

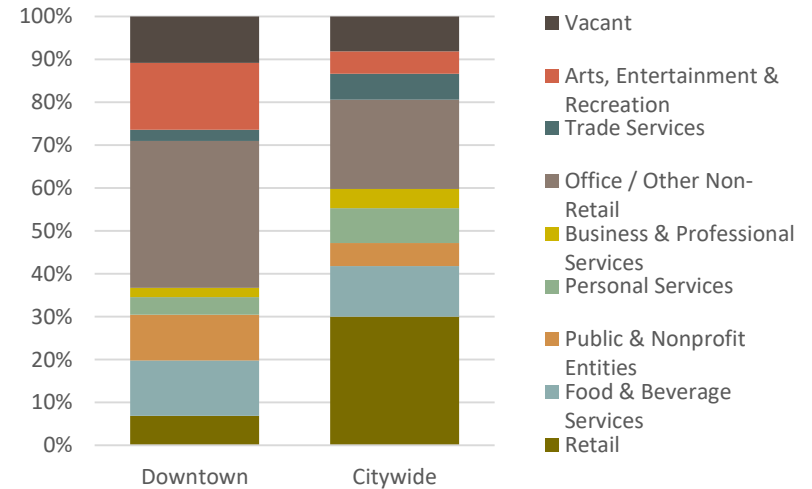
# Downtown: 2023 Snapshot



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 15.6% of total ground floor commercial space in the district compared to 5.2% citywide. As of Q4 2023, the vacancy rate in Downtown is 10.8%, slightly above the initial COVID year of 2020 (9.9%). Sales tax revenue generated by Food & Beverage services reached its nadir in 2021 (\$565,561) but has returned and exceeded pre-COVID levels with \$1.2M generated in 2023.

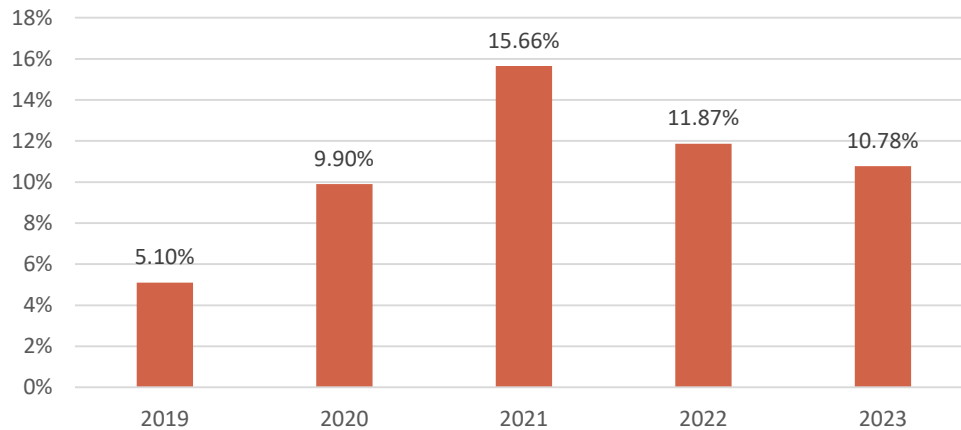


## Ground Floor Commercial Business Mix (by Square Footage), 2023 Q4



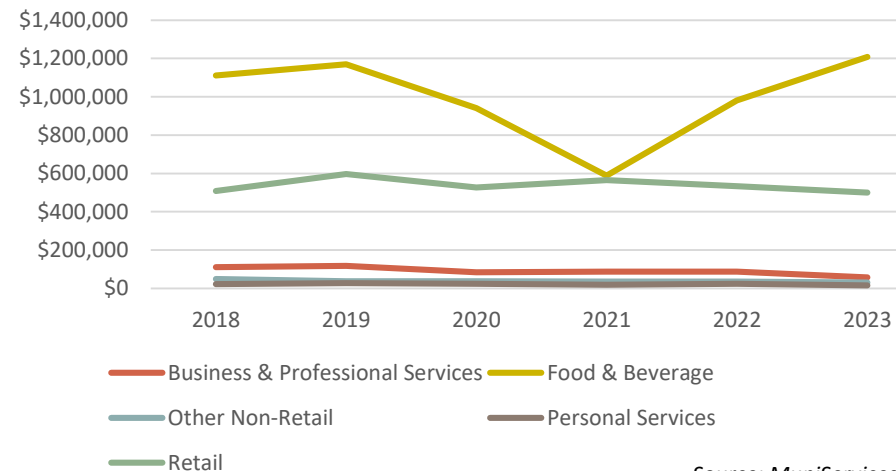
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices

# Elmwood: 2023 Snapshot

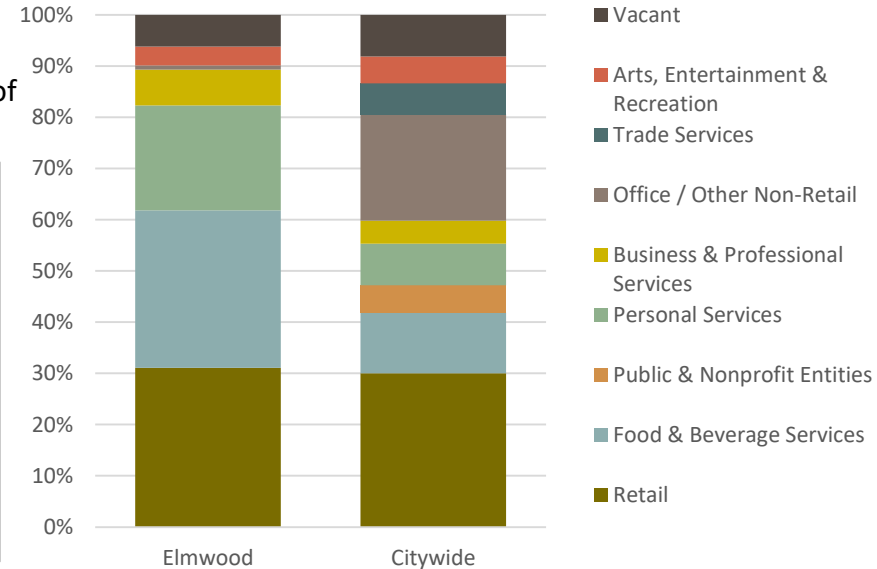


The Elmwood is a compact three block commercial district along College Avenue near the Berkeley-Oakland border and the neighboring Rockridge shopping district. The Elmwood district is characterized by a high concentration (30.7%) of Food & Beverage services and Personal Services (20.1%), and is a walkable, neighborhood-serving commercial district. As of Q4 2023, the district's vacancy rate by square footage is 6.2%.

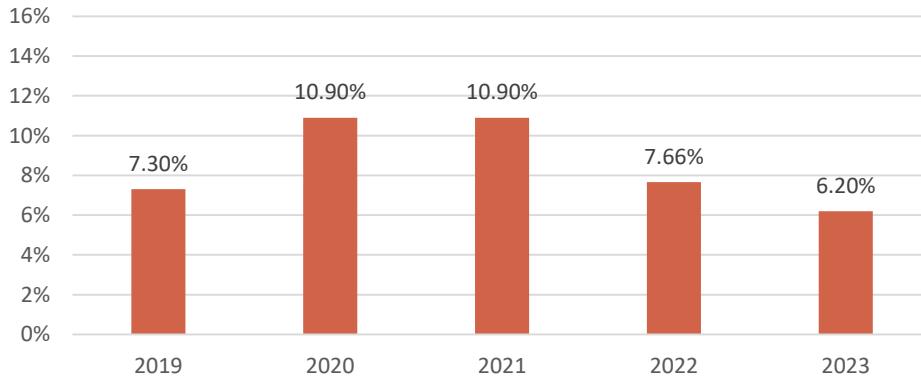
Sales tax collected from the Food and Beverage sector in the Elmwood increased in 2023 to \$210,570, from a low of \$140,812 in 2021. Sales tax collected from the Retail sector decreased slightly in 2023 to \$112,610, but remained above retail sales tax collected in 2021 (\$88,709) when the pandemic was in an acute phase.



## Business Mix (by Square Footage), 2023 Q4

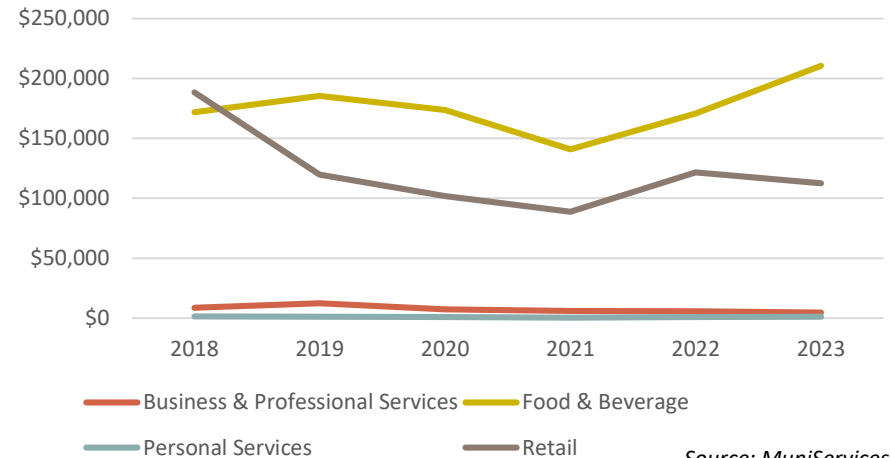


## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices

# North Shattuck: 2023 Snapshot

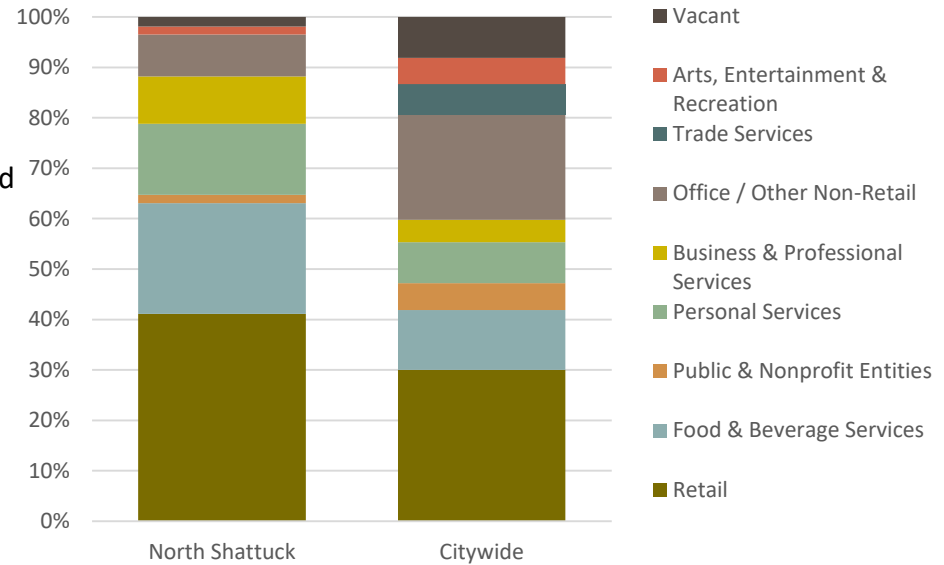


North Shattuck is one of Berkeley's oldest commercial districts, just north of Downtown. The district is characterized by a high concentration of well-known, long-standing, and celebrated restaurants, including Chez Panisse and the Cheeseboard. North Shattuck is both a walkable, neighborhood-serving commercial district as well as a global destination for food and dining. As of Q4 2023, the district's vacancy rate by square footage is 1.9%, a marked decrease from 4.3% in 2022 Q4.

Sales tax collected from the Food and Beverage sector in North Shattuck increased in 2023 to \$533,418, from its 2021 low (\$298,196), though sales tax collected from the retail sector continued to decline from \$154,510 in 2022 to \$134,219 in 2023.

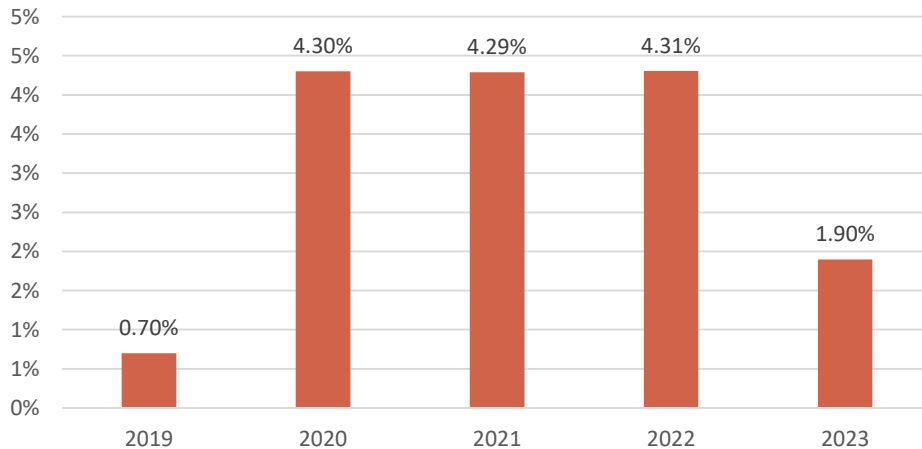


## Business Mix (by Square Footage), 2023 Q4



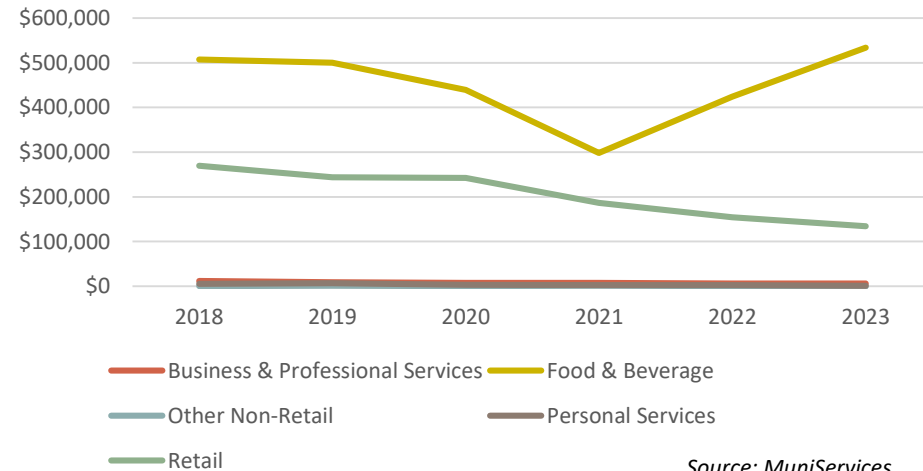
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices

# San Pablo: 2023 Snapshot

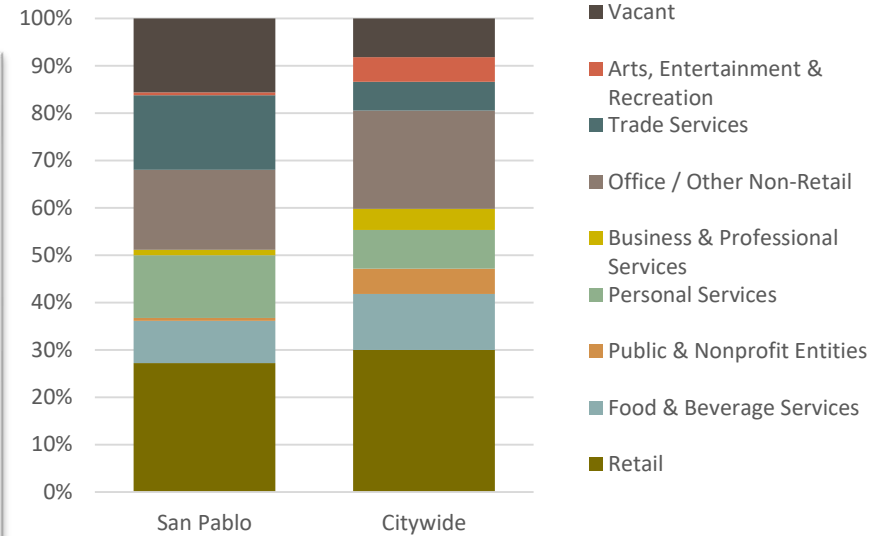


San Pablo Avenue is Berkeley's largest commercial corridor, running the entire north-south length of the City. San Pablo is characterized by a high concentration of Trade Services (15.7%), including automobile services.

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 (8.9%) and a larger portion of Personal Services (13.3%) than the city as a whole. In 2023, the district's vacancy rate by square footage is 15.5%, up from 10.7% in 2022. Retail Sales tax revenue collected in 2023 has decreased by \$247,779 since 2022, yet continues to be the corridor's largest source of tax revenue.

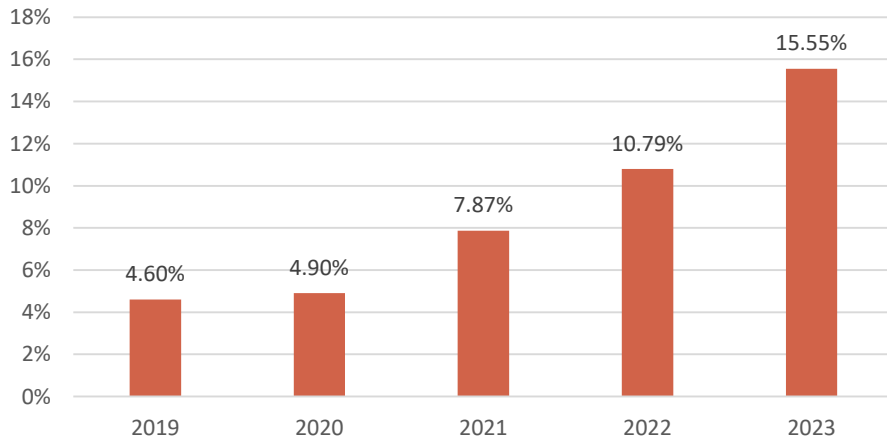


## Business Mix (by Square Footage), 2023 Q4



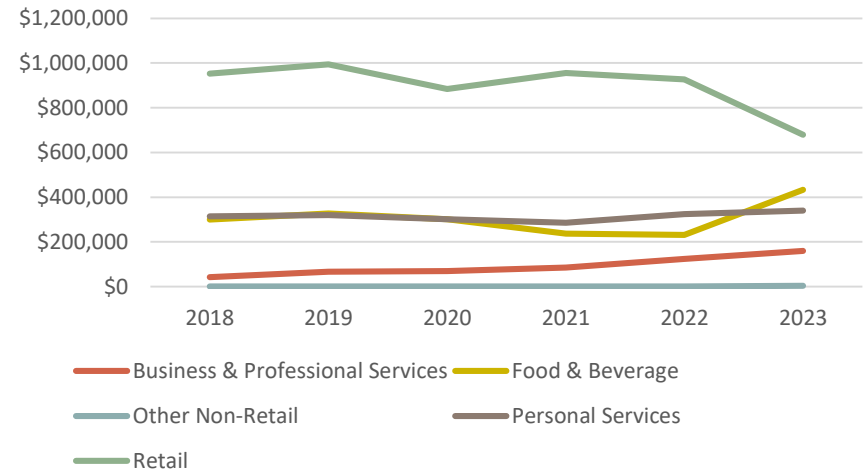
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices

# Solano: 2023 Snapshot



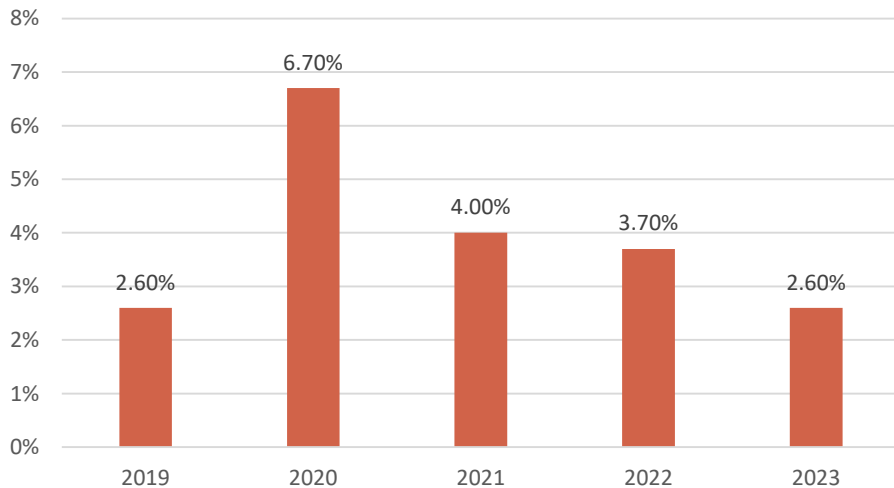
Solano is a small commercial district in North Berkeley, with a total of 148 commercial spaces and approximately 176,800 square feet of commercial space. It shares a border with Albany and is situated next to a large elementary school and an active neighborhood of single-family homes.

The former Oaks Theatre is due to be occupied by a climbing gym that will open in 2024. The district's vacancy rate by square footage decreased from 3.7% in 2022 to 2.6% in 2023.



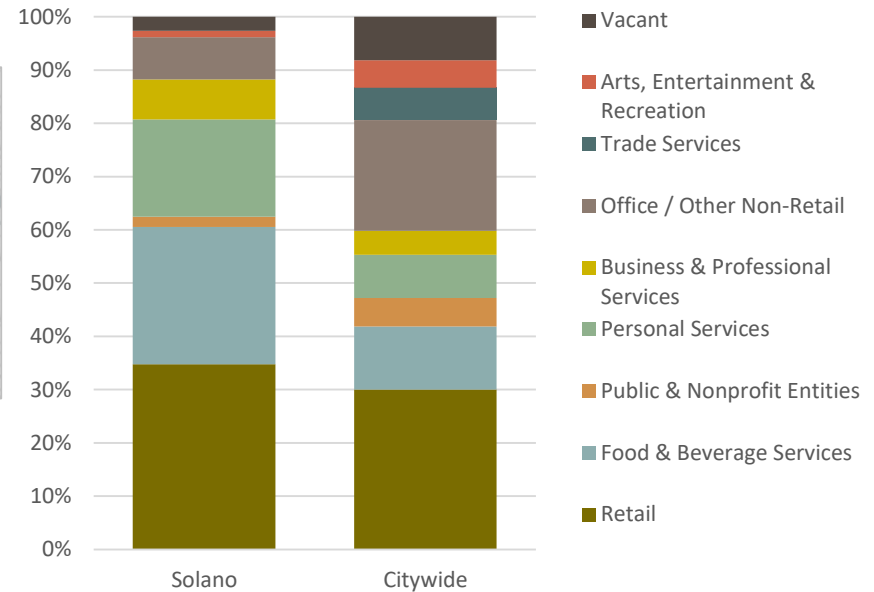
Sales tax collected from the Food and Beverage sector along Solano Avenue increased by \$17,982 from 2022 to 2023, and sales tax collected from the Retail sector decreased from 2022, to \$98,055.

**Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023**



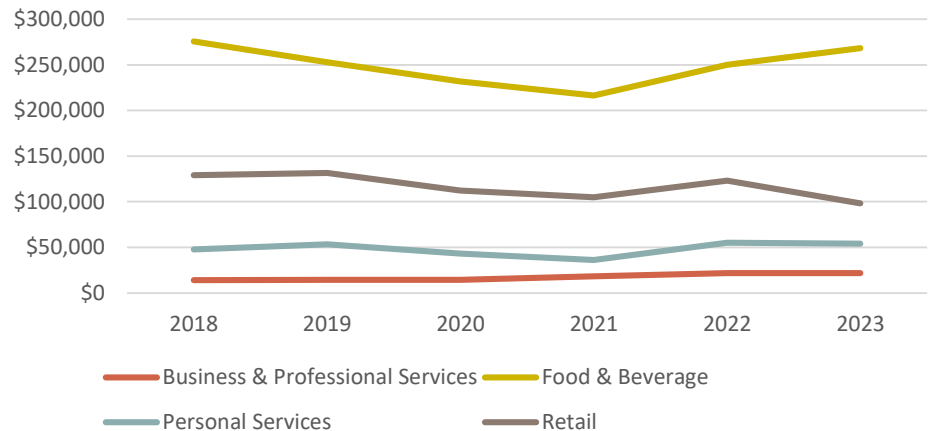
Source: Berkeley OED

**Business Mix (by Square Footage), 2023 Q4**



Source: Berkeley OED

**Sales Tax Revenue by Sector, 2018-2023**



Source: MuniServices

# South Berkeley: 2023 Snapshot

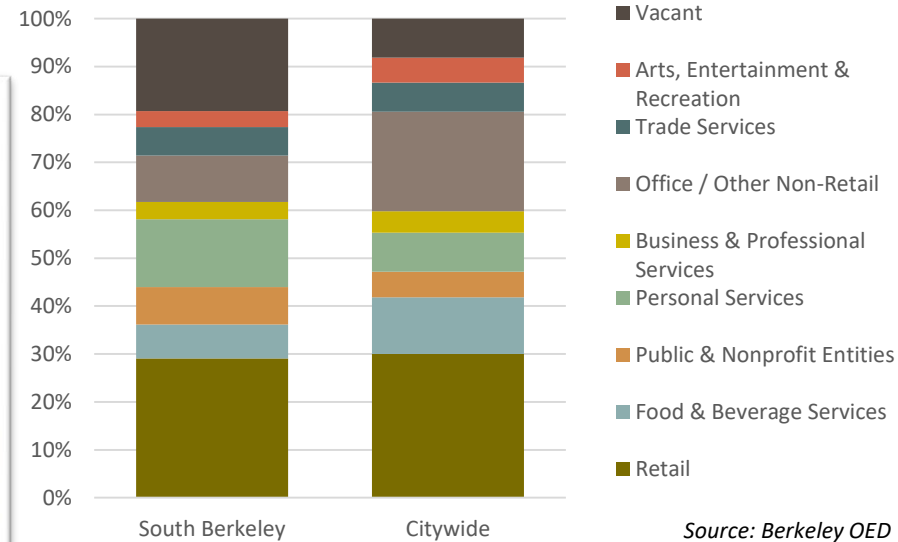


South Berkeley is a large district stretching over an area known for its cultural diversity and includes the Lorin District, the Sacramento corridor, and the South Shattuck area. South Berkeley includes car dealerships, which accrue retail sales tax revenue for the City.

The area also features a high concentration of Personal Services businesses (14.2%, vs. 8.1% citywide) but is under-served by Food & Beverage services, which account for only 7.1% of ground floor commercial space, as compared to 11.8% citywide. As of Q4 2023, the district's vacancy rate by square footage was 19.2%, a 7.5% increase from 2022. The big jump in vacancy rate can be partly attributed to key large floorplate retailers closing in 2023.

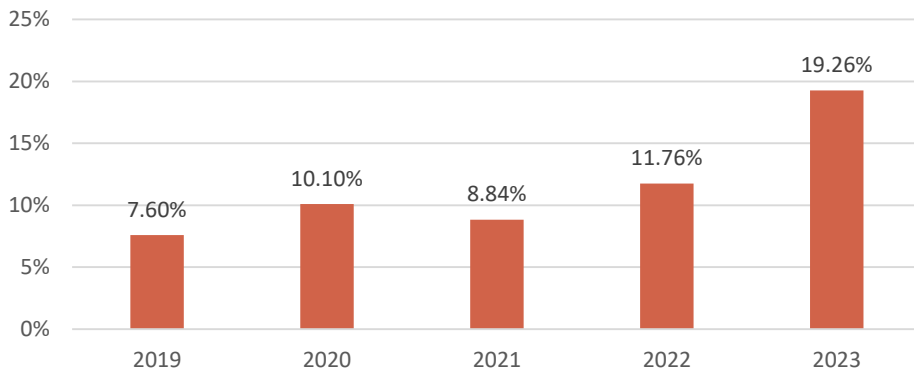


## Business Mix (by Square Footage), 2023 Q4



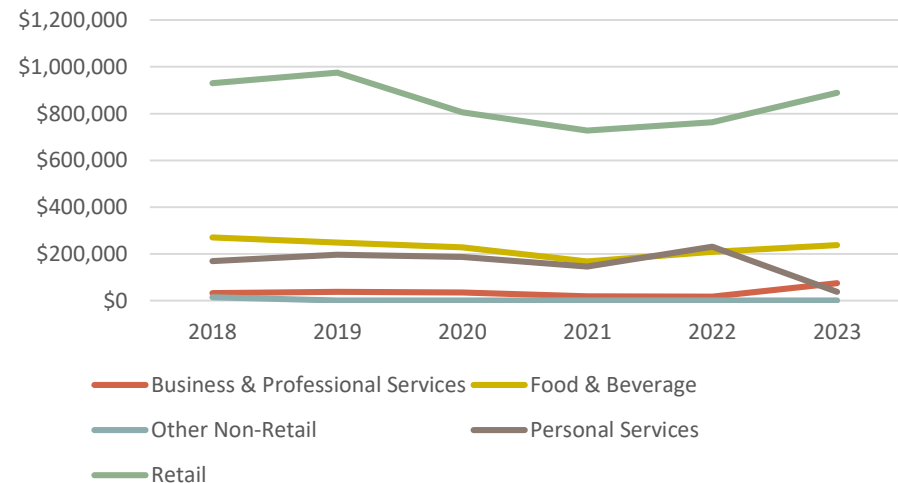
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices

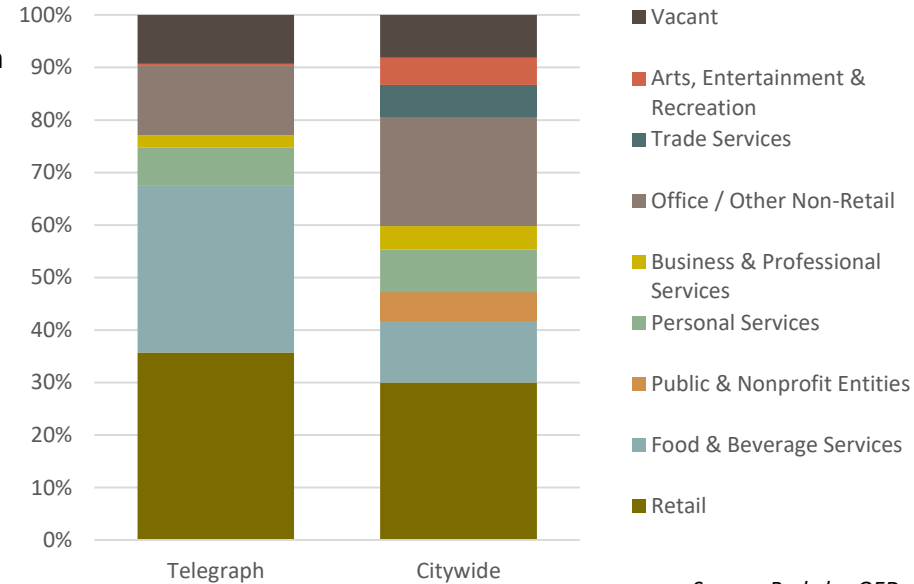
# Telegraph: 2023 Snapshot



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 in the last decade, with 31.8% of Food & Beverage services accounting for ground floor commercial space in the district, as compared to 11.8% Citywide. Telegraph's ground floor inventory of Retail accounts for 35.7% of the business mix, slightly more than the 30% observed citywide. As of Q4 2023, the district's ground floor commercial vacancy rate of 9.3%, was slightly higher than 2022 (8.5%). Food and Beverage services slightly outperform retail with respect to sales tax collected; both increased in 2023.

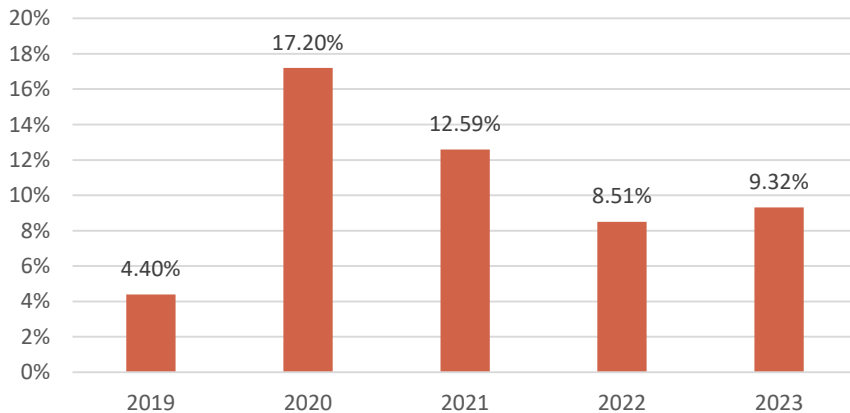


## Business Mix (by Square Footage), 2023 Q4



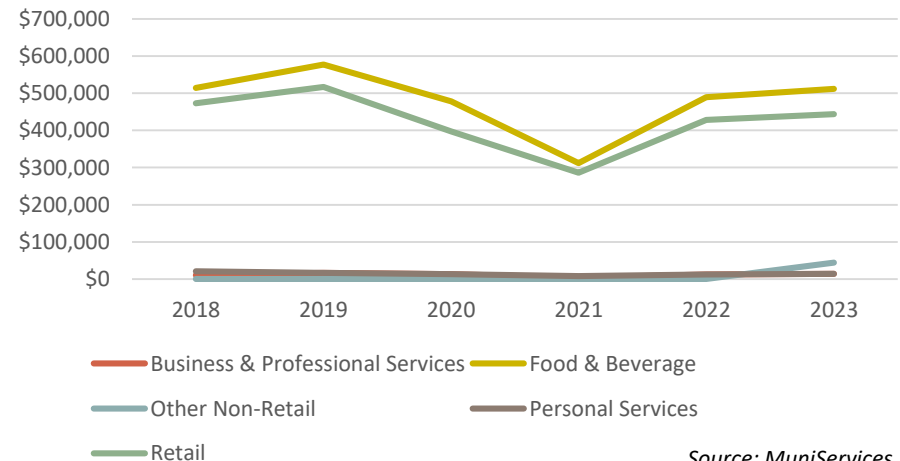
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices

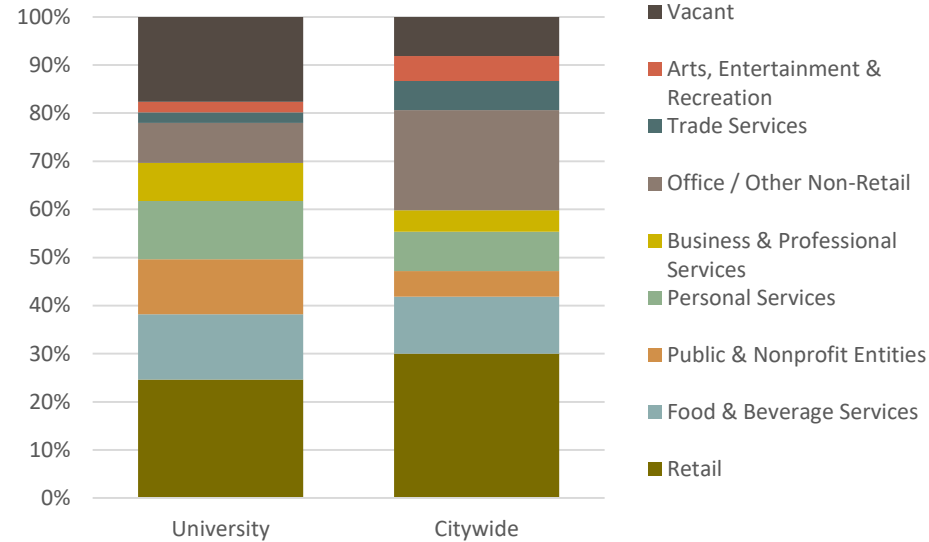
# University: 2023 Snapshot



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 2018, Retail and Food & Beverage services have generated the most sales tax revenue for the district. Retail sales tax collected in 2023 decreased by \$95,758 from 2022, and sales tax from Food & Beverage continued to experience growth. The 2023 vacancy rate increased by 4.8% from 2022 to 17.7%.

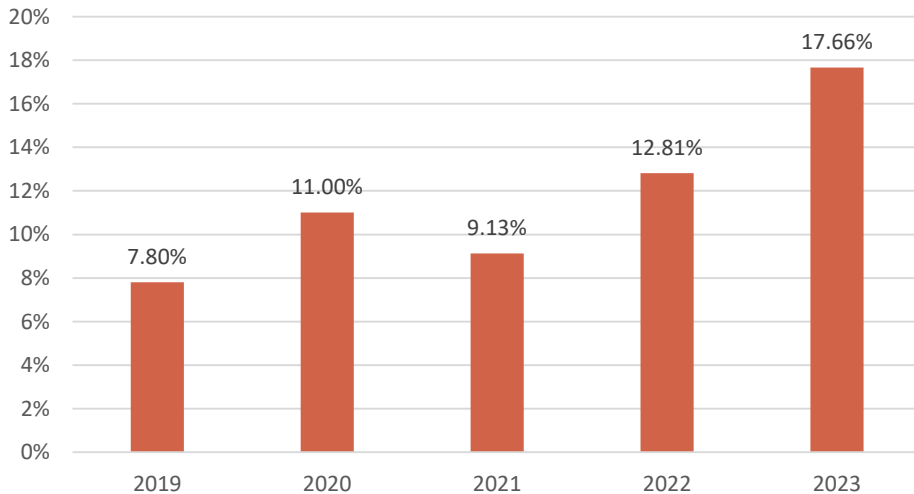


## Business Mix (by Square Footage), 2023 Q4



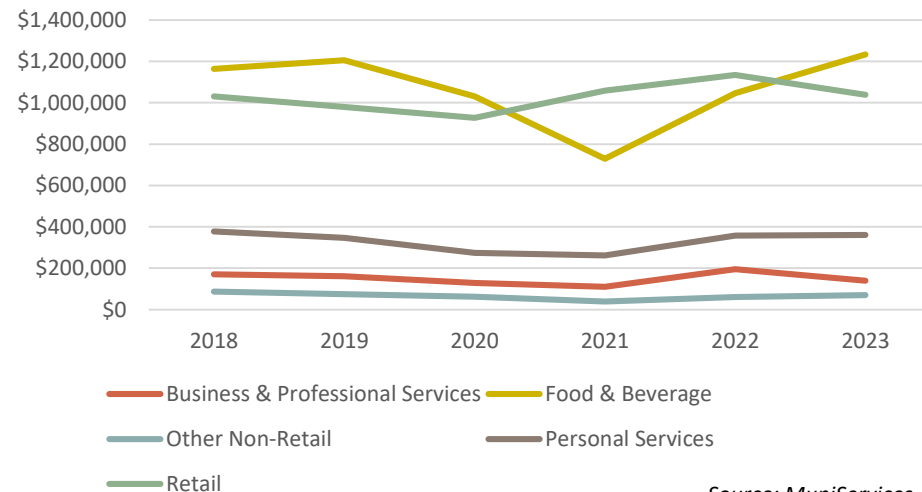
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices



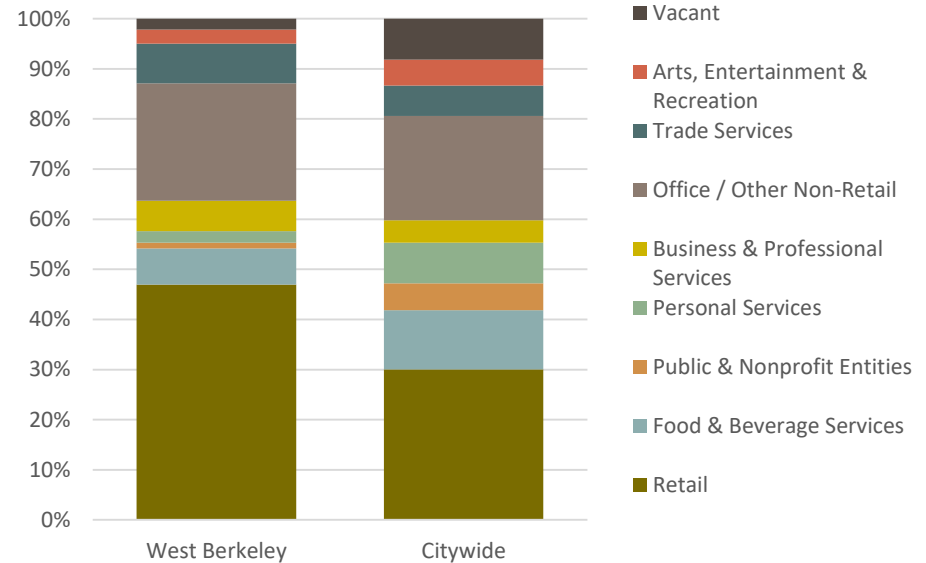
# West Berkeley: 2023 Snapshot



West Berkeley represents all commercial spaces west of San Pablo Avenue, including 4<sup>th</sup> Street and the Gilman District. 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 47% of ground floor commercial space in the district, as compared to 30% citywide. West Berkeley also has a smaller percentage of square footage devoted to Food and Beverage (7.2%) businesses than the citywide rate of 11.8%. The commercial vacancy rate in Q4 2023 is 2.1%, a big drop from 2022's 5.2%. Sales tax revenue has increased in this area in all categories except Retail for an overall sales tax revenue increase of \$71,501 (+1.1%).

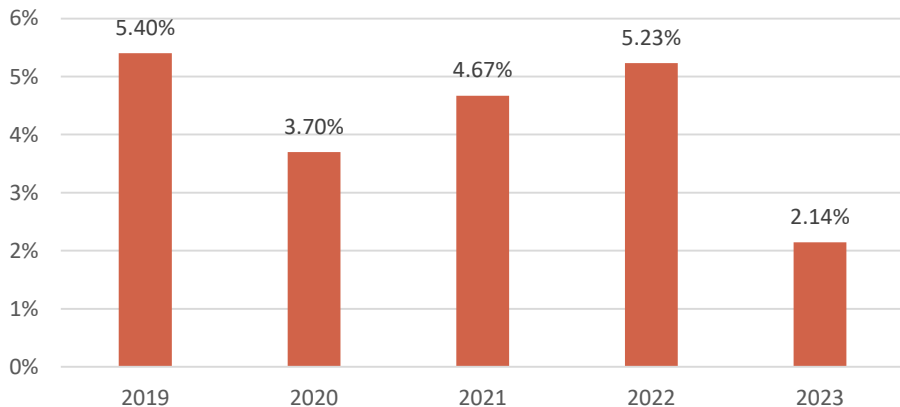


## Business Mix (by Square Footage), 2023 Q4



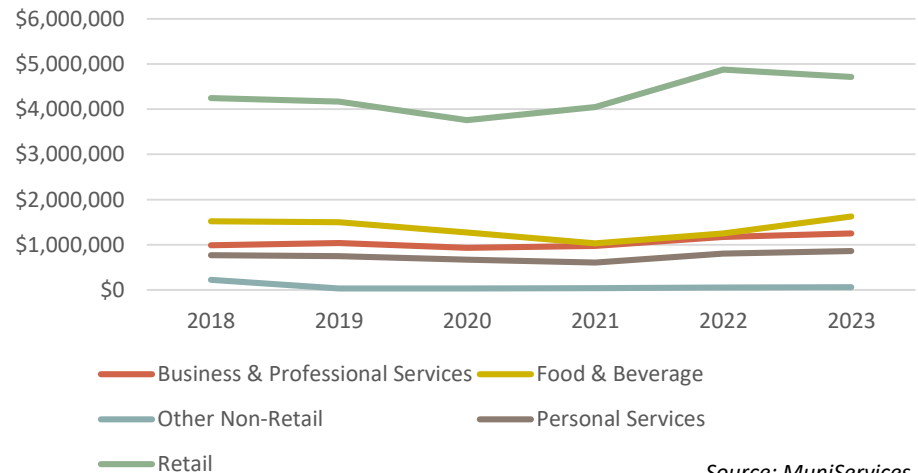
Source: Berkeley OED

## Ground Floor Commercial Vacancy Rate (by Square Footage), 2019-2023



Source: Berkeley OED

## Sales Tax Revenue by Sector, 2018-2023



Source: MuniServices

# Neighborhood (C-N): 2023 Snapshot



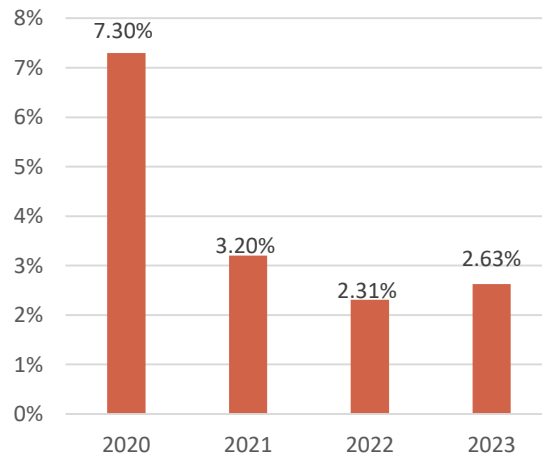
Across Berkeley there are 11 smaller commercial pockets, zoned as “C-N” or “Neighborhood Commercial.” These areas are one or two block collections of commercial enterprises that are distributed throughout Berkeley (see map).

The “C-N” areas represent nearly 190 commercial spaces, and approximately 390,000 square feet of commercial space. The C-N areas collectively generate 3% of the city’s total sales tax. They also include a large number of Personal Services companies (32% by square footage, compared to 8% citywide) and Public and Non-Profit entities (24.5% compared to 5.3% citywide). These areas include commercial nodes at the following intersections:



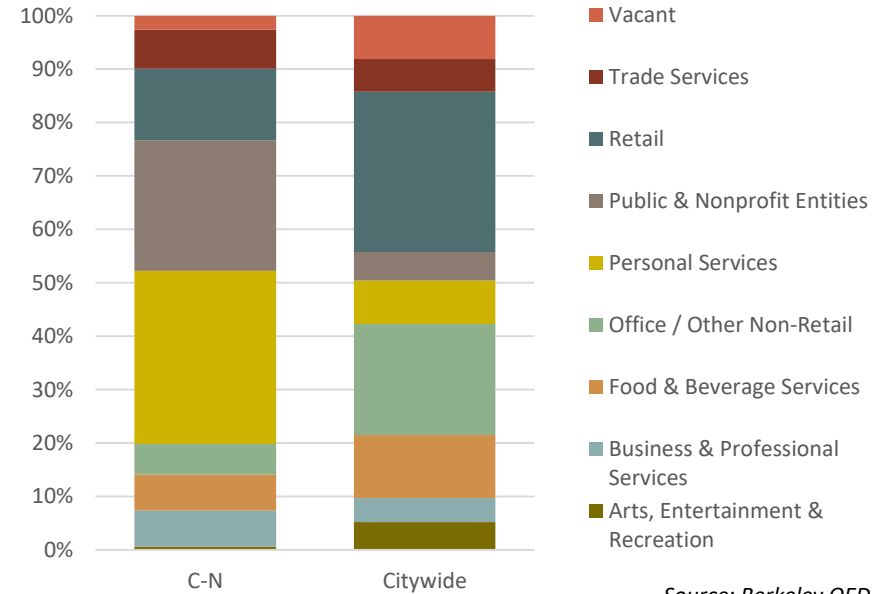
- Claremont and Prince
- Claremont and Tunnel
- College and Alcatraz
- Gilman and Curtis
- Hearst and Euclid
- Hopkins and El Dorado
- Hopkins and Monterey
- Martin Luther King Jr Way (MLK) and Dwight
- MLK and Hearst
- MLK and Rose
- MLK and Virginia

**Ground Floor Commercial Vacancy Rate (by Square Footage), 2020-2023**



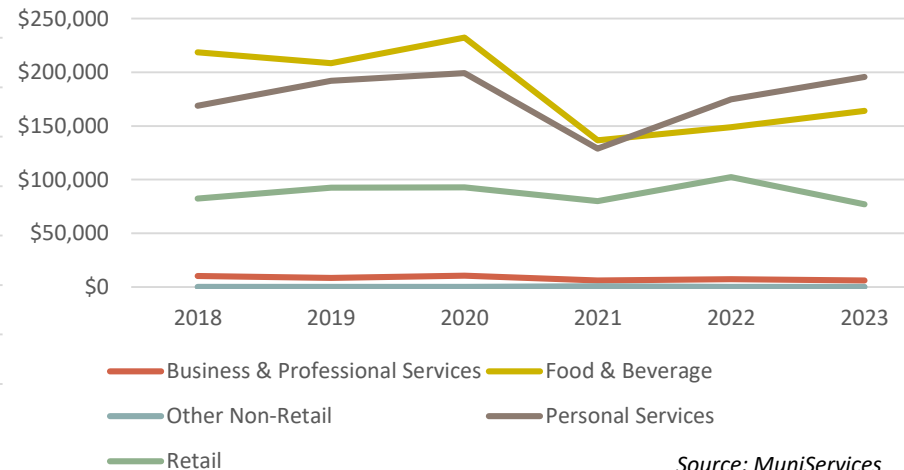
Source: Berkeley OED

**Business Mix (by Square Footage), 2023 Q4**



Source: Berkeley OED

**Sales Tax Revenue by Sector, 2018-2023**



Source: MuniServices