

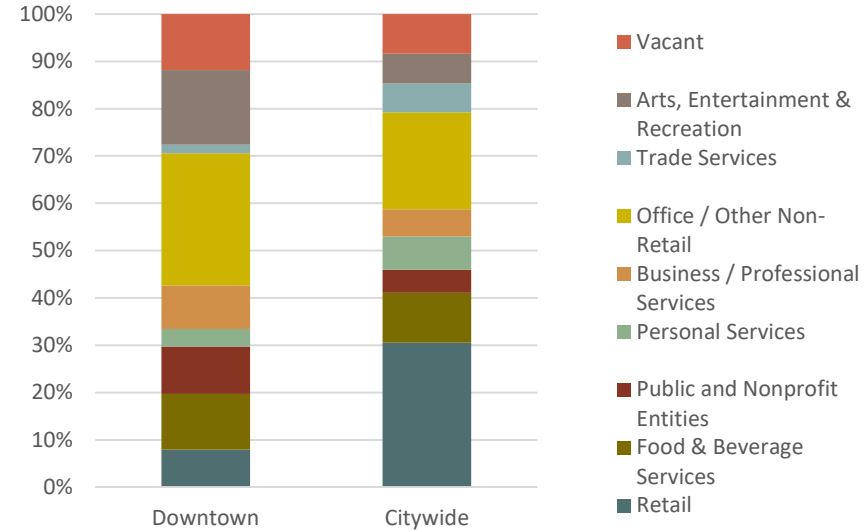
Downtown: 2022 Snapshot



Downtown Berkeley serves as the City's core commercial district, meeting the daily needs of residents, students, workers, and visitors. The district features from a significant number of arts and entertainment businesses which occupy 15.7% of total ground floor commercial space in the district compared to 6.3% citywide. As of Q3 2022, the vacancy rate in Downtown is 11.9%, down from 15.7% in 2021. Sales tax revenue generated by Food & Beverage services increased in 2022 to \$980,700 (a 66% increase from 2021). Sales tax revenue from other sectors has stayed consistent over the past five years.

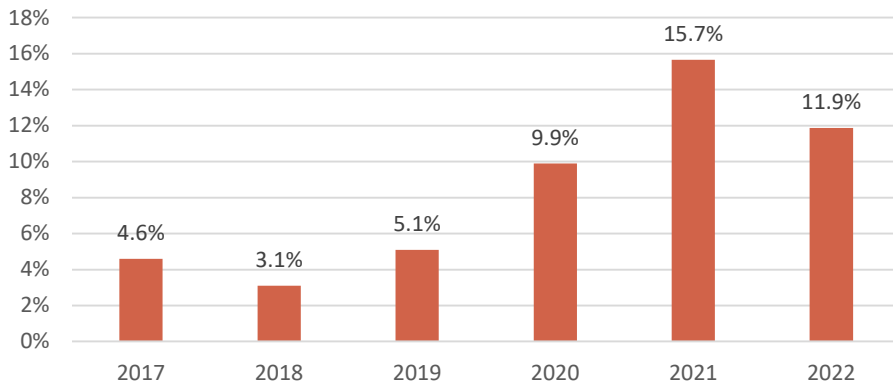


Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3



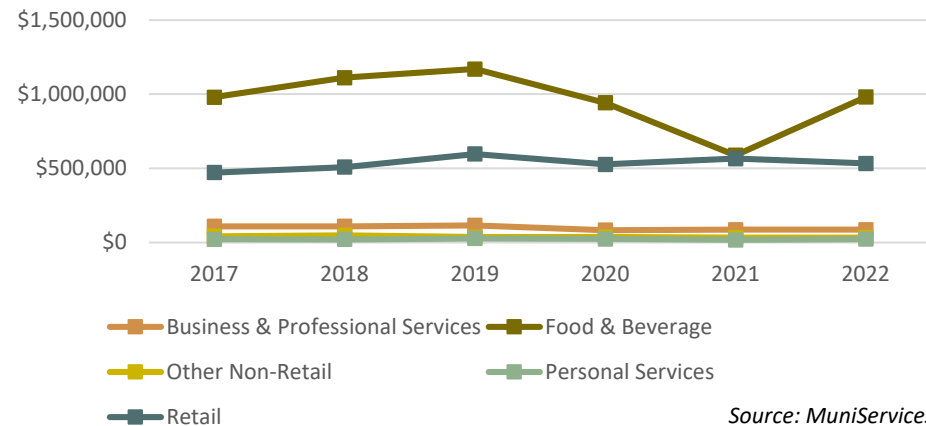
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



Source: Berkeley OED

Sales Tax Revenue by Sector, 2017-2022 (Q3, Q4, Q1, Q2 Annually)



Source: MuniServices

Elmwood: 2022 Snapshot

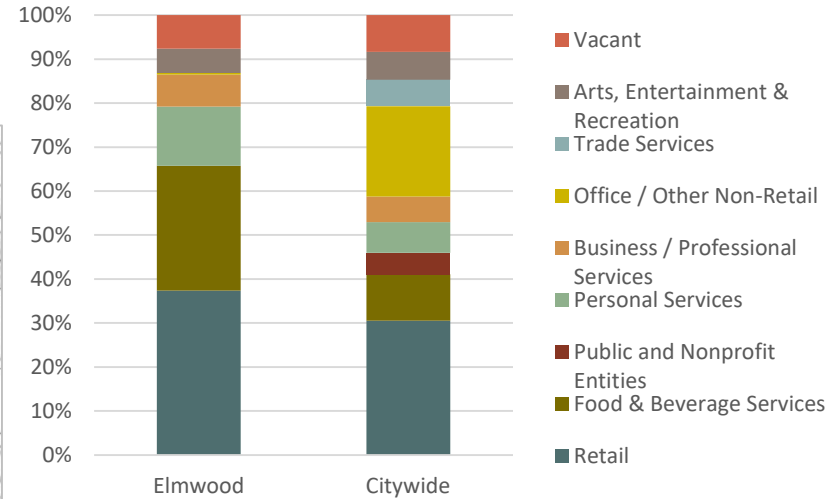


Elmwood is a compact, three-block commercial district along College Avenue near the Berkeley-Oakland border and the neighboring Rockridge shopping district. The Elmwood features many Food & Beverage businesses (28.4%) and Personal Services (13.4%), and is a walkable, neighborhood-serving commercial district. As of Q3 2022, the district's vacancy rate by square footage is 7.7%, which is a lower rate than 2021 (10.9%). Two large

commercial spaces that will soon be filled include the new 5 Tacos & Beers restaurant at 2914 College Avenue and the Catfenated Café at 2960 College Avenue. Sales tax collected from the Food & Beverage sector in the Elmwood increased 21% from last year, totaling \$170,738 in 2022. Similarly, sales tax revenue for Retail increased 37% since last year, totaling \$121,658 in 2022.

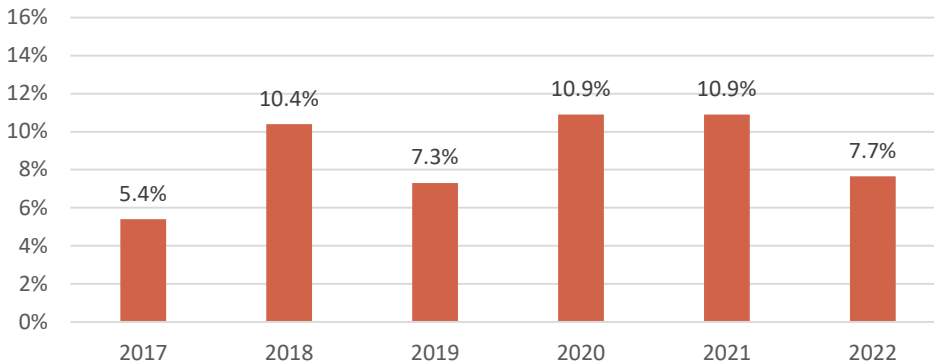


Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3



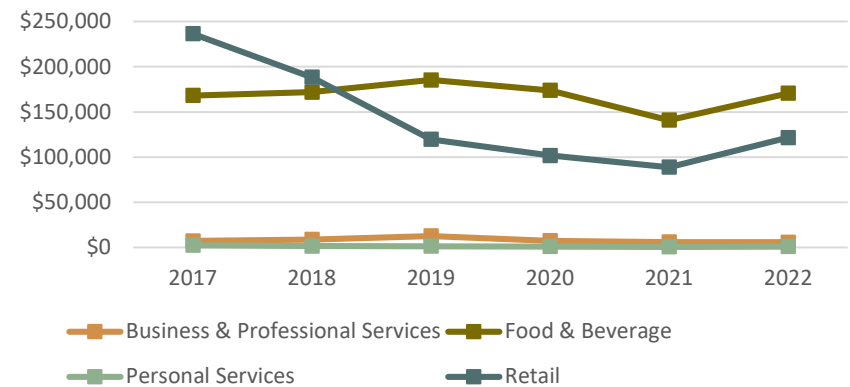
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



Source: Berkeley OED

Sales Tax Revenue by Sector, 2017-2022 (Q3, Q4, Q1, Q2 Annually)



Source: MuniServices

North Shattuck: 2022 Snapshot

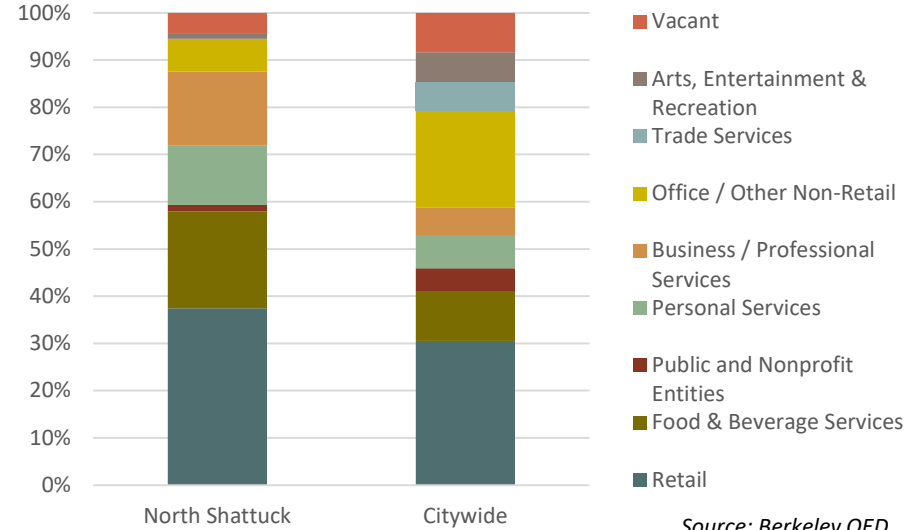


The North Shattuck district is characterized by a high concentration of well-known, long-standing, and celebrated restaurants. North Shattuck is both a walkable, neighborhood-serving commercial district as well as a global destination for food and dining. As of Q3 2022, the district's vacancy rate by square footage is 4.3%—the same rate as last year.

Sales tax collected from the Food & Beverage sector in North Shattuck increased by 42% in the last year, from \$298,196 in 2021 to \$424,038 in 2022. Sales tax revenue from Retail has declined slightly, which could partly be tied to the 2% drop in commercial retail space by square footage since 2021.

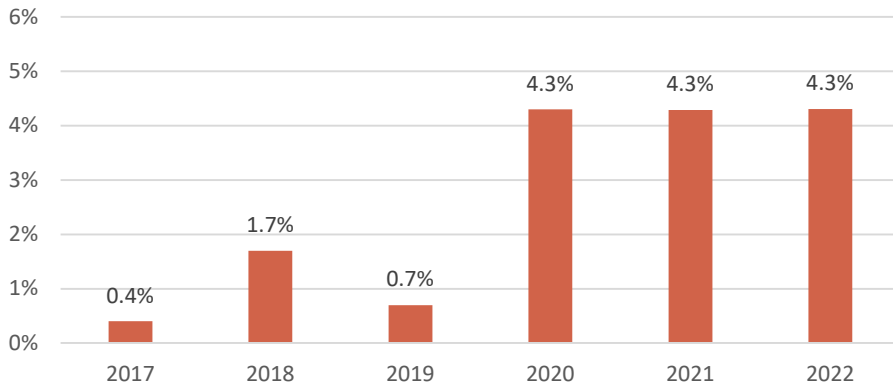


Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3



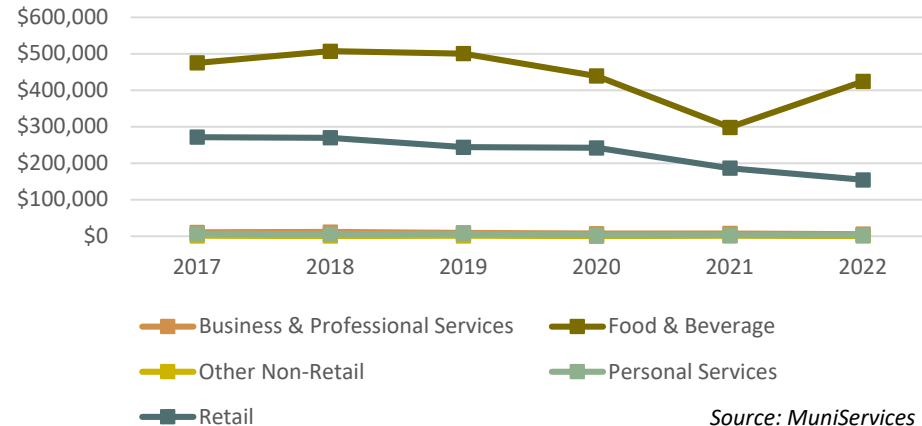
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



Source: Berkeley OED

Sales Tax Revenue by Sector, 2017-2022 (Q3, Q4, Q1, Q2 Annually)

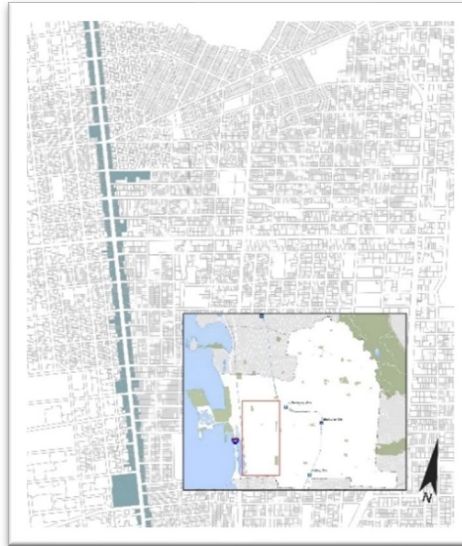


Source: MuniServices

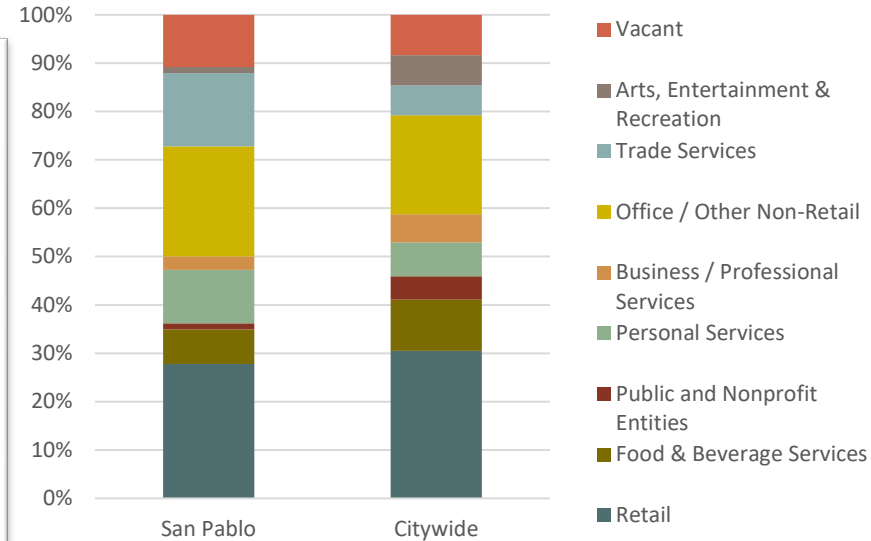
San Pablo: 2022 Snapshot



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 (15.1%)—including over 50 automobile services—and Office/Non-Retail space (22.8%). San Pablo functions as a regional destination for specific uses rather than a walkable, neighborhood-serving commercial district; as such, it features fewer Food & Beverage Services (7.1%) and Personal Services (11%). In Q3 2022, the district's vacancy rate was 10.8%—a significant increase from 7.9% in 2021 and among the highest in the City. Sales tax revenue has not changed significantly in the last year, although there was an increase of \$39,187 in the Business and Professional Services sector.

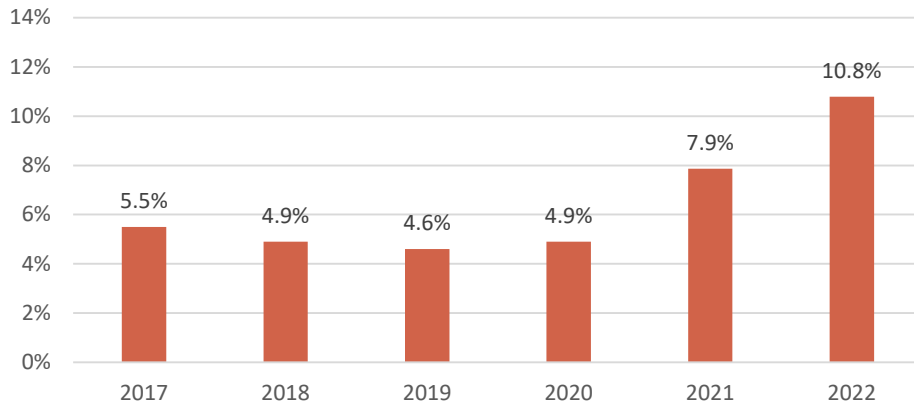


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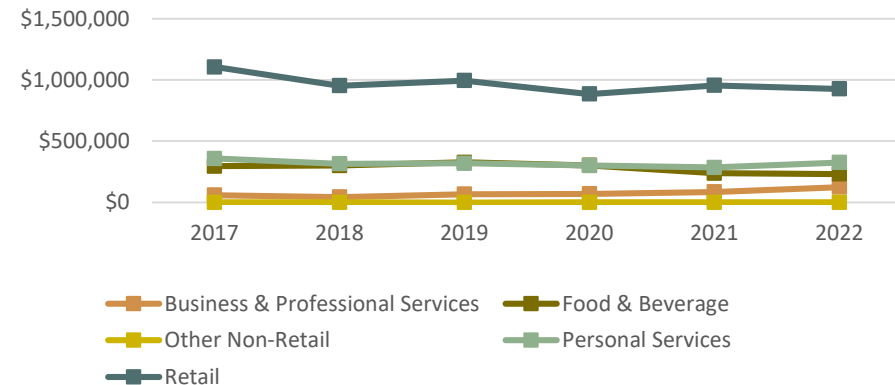
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



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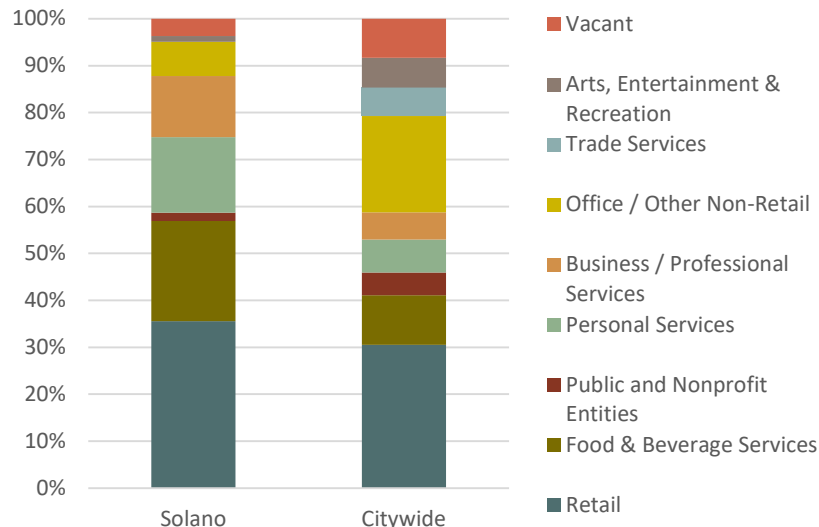
Solano: 2022 Snapshot



Solano is a small commercial district in North Berkeley, with a total of 147 commercial spaces and approximately 274,800 total square feet of commercial space. It shares a border with Albany and is situated next to an elementary school and an active neighborhood of single-family homes. Solano has a large key asset (the former Oaks Theatre) that is due to be occupied by a climbing gym. The district's vacancy rate by square footage is among the city's lowest, at 3.7%. Sales tax revenue has been recovering steadily since 2021, with the Food & Beverage sector's sales tax increasing by 16% over the last year, from \$216,349 in 2021 to \$250,160 in 2022.

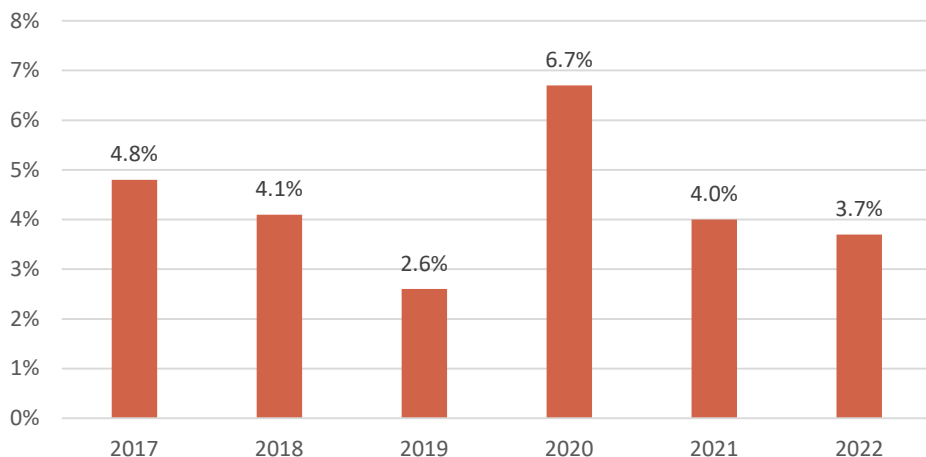


Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3



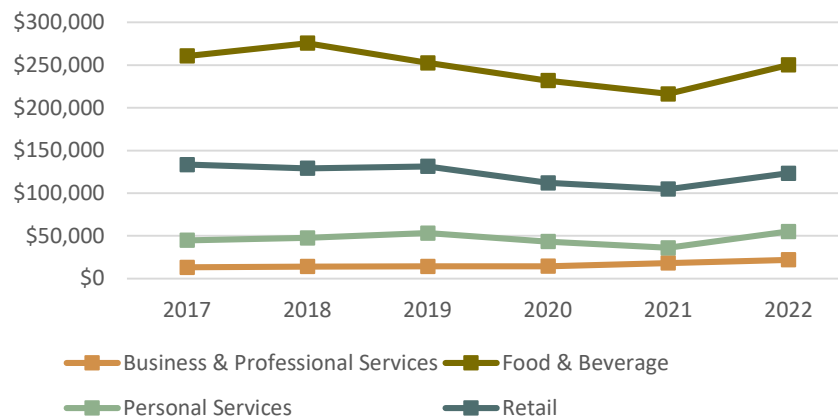
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



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Sales Tax Revenue by Sector, 2017-2022 (Q3, Q4, Q1, Q2 Annually)

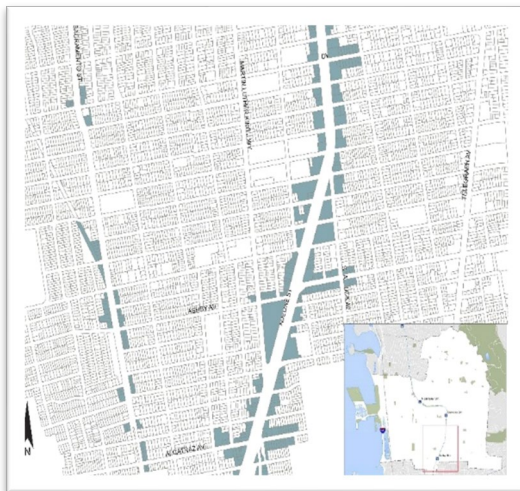


Source: MuniServices

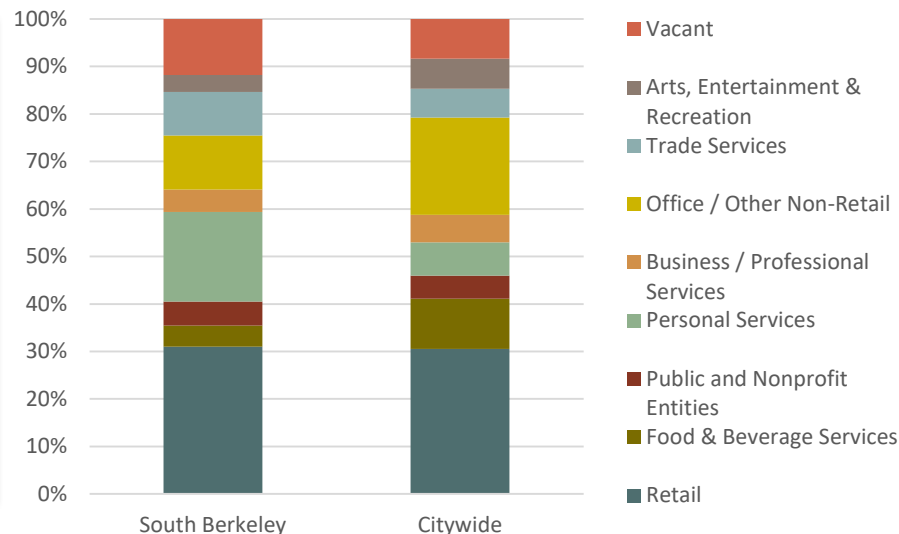
South Berkeley: 2022 Snapshot



South Berkeley is a large, diverse commercial district that 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 (18.8% vs. 7% citywide) but is under-served by Food & Beverage services, which account for only 4.4% of ground floor commercial space, as compared to 10.5% citywide. As of Q3 2022, the district's vacancy rate by square footage increased from 8.8% to 11.8%. Sales tax revenue has not changed significantly over the last year.

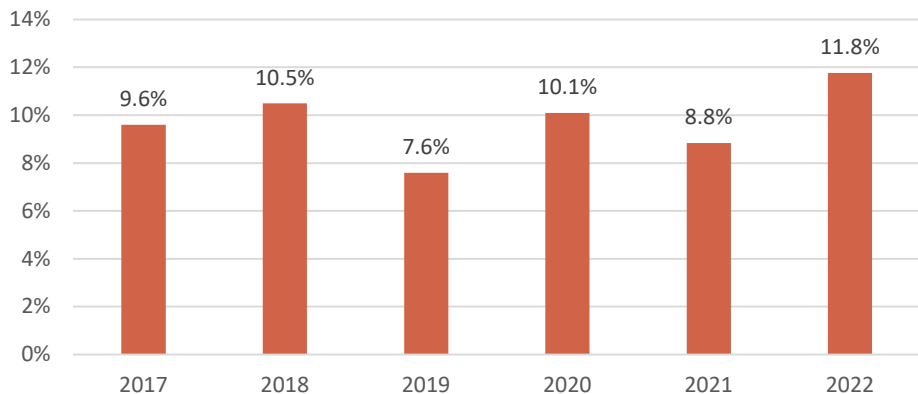


Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3



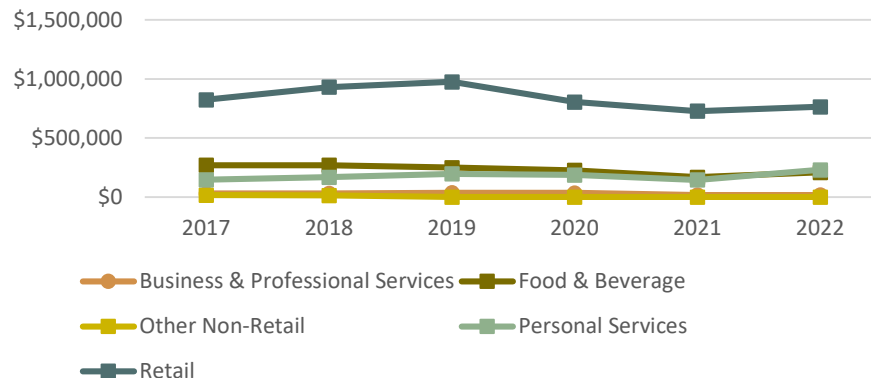
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



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Sales Tax Revenue by Sector, 2017-2022 (Q3, Q4, Q1, Q2 Annually)



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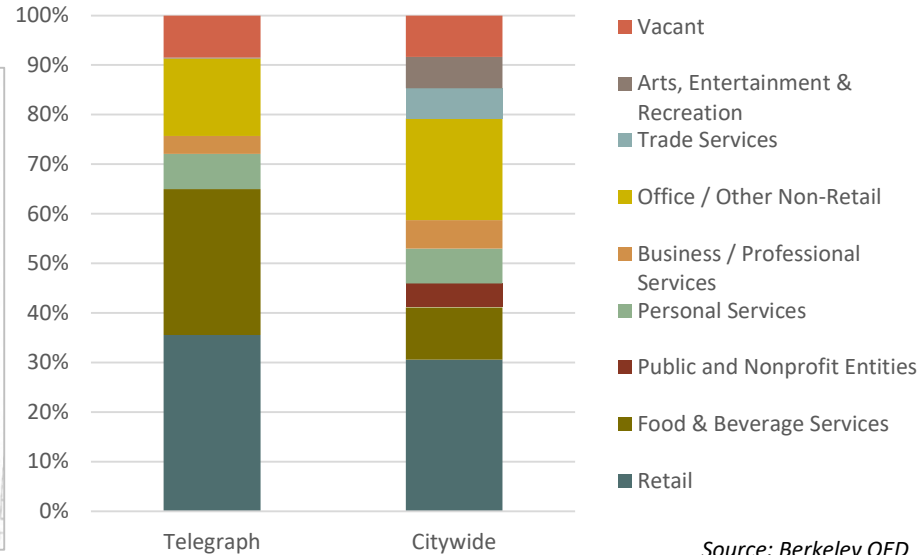
Telegraph: 2022 Snapshot



The Telegraph district is a bustling commercial district that stretches south of the UC Berkeley campus. It has a high concentration of Food & Beverage businesses, with 29.4% of ground floor commercial space occupied by restaurants and eateries in 2022, compared to 10.5% citywide. The district's vacancy rate continues to decline, dropping from 12.6% to 8.5% in the past year. This can be attributed partly to 8 new developments opening along Telegraph Avenue, including The Standard; a large housing complex on Bancroft Ave. Sales tax revenue from the Retail and Food & Beverage sectors on Telegraph have been increasing steadily and are back to 2020 levels; due in part to the full return of students on campus.

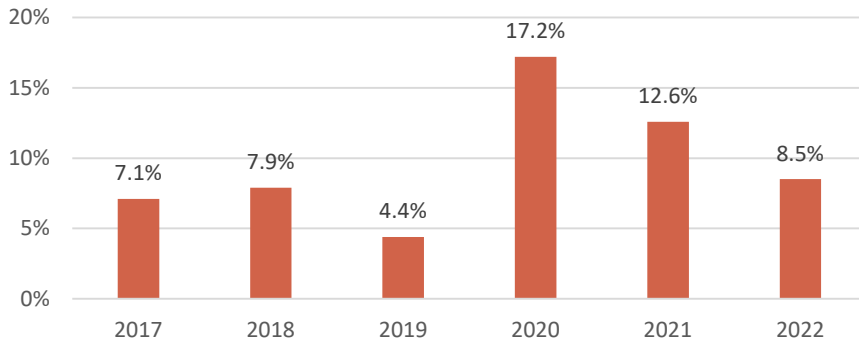


Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3



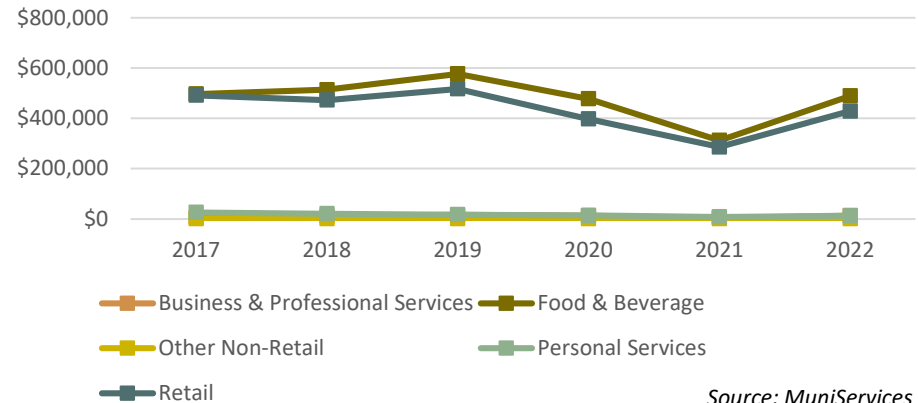
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



Source: Berkeley OED

Sales Tax Revenue by Sector, 2017-2022 (Q3, Q4, Q1, Q2 Annually)



Source: MuniServices

University Ave: 2022 Snapshot

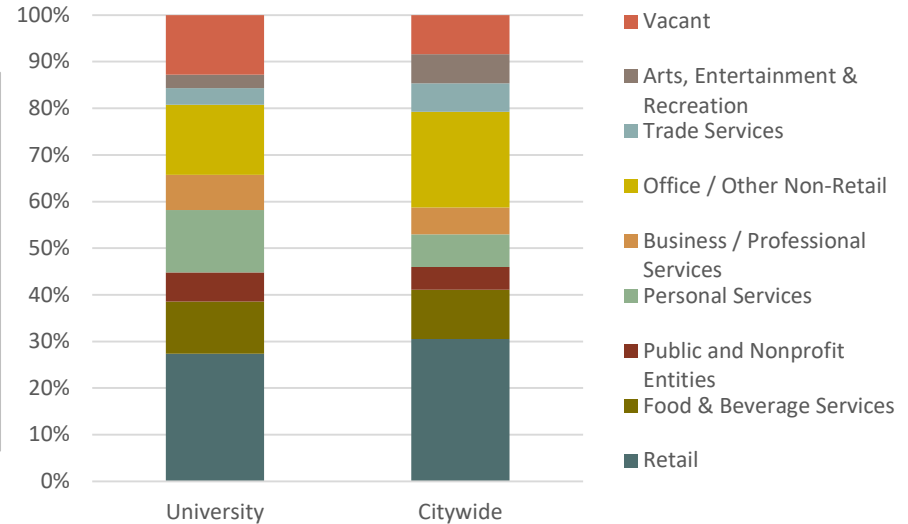


University Avenue, from Martin Luther King Jr Way to the waterfront, intersects many of the City's residential neighborhoods and serves as a gateway to the UC Berkeley campus. Since 2017, Retail and Food & Beverage Services have generated the most sales tax revenue in the district.

Food & Beverage sales tax revenue increased from \$729,387 in 2021 to \$1,045,950 in 2022. The ground floor vacancy rate has increased over the last year, jumping from 9.1% in 2021 to 12.8% in 2022.

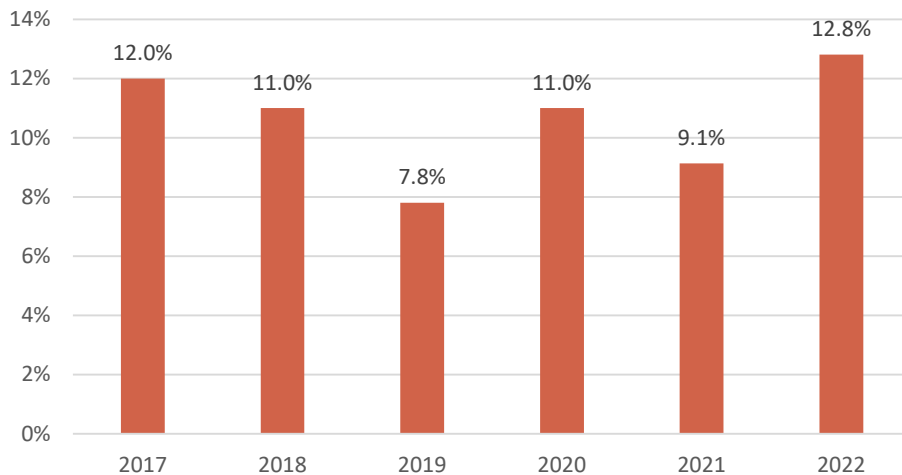


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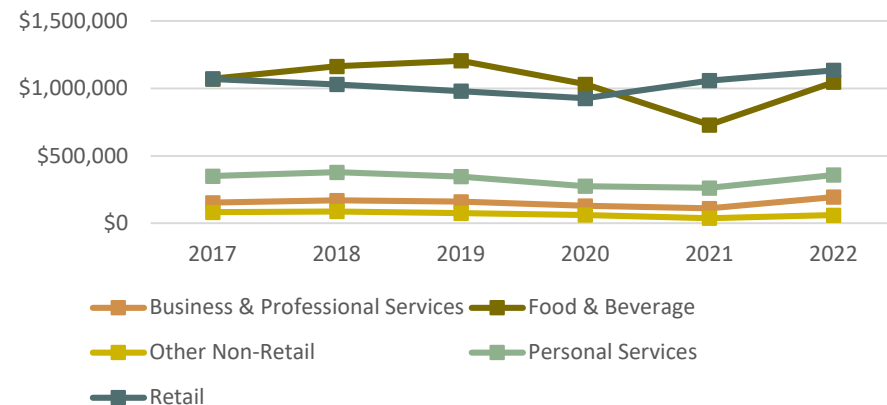
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



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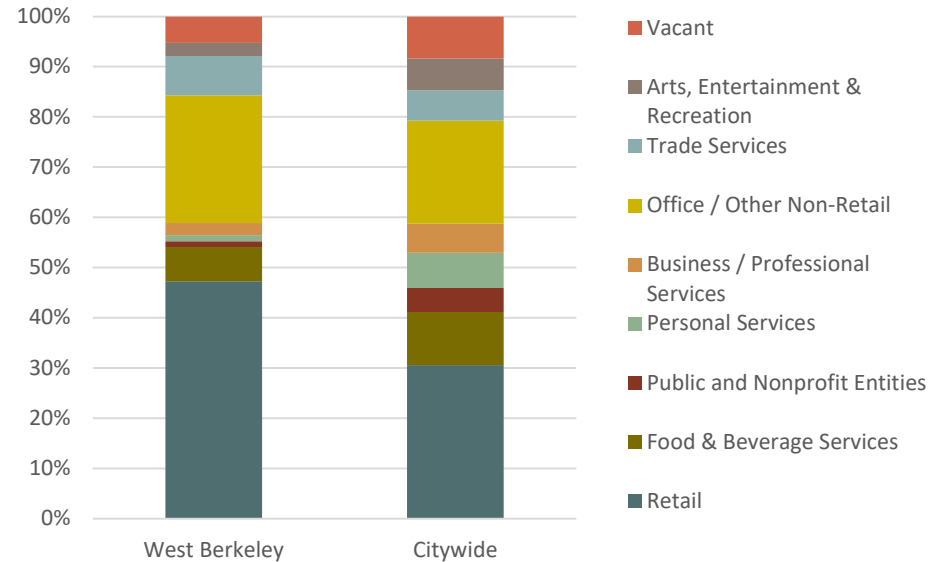
West Berkeley: 2022 Snapshot



West Berkeley represents all commercial spaces west of San Pablo Avenue, including 4th 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, compared to other districts. Retail accounts for 47.3% of ground floor commercial space. West Berkeley has a smaller percentage of square footage devoted to Food & Beverage (6.8%) businesses than the citywide rate of 10.5%. The commercial vacancy rate in Q3 of 2022 is 5.2%--a small increase from last year. Sales tax revenue has increased across all sectors in West Berkeley in the last year, with Retail seeing the largest increase (21%) compared to 2021 revenue. Retail accounts for the most sales tax revenue generated in the district.

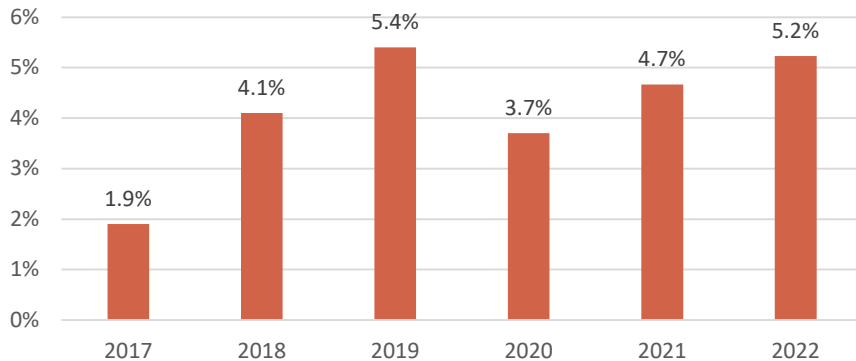


Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3



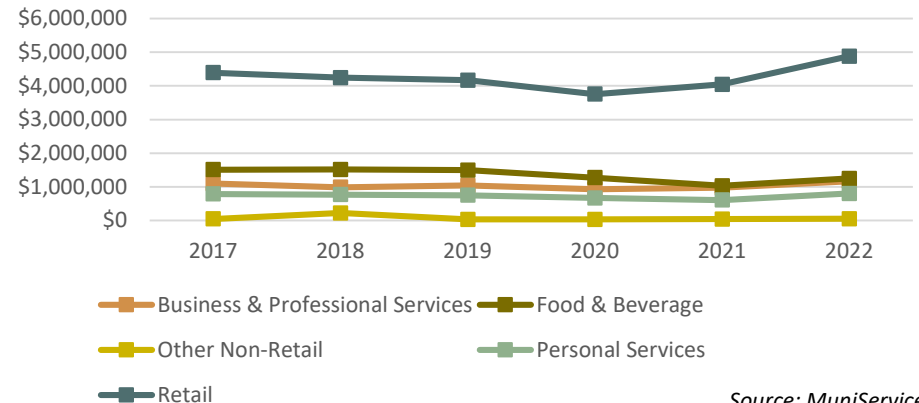
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2017-2022



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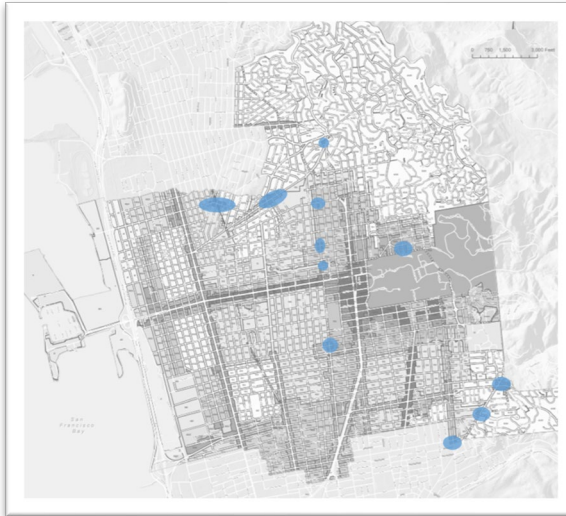


Source: MuniServices

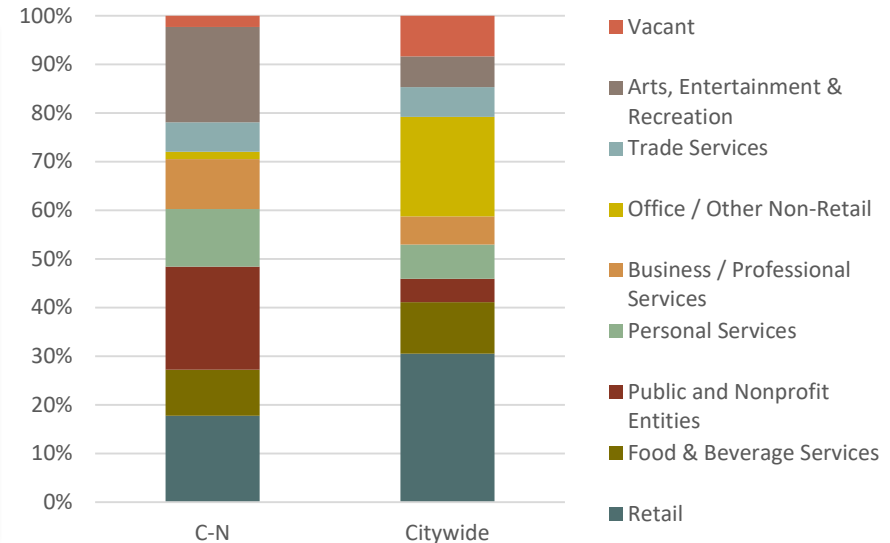
Neighborhood (C-N): 2022 Snapshot



Across Berkeley there are **11** smaller commercial pockets, zoned as “C-N” or “Neighborhood Commercial.” These areas are one or two block collections of commercial enterprises that are found throughout Berkeley (see map in blue). 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 2.6% of the city’s total sales tax. They also include a few large Arts, Entertainment & Recreation facilities (19.6% by square footage) and Public and Non-Profit entities (21.2% compared to 4.8% citywide).



Ground Floor Commercial Business Mix (by Square Footage), 2022 Q3

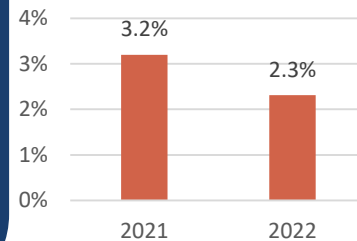


Source: Berkeley OED

C-N areas include commercial nodes at the following intersections:

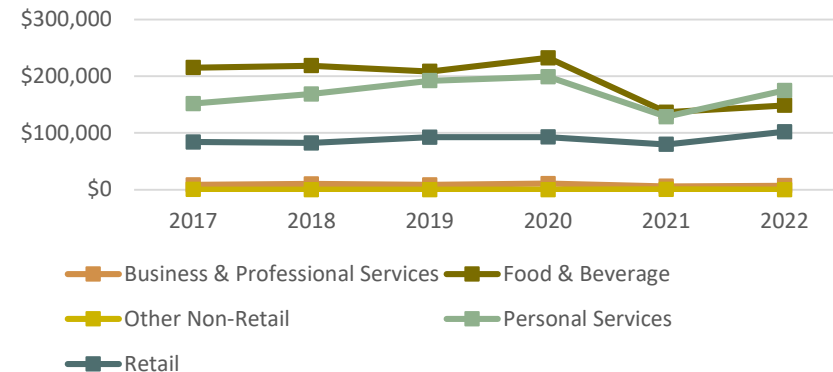
- Hopkins and Monterey
- Hearst and Euclid
- Martin Luther King Jr Way (MLK) and Dwight
- MLK and Hearst
- MLK and Rose
- MLK and Virginia
- Claremont and Prince
- Claremont and Tunnel
- College and Alcatraz
- Gilman and Curtis
- Hopkins and El Dorado

Ground Floor Commercial Vacancy Rate (by Square Footage), 2021-2022



Source: Berkeley OED

Sales Tax Revenue by Sector, 2017-2022 (Q3, Q4, Q1, Q2 Annually)



Source: MuniServices