





SAN FRANCISCO
PLANNING DEPARTMENT

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2012

**SAN FRANCISCO
COMMERCE & INDUSTRY INVENTORY**

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About the 2012 Commerce & Industry Inventory

This is the nineteenth Commerce & Industry Inventory prepared by the San Francisco Planning Department. It presents findings and data through calendar year 2012.

This Inventory provides information on economic activities in San Francisco from 2003 through 2012, including population, labor force, employment, establishments, wages, retail sales, monetary transactions, building activity, land use, and transportation.

The short-term goal of this annual Inventory is to make local land use-related economic data available to community groups, businesses, and private and public agencies.

The long-term goal is to establish a consistent time series of economic land use-related data and compile background information for the periodic update of the Commerce and Industry Element of the San Francisco General Plan.

The analysis of economic trends and policy recommendations regarding economic activity in San Francisco are also contained in various documents published periodically by the San Francisco Planning Department.

The 2012 Commerce & Industry Inventory is organized as follows:

1. About the 2012 Commerce & Industry Inventory

2. Infographic Highlights

3. Findings: San Francisco Economy in 2012

4. Appendix: Data 2012

The first three sections summarize key points. The Appendix contains the updated text and data continued from previous (pre-2011) Commerce and Industry Inventories.

FORMAT OF THE 2012 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 2012** summarizes the main points of the updated Commerce & Industry Inventory. The **Appendix** contains the full data tables and also describes key methodological points.

A spreadsheet of the C&I data will also be 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 on updating the *Commerce & Industry Inventory*. You can send them to scott.edmondson@sfgov.org (subject line: Updating the C&I).

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's economy in historical and geographical context four subregions.
- **3.0 Employment** presents data for Industry Group, Land Use Category, and Commerce and Industry (C&I) District.
- **4.0 Establishments** presents data on the number and distribution of active business establishments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size-class.
- **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.

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**. 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.

Commerce & Industry (C&I) Districts

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

- The **Financial District** includes the city's densest area with the highest concentration of employment and establishments.
- The **Civic Center** has high concentrations of institutional and government activities.
- The **Van Ness** district encompasses a commercial corridor surrounded by mid- to high-density residential buildings.
- The **Mission** and **North Beach** districts have intense local retail activities and distinct identities for the local and visitor populations.
- The **South of Market (SoMa)** district reflects a unique mix of office, PDR activities, residential and other uses located between the Financial District and Bayview, and contains a historic building stock adaptable to a range of uses.
- The **Bayview** district houses a high concentration of Production/Distribution/Repair (PDR) activities and

has a relatively low density of population, employment, and establishments.

- The **North Central** district contains a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and the more peripheral residential areas to the west.
- The **Southwest** and **Northwest** districts are predominantly residential, with a very low business density overall, but concentrated in mostly local-serving neighborhood commercial corridors.
- The **Unclassified** category represents home-based business establishments and organizations without physical addresses, particularly care givers, which do not register a physical address with the state and thus cannot be assigned to specific geographic districts. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

Land Use Categories

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

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

- **Office activity** includes professional services such as administration, legal services, architecture, engineering, real estate, computer services, research and

development activities, and government administrative functions. Three types of spaces are considered: primary offices, which mainly include headquarters and large firms; secondary offices, which include small professional offices and services; and walk-in customer facilities such as bank branches.

- **Retail activity** includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, and beauty shops.
- **Production/Distribution/Repair (PDR) activity** includes establishments related to processing, movement, and repair of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation (including vehicle maintenance and repair), information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel activity** is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.
- **Cultural/Institutional/Educational (CIE) activities** cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories.
- **Private Household (Pvt HH)**, formerly counted under the CIE land use category, is tracked separately beginning in 2009 (because of improved data reporting). This land use category involves households located

throughout San Francisco that contract for and employ workers on or about their premises in activities primarily concerned with the operation of the household. These household employees include cooks, maids, butlers, private caregivers, gardeners, grounds keeper/caretakers, and other household maintenance workers.

Industry Groups

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

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

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

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

Infographic Highlights

2012 Commerce & Industry Inventory

SUMMARY

2012

*Change from 2011***JOBs**

SEE TABLE 3.1

586,260**▲ 5%****UNEMPLOYMENT RATE**

SEE TABLE 2.14

7.8%**▼ FROM 8.6%****ESTABLISHMENTS**

SEE TABLE 4.1

55,470**▲ 0.4%****TOTAL WAGES CITYWIDE**

SEE TABLE 5.1.1

\$49 BILLION**▲ 9%****AVERAGE WAGE PER JOB**

SEE TABLE 5.1.2

\$83,570**▲ 1%****BUILDING PERMITS**

SEE TABLE 6.1.1A

24,300**▲ 7.5%****CONSTRUCTION SPENDING**

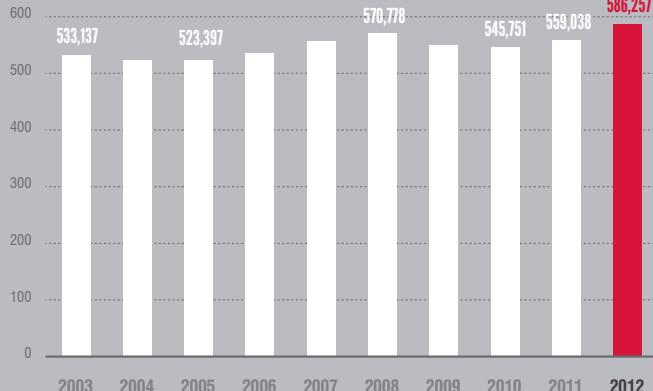
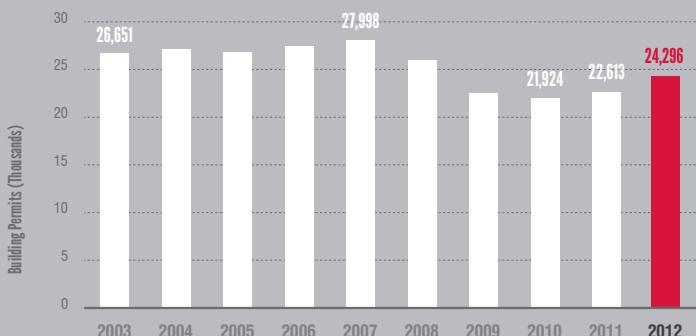
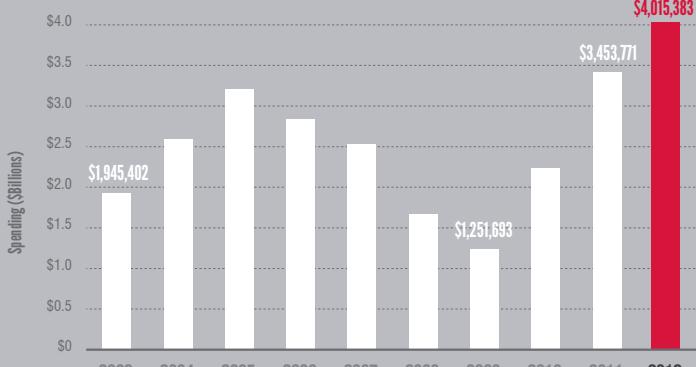
SEE TABLE 6.1.1B

\$4 BILLION**▲ 16%****TAXABLE RETAIL SALES**

SEE TABLE 5.2.1

\$16 BILLION**▲ 7%****CITY REVENUE**

SEE TABLE 5.3.1

\$4.26 BILLION**▲ 3%****JOBs****BUILDING PERMITS****CONSTRUCTION SPENDING****CITY EXPENDITURE**

SEE TABLE 5.3.2

\$4.06 BILLION**▲ 7%**

SAN FRANCISCO IN THE REGION

Small area. Larger role.



2012 POPULATION

SEE TABLE 2.1.1

825,100*San Francisco***7,327,600***Region**San Francisco's share of regional population.*

San Francisco has 11% of the region's population.

POPULATION CHANGE

SEE TABLE 2.1.1

4.1% 2002 - 2012
(10 YEAR) **5%****1.55%** 2011 - 2012
(1 YEAR) **1.08%***San Francisco**Region*

San Francisco's population grew faster than the region's last year.

2012 UNEMPLOYMENT RATE

SEE TABLE 2.1.4

7.8%*San Francisco*

FROM 2011

8.4%*Bay Area*

FROM 2011

10.5%*State*

FROM 2011

San Francisco's unemployment rate is lower than the Bay Area's and State's rates.

2012 JOBS

SEE TABLES 3.1 & 2.2.2

586,250*San Francisco***3,216,100***Region**San Francisco's share of regional jobs.*

San Francisco has 17% of the region's jobs.

JOB GROWTH

SEE TABLES 3.1 & 2.2.2

10% 2002 - 2012
(10 YEAR) **1%****5%** 2011 - 2012
(1 YEAR) **3%***San Francisco**Region*

Employment growth in San Francisco outpaced that of the region.

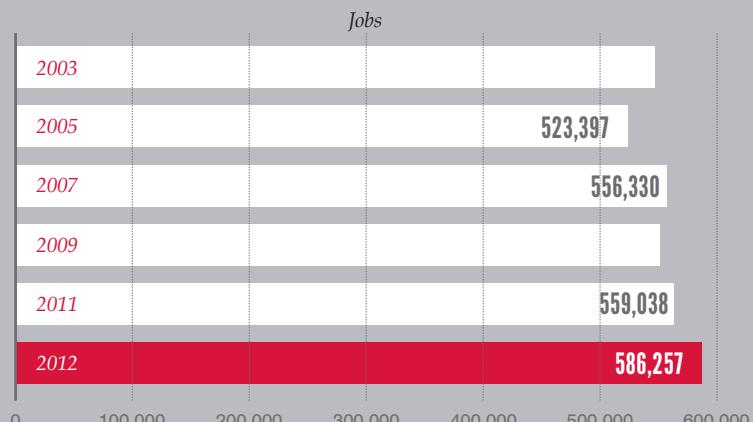
SHARE OF JOBS BY SECTOR 2012

Employment Sector	San Francisco	Region
INFORMATION	4%	4%
MANUFACTURING	2%	10%
FINANCIAL SERVICES	9%	5%
PROFESSIONAL & BUSINESS SERVICES	25%	19%
LEISURE & HOSPITALITY	15%	11%

San Francisco's economic profile shows more jobs in financial services and less in manufacturing.

EMPLOYMENT IN SAN FRANCISCO

Employment up 5% in the past year, 10% over the decade.



Employment varied over the decade.

SEE TABLE 3.1

SHARE OF JOBS BY LAND USE

Land Use Category	2003	2011	2012	CHANGE IN # OF JOBS		JOB CONCENTRATION BY LAND USE + C&I DIST	
				2003-12	Highest concentration	2nd highest concentration	
OFFICE	38%	39%	40%	15%	FINANCIAL 53%	SOMA 25%	
RETAIL	18%	18%	18%	11%	SOMA 20%	FINANCIAL 17%	
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	18%	13%	13%	-19%	SOMA 36%	FINANCIAL 28%	
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	23%	23%	23%	6%	NORTH CENTRAL 32%	--	
HOTEL	3%	3%	3%	--	FINANCIAL 34%	CIVIC CENTER 28%	
PRIVATE HOUSEHOLDS	--	4%	4%	--	SOUTHWEST 25%	--	

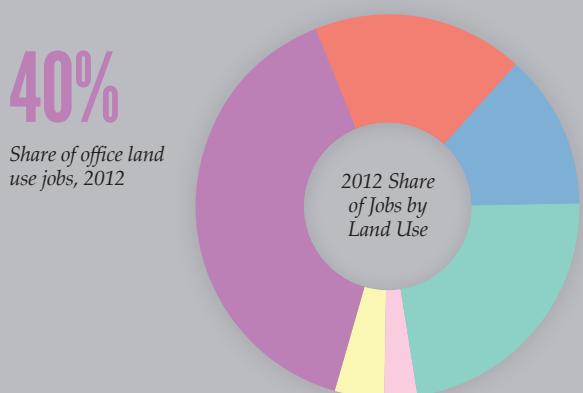
SEE TABLE 3.1

SEE TABLE 3.3

Office land use has most jobs.

All land uses added jobs over the decade, except PDR.

Job concentrations by land use vary geographically.



40%

Change in PDR land use jobs, 2003-2012

ESTABLISHMENTS IN SAN FRANCISCO

Establishments up 0.4% from 2011.

TOTAL ESTABLISHMENTS (2012)

SEE TABLE 4.1

55,471

▲ 0.4%

Change from 2011

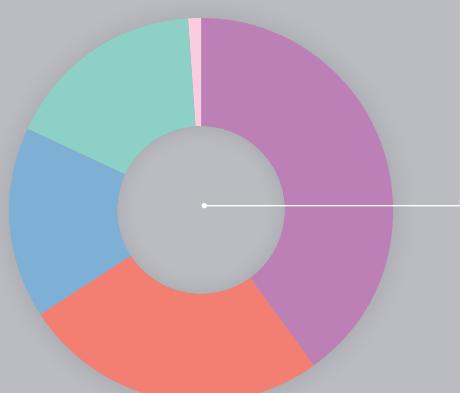
BY LAND USE CATEGORY

SEE TABLE 4.1

Non Private Household	2012	Change 2003-12
OFFICE	11,938	40%
RETAIL	7,666	26%
PRODUCTION / DISTRIBUTION / REPAIR (PDR)	4,500	16%
CULTURAL / INSTITUTIONAL / EDUCATIONAL (CIE)	4,930	17%
HOTEL	297	1%
	29,331	100%
		▲ 6%

Private Household

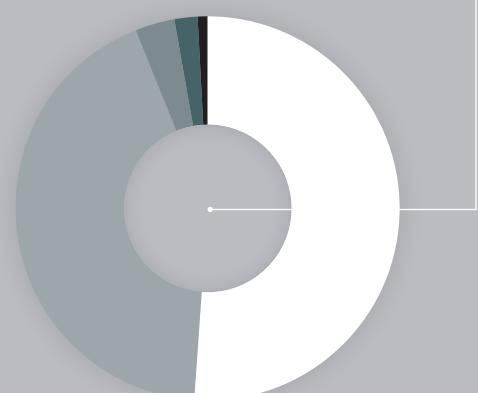
PRIVATE HOUSEHOLDS	26,140	100%	▲ 67%
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BY NUMBER OF EMPLOYEES

SEE TABLE 4.4

Non Private Household	Firms
0 - 4	14,707 50%
5 - 49	12,871 45%
50 - 99	948 3%
100 - 249	554 2%
250 +	251 1%
	29,331 100%



LAND USE & BUILDING IN SAN FRANCISCO

Land Area

TOTAL:

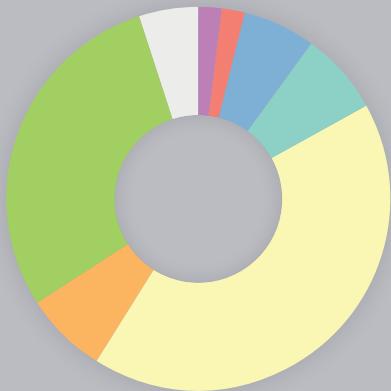
47 Total sq. miles

DEVELOPED

71% **988 MILLION** Sq. ft.

STREETS & FREEWAYS

29%



DEVELOPED LAND AREA (988M SQ. FEET)

SEE TABLE 6.6

Land Use Category	Percentage
Office	2%
Retail	2%
Production / Distribution / Repair (PDR)	6%
Cultural / Institutional / Educational (CIE)	7%
Hotel	0%
Residential	43%
Mixed Use / Other	7%
Public / Open Space	29%
Vacant	5%

Office Space

2012 TOTAL OFFICE SPACE

75.6 MILLION Sq. ft.

▼ 0.3%

Change from 2011

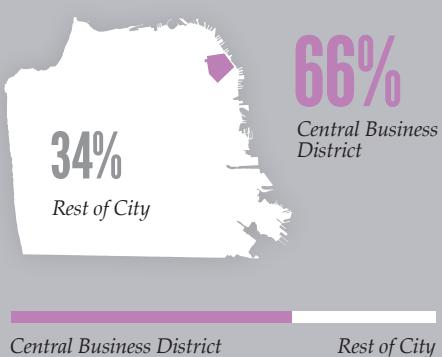
▲ 7%

Change from 2003

SEE TABLE 6.5

SHARE OF OFFICE SPACE

SEE TABLE 6.5



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

Most office space is in the Central Business District.

Building Permits

2012 BUILDING PERMITS:

24,296 Active building permits

▲ 7%

Change from 2011

SEE TABLE 6.1.1.A

▼ -9%

Change from 2003

2012 BUILDING PERMIT STATUS

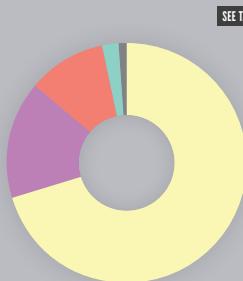
63% Complete



SEE TABLE 6.4.1.A

1% Approved
30% Issued
6% Other

BY LAND USE CATEGORY:

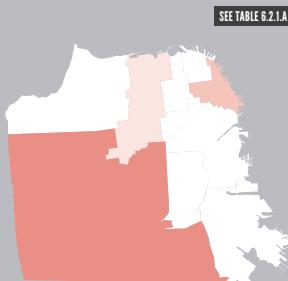


SEE TABLE 6.1.1.A

Land Use Category

RESIDENTIAL	65%
OFFICE	15%
RETAIL	10%
CIE	3%
PDR & HOTEL	2%

BY C&I DISTRICT LOCATION:



SEE TABLE 6.2.1.A

District Location

SOUTHWEST	32%
FINANCIAL	14%
NORTH CENTRAL	13%

Permit volume and construction spending have increased over 2011.

BY CONSTRUCTION COST:

\$4 BILLION

▲ 16%

\$0.56 billion change from 2011

53%

New Construction

47%

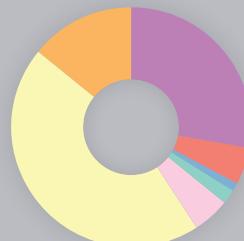
Demolitions & Alterations

SEE TABLE 6.1.1.B

CONSTRUCTION COST BY LAND USE CATEGORY:

Land Use Category

OFFICE	27%
RETAIL	8%
PDR	1%
CIE	8%
HOTEL	1%
RESIDENTIAL	53%
OTHER	3%



Construction spending is highest in residential and office projects, and in the SoMa and Financial C&I districts.

TRANSPORTATION IN SAN FRANCISCO

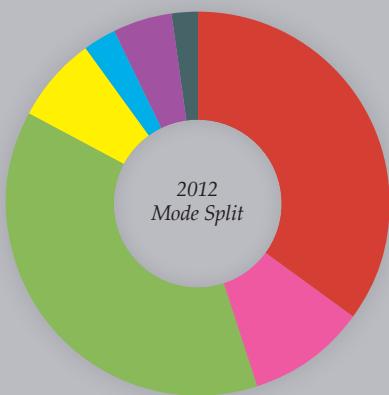
Driving alone to work is down.

Transit and bike commuting are up.

HOW EMPLOYEES IN SAN FRANCISCO COMMUTED TO WORK

Mode	2006	2012	Change
DRIVE ALONE	38%	35%	▼
CARPOOL / VANPOOL	11%	10%	▼
TRANSIT	36%	38%	▲
WALK	7%	7%	--
BICYCLE	2%	3%	▲
WORK AT HOME	6%	5%	▼
OTHER	2%	2%	--

SEE TABLE 7.1



PRIVATE VEHICLE OCCUPANCY (2004 - 2012)

SEE TABLE 7.3

1.20

2004

PERSONS PER VEHICLE

1.14

2012

DAILY MUNI RIDERSHIP (2008 - 2012)

SEE TABLE 7.4

657,364

2008

664,326

2012

Daily MUNI ridership up 1.1% since 2008.

BUSIEST MUNI LINES

SEE TABLE 7.4

Line	2008 Daily Trips	2012	Change
9 SAN BRUNO	48,000	59,900	▲
38 GEARY	52,800	55,000	▲
14 MISSION	42,200	44,200	▲
N JUDAH	40,800	40,500	--

TRANSIT IMPACT DEVELOPMENT FEE REVENUE

SEE TABLE 7.5

\$4.6 MILLION
FY 2012-2013

CITY GOVERNMENT

Revenues up 3%.

Spending on services up 7%.

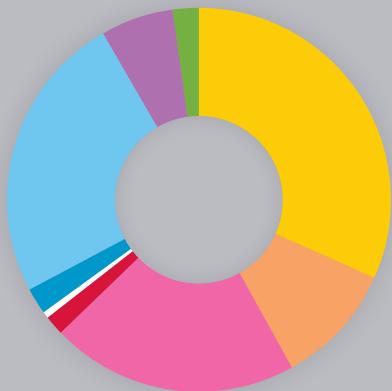
2012 CITY REVENUE

SEE TABLE 5.1

\$4.26 BILLION ▲ 3% FROM 2011

Revenue Source

PROPERTY TAXES	32%
BUSINESS TAXES	10%
OTHER LOCAL TAXES	21%
LICENSES, PERMITS, FINES & PENALTIES	1%
INTEREST & INVESTMENT INCOME	0.7%
RENTS & CONCESSIONS	2%
INTERGOVERNMENTAL	25%
CHARGES FOR SERVICES	6%
OTHER	2%



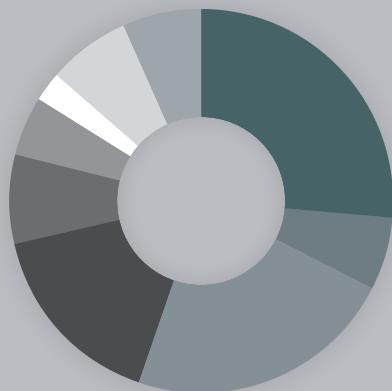
2012 CITY EXPENDITURES

SEE TABLE 5.2

\$4.06 BILLION ▲ 7% FROM 2011

Expenditure Function

PUBLIC PROTECTION	27%
PUBLIC WORKS, TRANSPORTATION & COMMERCE	6%
HUMAN WELFARE & NEIGHBORHOOD DEVELOPMENT	23%
COMMUNITY HEALTH	16%
CULTURE & RECREATION	8%
GENERAL ADMINISTRATION & FINANCE	5%
GENERAL CITY RESPONSIBILITIES	2%
DEBT SERVICE	7%
CAPITAL OUTLAY	7%



Findings: San Francisco Economy in 2012

**Employment
Grows.**

**Recovery
Continues.**

SUMMARY

Employment Grows – Economic Recovery Continues

A quick review of the main data in the *Commerce & Industry Inventory* reveals many positive signs, indicating a continuing economic recovery in 2012.

- Employment, the simplest key indicator of economic activity, grew 5% to 586,250 jobs over 2011 (27,250 additional jobs).
- The unemployment rate fell to 7.8% from 8.6%.
- The number of business establishments increased slightly to 55,470 firms or 0.4% growth over 2011.
- Workers' earnings in the San Francisco economy increased to \$49 billion, almost 9% over 2011, with average earnings per job increasing to \$83,500 per worker, up 1% since last year.
- Building permit applications increased by 7% over 2011 levels to 24,300 applications, and 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 to \$4 billion, or 16% over 2011.
- Taxable retail sales increased 4% over 2011 levels, to \$16 billion.
- City revenue was \$4.26 billion, up 3% over 2011.
- City expenditures were \$4.06 billion in 2012, up 7% from last year.

SAN FRANCISCO IN THE REGION

Small Area / Larger Role

Although San Francisco is less than one percent (0.7%), or 47 square miles out of the 7,041 square miles of the region, it is 17 times denser (population per square mile), has 11% of regional residents, and captures 17% of regional employment.

San Francisco's population increased 1.5% in the past year, to 825,100 residents. This represents a 4% increase over the past decade. In comparison, the region's 7.33 million residents increased 1% from 2011-2012 and 5% between 2003 and 2012.

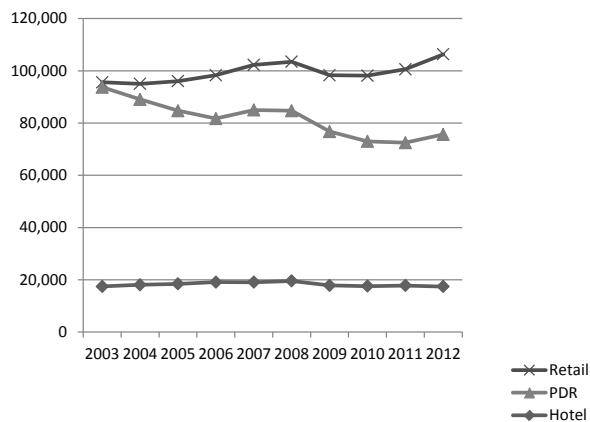
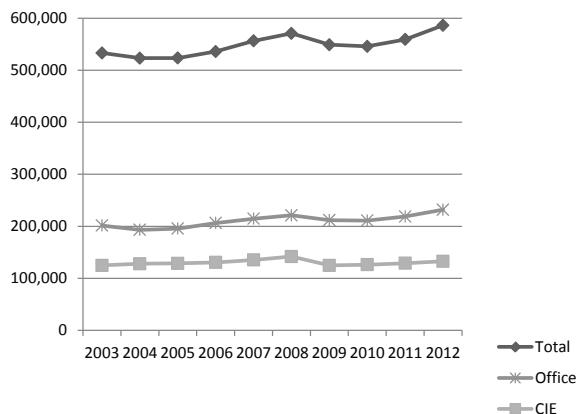
Employment in San Francisco grew by 5% (over 27,000 jobs) in 2012, to 586,250 jobs. Over the past decade, this represents a 10% increase in employment in the city. In contrast, the region actually lost jobs between 2003-12, with employment down 1%, or 31,500 jobs, to 3.22 million jobs. San Francisco's share of regional employment by sector has remained stable between 2003 and 2012. However, the *Share of Jobs 2012* table below shows that San Francisco's economic profile differs from the region. It has about the same relative share of employment in the Information sector as the region, but less in Manufacturing, and more in services (Financial , Professional & Business, and Leisure and Hospitality).

San Francisco's declining unemployment rate - 7.8% in 2012 - was lower than the regional rate of 8.4% and the State rate of 10.5%.

Share of Jobs 2012

Employment Sector	San Francisco	Comparison	Region
Information	4%	Same	4%
Manufacturing	2%	Less	10%
Financial Services	9%	More	5%
Prof. & Business Services	25%	More	19%
Leisure & Hospitality	15%	More	11%

San Francisco Employment by Land Use Category



EMPLOYMENT

Trends

The composition and changes in employment are an important window on San Francisco's economic vitality. Employment in San Francisco rose and fell over the last 10 years. From a low of 523,000 jobs in 2003 and 2004, employment rose 9.1% to 571,000 jobs in 2008 at the height of the speculative financial bubble. The global recession caused employment to slip 4.5% to 546,000 jobs in 2010. However, after showing signs of recovery in 2011, employment in San Francisco grew 5% in 2012, to 586,250 jobs, the highest it's been in a decade.

As the *San Francisco Employment by Land Use Category* graphs illustrate, jobs in the office, retail, hotel, and private household land use categories followed a pattern similar to total jobs: a peak in 2008 and troughs in 2004 and 2010. In contrast, CIE jobs increased relatively consistently over the whole period.¹ PDR jobs declined early in the period, posted minor gains in 2007 (4% over 2006), and declined further after the financial crisis in late 2008. PDR jobs stabilized after 2010, and, mirroring the larger economy, grew by 4% in 2012.

PDR Counterpoint

Because the change in jobs between 2003 and 2012 reflects the substantial twin effects of the dot.com crash (2000) and the global recession (2007-2009), it may overstate longer-term PDR job loss in San Francisco. As a result, it is instructive to examine both the 2003-12 decline in PDR jobs and the 2006-07 increase by sector, as illustrated in the *PDR Jobs by Sector* table below.

PDR Jobs by Sector

Industry Group	2003-12	2006-07
Construction	-17%	12%
Transportation	-25%	-1%
Utilities	-18%	-26%
Information	-29%	35%
Wholesale	-6%	5%
Food Manufacturing	-21%	-4%
Apparel Manufacturing	-68%	-10%
Printing & Publishing	-8%	4%
Other Manufacturing	2%	23%
TOTAL	-19%	4%

1. CIE employment from 2002-2008 estimated based on the share of private household to total CIE employment in years 2009-2011.

Although the declining long-term trend in PDR employment can be attributed to economic restructuring in the larger economy, the 19% loss in PDR jobs between 2003 and 2012 also captures the effects of two economic downturns related to the dot.com bust of 2000 and the financial crisis of 2008. The difference that a growing economy can make is evident in the 4% PDR employment gains both in the past year and in 2006 during the speculative growth preceding the financial crisis.

An examination of PDR subsectors reveals some interesting points. The large loss in the utility sector in both periods indicates a structural decline in utility sector jobs independent of the economic crises. The high 10-year subsector losses compared to the smaller one-year losses or gains indicate that the following subsectors are connected to the cycles of the larger economy and follow it: construction, transportation, wholesale trade, food manufacturing, printing and publishing, and apparel manufacturing.

The dramatic contrast of a 29% loss in the information sector jobs for the 10-year period compared to a 35% gain in 2007 indicates high sensitivity to the cycles of the larger economy and the region's technology sector. The minor 2%, 10-year increase in the "Other Manufacturing" sector of PDR jobs, and its 23% one-year increase in 2007 indicate possible shifts in the composition of types of PDR firms that are not shedding San Francisco jobs or relocating out of the area. It may point to a source of PDR growth in the last year.

Sectoral Composition and Geographic Concentration

The share of employment by land use category, and their relative ranking, has remained stable between 2003 and 2012 (see *Employment by Land Use* table below). The office land use had 40% of total employment, followed by CIE with 23%, Retail at 18%, PDR at 13%, Private Household with 4%, and Hotel at 3%. PDR was the exceptional land use category, beginning the period with 18% share of employment and ending with 13%. Employment change over the period was generally positive, except for PDR. However, over the past year, PDR jobs actually grew (by 4%) along with jobs with all other land use categories except for Hotel.

Office employment is concentrated mostly in the Financial Commerce and Industry (C&I) district (53%) followed by a secondary concentration in SOMA (25%) (See *Employment Concentration by Land Use* table below). Retail employment is concentrated in SOMA (20%) and Financial (18%) C&I districts, as is PDR employment with 36% in SoMa and 27% in Financial (PDR jobs in the Financial C&I district are likely related to headquarter functions, an office land use, rather than operations, a PDR use). Hotel land uses are concentrated in the Financial (38%) and Civic Center (27%) C&I districts. CIE uses are mostly found in the North Central (33%) C&I district while Private Household uses are concentrated in the Southwest (25%) C&I district.

Employment by Land Use

Land Use Category	Sector Shares			Rate of Change	
	2003	2011	2012	2003-12	2011-12
Office	38%	39%	40%	15%	5.6%
Retail	18%	18%	18%	11%	5.4%
PDR	18%	13%	13%	-19%	4.2%
Hotel	3%	3%	3%	-0.2%	-2.3%
CIE	22%	23%	23%	6%	2.9%
Pvt HH	--	4%	4%	na	8.3%
TOTAL	533,137	559,038	586,257	10%	4.9%

Employment Concentration by Land Use 2012

Land Use Category	C&I Districts	
	Highest Concentration	Next Highest Concentration
Office	Financial (53%)	SoMa (25%)
Retail	SoMa (20%)	Financial (17%)
PDR	SoMa (36%)	Financial (27%)
Hotel	Financial (34%)	Civic Center (28%)
CIE	North Central (32%)	--
Pvt HH	Southwest (25%)	--

ESTABLISHMENTS

San Francisco had 55,471 establishments in 2012, a 0.4% increase over 2011. Approximately 47% of these, or 26,140 establishments, were private households,² 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 28,650 non-household firms make up 53% of San Francisco establishments in 2012. By land use category, 41% are Office land uses, 26% are Retail, 17% are CIE, and 15% are PDR.

In contrast, 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 28% increase in total firms (55,471) between 2003 and 2012 included the downsides of two speculative economic bubbles, and contrasts with employment declines over the same period. Change by land use type reveals establishment losses in retail, PDR, and hotel uses over the period, but substantial gains in office, CIE and private household (6%, 68% and 67%, respectively) outweighed the losses and yielded a 28% gain overall. Over the same period, non-private household establishments increased by six percent.

In terms of firm size, 94% of the non-household SF establishments employ less than 50 workers (see *Establishments 2012 (Non-Private Household)* table below), while 49% employ four or fewer workers. The balance of 6%, or 1,753 firms, employ 50 or more workers. About 3% or 948 firms employ 50-99 workers, 2% or 554 firms employ 100-249 workers, and 1% or 251 firms, employ 250 or more workers.

Establishments

Land Use	Number		Share 2012	Change	
	2003	2012		2003-12	2011-12
Office	11,314	11,938	41%	6%	4%
Retail	7,761	7,666	26%	-1%	2%
PDR	5,122	4,500	15%	-12%	0%
Hotel	339	297	1%	-12%	2%
CIE	3,061	4,930	17%	61%	2%
Subtotal	27,597	29,331	100%	6%	2%
Pvt HH	15,675	26,140	47%	67%	-2%
TOTAL	43,272	55,471	100%	28%	0%

Establishments 2012 (Non-Private Household)

# of Employees	Number of Firms	Share
0-4	14,707	50%
5-49	12,871	45%
50-99	948	3%
100-249	554	2%
250+	251	1%
TOTAL	29,331	100%

MONETARY TRANSACTIONS

Wages

Wage and salary workers in San Francisco earned \$49B in 2012, up 6% from 2011 and 28% from 2003. Total wages followed the larger trend of the economy. Approximately 59% (\$28.9B) of the total is earned by workers in Office land uses with the balance earned by workers in the following land use sectors: 17% to CIE, 14% to PDR, 7% to Retail, and 2% to Hotel. Based on employment, the average wage in San Francisco is \$83,570, with workers in Office land uses earning the highest (\$124,700), followed by workers in PDR uses (\$90,600). Workers in CIE, Hotel, and Retail earning less than the average, at \$63,250, \$42,500, and \$34,250, respectively, and workers in Private Household employment earn the least (\$13,250).

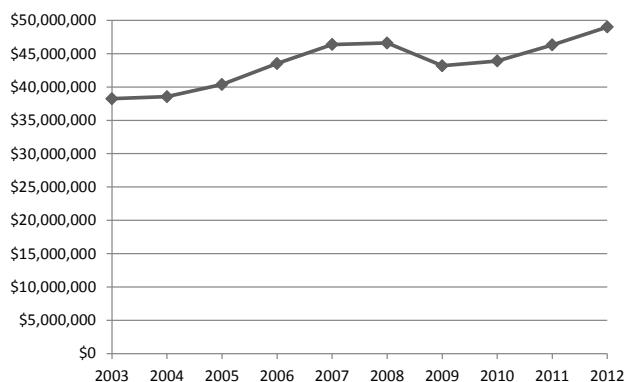
Taxable Retail Sales

Taxable retail sales (all outlets) amounted to \$16B in 2012, a 4% increase over 2011. Changes over time followed the larger economy.

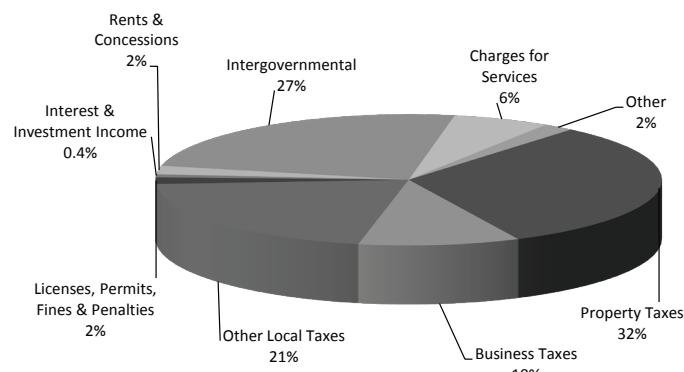
City Revenues and Expenditures

In Fiscal Year 2012 (July 1, 2011 through June 30, 2012), City revenues amounted to \$4.3B, up 3% over 2011. City expenditures were lower than revenues, at \$4.06B, but grew 7% over 2011. Property Taxes were the largest revenue source at 32%, followed by Intergovernmental Transfers at 25%, Other Local Taxes at 21% and Business Taxes at 10%. Public Protection (police and fire) were the highest City expenditures at 27%, with Human Welfare and Neighborhood Development following at 23%, and Community Health the third highest at 16%.

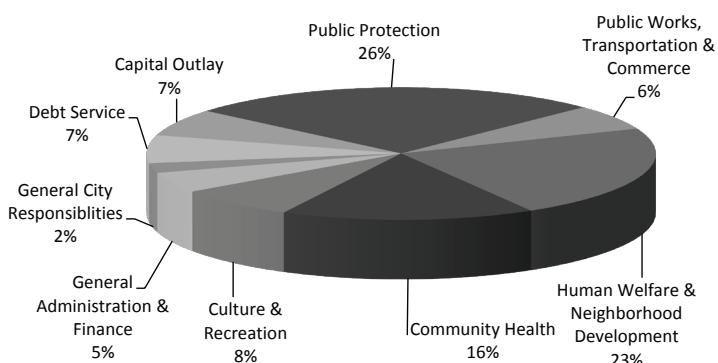
Total Wages 2012 (\$'000s)



City Revenue 2012 (\$4.26 Billion)



City Expenditures 2012 (\$4.06 Billion)



LAND AREA AND BUILDING

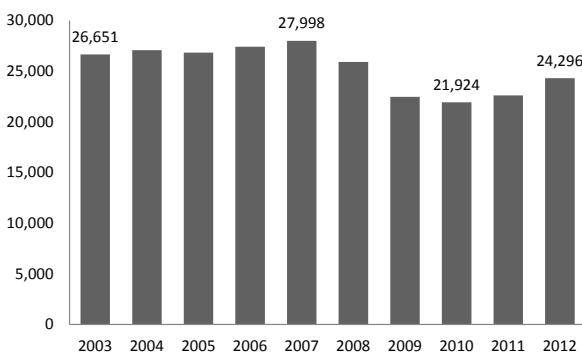
Land Area

San Francisco has 46.9 square miles of land area, of which 71% is developed (988 million square feet), while the remaining 29% are used for streets or freeways. Residential uses form the majority of San Francisco's land use footprint, occupying 42% of the city's land area. At 29%, Public and Open Space are the second biggest land uses, followed by Commercial uses at 17% (6% PDR, 2% Office, 0.4% Hotel, and 7% CIE). Mixed uses occupy 7% of the area while 5% of land area is vacant.

Building Permit Applications

In 2012, there were 24,296 active building permit applications, an increase of 7.5% over 2011, but a 9% drop from 2003 (26,651 permit applications) and 13% below the 2007 peak of 27,998 applications. Approximately 97% of building permit applications were for demolition or alteration projects compared to new construction. Most of the applications were for Residential land uses (68%), with 16% for Office, 11% for Retail, 3% for CIE, and 1% for PDR and Hotel uses. Approximately 63% of active building permit applications completed construction in 2012, with another 30% issued but not yet complete, 0.7% approved but not yet issued, 0.2% cancelled, and 6.3% not yet acted upon, abandoned, reinstated, or appealed (Other). Applications were for projects located mostly in the Southwest (32%), the Financial (14%), and the North Central (13%) C&I districts.

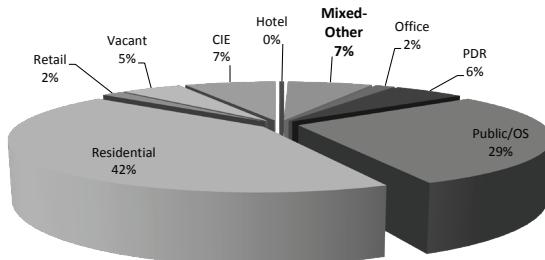
Building Permit Applications



Building Permit Applications by Type 2012

Land Use	Number (Share of 24,296)			Construction Cost (Share of \$4B) (2012 \$ 000s)		
	Total	New	Alterations	Total	New	Alterations
Office	15%	0.04%	16%	28%	20%	36%
Retail	10%	0.04%	11%	8%	3%	12%
PDR	1%	0.02%	1%	0.5%	0%	1%
Hotel	1%	0.00%	1%	1%	0%	2%
CIE	3%	0.06%	3%	8%	5%	12%
Residential	65%	0.64%	68%	53%	67%	31%
Other	5%	0.06%	1%	1%	5%	7%
Total	24,296	200	23,248	\$4,015,383	\$2,339,874	\$1,859,097
Shares	100%	0.82%	97%	100%	58%	32%

Developed Land Area (988M sf)



The total value of building permit applications in terms of estimated construction cost was \$4 billion in 2012, a 106% increase over 2003 (\$1.9B) and a 16% increase from 2011 (\$3.5B). New construction projects construction costs represented 58% or \$2.3B in value compared to \$1.9B, or 42%, for demolition/alteration applications. Approximately 53% of the building permit applications' cost was for residential projects, while 28% was for Office, 8% for retail, 8% for CIE, 1% for Hotel, and 0.5% for PDR projects. The C&I districts with the highest concentration of construction costs were the Financial (27%) and SoMa (24%) districts.

Central Business District (CBD) Office Space

Of the 76 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). Total office space has increased 7% or 4.8 msf in San Francisco since 2003. In the CBD, office space increased about 2% from 2003-2012, or 1.2 msf.

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 2006 and 2012 for workers commuting to San Francisco jobs (from within and outside the city) indicate stability over the period, with small changes in share between the two years. In 2012, 35% of commute trips were made “driving alone,” down 3 points from 38% in 2006. Transit share increased 3 points, from 36% in 2006 to 38% in 2012, while walk and bike trips increased 1.5 points to 10% in 2012.

Private Vehicle Occupancy

Private vehicle occupancy during commute trips for workers commuting to San Francisco jobs (from within and outside the city) decreased from 1.20 in 2004 to 1.14 in 2012, indicating fewer people occupying each vehicle on average, and therefore, more private vehicles used for commuting in 2012 than in 2004.

Parking Entitlements

Project approvals involved the entitlement of 930 net new parking spaces in 2012 located throughout San Francisco and across many zoning districts (see *Table 7.2* in the Appendix for details).

Daily Transit Ridership

Muni ridership increased 1.1% or 7,000 daily trips from 657,000 in 2008 to 664,000 in 2012. The 8x and 9-San Bruno lines were the most used with 59,900 trips, followed by the 38-Geary line with 55,000 trips, the 14-Mission line at 44,200 trips, and the N-Judah at 40,500 trips. Ridership on the San Bruno lines has grown 25% between 2008 and 2012 (see *Table 7.4* in the Appendix for details).

Transit Development Impact Fee

The Transit Impact Development Fee (TIDF) revenue was \$4.6 million in FY2013, up from \$1.7 million in 2011. TIDF revenue varies annually with the economy. Total revenues collected since 1997 amount to \$49.6M over 15 years, or \$3.3M per year on average.

Private Vehicle Occupancy

	2006	2011	2012	2006-2012	2011-2012
Drive Alone	37.7%	37.1%	35%	-2.7%	-2.1%
Carpool/Vanpool	10.5%	9.5%	9.7%	-0.8%	0.2%
Transit	35.8%	36%	38.3%	2.5%	2.3%
Walk	6.9%	7%	7.1%	0.2%	0.1%
Bicycle	1.5%	2.5%	2.7%	1.2%	0.2%
Work at Home	5.4%	5.6%	4.9%	-0.5%	-0.7%
Other	2.2%	2.3%	2.2%	0.0%	-0.1%

Daily Transit Ridership

Route Nos.	Route Name	2008-2012	
		Number	Rate
8X, 8AX, 8BX, 9, 9L	San Bruno	48,008	59,921
38, 38L, 38AX, 38BX	Geary	52,786	55,042
14, 14L, 14X	Mission	42,167	44,162
N	Judah	40,789	40,529
TOTAL		657,364	664,326
			1.1%

APPENDIX: *Data 2012*

1.0 Introduction

1.1 CONTEXT

This is the Data Appendix to the nineteenth *Commerce & Industry Inventory* prepared by the San Francisco Planning Department. It contains the data tables for the calendar year 2012.

This data appendix contains the detailed explanation of the data and methodology traditionally included in the *Commerce & Industry Inventory*.

The immediate goal of this annual Inventory is to make local land use-related economic data available to community groups, businesses, and private and public agencies. The long-term goal is to establish a consistent time series of data on economic activity and compile background information for updating the *Commerce and Industry Element* of the *San Francisco General Plan*.

The analysis of economic trends and policy recommendations regarding economic activity in San Francisco are also contained in various documents published periodically by the San Francisco Planning Department.

This Inventory provides information on economic activities in San Francisco. It includes population, labor force, employment, establishments, wages, retail sales, government expenditures and revenues, and building activity data in San Francisco from 2003 through 2012. In addition, the data for previous years are revised when more accurate information is available during the preparation of this current public document.

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

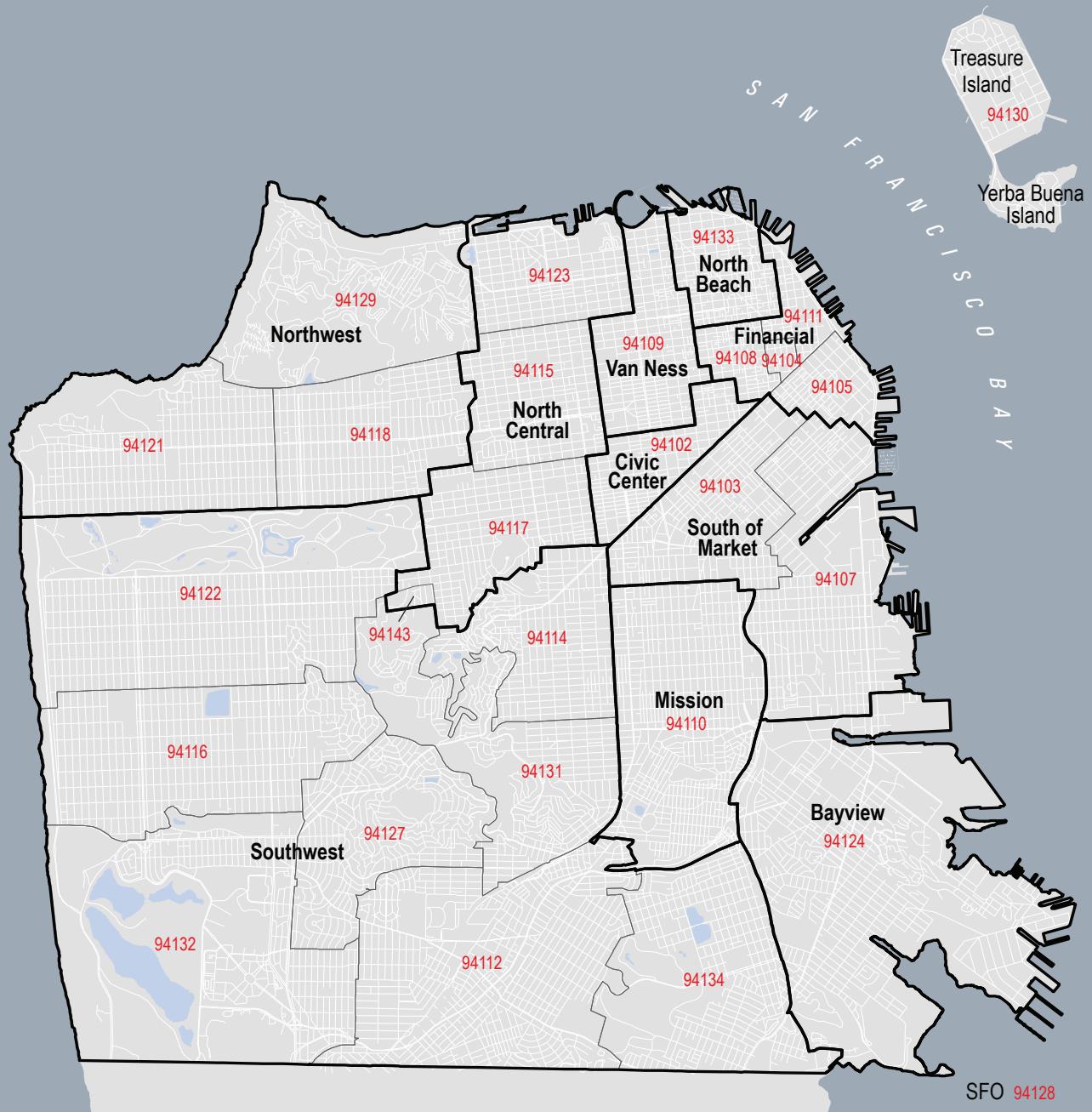
The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. This classification aggregates small zip code based units into 10 large districts encompassing the entire city of San Francisco. 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.



P A C I F I C O C E A N



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** 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.

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>		
	S.N.	Code	Sectors
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>North American Industry Classification System (NAICS)</i>		
<i>Land Use Category</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
<i>Examples:</i> Headquarter offices, professional services, branch banks	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
<i>Examples:</i> Stores, restaurants, bars, commercial parking lots	Other Retail Stores	443, 446, 451 453-454 532
	Personal & Repair	811-812
Production/Distribution/Repair (PDR)	Construction	236-238 488 485, 487
	Transportation and Warehousing	484, 492-493 491 481, 483 486
<i>Examples:</i> Warehouses, factories, workshops showrooms, port, television, telegraph, cable, satellite	Utilities	221 562
	Information	515 517
	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	Accommodation	721
Cultural/Institutional/Educational (CIE)	Art and Recreation	711
	Performing arts, amusement parks	713
	Education Services	611
	Health Care	621-623
<i>Examples:</i> Theaters, museums, hospitals, schools, libraries, churches	Social Assistance	624
	Other CIE Services	712 813
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



Photo by Gunther Haglmaier

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.

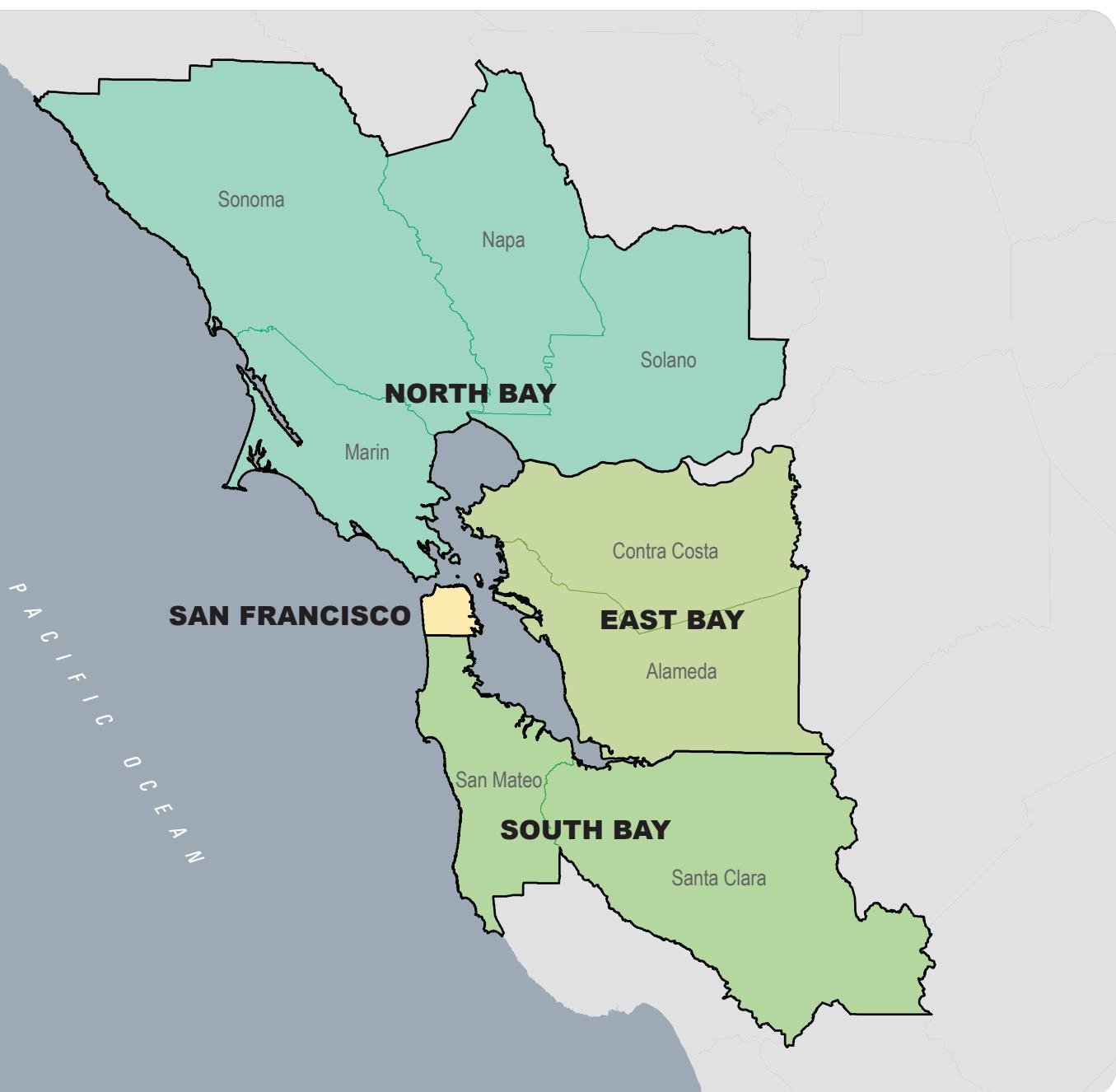
This chapter presents two sets of tables and graphs. The first set describes the residents of each subregion regardless of where they work in terms of population, labor force, number of employed residents, and unemployment. These concepts are described below. For context, unemployment data is also provided 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, 2003-2012

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	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	1,271.0	1,275.6	1,290.6	1,298.5	1,305.3	1,309.5	1,320.7	1,294.7	1,293.8	1,301.2
East Bay	2,501.9	2,505.9	2,539.7	2,568.5	2,594.7	2,617.1	2,647.9	2,577.2	2,597.3	2,623.4
South Bay	2,443.8	2,459.7	2,497.4	2,541.6	2,576.5	2,603.5	2,635.2	2,522.1	2,545.9	2,577.9
San Francisco	792.0	795.0	798.7	808.8	824.5	845.6	856.1	812.1	812.5	825.1
TOTAL	6,968.7	7,036.2	7,126.3	7,217.4	7,301.1	7,375.7	7,459.9	7,205.4	7,249.6	7,327.6

Annual Percentage Distribution

Sub-Region	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	18.2	18.1	18.1	18.0	17.9	17.8	17.7	18.0	17.8	17.8
East Bay	35.9	35.6	35.6	35.6	35.5	35.5	35.5	35.8	35.8	35.8
South Bay	35.1	35.0	35.0	35.2	35.3	35.3	35.3	35.0	35.1	35.2
San Francisco	11.4	11.3	11.2	11.2	11.3	11.5	11.5	11.3	11.2	11.3
TOTAL	100.0									

Percentage Change

Sub-Region	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
North Bay	0.4	1.2	0.6	0.5	0.3	0.9	-2.0	0.0	0.6
East Bay	0.2	1.3	1.1	1.0	0.9	1.2	-2.7	0.8	1.0
South Bay	0.7	1.5	1.8	1.4	1.0	1.2	-4.3	0.9	1.3
San Francisco	0.4	0.5	1.3	1.9	2.6	1.2	-5.1	0.1	1.5
TOTAL	1.0	1.3	1.3	1.2	1.0	1.1	-3.4	0.6	1.1

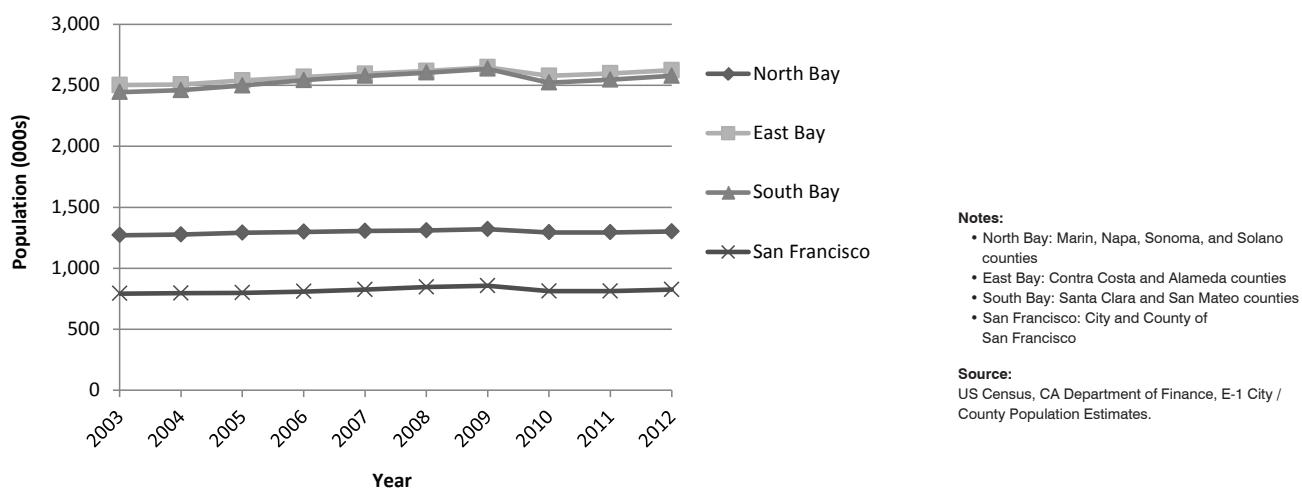


Table & Figure 2.1.2**BAY AREA LABOR FORCE BY SUB-REGION, 2003-2012**

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)

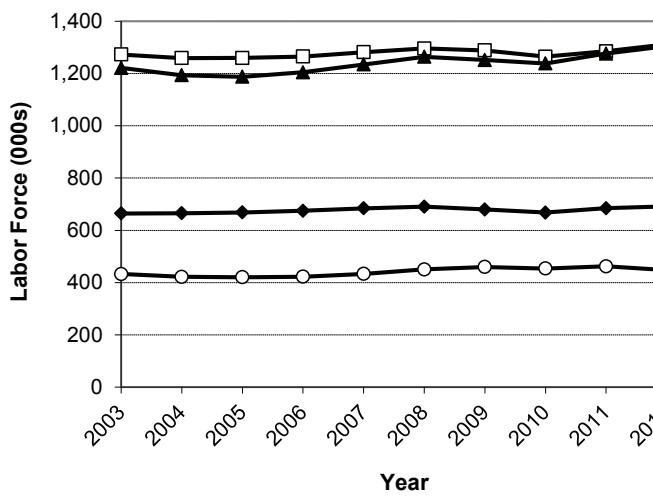
Sub-Region	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	664.7	665.6	668.3	674.9	684.3	690.4	679.9	668.1	684.6	692.0
East Bay	1,272.7	1,259.2	1,259.7	1,265.2	1,281.5	1,295.7	1,288.6	1,264.5	1,285.0	1,311.7
South Bay	1,221.3	1,193.5	1,187.5	1,204.9	1,234.7	1,264.3	1,252.0	1,238.7	1,276.5	1,305.3
San Francisco	433.0	422.3	420.5	422.5	433.3	450.4	459.8	453.8	462.5	447.6
TOTAL	3,591.7	3,540.6	3,536.0	3,567.5	3,633.8	3,700.8	3,680.3	3,625.1	3,708.6	3,756.6

Annual Percentage Distribution

Sub-Region	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	18.5	18.8	18.9	18.9	18.8	18.7	18.5	18.4	18.5	18.4
East Bay	35.4	35.6	35.6	35.5	35.3	35.0	35.0	34.9	34.6	34.9
South Bay	34.0	33.7	33.6	33.8	34.0	34.2	34.0	34.2	34.4	34.7
San Francisco	12.1	11.9	11.9	11.8	11.9	12.2	12.5	12.5	12.5	11.9
TOTAL	100.0									

Percentage Change

Sub-Region	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
North Bay	0.1	0.4	1.0	1.4	0.9	-1.5	-1.7	2.5	1.1
East Bay	-1.1	0.0	0.4	1.3	1.1	-0.5	-1.9	1.6	2.1
South Bay	-2.3	-0.5	1.5	2.5	2.4	-1.0	-1.1	3.1	2.3
San Francisco	-2.5	-0.4	0.5	2.6	3.9	2.1	-1.3	1.9	-3.2
TOTAL	-1.4	-0.1	0.9	1.9	1.8	-0.6	-1.5	2.3	1.3



- North Bay
- East Bay
- South Bay
- San Francisco

Notes:

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

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

Table & Figure 2.1.3**BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 2003-2012**

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	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	631.4	637.6	646.7	653.2	650.3	614.7	596.8	596.8	617.9	633.1
East Bay	1,186.4	1,196.2	1,209.7	1,220.6	1,215.5	1,153.0	1,124.4	1,124.4	1,151.6	1,193.5
South Bay	1,120.5	1,126.8	1,153.7	1,179.7	1,193.3	1,123.6	1,116.4	1,116.4	1,159.5	1,202.2
San Francisco	397.1	399.0	404.7	414.6	426.7	418.4	410.7	410.7	422.7	442.8
TOTAL	3,335.4	3,359.6	3,414.8	3,468.1	3,485.8	3,309.7	3,248.3	3,248.3	3,351.7	3,471.6

Annual Percentage Distribution

Sub-Region	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	18.9	19.0	18.9	18.8	18.7	18.6	18.4	18.4	18.4	18.2
East Bay	35.6	35.6	35.4	35.2	34.9	34.8	34.6	34.6	34.4	34.4
South Bay	33.6	33.5	33.8	34.0	34.2	33.9	34.4	34.4	34.6	34.6
San Francisco	11.9	11.9	11.9	12.0	12.2	12.6	12.6	12.6	12.6	12.8
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	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
North Bay	1.0	1.4	1.0	-0.4	-5.5	-2.9	0.0	3.5	2.5
East Bay	0.8	1.1	0.9	-0.4	-5.1	-2.5	0.0	2.4	3.6
South Bay	0.6	2.4	2.3	1.2	-5.8	-0.6	0.0	3.9	3.7
San Francisco	0.5	1.4	2.4	2.9	-1.9	-1.8	0.0	2.9	4.8
TOTAL	0.7	1.6	1.6	0.5	-5.1	-1.9	0.0	3.2	3.6

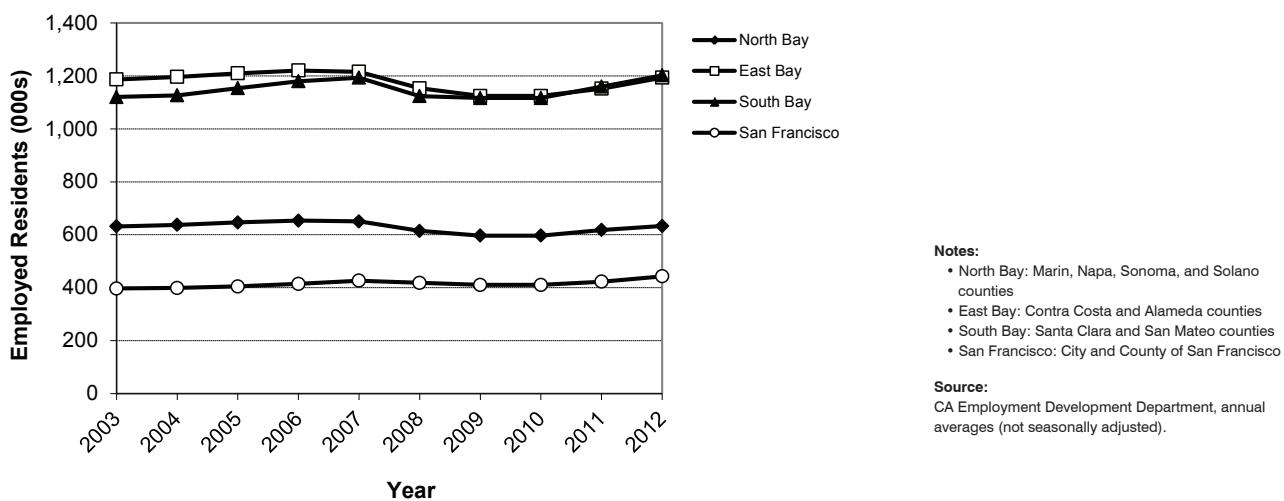


Table 2.1.4**BAY AREA UNEMPLOYMENT BY SUB-REGION, 2003-2012**

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>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	37.0	34.2	30.7	28.2	31.1	39.9	65.3	69.8	66.6	59.0
East Bay	84.3	72.8	63.5	55.5	60.9	80.1	135.6	140.2	133.4	118.2
South Bay	94.2	73.0	60.7	51.2	55.0	70.9	128.4	122.2	117.0	103.1
San Francisco	29.8	25.2	21.5	17.8	18.7	23.7	41.5	43.2	39.8	34.9
TOTAL	245.3	205.2	176.4	152.7	165.7	214.6	370.8	375.4	356.8	315.2

Annual Percentage Distribution

<i>Sub-Region</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	15.1	16.7	17.4	18.5	18.8	18.6	17.6	18.6	18.7	18.7
East Bay	34.4	35.5	36.0	36.3	36.8	37.3	36.6	37.3	37.4	37.5
South Bay	38.4	35.6	34.4	33.5	33.2	33.0	34.6	32.6	32.8	32.7
San Francisco	12.1	12.3	12.2	11.7	11.3	11.0	11.2	11.5	11.2	11.1
TOTAL	100.0									

Percentage Change

<i>Sub-Region</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
North Bay	-7.6	-10.2	-8.1	10.3	28.3	63.7	6.9	-4.6	-11.4
East Bay	-13.6	-12.8	-12.6	9.7	31.5	69.3	3.4	-4.9	-11.4
South Bay	-22.5	-16.8	-15.7	7.4	28.9	81.1	-4.8	-4.3	-11.9
San Francisco	-15.4	-14.7	-17.2	5.1	26.7	75.1	4.1	-7.9	-12.3
TOTAL	-16.3	-14.0	-13.4	8.5	29.5	72.8	1.2	-5.0	-11.7

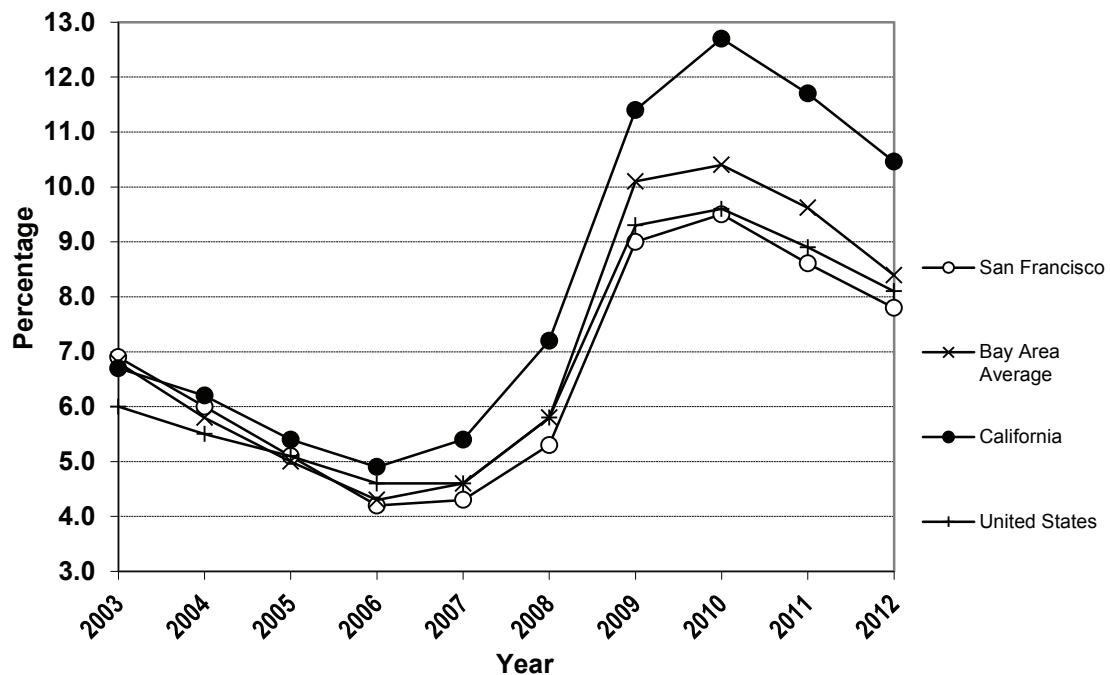
Average Annual Rate

<i>Sub-Region</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	5.6	5.1	4.6	4.2	4.5	5.8	9.6	10.4	9.7	8.5
East Bay	6.6	5.8	5.0	4.4	4.8	6.2	10.5	11.1	10.4	9.0
South Bay	7.7	6.1	5.1	4.2	4.5	5.6	10.3	9.9	9.2	7.9
San Francisco	6.9	6.0	5.1	4.2	4.3	5.3	9.0	9.5	8.6	7.8
Average	6.8	5.8	5.0	4.3	4.6	5.8	10.1	10.4	9.6	8.4

Average Annual Rate

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
California	6.7	6.2	5.4	4.9	5.4	7.2	11.4	12.7	11.7	10.5
United States	6.0	5.5	5.1	4.6	4.6	5.8	9.3	9.6	8.9	8.1

Figure 2.1.4
BAY AREA UNEMPLOYMENT RATE BY SUB-REGION, 2003-2012

**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, 2003-2012

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

Number of Jobs (000s)

<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Farm	25.8	25.4	22.5	20.2	20.6	20.2	20.1	19.0	18.7	18.9
Natural Resources, Mining & Construction	191.1	187.6	194.2	196.0	194.7	179.6	143.7	131.5	110.3	116.1
Manufacturing	370.8	361.9	353.8	352.0	345.0	344.9	313.9	305.4	310.5	312.1
Trade, Transportation & Utilities	566.4	558.4	562.5	564.1	571.3	563.5	518.6	509.2	513.3	527.8
Information	117.0	114.0	112.4	112.5	113.3	114.5	110.7	110.8	117.2	122.4
Financial Activities	211.5	209.2	213.3	213.4	206.1	193.5	179.3	170.4	170.4	175.0
Professional & Business Services	517.0	518.1	529.7	549.8	572.4	588.6	542.6	546.5	560.9	605.8
Educational & Health Services	355.6	358.6	362.3	373.1	380.0	391.4	394.5	409.7	415.0	425.2
Leisure & Hospitality	302.9	306.7	312.3	322.0	329.9	335.7	322.0	323.1	333.1	352.2
Other Services	112.8	111.2	110.4	109.8	111.5	112.5	107.2	108.8	110.3	112.9
Government	476.6	467.4	471.1	473.2	485.8	477.7	472.5	454.5	449.8	447.7
TOTAL	3,247.5	3,218.5	3,244.5	3,286.1	3,330.6	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1

Annual Percentage Distribution

<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Farm	0.8	0.8	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Natural Resources, Mining & Construction	5.9	5.8	6.0	6.0	5.8	5.4	4.6	4.3	3.5	3.6
Manufacturing	11.4	11.2	10.9	10.7	10.4	10.4	10.0	9.9	10.0	9.7
Trade, Transportation & Utilities	17.4	17.3	17.3	17.2	17.2	17.0	16.6	16.5	16.5	16.4
Information	3.6	3.5	3.5	3.4	3.4	3.4	3.5	3.6	3.8	3.8
Financial Activities	6.5	6.5	6.6	6.5	6.2	5.8	5.7	5.5	5.5	5.4
Professional & Business Services	15.9	16.1	16.3	16.7	17.2	17.7	17.4	17.7	18.0	18.8
Educational & Health Services	10.9	11.1	11.2	11.4	11.4	11.8	12.6	13.3	13.3	13.2
Leisure & Hospitality	9.3	9.5	9.6	9.8	9.9	10.1	10.3	10.5	10.7	11.0
Other Services	3.5	3.5	3.4	3.3	3.3	3.4	3.4	3.5	3.5	3.5
Government	14.7	14.5	14.5	14.4	14.6	14.4	15.1	14.7	14.5	13.9
TOTAL	100.0									

Percentage Change

<i>Industry Group</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Farm	-1.6	-11.4	-10.2	2.0	-1.9	-0.5	-5.5	-1.6	1.1
Natural Resources, Mining & Construction	-1.8	3.5	0.9	-0.7	-7.8	-20.0	-8.5	-16.1	5.3
Manufacturing	-2.4	-2.2	-0.5	-2.0	0.0	-9.0	-2.7	1.7	0.5
Trade, Transportation & Utilities	-1.4	0.7	0.3	1.3	-1.4	-8.0	-1.8	0.8	2.8
Information	-2.6	-1.4	0.1	0.7	1.1	-3.3	0.1	5.8	4.4
Financial Activities	-1.1	2.0	0.0	-3.4	-6.1	-7.3	-5.0	0.0	2.7
Professional & Business Services	0.2	2.2	3.8	4.1	2.8	-7.8	0.7	2.6	8.0
Educational & Health Services	0.8	1.0	3.0	1.8	3.0	0.8	3.9	1.3	2.5
Leisure & Hospitality	1.3	1.8	3.1	2.5	1.8	-4.1	0.3	3.1	5.7
Other Services	-1.4	-0.7	-0.5	1.5	0.9	-4.7	1.5	1.4	2.4
Government	-1.9	0.8	0.4	2.7	-1.7	-1.1	-3.8	-1.0	-0.5
TOTAL	-0.9	0.8	1.3	1.4	-0.3	-5.9	-1.2	0.7	3.4

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, 2003-2012 – 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>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	499.2	494.0	497.0	501.9	503.4	497.8	467.3	459.2	453.8	461.9
East Bay	1,028.6	1,024.1	1,035.7	1,047.8	1,049.5	1,031.1	968.0	949.8	950.6	978.7
South Bay	1,206.6	1,196.6	1,202.6	1,215.5	1,238.2	1,243.8	1,165.5	1,158.2	1,178.6 ¹	1,217.6
San Francisco	513.1	503.8	509.2	520.9	539.5	549.4	524.3	521.7	526.5	557.9
Regional Total	3,247.5	3,218.5	3,244.5	3,286.1	3,330.6	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1

Farm

North Bay	13.3	13.5	12.5	12.7	13.1	12.8	12.9	12.0	12.0	12.4
East Bay	3.0	2.6	1.5	1.5	1.6	1.4	1.5	1.5	1.5	1.4
South Bay	9.2	8.9	8.4	5.7	5.7	5.7	5.4	5.3	5.0	4.9
San Francisco	0.3	0.4	0.1	0.3	0.2	0.3	0.3	0.2	0.2	0.2
Regional Total	25.8	25.4	22.5	20.2	20.6	20.2	20.1	19.0	18.7	18.9

Natural Resources, Mining & Construction

North Bay	46.0	39.5	41.6	41.0	38.5	34.5	26.8	24.6	16.9	17.0
East Bay	68.0	70.3	75.1	74.6	73.6	65.8	54.7	48.7	48.5	50.6
South Bay	59.8	60.9	60.8	62.9	64.3	60.9	46.9	44.1	30.8	34.4
San Francisco	17.3	16.9	16.7	17.5	18.3	18.4	15.3	14.1	14.1	14.1
Regional Total	191.1	187.6	194.2	196.0	194.7	179.6	143.7	131.5	110.3	116.1

Manufacturing

North Bay	47.9	47.3	46.8	46.6	45.8	45.5	42.0	41.3	41.8	42.9
East Bay	98.0	99.1	95.4	96.9	93.7	93.3	82.5	78.6	79.1	80.3
South Bay	211.8	203.3	199.8	197.4	194.4	195.3	180.1	176.8	181.0	179.6
San Francisco ¹	13.1	12.2	11.8	11.1	11.1	10.8	9.3	8.7	8.6	8.6
Regional Total	370.8	361.9	353.8	352.0	345.0	344.9	313.9	305.4	310.5	311.4

Trade, Transportation & Utilities

North Bay	89.3	89.4	90.1	90.6	91.3	89.4	82.3	82.2	83.4	85.4
East Bay	197.2	192.8	195.2	195.4	198.1	195.3	179.0	173.8	174.0	179.0
South Bay	208.7	206.5	207.2	208.4	212.7	210.9	193.7	191.2	193.5	198.4
San Francisco	71.2	69.7	70.0	69.7	69.2	67.9	63.6	62.0	62.4	65.0
Regional Total	566.4	558.4	562.5	564.1	571.3	563.5	518.6	509.2	513.3	527.8

Information

North Bay	10.0	9.8	9.1	7.7	7.7	7.4	7.0	6.6	6.8	7.1
East Bay	32.6	31.0	30.4	29.8	29.4	27.8	25.1	23.8	22.7	22.0
South Bay	53.9	53.7	55.3	56.9	56.8	60.2	59.1	61.2	66.8	69.6
San Francisco	20.5	19.5	17.6	18.1	19.4	19.1	19.5	19.2	20.9	23.7
Regional Total	117.0	114.0	112.4	112.5	113.3	114.5	110.7	110.8	117.2	122.4

1. Data Correction, Total Employment, South Bay, 2011, change from 1,475.9 to 1,178.6.

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Financial Activities

<i>Sub-Region</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	28.5	27.8	27.9	28.0	26.5	24.3	22.8	21.4	22.1	21.8
East Bay	67.7	67.2	70.5	69.0	62.3	56.7	52.6	48.4	47.2	48.4
South Bay	56.2	56.5	57.4	58.4	58.3	54.8	50.5	49.0	50.8	53.3
San Francisco	59.1	57.7	57.5	58.0	59.0	57.7	53.4	51.6	50.3	51.5
Regional Total	211.5	209.2	213.3	213.4	206.1	193.5	179.3	170.4	170.4	175.0

Professional & Business Services

North Bay	53.2	55.3	55.4	58.8	60.2	59.9	53.9	56.7	53.1	51.2
East Bay	144.9	146.7	150.6	155.0	155.5	161.4	148.5	148.1	154.3	165.0
South Bay	215.5	215.6	218.9	225.0	239.4	242.2	221.9	221.7	232.8	250.7
San Francisco	103.4	100.5	104.8	111.0	117.3	125.1	118.3	120.0	120.7	138.9
Regional Total	517.0	518.1	529.7	549.8	572.4	588.6	542.6	546.5	560.9	605.8

Educational & Health Services

North Bay	61.8	61.7	62.1	63.0	64.2	66.2	66.4	67.4	67.4	70.0
East Bay	117.0	117.9	118.6	121.9	124.7	127.7	130.0	139.7	137.5	141.1
South Bay	123.6	125.2	127.0	132.2	133.6	139.4	140.2	144.0	151.1	153.0
San Francisco	53.2	53.8	54.6	56.0	57.5	58.1	57.9	58.6	59.0	61.1
Regional Total	355.6	358.6	362.3	373.1	380.0	391.4	394.5	409.7	415.0	425.2

Leisure & Hospitality

North Bay	53.6	54.0	54.2	54.9	56.3	57.0	54.6	54.2	56.3	59.8
East Bay	80.4	80.6	82.6	85.7	87.5	89.1	85.2	85.6	87.3	92.0
South Bay	99.3	101.6	103.7	107.4	109.7	111.0	106.5	106.8	110.6	117.7
San Francisco	69.6	70.5	71.8	74.0	76.4	78.6	75.7	76.5	78.9	82.7
Regional Total	302.9	306.7	312.3	322.0	329.9	335.7	322.0	323.1	333.1	352.2

Other Services

North Bay	16.9	17.2	16.8	17.0	17.0	17.4	16.3	16.5	16.3	17.2
East Bay	37.5	37.0	35.8	35.9	36.2	36.0	34.3	34.5	36.0	36.1
South Bay	36.7	36.0	36.1	35.5	36.4	36.8	35.3	36.3	36.1	37.1
San Francisco	21.7	21.0	21.7	21.4	21.9	22.3	21.3	21.5	21.9	22.5
Regional Total	112.8	111.2	110.4	109.8	111.5	112.5	107.2	108.8	110.3	112.9

Government

North Bay	78.7	78.5	80.5	81.6	82.8	83.4	82.3	76.3	77.7	77.1
East Bay	182.3	178.9	180.0	182.1	186.9	176.6	174.6	167.1	162.5	162.8
South Bay	131.9	128.4	128.0	125.7	126.9	126.6	125.9	121.8	120.1	118.9
San Francisco	83.7	81.6	82.6	83.8	89.2	91.1	89.7	89.3	89.5	88.9
Regional Total	476.6	467.4	471.1	473.2	485.8	477.7	472.5	454.5	449.8	447.7

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, 2003-2012 – 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>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	15.4	15.3	15.3	15.3	15.1	15.0	15.0	14.9	14.6	14.4
East Bay	31.7	31.8	31.9	31.9	31.5	31.0	31.0	30.7	30.6	30.4
South Bay	37.2	37.2	37.1	37.0	37.2	37.4	37.3	37.5	37.9	37.9
San Francisco	15.8	15.7	15.7	15.9	16.2	16.5	16.8	16.9	16.9	17.3
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	51.6	53.1	55.6	62.9	63.6	63.4	64.2	63.2	64.2	65.6
East Bay	11.6	10.2	6.7	7.4	7.8	6.9	7.5	7.9	8.0	7.4
South Bay	35.7	35.0	37.3	28.2	27.7	28.2	26.9	27.9	26.7	25.9
San Francisco	1.2	1.6	0.4	1.5	1.0	1.5	1.5	1.1	1.1	1.1
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	24.1	21.1	21.4	20.9	19.8	19.2	18.6	18.7	15.3	14.6
East Bay	35.6	37.5	38.7	38.1	37.8	36.6	38.1	37.0	44.0	43.6
South Bay	31.3	32.5	31.3	32.1	33.0	33.9	32.6	33.5	27.9	29.6
San Francisco ¹	9.1	9.0	8.6	8.9	9.4	10.2	10.6	10.7	12.8	12.1
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	12.9	13.1	13.2	13.2	13.3	13.2	13.4	13.5	13.5	13.8
East Bay	26.4	27.4	27.0	27.5	27.2	27.1	26.3	25.7	25.5	25.8
South Bay	57.1	56.2	56.5	56.1	56.3	56.6	57.4	57.9	58.3	57.7
San Francisco	3.5	3.4	3.3	3.2	3.2	3.1	3.0	2.8	2.8	2.8
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	15.8	16.0	16.0	16.1	16.0	15.9	15.9	16.1	16.2	16.2
East Bay	34.8	34.5	34.7	34.6	34.7	34.7	34.5	34.1	33.9	33.9
South Bay	36.8	37.0	36.8	36.9	37.2	37.4	37.4	37.5	37.7	37.6
San Francisco	12.6	12.5	12.4	12.4	12.1	12.0	12.3	12.2	12.2	12.3
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	8.5	8.6	8.1	6.8	6.8	6.5	6.3	6.0	5.8	5.8
East Bay	27.9	27.2	27.0	26.5	25.9	24.3	22.7	21.5	19.4	18.0
South Bay	46.1	47.1	49.2	50.6	50.1	52.6	53.4	55.2	57.0	56.9
San Francisco	17.5	17.1	15.7	16.1	17.1	16.7	17.6	17.3	17.8	19.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

1. Data Correction, 020713, Manufacturing, San Francisco, 2011, change from 6.1 percent to 2.5 percent.

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Financial Activities

<i>Sub-Region</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
North Bay	13.5	13.3	13.1	13.1	12.9	12.6	12.7	12.6	13.0	12.5
East Bay	32.0	32.1	33.1	32.3	30.2	29.3	29.3	28.4	27.7	27.7
South Bay	26.6	27.0	26.9	27.4	28.3	28.3	28.2	28.8	29.8	30.5
San Francisco	27.9	27.6	27.0	27.2	28.6	29.8	29.8	30.3	29.5	29.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Professional & Business Services

North Bay	10.3	10.7	10.5	10.7	10.5	10.2	9.9	10.4	9.5	8.5
East Bay	28.0	28.3	28.4	28.2	27.2	27.4	27.4	27.1	27.5	27.2
South Bay	41.7	41.6	41.3	40.9	41.8	41.1	40.9	40.6	41.5	41.4
San Francisco	20.0	19.4	19.8	20.2	20.5	21.3	21.8	22.0	21.5	22.9
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	17.4	17.2	17.1	16.9	16.9	16.9	16.8	16.5	16.2	16.5
East Bay	32.9	32.9	32.7	32.7	32.8	32.6	33.0	34.1	33.1	33.2
South Bay	34.8	34.9	35.1	35.4	35.2	35.6	35.5	35.1	36.4	36.0
San Francisco	15.0	15.0	15.1	15.0	15.1	14.8	14.7	14.3	14.2	14.4
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	17.7	17.6	17.4	17.0	17.1	17.0	17.0	16.8	16.9	17.0
East Bay	26.5	26.3	26.4	26.6	26.5	26.5	26.5	26.5	26.2	26.1
South Bay	32.8	33.1	33.2	33.4	33.3	33.1	33.1	33.1	33.2	33.4
San Francisco	23.0	23.0	23.0	23.0	23.2	23.4	23.5	23.7	23.7	23.5
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	15.0	15.5	15.2	15.5	15.2	15.5	15.2	15.2	14.8	15.2
East Bay	33.2	33.3	32.4	32.7	32.5	32.0	32.0	31.7	32.6	32.0
South Bay	32.5	32.4	32.7	32.3	32.6	32.7	32.9	33.4	32.7	32.9
San Francisco	19.2	18.9	19.7	19.5	19.6	19.8	19.9	19.8	19.9	19.9
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Government

North Bay	16.5	16.8	17.1	17.2	17.0	17.5	17.4	16.8	17.3	17.2
East Bay	38.3	38.3	38.2	38.5	38.5	37.0	37.0	36.8	36.1	36.4
South Bay	27.7	27.5	27.2	26.6	26.1	26.5	26.6	26.8	26.7	26.6
San Francisco	17.6	17.5	17.5	17.7	18.4	19.1	19.0	19.6	19.9	19.9
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, 2003-2012 – 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>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
North Bay	-1.0	0.6	1.0	0.3	-1.1	-6.1	-1.7	-1.2	1.8
East Bay	-0.4	1.1	1.2	0.2	-1.8	-6.1	-1.9	0.1	3.0
South Bay	-0.8	0.5	1.1	1.9	0.5	-6.3	-0.6	1.8	3.3
San Francisco	-1.8	1.1	2.3	3.6	1.8	-4.6	-0.5	0.9	6.0
Regional Total	-0.9	0.8	1.3	1.4	-0.3	-5.9	-1.2	0.7	3.4

Farm

North Bay	1.5	-7.4	1.6	3.1	-2.3	0.8	-7.0	0.0	3.3
East Bay	-13.3	-42.3	0.0	6.7	-12.5	7.1	0.0	0.0	-6.7
South Bay	-3.3	-5.6	-32.1	0.0	0.0	-5.3	-1.9	-5.7	-2.0
San Francisco	33.3	-75.0	200.0	-33.3	50.0	0.0	-33.3	0.0	0.0
Regional Total	-1.6	-11.4	-10.2	2.0	-1.9	-0.5	-5.5	-1.6	1.1

Natural Resources, Mining & Construction

North Bay	-14.1	5.3	-1.4	-6.1	-10.4	-22.3	-8.2	-31.3	0.6
East Bay	3.4	6.8	-0.7	-1.3	-10.6	-16.9	-11.0	-0.4	4.3
South Bay	1.8	-0.2	3.5	2.2	-5.3	-23.0	-6.0	-30.2	11.7
San Francisco	-2.3	-1.2	4.8	4.6	0.5	0.0	0.0	0.0	0.0
Regional Total	-1.8	3.5	0.9	-0.7	-7.8	-20.0	-8.5	-16.1	5.3

Manufacturing

North Bay	-1.3	-1.1	-0.4	-1.7	-0.7	-7.7	-1.7	1.2	2.6
East Bay	1.1	-3.7	1.6	-3.3	-0.4	-11.6	-4.7	0.6	1.5
South Bay	-4.0	-1.7	-1.2	-1.5	0.5	-7.8	-1.8	2.4	-0.8
San Francisco ¹	-6.9	-3.3	-5.9	0.0	-2.7	-13.9	-6.5	-1.1	0.0
Regional Total	-2.4	-2.2	-0.5	-2.0	0.0	-9.0	-2.7	1.7	0.3

Trade, Transportation & Utilities

North Bay	0.1	0.8	0.6	0.8	-2.1	-7.9	-0.1	1.5	2.4
East Bay	-2.2	1.2	0.1	1.4	-1.4	-8.3	-2.9	0.1	2.9
South Bay	-1.1	0.3	0.6	2.1	-0.8	-8.2	-1.3	1.2	2.5
San Francisco	-2.1	0.4	-0.4	-0.7	-1.9	-6.3	-2.5	0.6	4.2
Regional Total	-1.4	0.7	0.3	1.3	-1.4	-8.0	-1.8	0.8	2.8

Information

North Bay	-2.0	-7.1	-15.4	0.0	-3.9	-5.4	-5.7	3.0	4.4
East Bay	-4.9	-1.9	-2.0	-1.3	-5.4	-9.7	-5.2	-4.6	-3.1
South Bay	-0.4	3.0	2.9	-0.2	6.0	-1.8	3.6	9.2	4.2
San Francisco	-4.9	-9.7	2.8	7.2	-1.5	2.1	-1.5	8.9	13.4
Regional Total	-2.6	-1.4	0.1	0.7	1.1	-3.3	0.1	5.8	4.4

1. Data Correction, 020713, Manufacturing, San Francisco, 2011, change from 152.9 percent to -1.1 percent.

CONTINUED >

Financial Activities

<i>Sub-Region</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
North Bay	-2.5	0.4	0.4	-5.4	-8.3	-6.2	-6.1	3.3	-1.4
East Bay	-0.7	4.9	-2.1	-9.7	-9.0	-7.2	-8.0	-2.5	2.5
South Bay	0.5	1.6	1.7	-0.2	-6.0	-7.8	-3.0	3.7	4.9
San Francisco	-2.4	-0.3	0.9	1.7	-2.2	-7.5	-3.4	-2.5	2.4
Regional Total	-1.1	2.0	0.0	-3.4	-6.1	-7.3	-5.0	0.0	2.7

Professional & Business Services

North Bay	3.9	0.2	6.1	2.4	-0.5	-10.0	5.2	-6.3	-3.6
East Bay	1.2	2.7	2.9	0.3	3.8	-8.0	-0.3	4.2	6.9
South Bay	0.0	1.5	2.8	6.4	1.2	-8.4	-0.1	5.0	7.7
San Francisco	-2.8	4.3	5.9	5.7	6.6	-5.4	1.4	0.6	15.1
Regional Total	0.2	2.2	3.8	4.1	2.8	-7.8	0.7	2.6	8.0

Educational & Health Services

North Bay	-0.2	0.6	1.4	1.9	3.1	0.3	1.5	0.0	3.9
East Bay	0.8	0.6	2.8	2.3	2.4	1.8	7.5	-1.6	2.6
South Bay	1.3	1.4	4.1	1.1	4.3	0.6	2.7	4.9	1.3
San Francisco	1.1	1.5	2.6	2.7	1.0	-0.3	1.2	0.7	3.6
Regional Total	0.8	1.0	3.0	1.8	3.0	0.8	3.9	1.3	2.5

Leisure & Hospitality

North Bay	0.7	0.4	1.3	2.6	1.2	-4.2	-0.7	3.9	6.2
East Bay	0.2	2.5	3.8	2.1	1.8	-4.4	0.5	2.0	5.4
South Bay	2.3	2.1	3.6	2.1	1.2	-4.1	0.3	3.6	6.4
San Francisco	1.3	1.8	3.1	3.2	2.9	-3.7	1.1	3.1	4.8
Regional Total	1.3	1.8	3.1	2.5	1.8	-4.1	0.3	3.1	5.7

Other Services

North Bay	1.8	-2.3	1.2	0.0	2.4	-6.3	1.2	-1.2	5.5
East Bay	-1.3	-3.2	0.3	0.8	-0.6	-4.7	0.6	4.3	0.3
South Bay	-1.9	0.3	-1.7	2.5	1.1	-4.1	2.8	-0.6	2.8
San Francisco	-3.2	3.3	-1.4	2.3	1.8	-4.5	0.9	1.9	2.7
Regional Total	-1.4	-0.7	-0.5	1.5	0.9	-4.7	1.5	1.4	2.4

Government

North Bay	-0.3	2.5	1.4	1.5	0.7	-1.3	-7.3	1.8	-0.8
East Bay	-1.9	0.6	1.2	2.6	-5.5	-1.1	-4.3	-2.8	0.2
South Bay	-2.7	-0.3	-1.8	1.0	-0.2	-0.6	-3.3	-1.4	-1.0
San Francisco	-2.5	1.2	1.5	6.4	2.1	-1.5	-0.4	0.2	-0.7
Regional Total	-1.9	0.8	0.4	2.7	-1.7	-1.1	-3.8	-1.0	-0.5

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



Photo by Steven Guzzardi

3.0 Employment

This chapter provides information about the employment trends in San Francisco from 2003 to 2012. 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 2005 according to the City of San Francisco's Office of the Treasurer and Tax Collector. The EDD wage and salary employment data also do not include unpaid family workers, volunteers, or persons involved in trade disputes.

Employment data is reported both for the entire city and the city's ten Commerce and Industry Districts under five Land Use categories - Office, Retail, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). 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 2003 to 2012. *Tables 3.2.1* through *3.2.4* show employment data by Industry Group within each Land Use Category in San Francisco from 2003 to 2012. *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 2012. 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, 2003-2012

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 been added in 2009. These jobs were previously counted under CIE. Data is presented from 2009-2012 (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 in 2012) 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 2003-2005, annual average includes last quarter of previous year, and first three quarters of current year.

Sources:

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

Annual Average Number of Jobs

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	201,492	193,180	195,521	206,271	214,661	221,250	211,885	211,050	218,837	231,908
Retail	95,599	95,006	96,033	98,294	102,253	103,443	98,278	98,139	100,598	106,305
PDR	93,726	89,037	84,693	81,699	84,986	84,710	76,727	72,967	72,466	75,637
Hotel	17,438	18,090	18,424	19,087	19,070	19,527	17,828	17,568	17,795	17,400
CIE	124,882	127,962	128,726	130,645	135,361	141,848	124,831	126,208	129,015	132,851
Pvt HH	-	-	-	-	-	-	-	19,443	19,819	20,327
TOTAL	533,137	523,275	523,397	535,996	556,330	570,778	548,992	545,751	559,038	586,257

Annual Percentage Distribution

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	37.8	36.9	37.4	38.5	38.6	38.8	38.6	38.7	39.1	39.6
Retail	17.9	18.2	18.3	18.3	18.4	18.1	17.9	18.0	18.0	18.1
PDR	17.6	17.0	16.2	15.2	15.3	14.8	14.0	13.4	13.0	12.9
Hotel	3.3	3.5	3.5	3.6	3.4	3.4	3.2	3.2	3.2	3.0
CIE	23.4	24.5	24.6	24.4	24.3	24.9	22.7	23.1	23.1	22.7
Pvt HH	-	-	-	-	-	-	-	3.6	3.6	3.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	96.5	100.0	100.0	100.0

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	-4.1	1.2	5.5	4.1	3.1	-4.2	-0.4	3.7	6.0
Retail	-0.6	1.1	2.4	4.0	1.2	-5.0	-0.1	2.5	5.7
PDR	-5.0	-4.9	-3.5	4.0	-0.3	-9.4	-4.9	-0.7	4.4
Hotel	3.7	1.8	3.6	-0.1	2.4	-8.7	-1.5	1.3	-2.2
CIE	2.5	0.6	1.5	3.6	4.8	-12.0	1.1	2.2	3.0
Pvt HH	-	-	-	-	-	-	1.9	2.6	9.0
TOTAL	-1.8	0.0	2.4	3.8	2.6	-3.8	-0.6	2.4	4.9

Figure 3.1.1
SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2012

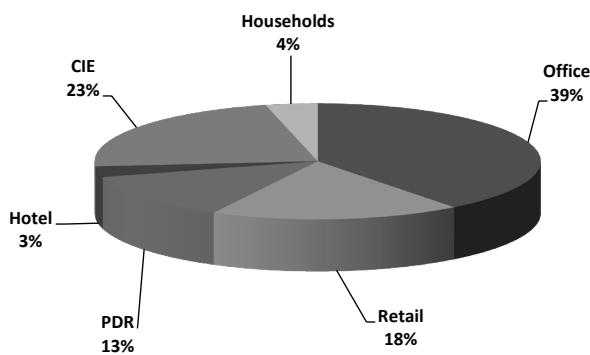


Figure 3.1.2
SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2003-2012

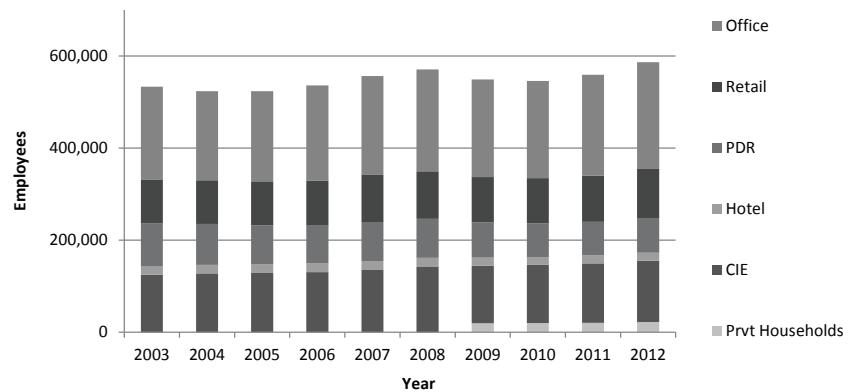


Table & Figure 3.2.1
OFFICE EMPLOYMENT BY INDUSTRY GROUP, 2003-2012

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	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Agriculture	404	385	228	241	220	251	330	357	272	184
Finance	35,314	33,748	33,554	34,239	34,975	33,033	30,313	28,742	28,316	29,048
Insurance	12,897	12,527	12,174	11,962	12,249	12,003	10,799	9,796	9,729	9,512
Real Estate	10,177	9,910	10,033	10,316	10,704	10,739	10,146	10,206	10,126	10,554
Office Services	109,970	104,611	108,312	118,328	124,973	128,754	123,917	125,641	135,363	148,682
Public Administration	32,718	31,635	29,834	29,339	31,490	35,458	36,380	36,308	35,032	33,928
TOTAL	201,480	192,816	194,136	204,425	214,611	220,237	211,885	211,050	218,838	231,908

Annual Percentage Distribution

Industry Group	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Agriculture	0.2	0.2	0.1	0.1	0.1	0.1	0.2	0.2	0.1	0.1
Finance	17.5	17.5	17.3	16.7	16.3	15.0	14.3	13.6	12.9	12.5
Insurance	6.4	6.5	6.3	5.9	5.7	5.5	5.1	4.6	4.4	4.1
Real Estate	5.1	5.1	5.2	5.0	5.0	4.9	4.8	4.8	4.6	4.6
Office Services	54.6	54.3	55.8	57.9	58.2	58.5	58.5	59.5	61.9	64.1
Public Administration	16.2	16.4	15.4	14.4	14.7	16.1	17.2	17.2	16.0	14.6
TOTAL	100.0									

Percentage Change

Industry Group	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Agriculture	-4.9	-40.8	5.8	-8.5	13.7	31.7	8.2	-23.8	-32.4
Finance	-4.4	-0.6	2.0	2.1	-5.6	-8.2	-5.2	-1.5	2.6
Insurance	-2.9	-2.8	-1.7	2.4	-2.0	-10.0	-9.3	-0.7	-2.2
Real Estate	-2.6	1.2	2.8	3.8	0.3	-5.5	0.6	-0.8	4.2
Office Services	-4.9	3.5	9.2	5.6	3.0	-3.8	1.4	7.7	9.8
Public Administration	-3.3	-5.7	-1.7	7.3	12.6	2.6	-0.2	-3.5	-3.2
TOTAL	-4.3	0.7	5.3	5.0	2.6	-3.8	-0.4	3.7	6.0

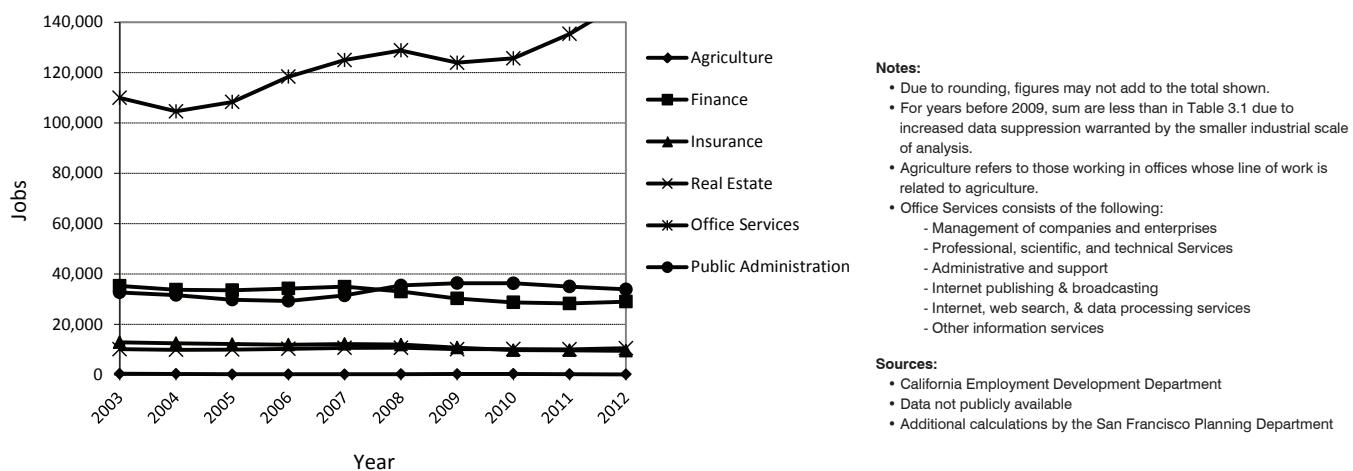


Table & Figure 3.2.2
RETAIL EMPLOYMENT BY INDUSTRY GROUP, 2003-2012

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

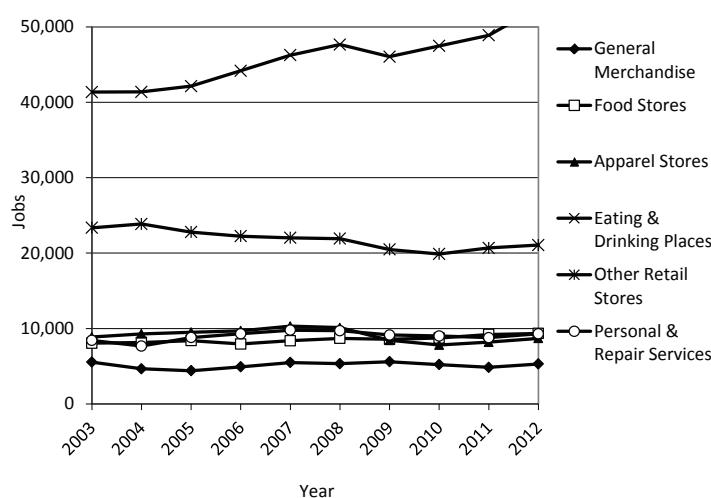
Industry Group	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
General Merchandise	5,543	4,662	4,401	4,921	5,486	5,337	5,598	5,219	4,846	5,302
Food Stores	8,051	8,144	8,394	7,940	8,382	8,694	8,575	8,727	9,213	9,349
Apparel Stores	8,871	9,285	9,509	9,698	10,313	10,117	8,434	7,815	8,184	8,687
Eating & Drinking Places	41,358	41,378	42,139	44,183	46,260	47,662	46,049	47,483	48,893	52,600
Other Retail Stores	23,356	23,859	22,794	22,247	22,033	21,926	20,486	19,886	20,678	21,070
Personal & Repair Services	8,419	7,678	8,795	9,306	9,780	9,707	9,136	9,009	8,784	9,298
TOTAL	95,599	95,006	96,033	98,294	102,253	103,443	98,278	98,139	100,598	106,306

Annual Percentage Distribution

Industry Group	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
General Merchandise	5.8	4.9	4.6	5.0	5.4	5.2	5.7	5.3	4.8	5.0
Food Stores	8.4	8.6	8.7	8.1	8.2	8.4	8.7	8.9	9.2	8.8
Apparel Stores	9.3	9.8	9.9	9.9	10.1	9.8	8.6	8.0	8.1	8.2
Eating & Drinking Places	43.3	43.6	43.9	44.9	45.2	46.1	46.9	48.4	48.6	49.5
Other Retail Stores	24.4	25.1	23.7	22.6	21.5	21.2	20.8	20.3	20.6	19.8
Personal & Repair Services	8.8	8.1	9.2	9.5	9.6	9.4	9.3	9.2	8.7	8.7
TOTAL	100.0									

Percentage Change

Industry Group	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
General Merchandise	-15.9	-5.6	11.8	11.5	-2.7	4.9	-6.8	-7.1	9.4
Food Stores	1.2	3.1	-5.4	5.6	3.7	-1.4	1.8	5.6	1.5
Apparel Stores	4.7	2.4	2.0	6.3	-1.9	-16.6	-7.3	4.7	6.1
Eating & Drinking Places	0.0	1.8	4.9	4.7	3.0	-3.4	3.1	3.0	7.6
Other Retail Stores	2.2	-4.5	-2.4	-1.0	-0.5	-6.6	-2.9	4.0	1.9
Personal & Repair Services	-8.8	14.6	5.8	5.1	-0.7	-5.9	-1.4	-2.5	5.9
TOTAL	-0.6	1.1	2.4	4.0	1.2	-5.0	-0.1	2.5	5.7



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, 2003-2012**

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

Annual Average Number of Jobs

<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Construction	18,085	17,527	16,615	17,397	19,415	19,630	15,813	14,474	13,860	15,011
Transportation	21,653	21,099	20,222	19,204	19,071	17,484	17,044	16,305	16,052	16,135
Utilities	10,311	10,517	10,503	9,541	7,061	7,837	7,936	7,874	8,364	8,479
Information	9,415	8,226	6,930	6,189	8,350	8,359	7,165	6,565	6,531	6,724
Wholesale	12,754	12,306	12,087	11,729	12,274	12,377	10,943	10,499	10,830	12,015
Food Manufacturing	2,607	2,533	2,572	2,052	1,974	2,008	1,920	1,865	1,867	2,063
Apparel Manufacturing	4,779	4,256	3,387	3,172	2,864	2,426	1,847	1,487	1,513	1,536
Printing & Publishing	7,960	7,804	7,494	7,419	7,738	7,379	8,096	7,687	7,114	7,351
Other Manufacturing	6,171	4,747	4,815	4,921	6,050	5,626	5,963	6,211	6,335	6,323
TOTAL	93,735	89,014	84,623	81,625	84,796	83,125	76,727	72,967	72,466	75,637

Annual Percentage Distribution

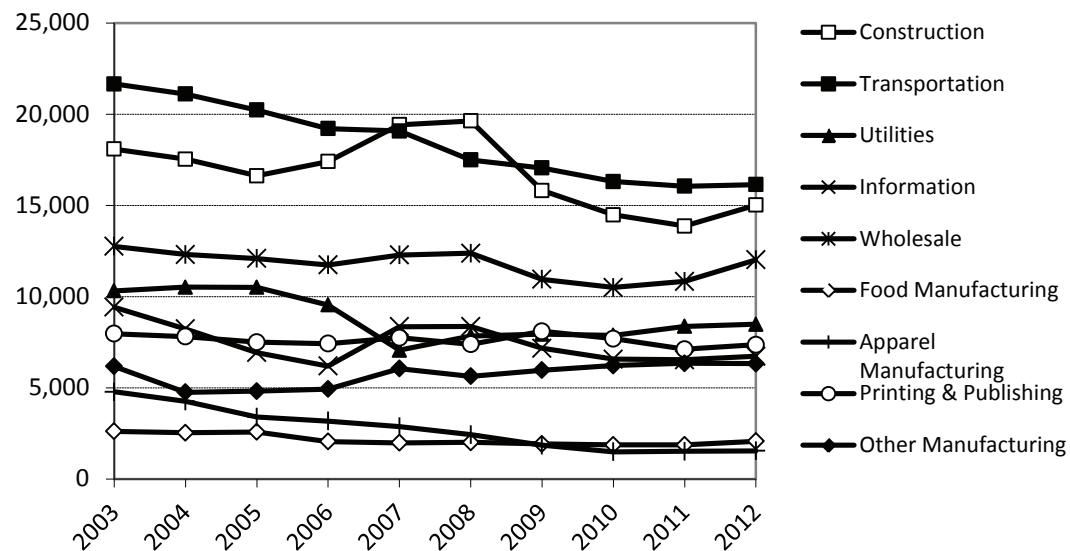
<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Construction	19.3	19.7	19.6	21.3	22.9	23.6	20.6	19.8	19.1	19.8
Transportation	23.1	23.7	23.9	23.5	22.5	21.0	22.2	22.3	22.2	21.3
Utilities	11.0	11.8	12.4	11.7	8.3	9.4	10.3	10.8	11.5	11.2
Information	10.0	9.2	8.2	7.6	9.8	10.1	9.3	9.0	9.0	8.9
Wholesale	13.6	13.8	14.3	14.4	14.5	14.9	14.3	14.4	14.9	15.9
Food Manufacturing	2.8	2.8	3.0	2.5	2.3	2.4	2.5	2.6	2.6	2.7
Apparel Manufacturing	5.1	4.8	4.0	3.9	3.4	2.9	2.4	2.0	2.1	2.0
Printing & Publishing	8.5	8.8	8.9	9.1	9.1	8.9	10.6	10.5	9.8	9.7
Other Manufacturing	6.6	5.3	5.7	6.0	7.1	6.8	7.8	8.5	8.7	8.4
TOTAL	100.0									

Percentage Change

<i>Industry Group</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Construction	-3.1	-5.2	4.7	11.6	1.1	-19.4	-8.5	-4.2	8.3
Transportation	-2.6	-4.2	-5.0	-0.7	-8.3	-2.5	-4.3	-1.6	0.5
Utilities	2.0	-0.1	-9.2	-26.0	11.0	1.3	-0.8	6.2	1.4
Information	-12.6	-15.8	-10.7	34.9	0.1	-14.3	-8.4	-0.5	3.0
Wholesale	-3.5	-1.8	-3.0	4.6	0.8	-11.6	-4.1	3.2	10.9
Food Manufacturing	-2.9	1.6	-20.2	-3.8	1.7	-4.4	-2.9	0.1	10.5
Apparel Manufacturing	-10.9	-20.4	-6.4	-9.7	-15.3	-23.9	-19.5	1.7	1.5
Printing & Publishing	-2.0	-4.0	-1.0	4.3	-4.6	9.7	-5.1	-7.5	3.3
Other Manufacturing	-23.1	1.4	2.2	22.9	-7.0	6.0	4.2	2.0	-0.2
TOTAL	-5.0	-4.9	-3.5	3.9	-2.0	-7.7	-4.9	-0.7	4.4

Figure 3.2.3

PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 2003-2012

**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, 2003-2012**

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

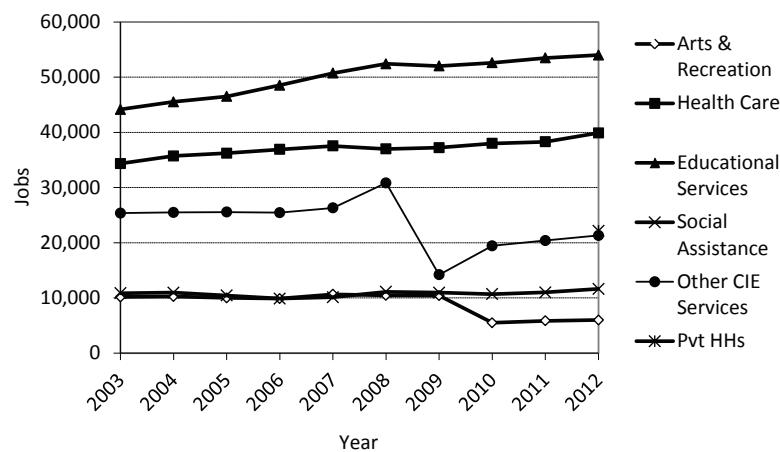
<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Art & Recreation	10,179	10,253	10,006	9,875	10,645	10,477	10,420	5,491	5,863	5,995
Health Care	34,336	35,720	36,222	36,910	37,530	36,995	37,211	37,999	38,279	39,896
Educational Services	44,145	45,529	46,507	48,539	50,732	52,424	52,022	52,595	53,470	53,996
Social Assistance	10,854	10,964	10,439	9,876	10,138	11,117	10,977	10,690	11,000	11,642
Other CIE Services	25,369	25,495	25,553	25,446	26,316	30,835	14,201	19,433	20,403	21,324
Pvt HH	-	-	-	-	-	-	19,443	19,819	20,327	22,156
TOTAL	124,882	127,962	128,726	130,645	135,361	141,848	144,274	146,027	149,342	155,009

Annual Percentage Distribution

<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Art & Recreation	8.2	8.0	7.8	7.6	7.9	7.4	7.2	3.8	3.9	3.9
Health Care	27.5	27.9	28.1	28.3	27.7	26.1	25.8	26.0	25.6	25.7
Educational Services	35.3	35.6	36.1	37.2	37.5	37.0	36.1	36.0	35.8	34.8
Social Assistance	8.7	8.6	8.1	7.6	7.5	7.8	7.6	7.3	7.4	7.5
Other CIE Services	20.3	19.9	19.9	19.5	19.4	21.7	9.8	13.3	13.7	13.8
Pvt HH	-	-	-	-	-	-	13.5	13.6	13.6	14.3
TOTAL	100.0									

Percentage Change

<i>Industry Group</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Art & Recreation	0.7	-2.4	-1.3	7.8	-1.6	-0.5	-47.3	6.8	2.3
Health Care	4.0	1.4	1.9	1.7	-1.4	0.6	2.1	0.7	4.2
Educational Services	3.1	2.1	4.4	4.5	3.3	-0.8	1.1	1.7	1.0
Social Assistance	1.0	-4.8	-5.4	2.6	9.7	-1.3	-2.6	2.9	5.8
Other CIE Services	0.5	0.2	-0.4	3.4	17.2	-53.9	36.8	5.0	4.5
Pvt HH	-	-	-	-	-	-	1.9	2.6	9.0
TOTAL	2.5	0.6	1.5	3.6	4.8	1.7	1.2	2.3	3.8

**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.
- 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, 2012**

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

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	2,242	2,455	11,269	8	1,079	1,061	18,114
Civic Center	14,047	8,503	1,018	4,903	14,120	1,511	44,102
Financial	123,272	18,482	20,772	5,865	13,632	1,638	183,661
Mission	3,180	6,298	2,756	40	4,205	1,256	17,735
North Beach	3,023	7,612	1,646	1,250	2,904	1,415	17,850
North Central	4,781	12,205	1,302	575	42,780	2,445	64,088
Northwest	4,033	5,828	2,598	38	10,756	2,051	25,304
South of Market	56,713	21,571	27,464	3,560	18,917	2,290	130,515
Southwest	7,352	13,912	3,952	84	16,559	5,603	47,462
Van Ness	4,160	6,264	937	866	5,905	1,497	19,629
Treasure Island	76	7	47	0	696	45	871
Unclassified	9,031	3,168	1,874	211	1,300	1,345	16,929
TOTAL	231,910	106,305	75,635	17,400	132,853	22,157	586,260

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	1.0	2.3	14.9	0.0	0.8	4.8	3.1
Civic Center	6.1	8.0	1.3	28.2	10.6	6.8	7.5
Financial	53.2	17.4	27.5	33.7	10.3	7.4	31.3
Mission	1.4	5.9	3.6	0.2	3.2	5.7	3.0
North Beach	1.3	7.2	2.2	7.2	2.2	6.4	3.0
North Central	2.1	11.5	1.7	3.3	32.2	11.0	10.9
Northwest	1.7	5.5	3.4	0.2	8.1	9.3	4.3
South of Market	24.5	20.3	36.3	20.5	14.2	10.3	22.3
Southwest	3.2	13.1	5.2	0.5	12.5	25.3	8.1
Van Ness	1.8	5.9	1.2	5.0	4.4	6.8	3.3
Treasure Island	0.0	0.0	0.1	0.0	0.5	0.2	0.1
Unclassified	3.9	3.0	2.5	1.2	1.0	6.1	2.9
TOTAL	100.0						

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	12.4	13.6	62.2	0.0	6.0	5.9	100.0
Civic Center	31.9	19.3	2.3	11.1	32.0	3.4	100.0
Financial	67.1	10.1	11.3	3.2	7.4	0.9	100.0
Mission	17.9	35.5	15.5	0.2	23.7	7.1	100.0
North Beach	16.9	42.6	9.2	7.0	16.3	7.9	100.0
North Central	7.5	19.0	2.0	0.9	66.8	3.8	100.0
Northwest	15.9	23.0	10.3	0.2	42.5	8.1	100.0
South of Market	43.5	16.5	21.0	2.7	14.5	1.8	100.0
Southwest	15.5	29.3	8.3	0.2	34.9	11.8	100.0
Van Ness	21.2	31.9	4.8	4.4	30.1	7.6	100.0
Treasure Island	8.7	0.8	5.4	0.0	79.9	5.2	100.0
Unclassified	53.3	18.7	11.1	1.2	7.7	7.9	100.0
TOTAL	39.6	18.1	12.9	3.0	22.7	3.8	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



Photo by Beth Jusino

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 2003 to 2012. *Tables 4.2.1* through *4.2.4* show establishment data by Industry Group within each Land Use Category in San Francisco from 2003 to 2012. *Tables 4.3* and *4.4* present San Francisco establishments for 2012 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, 2003-2012**

This table contains the number of establishments in each of the five major non-residential land use categories in San Francisco. Data is presented from 2003-2012. Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 4.1.1 (a snapshot of establishment distribution in 2011) and 4.1.2 (a look at ten year trends).

Number of Establishments

Land Use Category	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Office	11,873	11,314	10,983	10,778	11,280	11,179	11,292	11,419	11,430	11,511
Retail	7,805	7,761	7,651	7,450	7,517	7,395	7,473	7,496	7,541	7,516
PDR	5,341	5,122	4,984	4,826	4,847	4,839	4,812	4,718	4,614	4,483
Hotel	324	339	329	320	311	291	288	292	299	290
CIE	17,649	18,736	19,254	19,481	20,235	20,710	24,888	4,739	4,794	4,844
Pvt HH	-	-	-	-	-	-	-	22,864	24,161	26,607
TOTAL	42,992	43,272	43,201	42,855	44,190	44,414	48,753	51,528	52,839	55,251

Annual Percentage Distribution

Land Use Category	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Office	27.6	26.1	25.4	25.1	25.5	25.2	23.2	22.2	21.6	20.8
Retail	18.2	17.9	17.7	17.4	17.0	16.7	15.3	14.5	14.3	13.6
PDR	12.4	11.8	11.5	11.3	11.0	10.9	9.9	9.2	8.7	8.1
Hotel	0.8	0.8	0.8	0.7	0.7	0.7	0.6	0.6	0.6	0.5
CIE	41.1	43.3	44.6	45.5	45.8	46.6	51.0	9.2	9.1	8.8
Pvt HH	-	-	-	-	-	-	-	44.4	45.7	48.2
TOTAL	100.0									

Percentage Change

Land Use Category	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Office	-4.7	-2.9	-1.9	4.7	-0.9	1.0	1.1	0.1	0.7
Retail	-0.6	-1.4	-2.6	0.9	-1.6	1.1	0.3	0.6	-0.3
PDR	-4.1	-2.7	-3.2	0.4	-0.2	-0.6	-2.0	-2.2	-2.8
Hotel	4.6	-2.9	-2.7	-2.8	-6.4	-1.0	1.4	2.4	-3.0
CIE	6.2	2.8	1.2	3.9	2.3	20.2	-81.0	1.2	1.0
Pvt HH	-	-	-	-	-	-	-	5.7	10.1
TOTAL	0.7	-0.2	-0.8	3.1	0.5	9.8	5.7	2.5	4.6

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Pvt HH = Private Household employment
- *The 81% decline in CIE establishments between 2008-2009 can be attributed to the treatment of Private Households as a separate land use category in 2009.
- Prior to 2009, private households were counted as part of CIE.

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, 2012

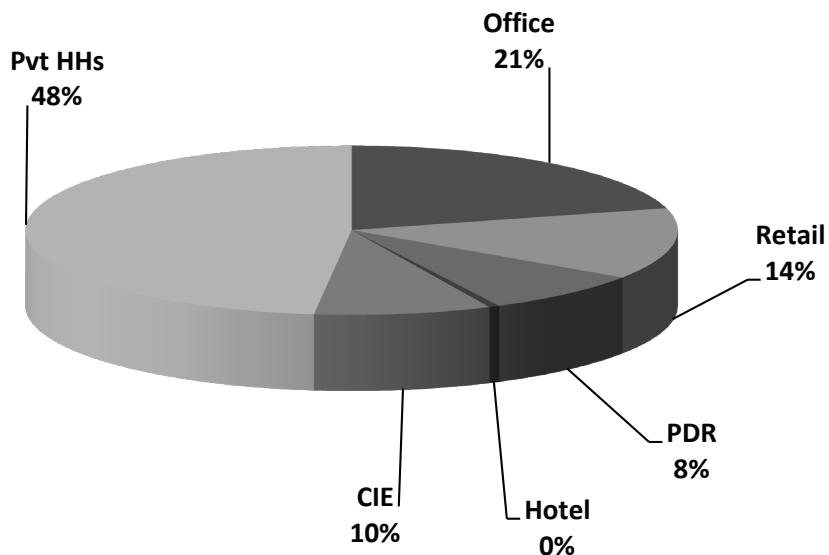


Figure 4.1.1b
SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2003-2012

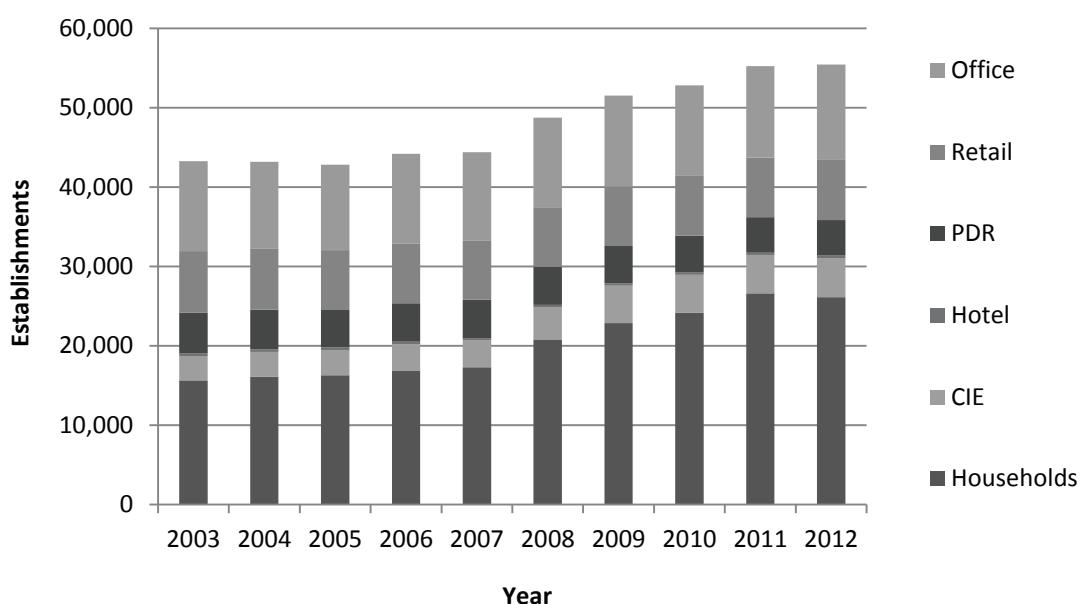


Table & Figure 4.2.1**OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2003-2012**

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

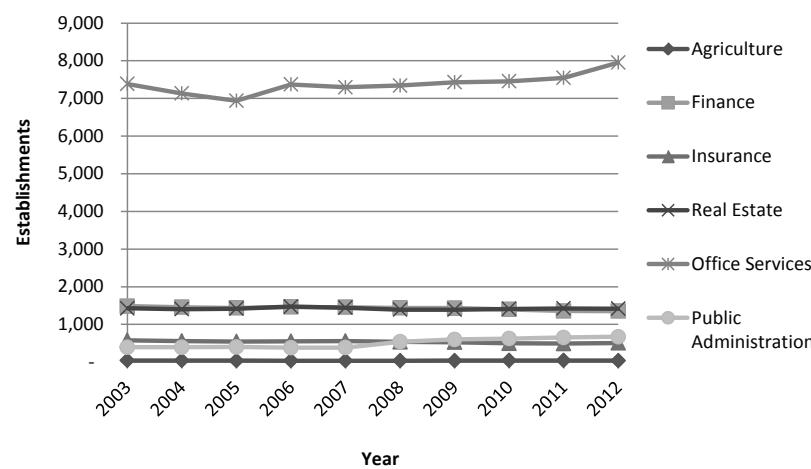
<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Agriculture	42	41	38	37	36	34	39	43	41	38
Finance	1,485	1,455	1,438	1,464	1,455	1,436	1,434	1,399	1,357	1,353
Insurance	579	558	547	552	559	537	525	498	492	508
Real Estate	1,426	1,404	1,418	1,472	1,443	1,393	1,391	1,412	1,424	1,417
Office Services	7,384	7,132	6,937	7,371	7,297	7,343	7,429	7,456	7,544	7,951
Public Administration	393	394	401	380	384	540	601	622	653	671
TOTAL	11,307	10,983	10,778	11,275	11,173	11,283	11,419	11,430	11,511	11,938

Annual Percentage Distribution

<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Agriculture	0.4	0.4	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.3
Finance	13.1	13.2	13.3	13.0	13.0	12.7	12.6	12.2	11.8	11.3
Insurance	5.1	5.1	5.1	4.9	5.0	4.8	4.6	4.4	4.3	4.3
Real Estate	12.6	12.8	13.2	13.1	12.9	12.3	12.2	12.4	12.4	11.9
Office Services	65.3	64.9	64.4	65.4	65.3	65.1	65.1	65.2	65.5	66.6
Public Administration	3.5	3.6	3.7	3.4	3.4	4.8	5.3	5.4	5.7	5.6
TOTAL	100.0									

Percentage Change

<i>Industry Group</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Agriculture	-2.4	-7.9	-2.6	-1.4	7.6	14.7	10.3	-4.7	-7.3
Finance	-2.0	-1.2	1.8	-0.6	-1.5	-0.1	-2.4	-3.0	-0.3
Insurance	-3.6	-1.9	0.9	1.2	-6.0	-2.3	-5.1	-1.2	3.3
Real Estate	-1.5	1.0	3.8	-2.0	-3.6	-0.1	1.5	0.8	-0.5
Office Services	-3.4	-2.7	6.3	-1.0	1.8	1.2	0.4	1.2	5.4
Public Administration	0.3	1.8	-5.2	1.2	56.5	11.4	3.5	5.0	2.8
TOTAL	-2.9	-1.9	4.6	-0.9	2.2	1.2	0.1	0.7	3.7

**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, 2003-2012**

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	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
General Merchandise	55	54	55	69	68	71	72	76	67	62
Food Stores	607	626	629	608	612	594	598	597	597	605
Apparel Stores	680	662	654	661	647	650	630	604	598	605
Eating & Drinking Places	2,900	2,866	2,780	2,858	2,867	2,921	2,972	3,078	3,108	3,189
Other Retail	2,204	2,163	2,097	2,068	1,965	1,995	1,962	1,914	1,900	1,910
Personal & Repair Services	1,256	1,280	1,235	1,255	1,237	1,242	1,262	1,272	1,246	1,296
TOTAL	7,701	7,651	7,450	7,517	7,395	7,473	7,496	7,541	7,516	7,667

Annual Percentage Distribution

Industry Group	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
General Merchandise	0.7	0.7	0.7	0.9	0.9	1.0	1.0	1.0	0.9	0.8
Food Stores	7.9	8.2	8.4	8.1	8.3	7.9	8.0	7.9	7.9	7.9
Apparel Stores	8.8	8.7	8.8	8.8	8.7	8.7	8.4	8.0	8.0	7.9
Eating & Drinking Places	37.7	37.5	37.3	38.0	38.8	39.1	39.6	40.8	41.4	41.6
Other Retail	28.6	28.3	28.2	27.5	26.6	26.7	26.2	25.4	25.3	24.9
Personal & Repair Services	16.3	16.7	16.6	16.7	16.7	16.6	16.8	16.9	16.6	16.9
TOTAL	100.0									

Percentage Change

Industry Group	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
General Merchandise	-1.8	1.9	25.1	-1.1	6.3	1.4	5.6	-11.8	-7.5
Food Stores	3.1	0.6	-3.4	0.6	-2.2	0.8	-0.2	0.0	1.3
Apparel Stores	-2.5	-1.2	1.0	-2.2	-2.6	-3.1	-4.1	-1.0	1.2
Eating & Drinking Places	-1.2	-3.0	2.8	0.3	3.7	1.8	3.6	1.0	2.6
Other Retail	-1.9	-3.0	-1.4	-4.9	-0.2	-1.7	-2.4	-0.7	0.5
Personal & Repair Services	1.9	-3.5	1.6	-1.4	2.0	1.6	0.8	-2.0	4.0
TOTAL	-0.6	-2.6	0.9	-1.6	1.4	0.3	0.6	-0.3	2.0

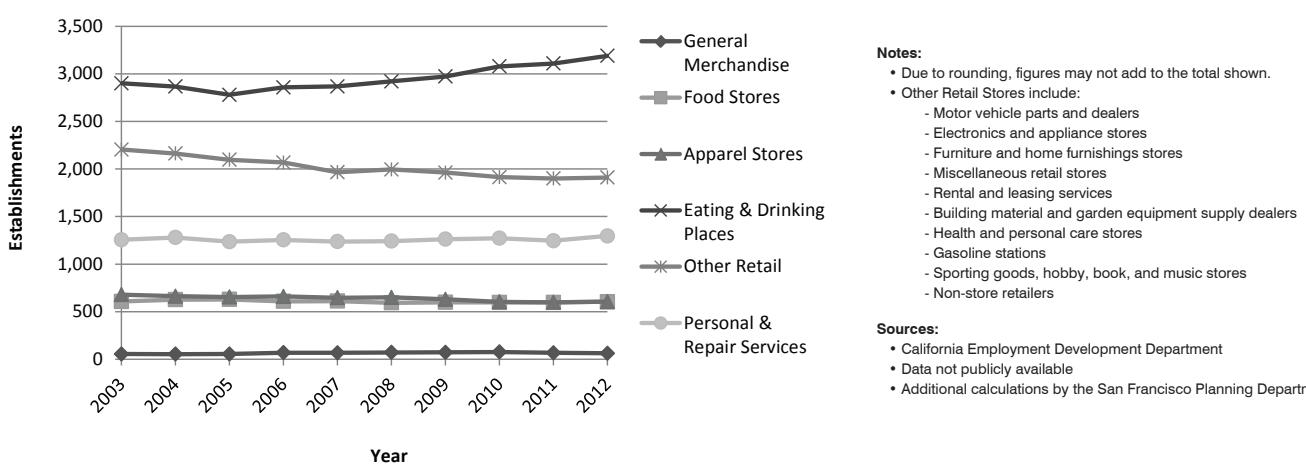


Table 4.2.3
PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2003-2012

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

Number of Establishments

Industry Group	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Construction	1,697	1,678	1,647	1,708	1,687	1,676	1,641	1,598	1,538	1,515
Transportation	544	517	527	502	494	503	418	417	398	400
Utilities	23	26	26	25	26	25	22	25	31	36
Information	213	202	185	187	249	249	247	240	230	229
Wholesale	1,322	1,296	1,255	1,293	1,295	1,302	1,253	1,210	1,178	1,196
Food Manufacturing	168	160	155	152	147	143	140	144	146	157
Apparel Manufacturing	242	226	206	179	168	163	155	146	141	133
Printing & Publishing	424	406	376	358	358	343	342	328	324	338
Other Manufacturing	490	468	450	446	416	410	500	506	499	495
TOTAL	5,122	4,978	4,826	4,849	4,839	4,812	4,718	4,614	4,485	4,499

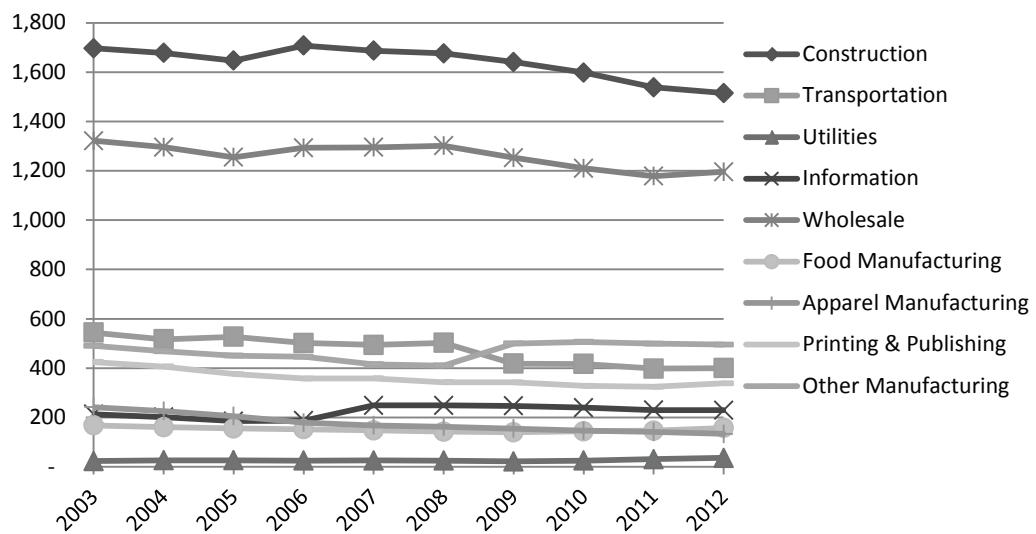
Annual Percentage Distribution

Industry Group	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Construction	33.1	33.7	34.1	35.2	34.9	34.8	34.8	34.6	34.3	33.7
Transportation	10.6	10.4	10.9	10.3	10.2	10.4	8.9	9.0	8.9	8.9
Utilities	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.7	0.8
Information	4.2	4.0	3.8	3.9	5.1	5.2	5.2	5.2	5.1	5.1
Wholesale	25.8	26.0	26.0	26.7	26.8	27.1	26.6	26.2	26.3	26.6
Food Manufacturing	3.3	3.2	3.2	3.1	3.0	3.0	3.0	3.1	3.3	3.5
Apparel Manufacturing	4.7	4.5	4.3	3.7	3.5	3.4	3.3	3.2	3.1	3.0
Printing & Publishing	8.3	8.2	7.8	7.4	7.4	7.1	7.2	7.1	7.2	7.5
Other Manufacturing	9.6	9.4	9.3	9.2	8.6	8.5	10.6	11.0	11.1	11.0
TOTAL	100.0									

Percentage Change

Industry Group	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Construction	-1.1	-1.8	3.7	-1.2	-2.7	-2.1	-2.6	-3.8	-1.5
Transportation	-5.1	2.0	-4.8	-1.5	-15.4	-16.8	-0.2	-4.6	0.5
Utilities	14.3	1.0	-4.8	3.0	-14.6	-12.0	13.6	24.0	16.1
Information	-5.4	-8.2	1.1	33.2	-0.8	-0.6	-2.8	-4.2	-0.4
Wholesale	-1.9	-3.2	3.1	0.2	-3.2	-3.7	-3.4	-2.6	1.5
Food Manufacturing	-4.6	-3.1	-2.1	-3.1	-4.9	-1.8	2.9	1.4	7.5
Apparel Manufacturing	-6.3	-9.2	-12.9	-6.3	-7.6	-4.6	-5.8	-3.4	-5.7
Printing & Publishing	-4.2	-7.5	-4.7	0.1	-4.5	-0.3	-4.1	-1.2	4.3
Other Manufacturing	-4.5	-3.7	-0.9	-6.8	20.3	22.0	1.2	-1.4	-0.8
TOTAL	-2.8	-3.1	0.5	-0.2	-2.5	-1.9	-2.2	-2.8	0.3

Figure 4.2.3
PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2003-2012

**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, 2003-2012**

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

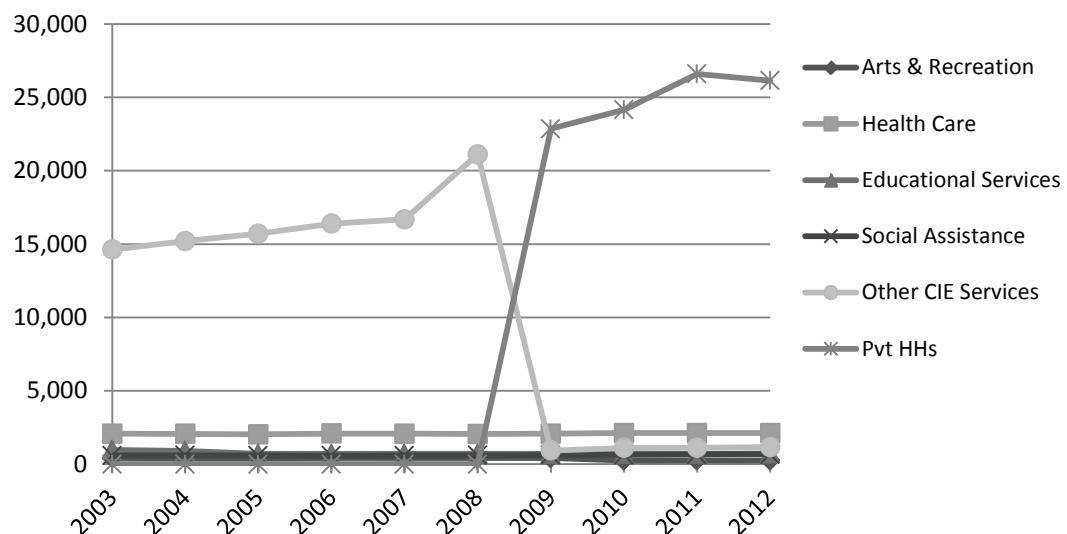
<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Arts & Recreation	412	405	402	424	424	416	416	246	249	253
Health Care	2,070	2,066	2,025	2,086	2,075	2,055	2,071	2,111	2,113	2,120
Educational Services	972	910	699	699	694	697	703	705	714	726
Social Assistance	592	595	586	574	590	600	623	628	655	677
Other CIE Services	14,625	15,209	15,706	16,389	16,684	21,122	926	1,104	1,112	1,154
Pvt HH	-	-	-	-	-	-	22,864	24,161	26,607	26,140
TOTAL	18,671	19,185	19,418	20,172	20,466	24,888	27,603	28,955	31,450	31,070

Annual Percentage Distribution

<i>Industry Group</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Arts & Recreation	2.2	2.1	2.1	2.1	2.1	1.7	1.5	0.8	0.8	0.8
Health Care	11.1	10.8	10.4	10.3	10.1	8.3	7.5	7.3	6.7	6.8
Educational Services	5.2	4.7	3.6	3.5	3.4	2.8	2.5	2.4	2.3	2.3
Social Assistance	3.2	3.1	3.0	2.8	2.9	2.4	2.3	2.2	2.1	2.2
Other CIE Services	78.3	79.3	80.9	81.2	81.5	84.9	3.4	3.8	3.5	3.7
Pvt HH	-	-	-	-	-	-	82.8	83.4	84.6	84.1
TOTAL	100.0									

Percentage Change

<i>Industry Group</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Arts & Recreation	-1.7	-0.7	5.5	-0.1	-1.8	0.0	-40.8	1.2	1.6
Health Care	-0.2	-2.0	3.0	-0.6	-1.0	0.8	1.9	0.1	0.3
Educational Services	-6.4	-23.2	0.0	-0.7	0.4	0.9	0.3	1.3	1.7
Social Assistance	0.4	-1.4	-2.1	2.8	1.6	3.9	0.8	4.3	3.4
Other CIE Services	4.0	3.3	4.4	1.8	26.6	-95.6	19.2	0.7	3.8
Pvt HH	-	-	-	-	-	-	5.7	10.1	-1.8
TOTAL	2.8	1.2	3.9	1.5	21.6	10.9	4.9	8.6	-1.2

Figure 4.2.4**CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2003-2012****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.

Sources:

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

Table 4.3
**ESTABLISHMENTS BY
 COMMERCE & INDUSTRY
 DISTRICT AND LAND USE
 CATEGORY, 2012**

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

Number of Establishments

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	159	230	610	2	83	1,314	2,398
Civic Center	873	461	96	66	319	1,867	3,682
Financial	4,824	1,205	715	46	864	1,666	9,320
Mission	436	560	273	11	296	1,546	3,122
North Beach	370	502	140	22	153	1,655	2,842
North Central	824	938	236	42	684	2,752	5,476
Northwest	531	530	278	6	486	2,272	4,103
South of Market	1,788	1,168	1,060	37	462	2,711	7,226
Southwest	1,268	1,392	838	20	1,172	7,556	12,246
Van Ness	512	522	100	39	324	1,757	3,254
Treasure Island	7	3	5	0	7	56	78
Unclassified	346	155	149	6	80	988	1,724
TOTAL	11,938	7,666	4,500	297	4,930	26,140	55,471

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	1.3	3.0	13.6	0.7	1.7	5.0	4.3
Civic Center	7.3	6.0	2.1	22.2	6.5	7.1	6.6
Financial	40.4	15.7	15.9	15.5	17.5	6.4	16.8
Mission	3.7	7.3	6.1	3.7	6.0	5.9	5.6
North Beach	3.1	6.5	3.1	7.4	3.1	6.3	5.1
North Central	6.9	12.2	5.2	14.1	13.9	10.5	9.9
Northwest	4.4	6.9	6.2	2.0	9.9	8.7	7.4
South of Market	15.0	15.2	23.6	12.5	9.4	10.4	13.0
Southwest	10.6	18.2	18.6	6.7	23.8	28.9	22.1
Van Ness	4.3	6.8	2.2	13.1	6.6	6.7	5.9
Treasure Island	0.1	0.0	0.1	0.0	0.1	0.2	0.1
Unclassified	2.9	2.0	3.3	2.0	1.6	3.8	3.1
TOTAL	100.0						

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Pvt HH	Total
Bayview	6.6	9.6	25.4	0.1	3.5	54.8	100.0
Civic Center	23.7	12.5	2.6	1.8	8.7	50.7	100.0
Financial	51.8	12.9	7.7	0.5	9.3	17.9	100.0
Mission	14.0	17.9	8.7	0.4	9.5	49.5	100.0
North Beach	13.0	17.7	4.9	0.8	5.4	58.2	100.0
North Central	15.0	17.1	4.3	0.8	12.5	50.3	100.0
Northwest	12.9	12.9	6.8	0.1	11.8	55.4	100.0
South of Market	24.7	16.2	14.7	0.5	6.4	37.5	100.0
Southwest	10.4	11.4	6.8	0.2	9.6	61.7	100.0
Van Ness	15.7	16.0	3.1	1.2	10.0	54.0	100.0
Treasure Island	9.0	3.8	6.4	0.0	9.0	71.8	100.0
Unclassified	20.1	9.0	8.6	0.3	4.6	57.3	100.0
TOTAL	21.5	13.8	8.1	0.5	8.9	47.1	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,
 2012**

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

Number of Employees

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	1,767	253	203	109	40	23	2	0	1	2,398
Civic Center	2,681	372	290	218	70	32	11	4	4	3,682
Financial	5,133	1,500	1,096	892	369	224	65	28	13	9,320
Mission	2,393	349	209	118	34	16	2	1	0	3,122
North Beach	2,223	263	179	117	34	21	4	1	0	2,842
North Central	4,258	535	365	214	59	31	3	4	7	5,476
Northwest	3,302	378	254	113	25	18	9	2	2	4,103
South of Market	4,735	873	748	499	186	120	35	15	14	7,225
Southwest	10,241	995	576	311	80	31	8	3	1	12,246
Van Ness	68	2	4	2	0	1	1	0	0	78
Treasure Island	1,443	107	76	59	19	16	2	2	0	1,724
Unclassified	2,602	285	189	118	32	21	5	1	1	3,254
TOTAL	40,846	5,912	4,189	2,770	948	554	147	61	43	55,470

Percentage Distribution by C&I District

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	4.3	4.3	4.8	3.9	4.2	4.2	1.4	0.0	2.3	4.3
Civic Center	6.6	6.3	6.9	7.9	7.4	5.8	7.5	6.6	9.3	6.6
Financial	12.6	25.4	26.2	32.2	38.9	40.4	44.2	45.9	30.2	16.8
Mission	5.9	5.9	5.0	4.3	3.6	2.9	1.4	1.6	0.0	5.6
North Beach	5.4	4.4	4.3	4.2	3.6	3.8	2.7	1.6	0.0	5.1
North Central	10.4	9.0	8.7	7.7	6.2	5.6	2.0	6.6	16.3	9.9
Northwest	8.1	6.4	6.1	4.1	2.6	3.2	6.1	3.3	4.7	7.4
South of Market	11.6	14.8	17.9	18.0	19.6	21.7	23.8	24.6	32.6	13.0
Southwest	25.1	16.8	13.8	11.2	8.4	5.6	5.4	4.9	2.3	22.1
Van Ness	0.2	0.0	0.1	0.1	0.0	0.2	0.7	0.0	0.0	0.1
Treasure Island	3.5	1.8	1.8	2.1	2.0	2.9	1.4	3.3	0.0	3.1
Unclassified	6.4	4.8	4.5	4.3	3.4	3.8	3.4	1.6	2.3	5.9
TOTAL	100.0									

Percentage Distribution by Size Class

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	73.7	10.6	8.5	4.5	1.7	1.0	0.1	0.0	0.0	100.0
Civic Center	72.8	10.1	7.9	5.9	1.9	0.9	0.3	0.1	0.1	100.0
Financial	55.1	16.1	11.8	9.6	4.0	2.4	0.7	0.3	0.1	100.0
Mission	76.6	11.2	6.7	3.8	1.1	0.5	0.1	0.0	0.0	100.0
North Beach	78.2	9.3	6.3	4.1	1.2	0.7	0.1	0.0	0.0	100.0
North Central	77.8	9.8	6.7	3.9	1.1	0.6	0.1	0.1	0.1	100.0
Northwest	80.5	9.2	6.2	2.8	0.6	0.4	0.2	0.0	0.0	100.0
South of Market	65.5	12.1	10.4	6.9	2.6	1.7	0.5	0.2	0.2	100.0
Southwest	83.6	8.1	4.7	2.5	0.7	0.3	0.1	0.0	0.0	100.0
Van Ness	87.2	2.6	5.1	2.6	0.0	1.3	1.3	0.0	0.0	100.0
Treasure Island	83.7	6.2	4.4	3.4	1.1	0.9	0.1	0.1	0.0	100.0
Unclassified	80.0	8.8	5.8	3.6	1.0	0.6	0.2	0.0	0.0	100.0
TOTAL	73.6	10.7	7.6	5.0	1.7	1.0	0.3	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



Photo by Wally Gobelz

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 from 2003 to 2012, 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 2012. Section 5.3 reports city government revenues and expenditures in fiscal year 2012 (July 1, 2011 to June 30, 2012). This data is obtained from the City Controller's office. The tables in each section report each indicator's quantity in specific units and annual percentage distribution.

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

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

5.1 WAGES BY LAND USE CATEGORY

This section describes total annual earnings received by persons for work in San Francisco from 2003 to 2012. 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 2003-2012. 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 fiscal year 2011-2012. The fiscal year ends on June 30th. The data in this subsection is from the Comprehensive Annual Financial Report, prepared by the San Francisco Controller's Office. This data covers the general fund, special revenue funds, and debt service funds. *Table 5.3.1* describes general governmental revenues by source. *Table 5.3.2* describes general governmental expenditures by major function.

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

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

Table 5.3.1 general governmental revenues are presented by major source while *Table 5.3.2* presents them by government function for fiscal year 2011-2012. 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, 2003-2012

This table contains the amount of wages paid to workers in each of the five major non-residential land use categories in San Francisco. Data is presented from 2003-2012, (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 2012) and 5.1.1b (a look at ten-year trends).

Notes:

- Totals from 2003-2012 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>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$17,219,114	\$17,619,077	\$19,229,061	\$22,250,471	\$24,711,750	\$25,544,356	\$23,203,283	\$24,058,220	\$26,738,245	\$28,914,202
Retail	\$2,650,198	\$2,664,799	\$2,841,746	\$2,942,479	\$3,210,333	\$3,233,372	\$3,020,532	\$3,139,383	\$3,333,231	\$3,638,752
PDR	\$5,536,894	\$5,550,080	\$5,553,421	\$6,340,182	\$6,319,130	\$5,897,953	\$5,888,508	\$6,007,279	\$6,852,515	
Hotel	\$538,418	\$584,876	\$613,242	\$671,000	\$704,872	\$764,622	\$695,174	\$691,582	\$736,805	\$740,550
CIE	\$5,403,197	\$5,558,781	\$5,911,782	\$6,817,418	\$7,325,473	\$7,249,460	\$7,541,484	\$7,758,454	\$8,406,144	
Pvt HH	\$0	\$0	\$0	\$0	\$0	\$0	\$375,303	\$314,522	\$288,029	\$293,476
TOTAL	\$31,347,821	\$31,977,613	\$34,149,207	\$37,998,504	\$41,805,696	\$43,316,200	\$40,441,705	\$41,667,560	\$45,112,659	\$48,993,364

Inflation-Adjusted (2012 \$'000s)

<i>Land Use Category</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$21,011,001	\$21,239,496	\$22,734,309	\$25,489,127	\$27,411,367	\$27,480,304	\$24,780,707	\$25,314,935	\$27,450,286	\$28,914,202
Retail	\$3,233,808	\$3,212,370	\$3,359,765	\$3,370,770	\$3,561,043	\$3,478,422	\$3,225,876	\$3,307,497	\$3,422,635	\$3,638,752
PDR	\$6,756,195	\$6,690,527	\$6,562,793	\$6,590,858	\$7,032,810	\$6,798,042	\$6,298,912	\$6,182,768	\$6,168,407	\$6,852,515
Hotel	\$656,985	\$705,058	\$725,029	\$768,667	\$781,876	\$822,571	\$742,434	\$728,617	\$756,568	\$740,550
CIE	\$6,593,055	\$6,701,015	\$6,989,436	\$7,308,714	\$7,562,182	\$7,880,654	\$7,742,299	\$7,945,332	\$8,069,234	\$8,406,144
Pvt HH	-	-	-	-	-	-	\$400,817	\$311,364	\$295,754	\$293,476
TOTAL	\$38,251,045	\$38,548,466	\$40,374,235	\$43,529,357	\$46,372,728	\$46,599,035	\$43,191,045	\$43,898,864	\$46,322,674	\$48,993,364

Annual Percentage Distribution

<i>Land Use Category</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	54.9	55.1	56.3	58.6	59.1	59.0	57.4	57.7	59.3	59.0
Retail	8.5	8.3	8.3	7.7	7.7	7.5	7.5	7.5	7.4	7.4
PDR	17.7	17.4	16.3	15.1	15.2	14.6	14.6	14.1	13.3	14.0
Hotel	1.7	1.8	1.8	1.8	1.7	1.8	1.7	1.7	1.6	1.5
CIE	17.2	17.4	17.3	16.8	16.3	16.9	17.9	18.1	17.4	17.2
Pvt HH	-	-	-	-	-	-	0.9	0.8	0.6	0.6
TOTAL	100.0									

Percentage Change

<i>Land Use Category</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	1.1	7.0	12.1	7.5	0.3	-9.8	2.2	8.4	5.3
Retail	-0.7	4.6	0.3	5.6	-2.3	-7.3	2.5	3.5	6.3
PDR	-1.0	-1.9	0.4	6.7	-3.3	-7.3	-1.8	-0.2	11.1
Hotel	7.3	2.8	6.0	1.7	5.2	-9.7	-1.9	3.8	-2.1
CIE	1.6	4.3	4.6	3.5	4.2	-1.8	2.6	1.6	4.2
Pvt HH	-	-	-	-	-	-	-17.3	-10.7	-0.8
TOTAL	0.8	4.7	7.8	6.5	0.5	-7.3	1.6	5.5	5.8

Figure 5.1.1a
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2012

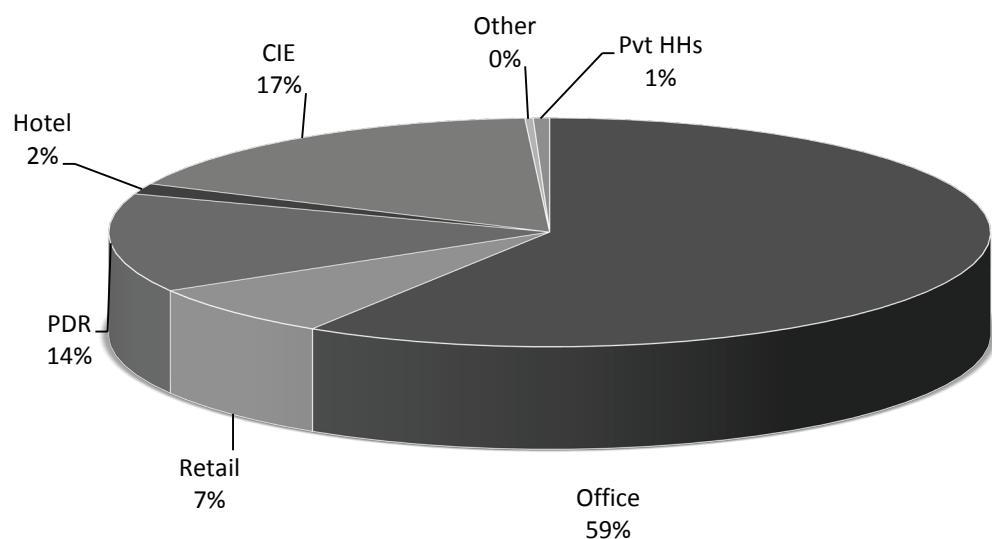


Figure 5.1.1b
TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2003-2012

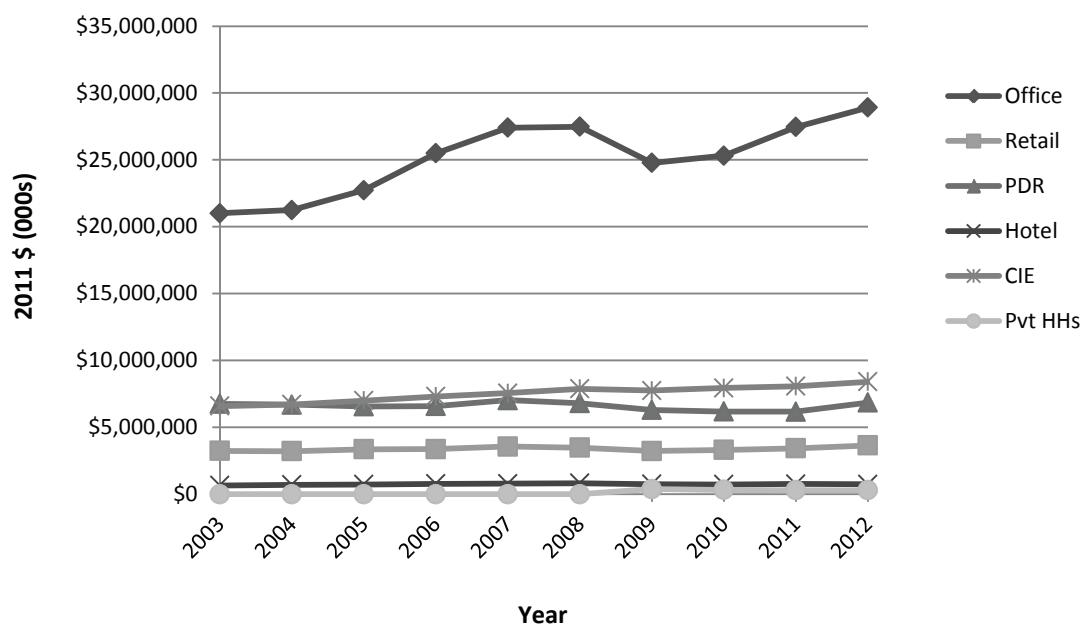


Table & Figure 5.1.2**ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 2003-2012**

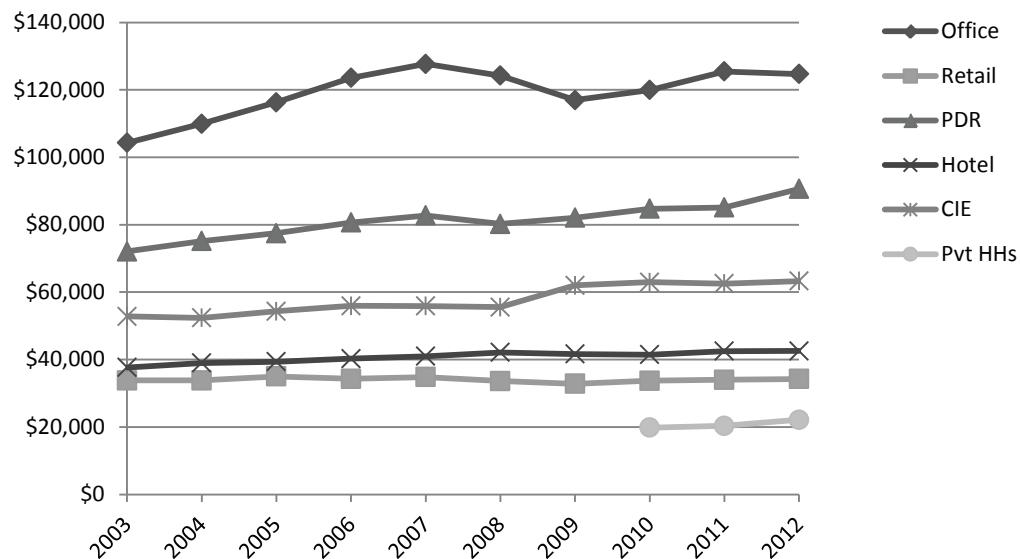
This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.2.

Wages per Worker (2012 \$)

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$104,277	\$109,947	\$116,276	\$123,571	\$127,696	\$124,205	\$116,954	\$119,948	\$125,437	\$124,680
Retail	\$33,827	\$33,812	\$34,986	\$34,293	\$34,826	\$33,626	\$32,824	\$33,702	\$34,023	\$34,229
PDR	\$72,085	\$75,143	\$77,489	\$80,672	\$82,753	\$80,251	\$82,095	\$84,734	\$85,121	\$90,597
Hotel	\$37,675	\$38,975	\$39,352	\$40,272	\$41,000	\$42,125	\$41,644	\$41,474	\$42,516	\$42,560
CIE	\$52,794	\$52,367	\$54,297	\$55,943	\$55,867	\$55,557	\$62,022	\$62,954	\$62,545	\$63,275
Pvt HH	-	-	-	-	-	-	\$20,615	\$16,720	\$14,550	\$13,246
Average	\$71,747	\$73,668	\$77,139	\$81,212	\$83,355	\$81,641	\$81,562	\$83,469	\$82,861	\$83,570

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	5.4	5.8	6.3	3.3	-2.7	-5.8	2.6	4.6	-0.6
Retail	0.0	3.5	-2.0	1.6	-3.4	-2.4	2.7	1.0	0.6
PDR	4.2	3.1	4.1	2.6	-3.0	2.3	3.2	0.5	6.4
Hotel	3.4	1.0	2.3	1.8	2.7	-1.1	-0.4	2.5	0.1
CIE	-0.8	3.7	3.0	-0.1	-0.6	11.6	1.5	-0.7	1.2
Pvt HH	-	-	-	-	-	-	-18.9	-13.0	-9.0
TOTAL	2.7	4.7	5.3	2.6	-2.1	-0.1	2.3	-0.7	0.9



Note: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational; Pvt HH = Private Household employment
Sources: Employees from Table 3.1 of this report; Wages from Table 5.1.1 of this report

Table 5.2.1

This is a table of taxable sales in San Francisco for the last ten years. The first table shows the amount of dollars as recorded each year, and the second shows this amount adjusted to reflect inflation. This information is presented graphically in Figure 5.2.1.

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

<i>Type of Sales</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
All Retail Sales	\$7,766,688	\$8,414,781	\$9,049,788	\$9,588,520	\$10,006,572	\$9,804,636	\$8,511,146	\$8,971,759	\$9,939,895	\$10,878,194
All Outlets	\$11,496,746	\$12,207,507	\$13,025,974	\$13,892,188	\$14,614,736	\$14,837,689	\$12,633,575	\$13,443,121	\$14,890,527	\$16,299,650

Inflation-Adjusted (2012 \$ 000s)

<i>Type of Sales</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
All Retail Sales	\$9,477,020	\$10,143,875	\$10,699,466	\$10,984,172	\$11,099,732	\$10,547,707	\$9,089,758	\$9,452,198	\$10,206,504	\$10,878,194
All Outlets	\$14,028,489	\$14,715,941	\$15,400,467	\$15,914,258	\$16,211,312	\$15,962,203	\$13,492,441	\$14,163,003	\$15,289,922	\$16,299,650

Percentage Change

<i>Type of Sales</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
All Retail Sales	7.0%	5.5%	2.7%	1.1%	-5.0%	-13.8%	4.0%	8.0%	6.6%
All Outlets	4.9%	4.7%	3.3%	1.9%	-1.5%	-15.5%	5.0%	8.0%	6.6%

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, 2003-2012 (2012 \$000s)

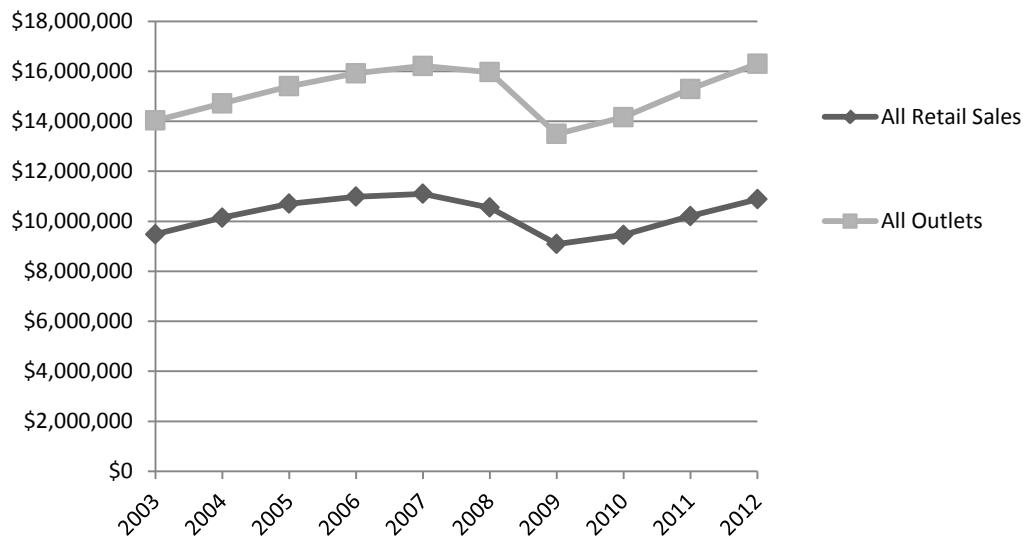


Table 5.2.2
TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2012

This table looks more closely at the type of retail sales that occurred in 2012, 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	2,372	\$1,909,504
General Merchandise	273	\$789,557
Food Stores	1,203	\$706,537
Eating & Drinking	4,402	\$3,484,312
Home Furnishings & Appliances	1,014	\$824,427
Building Materials	316	\$464,756
Service Stations	120	\$654,114
Automotive Dealers and Supplies	225	\$486,789
Other Retail Stores	7,856	\$1,560,776
TOTAL RETAIL STORES	17,782	\$10,878,194
TOTAL OUTLETS	26,907	\$16,299,650

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.

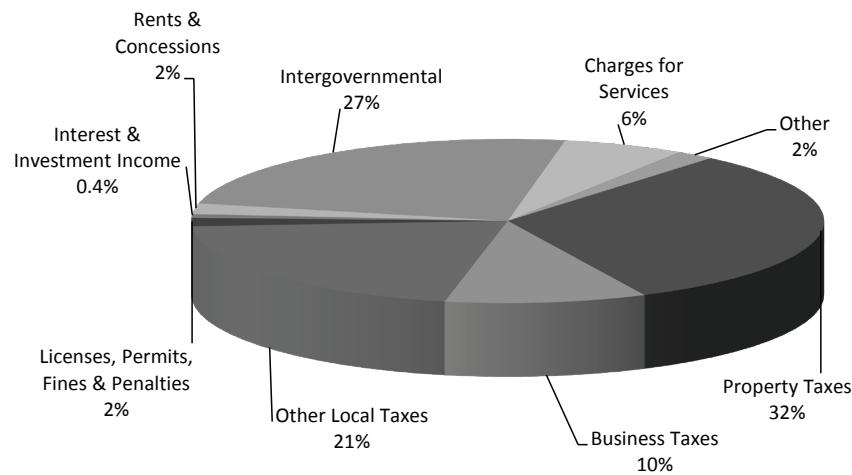
Sources:

- 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 2012**

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2012. This data is shown graphically in Figure 5.3.1.

<i>Revenue Source</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Property Taxes	\$1,352,857	31.8
Business Taxes	\$437,678	10.3
Other Local Taxes	\$883,368	20.8
Licenses, Permits, Fines & Penalties	\$69,860	1.6
Interest & Investment Income	\$31,371	0.7
Rents & Concessions	\$89,183	2.1
Intergovernmental	\$1,042,687	24.5
Federal -	\$420,974	9.9
State -	\$588,532	13.8
Other -	\$33,181	0.8
Charges for Services	\$264,856	6.2
Other	\$83,634	2.0
TOTAL	\$4,255,494	100.0



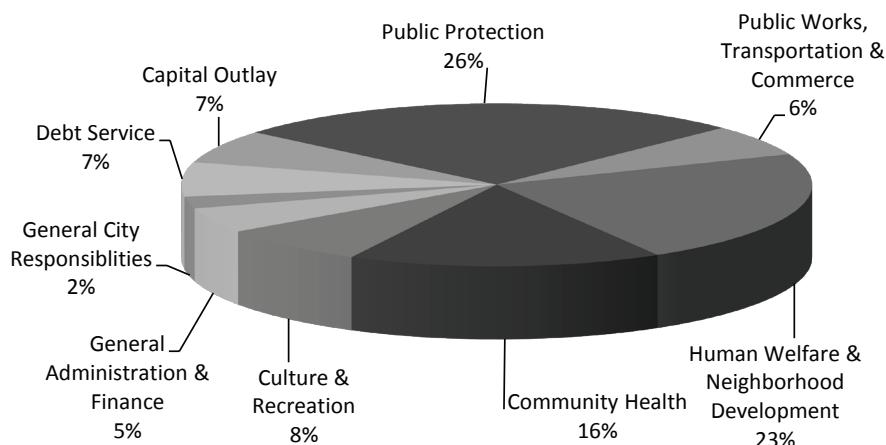
Note: Fiscal Year 2012 runs from July 1, 2011 to June 30, 2012

Source: San Francisco Controller, Comprehensive Annual Financial Report.

Table & Figure 5.3.2**SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2012**

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2012. This data is shown graphically in Figure 5.3.2.

<i>Expenditure Function</i>	<i>Amount (\$ 000s)</i>	<i>% Distribution</i>
Public Protection	\$1,079,203	26.6
Public Works, Transportation & Commerce	\$250,879	6.2
Human Welfare & Neighborhood Development	\$918,414	22.6
Community Health	\$653,263	16.1
Culture & Recreation	\$311,156	7.7
General Administration & Finance	\$203,157	5.0
General City Responsibilities	\$96,150	2.4
Debt Service	\$276,557	6.8
Capital Outlay	\$270,094	6.7
TOTAL	\$4,058,873	100.00



Note: Fiscal Year 2012 runs from July 1, 2011 to June 30, 2012

Source: San Francisco Controller, Comprehensive Annual Financial Report.



Photo by Jeremy Brooks

6.0 Building and Land Use

The tables and graphs in this chapter present information about building permit applications for 2003 through 2012, as well as land use data for 2012. 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 2012 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 2012.

Section 6.4 describes permit applications by application status by Land Use Category and then by C&I District for 2012. 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).

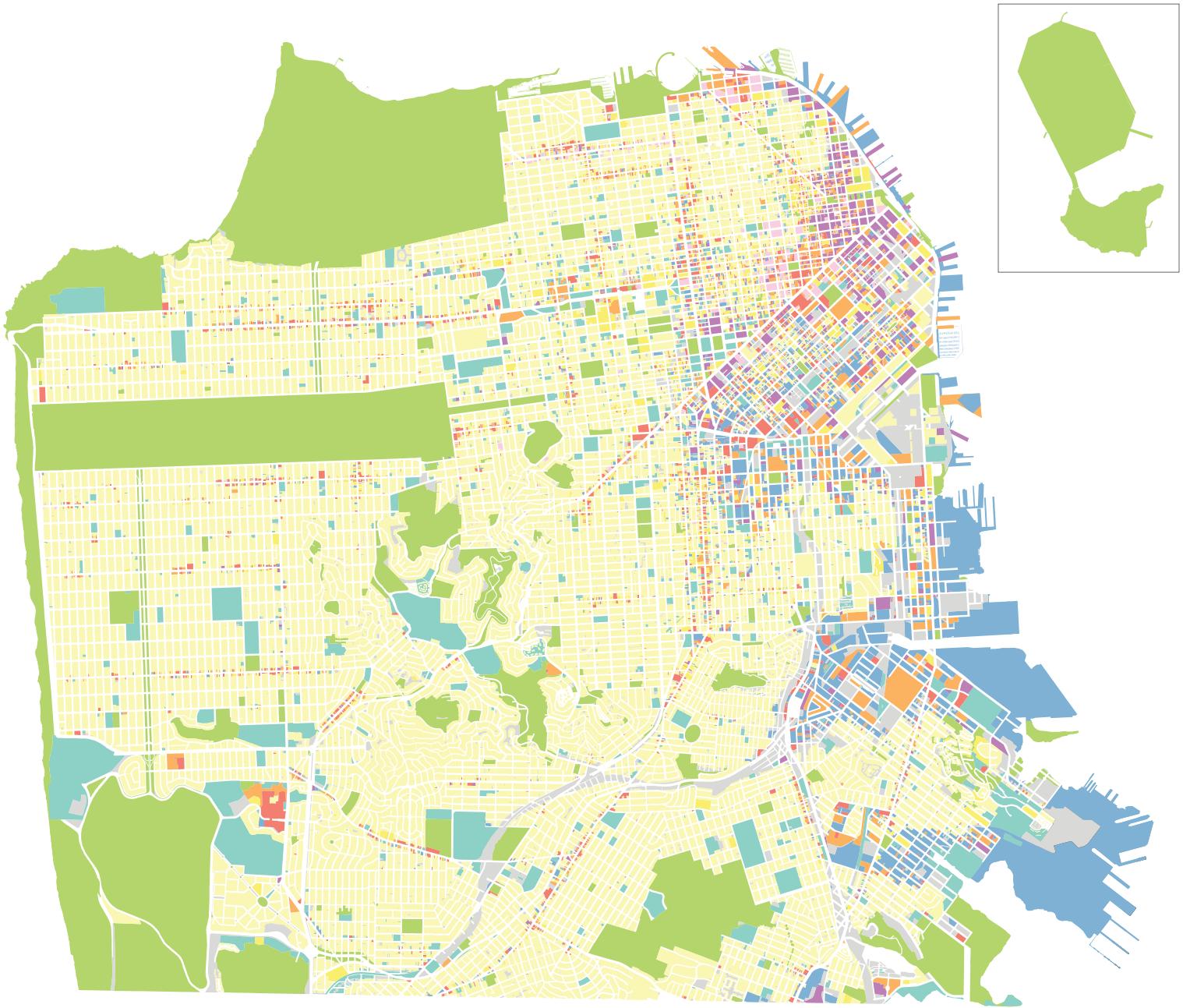
Section 6.5 reports total office space in San Francisco from 2003 to 2012. It includes absolute numbers as well as percentage changes over time. The source of these data is not DBI, but Cushman & Wakefield realtors.

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 2012.



Land Use San Francisco

MAP 6.1

[Color Box]	Cultural, Institutional, Educational	[Color Box]	Residential Mixed Use
[Color Box]	Office	[Color Box]	Residential
[Color Box]	Retail, Entertainment	[Color Box]	Open Space or Public
[Color Box]	Production, Distribution, Repair	[Color Box]	Vacant
[Color Box]	Visitor Services	[Color Box]	Missing or Unclassified
[Color Box]	Mixed Uses		

Table 6.1.1.A
ALL BUILDING PERMITS BY LAND USE CATEGORY, 2003-2012

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

Number of Permits

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	3,581	3,813	4,202	4,133	4,366	3,791	2,907	2,968	3,406	3,712
Retail	1,753	1,887	1,661	2,139	1,852	1,927	2,203	1,967	2,178	2,442
PDR	211	176	185	170	198	235	236	205	248	231
Hotel	196	183	144	193	253	310	260	126	198	224
CIE	432	364	356	429	459	602	547	494	541	618
Residential	19,712	19,930	19,508	19,653	19,939	18,226	15,714	15,533	15,288	15,876
Other	766	724	779	689	931	819	600	631	754	1,193
TOTAL	26,651	27,077	26,835	27,406	27,998	25,910	22,467	21,924	22,613	24,296

Annual Percentage Distribution

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	13.4	14.1	15.7	15.1	15.6	14.6	12.9	13.5	15.1	15.3
Retail	6.6	7.0	6.2	7.8	6.6	7.4	9.8	9.0	9.6	10.1
PDR	0.8	0.6	0.7	0.6	0.7	0.9	1.1	0.9	1.1	1.0
Hotel	0.7	0.7	0.5	0.7	0.9	1.2	1.2	0.6	0.9	0.9
CIE	1.6	1.3	1.3	1.6	1.6	2.3	2.4	2.3	2.4	2.5
Residential	74.0	73.6	72.7	71.7	71.2	70.3	69.9	70.8	67.6	65.3
Other	2.9	2.7	2.9	2.5	3.3	3.2	2.7	2.9	3.3	4.9
TOTAL	100.0									

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	6.5	10.2	-1.6	5.6	-13.2	-23.3	2.1	14.8	9.0
Retail	7.6	-12.0	28.8	-13.4	4.0	14.3	-10.7	10.7	12.1
PDR	-16.6	5.1	-8.1	16.5	18.7	0.4	-13.1	21.0	-6.9
Hotel	-6.6	-21.3	34.0	31.1	22.5	-16.1	-51.5	57.1	13.1
CIE	-15.7	-2.2	20.5	7.0	31.2	-9.1	-9.7	9.5	14.2
Residential	1.1	-2.1	0.7	1.5	-8.6	-13.8	-1.2	-1.6	3.8
Other	-5.5	7.6	-11.6	35.1	-12.0	-26.7	5.2	19.5	58.2
TOTAL	1.6	-0.9	2.1	2.2	-7.5	-13.3	-2.4	3.1	7.4

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, 2003-2012**

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 2012 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 2012 \$ 000s)

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$364,087	\$457,026	\$619,314	\$831,527	\$932,522	\$491,974	\$298,036	\$397,479	\$968,900	\$1,125,567
Retail	\$202,807	\$129,224	\$120,181	\$178,870	\$217,504	\$175,385	\$96,883	\$290,513	\$187,562	\$305,532
PDR	\$23,058	\$30,582	\$18,517	\$23,734	\$50,685	\$28,371	\$24,061	\$12,916	\$17,211	\$17,636
Hotel	\$10,449	\$6,580	\$38,593	\$78,969	\$76,507	\$41,968	\$27,052	\$20,861	\$55,320	\$31,564
CIE	\$160,679	\$287,139	\$78,362	\$145,280	\$116,715	\$125,381	\$97,494	\$211,829	\$179,333	\$337,407
Residential	\$1,176,252	\$1,690,649	\$2,360,543	\$1,588,715	\$1,206,481	\$839,302	\$699,058	\$1,340,511	\$1,567,750	\$2,140,473
Other	\$8,070	\$19,478	\$10,215	\$46,787	\$31,806	\$12,906	\$9,108	\$11,047	\$477,695 ¹	\$57,205
TOTAL	\$1,945,402	\$2,620,676	\$3,245,725	\$2,893,882	\$2,632,221	\$1,715,288	\$1,251,693	\$2,285,156	\$3,453,771	\$4,015,383

Annual Percentage Distribution

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	18.7	17.4	19.1	28.7	35.4	28.7	23.8	17.4	28.1	28.0
Retail	10.4	4.9	3.7	6.2	8.3	10.2	7.7	12.7	5.4	7.6
PDR	1.2	1.2	0.6	0.8	1.9	1.7	1.9	0.6	0.5	0.4
Hotel	8.3	11.0	2.4	5.0	4.4	7.3	7.8	9.3	5.2	0.8
CIE	0.5	0.3	1.2	2.7	2.9	2.4	2.2	0.9	1.6	8.4
Residential	60.5	64.5	72.7	54.9	45.8	48.9	55.8	58.7	45.4	53.3
Other	0.4	0.7	0.3	1.6	1.2	0.8	0.7	0.5	13.8	1.4
TOTAL	100.0									

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	25.5	35.5	34.3	12.1	-47.2	-39.4	33.4	143.8	16.2
Retail	-36.3	-7.0	48.8	21.6	-19.4	-44.8	199.9	-35.4	62.9
PDR	32.6	-39.5	28.2	113.6	-44.0	-15.2	-46.3	33.2	2.5
Hotel	78.7	-72.7	85.4	-19.7	7.4	-22.2	117.3	-15.3	-42.9
CIE	-37.0	486.5	104.6	-3.1	-45.1	-35.5	-22.9	165.2	88.1
Residential	43.7	39.6	-32.7	-24.1	-30.4	-16.7	91.8	17.0	36.5
Other	141.3	-47.6	358.0	-32.0	-59.4	-29.4	21.3	4224.3	-88.0
TOTAL	34.7	23.9	-10.8	-9.0	-34.8	-27.0	82.6	51.1	16.3

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, 2003-2012**

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 2012 \$ 000s)

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$101.7	\$119.9	\$147.4	\$201.2	\$213.6	\$129.8	\$102.5	\$133.9	\$284.5	\$303.2
Retail	\$115.7	\$68.5	\$72.4	\$83.6	\$117.4	\$91.0	\$44.0	\$147.7	\$86.1	\$125.1
PDR	\$109.3	\$173.8	\$100.1	\$139.6	\$256.0	\$120.7	\$102.0	\$63.0	\$69.4	\$76.3
Hotel	\$53.3	\$36.0	\$268.0	\$409.2	\$302.4	\$135.4	\$104.0	\$165.6	\$279.4	\$140.9
CIE	\$371.9	\$788.8	\$220.1	\$338.6	\$254.3	\$208.3	\$178.2	\$428.8	\$331.5	\$546.0
Residential	\$59.7	\$84.8	\$121.0	\$80.8	\$60.5	\$46.0	\$44.5	\$86.3	\$102.5	\$134.8
Other	\$10.5	\$26.9	\$13.1	\$67.9	\$34.2	\$15.8	\$15.2	\$17.5	\$633.5	\$48.0
Average	\$73.0	\$96.8	\$121.0	\$105.6	\$94.0	\$66.2	\$55.7	\$104.2	\$152.7	\$165.3

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	17.9	23.0	36.5	6.2	-39.2	-21.0	30.6	112.4	6.6
Retail	-40.8	5.7	15.6	40.4	-22.5	-51.7	235.8	-41.7	45.3
PDR	59.0	-42.4	39.5	83.4	-52.8	-15.6	-38.2	10.1	10.0
Hotel	-32.6	645.4	52.7	-26.1	-55.2	-23.1	59.1	68.8	-49.6
CIE	112.1	-72.1	53.8	-24.9	-18.1	-14.4	140.6	-22.7	64.7
Residential	42.2	42.6	-33.2	-25.1	-23.9	-3.4	94.0	18.8	31.5
Other	155.3	-51.3	417.9	-49.7	-53.9	-3.7	15.3	3518.9	-92.4
TOTAL	32.6	25.0	-12.7	-11.0	-29.6	-15.8	87.1	46.5	8.2

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, 2003-2012**

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

Number of Permits

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	4	2	6	5	11	9	0	1	8	9
Retail	16	16	10	10	8	5	6	10	9	10
PDR	5	7	4	13	7	13	4	5	5	5
Hotel	0	0	0	1	0	0	0	0	1	0
CIE	11	9	5	18	11	5	5	8	3	13
Residential	252	189	260	179	150	101	63	92	58	148
Other	0	2	0	4	1	0	3	0	9	15
TOTAL	265	288	225	285	230	133	81	116	93	200

Annual Percentage Distribution

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	1.5	0.7	2.7	1.8	4.8	6.8	0.0	0.9	8.6	4.5
Retail	6.0	5.6	4.4	3.5	3.5	3.8	7.4	8.6	9.7	5.0
PDR	1.9	2.4	1.8	4.6	3.0	9.8	4.9	4.3	5.4	2.5
Hotel	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	1.1	0.0
CIE	4.2	3.1	2.2	6.3	4.8	3.8	6.2	6.9	3.2	6.5
Residential	95.1	65.6	115.6	62.8	65.2	75.9	77.8	79.3	62.4	74.0
Other	0.0	0.7	0.0	1.4	0.4	0.0	3.7	0.0	9.7	7.5
TOTAL	100.0									

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	-50.0	200.0	-16.7	120.0	-18.2	-100.0	--	700.0	0.0
Retail	0.0	-37.5	0.0	-20.0	-37.5	20.0	66.7	-10.0	11.1
PDR	40.0	-42.9	225.0	-46.2	85.7	-69.2	25.0	0.0	0.0
Hotel	--	--	--	-100.0	--	--	--	--	-100.0
CIE	-18.2	-44.4	260.0	-38.9	-54.5	0.0	60.0	-62.5	333.3
Residential	-25.0	37.6	-31.2	-16.2	-32.7	-37.6	46.0	-37.0	155.2
Other	--	-100.0	--	-75.0	-100.0	--	-100.0	--	77.8
TOTAL	8.7	-21.9	26.7	-19.3	-42.2	-39.1	43.2	-19.8	115.1

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

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.1.2.B**Total Construction Costs (Inflation-Adjusted 2012 \$ 000s)**

TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 2003-2012	<i>Land Use Category</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$5,028	\$41,888	\$150,230	\$299,473	\$252,915	\$96,207	\$0	\$3,946	\$401,264	\$464,883	
Retail	\$82,636	\$18,428	\$10,542	\$1,320	\$52,678	\$60,421	\$4,354	\$127,928	\$40,837	\$75,876	
PDR	\$4,002	\$5,937	\$1,093	\$7,393	\$34,603	\$12,833	\$1,975	\$606	\$728	\$600	
Hotel	\$0	\$0	\$0	\$13,602	\$0	\$0	\$0	\$0	\$26,368	\$0	
CIE	\$49,363	\$37,685	\$18,506	\$39,340	\$22,273	\$24,325	\$23,054	\$133,582	\$19,152	\$119,820	
Residential	\$488,243	\$1,081,418	\$1,672,831	\$1,010,105	\$481,112	\$229,803	\$243,043	\$793,376	\$1,148,440	\$1,567,645	
Other	\$0	\$257	\$0	\$0	\$306	\$0	\$20	\$0	\$461,544	\$111,050	
TOTAL	\$629,272	\$1,185,613	\$1,853,202	\$1,371,233	\$843,888	\$423,589	\$272,447	\$1,059,437	\$2,098,334	\$2,339,874	

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 2012 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Annual Percentage Distribution

<i>Land Use Category</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	0.8	3.5	8.1	21.8	30.0	22.7	0.0	0.4	19.1	19.9
Retail	13.1	1.6	0.6	0.1	6.2	14.3	1.6	12.1	1.9	3.2
PDR	0.6	0.5	0.1	0.5	4.1	3.0	0.7	0.1	0.0	0.0
Hotel	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	1.3	0.0
CIE	7.8	3.2	1.0	2.9	2.6	5.7	8.5	12.6	0.9	5.1
Residential	77.6	91.2	90.3	73.7	57.0	54.3	89.2	74.9	54.7	67.0
Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.0	4.7
TOTAL	100.0									

Percentage Change

<i>Land Use Category</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	733.1	258.6	99.3	-15.5	-62.0	-100.0	--	10,069.1	15.9
Retail	-77.7	-42.8	-87.5	3,889.9	14.7	-92.8	2,837.9	-68.1	85.8
PDR	48.4	-81.6	576.5	368.1	-62.9	-84.6	-69.3	20.2	-17.6
Hotel	--	--	--	-100.0	--	--	--	--	-100.0
CIE	-23.7	-50.9	112.6	-43.4	9.2	-5.2	479.4	-85.7	525.6
Residential	121.5	54.7	-39.6	-52.4	-52.2	5.8	226.4	44.8	36.5
Other	--	-100.0	--	--	-100.0	--	-100.0	--	-75.9
TOTAL	88.4	56.3	-26.0	-38.5	-49.8	-35.7	288.9	98.1	11.5

Notes:

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

Sources:
San Francisco Planning Department; Department of Building Inspection

Table 6.1.2.C**Average Construction Costs (Inflation-Adjusted 2012 \$ 000s)**

AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 2003-2012	Average Construction Costs (Inflation-Adjusted 2012 \$ 000s)										
	<i>Land Use Category</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$1,257	\$20,944	\$25,038	\$59,895	\$22,992	\$10,690	--	\$3,946	\$50,158	\$51,654	
Retail	\$5,165	\$1,152	\$1,054	\$132	\$6,585	\$12,084	\$726	\$12,793	\$4,537	\$7,588	
PDR	\$800	\$848	\$273	\$569	\$4,943	\$987	\$494	\$121	\$146	\$120	
Hotel	--	--	--	\$13,602	--	--	--	--	\$26,368	--	
CIE	\$4,488	\$4,187	\$3,701	\$2,186	\$2,025	\$4,865	\$4,611	\$16,698	\$6,384	\$9,217	
Residential	\$1,937	\$5,722	\$6,434	\$5,643	\$3,207	\$2,275	\$3,858	\$8,624	\$19,801	\$10,592	
Other	--	\$128	--	\$0	\$306	--	\$7	--	\$51,283	\$7,403	
TOTAL	\$2,375	\$4,117	\$8,236	\$4,811	\$3,669	\$3,185	\$3,364	\$9,133	\$22,563	\$11,699	

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).

Percentage Change

	<i>Land Use Category</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	1,566.2	19.5	139.2	-61.6	-53.5	--	--	--	1,171.1	3.0
Retail	-77.7	-8.5	-87.5	4,887.3	83.5	-94.0	1,662.7	-64.5	67.2	
PDR	6.0	-67.8	108.2	769.2	-80.0	-50.0	-75.5	20.2	-17.6	
Hotel	--	--	--	--	--	--	--	--	--	
CIE	-6.7	-11.6	-40.9	-7.4	140.3	-5.2	262.1	-61.8	44.4	
Residential	195.3	12.4	-12.3	-43.2	-29.1	69.6	123.5	129.6	-46.5	
Other	--	--	--	--	--	--	--	--	-85.6	
TOTAL	73.4	100.1	-41.6	-23.7	-13.2	5.6	171.5	147.0	-48.1	

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, 2003-2012**

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>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	3,577	3,811	4,196	4,128	4,355	3,782	2,907	2,967	3,398	3,704
Retail	1,737	1,871	1,651	2,129	1,844	1,922	2,197	1,955	2,168	2,432
PDR	206	169	181	157	191	222	232	200	243	226
Hotel	196	183	144	192	253	310	260	126	197	224
CIE	421	355	351	411	448	597	542	486	538	606
Residential	19,460	19,741	19,249	19,474	19,789	18,125	15,651	15,441	15,230	15,728
Other	267	273	379	264	335	270	218	212	271	328
TOTAL	25,864	26,403	26,151	26,755	27,215	25,228	22,007	21,387	22,045	23,248

Annual Percentage Distribution

<i>Land Use Category</i>	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	13.8	14.4	16.0	15.4	16.0	15.0	13.2	13.9	15.4	15.9
Retail	6.7	7.1	6.3	8.0	6.8	7.6	10.0	9.1	9.8	10.5
PDR	0.8	0.6	0.7	0.6	0.7	0.9	1.1	0.9	1.1	1.0
Hotel	0.8	0.7	0.6	0.7	0.9	1.2	1.2	0.6	0.9	1.0
CIE	1.6	1.3	1.3	1.5	1.6	2.4	2.5	2.3	2.4	2.6
Residential	75.2	74.8	73.6	72.8	72.7	71.8	71.1	72.2	69.1	67.7
Other	1.0	1.0	1.4	1.0	1.2	1.1	1.0	1.0	1.2	1.4
TOTAL	100.0									

Percentage Change

<i>Land Use Category</i>	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	6.5	10.1	-1.6	5.5	-13.2	-23.1	2.1	14.5	9.0
Retail	7.7	-11.8	29.0	-13.4	4.2	14.3	-11.0	10.9	12.2
PDR	-18.0	7.1	-13.3	21.7	16.2	4.5	-13.8	21.5	-7.0
Hotel	-6.6	-21.3	33.3	31.8	22.5	-16.1	-51.5	56.3	13.7
CIE	-15.7	-1.1	17.1	9.0	33.3	-9.2	-10.3	10.7	12.6
Residential	1.4	-2.5	1.2	1.6	-8.4	-13.6	-1.3	-1.4	3.3
Other	2.2	38.8	-30.3	26.9	-19.4	-19.3	-2.8	27.8	21.0
TOTAL	2.1	-1.0	2.3	1.7	-7.3	-12.8	-2.8	3.1	5.5

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, 2003-2012**

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 2012 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 2012 \$ 000s)

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$359,059	\$415,137	\$469,084	\$532,054	\$679,607	\$395,767	\$298,036	\$393,533	\$567,636	\$660,684
Retail	\$120,170	\$110,796	\$109,639	\$177,550	\$164,826	\$114,964	\$92,529	\$162,582	\$146,724	\$229,656
PDR	\$19,056	\$24,645	\$17,424	\$16,341	\$16,082	\$15,538	\$22,086	\$12,310	\$16,482	\$17,036
Hotel	\$10,449	\$6,580	\$38,593	\$65,367	\$76,507	\$41,968	\$27,052	\$20,861	\$28,952	\$31,564
CIE	\$111,316	\$249,453	\$59,856	\$105,939	\$94,442	\$101,056	\$74,439	\$78,247	\$160,181	\$217,587
Residential	\$688,009	\$609,230	\$687,712	\$578,610	\$725,368	\$609,499	\$456,015	\$547,135	\$419,310	\$572,828
Other	\$1,850	\$1,252	\$3,285	\$9,128	\$7,926	\$6,497	\$4,895	\$5,462	\$10,512	\$129,742
TOTAL	\$1,309,909	\$1,417,093	\$1,385,593	\$1,484,989	\$1,764,758	\$1,285,289	\$975,052	\$1,220,130	\$1,349,797	\$1,859,097

Annual Percentage Distribution

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	27.4	29.3	33.9	35.8	38.5	30.8	30.6	32.3	42.1	35.5
Retail	9.2	7.8	7.9	12.0	9.3	8.9	9.5	13.3	10.9	12.4
PDR	1.5	1.7	1.3	1.1	0.9	1.2	2.3	1.0	1.2	0.9
Hotel	0.8	0.5	2.8	4.4	4.3	3.3	2.8	1.7	2.1	1.7
CIE	8.5	17.6	4.3	7.1	5.4	7.9	7.6	6.4	11.9	11.7
Residential	52.5	43.0	49.6	39.0	41.1	47.4	46.8	44.8	31.1	30.8
Other	0.1	0.1	0.2	0.6	0.4	0.5	0.5	0.4	0.8	7.0
TOTAL	100.0									

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	15.6	13.0	13.4	27.7	-41.8	-24.7	32.0	44.2	16.4
Retail	-7.8	-1.0	61.9	-7.2	-30.3	-19.5	75.7	-9.8	56.5
PDR	29.3	-29.3	-6.2	-1.6	-3.4	42.1	-44.3	33.9	3.4
Hotel	-37.0	486.5	69.4	17.0	-45.1	-35.5	-22.9	38.8	9.0
CIE	124.1	-76.0	77.0	-10.9	7.0	-26.3	5.1	104.7	35.8
Residential	-11.5	12.9	-15.9	25.4	-16.0	-25.2	20.0	-23.4	36.6
Other	-32.3	162.4	177.9	-13.2	-18.0	-24.7	11.6	92.5	1134.2
TOTAL	8.2	-2.2	7.2	18.8	-27.2	-24.1	25.1	10.6	37.7

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, 2003-2012**

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 2012 \$ 000s)

Land Use Category	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Office	\$100.4	\$108.9	\$111.8	\$128.9	\$156.1	\$104.6	\$102.5	\$132.6	\$167.1	\$178.4
Retail	\$69.2	\$59.2	\$66.4	\$83.4	\$89.4	\$59.8	\$42.1	\$83.2	\$67.7	\$94.4
PDR	\$92.5	\$145.8	\$96.3	\$104.1	\$84.2	\$70.0	\$95.2	\$61.6	\$67.8	\$75.4
Hotel	\$53.3	\$36.0	\$268.0	\$340.5	\$302.4	\$135.4	\$104.0	\$165.6	\$147.0	\$140.9
CIE	\$264.4	\$702.7	\$170.5	\$257.8	\$210.8	\$169.3	\$137.3	\$161.0	\$297.7	\$359.1
Residential	\$35.4	\$30.9	\$35.7	\$29.7	\$36.7	\$33.6	\$29.1	\$35.4	\$27.5	\$36.4
Other	\$6.9	\$4.6	\$8.7	\$34.6	\$23.7	\$24.1	\$22.5	\$25.8	\$38.8	\$395.6
TOTAL	\$50.6	\$53.7	\$53.0	\$55.5	\$64.8	\$50.9	\$44.3	\$57.1	\$61.2	\$80.0

Percentage Change

Land Use Category	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Office	8.5	2.6	15.3	21.1	-32.9	-2.0	29.4	25.9	6.8
Retail	-14.4	12.1	25.6	7.2	-33.1	-29.6	97.5	-18.6	39.5
PDR	57.6	-34.0	8.1	-19.1	-16.9	36.0	-35.3	10.2	11.1
Hotel	-32.6	645.4	27.0	-11.2	-55.2	-23.1	59.1	-11.2	-4.1
CIE	165.8	-75.7	51.2	-18.2	-19.7	-18.9	17.2	84.9	20.6
Residential	-12.7	15.8	-16.8	23.4	-8.3	-13.4	21.6	-22.3	32.3
Other	-33.8	89.0	298.9	-31.6	1.7	-6.7	14.7	50.6	919.7
TOTAL	6.0	-1.3	4.8	16.8	-21.4	-13.0	28.8	7.3	30.6

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, 2003-2012

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

Number of Permits

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	765	647	716	696	714	633	554	572	599	663
Civic Center	850	851	800	767	1,012	899	751	710	781	793
Financial	2,964	3,359	3,707	3,486	3,733	3,370	2,688	2,600	2,994	3,443
Mission	2,134	2,047	2,012	2,068	1,999	1,972	1,781	1,894	1,821	1,880
North Beach	819	799	860	840	801	832	713	649	730	709
North Central	3,778	3,578	3,612	3,853	4,054	3,506	3,202	2,981	2,916	3,221
Northwest	2,461	2,579	2,471	2,482	2,417	2,478	1,897	1,904	1,936	1,953
South of Market	2,039	2,043	2,127	2,527	2,269	2,263	2,072	1,969	2,131	2,481
Southwest	9,547	9,894	9,372	9,428	9,347	8,656	7,582	7,550	7,368	7,656
Van Ness	1,145	1,130	1,050	1,171	1,502	1,186	987	1,064	1,108	1,254
Unclassified	145	149	129	87	139	91	232	185	221	243
TOTAL	26,647	27,076	26,856	27,405	27,987	25,886	22,459	22,078	22,605	24,296

Annual Percentage Distribution

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	2.9	2.4	2.7	2.5	2.6	2.4	2.5	2.6	2.6	2.7
Civic Center	3.2	3.1	3.0	2.8	3.6	3.5	3.3	3.2	3.5	3.3
Financial	11.1	12.4	13.8	12.7	13.3	13.0	12.0	11.8	13.2	14.2
Mission	8.0	7.6	7.5	7.5	7.1	7.6	7.9	8.6	8.1	7.7
North Beach	3.1	3.0	3.2	3.1	2.9	3.2	3.2	2.9	3.2	2.9
North Central	14.2	13.2	13.4	14.1	14.5	13.5	14.3	13.5	12.9	13.3
Northwest	9.2	9.5	9.2	9.1	8.6	9.6	8.4	8.6	8.6	8.0
South of Market	7.7	7.5	7.9	9.2	8.1	8.7	9.2	8.9	9.4	10.2
Southwest	35.8	36.5	34.9	34.4	33.4	33.4	33.8	34.2	32.6	31.5
Van Ness	4.3	4.2	3.9	4.3	5.4	4.6	4.4	4.8	4.9	5.2
Unclassified	0.5	0.6	0.5	0.3	0.5	0.4	1.0	0.8	1.0	1.0
TOTAL	100.0									

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	-15.4	10.7	-2.8	2.6	-11.3	-12.5	3.2	4.7	10.7
Civic Center	0.1	-6.0	-4.1	31.9	-11.2	-16.5	-5.5	10.0	1.5
Financial	13.3	10.4	-6.0	7.1	-9.7	-20.2	-3.3	15.2	15.0
Mission	-4.1	-1.7	2.8	-3.3	-1.4	-9.7	6.3	-3.9	3.2
North Beach	-2.4	7.6	-2.3	-4.6	3.9	-14.3	-9.0	12.5	-2.9
North Central	-5.3	1.0	6.7	5.2	-13.5	-8.7	-6.9	-2.2	10.5
Northwest	4.8	-4.2	0.4	-2.6	2.5	-23.4	0.4	1.7	0.9
South of Market	0.2	4.1	18.8	-10.2	-0.3	-8.4	-5.0	8.2	16.4
Southwest	3.6	-5.3	0.6	-0.9	-7.4	-12.4	-0.4	-2.4	3.9
Van Ness	-1.3	-7.1	11.5	28.3	-21.0	-16.8	7.8	4.1	13.2
Unclassified	2.8	-13.4	-32.6	59.8	-34.5	154.9	-20.3	19.5	10.0
TOTAL	1.6	-0.8	2.0	2.1	-7.5	-13.2	-1.7	2.4	7.5

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, 2003-2012**

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 2012 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 2012 \$ 000s)

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	\$57,849	\$63,658	\$368,222	\$82,044	\$143,010	\$22,999	\$139,785	\$43,541	\$33,561	\$70,213
Civic Center	\$121,713	\$106,658	\$88,588	\$171,446	\$112,927	\$85,416	\$57,325	\$151,890	\$83,947	\$424,309
Financial	\$450,464	\$964,185	\$955,346	\$695,625	\$555,205	\$456,403	\$260,430	\$522,731	\$886,411	\$1,067,115
Mission	\$117,474	\$95,328	\$124,832	\$93,737	\$118,534	\$56,457	\$50,672	\$67,592	\$71,384	\$66,563
North Beach	\$55,782	\$58,748	\$41,852	\$52,610	\$36,139	\$62,507	\$37,750	\$33,155	\$39,147	\$28,290
North Central	\$192,321	\$181,220	\$159,354	\$475,039	\$247,118	\$211,853	\$108,691	\$153,408	\$128,132	\$322,699
Northwest	\$92,450	\$102,140	\$105,253	\$106,733	\$156,794	\$101,752	\$58,630	\$72,369	\$62,696	\$81,863
South of Market	\$324,862	\$419,697	\$872,972	\$694,729	\$735,658	\$354,620	\$199,274	\$427,437	\$1,028,915	\$961,299
Southwest	\$403,542	\$506,808	\$389,376	\$327,220	\$333,974	\$296,181	\$278,738	\$278,803	\$215,435	\$288,311
Van Ness	\$87,490	\$96,415	\$111,617	\$123,775	\$187,099	\$63,471	\$49,715	\$46,768	\$193,780	\$129,782
Unclassified	\$41,455	\$25,820	\$28,313	\$70,924	\$5,763	\$3,629	\$10,682	\$487,461 ¹	\$710,362	\$574,939
TOTAL	\$1,945,402	\$2,620,677	\$3,245,725	\$2,893,882	\$2,632,221	\$1,715,288	\$1,251,692	\$2,285,155	\$3,453,770	\$4,015,383

Annual Percentage Distribution

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	3.0	2.4	11.3	2.8	5.4	1.3	11.2	1.9	1.0	1.7
Civic Center	6.3	4.1	2.7	5.9	4.3	5.0	4.6	6.6	2.4	10.6
Financial	23.2	36.8	29.4	24.0	21.1	26.6	20.8	22.9	25.7	26.6
Mission	6.0	3.6	3.8	3.2	4.5	3.3	4.0	3.0	2.1	1.7
North Beach	2.9	2.2	1.3	1.8	1.4	3.6	3.0	1.5	1.1	0.7
North Central	9.9	6.9	4.9	16.4	9.4	12.4	8.7	6.7	3.7	8.0
Northwest	4.8	3.9	3.2	3.7	6.0	5.9	4.7	3.2	1.8	2.0
South of Market	16.7	16.0	26.9	24.0	27.9	20.7	15.9	18.7	29.8	23.9
Southwest	20.7	19.3	12.0	11.3	12.7	17.3	22.3	12.2	6.2	7.2
Van Ness	4.5	3.7	3.4	4.3	7.1	3.7	4.0	2.0	5.6	3.2
Unclassified	2.1	1.0	0.9	2.5	0.2	0.2	0.9	21.3	20.6	14.3
TOTAL	100.0									

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	10.0	478.4	-77.7	74.3	-83.9	507.8	-68.9	-22.9	109.2
Civic Center	-12.4	-16.9	93.5	-34.1	-24.4	-32.9	165.0	-44.7	405.4
Financial	114.0	-0.9	-27.2	-20.2	-17.8	-42.9	100.7	69.6	20.4
Mission	-18.9	30.9	-24.9	26.5	-52.4	-10.2	33.4	5.6	-6.8
North Beach	5.3	-28.8	25.7	-31.3	73.0	-39.6	-12.2	18.1	-27.7
North Central	-5.8	-12.1	198.1	-48.0	-14.3	-48.7	41.1	-16.5	151.8
Northwest	10.5	3.0	1.4	46.9	-35.1	-42.4	23.4	-13.4	30.6
South of Market	29.2	108.0	-20.4	5.9	-51.8	-43.8	114.5	140.7	-6.6
Southwest	25.6	-23.2	-16.0	2.1	-11.3	-5.9	0.0	-22.7	33.8
Van Ness	10.2	15.8	10.9	51.2	-66.1	-21.7	-5.9	314.3	-33.0
Unclassified	-37.7	9.7	150.5	-91.9	-37.0	194.4	4,463.4	45.7	-19.1
TOTAL	34.7	23.9	-10.8	-9.0	-34.8	-27.0	82.6	51.1	16.3

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, 2003-2012**

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 2012 \$ 000s)

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	\$75.6	\$98.4	\$514.3	\$117.9	\$200.3	\$36.3	\$252.3	\$76.1	\$56.0	\$105.9
Civic Center	\$143.2	\$125.3	\$110.7	\$223.5	\$111.6	\$95.0	\$76.3	\$213.9	\$107.5	\$535.1
Financial	\$152.0	\$287.0	\$257.7	\$199.5	\$148.7	\$135.4	\$96.9	\$201.1	\$296.1	\$309.9
Mission	\$55.0	\$46.6	\$62.0	\$45.3	\$59.3	\$28.6	\$28.5	\$35.7	\$39.2	\$35.4
North Beach	\$68.1	\$73.5	\$48.7	\$62.6	\$45.1	\$75.1	\$52.9	\$51.1	\$53.6	\$39.9
North Central	\$50.9	\$50.6	\$44.1	\$123.3	\$61.0	\$60.4	\$33.9	\$51.5	\$43.9	\$100.2
Northwest	\$37.6	\$39.6	\$42.6	\$43.0	\$64.9	\$41.1	\$30.9	\$38.0	\$32.4	\$41.9
South of Market	\$159.3	\$205.4	\$410.4	\$274.9	\$324.2	\$156.7	\$96.2	\$217.1	\$482.8	\$387.5
Southwest	\$42.3	\$51.2	\$41.5	\$34.7	\$35.7	\$34.2	\$36.8	\$36.9	\$29.2	\$37.7
Van Ness	\$76.4	\$85.3	\$106.3	\$105.7	\$124.6	\$53.5	\$50.4	\$44.0	\$174.9	\$103.5
Unclassified	\$285.9	\$173.3	\$219.5	\$815.2	\$41.5	\$39.9	\$46.0	\$2,634.9	\$3,214.3	\$2,366.0
Citywide Average	\$73.0	\$96.8	\$120.9	\$105.6	\$94.1	\$66.3	\$55.7	\$103.5	\$152.8	\$165.3

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	30.1	422.7	-77.1	69.9	-81.9	594.5	-69.8	-26.4	89.0
Civic Center	-12.5	-11.6	101.9	-50.1	-14.9	-19.7	180.3	-49.8	397.8
Financial	88.9	-10.2	-22.6	-25.5	-8.9	-28.5	107.5	47.3	4.7
Mission	-15.4	33.2	-26.9	30.8	-51.7	-0.6	25.4	9.8	-9.7
North Beach	8.0	-33.8	28.7	-28.0	66.5	-29.5	-3.5	5.0	-25.6
North Central	-0.5	-12.9	179.5	-50.6	-0.9	-43.8	51.6	-14.6	128.0
Northwest	5.4	7.6	1.0	50.9	-36.7	-24.7	23.0	-14.8	29.4
South of Market	28.9	99.8	-33.0	17.9	-51.7	-38.6	125.7	122.4	-19.8
Southwest	21.2	-18.9	-16.5	2.9	-4.2	7.4	0.4	-20.8	28.8
Van Ness	11.7	24.6	-0.6	17.8	-57.0	-5.9	-12.7	297.9	-40.8
Unclassified	-39.4	26.7	271.4	-94.9	-3.8	15.5	5,622.7	22.0	-26.4
Citywide Average	32.6	24.9	-12.6	-10.9	-29.5	-15.9	85.7	47.6	8.2

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.A
BUILDING PERMITS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2003-2012

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

Number of Permits

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	8	23	50	27	15	16	16	9	3	13
Civic Center	3	4	4	4	2	4	3	9	3	6
Financial	3	6	8	6	6	3	1	3	6	10
Mission	43	22	28	27	30	8	4	5	4	8
North Beach	6	5	2	1	0	1	0	0	1	1
North Central	18	16	42	23	18	14	2	11	7	17
Northwest	16	8	10	16	12	7	3	7	3	5
South of Market	38	30	38	32	23	20	7	8	19	21
Southwest	101	103	87	73	66	55	40	61	19	77
Van Ness	7	5	10	11	11	2	4	3	3	6
Unclassified	45	3	5	10	6	2	1	23	25	34
TOTAL	288	225	284	230	189	132	81	139	93	198

Annual Percentage Distribution

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	2.8	10.2	17.6	11.7	7.9	12.1	19.8	6.5	3.2	6.6
Civic Center	1.0	1.8	1.4	1.7	1.1	3.0	3.7	6.5	3.2	3.0
Financial	1.0	2.7	2.8	2.6	3.2	2.3	1.2	2.2	6.5	5.1
Mission	14.9	9.8	9.9	11.7	15.9	6.1	4.9	3.6	4.3	4.0
North Beach	2.1	2.2	0.7	0.4	0.0	0.8	0.0	0.0	1.1	0.5
North Central	6.3	7.1	14.8	10.0	9.5	10.6	2.5	7.9	7.5	8.6
Northwest	5.6	3.6	3.5	7.0	6.3	5.3	3.7	5.0	3.2	2.5
South of Market	13.2	13.3	13.4	13.9	12.2	15.2	8.6	5.8	20.4	10.6
Southwest	35.1	45.8	30.6	31.7	34.9	41.7	49.4	43.9	20.4	38.9
Van Ness	2.4	2.2	3.5	4.8	5.8	1.5	4.9	2.2	3.2	3.0
Unclassified	15.6	1.3	1.8	4.3	3.2	1.5	1.2	16.5	26.9	17.2
TOTAL	100.0									

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	187.5	117.4	-46.0	-44.4	6.7	0.0	-43.8	-66.7	333.3
Civic Center	33.3	0.0	0.0	-50.0	100.0	-25.0	200.0	-66.7	100.0
Financial	100.0	33.3	-25.0	0.0	-50.0	-66.7	200.0	100.0	66.7
Mission	-48.8	27.3	-3.6	11.1	-73.3	-50.0	25.0	-20.0	100.0
North Beach	-16.7	-60.0	-50.0	-100.0	--	-100.0	--	--	0.0
North Central	-11.1	162.5	-45.2	-21.7	-22.2	-85.7	450.0	-36.4	142.9
Northwest	-50.0	25.0	60.0	-25.0	-41.7	-57.1	133.3	-57.1	66.7
South of Market	-21.1	26.7	-15.8	-28.1	-13.0	-65.0	14.3	137.5	10.5
Southwest	2.0	-15.5	-16.1	-9.6	-16.7	-27.3	52.5	-68.9	305.3
Van Ness	-28.6	100.0	10.0	0.0	-81.8	100.0	-25.0	0.0	100.0
Unclassified	-93.3	66.7	100.0	-40.0	-66.7	-50.0	2,200.0	8.7	36.0
TOTAL	-21.9	26.2	-19.0	-17.8	-30.2	-38.6	71.6	-33.1	112.9

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2003-2012

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 2012 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 2012 \$ 000s)

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	\$20,160	\$30,370	\$340,513	\$19,936	\$69,438	\$5,121	\$107,696	\$22,237	\$774	\$48,616
Civic Center	\$30,173	\$15,626	\$39,403	\$104,606	\$2,506	\$11,670	\$11,460	\$92,222	\$25,815	\$66,390
Financial	\$51,175	\$620,058	\$508,139	\$303,762	\$149,041	\$10,816	\$18,678	\$191,087	\$580,796	\$667,546
Mission	\$58,045	\$44,844	\$62,536	\$45,851	\$36,686	\$4,086	\$3,585	\$6,828	\$4,640	\$4,247
North Beach	\$8,210	\$9,745	\$3,546	\$1,085	\$0	\$26,965	\$0	\$0	\$7,183	\$370
North Central	\$64,262	\$67,051	\$16,187	\$294,736	\$55,897	\$81,148	\$2,177	\$41,156	\$21,649	\$167,104
Northwest	\$17,725	\$9,089	\$17,706	\$11,860	\$74,894	\$17,635	\$2,440	\$4,390	\$2,772	\$2,825
South of Market	\$156,670	\$242,389	\$690,692	\$438,868	\$299,219	\$187,520	\$7,407	\$234,432	\$714,316	\$537,283
Southwest	\$144,155	\$88,097	\$85,085	\$65,264	\$59,220	\$71,046	\$98,524	\$90,127	\$12,834	\$65,565
Van Ness	\$40,458	\$38,447	\$63,834	\$43,342	\$93,703	\$5,903	\$14,982	\$5,405	\$147,025	\$53,245
Unclassified	\$38,240	\$19,897	\$25,561	\$41,924	\$3,283	\$1,679	\$5,496	\$371,552	\$580,530	\$506,683
TOTAL	\$629,273	\$1,185,613	\$1,853,202	\$1,371,234	\$843,887	\$423,589	\$272,445	\$1,059,436	\$2,098,334	\$2,119,874

Annual Percentage Distribution

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	3.2	2.6	18.4	1.5	8.2	1.2	39.5	2.1	0.0	2.3
Civic Center	4.8	1.3	2.1	7.6	0.3	2.8	4.2	8.7	1.2	3.1
Financial	8.1	52.3	27.4	22.2	17.7	2.6	6.9	18.0	27.7	31.5
Mission	9.2	3.8	3.4	3.3	4.3	1.0	1.3	0.6	0.2	0.2
North Beach	1.3	0.8	0.2	0.1	0.0	6.4	0.0	0.0	0.3	0.0
North Central	10.2	5.7	0.9	21.5	6.6	19.2	0.8	3.9	1.0	7.9
Northwest	2.8	0.8	1.0	0.9	8.9	4.2	0.9	0.4	0.1	0.1
South of Market	24.9	20.4	37.3	32.0	35.5	44.3	2.7	22.1	34.0	25.3
Southwest	22.9	7.4	4.6	4.8	7.0	16.8	36.2	8.5	0.6	3.1
Van Ness	6.4	3.2	3.4	3.2	11.1	1.4	5.5	0.5	7.0	2.5
Unclassified	6.1	1.7	1.4	3.1	0.4	0.4	2.0	35.1	27.7	23.9
TOTAL	100.0									

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	50.6	1,021.2	-94.1	248.3	-92.6	2,003.0	-79.4	-96.5	6,181.1
Civic Center	-48.2	152.2	165.5	-97.6	365.7	-1.8	704.7	-72.0	157.2
Financial	1,111.6	-18.0	-40.2	-50.9	-92.7	72.7	923.1	203.9	14.9
Mission	-22.7	39.5	-26.7	-20.0	-88.9	-12.3	90.5	-32.0	-8.5
North Beach	18.7	-63.6	-69.4	-100.0	--	-100.0	--	--	-94.8
North Central	4.3	-75.9	1,720.8	-81.0	45.2	-97.3	1,790.5	-47.4	671.9
Northwest	-48.7	94.8	-33.0	531.5	-76.5	-86.2	79.9	-36.9	1.9
South of Market	54.7	185.0	-36.5	-31.8	-37.3	-96.1	3,065.0	204.7	-24.8
Southwest	-38.9	-3.4	-23.3	-9.3	20.0	38.7	-8.5	-85.8	410.9
Van Ness	-5.0	66.0	-32.1	116.2	-93.7	153.8	-63.9	2,620.2	-63.8
Unclassified	-48.0	28.5	64.0	-92.2	-48.9	227.3	6,660.4	56.2	-12.7
TOTAL	88.4	56.3	-26.0	-38.5	-49.8	-35.7	288.9	98.1	1.0

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.2.C**AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 2003-2012**

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 2012 \$ 000s)

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	\$2,520	\$1,320	\$6,810	\$738	\$4,629	\$320	\$6,731	\$2,471	\$258	\$3,740
Civic Center	\$10,058	\$3,907	\$9,851	\$26,152	\$1,253	\$2,918	\$3,820	\$10,247	\$8,605	\$11,065
Financial	\$17,058	\$103,343	\$63,517	\$50,627	\$24,840	\$3,605	\$18,678	\$63,696	\$96,799	\$66,755
Mission	\$1,350	\$2,038	\$2,233	\$1,698	\$1,223	\$511	\$896	\$1,366	\$1,160	\$531
North Beach	\$1,368	\$1,949	\$1,773	\$1,085	--	\$26,965	--	--	\$7,183	\$370
North Central	\$3,570	\$4,191	\$385	\$12,815	\$3,105	\$5,796	\$1,089	\$3,741	\$3,093	\$9,830
Northwest	\$1,108	\$1,136	\$1,771	\$741	\$6,241	\$2,519	\$813	\$627	\$924	\$565
South of Market	\$4,123	\$8,080	\$18,176	\$13,715	\$13,010	\$9,376	\$1,058	\$29,304	\$37,596	\$25,585
Southwest	\$1,427	\$855	\$978	\$894	\$897	\$1,292	\$2,463	\$1,477	\$675	\$851
Van Ness	\$5,780	\$7,689	\$6,383	\$3,940	\$8,518	\$2,952	\$3,746	\$1,802	\$49,008	\$8,874
Unclassified	\$850	\$6,632	\$5,112	\$4,192	\$547	\$840	\$5,496	\$16,154	\$23,221	\$14,902
Citywide Average	\$2,185	\$5,269	\$6,525	\$5,962	\$4,465	\$3,209	\$3,364	\$7,622	\$22,563	\$10,706

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	-47.6	415.8	-89.2	526.9	-93.1	2,003.0	-63.3	-89.6	1,349.5
Civic Center	-61.2	152.2	165.5	-95.2	132.8	30.9	168.2	-16.0	28.6
Financial	505.8	-38.5	-20.3	-50.9	-85.5	418.1	241.0	52.0	-31.0
Mission	51.0	9.6	-24.0	-28.0	-58.2	75.5	52.4	-15.1	-54.2
North Beach	42.4	-9.0	-38.8	-100.0	--	-100.0	--	--	-94.8
North Central	17.4	-90.8	3,225.0	-75.8	86.7	-81.2	243.7	-17.3	217.8
Northwest	2.6	55.8	-58.1	742.0	-59.6	-67.7	-22.9	47.3	-38.9
South of Market	96.0	125.0	-24.5	-5.1	-27.9	-88.7	2,669.4	28.3	-31.9
Southwest	-40.1	14.3	-8.6	0.4	44.0	90.7	-40.0	-54.3	26.1
Van Ness	33.0	-17.0	-38.3	116.2	-65.4	26.9	-51.9	2,620.2	-81.9
Unclassified	680.5	-22.9	-18.0	-86.9	53.4	554.7	193.9	43.7	-35.8
Citywide Average	141.2	23.8	-8.6	-25.1	-28.1	4.8	126.6	196.0	-52.5

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.2.3.A**BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 2003-2012**

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

Number of Permits

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	748	617	656	655	691	603	528	542	575	635
Civic Center	814	819	764	736	956	841	724	658	735	736
Financial	2,886	3,267	3,629	3,419	3,629	3,237	2,607	2,509	2,882	3,213
Mission	2,062	2,003	1,954	2,025	1,929	1,951	1,778	1,867	1,784	1,839
North Beach	774	757	829	823	789	810	689	627	705	673
North Central	3,703	3,515	3,510	3,780	3,965	3,427	3,160	2,944	2,866	3,116
Northwest	2,400	2,550	2,453	2,443	2,357	2,447	1,878	1,881	1,917	1,904
South of Market	1,917	1,923	2,000	2,367	2,102	2,143	1,983	1,843	2,022	2,298
Southwest	9,355	9,717	9,214	9,285	9,206	8,532	7,480	7,450	7,284	7,435
Van Ness	1,109	1,095	1,025	1,152	1,467	1,153	960	1,046	1,088	1,208
Unclassified	96	140	117	70	124	84	220	20	187	191
TOTAL	25,864	26,403	26,151	26,755	27,215	25,228	22,007	21,387	22,045	23,248

Annual Percentage Distribution

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	2.9	2.3	2.5	2.4	2.5	2.4	2.4	2.5	2.6	2.7
Civic Center	3.1	3.1	2.9	2.8	3.5	3.3	3.3	3.1	3.3	3.2
Financial	11.2	12.4	13.9	12.8	13.3	12.8	11.8	11.7	13.1	13.8
Mission	8.0	7.6	7.5	7.6	7.1	7.7	8.1	8.7	8.1	7.9
North Beach	3.0	2.9	3.2	3.1	2.9	3.2	3.1	2.9	3.2	2.9
North Central	14.3	13.3	13.4	14.1	14.6	13.6	14.4	13.8	13.0	13.4
Northwest	9.3	9.7	9.4	9.1	8.7	9.7	8.5	8.8	8.7	8.2
South of Market	7.4	7.3	7.6	8.8	7.7	8.5	9.0	8.6	9.2	9.9
Southwest	36.2	36.8	35.2	34.7	33.8	33.8	34.0	34.8	33.0	32.0
Van Ness	4.3	4.1	3.9	4.3	5.4	4.6	4.4	4.9	4.9	5.2
Unclassified	0.4	0.5	0.4	0.3	0.5	0.3	1.0	0.1	0.8	0.8
TOTAL	100.0									

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	-17.5	6.3	-0.2	5.5	-12.7	-12.4	2.7	6.1	10.4
Civic Center	0.6	-6.7	-3.7	29.9	-12.0	-13.9	-9.1	11.7	0.1
Financial	13.2	11.1	-5.8	6.1	-10.8	-19.5	-3.8	14.9	11.5
Mission	-2.9	-2.4	3.6	-4.7	1.1	-8.9	5.0	-4.4	3.1
North Beach	-2.2	9.5	-0.7	-4.1	2.7	-14.9	-9.0	12.4	-4.5
North Central	-5.1	-0.1	7.7	4.9	-13.6	-7.8	-6.8	-2.6	8.7
Northwest	6.3	-3.8	-0.4	-3.5	3.8	-23.3	0.2	1.9	-0.7
South of Market	0.3	4.0	18.4	-11.2	2.0	-7.5	-7.1	9.7	13.6
Southwest	3.9	-5.2	0.8	-0.9	-7.3	-12.3	-0.4	-2.2	2.1
Van Ness	-1.3	-6.4	12.4	27.3	-21.4	-16.7	9.0	4.0	11.0
Unclassified	45.8	-16.4	-40.2	77.1	-32.3	161.9	-90.9	835.0	2.1
TOTAL	2.1	-1.0	2.3	1.7	-7.3	-12.8	-2.8	3.1	5.5

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, 2003-2012**

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 2012 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 2012 \$ 000s)

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	\$37,291	\$19,931	\$27,130	\$31,218	\$73,425	\$17,706	\$31,614	\$18,526	\$32,627	\$20,368
Civic Center	\$91,229	\$90,523	\$48,955	\$66,661	\$109,972	\$73,469	\$45,731	\$59,528	\$57,836	\$357,578
Financial	\$398,523	\$342,955	\$446,556	\$389,831	\$395,546	\$443,512	\$240,968	\$331,196	\$305,198	\$398,221
Mission	\$59,260	\$50,409	\$61,911	\$47,733	\$81,743	\$52,293	\$46,941	\$60,694	\$66,607	\$62,063
North Beach	\$47,393	\$48,852	\$38,278	\$51,421	\$35,796	\$35,373	\$37,670	\$33,049	\$31,801	\$27,819
North Central	\$127,477	\$113,829	\$142,903	\$180,121	\$190,922	\$129,627	\$106,295	\$112,149	\$106,371	\$154,554
Northwest	\$73,959	\$92,895	\$87,498	\$94,648	\$81,584	\$84,018	\$56,107	\$67,887	\$59,882	\$78,949
South of Market	\$166,260	\$176,701	\$179,294	\$253,997	\$429,472	\$165,261	\$191,556	\$191,784	\$310,588	\$421,513
Southwest	\$258,746	\$417,317	\$302,671	\$261,066	\$273,675	\$224,690	\$178,399	\$188,140	\$202,353	\$205,881
Van Ness	\$46,871	\$57,835	\$47,718	\$79,415	\$90,183	\$57,393	\$34,598	\$41,338	\$46,708	\$75,824
Unclassified	\$2,901	\$5,845	\$2,679	\$28,878	\$2,441	\$1,949	\$5,175	\$115,839	\$129,823	\$56,326
TOTAL	\$1,309,910	\$1,417,092	\$1,385,593	\$1,484,989	\$1,764,759	\$1,285,291	\$975,054	\$1,220,130	\$1,349,794	\$1,859,096

Annual Percentage Distribution

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	2.8	1.4	2.0	2.1	4.2	1.4	3.2	1.5	2.4	1.1
Civic Center	7.0	6.4	3.5	4.5	6.2	5.7	4.7	4.9	4.3	19.2
Financial	30.4	24.2	32.2	26.3	22.4	34.5	24.7	27.1	22.6	21.4
Mission	4.5	3.6	4.5	3.2	4.6	4.1	4.8	5.0	4.9	3.3
North Beach	3.6	3.4	2.8	3.5	2.0	2.8	3.9	2.7	2.4	1.5
North Central	9.7	8.0	10.3	12.1	10.8	10.1	10.9	9.2	7.9	8.3
Northwest	5.6	6.6	6.3	6.4	4.6	6.5	5.8	5.6	4.4	4.2
South of Market	12.7	12.5	12.9	17.1	24.3	12.9	19.6	15.7	23.0	22.7
Southwest	19.8	29.4	21.8	17.6	15.5	17.5	18.3	15.4	15.0	11.1
Van Ness	3.6	4.1	3.4	5.3	5.1	4.5	3.5	3.4	3.5	4.1
Unclassified	0.2	0.4	0.2	1.9	0.1	0.2	0.5	9.5	9.6	3.0
TOTAL	100.0									

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	-46.6	36.1	15.1	135.2	-75.9	78.5	-41.4	76.1	-37.6
Civic Center	-0.8	-45.9	36.2	65.0	-33.2	-37.8	30.2	-2.8	518.3
Financial	-13.9	30.2	-12.7	1.5	12.1	-45.7	37.4	-7.8	30.5
Mission	-14.9	22.8	-22.9	71.3	-36.0	-10.2	29.3	9.7	-6.8
North Beach	3.1	-21.6	34.3	-30.4	-1.2	6.5	-12.3	-3.8	-12.5
North Central	-10.7	25.5	26.0	6.0	-32.1	-18.0	5.5	-5.2	45.3
Northwest	25.6	-5.8	8.2	-13.8	3.0	-33.2	21.0	-11.8	31.8
South of Market	6.3	1.5	41.7	69.1	-61.5	15.9	0.1	61.9	35.7
Southwest	61.3	-27.5	-13.7	4.8	-17.9	-20.6	5.5	7.6	1.7
Van Ness	23.4	-17.5	66.4	13.6	-36.4	-39.7	19.5	13.0	62.3
Unclassified	101.5	-54.2	977.9	-91.5	-20.2	165.5	2138.4	12.1	-56.6
TOTAL	8.2	-2.2	7.2	18.8	-27.2	-24.1	25.1	10.6	37.7

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, 2003-2012**

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 2012 \$ 000s)

C&I District	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Bayview	\$49.9	\$32.5	\$41.5	\$48.2	\$106.4	\$29.5	\$60.3	\$34.1	\$57.0	\$32.1
Civic Center	\$113.0	\$110.4	\$64.2	\$90.6	\$113.5	\$87.2	\$63.3	\$88.3	\$78.8	\$485.8
Financial	\$138.1	\$105.1	\$123.6	\$114.0	\$109.0	\$137.0	\$92.4	\$132.1	\$105.9	\$123.9
Mission	\$28.8	\$25.1	\$31.5	\$23.6	\$42.1	\$27.0	\$26.8	\$32.6	\$37.3	\$33.7
North Beach	\$60.8	\$63.6	\$45.1	\$62.5	\$45.5	\$43.9	\$54.7	\$52.8	\$45.1	\$41.3
North Central	\$34.5	\$32.4	\$40.6	\$47.5	\$48.1	\$37.8	\$33.6	\$38.1	\$37.1	\$49.6
Northwest	\$30.8	\$36.4	\$35.8	\$38.9	\$34.7	\$34.4	\$29.9	\$36.2	\$31.3	\$41.5
South of Market	\$86.6	\$91.6	\$89.2	\$106.7	\$203.5	\$76.8	\$95.6	\$104.2	\$153.8	\$183.4
Southwest	\$27.6	\$43.0	\$32.8	\$28.1	\$29.8	\$26.4	\$23.9	\$25.3	\$27.8	\$27.7
Van Ness	\$42.2	\$53.1	\$46.6	\$69.1	\$61.8	\$50.0	\$36.2	\$39.4	\$43.0	\$62.8
Unclassified	\$31.9	\$43.0	\$23.5	\$424.7	\$19.5	\$22.1	\$22.8	\$742.6	\$694.2	\$294.9
Citywide Average	\$50.7	\$53.7	\$52.9	\$55.5	\$64.9	\$51.0	\$44.3	\$56.7	\$61.3	\$80.0

Percentage Change

C&I District	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Bayview	-34.8	27.6	16.1	120.9	-72.3	104.8	-43.6	67.5	-43.8
Civic Center	-2.3	-41.9	41.2	25.3	-23.2	-27.4	39.6	-10.8	516.6
Financial	-23.9	17.6	-7.8	-4.4	25.7	-32.5	42.9	-19.8	17.0
Mission	-12.8	25.6	-25.2	78.5	-36.0	-0.7	21.6	14.6	-9.6
North Beach	4.6	-29.1	38.6	-27.2	-3.4	24.4	-3.4	-14.6	-8.4
North Central	-6.0	25.4	17.1	1.2	-21.5	-11.1	13.5	-2.7	33.8
Northwest	18.0	-1.7	8.7	-10.8	-0.7	-13.1	20.8	-13.6	32.7
South of Market	5.8	-2.7	19.7	90.8	-62.3	24.5	9.0	47.7	19.2
Southwest	55.5	-23.6	-14.4	6.1	-11.6	-9.5	6.1	9.8	-0.4
Van Ness	25.8	-12.2	48.3	-10.6	-19.1	-27.6	9.0	9.1	45.8
Unclassified	34.8	-45.3	1707.1	-95.4	13.4	2.9	3157.2	-6.5	-57.5
Citywide Average	6.0	-1.4	4.8	16.9	-21.4	-13.1	28.0	8.0	30.6

Sources: San Francisco Planning Department; Department of Building Inspection

Table 6.3.A
**PERMIT APPLICATIONS
BY COMMERCE &
INDUSTRY DISTRICT AND
LAND USE CATEGORY,
2012**

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	49	71	53	2	38	419	31	663
Civic Center	186	172	3	43	25	303	61	793
Financial	2,291	393	6	68	45	393	247	3,443
Mission	73	246	34	25	60	1,394	48	1,880
North Beach	68	92	5	10	24	468	42	709
North Central	57	271	2	14	113	2,649	115	3,221
Northwest	30	117	7	2	46	1,690	61	1,953
South of Market	764	526	100	30	74	787	200	2,481
Southwest	110	390	14	5	144	6,797	196	7,656
Van Ness	62	148	6	23	37	922	56	1,254
Unclassified	23	16	1	2	13	54	134	243
TOTAL	3,713	2,442	231	224	619	15,876	1,191	24,296

Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	1.3	2.9	22.9	0.9	6.1	2.6	2.6	2.7
Civic Center	5.0	7.0	1.3	19.2	4.0	1.9	5.1	3.3
Financial	61.7	16.1	2.6	30.4	7.3	2.5	20.7	14.2
Mission	2.0	10.1	14.7	11.2	9.7	8.8	4.0	7.7
North Beach	1.8	3.8	2.2	4.5	3.9	2.9	3.5	2.9
North Central	1.5	11.1	0.9	6.3	18.3	16.7	9.7	13.3
Northwest	0.8	4.8	3.0	0.9	7.4	10.6	5.1	8.0
South of Market	20.6	21.5	43.3	13.4	12.0	5.0	16.8	10.2
Southwest	3.0	16.0	6.1	2.2	23.3	42.8	16.5	31.5
Van Ness	1.7	6.1	2.6	10.3	6.0	5.8	4.7	5.2
Unclassified	0.6	0.7	0.4	0.9	2.1	0.3	11.3	1.0
TOTAL	100.0							

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	7.4	10.7	8.0	0.3	5.7	63.2	4.7	100.0
Civic Center	23.5	21.7	0.4	5.4	3.2	38.2	7.7	100.0
Financial	66.5	11.4	0.2	2.0	1.3	11.4	7.2	100.0
Mission	3.9	13.1	1.8	1.3	3.2	74.1	2.6	100.0
North Beach	9.6	13.0	0.7	1.4	3.4	66.0	5.9	100.0
North Central	1.8	8.4	0.1	0.4	3.5	82.2	3.6	100.0
Northwest	1.5	6.0	0.4	0.1	2.4	86.5	3.1	100.0
South of Market	30.8	21.2	4.0	1.2	3.0	31.7	8.1	100.0
Southwest	1.4	5.1	0.2	0.1	1.9	88.8	2.6	100.0
Van Ness	4.9	11.8	0.5	1.8	3.0	73.5	4.5	100.0
Unclassified	9.5	6.6	0.4	0.8	5.3	22.2	55.1	100.0
TOTAL	15.3	10.1	1.0	0.9	2.5	65.3	4.9	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, 2012**

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 (2012 \$ 000s)

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	\$4,542	\$1,904	\$1,827	\$2	\$3,023	\$57,126	\$1,790	\$70,213
Civic Center	\$208,637	\$29,563	\$3,289	\$3,743	\$23,912	\$153,512	\$1,653	\$424,309
Financial	\$320,601	\$109,575	\$2,587	\$8,662	\$82,679	\$539,403	\$3,608	\$1,067,115
Mission	\$7,765	\$9,297	\$862	\$1,558	\$9,323	\$37,268	\$490	\$66,563
North Beach	\$4,465	\$3,645	\$177	\$285	\$2,338	\$16,416	\$963	\$28,290
North Central	\$5,958	\$12,188	\$1	\$275	\$20,756	\$281,825	\$1,696	\$322,699
Northwest	\$1,987	\$21,728	\$85	\$28	\$2,252	\$55,524	\$260	\$81,863
South of Market	\$177,374	\$78,317	\$5,080	\$4,603	\$154,571	\$534,208	\$7,147	\$961,299
Southwest	\$7,420	\$19,068	\$3,221	\$5,119	\$15,998	\$219,417	\$18,067	\$288,311
Van Ness	\$2,283	\$7,698	\$506	\$6,589	\$21,985	\$82,863	\$7,857	\$129,782
Unclassified	\$384,534	\$12,549	\$1	\$700	\$570	\$162,911	\$13,675	\$574,939
TOTAL	\$1,125,567	\$305,532	\$17,636	\$31,564	\$337,407	\$2,140,473	\$57,205	\$4,015,383

Annual Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	0.4	0.6	10.4	0.0	0.9	2.7	3.1	1.7
Civic Center	18.5	9.7	18.7	11.9	7.1	7.2	2.9	10.6
Financial	28.5	35.9	14.7	27.4	24.5	25.2	6.3	26.6
Mission	0.7	3.0	4.9	4.9	2.8	1.7	0.9	1.7
North Beach	0.4	1.2	1.0	0.9	0.7	0.8	1.7	0.7
North Central	0.5	4.0	0.0	0.9	6.2	13.2	3.0	8.0
Northwest	0.2	7.1	0.5	0.1	0.7	2.6	0.5	2.0
South of Market	15.8	25.6	28.8	14.6	45.8	25.0	12.5	23.9
Southwest	0.7	6.2	18.3	16.2	4.7	10.3	31.6	7.2
Van Ness	0.2	2.5	2.9	20.9	6.5	3.9	13.7	3.2
Unclassified	34.2	4.1	0.0	2.2	0.2	7.6	23.9	14.3
TOTAL	100.0							

Annual Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	6.5	2.7	2.6	0.0	4.3	81.4	2.5	100.0
Civic Center	49.2	7.0	0.8	0.9	5.6	36.2	0.4	100.0
Financial	30.0	10.3	0.2	0.8	7.7	50.5	0.3	100.0
Mission	11.7	14.0	1.3	2.3	14.0	56.0	0.7	100.0
North Beach	15.8	12.9	0.6	1.0	8.3	58.0	3.4	100.0
North Central	1.8	3.8	0.0	0.1	6.4	87.3	0.5	100.0
Northwest	2.4	26.5	0.1	0.0	2.8	67.8	0.3	100.0
South of Market	18.5	8.1	0.5	0.5	16.1	55.6	0.7	100.0
Southwest	2.6	6.6	1.1	1.8	5.5	76.1	6.3	100.0
Van Ness	1.8	5.9	0.4	5.1	16.9	63.8	6.1	100.0
Unclassified	66.9	2.2	0.0	0.1	0.1	28.3	2.4	100.0
TOTAL	28.0	7.6	0.4	0.8	8.4	53.3	1.4	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, 2012

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 (2012 \$ 000s)

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	Average
Bayview	\$92.7	\$26.8	\$34.5	\$0.9	\$79.6	\$136.3	\$57.8	\$105.9
Civic Center	\$1,121.7	\$171.9	\$1,096.4	\$87.0	\$956.5	\$506.6	\$27.1	\$535.1
Financial	\$139.9	\$278.8	\$431.1	\$127.4	\$1,837.3	\$1,372.5	\$14.6	\$309.9
Mission	\$106.4	\$37.8	\$25.4	\$62.3	\$155.4	\$26.7	\$10.2	\$35.4
North Beach	\$65.7	\$39.6	\$35.4	\$28.5	\$97.4	\$35.1	\$22.9	\$39.9
North Central	\$104.5	\$45.0	\$0.5	\$19.6	\$183.7	\$106.4	\$14.7	\$100.2
Northwest	\$66.2	\$185.7	\$12.1	\$13.8	\$49.0	\$32.9	\$4.3	\$41.9
South of Market	\$232.2	\$148.9	\$50.8	\$153.4	\$2,088.8	\$678.8	\$35.7	\$387.5
Southwest	\$67.5	\$48.9	\$230.1	\$1,023.9	\$111.1	\$32.3	\$92.2	\$37.7
Van Ness	\$36.8	\$52.0	\$84.4	\$286.5	\$594.2	\$89.9	\$140.3	\$103.5
Unclassified	\$16,718.8	\$784.3	\$1.0	\$350.0	\$43.8	\$3,016.9	\$102.0	\$2,366.0
Citywide Average	\$303.1	\$125.1	\$76.3	\$140.9	\$545.1	\$134.8	\$48.0	\$165.3

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, 2012

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

Number of Permits

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	13	4	2,425	1,109	162	3,713
Retail	20	13	1,486	710	213	2,442
PDR	5	1	115	93	17	231
Hotel	8	0	120	78	18	224
CIE	3	0	312	241	63	619
Residential	93	20	10,386	4,657	720	15,876
Other	15	22	398	424	332	1,191
TOTAL	157	60	15,242	7,312	1,525	24,296

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	8.3	6.7	15.9	15.2	10.6	15.3
Retail	12.7	21.7	9.7	9.7	14.0	10.1
PDR	3.2	1.7	0.8	1.3	1.1	1.0
Hotel	5.1	0.0	0.8	1.1	1.2	0.9
CIE	1.9	0.0	2.0	3.3	4.1	2.5
Residential	59.2	33.3	68.1	63.7	47.2	65.3
Other	9.6	36.7	2.6	5.8	21.8	4.9
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	0.4	0.1	65.3	29.9	4.4	100.0
Retail	0.8	0.5	60.9	29.1	8.7	100.0
PDR	2.2	0.4	49.8	40.3	7.4	100.0
Hotel	3.6	0.0	53.6	34.8	8.0	100.0
CIE	0.5	0.0	50.4	38.9	10.2	100.0
Residential	0.6	0.1	65.4	29.3	4.5	100.0
Other	1.3	1.8	33.4	35.6	27.9	100.0
TOTAL	0.6	0.2	62.7	30.1	6.3	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, 2012

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 (2012 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$540	\$915	\$352,047	\$376,407	\$395,658	\$1,125,567
Retail	\$4,140	\$648	\$89,373	\$188,860	\$22,511	\$305,532
PDR	\$31	\$500	\$3,497	\$12,152	\$1,456	\$17,636
Hotel	\$223	\$0	\$11,804	\$13,544	\$5,994	\$31,564
CIE	\$5,264	\$0	\$21,937	\$275,604	\$34,602	\$337,407
Residential	\$65,030	\$1,202	\$202,960	\$1,034,761	\$836,521	\$2,140,473
Other	\$540	\$114	\$7,658	\$25,960	\$22,934	\$57,205
TOTAL	\$75,768	\$3,379	\$689,276	\$1,927,286	\$1,319,675	\$4,015,383

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.7	27.1	51.1	19.5	30.0	28.0
Retail	5.5	19.2	13.0	9.8	1.7	7.6
PDR	0.0	14.8	0.5	0.6	0.1	0.4
Hotel	0.3	0.0	1.7	0.7	0.5	0.8
CIE	6.9	0.0	3.2	14.3	2.6	8.4
Residential	85.8	35.6	29.4	53.7	63.4	53.3
Other	0.7	3.4	1.1	1.3	1.7	1.4
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	0.0	0.1	31.3	33.4	35.2	100.0
Retail	1.4	0.2	29.3	61.8	7.4	100.0
PDR	0.2	2.8	19.8	68.9	8.3	100.0
Hotel	0.7	0.0	37.4	42.9	19.0	100.0
CIE	1.6	0.0	6.5	81.7	10.3	100.0
Residential	3.0	0.1	9.5	48.3	39.1	100.0
Other	0.9	0.2	13.4	45.4	40.1	100.0
TOTAL	1.9	0.1	17.2	48.0	32.9	100.0

Table 6.4.1.C
AVERAGE CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2012

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 (2012 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$41.5	\$228.8	\$145.2	\$339.4	\$2,442.3	\$303.1
Retail	\$207.0	\$49.8	\$60.1	\$266.0	\$105.7	\$125.1
PDR	\$6.2	\$500.0	\$30.4	\$130.7	\$85.6	\$76.3
Hotel	\$27.9	--	\$98.4	\$173.6	\$333.0	\$140.9
CIE	\$1,754.7	--	\$70.3	\$1,143.6	\$549.2	\$545.1
Residential	\$699.2	\$60.1	\$19.5	\$222.2	\$1,161.8	\$134.8
Other	\$36.0	\$5.2	\$19.2	\$61.2	\$69.1	\$48.0
TOTAL	\$482.6	\$56.3	\$45.2	\$263.6	\$865.4	\$165.3

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, 2012**

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

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	6	0	381	239	37	663
Civic Center	9	7	451	249	77	793
Financial	26	19	2,182	1,052	164	3,443
Mission	13	2	1,192	563	110	1,880
North Beach	4	2	441	223	39	709
North Central	16	10	2,000	1,007	188	3,221
Northwest	11	3	1,253	586	100	1,953
South of Market	14	9	1,445	858	155	2,481
Southwest	57	5	5,113	2,159	322	7,656
Van Ness	1	3	784	371	95	1,254
Unclassified	0	0	0	5	238	243
TOTAL	157	60	15,242	7,312	1,525	24,296

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	3.8	0.0	2.5	3.3	2.4	2.7
Civic Center	5.7	11.7	3.0	3.4	5.0	3.3
Financial	16.6	31.7	14.3	14.4	10.8	14.2
Mission	8.3	3.3	7.8	7.7	7.2	7.7
North Beach	2.5	3.3	2.9	3.0	2.6	2.9
North Central	10.2	16.7	13.1	13.8	12.3	13.3
Northwest	7.0	5.0	8.2	8.0	6.6	8.0
South of Market	8.9	15.0	9.5	11.7	10.2	10.2
Southwest	36.3	8.3	33.5	29.5	21.1	31.5
Van Ness	0.6	5.0	5.1	5.1	6.2	5.2
Unclassified	0.0	0.0	0.0	0.1	15.6	1.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	0.9	0.0	57.5	36.0	5.6	100.0
Civic Center	1.1	0.9	56.9	31.4	9.7	100.0
Financial	0.8	0.6	63.4	30.6	4.8	100.0
Mission	0.7	0.1	63.4	29.9	5.9	100.0
North Beach	0.6	0.3	62.2	31.5	5.5	100.0
North Central	0.5	0.3	62.1	31.3	5.8	100.0
Northwest	0.6	0.2	64.2	30.0	5.1	100.0
South of Market	0.6	0.4	58.2	34.6	6.2	100.0
Southwest	0.7	0.1	66.8	28.2	4.2	100.0
Van Ness	0.1	0.2	62.5	29.6	7.6	100.0
Unclassified	0.0	0.0	0.0	2.1	97.9	100.0
TOTAL	0.6	0.2	62.7	30.1	6.3	100.0

Table 6.4.2.B
TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2012

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 (2012 \$ 000s)

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	\$112	\$0	\$10,661	\$26,170	\$33,270	\$70,213
Civic Center	\$28,365	\$54	\$32,913	\$354,423	\$8,554	\$424,309
Financial	\$4,595	\$595	\$268,278	\$509,518	\$284,128	\$1,067,115
Mission	\$3,170	\$27	\$24,905	\$32,184	\$6,277	\$66,563
North Beach	\$355	\$9	\$14,494	\$11,299	\$2,134	\$28,290
North Central	\$24,430	\$852	\$49,375	\$192,888	\$55,154	\$322,699
Northwest	\$1,882	\$194	\$27,865	\$45,926	\$5,996	\$81,863
South of Market	\$1,206	\$1,437	\$143,527	\$536,375	\$278,755	\$961,299
Southwest	\$11,562	\$177	\$96,697	\$143,584	\$36,291	\$288,311
Van Ness	\$90	\$35	\$20,560	\$74,641	\$34,456	\$129,782
Unclassified	\$0	\$0	\$0	\$279	\$574,660	\$574,939
TOTAL	\$75,768	\$3,379	\$689,276	\$1,927,286	\$1,319,675	\$4,015,383

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	0.1	0.0	1.5	1.4	2.5	1.7
Civic Center	37.4	1.6	4.8	18.4	0.6	10.6
Financial	6.1	17.6	38.9	26.4	21.5	26.6
Mission	4.2	0.8	3.6	1.7	0.5	1.7
North Beach	0.5	0.3	2.1	0.6	0.2	0.7
North Central	32.2	25.2	7.2	10.0	4.2	8.0
Northwest	2.5	5.7	4.0	2.4	0.5	2.0
South of Market	1.6	42.5	20.8	27.8	21.1	23.9
Southwest	15.3	5.2	14.0	7.5	2.7	7.2
Van Ness	0.1	1.0	3.0	3.9	2.6	3.2
Unclassified	0.0	0.0	0.0	0.0	43.5	14.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	0.2	0.0	15.2	37.3	47.4	100.0
Civic Center	6.7	0.0	7.8	83.5	2.0	100.0
Financial	0.4	0.1	25.1	47.7	26.6	100.0
Mission	4.8	0.0	37.4	48.4	9.4	100.0
North Beach	1.3	0.0	51.2	39.9	7.5	100.0
North Central	7.6	0.3	15.3	59.8	17.1	100.0
Northwest	2.3	0.2	34.0	56.1	7.3	100.0
South of Market	0.1	0.1	14.9	55.8	29.0	100.0
Southwest	4.0	0.1	33.5	49.8	12.6	100.0
Van Ness	0.1	0.0	15.8	57.5	26.5	100.0
Unclassified	0.0	0.0	0.0	0.0	100.0	100.0
TOTAL	1.9	0.1	17.2	48.0	32.9	100.0

Table 6.4.2.C
AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2012

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 (2012 \$ 000s)

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	\$18.7	--	\$28.0	\$109.5	\$899.2	\$105.9
Civic Center	\$3,151.7	\$7.7	\$73.0	\$1,423.4	\$111.1	\$535.1
Financial	\$176.7	\$31.3	\$123.0	\$484.3	\$1,732.5	\$309.9
Mission	\$243.9	\$13.4	\$20.9	\$57.2	\$57.1	\$35.4
North Beach	\$88.8	\$4.5	\$32.9	\$50.7	\$54.7	\$39.9
North Central	\$1,526.9	\$85.2	\$24.7	\$191.5	\$293.4	\$100.2
Northwest	\$171.1	\$64.5	\$22.2	\$78.4	\$60.0	\$41.9
South of Market	\$86.1	\$159.6	\$99.3	\$625.1	\$1,798.4	\$387.5
Southwest	\$202.8	\$35.4	\$18.9	\$66.5	\$112.7	\$37.7
Van Ness	\$90.0	\$11.7	\$26.2	\$201.2	\$362.7	\$103.5
Unclassified	--	--	--	\$55.8	\$2,414.5	\$2,366.0
TOTAL	\$482.6	\$56.3	\$45.2	\$263.6	\$865.4	\$165.3

Note: Other represents those permits still in the pipeline.

Sources: San Francisco Planning Department; Department of Building Inspection

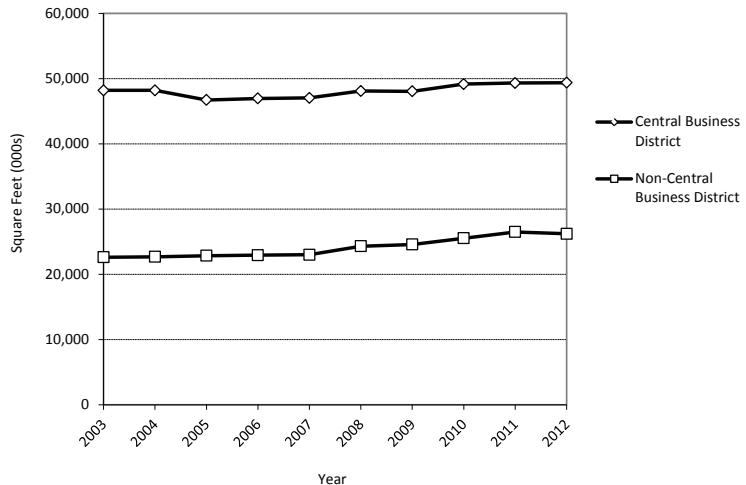
Table & Figure 6.5
TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 2003-2012

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	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Central Business District	48,192	48,198	46,719	46,956	47,026	48,084	48,039	49,158	49,310	49,368
Non-Central Business District	22,622	22,686	22,845	22,932	22,996	24,300	24,569	25,539	26,488	26,205
TOTAL	70,814	70,884	69,564	69,888	70,022	72,384	72,608	74,697	75,798	75,573

Percentage Change

Location	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Central Business District	0.0	-3.1	0.5	0.1	2.3	-0.1	2.3	0.3	0.1
Non-Central Business District	0.3	0.7	0.4	0.3	5.7	1.1	3.9	3.7	-1.1
TOTAL	0.1	-1.9	0.5	0.2	3.4	0.3	2.9	1.5	-0.3



Planning Department Plan Areas

0 Miles 1

MAP 6.2

Table 6.6
LAND USE SQUARE FOOTAGE BY PLAN AREA, 2012

This table conveys the area square footage for each land use category for the 20 plan 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
Geary	12,513.4	1,035.8	183.5	916.8	130.4	2,758.5	76.8	962.5	832.8	413.7	112.7	19,936.9
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
Presidio	51.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	65,583.8	69.8	0.0	65,704.8
Rest of the City	350,402.5	15,682.5	4,704.5	7,353.2	6,548.3	51,374.8	2,147.1	7,829.3	201,122.0	19,510.3	2,909.4	669,583.9
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/Potter 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

CONTINUED >

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2011 (CONTINUED)

Percentage Distribution by Planning Area

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
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
Geary	62.8	5.2	0.9	4.6	0.7	13.8	0.4	4.8	4.2	2.1	0.6	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
Presidio	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	99.8	0.1	0.0	100.0
Rest of the City	52.3	2.3	0.7	1.1	1.0	7.7	0.3	1.2	30.0	2.9	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

Plan Area	Residential	Mixed Res	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
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
Geary	3.0	3.8	1.2	5.4	0.2	3.7	1.8	3.8	0.3	0.8	2.8	2.0
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
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.7	0.1	0.0	6.6
Rest of the City	82.8	58.0	30.0	43.5	11.5	69.5	49.4	30.8	69.6	37.9	71.5	67.8
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											

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



Photo by Thomas Hawk

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). This data includes biennial mode splits from 2006 through 2012.

7.2 PARKING ENTITLEMENTS

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

For the purposes of this chapter, annual parking entitlements were obtained from the Planning Department database. The data are the number of off-street parking spaces approved by the Planning Commission, Zoning Administrator, and Major Environmental Review section of the Department as part of the permit approval process.

The parking entitlement data are included in *Table 7.2*. The total number of projects and corresponding parking spaces for calendar years 2008 through 2012 are listed by zoning district.

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 Fiscal Years 2008 (2007-08) and 2012 (2011-12), are reported in *Table 7.4*. This table provides ridership data for all of MUNI's existing transit routes throughout the city, including trolley and motorcoach bus service as well as light rail service.

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 2012 dollars.

Table 7.1 MODE SPLIT FOR COMMUTERS, 2006-2012

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					
	2006	2008	2009	2010	2011	2012	2006	2008	2009	2010	2011	2012
Drive Alone	40.5	38.4	38.9	36.0	37.6	36.3	37.7	36.5	36.6	35.3	37.1	35.0
Carpool/Vanpool	7.7	8.4	7.4	7.9	7.3	7.7	10.5	11.1	11.0	10.5	9.5	9.7
Transit	30.3	31.9	31.8	34.1	31.6	33.1	35.8	36.4	35.6	37.5	36.0	38.3
Walk	9.6	9.4	10.3	9.4	9.9	9.8	6.9	6.7	7.6	7.1	7.0	7.1
Bicycle	2.3	2.7	3.0	3.5	3.4	3.8	1.5	2.0	2.2	2.6	2.5	2.7
Work at Home	7.6	7.5	6.8	6.7	7.8	6.7	5.4	5.3	4.8	5.0	5.6	4.9
Other	2.0	1.7	1.8	2.4	2.3	2.6	2.2	2.0	2.2	1.9	2.3	2.2
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

Source: US Census, American Community Surveys.

Table 7.2
**PARKING ENTITLEMENTS
 BY PLANNING
 COMMISSION, ZONING
 ADMINISTRATOR OR
 MAJOR ENVIRONMENTAL
 ANALYSIS, 2008-2012**

Table 7.2 presents the most recent data on parking projects and spaces entitled by either the Planning Commission, Zoning Administrator, or the Department's Major Environmental Analysis section.

Zoning District	2008		2009		2010		2011		2012	
	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces
C-2	0	0	0	0	1	-25	1	-1	1	4
C-3-G	2	270	2	-80	0	225	1	113	0	0
C-3-O	0	0	1	15	0	0	1	129	0	0
C-3-O(SD)	0	0	0	0	1	10	0	0	1	0
C-3-R	0	25	0	0	0	0	1	40	0	0
C-3-S	1	52	0	0	0	0	0	0	0	0
CRNC	0	0	0	0	0	0	0	0	1	-1
C-M	0	0	1	156	0	0	0	0	0	0
M-1	0	0	1	421	0	0	0	0	1	168
PDR-1-D	0	0	0	0	0	0	0	0	1	7
PDR-2	0	0	0	0	0	0	1	20	0	0
NC-1	0	0	0	0	0	0	0	0	1	0
NC-2	3	125	0	0	0	0	0	0	0	0
NC-3	4	157	1	126	1	0	1	0	1	-8
HAIGHT	1	129	0	0	1	0	0	0	0	0
24th St-Mission	0	0	1	9	0	0	0	0	0	0
INNER SUNSET	0	0	0	0	0	0	0	0	0	0
PACIFIC	0	0	0	0	0	0	0	0	0	0
POLK	0	0	1	32	2	31	0	0	1	10
UPR MARKET NCD	0	0	0	0	0	0	0	0	1	26
NCT-2	0	0	0	0	0	0	0	0	1	0
NCT-3	1	30	2	63	2	39	0	0	0	0
UPR MARKET NCT	1	15	0	0	0	0	0	0	1	44
Valencia St NCT	1	17	0	0	0	0	1	22	0	0
Mission St NCT	0	0	0	0	0	0	1	0	0	0
HAYES NCT	1	-20	0	0	1	4	1	-32	1	7
HAYES NCT/RTO	0	0	0	0	0	0	0	0	1	126
Ocean Avenue NCT	0	0	1	175	0	0	0	0	0	0
Ocean Avenue NCT/P	0	0	0	0	1	-16	0	0	0	0
RC-3	0	0	0	0	1	38	0	0	0	0
RC-4	2	180	3	-4,495	1	670	0	0	1	520
RED	0	0	1	6	0	0	0	0	0	0
RED/SLR	0	0	0	0	0	0	0	0	0	0
RH DTR	0	0	1	2	0	0	1	358	1	19
RH-1	0	0	1	25	3	78	1	0	2	-1
RH-2	0	0	0	0	0	0	5	5	1	1
RH-3	1	28	0	0	1	1	3	7	0	0
RM-1	1	739	1	20	1	3	1	43	1	-1
RM-1/RM-4	0	0	0	0	0	0	1	6,975	0	0
RM-2	0	0	0	0	0	0	2	3	0	0
RM-3	2	312	0	0	0	0	1	2	0	0
RM-4	0	0	0	0	0	0	0	0	0	0
RSD	0	0	1	7	0	0	0	0	0	0
RTO	0	0	0	0	3	107	2	30	1	0
RTO-Mission	0	0	0	0	1	-1	0	0	1	0
SLI	1	85	1	-53	1	14	0	0	0	0
SLR	0	0	1	18	1	0	0	0	0	0
SPD	0	0	0	0	0	0	0	0	1	2
UMU	0	1	0	0	3	-87	4	594	1	8
MUG	0	0	0	0	0	0	0	0	0	0
MUO	0	0	1	18	0	0	0	0	0	0
MUR	0	0	1	11	2	204	0	0	1	24
WMUG	0	0	0	0	0	0	0	0	1	358
P	0	0	0	0	0	0	0	0	1	241
TOTAL	22	2,145	23	-3,524	28	1,295	30	8,308	26	1,554

- Note:**
- "C" refers to commercial districts
 - "DTR" refers to downtown residential districts
 - "M" refers to PDR districts
 - "MU" and "UMU" refers to mixed use districts
 - "NC" and named areas refer to neighborhood commercial districts
 - "P" refers to the public district
 - "R" refers to residential districts
 - "S" refers to support activity districts

Source: San Francisco Planning Department

Table 7.3
PRIVATE VEHICLE OCCUPANCY IN San Francisco, 2004-2012

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

Population	2004	2006	2008	2009	2010	2011	2012
San Francisco Residents	1.20	1.11	1.14	1.16	1.15	1.13	1.14

Sources: US Census American Community Survey.

Table 7.4
TRANSIT RIDERSHIP ON MUNI LINES, 2008 & 2012

Table 7.4 presents data on average daily ridership on MUNI lines for 2008 and 2012.

Daily Ridership by Route

Route Nos.	Route Name	2008	2012	Difference	% Change
1, 1AX, 1BX	California	27,920	28,870	950	3.4%
2	Clement	7,543	5,853	-1,690	-22.4%
3	Jackson	4,300	3,376	-924	-21.5%
5	Fulton	15,192	17,158	1,966	12.9%
6	Parnassus	8,294	10,543	2,249	27.1%
9, 9L, 8X, 8AX, 8BX	San Bruno	48,008	59,921	11,913	24.8%
10	Townsend	3,744	5,631	1,887	50.4%
12	Folsom	7,002	4,281	-2,721	-38.9%
14, 14L, 14X	Mission	42,167	44,162	1,995	4.7%
16AX, 16BX	Noriega Express	1,872	1,565	-307	-16.4%
17	Parkmerced	846	735	-111	-13.1%
18	46th Avenue	3,147	3,758	611	19.4%
19	Polk	9,302	7,699	-1,603	-17.2%
21	Hayes	12,930	11,353	-1,577	-12.2%
22	Fillmore	18,384	17,772	-612	-3.3%
23	Monterey	4,486	4,278	-208	-4.6%
24	Divisadero	10,746	10,662	-84	-0.8%
27	Bryant	8,202	7,939	-263	-3.2%
28, 28L	19th Avenue	11,691	14,423	2,732	23.4%
29	Sunset	15,938	0	-15,938	-100.0%
30, 30X	Stockton	32,931	35,238	2,307	7.0%
31, 31AX, 31BX	Balboa	11,146	10,985	-161	-1.4%
33	Stanyan	4,921	6,101	1,180	24.0%
35	Eureka	589	850	261	44.4%
36	Teresita	1,115	1,246	131	11.8%
598,548	Corbett	1,533	1,742	209	13.6%
38, 38L, 38AX, 38BX	Geary	52,786	55,042	2,256	4.3%
39	Coit	677	859	182	26.9%
41	Union	3,235	3,533	298	9.2%
43	Masonic	12,258	14,600	2,342	19.1%
44	O'Shaughnessy	15,679	15,875	196	1.2%
45	Union–Stockton	15,827	12,149	-3,678	-23.2%
47	Van Ness	12,070	12,338	268	2.2%

Source:
 San Francisco Municipal
 Transportation Agency

CONTINUED >

TABLE 7.4
TRANSIT RIDERSHIP ON
MUNI LINES, 2008 & 2012
(CONTINUED)

Daily Ridership by Route

Route Nos.	Route Name	2008	2012	Difference	% Change
48	Quintara–24th Street	11,685	11,210	-475	-4.1%
49	Van Ness–Mission	29,776	27,427	-2,349	-7.9%
52	Excelsior	2,178	2,050	-128	-5.9%
54	Felton	6,789	6,628	-161	-2.4%
56	Rutland	473	605	132	28.0%
66	Quintara	567	687	120	21.2%
67	Bernal Heights	2,667	1,253	-1,414	-53.0%
71, 71L	Haight-Noriega	13,417	13,566	149	1.1%
80X	Gateway Express	66	12	-54	-81.9%
81X	Caltrain Express	200	251	51	25.7%
82X	Levi Plaza	274	1,060	786	287.1%
88	BART Shuttle	640	431	-209	-32.7%
90	Owl	197	217	20	10.1%
91	Owl	358	497	139	38.7%
108	Treasure Island	2,898	3,455	557	19.2%
F	Market	18,920	23,449	4,529	23.9%
J	Church	13,335	14,988	1,653	12.4%
K	Ingleside	31,654	31,637	-17	-0.1%
L	Taraval	28,746	26,566	-2,180	-7.6%
M	Ocean View	25,260	27,270	2,010	8.0%
N	Judah	40,783	40,529	-254	-0.6%
Discontinued Routes					
4	Sutter	2,080	na	na	na
7	Haight	1,611	na	na	na
26	Valencia	3,350	na	na	na
53	Southern Heights	1,116	na	na	na
89	Laguna Honda	106	na	na	na
		TOTAL	657,364	664,326	6,962
					1.1%

Table 7.5
**TRANSIT IMPACT
DEVELOPMENT FEE
(TIDF) REVENUE
COLLECTED (INFLATION-
ADJUSTED), FISCAL
YEARS 2004-2013**

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2004 (July 1, 2003 - June 30, 2004) in 2012 dollars.

Fiscal Year	Fee Structure	Collections (2012 \$)
2003-2004	1981 Ordinance	\$1,653,736
2004-2005	2004 Ordinance	\$1,123,157
2005-2006	2004 Ordinance	\$1,368,596
2006-2007	2004 Ordinance	\$2,258,413
2007-2008	2007 Ordinance	\$982,666
2008-2009	2007 Ordinance	\$4,896,433
2009-2010	2007 Ordinance	\$1,982,335
2010-2011	2010 Ordinance	\$1,105,162
2011-2012	2010 Ordinance	\$1,735,281
2012-2013	2010 Ordinance	\$4,574,916

Source: San Francisco Municipal Transportation Agency

Acknowledgements

Mayor

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