

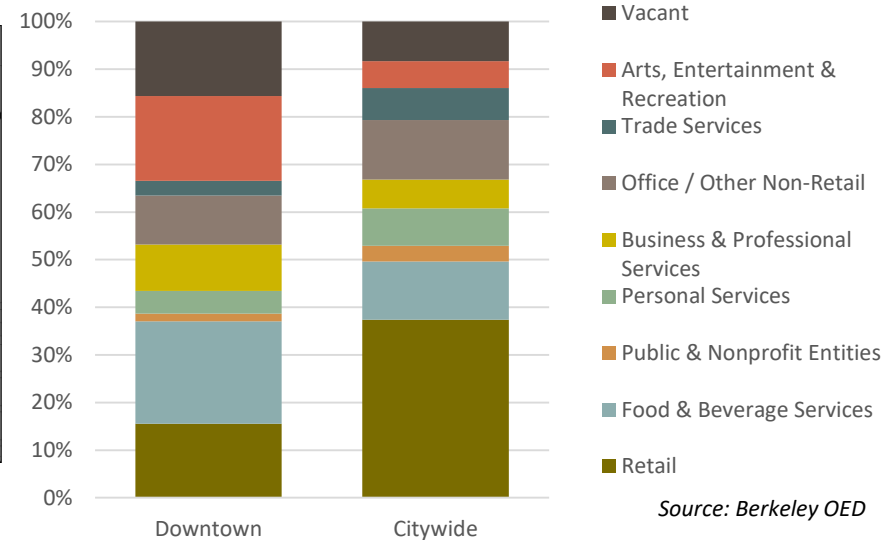
# Downtown: 2021 Snapshot



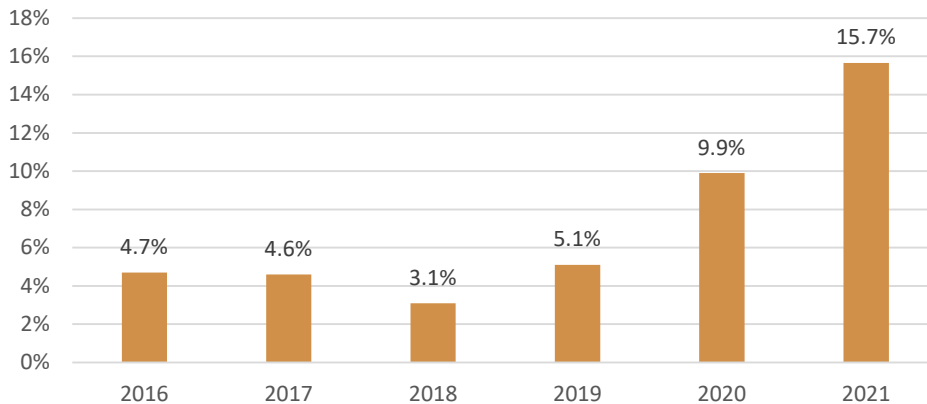
Downtown Berkeley serves as the City's core commercial district, meeting the daily needs of residents, students, workers, and visitors. The district benefits from a significant concentration of arts and entertainment uses, which occupy 17.8% of total ground floor commercial space in the district compared to 5.6% citywide. As of Q3 2021, the vacancy rate in Downtown is 15.7%, which has more than tripled since late 2019 (5.1%). Sales tax revenue generated in 2021 by Food & Beverage services dropped to \$580,079 from \$934,966 in 2020 (-38%) but Retail sales tax collected increased by \$34,223 (+6%).



## Ground Floor Commercial Business Mix (by Square Footage), 2021 Q3

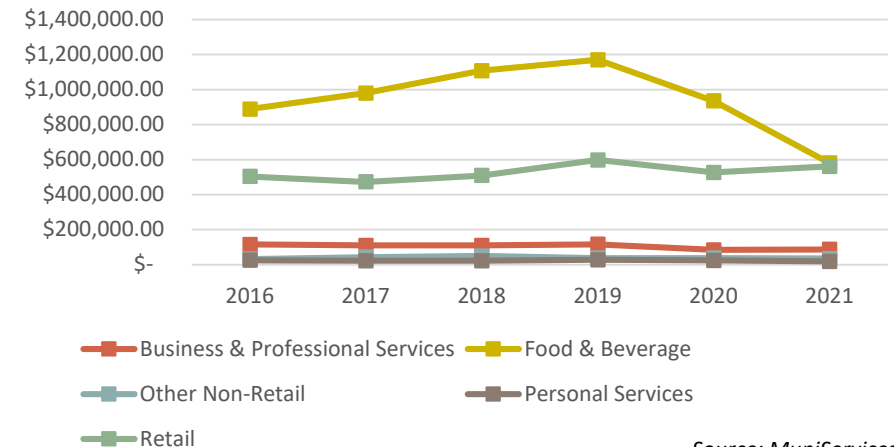


## Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2016-2021



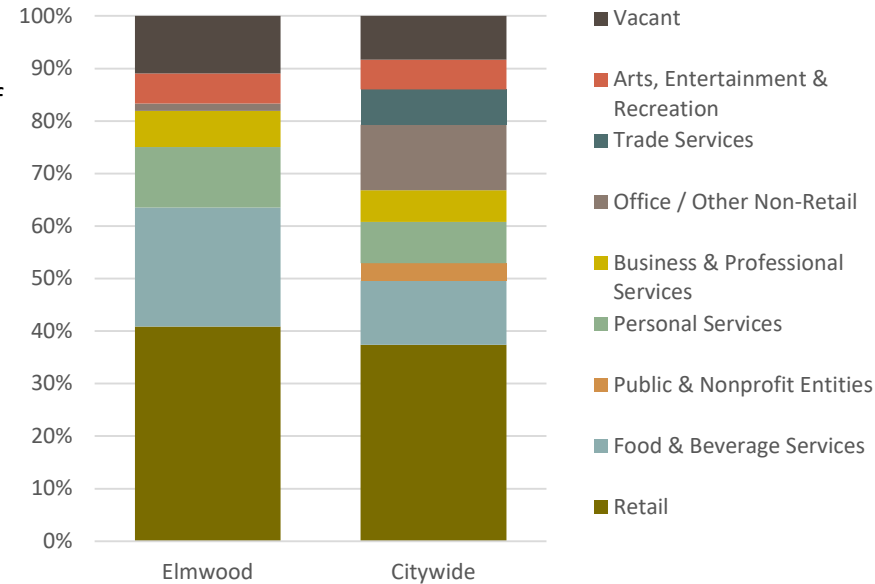
# Elmwood: 2021 Snapshot



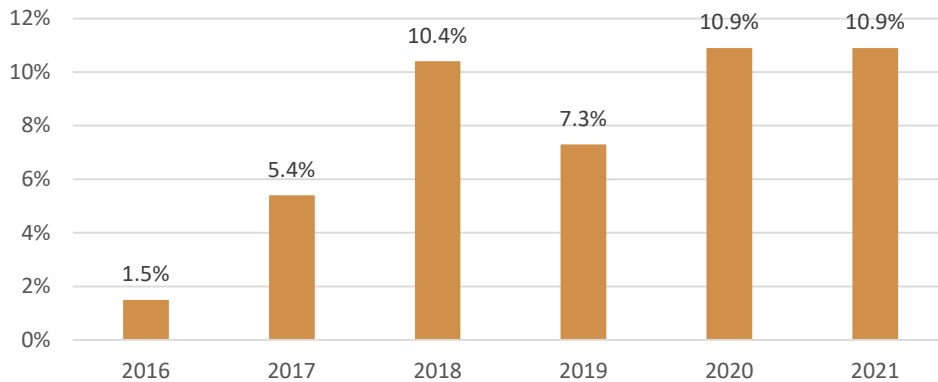
The Elmwood is a compact three block commercial district along College Avenue near the Berkeley-Oakland border and the neighboring Rockridge shopping district. The Elmwood district is characterized by a high concentration (22.7%) of Food & Beverage services and Personal Services (11.5%), and is a walkable, neighborhood-serving commercial district. As of Q3 2021, the district's vacancy rate by square footage is 10.91%, which is close to no change from 2020 Q4 (10.95%). Sales tax collected from the Food and Beverage sector in the Elmwood decreased by \$33,157, from 2020 to 2021, and by \$13,315 for Retail, as indoor capacity for retail shopping was limited, and indoor dining was still restricted due to the pandemic.



## Business Mix (by Square Footage), 2021 Q3

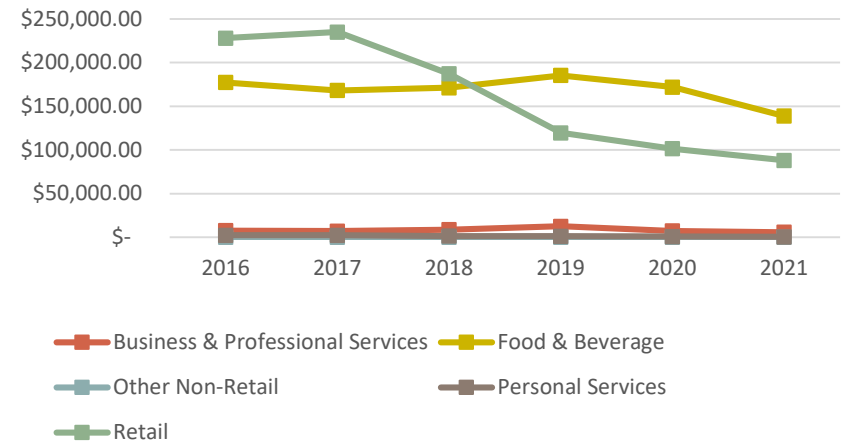


## Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021



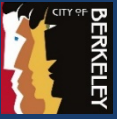
Source: Berkeley OED

## Sales Tax Revenue by Sector, 2016-2021



Source: MuniServices

# North Shattuck: 2021 Snapshot

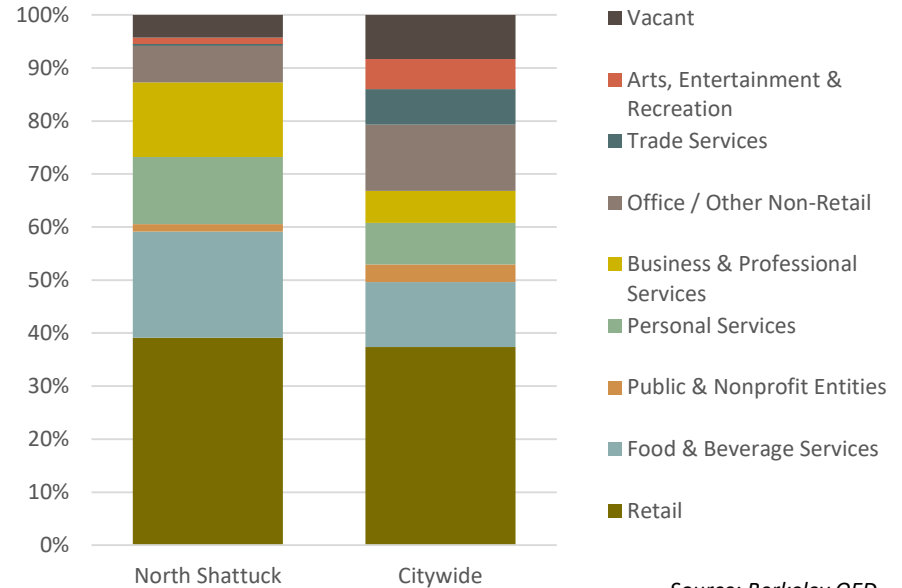


North Shattuck is one of Berkeley's oldest commercial districts, located just north of Downtown. The district is characterized by a high concentration of well-known, long-standing, and celebrated restaurants, including Chez Panisse and the Cheeseboard. North Shattuck is both a walkable, neighborhood-serving commercial district as well as a global destination for food and dining. As of Q3 2021, the district's vacancy rate by square footage is 4.29%, which is close to no change from the rate of 4.32% in 2020 Q4.

Sales tax collected from the Food and Beverage sector in North Shattuck decreased by \$137,925, from 2020 to 2021, and by \$56,071 for Retail, as indoor capacity for retail shopping was limited, and indoor dining was restricted due to the pandemic.

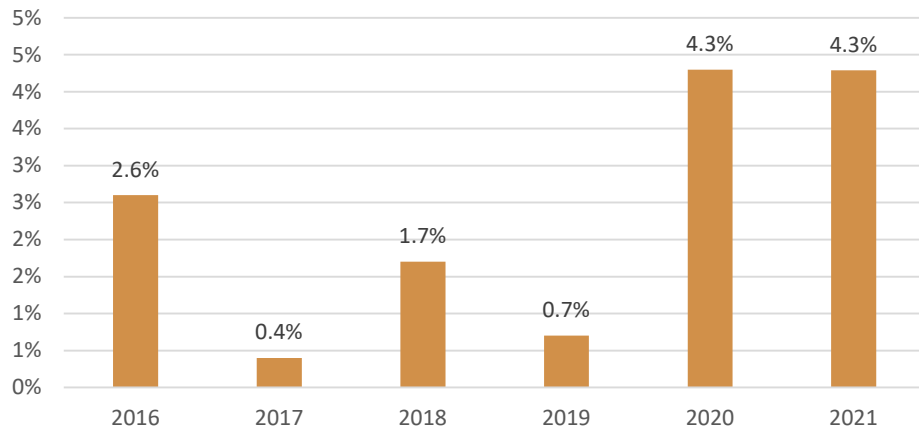


## Business Mix (by Square Footage), 2021 Q3



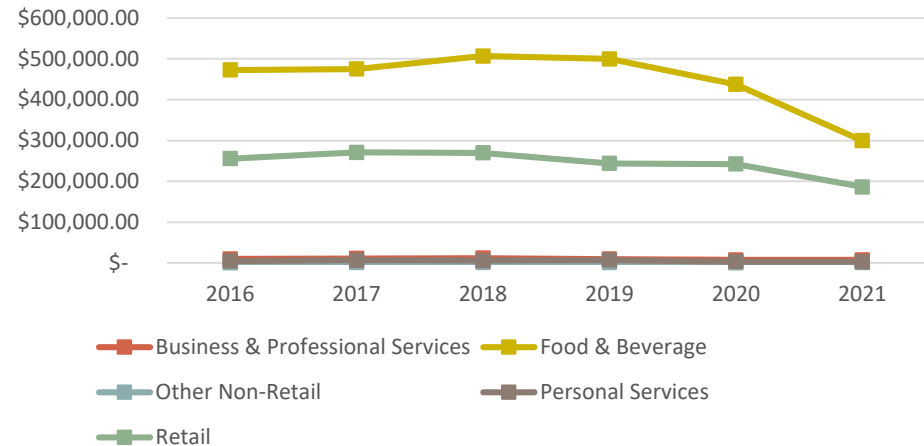
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021



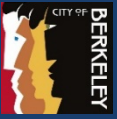
Source: Berkeley OED

## Sales Tax Revenue by Sector, 2016-2021



Source: MuniServices

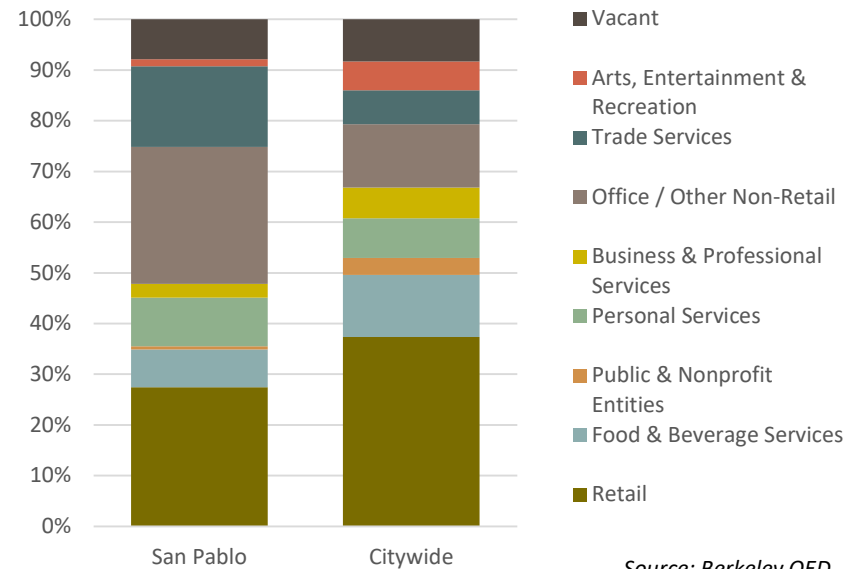
# San Pablo: 2021 Snapshot



San Pablo Avenue is Berkeley's largest commercial corridor, running the entire north-south length of the City. San Pablo is characterized by a high concentration of Trade Services (15.9%), including over 50 automobile services. San Pablo functions more as a regional destination for specific uses rather than a walkable, neighborhood-serving commercial district; as such, it features smaller percentages of Food & Beverage Services (7.4%) and Personal Services (9.6%). In Q3 2021, the district's vacancy rate by square footage was 7.9%, up from 4.9% in Q4 2020 and also up from the average rate of 5.2% over the 5 years before 2021. Retail Sales tax revenue collected in 2021 has increased by \$56,445 since 2020, and continues to be the largest source of tax revenue for the area.

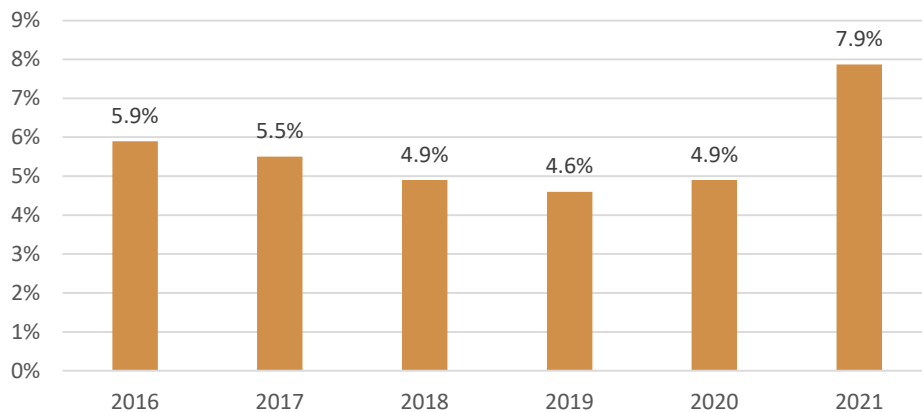


## Business Mix (by Square Footage), 2021 Q3



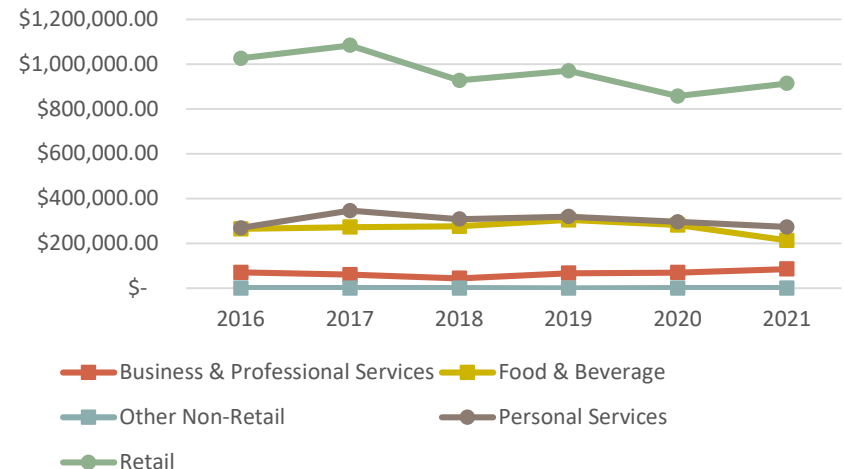
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rates (by Square Footage), 2016-2021



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2016-2021



Source: MuniServices

# Solano: 2021 Snapshot

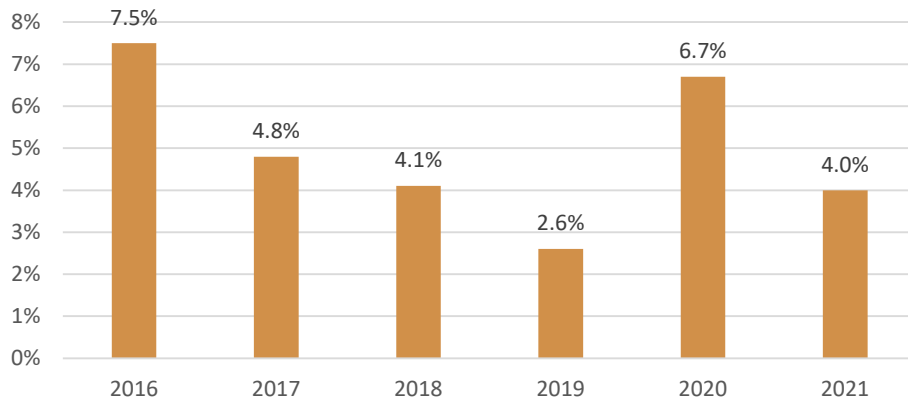


Solano is a small commercial district in North Berkeley, with a total of 147 commercial spaces and approximately 274,800 square feet of commercial space. It shares a border with Albany and is situated next to a large elementary school and an active neighborhood of single-family homes. Solano has a large key asset (the former Oaks Theatre) that was due to be occupied by a climbing gym in late 2021 and should be open soon. The district's vacancy rate by square footage is 4.0%, a 2.7% decrease from Q3 2021 (6.7%).



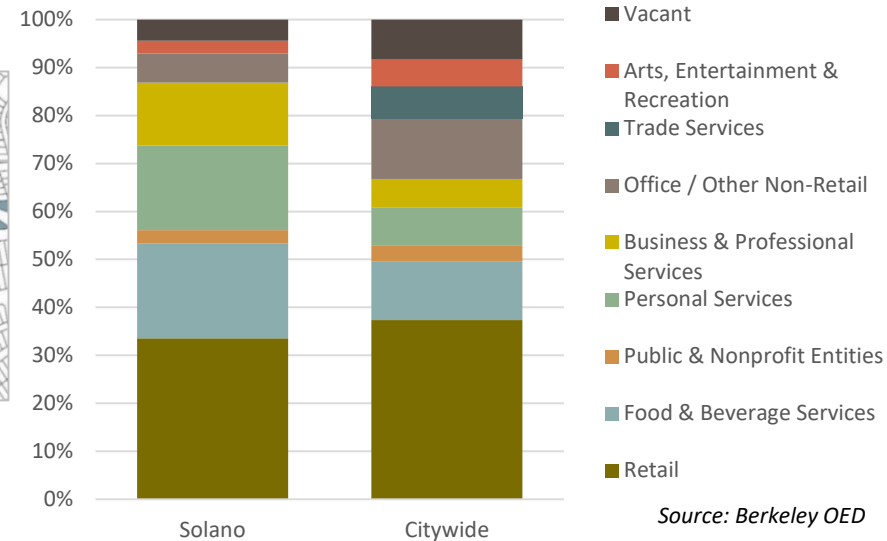
Sales tax collected from the Food and Beverage sector along Solano Avenue decreased by \$15,554, from 2020 to 2021, and by \$8,932.18 for Retail, as indoor capacity for retail shopping was limited, and indoor dining was restricted due to the pandemic.

**Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021**



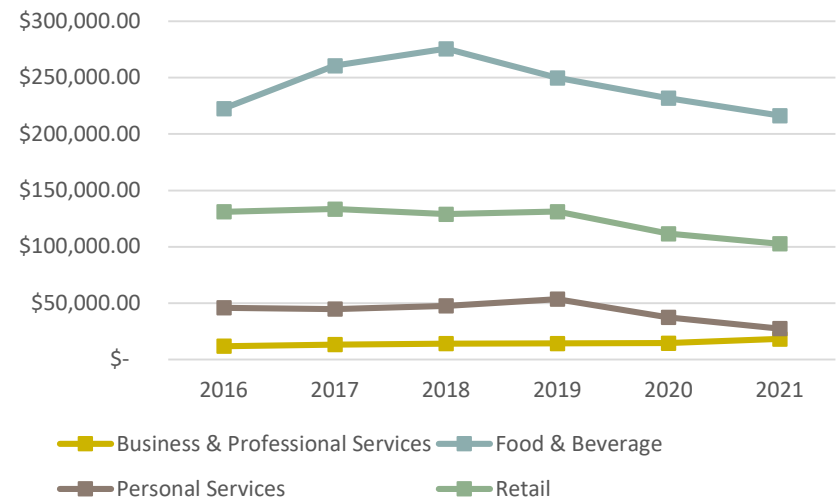
Source: Berkeley OED

**Business Mix (by Square Footage), 2021 Q3**



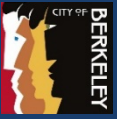
Source: Berkeley OED

**Sales Tax Revenue by Sector, 2016-2021**

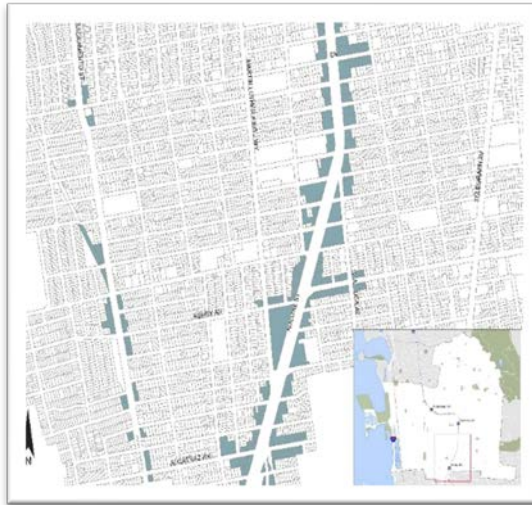


Source: MuniServices

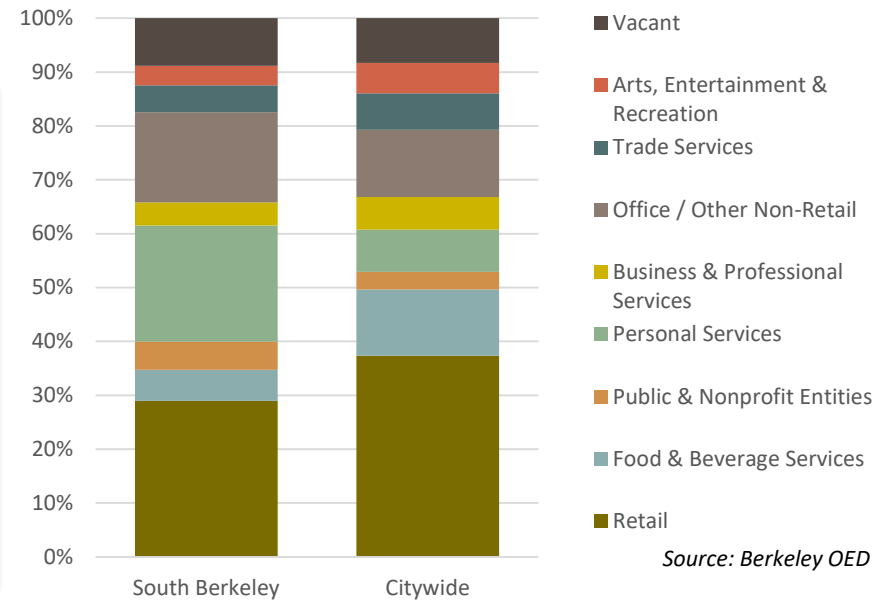
# South Berkeley: 2021 Snapshot



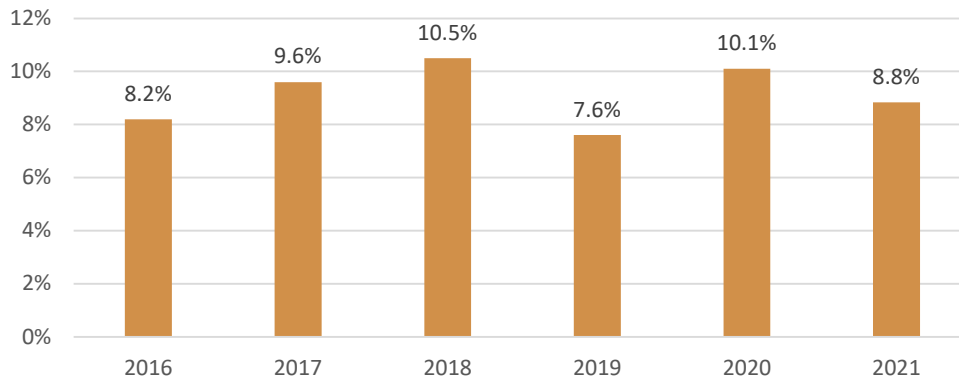
South Berkeley is a large district stretching over an area known for its cultural diversity and includes the Lorin District, the Sacramento corridor, and the South Shattuck area. South Berkeley includes several car dealerships, which accrue significant retail sales tax revenue for the City. The area also features a high concentration of Personal Services businesses (21.6% vs. 7.8% citywide) but is under-served by Food & Beverage services, which account for only 5.8% of ground floor commercial space, as compared to 12.3% citywide. As of Q3 2021, the district's vacancy rate by square footage was 8.8%, a 1.3% decrease from 2020.



## Business Mix (by Square Footage), 2021 Q3

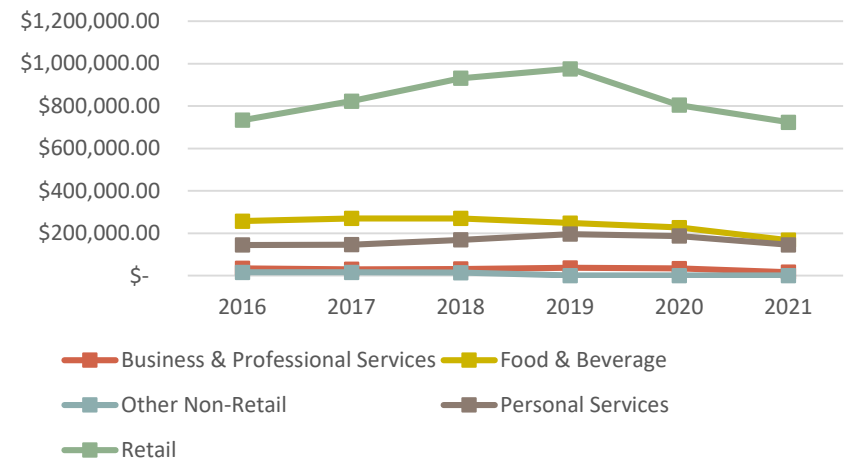


## Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021



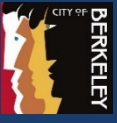
Source: Berkeley OED

## Sales Tax Revenue by Sector, 2016-2021



Source: MuniServices

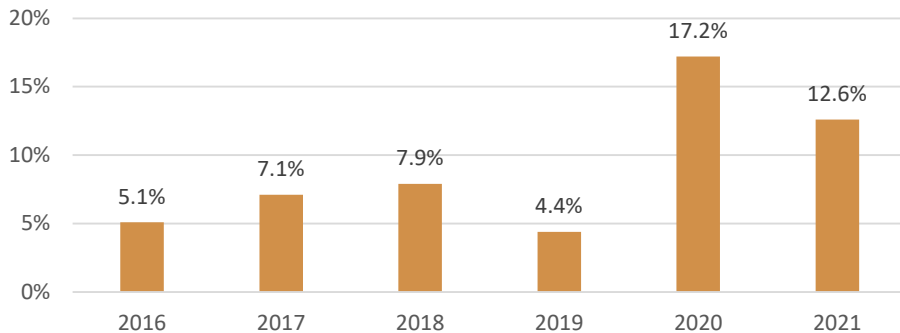
# Telegraph: 2021 Snapshot



The Telegraph district has undergone significant change with respect to its ground floor inventory over the past several years. Food & Beverage services have shown a dramatic increase since 2012, with 31.0% of Food & Beverage services accounting for ground floor commercial space in the district, as compared to 12.3% Citywide. As of Q3 2021, the district's ground floor commercial vacancy rate of 12.6% has decreased from 2020's record high of 17.2%. This can be attributed to new ground floor leases and developments along Telegraph Avenue in 2021 that will continue into 2022, including the large Enclave Building at Telegraph and Haste that currently contains student housing and is offering many new ground floor commercial spaces.

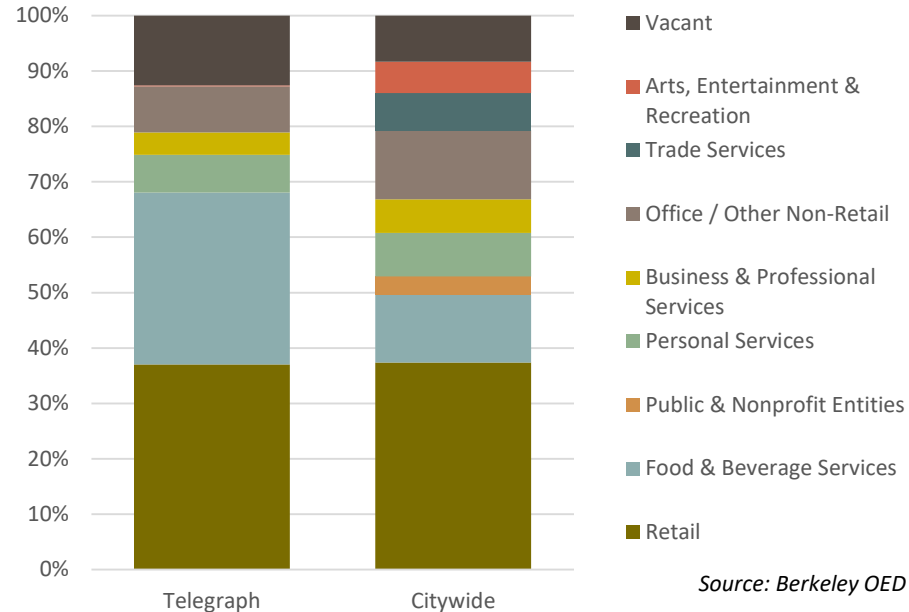


**Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021**



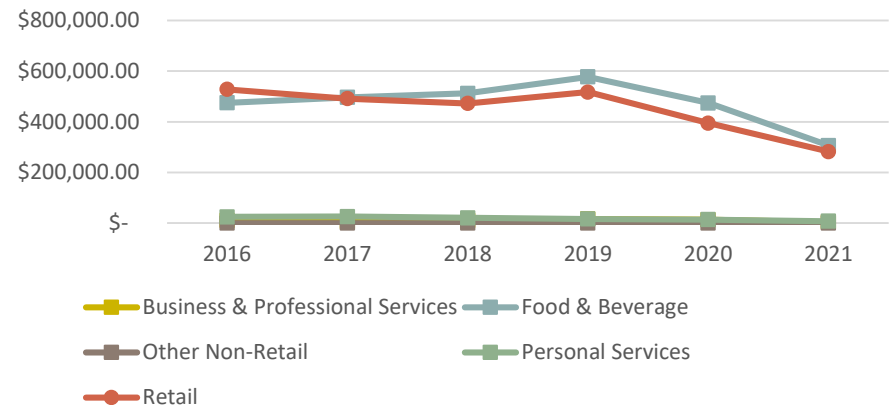
Source: Berkeley OED

**Business Mix (by Square Footage), 2021 Q3**



Source: Berkeley OED

**Sales Tax Revenue by Sector, 2016-2021**



Source: MuniServices

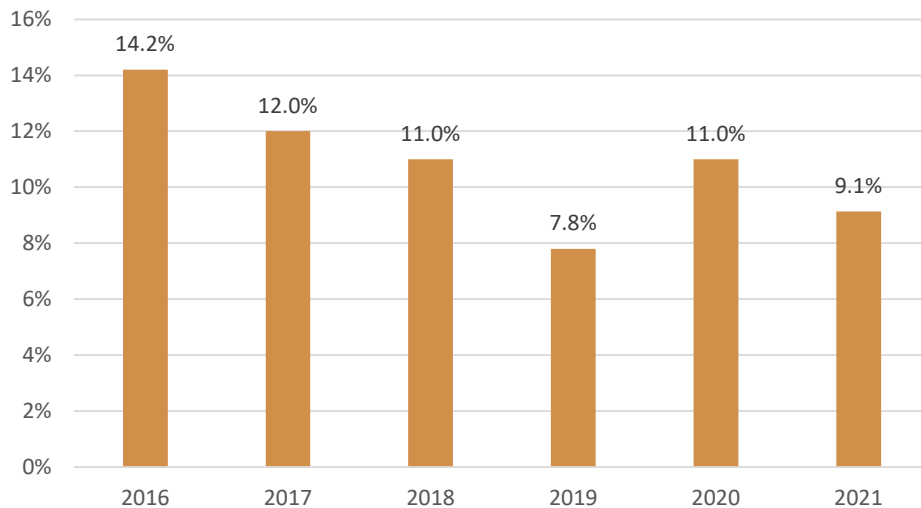
# University: 2021 Snapshot



University Avenue, from Martin Luther King Jr Way to the waterfront, spans many of the City's neighborhoods and serves as the gateway to the UC Berkeley Campus. From 2016 to 2020, Food & Beverage Services has generated the most sales tax revenue for the district. In 2021, Retail sales tax eclipsed funds from Food & Beverage. Retail sales tax collected in 2021 increased by \$116,785.63 from 2020, passing pre-pandemic levels. The 2021 vacancy rate decreased by 1.9% from 2020 to 9.1%.

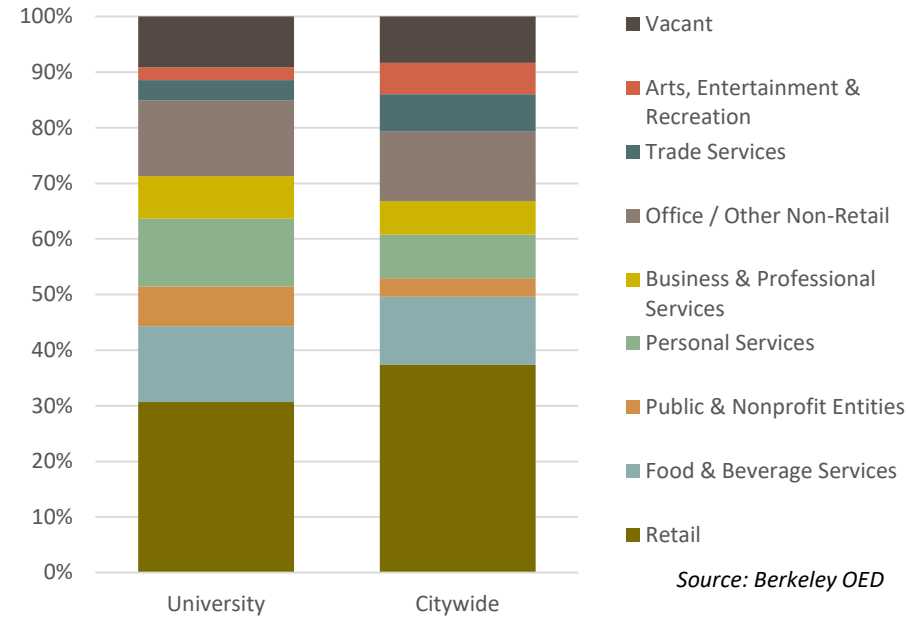


### Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021



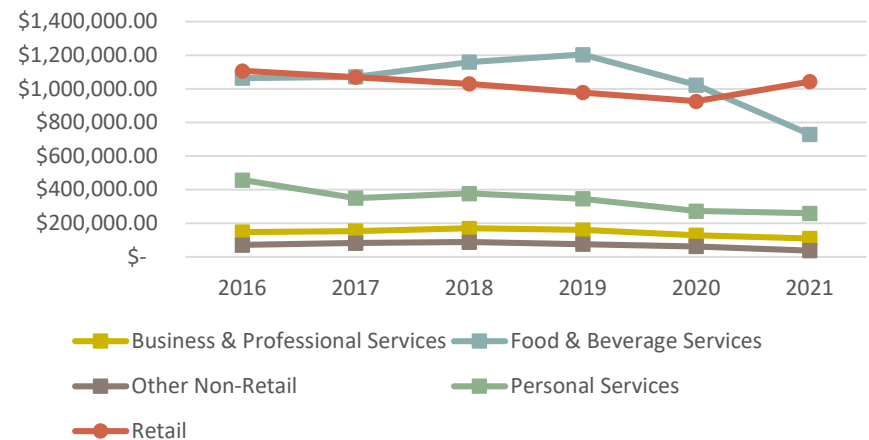
Source: Berkeley OED

### Business Mix (by Square Footage), 2021 Q3



Source: Berkeley OED

### Sales Tax Revenue by Sector, 2016-2021



Source: MuniServices



# West Berkeley: 2021 Snapshot

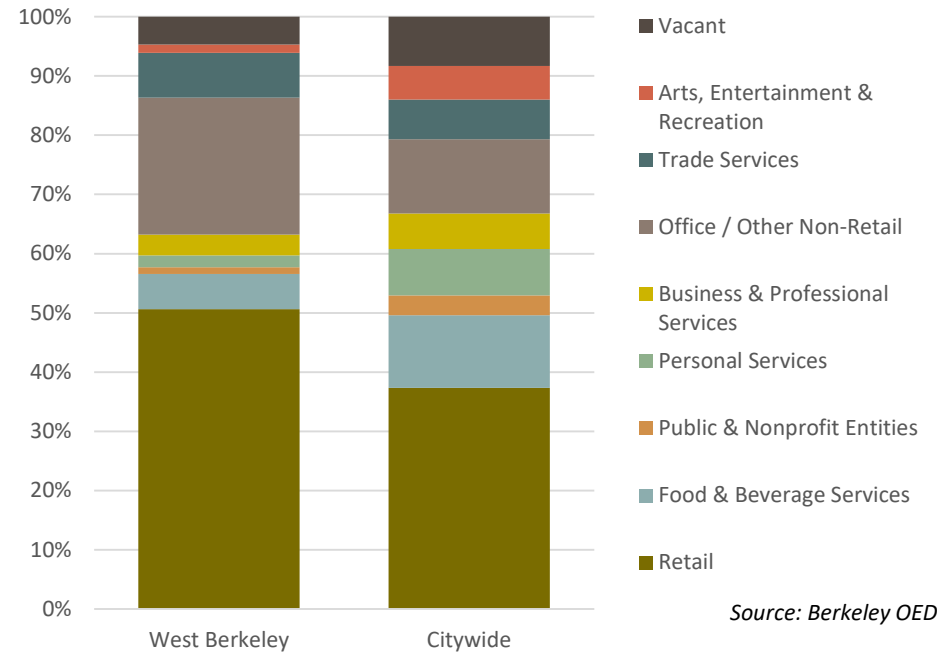


West Berkeley represents all commercial spaces west of San Pablo Avenue, including 4<sup>th</sup> Street and the Gilman Corridor. There are a number of major, large-floor-plate retailers, and a dense cluster of home supplies and construction businesses. There is also a higher percentage of non-retail commercial uses, including manufacturing and warehousing. Retail accounts for 50.7% of ground floor commercial space in the district, as compared to 37.4% citywide.

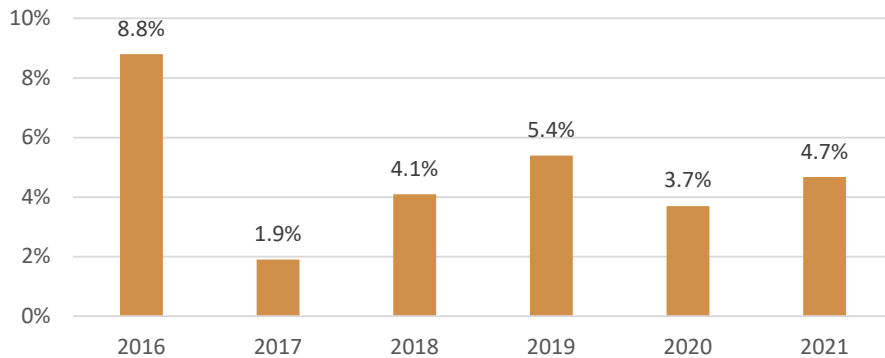
West Berkeley also has a smaller percentage of square footage devoted to Food and Beverage (5.9%) businesses than the citywide rate of 12.3%. The commercial vacancy rate in Q3 of 2021 is 4.7%, an increase from 2020's 3.7%. Sales tax revenue has increased in this area everywhere except Food & Beverage and Personal Services for an overall Sales tax revenue increase of \$71,501 (+1.1%).



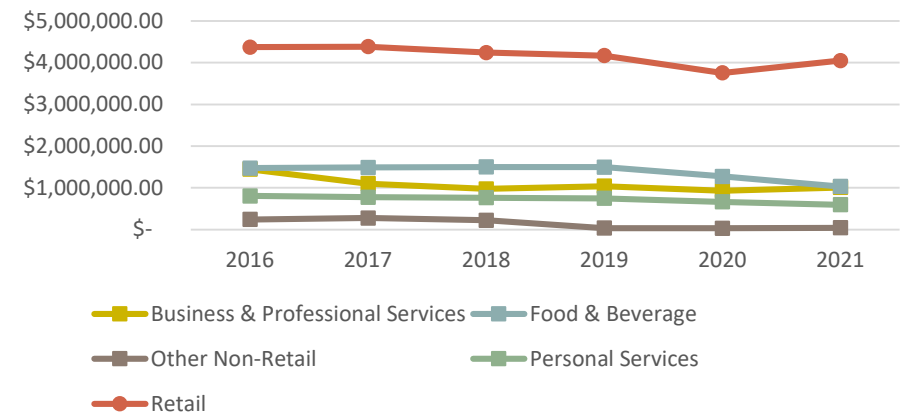
## Business Mix (by Square Footage), 2021 Q3



## Ground Floor Commercial Vacancy Rate (by Square Footage), 2016-2021



## Sales Tax Revenue by Sector, 2016-2021



Source: Berkeley OED

Source: MuniServices

# Neighborhood (C-N): 2021 Snapshot



Across Berkeley there are **11** smaller commercial pockets, zoned as “C-N” or “Neighborhood Commercial.” These areas are not more than one or two block collections of commercial enterprises that are distributed throughout Berkeley (see map).

Taken together, the “C-N” areas represent nearly 190 commercial spaces, and approximately 300,000 square feet of commercial space. The C-N areas collectively generate 3.5% of the city’s total sales tax. They also include a few large Arts, Entertainment and Recreation facilities (23.1% by square footage) and Public and Non-Profit entities (25.8% compared to 3.3% citywide).

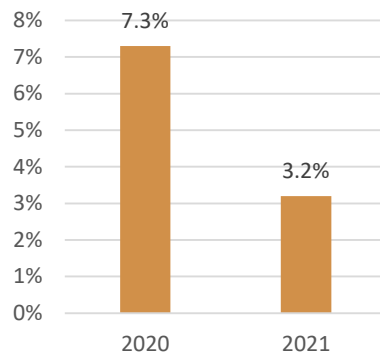


These areas include commercial nodes at the following intersections:

- Claremont and Prince
- Claremont and Tunnel
- College and Alcatraz
- Gilman and Curtis
- Hearst and Euclid
- Hopkins and El Dorado
- Hopkins and Monterey
- Martin Luther King Jr Way (MLK) and Dwight
- MLK and Hearst
- MLK and Rose
- MLK and Virginia

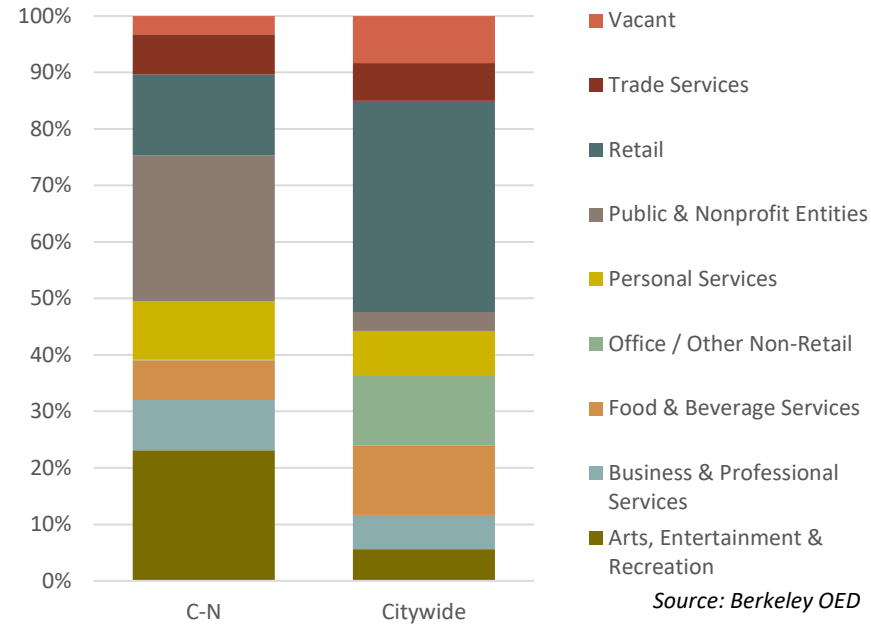
The first field data from the C-N areas was collected during the COVID-19 Pandemic of 2020 to track the impact of shelter-in-place orders on neighborhood-serving retail and service businesses.

**Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2021**



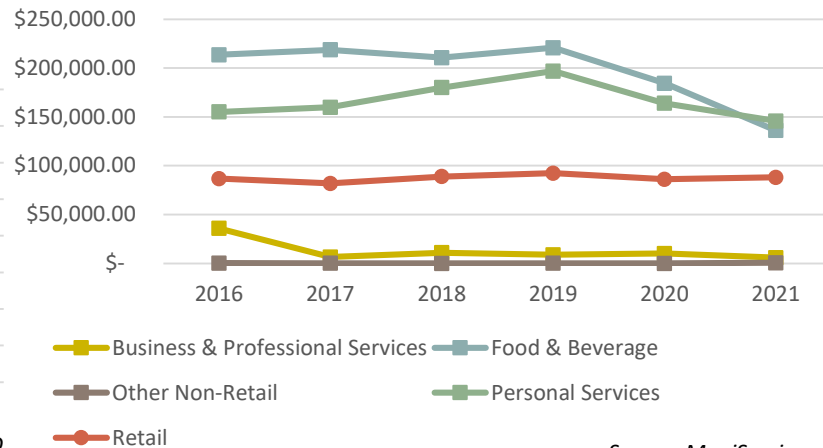
Source: Berkeley OED

**Business Mix (by Square Footage), 2021 Q3**



Source: Berkeley OED

**Sales Tax Revenue by Sector, 2016-2021**



Source: MuniServices