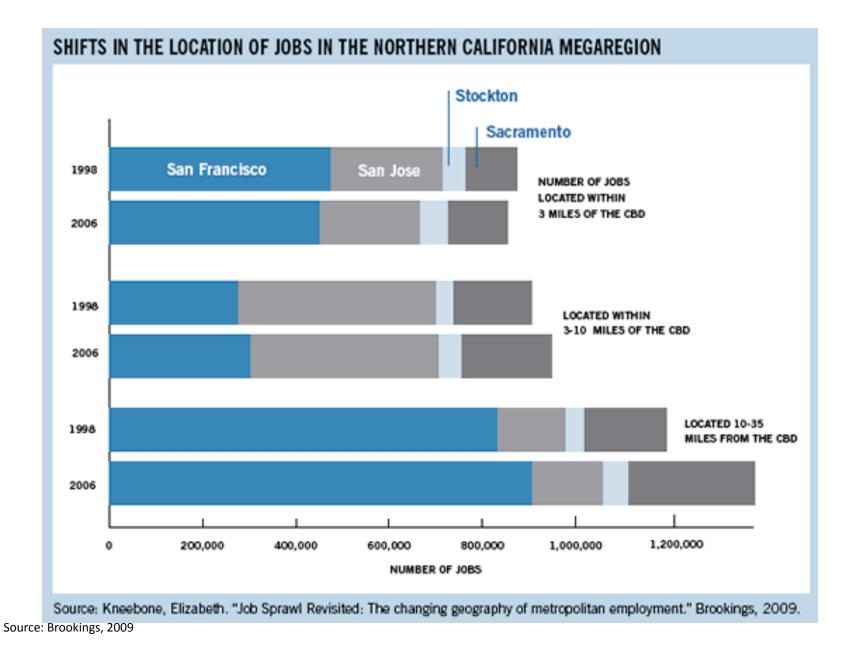
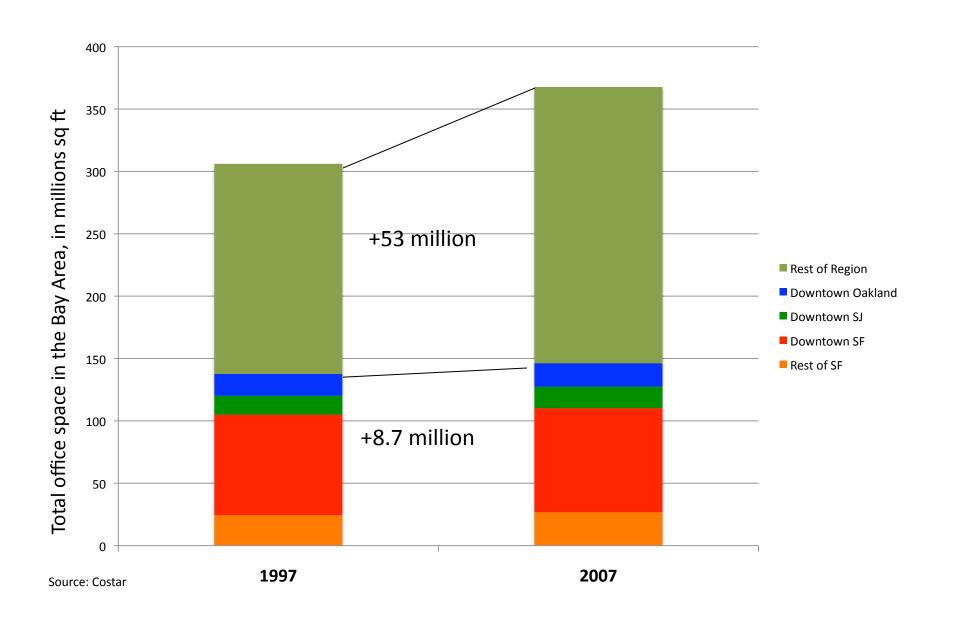
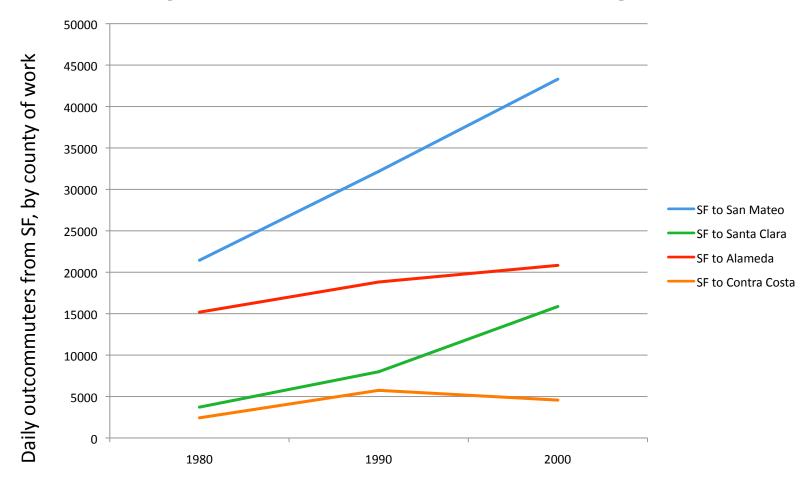
Job sprawl is increasing



Trend #2: Most new office space is in the suburbs, not in transit served downtowns

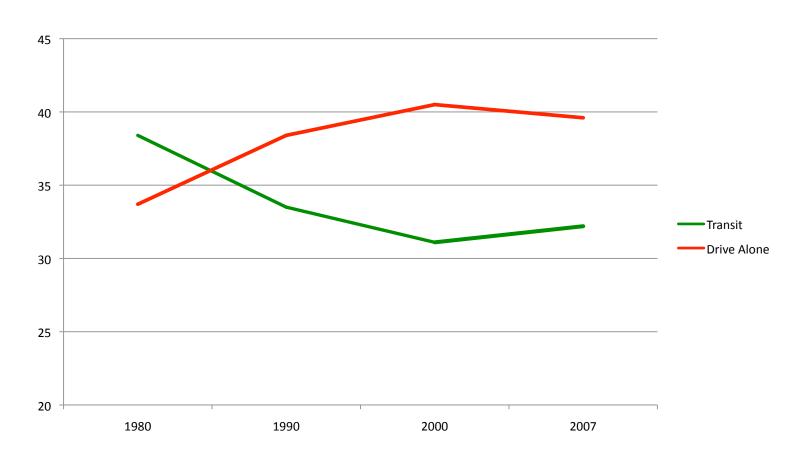


More San Francisco residents are now leaving the city for work in the East Bay or South Bay

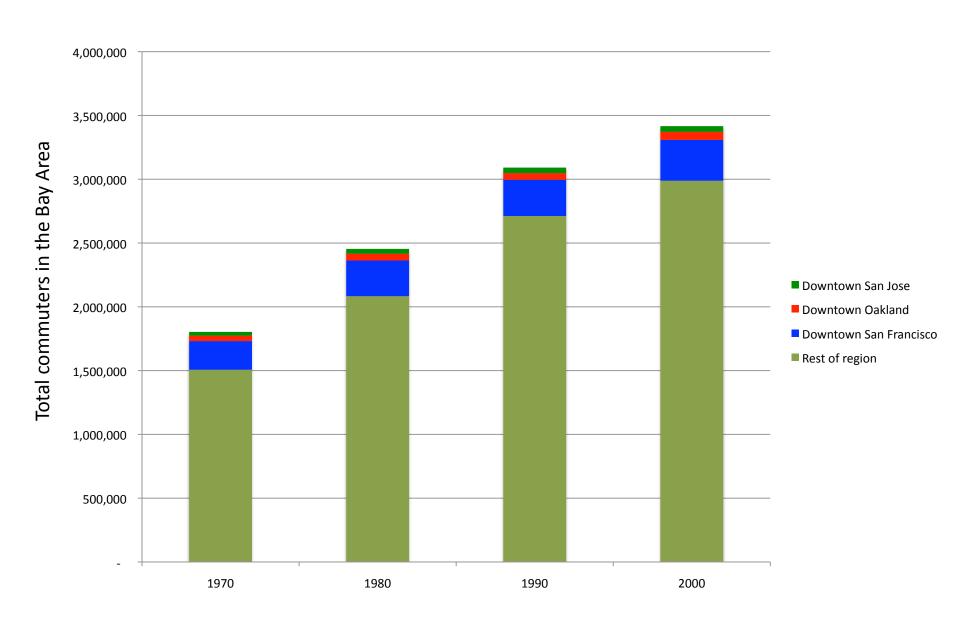


Over this period, the number of SF residents working in SF grew by only 13 percent while outcommuting to these four counties increased by 100 percent.

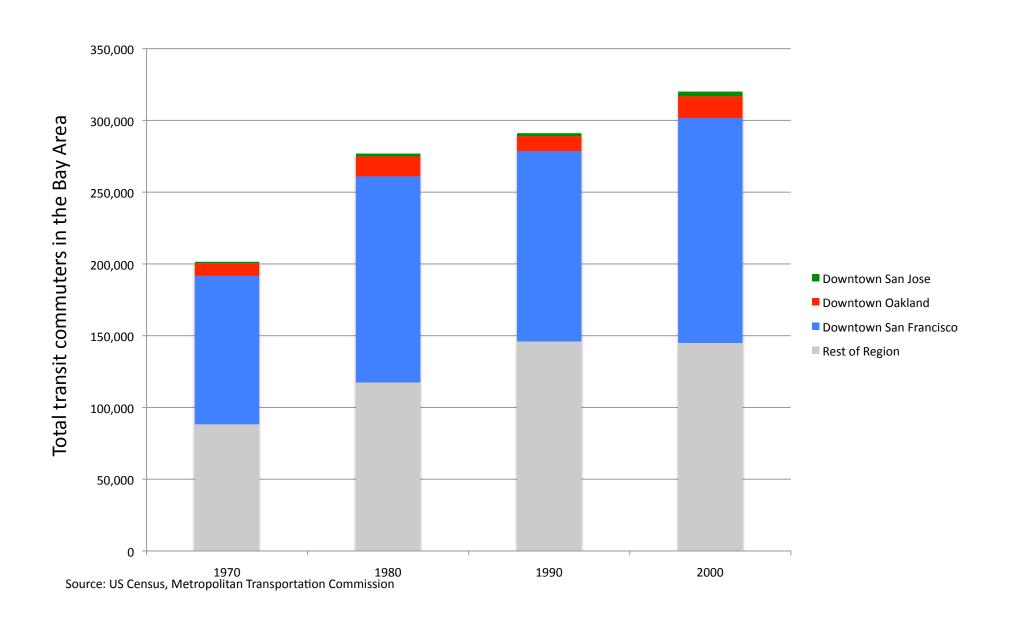
And because the decision to take transit is based more on where one works, not where one lives, fewer San Franciscans are taking transit to their job

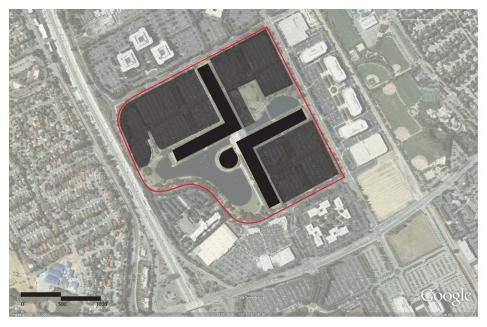


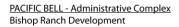
Traditional downtowns are a declining share of overall jobs



But transit ridership to work is mostly to traditional downtowns

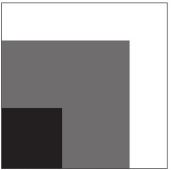






Building Area: 2 million square feet Site Area: 100 acres Parking: 4,500 surface parking spaces





Percentage of 100 acre square filled by building and parking footprint







50 FREMONT STREET Downtown San Francisco

Building Area: 740,000 square feet Site Area: 1.14 acres Parking: below grade parking

425 MARKET STREET Downtown San Francisco

Building Area: 960,000 square feet Site Area: 1.08 acre Parking: below grade parking





Suburban TOD: Walnut Creek



Transit adjacent: Hacienda Business Park

BART to businesses: 0.1 to 2 miles



Transit adjacent: Oyster Point

Caltrain to Genentech: 1.9 miles



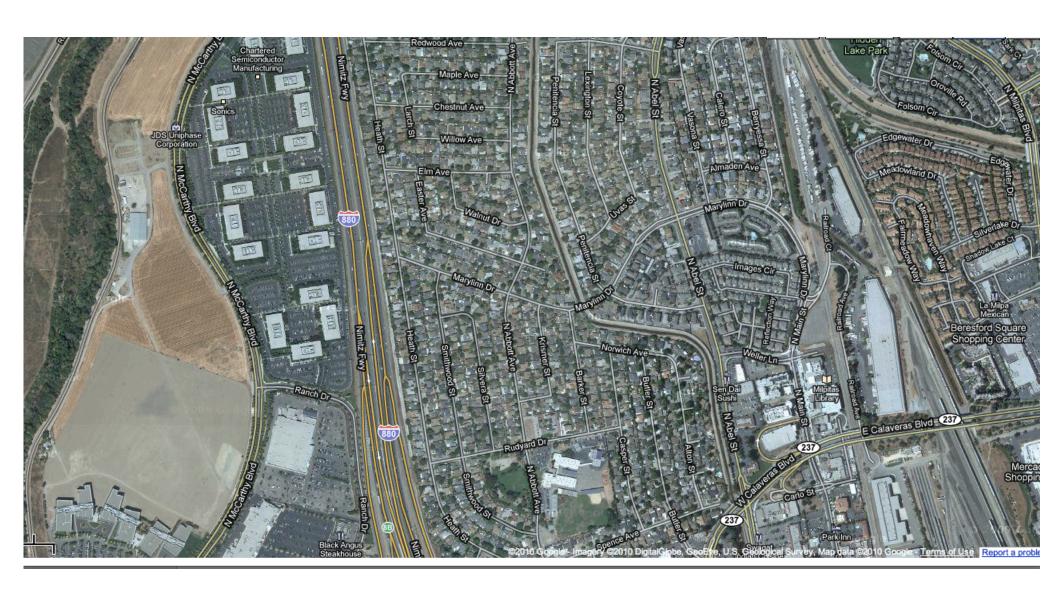
Transit proximate: Redwood Shores



Edgeless City: Novato



Edgeless City: Milpitas



Corporate Campus: Sun Microsystems (Redwood Slough, Menlo Park)

