | 25.4         | 12.3         | 7.5          | 6.4          | 10.5         | 5.6          | 4.1          | 6.7          | 8.7          | 10.0         |
| PDR               | 2.0          | 3.9          | 2.9          | 1.8          | 1.2          | 1.3          | 0.7          | 0.8          | 1.9          | 1.6          |
| Hotel             | 3.7          | 6.8          | 13.3         | 6.0          | 8.3          | 12.0         | 2.7          | 3.0          | 2.7          | 2.4          |
| CIE               | 2.0          | 6.4          | 2.1          | 8.3          | 0.5          | 0.3          | 1.3          | 5.4          | 4.4          | 7.2          |
| Residential       | 40.4         | 26.8         | 50.2         | 60.1         | 59.9         | 61.6         | 73.8         | 54.3         | 46.1         | 46.1         |
| Other             | 0.5          | 0.8          | 1.2          | 0.3          | 0.4          | 0.8          | 0.4          | 1.6          | 1.3          | 0.7          |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Land Use Category | 1999-00     | 2000-01      | 2001-02    | 2002-03      | 2003-04     | 2004-05     | 2005-06     | 2006-07     | 2007-08      |
|-------------------|-------------|--------------|------------|--------------|-------------|-------------|-------------|-------------|--------------|
| Office            | 150.5       | -71.8        | -23.1      | -12.7        | 19.2        | 12.7        | 51.2        | 19.0        | -38.6        |
| Retail            | -26.9       | -67.8        | -12.1      | 27.6         | -34.2       | -11.9       | 51.8        | 25.5        | -22.7        |
| PDR               | 188.8       | -60.9        | -34.8      | -48.7        | 30.0        | -37.0       | 10.7        | 132.3       | -41.7        |
| Hotel             | 172.8       | 4.3          | -53.5      | 7.1          | 78.7        | -73.2       | 2.7         | -10.3       | -41.0        |
| CIE               | 381.2       | -82.9        | 307.4      | -94.9        | -37.0       | 486.5       | 276.0       | -22.3       | 10.0         |
| Residential       | 0.1         | -0.9         | 23.0       | -22.2        | 27.0        | 45.3        | -32.2       | -18.1       | -33.1        |
| Other             | 122.5       | -15.1        | -74.8      | 8.6          | 140.6       | -46.4       | 308.0       | -18.5       | -64.0        |
| <b>TOTAL</b>      | <b>50.8</b> | <b>-47.0</b> | <b>2.7</b> | <b>-22.1</b> | <b>23.6</b> | <b>21.3</b> | <b>-7.9</b> | <b>-3.5</b> | <b>-35.4</b> |

## Notes:

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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 | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          | Average        |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Office            | \$80.0        | \$154.8       | \$55.6        | \$56.4        | \$43.7        | \$48.9        | \$50.0        | \$76.9        | \$86.7        | \$61.3        | <b>\$71.4</b>  |
| Retail            | \$151.5       | \$132.2       | \$42.6        | \$38.4        | \$48.7        | \$29.8        | \$29.8        | \$35.2        | \$50.9        | \$37.8        | <b>\$59.7</b>  |
| PDR               | \$90.6        | \$215.4       | \$92.3        | \$79.3        | \$46.0        | \$71.7        | \$43.0        | \$51.8        | \$103.3       | \$50.7        | <b>\$84.4</b>  |
| Hotel             | \$149.8       | \$500.0       | \$111.2       | \$470.1       | \$22.4        | \$15.1        | \$112.8       | \$172.5       | \$118.0       | \$56.8        | <b>\$172.9</b> |
| CIE               | \$86.2        | \$310.5       | \$300.3       | \$123.3       | \$156.6       | \$332.1       | \$91.0        | \$142.4       | \$103.5       | \$86.8        | <b>\$173.3</b> |
| Residential       | \$28.0        | \$28.5        | \$29.4        | \$32.3        | \$24.8        | \$31.1        | \$46.2        | \$31.1        | \$25.1        | \$18.4        | <b>\$29.5</b>  |
| Other             | \$7.5         | \$12.1        | \$13.3        | \$5.0         | \$4.4         | \$11.3        | \$5.6         | \$25.9        | \$15.6        | \$6.4         | <b>\$10.7</b>  |
| <b>Average</b>    | <b>\$48.0</b> | <b>\$70.1</b> | <b>\$40.3</b> | <b>\$40.4</b> | <b>\$30.6</b> | <b>\$37.2</b> | <b>\$45.6</b> | <b>\$41.1</b> | <b>\$38.8</b> | <b>\$28.1</b> | <b>\$44.9</b>  |

## Percentage Change

| Land Use Category | 1999-00     | 2000-01      | 2001-02    | 2001-02      | 2003-04     | 2004-05     | 2005-06     | 2006-07     | 2007-08      |
|-------------------|-------------|--------------|------------|--------------|-------------|-------------|-------------|-------------|--------------|
| Office            | 93.6        | -64.1        | 1.4        | -22.5        | 11.9        | 2.3         | 53.8        | 12.7        | -29.3        |
| Retail            | -12.7       | -67.8        | -10.0      | 27.0         | -38.8       | 0.1         | 17.9        | 44.9        | -25.7        |
| PDR               | 137.7       | -57.2        | -14.1      | -41.9        | 55.9        | -40.1       | 20.5        | 99.4        | -50.9        |
| Hotel             | 233.8       | -77.8        | 322.9      | -95.2        | -32.6       | 645.4       | 52.8        | -31.6       | -51.9        |
| CIE               | 260.0       | -3.3         | -58.9      | 27.0         | 112.1       | -72.6       | 56.5        | -27.3       | -16.1        |
| Residential       | 2.0         | 3.0          | 10.1       | -23.4        | 25.6        | 48.5        | -32.7       | -19.3       | -26.8        |
| Other             | 62.0        | 10.4         | -62.4      | -11.4        | 154.5       | -50.2       | 361.3       | -39.7       | -59.0        |
| <b>TOTAL</b>      | <b>46.1</b> | <b>-42.5</b> | <b>0.1</b> | <b>-24.2</b> | <b>21.6</b> | <b>22.4</b> | <b>-9.9</b> | <b>-5.6</b> | <b>-30.2</b> |

**Notes:**

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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 | 1999       | 2000       | 2001       | 2002       | 2003       | 2004       | 2005       | 2006       | 2007       | 2008       | Average    |
|-------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Office            | 9          | 36         | 5          | 8          | 4          | 2          | 6          | 5          | 11         | 9          | 10         |
| Retail            | 28         | 25         | 28         | 23         | 16         | 16         | 10         | 10         | 8          | 5          | 17         |
| PDR               | 15         | 13         | 10         | 8          | 5          | 7          | 4          | 13         | 7          | 13         | 10         |
| Hotel             | 1          | 2          | 1          | 2          | 0          | 0          | 0          | 1          | 0          | 0          | 1          |
| CIE               | 9          | 8          | 17         | 6          | 11         | 9          | 5          | 18         | 11         | 5          | 10         |
| Residential       | 422        | 343        | 250        | 216        | 252        | 189        | 260        | 179        | 150        | 101        | 236        |
| Other             | 1          | 4          | 2          | 2          | 0          | 2          | 0          | 4          | 1          | 0          | 2          |
| <b>TOTAL</b>      | <b>485</b> | <b>431</b> | <b>313</b> | <b>265</b> | <b>288</b> | <b>225</b> | <b>285</b> | <b>230</b> | <b>188</b> | <b>133</b> | <b>284</b> |

## Annual Percentage Distribution

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         | Average      |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 1.9          | 8.4          | 1.6          | 3.0          | 1.4          | 0.9          | 2.1          | 2.2          | 5.9          | 6.8          | 3.4          |
| Retail            | 5.8          | 5.8          | 8.9          | 8.7          | 5.6          | 7.1          | 3.5          | 4.3          | 4.3          | 3.8          | 5.8          |
| PDR               | 3.1          | 3.0          | 3.2          | 3.0          | 1.7          | 3.1          | 1.4          | 5.7          | 3.7          | 9.8          | 3.8          |
| Hotel             | 0.2          | 0.5          | 0.3          | 0.8          | 0.0          | 0.0          | 0.0          | 0.4          | 0.0          | 0.0          | 0.2          |
| CIE               | 1.9          | 1.9          | 5.4          | 2.3          | 3.8          | 4.0          | 1.8          | 7.8          | 5.9          | 3.8          | 3.8          |
| Residential       | 87.0         | 79.6         | 79.9         | 81.5         | 87.5         | 84.0         | 91.2         | 77.8         | 79.8         | 75.9         | 82.4         |
| Other             | 0.2          | 0.9          | 0.6          | 0.8          | 0.0          | 0.9          | 0.0          | 1.7          | 0.5          | 0.0          | 0.6          |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Land Use Category | 1999-00      | 2000-01      | 2001-02      | 2002-03    | 2003-04      | 2004-05     | 2005-06      | 2006-07      | 2007-08      |
|-------------------|--------------|--------------|--------------|------------|--------------|-------------|--------------|--------------|--------------|
| Office            | 300.0        | -86.1        | 60.0         | -50.0      | -50.0        | 200.0       | -16.7        | 120.0        | -18.2        |
| Retail            | -10.7        | 12.0         | -17.9        | -30.4      | 0.0          | -37.5       | 0.0          | -20.0        | -37.5        |
| PDR               | -13.3        | -23.1        | -20.0        | -37.5      | 40.0         | -42.9       | 225.0        | -46.2        | 85.7         |
| Hotel             | 100.0        | -50.0        | 100.0        | -100.0     | -            | -           | -            | -100.0       | -            |
| CIE               | -11.1        | 112.5        | -64.7        | 83.3       | -18.2        | -44.4       | 260.0        | -38.9        | -54.5        |
| Residential       | -18.7        | -27.1        | -13.6        | 16.7       | -25.0        | 37.6        | -31.2        | -16.2        | -32.7        |
| Other             | 300.0        | -50.0        | 0.0          | -100.0     | -            | -100.0      | -            | -75.0        | -100.0       |
| <b>TOTAL</b>      | <b>-11.1</b> | <b>-27.4</b> | <b>-15.3</b> | <b>8.7</b> | <b>-21.9</b> | <b>26.7</b> | <b>-19.3</b> | <b>-18.3</b> | <b>-29.3</b> |

## Notes:

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

This table presents the total cost of new construction associated with building permits filed by land use category over the last ten years. 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 | 1999             | 2000               | 2001             | 2002             | 2003             | 2004             | 2005             | 2006             | 2007             | 2008             | Average          |
|-------------------|------------------|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Office            | \$69,095         | \$485,719          | \$13,458         | \$27,341         | \$1,218          | \$17,636         | \$13,625         | \$110,039        | \$92,421         | \$65,762         | <b>\$89,631</b>  |
| Retail            | \$34,691         | \$161,636          | \$24,204         | \$20,471         | \$34,792         | \$9,488          | \$4,274          | \$527            | \$22,101         | \$25,437         | <b>\$33,762</b>  |
| PDR               | \$8,623          | \$25,607           | \$13,110         | \$9,725          | \$1,685          | \$2,500          | \$460            | \$1,932          | \$14,569         | \$5,403          | <b>\$8,361</b>   |
| Hotel             | \$12,164         | \$30,029           | \$2,879          | \$76,341         | \$0              | \$0              | \$0              | \$5,727          | \$0              | \$0              | <b>\$12,714</b>  |
| CIE               | \$10,148         | \$89,541           | \$105,377        | \$30,200         | \$20,783         | \$15,867         | \$7,791          | \$16,563         | \$9,001          | \$9,867          | <b>\$31,514</b>  |
| Residential       | \$296,264        | \$268,354          | \$284,073        | \$338,534        | \$199,517        | \$369,527        | \$633,955        | \$375,230        | \$203,202        | \$85,590         | <b>\$305,424</b> |
| Other             | \$0              | \$4,382            | \$0              | \$0              | \$0              | \$108            | \$0              | \$0              | \$129            | \$129            | <b>\$462</b>     |
| <b>TOTAL</b>      | <b>\$430,985</b> | <b>\$1,065,268</b> | <b>\$443,100</b> | <b>\$502,611</b> | <b>\$257,995</b> | <b>\$415,126</b> | <b>\$660,105</b> | <b>\$510,018</b> | <b>\$341,423</b> | <b>\$192,059</b> | <b>\$481,869</b> |

## Annual Percentage Distribution

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         | Average      |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 16.0         | 45.6         | 3.0          | 5.4          | 0.5          | 4.2          | 2.1          | 21.6         | 27.1         | 34.2         | <b>16.0</b>  |
| Retail            | 8.0          | 15.2         | 5.5          | 4.1          | 13.5         | 2.3          | 0.6          | 0.1          | 6.5          | 13.2         | <b>6.9</b>   |
| PDR               | 2.0          | 2.4          | 3.0          | 1.9          | 0.7          | 0.6          | 0.1          | 0.4          | 4.3          | 2.8          | <b>1.8</b>   |
| Hotel             | 2.8          | 2.8          | 0.6          | 15.2         | 0.0          | 0.0          | 0.0          | 1.1          | 0.0          | 0.0          | <b>2.3</b>   |
| CIE               | 2.4          | 8.4          | 23.8         | 6.0          | 8.1          | 3.8          | 1.2          | 3.2          | 2.6          | 5.1          | <b>6.5</b>   |
| Residential       | 68.7         | 25.2         | 64.1         | 67.4         | 77.3         | 89.0         | 96.0         | 73.6         | 59.5         | 44.6         | <b>66.5</b>  |
| Other             | 0.0          | 0.4          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | <b>0.0</b>   |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Land Use Category | 1999-00      | 2000-01      | 2001-02     | 2002-03      | 2003-04     | 2004-05     | 2005-06      | 2006-07      | 2007-08      |
|-------------------|--------------|--------------|-------------|--------------|-------------|-------------|--------------|--------------|--------------|
| Office            | 603.0        | -97.2        | 103.2       | -95.5        | 1348.0      | -22.7       | 707.6        | -16.0        | -28.8        |
| Retail            | 365.9        | -85.0        | -15.4       | 70.0         | -72.7       | -55.0       | -87.7        | 4,090.9      | 15.1         |
| PDR               | 197.0        | -48.8        | -25.8       | -82.7        | 48.4        | -81.6       | 319.8        | 654.2        | -62.9        |
| Hotel             | 146.9        | -90.4        | 2551.9      | -100.0       | -           | -           | -            | -100.0       | -            |
| CIE               | 782.4        | 17.7         | -71.3       | -31.2        | -23.7       | -50.9       | 112.6        | -45.7        | 9.6          |
| Residential       | -9.4         | 5.9          | 19.2        | -41.1        | 85.2        | 71.6        | -40.8        | -45.8        | -57.9        |
| Other             | -            | -100.0       | -           | -            | -           | -           | -            | -            | -100.0       |
| <b>TOTAL</b>      | <b>147.2</b> | <b>-58.4</b> | <b>13.4</b> | <b>-48.7</b> | <b>60.9</b> | <b>59.0</b> | <b>-22.7</b> | <b>-33.1</b> | <b>-43.7</b> |

## Notes:

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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 | 1999           | 2000             | 2001             | 2002             | 2003           | 2004             | 2005             | 2006             | 2007             | 2008             | Average           |
|-------------------|----------------|------------------|------------------|------------------|----------------|------------------|------------------|------------------|------------------|------------------|-------------------|
| Office            | \$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        | \$7,306.9        | <b>\$7,638.8</b>  |
| Retail            | \$1,239.0      | \$6,465.4        | \$864.4          | \$890.0          | \$2,174.5      | \$593.0          | \$427.4          | \$52.7           | \$2,762.7        | \$5,087.4        | <b>\$2,055.7</b>  |
| PDR               | \$574.9        | \$1,969.8        | \$1,311.0        | \$1,215.6        | \$337.0        | \$357.1          | \$115.0          | \$148.6          | \$2,081.3        | \$415.6          | <b>\$852.6</b>    |
| Hotel             | \$12,164.1     | \$15,014.7       | \$2,878.8        | \$38,170.3       | -              | -                | -                | \$5,726.8        | -                | -                | <b>\$14,791.0</b> |
| CIE               | \$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          | \$1,973.4        | <b>\$3,247.4</b>  |
| Residential       | \$702.0        | \$782.4          | \$1,136.3        | \$1,567.3        | \$791.7        | \$1,955.2        | \$2,438.3        | \$2,096.3        | \$1,354.7        | \$847.4          | <b>\$1,367.2</b>  |
| Other             | \$0.0          | \$1,095.5        | \$0.0            | \$0.0            | -              | \$54.0           | -                | \$0.0            | \$129.0          | -                | <b>\$182.6</b>    |
| <b>TOTAL</b>      | <b>\$888.6</b> | <b>\$2,471.6</b> | <b>\$1,415.7</b> | <b>\$1,896.6</b> | <b>\$895.8</b> | <b>\$1,845.0</b> | <b>\$2,316.2</b> | <b>\$2,217.5</b> | <b>\$1,816.1</b> | <b>\$1,444.1</b> | <b>\$1,720.7</b>  |

Percentage Change

| Land Use Category | 1999-00      | 2000-01      | 2001-02     | 2001- 02     | 2003-04      | 2004-05     | 2005-06     | 2006-07      | 2007-08      |
|-------------------|--------------|--------------|-------------|--------------|--------------|-------------|-------------|--------------|--------------|
| Office            | 75.7         | -80.1        | 27.0        | -91.1        | 2,796.1      | -74.2       | 869.2       | -61.8        | -13.0        |
| Retail            | 421.8        | -86.6        | 3.0         | 144.3        | -72.7        | -27.9       | -87.7       | 5,138.6      | 84.1         |
| PDR               | 242.7        | -33.4        | -7.3        | -72.3        | 6.0          | -67.8       | 29.2        | 1,300.6      | -80.0        |
| Hotel             | 23.4         | -80.8        | 1,225.9     | -            | -            | -           | -           | -            | -            |
| CIE               | 892.7        | -44.6        | -18.8       | -62.5        | -6.7         | -11.6       | -40.9       | -11.1        | 141.2        |
| Residential       | 11.4         | 45.2         | 37.9        | -49.5        | 146.9        | 24.7        | -14.0       | -35.4        | -37.4        |
| Other             | -            | -100.0       | -           | -            | -            | -           | -           | -            | -            |
| <b>TOTAL</b>      | <b>178.1</b> | <b>-42.7</b> | <b>34.0</b> | <b>-52.8</b> | <b>106.0</b> | <b>25.5</b> | <b>-4.3</b> | <b>-18.1</b> | <b>-20.5</b> |

Notes:

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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 | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          | Average       |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Office            | 4,121         | 5,308         | 4,189         | 3,173         | 3,577         | 3,811         | 4,196         | 4,128         | 4,355         | 3,782         | <b>4,064</b>  |
| Retail            | 2,108         | 1,765         | 1,760         | 1,722         | 1,737         | 1,871         | 1,651         | 2,129         | 1,844         | 1,922         | <b>1,851</b>  |
| PDR               | 269           | 332           | 305           | 231           | 206           | 169           | 181           | 157           | 191           | 222           | <b>226</b>    |
| Hotel             | 171           | 246           | 190           | 182           | 196           | 183           | 144           | 192           | 253           | 310           | <b>207</b>    |
| CIE               | 544           | 411           | 435           | 506           | 421           | 355           | 351           | 411           | 448           | 597           | <b>448</b>    |
| Residential       | 17,993        | 17,730        | 17,138        | 19,210        | 19,460        | 19,741        | 19,249        | 19,474        | 19,789        | 18,125        | <b>1,891</b>  |
| Other             | 269           | 645           | 444           | 284           | 267           | 273           | 379           | 264           | 335           | 270           | <b>343</b>    |
| <b>TOTAL</b>      | <b>25,475</b> | <b>26,437</b> | <b>24,461</b> | <b>25,308</b> | <b>25,864</b> | <b>26,403</b> | <b>26,151</b> | <b>26,755</b> | <b>27,215</b> | <b>25,228</b> | <b>25,930</b> |

## Annual Percentage Distribution

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 16.2         | 20.1         | 17.1         | 12.5         | 13.8         | 14.4         | 16.0         | 15.4         | 16.0         | 15.0         |
| Retail            | 8.3          | 6.7          | 7.2          | 6.8          | 6.7          | 7.1          | 6.3          | 8.0          | 6.8          | 7.6          |
| PDR               | 1.1          | 1.3          | 1.2          | 0.9          | 0.8          | 0.6          | 0.7          | 0.6          | 0.7          | 0.9          |
| Hotel             | 0.7          | 0.9          | 0.8          | 0.7          | 0.8          | 0.7          | 0.6          | 0.7          | 0.9          | 1.2          |
| CIE               | 2.1          | 1.6          | 1.8          | 2.0          | 1.6          | 1.3          | 1.3          | 1.5          | 1.6          | 2.4          |
| Residential       | 70.6         | 67.1         | 70.1         | 75.9         | 75.2         | 74.8         | 73.6         | 72.8         | 72.7         | 71.8         |
| Other             | 1.1          | 2.4          | 1.8          | 1.1          | 1.0          | 1.0          | 1.4          | 1.0          | 1.2          | 1.1          |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Land Use Category | 1999-00    | 2000-01     | 2001-02    | 2002-03    | 2003-04    | 2004-05     | 2005-06    | 2006-07    | 2007-08     |
|-------------------|------------|-------------|------------|------------|------------|-------------|------------|------------|-------------|
| Office            | 28.8       | -21.1       | -24.3      | 12.7       | 6.5        | 10.1        | -1.6       | 5.5        | -13.2       |
| Retail            | -16.3      | -0.3        | -2.2       | 0.9        | 7.7        | -11.8       | 29.0       | -13.4      | 4.2         |
| PDR               | 23.4       | -8.1        | -24.3      | -10.8      | -18.0      | 7.1         | -13.3      | 21.7       | 16.2        |
| Hotel             | 43.9       | -22.8       | -4.2       | 7.7        | -6.6       | -21.3       | 33.3       | 31.8       | 22.5        |
| CIE               | -24.4      | 5.8         | 16.3       | -16.8      | -15.7      | -1.1        | 17.1       | 9.0        | 33.3        |
| Residential       | -1.5       | -3.3        | 12.1       | 1.3        | 1.4        | -2.5        | 1.2        | 1.6        | -8.4        |
| Other             | 139.8      | -31.2       | -36.0      | -6.0       | 2.2        | 38.8        | -30.3      | 26.9       | -1.4        |
| <b>TOTAL</b>      | <b>3.8</b> | <b>-7.5</b> | <b>3.5</b> | <b>2.2</b> | <b>2.1</b> | <b>-1.0</b> | <b>2.3</b> | <b>1.7</b> | <b>-7.3</b> |

## Notes:

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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 | 1999             | 2000             | 2001             | 2002             | 2003             | 2004             | 2005             | 2006             | 2007             | 2008             | Average          |
|-------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Office            | \$261,175        | \$341,707        | \$219,798        | \$151,983        | \$155,286        | \$168,861        | \$196,625        | \$207,926        | \$285,972        | \$166,523        | \$215,586        |
| Retail            | \$289,013        | \$75,063         | \$51,916         | \$46,464         | \$50,590         | \$46,714         | \$45,248         | \$74,662         | \$72,232         | \$47,483         | \$79,939         |
| PDR               | \$17,111         | \$48,712         | \$15,951         | \$9,217          | \$8,023          | \$10,122         | \$7,491          | \$6,872          | \$5,880          | \$6,522          | \$13,590         |
| Hotel             | \$13,605         | \$93,976         | \$18,352         | \$10,157         | \$4,399          | \$2,770          | \$16,249         | \$27,521         | \$29,850         | \$17,606         | \$23,449         |
| CIE               | \$37,546         | \$40,562         | \$30,340         | \$32,952         | \$46,866         | \$105,026        | \$24,618         | \$44,540         | \$38,498         | \$42,379         | \$44,333         |
| Residential       | \$219,297        | \$247,513        | \$226,912        | \$289,823        | \$289,037        | \$251,052        | \$267,900        | \$236,145        | \$297,536        | \$249,453        | \$257,467        |
| Other             | \$759            | \$3,830          | \$1,711          | \$625            | \$779            | \$500            | \$1,491          | \$3,720          | \$4,043          | \$2,549          | \$2,001          |
| <b>TOTAL</b>      | <b>\$838,506</b> | <b>\$851,364</b> | <b>\$564,979</b> | <b>\$541,222</b> | <b>\$554,981</b> | <b>\$585,046</b> | <b>\$559,622</b> | <b>\$601,385</b> | <b>\$734,009</b> | <b>\$532,515</b> | <b>\$636,363</b> |

## Annual Percentage Distribution

| Land Use Category | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 31.1         | 40.1         | 38.9         | 28.1         | 28.0         | 28.9         | 35.1         | 34.6         | 39.0         | 31.3         |
| Retail            | 34.5         | 8.8          | 9.2          | 8.6          | 9.1          | 8.0          | 8.1          | 12.4         | 9.8          | 8.9          |
| PDR               | 2.0          | 5.7          | 2.8          | 1.7          | 1.4          | 1.7          | 1.3          | 1.1          | 0.8          | 1.2          |
| Hotel             | 1.6          | 11.0         | 3.2          | 1.9          | 0.8          | 0.5          | 2.9          | 4.6          | 4.1          | 3.3          |
| CIE               | 4.5          | 4.8          | 5.4          | 6.1          | 8.4          | 18.0         | 4.4          | 7.4          | 5.2          | 8.0          |
| Residential       | 26.2         | 29.1         | 40.2         | 53.5         | 52.1         | 42.9         | 47.9         | 39.3         | 40.5         | 46.8         |
| Other             | 0.1          | 0.4          | 0.3          | 0.1          | 0.1          | 0.1          | 0.3          | 0.6          | 0.6          | 0.5          |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| Land Use Category | 1999-00    | 2000-01      | 2001-02     | 2002-03    | 2003-04    | 2004-05     | 2005-06    | 2006-07     | 2007-08      |
|-------------------|------------|--------------|-------------|------------|------------|-------------|------------|-------------|--------------|
| Office            | 30.8       | -35.7        | -30.9       | 2.2        | 8.7        | 16.4        | 5.7        | 37.5        | -41.8        |
| Retail            | -74.0      | -30.8        | -10.5       | 8.9        | -7.7       | -3.1        | 65.0       | -3.3        | -34.3        |
| PDR               | 184.7      | -67.3        | -42.2       | -13.0      | 26.2       | -26.0       | -8.3       | -14.4       | 10.9         |
| Hotel             | 590.8      | -80.5        | -44.7       | -56.7      | -37.0      | 486.5       | 69.4       | 8.5         | -41.0        |
| CIE               | 8.0        | -25.2        | 8.6         | 42.2       | 124.1      | -76.6       | 80.9       | -13.6       | 10.1         |
| Residential       | 12.9       | -8.3         | 27.7        | -0.3       | -13.1      | 6.7         | -11.9      | 26.0        | -16.2        |
| Other             | 404.7      | -55.3        | -63.5       | 24.6       | -35.7      | 198.0       | 149.4      | 8.7         | -37.0        |
| <b>TOTAL</b>      | <b>1.5</b> | <b>-33.6</b> | <b>-4.2</b> | <b>2.5</b> | <b>5.4</b> | <b>-4.3</b> | <b>7.5</b> | <b>22.1</b> | <b>-27.5</b> |

## Notes:

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

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 | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          | Average        |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Office            | \$63.4        | \$64.4        | \$52.5        | \$47.9        | \$43.4        | \$44.3        | \$46.9        | \$50.4        | \$65.7        | \$44.0        | <b>\$52.3</b>  |
| Retail            | \$137.1       | \$42.5        | \$29.5        | \$27.0        | \$29.1        | \$25.0        | \$27.4        | \$35.1        | \$39.2        | \$24.7        | <b>\$41.7</b>  |
| PDR               | \$63.6        | \$146.7       | \$52.3        | \$39.9        | \$38.9        | \$59.9        | \$41.4        | \$43.8        | \$30.8        | \$29.4        | <b>\$54.7</b>  |
| Hotel             | \$79.6        | \$382.0       | \$96.6        | \$55.8        | \$22.4        | \$15.1        | \$112.8       | \$143.3       | \$118.0       | \$56.8        | <b>\$108.3</b> |
| CIE               | \$69.0        | \$98.7        | \$69.7        | \$65.1        | \$111.3       | \$295.8       | \$70.1        | \$108.4       | \$85.9        | \$71.0        | <b>\$104.5</b> |
| Residential       | \$12.2        | \$14.0        | \$13.2        | \$15.1        | \$14.9        | \$12.7        | \$13.9        | \$12.1        | \$15.0        | \$13.8        | <b>\$13.7</b>  |
| Other             | \$2.8         | \$5.9         | \$3.9         | \$2.2         | \$2.9         | \$1.8         | \$3.9         | \$14.1        | \$12.1        | \$9.4         | <b>\$5.9</b>   |
| <b>TOTAL</b>      | <b>\$32.9</b> | <b>\$32.2</b> | <b>\$23.1</b> | <b>\$21.4</b> | <b>\$21.5</b> | <b>\$22.2</b> | <b>\$21.4</b> | <b>\$22.5</b> | <b>\$27.0</b> | <b>\$21.1</b> | <b>\$24.5</b>  |

## Percentage Change

| Land Use Category | 1999-00     | 2000-01      | 2001-02     | 2001-02    | 2003-04    | 2004-05     | 2005-06    | 2006-07     | 2007-08      |
|-------------------|-------------|--------------|-------------|------------|------------|-------------|------------|-------------|--------------|
| Office            | 1.6         | -18.5        | -8.7        | -9.4       | 2.1        | 5.8         | 7.5        | 30.4        | -32.9        |
| Retail            | -69.0       | -30.6        | -8.5        | 7.9        | -14.3      | 9.8         | 28.0       | 11.7        | -36.9        |
| PDR               | 130.7       | -64.4        | -23.7       | -2.4       | 53.8       | -30.9       | 5.8        | -29.7       | -4.6         |
| Hotel             | 380.2       | -74.7        | -42.2       | -59.8      | -32.6      | 645.4       | 27.0       | -17.7       | -51.9        |
| CIE               | 43.0        | -29.3        | -6.6        | 70.9       | 165.8      | -76.3       | 54.5       | -20.7       | -17.4        |
| Residential       | 14.5        | -5.2         | 13.9        | -1.6       | -14.4      | 9.4         | -12.9      | 24.0        | -8.5         |
| Other             | 110.5       | -35.1        | -42.9       | 32.5       | -37.1      | 114.6       | 258.1      | -14.3       | -21.8        |
| <b>TOTAL</b>      | <b>-2.2</b> | <b>-28.3</b> | <b>-7.4</b> | <b>0.3</b> | <b>3.3</b> | <b>-3.4</b> | <b>5.0</b> | <b>20.0</b> | <b>-21.7</b> |

**Notes:**

- PDR = Production/Distribution/Repair
- 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, 1999-2008**

This table presents the number of building permits filed by Commerce & Industry District (see Section 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    | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          |
|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Bayview         | 667           | 779           | 1,023         | 831           | 765           | 651           | 702           | 702           | 715           | 635           |
| Civic Center    | 780           | 951           | 853           | 738           | 858           | 850           | 801           | 766           | 999           | 897           |
| Financial       | 3,255         | 4,150         | 3,301         | 2,604         | 2,965         | 3,363         | 3,724         | 3,486         | 3,733         | 3,369         |
| Mission         | 1,800         | 2,001         | 1,867         | 2,127         | 2,129         | 2,042         | 2,004         | 2,070         | 1,988         | 1,984         |
| North Beach     | 751           | 791           | 714           | 888           | 814           | 788           | 842           | 840           | 803           | 838           |
| North Central   | 3,315         | 3,355         | 2,914         | 3,581         | 3,781         | 3,575         | 3,602         | 3,844         | 4,052         | 3,499         |
| Northwest       | 2,291         | 2,433         | 2,117         | 2,285         | 2,461         | 2,575         | 2,477         | 2,490         | 2,422         | 2,485         |
| South of Market | 2,482         | 2,517         | 2,113         | 2,053         | 2,035         | 2,038         | 2,116         | 2,512         | 2,259         | 2,254         |
| Southwest       | 9,199         | 9,028         | 8,865         | 9,574         | 9,549         | 9,902         | 9,372         | 9,432         | 9,381         | 8,670         |
| Van Ness        | 1,089         | 1,158         | 1,086         | 1,032         | 1,144         | 1,140         | 1,063         | 1,175         | 1,509         | 1,192         |
| Unclassified    | 945           | 268           | 408           | 199           | 150           | 153           | 132           | 89            | 137           | 87            |
| <b>TOTAL</b>    | <b>26,574</b> | <b>27,431</b> | <b>25,261</b> | <b>25,912</b> | <b>26,651</b> | <b>27,077</b> | <b>26,835</b> | <b>27,406</b> | <b>27,998</b> | <b>25,910</b> |

Annual Percentage Distribution

| C&I District    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 2.5          | 2.8          | 4.0          | 3.2          | 2.9          | 2.4          | 2.6          | 2.6          | 2.6          | 2.5          |
| Civic Center    | 2.9          | 3.5          | 3.4          | 2.8          | 3.2          | 3.1          | 3.0          | 2.8          | 3.6          | 3.5          |
| Financial       | 12.2         | 15.1         | 13.1         | 10.0         | 11.1         | 12.4         | 13.9         | 12.7         | 13.3         | 13.0         |
| Mission         | 6.8          | 7.3          | 7.4          | 8.2          | 8.0          | 7.5          | 7.5          | 7.6          | 7.1          | 7.7          |
| North Beach     | 2.8          | 2.9          | 2.8          | 3.4          | 3.1          | 2.9          | 3.1          | 3.1          | 2.9          | 3.2          |
| North Central   | 12.5         | 12.2         | 11.5         | 13.8         | 14.2         | 13.2         | 13.4         | 14.0         | 14.5         | 13.5         |
| Northwest       | 8.6          | 8.9          | 8.4          | 8.8          | 9.2          | 9.5          | 9.2          | 9.1          | 8.7          | 9.6          |
| South of Market | 9.3          | 9.2          | 8.4          | 7.9          | 7.6          | 7.5          | 7.9          | 9.2          | 8.1          | 8.7          |
| Southwest       | 34.6         | 32.9         | 35.1         | 36.9         | 35.8         | 36.6         | 34.9         | 34.4         | 33.5         | 33.5         |
| Van Ness        | 4.1          | 4.2          | 4.3          | 4.0          | 4.3          | 4.2          | 4.0          | 4.3          | 5.4          | 4.6          |
| Unclassified    | 3.6          | 1.0          | 1.6          | 0.8          | 0.6          | 0.6          | 0.5          | 0.3          | 0.5          | 0.3          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

Percentage Change

| C&I District    | 1999-00    | 2000-01     | 2001-02    | 2002-03    | 2003-04    | 2004-05     | 2005-06    | 2006-07    | 2007-08     |
|-----------------|------------|-------------|------------|------------|------------|-------------|------------|------------|-------------|
| Bayview         | 16.8       | 31.3        | -18.8      | -7.9       | -14.9      | 7.8         | 0.0        | 1.9        | -11.2       |
| Civic Center    | 21.9       | -10.3       | -13.5      | 16.3       | -0.9       | -5.8        | -4.4       | 30.4       | -10.2       |
| Financial       | 27.5       | -20.5       | -21.1      | 13.9       | 13.4       | 10.7        | -6.4       | 7.1        | -9.8        |
| Mission         | 11.2       | -6.7        | 13.9       | 0.1        | -4.1       | -1.9        | 3.3        | -4.0       | -0.2        |
| North Beach     | 5.3        | -9.7        | 24.4       | -8.3       | -3.2       | 6.9         | -0.2       | -4.4       | 4.4         |
| North Central   | 1.2        | -13.1       | 22.9       | 5.6        | -5.4       | 0.8         | 6.7        | 5.4        | -13.6       |
| Northwest       | 6.2        | -13.0       | 7.9        | 7.7        | 4.6        | -3.8        | 0.5        | -2.7       | 2.6         |
| South of Market | 1.4        | -16.1       | -2.8       | -0.9       | 0.1        | 3.8         | 18.7       | -10.1      | -0.2        |
| Southwest       | -1.9       | -1.8        | 8.0        | -0.3       | 3.7        | -5.4        | 0.6        | -0.5       | -7.6        |
| Van Ness        | 6.3        | -6.2        | -5.0       | 10.9       | -0.3       | -6.8        | 10.5       | 28.4       | -21.0       |
| Unclassified    | -71.6      | 52.2        | -51.2      | -24.6      | 2.0        | -13.7       | -32.6      | 53.9       | -36.5       |
| <b>TOTAL</b>    | <b>3.2</b> | <b>-7.9</b> | <b>2.6</b> | <b>2.9</b> | <b>1.6</b> | <b>-0.9</b> | <b>2.1</b> | <b>2.2</b> | <b>-7.5</b> |

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, 1999-2008**

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    | 1999               | 2000               | 2001               | 2002               | 2003             | 2004               | 2005               | 2006               | 2007               | 2008             |
|-----------------|--------------------|--------------------|--------------------|--------------------|------------------|--------------------|--------------------|--------------------|--------------------|------------------|
| Bayview         | \$45,184           | \$139,064          | \$39,034           | \$22,039           | \$24,288         | \$26,638           | \$68,911           | \$31,846           | \$59,991           | \$9,481          |
| Civic Center    | \$37,821           | \$77,535           | \$91,014           | \$76,318           | \$51,815         | \$44,643           | \$37,247           | \$70,427           | \$46,157           | \$32,085         |
| Financial       | \$311,004          | \$639,353          | \$199,284          | \$269,136          | \$189,814        | \$335,011          | \$334,856          | \$256,927          | \$206,042          | \$192,645        |
| Mission         | \$42,758           | \$87,586           | \$43,060           | \$46,891           | \$43,451         | \$38,903           | \$50,569           | \$51,277           | \$94,178           | \$27,648         |
| North Beach     | \$29,259           | \$27,976           | \$17,654           | \$69,510           | \$23,739         | \$24,274           | \$16,853           | \$22,985           | \$15,062           | \$16,613         |
| North Central   | \$108,873          | \$79,242           | \$67,449           | \$68,143           | \$75,805         | \$75,600           | \$64,020           | \$186,443          | \$98,961           | \$87,220         |
| Northwest       | \$54,345           | \$58,529           | \$61,017           | \$42,026           | \$38,631         | \$41,461           | \$40,921           | \$43,595           | \$63,908           | \$41,473         |
| South of Market | \$397,591          | \$523,482          | \$223,719          | \$252,158          | \$136,431        | \$164,524          | \$385,033          | \$262,220          | \$276,617          | \$168,748        |
| Southwest       | \$185,417          | \$220,112          | \$166,320          | \$164,656          | \$168,559        | \$208,312          | \$149,324          | \$135,044          | \$136,945          | \$122,339        |
| Van Ness        | \$32,395           | \$48,230           | \$51,155           | \$32,851           | \$41,485         | \$37,462           | \$73,567           | \$45,162           | \$86,344           | \$27,607         |
| Unclassified    | \$30,664           | \$21,948           | \$59,091           | \$2,608            | \$21,577         | \$10,909           | \$1,316            | \$19,635           | \$1,619            | \$1,411          |
| <b>TOTAL</b>    | <b>\$1,275,310</b> | <b>\$1,923,057</b> | <b>\$1,018,798</b> | <b>\$1,046,337</b> | <b>\$815,595</b> | <b>\$1,007,737</b> | <b>\$1,222,617</b> | <b>\$1,125,561</b> | <b>\$1,085,824</b> | <b>\$727,270</b> |

## Annual Percentage Distribution

| C&I District    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 3.5          | 7.2          | 3.8          | 2.1          | 3.0          | 2.6          | 5.6          | 2.8          | 5.5          | 1.3          |
| Civic Center    | 3.0          | 4.0          | 8.9          | 7.3          | 6.4          | 4.4          | 3.0          | 6.3          | 4.3          | 4.4          |
| Financial       | 24.4         | 33.2         | 19.6         | 25.7         | 23.3         | 33.2         | 27.4         | 22.8         | 19.0         | 26.5         |
| Mission         | 3.4          | 4.6          | 4.2          | 4.5          | 5.3          | 3.9          | 4.1          | 4.6          | 8.7          | 3.8          |
| North Beach     | 2.3          | 1.5          | 1.7          | 6.6          | 2.9          | 2.4          | 1.4          | 2.0          | 1.4          | 2.3          |
| North Central   | 8.5          | 4.1          | 6.6          | 6.5          | 9.3          | 7.5          | 5.2          | 16.6         | 9.1          | 12.0         |
| Northwest       | 4.3          | 3.0          | 6.0          | 4.0          | 4.7          | 4.1          | 3.3          | 3.9          | 5.9          | 5.7          |
| South of Market | 31.2         | 27.2         | 22.0         | 24.1         | 16.7         | 16.3         | 31.5         | 23.3         | 25.5         | 23.2         |
| Southwest       | 14.5         | 11.4         | 16.3         | 15.7         | 20.7         | 20.7         | 12.2         | 12.0         | 12.6         | 16.8         |
| Van Ness        | 2.5          | 2.5          | 5.0          | 3.1          | 5.1          | 3.7          | 6.0          | 4.0          | 8.0          | 3.8          |
| Unclassified    | 2.4          | 1.1          | 5.8          | 0.2          | 2.6          | 1.1          | 0.1          | 1.7          | 0.1          | 0.2          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| C&I District    | 1999-00     | 2000-01      | 2001-02    | 2002-03      | 2003-04     | 2004-05     | 2005-06     | 2006-07     | 2007-08      |
|-----------------|-------------|--------------|------------|--------------|-------------|-------------|-------------|-------------|--------------|
| Bayview         | 207.8       | -71.9        | -43.5      | 10.2         | 9.7         | 158.7       | -53.8       | 88.4        | -84.2        |
| Civic Center    | 105.0       | 17.4         | -16.1      | -32.1        | -13.8       | -16.6       | 89.1        | -34.5       | -30.5        |
| Financial       | 105.6       | -68.8        | 35.1       | -29.5        | 76.5        | -0.0        | -23.3       | -19.8       | -6.5         |
| Mission         | 104.8       | -50.8        | 8.9        | -7.3         | -10.5       | 30.0        | 1.4         | 83.7        | -70.6        |
| North Beach     | -4.4        | -36.9        | 293.7      | -65.8        | 2.3         | -30.6       | 36.4        | -34.5       | 10.3         |
| North Central   | -27.2       | -14.9        | 1.0        | 11.2         | -0.3        | -15.3       | 191.2       | -46.9       | -11.9        |
| Northwest       | 7.7         | 4.3          | -31.1      | -8.1         | 7.3         | -1.3        | 6.5         | 46.6        | -5.1         |
| South of Market | 31.7        | -57.3        | 12.7       | -45.9        | 20.6        | 134.0       | -31.9       | 5.5         | -39.0        |
| Southwest       | 18.7        | -24.4        | -1.0       | 2.4          | 23.6        | -28.3       | -9.6        | 1.4         | -10.7        |
| Van Ness        | 48.9        | 6.1          | -35.8      | 26.3         | -9.7        | 96.4        | -38.6       | 91.2        | -68.0        |
| Unclassified    | -28.4       | 169.2        | -95.6      | 727.4        | -49.4       | -87.9       | 1392.2      | -91.8       | -12.8        |
| <b>TOTAL</b>    | <b>50.8</b> | <b>-47.0</b> | <b>2.7</b> | <b>-22.1</b> | <b>23.6</b> | <b>21.3</b> | <b>-7.9</b> | <b>-3.5</b> | <b>-33.0</b> |

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, 1999-2008**

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            | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Bayview                 | \$67.7        | \$178.5       | \$38.2        | \$26.5        | \$31.7        | \$40.9        | \$98.2        | \$45.4        | \$83.9        | \$14.9        |
| Civic Center            | \$48.5        | \$81.5        | \$106.7       | \$103.4       | \$60.4        | \$52.5        | \$46.5        | \$91.9        | \$46.2        | \$35.8        |
| Financial               | \$95.5        | \$154.1       | \$60.4        | \$103.4       | \$64.0        | \$99.6        | \$89.9        | \$73.7        | \$55.2        | \$57.2        |
| Mission                 | \$23.8        | \$43.8        | \$23.1        | \$22.0        | \$20.4        | \$19.1        | \$25.2        | \$24.8        | \$47.4        | \$13.9        |
| North Beach             | \$39.0        | \$35.4        | \$24.7        | \$78.3        | \$29.2        | \$30.8        | \$20.0        | \$27.4        | \$18.8        | \$19.8        |
| North Central           | \$32.8        | \$23.6        | \$23.1        | \$19.0        | \$20.0        | \$21.1        | \$17.8        | \$48.5        | \$24.4        | \$24.9        |
| Northwest               | \$23.7        | \$24.1        | \$28.8        | \$18.4        | \$15.7        | \$16.1        | \$16.5        | \$17.5        | \$26.4        | \$16.7        |
| South of Market         | \$160.2       | \$208.0       | \$105.9       | \$122.8       | \$67.0        | \$80.7        | \$182.0       | \$104.4       | \$122.5       | \$74.9        |
| Southwest               | \$20.2        | \$24.4        | \$18.8        | \$17.2        | \$17.7        | \$21.0        | \$15.9        | \$14.3        | \$14.6        | \$14.1        |
| Van Ness                | \$29.7        | \$41.6        | \$47.1        | \$31.8        | \$36.3        | \$32.9        | \$69.2        | \$38.4        | \$57.2        | \$23.2        |
| Unclassified            | \$32.4        | \$81.9        | \$144.8       | \$13.1        | \$143.8       | \$71.3        | \$10.0        | \$220.6       | \$11.8        | \$16.2        |
| <b>Citywide Average</b> | <b>\$48.0</b> | <b>\$70.1</b> | <b>\$40.3</b> | <b>\$40.4</b> | <b>\$30.6</b> | <b>\$37.2</b> | <b>\$45.6</b> | <b>\$41.1</b> | <b>\$38.8</b> | <b>\$28.1</b> |

## Percentage Change

| C&I District            | 1999-00     | 2000-01      | 2001-02    | 2001-02      | 2003-04     | 2004-05     | 2005-06     | 2006-07     | 2007-08      |
|-------------------------|-------------|--------------|------------|--------------|-------------|-------------|-------------|-------------|--------------|
| Bayview                 | 163.5       | -78.6        | -30.5      | 19.7         | 28.9        | 139.9       | -53.8       | 85.0        | -82.2        |
| Civic Center            | 68.1        | 30.9         | -3.1       | -41.6        | -13.0       | -11.5       | 97.7        | -49.7       | -22.6        |
| Financial               | 61.2        | -60.8        | 71.2       | -38.1        | 55.6        | -9.7        | -18.0       | -25.1       | 3.6          |
| Mission                 | 84.3        | -47.3        | -4.4       | -7.4         | -6.7        | 32.5        | -1.8        | 91.2        | -70.6        |
| North Beach             | -9.2        | -30.1        | 216.6      | -62.7        | 5.6         | -35.0       | 36.7        | -31.5       | 5.7          |
| North Central           | -28.1       | -2.0         | -17.8      | 5.4          | 5.5         | -16.0       | 172.9       | -49.6       | 2.1          |
| Northwest               | 1.4         | 19.8         | -36.2      | -14.7        | 2.6         | 2.6         | 6.0         | 50.7        | -36.8        |
| South of Market         | 29.8        | -49.1        | 16.0       | -45.4        | 20.4        | 125.4       | -42.6       | 17.3        | -38.9        |
| Southwest               | 21.0        | -23.0        | -8.3       | 2.6          | 19.2        | -24.3       | -10.1       | 2.0         | -3.3         |
| Van Ness                | 40.0        | 13.1         | -32.4      | 13.9         | -9.4        | 110.6       | -44.5       | 48.9        | -59.5        |
| Unclassified            | 152.4       | 76.8         | -91.0      | 997.7        | -50.4       | -86.0       | 2,113.1     | -94.6       | 37.2         |
| <b>Citywide Average</b> | <b>46.1</b> | <b>-42.5</b> | <b>0.1</b> | <b>-24.2</b> | <b>21.6</b> | <b>22.4</b> | <b>-9.9</b> | <b>-5.6</b> | <b>-27.6</b> |

## Sources:

- San Francisco Planning Department
- Department of Building Inspection



**TABLE 6.2.2.A BUILDING PERMITS FOR NEW CONSTRUCTION  
BY COMMERCE & INDUSTRY DISTRICT, 1999-2008**

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    | 1999       | 2000       | 2001       | 2002       | 2003       | 2004       | 2005       | 2006       | 2007       | 2008       |
|-----------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Bayview         | 44         | 40         | 38         | 30         | 8          | 23         | 34         | 27         | 15         | 16         |
| Civic Center    | 3          | 8          | 4          | 7          | 4          | 4          | 4          | 3          | 2          | 4          |
| Financial       | 4          | 19         | 5          | 1          | 3          | 6          | 9          | 6          | 6          | 3          |
| Mission         | 38         | 50         | 21         | 26         | 33         | 22         | 30         | 28         | 31         | 8          |
| North Beach     | 4          | 6          | 3          | 23         | 6          | 5          | 4          | 1          | 0          | 1          |
| North Central   | 61         | 23         | 20         | 13         | 17         | 16         | 41         | 23         | 18         | 14         |
| Northwest       | 54         | 33         | 31         | 17         | 16         | 8          | 10         | 16         | 12         | 7          |
| South of Market | 71         | 79         | 36         | 25         | 39         | 31         | 38         | 31         | 21         | 20         |
| Southwest       | 194        | 154        | 147        | 115        | 109        | 101        | 86         | 74         | 67         | 56         |
| Van Ness        | 9          | 12         | 6          | 4          | 8          | 6          | 23         | 11         | 11         | 2          |
| Unclassified    | 3          | 6          | 2          | 4          | 45         | 3          | 5          | 10         | 5          | 2          |
| <b>TOTAL</b>    | <b>485</b> | <b>430</b> | <b>313</b> | <b>265</b> | <b>288</b> | <b>225</b> | <b>284</b> | <b>230</b> | <b>188</b> | <b>133</b> |

## Annual Percentage Distribution

| C&I District    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 9.1          | 9.3          | 12.1         | 11.3         | 2.8          | 10.2         | 12.0         | 11.7         | 8.0          | 12.0         |
| Civic Center    | 0.6          | 1.9          | 1.3          | 2.6          | 1.4          | 1.8          | 1.4          | 1.3          | 1.1          | 3.0          |
| Financial       | 0.8          | 4.4          | 1.6          | 0.4          | 1.0          | 2.7          | 3.2          | 2.6          | 3.2          | 2.3          |
| Mission         | 7.8          | 11.6         | 6.7          | 9.8          | 11.5         | 9.8          | 10.6         | 12.2         | 16.5         | 6.0          |
| North Beach     | 0.8          | 1.4          | 1.0          | 8.7          | 2.1          | 2.2          | 1.4          | 0.4          | 0.0          | 0.8          |
| North Central   | 12.6         | 5.3          | 6.4          | 4.9          | 5.9          | 7.1          | 14.4         | 10.0         | 9.6          | 10.5         |
| Northwest       | 11.1         | 7.7          | 9.9          | 6.4          | 5.6          | 3.6          | 3.5          | 7.0          | 6.4          | 5.3          |
| South of Market | 14.6         | 18.4         | 11.5         | 9.4          | 13.5         | 13.8         | 13.4         | 13.5         | 11.2         | 15.0         |
| Southwest       | 40.0         | 35.8         | 47.0         | 43.4         | 37.8         | 44.9         | 30.3         | 32.2         | 35.6         | 42.1         |
| Van Ness        | 1.9          | 2.8          | 1.9          | 1.5          | 2.8          | 2.7          | 8.1          | 4.8          | 5.9          | 1.5          |
| Unclassified    | 0.6          | 1.4          | 0.6          | 1.5          | 15.6         | 1.3          | 1.8          | 4.3          | 2.7          | 1.5          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| C&I District    | 1999-00      | 2000-01      | 2001-02      | 2002-03    | 2003-04      | 2004-05     | 2005-06      | 2006-07      | 2007-08      |
|-----------------|--------------|--------------|--------------|------------|--------------|-------------|--------------|--------------|--------------|
| Bayview         | -9.1         | -5.0         | -21.1        | -73.3      | 187.5        | 47.8        | -20.6        | -44.4        | 6.7          |
| Civic Center    | 166.7        | -50.0        | 75.0         | -42.9      | 0.0          | 0.0         | -25.0        | -33.3        | 100.0        |
| Financial       | 375.0        | -73.7        | -80.0        | 200.0      | 100.0        | 50.0        | -33.3        | 0.0          | -50.0        |
| Mission         | 31.6         | -58.0        | 23.8         | 26.9       | -33.3        | 36.4        | -6.7         | 10.7         | -74.2        |
| North Beach     | 50.0         | -50.0        | 666.7        | -73.9      | -16.7        | -20.0       | -75.0        | -100.0       | -            |
| North Central   | -62.3        | -13.0        | -35.0        | 30.8       | -5.9         | 156.3       | -43.9        | -21.7        | -22.2        |
| Northwest       | -38.9        | -6.1         | -45.2        | -5.9       | -50.0        | 25.0        | 60.0         | -25.0        | -41.7        |
| South of Market | 11.3         | -54.4        | -30.6        | 56.0       | -20.5        | 22.6        | -18.4        | -32.3        | -4.8         |
| Southwest       | -20.6        | -4.5         | -21.8        | -5.2       | -7.3         | -14.9       | -14.0        | -9.5         | -16.4        |
| Van Ness        | 33.3         | -50.0        | -33.3        | 100.0      | -25.0        | 283.3       | -52.2        | 0.0          | -81.8        |
| Unclassified    | 100.0        | -66.7        | 100.0        | 1025.0     | -93.3        | 66.7        | 100.0        | -50.0        | -60.0        |
| <b>TOTAL</b>    | <b>-11.3</b> | <b>-27.2</b> | <b>-15.3</b> | <b>8.7</b> | <b>-21.9</b> | <b>26.2</b> | <b>-19.0</b> | <b>-18.3</b> | <b>-29.3</b> |

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1999-2008**

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    | 1999             | 2000               | 2001             | 2002             | 2003             | 2004             | 2005             | 2006             | 2007             | 2008             |
|-----------------|------------------|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Bayview         | \$33,003         | \$111,560          | \$25,716         | \$7,908          | \$8,488          | \$12,786         | \$57,640         | \$8,256          | \$29,012         | \$2,088          |
| Civic Center    | \$4,734          | \$14,173           | \$41,941         | \$50,685         | \$13,011         | \$6,579          | \$16,590         | \$36,173         | \$797            | \$4,904          |
| Financial       | \$79,800         | \$305,853          | \$35,501         | \$106,337        | \$21,546         | \$192,254        | \$151,456        | \$105,078        | \$37,556         | \$4,554          |
| Mission         | \$19,003         | \$35,149           | \$11,632         | \$19,940         | \$18,060         | \$18,335         | \$25,690         | \$31,414         | \$61,184         | \$1,699          |
| North Beach     | \$12,894         | \$5,567            | \$1,054          | \$50,840         | \$3,456          | \$3,882          | \$2,260          | \$457            | \$0              | \$1,875          |
| North Central   | \$57,420         | \$15,852           | \$8,862          | \$12,182         | \$22,068         | \$27,971         | \$6,065          | \$111,152        | \$20,638         | \$34,056         |
| Northwest       | \$23,634         | \$18,486           | \$28,988         | \$5,297          | \$7,299          | \$3,675          | \$6,550          | \$4,165          | \$30,990         | \$7,425          |
| South of Market | \$111,307        | \$399,808          | \$144,524        | \$185,276        | \$66,333         | \$94,819         | \$313,439        | \$159,029        | \$91,418         | \$103,497        |
| Southwest       | \$67,576         | \$126,396          | \$71,340         | \$55,350         | \$59,611         | \$33,341         | \$26,144         | \$26,366         | \$22,409         | \$29,019         |
| Van Ness        | \$5,694          | \$15,917           | \$21,781         | \$8,325          | \$22,021         | \$13,106         | \$53,606         | \$10,277         | \$46,826         | \$2,234          |
| Unclassified    | \$15,919         | \$16,507           | \$51,762         | \$471            | \$16,100         | \$8,377          | \$665            | \$17,651         | \$594            | \$707            |
| <b>TOTAL</b>    | <b>\$430,985</b> | <b>\$1,065,268</b> | <b>\$443,100</b> | <b>\$502,611</b> | <b>\$257,995</b> | <b>\$415,126</b> | <b>\$660,105</b> | <b>\$510,018</b> | <b>\$341,423</b> | <b>\$192,058</b> |

## Annual Percentage Distribution

| C&I District    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 7.7          | 10.5         | 5.8          | 1.6          | 3.3          | 3.1          | 8.7          | 1.6          | 8.5          | 1.1          |
| Civic Center    | 1.1          | 1.3          | 9.5          | 10.1         | 5.0          | 1.6          | 2.5          | 7.1          | 0.2          | 2.6          |
| Financial       | 18.5         | 28.7         | 8.0          | 21.2         | 8.4          | 46.3         | 22.9         | 20.6         | 11.0         | 2.4          |
| Mission         | 4.4          | 3.3          | 2.6          | 4.0          | 7.0          | 4.4          | 3.9          | 6.2          | 17.9         | 0.9          |
| North Beach     | 3.0          | 0.5          | 0.2          | 10.1         | 1.3          | 0.9          | 0.3          | 0.1          | 0.0          | 1.0          |
| North Central   | 13.3         | 1.5          | 2.0          | 2.4          | 8.6          | 6.7          | 0.9          | 21.8         | 6.0          | 17.7         |
| Northwest       | 5.5          | 1.7          | 6.5          | 1.1          | 2.8          | 0.9          | 1.0          | 0.8          | 9.1          | 3.9          |
| South of Market | 25.8         | 37.5         | 32.6         | 36.9         | 25.7         | 22.8         | 47.5         | 31.2         | 26.8         | 53.9         |
| Southwest       | 15.7         | 11.9         | 16.1         | 11.0         | 23.1         | 8.0          | 4.0          | 5.2          | 6.6          | 15.1         |
| Van Ness        | 1.3          | 1.5          | 4.9          | 1.7          | 8.5          | 3.2          | 8.1          | 2.0          | 13.7         | 1.2          |
| Unclassified    | 3.7          | 1.5          | 11.7         | 0.1          | 6.2          | 2.0          | 0.1          | 3.5          | 0.2          | 0.4          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| C&I District    | 1999-00      | 2000-01      | 2001-02     | 2002-03      | 2003-04     | 2004-05     | 2005-06      | 2006-07      | 2007-08      |
|-----------------|--------------|--------------|-------------|--------------|-------------|-------------|--------------|--------------|--------------|
| Bayview         | 238.0        | -76.9        | -69.2       | 7.3          | 50.6        | 350.8       | -85.7        | 251.4        | -92.8        |
| Civic Center    | 199.4        | 195.9        | 20.8        | -74.3        | -49.4       | 152.2       | 118.0        | -97.8        | 515.1        |
| Financial       | 283.3        | -88.4        | 199.5       | -79.7        | 792.3       | -21.2       | -30.6        | -64.3        | -87.9        |
| Mission         | 85.0         | -66.9        | 71.4        | -9.4         | 1.5         | 40.1        | 22.3         | 94.8         | -97.2        |
| North Beach     | -56.8        | -81.1        | 4,725.7     | -93.2        | 12.3        | -41.8       | -79.8        | -100.0       | -            |
| North Central   | -72.4        | -44.1        | 37.5        | 81.2         | 26.7        | -78.3       | 1,732.7      | -81.4        | 65.0         |
| Northwest       | -21.8        | 56.8         | -81.7       | 37.8         | -49.6       | 78.2        | -36.4        | 644.1        | -76.0        |
| South of Market | 259.2        | -63.9        | 28.2        | -64.2        | 42.9        | 230.6       | -49.3        | -42.5        | 13.2         |
| Southwest       | 87.0         | -43.6        | -22.4       | 7.7          | -44.1       | -21.6       | 0.8          | -15.0        | 29.5         |
| Van Ness        | 179.5        | 36.8         | -61.8       | 164.5        | -40.5       | 309.0       | -80.8        | 355.6        | -95.2        |
| Unclassified    | 3.7          | 213.6        | -99.1       | 3,318.8      | -48.0       | -92.1       | 2,555.8      | -96.6        | 19.1         |
| <b>TOTAL</b>    | <b>147.2</b> | <b>-58.4</b> | <b>13.4</b> | <b>-48.7</b> | <b>60.9</b> | <b>59.0</b> | <b>-22.7</b> | <b>-33.1</b> | <b>-43.7</b> |

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.2.2.C AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1999-2008**

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            | 1999           | 2000             | 2001             | 2002             | 2003           | 2004             | 2005             | 2006             | 2007             | 2008             |
|-------------------------|----------------|------------------|------------------|------------------|----------------|------------------|------------------|------------------|------------------|------------------|
| Bayview                 | \$750.1        | \$2,789.0        | \$676.7          | \$263.6          | \$1,061.0      | \$555.9          | \$1,695.3        | \$305.8          | \$1,934.1        | \$130.5          |
| Civic Center            | \$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          | \$1,226.0        |
| Financial               | \$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        | \$1,518.0        |
| Mission                 | \$500.1        | \$703.0          | \$553.9          | \$766.9          | \$547.3        | \$833.4          | \$856.3          | \$1,121.9        | \$1,973.7        | \$212.4          |
| North Beach             | \$3,223.5      | \$927.8          | \$351.2          | \$2,210.4        | \$576.1        | \$776.3          | \$564.9          | \$457.0          | -                | \$1,875.0        |
| North Central           | \$941.3        | \$689.2          | \$443.1          | \$937.1          | \$1,298.1      | \$1,748.2        | \$147.9          | \$4,832.7        | \$1,146.5        | \$2,432.6        |
| Northwest               | \$437.7        | \$560.2          | \$935.1          | \$311.6          | \$456.2        | \$459.4          | \$655.0          | \$260.3          | \$2,582.5        | \$1,060.7        |
| South of Market         | \$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        | \$5,174.9        |
| Southwest               | \$348.3        | \$820.8          | \$485.3          | \$481.3          | \$546.9        | \$330.1          | \$304.0          | \$356.3          | \$334.5          | \$518.2          |
| Van Ness                | \$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        | \$1,117.0        |
| Unclassified            | \$5,306.4      | \$2,751.2        | \$25,880.8       | \$117.7          | \$357.8        | \$2,792.4        | \$132.9          | \$1,765.1        | \$118.7          | \$353.5          |
| <b>Citywide Average</b> | <b>\$888.6</b> | <b>\$2,477.4</b> | <b>\$1,415.7</b> | <b>\$1,896.6</b> | <b>\$895.8</b> | <b>\$1,845.0</b> | <b>\$2,324.3</b> | <b>\$2,217.5</b> | <b>\$1,816.1</b> | <b>\$1,444.0</b> |

## Percentage Change

| C&I District            | 1999-00      | 2000-01      | 2001-02     | 2001-02      | 2003-04      | 2004-05     | 2005-06     | 2006-07      | 2007-08      |
|-------------------------|--------------|--------------|-------------|--------------|--------------|-------------|-------------|--------------|--------------|
| Bayview                 | 271.8        | -75.7        | -61.0       | 302.5        | -47.6        | 204.9       | -82.0       | 532.5        | -93.5        |
| Civic Center            | 12.3         | 491.9        | -30.9       | -55.1        | -49.4        | 152.2       | 190.7       | -96.7        | 207.5        |
| Financial               | -19.3        | -55.9        | 1,397.7     | -93.2        | 346.2        | -47.5       | 4.1         | -64.3        | -75.7        |
| Mission                 | 40.6         | -21.2        | 38.5        | -28.6        | 52.3         | 2.8         | 31.0        | 75.9         | -89.2        |
| North Beach             | -71.2        | -62.2        | 529.4       | -73.9        | 34.8         | -27.2       | -19.1       | -            | -            |
| North Central           | -26.8        | -35.7        | 111.5       | 38.5         | 34.7         | -91.5       | 3,167.0     | -76.3        | 112.2        |
| Northwest               | 28.0         | 66.9         | -66.7       | 46.4         | 0.7          | 42.6        | -60.3       | 892.1        | -58.9        |
| South of Market         | 222.8        | -20.7        | 84.6        | -77.0        | 79.8         | 169.7       | -37.8       | -15.1        | 18.9         |
| Southwest               | 135.6        | -40.9        | -0.8        | 13.6         | -39.6        | -7.9        | 17.2        | -6.1         | 54.9         |
| Van Ness                | 109.7        | 173.7        | -42.7       | 32.3         | -20.6        | 6.7         | -59.9       | 355.6        | -73.8        |
| Unclassified            | -48.2        | 840.7        | -99.5       | 203.9        | 680.5        | -95.2       | 1,227.9     | -93.3        | 197.7        |
| <b>Citywide Average</b> | <b>178.8</b> | <b>-42.9</b> | <b>34.0</b> | <b>-52.8</b> | <b>106.0</b> | <b>26.0</b> | <b>-4.6</b> | <b>-18.1</b> | <b>-20.5</b> |

## Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.2.3.A BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 1999-2008**

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    | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          |
|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Bayview         | 605           | 719           | 956           | 788           | 748           | 617           | 656           | 655           | 691           | 603           |
| Civic Center    | 726           | 919           | 819           | 701           | 814           | 819           | 764           | 736           | 956           | 841           |
| Financial       | 3,148         | 4,015         | 3,198         | 2,526         | 2,886         | 3,267         | 3,629         | 3,419         | 3,629         | 3,237         |
| Mission         | 1,737         | 1,923         | 1,820         | 2,087         | 2,062         | 2,003         | 1,954         | 2,025         | 1,929         | 1,951         |
| North Beach     | 721           | 743           | 688           | 841           | 774           | 757           | 829           | 823           | 789           | 810           |
| North Central   | 3,206         | 3,285         | 2,853         | 3,537         | 3,703         | 3,515         | 3,510         | 3,780         | 3,965         | 3,427         |
| Northwest       | 2,214         | 2,360         | 2,065         | 2,254         | 2,400         | 2,550         | 2,453         | 2,443         | 2,357         | 2,447         |
| South of Market | 2,259         | 2,332         | 1,981         | 1,951         | 1,917         | 1,923         | 2,000         | 2,367         | 2,102         | 2,143         |
| Southwest       | 8,918         | 8,788         | 8,642         | 9,420         | 9,355         | 9,717         | 9,214         | 9,285         | 9,206         | 8,532         |
| Van Ness        | 1,044         | 1,103         | 1,054         | 1,008         | 1,109         | 1,095         | 1,025         | 1,152         | 1,467         | 1,153         |
| Unclassified    | 897           | 250           | 385           | 195           | 96            | 140           | 117           | 70            | 124           | 84            |
| <b>TOTAL</b>    | <b>25,475</b> | <b>26,437</b> | <b>24,461</b> | <b>25,308</b> | <b>25,864</b> | <b>26,403</b> | <b>26,151</b> | <b>26,755</b> | <b>27,215</b> | <b>25,228</b> |

Annual Percentage Distribution

| C&I District    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 2.4          | 2.7          | 3.9          | 3.1          | 2.9          | 2.3          | 2.5          | 2.4          | 2.5          | 2.4          |
| Civic Center    | 2.8          | 3.5          | 3.3          | 2.8          | 3.1          | 3.1          | 2.9          | 2.8          | 3.5          | 3.3          |
| Financial       | 12.4         | 15.2         | 13.1         | 10.0         | 11.2         | 12.4         | 13.9         | 12.8         | 13.3         | 12.8         |
| Mission         | 6.8          | 7.3          | 7.4          | 8.2          | 8.0          | 7.6          | 7.5          | 7.6          | 7.1          | 7.7          |
| North Beach     | 2.8          | 2.8          | 2.8          | 3.3          | 3.0          | 2.9          | 3.2          | 3.1          | 2.9          | 3.2          |
| North Central   | 12.6         | 12.4         | 11.7         | 14.0         | 14.3         | 13.3         | 13.4         | 14.1         | 14.6         | 13.6         |
| Northwest       | 8.7          | 8.9          | 8.4          | 8.9          | 9.3          | 9.7          | 9.4          | 9.1          | 8.7          | 9.7          |
| South of Market | 8.9          | 8.8          | 8.1          | 7.7          | 7.4          | 7.3          | 7.6          | 8.8          | 7.7          | 8.5          |
| Southwest       | 35.0         | 33.2         | 35.3         | 37.2         | 36.2         | 36.8         | 35.2         | 34.7         | 33.8         | 33.8         |
| Van Ness        | 4.1          | 4.2          | 4.3          | 4.0          | 4.3          | 4.1          | 3.9          | 4.3          | 5.4          | 4.6          |
| Unclassified    | 3.5          | 0.9          | 1.6          | 0.8          | 0.4          | 0.5          | 0.4          | 0.3          | 0.5          | 0.3          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

Percentage Change

| C&I District    | 1999-00    | 2000-01     | 2001-02    | 2002-03    | 2003-04    | 2004-05     | 2005-06    | 2006-07    | 2007-08     |
|-----------------|------------|-------------|------------|------------|------------|-------------|------------|------------|-------------|
| Bayview         | 18.8       | 33.0        | -17.6      | -5.1       | -17.5      | 6.3         | -0.2       | 5.5        | -12.7       |
| Civic Center    | 26.6       | -10.9       | -14.4      | 16.1       | 0.6        | -6.7        | -3.7       | 29.9       | -12.0       |
| Financial       | 27.5       | -20.3       | -21.0      | 14.3       | 13.2       | 11.1        | -5.8       | 6.1        | -10.8       |
| Mission         | 10.7       | -5.4        | 14.7       | -1.2       | -2.9       | -2.4        | 3.6        | -4.7       | 1.1         |
| North Beach     | 3.1        | -7.4        | 22.2       | -8.0       | -2.2       | 9.5         | -0.7       | -4.1       | 2.7         |
| North Central   | 2.5        | -13.2       | 24.0       | 4.7        | -5.1       | -0.1        | 7.7        | 4.9        | -13.6       |
| Northwest       | 6.6        | -12.5       | 9.2        | 6.5        | 6.3        | -3.8        | -0.4       | -3.5       | 3.8         |
| South of Market | 3.2        | -15.1       | -1.5       | -1.7       | 0.3        | 4.0         | 18.4       | -11.2      | 2.0         |
| Southwest       | -1.5       | -1.7        | 9.0        | -0.7       | 3.9        | -5.2        | 0.8        | -0.9       | -7.3        |
| Van Ness        | 5.7        | -4.4        | -4.4       | 10.0       | -1.3       | -6.4        | 12.4       | 27.3       | -21.4       |
| Unclassified    | -72.1      | 54.0        | -49.4      | -50.8      | 45.8       | -16.4       | -40.2      | 77.1       | -32.3       |
| <b>TOTAL</b>    | <b>3.8</b> | <b>-7.5</b> | <b>3.5</b> | <b>2.2</b> | <b>2.1</b> | <b>-1.0</b> | <b>2.3</b> | <b>1.7</b> | <b>-7.3</b> |

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, 1999-2008**

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    | 1999             | 2000             | 2001             | 2002             | 2003             | 2004             | 2005             | 2006             | 2007             | 2008             |
|-----------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Bayview         | \$12,011         | \$27,301         | \$12,591         | \$13,980         | \$15,632         | \$8,229          | \$11,028         | \$13,149         | \$30,918         | \$7,321          |
| Civic Center    | \$32,980         | \$63,235         | \$49,009         | \$25,538         | \$38,673         | \$37,850         | \$20,561         | \$34,178         | \$45,171         | \$27,064         |
| Financial       | \$230,939        | \$331,635        | \$163,343        | \$162,336        | \$167,946        | \$142,264        | \$183,126        | \$150,994        | \$164,015        | \$187,217        |
| Mission         | \$23,550         | \$52,392         | \$31,229         | \$26,920         | \$35,088         | \$20,537         | \$24,845         | \$19,813         | \$32,950         | \$25,916         |
| North Beach     | \$16,322         | \$22,116         | \$16,531         | \$18,593         | \$20,206         | \$20,329         | \$14,581         | \$22,484         | \$14,920         | \$14,667         |
| North Central   | \$51,157         | \$62,977         | \$58,463         | \$55,893         | \$53,492         | \$27,507         | \$57,844         | \$75,214         | \$78,197         | \$52,711         |
| Northwest       | \$30,384         | \$39,555         | \$31,668         | \$36,688         | \$31,010         | \$37,720         | \$34,349         | \$39,336         | \$32,785         | \$34,007         |
| South of Market | \$283,454        | \$121,360        | \$76,097         | \$65,617         | \$69,516         | \$69,449         | \$70,364         | \$102,406        | \$182,266        | \$64,476         |
| Southwest       | \$117,249        | \$93,473         | \$94,626         | \$109,024        | \$108,678        | \$174,384        | \$122,371        | \$108,289        | \$114,082        | \$93,133         |
| Van Ness        | \$26,637         | \$31,914         | \$29,325         | \$24,495         | \$19,396         | \$24,278         | \$19,934         | \$33,590         | \$37,697         | \$25,299         |
| Unclassified    | \$13,822         | \$5,407          | \$2,097          | \$2,137          | \$5,345          | \$2,499          | \$620            | \$1,933          | \$1,009          | \$704            |
| <b>TOTAL</b>    | <b>\$838,506</b> | <b>\$851,364</b> | <b>\$564,979</b> | <b>\$541,222</b> | <b>\$564,981</b> | <b>\$565,046</b> | <b>\$559,622</b> | <b>\$601,385</b> | <b>\$734,009</b> | <b>\$532,515</b> |

## Annual Percentage Distribution

| C&I District    | 1999         | 2000         | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         | 2007         | 2008         |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 1.4          | 3.2          | 2.2          | 2.6          | 2.8          | 1.5          | 2.0          | 2.2          | 4.2          | 1.4          |
| Civic Center    | 3.9          | 7.4          | 8.7          | 4.7          | 6.8          | 6.7          | 3.7          | 5.7          | 6.2          | 5.1          |
| Financial       | 27.5         | 39.0         | 28.9         | 30.0         | 29.7         | 25.2         | 32.7         | 25.1         | 22.3         | 35.2         |
| Mission         | 2.8          | 6.2          | 5.5          | 5.0          | 6.2          | 3.6          | 4.4          | 3.3          | 4.5          | 4.9          |
| North Beach     | 1.9          | 2.6          | 2.9          | 3.4          | 3.6          | 3.6          | 2.6          | 3.7          | 2.0          | 2.8          |
| North Central   | 6.1          | 7.4          | 10.3         | 10.3         | 9.5          | 4.9          | 10.3         | 12.5         | 10.7         | 9.9          |
| Northwest       | 3.6          | 4.6          | 5.6          | 6.8          | 5.5          | 6.7          | 6.1          | 6.5          | 4.5          | 6.4          |
| South of Market | 33.8         | 14.3         | 13.5         | 12.1         | 12.3         | 12.3         | 12.6         | 17.0         | 24.8         | 12.1         |
| Southwest       | 14.0         | 11.0         | 16.7         | 20.1         | 19.2         | 30.9         | 21.9         | 18.0         | 15.5         | 17.5         |
| Van Ness        | 3.2          | 3.7          | 5.2          | 4.5          | 3.4          | 4.3          | 3.6          | 5.6          | 5.1          | 4.8          |
| Unclassified    | 1.6          | 0.6          | 0.4          | 0.4          | 0.9          | 0.4          | 0.1          | 0.3          | 0.1          | 0.1          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Change

| C&I District    | 1999-00    | 2000-01      | 2001-02     | 2002-03    | 2003-04    | 2004-05     | 2005-06    | 2006-07     | 2007-08      |
|-----------------|------------|--------------|-------------|------------|------------|-------------|------------|-------------|--------------|
| Bayview         | 127.3      | -53.9        | 11.0        | 11.8       | -47.4      | 34.0        | 19.2       | 135.1       | -76.3        |
| Civic Center    | 91.7       | -22.5        | -47.9       | 51.4       | -2.1       | -45.7       | 66.2       | 32.2        | -40.1        |
| Financial       | 43.6       | -50.7        | -0.6        | 3.5        | -15.3      | 28.7        | -17.5      | 8.6         | 14.1         |
| Mission         | 122.5      | -40.4        | -13.8       | 30.3       | -41.5      | 21.0        | -20.3      | 66.3        | -21.3        |
| North Beach     | 35.5       | -25.3        | 12.5        | 8.7        | 0.6        | -28.3       | 54.2       | -33.6       | -1.7         |
| North Central   | 23.1       | -7.2         | -4.4        | -4.3       | -48.6      | 110.3       | 30.0       | 4.0         | -32.6        |
| Northwest       | 30.2       | -19.9        | 15.9        | -15.5      | 21.6       | -8.9        | 14.5       | -16.7       | 3.7          |
| South of Market | -57.2      | -37.3        | -13.8       | 5.9        | -0.1       | 1.3         | 45.5       | 78.0        | -64.6        |
| Southwest       | -20.3      | 1.2          | 15.2        | -0.3       | 60.5       | -29.8       | -11.5      | 5.3         | -18.4        |
| Van Ness        | 19.8       | -8.1         | -16.5       | -20.8      | 25.2       | -17.9       | 68.5       | 12.2        | -32.9        |
| Unclassified    | -60.9      | -61.2        | 1.9         | 150.1      | -53.2      | -75.2       | 211.8      | -47.8       | -30.2        |
| <b>TOTAL</b>    | <b>1.5</b> | <b>-33.6</b> | <b>-4.2</b> | <b>4.4</b> | <b>0.0</b> | <b>-1.0</b> | <b>7.5</b> | <b>22.1</b> | <b>-27.5</b> |

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, 1999-2008**

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            | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          |
|-------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Bayview                 | \$19.9        | \$38.0        | \$13.2        | \$17.7        | \$20.9        | \$13.3        | \$16.8        | \$20.1        | \$44.7        | \$12.1        |
| Civic Center            | \$45.4        | \$68.8        | \$59.8        | \$36.4        | \$47.5        | \$46.2        | \$26.9        | \$46.4        | \$47.2        | \$32.2        |
| Financial               | \$73.4        | \$82.6        | \$51.1        | \$64.3        | \$58.2        | \$43.5        | \$50.5        | \$44.2        | \$45.2        | \$57.8        |
| Mission                 | \$13.6        | \$27.2        | \$17.2        | \$12.9        | \$17.0        | \$10.3        | \$12.7        | \$9.8         | \$17.1        | \$13.3        |
| North Beach             | \$22.6        | \$29.8        | \$24.0        | \$22.1        | \$26.1        | \$26.9        | \$17.6        | \$27.3        | \$18.9        | \$18.1        |
| North Central           | \$16.0        | \$19.2        | \$20.5        | \$15.8        | \$14.4        | \$7.8         | \$16.5        | \$19.9        | \$19.7        | \$15.4        |
| Northwest               | \$13.7        | \$16.8        | \$15.3        | \$16.3        | \$12.9        | \$14.8        | \$14.0        | \$16.1        | \$13.9        | \$13.9        |
| South of Market         | \$125.5       | \$52.0        | \$38.4        | \$33.6        | \$36.3        | \$36.1        | \$35.2        | \$43.3        | \$86.7        | \$30.1        |
| Southwest               | \$13.1        | \$10.6        | \$10.9        | \$11.6        | \$11.6        | \$17.9        | \$13.3        | \$11.7        | \$12.4        | \$10.9        |
| Van Ness                | \$25.5        | \$28.9        | \$27.8        | \$24.3        | \$17.5        | \$22.2        | \$19.4        | \$29.2        | \$25.7        | \$21.9        |
| Unclassified            | \$15.4        | \$21.6        | \$5.4         | \$11.0        | \$55.7        | \$17.9        | \$5.3         | \$27.6        | \$8.1         | \$8.4         |
| <b>Citywide Average</b> | <b>\$32.9</b> | <b>\$32.2</b> | <b>\$23.1</b> | <b>\$21.4</b> | <b>\$21.8</b> | <b>\$21.4</b> | <b>\$21.4</b> | <b>\$22.5</b> | <b>\$27.0</b> | <b>\$21.1</b> |

## Percentage Change

| C&I District            | 1999-00     | 2000-01      | 2001-02     | 2001-02    | 2003-04     | 2004-05     | 2005-06    | 2006-07     | 2007-08      |
|-------------------------|-------------|--------------|-------------|------------|-------------|-------------|------------|-------------|--------------|
| Bayview                 | 91.3        | -65.3        | 34.7        | 17.8       | -36.2       | 26.0        | 19.4       | 122.9       | -72.9        |
| Civic Center            | 51.5        | -13.0        | -39.1       | 30.4       | -2.7        | -41.8       | 72.6       | 1.7         | -31.9        |
| Financial               | 12.6        | -38.2        | 25.8        | -9.4       | -25.2       | 15.9        | -12.5      | 2.3         | 28.0         |
| Mission                 | 101.0       | -37.0        | -24.8       | 31.9       | -39.7       | 24.0        | -23.1      | 74.6        | -22.2        |
| North Beach             | 31.5        | -19.3        | -8.0        | 18.1       | 2.9         | -34.5       | 55.3       | -30.8       | -4.2         |
| North Central           | 20.1        | 6.9          | -22.9       | -8.6       | -45.8       | 110.6       | 20.7       | -0.9        | -22.0        |
| Northwest               | 22.1        | -8.5         | 6.1         | -20.6      | 14.5        | -5.3        | 15.0       | -13.6       | -0.1         |
| South of Market         | -58.5       | -26.2        | -12.4       | 7.8        | -0.4        | -2.6        | 23.0       | 100.4       | -65.3        |
| Southwest               | -19.1       | 2.9          | 5.7         | 0.4        | 54.5        | -26.0       | -12.2      | 6.3         | -11.9        |
| Van Ness                | 13.4        | -3.8         | -12.7       | -28.0      | 26.8        | -12.3       | 49.9       | -11.9       | -14.6        |
| Unclassified            | 40.4        | -74.8        | 101.2       | 408.1      | -67.9       | -70.3       | 421.1      | -70.5       | 3.0          |
| <b>Citywide Average</b> | <b>-2.2</b> | <b>-28.3</b> | <b>-7.4</b> | <b>2.1</b> | <b>-2.0</b> | <b>-0.0</b> | <b>5.0</b> | <b>20.0</b> | <b>-21.7</b> |

## Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.3.A PERMIT APPLICATIONS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2008**

This table presents the permit applications for 2008 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.

## Number of Permits

| C&I District    | Office       | Retail       | PDR        | Hotel      | CIE        | Residential   | Other      | TOTAL         |
|-----------------|--------------|--------------|------------|------------|------------|---------------|------------|---------------|
| Bayview         | 33           | 46           | 53         | 0          | 24         | 430           | 49         | 635           |
| Civic Center    | 175          | 118          | 2          | 94         | 62         | 390           | 56         | 897           |
| Financial       | 2,428        | 349          | 7          | 75         | 46         | 323           | 141        | 3,369         |
| Mission         | 75           | 154          | 21         | 17         | 24         | 1,647         | 46         | 1,984         |
| North Beach     | 91           | 90           | 5          | 11         | 19         | 590           | 32         | 838           |
| North Central   | 68           | 205          | 7          | 18         | 129        | 2,985         | 87         | 3,499         |
| Northwest       | 43           | 102          | 7          | 1          | 51         | 2,227         | 54         | 2,485         |
| South of Market | 675          | 389          | 99         | 59         | 56         | 863           | 113        | 2,254         |
| Southwest       | 130          | 340          | 28         | 5          | 150        | 7,853         | 164        | 8,670         |
| Van Ness        | 69           | 132          | 4          | 30         | 35         | 875           | 47         | 1,192         |
| Unclassified    | 4            | 2            | 2          | 0          | 6          | 43            | 30         | 87            |
| <b>TOTAL</b>    | <b>3,791</b> | <b>1,927</b> | <b>235</b> | <b>310</b> | <b>602</b> | <b>18,226</b> | <b>819</b> | <b>25,910</b> |

## Percentage Distribution by C&amp;I District

| C&I District    | Office       | Retail       | PDR          | Hotel        | CIE          | Residential  | Other        | TOTAL        |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 0.9          | 2.4          | 22.6         | 0.0          | 4.0          | 2.4          | 6.0          | 2.5          |
| Civic Center    | 4.6          | 6.1          | 0.9          | 30.3         | 10.3         | 2.1          | 6.8          | 3.5          |
| Financial       | 64.0         | 18.1         | 3.0          | 24.2         | 7.6          | 1.8          | 17.2         | 13.0         |
| Mission         | 2.0          | 8.0          | 8.9          | 5.5          | 4.0          | 9.0          | 5.6          | 7.7          |
| North Beach     | 2.4          | 4.7          | 2.1          | 3.5          | 3.2          | 3.2          | 3.9          | 3.2          |
| North Central   | 1.8          | 10.6         | 3.0          | 5.8          | 21.4         | 16.4         | 10.6         | 13.5         |
| Northwest       | 1.1          | 5.3          | 3.0          | 0.3          | 8.5          | 12.2         | 6.6          | 9.6          |
| South of Market | 17.8         | 20.2         | 42.1         | 19.0         | 9.3          | 4.7          | 13.8         | 8.7          |
| Southwest       | 3.4          | 17.6         | 11.9         | 1.6          | 24.9         | 43.1         | 20.0         | 33.5         |
| Van Ness        | 1.8          | 6.9          | 1.7          | 9.7          | 5.8          | 4.8          | 5.7          | 4.6          |
| Unclassified    | 0.1          | 0.1          | 0.9          | 0.0          | 1.0          | 0.2          | 3.7          | 0.3          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Distribution by Land Use Category

| C&I District    | Office      | Retail     | PDR        | Hotel      | CIE        | Residential | Other      | TOTAL        |
|-----------------|-------------|------------|------------|------------|------------|-------------|------------|--------------|
| Bayview         | 5.2         | 7.2        | 8.3        | 0.0        | 3.8        | 67.7        | 7.7        | 100.0        |
| Civic Center    | 19.5        | 13.2       | 0.2        | 10.5       | 6.9        | 43.5        | 6.2        | 100.0        |
| Financial       | 72.1        | 10.4       | 0.2        | 2.2        | 1.4        | 9.6         | 4.2        | 100.0        |
| Mission         | 3.8         | 7.8        | 1.1        | 0.9        | 1.2        | 83.0        | 2.3        | 100.0        |
| North Beach     | 10.9        | 10.7       | 0.6        | 1.3        | 2.3        | 70.4        | 3.8        | 100.0        |
| North Central   | 1.9         | 5.9        | 0.2        | 0.5        | 3.7        | 85.3        | 2.5        | 100.0        |
| Northwest       | 1.7         | 4.1        | 0.3        | 0.0        | 2.1        | 89.6        | 2.2        | 100.0        |
| South of Market | 29.9        | 17.3       | 4.4        | 2.6        | 2.5        | 38.3        | 5.0        | 100.0        |
| Southwest       | 1.5         | 3.9        | 0.3        | 0.1        | 1.7        | 90.6        | 1.9        | 100.0        |
| Van Ness        | 5.8         | 11.1       | 0.3        | 2.5        | 2.9        | 73.4        | 3.9        | 100.0        |
| Unclassified    | 4.6         | 2.3        | 2.3        | 0.0        | 6.9        | 49.4        | 34.5       | 100.0        |
| <b>TOTAL</b>    | <b>14.6</b> | <b>7.4</b> | <b>0.9</b> | <b>1.2</b> | <b>2.3</b> | <b>70.3</b> | <b>3.2</b> | <b>100.0</b> |

Notes: PDR = Production/Distribution/Repair; 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, 2008**

This table presents the total construction cost for all permit applications for 2008 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 (2008 \$ 000s)

| C&I District    | Office           | Retail           | PDR             | Hotel           | CIE              | Residential      | Other           | TOTAL              |
|-----------------|------------------|------------------|-----------------|-----------------|------------------|------------------|-----------------|--------------------|
| Bayview         | \$3,142          | \$1,266          | \$3,494         | \$0             | \$3,056          | \$9,617          | \$303           | \$20,878           |
| Civic Center    | \$12,634         | \$8,981          | \$13            | \$9,879         | \$4,992          | \$33,834         | \$322           | \$70,655           |
| Financial       | \$246,541        | \$31,896         | \$82            | \$19,085        | \$17,247         | \$105,037        | \$4,336         | \$424,224          |
| Mission         | \$12,963         | \$4,479          | \$745           | \$71            | \$5,008          | \$37,412         | \$205           | \$60,883           |
| North Beach     | \$5,633          | \$3,754          | \$303           | \$4,987         | \$672            | \$21,056         | \$180           | \$36,585           |
| North Central   | \$11,593         | \$5,892          | \$4,134         | \$381           | \$18,577         | \$150,139        | \$1,351         | \$192,067          |
| Northwest       | \$2,184          | \$3,506          | \$263           | \$0             | \$6,117          | \$79,030         | \$230           | \$91,330           |
| South of Market | \$205,758        | \$78,830         | \$16,732        | \$3,630         | \$8,266          | \$56,232         | \$2,151         | \$371,599          |
| Southwest       | \$8,534          | \$14,556         | \$416           | \$93            | \$33,217         | \$210,306        | \$2,282         | \$269,404          |
| Van Ness        | \$2,379          | \$7,208          | \$69            | \$344           | \$17,107         | \$33,193         | \$194           | \$60,794           |
| Unclassified    | \$155            | \$210            | \$11            | \$0             | \$791            | \$1,941          | \$0             | \$3,108            |
| <b>TOTAL</b>    | <b>\$511,516</b> | <b>\$160,578</b> | <b>\$26,262</b> | <b>\$38,770</b> | <b>\$115,050</b> | <b>\$737,797</b> | <b>\$11,554</b> | <b>\$1,601,527</b> |

Annual Percentage Distribution by C&I District

| C&I District    | Office       | Retail       | PDR          | Hotel        | CIE          | Residential  | Other        | TOTAL        |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 0.6          | 0.8          | 13.3         | 0.0          | 2.7          | 1.3          | 2.6          | 1.3          |
| Civic Center    | 2.5          | 5.6          | 0.0          | 25.5         | 4.3          | 4.6          | 2.8          | 4.4          |
| Financial       | 48.2         | 19.9         | 0.3          | 49.2         | 15.0         | 14.2         | 37.5         | 26.5         |
| Mission         | 2.5          | 2.8          | 2.8          | 0.2          | 4.4          | 5.1          | 1.8          | 3.8          |
| North Beach     | 1.1          | 2.3          | 1.2          | 12.9         | 0.6          | 2.9          | 1.6          | 2.3          |
| North Central   | 2.3          | 3.7          | 15.7         | 1.0          | 16.1         | 20.3         | 11.7         | 12.0         |
| Northwest       | 0.4          | 2.2          | 1.0          | 0.0          | 5.3          | 10.7         | 2.0          | 5.7          |
| South of Market | 40.2         | 49.1         | 63.7         | 9.4          | 7.2          | 7.6          | 18.6         | 23.2         |
| Southwest       | 1.7          | 9.1          | 1.6          | 0.2          | 28.9         | 28.5         | 19.8         | 16.8         |
| Van Ness        | 0.5          | 4.5          | 0.3          | 1.7          | 14.9         | 4.5          | 1.7          | 3.8          |
| Unclassified    | 0.0          | 0.1          | 0.0          | 0.0          | 0.7          | 0.3          | 0.0          | 0.2          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

Annual Percentage Distribution by Land Use Category

| C&I District    | Office      | Retail      | PDR        | Hotel      | CIE        | Residential | Other      | TOTAL        |
|-----------------|-------------|-------------|------------|------------|------------|-------------|------------|--------------|
| Bayview         | 15.0        | 6.1         | 16.7       | 0.0        | 14.6       | 46.1        | 1.5        | 100.0        |
| Civic Center    | 17.9        | 12.7        | 0.0        | 14.0       | 7.1        | 47.9        | 0.5        | 100.0        |
| Financial       | 58.1        | 7.5         | 0.0        | 4.5        | 4.1        | 24.8        | 1.0        | 100.0        |
| Mission         | 21.3        | 7.4         | 1.2        | 0.1        | 8.2        | 61.4        | 0.3        | 100.0        |
| North Beach     | 15.4        | 10.3        | 0.8        | 13.6       | 1.8        | 57.6        | 0.5        | 100.0        |
| North Central   | 6.0         | 3.1         | 2.2        | 0.2        | 9.7        | 78.2        | 0.7        | 100.0        |
| Northwest       | 2.4         | 3.8         | 0.3        | 0.0        | 6.7        | 86.5        | 0.3        | 100.0        |
| South of Market | 55.4        | 21.2        | 4.5        | 1.0        | 2.2        | 15.1        | 0.6        | 100.0        |
| Southwest       | 3.2         | 5.4         | 0.2        | 0.0        | 12.3       | 78.1        | 0.8        | 100.0        |
| Van Ness        | 3.9         | 11.9        | 0.1        | 1.1        | 28.1       | 54.6        | 0.3        | 100.0        |
| Unclassified    | 5.0         | 6.8         | 0.4        | 0.0        | 25.5       | 62.5        | 0.0        | 100.0        |
| <b>TOTAL</b>    | <b>31.9</b> | <b>10.0</b> | <b>1.6</b> | <b>2.4</b> | <b>7.2</b> | <b>46.1</b> | <b>0.7</b> | <b>100.0</b> |

Notes: PDR = Production/Distribution/Repair; 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, 2008**

This table presents the average construction cost for all permit applications for 2008 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 (2008 \$ 000s)

| C&I District            | Office         | Retail        | PDR            | Hotel          | CIE            | Residential   | Other         | Average        |
|-------------------------|----------------|---------------|----------------|----------------|----------------|---------------|---------------|----------------|
| Bayview                 | \$95.2         | \$27.5        | \$65.9         | \$0.0          | \$127.3        | \$22.4        | \$6.2         | \$57.4         |
| Civic Center            | \$72.2         | \$76.1        | \$6.5          | \$105.1        | \$80.5         | \$86.8        | \$5.8         | \$61.8         |
| Financial               | \$101.5        | \$91.4        | \$11.7         | \$254.5        | \$374.9        | \$325.2       | \$30.8        | \$170.0        |
| Mission                 | \$172.8        | \$29.1        | \$35.5         | \$4.2          | \$208.7        | \$22.7        | \$4.5         | \$68.2         |
| North Beach             | \$61.9         | \$41.7        | \$60.6         | \$453.4        | \$35.4         | \$35.7        | \$5.6         | \$99.2         |
| North Central           | \$170.5        | \$28.7        | \$590.6        | \$21.2         | \$144.0        | \$50.3        | \$15.5        | \$145.8        |
| Northwest               | \$50.8         | \$34.4        | \$37.6         | \$0.0          | \$119.9        | \$35.5        | \$4.3         | \$40.3         |
| South of Market         | \$304.8        | \$202.6       | \$169.0        | \$61.5         | \$147.6        | \$65.2        | \$19.0        | \$138.5        |
| Southwest               | \$65.6         | \$42.8        | \$14.9         | \$18.6         | \$221.4        | \$26.8        | \$13.9        | \$57.7         |
| Van Ness                | \$34.5         | \$54.6        | \$17.3         | \$21.5         | \$488.8        | \$37.9        | \$4.1         | \$94.1         |
| Unclassified            | \$38.8         | \$105.0       | \$5.5          | \$0.0          | \$131.8        | \$45.1        | \$0.0         | \$54.4         |
| <b>Citywide Average</b> | <b>\$134.9</b> | <b>\$83.8</b> | <b>\$111.8</b> | <b>\$125.1</b> | <b>\$191.1</b> | <b>\$40.5</b> | <b>\$14.1</b> | <b>\$100.1</b> |

**Notes:**

- PDR = Production/Distribution/Repair
- 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, 2008**

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            | 12         | 2         | 2,517         | 1,098        | 162          | <b>3,791</b>  |
| Retail            | 17         | 2         | 922           | 832          | 154          | <b>1,927</b>  |
| PDR               | 3          | 0         | 94            | 119          | 19           | <b>235</b>    |
| Hotel             | 2          | 0         | 121           | 171          | 16           | <b>310</b>    |
| CIE               | 8          | 1         | 279           | 263          | 51           | <b>602</b>    |
| Residential       | 69         | 6         | 10,331        | 6,851        | 969          | <b>18,226</b> |
| Other             | 5          | 2         | 220           | 368          | 224          | <b>819</b>    |
| <b>TOTAL</b>      | <b>116</b> | <b>13</b> | <b>14,484</b> | <b>9,702</b> | <b>1,595</b> | <b>25,910</b> |

Percentage Distribution by Land Use Category

| Land Use Category | Approved     | Cancelled    | Completed    | Issued       | Other        | TOTAL        |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 10.3         | 15.4         | 17.4         | 11.3         | 10.2         | <b>14.6</b>  |
| Retail            | 14.7         | 15.4         | 6.4          | 8.6          | 9.7          | <b>7.4</b>   |
| PDR               | 2.6          | 0.0          | 0.6          | 1.2          | 1.2          | <b>0.9</b>   |
| Hotel             | 1.7          | 0.0          | 0.8          | 1.8          | 1.0          | <b>1.2</b>   |
| CIE               | 6.9          | 7.7          | 1.9          | 2.7          | 3.2          | <b>2.3</b>   |
| Residential       | 59.5         | 46.2         | 71.3         | 70.6         | 60.8         | <b>70.3</b>  |
| Other             | 4.3          | 15.4         | 1.5          | 3.8          | 14.0         | <b>3.2</b>   |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

Percentage Distribution by Permit Status

| Land Use Category | Approved   | Cancelled  | Completed   | Issued      | Other      | TOTAL        |
|-------------------|------------|------------|-------------|-------------|------------|--------------|
| Office            | 0.3        | 0.1        | 66.4        | 29.0        | 4.3        | <b>100.0</b> |
| Retail            | 0.9        | 0.1        | 47.8        | 43.2        | 8.0        | <b>100.0</b> |
| PDR               | 1.3        | 0.0        | 40.0        | 50.6        | 8.1        | <b>100.0</b> |
| Hotel             | 0.6        | 0.0        | 39.0        | 55.2        | 5.2        | <b>100.0</b> |
| CIE               | 1.3        | 0.2        | 46.3        | 43.7        | 8.5        | <b>100.0</b> |
| Residential       | 0.4        | 0.0        | 56.7        | 37.6        | 5.3        | <b>100.0</b> |
| Other             | 0.6        | 0.2        | 26.9        | 44.9        | 27.4       | <b>100.0</b> |
| <b>TOTAL</b>      | <b>0.4</b> | <b>0.1</b> | <b>55.9</b> | <b>37.4</b> | <b>6.2</b> | <b>100.0</b> |

Notes:

- PDR = Production/Distribution/Repair
- 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, 2008**

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 (2008 \$ 000s)

| Land Use Category | Approved        | Cancelled    | Completed        | Issued           | Other            | TOTAL              |
|-------------------|-----------------|--------------|------------------|------------------|------------------|--------------------|
| Office            | \$1,600         | \$65         | \$216,393        | \$123,109        | \$170,349        | <b>\$511,516</b>   |
| Retail            | \$7,043         | \$125        | \$52,576         | \$88,035         | \$12,798         | <b>\$160,577</b>   |
| PDR               | \$450           | \$0          | \$3,391          | \$18,783         | \$3,637          | <b>\$26,261</b>    |
| Hotel             | \$18            | \$0          | \$10,974         | \$26,434         | \$1,345          | <b>\$38,771</b>    |
| CIE               | \$6,453         | \$60         | \$20,351         | \$53,615         | \$34,572         | <b>\$115,051</b>   |
| Residential       | \$13,449        | \$135        | \$168,106        | \$269,329        | \$286,781        | <b>\$737,800</b>   |
| Other             | \$1,027         | \$3          | \$2,980          | \$7,025          | \$520            | <b>\$11,555</b>    |
| <b>TOTAL</b>      | <b>\$30,040</b> | <b>\$388</b> | <b>\$474,771</b> | <b>\$586,330</b> | <b>\$510,002</b> | <b>\$1,601,531</b> |

## Percentage Distribution by Land Use Category

| Land Use Category | Approved     | Cancelled    | Completed    | Issued       | Other        | TOTAL        |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Office            | 5.3          | 16.8         | 45.6         | 21.0         | 33.4         | <b>31.9</b>  |
| Retail            | 23.4         | 32.2         | 11.1         | 15.0         | 2.5          | <b>10.0</b>  |
| PDR               | 1.5          | 0.0          | 0.7          | 3.2          | 0.7          | <b>1.6</b>   |
| Hotel             | 0.1          | 0.0          | 2.3          | 4.5          | 0.3          | <b>2.4</b>   |
| CIE               | 21.5         | 15.5         | 4.3          | 9.1          | 6.8          | <b>7.2</b>   |
| Residential       | 44.8         | 34.8         | 35.4         | 45.9         | 56.2         | <b>46.1</b>  |
| Other             | 3.4          | 0.8          | 0.6          | 1.2          | 0.1          | <b>0.7</b>   |
| <b>TOTAL</b>      | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Distribution by Permit Status

| Land Use Category | Approved   | Cancelled  | Completed   | Issued      | Other       | TOTAL        |
|-------------------|------------|------------|-------------|-------------|-------------|--------------|
| Office            | 0.3        | 0.0        | 42.3        | 24.1        | 33.3        | <b>100.0</b> |
| Retail            | 4.4        | 0.1        | 32.7        | 54.8        | 8.0         | <b>100.0</b> |
| PDR               | 1.7        | 0.0        | 12.9        | 71.5        | 13.8        | <b>100.0</b> |
| Hotel             | 0.0        | 0.0        | 28.3        | 68.2        | 3.5         | <b>100.0</b> |
| CIE               | 5.6        | 0.1        | 17.7        | 46.6        | 30.0        | <b>100.0</b> |
| Residential       | 1.8        | 0.0        | 22.8        | 36.5        | 38.9        | <b>100.0</b> |
| Other             | 8.9        | 0.0        | 25.8        | 60.8        | 4.5         | <b>100.0</b> |
| <b>TOTAL</b>      | <b>1.9</b> | <b>0.0</b> | <b>29.6</b> | <b>36.6</b> | <b>31.8</b> | <b>100.0</b> |

## Notes:

- PDR = Production/Distribution/Repair
- 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, 2008**

This table presents the average construction cost for all permit applications for 2008 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 (2008 \$ 000s)

| Land Use Category | Approved       | Cancelled     | Completed     | Issued        | Other          | TOTAL         |
|-------------------|----------------|---------------|---------------|---------------|----------------|---------------|
| Office            | \$133.3        | \$32.5        | \$86.0        | \$112.1       | \$1,051.5      | \$134.9       |
| Retail            | \$414.3        | \$62.5        | \$57.0        | \$105.8       | \$83.1         | \$83.3        |
| PDR               | \$150.0        | -             | \$36.1        | \$157.8       | \$191.4        | \$111.7       |
| Hotel             | \$9.0          | -             | \$90.7        | \$154.6       | \$84.1         | \$125.1       |
| CIE               | \$806.6        | \$60.0        | \$72.9        | \$203.9       | \$677.9        | \$191.1       |
| Residential       | \$194.9        | \$22.5        | \$16.3        | \$39.3        | \$296.0        | \$40.5        |
| Other             | \$204.5        | \$1.5         | \$13.5        | \$19.1        | \$2.3          | \$14.1        |
| <b>TOTAL</b>      | <b>\$259.0</b> | <b>\$29.8</b> | <b>\$32.8</b> | <b>\$60.4</b> | <b>\$319.8</b> | <b>\$61.8</b> |

**Notes:**

- PDR = Production/Distribution/Repair
- 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, 2008**

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         | 2          | 0         | 306           | 279          | 48           | <b>635</b>    |
| Civic Center    | 7          | 1         | 483           | 357          | 49           | <b>897</b>    |
| Financial       | 6          | 3         | 2,144         | 1,069        | 147          | <b>3,369</b>  |
| Mission         | 10         | 0         | 1,087         | 755          | 132          | <b>1,984</b>  |
| North Beach     | 6          | 3         | 456           | 307          | 66           | <b>838</b>    |
| North Central   | 14         | 1         | 1,881         | 1,403        | 200          | <b>3,499</b>  |
| Northwest       | 8          | 2         | 1,415         | 900          | 160          | <b>2,485</b>  |
| South of Market | 15         | 1         | 1,078         | 969          | 191          | <b>2,254</b>  |
| Southwest       | 42         | 2         | 4,969         | 3,200        | 457          | <b>8,670</b>  |
| Van Ness        | 6          | 0         | 650           | 452          | 84           | <b>1,192</b>  |
| Unclassified    | 0          | 0         | 15            | 11           | 61           | <b>87</b>     |
| <b>TOTAL</b>    | <b>116</b> | <b>13</b> | <b>14,484</b> | <b>9,702</b> | <b>1,595</b> | <b>25,910</b> |

## Percentage Distribution by C&amp;I District

| C&I District    | Approved     | Canceled     | Completed    | Issued       | Other        | TOTAL        |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 0.0          | 2.1          | 2.9          | 3.0          | 2.5          | <b>2.6</b>   |
| Civic Center    | 6.0          | 7.7          | 3.3          | 3.7          | 3.1          | <b>3.5</b>   |
| Financial       | 5.2          | 23.1         | 14.8         | 11.0         | 9.2          | <b>13.0</b>  |
| Mission         | 8.6          | 0.0          | 7.5          | 7.8          | 8.3          | <b>7.7</b>   |
| North Beach     | 5.2          | 23.1         | 3.1          | 3.2          | 4.1          | <b>3.2</b>   |
| North Central   | 12.1         | 7.7          | 13.0         | 14.5         | 12.5         | <b>13.5</b>  |
| Northwest       | 6.9          | 15.4         | 9.8          | 9.3          | 10.0         | <b>9.6</b>   |
| South of Market | 12.9         | 7.7          | 7.4          | 10.0         | 12.0         | <b>8.7</b>   |
| Southwest       | 36.2         | 15.4         | 34.3         | 33.0         | 28.7         | <b>33.5</b>  |
| Van Ness        | 5.2          | 0.0          | 4.5          | 4.7          | 5.3          | <b>4.6</b>   |
| Unclassified    | 0.0          | 0.0          | 0.1          | 0.1          | 3.8          | <b>0.3</b>   |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

## Percentage Distribution by Permit Status

| C&I District    | Approved   | Canceled   | Completed   | Issued      | Other      | TOTAL        |
|-----------------|------------|------------|-------------|-------------|------------|--------------|
| Bayview         | 0.3        | 0.0        | 48.2        | 43.9        | 7.6        | <b>100.0</b> |
| Civic Center    | 0.8        | 0.1        | 53.8        | 39.8        | 5.5        | <b>100.0</b> |
| Financial       | 0.2        | 0.1        | 63.6        | 31.7        | 4.4        | <b>100.0</b> |
| Mission         | 0.5        | 0.0        | 54.8        | 38.1        | 6.7        | <b>100.0</b> |
| North Beach     | 0.7        | 0.4        | 54.4        | 36.6        | 7.9        | <b>100.0</b> |
| North Central   | 0.4        | 0.0        | 53.8        | 40.1        | 5.7        | <b>100.0</b> |
| Northwest       | 0.3        | 0.1        | 56.9        | 36.2        | 6.4        | <b>100.0</b> |
| South of Market | 0.7        | 0.0        | 47.8        | 43.0        | 8.5        | <b>100.0</b> |
| Southwest       | 0.5        | 0.0        | 57.3        | 36.9        | 5.3        | <b>100.0</b> |
| Van Ness        | 0.5        | 0.0        | 54.5        | 37.9        | 7.0        | <b>100.0</b> |
| Unclassified    | 0.0        | 0.0        | 17.2        | 12.6        | 70.1       | <b>100.0</b> |
| <b>TOTAL</b>    | <b>0.4</b> | <b>0.1</b> | <b>55.9</b> | <b>37.4</b> | <b>6.2</b> | <b>100.0</b> |

## Note:

- 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, 2008**

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 (2008 \$ 000s)

| C&I District    | Approved        | Canceled     | Completed        | Issued           | Other            | TOTAL              |
|-----------------|-----------------|--------------|------------------|------------------|------------------|--------------------|
| Bayview         | \$520           | \$0          | \$5,762          | \$10,148         | \$4,448          | <b>\$120,878</b>   |
| Civic Center    | \$3,462         | \$2          | \$19,573         | \$31,590         | \$16,027         | <b>\$70,654</b>    |
| Financial       | \$806           | \$98         | \$186,707        | \$121,601        | \$115,013        | <b>\$424,225</b>   |
| Mission         | \$798           | \$0          | \$15,678         | \$33,660         | \$10,747         | <b>\$60,883</b>    |
| North Beach     | \$381           | \$133        | \$20,072         | \$9,260          | \$6,739          | <b>\$36,585</b>    |
| North Central   | \$3,712         | \$2          | \$36,570         | \$127,515        | \$24,269         | <b>\$192,068</b>   |
| Northwest       | \$1,207         | \$63         | \$27,903         | \$28,213         | \$33,943         | <b>\$91,329</b>    |
| South of Market | \$8,279         | \$0          | \$62,444         | \$120,798        | \$180,079        | <b>\$371,600</b>   |
| Southwest       | \$8,409         | \$90         | \$81,440         | \$86,205         | \$93,260         | <b>\$269,404</b>   |
| Van Ness        | \$2,465         | \$0          | \$18,090         | \$16,627         | \$23,612         | <b>\$60,794</b>    |
| Unclassified    | \$0             | \$0          | \$532            | \$712            | \$1,864          | <b>\$3,108</b>     |
| <b>TOTAL</b>    | <b>\$30,039</b> | <b>\$388</b> | <b>\$474,771</b> | <b>\$586,329</b> | <b>\$510,001</b> | <b>\$1,601,528</b> |

Percentage Distribution by C&I District

| C&I District    | Approved     | Canceled     | Completed    | Issued       | Other        | TOTAL        |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Bayview         | 1.7          | 0.0          | 1.2          | 1.7          | 0.9          | <b>1.3</b>   |
| Civic Center    | 11.5         | 0.5          | 4.1          | 5.4          | 3.1          | <b>4.4</b>   |
| Financial       | 2.7          | 25.3         | 39.3         | 20.7         | 22.6         | <b>26.5</b>  |
| Mission         | 2.7          | 0.0          | 3.3          | 5.7          | 2.1          | <b>3.8</b>   |
| North Beach     | 1.3          | 34.3         | 4.2          | 1.6          | 1.3          | <b>2.3</b>   |
| North Central   | 12.4         | 0.5          | 7.7          | 21.7         | 4.8          | <b>12.0</b>  |
| Northwest       | 4.0          | 16.2         | 5.9          | 4.8          | 6.7          | <b>5.7</b>   |
| South of Market | 27.6         | 0.0          | 13.2         | 20.6         | 35.3         | <b>23.2</b>  |
| Southwest       | 28.0         | 23.2         | 17.2         | 14.7         | 18.3         | <b>16.8</b>  |
| Van Ness        | 8.2          | 0.0          | 3.8          | 2.8          | 4.6          | <b>3.8</b>   |
| Unclassified    | 0.0          | 0.0          | 0.1          | 0.1          | 0.4          | <b>0.2</b>   |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

Percentage Distribution by Permit Status

| C&I District    | Approved   | Canceled   | Completed   | Issued      | Other       | TOTAL        |
|-----------------|------------|------------|-------------|-------------|-------------|--------------|
| Bayview         | 2.5        | 0.0        | 27.6        | 48.6        | 21.3        | <b>100.0</b> |
| Civic Center    | 4.9        | 0.0        | 27.7        | 44.7        | 22.7        | <b>100.0</b> |
| Financial       | 0.2        | 0.0        | 44.0        | 28.7        | 27.1        | <b>100.0</b> |
| Mission         | 1.3        | 0.0        | 25.8        | 55.3        | 17.7        | <b>100.0</b> |
| North Beach     | 1.0        | 0.4        | 54.9        | 25.3        | 18.4        | <b>100.0</b> |
| North Central   | 1.9        | 0.0        | 19.0        | 66.4        | 12.6        | <b>100.0</b> |
| Northwest       | 1.3        | 0.1        | 30.6        | 30.9        | 37.2        | <b>100.0</b> |
| South of Market | 2.2        | 0.0        | 16.8        | 32.5        | 48.5        | <b>100.0</b> |
| Southwest       | 3.1        | 0.0        | 30.2        | 32.0        | 34.6        | <b>100.0</b> |
| Van Ness        | 4.1        | 0.0        | 29.8        | 27.3        | 38.8        | <b>100.0</b> |
| Unclassified    | 0.0        | 0.0        | 17.1        | 22.9        | 60.0        | <b>100.0</b> |
| <b>TOTAL</b>    | <b>1.9</b> | <b>0.0</b> | <b>29.6</b> | <b>36.6</b> | <b>31.8</b> | <b>100.0</b> |

**Note:**  
 • 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, 2008**

This table presents the average construction cost for all permit applications for 2008 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 (2008 \$ 000s)

| C&I District    | Approved       | Canceled      | Completed     | Issued        | Other          | TOTAL          |
|-----------------|----------------|---------------|---------------|---------------|----------------|----------------|
| Bayview         | \$260.0        | -             | \$18.8        | \$36.4        | \$92.7         | <b>\$32.9</b>  |
| Civic Center    | \$494.6        | \$2.0         | \$40.5        | \$88.5        | \$327.1        | <b>\$78.8</b>  |
| Financial       | \$134.3        | \$32.7        | \$87.1        | \$113.8       | \$782.4        | <b>\$125.9</b> |
| Mission         | \$79.8         | -             | \$14.4        | \$44.6        | \$81.4         | <b>\$30.7</b>  |
| North Beach     | \$63.5         | \$44.3        | \$44.0        | \$30.2        | \$102.1        | <b>\$43.7</b>  |
| North Central   | \$265.1        | \$2.0         | \$19.4        | \$90.9        | \$121.3        | <b>\$54.9</b>  |
| Northwest       | \$150.9        | \$31.5        | \$19.7        | \$31.3        | \$212.1        | <b>\$36.8</b>  |
| South of Market | \$551.9        | -             | \$57.9        | \$124.7       | \$942.8        | <b>\$164.9</b> |
| Southwest       | \$200.2        | \$45.0        | \$16.4        | \$26.9        | \$204.1        | <b>\$31.1</b>  |
| Van Ness        | \$410.8        | -             | \$27.8        | \$36.8        | \$281.1        | <b>\$51.0</b>  |
| Unclassified    | -              | -             | \$35.5        | \$64.7        | \$30.6         | <b>\$35.7</b>  |
| <b>TOTAL</b>    | <b>\$259.0</b> | <b>\$29.8</b> | <b>\$32.8</b> | <b>\$60.4</b> | <b>\$319.7</b> | <b>\$61.8</b>  |

**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, 1999-2008**

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

Building Square Footage (000s)

| Location                      | 1999          | 2000          | 2001          | 2002          | 2003          | 2004          | 2005          | 2006          | 2007          | 2008          |
|-------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Central Business District     | 42,727        | 44,326        | 43,904        | 45,663        | 48,192        | 48,198        | 46,719        | 46,956        | 47,026        | 48,084        |
| Non-Central Business District | 21,171        | 21,941        | 22,137        | 24,968        | 22,622        | 22,686        | 22,845        | 22,932        | 22,996        | 24,300        |
| <b>TOTAL</b>                  | <b>63,899</b> | <b>66,267</b> | <b>66,041</b> | <b>70,631</b> | <b>70,814</b> | <b>70,884</b> | <b>69,564</b> | <b>69,888</b> | <b>70,022</b> | <b>72,384</b> |

Percentage Change

| Location                      | 1999-00    | 2000-01     | 2001-02    | 2002-03    | 2003-04    | 2004-05     | 2005-06    | 2006-07    | 2007-08    |
|-------------------------------|------------|-------------|------------|------------|------------|-------------|------------|------------|------------|
| Central Business District     | 3.7        | -1.0        | 4.0        | 5.5        | 0.0        | -3.1        | 0.5        | 0.1        | 2.3        |
| Non-Central Business District | 3.6        | 0.9         | 12.8       | -9.4       | 0.3        | 0.7         | 0.4        | 0.3        | 5.7        |
| <b>TOTAL</b>                  | <b>3.7</b> | <b>-0.3</b> | <b>7.0</b> | <b>0.3</b> | <b>0.1</b> | <b>-1.9</b> | <b>0.5</b> | <b>0.2</b> | <b>3.4</b> |

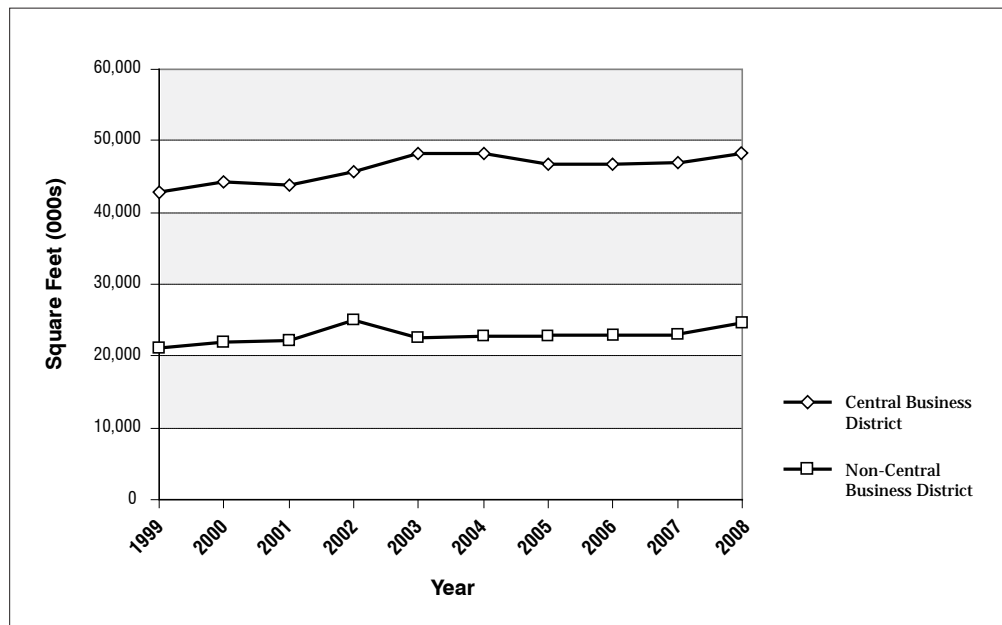
Note:

- 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, 1999-2008**





**TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2008**

This table conveys the area square footage for each land use category for the 21 plan areas in San Francisco. These plan areas are shown in Map 6.6.

| Plan Area                 | Residential      | Mixed Resid     | Office          | Retail          | PDR             | CIE             | Hotel          | Mixed Uses      | Public/ OS       | Vacant          | Other           | TOTAL              |
|---------------------------|------------------|-----------------|-----------------|-----------------|-----------------|-----------------|----------------|-----------------|------------------|-----------------|-----------------|--------------------|
| Balboa                    | 288.5            | 214.0           | 12.7            | 1,589.8         | 39.8            | 611.8           | 0.0            | 133.5           | 1,210.4          | 3,638.2         | 0.0             | 7,738.7            |
| Bayview                   | 17,838.4         | 990.9           | 2,042.0         | 1,530.0         | 18,409.2        | 10,763.2        | 21.7           | 993.8           | 7,992.2          | 13,145.1        | 149.0           | 73,875.6           |
| C-3                       | 171.7            | 508.3           | 3,468.7         | 1,131.5         | 353.1           | 406.1           | 749.9          | 1,404.9         | 226.9            | 422.2           | 51.6            | 8,894.8            |
| Central Waterfront        | 359.0            | 374.9           | 609.6           | 321.7           | 9,542.1         | 39.4            | 0.0            | 279.6           | 3,428.8          | 3,322.9         | 0.0             | 18,278.0           |
| East Soma                 | 922.8            | 1,794.2         | 1,287.3         | 513.1           | 1,556.1         | 89.6            | 51.0           | 774.5           | 712.3            | 1,398.0         | 22.6            | 9,121.5            |
| Geary                     | 12,939.3         | 726.5           | 184.9           | 1,464.9         | 204.6           | 2,538.2         | 163.6          | 485.3           | 730.1            | 492.8           | 0.0             | 19,930.2           |
| Hunters Point Shipyard    | 0.0              | 0.0             | 0.0             | 0.0             | 101.6           | 0.0             | 0.0            | 30,889.6        | 0.0              | 3,960.7         | 0.0             | 34,952.0           |
| Market/Octavia            | 5,029.0          | 1,124.0         | 925.8           | 838.3           | 443.8           | 1,301.8         | 57.6           | 420.0           | 565.1            | 1,053.1         | 1.0             | 11,759.6           |
| Mid-Market                | 41.9             | 256.8           | 625.6           | 216.1           | 140.2           | 109.5           | 123.5          | 241.1           | 54.2             | 432.5           | 43.6            | 2,285.1            |
| Mission                   | 11,640.7         | 2,370.8         | 623.9           | 1,929.0         | 3,001.1         | 1,674.1         | 30.9           | 1,174.6         | 637.6            | 1,552.6         | 0.0             | 24,635.4           |
| Mission Bay               | 1,694.6          | 1,744.9         | 0.0             | 341.9           | 298.8           | 173.7           | 0.0            | 48.4            | 225.1            | 6,414.9         | 510.6           | 11,452.9           |
| Port                      | 0.0              | 0.0             | 472.1           | 206.4           | 5,350.1         | 0.0             | 0.0            | 0.0             | 22,669.7         | 3,714.5         | 0.0             | 32,412.8           |
| Presidio                  | 0.0              | 0.0             | 0.0             | 0.0             | 0.0             | 0.0             | 0.0            | 0.0             | 65,584.0         | 0.0             | 0.0             | 65,584.0           |
| Rest of the City          | 350,090.6        | 39,699.0        | 4,161.1         | 12,535.0        | 1,953.9         | 36,816.3        | 1,717.4        | 3,863.8         | 162,196.7        | 29,777.9        | 21,119.2        | 663,930.9          |
| Rincon Hill               | 256.3            | 260.0           | 444.9           | 126.0           | 26.6            | 67.5            | 0.0            | 36.7            | 0.0              | 247.2           | 0.0             | 1,465.3            |
| Showplace Sq/Potrero Hill | 7,640.3          | 447.6           | 809.2           | 1,005.7         | 2,631.5         | 2,160.5         | 0.0            | 880.4           | 691.1            | 3,374.3         | 180.8           | 19,821.6           |
| Transbay                  | 28.0             | 16.1            | 543.9           | 145.3           | 215.6           | 5.0             | 0.0            | 21.4            | 0.0              | 722.6           | 3.6             | 1,701.6            |
| Van Ness                  | 703.8            | 542.9           | 208.0           | 409.1           | 298.9           | 220.0           | 201.7          | 336.9           | 0.0              | 97.4            | 0.0             | 3,018.7            |
| Visitacion Valley         | 8,229.2          | 232.3           | 13.1            | 95.8            | 1,185.9         | 299.8           | 0.0            | 10.8            | 595.8            | 1,191.5         | 109.1           | 11,963.2           |
| West Soma                 | 934.7            | 673.1           | 982.8           | 1,013.3         | 2,610.0         | 217.1           | 52.8           | 797.0           | 10.2             | 1,455.9         | 17.1            | 8,763.9            |
| Yerba Buena               | 35.2             | 185.6           | 208.0           | 351.2           | 7.4             | 184.5           | 193.4          | 128.9           | 330.0            | 580.9           | 0.0             | 2,205.1            |
| <b>TOTAL</b>              | <b>418,844.2</b> | <b>52,162.1</b> | <b>17,623.4</b> | <b>25,764.3</b> | <b>48,370.4</b> | <b>57,678.1</b> | <b>3,363.4</b> | <b>42,921.4</b> | <b>267,860.1</b> | <b>76,995.2</b> | <b>22,208.1</b> | <b>1,033,790.7</b> |

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**TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2008 (CONTINUED)**

| Percentage Distribution by Planning Area |             |             |            |            |            |            |            |            |             |            |            |              |
|--|-------------|-------------|------------|------------|------------|------------|------------|------------|-------------|------------|------------|--------------|
| Plan Area                                | Residential | Mixed Resid | Office     | Retail     | PDR        | 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        |
| Visitacion 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        |
| <b>TOTAL</b>                             | <b>40.5</b> | <b>5.0</b>  | <b>1.7</b> | <b>2.5</b> | <b>4.7</b> | <b>5.6</b> | <b>0.3</b> | <b>4.2</b> | <b>25.9</b> | <b>7.4</b> | <b>2.1</b> | <b>100.0</b> |

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**TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2008 (CONTINUED)**

| Plan Area                 | Residential  | Mixed Resid  | Office       | Retail       | PDR          | 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          |
| Visitacion 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          |
| <b>TOTAL</b>              | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

**Notes:**  
 • Public/OS = Public and Open Space; PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

**Sources:**  
 • San Francisco Office of the Assessor-Recorder  
 • San Francisco Planning Department  
 • Dun & Bradstreet



**Planning Department Plan Areas  
San Francisco 2008**

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 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 eight 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 biennial mode splits from 2000 through 2008; however, data for employees was available only from 2004 to 2008.

- *Table 7.1 Mode Split for Commuters, 2000 - 2008*
  - Less than 39% 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 2008. Working from home dipped slightly in 2008 for both residents and employees.

## 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 2008 are listed by zoning district.

- *Table 7.2 Parking Entitlements, 2004-2008* — Parking entitlements, similar to building permits, tend to fluctuate greatly based on large projects. In 2008, parking spaces in projects increased 73% over those in 2007. The number of projects with parking was up 56%. One-third of the 2008 parking spaces were in RM-1 (Residential, Mixed, Low Density) district with another 30% in C-3 (Downtown Commercial) and P (Public) 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 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.

The data is presented in Table 7.3.

- *Table 7.3 Private Vehicle Occupancy in San Francisco, 2000-2008* — The private vehicle occupancy rate rose 2.7% from 2006 to 2008 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. No information was available for 2008.

- *Table 7.4 Transit Ridership on MUNI Lines, 2005-2007* — 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 2008 dollars.

- *Table 7.5 TIDF Revenues Collected (Inflation-Adjusted), Fiscal Years 2002-2008* — 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 2008 revenues dropped by 56% from those collected in Fiscal Year 2007.

**TABLE 7.1 MODE SPLIT FOR COMMUTERS, 2000-2008**

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         | 2008         | 2004         | 2006         | 2008         |
| Drive Alone     | 41.0         | 42.4         | 42.3         | 40.5         | 38.4         | 38.8         | 37.7         | 36.5         |
| Carpool/Vanpool | 9.3          | 8.7          | 8.7          | 7.7          | 8.4          | 11.9         | 10.5         | 11.1         |
| Transit         | 32.2         | 30.8         | 29.6         | 30.3         | 31.9         | 34.9         | 35.8         | 36.4         |
| Walk            | 6.5          | 8.0          | 8.2          | 9.6          | 9.4          | 5.9          | 6.9          | 6.7          |
| Bicycle         | 1.8          | 2.1          | 1.8          | 2.3          | 2.7          | 1.6          | 1.5          | 2.0          |
| Work at Home    | 4.8          | 6.5          | 7.7          | 7.6          | 7.5          | 5.3          | 5.4          | 5.3          |
| Other           | 4.4          | 1.5          | 1.7          | 2.0          | 1.7          | 2.0          | 2.2          | 2.0          |
| <b>TOTAL</b>    | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> | <b>100.0</b> |

**Source:**

• US Census, American Community Surveys 2000, 2002, 2004, 2006, 2008

**TABLE 7.2 PARKING ENTITLEMENTS, 2004-2008**

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

| Zoning District | 2004      |              | 2005      |              | 2006      |              | 2007      |              | 2008      |              |
|-----------------|-----------|--------------|-----------|--------------|-----------|--------------|-----------|--------------|-----------|--------------|
|                 | Projects  | Net Spaces   | 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          | 4         | 347          |
| C-M             |           |              |           |              |           |              | 1         | 40           | 2         | 70           |
| DTR             |           |              |           |              | 2         | 616          |           |              |           |              |
| M-1             | 3         | 368          | 3         | 468          |           |              |           |              | 1         | 10           |
| M-2             | 2         | 186          | 1         | 35           | 1         | 163          |           |              |           |              |
| NC-1            |           |              |           |              |           |              | 2         | 24           | 1         | 49           |
| NC-2            |           |              |           |              |           |              | 1         | 24           | 3         | 125          |
| NC-3            | 2         | 21           | 1         | 48           | 3         | 189          | 2         | 100          | 2         | 62           |
| NCD             | 1         | 12           | 2         | 42           | 2         | 18           | 1         | 37           | 3         | 161          |
| P               | 1         | 25           |           |              |           |              |           |              | 1         | 310          |
| RC-4            | 1         | 2            | 7         | 626          |           |              | 1         | 35           | 2         | 180          |
| RH-1            | 1         | 4            |           |              |           |              | 1         | 1            |           |              |
| RH-2            | 1         | 216          | 2         | 3            |           |              |           |              | 1         | 1            |
| RH-3            | 1         | 1            | 1         | 3            |           |              |           |              | 1         | 28           |
| RM-1            | 1         | 4            |           |              |           |              | 1         | 7            | 1         | 739          |
| RM-3            | 1         | 1            |           |              |           |              | 1         | 39           | 1         | 2            |
| RM-4            |           |              | 2         | 367          |           |              |           |              |           |              |
| RSD             | 1         | 40           | 1         | 14           |           |              |           |              |           |              |
| SLI             | 2         | 13           |           |              |           |              |           |              | 2         | 131          |
| SLR             | 1         | 20           | 1         | 42           | 1         | 11           | 2         | 58           |           |              |
| SSO             | 1         | 35           |           |              | 1         | 44           |           |              |           |              |
| <b>TOTAL</b>    | <b>22</b> | <b>1,191</b> | <b>27</b> | <b>2,399</b> | <b>27</b> | <b>2,399</b> | <b>16</b> | <b>1,281</b> | <b>25</b> | <b>2,215</b> |

**Note:**

- "C" refers to commercial districts
- "DTR" refers to downtown residential districts
- "M" refers to PDR 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, 2000-2008**

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 | 2008 |
|-------------------------|------|------|------|------|------|
| San Francisco Residents | 1.22 | 1.20 | 1.20 | 1.11 | 1.14 |

**Sources:**  
 US Census American  
 Community Survey, 2000,  
 2002, 2004, 2006, 2008



**TABLE 7.4** TRANSIT RIDERSHIP ON MUNI LINES, 2005-2007

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 |
|----------------------------|-----------------|--------|--------|----------------------|-------------------|
| <b>1, 1AX, 1BX</b>         | California      | 29,896 | 26,108 | -3,788               | -12.7%            |
| <b>2</b>                   | Clement         | 5,635  | 7,113  | 1,478                | 26.2%             |
| <b>3</b>                   | Jackson         | 3,649  | 4,216  | 567                  | 15.5%             |
| <b>4</b>                   | Sutter          | 3,942  | 1,697  | -2,245               | -57.0%            |
| <b>5</b>                   | Fulton          | 13,184 | 14,039 | 855                  | 6.5%              |
| <b>6</b>                   | Parnassus       | 6,610  | 7,158  | 548                  | 8.3%              |
| <b>7</b>                   | Haight          | 5,863  | 1,693  | -4,170               | -71.1%            |
| <b>9, 9AX, 9BX, 9X</b>     | San Bruno       | 28,645 | 32,197 | 3,552                | 12.4%             |
| <b>10</b>                  | Townsend        | 3,056  | 3,155  | 99                   | 3.2%              |
| <b>12</b>                  | Folsom          | 7,376  | 6,928  | -448                 | -6.1%             |
| <b>14, 14L, 14X</b>        | Mission         | 47,147 | 40,500 | -6,647               | -14.1%            |
| <b>15</b>                  | Third Street    | 30,440 | 29,524 | -916                 | -3.0%             |
| <b>16AX, 16BX</b>          | Noriega Express | 1,643  | 1,822  | 179                  | 10.9%             |
| <b>17</b>                  | Parkmerced      | 1,510  | 1,348  | -162                 | -10.7%            |
| <b>18</b>                  | 46th Avenue     | 3,578  | 3,414  | -164                 | -4.6%             |
| <b>19</b>                  | Polk            | 10,395 | 9,232  | -1,163               | -11.2%            |
| <b>21</b>                  | Hayes           | 12,279 | 8,749  | -3,530               | -28.7%            |
| <b>22</b>                  | Fillmore        | 22,806 | 18,892 | -3,914               | -17.2%            |
| <b>23</b>                  | Monterey        | 4,529  | 4,421  | -108                 | -2.4%             |
| <b>24</b>                  | Divisadero      | 11,355 | 10,717 | -638                 | -5.6%             |
| <b>26</b>                  | Valencia        | 4,245  | 2,944  | -1,301               | -30.6%            |
| <b>27</b>                  | Bryant          | 9,157  | 7,415  | -1,742               | -19.0%            |
| <b>28</b>                  | 19th Avenue     | 9,924  | 9,689  | -235                 | -2.4%             |
| <b>29</b>                  | Sunset          | 16,596 | 14,961 | -1,635               | -9.9%             |
| <b>30, 30X</b>             | Stockton        | 31,186 | 26,160 | -5,026               | -16.1%            |
| <b>31, 31AX, 31BX</b>      | Balboa          | 10,280 | 10,705 | 425                  | 4.1%              |
| <b>33</b>                  | Stanyan         | 6,167  | 5,536  | -631                 | -10.2%            |
| <b>35</b>                  | Eureka          | 737    | 734    | -3                   | -0.4%             |
| <b>36</b>                  | Teresita        | 1,015  | 1,762  | 747                  | 73.6%             |
| <b>37</b>                  | Corbett         | 1,421  | 1,789  | 368                  | 25.9%             |
| <b>38, 38L, 38AX, 38BX</b> | Geary           | 51,124 | 56,473 | 5,349                | 10.5%             |
| <b>39</b>                  | Coit            | 404    | 390    | -14                  | -3.5%             |
| <b>41</b>                  | Union           | 3,345  | 3,060  | -285                 | -8.5%             |
| <b>43</b>                  | Masonic         | 14,264 | 12,765 | -1,499               | -10.5%            |
| <b>44</b>                  | O'Shaughnessy   | 13,275 | 12,872 | -403                 | -3.0%             |

CONTINUED &gt;

**TABLE 7.4 TRANSIT RIDERSHIP ON MUNI LINES, 2005-2007 (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%             |
| <b>TOTAL</b> |                      | <b>668,254</b> | <b>650,985</b> | <b>-17,269</b>       | <b>-2.6%</b>      |

Source: San Francisco Municipal Transportation Agency

**TABLE 7.5** TRANSIT IMPACT DEVELOPMENT FEE (TIDF) REVENUE COLLECTED  
(INFLATION-ADJUSTED), FISCAL YEARS 2002-2008

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2001-2002, inflation adjusted to reflect costs in 2008.

| Fiscal Year | Fee Structure  | Collections (2008 \$) |
|-------------|----------------|-----------------------|
| 2001 - 2002 | 1981 Ordinance | \$9,024,347           |
| 2002 - 2003 | 1981 Ordinance | \$4,524,214           |
| 2003 - 2004 | 2004 Ordinance | \$1,496,904           |
| 2004 - 2005 | 2004 Ordinance | \$1,016,642           |
| 2005 - 2006 | 2004 Ordinance | \$11,901,530          |
| 2006 - 2007 | 2004 Ordinance | \$2,044,236           |
| 2007 - 2008 | 2004 Ordinance | \$889,475             |

# ACKNOWLEDGMENTS

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*With assistance from:*

Association of Bay Area Governments (ABAG)

Bureau of Labor Statistics

U.S. Census Bureau

California Department of Finance

California Employment Development Department

California State Board of Equalization

Cushman & Wakefield

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San Francisco Controller's Office

San Francisco Department of Building Inspection