



SAMCEDA
San Mateo County Economic Development Association

SAN MATEO COUNTY INDUSTRY OVERVIEW

Industry Information 2011

- 6 of the top 35 fastest growing companies in the Bay Area are headquartered in San Mateo County.
- 12 of the top 25 largest software companies in the Bay Area are headquartered in San Mateo County.
- 10 of the top 25 largest venture capital firms (ranked by capital under management) in the Bay Area are located in San Mateo County.
- 10 of the top 25 Biotech patent recipients in the Bay Area have facilities in San Mateo County.
- 8 of the top 25 Venture Capital funded biotech (total venture capital funding disclosed) in the Bay Area have facilities in San Mateo County.
- 7 of the top 25 Venture Capital clean tech companies in the Bay Area have facilities in San Mateo County.
- 6 of the top 25 largest digital entertainment companies in the Bay Area (based on number of Bay Area employees) have facilities in San Mateo County.
- 6 of the top 25 largest private equity firms in the Bay Area have offices in San Mateo County.

Venture Capital Industry June 2011

- Venture capitalists invested \$7.5 billion in U.S. companies in the second quarter, up 4.2% from the \$7.2 billion they expended in the comparable quarter the year before. Bay Area companies received 39% of all venture funding nationwide; 20% went to biomedical/health, 29% to software; 15% to IT services; 11% to industrial/business/energy and 10% to media/entertainment.

Real Estate (Commercial) September 2011

- Another positive sign is the drop in commercial vacancy rates to 13.9% in the third quarter of 2011 down from 17.6% at the close of 2010 which is the first time since 2008 that the vacancy rates fell below 14%.
- Sony Corporation signed a 450,505 square foot lease in San Mateo and Perfect World Entertainment leased 100,328 in Redwood Shores in the third quarter.

Real Estate (Retail) June 2011

- Retail vacancy is at 3.6%, which is a negligible increase from 3.5% in Dec. 2010. The year prior the vacancy rate was at 4.2%.
- For the North County (Brisbane, Burlingame, Colma, Daly City, Millbrae, Pacifica, San Bruno and South San Francisco) total retail space available is 3.8 million square feet.
- Vacancy rate for the North County is at 5.2%, a slight drop from 5.3% in December 2010.
- For the Central County (Foster City, Redwood Shores and San Mateo) total retail space available is 2.5 million square feet.

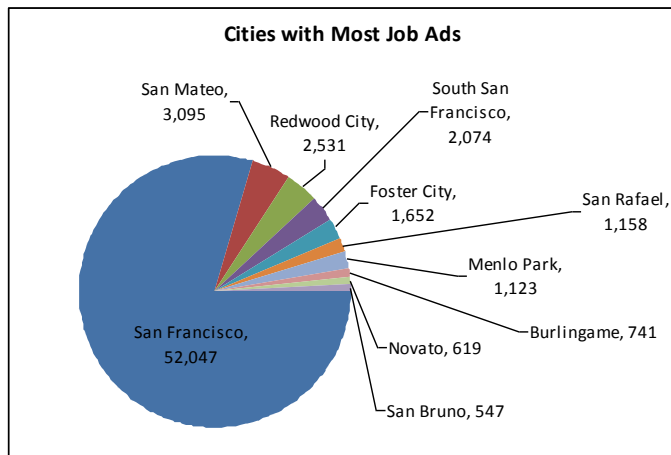


Real Estate (Retail) Q2 2011 (Continued)

- Vacancy rate is at 2.6%, a slight increase from December 2010 when it was at 2.5%.
- For the South County (Belmont, East Palo Alto, Half Moon Bay, Menlo Park, Redwood City and San Carlos) the total available retail space is 3.8 million square feet.
- Vacancy rate is at 2.5%, a slight increase from December 2010 when it was at 2.4%.

Employment and Business Dynamics November 2011

- As of November 2011 the most recent job ads for the Marin, San Francisco, and San Mateo counties are computer software engineers, applications, web developers, marketing managers, computer systems analysts, executive secretaries and administrative assistants, network and computer systems administrators, retail salespersons, registered nurses, sales managers, and software quality assurance engineers and testers.



CyberCoders	- 854
Salesforce.com	- 844
Genentech, Inc.	- 541
Deloitte	- 431
Kaiser Permanente	- 413
IBM	- 313
Appleone	- 288
Search One Inc	- 259
Modis	- 256
Allegis Group	- 256

Sources

- Bureau of Labor Statistics
- California Employment Development Department (EDD)
- Cassidy Turley
- Colliers International
- National Venture Capital Association
- Pricewaterhouse/Coopers
- SAMCAR
- San Francisco Business Times
- Terranomics (The Retail Division of BT Commercial)
- The Conference Board
- WANTED Technologies