

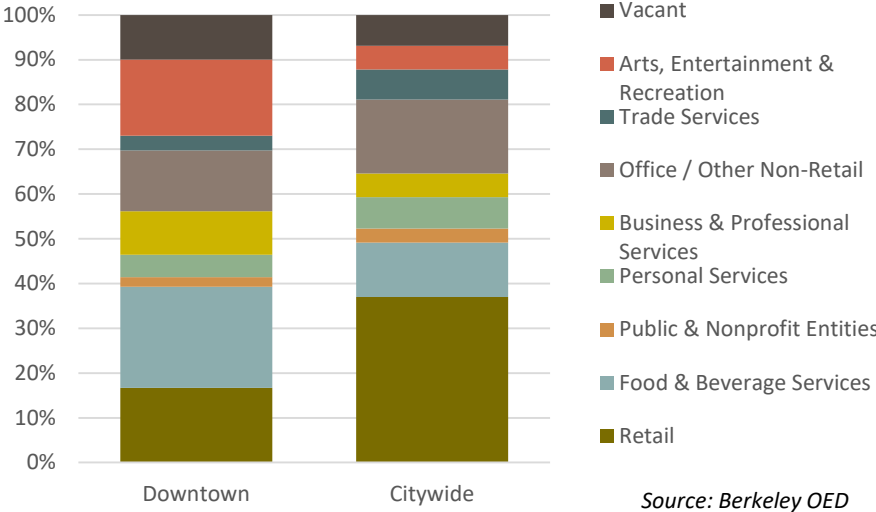
DOWNTOWN: 2020 Snapshot



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% of total ground floor commercial space in the district compared to 6.9% citywide. As of Q4 2020, the vacancy rate in Downtown is 9.9%, which has nearly doubled since late 2019 (5.1%). Sales tax revenue generated in 2020 by Food & Beverage services dropped to \$755,043, from its peak of \$1.17 million dollars in 2019 (-36%), and Retail sales tax collected also decreased by \$125,000 (-26%).

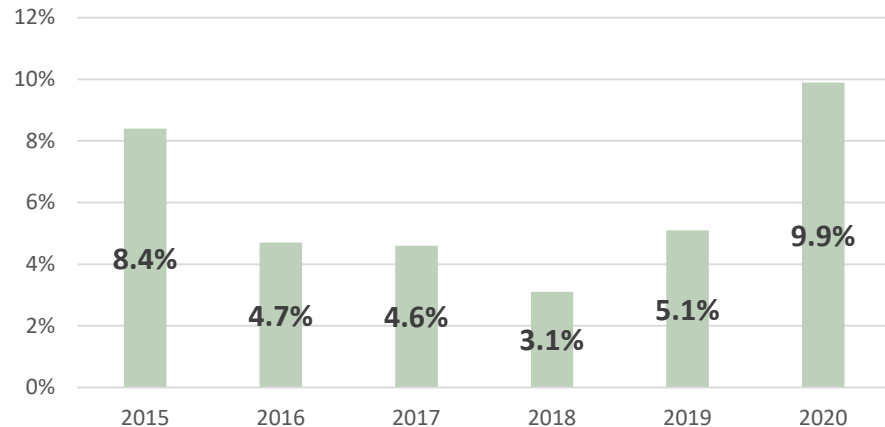


Ground Floor Commercial Business Mix (by Square Footage), 2020 Q4



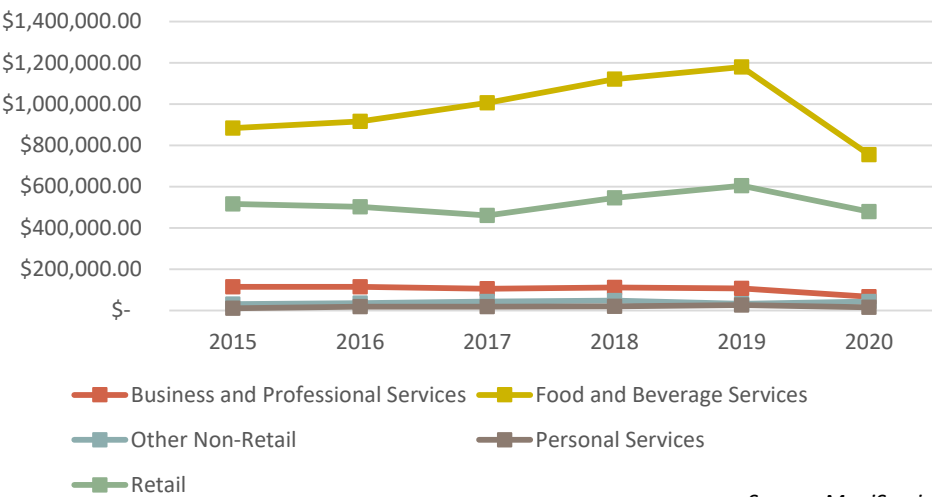
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020



Source: MuniServices

ELMWOOD: 2020 Snapshot

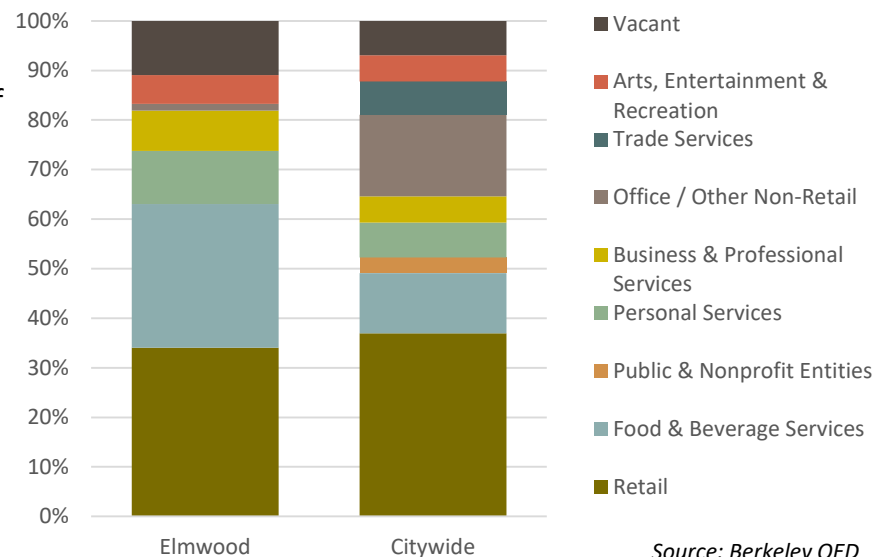


The Elmwood is a compact three block commercial district along College Avenue near the Berkeley-Oakland border and the neighboring Rockridge shopping district. The Elmwood district is characterized by a high concentration (29.0%) of Food & Beverage services and personal services (10.7%), and is a walkable, neighborhood-serving commercial district. As of Q4 2020, the district's vacancy rate by square footage is 10.9%, a 3.6% increase from Q3 2019 (7.3%).

Sales tax collected from the Food and Beverage sector in the Elmwood decreased by \$42,953, from 2019 to 2020, and by \$40,642 for Retail, as indoor capacity for retail shopping was limited, and indoor dining was prohibited due to the pandemic.

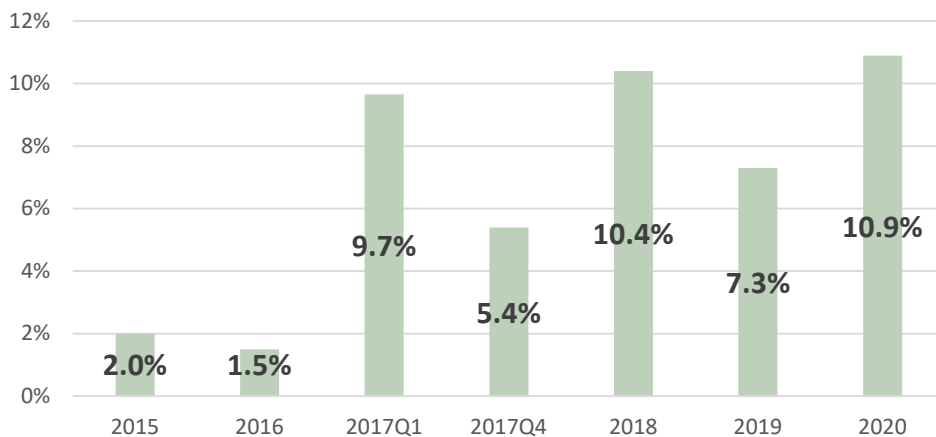


Business Mix (by Square Footage), 2020 Q4



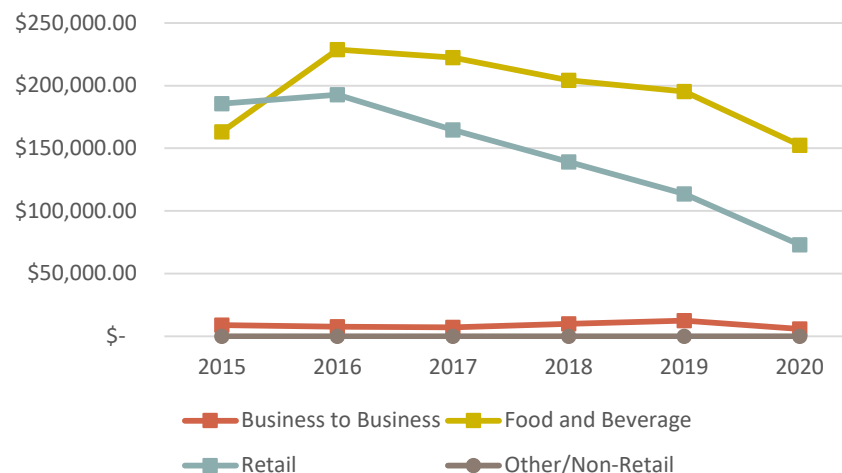
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020



Source: MuniServices

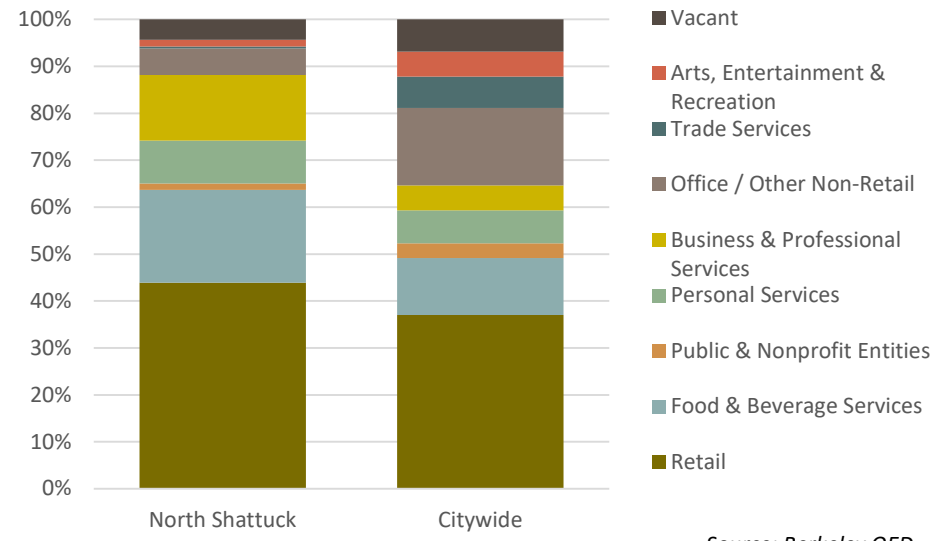
NORTH SHATTUCK: 2020 Snapshot

North Shattuck is one of Berkeley's oldest commercial districts, 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 Q4 2020, the district's vacancy rate by square footage is 4.3%, which is up by over 3% from one of the lowest ever vacancy rates of 0.7% in 2019.

Sales tax collected from the Food and Beverage sector in North Shattuck decreased by \$117,811, from 2019 to 2020, and by \$48,532 for Retail, as indoor capacity for retail shopping was limited, and indoor dining was prohibited due to the pandemic.

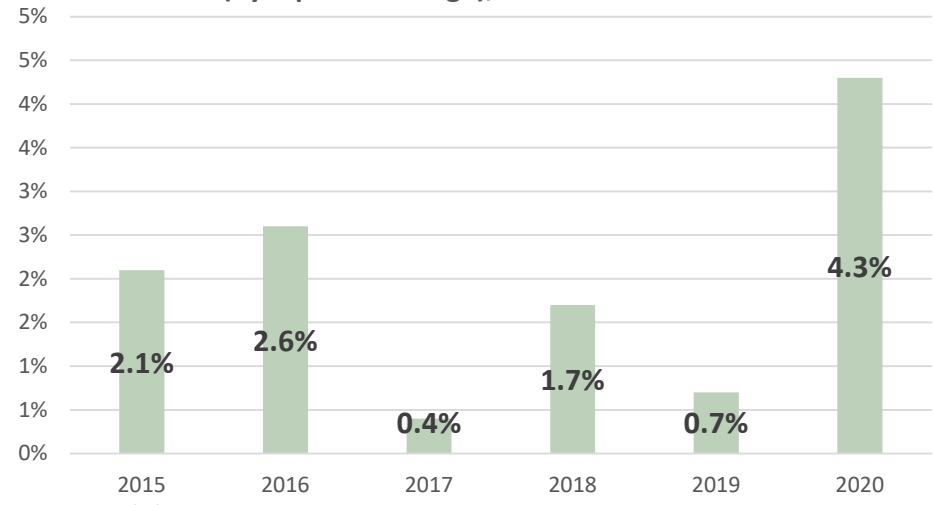


Business Mix (by Square Footage), 2020 Q4



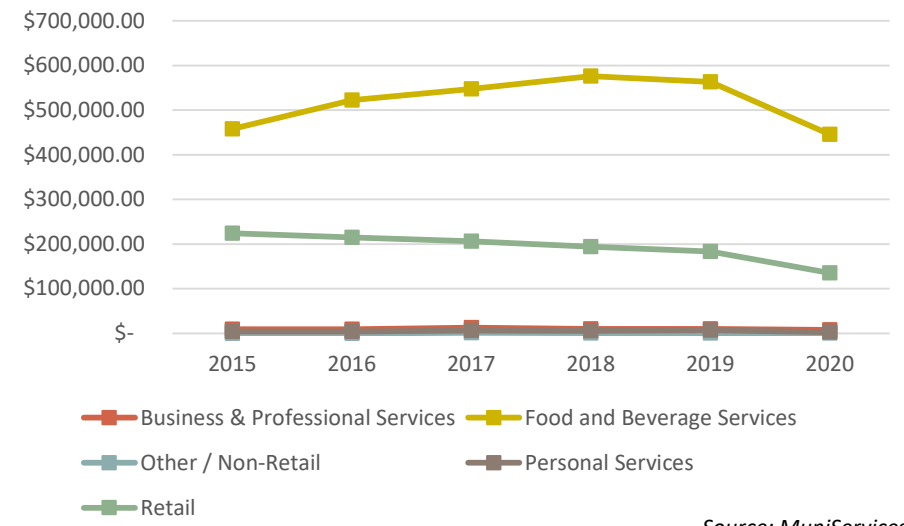
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020

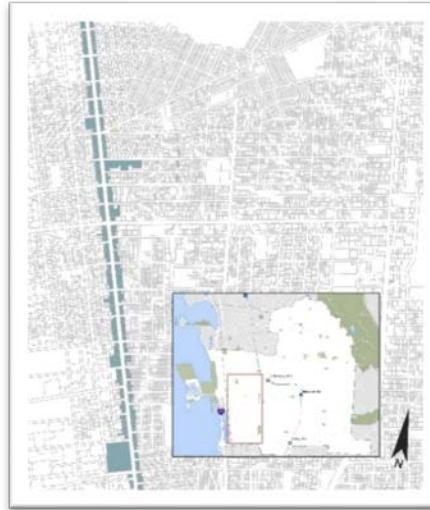


Source: MuniServices

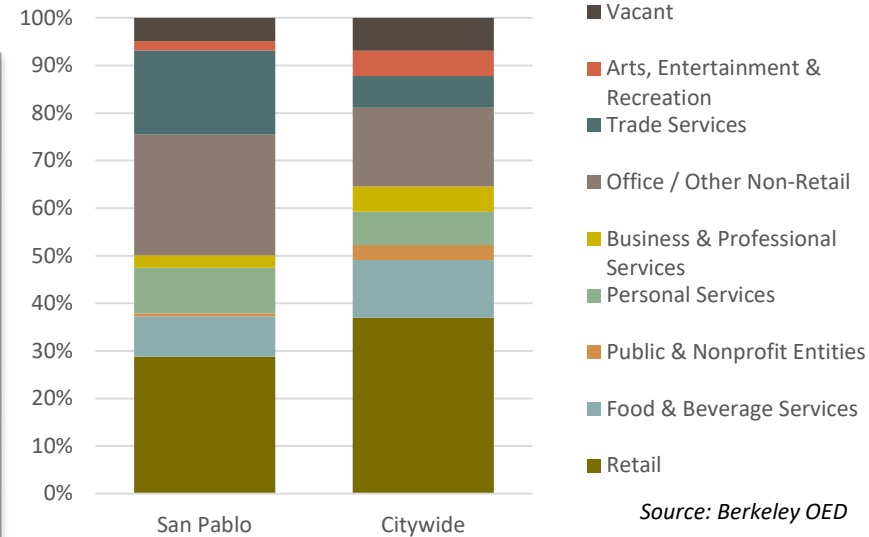
SAN PABLO: 2020 Snapshot



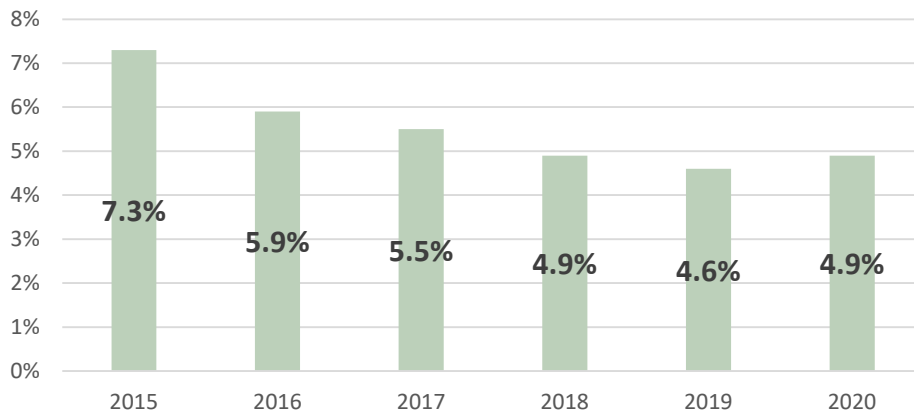
San Pablo Avenue is Berkeley's largest commercial corridor, running the entire north-south length of the City. San Pablo is characterized by a high concentration of Trade Services (17.7%), including over 60 automobile services. San Pablo functions more as a regional destination for specific uses rather than a walkable, neighborhood-serving commercial district; as such, it features smaller percentages of Food & Beverage Services (8.5%) and Personal Services (9.6%). In Q4 2020, the district's vacancy rate by square footage was 4.9%, the same rate as Q4 of 2018, and up three tenths of a percent from late 2019. Retail Sales tax revenue collected in 2020 has decreased by \$166,972 since 2019, but continues to be the largest source of tax revenue for the area.



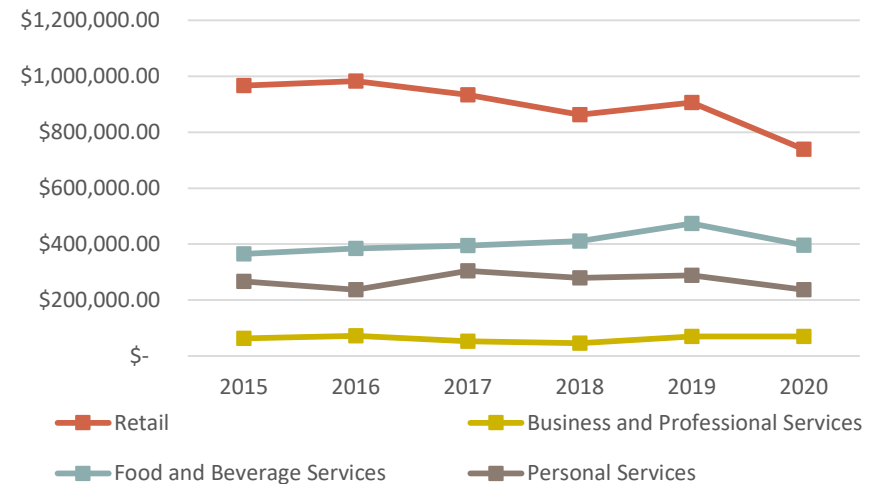
Business Mix (by Square Footage), 2020 Q4



Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Sales Tax Revenue by Sector, 2015-2020



SOLANO: 2020 Snapshot

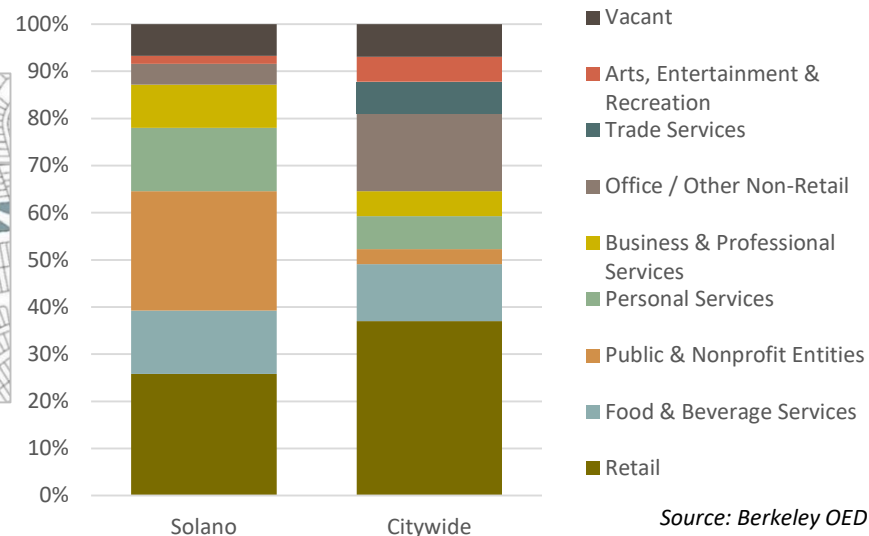


Solano is a small commercial district in North Berkeley, with a total of 147 commercial spaces and approximately 274,800 square feet of commercial space. It shares a border with Albany and is situated next to a large elementary school and an active neighborhood of single-family homes. Solano has a large key asset (the former Oaks Theatre) that is due to be occupied by a climbing gym in late 2021. The district's vacancy rate by square footage is 6.7%, a 4.1% increase from Q3 2019 (2.6%).

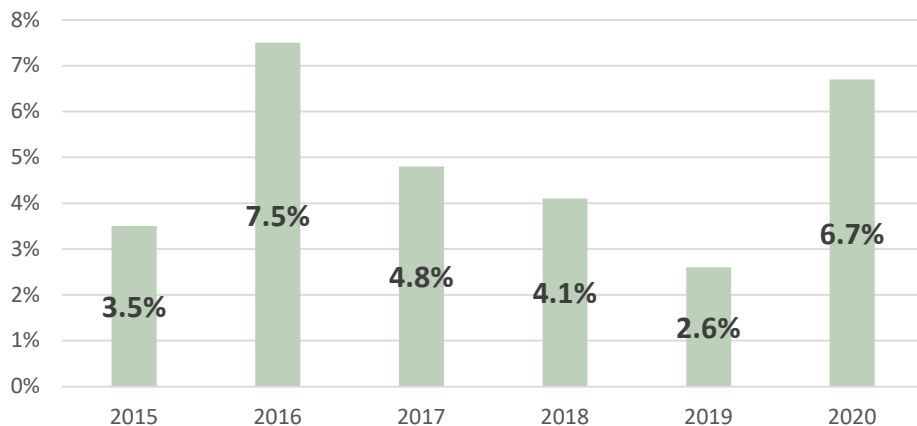


Sales tax collected from the Food and Beverage sector along Solano Avenue decreased by \$20,678, from 2019 to 2020, and by \$28,514 for Retail, as indoor capacity for retail shopping was limited, and indoor dining was prohibited due to the pandemic.

Business Mix (by Square Footage), 2020 Q4

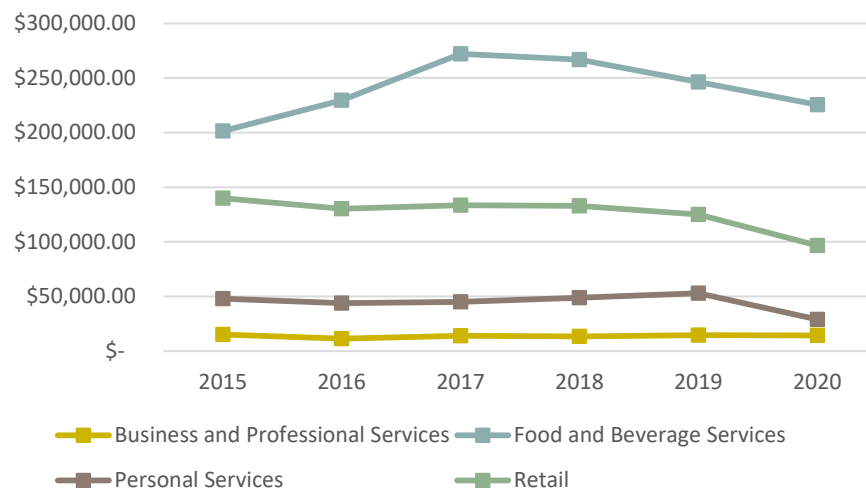


Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020



Source: MuniServices

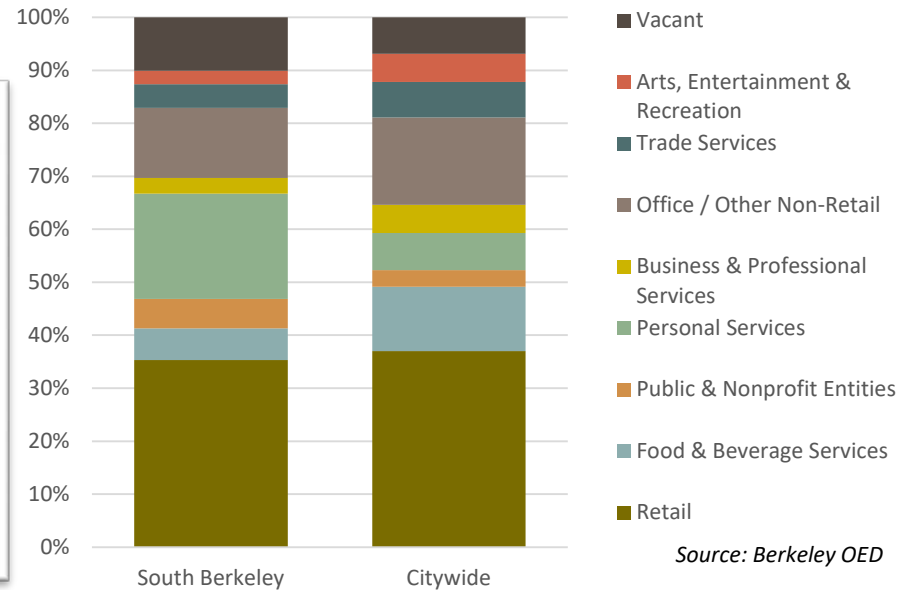
SOUTH BERKELEY: 2020 Snapshot



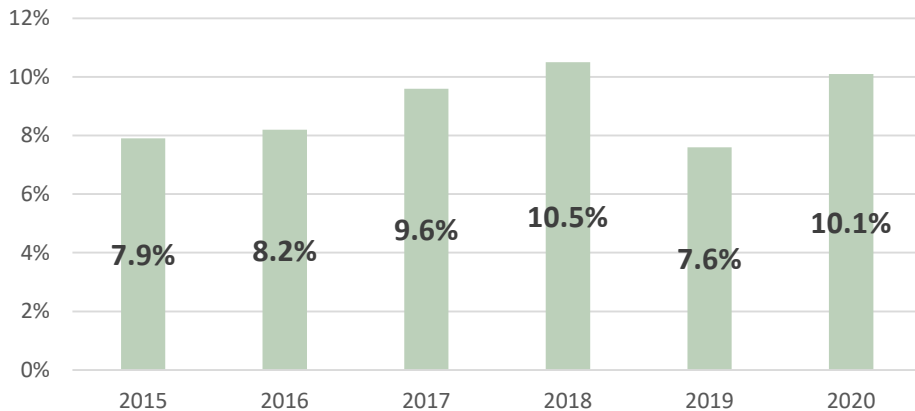
South Berkeley is a large district stretching over an area known for its cultural diversity and includes the Lorin District, the Sacramento corridor, and the South Shattuck area. South Berkeley includes several car dealerships, which accrue significant retail sales tax revenue for the City. The area also features a high concentration of Personal Services businesses (19.8% vs. 7.0% citywide) but is under-served by Food & Beverage services, which account for only 6.0% of ground floor commercial space, as compared to 12.1% citywide. As of Q4 2020, the district's vacancy rate by square footage was 10.1%, a 2.5% increase from 2019.



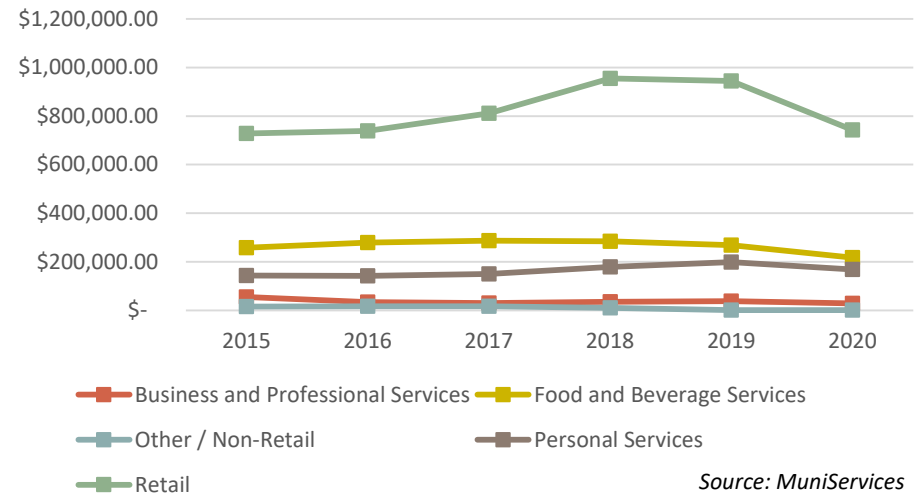
Business Mix (by Square Footage), 2020 Q4



Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Sales Tax Revenue by Sector, 2015-2020



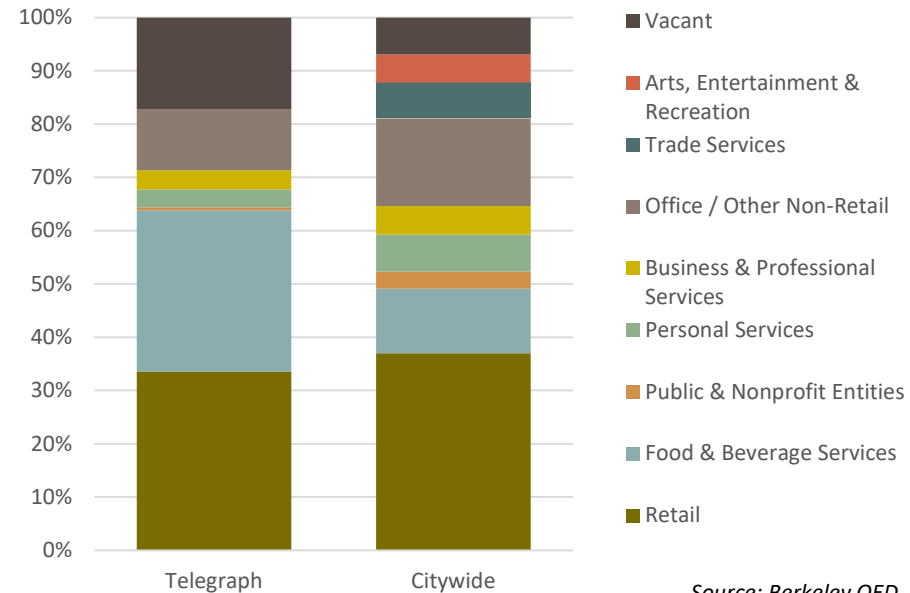
TELEGRAPH: 2020 Snapshot



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 30.3% of Food & Beverage services accounting for ground floor commercial space in the district, as compared to 12.1% Citywide. As of Q4 2020, the district's ground floor commercial vacancy rate at 17.2% has increased dramatically from 2019's 4.4%, nearly matching the past peak of 17.9% in 2012. New ground floor leases and developments are anticipated along Telegraph Avenue in 2021, including the large Enclave Building at Telegraph and Haste St.

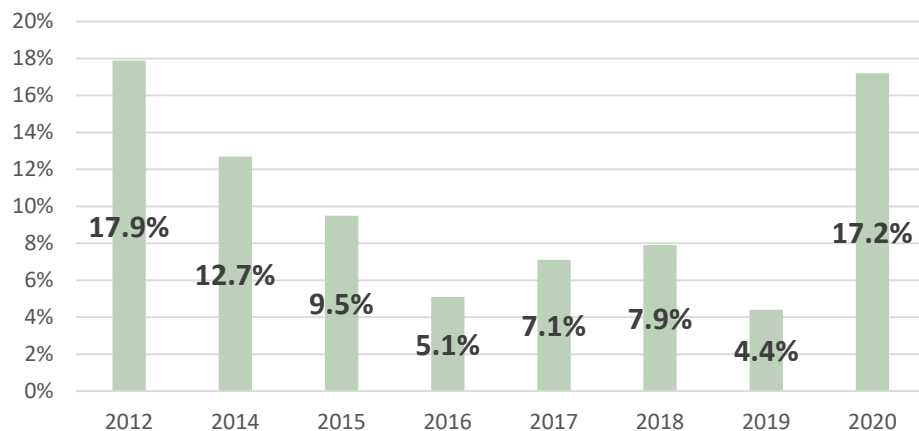


Business Mix (by Square Footage), 2020 Q4



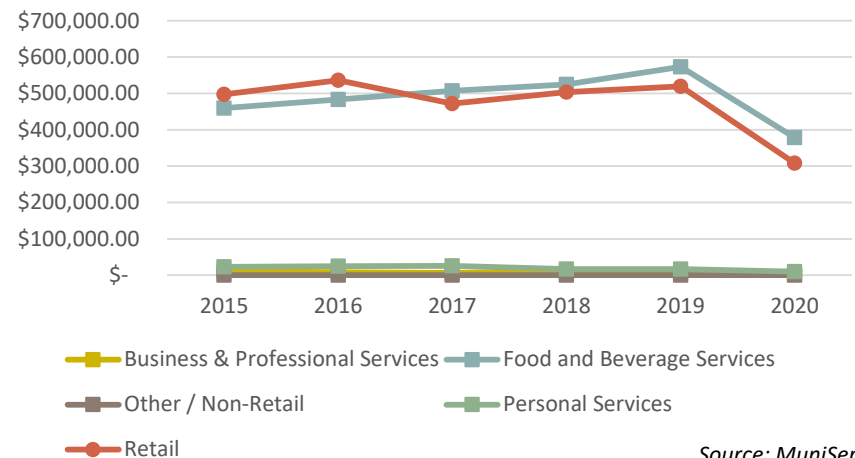
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2012-2020



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020



Source: MuniServices

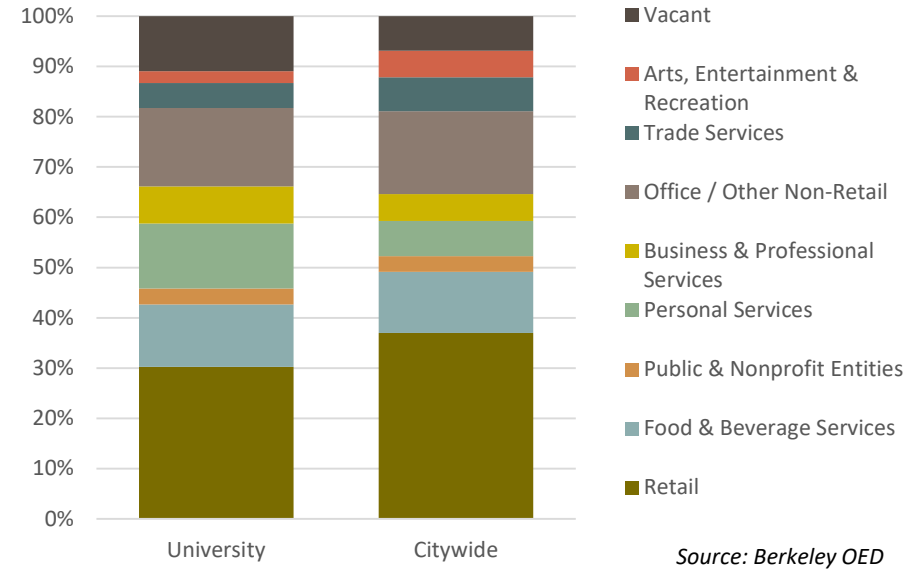
UNIVERSITY: 2020 Snapshot



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. Since 2015, Personal Services (including Transportation receipts) and Food & Beverage Services have generated the most sales tax revenue for the district. Retail sales tax collected in 2020 decreased by \$28,674 from 2019 due chiefly to the pandemic. The 2020 vacancy rate matches 2018's number at 11% but has increased by 2.2% from 2019's rate of 7.8%.

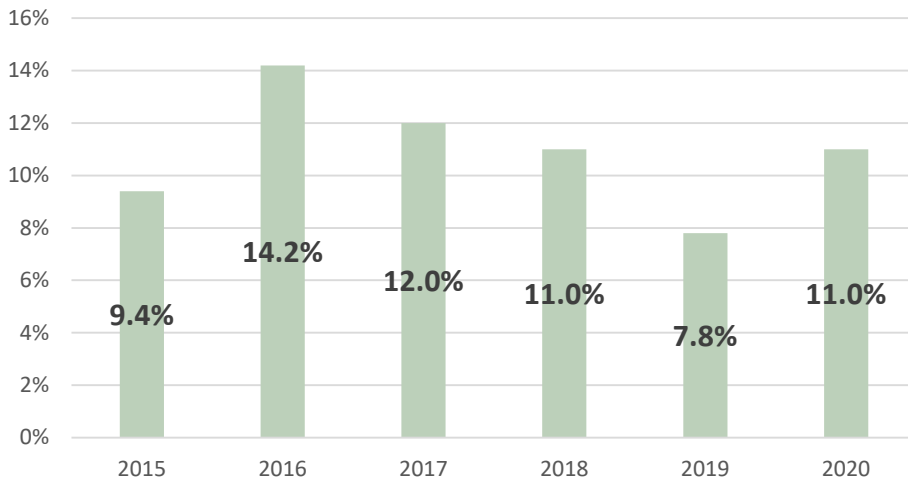


Business Mix (by Square Footage), 2020 Q4



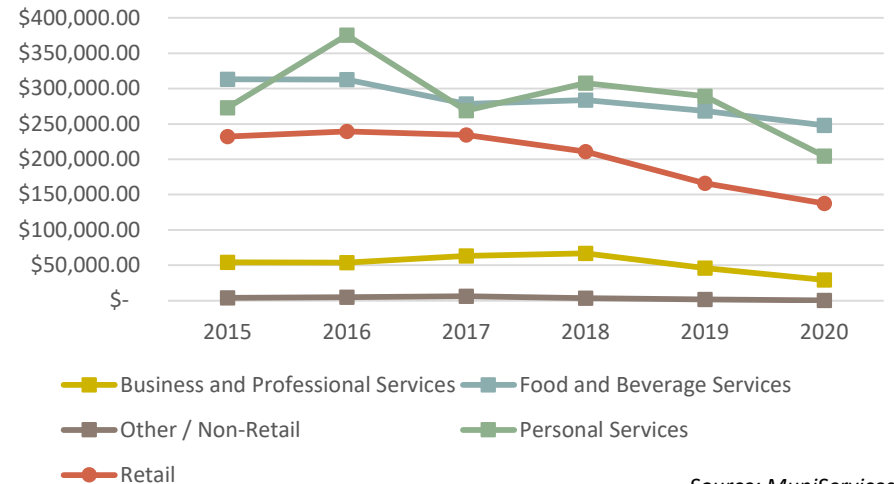
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020



Source: MuniServices

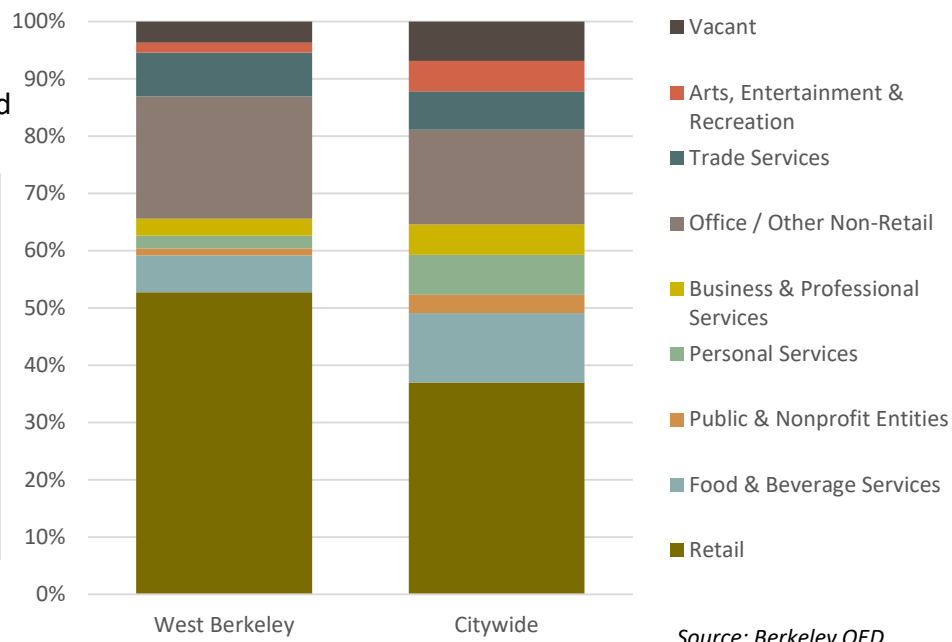
WEST BERKELEY: 2020 Snapshot



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. Retail accounts for 52.7% of ground floor commercial space in the district, as compared to 36.9% citywide. West Berkeley also has a smaller percentage of square footage devoted to Food and Beverage (6.4%) businesses than the citywide rate of 12.1%. The commercial vacancy rate in Q4 of 2020 is 3.7%, a decrease from 2019's 5.4%. Sales tax revenue has decreased in this area for all industries except for "Other / Non-Retail" health care related sales tax collection (up by \$7,144 or +21%).

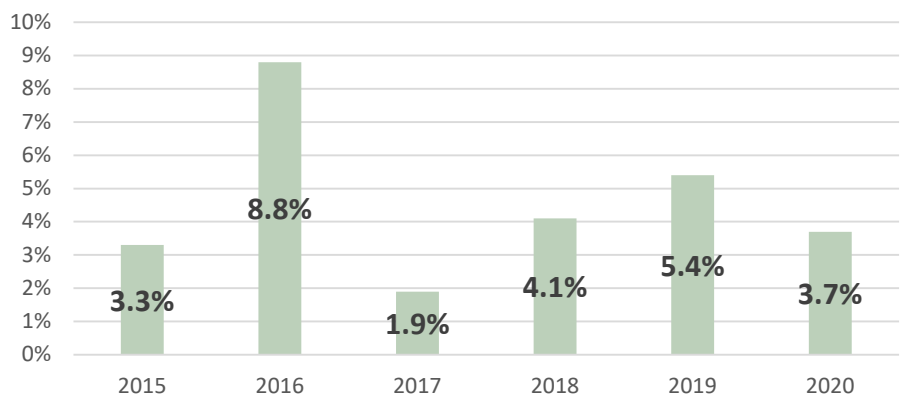


Business Mix (by Square Footage), 2020 Q4



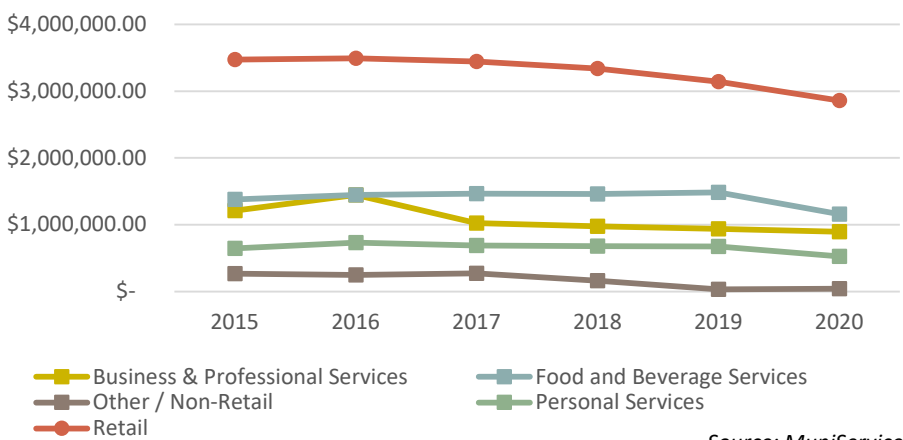
Source: Berkeley OED

Ground Floor Commercial Vacancy Rate (by Square Footage), 2015-2020



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020



Source: MuniServices

NEIGHBORHOOD (C-N): 2020



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% of the city’s total sales tax. They also include a few large Arts, Entertainment and Recreation facilities (30% by square footage) and Public and Non-Profit entities (12.4% compared to 3% citywide).

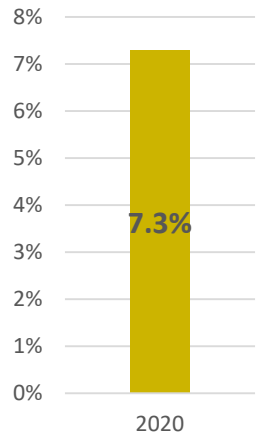


These areas include commercial nodes at the following intersections:

- 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

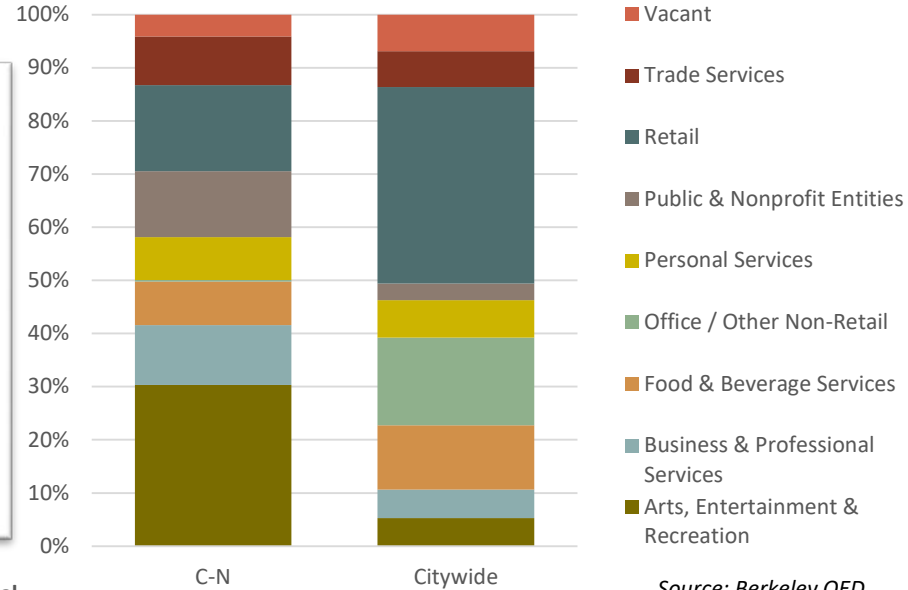
The first field data from the C-N areas was collected during the COVID-19 Pandemic of 2020 to track the impact of shelter-in-place orders on neighborhood-serving retail and service businesses.

Ground Floor Commercial Vacancy Rate (by Square Footage), Q4 2020



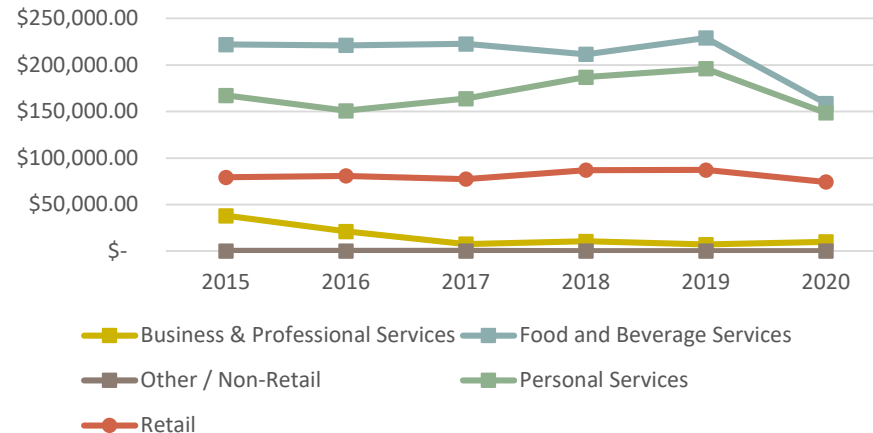
Source: Berkeley OED

Business Mix (by Square Footage), 2020 Q4



Source: Berkeley OED

Sales Tax Revenue by Sector, 2015-2020



Source: MuniServices