





city of





KELEY

Economic Dashboard & COVID-19 Impacts & Response

December 2020 Office of Economic Development

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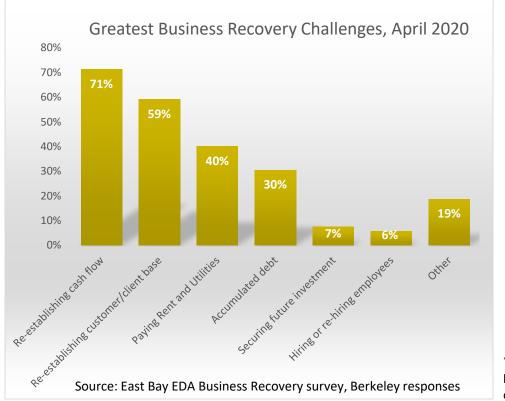


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COVID-19 BUSINESS IMPACT: preliminary impacts



In collaboration with the East Bay Economic Development Alliance, the City of Berkeley Office of Economic Development (OED) surveyed businesses by phone and email about the impact of COVID-19 in late April 2020. Most of the Berkeley respondents were *small* businesses: 97% had less than 10 employees; 40%+ were sole proprietors.* Respondents spanned industries including Professional and Technical Services (22%), Retail & Services (14%), Arts, Culture & Creative (12%), Healthcare (9%), Food & Beverage (8%) and Beauty/Personal Care (8%). 22% were Minority-Owned; 46% were Woman-Owned.



The pandemic took a steep toll

- More than two fifths of businesses surveyed expected greater than 80% revenue loss over the 3 months from when the pandemic began impacting our community.
- More than half (56%) expected to close permanently if they had to stay closed for 3-4 months.
- 37% "Shifted to online sales or virtual services" and 33% "Reduced salaries or staff hours" to avoid business closure.
- About two thirds applied for the Federal Paycheck Protection Program (PPP) forgivable loan.

*While Berkeley does have a business community comprised largely of small businesses (95% employ 100 or less), this survey sample skews toward a sample of smaller businesses than the Berkeley business community in general.

COVID-19 BUSINESS IMPACT: impacts by industry sector - employment



Sector (in Alameda County)	Employment	
Accommodation	-42.0%	
Arts, Entertainment & Recreation	-35.2%	
Personal & Laundry Services	-33.6%	
Clothing & Clothing Accessories Stores	-30.4%	
Building Equipment Contractors	-29.7%	
Employment Services	-26.5%	
Food Services & Drinking Places	-25.0%	
Durable Goods Manufacturing	-15.4%	
Educational services	-15.2%	

Source: Employment Development Department, 2020

Small businesses weren't the only ones affected

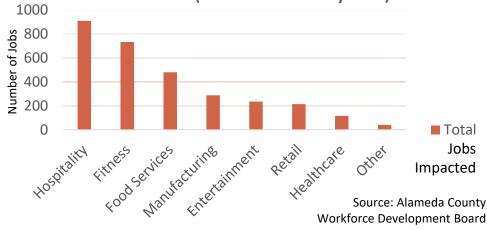
Among Berkeley's largest employers (those with 75 or more full-time employees), more than 3,000 layoffs (~4.6% of the Berkeley labor force) were reported through WARN notices* since the pandemic began.

*The Worker Adjustment Retraining Notification (WARN) protects employees, their families, and communities by requiring employers to give a 60-day notice to the affected employees and both state and local representatives prior to a plant closing or mass layoff. California WARN is applicable to a covered establishment with 75 or more employees full or part-time.

The impacts spanned industries

Alameda County's Dec. 2020 unemployment rate jumped to 7.6%, almost three times the rate a year prior (2.6%). Berkeley sectors most impacted included tourism & hospitality (especially lodging, food & beverage, and arts & cultural industries); retail (especially clothing & accessories); durable manufacturing; education and childcare providers; and personal & professional service industries (e.g. gyms and fitness studios, salons, employment services).

> Affected Workers - 2020 (Closures & Layoffs)



COVID-19 BUSINESS IMPACT: impacts by industry sector – hospitality



In 2020, Berkeley hospitality* industries suffered deeply from COVID-19 and related health orders.

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Tourism & Lodging



- 100% of meetings, conferences and events were cancelled indefinitely
- 90% of Berkeley hotel employees were laid off or furloughed from March – Oct. 2020
- ~75% of Berkeley hotel rooms were temporarily closed during that period
- Lodging tax revenues declined by 70% (a loss of \$4.7 million) year-over year from March – Nov. 2020

Food & Beverage Services

- Health orders banned indoor dining for more than three-quarters of 2020 forcing restaurants to earn revenues through delivery and takeout services, catering, outdoor dining (June-Nov. 2020) and new business models.
- More than 40 Berkeley restaurants and bars closed forever.
- The greatest number of closures were in Downtown Berkeley (17) and the Telegraph district (9), both near UC Berkeley's campus.

*Berkeley hospitality includes lodging, food & beverage establishments, event centers and planning, and more.

Many historic Berkeley institutions closed their doors permanently in 2020 including the Albatross Pub (est. 1964) and Au Coquelet Coffee Shop (est. 1976).





Photo credits: Twitter (top), Berkeleyside (lower), OED (left)

COVID-19 BUSINESS IMPACT: impacts by industry sector – arts & culture





Berkeley's arts and culture industry, which typically generates nearly \$165 million in annual economic activity and provides close to 7,000 local jobs, was hit especially hard by the pandemic. Based on Q2 2020 survey data collected by the City of Berkeley's Civic Arts Program from 65 Berkeley arts organizations, more than \$7.5 million of total revenue was lost for April - June and 288 employee positions were eliminated in the same quarter.

170,800 92% ATTENDANCE/VISITORS LOSS FOR THE QUARTER





\$595,174*

Total amount spent on COVID-19 related expenses

- Cleaning Supplies, masks, handsanitizers, cleaning serivces
- New IT software to enlarge digitual presence
- Technology equiprment for working at home



*Numbers based on Q2 2020 survey data - see full survey results <u>here</u>. Updated numbers will be posted on the City of Berkeley's <u>Civic Arts webpage</u>.

COVID-19 BUSINESS IMPACT: impacts by industry sector – innovation sector



Industry

Software

Biotech

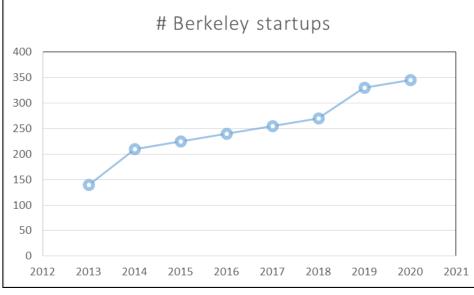
Hardware

CleanTech

Healthcare

Other

Nearly 400 Berkeley-based "innovation sector" companies (including tech, biotech, Research & Development [R&D] and other STEM industries) had employees either working from home or in other *essential* medical, life science or health manufacturing facilities.



Source: OED, UC Berkeley IPIRA

In 2020 Berkeley startups* raised more than \$700 million through venture, angel-backed financing and convertible securities.

*Startup = For-profit businesses that sell innovative technology products or services OR substantively use innovative technologies to develop and manufacture their products or provide their services AND are developing repeatable and scalable business models that aren't yet profitable. More than a third **Innovation Companies** of Berkeley by Category innovation companies are in the biotech & healthcare sectors, 12% industries that witnessed tremendous 28% global investment Source: OED in 2020.

Other 2020 Highlights

- 2 Nobel prize winners at UC Berkeley: Jennifer Doudna (Chemistry) and Reinhard Genzel (Physics)
- 2 Berkeley companies were listed in TIME Magazine's <u>100 Best Inventions of 2020</u>: Perfect Day Foods & Pivot Bio
- 10 Berkeley companies received nearly \$6 million in federal SBIR & STTR[†] grants for Research & Development (R&D)

[†] Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) programs are highly competitive programs that encourage US small businesses to engage in Federal Research and Development with the potential for commercialization.

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COVID-19 BUSINESS IMPACT: impacts by industry sector – office based businesses



In Q4 2020, OED conducted a survey of Berkeley office-based businesses to better understand how their commercial real estate needs changed in light of the COVID-19 pandemic. Of 80 respondents, the vast majority (82%) occupied small offices (< 5000 sf). The majority were either in professional

(82%) occupied small offices (< 5000 sf). The majority were either in professional services (43%) or technology (24%) industries in Downtown Berkeley (zip code 94704)

or West Berkeley (zip 94710). 58% rate having a private office as "extremely important" and almost two thirds were still renting their Berkeley office despite SIP restrictions. 37% have a long term lease that won't expire until 2023 or after.

Despite many firms being firmly rooted in Berkeley, expect changes ahead

Photo credit: AAA

Nearly 50% have leases that will expire before the end of 2021. More than a quarter aren't

sure yet what they will do when their lease expires; 8% do not plan to have an office in Berkeley after their lease expires.

When your lease is up, do you expect to:		
	%	Count
Renew your lease	34.2%	26
Renew, but only if you can negotiate a lower rate or different terms	7.9%	6
Find a new smaller space	9.2%	7
Find a similarly sized space in a different Berkeley location (or neighboring city)	2.6%	2
Find a similarly sized space in another city/ region	2.6%	2
We will not seek another office once this lease terminates	5.3%	4
Not sure yet	27.6%	21
Other	10.5%	8

Help is possible for those who ask

- 46% of office survey
 respondents haven't
 requested any changes to
 their rental or mortgage
 costs
- 18% have been able to negotiate lower rental fees because of the pandemic's business impact

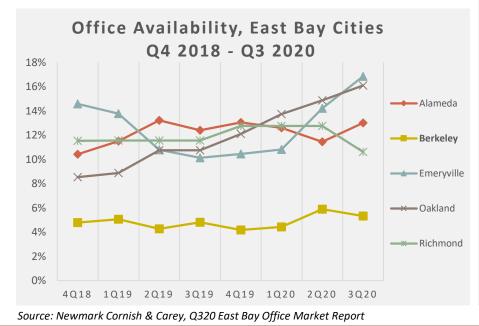
Source: OED Survey of Berkeley Office-Based Businesses, Q4 2020

COMMERCIAL ACTIVITY: office trends & transactions



Q3 2020 Office Market, Berkeley	Indicators
Total Inventory	3,455,150 SF
Under Construction	0 SF
Availability Rate	5.33%
Qtr Gross Absorption	115,960
Qtr Net Absorption	-52,916
YTD Net Absorption	-114,282
Average Asking Rent	\$3.53 / SF

Source: Newmark Cornish & Carey, 3Q20 East Bay Office Market Report



Office-Based Businesses Work Remotely

Office-based businesses were closed for the majority of 2020 due to COVID-19 health orders. However, in OED's Q4 2020 survey of officebased businesses, **63% indicated that they were easily able to operate with employees working remotely** and, of those that found remote working difficult, 23% "found silver linings".

Q: From the perspective of business productivity, how easy has the transition been for your business to operate with employees working remotely?

	%
Extremely easy – we're doing great!	19.0%
Easy, though there were some challenges and adjustments required.	44.3%
Hard, though we have found some silver linings.	22.8%
Extremely hard – we're not sure how much longer we can continue like this.	3.8%
Impossible – without an office, we can't work.	3.8%
Other	6.3%

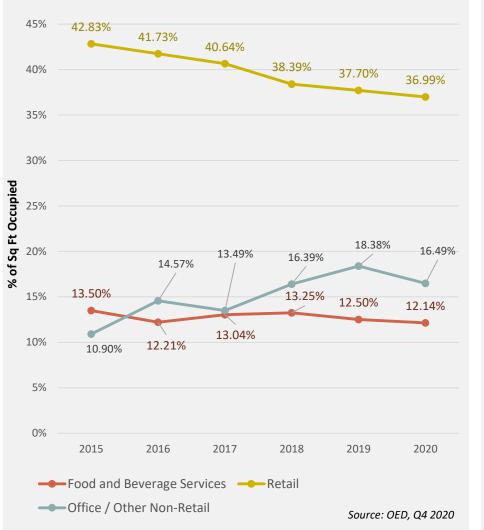
Source: OED Survey of Berkeley Office-Based Businesses, Q4 2020

COMMERCIAL ACTIVITY:

commercial trends & transactions



Citywide Commercial Inventory, Select Categories, By Square Footage, 2015-2020



New Development

Wareham Development started leasing 16,297 square feet of laboratory and office space at 999 Anthony St in West Berkeley.

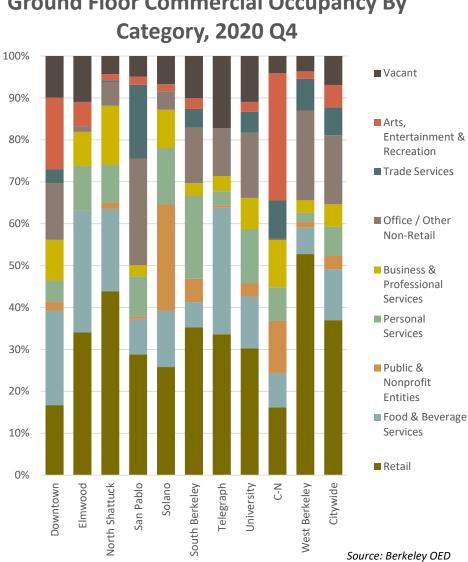


Construction on Kaiser Permanente's new 61,000-squarefoot medical offices at 2621 10th St. (San Pablo Avenue/ Parker St) put the ball in motion for a 2021 opening.



COMMERCIAL ACTIVITY: commercial districts & vacancy rates





Ground Floor Commercial Occupancy By

Citywide, the ground floor commercial vacancy rate has increased to 6.9%*, an increase of 1.5% since Q3 2019. The Telegraph, Downtown, and Solano districts have experienced the largest increases in their vacancy rates since the COVID-19 pandemic began.

Vacancy Rates by District, Calculated by Square Footage, 2015-2020

L	District	2015	2016	2017	2018	2019	2020
	Downtown	8.4%	4.7%	4.6%	3.1%	5.1%	9.9%
	Elmwood	2.0%	1.5%	5.4%	7.3%	7.3%	10.9%
	North Shattuck	2.1%	2.6%	0.4%	1.7%	0.7%	4.3%
	San Pablo	7.3%	5.9%	5.5%	4.9%	4.6%	4.8%
	Solano	3.5%	7.5%	4.8%	4.1%	2.6%	6.7%
	South Berkeley	7.9%	8.2%	9.6%	9.7%	7.6%	10.1%
	Telegraph	7.1%	5.1%	7.1%	7.9%	4.4%	17.2%
	University	9.4%	14.2%	12.0%	11.0%	7.8%	11.0%
9	Neighborhood Commercial (C-N)						7.3%
	West Berkeley	3.3%	8.8%	1.9%	3.7%	5.8%	3.7%
	Citywide Avg.	5.9%	6.5%	4.6%	5.0%	5.4%	6.9%

*Typical commercial district storefront vacancy rates range from 4-8% due to natural market churn.

Source: Berkeley OED

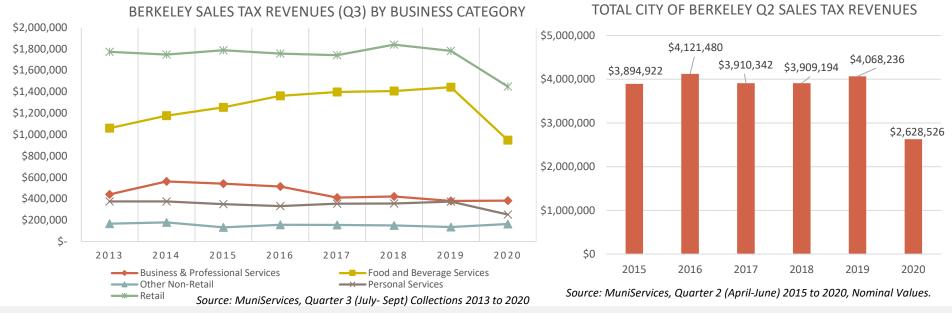
COMMERCIAL ACTIVITY:

sales tax revenues – the pandemic hits



Total Annual Sales Tax Revenue - Past 4 Quarters	Q4 2018- Q3 2019	Q4 2019- Q3 2020	Change
City of Berkeley	\$18,839,486	\$16,355,379	-13.2%*
Alameda County (total including cities)	\$356,111,846	\$328,424,125	-7.8%
State of California	\$7,363,034,598	\$7,050,811,392	-4.2%

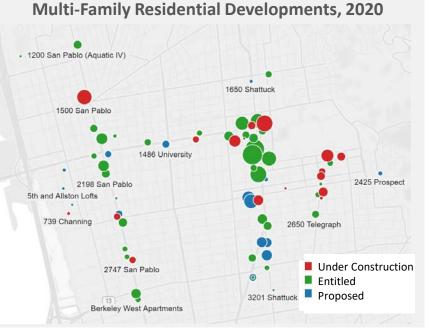
*While increases in Food & Beverage sales helped to make up for decreases in Retail sales tax in past years, due to the COVID-19 Pandemic, both Retail and Food & Beverage sales declined in 2020.



In Q3 2020, the *Retail* subsector was the largest contributor to the city's sales tax revenue (45.3%), with *Food & Beverage* second (29.7%). Health Order restrictions impacting these sectors account for the significantly higher decline in sales tax collections in *Q2* 2020 (-35% vs Q2 2019) than in *Q3* 2020 (-22.3% vs Q3 2019). The decline in Q3 sales tax collection was largely due to significant decreases in the *Food and Beverage* sector (-34.3% vs Q3 2019) , *Personal Services* sector, *i.e. Automotive Repair* and *Salons* (-32.4%), and *Retail* (-18.7%). There were, however, some increases: *Other Non-Retail* collections (including health and government services) ticked up by \$28,166 (20.5%).

DEVELOPMENT & HOUSING: construction & pipeline





Data Source: City of Berkeley Planning Department Pipeline Report (May 2020); Map: <u>Red Oak Realty</u> (September 2020).

Housing Development Pipeline

As of mid-2020, 72 distinct housing developments were proposed, entitled for development, or under construction. The buildings currently under construction will contain 1,351 net new units, a small increase from the number of units under construction in 2019 (1,141). Overall, in the last two years, Berkeley has seen increasing numbers in the development pipeline: 1,790 dwelling units received entitlements in 2020, up from 1,573 in 2019.

Pipeline Project Highlights

2650 Telegraph is a 5-story, 45-unit project on Telegraph Avenue at Derby Street. The project was approved by the Berkeley Zoning Adjustments Board (ZAB) in March 2020 and by City Council in June 2020. It will have 50 bike parking spaces and over 4,000 sq. feet of usable open green space.

3000 San Pablo is a 6-story, 78dwelling unit project approved for the busy corner of Ashby and San Pablo Avenues. 1,248 sq. feet of commercial space for one tenant is planned for the ground floor at the northeast corner of the property.

Image above and right: Trachtenberg

Architects





Image: Mill Creek Residential

Modera Achenson Commons is currently under construction. The 205 unit building will boast 14,000 sq. feet of retail space. The building is next to the UC Berkeley campus and in the heart of Downtown at the intersection of Shattuck and University Avenues. It is due to open in the middle of 2021.

DEVELOPMENT & HOUSING: housing costs





Sources: MLS, Redfin, and City of Berkeley Rent Stabilization Board

Median Sale Price, Single-Family Homes, Dec 2020			
Alameda	\$1,073,750		
Albany	\$784,000		
Berkeley	\$1,320,000		
El Cerrito	\$1,051,028		
El Sobrante	\$660,000		
Emeryville	\$635,000		
Oakland	\$855,000		
Richmond	\$550,000		
Piedmont	\$2,470,000		
San Leandro	\$770,000		

Sources: Redfin (top), CalMatters.org, RentCafe.com (bottom)

Home sales prices remain high but rents drop

Berkeley's single family home values increased 14.8% from Nov. 2019 to Nov. 2020, with a 4.1% increase in sales volume over the same period. 76 single family homes were sold in Berkeley in Nov. 2020 alone and 79% sold above list price. Since stay-at-home orders began in March 2020, the median price of single family homes in California (\$700,000) hit an all time high in August. Meanwhile, median rents in larger cities have dropped: San Francisco's median rent decreased 25% since Q1 2020 and Berkeley's market rate rents for multi-bed units decreased by 3% year over year to \$3,099.



COVID-19 CRISIS RESPONSE & RECOVERY



Everyone must cover their nose and mouth with a mask, bandana, or other cloth barrier.

CITYOFBERKELEY.INFO/COVID-19

VENDORS



BUSINESS & ARTS SUPPORT: small business revolving loan fund & resiliency loan program



The City of Berkeley's Revolving Loan Fund (RLF) is federally funded by the Economic Development Administration (EDA) and provides access to capital for businesses that don't qualify for traditional commercial loans. All current RLF recipients were offered a six month pause in monthly payments due to the pandemic.

Portfolio Summary 2020	Total Loans	Active Loans
Number of RLF Loans	44	8
RLF \$ Loaned	\$2,693,417	\$760,000
Total Non-RLF \$ Leveraged	\$7,870,426	\$2,364,010
Private Sector Jobs Created	218.5	51
Private Sector Jobs Saved	102.5	77
Total Minority Jobs Created and Saved	124	
Total Women Jobs Created and Saved	133	
Totals Jobs Created/Saved		267
	ey OED, June 2020	



Supporting Berkeley's existing small businesses

Berkeley's small businesses are key to the economic health of the City of Berkeley. Recognizing the enormous negative impact of COVID-19 on businesses' finances, OED applied for a CARES Act grant to provide additional funding to existing businesses. The City was awarded the grant and launched the **COVID-19 Resiliency Loan Program (RLP)** for Berkeley businesses that are at least two years old and with 50 employees or less. This program streamlines the approval of 0%-1% interest loans for businesses in need of working capital with a six month non-payment and non-accrual period to provide additional assistance and flexibility for entrepreneurs.



Photos: RLF recipients pivot to new

COVID-safe practices -- an outdoor handwashing station at Nabolom Bakery (above) and online cooking classes at Kitchen on Fire (right).



The Loan Administration Board (LAB) and City Council acted swiftly to modify the existing Revolving Loan Fund (RLF) Administrative Plan to incorporate the RLP. In addition, the LAB worked with staff and partner organizations to conduct targeted outreach to the hardesthit businesses, including many that didn't receive previous grant funding from the Berkeley Relief Fund.

BUSINESS & ARTS SUPPORT: Business & Arts Relief Grants



Continuity Grant Awards

In April of 2020, the City awarded grants to businesses and arts organizations whose revenues were significantly impacted by the COVID-19 pandemic. The Business and Arts **Organization Continuity Grant** Programs were funded through a \$3M allocation of the City's catastrophic reserve fund on March 17, 2020 to provide assistance to renters, small businesses and arts organizations significantly impacted by the COVID-19 pandemic and state of emergency. Of that funding, \$1 million was allocated to expand the Housing Assistance Program, which provides assistance to low-income renters; \$1 million was allocated to create the Business Continuity Grant Program; and \$1 million was allocated to create the Arts Organization Continuity Grant Program. In addition, community leaders launched the Berkeley Relief Fund, a campaign to raise private donations to match the City's contribution.

COVID-19 Small Business & Arts Organization Emergency Grant Program Impact



BUSINESS & ARTS SUPPORT: COVID-19 Emergency Operations Center Response



New avenues for City-Business communications

Throughout the pandemic, OED found a number of ways to communicate with - and hear from - businesses citywide:

- Established an Emergency Business Outreach Team (April 2020) which conducted ~5000 business surveys and ~800 phone calls to assess preliminary COVID-19 impacts
- Fielded thousands of direct business inquires by phone & email
- Hosted 40+ recovery listening sessions for key industry sectors and arts organizations
- Issued 24 OED newsletters (viewed 33,000+ times) with relevant information and opportunities for businesses
- Partnered with the Berkeley Chamber to organize 13 digital Berkeley ٠ Business Forums for the business community at large to gain information, ask questions and share resources
- Conducted field surveys in Berkeley's commercial districts to document business closures, pivots and vacancies
- Published COVID-19 resources for businesses & arts organizations on the City of Berkeley + Berkeley Chamber websites

Protecting Public Health – Through Our Business

Image

Credits: Citv

of Berkeley



Berkeley businesses quickly implemented site specific protection plans to keep customers and employees safe, and worked tirelessly to educate customers and employees on the importance of masking and physical distancing to contain airborne disease

transmission. **Everyone must wear** a face covering...

To prevent COVID-19 spread, covering your nose and mouth is now mandatory. You can use a cloth mask, bandana, or scarf



...and stay 6 feet apart

We are required to refuse service to anyone who does not comply.

CITYOFBERKELEY.INFO/COVID-19

What we did, why we did i



BUSINESS & ARTS SUPPORT: Outdoor Commerce



Berkeley's business community pivoted quickly to offer innovative "to-go" service models and embraced outdoor dining and commerce during the pandemic.



Outdoor Commerce

Berkeley's City Council authorized an urgency ordinance in June 2020 to permit outdoor dining and commerce.

Over 50 installations of both public and private outdoor commerce were established in Berkeley in 2020.



Technical Assistance for Businesses

OED coordinated a webpage and a guide to assist businesses with outdoor commerce installations and worked with local architects and designers to provide design templates and pro-bono assistance.



Which permit is right for my business?



SIDEWALK SEATING (PAGE 3)

For applicants wishing to serve food and/or alcohol or increase their outdoor dining capacity a sidewalk seating application is likely the most appropriate.

- For applicants conducting personal service businesses outdoors (i.e. hair and nail salons) with reservations and personal protective equipment (PPE) in place.
- Sidewalk seating or sidewalk area for personal service is controlled by the permittee and may be used for patrons with reservations.



naintain the space

- For applicants that want to provide extra outdoor space for queuing, or "to-go" food
- consumption, or fitness classes construction of a parklet may be a better fit. Parklets are considered public space. The parklet sponsor(s) is/are required to

City of Berkeley



Street Bar

Clockwise: 'Outfront' at the UC

Theater, online orders at Café

Buenos Aires, pick up food at

Imm Thai Restaurant, and

curbside service at Picante.

BUSINESS & ARTS SUPPORT: #DiscoveredinBerkeley business marketing campaign



The Discovered in Berkeley marketing campaign highlighted local businesses with notable pandemic "pivots" and entrepreneurs demonstrating perseverance and creativity. Women-owned businesses, black-owned businesses, childcare providers, healthy food manufacturers, artists and curators were a few of the industries featured. Berkeley childcare providers find solutions, enable human interaction in time

RECENT STORIES

of isolation By Local sponsor, Aug. 25, 2020

resilience

Throughout 2020:

- More than 2,700 users visited DiscoveredinBerkeley.com
- 1000+ uses of #DiscoveredinBerkeley were found on Instagram
- 9 Berkeleyside articles generated 24,000+ page views and 1000+ outbound clicks to Berkeley businesses' websites
- 27 Berkeleyside banner ads generated 1.1 million+ impressions and nearly 1,500 "clicks"



Discover how Berkeley childcare providers are finding solutions and enabling human interaction in time of isolation.







DISCOVERED BERKELE



holidays-and enable economic recovery -with gifts from Fourth Street Fine Art.

Support local businesses this holiday season >



Learn more about Berkeley' innovative businesses

challenges of 2020.

A host of Berkeley makers and

bakers are nourishing locals and

building community, despite the

BERKELE



Local childcare providers have risen to the challenge of looking after their charges during

The stories of three Black enterprises demonstrate Berkeley's economic diversity and

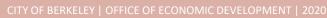
LOCAI CRIMCATE PROVIDERS nave risen to the chanenge or looking after their charges of the pandemic. They have even found silver linings amid the heightened restrictions.

Black-owned businesses in Berkeley demonstrate the city's economic

Discover Black-owned businesses in Berkeley, like Lola's African Apparel, which employs Nigerian tailors and seamstresses to make contemporary and traditional styles.



Learn more about childcare providers across Berkelev



BUSINESS & ARTS SUPPORT: #BerkeleyHolidays Gift Guide and marketing campaign



A partnership between OED, the Berkeley Chamber, Visit Berkeley and business districts citywide, the #BerkeleyHolidays Gift Guide and marketing campaign promoted safe local shopping during the holiday season.

- **155 Berkeley businesses** were featured, including 86 Woman-owned and 36 Minority-owned businesses.
- BerkeleyHolidays.com received 12,000 page views generating nearly 4,000 clicks to merchant sites.
- The social media campaign generated
 ~1,300 unique #BerkeleyHolidays posts on Instagram – & more on Facebook.
- Advertising on social media (Facebook & Instagram) and in local publications (*The Daily Cal* & *Berkeleyside*) generated
 450,000+ impressions
- 3,800 unique viewers saw the Discovered in Berkeley articles featuring select Gift Guide businesses in *Berkeleyside*
- 97% of businesses surveyed would participate in the campaign again*

*Based on Jan. 2021 Berkeley Chamber survey results from 32 participating businesses







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Office of Economic Development (OED)

See the OED website for past Economic Dashboards and other economic reports:

https://www.cityofberkeley.info/oed/reports/

Contact OED for more information: oedmailbox@cityofberkeley.info