



SAN FRANCISCO PLANNING DEPARTMENT

January 16, 2019

Dear Planning Commissioners:

The San Francisco Planning Department would like to present you with a copy of the recently published *2018 Commerce and Industry Inventory*. This annual publication provides information on the city's economy and land use with data through 2018.

The *2017 Commerce and Industry Inventory* is divided into four sections: (1) About the 2018 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_2018.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).

Sincerely yours,

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

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1. Albericci Allison, SF Planning
2. Ken Qi, SF Planning
3. Ken Qi, SF Planning
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2018

SAN FRANCISCO COMMERCE & INDUSTRY INVENTORY

SAN FRANCISCO PLANNING DEPARTMENT
DECEMBER 2019

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About the 2018 Commerce & Industry Inventory

This is the 25th *Commerce & Industry Inventory* prepared by the San Francisco Planning Department. It presents findings and data on economic activities in San Francisco from 2009 through 2018, 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 and other analyses*.

The 2018 Commerce & Industry Inventory is organized as follows:

1. **About the 2018 Commerce & Industry Inventory**
2. **Infographic Highlights**
3. **Findings: San Francisco Economy in 2018**
4. **2018 Data Appendix**

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

FORMAT OF THE 2018 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 2018** summarizes key points for 2018. The **Appendix** contains the full data tables and describes the methodology.

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.

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, 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. C&I 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 that serve the local and regional visitor populations.
- The **South of Market (SoMa)** district includes Mission Bay, Showplace, Potrero Hill and the Central Waterfront. It has a mixed of office, institutional, retail and PDR. It has seen some of the greatest of change and densification over the past 20 years.
- The **Bayview** district houses the City's most significant areas of PDR activities, including Port maritime industry.
- 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 the 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/Visitor, (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), 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. Many activities also use large open lot areas for storage of goods, vehicles and operational needs.
- **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 transit lodging such as hotel, motel, or bed and breakfast.
- **Cultural/Institutional/Educational (CIE) activities** cover the social spectrum of economy by including entertainment, health, educational services and artistic activities (excludes art production). This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to smaller businesses like nightclubs. These activities are more geographically disparate than the other categories.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, has been tracked separately beginning in 2009. 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 employ-

ees 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. This reclassification requires attention and recognition of the shift when comparing some data series from before and after 2014.

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. Note that Industry Groups do not necessarily correspond to Land Use categories. Any Industry Group could use space or have workers occupied in space that is categorized under different land use categories. For instance, companies in San Francisco categorized in the Farm or Health industry groups could use Office Space for their local employees.

Infographic Highlights

2018 Commerce & Industry Inventory

SUMMARY

2018

Change from 2017

JOBS

740,800 ▲3.6%

UNEMPLOYMENT RATE

2.3% ▼ FROM 2.9%

ESTABLISHMENTS

61,000 ▲2.4%

TOTAL WAGES CITYWIDE

\$87.7B ▲6.8%

AVERAGE WAGE PER JOB

\$118,000 ▲3.0%

BUILDING PERMITS

29,765 ▲0.8%

CONSTRUCTION SPENDING

\$4.6B ▲15%

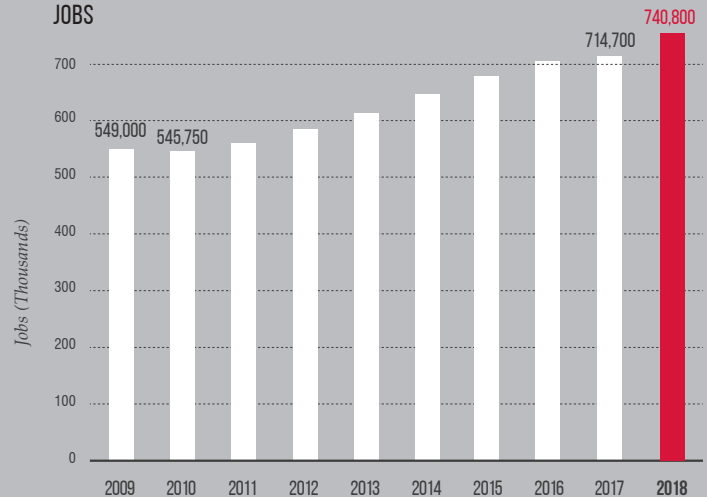
CITY REVENUE

\$6.4B ▲7%

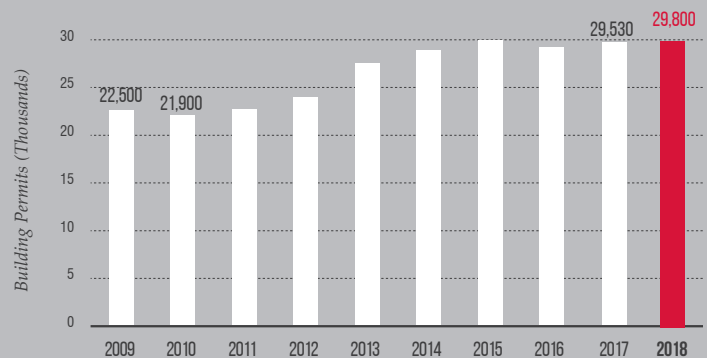
CITY EXPENDITURE

\$5.8B ▲10%

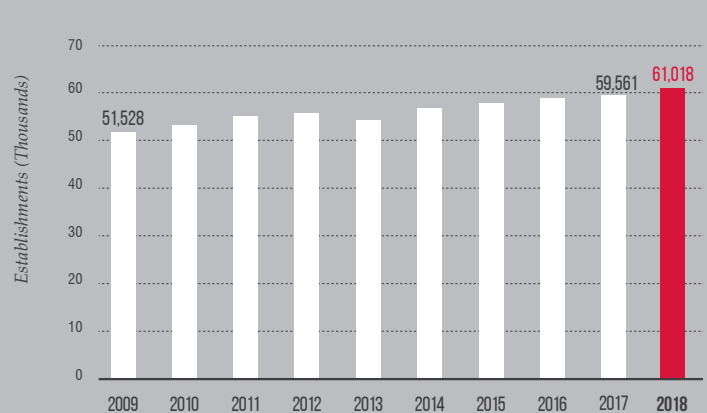
JOBS



BUILDING PERMITS PROCESSED (EXCLUDING FILED)

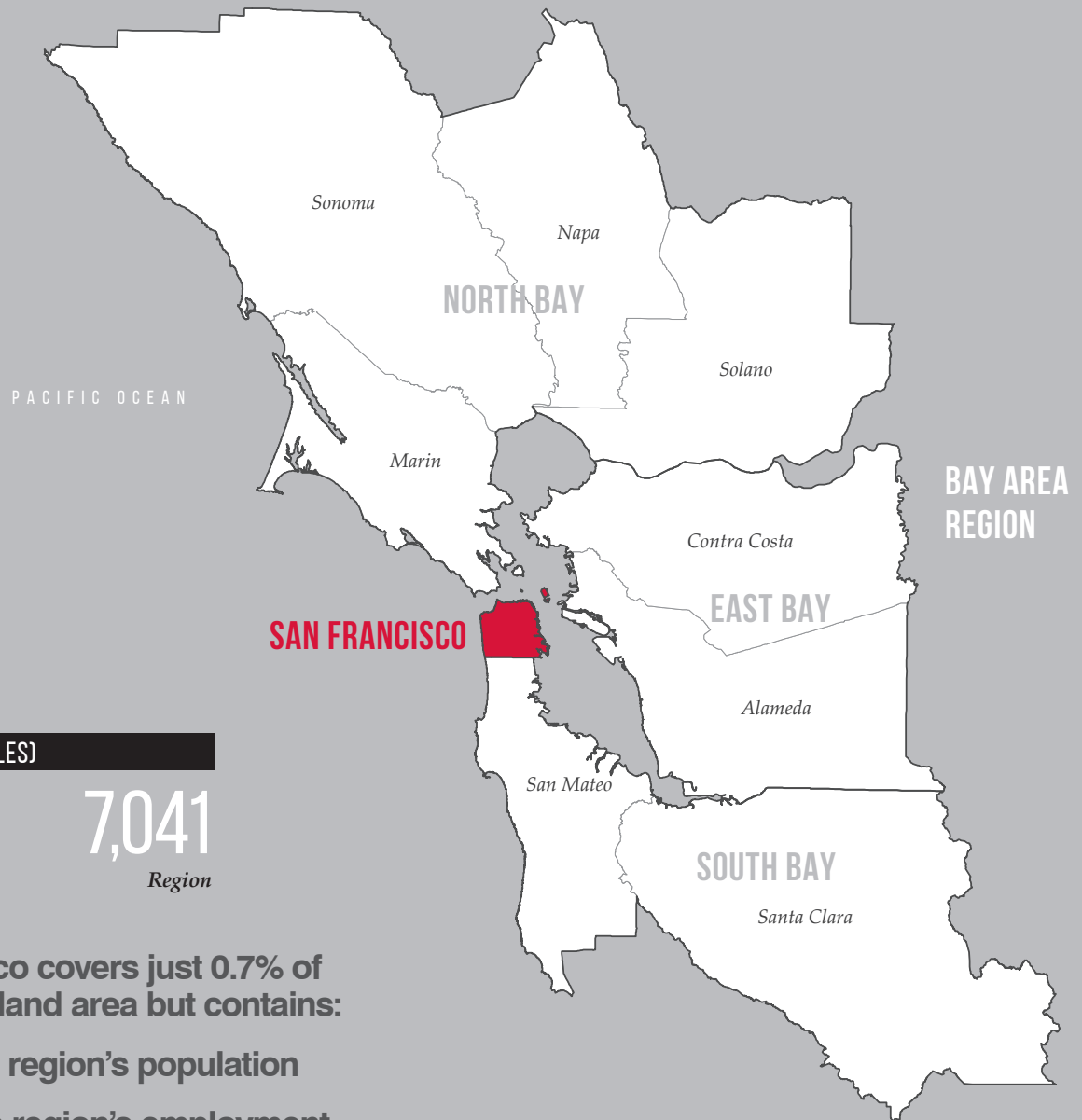


ESTABLISHMENTS



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
- 19% of the region's employment

2018 POPULATION

883,900 *San Francisco* **7,783,500** *Region*



POPULATION CHANGE

3.2% [▲] *San Francisco* 2009–2018 (10 YEAR) **4.3%** [▲] *Region*

0.1% [▼] *San Francisco* 2017–2018 (1 YEAR) **0.14%** [▲] *Region*

Population growth rate is slowing in the city and region.

2018 UNEMPLOYMENT RATE

2.3% *San Francisco* [▼] FROM 2017

2.8% *Bay Area* [▼] FROM 2017

4.2% *State* [▼] FROM 2017

SF has a lower unemployment rate than region and State.

2018 JOBS

740,800 *San Francisco* **3,991,200** *Region*



SF's share of regional employment has increased by about 2% since 2009.

JOB GROWTH

35% [▲] *San Francisco* 2009–2018 (10 YEAR) **28%** [▲] *Region*

3.6% *San Francisco* 2017–2018 (1 YEAR) **2.0%** *Region*

Employment has grown annually since 2010 with average of 3.1%.

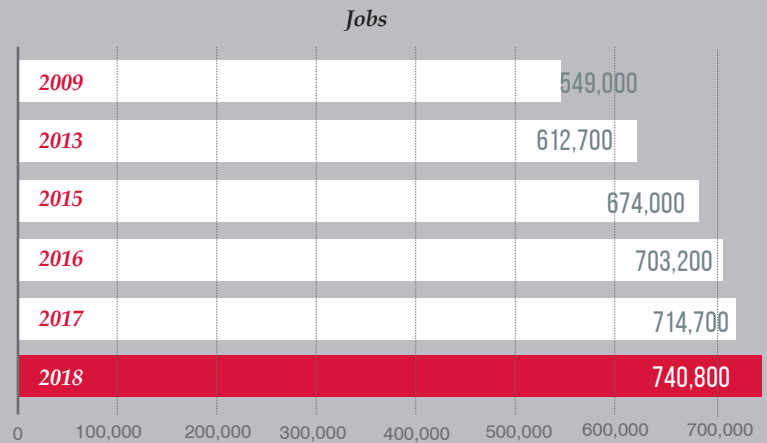
JOB GROWTH BY SECTOR 2017-18

Employment Sector	San Francisco	Region
INFORMATION	12.3%	8.5%
CONSTRUCTION	11.2%	5.4%
MANUFACTURING	0%	3.2%
PROFESSIONAL & BUSINESS SERVICES	4.5%	3.7%
EDUCATIONAL & HEALTH SERVICES	2.4%	2.0%

Of the fastest growing 5 sector in the region, SF is growing faster in 4 out 5.

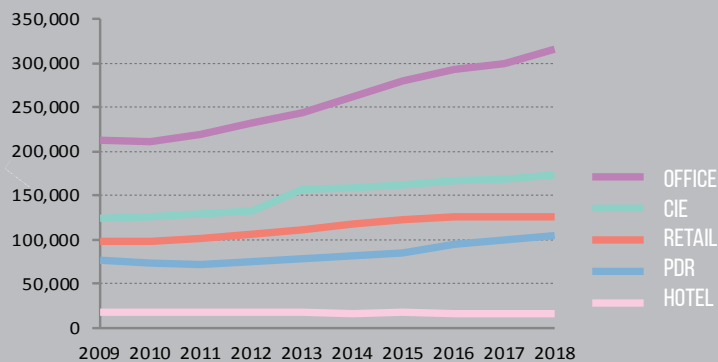
EMPLOYMENT IN SAN FRANCISCO

Employment
is up 3.6% in
the past year,
35% over
the decade.



Employment has grown steadily since 2009.

SAN FRANCISCO JOBS BY LAND USE



Employment in all land use categories has grown over the decade except for Hotel.

SHARE OF JOBS BY LAND USE

Land Use Category	2009	2017	2018
OFFICE	38%	42%	42%
RETAIL	18%	18%	17%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	14%	14%	14%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	22%	24%	23%
HOTEL	3%	2%	2%
PRIVATE HOUSEHOLDS	4%	1%	1%
	100%	100%	100%

CHANGE IN # OF JOBS

	2017-18	2009-18
OFFICE	6%	49%
RETAIL	-0.4%	28%
PDR	6%	36%
CIE	3%	39%*
HOTEL	1%	-9%
PRIVATE HOUSEHOLDS	-	*

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

See figure 3.2.4

ESTABLISHMENTS IN SAN FRANCISCO

Establishments grew 2.4% from 2017.

TOTAL ESTABLISHMENTS (2018)

61,020

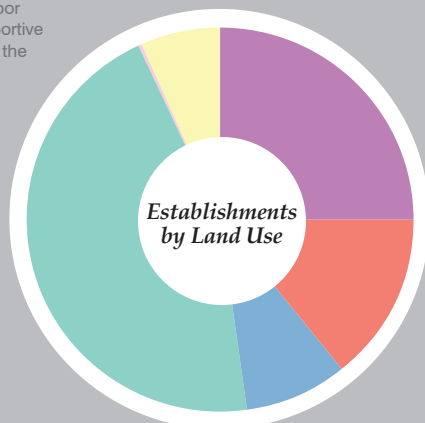
▲ 2.4%
Change from 2017

BY LAND USE CATEGORY

Non Private Household		2018	Change 2009–18	
OFFICE		15,314	25%	34%
RETAIL		8,695	14%	16%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)		5,312	9%	13%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)		27,466	45%	480%*
HOTEL		318	1%	9%
Private Household				
PRIVATE HOUSEHOLDS		3,913	6%	-83%*
		61,018	100%	▲ 18%

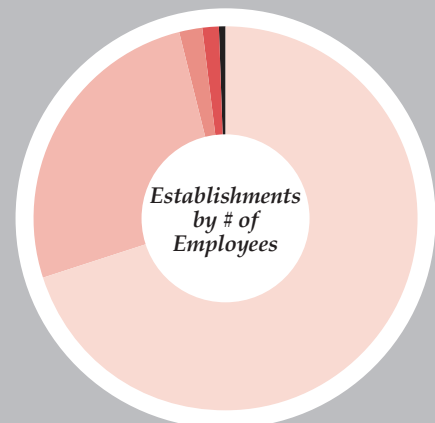
* Starting in 2014, the Bureau of Labor Statistics reclassified In-Home Supportive Services (roughly 20,000 jobs) from the Private Household category to CIE.

See figure 4.2.4



BY NUMBER OF EMPLOYEES

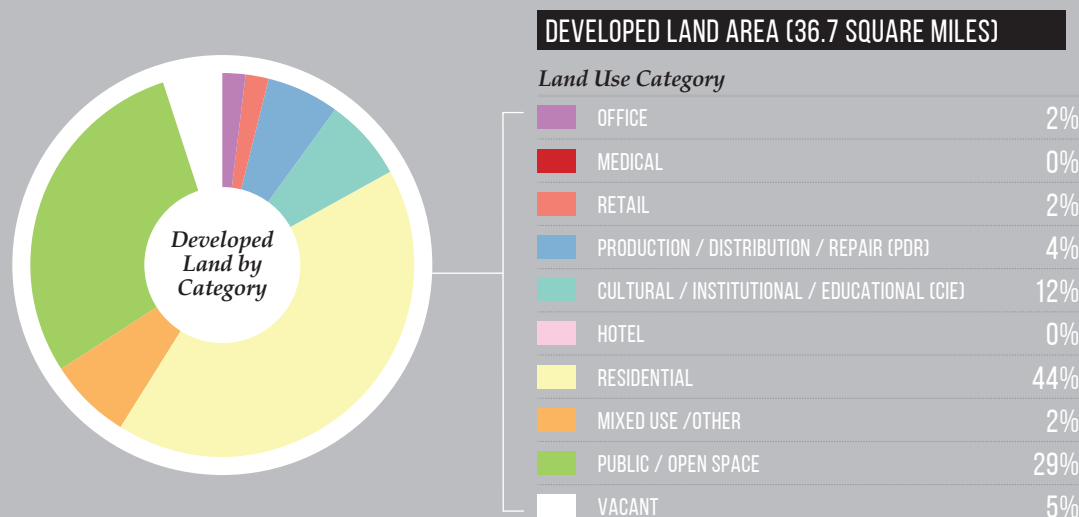
Excluding Private Household		Firms	
0–4		40,120	70%
5–49		14,728	24%
50–99		1,252	2%
100–249		648	1%
250 +		358	1%
		57,106	94%



LAND USE & BUILDING IN SAN FRANCISCO

Land Area

TOTAL LAND AREA	DEVELOPED	STREETS & FREEWAYS
47 SQ. MILES	78% 36.7 <i>Sq. Miles</i>	22%

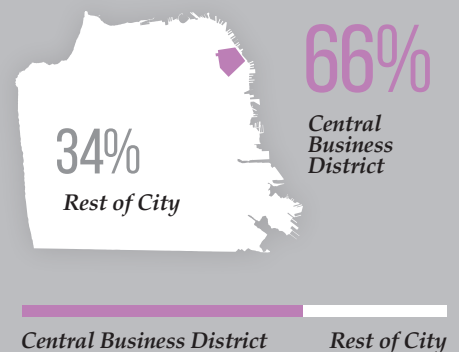


Office Space

2018 TOTAL OFFICE SPACE
82.2 M <i>Sq. ft.</i>
▲ 5.3% <i>Change from 2017</i>
▲ 13% <i>Change from 2009</i>

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

SHARE OF OFFICE SPACE



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

Building Permits

2018 BUILDING PERMITS

29,765 *Active building permits* ▲ **1%** ▲ **13%**
Change from 2017 *Change from 2009*

2018 BUILDING PERMIT STATUS

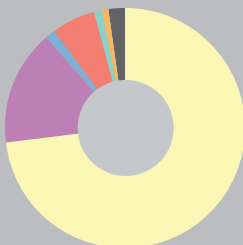
58% *Completed* 1% *Approved* 30% *Issued* 10% *Other*



BY CONSTRUCTION COST

\$4.6B ▲ **15%**
Up 599M from 2017

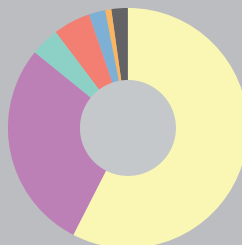
BY NUMBER OF PERMITS



Land Use Category

RESIDENTIAL	66%
OFFICE	17%
CIE	3%
RETAIL	8%
PDR	1%
HOTEL	1%
OTHER	4%

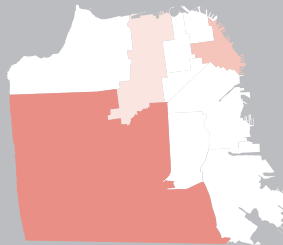
BY CONSTRUCTION COST



Land Use Category

RESIDENTIAL	52%
OFFICE	32%
CIE	3%
RETAIL	7%
PDR	2%
HOTEL	2%
OTHER	2%

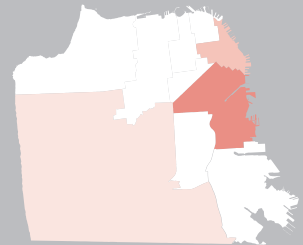
BY NUMBER OF PERMITS



District Location

SOUTHWEST	29%
FINANCIAL	14%
NORTH CENTRAL	13%

BY CONSTRUCTION COST



District Location

SOMA	25%
FINANCIAL	20%
SOUTHWEST	12%

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.

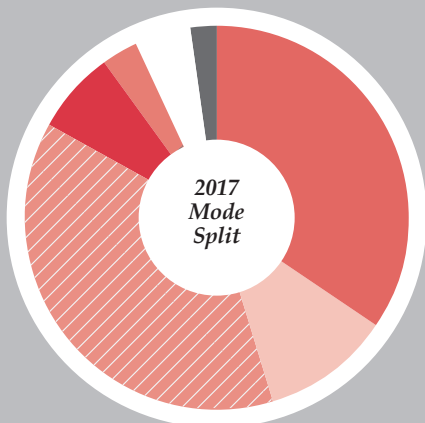
TRANSPORTATION IN SAN FRANCISCO

Transit use for commuting continues to grow.

Car commuting continues to fall.

HOW EMPLOYEES IN SAN FRANCISCO COMMUTED TO WORK

Mode	2013	2018	Change
DRIVE ALONE	33%	31%	-6%
CARPPOOL / VANPOOL	9%	9%	-3%
TRANSIT	39%	40%	1%
WALK	8%	9%	11%
BICYCLE	3%	3%	14%
WORK AT HOME	5%	4%	-13%
OTHER	3%	4%	44%



PRIVATE VEHICLE OCCUPANCY (2012–2018)

1.14 PERSONS PER VEHICLE 1.15

2012 2018

DAILY MUNI RIDERSHIP (2012–2018)

693,880 698,900

2012 2018

Daily MUNI ridership up 0.7% since 2012.

BUSIEST MUNI LINES

Line	2012 Daily Trips	2018	Change
38 GEARY	55,000	56,600	3% ▲
N JUDAH	40,500	44,200	9% ▲
14 MISSION	44,200	52,000	18% ▲

TRANSIT IMPACT DEVELOPMENT FEE REVENUE

\$15.9M FY 2017–2018 ▼ 64% FROM FY16-17

CITY GOVERNMENT

City revenues up 7%. Spending up 10%.

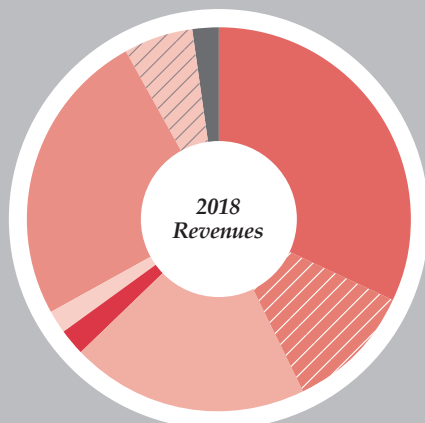
2018 CITY REVENUE

\$6.4B

▲ 7%
Change from 2017

Revenue Source

PROPERTY TAXES	\$2.2B	34%
BUSINESS TAXES	\$0.9B	14%
OTHER LOCAL TAXES	\$1.2B	19%
LICENSES, PERMITS, FINES & PENALTIES	\$0.08B	1%
INTEREST & INVESTMENT INCOME	\$0.05B	1%
RENTS & CONCESSIONS	\$0.1B	2%
INTERGOVERNMENTAL	\$1.3B	20%
CHARGES FOR SERVICES	\$0.4B	6%
OTHER	\$0.2B	3%



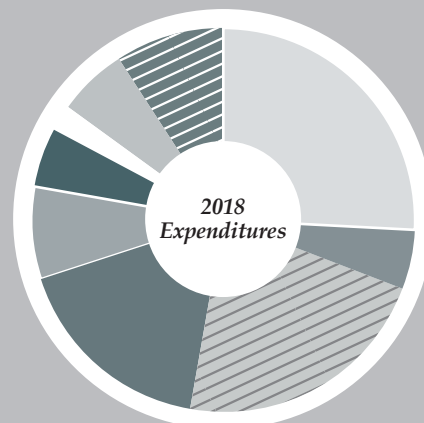
2018 CITY EXPENDITURE

\$5.8B

▲ 10%
Change from 2017

Expenditure Function

PUBLIC PROTECTION	\$1.4B	24%
PUBLIC WORKS, TRANS & COMMERCE	\$0.4B	7%
HUMAN WELFARE & NBHD DEVELOP	\$1.5B	26%
COMMUNITY HEALTH	\$0.8B	14%
CULTURE & RECREATION	\$0.4B	7%
GENERAL ADMINISTRATION & FINANCE	\$0.3B	5%
GENERAL CITY RESPONSIBILITIES	\$0.1B	2%
DEBT SERVICE	\$0.5B	9%
CAPITAL OUTLAY	\$0.3B	6%



Findings: San Francisco Economy in 2018

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 2018.

- Employment grew for the seventh straight year, from 714,700 jobs to a record-breaking 740,800 jobs. The city gained 26,100 jobs in 2018, representing 3.6% growth over the previous year.
- The unemployment rate in San Francisco continued to fall, from 2.9% to 2.3%. The region's unemployment rate for 2018 was 2.8%.
- The number of business establishments grew to 61,020 firms, up 2.4% from 2017.
- Workers' earnings in the San Francisco economy increased to \$87.7 billion, 6.8% over 2017, with average earnings per job increasing to \$118,000 per worker.
- The number of building permit applications increased by 1% from the previous year, to 29,765 applications. The estimated value or spending those projects represent in terms of project cost (not all of which will be spent locally in San Francisco) increased 15% to \$4.6 billion from 2017.
- City revenue was \$6.4 billion, up 7% over 2017, while expenditures increased 10% to \$5.8 billion.

SAN FRANCISCO IN THE REGION

City growth is faster compared to the region

San Francisco is growing faster in jobs than the region as a whole, but maintains a slightly slower population growth.

San Francisco's population reached 883,900 residents. This represents a 3.2% increase over the past decade. In comparison, the regional population of 7.78 million grew slightly faster last year, increasing 0.14% from 2017-2018, and faster over the decade (4.3%).

Employment in San Francisco grew by 3.6% in 2018, to a record 740,800 jobs. Over the past decade, this represents a 35% increase in employment in the city. In comparison, regional employment grew 2.0% in the past year, and 28% between 2009 and 2018, to 3.99 million jobs.

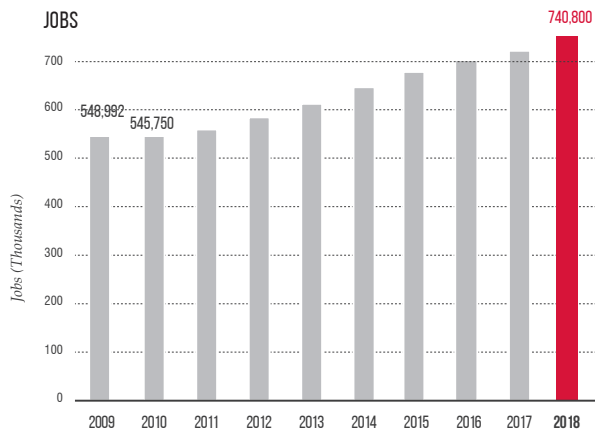
San Francisco's share of regional employment increased between 2009 and 2018, from 18.2% of all jobs in the region to 19%. The *Fastest Growing Job Sectors 2018* table below shows San Francisco's job growth from 2017 to 2018 is faster than the region's in all but one of the five job sectors in San Francisco Information, Construction, Trade & Transportation and Leisure & Hospitality).

San Francisco's declining unemployment rate of 2.3% in 2018 was lower than the regional rate of 2.8%, the State rate of 4.2%.

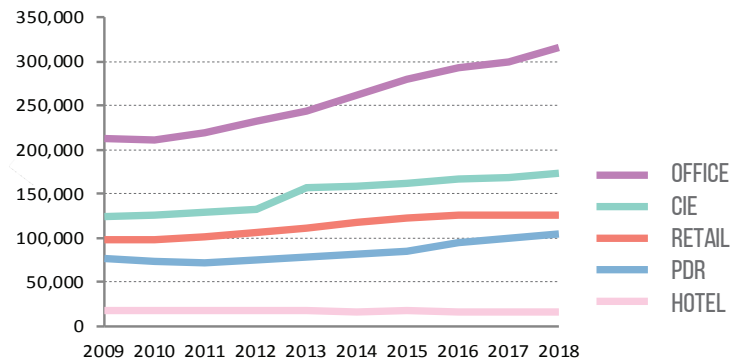
Job Sectors Growth 2018

<i>Employment Sector</i>	<i>San Francisco</i>	<i>Comparison</i>	<i>Region</i>
Information	12.3%	Slower	8.5%
Construction	11.2%	Slower	5.4%
Financial Activities	2.5%	Slower	0.2%
Trade & Transportation	1.4%	Faster	-1.3%
Leisure & Hospitality	-0.6%	Slower	1.3%
Overall Job Growth	3.1%	Slower	2.0%

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, following 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 740,800 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.¹ Only hotel jobs show a longer term decline over the full decade, and continued decline from 2016 to 2018 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 2009 and 2018 (see *Employment by Land Use* table below) with the proportion of office jobs rising (from 39% to 43% of all jobs) as PDR jobs remains the same at 14%. Jobs in Office, Retail, PDR and CIE make up 97% of all the jobs in the City. Over the past decade, Office sector is the only one growing in proportion.

Employment by Land Use

Land Use Category	Sector Shares			Rate of Change	
	2009	2017	2018	2009-18	2017-18
Office	39%	42%	43%	49%	6%
Retail	18%	18%	17%	28%	-0.4%
PDR	14%	13%	14%	36%	6%
Hotel	3%	2%	2%	-8.6%	1%
CIE	23%	24%	23%	39%	2.7%
Pvt HH	3.5%	1%	1%	-77%	-25.6%
TOTAL	548,992	714,697	740,774	35%	3.6%

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 61,020 establishments in 2018, a 2.4% increase from 2017. Approximately 6% of these, or 3,913 establishments, were private households,² 23.8% decrease from 5,132 in 2017, 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 57,105 non-household firms make up 94% of San Francisco establishments in 2018. By land use category, 45% are CIE, 25% are Office land uses, 14% are Retail, 9% 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 a 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 2009–2018

Land Use	Number			Share 2018	Change	
	2009	2017	2018		2009-18	2017-18
Office	11,419	13,989	15,314	25%	34%	9%
Retail	7,496	8,464	8,695	14%	16%	3%
PDR	4,718	4,878	5,312	9%	13%	9%
Hotel	292	306	318	1%	9%	4%
CIE	4,739	26,792	27,466	45%	480%	3%
Subtotal	28,664	54,429	57,105		99%	5%
Pvt HH	22,864	5,132	3,913	7%	-83%	-24%
TOTAL	51,528	59,561	61,018		18%	2.4%

2018 Non-Private Household Establishments by Size

# of Employees	Number of Firms	Share
0-4	40,120	70%
5-49	14,728	26%
50-99	1,252	2%
100-249	648	1%
250+	358	1%
TOTAL	57,106	100%

MONETARY TRANSACTIONS

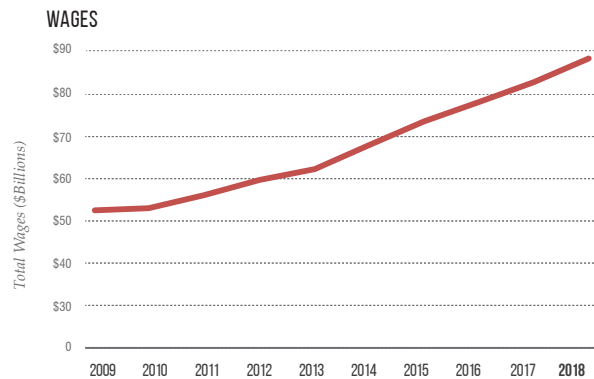
Wages

Wage and salary workers in San Francisco earned \$87.7 billion in 2018, up 6.8% from 2017 and 68% from 2009 (inflation adjusted). Total wages followed the larger trend of the economy, growing when employment grew and dipping during the last recession. Approximately 64% (\$56B) of the total is earned by office workers with the remainder earned by workers in the following land use sectors: 14% in CIE, 14% in PDR, 6% in Retail, and 1% in Hotel. The average wage in San Francisco is \$118,000, with office workers earning the highest average wage (\$178,420), followed by PDR workers (\$120,283). Workers in CIE, Hotel, and Retail earn less than the citywide average, at \$70,805, \$52,561, and \$42,716, respectively, while Private Household workers average a wage of \$50,278.

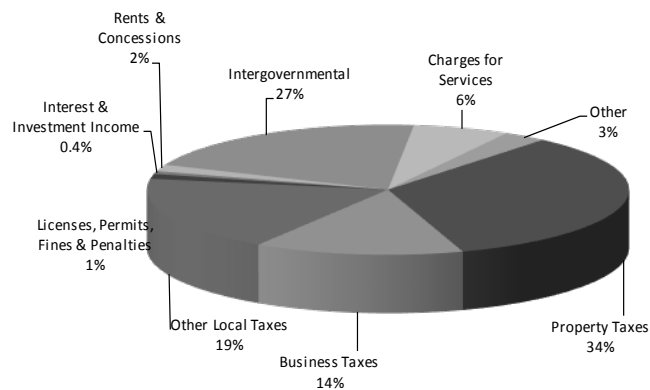
City Revenues and Expenditures

In Fiscal Year 2018 (July 1, 2017 through June 30, 2018), City revenues amounted to \$6.4B, up 7% over 2017. City expenditures were lower than revenues, at \$5.8B, and grew 10% over 2017. Property Taxes were the City's largest revenue source, making up 34% of total revenue, and Public Protection (24% of all expenditures) was the highest City expenditure category.

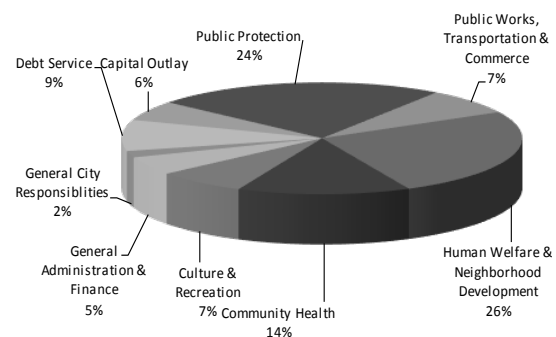
Total Wages (2018 \$s)



City Revenue 2018 (\$6.4 Billion)



City Expenditures 2018 (\$5.8 Billion)



LAND AREA AND BUILDING

Land Area

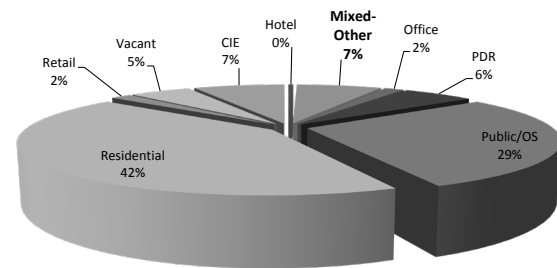
San Francisco has 46.9 square miles of land area, of which 78% is developed, while the remaining 22% are used for streets or freeways. Residential uses form the majority of San Francisco's land use footprint, occupying 44% of the city's land area, followed by Public and Open Space at 29%, and Commercial uses at 18.6% (3.9% PDR, 2% Office, 0.4% Hotel, and 12.3% CIE). Mixed uses occupy 2% of the area while 5% of land area is vacant.

Building Permit Applications

In 2018, there were 29,765 active building permit applications in San Francisco, an increase of 0.8% from 2017. Approximately 97% 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 \$4.6 billion in 2018, a 15% increase from 2017 (\$4.0B) but a 109% increase over 2009 (\$1.5B). As shown in *Building Permit Applications by Type 2018* below, permits for new construction, despite making up less than 1% of all permits, represented 39% or \$1.8B in value, while permits for demolition and construction, which make up 97% of all permits, represented \$2.8B, or 60%.

Overall, most active permits were for Residential land uses (66%), followed by 17% for Office and 8% for Retail uses. In terms of construction cost, 52% of the building permit applications' cost was for residential projects,

Developed Land Area (988MSF)



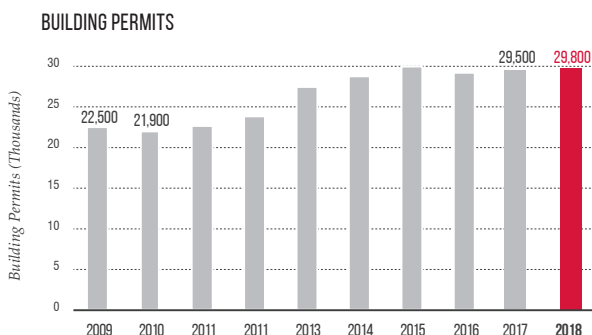
while 32% was for Office and 7% for Retails uses. Residential permits were more numerous but smaller in scope, while office projects tended to have higher construction costs.

Approximately 58% of active building permit applications completed construction in 2018, with another 31% 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 (29% of the total), followed by the Financial and North Central (14%, 13%) C&I districts. The C&I districts with the highest concentration of construction costs were the SOMA (25%) and Financial (20%) 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 9.7 msf of office space since 2009, an 13% increase. The CBD added 6.0 msf of office space, an increase of 12%.

Building Permit Applications



Building Permit Applications by Type 2018

Land Use	All Permits		New Construction Permits		Demolition + Alteration Permits	
	Number	Value	Number	Value	Number	Value
Office	17%	32%	0.01%	5%	17%	27%
Retail	8%	7%	0.03%	0%	8%	6%
PDR	1%	2%	0.03%	1%	1%	1%
Hotel	1%	3%	0.00%	1%	1%	2%
CIE	3%	3%	0.01%	1%	3%	2%
Residential	66%	52%	0.38%	31%	66%	21%
Other	4%	2%	0.01%	0%	1%	1%
Total	29,765	\$4.6b	140	\$1.8b	28,953	\$2.8b
Share of total	100%	100%	0.47%	39%	97%	60%

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).

Commute Mode Split

Data on mode split from 2013 and 2018 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 2018, 31% of commute trips were made “driving alone,” down 2 points from 33% in 2011 and 2017. Walk and Bicycle both increase by 1% while Trainsit remained at 40%.

Private Vehicle Occupancy

Private vehicle occupancy during commute trips for workers commuting to San Francisco jobs (from within and outside the city) between 2017 and 2018 increased from 1.13 to 1.15, indicating commuters are back in carpooling.

Daily Transit Ridership

Muni ridership remained steady from 2012 to 2018, increasing slightly to 698,900 average daily rides. The 38-Geary lines continue to have the highest ridership, with 56,600 average daily trips, followed by the 14-Mission lines at 51,900 trips and the N-Judah at 44,200 trips, and (see Table 7.4 in the Appendix for details).

Transit Development Impact Fee

The Transit Impact Development Fee (TIDF) revenue was \$18.4 million in FY2018, down from \$49.6 million in FY2017. Annual TIDF revenue can vary widely, as the amount collected is based on the amount of development that occurs. Total revenues collected since FY2006 amount to \$158.8 million.

Commute Mode Split - San Francisco Employees

	2013	2017	2018	2013-2018	2017-2018
Drive Alone	33%	33%	31%	-2%	-1.4%
Carpool/Vanpool	10%	9%	9%	-0.3%	1%
Transit	40%	40%	40%	0.5%	-0.4%
Walk	8%	8%	9%	0.8%	0.5%
Bicycle	3%	2%	3%	0.4%	0.8%
Work at Home	5%	5%	4%	-0.6%	-0.6%
Other	3%	4%	4%	1.1%	0.1%

Daily Transit Ridership

Route Nos.	Route Name	2012	2018	2012-2018	
				Number	Rate
38, 38L, 38AX, 38BX	Geary	55,042	56,587	1,545	2.8%
N, Nx	Judah	40,529	44,174	3,645	9%
14, 14L, 14X	Mission	44,162	51,910	7,748	17.5%
All Routes		693,881	698,892	5,011	0.7%

2018 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](#).

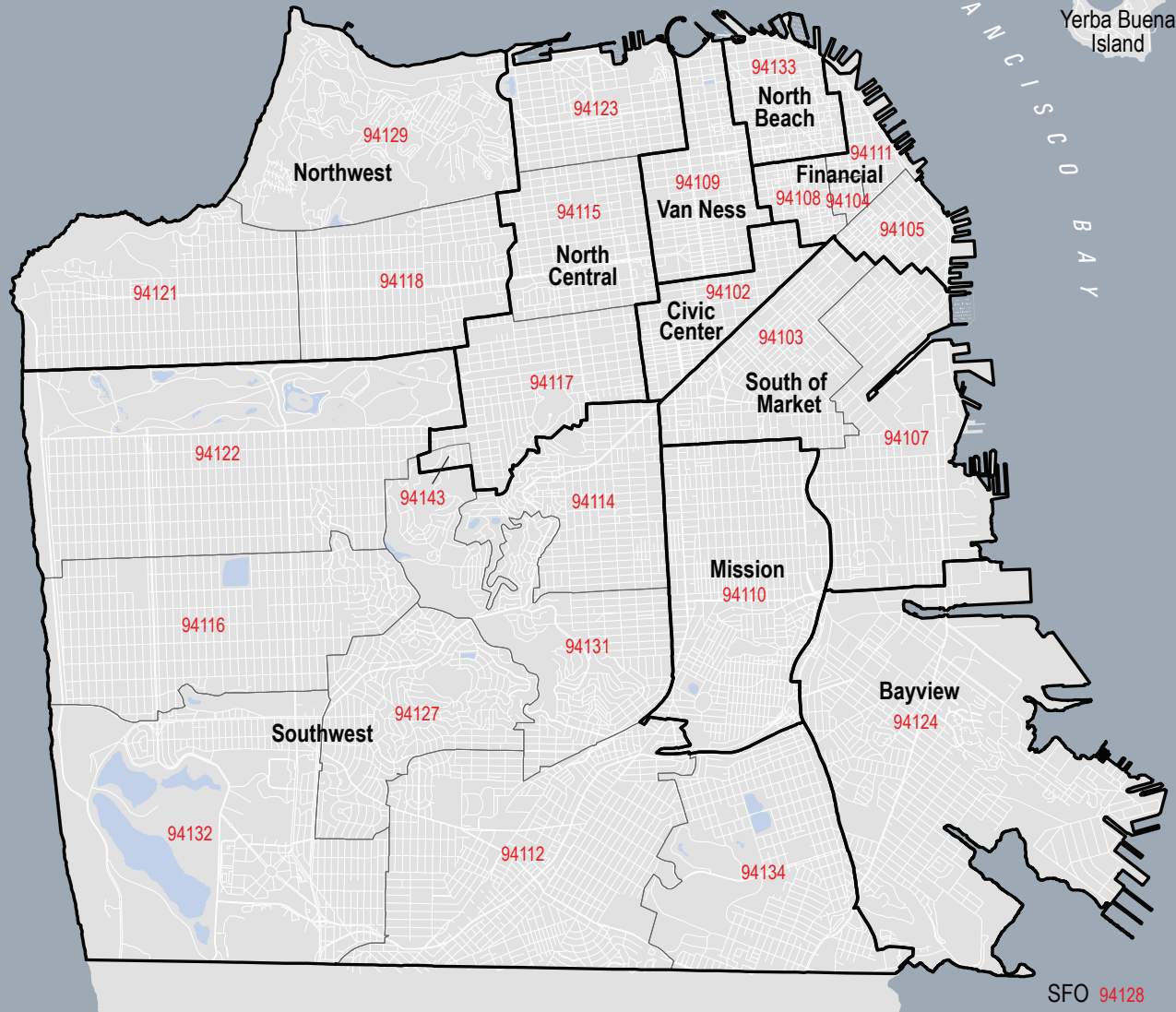
Commerce and Industry Districts are characterized by a concentration or specialization in one type of Land Use Activity or similar neighborhood commercial activities.

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

Note: S.N. = Sector Number

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

Table 1.2
CLASSIFICATION BY LAND USE CATEGORIES AND INDUSTRY GROUPS

<i>San Francisco Planning Department Land Use Category</i>		<i>North American Industry Classification System (NAICS)</i>	
	<i>Industry Group</i>	<i>NAICS Code</i>	
Office	Agriculture	111-115	
		211-213	
	Finance	522-523	
	Insurance	524-525	
	Real Estate	531, 533	
		516	
		518	
	Office Services	519	
		541	
		551	
		561	
	Public Administration	921-928	
Retail	General Merchandise	452	
	Food Stores	445	
	Apparel Stores	448	
	Eating & Drinking Places	722	
		441, 447	
		442	
	Other Retail Stores	443, 446, 451	
		453-454	
		532	
	Personal & Repair	811-812	
Production/Distribution/Repair (PDR)	Construction	236-238	
		488	
		485, 487	
		484, 492-493	
	Transportation and Warehousing	491	
		481, 483	
		486	
		221	
	Utilities	562	
		515	
	Information	517	
	Wholesale	423-425	
	Food Manufacturing	311-312	
	Apparel Manufacturing	313-315	
	Printing and Publishing	323, 511	
		321-322, 337	
		324-325	
	Other Manufacturing	316, 326-327	
		331-333	
		334-335	
	Repair Services	336	
	Transp. Equipment, Building Supplies	339, 444	
	Film & Sound Recording	512	
Hotel or Visitor	Accommodation	721	
Cultural/Institutional/Educational (CIE)	Art and Recreation	711	
	Performing arts, amusement parks	713	
	Education Services	611	
	Health Care	621-623	
	Social Assistance	624	
		712	
	Other CIE Services	813	
Private Households	Private Households (Pvt HH)	814	
	Unclassified Establishments	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, 2009–2018**

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)

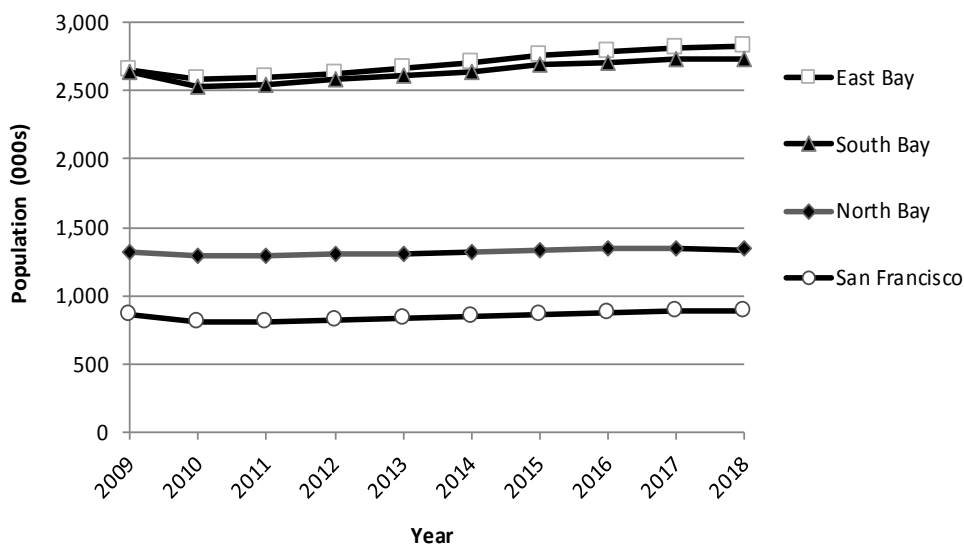
Sub-Region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	1,320.7	1,294.0	1,293.8	1,301.2	1,309.8	1,325.1	1,337.8	1,347.2	1,348.3	1,345.6
East Bay	2,647.9	2,577.2	2,597.3	2,623.4	2,660.3	2,697.4	2,751.3	2,784.9	2,809.6	2,825.2
South Bay	2,635.2	2,522.1	2,545.9	2,577.9	2,613.8	2,642.8	2,693.9	2,708.4	2,730.8	2,728.8
San Francisco	856.1	812.1	812.5	825.1	836.6	845.6	866.6	874.2	884.0	883.9
TOTAL	7,459.9	7,205.4	7,249.6	7,327.6	7,420.5	7,510.9	7,649.6	7,714.6	7,772.6	7,783.5

Annual Percentage Distribution

Sub-Region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	17.7	18.0	17.8	17.8	17.7	17.6	17.5	17.5	17.3	17.3
East Bay	35.5	35.8	35.8	35.8	35.9	35.9	36.0	36.1	36.1	36.3
South Bay	35.3	35.0	35.1	35.2	35.2	35.2	35.2	35.1	35.1	35.1
San Francisco	11.5	11.3	11.2	11.3	11.3	11.3	11.3	11.3	11.4	11.4
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	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
North Bay	-2.0	0.0	0.6	0.7	1.2	1.0	0.7	0.1	-0.2
East Bay	-2.7	0.8	1.0	1.4	1.4	2.0	1.2	0.9	0.6
South Bay	-4.3	0.9	1.3	1.4	1.1	1.9	0.5	0.8	-0.1
San Francisco	-5.1	0.1	1.5	1.4	1.1	2.5	0.9	1.1	0.0
TOTAL	-3.4	0.6	1.1	1.3	1.2	1.8	0.9	0.8	0.1

**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, 2009–2018**

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	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	679.9	668.1	684.6	692.0	698.5	676.3	682.8	682.9	687.3	687.6
East Bay	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	1,412.8
South Bay	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	1,503.7
San Francisco	459.8	453.8	462.5	447.6	487.2	532.4	548.0	559.8	568.8	575.6
TOTAL	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	4,179.7

Annual Percentage Distribution

Sub-Region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	18.5	18.4	18.5	18.4	18.2	16.9	16.8	16.6	16.5	16.5
East Bay	35.0	34.9	34.6	34.9	34.5	34.0	33.8	33.9	33.9	33.8
South Bay	34.0	34.2	34.4	34.7	34.6	35.7	35.9	35.9	35.9	36.0
San Francisco	12.5	12.5	12.5	11.9	12.7	13.3	13.5	13.6	13.7	13.8
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	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
North Bay	-1.7	2.5	1.1	0.9	-3.2	1.0	0.0	0.6	0.0
East Bay	-1.9	1.6	2.1	0.8	2.6	1.3	1.4	1.3	0.0
South Bay	-1.1	3.1	2.3	1.6	7.5	2.3	1.0	1.3	0.6
San Francisco	-1.3	1.9	-3.2	8.8	9.3	2.9	2.2	1.6	1.2
TOTAL	-1.5	2.3	1.3	2.1	4.1	1.8	1.1	1.2	0.4

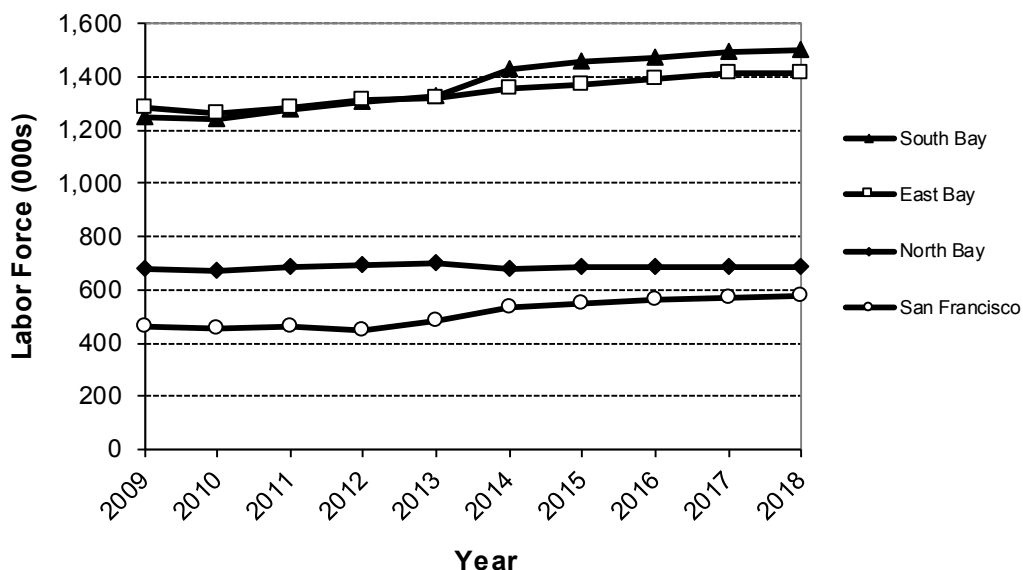


Table & Figure 2.1.3**BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 2009–2018**

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)

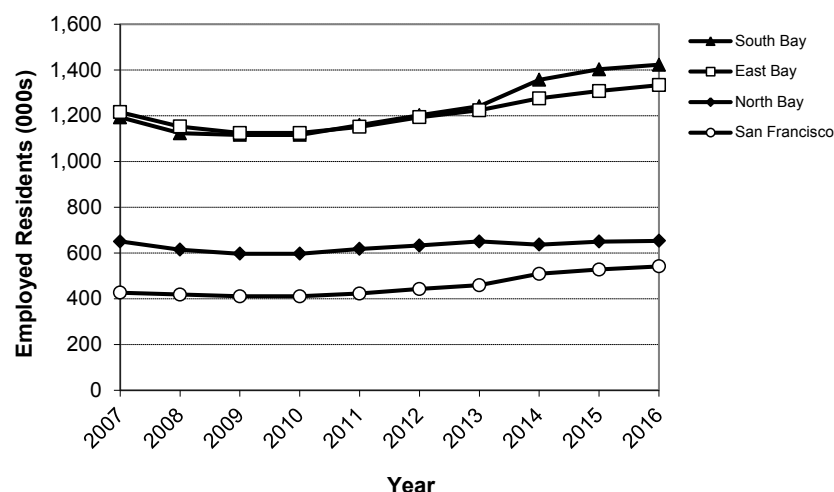
Sub-Region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	596.8	596.8	617.9	633.1	650.5	636.7	650.1	653.5	661.8	666.9
East Bay	1,124.4	1,124.4	1,151.6	1,193.5	1,224.1	1,275.7	1,308.1	1,334.2	1,360.1	1,369.6
South Bay	1,116.4	1,116.4	1,159.5	1,202.2	1,241.9	1,357.0	1,403.1	1,423.1	1,448.8	1,466.4
San Francisco	410.7	410.7	422.7	442.8	459.3	509.1	528.1	541.6	552.3	562.0
TOTAL	3,248.3	3,248.3	3,351.7	3,471.6	3,575.8	3,778.5	3,889.4	3,952.4	4,023.0	4,064.9

Annual Percentage Distribution

Sub-Region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	18.4	18.4	18.4	18.2	18.2	16.9	16.7	16.5	16.5	16.4
East Bay	34.6	34.6	34.4	34.4	34.2	33.8	33.6	33.8	33.8	33.7
South Bay	34.4	34.4	34.6	34.6	34.7	35.9	36.1	36.0	36.0	36.1
San Francisco	12.6	12.6	12.6	12.8	12.8	13.5	13.6	13.7	13.7	13.8
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	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
North Bay	0.0	3.5	2.5	2.7	-2.1	2.1	0.5	1.3	0.8
East Bay	0.0	2.4	3.6	2.6	4.2	2.5	2.0	1.9	0.7
South Bay	0.0	3.9	3.7	3.3	9.3	3.4	1.4	1.8	1.2
San Francisco	0.0	2.9	4.8	3.7	10.8	3.7	2.6	2.0	1.8
TOTAL	0.0	3.2	3.6	3.0	5.7	2.9	1.6	1.8	1.0

**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, 2009–2018**

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>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	65.3	69.8	66.6	59.0	47.9	39.6	32.7	29.4	25.4	21.0
East Bay	135.6	140.2	133.4	118.2	97.8	81.2	66.6	60.1	52.3	43.2
South Bay	128.4	122.2	117.0	103.1	85.0	69.9	57.3	52.0	45.5	37.3
San Francisco	41.5	43.2	39.8	34.9	27.9	23.3	19.9	18.2	16.5	13.5
TOTAL	370.8	375.4	356.8	315.2	258.6	214.0	176.5	159.7	139.7	115.0

Annual Percentage Distribution

<i>Sub-Region</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	17.6	18.6	18.7	18.7	18.5	18.5	18.5	18.4	18.2	18.3
East Bay	36.6	37.3	37.4	37.5	37.8	37.9	37.7	37.6	37.4	37.6
South Bay	34.6	32.6	32.8	32.7	32.9	32.7	32.5	32.6	32.6	32.4
San Francisco	11.2	11.5	11.2	11.1	10.8	10.9	11.3	11.4	11.8	11.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Sub-Region</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
North Bay	6.9	-4.6	-11.4	-18.8	-17.3	-17.4	-10.1	-13.6	-17.3
East Bay	3.4	-4.9	-11.4	-17.3	-17.0	-18.0	-9.8	-13.0	-17.4
South Bay	-4.8	-4.3	-11.9	-17.6	-17.8	-18.0	-9.2	-12.5	-18.0
San Francisco	4.1	-7.9	-12.3	-20.1	-16.5	-14.6	-8.5	-9.3	-18.2
TOTAL	1.2	-5.0	-11.7	-18.0	-17.2	-17.5	-9.5	-12.5	-17.7

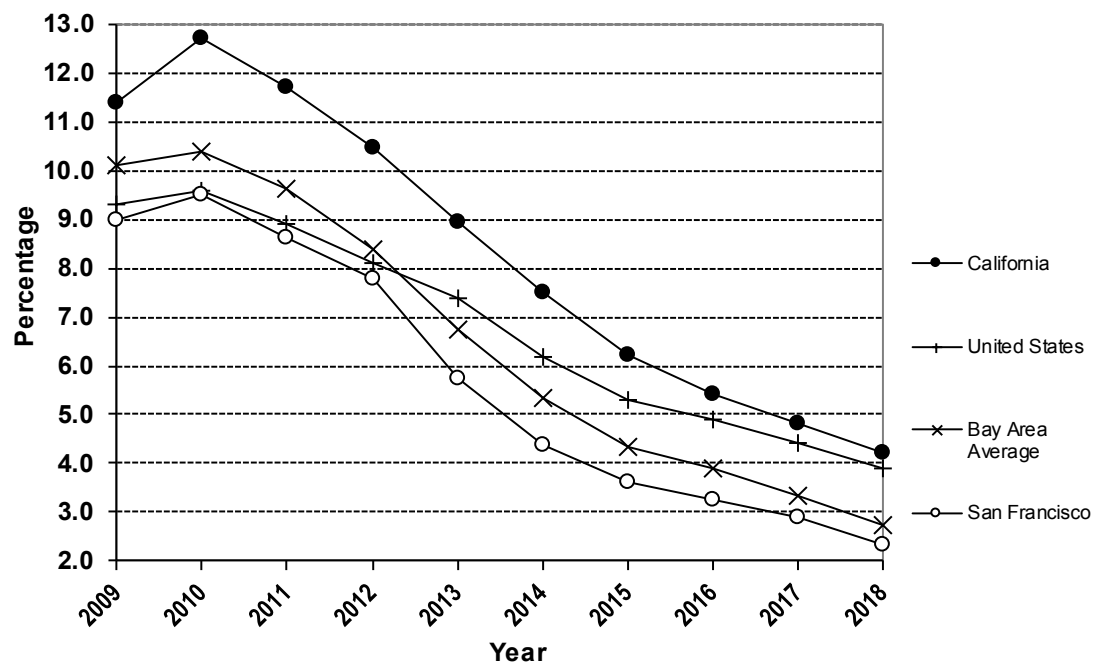
Average Annual Rate

<i>Sub-Region</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North Bay	9.6	10.4	9.7	8.5	6.9	5.9	4.8	4.3	3.7	3.1
East Bay	10.5	11.1	10.4	9.0	7.4	6.0	4.8	4.3	3.7	3.1
South Bay	10.3	9.9	9.2	7.9	6.4	4.9	3.9	3.5	3.0	2.5
San Francisco	9.0	9.5	8.6	7.8	5.7	4.4	3.6	3.3	2.9	2.3
Average	10.1	10.4	9.6	8.4	6.7	5.4	4.3	3.9	3.4	2.8

Average Annual Rate

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
California	11.4	12.7	11.7	10.5	8.9	7.5	6.2	5.4	4.8	4.2
United States	9.3	9.6	8.9	8.1	7.4	6.2	5.3	4.9	4.4	3.9

Figure 2.1.4
BAY AREA UNEMPLOYMENT RATE BY SUB-REGION, 2009–2018



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

Table 2.2.1 BAY AREA EMPLOYMENT BY INDUSTRY GROUP, 2009–2018

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

Number of Jobs (000s)

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Farm	20.1	19.0	18.7	18.9	20.0	20.2	20.1	20.5	20.3	20.1
Natural Resources, Mining & Construction	143.7	131.5	110.3	116.1	154.4	163.1	179.1	188.9	195.4	206.0
Manufacturing	313.9	305.4	310.5	312.1	310.9	320.9	327.6	334.9	346.4	357.4
Trade, Transportation & Utilities	518.6	509.2	513.3	527.8	547.5	562.1	575.9	588.1	593.4	585.4
Information	110.7	110.8	117.2	122.4	136.2	148.5	163.8	178.2	194.9	211.5
Financial Activities	179.3	170.4	170.4	175.0	173.9	177.2	179.9	193.5	194.3	194.6
Professional & Business Services	542.6	546.5	560.9	605.8	642.1	682.2	714.9	733.8	743.7	771.5
Educational & Health Services	394.5	409.7	415.0	425.2	520.7	540.2	551.1	567.5	587.9	599.5
Leisure & Hospitality	322.0	323.1	333.1	352.2	374.0	391.4	403.9	417.5	426.7	432.2
Other Services	107.2	108.8	110.3	112.9	117.0	121.5	123.4	126.0	128.7	130.0
Government	472.5	454.5	449.8	447.7	450.2	458.3	465.3	476.3	480.9	483.0
TOTAL	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	3,991.2

Annual Percentage Distribution

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Farm	0.6	0.6	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.5
Natural Resources, Mining & Construction	4.6	4.3	3.5	3.6	4.5	4.5	4.8	4.9	5.0	5.2
Manufacturing	10.0	9.9	10.0	9.7	9.0	8.9	8.8	8.8	8.9	9.0
Trade, Transportation & Utilities	16.6	16.5	16.5	16.4	15.9	15.7	15.5	15.4	15.2	14.7
Information	3.5	3.6	3.8	3.8	4.0	4.1	4.4	4.7	5.0	5.3
Financial Activities	5.7	5.5	5.5	5.4	5.0	4.9	4.9	5.1	5.0	4.9
Professional & Business Services	17.4	17.7	18.0	18.8	18.6	19.0	19.3	19.2	19.0	19.3
Educational & Health Services	12.6	13.3	13.3	13.2	15.1	15.1	14.9	14.8	15.0	15.0
Leisure & Hospitality	10.3	10.5	10.7	11.0	10.9	10.9	10.9	10.9	10.9	10.8
Other Services	3.4	3.5	3.5	3.5	3.4	3.4	3.3	3.3	3.3	3.3
Government	15.1	14.7	14.5	13.9	13.1	12.8	12.6	12.5	12.3	12.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Farm	-5.5	-1.6	1.1	5.8	1.0	-0.5	1.8	-0.8	-1.0
Natural Resources, Mining & Construction	-8.5	-16.1	5.3	33.0	5.6	9.8	5.5	3.4	5.4
Manufacturing	-2.7	1.7	0.5	-0.4	3.2	2.1	2.2	3.4	3.2
Trade, Transportation & Utilities	-1.8	0.8	2.8	3.7	2.7	2.5	2.1	0.9	-1.3
Information	0.1	5.8	4.4	11.3	9.0	10.3	8.8	9.3	8.5
Financial Activities	-5.0	0.0	2.7	-0.6	1.9	1.5	7.6	0.4	0.2
Professional & Business Services	0.7	2.6	8.0	6.0	6.2	4.8	2.6	1.3	3.7
Educational & Health Services	3.9	1.3	2.5	22.5	3.7	2.0	3.0	3.6	2.0
Leisure & Hospitality	0.3	3.1	5.7	6.2	4.7	3.2	3.4	2.2	1.3
Other Services	1.5	1.4	2.4	3.6	3.8	1.6	2.1	2.1	1.0
Government	-3.8	-1.0	-0.5	0.6	1.8	1.5	2.4	1.0	0.4
TOTAL	-1.2	0.7	3.4	7.2	4.0	3.3	3.2	2.3	2.0

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, 2009–2018 – 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>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
North Bay	467.3	459.2	453.8	461.9	497.0	514.2	522.9	532.5	541.5	549.6
East Bay	968.0	949.8	950.6	978.7	1,035.4	1,066.3	1,096.5	1,136.1	1,164.9	1,181.2
South Bay	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	1,519.1
San Francisco	524.3	521.7	526.5	557.9	608.6	639.5	669.0	703.6	718.9	741.3
Regional Total	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	3,991.2

Farm

North Bay	12.9	12.0	12.0	12.4	13.3	13.5	13.3	13.3	13.5	13.7
East Bay	1.5	1.5	1.5	1.4	1.5	1.4	1.2	1.3	1.4	1.3
South Bay	5.4	5.3	5.0	4.9	5.0	5.1	5.4	5.7	5.2	4.9
San Francisco	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.1	0.2	0.2
Regional Total	20.1	19.0	18.7	18.9	20.0	20.2	20.1	20.5	20.3	20.1

Natural Resources, Mining & Construction

North Bay	26.8	24.6	16.9	17.0	27.7	29.2	31.9	34.1	35.9	40.1
East Bay	54.7	48.7	48.5	50.6	57.3	59.5	63.3	68.4	71.5	75.6
South Bay	46.9	44.1	30.8	34.4	53.7	57.6	65.4	66.0	67.4	67.4
San Francisco	15.3	14.1	14.1	14.8	15.7	16.8	18.5	20.4	20.6	22.9
Regional Total	143.7	131.5	110.3	116.8	154.4	163.1	179.1	188.9	195.4	206.0

Manufacturing

North Bay	42.0	41.3	41.8	42.9	44.1	47.0	45.7	46.1	48.2	49.1
East Bay	82.5	78.6	79.1	80.3	78.6	81.9	86.7	89.9	95.6	100.3
South Bay	180.1	176.8	181.0	179.6	179.0	182.0	184.9	186.7	189.7	195.2
San Francisco	9.3	8.7	8.6	8.6	8.6	8.6	8.6	8.6	8.6	8.6
Regional Total	313.9	305.4	310.5	311.4	310.3	319.5	325.9	331.3	342.1	353.2

Trade, Transportation & Utilities

North Bay	82.3	82.2	83.4	85.4	87.8	90.6	92.0	92.7	92.9	93.6
East Bay	179.0	173.8	174.0	179.0	185.4	191.2	198.9	202.8	205.5	204.8
South Bay	193.7	191.2	193.5	198.4	204.9	208.7	210.1	213.7	212.2	203.0
San Francisco	63.6	62.0	62.4	65.0	69.4	71.6	74.9	78.8	82.8	84.0
Regional Total	518.6	509.2	513.3	527.8	547.5	562.1	575.9	588.1	593.4	585.4

Information

North Bay	7.0	6.6	6.8	7.1	7.2	7.0	6.9	6.8	6.9	6.8
East Bay	25.1	23.8	22.7	22.0	21.5	21.1	22.4	26.4	26.6	27.4
South Bay	59.1	61.2	66.8	69.6	82.2	92.5	102.8	106.1	119.9	130.7
San Francisco	19.5	19.2	20.9	23.7	25.3	27.9	31.7	39.0	41.5	46.6
Regional Total	110.7	110.8	117.2	122.4	136.2	148.5	163.8	178.2	194.9	211.5

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Financial Activities

<i>Sub-Region</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
North Bay	22.8	21.4	22.1	21.8	22.1	21.5	21.7	22.4	21.8	21.9
East Bay	52.6	48.4	47.2	48.4	49.5	49.3	49.6	57.3	57.7	54.9
South Bay	50.5	49.0	50.8	53.3	53.4	55.5	56.6	57.7	58.5	60.1
San Francisco	53.4	51.6	50.3	51.5	48.9	50.9	52.0	56.1	56.3	57.7
Regional Total	179.3	170.4	170.4	175.0	173.9	177.2	179.9	193.5	194.3	194.6

Professional & Business Services

North Bay	53.9	56.7	53.1	51.2	53.9	54.5	56.0	56.6	56.2	58.7
East Bay	148.5	148.1	154.3	165.0	172.3	179.9	182.9	180.8	184.9	189.5
South Bay	221.9	221.7	232.8	250.7	261.2	278.0	291.4	305.8	307.7	319.7
San Francisco	118.3	120.0	120.7	138.9	154.7	169.8	184.6	190.6	194.9	203.6
Regional Total	542.6	546.5	560.9	605.8	642.1	682.2	714.9	733.8	743.7	771.5

Educational & Health Services

North Bay	66.4	67.4	67.4	70.0	81.7	85.6	87.3	89.2	92.1	93.6
East Bay	130.0	139.7	137.5	141.1	170.9	175.1	178.4	184.9	192.1	194.9
South Bay	140.2	144.0	151.1	153.0	183.1	192.5	199.7	205.7	214.6	219.8
San Francisco	57.9	58.6	59.0	61.1	85.0	87.0	85.7	87.7	89.1	91.2
Regional Total	394.5	409.7	415.0	425.2	520.7	540.2	551.1	567.5	587.9	599.5

Leisure & Hospitality

North Bay	54.6	54.2	56.3	59.8	62.7	66.5	67.3	68.6	70.4	70.4
East Bay	85.2	85.6	87.3	92.0	98.0	103.1	106.3	111.4	114.9	116.6
South Bay	106.5	106.8	110.6	117.7	125.6	131.7	137.0	140.2	144.6	149.0
San Francisco	75.7	76.5	78.9	82.7	87.7	90.1	93.3	97.3	96.8	96.2
Regional Total	322.0	323.1	333.1	352.2	374.0	391.4	403.9	417.5	426.7	432.2

Other Services

North Bay	16.3	16.5	16.3	17.2	17.8	17.9	18.4	19.0	19.6	19.1
East Bay	34.3	34.5	36.0	36.1	37.0	37.7	38.1	39.2	40.1	40.8
South Bay	35.3	36.3	36.1	37.1	38.3	39.9	40.7	40.9	41.7	42.1
San Francisco	21.3	21.5	21.9	22.5	23.9	26.0	26.2	26.9	27.3	28.0
Regional Total	107.2	108.8	110.3	112.9	117.0	121.5	123.4	126.0	128.7	130.0

Government

North Bay	82.3	76.3	77.7	77.1	78.7	80.9	82.4	83.6	84.0	82.6
East Bay	174.6	167.1	162.5	162.8	163.4	166.1	168.7	173.8	174.6	175.1
South Bay	125.9	121.8	120.1	118.9	119.5	122.1	122.6	124.5	125.8	127.2
San Francisco	89.7	89.3	89.5	88.9	88.6	89.2	91.6	94.3	96.5	98.1
Regional Total	472.5	454.5	449.8	447.7	450.2	458.3	465.3	476.2	480.9	483.0

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, 2009–2018 – 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>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
North Bay	15.0	14.9	14.6	14.4	14.4	14.3	14.1	13.9	13.8	13.8
East Bay	31.0	30.7	30.6	30.4	30.0	29.7	29.6	29.7	29.8	29.6
South Bay	37.3	37.5	37.9	37.9	37.9	38.1	38.2	38.0	38.0	38.1
San Francisco	16.8	16.9	16.9	17.3	17.7	17.8	18.1	18.4	18.4	18.6
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	64.2	63.2	64.2	65.6	66.5	66.8	66.2	65.2	66.5	68.2
East Bay	7.5	7.9	8.0	7.4	7.5	6.9	6.0	6.4	6.9	6.5
South Bay	26.9	27.9	26.7	25.9	25.0	25.2	26.9	27.9	25.6	24.4
San Francisco	1.5	1.1	1.1	1.1	1.0	1.0	1.0	0.6	1.0	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	18.6	18.7	15.3	14.6	17.9	17.9	17.8	18.1	18.4	19.5
East Bay	38.1	37.0	44.0	43.3	37.1	36.5	35.3	36.2	36.6	36.7
South Bay	32.6	33.5	27.9	29.5	34.8	35.3	36.5	34.9	34.5	32.7
San Francisco ¹	10.6	10.7	12.8	12.7	10.2	10.3	10.3	10.8	10.5	11.1
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	13.4	13.5	13.5	13.8	14.2	14.7	14.0	13.9	14.1	13.9
East Bay	26.3	25.7	25.5	25.8	25.3	25.6	26.6	27.1	27.9	28.4
South Bay	57.4	57.9	58.3	57.7	57.7	57.0	56.7	56.4	55.5	55.3
San Francisco	3.0	2.8	2.8	2.8	2.8	2.7	2.6	2.6	2.5	2.4
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	16.1	16.2	16.2	16.0	16.1	16.0	15.8	15.7	16.0
East Bay	34.5	34.1	33.9	33.9	33.9	34.0	34.5	34.5	34.6	35.0
South Bay	37.4	37.5	37.7	37.6	37.4	37.1	36.5	36.3	35.8	34.7
San Francisco	12.3	12.2	12.2	12.3	12.7	12.7	13.0	13.4	14.0	14.3
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	6.3	6.0	5.8	5.8	5.3	4.7	4.2	3.8	3.5	3.2
East Bay	22.7	21.5	19.4	18.0	15.8	14.2	13.7	14.8	13.6	13.0
South Bay	53.4	55.2	57.0	56.9	60.4	62.3	62.8	59.5	61.5	61.8
San Francisco	17.6	17.3	17.8	19.4	18.6	18.8	19.4	21.9	21.3	22.0
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>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
North Bay	12.7	12.6	13.0	12.5	12.7	12.1	12.1	11.6	11.2	11.3
East Bay	29.3	28.4	27.7	27.7	28.5	27.8	27.6	29.6	29.7	28.2
South Bay	28.2	28.8	29.8	30.5	30.7	31.3	31.5	29.8	30.1	30.9
San Francisco	29.8	30.3	29.5	29.4	28.1	28.7	28.9	29.0	29.0	29.7
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	9.9	10.4	9.5	8.5	8.4	8.0	7.8	7.7	7.6	7.6
East Bay	27.4	27.1	27.5	27.2	26.8	26.4	25.6	24.6	24.9	24.6
South Bay	40.9	40.6	41.5	41.4	40.7	40.8	40.8	41.7	41.4	41.4
San Francisco	21.8	22.0	21.5	22.9	24.1	24.9	25.8	26.0	26.2	26.4
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	16.8	16.5	16.2	16.5	15.7	15.8	15.8	15.7	15.7	15.6
East Bay	33.0	34.1	33.1	33.2	32.8	32.4	32.4	32.6	32.7	32.5
South Bay	35.5	35.1	36.4	36.0	35.2	35.6	36.2	36.2	36.5	36.7
San Francisco	14.7	14.3	14.2	14.4	16.3	16.1	15.6	15.5	15.2	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	16.8	16.9	17.0	16.8	17.0	16.7	16.4	16.5	16.3
East Bay	26.5	26.5	26.2	26.1	26.2	26.3	26.3	26.7	26.9	27.0
South Bay	33.1	33.1	33.2	33.4	33.6	33.6	33.9	33.6	33.9	34.5
San Francisco	23.5	23.7	23.7	23.5	23.4	23.0	23.1	23.3	22.7	22.3
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	15.2	15.2	14.8	15.2	15.2	14.7	14.9	15.1	15.2	14.7
East Bay	32.0	31.7	32.6	32.0	31.6	31.0	30.9	31.1	31.2	31.4
South Bay	32.9	33.4	32.7	32.9	32.7	32.8	33.0	32.5	32.4	32.4
San Francisco	19.9	19.8	19.9	19.9	20.4	21.4	21.2	21.3	21.2	21.5
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	17.4	16.8	17.3	17.2	17.5	17.7	17.7	17.6	17.5	17.1
East Bay	37.0	36.8	36.1	36.4	36.3	36.2	36.3	36.5	36.3	36.3
South Bay	26.6	26.8	26.7	26.6	26.5	26.6	26.3	26.1	26.2	26.3
San Francisco	19.0	19.6	19.9	19.9	19.7	19.5	19.7	19.8	20.1	20.3
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, 2009–2018 – 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>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>	<i>2017-18</i>
North Bay	-1.7	-1.2	1.8	7.6	3.5	1.7	1.8	1.7	1.5
East Bay	-1.9	0.1	3.0	5.8	3.0	2.8	3.6	2.5	1.4
South Bay	-0.6	1.8	3.3	7.3	4.6	3.7	2.6	2.4	2.1
San Francisco	-0.5	0.9	6.0	9.1	5.1	4.6	5.2	2.2	3.1
Regional Total	-1.2	0.7	3.4	7.2	4.0	3.3	3.2	2.3	2.0

Farm

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

Natural Resources, Mining & Construction

North Bay	-8.2	-31.3	0.6	62.9	5.4	9.2	7.0	5.2	11.7
East Bay	-11.0	-0.4	4.3	13.2	3.8	6.4	8.0	4.5	5.7
South Bay	-6.0	-30.2	11.7	56.1	7.3	13.5	0.9	2.1	0.0
San Francisco	-7.8	0.0	5.0	6.1	7.0	10.1	10.4	0.9	11.2
Regional Total	-8.5	-16.1	5.9	32.2	5.6	9.8	5.5	3.4	5.4

Manufacturing

North Bay	-1.7	1.2	2.6	2.8	6.6	-2.8	0.9	4.6	1.9
East Bay	-4.7	0.6	1.5	-2.1	4.2	5.9	3.7	6.4	4.9
South Bay	-1.8	2.4	-0.8	-0.3	1.7	1.6	1.0	1.6	2.9
San Francisco ¹	-6.5	-1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Regional Total	-2.7	1.7	0.3	-0.4	3.0	2.0	1.7	3.3	3.2

Trade, Transportation & Utilities

North Bay	-0.1	1.5	2.4	2.8	3.2	1.5	0.8	0.2	0.8
East Bay	-2.9	0.1	2.9	3.6	3.1	4.0	1.9	1.4	-0.3
South Bay	-1.3	1.2	2.5	3.3	1.9	0.7	1.7	-0.7	-4.3
San Francisco	-2.5	0.6	4.2	6.8	3.2	4.6	5.3	5.0	1.4
Regional Total	-1.8	0.8	2.8	3.7	2.7	2.5	2.1	0.9	-1.3

Information

North Bay	-5.7	3.0	4.4	1.4	-2.8	-1.4	-1.9	2.0	-1.4
East Bay	-5.2	-4.6	-3.1	-2.3	-1.9	6.2	17.6	0.9	3.0
South Bay	3.6	9.2	4.2	18.1	12.5	11.1	3.2	13.0	9.0
San Francisco	-1.5	8.9	13.4	6.8	10.3	13.6	23.1	6.4	12.3
Regional Total	0.1	5.8	4.4	11.3	9.0	10.3	8.8	9.3	8.5

CONTINUED >

Financial Activities

<i>Sub-Region</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>	<i>2017-18</i>
North Bay	-6.1	3.3	-1.4	1.4	-2.7	0.9	3.1	-2.6	0.5
East Bay	-8.0	-2.5	2.5	2.3	-0.4	0.6	15.5	0.7	-4.9
South Bay	-3.0	3.7	4.9	0.2	3.9	2.0	2.0	1.3	2.7
San Francisco	-3.4	-2.5	2.4	-5.0	4.1	2.2	8.0	0.3	2.5
Regional Total	-5.0	0.0	2.7	-0.6	1.9	1.5	7.6	0.4	0.2

Professional & Business Services

North Bay	5.2	-6.3	-3.6	5.3	1.1	2.8	1.0	-0.7	4.4
East Bay	-0.3	4.2	6.9	4.4	4.4	1.7	-1.1	2.2	2.5
South Bay	-0.1	5.0	7.7	4.2	6.4	4.8	4.9	0.6	3.9
San Francisco	1.4	0.6	15.1	11.4	9.8	8.7	3.2	2.3	4.5
Regional Total	0.7	2.6	8.0	6.0	6.2	4.8	2.6	1.3	3.7

Educational & Health Services

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

Leisure & Hospitality

North Bay	-0.7	3.9	6.2	4.8	6.1	1.2	1.9	2.6	0.0
East Bay	0.5	2.0	5.4	6.5	5.2	3.1	4.8	3.1	1.5
South Bay	0.3	3.6	6.4	6.7	4.9	4.0	2.3	3.1	3.0
San Francisco	1.1	3.1	4.8	6.0	2.7	3.6	4.3	-0.5	-0.6
Regional Total	0.3	3.1	5.7	6.2	4.7	3.2	3.4	2.2	1.3

Other Services

North Bay	1.2	-1.2	5.5	3.5	0.6	2.8	3.3	3.2	-2.6
East Bay	0.6	4.3	0.3	2.5	1.9	1.1	2.9	2.3	1.7
South Bay	2.8	-0.6	2.8	3.2	4.2	2.0	0.5	2.0	1.0
San Francisco	0.9	1.9	2.7	6.2	8.8	0.8	2.7	1.5	2.6
Regional Total	1.5	1.4	2.4	3.6	3.8	1.6	2.1	2.1	1.0

Government

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

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



Photo by Michael Li, SF Planning

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 2009 to 2018. *Tables 3.2.1* through *3.2.4* show employment data by Industry Group within each Land Use Category in San Francisco from 2009 to 2018. *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 2018. 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, 2009–2018

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	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	211,885	211,050	218,837	231,908	244,262	260,976	279,911	293,320	298,644	316,255
Retail	98,278	98,139	100,598	106,305	111,754	117,654	122,860	125,333	126,110	125,645
PDR	76,727	72,967	72,466	75,637	78,234	81,519	85,589	94,138	98,853	104,591
Hotel	17,828	17,568	17,795	17,400	18,136	16,646	17,282	16,520	16,142	16,300
CIE	124,831	126,208	129,015	132,851	156,157	157,988	161,801	167,069	168,810	173,419
Pvt HH	19,443	19,819	20,327	22,156	4,113	5,597	7,015	6,853	6,138	4,564
TOTAL	548,992	545,751	559,038	586,257	612,656	640,380	674,458	703,233	714,697	740,774

Annual Percentage Distribution

Land Use Category	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	38.6	38.7	39.1	39.6	39.9	40.8	41.5	41.7	41.8	42.7
Retail	17.9	18.0	18.0	18.1	18.2	18.4	18.2	17.8	17.6	17.0
PDR	14.0	13.4	13.0	12.9	12.8	12.7	12.7	13.4	13.8	14.1
Hotel	3.2	3.2	3.2	3.0	3.0	2.6	2.6	2.3	2.3	2.2
CIE	22.7	23.1	23.1	22.7	25.5	24.7	24.0	23.8	23.6	23.4
Pvt HH	3.5	3.6	3.6	3.8	0.7	0.9	1.0	1.0	0.9	0.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	-0.4	3.7	6.0	5.3	6.8	7.3	4.8	1.8	5.9
Retail	-0.1	2.5	5.7	5.1	5.3	4.4	2.0	0.6	-0.4
PDR	-4.9	-0.7	4.4	3.4	4.2	5.0	10.0	5.0	5.8
Hotel	-1.5	1.3	-2.2	4.2	-8.2	3.8	-4.4	-2.3	1.0
CIE	1.1	2.2	3.0	17.5	1.2	2.4	3.3	1.0	2.7
Pvt HH	1.9	2.6	9.0	-81.4	36.1	25.3	-2.3	-10.4	-25.6
TOTAL	-0.6	2.4	4.9	4.5	4.5	5.3	4.3	1.6	3.6

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, 2018

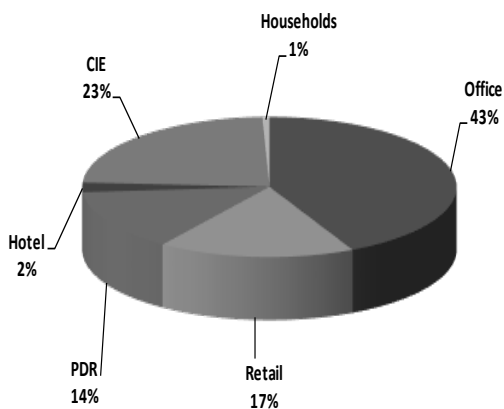


Figure 3.1.2
SAN FRANCISCO EMPLOYMENT BY LAND
USE CATEGORY, 2009–2018

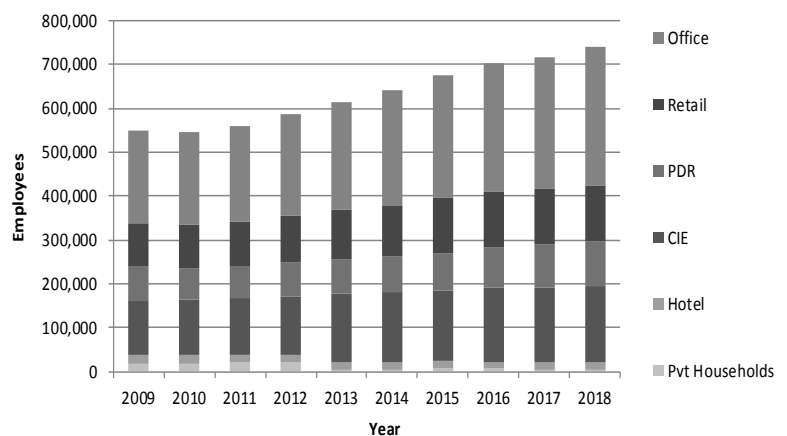


Table & Figure 3.2.1**OFFICE EMPLOYMENT BY INDUSTRY GROUP, 2009–2018**

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

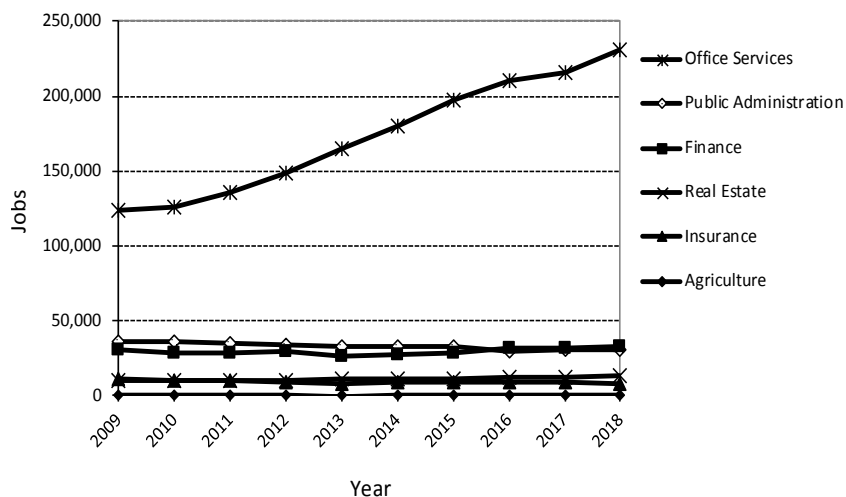
Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Agriculture	330	357	272	184	159	172	166	163	198	204
Finance	30,313	28,742	28,316	29,048	26,736	27,621	28,040	31,777	31,769	33,028
Insurance	10,799	9,796	9,729	9,512	8,306	8,734	9,296	8,966	8,527	8,297
Real Estate	10,146	10,206	10,126	10,554	11,292	11,507	11,695	12,053	12,588	13,164
Office Services	123,917	125,641	135,363	148,682	164,602	180,174	197,553	210,389	215,301	230,391
Public Administration	36,380	36,308	35,032	33,928	33,166	32,768	33,161	29,972	30,261	31,171
TOTAL	211,885	211,050	218,838	231,908	244,261	260,976	279,911	293,320	298,644	316,255

Annual Percentage Distribution

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Agriculture	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Finance	14.3	13.6	12.9	12.5	10.9	10.6	10.0	10.8	10.6	10.4
Insurance	5.1	4.6	4.4	4.1	3.4	3.3	3.3	3.1	2.9	2.6
Real Estate	4.8	4.8	4.6	4.6	4.6	4.4	4.2	4.1	4.2	4.2
Office Services	58.5	59.5	61.9	64.1	67.4	69.0	70.6	71.7	72.1	72.8
Public Administration	17.2	17.2	16.0	14.6	13.6	12.6	11.8	10.2	10.1	9.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Agriculture	8.2	-23.8	-32.4	-13.6	8.2	-3.5	-1.8	21.5	3.0
Finance	-5.2	-1.5	2.6	-8.0	3.3	1.5	13.3	0.0	4.0
Insurance	-9.3	-0.7	-2.2	-12.7	5.2	6.4	-3.5	-4.9	-2.7
Real Estate	0.6	-0.8	4.2	7.0	1.9	1.6	3.1	4.4	4.6
Office Services	1.4	7.7	9.8	10.7	9.5	9.6	6.5	2.3	7.0
Public Administration	-0.2	-3.5	-3.2	-2.2	-1.2	1.2	-9.6	1.0	3.0
TOTAL	-0.4	3.7	6.0	5.3	6.8	7.3	4.8	1.8	5.9

**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, 2009–2018

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

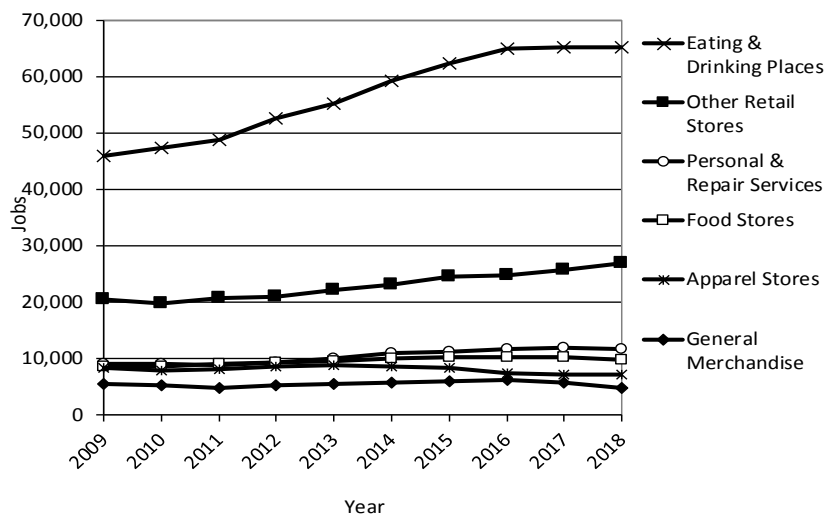
Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
General Merchandise	5,598	5,219	4,846	5,302	5,457	5,696	6,017	6,201	5,723	4,909
Food Stores	8,575	8,727	9,213	9,349	9,695	9,959	10,223	10,239	10,248	9,886
Apparel Stores	8,434	7,815	8,184	8,687	8,957	8,743	8,447	7,558	7,194	7,115
Eating & Drinking Places	46,049	47,483	48,893	52,600	55,312	59,203	62,340	64,942	65,295	65,216
Other Retail Stores	20,486	19,886	20,678	21,070	22,291	23,147	24,601	24,722	25,714	26,854
Personal & Repair Services	9,136	9,009	8,784	9,298	10,041	10,906	11,232	11,671	11,936	11,665
TOTAL	98,278	98,139	100,598	106,306	111,753	117,654	122,860	125,333	126,110	125,645

Annual Percentage Distribution

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
General Merchandise	5.7	5.3	4.8	5.0	4.9	4.8	4.9	4.9	4.5	3.9
Food Stores	8.7	8.9	9.2	8.8	8.7	8.5	8.3	8.2	8.1	7.9
Apparel Stores	8.6	8.0	8.1	8.2	8.0	7.4	6.9	6.0	5.7	5.7
Eating & Drinking Places	46.9	48.4	48.6	49.5	49.5	50.3	50.7	51.8	51.8	51.9
Other Retail Stores	20.8	20.3	20.6	19.8	19.9	19.7	20.0	19.7	20.4	21.4
Personal & Repair Services	9.3	9.2	8.7	8.7	9.0	9.3	9.1	9.3	9.5	9.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
General Merchandise	-6.8	-7.1	9.4	2.9	4.4	5.6	3.1	-7.7	-14.2
Food Stores	1.8	5.6	1.5	3.7	2.7	2.7	0.2	0.1	-3.5
Apparel Stores	-7.3	4.7	6.1	3.1	-2.4	-3.4	-10.5	-4.8	-1.1
Eating & Drinking Places	3.1	3.0	7.6	5.2	7.0	5.3	4.2	0.5	-0.1
Other Retail Stores	-2.9	4.0	1.9	5.8	3.8	6.3	0.5	4.0	4.4
Personal & Repair Services	-1.4	-2.5	5.9	8.0	8.6	3.0	3.9	2.3	-2.3
TOTAL	-0.1	2.5	5.7	5.1	5.3	4.4	2.0	0.6	-0.4



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, 2009–2018**

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

Annual Average Number of Jobs

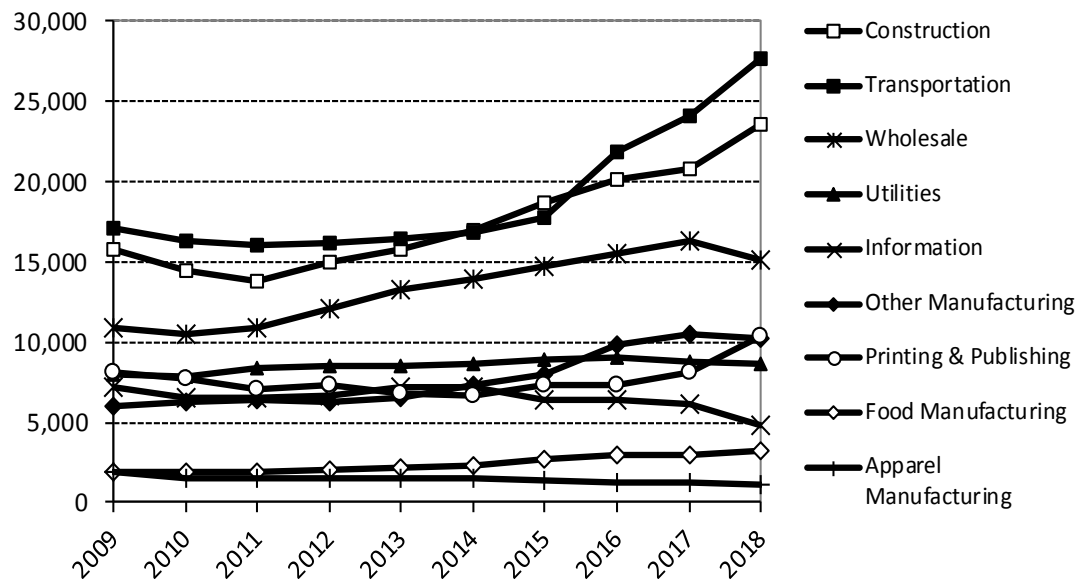
Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Construction	15,813	14,474	13,860	15,011	15,759	17,000	18,669	20,119	20,860	23,584
Transportation	17,044	16,305	16,052	16,135	16,431	16,837	17,726	21,825	24,055	27,639
Utilities	7,936	7,874	8,364	8,479	8,466	8,614	8,854	9,010	8,807	8,681
Information	7,165	6,565	6,531	6,724	7,176	7,221	6,400	6,371	6,096	4,816
Wholesale	10,943	10,499	10,830	12,015	13,317	13,908	14,706	15,453	16,283	15,066
Food Manufacturing	1,920	1,865	1,867	2,063	2,199	2,286	2,658	3,000	2,987	3,227
Apparel Manufacturing	1,847	1,487	1,513	1,536	1,512	1,559	1,334	1,232	1,184	1,073
Printing & Publishing	8,096	7,687	7,114	7,351	6,849	6,722	7,272	7,261	8,144	10,300
Other Manufacturing	5,963	6,211	6,335	6,323	6,525	7,372	7,971	9,867	10,435	10,205
TOTAL	76,727	72,967	72,466	75,637	78,234	81,519	85,590	94,138	98,851	104,591

Annual Percentage Distribution

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Construction	20.6	19.8	19.1	19.8	20.1	20.9	21.8	21.4	21.1	22.5
Transportation	22.2	22.3	22.2	21.3	21.0	20.7	20.7	23.2	24.3	26.4
Utilities	10.3	10.8	11.5	11.2	10.8	10.6	10.3	9.6	8.9	8.3
Information	9.3	9.0	9.0	8.9	9.2	8.9	7.5	6.8	6.2	4.6
Wholesale	14.3	14.4	14.9	15.9	17.0	17.1	17.2	16.4	16.5	14.4
Food Manufacturing	2.5	2.6	2.6	2.7	2.8	2.8	3.1	3.2	3.0	3.1
Apparel Manufacturing	2.4	2.0	2.1	2.0	1.9	1.9	1.6	1.3	1.2	1.0
Printing & Publishing	10.6	10.5	9.8	9.7	8.8	8.2	8.5	7.7	8.2	9.8
Other Manufacturing	7.8	8.5	8.7	8.4	8.3	9.0	9.3	10.5	10.6	9.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Construction	-8.5	-4.2	8.3	5.0	7.9	9.8	7.8	3.7	13.1
Transportation	-4.3	-1.6	0.5	1.8	2.5	5.3	23.1	10.2	14.9
Utilities	-0.8	6.2	1.4	-0.2	1.7	2.8	1.8	-2.3	-1.4
Information	-8.4	-0.5	3.0	6.7	0.6	-11.4	-0.5	-4.3	-21.0
Wholesale	-4.1	3.2	10.9	10.8	4.4	5.7	5.1	5.4	-7.5
Food Manufacturing	-2.9	0.1	10.5	6.6	4.0	16.3	12.9	-0.4	8.0
Apparel Manufacturing	-19.5	1.7	1.5	-1.6	3.1	-14.4	-7.6	-3.9	-9.4
Printing & Publishing	-5.1	-7.5	3.3	-6.8	-1.9	8.2	-0.2	12.2	26.5
Other Manufacturing	4.2	2.0	-0.2	3.2	13.0	8.1	23.8	5.8	-2.2
TOTAL	-4.9	-0.7	4.4	3.4	4.2	5.0	10.0	5.0	5.8

Figure 3.2.3**PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2009–2018****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, 2009–2018**

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

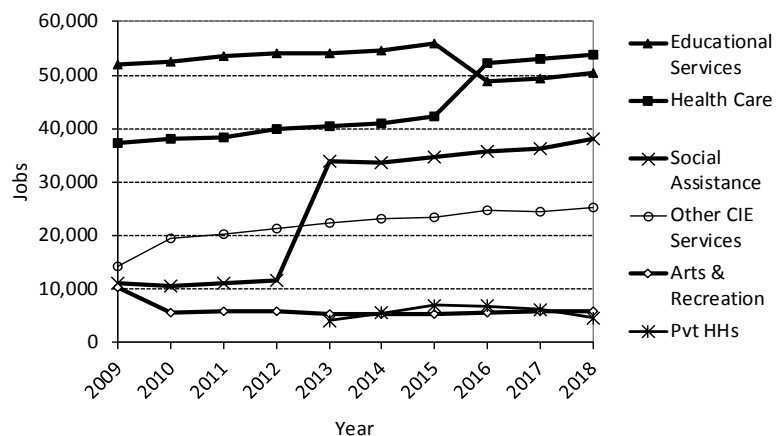
Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Art & Recreation	10,420	5,491	5,863	5,995	5,388	5,430	5,375	5,722	5,812	5,841
Health Care	37,211	37,999	38,279	39,896	40,575	40,988	42,228	52,177	53,037	53,683
Educational Services	52,022	52,595	53,470	53,996	54,048	54,602	55,951	48,746	49,327	50,515
Social Assistance	10,977	10,690	11,000	11,642	33,860	33,734	34,700	35,622	36,221	38,023
Other CIE Services	14,201	19,433	20,403	21,324	22,286	23,233	23,547	24,801	24,412	25,357
Pvt HH	19,443	19,819	20,327	22,156	4,113	5,597	7,015	6,853	6,138	4,564
TOTAL	144,274	146,027	149,342	155,009	160,270	163,584	168,816	173,921	174,947	177,983

Annual Percentage Distribution

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Art & Recreation	7.2	3.8	3.9	3.9	3.4	3.3	3.2	3.3	3.3	3.3
Health Care	25.8	26.0	25.6	25.7	25.3	25.1	25.0	30.0	30.3	30.2
Educational Services	36.1	36.0	35.8	34.8	33.7	33.4	33.1	28.0	28.2	28.4
Social Assistance	7.6	7.3	7.4	7.5	21.1	20.6	20.6	20.5	20.7	21.4
Other CIE Services	9.8	13.3	13.7	13.8	13.9	14.2	13.9	14.3	14.0	14.2
Pvt HH	13.5	13.6	13.1	14.3	2.6	3.4	4.2	3.9	3.5	2.6
TOTAL	100.0	100.0	99.5	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Art & Recreation	-47.3	6.8	2.3	-10.1	0.8	-1.0	6.5	1.6	0.5
Health Care	2.1	0.7	4.2	1.7	1.0	3.0	23.6	1.6	1.2
Educational Services	1.1	1.7	1.0	0.1	1.0	2.5	-12.9	1.2	2.4
Social Assistance	-2.6	2.9	5.8	190.8	-0.4	2.9	2.7	1.7	5.0
Other CIE Services	36.8	5.0	4.5	4.5	4.2	1.4	5.3	-1.6	3.9
Pvt HH	-	2.6	9.0	-81.4	36.1	25.3	-2.3	-10.4	-25.6
TOTAL	1.2	2.3	3.8	3.4	2.1	3.2	3.0	0.6	1.7

**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, 2018**

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&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	2,620	3,454	12,735	9	3,442	61	22,321
Civic Center	14,746	10,056	2,192	4,506	11,986	116	43,602
Financial	165,459	20,238	32,715	5,170	17,135	582	241,299
Mission	5,290	7,778	3,574	36	7,344	255	24,277
North Beach	4,523	8,190	1,523	1,004	5,094	127	20,461
North Central	5,584	12,586	1,617	584	30,218	754	51,343
Northwest	5,177	7,052	2,578	93	14,686	536	30,122
South of Market	82,600	27,916	36,092	3,608	43,897	336	194,449
Southwest	8,510	16,462	4,875	145	28,467	986	59,445
Van Ness	4,375	7,091	947	1,043	7,854	238	21,548
Treasure Island	40	8	126	0	444	4	622
Unclassified	17,331	4,814	5,617	102	2,852	569	31,285
TOTAL	316,255	125,645	104,591	16,300	173,419	4,564	740,774

Percentage Distribution by Commerce and Industry District

<i>C&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	0.8	2.7	12.2	0.1	2.0	1.3	3.0
Civic Center	4.7	8.0	2.1	27.6	6.9	2.5	5.9
Financial	52.3	16.1	31.3	31.7	9.9	12.8	32.6
Mission	1.7	6.2	3.4	0.2	4.2	5.6	3.3
North Beach	1.4	6.5	1.5	6.2	2.9	2.8	2.8
North Central	1.8	10.0	1.5	3.6	17.4	16.5	6.9
Northwest	1.6	5.6	2.5	0.6	8.5	11.7	4.1
South of Market	26.1	22.2	34.5	22.1	25.3	7.4	26.2
Southwest	2.7	13.1	4.7	0.9	16.4	21.6	8.0
Van Ness	1.4	5.6	0.9	6.4	4.5	5.2	2.9
Treasure Island	0.0	0.0	0.1	0.0	0.3	0.1	0.1
Unclassified	5.5	3.8	5.4	0.6	1.6	12.5	4.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

<i>C&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	11.7	15.5	57.1	0.0	15.4	0.3	100.0
Civic Center	33.8	23.1	5.0	10.3	27.5	0.3	100.0
Financial	68.6	8.4	13.6	2.1	7.1	0.2	100.0
Mission	21.8	32.0	14.7	0.1	30.3	1.1	100.0
North Beach	22.1	40.0	7.4	4.9	24.9	0.6	100.0
North Central	10.9	24.5	3.1	1.1	58.9	1.5	100.0
Northwest	17.2	23.4	8.6	0.3	48.8	1.8	100.0
South of Market	42.5	14.4	18.6	1.9	22.6	0.2	100.0
Southwest	14.3	27.7	8.2	0.2	47.9	1.7	100.0
Van Ness	20.3	32.9	4.4	4.8	36.4	1.1	100.0
Treasure Island	6.4	1.3	20.3	0.0	71.4	0.6	100.0
Unclassified	55.4	15.4	18.0	0.3	9.1	1.8	100.0
TOTAL	42.7	17.0	14.1	2.2	23.4	0.6	100.0

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



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 2009 to 2018. *Tables 4.2.1* through *4.2.4* show establishment data by Industry Group within each Land Use Category in San Francisco from 2009 to 2018. *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, 2009–2018**

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

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	11,419	11,430	11,511	11,938	12,542	13,366	13,595	13,578	13,989	15,314
Retail	7,496	7,541	7,516	7,666	7,947	8,189	8,332	8,403	8,464	8,695
PDR	4,718	4,614	4,483	4,500	4,596	4,700	4,717	4,799	4,878	5,312
Hotel	292	299	290	297	305	311	312	304	306	318
CIE	4,739	4,794	4,844	4,930	25,597	26,246	26,469	26,564	26,792	27,466
Pvt HH	22,864	24,161	26,607	26,140	4,184	4,240	5,034	5,654	5,132	3,913
TOTAL	51,528	52,839	55,251	55,471	55,171	57,052	58,459	59,302	59,561	61,018

Annual Percentage Distribution

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	22.2	21.6	20.8	21.5	22.7	23.4	23.3	22.9	23.5	25.1
Retail	14.5	14.3	13.6	13.8	14.4	14.4	14.3	14.2	14.2	14.2
PDR	9.2	8.7	8.1	8.1	8.3	8.2	8.1	8.1	8.2	8.7
Hotel	0.6	0.6	0.5	0.5	0.6	0.5	0.5	0.5	0.5	0.5
CIE	9.2	9.1	8.8	8.9	46.4	46.0	45.3	44.8	45.0	45.0
Pvt HH	55.6	45.7	48.2	47.1	7.6	7.4	8.6	9.5	8.6	6.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	0.1	0.7	3.7	5.1	6.6	1.7	-0.1	3.0	9.5
Retail	0.6	-0.3	2.0	3.7	3.0	1.7	0.9	0.7	2.7
PDR	-2.2	-2.8	0.4	2.1	2.3	0.4	1.7	1.6	8.9
Hotel	2.4	-3.0	2.4	2.7	2.0	0.3	-2.6	0.7	3.9
CIE	1.2	1.0	1.8	419.2	2.5	0.8	0.4	0.9	2.5
Pvt HH	0.0	10.1	-1.8	-84.0	1.3	18.7	12.3	-9.2	-23.8
TOTAL	2.5	4.6	0.4	-0.5	3.4	2.5	1.4	0.4	2.4

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- 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 4.1.1a
SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2017

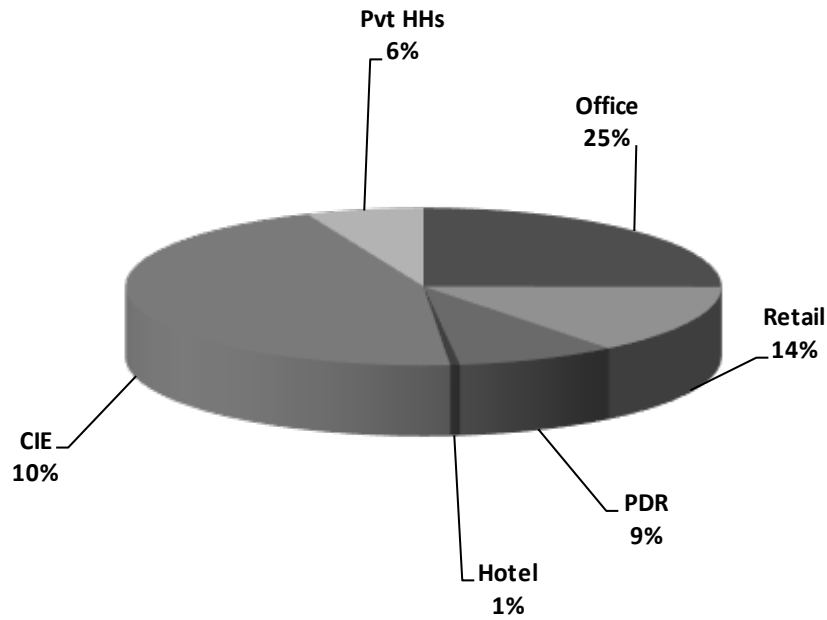


Figure 4.1.1b
SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2009–2018

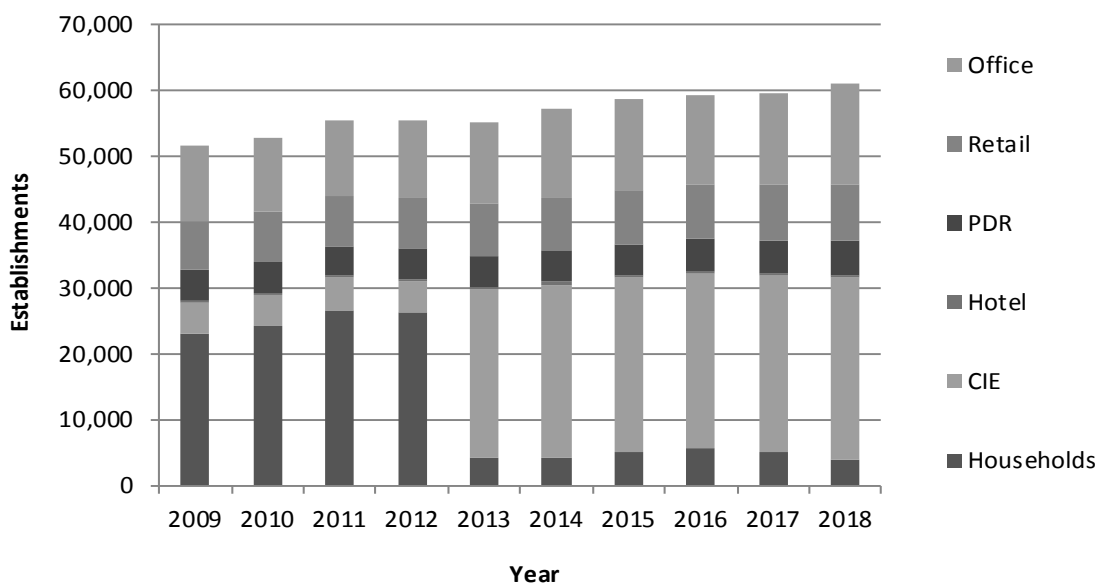


Table & Figure 4.2.1**OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2009–2018**

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

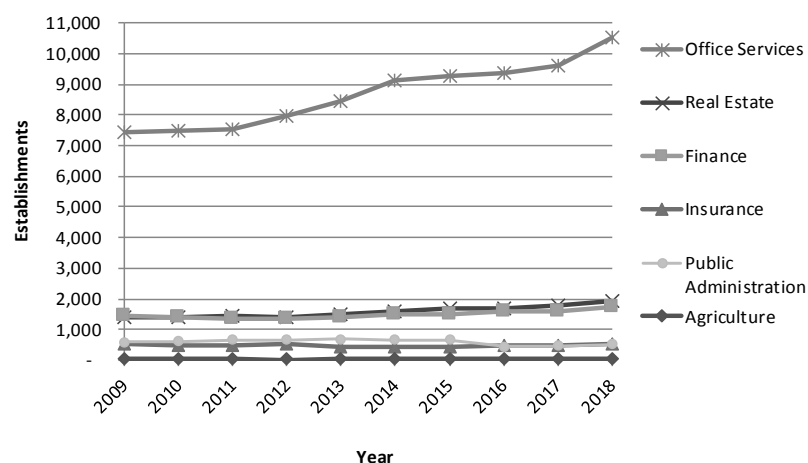
Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Agriculture	39	43	41	38	40	44	43	42	44	50
Finance	1,434	1,399	1,357	1,353	1,410	1,493	1,504	1,593	1,612	1,747
Insurance	525	498	492	508	445	454	456	466	474	519
Real Estate	1,391	1,412	1,424	1,417	1,506	1,604	1,668	1,699	1,778	1,940
Office Services	7,429	7,456	7,544	7,951	8,454	9,104	9,260	9,340	9,612	10,532
Public Administration	601	622	653	671	688	668	663	438	468	526
TOTAL	11,419	11,430	11,511	11,938	12,543	13,367	13,594	13,578	13,988	15,314

Annual Percentage Distribution

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Agriculture	0.3	0.4	0.4	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Finance	12.6	12.2	11.8	11.3	11.2	11.2	11.1	11.7	11.5	11.4
Insurance	4.6	4.4	4.3	4.3	3.5	3.4	3.4	3.4	3.4	3.4
Real Estate	12.2	12.4	12.4	11.9	12.0	12.0	12.3	12.5	12.7	12.7
Office Services	65.1	65.2	65.5	66.6	67.4	68.1	68.1	68.8	68.7	68.8
Public Administration	5.3	5.4	5.7	5.6	5.5	5.0	4.9	3.2	3.3	3.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Agriculture	10.3	-4.7	-7.3	5.3	7.5	-2.3	-2.3	4.8	13.6
Finance	-2.4	-3.0	-0.3	4.2	6.7	0.7	5.9	1.2	8.4
Insurance	-5.1	-1.2	3.3	-12.4	2.5	0.4	2.2	1.7	9.5
Real Estate	1.5	0.8	-0.5	6.3	10.8	4.0	1.9	4.6	9.1
Office Services	0.4	1.2	5.4	6.3	9.5	1.7	0.9	2.9	9.6
Public Administration	3.5	5.0	2.8	2.5	-3.6	-0.7	-33.9	6.8	12.4
TOTAL	0.1	0.7	3.7	5.1	8.4	1.7	-0.1	3.0	9.5

**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, 2009–2018**

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

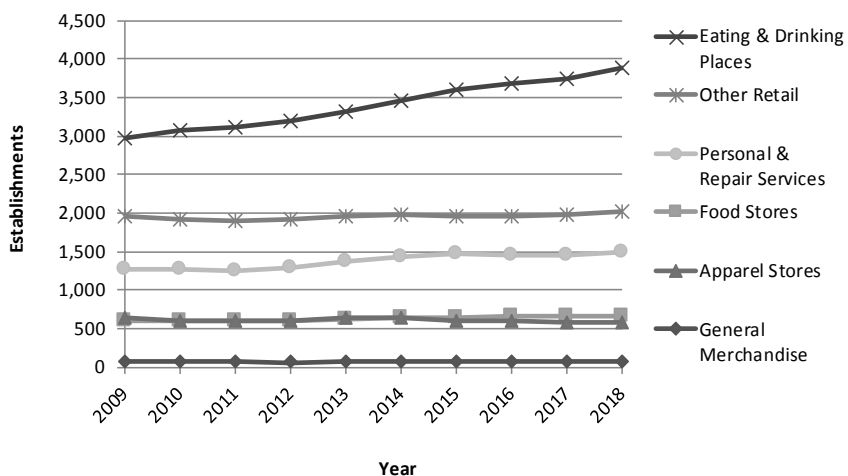
Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
General Merchandise	72	76	67	62	63	63	70	73	68	66
Food Stores	598	597	597	605	624	644	646	651	656	663
Apparel Stores	630	604	598	605	635	630	597	594	573	582
Eating & Drinking Places	2,972	3,078	3,108	3,189	3,307	3,448	3,588	3,676	3,742	3,878
Other Retail	1,962	1,914	1,900	1,910	1,955	1,971	1,958	1,964	1,978	2,008
Personal & Repair Services	1,262	1,272	1,246	1,296	1,363	1,433	1,472	1,445	1,446	1,499
TOTAL	7,496	7,541	7,516	7,667	7,947	8,189	8,331	8,403	8,463	8,696

Annual Percentage Distribution

Industry Group	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
General Merchandise	1.0	1.0	0.9	0.8	0.8	0.8	0.8	0.9	0.8	0.8
Food Stores	8.0	7.9	7.9	7.9	7.9	7.9	7.8	7.7	7.8	7.6
Apparel Stores	8.4	8.0	8.0	7.9	8.0	7.7	7.2	7.1	6.8	6.7
Eating & Drinking Places	39.6	40.8	41.4	41.6	41.6	42.1	43.1	43.7	44.2	44.6
Other Retail	26.2	25.4	25.3	24.9	24.6	24.1	23.5	23.4	23.4	23.1
Personal & Repair Services	16.8	16.9	16.6	16.9	17.2	17.5	17.7	17.2	17.1	17.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
General Merchandise	5.6	-11.8	-7.5	1.6	11.1	11.1	4.3	-6.8	-2.9
Food Stores	-0.2	0.0	1.3	3.1	3.5	0.3	0.8	0.8	1.1
Apparel Stores	-4.1	-1.0	1.2	5.0	-6.0	-5.2	-0.5	-3.5	1.6
Eating & Drinking Places	3.6	1.0	2.6	3.7	8.5	4.1	2.5	1.8	3.6
Other Retail	-2.4	-0.7	0.5	2.4	0.2	-0.7	0.3	0.7	1.5
Personal & Repair Services	0.8	-2.0	4.0	5.2	8.0	2.7	-1.8	0.1	3.7
TOTAL	0.6	-0.3	2.0	3.7	4.8	1.7	0.9	0.7	2.8

**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, 2009–2018**

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>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
Construction	1,641	1,598	1,538	1,515	1,551	1,610	1,632	1,686	1,715	1,836
Transportation	418	417	398	400	408	429	433	430	437	446
Utilities	22	25	31	36	36	44	48	46	52	61
Information	247	240	230	229	228	218	180	170	164	159
Wholesale	1,253	1,210	1,178	1,196	1,268	1,257	1,236	1,212	1,171	1,203
Food Manufacturing	140	144	146	157	161	170	177	190	204	220
Apparel Manufacturing	155	146	141	133	128	119	113	107	97	92
Printing & Publishing	342	328	324	338	318	343	392	445	496	683
Other Manufacturing	500	506	499	495	498	511	506	513	543	610
TOTAL	4,718	4,614	4,485	4,499	4,596	4,701	4,717	4,799	4,879	5,310

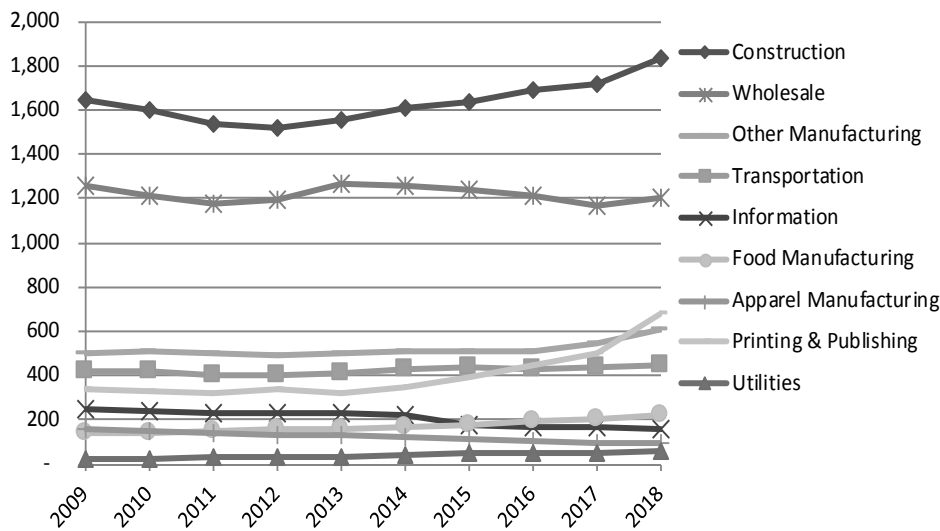
Annual Percentage Distribution

<i>Industry Group</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
Construction	34.8	34.6	34.3	33.7	33.7	34.2	34.6	35.1	35.2	34.6
Transportation	8.9	9.0	8.9	8.9	8.9	9.1	9.2	9.0	9.0	8.4
Utilities	0.5	0.5	0.7	0.8	0.8	0.9	1.0	1.0	1.1	1.1
Information	5.2	5.2	5.1	5.1	5.0	4.6	3.8	3.5	3.4	3.0
Wholesale	26.6	26.2	26.3	26.6	27.6	26.7	26.2	25.3	24.0	22.7
Food Manufacturing	3.0	3.1	3.3	3.5	3.5	3.6	3.8	4.0	4.2	4.1
Apparel Manufacturing	3.3	3.2	3.1	3.0	2.8	2.5	2.4	2.2	2.0	1.7
Printing & Publishing	7.2	7.1	7.2	7.5	6.9	7.3	8.3	9.3	10.2	12.9
Other Manufacturing	10.6	11.0	11.1	11.0	10.8	10.9	10.7	10.7	11.1	11.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Industry Group</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>	<i>2017-18</i>
Construction	-2.6	-3.8	-1.5	2.4	5.2	1.4	3.3	1.7	7.1
Transportation	-0.2	-4.6	0.5	2.0	6.1	0.9	-0.7	1.6	2.1
Utilities	13.6	24.0	16.1	0.0	33.3	9.1	-4.2	13.0	17.3
Information	-2.8	-4.2	-0.4	-0.4	-21.1	-17.4	-5.6	-3.5	-3.0
Wholesale	-3.4	-2.6	1.5	6.0	-2.5	-1.7	-1.9	-3.4	2.7
Food Manufacturing	2.9	1.4	7.5	2.5	9.9	4.1	7.3	7.4	7.8
Apparel Manufacturing	-5.8	-3.4	-5.7	-3.8	-11.7	-5.0	-5.3	-9.3	-5.2
Printing & Publishing	-4.1	-1.2	4.3	-5.9	23.3	14.3	13.5	11.5	37.7
Other Manufacturing	1.2	-1.4	-0.8	0.6	1.6	-1.0	1.4	5.8	12.3
TOTAL	-2.2	-2.8	0.3	2.2	2.6	0.3	1.7	1.7	8.8

Figure 4.2.3
PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2009–2018



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, 2009–2018**

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>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
Arts & Recreation	416	246	249	253	265	287	291	306	304	329
Health Care	2,071	2,111	2,113	2,120	2,152	2,238	2,259	2,290	2,285	2,364
Educational Services	703	705	714	726	906	934	934	972	991	1,075
Social Assistance*	623	628	655	677	21,082	21,523	21,706	21,684	21,864	22,284
Other CIE Services*	926	1,104	1,112	1,154	1,192	1,264	1,279	1,311	1,349	1,414
Pvt HH*	22,864	24,161	26,607	26,140	4,183	4,239	5,034	5,655	5,131	3,913
TOTAL	27,603	28,955	31,450	31,070	29,780	30,485	31,503	32,218	31,924	31,379

Annual Percentage Distribution

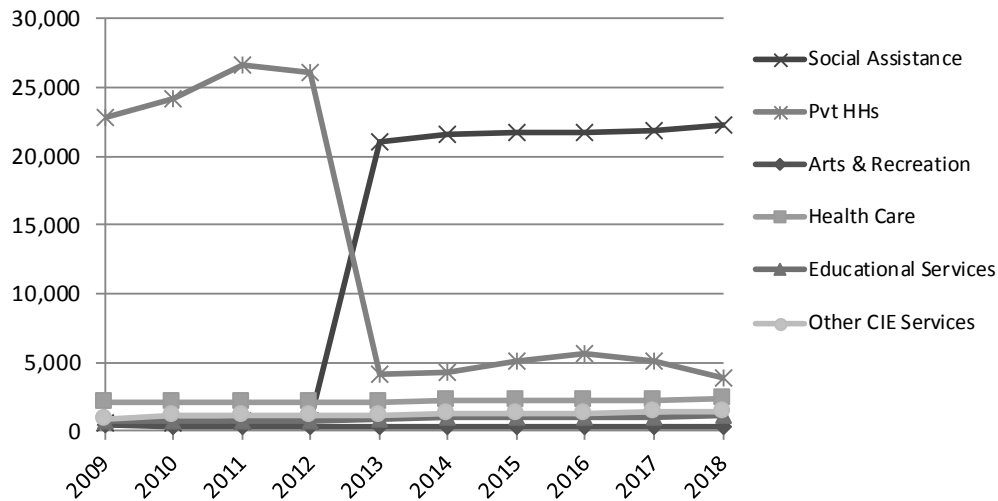
<i>Industry Group</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
Arts & Recreation	1.5	0.8	0.8	0.8	0.9	0.9	0.9	0.9	1.0	1.0
Health Care	7.5	7.3	6.7	6.8	7.2	7.3	7.2	7.1	7.2	7.5
Educational Services	2.5	2.4	2.3	2.3	3.0	3.1	3.0	3.0	3.1	3.4
Social Assistance*	2.3	2.2	2.1	2.2	70.8	70.6	68.9	67.3	68.5	71.0
Other CIE Services*	3.4	3.8	3.5	3.7	4.0	4.1	4.1	4.1	4.2	4.5
Pvt HH*	82.8	83.4	84.6	84.1	14.0	13.9	16.0	17.6	16.1	12.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Industry Group</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>	<i>2017-18</i>
Arts & Recreation	-40.8	1.2	1.6	4.7	8.3	1.4	5.2	-0.7	8.2
Health Care	1.9	0.1	0.3	1.5	4.0	0.9	1.4	-0.2	3.5
Educational Services	0.3	1.3	1.7	24.8	3.1	0.0	4.1	2.0	8.5
Social Assistance*	0.8	4.3	3.4	3,014.0	2.1	0.9	-0.1	0.8	1.9
Other CIE Services*	19.2	0.7	3.8	3.3	6.0	1.2	2.5	2.9	4.8
Pvt HH*	5.7	10.1	-1.8	-84.0	1.3	18.8	12.3	-9.3	-23.7
TOTAL	4.9	8.6	-1.2	-4.2	2.4	3.3	2.3	-0.9	-1.7

* 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, 2009–2018



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, 2018

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&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	216	266	707	3	1,596	64	2,852
Civic Center	958	525	131	67	2,344	82	4,107
Financial	5,851	1,313	861	52	2,071	368	10,516
Mission	620	670	345	8	1,671	235	3,549
North Beach	471	496	149	22	1,719	102	2,959
North Central	1,140	1,070	265	43	2,674	670	5,862
Northwest	723	629	301	7	2,314	437	4,411
South of Market	2,374	1,311	1,131	45	2,860	269	7,990
Southwest	1,688	1,628	1,052	19	8,007	1,150	13,544
Van Ness	610	565	126	42	1,817	185	3,345
Treasure Island	11	2	18	0	69	4	104
Unclassified	652	220	226	10	324	347	1,779
TOTAL	15,314	8,695	5,312	318	27,466	3,913	61,018

Percentage Distribution by Commerce and Industry District

<i>C&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	3.1	13.3	0.9	5.8	1.6	4.7
Civic Center	6.3	6.0	2.5	21.1	8.5	2.1	6.7
Financial	38.2	15.1	16.2	16.4	7.5	9.4	17.2
Mission	4.0	7.7	6.5	2.5	6.1	6.0	5.8
North Beach	3.1	5.7	2.8	6.9	6.3	2.6	4.8
North Central	7.4	12.3	5.0	13.5	9.7	17.1	9.6
Northwest	4.7	7.2	5.7	2.2	8.4	11.2	7.2
South of Market	15.5	15.1	21.3	14.2	10.4	6.9	13.1
Southwest	11.0	18.7	19.8	6.0	29.2	29.4	22.2
Van Ness	4.0	6.5	2.4	13.2	6.6	4.7	5.5
Treasure Island	0.1	0.0	0.3	0.0	0.3	0.1	0.2
Unclassified	4.3	2.5	4.3	3.1	1.2	8.9	2.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

<i>C&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	7.6	9.3	24.8	0.1	56.0	2.2	100.0
Civic Center	23.3	12.8	3.2	1.6	57.1	2.0	100.0
Financial	55.6	12.5	8.2	0.5	19.7	3.5	100.0
Mission	17.5	18.9	9.7	0.2	47.1	6.6	100.0
North Beach	15.9	16.8	5.0	0.7	58.1	3.4	100.0
North Central	19.4	18.3	4.5	0.7	45.6	11.4	100.0
Northwest	16.4	14.3	6.8	0.2	52.5	9.9	100.0
South of Market	29.7	16.4	14.2	0.6	35.8	3.4	100.0
Southwest	12.5	12.0	7.8	0.1	59.1	8.5	100.0
Van Ness	18.2	16.9	3.8	1.3	54.3	5.5	100.0
Treasure Island	10.6	1.9	17.3	0.0	66.3	3.8	100.0
Unclassified	36.6	12.4	12.7	0.6	18.2	19.5	100.0
TOTAL	25.1	14.2	8.7	0.5	45.0	6.4	100.0

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, 2018

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&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	2,119	259	233	154	50	31	6	0	0	2,852
Civic Center	2,979	398	326	242	102	38	13	6	3	4,107
Financial	5,731	1,607	1,217	1,088	465	255	95	32	27	10,517
Mission	2,630	373	293	170	59	18	4	2	0	3,549
North Beach	2,278	273	202	140	39	21	4	2	0	2,959
North Central	4,502	576	424	239	81	31	2	1	6	5,862
Northwest	3,514	385	286	149	41	22	9	3	2	4,411
South of Market	5,107	971	839	587	230	146	62	24	24	7,990
Southwest	11,258	1,032	690	407	109	36	8	2	1	13,543
Van Ness	2,636	288	216	137	38	24	5	1	0	3,345
Treasure Island	85	11	3	4	0	1	0	0	0	104
Unclassified	1,194	232	166	111	38	25	10	3	1	1,780
TOTAL	44,033	6,405	4,895	3,428	1,252	648	218	76	64	61,019

Percentage Distribution by C&I District

<i>C&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	4.8	4.0	4.8	4.5	4.0	4.8	2.8	0.0	0.0	4.7
Civic Center	6.8	6.2	6.7	7.1	8.1	5.9	6.0	7.9	4.7	6.7
Financial	13.0	25.1	24.9	31.7	37.1	39.4	43.6	42.1	42.2	17.2
Mission	6.0	5.8	6.0	5.0	4.7	2.8	1.8	2.6	0.0	5.8
North Beach	5.2	4.3	4.1	4.1	3.1	3.2	1.8	2.6	0.0	4.8
North Central	10.2	9.0	8.7	7.0	6.5	4.8	0.9	1.3	9.4	9.6
Northwest	8.0	6.0	5.8	4.3	3.3	3.4	4.1	3.9	3.1	7.2
South of Market	11.6	15.2	17.1	17.1	18.4	22.5	28.4	31.6	37.5	13.1
Southwest	25.6	16.1	14.1	11.9	8.7	5.6	3.7	2.6	1.6	22.2
Van Ness	6.0	4.5	4.4	4.0	3.0	3.7	2.3	1.3	0.0	5.5
Treasure Island	0.2	0.2	0.1	0.1	0.0	0.2	0.0	0.0	0.0	0.2
Unclassified	2.7	3.6	3.4	3.2	3.0	3.9	4.6	3.9	1.6	2.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Size Class

<i>C&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	74.3	9.1	8.2	5.4	1.8	1.1	0.2	0.0	0.0	100.0
Civic Center	72.5	9.7	7.9	5.9	2.5	0.9	0.3	0.1	0.1	100.0
Financial	54.5	15.3	11.6	10.3	4.4	2.4	0.9	0.3	0.3	100.0
Mission	74.1	10.5	8.3	4.8	1.7	0.5	0.1	0.1	0.0	100.0
North Beach	77.0	9.2	6.8	4.7	1.3	0.7	0.1	0.1	0.0	100.0
North Central	76.8	9.8	7.2	4.1	1.4	0.5	0.0	0.0	0.1	100.0
Northwest	79.7	8.7	6.5	3.4	0.9	0.5	0.2	0.1	0.0	100.0
South of Market	63.9	12.2	10.5	7.3	2.9	1.8	0.8	0.3	0.3	100.0
Southwest	83.1	7.6	5.1	3.0	0.8	0.3	0.1	0.0	0.0	100.0
Van Ness	78.8	8.6	6.5	4.1	1.1	0.7	0.1	0.0	0.0	100.0
Treasure Island	81.7	10.6	2.9	3.8	0.0	1.0	0.0	0.0	0.0	100.0
Unclassified	67.1	13.0	9.3	6.2	2.1	1.4	0.6	0.2	0.1	100.0
TOTAL	72.2	10.5	8.0	5.6	2.1	1.1	0.4	0.1	0.1	100.0

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 2018. Section 5.3 reports city government revenues and expenditures in fiscal year 2018 (July 1, 2017 to June 30, 2018). 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 2009 to 2018. 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 2009–2018. 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, 2009–2018**

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)

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$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	\$56,426,237
Retail	\$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	\$5,367,025
PDR	\$5,897,953	\$5,868,508	\$6,007,279	\$6,862,515	\$7,137,839	\$7,928,621	\$8,649,602	\$10,123,258	\$11,290,552	\$12,580,530
Hotel	\$695,174	\$691,582	\$736,805	\$740,550	\$803,545	\$778,152	\$830,804	\$848,666	\$825,242	\$856,737
CIE	\$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	\$12,278,952
Pvt HH	\$375,303	\$314,522	\$288,029	\$293,476	\$75,279	\$267,581	\$391,952	\$374,003	\$363,945	\$229,468
TOTAL	\$40,441,705	\$41,667,560	\$45,112,659	\$48,993,364	\$52,480,447	\$58,876,225	\$65,450,879	\$71,478,911	\$77,904,378	\$87,738,948

Inflation-Adjusted (2017 \$ 000s)

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$29,976,332	\$30,622,568	\$33,205,625	\$34,976,472	\$37,184,977	\$41,710,209	\$45,641,779	\$48,331,977	\$51,371,407	\$56,426,237
Retail	\$3,902,227	\$4,000,961	\$4,140,239	\$4,401,668	\$4,632,983	\$4,813,129	\$5,210,526	\$5,171,884	\$5,400,379	\$5,367,025
PDR	\$7,619,568	\$7,479,072	\$7,461,700	\$8,289,241	\$8,445,048	\$9,121,477	\$9,697,434	\$11,018,427	\$11,905,420	\$12,580,530
Hotel	\$898,096	\$881,382	\$915,193	\$895,816	\$950,704	\$895,224	\$931,450	\$923,711	\$870,184	\$856,737
CIE	\$9,365,581	\$9,611,182	\$9,761,063	\$10,168,610	\$10,647,721	\$10,886,241	\$11,459,125	\$11,946,502	\$12,215,793	\$12,278,952
Pvt HH	\$484,854	\$507,714	\$551,055	\$533,706	\$230,173	\$307,839	\$439,434	\$407,075	\$383,765	\$229,468
TOTAL	\$52,246,657	\$53,102,880	\$56,034,875	\$59,265,513	\$62,091,606	\$67,734,120	\$73,379,748	\$77,799,576	\$82,146,948	\$87,738,948

Annual Percentage Distribution

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	57.4	57.7	59.3	59.0	59.9	61.6	62.2	62.1	62.5	64.3
Retail	7.5	7.5	7.4	7.4	7.5	7.1	7.1	6.6	6.6	6.1
PDR	14.6	14.1	13.3	14.0	13.6	13.5	13.2	14.2	14.5	14.3
Hotel	1.7	1.7	1.6	1.5	1.5	1.3	1.3	1.2	1.1	1.0
CIE	17.9	18.1	17.4	17.2	17.1	16.1	15.6	15.4	14.9	14.0
Pvt HH	0.9	1.0	1.0	0.9	0.4	0.5	0.6	0.5	0.5	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	2.2	8.4	5.3	6.3	12.2	9.4	5.9	6.3	9.8
Retail	2.5	3.5	6.3	5.3	3.9	8.3	-0.7	4.4	-0.6
PDR	-1.8	-0.2	11.1	1.9	8.0	6.3	13.6	8.1	5.7
Hotel	-1.9	3.8	-2.1	6.1	-5.8	4.0	-0.8	-5.8	-1.5
CIE	2.6	1.6	4.2	4.7	2.2	5.3	4.3	2.3	0.5
Pvt HH	4.7	8.5	-3.1	-56.9	33.7	42.7	-7.4	-5.7	-40.2
TOTAL	1.6	5.5	5.8	4.8	9.1	8.3	6.0	5.6	6.8

Figure 5.1.1a
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2018

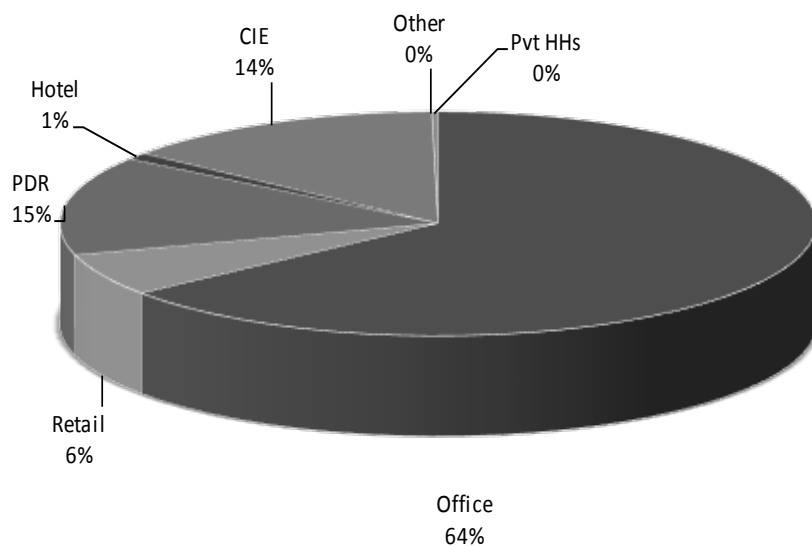


Figure 5.1.1b
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2009–2018

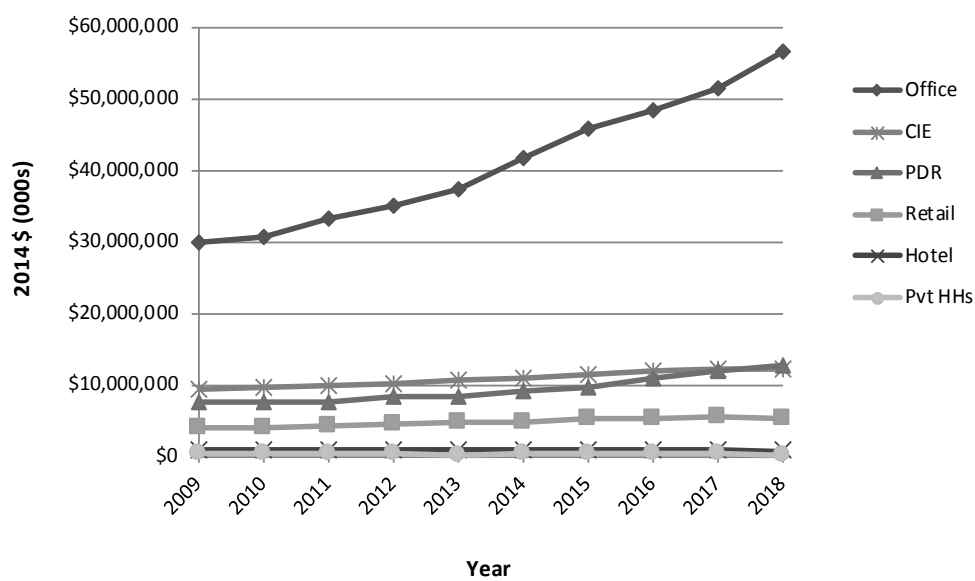


Table & Figure 5.1.2**ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 2009–2018**

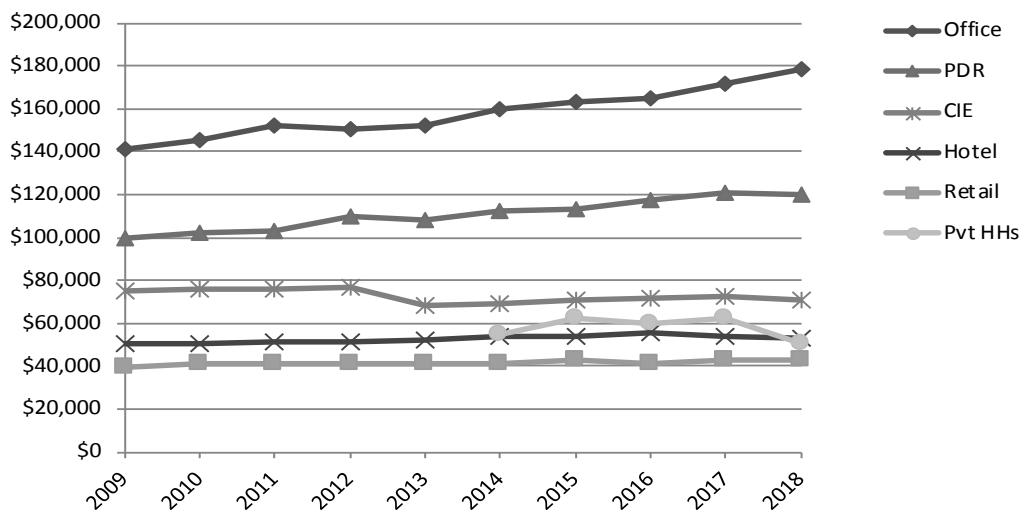
This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.2.

Wages per Worker (2018 \$)

Land Use Category	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$141,475	\$145,096	\$151,737	\$150,820	\$152,234	\$159,824	\$163,058	\$164,776	\$172,016	\$178,420
Retail	\$39,706	\$40,768	\$41,156	\$41,406	\$41,457	\$40,909	\$42,410	\$41,265	\$42,823	\$42,716
PDR	\$99,308	\$102,499	\$102,968	\$109,592	\$107,946	\$111,894	\$113,302	\$117,045	\$120,436	\$120,283
Hotel	\$50,376	\$50,170	\$51,430	\$51,484	\$52,421	\$53,780	\$53,897	\$55,915	\$53,908	\$52,561
CIE	\$75,026	\$76,154	\$75,658	\$76,541	\$68,186	\$68,905	\$70,822	\$71,506	\$72,364	\$70,805
Pvt HH	-	-	\$27,110	\$24,089	\$55,962	\$55,001	\$62,642	\$59,401	\$62,523	\$50,278
Average	\$98,663	\$100,969	\$104,017	\$105,062	\$101,348	\$105,772	\$108,798	\$110,631	\$114,940	\$118,442

Percentage Change

Land Use Category	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	2.6	4.6	-0.6	0.9	5.0	2.0	1.1	4.4	3.7
Retail	2.7	1.0	0.6	0.1	-1.3	3.7	-2.7	3.8	-0.2
PDR	3.2	0.5	6.4	-1.5	3.7	1.3	3.3	2.9	-0.1
Hotel	-0.4	2.5	0.1	1.8	2.6	0.2	3.7	-3.6	-2.5
CIE	1.5	-0.7	1.2	-10.9	1.1	2.8	1.0	1.2	-2.2
Pvt HH	-	--	-11.1	132.3	-1.7	13.9	-5.2	5.3	-19.6
TOTAL	2.3	3.0	1.0	-3.5	4.4	2.9	1.7	3.9	3.0



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	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
All Retail Sales	\$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	\$14,195,515
All Outlets	\$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	\$20,206,164

Inflation-Adjusted (2017 \$ 000s)

Type of Sales	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
All Retail Sales	\$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	\$14,195,515
All Outlets	\$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	\$20,206,164

Percentage Change

Type of Sales	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
All Retail Sales	4.0%	8.0%	6.6%	6.7%	3.5%	-1.8%	0.9%	-2.2%	6.3%
All Outlets	5.0%	8.0%	4.3%	4.8%	5.1%	-1.4%	0.3%	-1.1%	2.6%

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, 2009–2018 (2018 \$000s)

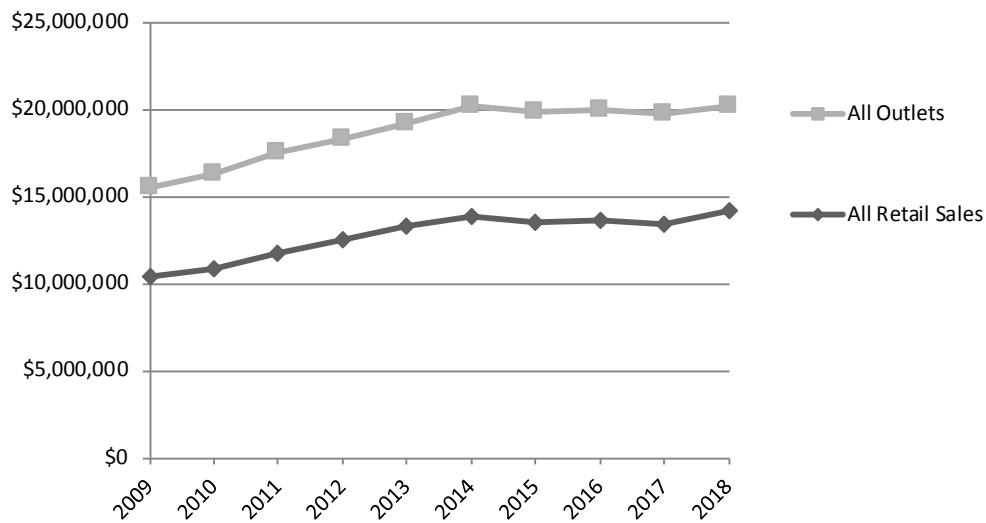


Table 5.2.2
TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2018

This table looks more closely at the type of retail sales that occurred in 2018, 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	3,076	\$2,110,793
General Merchandise	337	\$810,896
Food Stores	1,350	\$862,096
Eating & Drinking	5,175	\$4,874,214
Home Furnishings & Appliances	1,086	\$1,031,744
Building Materials	326	\$719,456
Service Stations	115	\$616,193
Automotive Dealers and Supplies	216	\$596,903
Other Retail Stores	7,996	\$2,575,050
TOTAL RETAIL STORES	19,674	\$14,195,515
TOTAL OUTLETS	31,488	\$20,206,164

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.

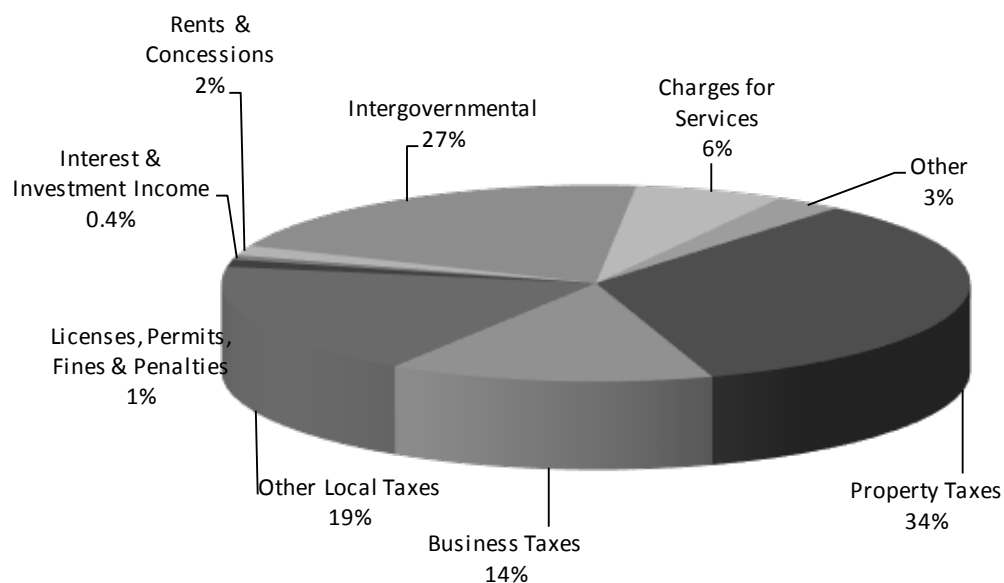
Sources:

- 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 2018**

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2018. This data is shown graphically in Figure 5.3.1.

<i>Revenue Source</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Property Taxes	\$2,171,601	33.9
Business Taxes	\$899,142	14.0
Other Local Taxes	\$1,197,032	18.7
Licenses, Permits, Fines & Penalties	\$77,400	1.2
Interest & Investment Income	\$45,890	0.7
Rents & Concessions	\$105,284	1.6
Intergovernmental	\$1,313,419	20.5
Federal -	\$421,024	6.6
State -	\$875,402	13.7
Other -	\$16,993	0.3
Charges for Services	\$415,569	6.5
Other	\$186,034	2.9
TOTAL	\$6,411,371	100.0



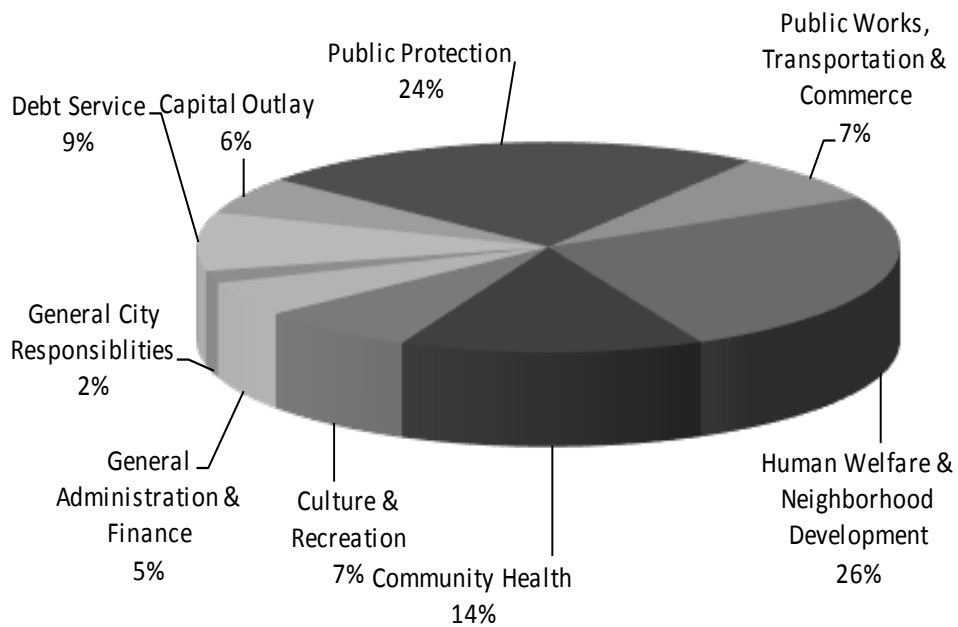
Note: Fiscal Year 2016 runs from July 1, 2017 to June 30, 2018

Source: San Francisco Controller, Comprehensive Annual Financial Report.

Table & Figure 5.3.2**SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2018**

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2018. This data is shown graphically in Figure 5.3.2.

<i>Expenditure Function</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Public Protection	\$1,378,754	23.6
Public Works, Transportation & Commerce	\$441,868	7.6
Human Welfare & Neighborhood Development	\$1,499,216	25.6
Community Health	\$815,762	13.9
Culture & Recreation	\$424,794	7.3
General Administration & Finance	\$312,441	5.3
General City Responsibilities	\$110,920	1.9
Debt Service	\$527,000	9.0
Capital Outlay	\$337,741	5.8
TOTAL	\$5,848,496	100.00



Note: Fiscal Year 2016 runs from July 1, 2017 to June 30, 2018

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).

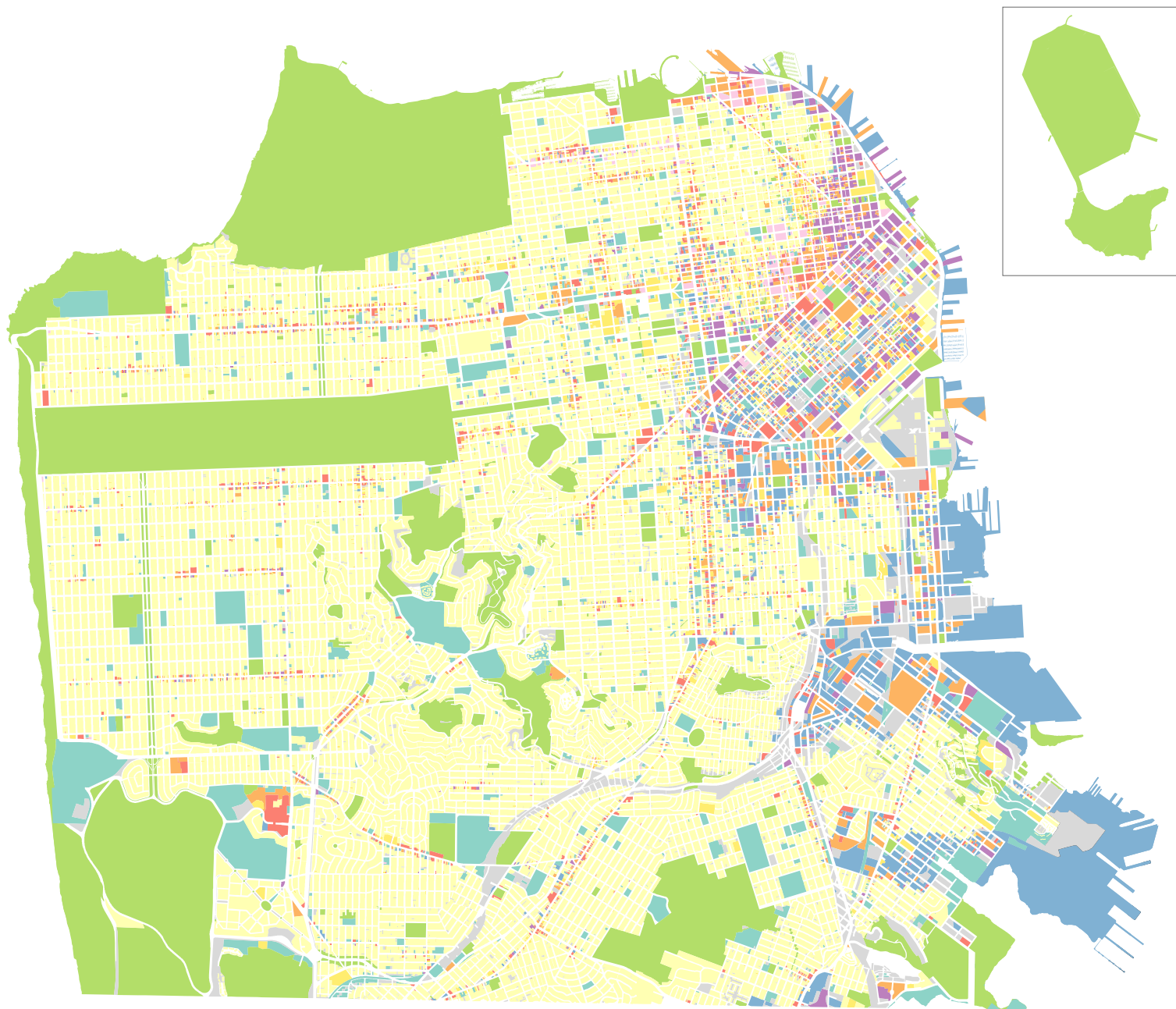
Section 6.5 reports total office space in San Francisco from 2009 to 2018. It includes absolute numbers as well as percentage changes over time. The source of these data is Cushman & Wakefield realtors.

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

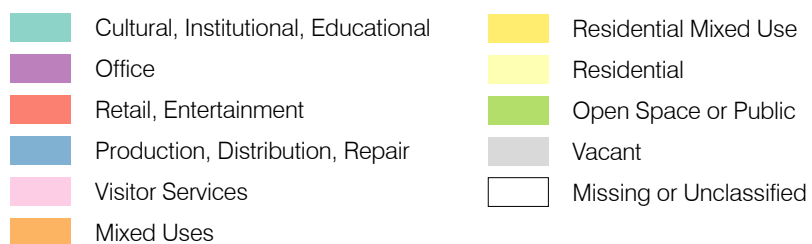


Table 6.1.1.A**ALL BUILDING PERMITS BY LAND USE CATEGORY, 2009–2018**

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

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	2,907	2,968	3,406	3,712	4,410	4,465	4,981	4,679	4,275	5,144
Retail	2,203	1,967	2,178	2,442	2,337	2,209	2,222	2,191	2,015	2,354
PDR	236	205	248	231	283	306	371	324	396	390
Hotel	260	126	198	224	249	285	355	310	327	317
CIE	547	494	541	614	696	702	697	741	685	752
Residential	15,714	15,533	15,288	15,876	17,800	18,900	20,198	19,537	20,850	19,702
Other	600	631	754	1,196	1,227	1,304	987	970	986	1,106
TOTAL	22,467	21,924	22,613	24,295	27,002	28,171	29,811	28,752	29,534	29,765

Annual Percentage Distribution

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	12.9	13.5	15.1	15.3	16.3	15.8	16.7	16.3	14.5	17.3
Retail	9.8	9.0	9.6	10.1	8.7	7.8	7.5	7.6	6.8	7.9
PDR	1.1	0.9	1.1	1.0	1.0	1.1	1.2	1.1	1.3	1.3
Hotel	1.2	0.6	0.9	0.9	0.9	1.0	1.2	1.1	1.1	1.1
CIE	2.4	2.3	2.4	2.5	2.6	2.5	2.3	2.6	2.3	2.5
Residential	69.9	70.8	67.6	65.3	65.9	67.1	67.8	68.0	70.6	66.2
Other	2.7	2.9	3.3	4.9	4.5	4.6	3.3	3.4	3.3	3.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	2.1	14.8	9.0	18.8	1.2	11.6	-6.1	-8.6	20.3
Retail	-10.7	10.7	12.1	-4.3	-5.5	0.6	-1.4	-8.0	16.8
PDR	-13.1	21.0	-6.9	22.5	8.1	21.2	-12.7	22.2	-1.5
Hotel	-51.5	57.1	13.1	11.2	14.5	24.6	-12.7	5.5	-3.1
CIE	-9.7	9.5	13.5	13.4	0.9	-0.7	6.3	-7.6	9.8
Residential	-1.2	-1.6	3.8	12.1	6.2	6.9	-3.3	6.7	-5.5
Other	5.2	19.5	58.6	2.6	6.3	-24.3	-1.7	1.6	12.2
TOTAL	-2.4	3.1	7.4	11.1	4.3	5.8	-3.6	2.7	0.8

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, 2009–2018**

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 2018 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 2018 \$ 000s)

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$357,298	\$469,001	\$1,024,219	\$889,060	\$1,460,412	\$1,218,133	\$1,704,991	\$1,043,546	\$1,132,770	\$1,489,947
Retail	\$115,689	\$215,643	\$187,420	\$353,412	\$225,344	\$163,709	\$467,470	\$229,134	\$215,922	\$306,185
PDR	\$28,839	\$15,481	\$20,484	\$21,200	\$39,204	\$101,219	\$65,284	\$89,162	\$62,537	\$95,472
Hotel	\$32,441	\$25,003	\$63,900	\$37,783	\$132,325	\$65,569	\$162,878	\$274,920	\$55,457	\$113,251
CIE	\$101,617	\$164,996	\$207,726	\$233,077	\$177,084	\$421,473	\$146,421	\$1,025,676	\$175,195	\$145,009
Residential	\$841,588	\$1,265,163	\$1,270,802	\$2,421,583	\$3,049,829	\$2,919,097	\$3,904,911	\$4,100,569	\$2,263,353	\$2,368,971
Other	\$10,501	\$10,266	\$18,774	\$261,225	\$111,220	\$61,138	\$114,603	\$147,722	\$91,124	\$76,309
TOTAL	\$1,487,972	\$2,165,553	\$2,793,326	\$4,217,340	\$5,195,419	\$4,950,338	\$6,566,558	\$6,910,729	\$3,996,357	\$4,595,143

Annual Percentage Distribution

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	24.0	21.7	36.7	21.1	28.1	24.6	26.0	15.1	28.3	32.4
Retail	7.8	10.0	6.7	8.4	4.3	3.3	7.1	3.3	5.4	6.7
PDR	1.9	0.7	0.7	0.5	0.8	2.0	1.0	1.3	1.6	2.1
Hotel	6.8	7.6	7.4	5.5	3.4	8.5	2.2	14.8	4.4	2.5
CIE	2.2	1.2	2.3	0.9	2.5	1.3	2.5	4.0	1.4	3.2
Residential	56.6	58.4	45.5	57.4	58.7	59.0	59.5	59.3	56.6	51.6
Other	0.7	0.5	0.7	6.2	2.1	1.2	1.7	2.1	2.3	1.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	31.3	118.4	-13.2	64.3	-16.6	40.0	-38.8	8.6	31.5
Retail	86.4	-13.1	88.6	-36.2	-27.4	185.5	-51.0	-5.8	41.8
PDR	-46.3	32.3	3.5	84.9	158.2	-35.5	36.6	-29.9	52.7
Hotel	62.4	25.9	12.2	-24.0	138.0	-65.3	600.5	-82.9	104.2
CIE	-22.9	155.6	-40.9	250.2	-50.4	148.4	68.8	-79.8	-17.2
Residential	50.3	0.4	90.6	25.9	-4.3	33.8	5.0	-44.8	4.7
Other	-2.2	82.9	1291.4	-57.4	-45.0	87.4	28.9	-38.3	-16.3
TOTAL	45.5	29.0	51.0	23.2	-4.7	32.6	5.2	-42.2	15.0

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, 2009–2018**

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 2018 \$ 000s)

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$122.9	\$158.0	\$300.7	\$239.5	\$331.2	\$272.8	\$342.3	\$223.0	\$265.0	\$289.6
Retail	\$52.5	\$109.6	\$86.1	\$144.7	\$96.4	\$74.1	\$210.4	\$104.6	\$107.2	\$130.1
PDR	\$122.2	\$75.5	\$82.6	\$91.8	\$138.5	\$330.8	\$176.0	\$275.2	\$157.9	\$244.8
Hotel	\$124.8	\$198.4	\$322.7	\$168.7	\$531.4	\$230.1	\$458.8	\$886.8	\$169.6	\$357.3
CIE	\$185.8	\$334.0	\$384.0	\$379.6	\$254.4	\$600.4	\$210.1	\$1,384.2	\$255.8	\$192.8
Residential	\$53.6	\$81.4	\$83.1	\$152.5	\$171.3	\$154.4	\$193.3	\$209.9	\$108.6	\$120.2
Other	\$17.5	\$16.3	\$24.9	\$218.4	\$90.6	\$46.9	\$116.1	\$152.3	\$92.4	\$69.0
Average	\$66.2	\$98.8	\$123.5	\$173.6	\$192.4	\$175.7	\$220.3	\$240.4	\$135.3	\$154.4

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	28.6	90.3	-20.4	38.3	-17.6	25.5	-34.8	18.8	9.3
Retail	108.8	-21.5	68.2	-33.4	-23.1	183.9	-50.3	2.5	21.4
PDR	-38.2	9.4	11.1	50.9	138.8	-46.8	56.4	-42.6	55.0
Hotel	59.0	62.6	-47.7	215.1	-56.7	99.4	93.3	-80.9	110.7
CIE	79.8	15.0	-1.1	-33.0	136.0	-65.0	558.9	-81.5	-24.6
Residential	52.1	2.1	83.5	12.3	-9.9	25.2	8.6	-48.3	10.8
Other	-7.0	53.0	777.2	-58.5	-48.3	147.7	31.2	-39.3	-25.3
TOTAL	49.1	25.1	40.5	10.8	-8.7	25.4	9.1	-43.7	14.1

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, 2009–2018**

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>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	0	1	8	9	8	7	11	6	5	4
Retail	6	10	9	10	8	10	12	10	6	9
PDR	4	5	5	5	9	7	9	4	5	8
Hotel	0	0	1	0	2	1	2	4	0	1
CIE	5	8	3	10	10	5	9	9	4	4
Residential	63	92	58	148	155	225	268	164	107	112
Other	3	0	9	17	9	5	0	1	0	2
TOTAL	81	116	93	199	201	260	311	198	127	140

Annual Percentage Distribution

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	0.0	0.9	8.6	4.5	4.0	2.7	3.5	3.0	3.9	2.9
Retail	7.4	8.6	9.7	5.0	4.0	3.8	3.9	5.1	4.7	6.4
PDR	4.9	4.3	5.4	2.5	4.5	2.7	2.9	2.0	3.9	5.7
Hotel	0.0	0.0	1.1	0.0	1.0	0.4	0.6	2.0	0.0	0.7
CIE	6.2	6.9	3.2	5.0	5.0	1.9	2.9	4.5	3.1	2.9
Residential	77.8	79.3	62.4	74.4	77.1	86.5	86.2	82.8	84.3	80.0
Other	3.7	0.0	9.7	8.5	4.5	1.9	0.0	0.5	0.0	1.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	--	700.0	12.5	-11.1	-12.5	57.1	-45.5	-16.7	-20.0
Retail	66.7	-10.0	11.1	-20.0	25.0	20.0	-16.7	-40.0	50.0
PDR	25.0	0.0	0.0	80.0	-22.2	28.6	-55.6	25.0	60.0
Hotel	--	--	-100.0	--	-50.0	100.0	100.0	-100.0	--
CIE	60.0	-62.5	233.3	0.0	-50.0	80.0	0.0	-55.6	0.0
Residential	46.0	-37.0	155.2	4.7	45.2	19.1	-38.8	-34.8	4.7
Other	-100.0	--	88.9	-47.1	-44.4	-100.0	--	-100.0	--
TOTAL	43.2	-19.8	114.0	1.0	29.4	19.6	-36.3	-35.9	10.2

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

Sources: San Francisco Planning Department; Department of Building Inspection

Total Construction Costs (Inflation-Adjusted 2018 \$ 000s)

Land Use Category	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$0	\$4,729	\$491,290	\$134,035	\$512,071	\$313,003	\$578,242	\$210,691	\$153,408	\$249,500
Retail	\$5,219	\$77,521	\$12,081	\$91,670	\$4,907	\$9,614	\$223,223	\$28,126	\$12,790	\$0
PDR	\$2,368	\$726	\$873	\$719	\$21,924	\$69,744	\$8,824	\$1,513	\$4,202	\$46,688
Hotel	\$0	\$0	\$31,604	\$0	\$58,436	\$0	\$105,907	\$201,795	\$0	\$25,250
CIE	\$27,632	\$76,616	\$15,886	\$13,765	\$32,076	\$3,911	\$37,016	\$884,359	\$26,691	\$56,514
Residential	\$284,877	\$673,085	\$767,225	\$1,729,860	\$1,801,859	\$2,041,014	\$2,426,789	\$3,141,774	\$1,255,561	\$1,402,243
Other	\$24	\$0	\$0	\$261,628	\$356	\$0	\$0	\$16,064	\$0	\$725
TOTAL	\$320,120	\$832,679	\$1,318,959	\$2,231,678	\$2,431,629	\$2,437,288	\$3,380,001	\$4,484,323	\$1,452,651	\$1,780,919

Annual Percentage Distribution

Land Use Category	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	0.0	0.6	37.2	6.0	21.1	12.8	17.1	4.7	10.6	14.0
Retail	1.6	9.3	0.9	4.1	0.2	0.4	6.6	0.6	0.9	0.0
PDR	0.7	0.1	0.1	0.0	0.9	2.9	0.3	0.0	0.3	2.6
Hotel	0.0	0.0	2.4	0.0	2.4	0.0	3.1	4.5	0.0	1.4
CIE	8.6	9.2	1.2	0.6	1.3	0.2	1.1	19.7	1.8	3.2
Residential	89.0	80.8	58.2	77.5	74.1	83.7	71.8	70.1	86.4	78.7
Other	0.0	0.0	0.0	11.7	0.0	0.0	0.0	0.4	0.0	0.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	--	10,288.0	-72.7	282.0	-38.9	84.7	-63.6	-27.2	62.6
Retail	1,385.4	-84.4	658.8	-94.6	95.9	2,221.8	-87.4	-54.5	-100.0
PDR	-69.3	20.2	-17.6	2,949.1	218.1	-87.3	-82.9	177.7	1,011.1
Hotel	--	--	-100.0	--	--	--	90.5	-100.0	--
CIE	177.3	-79.3	-13.3	133.0	-87.8	846.4	2,289.1	-97.0	111.7
Residential	136.3	14.0	125.5	4.2	13.3	18.9	29.5	-60.0	11.7
Other	--	--	--	-99.9	--	--	--	-100.0	--
TOTAL	160.1	58.4	69.2	9.0	0.2	38.7	32.7	-67.6	22.6

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

San Francisco Planning Department; Department of Building Inspection

This table presents the total cost of new construction associated with building permits filed by land use category over the last ten years. For consistency with previous C&I reports, costs are adjusted for inflation, with 2017 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Table 6.1.2.C
AVERAGE
CONSTRUCTION
COSTS FOR NEW
CONSTRUCTION BY
LAND USE CATEGORY,
2009–2018

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).

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

Land Use Category	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	--	\$4,729	\$61,411	\$14,893	\$64,009	\$44,715	\$52,567	\$35,115	\$30,682	\$62,375
Retail	\$870	\$7,752	\$1,342	\$9,167	\$613	\$961	\$18,602	\$2,813	\$2,132	\$0
PDR	\$592	\$145	\$175	\$144	\$2,436	\$9,963	\$980	\$378	\$840	\$5,836
Hotel	--	--	\$31,604	--	\$29,218	\$0	\$52,953	\$50,449	--	\$25,250
CIE	\$5,526	\$9,577	\$5,295	\$1,377	\$3,208	\$782	\$4,113	\$98,262	\$6,673	\$14,128
Residential	\$4,522	\$7,316	\$13,228	\$11,688	\$11,625	\$9,071	\$9,055	\$19,157	\$11,734	\$12,520
Other	\$8	--	\$0	\$0	\$40	\$0	--	\$16,064	--	\$363
TOTAL	\$3,952	\$7,178	\$14,182	\$11,214	\$12,098	\$9,374	\$10,868	\$22,648	\$11,438	\$12,721

Percentage Change

Land Use Category	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	--	1,198.5	-75.7	329.8	-30.1	17.6	-33.2	-12.6	103.3
Retail	791.2	-82.7	582.9	-93.3	56.7	1,834.9	-84.9	-24.2	-100.0
PDR	-75.5	20.2	-17.6	1,593.9	309.0	-90.2	-61.4	122.1	594.5
Hotel	--	--	--	--	-100.0	--	-4.7	--	--
CIE	73.3	-44.7	-74.0	133.0	-75.6	425.8	2,289.1	-93.2	111.7
Residential	61.8	80.8	-11.6	-0.5	-22.0	-0.2	111.6	-38.7	6.7
Other	--	--	--	--	-100.0	--	--	--	--
TOTAL	81.6	97.6	-20.9	7.9	-22.5	15.9	108.4	-49.5	11.2

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, 2009–2018**

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>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	2,907	2,967	3,398	3,704	4,402	4,458	4,970	4,682	4,270	5,140
Retail	2,197	1,955	2,168	2,432	2,329	2,199	2,210	2,188	2,009	2,345
PDR	232	200	243	226	274	299	362	323	391	382
Hotel	260	126	197	224	247	284	353	306	327	316
CIE	542	486	538	605	686	697	688	737	681	748
Residential	15,651	15,441	15,230	15,728	17,645	18,675	19,930	19,508	20,743	19,590
Other	218	212	271	330	462	580	353	488	346	432
TOTAL	22,007	21,387	22,045	23,249	26,045	27,192	28,866	28,232	28,767	28,953

Annual Percentage Distribution

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	13.2	13.9	15.4	15.9	16.9	16.4	17.2	16.6	14.8	17.8
Retail	10.0	9.1	9.8	10.5	8.9	8.1	7.7	7.8	7.0	8.1
PDR	1.1	0.9	1.1	1.0	1.1	1.1	1.3	1.1	1.4	1.3
Hotel	1.2	0.6	0.9	1.0	0.9	1.0	1.2	1.1	1.1	1.1
CIE	2.5	2.3	2.4	2.6	2.6	2.6	2.4	2.6	2.4	2.6
Residential	71.1	72.2	69.1	67.7	67.7	68.7	69.0	69.1	72.1	67.7
Other	1.0	1.0	1.2	1.4	1.8	2.1	1.2	1.7	1.2	1.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	2.1	14.5	9.0	18.8	1.3	11.5	-5.8	-8.8	20.4
Retail	-11.0	10.9	12.2	-4.2	-5.6	0.5	-1.0	-8.2	16.7
PDR	-13.8	21.5	-7.0	21.2	9.1	21.1	-10.8	21.1	-2.3
Hotel	-51.5	56.3	13.7	10.3	15.0	24.3	-13.3	6.9	-3.4
CIE	-10.3	10.7	12.5	13.4	1.6	-1.3	7.1	-7.6	9.8
Residential	-1.3	-1.4	3.3	12.2	5.8	6.7	-2.1	6.3	-5.6
Other	-2.8	27.8	21.8	40.0	25.5	-39.1	38.2	-29.1	24.9
TOTAL	-2.8	3.1	5.5	12.0	4.4	6.2	-2.2	1.9	0.6

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, 2009–2018**

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 2018 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 2018 \$ 000s)

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$357,298	\$464,272	\$532,929	\$755,024	\$948,341	\$905,129	\$1,126,749	\$832,855	\$979,362	\$1,240,447
Retail	\$110,470	\$138,117	\$175,337	\$261,742	\$220,437	\$154,095	\$244,246	\$201,008	\$203,132	\$274,310
PDR	\$26,471	\$14,755	\$19,610	\$20,481	\$17,281	\$31,475	\$56,461	\$87,649	\$58,335	\$48,784
Hotel	\$32,441	\$25,003	\$32,297	\$37,783	\$73,889	\$65,569	\$56,971	\$73,125	\$55,457	\$88,001
CIE	\$73,985	\$88,380	\$191,841	\$219,312	\$145,008	\$417,562	\$109,404	\$141,317	\$148,504	\$88,495
Residential	\$556,711	\$592,077	\$503,577	\$691,723	\$1,247,970	\$878,083	\$1,478,122	\$958,795	\$1,007,792	\$966,728
Other	\$5,464	\$3,655	\$12,025	\$190,248	\$74,556	\$38,592	\$90,356	\$117,312	\$68,648	\$54,688
TOTAL	\$1,162,840	\$1,326,259	\$1,467,616	\$2,176,313	\$2,727,482	\$2,490,505	\$3,162,309	\$2,412,061	\$2,521,230	\$2,761,453

Annual Percentage Distribution

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	30.7	35.0	36.3	34.7	34.8	36.3	35.6	34.5	38.8	44.9
Retail	9.5	10.4	11.9	12.0	8.1	6.2	7.7	8.3	8.1	9.9
PDR	2.3	1.1	1.3	0.9	0.6	1.3	1.8	3.6	2.3	1.8
Hotel	2.8	1.9	2.2	1.7	2.7	2.6	1.8	3.0	2.2	3.2
CIE	6.4	6.7	13.1	10.1	5.3	16.8	3.5	5.9	5.9	3.2
Residential	47.9	44.6	34.3	31.8	45.8	35.3	46.7	39.8	40.0	35.0
Other	0.5	0.3	0.8	8.7	2.7	1.5	2.9	4.9	2.7	2.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	29.9	14.8	41.7	25.6	-4.6	24.5	-26.1	17.6	26.7
Retail	25.0	26.9	49.3	-15.8	-30.1	58.5	-17.7	1.1	35.0
PDR	-44.3	32.9	4.4	-15.6	82.1	79.4	55.2	-33.4	-16.4
Hotel	-22.9	29.2	17.0	95.6	-11.3	-13.1	28.4	-24.2	58.7
CIE	19.5	117.1	14.3	-33.9	188.0	-73.8	29.2	5.1	-40.4
Residential	6.4	-14.9	37.4	80.4	-29.6	68.3	-35.1	5.1	-4.1
Other	-33.1	229.0	1482.1	-60.8	-48.2	134.1	29.8	-41.5	-20.3
TOTAL	14.1	10.7	48.3	25.3	-8.7	27.0	-23.7	4.5	9.5

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, 2009–2018**

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 2018 \$ 000s)

<i>Land Use Category</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Office	\$122.9	\$156.5	\$156.8	\$203.8	\$215.4	\$203.0	\$226.7	\$177.9	\$229.4	\$241.3
Retail	\$50.3	\$70.6	\$80.9	\$107.6	\$94.6	\$70.1	\$110.5	\$91.9	\$101.1	\$117.0
PDR	\$114.1	\$73.8	\$80.7	\$90.6	\$63.1	\$105.3	\$156.0	\$271.4	\$149.2	\$127.7
Hotel	\$124.8	\$198.4	\$163.9	\$168.7	\$299.1	\$230.9	\$161.4	\$239.0	\$169.6	\$278.5
CIE	\$136.5	\$181.9	\$356.6	\$362.5	\$211.4	\$599.1	\$159.0	\$191.7	\$218.1	\$118.3
Residential	\$35.6	\$38.3	\$33.1	\$44.0	\$70.7	\$47.0	\$74.2	\$49.1	\$48.6	\$49.3
Other	\$25.1	\$17.2	\$44.4	\$576.5	\$161.4	\$66.5	\$256.0	\$240.4	\$198.4	\$126.6
TOTAL	\$52.8	\$62.0	\$66.6	\$93.6	\$104.7	\$91.6	\$109.6	\$85.4	\$87.6	\$95.4

Percentage Change

<i>Land Use Category</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Office	27.3	0.2	30.0	5.7	-5.8	11.7	-21.5	28.9	5.2
Retail	40.5	14.5	33.1	-12.1	-26.0	57.7	-16.9	10.1	15.7
PDR	-35.3	9.4	12.3	-30.4	66.9	48.2	74.0	-45.0	-14.4
Hotel	59.0	-17.4	2.9	77.4	-22.8	-30.1	48.1	-29.0	64.2
CIE	33.2	96.1	1.7	-41.7	183.4	-73.5	20.6	13.7	-45.7
Residential	7.8	-13.8	33.0	60.8	-33.5	57.7	-33.7	-1.1	1.6
Other	-31.2	157.4	1199.2	-72.0	-58.8	284.7	-6.1	-17.5	-36.2
TOTAL	17.4	7.4	40.6	11.9	-12.5	19.6	-22.0	2.6	8.8

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, 2009–2018

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&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	554	572	599	663	691	680	854	752	869	855
Civic Center	751	710	781	793	1,062	1,157	1,148	1,173	1,085	1,012
Financial	2,688	2,600	2,994	3,443	3,668	3,635	4,214	4,065	3,757	4,185
Mission	1,781	1,894	1,821	1,880	2,068	2,233	2,326	2,314	2,392	2,184
North Beach	713	649	730	709	918	872	963	920	859	918
North Central	3,202	2,981	2,916	3,221	3,493	3,675	3,984	3,972	4,249	3,730
Northwest	1,897	1,904	1,936	1,953	2,118	2,372	2,545	2,474	2,698	2,509
South of Market	2,072	1,969	2,131	2,481	2,913	3,056	3,019	2,907	2,792	2,719
Southwest	7,582	7,550	7,368	7,656	8,377	8,541	9,181	8,697	9,190	8,632
Van Ness	987	1,064	1,108	1,254	1,396	1,534	1,542	1,457	1,621	1,597
Unclassified	232	185	221	243	298	416	34	21	22	1,424
TOTAL	22,459	22,078	22,605	24,296	27,002	28,171	29,810	28,752	29,534	29,765

Annual Percentage Distribution

<i>C&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	2.5	2.6	2.6	2.7	2.6	2.4	2.9	2.6	2.9	2.9
Civic Center	3.3	3.2	3.5	3.3	3.9	4.1	3.9	4.1	3.7	3.4
Financial	12.0	11.8	13.2	14.2	13.6	12.9	14.1	14.1	12.7	14.1
Mission	7.9	8.6	8.1	7.7	7.7	7.9	7.8	8.0	8.1	7.3
North Beach	3.2	2.9	3.2	2.9	3.4	3.1	3.2	3.2	2.9	3.1
North Central	14.3	13.5	12.9	13.3	12.9	13.0	13.4	13.8	14.4	12.5
Northwest	8.4	8.6	8.6	8.0	7.8	8.4	8.5	8.6	9.1	8.4
South of Market	9.2	8.9	9.4	10.2	10.8	10.8	10.1	10.1	9.5	9.1
Southwest	33.8	34.2	32.6	31.5	31.0	30.3	30.8	30.2	31.1	29.0
Van Ness	4.4	4.8	4.9	5.2	5.2	5.4	5.2	5.1	5.5	5.4
Unclassified	1.0	0.8	1.0	1.0	1.1	1.5	0.1	0.1	0.1	4.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>C&I District</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Bayview	3.2	4.7	10.7	4.2	-1.6	25.6	-11.9	15.6	-1.6
Civic Center	-5.5	10.0	1.5	33.9	8.9	-0.8	2.2	-7.5	-6.7
Financial	-3.3	15.2	15.0	6.5	-0.9	15.9	-3.5	-7.6	11.4
Mission	6.3	-3.9	3.2	10.0	8.0	4.2	-0.5	3.4	-8.7
North Beach	-9.0	12.5	-2.9	29.5	-5.0	10.4	-4.5	-6.6	6.9
North Central	-6.9	-2.2	10.5	8.4	5.2	8.4	-0.3	7.0	-12.2
Northwest	0.4	1.7	0.9	8.4	12.0	7.3	-2.8	9.1	-7.0
South of Market	-5.0	8.2	16.4	17.4	4.9	-1.2	-3.7	-4.0	-2.6
Southwest	-0.4	-2.4	3.9	9.4	2.0	7.5	-5.3	5.7	-6.1
Van Ness	7.8	4.1	13.2	11.3	9.9	0.5	-5.5	11.3	-1.5
Unclassified	-20.3	19.5	10.0	22.6	39.6	-91.8	-38.2	4.8	6372.7
TOTAL	-1.7	2.4	7.5	11.1	4.3	5.8	-3.5	2.7	0.8

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, 2009–2018**

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 2018 \$ 000s)

C&I District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	\$166,770	\$52,721	\$40,222	\$84,976	\$205,755	\$364,647	\$236,961	\$294,104	\$287,754	\$212,227
Civic Center	\$68,708	\$182,050	\$100,709	\$773,472	\$395,524	\$357,772	\$285,069	\$581,208	\$417,172	\$169,004
Financial	\$312,190	\$626,210	\$545,608	\$1,280,302	\$1,433,898	\$1,227,121	\$1,677,020	\$1,216,855	\$736,745	\$939,300
Mission	\$60,737	\$80,521	\$86,387	\$82,549	\$183,914	\$205,619	\$372,544	\$345,328	\$278,521	\$251,359
North Beach	\$45,330	\$39,731	\$46,950	\$34,126	\$73,976	\$77,275	\$152,166	\$67,032	\$57,657	\$59,740
North Central	\$130,286	\$183,886	\$153,830	\$393,647	\$308,739	\$219,771	\$438,346	\$268,491	\$285,954	\$237,714
Northwest	\$70,269	\$87,364	\$76,230	\$100,726	\$112,560	\$138,988	\$138,698	\$212,304	\$184,402	\$130,572
South of Market	\$240,403	\$519,238	\$1,235,054	\$1,161,347	\$1,733,484	\$1,757,584	\$1,951,420	\$2,581,744	\$942,646	\$1,154,297
Southwest	\$333,554	\$336,293	\$260,246	\$367,432	\$501,284	\$477,017	\$1,162,527	\$918,436	\$667,530	\$565,294
Van Ness	\$59,586	\$57,070	\$247,033	\$158,653	\$244,617	\$124,211	\$147,097	\$408,121	\$131,089	\$188,416
Unclassified	\$140	\$470	\$1,057	\$109	\$1,668	\$332	\$4,710	\$17,106	\$6,888	\$687,221
TOTAL	\$1,487,973	\$2,165,554	\$2,793,326	\$4,437,339	\$5,195,419	\$4,950,337	\$6,566,558	\$6,910,729	\$3,996,358	\$4,595,144

Annual Percentage Distribution

C&I District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	11.2	2.4	1.4	1.9	4.0	7.4	3.6	4.3	7.2	4.6
Civic Center	4.6	8.4	3.6	17.4	7.6	7.2	4.3	8.4	10.4	3.7
Financial	21.0	28.9	19.5	28.9	27.6	24.8	25.5	17.6	18.4	20.4
Mission	4.1	3.7	3.1	1.9	3.5	4.2	5.7	5.0	7.0	5.5
North Beach	3.0	1.8	1.7	0.8	1.4	1.6	2.3	1.0	1.4	1.3
North Central	8.8	8.5	5.5	8.9	5.9	4.4	6.7	3.9	7.2	5.2
Northwest	4.7	4.0	2.7	2.3	2.2	2.8	2.1	3.1	4.6	2.8
South of Market	16.2	24.0	44.2	26.2	33.4	35.5	29.7	37.4	23.6	25.1
Southwest	22.4	15.5	9.3	8.3	9.6	9.6	17.7	13.3	16.7	12.3
Van Ness	4.0	2.6	8.8	3.6	4.7	2.5	2.2	5.9	3.3	4.1
Unclassified	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.2	15.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Bayview	-68.4	-23.7	111.3	142.1	77.2	-35.0	24.1	-2.2	-26.2
Civic Center	165.0	-44.7	668.0	-48.9	-9.5	-20.3	103.9	-28.2	-59.5
Financial	100.6	-12.9	134.7	12.0	-14.4	36.7	-27.4	-39.5	27.5
Mission	32.6	7.3	-4.4	122.8	11.8	81.2	-7.3	-19.3	-9.8
North Beach	-12.4	18.2	-27.3	116.8	4.5	96.9	-55.9	-14.0	3.6
North Central	41.1	-16.3	155.9	-21.6	-28.8	99.5	-38.7	6.5	-16.9
Northwest	24.3	-12.7	32.1	11.7	23.5	-0.2	53.1	-13.1	-29.2
South of Market	116.0	137.9	-6.0	49.3	1.4	11.0	32.3	-63.5	22.5
Southwest	0.8	-22.6	41.2	36.4	-4.8	143.7	-21.0	-27.3	-15.3
Van Ness	-4.2	332.9	-35.8	54.2	-49.2	18.4	177.5	-67.9	43.7
Unclassified	235.7	124.9	-89.7	1,430.3	-80.1	1,318.7	263.2	-59.7	9,877.1
TOTAL	45.5	29.0	58.9	17.1	-4.7	32.6	5.2	-42.2	15.0

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, 2009–2018**

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 2018 \$ 000s)

<i>C&I District</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
Bayview	\$301.0	\$92.2	\$67.1	\$128.2	\$297.8	\$536.2	\$277.5	\$391.1	\$331.1	\$248.2
Civic Center	\$91.5	\$256.4	\$128.9	\$975.4	\$372.4	\$309.2	\$248.3	\$495.5	\$384.5	\$167.0
Financial	\$116.1	\$240.9	\$182.2	\$371.9	\$390.9	\$337.6	\$398.0	\$299.3	\$196.1	\$224.4
Mission	\$34.1	\$42.5	\$47.4	\$43.9	\$88.9	\$92.1	\$160.2	\$149.2	\$116.4	\$115.1
North Beach	\$63.6	\$61.2	\$64.3	\$48.1	\$80.6	\$88.6	\$158.0	\$72.9	\$67.1	\$65.1
North Central	\$40.7	\$61.7	\$52.8	\$122.2	\$88.4	\$59.8	\$110.0	\$67.6	\$67.3	\$63.7
Northwest	\$37.0	\$45.9	\$39.4	\$51.6	\$53.1	\$58.6	\$54.5	\$85.8	\$68.3	\$52.0
South of Market	\$116.0	\$263.7	\$579.6	\$468.1	\$595.1	\$575.1	\$646.4	\$888.1	\$337.6	\$424.5
Southwest	\$44.0	\$44.5	\$35.3	\$48.0	\$59.8	\$55.9	\$126.6	\$105.6	\$72.6	\$65.5
Van Ness	\$60.4	\$53.6	\$223.0	\$126.5	\$175.2	\$81.0	\$95.4	\$280.1	\$80.9	\$118.0
Unclassified	\$0.6	\$2.5	\$4.8	\$0.4	\$5.6	\$0.8	\$138.5	\$814.6	\$313.1	\$482.6
Citywide Average	\$66.3	\$98.1	\$123.6	\$182.6	\$192.4	\$175.7	\$220.3	\$240.4	\$135.3	\$154.4

Percentage Change

<i>C&I District</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>	<i>2017-18</i>
Bayview	-69.4	-27.1	90.9	132.3	80.1	-48.3	40.9	-15.3	-25.0
Civic Center	180.3	-49.7	656.4	-61.8	-17.0	-19.7	99.5	-22.4	-56.6
Financial	107.4	-24.3	104.1	5.1	-13.6	17.9	-24.8	-34.5	14.5
Mission	24.7	11.6	-7.4	102.5	3.5	73.9	-6.8	-22.0	-1.2
North Beach	-3.7	5.1	-25.2	67.4	10.0	78.3	-53.9	-7.9	-3.0
North Central	51.6	-14.5	131.7	-27.7	-32.3	84.0	-38.6	-0.4	-5.3
Northwest	23.9	-14.2	31.0	3.0	10.3	-7.0	57.5	-20.4	-23.9
South of Market	127.3	119.8	-19.2	27.1	-3.4	12.4	37.4	-62.0	25.7
Southwest	1.2	-20.7	35.9	24.7	-6.7	126.7	-16.6	-31.2	-9.8
Van Ness	-11.2	315.7	-43.3	38.5	-53.8	17.8	193.6	-71.1	45.9
Unclassified	321.0	88.3	-90.6	1,147.8	-85.7	17,257.9	488.0	-61.6	54.1
Citywide Average	48.0	26.0	47.8	5.4	-8.7	25.4	9.1	-43.7	14.1

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.A**BUILDING PERMITS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2009–2019**

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&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	15	9	3	13	20	18	78	26	17	10
Civic Center	3	9	3	6	11	3	6	9	6	4
Financial	1	3	4	10	9	7	7	10	3	1
Mission	4	4	4	8	15	29	21	20	14	12
North Beach	0	0	1	1	2	1	5	8	1	3
North Central	2	11	7	17	15	12	25	12	9	11
Northwest	3	7	3	5	10	14	5	7	6	8
South of Market	9	8	19	21	34	45	33	33	24	27
Southwest	39	62	19	77	53	81	129	47	42	43
Van Ness	4	3	3	6	2	6	2	11	3	7
Unclassified	1	23	27	34	30	44	0	15	2	14
TOTAL	81	139	93	198	201	260	311	198	127	140

Annual Percentage Distribution

<i>C&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	18.5	6.5	3.2	6.6	10.0	6.9	25.1	13.1	13.4	7.1
Civic Center	3.7	6.5	3.2	3.0	5.5	1.2	1.9	4.5	4.7	2.9
Financial	1.2	2.2	4.3	5.1	4.5	2.7	2.3	5.1	2.4	0.7
Mission	4.9	2.9	4.3	4.0	7.5	11.2	6.8	10.1	11.0	8.6
North Beach	0.0	0.0	1.1	0.5	1.0	0.4	1.6	4.0	0.8	2.1
North Central	2.5	7.9	7.5	8.6	7.5	4.6	8.0	6.1	7.1	7.9
Northwest	3.7	5.0	3.2	2.5	5.0	5.4	1.6	3.5	4.7	5.7
South of Market	11.1	5.8	20.4	10.6	16.9	17.3	10.6	16.7	18.9	19.3
Southwest	48.1	44.6	20.4	38.9	26.4	31.2	41.5	23.7	33.1	30.7
Van Ness	4.9	2.2	3.2	3.0	1.0	2.3	0.6	5.6	2.4	5.0
Unclassified	1.2	16.5	29.0	17.2	14.9	16.9	0.0	7.6	1.6	10.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>C&I District</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Bayview	-40.0	-66.7	333.3	53.8	-10.0	333.3	-66.7	-34.6	-41.2
Civic Center	200.0	-66.7	100.0	83.3	-72.7	100.0	50.0	-33.3	-33.3
Financial	200.0	33.3	150.0	-10.0	-22.2	0.0	42.9	-70.0	-66.7
Mission	0.0	0.0	100.0	87.5	93.3	-27.6	-4.8	-30.0	-14.3
North Beach	--	--	0.0	100.0	-50.0	400.0	60.0	-87.5	200.0
North Central	450.0	-36.4	142.9	-11.8	-20.0	108.3	-52.0	-25.0	22.2
Northwest	133.3	-57.1	66.7	100.0	40.0	-64.3	40.0	-14.3	33.3
South of Market	-11.1	137.5	10.5	61.9	32.4	-26.7	0.0	-27.3	12.5
Southwest	59.0	-69.4	305.3	-31.2	52.8	59.3	-63.6	-10.6	2.4
Van Ness	-25.0	0.0	100.0	-66.7	200.0	-66.7	450.0	-72.7	133.3
Unclassified	2,200.0	17.4	25.9	-11.8	46.7	-100.0	--	-86.7	600.0
TOTAL	71.6	-33.1	112.9	1.5	29.4	19.6	-36.3	-35.9	10.2

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2009–2018

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 2018 \$ 000s)

C&I District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	\$128,309	\$27,157	\$928	\$58,904	\$167,611	\$265,991	\$90,004	\$222,539	\$258,267	\$170,479
Civic Center	\$13,735	\$110,534	\$30,941	\$343,444	\$248,333	\$9,701	\$106,095	\$475,357	\$259,662	\$88,300
Financial	\$22,387	\$229,029	\$179,310	\$800,431	\$778,837	\$718,709	\$788,684	\$589,311	\$56,222	\$84,450
Mission	\$4,297	\$7,427	\$5,561	\$6,853	\$63,398	\$87,716	\$232,113	\$182,164	\$131,483	\$32,591
North Beach	\$0	\$0	\$8,610	\$443	\$11,641	\$740	\$15,817	\$13,697	\$104	\$1,750
North Central	\$2,610	\$49,329	\$25,948	\$205,090	\$24,206	\$28,288	\$78,488	\$30,042	\$26,882	\$27,566
Northwest	\$2,925	\$5,261	\$3,990	\$5,184	\$9,959	\$18,224	\$5,217	\$88,453	\$41,662	\$7,375
South of Market	\$10,311	\$287,917	\$856,758	\$652,255	\$963,515	\$964,046	\$1,331,685	\$2,123,756	\$394,206	\$770,410
Southwest	\$117,589	\$109,545	\$16,101	\$95,255	\$117,632	\$98,946	\$714,575	\$431,077	\$254,442	\$220,986
Van Ness	\$17,957	\$6,478	\$190,813	\$63,818	\$46,497	\$24,927	\$17,323	\$311,327	\$24,506	\$40,180
Unclassified	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$16,600	\$5,214	\$368,707
TOTAL	\$320,120	\$832,677	\$1,318,960	\$2,231,677	\$2,431,629	\$2,217,288	\$3,380,001	\$4,484,323	\$1,452,650	\$1,812,794

Annual Percentage Distribution

C&I District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	40.1	3.3	0.1	2.6	6.9	12.0	2.7	5.0	17.8	9.4
Civic Center	4.3	13.3	2.3	15.4	10.2	0.4	3.1	10.6	17.9	4.9
Financial	7.0	27.5	13.6	35.9	32.0	32.4	23.3	13.1	3.9	4.7
Mission	1.3	0.9	0.4	0.3	2.6	4.0	6.9	4.1	9.1	1.8
North Beach	0.0	0.0	0.7	0.0	0.5	0.0	0.5	0.3	0.0	0.1
North Central	0.8	5.9	2.0	9.2	1.0	1.3	2.3	0.7	1.9	1.5
Northwest	0.9	0.6	0.3	0.2	0.4	0.8	0.2	2.0	2.9	0.4
South of Market	3.2	34.6	65.0	29.2	39.6	43.5	39.4	47.4	27.1	42.5
Southwest	36.7	13.2	1.2	4.3	4.8	4.5	21.1	9.6	17.5	12.2
Van Ness	5.6	0.8	14.5	2.9	1.9	1.1	0.5	6.9	1.7	2.2
Unclassified	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	20.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Bayview	-78.8	-96.6	6,247.4	184.5	58.7	-66.2	147.3	16.1	-34.0
Civic Center	704.8	-72.0	1,010.0	-27.7	-96.1	993.7	348.0	-45.4	-66.0
Financial	923.0	-21.7	346.4	-2.7	-7.7	9.7	-25.3	-90.5	50.2
Mission	72.8	-25.1	23.2	825.1	38.4	164.6	-21.5	-27.8	-75.2
North Beach	--	--	-94.9	2,527.8	-93.6	2,037.4	-13.4	-99.2	1,582.7
North Central	1,790.0	-47.4	690.4	-88.2	16.9	177.5	-61.7	-10.5	2.5
Northwest	79.9	-24.2	29.9	92.1	83.0	-71.4	1,595.5	-52.9	-82.3
South of Market	2,692.3	197.6	-23.9	47.7	0.1	38.1	59.5	-81.4	95.4
Southwest	-6.8	-85.3	491.6	23.5	-15.9	622.2	-39.7	-41.0	-13.1
Van Ness	-63.9	2,845.6	-66.6	-27.1	-46.4	-30.5	1,697.2	-92.1	64.0
Unclassified	--	--	--	--	--	--	--	-68.6	6,971.5
TOTAL	160.1	58.4	69.2	9.0	-8.8	52.4	32.7	-67.6	24.8

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.C**AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2009–2018**

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 2018 \$ 000s)

<i>C&I District</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>
Bayview	\$8,554	\$3,017	\$309	\$4,531	\$8,381	\$14,777	\$1,154	\$8,559	\$15,192	\$17,048
Civic Center	\$4,578	\$12,282	\$10,314	\$57,241	\$22,576	\$3,234	\$17,683	\$52,817	\$43,277	\$22,075
Financial	\$22,387	\$76,343	\$44,828	\$80,043	\$86,537	\$102,673	\$112,669	\$58,931	\$18,741	\$84,450
Mission	\$1,074	\$1,857	\$1,390	\$857	\$4,227	\$3,025	\$11,053	\$9,108	\$9,392	\$2,716
North Beach	--	--	\$8,610	\$443	\$5,821	\$740	\$3,163	\$1,712	\$104	\$583
North Central	\$1,305	\$4,484	\$3,707	\$12,064	\$1,614	\$2,357	\$3,140	\$2,504	\$2,987	\$2,506
Northwest	\$975	\$752	\$1,330	\$1,037	\$996	\$1,302	\$1,043	\$12,636	\$6,944	\$922
South of Market	\$1,146	\$35,990	\$45,093	\$31,060	\$28,339	\$21,423	\$40,354	\$64,356	\$16,425	\$28,534
Southwest	\$3,015	\$1,767	\$847	\$1,237	\$2,219	\$1,222	\$5,539	\$9,172	\$6,058	\$5,139
Van Ness	\$4,489	\$2,159	\$63,604	\$10,636	\$23,249	\$4,155	\$8,662	\$28,302	\$8,169	\$5,740
Unclassified	\$0	\$0	\$0	\$0	\$0	\$0	--	\$1,107	\$2,607	\$26,336
Citywide Average	\$3,952	\$5,990	\$14,182	\$11,271	\$12,098	\$8,528	\$10,868	\$22,648	\$11,438	\$12,949

Percentage Change

<i>C&I District</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>	<i>2017-18</i>
Bayview	-64.7	-89.7	1,364.8	85.0	76.3	-92.2	641.8	77.5	12.2
Civic Center	168.3	-16.0	455.0	-60.6	-85.7	446.8	198.7	-18.1	-49.0
Financial	241.0	-41.3	78.6	8.1	18.6	9.7	-47.7	-68.2	350.6
Mission	72.8	-25.1	-38.4	393.4	-28.4	265.4	-17.6	3.1	-71.1
North Beach	--	--	-94.9	1,213.9	-87.3	327.5	-45.9	-93.9	460.9
North Central	243.6	-17.3	225.5	-86.6	46.1	33.2	-20.3	19.3	-16.1
Northwest	-22.9	77.0	-22.0	-3.9	30.7	-19.8	1,111.1	-45.0	-86.7
South of Market	3,041.4	25.3	-31.1	-8.8	-24.4	88.4	59.5	-74.5	73.7
Southwest	-41.4	-52.0	46.0	79.4	-45.0	353.5	65.6	-33.9	-15.2
Van Ness	-51.9	2,845.6	-83.3	118.6	-82.1	108.5	226.8	-71.1	-29.7
Unclassified	--	--	--	--	--	--	--	135.6	910.2
Citywide Average	51.6	136.7	-20.5	7.3	-29.5	27.4	108.4	-49.5	13.2

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.3.A**BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2009–2018**

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&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	524	544	572	635	646	647	762	701	826	824
Civic Center	723	674	734	736	1,003	1,100	1,072	1,086	1,023	966
Financial	2,608	2,508	2,882	3,213	3,548	3,481	4,068	3,909	3,642	4,045
Mission	1,753	1,864	1,785	1,839	2,019	2,178	2,279	2,257	2,337	2,144
North Beach	689	626	705	673	836	822	936	867	835	882
North Central	3,165	2,943	2,870	3,116	3,401	3,614	3,917	3,898	4,179	3,655
Northwest	1,874	1,877	1,916	1,904	2,045	2,326	2,508	2,449	2,655	2,483
South of Market	2,004	1,841	2,019	2,298	2,722	2,859	2,850	2,725	2,628	2,560
Southwest	7,476	7,431	7,282	7,435	8,216	8,335	8,944	8,569	9,051	8,504
Van Ness	956	1,048	1,085	1,208	1,356	1,495	1,497	1,429	1,574	1,551
Unclassified	227	156	187	191	253	335	33	19	17	1,339
TOTAL	21,999	21,512	22,037	23,248	26,045	27,192	28,866	27,909	28,767	28,953

Annual Percentage Distribution

<i>C&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	2.4	2.5	2.6	2.7	2.5	2.4	2.6	2.5	2.9	2.8
Civic Center	3.3	3.1	3.3	3.2	3.9	4.0	3.7	3.9	3.6	3.3
Financial	11.9	11.7	13.1	13.8	13.6	12.8	14.1	14.0	12.7	14.0
Mission	8.0	8.7	8.1	7.9	7.8	8.0	7.9	8.1	8.1	7.4
North Beach	3.1	2.9	3.2	2.9	3.2	3.0	3.2	3.1	2.9	3.0
North Central	14.4	13.7	13.0	13.4	13.1	13.3	13.6	14.0	14.5	12.6
Northwest	8.5	8.7	8.7	8.2	7.9	8.6	8.7	8.8	9.2	8.6
South of Market	9.1	8.6	9.2	9.9	10.5	10.5	9.9	9.8	9.1	8.8
Southwest	34.0	34.5	33.0	32.0	31.5	30.7	31.0	30.7	31.5	29.4
Van Ness	4.3	4.9	4.9	5.2	5.2	5.5	5.2	5.1	5.5	5.4
Unclassified	1.0	0.7	0.8	0.8	1.0	1.2	0.1	0.1	0.1	4.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>C&I District</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Bayview	3.8	5.1	11.0	1.7	0.2	17.8	-8.0	17.8	-0.2
Civic Center	-6.8	8.9	0.3	36.3	9.7	-2.5	1.3	-5.8	-5.6
Financial	-3.8	14.9	11.5	10.4	-1.9	16.9	-3.9	-6.8	11.1
Mission	6.3	-4.2	3.0	9.8	7.9	4.6	-1.0	3.5	-8.3
North Beach	-9.1	12.6	-4.5	24.2	-1.7	13.9	-7.4	-3.7	5.6
North Central	-7.0	-2.5	8.6	9.1	6.3	8.4	-0.5	7.2	-12.5
Northwest	0.2	2.1	-0.6	7.4	13.7	7.8	-2.4	8.4	-6.5
South of Market	-8.1	9.7	13.8	18.5	5.0	-0.3	-4.4	-3.6	-2.6
Southwest	-0.6	-2.0	2.1	10.5	1.4	7.3	-4.2	5.6	-6.0
Van Ness	9.6	3.5	11.3	12.3	10.3	0.1	-4.5	10.1	-1.5
Unclassified	-31.3	19.9	2.1	32.5	32.4	-90.1	-42.4	-10.5	7776.5
TOTAL	-2.2	2.4	5.5	12.0	4.4	6.2	-3.3	3.1	0.6

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, 2009–2018**

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 2018\$ 000s)

<i>C&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	\$37,891	\$22,235	\$39,103	\$24,599	\$36,274	\$97,795	\$143,236	\$70,989	\$29,354	\$41,661
Civic Center	\$54,811	\$71,347	\$69,414	\$429,618	\$146,971	\$127,800	\$178,732	\$105,097	\$156,197	\$80,444
Financial	\$288,863	\$396,643	\$365,799	\$478,253	\$645,408	\$507,750	\$871,734	\$619,383	\$678,952	\$851,766
Mission	\$56,265	\$73,010	\$80,662	\$75,392	\$119,478	\$117,848	\$140,285	\$162,924	\$144,826	\$218,679
North Beach	\$45,233	\$39,604	\$38,146	\$33,562	\$59,799	\$76,295	\$136,210	\$53,184	\$57,451	\$57,903
North Central	\$127,414	\$134,435	\$127,748	\$187,309	\$283,648	\$191,203	\$359,548	\$238,304	\$258,311	\$209,900
Northwest	\$67,245	\$81,992	\$72,190	\$95,435	\$102,019	\$120,661	\$133,302	\$123,774	\$142,590	\$118,143
South of Market	\$229,719	\$229,856	\$373,488	\$506,091	\$754,459	\$792,773	\$618,310	\$457,262	\$534,043	\$378,163
Southwest	\$213,790	\$226,105	\$243,846	\$251,964	\$380,737	\$360,836	\$446,780	\$483,927	\$411,855	\$341,134
Van Ness	\$41,467	\$50,563	\$56,164	\$93,981	\$197,022	\$97,211	\$129,469	\$96,711	\$106,398	\$147,473
Unclassified	\$140	\$470	\$1,056	\$109	\$1,668	\$332	\$4,704	\$506	\$1,253	\$316,187
TOTAL	\$1,162,838	\$1,326,260	\$1,467,616	\$2,176,313	\$2,727,483	\$2,490,504	\$3,162,310	\$2,412,061	\$2,521,230	\$2,761,453

Annual Percentage Distribution

<i>C&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	3.3	1.7	2.7	1.1	1.3	3.9	4.5	2.9	1.2	1.5
Civic Center	4.7	5.4	4.7	19.7	5.4	5.1	5.7	4.4	6.2	2.9
Financial	24.8	29.9	24.9	22.0	23.7	20.4	27.6	25.7	26.9	30.8
Mission	4.8	5.5	5.5	3.5	4.4	4.7	4.4	6.8	5.7	7.9
North Beach	3.9	3.0	2.6	1.5	2.2	3.1	4.3	2.2	2.3	2.1
North Central	11.0	10.1	8.7	8.6	10.4	7.7	11.4	9.9	10.2	7.6
Northwest	5.8	6.2	4.9	4.4	3.7	4.8	4.2	5.1	5.7	4.3
South of Market	19.8	17.3	25.4	23.3	27.7	31.8	19.6	19.0	21.2	13.7
Southwest	18.4	17.0	16.6	11.6	14.0	14.5	14.1	20.1	16.3	12.4
Van Ness	3.6	3.8	3.8	4.3	7.2	3.9	4.1	4.0	4.2	5.3
Unclassified	0.0	0.0	0.1	0.0	0.1	0.0	0.1	0.0	0.0	11.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

<i>C&I District</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Bayview	-41.3	75.9	-37.1	47.5	169.6	46.5	-50.4	-58.6	41.9
Civic Center	30.2	-2.7	518.9	-65.8	-13.0	39.9	-41.2	48.6	-48.5
Financial	37.3	-7.8	30.7	35.0	-21.3	71.7	-28.9	9.6	25.5
Mission	29.8	10.5	-6.5	58.5	-1.4	19.0	16.1	-11.1	51.0
North Beach	-12.4	-3.7	-12.0	78.2	27.6	78.5	-61.0	8.0	0.8
North Central	5.5	-5.0	46.6	51.4	-32.6	88.0	-33.7	8.4	-18.7
Northwest	21.9	-12.0	32.2	6.9	18.3	10.5	-7.1	15.2	-17.1
South of Market	0.1	62.5	35.5	49.1	5.1	-22.0	-26.0	16.8	-29.2
Southwest	5.8	7.8	3.3	51.1	-5.2	23.8	8.3	-14.9	-17.2
Van Ness	21.9	11.1	67.3	109.6	-50.7	33.2	-25.3	10.0	38.6
Unclassified	235.7	124.7	-89.7	1430.3	-80.1	1316.9	-89.2	147.6	25134.4
TOTAL	14.1	10.7	48.3	25.3	-8.7	27.0	-23.7	4.5	9.5

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.3.C**AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2009–2018**

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 2018 \$ 000s)

<i>C&I District</i>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Bayview	\$72.3	\$40.9	\$68.4	\$38.7	\$56.2	\$151.2	\$188.0	\$101.3	\$35.5	\$50.6
Civic Center	\$75.8	\$105.9	\$94.6	\$583.7	\$146.5	\$116.2	\$166.7	\$96.8	\$152.7	\$83.3
Financial	\$110.8	\$158.2	\$126.9	\$148.8	\$181.9	\$145.9	\$214.3	\$158.5	\$186.4	\$210.6
Mission	\$32.1	\$39.2	\$45.2	\$41.0	\$59.2	\$54.1	\$61.6	\$72.2	\$62.0	\$102.0
North Beach	\$65.7	\$63.3	\$54.1	\$49.9	\$71.5	\$92.8	\$145.5	\$61.3	\$68.8	\$65.6
North Central	\$40.3	\$45.7	\$44.5	\$60.1	\$83.4	\$52.9	\$91.8	\$61.1	\$61.8	\$57.4
Northwest	\$35.9	\$43.7	\$37.7	\$50.1	\$49.9	\$51.9	\$53.2	\$50.5	\$53.7	\$47.6
South of Market	\$114.6	\$124.9	\$185.0	\$220.2	\$277.2	\$277.3	\$217.0	\$167.8	\$203.2	\$147.7
Southwest	\$28.6	\$30.4	\$33.5	\$33.9	\$46.3	\$43.3	\$50.0	\$56.5	\$45.5	\$40.1
Van Ness	\$43.4	\$48.2	\$51.8	\$77.8	\$145.3	\$65.0	\$86.5	\$67.7	\$67.6	\$95.1
Unclassified	\$0.6	\$3.0	\$5.6	\$0.6	\$6.6	\$1.0	\$142.5	\$26.6	\$73.7	\$236.1
Citywide Average	\$52.9	\$61.7	\$66.6	\$93.6	\$104.7	\$91.6	\$109.6	\$86.4	\$87.6	\$95.4

Percentage Change

<i>C&I District</i>	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Bayview	-43.5	67.3	-43.3	45.0	169.2	24.4	-46.1	-64.9	42.3
Civic Center	39.6	-10.7	517.2	-74.9	-20.7	43.5	-42.0	57.8	-45.5
Financial	42.8	-19.7	17.3	22.2	-19.8	46.9	-26.1	17.7	13.0
Mission	22.0	15.4	-9.3	44.3	-8.6	13.8	17.3	-14.2	64.6
North Beach	-3.6	-14.5	-7.8	43.4	29.8	56.8	-57.8	12.2	-4.6
North Central	13.5	-2.6	35.0	38.7	-36.6	73.5	-33.4	1.1	-7.1
Northwest	21.7	-13.7	33.0	-0.5	4.0	2.5	-4.9	6.3	-11.4
South of Market	8.9	48.2	19.1	25.9	0.0	-21.8	-22.7	21.1	-27.3
Southwest	6.4	10.1	1.2	36.7	-6.6	15.4	13.1	-19.4	-11.8
Van Ness	11.2	7.3	50.3	86.8	-55.2	33.0	-21.7	-0.1	40.7
Unclassified	388.5	87.4	-89.9	1055.3	-85.0	14283.4	-81.3	176.8	220.4
Citywide Average	16.6	8.0	40.6	11.9	-12.5	19.6	-21.1	1.4	8.8

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.A
PERMIT APPLICATIONS
BY COMMERCE &
INDUSTRY DISTRICT AND
LAND USE CATEGORY,
2018

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

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	36	62	97	3	25	588	44	855
Civic Center	246	141	4	77	46	447	51	1,012
Financial	3,107	405	7	67	54	380	165	4,185
Mission	93	200	37	17	55	1,709	73	2,184
North Beach	53	125	4	25	17	653	41	918
North Central	47	205	2	24	124	3,213	115	3,730
Northwest	37	137	4	0	61	2,217	53	2,509
South of Market	743	409	171	61	97	1,041	197	2,719
Southwest	113	340	28	6	178	7,760	207	8,632
Van Ness	75	161	10	17	43	1,231	60	1,597
Unclassified	594	169	26	20	52	463	100	1,424
TOTAL	5,144	2,354	390	317	752	19,702	1,106	29,765

Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	0.7	2.6	24.9	0.9	3.3	3.0	4.0	2.9
Civic Center	4.8	6.0	1.0	24.3	6.1	2.3	4.6	3.4
Financial	60.4	17.2	1.8	21.1	7.2	1.9	14.9	14.1
Mission	1.8	8.5	9.5	5.4	7.3	8.7	6.6	7.3
North Beach	1.0	5.3	1.0	7.9	2.3	3.3	3.7	3.1
North Central	0.9	8.7	0.5	7.6	16.5	16.3	10.4	12.5
Northwest	0.7	5.8	1.0	0.0	8.1	11.3	4.8	8.4
South of Market	14.4	17.4	43.8	19.2	12.9	5.3	17.8	9.1
Southwest	2.2	14.4	7.2	1.9	23.7	39.4	18.7	29.0
Van Ness	1.5	6.8	2.6	5.4	5.7	6.2	5.4	5.4
Unclassified	11.5	7.2	6.7	6.3	6.9	2.4	9.0	4.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	4.2	7.3	11.3	0.4	2.9	68.8	5.1	100.0
Civic Center	24.3	13.9	0.4	7.6	4.5	44.2	5.0	100.0
Financial	74.2	9.7	0.2	1.6	1.3	9.1	3.9	100.0
Mission	4.3	9.2	1.7	0.8	2.5	78.3	3.3	100.0
North Beach	5.8	13.6	0.4	2.7	1.9	71.1	4.5	100.0
North Central	1.3	5.5	0.1	0.6	3.3	86.1	3.1	100.0
Northwest	1.5	5.5	0.2	0.0	2.4	88.4	2.1	100.0
South of Market	27.3	15.0	6.3	2.2	3.6	38.3	7.2	100.0
Southwest	1.3	3.9	0.3	0.1	2.1	89.9	2.4	100.0
Van Ness	4.7	10.1	0.6	1.1	2.7	77.1	3.8	100.0
Unclassified	41.7	11.9	1.8	1.4	3.7	32.5	7.0	100.0
TOTAL	17.3	7.9	1.3	1.1	2.5	66.2	3.7	100.0

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, 2018**

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 (2018 \$ 000s)

<i>C&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	\$14,209	\$12,556	\$5,866	\$2,049	\$22,793	\$153,653	\$1,102	\$212,227
Civic Center	\$23,150	\$10,832	\$33	\$11,104	\$5,596	\$117,639	\$650	\$169,004
Financial	\$628,324	\$127,379	\$3,509	\$23,903	\$5,814	\$139,893	\$10,479	\$939,300
Mission	\$78,386	\$8,905	\$19,504	\$1,484	\$5,276	\$137,150	\$656	\$251,359
North Beach	\$5,158	\$5,438	\$835	\$3,345	\$1,088	\$43,763	\$112	\$59,740
North Central	\$10,165	\$10,428	\$508	\$1,258	\$32,136	\$181,408	\$1,811	\$237,714
Northwest	\$2,395	\$4,269	\$98	\$0	\$10,822	\$104,879	\$8,109	\$130,572
South of Market	\$375,740	\$52,898	\$57,180	\$66,487	\$11,218	\$573,039	\$17,736	\$1,154,297
Southwest	\$24,367	\$38,758	\$3,579	\$48	\$30,804	\$461,971	\$5,767	\$565,294
Van Ness	\$17,711	\$11,424	\$477	\$379	\$7,286	\$134,454	\$16,684	\$188,416
Unclassified	\$310,342	\$23,298	\$3,884	\$3,194	\$12,177	\$321,122	\$13,204	\$687,221
TOTAL	\$1,489,947	\$306,185	\$95,472	\$113,251	\$145,009	\$2,368,971	\$76,309	\$4,595,143

Annual Percentage Distribution by C&I District

<i>C&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	1.0	4.1	6.1	1.8	15.7	6.5	1.4	4.6
Civic Center	1.6	3.5	0.0	9.8	3.9	5.0	0.9	3.7
Financial	42.2	41.6	3.7	21.1	4.0	5.9	13.7	20.4
Mission	5.3	2.9	20.4	1.3	3.6	5.8	0.9	5.5
North Beach	0.3	1.8	0.9	3.0	0.8	1.8	0.1	1.3
North Central	0.7	3.4	0.5	1.1	22.2	7.7	2.4	5.2
Northwest	0.2	1.4	0.1	0.0	7.5	4.4	10.6	2.8
South of Market	25.2	17.3	59.9	58.7	7.7	24.2	23.2	25.1
Southwest	1.6	12.7	3.7	0.0	21.2	19.5	7.6	12.3
Van Ness	1.2	3.7	0.5	0.3	5.0	5.7	21.9	4.1
Unclassified	20.8	7.6	4.1	2.8	8.4	13.6	17.3	15.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Annual Percentage Distribution by Land Use Category

<i>C&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	6.7	5.9	2.8	1.0	10.7	72.4	0.5	100.0
Civic Center	13.7	6.4	0.0	6.6	3.3	69.6	0.4	100.0
Financial	66.9	13.6	0.4	2.5	0.6	14.9	1.1	100.0
Mission	31.2	3.5	7.8	0.6	2.1	54.6	0.3	100.0
North Beach	8.6	9.1	1.4	5.6	1.8	73.3	0.2	100.0
North Central	4.3	4.4	0.2	0.5	13.5	76.3	0.8	100.0
Northwest	1.8	3.3	0.1	0.0	8.3	80.3	6.2	100.0
South of Market	32.6	4.6	5.0	5.8	1.0	49.6	1.5	100.0
Southwest	4.3	6.9	0.6	0.0	5.4	81.7	1.0	100.0
Van Ness	9.4	6.1	0.3	0.2	3.9	71.4	8.9	100.0
Unclassified	45.2	3.4	0.6	0.5	1.8	46.7	1.9	100.0
TOTAL	32.4	6.7	2.1	2.5	3.2	51.6	1.7	100.0

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, 2018

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 (2018 \$ 000s)

<i>C&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	\$394.7	\$202.5	\$60.5	\$683.1	\$911.7	\$261.3	\$25.1	\$248.2
Civic Center	\$94.1	\$76.8	\$8.2	\$144.2	\$121.7	\$263.2	\$12.7	\$167.0
Financial	\$202.2	\$314.5	\$501.3	\$356.8	\$107.7	\$368.1	\$63.5	\$224.4
Mission	\$842.9	\$44.5	\$527.1	\$87.3	\$95.9	\$80.3	\$9.0	\$115.1
North Beach	\$97.3	\$43.5	\$208.8	\$133.8	\$64.0	\$67.0	\$2.7	\$65.1
North Central	\$216.3	\$50.9	\$254.0	\$52.4	\$259.2	\$56.5	\$15.7	\$63.7
Northwest	\$64.7	\$31.2	\$24.5	--	\$177.4	\$47.3	\$153.0	\$52.0
South of Market	\$505.7	\$129.3	\$334.4	\$1,089.9	\$115.6	\$550.5	\$90.0	\$424.5
Southwest	\$215.6	\$114.0	\$127.8	\$8.0	\$173.1	\$59.5	\$27.9	\$65.5
Van Ness	\$236.1	\$71.0	\$47.7	\$22.3	\$169.5	\$109.2	\$278.1	\$118.0
Unclassified	\$522.5	\$137.9	\$149.4	\$159.7	\$234.2	\$693.6	\$132.0	\$482.6
Citywide Average	\$289.6	\$130.1	\$244.8	\$357.3	\$192.8	\$120.2	\$69.0	\$154.4

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, 2018

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	24	3,300	1,544	267	5,144
Retail	12	9	1,182	745	406	2,354
PDR	1	7	215	118	49	390
Hotel	3	4	135	133	42	317
CIE	3	6	414	250	79	752
Residential	120	158	11,869	5,811	1,744	19,702
Other	14	14	288	469	321	1,106
TOTAL	162	222	17,403	9,070	2,908	29,765

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	5.6	10.8	19.0	17.0	9.2	17.3
Retail	7.4	4.1	6.8	8.2	14.0	7.9
PDR	0.6	3.2	1.2	1.3	1.7	1.3
Hotel	1.9	1.8	0.8	1.5	1.4	1.1
CIE	1.9	2.7	2.4	2.8	2.7	2.5
Residential	74.1	71.2	68.2	64.1	60.0	66.2
Other	8.6	6.3	1.7	5.2	11.0	3.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

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	0.5	64.2	30.0	5.2	100.0
Retail	0.5	0.4	50.2	31.6	17.2	100.0
PDR	0.3	1.8	55.1	30.3	12.6	100.0
Hotel	0.9	1.3	42.6	42.0	13.2	100.0
CIE	0.4	0.8	55.1	33.2	10.5	100.0
Residential	0.6	0.8	60.2	29.5	8.9	100.0
Other	1.3	1.3	26.0	42.4	29.0	100.0
TOTAL	0.5	0.7	58.5	30.5	9.8	100.0

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, 2018

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 (2018 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$3,421	\$7,234	\$665,502	\$707,456	\$106,335	\$1,489,947
Retail	\$324	\$113	\$69,209	\$202,729	\$33,810	\$306,185
PDR	\$30	\$100	\$17,966	\$27,224	\$50,152	\$95,472
Hotel	\$3,172	\$48	\$11,560	\$56,304	\$42,167	\$113,251
CIE	\$340	\$77	\$38,894	\$77,557	\$28,142	\$145,009
Residential	\$32,441	\$3,879	\$329,911	\$1,225,034	\$777,705	\$2,368,971
Other	\$4,585	\$64	\$11,556	\$56,477	\$3,628	\$76,309
TOTAL	\$44,313	\$11,514	\$1,144,598	\$2,352,781	\$1,041,938	\$4,595,143

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	7.7	62.8	58.1	30.1	10.2	32.4
Retail	0.7	1.0	6.0	8.6	3.2	6.7
PDR	0.1	0.9	1.6	1.2	4.8	2.1
Hotel	7.2	0.4	1.0	2.4	4.0	2.5
CIE	0.8	0.7	3.4	3.3	2.7	3.2
Residential	73.2	33.7	28.8	52.1	74.6	51.6
Other	10.3	0.6	1.0	2.4	0.3	1.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.2	0.5	44.7	47.5	7.1	100.0
Retail	0.1	0.0	22.6	66.2	11.0	100.0
PDR	0.0	0.1	18.8	28.5	52.5	100.0
Hotel	2.8	0.0	10.2	49.7	37.2	100.0
CIE	0.2	0.1	26.8	53.5	19.4	100.0
Residential	1.4	0.2	13.9	51.7	32.8	100.0
Other	6.0	0.1	15.1	74.0	4.8	100.0
TOTAL	1.0	0.3	24.9	51.2	22.7	100.0

Table 6.4.1.C
AVERAGE CONSTRUCTION
COSTS BY LAND USE
CATEGORY AND PERMIT
STATUS, 2018

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 (2018 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$380.1	\$301.4	\$201.7	\$458.2	\$398.3	\$289.6
Retail	\$27.0	\$12.5	\$58.6	\$272.1	\$83.3	\$130.1
PDR	\$30.0	\$14.3	\$83.6	\$230.7	\$1,023.5	\$244.8
Hotel	\$1,057.2	\$12.0	\$85.6	\$423.3	\$1,004.0	\$357.3
CIE	\$113.3	\$12.8	\$93.9	\$310.2	\$356.2	\$192.8
Residential	\$270.3	\$24.6	\$27.8	\$210.8	\$445.9	\$120.2
Other	\$327.5	\$4.6	\$40.1	\$120.4	\$11.3	\$69.0
TOTAL	\$273.5	\$51.9	\$65.8	\$259.4	\$358.3	\$154.4

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, 2018

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&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	2	16	490	231	116	855
Civic Center	10	6	615	289	92	1,012
Financial	8	24	2,676	1,221	256	4,185
Mission	18	18	1,186	702	260	2,184
North Beach	6	12	536	240	124	918
North Central	21	27	2,136	1,159	387	3,730
Northwest	13	20	1,456	772	248	2,509
South of Market	10	17	1,438	941	313	2,719
Southwest	55	63	5,173	2,499	842	8,632
Van Ness	10	14	969	418	182	1,593
Unclassified	9	5	728	598	84	1,424
TOTAL	162	222	17,403	9,070	2,904	29,761

Percentage Distribution by C&I District

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	1.2	7.2	2.8	2.5	4.0	2.9
Civic Center	6.2	2.7	3.5	3.2	3.2	3.4
Financial	4.9	10.8	15.4	13.5	8.8	14.1
Mission	11.1	8.1	6.8	7.7	9.0	7.3
North Beach	3.7	5.4	3.1	2.6	4.3	3.1
North Central	13.0	12.2	12.3	12.8	13.3	12.5
Northwest	8.0	9.0	8.4	8.5	8.5	8.4
South of Market	6.2	7.7	8.3	10.4	10.8	9.1
Southwest	34.0	28.4	29.7	27.6	29.0	29.0
Van Ness	6.2	6.3	5.6	4.6	6.3	5.4
Unclassified	5.6	2.3	4.2	6.6	2.9	4.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	0.2	1.9	57.3	27.0	13.6	100.0
Civic Center	1.0	0.6	60.8	28.6	9.1	100.0
Financial	0.2	0.6	63.9	29.2	6.1	100.0
Mission	0.8	0.8	54.3	32.1	11.9	100.0
North Beach	0.7	1.3	58.4	26.1	13.5	100.0
North Central	0.6	0.7	57.3	31.1	10.4	100.0
Northwest	0.5	0.8	58.0	30.8	9.9	100.0
South of Market	0.4	0.6	52.9	34.6	11.5	100.0
Southwest	0.6	0.7	59.9	29.0	9.8	100.0
Van Ness	0.6	0.9	60.8	26.2	11.4	100.0
Unclassified	0.6	0.4	51.1	42.0	5.9	100.0
TOTAL	0.5	0.7	58.5	30.5	9.8	100.0

Table 6.4.2.B**TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2018**

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 (2018 \$ 000s)

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	\$33	\$91	\$25,415	\$18,121	\$168,567	\$212,227
Civic Center	\$3,446	\$35	\$37,920	\$62,581	\$65,021	\$169,004
Financial	\$116	\$6,084	\$428,641	\$431,068	\$73,391	\$939,300
Mission	\$1,790	\$207	\$38,753	\$178,543	\$32,067	\$251,359
North Beach	\$539	\$355	\$21,331	\$18,643	\$18,872	\$59,740
North Central	\$6,984	\$1,090	\$69,223	\$108,401	\$52,016	\$237,714
Northwest	\$1,419	\$341	\$41,199	\$59,109	\$28,504	\$130,572
South of Market	\$3,834	\$394	\$136,871	\$631,147	\$382,052	\$1,154,297
Southwest	\$12,873	\$1,460	\$148,853	\$293,656	\$108,451	\$565,294
Van Ness	\$639	\$243	\$60,133	\$93,671	\$33,557	\$188,243
Unclassified	\$12,640	\$1,214	\$136,259	\$457,840	\$79,268	\$687,221
TOTAL	\$44,313	\$11,514	\$1,144,598	\$2,352,781	\$1,041,765	\$4,594,971

Percentage Distribution by C&I District

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	0.1	0.8	2.2	0.8	16.2	4.6
Civic Center	7.8	0.3	3.3	2.7	6.2	3.7
Financial	0.3	52.8	37.4	18.3	7.0	20.4
Mission	4.0	1.8	3.4	7.6	3.1	5.5
North Beach	1.2	3.1	1.9	0.8	1.8	1.3
North Central	15.8	9.5	6.0	4.6	5.0	5.2
Northwest	3.2	3.0	3.6	2.5	2.7	2.8
South of Market	8.7	3.4	12.0	26.8	36.7	25.1
Southwest	29.1	12.7	13.0	12.5	10.4	12.3
Van Ness	1.4	2.1	5.3	4.0	3.2	4.1
Unclassified	28.5	10.5	11.9	19.5	7.6	15.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

<i>C&I District</i>	<i>Approved</i>	<i>Canceled</i>	<i>Completed</i>	<i>Issued</i>	<i>Other</i>	<i>TOTAL</i>
Bayview	0.0	0.0	12.0	8.5	79.4	100.0
Civic Center	2.0	0.0	22.4	37.0	38.5	100.0
Financial	0.0	0.6	45.6	45.9	7.8	100.0
Mission	0.7	0.1	15.4	71.0	12.8	100.0
North Beach	0.9	0.6	35.7	31.2	31.6	100.0
North Central	2.9	0.5	29.1	45.6	21.9	100.0
Northwest	1.1	0.3	31.6	45.3	21.8	100.0
South of Market	0.3	0.0	11.9	54.7	33.1	100.0
Southwest	2.3	0.3	26.3	51.9	19.2	100.0
Van Ness	0.3	0.1	31.9	49.8	17.8	100.0
Unclassified	1.8	0.2	19.8	66.6	11.5	100.0
TOTAL	1.0	0.3	24.9	51.2	22.7	100.0

Table 6.4.2.C
AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2018

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 (2018 \$ 000s)

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	\$16.5	\$5.7	\$51.9	\$78.4	\$1,453.2	\$248.2
Civic Center	\$344.6	\$5.9	\$61.7	\$216.5	\$706.8	\$167.0
Financial	\$14.4	\$253.5	\$160.2	\$353.0	\$286.7	\$224.4
Mission	\$99.4	\$11.5	\$32.7	\$254.3	\$123.3	\$115.1
North Beach	\$89.8	\$29.6	\$39.8	\$77.7	\$152.2	\$65.1
North Central	\$332.6	\$40.4	\$32.4	\$93.5	\$134.4	\$63.7
Northwest	\$109.2	\$17.0	\$28.3	\$76.6	\$114.9	\$52.0
South of Market	\$383.4	\$23.2	\$95.2	\$670.7	\$1,220.6	\$424.5
Southwest	\$234.1	\$23.2	\$28.8	\$117.5	\$128.8	\$65.5
Van Ness	\$63.9	\$17.4	\$62.1	\$224.1	\$184.4	\$118.2
Unclassified	\$1,404.4	\$242.8	\$187.2	\$765.6	\$943.7	\$482.6
TOTAL	\$273.5	\$51.9	\$65.8	\$259.4	\$358.7	\$154.4

Note: Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

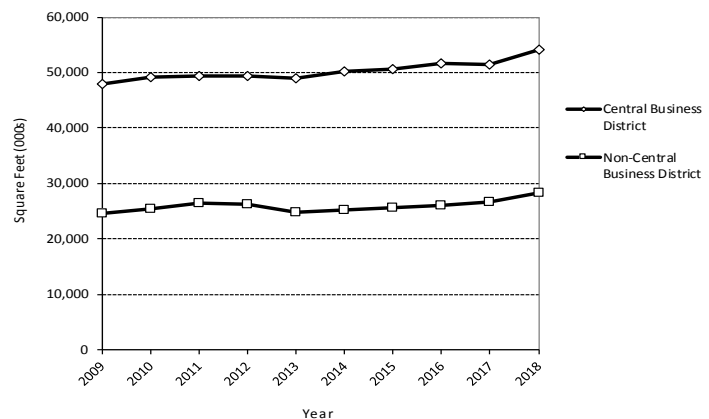
Table & Figure 6.5
TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 2009–2018

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	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Central Business District	48,039	49,158	49,310	49,368	49,048	50,154	50,604	51,633	51,535	54,042
Non-Central Business District	24,569	25,539	26,488	26,205	24,871	25,252	25,602	26,133	26,633	28,238
TOTAL	72,608	74,697	75,798	75,573	73,919	75,406	76,206	77,766	78,168	82,280

Percentage Change

Location	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Central Business District	2.3	0.3	0.1	-0.6	2.3	0.9	2.0	-0.2	4.9
Non-Central Business District	3.9	3.7	-1.1	-5.1	1.5	1.4	2.1	1.9	6.0
TOTAL	2.9	1.5	-0.3	-2.2	2.0	1.1	2.0	0.5	5.3



Select Areas for Land Use Tables

0 Miles 1

MAP 6.2

Table 6.6
LAND USE SQUARE FOOTAGE BY SELECT AREAS, 2018

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
Visitation 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
TOTAL	423,229.7	27,050.3	15,664.2	16,888.4	56,974.1	73,933.7	4,394.3	25,413.0	289,024.9	51,485.6	4,068.1	988,081.2

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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
TOTAL	42.8	2.7	1.6	1.7	5.8	7.5	0.4	2.6	29.3	5.2	0.4	100.0

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
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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, 2013–2018

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					
	2013	2014	2015	2016	2017	2018	2013	2014	2015	2016	2017	2018
Drive Alone	36.4	34.2	35.3	33.7	32.4	30.3	33.3	33.0	33.6	33.2	32.7	31.3
Carpool/Vanpool	6.8	7.1	6.5	6.7	6.2	8.6	9.4	9.3	8.6	8.9	8.2	9.2
Transit	32.7	34.0	34.7	34.3	34.7	33.5	39.4	40.0	40.3	40.1	40.3	39.9
Walk	10.9	11.2	10.4	11.1	12.0	12.7	7.8	7.7	7.5	7.4	8.1	8.6
Bicycle	3.8	4.4	4.3	3.9	3.1	4.2	2.7	3.0	3.1	2.7	2.2	3.0
Work at Home	6.8	7.0	6.2	6.4	7.2	6.3	4.9	4.8	4.3	4.3	4.9	4.3
Other	2.6	2.1	2.7	4.0	4.4	4.4	2.6	2.2	2.7	3.4	3.5	3.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: US Census, American Community Surveys.

Table 7.3**PRIVATE VEHICLE OCCUPANCY IN San Francisco, 2012–2018**

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>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>
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 & 2018**

Table 7.4 presents data on average daily ridership on MUNI lines for 2012 and 2018.

Daily Ridership by Route

<i>Route Nos.</i>	<i>Route Name</i>	<i>2012</i>	<i>2018</i>	<i>Difference</i>	<i>% Change</i>
1, 1AX, 1BX	California	28,870	25,514	-3,356	-11.6%
2	Clement	5,853	5,206	-647	-11.1%
3	Jackson	3,376	2,379	-997	-29.5%
5, 5R	Fulton	17,158	21,246	4,088	23.8%
6	Parnassus	10,543	7,902	-2,641	-25.0%
7, 7R, 7X	Haight-Noriega	13,566	12,816	-750	-5.5%
8, 8AX, 8BX	Bayshore	40,050	38,018	-2,032	-5.1%
9, 9R	San Bruno	15,453	20,915	5,462	35.3%
10	Townsend	5,631	7,552	1,921	34.1%
12	Folsom	4,281	6,768	2,487	58.1%
14, 14R, 14X	Mission	44,162	51,910	7,748	17.5%
18	46th Avenue	3,758	3,169	-589	-15.7%
19	Polk	7,699	6,675	-1,024	-13.3%
21	Hayes	11,353	6,641	-4,712	-41.5%
22	Fillmore	17,772	15,726	-2,046	-11.5%
23	Monterey	4,278	3,549	-729	-17.0%
24	Divisadero	10,662	11,741	1,079	10.1%
25	Treasure Island	3,455	2,301	-1,154	-33.4%
27	Bryant	7,939	5,798	-2,141	-27.0%
28, 28R	19th Avenue	14,423	16,932	2,509	17.4%
29	Sunset	15,376	18,400	3,024	19.7%
30, 30X	Stockton	35,238	23,349	-11,889	-33.7%
31, 31AX, 31BX	Balboa	10,985	10,429	-556	-5.1%
33	Stanyan	6,101	5,486	-615	-10.1%
35	Eureka	850	1,075	225	26.5%
36	Teresita	1,246	1,437	191	15.3%
37	Corbett	1,742	2,200	458	26.3%
38, 38R, 38AX, 38BX	Geary	55,042	56,587	1,545	2.8%
39	Coit	859	432	-427	-49.7%
41	Union	3,533	2,996	-537	-15.2%
43	Masonic	14,600	13,067	-1,533	-10.5%
44	O'Shaughnessy	15,875	17,285	1,410	8.9%
45	Union-Stockton	12,149	9,286	-2,863	-23.6%

Source:
San Francisco Municipal
Transportation Agency

CONTINUED >

TABLE 7.4
TRANSIT RIDERSHIP
ON MUNI LINES, 2012
& 2018 (CONTINUED)

Daily Ridership by Route

Route Nos.	Route Name	2012	2018	Difference	% Change
47	Van Ness	12,338	12,086	-252	-2.0%
48	Quintara–24th Street	11,210	8,342	-2,868	-25.6%
49	Van Ness–Mission	27,427	25,148	-2,279	-8.3%
52	Excelsior	2,050	1,967	-83	-4.0%
54	Felton	6,628	6,554	-74	-1.1%
55	16th Street	N/A	1,940	N/A	N/A
56	Rutland	605	340	-265	-43.8%
57	Parkmerced	735	0	-735	-100.0%
66	Quintara	687	725	38	5.5%
67	Bernal Heights	1,253	1,307	54	4.3%
80X	Gateway Express	12	N/A	N/A	N/A
81X	Caltrain Express	251	128	-123	-49.0%
82X	Levi Plaza	1,060	487	-573	-54.1%
83X	Mid-Market Express	0	273	273	#DIV/0!
88	BART Shuttle	431	422	-9	-2.1%
90	Owl	217	278	61	28.1%
91	Owl	497	685	188	37.8%
E	Embarcadero	N/A	1,760	N/A	N/A
F	Market	23,449	19,699	-3,750	-16.0%
J	Church	14,988	15,450	462	3.1%
K/T	Ingleside/Third	31,637	40,640	9,003	28.5%
L	Taraval	26,566	33,205	6,639	25.0%
M	Ocean View	27,270	31,585	4,315	15.8%
N, NX	Judah	40,529	44,174	3,645	9.0%
Cable Cars		20,162	16,910	-3,252	-16.1%
		693,881	698,892	5,011	0.7%

Table 7.5
TRANSIT IMPACT
DEVELOPMENT FEE
(TIDF) REVENUE
COLLECTED (INFLATION-
ADJUSTED), FISCAL
YEARS 2009–2018

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2008 (July 1, 2008 - June 30, 2009) in 2018 dollars.

Fiscal Year	Fee Structure	Collections (2018 \$)
2008-2009	2007 Ordinance	\$5,644,511
2009-2010	2007 Ordinance	\$2,285,197
2010-2011	2010 Ordinance	\$1,274,009
2011-2012	2010 Ordinance	\$2,000,398
2012-2013	2010 / 2013 Ordinance	\$5,441,483
2013-2014	2013/2014 Ordinance	\$14,156,263
2014-2015	2014 Ordinance	\$14,666,660
2015-2016	2014 Ordinance	\$39,960,612
2016-2017	2014 Ordinance	\$49,645,458
2017-2018	2014 Ordinance	\$18,461,054

Source: San Francisco Controller's Office

Acknowledgements

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