Research Brief: *Ten Things to Know About San Francisco's Economy and Employers*

A Publication to Inform
San Francisco's Workforce and Economic Development Community
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Executive Summary

This Research Brief was developed to provide members of San Francisco's business, workforce and economic development communities – and other interested members of the public – with a basic orientation to the size, structure, and historical evolution of San Francisco's economy. In doing so, this report also establishes a baseline for assessing how San Francisco's economy is likely to evolve in the future. While many of the specific numbers presented may have changed with the downturn of the past two years, the basic picture has not. This report should be updated periodically and complemented by research on how San Francisco's economy is changing over the short- and long-term.

INSIDE

Size and regional context

1. With approximately 600,000 jobs, 40,000 employers and a local GDP of about $75 billion, the City and County of San Francisco is an important component of the Bay Area regional economy.
2. Nearly half of San Francisco's workforce commutes in from surrounding communities while 20% of its employed residents commute out.
3. Over the last 30 years, San Francisco's employment has grown slower than surrounding Bay Area communities, even during the boom of the late 1990's, likely due to space constraints and the city's economic maturity.

Economic activities

4. The city's economy is particularly dependent on several external factors such as global tourism, the health of financial markets, business spending on IT, and overall government spending.
5. The city's employment is diversified across many industries, but is particularly concentrated in finance, insurance, real estate, business services and government administration.
6. The city's industrial structure has shifted considerably over the last 30 years with the exceptional growth of the city's service industry. During this time, government and finance employment has been flat, trade has grown steadily, and transportation, communications, utilities and construction have recently rebounded.
7. The city's occupational structure reflects its industrial distribution, with many high-wage professional and low-wage service jobs, but few moderately-paid blue-collar jobs.

Employer size

8. While most San Francisco employers are small, employment is spread fairly evenly across large, medium and small employers. The typical San Francisco worker is part of a 100-person firm.
9. The city's largest employers include government, educational and health organizations such as the City and County, UCSF, and the local school district and major corporate offices of Wells Fargo, AT&T, PG&E, and SBC, among others.

Spatial distribution

10. More than half of the city's employment is concentrated in the office-heavy Financial and SOMA districts. Other areas have fewer jobs and a resident-serving (non office) focus.

Research Briefs are prepared periodically to inform the workforce and economic development communities about various topics related to San Francisco's economy and labor market. This research is made possible through the generous financial support of the San Francisco Urban Institute at San Francisco State University, the Private Industry Council of San Francisco, and the San Francisco Department of Human Services.

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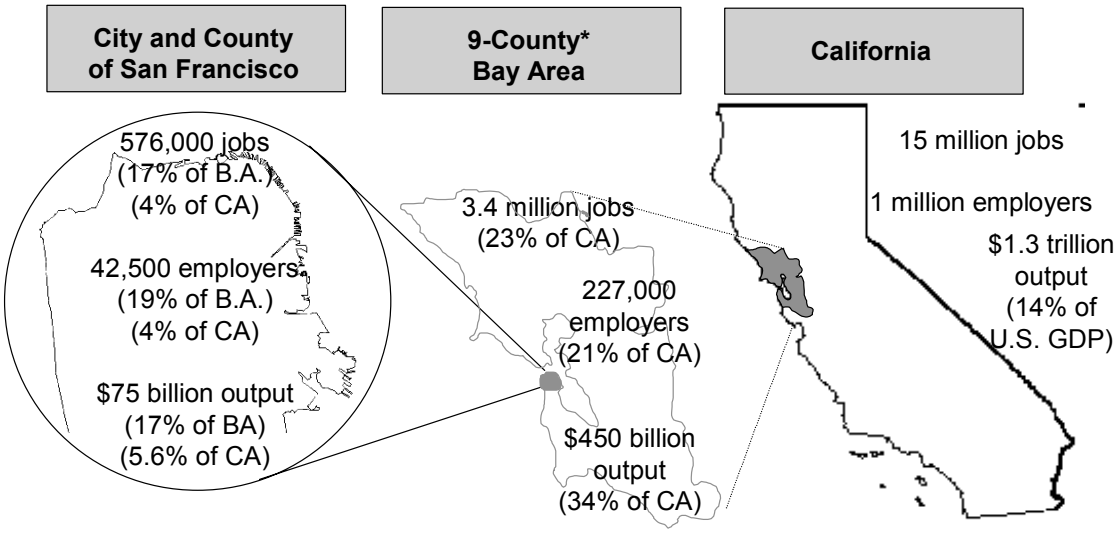
SIZE, REGIONAL CONTEXT, AND HISTORICAL GROWTH

1. With approximately 600,000 jobs, 40,000 employers, and a local GDP of about $75 billion, the City and County of San Francisco is an important component of the Bay Area regional economy.

FIGURE 1

Employment and Number of Employers,* 2001
Economic Output, 2000



* Excludes the self-employed, unpaid family workers, and select other classes of worker
** Includes Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma counties
SOURCE: California Employment Development Department, McKinsey & Company, US Bureau of Economic Analysis

While the exact number of jobs and employers in San Francisco's economy has fluctuated over the recent economic cycle, it is currently composed of approximately 600,0000 jobs and 40,000 employers. San Francisco accounts for slightly less than 20% of the 3.4 million jobs and 230,000 employers in the 9-county San Francisco Bay Area[1], and 4% of the 15 million jobs and 1 million employers in the state of California.[2]

The San Francisco Bay Area is also one of the most economically productive in the country. Research by McKinsey and Company on behalf of the Bay Area Economic Forum, the Bay Area Council, and the Association of Bay Area Governments estimates that San Francisco workers and businesses generated approximately $75 billion of economic output (GDP) in 2000, which represents about 17% and 5.6% of Bay Area and California economic output, respectively.

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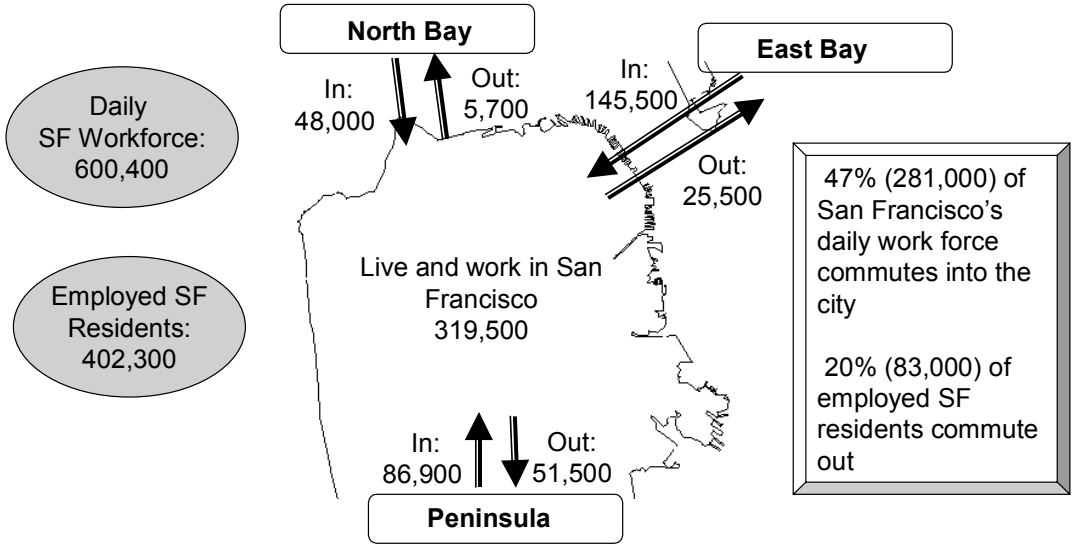
[1] Throughout this report, the City and County of San Francisco is compared with the 9-county San Francisco Bay Area region, which includes Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma counties.
[2] Estimates include a significant number of private household employers and workers, which are excluded from most of the analysis that follows. In San Francisco, there were 12,000 private households employing 9,000 individuals in 2001. The Bay Area had 42,000 employing 29,000 workers and California had 224,000 employing 170,000 workers.

2. San Francisco is highly integrated with this regional economy – nearly half of its workforce commutes in from surrounding communities while 20% of San Francisco's employed residents commute out.

FIGURE 2

Daily commuters to and from San Francisco
Number of workers, 2000

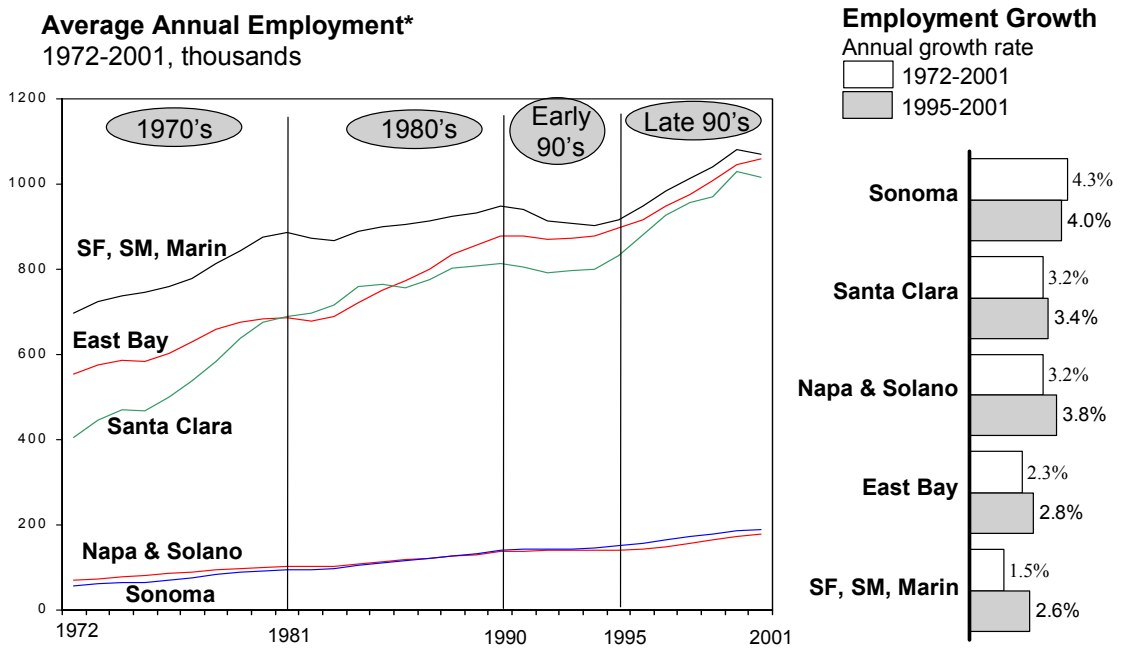


SOURCE: Metropolitan Transportation Commission

In at least one important way – having a shared labor force – the city of San Francisco is highly integrated with the surrounding Bay Area. Nearly half of San Francisco's workforce commutes into jobs from outside the city, while only slightly more than half of the city's workers actually live within the city limits. Nearly 150,000 workers commute daily from the East Bay alone – approximately one quarter of the city's 600,000-strong workforce. Reverse commuters – city residents that work outside of the city – account for 20% of the city's employed residents. Silicon Valley on the peninsula is the primary destination for San Francisco residents who work outside of the city, attracting more than 50,000 reverse commuters a day.

3. Over the last 30 years, San Francisco's employment has grown at a slower rate than surrounding Bay Area communities, even during the boom of the late 1990's. The city's constrained physical space and industrial maturity likely explain this slow growth.

FIGURE 3



*Jobs are classified by place of work, regardless of where the employee lives. Does not include agricultural workers, the self employed, unpaid family workers, and private household employees. Multiple job holders may be counted twice.
SOURCE: US Bureau of Labor Statistics Current Employment Statistics program

Over the last 30 years, San Francisco's economy has typically grown at a slower rate than surrounding Bay Area communities. High tech manufacturing fueled an explosion of employment in Santa Clara in the 1970s, while broad-based expansion in trade and services propelled East Bay growth in the 1980s. Together, the western counties of San Francisco, San Mateo, and Marin have not seen a comparable period of rapid employment growth in the last 30 years. As a result, total employment growth has averaged just 1.5% annually since 1972, the lowest rate (on a percentage basis) in the Bay Area. Even during the economic boom of the late 1990's, the 3 western counties grew just 2.6% annually, which was the slowest rate in the region.

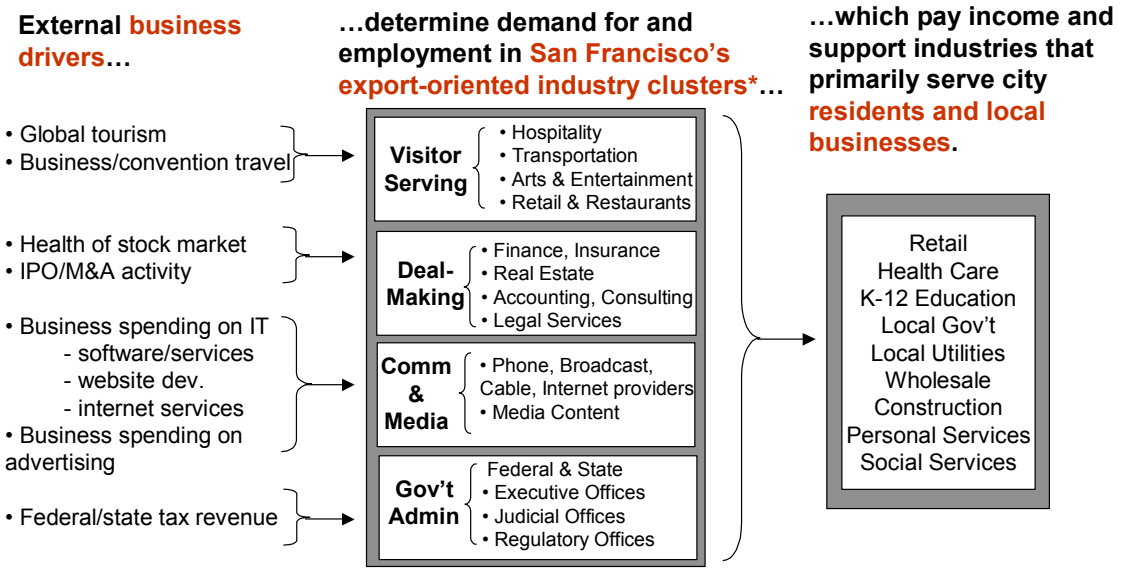
The city's slow growth is likely explained by San Francisco's constrained physical space and the maturity of its economy. With a mere 47 square miles, almost all of which is already developed, the city of San Francisco has significantly less physical room for business and housing expansion than surrounding communities. In addition, many of San Francisco's current major industries had already developed by 1970. This economic maturity makes rapid industrial transformation – and the rapid employment growth that often accompanies it – more difficult than in communities whose major industries have emerged more recently. It should be noted that lower-than-average growth does not necessarily mean increased overall employment stability – the recent doubling of the unemployment rate over the last two years has demonstrated that San Francisco is just as susceptible to an economic decline as anywhere else.

ECONOMIC ACTIVITIES: INDUSTRIES AND OCCUPATIONS

4. San Francisco's economy is dependent on external factors such as global tourism, the health of financial markets, business spending on information technology, and overall government spending. The city's visitor services, corporate deal-making, communications/media, and government administration industries, which chiefly fuel local employment growth, are especially susceptible to these factors.

FIGURE 4

Drivers of San Francisco's Economy



* Many industries, retail for example, sell goods or services to both residents and non-residents and thus are both export and resident-serving industries.
SOURCE: Sims, Kent 2000. "San Francisco Economy:Implications for Public Policy," San Francisco Planning and Urban Research Association (SPUR) and the San Francisco Center for Economic Development.

San Francisco, like any local economy, is highly dependent on what goes on in the national and state economies. Factors such as global tourism and business travel, the health of financial markets, business spending on information technology and advertising, and federal and state government spending are all determined outside of San Francisco, but have an enormous impact on the local economy. These factors determine demand for, and employment in San Francisco's export-oriented clusters of industries: visitor services, corporate deal-making (finance, insurance, real estate, accounting, consulting, and legal services), communications and media content, and government administration.

Export-oriented industry clusters can be identified by their cross-industry dependence and their customers –primarily businesses and consumers who operate or live outside of the city. Tourism provides a simple example of what is meant by an export industry cluster. A tourist may visit San Francisco because of its collection of high-caliber performing arts venues, shopping and dining options, and luxurious hotels. During her stay, she will likely be served by all of these industries and the regional transportation (air, taxi, bus) system. The health of these industries, which collectively constitute the "Visitor Serving" cluster, rests on at least one common factor (global tourism) and their ability to collectively fill the existing demand for it. If one component fails (for

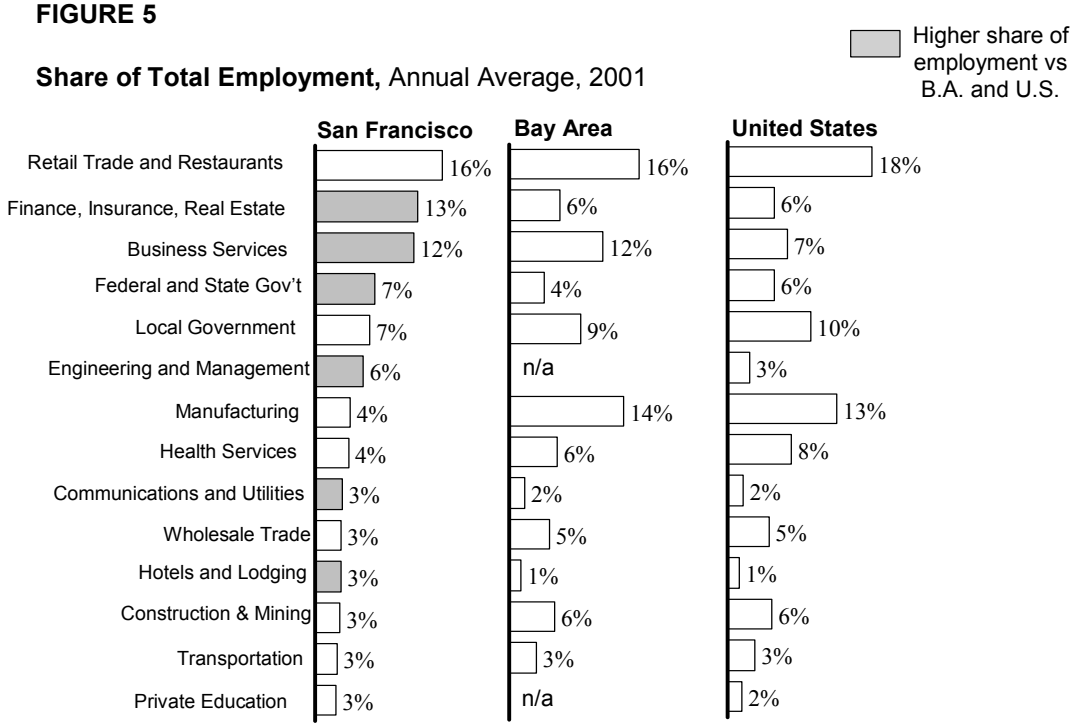
example, the performance arts venues were no longer a draw or airport congestion deterred travelers), the entire cluster suffers. San Francisco's collection of legal, investment banking, and consulting services firms are similarily dependent on corporate deal-making such as mergers and acquisition activity.

In addition to their large direct effects on the local economy – hiring local residents and purchasing from local businesses – export industries indirectly support the rest of the economy by paying income that residents use to purchase health care, elementary education, and local government. This indirect effect on employment is often referred to as the "multiplier effect." Because of the large "multiplier effect" of export industries, local employment is particularly dependent on the aforementioned external business factors. It should be noted that the relevant export industry clusters and business factors are different for every local economy. To take one example, Silicon Valley is particularly dependent on the global demand for the technology hardware that is manufactured there (e.g. telecommunications equipment), while the global demand for technology services – not hardware – is more important to San Francisco's economy.

5. Though San Francisco's economy is diversified across many industries, its is particularly concentrated in industries that comprise its export clusters such as finance, insurance, real estate, business services, and government administration.

FIGURE 5

Share of Total Employment, Annual Average, 2001



* Smaller categories include social services, amusement services, auto repair, motion pictures, personal services, legal services, museums, membership organizations, and agricultural services
SOURCE: US Bureau of Labor Statistics Current Employment Statistics program

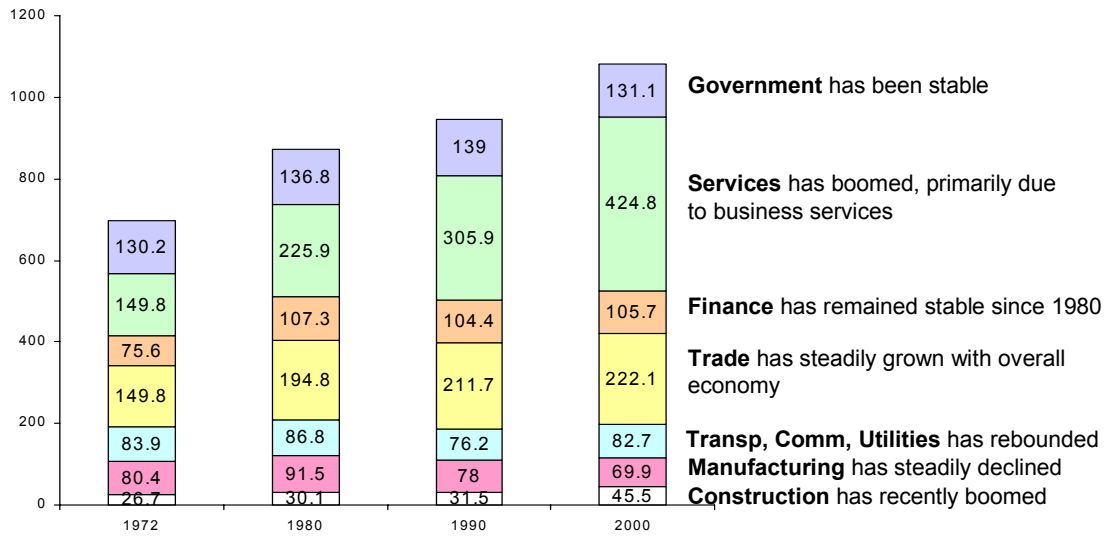
Similar to the Bay Area and US economies overall, San Francisco businesses span all major industries – from health care to manufacturing – with retail and restaurants having the greatest share of employment. However, San Francisco is particularly concentrated in industries that comprise its export industry clusters. Finance, insurance, and real estate, for instance, represents 13% of employment in San Francisco, more than double its share in the Bay Area and US overall. Business services (which includes software, IT and personnel services), Federal and State government, engineering and management services, communications and utilities, and hotels are each a component of one of San Francisco's major export industry clusters and all constitute a greater share of employment in San Francisco than outside it. Industrial activities such as manufacturing, construction/mining, and wholesale trade (distribution/warehousing) are relatively less significant in generating employment in San Francisco.

NOTE: This analysis relies on the Standard Industrial Classification system for classifying establishments by industry. As of February 28, 2003, all data will be published using the North American Industrial Classification System (NAICS) for classifying establishments by industry, which is believed to more accurately characterize service industries. The primary changes include the formation of a distinct "Information" industry and the inclusion of restaurants with hotels and entertainment into a "Leisure and Hospitality" industry. This analysis will be redone and this report revised based on these changes when the data becomes available.

6. San Francisco's industrial structure has shifted considerably over the last 30 years with the exceptional growth of the city's service industry. Government and finance employment have both been relatively flat for several decades, while trade has grown steadily with the overall economy. Transportation, communications, utilities, and construction have recently rebounded, while manufacturing continues to decline.

FIGURE 6

Average Annual Employment*
San Francisco, San Mateo, Marin Counties, thousands



*Does not include agricultural workers, the self employed, unpaid family workers, and private household employees. Multiple job holders may be counted twice.
SOURCE: US Bureau of Labor Statistics Current Employment Statistics program

Over the last 30 years, the city's industrial structure has shifted considerably. The services industry, fueled largely by business services, has added 275,000 jobs to the three western counties since 1972 – more than all other industries combined. The finance industry has been relatively stable since adding more than 25,000 jobs in the 1970s, while government employment continues to fluctuate around 135,000 total jobs. Trade has steadily grown with the overall economy, adding nearly 75,000 jobs since 1972. Transportation, communication, utilities and construction saw strong growth in the 1990s, adding 6,000 and 14,000 jobs, respectively, while manufacturing continued its slow decline, losing 11,000 jobs since 1972.[3]

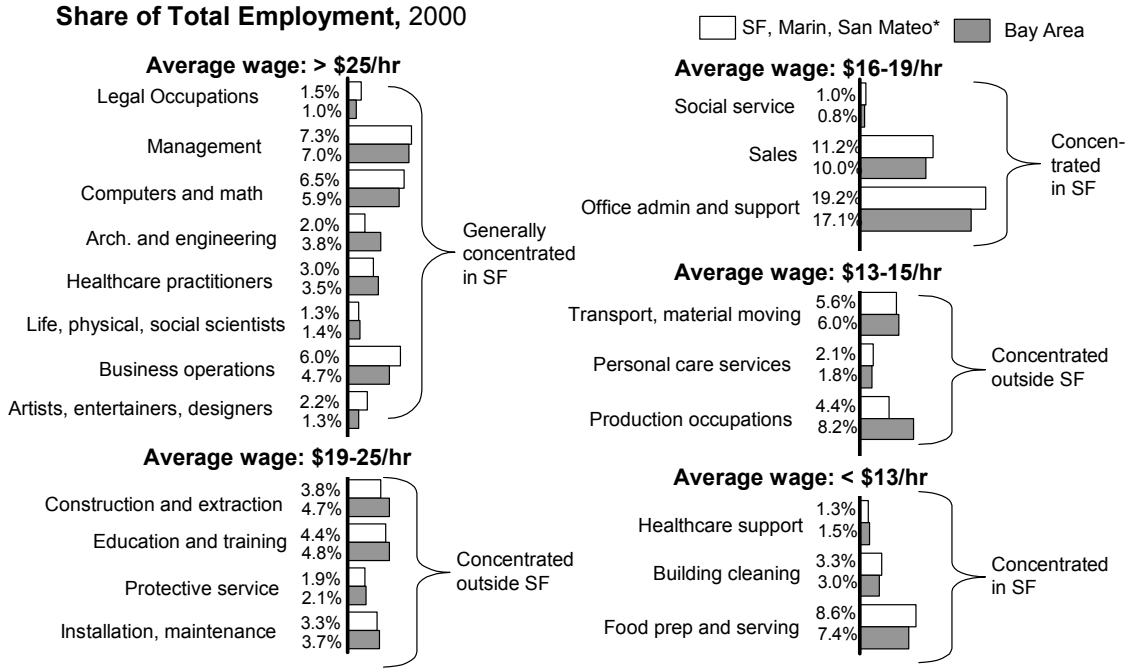
The business services boom largely reflects the emergence of the software and IT services industry and increased corporate outsourcing to staffing/personnel agencies – the two largest contributors to that sector's phenomenal growth.

[3] This analysis examines long-term trends in employment by broad industry group and does not attempt to illuminate short-term fluctuations. At the time of this report, the Finance, Business Services, Communication, Construction, and Transportation industries had recently shed significant employment. Further research should ascertain whether these recent events represent new downward trends or simply short-term fluctuation around existing historical trends.

7. San Francisco's occupational structure reflects its industrial distribution, with many high-wage professional and low-wage service jobs, but relatively fewer moderately-paid blue-collar jobs than the rest of the Bay Area.

FIGURE 7

Share of Total Employment, 2000



*Occupation data not available at county level
Note: Occupational categories are listed in descending order from highest to lowest average wage.
SOURCE: US Bureau of Labor Statistics Occupational Employment Statistics Survey

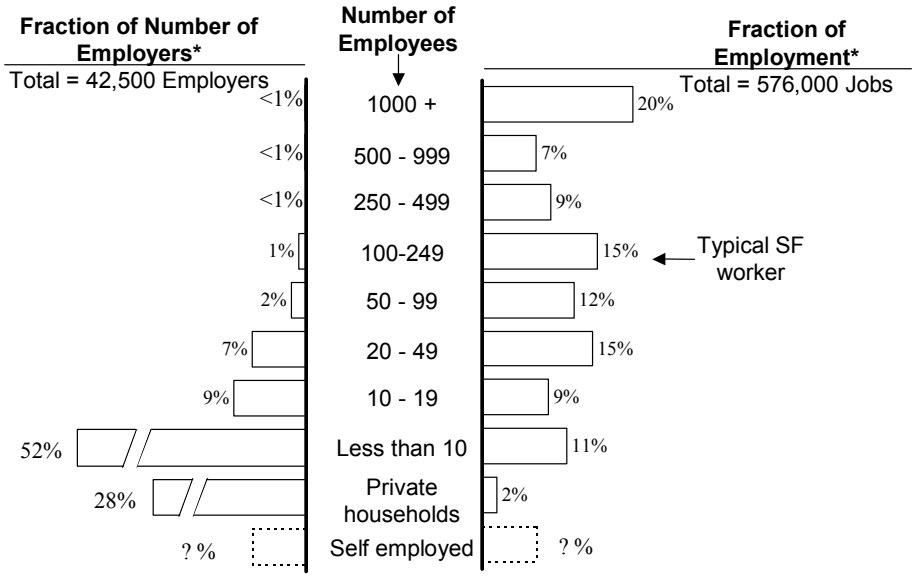
The city's occupational structure is a result of its industrial distribution. As the home of many corporate headquarters, business service firms, and financial institutions, San Francisco employs relatively more highly paid lawyers, managers, computer scientists, and business operations professionals than the Bay Area overall. These same industries also require a sizeable workforce of moderately paid sales and office support professionals. In contrast, a lack of industrial activity in San Francisco requires fewer blue-collar workers – construction, installation, maintenance, and production workers are all less concentrated in San Francisco than throughout the Bay Area. Lastly, San Francisco's abundance of office buildings, hotels and restaurants rely on a large pool of building cleaners and food service workers – very low wage service jobs that are also relatively more numerous in the city.

EMPLOYER SIZE

8. While most San Francisco employers are small, employment is spread fairly evenly across large, medium, and small employers. The typical San Francisco worker is part of a 100-person firm.

FIGURE 8

Share of Employment by Employer Size
San Francisco County, 2001



* Totals and share do not include the self-employed and unpaid family workers
SOURCE: California Employment Development Department, Size of Business report

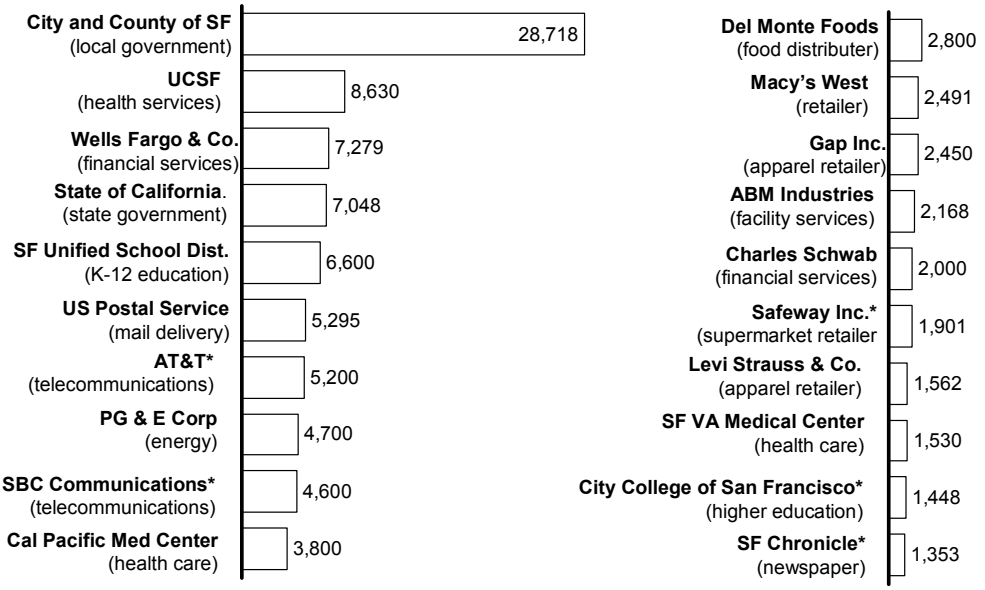
From the local corner grocer to the headquarters of a multinational corporation, San Francisco's employers are as varied in size as they are in industry. About fifty employers are very large with 1000 or more employees, while more than 30,000 – 80% of the total – employ fewer than 10 people. While most employers are very small, employment is spread fairly evenly across large, medium, and small ones and the typical (median) San Francisco worker is part of a 100-person organization. About 1% of San Francisco employers are large with at least 250 employees, and employ about 36% of the workforce. About 3% are medium-sized (50-250 employees), accounting for about 27% of the workforce. Ninety-six percent of employers are small with fewer than 50 employees, hiring 36% of the city's workforce.

Many of San Francisco's smallest employers are private households who hire individuals to do work around the house – housekeeping and gardening work, for instance. However, these type of arrangements do not account for a significant share of the city's employment. The number of self-employed individuals and unpaid family workers are notoriously difficult to measure regularly and are not included in these estimates. However, the 2000 Census found that 37,000 San Francisco residents were self employed and 1,000 worked for no pay in a family business in 2000.

9. San Francisco's largest employers span a wide range of industries. Government, educational and health organizations such as the City and County, UCSF, the State of California, and the local school district and corporate offices of Wells Fargo, AT&T, PG&E, and SBC are among the city's largest employers.

FIGURE 9

Number of Full-Time Employees in San Francisco County, 2002



NOTE: Rank is determined by full time employees working in the county of San Francisco. The US Federal Government, Bank of America, and McKesson Corp. did not respond to survey, but are also major San Francisco employers. An "*" indicates figures reflects 2001 survey response.
SOURCE: San Francisco Business Times

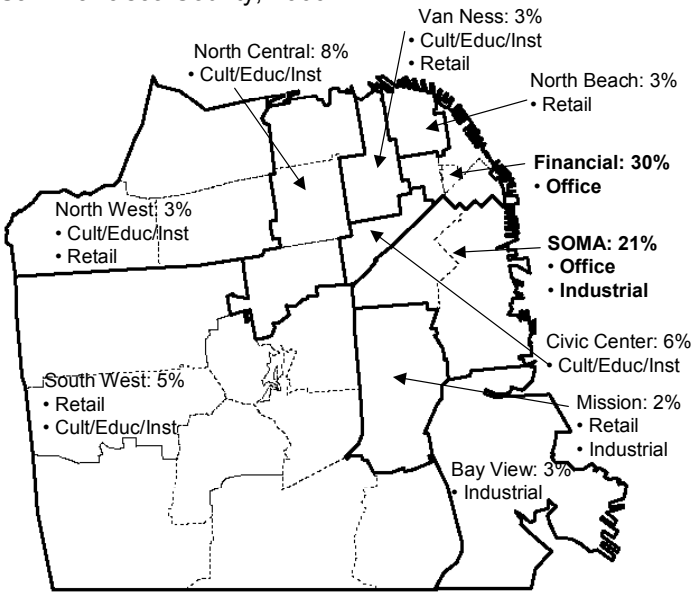
As is typical in most local economies, many of San Francisco's largest employers are government, educational, and health institutions. In fact, four of the city's five largest employers – local government, the University of California San Francisco (UCSF), the State of California, and the city's local school system fall into these categories. Local government alone directly employs nearly 30,000 workers. What distinguishes San Francisco from other locales, however, is the number of corporate headquarters or major regional offices that are among the city's major employers. Wells Fargo, AT&T, PG&E, and SBC all maintain large corporate staff at their offices within the city.

SPATIAL DISTRIBUTION

10. More than half of San Francisco's employment is concentrated in the office-heavy Financial and SOMA districts. Other areas have relatively less economic activity and employment is more concentrated in resident-serving retail and cultural/educational/health organizations. Most industrial activity is concentrated in the city's eastern neighborhoods.

FIGURE 10

Fraction of San Francisco Employment by Business District and Land Use
San Francisco County, 2000



Primary Business Land Uses*	Share of Total SF Employment
Office	37%
Cultural/Educ/Inst**	23%
Industrial	20%
Retail	17%
Hotel	3%

Commerce and Industry District Boundaries
ZIP Code Boundaries

* Each district's primary business land uses (at least one quarter of a district's employment) are identified on the map
** Includes schools, hospitals, clinics, social service facilities, museums, movie theaters, and other recreational facilities
Note: 16% of employment was not classifiable by location (see end note)
SOURCE: San Francisco Planning Department, "Commerce and Industry Inventory 2001"

The level and type of economic activity in San Francisco varies considerably between its neighborhoods. Because of its office space density, the Financial and SOMA districts in the Northeast section of the city account for more than half of the city's employment. The other neighborhoods, where the vast majority of residents live, have relatively little economic activity and most employment occurs in retail stores, schools, hospitals and other resident-serving functions. For instance, the Stonestown mall and the main campuses of San Francisco State University and City College are major employers in the Southwest district, while several hospitals and UCSF are anchor employers in the Northcentral region (Western Addition, Haight). Most industrial activity is located in the city's eastern neighborhoods: the Bay View, Mission, and SOMA.

Conclusions and Recommendations

This report provided a basic orientation to the size, structure, and historical evolution of San Francisco's economy and employer base and established a baseline for assessing how this base is changing.

It is expected that readers of this report will be quite diverse – from economic policy-makers to training providers and business leaders to tax collectors. Because of this diversity of audience, this report has purposely avoided identifying specific implications of this research for the reader – implications that will vary dramatically depending on the reader's vantage point. Following the report's release, Workforce Investment San Francisco will articulate implications of this work for several of the primary groups of likely readers. These will be made available at www.picsf.org.

Despite this diversity, there are several implications of the economic picture presented herein that are likely to be relevant to most readers.

1. **Importance of regionalism**. San Francisco is far from a closed economy. San Francisco employers tap the entire Bay Area for their workforce and many residents work outside the city. A regional approach to economic and workforce development is essential to its effectiveness.
2. **Focus on primary economic drivers**. While employment spans all industries, San Francisco's economy is driven largely by a handful of external factors such as tourism and the health of financial markets. These factors have a huge impact (directly and indirectly) on the level and nature of employment in all industries, and thus should be watched closely.
3. **Importance of internal growth**. With less room for physical expansion than surrounding areas, the city of San Francisco must rely on growing and retaining existing businesses and utilizing existing office capacity to fuel its growth, while abandoned land is slowly converted to more modern uses.
4. **Recognize employer diversity**. Organizations of all sizes, industries, and ownership structures (for-profit, government, non-profit) represent a significant share of employment in San Francisco. A comprehensive economic and workforce development plan should respond to this diversity.

This picture should be updated periodically and complemented by research on how San Francisco's economy – and that of Bay Area region overall – is changing in the short- and long-term. Several of the most useful sources for such information are profiled at the end of this report.

* * * * *

San Francisco, as the center point of a dynamic and diverse regional economy, continues to undergo significant transformation. The completion of the Mission Bay development, the expansion of public transit infrastructure along 3rd Street and to San Francisco International Airport, a new Ferry Building and Convention Center, the conversion of the Presidio to private uses – all will significantly alter the face of San Francisco's economy and labor market. This report has established a baseline against which these changes can be measured.

END NOTES DATA SOURCES USED

Figure 1
Employment and number of employers by county and for the state were obtained from the California Employment Development Department's (EDD) "Size of Business" report (see next chapter). Special tabulations were performed by EDD in order to estimate the number of private household employers (private individuals who hire other individuals to clean their house or tend their garden, for instance), which are typically counted as businesses in this report. Gross Output by county was obtained by special request to the McKinsey & Company team that authored the report *After the Bubble: Sustaining Economic Prosperity*, published by the Bay Area Economic Forum in January 2002. This report, which contains a detailed description of their methodology, is available at http://www.bayeconfor.org. Gross output (GDP) for the state of California and the U.S. overall are available form the U.S. Bureau of Economic Analysis (www.bea.gov).

Figure 2
County-to-county commute patterns in the San Francisco Bay Area were obtained from the Metropolitan Transportation Commission at http://www.mtc.ca.gov/datamart/stats.htm. Values represent average daily commuters for a typical weekday, including those working at home or traveling to work by any means of transportation. Estimates are based on the Association of Bay Area Government's Projections 2000 data and 1990 Census journey-to-work data. Commute patterns will be updated next in late 2003, when county-to-county journey-to-work data is made available from Census 2000. "North Bay" includes all commuters from Marin, Sonoma, and Mendocino counties; "Penninsula" includes all those from San Mateo, Santa Clara, Santa Cruz, Monterey, and San Benito counties; and "East Bay" includes all commuters from Alameda, Contra Costa, Solano, Sacramento, Napa and other surrounding counties.

Figure 3
Average annual employment (total and by industry) by Metropolitan Statistical Area (1972-2001) was obtained from the U.S. Bureau of Labor Statistics Current Employment Statistics Program.. Since data is derived from survey and payroll information from employers (see next chapter), jobs are classified by place of work, regardless of where the employee lives. Additionally, this estimate does not include agricultural workers, the self employed, unpaid family workers, and private household employees, while multiple job holders may be counted twice. Analysis was performed at the MSA level in order to examine long-term trends: data is not available for SF County specifically prior to 1988. Prior to 1972, Oakland MSA (the "East Bay") was included with SF MSA.

Figure 4
Many of the ideas presented here were drawn from Kent Sims' report "San Francisco Economy: Implications for Public Policy," prepared for the San Francisco Planning and Urban Research Association, July 10, 2000, and through discussions with the San Francisco Center for Economic Development. Sims' report is available at www.spur.org.

Figure 5
Average annual employment (total and by industry) for the 9 Bay Area counties and for the U.S. overall was obtained from the U.S. Bureau of Labor Statistics Current Employment Statistics Program. Since data is derived from survey and payroll information from employers (see next chapter), jobs are classified by place of work, regardless of where the employee lives. Additionally, this estimate does not include agricultural workers, the self employed, unpaid family workers, and private household employees, while multiple job holders may be counted twice. Estimates of employment in engineering and management and private educational services were not available for Napa, Sonoma, and Solano counties, and were thus not available for the Bay Area. With 2.4% of employment in San Francisco, amusement services is the largest industry that

is not displayed – employment estimates for this industry are not available for most other counties.

Figure 6
See notes for Figure 3.

Figure 7
Annual employment and average wage by occupation for the 5 Bay Area Metropolitan Statistical Areas (MSA), California, and the U.S. was obtained from the U.S. Bureau of Labor Statistics Occupational Employment Statistics Survey program. Though wages are not shown in the chart, occupational categories are listed in descending order by average wage. Lawyers and other legal professionals earned the most in San Francisco, at $42 per hour, while food preparation and other food service workers earned the least at $9.66 per hour. Occupational comparisons between San Francisco and California or the U.S. yield similar conclusions as comparisons between San Francisco and the rest of the Bay Area.

Figure 8
Employment and number of employers for San Francisco County were obtained from the California Employment Development Department's (EDD) "Size of Business" report (see next chapter). Special tabulations were performed by EDD in order to estimate the number of private household employers (private individuals who hire other individuals to clean their house or tend their garden, for instance), which are not typically separated out from more traditional employers (e.g. private firms and government entities). These private household employers overwhelmingly fall into the "less than 10" size category.

Figure 9
Names, business description, and number of SF-based employees of San Francisco County's largest employers were obtained from San Francisco Business Times (January 17, 2003; page 24). San Francisco Business Times collects the data through surveys of major San Francisco employers and ranks organizations based on number of full time employees at the time of the survey. Some organizations (City College of San Francisco, for instance) may have many part-time workers which are not included in this analsyis.

Figure 10
Employment by business district and land use was obtained from Chapter 3 of the San Francisco Planning Department's 2001 Commerce and Industry Inventory report. The Planning Department obtains raw employment data for each establishment in San Francisco from the Employment Development Department (EDD) and categorizes these establishments by commerce district and primary land use (as defined by the Planning Department). Unfortunately, the physical location of many establishments (representing 16% of employment) could not be determined, and were thus not assigned to any specific commerce district. As a result, the employment shares shown in the figure do not add to 100%. However, the fact that the land use of these unclassified establishments mirrors that of the city overall suggests that they may be distributed across the city in proportion to classifiable employment.

SOURCES OF LABOR MARKET INFORMATION

The primary sources for local and regional economic and labor market data are profiled below, most of which are made available by the California Economic Development Department (EDD) and the U.S. Bureau of Labor Statistics (BLS). Additionally, many other organizations make information on specific topics available to the public, several of which were used in this report. The Metropolitan Transportation Commission, Association of Bay Area Governments, SF Planning Department, the San Francisco Businesses Times all collect and disseminate very useful information about San Francisco's economy and employers.

Labor force and unemployment

Data items: Number of people in labor force, number employed, number unemployed, unemployment rate overall and by demographic and other characteristics.
Sources of data: Monthly survey of individuals, the Current Population Survey.
Coverage: All non-institutionalized civilians. All U.S. and state data is seasonally adjusted, county is not.
Geographic scope: U.S., states, counties, some subcounties. Some detail only available for U.S. and states.
Timing: Monthly
To access: California and counties: EDD (http://www.calmis.ca.gov/htmlfile/subject/lftable.htm)
U.S. and other states: BLS (http://www.bls.gov/cps/)

Size of Business Report

Data items: Employment, payroll, establishment count by size and broad industry category.
Source of data: Employers' quarterly payroll records submitted to the State of California.
Coverage: Any employer and employee subject to the California Unemployment Insurance code. Excluded workers include: the self-employed, private household workers making less than $1,000 in the quarter, unpaid family workers, illegal aliens, public/non-profit school employees between academic terms or during vacation or holidays, and interstate railroad employees. Excluded establishments (employers) include businesses with no employees that are covered (as determined by above). Companies that operate more than one establishment are counted separately for each individual establishment
Geographic scope: California and California counties. Industry cross-tabulation available at MSA level.
Timing: Released annually, only covers the 3rd Quarter of each year.
To access: EDD (http://www.calmis.ca.gov/htmlfile/subject/indsize.htm)

Current Employment Statistics program (Industry Employment)

Data items: Employment by detailed industry category.
Sources of data: Monthly survey of employers, benchmarked annually to employers' quarterly payroll records submitted to the State of California.
Coverage: All wage and salary workers. Excluded workers include: the self-employed, private household workers, unpaid family workers, illegal aliens, public/non-profit school employees between academic terms or during vacation or holidays, and interstate railroad employees. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S., state, MSA, and counties.
Timing: Released monthly at the MSA level and above, monthly county data is available only after the annual benchmark, which has a one year lag (e.g. 2001 county-level data is available currently)
To access: California (MSA, counties): EDD (http://www.calmis.ca.gov/htmlfile/subject/indtable.htm)
U.S. (and non-California areas): BLS (http://www.bls.gov/ces/)

Occupational Employment Statistics program (Occupational Employment)

Data items: Employment and wage range (mean, median, percentiles) by detailed occupational category.
Sources of data: Yearly mail survey of employers, drawn from the universe of employers' quarterly payroll records submitted to the State of California.
Coverage: All wage and salary workers in non-farm industries, both full and part time. Excluded workers include the self-employed, private household workers, and unpaid family workers.
Geographic scope: U.S., state, and MSA
Timing: Released annually. Employment levels have a one year lag, but wages are for most recent year (e.g. employment by occupation is currently available for 2001, wages by occupation are for 2002)
To access: California (MSAs): EDD (http://www.calmis.ca.gov/file/occup$/oes$.htm)
U.S. (and non-California areas): BLS (http://www.bls.gov/oes/)

Occupational Staffing Patterns (major occupations in an industry)
Data items: Distribution of employment for a specific occupation among industries and occupational employment distribution for a specific industry, current and ten-year forecast.
Sources of data: Yearly mail survey of employers about their occupations (see OES program, above) generates the current year distribution of occupations by industry (the Industry-Occupation staffing matrix). Staffing projections are made in conjunction with overall industry and occupational projections (see below).
Coverage: All wage and salary workers in non-farm industries, both part and full time. Estimates at the state level exclude the self-employed, all private household workers, and unpaid family workers. These workers are included, but listed as separate industries at the national level. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S. and states
Timing: Revised every two years to incorporate recent economic changes. The next update (covering 2002-2012) will be released near the end of 2003.
To access: California: EDD (http://www.calmis.ca.gov/file/IOMatrix/Staffing-Patterns1.htm)
U.S. and other states: BLS (http://data.bls.gov/oep/nioem/empiohm.jsp)

Industry Projections
Data items: Ten and seven year forecasts (for counties and California, respectively) of employment levels and growth rates by detailed industry category.
Sources of data: Historical and current employment by industry from the Current Employment Statistics program (see above) is projected forward using a complex methodology to account for shifts in population, labor force, aggregate economic conditions, final economic demand, and production methods in each industry. (See BLS website for more detail)
Coverage: All wage and salary workers in non-farm industries, both part and full time. Estimates at the state and county level exclude the self-employed, all private household workers, and unpaid family workers. These workers are included, but listed as separate industries at the national level. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S., state, and county.
Timing: Revised every two years to incorporate recent economic changes. Projections from 1999 to 2006 are currently available for California counties, as are projections from 2000 to 2010 for California overall.
To access: California and counties: EDD (**http://www.calmis.ca.gov/htmlfile/subject/indproj.htm**)
U.S. and other states: BLS (http://www.bls.gov/emp/)

Occupational Projections
Data items: Ten and seven year forecasts (for counties and California, respectively) of employment levels, job openings, growth rates, and training requirements by detailed occupational category.
Sources of data: Projected occupational staffing patterns are applied to employment projections by industry to generate occupational projections (see above).
Coverage: All wage and salary workers in non-farm industries, both part and full time. Estimates at the state and county level exclude the self-employed, all private household workers, and unpaid family workers. These workers are included, but listed as separate industries at the national level. Jobs are classified by place of work, regardless of where the employee lives. Multiple jobs held by the same person are counted separately.
Geographic scope: U.S., state, and county.
Timing: Revised every two years to incorporate recent economic changes. Projections from 1999 to 2006 are currently available for California counties, as are projections from 2000 to 2010 for California overall.
To access: California and counties: EDD (http://www.calmis.ca.gov/htmlfile/subject/occproj.htm)
U.S. and other states: BLS (http://www.bls.gov/emp/)

SF Prospector
Data items: Various business, workforce, real estate, demographic, planning, and geographic information and data by very detailed location (ZIP code, Supervisor district, neighborhood).
Sources of data: many sources
Coverage: Individuals and businesses living, working, or operating in San Francisco, depending on specific data item.
Geographic scope: San Francisco only
Timing: Updated periodically.
To access: www.sfprospector.com