



# SAN FRANCISCO PLANNING DEPARTMENT

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December 6, 2018

Dear Planning Commissioners:

The San Francisco Planning Department would like to present you with a copy of the recently published *2017 Commerce and Industry Inventory*. This annual publication provides information on the city's economy and land use with data through 2017.

The *2017 Commerce and Industry Inventory* is divided into four sections: (1) About the 2017 Commerce & Industry Inventory, (2) Infographic Highlights, (3) Findings: The SF Economy in 2017, and (4) the Appendix.

The *About* section describes the format and approach. The *Infographic Highlights* presents key findings in simple, bold graphics. The *Findings* section summarizes the main points arising from this annual update of the Inventory.

The Appendix contains the detailed data tables and description of methodology. The Department gathers data on employment, number and size of businesses, wages, and building activity for the Inventory from various public and private agencies. In the *Appendix*, the data is presented in a consistent format that allows for comparisons and cross-references. The various indicators are extensively described with tables, graphs, and maps.

Should you wish to access the report in PDF format online, it can be found at:

[http://default.sfplanning.org/publications\\_reports/Commerce\\_Industry\\_Inventory\\_Report\\_2017.pdf](http://default.sfplanning.org/publications_reports/Commerce_Industry_Inventory_Report_2017.pdf)

Should you have any questions, comments or suggestions regarding the Commerce and Industry Inventory, please feel free to call Ken Qi, Planner, at (415) 575-9029 (or email: [ken.qi@sfgov.org](mailto:ken.qi@sfgov.org)).

Sincerely yours,

A handwritten signature in black ink, appearing to read "John Rahaim".

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# 2017

## SAN FRANCISCO COMMERCE & INDUSTRY INVENTORY



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3	4

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**2017** **SAN FRANCISCO  
COMMERCE & INDUSTRY  
INVENTORY**

SAN FRANCISCO PLANNING DEPARTMENT  
DECEMBER 2018



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# About the 2017 Commerce & Industry Inventory

This is the 24th *Commerce & Industry Inventory* prepared by the San Francisco Planning Department. It presents findings and data on economic activities in San Francisco from 2008 through 2017, including population, labor force, employment, establishments, wages, retail sales, monetary transactions, building activity, land use, and transportation.

The short-term 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 land use-related data and compile background information for the periodic update of the *Commerce and Industry Element* of the *San Francisco General Plan*.

The 2017 Commerce & Industry Inventory is organized as follows:

1. **About the 2017 Commerce & Industry Inventory**
2. **Infographic Highlights**
3. **Findings: San Francisco Economy in 2017**
4. **2017 Data Appendix**

The first three sections summarize key points from this year's data. The Appendix contains updated data tables, continuing the time series from the past ten years.

## FORMAT OF THE 2017 COMMERCE & INDUSTRY INVENTORY

The **Infographic Highlights** presents key findings in simple, bold graphics, and is available as a stand-alone document. **Findings: The San Francisco Economy in 2017** summarizes key points for 2017. The **Appendix** contains the full data tables and describes the methodology.

A spreadsheet of the C&I data is also available electronically on the Planning Department's website, along with the document and links to the data on DataSF (<https://data.sfgov.org>).

The Planning Department welcomes your thoughts and suggestions for improving the *Commerce & Industry Inventory*. You can send them to [ken.qi@sfgov.org](mailto:ken.qi@sfgov.org)

## THE DATA APPENDIX

The Data Appendix contains seven chapters:

- **1.0 Introduction** explains data formats, economic indicators, variables, industrial classification system.
- **2.0 Regional Overview** presents the San Francisco Bay Area's economy in historical and geographical context for four subregions.
- **3.0 Employment** presents data for Industry Group, Land Use Category, and Commerce and Industry (C&I) District.
- **4.0 Establishments** presents data on the number and distribution of active business establishments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size.
- **5.0 Monetary Transaction** includes data on wages, taxable retail sales and sales permits, city government revenues and expenditures.
- **6.0 Building and Land Use** presents the number of building permit applications and total construction cost estimated for all permit applications, including those for new construction and demolitions/alterations. Permit application status is reported for the current year only. The square footage of the land use footprint is presented by planning area.
- **7.0 Transportation** includes commuter transportation mode, net added parking spaces, private vehicle occupancy rate, transit ridership, and Transit Impact Development Fee (TIDF) revenues.

The rest of this "About" section summarizes information regarding data and method that is useful for understanding the Infographic and the Findings sections. Appendix Chapter 1.0, Introduction, describes data and method in detail.

### Data Formats

This Inventory presents economic data in terms of time, type of activity, and geographic distribution. Economic indicators use various metrics, such as employees, establishments, and dollars. This Inventory groups data in three ways: (1) Land Use Category, (2) Commerce and Industry Districts, and (3) Industry Group. By using three specific data formats or groupings of the data,

the Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators.

The following section describes these groups as background for reading the **Infographic Highlights**, and the **Findings**. Readers will find a more detailed discussion of the data and tables in **Appendix Chapter 1, Introduction**.

### **Commerce & Industry (C&I) Districts**

The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. *Map 1.1* in the Appendix shows their boundaries. Commerce and Industry Districts reflect the geographic variation in the concentration of land uses, as follows.

- The **Financial District** includes the city's densest area with the highest concentration of employment and establishments.
- The **Civic Center** has high concentrations of institutional and government activities.
- The **Van Ness** district encompasses a commercial corridor surrounded by mid- to high-density residential buildings.
- The **Mission** and **North Beach** districts have intense local retail activities and distinct identities for the local and visitor populations.
- The **South of Market (SoMa)** district contains a unique mix of office, Production/Distribution/Repair, residential and other uses, and contains a historic building stock adaptable to a range of uses.
- The **Bayview** district houses a high concentration of PDR activities and has a relatively low density of population, employment, and establishments.
- The **North Central** district contains a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and more residential areas to the west.
- The **Southwest** and **Northwest** districts are pre-

dominantly residential, with businesses concentrated in mostly local-serving neighborhood commercial districts. Overall business density is low.

- The **Unclassified** category represents home-based business establishments and organizations without physical addresses, particularly care givers, which 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.

### **Land Use Categories**

The classification of land use categories used in the C&I, and more broadly by the Planning Department, is unique to San Francisco. It was developed to facilitate the evaluation of economic information – such as employment, establishments, and transactions – related to land use policy development. The classification system matches type of economic activity with a corresponding type of land use, building structure, and land use pattern. The basis of this classification system is San Francisco's business activities and land use pattern. Thus, application of this land use classification system outside of San Francisco would require some adjustments.

The six Land Use categories include (1) Office, (2) Retail, (3) Production/Distribution/Repair (PDR), (4) Hotel, (5) Cultural/Institutional/Educational (CIE), and (6) Residential. The Residential land use category is used only in Appendix Chapter 6 for data on building permits and land use by plan areas. The definitions of each of these categories 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 bank branches.

- **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, and beauty shops.
- **Production/Distribution/Repair (PDR) activity** includes establishments related to processing, movement, and repair of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation (including vehicle maintenance and repair), information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and 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 of Visitor 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.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, is tracked separately beginning in 2009 (because of improved data reporting). This land use category involves households located throughout San Francisco that contract for and employ workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/

caretakers, and other household maintenance workers. Starting in 2014, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

### **Industry Groups**

The Inventory uses the *North American Industry Classification System (NAICS)*. The NAICS classifies all business establishments based on similarity of business process used to produce goods or services. NAICS organizes all economic activity into 20 broad sectors to clearly establish and distinguish each industry sector from the other.

For simplicity, this *Commerce & Industry Inventory* uses the following 11 categories based on combining some NAICS industry sectors (see Appendix [Table 1.1](#)):

- (1) Farm;
- (2) Natural Resources, Mining and Construction;
- (3) Manufacturing;
- (4) Trade, Transportation, Utilities;
- (5) Information;
- (6) Financial Activities;
- (7) Professional and Business Services;
- (8) Educational and Health Services;
- (9) Leisure and Hospitality;
- (10) Other Services; and
- 11) Government.

The Other Services group includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. The Government group includes all civilian employees of federal, state, and local government, regardless of the activity of employee engagement.

# **Infographic Highlights**

## 2017 Commerce & Industry Inventory

SUMMARY

2017

Change from 2016

JOB

714,700 ▲1.6%

UNEMPLOYMENT RATE

2.9% ▼ FROM 3.3%

ESTABLISHMENTS

59,560 ▲0.4%

TOTAL WAGES CITYWIDE

\$77.9B ▲5.6%

AVERAGE WAGE PER JOB

\$109,000 ▲3.9%

BUILDING PERMITS

SEE TABLE 6.1.1.A

29,534 ▲2.7%

CONSTRUCTION SPENDING

\$3.8B ▼42%

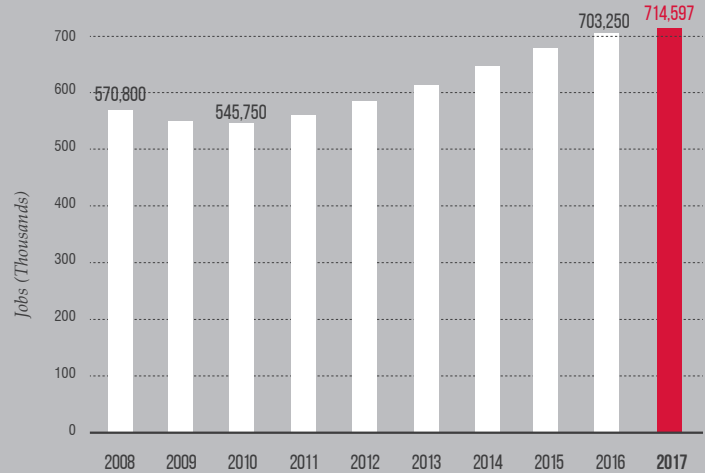
CITY REVENUE

\$6.0B ▲3%

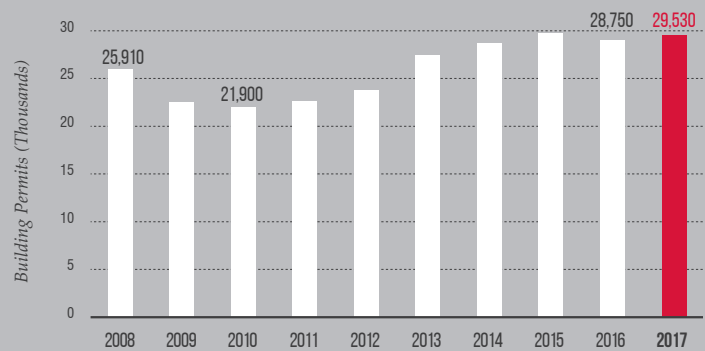
CITY EXPENDITURE

\$5.3B ▲5%

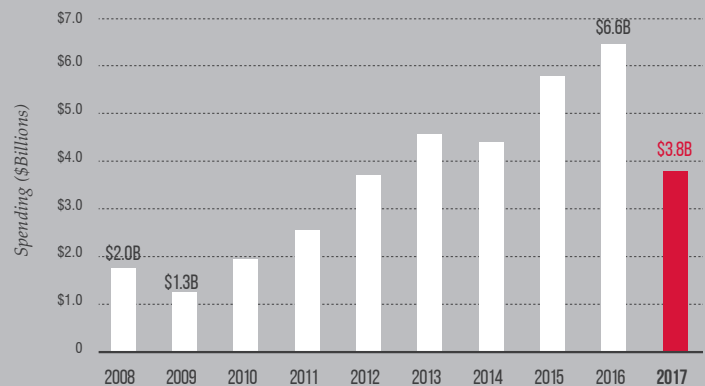
JOB



BUILDING PERMITS



CONSTRUCTION SPENDING





SAN FRANCISCO IN THE REGION

# Small area. Large role.



LAND AREA (SQ. MILES)

**47**

*San Francisco*

**7,041**

*Region*

San Francisco covers just 0.7% of the region's land area but contains:

- 11% of the region's population
- 18% of the region's employment

**2017 POPULATION**

**884,000** *San Francisco*      **7,772,600** *Region*



**Record high city and regional population.**

**POPULATION CHANGE**

**4.5%**<sup>▲</sup> *San Francisco*      **5.4%**<sup>▲</sup> *Region*  
 2008–2017 (10 YEAR)

**1.11%**<sup>▲</sup> *San Francisco*      **0.75%**<sup>▲</sup> *Region*  
 2016–2017 (1 YEAR)

**Continued population growth in the city and region.**

**2017 UNEMPLOYMENT RATE**

**2.9%** *San Francisco*      **3.4%** *Bay Area*      **4.8%** *State*  
 ▼ FROM 2016      ▼ FROM 2016      ▼ FROM 2016

**Lower unemployment rate than region and State.**

**2017 JOBS**

**714,700** *San Francisco*      **3,912,600** *Region*



**Jobs are more heavily concentrated in SF compared to the region.**

**JOB GROWTH**

**25%**<sup>▲</sup> *San Francisco*      **18%**<sup>▲</sup> *Region*  
 2008–2017 (10 YEAR)

**1.6%**<sup>▲</sup> *San Francisco*      **2.3%**<sup>▲</sup> *Region*  
 2016–2017 (1 YEAR)

**SF job growth is lower than region for the first time in 10 yrs.**

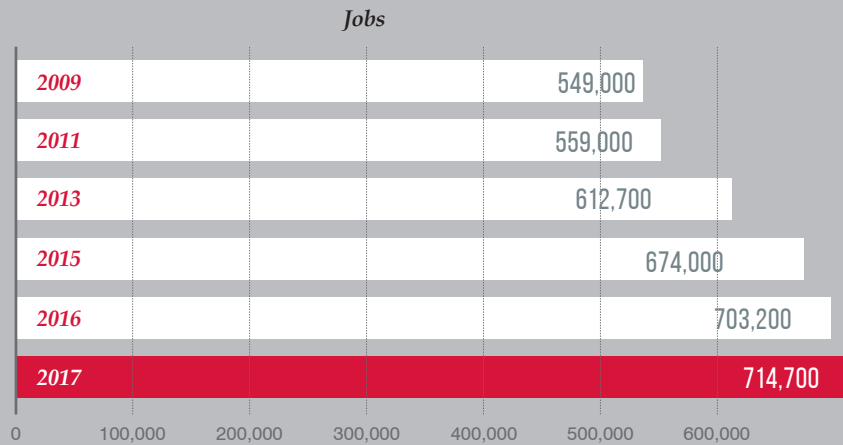
**JOB GROWTH BY SECTOR 2016-17**

<i>Employment Sector</i>	<i>San Francisco</i>	<i>Region</i>
INFORMATION	6.4%	9%
CONSTRUCTION	1%	3.4%
FINANCIAL ACTIVITIES	0.3%	0.4%
TRADE, TRANSPORTATION & UTILITIES	5%	1%
LEISURE & HOSPITALITY	-0.5%	2.2%

- The region outpaced the City in 4 out of the 5 fastest growing job sectors.
- This shows a reverse trend from last year.

**EMPLOYMENT IN SAN FRANCISCO**

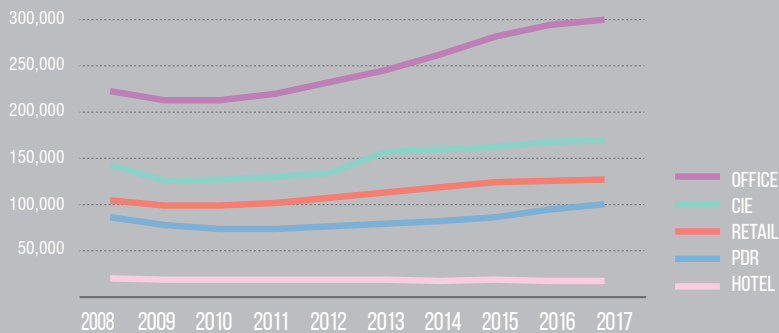
Employment up 2% in the past year, 25% over the decade.



Employment varied over the decade, but has grown steadily since 2010.

**SAN FRANCISCO JOBS BY LAND USE**

SEE TABLE 3.1



While jobs continued to grow, they were slowing down from previous years.

Employment in all land uses grew over the decade except for Hotel jobs, which declined 17%.

**SHARE OF JOBS BY LAND USE**

Land Use Category	2008	2016	2017
OFFICE	38%	42%	42%
RETAIL	18%	18%	18%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	15%	13%	14%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	25%	24%	24%
HOTEL	3%	2%	2%
PRIVATE HOUSEHOLDS	—	1%	1%

**CHANGE IN # OF JOBS**

	2016-17	2008-17
OFFICE	2%	35%
RETAIL	1%	22%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	5%	17%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	1%	19%
HOTEL	-2.3%	-17%
PRIVATE HOUSEHOLDS	-10%	—

ESTABLISHMENTS IN SAN FRANCISCO

# Establishments grew 0.4% from 2016.

TOTAL ESTABLISHMENTS (2017)

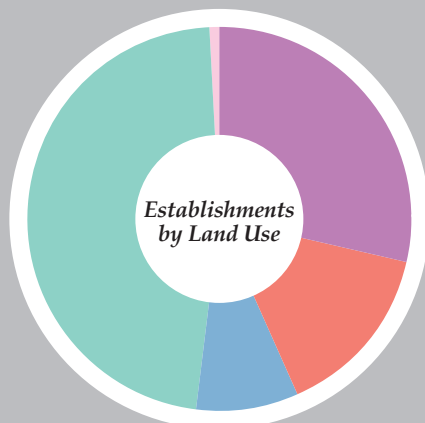
59,560

▲ 0.4%

Change from 2016

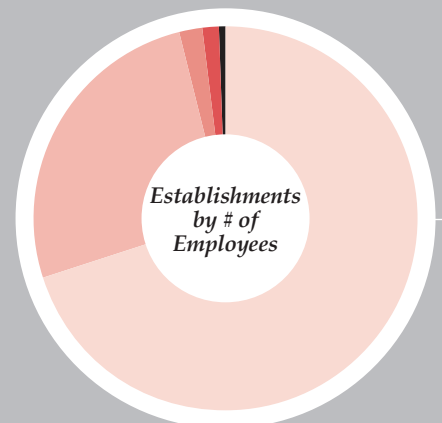
BY LAND USE CATEGORY

	2017	Change 2008–17	
<i>Non Private Household</i>			
OFFICE	13,989	24%	24%
RETAIL	8,464	14%	13%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	4,878	8%	1%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	26,792	45%	29%
HOTEL	306	1%	6%
	54,429	100%	▲ 22%
<i>Private Household</i>			
PRIVATE HOUSEHOLDS	5,132	8.6%	–



BY NUMBER OF EMPLOYEES

	Firms	
<i>Excluding Private Household</i>		
0–4	37,665	69%
5–49	14,571	27%
50–99	1,219	2%
100–249	642	1%
250+	334	1%
	54,431	100%

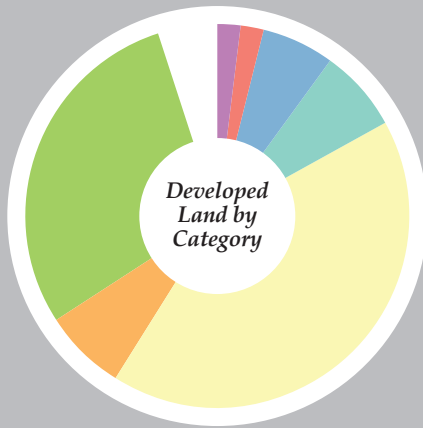


LAND USE & BUILDING IN SAN FRANCISCO

# Land Area

**TOTAL LAND AREA** **DEVELOPED** **STREETS & FREEWAYS**  
**47 SQ. MILES** **71% 988M** *Sq. ft.* **29%**

**DEVELOPED LAND AREA (988M SQ. FEET)**



*Land Use Category*

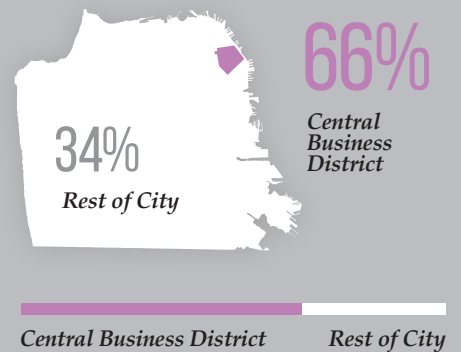
OFFICE	2%
RETAIL	2%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	6%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	7%
HOTEL	0%
RESIDENTIAL	43%
MIXED USE / OTHER	7%
PUBLIC / OPEN SPACE	29%
VACANT	5%

# Office Space

**2017 TOTAL OFFICE SPACE**  
**78.1 M** *Sq. ft.* **0.5%** **▲ 8%**  
*Change from 2016* *Change from 2008*

5.8 million square feet of office space added over the last ten years.

**SHARE OF OFFICE SPACE**



Roughly 2/3rds of the city's office space is in the Central Business District.

# Building Permits

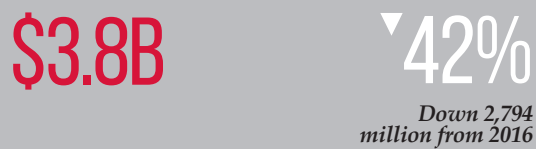
## 2017 BUILDING PERMITS



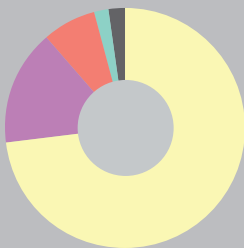
## 2017 BUILDING PERMIT STATUS



## BY CONSTRUCTION COST

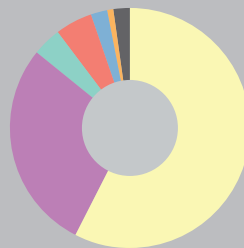


## BY NUMBER OF PERMITS



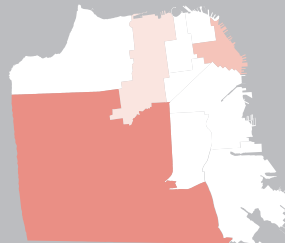
Land Use Category		
RESIDENTIAL	71%	
OFFICE	15%	
RETAIL	7%	
CIE	2%	
PDR & HOTEL	2%	

## BY CONSTRUCTION COST



Land Use Category		
RESIDENTIAL	57%	
OFFICE	28%	
CIE	4%	
RETAIL	5%	
PDR	2%	
HOTEL	1%	
OTHER	2%	

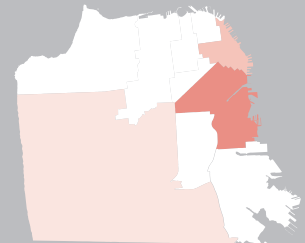
## BY NUMBER OF PERMITS



District Location		
SOUTHWEST	31%	
FINANCIAL	13%	
NORTH CENTRAL	14%	

## BY CONSTRUCTION COST

SEE TABLE 6.2.1.B



District Location		
SOMA	24%	
FINANCIAL	18%	
SOUTHWEST	18%	

The Southwest district has the highest number of permits, but the value of construction spending is highest in SoMa.

The majority of permits are for Residential and Office projects.



TRANSPORTATION IN SAN FRANCISCO

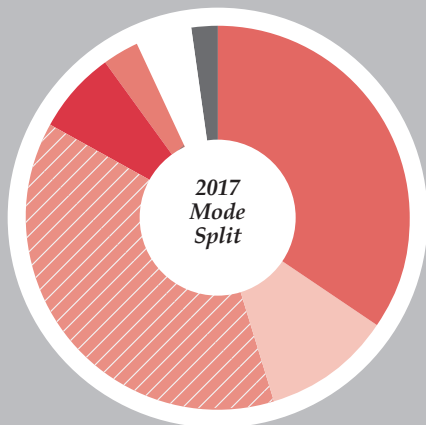
# Transit use for communiting continues to grow.

# Car commuting continues to fall.

HOW EMPLOYEES IN SAN FRANCISCO COMMUTED TO WORK

Mode	2012	2017	Change
DRIVE ALONE	35%	33%	-6%
CARPPOOL / VANPOOL	10%	8%	-16%
TRANSIT	38%	40%	5%
WALK	7%	8%	13%
BICYCLE	3%	2%	-19%
WORK AT HOME	5%	5%	0%
OTHER	2%	4%	60%

SEE TABLE 7.1



PRIVATE VEHICLE OCCUPANCY (2012–2017)

1.14 PERSONS PER VEHICLE 2012 **1.13** 2017

DAILY MUNI RIDERSHIP (2012–2017)

693,880 2012 **692,000** 2017

Daily MUNI ridership down 0.3% since 2012.

BUSIEST MUNI LINES

Line	2012 Daily Trips	2017	Change
38 GEARY	55,000	53,000	▼
N JUDAH	40,500	57,300	▲
14 MISSION	44,200	48,000	▲

TRANSIT IMPACT DEVELOPMENT FEE REVENUE

**\$48.1M** FY 2016–2017

SEE TABLE 7.5

**CITY GOVERNMENT**

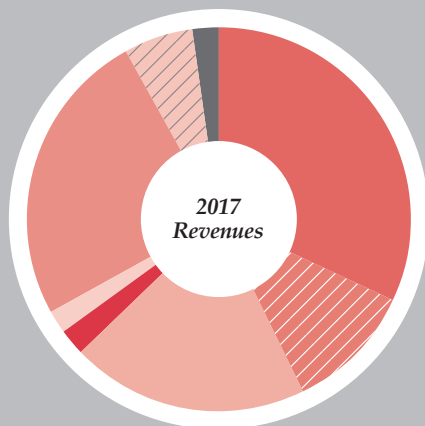
# City revenues up 3%. Spending on services up 5%.

**2017 CITY REVENUE**

**\$6.0B** ▲ 3%  
Change from 2016

*Revenue Source*

PROPERTY TAXES	32%
BUSINESS TAXES	12%
OTHER LOCAL TAXES	22%
LICENSES, PERMITS, FINES & PENALTIES	1%
INTEREST & INVESTMENT INCOME	0.6%
RENTS & CONCESSIONS	2%
INTERGOVERNMENTAL	21%
CHARGES FOR SERVICES	6%
OTHER	3%

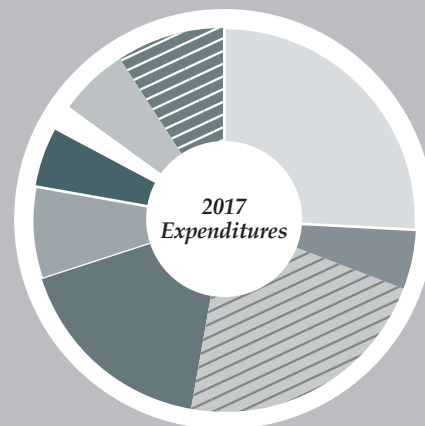


**2017 CITY EXPENDITURE**

**\$5.3B** ▲ 5%  
Change from 2016

*Expenditure Function*

PUBLIC PROTECTION	25%
PUBLIC WORKS, TRANSPORTATION & COMMERCE	6%
HUMAN WELFARE & NEIGHBORHOOD DEVELOPMENT	27%
COMMUNITY HEALTH	13%
CULTURE & RECREATION	7%
GENERAL ADMINISTRATION & FINANCE	6%
GENERAL CITY RESPONSIBILITIES	2%
DEBT SERVICE	8%
CAPITAL OUTLAY	6%



# **Findings: San Francisco Economy in 2017**

## SUMMARY

### *Continued growth in jobs and development activity*

A quick review of the main data in the *Commerce & Industry Inventory* reveals many positive signs, indicating continued economic growth in 2017.

- Employment grew for the seventh straight year, from 703,230 jobs to a record-breaking 714,700 jobs. The city gained 11,470 jobs in 2017, representing 1.6% growth over the previous year.
- The unemployment rate in San Francisco continued to fall, from 3.3% to 2.9%. The region's unemployment rate for 2017 was 3.4%.
- The number of business establishments grew to 59,560 firms, up 0.4% from 2017.
- Workers' earnings in the San Francisco economy increased to \$77.9 billion, 5.6% over 2016, with average earnings per job increasing to \$109,000 per worker.
- The number of building permit applications increased by 2.7% from the previous year, to 29,534 applications. However, the estimated value or spending those projects represent in terms of project cost (not all of which will be spent locally in San Francisco) decreased 42% to \$3.8 billion from 2017.
- City revenue was \$6.0 billion, up 3% over 2016, while expenditures increased 5% to \$5.3 billion.

## SAN FRANCISCO IN THE REGION

### *City growth is slowing down compared to the region*

For the first time since the last recession, San Francisco appears to be growing slower in jobs than the region as a whole, but maintains a faster population growth.

San Francisco's population increased 1.11% in the past year, to 884,000 residents. This represents a 4.5% increase over the past decade. In comparison, the regional population of 7.77 million grew slightly slower last year, increasing 0.75% from 2016-2017, but faster over the decade (5.4%).

Employment in San Francisco grew by 1.6% in 2017, to a record 714,700 jobs. Over the past decade, this represents a 25% increase in employment in the city. In comparison, regional employment grew 2.3% in the past year, and 18% between 2008 and 2017, to 3.9 million jobs.

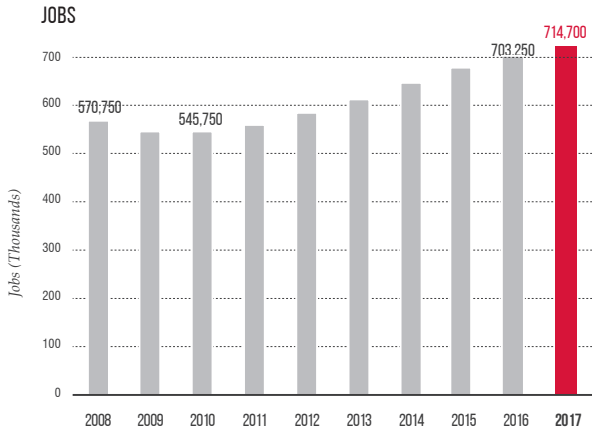
San Francisco's share of regional employment decreased slightly between 2008 and 2017, from 18.4% of all jobs in the region to 18.2%. The *Fastest Growing Job Sectors 2017* table below shows San Francisco's job growth from 2016 to 2017 is behind the region's in all but one of the top five fastest growing job sectors in San Francisco Information, Construction, Trade & Transportation and Leisure & Hospitality).

San Francisco's declining unemployment rate - 2.9% in 2017 - was lower than the regional rate of 3.4%, the State rate of 4.8%, and the nationwide rate of 4.9%.

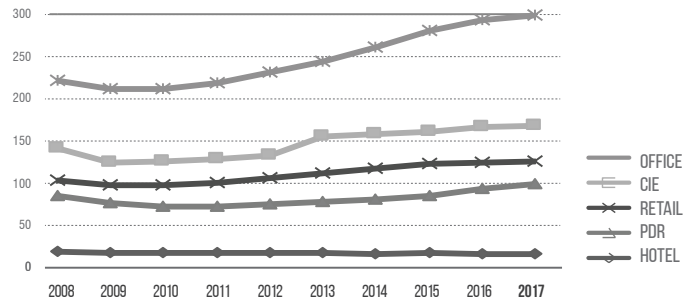
### *Job Sectors Growth 2017*

<i>Employment Sector</i>	<i>San Francisco</i>	<i>Comparison</i>	<i>Region</i>
Information	6.4%	Slower	9%
Construction	1%	Slower	3.4%
Financial Activities	0.3%	Slower	0.4%
Trade & Transportation	5%	Faster	1%
Leisure & Hospitality	-0.5%	Slower	2.2%
<b>Overall Job Growth</b>	<b>1.6%</b>	<b>Slower</b>	<b>2.3%</b>

### San Francisco Employment by Land Use Category



JOBS BY LAND USE CATEGORY



## EMPLOYMENT

### Trends

The past 10 years cover a turbulent time in San Francisco's economy, including the height of the speculative financial bubble in 2008, the global recession that followed, and the city's strong recovery since 2010. In 2007 the San Francisco economy was growing, and would reach 570,800 jobs in 2008 before the Great Recession caused a 4% dip to 549,000 jobs in 2009. However, after showing signs of recovery in 2011, employment in the city has grown by between 4% and 5% every year starting in 2012, and is now at an all-time high of 714,700 jobs.

As the *San Francisco Employment by Land Use Category* graphs illustrate, jobs in the office, CIE, retail, and PDR land use categories generally followed a pattern similar to total jobs: a peak in 2008, a trough in 2010, and growth since then.<sup>1</sup> Only hotel jobs show a longer term decline over the full decade, and continued decline from 2016 to 2017 despite growth in overall jobs.

### Sectoral Composition and Geographic Concentration

The share of employment by land use category, and their relative ranking, has shifted somewhat between 2008 and 2017 (see *Employment by Land Use* table below) with the proportion of office jobs rising (from 39% to 42% of all jobs) as PDR jobs fell from 15% to 13%. While PDR jobs have actually grown over the past decade, that growth has been overshadowed by large, +20% increases in office, retail and CIE jobs, and thus they make up a smaller proportion of the San Francisco economy today.

### Employment by Land Use

Land Use Category	Sector Shares			Rate of Change	
	2008	2016	2017	2008-17	2016-17
Office	39%	42%	42%	35%	1.8%
Retail	18%	18%	18%	22%	1%
PDR	15%	13%	13%	17%	5%
Hotel	3%	2%	2%	-17%	-2.3%
CIE	25%	24%	24%	20%	1%
Pvt HH	-	1%	1%	na	-10%
TOTAL	570,778	703,233	714,697	26%	1.6%

1. CIE employment from 2002-2008 estimated based on the share of private household to total CIE employment in years 2009-2012.

## ESTABLISHMENTS

San Francisco had 59,560 establishments in 2017, a 0.4% increase from 2016. Approximately 9% of these, or 5,132 establishments, were private households,<sup>2</sup> 9% decrease from 5,654 in 2016, most likely employing less than five workers per establishment. To understand San Francisco establishments better, private household establishments were separated from non-household firms. The 54,429 non-household firms make up 91% of San Francisco establishments in 2017. By land use category, 45% are CIE, 24% are Office land uses, 14% are Retail, 8% are PDR and less than 1% are Hotel.

Private household establishments are located in residences and in areas designated for residential land use. Like home-based businesses, they are a secondary commercial use that supports and does not displace or otherwise change the primary residential use. They can be accommodated in residential land uses and do not require the land use policy attention that commercial uses require.

2. The Private household establishment and land use category involves households located throughout San Francisco that contract for and employ workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, house cleaners, butlers, private caregivers, gardeners, grounds keeper/caregivers, and other household maintenance workers.

The 34% increase in total establishments between 2007 and 2018 corresponds with employment growth over the same period. Change by land use type reveals slight increase in PDR establishments over the period, but substantial gains in CIE, office and retail (29%, 24% and 13%, respectively) establishments.

The vast majority of establishments in San Francisco employ fewer than 50 employees. 69% of non-household establishments in San Francisco employ fewer than 5 workers (see *2017 Non-Private Household Establishments by Size* table below), and 27% employ 5-49 workers.

### Establishments 2008–2017

Land Use	Number			Share 2017	Change	
	2008	2016	2017		2008-17	2016-17
Office	11,292	13,578	13,989	24%	24%	3%
Retail	7,473	8,403	8,464	14%	13%	1%
PDR	4,812	4,799	4,878	8%	1%	2%
Hotel	288	304	306	1%	6%	1%
CIE	20,710	26,564	26,792	45%	29%	1%
Subtotal	44,575	53,648	54,429		22%	1%
Pvt HH		5,654	5,132	7%	--	-9%
TOTAL	44,575	59,302	59,561		34%	0.4%

### 2017 Non-Private Household Establishments by Size

# of Employees	Number of Firms	Share
0-4	37,665	69%
5-49	14,571	27%
50-99	1,219	2%
100-249	642	1%
250+	334	1%
TOTAL	53,431	100%



## MONETARY TRANSACTIONS

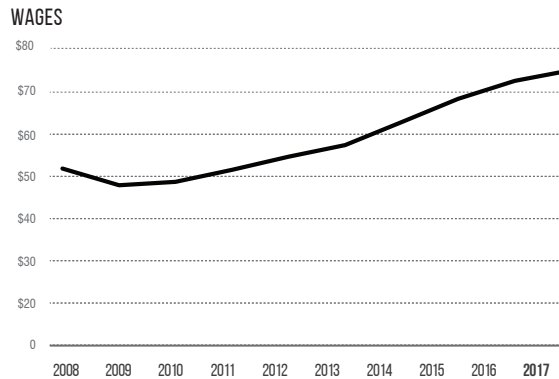
### Wages

Wage and salary workers in San Francisco earned \$77.9 billion in 2017, up 5.6% from 2016 and 46% from 2008 (inflation adjusted). Total wages followed the larger trend of the economy, growing when employment grew and dipping during the last recession. Approximately 62% (\$48.7B) of the total is earned by office workers with the remainder earned by workers in the following land use sectors: 15% in CIE, 15% in PDR, 7% in Retail, and 1% in Hotel. The average wage in San Francisco is \$109,000, with office workers earning the highest average wage (\$163,132), followed by PDR workers (\$114,200). Workers in CIE, Hotel, and Retail earn less than the citywide average, at \$68,600, \$51,100, and \$40,600, respectively, while Private Household workers average a wage of \$59,300.

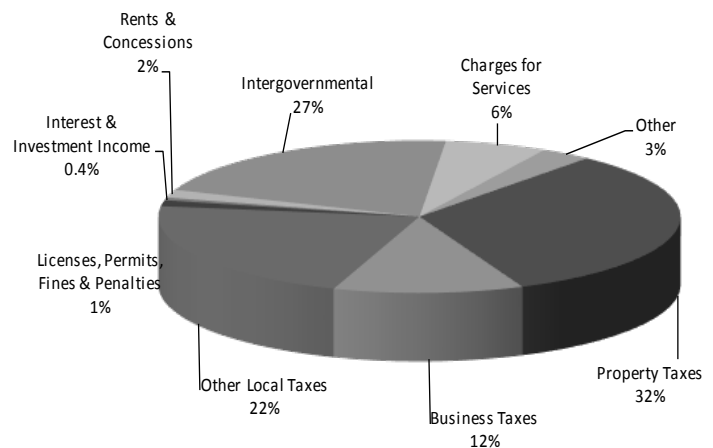
### City Revenues and Expenditures

In Fiscal Year 2017 (July 1, 2016 through June 30, 2017), City revenues amounted to \$6.0B, up 3% over 2016. City expenditures were lower than revenues, at \$5.3B, and grew 5% over 2016. Property Taxes were the City's largest revenue source, making up 32% of total revenue, and Public Protection (25% of all expenditures) was the highest City expenditure category.

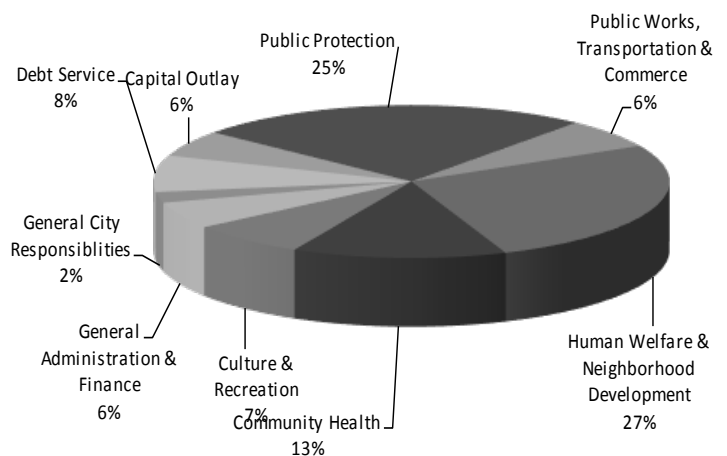
*Total Wages (2017 \$s)*



*City Revenue 2017 (\$6.0 Billion)*



*City Expenditures 2017 (\$5.3 Billion)*



## LAND AREA AND BUILDING

### Land Area

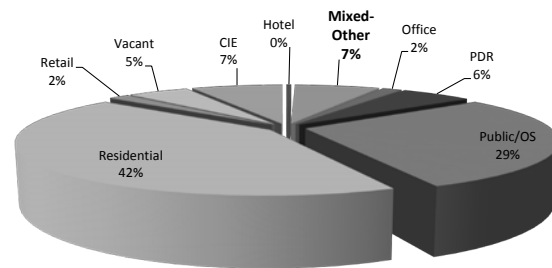
San Francisco has 46.9 square miles of land area, of which 71% is developed, while the remaining 29% are used for streets or freeways. Residential uses form the majority of San Francisco’s land use footprint, occupying 42% of the city’s land area, followed by Public and Open Space at 29%, and Commercial uses at 17% (6% PDR, 2% Office, 0.4% Hotel, and 7% CIE). Mixed uses occupy 7% of the area while 5% of land area is vacant.

### Building Permit Applications

In 2017, there were 29,500 active building permit applications in San Francisco, an decrease of 3% from 2016. Approximately 98% of building permit applications were for demolition or alteration projects (versus for new construction or for signs, etc). The total value of building permit applications in terms of estimated construction cost was \$3.8 billion in 2017, a 42% decrease from 2016 (\$6.6B) but a 91% increase over 2008 (\$2.0B). As shown in *Building Permit Applications by Type 2017* below, permits for new construction, despite making up less than 1% of all permits, represented 36% or \$1.4B in value, while permits for demolition and construction, which make up 97% of all permits, represented \$2.B, or 63%.

Overall, most active permits were for Residential land uses (71%), followed by 15% for Office and 7% for Retail uses. In terms of construction cost, 57% of the building permit applications’ cost was for residential projects, while 28% was for Office and 14% for CIE uses.

### Developed Land Area (988MSF)



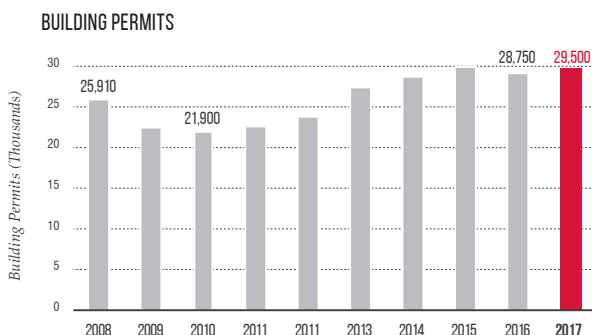
Residential permits were more numerous but smaller in scope, while office projects tended to have higher construction costs.

Approximately 56% of active building permit applications completed construction in 2017, with another 32% approved or issued but not yet complete, 1% cancelled, and 10% not yet acted upon, abandoned, reinstated, or appealed (Other). Geographically, the Southwest C&I district saw the highest number of permit applications (31% of the total), followed by the Financial and North Central (13%, 14%) C&I districts. The C&I districts with the highest concentration of construction costs were the SOMA (24%) and Financial (18%) districts.

### Central Business District (CBD) Office Space

Of the 78 million square feet of office space in San Francisco, approximately 66% is in the Central Business District (generally the Financial District north and south of Market Street). San Francisco has added 5.8 msf of office space since 2008, an 8% increase. The CBD added 4.6 msf of office space, an increase of 10%.

### Building Permit Applications



### Building Permit Applications by Type 2017

Land Use	All Permits		New Construction Permits		Demolition + Alteration Permits	
	Number	Value	Number	Value	Number	Value
Office	15%	28%	0.02%	4%	15%	25%
Retail	7%	5%	0.02%	0%	7%	5%
PDR	1%	2%	0.02%	0%	1%	1%
Hotel	1%	1%	0.00%	0%	1%	1%
CIE	2%	14%	0.01%	1%	2%	4%
Residential	71%	57%	0.36%	31%	72%	25%
Other	3%	2%	0.00%	0%	1%	2%
<b>Total</b>	<b>29,534</b>	<b>\$3.8b</b>	<b>127</b>	<b>\$1.4b</b>	<b>28,767</b>	<b>\$2.4b</b>
<i>Share of total</i>	<i>100%</i>	<i>100%</i>	<i>0.43%</i>	<i>36%</i>	<i>97%</i>	<i>63%</i>

## TRANSPORTATION

The *Commerce & Industry Inventory* presents basic data on San Francisco mobility in terms of commute mode split, parking entitlements, vehicle occupancy, transit ridership, and the Transit Impact Development Fee Revenue (TIDF).

### Commuter Mode Split

Data on mode split from 2012 and 2017 for workers commuting to San Francisco jobs (from within and outside the city) indicate that commuting by car, whether driving alone or in a carpool, has declined in popularity, while transit use continues to grow. In 2017, 33% of commute trips were made “driving alone,” down 2 points from 35% in 2012. Transit's share increased 2 points over that same period, from 38% in 2012 to 40% in 2017.

### Private Vehicle Occupancy

Private vehicle occupancy during commute trips for workers commuting to San Francisco jobs (from within and outside the city) between 2012 and 2017 fell slightly, from 1.14 to 1.13, indicating a further decline in the popularity of carpooling.

### Daily Transit Ridership

Muni ridership remained steady from 2012 to 2016, increasing slightly to 696,400 average daily rides. The 38-Geary lines continue to have the highest ridership, with 43,000 average daily trips, followed by the N-Judah at 50,400 trips, and the 14-Mission lines at 46,500 trips. (see Table 7.4 in the Appendix for details).

### Transit Development Impact Fee

The Transit Impact Development Fee (TIDF) revenue was \$37.5 million in FY2016, up from \$14.2 million in FY2015. Annual TIDF revenue can vary widely, as the amount collected is based on the amount of development that occurs. Total revenues collected since FY2005 amount to \$86.7 million.

### Commuter Mode Split -

#### San Francisco Employees

	2012	2016	2017	2012-2017	2016-2017
Drive Alone	35%	33.2%	32.7%	-6%	-0.4%
Carpool/Vanpool	9.7%	8.9%	8.2%	-16%	-0.7%
Transit	38.3%	40.1%	40.3%	5%	0.2%
Walk	7.1%	7.4%	8.1%	13%	0.7%
Bicycle	2.7%	2.7%	2.2%	-19%	-0.5%
Work at Home	4.9%	4.3%	4.9%	0%	0.6%
Other	2.2%	3.4%	3.5%	60%	0.2%

### Daily Transit Ridership

Route Nos.	Route Name	2012	2017	2012-2017	
				Number	Rate
38, 38L, 38AX, 38BX	Geary	55,042	52,900	-2,142	-4%
N, Nx	Judah	40,529	47,300	6,771	17%
14, 14L, 14X	Mission	44,162	48,000	3,838	8.7%
All Routes		693,881	692,000	-1,881	-0.3%

# 2017 Data Appendix



Photo by Ken Qi, SF Planning

# 1.0 Introduction

This Data Appendix is organized into seven chapters.

- **Chapter 1 – Introduction** defines the data formats, economic indicators and the variables contained within each data set, and two industry classification systems used in the series of Inventories 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 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 light industrial operations are performed. The chapter presents data on the number and distribution of active business establish-

ments 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. The permit applications by permit status are reported only for the current year. 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.

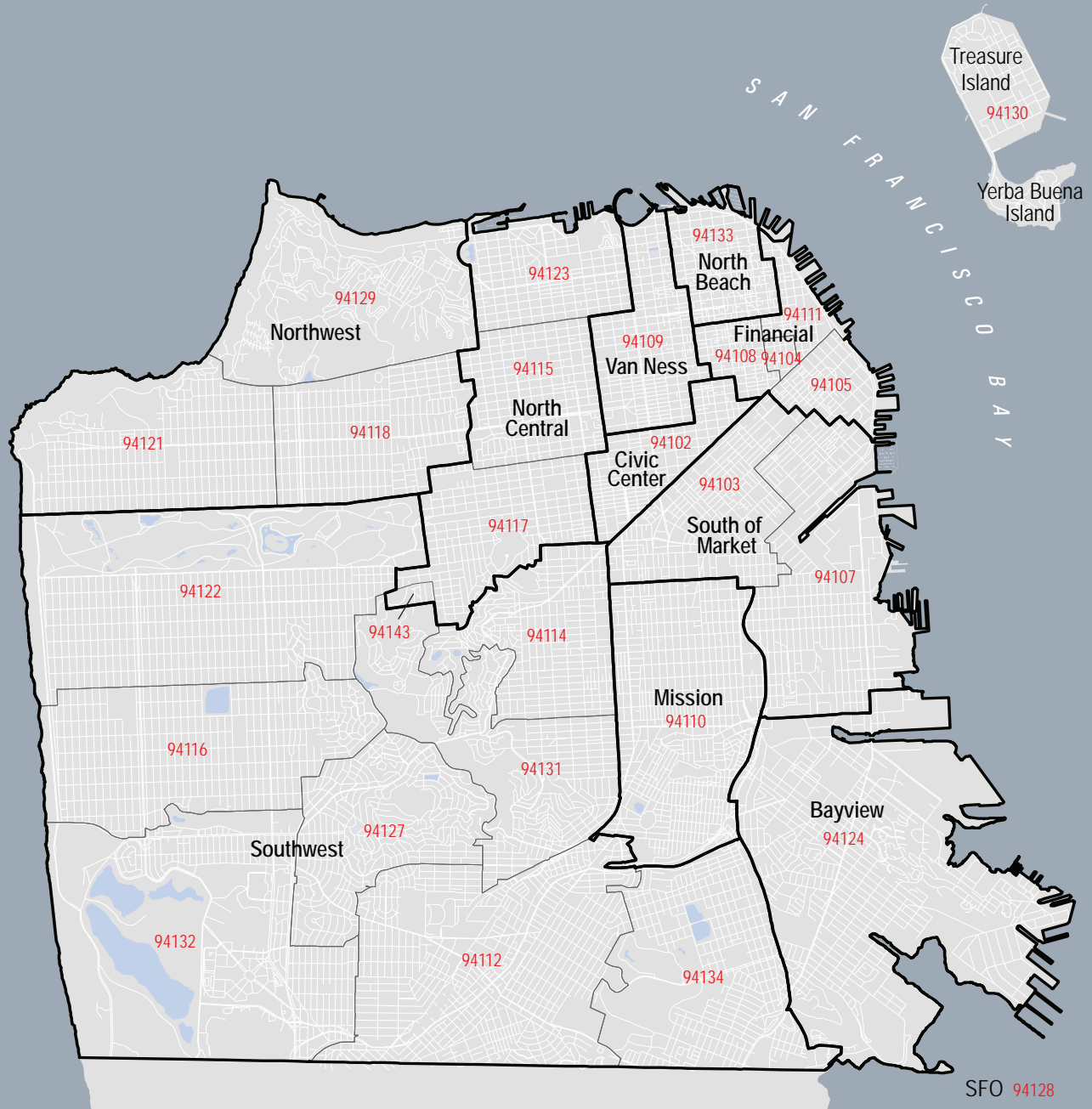
- The **Financial District** covers the densest area with the highest concentration of employment and establishments.
- The **Civic Center** is defined by its high concentration of institutional and government activities.
- The **Van Ness** district runs along a commercial corridor surrounded by mid- to high-density residential buildings.
- The **Mission** and **North Beach** districts are characterized by intense local retail activities and have very defined identities for the local and visitor population.
- The **South of Market** district contains a combination of office and PDR activities, located between the Financial District and Bayview.
- The **Bayview** district houses a high concentration of Production/Distribution/Repair (PDR) activities and shows a low density in terms of population, employment, and establishments.





PACIFIC OCEAN

SAN FRANCISCO BAY



## Commerce and Industry Districts San Francisco

0 Miles 1

**MAP 1.1**



District Boundaries  
Zip Code Boundaries



- 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 **Southwest** and **Northwest** districts are predominantly residential, with a very low business density.

**Unclassified.** 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, that 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.

### Plan Areas

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 (see *Map 6.2*). The neighborhood district boundaries tend to follow more homogenous economic patterns than the zip code-based Commerce and Industry districts.

### Land Use Categories

This classification facilitates the evaluation of economic information – such as employment, establishments, and transactions – related to types of land use relevant to land use policy development. It matches the type of economic activity with a corresponding type of use and 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 outside of the city may require some adjustments.

The six Land Use categories used in this Inventory are: (1) Office, (2) Retail, (3) Production/Distribution/Repair (PDR), (4) Hotel, (5) Cultural/Institutional/Educational (CIE), and (6) 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, engineer-

ing, 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, and beauty shops.
- **Production/Distribution/Repair (PDR)** activity includes establishments related to processing, movement, and repair of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation (including vehicle maintenance and repair), information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and 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 or Visitor** 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.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, is tracked separately beginning in 2009 (because of improved data reporting). This land use category involves households located throughout San Francisco that contract for and employ

workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/caretakers, and other household maintenance workers. Starting in 2014, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

### **Industry Groups**

This classification aggregates business establishments into Industry groups according to similarity of production process. The *North American Industry Classification System* (NAICS) is the current classification system. It was released in 1997 and last revised in 2007. It replaced the previous *Standard Industry Classification* (SIC) system based on similarity of product produced.

The United States Department of Commerce developed these two systems and the California Employment Development Department (EDD) adopted them. *Commerce & Industry Inventories 2002-2011* have a discussion of the relationship between the two classification systems because data from 2000 and earlier used the SIC system and data from 2001 onwards used the NAICS system (see *Tables 1.1* and *1.2*). *Commerce & Industry Inventory 2011* onwards, have an abbreviated discussion of the two classification systems because the 10-year time series uses the NAICS system exclusively.

The NAICS classifies all business establishments based on similarity of 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 categories of economic activities. The first four digits represent industry group, while the five and six digit classifications correspond to specific industries.

NAICS organizes all economic activity into 20 broad sectors (in contrast to the 10 sectors of the earlier SIC classification system). The purpose for this broad categorization is to clearly establish and distinguish each industry sector from another. NAICS also defined 350 new industries, including several new high-tech and services related industries which were not appropriately defined and recognized in the previous SIC system.

For simplicity, this *Commerce & Industry Inventory* uses the following 11 categories based on combining some NAICS' industry sectors (see *Table 1.1*): (1) Farm; (2) Natural Resources, Mining and Construction; (3) Manufacturing; (4) Trade, Transportation, Utilities; (5) Information; (6) Financial Activities; (7) Professional and Business Services; (8) Educational and Health Services; (9) Leisure and Hospitality; (10) Other Services; and (11) Government. The Other Services group includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. The Government group includes all civilian employees of federal, state, and local government, regardless of the activity in which employees are engaged.

The Inventory also uses Land Use Categories, as discussed above, to organize data for land use policy making purposes. *Table 1.2* illustrates the correspondence between NAICS industrial sectors and San Francisco's Land Use Activity Categories.

**Table 1.1****MAJOR INDUSTRY CLASSIFICATION CATEGORIES**

<i>Industry grouping used in the Commerce And Industry Inventory</i>	<i>North American Industry Classification System (NAICS)</i>		
	<i>S.N.</i>	<i>Code</i>	<i>Sectors</i>
<b>1. Farm</b>	<b>1</b>	<b>11</b>	Agriculture, Forestry, Fishing and Hunting
<b>2. Natural Resources, Mining and Construction</b>	<b>2</b>	<b>21</b>	Mining
	<b>3</b>	<b>23</b>	Construction
<b>3. Manufacturing</b>	<b>4</b>	<b>31-33</b>	Manufacturing
<b>4. Trade, Transportation, Utilities</b>	<b>5</b>	<b>48-49</b>	Transportation and Warehousing
	<b>6</b>	<b>22</b>	Utilities
	<b>8</b>	<b>42</b>	Wholesale Trade
	<b>9</b>	<b>44-45</b>	Retail Trade
<b>5. Information</b>	<b>7</b>	<b>51</b>	Information
<b>6. Financial Activities</b>	<b>10</b>	<b>52</b>	Finance and Insurance
	<b>11</b>	<b>53</b>	Real Estate and Rental and Leasing
<b>7. Professional and Business Services</b>	<b>12</b>	<b>54</b>	Professional, Scientific, and Technical Services
	<b>13</b>	<b>55</b>	Management of Companies and Enterprises
	<b>14</b>	<b>56</b>	Administrative and Support, Waste Management and Remediation Services
<b>8. Educational and Health Services</b>	<b>15</b>	<b>61</b>	Education Services
	<b>16</b>	<b>62</b>	Health Care and Social Assistance
	<b>17</b>	<b>71</b>	Arts, Entertainment, and Recreation
<b>9. Leisure and Hospitality</b>	<b>18</b>	<b>72</b>	Accommodation and Food Services
<b>10. Other Services</b>	<b>19</b>	<b>81</b>	Other Services (except Public Administration)
<b>11. Government</b>	<b>20</b>	<b>92</b>	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

		<i>North American Industry Classification System (NAICS)</i>	
<i>San Francisco Planning Department Land Use Category</i>	<i>Industry Group</i>	<i>NAICS Code</i>	
<b>Office</b>	<b>Agriculture</b>	111-115	
		211-213	
	<b>Finance</b>	522-523	
	<b>Insurance</b>	524-525	
	<b>Real Estate</b>	531, 533	
		516	
		518	
	<b>Office Services</b>	519	
		541	
		551	
	561		
	<b>Public Administration</b>	921-928	
<b>Retail</b>	<b>General Merchandise</b>	452	
	<b>Food Stores</b>	445	
	<b>Apparel Stores</b>	448	
	<b>Eating &amp; Drinking Places</b>	722	
		441, 447	
		442	
	<b>Other Retail Stores</b>	443, 446, 451	
		453-454	
		532	
	<b>Personal &amp; Repair</b>	811-812	
<b>Production/Distribution/Repair (PDR)</b>	<b>Construction</b>	236-238	
		488	
		485, 487	
	<b>Transportation and Warehousing</b>	484, 492-493	
		491	
		481, 483	
		486	
	<b>Utilities</b>	221	
		562	
	<b>Information</b>	515	
	517		
<b>Wholesale</b>	423-425		
<b>Food Manufacturing</b>	311-312		
<b>Apparel Manufacturing</b>	313-315		
<b>Printing and Publishing</b>	323, 511		
	321-322, 337		
	324-325		
<b>Other Manufacturing</b>	316, 326-327		
	331-333		
	334-335		
<b>Repair Services</b>	336		
<b>Transp. Equipment, Building Supplies</b>	339, 444		
<b>Film &amp; Sound Recording</b>	512		
<b>Hotel or Visitor</b>	<b>Accommodation</b>	721	
		711	
<b>Cultural/Institutional/Educational (CIE)</b>	<b>Art and Recreation</b>	711	
	<b>Performing arts, amusement parks</b>	713	
	<b>Education Services</b>	611	
	<b>Health Care</b>	621-623	
	<b>Social Assistance</b>	624	
		712	
	<b>Other CIE Services</b>	813	
<b>Private Households</b>	<b>Private Households (Pvt HH)</b>	814	
	<b>Unclassified Establishments</b>	999	

**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 nine counties of the 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 for analysis in this chapter: North Bay, East Bay, South Bay, and San Francisco. These sub-regions were initially identified 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 time series data 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 describes the residents of each subregion regardless of where they work in terms of population, labor force, number of employed residents, and unemployment. These concepts are described below. For context, unemployment data is also provided for California and the United States. The second set describes the workers in each subregion regardless of where they live in terms of regional employment by industry groups and then regional employment by subregion by industry group.

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 comes from the California State Department of Finance (DoF). These data are based on the 2010 Census numbers with yearly updates which take into account city/county surveys of building permits, construction activity, and overall housing stock; tallying of administrative records from local, state, and federal agencies including driver's license data, school registration, and birth and death certificate records; and tracking the status of military bases. The DoF population estimates are generally 3% to 5% higher than those of the Census Bureau.

- **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.



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

0 Miles 20

**MAP 2.1**



**Table & Figure 2.1.1**

**BAY AREA POPULATION BY SUB-REGION, 2008–2017**

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)**

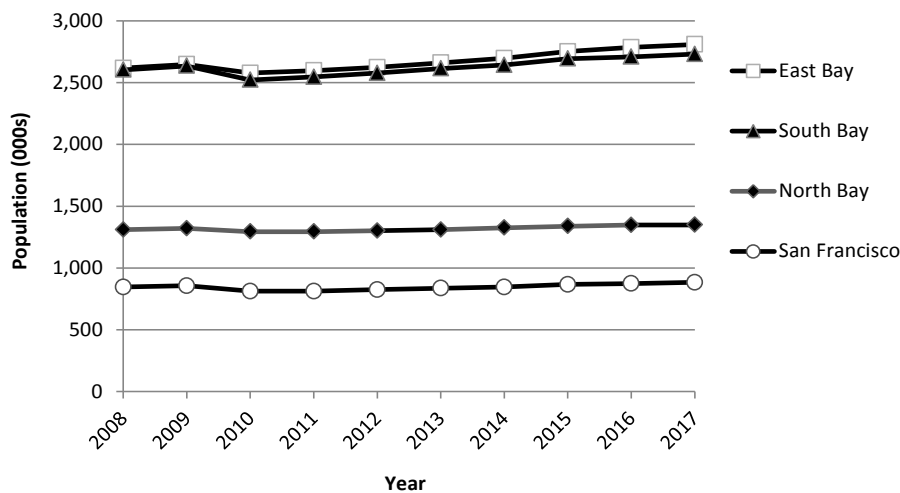
Sub-Region	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	1,309.5	1,320.7	1,294.0	1,293.8	1,301.2	1,309.8	1,325.1	1,337.8	1,347.2	1,348.3
East Bay	2,617.1	2,647.9	2,577.2	2,597.3	2,623.4	2,660.3	2,697.4	2,751.3	2,784.9	2,809.6
South Bay	2,603.5	2,635.2	2,522.1	2,545.9	2,577.9	2,613.8	2,642.8	2,693.9	2,708.4	2,730.8
San Francisco	845.6	856.1	812.1	812.5	825.1	836.6	845.6	866.6	874.2	884.0
<b>TOTAL</b>	<b>7,375.7</b>	<b>7,459.9</b>	<b>7,205.4</b>	<b>7,249.6</b>	<b>7,327.6</b>	<b>7,420.5</b>	<b>7,510.9</b>	<b>7,649.6</b>	<b>7,714.6</b>	<b>7,772.6</b>

**Annual Percentage Distribution**

Sub-Region	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	17.8	17.7	18.0	17.8	17.8	17.7	17.6	17.5	17.5	17.3
East Bay	35.5	35.5	35.8	35.8	35.8	35.9	35.9	36.0	36.1	36.1
South Bay	35.3	35.3	35.0	35.1	35.2	35.2	35.2	35.2	35.1	35.1
San Francisco	11.5	11.5	11.3	11.2	11.3	11.3	11.3	11.3	11.3	11.4
<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**

Sub-Region	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
North Bay	0.9	-2.0	0.0	0.6	0.7	1.2	1.0	0.7	0.1
East Bay	1.2	-2.7	0.8	1.0	1.4	1.4	2.0	1.2	0.9
South Bay	1.2	-4.3	0.9	1.3	1.4	1.1	1.9	0.5	0.8
San Francisco	1.2	-5.1	0.1	1.5	1.4	1.1	2.5	0.9	1.1
<b>TOTAL</b>	<b>1.1</b>	<b>-3.4</b>	<b>0.6</b>	<b>1.1</b>	<b>1.3</b>	<b>1.2</b>	<b>1.8</b>	<b>0.9</b>	<b>0.8</b>



**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: City and County of San Francisco

**Source:**  
US Census, CA Department of Finance, E-1 City / County Population Estimates.

**Table & Figure 2.1.2****BAY AREA LABOR FORCE BY SUB-REGION, 2008–2017**

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)**

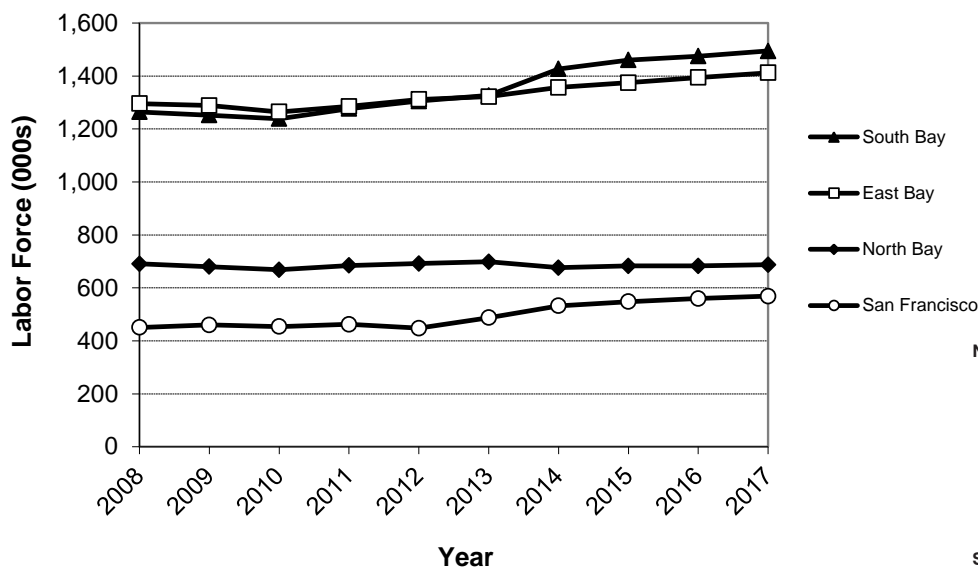
Sub-Region	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	690.4	679.9	668.1	684.6	692.0	698.5	676.3	682.8	682.9	687.3
East Bay	1,295.7	1,288.6	1,264.5	1,285.0	1,311.7	1,322.0	1,356.9	1,374.7	1,394.4	1,412.4
South Bay	1,264.3	1,252.0	1,238.7	1,276.5	1,305.3	1,326.8	1,426.9	1,460.4	1,475.1	1,494.3
San Francisco	450.4	459.8	453.8	462.5	447.6	487.2	532.4	548.0	559.8	568.8
TOTAL	3,700.8	3,680.3	3,625.1	3,708.6	3,756.6	3,834.5	3,992.5	4,065.9	4,112.2	4,162.8

**Annual Percentage Distribution**

Sub-Region	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	18.7	18.5	18.4	18.5	18.4	18.2	16.9	16.8	16.6	16.5
East Bay	35.0	35.0	34.9	34.6	34.9	34.5	34.0	33.8	33.9	33.9
South Bay	34.2	34.0	34.2	34.4	34.7	34.6	35.7	35.9	35.9	35.9
San Francisco	12.2	12.5	12.5	12.5	11.9	12.7	13.3	13.5	13.6	13.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Percentage Change**

Sub-Region	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
North Bay	-1.5	-1.7	2.5	1.1	0.9	-3.2	1.0	0.0	0.6
East Bay	-0.5	-1.9	1.6	2.1	0.8	2.6	1.3	1.4	1.3
South Bay	-1.0	-1.1	3.1	2.3	1.6	7.5	2.3	1.0	1.3
San Francisco	2.1	-1.3	1.9	-3.2	8.8	9.3	2.9	2.2	1.6
TOTAL	-0.6	-1.5	2.3	1.3	2.1	4.1	1.8	1.1	1.2

**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: City and County of San Francisco

**Source:** CA Employment Development Department, annual averages (not seasonally adjusted).

**Table & Figure 2.1.3**

**BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 2008–2017**

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)**

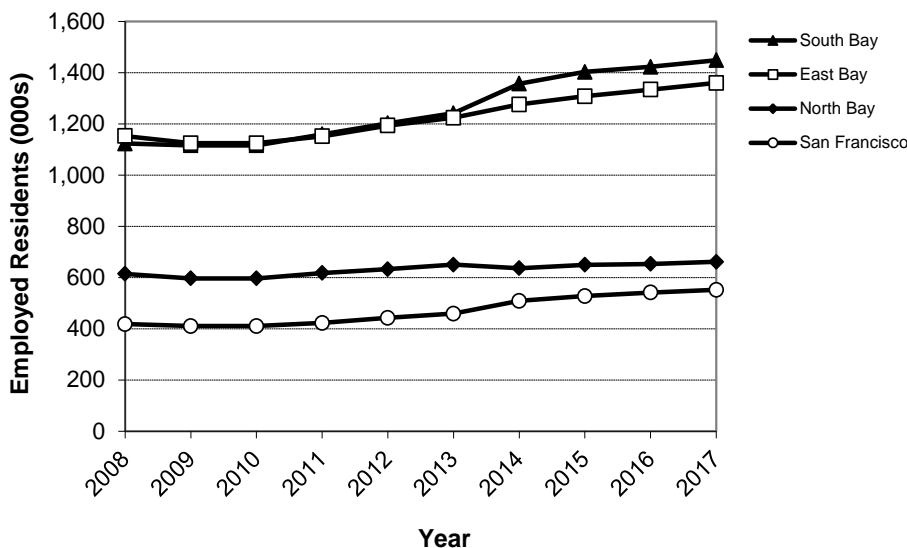
Sub-Region	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	614.7	596.8	596.8	617.9	633.1	650.5	636.7	650.1	653.5	661.8
East Bay	1,153.0	1,124.4	1,124.4	1,151.6	1,193.5	1,224.1	1,275.7	1,308.1	1,334.2	1,360.1
South Bay	1,123.6	1,116.4	1,116.4	1,159.5	1,202.2	1,241.9	1,357.0	1,403.1	1,423.1	1,448.8
San Francisco	418.4	410.7	410.7	422.7	442.8	459.3	509.1	528.1	541.6	552.3
<b>TOTAL</b>	<b>3,309.7</b>	<b>3,248.3</b>	<b>3,248.3</b>	<b>3,351.7</b>	<b>3,471.6</b>	<b>3,575.8</b>	<b>3,778.5</b>	<b>3,889.4</b>	<b>3,952.4</b>	<b>4,023.0</b>

**Annual Percentage Distribution**

Sub-Region	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	18.6	18.4	18.4	18.4	18.2	18.2	16.9	16.7	16.5	16.5
East Bay	34.8	34.6	34.6	34.4	34.4	34.2	33.8	33.6	33.8	33.8
South Bay	33.9	34.4	34.4	34.6	34.6	34.7	35.9	36.1	36.0	36.0
San Francisco	12.6	12.6	12.6	12.6	12.8	12.8	13.5	13.6	13.7	13.7
<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**

Sub-Region	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
North Bay	-2.9	0.0	3.5	2.5	2.7	-2.1	2.1	0.5	1.3
East Bay	-2.5	0.0	2.4	3.6	2.6	4.2	2.5	2.0	1.9
South Bay	-0.6	0.0	3.9	3.7	3.3	9.3	3.4	1.4	1.8
San Francisco	-1.8	0.0	2.9	4.8	3.7	10.8	3.7	2.6	2.0
<b>TOTAL</b>	<b>-1.9</b>	<b>0.0</b>	<b>3.2</b>	<b>3.6</b>	<b>3.0</b>	<b>5.7</b>	<b>2.9</b>	<b>1.6</b>	<b>1.8</b>



**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: City and County of San Francisco

**Source:**  
CA Employment Development Department, annual averages (not seasonally adjusted).

**Table 2.1.4****BAY AREA UNEMPLOYMENT BY SUB-REGION, 2008–2017**

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 on the following page.

**Unemployment by Sub-Region (000s)**

<i>Sub-Region</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	39.9	65.3	69.8	66.6	59.0	47.9	39.6	32.7	29.4	25.4
East Bay	80.1	135.6	140.2	133.4	118.2	97.8	81.2	66.6	60.1	52.3
South Bay	70.9	128.4	122.2	117.0	103.1	85.0	69.9	57.3	52.0	45.5
San Francisco	23.7	41.5	43.2	39.8	34.9	27.9	23.3	19.9	18.2	16.5
<b>TOTAL</b>	<b>214.6</b>	<b>370.8</b>	<b>375.4</b>	<b>356.8</b>	<b>315.2</b>	<b>258.6</b>	<b>214.0</b>	<b>176.5</b>	<b>159.7</b>	<b>139.7</b>

**Annual Percentage Distribution**

<i>Sub-Region</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	18.6	17.6	18.6	18.7	18.7	18.5	18.5	18.5	18.4	18.2
East Bay	37.3	36.6	37.3	37.4	37.5	37.8	37.9	37.7	37.6	37.4
South Bay	33.0	34.6	32.6	32.8	32.7	32.9	32.7	32.5	32.6	32.6
San Francisco	11.0	11.2	11.5	11.2	11.1	10.8	10.9	11.3	11.4	11.8
<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**

<i>Sub-Region</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
North Bay	63.7	6.9	-4.6	-11.4	-18.8	-17.3	-17.4	-10.1	-13.6
East Bay	69.3	3.4	-4.9	-11.4	-17.3	-17.0	-18.0	-9.8	-13.0
South Bay	81.1	-4.8	-4.3	-11.9	-17.6	-17.8	-18.0	-9.2	-12.5
San Francisco	75.1	4.1	-7.9	-12.3	-20.1	-16.5	-14.6	-8.5	-9.3
<b>TOTAL</b>	<b>72.8</b>	<b>1.2</b>	<b>-5.0</b>	<b>-11.7</b>	<b>-18.0</b>	<b>-17.2</b>	<b>-17.5</b>	<b>-9.5</b>	<b>-12.5</b>

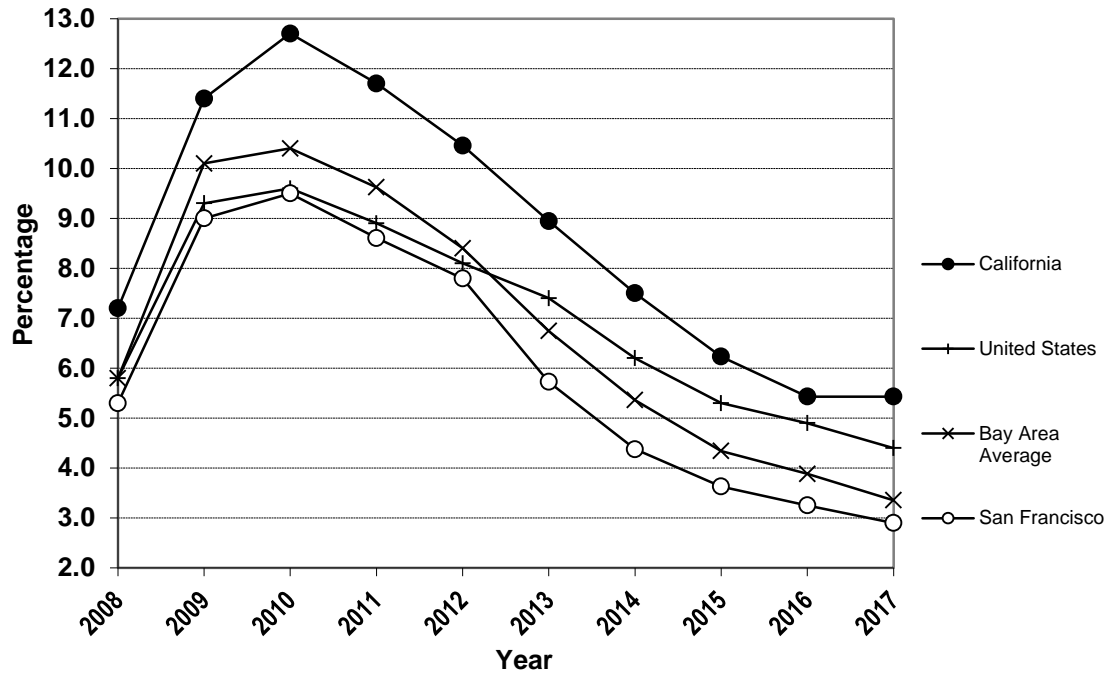
**Average Annual Rate**

<i>Sub-Region</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	5.8	9.6	10.4	9.7	8.5	6.9	5.9	4.8	4.3	3.7
East Bay	6.2	10.5	11.1	10.4	9.0	7.4	6.0	4.8	4.3	3.7
South Bay	5.6	10.3	9.9	9.2	7.9	6.4	4.9	3.9	3.5	3.0
San Francisco	5.3	9.0	9.5	8.6	7.8	5.7	4.4	3.6	3.3	2.9
<b>Average</b>	<b>5.8</b>	<b>10.1</b>	<b>10.4</b>	<b>9.6</b>	<b>8.4</b>	<b>6.7</b>	<b>5.4</b>	<b>4.3</b>	<b>3.9</b>	<b>3.4</b>

**Average Annual Rate**

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
California	7.2	11.4	12.7	11.7	10.5	8.9	7.5	6.2	5.4	5.4
United States	5.8	9.3	9.6	8.9	8.1	7.4	6.2	5.3	4.9	4.4

**Figure 2.1.4**  
**BAY AREA UNEMPLOYMENT RATE BY SUB-REGION, 2008–2017**



**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: City and County of San Francisco

**Sources:**

- CA Employment Development Department, annual averages (not seasonally adjusted).
- US Bureau of Labor Statistics; [http://www.bls.gov/cps/prev\\_yrs.htm](http://www.bls.gov/cps/prev_yrs.htm)

**Table 2.2.1 BAY AREA EMPLOYMENT BY INDUSTRY GROUP, 2008–2017**

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)**

<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Farm	20.2	20.1	19.0	18.7	18.9	20.0	20.2	20.1	20.5	20.3
Natural Resources, Mining & Construction	179.6	143.7	131.5	110.3	116.1	154.4	163.1	179.1	188.9	195.4
Manufacturing	344.9	313.9	305.4	310.5	312.1	310.9	320.9	327.6	334.9	346.4
Trade, Transportation & Utilities	563.5	518.6	509.2	513.3	527.8	547.5	562.1	575.9	588.1	593.4
Information	114.5	110.7	110.8	117.2	122.4	136.2	148.5	163.8	178.2	194.9
Financial Activities	193.5	179.3	170.4	170.4	175.0	173.9	177.2	179.9	193.5	194.3
Professional & Business Services	588.6	542.6	546.5	560.9	605.8	642.1	682.2	714.9	733.8	743.7
Educational & Health Services	391.4	394.5	409.7	415.0	425.2	520.7	540.2	551.1	567.5	587.9
Leisure & Hospitality	335.7	322.0	323.1	333.1	352.2	374.0	391.4	403.9	417.5	426.7
Other Services	112.5	107.2	108.8	110.3	112.9	117.0	121.5	123.4	126.0	128.7
Government	477.7	472.5	454.5	449.8	447.7	450.2	458.3	465.3	476.3	480.9
<b>TOTAL</b>	<b>3,322.1</b>	<b>3,125.1</b>	<b>3,088.9</b>	<b>3,109.5</b>	<b>3,216.1</b>	<b>3,446.9</b>	<b>3,585.6</b>	<b>3,705.0</b>	<b>3,825.2</b>	<b>3,912.6</b>

**Annual Percentage Distribution**

<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Farm	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.5	0.5	0.5
Natural Resources, Mining & Construction	5.4	4.6	4.3	3.5	3.6	4.5	4.5	4.8	4.9	5.0
Manufacturing	10.4	10.0	9.9	10.0	9.7	9.0	8.9	8.8	8.8	8.9
Trade, Transportation & Utilities	17.0	16.6	16.5	16.5	16.4	15.9	15.7	15.5	15.4	15.2
Information	3.4	3.5	3.6	3.8	3.8	4.0	4.1	4.4	4.7	5.0
Financial Activities	5.8	5.7	5.5	5.5	5.4	5.0	4.9	4.9	5.1	5.0
Professional & Business Services	17.7	17.4	17.7	18.0	18.8	18.6	19.0	19.3	19.2	19.0
Educational & Health Services	11.8	12.6	13.3	13.3	13.2	15.1	15.1	14.9	14.8	15.0
Leisure & Hospitality	10.1	10.3	10.5	10.7	11.0	10.9	10.9	10.9	10.9	10.9
Other Services	3.4	3.4	3.5	3.5	3.5	3.4	3.4	3.3	3.3	3.3
Government	14.4	15.1	14.7	14.5	13.9	13.1	12.8	12.6	12.5	12.3
<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**

<i>Industry Group</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Farm	-0.5	-5.5	-1.6	1.1	5.8	1.0	-0.5	1.8	-0.8
Natural Resources, Mining & Construction	-20.0	-8.5	-16.1	5.3	33.0	5.6	9.8	5.5	3.4
Manufacturing	-9.0	-2.7	1.7	0.5	-0.4	3.2	2.1	2.2	3.4
Trade, Transportation & Utilities	-8.0	-1.8	0.8	2.8	3.7	2.7	2.5	2.1	0.9
Information	-3.3	0.1	5.8	4.4	11.3	9.0	10.3	8.8	9.3
Financial Activities	-7.3	-5.0	0.0	2.7	-0.6	1.9	1.5	7.6	0.4
Professional & Business Services	-7.8	0.7	2.6	8.0	6.0	6.2	4.8	2.6	1.3
Educational & Health Services	0.8	3.9	1.3	2.5	22.5	3.7	2.0	3.0	3.6
Leisure & Hospitality	-4.1	0.3	3.1	5.7	6.2	4.7	3.2	3.4	2.2
Other Services	-4.7	1.5	1.4	2.4	3.6	3.8	1.6	2.1	2.1
Government	-1.1	-3.8	-1.0	-0.5	0.6	1.8	1.5	2.4	1.0
<b>TOTAL</b>	<b>-5.9</b>	<b>-1.2</b>	<b>0.7</b>	<b>3.4</b>	<b>7.2</b>	<b>4.0</b>	<b>3.3</b>	<b>3.2</b>	<b>2.3</b>

**Source:** California Employment Development Department, Industry Employment & Labor Force - by Annual Average; March Benchmark.

**Table 2.2.2****BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2008–2017 – NUMBER OF JOBS**

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

**Total Number of Jobs (000s)**

<i>Sub-Region</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	497.8	467.3	459.2	453.8	461.9	497.0	514.2	522.9	532.5	541.5
East Bay	1,031.1	968.0	949.8	950.6	978.7	1,035.4	1,066.3	1,096.5	1,136.1	1,164.9
South Bay	1,243.8	1,165.5	1,158.2	1,178.6	1,217.6	1,305.9	1,365.6	1,416.6	1,453.1	1,487.3
San Francisco	549.4	524.3	521.7	526.5	557.9	608.6	639.5	669.0	703.6	718.9
Regional Total	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1	3,446.9	3,585.6	3,705.0	3,825.2	3,912.6

**Farm**

North Bay	12.8	12.9	12.0	12.0	12.4	13.3	13.5	13.3	13.3	13.5
East Bay	1.4	1.5	1.5	1.5	1.4	1.5	1.4	1.2	1.3	1.4
South Bay	5.7	5.4	5.3	5.0	4.9	5.0	5.1	5.4	5.7	5.2
San Francisco	0.3	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.1	0.2
Regional Total	20.2	20.1	19.0	18.7	18.9	20.0	20.2	20.1	20.5	20.3

**Natural Resources, Mining & Construction**

North Bay	34.5	26.8	24.6	16.9	17.0	27.7	29.2	31.9	34.1	35.9
East Bay	65.8	54.7	48.7	48.5	50.6	57.3	59.5	63.3	68.4	71.5
South Bay	60.9	46.9	44.1	30.8	34.4	53.7	57.6	65.4	66.0	67.4
San Francisco	18.4	15.3	14.1	14.1	14.8	15.7	16.8	18.5	20.4	20.6
Regional Total	179.6	143.7	131.5	110.3	116.8	154.4	163.1	179.1	188.9	195.4

**Manufacturing**

North Bay	45.5	42.0	41.3	41.8	42.9	44.1	47.0	45.7	46.1	48.2
East Bay	93.3	82.5	78.6	79.1	80.3	78.6	81.9	86.7	89.9	95.6
South Bay	195.3	180.1	176.8	181.0	179.6	179.0	182.0	184.9	186.7	189.7
San Francisco	10.8	9.3	8.7	8.6	8.6	8.6	8.6	8.6	8.6	8.6
Regional Total	344.9	313.9	305.4	310.5	311.4	310.3	319.5	325.9	331.3	342.1

**Trade, Transportation & Utilities**

North Bay	89.4	82.3	82.2	83.4	85.4	87.8	90.6	92.0	92.7	92.9
East Bay	195.3	179.0	173.8	174.0	179.0	185.4	191.2	198.9	202.8	205.5
South Bay	210.9	193.7	191.2	193.5	198.4	204.9	208.7	210.1	213.7	212.2
San Francisco	67.9	63.6	62.0	62.4	65.0	69.4	71.6	74.9	78.8	82.8
Regional Total	563.5	518.6	509.2	513.3	527.8	547.5	562.1	575.9	588.1	593.4

**Information**

North Bay	7.4	7.0	6.6	6.8	7.1	7.2	7.0	6.9	6.8	6.9
East Bay	27.8	25.1	23.8	22.7	22.0	21.5	21.1	22.4	26.4	26.6
South Bay	60.2	59.1	61.2	66.8	69.6	82.2	92.5	102.8	106.1	119.9
San Francisco	19.1	19.5	19.2	20.9	23.7	25.3	27.9	31.7	39.0	41.5
Regional Total	114.5	110.7	110.8	117.2	122.4	136.2	148.5	163.8	178.2	194.9

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**Financial Activities**

<i>Sub-Region</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	24.3	22.8	21.4	22.1	21.8	22.1	21.5	21.7	22.4	21.8
East Bay	56.7	52.6	48.4	47.2	48.4	49.5	49.3	49.6	57.3	57.7
South Bay	54.8	50.5	49.0	50.8	53.3	53.4	55.5	56.6	57.7	58.5
San Francisco	57.7	53.4	51.6	50.3	51.5	48.9	50.9	52.0	56.1	56.3
Regional Total	193.5	179.3	170.4	170.4	175.0	173.9	177.2	179.9	193.5	194.3

**Professional & Business Services**

North Bay	59.9	53.9	56.7	53.1	51.2	53.9	54.5	56.0	56.6	56.2
East Bay	161.4	148.5	148.1	154.3	165.0	172.3	179.9	182.9	180.8	184.9
South Bay	242.2	221.9	221.7	232.8	250.7	261.2	278.0	291.4	305.8	307.7
San Francisco	125.1	118.3	120.0	120.7	138.9	154.7	169.8	184.6	190.6	194.9
Regional Total	588.6	542.6	546.5	560.9	605.8	642.1	682.2	714.9	733.8	743.7

**Educational & Health Services**

North Bay	66.2	66.4	67.4	67.4	70.0	81.7	85.6	87.3	89.2	92.1
East Bay	127.7	130.0	139.7	137.5	141.1	170.9	175.1	178.4	184.9	192.1
South Bay	139.4	140.2	144.0	151.1	153.0	183.1	192.5	199.7	205.7	214.6
San Francisco	58.1	57.9	58.6	59.0	61.1	85.0	87.0	85.7	87.7	89.1
Regional Total	391.4	394.5	409.7	415.0	425.2	520.7	540.2	551.1	567.5	587.9

**Leisure & Hospitality**

North Bay	57.0	54.6	54.2	56.3	59.8	62.7	66.5	67.3	68.6	70.4
East Bay	89.1	85.2	85.6	87.3	92.0	98.0	103.1	106.3	111.4	114.9
South Bay	111.0	106.5	106.8	110.6	117.7	125.6	131.7	137.0	140.2	144.6
San Francisco	78.6	75.7	76.5	78.9	82.7	87.7	90.1	93.3	97.3	96.8
Regional Total	335.7	322.0	323.1	333.1	352.2	374.0	391.4	403.9	417.5	426.7

**Other Services**

North Bay	17.4	16.3	16.5	16.3	17.2	17.8	17.9	18.4	19.0	19.6
East Bay	36.0	34.3	34.5	36.0	36.1	37.0	37.7	38.1	39.2	40.1
South Bay	36.8	35.3	36.3	36.1	37.1	38.3	39.9	40.7	40.9	41.7
San Francisco	22.3	21.3	21.5	21.9	22.5	23.9	26.0	26.2	26.9	27.3
Regional Total	112.5	107.2	108.8	110.3	112.9	117.0	121.5	123.4	126.0	128.7

**Government**

North Bay	83.4	82.3	76.3	77.7	77.1	78.7	80.9	82.4	83.6	84.0
East Bay	176.6	174.6	167.1	162.5	162.8	163.4	166.1	168.7	173.8	174.6
South Bay	126.6	125.9	121.8	120.1	118.9	119.5	122.1	122.6	124.5	125.8
San Francisco	91.1	89.7	89.3	89.5	88.9	88.6	89.2	91.6	94.3	96.5
Regional Total	477.7	472.5	454.5	449.8	447.7	450.2	458.3	465.3	476.2	480.9

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average.



**Table 2.2.3****BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2008–2017 – ANNUAL PERCENTAGE DISTRIBUTION**

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

**Total Annual Percentage Distribution**

<i>Sub-Region</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	15.0	15.0	14.9	14.6	14.4	14.4	14.3	14.1	13.9	13.8
East Bay	31.0	31.0	30.7	30.6	30.4	30.0	29.7	29.6	29.7	29.8
South Bay	37.4	37.3	37.5	37.9	37.9	37.9	38.1	38.2	38.0	38.0
San Francisco	16.5	16.8	16.9	16.9	17.3	17.7	17.8	18.1	18.4	18.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Farm**

North Bay	63.4	64.2	63.2	64.2	65.6	66.5	66.8	66.2	65.2	66.5
East Bay	6.9	7.5	7.9	8.0	7.4	7.5	6.9	6.0	6.4	6.9
South Bay	28.2	26.9	27.9	26.7	25.9	25.0	25.2	26.9	27.9	25.6
San Francisco	1.5	1.5	1.1	1.1	1.1	1.0	1.0	1.0	0.6	1.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Natural Resources, Mining & Construction**

North Bay	19.2	18.6	18.7	15.3	14.6	17.9	17.9	17.8	18.1	18.4
East Bay	36.6	38.1	37.0	44.0	43.3	37.1	36.5	35.3	36.2	36.6
South Bay	33.9	32.6	33.5	27.9	29.5	34.8	35.3	36.5	34.9	34.5
San Francisco <sup>1</sup>	10.2	10.6	10.7	12.8	12.7	10.2	10.3	10.3	10.8	10.5
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Manufacturing**

North Bay	13.2	13.4	13.5	13.5	13.8	14.2	14.7	14.0	13.9	14.1
East Bay	27.1	26.3	25.7	25.5	25.8	25.3	25.6	26.6	27.1	27.9
South Bay	56.6	57.4	57.9	58.3	57.7	57.7	57.0	56.7	56.4	55.5
San Francisco	3.1	3.0	2.8	2.8	2.8	2.8	2.7	2.6	2.6	2.5
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Trade, Transportation & Utilities**

North Bay	15.9	15.9	16.1	16.2	16.2	16.0	16.1	16.0	15.8	15.7
East Bay	34.7	34.5	34.1	33.9	33.9	33.9	34.0	34.5	34.5	34.6
South Bay	37.4	37.4	37.5	37.7	37.6	37.4	37.1	36.5	36.3	35.8
San Francisco	12.0	12.3	12.2	12.2	12.3	12.7	12.7	13.0	13.4	14.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Information**

North Bay	6.5	6.3	6.0	5.8	5.8	5.3	4.7	4.2	3.8	3.5
East Bay	24.3	22.7	21.5	19.4	18.0	15.8	14.2	13.7	14.8	13.6
South Bay	52.6	53.4	55.2	57.0	56.9	60.4	62.3	62.8	59.5	61.5
San Francisco	16.7	17.6	17.3	17.8	19.4	18.6	18.8	19.4	21.9	21.3
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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**Financial Activities**

<i>Sub-Region</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
North Bay	12.6	12.7	12.6	13.0	12.5	12.7	12.1	12.1	11.6	11.2
East Bay	29.3	29.3	28.4	27.7	27.7	28.5	27.8	27.6	29.6	29.7
South Bay	28.3	28.2	28.8	29.8	30.5	30.7	31.3	31.5	29.8	30.1
San Francisco	29.8	29.8	30.3	29.5	29.4	28.1	28.7	28.9	29.0	29.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Professional & Business Services**

North Bay	10.2	9.9	10.4	9.5	8.5	8.4	8.0	7.8	7.7	7.6
East Bay	27.4	27.4	27.1	27.5	27.2	26.8	26.4	25.6	24.6	24.9
South Bay	41.1	40.9	40.6	41.5	41.4	40.7	40.8	40.8	41.7	41.4
San Francisco	21.3	21.8	22.0	21.5	22.9	24.1	24.9	25.8	26.0	26.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Educational & Health Services**

North Bay	16.9	16.8	16.5	16.2	16.5	15.7	15.8	15.8	15.7	15.7
East Bay	32.6	33.0	34.1	33.1	33.2	32.8	32.4	32.4	32.6	32.7
South Bay	35.6	35.5	35.1	36.4	36.0	35.2	35.6	36.2	36.2	36.5
San Francisco	14.8	14.7	14.3	14.2	14.4	16.3	16.1	15.6	15.5	15.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Leisure & Hospitality**

North Bay	17.0	17.0	16.8	16.9	17.0	16.8	17.0	16.7	16.4	16.5
East Bay	26.5	26.5	26.5	26.2	26.1	26.2	26.3	26.3	26.7	26.9
South Bay	33.1	33.1	33.1	33.2	33.4	33.6	33.6	33.9	33.6	33.9
San Francisco	23.4	23.5	23.7	23.7	23.5	23.4	23.0	23.1	23.3	22.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Other Services**

North Bay	15.5	15.2	15.2	14.8	15.2	15.2	14.7	14.9	15.1	15.2
East Bay	32.0	32.0	31.7	32.6	32.0	31.6	31.0	30.9	31.1	31.2
South Bay	32.7	32.9	33.4	32.7	32.9	32.7	32.8	33.0	32.5	32.4
San Francisco	19.8	19.9	19.8	19.9	19.9	20.4	21.4	21.2	21.3	21.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Government**

North Bay	17.5	17.4	16.8	17.3	17.2	17.5	17.7	17.7	17.6	17.5
East Bay	37.0	37.0	36.8	36.1	36.4	36.3	36.2	36.3	36.5	36.3
South Bay	26.5	26.6	26.8	26.7	26.6	26.5	26.6	26.3	26.1	26.2
San Francisco	19.1	19.0	19.6	19.9	19.9	19.7	19.5	19.7	19.8	20.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average.

**Table 2.2.4****BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 2008–2017 – PERCENTAGE CHANGE**

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

**Total Percentage Change**

<i>Sub-Region</i>	<i>2008-09</i>	<i>2009-10</i>	<i>2010-11</i>	<i>2011-12</i>	<i>2012-13</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>
North Bay	-6.1	-1.7	-1.2	1.8	7.6	3.5	1.7	1.8	1.7
East Bay	-6.1	-1.9	0.1	3.0	5.8	3.0	2.8	3.6	2.5
South Bay	-6.3	-0.6	1.8	3.3	7.3	4.6	3.7	2.6	2.4
San Francisco	-4.6	-0.5	0.9	6.0	9.1	5.1	4.6	5.2	2.2
Regional Total	-5.9	-1.2	0.7	3.4	7.2	4.0	3.3	3.2	2.3

**Farm**

North Bay	0.8	-7.0	0.0	3.3	7.3	1.5	-1.5	0.3	1.3
East Bay	7.1	0.0	0.0	-6.7	7.1	-6.7	-14.3	8.3	7.7
South Bay	-5.3	-1.9	-5.7	-2.0	2.0	2.0	5.9	5.6	-8.8
San Francisco	0.0	-33.3	0.0	0.0	0.0	0.0	0.0	-37.5	60.0
Regional Total	-0.5	-5.5	-1.6	1.1	5.8	1.0	-0.5	1.8	-0.8

**Natural Resources, Mining & Construction**

North Bay	-22.3	-8.2	-31.3	0.6	62.9	5.4	9.2	7.0	5.2
East Bay	-16.9	-11.0	-0.4	4.3	13.2	3.8	6.4	8.0	4.5
South Bay	-23.0	-6.0	-30.2	11.7	56.1	7.3	13.5	0.9	2.1
San Francisco	-16.8	-7.8	0.0	5.0	6.1	7.0	10.1	10.4	0.9
Regional Total	-20.0	-8.5	-16.1	5.9	32.2	5.6	9.8	5.5	3.4

**Manufacturing**

North Bay	-7.7	-1.7	1.2	2.6	2.8	6.6	-2.8	0.9	4.6
East Bay	-11.6	-4.7	0.6	1.5	-2.1	4.2	5.9	3.7	6.4
South Bay	-7.8	-1.8	2.4	-0.8	-0.3	1.7	1.6	1.0	1.6
San Francisco <sup>1</sup>	-13.9	-6.5	-1.1	0.0	0.0	0.0	0.0	0.0	0.0
Regional Total	-9.0	-2.7	1.7	0.3	-0.4	3.0	2.0	1.7	3.3

**Trade, Transportation & Utilities**

North Bay	-7.9	-0.1	1.5	2.4	2.8	3.2	1.5	0.8	0.2
East Bay	-8.3	-2.9	0.1	2.9	3.6	3.1	4.0	1.9	1.4
South Bay	-8.2	-1.3	1.2	2.5	3.3	1.9	0.7	1.7	-0.7
San Francisco	-6.3	-2.5	0.6	4.2	6.8	3.2	4.6	5.3	5.0
Regional Total	-8.0	-1.8	0.8	2.8	3.7	2.7	2.5	2.1	0.9

**Information**

North Bay	-5.4	-5.7	3.0	4.4	1.4	-2.8	-1.4	-1.9	2.0
East Bay	-9.7	-5.2	-4.6	-3.1	-2.3	-1.9	6.2	17.6	0.9
South Bay	-1.8	3.6	9.2	4.2	18.1	12.5	11.1	3.2	13.0
San Francisco	2.1	-1.5	8.9	13.4	6.8	10.3	13.6	23.1	6.4
Regional Total	-3.3	0.1	5.8	4.4	11.3	9.0	10.3	8.8	9.3

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**Financial Activities**

<i>Sub-Region</i>	<i>2008-09</i>	<i>2009-10</i>	<i>2010-11</i>	<i>2011-12</i>	<i>2012-13</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>
North Bay	-6.2	-6.1	3.3	-1.4	1.4	-2.7	0.9	3.1	-2.6
East Bay	-7.2	-8.0	-2.5	2.5	2.3	-0.4	0.6	15.5	0.7
South Bay	-7.8	-3.0	3.7	4.9	0.2	3.9	2.0	2.0	1.3
San Francisco	-7.5	-3.4	-2.5	2.4	-5.0	4.1	2.2	8.0	0.3
Regional Total	-7.3	-5.0	0.0	2.7	-0.6	1.9	1.5	7.6	0.4

**Professional & Business Services**

North Bay	-10.0	5.2	-6.3	-3.6	5.3	1.1	2.8	1.0	-0.7
East Bay	-8.0	-0.3	4.2	6.9	4.4	4.4	1.7	-1.1	2.2
South Bay	-8.4	-0.1	5.0	7.7	4.2	6.4	4.8	4.9	0.6
San Francisco	-5.4	1.4	0.6	15.1	11.4	9.8	8.7	3.2	2.3
Regional Total	-7.8	0.7	2.6	8.0	6.0	6.2	4.8	2.6	1.3

**Educational & Health Services**

North Bay	0.3	1.5	0.0	3.9	16.7	4.8	2.0	2.2	3.3
East Bay	1.8	7.5	-1.6	2.6	21.1	2.5	1.9	3.6	3.9
South Bay	0.6	2.7	4.9	1.3	19.7	5.1	3.7	3.0	4.3
San Francisco	-0.3	1.2	0.7	3.6	39.1	2.4	-1.5	2.4	1.6
Regional Total	0.8	3.9	1.3	2.5	22.5	3.7	2.0	3.0	3.6

**Leisure & Hospitality**

North Bay	-4.2	-0.7	3.9	6.2	4.8	6.1	1.2	1.9	2.6
East Bay	-4.4	0.5	2.0	5.4	6.5	5.2	3.1	4.8	3.1
South Bay	-4.1	0.3	3.6	6.4	6.7	4.9	4.0	2.3	3.1
San Francisco	-3.7	1.1	3.1	4.8	6.0	2.7	3.6	4.3	-0.5
Regional Total	-4.1	0.3	3.1	5.7	6.2	4.7	3.2	3.4	2.2

**Other Services**

North Bay	-6.3	1.2	-1.2	5.5	3.5	0.6	2.8	3.3	3.2
East Bay	-4.7	0.6	4.3	0.3	2.5	1.9	1.1	2.9	2.3
South Bay	-4.1	2.8	-0.6	2.8	3.2	4.2	2.0	0.5	2.0
San Francisco	-4.5	0.9	1.9	2.7	6.2	8.8	0.8	2.7	1.5
Regional Total	-4.7	1.5	1.4	2.4	3.6	3.8	1.6	2.1	2.1

**Government**

North Bay	-1.3	-7.3	1.8	-0.8	2.1	2.8	1.9	1.5	0.5
East Bay	-1.1	-4.3	-2.8	0.2	0.4	1.7	1.6	3.0	0.5
South Bay	-0.6	-3.3	-1.4	-1.0	0.5	2.2	0.4	1.5	1.0
San Francisco	-1.5	-0.4	0.2	-0.7	-0.3	0.7	2.7	2.9	2.3
Regional Total	-1.1	-3.8	-1.0	-0.5	0.6	1.8	1.5	2.3	1.0

Source: California Employment Development Department, Industry Employment & Labor Force - by Annual Average.







# 3.0 Employment

This chapter provides information about the employment trends in San Francisco over the last decade. 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, grounds keeper/caretakers, and other household maintenance workers.

Employment data are presented by the major economy sectors under each type of land use category. Up until 2000, the C&I organized economic sectors according to the Standard Industrial Classification system (SIC). In 2001, these economic sectors were reorganized according to North American Industry Classification system (NAICS). The NAICS industry classification system is discussed in Section 1.2 – Data Formats. *Tables 1.1 and 1.2* show the NAICS economic sectors.

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. Moreover, the EDD wage and salary employment data do not include self-employed persons, of which there were approximately 61,000 in 2006 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). Beginning in 2009, numbers are also available for Private Households (Pvt HH). 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 C&I Inventories published before 2001. Public administration jobs have been included in different land use categories in previous C&I Inventories.

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 C&I Inventories 2000 and earlier, public administration jobs were separated from Office, PDR, and CIE land use categories.

*Table 3.1* shows employment data by Land Use Category from 2008 to 2017. *Tables 3.2.1* through *3.2.4* show employment data by Industry Group within each Land Use Category in San Francisco from 2008 to 2017. *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 2017. It also shows Private Household employment as its own land use category. This category represents home-based business establishments and organizations, particularly caregivers. These employees were previously classified under the Cultural/Institutional/Educational land use category. In 2012, Treasure Island was added as a new C&I District.

**Table 3.1 (next page)**

**SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2008–2017**

This table contains the number of jobs in each of the five major non-residential land use categories in San Francisco. Employment for an additional land use category, Private Households (Pvt HH), was added in 2009. These jobs were previously counted under CIE. Data is presented from 2009-2014 (see Section 1.2 - Data Formats for a description of land use categories and the NAICS economic sectors). Also included is the percentage distribution in any given year and the annual change within each land use category. The data include graphs below in Figures 3.1.1 (a snapshot of job distribution this year) and 3.1.1 (a look at ten-year trends).

**Notes:**

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural, Institutional, or Educational
- Pvt HH = Private Household employment
- \*Prior to 2008, Households were counted as part of CIE.
- The 12% decline in CIE employment between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- From 2003-2006, 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

**Annual Average Number of Jobs**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	221,250	211,885	211,050	218,837	231,908	244,262	260,976	279,911	293,320	298,644
Retail	103,443	98,278	98,139	100,598	106,305	111,754	117,654	122,860	125,333	126,110
PDR	84,710	76,727	72,967	72,466	75,637	78,234	81,519	85,589	94,138	98,853
Hotel	19,527	17,828	17,568	17,795	17,400	18,136	16,646	17,282	16,520	16,142
CIE	141,848	124,831	126,208	129,015	132,851	156,157	157,988	161,801	167,069	168,810
Pvt HH	-	19,443	19,819	20,327	22,156	4,113	5,597	7,015	6,853	6,138
<b>TOTAL</b>	<b>570,778</b>	<b>548,992</b>	<b>545,751</b>	<b>559,038</b>	<b>586,257</b>	<b>612,656</b>	<b>640,380</b>	<b>674,458</b>	<b>703,233</b>	<b>714,697</b>

**Annual Percentage Distribution**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	38.8	38.6	38.7	39.1	39.6	39.9	40.8	41.5	41.7	41.8
Retail	18.1	17.9	18.0	18.0	18.1	18.2	18.4	18.2	17.8	17.6
PDR	14.8	14.0	13.4	13.0	12.9	12.8	12.7	12.7	13.4	13.8
Hotel	3.4	3.2	3.2	3.2	3.0	3.0	2.6	2.6	2.3	2.3
CIE	24.9	22.7	23.1	23.1	22.7	25.5	24.7	24.0	23.8	23.6
Pvt HH	-	-	3.6	3.6	3.8	0.7	0.9	1.0	1.0	0.9
<b>TOTAL</b>	<b>100.0</b>	<b>96.5</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>

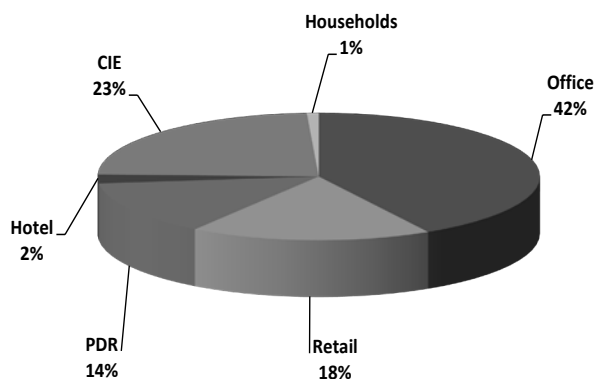
**Percentage Change**

Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-4.2	-0.4	3.7	6.0	5.3	6.8	7.3	4.8	1.8
Retail	-5.0	-0.1	2.5	5.7	5.1	5.3	4.4	2.0	0.6
PDR	-9.4	-4.9	-0.7	4.4	3.4	4.2	5.0	10.0	5.0
Hotel	-8.7	-1.5	1.3	-2.2	4.2	-8.2	3.8	-4.4	-2.3
CIE	-12.0	1.1	2.2	3.0	17.5	1.2	2.4	3.3	1.0
Pvt HH	-	-	2.6	9.0	-81.4	36.1	25.3	-2.3	-10.4
<b>TOTAL</b>	<b>-3.8</b>	<b>-0.6</b>	<b>2.4</b>	<b>4.9</b>	<b>4.5</b>	<b>4.5</b>	<b>5.3</b>	<b>4.3</b>	<b>1.6</b>

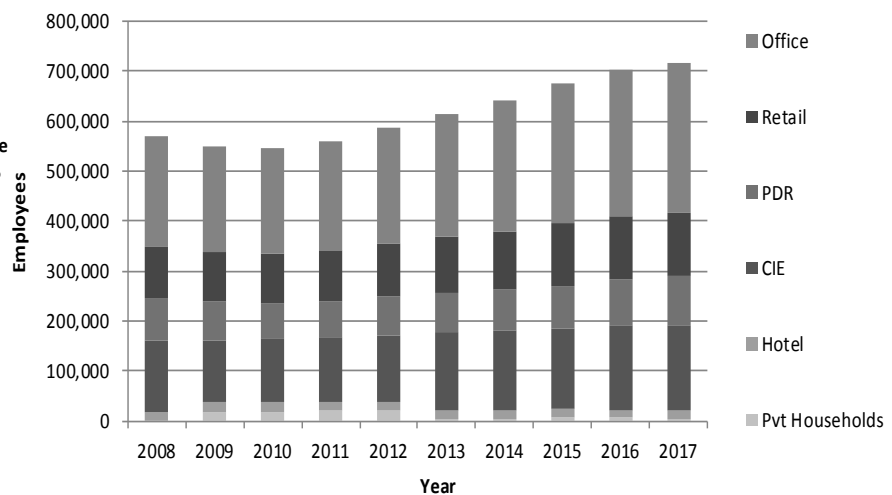
**Note:**

• Starting in 2013, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

**Figure 3.1.1**  
SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2017



**Figure 3.1.2**  
SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2008–2017





**Table & Figure 3.2.1**  
**OFFICE EMPLOYMENT BY INDUSTRY GROUP, 2008–2017**

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**

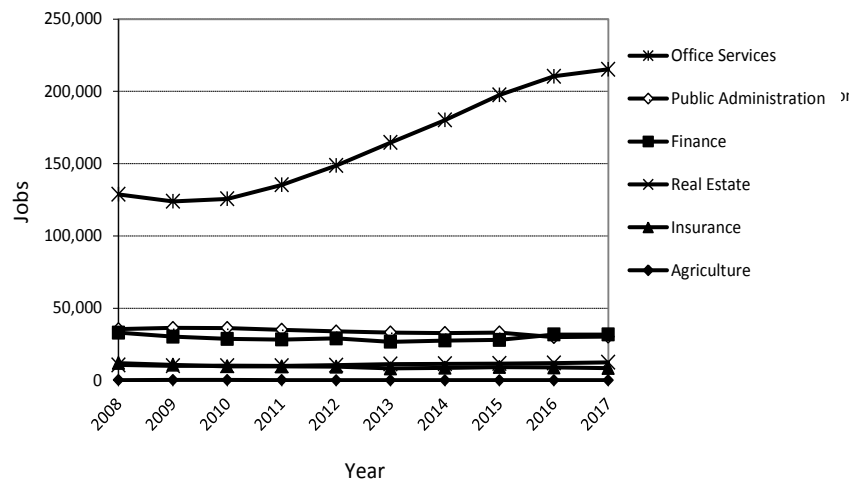
Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Agriculture	251	330	357	272	184	159	172	166	163	198
Finance	33,033	30,313	28,742	28,316	29,048	26,736	27,621	28,040	31,777	31,769
Insurance	12,003	10,799	9,796	9,729	9,512	8,306	8,734	9,296	8,966	8,527
Real Estate	10,739	10,146	10,206	10,126	10,554	11,292	11,507	11,695	12,053	12,588
Office Services	128,754	123,917	125,641	135,363	148,682	164,602	180,174	197,553	210,389	215,301
Public Administration	35,458	36,380	36,308	35,032	33,928	33,166	32,768	33,161	29,972	30,261
<b>TOTAL</b>	<b>220,237</b>	<b>211,885</b>	<b>211,050</b>	<b>218,838</b>	<b>231,908</b>	<b>244,261</b>	<b>260,976</b>	<b>279,911</b>	<b>293,320</b>	<b>298,644</b>

**Annual Percentage Distribution**

Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Agriculture	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Finance	15.0	14.3	13.6	12.9	12.5	10.9	10.6	10.0	10.8	10.6
Insurance	5.5	5.1	4.6	4.4	4.1	3.4	3.3	3.3	3.1	2.9
Real Estate	4.9	4.8	4.8	4.6	4.6	4.6	4.4	4.2	4.1	4.2
Office Services	58.5	58.5	59.5	61.9	64.1	67.4	69.0	70.6	71.7	72.1
Public Administration	16.1	17.2	17.2	16.0	14.6	13.6	12.6	11.8	10.2	10.1
<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	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Agriculture	31.7	8.2	-23.8	-32.4	-13.6	8.2	-3.5	-1.8	21.5
Finance	-8.2	-5.2	-1.5	2.6	-8.0	3.3	1.5	13.3	0.0
Insurance	-10.0	-9.3	-0.7	-2.2	-12.7	5.2	6.4	-3.5	-4.9
Real Estate	-5.5	0.6	-0.8	4.2	7.0	1.9	1.6	3.1	4.4
Office Services	-3.8	1.4	7.7	9.8	10.7	9.5	9.6	6.5	2.3
Public Administration	2.6	-0.2	-3.5	-3.2	-2.2	-1.2	1.2	-9.6	1.0
<b>TOTAL</b>	<b>-3.8</b>	<b>-0.4</b>	<b>3.7</b>	<b>6.0</b>	<b>5.3</b>	<b>6.8</b>	<b>7.3</b>	<b>4.8</b>	<b>1.8</b>



**Notes:**

- Due to rounding, figures may not add to the total shown.
- For years before 2009, sum are 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 & Figure 3.2.2**  
**RETAIL EMPLOYMENT BY INDUSTRY GROUP, 2008–2017**

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

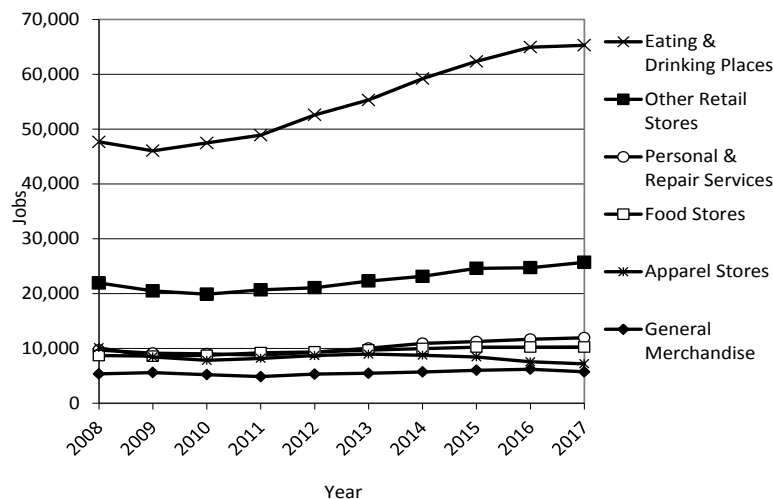
Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
General Merchandise	5,337	5,598	5,219	4,846	5,302	5,457	5,696	6,017	6,201	5,723
Food Stores	8,694	8,575	8,727	9,213	9,349	9,695	9,959	10,223	10,239	10,248
Apparel Stores	10,117	8,434	7,815	8,184	8,687	8,957	8,743	8,447	7,558	7,194
Eating & Drinking Places	47,662	46,049	47,483	48,893	52,600	55,312	59,203	62,340	64,942	65,295
Other Retail Stores	21,926	20,486	19,886	20,678	21,070	22,291	23,147	24,601	24,722	25,714
Personal & Repair Services	9,707	9,136	9,009	8,784	9,298	10,041	10,906	11,232	11,671	11,936
<b>TOTAL</b>	<b>103,443</b>	<b>98,278</b>	<b>98,139</b>	<b>100,598</b>	<b>106,306</b>	<b>111,753</b>	<b>117,654</b>	<b>122,860</b>	<b>125,333</b>	<b>126,110</b>

### Annual Percentage Distribution

Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
General Merchandise	5.2	5.7	5.3	4.8	5.0	4.9	4.8	4.9	4.9	4.5
Food Stores	8.4	8.7	8.9	9.2	8.8	8.7	8.5	8.3	8.2	8.1
Apparel Stores	9.8	8.6	8.0	8.1	8.2	8.0	7.4	6.9	6.0	5.7
Eating & Drinking Places	46.1	46.9	48.4	48.6	49.5	49.5	50.3	50.7	51.8	51.8
Other Retail Stores	21.2	20.8	20.3	20.6	19.8	19.9	19.7	20.0	19.7	20.4
Personal & Repair Services	9.4	9.3	9.2	8.7	8.7	9.0	9.3	9.1	9.3	9.5
<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

Industry Group	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
General Merchandise	4.9	-6.8	-7.1	9.4	2.9	4.4	5.6	3.1	-7.7
Food Stores	-1.4	1.8	5.6	1.5	3.7	2.7	2.7	0.2	0.1
Apparel Stores	-16.6	-7.3	4.7	6.1	3.1	-2.4	-3.4	-10.5	-4.8
Eating & Drinking Places	-3.4	3.1	3.0	7.6	5.2	7.0	5.3	4.2	0.5
Other Retail Stores	-6.6	-2.9	4.0	1.9	5.8	3.8	6.3	0.5	4.0
Personal & Repair Services	-5.9	-1.4	-2.5	5.9	8.0	8.6	3.0	3.9	2.3
<b>TOTAL</b>	<b>-5.0</b>	<b>-0.1</b>	<b>2.5</b>	<b>5.7</b>	<b>5.1</b>	<b>5.3</b>	<b>4.4</b>	<b>2.0</b>	<b>0.6</b>



#### 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 3.2.3****PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2008–2017**

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**

<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Construction	19,630	15,813	14,474	13,860	15,011	15,759	17,000	18,669	20,119	20,860
Transportation	17,484	17,044	16,305	16,052	16,135	16,431	16,837	17,726	21,825	24,055
Utilities	7,837	7,936	7,874	8,364	8,479	8,466	8,614	8,854	9,010	8,807
Information	8,359	7,165	6,565	6,531	6,724	7,176	7,221	6,400	6,371	6,096
Wholesale	12,377	10,943	10,499	10,830	12,015	13,317	13,908	14,706	15,453	16,283
Food Manufacturing	2,008	1,920	1,865	1,867	2,063	2,199	2,286	2,658	3,000	2,987
Apparel Manufacturing	2,426	1,847	1,487	1,513	1,536	1,512	1,559	1,334	1,232	1,184
Printing & Publishing	7,379	8,096	7,687	7,114	7,351	6,849	6,722	7,272	7,261	8,144
Other Manufacturing	5,626	5,963	6,211	6,335	6,323	6,525	7,372	7,971	9,867	10,435
<b>TOTAL</b>	<b>83,125</b>	<b>76,727</b>	<b>72,967</b>	<b>72,466</b>	<b>75,637</b>	<b>78,234</b>	<b>81,519</b>	<b>85,590</b>	<b>94,138</b>	<b>98,851</b>

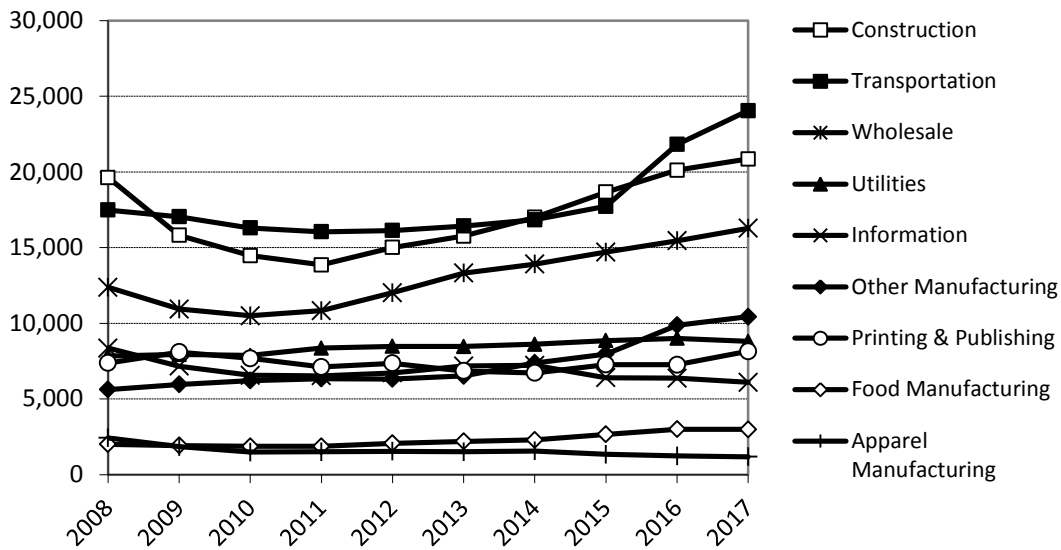
**Annual Percentage Distribution**

<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Construction	23.6	20.6	19.8	19.1	19.8	20.1	20.9	21.8	21.4	21.1
Transportation	21.0	22.2	22.3	22.2	21.3	21.0	20.7	20.7	23.2	24.3
Utilities	9.4	10.3	10.8	11.5	11.2	10.8	10.6	10.3	9.6	8.9
Information	10.1	9.3	9.0	9.0	8.9	9.2	8.9	7.5	6.8	6.2
Wholesale	14.9	14.3	14.4	14.9	15.9	17.0	17.1	17.2	16.4	16.5
Food Manufacturing	2.4	2.5	2.6	2.6	2.7	2.8	2.8	3.1	3.2	3.0
Apparel Manufacturing	2.9	2.4	2.0	2.1	2.0	1.9	1.9	1.6	1.3	1.2
Printing & Publishing	8.9	10.6	10.5	9.8	9.7	8.8	8.2	8.5	7.7	8.2
Other Manufacturing	6.8	7.8	8.5	8.7	8.4	8.3	9.0	9.3	10.5	10.6
<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**

<i>Industry Group</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Construction	-19.4	-8.5	-4.2	8.3	5.0	7.9	9.8	7.8	3.7
Transportation	-2.5	-4.3	-1.6	0.5	1.8	2.5	5.3	23.1	10.2
Utilities	1.3	-0.8	6.2	1.4	-0.2	1.7	2.8	1.8	-2.3
Information	-14.3	-8.4	-0.5	3.0	6.7	0.6	-11.4	-0.5	-4.3
Wholesale	-11.6	-4.1	3.2	10.9	10.8	4.4	5.7	5.1	5.4
Food Manufacturing	-4.4	-2.9	0.1	10.5	6.6	4.0	16.3	12.9	-0.4
Apparel Manufacturing	-23.9	-19.5	1.7	1.5	-1.6	3.1	-14.4	-7.6	-3.9
Printing & Publishing	9.7	-5.1	-7.5	3.3	-6.8	-1.9	8.2	-0.2	12.2
Other Manufacturing	6.0	4.2	2.0	-0.2	3.2	13.0	8.1	23.8	5.8
<b>TOTAL</b>	<b>-7.7</b>	<b>-4.9</b>	<b>-0.7</b>	<b>4.4</b>	<b>3.4</b>	<b>4.2</b>	<b>5.0</b>	<b>10.0</b>	<b>5.0</b>

**Figure 3.2.3**  
**PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2008–2017**



**Notes:**

- PDR = Production/Distribution/Repair
- Due to rounding, figures may not add to the total shown.
- 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 & Figure 3.2.4**

**CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) EMPLOYMENT BY INDUSTRY GROUP, 2008–2017**

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**

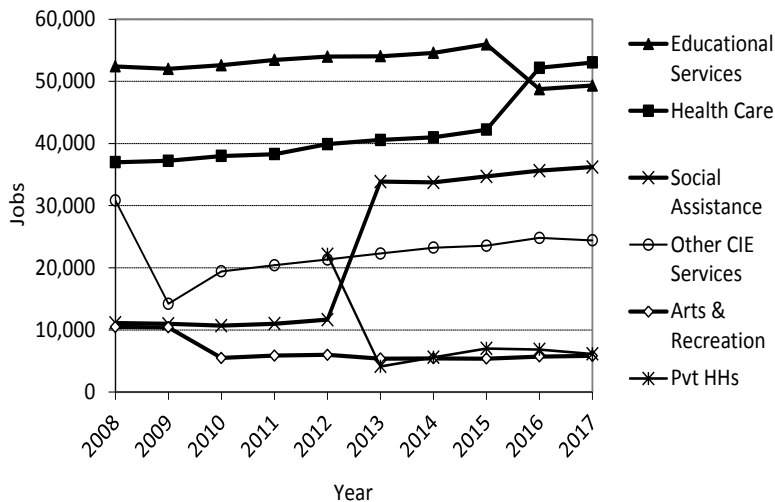
Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Art & Recreation	10,477	10,420	5,491	5,863	5,995	5,388	5,430	5,375	5,722	5,812
Health Care	36,995	37,211	37,999	38,279	39,896	40,575	40,988	42,228	52,177	53,037
Educational Services	52,424	52,022	52,595	53,470	53,996	54,048	54,602	55,951	48,746	49,327
Social Assistance	11,117	10,977	10,690	11,000	11,642	33,860	33,734	34,700	35,622	36,221
Other CIE Services	30,835	14,201	19,433	20,403	21,324	22,286	23,233	23,547	24,801	24,412
Pvt HH	-	19,443	19,819	20,327	22,156	4,113	5,597	7,015	6,853	6,138
<b>TOTAL</b>	<b>141,848</b>	<b>144,274</b>	<b>146,027</b>	<b>149,342</b>	<b>155,009</b>	<b>160,270</b>	<b>163,584</b>	<b>168,816</b>	<b>173,921</b>	<b>174,947</b>

**Annual Percentage Distribution**

Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Art & Recreation	7.4	7.2	3.8	3.9	3.9	3.4	3.3	3.2	3.3	3.3
Health Care	26.1	25.8	26.0	25.6	25.7	25.3	25.1	25.0	30.0	30.3
Educational Services	37.0	36.1	36.0	35.8	34.8	33.7	33.4	33.1	28.0	28.2
Social Assistance	7.8	7.6	7.3	7.4	7.5	21.1	20.6	20.6	20.5	20.7
Other CIE Services	21.7	9.8	13.3	13.7	13.8	13.9	14.2	13.9	14.3	14.0
Pvt HH	-	13.5	13.3	13.6	14.3	2.6	3.4	4.2	3.9	3.5
<b>TOTAL</b>	<b>100.0</b>	<b>100.0</b>	<b>99.7</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	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Art & Recreation	-0.5	-47.3	6.8	2.3	-10.1	0.8	-1.0	6.5	1.6
Health Care	0.6	2.1	0.7	4.2	1.7	1.0	3.0	23.6	1.6
Educational Services	-0.8	1.1	1.7	1.0	0.1	1.0	2.5	-12.9	1.2
Social Assistance	-1.3	-2.6	2.9	5.8	190.8	-0.4	2.9	2.7	1.7
Other CIE Services	-53.9	36.8	5.0	4.5	4.5	4.2	1.4	5.3	-1.6
Pvt HH	-	1.9	2.6	9.0	-81.4	36.1	25.3	-2.3	-10.4
<b>TOTAL</b>	<b>1.7</b>	<b>1.2</b>	<b>2.3</b>	<b>3.8</b>	<b>3.4</b>	<b>2.1</b>	<b>3.2</b>	<b>3.0</b>	<b>0.6</b>



**Notes:**

- Other CIE Services include:
  - Museums, historical sites, zoos, and parks
  - Membership associations and organizations
  - Private household employment (prior to 2009)
- \*Pvt HH = Private Household employment
- Prior to 2009, private households were counted as part of Other CIE Services and constituted the majority of Other CIE Services.
- The 54% decline in "Other CIE Services" employment between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Starting in 2014, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE. This explains the 190% jump in Social Assistance jobs from 2012-2014.
- Due to rounding, figures may not add to the total shown.

**Sources:**

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

**Table 3.3****EMPLOYMENT BY  
COMMERCE & INDUSTRY  
DISTRICT AND LAND USE  
CATEGORY, 2017**

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). The Treasure Island District was added this year.

**Employment by Land Use Category and C&I District**

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pvt HH</i>	<i>Total</i>
Bayview	2,561	3,195	12,400	11	3,224	121	21,512
Civic Center	13,790	10,529	1,855	4,367	11,709	171	42,421
Financial	156,565	20,615	31,467	5,207	16,438	850	231,142
Mission	5,706	7,467	3,336	29	6,961	379	23,878
North Beach	4,557	8,375	1,536	1,060	5,043	191	20,762
North Central	5,268	12,602	2,274	595	29,910	956	51,605
Northwest	5,111	7,120	2,860	50	14,626	634	30,401
South of Market	80,248	28,206	32,566	3,517	42,332	630	187,499
Southwest	8,008	16,391	4,597	141	27,611	1,181	57,929
Van Ness	4,273	7,239	929	999	7,426	358	21,224
Treasure Island	42	15	135	0	709	5	906
Unclassified	12,515	4,356	4,898	166	2,821	662	25,418
<b>TOTAL</b>	<b>298,644</b>	<b>126,110</b>	<b>98,853</b>	<b>16,142</b>	<b>168,810</b>	<b>6,138</b>	<b>714,697</b>

**Percentage Distribution by Commerce and Industry District**

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pvt HH</i>	<i>Total</i>
Bayview	0.9	2.5	12.5	0.1	1.9	2.0	3.0
Civic Center	4.6	8.3	1.9	27.1	6.9	2.8	5.9
Financial	52.4	16.3	31.8	32.3	9.7	13.8	32.3
Mission	1.9	5.9	3.4	0.2	4.1	6.2	3.3
North Beach	1.5	6.6	1.6	6.6	3.0	3.1	2.9
North Central	1.8	10.0	2.3	3.7	17.7	15.6	7.2
Northwest	1.7	5.6	2.9	0.3	8.7	10.3	4.3
South of Market	26.9	22.4	32.9	21.8	25.1	10.3	26.2
Southwest	2.7	13.0	4.7	0.9	16.4	19.2	8.1
Van Ness	1.4	5.7	0.9	6.2	4.4	5.8	3.0
Treasure Island	0.0	0.0	0.1	0.0	0.4	0.1	0.1
Unclassified	4.2	3.5	5.0	1.0	1.7	10.8	3.6
<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 Distribution by Land Use Category**

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pvt HH</i>	<i>Total</i>
Bayview	11.9	14.9	57.6	0.1	15.0	0.6	100.0
Civic Center	32.5	24.8	4.4	10.3	27.6	0.4	100.0
Financial	67.7	8.9	13.6	2.3	7.1	0.4	100.0
Mission	23.9	31.3	14.0	0.1	29.2	1.6	100.0
North Beach	21.9	40.3	7.4	5.1	24.3	0.9	100.0
North Central	10.2	24.4	4.4	1.2	58.0	1.9	100.0
Northwest	16.8	23.4	9.4	0.2	48.1	2.1	100.0
South of Market	42.8	15.0	17.4	1.9	22.6	0.3	100.0
Southwest	13.8	28.3	7.9	0.2	47.7	2.0	100.0
Van Ness	20.1	34.1	4.4	4.7	35.0	1.7	100.0
Treasure Island	4.6	1.7	14.9	0.0	78.3	0.6	100.0
Unclassified	49.2	17.1	19.3	0.7	11.1	2.6	100.0
<b>TOTAL</b>	<b>41.8</b>	<b>17.6</b>	<b>13.8</b>	<b>2.3</b>	<b>23.6</b>	<b>0.9</b>	<b>100.0</b>

**Notes:**

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- Prior to 2008, Households (NAICS 814) were counted under the CIE land use category; In 2009, they were counted as Other.
- See Map 1.1 for San Francisco C & I district boundaries

**Sources:**

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



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# 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).

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). Beginning in 2009, establishment data are also reported for Private Households (Pvt HH). 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 household establishments were previously counted under the CIE land use category. For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 - Data Formats. In addition, some data are reported for a new Commerce and Industry District, Treasure Island.

*Table 4.1* shows establishment data by Land Use Category from 2008 to 2017. *Tables 4.2.1* through *4.2.4* show establishment data by Industry Group within each Land Use Category in San Francisco from 2008 to 2017. *Tables 4.3* and *4.4* present San Francisco establishments for 2017 in geographic context. *Table 4.3* shows the distribution of establishments throughout the city by Land

Use Category type. *Table 4.4* shows the distribution of establishments throughout the city by employer size.

The tables show a number of establishments for whom the geographical location is not known or which are at the San Francisco International Airport. These have been placed under an Unclassified category. Other establishments that have not registered a physical address with the State and thus cannot be classified under a specific geographic district are also included in this category.

**Table 4.1**  
**SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2008–2017**

This table contains the number of establishments in each of the five major non-residential land use categories in San Francisco. 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 2011) and 4.1.2 (a look at ten year trends).

#### Number of Establishments

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	11,292	11,419	11,430	11,511	11,938	12,542	13,366	13,595	13,578	13,989
Retail	7,473	7,496	7,541	7,516	7,666	7,947	8,189	8,332	8,403	8,464
PDR	4,812	4,718	4,614	4,483	4,500	4,596	4,700	4,717	4,799	4,878
Hotel	288	292	299	290	297	305	311	312	304	306
CIE	20,710	4,739	4,794	4,844	4,930	25,597	26,246	26,469	26,564	26,792
Pvt HH		22,864	24,161	26,607	26,140	4,184	4,240	5,034	5,654	5,132
<b>TOTAL</b>	<b>44,575</b>	<b>51,528</b>	<b>52,839</b>	<b>55,251</b>	<b>55,471</b>	<b>55,171</b>	<b>57,052</b>	<b>58,459</b>	<b>59,302</b>	<b>59,561</b>

#### Annual Percentage Distribution

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	25.3	22.2	21.6	20.8	21.5	22.7	23.4	23.3	22.9	23.5
Retail	16.8	14.5	14.3	13.6	13.8	14.4	14.4	14.3	14.2	14.2
PDR	10.8	9.2	8.7	8.1	8.1	8.3	8.2	8.1	8.1	8.2
Hotel	0.6	0.6	0.6	0.5	0.5	0.6	0.5	0.5	0.5	0.5
CIE	46.5	9.2	9.1	8.8	8.9	46.4	46.0	45.3	44.8	45.0
Pvt HH	-	44.4	45.7	48.2	47.1	7.6	7.4	8.6	9.5	8.6
<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

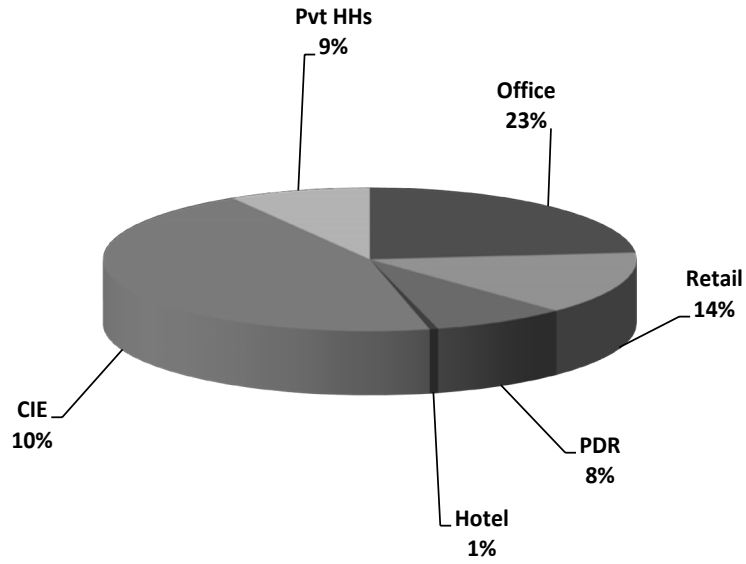
Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	1.1	0.1	0.7	3.7	5.1	6.6	1.7	-0.1	3.0
Retail	0.3	0.6	-0.3	2.0	3.7	3.0	1.7	0.9	0.7
PDR	-2.0	-2.2	-2.8	0.4	2.1	2.3	0.4	1.7	1.6
Hotel	1.4	2.4	-3.0	2.4	2.7	2.0	0.3	-2.6	0.7
CIE	-77.1	1.2	1.0	1.8	419.2	2.5	0.8	0.4	0.9
Pvt HH	-	5.7	10.1	-1.8	-84.0	1.3	18.7	12.3	-9.2
<b>TOTAL</b>	<b>15.6</b>	<b>2.5</b>	<b>4.6</b>	<b>0.4</b>	<b>-0.5</b>	<b>3.4</b>	<b>2.5</b>	<b>1.4</b>	<b>0.4</b>

#### Notes:

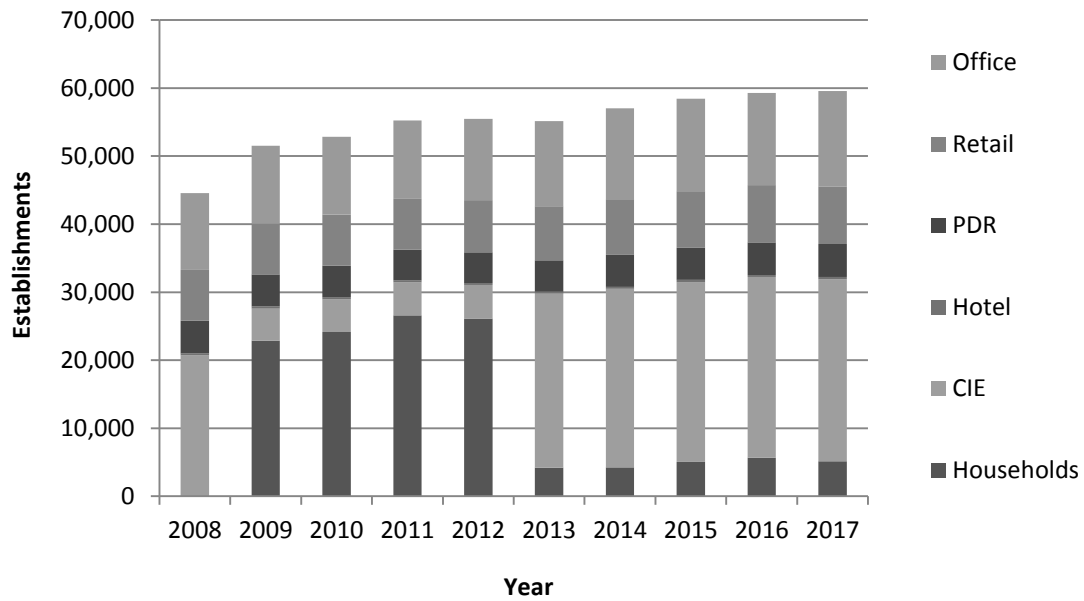
- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- \*The 81% decline in CIE establishments between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Prior to 2009, private households were counted as part of CIE.
- Starting in 2014, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

#### Sources:

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



**Figure 4.1.1b**  
**SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2008–2017**



**Table & Figure 4.2.1**

**OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2008–2017**

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**

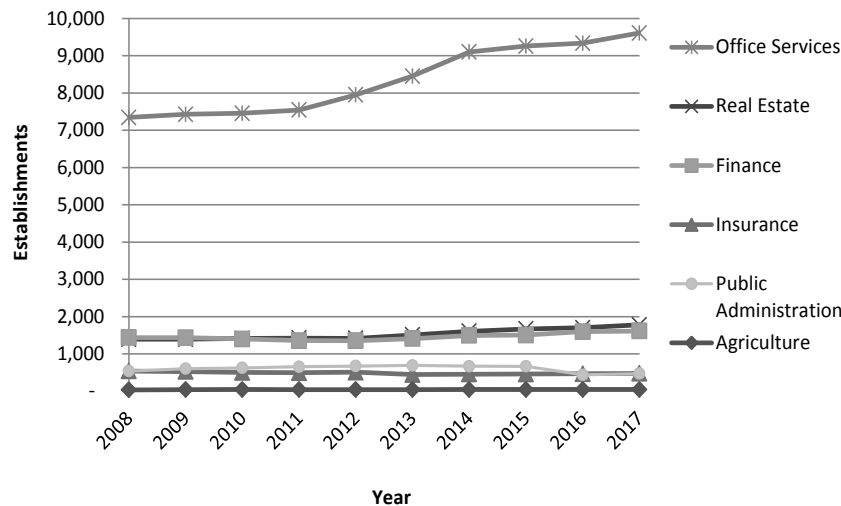
Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Agriculture	34	39	43	41	38	40	44	43	42	44
Finance	1,436	1,434	1,399	1,357	1,353	1,410	1,493	1,504	1,593	1,612
Insurance	537	525	498	492	508	445	454	456	466	474
Real Estate	1,393	1,391	1,412	1,424	1,417	1,506	1,604	1,668	1,699	1,778
Office Services	7,343	7,429	7,456	7,544	7,951	8,454	9,104	9,260	9,340	9,612
Public Administration	540	601	622	653	671	688	668	663	438	468
<b>TOTAL</b>	<b>11,283</b>	<b>11,419</b>	<b>11,430</b>	<b>11,511</b>	<b>11,938</b>	<b>12,543</b>	<b>13,367</b>	<b>13,594</b>	<b>13,578</b>	<b>13,988</b>

**Annual Percentage Distribution**

Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Agriculture	0.3	0.3	0.4	0.4	0.3	0.3	0.3	0.3	0.3	0.3
Finance	12.7	12.6	12.2	11.8	11.3	11.2	11.2	11.1	11.7	11.5
Insurance	4.8	4.6	4.4	4.3	4.3	3.5	3.4	3.4	3.4	3.4
Real Estate	12.3	12.2	12.4	12.4	11.9	12.0	12.0	12.3	12.5	12.7
Office Services	65.1	65.1	65.2	65.5	66.6	67.4	68.1	68.1	68.8	68.7
Public Administration	4.8	5.3	5.4	5.7	5.6	5.5	5.0	4.9	3.2	3.3
<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**

Industry Group	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Agriculture	14.7	10.3	-4.7	-7.3	15.8	10.0	-2.3	-2.3	4.8
Finance	-0.1	-2.4	-3.0	-0.3	10.3	5.9	0.7	5.9	1.2
Insurance	-2.3	-5.1	-1.2	3.3	-10.6	2.0	0.4	2.2	1.7
Real Estate	-0.1	1.5	0.8	-0.5	13.2	6.5	4.0	1.9	4.6
Office Services	1.2	0.4	1.2	5.4	14.5	7.7	1.7	0.9	2.9
Public Administration	11.4	3.5	5.0	2.8	-0.4	-2.9	-0.7	-33.9	6.8
<b>TOTAL</b>	<b>1.2</b>	<b>0.1</b>	<b>0.7</b>	<b>3.7</b>	<b>12.0</b>	<b>6.6</b>	<b>1.7</b>	<b>-0.1</b>	<b>3.0</b>



**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
- Prior to 2009, sums are 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 & Figure 4.2.2****RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2008–2017**

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**

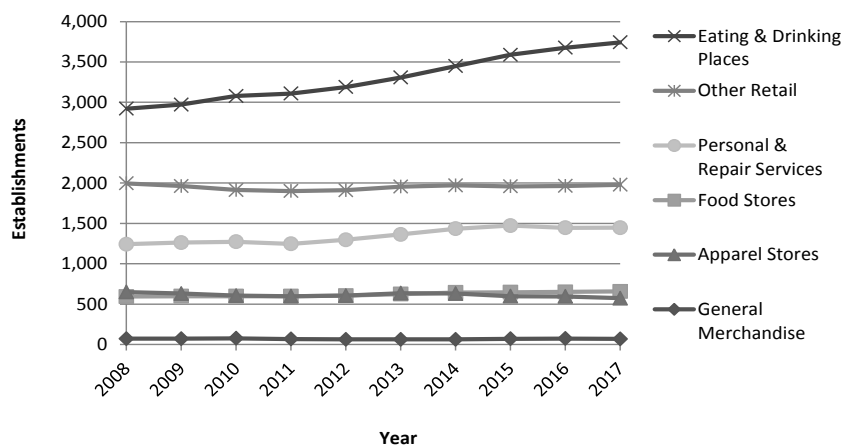
Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
General Merchandise	71	72	76	67	62	63	63	70	73	68
Food Stores	594	598	597	597	605	624	644	646	651	656
Apparel Stores	650	630	604	598	605	635	630	597	594	573
Eating & Drinking Places	2,921	2,972	3,078	3,108	3,189	3,307	3,448	3,588	3,676	3,742
Other Retail	1,995	1,962	1,914	1,900	1,910	1,955	1,971	1,958	1,964	1,978
Personal & Repair Services	1,242	1,262	1,272	1,246	1,296	1,363	1,433	1,472	1,445	1,446
<b>TOTAL</b>	<b>7,473</b>	<b>7,496</b>	<b>7,541</b>	<b>7,516</b>	<b>7,667</b>	<b>7,947</b>	<b>8,189</b>	<b>8,331</b>	<b>8,403</b>	<b>8,463</b>

**Annual Percentage Distribution**

Industry Group	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
General Merchandise	1.0	1.0	1.0	0.9	0.8	0.8	0.8	0.8	0.9	0.8
Food Stores	7.9	8.0	7.9	7.9	7.9	7.9	7.9	7.8	7.7	7.8
Apparel Stores	8.7	8.4	8.0	8.0	7.9	8.0	7.7	7.2	7.1	6.8
Eating & Drinking Places	39.1	39.6	40.8	41.4	41.6	41.6	42.1	43.1	43.7	44.2
Other Retail	26.7	26.2	25.4	25.3	24.9	24.6	24.1	23.5	23.4	23.4
Personal & Repair Services	16.6	16.8	16.9	16.6	16.9	17.2	17.5	17.7	17.2	17.1
<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	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
General Merchandise	1.4	5.6	-11.8	-7.5	1.6	0.0	11.1	4.3	-6.8
Food Stores	0.8	-0.2	0.0	1.3	6.4	3.2	0.3	0.8	0.8
Apparel Stores	-3.1	-4.1	-1.0	1.2	4.1	-0.8	-5.2	-0.5	-3.5
Eating & Drinking Places	1.8	3.6	1.0	2.6	8.1	4.3	4.1	2.5	1.8
Other Retail	-1.7	-2.4	-0.7	0.5	3.2	0.8	-0.7	0.3	0.7
Personal & Repair Services	1.6	0.8	-2.0	4.0	10.6	5.1	2.7	-1.8	0.1
<b>TOTAL</b>	<b>0.3</b>	<b>0.6</b>	<b>-0.3</b>	<b>2.0</b>	<b>6.8</b>	<b>3.0</b>	<b>1.7</b>	<b>0.9</b>	<b>0.7</b>

**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, 2008–2017**

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**

<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Construction	1,676	1,641	1,598	1,538	1,515	1,551	1,610	1,632	1,686	1,715
Transportation	503	418	417	398	400	408	429	433	430	437
Utilities	25	22	25	31	36	36	44	48	46	52
Information	249	247	240	230	229	228	218	180	170	164
Wholesale	1,302	1,253	1,210	1,178	1,196	1,268	1,257	1,236	1,212	1,171
Food Manufacturing	143	140	144	146	157	161	170	177	190	204
Apparel Manufacturing	163	155	146	141	133	128	119	113	107	97
Printing & Publishing	343	342	328	324	338	318	343	392	445	496
Other Manufacturing	410	500	506	499	495	498	511	506	513	543
<b>TOTAL</b>	<b>4,812</b>	<b>4,718</b>	<b>4,614</b>	<b>4,485</b>	<b>4,499</b>	<b>4,596</b>	<b>4,701</b>	<b>4,717</b>	<b>4,799</b>	<b>4,879</b>

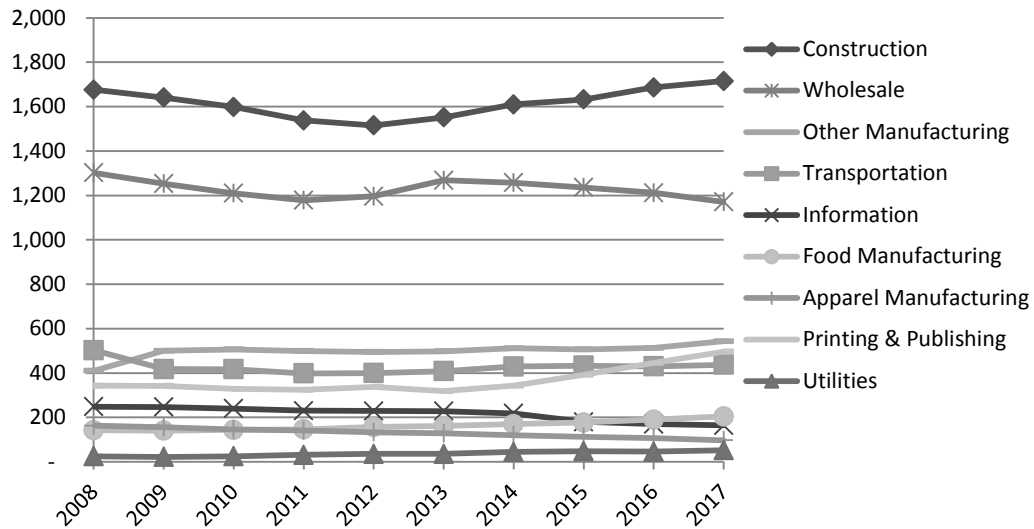
**Annual Percentage Distribution**

<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Construction	34.8	34.8	34.6	34.3	33.7	33.7	34.2	34.6	35.1	35.2
Transportation	10.4	8.9	9.0	8.9	8.9	8.9	9.1	9.2	9.0	9.0
Utilities	0.5	0.5	0.5	0.7	0.8	0.8	0.9	1.0	1.0	1.1
Information	5.2	5.2	5.2	5.1	5.1	5.0	4.6	3.8	3.5	3.4
Wholesale	27.1	26.6	26.2	26.3	26.6	27.6	26.7	26.2	25.3	24.0
Food Manufacturing	3.0	3.0	3.1	3.3	3.5	3.5	3.6	3.8	4.0	4.2
Apparel Manufacturing	3.4	3.3	3.2	3.1	3.0	2.8	2.5	2.4	2.2	2.0
Printing & Publishing	7.1	7.2	7.1	7.2	7.5	6.9	7.3	8.3	9.3	10.2
Other Manufacturing	8.5	10.6	11.0	11.1	11.0	10.8	10.9	10.7	10.7	11.1
<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**

<i>Industry Group</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-2017
Construction	-2.1	-2.6	-3.8	-1.5	6.3	3.8	1.4	3.3	1.7
Transportation	-16.8	-0.2	-4.6	0.5	7.3	5.1	0.9	-0.7	1.6
Utilities	-12.0	13.6	24.0	16.1	22.2	22.2	9.1	-4.2	13.0
Information	-0.6	-2.8	-4.2	-0.4	-4.8	-4.4	-17.4	-5.6	-3.5
Wholesale	-3.7	-3.4	-2.6	1.5	5.1	-0.9	-1.7	-1.9	-3.4
Food Manufacturing	-1.8	2.9	1.4	7.5	8.3	5.6	4.1	7.3	7.4
Apparel Manufacturing	-4.6	-5.8	-3.4	-5.7	-10.5	-7.0	-5.0	-5.3	-9.3
Printing & Publishing	-0.3	-4.1	-1.2	4.3	1.5	7.9	14.3	13.5	11.5
Other Manufacturing	22.0	1.2	-1.4	-0.8	3.2	2.6	-1.0	1.4	5.8
<b>TOTAL</b>	<b>-1.9</b>	<b>-2.2</b>	<b>-2.8</b>	<b>0.3</b>	<b>4.5</b>	<b>2.3</b>	<b>0.3</b>	<b>1.7</b>	<b>1.7</b>

**Figure 4.2.3**  
**PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2008–2017**



**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) AND PRIVATE HOUSEHOLD (Pvt HH) ESTABLISHMENTS BY INDUSTRY GROUP, 2008–2017**

This table presents establishment trends in the cultural/institutional/educational (CIE) and in the private household (Pvt HH) land use categories. 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**

<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Arts & Recreation	416	416	246	249	253	265	287	291	306	304
Health Care	2,055	2,071	2,111	2,113	2,120	2,152	2,238	2,259	2,290	2,285
Educational Services	697	703	705	714	726	906	934	934	972	991
Social Assistance*	600	623	628	655	677	21,082	21,523	21,706	21,684	21,864
Other CIE Services*	21,122	926	1,104	1,112	1,154	1,192	1,264	1,279	1,311	1,349
Pvt HH*	-	22,864	24,161	26,607	26,140	4,183	4,239	5,034	5,655	5,131
<b>TOTAL</b>	<b>24,888</b>	<b>27,603</b>	<b>28,955</b>	<b>31,450</b>	<b>31,070</b>	<b>29,780</b>	<b>30,485</b>	<b>31,503</b>	<b>32,218</b>	<b>31,924</b>

**Annual Percentage Distribution**

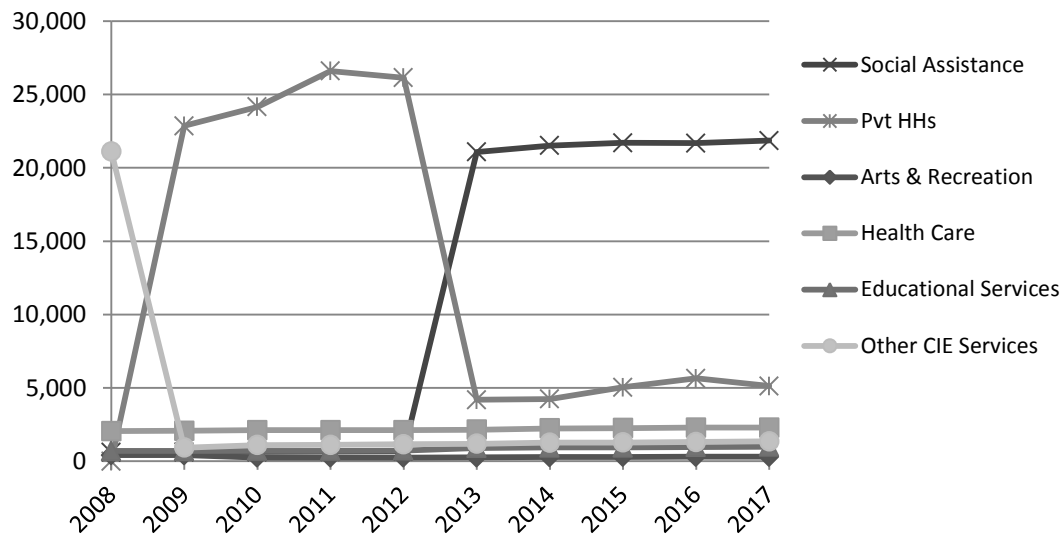
<i>Industry Group</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Arts & Recreation	1.7	1.5	0.8	0.8	0.8	0.9	0.9	0.9	0.9	1.0
Health Care	8.3	7.5	7.3	6.7	6.8	7.2	7.3	7.2	7.1	7.2
Educational Services	2.8	2.5	2.4	2.3	2.3	3.0	3.1	3.0	3.0	3.1
Social Assistance*	2.4	2.3	2.2	2.1	2.2	70.8	70.6	68.9	67.3	68.5
Other CIE Services*	84.9	3.4	3.8	3.5	3.7	4.0	4.1	4.1	4.1	4.2
Pvt HH*	-	82.8	83.4	84.6	84.1	14.0	13.9	16.0	17.6	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**

<i>Industry Group</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Arts & Recreation	0.0	-40.8	1.2	1.6	4.7	8.3	1.4	5.2	-0.7
Health Care	0.8	1.9	0.1	0.3	1.5	4.0	0.9	1.4	-0.2
Educational Services	0.9	0.3	1.3	1.7	24.8	3.1	0.0	4.1	2.0
Social Assistance*	3.9	0.8	4.3	3.4	3,014.0	2.1	0.9	-0.1	0.8
Other CIE Services*	-95.6	19.2	0.7	3.8	3.3	6.0	1.2	2.5	2.9
Pvt HH*	-	5.7	10.1	-1.8	-84.0	1.3	18.8	12.3	-9.3
<b>TOTAL</b>	<b>10.9</b>	<b>4.9</b>	<b>8.6</b>	<b>-1.2</b>	<b>-4.2</b>	<b>2.4</b>	<b>3.3</b>	<b>2.3</b>	<b>-0.9</b>

\* The grouping of subcategories of data has changed periodically between sectors and this accounts for the data discontinuities.

**Figure 4.2.4**  
**CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2008–2017**



**Notes:**

- Other CIE Services include:
  - Museums, historical sites, zoos, and parks
  - Membership associations and organizations
  - Private household employment (prior to 2009)
- Pvt HH = Private Household employment
- \*The 95.6% decline in Other CIE Services establishments between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Starting in 2014, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE. This explains the large jump in Social Assistance establishments from 2012-2014.

**Sources:**

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

\*\* The grouping of subcategories of data has changed periodically between sectors and this accounts for the data discontinuities.

**Table 4.3**  
**ESTABLISHMENTS BY**  
**COMMERCE & INDUSTRY**  
**DISTRICT AND LAND USE**  
**CATEGORY, 2017**

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

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pvt HHs</i>	<i>Total</i>
Bayview	202	254	683	3	1,504	101	2,747
Civic Center	868	508	114	64	2,291	137	3,982
Financial	5,507	1,310	781	50	2,031	584	10,263
Mission	552	646	310	8	1,616	324	3,456
North Beach	438	508	140	23	1,712	151	2,972
North Central	1,010	1,043	241	44	2,616	833	5,787
Northwest	654	609	279	4	2,231	508	4,285
South of Market	2,176	1,285	1,056	42	2,751	466	7,776
Southwest	1,528	1,559	974	18	7,659	1,358	13,096
Van Ness	554	561	112	41	1,777	258	3,303
Treasure Island	9	3	14	0	69	6	101
Unclassified	491	178	174	9	535	406	1,793
<b>TOTAL</b>	<b>13,989</b>	<b>8,464</b>	<b>4,878</b>	<b>306</b>	<b>26,792</b>	<b>5,132</b>	<b>59,561</b>

#### Percentage Distribution by Commerce and Industry District

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pvt HHs</i>	<i>Total</i>
Bayview	1.4	3.0	14.0	1.0	5.6	2.0	4.6
Civic Center	6.2	6.0	2.3	20.9	8.6	2.7	6.7
Financial	39.4	15.5	16.0	16.3	7.6	11.4	17.2
Mission	3.9	7.6	6.4	2.6	6.0	6.3	5.8
North Beach	3.1	6.0	2.9	7.5	6.4	2.9	5.0
North Central	7.2	12.3	4.9	14.4	9.8	16.2	9.7
Northwest	4.7	7.2	5.7	1.3	8.3	9.9	7.2
South of Market	15.6	15.2	21.6	13.7	10.3	9.1	13.1
Southwest	10.9	18.4	20.0	5.9	28.6	26.5	22.0
Van Ness	4.0	6.6	2.3	13.4	6.6	5.0	5.5
Treasure Island	0.1	0.0	0.3	0.0	0.3	0.1	0.2
Unclassified	3.5	2.1	3.6	2.9	2.0	7.9	3.0
<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 Distribution by Land Use Category

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Pvt HHs</i>	<i>Total</i>
Bayview	7.4	9.2	24.9	0.1	54.8	3.7	100.0
Civic Center	21.8	12.8	2.9	1.6	57.5	3.4	100.0
Financial	53.7	12.8	7.6	0.5	19.8	5.7	100.0
Mission	16.0	18.7	9.0	0.2	46.8	9.4	100.0
North Beach	14.7	17.1	4.7	0.8	57.6	5.1	100.0
North Central	17.5	18.0	4.2	0.8	45.2	14.4	100.0
Northwest	15.3	14.2	6.5	0.1	52.1	11.9	100.0
South of Market	28.0	16.5	13.6	0.5	35.4	6.0	100.0
Southwest	11.7	11.9	7.4	0.1	58.5	10.4	100.0
Van Ness	16.8	17.0	3.4	1.2	53.8	7.8	100.0
Treasure Island	8.9	3.0	13.9	0.0	68.3	5.9	100.0
Unclassified	27.4	9.9	9.7	0.5	29.8	22.6	100.0
<b>TOTAL</b>	<b>23.5</b>	<b>14.2</b>	<b>8.2</b>	<b>0.5</b>	<b>45.0</b>	<b>8.6</b>	<b>100.0</b>

#### Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Pvt HH = Private Household employment
- Prior to 2009, Private households (NAICS 814) were counted under the CIE land use category.
- Tables 4.2.1-4.2.4 provide detailed information of various components of Office, Retail, PDR and CIE respectively.

#### Sources:

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

**Table 4.4**  
**ESTABLISHMENTS BY**  
**COMMERCE & INDUSTRY**  
**DISTRICT AND SIZE**  
**CLASS, 2017**

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

<i>C&amp;I District</i>	<i>0-4</i>	<i>5-9</i>	<i>10-19</i>	<i>20-49</i>	<i>50-99</i>	<i>100-249</i>	<i>250-499</i>	<i>500-999</i>	<i>1000+</i>	<i>TOTAL</i>
Bayview	2,005	267	231	158	51	31	4	0	0	2,747
Civic Center	2,889	383	306	251	94	37	11	8	3	3,982
Financial	5,546	1,560	1,226	1,071	467	251	87	35	22	10,265
Mission	2,548	391	274	166	53	18	4	2	0	3,456
North Beach	2,283	273	212	139	38	21	4	2	0	2,972
North Central	4,408	588	441	226	80	33	3	2	6	5,787
Northwest	3,395	385	278	149	42	20	10	4	2	4,285
South of Market	4,921	984	825	583	221	145	52	22	22	7,775
Southwest	10,814	1,053	679	394	104	41	8	2	1	13,096
Van Ness	2,587	297	217	133	40	22	6	0	1	3,303
Treasure Island	78	12	6	3	0	1	1	0	0	101
Unclassified	1,323	187	142	81	29	22	7	2	1	1,794
<b>TOTAL</b>	<b>42,797</b>	<b>6,380</b>	<b>4,837</b>	<b>3,354</b>	<b>1,219</b>	<b>642</b>	<b>197</b>	<b>79</b>	<b>58</b>	<b>59,563</b>

### Percentage Distribution by C&I District

<i>C&amp;I District</i>	<i>0-4</i>	<i>5-9</i>	<i>10-19</i>	<i>20-49</i>	<i>50-99</i>	<i>100-249</i>	<i>250-499</i>	<i>500-999</i>	<i>1000+</i>	<i>TOTAL</i>
Bayview	4.7	4.2	4.8	4.7	4.2	4.8	2.0	0.0	0.0	4.6
Civic Center	6.8	6.0	6.3	7.5	7.7	5.8	5.6	10.1	5.2	6.7
Financial	13.0	24.5	25.3	31.9	38.3	39.1	44.2	44.3	37.9	17.2
Mission	6.0	6.1	5.7	4.9	4.3	2.8	2.0	2.5	0.0	5.8
North Beach	5.3	4.3	4.4	4.1	3.1	3.3	2.0	2.5	0.0	5.0
North Central	10.3	9.2	9.1	6.7	6.6	5.1	1.5	2.5	10.3	9.7
Northwest	7.9	6.0	5.7	4.4	3.4	3.1	5.1	5.1	3.4	7.2
South of Market	11.5	15.4	17.1	17.4	18.1	22.6	26.4	27.8	37.9	13.1
Southwest	25.3	16.5	14.0	11.7	8.5	6.4	4.1	2.5	1.7	22.0
Van Ness	6.0	4.7	4.5	4.0	3.3	3.4	3.0	0.0	1.7	5.5
Treasure Island	0.2	0.2	0.1	0.1	0.0	0.2	0.5	0.0	0.0	0.2
Unclassified	3.1	2.9	2.9	2.4	2.4	3.4	3.6	2.5	1.7	3.0
<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 Distribution by Size Class

<i>C&amp;I District</i>	<i>0-4</i>	<i>5-9</i>	<i>10-19</i>	<i>20-49</i>	<i>50-99</i>	<i>100-249</i>	<i>250-499</i>	<i>500-999</i>	<i>1000+</i>	<i>TOTAL</i>
Bayview	73.0	9.7	8.4	5.8	1.9	1.1	0.1	0.0	0.0	100.0
Civic Center	72.6	9.6	7.7	6.3	2.4	0.9	0.3	0.2	0.1	100.0
Financial	54.0	15.2	11.9	10.4	4.5	2.4	0.8	0.3	0.2	100.0
Mission	73.7	11.3	7.9	4.8	1.5	0.5	0.1	0.1	0.0	100.0
North Beach	76.8	9.2	7.1	4.7	1.3	0.7	0.1	0.1	0.0	100.0
North Central	76.2	10.2	7.6	3.9	1.4	0.6	0.1	0.0	0.1	100.0
Northwest	79.2	9.0	6.5	3.5	1.0	0.5	0.2	0.1	0.0	100.0
South of Market	63.3	12.7	10.6	7.5	2.8	1.9	0.7	0.3	0.3	100.0
Southwest	82.6	8.0	5.2	3.0	0.8	0.3	0.1	0.0	0.0	100.0
Van Ness	78.3	9.0	6.6	4.0	1.2	0.7	0.2	0.0	0.0	100.0
Treasure Island	77.2	11.9	5.9	3.0	0.0	1.0	1.0	0.0	0.0	100.0
Unclassified	73.7	10.4	7.9	4.5	1.6	1.2	0.4	0.1	0.1	100.0
<b>TOTAL</b>	<b>71.9</b>	<b>10.7</b>	<b>8.1</b>	<b>5.6</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.

**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 health 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 over the past decade, 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 2017. Section 5.3 reports city government revenues and expenditures in fiscal year 2017 (July 1, 2015 to June 30, 2017). 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.

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 2006 to 2016. 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.

## 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 2008–2017. 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 quarterly by type of business for all cities and counties in California.

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.

### 5.3 CITY REVENUES AND EXPENDITURES

Section 5.3 presents San Francisco city government revenues and expenditures for the fiscal year. 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 the fiscal year. 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 5.1.1 (next page)* **TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2008–2017**

This table contains the amount of wages paid to workers in each of the five major non-residential land use categories in San Francisco (see Section 1.2 - Data Formats for a description of land use categories and discussion of NAICS categories). Also included is the percentage distribution in each year and the annual change within each land use category. The data are also presented graphically below in Figures 5.1.1a (a snapshot of job distribution in 2014) and 5.1.1b (a look at ten-year trends).

##### **Notes:**

- Totals also include wages from some unclassified land uses.
- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- Prior to 2009, Private Households were counted under the CIE land use category.

##### **Sources:**

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics



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

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$25,544,356	\$23,203,283	\$24,028,220	\$26,733,245	\$28,914,202	\$31,429,114	\$36,255,578	\$40,710,069	\$44,405,346	\$48,718,274
Retail	\$3,233,372	\$3,020,532	\$3,139,383	\$3,333,231	\$3,638,752	\$3,915,844	\$4,183,695	\$4,647,516	\$4,751,705	\$5,121,471
PDR	\$6,319,130	\$5,897,953	\$5,868,508	\$6,007,279	\$6,852,515	\$7,137,839	\$7,928,621	\$8,649,602	\$10,123,258	\$11,290,552
Hotel	\$764,622	\$695,174	\$691,582	\$736,805	\$740,550	\$803,545	\$778,152	\$830,804	\$848,666	\$825,242
CIE	\$7,325,473	\$7,249,460	\$7,541,484	\$7,858,454	\$8,406,144	\$8,999,560	\$9,462,599	\$10,220,937	\$10,975,933	\$11,584,895
Pvt HH	--	\$375,303	\$314,522	\$288,029	\$293,476	\$75,279	\$267,581	\$391,952	\$374,003	\$363,945
<b>TOTAL</b>	<b>\$43,316,200</b>	<b>\$40,441,705</b>	<b>\$41,667,560</b>	<b>\$45,112,659</b>	<b>\$48,993,364</b>	<b>\$52,480,447</b>	<b>\$58,876,225</b>	<b>\$65,450,879</b>	<b>\$71,478,911</b>	<b>\$77,904,378</b>

**Inflation-Adjusted (2017 \$ 000s)**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$31,525,121	\$28,428,171	\$29,041,032	\$31,490,684	\$33,170,073	\$35,264,517	\$39,556,039	\$43,284,559	\$45,835,819	\$48,718,274
Retail	\$3,990,410	\$3,700,692	\$3,794,327	\$3,926,412	\$4,174,339	\$4,393,707	\$4,564,550	\$4,941,423	\$4,904,776	\$5,121,471
PDR	\$7,798,644	\$7,226,047	\$7,092,807	\$7,076,332	\$7,861,134	\$8,008,895	\$8,650,389	\$9,196,599	\$10,449,368	\$11,290,552
Hotel	\$943,645	\$851,712	\$835,862	\$867,927	\$849,551	\$901,604	\$848,989	\$883,344	\$876,005	\$825,242
CIE	\$9,040,604	\$8,881,885	\$9,114,802	\$9,256,942	\$9,643,441	\$10,097,808	\$10,324,009	\$10,867,306	\$11,329,512	\$11,584,895
Pvt HH	-	\$459,813	\$481,493	\$522,595	\$506,143	\$218,285	\$291,940	\$416,739	\$386,051	\$363,945
<b>TOTAL</b>	<b>\$53,457,931</b>	<b>\$49,548,320</b>	<b>\$50,360,323</b>	<b>\$53,140,892</b>	<b>\$56,204,680</b>	<b>\$58,884,816</b>	<b>\$64,235,916</b>	<b>\$69,589,969</b>	<b>\$73,781,531</b>	<b>\$77,904,378</b>

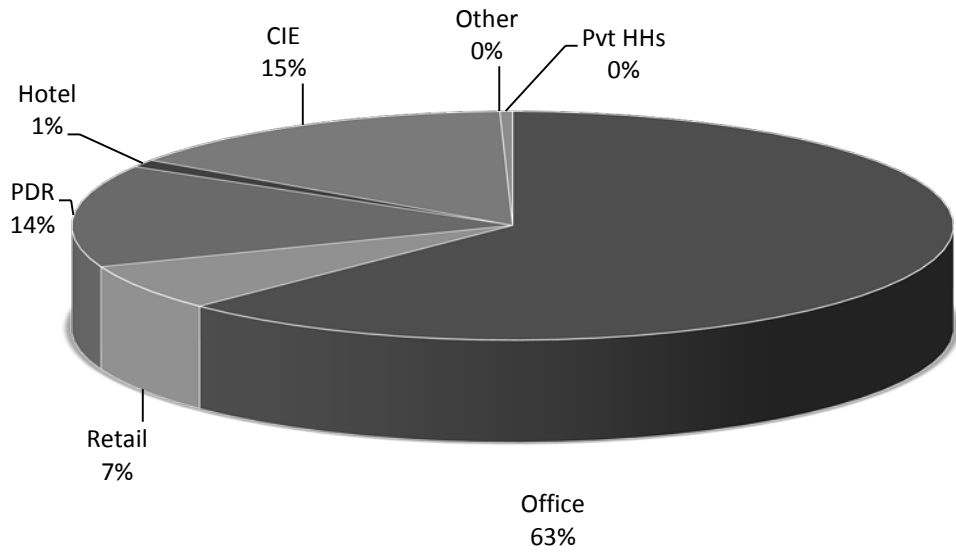
**Annual Percentage Distribution**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	59.0	57.4	57.7	59.3	59.0	59.9	61.6	62.2	62.1	62.5
Retail	7.5	7.5	7.5	7.4	7.4	7.5	7.1	7.1	6.6	6.6
PDR	14.6	14.6	14.1	13.3	14.0	13.6	13.5	13.2	14.2	14.5
Hotel	1.8	1.7	1.7	1.6	1.5	1.5	1.3	1.3	1.2	1.1
CIE	16.9	17.9	18.1	17.4	17.2	17.1	16.1	15.6	15.4	14.9
Pvt HH	-	-	1.0	1.0	0.9	0.4	0.5	0.6	0.5	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>

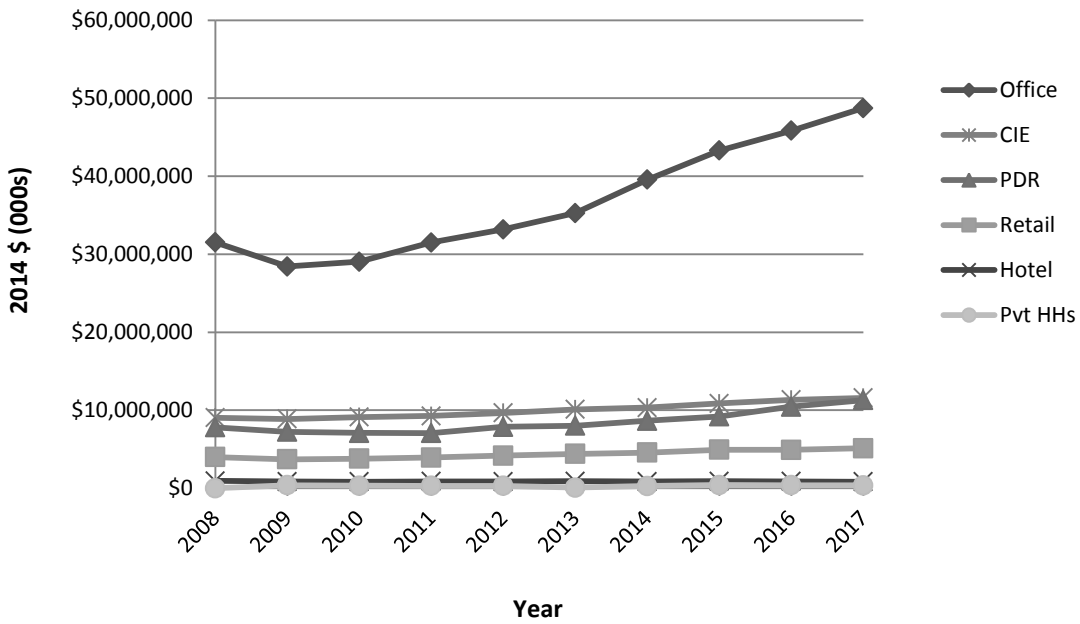
**Percentage Change**

Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-9.8	2.2	8.4	5.3	6.3	12.2	9.4	5.9	6.3
Retail	-7.3	2.5	3.5	6.3	5.3	3.9	8.3	-0.7	4.4
PDR	-7.3	-1.8	-0.2	11.1	1.9	8.0	6.3	13.6	8.1
Hotel	-9.7	-1.9	3.8	-2.1	6.1	-5.8	4.0	-0.8	-5.8
CIE	-1.8	2.6	1.6	4.2	4.7	2.2	5.3	4.3	2.3
Pvt HH	-	-	8.5	-3.1	-56.9	33.7	42.7	-7.4	-5.7
<b>TOTAL</b>	<b>-7.3</b>	<b>1.6</b>	<b>5.5</b>	<b>5.8</b>	<b>4.8</b>	<b>9.1</b>	<b>8.3</b>	<b>6.0</b>	<b>5.6</b>

**Figure 5.1.1a**  
**TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2017**



**Figure 5.1.1b**  
**TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2008–2017**



**Table & Figure 5.1.2**  
**ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 2008–2017**

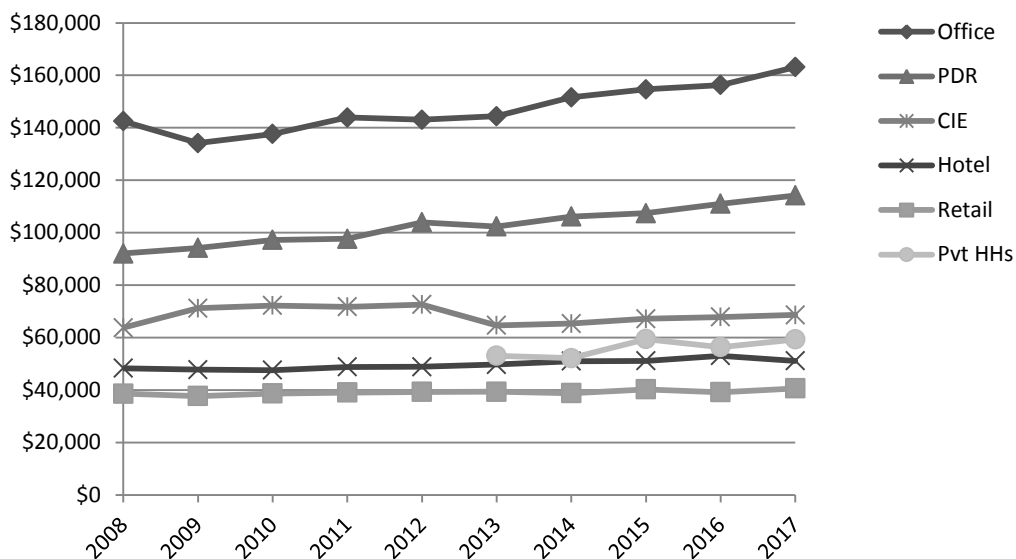
This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.2.

### Wages per Worker (2017 \$)

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$142,486	\$134,168	\$137,603	\$143,900	\$143,031	\$144,372	\$151,570	\$154,637	\$156,266	\$163,132
Retail	\$38,576	\$37,655	\$38,663	\$39,031	\$39,268	\$39,316	\$38,796	\$40,220	\$39,134	\$40,611
PDR	\$92,063	\$94,179	\$97,206	\$97,650	\$103,932	\$102,371	\$106,115	\$107,451	\$111,001	\$114,216
Hotel	\$48,325	\$47,774	\$47,579	\$48,774	\$48,825	\$49,713	\$51,003	\$51,114	\$53,027	\$51,124
CIE	\$63,734	\$71,151	\$72,220	\$71,751	\$72,588	\$64,664	\$65,347	\$67,165	\$67,813	\$68,627
Pvt HH	-	-	\$24,295	\$25,709	\$22,844	\$53,072	\$52,160	\$59,407	\$56,333	\$59,294
Average	\$93,658	\$93,567	\$95,754	\$98,645	\$95,870	\$96,114	\$100,309	\$103,179	\$104,918	\$109,003

### Percentage Change

Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-5.8	2.6	4.6	-0.6	0.9	5.0	2.0	1.1	4.4
Retail	-2.4	2.7	1.0	0.6	0.1	-1.3	3.7	-2.7	3.8
PDR	2.3	3.2	0.5	6.4	-1.5	3.7	1.3	3.3	2.9
Hotel	-1.1	-0.4	2.5	0.1	1.8	2.6	0.2	3.7	-3.6
CIE	11.6	1.5	-0.7	1.2	-10.9	1.1	2.8	1.0	1.2
Pvt HH	-	-	5.8	-11.1	132.3	-1.7	13.9	-5.2	5.3
TOTAL	-0.1	2.3	3.0	-2.8	0.3	4.4	2.9	1.7	3.9



**Note:** PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Pvt HH = Private Household employment

**Sources:** Employees from Table 3.1 of this report; Wages from Table 5.1.1 of this report

**Table 5.2.1**

This is a table of taxable sales in San Francisco for the last ten years. 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	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
All Retail Sales	\$9,804,636	\$8,511,146	\$8,971,759	\$9,939,895	\$10,883,271	\$11,869,555	\$12,633,214	\$12,725,260	\$13,222,462	\$13,352,559
All Outlets	\$14,837,689	\$12,633,575	\$13,443,121	\$14,890,527	\$15,953,605	\$17,094,163	\$18,469,729	\$18,679,679	\$19,294,636	\$19,695,158

### Inflation-Adjusted (2017 \$ 000s)

Type of Sales	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
All Retail Sales	\$12,100,220	\$10,427,676	\$10,843,464	\$11,708,795	\$12,485,176	\$13,318,037	\$13,783,256	\$13,530,001	\$13,648,410	\$13,352,559
All Outlets	\$18,311,675	\$15,478,388	\$16,247,650	\$17,540,440	\$18,301,811	\$19,180,223	\$20,151,087	\$19,860,975	\$19,916,193	\$19,695,158

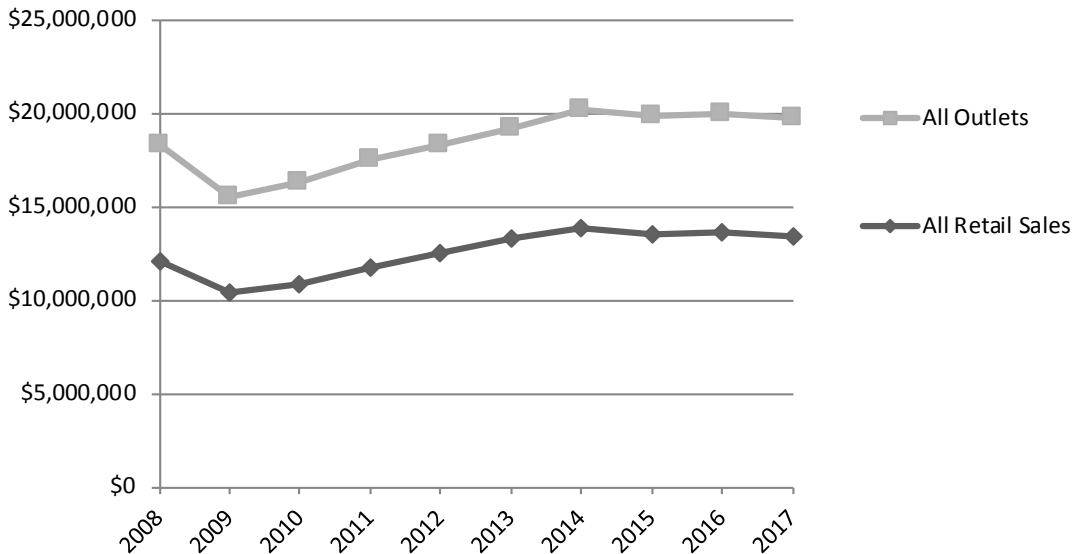
### Percentage Change

Type of Sales	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
All Retail Sales	-13.8%	4.0%	8.0%	6.6%	6.7%	3.5%	-1.8%	0.9%	-2.2%
All Outlets	-15.5%	5.0%	8.0%	4.3%	4.8%	5.1%	-1.4%	0.3%	-1.1%

#### Sources:

- California State Board of Equalization, Taxable Sales in California
- 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, 2008–2017 (2017 \$000s)**



**Table 5.2.2**  
**TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2017**

This table looks more closely at the type of retail sales that occurred in 2017, 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	3,120	\$2,059,404
General Merchandise	339	\$765,146
Food Stores	1,359	\$860,087
Eating & Drinking	5,144	\$4,691,452
Home Furnishings & Appliances	1,115	\$868,069
Building Materials	322	\$585,656
Service Stations	118	\$463,027
Automotive Dealers and Supplies	241	\$659,869
Other Retail Stores	7,961	\$2,368,488
<b>TOTAL RETAIL STORES</b>	<b>19,686</b>	<b>\$13,352,559</b>
<b>TOTAL OUTLETS</b>	<b>30,775</b>	<b>\$19,695,158</b>

**Notes:**

- 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:**

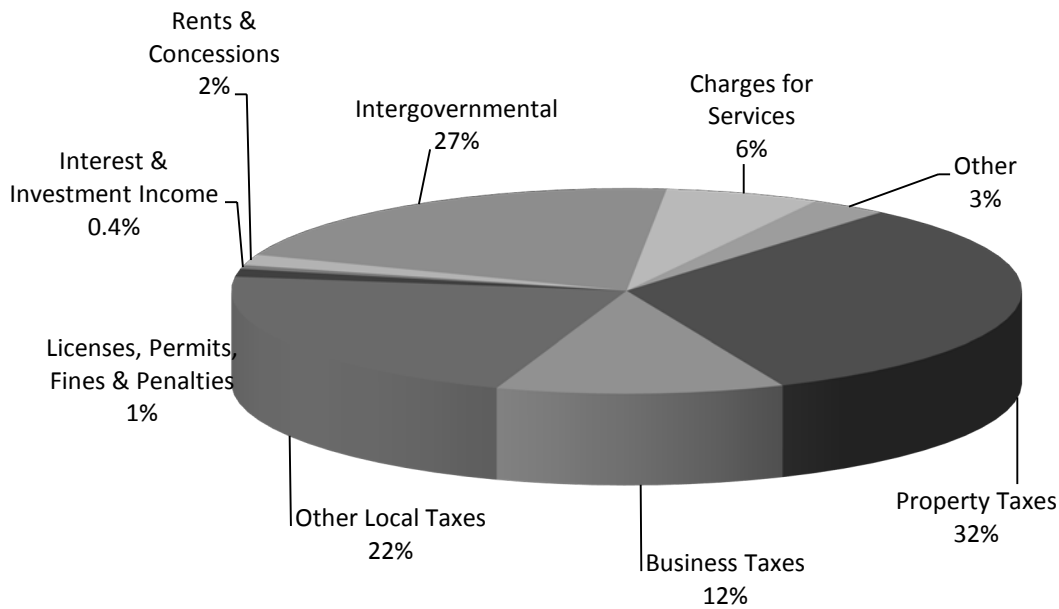
- California State Board of Equalization, Taxable Sales in California
- Additional calculations by the San Francisco Planning Department

**Table & Figure 5.3.1**

**SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2017**

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2016. This data is shown graphically in Figure 5.3.1.

<i>Revenue Source</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Property Taxes	\$1,937,694	32.4
Business Taxes	\$702,331	11.8
Other Local Taxes	\$1,305,824	21.9
Licenses, Permits, Fines & Penalties	\$75,195	1.3
Interest & Investment Income	\$35,089	0.6
Rents & Concessions	\$100,544	1.7
Intergovernmental	\$1,248,195	20.9
Federal -	\$411,369	6.9
State -	\$823,012	13.8
Other -	\$13,814	0.2
Charges for Services	\$378,437	6.3
Other	\$188,311	3.2
<b>TOTAL</b>	<b>\$5,971,620</b>	<b>100.0</b>

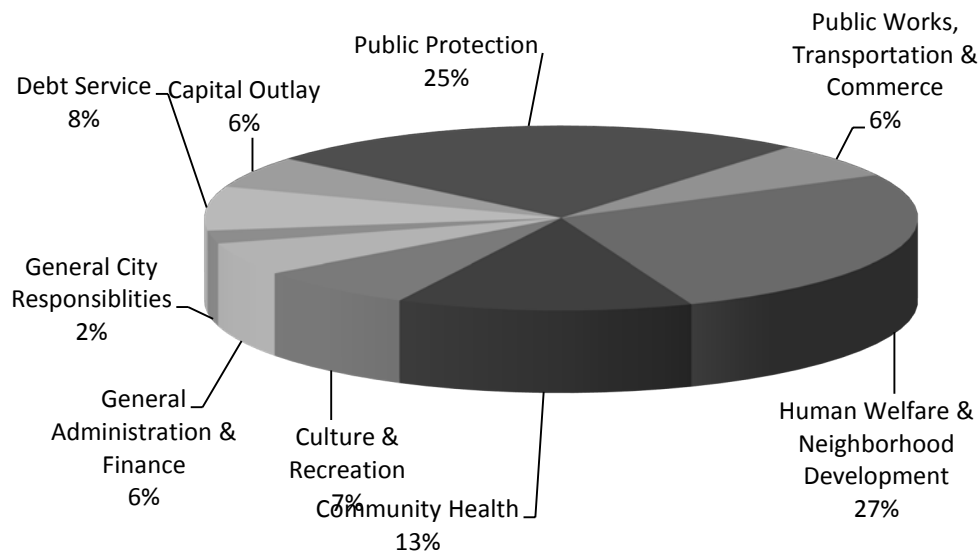


**Note:** Fiscal Year 2016 runs from July 1, 2016 to June 30, 2017  
**Source:** San Francisco Controller, Comprehensive Annual Financial Report.

**Table & Figure 5.3.2****SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2017**

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2017. This data is shown graphically in Figure 5.3.2.

<i>Expenditure Function</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Public Protection	\$1,323,577	24.9
Public Works, Transportation & Commerce	\$332,693	6.3
Human Welfare & Neighborhood Development	\$1,424,425	26.8
Community Health	\$712,495	13.4
Culture & Recreation	\$390,038	7.3
General Administration & Finance	\$303,113	5.7
General City Responsibilities	\$121,447	2.3
Debt Service	\$411,142	7.7
Capital Outlay	\$297,089	5.6
<b>TOTAL</b>	<b>\$5,316,019</b>	<b>100.00</b>



**Note:** Fiscal Year 2016 runs from July 1, 2016 to June 30, 2017

**Source:** San Francisco Controller, Comprehensive Annual Financial Report.





# 6.0 Building and Land Use

The tables and graphs in this chapter present information about building permit applications for the past decade, as well as land use data. 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, which accounts for approximately 20% of employment annually over the past 10 years. 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 sub-sections, 6.1 through 6.5 as follows: (1) All Permits & Costs by Land Use District (10 years); (2) All Permits & Costs by C&I District (10 years); (3) All Permits & Costs by C&I District and Land Use Categories (current year); (4) Permit Status by C&I District and Land Use Categories (current year); (5) Total Office Space (10 years).

**Sections 6.1 and 6.2.** Data are reported by the year that a project was filed with the Department of Building Inspection. Although all filed applications may not ultimately lead to completed projects, trends in the number of building permit applications filed are an important economic indicator. Construction activity and spending is a gauge of business confidence. Economic health is measured, among other things, by housing starts. Residential construction often leads commercial activity by about a year. Construction activity and its attendant costs generate jobs and wages, which in turn stimulate spending and consumption throughout the local economy.

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 Appendix Chapter 1.

Tables in these sections are subdivided into three groups: (1) all building permits, (2) building permits for new construction activity, and (3) 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 the current year is designated as the base year.

**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 the current year.

**Section 6.4** describes permit applications by application status by Land Use Category and then by C&I District for 2014. These permit status categories are grouped into the following five major categories: (1) building permit applications that were *approved* for construction but not yet issued; (2) building permit applications that were *issued* but not completed; (3) *other* permit applications, which includes those that were not yet been acted upon, that were abandoned, reinstated, appealed, or for which no information was available; (4) building permit applications that were *cancelled*, including applications that have been withdrawn, revoked or disapproved; (5) building permit applications where the authorized work was *completed*.

The construction cost data reported in some tables are project cost estimates as reported by DBI, but are more usefully understood as estimates of construction expenditure or spending in the local and wider economy for each project. Hence, it's a measure of the size of the construction sector of the economy. Total and average construction cost data measure the scope, complexity, and extent of construction activity in San Francisco. While total construction cost indicates the extent of active permit applications, some of which are under construction in San Francisco for a particular year, average construction cost relates number of applications to total construction cost, revealing a rough estimate of project size. Construction cost data 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 2004 to 2014. It includes absolute numbers as well as percentage changes over time. The source of these data is Cushman & Wakefield realtors.

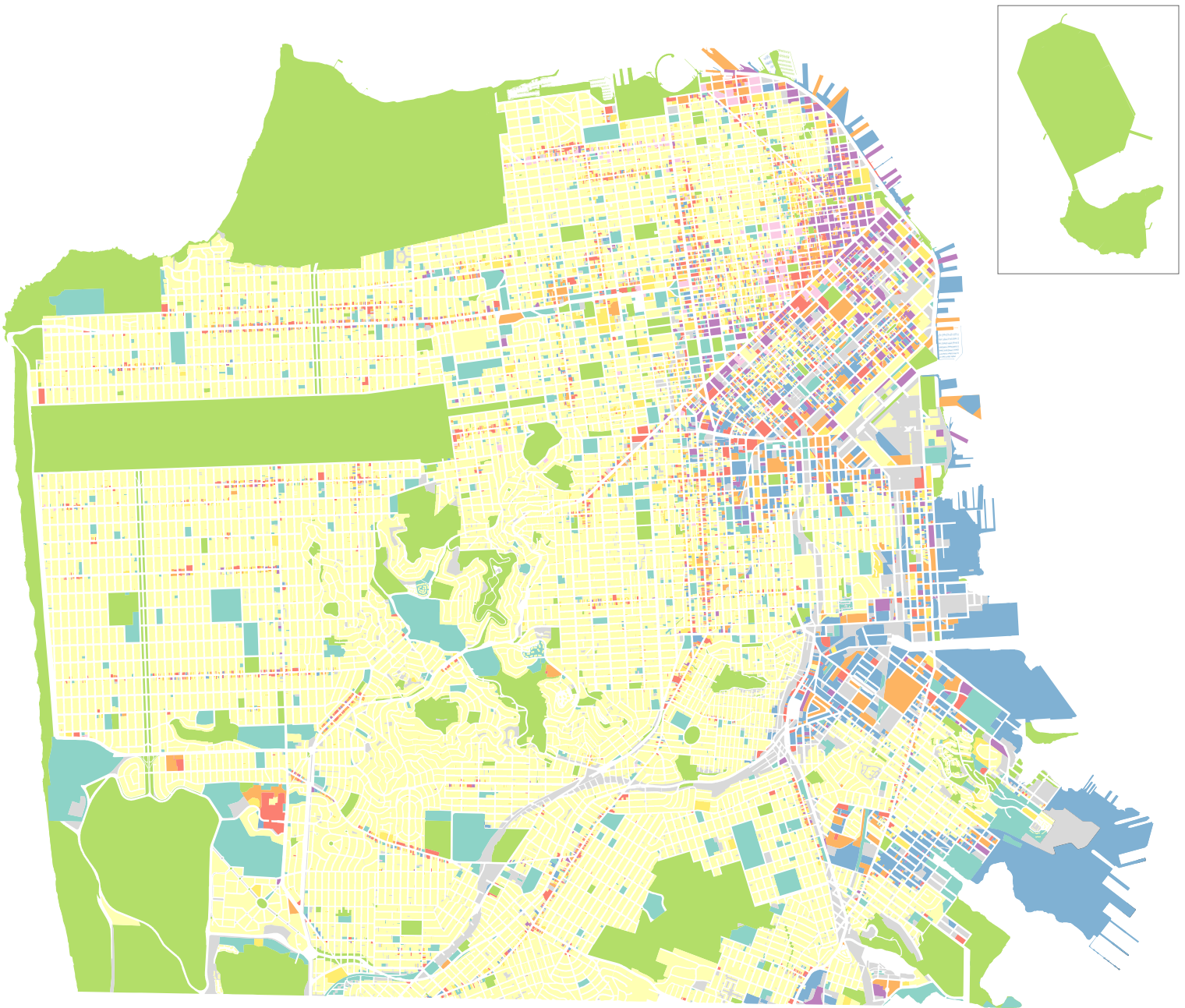
## 6.2 LAND USE

**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 that 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 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.

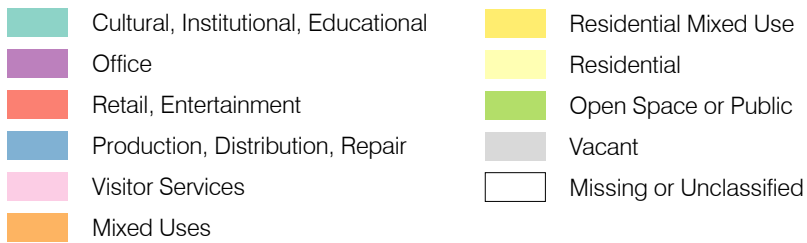
The NAICS code for land uses under Office, Retail, PDR, Hotel, and Cultural/Institutional/ Educational (CIE) land use categories are noted in *Table 1.2*, Chapter 1. The Residential land use category data are gathered from Housing Inventory and the Department of Building Inspection's Permit Tracking System. Data on vacant sites are gathered from information supplied by the Assessor's Office. *Table 6.6* provides details on the amount of square footage (building footprint, not total) for each land use, as a predominant use on each parcel of land for 20 plan areas in San Francisco. *Map 6.2* shows the location of these 20 plan areas. *Table 6.6* is based on the information available in year 2016.





## Land Use San Francisco

**MAP 6.1**



**Table 6.1.1.A**  
**ALL BUILDING PERMITS BY LAND USE CATEGORY, 2008–2017**

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	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	3,791	2,907	2,968	3,406	3,712	4,410	4,465	4,981	4,679	4,275
Retail	1,927	2,203	1,967	2,178	2,442	2,337	2,209	2,222	2,191	2,015
PDR	235	236	205	248	231	283	306	371	324	396
Hotel	310	260	126	198	224	249	285	355	310	327
CIE	602	547	494	541	614	696	702	697	741	685
Residential	18,226	15,714	15,533	15,288	15,876	17,800	18,900	20,198	19,537	20,850
Other	819	600	631	754	1,196	1,227	1,304	987	970	986
<b>TOTAL</b>	<b>25,910</b>	<b>22,467</b>	<b>21,924</b>	<b>22,613</b>	<b>24,295</b>	<b>27,002</b>	<b>28,171</b>	<b>29,811</b>	<b>28,752</b>	<b>29,534</b>

#### Annual Percentage Distribution

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	14.6	12.9	13.5	15.1	15.3	16.3	15.8	16.7	16.3	14.5
Retail	7.4	9.8	9.0	9.6	10.1	8.7	7.8	7.5	7.6	6.8
PDR	0.9	1.1	0.9	1.1	1.0	1.0	1.1	1.2	1.1	1.3
Hotel	1.2	1.2	0.6	0.9	0.9	0.9	1.0	1.2	1.1	1.1
CIE	2.3	2.4	2.3	2.4	2.5	2.6	2.5	2.3	2.6	2.3
Residential	70.3	69.9	70.8	67.6	65.3	65.9	67.1	67.8	68.0	70.6
Other	3.2	2.7	2.9	3.3	4.9	4.5	4.6	3.3	3.4	3.3
<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

Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-23.3	2.1	14.8	9.0	18.8	1.2	11.6	-6.1	-8.6
Retail	14.3	-10.7	10.7	12.1	-4.3	-5.5	0.6	-1.4	-8.0
PDR	0.4	-13.1	21.0	-6.9	22.5	8.1	21.2	-12.7	22.2
Hotel	-16.1	-51.5	57.1	13.1	11.2	14.5	24.6	-12.7	5.5
CIE	-9.1	-9.7	9.5	13.5	13.4	0.9	-0.7	6.3	-7.6
Residential	-13.8	-1.2	-1.6	3.8	12.1	6.2	6.9	-3.3	6.7
Other	-26.7	5.2	19.5	58.6	2.6	6.3	-24.3	-1.7	1.6
<b>TOTAL</b>	<b>-13.3</b>	<b>-2.4</b>	<b>3.1</b>	<b>7.4</b>	<b>11.1</b>	<b>4.3</b>	<b>5.8</b>	<b>-3.6</b>	<b>2.7</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, 2008–2017**

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 2017 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 2017 \$ 000s)**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$581,984	\$342,627	\$449,744	\$982,163	\$852,554	\$1,400,446	\$1,168,115	\$1,634,982	\$1,000,696	\$1,086,257
Retail	\$205,483	\$110,938	\$206,788	\$179,724	\$338,900	\$216,091	\$156,987	\$448,275	\$219,725	\$207,056
PDR	\$32,608	\$27,655	\$14,845	\$19,643	\$20,329	\$37,595	\$97,063	\$62,604	\$85,501	\$59,969
Hotel	\$47,926	\$31,109	\$23,977	\$61,277	\$36,232	\$126,892	\$62,877	\$156,190	\$263,632	\$53,179
CIE	\$144,106	\$97,444	\$158,221	\$199,197	\$223,507	\$169,813	\$404,167	\$140,409	\$983,560	\$168,001
Residential	\$976,420	\$807,031	\$1,213,213	\$1,218,621	\$2,322,150	\$2,924,599	\$2,799,236	\$3,744,571	\$3,932,195	\$2,170,417
Other	\$14,844	\$10,070	\$9,844	\$18,003	\$461,465	-\$113,347	\$58,628	\$109,898	\$141,656	\$87,382
<b>TOTAL</b>	<b>\$2,003,372</b>	<b>\$1,426,874</b>	<b>\$2,076,633</b>	<b>\$2,678,628</b>	<b>\$4,255,137</b>	<b>\$4,762,089</b>	<b>\$4,747,071</b>	<b>\$6,296,927</b>	<b>\$6,626,966</b>	<b>\$3,832,262</b>

**Annual Percentage Distribution**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	29.1	24.0	21.7	36.7	20.0	29.4	24.6	26.0	15.1	28.3
Retail	10.3	7.8	10.0	6.7	8.0	4.5	3.3	7.1	3.3	5.4
PDR	1.6	1.9	0.7	0.7	0.5	0.8	2.0	1.0	1.3	1.6
Hotel	7.2	6.8	7.6	7.4	5.3	3.6	8.5	2.2	14.8	1.4
CIE	2.4	2.2	1.2	2.3	0.9	2.7	1.3	2.5	4.0	4.4
Residential	48.7	56.6	58.4	45.5	54.6	61.4	59.0	59.5	59.3	56.6
Other	0.7	0.7	0.5	0.7	10.8	-2.4	1.2	1.7	2.1	2.3
<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**

Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-41.1	31.3	118.4	-13.2	64.3	-16.6	40.0	-38.8	8.6
Retail	-46.0	86.4	-13.1	88.6	-36.2	-27.4	185.5	-51.0	-5.8
PDR	-15.2	-46.3	32.3	3.5	84.9	158.2	-35.5	36.6	-29.9
Hotel	-32.4	62.4	25.9	12.2	-24.0	138.0	-65.3	600.5	-79.8
CIE	-35.1	-22.9	155.6	-40.9	250.2	-50.4	148.4	68.8	-82.9
Residential	-17.3	50.3	0.4	90.6	25.9	-4.3	33.8	5.0	-44.8
Other	-32.2	-2.2	82.9	2463.2	-124.6	-151.7	87.4	28.9	-38.3
<b>TOTAL</b>	<b>-28.8</b>	<b>45.5</b>	<b>29.0</b>	<b>58.9</b>	<b>11.9</b>	<b>-0.3</b>	<b>32.6</b>	<b>5.2</b>	<b>-42.2</b>

**Notes:** PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational

**Sources:** San Francisco Planning Department; Department of Building Inspection

1. The large increase in 'Other' construction spending in 2011 is due to permits filed for the Transbay Terminal, a transportation facility.



**Table 6.1.1.C****AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 2008–2017**

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.B) divided by the total permits (Table 6.1.1.A).

**Average Construction Costs (Inflation-Adjusted 2017 \$ 000s)**

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$153.5	\$117.9	\$151.5	\$288.4	\$229.7	\$317.6	\$261.6	\$328.2	\$213.9	\$254.1
Retail	\$106.6	\$50.4	\$105.1	\$82.5	\$138.8	\$92.5	\$71.1	\$201.7	\$100.3	\$102.8
PDR	\$138.8	\$117.2	\$72.4	\$79.2	\$88.0	\$132.8	\$317.2	\$168.7	\$263.9	\$151.4
Hotel	\$154.6	\$119.6	\$190.3	\$309.5	\$161.7	\$509.6	\$220.6	\$440.0	\$850.4	\$162.6
CIE	\$239.4	\$178.1	\$320.3	\$368.2	\$364.0	\$244.0	\$575.7	\$201.4	\$1,327.3	\$245.3
Residential	\$53.6	\$51.4	\$78.1	\$79.7	\$146.3	\$164.3	\$148.1	\$185.4	\$201.3	\$104.1
Other	\$18.1	\$16.8	\$15.6	\$23.9	\$385.8	-\$92.4	\$45.0	\$111.3	\$146.0	\$88.6
Average	\$77.3	\$63.5	\$94.7	\$118.5	\$175.1	\$176.4	\$168.5	\$211.2	\$230.5	\$129.8

**Percentage Change**

<i>Land Use Category</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-23.2	28.6	90.3	-20.4	38.3	-17.6	25.5	-34.8	18.8
Retail	-52.8	108.8	-21.5	68.2	-33.4	-23.1	183.9	-50.3	2.5
PDR	-15.6	-38.2	9.4	11.1	50.9	138.8	-46.8	56.4	-42.6
Hotel	-22.6	59.0	62.6	-47.7	215.1	-56.7	99.4	93.3	-80.9
CIE	-25.6	79.8	15.0	-1.1	-33.0	136.0	-65.0	558.9	-81.5
Residential	-4.1	52.1	2.1	83.5	12.3	-9.9	25.2	8.6	-48.3
Other	-7.4	-7.0	53.0	1515.9	-123.9	-148.7	147.7	31.2	-39.3
TOTAL	-17.9	49.1	25.1	47.9	0.7	-4.5	25.4	9.1	-43.7

**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, 2008–2017**

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**

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	9	0	1	8	9	8	7	11	6	5
Retail	5	6	10	9	10	8	10	12	10	6
PDR	13	4	5	5	5	9	7	9	4	5
Hotel	0	0	0	1	0	2	1	2	4	0
CIE	5	5	8	3	10	10	5	9	9	4
Residential	101	63	92	58	148	155	225	268	164	107
Other	0	3	0	9	17	9	5	0	1	0
<b>TOTAL</b>	<b>133</b>	<b>81</b>	<b>116</b>	<b>93</b>	<b>199</b>	<b>201</b>	<b>260</b>	<b>311</b>	<b>198</b>	<b>127</b>

**Annual Percentage Distribution**

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	6.8	0.0	0.9	8.6	4.5	4.0	2.7	3.5	3.0	3.9
Retail	3.8	7.4	8.6	9.7	5.0	4.0	3.8	3.9	5.1	4.7
PDR	9.8	4.9	4.3	5.4	2.5	4.5	2.7	2.9	2.0	3.9
Hotel	0.0	0.0	0.0	1.1	0.0	1.0	0.4	0.6	2.0	0.0
CIE	3.8	6.2	6.9	3.2	5.0	5.0	1.9	2.9	4.5	3.1
Residential	75.9	77.8	79.3	62.4	74.4	77.1	86.5	86.2	82.8	84.3
Other	0.0	3.7	0.0	9.7	8.5	4.5	1.9	0.0	0.5	0.0
<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**

<i>Land Use Category</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-100.0	--	700.0	12.5	-11.1	-12.5	57.1	-45.5	-16.7
Retail	20.0	66.7	-10.0	11.1	-20.0	25.0	20.0	-16.7	-40.0
PDR	-69.2	25.0	0.0	0.0	80.0	-22.2	28.6	-55.6	25.0
Hotel	--	--	--	-100.0	--	-50.0	100.0	100.0	-100.0
CIE	0.0	60.0	-62.5	233.3	0.0	-50.0	80.0	0.0	-55.6
Residential	-37.6	46.0	-37.0	155.2	4.7	45.2	19.1	-38.8	-34.8
Other	--	-100.0	--	88.9	-47.1	-44.4	-100.0	--	--
<b>TOTAL</b>	<b>-39.1</b>	<b>43.2</b>	<b>-19.8</b>	<b>114.0</b>	<b>1.0</b>	<b>29.4</b>	<b>19.6</b>	<b>-36.3</b>	<b>-35.9</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 (Inflation-Adjusted 2017 \$ 000s)**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$127,236	\$0	\$4,535	\$471,117	\$128,532	\$491,044	\$300,151	\$554,498	\$202,040	\$147,108
Retail	\$69,445	\$5,005	\$74,338	\$11,585	\$87,906	\$4,706	\$9,219	\$214,058	\$26,971	\$12,265
PDR	\$14,750	\$2,270	\$697	\$837	\$689	\$21,023	\$66,880	\$8,461	\$1,451	\$4,029
Hotel	\$0	\$0	\$0	\$30,306	\$0	\$56,037	\$0	\$101,558	\$193,509	\$0
CIE	\$27,958	\$26,498	\$73,471	\$15,233	\$13,200	\$30,759	\$3,751	\$35,497	\$948,046	\$25,595
Residential	\$274,237	\$273,180	\$645,448	\$735,722	\$1,658,830	\$1,727,873	\$1,957,208	\$2,327,142	\$3,012,769	\$1,204,006
Other	\$0	\$23	\$0	\$0	\$250,885	\$342	\$0	\$0	\$15,405	\$0
<b>TOTAL</b>	<b>\$513,626</b>	<b>\$306,976</b>	<b>\$798,488</b>	<b>\$1,264,800</b>	<b>\$2,140,042</b>	<b>\$2,331,783</b>	<b>\$2,337,210</b>	<b>\$3,241,214</b>	<b>\$4,300,191</b>	<b>\$1,393,004</b>

**Annual Percentage Distribution**

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	24.8	0.0	0.6	37.2	6.0	21.1	12.8	17.1	4.7	10.6
Retail	13.5	1.6	9.3	0.9	4.1	0.2	0.4	6.6	0.6	0.9
PDR	2.9	0.7	0.1	0.1	0.0	0.9	2.9	0.3	0.0	0.3
Hotel	0.0	0.0	0.0	2.4	0.0	2.4	0.0	3.1	4.5	0.0
CIE	5.4	8.6	9.2	1.2	0.6	1.3	0.2	1.1	19.7	1.8
Residential	53.4	89.0	80.8	58.2	77.5	74.1	83.7	71.8	70.1	86.4
Other	0.0	0.0	0.0	0.0	11.7	0.0	0.0	0.0	0.4	0.0
<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**

Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	--	--	10,288.0	-72.7	282.0	-38.9	84.7	-63.6	-27.2
Retail	-92.8	1,385.4	-84.4	658.8	-94.6	95.9	2,221.8	-87.4	-54.5
PDR	-84.6	-69.3	20.2	-17.6	2,949.1	218.1	-87.3	-82.9	177.7
Hotel	--	--	--	--	--	--	--	90.5	-100.0
CIE	-5.2	177.3	-79.3	-13.3	133.0	-87.8	846.4	2,289.1	-97.0
Residential	-0.4	136.3	14.0	125.5	4.2	13.3	18.9	29.5	-60.0
Other	--	--	--	--	--	--	--	--	-100.0
<b>TOTAL</b>	<b>-40.2</b>	<b>160.1</b>	<b>58.4</b>	<b>69.2</b>	<b>9.0</b>	<b>0.2</b>	<b>38.7</b>	<b>32.7</b>	<b>-67.6</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, 2008–2017**

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.B) divided by the total permits (Table 6.1.2.A).

Land Use Category	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$14,137	--	\$4,535	\$58,890	\$14,281	\$61,381	\$42,879	\$50,409	\$33,673	\$29,422
Retail	\$13,889	\$834	\$7,434	\$1,287	\$8,791	\$588	\$922	\$17,838	\$2,697	\$2,044
PDR	\$1,135	\$568	\$139	\$167	\$138	\$2,336	\$9,554	\$940	\$363	\$806
Hotel	--	--	--	\$30,306	--	\$28,018	\$0	\$50,779	\$48,377	--
CIE	\$5,592	\$5,300	\$9,184	\$5,078	\$1,320	\$3,076	\$750	\$3,944	\$94,227	\$6,399
Residential	\$2,715	\$4,336	\$7,016	\$12,685	\$11,208	\$11,148	\$8,699	\$8,683	\$18,371	\$11,252
Other	--	\$8	--	\$0	\$14,758	\$38	\$0	--	\$15,405	--
<b>TOTAL</b>	<b>\$3,862</b>	<b>\$3,790</b>	<b>\$6,884</b>	<b>\$13,600</b>	<b>\$10,754</b>	<b>\$11,601</b>	<b>\$8,989</b>	<b>\$10,422</b>	<b>\$21,718</b>	<b>\$10,969</b>

Land Use Category	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	--	--	1,198.5	-75.7	329.8	-30.1	17.6	-33.2	-12.6
Retail	-94.0	791.2	-82.7	582.9	-93.3	56.7	1,834.9	-84.9	-24.2
PDR	-50.0	-75.5	20.2	-17.6	1,593.9	309.0	-90.2	-61.4	122.1
Hotel	--	--	--	--	--	-100.0	--	-4.7	--
CIE	-5.2	73.3	-44.7	-74.0	133.0	-75.6	425.8	2,289.1	-93.2
Residential	59.7	61.8	80.8	-11.6	-0.5	-22.0	-0.2	111.6	-38.7
Other	--	--	--	--	-99.7	-100.0	--	--	--
<b>TOTAL</b>	<b>-1.9</b>	<b>81.6</b>	<b>97.6</b>	<b>-20.9</b>	<b>7.9</b>	<b>-22.5</b>	<b>15.9</b>	<b>108.4</b>	<b>-49.5</b>

**Percentage Change**

**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, 2008–2017**

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

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	3,782	2,907	2,967	3,398	3,704	4,402	4,458	4,970	4,682	4,270
Retail	1,922	2,197	1,955	2,168	2,432	2,329	2,199	2,210	2,188	2,009
PDR	222	232	200	243	226	274	299	362	323	391
Hotel	310	260	126	197	224	247	284	353	306	327
CIE	597	542	486	538	605	686	697	688	737	681
Residential	18,125	15,651	15,441	15,230	15,728	17,645	18,675	19,930	19,508	20,743
Other	270	218	212	271	330	462	580	353	488	346
<b>TOTAL</b>	<b>25,228</b>	<b>22,007</b>	<b>21,387</b>	<b>22,045</b>	<b>23,249</b>	<b>26,045</b>	<b>27,192</b>	<b>28,866</b>	<b>28,232</b>	<b>28,767</b>

### Annual Percentage Distribution

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	15.0	13.2	13.9	15.4	15.9	16.9	16.4	17.2	16.6	14.8
Retail	7.6	10.0	9.1	9.8	10.5	8.9	8.1	7.7	7.8	7.0
PDR	0.9	1.1	0.9	1.1	1.0	1.1	1.1	1.3	1.1	1.4
Hotel	1.2	1.2	0.6	0.9	1.0	0.9	1.0	1.2	1.1	1.1
CIE	2.4	2.5	2.3	2.4	2.6	2.6	2.6	2.4	2.6	2.4
Residential	71.8	71.1	72.2	69.1	67.7	67.7	68.7	69.0	69.1	72.1
Other	1.1	1.0	1.0	1.2	1.4	1.8	2.1	1.2	1.7	1.2
<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

<i>Land Use Category</i>	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Office	-23.1	2.1	14.5	9.0	18.8	1.3	11.5	-5.8	-8.8
Retail	14.3	-11.0	10.9	12.2	-4.2	-5.6	0.5	-1.0	-8.2
PDR	4.5	-13.8	21.5	-7.0	21.2	9.1	21.1	-10.8	21.1
Hotel	-16.1	-51.5	56.3	13.7	10.3	15.0	24.3	-13.3	6.9
CIE	-9.2	-10.3	10.7	12.5	13.4	1.6	-1.3	7.1	-7.6
Residential	-13.6	-1.3	-1.4	3.3	12.2	5.8	6.7	-2.1	6.3
Other	-19.3	-2.8	27.8	21.8	40.0	25.5	-39.1	38.2	-29.1
<b>TOTAL</b>	<b>-12.8</b>	<b>-2.8</b>	<b>3.1</b>	<b>5.5</b>	<b>12.0</b>	<b>4.4</b>	<b>6.2</b>	<b>-2.2</b>	<b>1.9</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, 2008–2017**

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 2016 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 2017 \$ 000s)**

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$454,748	\$342,627	\$445,208	\$511,046	\$724,022	\$909,401	\$867,963	\$1,080,484	\$798,657	\$939,148
Retail	\$136,039	\$105,934	\$132,446	\$168,138	\$250,995	\$211,386	\$147,768	\$234,217	\$192,754	\$194,791
PDR	\$17,859	\$25,384	\$14,149	\$18,805	\$19,640	\$16,571	\$30,182	\$54,142	\$84,050	\$55,940
Hotel	\$47,926	\$31,109	\$23,977	\$30,971	\$36,232	\$70,855	\$62,877	\$54,632	\$70,123	\$53,179
CIE	\$116,148	\$70,947	\$84,751	\$183,964	\$210,307	\$139,054	\$400,416	\$104,912	\$135,514	\$142,406
Residential	\$702,182	\$533,851	\$567,766	\$482,899	\$663,320	\$1,196,727	\$842,028	\$1,417,429	\$919,426	\$966,411
Other	\$7,478	\$5,240	\$3,505	\$11,531	\$182,436	\$71,495	\$37,007	\$86,646	\$112,495	\$65,829
<b>TOTAL</b>	<b>\$1,482,380</b>	<b>\$1,115,092</b>	<b>\$1,271,802</b>	<b>\$1,407,354</b>	<b>\$2,086,952</b>	<b>\$2,615,489</b>	<b>\$2,388,241</b>	<b>\$3,032,462</b>	<b>\$2,313,019</b>	<b>\$2,417,704</b>

**Annual Percentage Distribution**

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	30.7	30.7	35.0	36.3	34.7	34.8	36.3	35.6	34.5	38.8
Retail	9.2	9.5	10.4	11.9	12.0	8.1	6.2	7.7	8.3	8.1
PDR	1.2	2.3	1.1	1.3	0.9	0.6	1.3	1.8	3.6	2.3
Hotel	3.2	2.8	1.9	2.2	1.7	2.7	2.6	1.8	3.0	2.2
CIE	7.8	6.4	6.7	13.1	10.1	5.3	16.8	3.5	5.9	5.9
Residential	47.4	47.9	44.6	34.3	31.8	45.8	35.3	46.7	39.8	40.0
Other	0.5	0.5	0.3	0.8	8.7	2.7	1.5	2.9	4.9	2.7
<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**

<i>Land Use Category</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-24.7	29.9	14.8	41.7	25.6	-4.6	24.5	-26.1	17.6
Retail	-22.1	25.0	26.9	49.3	-15.8	-30.1	58.5	-17.7	1.1
PDR	42.1	-44.3	32.9	4.4	-15.6	82.1	79.4	55.2	-33.4
Hotel	-35.1	-22.9	29.2	17.0	95.6	-11.3	-13.1	28.4	-24.2
CIE	-38.9	19.5	117.1	14.3	-33.9	188.0	-73.8	29.2	5.1
Residential	-24.0	6.4	-14.9	37.4	80.4	-29.6	68.3	-35.1	5.1
Other	-29.9	-33.1	229.0	1482.1	-60.8	-48.2	134.1	29.8	-41.5
<b>TOTAL</b>	<b>-24.8</b>	<b>14.1</b>	<b>10.7</b>	<b>48.3</b>	<b>25.3</b>	<b>-8.7</b>	<b>27.0</b>	<b>-23.7</b>	<b>4.5</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, 2008–2017**

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.B) divided by the total permits (Table 6.1.3.A).

**Average Construction Costs (Inflation-Adjusted 2016 \$ 000s)**

<i>Land Use Category</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Office	\$120.2	\$117.9	\$150.1	\$150.4	\$195.5	\$206.6	\$194.7	\$217.4	\$170.6	\$219.9
Retail	\$70.8	\$48.2	\$67.7	\$77.6	\$103.2	\$90.8	\$67.2	\$106.0	\$88.1	\$97.0
PDR	\$80.4	\$109.4	\$70.7	\$77.4	\$86.9	\$60.5	\$100.9	\$149.6	\$260.2	\$143.1
Hotel	\$154.6	\$119.7	\$190.3	\$157.2	\$161.8	\$286.9	\$221.4	\$154.8	\$229.2	\$162.6
CIE	\$194.6	\$130.9	\$174.4	\$341.9	\$347.6	\$202.7	\$574.5	\$152.5	\$183.9	\$209.1
Residential	\$38.7	\$34.1	\$36.8	\$31.7	\$42.2	\$67.8	\$45.1	\$71.1	\$47.1	\$46.6
Other	\$27.7	\$24.0	\$16.5	\$42.5	\$552.8	\$154.8	\$63.8	\$245.5	\$230.5	\$190.3
<b>TOTAL</b>	<b>\$58.8</b>	<b>\$50.7</b>	<b>\$59.5</b>	<b>\$63.8</b>	<b>\$89.8</b>	<b>\$100.4</b>	<b>\$87.8</b>	<b>\$105.1</b>	<b>\$81.9</b>	<b>\$84.0</b>

**Percentage Change**

<i>Land Use Category</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Office	-2.0	27.3	0.2	30.0	5.7	-5.8	11.7	-21.5	28.9
Retail	-31.9	40.5	14.5	33.1	-12.1	-26.0	57.7	-16.9	10.1
PDR	36.0	-35.3	9.4	12.3	-30.4	66.9	48.2	74.0	-45.0
Hotel	-22.6	59.0	-17.4	2.9	77.3	-22.8	-30.1	48.1	-29.0
CIE	-32.7	33.2	96.1	1.7	-41.7	183.4	-73.5	20.6	13.7
Residential	-12.0	7.8	-13.8	33.0	60.8	-33.5	57.7	-33.7	-1.1
Other	-13.2	-31.2	157.4	1199.3	-72.0	-58.8	284.7	-6.1	-17.5
<b>TOTAL</b>	<b>-13.8</b>	<b>17.4</b>	<b>7.4</b>	<b>40.6</b>	<b>11.9</b>	<b>-12.5</b>	<b>19.6</b>	<b>-22.0</b>	<b>2.6</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, 2008–2017**

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**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	633	554	572	599	663	691	680	854	752	869
Civic Center	899	751	710	781	793	1,062	1,157	1,148	1,173	1,085
Financial	3,370	2,688	2,600	2,994	3,443	3,668	3,635	4,214	4,065	3,757
Mission	1,972	1,781	1,894	1,821	1,880	2,068	2,233	2,326	2,314	2,392
North Beach	832	713	649	730	709	918	872	963	920	859
North Central	3,506	3,202	2,981	2,916	3,221	3,493	3,675	3,984	3,972	4,249
Northwest	2,478	1,897	1,904	1,936	1,953	2,118	2,372	2,545	2,474	2,698
South of Market	2,263	2,072	1,969	2,131	2,481	2,913	3,056	3,019	2,907	2,792
Southwest	8,656	7,582	7,550	7,368	7,656	8,377	8,541	9,181	8,697	9,190
Van Ness	1,186	987	1,064	1,108	1,254	1,396	1,534	1,542	1,457	1,621
Unclassified	91	232	185	221	243	298	416	34	21	22
<b>TOTAL</b>	<b>25,886</b>	<b>22,459</b>	<b>22,078</b>	<b>22,605</b>	<b>24,296</b>	<b>27,002</b>	<b>28,171</b>	<b>29,810</b>	<b>28,752</b>	<b>29,534</b>

**Annual Percentage Distribution**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	2.4	2.5	2.6	2.6	2.7	2.6	2.4	2.9	2.6	2.9
Civic Center	3.5	3.3	3.2	3.5	3.3	3.9	4.1	3.9	4.1	3.7
Financial	13.0	12.0	11.8	13.2	14.2	13.6	12.9	14.1	14.1	12.7
Mission	7.6	7.9	8.6	8.1	7.7	7.7	7.9	7.8	8.0	8.1
North Beach	3.2	3.2	2.9	3.2	2.9	3.4	3.1	3.2	3.2	2.9
North Central	13.5	14.3	13.5	12.9	13.3	12.9	13.0	13.4	13.8	14.4
Northwest	9.6	8.4	8.6	8.6	8.0	7.8	8.4	8.5	8.6	9.1
South of Market	8.7	9.2	8.9	9.4	10.2	10.8	10.8	10.1	10.1	9.5
Southwest	33.4	33.8	34.2	32.6	31.5	31.0	30.3	30.8	30.2	31.1
Van Ness	4.6	4.4	4.8	4.9	5.2	5.2	5.4	5.2	5.1	5.5
Unclassified	0.4	1.0	0.8	1.0	1.0	1.1	1.5	0.1	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**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	-12.5	3.2	4.7	10.7	4.2	-1.6	25.6	-11.9	15.6
Civic Center	-16.5	-5.5	10.0	1.5	33.9	8.9	-0.8	2.2	-7.5
Financial	-20.2	-3.3	15.2	15.0	6.5	-0.9	15.9	-3.5	-7.6
Mission	-9.7	6.3	-3.9	3.2	10.0	8.0	4.2	-0.5	3.4
North Beach	-14.3	-9.0	12.5	-2.9	29.5	-5.0	10.4	-4.5	-6.6
North Central	-8.7	-6.9	-2.2	10.5	8.4	5.2	8.4	-0.3	7.0
Northwest	-23.4	0.4	1.7	0.9	8.4	12.0	7.3	-2.8	9.1
South of Market	-8.4	-5.0	8.2	16.4	17.4	4.9	-1.2	-3.7	-4.0
Southwest	-12.4	-0.4	-2.4	3.9	9.4	2.0	7.5	-5.3	5.7
Van Ness	-16.8	7.8	4.1	13.2	11.3	9.9	0.5	-5.5	11.3
Unclassified	154.9	-20.3	19.5	10.0	22.6	39.6	-91.8	-38.2	4.8
<b>TOTAL</b>	<b>-13.2</b>	<b>-1.7</b>	<b>2.4</b>	<b>7.5</b>	<b>11.1</b>	<b>4.3</b>	<b>5.8</b>	<b>-3.5</b>	<b>2.7</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, 2008–2017**

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 2017 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 2017 \$ 000s)**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	\$26,645	\$159,922	\$50,556	\$38,571	\$81,487	\$197,307	\$349,674	\$227,231	\$282,027	\$275,938
Civic Center	\$98,340	\$65,887	\$174,575	\$96,573	\$741,712	\$379,284	\$343,081	\$273,363	\$557,343	\$400,042
Financial	\$541,232	\$299,371	\$600,497	\$523,205	\$1,227,732	\$1,375,020	\$1,176,734	\$1,608,160	\$1,166,890	\$706,493
Mission	\$65,226	\$58,243	\$77,215	\$82,840	\$79,159	\$176,362	\$197,176	\$357,247	\$331,148	\$267,085
North Beach	\$72,843	\$43,468	\$38,100	\$45,023	\$32,725	\$70,938	\$74,102	\$145,918	\$64,280	\$55,290
North Central	\$243,657	\$124,936	\$176,335	\$147,513	\$377,483	\$296,062	\$210,747	\$420,347	\$257,467	\$274,212
Northwest	\$132,331	\$67,384	\$83,777	\$73,100	\$96,590	\$107,938	\$133,281	\$133,003	\$203,586	\$176,830
South of Market	\$407,554	\$230,532	\$497,917	\$1,184,341	\$1,113,661	\$1,662,305	\$1,685,415	\$1,871,292	\$2,475,735	\$903,940
Southwest	\$340,917	\$319,858	\$322,485	\$249,560	\$352,345	\$480,700	\$457,430	\$1,114,793	\$880,724	\$640,120
Van Ness	\$73,087	\$57,140	\$54,727	\$236,890	\$152,139	\$234,572	\$119,111	\$141,057	\$391,363	\$125,706
Unclassified	\$1,542	\$134	\$451	\$1,014	\$105	\$1,600	\$318	\$4,516	\$16,404	\$6,606
<b>TOTAL</b>	<b>\$2,003,374</b>	<b>\$1,426,875</b>	<b>\$2,076,635</b>	<b>\$2,678,630</b>	<b>\$4,255,138</b>	<b>\$4,982,088</b>	<b>\$4,747,069</b>	<b>\$6,296,927</b>	<b>\$6,626,967</b>	<b>\$3,832,262</b>

**Annual Percentage Distribution**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	1.3	11.2	2.4	1.4	1.9	4.0	7.4	3.6	4.3	7.2
Civic Center	4.9	4.6	8.4	3.6	17.4	7.6	7.2	4.3	8.4	10.4
Financial	27.0	21.0	28.9	19.5	28.9	27.6	24.8	25.5	17.6	18.4
Mission	3.3	4.1	3.7	3.1	1.9	3.5	4.2	5.7	5.0	7.0
North Beach	3.6	3.0	1.8	1.7	0.8	1.4	1.6	2.3	1.0	1.4
North Central	12.2	8.8	8.5	5.5	8.9	5.9	4.4	6.7	3.9	7.2
Northwest	6.6	4.7	4.0	2.7	2.3	2.2	2.8	2.1	3.1	4.6
South of Market	20.3	16.2	24.0	44.2	26.2	33.4	35.5	29.7	37.4	23.6
Southwest	17.0	22.4	15.5	9.3	8.3	9.6	9.6	17.7	13.3	16.7
Van Ness	3.6	4.0	2.6	8.8	3.6	4.7	2.5	2.2	5.9	3.3
Unclassified	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	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**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	500.2	-68.4	-23.7	111.3	142.1	77.2	-35.0	24.1	-2.2
Civic Center	-33.0	165.0	-44.7	668.0	-48.9	-9.5	-20.3	103.9	-28.2
Financial	-44.7	100.6	-12.9	134.7	12.0	-14.4	36.7	-27.4	-39.5
Mission	-10.7	32.6	7.3	-4.4	122.8	11.8	81.2	-7.3	-19.3
North Beach	-40.3	-12.3	18.2	-27.3	116.8	4.5	96.9	-55.9	-14.0
North Central	-48.7	41.1	-16.3	155.9	-21.6	-28.8	99.5	-38.7	6.5
Northwest	-49.1	24.3	-12.7	32.1	11.7	23.5	-0.2	53.1	-13.1
South of Market	-43.4	116.0	137.9	-6.0	49.3	1.4	11.0	32.3	-63.5
Southwest	-6.2	0.8	-22.6	41.2	36.4	-4.8	143.7	-21.0	-27.3
Van Ness	-21.8	-4.2	332.9	-35.8	54.2	-49.2	18.4	177.5	-67.9
Unclassified	-91.3	236.6	124.8	-89.6	1,423.8	-80.1	1,320.1	263.2	-59.7
<b>TOTAL</b>	<b>-28.8</b>	<b>45.5</b>	<b>29.0</b>	<b>58.9</b>	<b>17.1</b>	<b>-4.7</b>	<b>32.6</b>	<b>5.2</b>	<b>-42.2</b>

1. Starting in 2010, there are a large number of permits for which locational information is not available.

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, 2008–2017**

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.B) divided by the total permits (Table 6.2.1.A).

**Average Construction Costs (Inflation-Adjusted 2017 \$ 000s)**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	\$42.1	\$288.7	\$88.4	\$64.4	\$122.9	\$285.5	\$514.2	\$266.1	\$375.0	\$317.5
Civic Center	\$109.4	\$87.7	\$245.9	\$123.7	\$935.3	\$357.1	\$296.5	\$238.1	\$475.1	\$368.7
Financial	\$160.6	\$111.4	\$231.0	\$174.8	\$356.6	\$374.9	\$323.7	\$381.6	\$287.1	\$188.0
Mission	\$33.1	\$32.7	\$40.8	\$45.5	\$42.1	\$85.3	\$88.3	\$153.6	\$143.1	\$111.7
North Beach	\$87.6	\$61.0	\$58.7	\$61.7	\$46.2	\$77.3	\$85.0	\$151.5	\$69.9	\$64.4
North Central	\$69.5	\$39.0	\$59.2	\$50.6	\$117.2	\$84.8	\$57.3	\$105.5	\$64.8	\$64.5
Northwest	\$53.4	\$35.5	\$44.0	\$37.8	\$49.5	\$51.0	\$56.2	\$52.3	\$82.3	\$65.5
South of Market	\$180.1	\$111.3	\$252.9	\$555.8	\$448.9	\$570.7	\$551.5	\$619.8	\$851.6	\$323.8
Southwest	\$39.4	\$42.2	\$42.7	\$33.9	\$46.0	\$57.4	\$53.6	\$121.4	\$101.3	\$69.7
Van Ness	\$61.6	\$57.9	\$51.4	\$213.8	\$121.3	\$168.0	\$77.6	\$91.5	\$268.6	\$77.5
Unclassified	\$16.9	\$0.6	\$2.4	\$4.6	\$0.4	\$5.4	\$0.8	\$132.8	\$781.1	\$300.3
Citywide Average	\$77.4	\$63.5	\$94.1	\$118.5	\$175.1	\$184.5	\$168.5	\$211.2	\$230.5	\$129.8

**Percentage Change**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	585.8	-69.4	-27.1	90.9	132.3	80.1	-48.3	40.9	-15.3
Civic Center	-19.8	180.3	-49.7	656.4	-61.8	-17.0	-19.7	99.5	-22.4
Financial	-30.7	107.4	-24.3	104.1	5.1	-13.6	17.9	-24.8	-34.5
Mission	-1.1	24.7	11.6	-7.4	102.5	3.5	73.9	-6.8	-22.0
North Beach	-30.4	-3.7	5.1	-25.2	67.4	10.0	78.3	-53.9	-7.9
North Central	-43.9	51.6	-14.5	131.7	-27.7	-32.3	84.0	-38.6	-0.4
Northwest	-33.5	23.9	-14.2	31.0	3.0	10.3	-7.0	57.5	-20.4
South of Market	-38.2	127.3	119.8	-19.2	27.1	-3.4	12.4	37.4	-62.0
Southwest	7.1	1.2	-20.7	35.9	24.7	-6.7	126.7	-16.6	-31.2
Van Ness	-6.1	-11.2	315.7	-43.3	38.5	-53.8	17.8	193.6	-71.1
Unclassified	-96.6	322.1	88.2	-90.6	1,142.6	-85.8	17,275.7	488.1	-61.6
Citywide Average	-17.9	48.0	26.0	47.8	5.4	-8.7	25.4	9.1	-43.7

Sources: San Francisco Planning Department; Department of Building Inspection

**Table 6.2.2.A**  
**BUILDING PERMITS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2008–2017**

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

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	16	15	9	3	13	20	18	78	26	17
Civic Center	4	3	9	3	6	11	3	6	9	6
Financial	3	1	3	4	10	9	7	7	10	3
Mission	8	4	4	4	8	15	29	21	20	14
North Beach	1	0	0	1	1	2	1	5	8	1
North Central	14	2	11	7	17	15	12	25	12	9
Northwest	7	3	7	3	5	10	14	5	7	6
South of Market	20	9	8	19	21	34	45	33	33	24
Southwest	55	39	62	19	77	53	81	129	47	42
Van Ness	2	4	3	3	6	2	6	2	11	3
Unclassified	2	1	23	27	34	30	44	0	15	2
<b>TOTAL</b>	<b>132</b>	<b>81</b>	<b>139</b>	<b>93</b>	<b>198</b>	<b>201</b>	<b>260</b>	<b>311</b>	<b>198</b>	<b>127</b>

#### Annual Percentage Distribution

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	12.1	18.5	6.5	3.2	6.6	10.0	6.9	25.1	13.1	13.4
Civic Center	3.0	3.7	6.5	3.2	3.0	5.5	1.2	1.9	4.5	4.7
Financial	2.3	1.2	2.2	4.3	5.1	4.5	2.7	2.3	5.1	2.4
Mission	6.1	4.9	2.9	4.3	4.0	7.5	11.2	6.8	10.1	11.0
North Beach	0.8	0.0	0.0	1.1	0.5	1.0	0.4	1.6	4.0	0.8
North Central	10.6	2.5	7.9	7.5	8.6	7.5	4.6	8.0	6.1	7.1
Northwest	5.3	3.7	5.0	3.2	2.5	5.0	5.4	1.6	3.5	4.7
South of Market	15.2	11.1	5.8	20.4	10.6	16.9	17.3	10.6	16.7	18.9
Southwest	41.7	48.1	44.6	20.4	38.9	26.4	31.2	41.5	23.7	33.1
Van Ness	1.5	4.9	2.2	3.2	3.0	1.0	2.3	0.6	5.6	2.4
Unclassified	1.5	1.2	16.5	29.0	17.2	14.9	16.9	0.0	7.6	1.6
<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

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	-6.3	-40.0	-66.7	333.3	53.8	-10.0	333.3	-66.7	-34.6
Civic Center	-25.0	200.0	-66.7	100.0	83.3	-72.7	100.0	50.0	-33.3
Financial	-66.7	200.0	33.3	150.0	-10.0	-22.2	0.0	42.9	-70.0
Mission	-50.0	0.0	0.0	100.0	87.5	93.3	-27.6	-4.8	-30.0
North Beach	-100.0	--	--	0.0	100.0	-50.0	400.0	60.0	-87.5
North Central	-85.7	450.0	-36.4	142.9	-11.8	-20.0	108.3	-52.0	-25.0
Northwest	-57.1	133.3	-57.1	66.7	100.0	40.0	-64.3	40.0	-14.3
South of Market	-55.0	-11.1	137.5	10.5	61.9	32.4	-26.7	0.0	-27.3
Southwest	-29.1	59.0	-69.4	305.3	-31.2	52.8	59.3	-63.6	-10.6
Van Ness	100.0	-25.0	0.0	100.0	-66.7	200.0	-66.7	450.0	-72.7
Unclassified	-50.0	2,200.0	17.4	25.9	-11.8	46.7	-100.0	--	--
<b>TOTAL</b>	<b>-38.6</b>	<b>71.6</b>	<b>-33.1</b>	<b>112.9</b>	<b>1.5</b>	<b>29.4</b>	<b>19.6</b>	<b>-36.3</b>	<b>-35.9</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, 2008–2017**

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 2017 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 2017 \$ 000s)**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	\$6,096	\$123,041	\$26,042	\$890	\$56,485	\$160,728	\$255,069	\$86,308	\$213,401	\$247,662
Civic Center	\$13,413	\$13,171	\$105,996	\$29,670	\$329,342	\$18,136	\$220,269	\$101,739	\$455,839	\$249,000
Financial	\$29,092	\$21,468	\$219,625	\$171,947	\$767,564	\$746,857	\$689,198	\$756,299	\$565,113	\$53,913
Mission	\$4,696	\$4,121	\$7,122	\$5,333	\$6,572	\$60,795	\$84,114	\$222,582	\$174,684	\$126,084
North Beach	\$30,992	\$0	\$0	\$8,256	\$425	\$11,163	\$709	\$15,167	\$13,135	\$100
North Central	\$93,268	\$2,503	\$47,303	\$24,883	\$196,669	\$23,212	\$27,127	\$75,265	\$28,809	\$25,779
Northwest	\$31,743	\$2,805	\$5,045	\$3,826	\$4,971	\$9,550	\$17,476	\$5,003	\$84,821	\$39,951
South of Market	\$215,451	\$9,888	\$276,095	\$821,578	\$625,473	\$923,952	\$924,461	\$1,277,005	\$2,036,552	\$378,020
Southwest	\$82,091	\$112,761	\$105,047	\$15,440	\$91,343	\$112,801	\$94,883	\$685,234	\$413,376	\$243,994
Van Ness	\$6,785	\$17,220	\$6,212	\$182,978	\$61,197	\$44,588	\$23,904	\$16,612	\$298,544	\$23,500
Unclassified	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$15,918	\$5,000
<b>TOTAL</b>	<b>\$513,627</b>	<b>\$306,978</b>	<b>\$798,487</b>	<b>\$1,264,801</b>	<b>\$2,140,041</b>	<b>\$2,111,782</b>	<b>\$2,337,210</b>	<b>\$3,241,214</b>	<b>\$4,300,192</b>	<b>\$1,393,003</b>

**Annual Percentage Distribution**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	1.2	40.1	3.3	0.1	2.6	7.6	10.9	2.7	5.0	17.8
Civic Center	2.6	4.3	13.3	2.3	15.4	0.9	9.4	3.1	10.6	17.9
Financial	5.7	7.0	27.5	13.6	35.9	35.4	29.5	23.3	13.1	3.9
Mission	0.9	1.3	0.9	0.4	0.3	2.9	3.6	6.9	4.1	9.1
North Beach	6.0	0.0	0.0	0.7	0.0	0.5	0.0	0.5	0.3	0.0
North Central	18.2	0.8	5.9	2.0	9.2	1.1	1.2	2.3	0.7	1.9
Northwest	6.2	0.9	0.6	0.3	0.2	0.5	0.7	0.2	2.0	2.9
South of Market	41.9	3.2	34.6	65.0	29.2	43.8	39.6	39.4	47.4	27.1
Southwest	16.0	36.7	13.2	1.2	4.3	5.3	4.1	21.1	9.6	17.5
Van Ness	1.3	5.6	0.8	14.5	2.9	2.1	1.0	0.5	6.9	1.7
Unclassified	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	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**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	
Bayview	1,918.4	-78.8	-96.6	6,246.6	184.5	58.7	-66.2	147.3	16.1	
Civic Center	-1.8	704.8	-72.0	1,010.0	-94.5	1,114.5	-53.8	348.0	-45.4	
Financial	-26.2	923.0	-21.7	346.4	-2.7	-7.7	9.7	-25.3	-90.5	
Mission	-12.2	72.8	-25.1	23.2	825.1	38.4	164.6	-21.5	-27.8	
North Beach	--	--	--	-94.9	2,526.6	-93.6	2,039.2	-13.4	-99.2	
North Central	-97.3	1,789.9	-47.4	690.4	-88.2	16.9	177.5	-61.7	-10.5	
Northwest	-91.2	79.9	-24.2	29.9	92.1	83.0	-71.4	1,595.4	-52.9	
South of Market	-95.4	2,692.2	197.6	-23.9	47.7	0.1	38.1	59.5	-81.4	
Southwest	37.4	-6.8	-85.3	491.6	23.5	-15.9	622.2	-39.7	-41.0	
Van Ness	153.8	-63.9	2,845.6	-66.6	-27.1	-46.4	-30.5	1,697.2	-92.1	
Unclassified	--	--	--	--	--	--	--	--	-68.6	
<b>TOTAL</b>		<b>-40.2</b>	<b>160.1</b>	<b>58.4</b>	<b>69.2</b>	<b>-1.3</b>	<b>10.7</b>	<b>38.7</b>	<b>32.7</b>	<b>-67.6</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, 2008–2017**

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.B) divided by the total permits (Table 6.2.2.A).

**Average Construction Costs (Inflation-Adjusted 2017 \$ 000s)**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	\$381	\$8,203	\$2,894	\$297	\$4,345	\$8,036	\$14,171	\$1,107	\$8,208	\$14,568
Civic Center	\$3,353	\$4,390	\$11,777	\$9,890	\$54,890	\$1,649	\$73,423	\$16,957	\$50,649	\$41,500
Financial	\$9,697	\$21,468	\$73,208	\$42,987	\$76,756	\$82,984	\$98,457	\$108,043	\$56,511	\$17,971
Mission	\$587	\$1,030	\$1,781	\$1,333	\$822	\$4,053	\$2,900	\$10,599	\$8,734	\$9,006
North Beach	\$30,992	--	--	\$8,256	\$425	\$5,582	\$709	\$3,033	\$1,642	\$100
North Central	\$6,662	\$1,252	\$4,300	\$3,555	\$11,569	\$1,547	\$2,261	\$3,011	\$2,401	\$2,864
Northwest	\$4,535	\$935	\$721	\$1,275	\$994	\$955	\$1,248	\$1,001	\$12,117	\$6,659
South of Market	\$10,773	\$1,099	\$34,512	\$43,241	\$29,784	\$27,175	\$20,544	\$38,697	\$61,714	\$15,751
Southwest	\$1,493	\$2,891	\$1,694	\$813	\$1,186	\$2,128	\$1,171	\$5,312	\$8,795	\$5,809
Van Ness	\$3,393	\$4,305	\$2,071	\$60,993	\$10,200	\$22,294	\$3,984	\$8,306	\$27,140	\$7,833
Unclassified	\$0	\$0	\$0	\$0	\$0	\$0	\$0	--	\$1,061	\$2,500
Citywide Average	\$3,891	\$3,790	\$5,745	\$13,600	\$10,808	\$10,506	\$8,989	\$10,422	\$21,718	\$10,969

**Percentage Change**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	2,052.9	-64.7	-89.7	1,364.6	85.0	76.3	-92.2	641.8	77.5
Civic Center	30.9	168.3	-16.0	455.0	-97.0	4,353.3	-76.9	198.7	-18.1
Financial	121.4	241.0	-41.3	78.6	8.1	18.6	9.7	-47.7	-68.2
Mission	75.5	72.8	-25.1	-38.4	393.4	-28.4	265.4	-17.6	3.1
North Beach	--	--	--	-94.9	1,213.3	-87.3	327.8	-45.9	-93.9
North Central	-81.2	243.6	-17.3	225.4	-86.6	46.1	33.2	-20.3	19.3
Northwest	-79.4	-22.9	77.0	-22.0	-3.9	30.7	-19.8	1,111.0	-45.0
South of Market	-89.8	3,041.3	25.3	-31.1	-8.8	-24.4	88.4	59.5	-74.5
Southwest	93.7	-41.4	-52.0	46.0	79.4	-45.0	353.5	65.6	-33.9
Van Ness	26.9	-51.9	2,845.6	-83.3	118.6	-82.1	108.5	226.8	-71.1
Unclassified	--	--	--	--	--	--	--	--	--
Citywide Average	-2.6	51.6	136.7	-20.5	-2.8	-14.4	15.9	108.4	-49.5

Sources: San Francisco Planning Department; Department of Building Inspection



**Table 6.2.3.A****BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2008–2017**

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**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	601	524	544	572	635	646	647	762	701	826
Civic Center	843	723	674	734	736	1,003	1,100	1,072	1,086	1,023
Financial	3,238	2,608	2,508	2,882	3,213	3,548	3,481	4,068	3,909	3,642
Mission	1,939	1,753	1,864	1,785	1,839	2,019	2,178	2,279	2,257	2,337
North Beach	805	689	626	705	673	836	822	936	867	835
North Central	3,433	3,165	2,943	2,870	3,116	3,401	3,614	3,917	3,898	4,179
Northwest	2,440	1,874	1,877	1,916	1,904	2,045	2,326	2,508	2,449	2,655
South of Market	2,152	2,004	1,841	2,019	2,298	2,722	2,859	2,850	2,725	2,628
Southwest	8,519	7,476	7,431	7,282	7,435	8,216	8,335	8,944	8,569	9,051
Van Ness	1,148	956	1,048	1,085	1,208	1,356	1,495	1,497	1,429	1,574
Unclassified	88	227	156	187	191	253	335	33	19	17
<b>TOTAL</b>	<b>25,206</b>	<b>21,999</b>	<b>21,512</b>	<b>22,037</b>	<b>23,248</b>	<b>26,045</b>	<b>27,192</b>	<b>28,866</b>	<b>27,909</b>	<b>28,767</b>

**Annual Percentage Distribution**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	2.4	2.4	2.5	2.6	2.7	2.5	2.4	2.6	2.5	2.9
Civic Center	3.3	3.3	3.1	3.3	3.2	3.9	4.0	3.7	3.9	3.6
Financial	12.8	11.9	11.7	13.1	13.8	13.6	12.8	14.1	14.0	12.7
Mission	7.7	8.0	8.7	8.1	7.9	7.8	8.0	7.9	8.1	8.1
North Beach	3.2	3.1	2.9	3.2	2.9	3.2	3.0	3.2	3.1	2.9
North Central	13.6	14.4	13.7	13.0	13.4	13.1	13.3	13.6	14.0	14.5
Northwest	9.7	8.5	8.7	8.7	8.2	7.9	8.6	8.7	8.8	9.2
South of Market	8.5	9.1	8.6	9.2	9.9	10.5	10.5	9.9	9.8	9.1
Southwest	33.8	34.0	34.5	33.0	32.0	31.5	30.7	31.0	30.7	31.5
Van Ness	4.6	4.3	4.9	4.9	5.2	5.2	5.5	5.2	5.1	5.5
Unclassified	0.3	1.0	0.7	0.8	0.8	1.0	1.2	0.1	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**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	-12.8	3.8	5.1	11.0	1.7	0.2	17.8	-8.0	17.8
Civic Center	-14.2	-6.8	8.9	0.3	36.3	9.7	-2.5	1.3	-5.8
Financial	-19.5	-3.8	14.9	11.5	10.4	-1.9	16.9	-3.9	-6.8
Mission	-9.6	6.3	-4.2	3.0	9.8	7.9	4.6	-1.0	3.5
North Beach	-14.4	-9.1	12.6	-4.5	24.2	-1.7	13.9	-7.4	-3.7
North Central	-7.8	-7.0	-2.5	8.6	9.1	6.3	8.4	-0.5	7.2
Northwest	-23.2	0.2	2.1	-0.6	7.4	13.7	7.8	-2.4	8.4
South of Market	-6.9	-8.1	9.7	13.8	18.5	5.0	-0.3	-4.4	-3.6
Southwest	-12.2	-0.6	-2.0	2.1	10.5	1.4	7.3	-4.2	5.6
Van Ness	-16.7	9.6	3.5	11.3	12.3	10.3	0.1	-4.5	10.1
Unclassified	158.0	-31.3	19.9	2.1	32.5	32.4	-90.1	-42.4	-10.5
<b>TOTAL</b>	<b>-12.7</b>	<b>-2.2</b>	<b>2.4</b>	<b>5.5</b>	<b>12.0</b>	<b>4.4</b>	<b>6.2</b>	<b>-3.3</b>	<b>3.1</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, 2008–2017**

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by Commerce & Industry District. For ease of comprehension, costs are adjusted for inflation, with 2016 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 2017\$ 000s)**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	\$20,350	\$36,335	\$21,322	\$37,498	\$23,589	\$34,785	\$93,780	\$137,355	\$68,074	\$28,149
Civic Center	\$84,608	\$52,560	\$68,418	\$66,563	\$411,978	\$140,936	\$122,553	\$171,393	\$100,782	\$149,784
Financial	\$509,754	\$277,002	\$380,357	\$350,779	\$458,616	\$618,907	\$486,901	\$835,940	\$593,950	\$651,073
Mission	\$60,440	\$53,954	\$70,012	\$77,349	\$72,296	\$114,572	\$113,009	\$134,524	\$156,234	\$138,879
North Beach	\$41,657	\$43,376	\$37,978	\$36,579	\$32,184	\$57,344	\$73,162	\$130,617	\$51,000	\$55,092
North Central	\$149,151	\$122,183	\$128,915	\$122,502	\$179,618	\$272,001	\$183,352	\$344,784	\$228,519	\$247,705
Northwest	\$100,474	\$64,484	\$78,625	\$69,225	\$91,516	\$97,830	\$115,707	\$127,829	\$118,692	\$136,735
South of Market	\$189,988	\$220,287	\$220,418	\$358,152	\$485,310	\$723,480	\$760,220	\$592,922	\$438,486	\$512,115
Southwest	\$258,315	\$205,011	\$216,821	\$233,834	\$241,618	\$365,103	\$346,020	\$428,435	\$464,056	\$394,944
Van Ness	\$66,101	\$39,764	\$48,486	\$53,858	\$90,122	\$188,932	\$93,219	\$124,153	\$92,740	\$102,029
Unclassified	\$1,542	\$134	\$451	\$1,013	\$105	\$1,600	\$318	\$4,511	\$486	\$1,202
<b>TOTAL</b>	<b>\$1,482,380</b>	<b>\$1,115,090</b>	<b>\$1,271,803</b>	<b>\$1,407,352</b>	<b>\$2,086,952</b>	<b>\$2,615,490</b>	<b>\$2,388,241</b>	<b>\$3,032,463</b>	<b>\$2,313,019</b>	<b>\$2,417,707</b>

**Annual Percentage Distribution**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2016
Bayview	1.4	3.3	1.7	2.7	1.1	1.3	3.9	4.5	2.9	1.2
Civic Center	5.7	4.7	5.4	4.7	19.7	5.4	5.1	5.7	4.4	6.2
Financial	34.4	24.8	29.9	24.9	22.0	23.7	20.4	27.6	25.7	26.9
Mission	4.1	4.8	5.5	5.5	3.5	4.4	4.7	4.4	6.8	5.7
North Beach	2.8	3.9	3.0	2.6	1.5	2.2	3.1	4.3	2.2	2.3
North Central	10.1	11.0	10.1	8.7	8.6	10.4	7.7	11.4	9.9	10.2
Northwest	6.8	5.8	6.2	4.9	4.4	3.7	4.8	4.2	5.1	5.7
South of Market	12.8	19.8	17.3	25.4	23.3	27.7	31.8	19.6	19.0	21.2
Southwest	17.4	18.4	17.0	16.6	11.6	14.0	14.5	14.1	20.1	16.3
Van Ness	4.5	3.6	3.8	3.8	4.3	7.2	3.9	4.1	4.0	4.2
Unclassified	0.1	0.0	0.0	0.1	0.0	0.1	0.0	0.1	0.0	0.0
<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**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	78.6	-41.3	75.9	-37.1	47.5	169.6	46.5	-50.4	-58.6
Civic Center	-37.9	30.2	-2.7	518.9	-65.8	-13.0	39.9	-41.2	48.6
Financial	-45.7	37.3	-7.8	30.7	35.0	-21.3	71.7	-28.9	9.6
Mission	-10.7	29.8	10.5	-6.5	58.5	-1.4	19.0	16.1	-11.1
North Beach	4.1	-12.4	-3.7	-12.0	78.2	27.6	78.5	-61.0	8.0
North Central	-18.1	5.5	-5.0	46.6	51.4	-32.6	88.0	-33.7	8.4
Northwest	-35.8	21.9	-12.0	32.2	6.9	18.3	10.5	-7.1	15.2
South of Market	15.9	0.1	62.5	35.5	49.1	5.1	-22.0	-26.0	16.8
Southwest	-20.6	5.8	7.8	3.3	51.1	-5.2	23.8	8.3	-14.9
Van Ness	-39.8	21.9	11.1	67.3	109.6	-50.7	33.2	-25.3	10.0
Unclassified	-91.3	236.6	124.6	-89.6	1423.8	-80.1	1318.6	-89.2	147.3
<b>TOTAL</b>	<b>-24.8</b>	<b>14.1</b>	<b>10.7</b>	<b>48.3</b>	<b>25.3</b>	<b>-8.7</b>	<b>27.0</b>	<b>-23.7</b>	<b>4.5</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, 2008–2017**

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.B) divided by the total permits (Table 6.2.3.A).

**Average Construction Costs (Inflation-Adjusted 2017 \$ 000s)**

<i>C&amp;I District</i>	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bayview	\$33.9	\$69.3	\$39.2	\$65.6	\$37.1	\$53.8	\$144.9	\$180.3	\$97.1	\$34.1
Civic Center	\$100.4	\$72.7	\$101.5	\$90.7	\$559.8	\$140.5	\$111.4	\$159.9	\$92.8	\$146.4
Financial	\$157.4	\$106.2	\$151.7	\$121.7	\$142.7	\$174.4	\$139.9	\$205.5	\$151.9	\$178.8
Mission	\$31.2	\$30.8	\$37.6	\$43.3	\$39.3	\$56.7	\$51.9	\$59.0	\$69.2	\$59.4
North Beach	\$51.7	\$63.0	\$60.7	\$51.9	\$47.8	\$68.6	\$89.0	\$139.5	\$58.8	\$66.0
North Central	\$43.4	\$38.6	\$43.8	\$42.7	\$57.6	\$80.0	\$50.7	\$88.0	\$58.6	\$59.3
Northwest	\$41.2	\$34.4	\$41.9	\$36.1	\$48.1	\$47.8	\$49.7	\$51.0	\$48.5	\$51.5
South of Market	\$88.3	\$109.9	\$119.7	\$177.4	\$211.2	\$265.8	\$265.9	\$208.0	\$160.9	\$194.9
Southwest	\$30.3	\$27.4	\$29.2	\$32.1	\$32.5	\$44.4	\$41.5	\$47.9	\$54.2	\$43.6
Van Ness	\$57.6	\$41.6	\$46.3	\$49.6	\$74.6	\$139.3	\$62.4	\$82.9	\$64.9	\$64.8
Unclassified	\$17.5	\$0.6	\$2.9	\$5.4	\$0.5	\$6.3	\$0.9	\$136.7	\$25.6	\$70.7
Citywide Average	\$58.8	\$50.7	\$59.1	\$63.9	\$89.8	\$100.4	\$87.8	\$105.1	\$82.9	\$84.0

**Percentage Change**

<i>C&amp;I District</i>	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Bayview	104.8	-43.5	67.3	-43.3	45.0	169.2	24.4	-46.1	-64.9
Civic Center	-27.6	39.6	-10.7	517.2	-74.9	-20.7	43.5	-42.0	57.8
Financial	-32.5	42.8	-19.7	17.3	22.2	-19.8	46.9	-26.1	17.7
Mission	-1.3	22.0	15.4	-9.3	44.3	-8.6	13.8	17.3	-14.2
North Beach	21.7	-3.6	-14.5	-7.8	43.4	29.8	56.8	-57.8	12.2
North Central	-11.1	13.5	-2.6	35.0	38.7	-36.6	73.5	-33.4	1.1
Northwest	-16.4	21.7	-13.7	33.0	-0.5	4.0	2.5	-4.9	6.3
South of Market	24.5	8.9	48.2	19.1	25.9	0.0	-21.8	-22.7	21.1
Southwest	-9.6	6.4	10.1	1.2	36.7	-6.6	15.4	13.1	-19.4
Van Ness	-27.8	11.2	7.3	50.3	86.8	-55.2	33.0	-21.7	-0.1
Unclassified	-96.6	389.7	87.4	-89.9	1050.4	-85.0	14300.5	-81.3	176.4
Citywide Average	-13.8	16.6	8.0	40.6	11.9	-12.5	19.6	-21.1	1.4

Sources: San Francisco Planning Department; Department of Building Inspection

**Table 6.3.A**  
**PERMIT APPLICATIONS**  
**BY COMMERCE &**  
**INDUSTRY DISTRICT AND**  
**LAND USE CATEGORY,**  
**2017**

This table presents the permit applications 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

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	48	66	108	0	24	563	60	869
Civic Center	259	194	1	112	44	411	64	1,085
Financial	2,735	325	18	64	65	405	145	3,757
Mission	102	195	42	25	63	1,885	80	2,392
North Beach	38	108	4	31	23	625	30	859
North Central	67	224	3	36	110	3,708	101	4,249
Northwest	25	98	8	1	47	2,461	58	2,698
South of Market	783	403	172	44	107	1,098	185	2,792
Southwest	122	298	30	1	151	8,385	203	9,190
Van Ness	95	96	9	13	50	1,304	54	1,621
Unclassified	1	8	1	0	1	5	6	22
<b>TOTAL</b>	<b>4,275</b>	<b>2,015</b>	<b>396</b>	<b>327</b>	<b>685</b>	<b>20,850</b>	<b>986</b>	<b>29,534</b>

#### Percentage Distribution by C&I District

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	1.1	3.3	27.3	0.0	3.5	2.7	6.1	2.9
Civic Center	6.1	9.6	0.3	34.3	6.4	2.0	6.5	3.7
Financial	64.0	16.1	4.5	19.6	9.5	1.9	14.7	12.7
Mission	2.4	9.7	10.6	7.6	9.2	9.0	8.1	8.1
North Beach	0.9	5.4	1.0	9.5	3.4	3.0	3.0	2.9
North Central	1.6	11.1	0.8	11.0	16.1	17.8	10.2	14.4
Northwest	0.6	4.9	2.0	0.3	6.9	11.8	5.9	9.1
South of Market	18.3	20.0	43.4	13.5	15.6	5.3	18.8	9.5
Southwest	2.9	14.8	7.6	0.3	22.0	40.2	20.6	31.1
Van Ness	2.2	4.8	2.3	4.0	7.3	6.3	5.5	5.5
Unclassified	0.0	0.4	0.3	0.0	0.1	0.0	0.6	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>

#### Percentage Distribution by Land Use Category

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	5.5	7.6	12.4	0.0	2.8	64.8	6.9	100.0
Civic Center	23.9	17.9	0.1	10.3	4.1	37.9	5.9	100.0
Financial	72.8	8.7	0.5	1.7	1.7	10.8	3.9	100.0
Mission	4.3	8.2	1.8	1.0	2.6	78.8	3.3	100.0
North Beach	4.4	12.6	0.5	3.6	2.7	72.8	3.5	100.0
North Central	1.6	5.3	0.1	0.8	2.6	87.3	2.4	100.0
Northwest	0.9	3.6	0.3	0.0	1.7	91.2	2.1	100.0
South of Market	28.0	14.4	6.2	1.6	3.8	39.3	6.6	100.0
Southwest	1.3	3.2	0.3	0.0	1.6	91.2	2.2	100.0
Van Ness	5.9	5.9	0.6	0.8	3.1	80.4	3.3	100.0
Unclassified	4.5	36.4	4.5	0.0	4.5	22.7	27.3	100.0
<b>TOTAL</b>	<b>14.5</b>	<b>6.8</b>	<b>1.3</b>	<b>1.1</b>	<b>2.3</b>	<b>70.6</b>	<b>3.3</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, 2017**

This table presents the total construction cost for all permit applications 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 (2017 \$ 000s)**

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	\$62,541	\$4,586	\$6,438	\$0	\$2,683	\$198,016	\$1,673	\$275,938
Civic Center	\$47,548	\$40,304	\$14	\$12,990	\$11,839	\$285,831	\$1,516	\$400,042
Financial	\$538,789	\$38,026	\$2,011	\$9,388	\$13,690	\$81,903	\$22,686	\$706,493
Mission	\$70,275	\$11,030	\$4,927	\$1,605	\$18,888	\$157,741	\$2,618	\$267,085
North Beach	\$2,500	\$10,086	\$3,066	\$8,526	\$2,438	\$28,115	\$558	\$55,290
North Central	\$2,869	\$9,084	\$90	\$2,205	\$30,056	\$225,573	\$4,335	\$274,212
Northwest	\$1,547	\$16,244	\$106	\$20	\$19,829	\$138,679	\$405	\$176,830
South of Market	\$327,244	\$35,622	\$37,926	\$17,096	\$30,185	\$408,131	\$47,737	\$903,940
Southwest	\$15,267	\$34,280	\$1,173	\$4	\$21,349	\$563,970	\$4,077	\$640,120
Van Ness	\$17,641	\$7,731	\$1,218	\$1,345	\$16,905	\$80,407	\$459	\$125,706
Unclassified	\$35	\$63	\$3,000	\$0	\$139	\$2,050	\$1,319	\$6,606
<b>TOTAL</b>	<b>\$1,086,257</b>	<b>\$207,056</b>	<b>\$59,969</b>	<b>\$53,179</b>	<b>\$168,001</b>	<b>\$2,170,417</b>	<b>\$87,382</b>	<b>\$3,832,262</b>

**Annual Percentage Distribution by C&I District**

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	5.8	2.2	10.7	0.0	1.6	9.1	1.9	7.2
Civic Center	4.4	19.5	0.0	24.4	7.0	13.2	1.7	10.4
Financial	49.6	18.4	3.4	17.7	8.1	3.8	26.0	18.4
Mission	6.5	5.3	8.2	3.0	11.2	7.3	3.0	7.0
North Beach	0.2	4.9	5.1	16.0	1.5	1.3	0.6	1.4
North Central	0.3	4.4	0.2	4.1	17.9	10.4	5.0	7.2
Northwest	0.1	7.8	0.2	0.0	11.8	6.4	0.5	4.6
South of Market	30.1	17.2	63.2	32.1	18.0	18.8	54.6	23.6
Southwest	1.4	16.6	2.0	0.0	12.7	26.0	4.7	16.7
Van Ness	1.6	3.7	2.0	2.5	10.1	3.7	0.5	3.3
Unclassified	0.0	0.0	5.0	0.0	0.1	0.1	1.5	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**

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	22.7	1.7	2.3	0.0	1.0	71.8	0.6	100.0
Civic Center	11.9	10.1	0.0	3.2	3.0	71.5	0.4	100.0
Financial	76.3	5.4	0.3	1.3	1.9	11.6	3.2	100.0
Mission	26.3	4.1	1.8	0.6	7.1	59.1	1.0	100.0
North Beach	4.5	18.2	5.5	15.4	4.4	50.9	1.0	100.0
North Central	1.0	3.3	0.0	0.8	11.0	82.3	1.6	100.0
Northwest	0.9	9.2	0.1	0.0	11.2	78.4	0.2	100.0
South of Market	36.2	3.9	4.2	1.9	3.3	45.2	5.3	100.0
Southwest	2.4	5.4	0.2	0.0	3.3	88.1	0.6	100.0
Van Ness	14.0	6.2	1.0	1.1	13.4	64.0	0.4	100.0
Unclassified	0.5	0.9	45.4	0.0	2.1	31.0	20.0	100.0
<b>TOTAL</b>	<b>28.3</b>	<b>5.4</b>	<b>1.6</b>	<b>1.4</b>	<b>4.4</b>	<b>56.6</b>	<b>2.3</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, 2017**

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

#### Average Construction Costs (2017 \$ 000s)

<i>C&amp;I District</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>Hotel</i>	<i>CIE</i>	<i>Residential</i>	<i>Other</i>	<i>Average</i>
Bayview	\$1,302.9	\$69.5	\$59.6	--	\$111.8	\$351.7	\$27.9	\$317.5
Civic Center	\$183.6	\$207.8	\$13.9	\$116.0	\$269.1	\$695.5	\$23.7	\$368.7
Financial	\$197.0	\$117.0	\$111.7	\$146.7	\$210.6	\$202.2	\$156.5	\$188.0
Mission	\$689.0	\$56.6	\$117.3	\$64.2	\$299.8	\$83.7	\$32.7	\$111.7
North Beach	\$65.8	\$93.4	\$766.6	\$275.0	\$106.0	\$45.0	\$18.6	\$64.4
North Central	\$42.8	\$40.6	\$30.0	\$61.3	\$273.2	\$60.8	\$42.9	\$64.5
Northwest	\$61.9	\$165.8	\$13.2	\$20.0	\$421.9	\$56.4	\$7.0	\$65.5
South of Market	\$417.9	\$88.4	\$220.5	\$388.5	\$282.1	\$371.7	\$258.0	\$323.8
Southwest	\$125.1	\$115.0	\$39.1	\$4.0	\$141.4	\$67.3	\$20.1	\$69.7
Van Ness	\$185.7	\$80.5	\$135.3	\$103.5	\$338.1	\$61.7	\$8.5	\$77.5
Unclassified	\$35.0	\$7.8	\$3,000.0	--	\$139.0	\$410.0	\$219.8	\$300.3
Citywide Average	\$254.1	\$102.8	\$151.4	\$162.6	\$245.3	\$104.1	\$88.6	\$129.8

**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, 2017**

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

<i>Land Use Category</i>	<i>Approved</i>	<i>Cancelled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Office	9	18	2,812	1,237	199	4,275
Retail	13	19	1,089	624	270	2,015
PDR	0	3	225	132	36	396
Hotel	2	5	161	133	26	327
CIE	3	5	373	228	76	685
Residential	186	197	11,709	6,514	2,244	20,850
Other	11	1	209	457	308	986
<b>TOTAL</b>	<b>224</b>	<b>248</b>	<b>16,578</b>	<b>9,325</b>	<b>3,159</b>	<b>29,534</b>

#### Percentage Distribution by Land Use Category

<i>Land Use Category</i>	<i>Approved</i>	<i>Cancelled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Office	4.0	7.3	17.0	13.3	6.3	14.5
Retail	5.8	7.7	6.6	6.7	8.5	6.8
PDR	0.0	1.2	1.4	1.4	1.1	1.3
Hotel	0.9	2.0	1.0	1.4	0.8	1.1
CIE	1.3	2.0	2.2	2.4	2.4	2.3
Residential	83.0	79.4	70.6	69.9	71.0	70.6
Other	4.9	0.4	1.3	4.9	9.7	3.3
<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>

#### Percentage Distribution by Permit Status

<i>Land Use Category</i>	<i>Approved</i>	<i>Cancelled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Office	0.2	0.4	65.8	28.9	4.7	100.0
Retail	0.6	0.9	54.0	31.0	13.4	100.0
PDR	0.0	0.8	56.8	33.3	9.1	100.0
Hotel	0.6	1.5	49.2	40.7	8.0	100.0
CIE	0.4	0.7	54.5	33.3	11.1	100.0
Residential	0.9	0.9	56.2	31.2	10.8	100.0
Other	1.1	0.1	21.2	46.3	31.2	100.0
<b>TOTAL</b>	<b>0.8</b>	<b>0.8</b>	<b>56.1</b>	<b>31.6</b>	<b>10.7</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, 2017**

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.

**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

**Total Construction Costs (2017 \$ 000s)**

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$939	\$923	\$461,585	\$434,806	\$188,003	\$1,086,257
Retail	\$8,235	\$460	\$68,391	\$93,775	\$36,196	\$207,056
PDR	\$0	\$106	\$29,378	\$23,956	\$6,530	\$59,969
Hotel	\$65	\$62	\$13,242	\$29,685	\$10,126	\$53,179
CIE	\$3,150	\$325	\$35,169	\$65,871	\$63,486	\$168,001
Residential	\$85,692	\$4,478	\$310,821	\$659,869	\$1,109,557	\$2,170,417
Other	\$1,402	\$10	\$6,869	\$63,407	\$15,694	\$87,382
<b>TOTAL</b>	<b>\$99,483</b>	<b>\$6,363</b>	<b>\$925,455</b>	<b>\$1,371,368</b>	<b>\$1,429,593</b>	<b>\$3,832,262</b>

**Percentage Distribution by Land Use Category**

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.9	14.5	49.9	31.7	13.2	28.3
Retail	8.3	7.2	7.4	6.8	2.5	5.4
PDR	0.0	1.7	3.2	1.7	0.5	1.6
Hotel	0.1	1.0	1.4	2.2	0.7	1.4
CIE	3.2	5.1	3.8	4.8	4.4	4.4
Residential	86.1	70.4	33.6	48.1	77.6	56.6
Other	1.4	0.2	0.7	4.6	1.1	2.3
<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>

**Percentage Distribution by Permit Status**

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.1	0.1	42.5	40.0	17.3	100.0
Retail	4.0	0.2	33.0	45.3	17.5	100.0
PDR	0.0	0.2	49.0	39.9	10.9	100.0
Hotel	0.1	0.1	24.9	55.8	19.0	100.0
CIE	1.9	0.2	20.9	39.2	37.8	100.0
Residential	3.9	0.2	14.3	30.4	51.1	100.0
Other	1.6	0.0	7.9	72.6	18.0	100.0
<b>TOTAL</b>	<b>2.6</b>	<b>0.2</b>	<b>24.1</b>	<b>35.8</b>	<b>37.3</b>	<b>100.0</b>

**Table 6.4.1.C**  
**AVERAGE CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2017**

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

**Average Construction Costs (2017 \$ 000s)**

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$104.3	\$51.3	\$164.1	\$351.5	\$944.7	\$254.1
Retail	\$633.4	\$24.2	\$62.8	\$150.3	\$134.1	\$102.8
PDR	--	\$35.3	\$130.6	\$181.5	\$181.4	\$151.4
Hotel	\$32.5	\$12.4	\$82.2	\$223.2	\$389.5	\$162.6
CIE	\$1,050.0	\$65.0	\$94.3	\$288.9	\$835.3	\$245.3
Residential	\$460.7	\$22.7	\$26.5	\$101.3	\$494.5	\$104.1
Other	\$127.5	\$10.0	\$32.9	\$138.7	\$51.0	\$88.6
<b>TOTAL</b>	<b>\$444.1</b>	<b>\$25.7</b>	<b>\$55.8</b>	<b>\$147.1</b>	<b>\$452.5</b>	<b>\$129.8</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, 2017**

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.

**Note:**  
 Other represents those permits still in the pipeline.

**Sources:**  
 San Francisco Planning Department;  
 Department of Building Inspection

### Number of Permits

<i>C&amp;I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	2	3	428	339	97	869
Civic Center	8	12	649	308	108	1,085
Financial	10	27	2,355	1,154	211	3,757
Mission	20	20	1,235	805	312	2,392
North Beach	7	16	481	229	126	859
North Central	48	27	2,291	1,323	560	4,249
Northwest	23	19	1,508	820	328	2,698
South of Market	17	20	1,501	957	297	2,792
Southwest	67	92	5,281	2,866	884	9,190
Van Ness	22	12	840	516	231	1,621
Unclassified	0	0	9	8	5	22
<b>TOTAL</b>	<b>224</b>	<b>248</b>	<b>16,578</b>	<b>9,325</b>	<b>3,159</b>	<b>29,534</b>

### Percentage Distribution by C&I District

<i>C&amp;I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	0.9	1.2	2.6	3.6	3.1	2.9
Civic Center	3.6	4.8	3.9	3.3	3.4	3.7
Financial	4.5	10.9	14.2	12.4	6.7	12.7
Mission	8.9	8.1	7.4	8.6	9.9	8.1
North Beach	3.1	6.5	2.9	2.5	4.0	2.9
North Central	21.4	10.9	13.8	14.2	17.7	14.4
Northwest	10.3	7.7	9.1	8.8	10.4	9.1
South of Market	7.6	8.1	9.1	10.3	9.4	9.5
Southwest	29.9	37.1	31.9	30.7	28.0	31.1
Van Ness	9.8	4.8	5.1	5.5	7.3	5.5
Unclassified	0.0	0.0	0.1	0.1	0.2	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>

### Percentage Distribution by Permit Status

<i>C&amp;I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	0.2	0.3	49.3	39.0	11.2	100.0
Civic Center	0.7	1.1	59.8	28.4	10.0	100.0
Financial	0.3	0.7	62.7	30.7	5.6	100.0
Mission	0.8	0.8	51.6	33.7	13.0	100.0
North Beach	0.8	1.9	56.0	26.7	14.7	100.0
North Central	1.1	0.6	53.9	31.1	13.2	100.0
Northwest	0.9	0.7	55.9	30.4	12.2	100.0
South of Market	0.6	0.7	53.8	34.3	10.6	100.0
Southwest	0.7	1.0	57.5	31.2	9.6	100.0
Van Ness	1.4	0.7	51.8	31.8	14.3	100.0
Unclassified	0.0	0.0	40.9	36.4	22.7	100.0
<b>TOTAL</b>	<b>0.8</b>	<b>0.8</b>	<b>56.1</b>	<b>31.6</b>	<b>10.7</b>	<b>100.0</b>

**Table 6.4.2.B**  
**TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2017**

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.

**Note:**  
 Other represents those permits still in the pipeline.

**Sources:**  
 San Francisco Planning Department; Department of Building Inspection

#### Total Construction Costs (2017 \$ 000s)

<i>C&amp;I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	\$2,225	\$27	\$11,411	\$15,461	\$246,815	\$275,938
Civic Center	\$64,554	\$315	\$50,133	\$70,430	\$214,611	\$400,042
Financial	\$1,090	\$1,797	\$331,111	\$297,485	\$75,010	\$706,493
Mission	\$2,496	\$537	\$40,054	\$40,718	\$183,280	\$267,085
North Beach	\$1,868	\$283	\$25,223	\$16,950	\$10,965	\$55,290
North Central	\$5,270	\$925	\$71,565	\$97,743	\$98,710	\$274,212
Northwest	\$5,127	\$228	\$45,193	\$62,668	\$63,614	\$176,830
South of Market	\$2,560	\$358	\$175,953	\$561,958	\$163,111	\$903,940
Southwest	\$12,308	\$1,443	\$140,526	\$155,305	\$330,538	\$640,120
Van Ness	\$1,985	\$450	\$34,046	\$47,075	\$42,151	\$125,706
Unclassified	\$0	\$0	\$240	\$5,577	\$789	\$6,606
<b>TOTAL</b>	<b>\$99,483</b>	<b>\$6,363</b>	<b>\$925,455</b>	<b>\$1,371,368</b>	<b>\$1,429,593</b>	<b>\$3,832,262</b>

#### Percentage Distribution by C&I District

<i>C&amp;I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	2.2	0.4	1.2	1.1	17.3	7.2
Civic Center	64.9	5.0	5.4	5.1	15.0	10.4
Financial	1.1	28.2	35.8	21.7	5.2	18.4
Mission	2.5	8.4	4.3	3.0	12.8	7.0
North Beach	1.9	4.5	2.7	1.2	0.8	1.4
North Central	5.3	14.5	7.7	7.1	6.9	7.2
Northwest	5.2	3.6	4.9	4.6	4.4	4.6
South of Market	2.6	5.6	19.0	41.0	11.4	23.6
Southwest	12.4	22.7	15.2	11.3	23.1	16.7
Van Ness	2.0	7.1	3.7	3.4	2.9	3.3
Unclassified	0.0	0.0	0.0	0.4	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>

#### Percentage Distribution by Permit Status

<i>C&amp;I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	0.8	0.0	4.1	5.6	89.4	100.0
Civic Center	16.1	0.1	12.5	17.6	53.6	100.0
Financial	0.2	0.3	46.9	42.1	10.6	100.0
Mission	0.9	0.2	15.0	15.2	68.6	100.0
North Beach	3.4	0.5	45.6	30.7	19.8	100.0
North Central	1.9	0.3	26.1	35.6	36.0	100.0
Northwest	2.9	0.1	25.6	35.4	36.0	100.0
South of Market	0.3	0.0	19.5	62.2	18.0	100.0
Southwest	1.9	0.2	22.0	24.3	51.6	100.0
Van Ness	1.6	0.4	27.1	37.4	33.5	100.0
Unclassified	0.0	0.0	3.6	84.4	11.9	100.0
<b>TOTAL</b>	<b>2.6</b>	<b>0.2</b>	<b>24.1</b>	<b>35.8</b>	<b>37.3</b>	<b>100.0</b>

**Table 6.4.2.C**  
**AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2017**

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

**Average Construction Costs (2017 \$ 000s)**

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	\$1,112.5	\$9.0	\$26.7	\$45.6	\$2,544.5	\$317.5
Civic Center	\$8,069.3	\$26.3	\$77.2	\$228.7	\$1,987.1	\$368.7
Financial	\$109.0	\$66.6	\$140.6	\$257.8	\$355.5	\$188.0
Mission	\$124.8	\$26.9	\$32.4	\$50.6	\$587.4	\$111.7
North Beach	\$266.9	\$17.7	\$52.4	\$74.0	\$87.0	\$64.4
North Central	\$109.8	\$34.2	\$31.2	\$73.9	\$176.3	\$64.5
Northwest	\$222.9	\$12.0	\$30.0	\$76.4	\$193.9	\$65.5
South of Market	\$150.6	\$17.9	\$117.2	\$587.2	\$549.2	\$323.8
Southwest	\$183.7	\$15.7	\$26.6	\$54.2	\$373.9	\$69.7
Van Ness	\$90.2	\$37.5	\$40.5	\$91.2	\$182.5	\$77.5
Unclassified	--	--	\$26.7	\$697.1	\$157.8	\$300.3
<b>TOTAL</b>	<b>\$444.1</b>	<b>\$25.7</b>	<b>\$55.8</b>	<b>\$147.1</b>	<b>\$452.5</b>	<b>\$129.8</b>

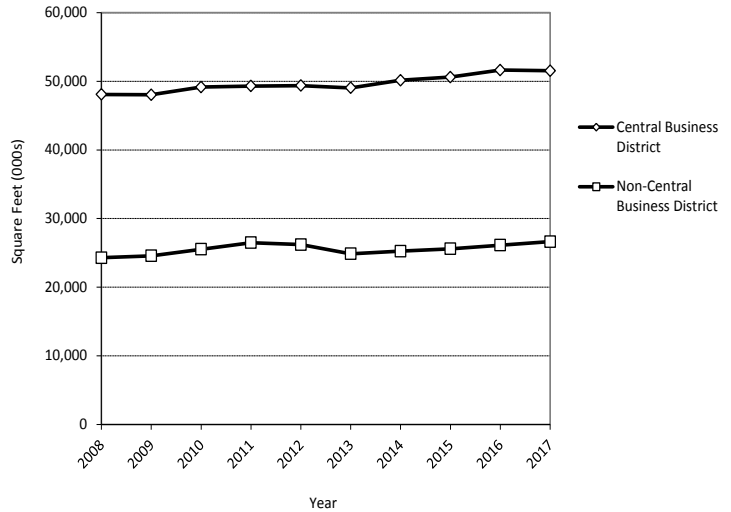
**Note:** Other represents those permits still in the pipeline.  
**Sources:** San Francisco Planning Department; Department of Building Inspection

**Table & Figure 6.5**  
**TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 2008-2017**

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.

- 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



**Building Square Footage (000s)**

Location	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Central Business District	48,084	48,039	49,158	49,310	49,368	49,048	50,154	50,604	51,633	51,535
Non-Central Business District	24,300	24,569	25,539	26,488	26,205	24,871	25,252	25,602	26,133	26,633
<b>TOTAL</b>	<b>72,384</b>	<b>72,608</b>	<b>74,697</b>	<b>75,798</b>	<b>75,573</b>	<b>73,919</b>	<b>75,406</b>	<b>76,206</b>	<b>77,766</b>	<b>78,168</b>

**Percentage Change**

Location	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Central Business District	-0.1	2.3	0.3	0.1	-0.6	2.3	0.9	2.0	-0.2
Non-Central Business District	1.1	3.9	3.7	-1.1	-5.1	1.5	1.4	2.1	1.9
<b>TOTAL</b>	<b>0.3</b>	<b>2.9</b>	<b>1.5</b>	<b>-0.3</b>	<b>-2.2</b>	<b>2.0</b>	<b>1.1</b>	<b>2.0</b>	<b>0.5</b>



## Select Areas for Land Use Tables

0 Miles 1

**MAP 6.2**

**Table 6.6**  
**LAND USE SQUARE FOOTAGE BY SELECT AREAS, 2017**

This table conveys the area square footage for each land use category for 17 select areas in San Francisco. These plan areas are shown in Map 6.2.

**Land Square Footage (000s)**

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	361.3	192.2	13.2	263.5	63.1	2,904.9	0.0	76.6	2,532.2	1,383.43	0.0	7,790.3
Bayview	18,186.1	1,387.1	1,242.5	1,692.2	12,687.6	8,053.9	10.0	5,651.5	11,884.1	8,669.0	478.7	69,942.8
C-3	198.6	516.4	2,947.6	1,141.8	263.3	196.2	1,197.9	1,976.5	306.6	297.0	30.6	9,072.6
Central Waterfront	471.0	414.5	353.8	247.8	8,601.3	59.1	2.0	1,077.9	2,894.8	2,763.8	2.4	16,888.5
East Soma	1,476.8	1,436.5	1,352.3	370.1	1,049.6	230.2	61.4	924.2	733.7	1,309.3	64.1	9,008.1
Hunters Point Shipyard	0.0	0.0	0.0	0.0	18,141.6	975.8	0.0	0.0	0.0	2,618.9	0.0	21,736.3
Market/Octavia	5,109.7	1,086.4	676.2	736.8	425.1	989.5	78.3	444.5	573.2	814.3	10.2	10,944.3
Mid-Market	310.8	82.9	657.5	227.6	167.0	67.1	142.3	252.0	0.0	423.2	0.0	2,330.4
Mission	12,061.5	2,134.3	618.3	1,493.0	2,751.8	2,041.0	71.5	1,829.7	637.6	955.5	138.0	24,692.2
Mission Bay	3,440.4	343.8	151.6	197.9	426.3	793.1	0.0	254.1	268.0	5,482.9	164.7	11,522.9
Rest of the City	362,967.0	16,718.3	4,888.0	8,270.0	6,678.7	54,133.2	2,224.0	8,791.8	267,538.6	19,993.8	3,022.1	755,225.6
Rincon Hill	272.9	375.7	280.1	49.8	29.0	187.5	0.0	56.4	7.0	373.9	0.0	1,632.3
Showplace Sq/Potrero Hill	7,990.4	848.9	682.4	613.4	2,041.8	1,782.5	0.0	1,814.8	683.1	3,374.3	53.0	19,884.5
Transbay	76.6	21.7	510.4	125.9	37.5	16.1	18.6	138.0	0.0	822.5	0.0	1,767.3
Van Ness	744.7	538.1	178.4	354.4	292.6	234.7	236.6	351.0	0.0	78.2	0.0	3,008.7
Visitacion Valley	8,452.9	148.5	281.3	106.6	957.2	372.1	0.0	32.9	625.7	768.7	104.3	11,850.3
West Soma	1,002.9	652.0	657.3	875.0	2,334.6	666.9	83.3	1,100.9	10.2	1,304.5	0.0	8,687.5
Yerba Buena	106.0	153.0	173.1	162.7	25.9	229.9	223.3	640.2	330.0	52.7	0.0	2,096.8
<b>TOTAL</b>	<b>423,229.7</b>	<b>27,050.3</b>	<b>15,664.2</b>	<b>16,888.4</b>	<b>56,974.1</b>	<b>73,933.7</b>	<b>4,394.3</b>	<b>25,413.0</b>	<b>289,024.9</b>	<b>51,485.6</b>	<b>4,068.1</b>	<b>988,081.2</b>

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TABLE 6.6 LAND USE SQUARE FOOTAGE BY SELECT AREAS, 2017 (CONTINUED)

**Percentage Distribution by Select Area**

<i>Plan Area</i>	<i>Residential</i>	<i>Mixed Res</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>CIE</i>	<i>Hotel</i>	<i>Mixed Uses</i>	<i>Public/OS</i>	<i>Vacant</i>	<i>Other</i>	<i>TOTAL</i>
Balboa	4.6	2.5	0.2	3.4	0.8	37.3	0.0	1.0	32.5	17.8	0.0	100.0
Bayview	26.0	2.0	1.8	2.4	18.1	11.5	0.0	8.1	17.0	12.4	0.7	100.0
C-3	2.2	5.7	32.5	12.6	2.9	2.2	13.2	21.8	3.4	3.3	0.3	100.0
Central Waterfront	2.8	2.5	2.1	1.5	50.9	0.3	0.0	6.4	17.1	16.4	0.0	100.0
East Soma	16.4	15.9	15.0	4.1	11.7	2.6	0.7	10.3	8.1	14.5	0.7	100.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	83.5	4.5	0.0	0.0	0.0	12.0	0.0	100.0
Market/Octavia	46.7	9.9	6.2	6.7	3.9	9.0	0.7	4.1	5.2	7.4	0.1	100.0
Mid-Market	13.3	3.6	28.2	9.8	7.2	2.9	6.1	10.8	0.0	18.2	0.0	100.0
Mission	48.8	8.6	2.5	5.9	11.1	8.3	0.3	7.4	2.6	3.9	0.6	100.0
Mission Bay	29.9	3.0	1.3	1.7	3.7	6.9	0.0	2.2	2.3	47.6	1.4	100.0
Rest of the City	48.1	2.2	0.6	1.1	0.9	7.2	0.3	1.2	35.4	2.6	0.4	100.0
Rincon Hill	16.7	23.0	17.2	3.1	1.8	11.5	0.0	3.5	0.4	22.9	0.0	100.0
Showplace Sq/Potrero Hill	40.2	4.3	3.4	3.1	10.3	9.0	0.0	9.1	3.4	17.0	0.3	100.0
Transbay	4.3	1.2	28.9	7.1	2.1	0.9	1.1	7.8	0.0	46.5	0.0	100.0
Van Ness	24.8	17.9	5.9	11.8	9.7	7.8	7.9	11.7	0.0	2.6	0.0	100.0
Visitacion Valley	71.3	1.3	2.4	0.9	8.1	3.1	0.0	0.3	5.3	6.5	0.9	100.0
West Soma	11.5	7.5	7.6	10.1	26.9	7.7	1.0	12.7	0.1	15.0	0.0	100.0
Yerba Buena	5.1	7.3	8.3	7.8	1.2	11.0	10.7	30.5	15.7	2.5	0.0	100.0
<b>TOTAL</b>	<b>42.8</b>	<b>2.7</b>	<b>1.6</b>	<b>1.7</b>	<b>5.8</b>	<b>7.5</b>	<b>0.4</b>	<b>2.6</b>	<b>29.3</b>	<b>5.2</b>	<b>0.4</b>	<b>100.0</b>

**Percentage Distribution by Land Use Category**

<i>Plan Area</i>	<i>Residential</i>	<i>Mixed Res</i>	<i>Office</i>	<i>Retail</i>	<i>PDR</i>	<i>CIE</i>	<i>Hotel</i>	<i>Mixed Uses</i>	<i>Public/OS</i>	<i>Vacant</i>	<i>Other</i>	<i>TOTAL</i>
Balboa	0.1	0.7	0.1	1.6	0.1	3.9	0.0	0.3	0.9	2.7	0.0	0.8
Bayview	4.3	5.1	7.9	10.0	22.3	10.9	0.2	22.2	4.1	16.8	11.8	7.1
C-3	0.0	1.9	18.8	6.8	0.5	0.3	27.5	7.8	0.1	0.6	0.8	0.9
Central Waterfront	0.1	1.5	2.3	1.5	15.1	0.1	0.0	4.2	1.0	5.4	0.1	1.7
East Soma	0.3	5.3	8.6	2.2	1.8	0.3	1.4	3.6	0.3	2.5	1.6	0.9
Hunters Point Shipyard	0.0	0.0	0.0	0.0	31.8	1.3	0.0	0.0	0.0	5.1	0.0	2.2
Market/Octavia	1.2	4.0	4.3	4.4	0.7	1.3	1.8	1.7	0.2	1.6	0.3	1.1
Mid-Market	0.1	0.3	4.2	1.3	0.3	0.1	3.3	1.0	0.0	0.8	0.0	0.2
Mission	2.8	7.9	3.9	8.6	4.8	2.8	1.6	7.2	0.2	1.9	3.4	2.5
Mission Bay	0.8	1.3	1.0	1.2	0.7	1.1	0.0	1.0	0.1	10.6	4.0	1.2
Rest of the City	85.8	61.8	31.2	49.0	11.7	73.2	51.1	34.6	92.6	38.8	74.3	76.4
Rincon Hill	0.1	1.4	1.8	0.3	0.1	0.3	0.0	0.2	0.0	0.7	0.0	0.2
Showplace Sq/Potrero Hill	1.9	3.1	4.4	3.6	3.6	2.4	0.0	7.1	0.2	6.6	1.3	2.0
Transbay	0.0	0.1	3.3	0.7	0.1	0.0	0.4	0.5	0.0	1.6	0.0	0.2
Van Ness	0.2	2.0	1.1	2.1	0.5	0.3	5.4	1.4	0.0	0.2	0.0	0.3
Visitacion Valley	2.0	0.5	1.8	0.6	1.7	0.5	0.0	0.1	0.2	1.5	2.6	1.2
West Soma	0.2	2.4	4.2	5.2	4.1	0.9	1.9	4.3	0.0	2.5	0.1	0.9
Yerba Buena	0.0	0.6	1.1	1.0	0.0	0.3	5.1	2.5	0.1	0.1	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:** Mixed Res = Mixed Residential; PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Public/OS = Public and Open Space;  
**Sources:** San Francisco Office of the Assessor-Recorder; San Francisco Planning Department; Dun & Bradstreet





# 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 Municipal Transportation Agency (SFMTA), 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 six years are contained in *Table 7.1*. 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).

## 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.

The parking entitlement data was previously included in *Table 7.2*. However, reliable data has not been available since 2014, the table has been removed from this report until more accurate figures can be obtained.

### 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*.

### 7.4 TRANSIT RIDERSHIP

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 SFMTA, provides periodic ridership volumes for all of its lines. These data, covering average daily volumes during the current fiscal year compared to five years prior, are reported in *Table 7.4*. This table provides ridership data for all of MUNI's existing transit routes throughout the city, including and light rail service.

### 7.5 TIDF REVENUES

The SFMTA 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 SFMTA. 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 application of this fee was originally limited to all new and converted office space in downtown San Francisco, in 2004, 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 current year dollars.

**Table 7.1 MODE SPLIT FOR COMMUTERS, 2012–2017**

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					
	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017
Drive Alone	36.3	36.4	34.2	35.3	33.7	32.4	35.0	33.3	33.0	33.6	33.2	32.7
Carpool/Vanpool	7.7	6.8	7.1	6.5	6.7	6.2	9.7	9.4	9.3	8.6	8.9	8.2
Transit	33.1	32.7	34.0	34.7	34.3	34.7	38.3	39.4	40.0	40.3	40.1	40.3
Walk	9.8	10.9	11.2	10.4	11.1	12.0	7.1	7.8	7.7	7.5	7.4	8.1
Bicycle	3.8	3.8	4.4	4.3	3.9	3.1	2.7	2.7	3.0	3.1	2.7	2.2
Work at Home	6.7	6.8	7.0	6.2	6.4	7.2	4.9	4.9	4.8	4.3	4.3	4.9
Other	2.6	2.6	2.1	2.7	4.0	4.4	2.2	2.6	2.2	2.7	3.4	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>	<b>100.0</b>	<b>100.0</b>

Source: US Census, American Community Surveys.

**Table 7.3**  
**PRIVATE VEHICLE OCCUPANCY IN San Francisco, 2011–2017**

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.

<i>Population</i>	2011	2012	2013	2014	2015	2016	2017
San Francisco Employees	1.13	1.14	1.14	1.14	1.14	1.14	1.13

Sources: US Census American Community Survey.

**Table 7.4**  
**TRANSIT**  
**RIDERSHIP ON**  
**MUNI LINES,**  
**2012 & 2017**

Table 7.4 presents data on average daily ridership on MUNI lines for 2012 and 2017.

**Daily Ridership by Route**

<i>Route Nos.</i>	<i>Route Name</i>	2012	2017	<i>Difference</i>	<i>% Change</i>
1, 1AX, 1BX	California	28,870	26,200	-2,670	-9.2%
2	Clement	5,853	5,200	-653	-11.2%
3	Jackson	3,376	2,500	-876	-25.9%
5, 5R	Fulton	17,158	19,600	2,442	14.2%
6	Parnassus	10,543	7,800	-2,743	-26.0%
7, 7R, 7X	Haight-Noriega	13,566	13,000	-566	-4.2%
8, 8AX, 8BX	Bayshore	40,050	34,200	-5,850	-14.6%
9, 9R	San Bruno	15,453	21,400	5,947	38.5%
10	Townsend	5,631	6,500	869	15.4%
12	Folsom	4,281	6,300	2,019	47.2%
14, 14R, 14X	Mission	44,162	48,000	3,838	8.7%
18	46th Avenue	3,758	3,200	-558	-14.8%
19	Polk	7,699	6,900	-799	-10.4%
21	Hayes	11,353	6,600	-4,753	-41.9%
22	Fillmore	17,772	16,000	-1,772	-10.0%
23	Monterey	4,278	3,800	-478	-11.2%
24	Divisadero	10,662	12,000	1,338	12.5%
25	Treasure Island	3,455	2,800	-655	-19.0%
27	Bryant	7,939	6,200	-1,739	-21.9%
28, 28R	19th Avenue	14,423	16,200	1,777	12.3%
29	Sunset	15,376	17,500	2,124	13.8%
30, 30X	Stockton	35,238	22,400	-12,838	-36.4%
31, 31AX, 31BX	Balboa	10,985	10,800	-185	-1.7%
33	Stanyan	6,101	5,700	-401	-6.6%
35	Eureka	850	1,100	250	29.4%
36	Teresita	1,246	1,500	254	20.4%
37	Corbett	1,742	2,200	458	26.3%
38, 38R, 38AX, 38BX	Geary	55,042	52,900	-2,142	-3.9%
39	Coit	859	500	-359	-41.8%
41	Union	3,533	3,500	-33	-0.9%
43	Masonic	14,600	12,600	-2,000	-13.7%
44	O'Shaughnessy	15,875	15,500	-375	-2.4%
45	Union-Stockton	12,149	10,000	-2,149	-17.7%

Source:  
San Francisco Municipal  
Transportation Agency

CONTINUED >



TABLE 7.4  
TRANSIT RIDERSHIP  
ON MUNI LINES, 2012  
& 2017 (CONTINUED)

### Daily Ridership by Route

Route Nos.	Route Name	2012	2017	Difference	% Change
47	Van Ness	12,338	11,900	-438	-3.5%
48	Quintara–24th Street	11,210	7,600	-3,610	-32.2%
49	Van Ness–Mission	27,427	24,900	-2,527	-9.2%
52	Excelsior	2,050	2,000	-50	-2.4%
54	Felton	6,628	6,800	172	2.6%
55	16th Street	N/A	1,900	N/A	N/A
56	Rutland	605	400	-205	-33.9%
57	Parkmerced	735	2,100	1,365	185.7%
66	Quintara	687	800	113	16.4%
67	Bernal Heights	1,253	1,400	147	11.7%
80X	Gateway Express	12	N/A	N/A	N/A
81X	Caltrain Express	251	100	-151	-60.2%
82X	Levi Plaza	1,060	500	-560	-52.8%
83X	Mid-Market Express	0	300	300	N/A
88	BART Shuttle	431	400	-31	-7.2%
90	Owl	217	300	83	38.2%
91	Owl	497	700	203	40.8%
E	Embarcadero	N/A	2,000	N/A	N/A
F	Market	23,449	19,400	-4,049	-17.3%
J	Church	14,988	16,900	1,912	12.8%
K/T	Ingleside/Third	31,637	41,700	10,063	31.8%
L	Taraval	26,566	33,800	7,234	27.2%
M	Ocean View	27,270	31,600	4,330	15.9%
N, NX	Judah	40,529	47,300	6,771	16.7%
Cable Cars		20,162	16,600	-3,562	-17.7%
	<b>Total</b>	<b>693,881</b>	<b>692,000</b>	<b>-1,881</b>	<b>-0.3%</b>

**Table 7.5**  
**TRANSIT IMPACT**  
**DEVELOPMENT FEE**  
**(TIDF) REVENUE**  
**COLLECTED (INFLATION-**  
**ADJUSTED), FISCAL**  
**YEARS 2008–2017**

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2008 (July 1, 2007 - June 30, 2008) in 2017 dollars.

Fiscal Year	Fee Structure	Collections (2017 \$)
2007-2008	2007 Ordinance	\$1,098,107
2008-2009	2007 Ordinance	\$5,471,656
2009-2010	2007 Ordinance	\$2,215,216
2010-2011	2010 Ordinance	\$1,234,994
2011-2012	2010 Ordinance	\$1,939,139
2012-2013	2010/2013 Ordinance	\$5,274,845
2013-2014	2013/2014 Ordinance	\$13,722,746
2014-2015	2014 Ordinance	\$14,217,513
2015-2016	2014 Ordinance	\$38,736,871
2016-17	2014 Ordinance	\$48,125,132

Source: San Francisco Controller's Office





# Acknowledgements

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