

20-Minute Neighborhoods Analysis: Background Report and Analysis Area Summaries



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Bureau of Planning and Sustainability
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City of Portland, Oregon
Sam Adams, Mayor • Susan Anderson, Director



Acknowledgements

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Overview

20-Minute Neighborhoods Analysis

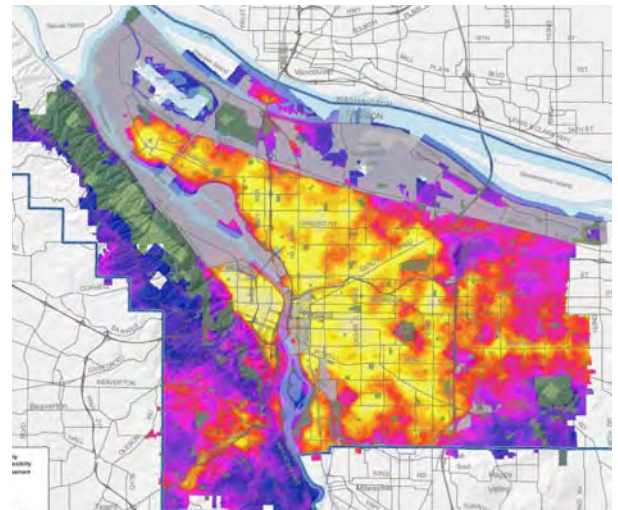
This report documents the methodology and results from the “20-Minute Neighborhoods Analysis,” which analyzed the extent to which features that contribute to walkability and local access to services vary across the city. The analysis took into account both the presence of local destinations, such as commercial services, parks, and schools; as well as factors that impact the ability to access these destinations, such as street connectivity, sidewalks, transit service and topography.

Analysis Area Summaries

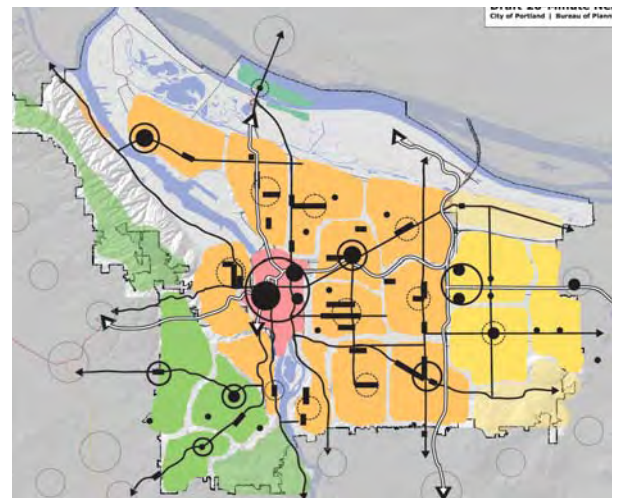
Following the description of the 20-Minute Neighborhoods Analysis methodology and results, the report includes a summary of services, demographics, and commercial indicators for 24 analysis areas. The analysis areas are primarily based around neighborhood business districts where local commercial services are concentrated, together with surrounding residential areas. The analysis area summaries supplement the citywide 20-Minute Neighborhoods Analysis by identifying at a more local level the extent to which areas have the commercial and community services, and the street and transit infrastructure, that allow people to meet their needs locally by walking, biking, or wheelchair. These summaries also include other information useful for understanding issues and opportunities related to local access to services and jobs, such as demographics and retail and employment conditions.

As part of the Portland Plan, the mapping and other results from the analysis are intended to inform discussion related to the community’s interest in fostering Portland as a walkable city in which most people have options to meet their needs locally and can get around safely and easily by walking, biking, or wheelchair. It identifies areas that have elements that currently make this possible, as well as areas with deficiencies that need to be addressed if they are to evolve into more pedestrian-oriented places, or where it may not be feasible – or desirable – to foster concentrations of people, services and infrastructure.

The information in this report is intended to be only a starting point for understanding how issues and needs vary across Portland. What is presented here is not intended to be a comprehensive inventory of everything that contributes to walkable neighborhoods or that may be essential community elements. Much more information could be useful to have presented at the geographic scale of the analysis area summaries. We encourage others to generate data for other characteristics using these analysis area geographies to enrich the community’s understanding of a range of issues and to provide additional points of comparison.



20-Minute Neighborhoods Analysis Map



Analysis Areas

Create vibrant neighborhoods where 90 percent of Portland residents and 80 percent of Multnomah County residents can easily walk or bicycle to meet all basic daily, non-work needs and have safe pedestrian or bicycle access to transit.

- Portland Climate Action Plan

20-Minute Neighborhoods Analysis: Methodology and Results

Purpose

As part of the public planning process of the Portland Plan and the city's Comprehensive Plan update, the Bureau of Planning and Sustainability undertook the 20-Minute Neighborhoods Analysis, a detailed study to assess the quality of the walking environment and accessibility of services in different parts of Portland. As the above objective from Portland's *Climate Action Plan* indicates, Portland has established objectives for walkable access to services, for which the 20-Minute Neighborhoods Analysis is intended to provide an objective basis for assessing current conditions and measuring future progress.

The 20-Minute Neighborhood Analysis emerged from community interest in having a more robust analysis of "walkability" – access by walking – in Portland than what was currently published or available online. Similar to Walk Score (www.walkscore.com), the 20-Minute Neighborhood Analysis represents the range of accessibility by walking in different parts of the city. However, while Walk Score focuses primarily on **proximity** to destinations such as commercial and community services, the 20-Minute Neighborhoods Analysis was developed to take into account additional factors related to access, particularly related to the street system and pedestrian conditions. It takes into account barriers to pedestrian access, such as topography (steep grades), rivers, freeways and difficult street connections. The analysis also considers factors that enhance the walking experience, such as the presence of sidewalks, variety of pathways or connections, proximity to high-quality frequent transit, and the proximity to clusters of amenities.

Note that reference in this analysis to walkability and the pedestrian environment is intended to be inclusive of users of wheelchairs and other mobility aids. Portland is committed to including accessible features, such as curb ramps, in all pedestrian infrastructure improvements to ensure that the pedestrian system is accessible to all.

What is a 20-Minute Neighborhood?

A 20-minute neighborhood is a place with convenient, safe, and pedestrian-oriented access to the places people need to go to and the services people use nearly every day: transit, shopping, healthy food, school, parks, and social activities. The term "20-minute neighborhoods" is not intended to convey a specific metric. Rather, the concept is another way to describe what have alternatively been called walkable environments, vibrant neighborhoods, complete communities, or urban villages. The 20-minute neighborhoods concept is about cultivating places where people can safely walk relatively short distances from home to the destinations and services they use on a daily basis.

Other Portland Plan documents refer to a related term, “neighborhood hubs.” Neighborhood hubs are compact places with concentrations of neighborhood businesses, community services, housing and public gathering places that serve the surrounding area, functioning as anchors to broader 20-minute neighborhoods.

20-minute neighborhoods, in combination with their hubs, have the following three basic characteristics:

- A walkable environment,
- Destinations that support a range of daily needs (i.e., shops, jobs, parks, etc.), and
- Residential density close to services.

Some aspects of a walkable environment are intuitive. They are compact, with good walking surfaces. They have direct, obvious and safe routes with frequent connections to attractive destinations – places to which people need and want to go. Other aspects of 20-minute neighborhoods or walkable environments may not be immediately obvious. However, a growing body of national and international research agrees on a basic set of features and elements that make walkable environments or 20-minute neighborhoods. According to the research, elements that contribute to walkable communities generally include the following:

- Concentrations of housing in close proximity to neighborhood services and transit;
- a street grid or other frequently connected network of local streets;
- sidewalks or other safe pedestrian connections with accessible design;
- building scale and design features that are comfortable for pedestrians;
- distinct and identifiable centers and public spaces;
- a variety of connected transportation options; and
- lower speed streets.

Analysis Approach

To understand how the 20-minute neighborhood concept might apply in Portland, the Bureau of Planning and Sustainability analyzed Portland’s neighborhoods in terms of two primary factors:

- **Distance and design:** how far people need to travel to reach destinations, and the extent to which street connectivity, sidewalks and other conditions facilitate walking. Access to frequent-service transit was also considered as a factor in providing options to reach destinations.
- **Destinations:** the presence of nearby businesses (grocery stores, restaurants, and retail) and public facilities (schools and parks).

Distance and Design

Some studies have shown that a 20-minute walk equates to approximately one mile when walking at a fast pace; however, the average person is more likely to walk distances between ¼ to a ½ mile under safe, conducive walking conditions (e.g., sidewalks and short blocks).

Intersection density and street connectivity, providing more direct pedestrian and bicycle access to destinations, are among the variables most highly correlated with walking and reduced vehicle miles travelled.¹ Frequent street connections increase the ability for pedestrians to conveniently access destinations in ways that minimize out-of-direction travel that can be a

¹ Ewing, Reid and Cervero, Robert, *Travel and the Built Environment*, 2010

deterrent to walking. Reflecting street connectivity, the 20-Minute Neighborhoods analysis mapped the one-mile travel radius around destinations as traveled along streets, instead of a 1-mile straight-line radius. Barriers presented by features such as freeways, rivers, and ravines that limit opportunities for pedestrian access, were also reflected in the mapping of the one-mile travel distances. Another type of barrier the analysis considered were slopes over 20-percent, as steep topography limits walking and biking accessibility.

The analysis also took into account the presence of sidewalks as a factor in walkability, as a lack of sidewalks reduces the ability of pedestrians to access destinations safely, especially along busy streets.

Transit, which gives access to more distant destinations, was also included in the analysis as a factor. The availability of transit increases the ability for people to reach jobs, services, and amenities not available within walking distance, reducing the need to drive in order to meet daily needs.

Destinations

Destinations refer to the quality and type of destination. In this analysis, the following destinations were evaluated: full service grocery stores, neighborhood-serving retail, eating & drinking establishments, parks, and elementary schools.

Research indicates that land use diversity and having a concentration of destinations within walking distance (along with street connectivity) are the variables most highly correlated with walking and reduced vehicle miles travelled.²

Specific types of local destinations most highly correlated with walking include grocery stores, retail stores, and eating and drinking establishments, particularly when such destinations were clustered together.³ In addition to these types of destinations, this analysis included parks and elementary schools, as elements that community members consider to be essential local services (Portland's *Parks 2020 Vision* states a goal of having a neighborhood park within a half mile of every Portland resident).

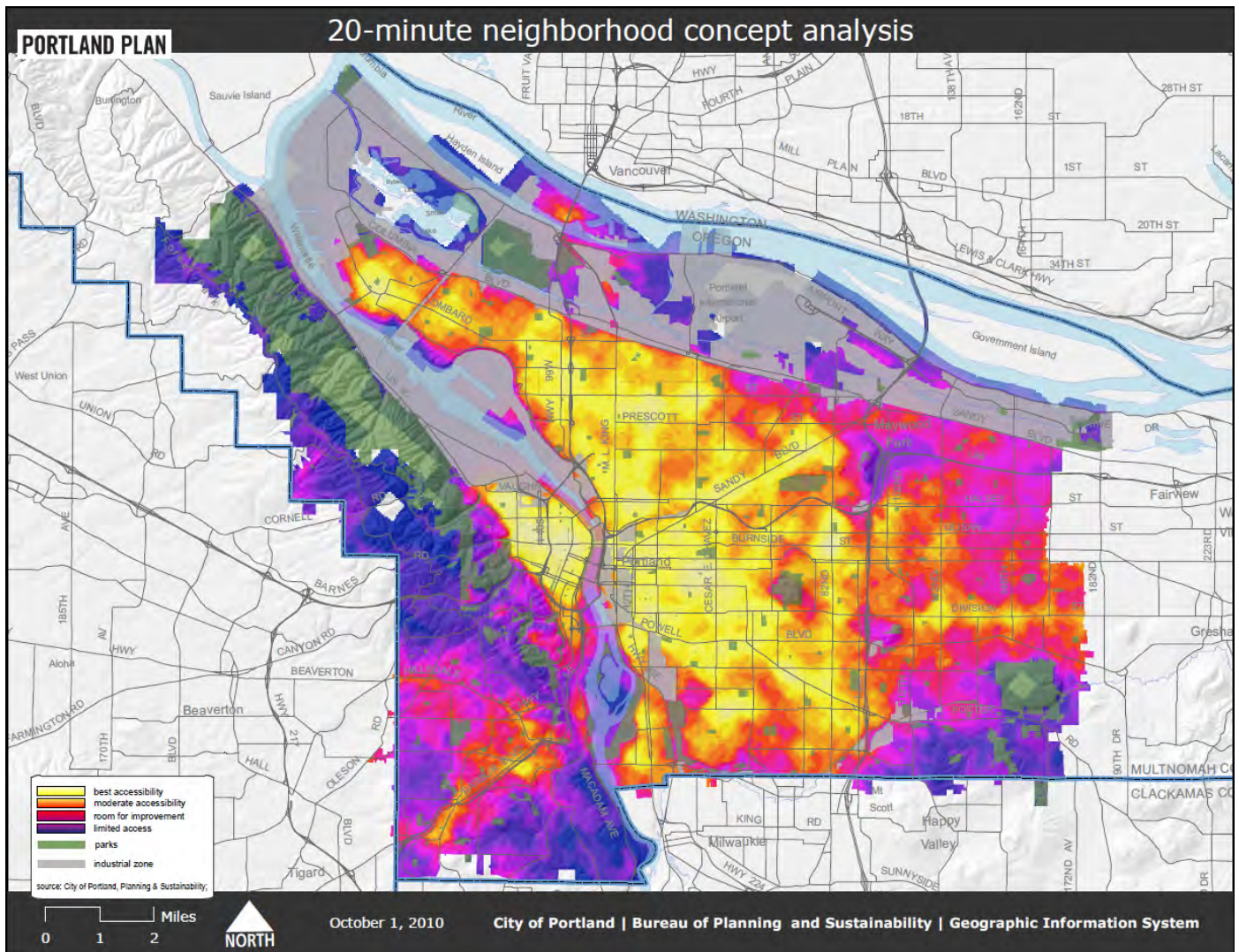
Others Considerations

The analysis did not include residential density as an input, although population is strongly related to factors that were part of the analysis, such as the amount of local commercial services. Density is needed to support the local retail services that are key components of walkable neighborhoods. Neighborhoods with a wide-range of services within walking distance of residents require higher residential densities than are typically found where the car is the dominate mode of travel. It appears from the literature that 12-18 households per acre (often achieved in older neighborhoods with a mix of houses and low-rise multifamily housing) is the minimum density needed to support a commercial district with the retail uses used in this analysis. As an example of this relationship, a retail industry standard is that 10,000 people are needed to support a full-service supermarket.

² *Ibid*

³ Moudon, Anne V. et al, *Operational Definitions of Walkable Neighborhood: Theoretical and Empirical Insights*, 2006

Analysis Mapping and Methodology Details



The primary product of the 20-minute neighborhood analysis was a “hot spots” map identifying the gradient of access to services in different parts of the city. “Hot spots” – orange, yellow, to white (hottest) reflect areas with a greater degree of access, both in terms of concentrations of local services as well as in terms of distance and street system accessibility. Magenta to blue areas have less convenient pedestrian access to services. This map is a composite based on GIS analysis of a range of elements that contribute to walkable neighborhoods: grocery stores, other commercial services, parks, elementary schools, street connectivity, sidewalks, frequent transit service, topography (see pages 9-13 for mapping of these inputs).

Typically, the areas shown in white to orange have a significant presence of most of these elements. The red to dark purple areas have some of the elements. The areas shown in blue are areas that lack significant 20-minute neighborhood characteristics.

This geographic information systems analysis used the Spatial Analyst Weighted Sum tool. The analysis captured data inputs up to one mile beyond the city boundary to give more accurate values in areas at the edge of the city. Inputs were simplified so that the input of any feature category was 0 – 3 (see below). Industrial areas were excluded from this analysis, as its focus was on residents’ access to services.

Input layers

- **Grocery stores:** full-service grocery stores (walking distance ¼, ½, 1 mile)
- **Commercial type 1:** convenience stores, beer, wine & liquor stores – NAICS codes 4451 (except those in full service grocery) and 4453 (walking distance ¼, ½, 1 mile)
- **Commercial type 2:** clusters of restaurants, specialty grocery stores, health and personal services, brewpubs, bakeries, bars, dry cleaning and laundry – NAICS codes 4452, 4461, 7221, 7222, 7224, 8123, 31212, 311811 (number of occurrences by square ¼ mile grid cell)
- **Parks Access:** (walking distance ¼, ½ & 1 mile – source, Parks Bureau [except school grounds])
- **Public Elementary Schools:** (walking distance ¼, ½, 1 mile)
- **Street intersections:** proxy for street connectivity (number of occurrences by square ¼ mile grid cell)
- **Sidewalks:** (area coverage percentage by square ¼ mile grid cell)
- **Frequent Service Transit Stops:** frequent service every 15 minutes (or better) during peak hours (walking distance ¼, ½, 1 mile)

Technical Details

ArcGIS Network Analyst

Where possible, Network Analyst was used to calculate walking distance. Slopes greater than 20 percent were removed (using Lidar Slope data) as were freeways and ramps, to take into account the barriers they present to walking. Distance increments used in the analysis were ¼, ½ and 1 mile. Those categories were assigned the values 1-3 for the grid analysis (ranging from a value of 3 for ¼ mile to 1 for 1 mile).

Quarter Mile Grid and Spatial Analysis

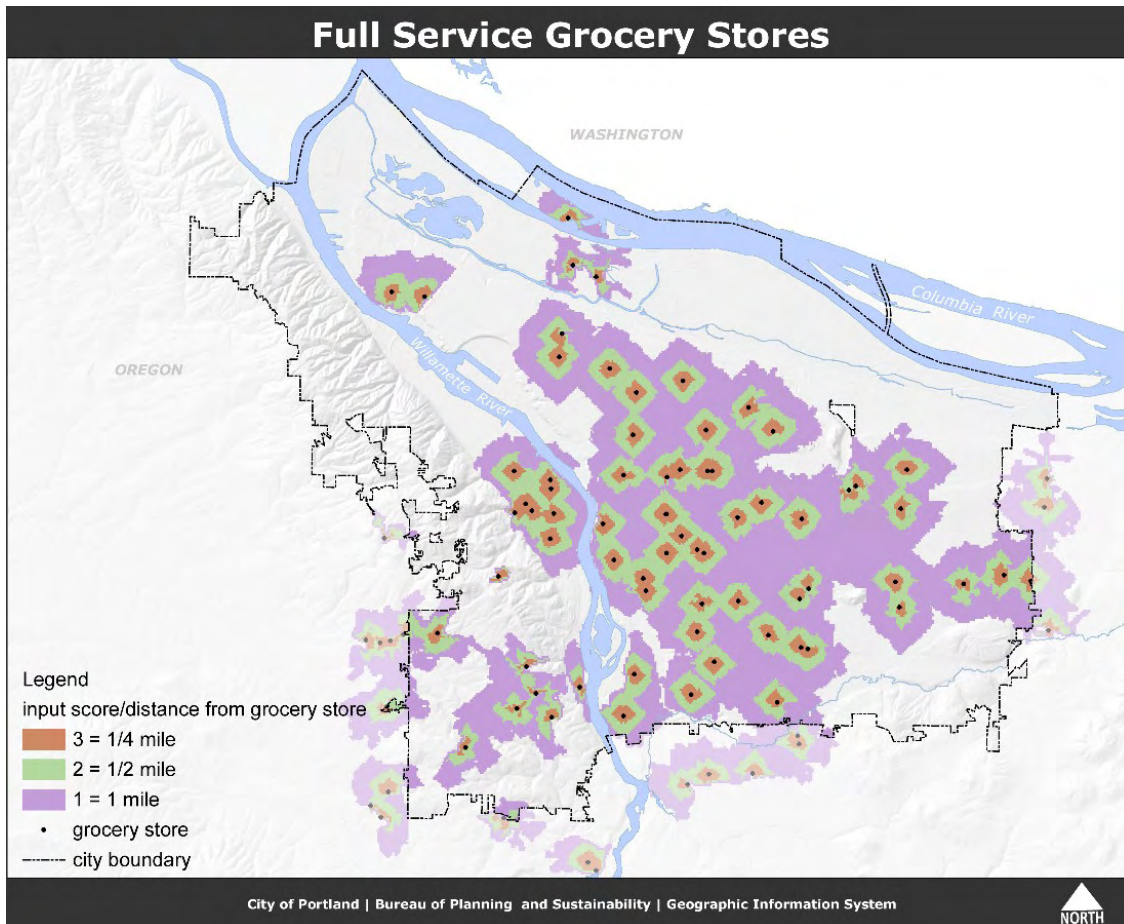
The concentration/density of elements (clusters of type 2 commercial, street intersections, sidewalk coverage) was measured using a 2640' x 2640' (quarter-mile square) grid cell by summing the number of occurrences per cell.

Total values for grid cell datasets were generalized into values of 1, 2 and 3 in order to make the inputs uniform to the Network Analyst walking distance scores. The Jenks (Natural Breaks) classification method with 3 categories was used to determine where the categories would be split for assigning 1-3 values for the grid. Zero values were excluded. The Jenks method was used to avoid manipulating results as much as possible. The network and grid cell datasets were then converted to raster datasets in preparation for creating the combined output raster dataset in Spatial Analyst. Each input was given equal weight in the latest version of the analysis. The output raster cell size chosen was 200' x 200' (reflecting the Portland city block size of 200' x 200'). The initial output raster dataset was run through the Neighborhood Statistics tool in Spatial Analyst for smoothing.

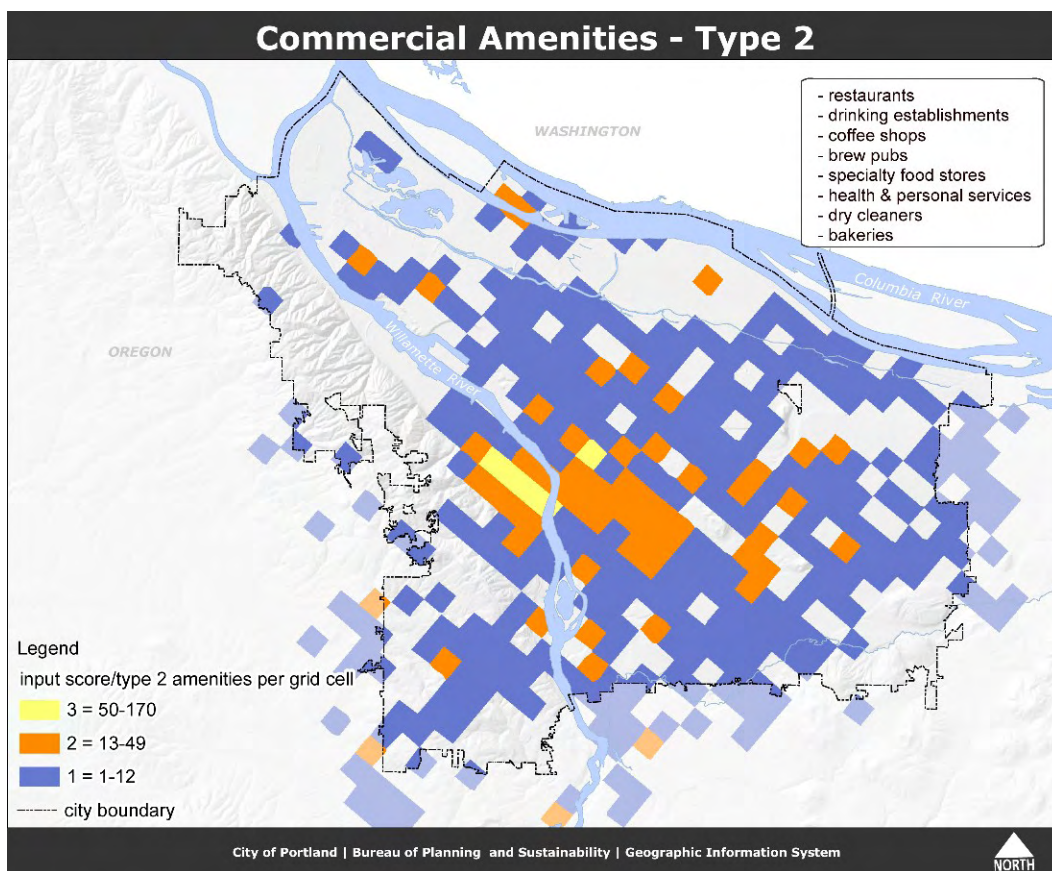
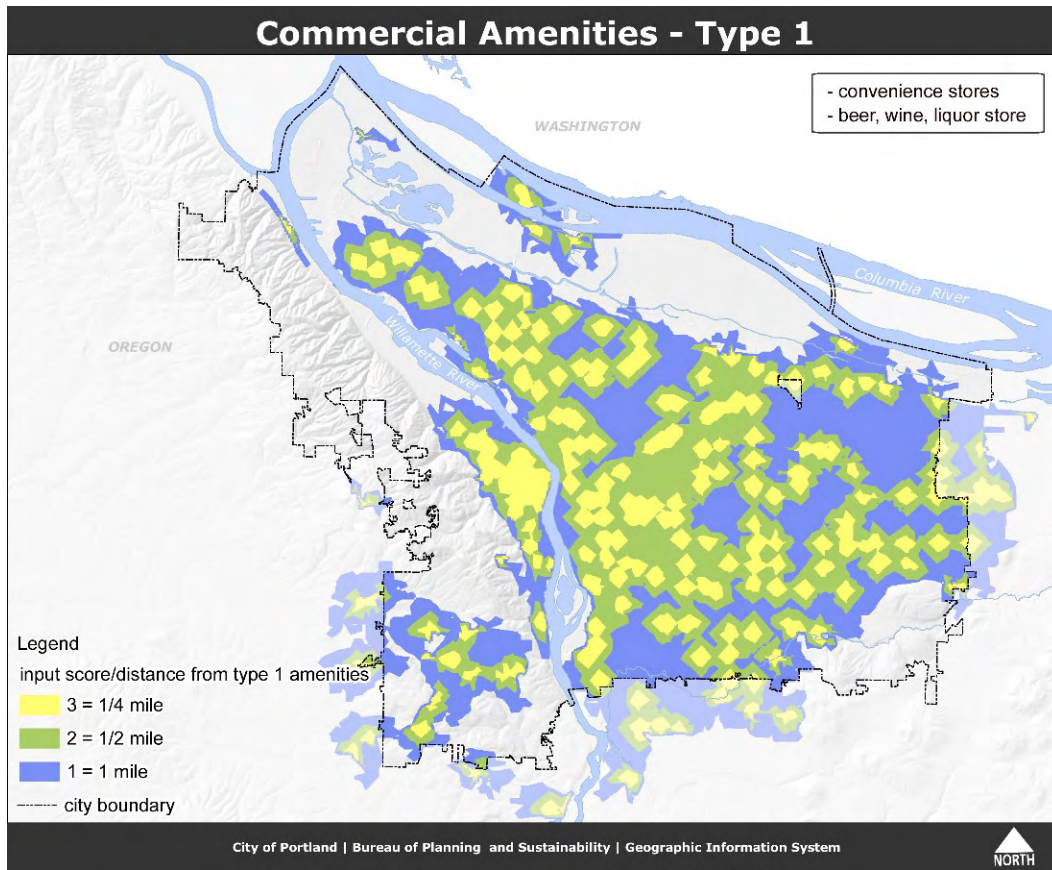
Categories and distance/concentration values

- Grocery stores: ¼ mile = 3, ½ mile = 2, 1 mile = 1
- Commercial type 1: ¼ mile = 3, ½ mile = 2, 1 mile = 1
- Commercial type 2 occurrences: 50-170 / 3, 13-49 / 2, 1-12 / 1
- Parks access points: ¼ mile = 3, ½ mile = 2, 1 mile = 1
- Elementary Schools: ¼ mile = 3, ½ mile = 2, 1 mile = 1
- Intersections: 45-114 = 3, 18-44 = 2, 1-17 = 1
- Sidewalk percent area of grid cell: 4.2-15% = 3, 1.6 – 4.1% = 2, 0.1-1.5% = 1
- Frequent Service Transit Stops: ¼ mile = 3, ½ mile = 2, 1 mile = 1

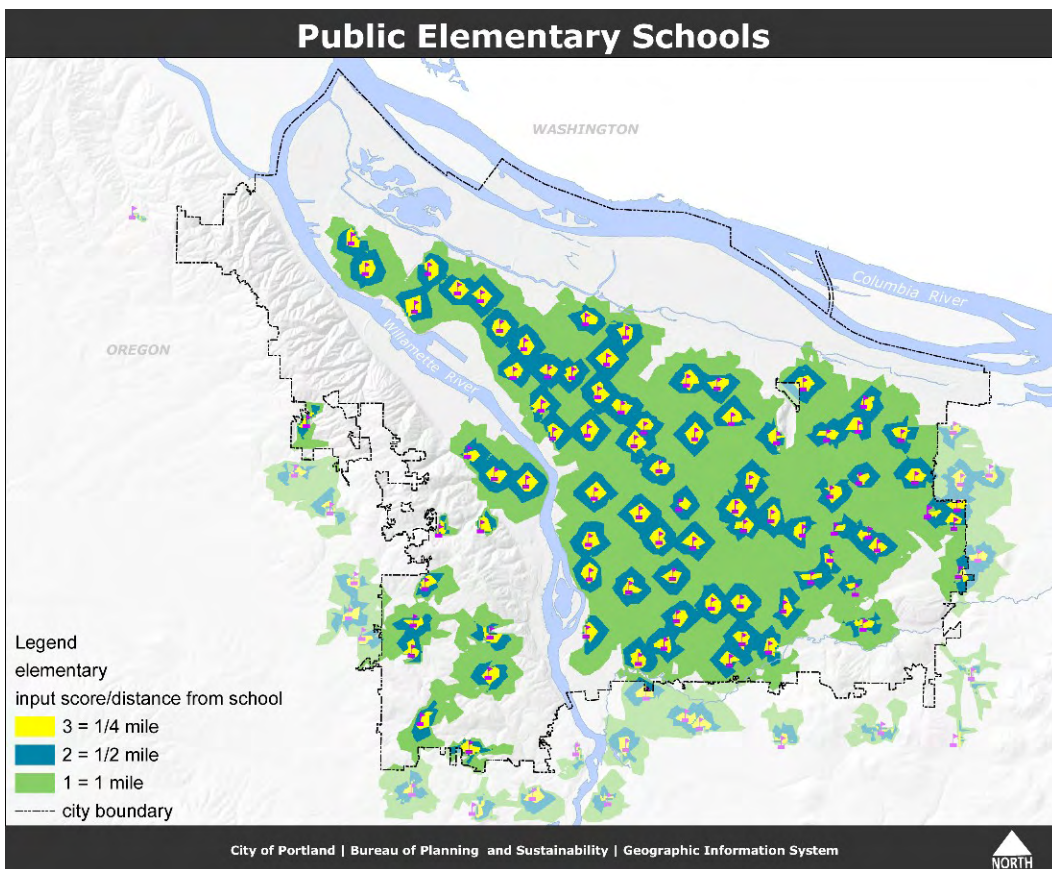
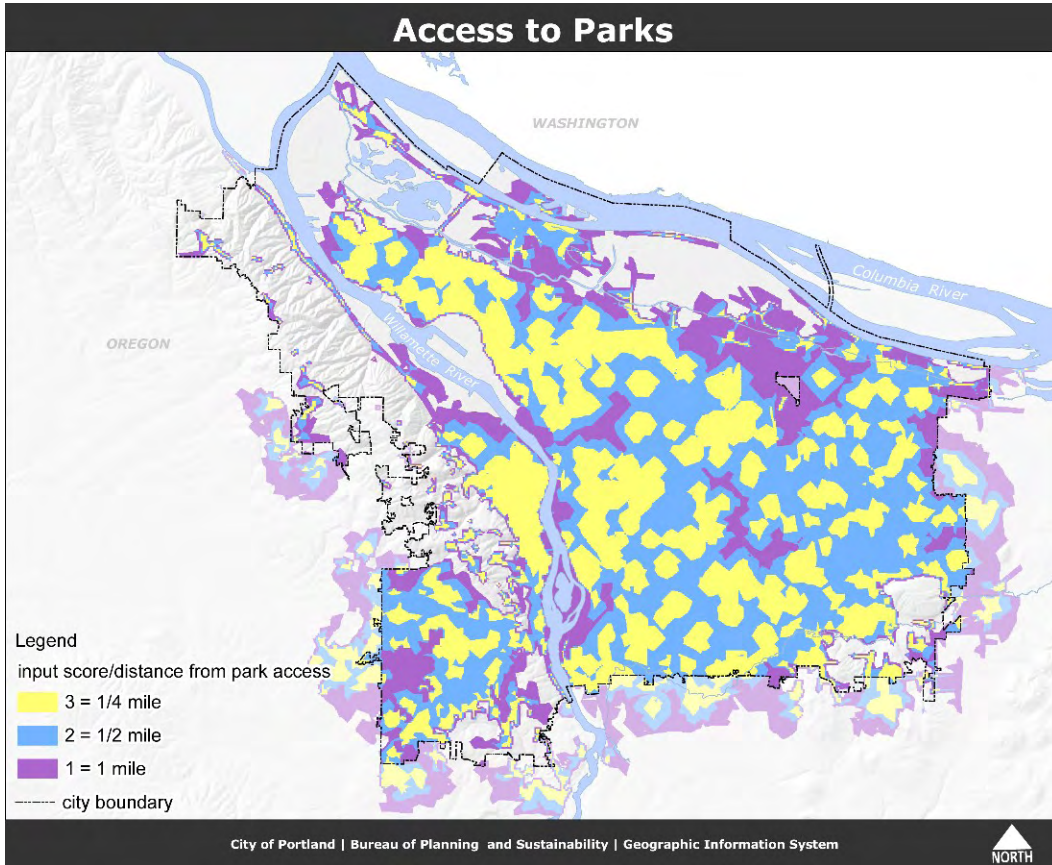
Input Mapping



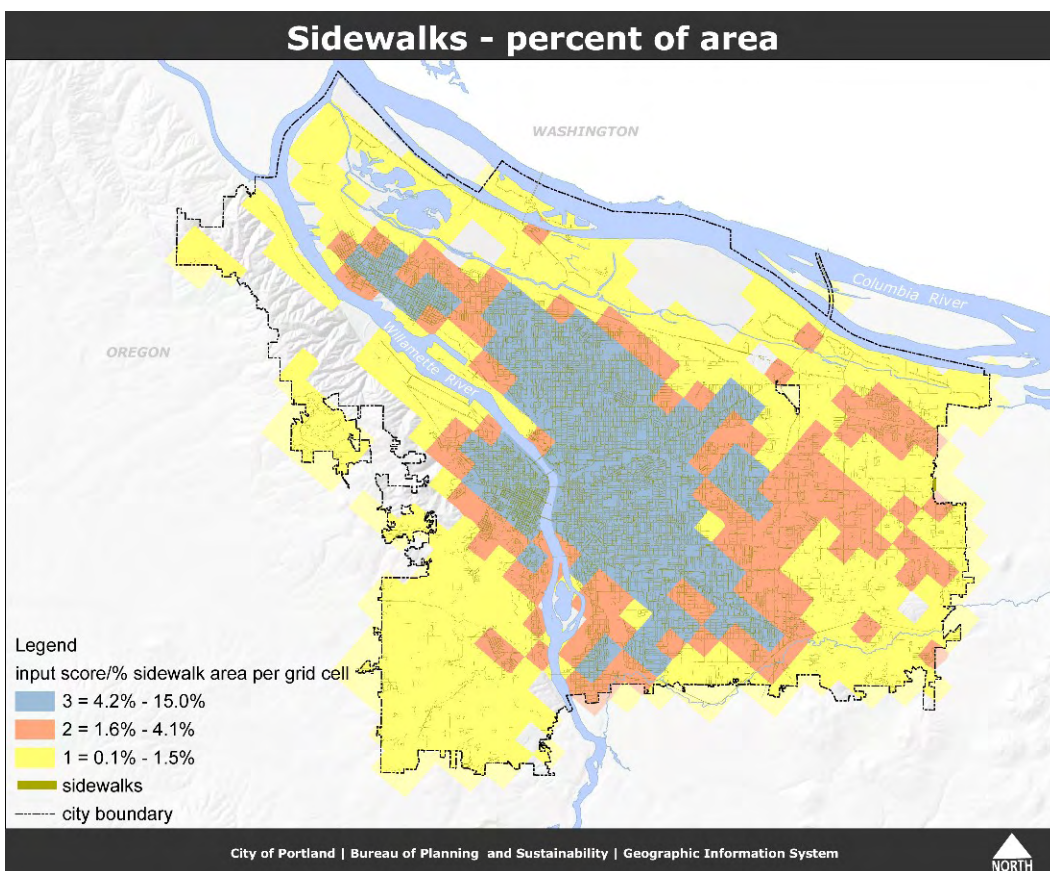
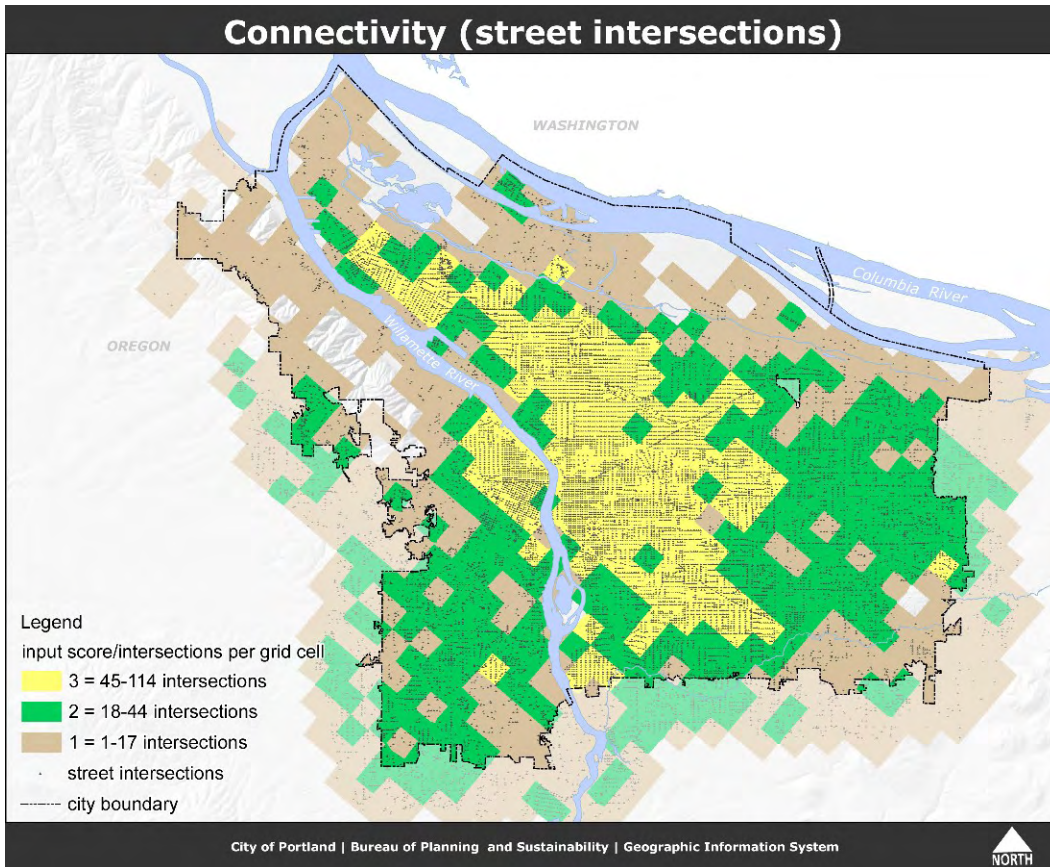
Input Mapping (continued)



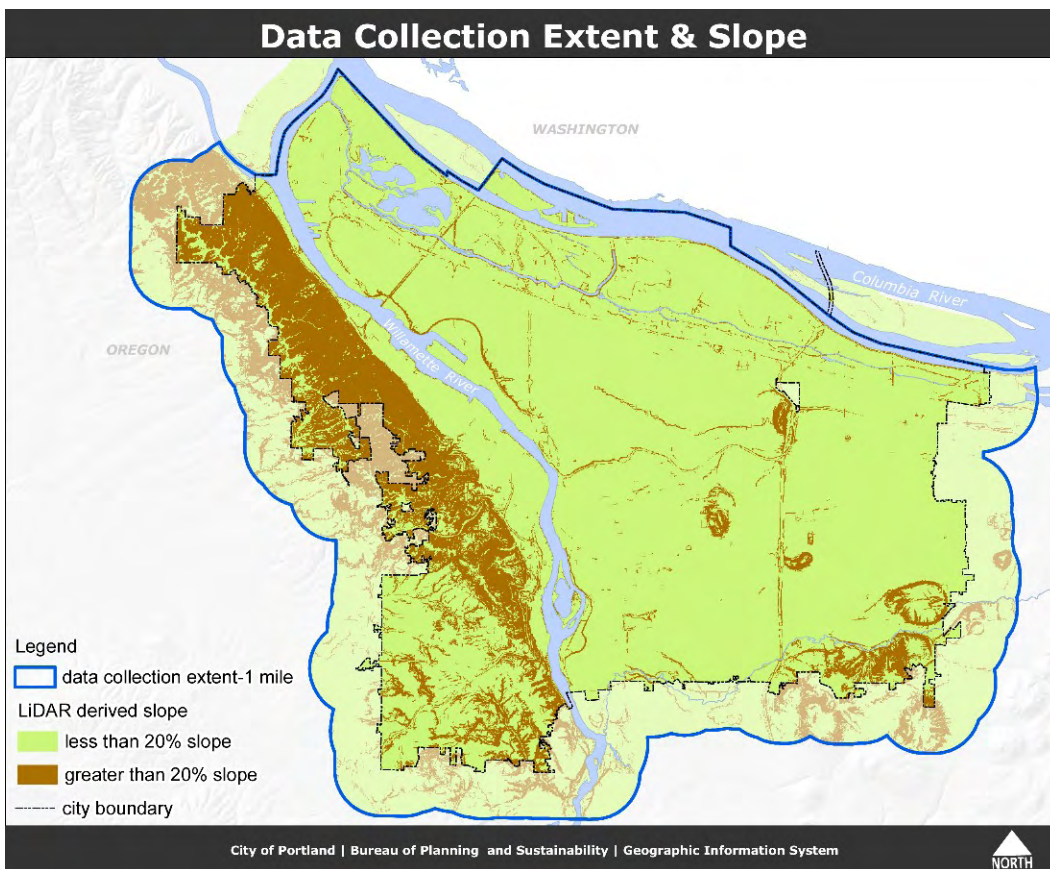
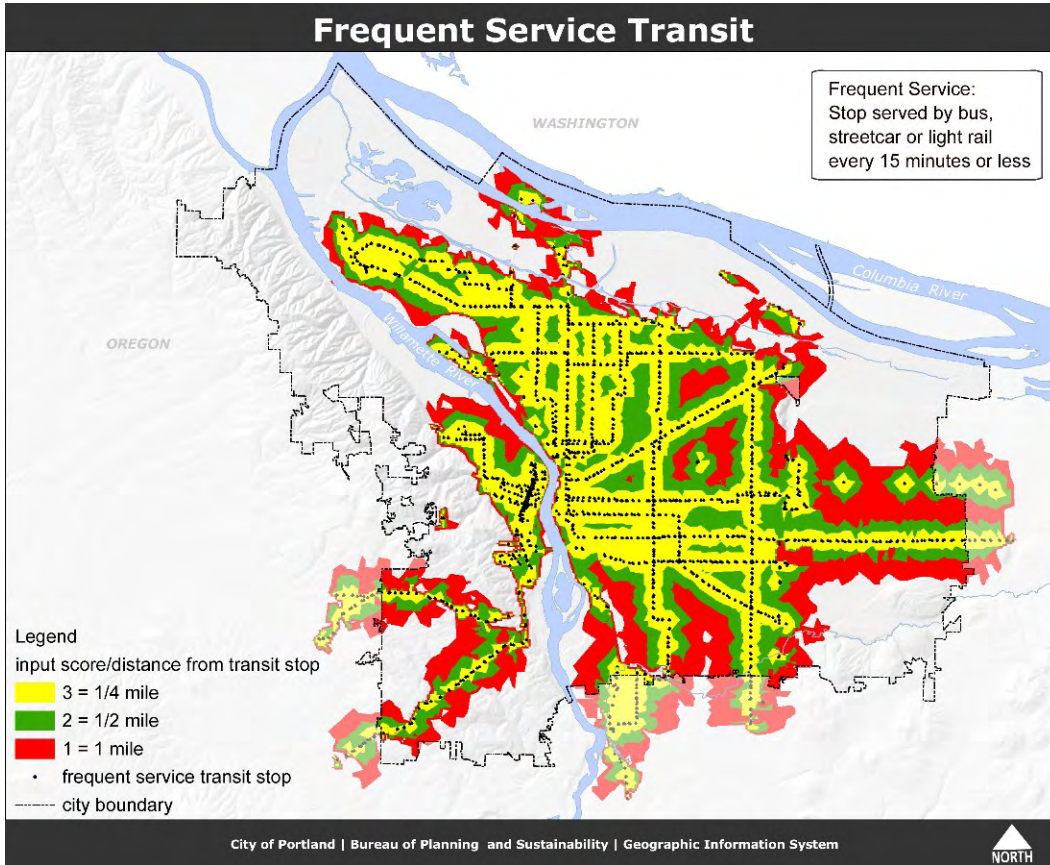
Input Mapping (continued)



Input Mapping (continued)



Input Mapping (continued)



Comments on Findings

The 20-minute neighborhood analysis mapping identified those areas of Portland that have attributes that contribute to walkable communities, as well as those areas that have less of these attributes. The analysis indicated that about 45 percent of Portlanders live in areas that are close to a broad range of services (businesses, grocery stores, parks, schools, frequent transit service) and that have street connections and pedestrian facilities that make walking safe and convenient. The areas with these attributes, yellow to white on the hot spots map, received at least 70 out of 100 points in an index used in the analysis to assess the relative presence of pedestrian-supportive characteristics across Portland.

The Central City and Inner neighborhoods (featuring main street commercial districts, sidewalks, and good street connectivity) were identified in the analysis as having the greatest degree of walkable access to destinations. Eastern and Western neighborhoods have less convenient access, with more dispersed neighborhood business districts that are beyond walking access for most residents, and a lack of sidewalks and street connectivity. Western neighborhoods have additional challenges to the ability to walk and bike to destinations resulting from hilly topography, ravines and stream corridors.



The majority of areas identified in the analysis mapping as hot spots are older, streetcar-era parts of the city, where the elements of a walkable neighborhoods were already reflected when the neighborhoods were created. Beyond these areas, fostering 20-minute neighborhoods will be more of a challenge. In some cases, there are existing centers of activity (Multnomah Village, Hillsdale or Gateway, for example) which could be strengthened. But the absence of sidewalks or lack of a finer grain of street connectivity, and the small proportion of population living close to services in some areas, are additional challenges that would need to be addressed in order to foster neighborhoods where residents have convenient walking or biking access to local services.

Issues for Future Consideration

The 20-Minute Neighborhoods Analysis mapping indicates that the city has some areas that have the elements of a 20-minute neighborhood, but also many other areas that lack these elements. How can public policies and actions affect the factors (distance and access, destinations and density) necessary to support the evolution of 20-minute neighborhoods in more parts of the city? The following are additional questions, spurred by the analysis, that may merit future consideration.

Distance and Design (ease of access):

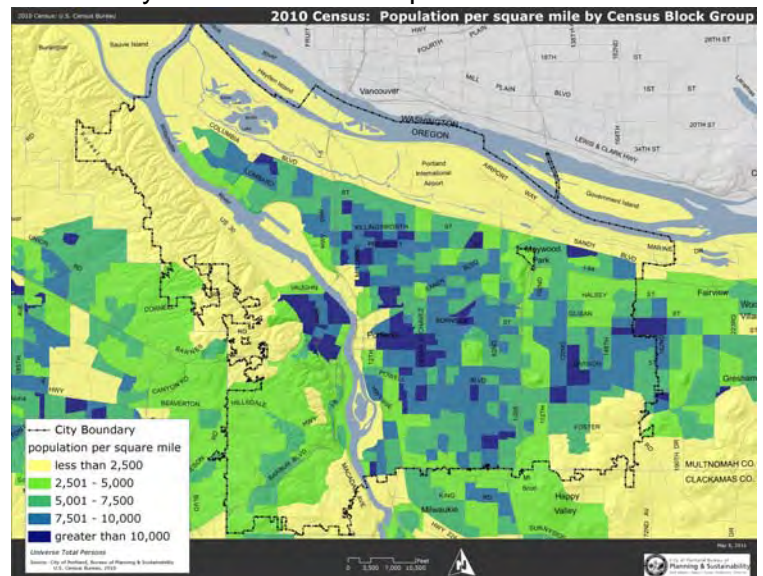
- What are options for sidewalk improvements and providing additional connections so that accessibility is improved?
- To what extent can bicycle and transit access expand the market area for neighborhood services, without increasing densities within walking distance?
- Can transit access to services function as a suitable replacement to having services available within walking distance?
- How can travel options be expanded in areas that lack the population to support concentrations of local commercial services or convenient transit service?

Destinations:

- Do our policies and implementation approaches support the market for and development of local retail and other services, as well as walkable access to parks, natural areas and schools?
- Given that concentrations of destinations facilitate walking, bicycle and transit access, should a priority be placed on creating compact areas with concentrations of commercial and community services, instead of spreading them more broadly across the city?
- How do we ensure areas of the city are not underserved, basic needs are met, and have the appropriate commercial services for the community, particularly in areas with demographics that may not be conducive to private-sector investment?

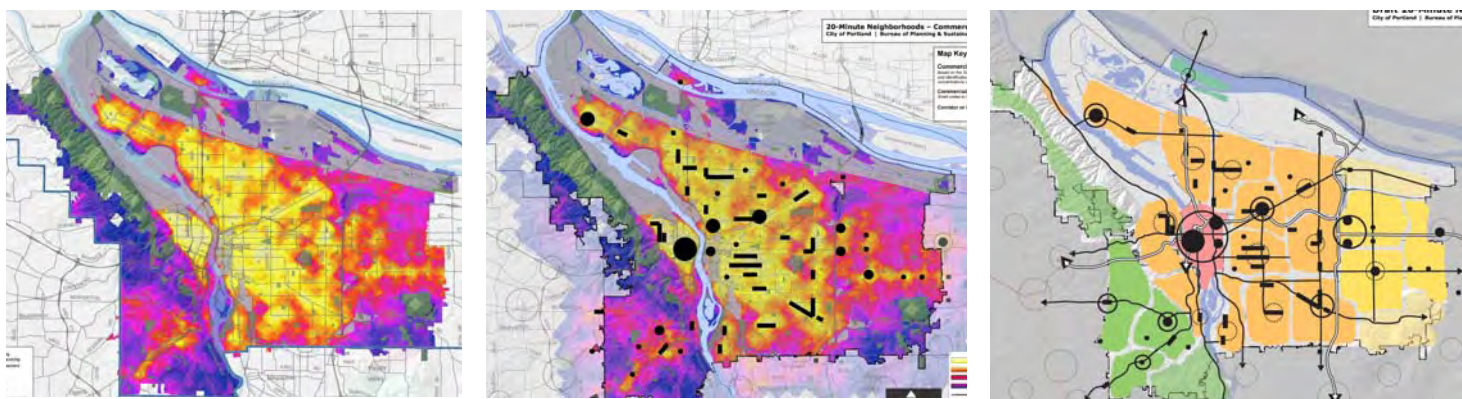
Density:

- How do we locate and design for increased densities of residents in appropriate locations, and are there population thresholds that need to be met to support neighborhood retail and public services?
- If the Climate Action Plan objective for 90 percent of Portlanders to live in areas close enough to walk or bike to local services is to be met in 25 years, how much of this should involve focusing growth in areas that already have services and pedestrian-supportive infrastructure, versus focusing growth, development and infrastructure in areas that do not have them in order to transform them into walkable places?
- Are Portlanders willing to accept increased housing densities in their neighborhoods, if this is accompanied by more commercial and community services? (Note the correlations between this map showing population densities and the concentrations of commercial services shown in the input maps of this analysis.)



Finally, a topic to consider is whether some areas of the city are not appropriate places for 20-minute neighborhoods. That is the clear answer for some areas, especially single or exclusive use areas like the airport and marine terminals, the industrial sanctuaries and large natural areas like Forest Park. These areas are necessary in a city, but their value lies in their large area dedicated to a specific use. They should be connected to the system of 20-minute neighborhoods, but it is not desirable or practical to have them become 20-minute neighborhoods themselves.

There are also areas that are primarily residential, set among streams and forested hillsides or other areas of high environmental value, where the preservation and connectivity of natural resource features may be of such a priority that they should not be compromised by the density or access requirements of 20-minute neighborhoods. The fact that Portland is spread across 134 miles of land area also suggests that creating walkable places with concentrations of people and destinations will require focused growth, as Portland's existing and anticipated population is not large enough to support this everywhere within the foreseeable future.



Introduction to Analysis Area Summaries: Services, Demographics and Market Characteristics

The 24 analysis area summaries in **Part 2** of this report provide a greater level of detail, at a more localized level, of the range of commercial and community services in different parts of the city, and includes mapping showing the pedestrian, bicycle and transit infrastructure in each area. The summaries also include information on demographics and on retail market and employment indicators. All of this information is intended to support community discussion on local issues and opportunities related to overcoming barriers to fostering walkable communities that provide opportunities to meet needs locally.

The geographies of most of the analysis areas were based around existing neighborhood business districts that were at the cores of the 20-minute neighborhoods analysis hot spots. In general, the analysis areas were configured to include areas within roughly a mile of the core commercial areas, based on the key role of these neighborhood business districts in providing local access to services. Exceptions to this are four analysis areas that the 20-Minute Neighborhood Analysis did not identify as having walkable access to major concentrations of neighborhood commercial services (Forest Park-Northwest Hills, Tryon Creek-Riverdale, Pleasant Valley, and Parkrose-Argay). Note that the commercial hubs and the analysis area geographies and names used here are for analysis purposes only. They do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Each analysis area summary includes information on:

1. Services and Amenities

- Commercial districts
- Grocery stores
- Community centers
- Libraries
- Parks and open space
- Tree canopy coverage
- Public schools
- Colleges (campus)
- Hospitals
- Farmers markets
- Transit centers and light rail stations
- Walkable access score (from the 20-Minute Neighborhoods Analysis)
- Percentages of area population living within:
 - 1/2 mile of a park
 - 1/2 mile of a public elementary school
 - 3 miles of a full-service community center
 - 1/2 mile of a full-service grocery store
 - 1/4 mile of a frequent service transit stop

2. Maps

- Services and amenities (besides most items listed above, also identifies locations of places of worship and daycare centers)
- Transit infrastructure (including existing and planned light rail lines)
- Sidewalks and bicycle infrastructure

3. Demographics (2000 – 2010)

(Each analysis area summary includes charts with comparative information for the metro area, Portland as a whole, the individual analysis area, and nearby analysis areas)

- Population
- Median age
- Average household size
- Diversity
- Percent college graduates
- Median household income
- Median home value
- Percent renters of occupied housing units

4. Commercial Real Estate Indicators

- Retail and office space
- Retail and office vacancy
- Retail and office rents
- Retail market profile

Note: The retail market profile shows the estimated retail spending of analysis area residents, based on population and demographic characteristics, compared to the retail sales and types of retail in the area. "Leakage" indicates the estimated amount of residents' spending that is spent outside the area – leakage is indicated by a positive retail gap number. "Surplus" indicates the amount of estimated retail sales in the area that is in excess of what could be attributed to area residents, reflecting that the area is attracting shoppers from outside the analysis area – surplus is indicated by a negative number (demand – supply = retail gap).

5. Employment

- Numbers and types of jobs
- Numbers and types of firms
- Average annual wages, by type of job

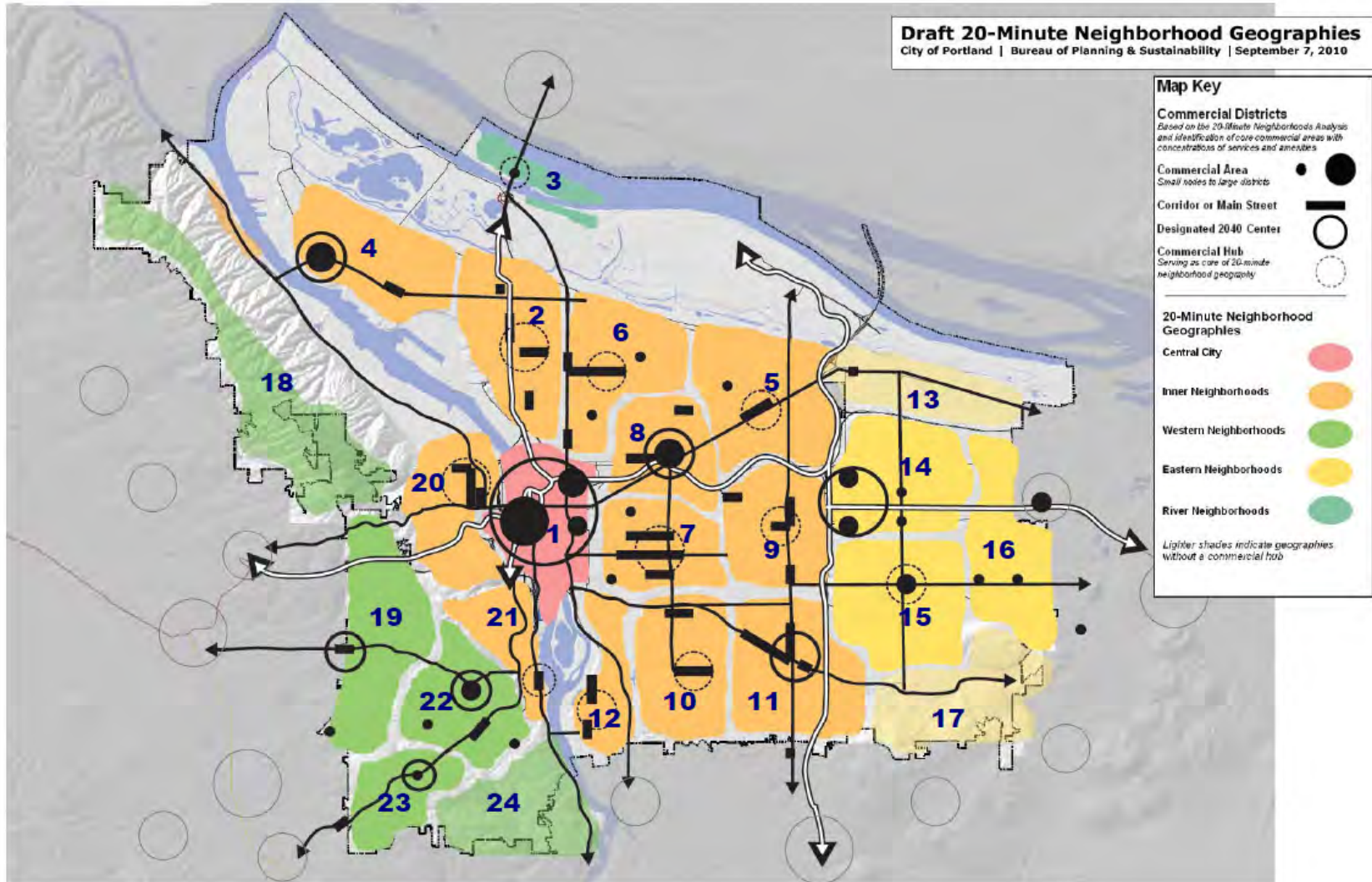
Note: Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations. At the scale of the analysis area geographies, major shifts in numbers of jobs can sometimes be the result of a large firm or public agency's change of administrative office address.

Access to Services and Amenities and Demographics Summaries

For comparison purposes and as a guide to the analysis area geographies, the map and table on the following two pages present summary information on local access to services (mostly related to destinations used in the 20-Minute Neighborhoods Analysis) within each of the analysis areas. The table also summarizes each analysis area's averaged walkability score (from the 20-Minute Neighborhoods Analysis index), and provides comparative figures on park acreage, tree canopy coverage, and population. This is followed by a summary of analysis area demographics.

20-Minute Neighborhood Analysis Areas

Access to services and amenities summary



Access to Services and Amenities Summary

20-Minute Analysis Area	Walkability score	Park acreage	Tree canopy coverage	People per square mile	Population	% within 1/2 mile of grocery store	% within 1/2 mile of park	% within 3 miles of full-service community center	% within 1/2 mile of elementary school	% within 1/4 mile of frequent transit
1 Central City	70	92	10%	8,000	30,900	66%	97%	97%	2%	76%
2 Interstate Corridor	63	90	23%	6,500	33,900	16%	97%	100%	58%	75%
3 Hayden Island-Bridgeton	26	30	18%	2,100	4,200	12%	26%	0%	0%	0%
4 St. Johns	43	229	22%	5,000	33,300	15%	91%	99%	45%	65%
5 Roseway-Cully	46	341	19%	4,800	34,300	17%	73%	17%	34%	45%
6 MLK-Alberta	65	139	18%	7,200	37,200	46%	94%	86%	53%	82%
7 Belmont-Hawthorne-Division	79	95	23%	10,100	36,900	59%	100%	57%	52%	87%
8 Hollywood	70	40	22%	8,000	30,700	54%	87%	87%	43%	57%
9 Montavilla	63	209	22%	7,200	31,600	34%	82%	100%	41%	46%
10 Woodstock	61	233	25%	6,700	31,300	46%	100%	96%	53%	41%
11 Lents-Foster	57	213	20%	7,000	43,900	31%	95%	100%	40%	43%
12 Sellwood-Moreland-Brooklyn	55	309	23%	5,400	15,300	46%	95%	0%	30%	17%
13 Parkrose-Argay	32	89	17%	4,000	14,700	0%	79%	5%	24%	1%
14 Gateway	48	296	22%	5,600	28,500	31%	96%	98%	22%	12%
15 122nd-Division	47	131	26%	7,200	40,100	15%	99%	92%	32%	15%
16 Centennial-Glenfair-Wilkes	46	87	24%	7,100	31,300	16%	79%	31%	25%	14%
17 Pleasant Valley	15	1301	53%	2,300	11,800	0%	59%	35%	11%	0%
18 Forest Park-Northwest Hills	7	5417	81%	500	8,400	0%	6%	0%	1%	0%
19 Raleigh Hills	22	120	52%	3,000	15,400	13%	55%	88%	11%	5%
20 Northwest	39*	722	53%	5,400	21,800	59%	74%	76%	53%	51%
21 South Portland-Marquam Hill	31	396	56%	3,400	8,600	7%	56%	55%	0%	23%
22 Hillsdale-Multnomah-Barbur	40	192	40%	4,600	19,600	18%	75%	100%	20%	7%
23 West Portland	35	84	42%	4,200	10,800	13%	82%	98%	19%	12%
24 Tryon Creek-Riverdale	15	532	67%	1,900	9,700	5%	16%	68%	3%	0%

Numbers approximate only, as analysis areas do not entirely correspond to census block boundaries.
 Source: US Census 2010, American Community Survey 2005-2009, ESRI Business Analyst -- 05/19/2011
 *Score for "flats" portion of analysis area [primarily the NW District] is 73. Score for hillside areas is 22.

Demographics Summary

20-Minute Analysis Area	Population	Households	Employees	Land Area (sq. mi.)	Activity Density (employees + population per sq. mi.)	Residential Density (population per sq. mi.)	Diversity Index	Median Household Income	Median Home Value	Percent Renters
Metropolitan Statistical Area	2,226,000	925,000	1,050,000	6,683	490	330	48	\$62,000	\$242,100	34%
Portland City	584,000	266,000	376,000	120	8,000	4,870	55	\$54,000	\$224,900	42%
1 Central City	30,931	21,726	131,083	3.9	41,500	7,930	50	\$28,000	\$400,000	72%
2 Interstate Corridor	33,855	15,152	19,085	5.2	10,200	6,510	73	\$50,000	\$197,000	37%
3 Hayden Island-Bridgeton	4,223	2,501	5,221	2	4,700	2,110	35	\$55,000	\$80,000	15%
4 St. Johns	33,262	13,042	7,052	6.7	6,000	4,960	72	\$51,000	\$192,000	40%
5 Roseway-Cully	34,333	14,583	11,094	7.1	6,400	4,840	65	\$59,000	\$224,000	31%
6 MLK-Alberta	37,215	16,468	13,789	5.2	9,800	7,160	72	\$54,000	\$263,000	37%
7 Belmont-Hawthorne-Division	36,907	18,579	12,554	3.7	13,400	9,970	39	\$54,000	\$303,000	53%
8 Hollywood	30,699	14,732	21,489	3.9	13,400	7,870	34	\$65,000	\$369,000	39%
9 Montavilla	31,581	14,003	6,129	4.4	8,600	7,180	53	\$56,000	\$227,000	38%
10 Woodstock	31,266	13,802	8,873	4.6	8,700	6,800	43	\$55,000	\$247,000	39%
11 Lents-Foster	43,891	17,796	7,076	6.3	8,100	6,970	58	\$51,000	\$191,000	37%
12 Sellwood-Moreland-Brooklyn	15,349	7,851	10,660	2.9	9,000	5,290	33	\$53,000	\$284,000	48%
13 Parkrose-Argay	14,703	5,750	10,477	3.7	6,800	3,970	65	\$52,000	\$270,000	37%
14 Gateway	28,498	11,813	12,905	5.1	8,100	5,590	54	\$53,000	\$229,000	39%
15 122nd-Division	40,102	14,543	5,998	5.6	8,200	7,160	58	\$53,000	\$208,000	37%
16 Centennial-Glenfair-Wilkes	31,343	12,135	3,563	4.5	7,800	6,970	59	\$52,000	\$230,000	36%
17 Pleasant Valley	11,809	3,945	887	5.2	2,400	2,270	37	\$71,000	\$303,000	20%
18 Forest Park-Northwest Hills	8,424	3,472	4,076	15.9	800	530	28	\$125,000	\$656,000	13%
19 Raleigh Hills	15,446	6,849	3,699	5.2	3,700	2,970	28	\$79,000	\$392,000	24%
20 Northwest	21,794	14,026	21,877	4	10,900	5,450	30	\$52,000	\$636,000	63%
21 South Portland-Marquam Hill	8,560	5,119	47,618	2.5	22,500	3,420	31	\$62,000	\$429,000	49%
22 Hillsdale-Multnomah-Barbur	19,601	9,471	5,725	4.3	5,900	4,560	35	\$64,000	\$343,000	36%
23 West Portland	10,836	4,868	3,626	2.6	5,600	4,170	41	\$70,000	\$319,000	31%
24 Tryon Creek-Riverdale	9,668	3,609	1,546	5.1	2,200	1,900	25	\$99,000	\$441,000	14%

Numbers should be used with care as shapes in no way correspond to block boundaries

rounded percentages should be used only as a general guide; decimal places provided in this form to show difference between <1% and 0%

Source: US Census 2010, American Community Survey 2005-2009, ESRI Business Analyst -- 05/19/2011

Note: Some data is rounded for ease of readability. Also, some data are estimates based on best available data from the U.S. Census.

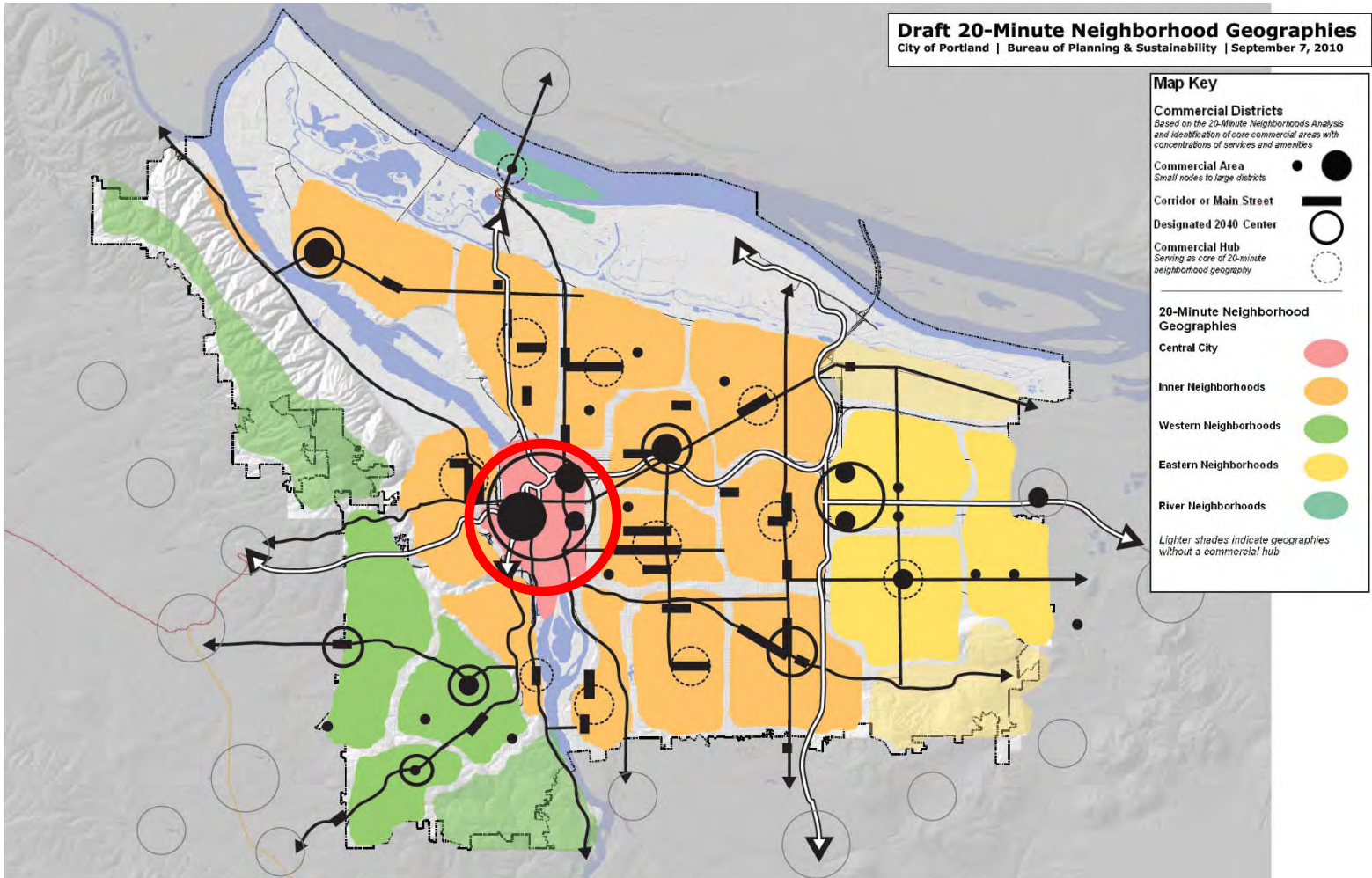
Appendix A: Analysis Area Summaries

- 1 Central City
- 2 Interstate Corridor
- 3 Hayden Island-Bridgeton
- 4 St. Johns
- 5 Roseway-Cully
- 6 MLK-Alberta
- 7 Belmont-Hawthorne-Division
- 8 Hollywood
- 9 Montavilla
- 10 Woodstock
- 11 Lents-Foster
- 12 Sellwood-Moreland-Brooklyn
- 13 Parkrose-Argay
- 14 Gateway
- 15 122nd-Division
- 16 Centennial-Glenfair-Wilkes
- 17 Pleasant Valley
- 18 Forest Park-Northwest Hills
- 19 Raleigh Hills
- 20 Northwest
- 21 South Portland-Marquam Hill
- 22 Hillsdale-Multnomah-Barbur
- 23 West Portland
- 24 Tryon Creek-Riverdale

Central City Analysis Area

Including the Downtown, Pearl, Old Town / Chinatown, Lloyd neighborhoods, and parts of the South Portland, Goose Hollow, Eliot, Kerns, Buckman and Hosford-Abernethy neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Central City Analysis Area

Services and Amenities

Population: 30,900 people (18,400 households)
Land Area: 3.9 square miles (8,000 people per sq. mile)

Commercial Districts

The Central City includes Portland's largest concentration of retail and other commercial service, located throughout non-industrial portions of the area. The Central City's most significant retail centers include the Downtown retail core, the Lloyd Center Mall, and the Brewery Blocks area of the Pearl District.

Grocery stores: 7

Community Amenities

Community Centers: None

Libraries: 1 (Central Library)

Parks and Open Spaces: 92 acres - including Governor Tom McCall Waterfront Park, South Waterfront Park, Pioneer Courthouse Square, the South and North Park Blocks, Jamison Square, and Holladay Park.

Tree Canopy Coverage: 10%

Public Schools: 1 high school (Lincoln [Benson located adjacent to northeastern boundary of analysis area])

No K-8 schools (Abernethy and Buckman Arts elementary schools located adjacent to eastern boundary of analysis area)

Colleges (campus): 3 (Portland State University, Pacific Northwest College of Art, Oregon Health & Science University)

Hospitals: None (Located nearby on Marquam Hill are Oregon Health & Science University, and Doernbecher Children's, Shriners, and Veterans hospitals. Legacy Emanuel Hospital adjacent to northeast boundary.)

Farmers Markets: 3 (Portland Farmers Markets at Portland State University, Shemanski Park, and Pioneer Courthouse Square)

Transit Centers/Stations: 2 Transit Centers (Portland Transit Mall, Rose Quarter Transit Center) and 31 light rail stations

Walkable Access Score: 70 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

Within 1/2 mile of a park: 97%

Within 1/2 mile of a public elementary school: 2%

Within 3 miles of a full-service community center: 97%

Within 1/2 mile of a full-service grocery store: 66%

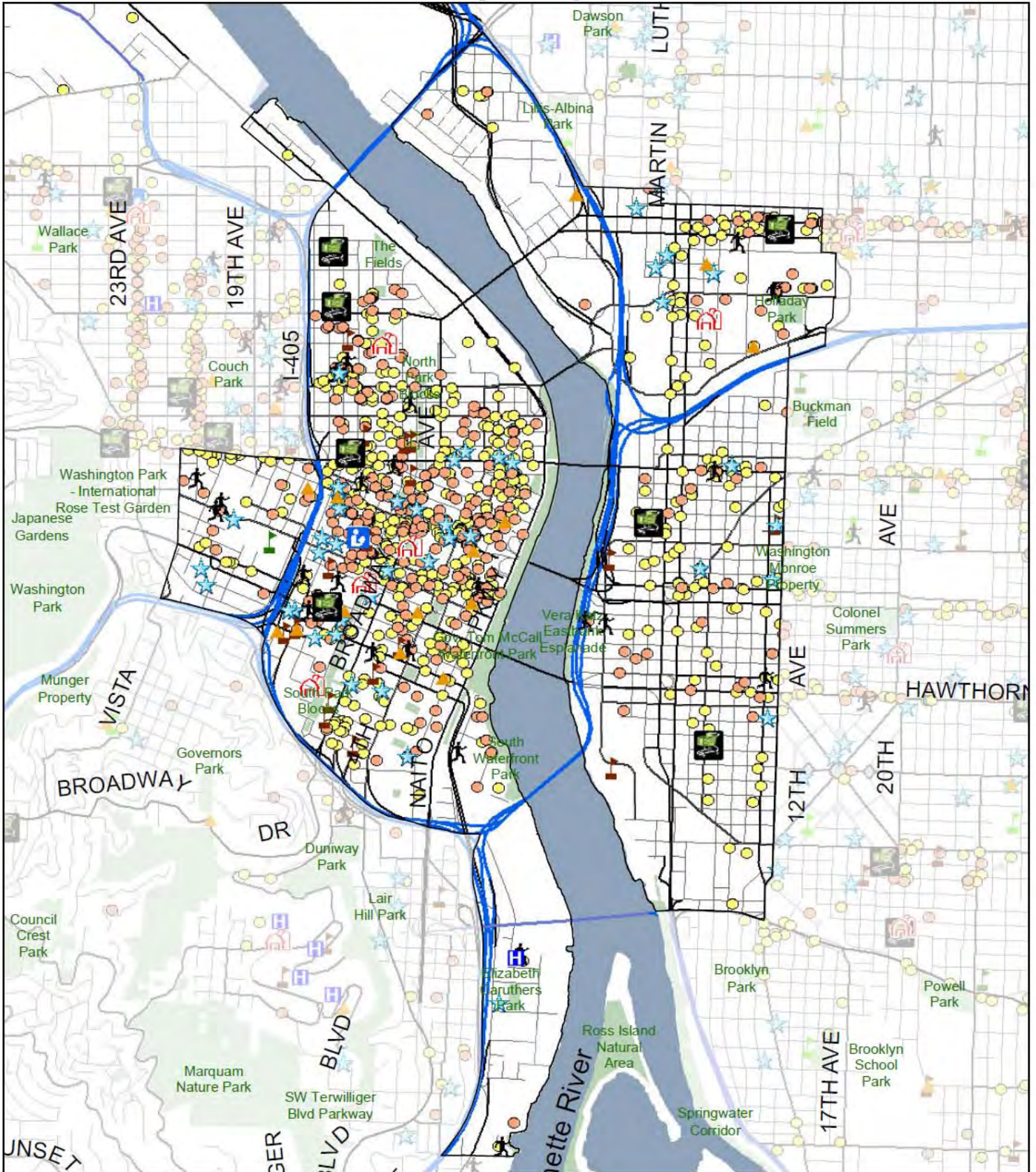
Within 1/4 mile of a frequent service transit stop: 76%

Neighborhood and Business Associations

Neighborhood Associations: Downtown, Pearl, Old Town / Chinatown, Lloyd neighborhoods, and parts of South Portland, Goose Hollow, Eliot, Kerns, Buckman and Hosford-Abernethy

Business Associations: Goose Hollow, Old Town China Town, and Pearl District business associations, Lloyd District Community Association, Portland Business Alliance, and Central Eastside Industrial Council

Central City Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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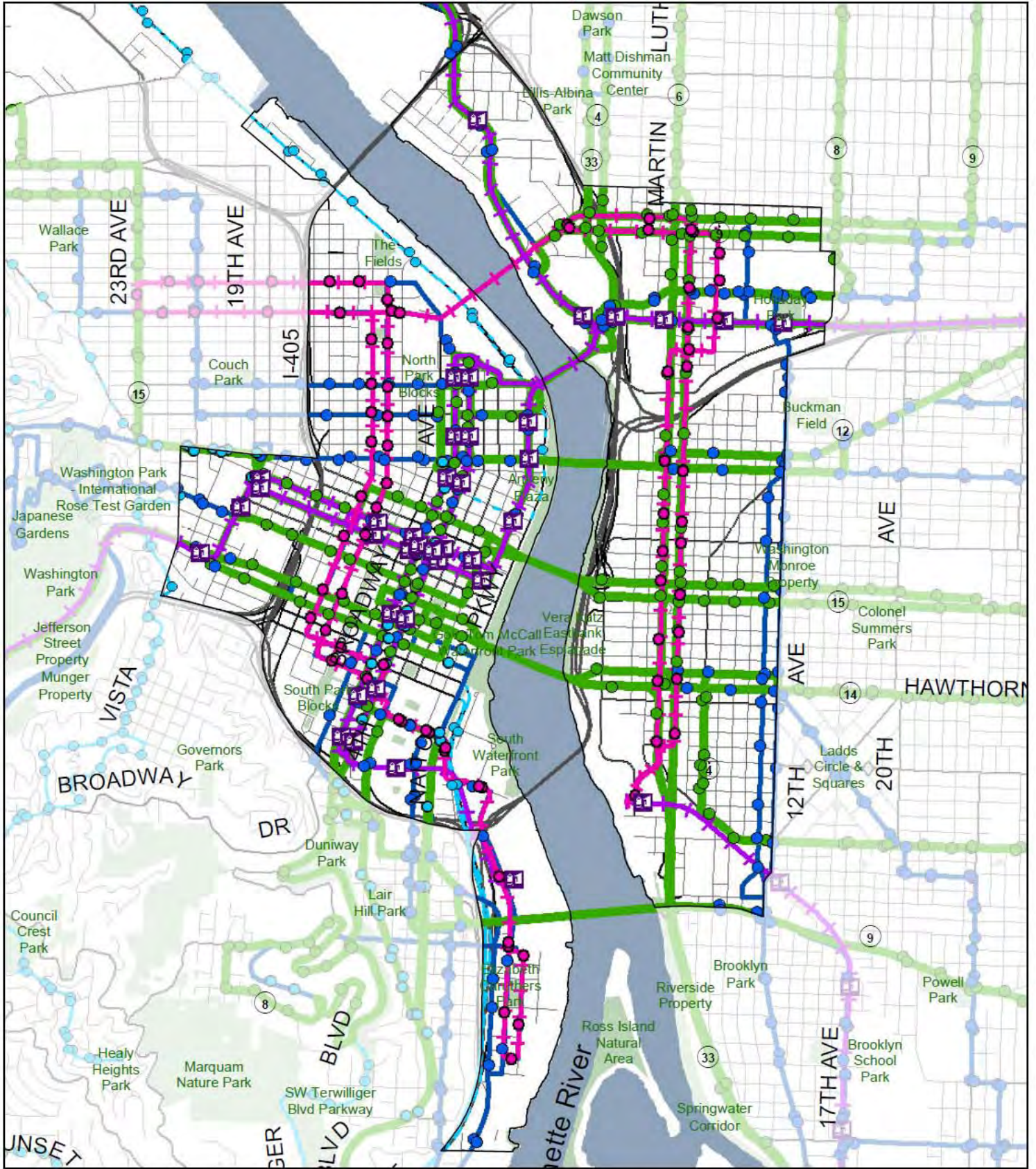


March 25, 2011

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commercial data from InfoUSA 2008

Central City Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



0 750 1,500 3,000 Feet

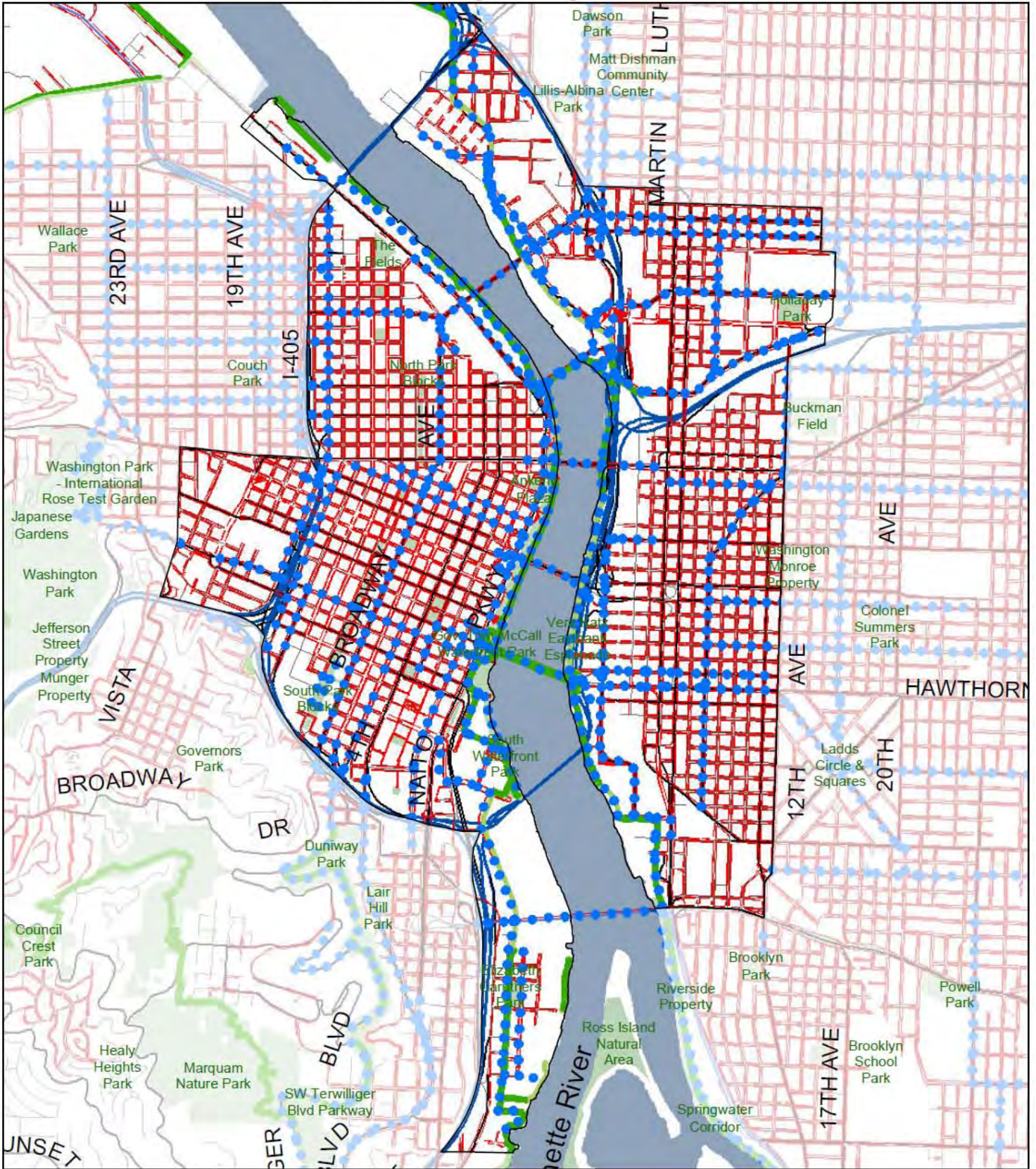


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May 12, 2011

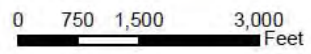
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Central City Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

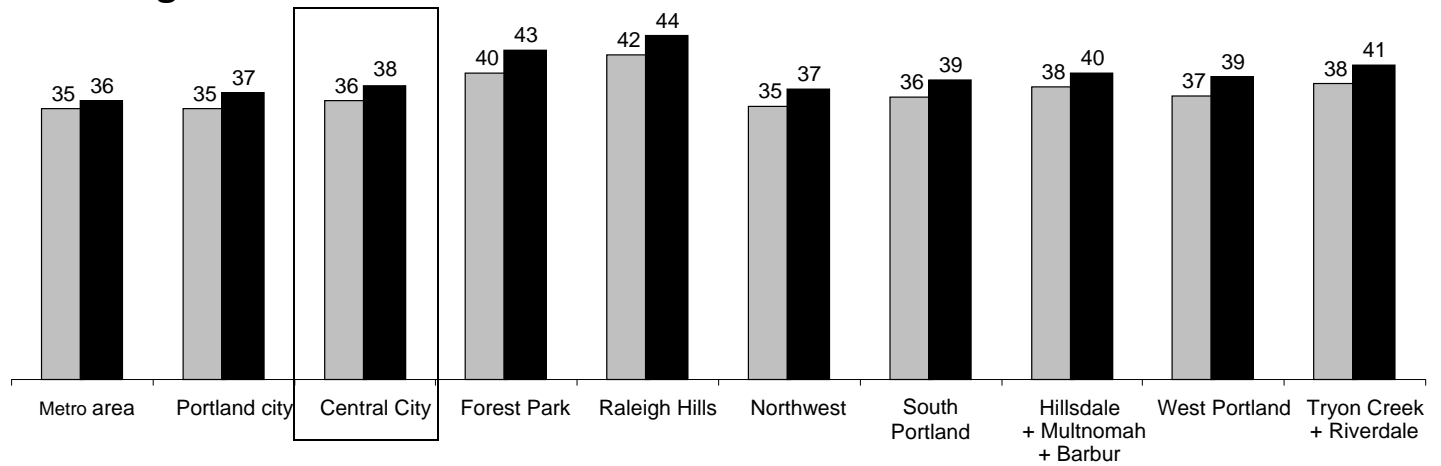
Central City Analysis Area Demographics (2000 – 2010)

Population

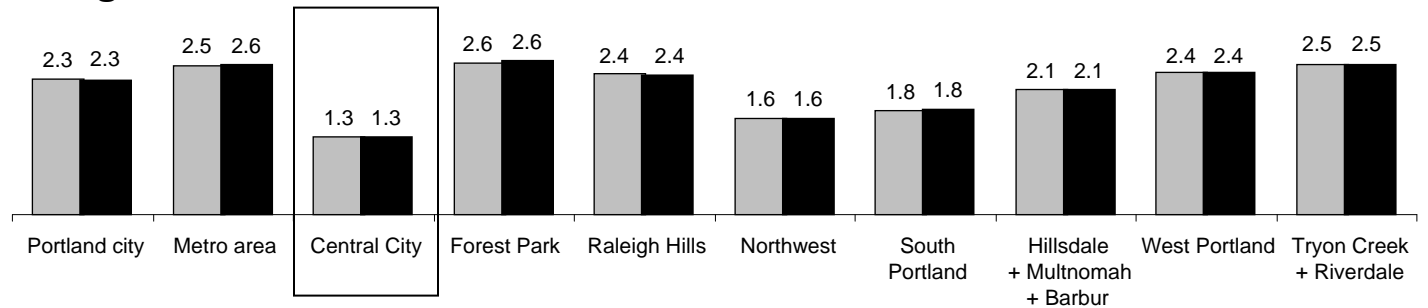
	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	2,226,000	585,000	30,931	8,424	15,446	21,794	8,560	19,601	10,836	9,668
2000	1,927,881	529,121	19,202	5,279	15,485	20,014	8,136	18,674	10,481	8,884
% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

■ 2000 ■ 2010

Median Age

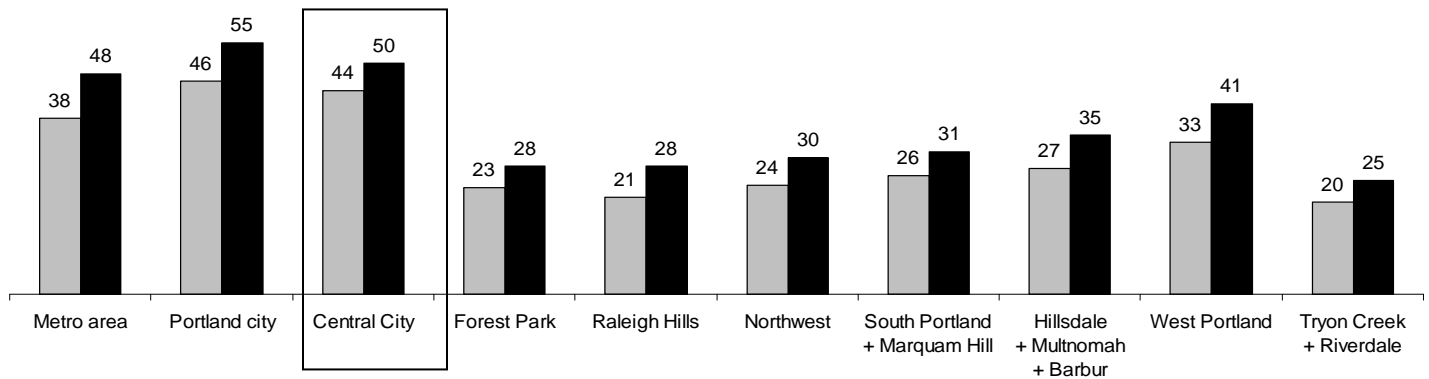


Average Household Size

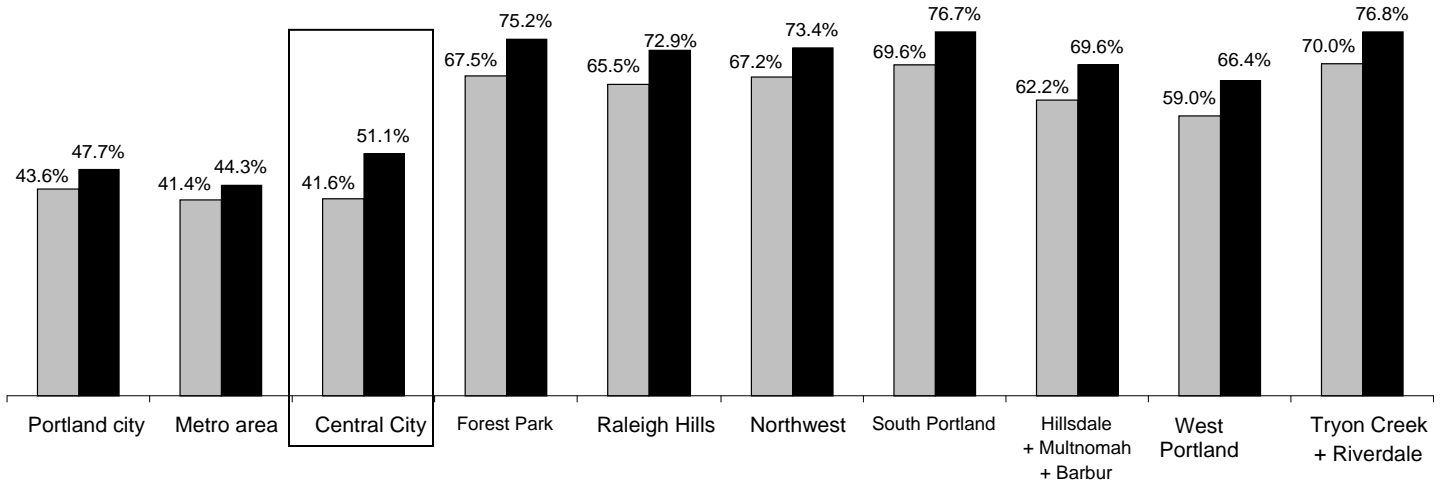


Diversity Index

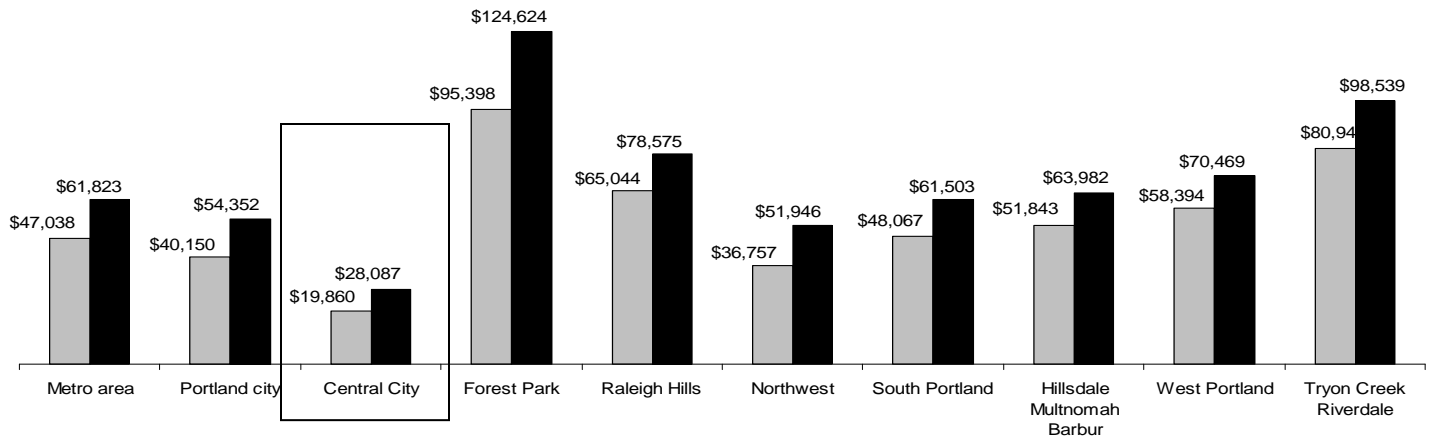
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



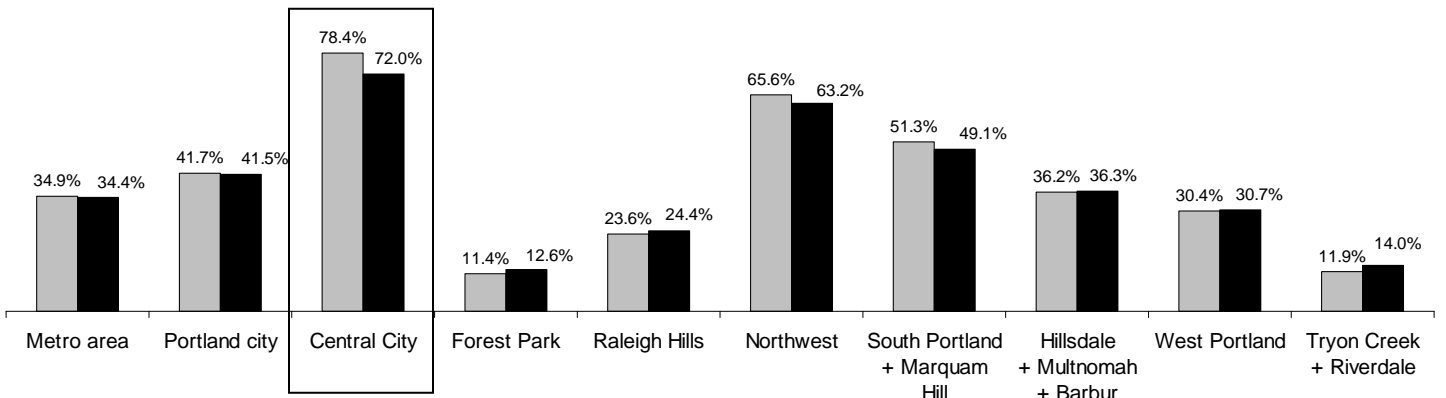
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



Central City Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

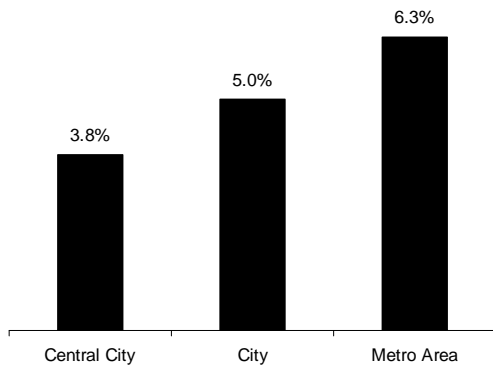
Central City	City	Metro Area
13,947,314	51,937,895	107,875,146

OFFICE SPACE

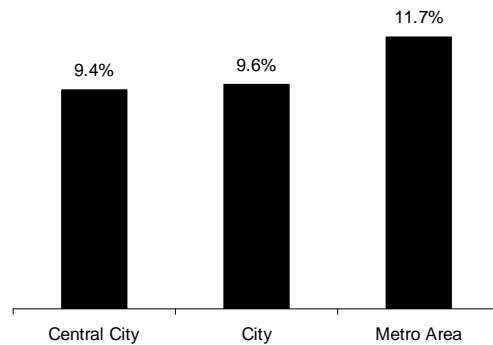
Square Feet

Central City	City	Metro Area
31,960,133	54,348,765	92,465,455

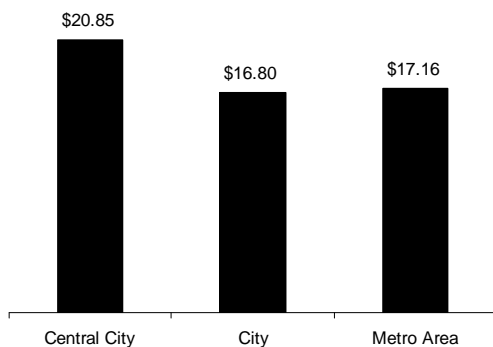
Retail Vacancy



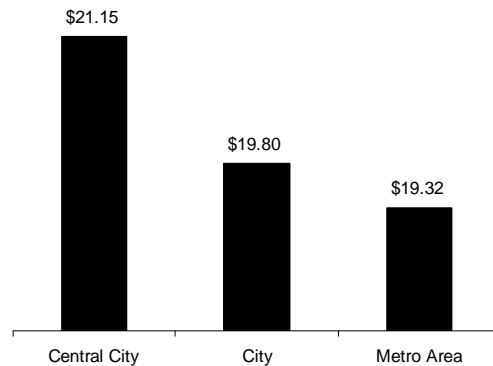
Office Vacancy



Retail Rents



Office Rents



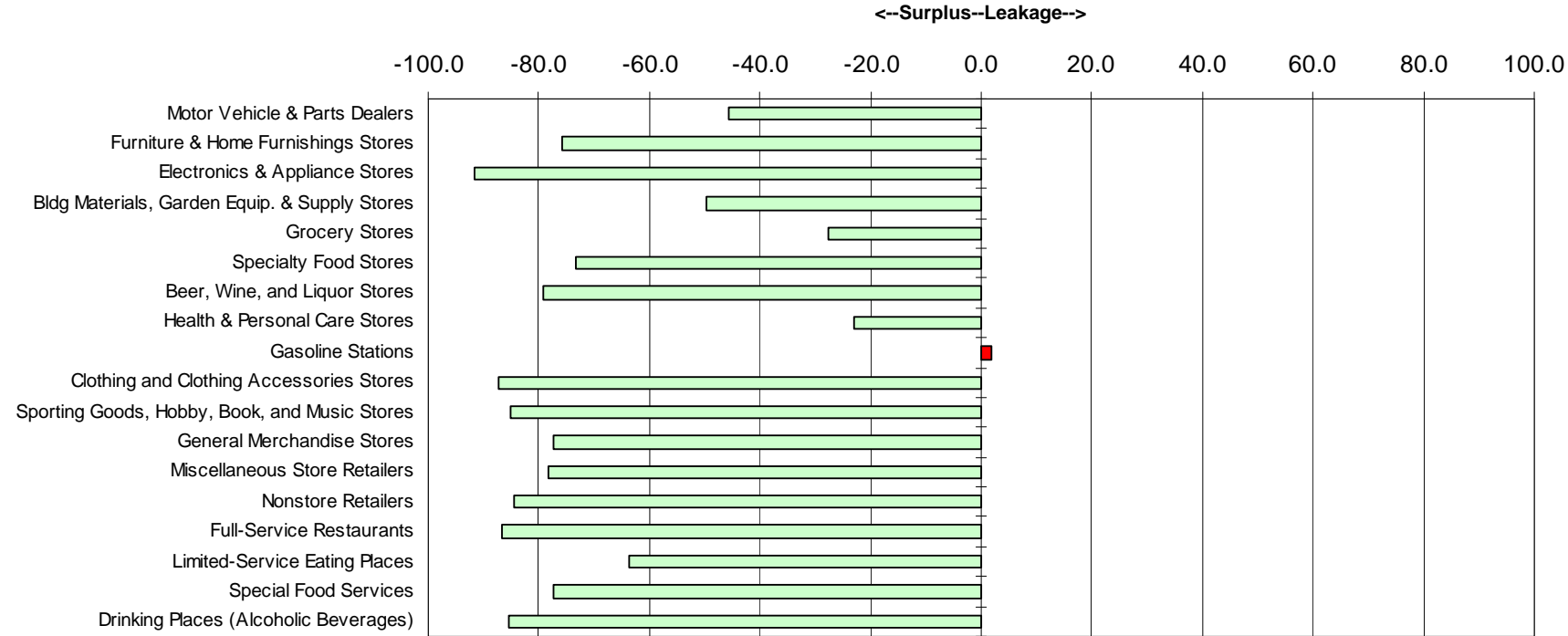
Central City Analysis Area

Retail Market Profile

Retail Gap = \$1.4 billion (surplus)

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$311,444,659	\$1,752,714,621	-\$1,441,269,962	-69.8	1,703
Total Retail Trade (NAICS 44-45)	\$263,690,952	\$1,333,685,102	-\$1,069,994,150	-67.0	1,103
Total Food & Drink (NAICS 722)	\$47,753,707	\$419,029,519	-\$371,275,812	-79.5	600

The “Retail Gap” is a difference between the potential spending in an area and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”



Central City Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

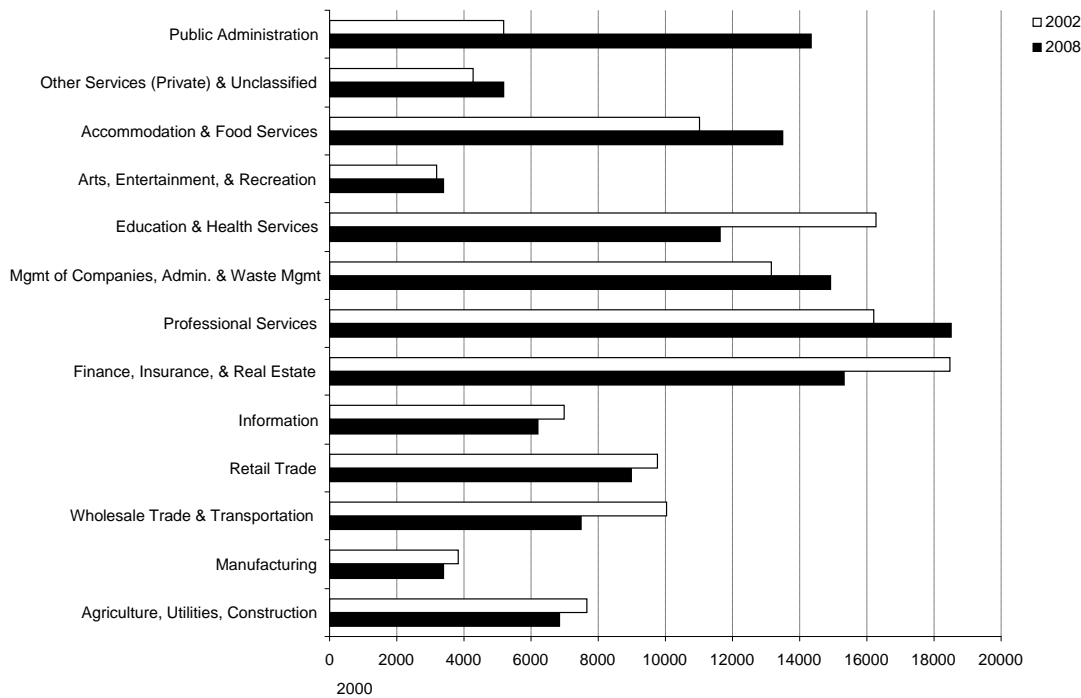
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

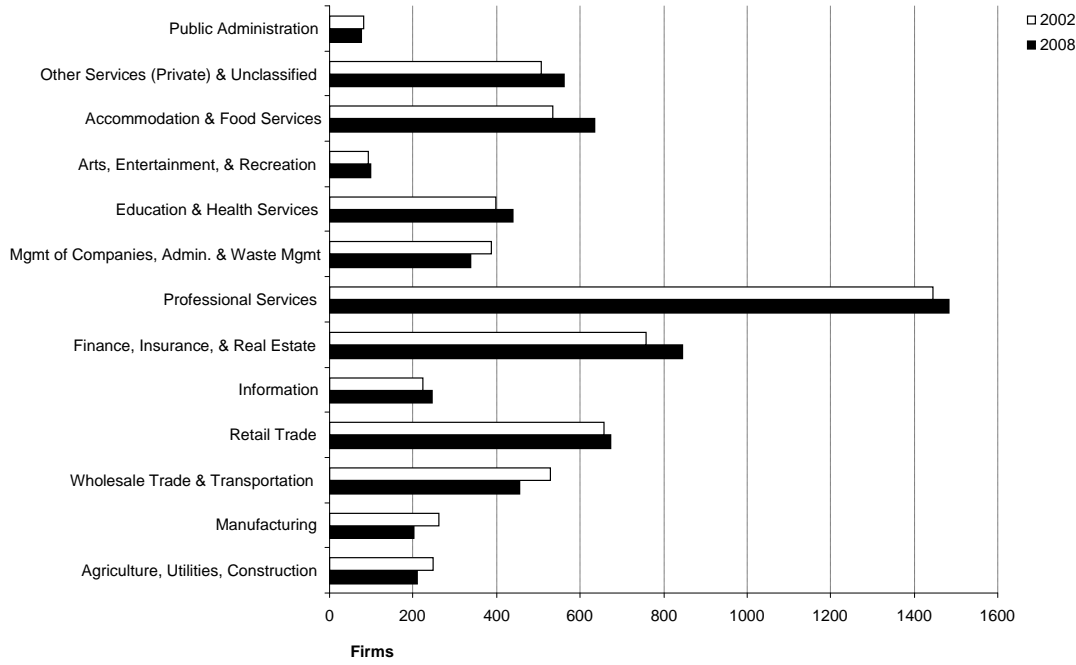
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	126,040	129,670	+3,360
Total Firms	6,122	6,260	+138
Average Annual Wages	\$46,002	\$55,941	+\$9,939

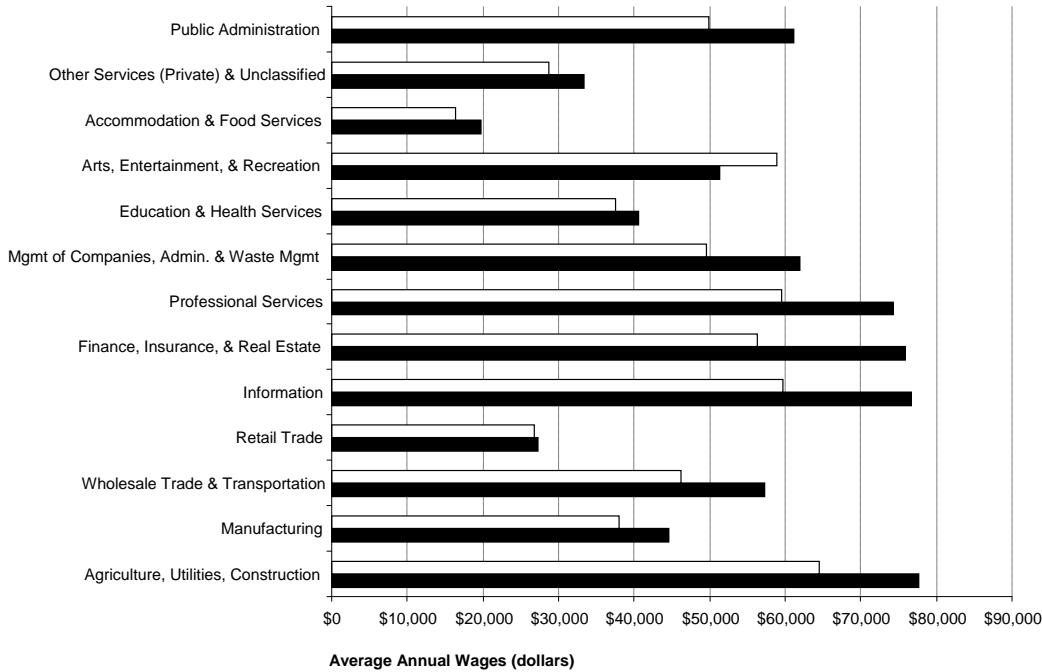
Total Jobs



Total Firms



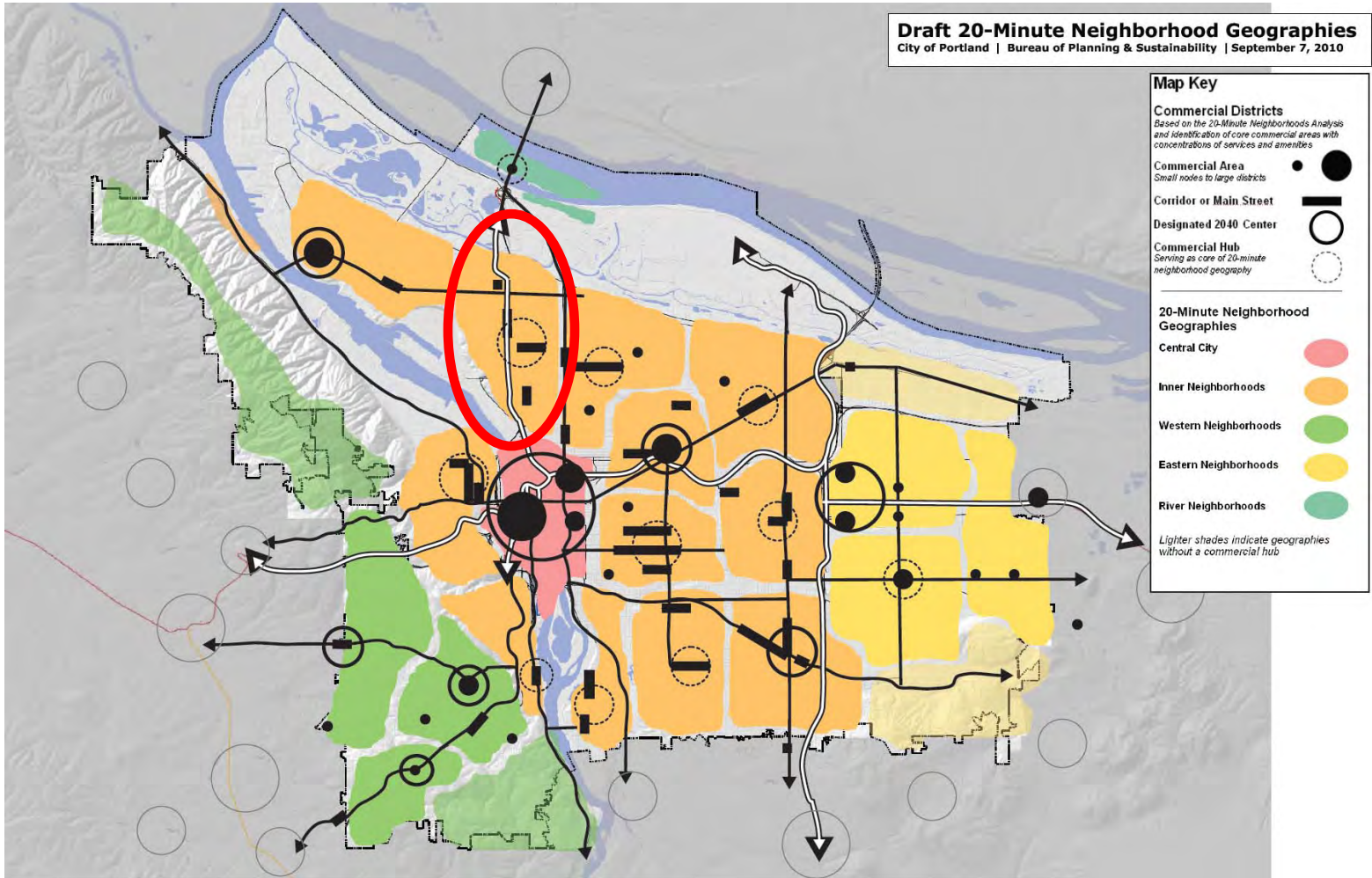
Average Annual Wages



Interstate Corridor Analysis Area

Including the Arbor Lodge, Boise, Humboldt, Kenton, Overlook, Piedmont neighborhoods, and part of the Eliot neighborhood

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Interstate Corridor Analysis Area

Services and Amenities

Population: 33,900 people (14,400 households)
Land Area: 5.2 square miles (6,500 people per sq. mile)

Commercial Districts

The area has a number of distinct commercial districts of varying sizes, mostly in the form of commercial main streets or corridors. Concentrations of commercial services are located along Lombard west of the I-5 freeway, along Killingsworth clustered near Portland Community College's Cascade campus, and in the historic Kenton and Mississippi Avenue main street districts. There are also smaller clusterings of commercial services along Interstate Avenue (which has the area's two full-service grocery stores and is served by light rail transit) and along the Vancouver-Williams corridor.

Grocery stores: 2

Community Amenities

Community Centers: 2 (Matt Dishman [full service] and Peninsula Park community centers)

Libraries: 2 (North Portland and Kenton libraries)

Parks and Open Spaces: 90 acres - including Peninsula, Farragut, Kenton, Arbor Lodge, Madrona, Overlook, Unthank, Dawson, and Lillis-Albina parks

Tree Canopy Coverage: 22%

Public Schools: 1 high school (Jefferson)

6 K-8 schools (Chief Joseph Elementary, and the Beach, Boise-Eliot, Humboldt, Ockley Green Arts, and Peninsula K-8 schools) and the Tubman Leadership Academy for Young Women (6-12)

Colleges (campus): 1 (Portland Community College Cascade Campus)

Hospitals: 2 (Kaiser Interstate, Legacy Emanuel)

Farmers Markets: 1 (Interstate Farmers Market)

Transit Centers/Stations: 6 (North Lombard Transit Center and Interstate light rail stations at Denver, Rosa Parks, Killingsworth, Going and Overlook/Fremont)

Walkable Access Score: 63 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

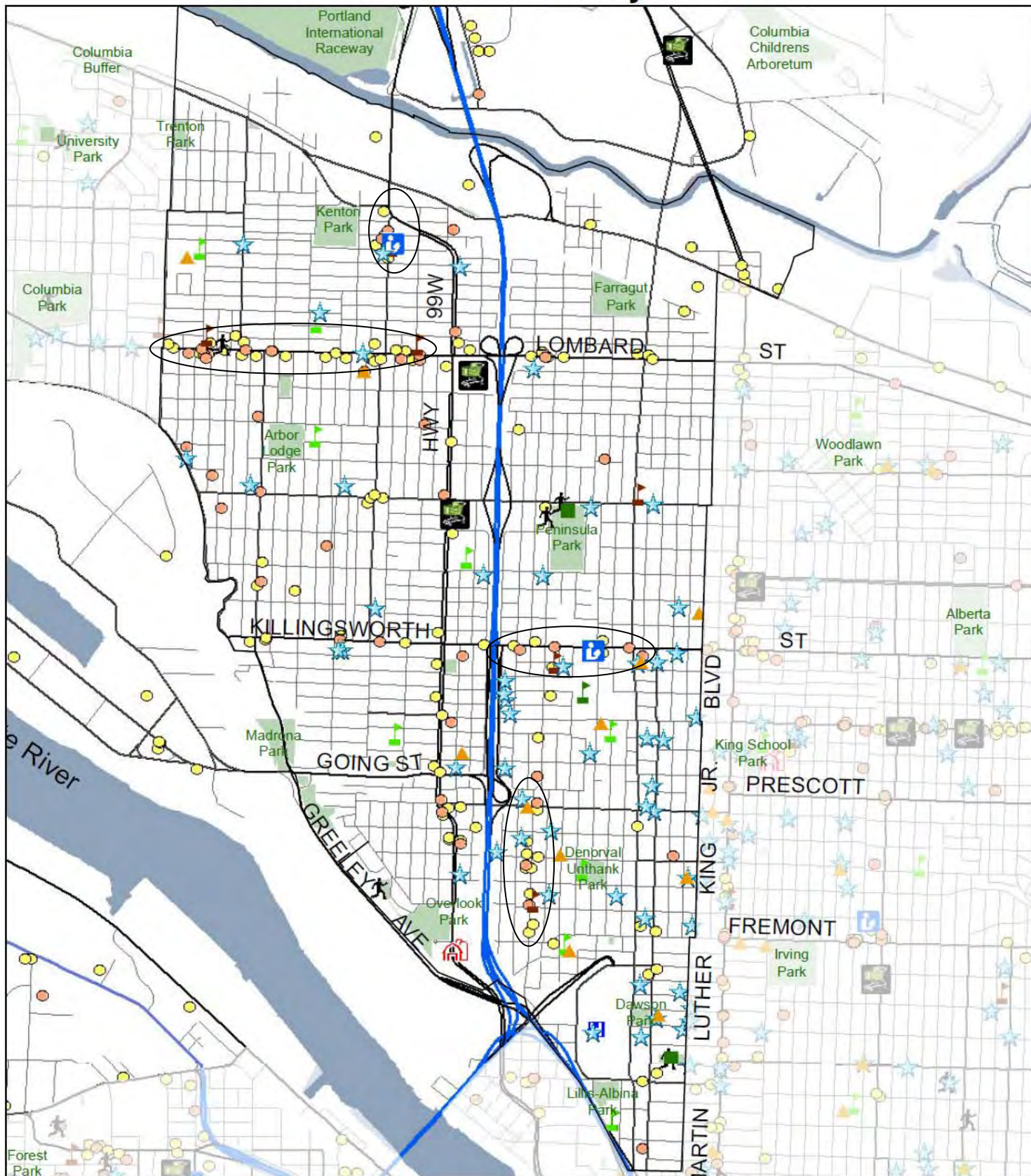
Within 1/2 mile of a park:	97%
Within 1/2 mile of a public elementary school:	58%
Within 3 miles of a full-service community center:	100%
Within 1/2 mile of a full-service grocery store:	16%
Within 1/4 mile of a frequent service transit stop:	75%

Neighborhood and Business Associations

Neighborhood Associations: Arbor Lodge, Boise, Eliot, Humboldt, Kenton, Overlook, and Piedmont

Business Associations: Interstate Corridor, Kenton, North-Northeast, and North Portland business associations, and the Historic Mississippi District Association

Interstate Corridor Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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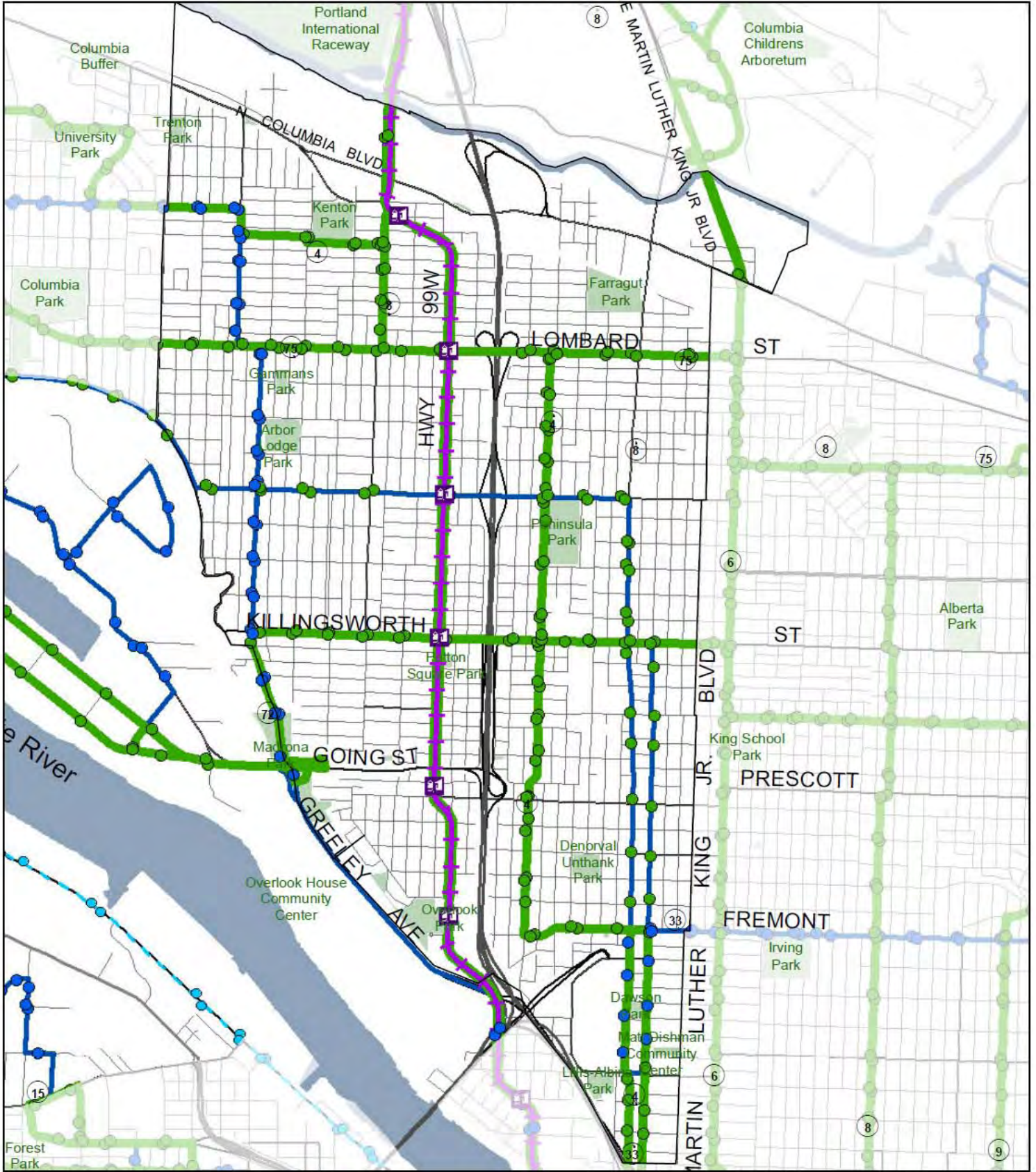
0 750 1,500 3,000 Feet

March 25, 2011

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commercial data from InfoUSA 2008

Interstate Corridor Analysis Area



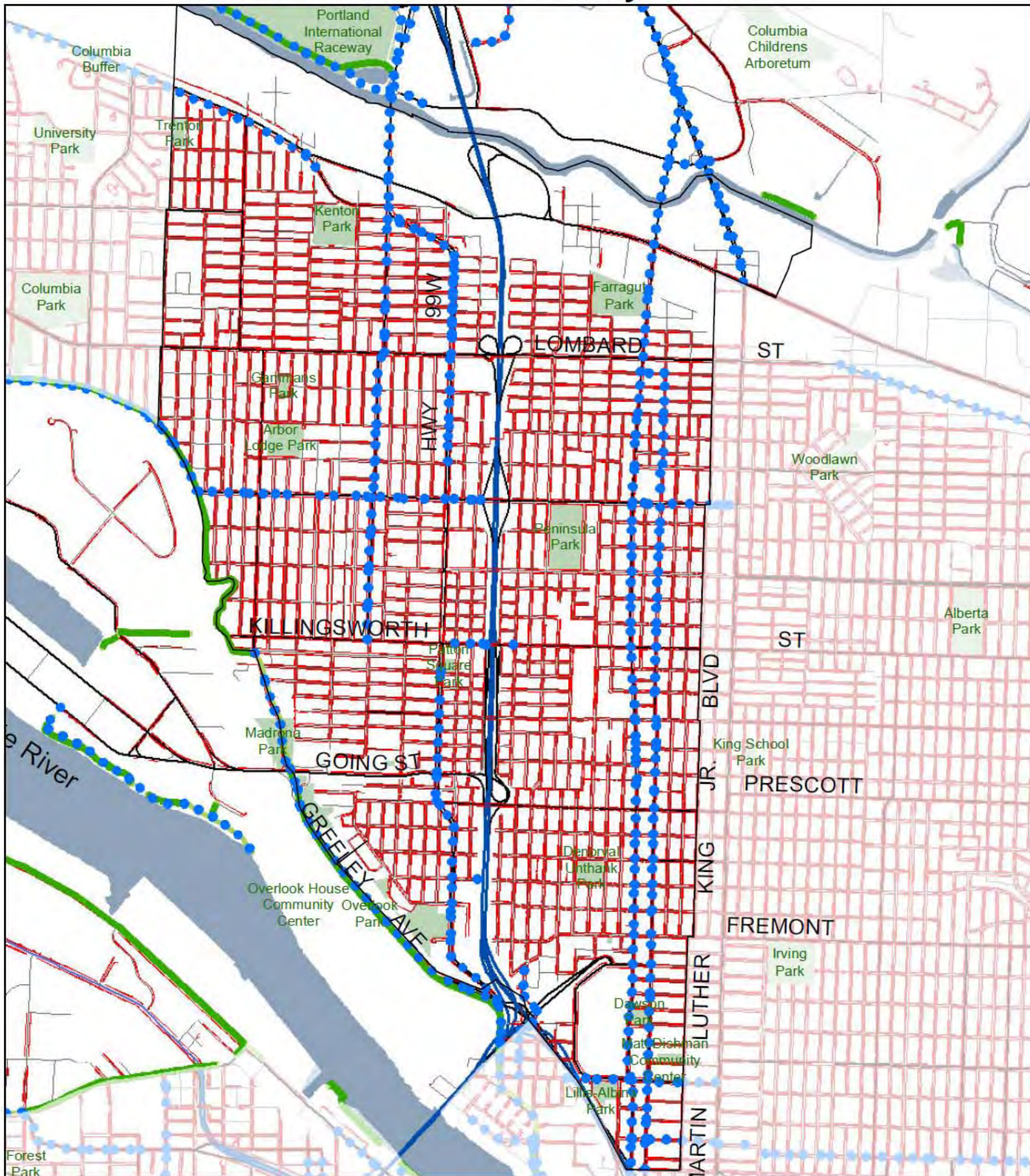
Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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Interstate Corridor Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



0 750 1,500 3,000 Feet



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March 25, 2011

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Interstate Corridor Analysis Area

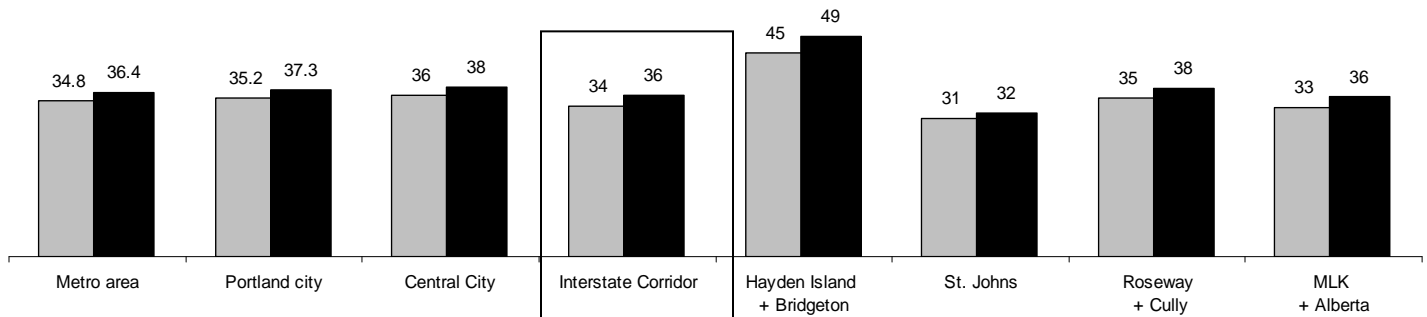
Demographics (2000 – 2010)

Population

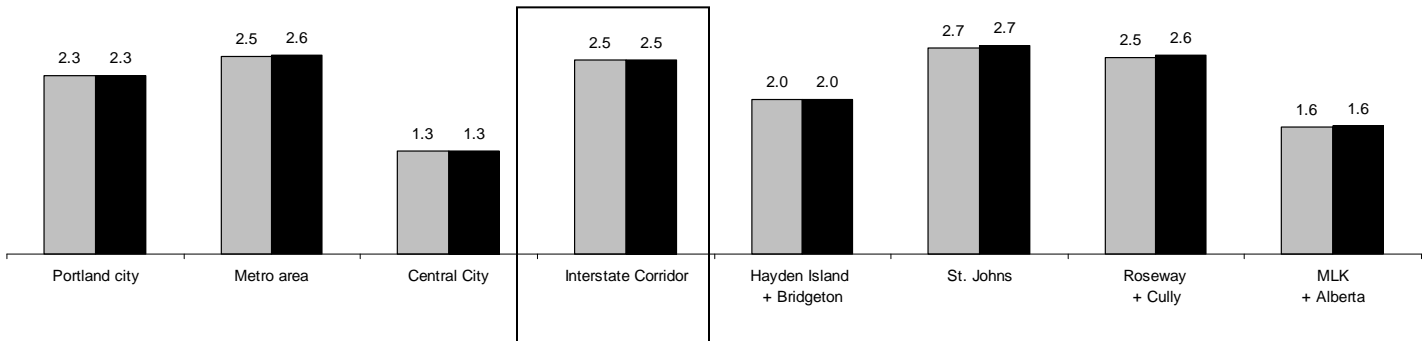
	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island Bridgeton	St. Johns	Roseway Cully	MLK Alberta
2010	2,226,000	589,000	30,931	33,855	4,223	33,262	34,333	37,215
2000	1,927,881	529,121	19,202	32,695	2,912	29,800	33,792	36,763
% change	12.9%	10.6%	61.1%	3.5%	45.0%	11.6%	1.6%	1.2%

■ 2000 ■ 2010

Median Age

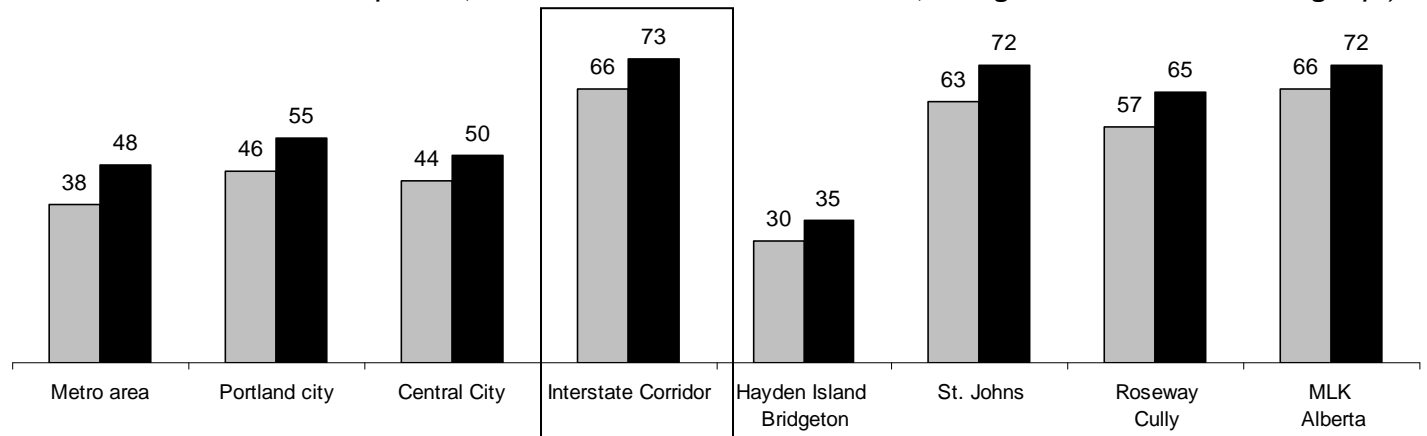


Average Household Size

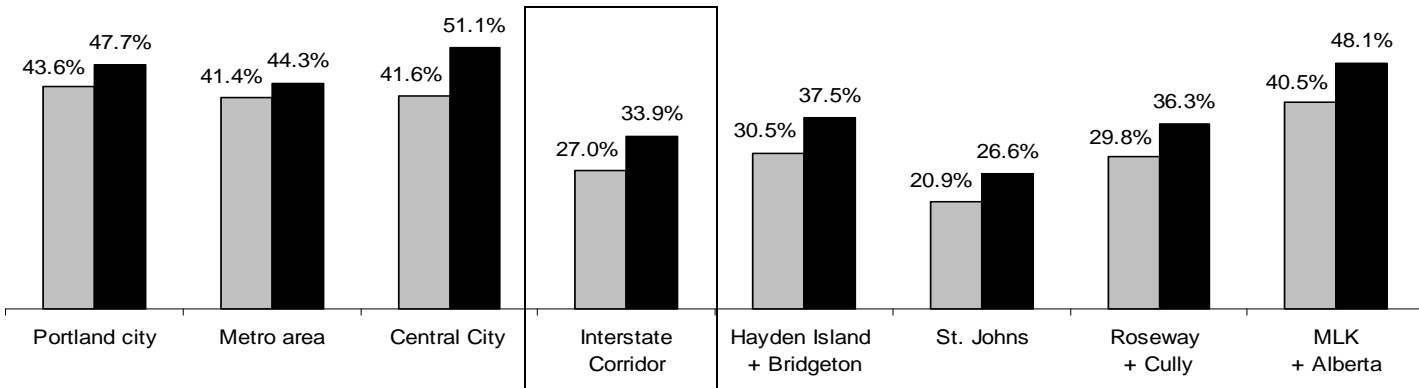


Diversity Index

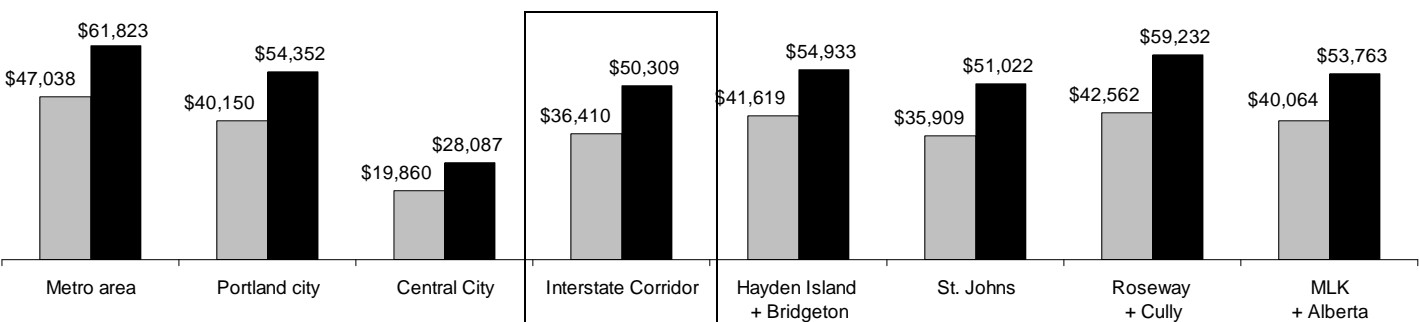
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



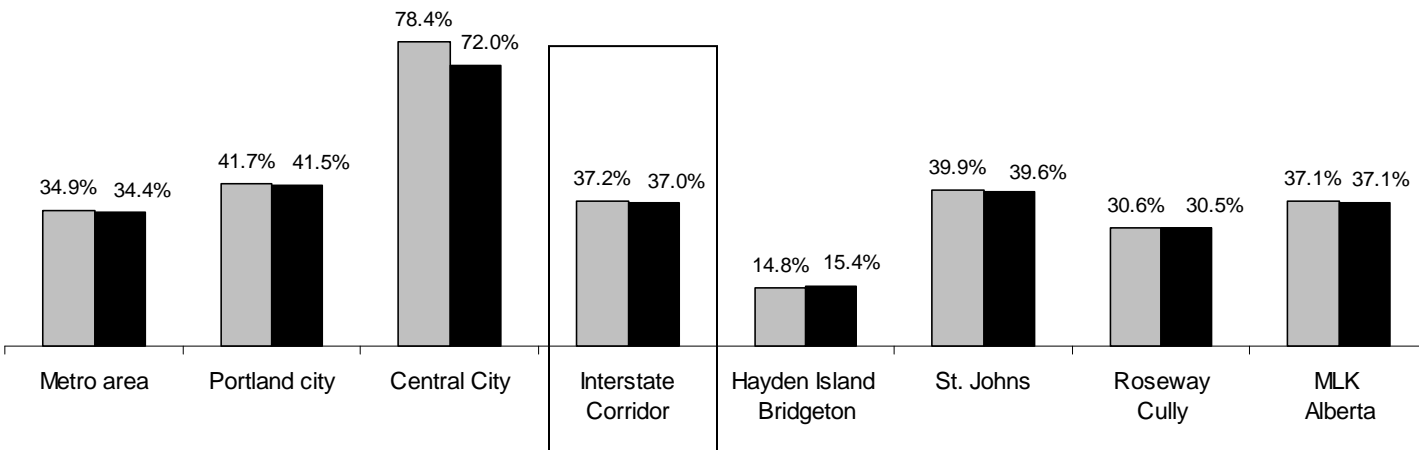
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island + Bridgeton	St. Johns	Roseway + Cully	MLK + Alberta
2010	273,500	253,184	400,314	197,371	79,875	\$192,095	223,725	\$236,154
2000	168,347	154,721	250,566	127,233	61,081	\$122,775	139,966	\$147,306
% change	62.5%	63.6%	59.8%	55.1%	30.8%	56.5%	59.8%	60.3%

Percent of Renters of Occupied Housing Units



Interstate Corridor Analysis Area

Commercial Real Estate Indicators

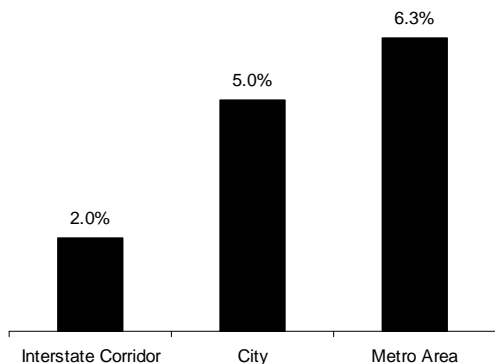
Retail and Commercial Real Estate data through 9-16-2010
 Source: *COSTAR*

RETAIL

Square Feet

Interstate	City	Metro Area
1,661,047	51,937,895	107,875,146

Retail Vacancy



Retail Rents

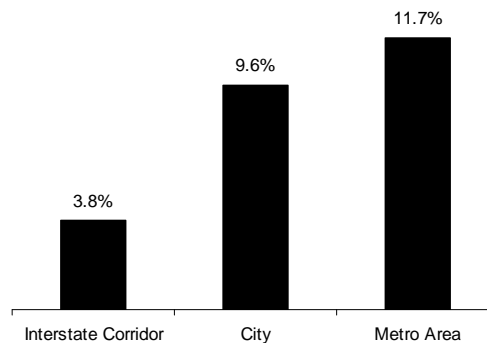


OFFICE SPACE

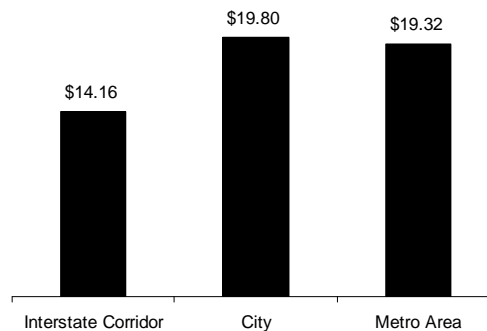
Square Feet

Interstate	City	Metro Area
846,502	54,348,765	92,465,455

Office Vacancy



Office Rents



Interstate Corridor Analysis Area

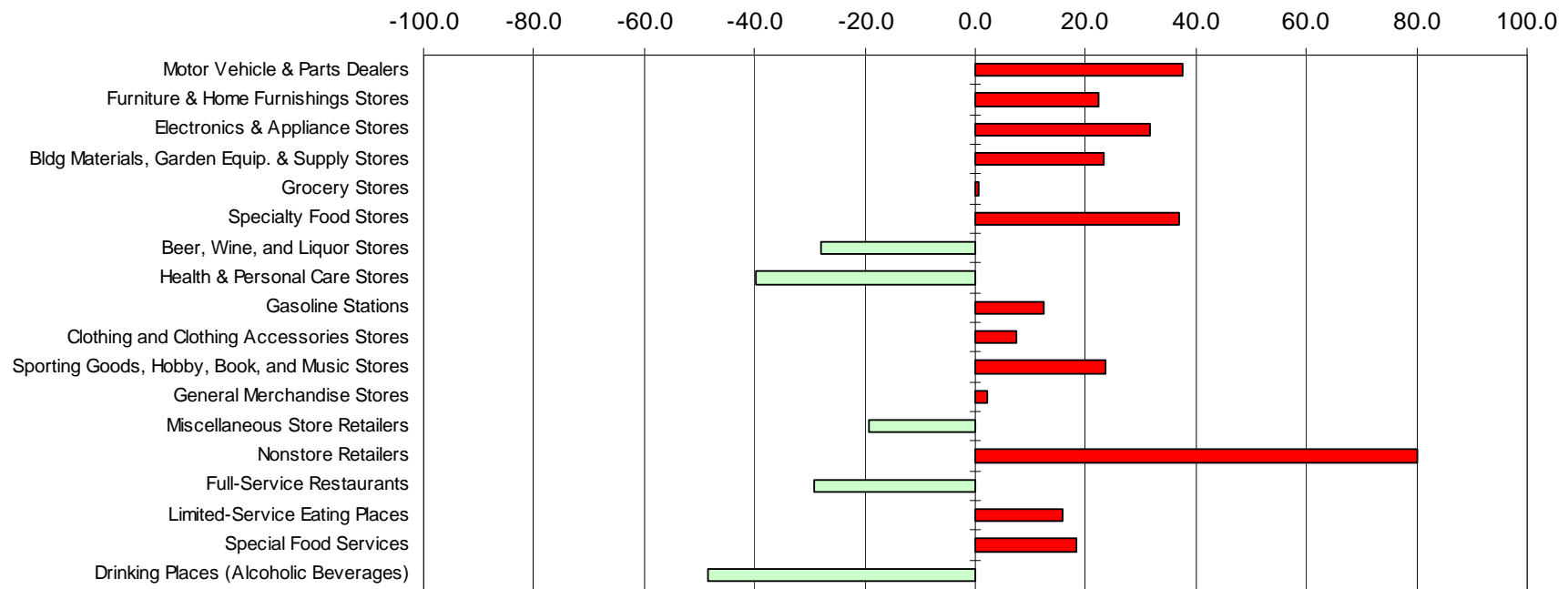
Retail Market Profile

Retail Gap = \$37 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$286,154,032	\$249,087,847	\$37,066,185	6.9	290
Total Retail Trade (NAICS 44-45)	\$243,944,250	\$194,664,430	\$49,279,820	11.2	182
Total Food & Drink (NAICS 722)	\$42,209,782	\$54,423,417	-\$12,213,635	-12.6	108

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."

<--Surplus--Leakage-->



Interstate Corridor Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

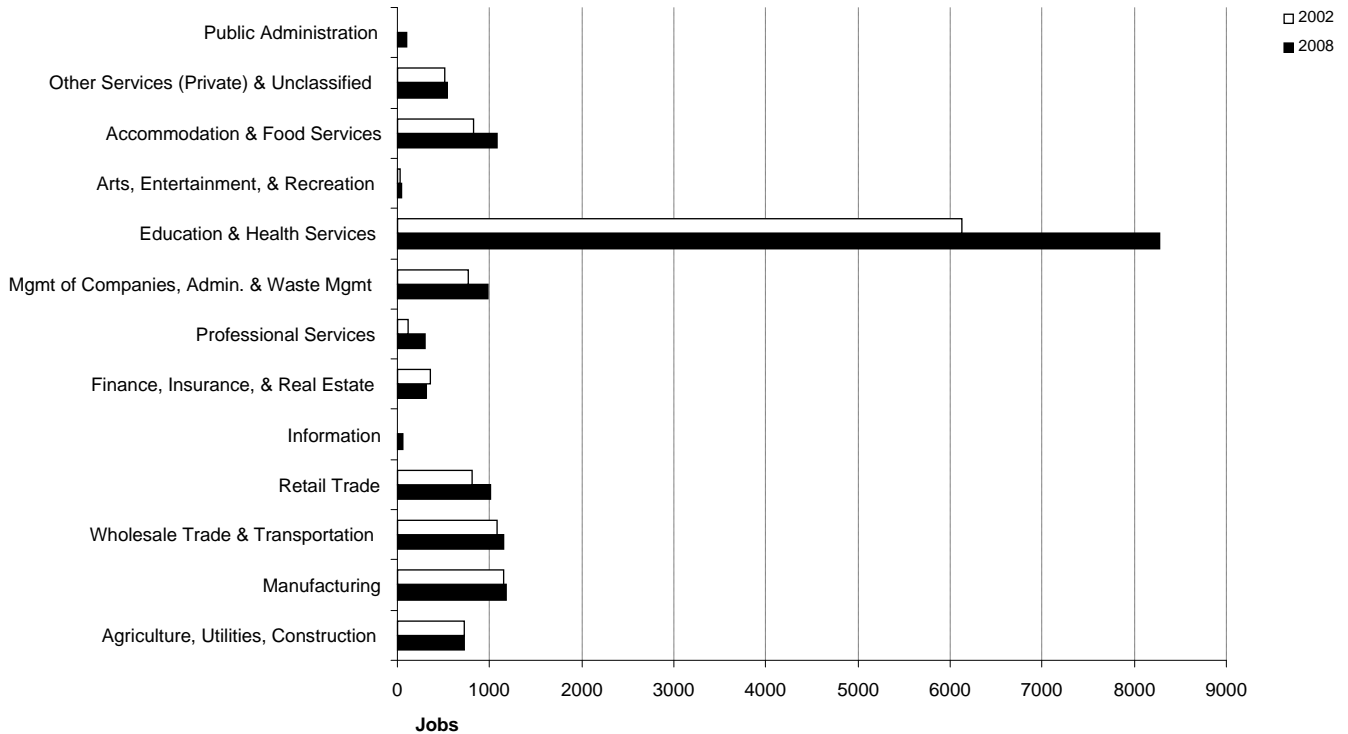
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

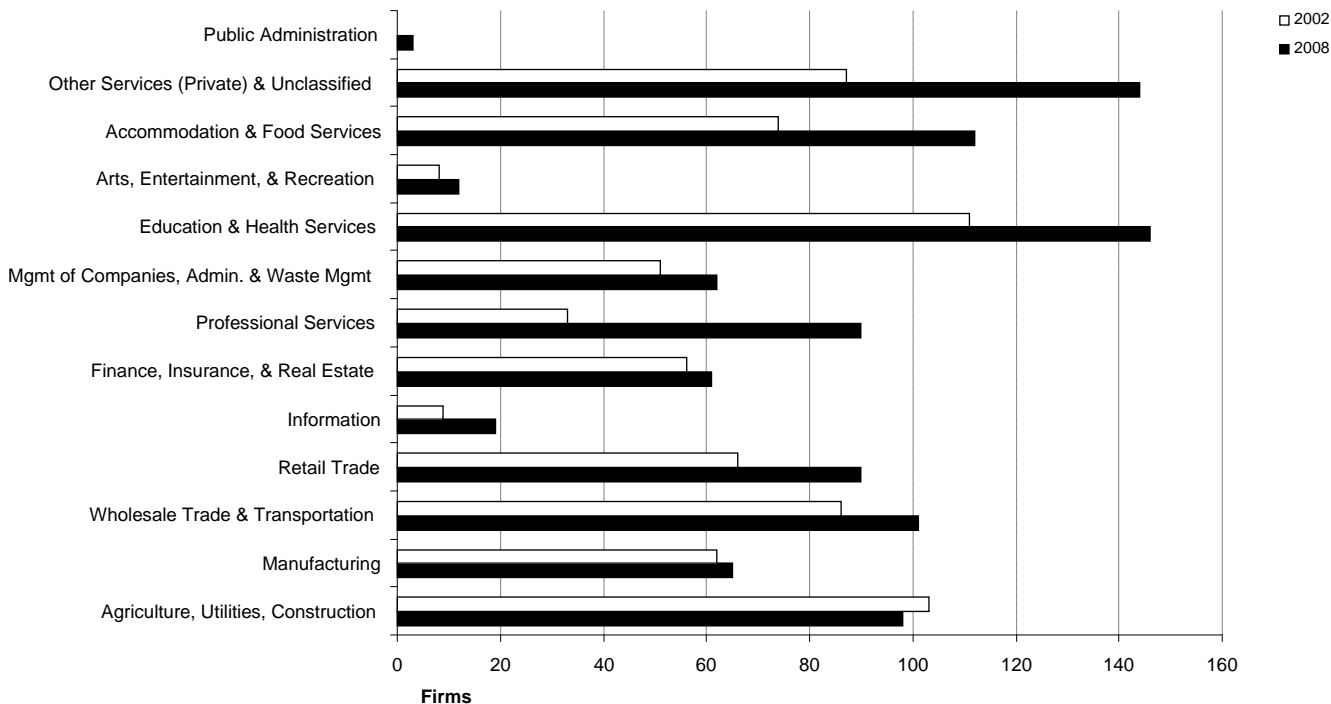
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	12,518	15,652	+3,314
Total Firms	746	1,003	+257
Average Annual Wages	\$37,644	\$44,613	+\$6,969

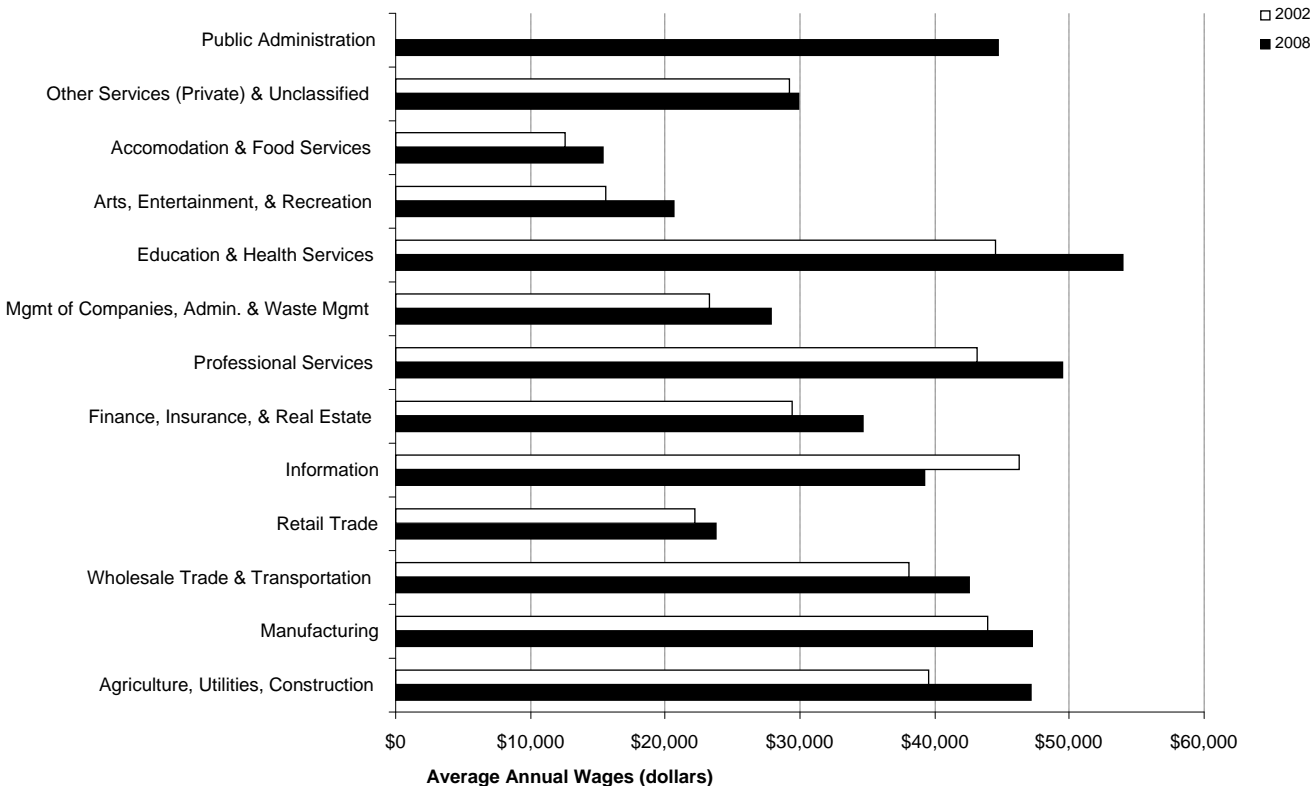
Total Jobs



Total Firms



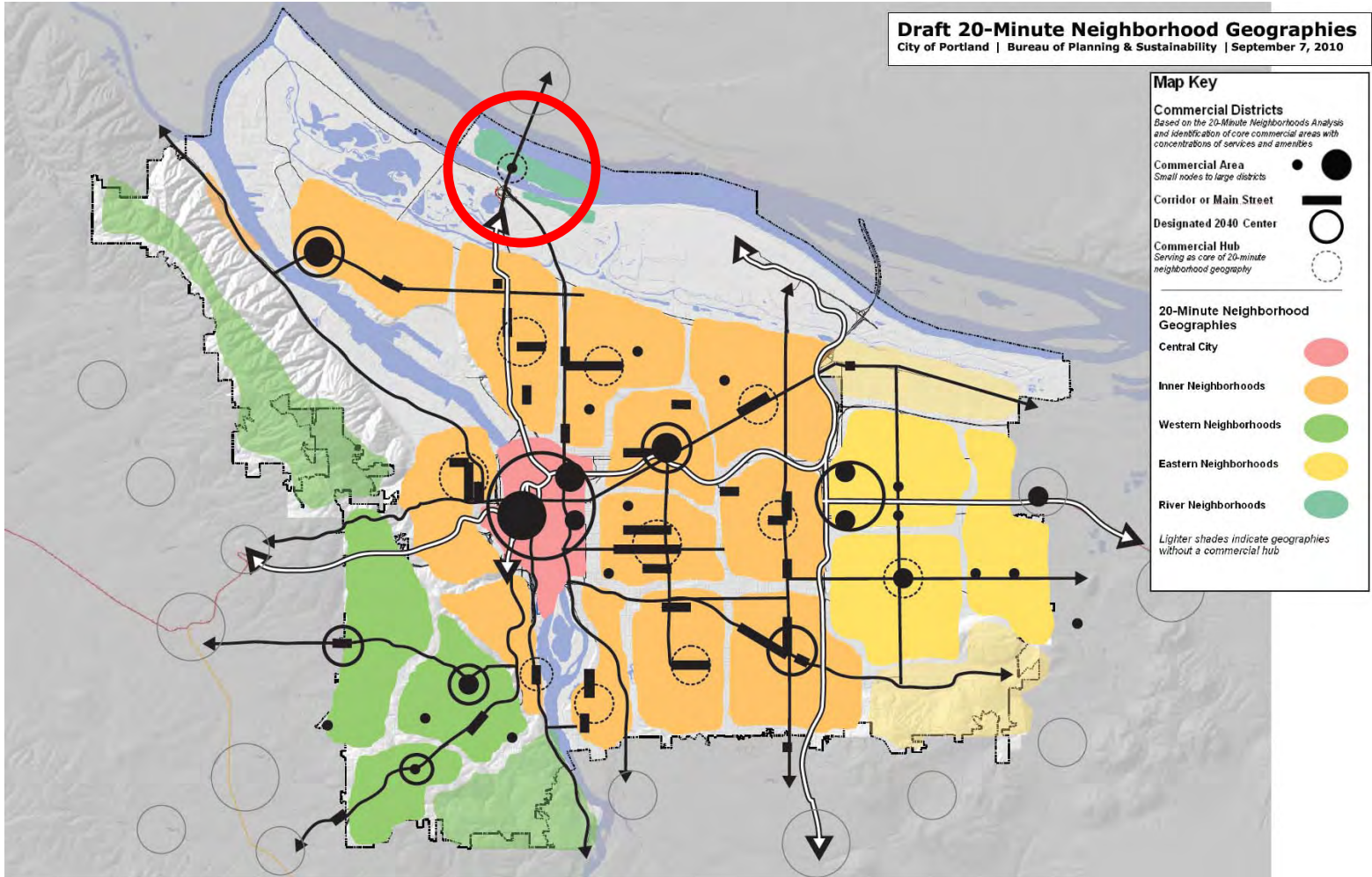
Average Annual Wages



Hayden Island-Bridgeton Analysis Area

Including the Hayden Island and East Columbia neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Hayden Island-Bridgeton Analysis Area

Services and Amenities

Population: 4,200 people (2,500 households)
Land Area: 2.0 square miles (2,100 people per sq. mile)

Commercial Districts

The area's primary concentrations of commercial services are at the Jantzen Beach and Delta Park shopping centers.

Grocery stores: 3

Community Amenities

Community Centers: None

Libraries: None

Parks and Open Spaces: 30 acres - including East Delta Park and the Columbia Childrens Arboretum. Also located in the area is Heron Lakes Golf Course and Portland International Raceway.

Tree Canopy Coverage: 18%

Public Schools: None

Colleges (campus): None

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: None

Walkable Access Score: 26 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

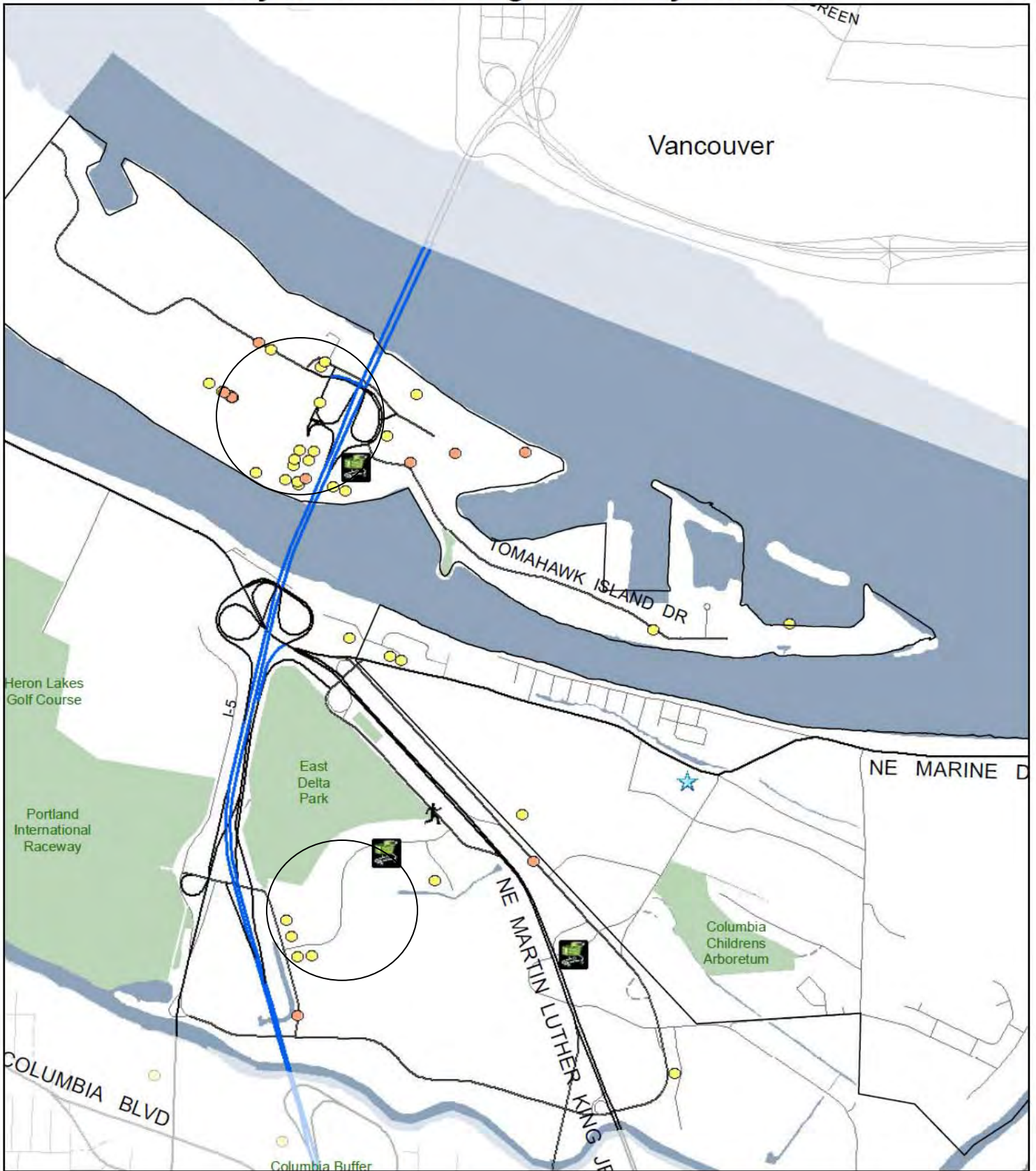
Within 1/2 mile of a park:	26%
Within 1/2 mile of a public elementary school:	0%
Within 3 miles of a full-service community center:	0%
Within 1/2 mile of a full-service grocery store:	12%
Within 1/4 mile of a frequent service transit stop:	0%

Neighborhood and Business Associations

Neighborhood Associations: Hayden Island and East Columbia

Business Associations: Columbia Corridor Association

Hayden Island-Bridgeton Analysis Area



Services and Amenities

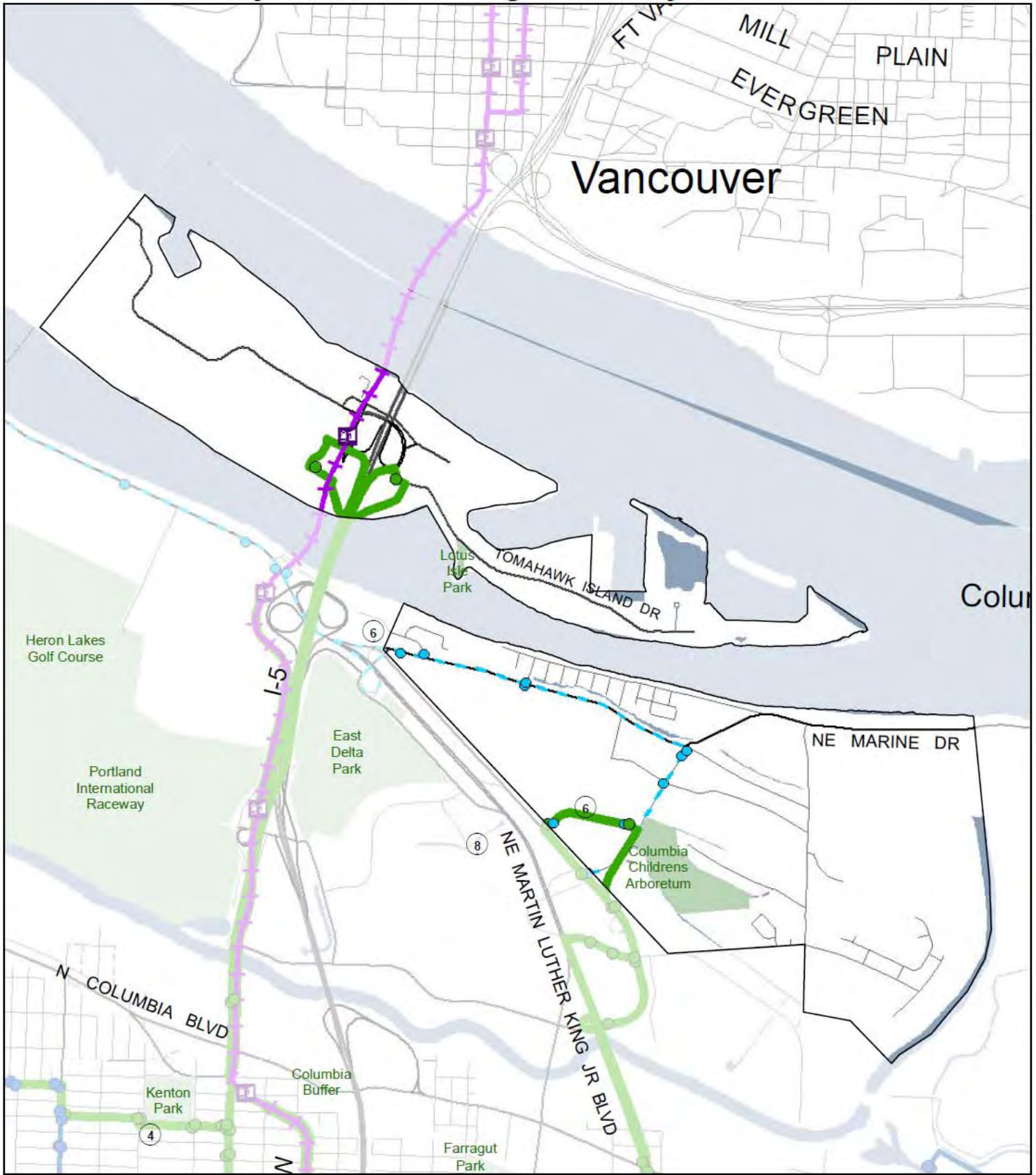
- arterials_clark_county
- Type 1 Commercial
- Type 2 Commercial
- 🏃 Fitness Centers
- 🛒 Grocery Stores
- ★ Places of Worship
- 🏠 Farmers Markets
- 📖 Libraries
- 🏠 Community Centers
- 🎓 Public HS
- 🎓 Public K-8
- 🎓 Private Schools
- 🏠 Daycare Centers



City of Portland Bureau of
Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director

750 1,500 3,000 Feet March 25, 2011

Hayden Island-Bridgeton Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



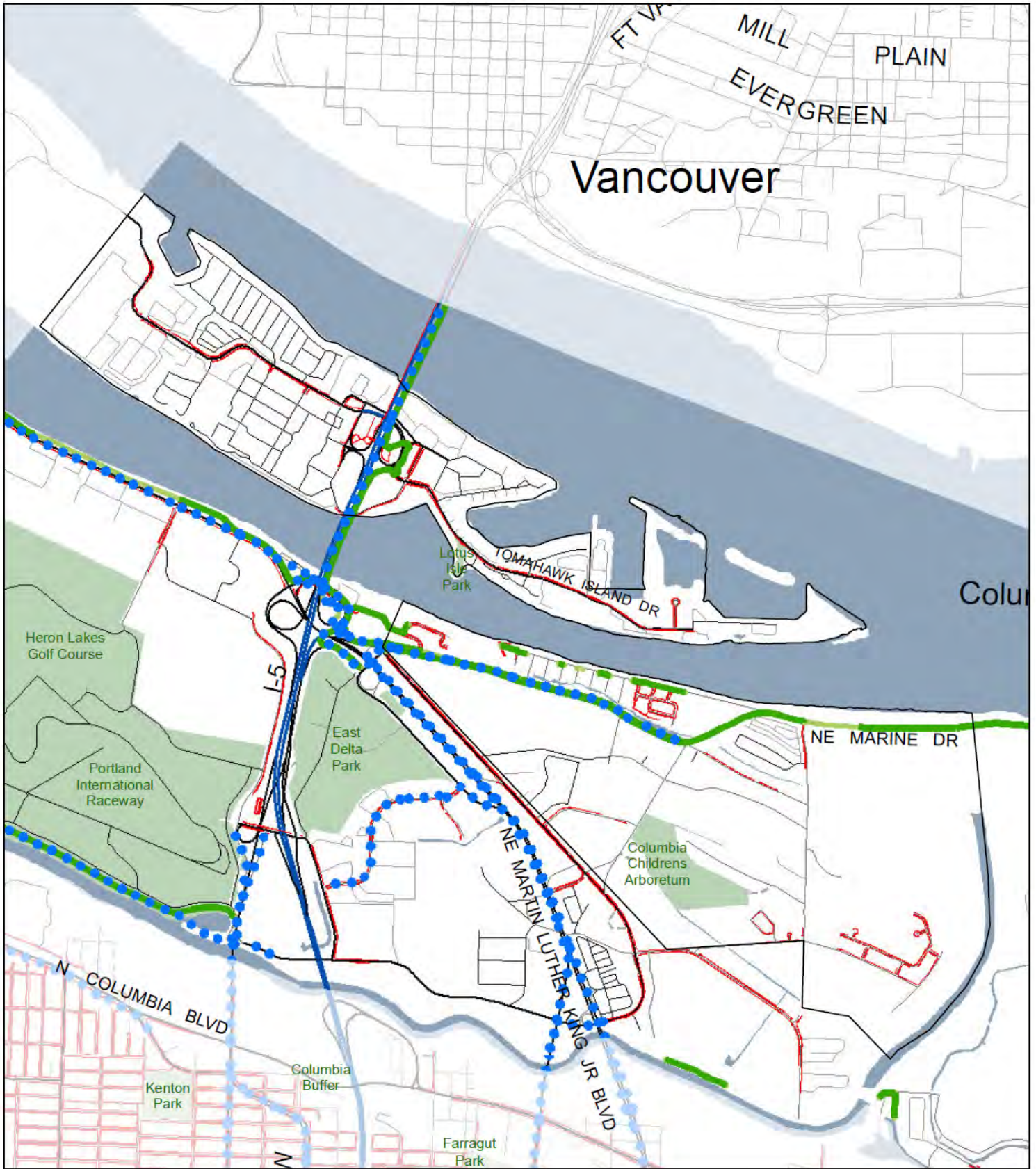
0 750 1,500 3,000 Feet



City of Portland Bureau of Planning & Sustainability
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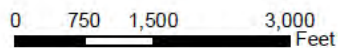
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Hayden Island-Bridgeton Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



City of Portland Bureau of Planning & Sustainability
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March 25, 2011

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Hayden Island-Bridgeton Analysis Area

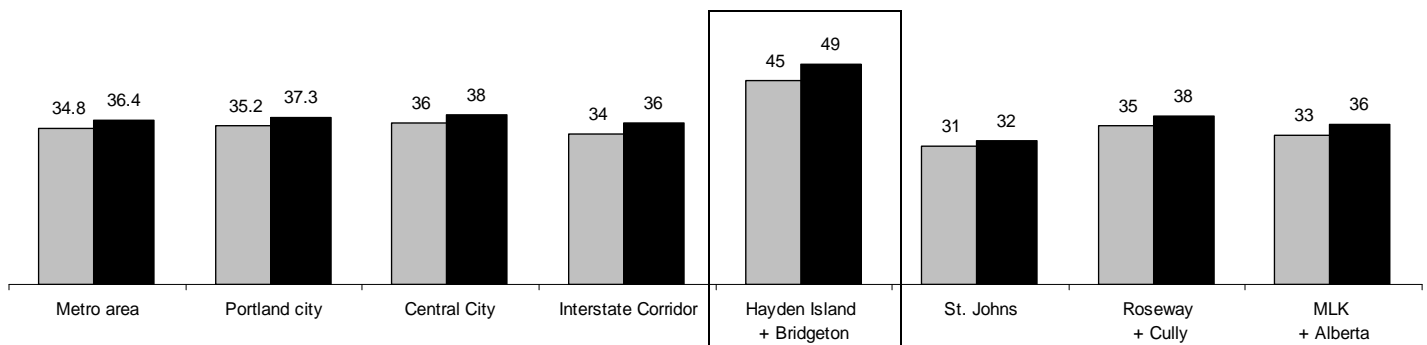
Demographics (2000 – 2010)

Population

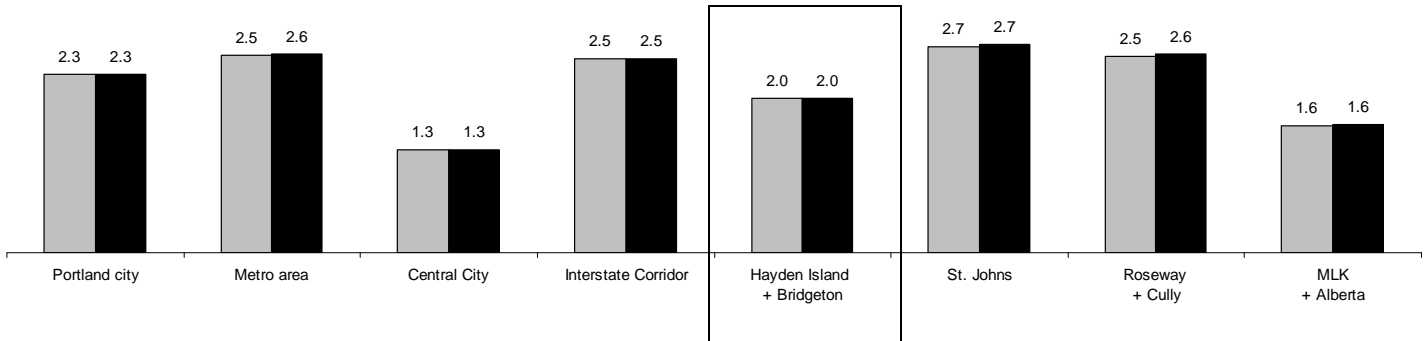
	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island Bridgeton	St. Johns	Roseway Cully	MLK Alberta
2010	2,226,000	589,000	30,931	33,855	4,223	33,262	34,333	37,215
2000	1,927,881	529,121	19,202	32,695	2,912	29,800	33,792	36,763
% change	12.9%	10.6%	61.1%	3.5%	45.0%	11.6%	1.6%	1.2%

■ 2000 ■ 2010

Median Age

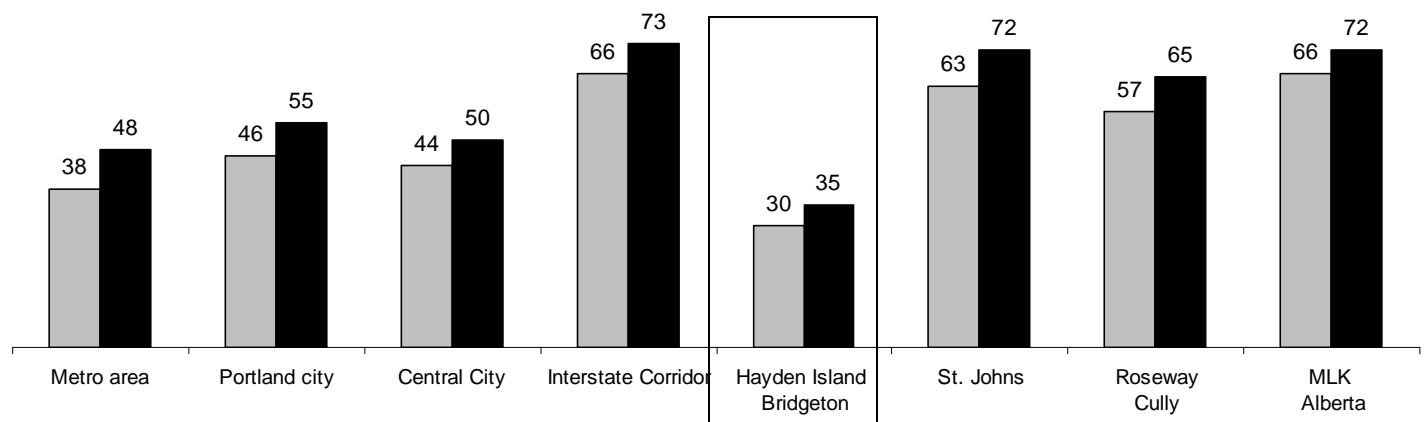


Average Household Size

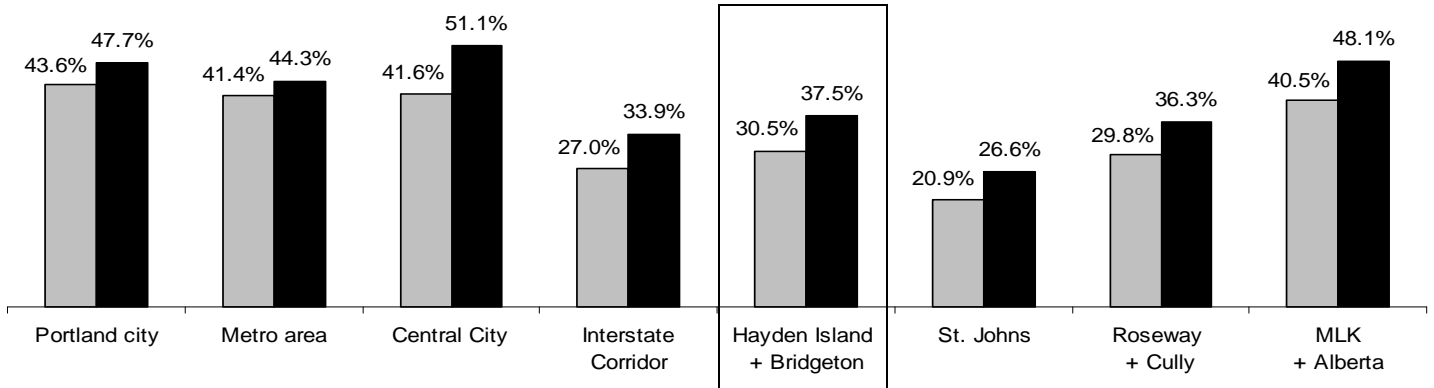


Diversity Index

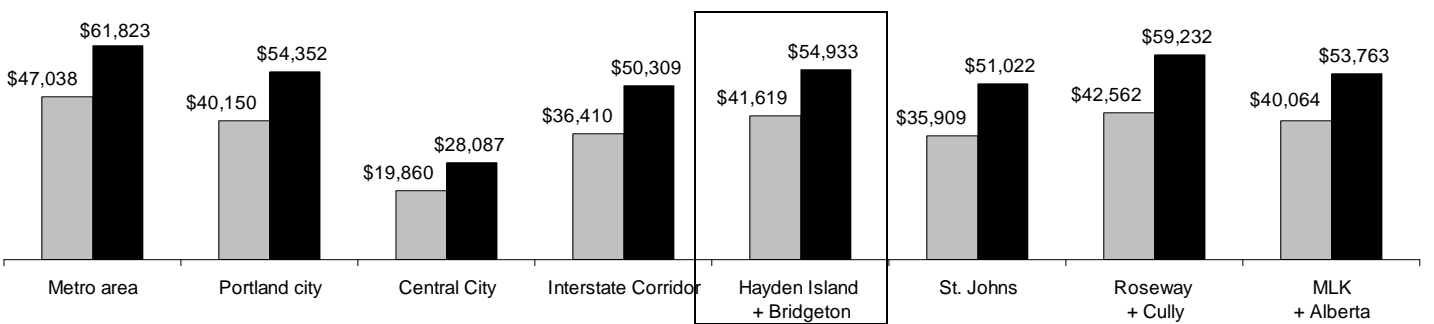
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



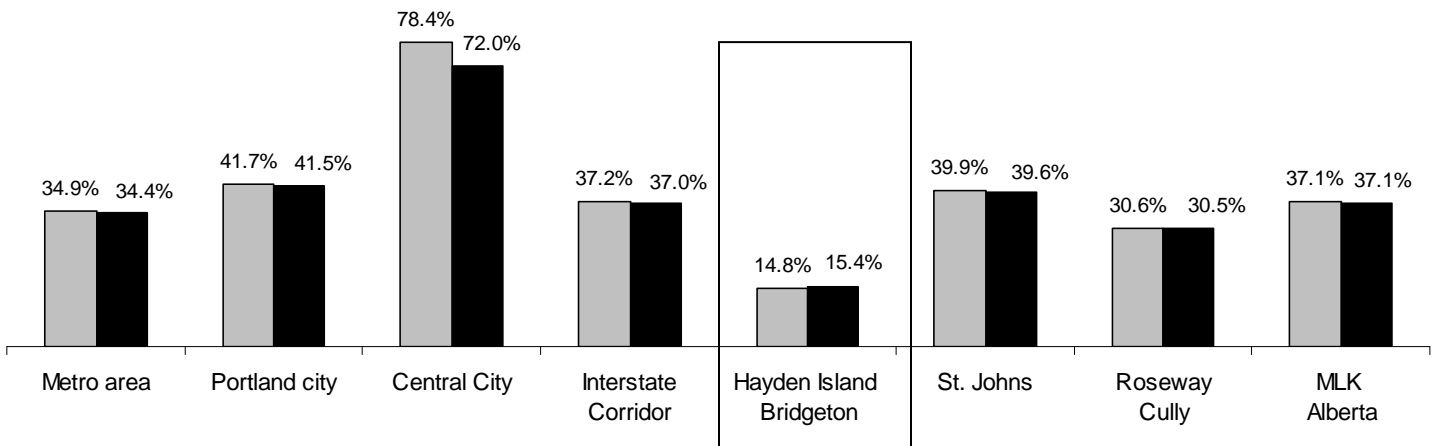
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island + Bridgeton	St. Johns	Roseway + Cully	MLK + Alberta
2010	273,500	253,184	400,314	197,371	79,875	\$192,095	223,725	\$236,154
2000	168,347	154,721	250,566	127,233	61,081	\$122,775	139,966	\$147,306
% change	62.5%	63.6%	59.8%	55.1%	30.8%	56.5%	59.8%	60.3%

Percent of Renters of Occupied Housing Units



Hayden Island-Bridgeton Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010

Source: COSTAR

RETAIL

Square Feet

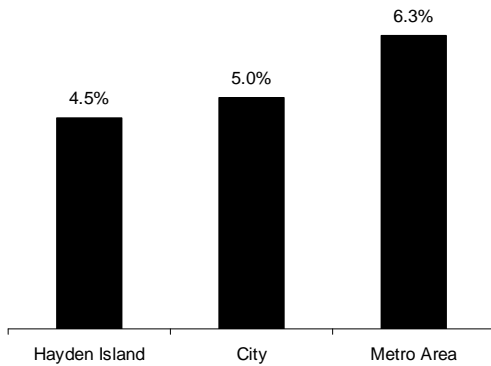
Hayden Island	City	Metro Area
1,124,437	51,937,895	107,875,146

OFFICE SPACE

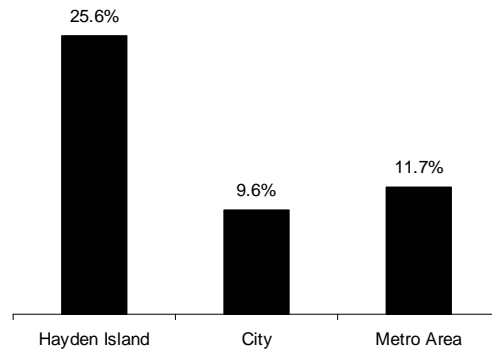
Square Feet

Hayden Island	City	Metro Area
79,556	54,348,765	92,465,455

Retail Vacancy



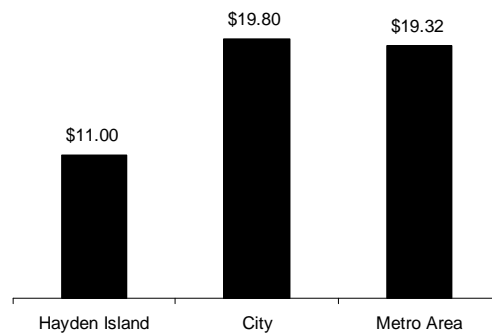
Office Vacancy



Retail Rents



Office Rents



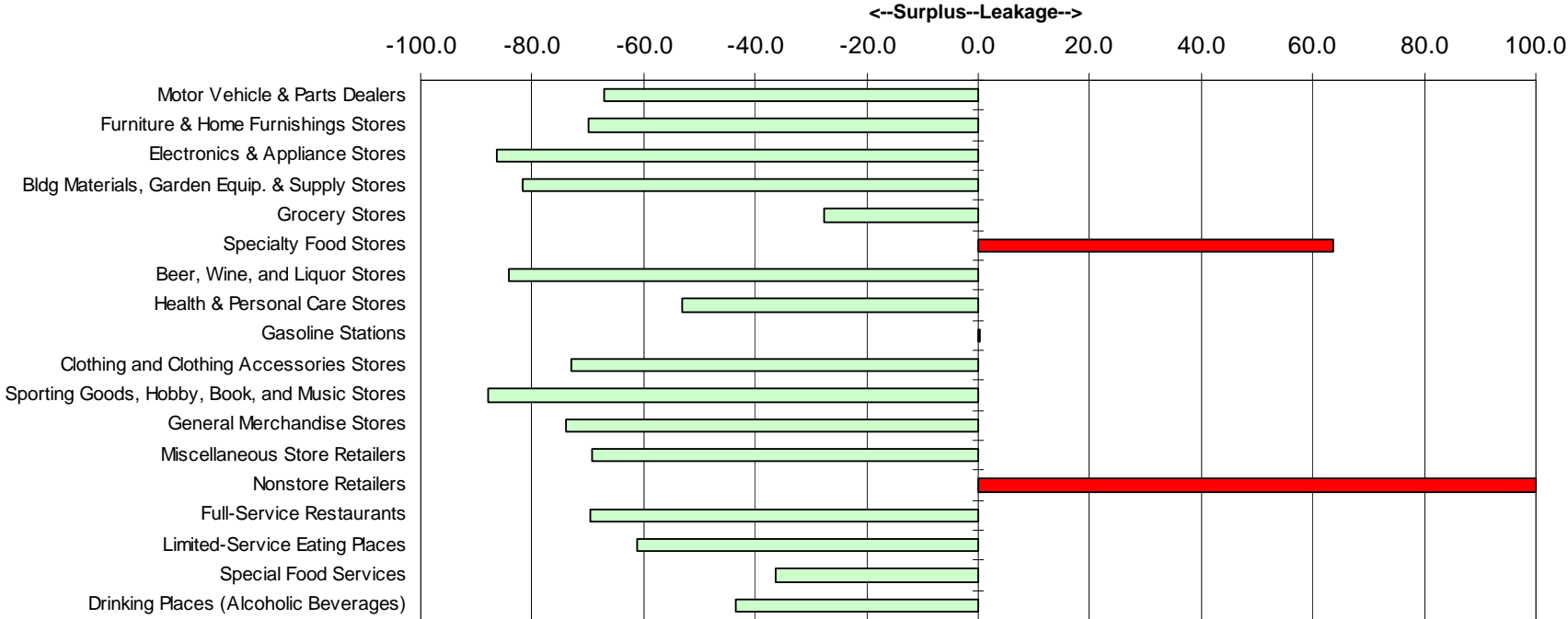
Hayden Island-Bridgeton Analysis Area

Retail Market Profile

Retail Gap = \$139 million (surplus)

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$39,020,400	\$178,393,072	-\$139,372,672	-64.1	106
Total Retail Trade (NAICS 44-45)	\$33,529,289	\$155,443,577	-\$121,914,288	-64.5	78
Total Food & Drink (NAICS 722)	\$5,491,111	\$22,949,495	-\$17,458,384	-61.4	28

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Hayden Island-Bridgeton Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

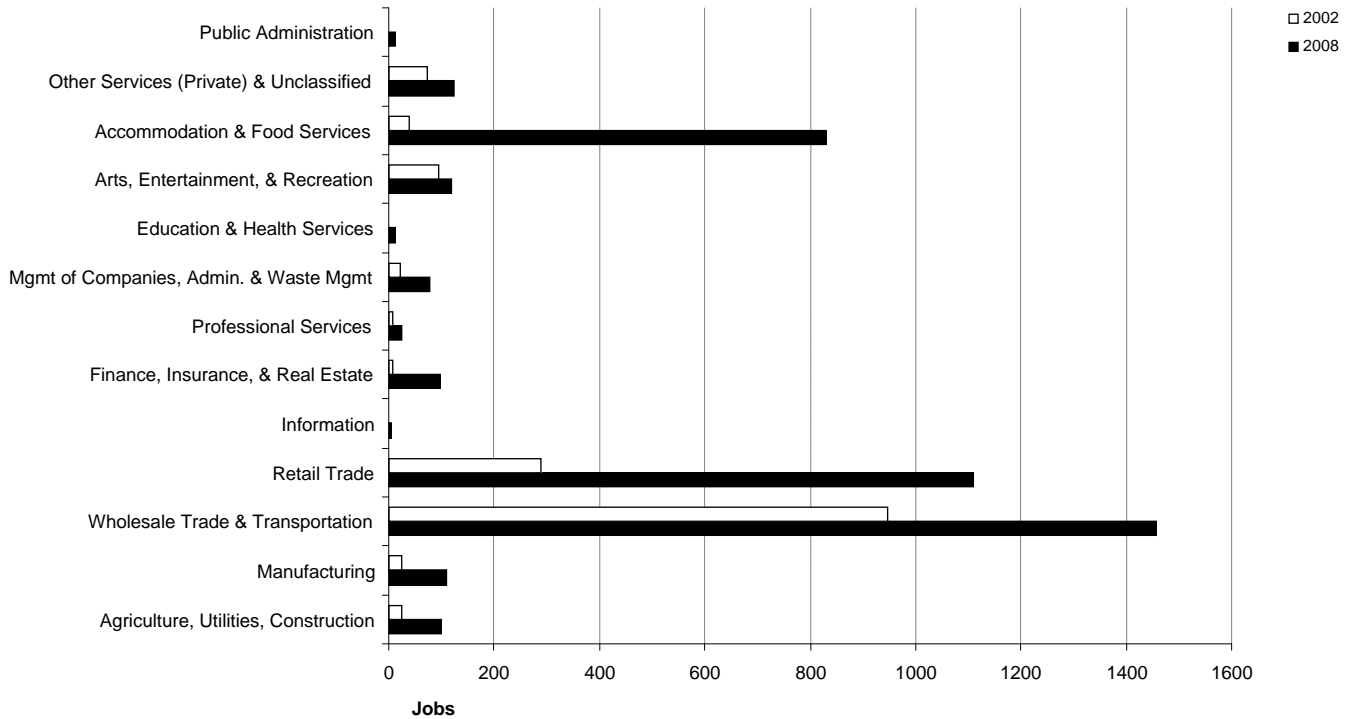
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

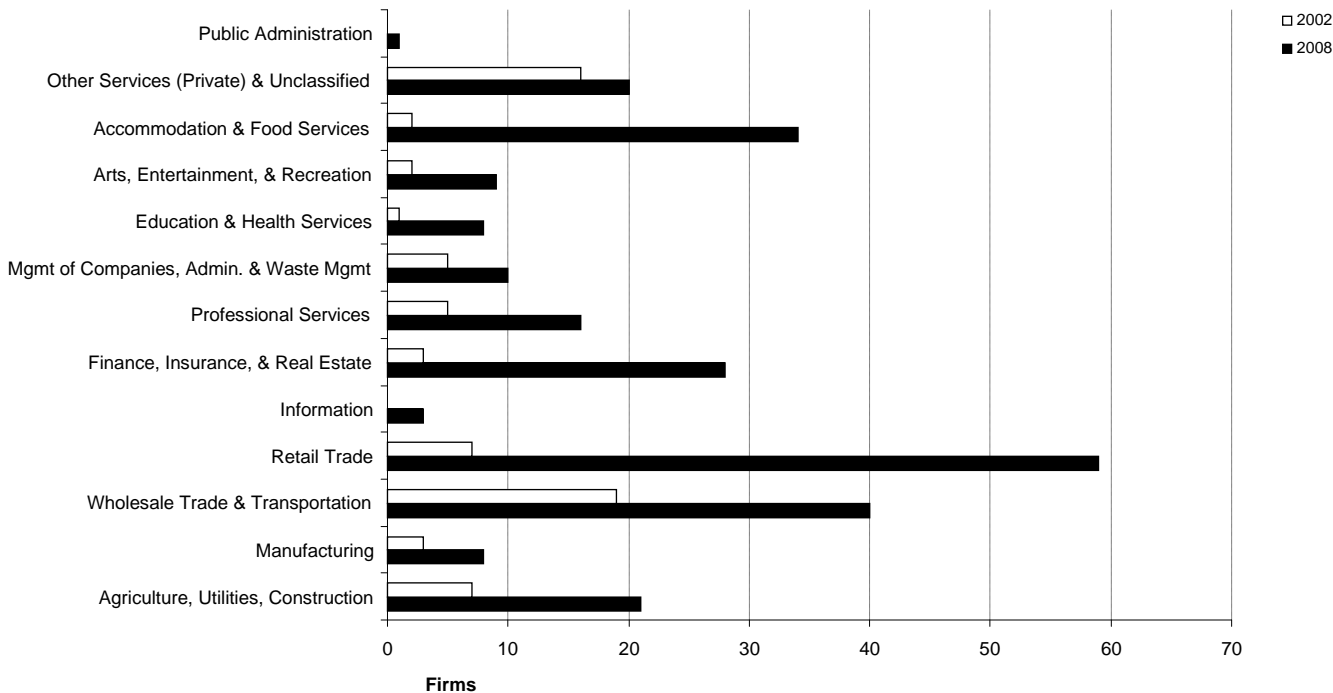
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	1,527	4,079	+2,552
Total Firms	70	257	+187
Average Annual Wages	\$38,677	\$33,285	+\$5,392

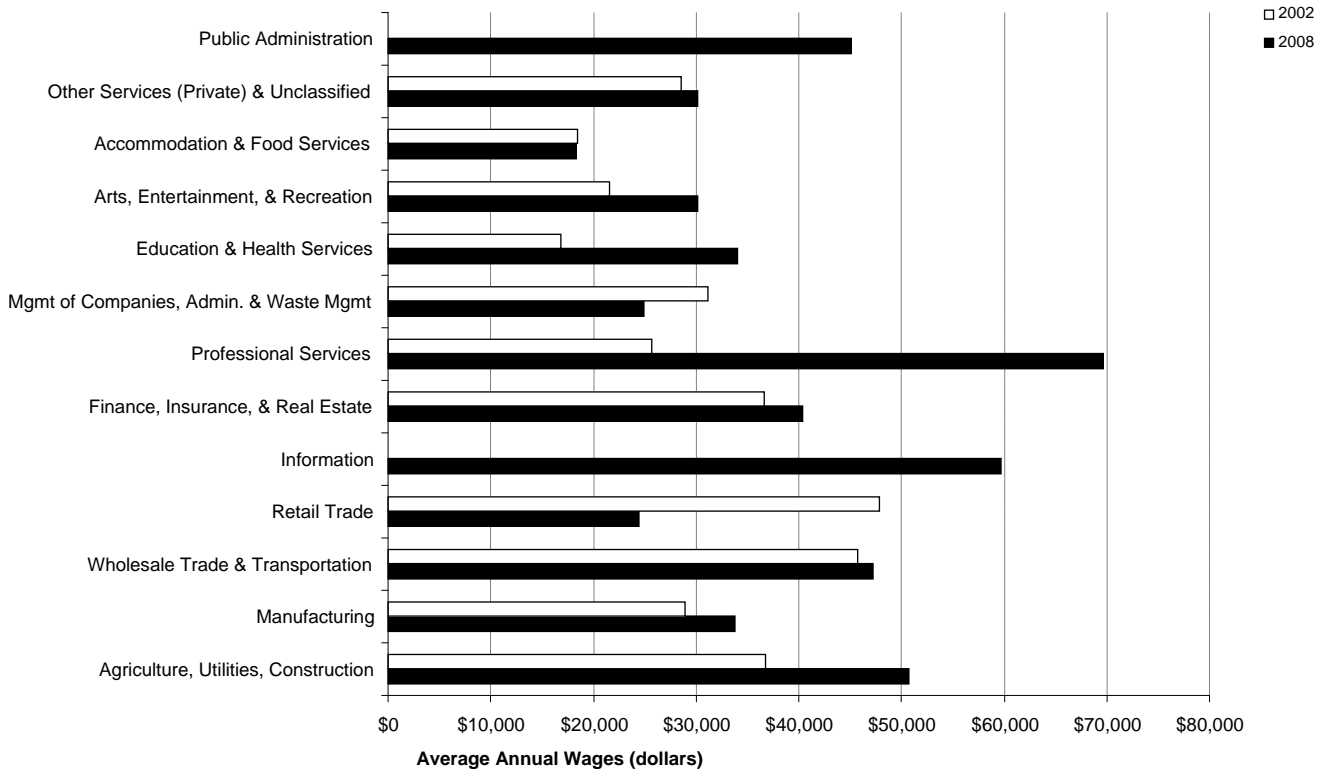
Total Jobs



Total Firms



Average Annual Wages

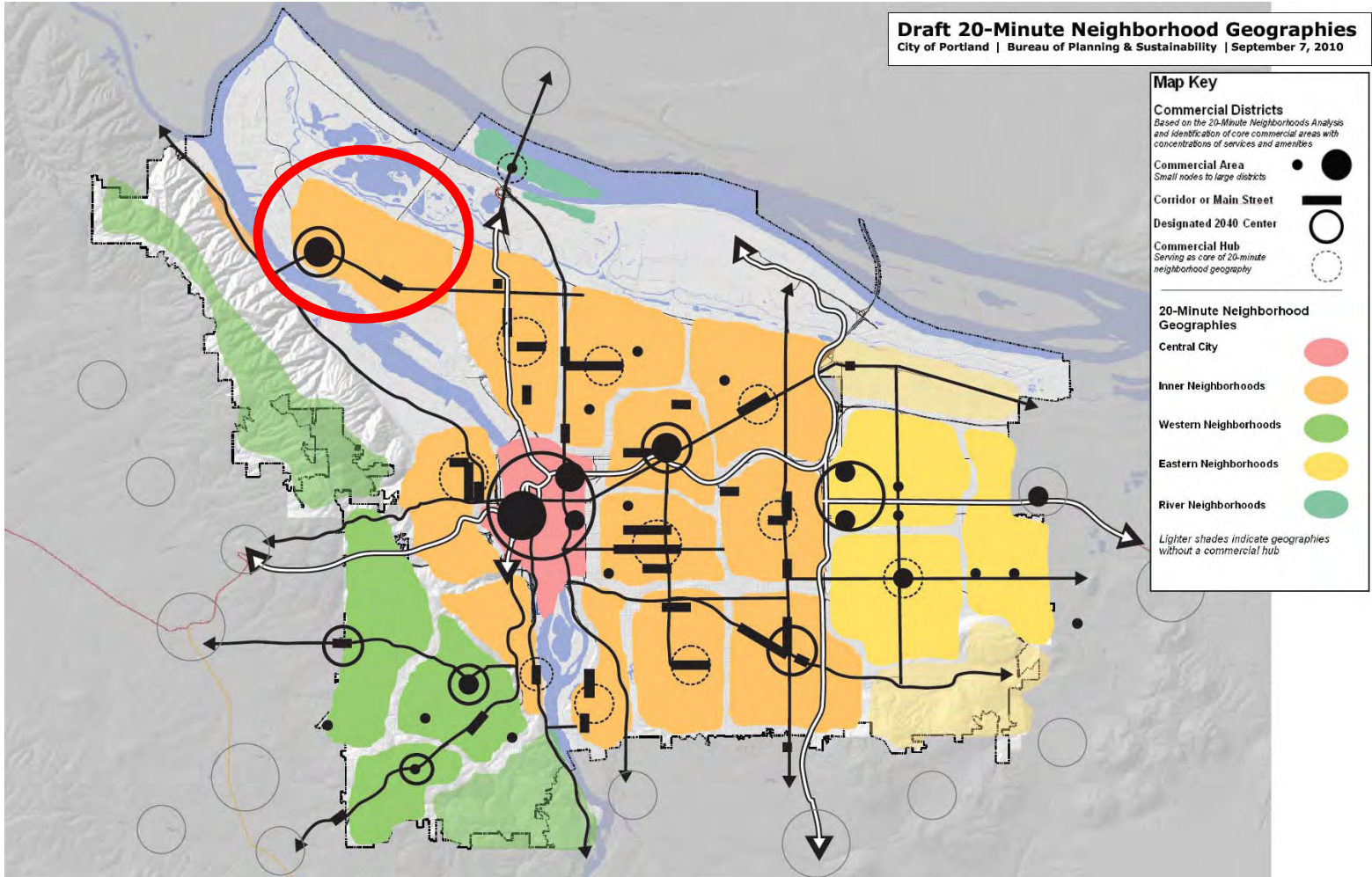


4

St. Johns Analysis Area

Including Cathedral Park, Portsmouth, St. Johns, University Park, and parts of the Arbor Lodge and Kenton neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

St. Johns Analysis Area

Services and Amenities

Population: 33,300 people (12,300 households)
Land Area: 6.7 square miles (5,000 people per sq. mile)

Commercial Districts

The area's largest concentration of commercial services is along North Lombard in the St. Johns town center. There are smaller clusters of commercial services elsewhere along North Lombard, particularly east of North Portsmouth Avenue.

Grocery stores: 4

Community Amenities

Community Centers: 2 (University Park [full service] and St. Johns community centers)

Libraries: 1 (St. Johns Library)

Parks and Open Spaces: 229 acres - including Cathedral, Columbia, McCoy, McKenna, Northgate, Portsmouth, St. Johns, University, Chimney, and Pier parks.

Tree Canopy Coverage: 22%

Public Schools: 1 high school (Roosevelt)

6 K-8 schools (James John, Rosa Parks and Sitton elementary schools, Astor and Cesar Chavez K-8 schools, George Middle School)

Colleges (campus): 1 (University of Portland)

Hospitals: None

Farmers Markets: 1 (St. Johns Farmers Market)

Transit Centers/Stations: None

Walkable Access Score: 43 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

Within 1/2 mile of a park:	91%
Within 1/2 mile of a public elementary school:	45%
Within 3 miles of a full-service community center:	99%
Within 1/2 mile of a full-service grocery store:	15%
Within 1/4 mile of a frequent service transit stop:	65%

Neighborhood and Business Associations

Neighborhood Associations: Cathedral Park, Portsmouth, St. Johns, University Park, and parts of Arbor Lodge and Kenton

Business Associations: North Portland and St. Johns business associations, Columbia Corridor Association

St. Johns Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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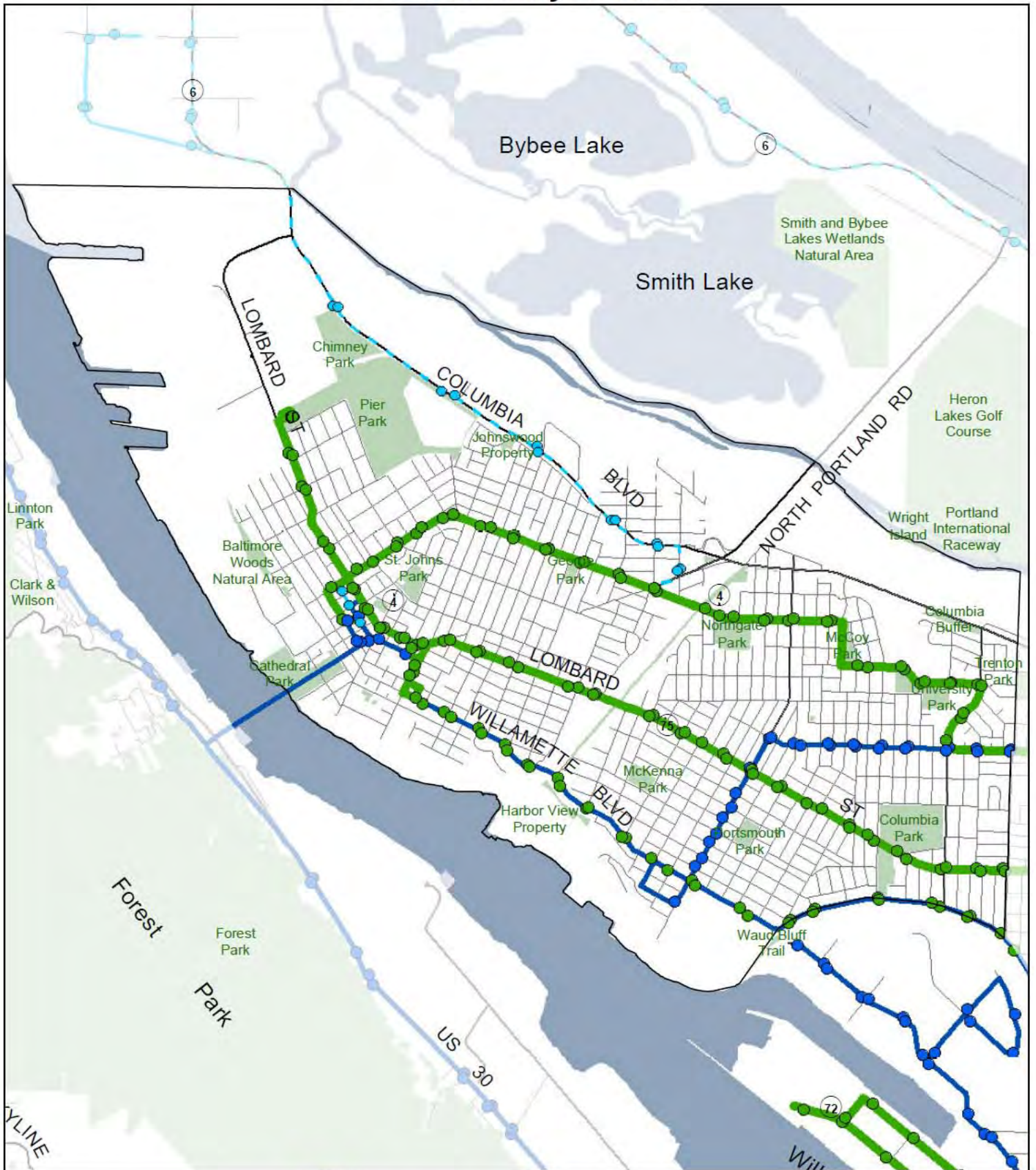
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March 25, 2011

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commercial data from InfoUSA 2008

St. Johns Analysis Area



Transit Infrastructure

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-  MAX
-  Streetcar
-  Frequent Service
-  Standard Service
-  Rush-Hour Only Service



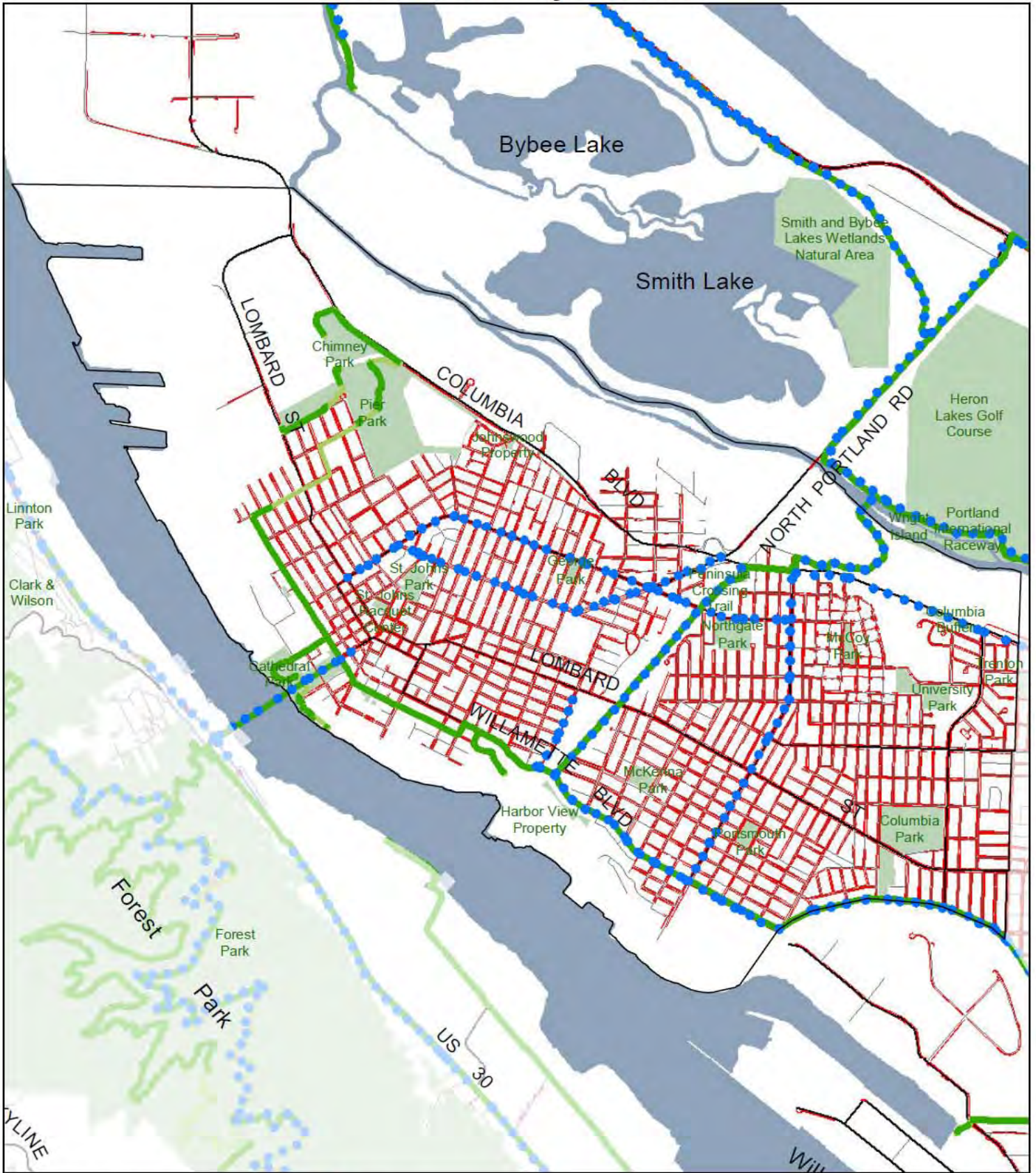
0 750 1,500 3,000 Feet



City of Portland Bureau of Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director

May 12, 2011

St. Johns Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



0 750 1,500 3,000 Feet



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Sam Adams, Mayor | Susan Anderson, Director

March 25, 2011

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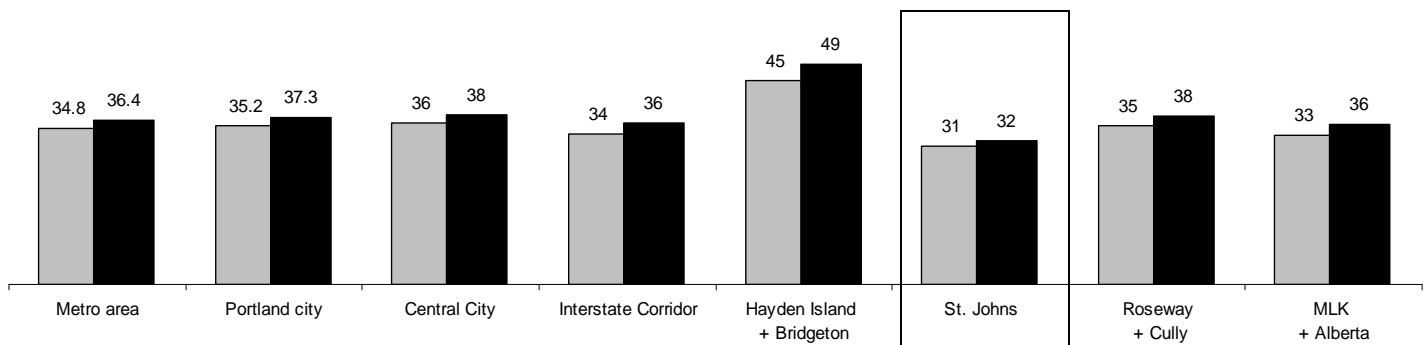
St. Johns Analysis Area Demographics (2000 – 2010)

Population

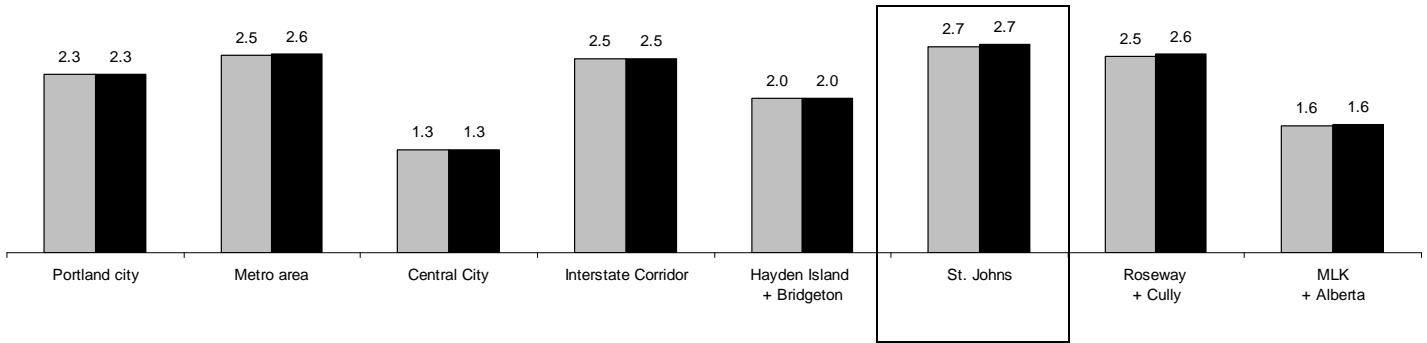
	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island Bridgeton	St. Johns	Roseway Cully	MLK Alberta
2010	2,226,000	589,000	30,931	33,855	4,223	33,262	34,333	37,215
2000	1,927,881	529,121	19,202	32,695	2,912	29,800	33,792	36,763
% change	12.9%	10.6%	61.1%	3.5%	45.0%	11.6%	1.6%	1.2%

■ 2000 ■ 2010

Median Age

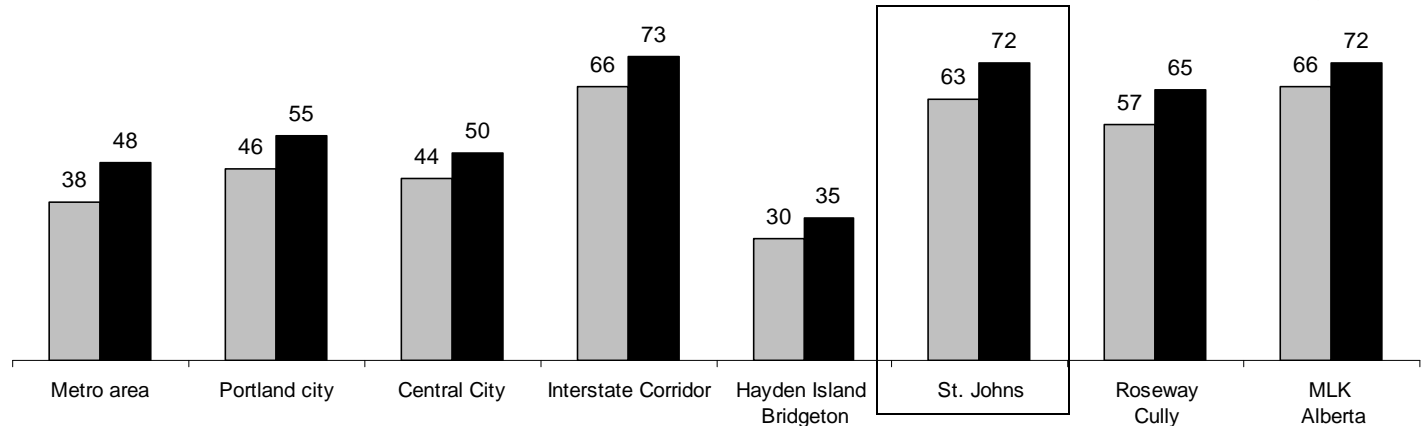


Average Household Size

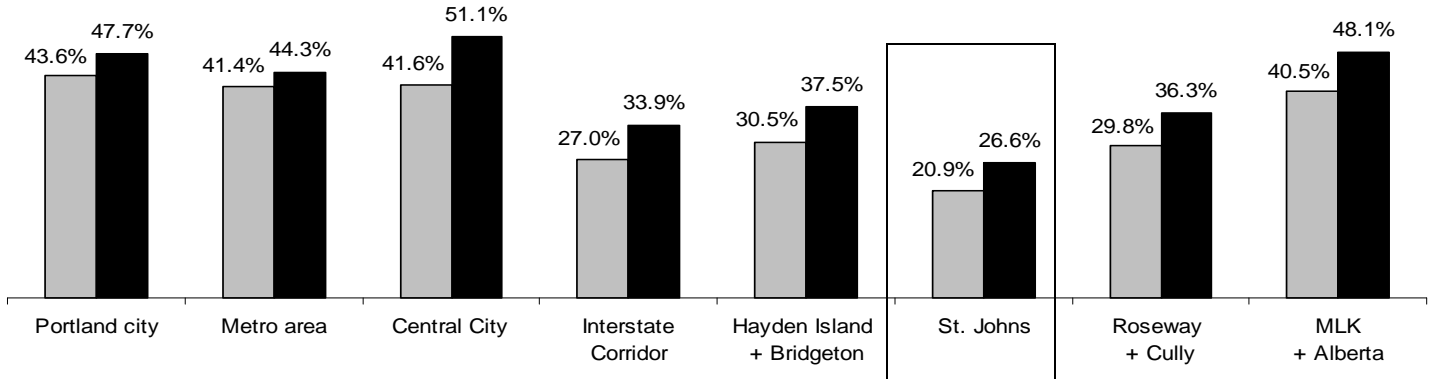


Diversity Index

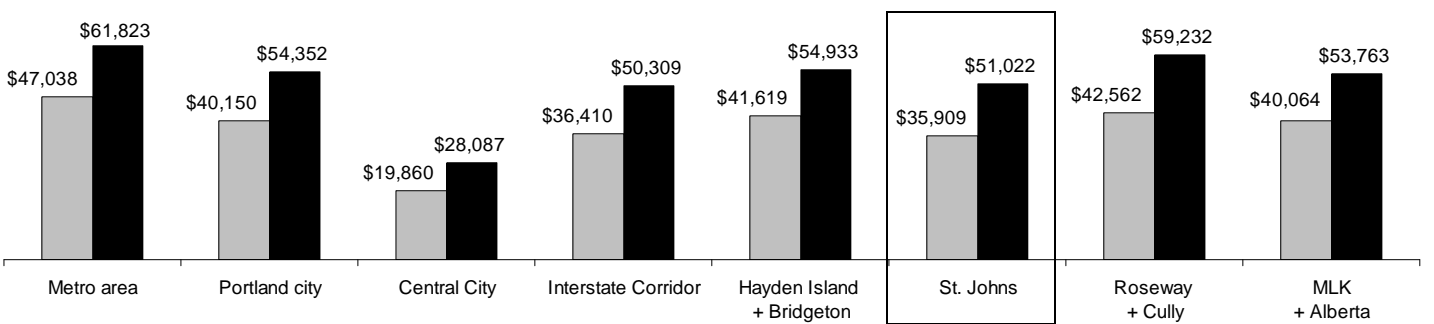
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



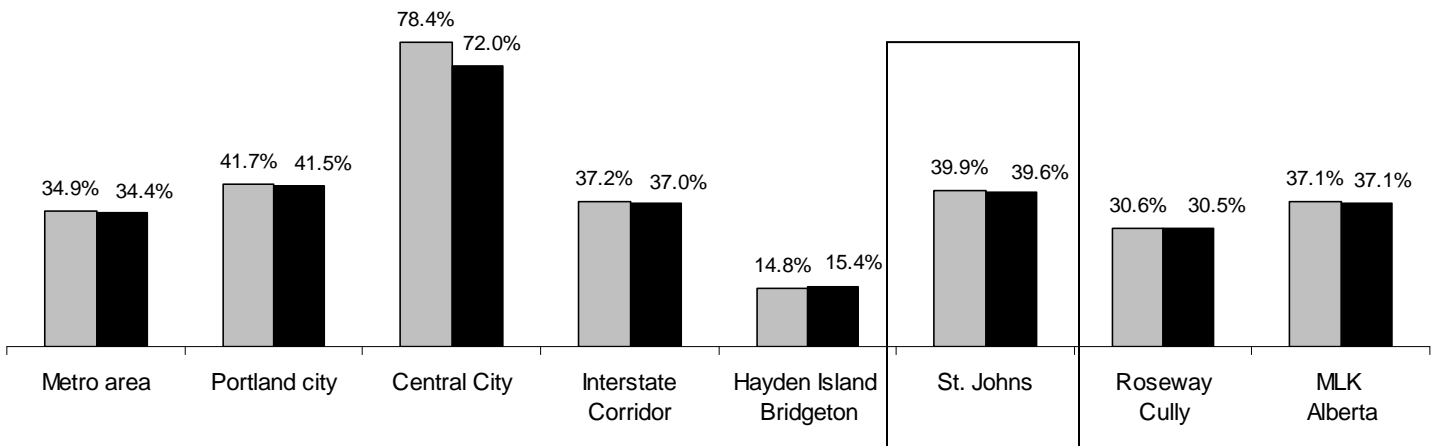
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island + Bridgeton	St. Johns	Roseway + Cully	MLK + Alberta
2010	273,500	253,184	400,314	197,371	79,875	\$192,095	223,725	\$236,154
2000	168,347	154,721	250,566	127,233	61,081	\$122,775	139,966	\$147,306
% change	62.5%	63.6%	59.8%	55.1%	30.8%	56.5%	59.8%	60.3%

Percent of Renters of Occupied Housing Units



St. Johns Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

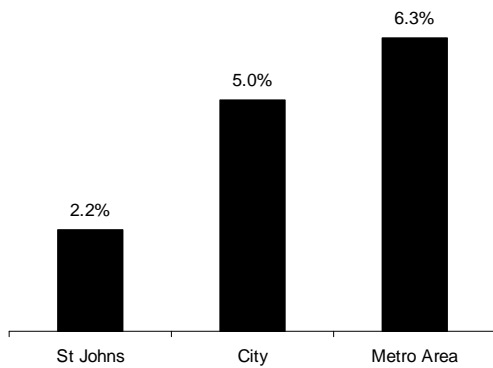
St Johns	City	Metro Area
1,078,053	51,937,895	107,875,146

OFFICE SPACE

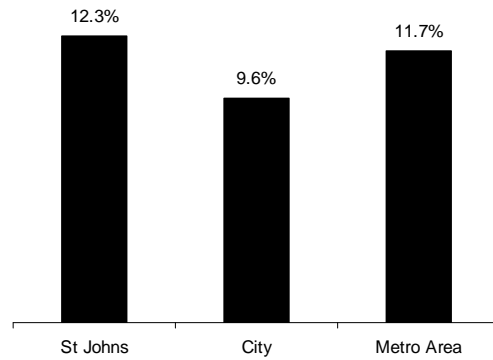
Square Feet

St Johns	City	Metro Area
268,921	54,348,765	92,465,455

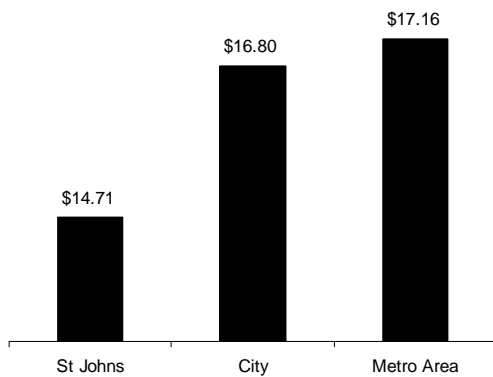
Retail Vacancy



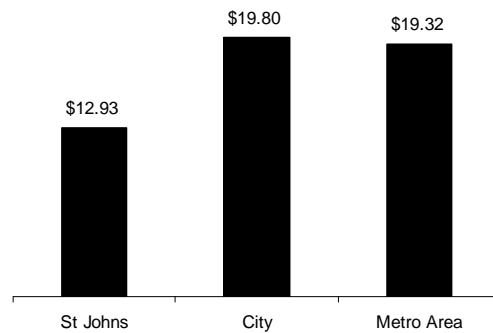
Office Vacancy



Retail Rents



Office Rents



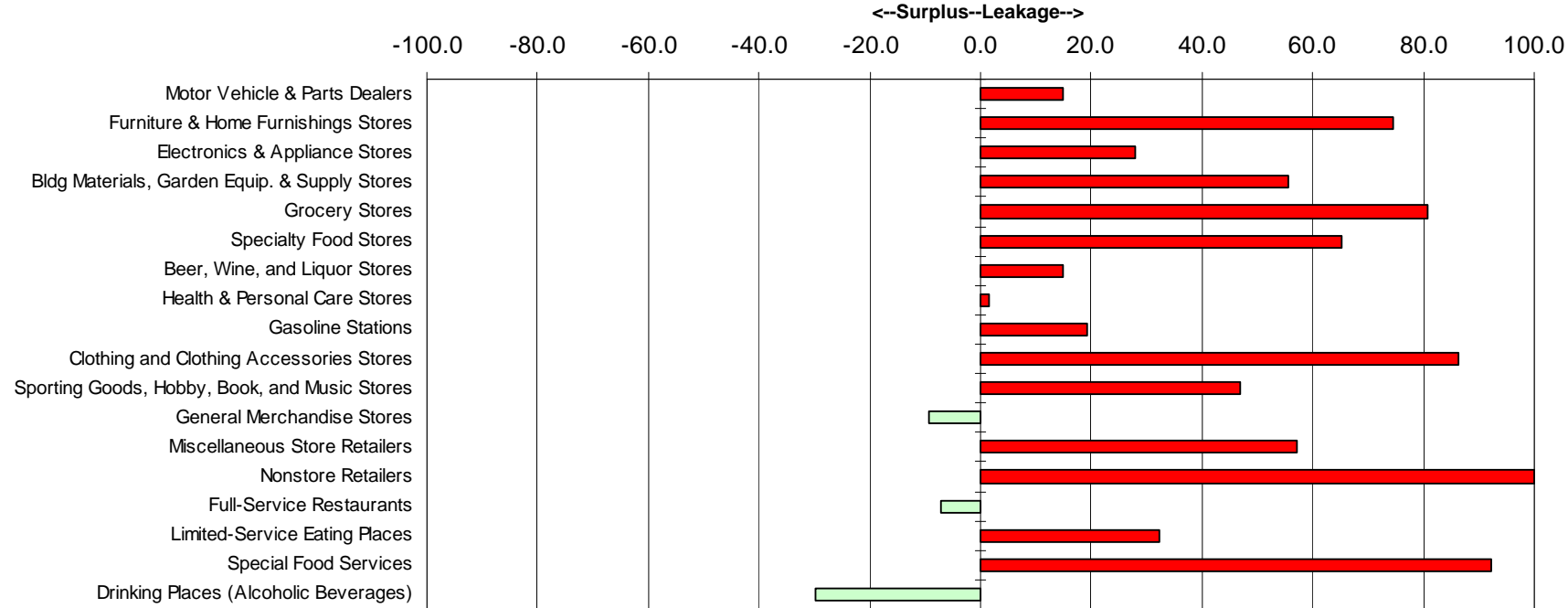
St. Johns Analysis Area

Retail Market Profile

Retail Gap = \$95 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$233,891,636	\$138,672,905	\$95,218,731	25.6	150
Total Retail Trade (NAICS 44-45)	\$199,628,463	\$111,606,443	\$88,022,020	28.3	92
Total Food & Drink (NAICS 722)	\$34,263,173	\$27,066,462	\$7,196,711	11.7	58

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



St. Johns Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

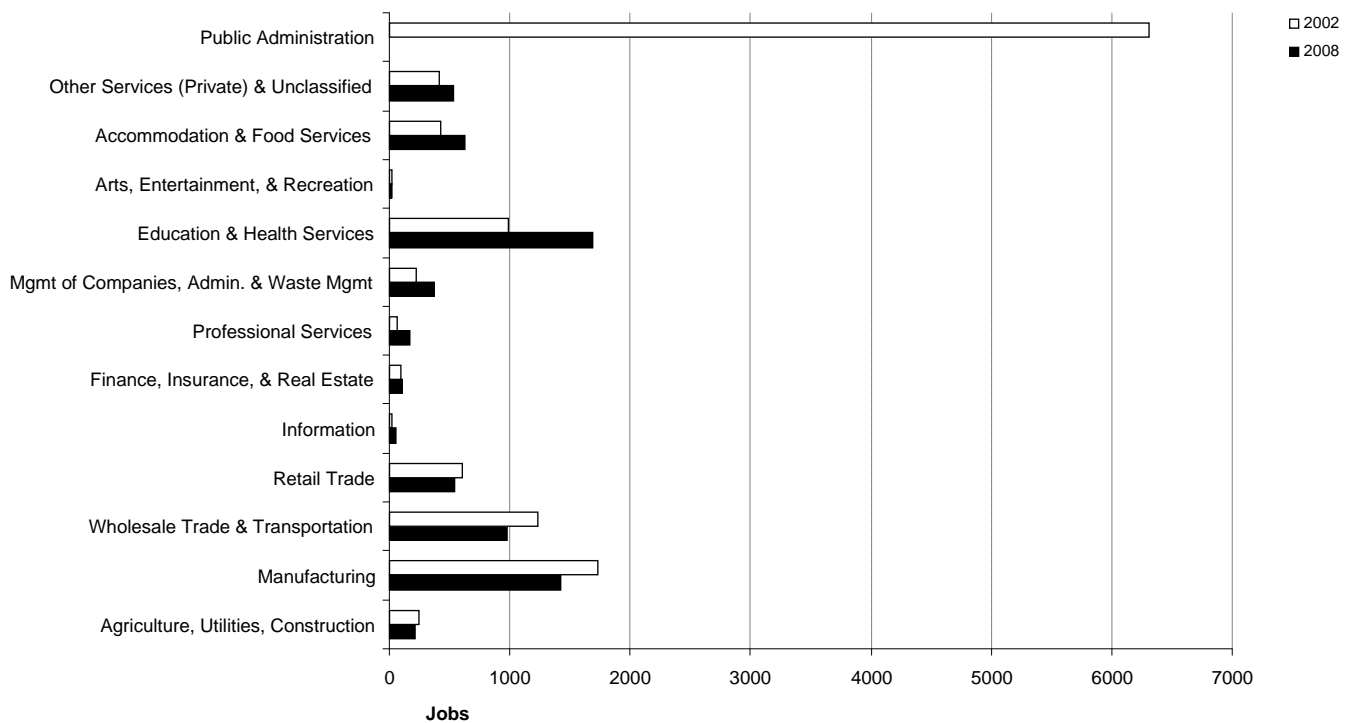
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

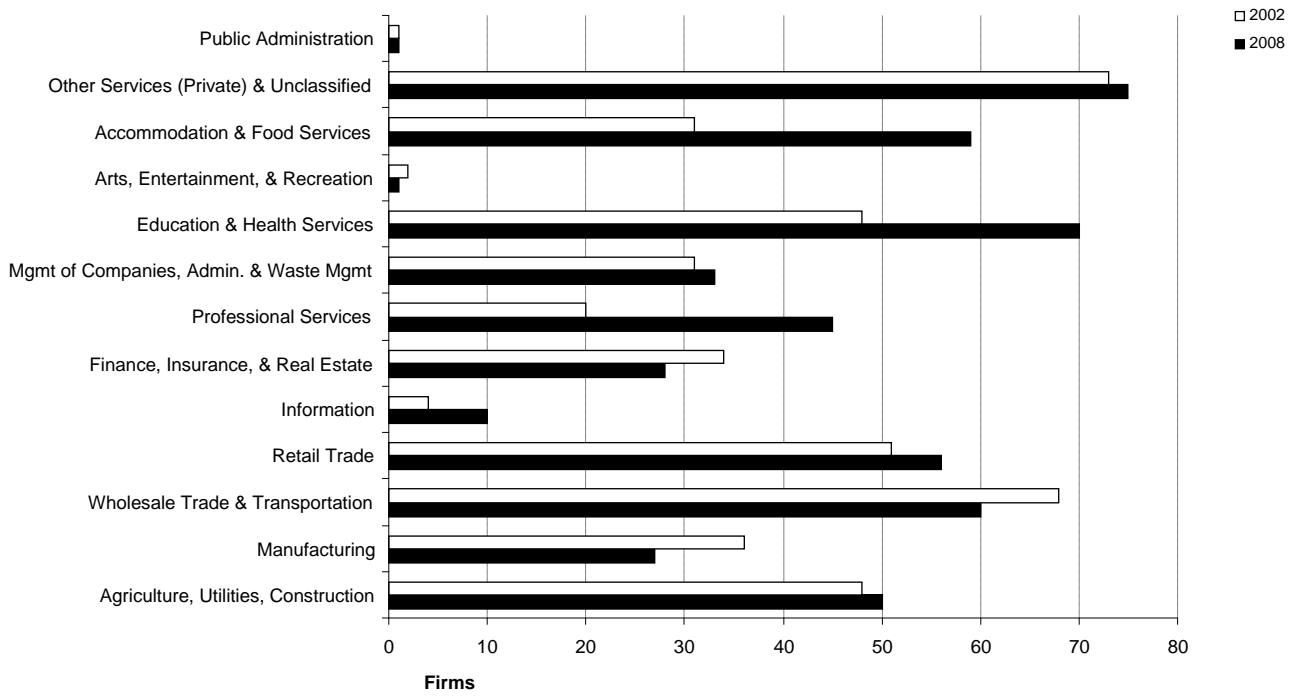
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	12,384	6,727	-\$5,647
Total Firms	447	515	+68
Average Annual Wages	\$41,097	\$39,184	-\$1,913

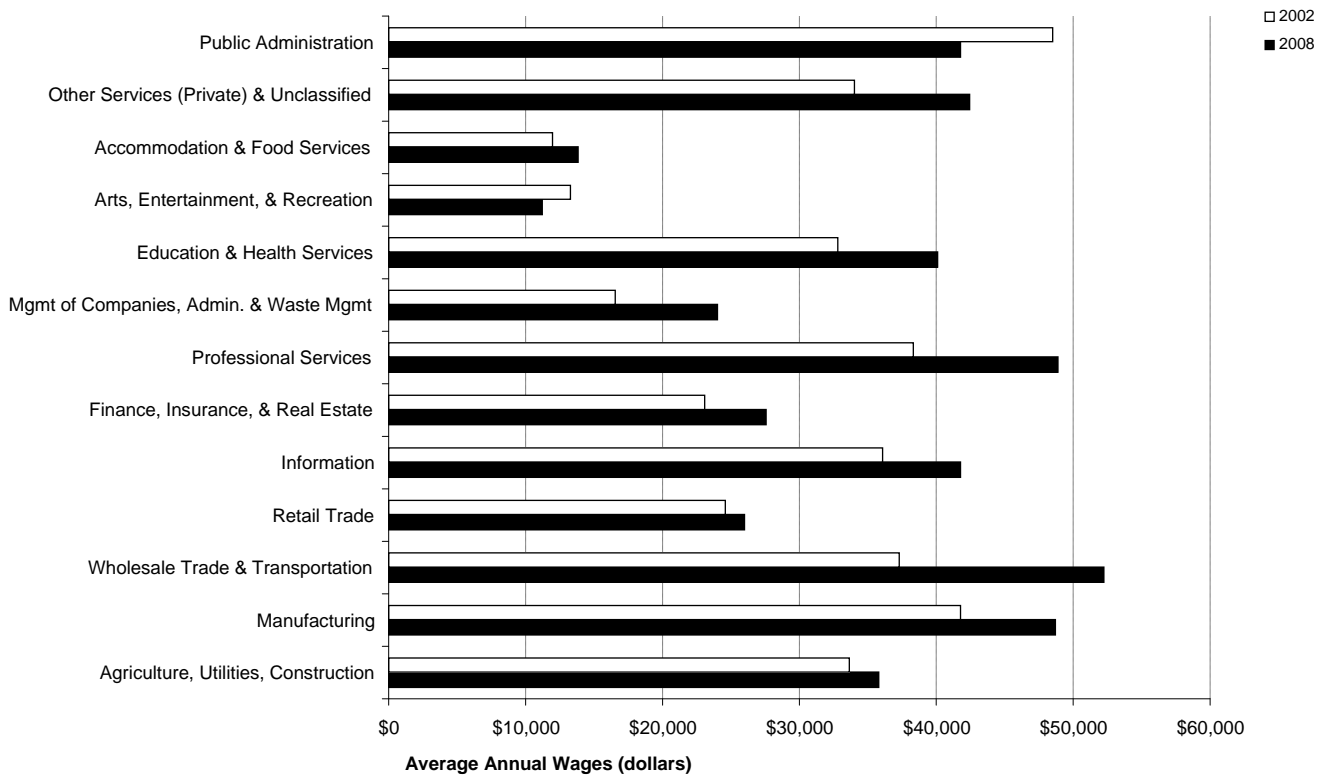
Total Jobs



Total Firms



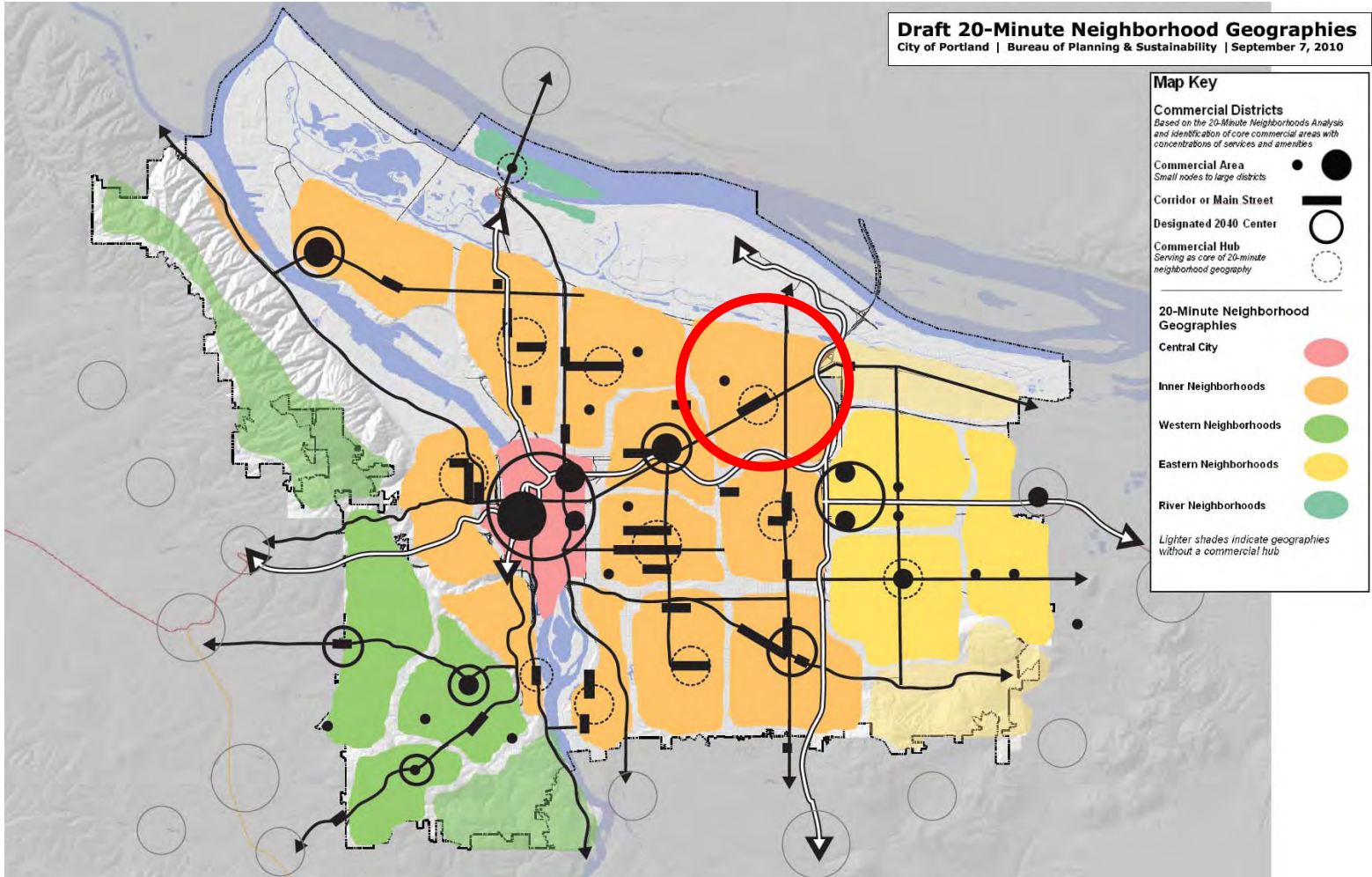
Average Annual Wages



Roseway-Cully Analysis Area

Including Cully, Madison South, Rose City Park, Roseway, and Sumner neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Roseway-Cully Analysis Area

Services and Amenities

Population: 34,300 people (13,900 households)
Land Area: 7.1 square miles (4,800 people per sq. mile)

Commercial Districts

The largest concentration of commercial services is in the Portland International District along Sandy Boulevard, centered around 72nd Avenue. Secondary commercial areas are located at NE Prescott and Cully, along NE 82nd Avenue, and at the area's western edge along NE 42nd Avenue.

Grocery stores: 2

Community Amenities

Community Centers: None

Libraries: 1 (Gregory Heights Library)

Parks and Open Spaces: 259 acres - including Rose City Golf Course, Rocky Butte, Normandale Park, Glenhaven Park, Whitaker Ponds, and the Roseway Parkway

Tree Canopy Coverage: 19%

Public Schools: 1 high school (Madison),
4 K-8 schools (Lee, Rigler, Roseway Heights, Scott)

Colleges (campus): None

Hospitals: None

Farmers Markets: 1 (Cully Collective Market)

Transit Centers/Stations: 3 (Parkrose/Sumner Transit Center, 60th Avenue, and 82nd Avenue light rail stations – all located at edges of area)

Walkable Access Score: 46 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

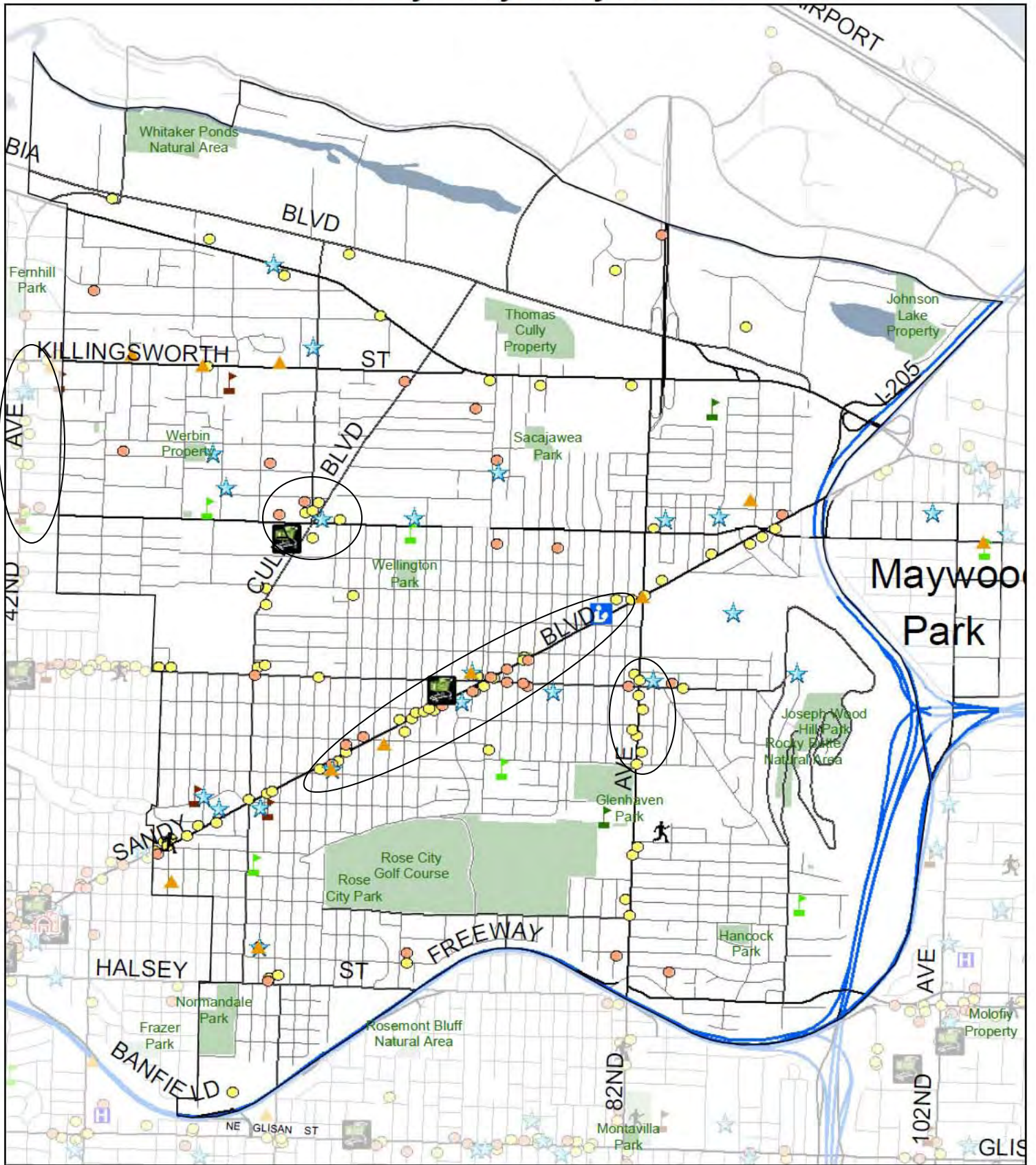
Within 1/2 mile of a park:	73%
Within 1/2 mile of a public elementary school:	34%
Within 3 miles of a full-service community center:	17%
Within 1/2 mile of a full-service grocery store:	17%
Within 1/4 mile of a frequent service transit stop:	45%

Neighborhood and Business Associations

Neighborhood Associations: Cully, Madison South, Rose City Park, Roseway, Sumner

Business Associations: Portland International District, Parkrose Business Association, 42nd Avenue Business Association

Roseway-Cully Analysis Area

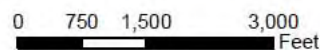


Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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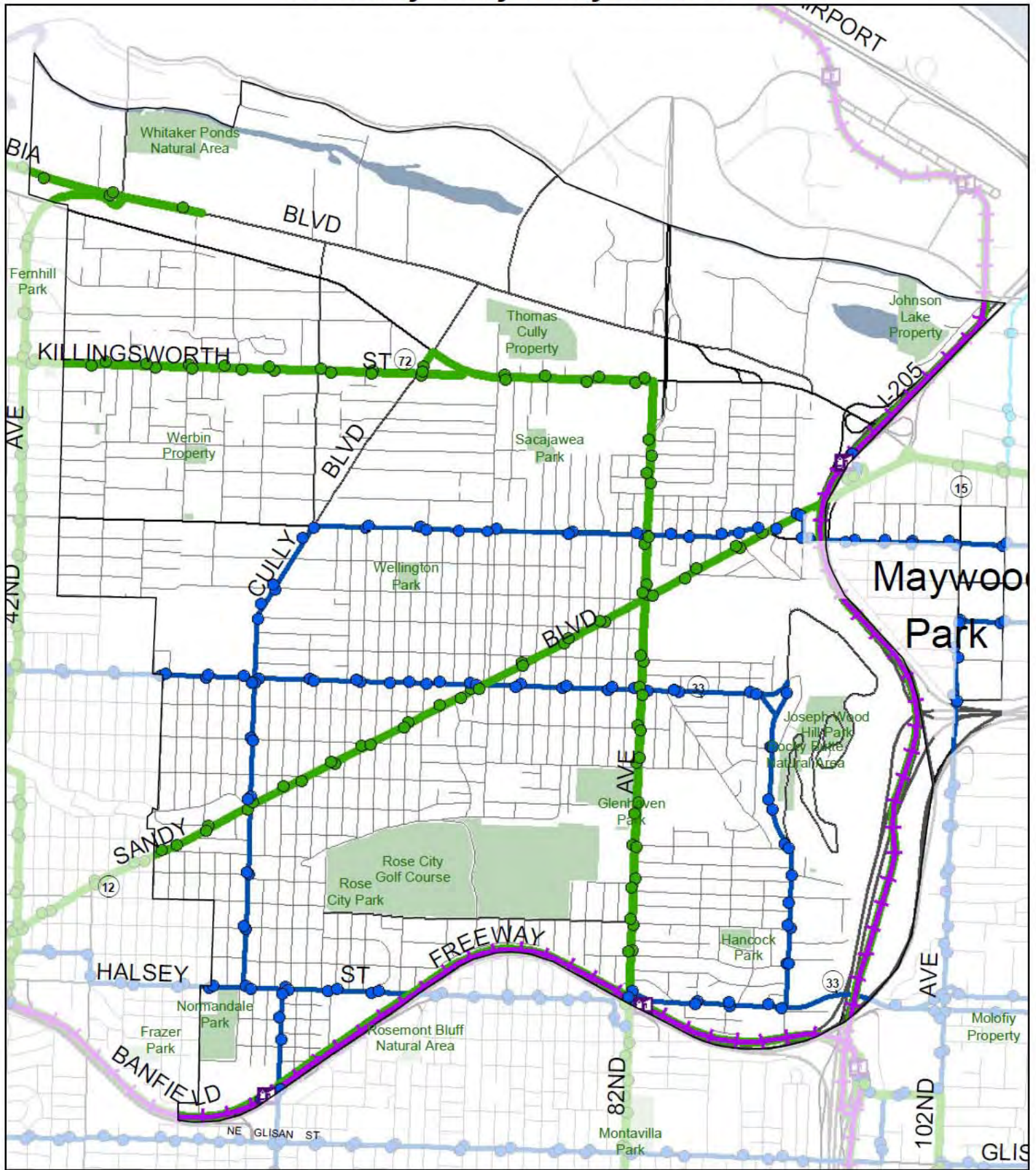


March 25, 2011

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commercial data from InfoUSA 2008

Roseway-Cully Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



0 750 1,500 3,000 Feet

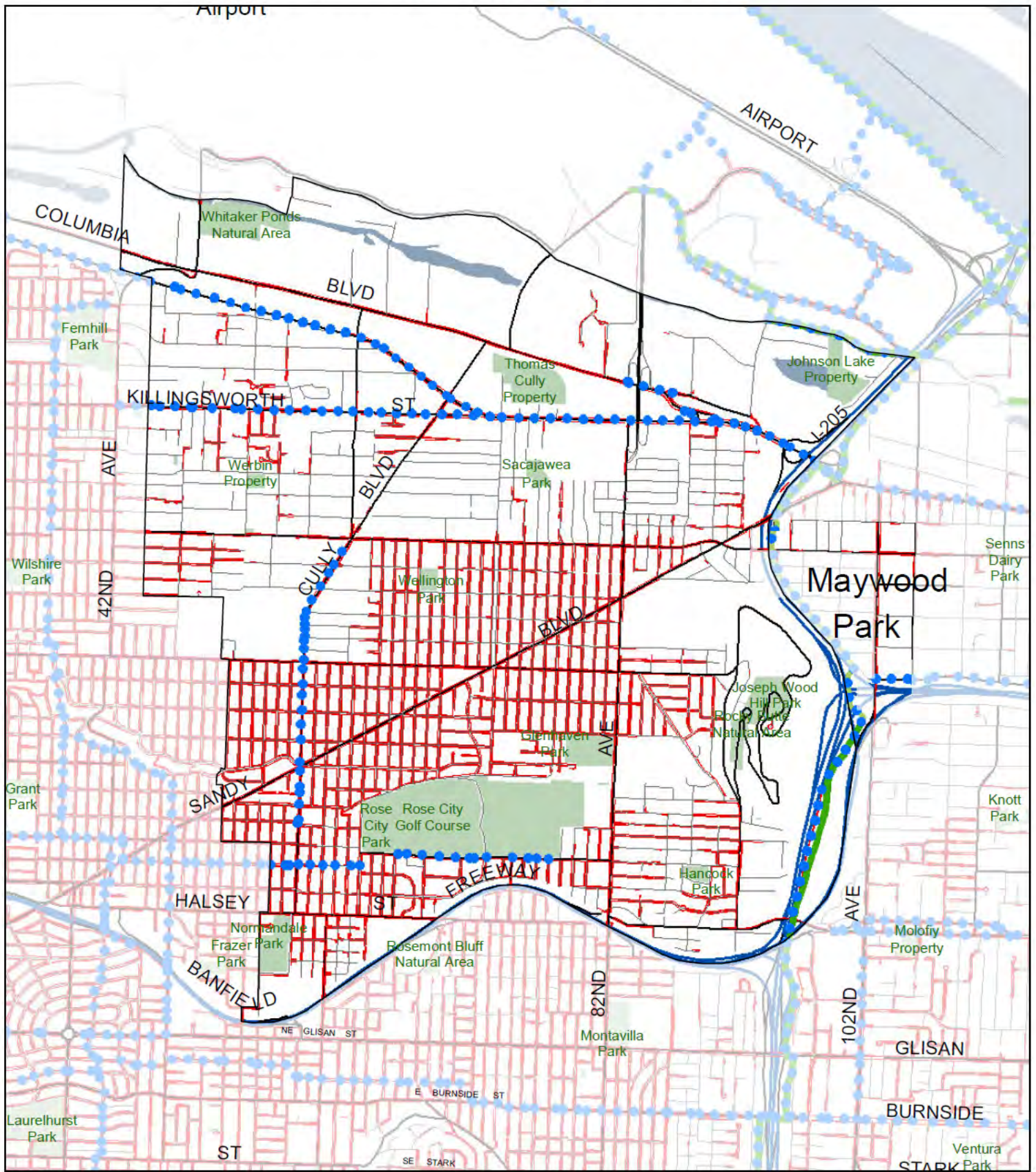


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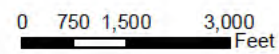
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Roseway-Cully Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

Roseway-Cully Analysis Area

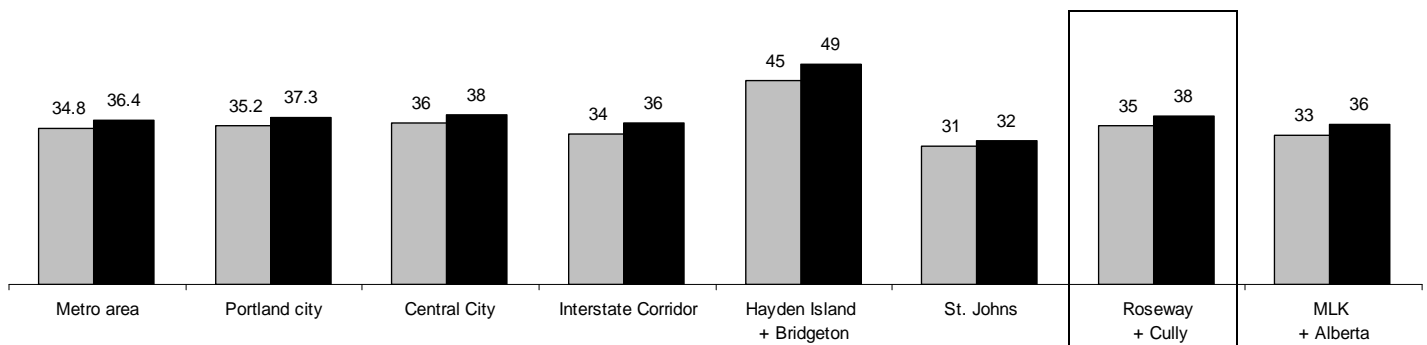
Demographics (2000 – 2010)

Population

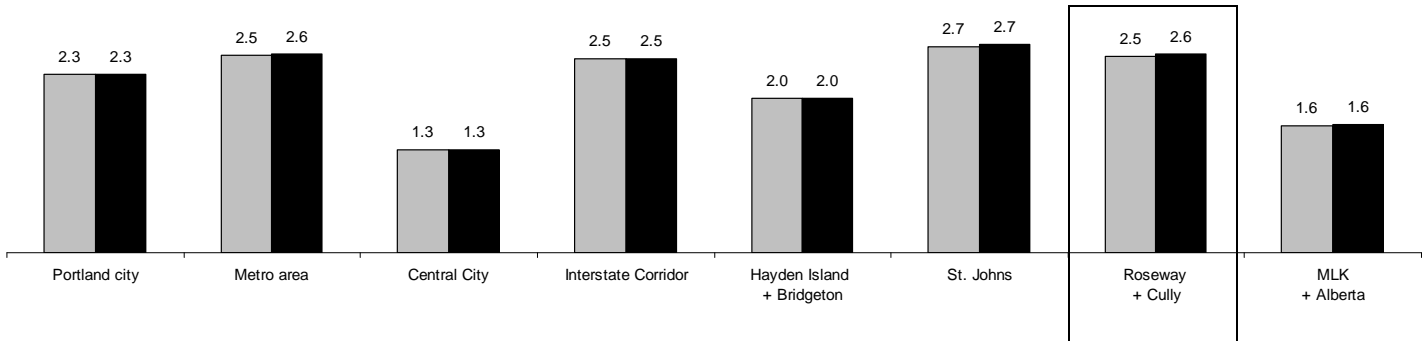
	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island Bridgeton	St. Johns	Roseway Cully	MLK Alberta
2010	2,226,000	589,000	30,931	33,855	4,223	33,262	34,333	37,215
2000	1,927,881	529,121	19,202	32,695	2,912	29,800	33,792	36,763
% change	12.9%	10.6%	61.1%	3.5%	45.0%	11.6%	1.6%	1.2%

■ 2000 ■ 2010

Median Age

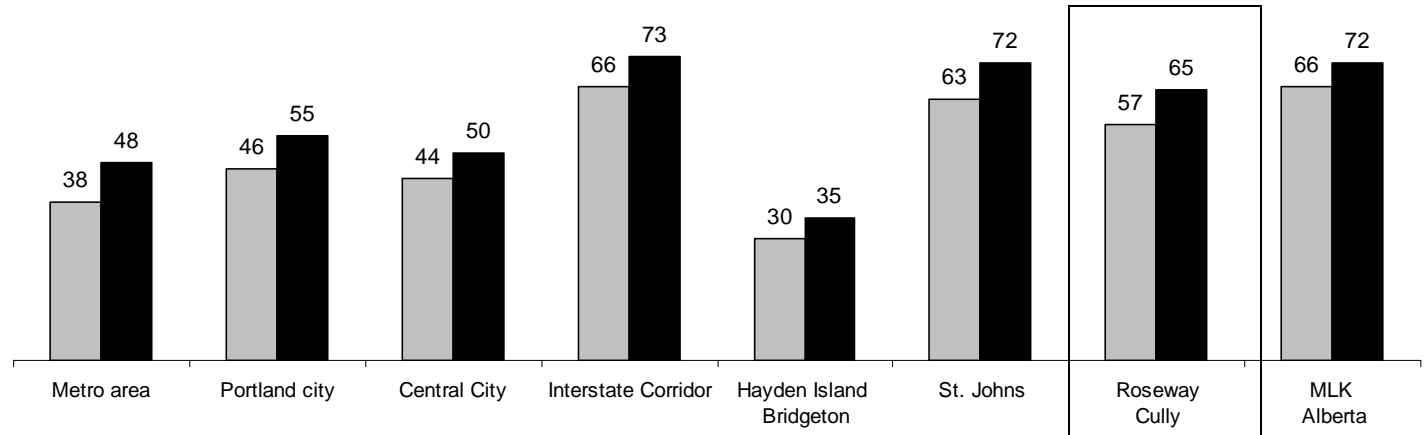


Average Household Size

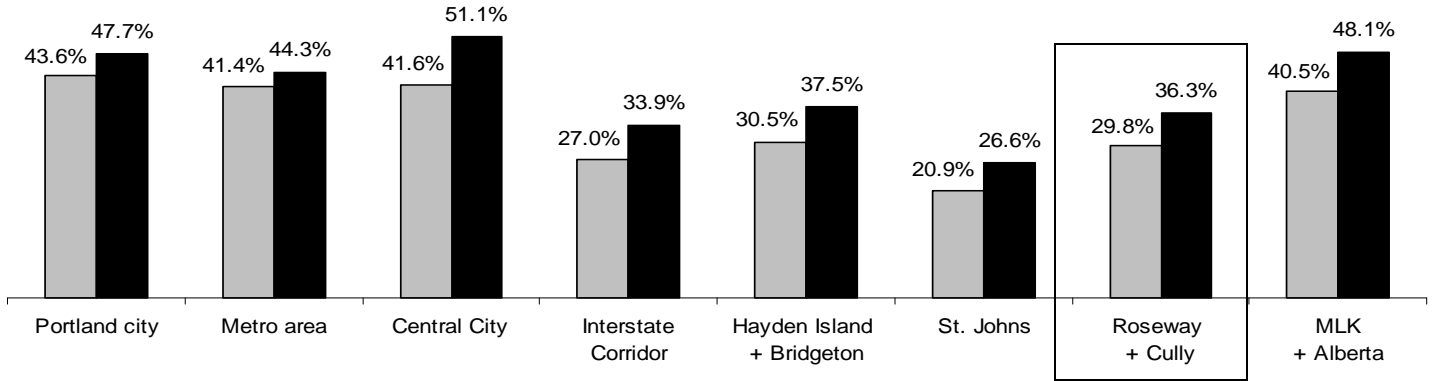


Diversity Index

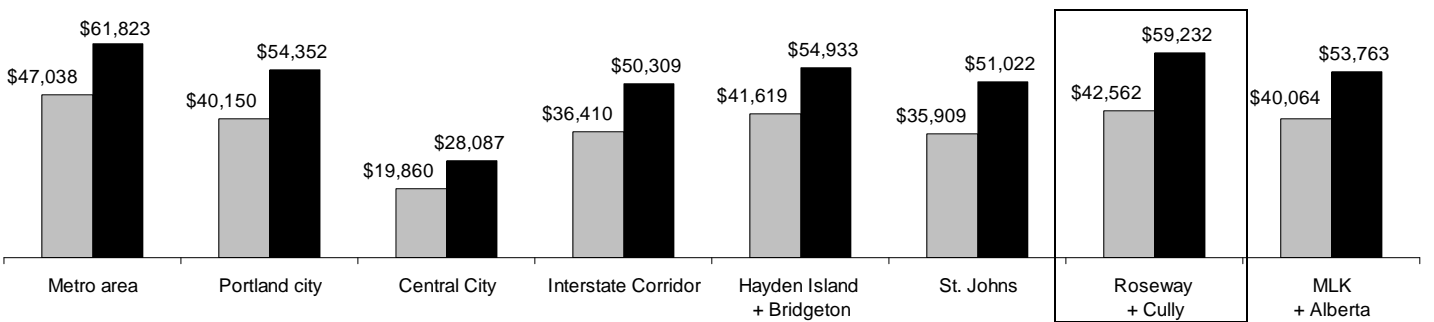
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



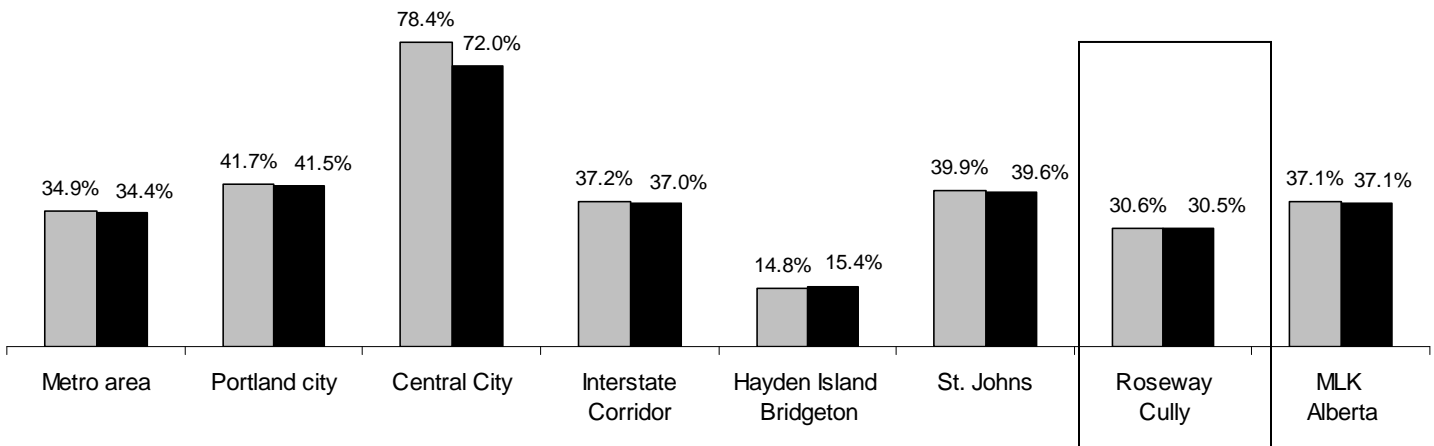
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island + Bridgeton	St. Johns	Roseway + Cully	MLK + Alberta
2010	273,500	253,184	400,314	197,371	79,875	\$192,095	223,725	\$236,154
2000	168,347	154,721	250,566	127,233	61,081	\$122,775	139,966	\$147,306
% change	62.5%	63.6%	59.8%	55.1%	30.8%	56.5%	59.8%	60.3%

Percent of Renters of Occupied Housing Units



Roseway-Cully Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

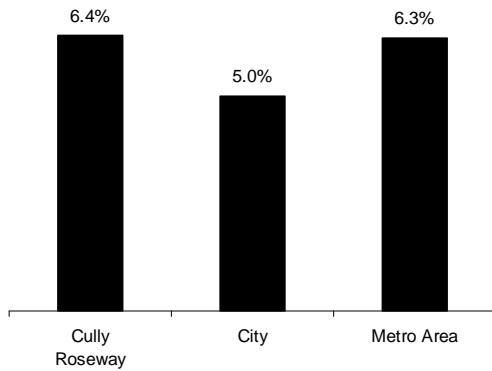
Roseway -Cully	City	Metro Area
1,241,745	51,937,895	107,875,146

OFFICE SPACE

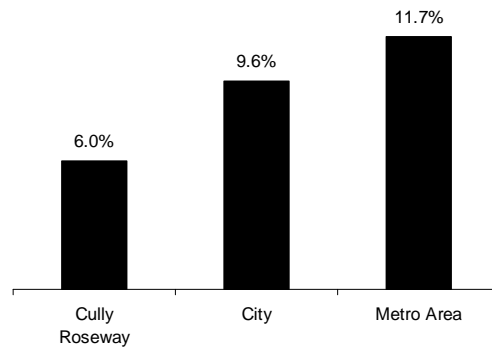
Square Feet

Roseway -Cully	City	Metro Area
658,265	54,348,765	92,465,455

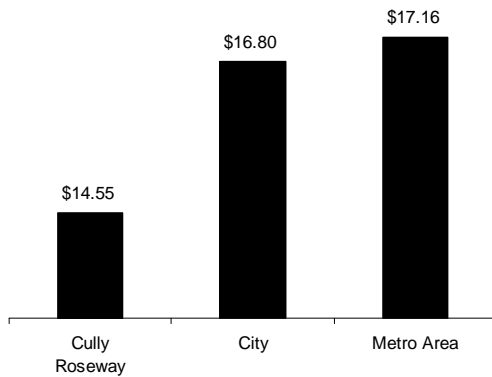
Retail Vacancy



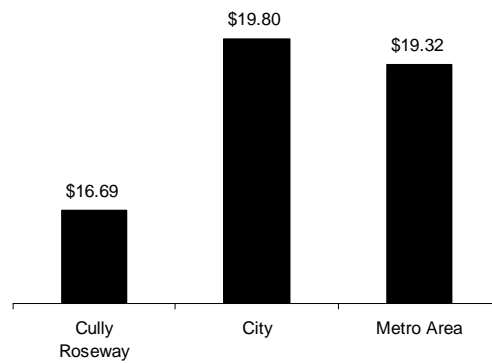
Office Vacancy



Retail Rents



Office Rents



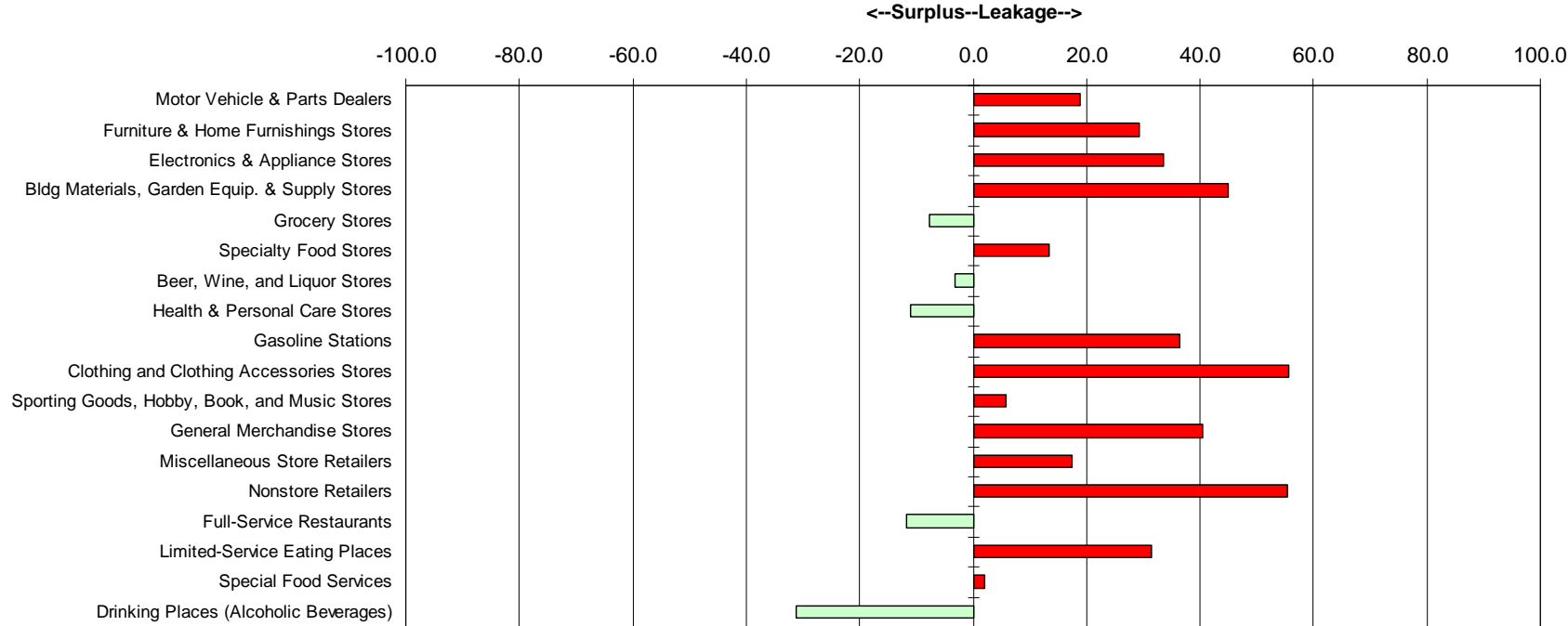
Roseway-Cully Analysis Area

Retail Market Profile

Retail Gap = \$94 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$340,695,142	\$246,726,593	\$93,968,549	16.0	270
Total Retail Trade (NAICS 44-45)	\$290,449,635	\$198,905,787	\$91,543,848	18.7	181
Total Food & Drink (NAICS 722)	\$50,245,507	\$47,820,806	\$2,424,701	2.5	89

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Roseway-Cully Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

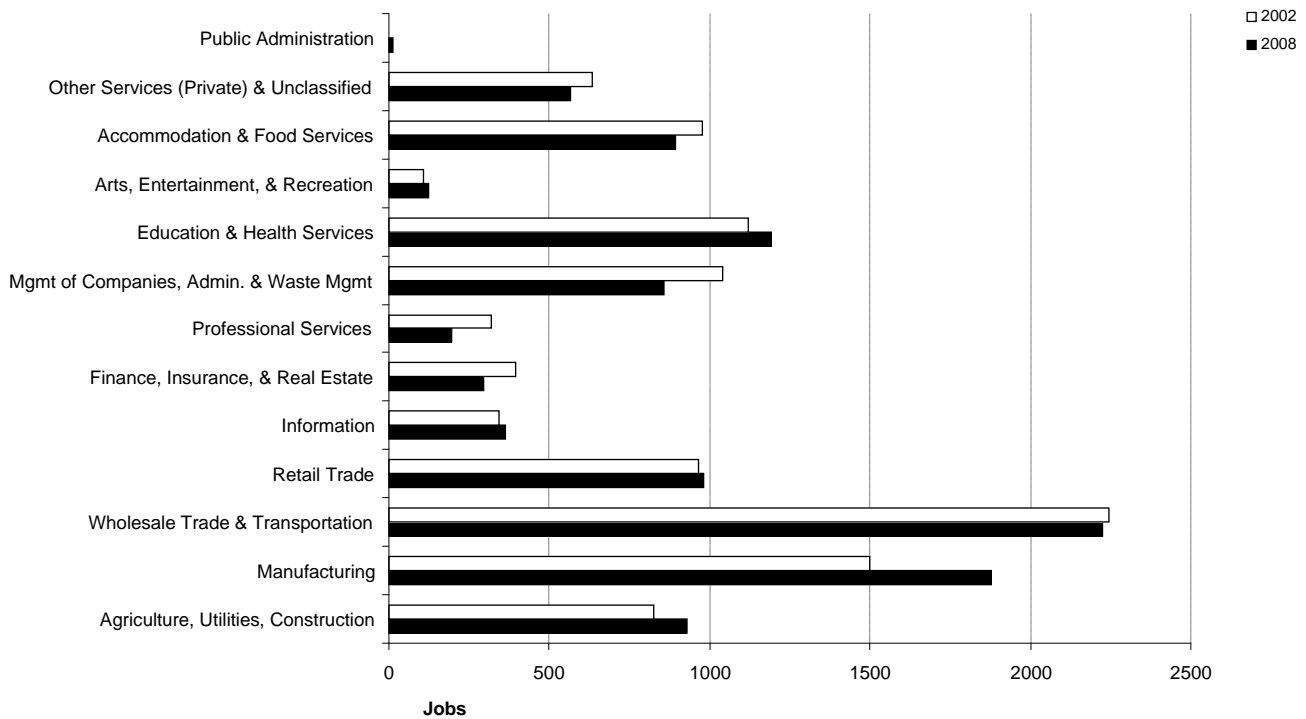
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

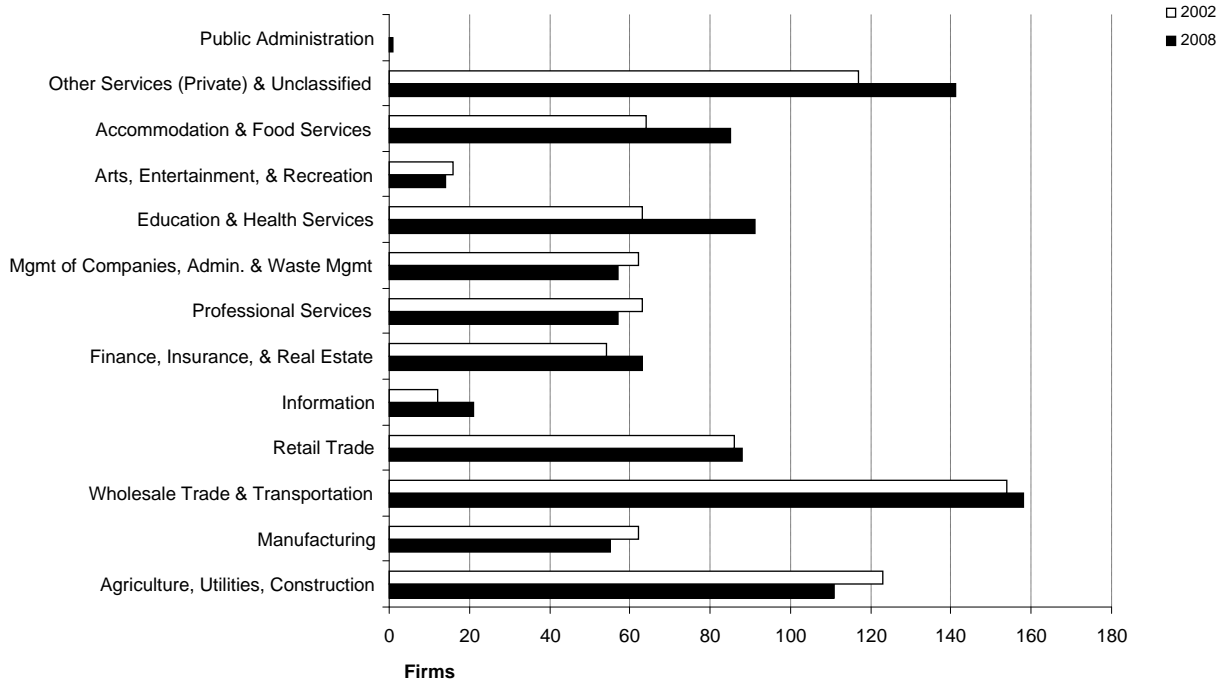
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	10,467	10,510	+43
Total Firms	876	942	+66
Average Annual Wages	\$30,686	\$38,131	+\$7,445

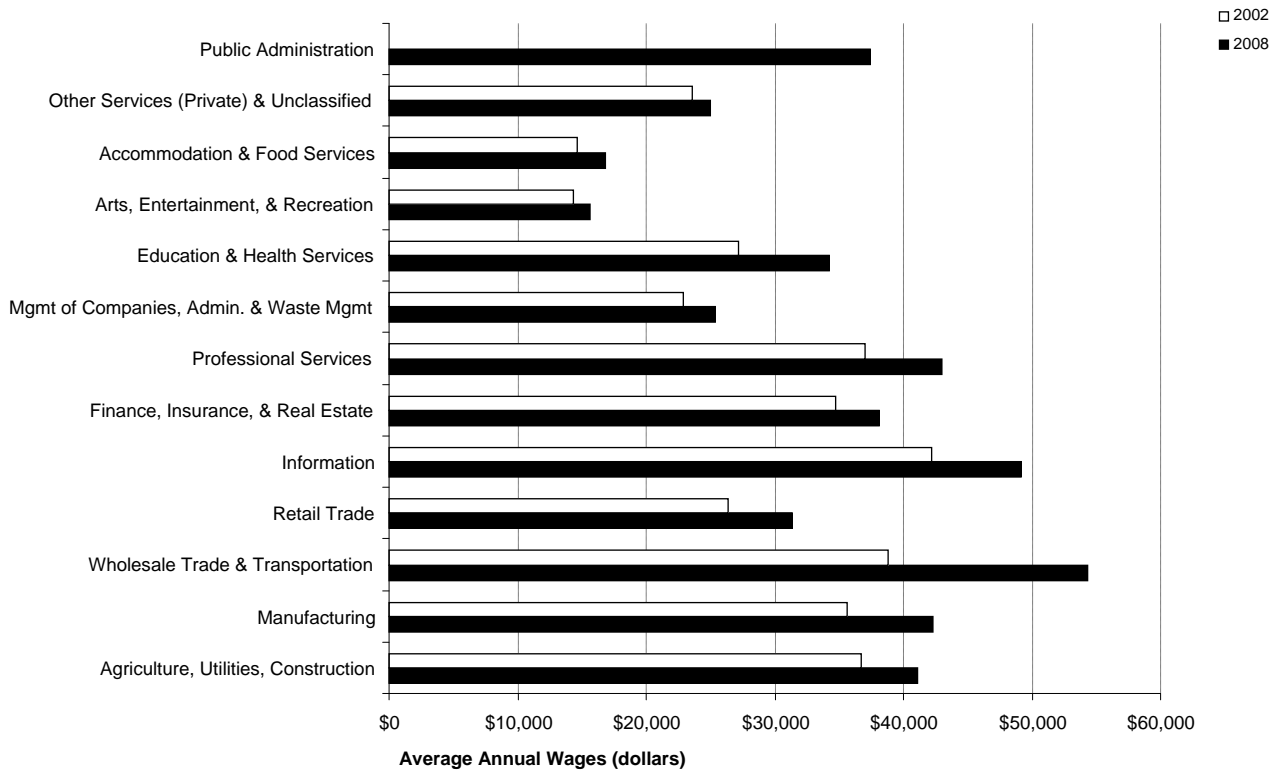
Total Jobs



Total Firms



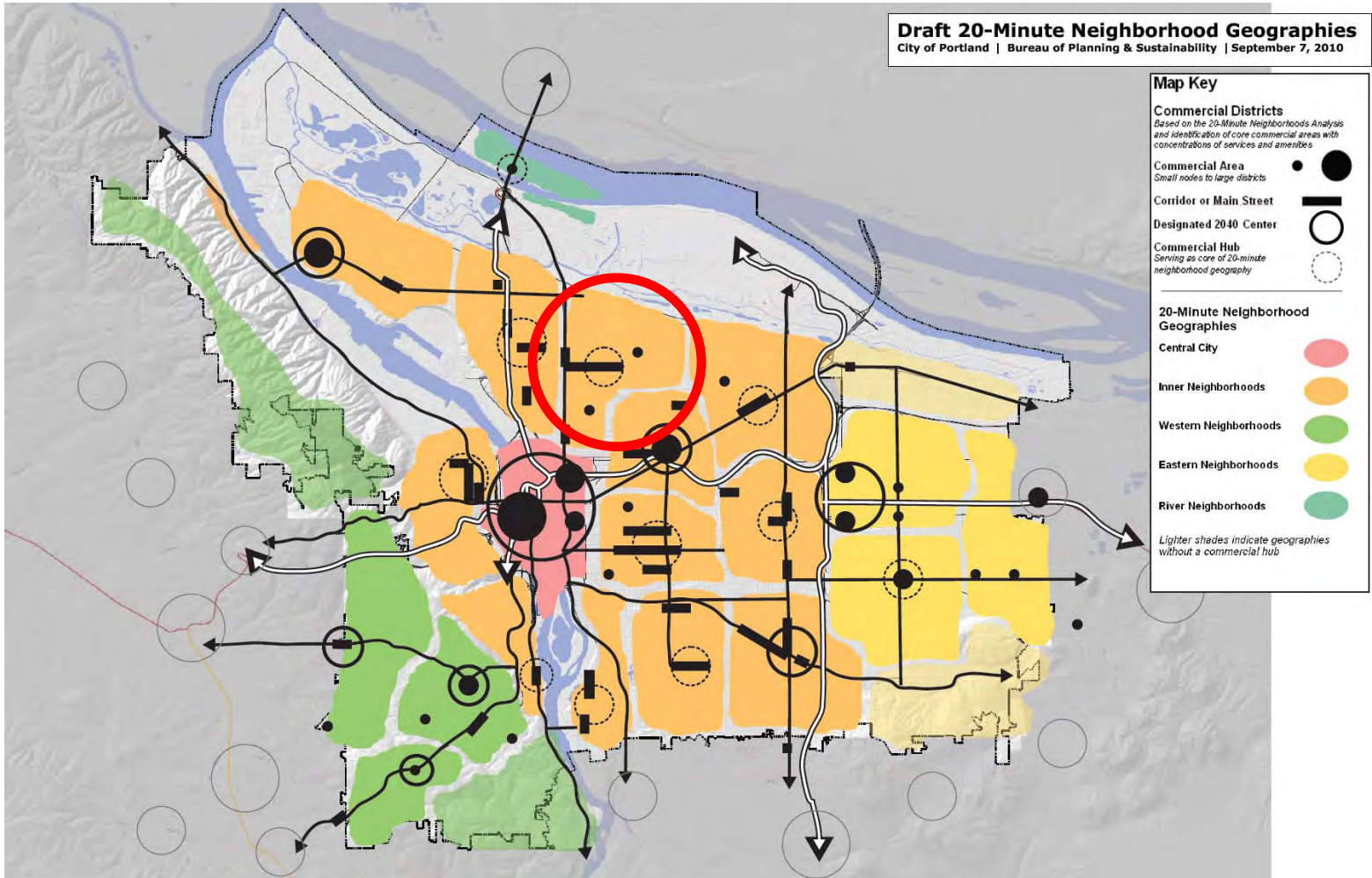
Average Annual Wages



MLK-Alberta Analysis Area

Including King, Vernon, Woodlawn, Concordia, Sabin, and parts of the Irvington, Eliot, Alameda, and Beaumont-Wilshire neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

MLK-Alberta Analysis Area

Services and Amenities

Population: 37,200 people (16,500 households)
Land Area: 5.2 square miles (7,200 people per sq. mile)

Commercial Districts

The area's primary concentrations of commercial services are located along the Alberta main street and along Martin Luther King, Jr. Boulevard. Smaller groupings of commercial services include nodes on NE Killingsworth at 28th and 33rd avenues, at the Dekum Triangle in the Woodlawn neighborhood, at NE 15th & Fremont, and along NE 42nd at the area's eastern edge.

Grocery stores: 4

Community Amenities

Community Centers: None

Libraries: 1 (Albina Library)

Parks and Open Spaces: 139 acres - including Alberta, Irving, Woodlawn, Fernhill, and Wilshire parks.

Tree Canopy Coverage: 18%

Public Schools: 5 K-8 schools (Faubion, Irvington, King, Sabin, Vernon, Woodlawn)

Colleges (campus): 1 (Concordia University)

Hospitals: None

Farmers Markets: 1 (King Farmers Market)

Transit Centers/Stations: None

Walkable Access Score: 65 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

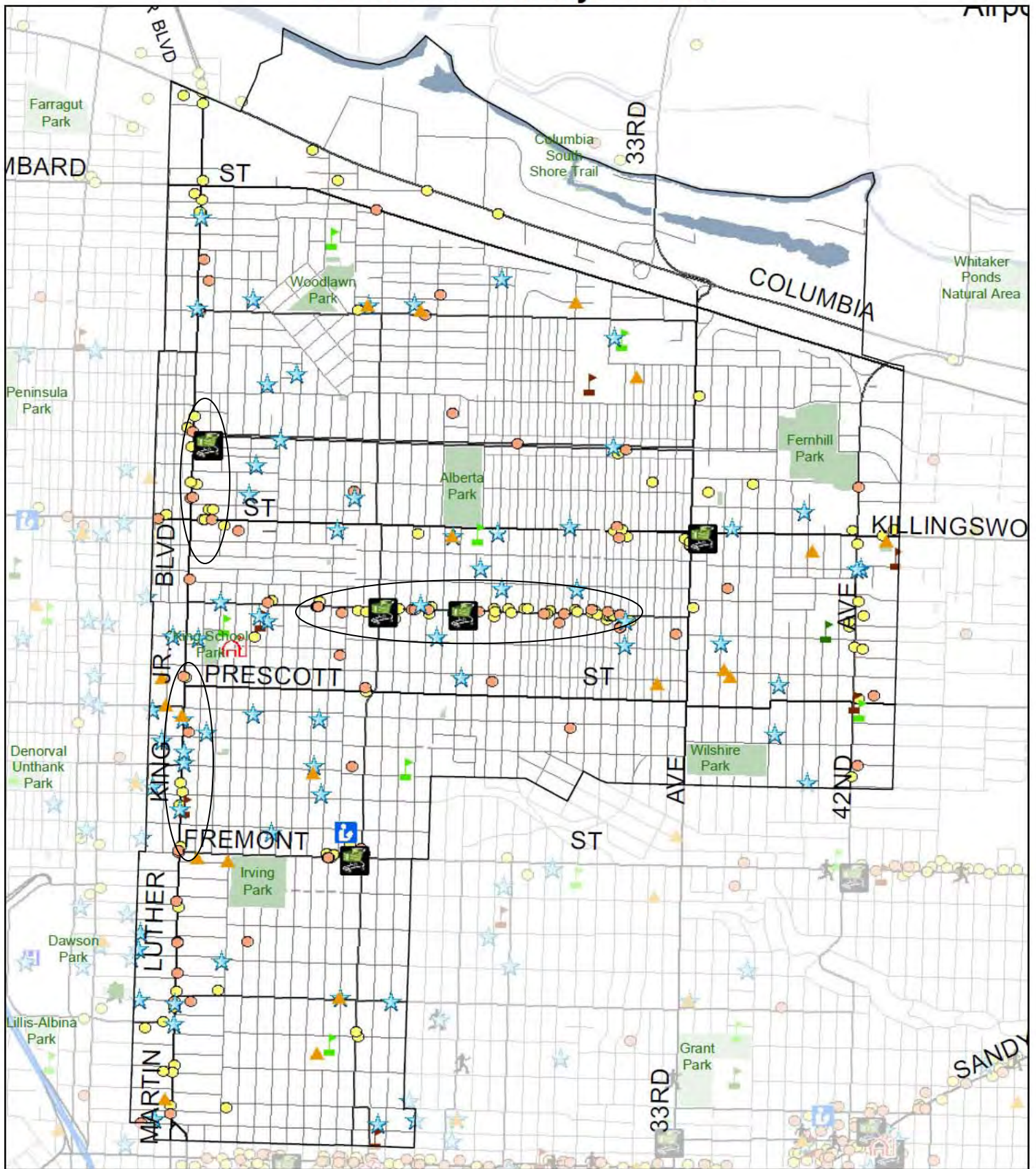
Within 1/2 mile of a park:	94%
Within 1/2 mile of a public elementary school:	53%
Within 3 miles of a full-service community center:	86%
Within 1/2 mile of a full-service grocery store:	46%
Within 1/4 mile of a frequent service transit stop:	82%

Neighborhood and Business Associations

Neighborhood Associations: King, Vernon, Woodlawn, Concordia, Sabin, and parts of Irvington, Eliot, Alameda, and Beaumont-Wilshire

Business Associations: Alberta, North-Northeast, and 42nd Avenue business associations

MLK-Alberta Analysis Area



Services and Amenities

-  Type 1 Commercial
-  Places of Worship
-  Public HS
-  Type 2 Commercial
-  Farmers Markets
-  Public K-8
-  Fitness Centers
-  Libraries
-  Private Schools
-  Grocery Stores
-  Community Centers
-  Daycare Centers



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March 25, 2011



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commercial data from InfoUSA 2008

MLK-Alberta Analysis Area



Transit Infrastructure

-  MAX
-  Streetcar
-  Frequent Service
-  Standard Service
-  Rush-Hour Only Service



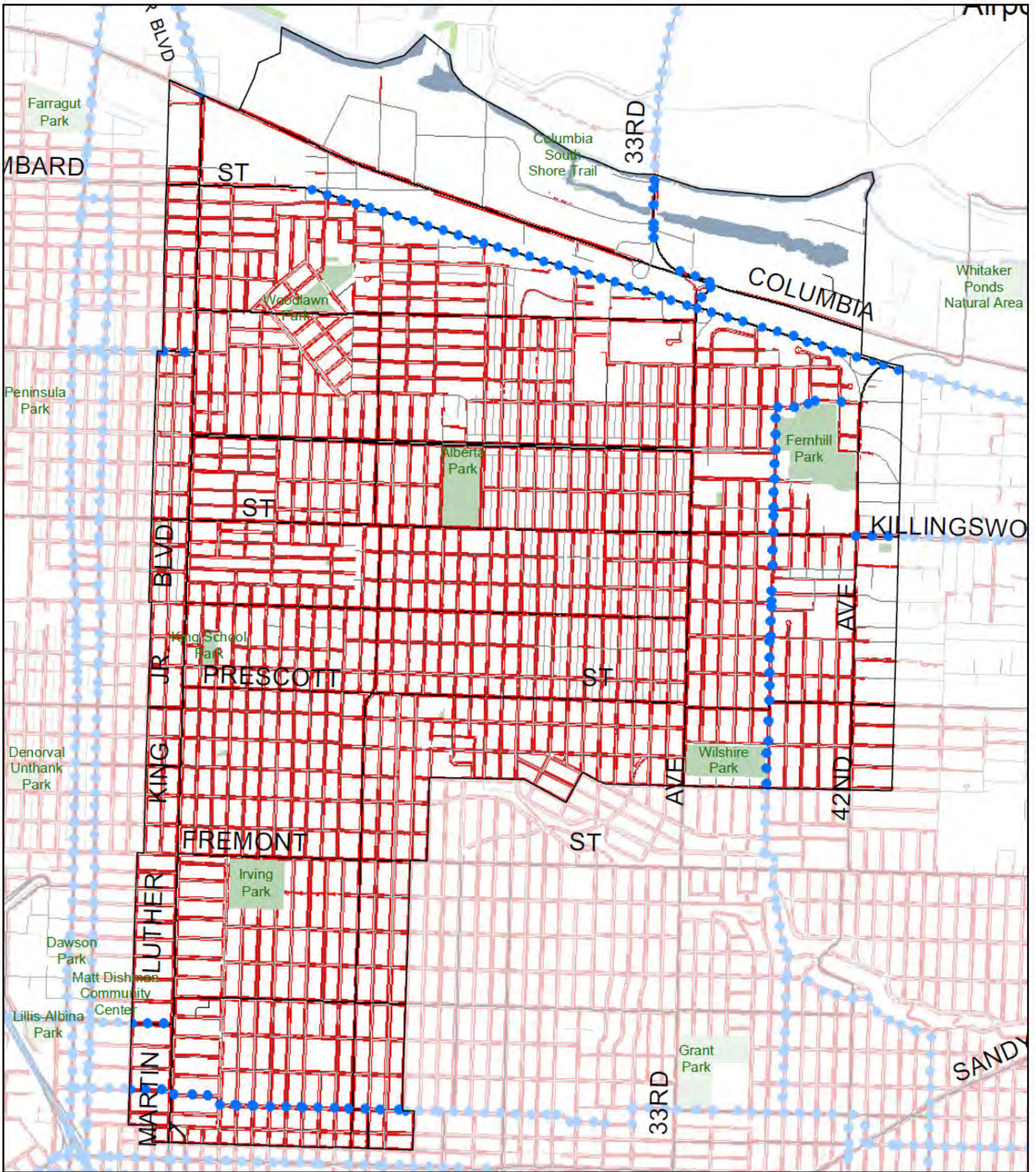
0 750 1,500 3,000 Feet



May 12, 2011

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MLK-Alberta Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

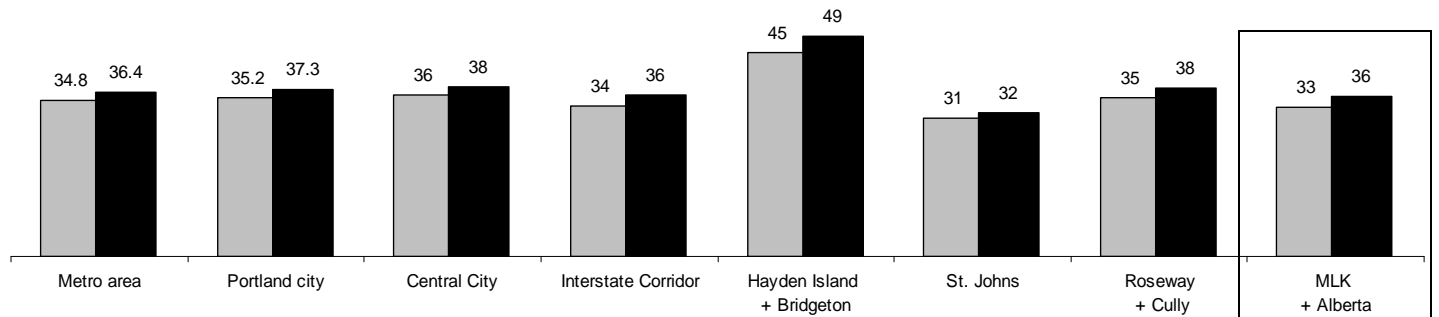
MLK-Alberta Analysis Area Demographics (2000 – 2010)

Population

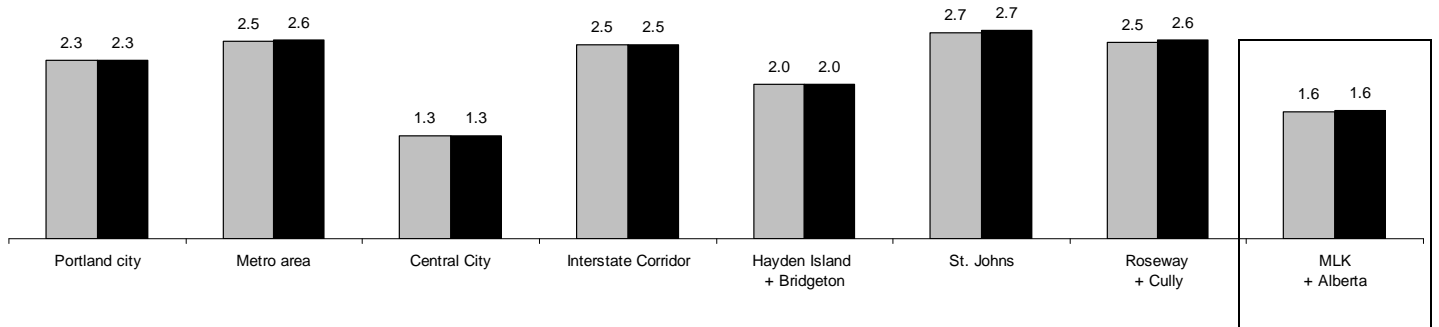
	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island Bridgeton	St. Johns	Roseway Cully	MLK Alberta
2010	2,226,000	589,000	30,931	33,855	4,223	33,262	34,333	37,215
2000	1,927,881	529,121	19,202	32,695	2,912	29,800	33,792	36,763
% change	12.9%	10.6%	61.1%	3.5%	45.0%	11.6%	1.6%	1.2%

■ 2000 ■ 2010

Median Age

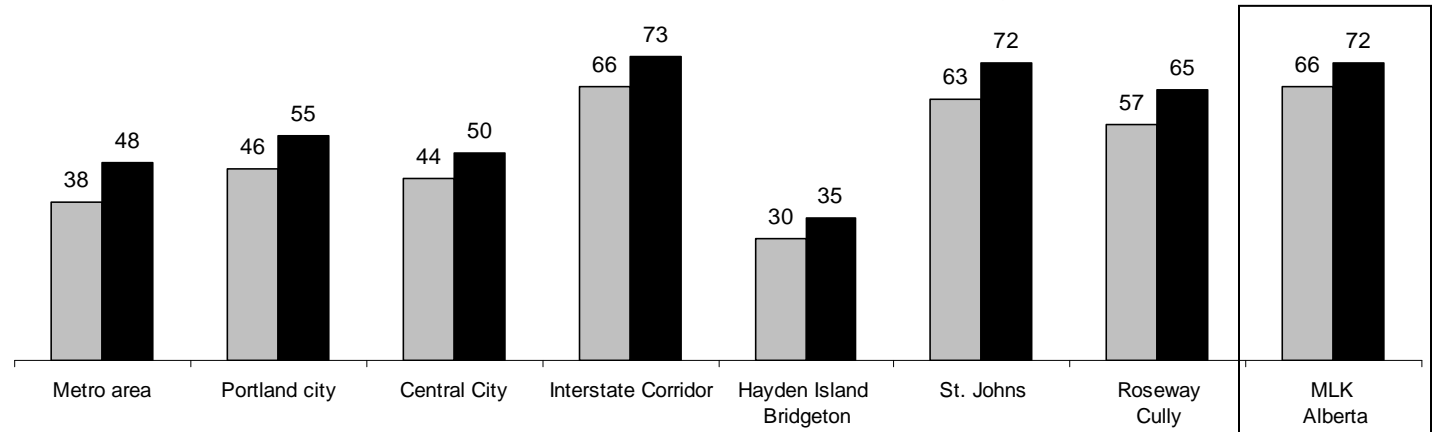


Average Household Size

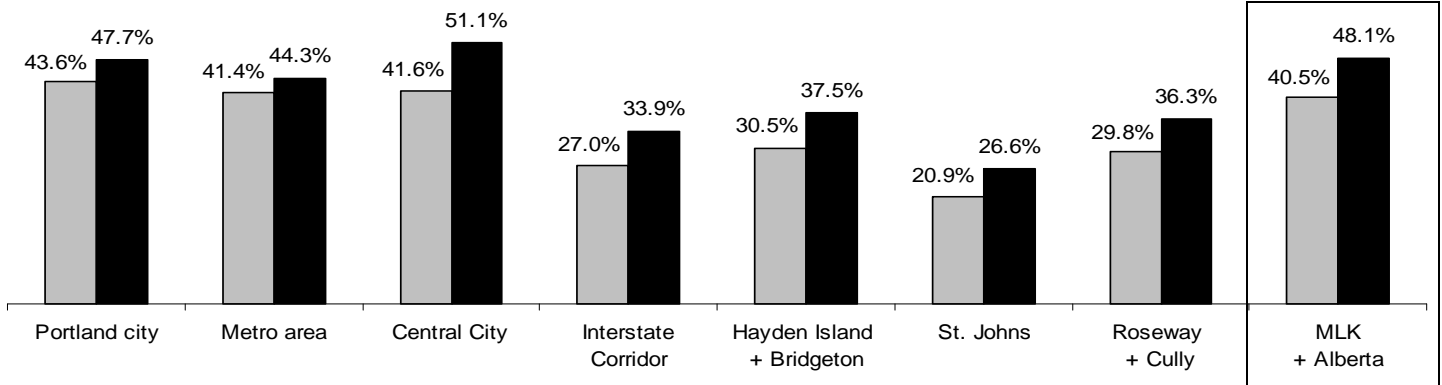


Diversity Index

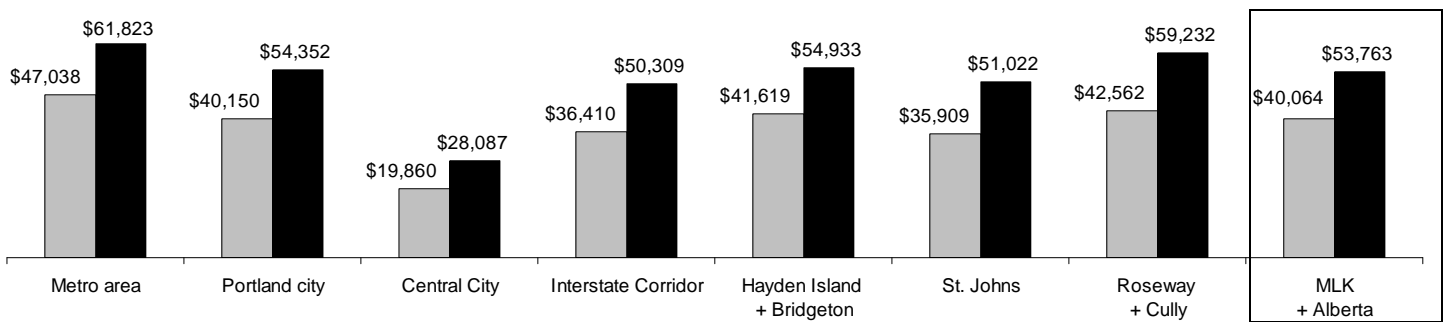
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



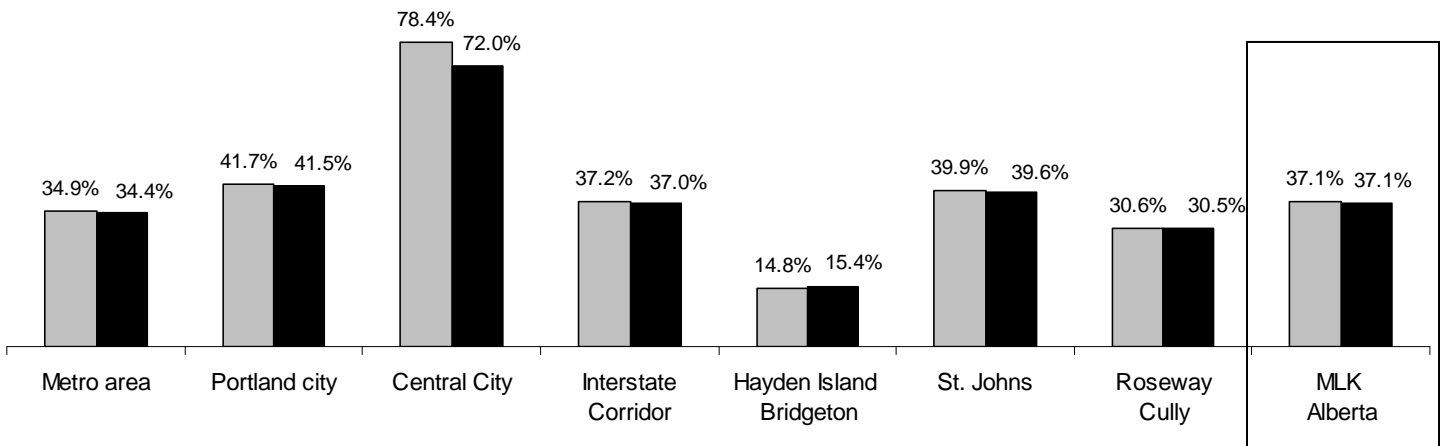
Median Income



Median Home Value

	Metro area	Portland city	Central City	Interstate Corridor	Hayden Island + Bridgeton	St. Johns	Roseway + Cully	MLK + Alberta
2010	273,500	253,184	400,314	197,371	79,875	\$192,095	223,725	\$236,154
2000	168,347	154,721	250,566	127,233	61,081	\$122,775	139,966	\$147,306
% change	62.5%	63.6%	59.8%	55.1%	30.8%	56.5%	59.8%	60.3%

Percent of Renters of Occupied Housing Units



MLK-Alberta Analysis Area

Commercial Real Estate Indicators

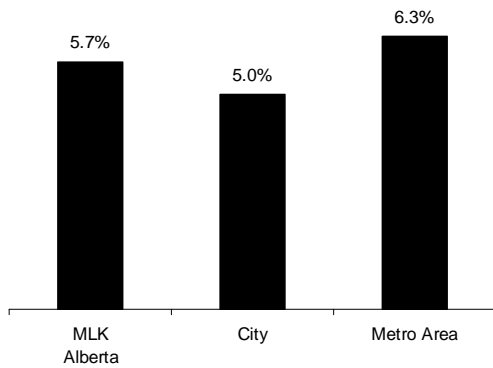
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

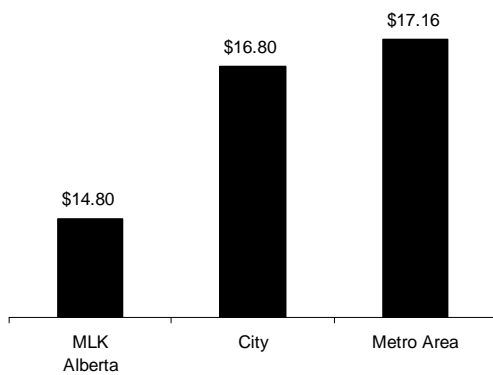
Square Feet

MLK Alberta	City	Metro Area
1,800,210	51,937,895	107,875,146

Retail Vacancy



Retail Rents

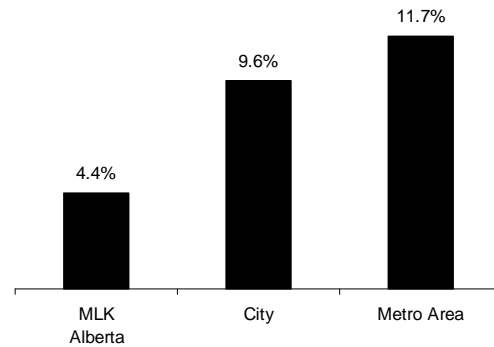


OFFICE SPACE

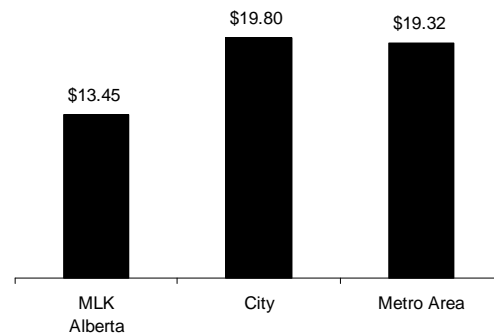
Square Feet

MLK Alberta	City	Metro Area
577,776	54,348,765	92,465,455

Office Vacancy



Office Rents



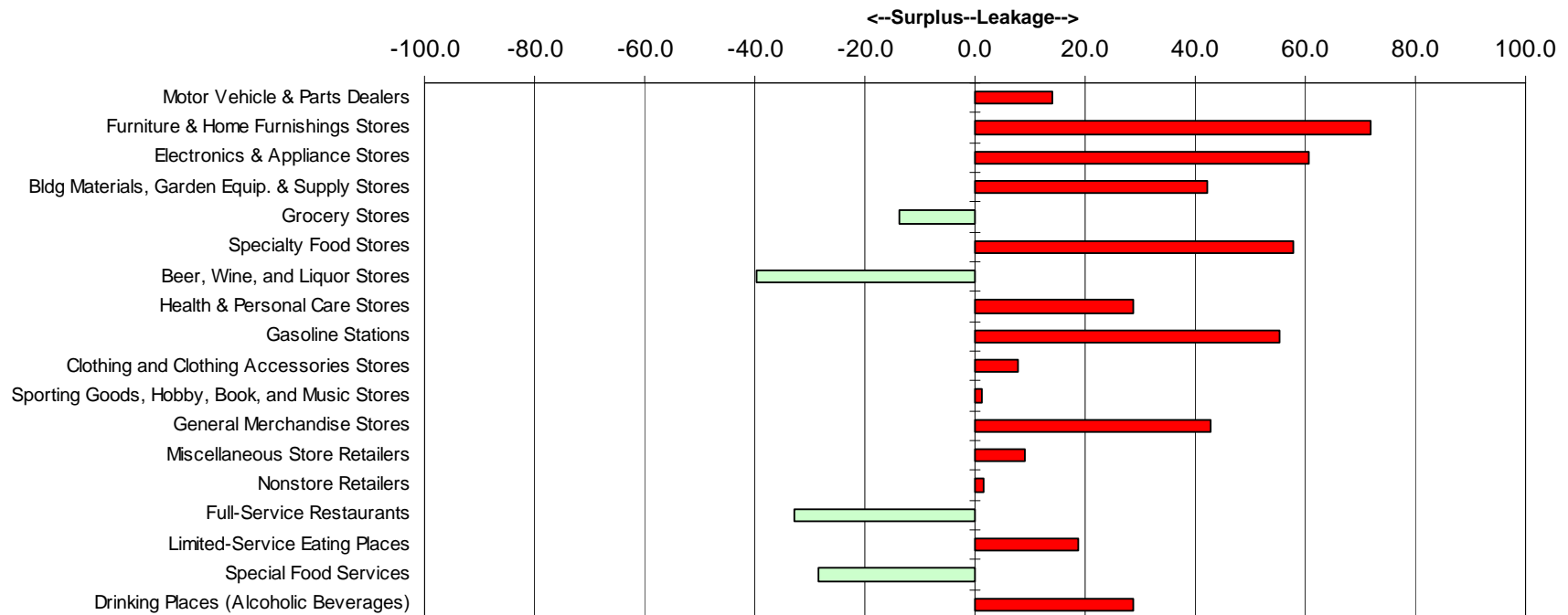
MLK-Alberta Analysis Area

Retail Market Profile

Retail Gap = \$94 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$372,488,652	\$295,445,625	\$77,043,027	11.5	313
Total Retail Trade (NAICS 44-45)	\$317,452,877	\$228,673,868	\$88,779,009	16.3	198
Total Food & Drink (NAICS 722)	\$55,035,775	\$66,771,757	-\$11,735,982	-9.6	115

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



MLK-Alberta Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

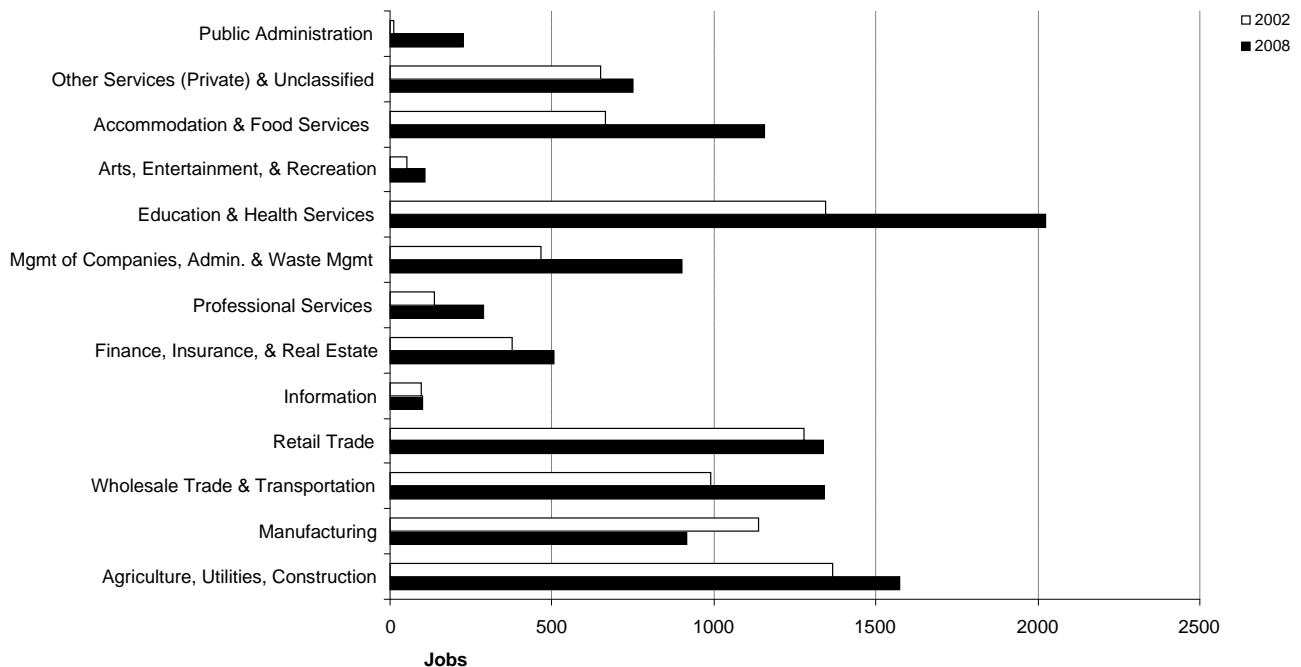
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

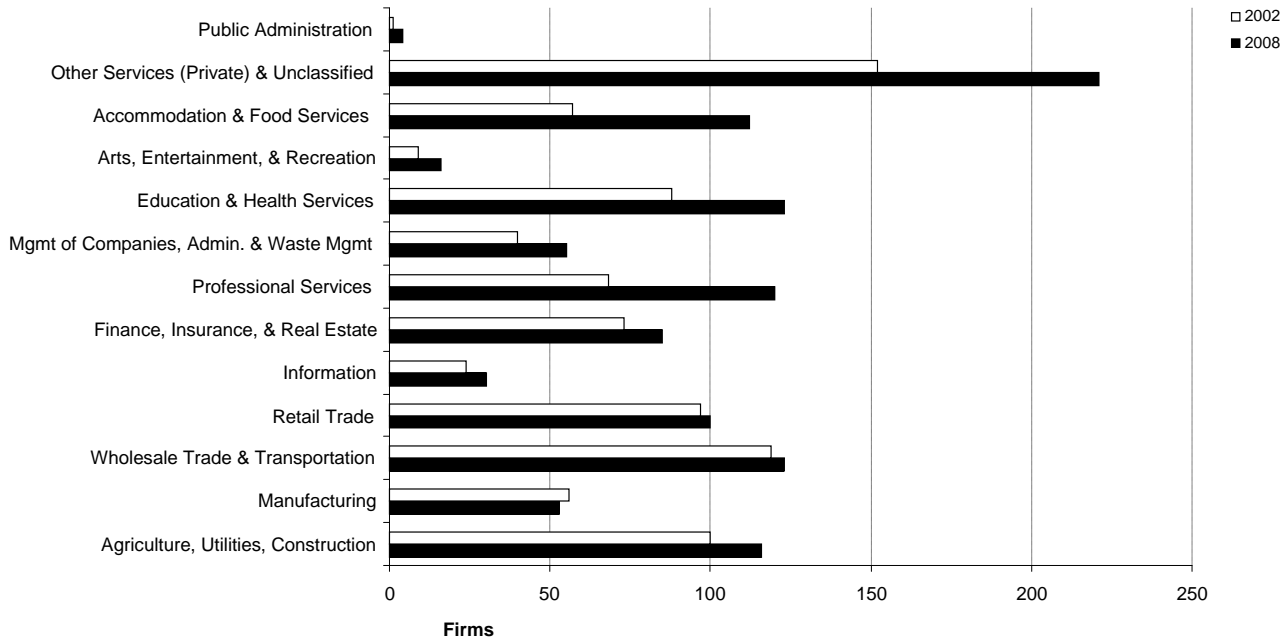
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	8,563	11,219	+2,656
Total Firms	884	1,158	+274
Average Annual Wages	\$32,662	\$38,569	+\$5,907

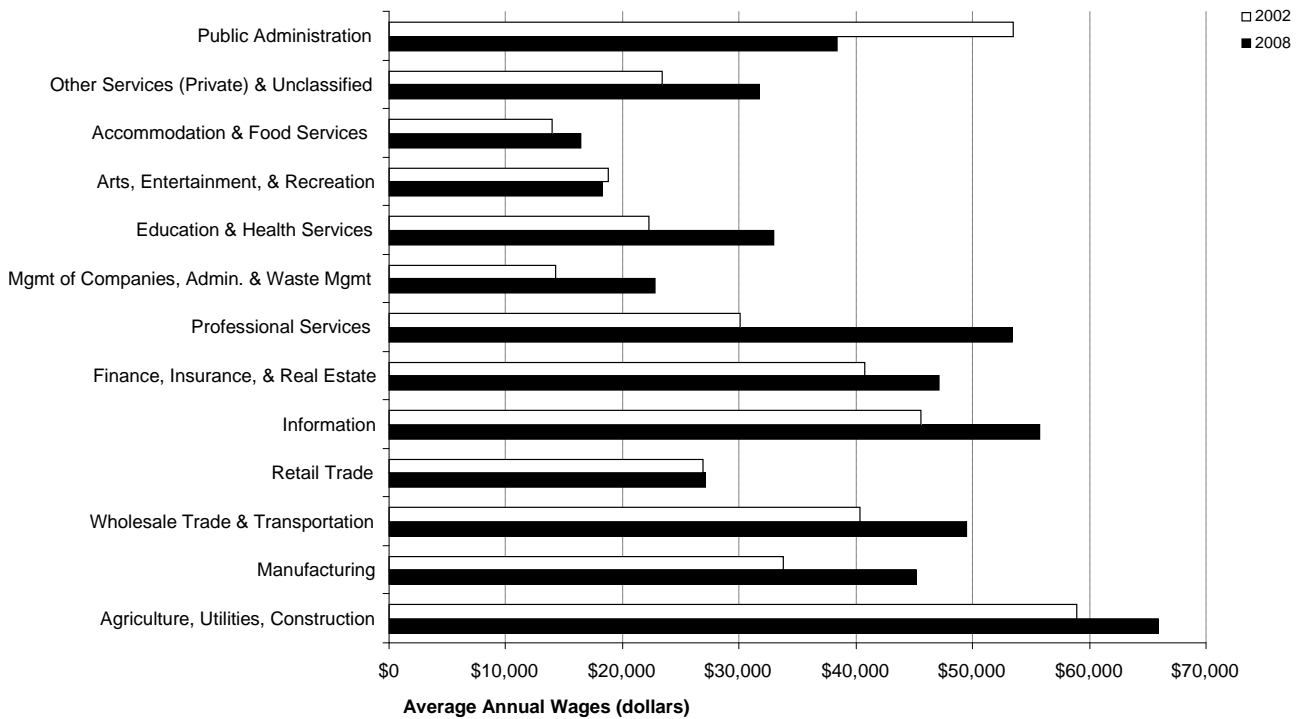
Total Jobs



Total Firms



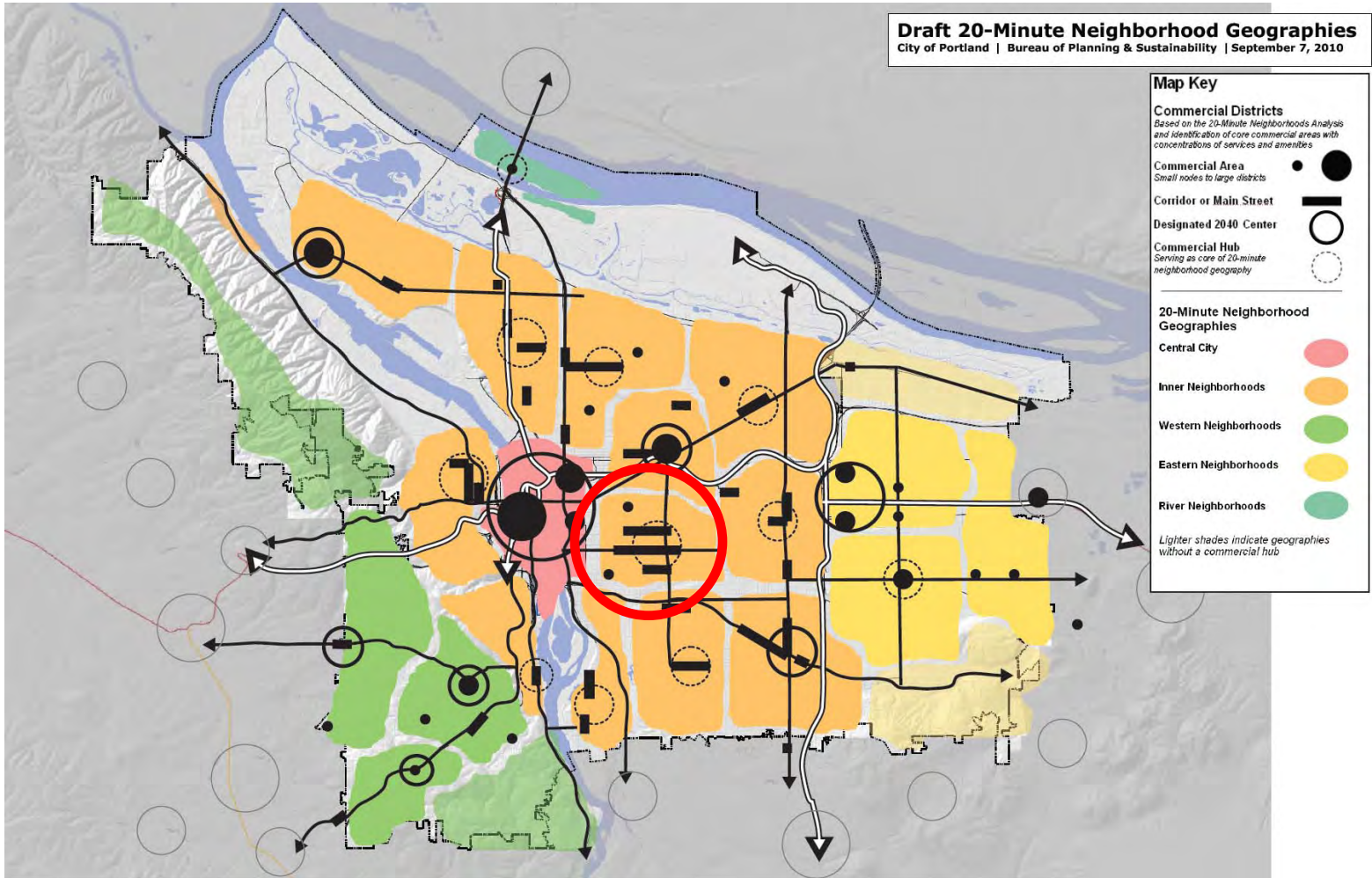
Average Annual Wages



Belmont-Hawthorne-Division Analysis Area

Including Buckman, Hosford-Abernethy, Sunnyside, Richmond, and parts of the Kerns, Laurelhurst, and Mt. Tabor neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Belmont-Hawthorne-Division Analysis Area

Services and Amenities

Population: 36,900 people (17,700 households)
Land Area: 3.7 square miles (10,100 people per sq. mile)

Commercial Districts

Characteristic of commercial districts in this area are its “main streets”, originally developed during the Streetcar Era of the late 19th and early 20th centuries. The primary main street corridors are along Belmont, Hawthorne, and Division, with secondary commercial areas along Burnside and on 28th Avenue near Burnside. Smaller commercial nodes are scattered elsewhere in the district. Among these are nodes at SE Clinton and 26th Avenue and on SE Stark near 28th Avenue.

Grocery stores: 6

Community Amenities

Community Centers: None

Libraries: 1 (Belmont Library)

Parks and Open Spaces: 95 acres - including Laurelhurst, Colonel Summers, Sewellcrest and Clinton parks.

Tree Canopy Coverage: 23%

Public Schools: 2 high schools (Cleveland*, Franklin)

9 K-8 schools (Abernethy Elementary, Atkinson Elementary*, Buckman Arts Elementary, Da Vinci Arts Middle School, Glencoe Elementary*, Hosford Middle School, Mt. Tabor Middle School*, Richmond Elementary, Sunnyside Environmental K-8)

**At edge of analysis area*

Colleges (campus): 2 specialized (Multnomah Bible College & Seminary, Western Seminary)

Hospitals: None

Farmers Markets: 2 (Buckman Farmers Market, People’s Farmers Market)

Transit Centers/Stations: None

Walkable Access Score: 79 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

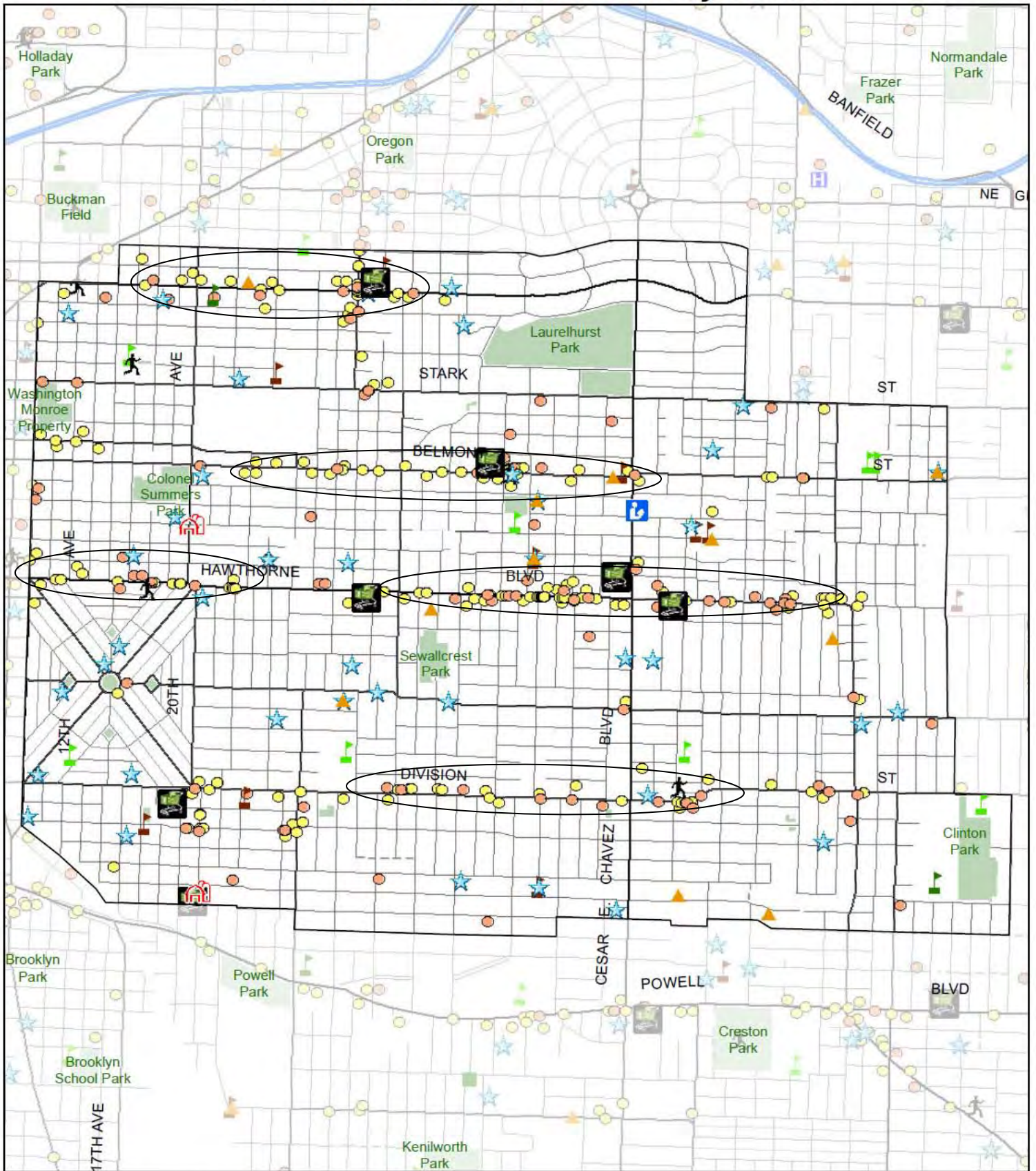
Within 1/2 mile of a park:	100%
Within 1/2 mile of a public elementary school:	52%
Within 3 miles of a full-service community center:	57%
Within 1/2 mile of a full-service grocery store:	59%
Within 1/4 mile of a frequent service transit stop:	87%

Neighborhood and Business Associations

Neighborhood Associations: Buckman, Hosford-Abernethy, Sunnyside, Richmond, and parts of Kerns, Laurelhurst, and Mt. Tabor

Business Associations: Belmont Area, Hawthorne Boulevard, Division/Clinton, and East Burnside business associations

Belmont-Hawthorne-Division Analysis Area



Services and Amenities

- Type 1 Commercial
- Places of Worship
- Public HS
- Type 2 Commercial
- Farmers Markets
- Public K-8
- Fitness Centers
- Libraries
- Private Schools
- Grocery Stores
- Community Centers
- Daycare Center



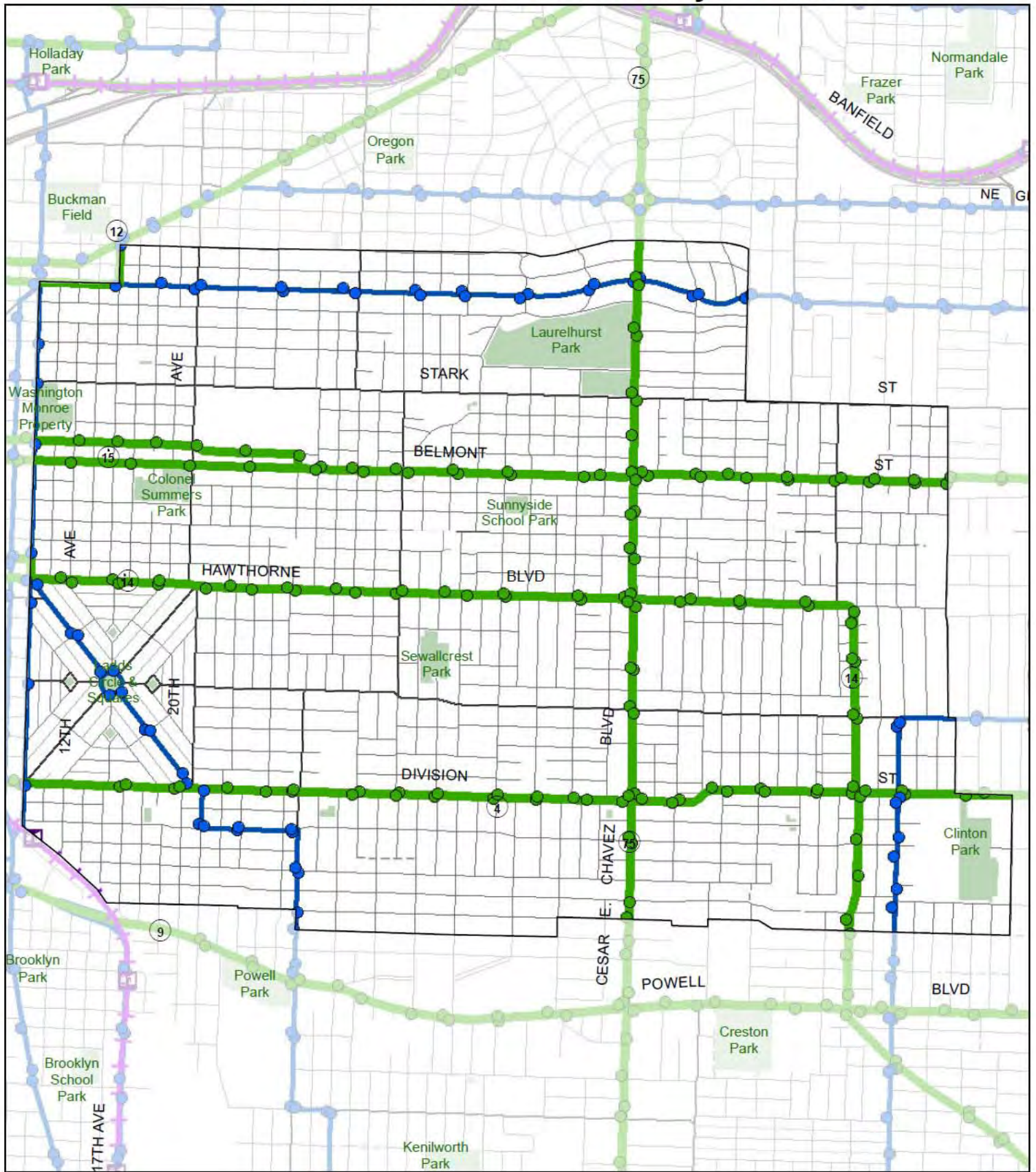
City of Portland Bureau of
Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director

750 1,500 3,000
Feet March 25, 2011

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commercial data from InfoUSA 2008

Belmont-Hawthorne-Division Analysis Area

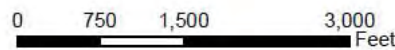


Transit Infrastructure

-  MAX
-  Streetcar
-  Frequent Service
-  Standard Service
-  Rush-Hour Only Service



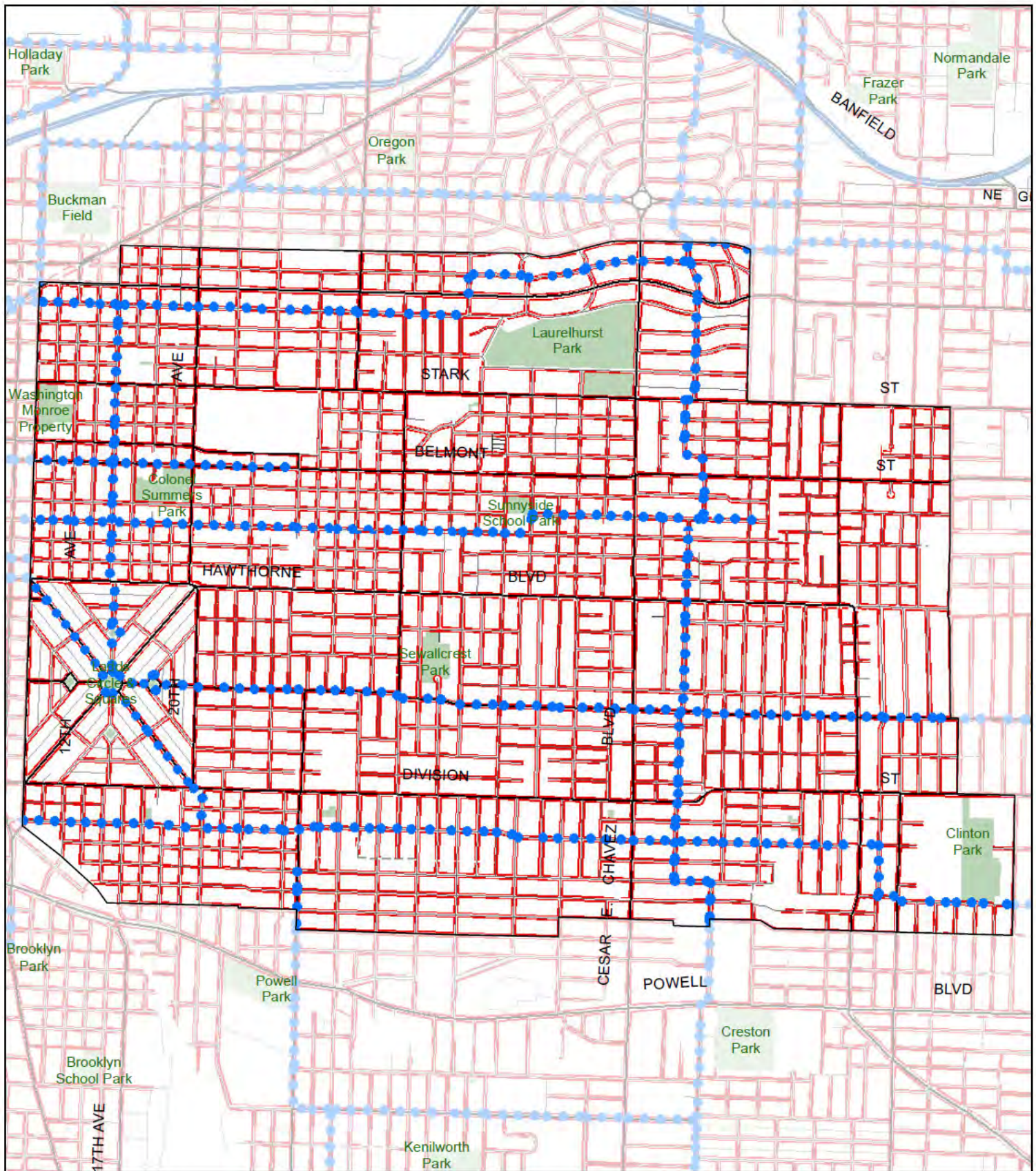
City of Portland Bureau of Planning & Sustainability
 Sam Adams, Mayor | Susan Anderson, Director



May 12, 2011

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Belmont-Hawthorne-Division Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



City of Portland Bureau of Planning & Sustainability
 Sam Adams, Mayor | Susan Anderson, Director



March 25, 2011

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Belmont-Hawthorne-Division Analysis Area

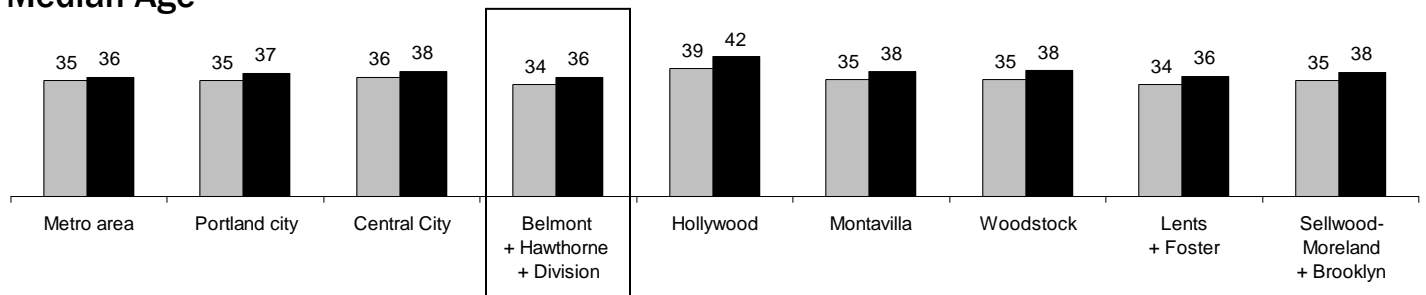
Demographics (2000 – 2010)

Population

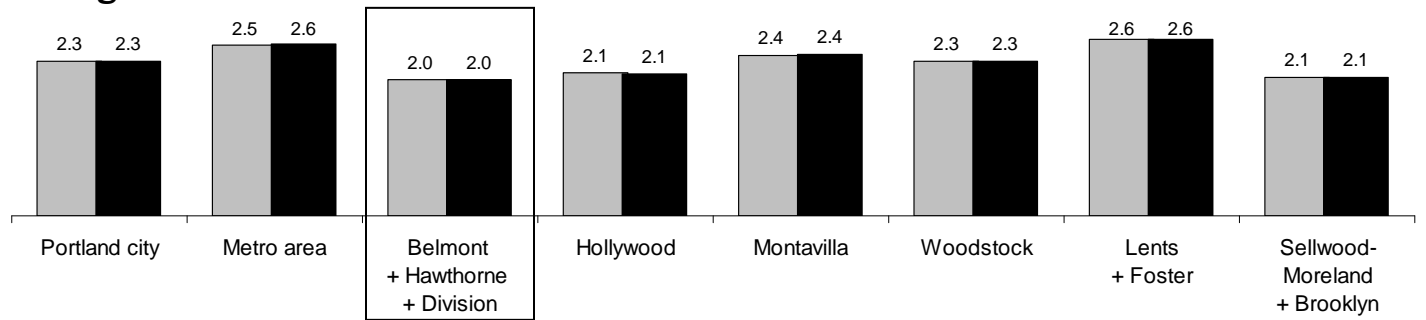
	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	2,226,000	589,000	30,931	36,907	30,699	31,581	31,266	43,891	15,349
2000	1,927,881	529,121	19,202	35,434	29,532	30,336	30,357	40,472	14,448
% change	12.9%	10.6%	61.1%	4.2%	4.0%	4.1%	3.0%	8.4%	6.2%

■ 2000 ■ 2010

Median Age

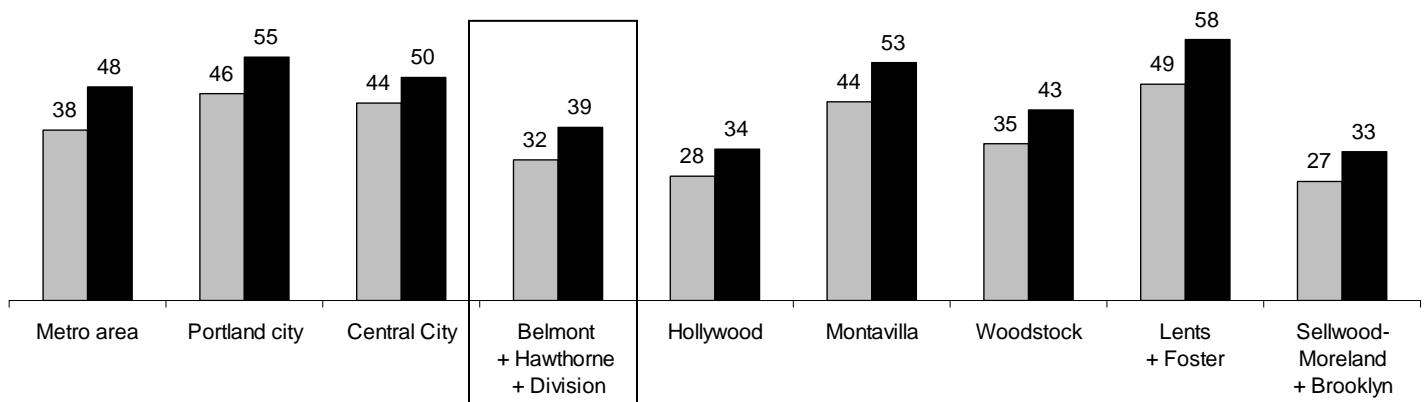


Average Household Size

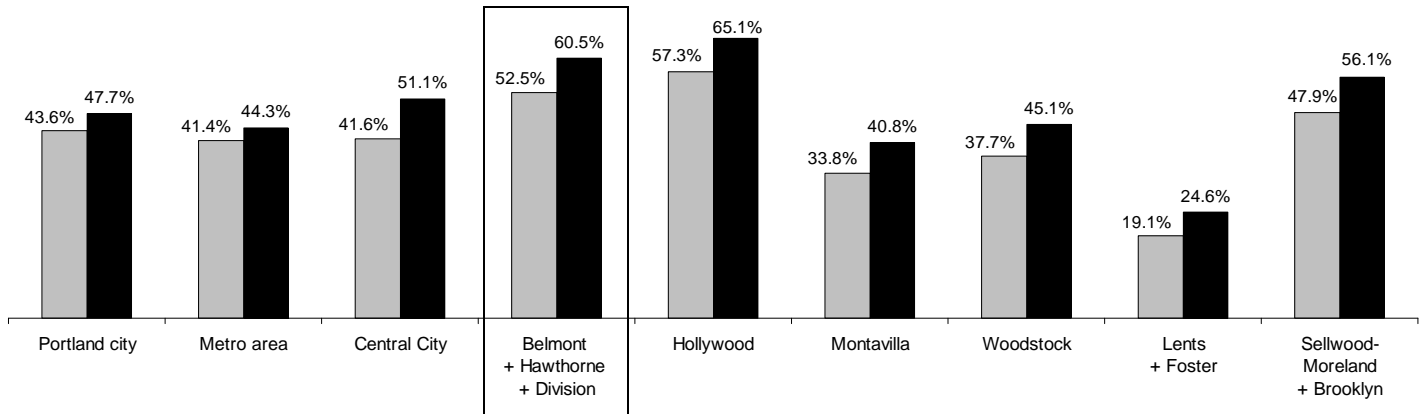


Diversity Index

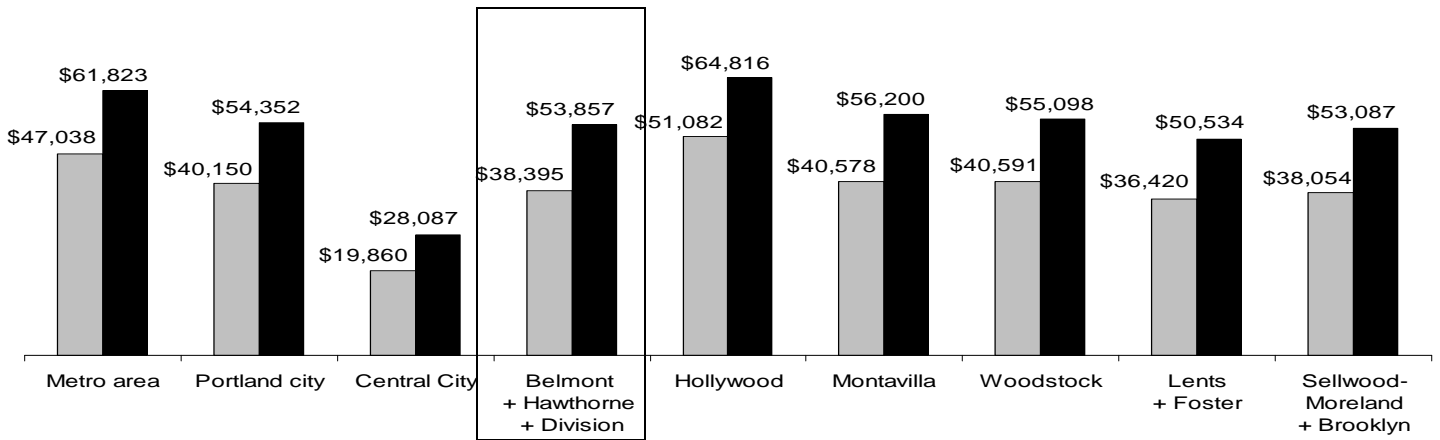
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



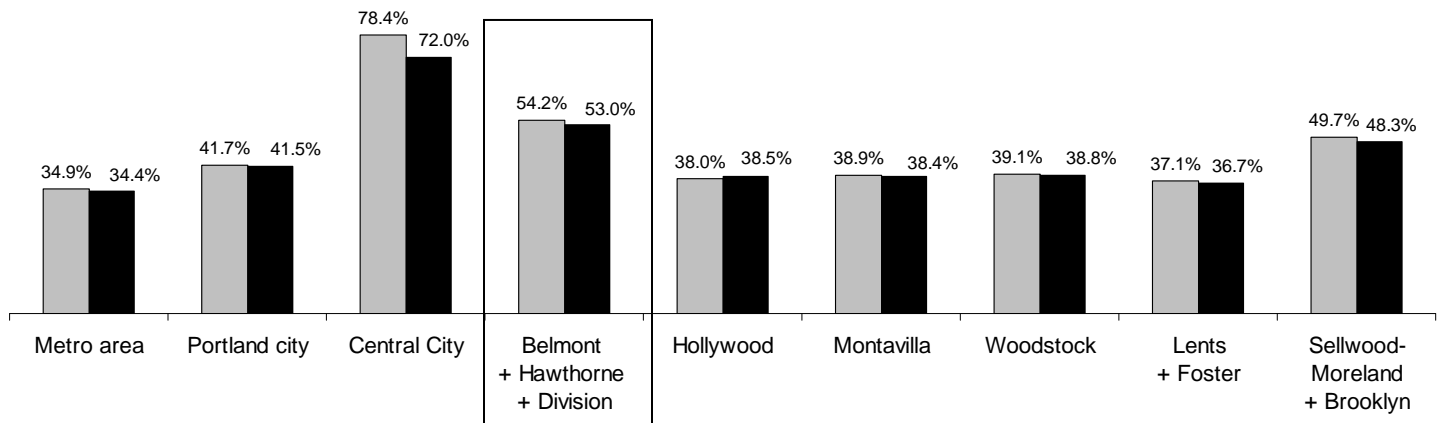
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	273,500	253,184	400,314	302,669	\$368,711	\$226,609	\$247,365	\$191,470	\$284,198
2000	168,347	154,721	250,566	181,054	\$223,268	\$141,422	\$152,397	\$120,837	\$170,779
% change	62.5%	63.6%	59.8%	67.2%	65.1%	60.2%	62.3%	58.5%	66.4%

Percent of Renters of Occupied Housing Units



Belmont-Hawthorne-Division Analysis Area

Commercial Real Estate Indicators

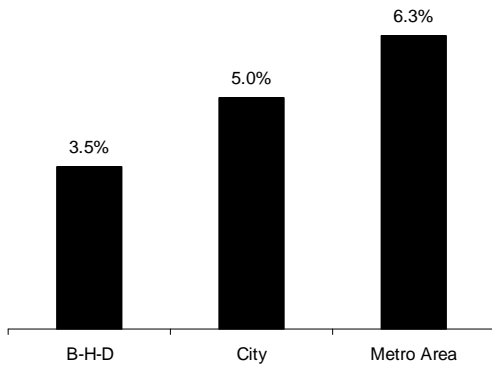
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

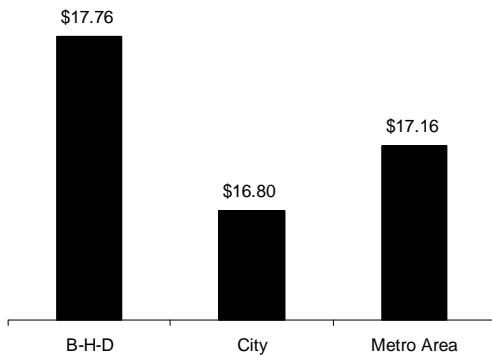
Square Feet

B-H-D	City	Metro Area
2,482,330	51,937,895	107,875,146

Retail Vacancy



Retail Rents

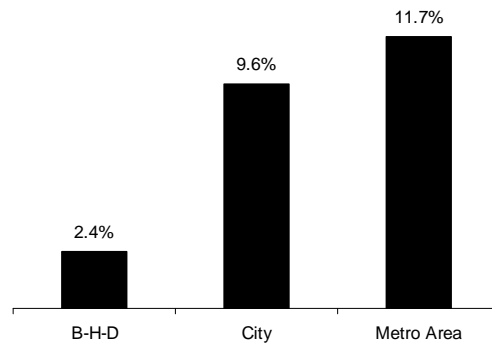


OFFICE SPACE

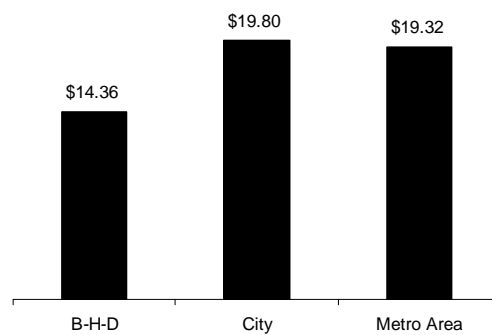
Square Feet

B-H-D	City	Metro Area
837,418	54,348,765	92,465,455

Office Vacancy



Office Rents



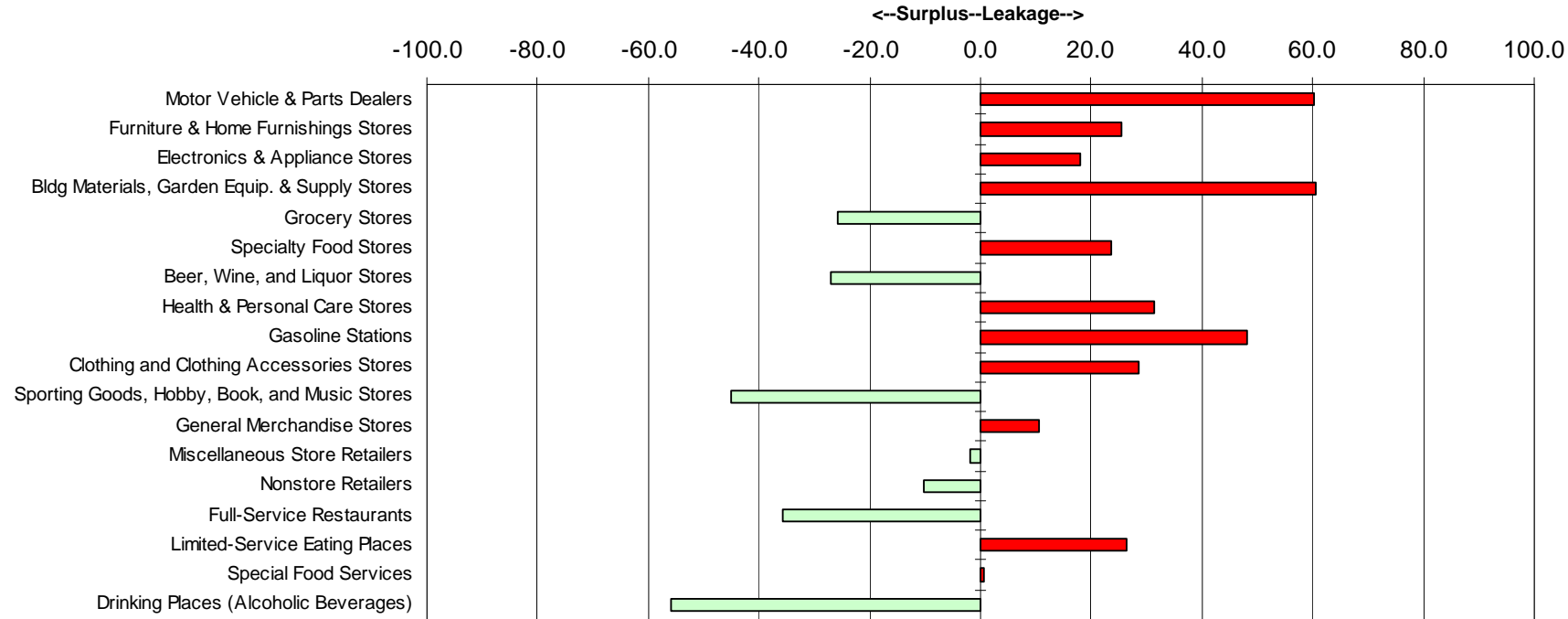
Belmont-Hawthorne-Division Analysis Area

Retail Market Profile

Retail Gap = \$52 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$432,445,295	\$380,631,552	\$51,813,743	6.4	485
Total Retail Trade (NAICS 44-45)	\$367,909,912	\$289,204,067	\$78,705,845	12.0	298
Total Food & Drink (NAICS 722)	\$64,535,383	\$91,427,485	-\$26,892,102	-17.2	187

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Belmont-Hawthorne-Division Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

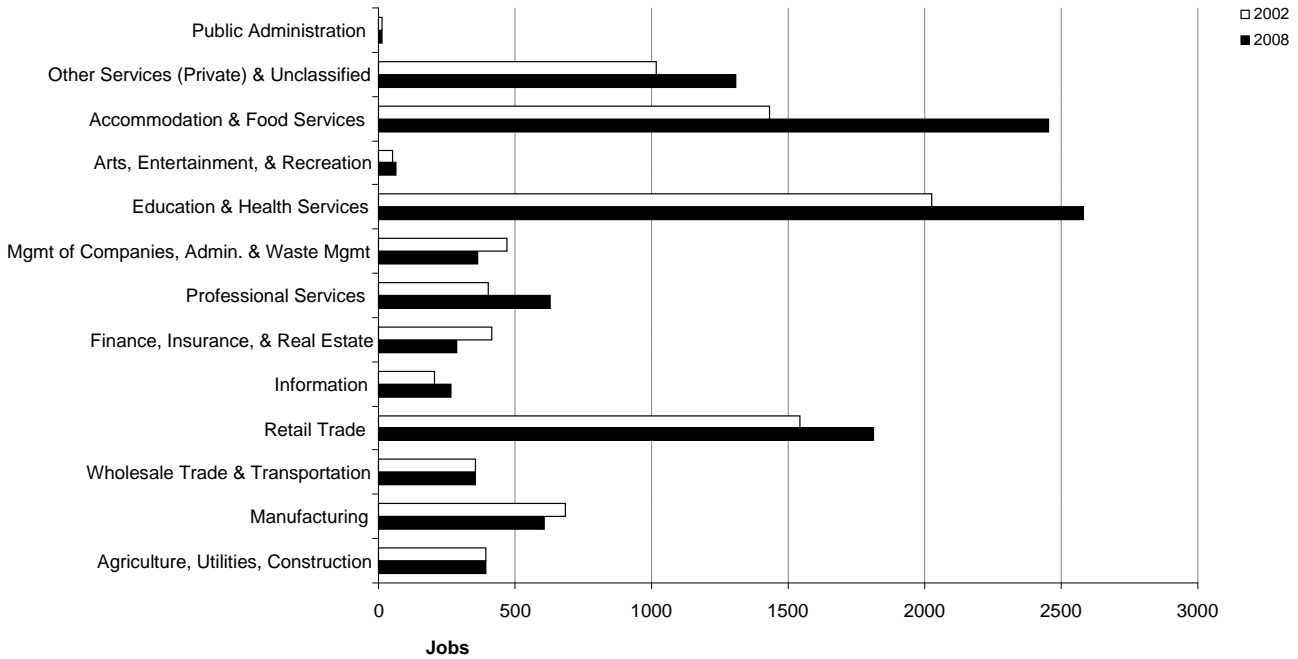
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

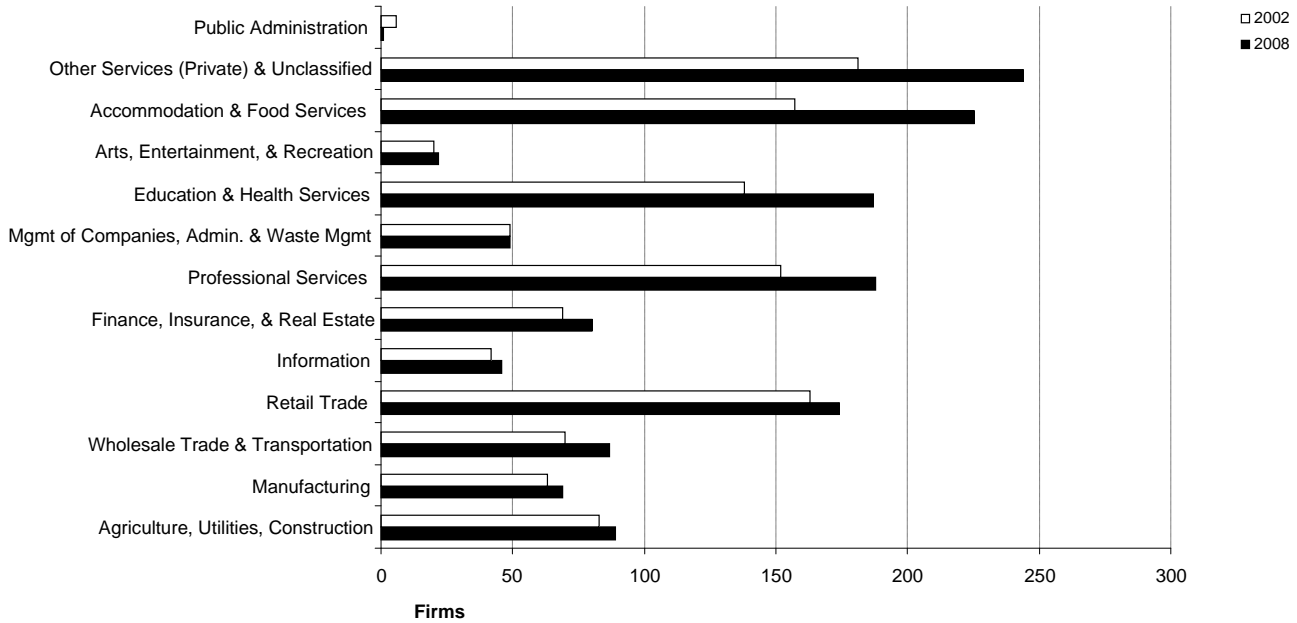
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	9,004	11,132	+2,128
Total Firms	1,193	1,461	+268
Average Annual Wages	\$24,773	\$28,551	+\$3,778

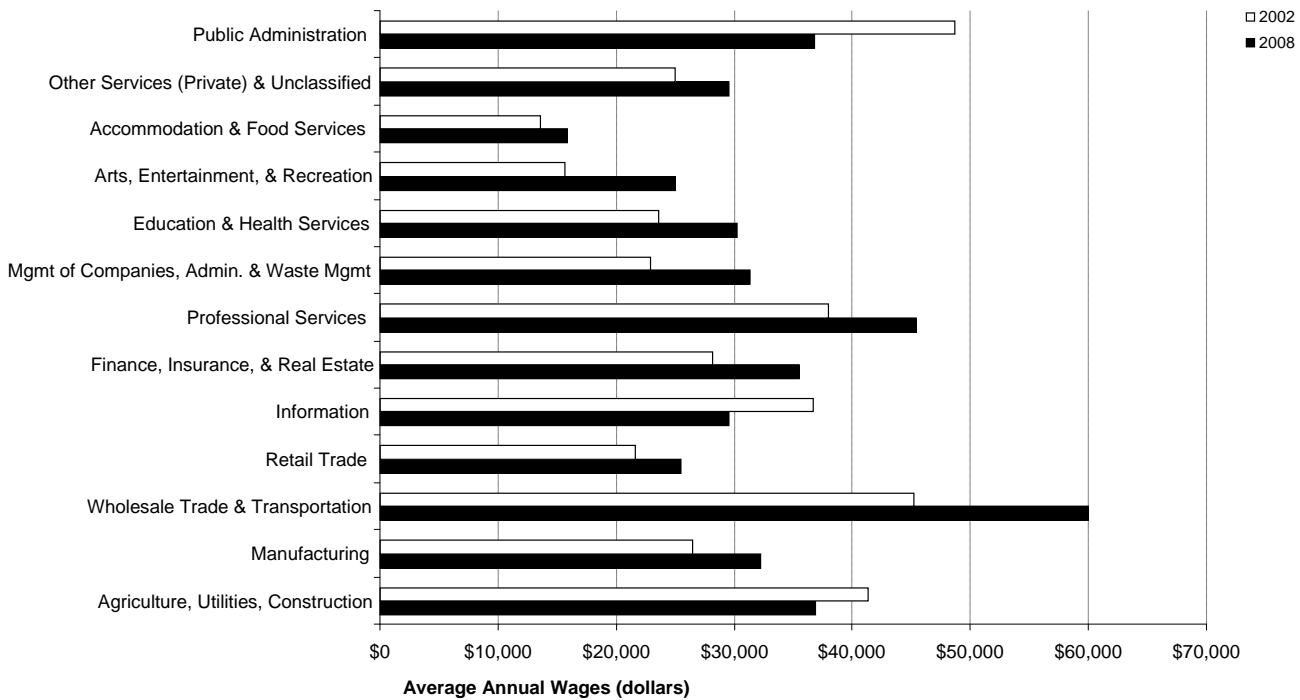
Total Jobs



Total Firms



Average Annual Wages

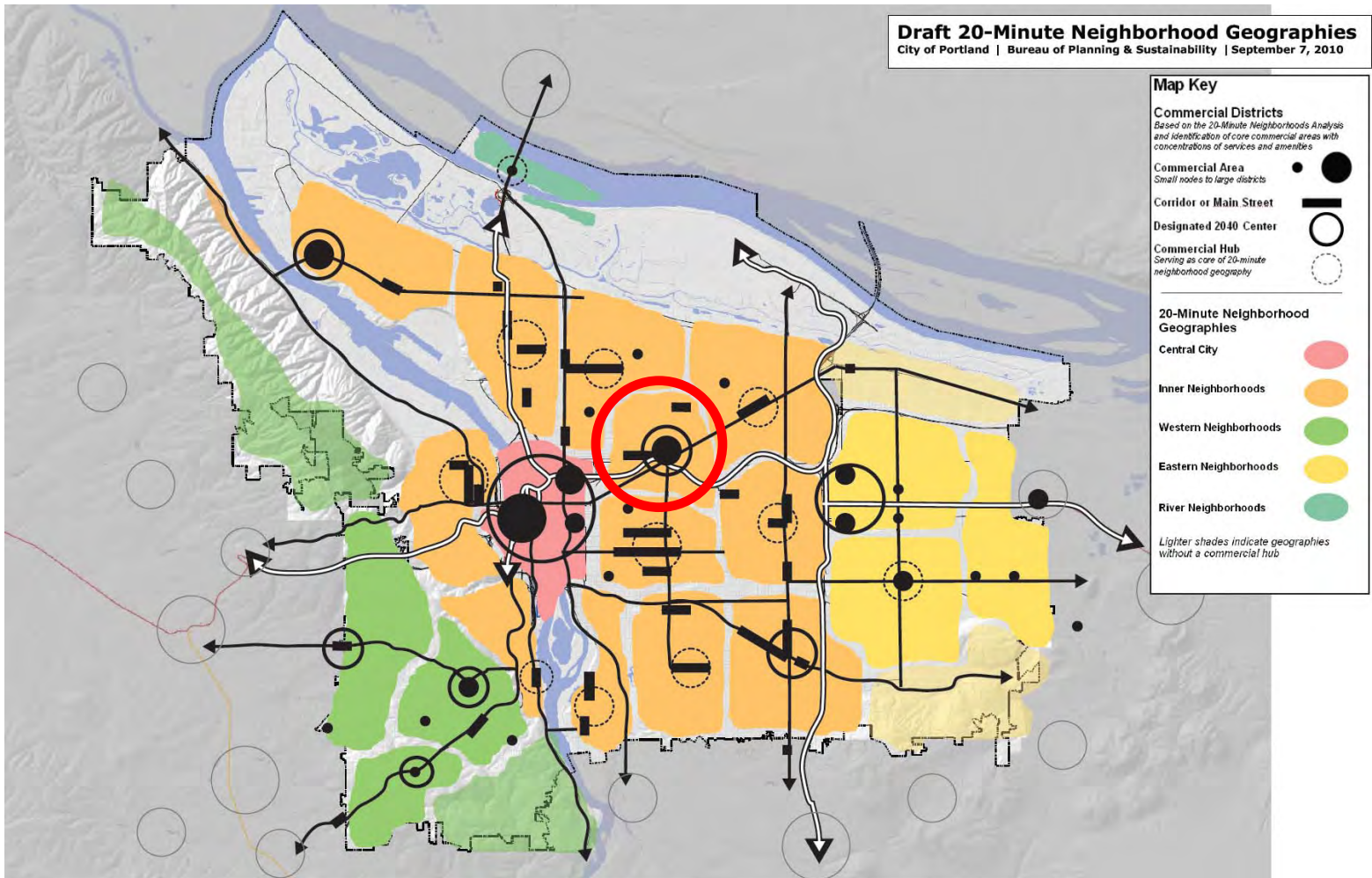


8

Hollywood Area

Including Hollywood, Grant Park, Sullivan's Gulch, and parts of the Irvington, Alameda, Beaumont-Wilshire, Rose City Park, North Tabor, Laurelhurst, and Kerns neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Hollywood Analysis Area

Services and Amenities

Population: 30,700 people (14,000 households)
Land Area: 3.9 square miles (8,000 people per sq. mile)

Commercial Districts

The area has a number of distinct commercial districts of varying sizes. The largest concentration of commercial services is in the Hollywood District. Other significant concentrations are located along NE Broadway (west of the Hollywood District) and in Beaumont Village along NE Fremont. Smaller clusters of commercial services exist around NE Glisan and 28th Avenue, at NE Glisan and 47th Avenue, and along NE Sandy Boulevard.

Grocery stores: 5

Community Amenities

Community Centers: None

Libraries: 1 (Hollywood Library)

Parks and Open Spaces: 40 acres - including Grant Park, Oregon Park, Frazer Park, and Buckman Field

Tree Canopy Coverage: 22%

Public Schools: 2 high schools (Grant and Benson),
4 K-8 schools (Alameda Elementary, Beaumont Middle School, Beverly Cleary K-8, Laurelhurst K-8)

Colleges (campus): None

Hospitals: 1 (Providence Portland Medical Center)

Farmers Markets: 1 (Hollywood Farmers Market)

Transit Centers/Stations: 1 (Hollywood Transit Center)

Walkable Access Score: 70 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

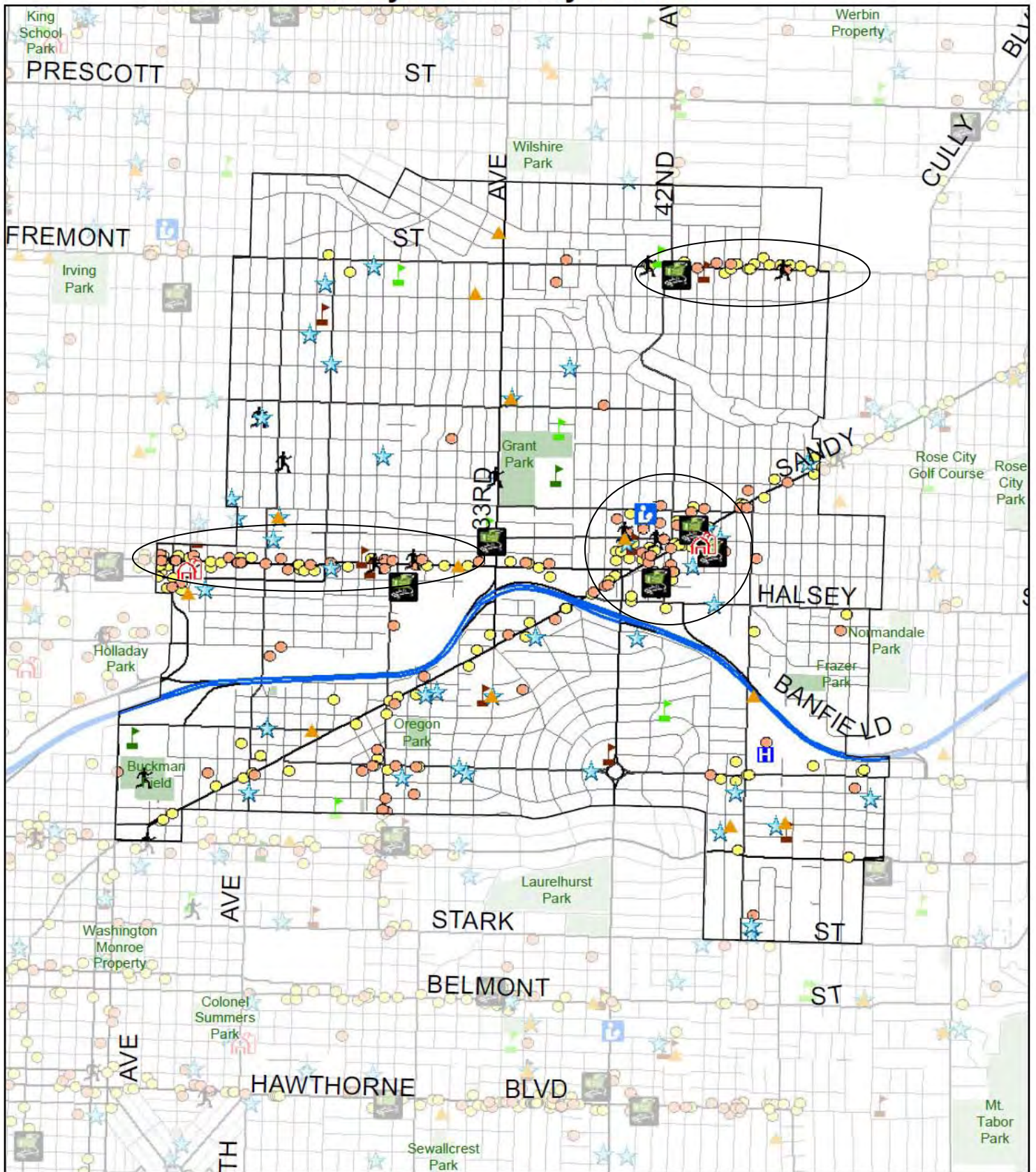
Percentage of households:	
Within 1/2 mile of a park:	87%
Within 1/2 mile of a public elementary school:	43%
Within 3 miles of a full-service community center:	87%
Within 1/2 mile of a full-service grocery store:	54%
Within 1/4 mile of a frequent service transit stop:	57%

Neighborhood and Business Associations

Neighborhood Associations: Hollywood, Grant Park, Sullivan's Gulch, Irvington, Alameda, Beaumont-Wilshire, Rose City Park, North Tabor, Laurelhurst, Kerns

Business Associations: Hollywood Boosters, Beaumont Business Association, Northeast Broadway Business Association, North-Northeast Business Association

Hollywood Analysis Area

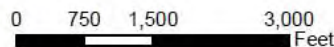


Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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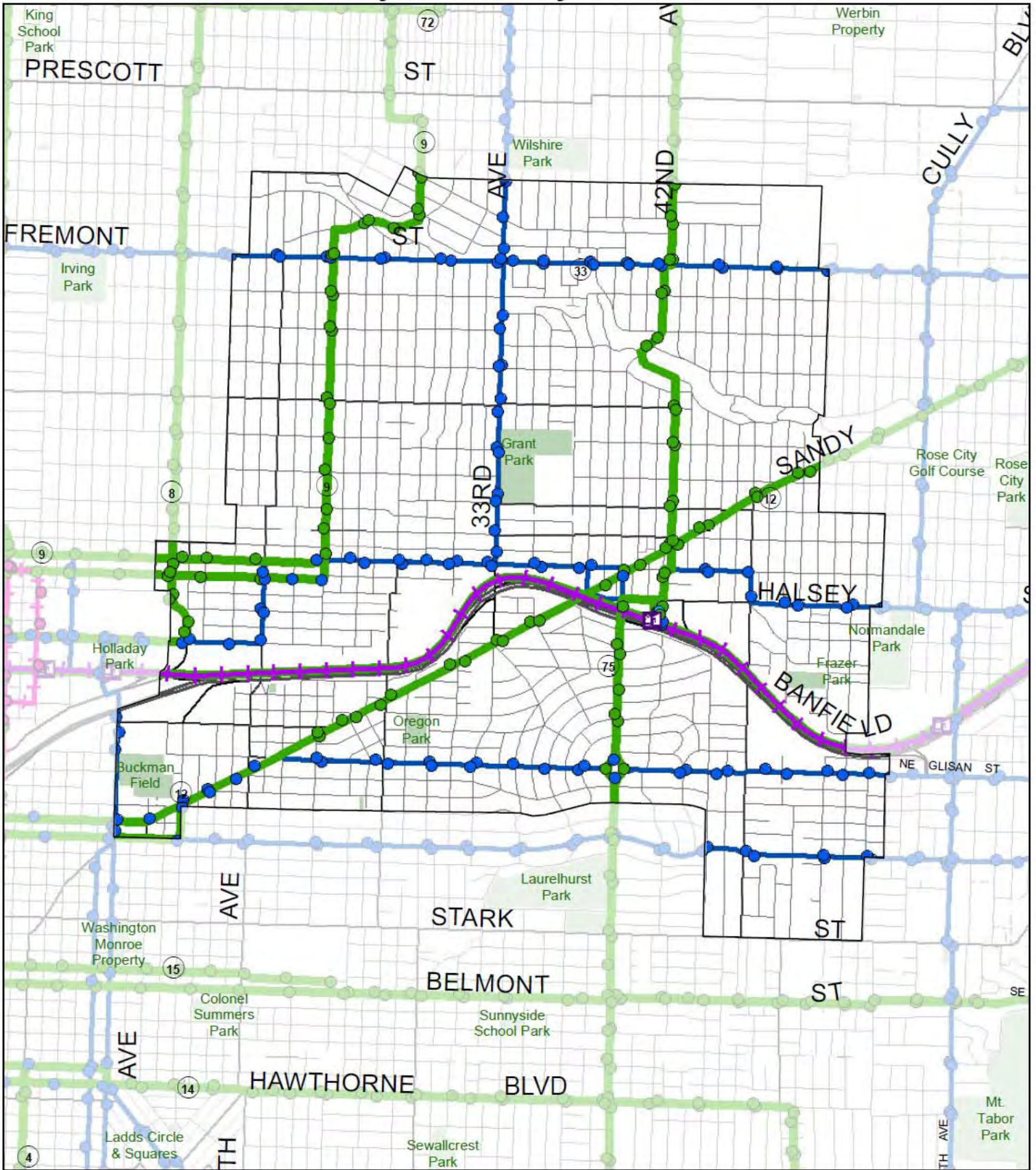


March 25, 2011

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commercial data from InfoUSA 2008

Hollywood Analysis Area



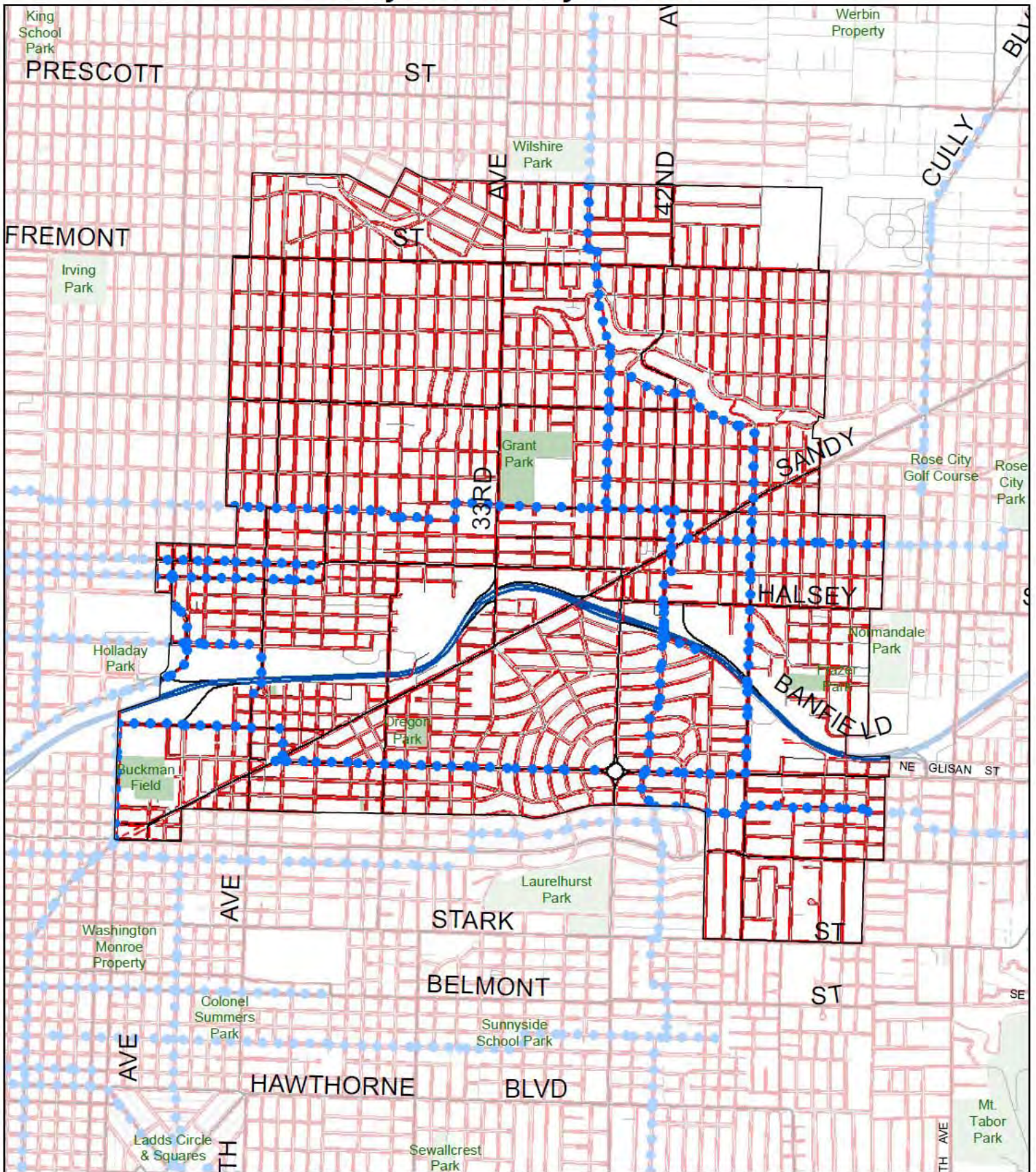
Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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Hollywood Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



City of Portland Bureau of Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director



March 25, 2011

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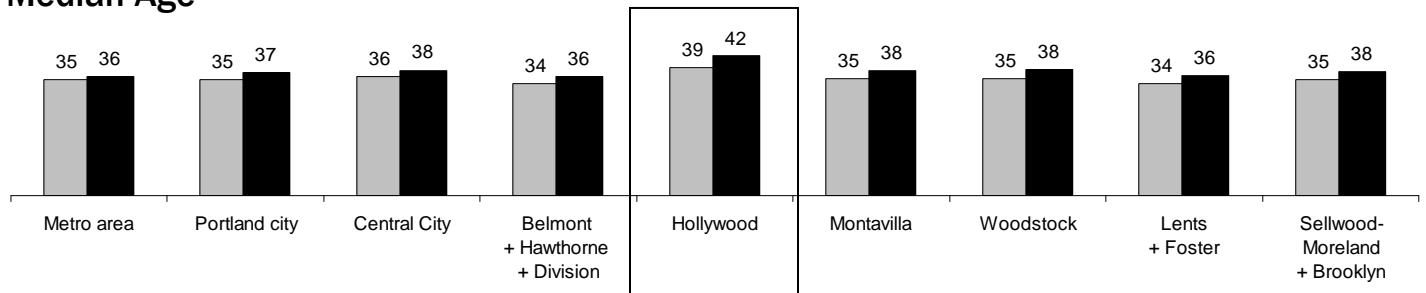
Hollywood Analysis Area Demographics (2000 – 2010)

Population

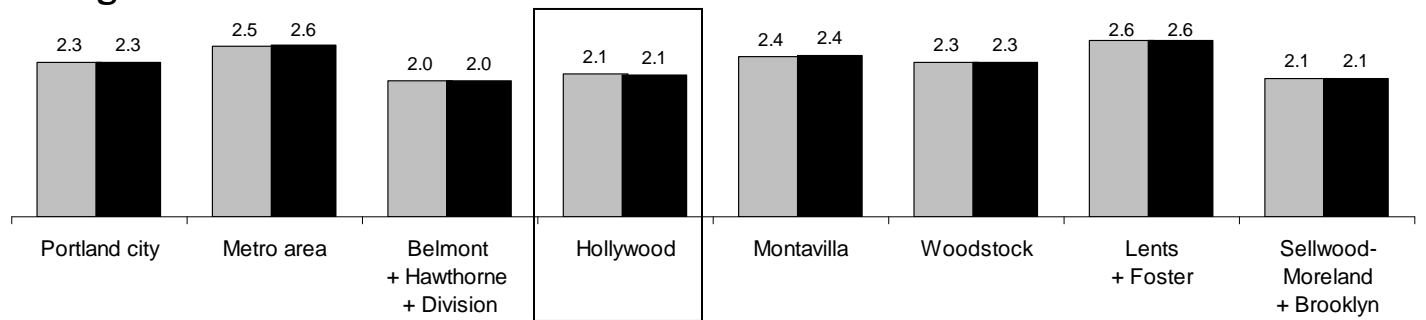
	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	2,226,000	589,000	30,931	36,907	30,699	31,581	31,266	43,891	15,349
2000	1,927,881	529,121	19,202	35,434	29,532	30,336	30,357	40,472	14,448
% change	12.9%	10.6%	61.1%	4.2%	4.0%	4.1%	3.0%	8.4%	6.2%

■ 2000 ■ 2010

Median Age

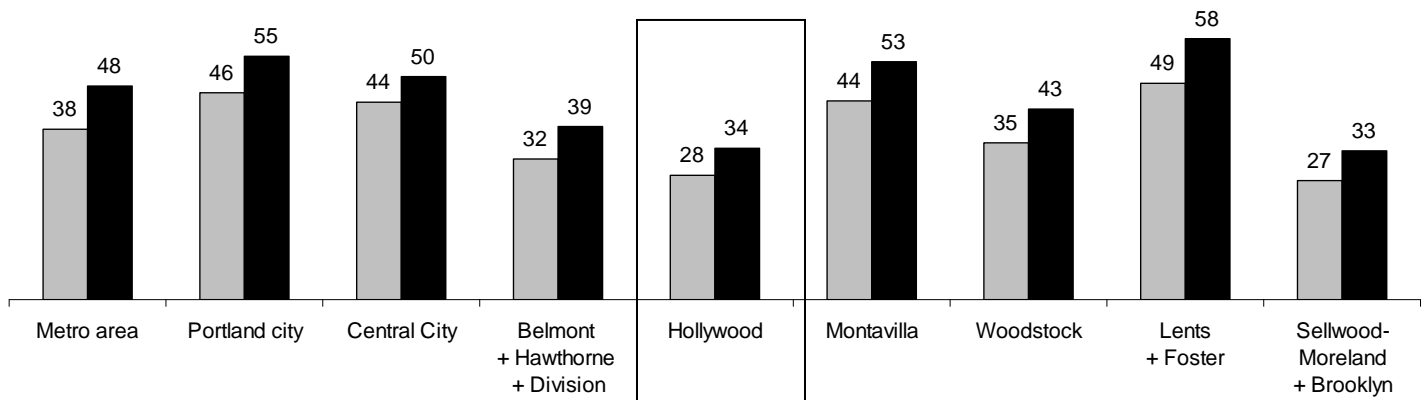


Average Household Size

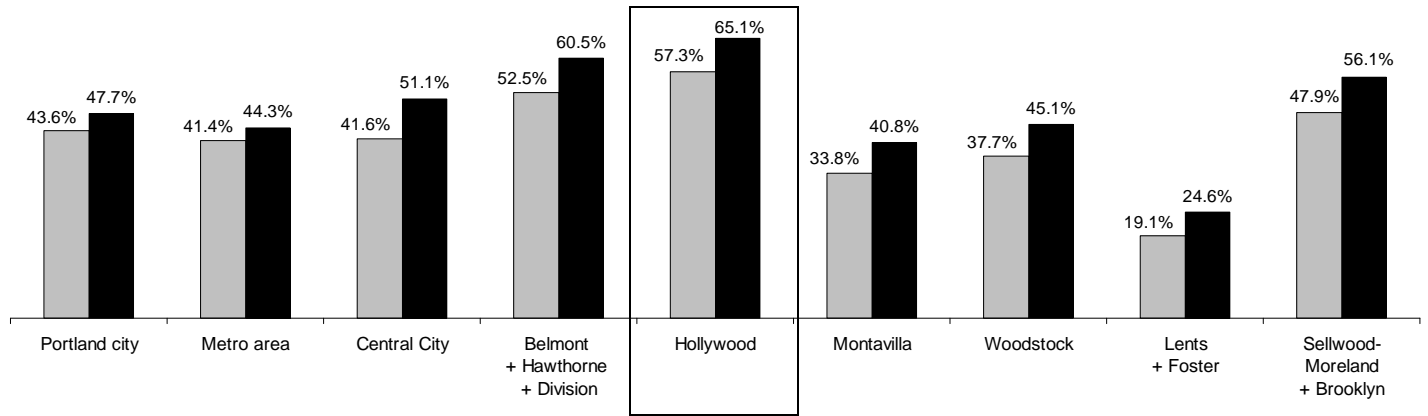


Diversity Index

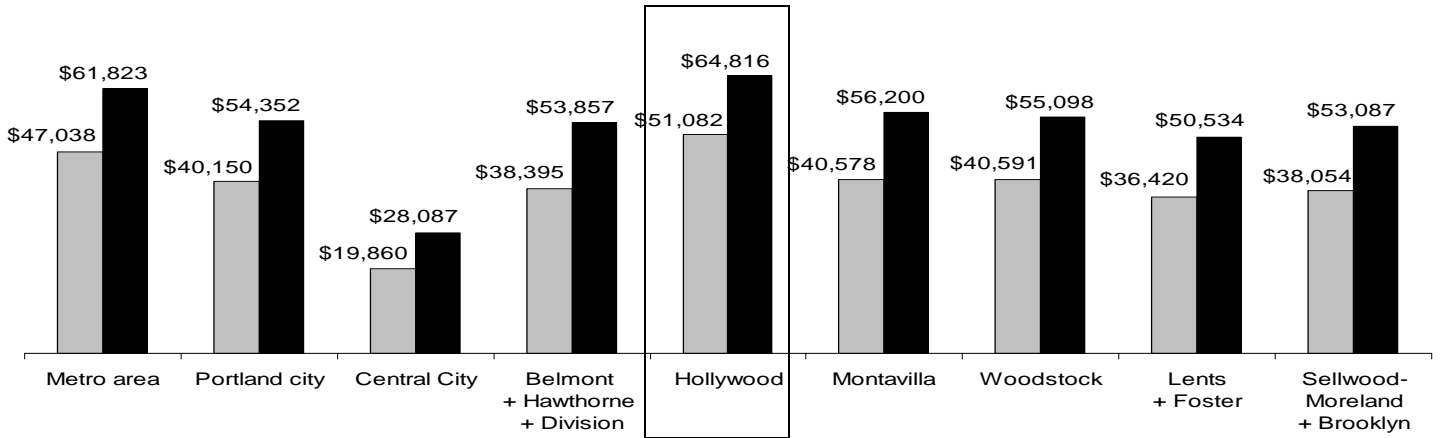
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



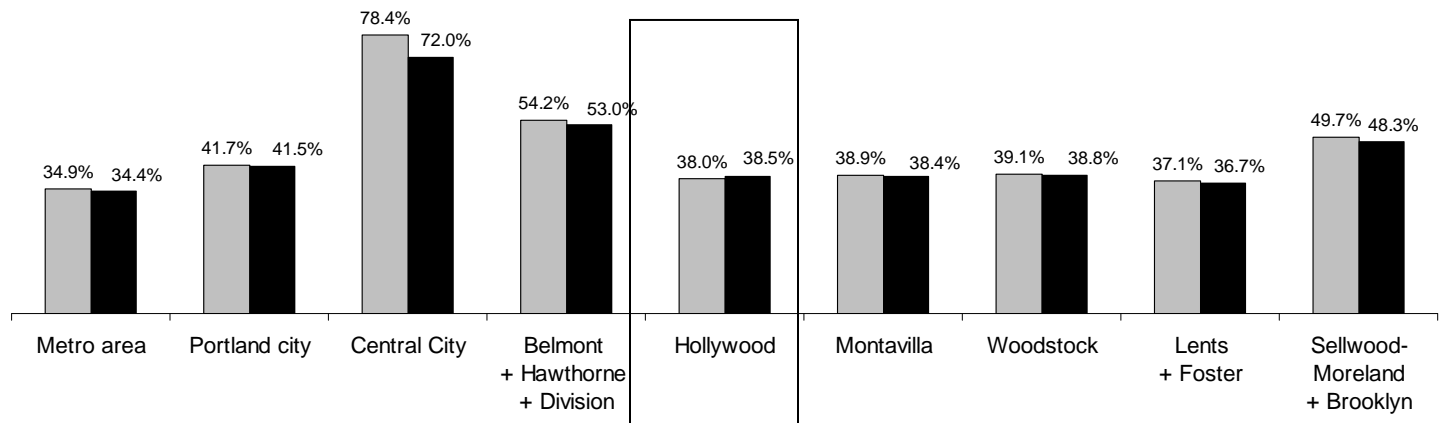
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	273,500	253,184	400,314	302,669	\$368,711	\$226,609	\$247,365	\$191,470	\$284,198
2000	168,347	154,721	250,566	181,054	\$223,268	\$141,422	\$152,397	\$120,837	\$170,779
% change	62.5%	63.6%	59.8%	67.2%	65.1%	60.2%	62.3%	58.5%	66.4%

Percent of Renters of Occupied Housing Units



Hollywood Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

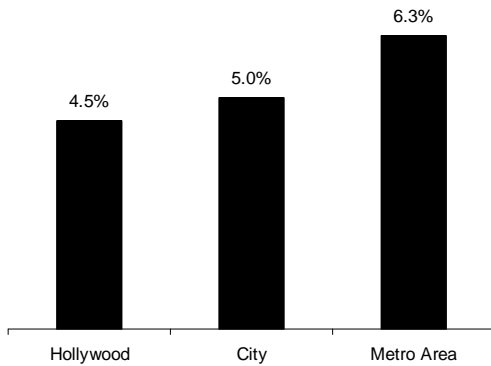
Hollywood	City	Metro Area
3,448,216	51,937,895	107,875,146

OFFICE SPACE

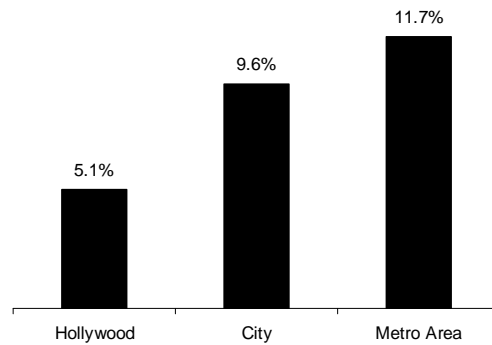
Square Feet

Hollywood	City	Metro Area
2,375,801	54,348,765	92,465,455

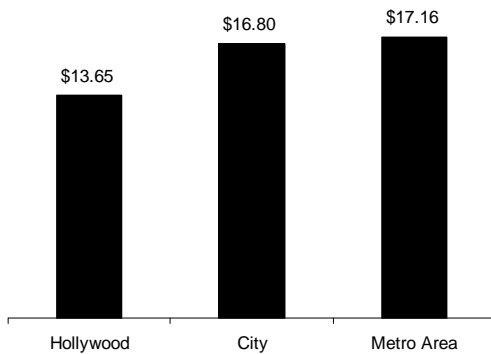
Retail Vacancy



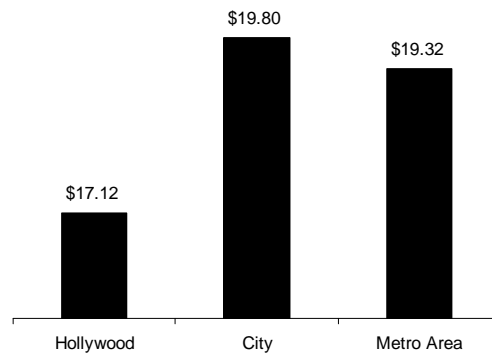
Office Vacancy



Retail Rents



Office Rents



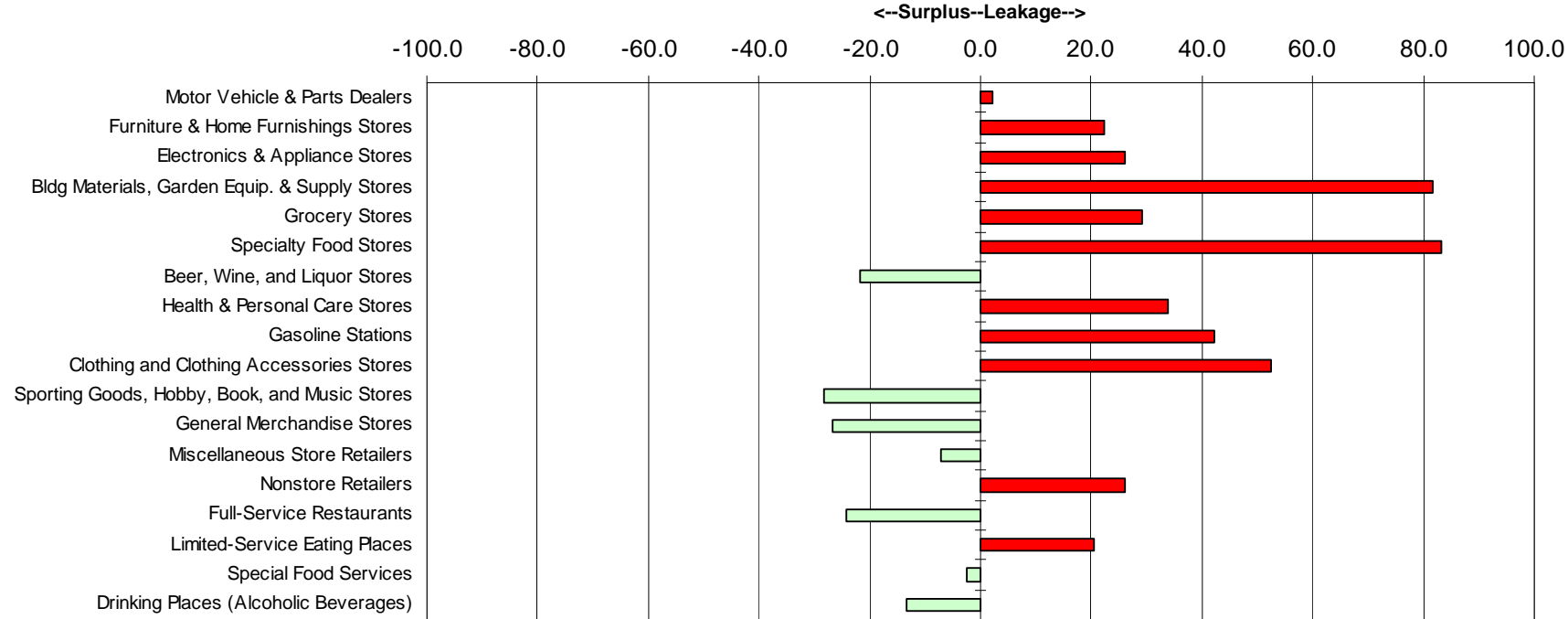
Hollywood Analysis Area

Retail Market Profile

Retail Gap = \$65 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$443,400,912	\$378,127,863	\$65,273,049	7.9	365
Total Retail Trade (NAICS 44-45)	\$377,856,611	\$307,163,731	\$70,692,880	10.3	241
Total Food & Drink (NAICS 722)	\$65,544,301	\$70,964,132	-\$5,419,831	-4.0	124

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Hollywood Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

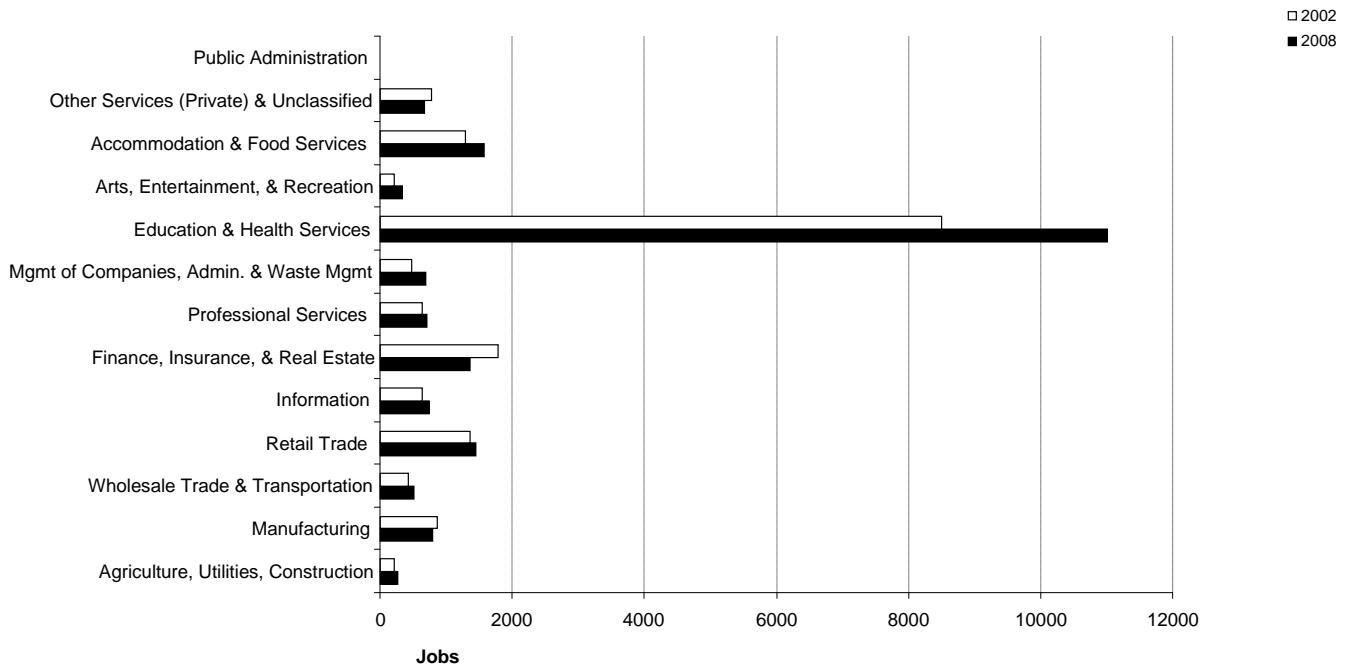
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

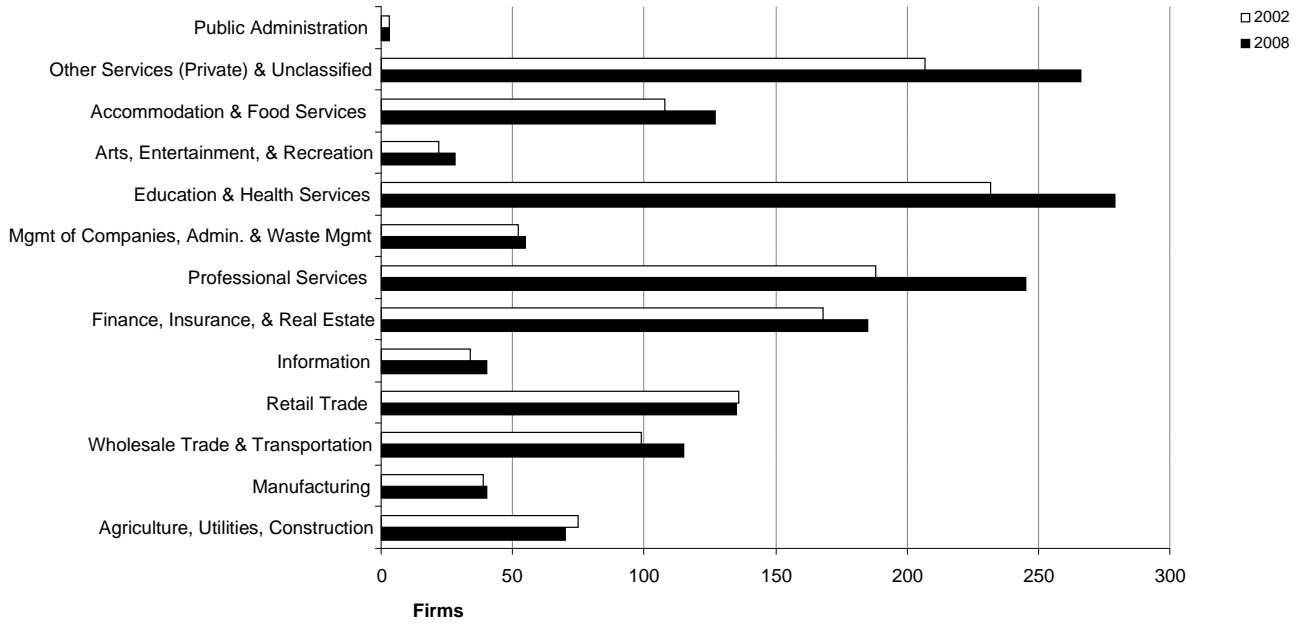
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	17,167	20,132	+2,965
Total Firms	1,363	1,588	+225
Average Annual Wages	\$33,527	\$44,193	+\$10,666

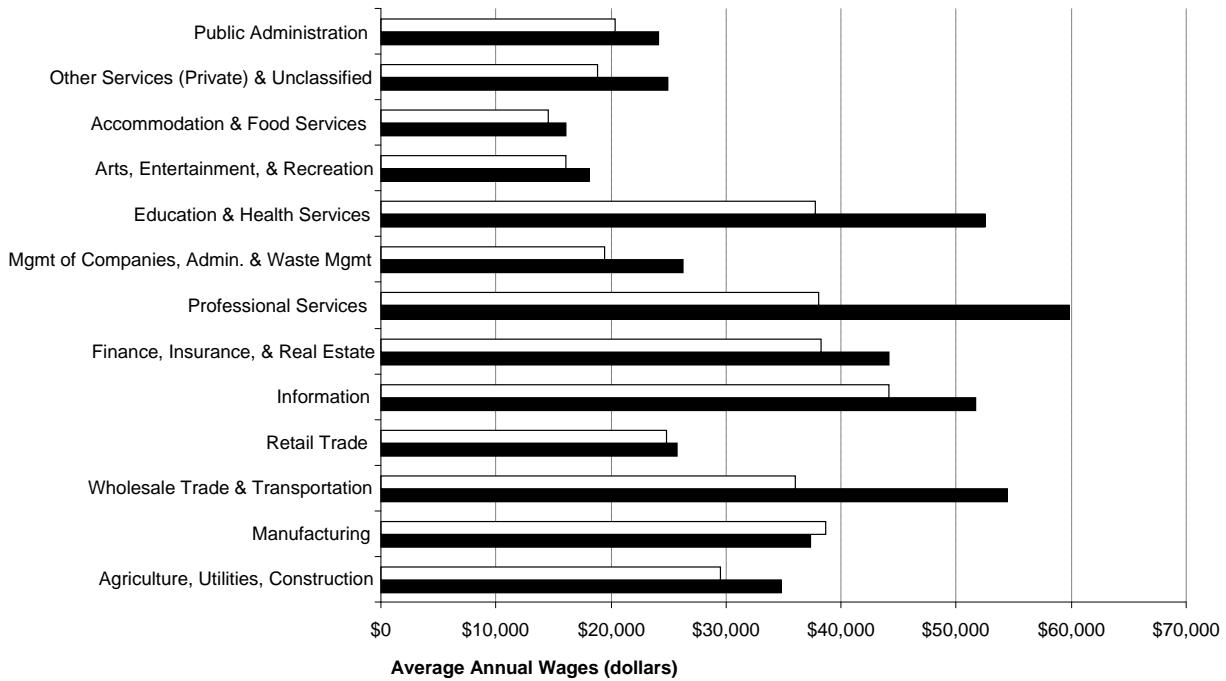
Total Jobs



Total Firms



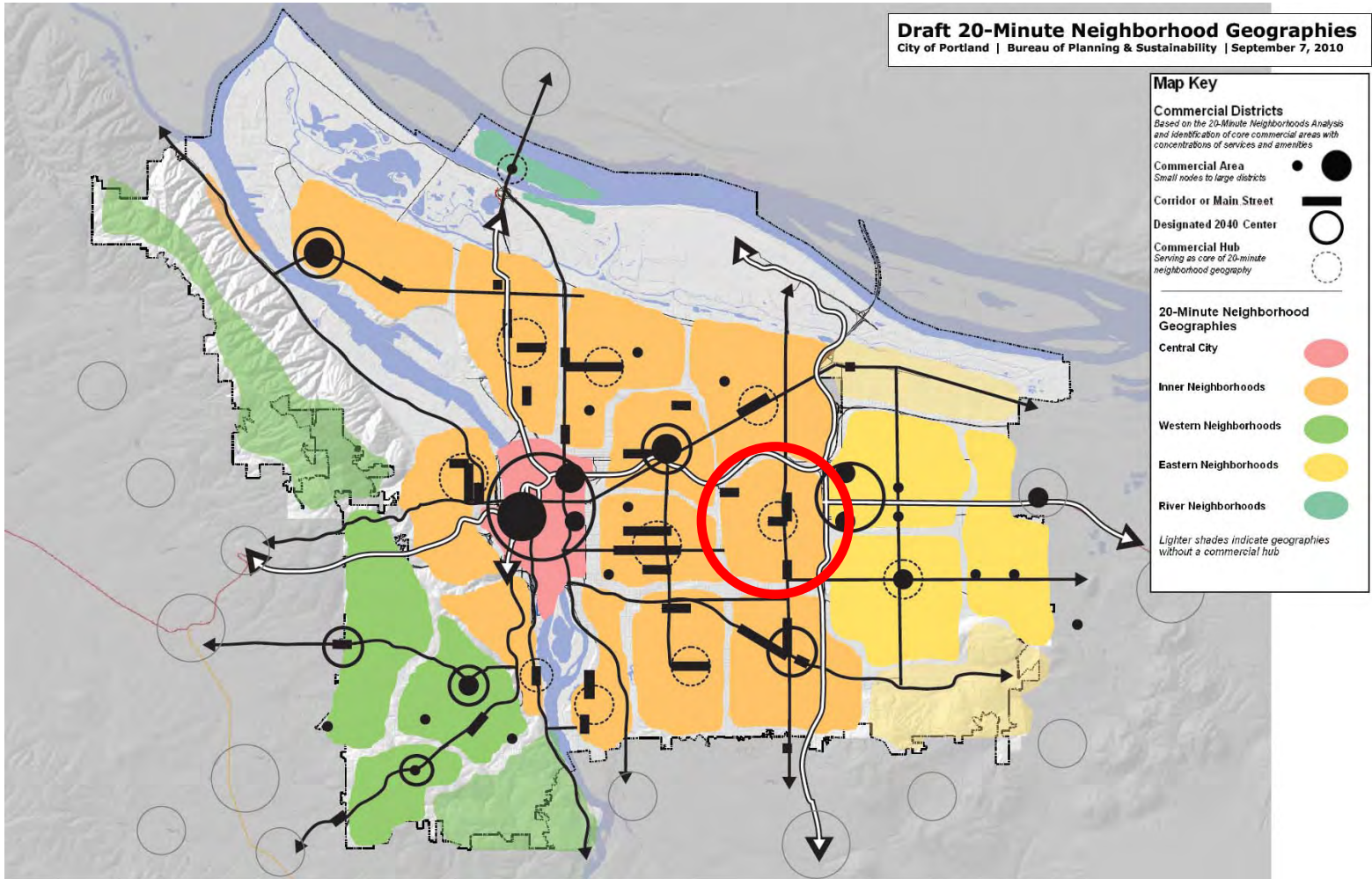
Average Annual Wages



Montavilla Analysis Area

Including Montavilla, Mt. Tabor, and parts of the North Tabor, South Tabor, and Powellhurst-Gilbert neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Montavilla Analysis Area

Services and Amenities

Population: 31,600 people (13,300 households)
Land Area: 4.4 square miles (7,200 people per sq. mile)

Commercial Districts

Primary concentrations of commercial districts include Montavilla's historic main street along Stark near 82nd Avenue, Glisan west of 82nd Avenue, and the area around Division and 82nd Avenue (which includes the Fubbon shopping center and numerous Asian businesses and is sometimes referred to as the "New Chinatown"). Smaller concentrations of neighborhood commercial services are also located elsewhere along 82nd Avenue.

Grocery stores: 4

Community Amenities

Community Centers: 1 (Montavilla Community Center and Pool)

Libraries: None

Parks and Open Spaces: 229 acres - including Mt. Tabor, Montavilla, Berrydale, and Harrison parks.

Tree Canopy Coverage: 22%

Public Schools: 1 high school (Franklin – at southwest edge of analysis area)
 5 K-8 schools (Atkinson Elementary*, Creative Science School K-8, Vestal K-8, Glencoe Elementary*, Harrison Park K-8)
 *At edge of analysis area

Colleges (campus): 3 (Portland Community College – Southeast Campus, Warner Pacific University, Multnomah University – Bible College and Biblical Seminary)

Hospitals: None

Farmers Markets: 1 (Montavilla Farmers Market)

Transit Centers/Stations: 4 (60th Avenue, 82nd Avenue, SE Main, and SE Division light rail stations – all located at edges of analysis area)

Walkable Access Score: 63 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

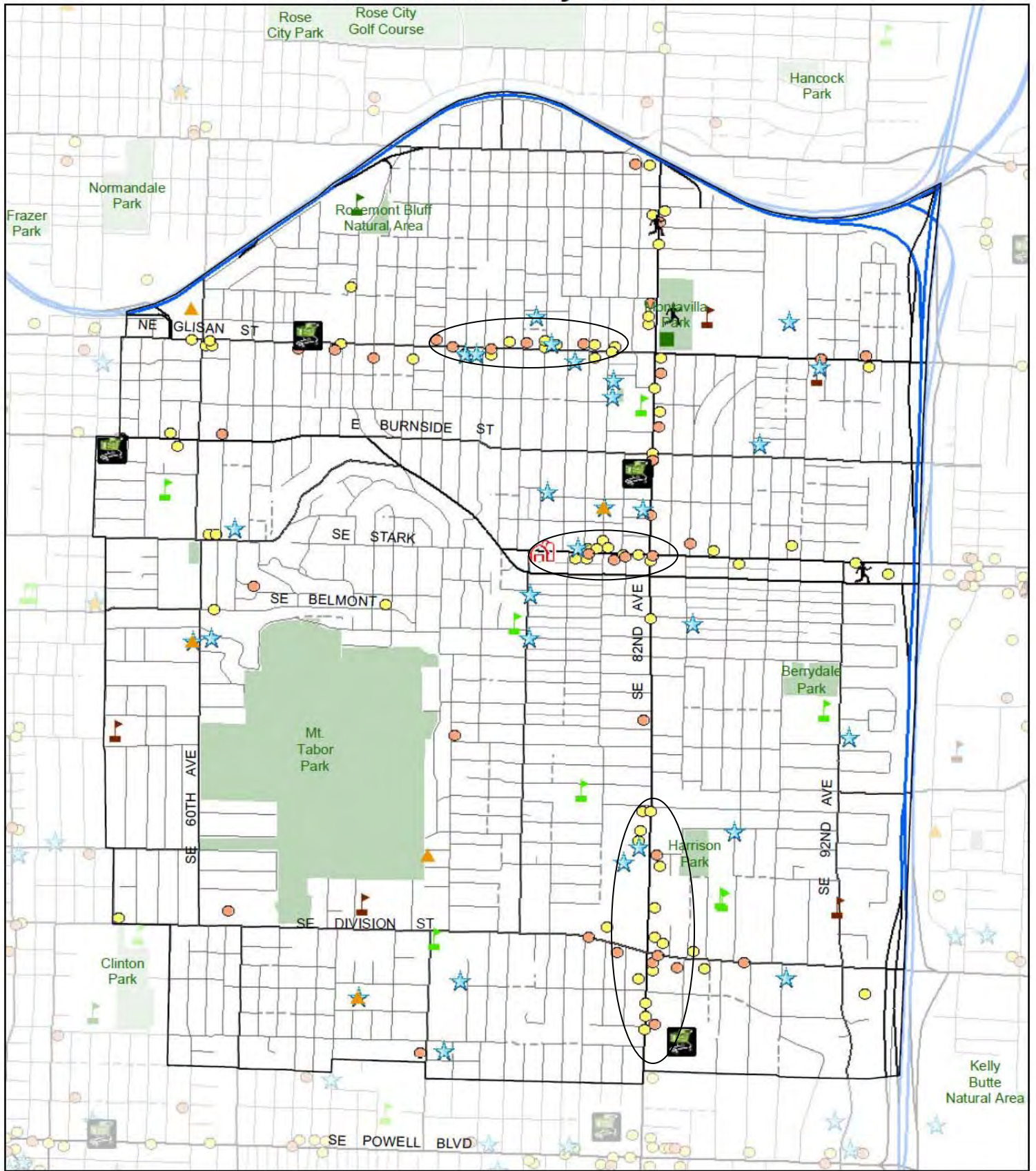
Within 1/2 mile of a park:	82%
Within 1/2 mile of a public elementary school:	41%
Within 3 miles of a full-service community center:	100%
Within 1/2 mile of a full-service grocery store:	34%
Within 1/4 mile of a frequent service transit stop:	46%

Neighborhood and Business Associations

Neighborhood Associations: Montavilla, Mt. Tabor, and parts of North Tabor, South Tabor, and Powellhurst-Gilbert

Business Associations: Montavilla/East Tabor and 82nd Avenue business associations

Montavilla Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



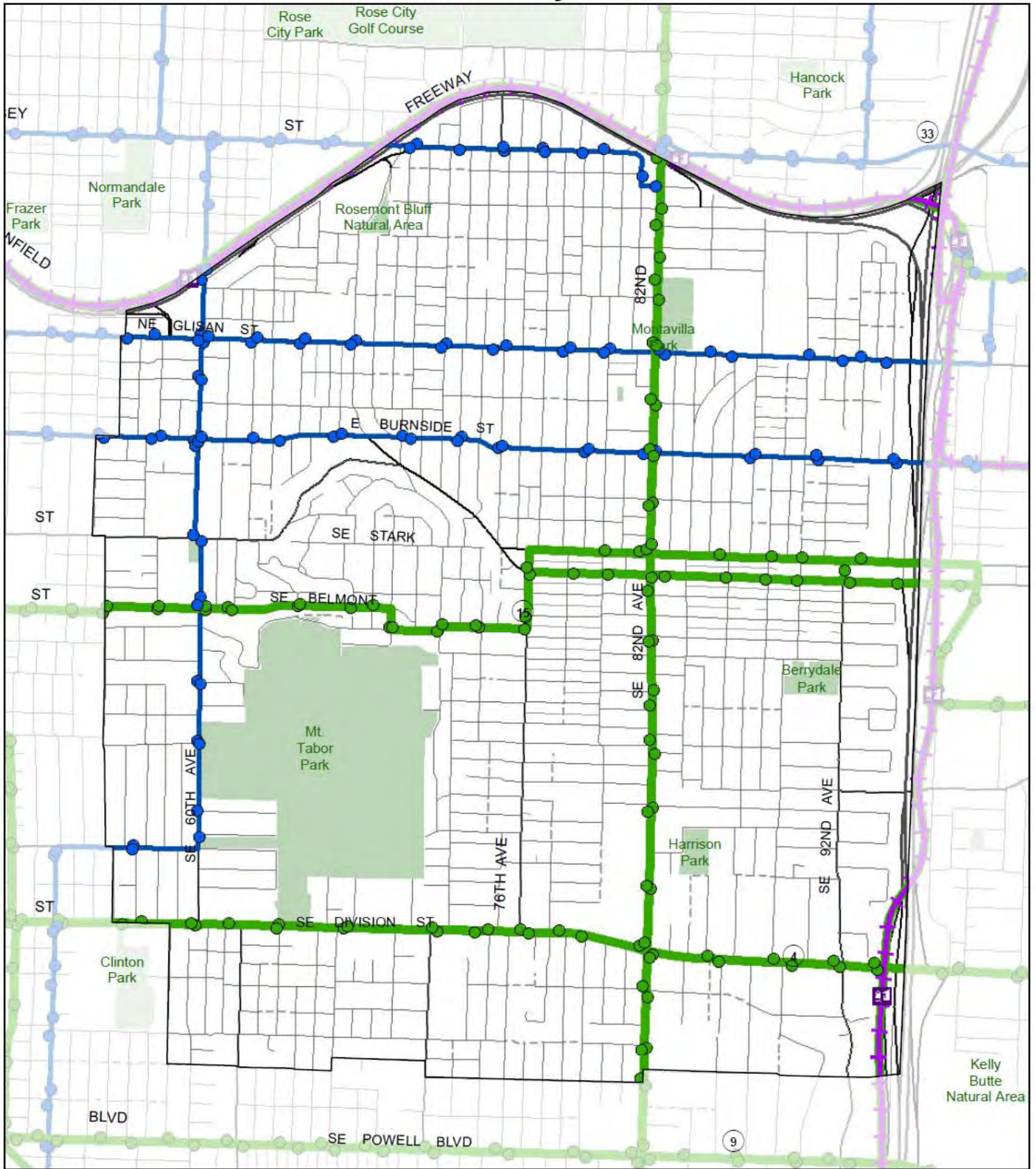
City of Portland Bureau of
Planning & Sustainability
 Sam Adams, Mayor | Susan Anderson, Director



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commercial data from InfoUSA 2008

Montavilla Analysis Area



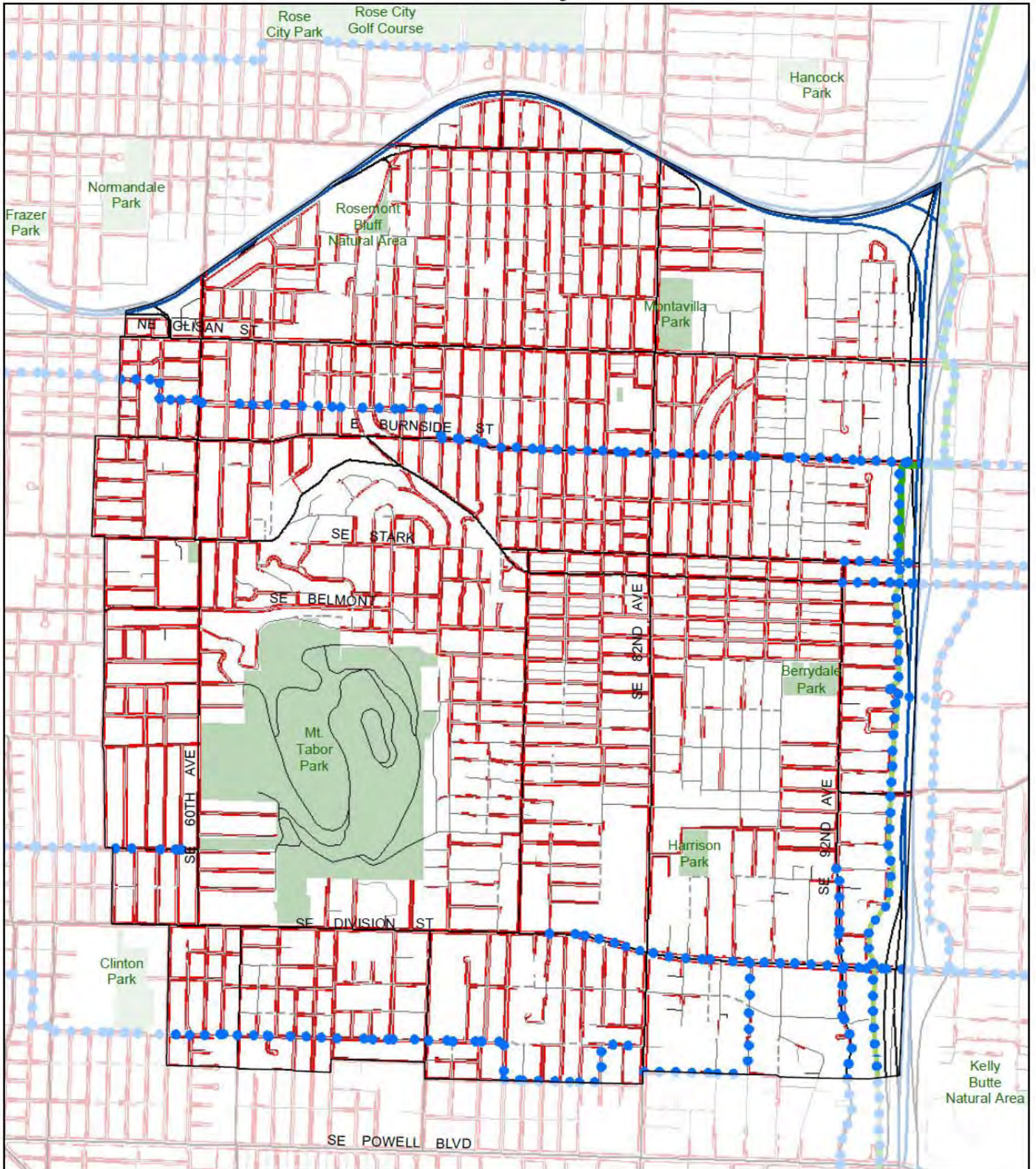
Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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Montavilla Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



City of Portland Bureau of Planning & Sustainability
 SAM ADAMS, Mayor | SUSAN ANDERSON, Director



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March 25, 2011

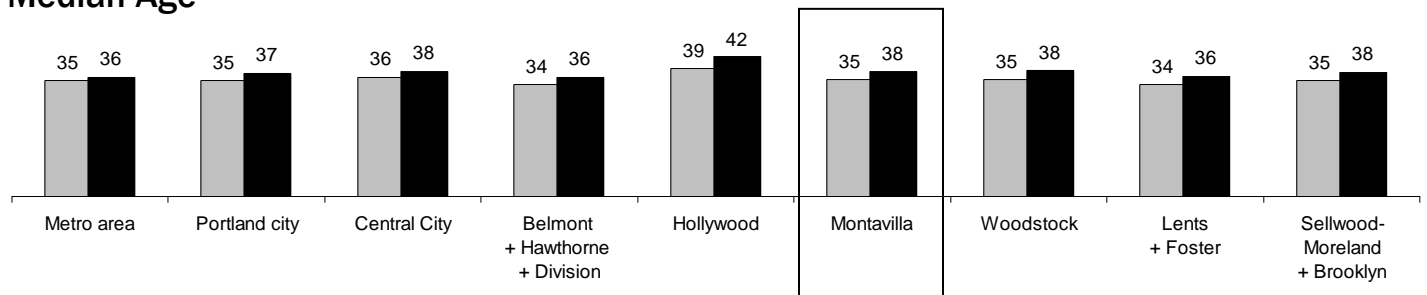
Montavilla Analysis Area Demographics (2000 – 2010)

Population

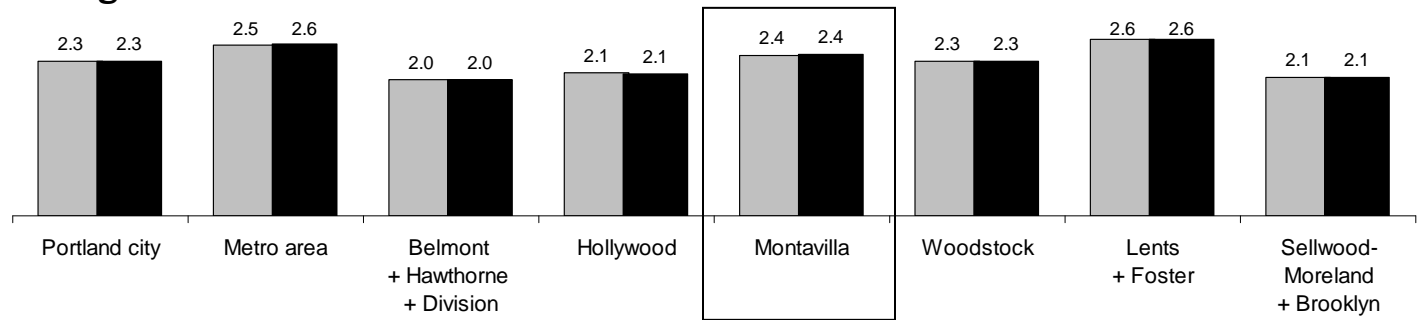
	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	2,226,000	589,000	30,931	36,907	30,699	31,581	31,266	43,891	15,349
2000	1,927,881	529,121	19,202	35,434	29,532	30,336	30,357	40,472	14,448
% change	12.9%	10.6%	61.1%	4.2%	4.0%	4.1%	3.0%	8.4%	6.2%

■ 2000 ■ 2010

Median Age

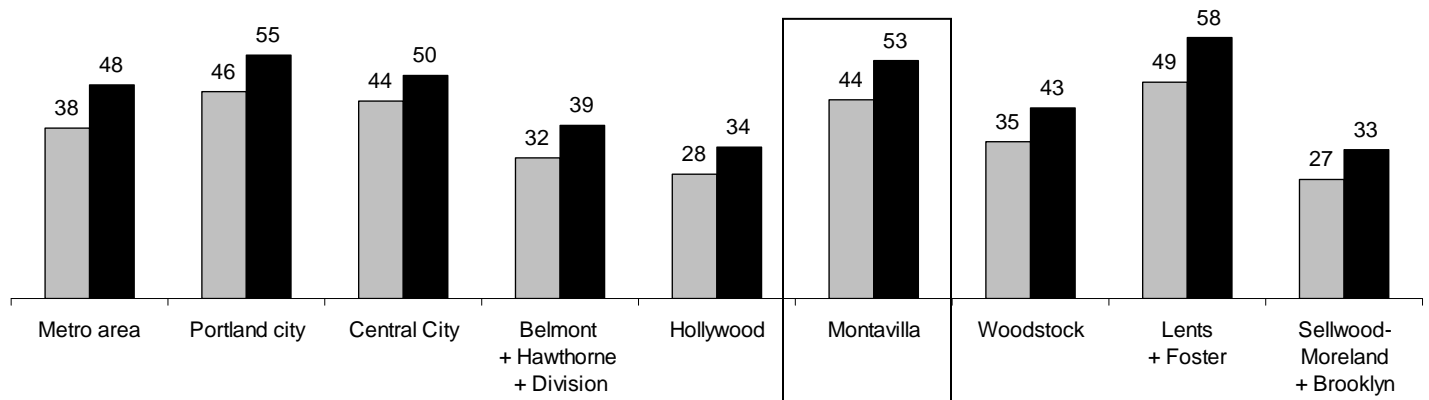


Average Household Size

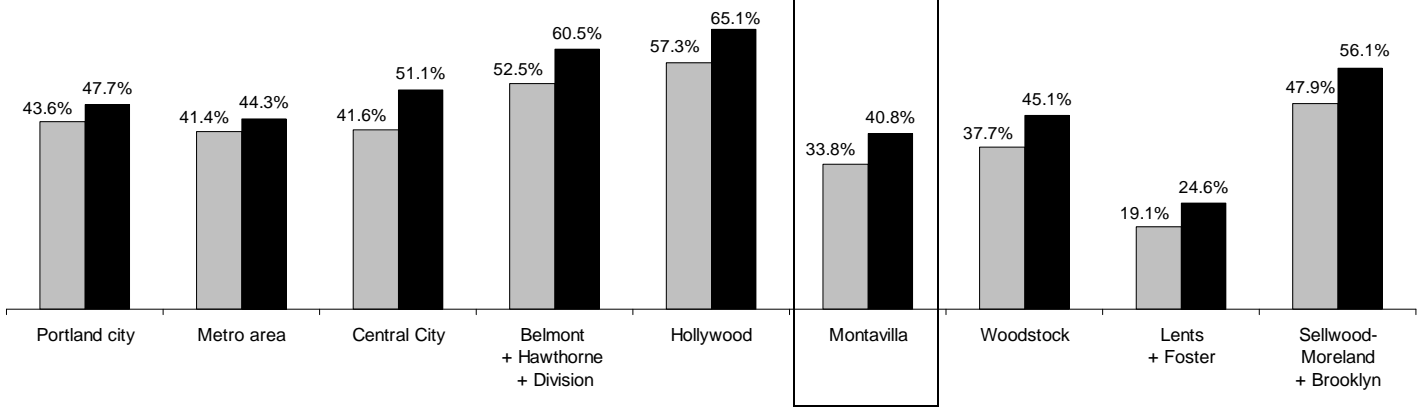


Diversity Index

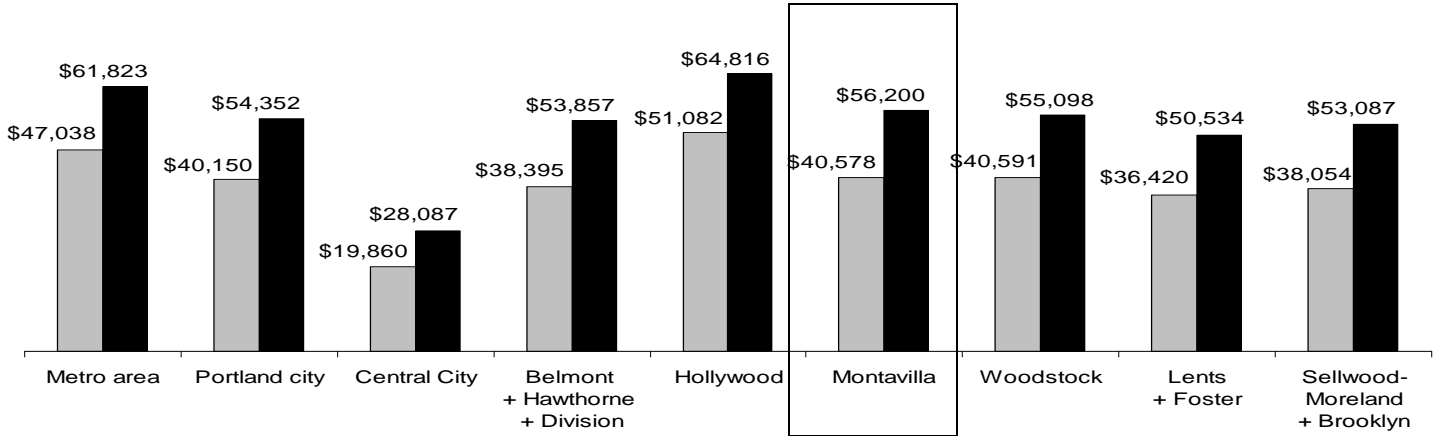
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



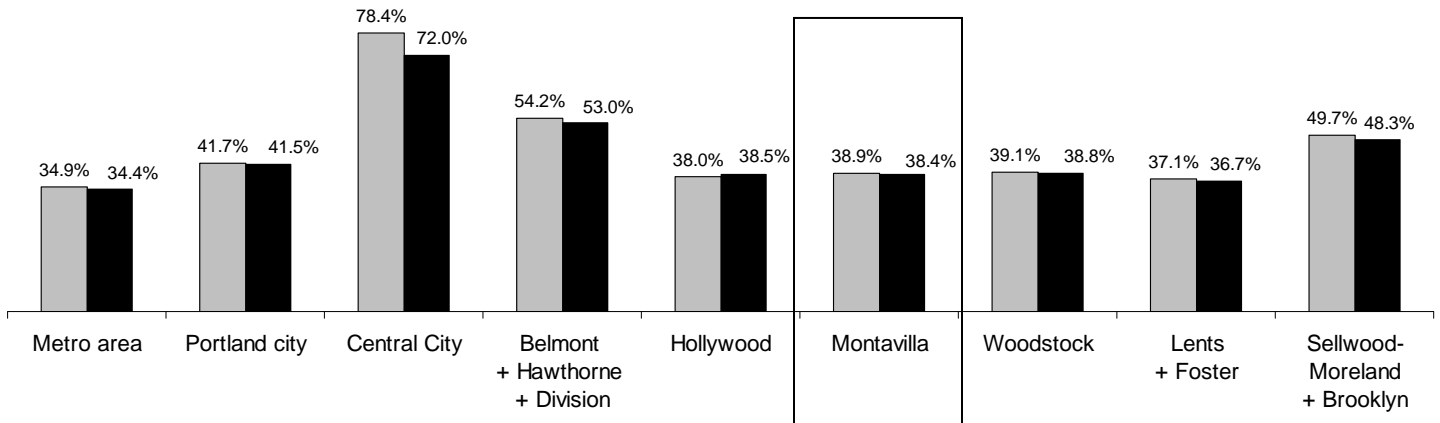
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	273,500	253,184	400,314	302,669	\$368,711	\$226,609	\$247,365	\$191,470	\$284,198
2000	168,347	154,721	250,566	181,054	\$223,268	\$141,422	\$152,397	\$120,837	\$170,779
% change	62.5%	63.6%	59.8%	67.2%	65.1%	60.2%	62.3%	58.5%	66.4%

Percent of Renters of Occupied Housing Units



Montavilla Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

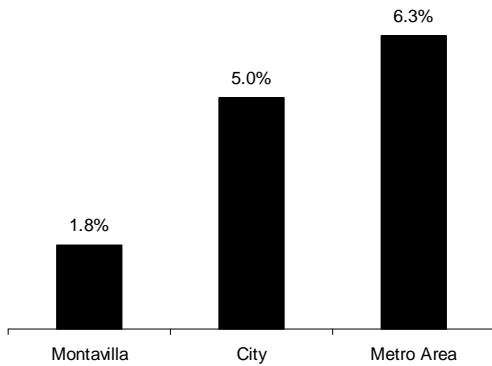
Montavilla	City	Metro Area
3,448,216	51,937,895	107,875,146

OFFICE SPACE

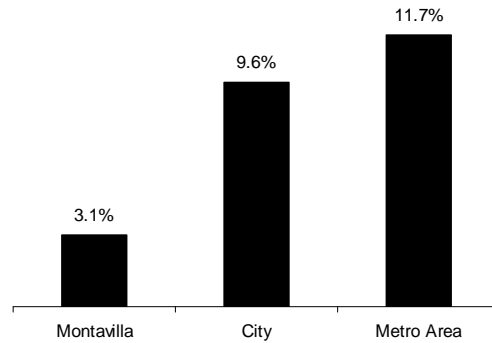
Square Feet

Montavilla	City	Metro Area
2,375,801	54,348,765	92,465,455

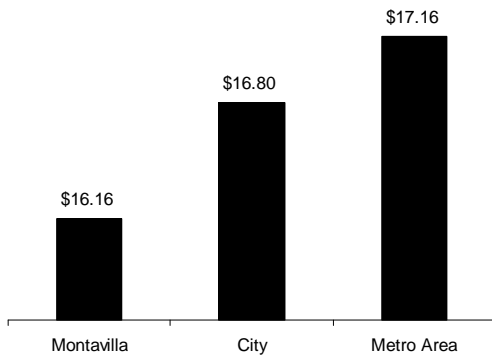
Retail Vacancy



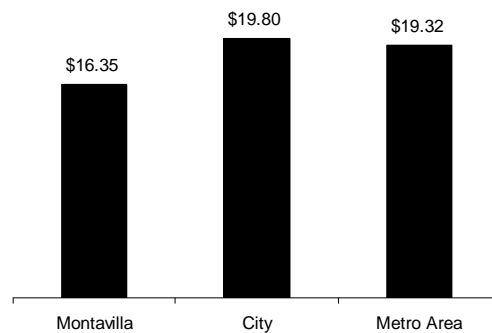
Office Vacancy



Retail Rents



Office Rents



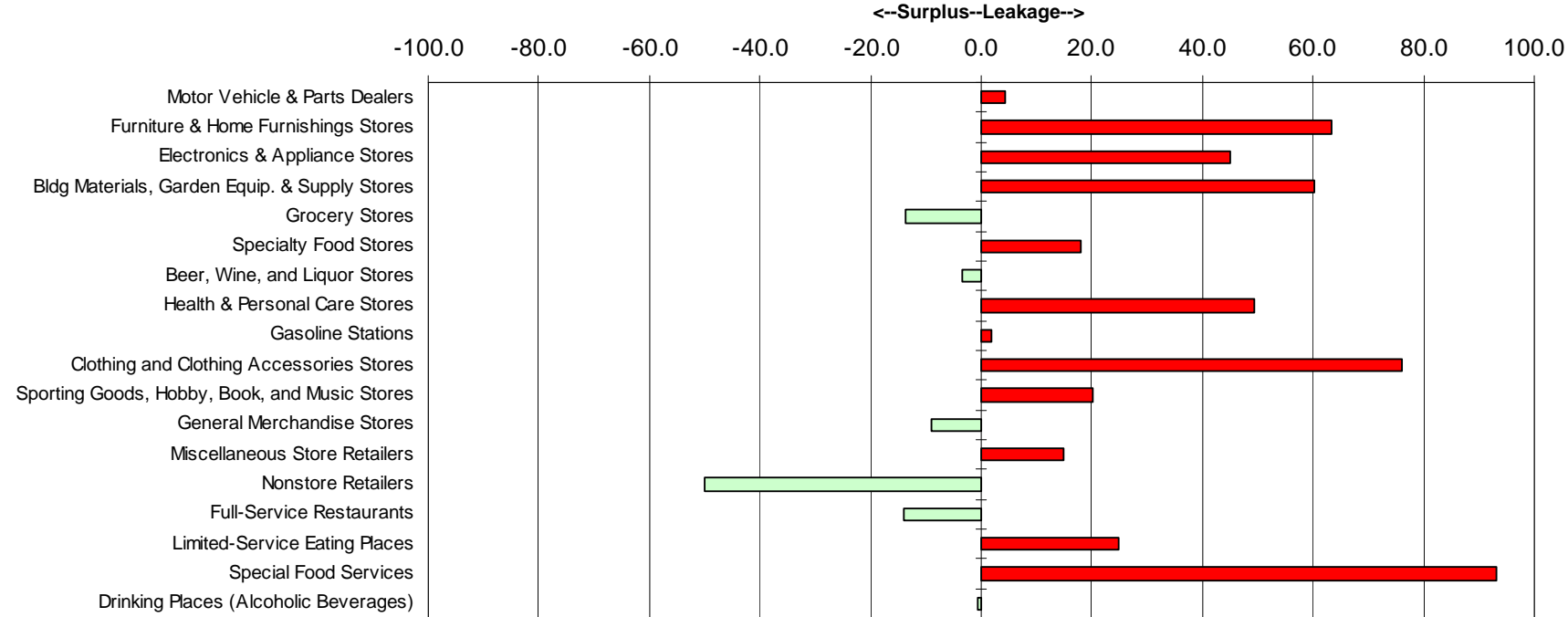
Montavilla Analysis Area

Retail Market Profile

Retail Gap = \$15 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$307,027,091	\$291,870,690	\$15,156,401	2.5	255
Total Retail Trade (NAICS 44-45)	\$261,905,097	\$255,650,875	\$6,254,222	1.2	174
Total Food & Drink (NAICS 722)	\$45,121,994	\$36,219,815	\$8,902,179	10.9	81

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Montavilla Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

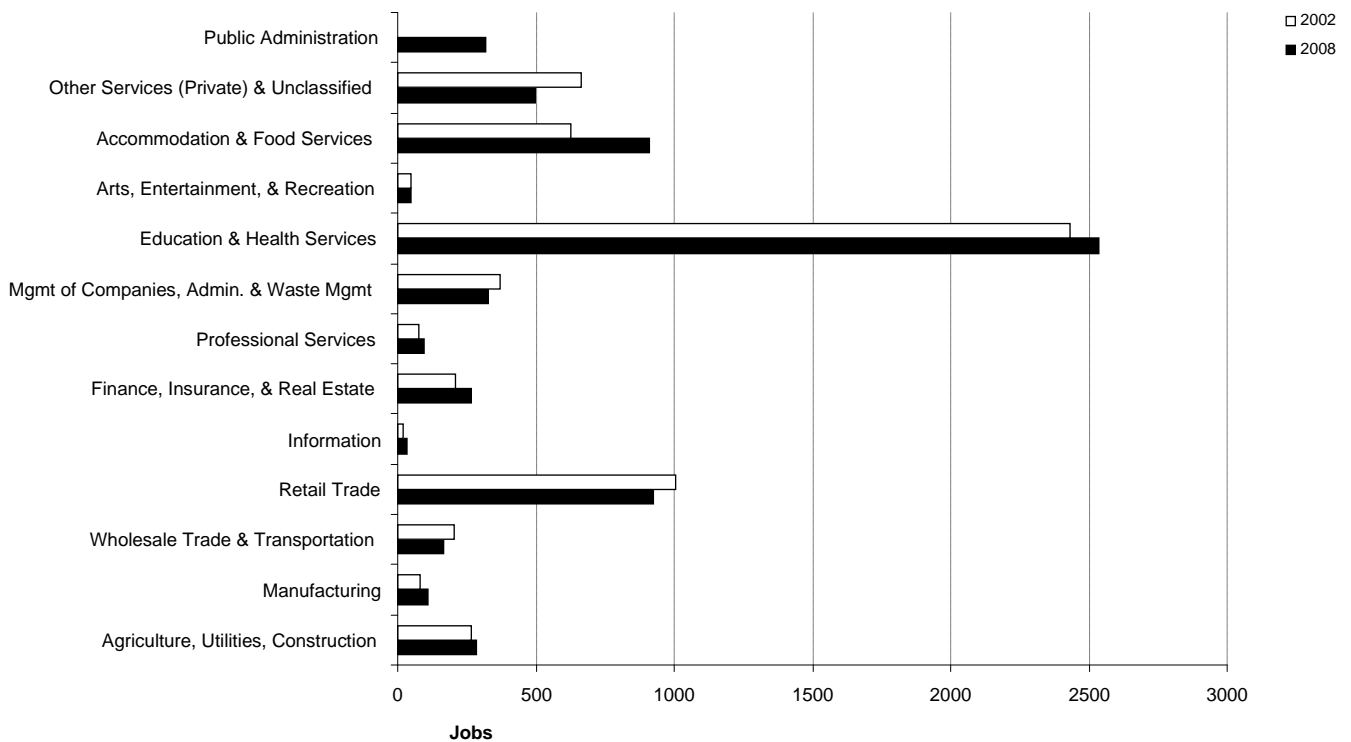
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

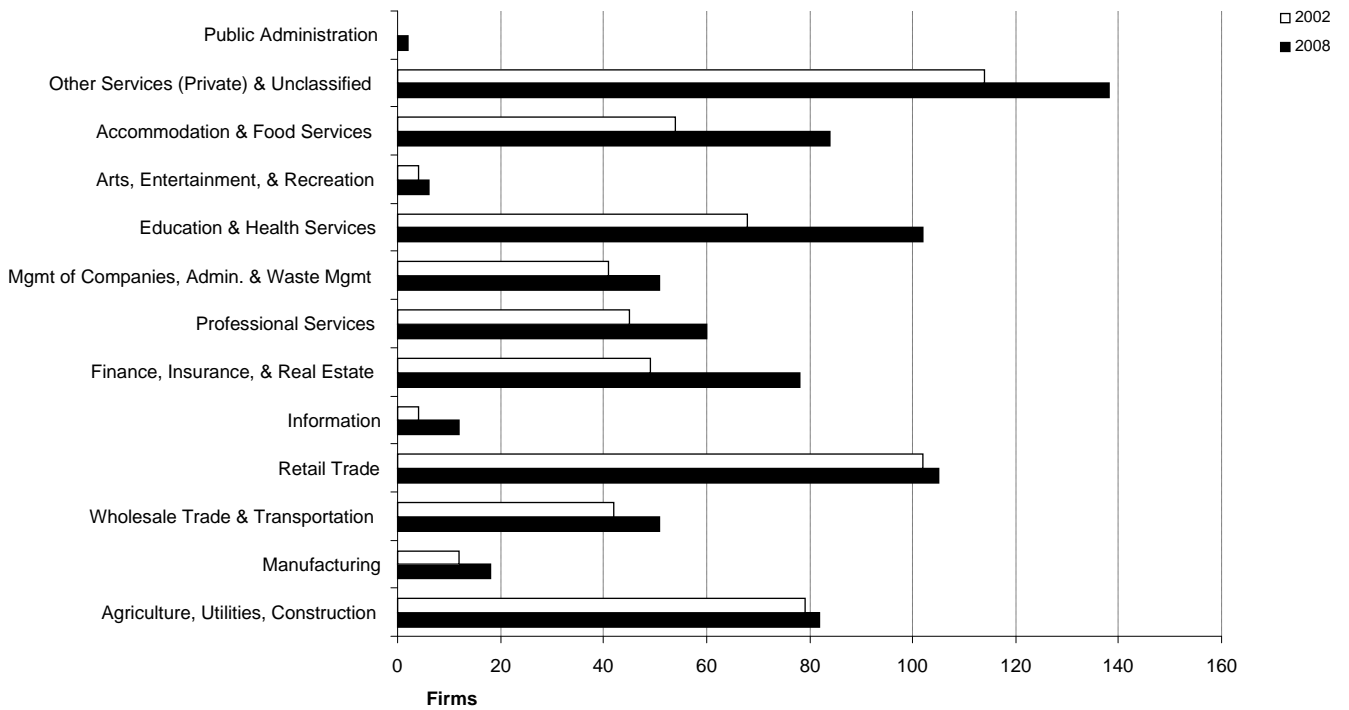
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	6,000	6,506	+506
Total Firms	614	789	+175
Average Annual Wages	\$22,191	\$28,995	+6,804

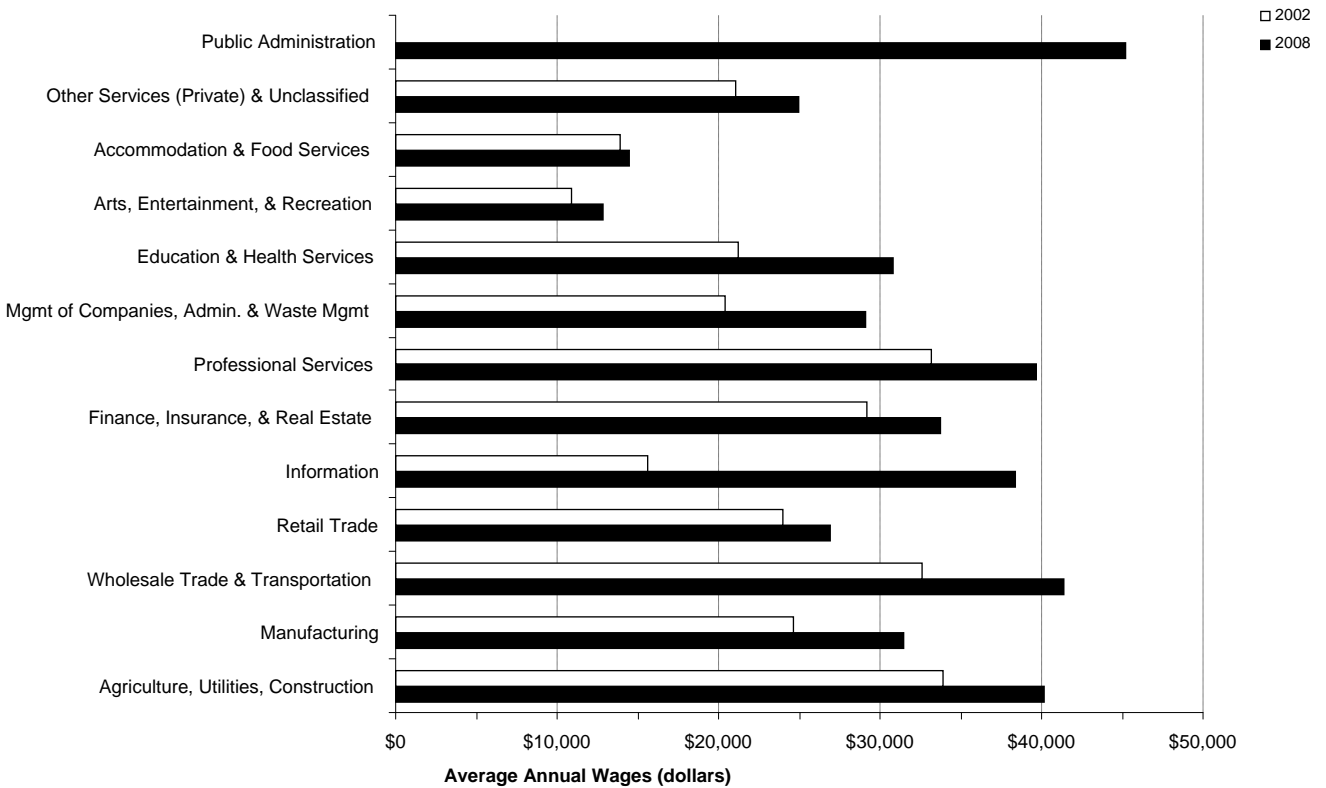
Total Jobs



Total Firms



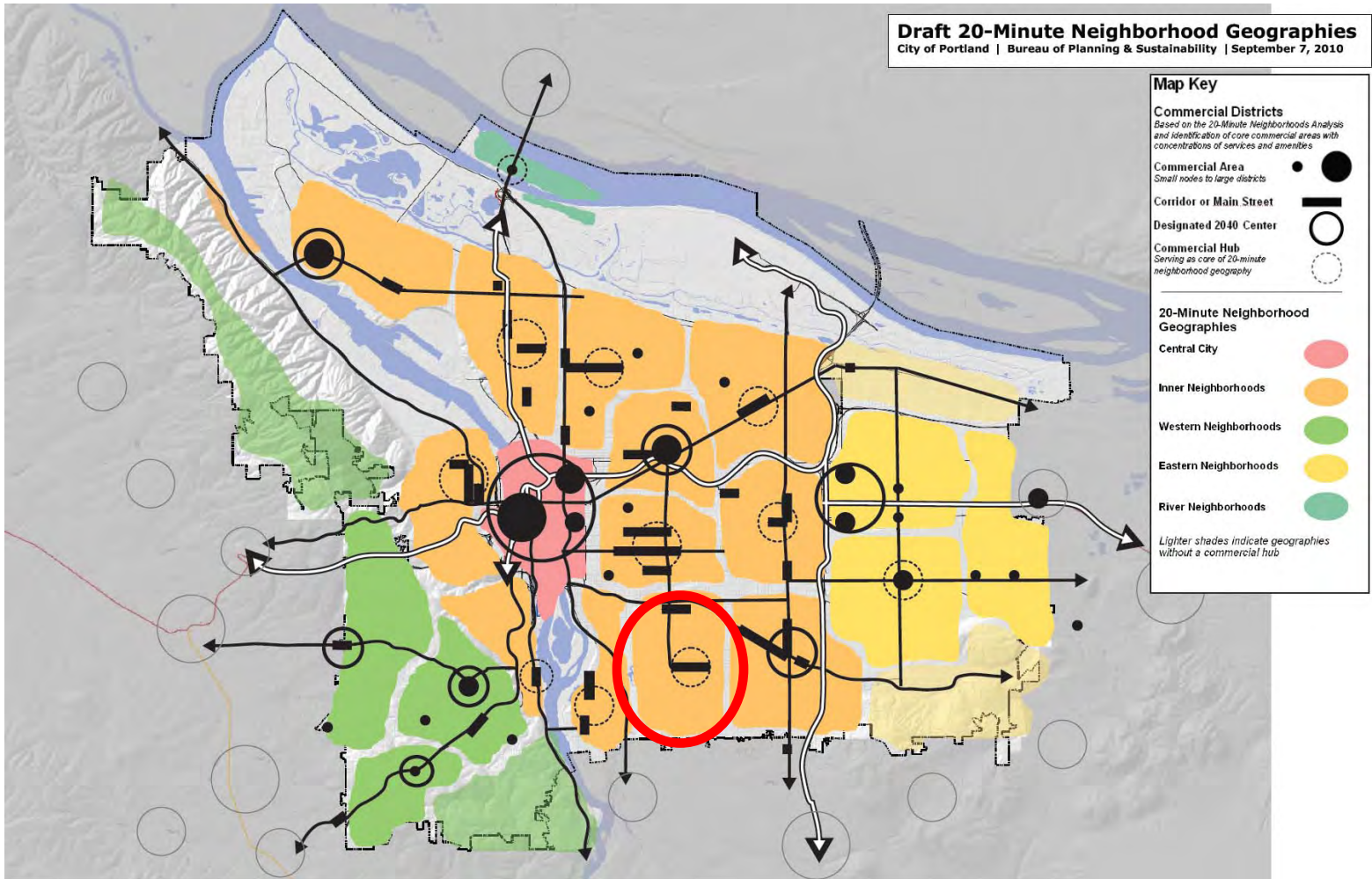
Average Annual Wages



Woodstock Analysis Area

Including Woodstock, Eastmoreland, Reed, Creston-Kenilworth, and parts of the Brentwood-Darlington neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Woodstock Analysis Area

Services and Amenities

Population: 31,300 people (13,200 households)
Land Area: 4.6 square miles (6,700 people per sq. mile)

Commercial Districts

The area's largest concentration of commercial services is located along SE Woodstock. There are also concentrations of commercial services at the area's northern edge along SE Powell and on SE Foster.

Grocery stores: 4

Community Amenities

Community Centers: 1 (Woodstock Community Center – no recreation facilities)

Libraries: 1 (Woodstock Library)

Parks and Open Spaces: 233 acres – including Crystal Springs Rhododendron Garden, Eastmoreland Golf Course, Tideman Johnson Natural Area, and Creston, Kenilworth, Berkeley and Woodstock parks.

Tree Canopy Coverage: 25%

Public Schools: 1 high school (Cleveland*)

5 K-8 schools (Duniway, Grout, and Woodstock elementary schools, Creston K-8, Lane Middle School*)

**At edge of analysis area*

Colleges (campus): 1 (Reed College)

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: None

Walkable Access Score: 61 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

Within 1/2 mile of a park: 100%

Within 1/2 mile of a public elementary school: 53%

Within 3 miles of a full-service community center: 96%

Within 1/2 mile of a full-service grocery store: 46%

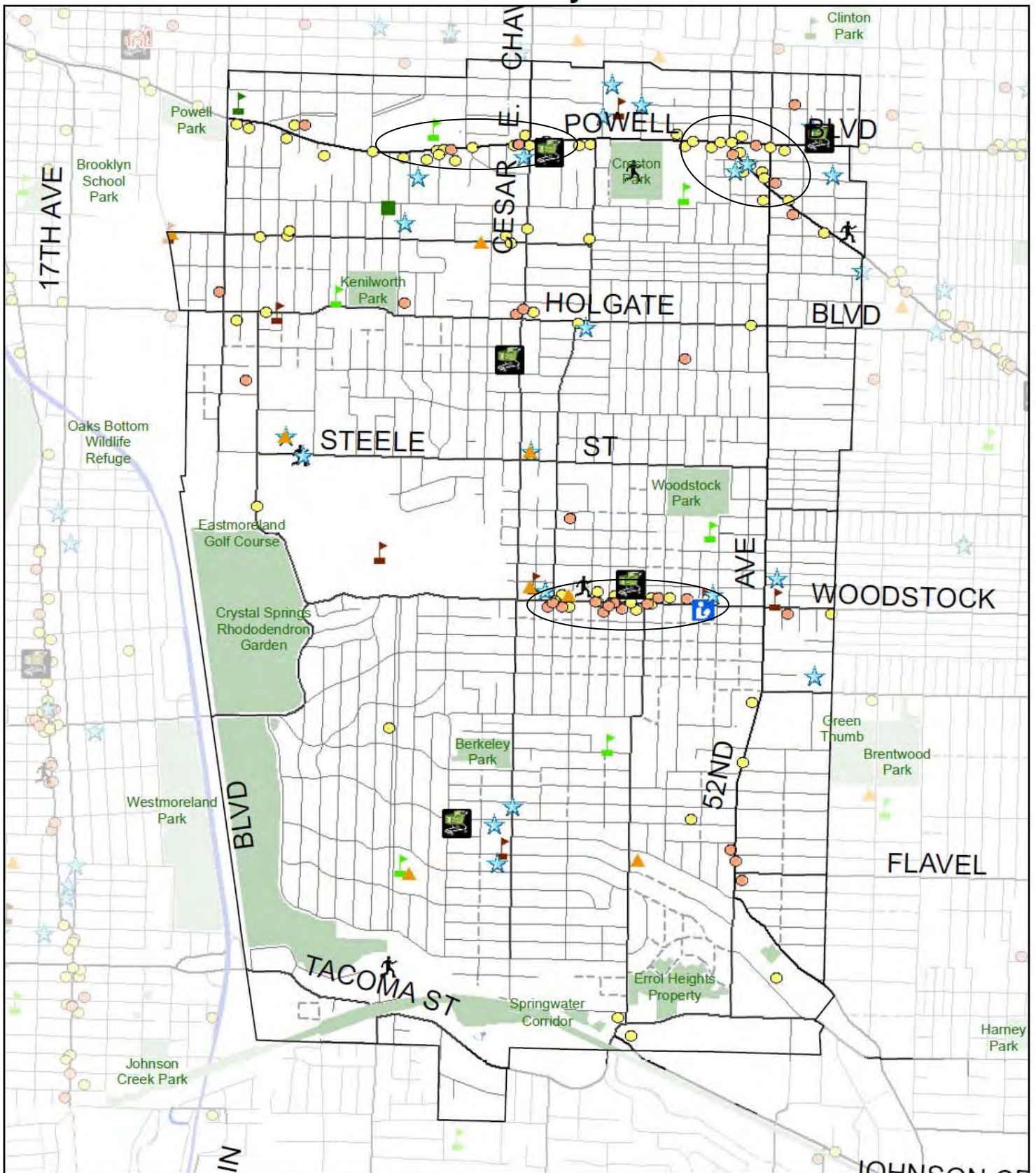
Within 1/4 mile of a frequent service transit stop: 41%

Neighborhood and Business Associations

Neighborhood Associations: Woodstock, Eastmoreland, Reed, Creston-Kenilworth, and parts of Brentwood-Darlington

Business Associations: Woodstock Community, Greater Brooklyn, and Foster Area business associations

Woodstock Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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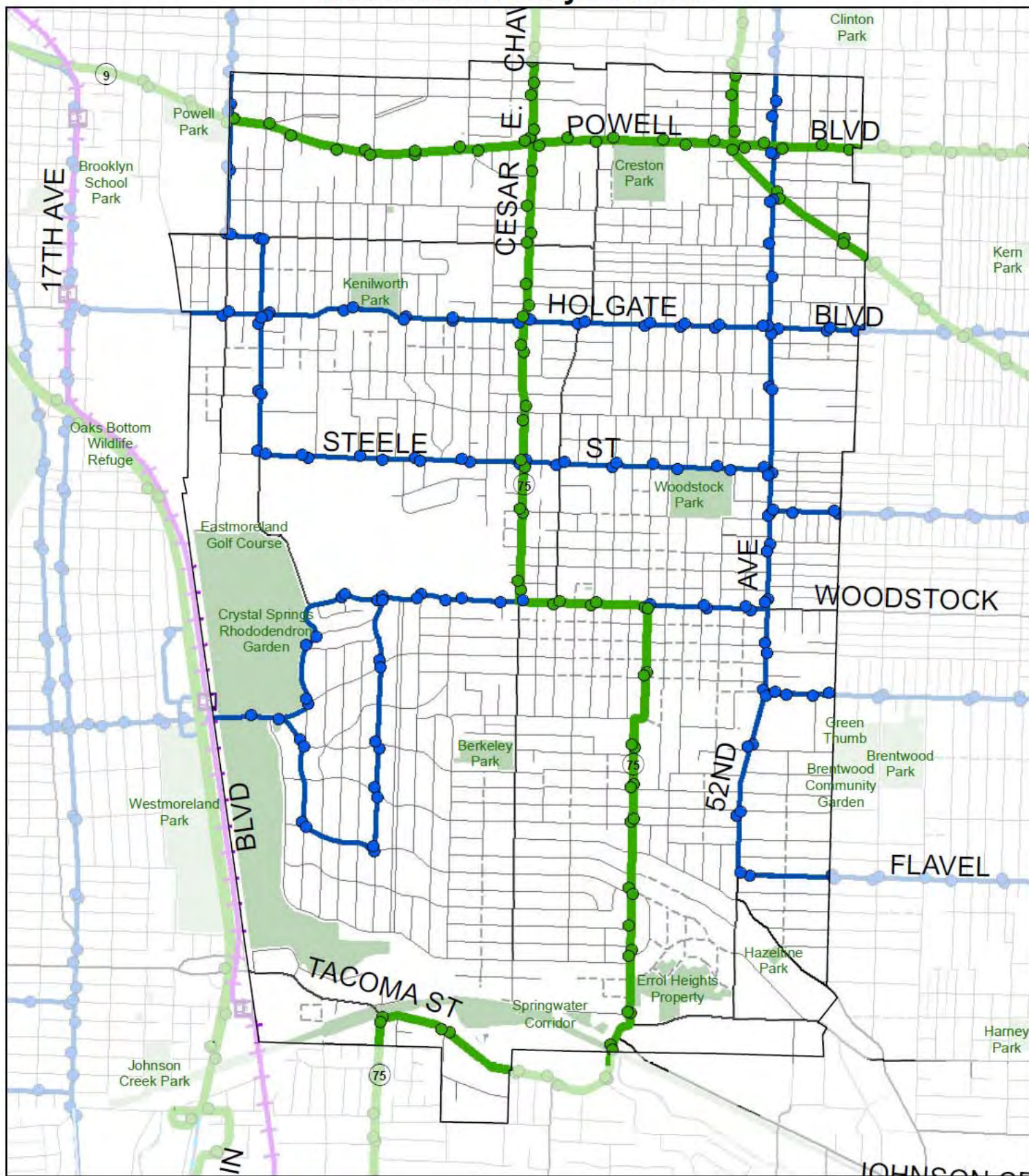


March 25, 2011

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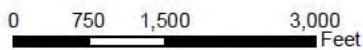
commercial data from InfoUSA 2008

Woodstock Analysis Area



Transit Infrastructure

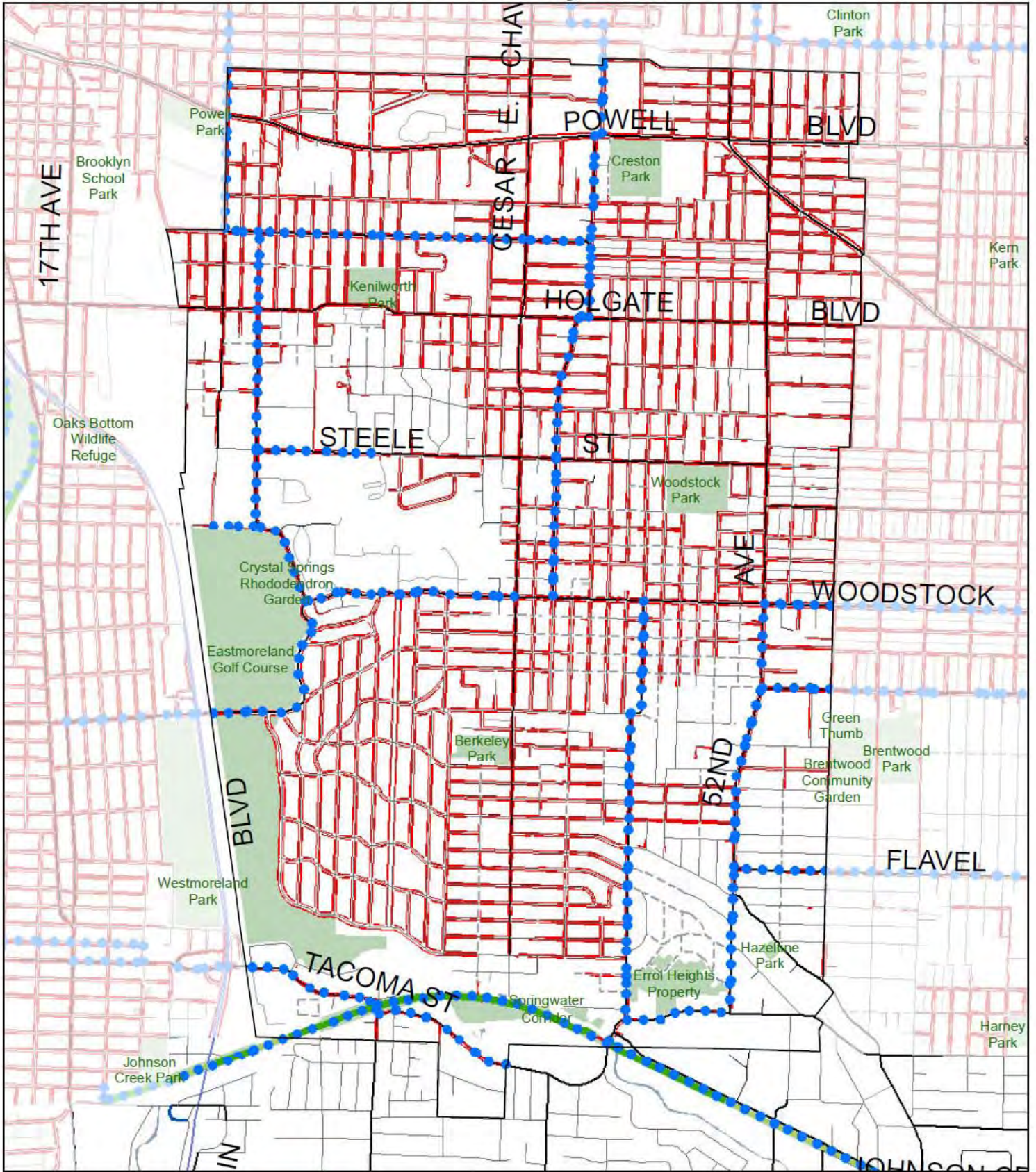
- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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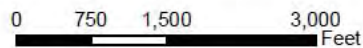
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Woodstock Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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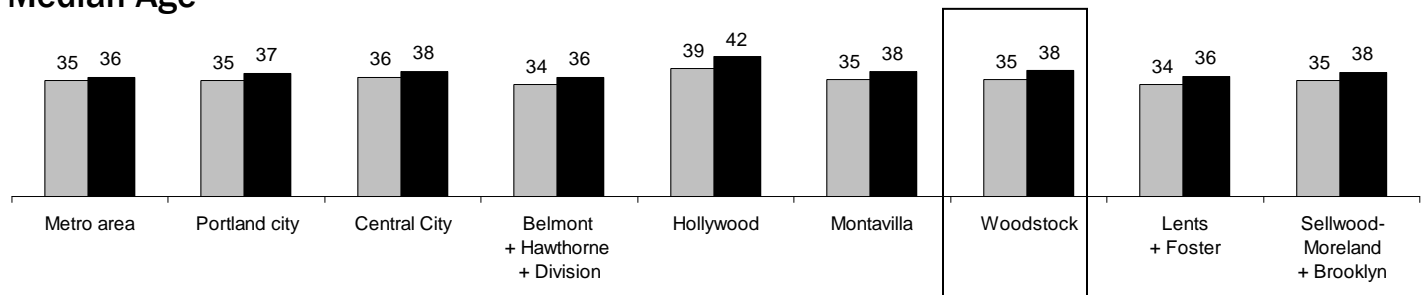
Woodstock Analysis Area Demographics (2000 – 2010)

Population

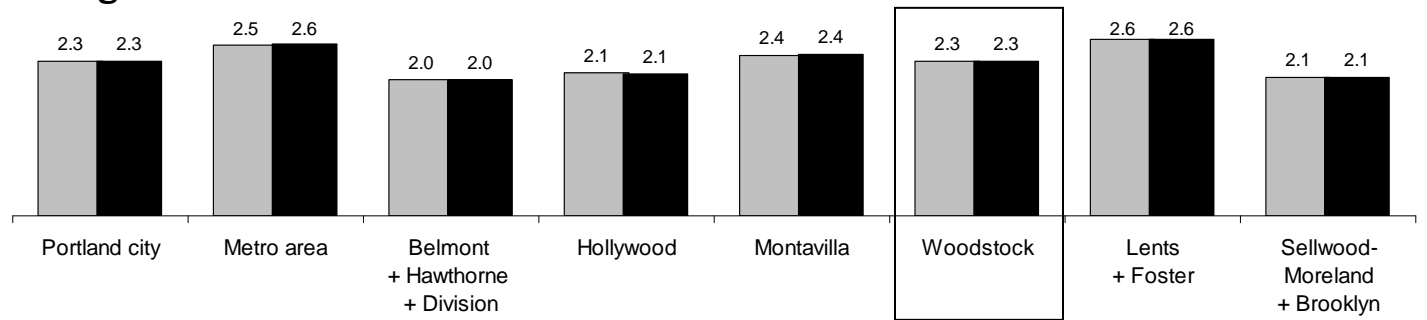
	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	2,226,000	589,000	30,931	36,907	30,699	31,581	31,266	43,891	15,349
2000	1,927,881	529,121	19,202	35,434	29,532	30,336	30,357	40,472	14,448
% change	12.9%	10.6%	61.1%	4.2%	4.0%	4.1%	3.0%	8.4%	6.2%

■ 2000 ■ 2010

Median Age

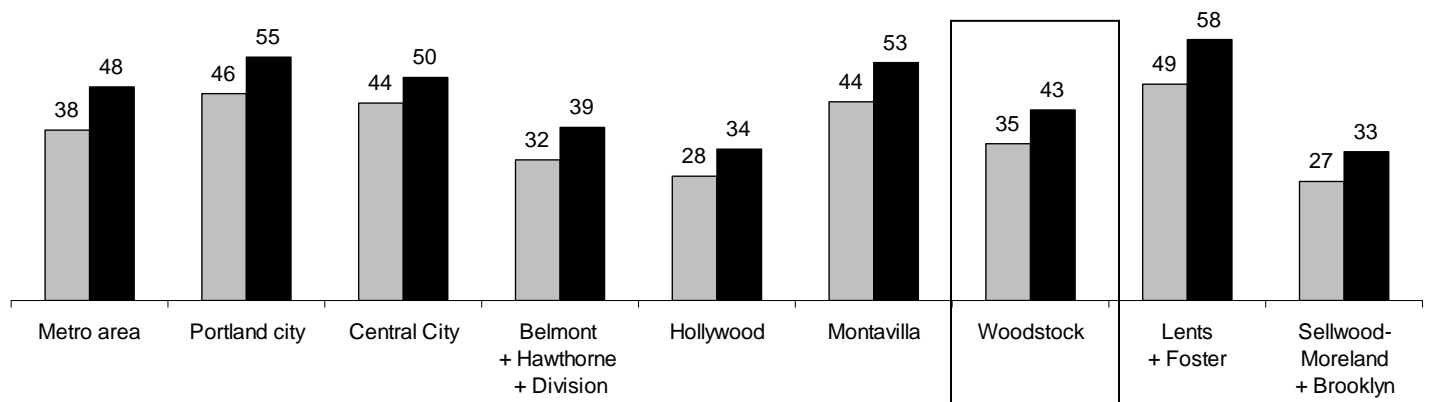


Average Household Size

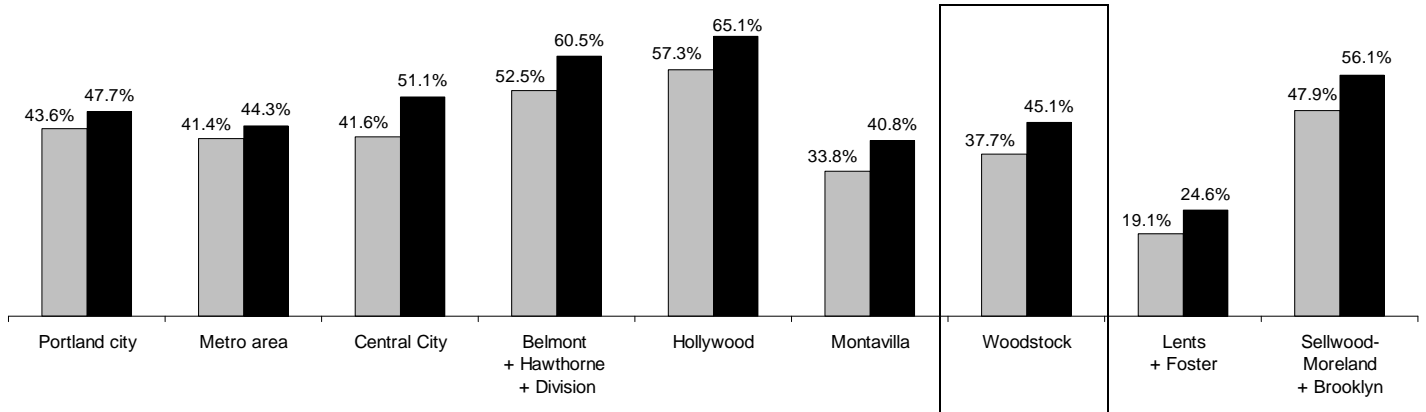


Diversity Index

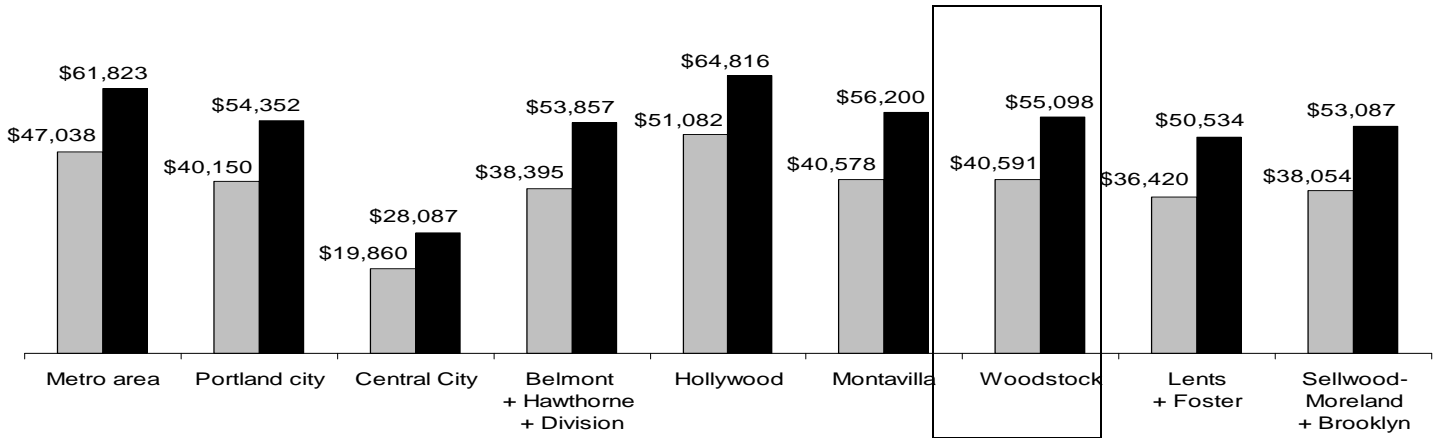
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



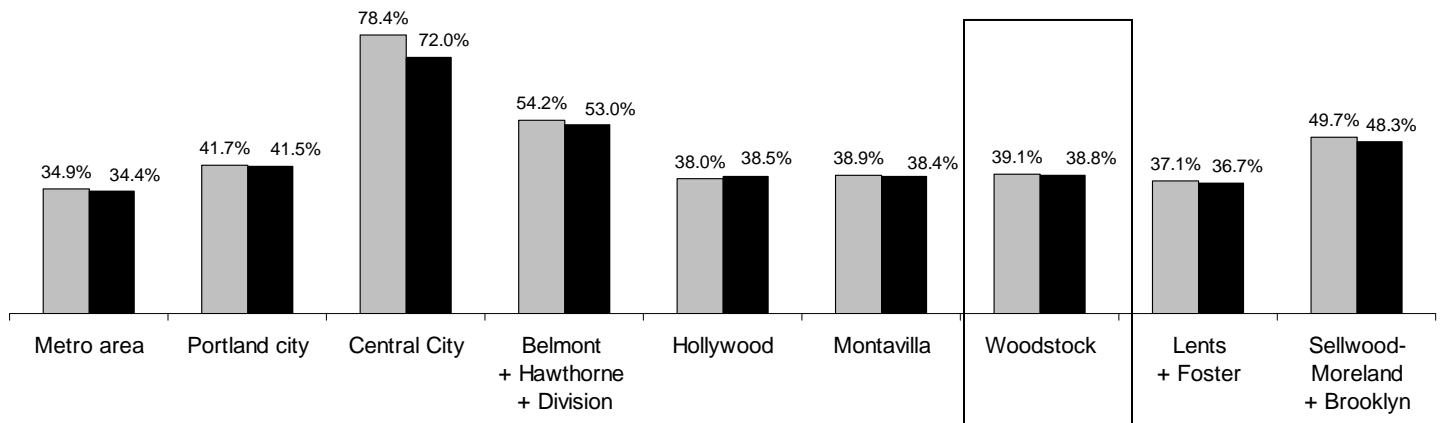
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	273,500	253,184	400,314	302,669	\$368,711	\$226,609	\$247,365	\$191,470	\$284,198
2000	168,347	154,721	250,566	181,054	\$223,268	\$141,422	\$152,397	\$120,837	\$170,779
% change	62.5%	63.6%	59.8%	67.2%	65.1%	60.2%	62.3%	58.5%	66.4%

Percent of Renters of Occupied Housing Units



Woodstock Analysis Area

Commercial Real Estate Indicators

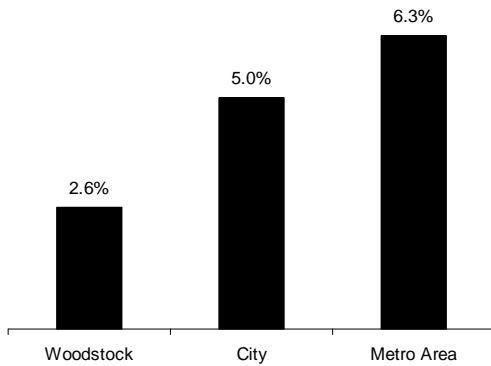
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

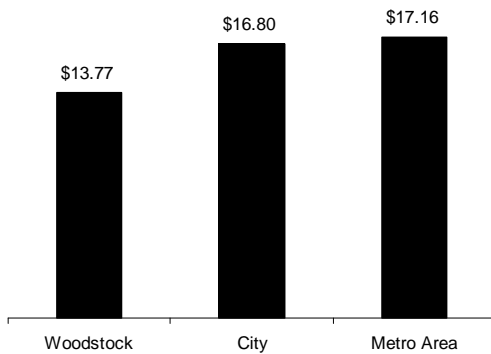
Square Feet

Woodstock	City	Metro Area
1,125,825	51,937,895	107,875,146

Retail Vacancy



Retail Rents

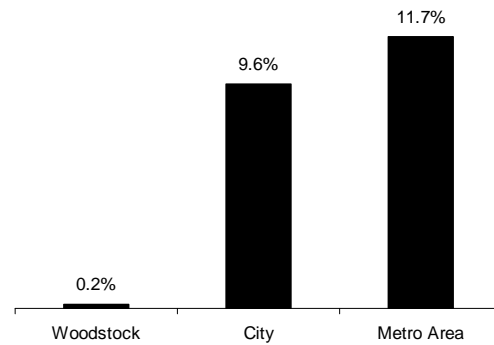


OFFICE SPACE

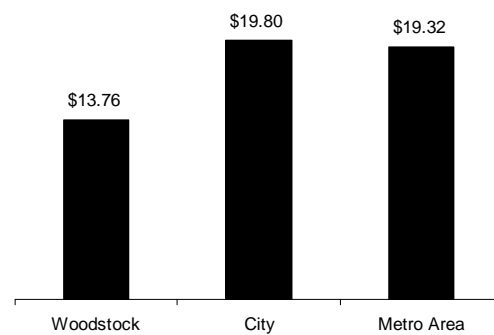
Square Feet

Woodstock	City	Metro Area
252,844	54,348,765	92,465,455

Office Vacancy



Office Rents



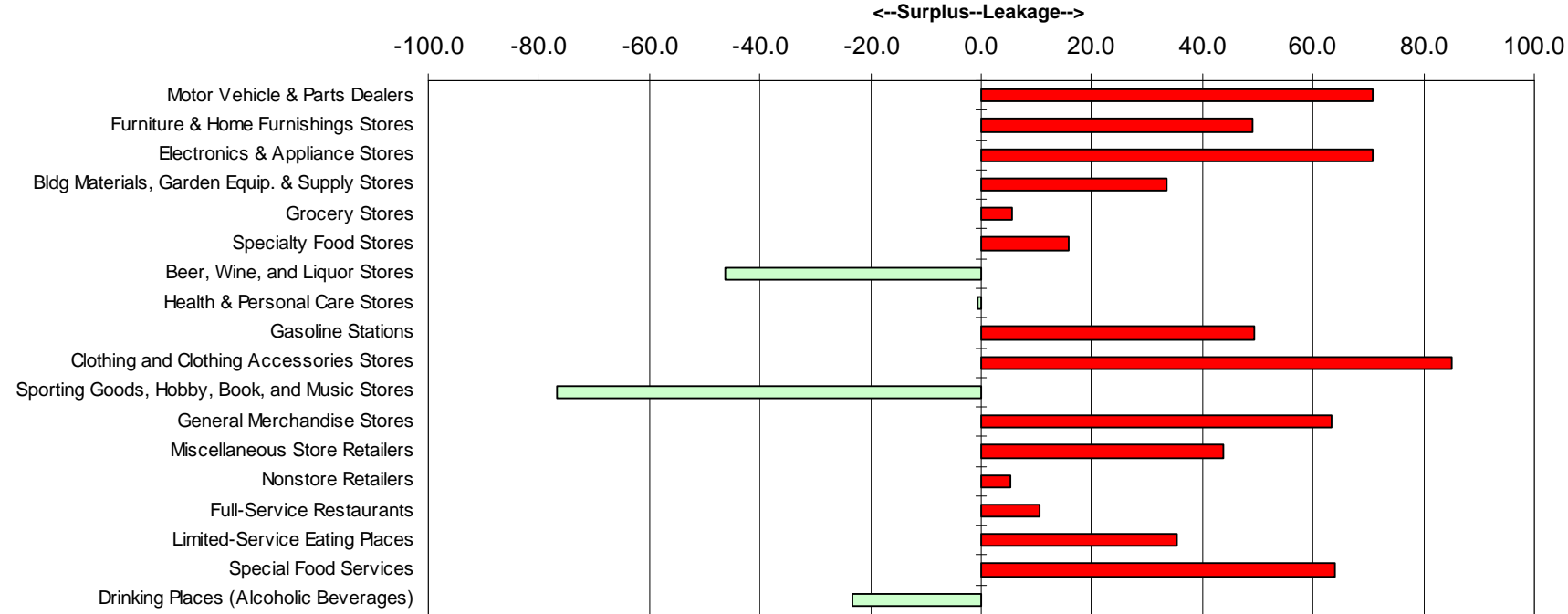
Woodstock Analysis Area

Retail Market Profile

Retail Gap = \$136 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$327,794,855	\$191,454,951	\$136,339,904	26.3	196
Total Retail Trade (NAICS 44-45)	\$279,542,679	\$159,253,521	\$120,289,158	27.4	130
Total Food & Drink (NAICS 722)	\$48,252,176	\$32,201,430	\$16,050,746	20.0	66

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Woodstock Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

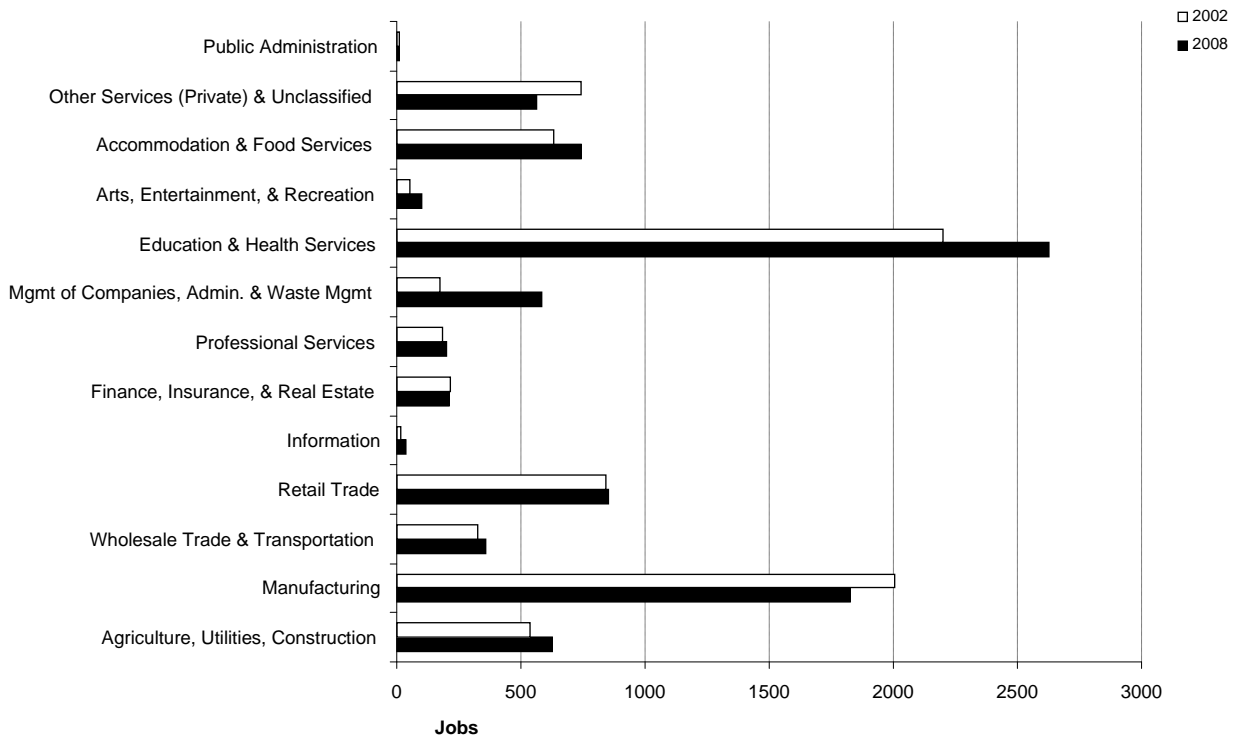
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

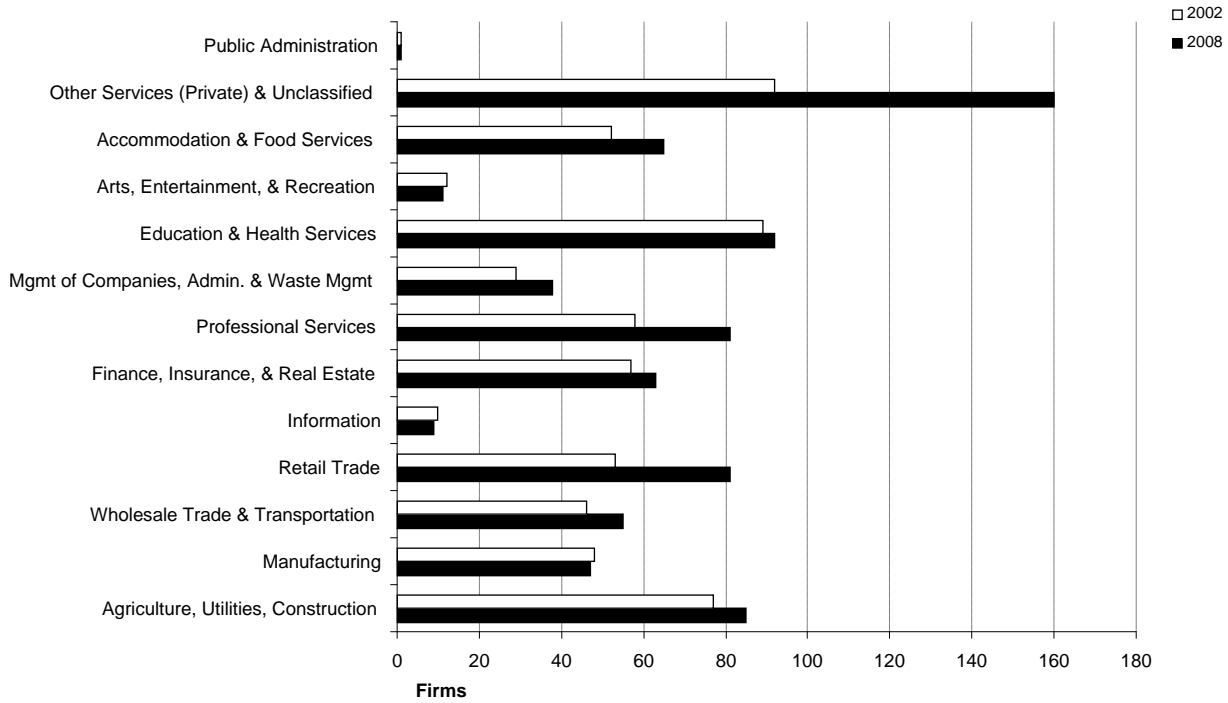
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	7,939	8,726	+787
Total Firms	624	788	+164
Average Annual Wages	\$30,622	\$35,277	+4,655

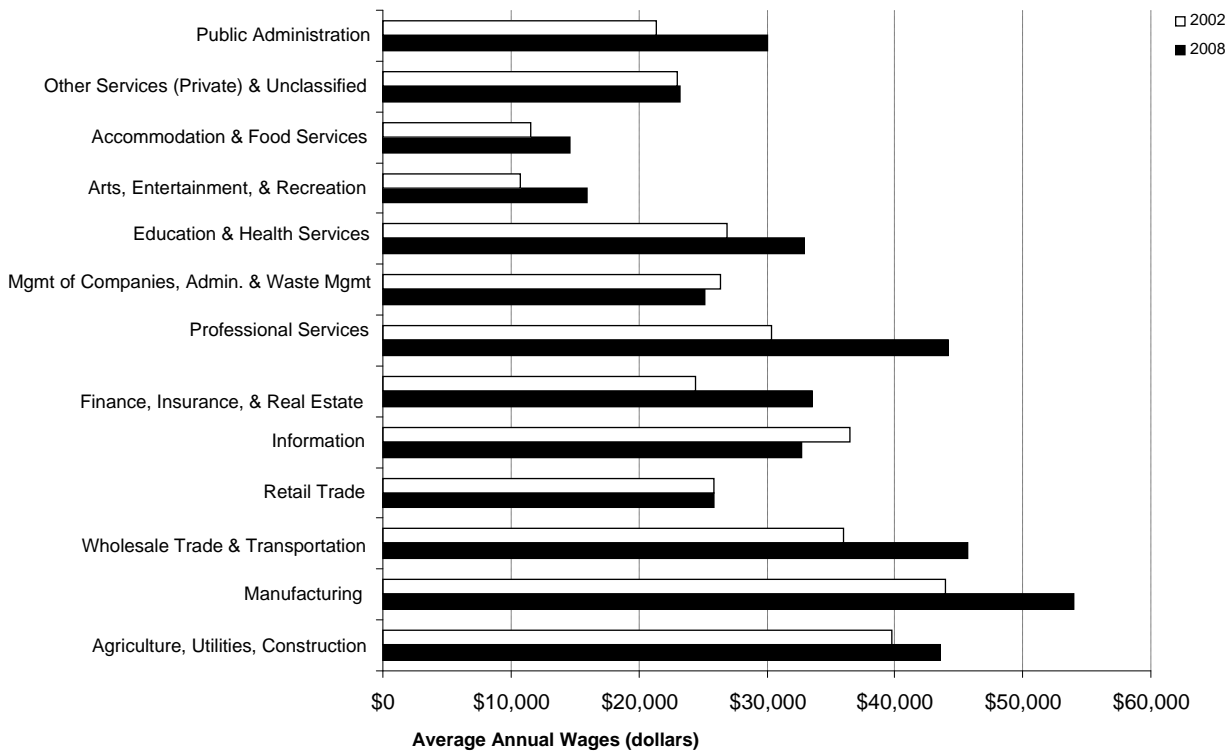
Total Jobs



Total Firms



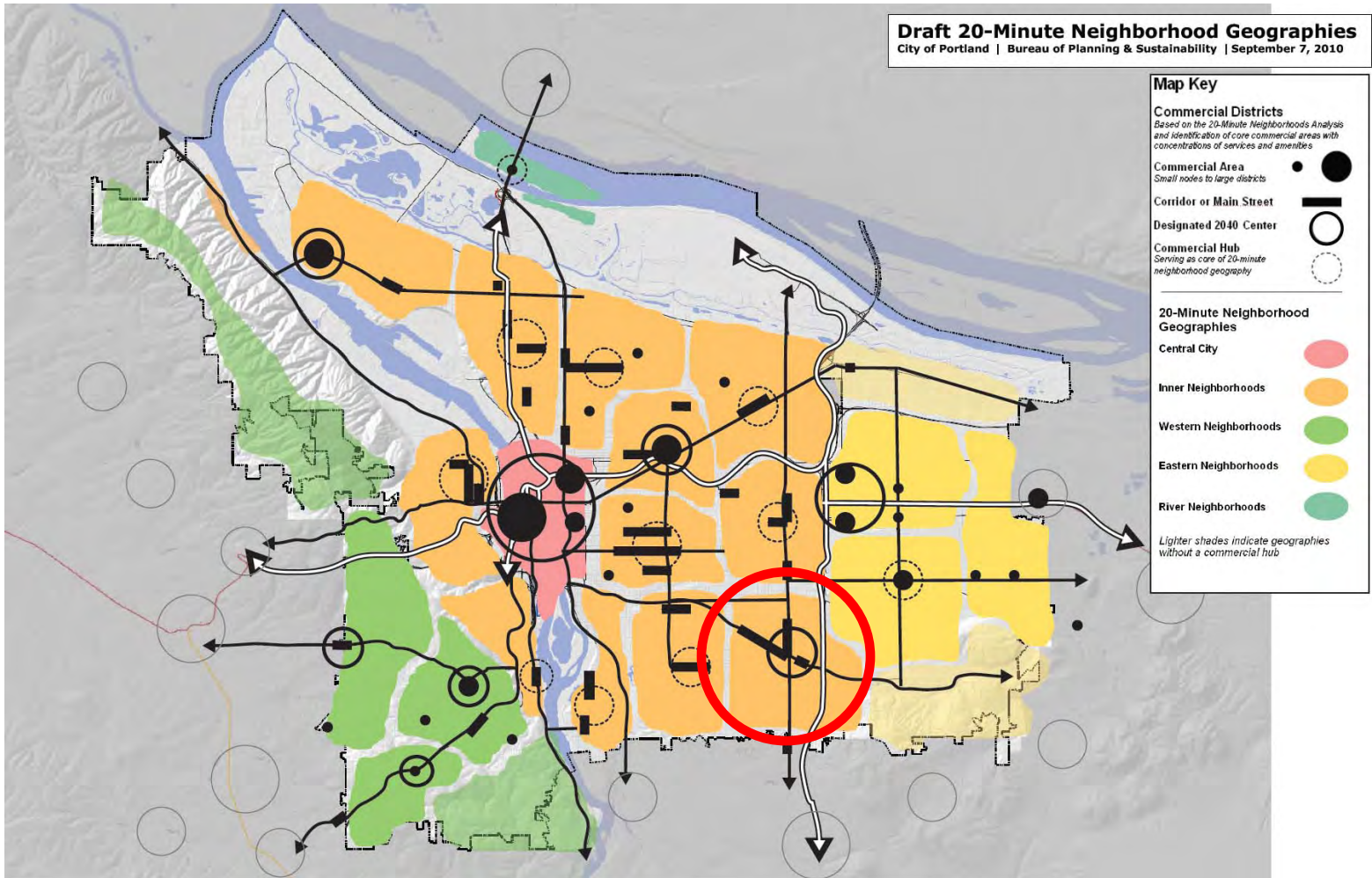
Average Annual Wages



Lents-Foster Analysis Area

Including Foster-Powell, Lents, Mt. Scott-Arleta, and Brentwood-Darlington neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Lents-Foster Analysis Area

Services and Amenities

Population: 43,900 people (16,800 households)
Land Area: 6.3 square miles (7,000 people per sq. mile)

Commercial Districts

The area's largest concentrations of commercial services are located along 82nd, particularly near SE Foster and between SE Holgate and Powell. This latter area includes the Eastport Plaza shopping center and its clustering of commercial services also extends along SE Powell. Other clusters of commercial services are located along Foster, particularly near SE Holgate and near 82nd Avenue; and in the Lents town center clustered around SE Foster and 92nd.

Grocery stores: 5

Community Amenities

Community Centers: 1 (Mt. Scott Community Center – full service)

Libraries: 1 (Albina Library)

Parks and Open Spaces: 213 acres - including Lents, Bloomington, Glenwood, Harney, Brentwood, and Mt. Scott parks; and the Veterans Creek Natural Area.

Tree Canopy Coverage: 20%

Public Schools: 6 K-8 schools (Kelly, Whitman, and Woodmere elementary schools; Lent and Marysville K-8s, Lane Middle School*)
**At edge of analysis area*

Colleges (campus): None

Hospitals: None

Farmers Markets: 1 (Lents International Farmers' Market)

Transit Centers/Stations: 4 (Powell, Holgate, Lents Town Center, and Flavel light rail stations)

Walkable Access Score: 57 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

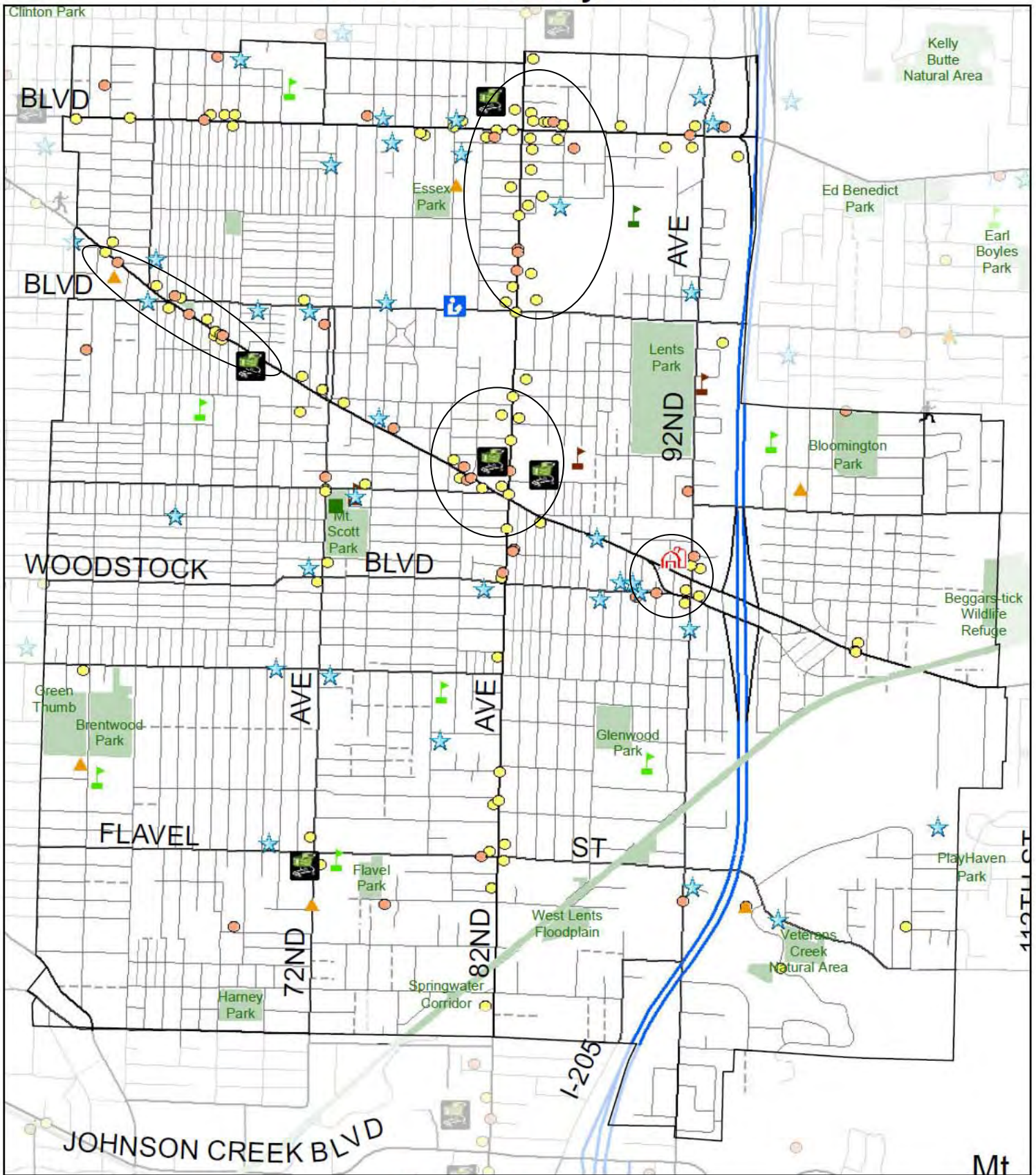
Within 1/2 mile of a park:	95%
Within 1/2 mile of a public elementary school:	40%
Within 3 miles of a full-service community center:	100%
Within 1/2 mile of a full-service grocery store:	31%
Within 1/4 mile of a frequent service transit stop:	43%

Neighborhood and Business Associations

Neighborhood Associations: Foster-Powell, Lents, Mt. Scott-Arleta, and Brentwood-Darlington

Business Associations: 82nd Avenue and Foster Area business associations

Lents-Foster Analysis Area

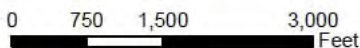


Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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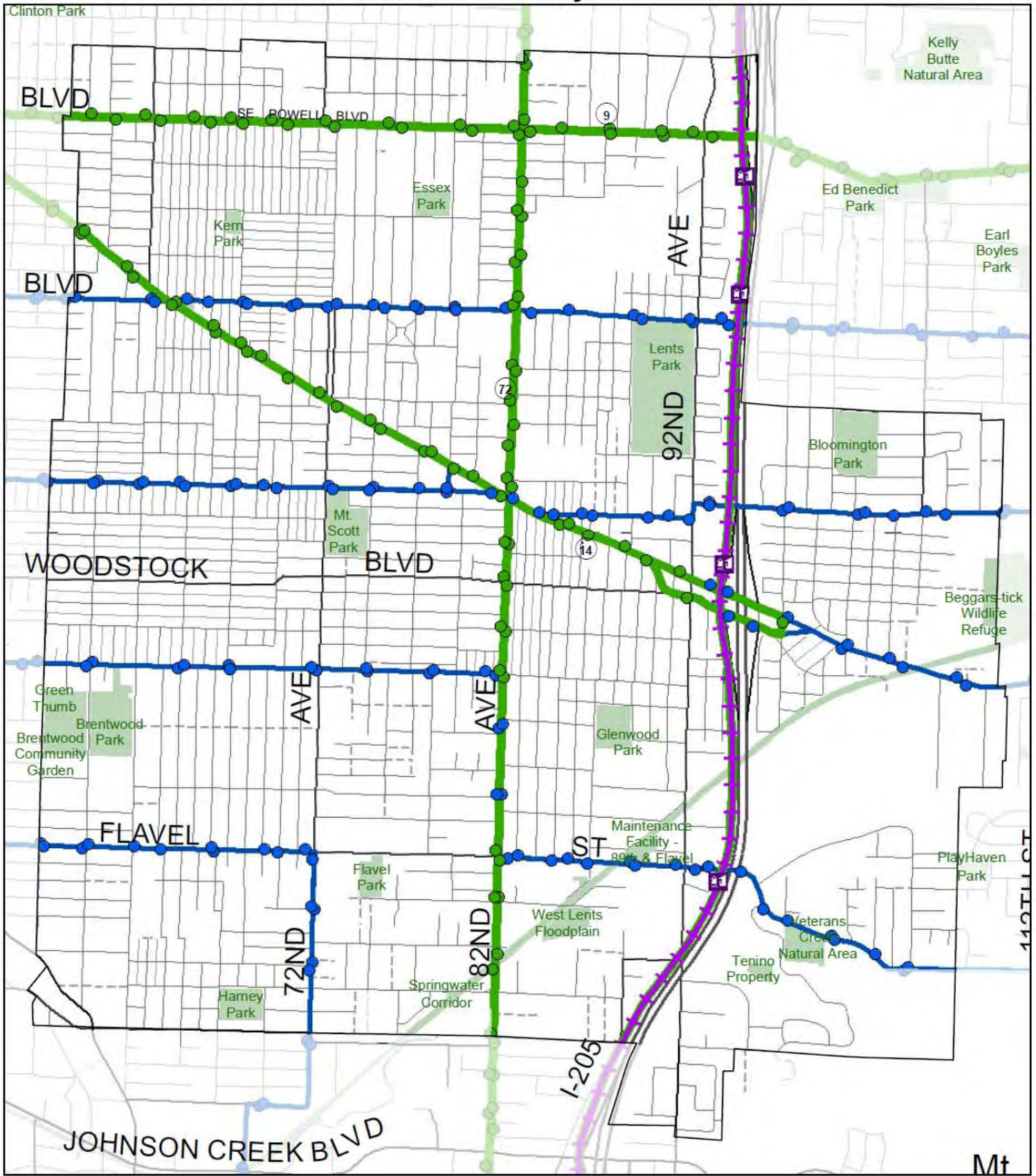


March 25, 2011

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commercial data from InfoUSA 2008

Lents-Foster Analysis Area



Transit Infrastructure

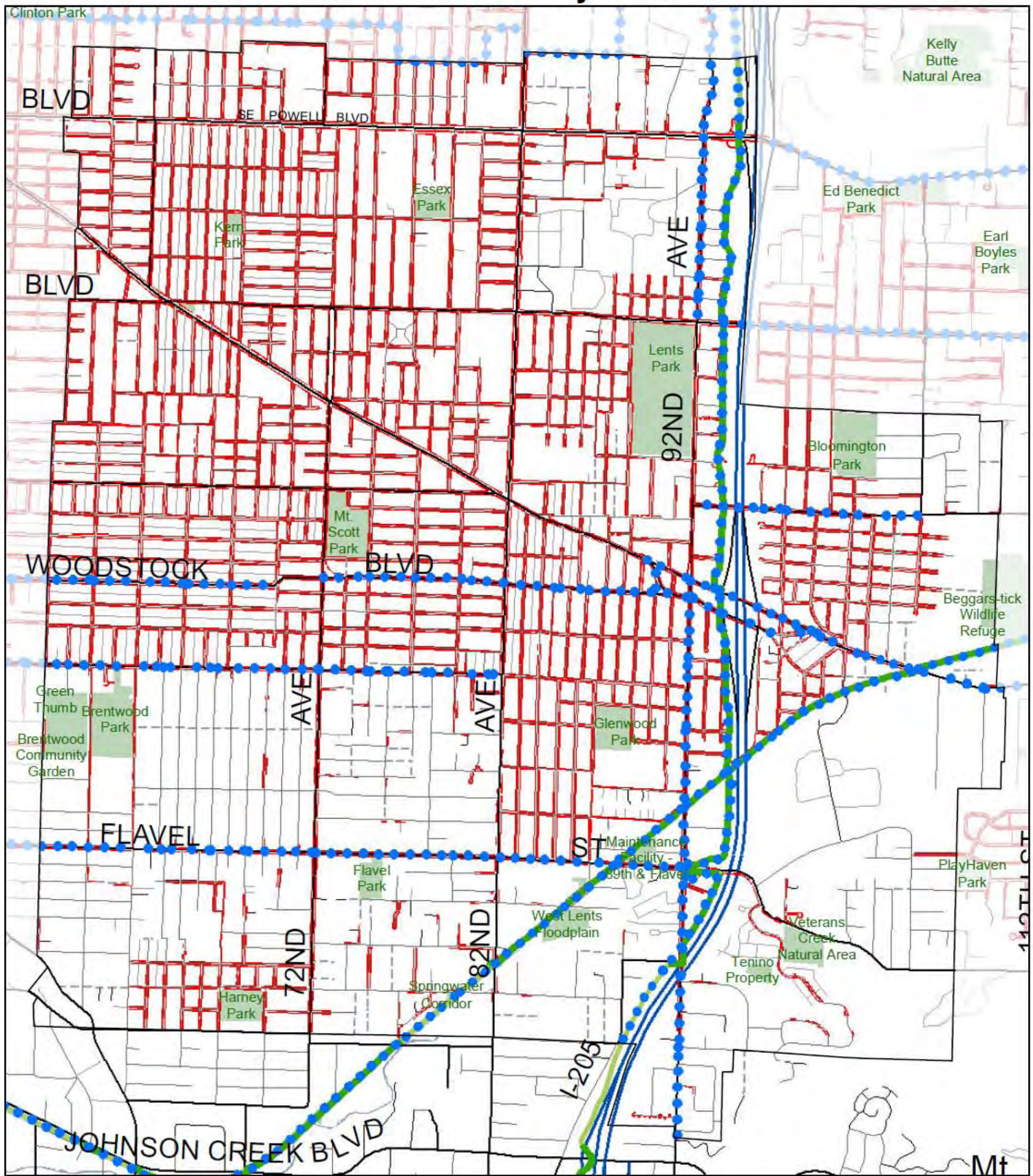
- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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Lents-Foster Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

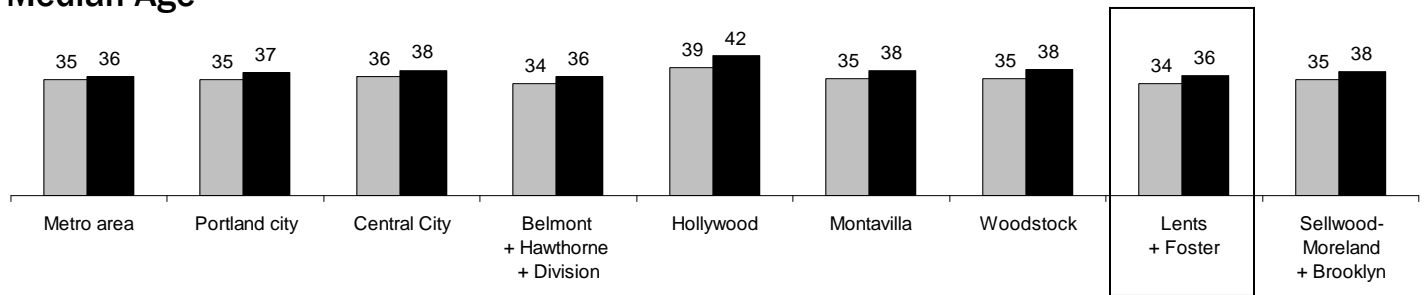
Lents-Foster Analysis Area Demographics (2000 – 2010)

Population

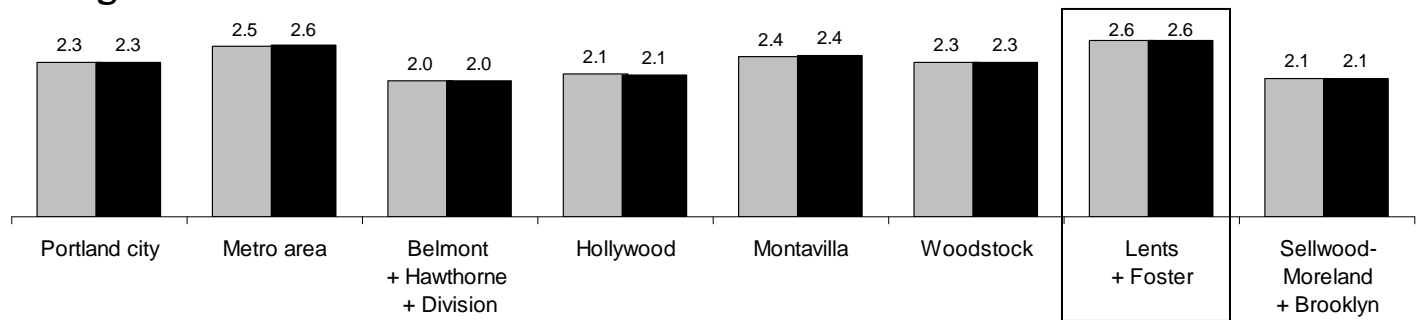
	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
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% change	12.9%	10.6%	61.1%	4.2%	4.0%	4.1%	3.0%	8.4%	6.2%

■ 2000 ■ 2010

Median Age

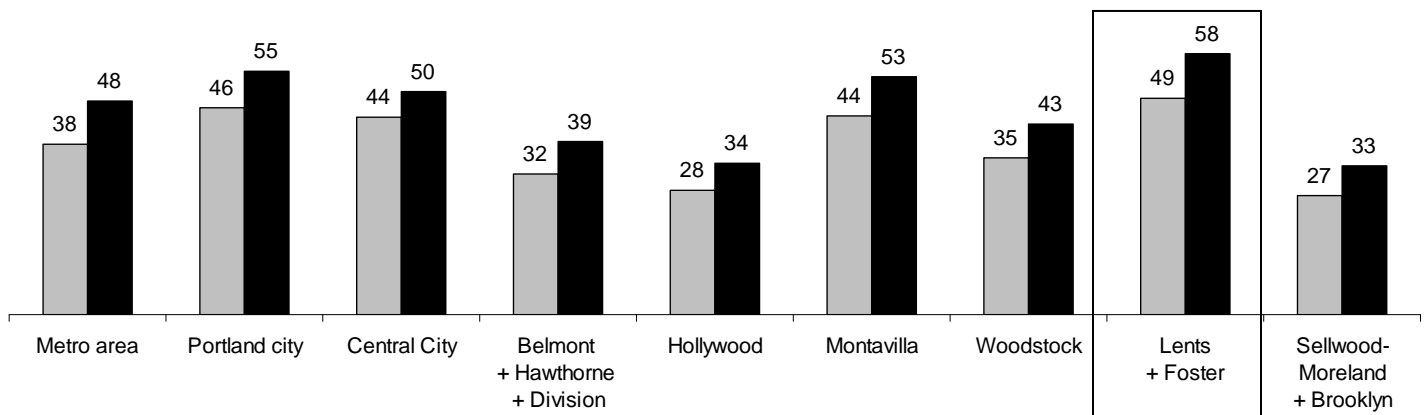


Average Household Size

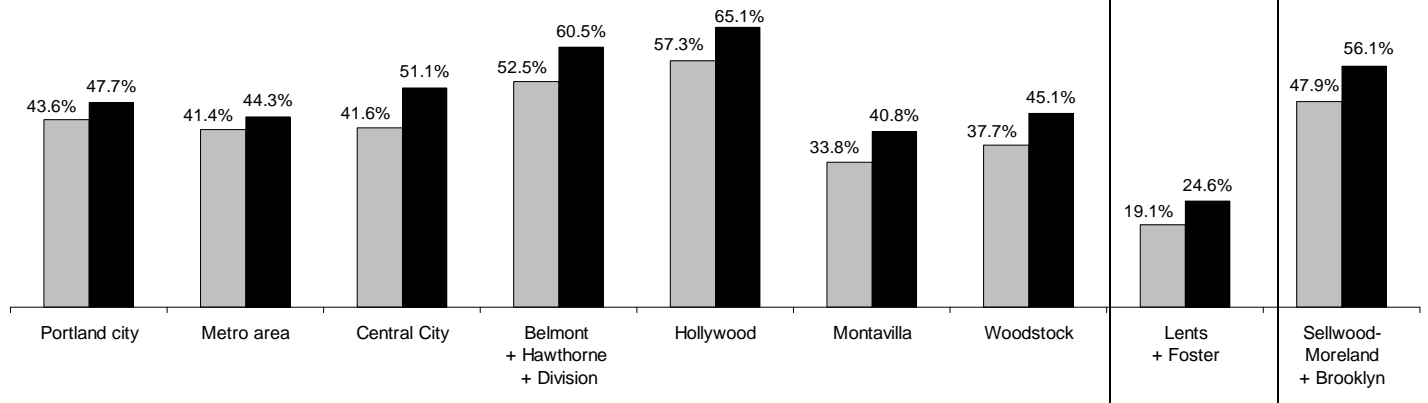


Diversity Index

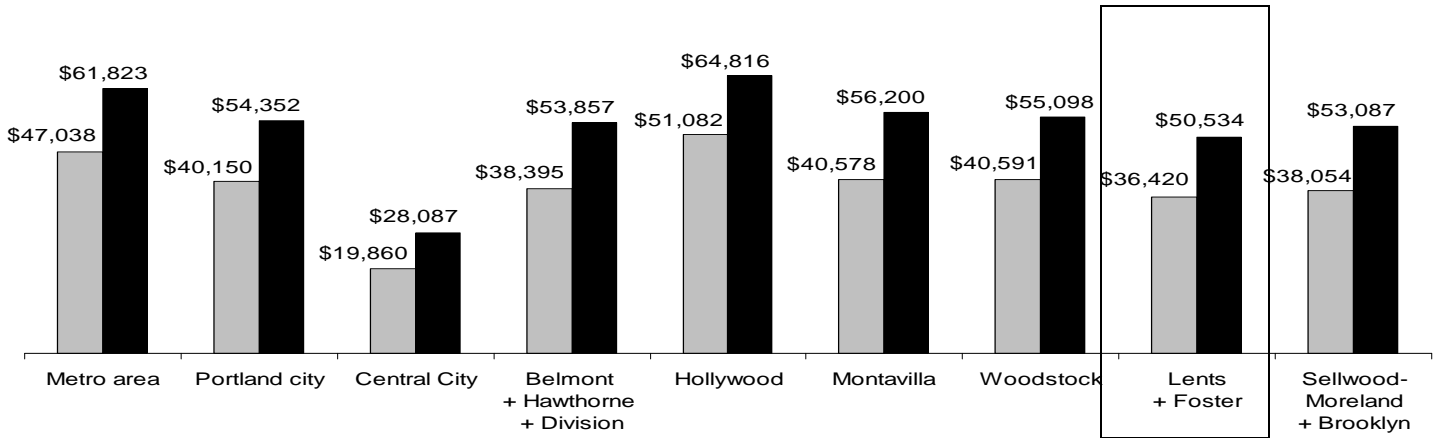
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



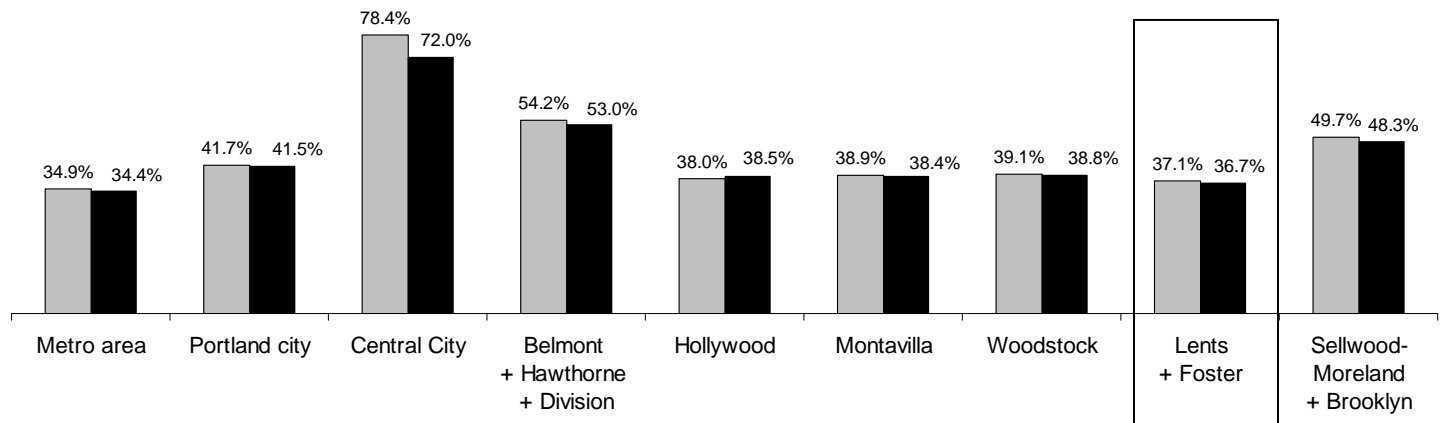
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	273,500	253,184	400,314	302,669	\$368,711	\$226,609	\$247,365	\$191,470	\$284,198
2000	168,347	154,721	250,566	181,054	\$223,268	\$141,422	\$152,397	\$120,837	\$170,779
% change	62.5%	63.6%	59.8%	67.2%	65.1%	60.2%	62.3%	58.5%	66.4%

Percent of Renters of Occupied Housing Units



Lents-Foster Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

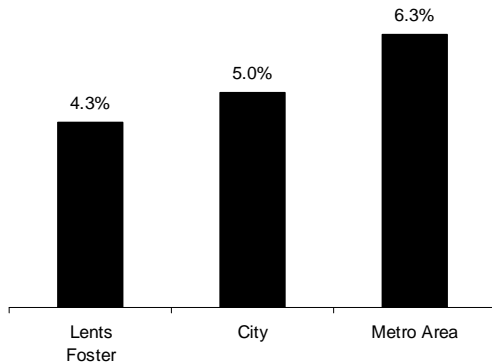
Lents Foster	City	Metro Area
1,125,825	51,937,895	107,875,146

OFFICE SPACE

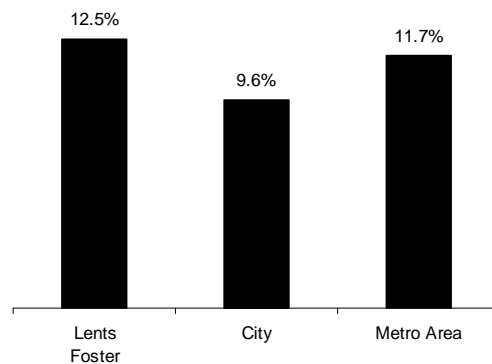
Square Feet

Lents Foster	City	Metro Area
252,844	54,348,765	92,465,455

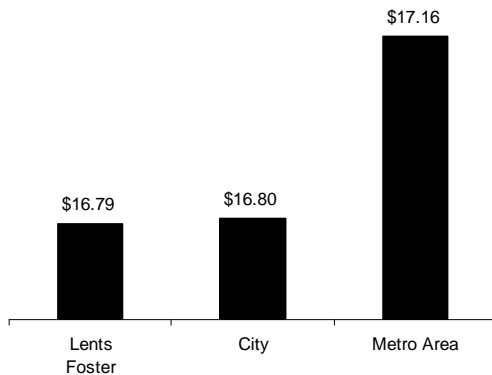
Retail Vacancy



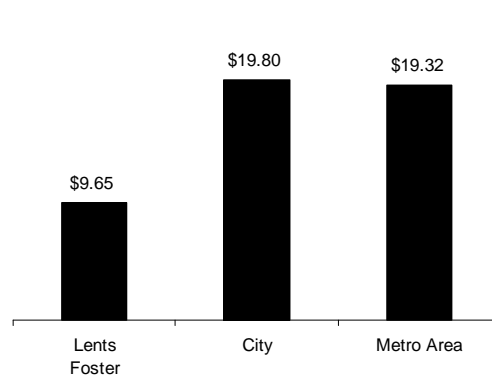
Office Vacancy



Retail Rents



Office Rents



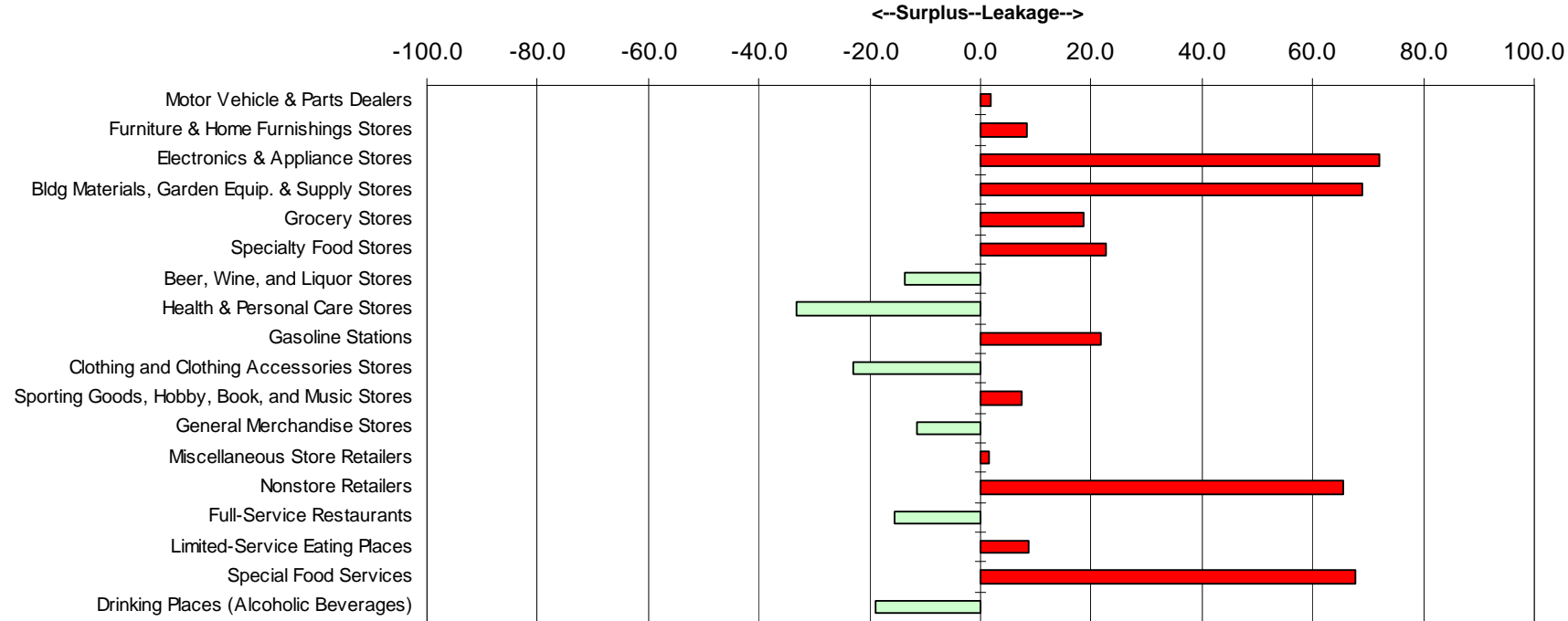
Lents-Foster Analysis Area

Retail Market Profile

Retail Gap = \$34 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$345,272,969	\$311,166,451	\$34,106,518	5.2	330
Total Retail Trade (NAICS 44-45)	\$294,557,571	\$260,989,428	\$33,568,143	6.0	221
Total Food & Drink (NAICS 722)	\$50,715,398	\$50,177,023	\$538,375	0.5	109

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Lents-Foster Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

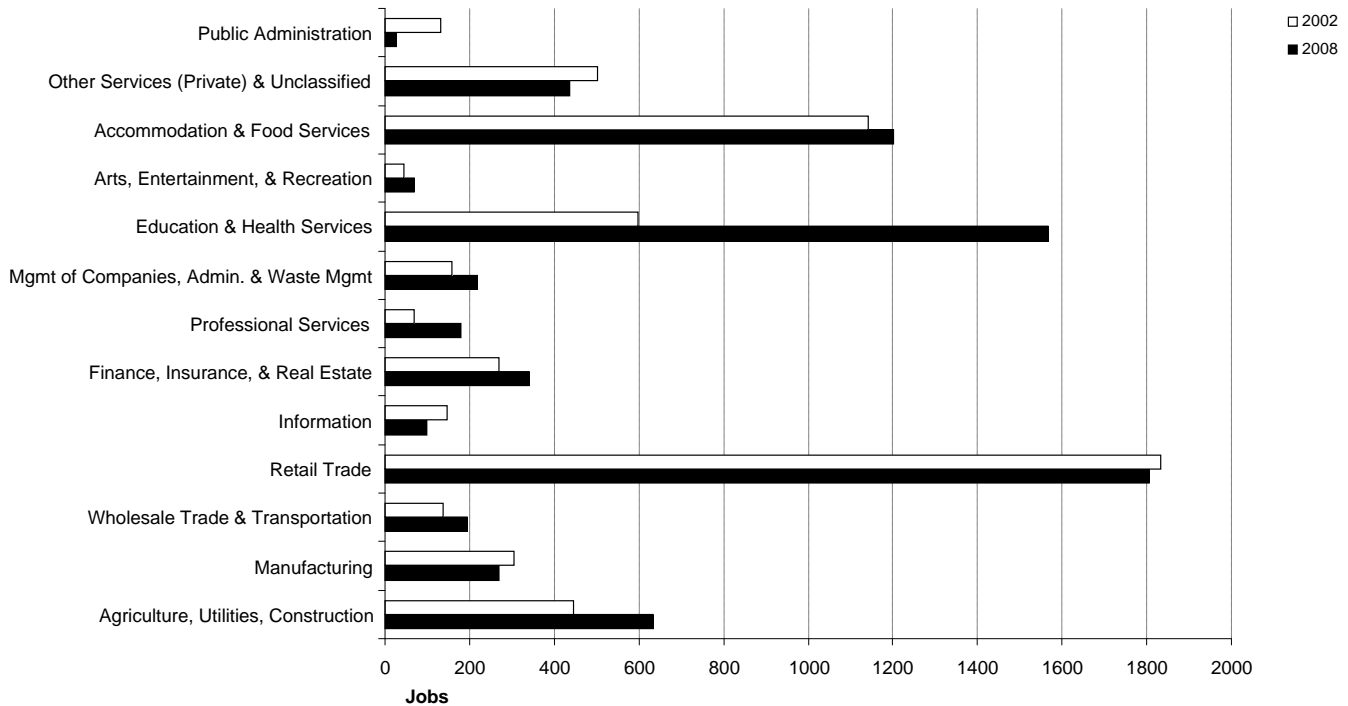
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

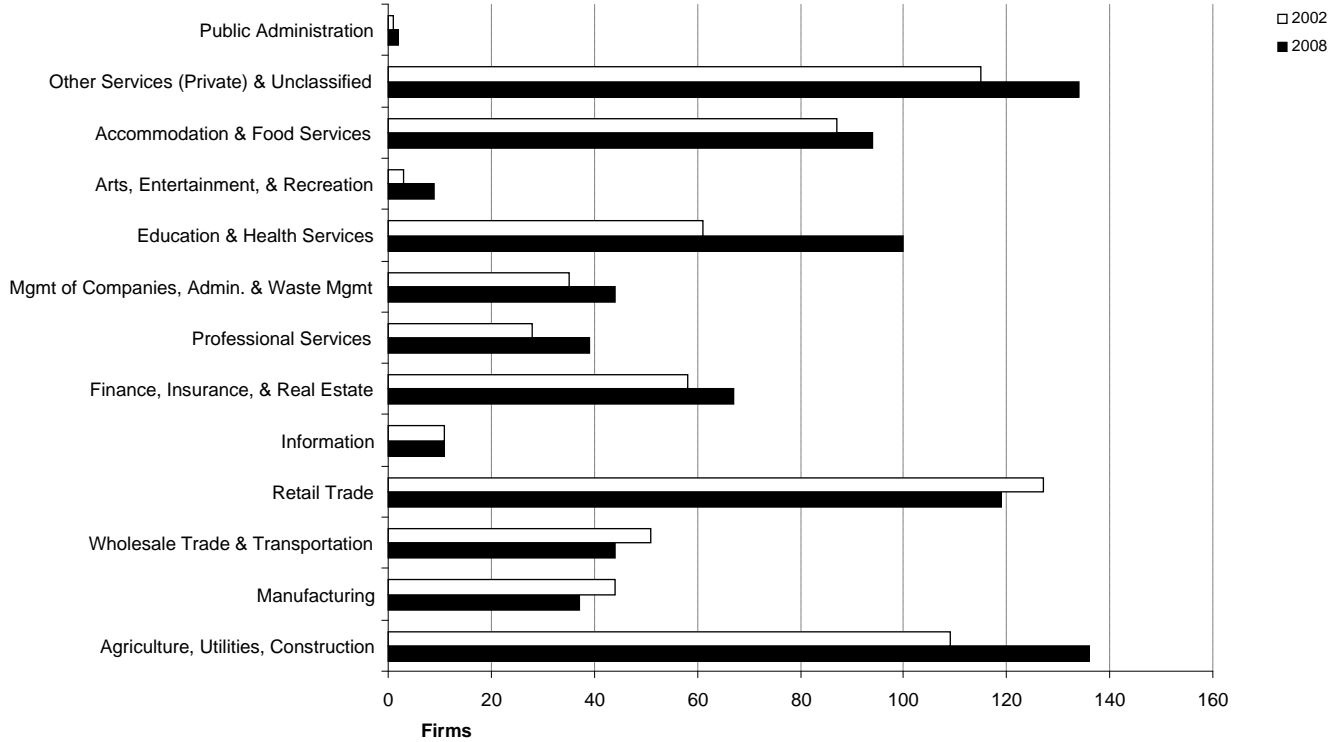
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	5,785	7,040	+1,255
Total Firms	730	836	+106
Average Annual Wages	\$24,514	\$28,202	+3,687

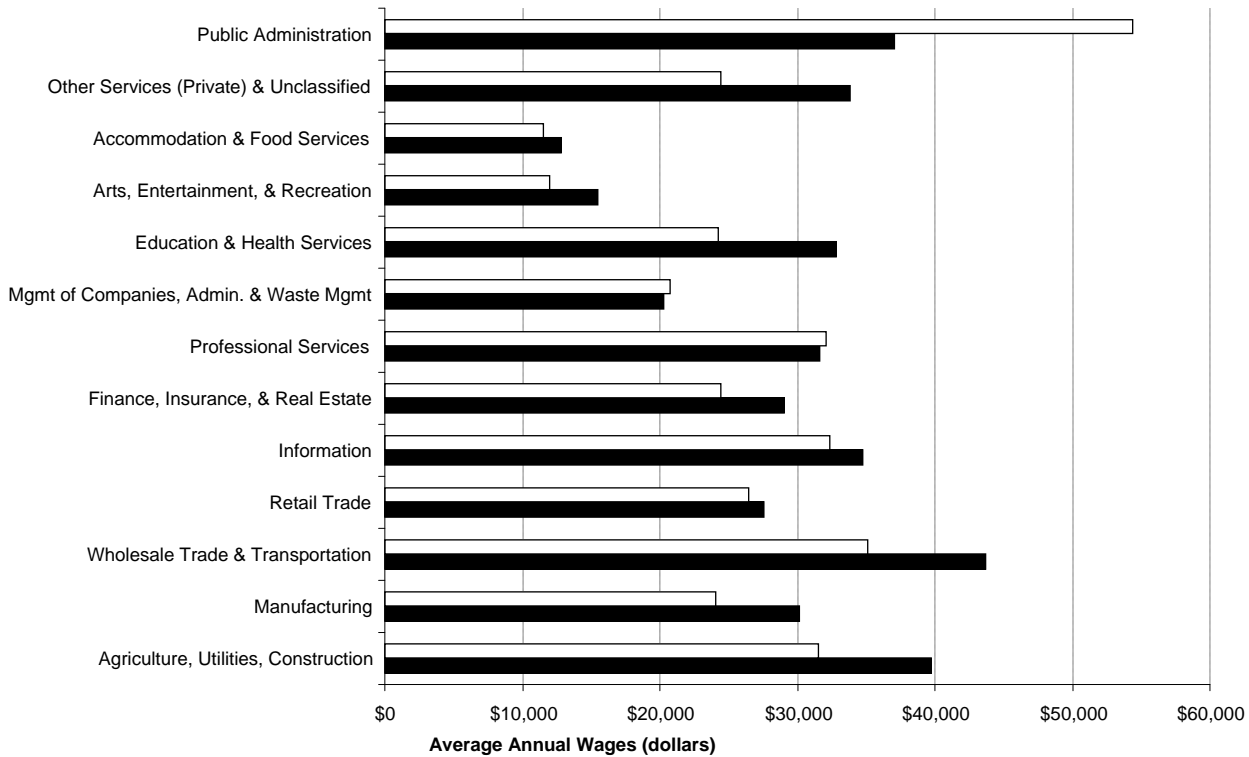
Total Jobs



Total Firms



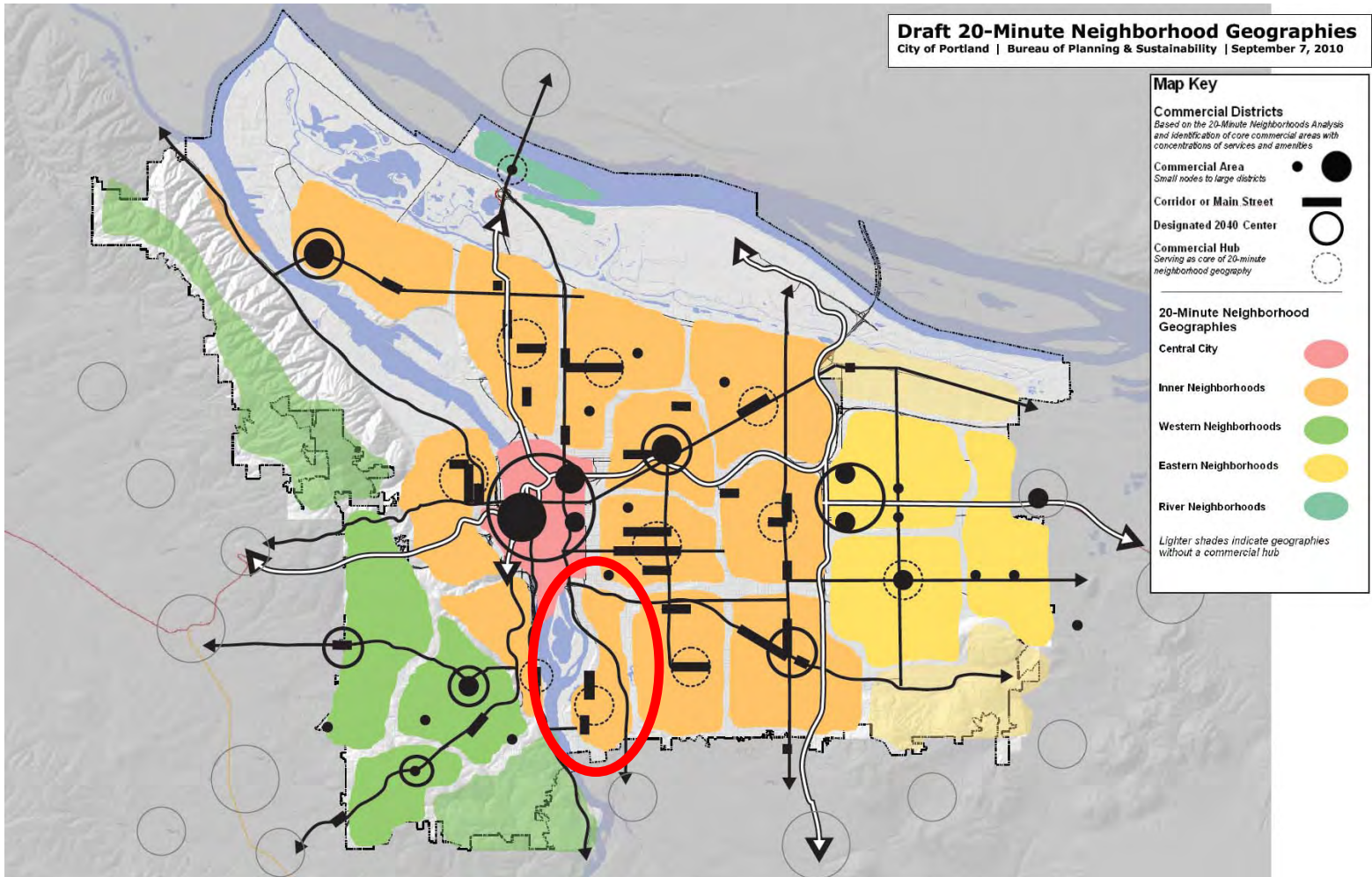
Average Annual Wages



Sellwood-Moreland-Brooklyn Analysis Area

Including the Sellwood-Moreland and Brooklyn neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Sellwood-Moreland-Brooklyn Analysis Area

Services and Amenities

Population: 15,300 people (7,400 households)
Land Area: 2.9 square miles (5,400 people per sq. mile)

Commercial Districts

The area's largest concentrations of commercial services are located along SE 13th (once known as "Antique Row") and in the Westmoreland shopping area at SE Milwaukie and SE Bybee. Other clusters of commercial services are located along other portions of SE Milwaukie, including the Brooklyn commercial district at SE Milwaukie and SE Powell, and on SE 17th near SE Tacoma.

Grocery stores: 2

Community Amenities

Community Centers: 1 (Sellwood Community Center)

Libraries: 1 (Sellwood-Moreland Library)

Parks and Open Spaces: 309 acres - including Brooklyn, Powell, Sellwood, Sellwood Riverfront, Johnson Creek and Westmoreland parks, and the Oaks Bottom Wildlife Refuge.

Tree Canopy Coverage: 23%

Public Schools: 3 K-8 schools (Llewellyn and Winterhaven elementary schools, Sellwood Middle School)

Colleges (campus): None

Hospitals: None

Farmers Markets: 1 (Moreland Farmers Market)

Transit Centers/Stations: None

Walkable Access Score: 55 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

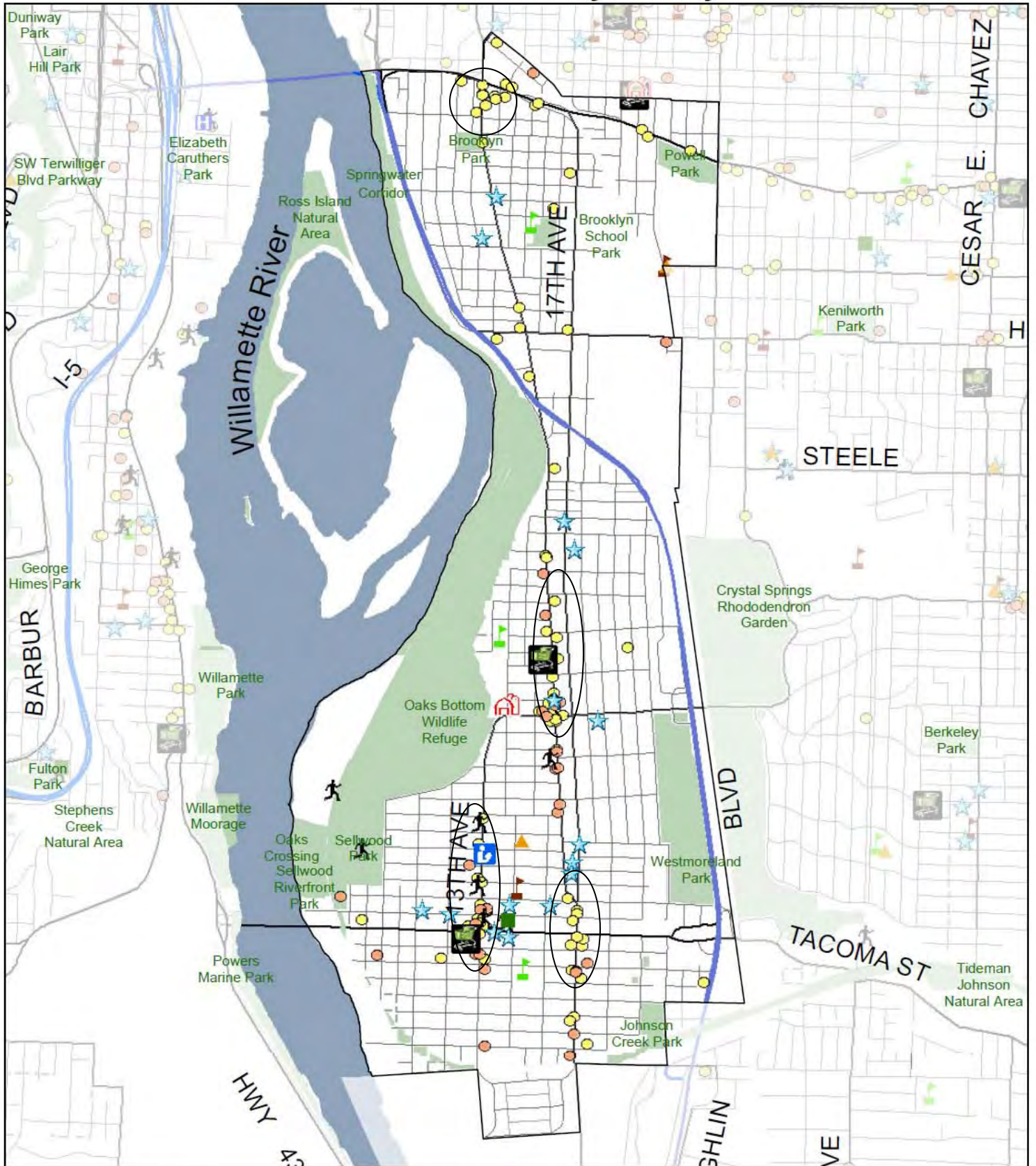
Within 1/2 mile of a park:	95%
Within 1/2 mile of a public elementary school:	30%
Within 3 miles of a full-service community center:	0%
Within 1/2 mile of a full-service grocery store:	46%
Within 1/4 mile of a frequent service transit stop:	17%

Neighborhood and Business Associations

Neighborhood Associations: Sellwood-Moreland, Brooklyn

Business Associations: Sellwood/Westmoreland Business Alliance, Greater Brooklyn Business Association

Sellwood-Moreland-Brooklyn Analysis Area

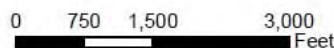


Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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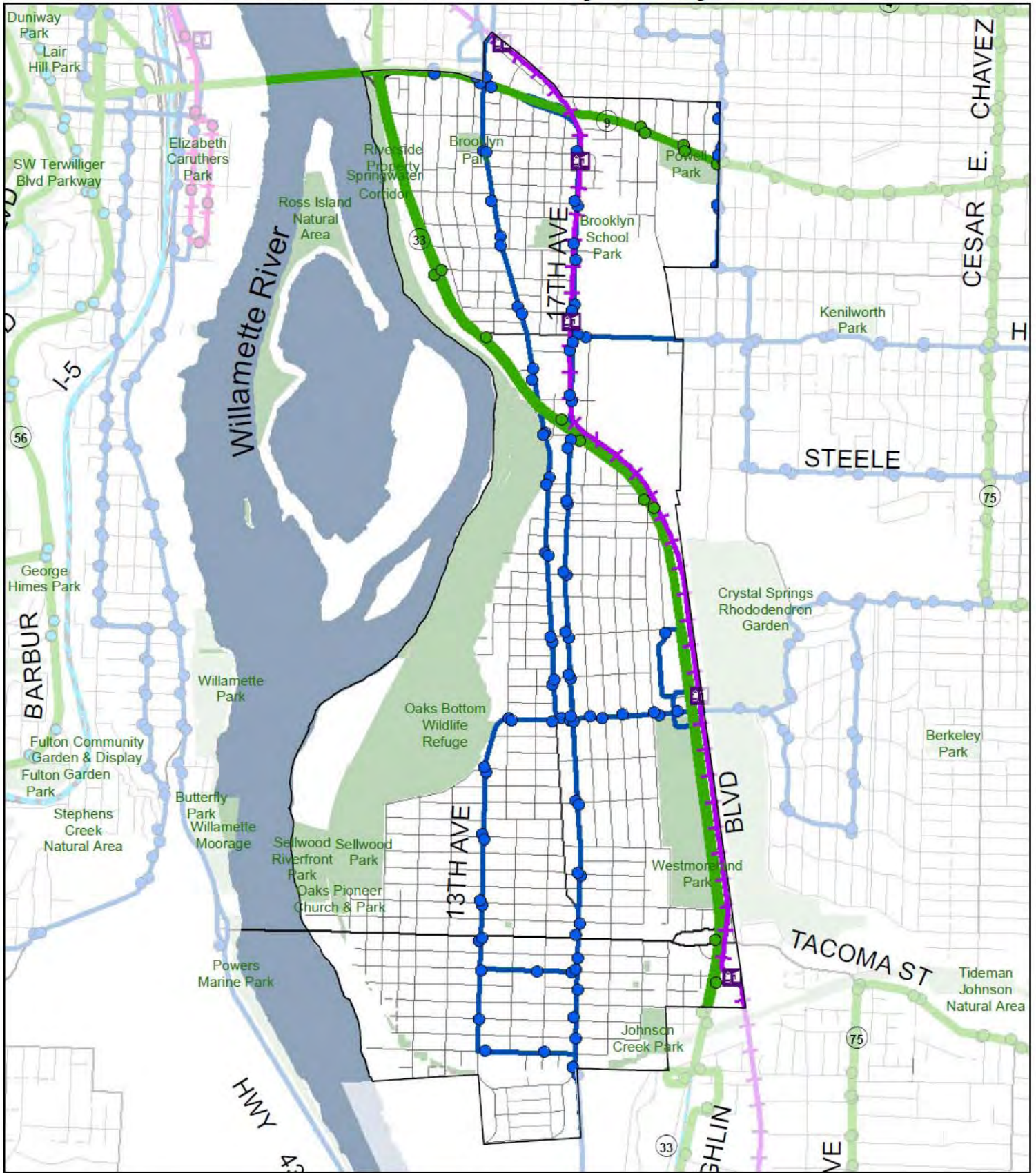


March 25, 2011

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commercial data from InfoUSA 2008

Sellwood-Moreland-Brooklyn Analysis Area



Transit Infrastructure

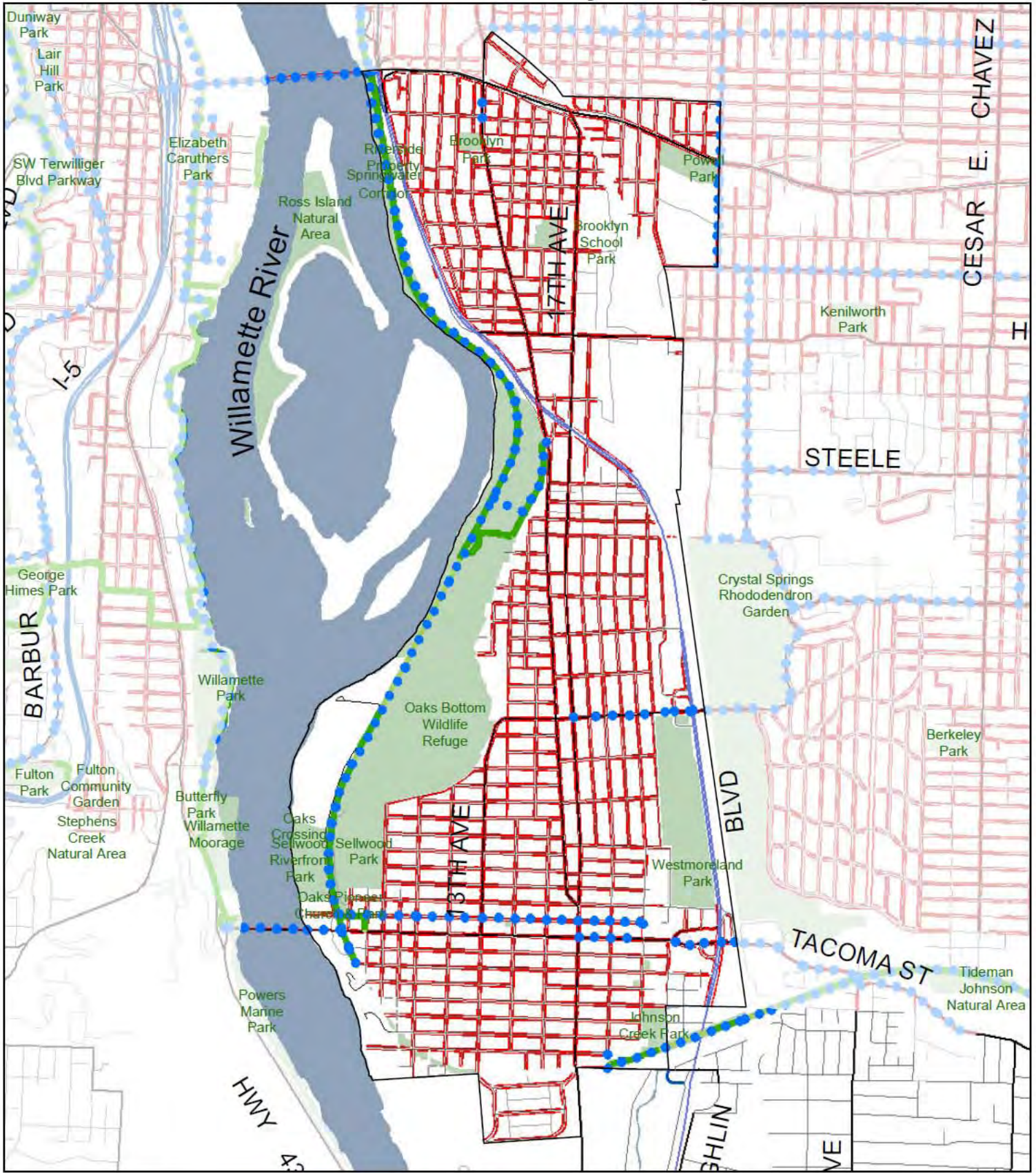
- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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Sellwood-Moreland-Brooklyn Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

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Sellwood-Moreland-Brooklyn Analysis Area

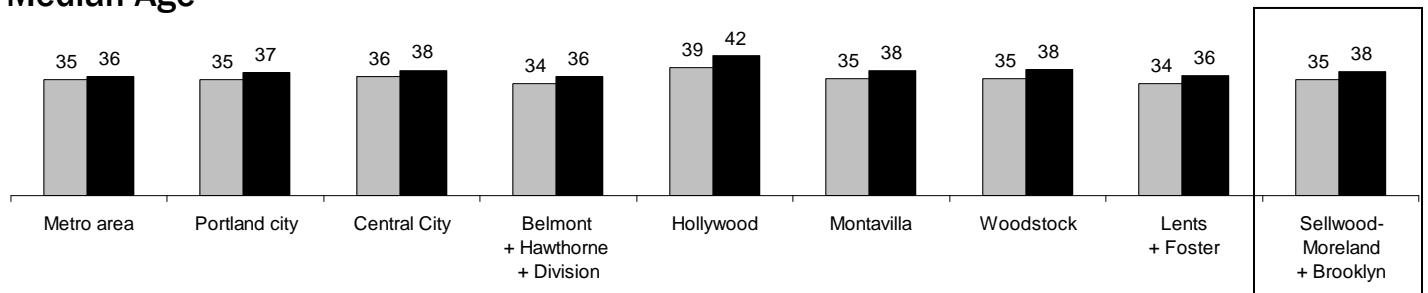
Demographics (2000 – 2010)

Population

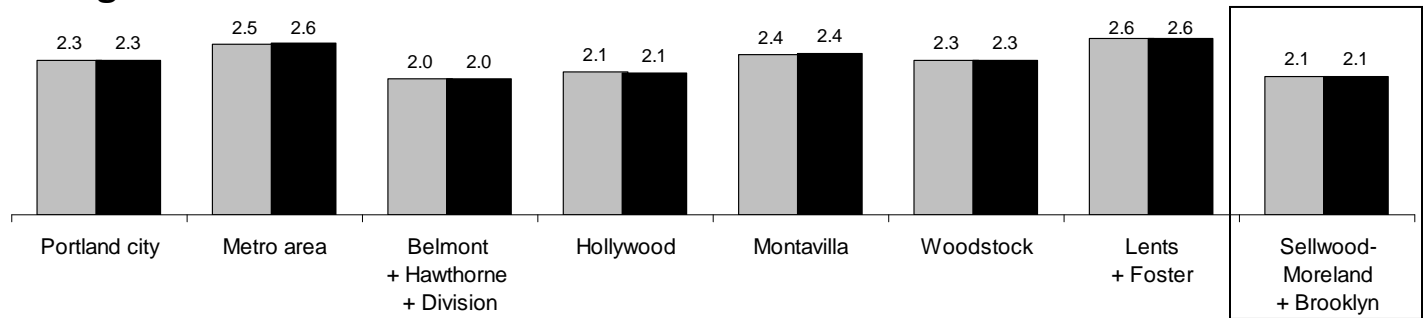
	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	2,226,000	589,000	30,931	36,907	30,699	31,581	31,266	43,891	15,349
2000	1,927,881	529,121	19,202	35,434	29,532	30,336	30,357	40,472	14,448
% change	12.9%	10.6%	61.1%	4.2%	4.0%	4.1%	3.0%	8.4%	6.2%

■ 2000 ■ 2010

Median Age

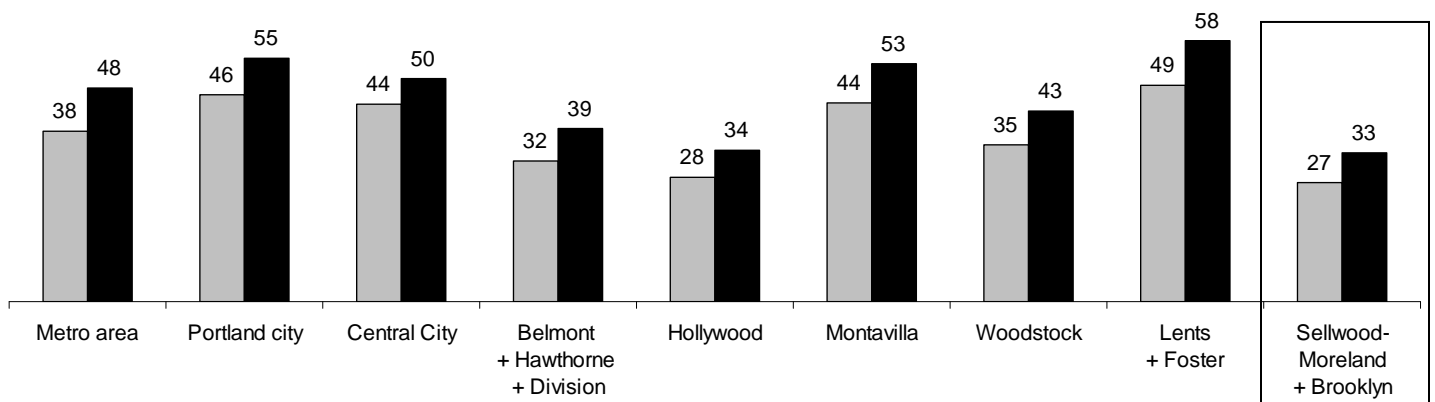


Average Household Size

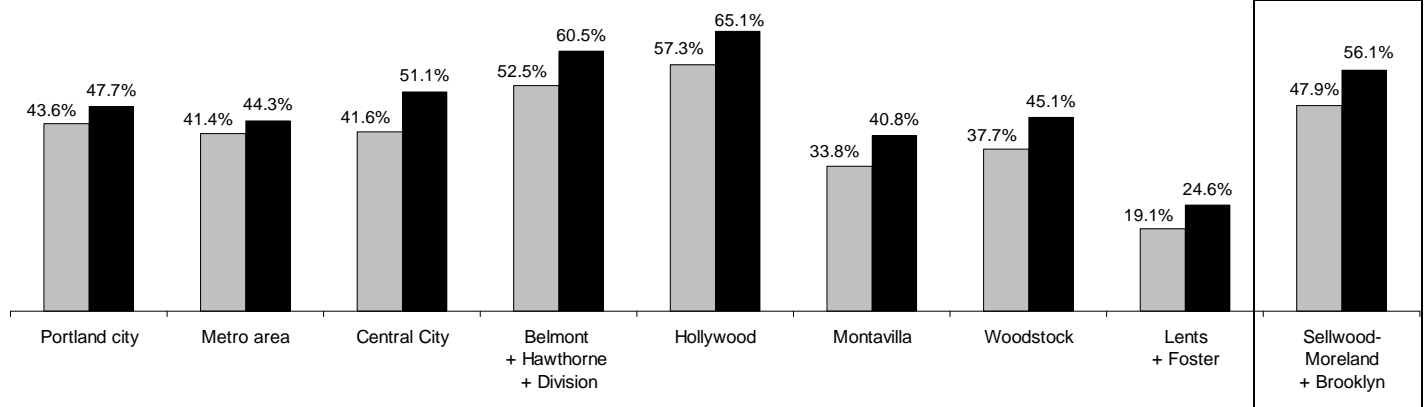


Diversity Index

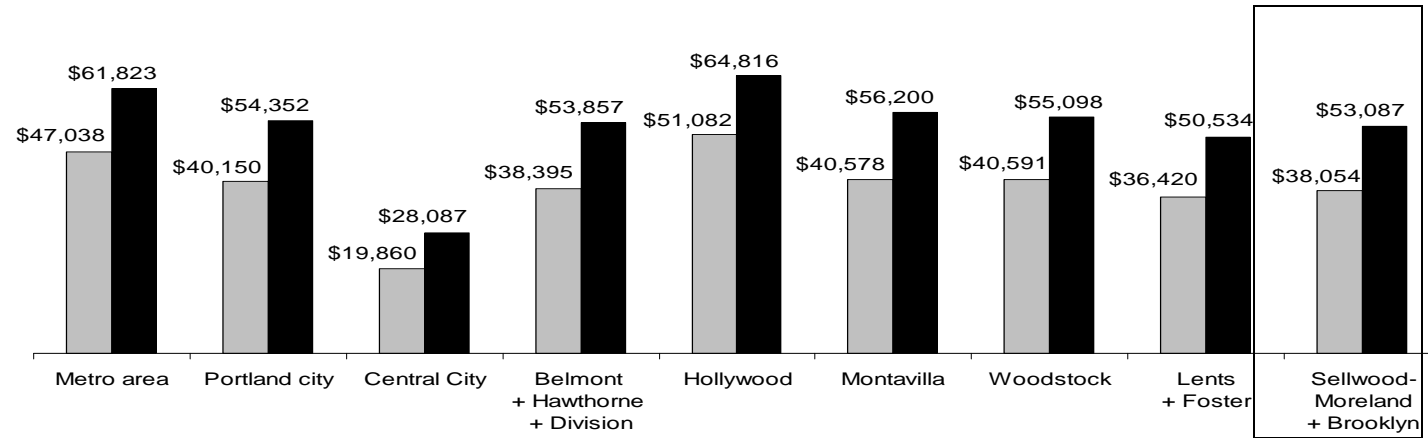
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



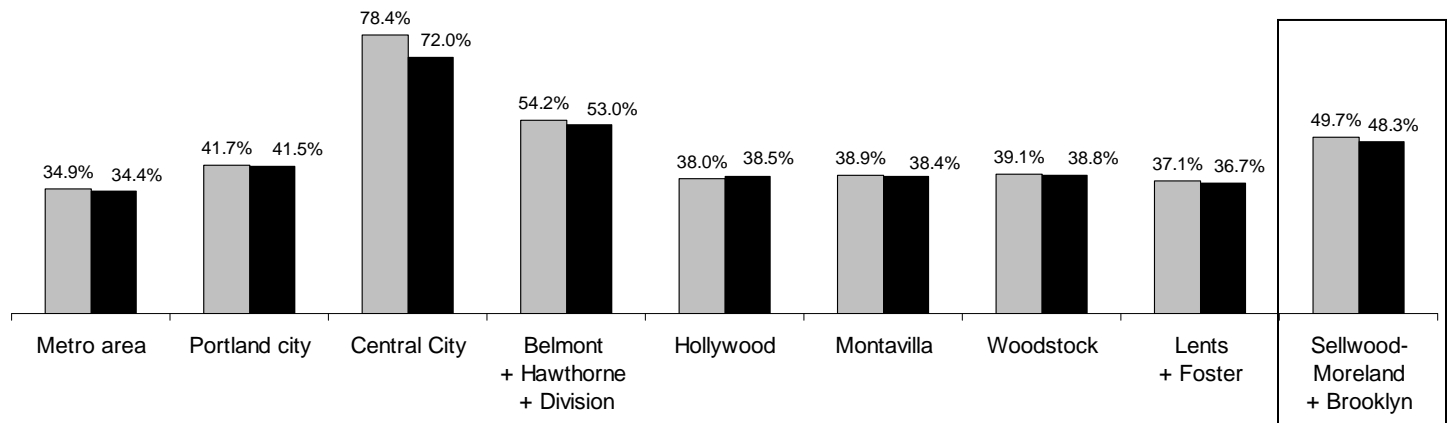
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Belmont Hawthorne Division	Hollywood	Montavilla	Woodstock	Lents Foster	Sellwood Moreland Brooklyn
2010	273,500	253,184	400,314	302,669	\$368,711	\$226,609	\$247,365	\$191,470	\$284,198
2000	168,347	154,721	250,566	181,054	\$223,268	\$141,422	\$152,397	\$120,837	\$170,779
% change	62.5%	63.6%	59.8%	67.2%	65.1%	60.2%	62.3%	58.5%	66.4%

Percent of Renters of Occupied Housing Units



Sellwood-Moreland-Brooklyn Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

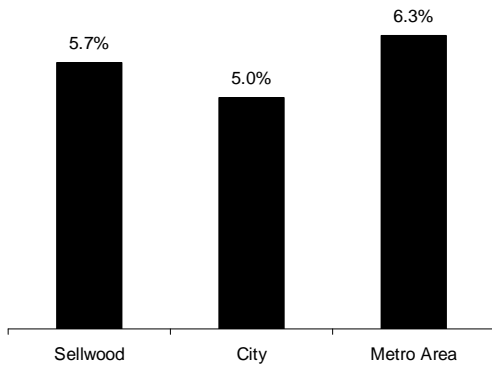
Sellwood	City	Metro Area
762,761	51,937,895	107,875,146

OFFICE SPACE

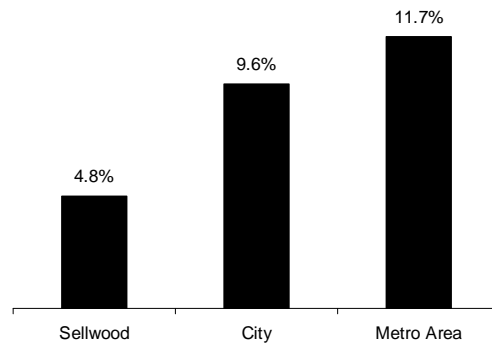
Square Feet

Sellwood	City	Metro Area
1,039,896	54,348,765	92,465,455

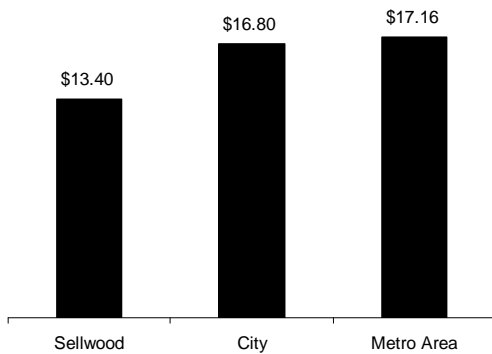
Retail Vacancy



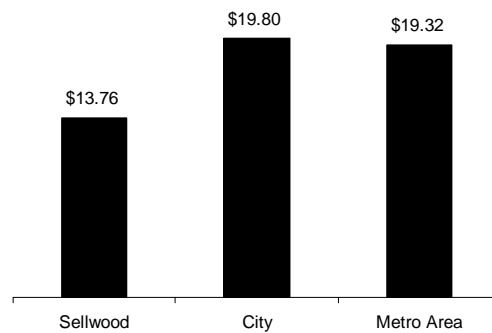
Office Vacancy



Retail Rents



Office Rents



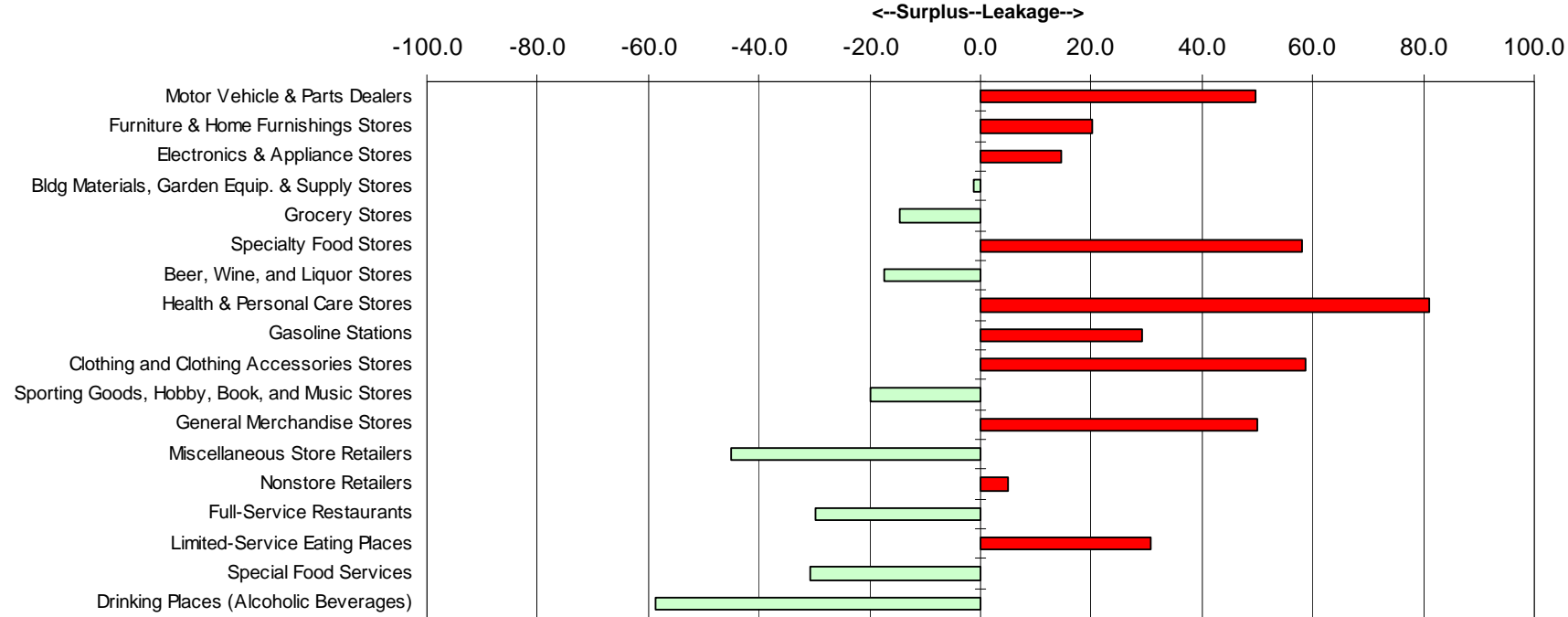
Sellwood-Moreland-Brooklyn Analysis Area

Retail Market Profile

Retail Gap = \$34 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$179,738,780	\$145,235,121	\$34,503,659	10.6	210
Total Retail Trade (NAICS 44-45)	\$153,231,787	\$106,744,661	\$46,487,126	17.9	137
Total Food & Drink (NAICS 722)	\$26,506,993	\$38,490,460	-\$11,983,467	-18.4	73

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Sellwood-Moreland-Brooklyn Analysis Area

Employment

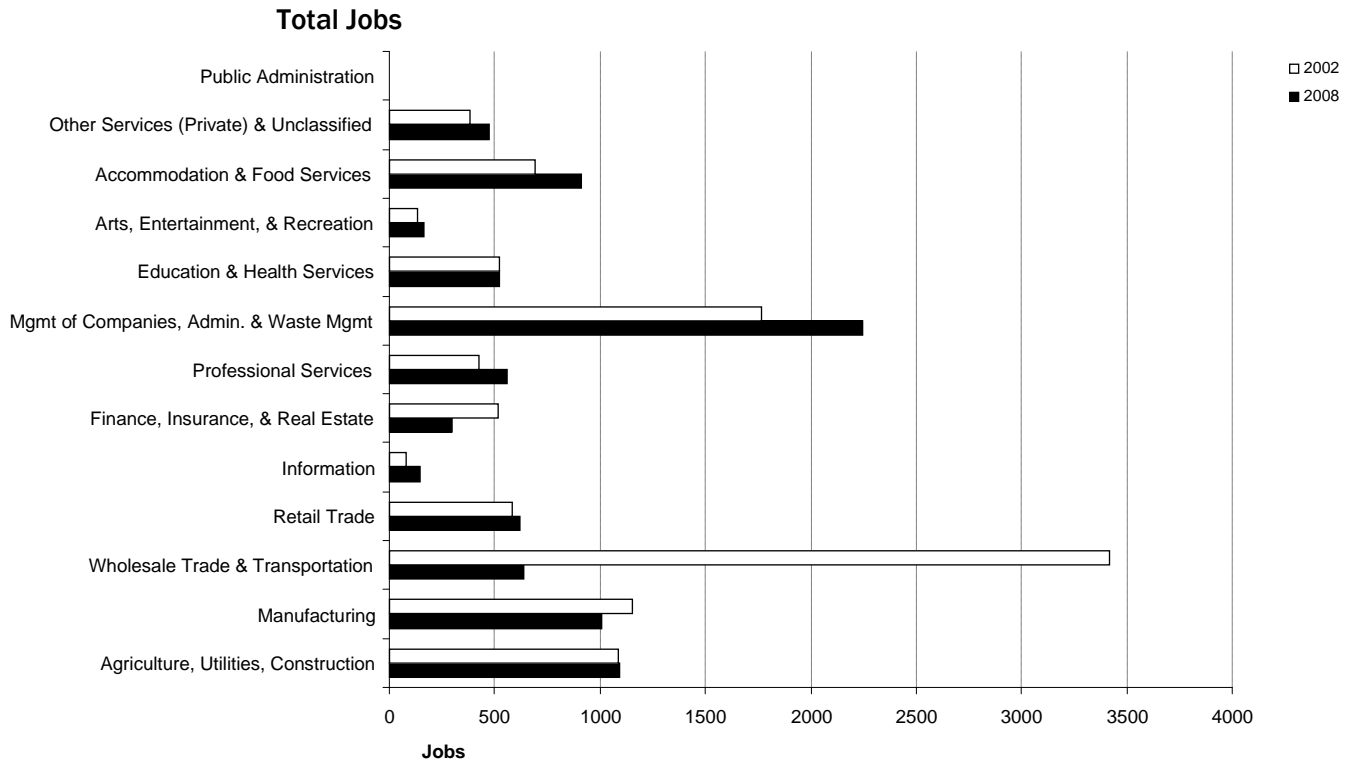
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

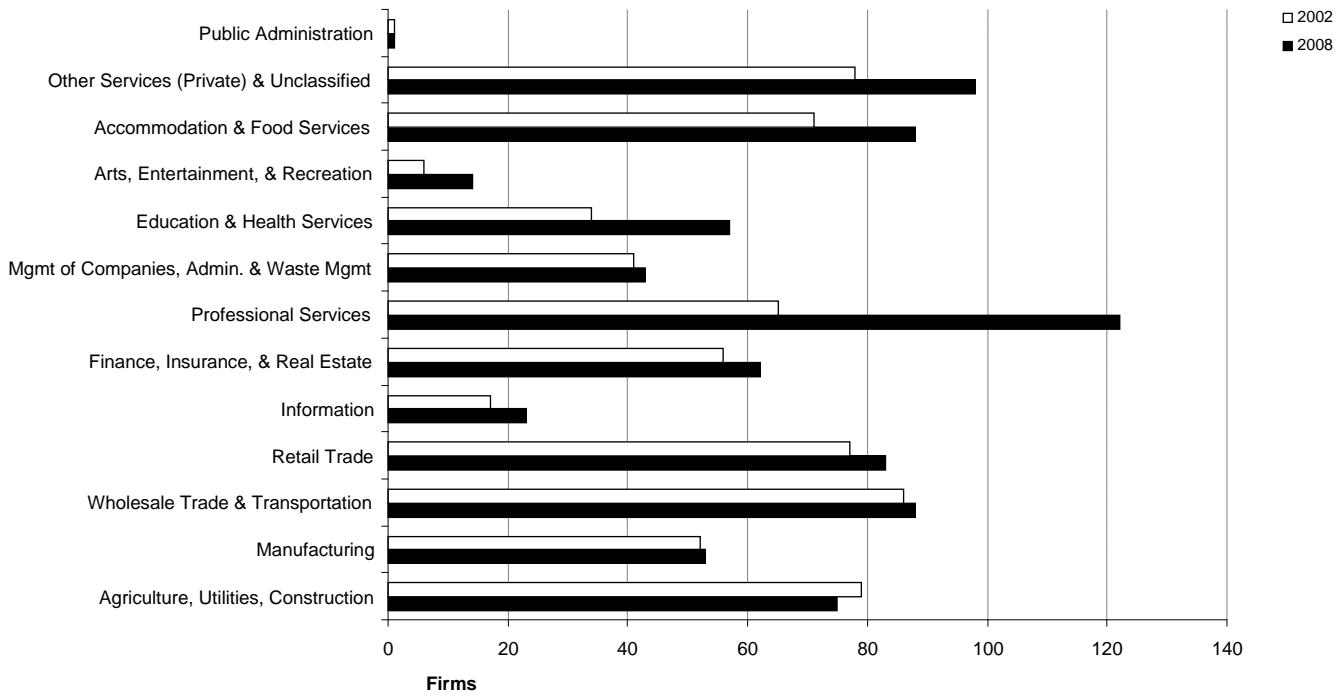
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

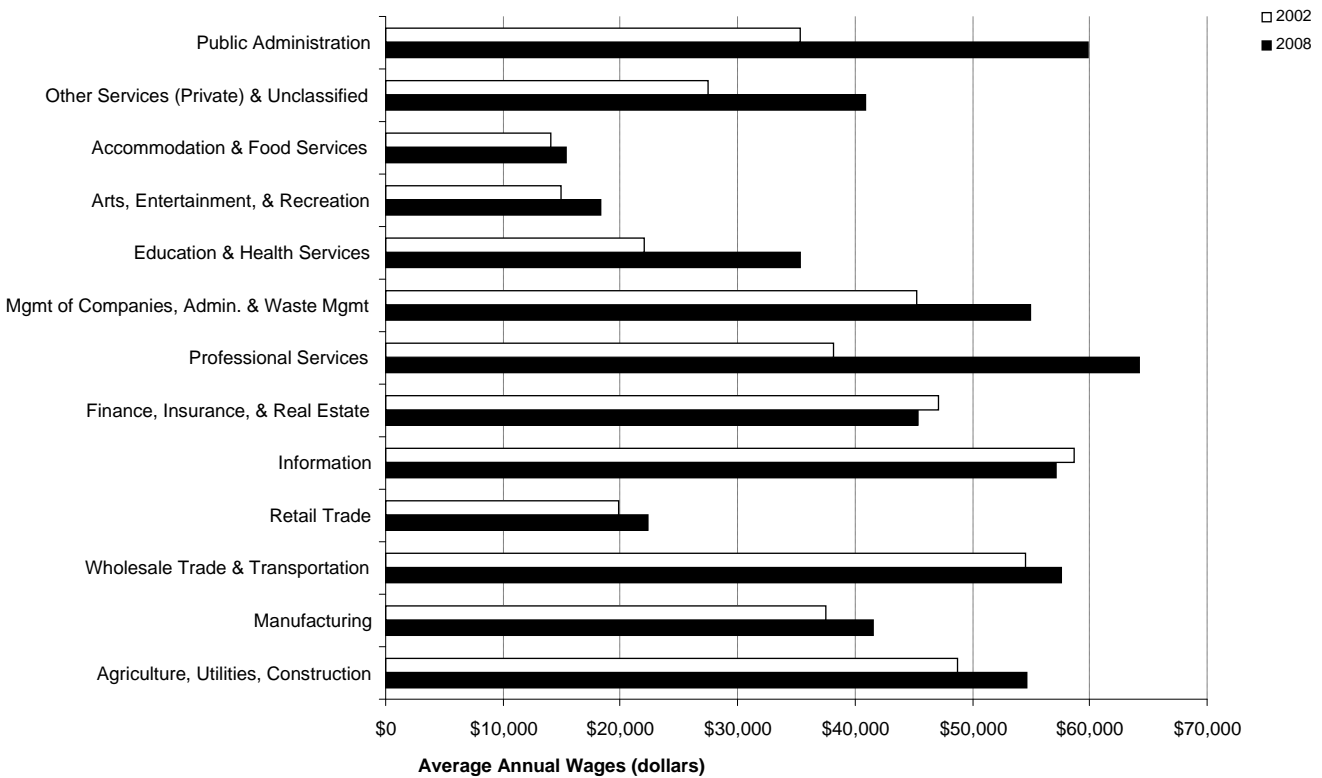
	2002	2008	change
Total Jobs	10,752	8,683	- 2,069
Total Firms	663	807	+144
Average Annual Wages	\$43,653	\$45,759	+2,106



Total Firms



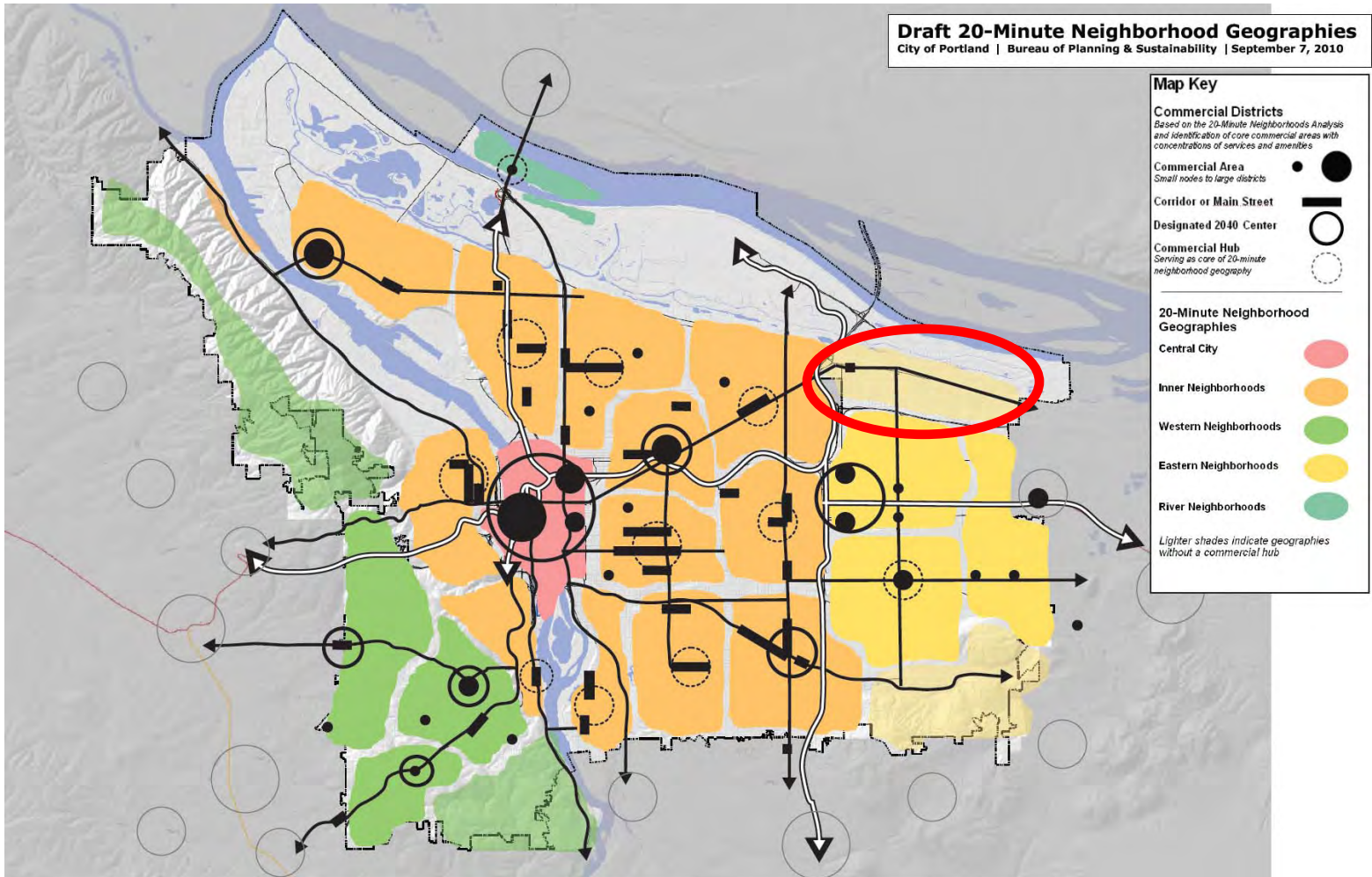
Average Annual Wages



Parkrose-Argay Analysis Area

Including Parkrose, Argay, and part of the Wilkes neighborhood

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Parkrose-Argay Analysis Area

Services and Amenities

Population: 14,700 people (5,400 households)
Land Area: 3.7 sq. miles (4,000 people per sq. mile)

Commercial Districts

The area's largest concentration of commercial services is located along NE Sandy, between 102nd and 122nd Avenues. There are smaller concentrations of commercial services on 122nd Avenue, and other commercial services are located outside the analysis area around Airport Way.

Grocery stores: None

Community Amenities

Community Centers: None

Libraries: None

Parks and Open Spaces: 89 acres – including Argay Park, Wilkes Park, and the Columbia Slough Natural Area.

Tree Canopy Coverage: 17%

Public Schools: 1 high school (Parkrose)

3 K-8 schools (Prescott and Shaver elementary schools, Parkrose Middle School)

Colleges (campus): None

Hospitals: None

Farmers Markets: 1 (Parkrose Farmers Market)

Transit Centers/Stations: 1 (Parkrose/Sumner Transit Center – at western edge of analysis area)

Walkable Access Score: 32 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

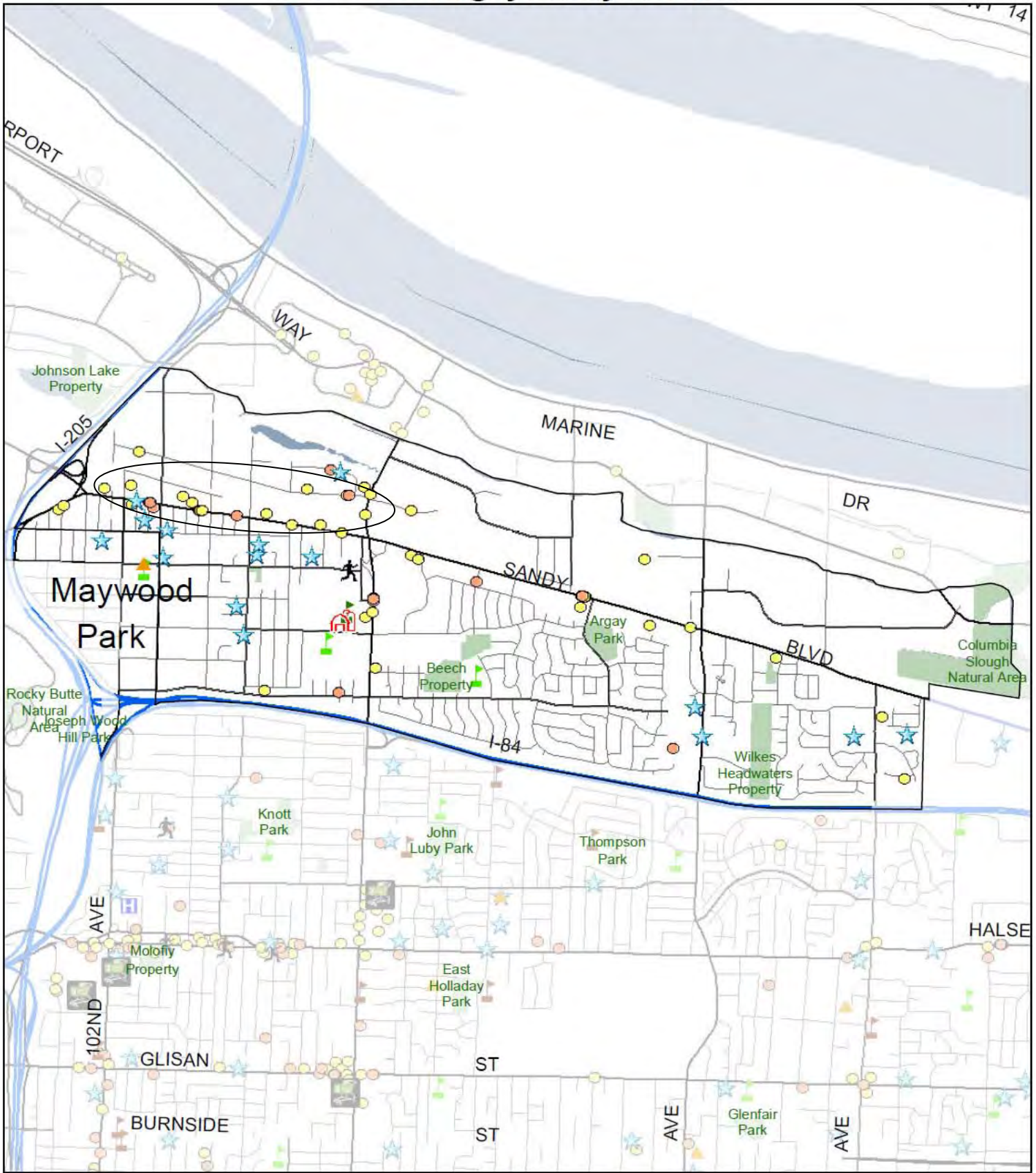
Within 1/2 mile of a park:	79%
Within 1/2 mile of a public elementary school:	24%
Within 3 miles of a full-service community center:	5%
Within 1/2 mile of a full-service grocery store:	0%
Within 1/4 mile of a frequent service transit stop:	1%

Neighborhood and Business Associations

Neighborhood Associations: Parkrose, Argay, and part of Wilkes

Business Associations: Parkrose Business Association

Parkrose-Argay Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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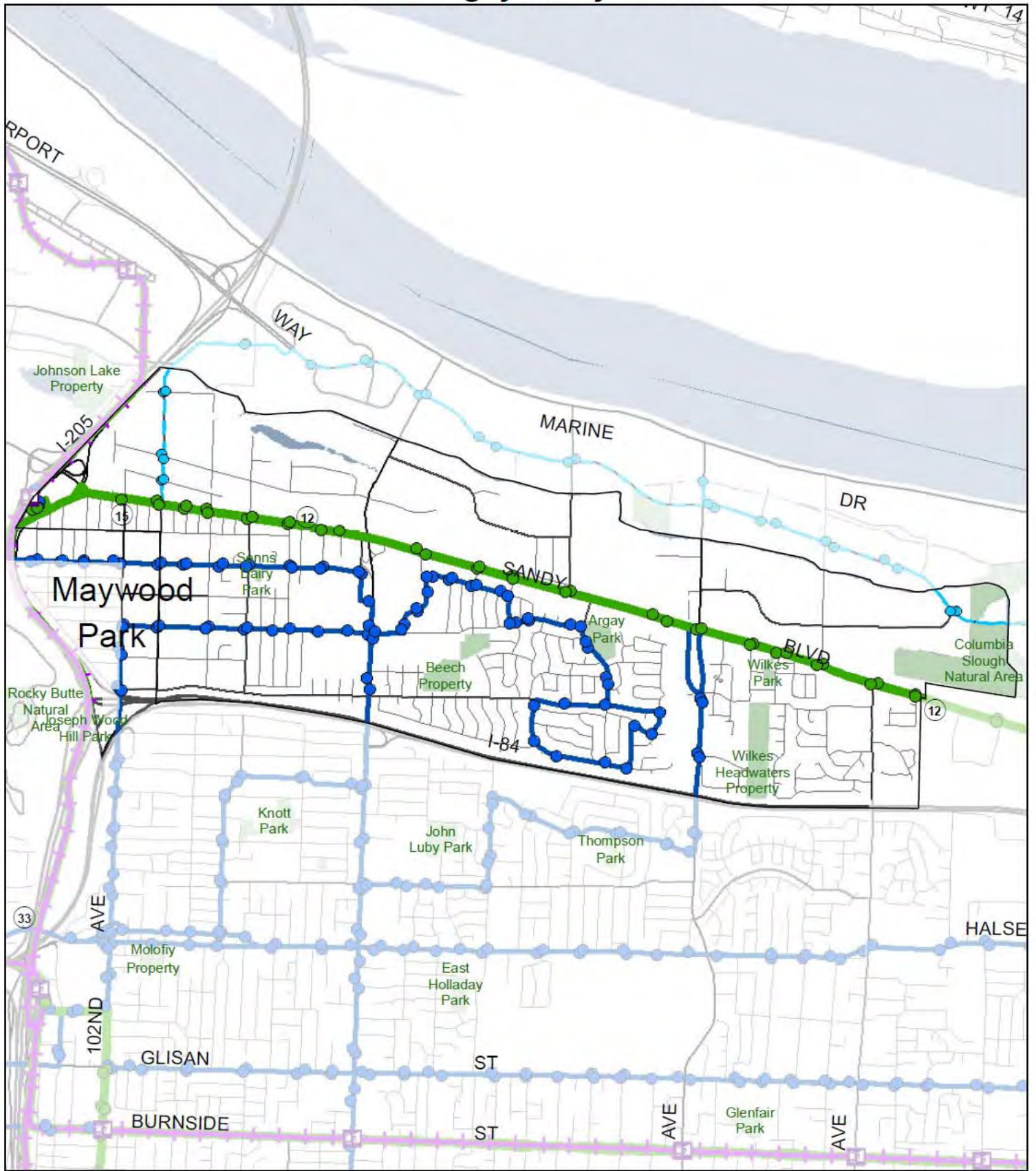
0 750 1,500 3,000
Feet

March 25, 2011

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commercial data from InfoUSA 2008

Parkrose-Argay Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



0 750 1,500 3,000 Feet



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May 12, 2011

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Parkrose-Argay Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



0 750 1,500 3,000 Feet



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March 25, 2011

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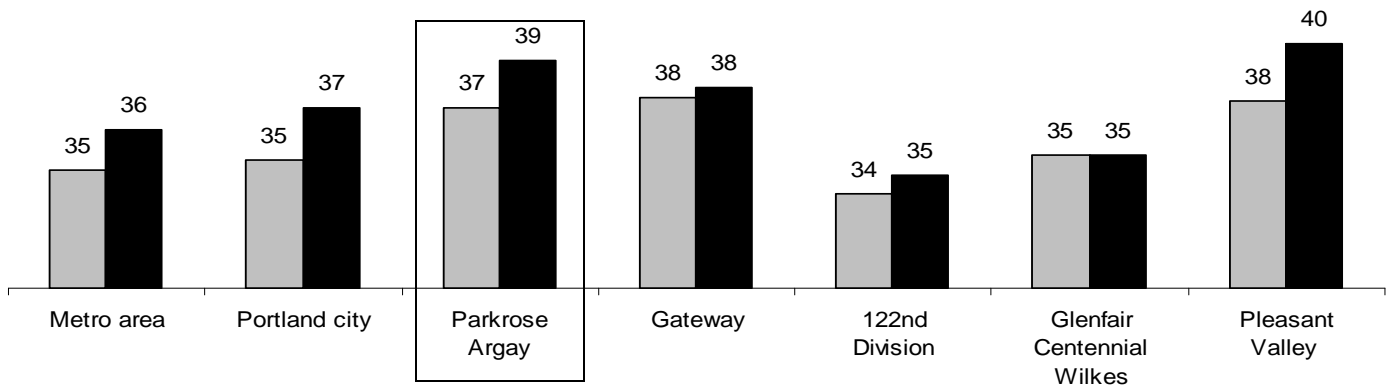
Parkrose-Argay Analysis Area Demographics (2000 – 2010)

Population

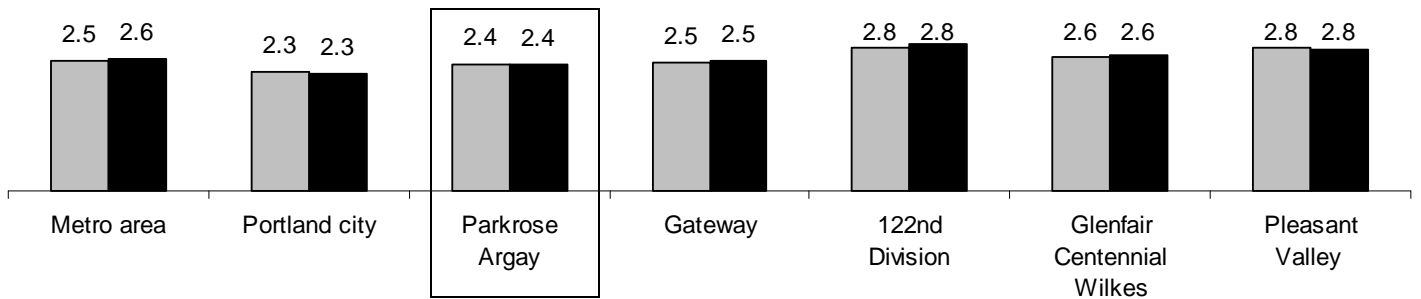
	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	2,226,000	589,000	30,931	14,703	28,498	40,102	31,343	11,809
2000	1,927,881	529,121	19,202	13,173	25,750	32,630	27,509	7,405
% change	12.9%	10.6%	61.1%	11.6%	10.7%	22.9%	13.9%	59.5%

■ 2000 ■ 2010

Median Age

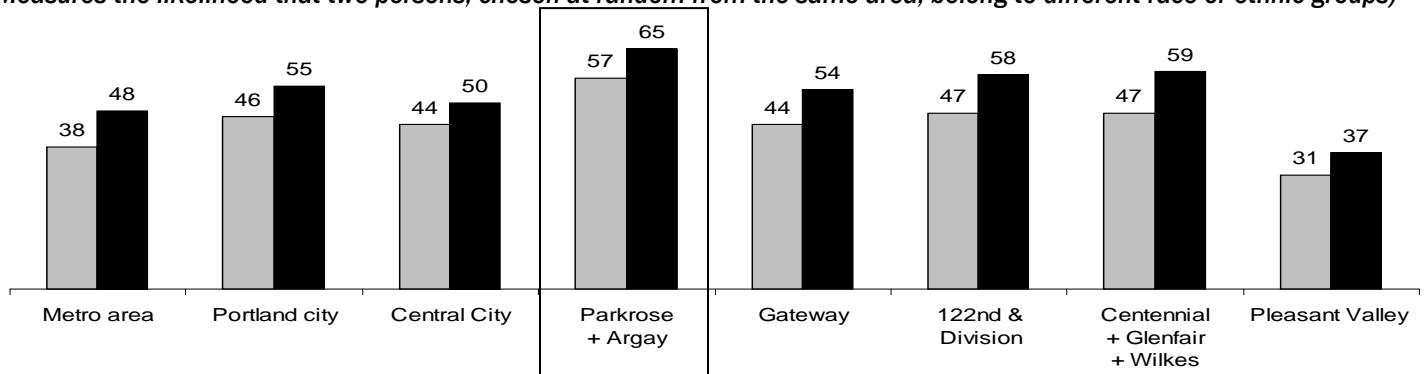


Average Household Size

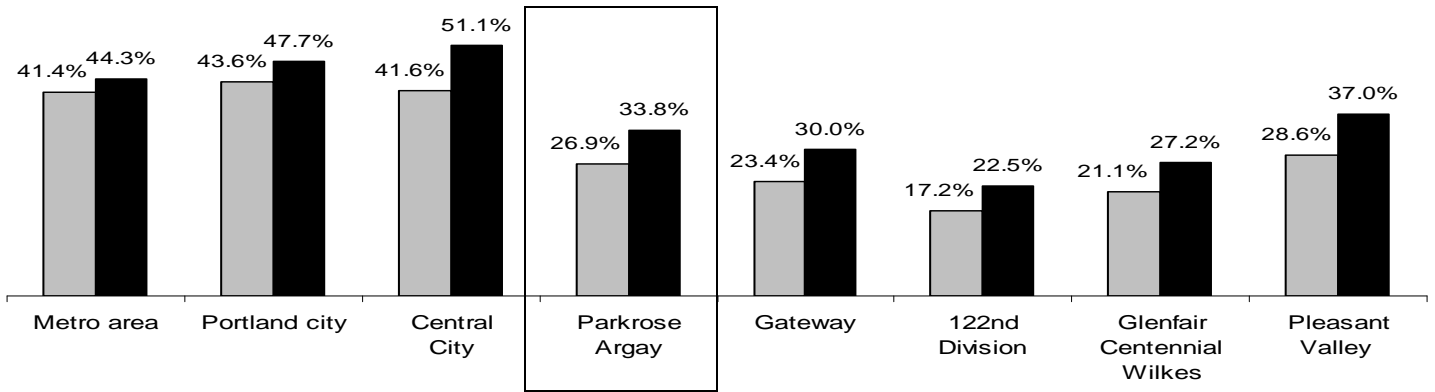


Diversity Index

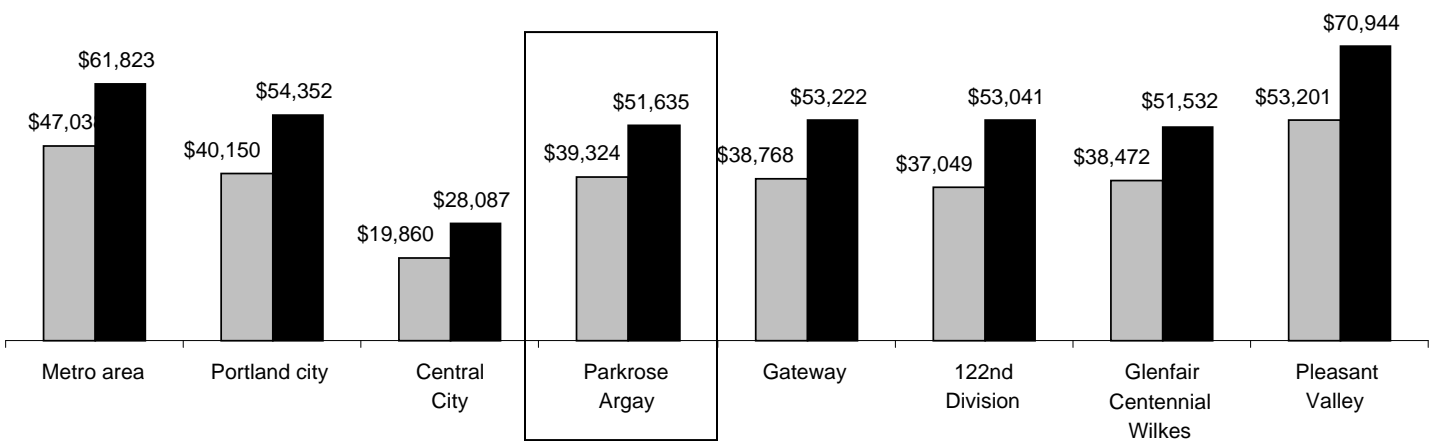
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



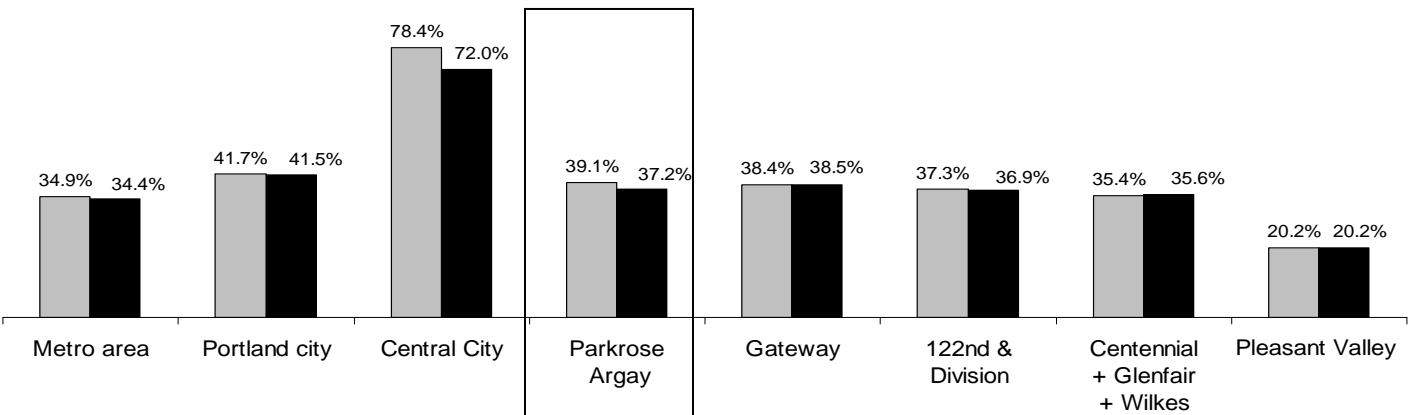
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	273,500	253,184	400,314	\$270,425	\$228,955	208,480	229,875	\$303,102
2000	168,347	154,721	250,566	\$163,771	\$143,033	133,205	143,259	\$177,778
% change	62.5%	63.6%	59.8%	65.1%	60.1%	56.5%	60.5%	70.5%

Percent of Renters of Occupied Housing Units



Parkrose-Argay Analysis Area

Commercial Real Estate Indicators

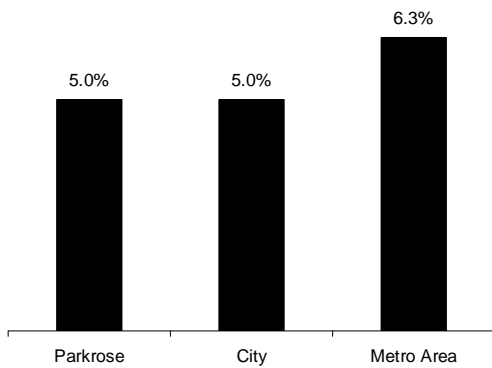
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

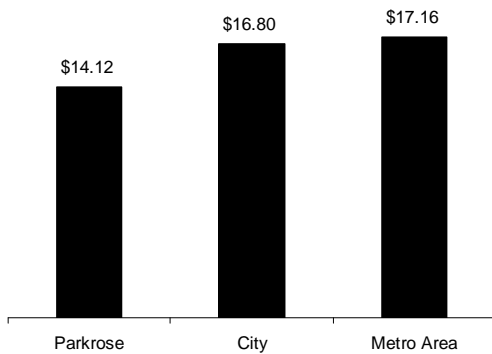
Square Feet

Parkrose	City	Metro Area
762,761	51,937,895	107,875,146

Retail Vacancy



Retail Rents

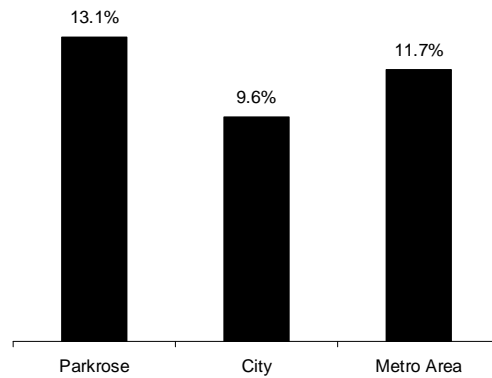


OFFICE SPACE

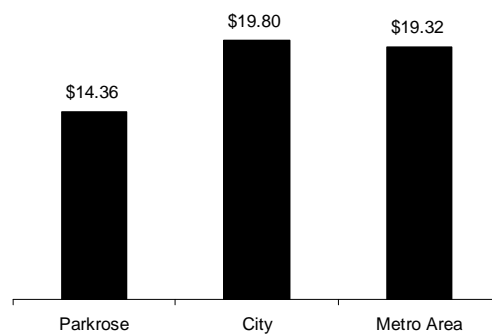
Square Feet

Parkrose	City	Metro Area
1,039,896	54,348,765	92,465,455

Office Vacancy



Office Rents



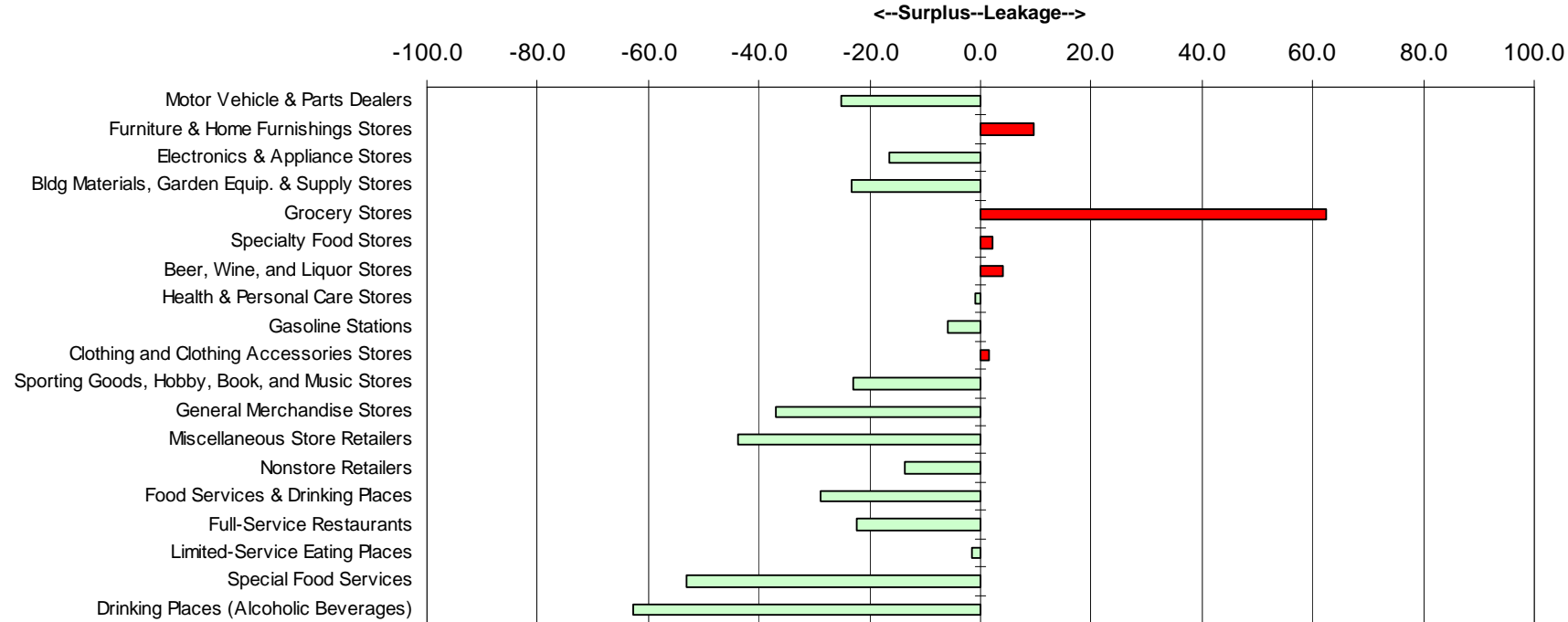
Parkrose-Argay Analysis Area

Retail Market Profile

Retail Gap = \$39 million (surplus)

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$137,283,133	\$186,249,340	-\$48,966,207	-15.1	156
Total Retail Trade (NAICS 44-45)	\$117,419,312	\$150,263,819	-\$32,844,507	-12.3	108
Total Food & Drink (NAICS 722)	\$19,863,821	\$35,985,521	-\$16,121,700	-28.9	48

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Parkrose-Argay Analysis Area

Employment

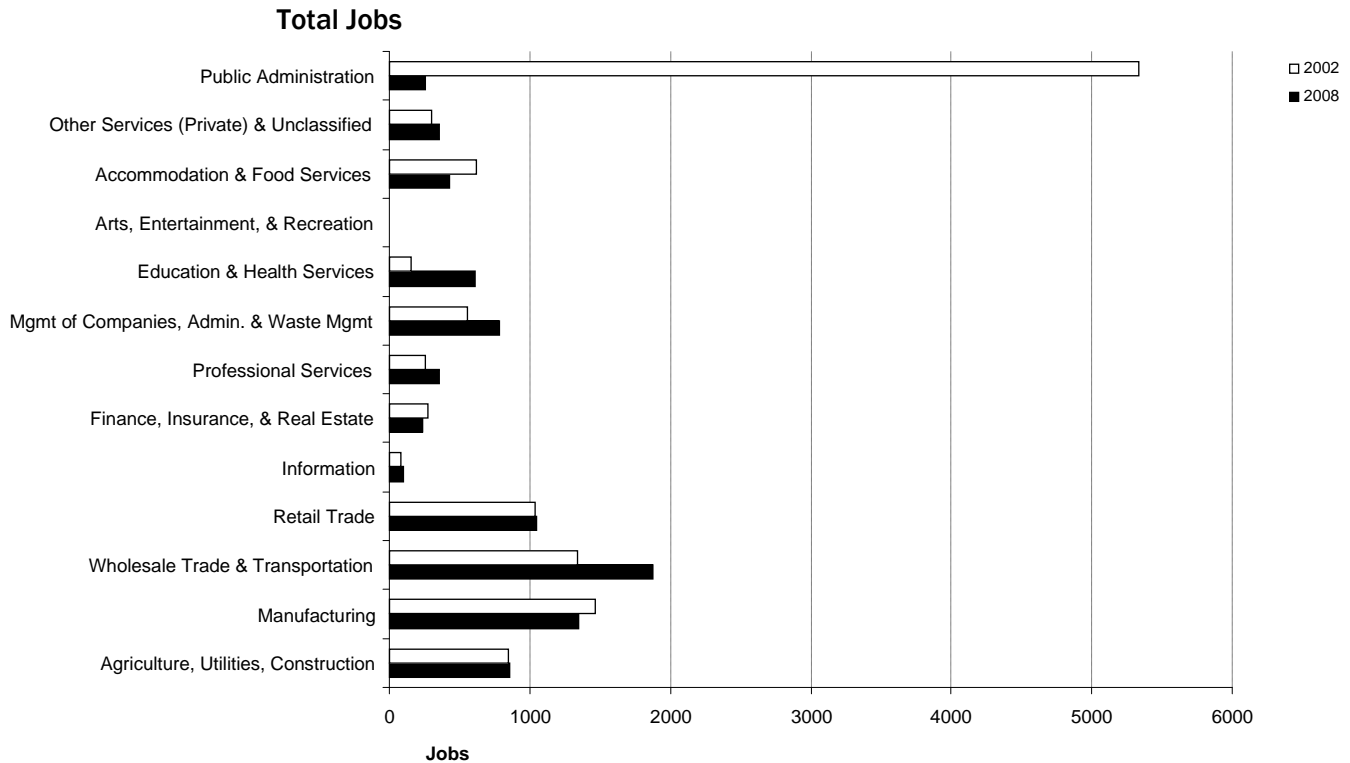
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

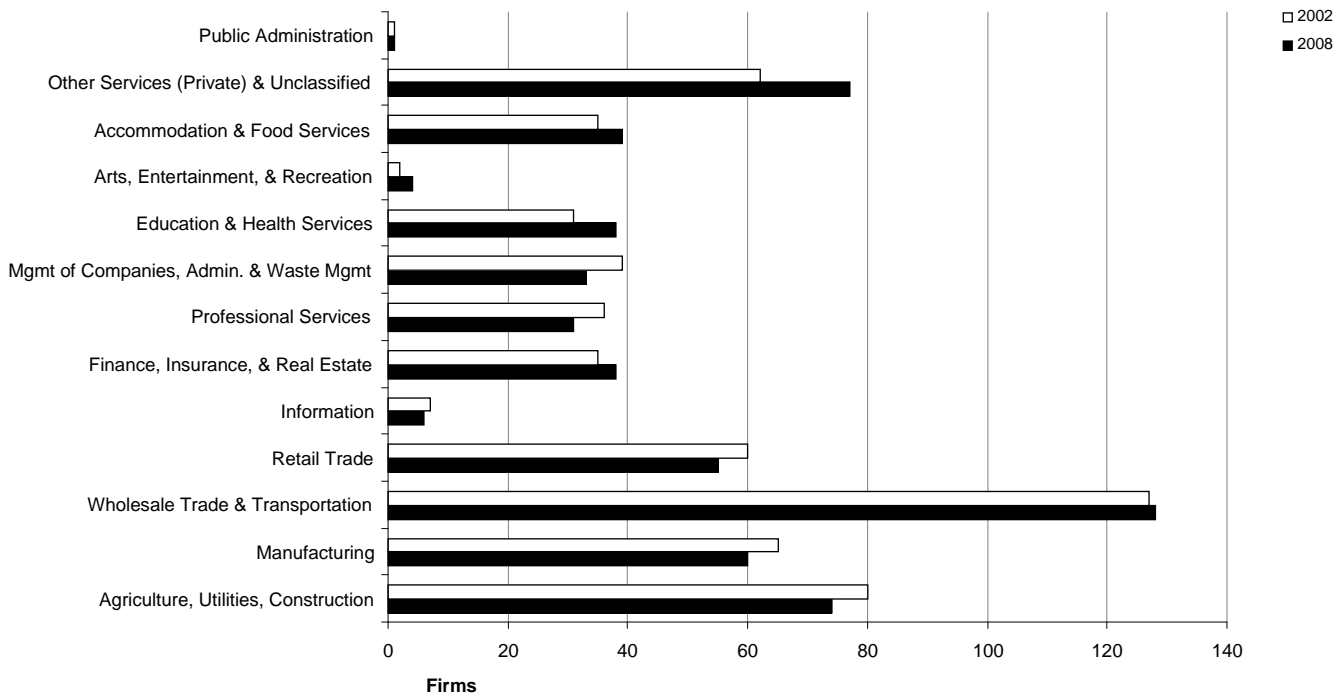
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

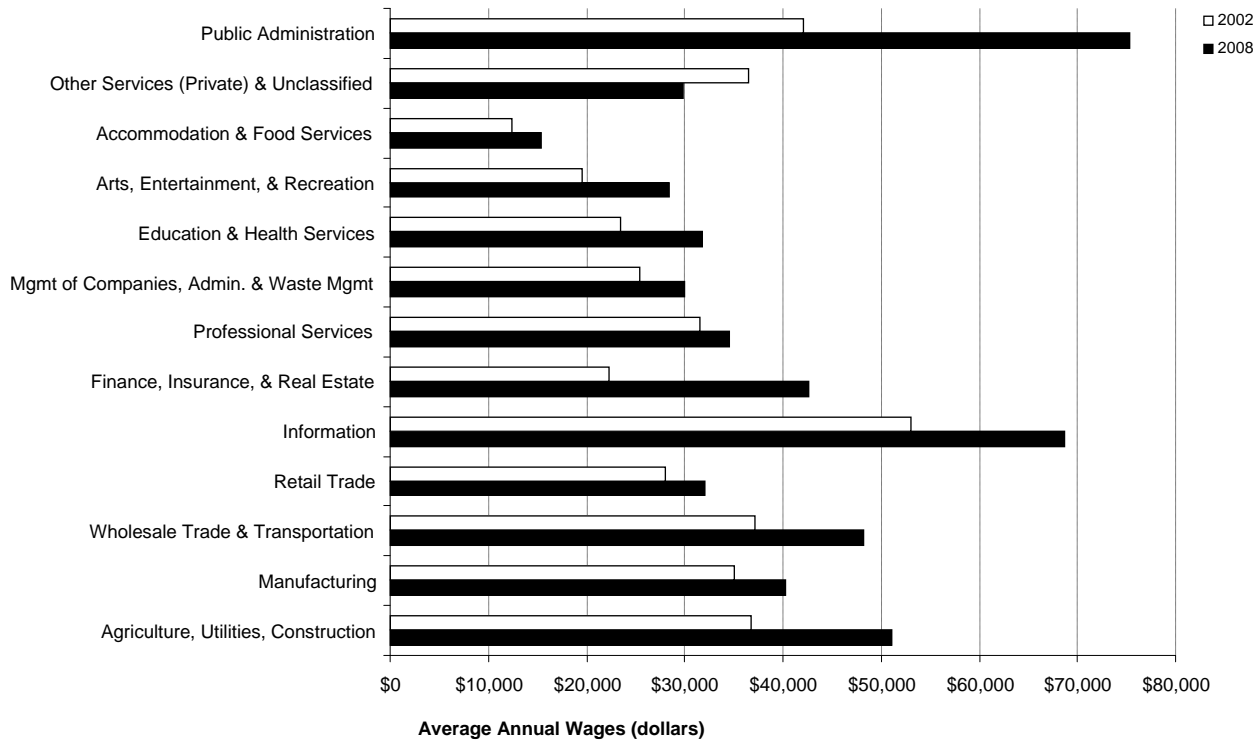
	2002	2008	change
Total Jobs	12,280	8,251	- 4,029
Total Firms	580	584	+4
Average Annual Wages	\$35,902	\$40,255	+4,323



Total Firms



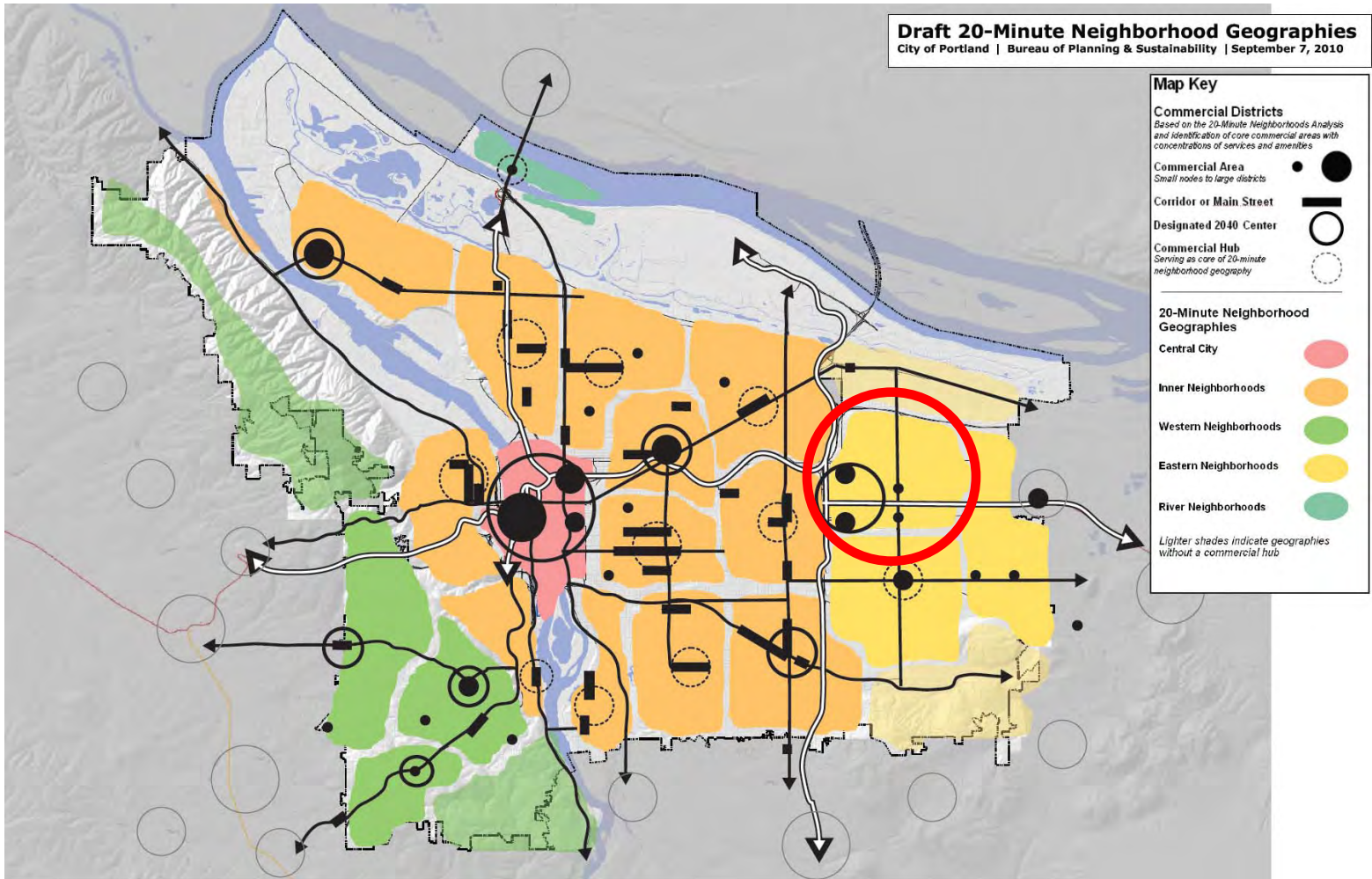
Average Annual Wages



Gateway Analysis Area

Including Hazelwood, Parkrose Heights, Russell, and part of the Mill Park neighborhood

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Gateway Analysis Area

Services and Amenities

Population: 28,500 people (11,000 households)
Land Area: 5.1 sq. miles (5,600 people per sq. mile)

Commercial Districts

Locations with major concentrations of commercial services include the area around and east of NE Halsey and 102nd Avenue (where the Gateway Shopping Center is located), SE Washington and SE Stark near 102nd Avenue (including Mall 205), and around NE Glisan and 122nd Avenue. There are smaller concentrations of commercial services at 122nd and NE Halsey, and at 122nd and NE Stark.

Grocery stores: 4

Community Amenities

Community Centers: 1 (East Portland Community Center & Pool – full service)

Libraries: 1 (Midland Library)

Parks and Open Spaces: 296 acres – including Floyd Light, John Luby, East Holladay, Thompson, and Ventura parks.

Tree Canopy Coverage: 22%

Public Schools: 1 high school (David Douglas)

5 K-8 schools (Menlo Park, Ventura Park, Sacramento, and Russell Academy elementary schools, Floyd Light Middle School)

Colleges (campus): 1 specialized (Oregon College of Oriental Medicine)

Hospitals: 1 (Adventist Medical Center – at southwest edge of analysis area)

Farmers Markets: None

Transit Centers/Stations: 4 (Gateway Transit Center, and the E. 102nd, E. 122nd, and SE Main light rail stations)

Walkable Access Score: 48 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

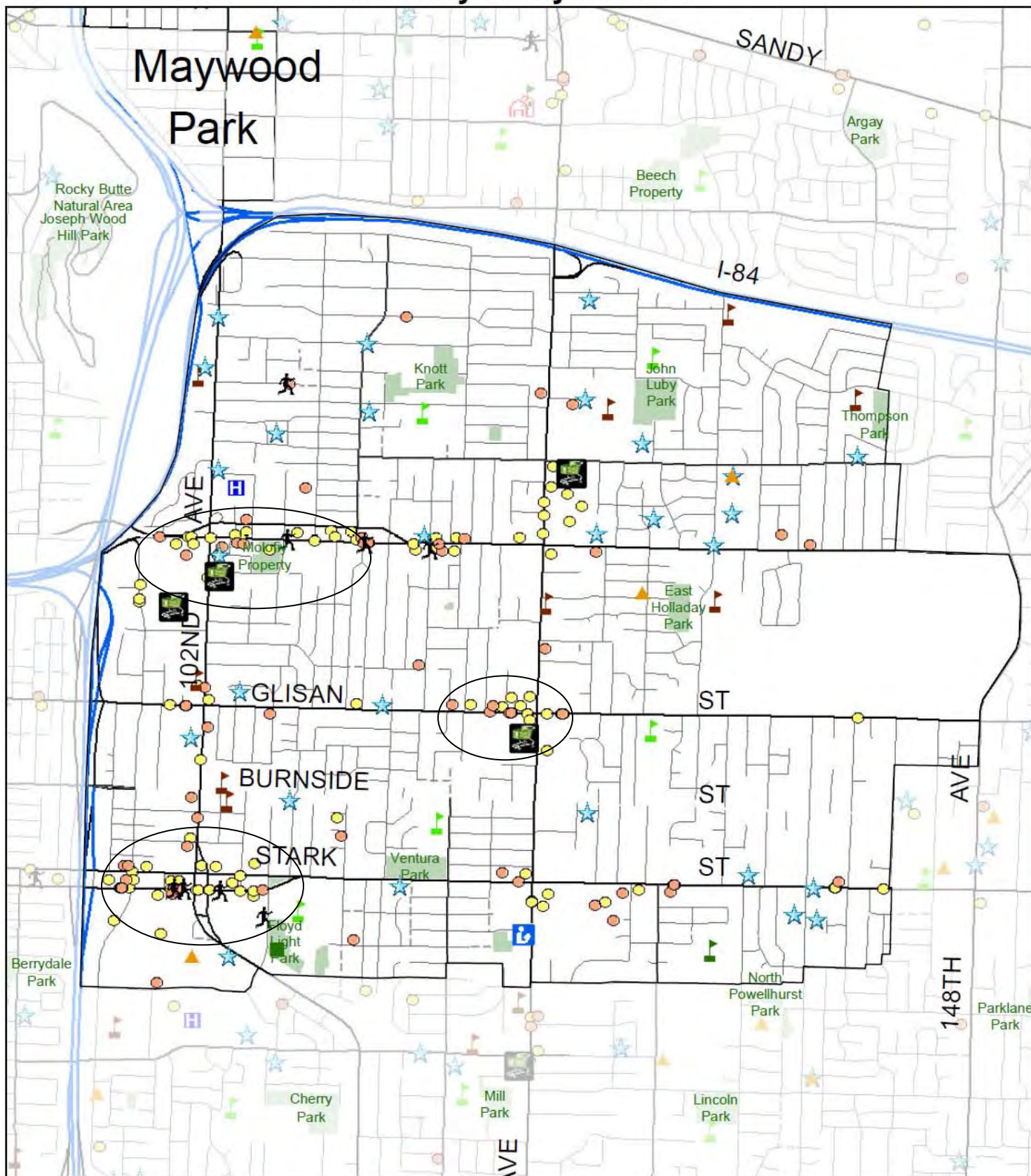
Within 1/2 mile of a park:	96%
Within 1/2 mile of a public elementary school:	22%
Within 3 miles of a full-service community center:	98%
Within 1/2 mile of a full-service grocery store:	31%
Within 1/4 mile of a frequent service transit stop:	12%

Neighborhood and Business Associations

Neighborhood Associations: Hazelwood, Parkrose Heights, Russell, and part of Mill Park

Business Associations: Gateway Area Business Association

Gateway Analysis Area



Services and Amenities

-  Type 1 Commercial
-  Type 2 Commercial
-  Fitness Centers
-  Grocery Stores
-  Places of Worship
-  Farmers Markets
-  Libraries
-  Community Centers
-  Public HS
-  Public K-8
-  Private Schools
-  Daycare Centers



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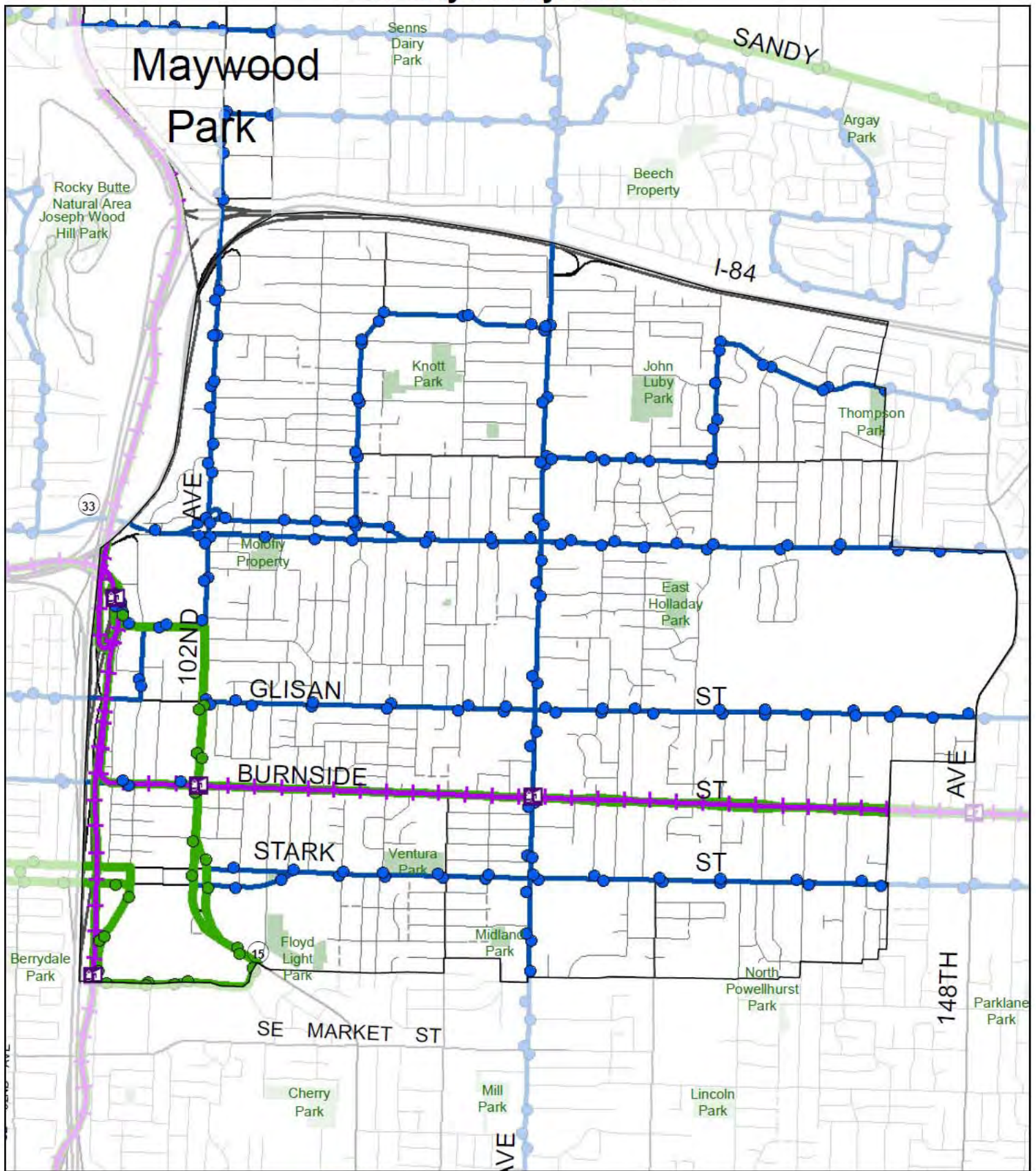


March 25, 2011

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commercial data from InfoUSA 2008

Gateway Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



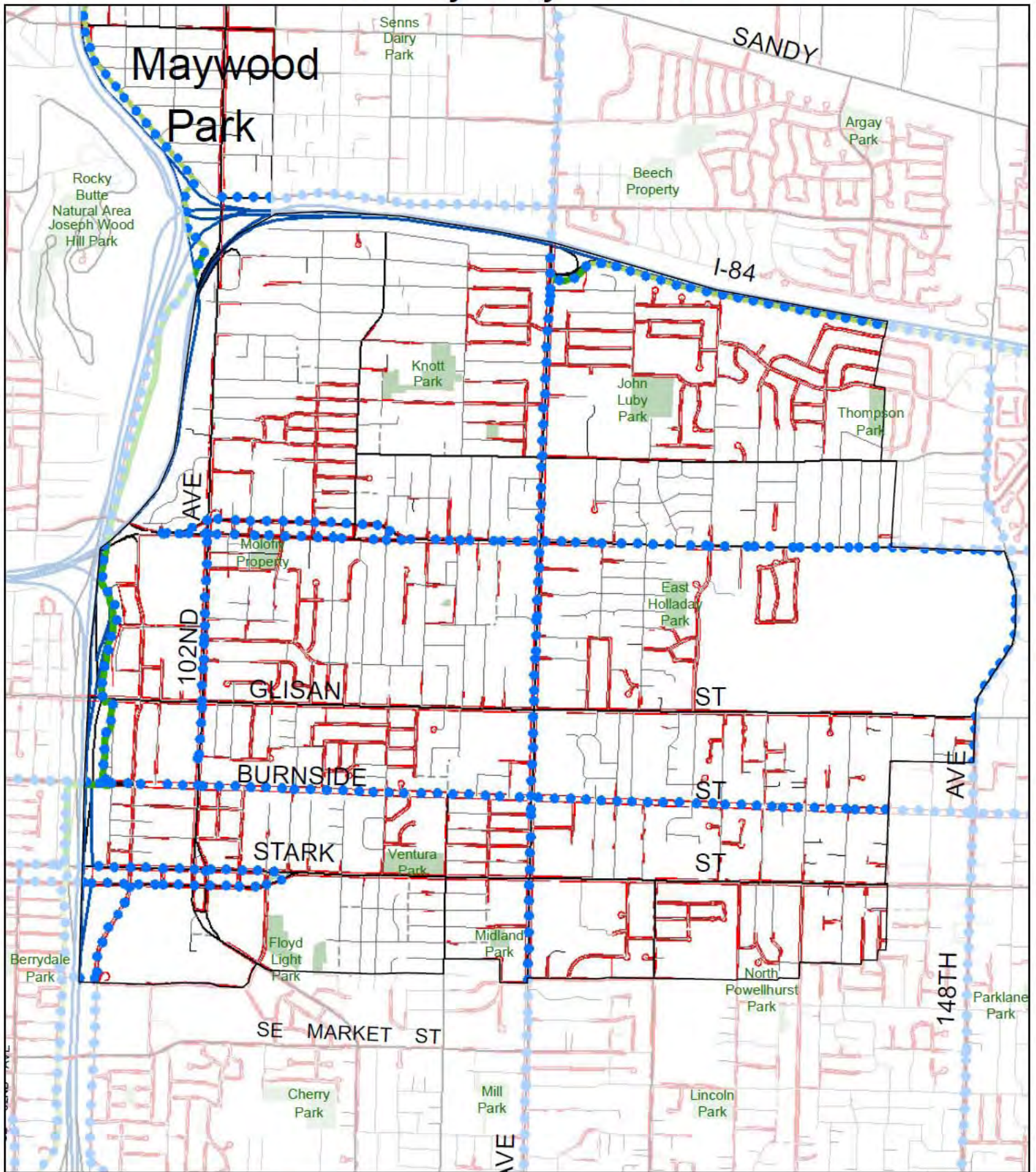
City of Portland Bureau of Planning & Sustainability
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0 750 1,500 3,000 Feet

May 12, 2011

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Gateway Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

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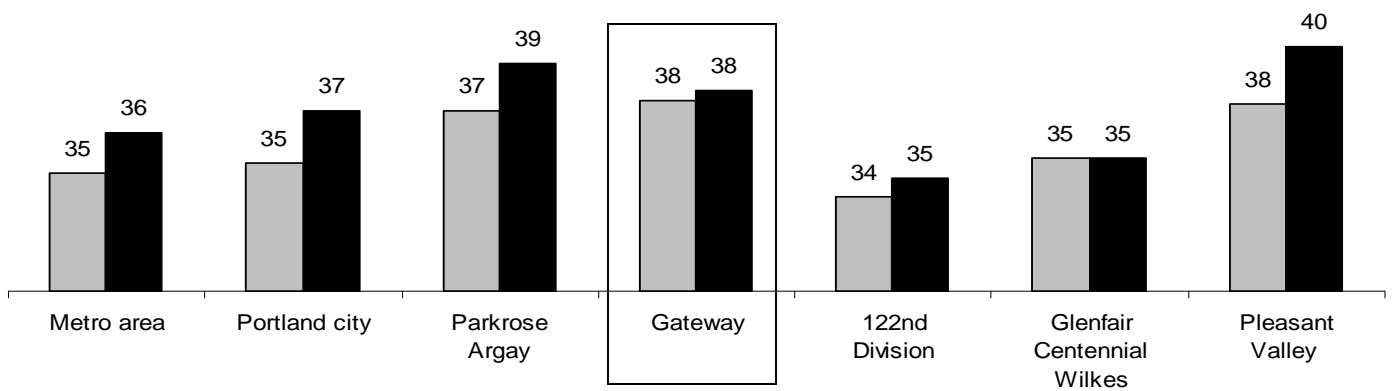
Gateway Analysis Area Demographics (2000 – 2010)

Population

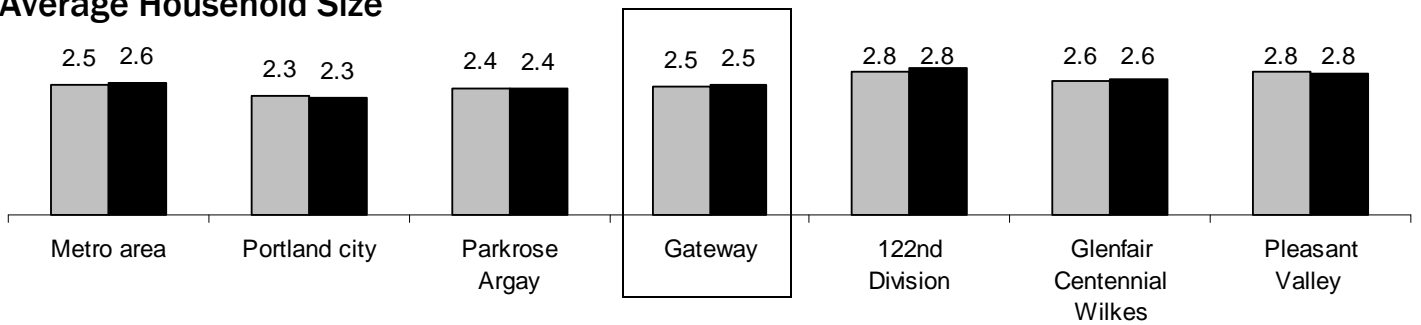
	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	2,226,000	589,000	30,931	14,703	28,498	40,102	31,343	11,809
2000	1,927,881	529,121	19,202	13,173	25,750	32,630	27,509	7,405
% change	12.9%	10.6%	61.1%	11.6%	10.7%	22.9%	13.9%	59.5%

■ 2000 ■ 2010

Median Age

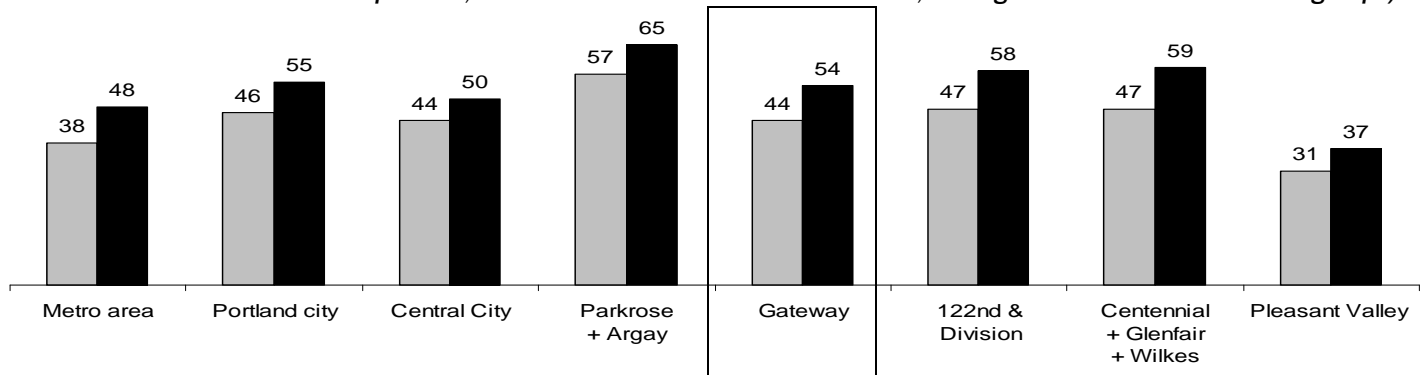


Average Household Size

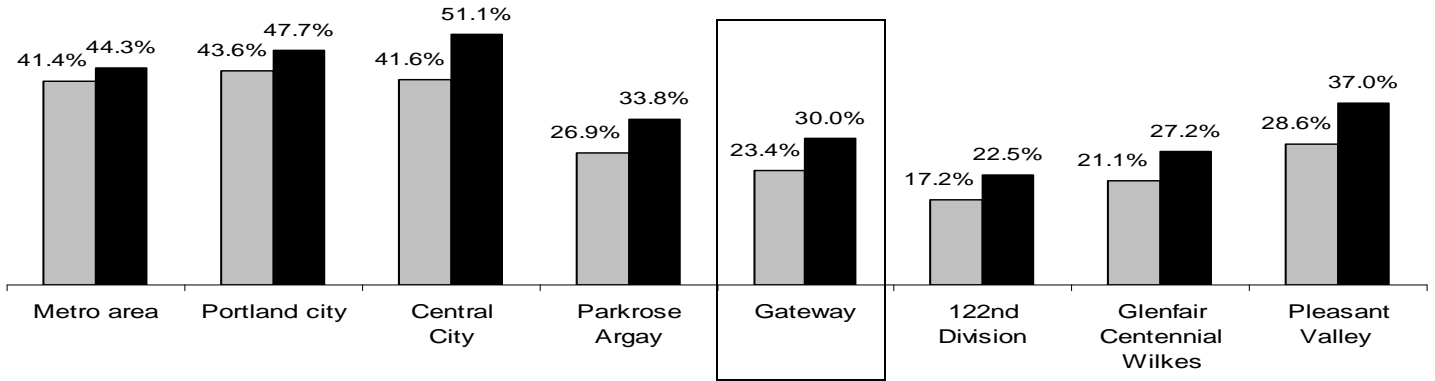


Diversity Index

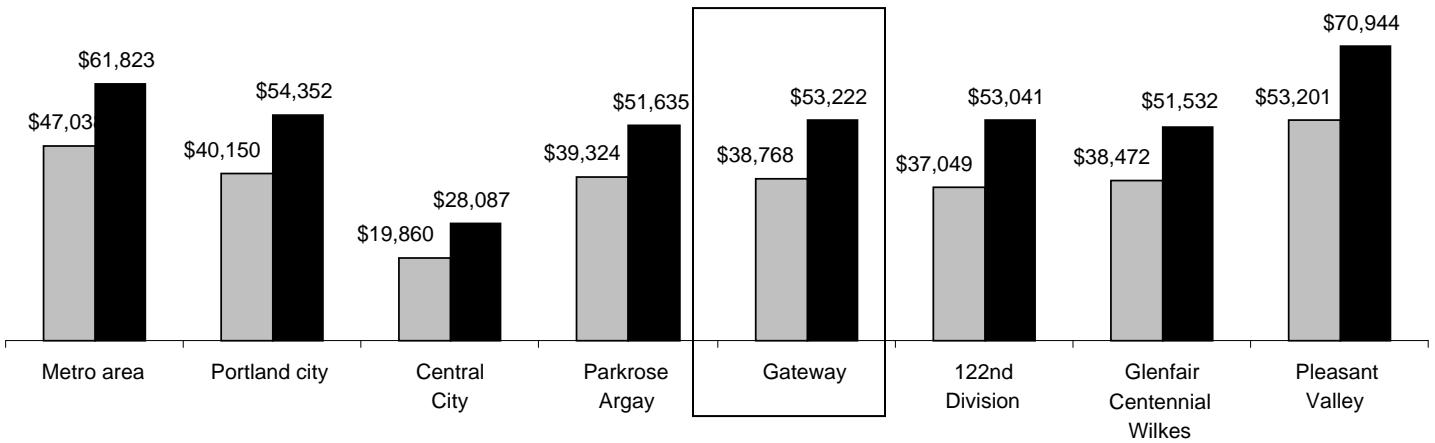
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



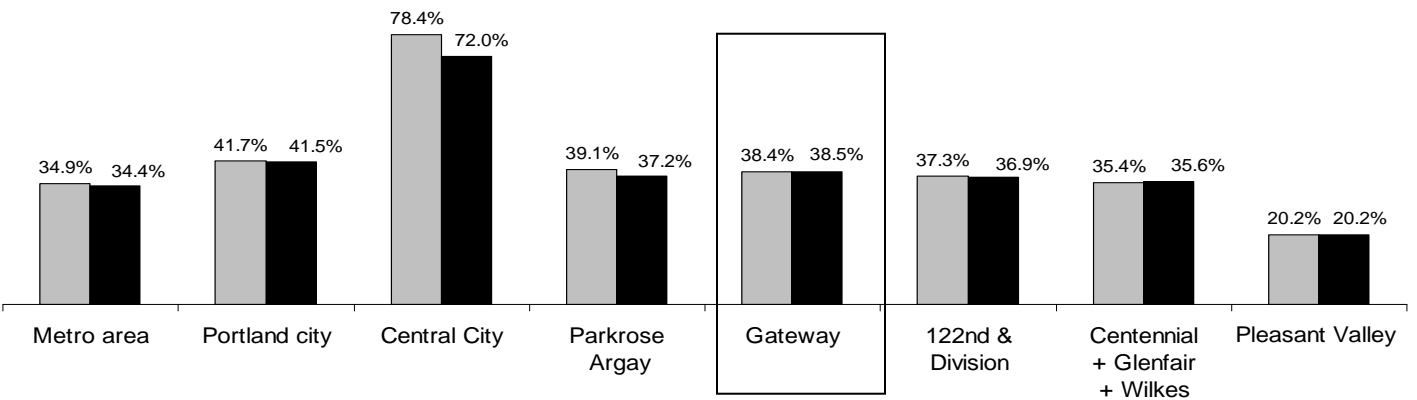
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	273,500	253,184	400,314	\$270,425	\$228,955	208,480	229,875	\$303,102
2000	168,347	154,721	250,566	\$163,771	\$143,033	133,205	143,259	\$177,778
% change	62.5%	63.6%	59.8%	65.1%	60.1%	56.5%	60.5%	70.5%

Percent of Renters of Occupied Housing Units



Gateway Analysis Area

Commercial Real Estate Indicators

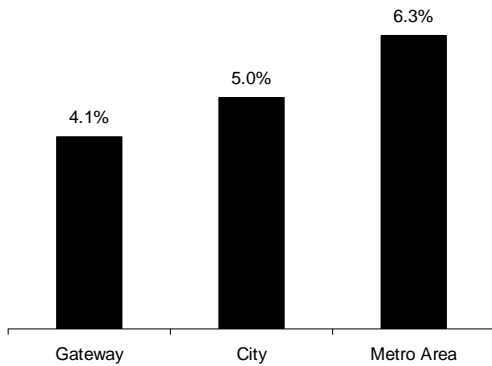
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

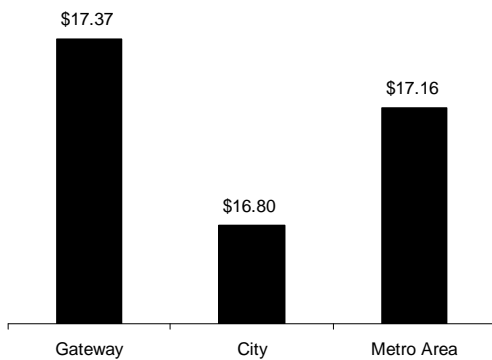
Square Feet

Gateway	City	Metro Area
3,265,804	51,937,895	107,875,146

Retail Vacancy



Retail Rents

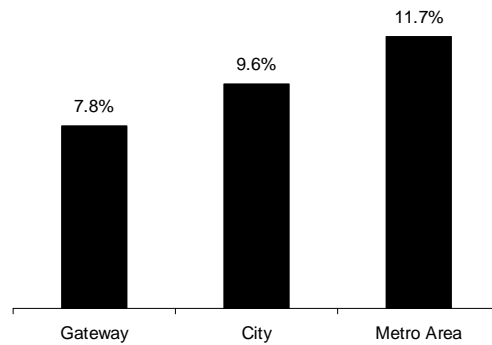


OFFICE SPACE

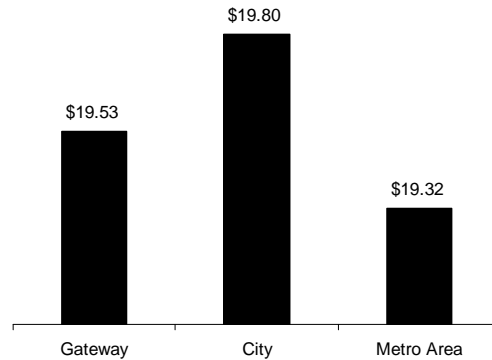
Square Feet

Gateway	City	Metro Area
1,104,817	54,348,765	92,465,455

Office Vacancy



Office Rents



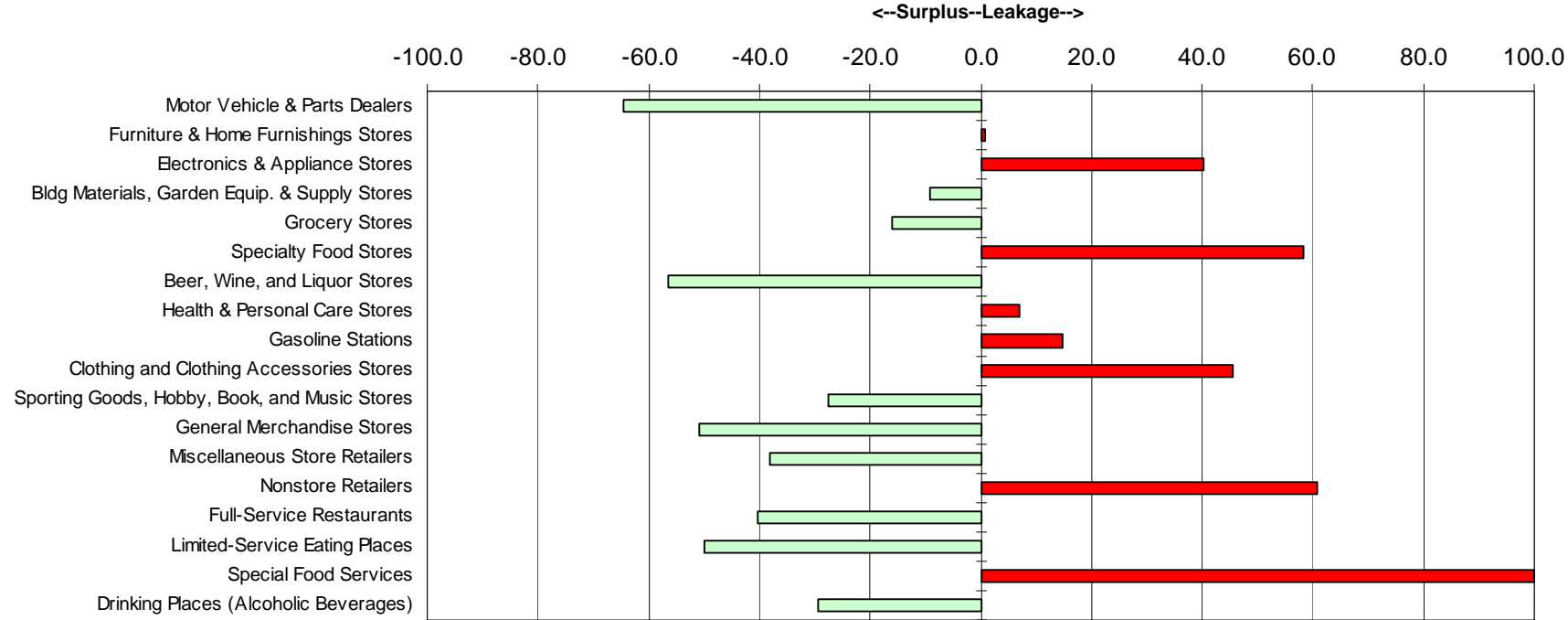
Gateway Analysis Area

Retail Market Profile

Retail Gap = \$301 million (surplus)

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$247,808,967	\$548,926,761	-\$301,117,794	-37.8	262
Total Retail Trade (NAICS 44-45)	\$211,294,059	\$464,990,766	-\$253,696,707	-37.5	175
Total Food & Drink (NAICS 722)	\$36,514,908	\$83,935,995	-\$47,421,087	-39.4	87

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Gateway Analysis Area

Employment

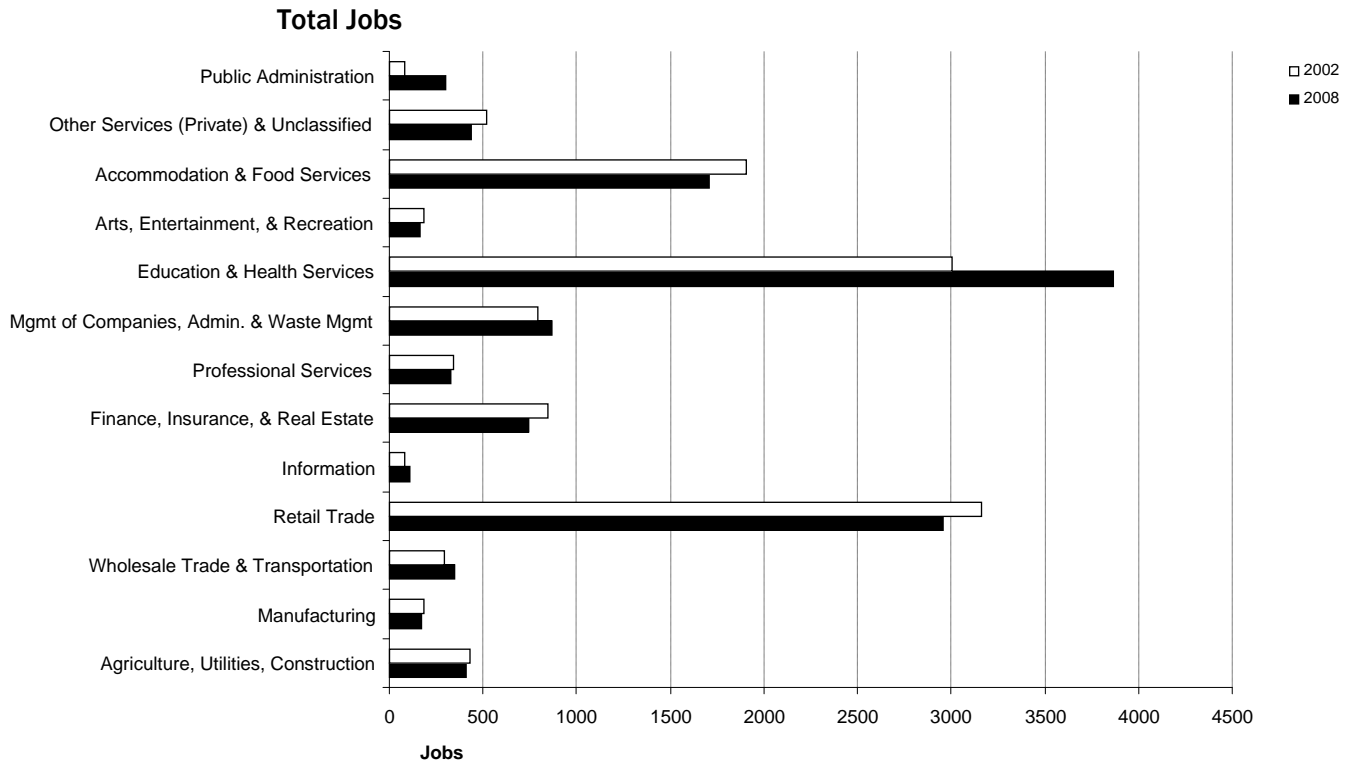
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

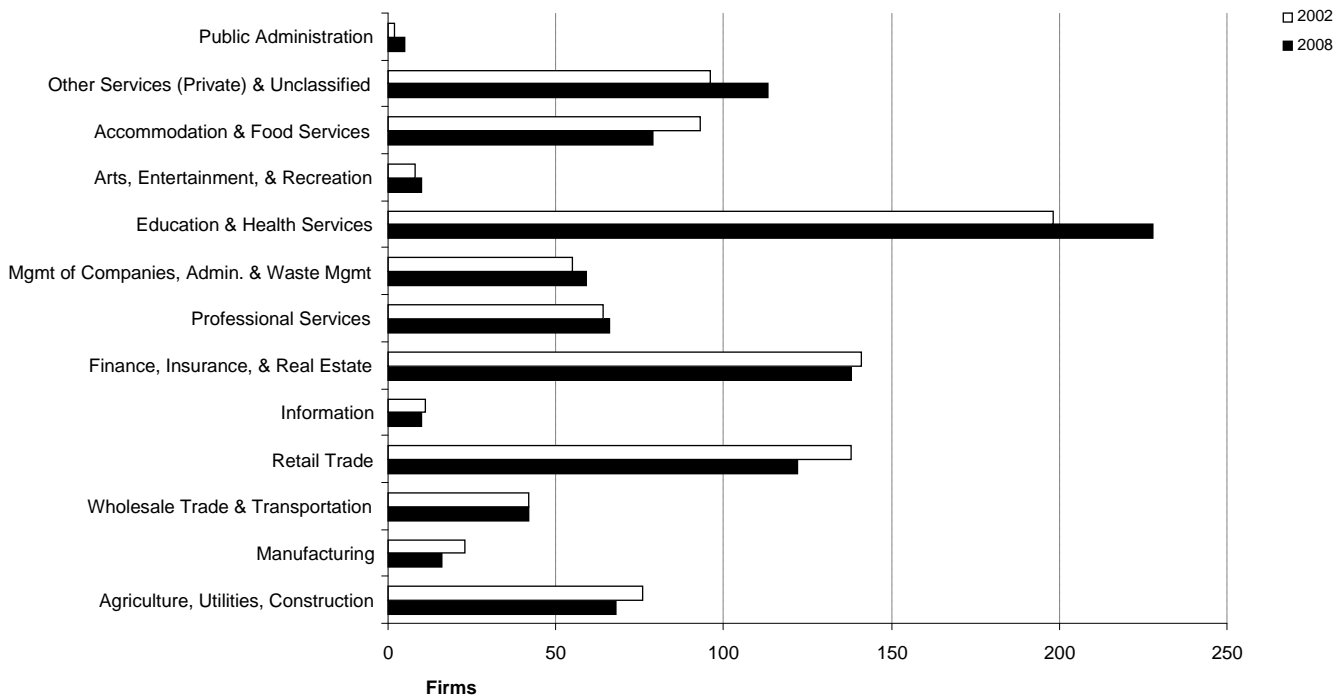
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

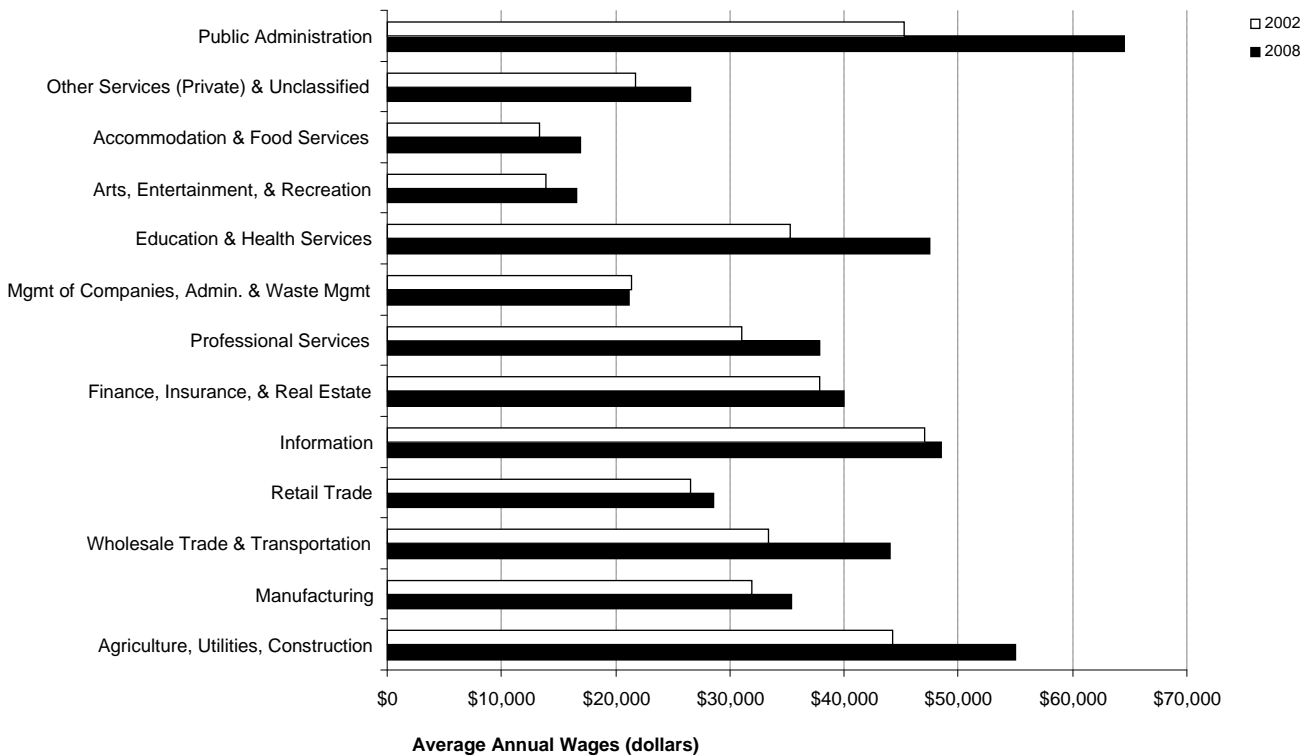
	2002	2008	change
Total Jobs	11,823	12,421	+598
Total Firms	947	956	+9
Average Annual Wages	\$27,960	\$35,607	+7,647



Total Firms



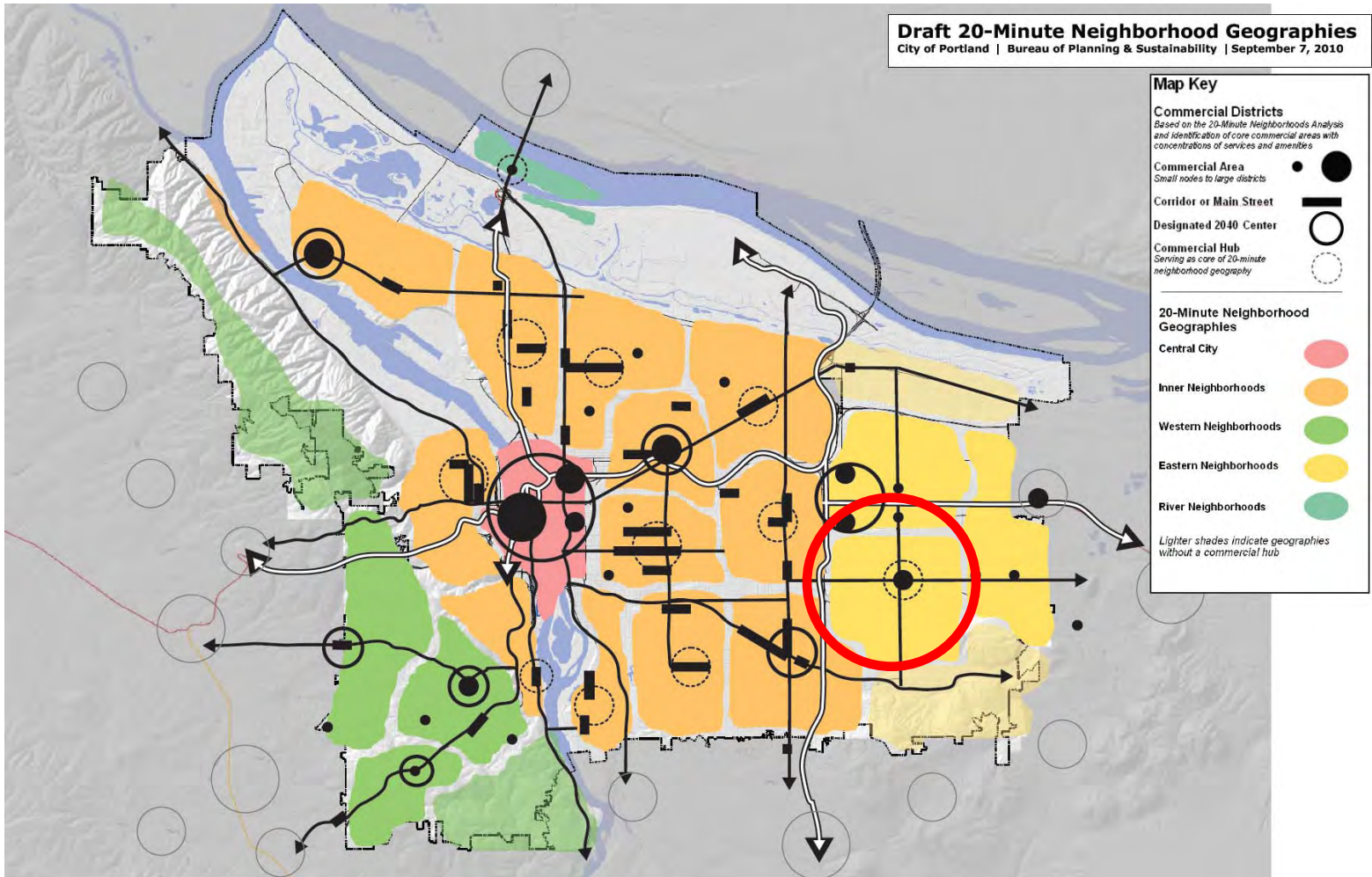
Average Annual Wages



122nd-Division Analysis Area

Including Powellhurst-Gilbert, Mill Park, and parts of the Hazelwood and Lents neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

122nd-Division Analysis Area

Services and Amenities

Population: 40,100 people (13,700 households)
Land Area: 5.6 sq. miles (7,200 people per sq. mile)

Commercial Districts

The area's largest concentration of commercial services is located at SE Division and 122nd Avenue. A smaller cluster of commercial services is located at SE Powell and 122nd Avenue.

Grocery stores: 3

Community Amenities

Community Centers: None (East Portland Community Center located just outside northern edge of analysis area)

Libraries: None (Midland Library located just outside northern edge of analysis area)

Parks and Open Spaces: 131 acres – including Cherry, Mill, Lincoln, West Powellhurst, Ed Benedict, Earl Boyles, Gilbert Heights, and Raymond parks, Kelly Butte Natural Area, and Beggars-tick Wildlife Refuge.

Tree Canopy Coverage: 26%

Public Schools: 1 high school (David Douglas – at northern edge of analysis area)
 7 K-8 schools (Cherry Park, Mill Park, Lincoln Park, West Powellhurst, Earl Boyles, and Gilbert Heights elementary schools; Ron Russell Middle Schools)

Colleges (campus): None

Hospitals: 1 (Adventist Medical Center – at northwest edge of analysis area)

Farmers Markets: None

Transit Centers/Stations: 3 (SE Division, SE Powell and SE Holgate light rail stations – all located at western edge of analysis area)

Walkable Access Score: 47 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

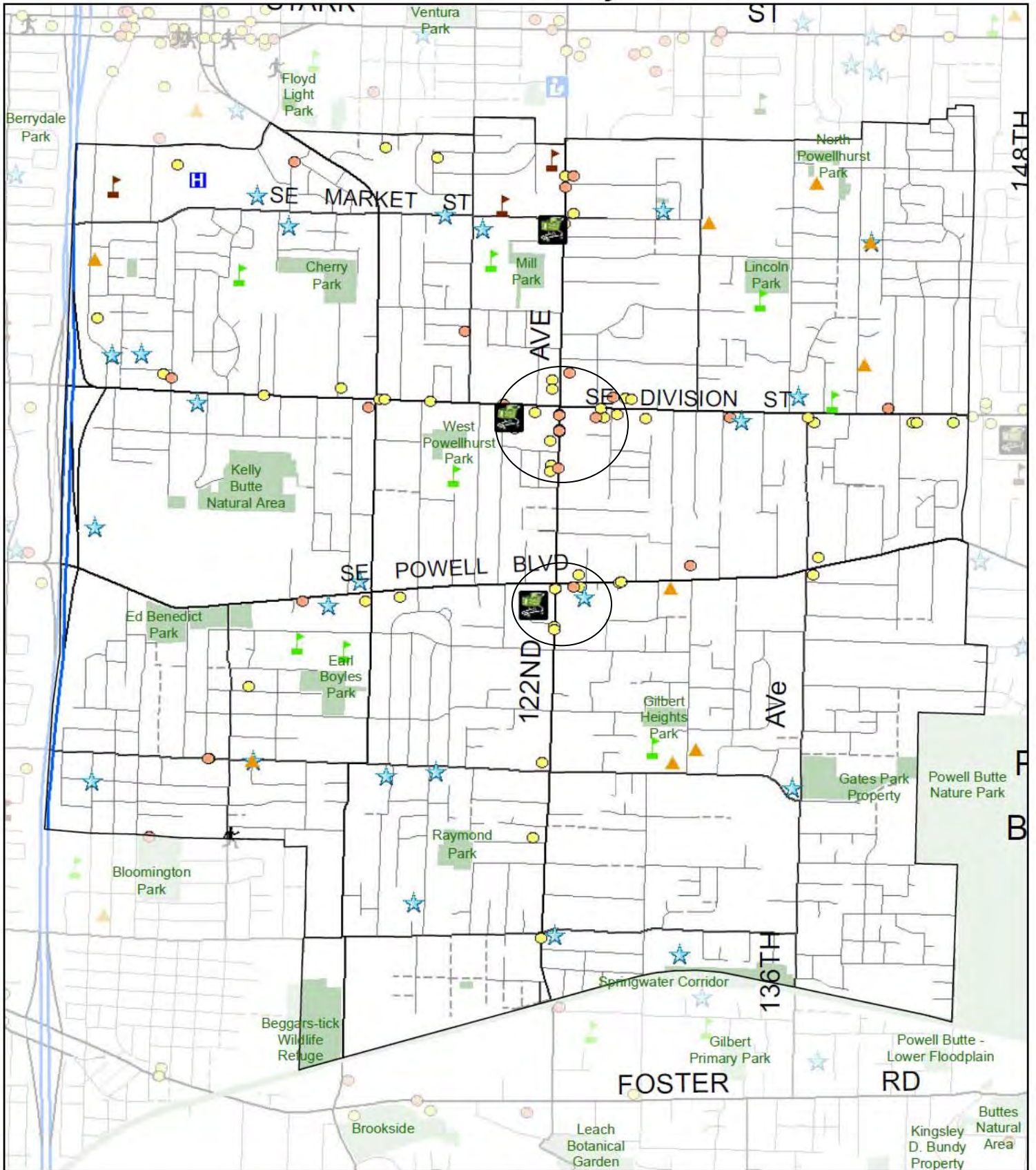
Within 1/2 mile of a park:	99%
Within 1/2 mile of a public elementary school:	32%
Within 3 miles of a full-service community center:	92%
Within 1/2 mile of a full-service grocery store:	15%
Within 1/4 mile of a frequent service transit stop:	15%

Neighborhood and Business Associations

Neighborhood Associations: Powellhurst-Gilbert, Mill Park, and parts of Hazelwood and Lents

Business Associations: Gateway Area and Midway business associations

122nd - Division Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- ★ Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- ▲ Daycare Centers



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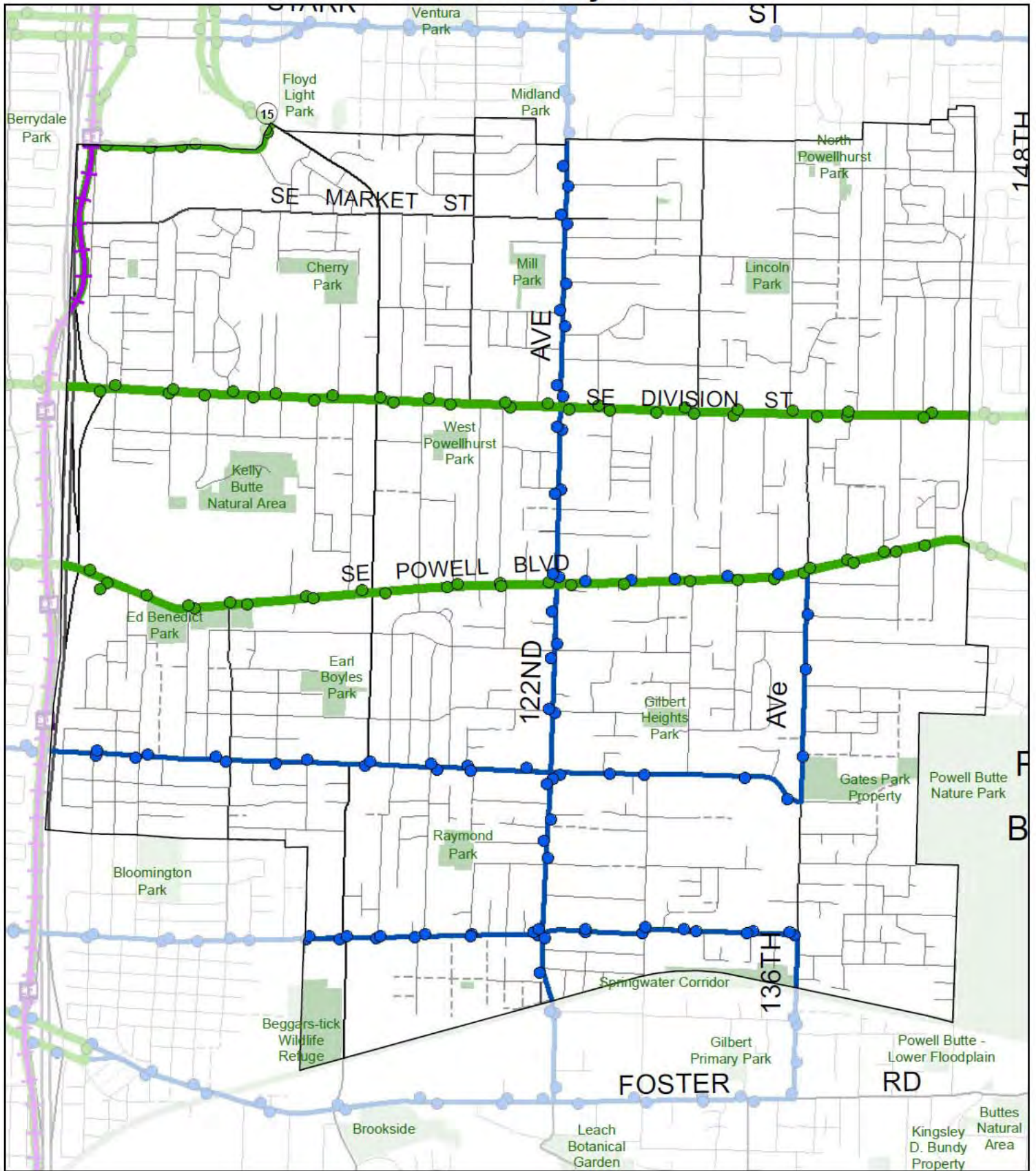


March 25, 2011

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commercial data from InfoUSA 2008

122nd-Division Analysis Area



Transit Infrastructure

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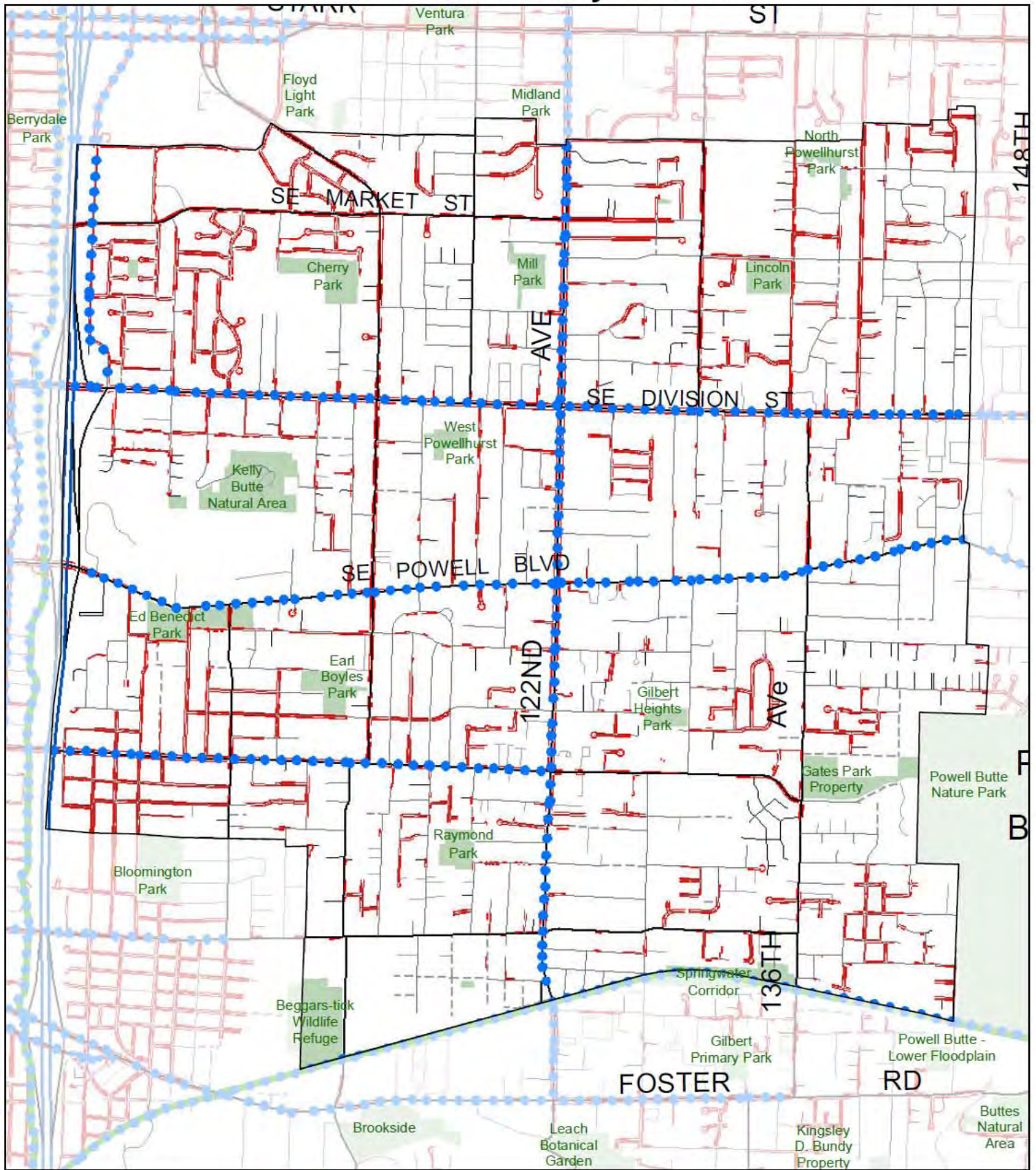
- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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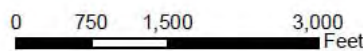
May 12, 2011

122nd-Division Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

122nd-Division Analysis Area

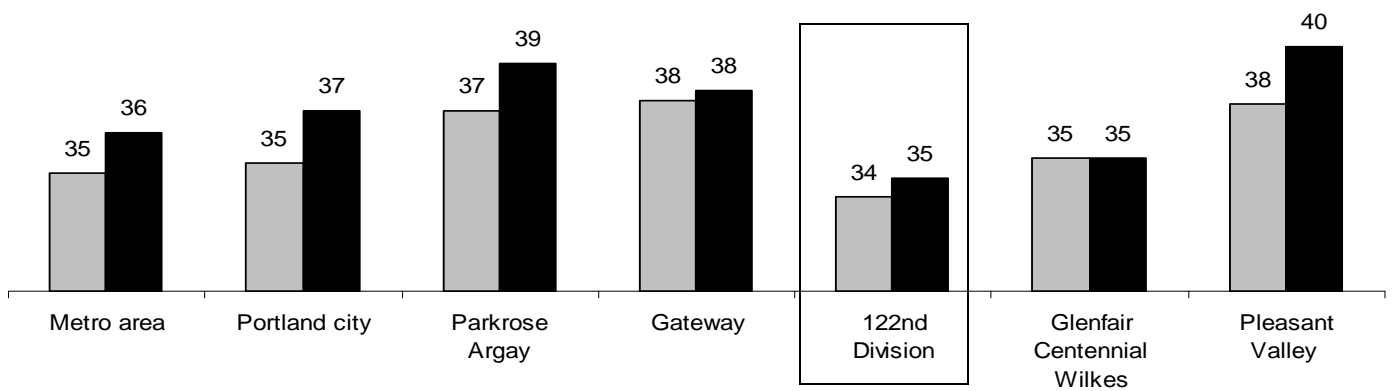
Demographics (2000 – 2010)

Population

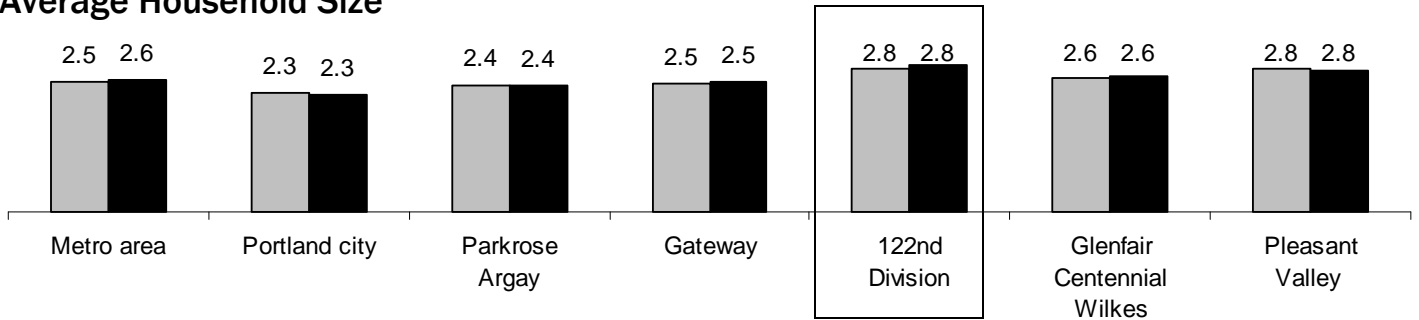
	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	2,226,000	589,000	30,931	14,703	28,498	40,102	31,343	11,809
2000	1,927,881	529,121	19,202	13,173	25,750	32,630	27,509	7,405
% change	12.9%	10.6%	61.1%	11.6%	10.7%	22.9%	13.9%	59.5%

■ 2000 ■ 2010

Median Age

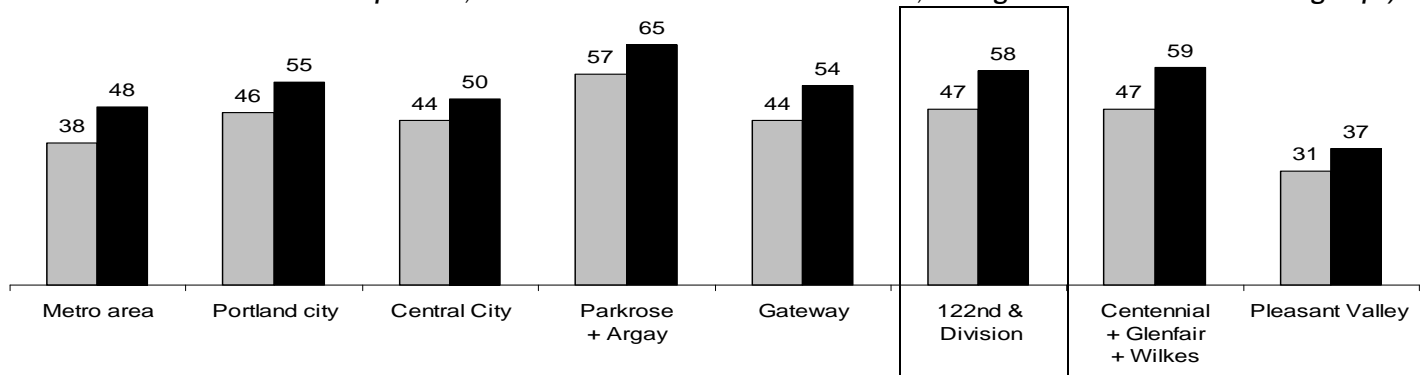


Average Household Size

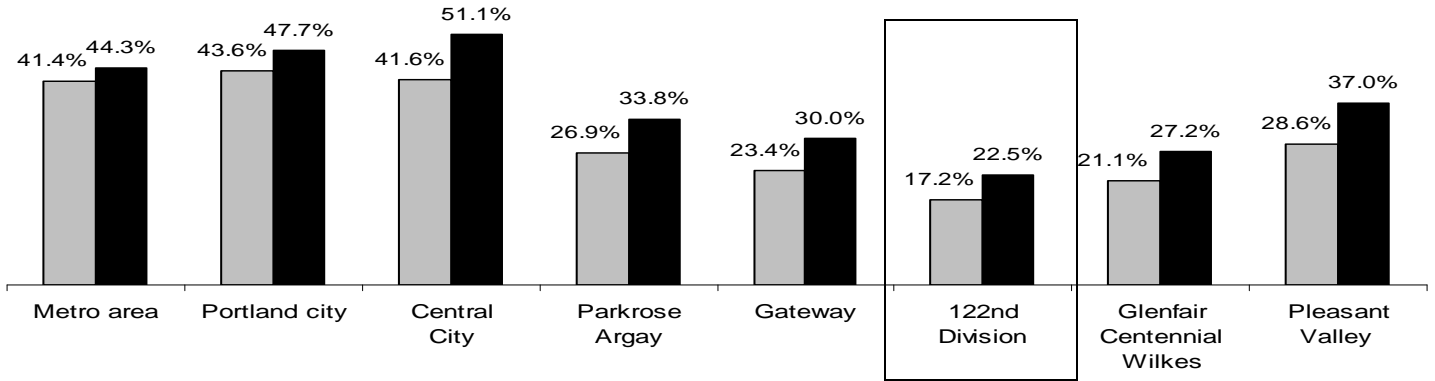


Diversity Index

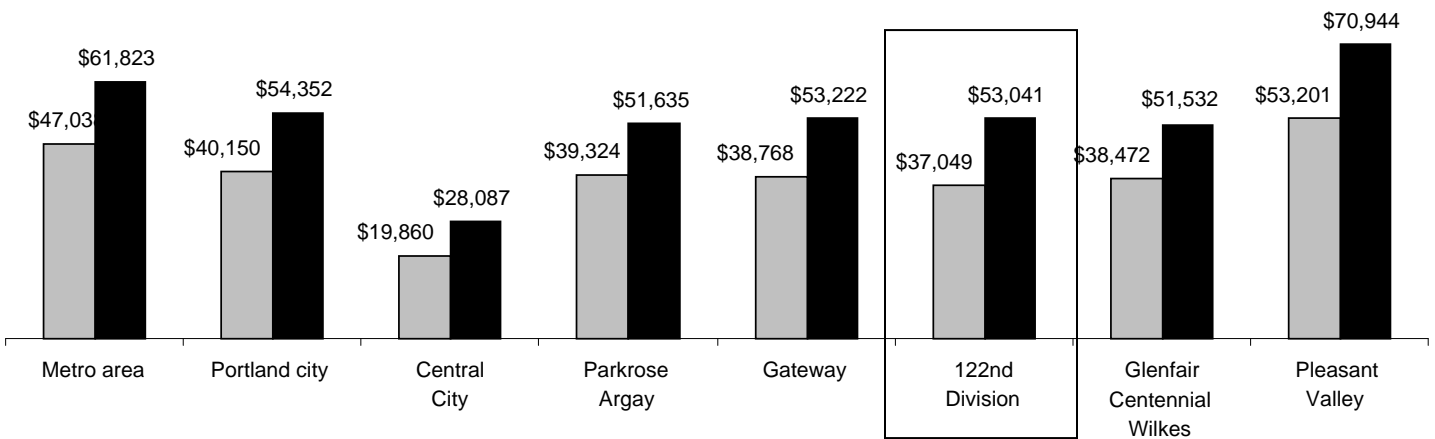
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



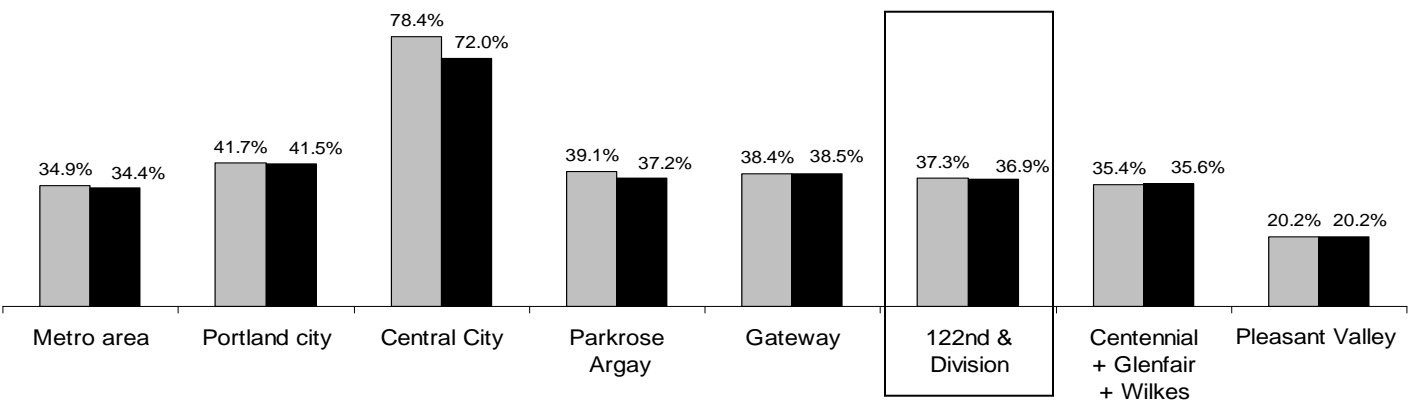
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	273,500	253,184	400,314	\$270,425	\$228,955	208,480	229,875	\$303,102
2000	168,347	154,721	250,566	\$163,771	\$143,033	133,205	143,259	\$177,778
% change	62.5%	63.6%	59.8%	65.1%	60.1%	56.5%	60.5%	70.5%

Percent of Renters of Occupied Housing Units



122nd-Division Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

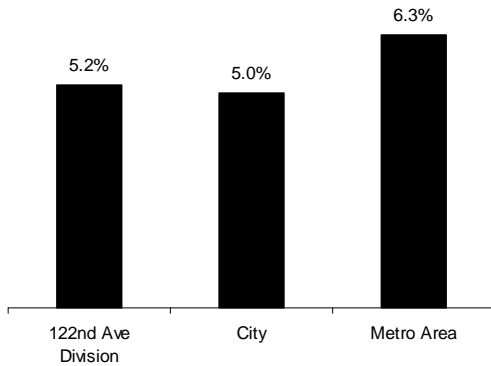
122 nd & Div	City	Metro Area
3,265,804	51,937,895	107,875,146

OFFICE SPACE

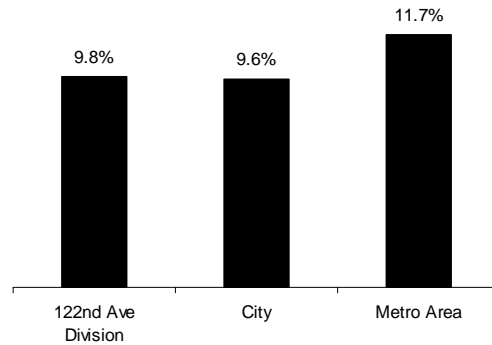
Square Feet

122 nd & Div	City	Metro Area
1,104,817	54,348,765	92,465,455

Retail Vacancy



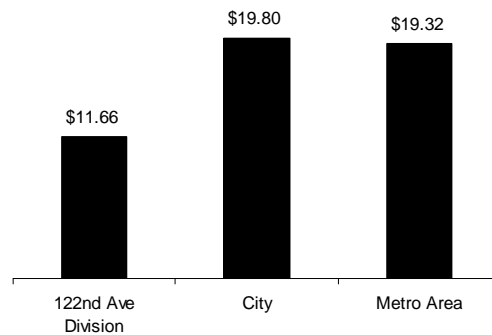
Office Vacancy



Retail Rents



Office Rents



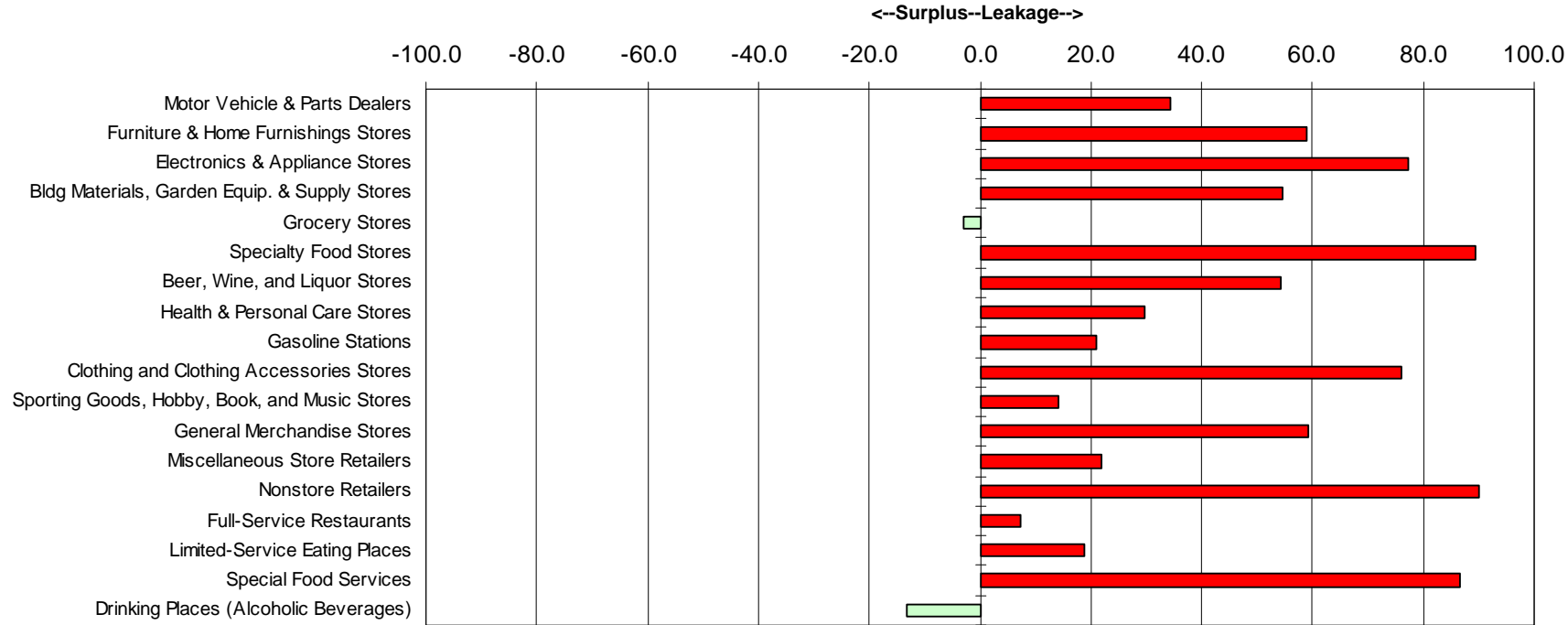
122nd-Division Analysis Area

Retail Market Profile

Retail Gap = \$126 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$290,131,114	\$163,880,855	\$126,250,259	27.8	181
Total Retail Trade (NAICS 44-45)	\$247,421,959	\$132,790,107	\$114,631,852	30.1	124
Total Food & Drink (NAICS 722)	\$42,709,155	\$31,090,748	\$11,618,407	15.7	57

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



122nd-Division Analysis Area

Employment

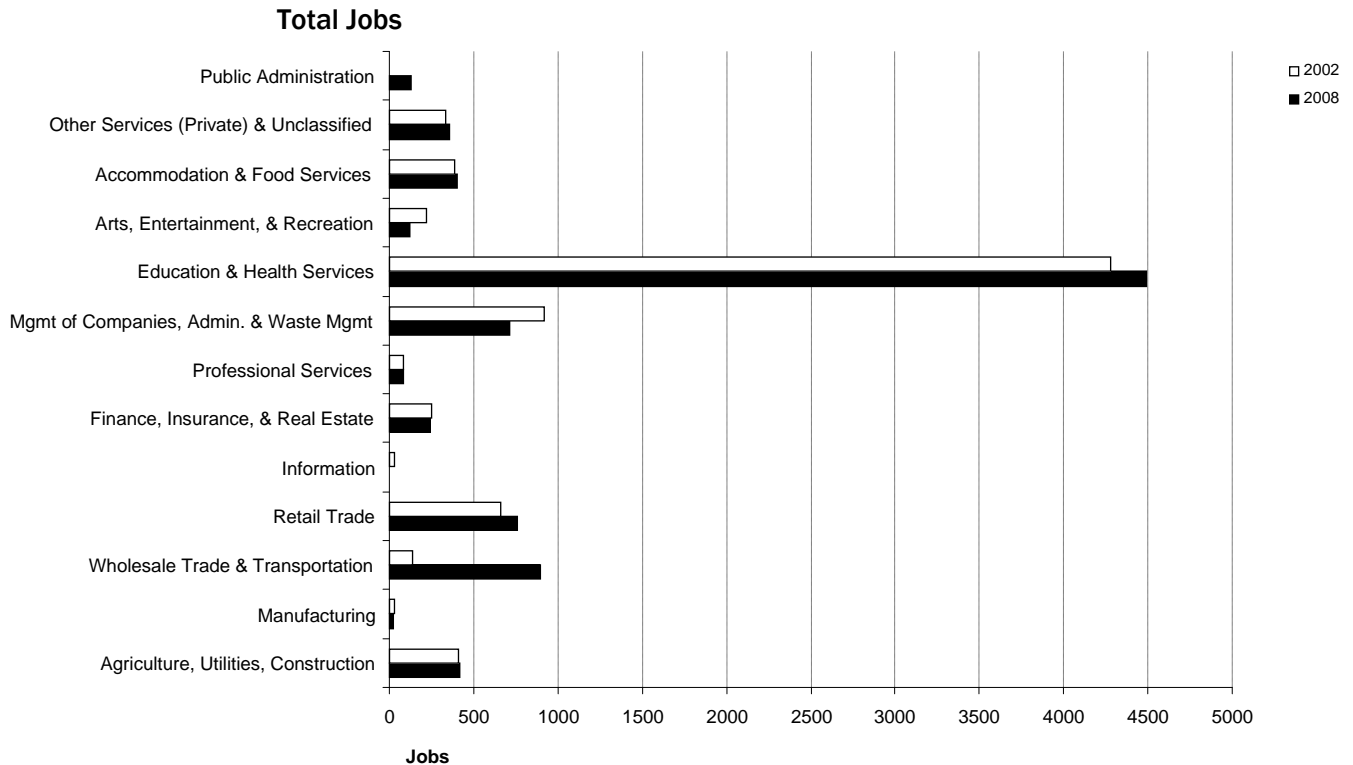
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

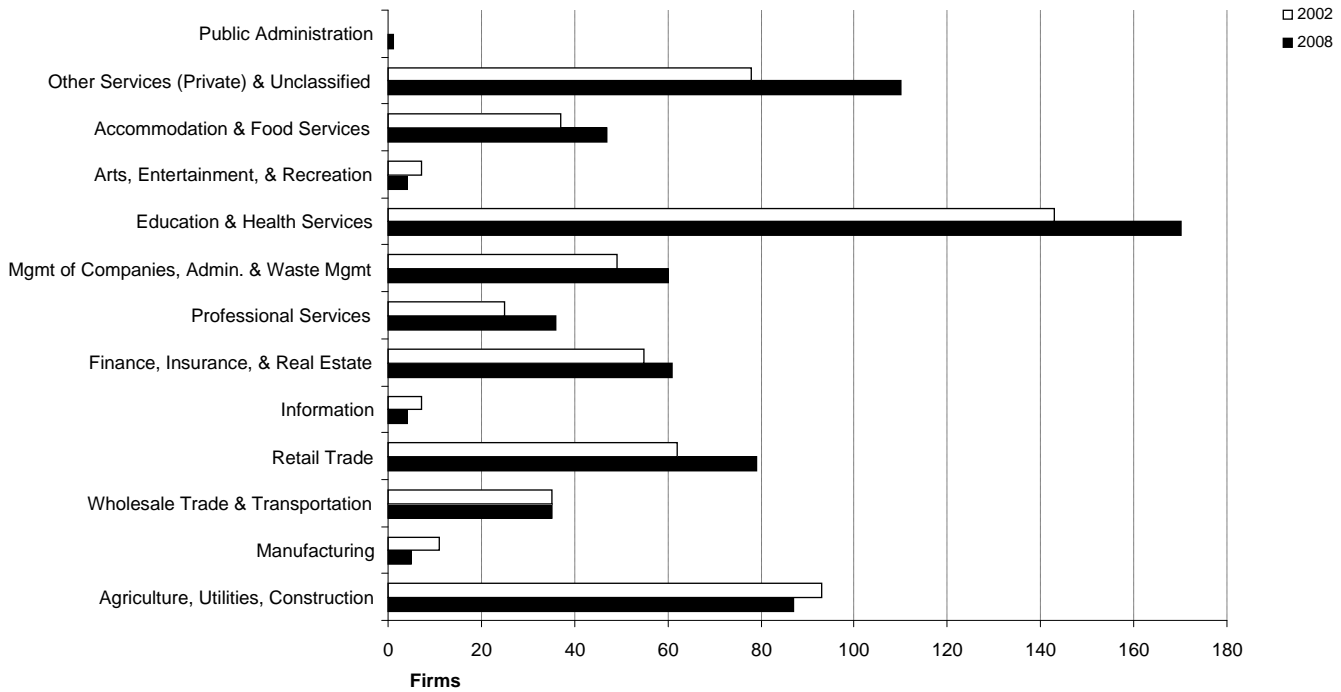
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

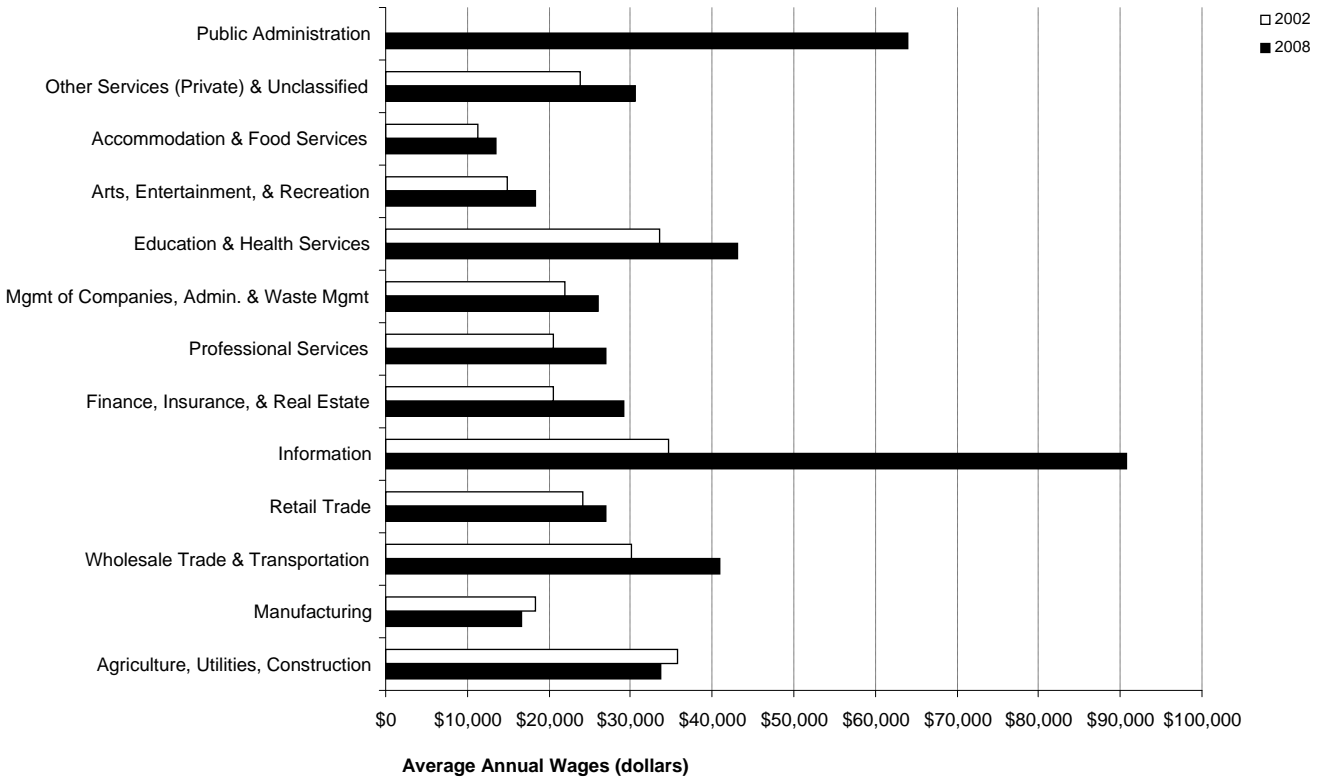
	2002	2008	change
Total Jobs	7,773	8,642	+909
Total Firms	602	699	+97
Average Annual Wages	\$29,253	\$37,347	+8,094



Total Firms



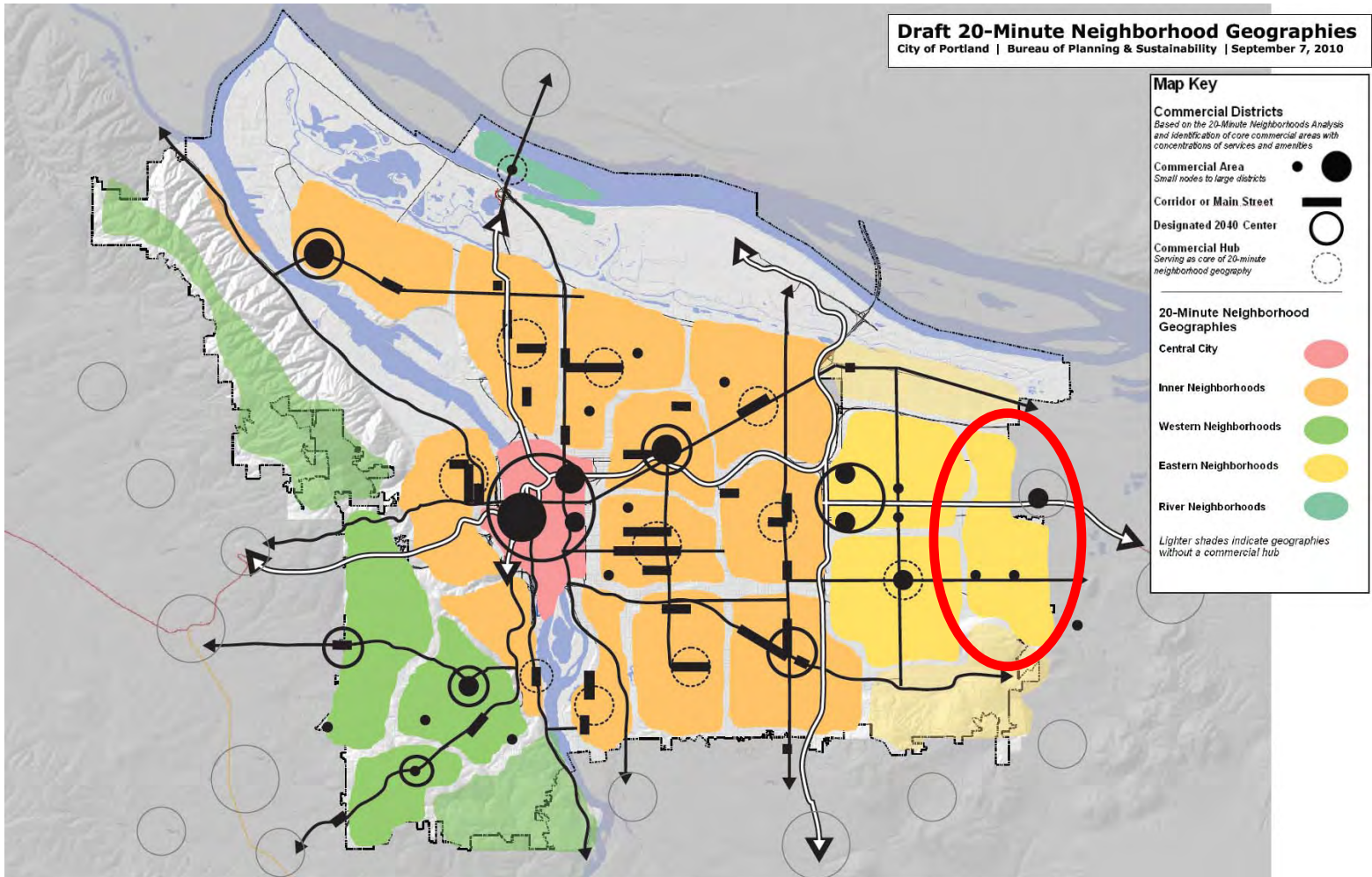
Average Annual Wages



Centennial-Glenfair-Wilkes Analysis Area

Including Centennial, Glenfair, and Wilkes neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Centennial-Glenfair-Wilkes Analysis Area

Services and Amenities

Population: 31,300 people (11,400 households)
Land Area: 4.5 sq. miles (7,100 people per sq. mile)

Commercial Districts

The area has several small clusters of commercial services, the largest of these located at SE Division and 148th Avenue and at SE Division and 162nd Avenue. The largest nearby concentration of commercial services is in Rockwood, located just outside the eastern edge of the analysis area in Gresham.

Grocery stores: 3

Community Amenities

Community Centers: None

Libraries: None (Rockwood Library located just outside eastern edge of analysis area in Gresham)

Parks and Open Spaces: 87 acres – including Glenfair, Parklane, Lynchview, and Lynchwood parks. Powell Butte Nature Park is located at the southern edge of the analysis area.

Tree Canopy Coverage: 24%

Public Schools: 7 elementary schools (Margaret Scott, Glenfair, Four Corners, Harold Oliver, Alder, Lynch View, and Lynch Wood elementary schools)*

**Middle and high schools serving the area (Reynolds and Centennial school districts) are located east of the analysis area in Gresham and Troutdale.*

Colleges (campus): None

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: 2 (E. 148th and E. 162nd light rail stations)

Walkable Access Score: 46 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

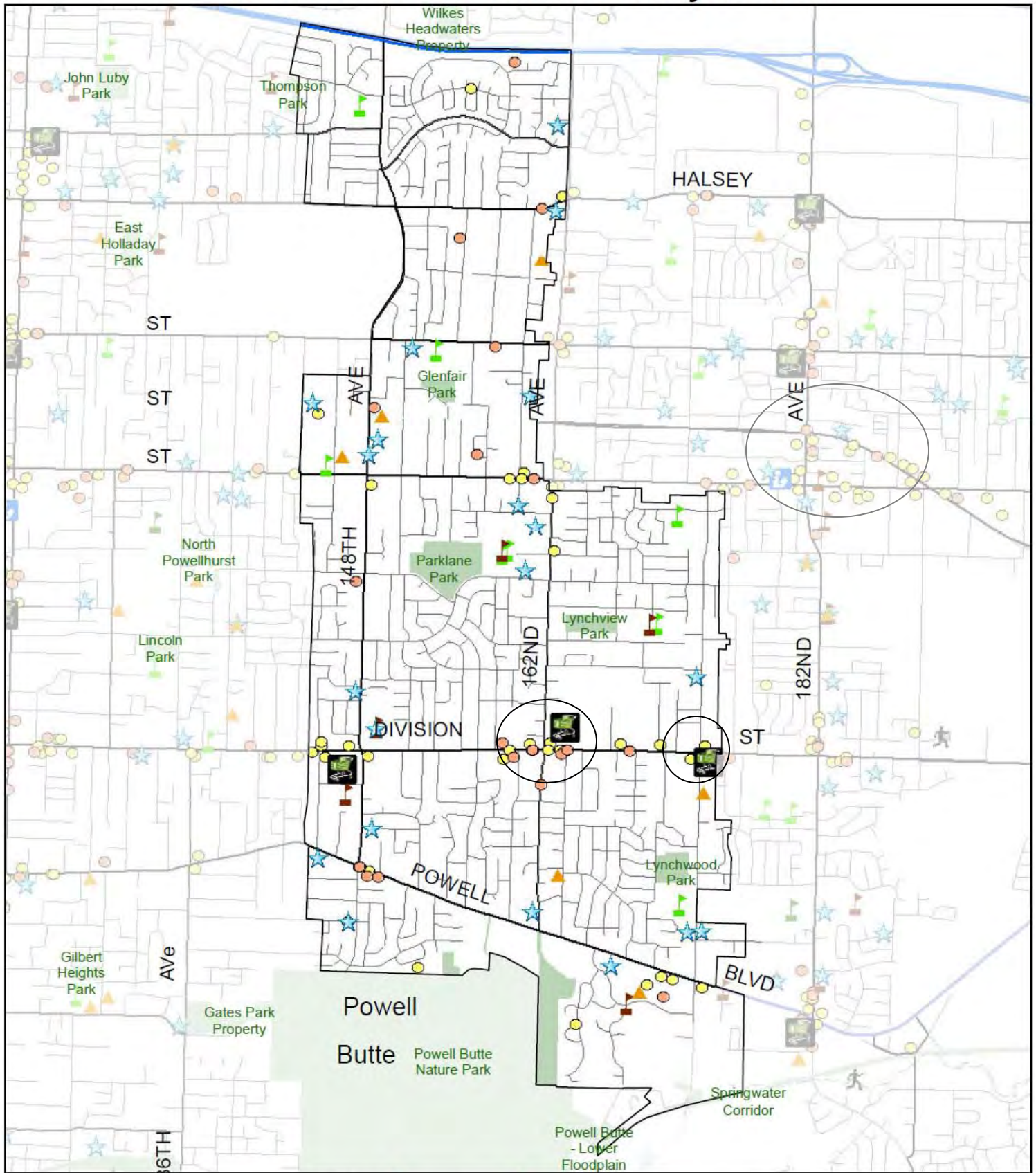
Within 1/2 mile of a park:	79%
Within 1/2 mile of a public elementary school:	25%
Within 3 miles of a full-service community center:	31%
Within 1/2 mile of a full-service grocery store:	16%
Within 1/4 mile of a frequent service transit stop:	14%

Neighborhood and Business Associations

Neighborhood Associations: Centennial, Glenfair, and Wilkes

Business Associations: Gateway Area and Midway business associations

Centennial-Glenfair-Wilkes Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- ★ Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- ▲ Private Schools
- ▲ Daycare Centers



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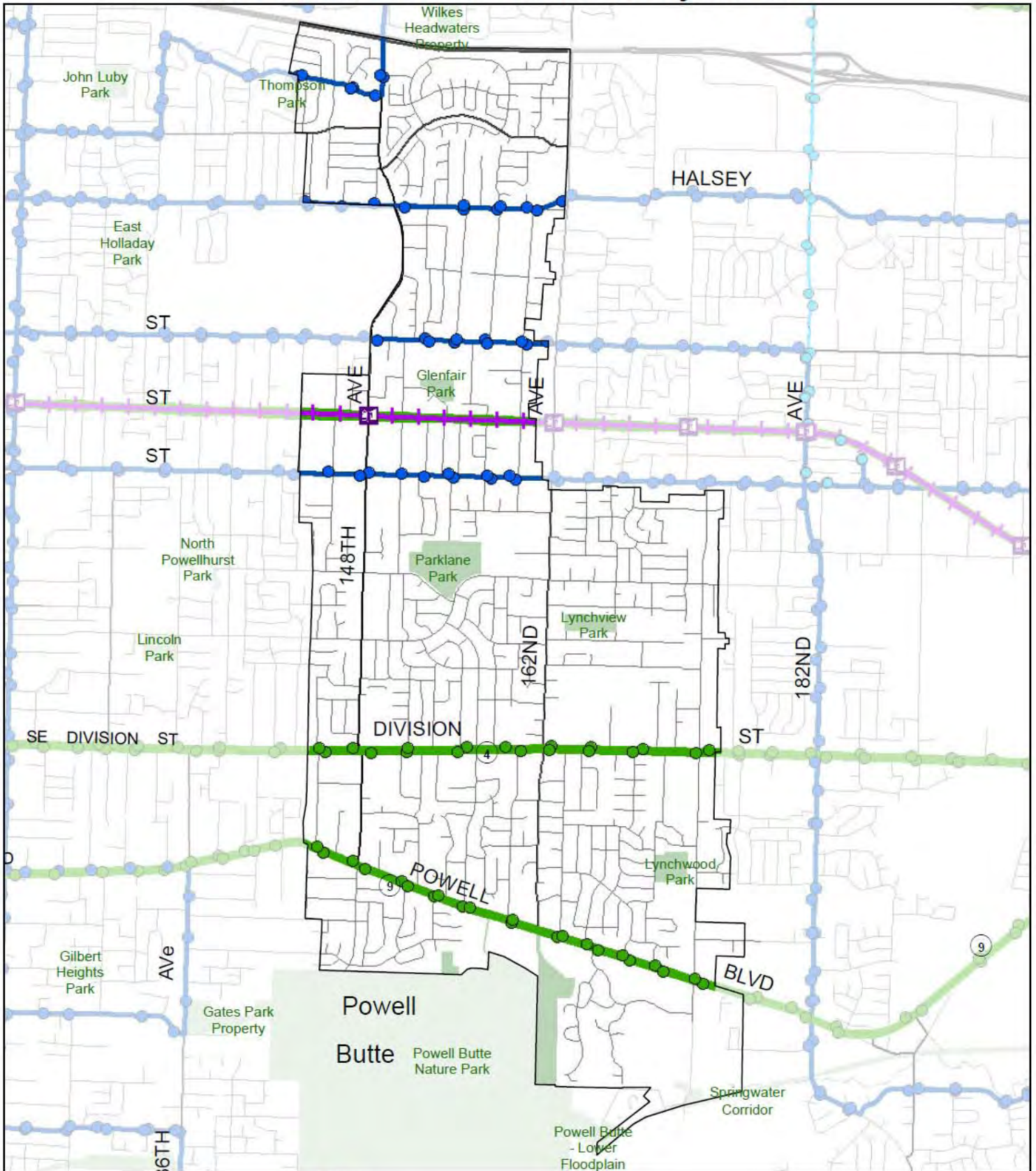
0 750 1,500 3,000
 Feet

March 25, 2011

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commercial data from InfoUSA 2008

Centennial-Glenfair-Wilkes Analysis Area



Transit Infrastructure

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- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



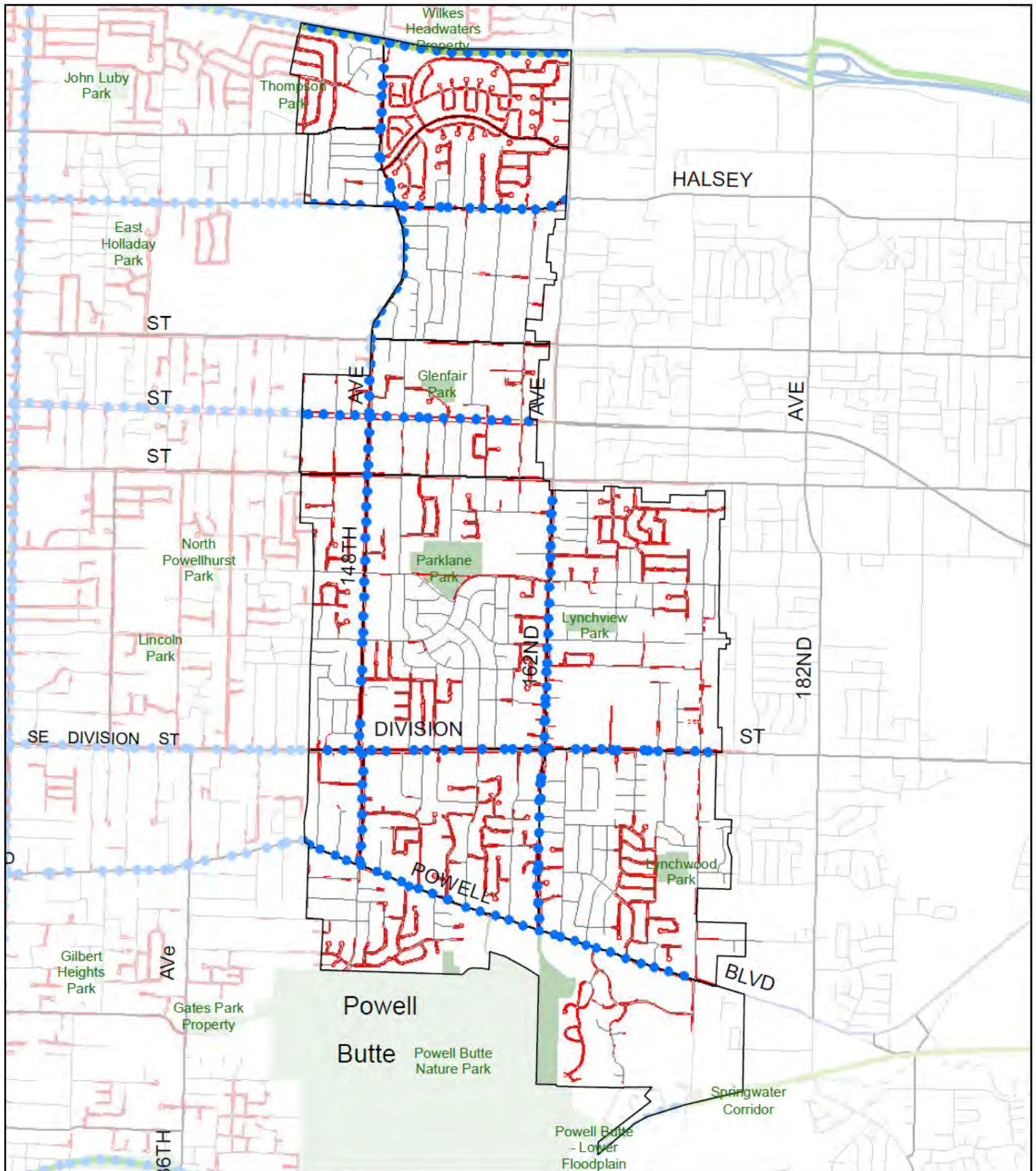
0 750 1,500 3,000 Feet



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May 12, 2011

Centennial-Glenfair-Wilkes Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



0 750 1,500 3,000 Feet



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March 25, 2011

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Centennial-Glenfair-Wilkes Analysis Area

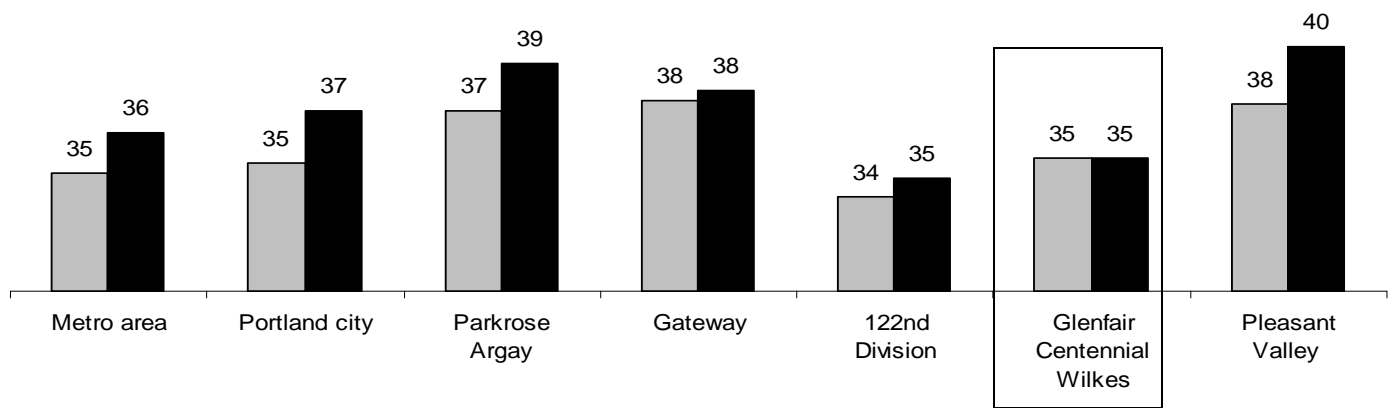
Demographics (2000 – 2010)

Population

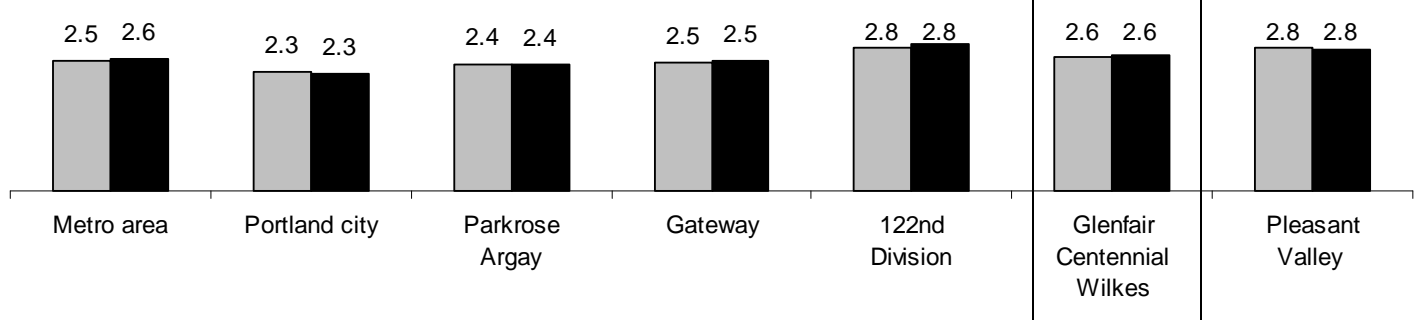
	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	2,226,000	589,000	30,931	14,703	28,498	40,102	31,343	11,809
2000	1,927,881	529,121	19,202	13,173	25,750	32,630	27,509	7,405
% change	12.9%	10.6%	61.1%	11.6%	10.7%	22.9%	13.9%	59.5%

■ 2000 ■ 2010

Median Age

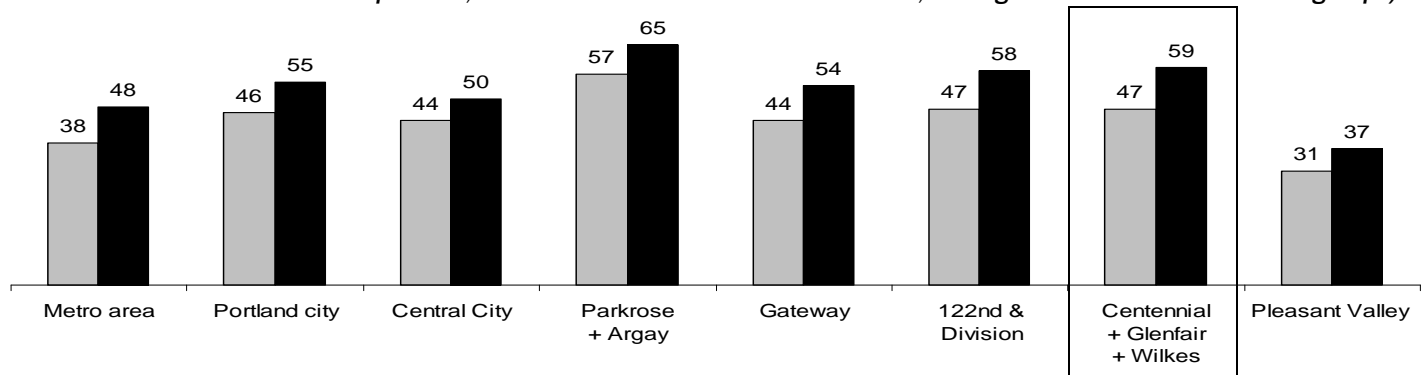


Average Household Size

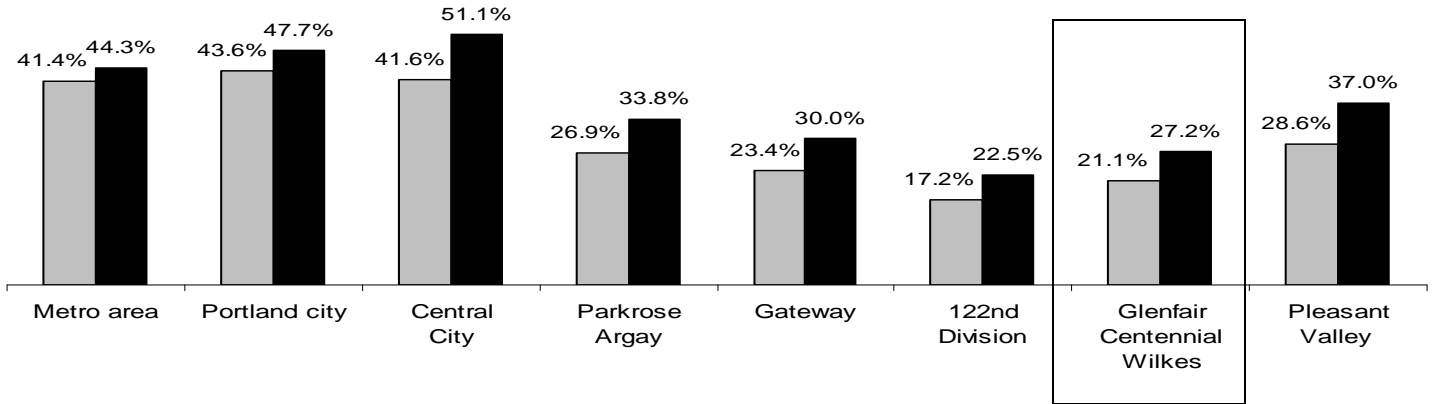


Diversity Index

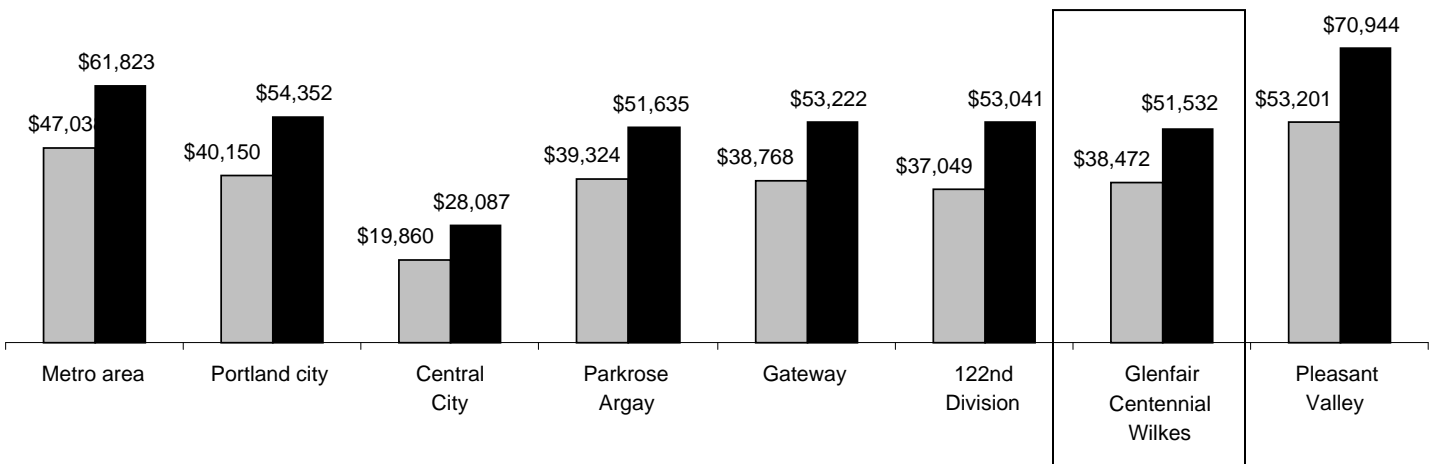
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



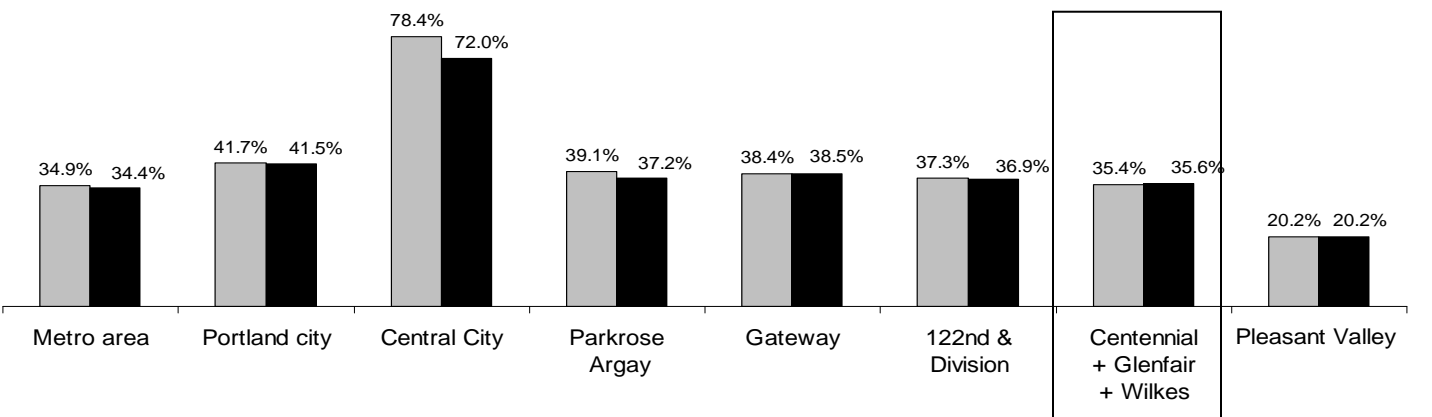
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	273,500	253,184	400,314	\$270,425	\$228,955	208,480	229,875	\$303,102
2000	168,347	154,721	250,566	\$163,771	\$143,033	133,205	143,259	\$177,778
% change	62.5%	63.6%	59.8%	65.1%	60.1%	56.5%	60.5%	70.5%

Percent of Renters of Occupied Housing Units



Centennial-Glenfair-Wilkes Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

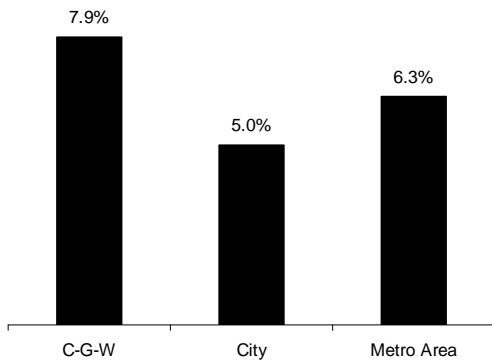
C-G-W	City	Metro Area
818,117	51,937,895	107,875,146

OFFICE SPACE

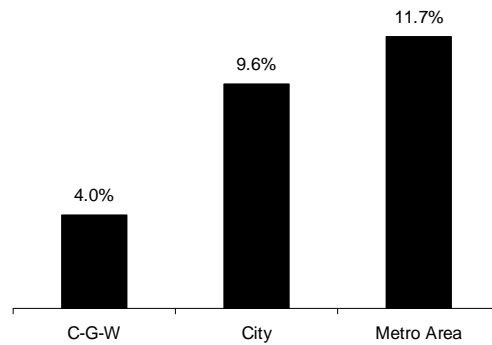
Square Feet

C-G-W	City	Metro Area
88,150	54,348,765	92,465,455

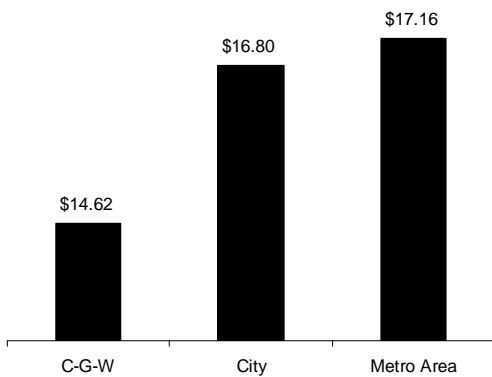
Retail Vacancy



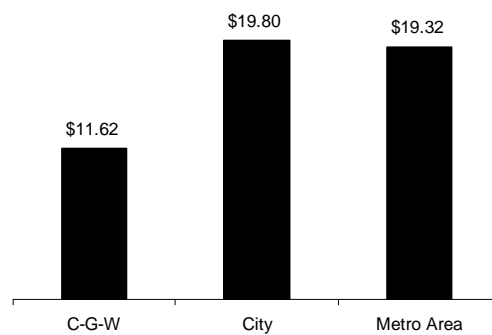
Office Vacancy



Retail Rents



Office Rents



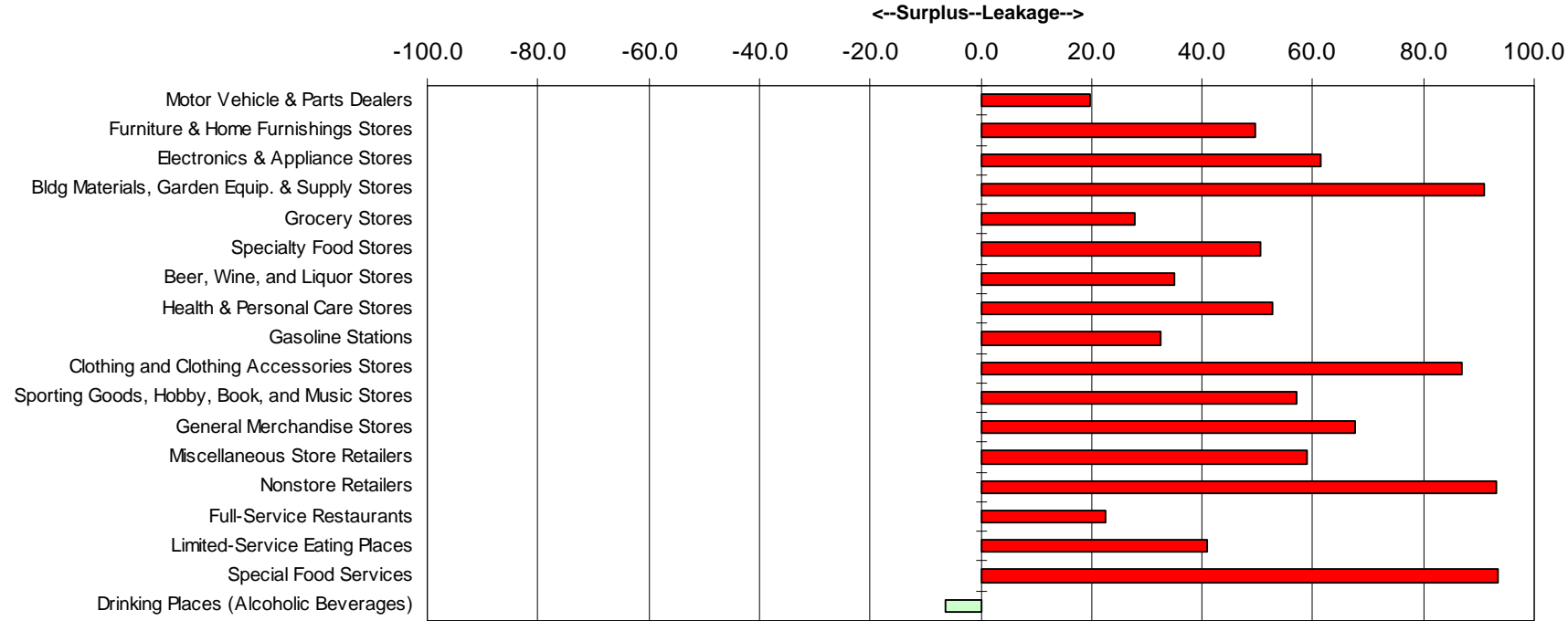
Centennial-Glenfair-Wilkes Analysis Area

Retail Market Profile

Retail Gap = \$142 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$252,384,865	\$110,882,506	\$141,502,359	39.0	127
Total Retail Trade (NAICS 44-45)	\$215,508,193	\$92,018,190	\$123,490,003	40.2	84
Total Food & Drink (NAICS 722)	\$36,876,672	\$18,864,316	\$18,012,356	32.3	43

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Centennial-Glenfair-Wilkes Analysis Area

Employment

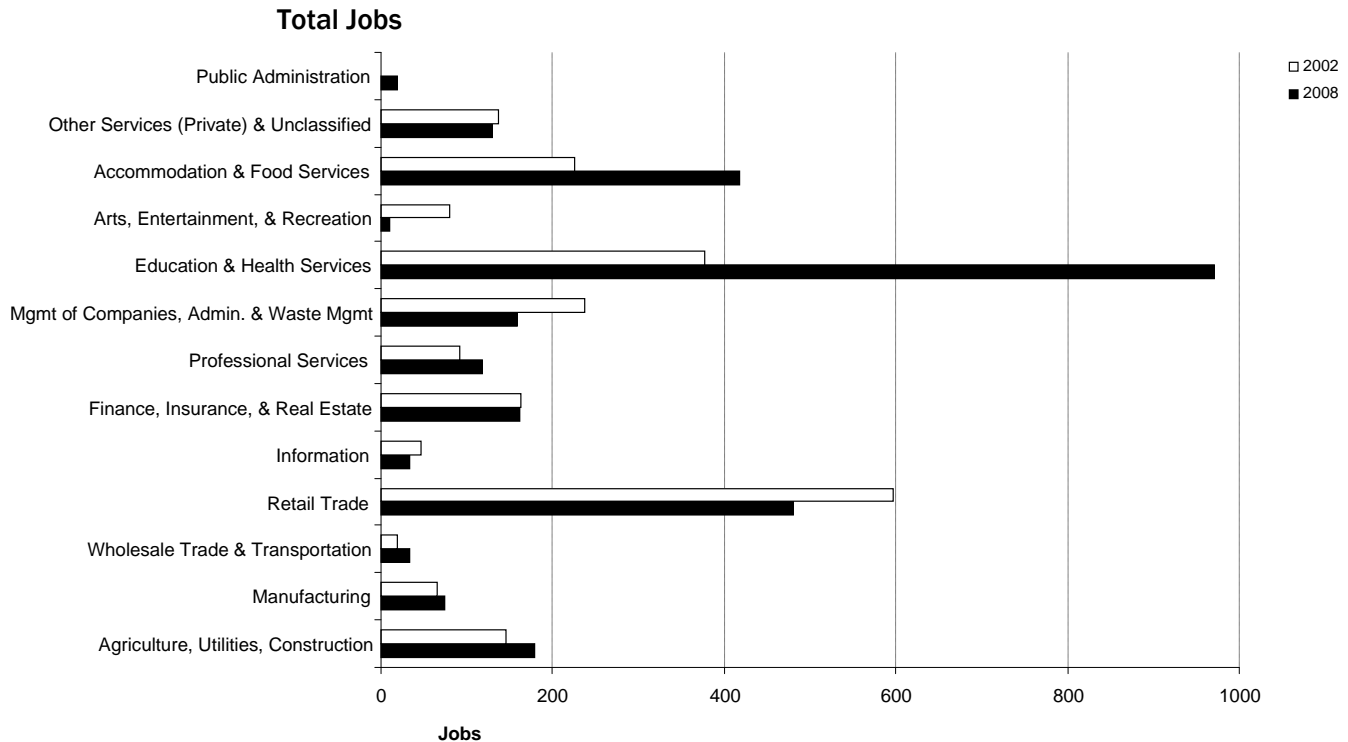
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

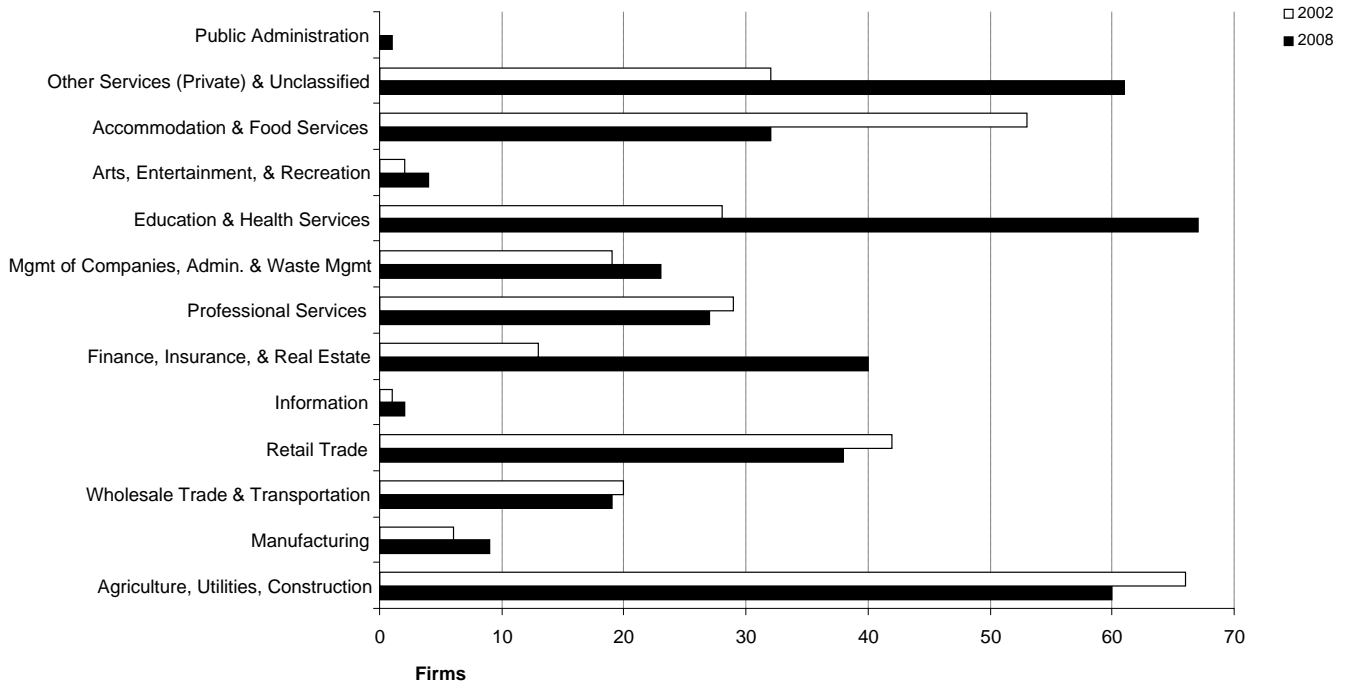
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

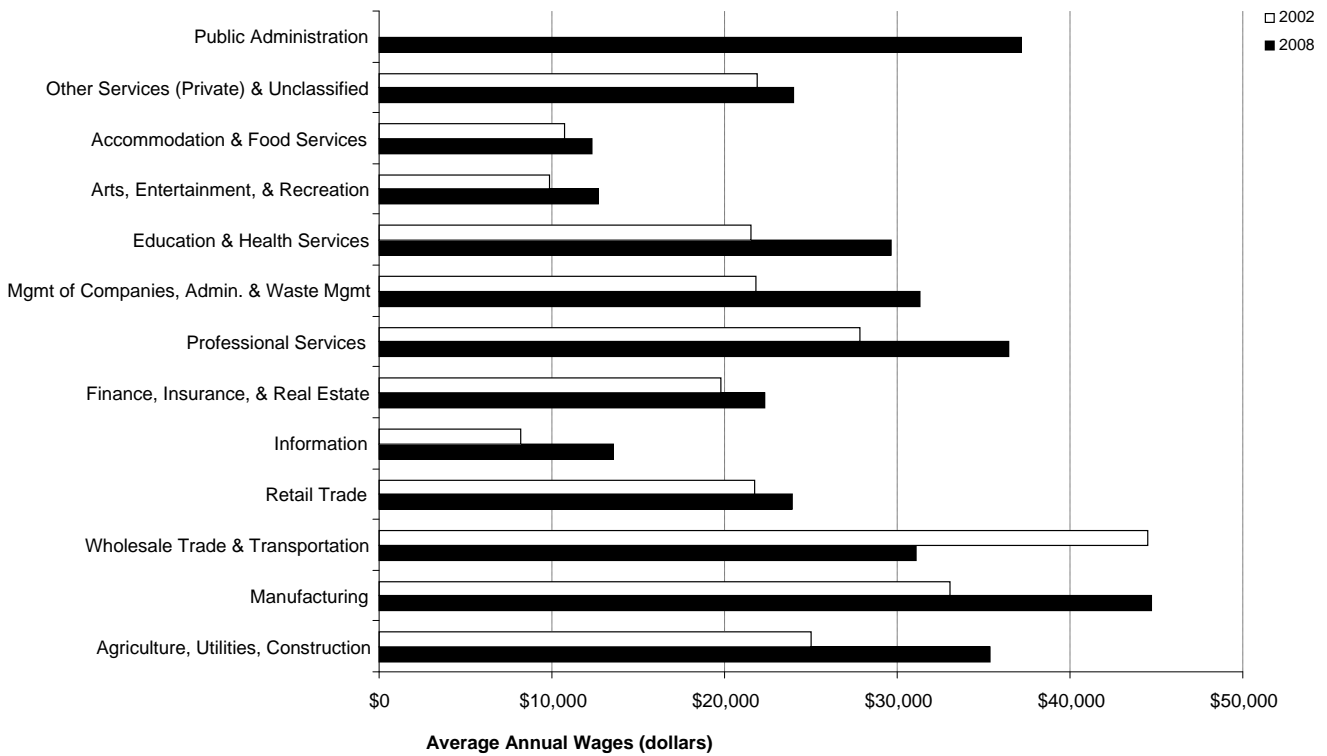
	2002	2008	change
Total Jobs	2,185	2,788	+603
Total Firms	311	383	+72
Average Annual Wages	\$20,654	\$26,340	+5,687



Total Firms



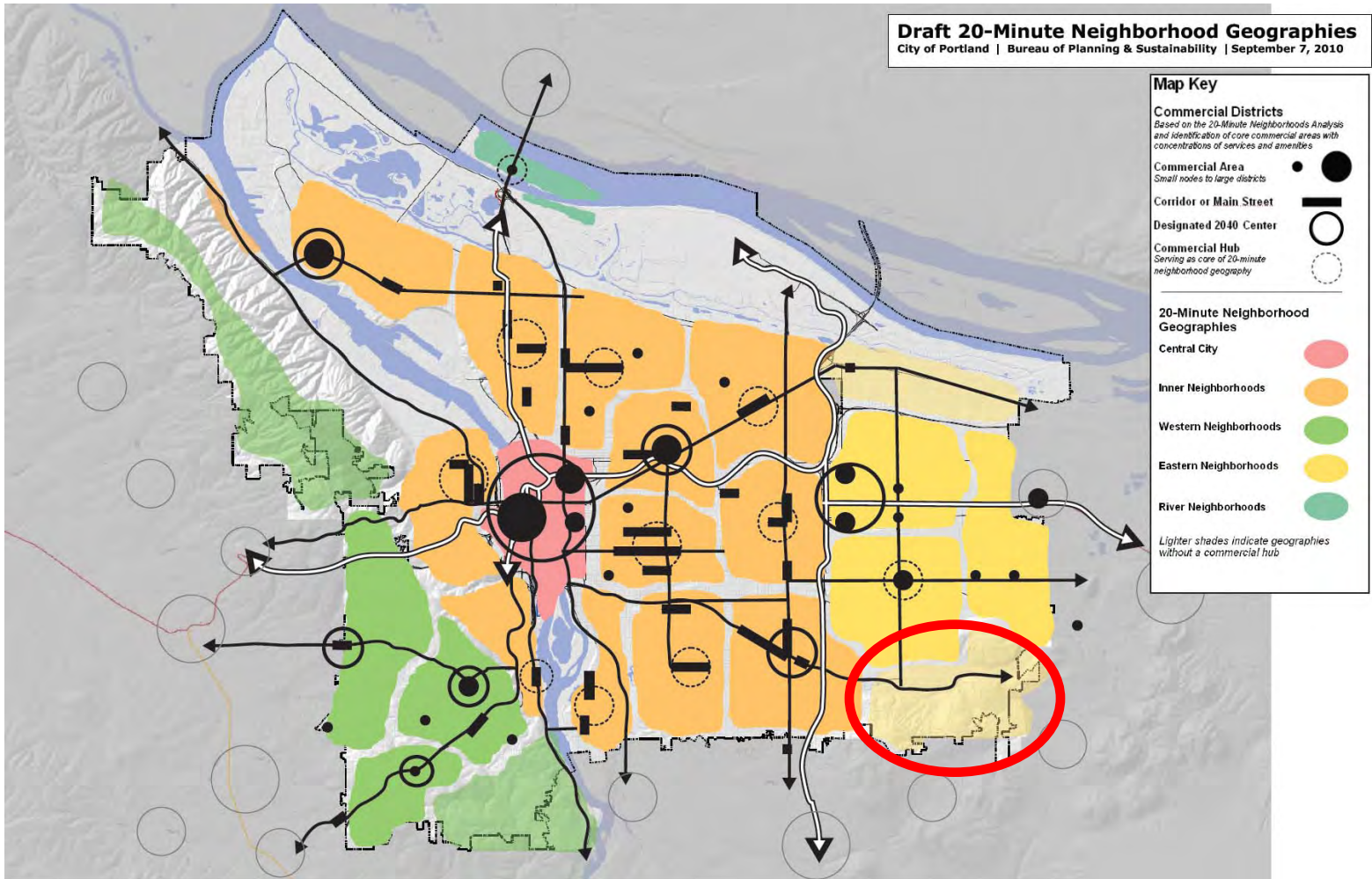
Average Annual Wages



Pleasant Valley Analysis Area

Including Pleasant Valley and part of the Powellhurst-Gilbert neighborhood

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Pleasant Valley Analysis Area

Services and Amenities

Population: 11,800 people (3,800 households)
Land Area: 5.2 sq. miles (2,300 people per sq. mile)

Commercial Districts

The area has no major concentrations of commercial services.

Grocery stores: None

Community Amenities

Community Centers: None

Libraries: None

Parks and Open Spaces: 1,301 acres – including Powell Butte Nature Park, Leach Botanical Garden, Gilbert Primary Park, Clatsop Butte Park, and the Buttes Natural Area.

Tree Canopy Coverage: 53%

Public Schools: 2 K-8 schools (Gilbert Park Elementary and Alice Ott Middle School)

Colleges (campus): 1 specialized (Birthingway College of Midwifery)

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: None

Walkable Access Score: 15 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

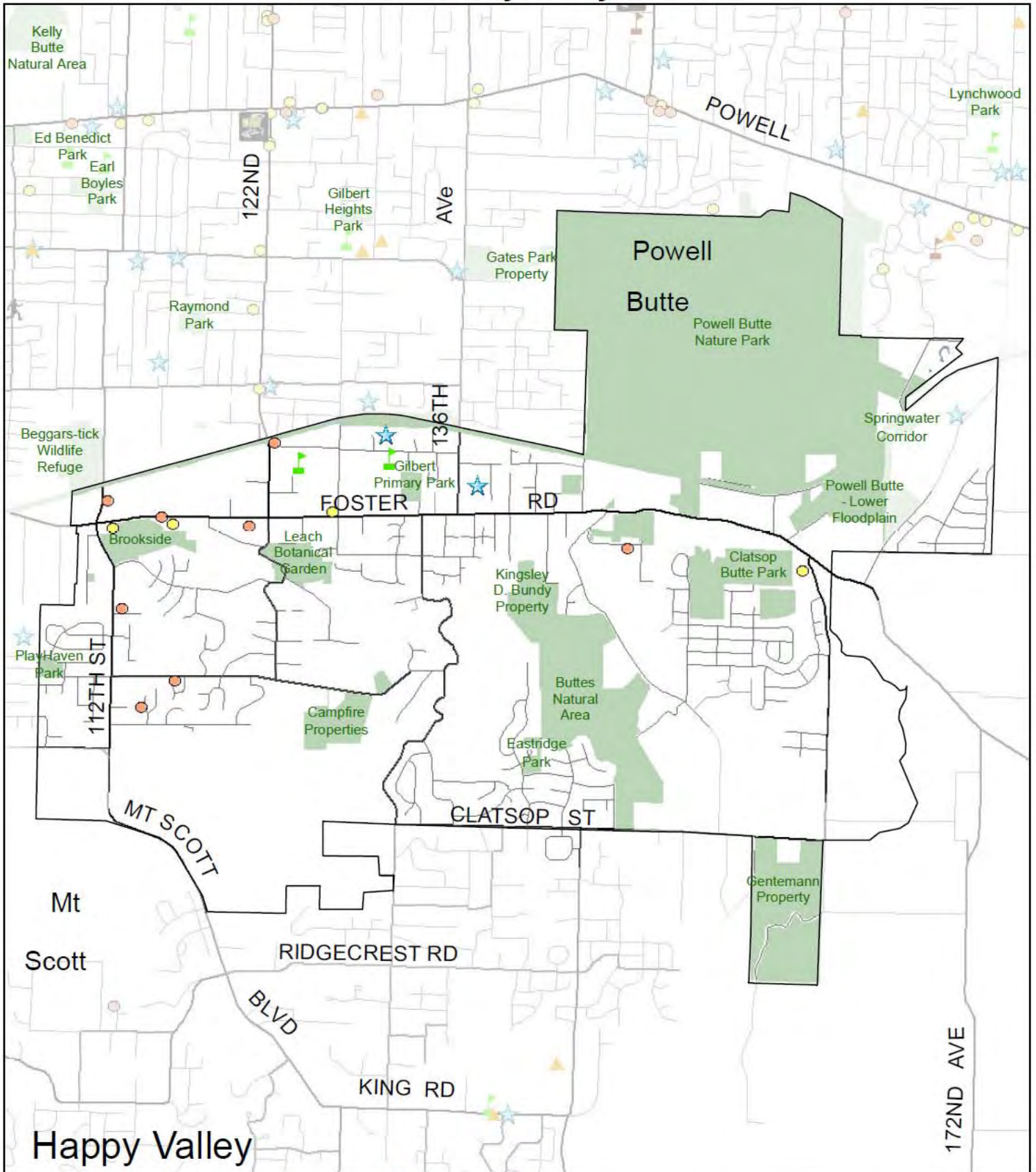
Within 1/2 mile of a park:	59%
Within 1/2 mile of a public elementary school:	11%
Within 3 miles of a full-service community center:	35%
Within 1/2 mile of a full-service grocery store:	0%
Within 1/4 mile of a frequent service transit stop:	0%

Neighborhood and Business Associations

Neighborhood Associations: Pleasant Valley and part of Powellhurst-Gilbert

Business Associations: Foster Area Business Association

Pleasant Valley Analysis Area

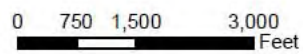


Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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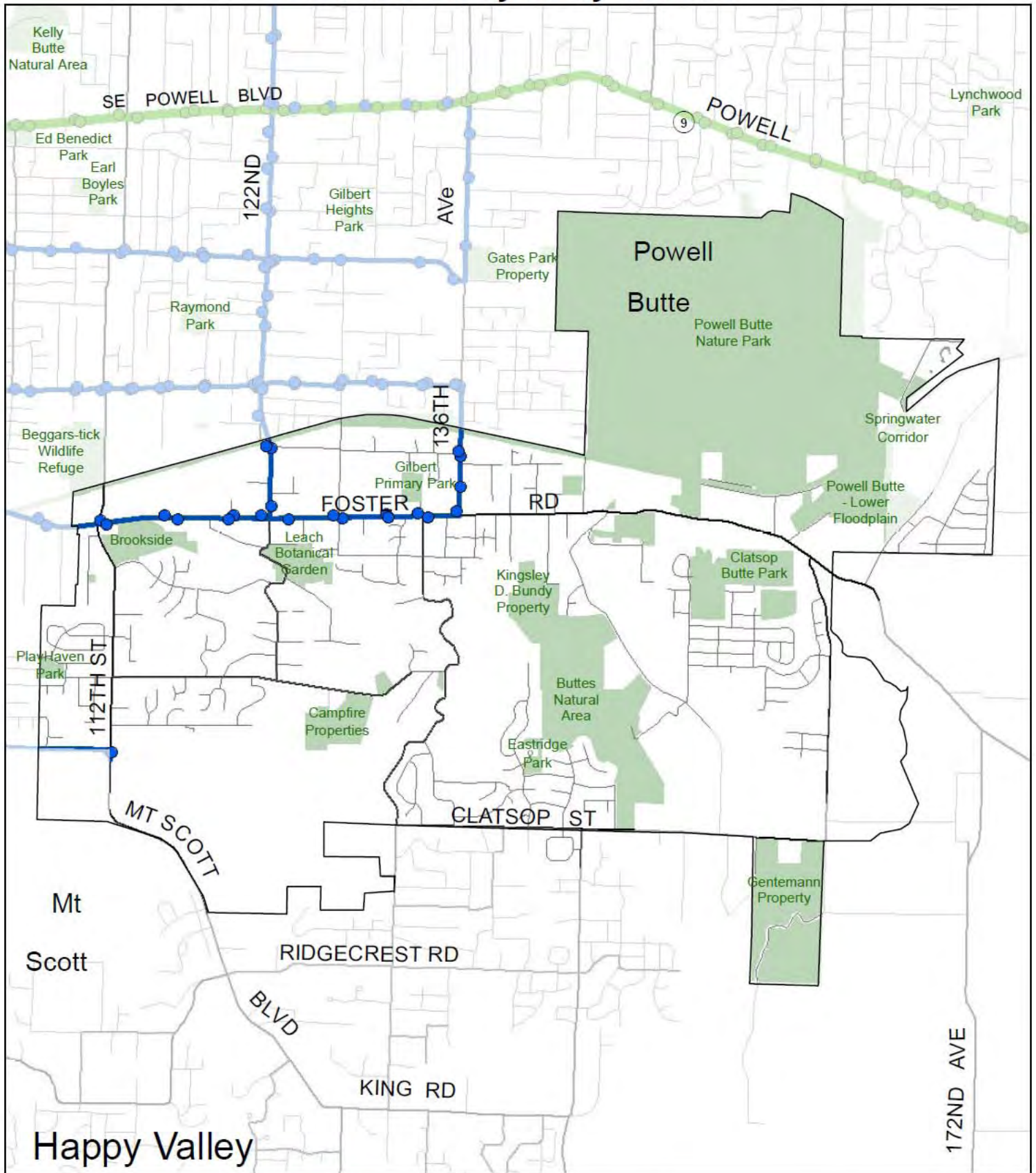


March 25, 2011


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commercial data from InfoUSA 2008

Pleasant Valley Analysis Area



Transit Infrastructure

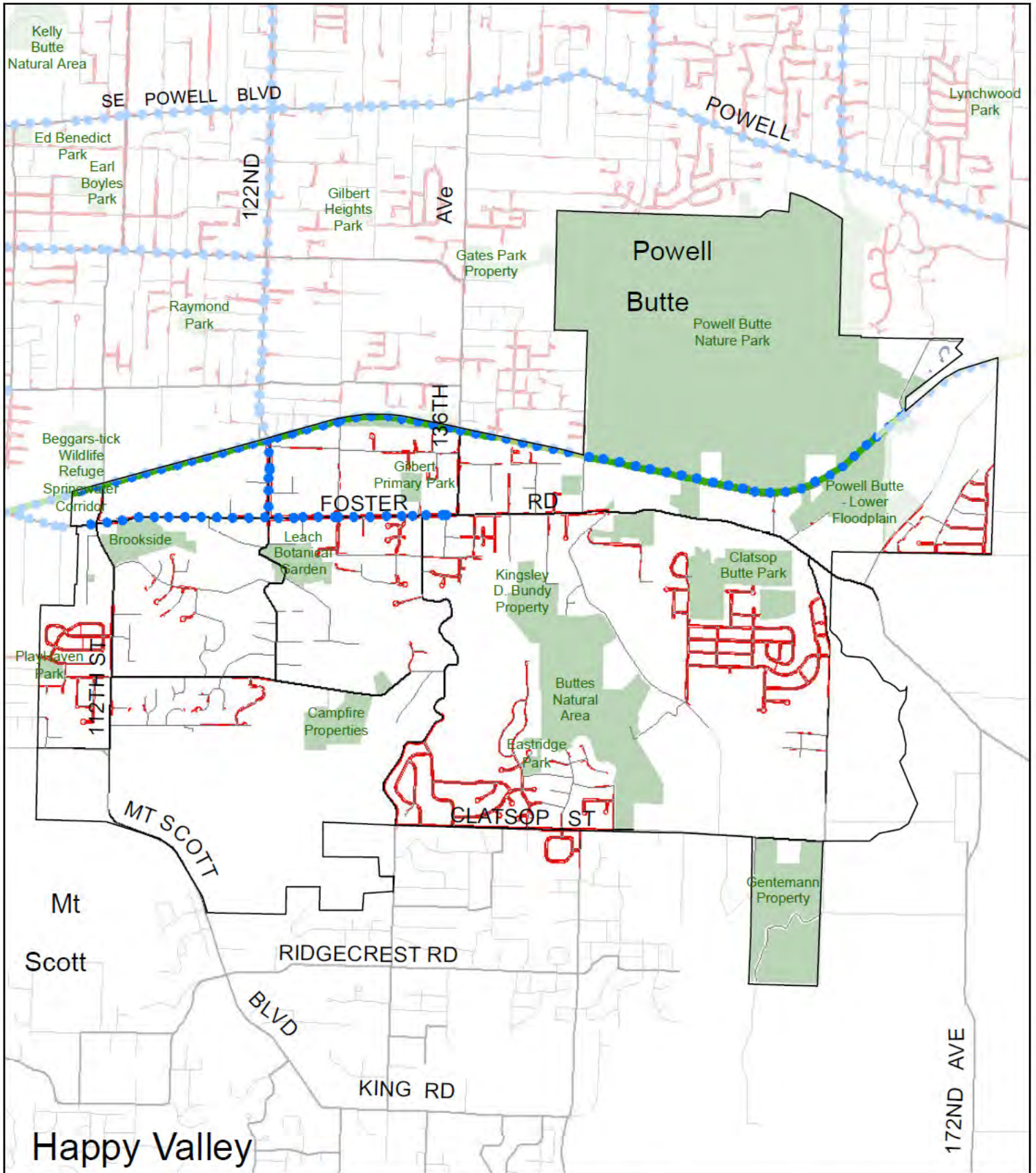
-  MAX
-  Streetcar
-  Frequent Service
-  Standard Service
-  Rush-Hour Only Service



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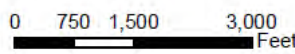
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Pleasant Valley Analysis Area



Sidewalks and Bicycle Infrastructure

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Pleasant Valley Analysis Area

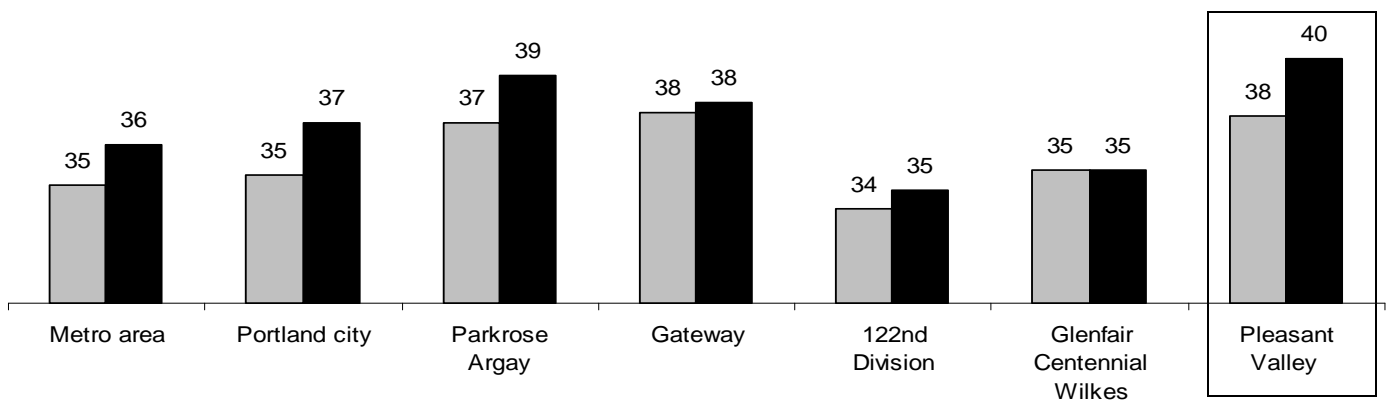
Demographics (2000 – 2010)

Population

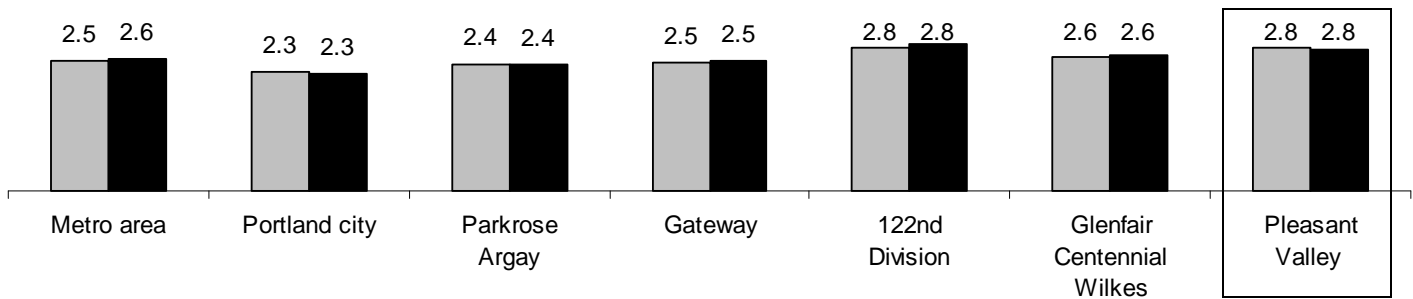
	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	2,226,000	589,000	30,931	14,703	28,498	40,102	31,343	11,809
2000	1,927,881	529,121	19,202	13,173	25,750	32,630	27,509	7,405
% change	12.9%	10.6%	61.1%	11.6%	10.7%	22.9%	13.9%	59.5%

■ 2000 ■ 2010

Median Age

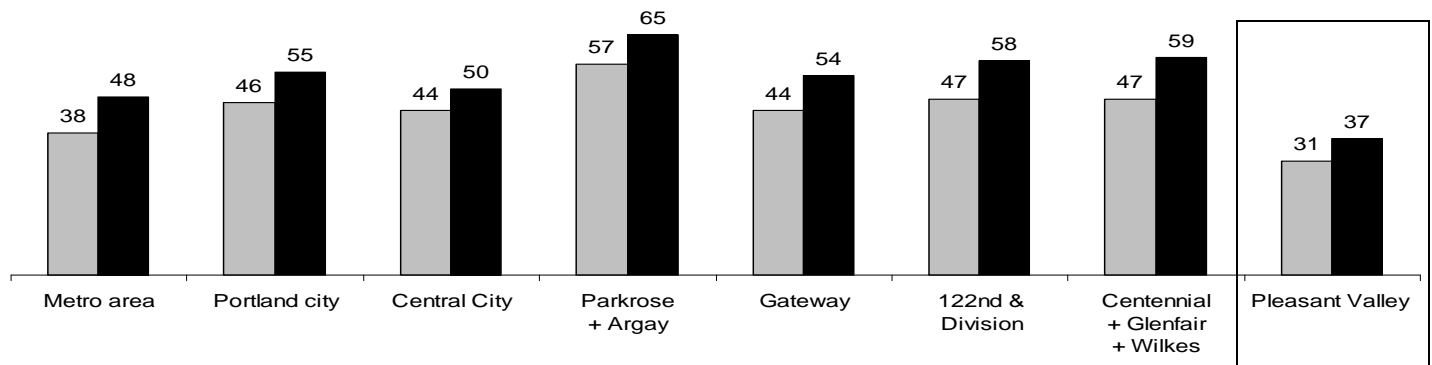


Average Household Size

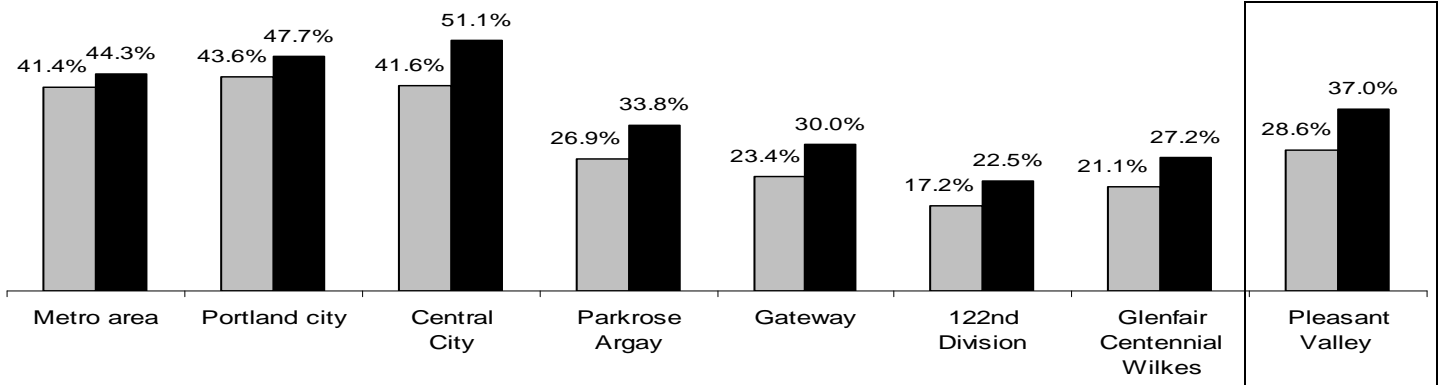


Diversity Index

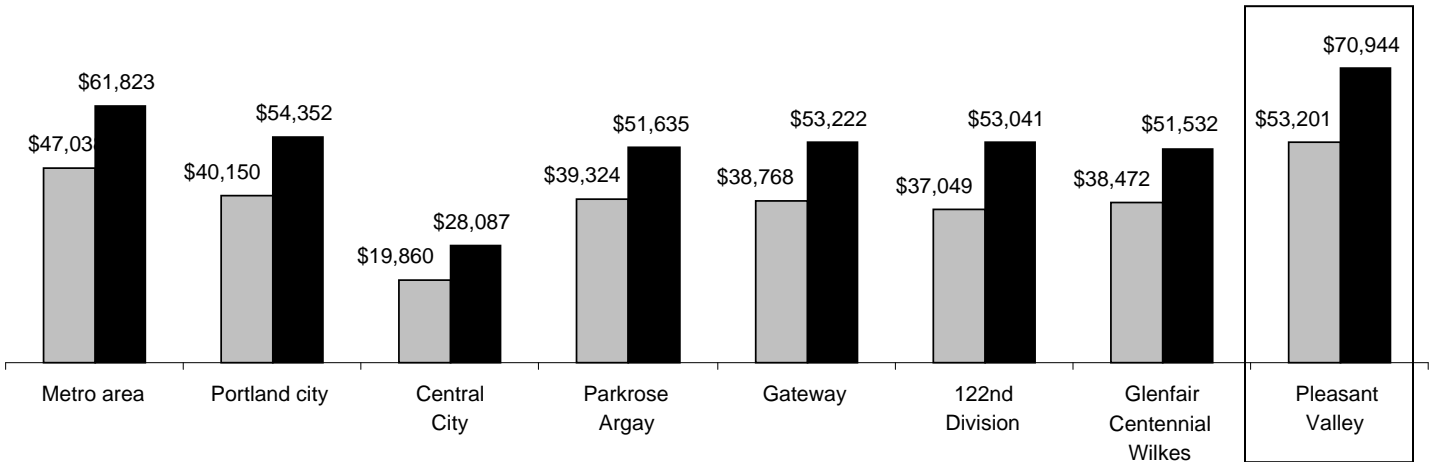
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



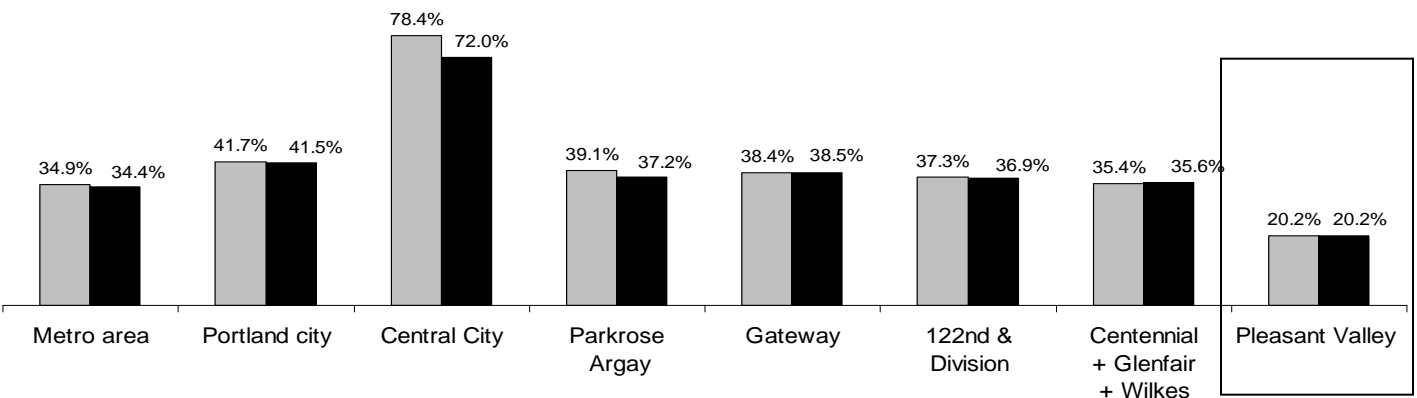
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Parkrose Argay	Gateway	122nd Division	Glenfair Centennial Wilkes	Pleasant Valley
2010	273,500	253,184	400,314	\$270,425	\$228,955	208,480	229,875	\$303,102
2000	168,347	154,721	250,566	\$163,771	\$143,033	133,205	143,259	\$177,778
% change	62.5%	63.6%	59.8%	65.1%	60.1%	56.5%	60.5%	70.5%

Percent of Renters of Occupied Housing Units



Pleasant Valley Analysis Area

Commercial Real Estate Indicators

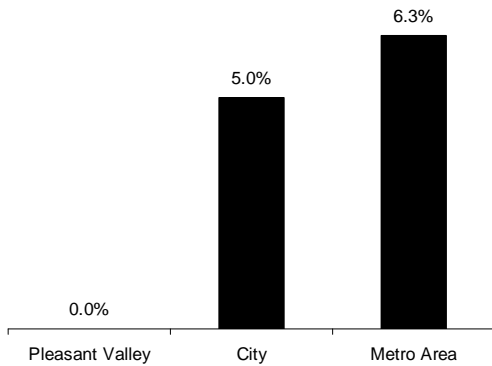
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

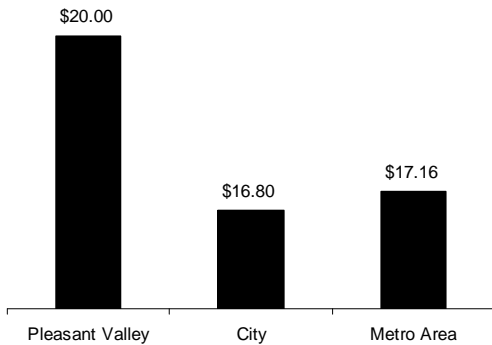
Square Feet

Pleasant Vly	City	Metro Area
28,124	51,937,895	107,875,146

Retail Vacancy



Retail Rents

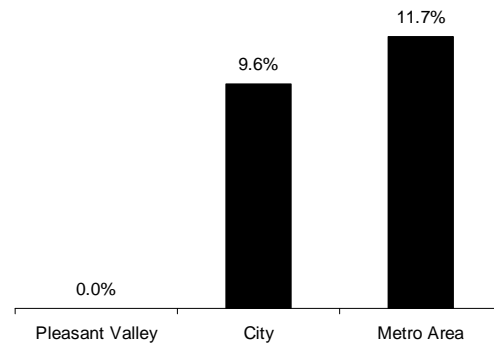


OFFICE SPACE

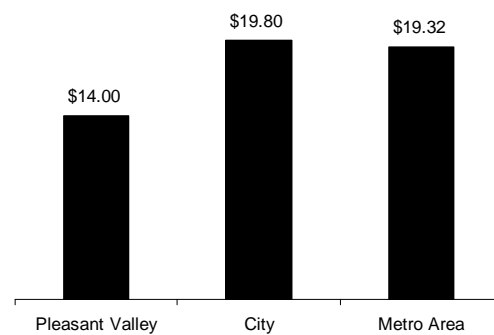
Square Feet

Pleasant Vly	City	Metro Area
26,509	54,348,765	92,465,455

Office Vacancy



Office Rents



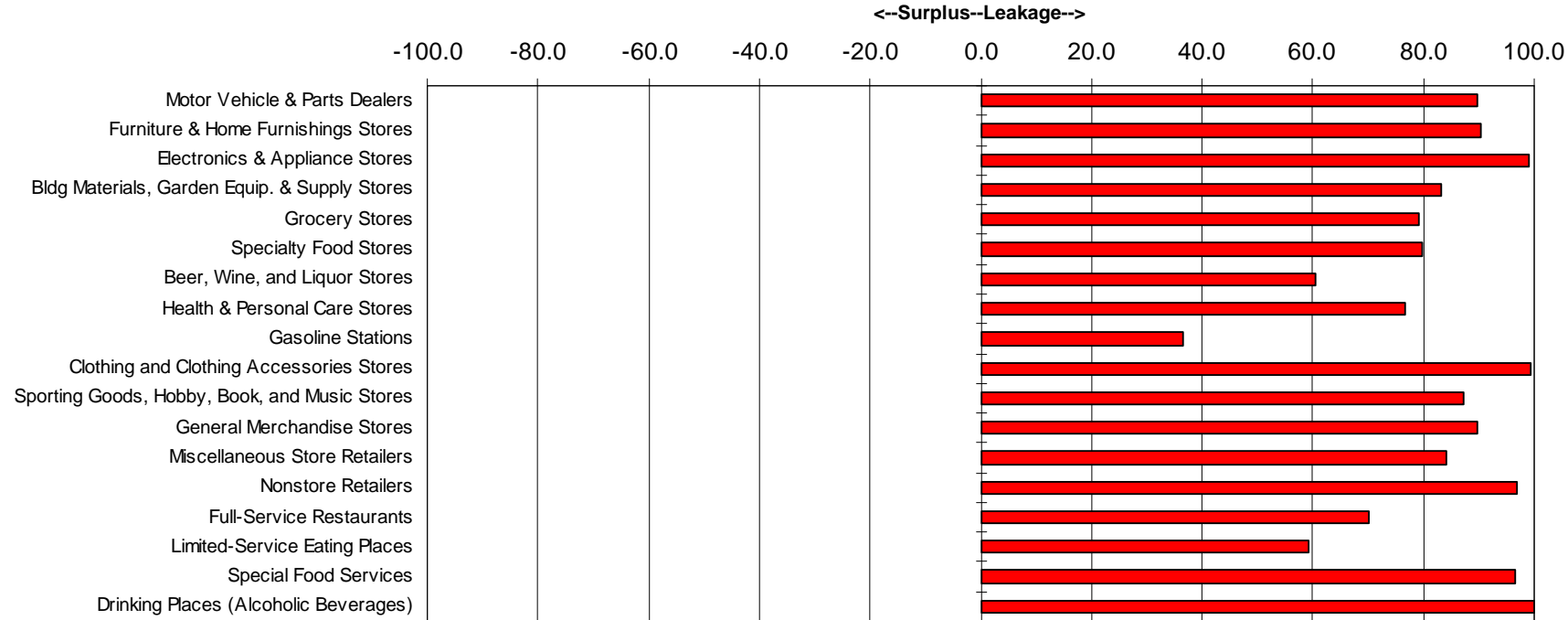
Pleasant Valley Analysis Area

Retail Market Profile

Retail Gap = \$91 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$104,047,654	\$13,479,171	\$90,568,483	77.1	21
Total Retail Trade (NAICS 44-45)	\$88,876,363	\$10,831,554	\$78,044,809	78.3	16
Total Food & Drink (NAICS 722)	\$15,171,291	\$2,647,617	\$12,523,674	70.3	5

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Pleasant Valley Analysis Area

Employment

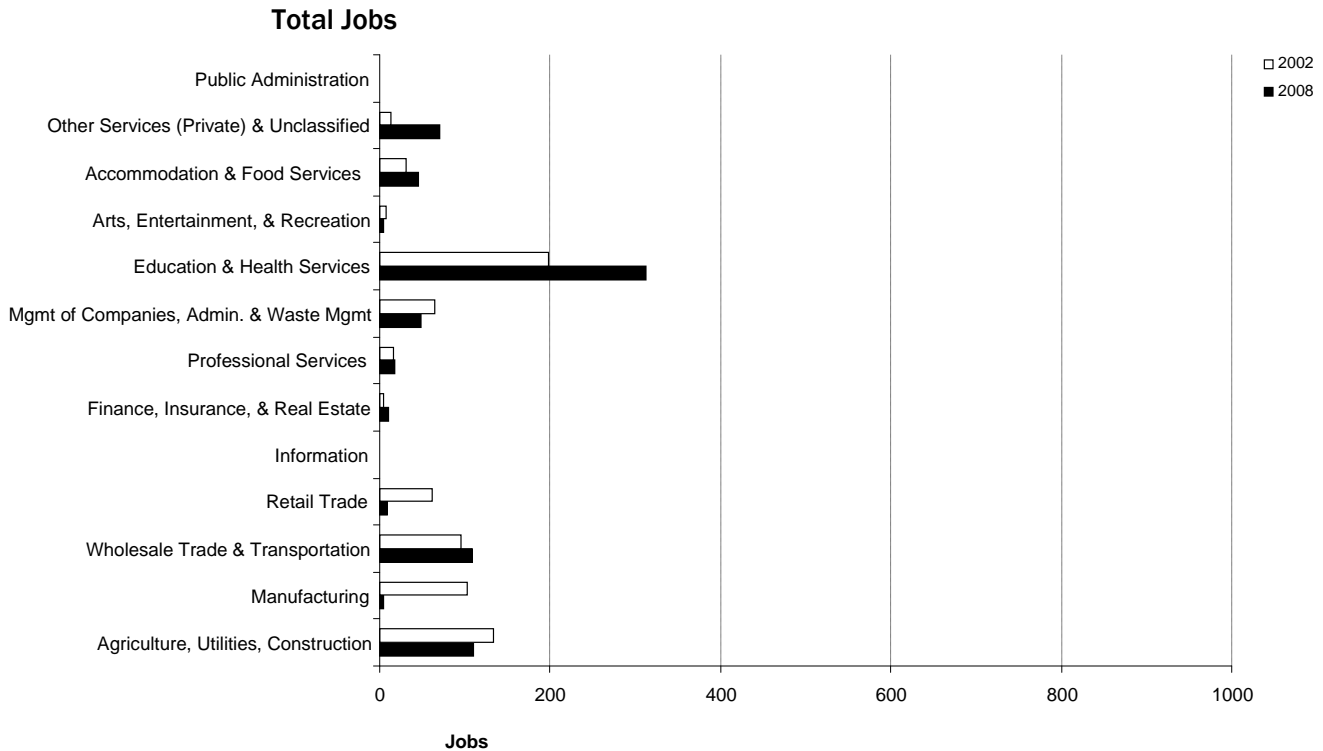
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

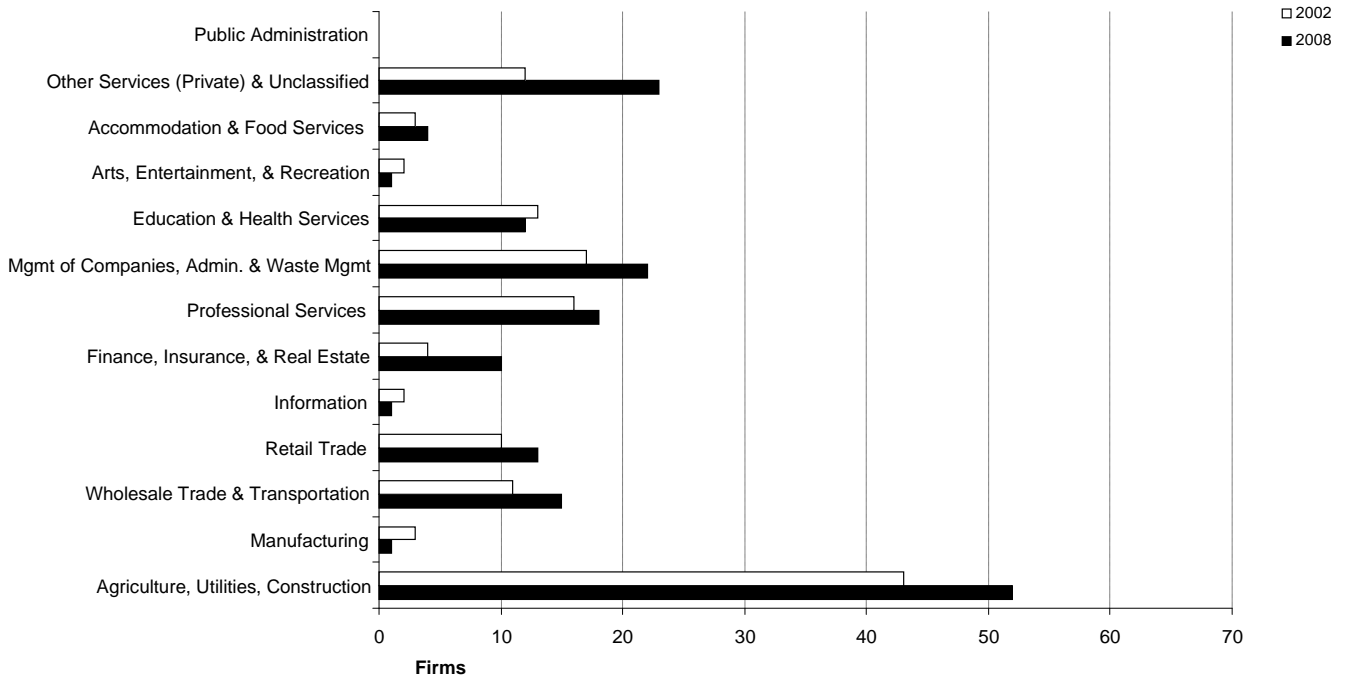
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

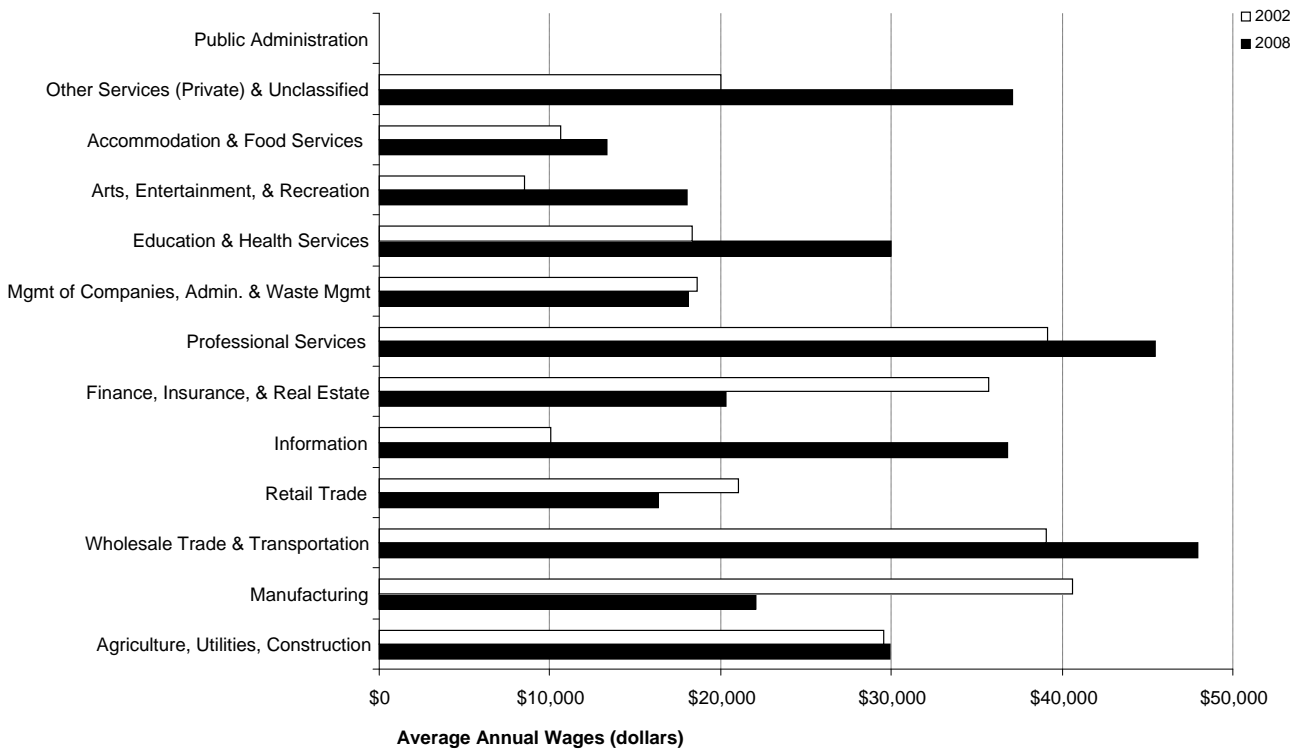
	2002	2008	change
Total Jobs	729	744	+15
Total Firms	136	172	+36
Average Annual Wages	\$26,640	\$30,457	+3,817



Total Firms



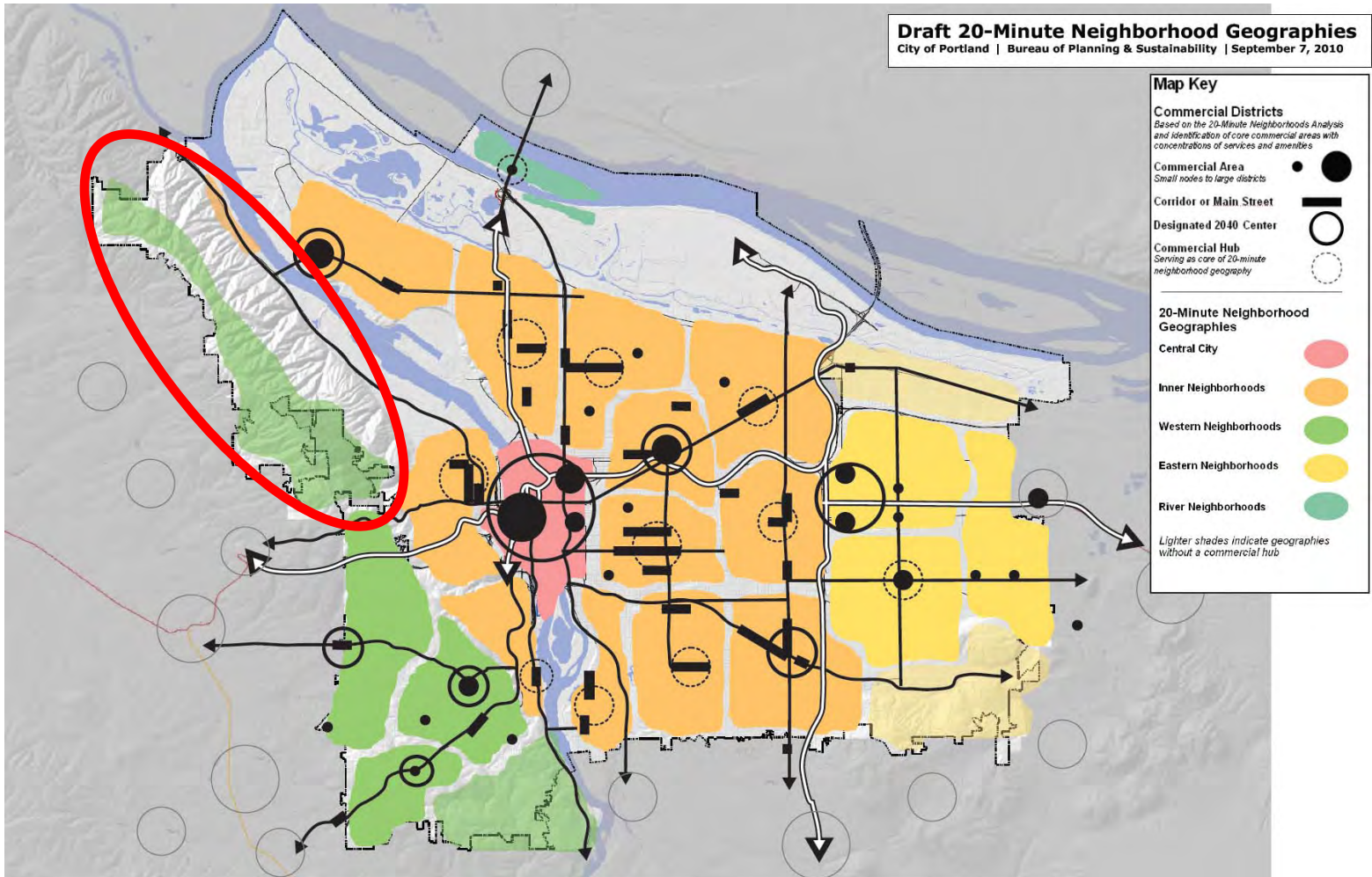
Average Annual Wages



Forest Park-Northwest Hills Analysis Area

Including Forest Park, Northwest Heights, and Linnton neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Forest Park-Northwest Hills Analysis Area

Services and Amenities

<i>Population: 8,400 people (3,300 households)</i> <i>Land Area: 15.9 sq. miles (500 people per sq. mile)</i>
--

Commercial Districts

The area has no major concentrations of commercial services. Nearby commercial districts include St. Johns (just to the east of the analysis area across the St. Johns Bridge), the Northwest District (at the southeast edge of the analysis area, but separated from populated areas by parkland and the West Hills), and commercial areas in Washington County.

Grocery stores: None

Community Amenities

Community Centers: None

Libraries: None

Parks and Open Spaces: 5,417 acres – including Forest Park, Linnton Park, Forest Heights Park, Macleay Park, and Alder Ridge Natural Area.

Tree Canopy Coverage: 81%

Public Schools: 1 elementary school (Forest Park Elementary)

Colleges (campus): None

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: None

Walkable Access Score: 7 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

Within 1/2 mile of a park:	6%
Within 1/2 mile of a public elementary school:	1%
Within 3 miles of a full-service community center:	0%
Within 1/2 mile of a full-service grocery store:	0%
Within 1/4 mile of a frequent service transit stop:	0%

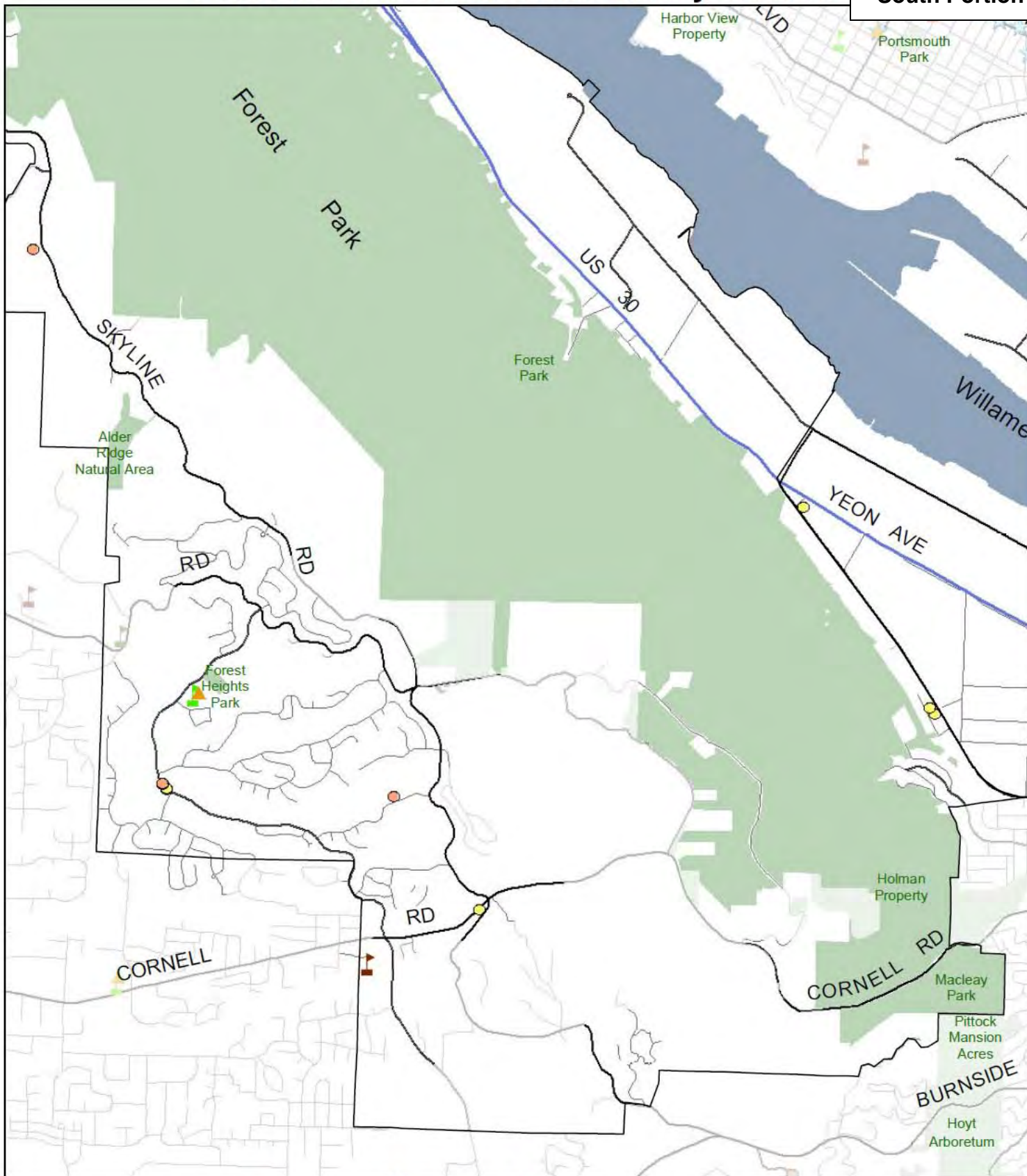
Neighborhood and Business Associations

Neighborhood Associations: Forest Park, Northwest Heights, and Linnton

Business Associations: Northwest Industrial Neighborhood Association

Forest Park-Northwest Hills Analysis Area

South Portion



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



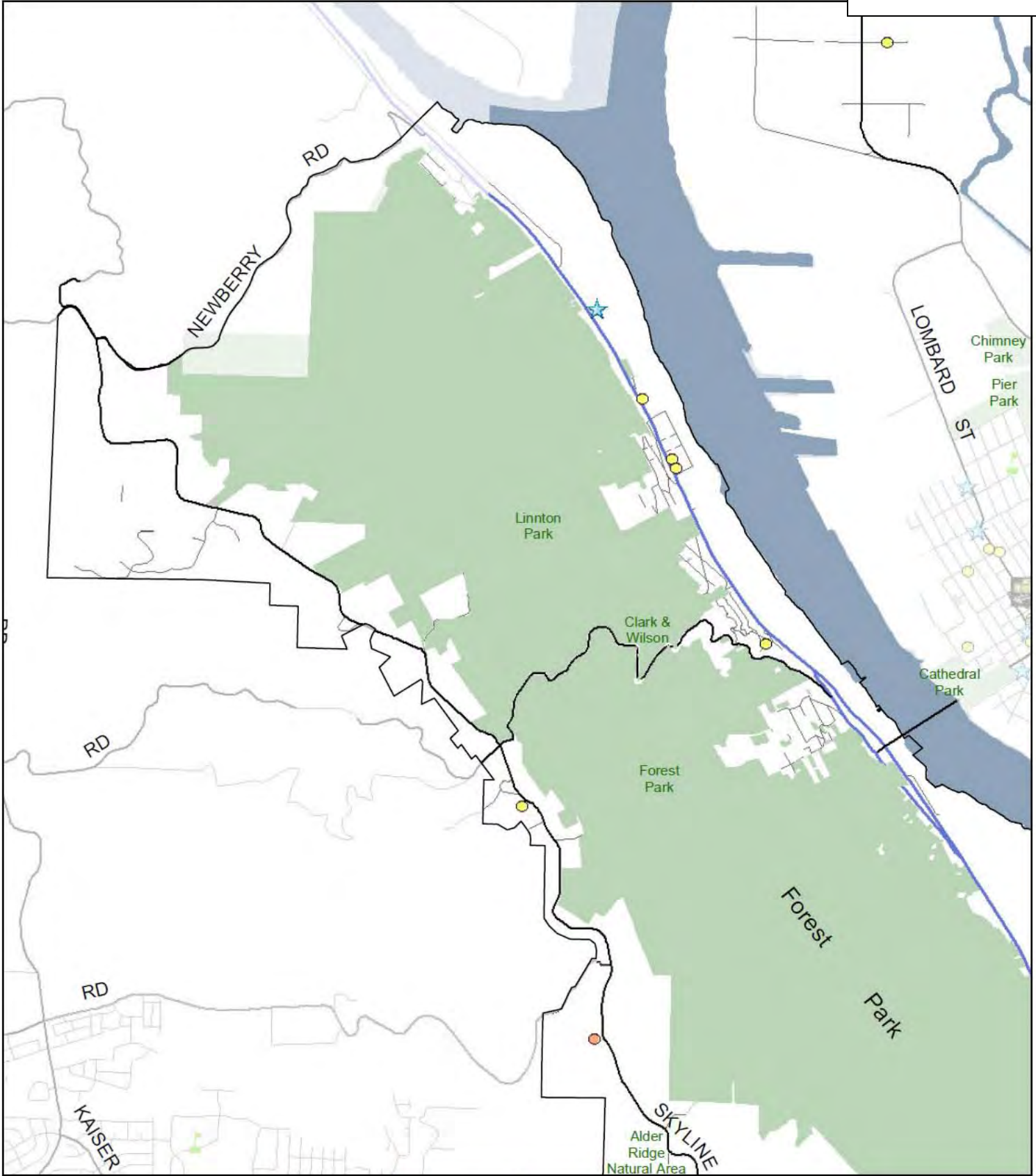
City of Portland Bureau of Planning & Sustainability
 Sam Adams, Mayor | Susan Anderson, Director



March 25, 2011

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commercial data from InfoUSA 2008

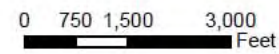


Services and Amenities

- arterials_clark_county
- Type 1 Commercial
- Type 2 Commercial
- 🚶 Fitness Centers
- 🛒 Grocery Stores
- ★ Places of Worship
- 🏠 Farmers Markets
- 📖 Libraries
- 🏠 Community Centers
- 🎓 Public HS
- 🎓 Public K-8
- 🎓 Private Schools
- 👶 Daycare Centers



City of Portland Bureau of Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director



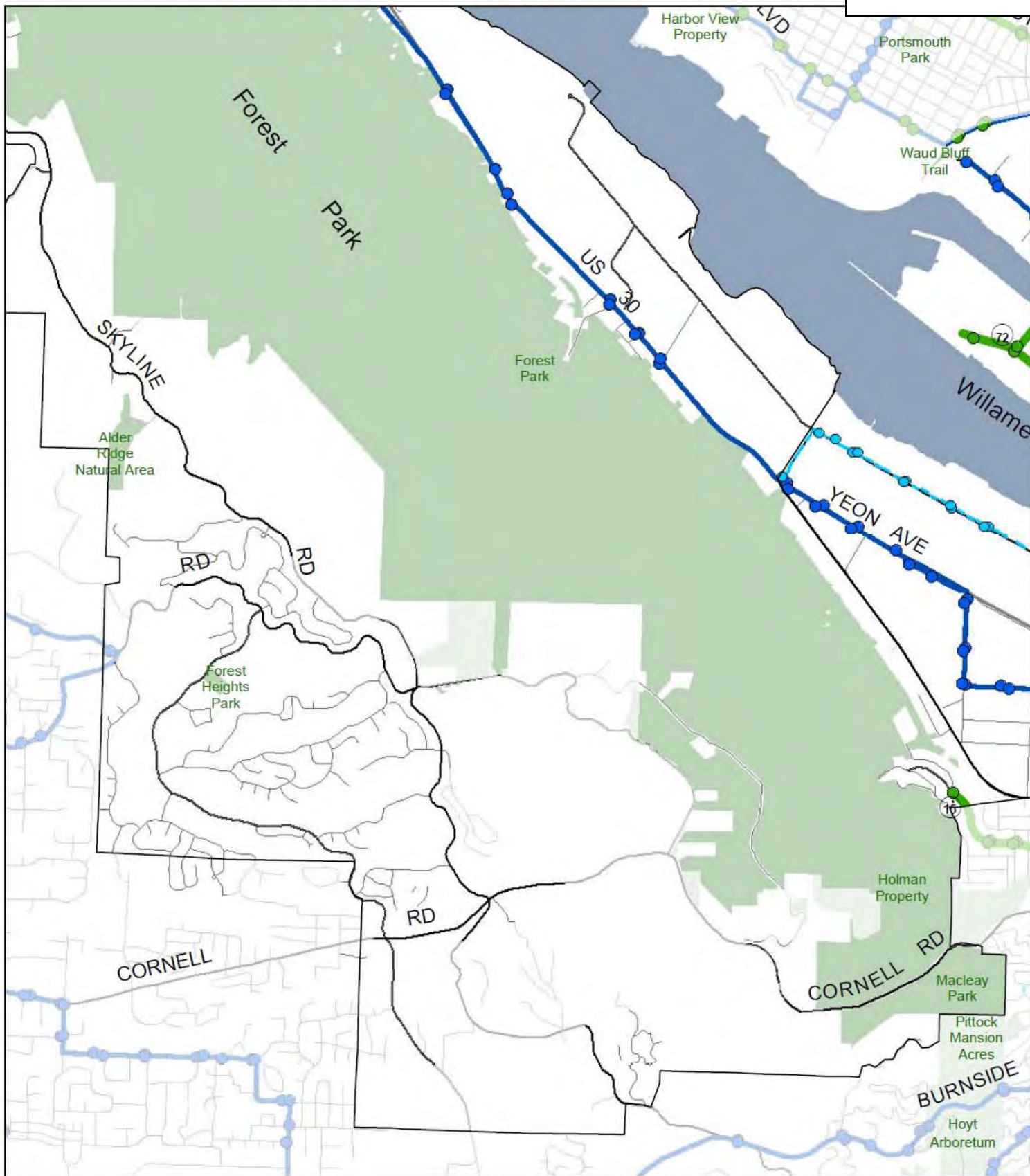
March 25, 2011

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commercial data from InfoUSA 2008

Forest Park-Northwest Hills Analysis Area

South Portion



Transit Infrastructure

-  MAX
-  Streetcar
-  Frequent Service
-  Standard Service
-  Rush-Hour Only Service



0 750 1,500 3,000 Feet



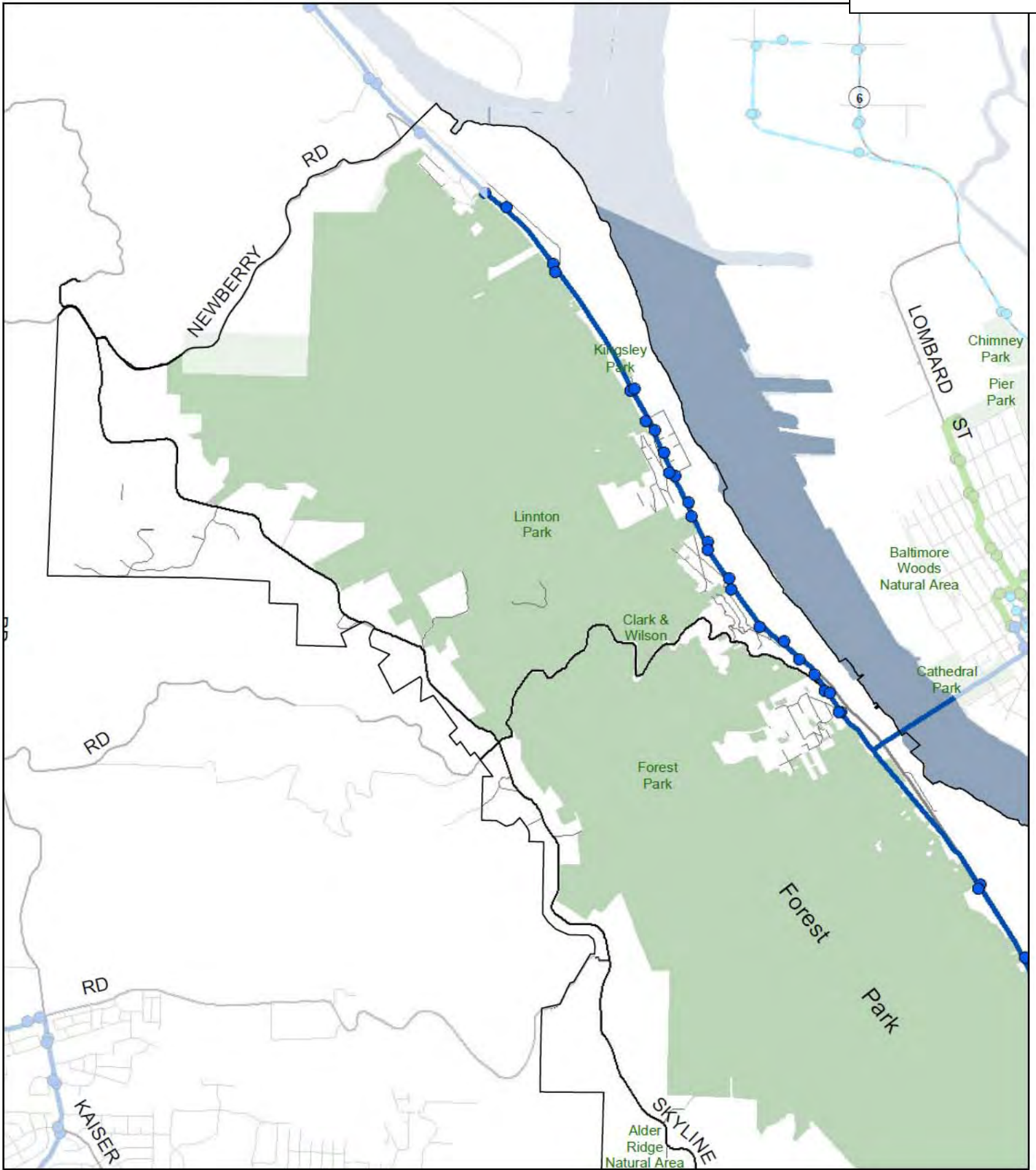
City of Portland Bureau of Planning & Sustainability
 Sam Adams, Mayor | Susan Anderson, Director

May 12, 2011





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Forest Park-Northwest Hills Analysis Area

North Portion



Transit Infrastructure

-  MAX
-  Streetcar
-  Frequent Service
-  Standard Service
-  Rush-Hour Only Service



0 750 1,500 3,000 Feet



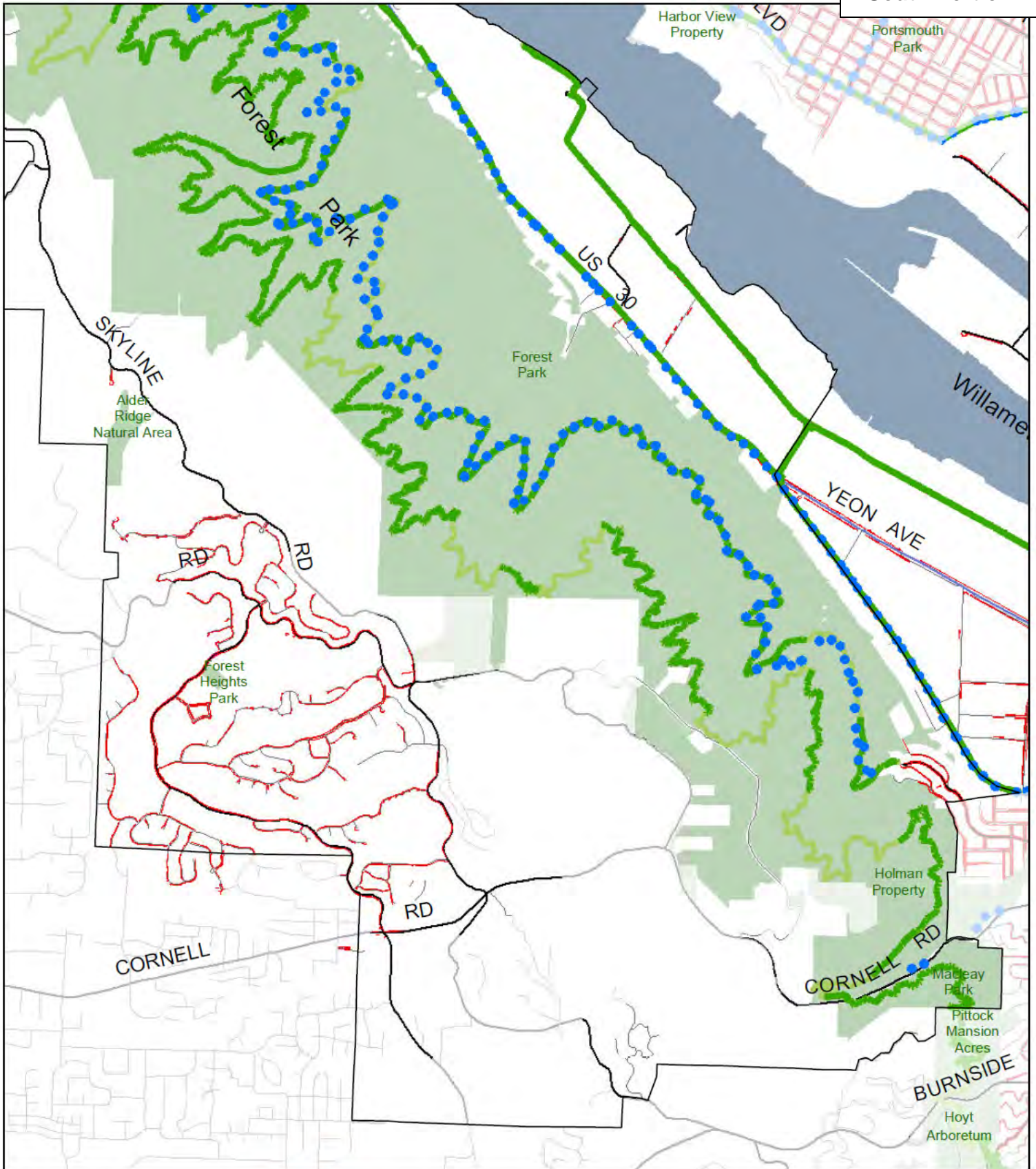
City of Portland Bureau of Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director

May 12, 2011

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Forest Park-Northwest Hills Analysis Area

South Portion



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



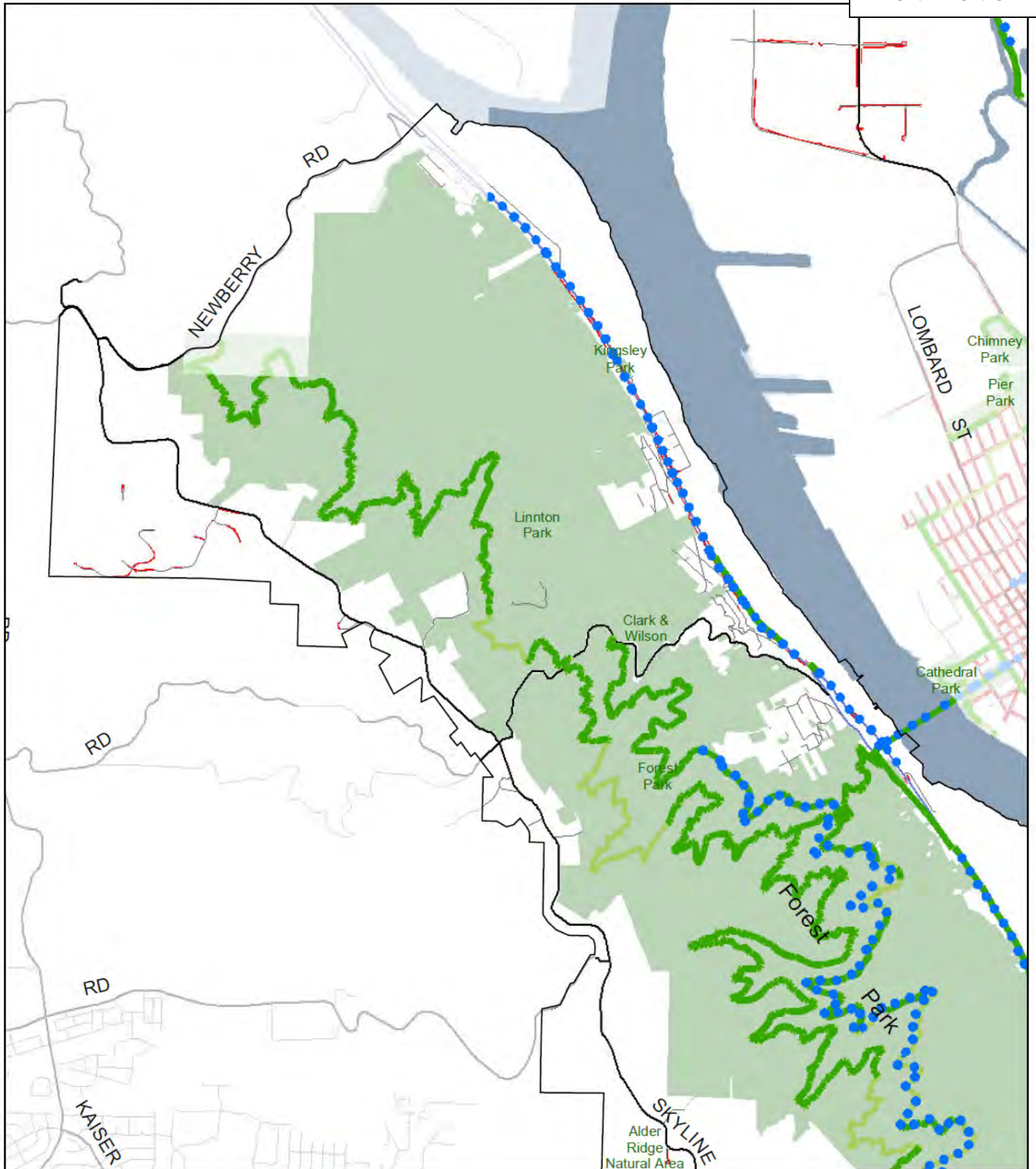
0 750 1,500 3,000 Feet



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March 25, 2011

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Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



0 750 1,500 3,000 Feet



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March 25, 2011

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Forest Park-Northwest Hills Analysis Area

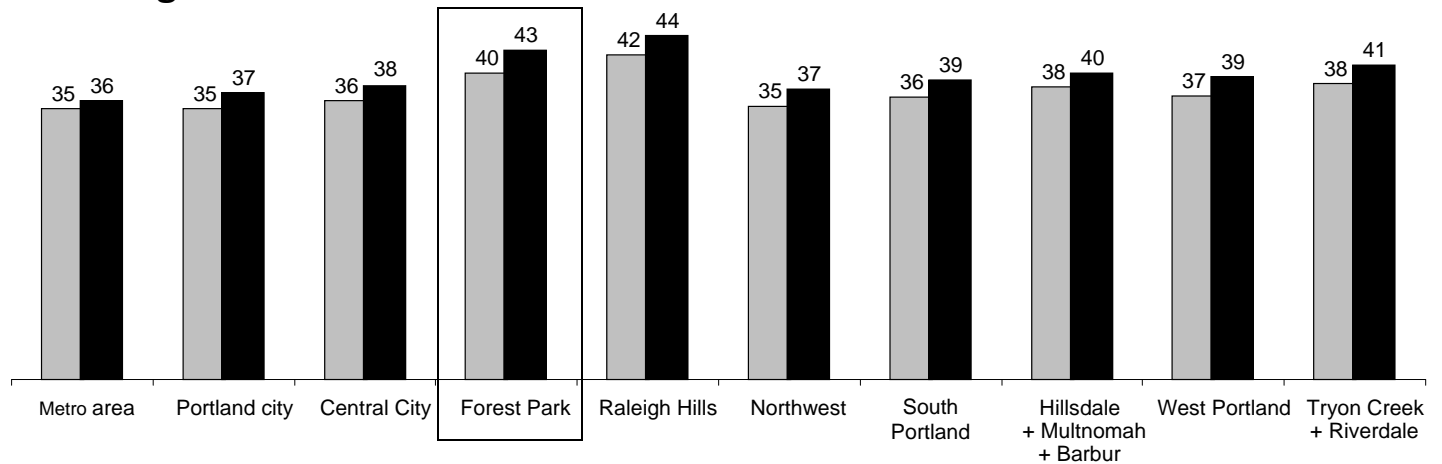
Demographics (2000 – 2010)

Population

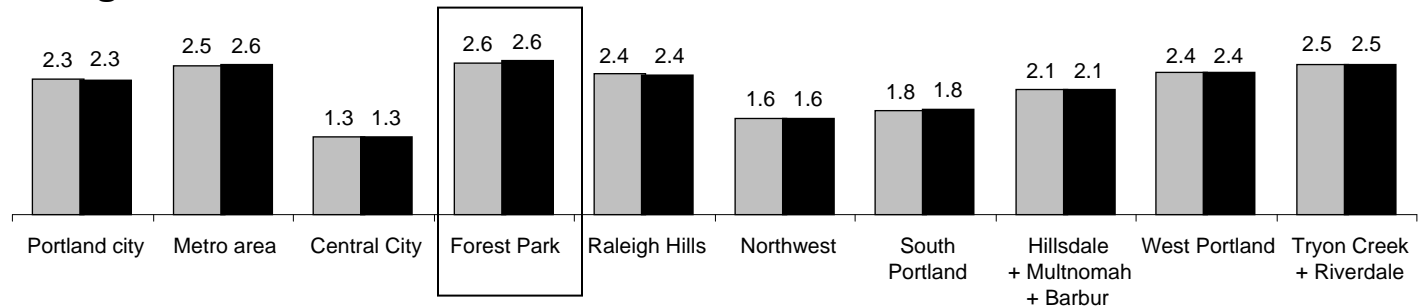
	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	2,226,000	585,000	30,931	8,424	15,446	21,794	8,560	19,601	10,836	9,668
2000	1,927,881	529,121	19,202	5,279	15,485	20,014	8,136	18,674	10,481	8,884
% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

■ 2000 ■ 2010

Median Age

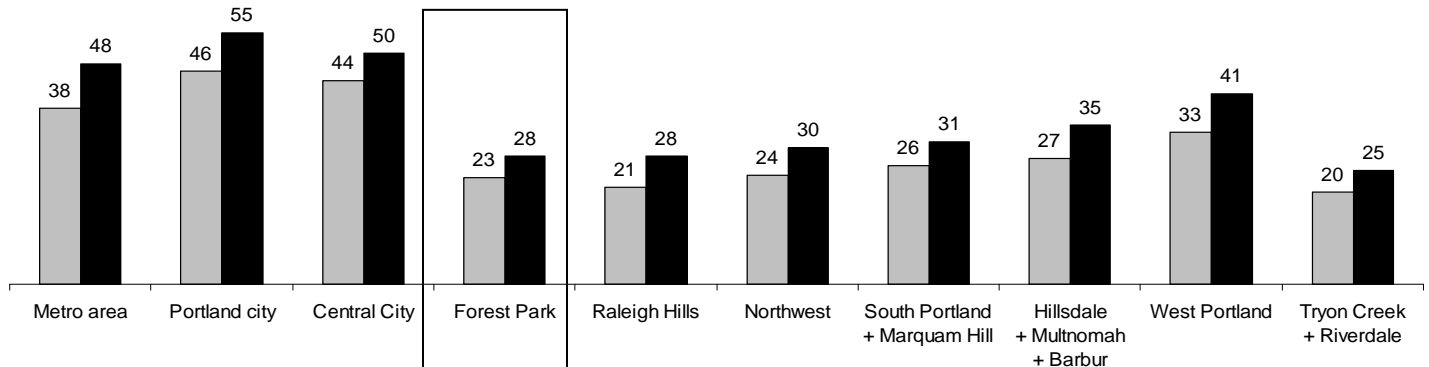


Average Household Size

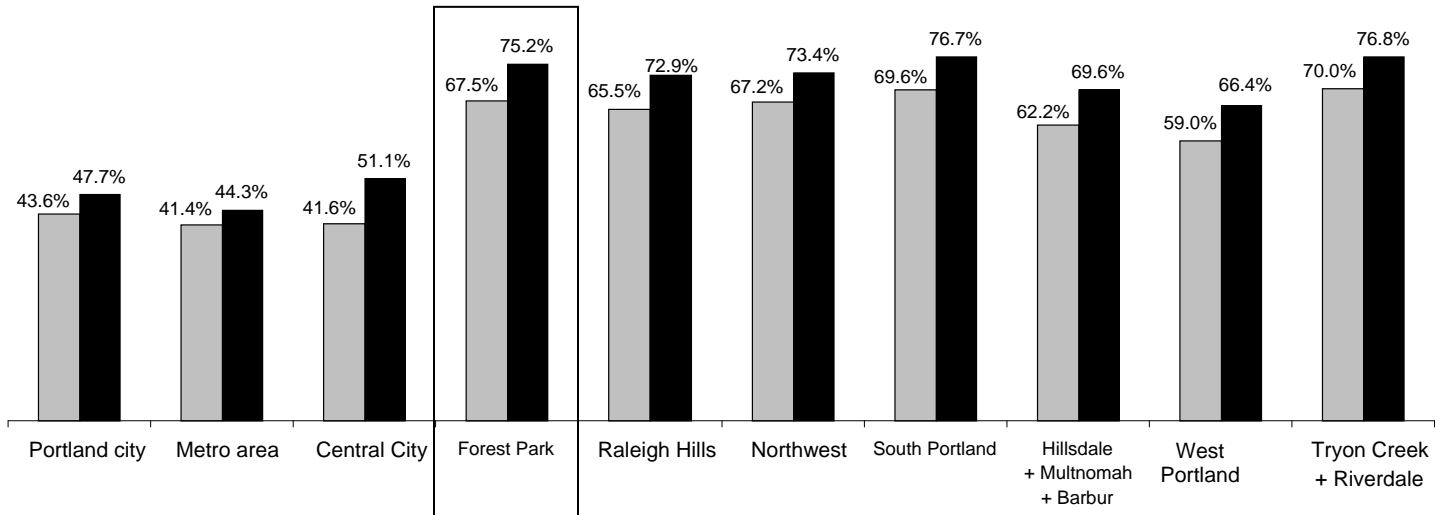


Diversity Index

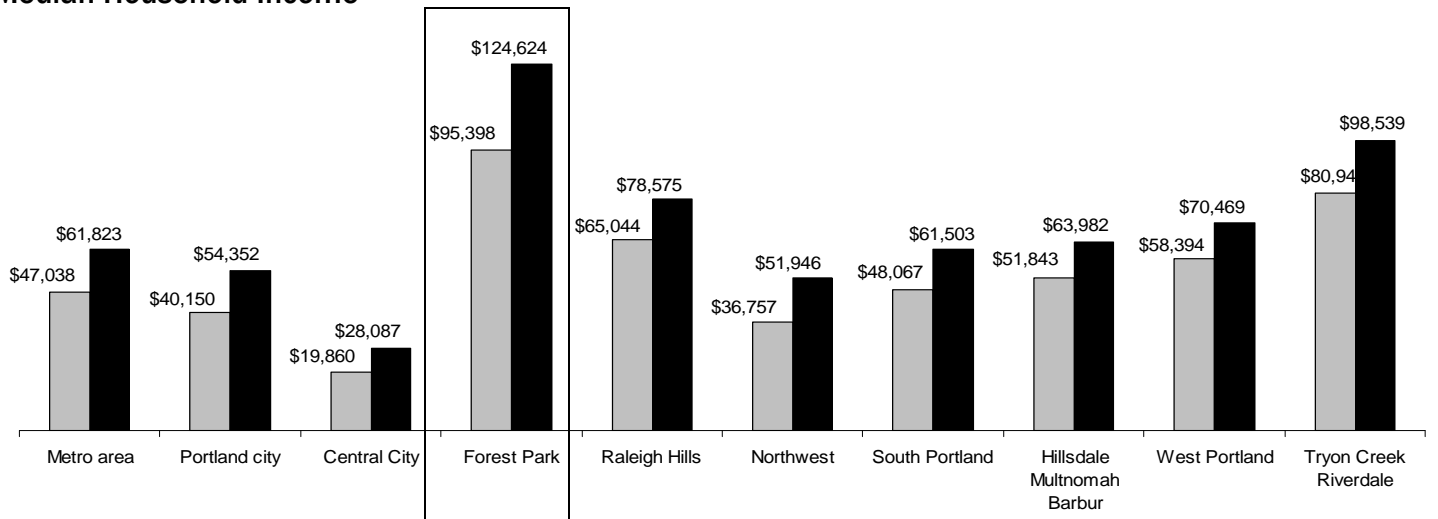
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



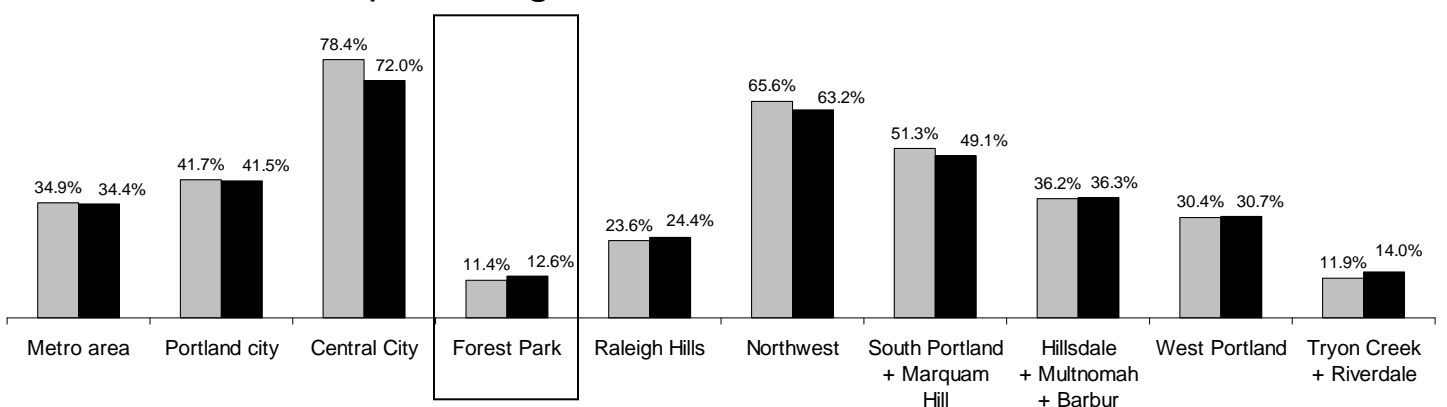
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



Forest Park-Northwest Hills Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

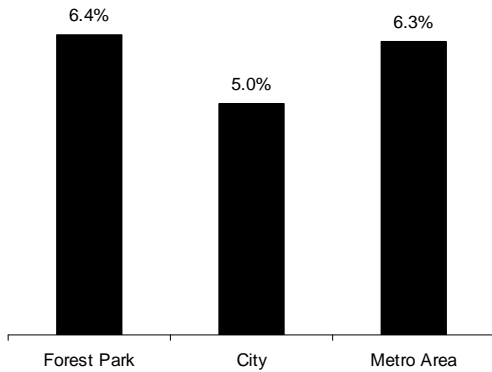
Forest Park	City	Metro Area
35,154	51,937,895	107,875,146

OFFICE SPACE

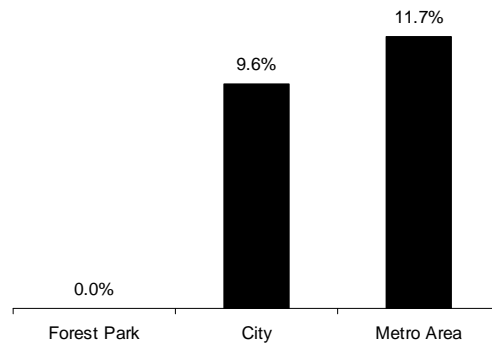
Square Feet

Forest Park	City	Metro Area
74,818	54,348,765	92,465,455

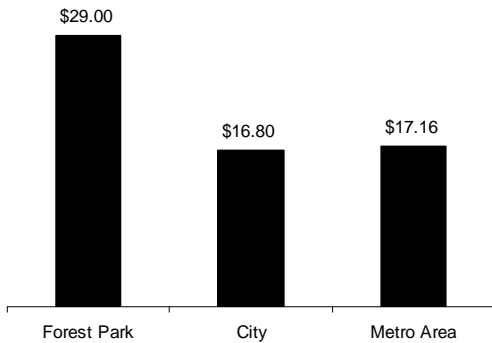
Retail Vacancy



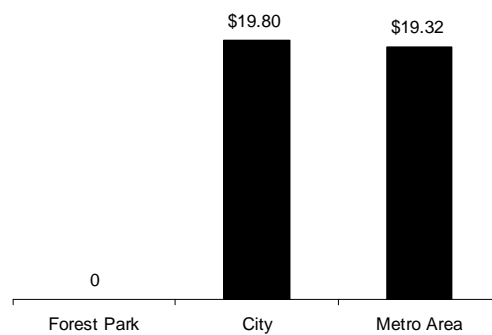
Office Vacancy



Retail Rents



Office Rents



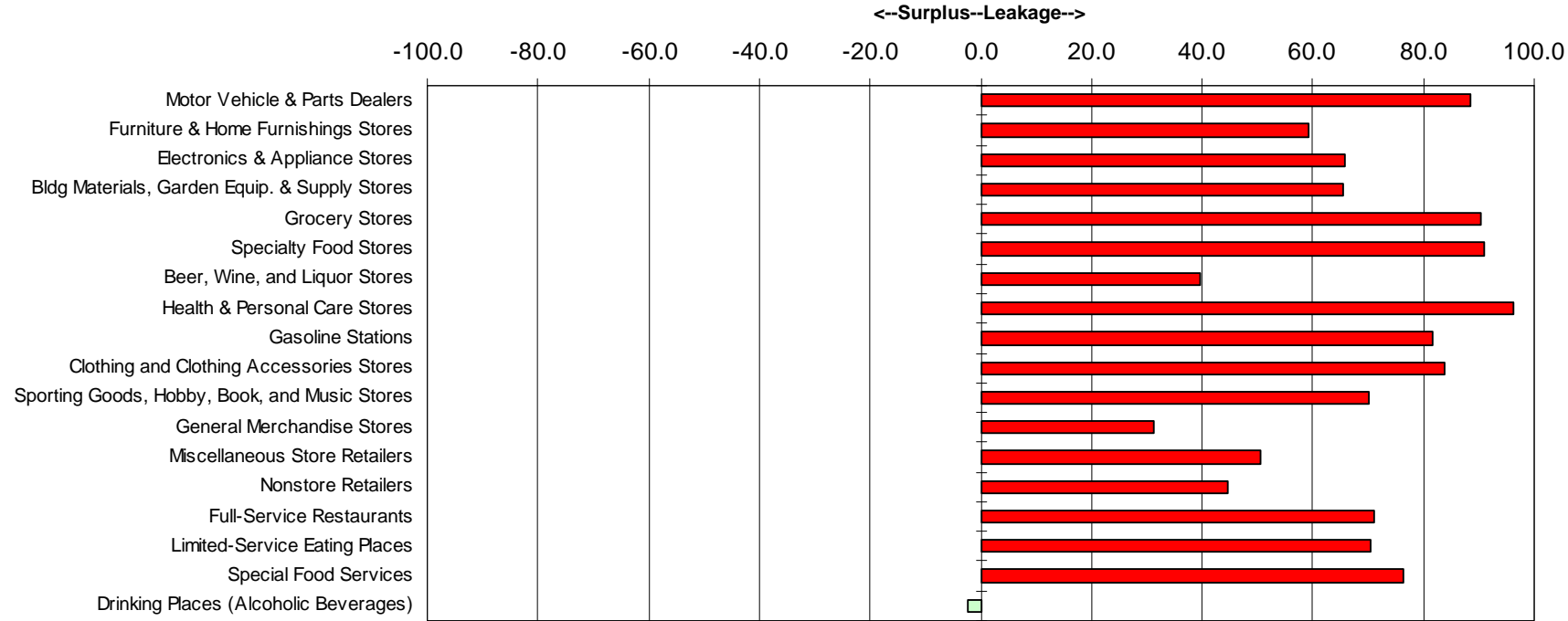
Forest Park-Northwest Hills Analysis Area

Retail Market Profile

Retail Gap = \$155 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$190,106,383	\$34,802,980	\$155,303,403	69.1	37
Total Retail Trade (NAICS 44-45)	\$162,481,865	\$27,567,805	\$134,914,060	71.0	28
Total Food & Drink (NAICS 722)	\$27,624,518	\$7,235,175	\$20,389,343	58.5	9

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Forest Park-Northwest Hills Analysis Area

Employment

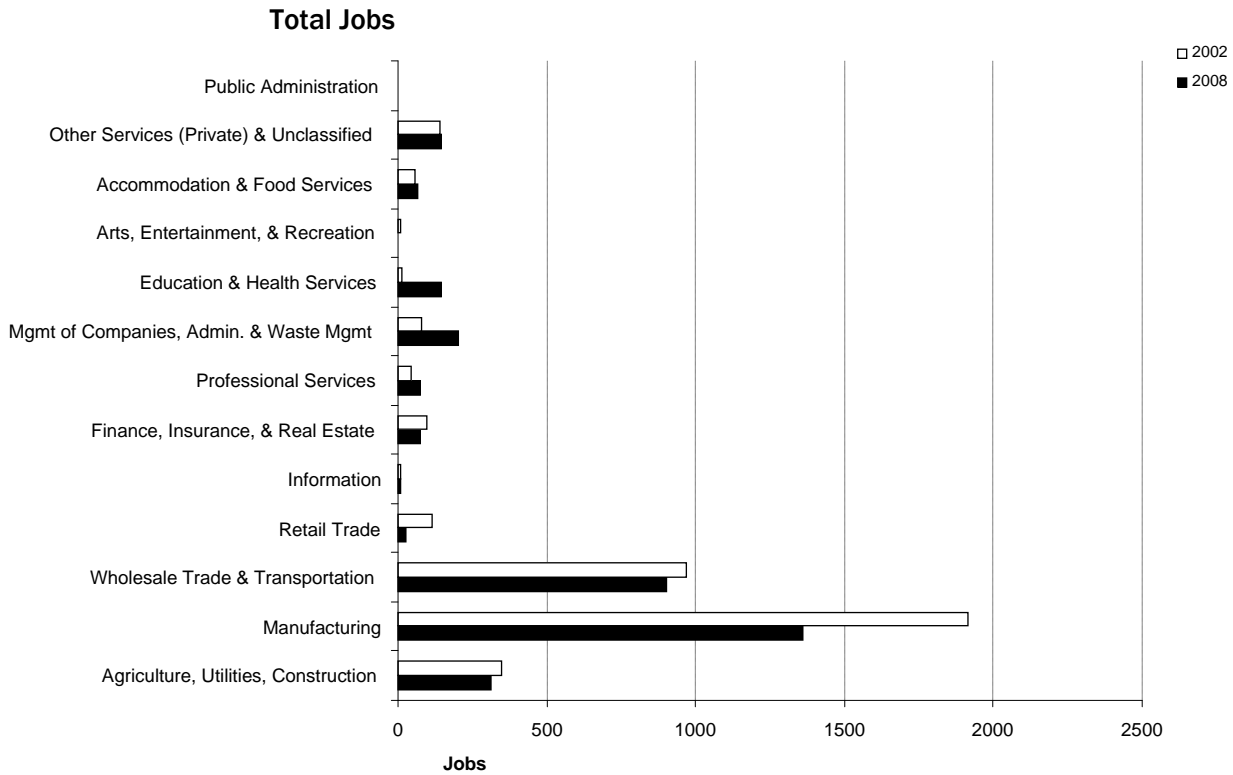
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

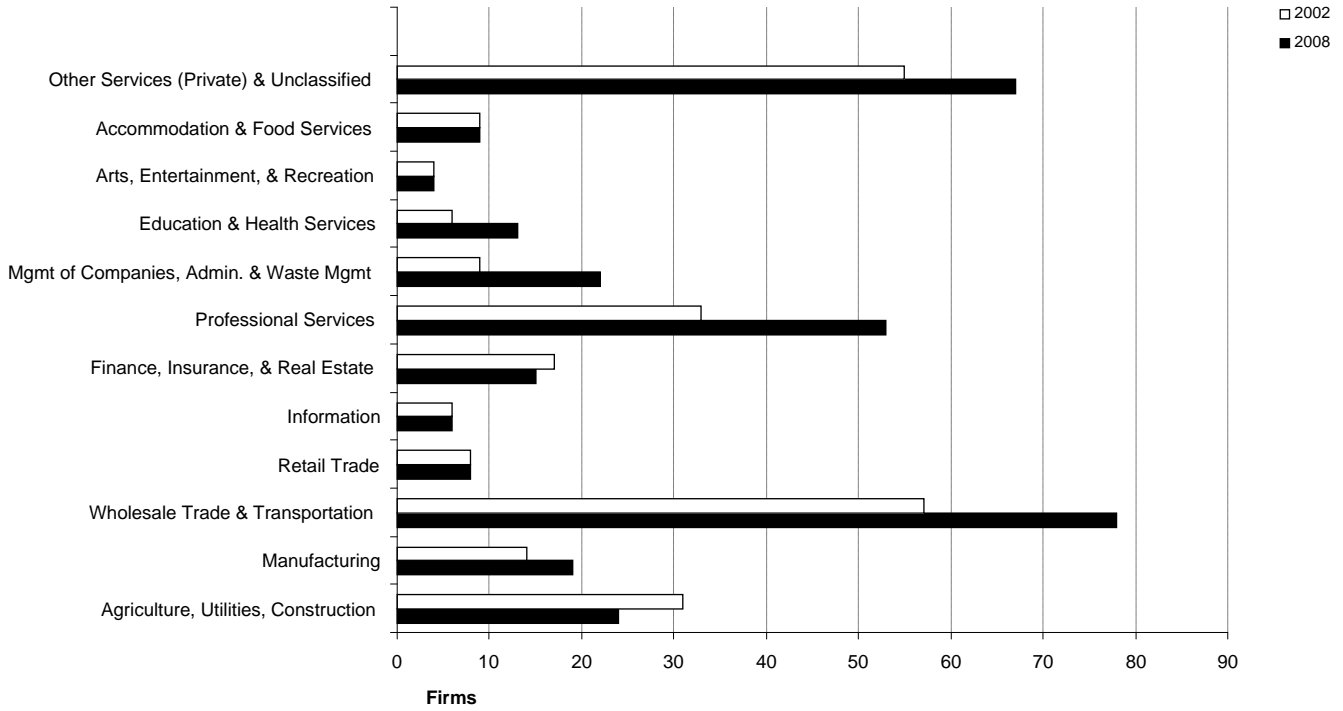
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

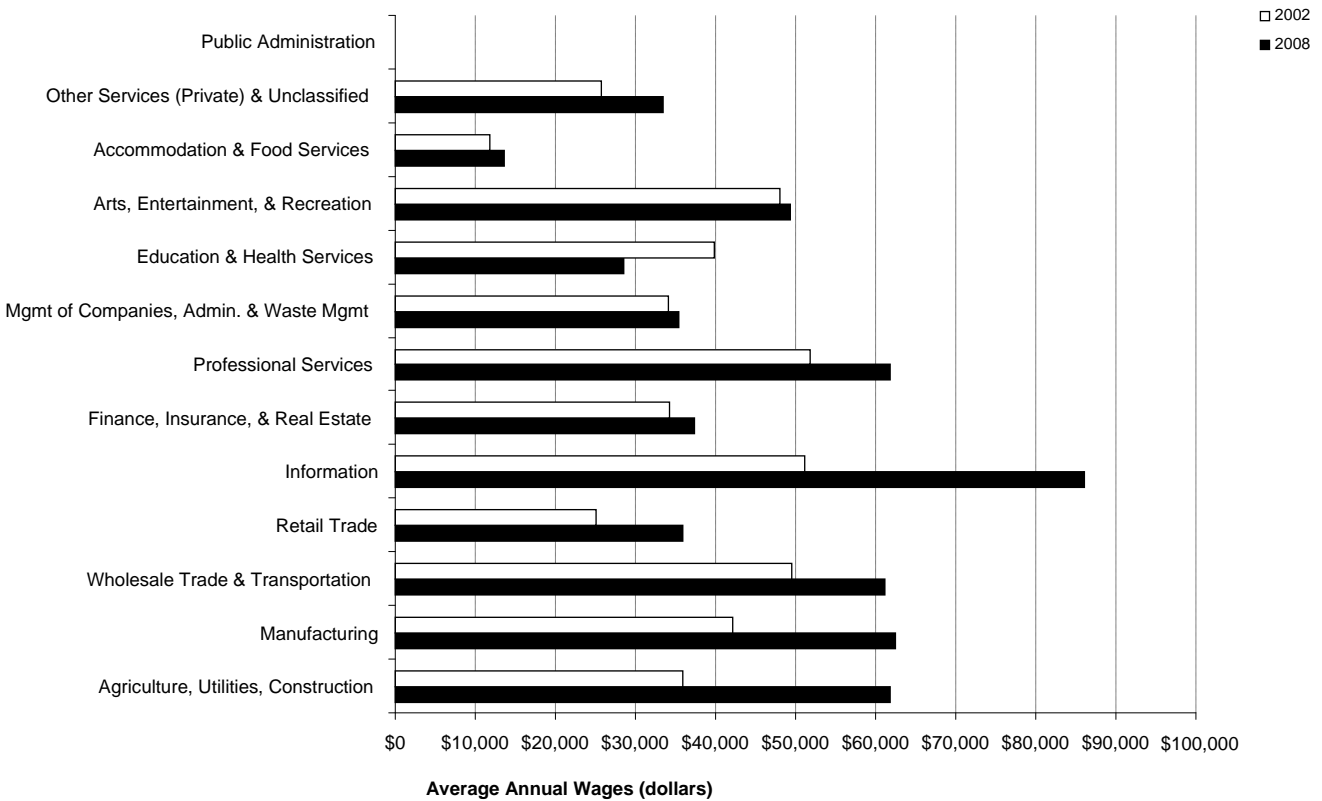
	2002	2008	change
Total Jobs	3,800	3,329	- 471
Total Firms	249	318	+69
Average Annual Wages	\$41,581	\$56,133	+14,552



Total Firms



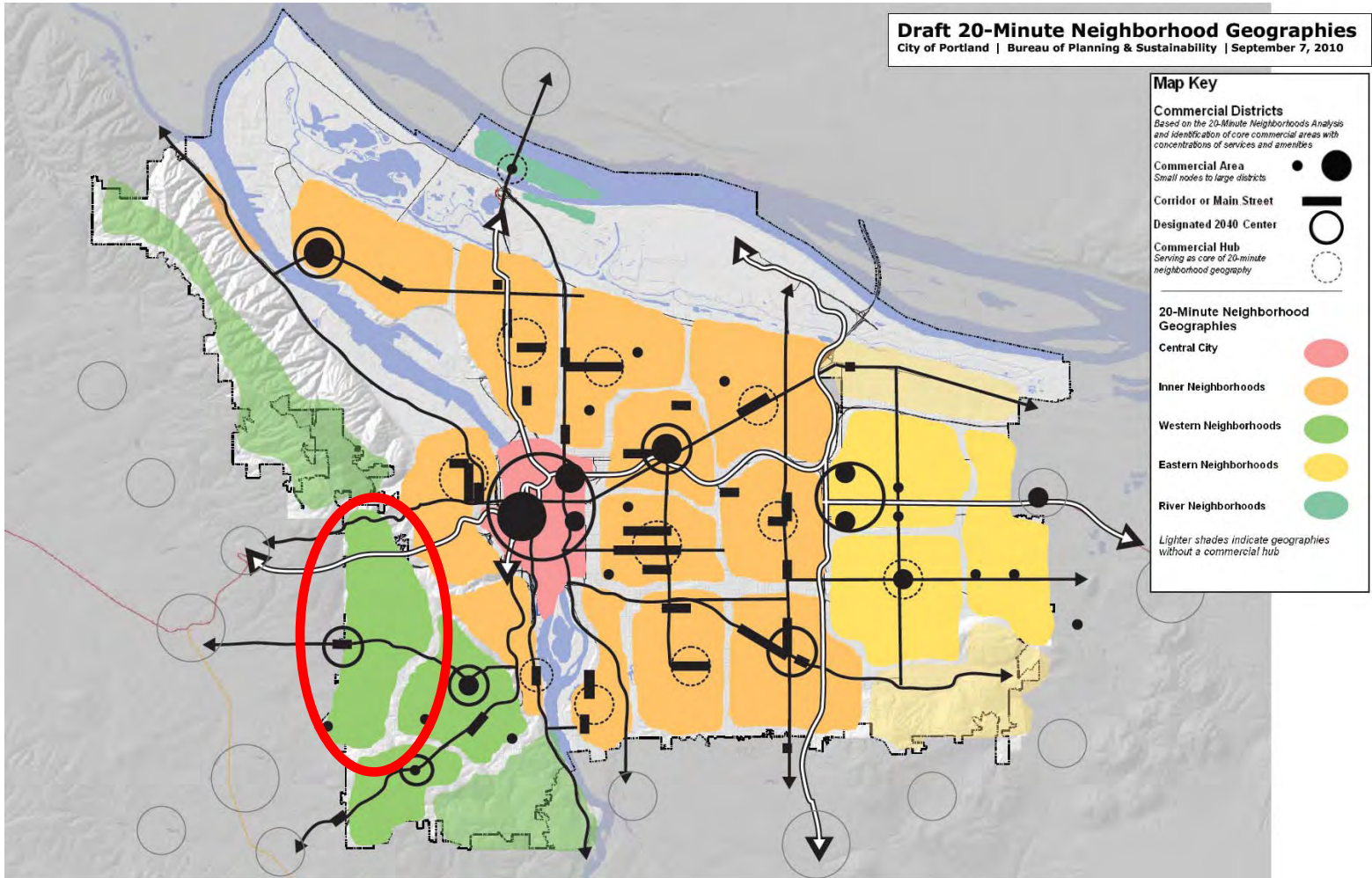
Average Annual Wages



Raleigh Hills Analysis Area

Including Sylvan-Highlands, Bridlemile, Hayhurst, Maplewood, and parts of the Southwest Hills Residential League and Ashcreek neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Raleigh Hills Analysis Area

Services and Amenities

<p><i>Population: 15,400 people (6,500 households)</i> <i>Land Area: 5.2 sq. miles (3,000 people per sq. mile)</i></p>

Commercial Districts

The area's largest concentration of commercial services is the Raleigh Hills shopping area along Beaverton-Hillsdale Highway (mostly located outside Portland in Washington County). Secondary commercial areas are located on Beaverton-Hillsdale Highway at Shattuck Road, at the intersection of Garden Home Road and Oleson Road (at the analysis area's southwest boundary), and at Skyline Boulevard and Highway 26.

Grocery stores: 3

Community Amenities

Community Centers: None (Southwest Community Center located just outside southeast edge of analysis area)

Libraries: None (Garden Home Community Library located just outside southwest edge of analysis area in Washington County)

Parks and Open Spaces: 120 acres – including Hamilton, Albert Kelly, Pendleton and April Hill parks, and the Fanno Creek Natural Area.

Tree Canopy Coverage: 52%

Public Schools: 3 elementary schools (Bridlemile, Hayhurst and Maplewood* elementary schools)
**At edge of analysis area*

Colleges (campus): None

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: None

Walkable Access Score: 22 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

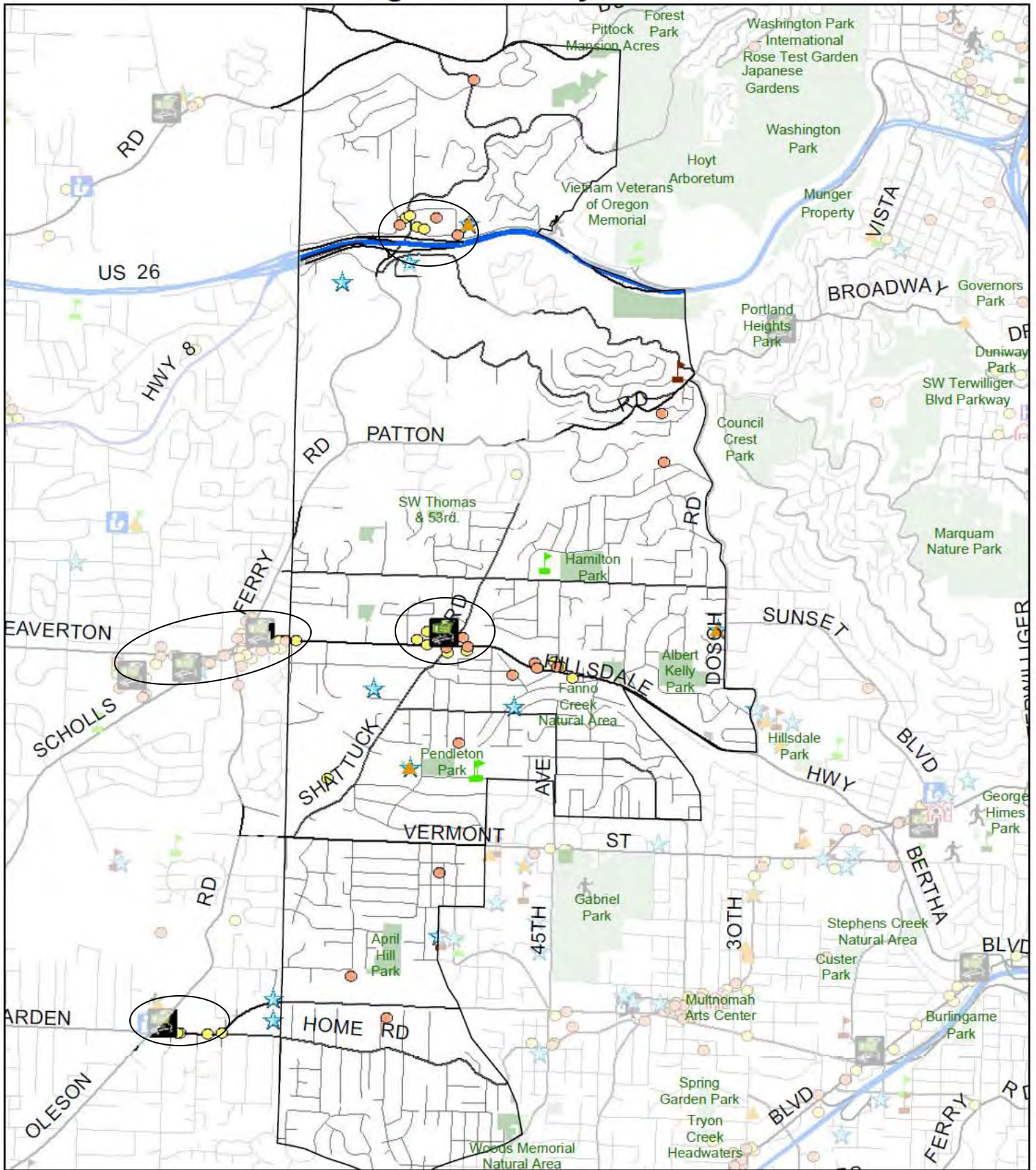
Percentage of households:	
Within 1/2 mile of a park:	55%
Within 1/2 mile of a public elementary school:	11%
Within 3 miles of a full-service community center:	88%
Within 1/2 mile of a full-service grocery store:	13%
Within 1/4 mile of a frequent service transit stop:	5%

Neighborhood and Business Associations

Neighborhood Associations: Sylvan-Highlands, Bridlemile, Hayhurst, Maplewood, and parts of the Southwest Hills Residential League and Ashcreek

Business Associations: None

Raleigh Hills Analysis Area



Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers

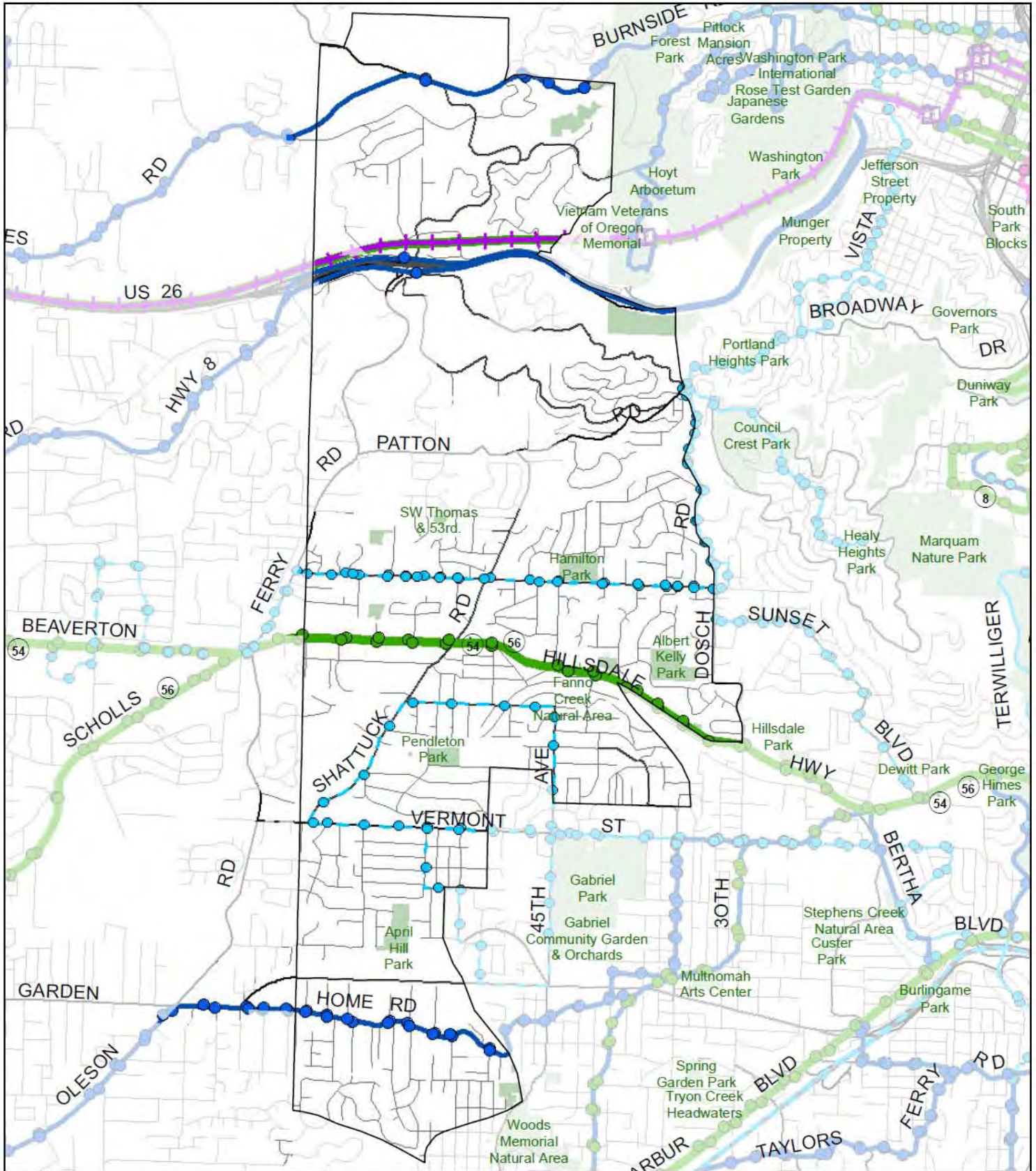


City of Portland Bureau of
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0 750 1,500 3,000
Feet

March 25, 2011

Raleigh Hills Analysis Area



Transit Infrastructure

- + MAX
- + Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



0 750 1,500 3,000 Feet

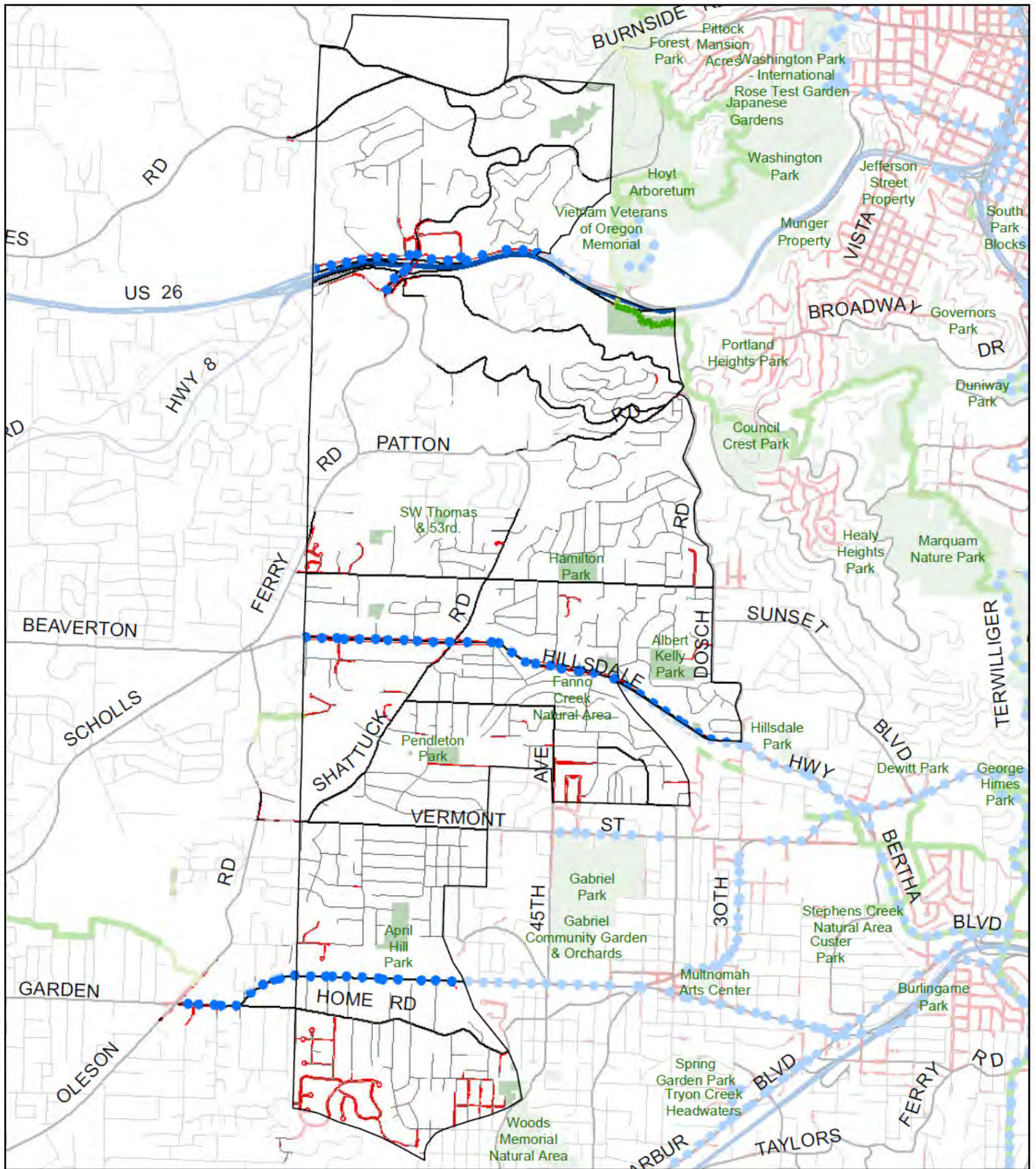


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Sam Adams, Mayor | Susan Anderson, Director

May 12, 2011

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Raleigh Hills Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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0 750 1,500 3,000 Feet

March 25, 2011

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Raleigh Hills Analysis Area

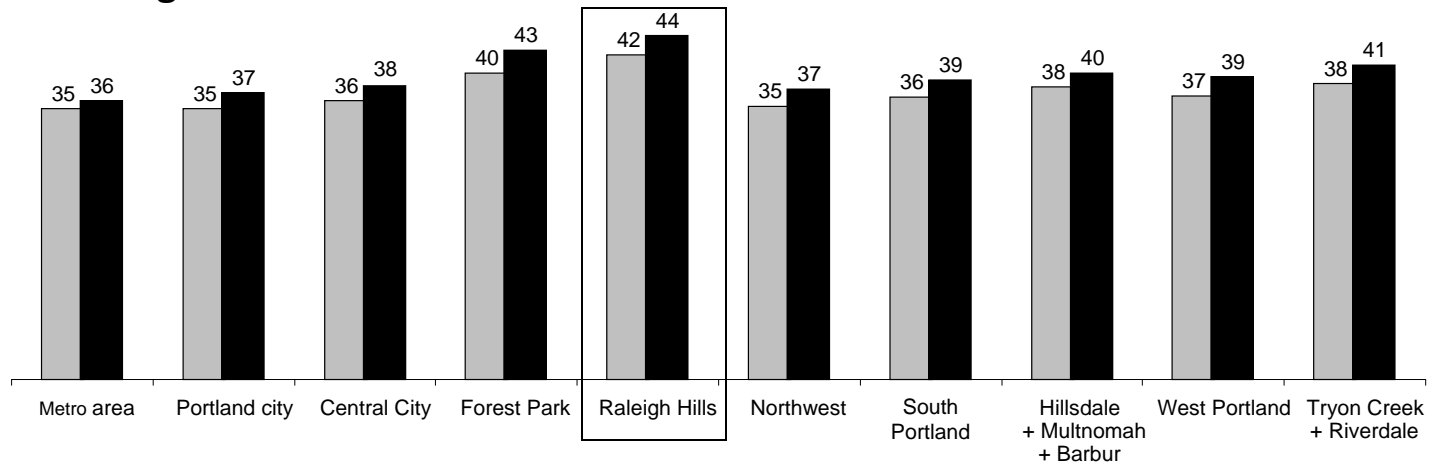
Demographics (2000 – 2010)

Population

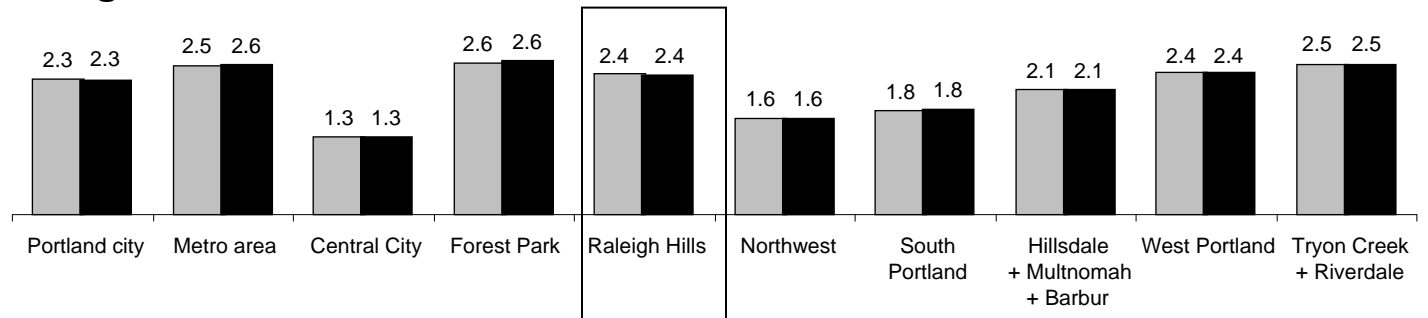
	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	2,226,000	585,000	30,931	8,424	15,446	21,794	8,560	19,601	10,836	9,668
2000	1,927,881	529,121	19,202	5,279	15,485	20,014	8,136	18,674	10,481	8,884
% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

■ 2000 ■ 2010

Median Age

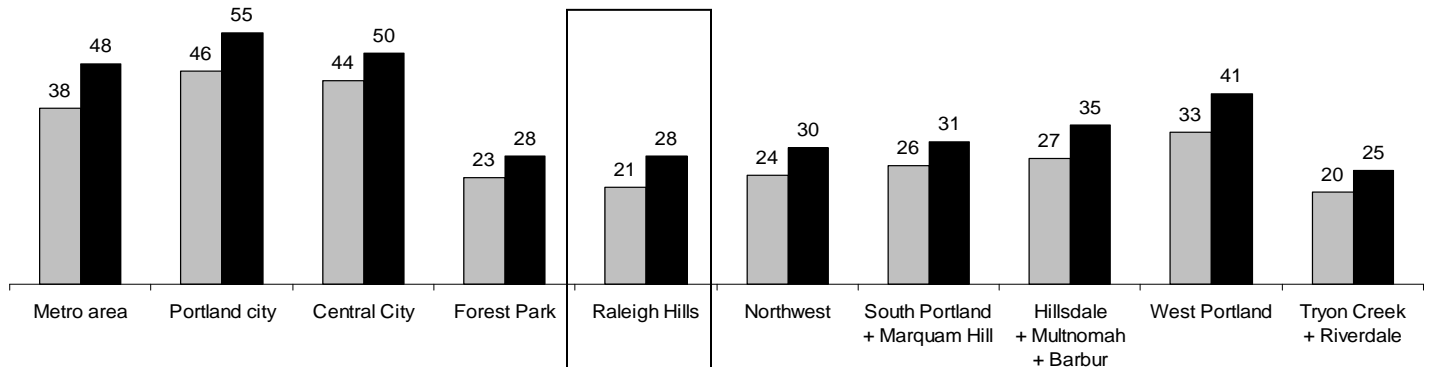


Average Household Size

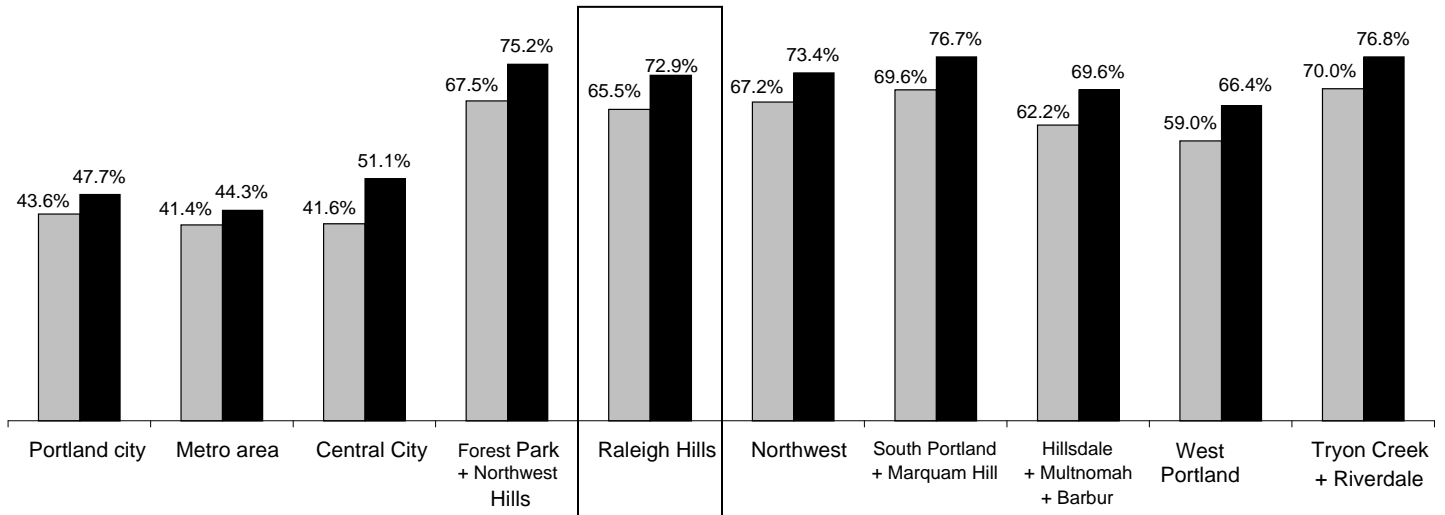


Diversity Index

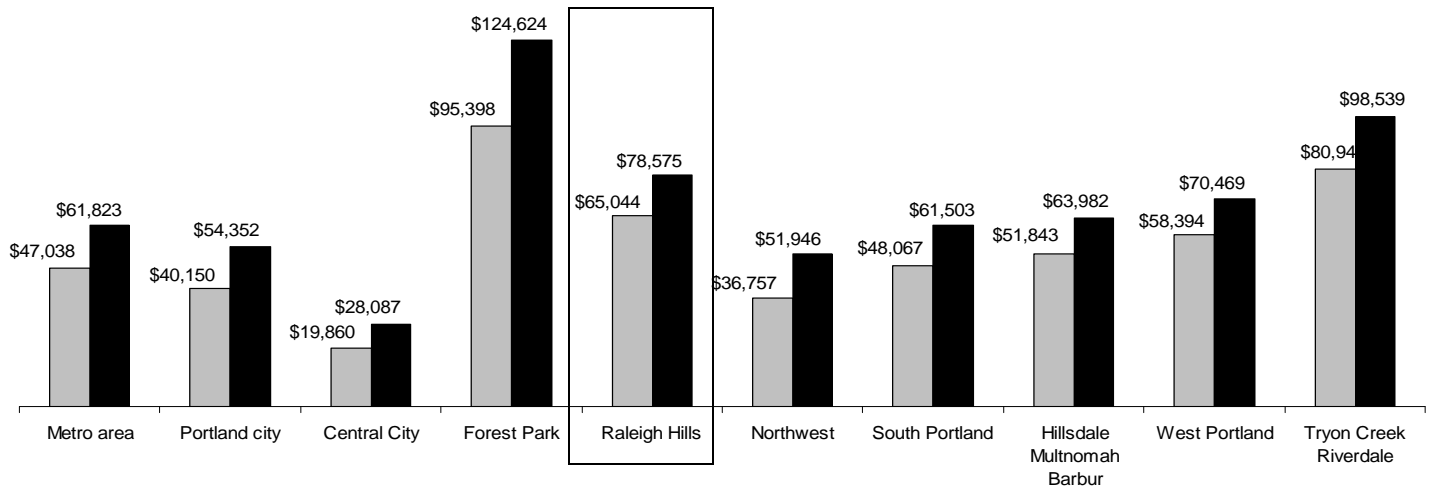
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



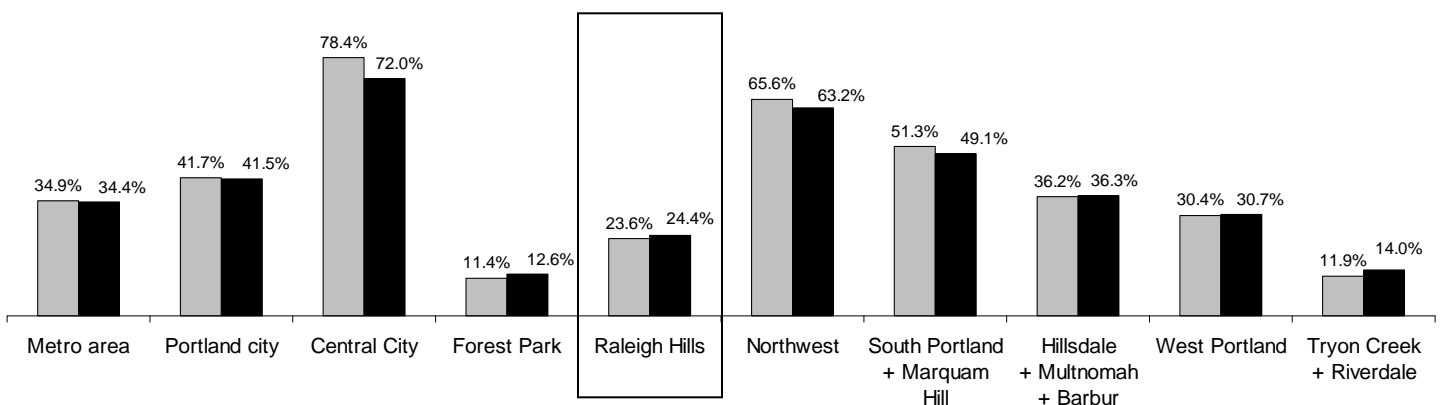
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



Raleigh Hills Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

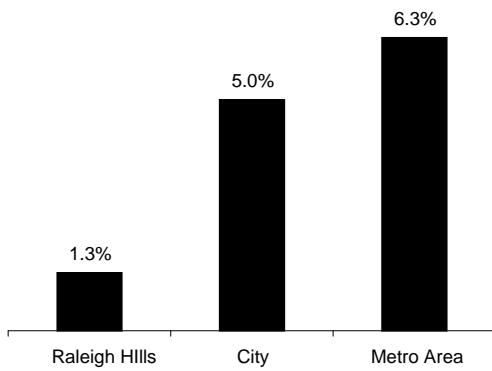
Raleigh Hills	City	Metro Area
136,301	51,937,895	107,875,146

OFFICE SPACE

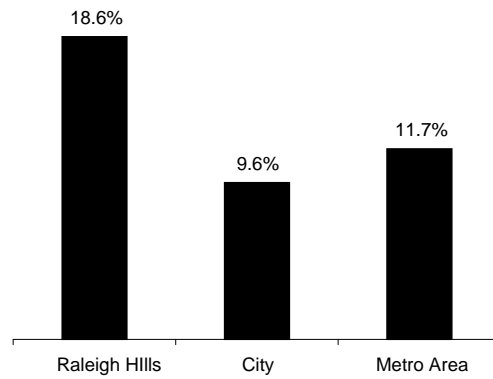
Square Feet

Raleigh Hills	City	Metro Area
321,100	54,348,765	92,465,455

Retail Vacancy



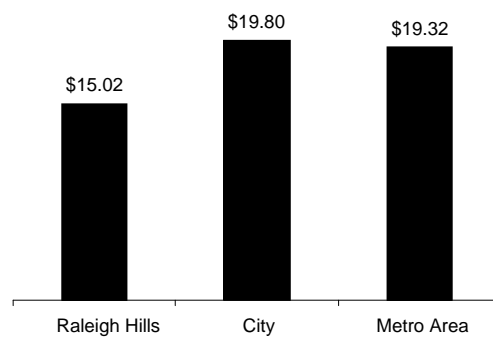
Office Vacancy



Retail Rents



Office Rents



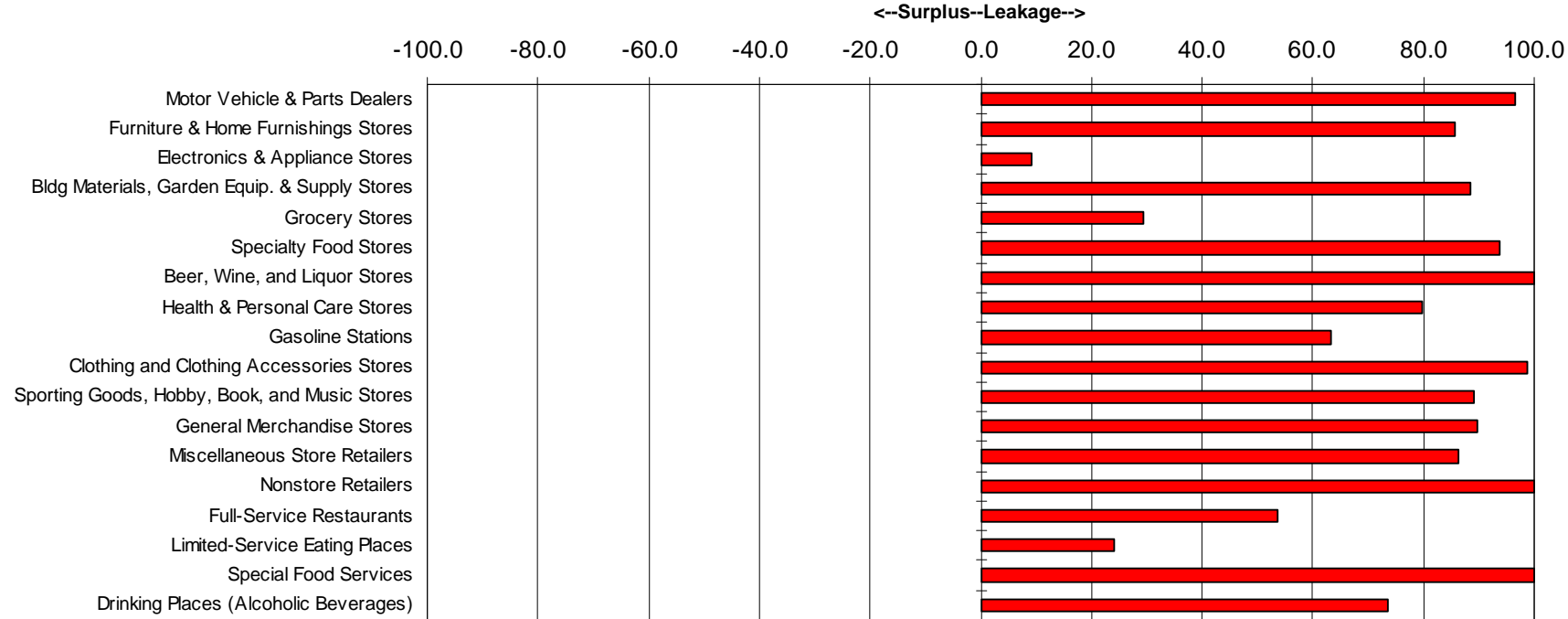
Raleigh Hills Analysis Area

Retail Market Profile

Retail Gap = \$221 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$282,262,925	\$60,834,720	\$221,428,205	64.5	57
Total Retail Trade (NAICS 44-45)	\$241,655,881	\$44,997,553	\$196,658,328	68.6	43
Total Food & Drink (NAICS 722)	\$40,607,044	\$15,837,167	\$24,769,877	43.9	14

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Raleigh Hills Analysis Area

Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

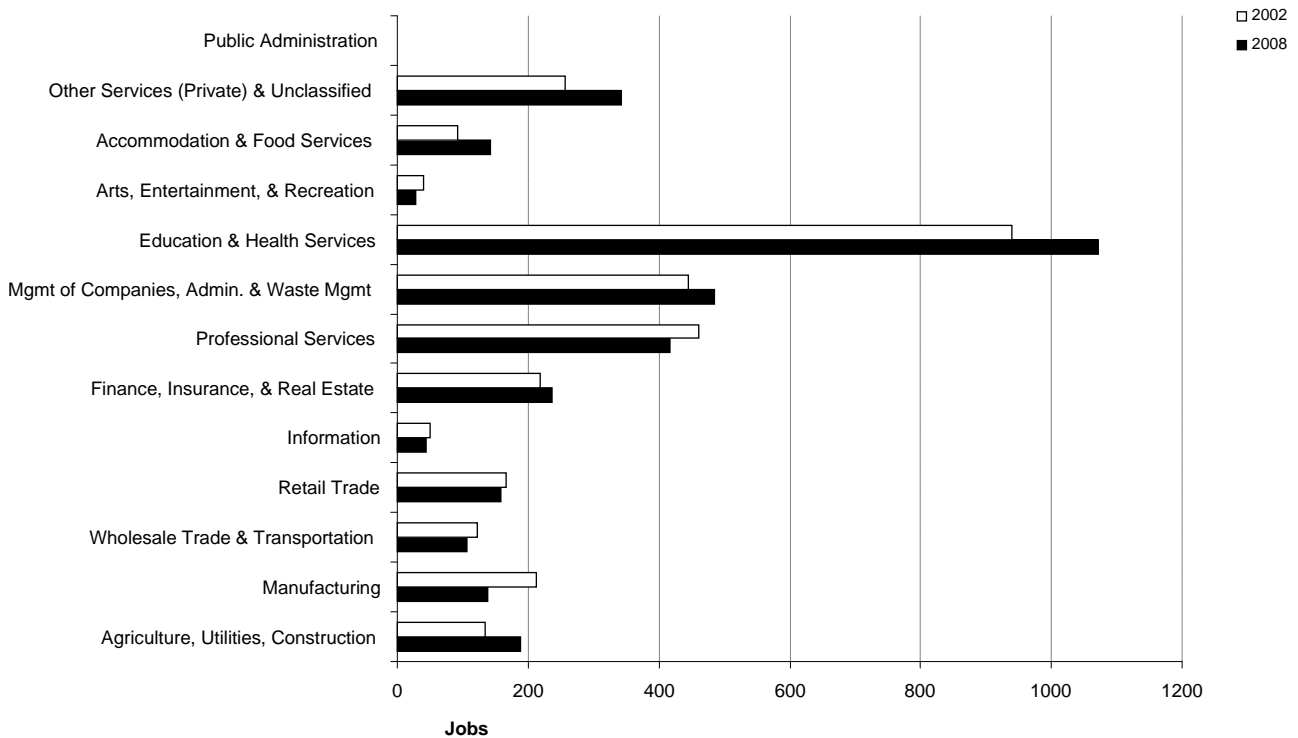
Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

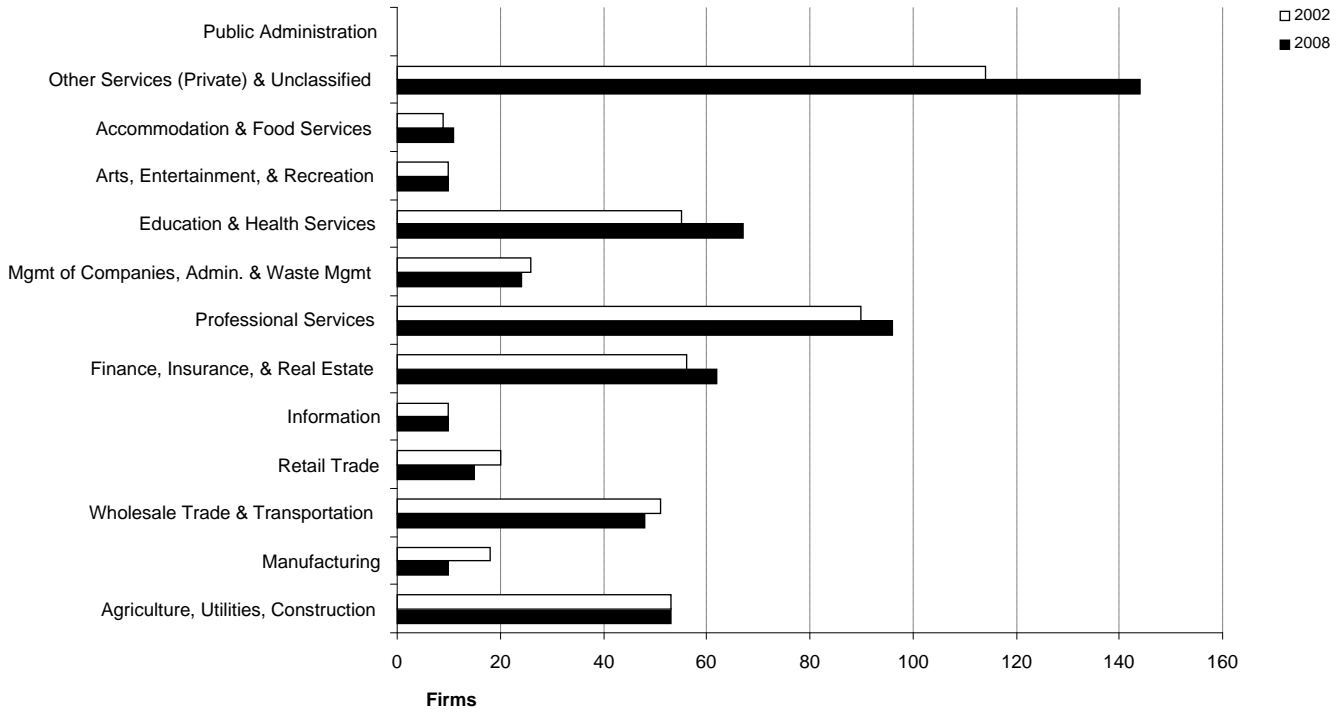
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	3,143	3,360	+217
Total Firms	512	550	+38
Average Annual Wages	\$32,193	\$37,437	+5,244

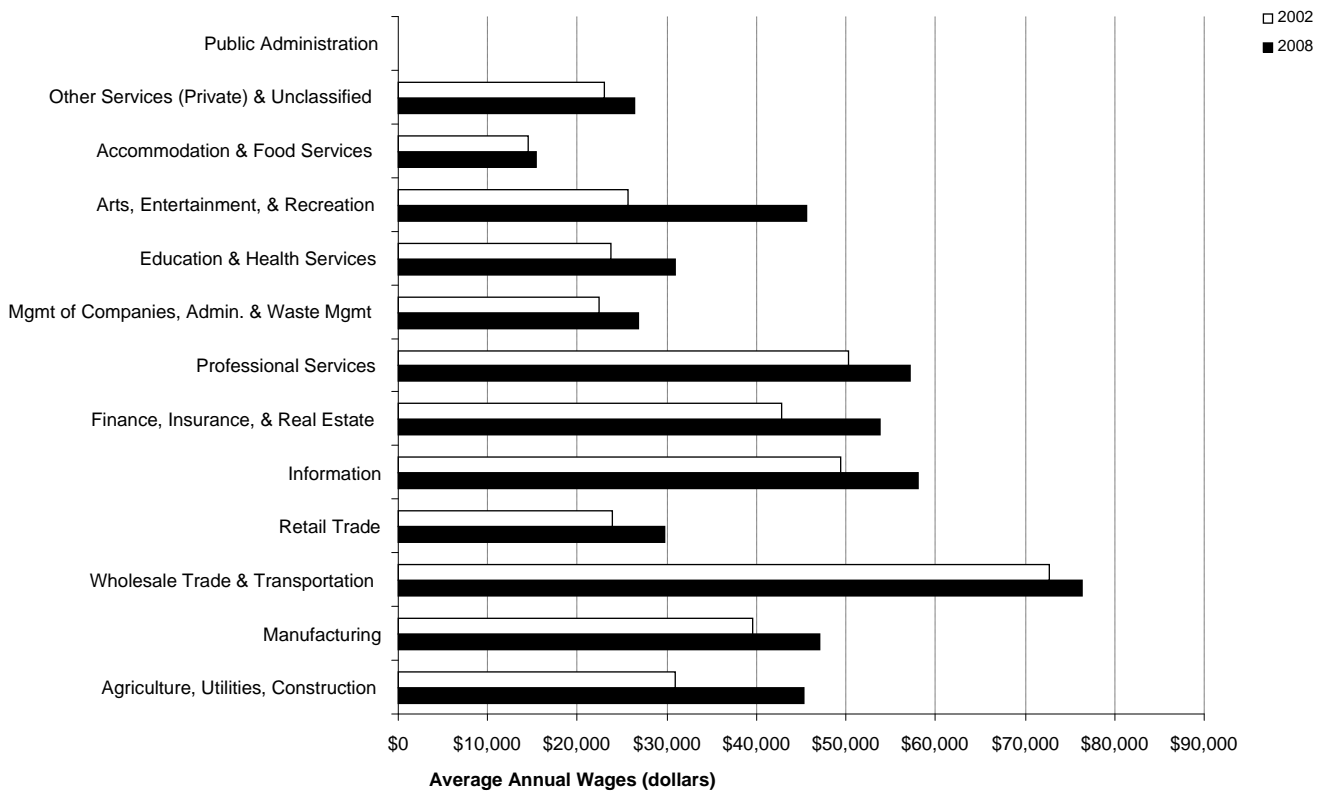
Total Jobs



Total Firms



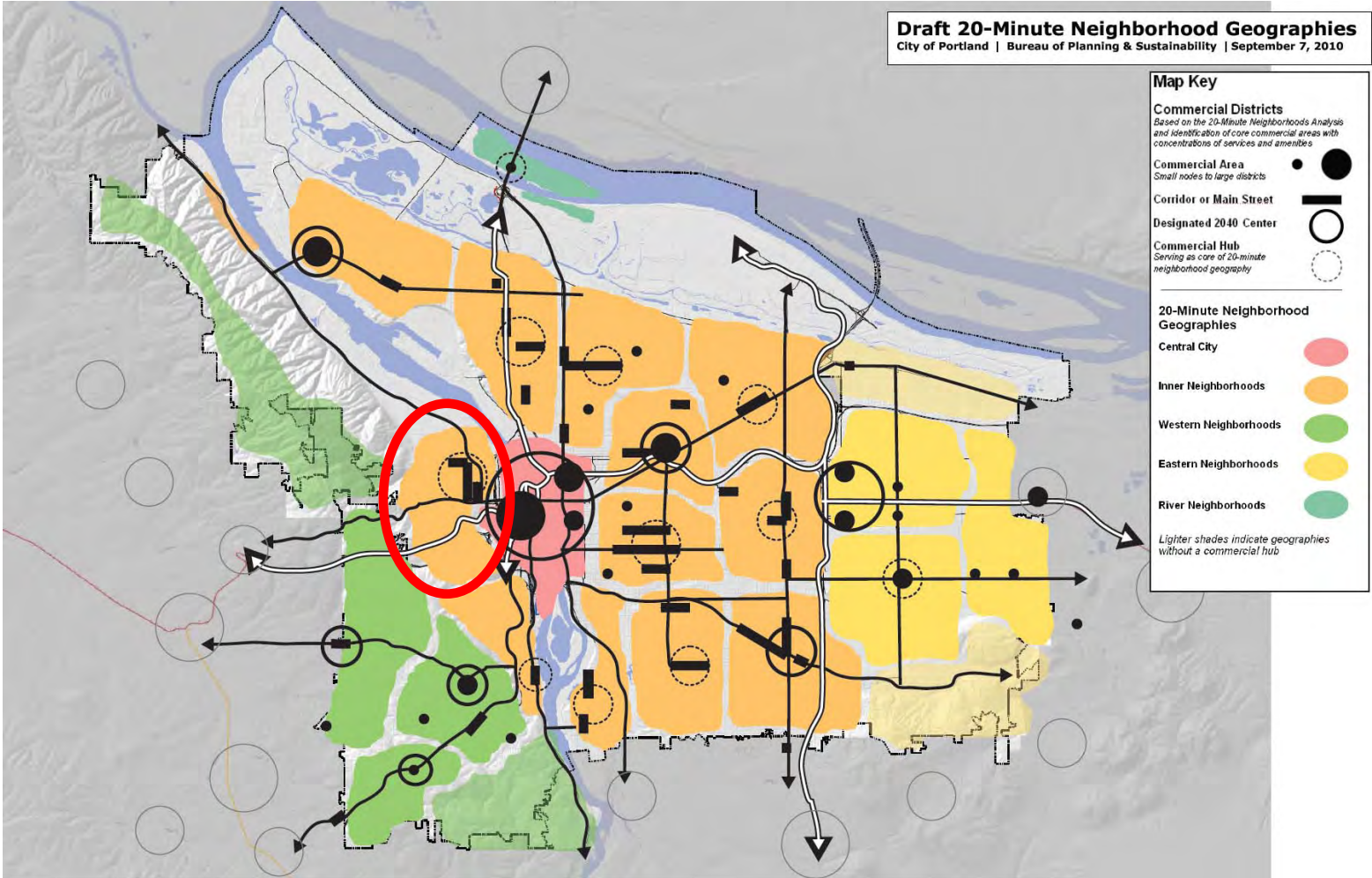
Average Annual Wages



Northwest Analysis Area

Including Northwest District, Hillside, Arlington Heights, and parts of the Southwest Hills Residential League and Goose Hollow neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Northwest Analysis Area

Services and Amenities

Population: 21,800 people (12,800 households)
Land Area: 4.0 sq. miles (5,400 people per sq. mile)

Commercial Districts

The area's largest concentrations of commercial services are the historic main street corridors along NW 23rd and NW 21st. Other concentrations of commercial services are located along NW Thurman and along West Burnside. These commercial areas are all located in the low-lying "flats" of the analysis area, as the upland "heights" of the West Hills are primarily residential.

Grocery stores: 5

Community Amenities

Community Centers: 1 (Hillside Community Center)

Libraries: 1 (Northwest Library)

Parks and Open Spaces: 722 acres – including Washington Park, Marquam Nature Park, Pittock Mansion Acres, and Macleay, Wallace, Hillside, Couch, Governors, and Portland Heights parks.

Tree Canopy Coverage: 53%

Public Schools: 3 K-8 schools (Ainsworth and Couch elementary schools, Multnomah Learning Center K-12)

Colleges (campus): 1 (Linfield College – Portland Campus)

Hospitals: 1 (Good Samaritan Hospital and Medical Center)

Farmers Markets: 1 (Northwest Portland Farmers Market)

Transit Centers/Stations: 1 (Washington Park light rail station [Civic Plaza light rail station located adjacent to analysis area in Goose Hollow])

Walkable Access Score: 39 (out of 100) – *Note that this is the averaged score is for the entire analysis area. Walkable access scores for the flats and heights portions are:*
Flats (NW District and part of Goose Hollow): 73
Heights/hillside areas: 22
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

Within 1/2 mile of a park: 74%

Within 1/2 mile of a public elementary school: 53%

Within 3 miles of a full-service community center: 76%

Within 1/2 mile of a full-service grocery store: 59%

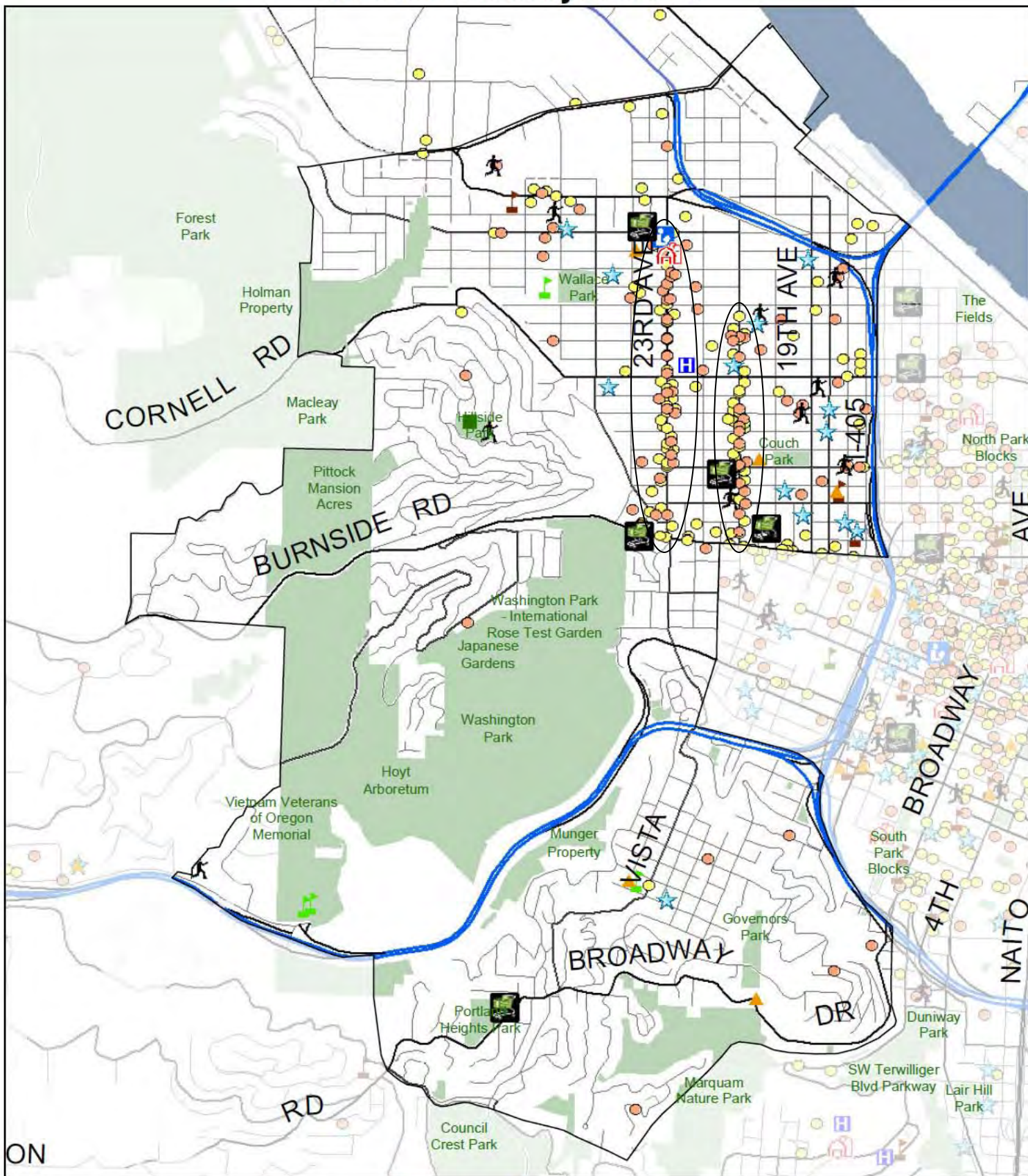
Within 1/4 mile of a frequent service transit stop: 51%

Neighborhood and Business Associations

Neighborhood Associations: Northwest District, Hillside, Arlington Heights, and parts of the Southwest Hills Residential League and Goose Hollow

Business Associations: Nob Hill Business Association

Northwest Analysis Area



Services and Amenities

-  Type 1 Commercial
-  Type 2 Commercial
-  Fitness Centers
-  Grocery Stores
-  Places of Worship
-  Farmers Markets
-  Libraries
-  Community Centers
-  Public HS
-  Public K-8
-  Private Schools
-  Daycare Centers



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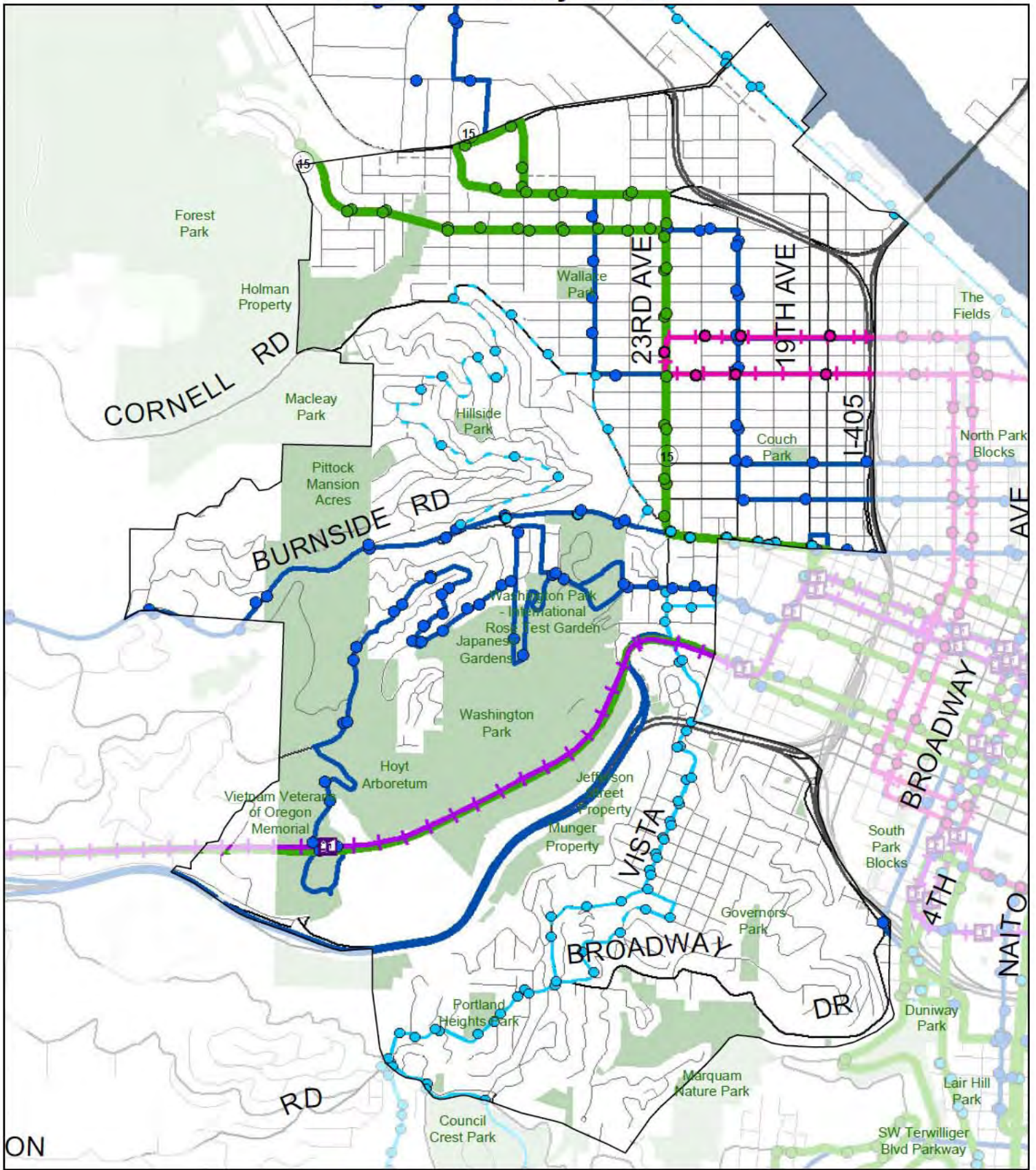


March 25, 2011

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commercial data from InfoUSA 2008

Northwest Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service

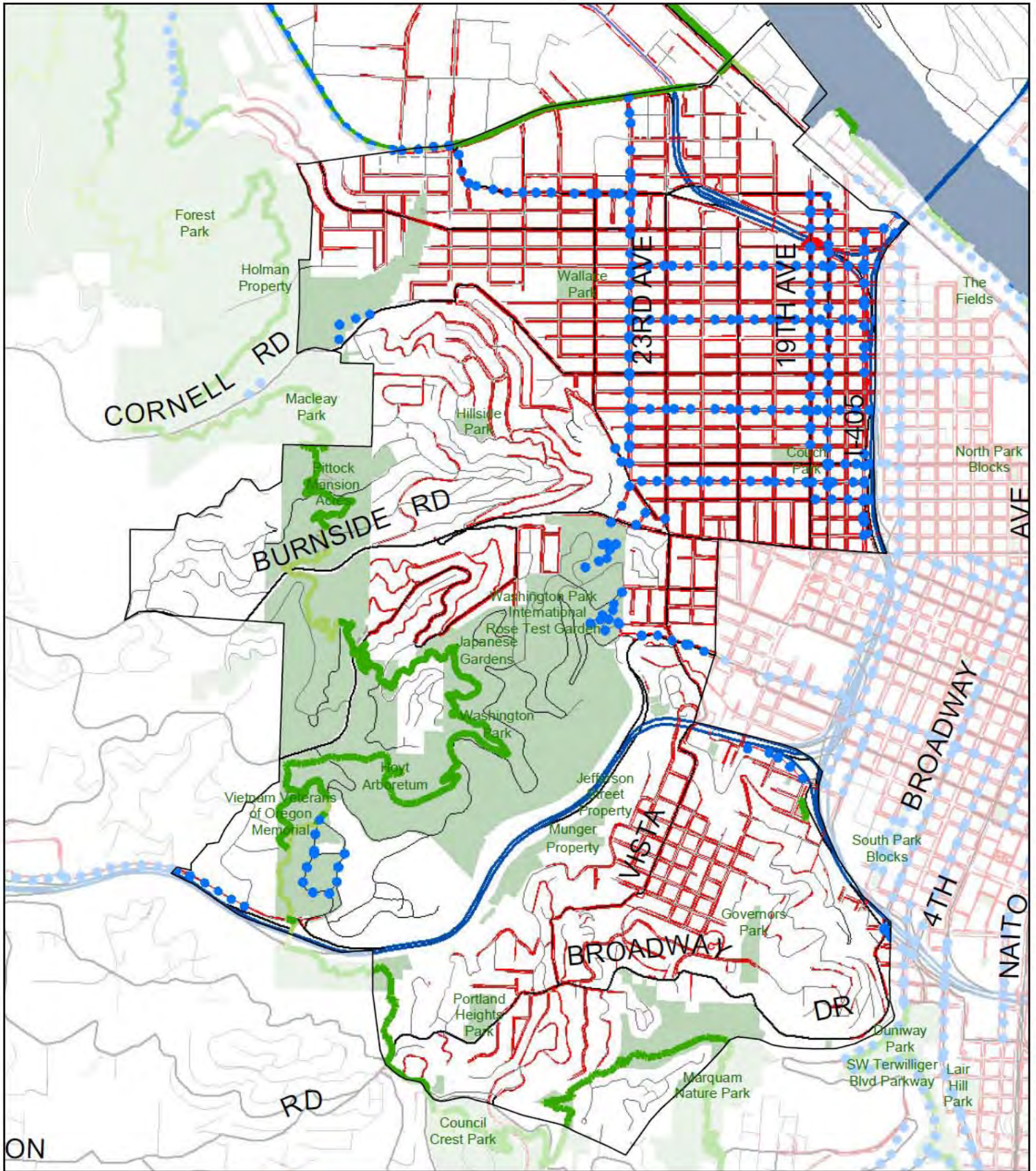


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May 11, 2011

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Northwest Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

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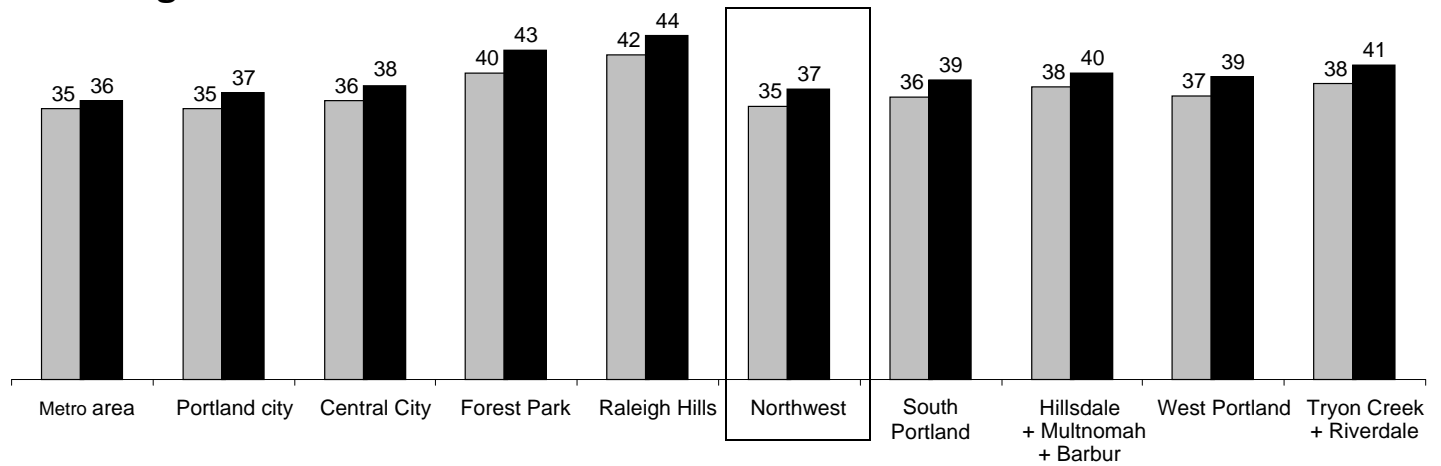
Northwest Analysis Area Demographics (2000 – 2010)

Population

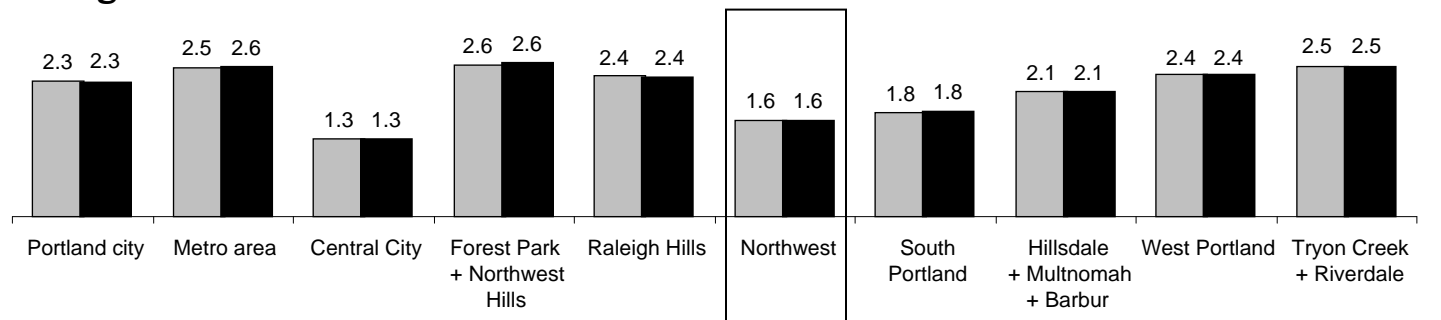
	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	2,226,000	585,000	30,931	8,424	15,446	21,794	8,560	19,601	10,836	9,668
2000	1,927,881	529,121	19,202	5,279	15,485	20,014	8,136	18,674	10,481	8,884
% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

■ 2000 ■ 2010

Median Age

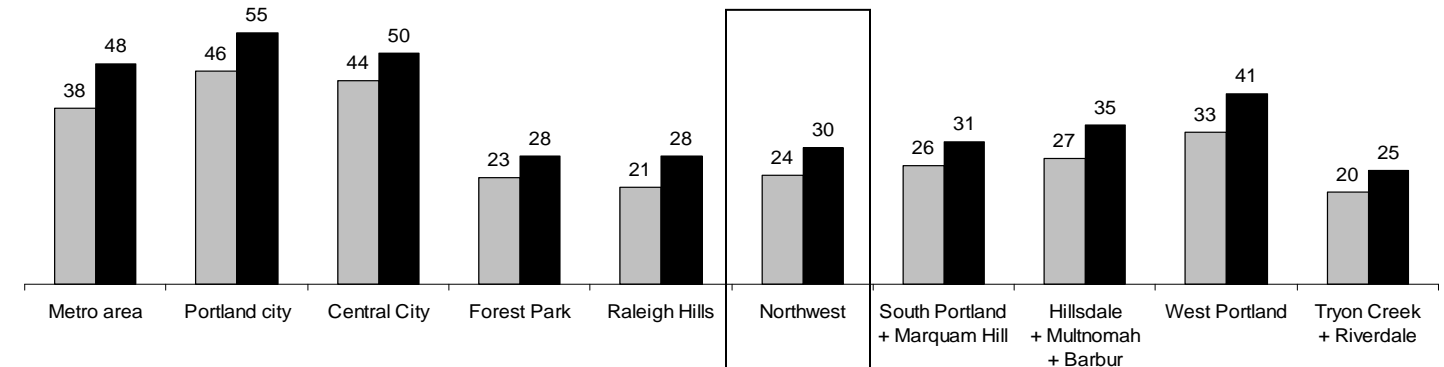


Average Household Size

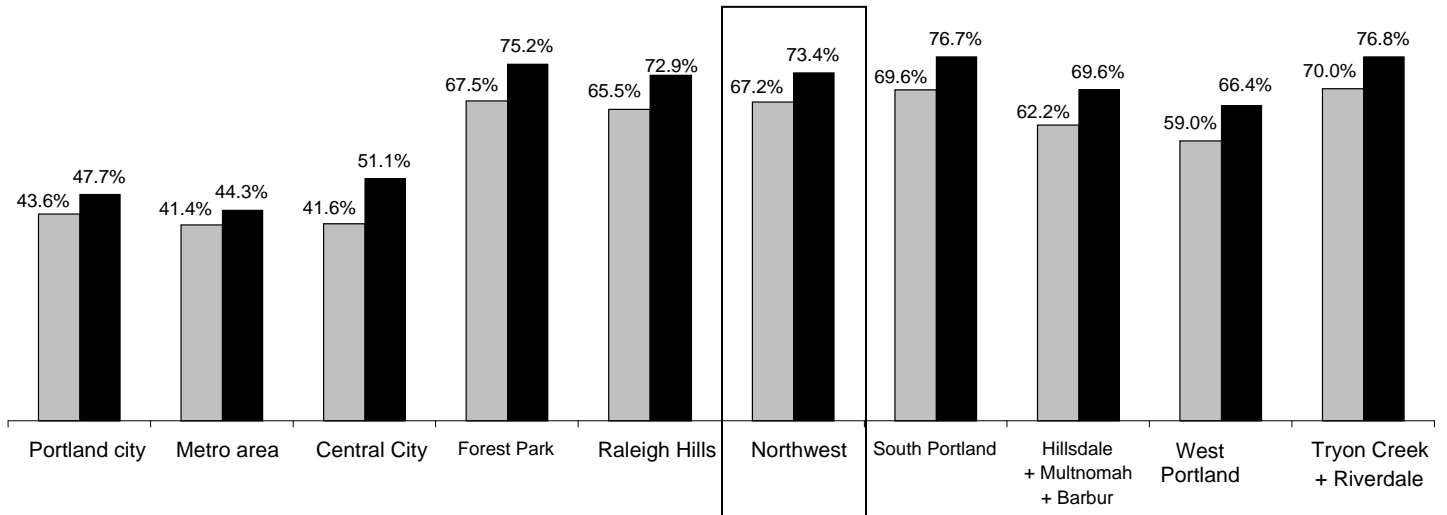


Diversity Index

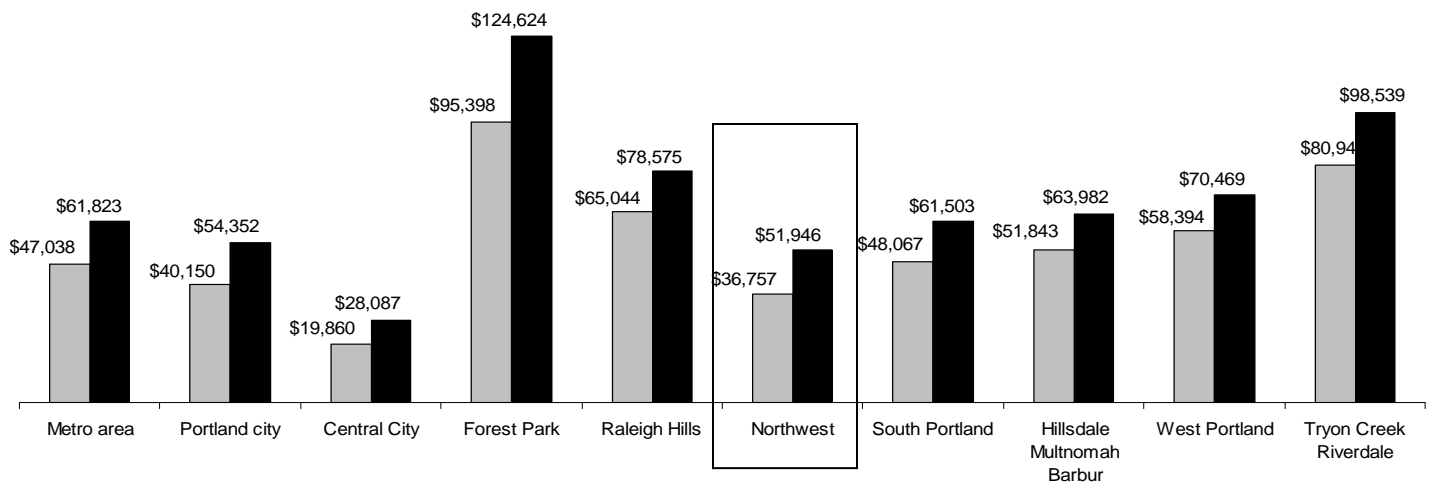
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



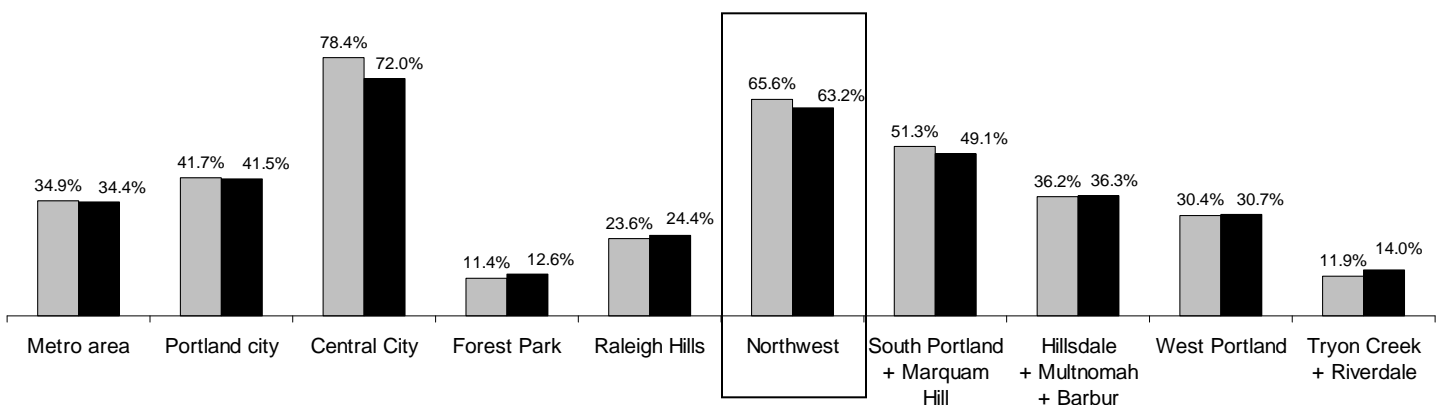
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



Northwest Analysis Area

Commercial Real Estate Indicators

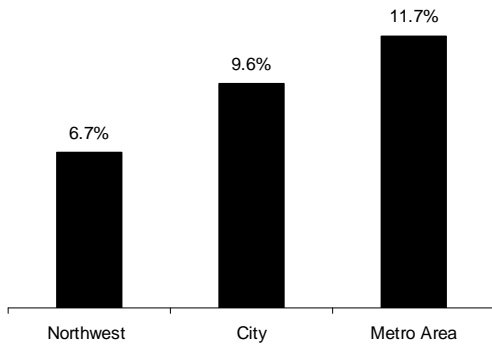
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

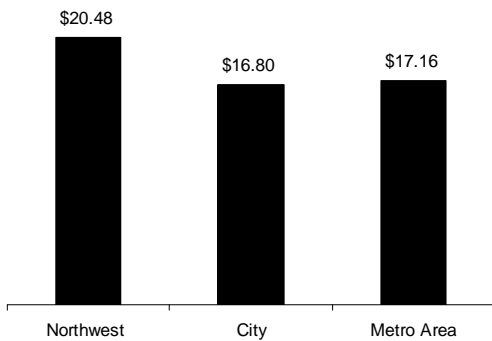
Square Feet

Northwest	City	Metro Area
2,531,441	51,937,895	107,875,146

Retail Vacancy



Retail Rents

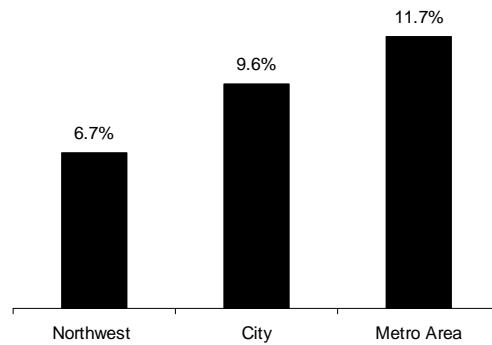


OFFICE SPACE

Square Feet

Northwest	City	Metro Area
3,771,729	54,348,765	92,465,455

Office Vacancy



Office Rents



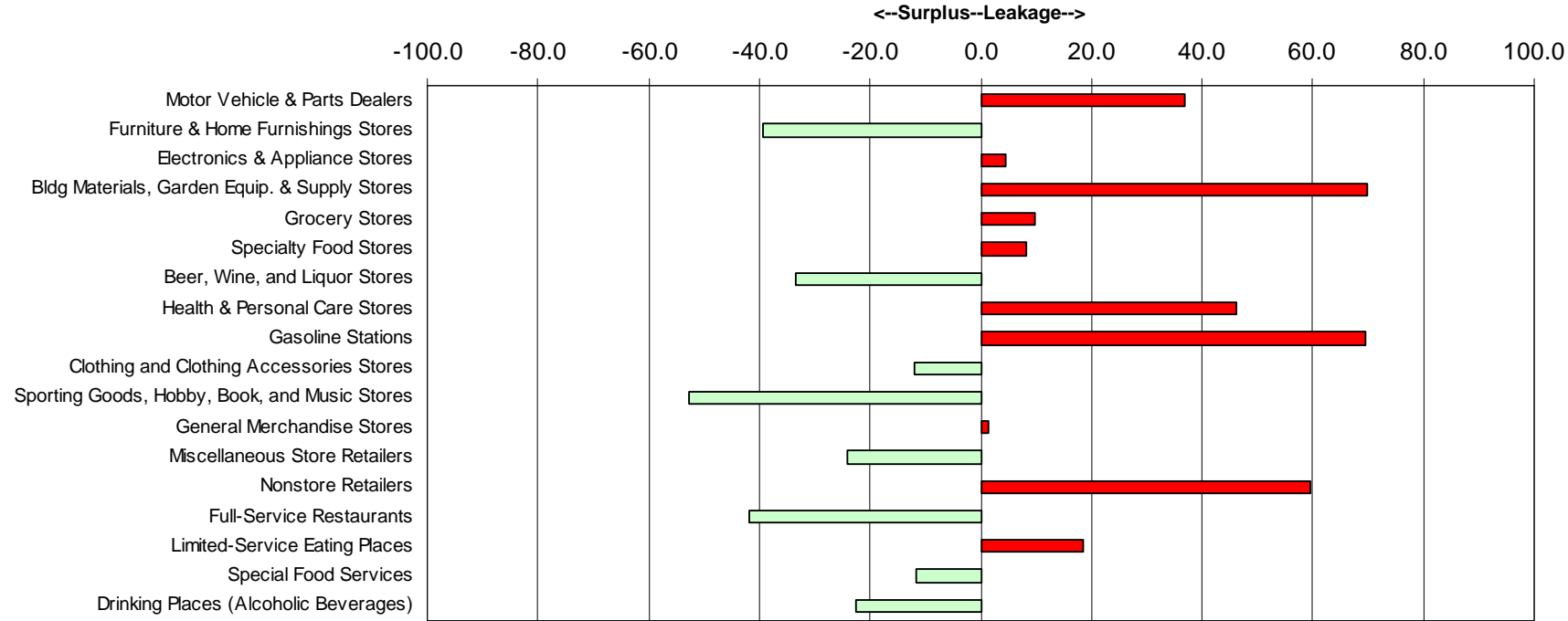
Northwest Analysis Area

Retail Market Profile

Retail Gap = \$57 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$395,089,551	\$338,182,629	\$56,906,922	7.8	389
Total Retail Trade (NAICS 44-45)	\$335,912,117	\$254,912,308	\$80,999,809	13.7	250
Total Food & Drink (NAICS 722)	\$59,177,434	\$83,270,321	-\$24,092,887	-16.9	139

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Northwest Analysis Area

Employment

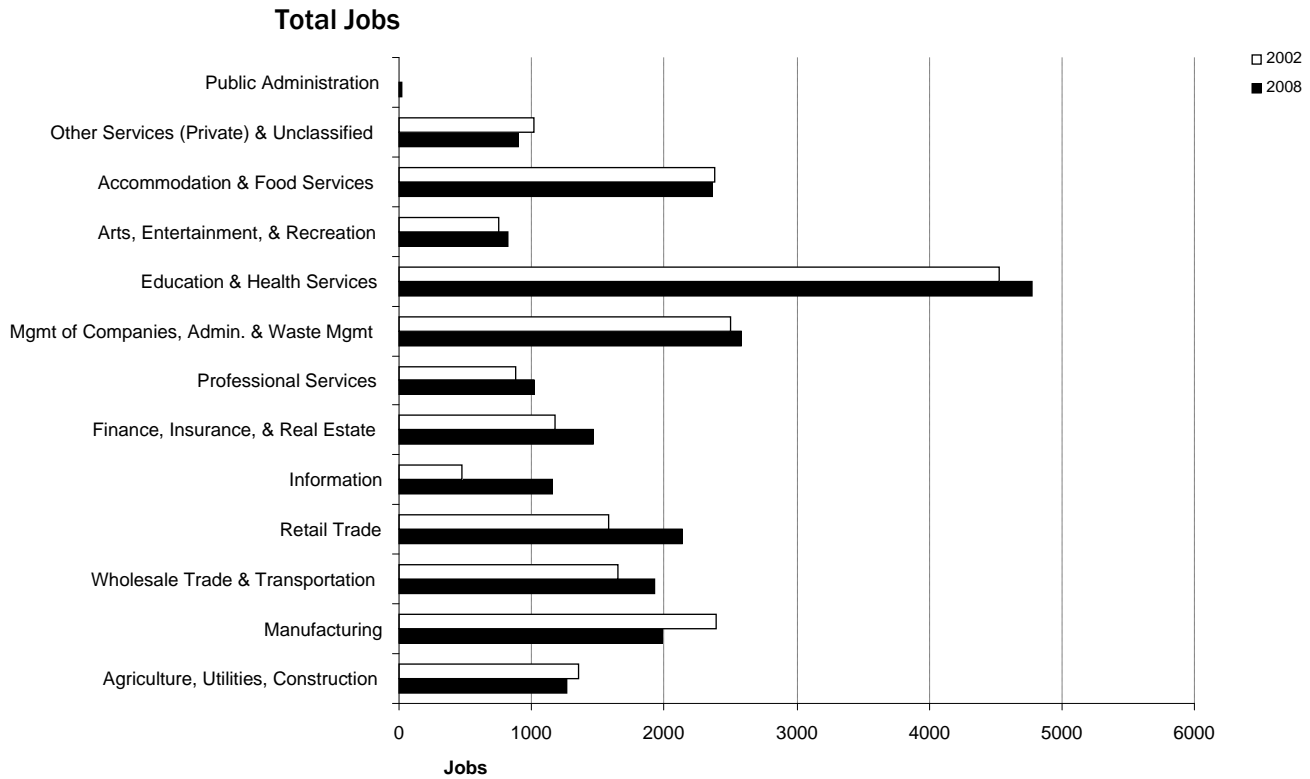
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

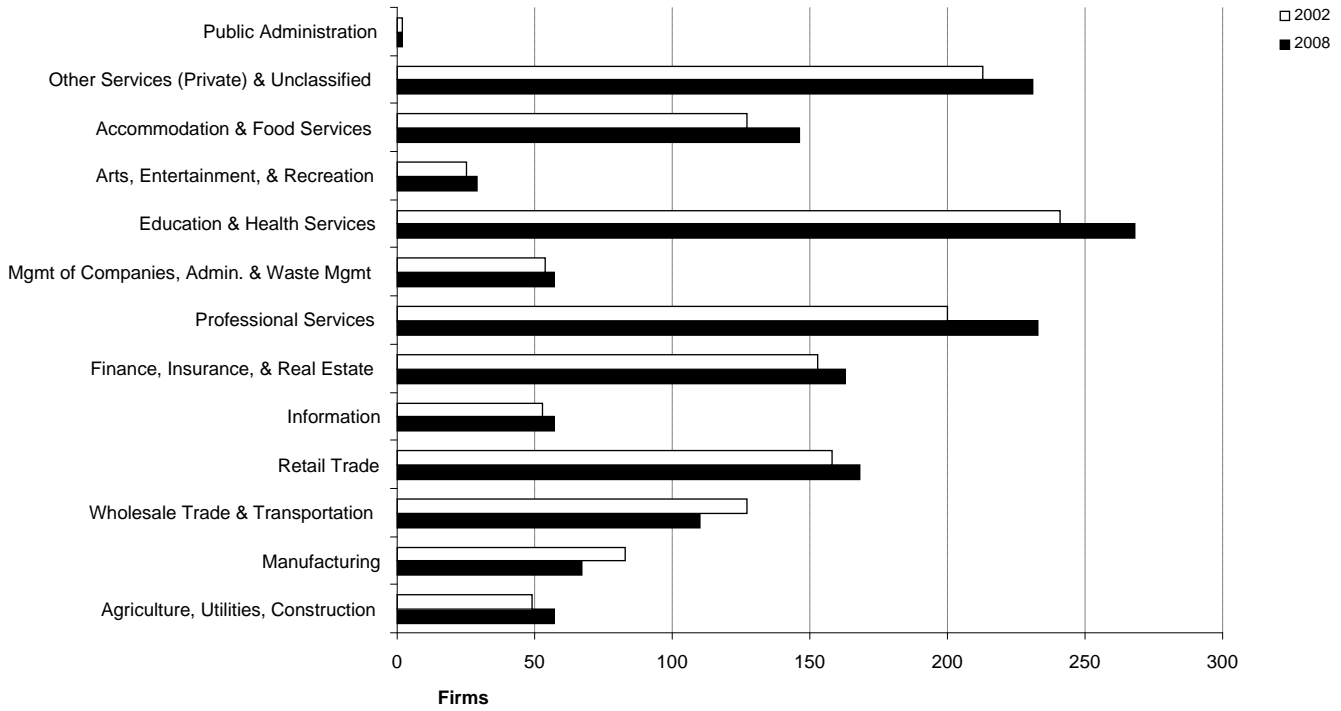
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

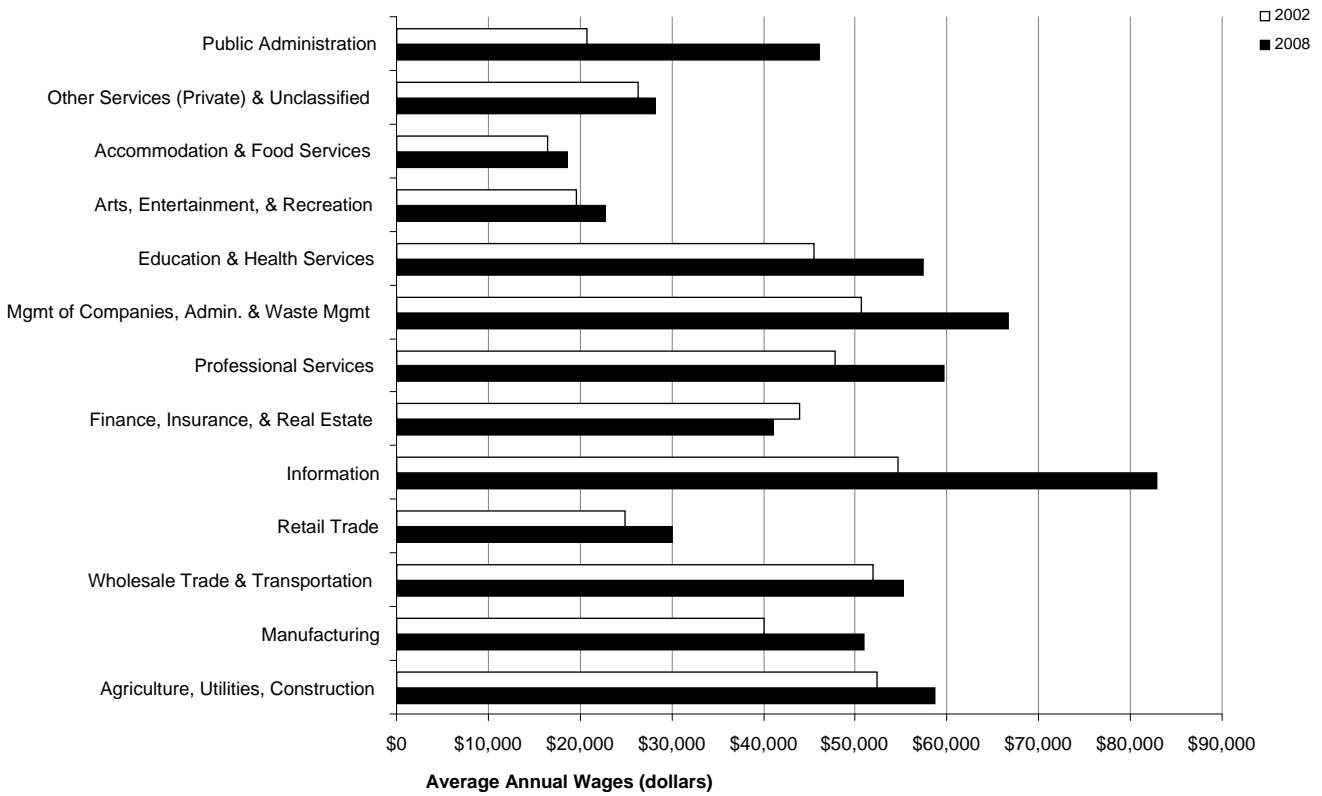
	2002	2008	change
Total Jobs	20,720	22,409	+1,689
Total Firms	1,485	1,588	+103
Average Annual Wages	\$39,846	\$49,005	+9,159



Total Firms



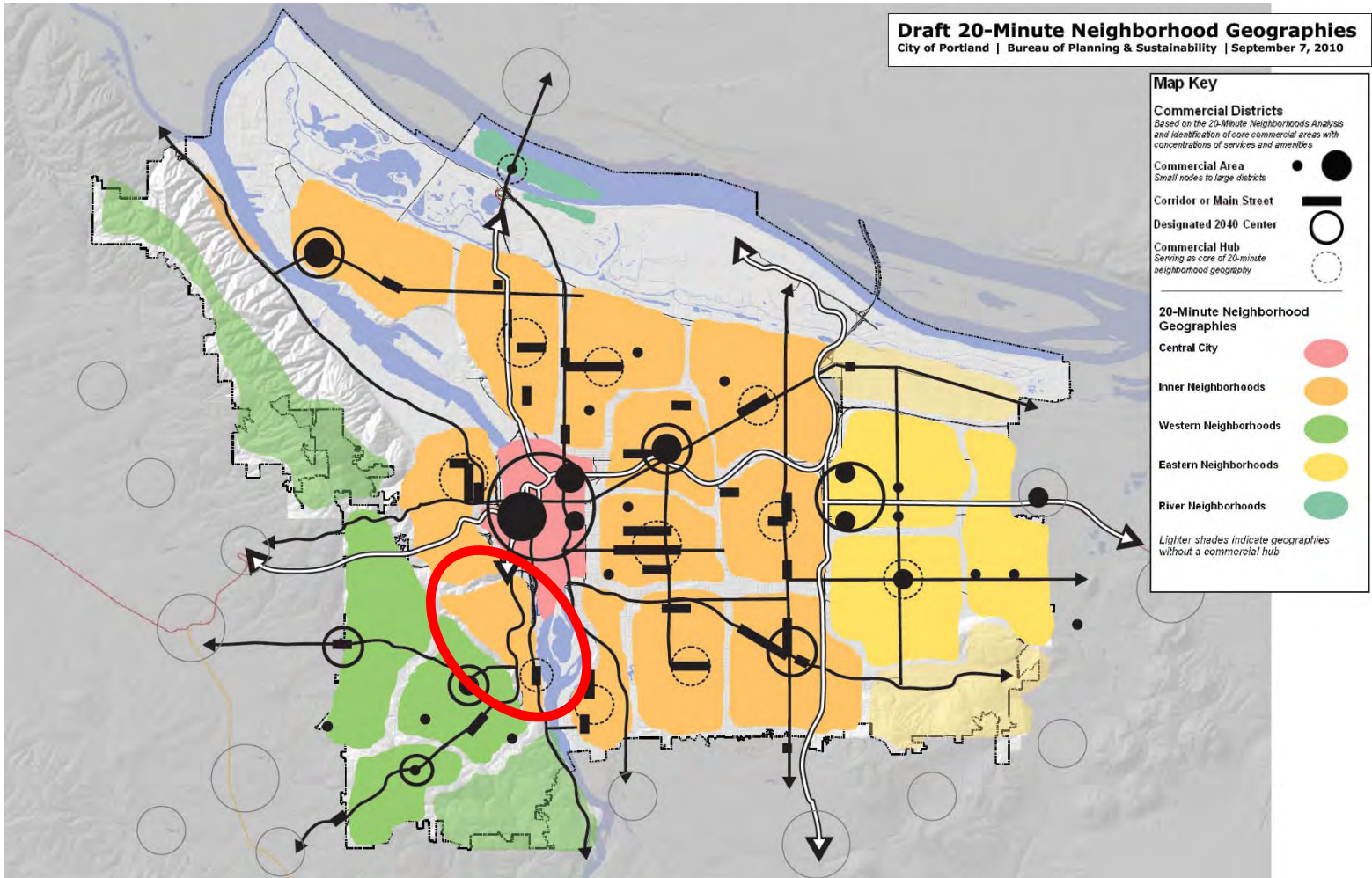
Average Annual Wages



South Portland-Marquam Hill Analysis Area

Including South Portland, Homestead, and Healy Heights neighborhoods, and part of the Southwest Hills Residential League

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

South Portland-Marquam Hill Analysis Area

Services and Amenities

Population: 8,600 people (4,700 households)
Land Area: 2.5 sq. miles (3,400 people per sq. mile)

Commercial Districts

The area's primary concentration of commercial services is located along SW Macadam, which includes the Johns Landing shopping area.

Grocery stores: 1

Community Amenities

Community Centers: None (Fulton Park Community Center adjacent to southwest edge of analysis area)

Libraries: None

Parks and Open Spaces: 396 acres – including Council Crest, Duniway, Lair Hill and Willamette parks, Willamette Moorage, and Terwilliger Boulevard Parkway.

Tree Canopy Coverage: 56%

Public Schools: None

Colleges (campus): 2 (Oregon Health & Science University, National College of Naturopathic Medicine)

Hospitals: 4 (Oregon Health & Science University, Doernbecher Children's Hospital, Shriners Hospital, and the Veterans Hospital)

Farmers Markets: 1 (OHSU Farmers Market)

Transit Centers/Stations: None (no light rail stations or TriMet transit centers, but includes upper terminal of the Portland Aerial Tram)

Walkable Access Score: 31 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

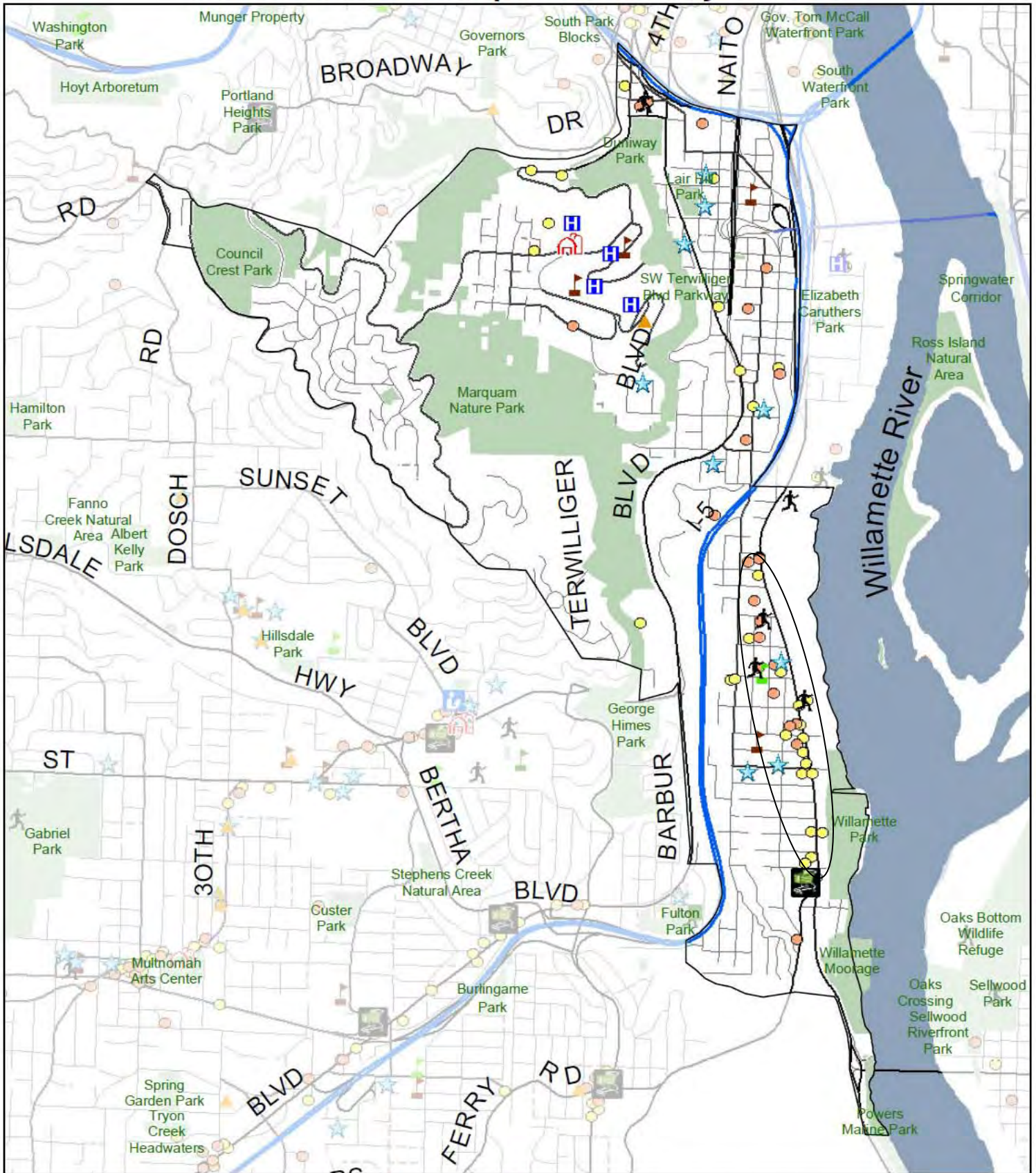
Percentage of households:	
Within 1/2 mile of a park:	56%
Within 1/2 mile of a public elementary school:	0%
Within 3 miles of a full-service community center:	55%
Within 1/2 mile of a full-service grocery store:	7%
Within 1/4 mile of a frequent service transit stop:	23%

Neighborhood and Business Associations

Neighborhood Associations: South Portland, Homestead, and Healy Heights, and part of the Southwest Hills Residential League

Business Associations: South Portland Business Association

South Portland-Marquam Hill Analysis Area

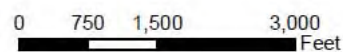


Services and Amenities

- Type 1 Commercial
- Places of Worship
- Public HS
- Type 2 Commercial
- Farmers Markets
- Public K-8
- Fitness Centers
- Libraries
- Private Schools
- Grocery Stores
- Community Centers
- Daycare Centers



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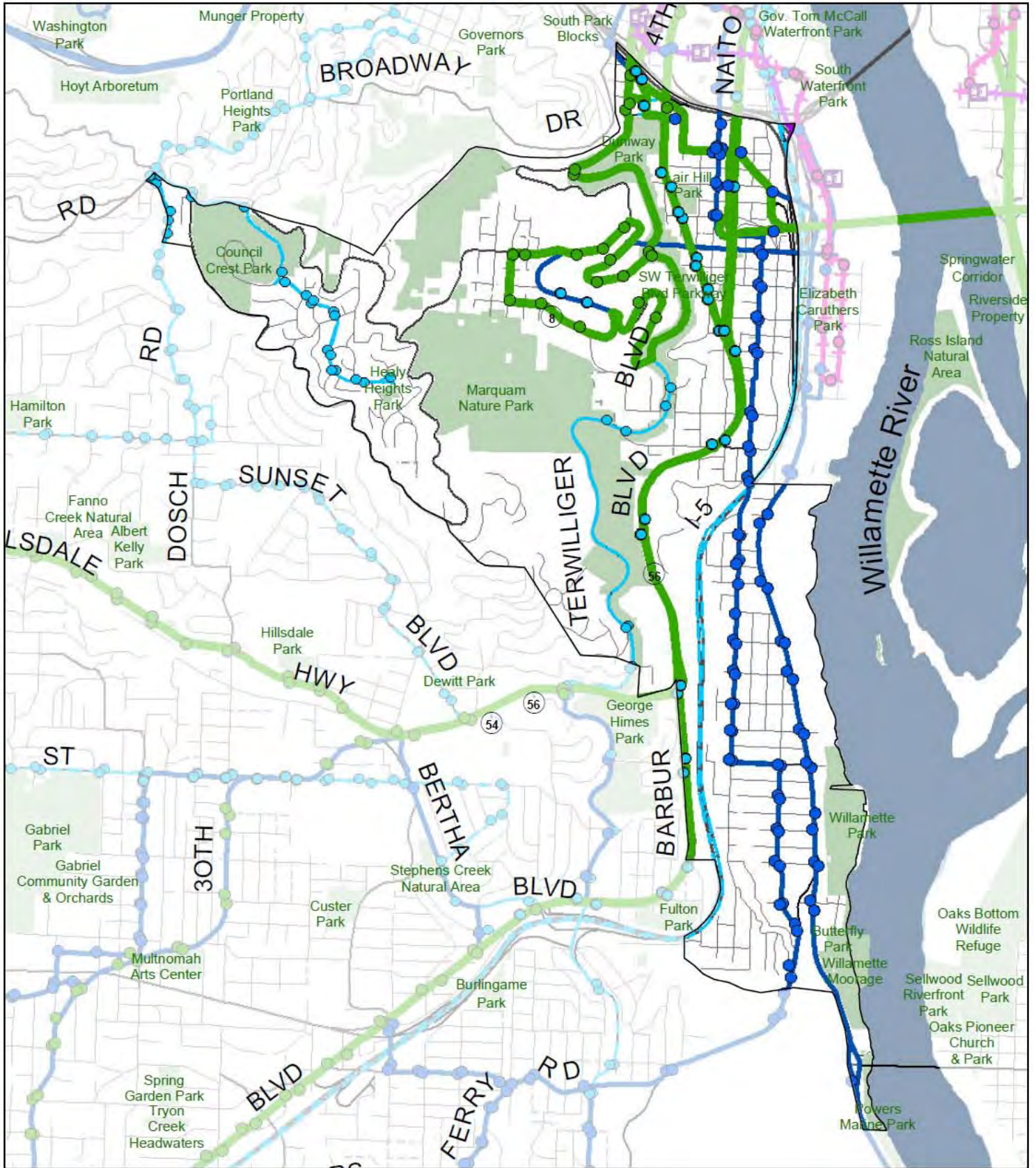


March 25, 2011

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commercial data from InfoUSA 2008

South Portland-Marquam Hill Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



0 750 1,500 3,000 Feet

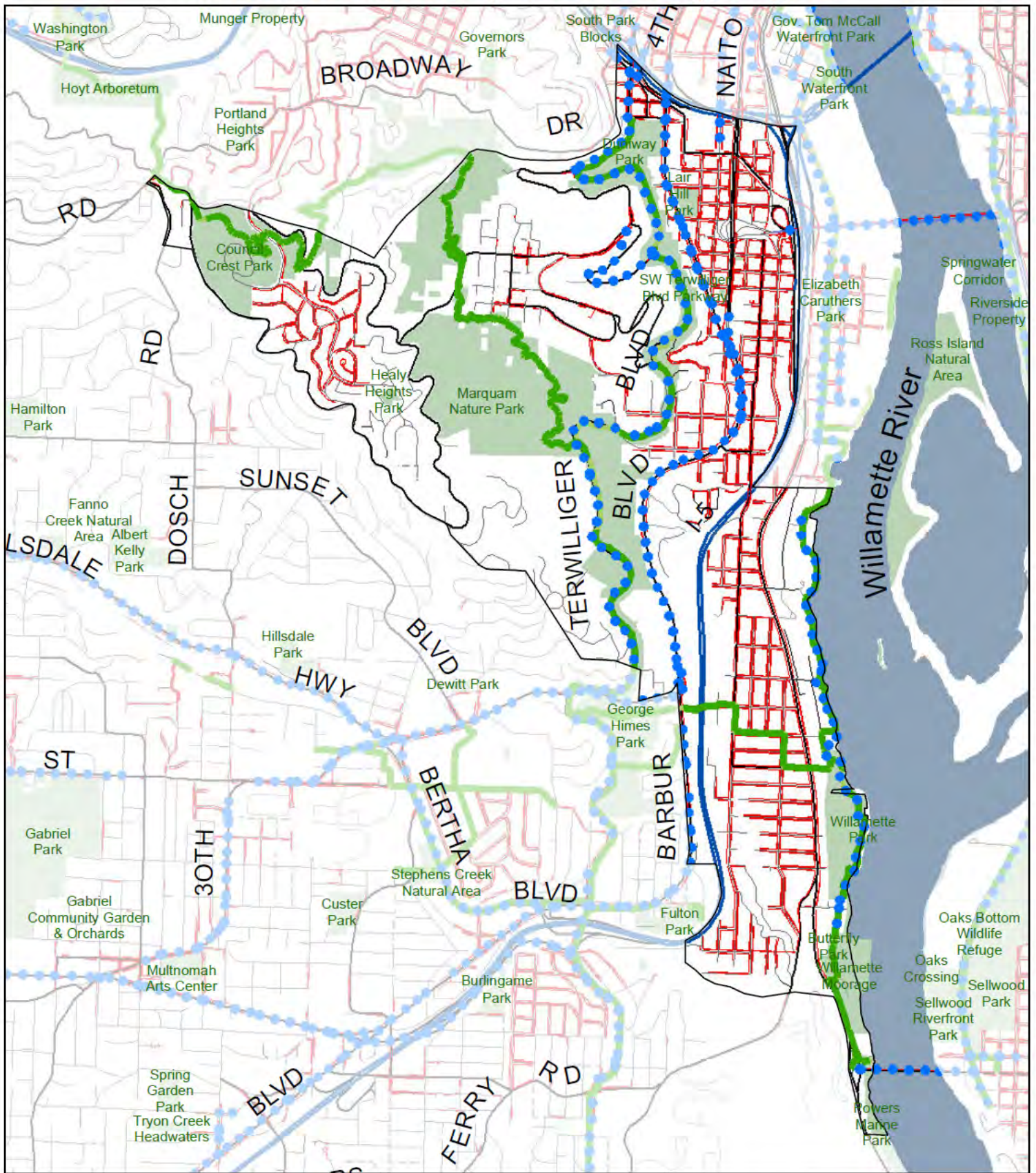


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May 12, 2011

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South Portland-Marquam Hill Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

South Portland-Marquam Hill Analysis Area

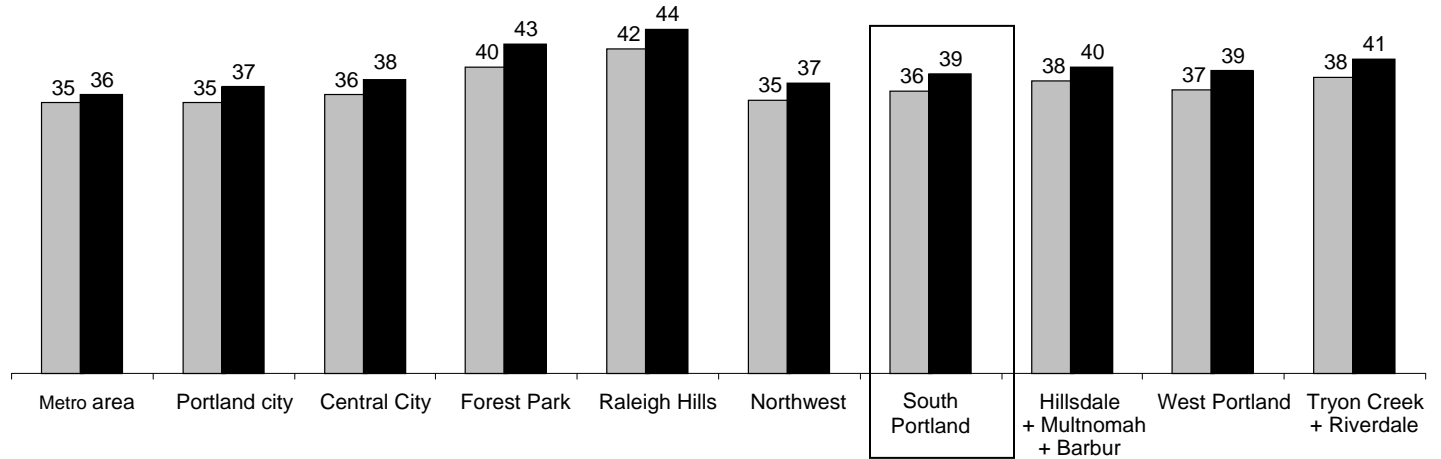
Demographics (2000 – 2010)

Population

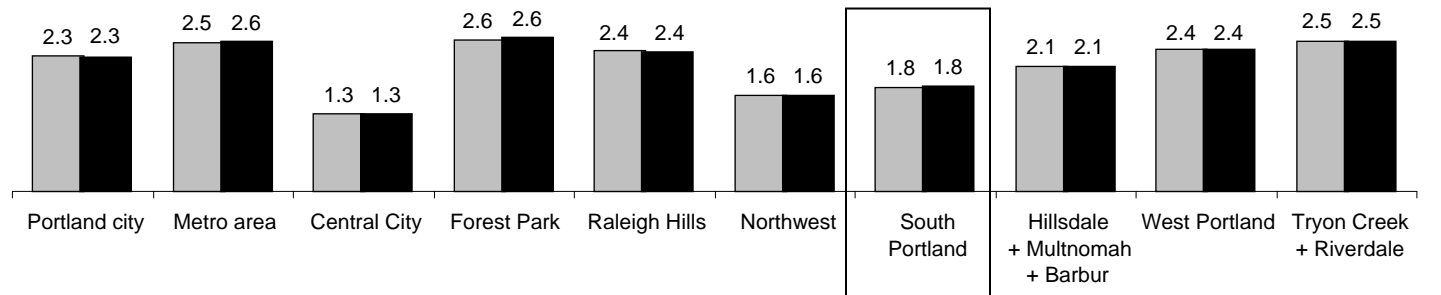
	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	2,226,000	585,000	30,931	8,424	15,446	21,794	8,560	19,601	10,836	9,668
2000	1,927,881	529,121	19,202	5,279	15,485	20,014	8,136	18,674	10,481	8,884
% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

2000 2010

Median Age

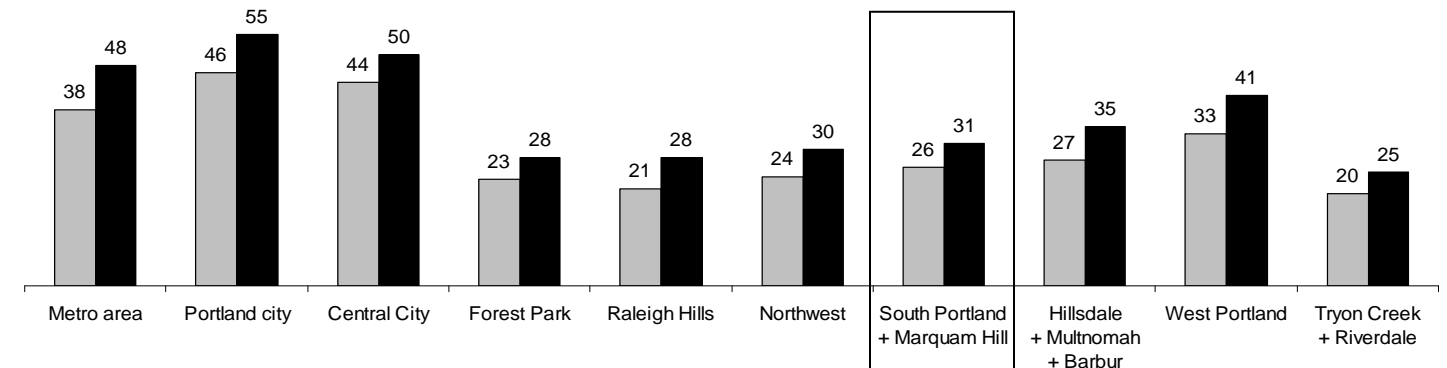


Average Household Size

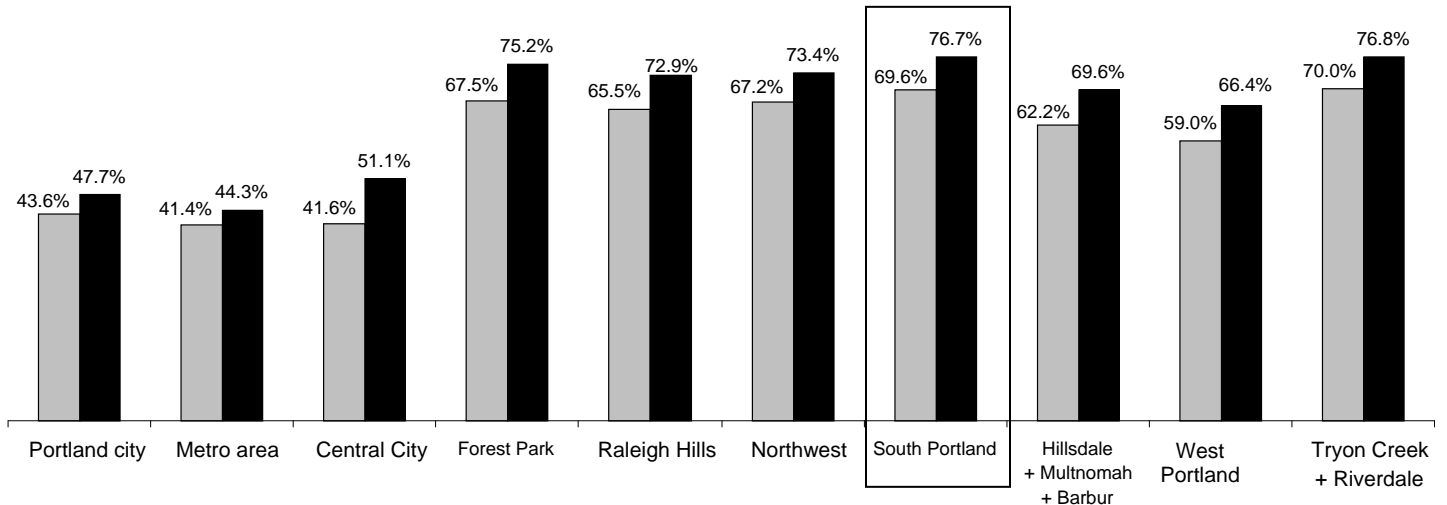


Diversity Index

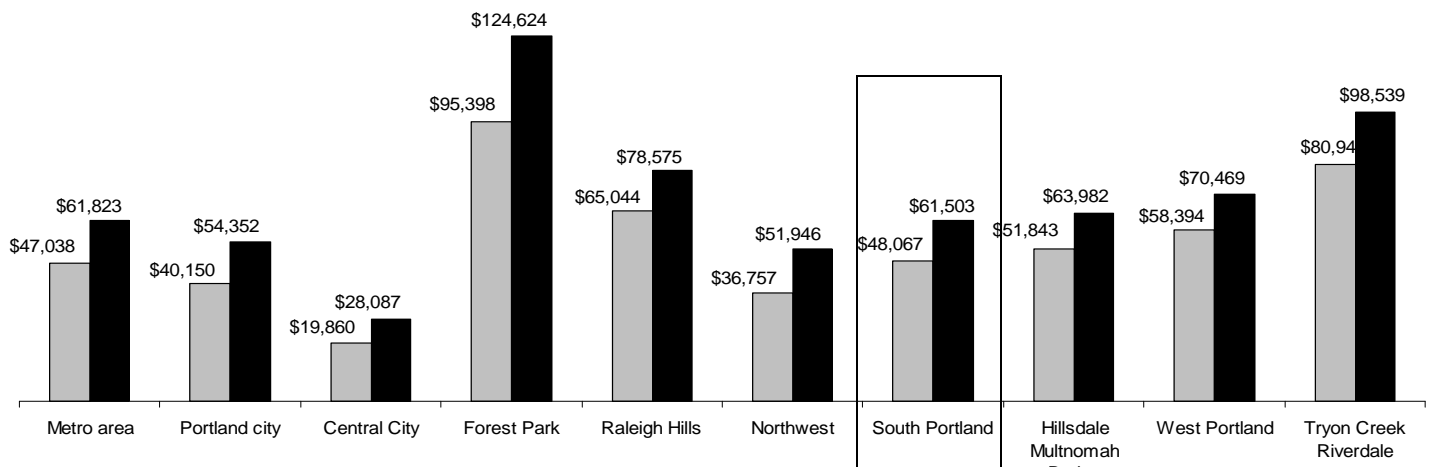
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



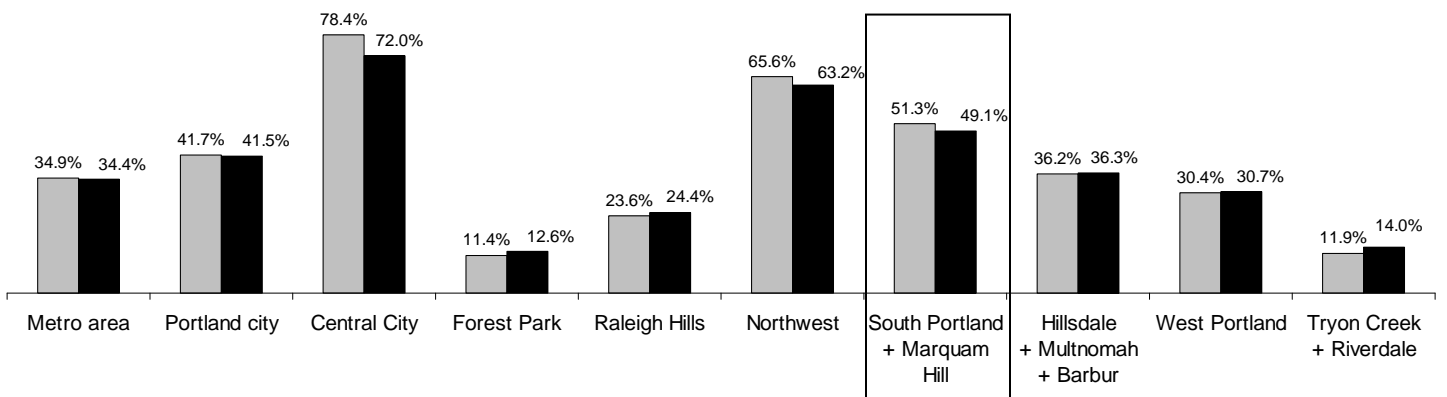
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



South Portland-Marquam Hill Analysis Area

Commercial Real Estate Indicators

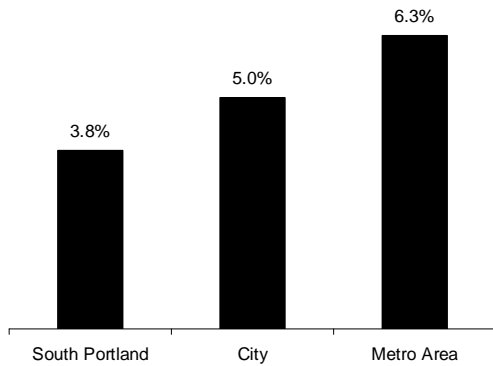
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

So. Portland	City	Metro Area
574,840	51,937,895	107,875,146

Retail Vacancy



Retail Rents

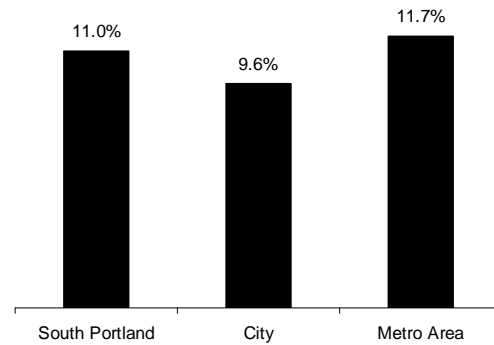


RETAIL

Square Feet

So. Portland	City	Metro Area
1,941,755	54,348,765	92,465,455

Office Vacancy



Office Rents



OFFICE SPACE

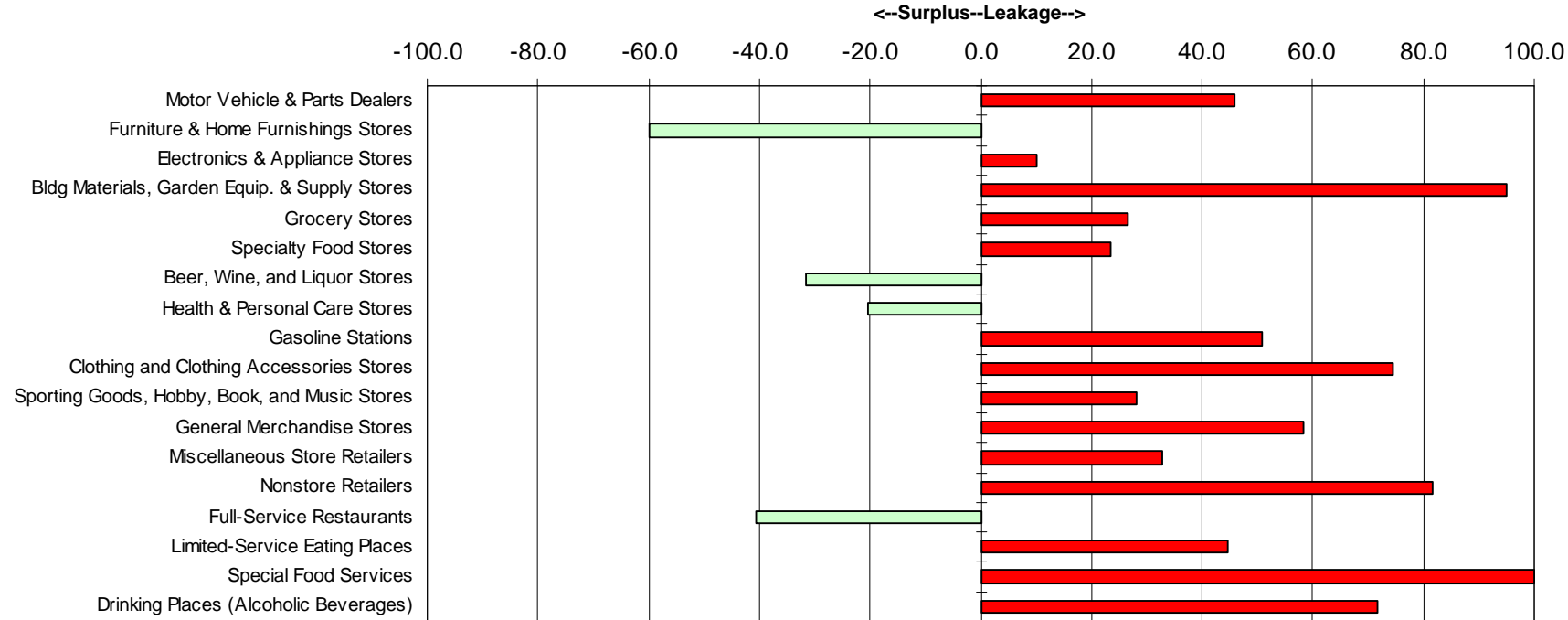
South Portland-Marquam Hill Analysis Area

Retail Market Profile

Retail Gap = \$61 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$157,678,732	\$96,387,165	\$61,291,567	24.1	119
Total Retail Trade (NAICS 44-45)	\$133,926,797	\$74,038,281	\$59,888,516	28.8	76
Total Food & Drink (NAICS 722)	\$23,751,935	\$22,348,884	\$1,403,051	3.0	43

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



South Portland-Marquam Hill Analysis Area

Employment

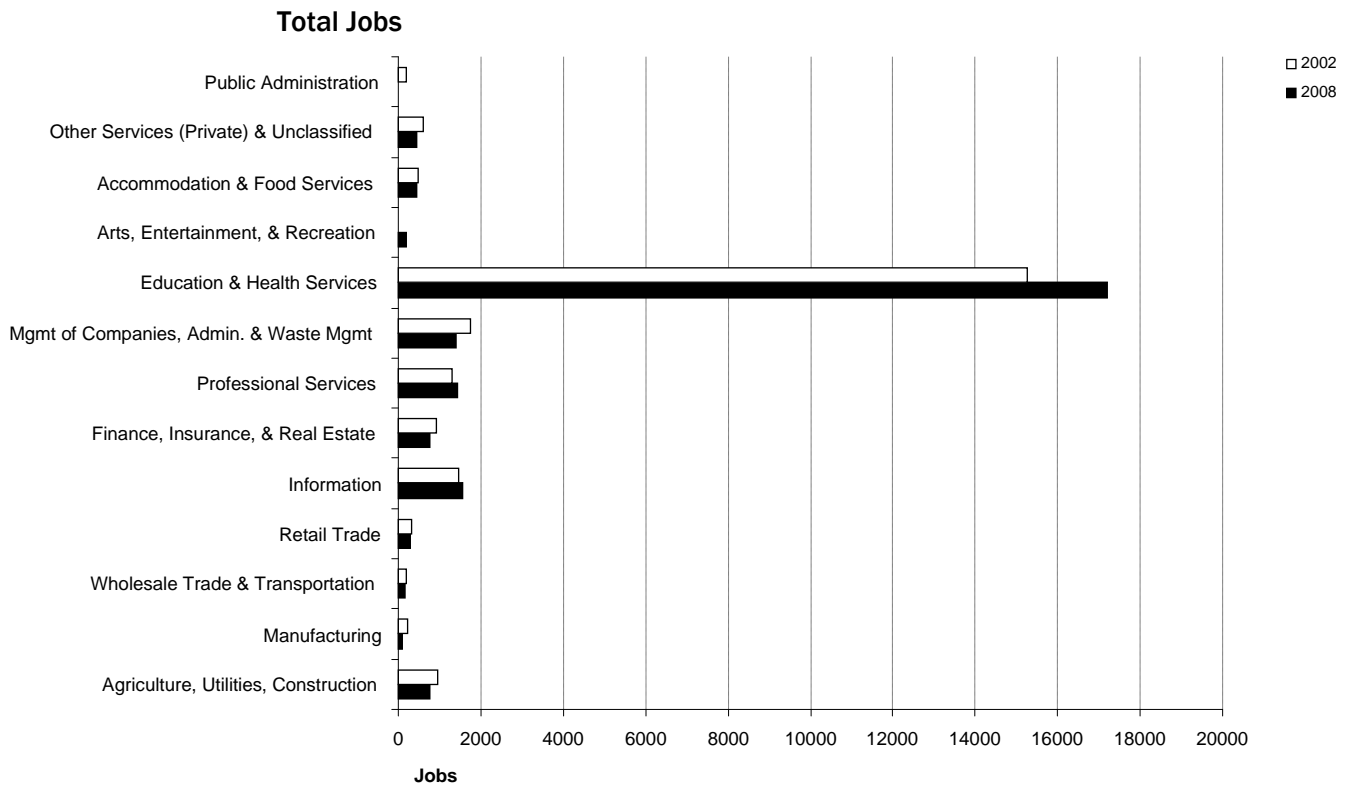
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

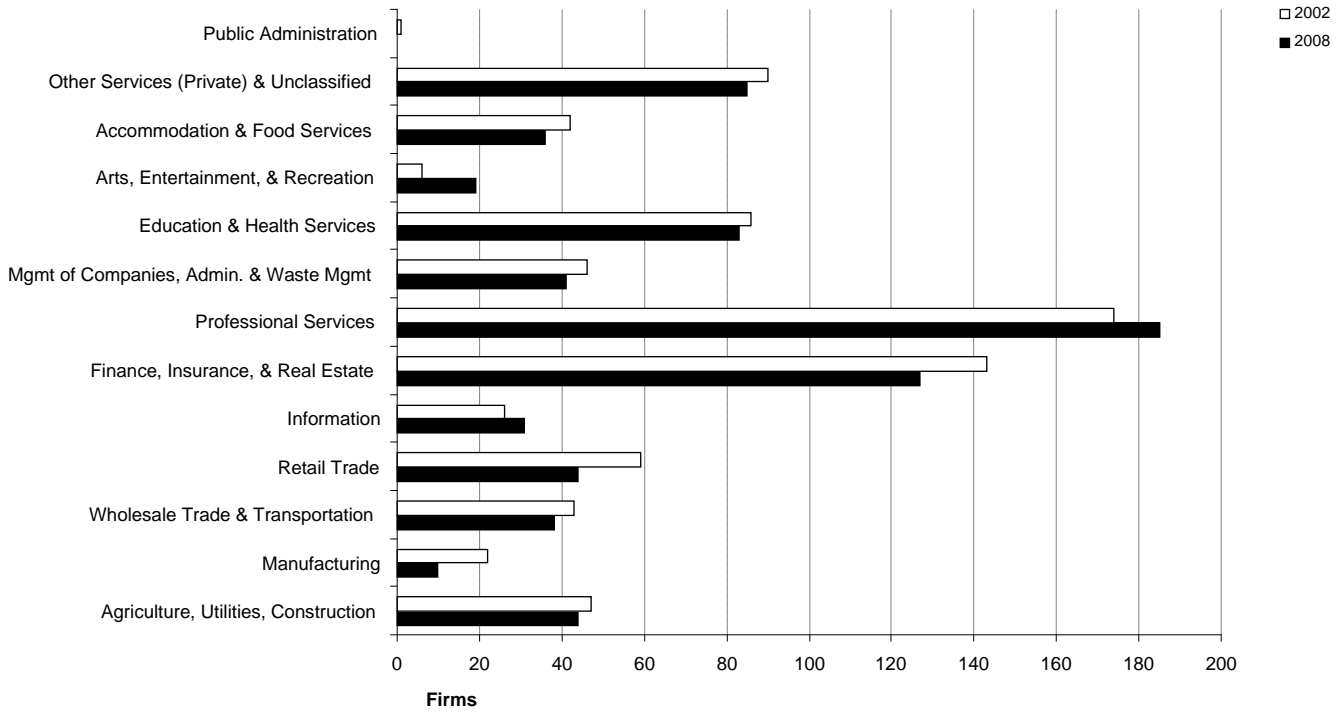
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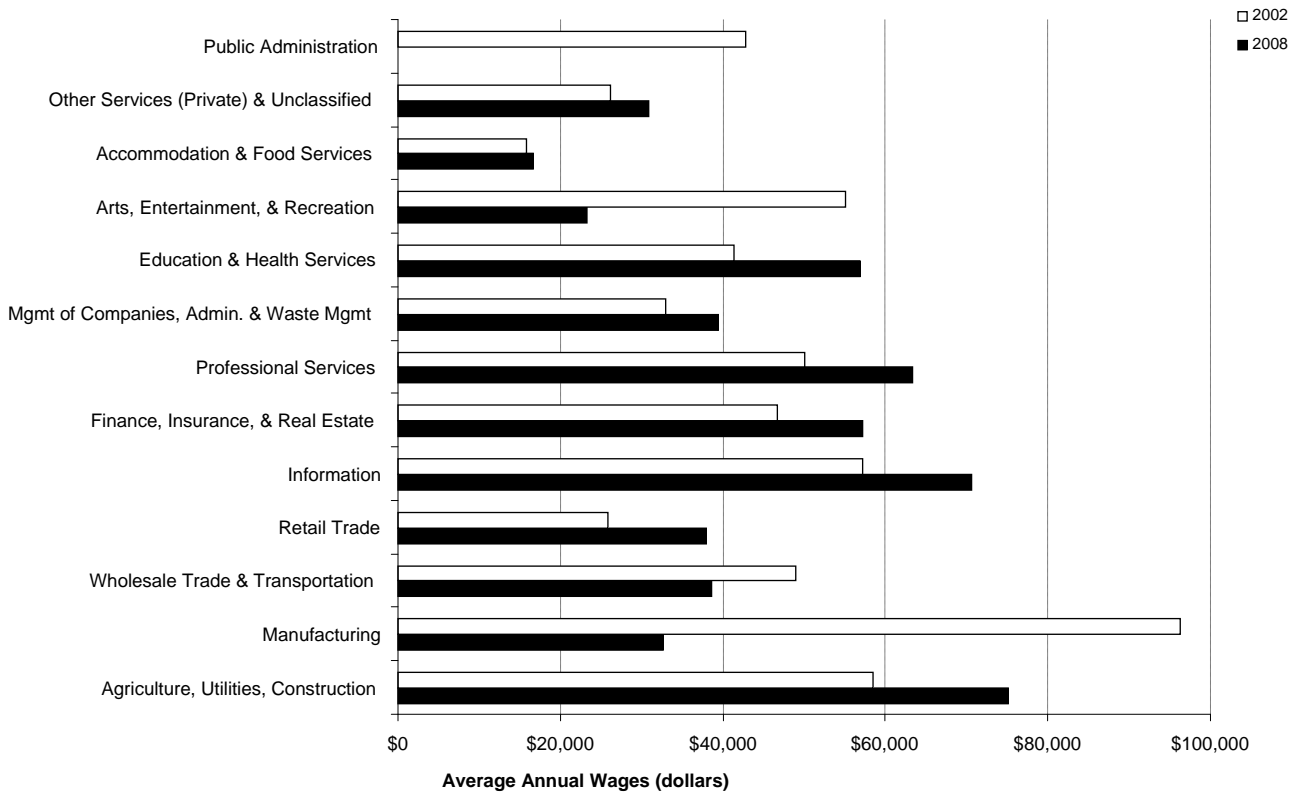
	2002	2008	change
Total Jobs	23,661	24,758	+1,094
Total Firms	785	743	- 42
Average Annual Wages	\$42,584	\$56,058	+13,474



Total Firms



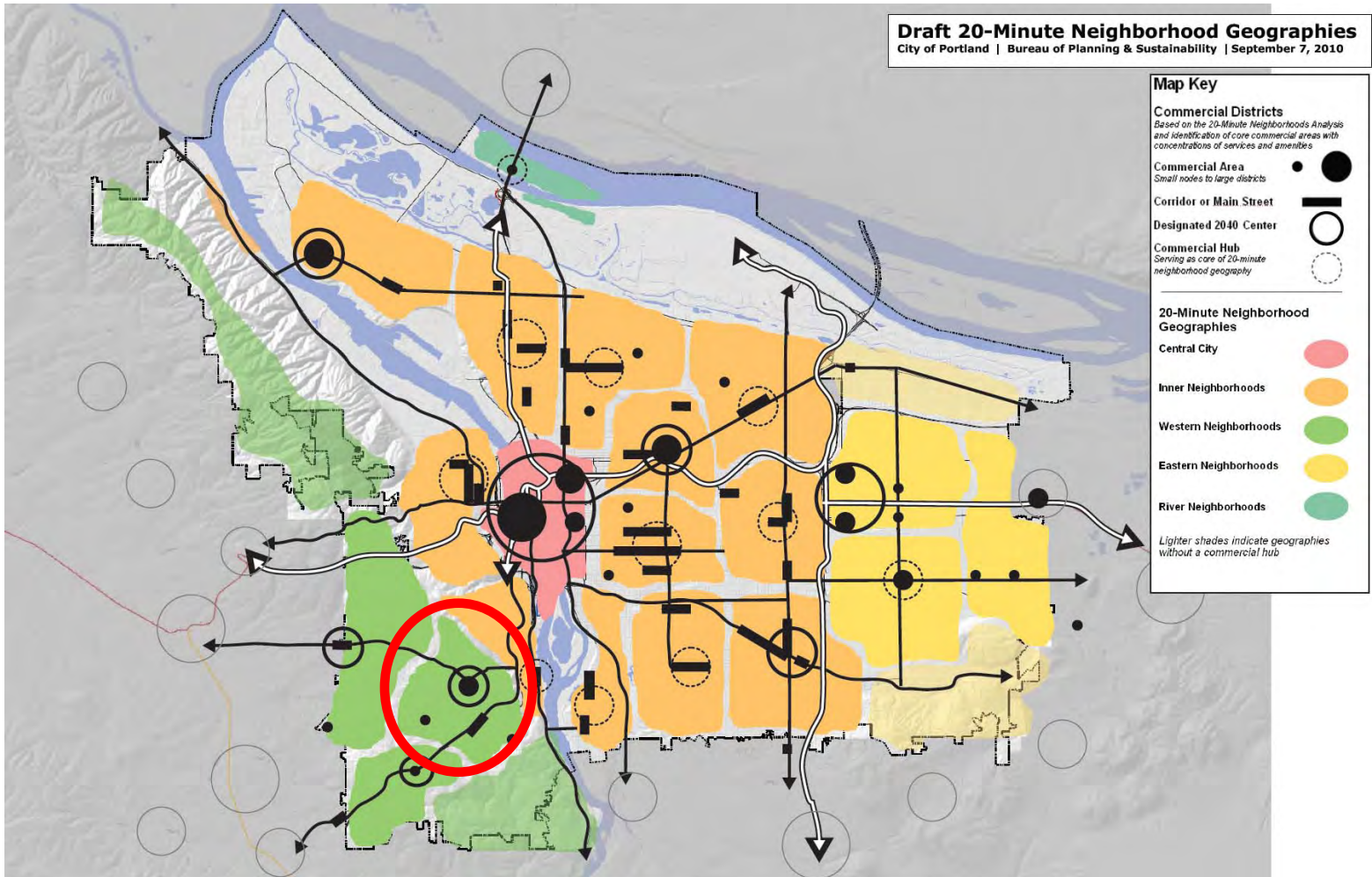
Average Annual Wages



Hillsdale-Multnomah-Barbur Analysis Area

Including Hillsdale, Multnomah, South Burlington, and part of the Markham neighborhood

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Hillsdale-Multnomah-Barbur Analysis Area

Services and Amenities

*Population: 19,600 people (9,000 households)
Land Area: 4.3 sq. miles (4,600 people per sq. mile)*

Commercial Districts

The area's largest concentrations of commercial services are found in the Hillsdale town center and in Multnomah Village. Other services, including supermarkets, are dispersed along SW Barbur, and a small clustering of commercial services is located at SW Terwilliger and Taylors Ferry.

Grocery stores: 4

Community Amenities

Community Centers: 3 (Southwest Community Center and Pool [full service], Multnomah Arts Center, Fulton Park Community Center)

Libraries: 1 (Hillsdale Library)

Parks and Open Spaces: 192 acres – including Gabriel, George Himes, Custer, Burlingame, Fulton, Spring Garden, and Marshall parks; and the Stephens Creek and Foley-Balmer natural areas.

Tree Canopy Coverage: 40%

Public Schools: 1 high school (Wilson)

4 K-8 schools (Rieke, Capitol Hill, and Maplewood* elementary schools, Gray Middle School)

**At edge of analysis area*

Colleges (campus): None

Hospitals: None

Farmers Markets: 1 (Hillsdale Farmers Market)

Transit Centers/Stations: None

Walkable Access Score: 40 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

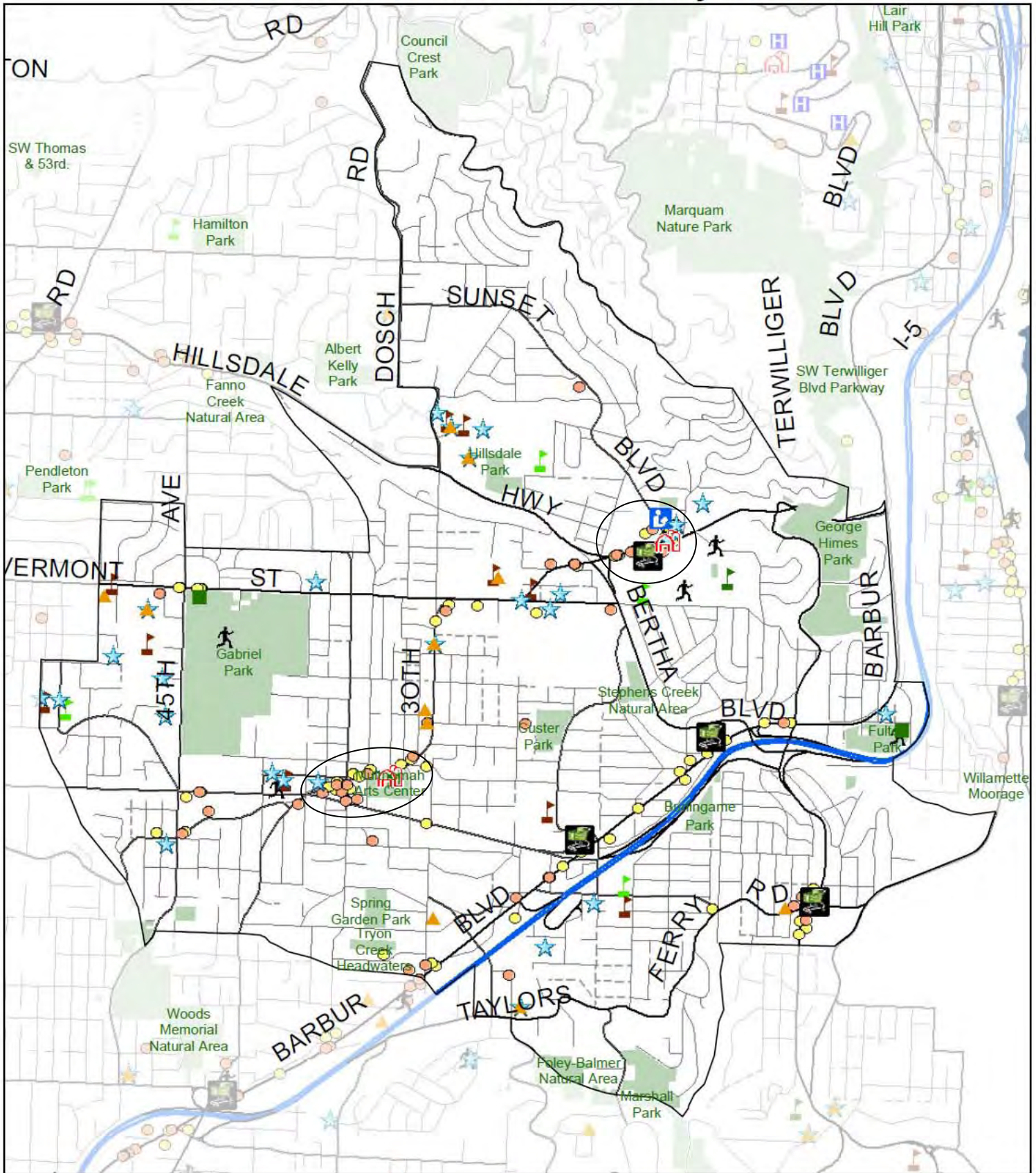
Within 1/2 mile of a park:	75%
Within 1/2 mile of a public elementary school:	20%
Within 3 miles of a full-service community center:	100%
Within 1/2 mile of a full-service grocery store:	18%
Within 1/4 mile of a frequent service transit stop:	7%

Neighborhood and Business Associations

Neighborhood Associations: Hillsdale, Multnomah, South Burlington, and part of Markham

Business Associations: Hillsdale Business and Professional Association, Multnomah Village Business Association

Hillsdale-Multnomah-Barbur Analysis Area

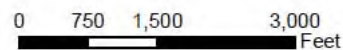


Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Centers



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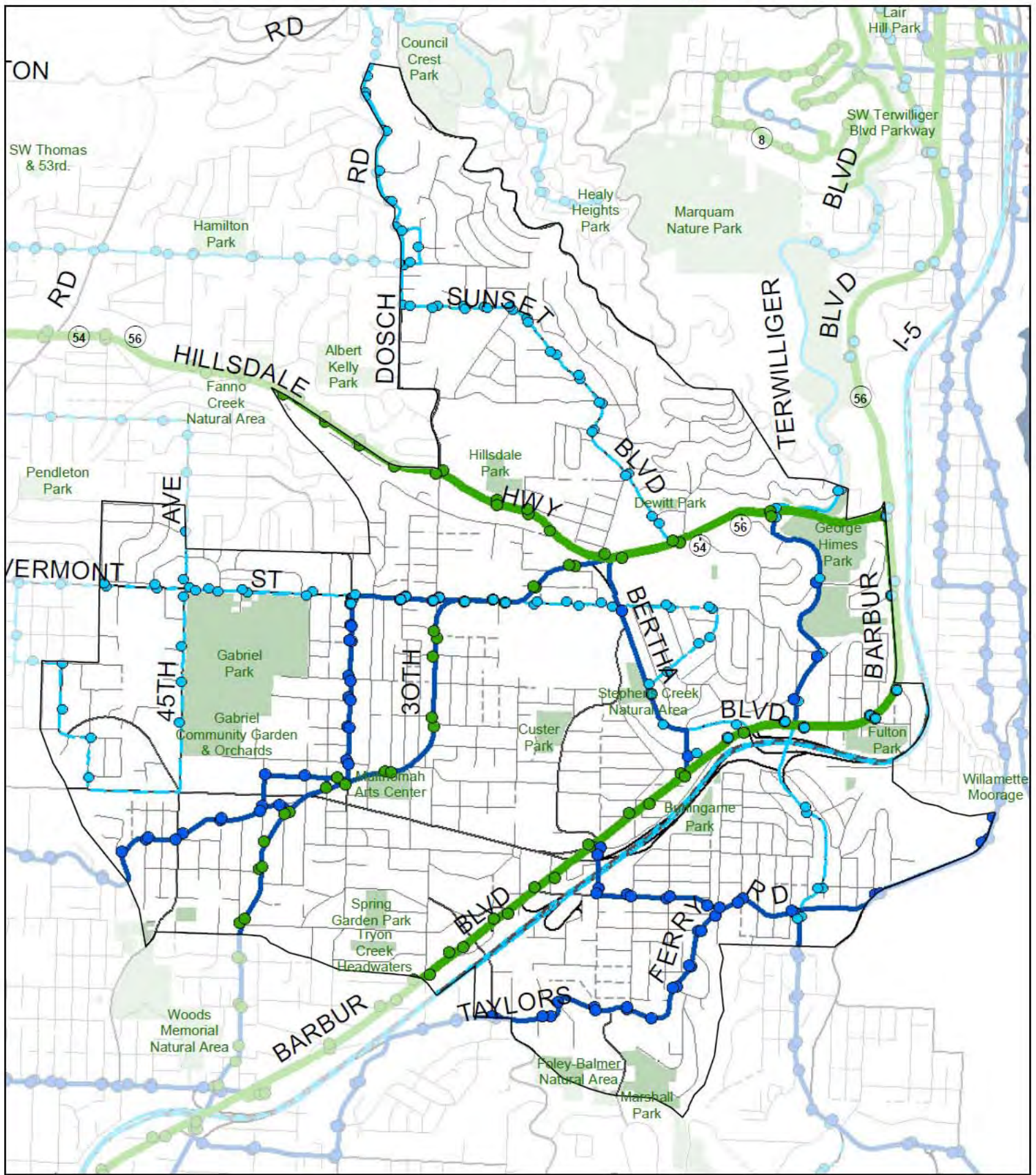


March 25, 2011

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commercial data from InfoUSA 2008

Hillsdale-Multnomah-Barbur Analysis Area



Transit Infrastructure

- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



0 750 1,500 3,000 Feet

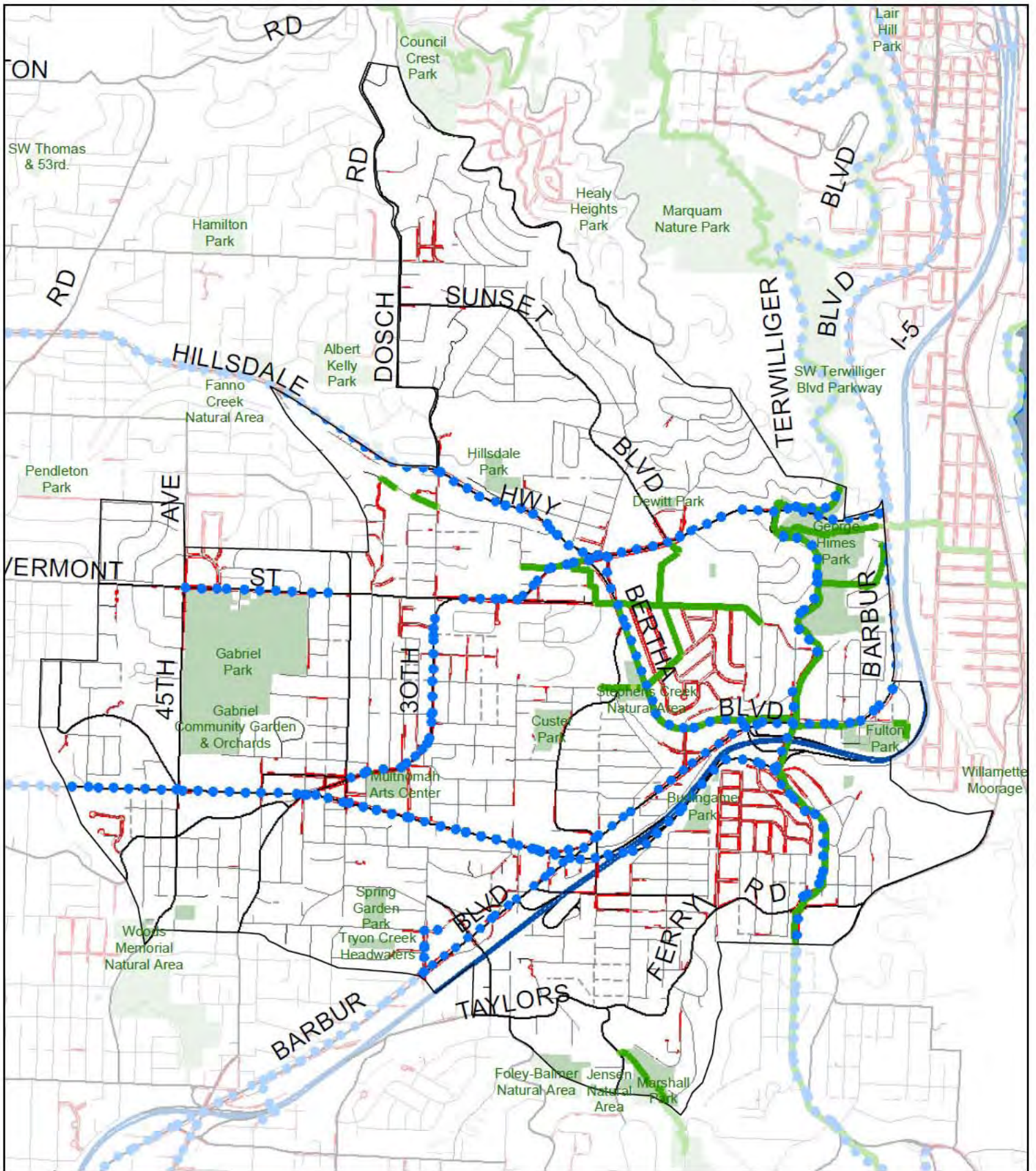


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May 12, 2011

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Hillsdale-Multnomah-Barbur Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

Hillsdale-Multnomah-Barbur Analysis Area

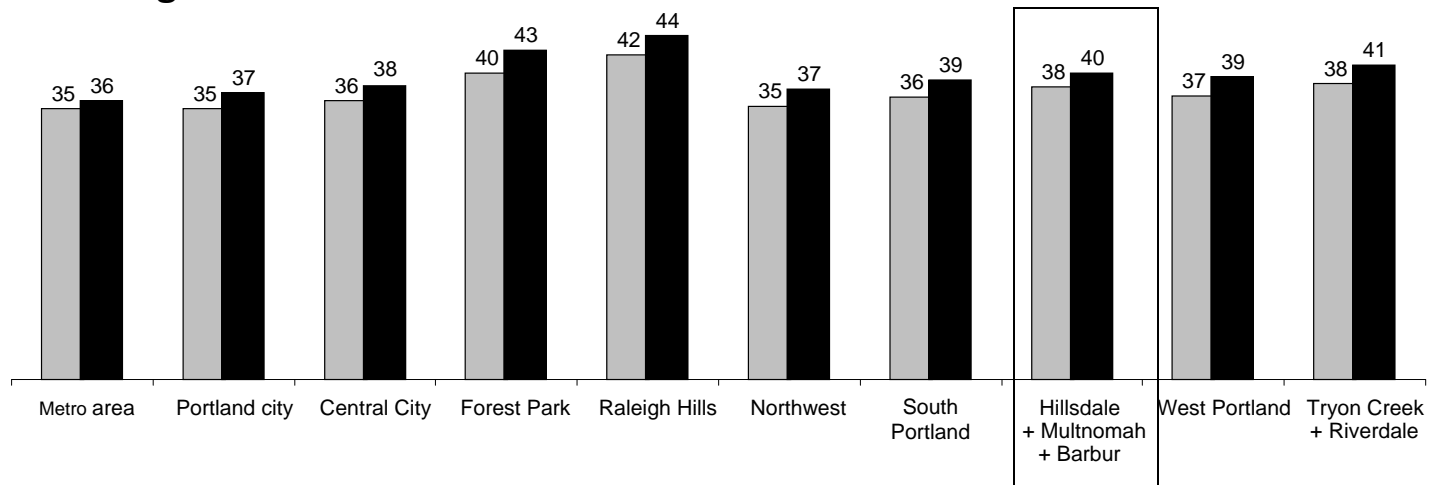
Demographics (2000 – 2010)

Population

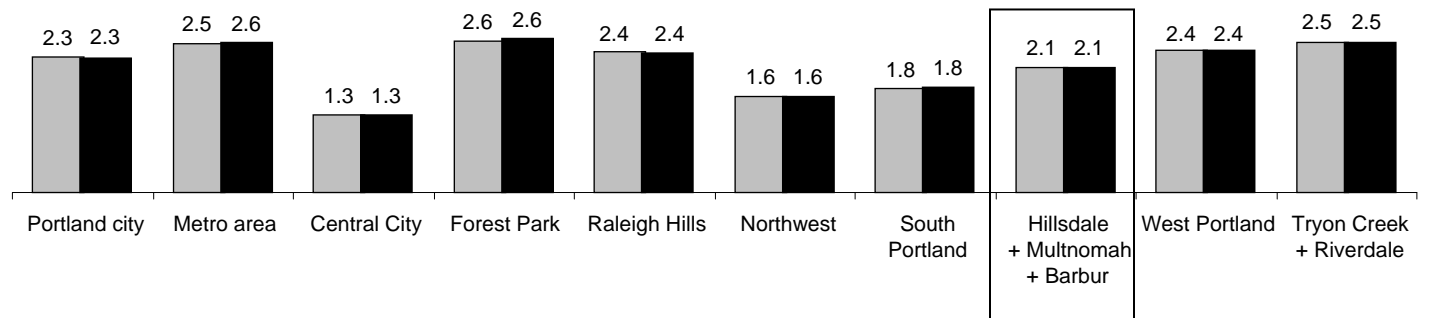
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% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

2000 2010

Median Age

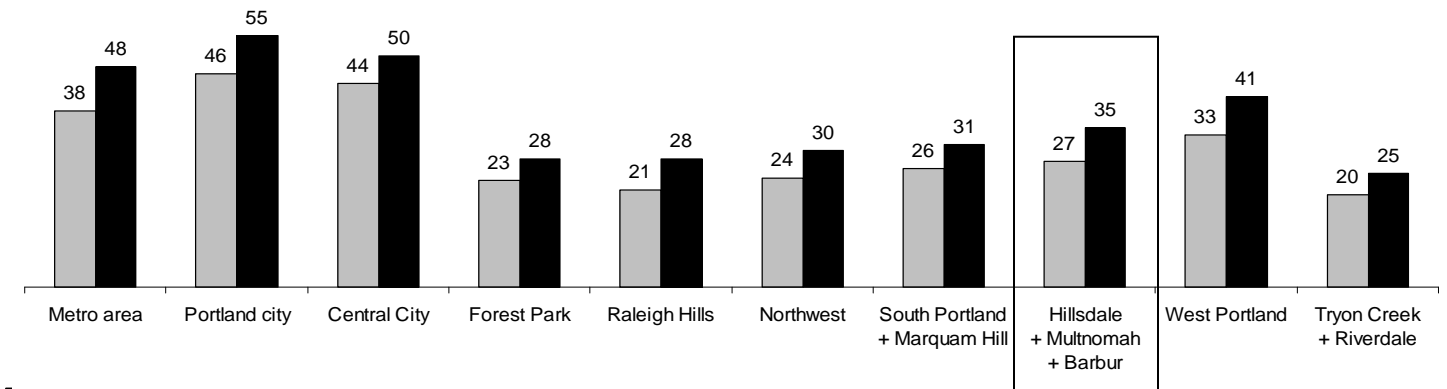


Average Household Size

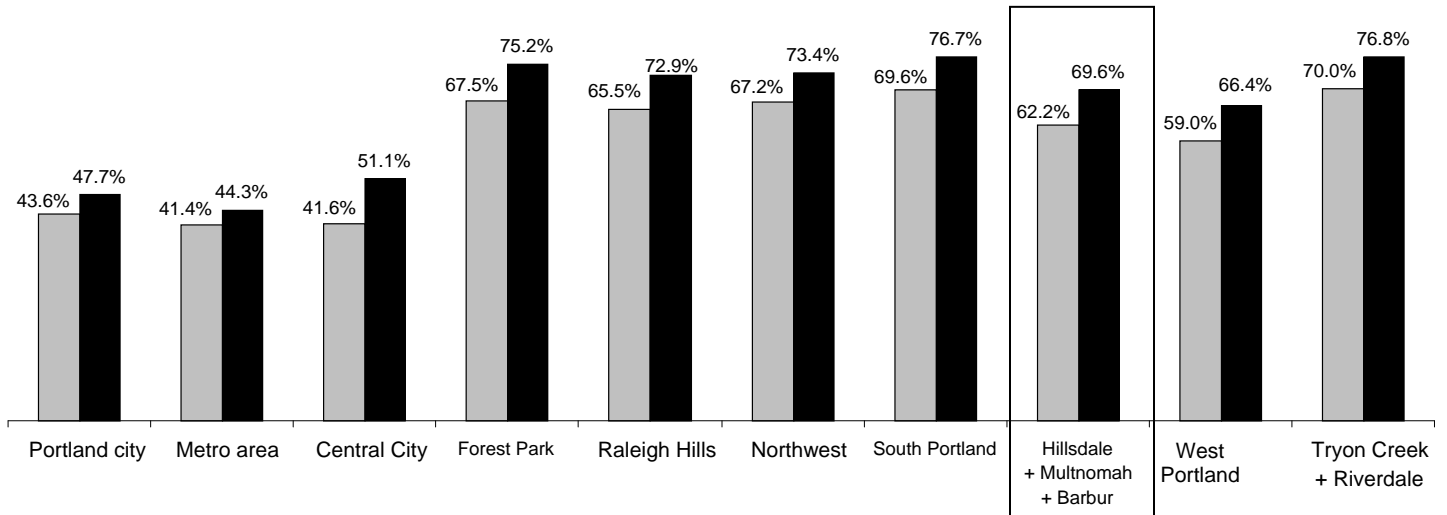


Diversity Index

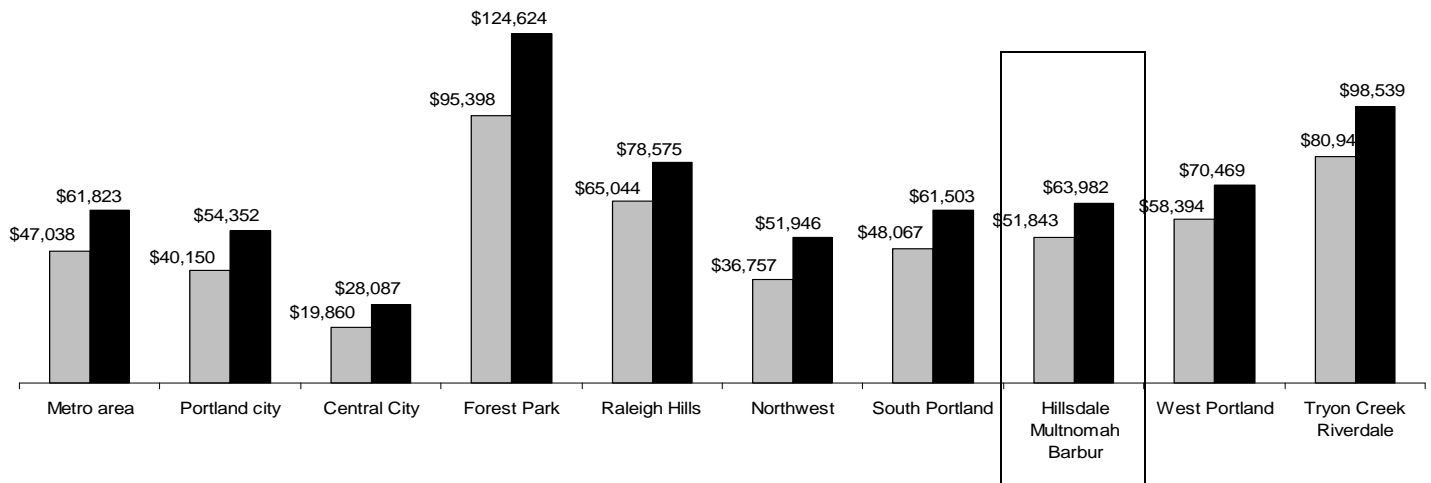
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



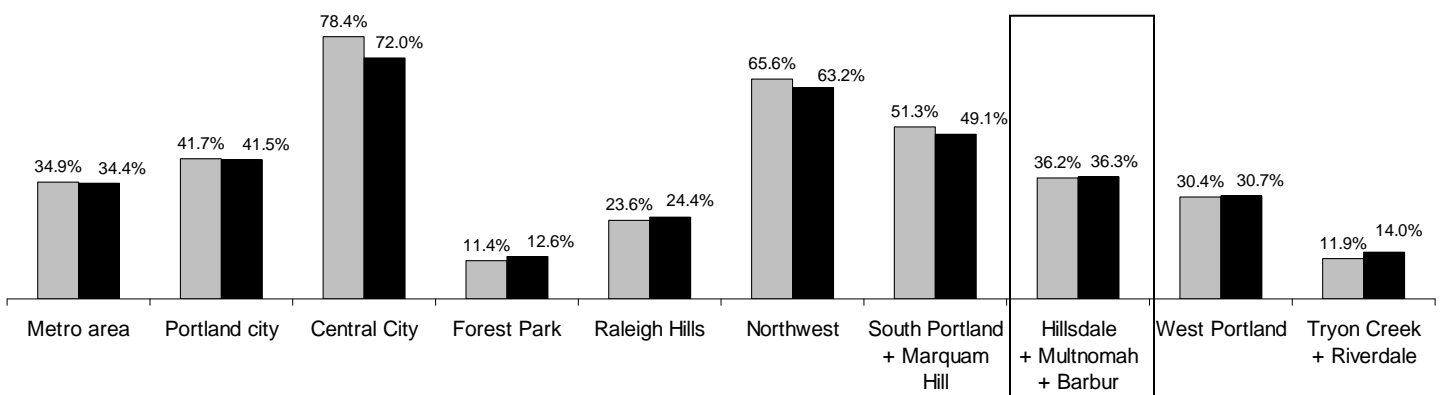
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



Hillsdale-Multnomah-Barbur Analysis Area

Commercial Real Estate Indicators

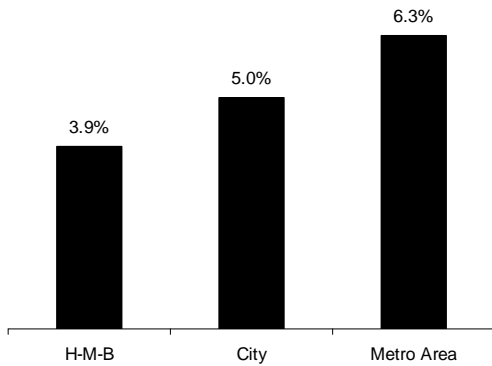
Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

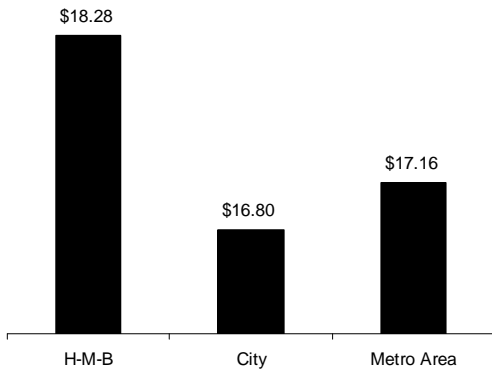
Square Feet

H-M-B	City	Metro Area
369,294	51,937,895	107,875,146

Retail Vacancy



Retail Rents

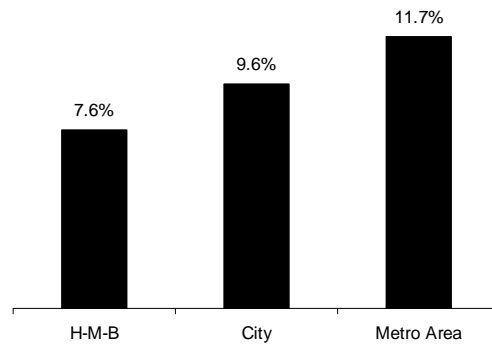


OFFICE SPACE

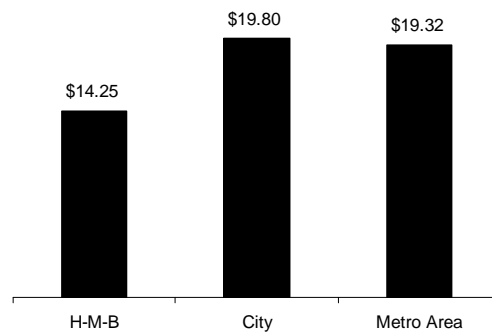
Square Feet

H-M-B	City	Metro Area
228,770	54,348,765	92,465,455

Office Vacancy



Office Rents



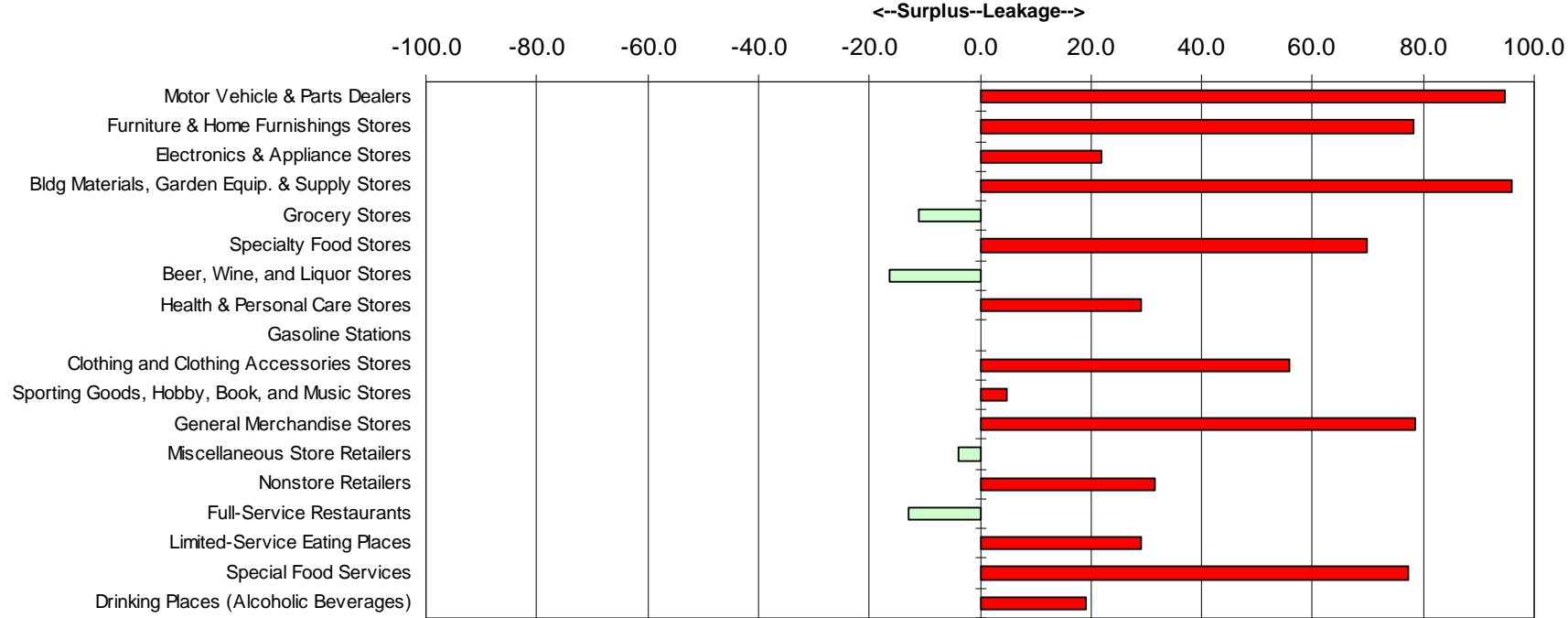
Hillsdale-Multnomah-Barbur Analysis Area

Retail Market Profile

Retail Gap = \$128 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$288,231,738	\$160,363,054	\$127,868,684	28.5	190
Total Retail Trade (NAICS 44-45)	\$246,092,918	\$128,953,648	\$117,139,270	31.2	128
Total Food & Drink (NAICS 722)	\$42,138,820	\$31,409,406	\$10,729,414	14.6	62

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Hillsdale-Multnomah-Barbur Analysis Area

Employment

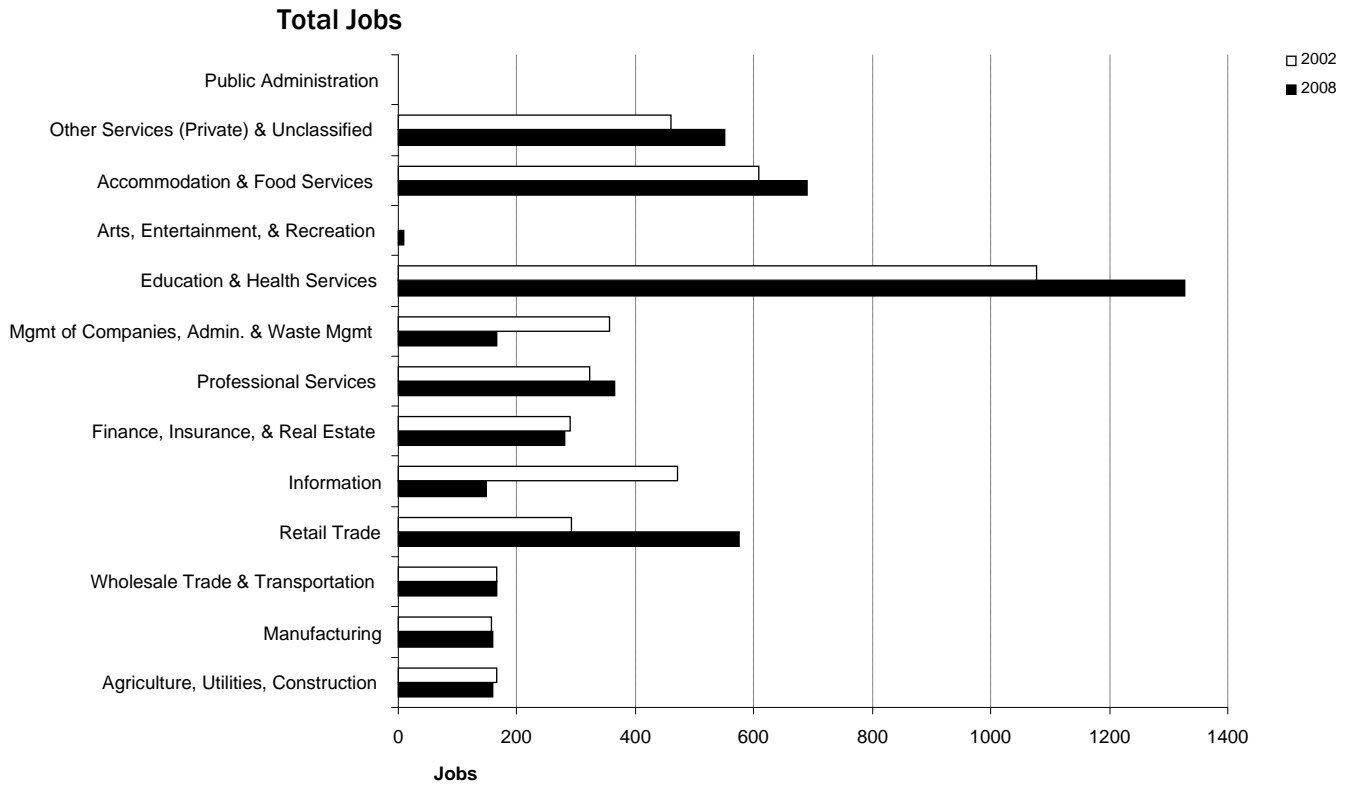
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

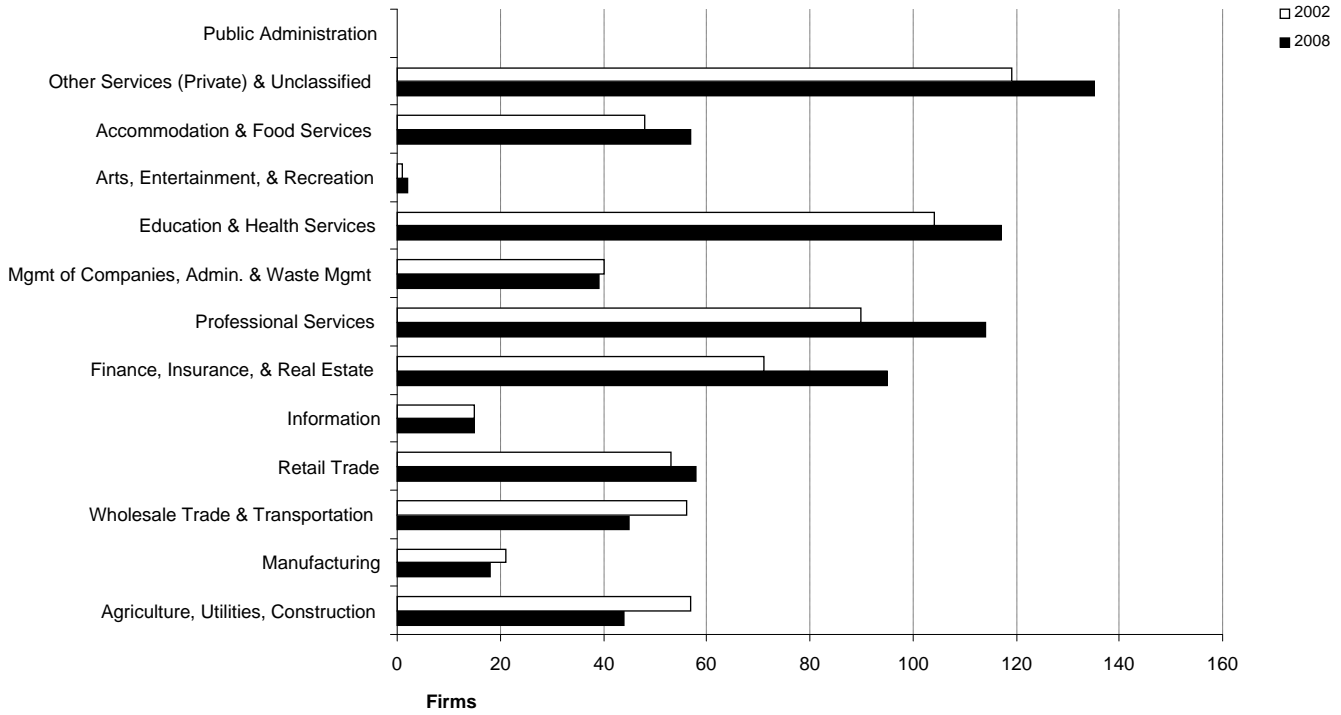
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

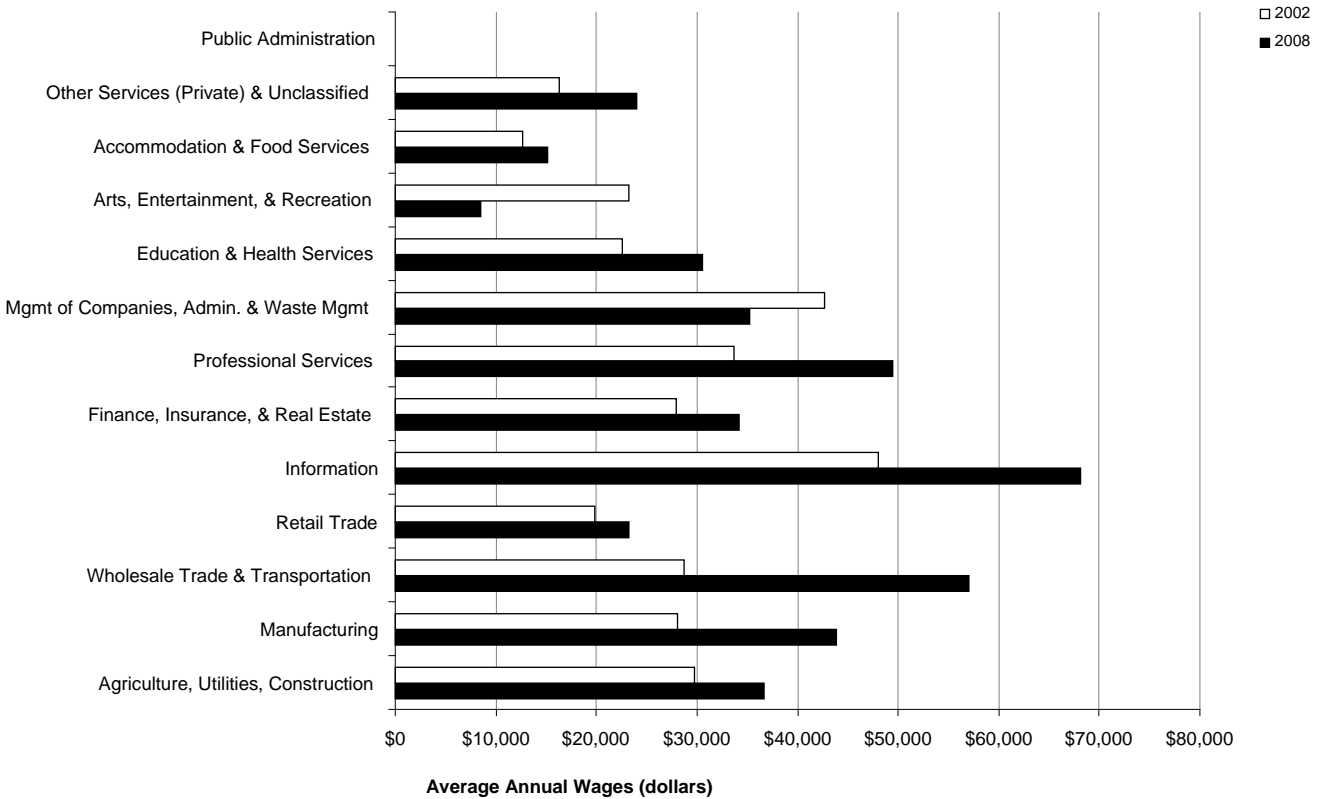
	2002	2008	change
Total Jobs	4,364	4,597	+233
Total Firms	675	739	+64
Average Annual Wages	\$26,057	\$31,254	+5,197



Total Firms



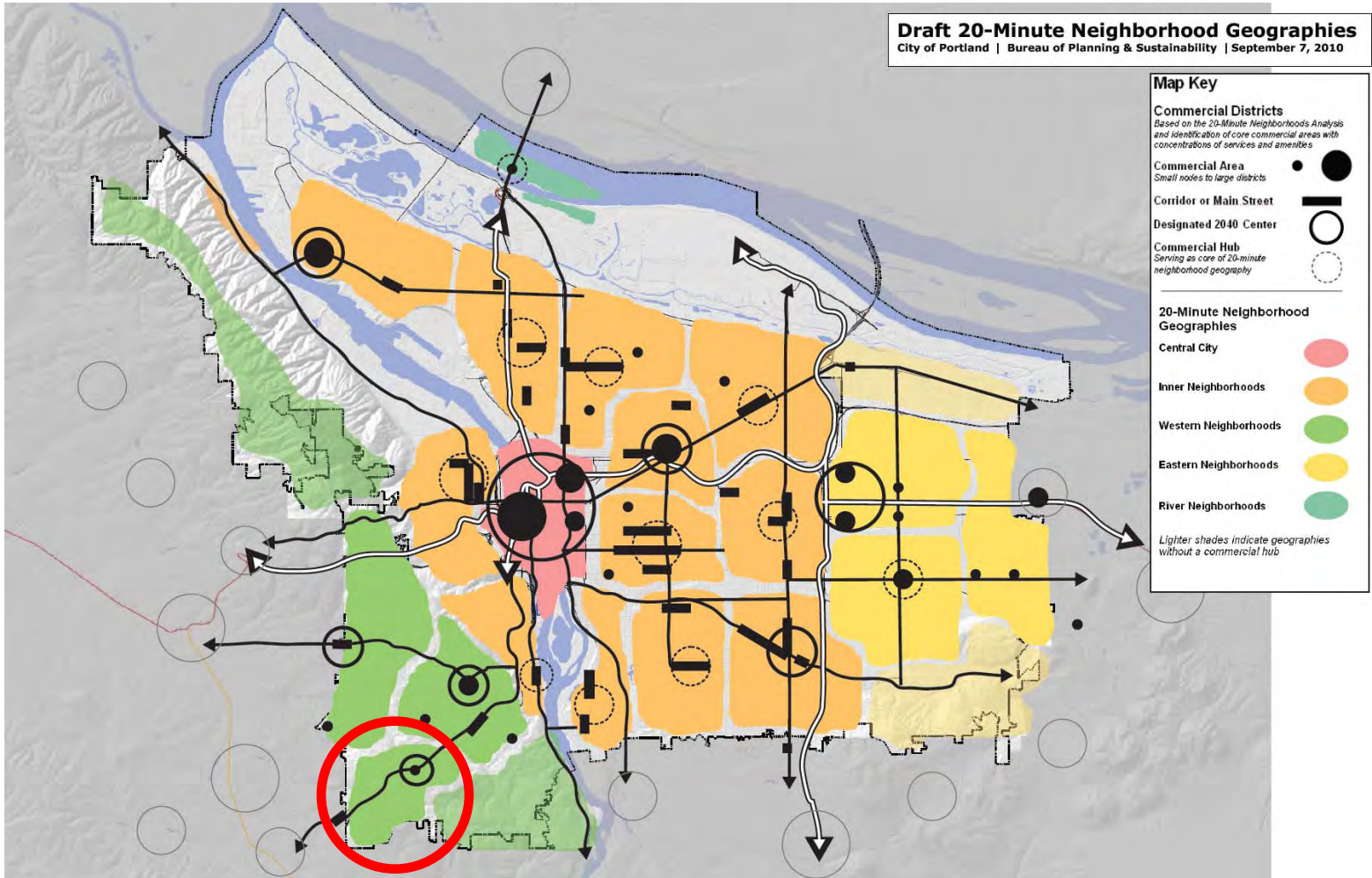
Average Annual Wages



West Portland Analysis Area

Including Crestwood, Far Southwest, West Portland Park, and parts of the Ashcreek and Markham neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

West Portland Analysis Area

Services and Amenities

Population: 11,000 people (4,600 households)
Land Area: 2.6 sq. miles (4,200 people per sq. mile)

Commercial Districts

The area's commercial services are primary located along SW Barbur, with some clustering of services around the intersection with Capitol Highway. A small clustering of commercial services is located at Capitol Highway and SW 49th. Larger concentrations of commercial services are located along SW Barbur just outside the west edge of the analysis area in Tigard.

Grocery stores: 1

Community Amenities

Community Centers: None

Libraries: 1 (Capitol Hill Library)

Parks and Open Spaces: 84 acres – including Dickinson, Sylvania, and Lesser parks, and the Ash Creek, Woods Memorial, and West Portland Park natural areas.

Tree Canopy Coverage: 42%

Public Schools: 3 K-8 schools (Markham and Stephenson* elementary schools, Jackson Middle School)
**At edge of analysis area*

Colleges (campus): Portland Community College - Sylvania

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: 1 (Barbur Boulevard Transit Center)

Walkable Access Score: 35 (out of 100)
(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

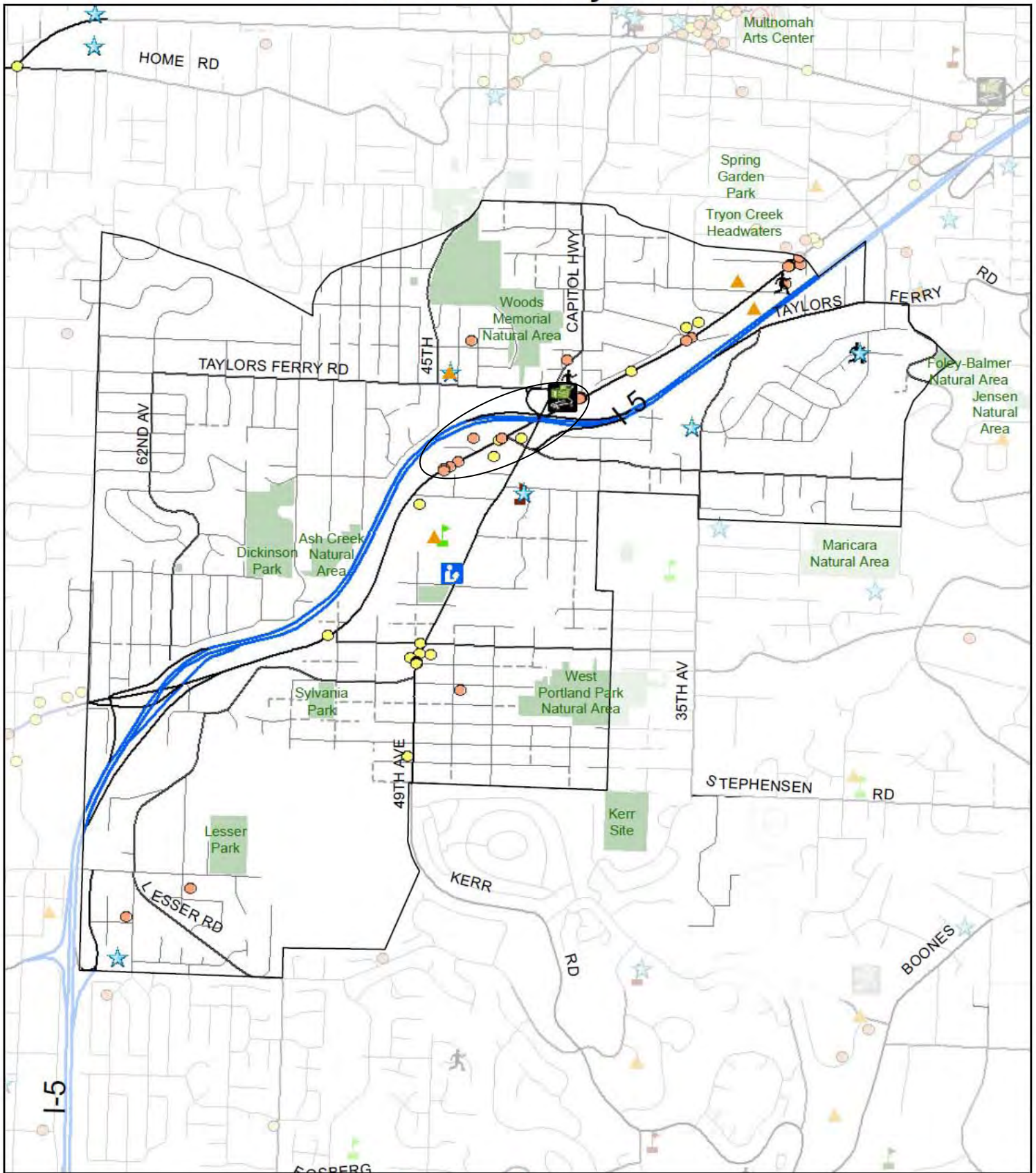
Within 1/2 mile of a park:	82%
Within 1/2 mile of a public elementary school:	19%
Within 3 miles of a full-service community center:	98%
Within 1/2 mile of a full-service grocery store:	13%
Within 1/4 mile of a frequent service transit stop:	12%

Neighborhood and Business Associations

Neighborhood Associations: Crestwood, Far Southwest, West Portland Park, and parts of Ashcreek and Markham

Business Associations: None

West Portland Analysis Area

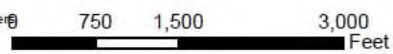


Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Daycare Center



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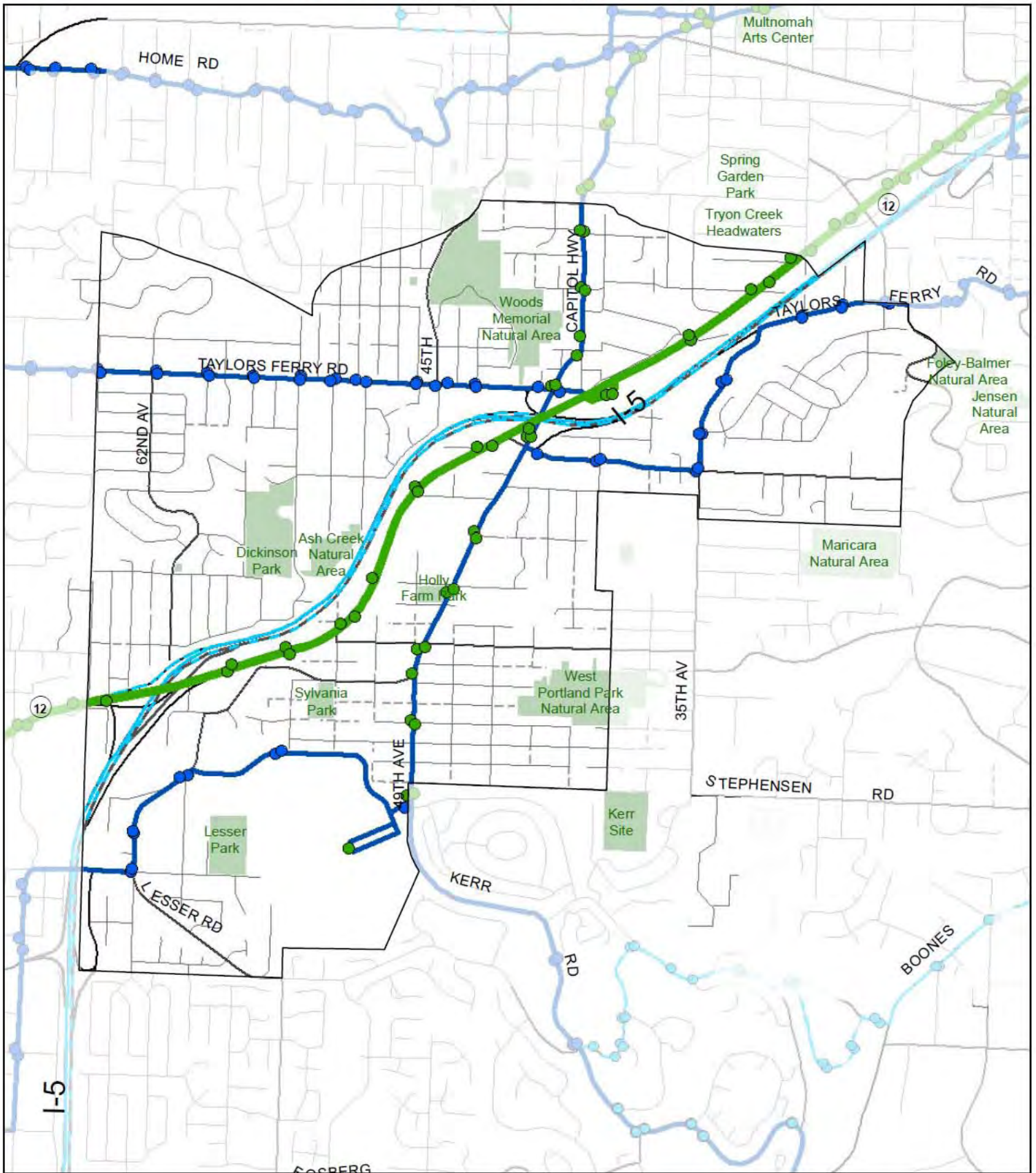


March 25, 2011

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commercial data from InfoUSA 2008

West Portland Analysis Area



Transit Infrastructure

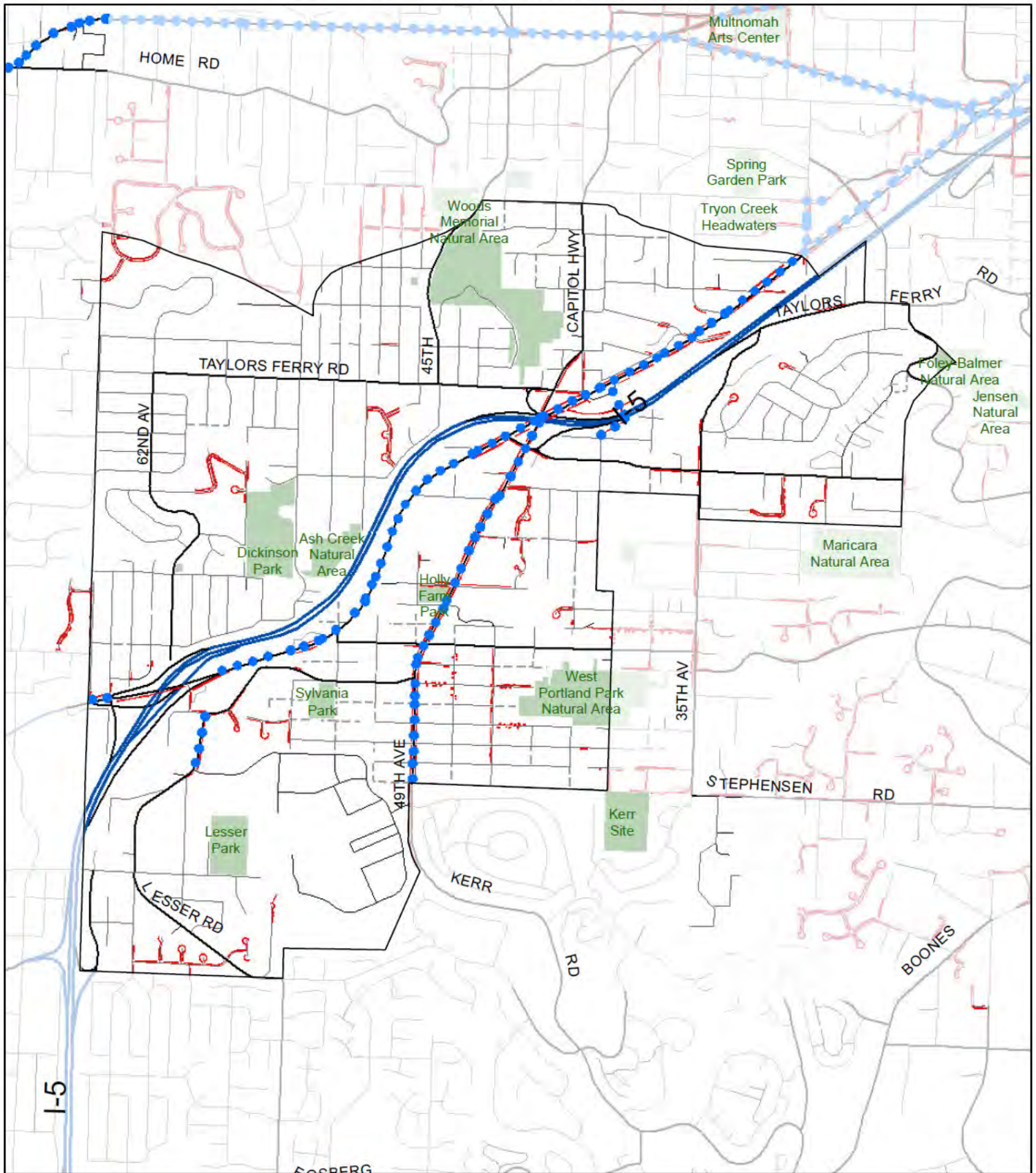
- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service



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West Portland Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



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March 25, 2011

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West Portland Analysis Area

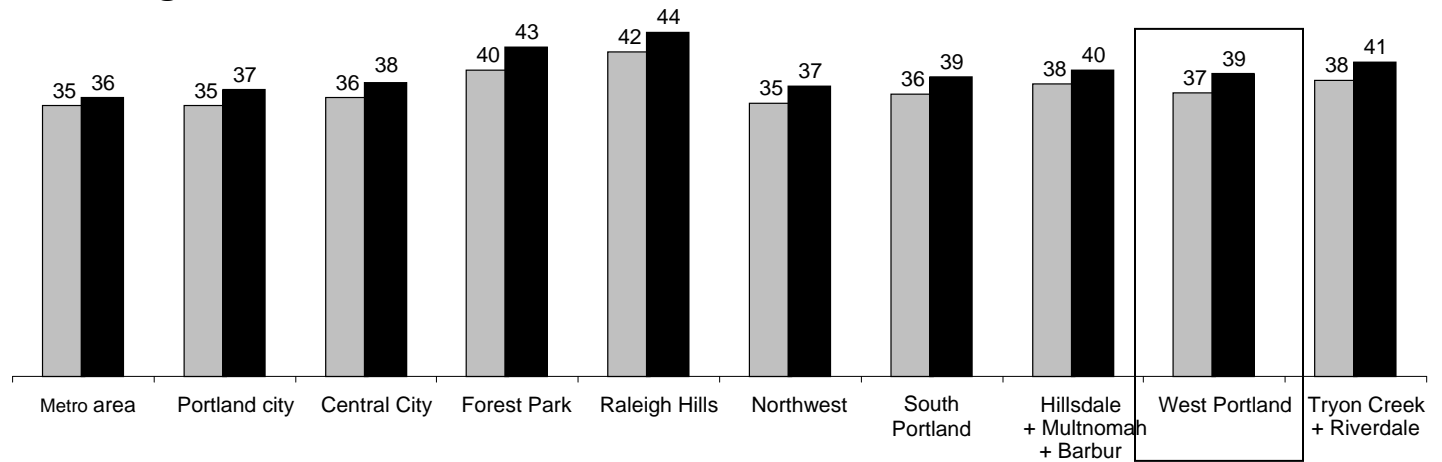
Demographics (2000 – 2010)

Population

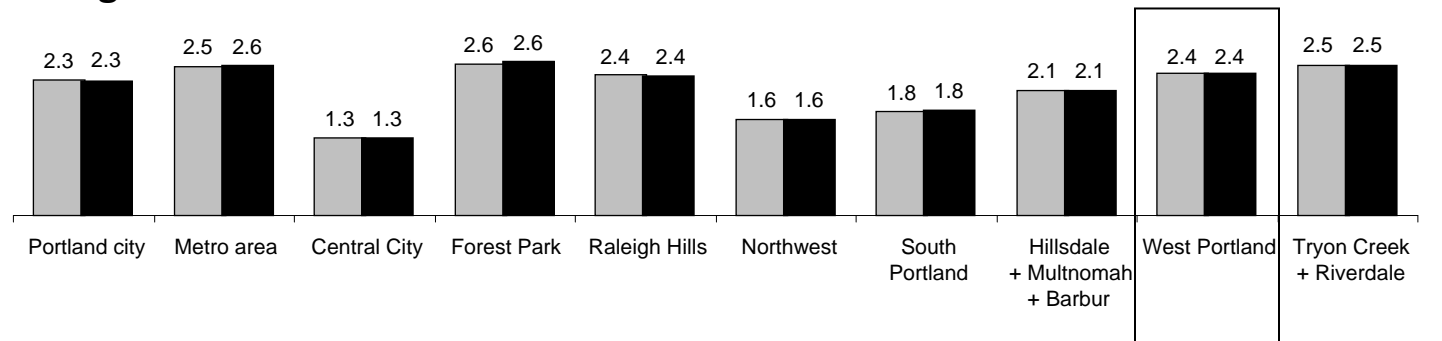
	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	2,226,000	585,000	30,931	8,424	15,446	21,794	8,560	19,601	10,836	9,668
2000	1,927,881	529,121	19,202	5,279	15,485	20,014	8,136	18,674	10,481	8,884
% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

2000 2010

Median Age

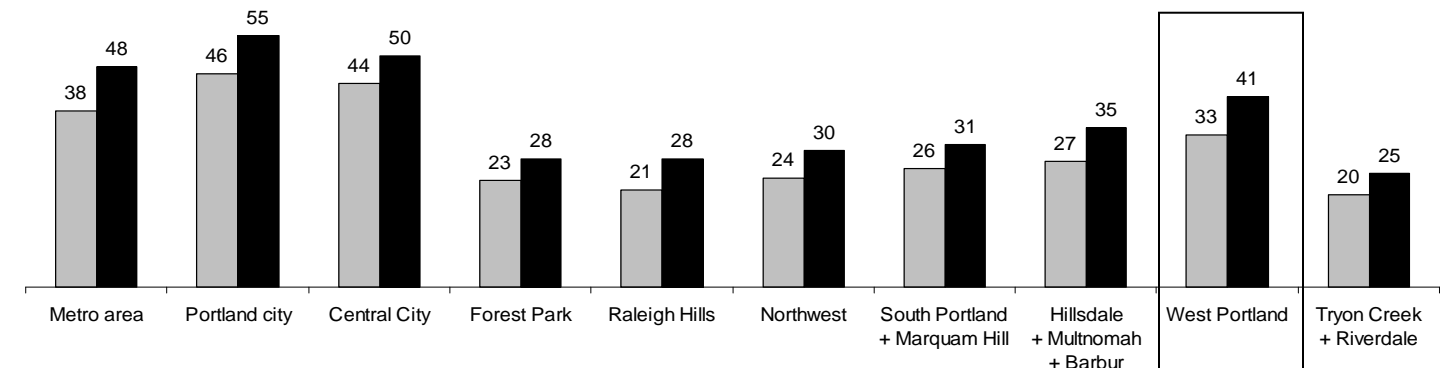


Average Household Size

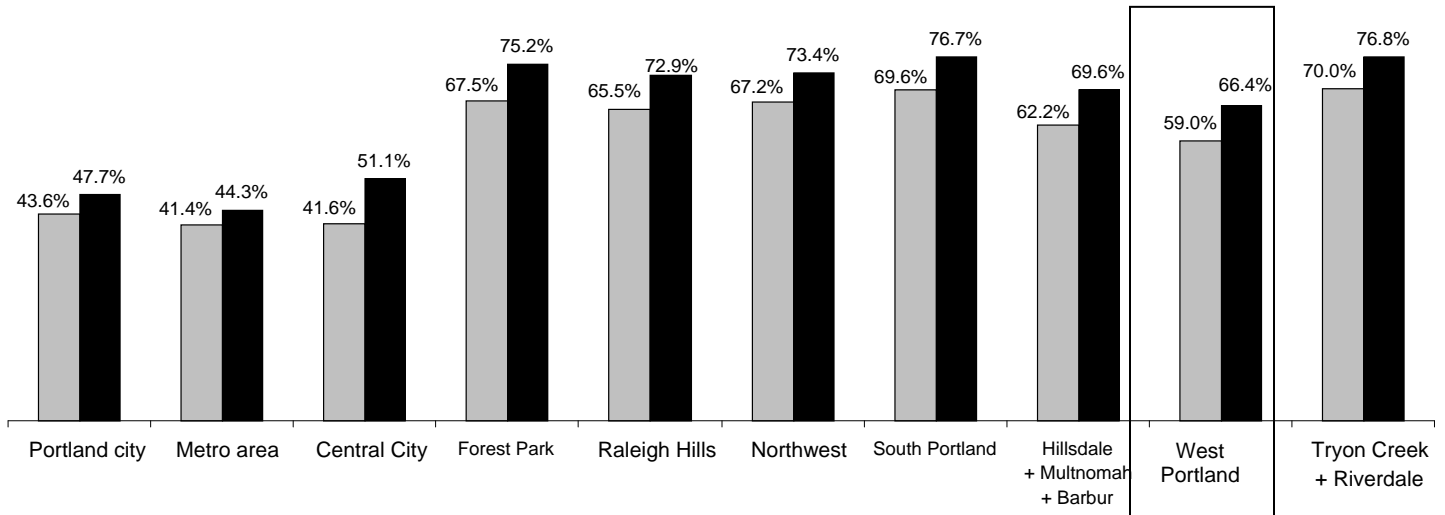


Diversity Index

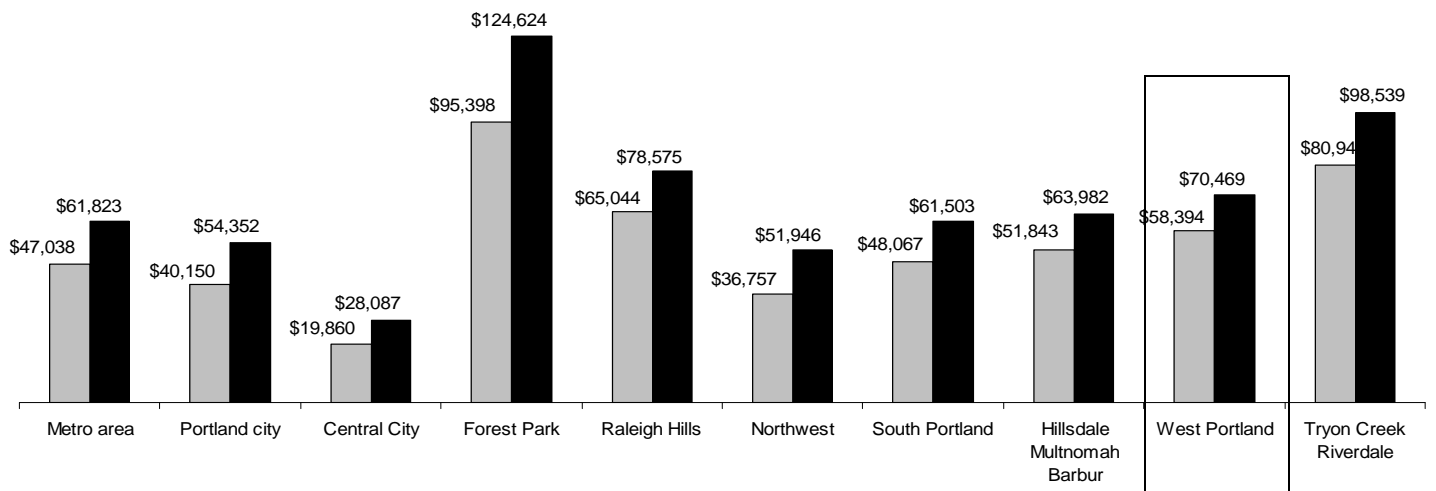
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



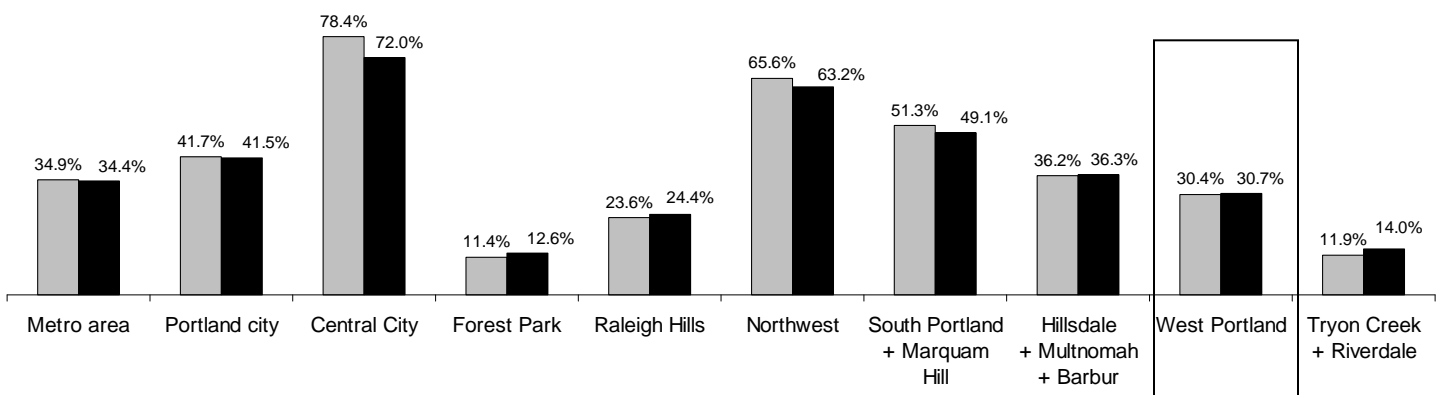
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



West Portland Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

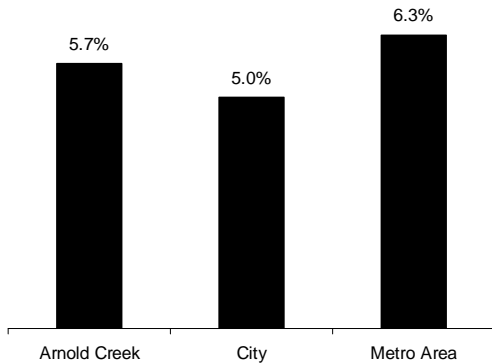
West Portland	City	Metro Area
139,578	51,937,895	107,875,146

OFFICE SPACE

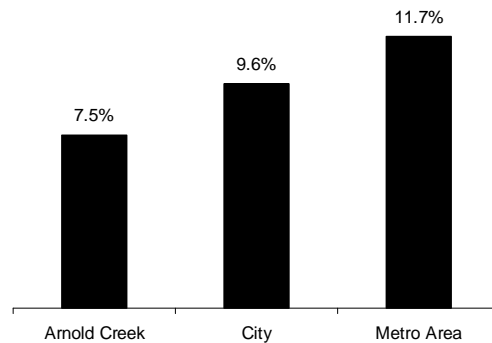
Square Feet

West Portland	City	Metro Area
433,333	54,348,765	92,465,455

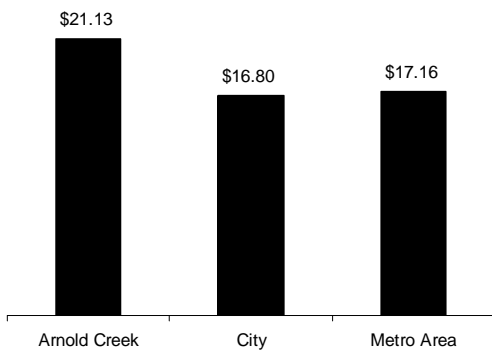
Retail Vacancy



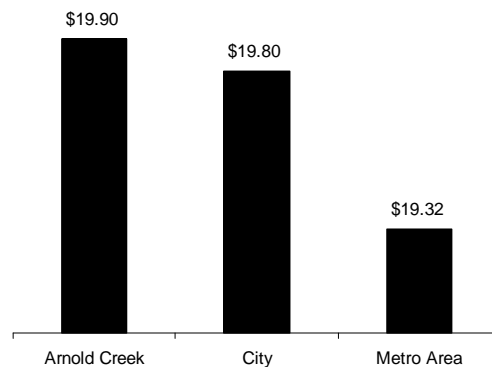
Office Vacancy



Retail Rents



Office Rents



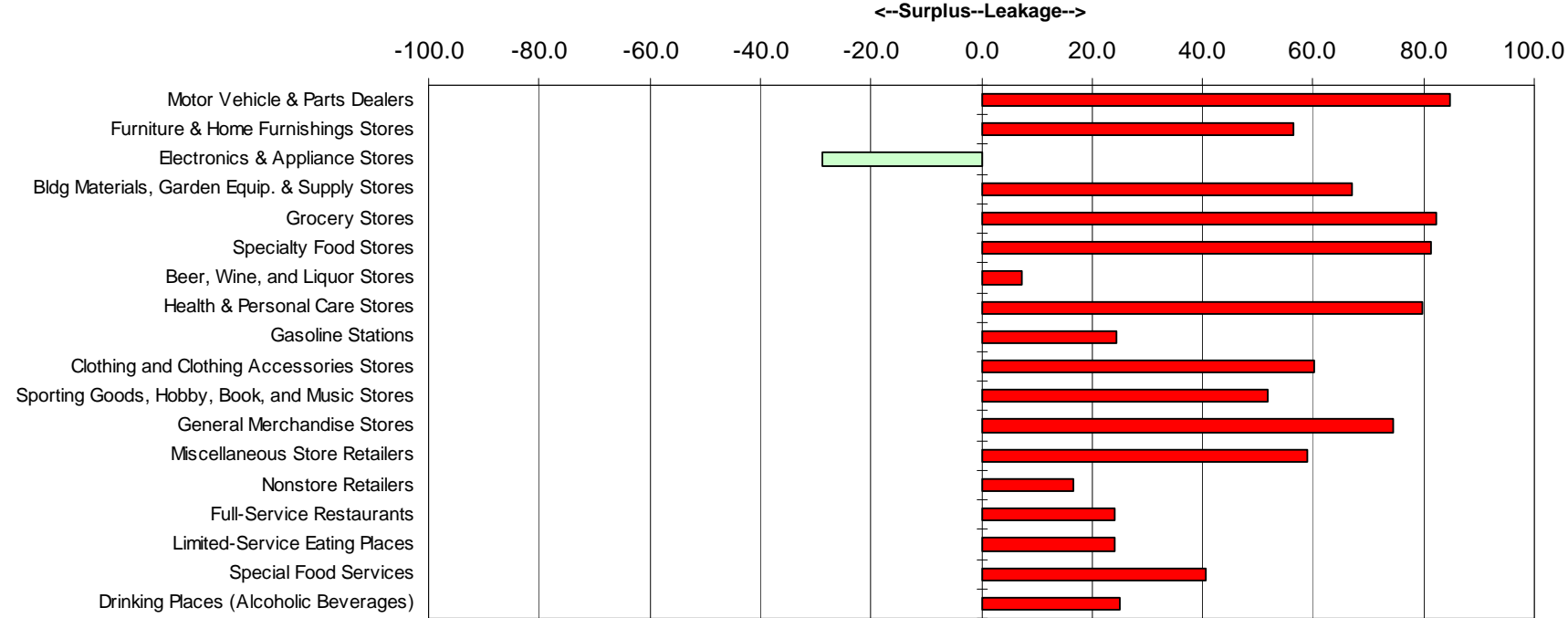
West Portland Analysis Area

Retail Market Profile

Retail Gap = \$106 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$156,753,122	\$50,287,067	\$106,466,055	51.4	93
Total Retail Trade (NAICS 44-45)	\$133,872,072	\$36,878,384	\$96,993,688	56.8	68
Total Food & Drink (NAICS 722)	\$22,881,050	\$13,408,683	\$9,472,367	26.1	25

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



West Portland Analysis Area

Employment

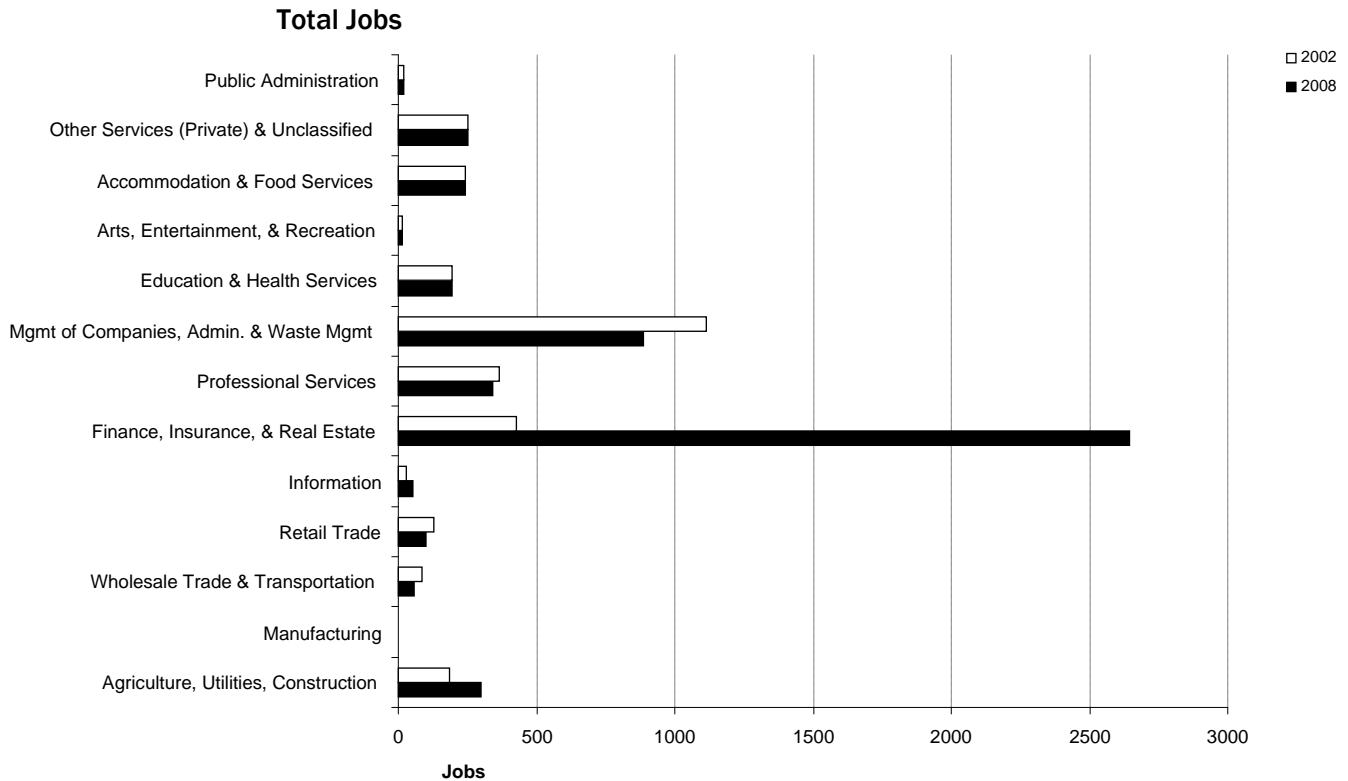
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

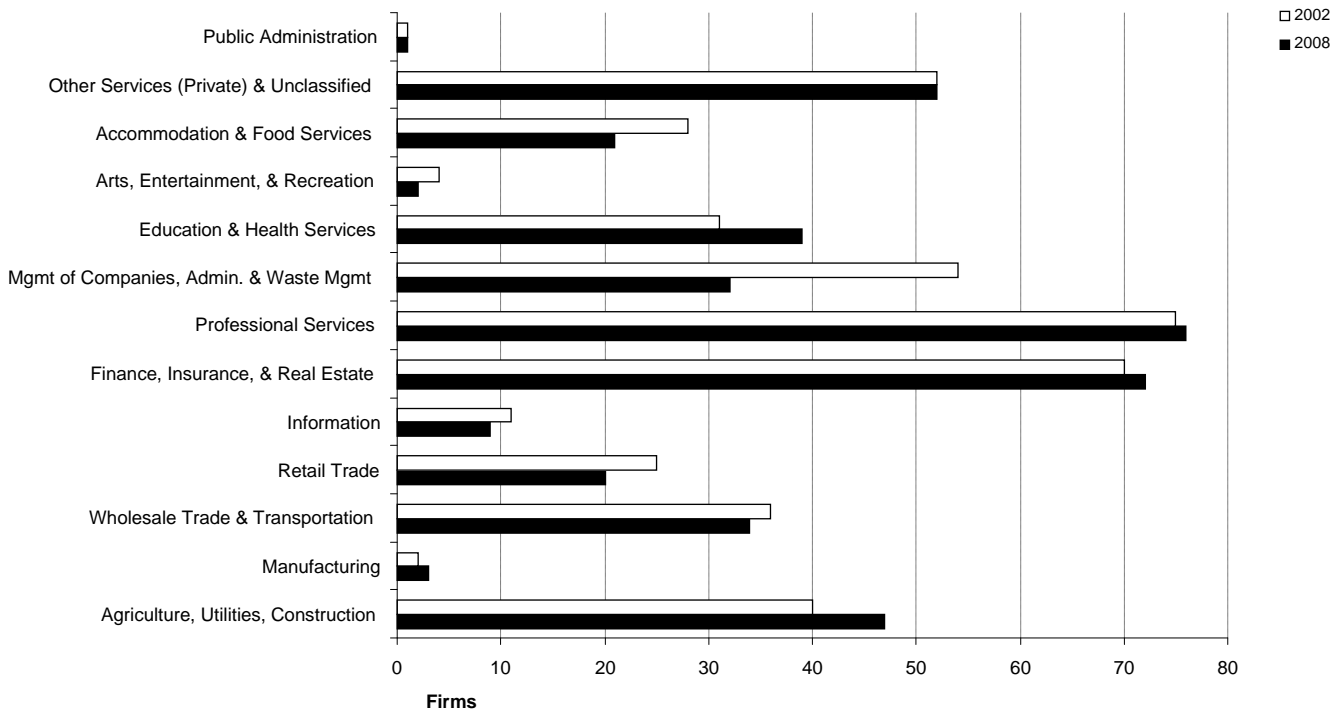
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

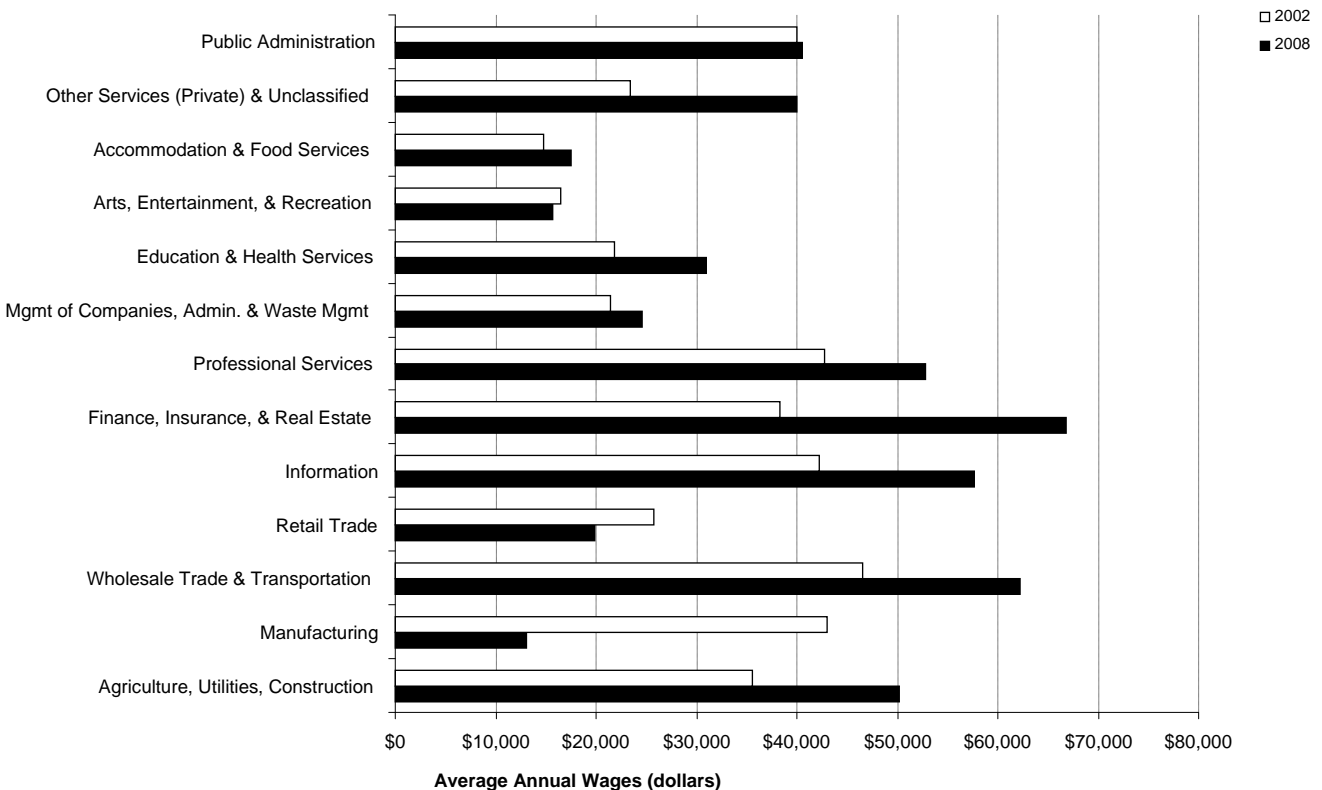
	2002	2008	change
Total Jobs	3,061	5,104	+2,043
Total Firms	429	408	- 21
Average Annual Wages	\$28,038	\$45,600	+17,562



Total Firms



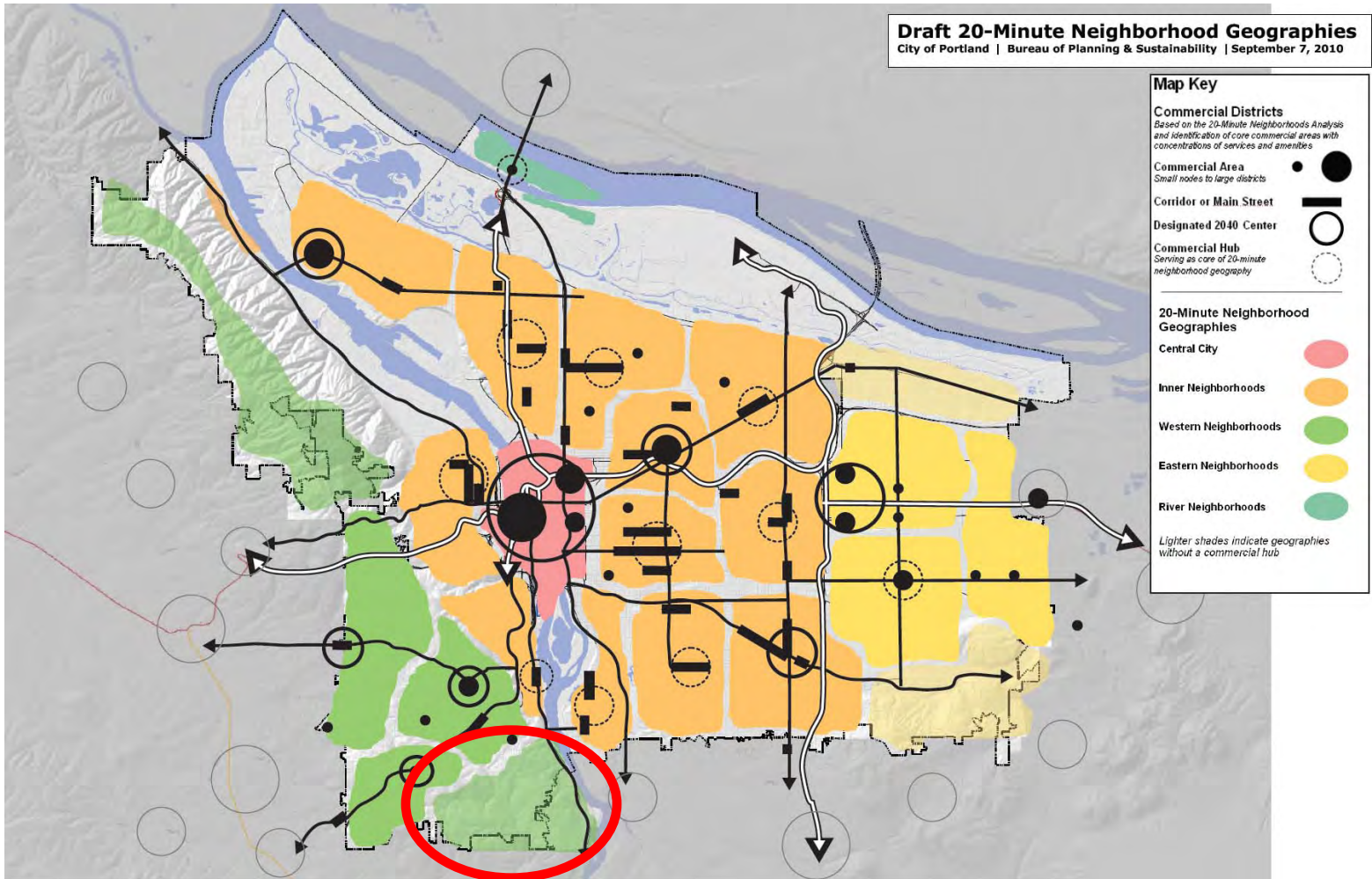
Average Annual Wages



Tryon Creek-Riverdale Analysis Area

Including Collins View, Marshall Park, Arnold Creek, and Dunthorpe neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

DRAFT May 20, 2011

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

Tryon Creek-Riverdale Analysis Area

Services and Amenities

<p>Population: 9,700 people (3,400 households) Land Area: 5.1 sq. miles (1,900 people per sq. mile)</p>
--

Commercial Districts

The area has almost no commercial services. Nearby commercial districts include downtown Lake Oswego (south of the analysis area), and a small clustering of commercial services at SW Terwilliger and Taylors Ferry (outside the northern edge of the analysis area).

Grocery stores: None

Community Amenities

Community Centers: None

Libraries: None

Parks and Open Spaces: 532 acres – including Tryon Creek State Park, Powers Marine Park, and the Maricara and Jensen natural areas.

Tree Canopy Coverage: 67%

Public Schools: 1 high school (Riverdale)

2 K-8 schools (Riverdale Grade School, Stephenson Elementary*)

**At edge of analysis area*

Colleges (campus): 1 (Lewis and Clark College)

Hospitals: None

Farmers Markets: None

Transit Centers/Stations: None

Walkable Access Score: 15 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

Proximity to Services and Amenities

Percentage of households:

Within 1/2 mile of a park: 16%

Within 1/2 mile of a public elementary school: 3%

Within 3 miles of a full-service community center: 68%

Within 1/2 mile of a full-service grocery store: 5%

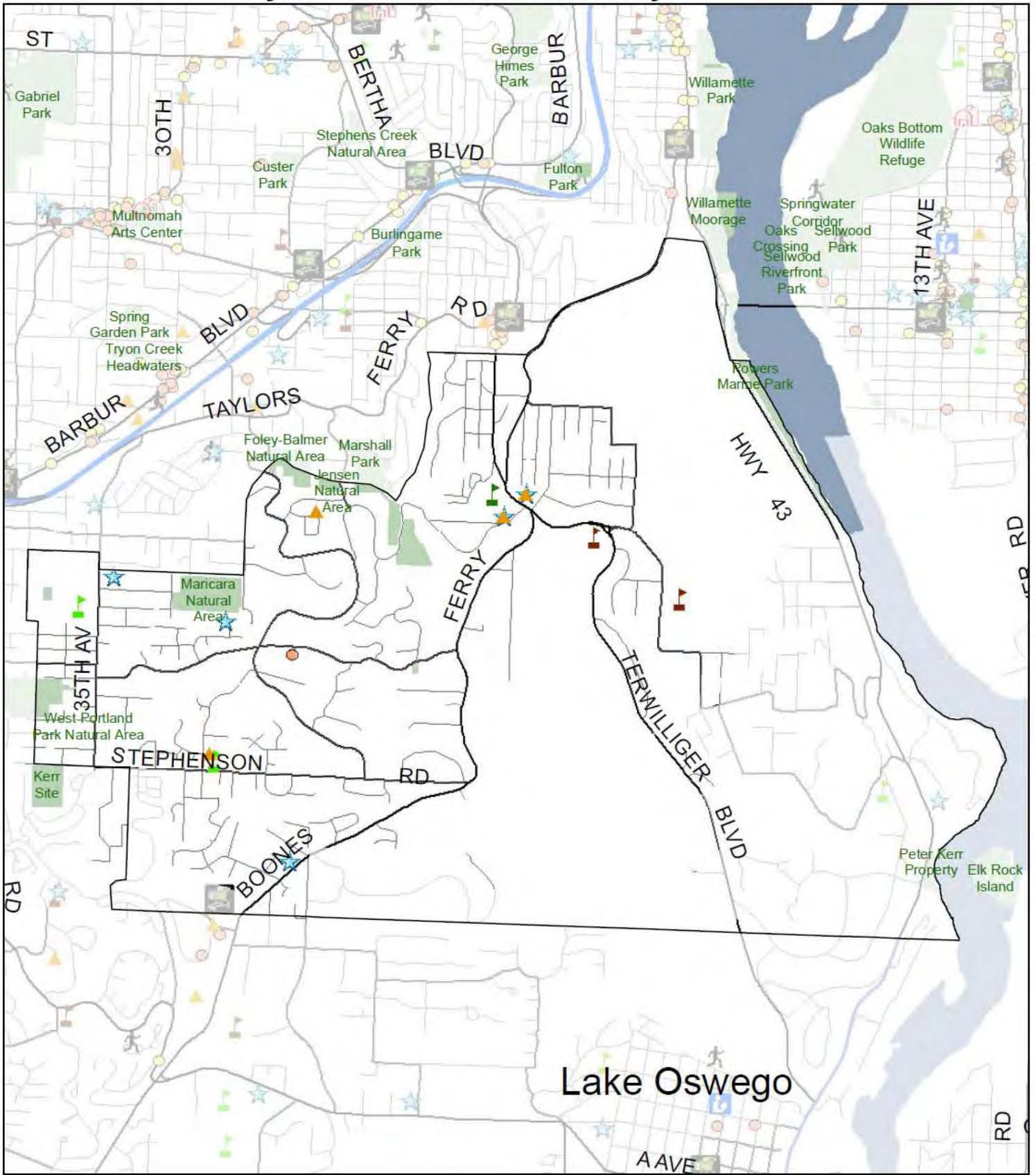
Within 1/4 mile of a frequent service transit stop: 0%

Neighborhood and Business Associations





Neighborhood Associations: Collins View, Marshall Park, Arnold Creek, and Dunthorpe

Business Associations: None

Tryon Creek-Riverdale Analysis Area



Services and Amenities

-  Type 1 Commercial
-  Type 2 Commercial
-  Fitness Centers
-  Grocery Stores
-  Places of Worship
-  Farmers Markets
-  Libraries
-  Community Centers
-  Public HS
-  Public K-8
-  Private Schools
-  Daycare Centers



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0 750 1,500 3,000
Feet

March 25, 2011

Tryon Creek-Riverdale Analysis Area



Transit Infrastructure

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-  MAX
-  Streetcar
-  Frequent Service
-  Standard Service
-  Rush-Hour Only Service



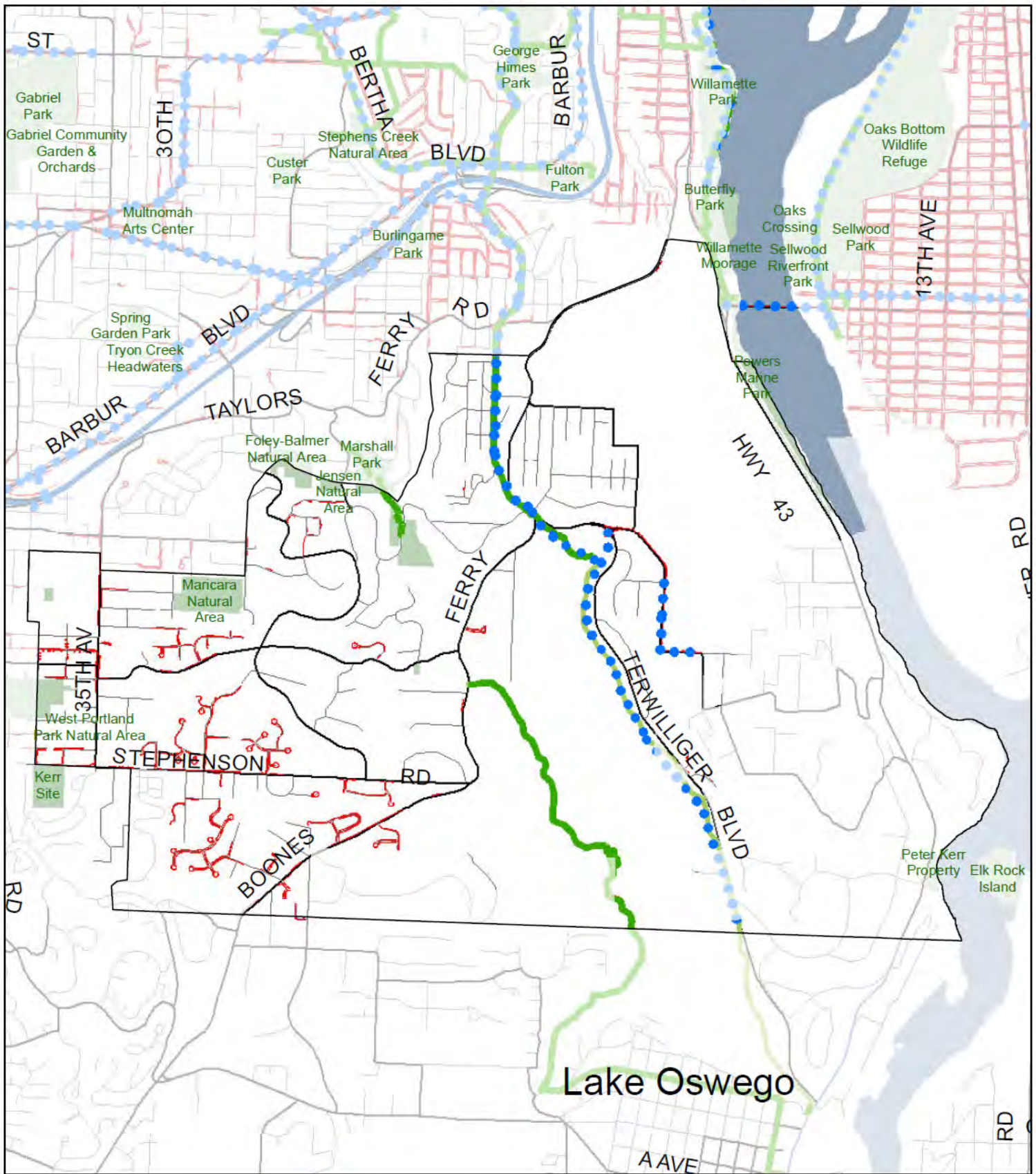
0 750 1,500 3,000 Feet



City of Portland Bureau of Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director

May 12, 2011

Tryon Creek-Riverdale Analysis Area



Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



City of Portland Bureau of Planning & Sustainability
Sam Adams, Mayor | Susan Anderson, Director

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March 25, 2011

Tryon Creek-Riverdale Analysis Area

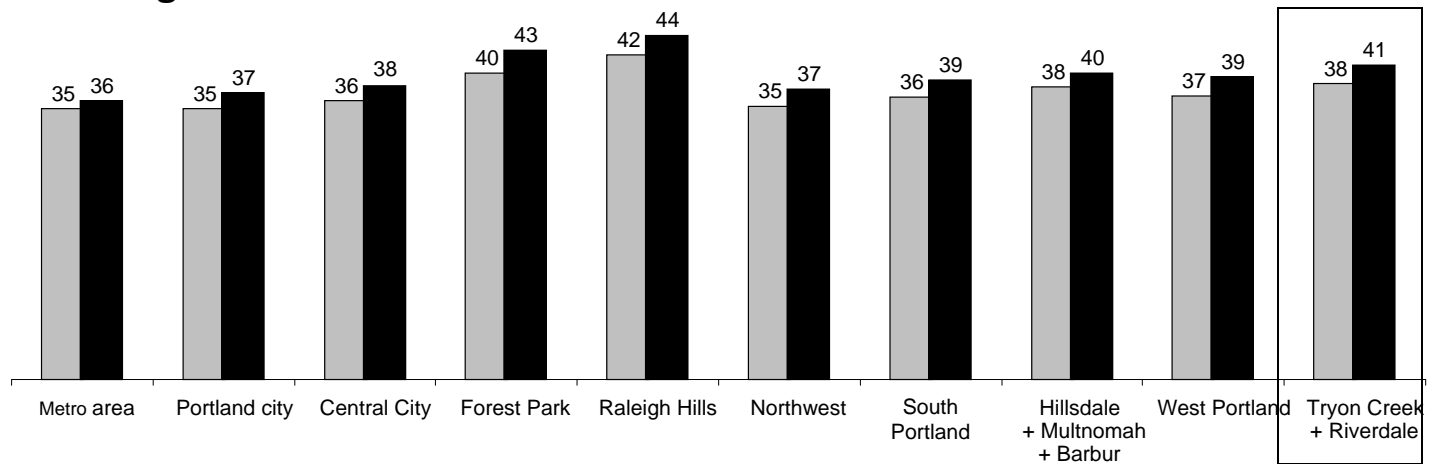
Demographics (2000 – 2010)

Population

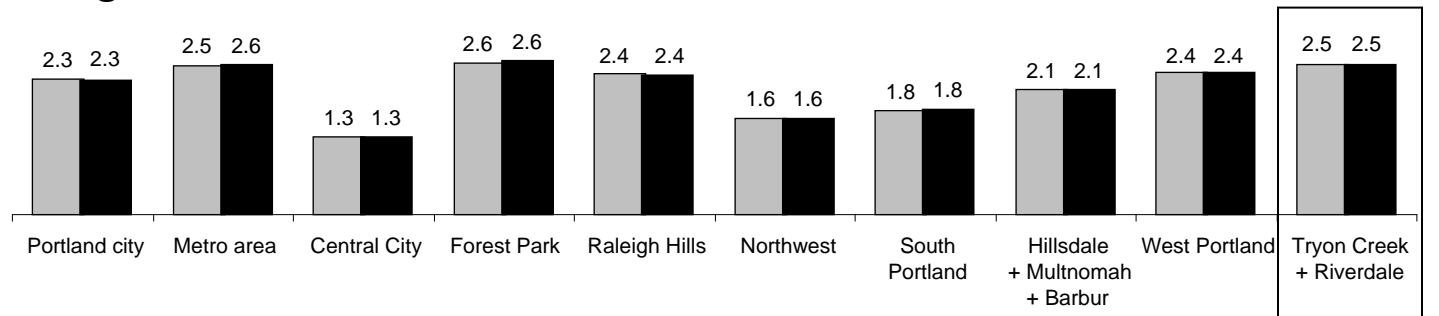
	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	2,226,000	585,000	30,931	8,424	15,446	21,794	8,560	19,601	10,836	9,668
2000	1,927,881	529,121	19,202	5,279	15,485	20,014	8,136	18,674	10,481	8,884
% change	12.9%	10.6%	61.1%	59.6%	-0.3%	8.9%	5.2%	5.0%	3.4%	

2000 2010

Median Age

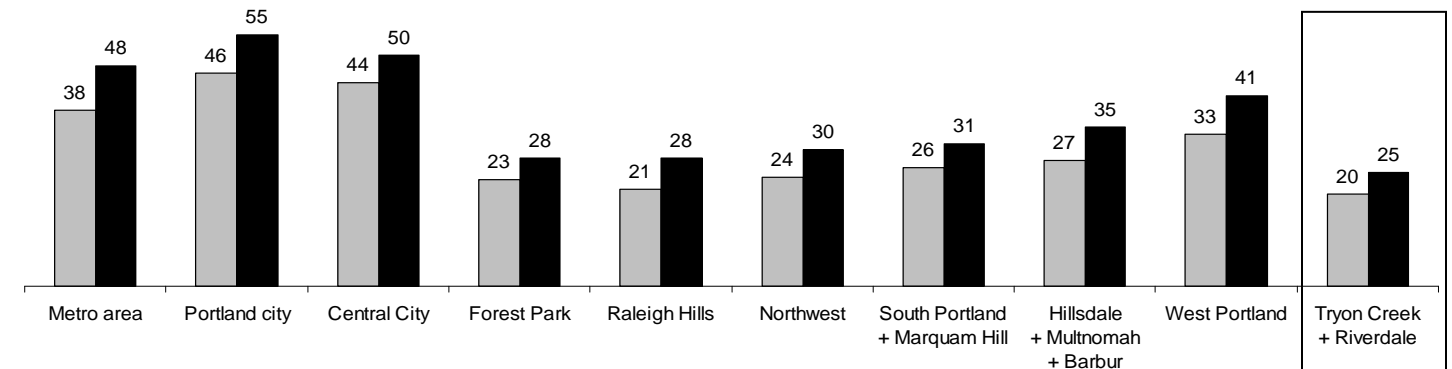


Average Household Size

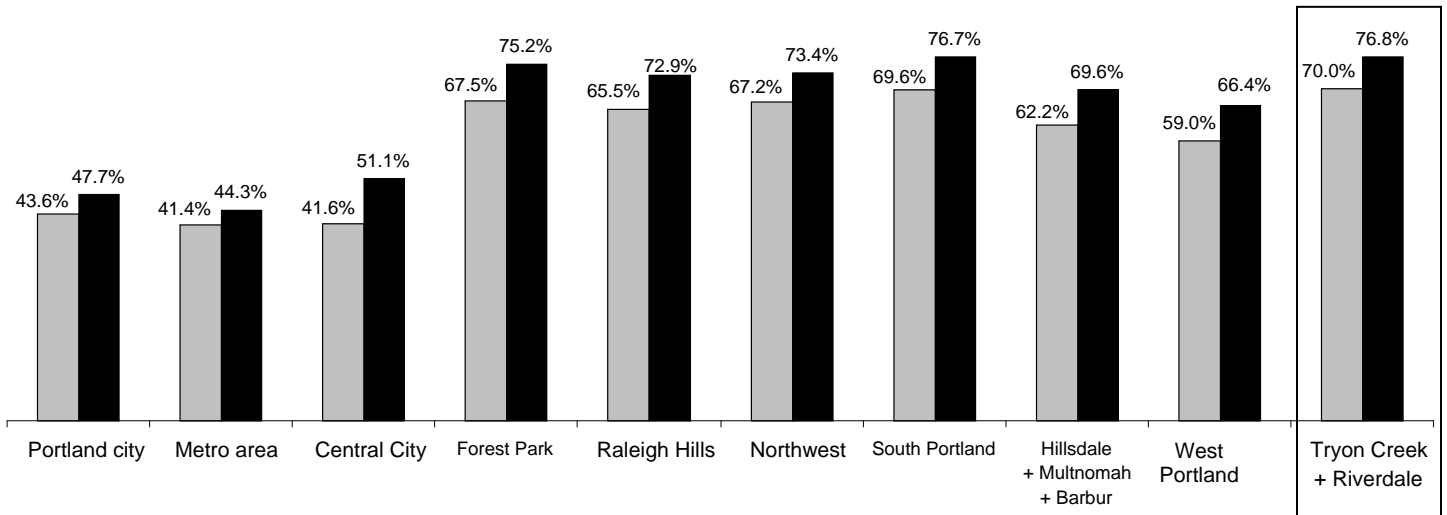


Diversity Index

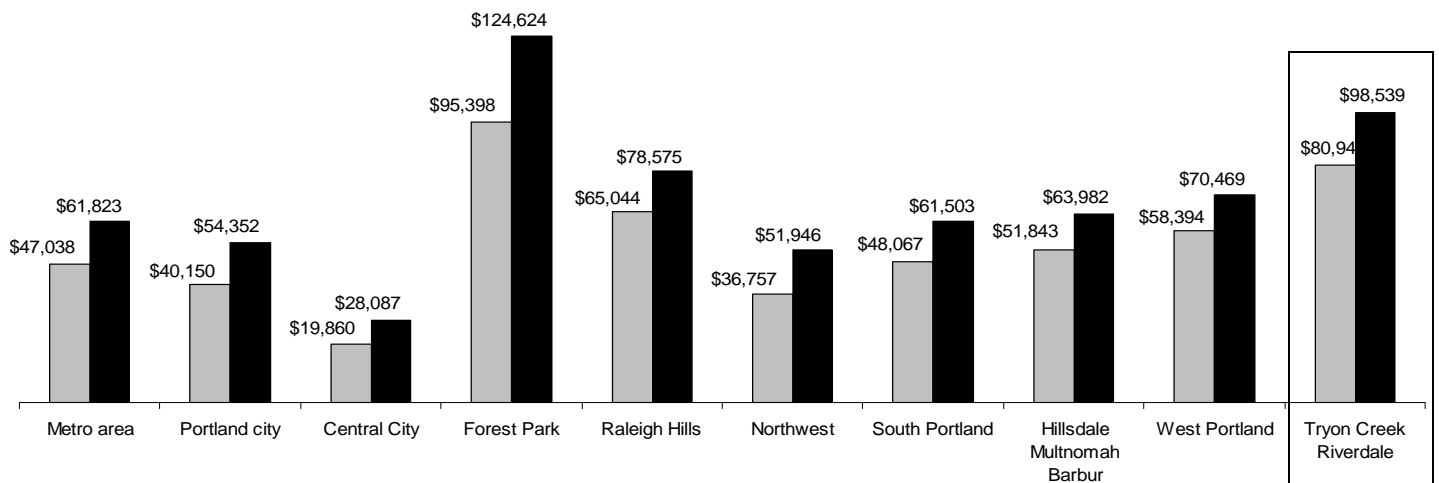
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Percent College Graduates



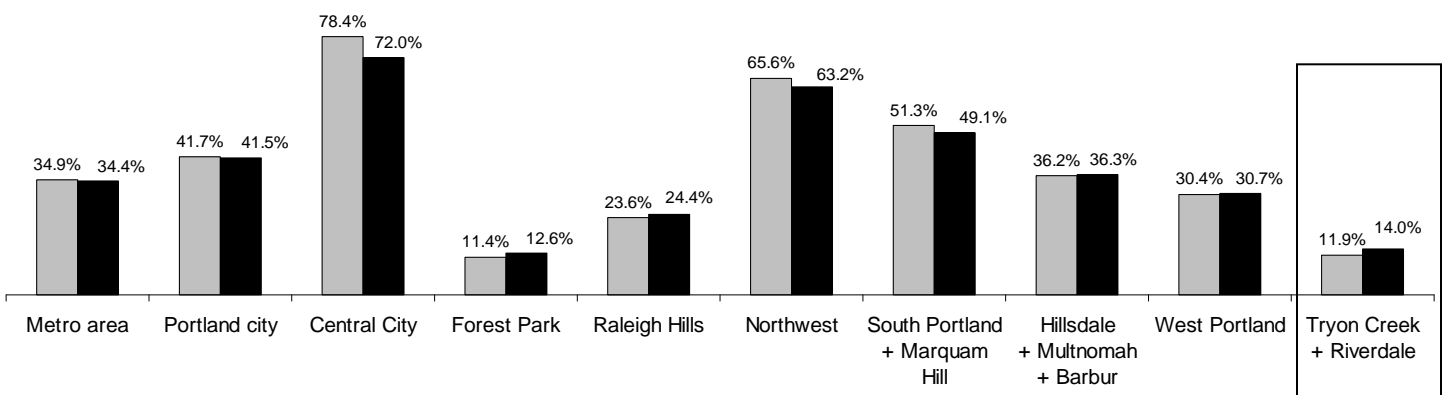
Median Household Income



Median Home Value

	Metro area	Portland city	Central City	Forest Park	Raleigh Hills	Northwest	South Portland	Hillsdale Multnomah Barbur	West Portland	Tryon Creek Riverdale
2010	273,500	253,184	400,314	655,858	392,082	636,032	\$429,056	\$342,618	319,207	440,625
2000	168,347	154,721	250,566	390,149	234,420	387,319	\$247,132	\$202,698	186,698	264,076
% change	62.5%	63.6%	59.8%	68.1%	67.3%	64.2%	73.6%	69.0%	71.0%	66.9%

Percent of Renters of Occupied Housing Units



Tryon Creek-Riverdale Analysis Area

Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010
 Source: COSTAR

RETAIL

Square Feet

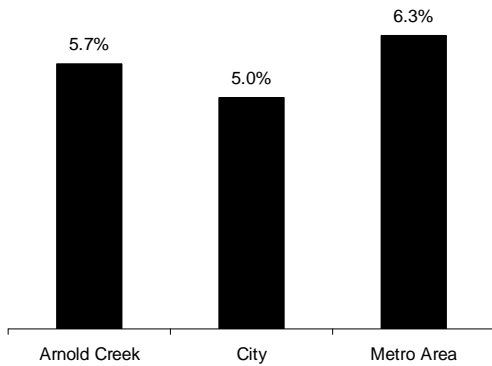
Tryon Creek	City	Metro Area
110,895	51,937,895	107,875,146

OFFICE SPACE

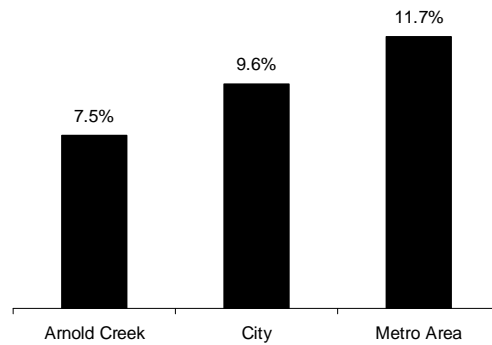
Square Feet

Tryon Creek	City	Metro Area
42,569	54,348,765	92,465,455

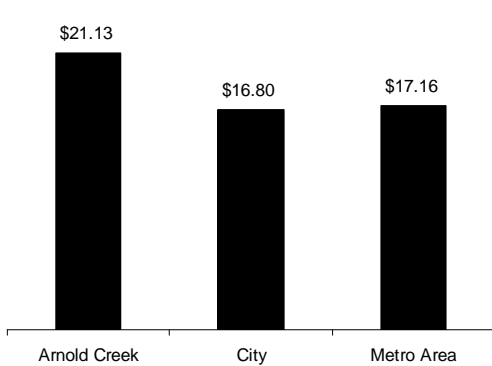
Retail Vacancy



Office Vacancy



Retail Rents



Office Rents



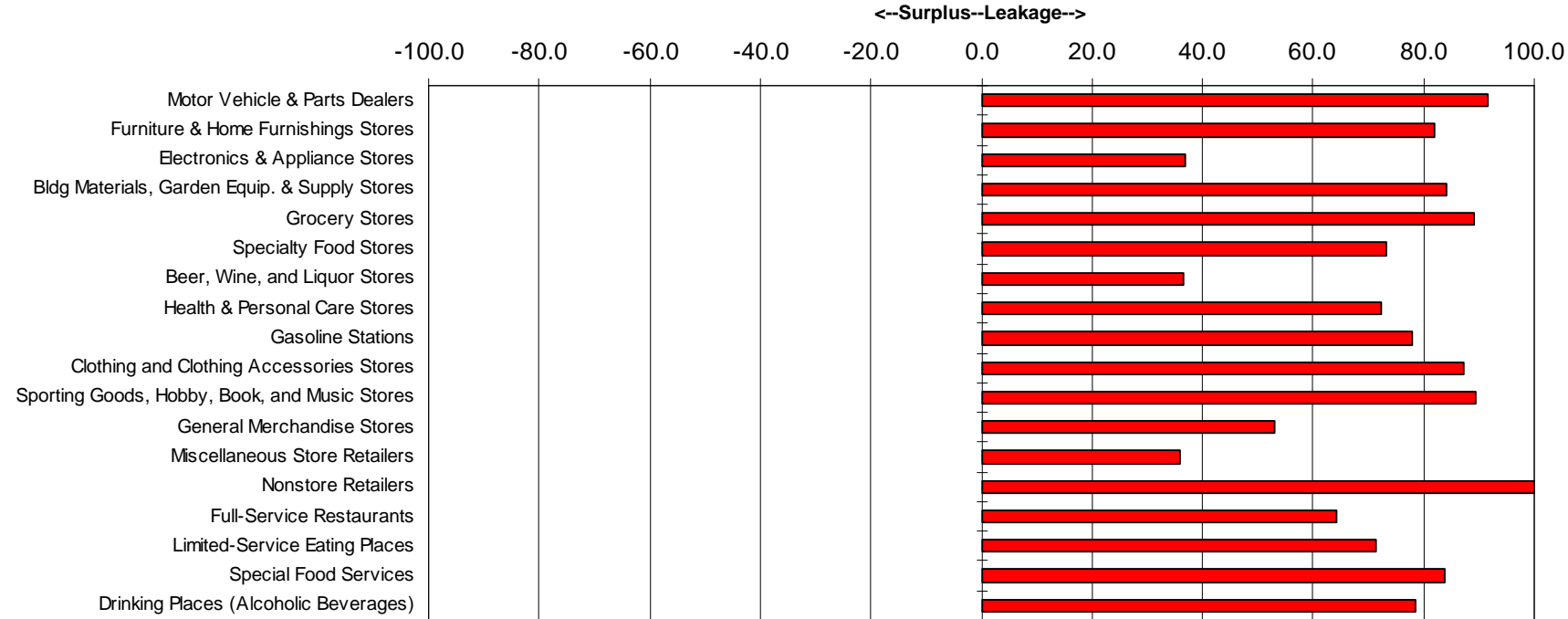
Tryon Creek-Riverdale Analysis Area

Retail Market Profile

Retail Gap = \$140 million

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$162,069,729	\$21,887,396	\$140,182,333	76.2	52
Total Retail Trade (NAICS 44-45)	\$138,653,804	\$17,938,651	\$120,715,153	77.1	43
Total Food & Drink (NAICS 722)	\$23,415,925	\$3,948,745	\$19,467,180	71.1	9

The "Retail Gap" is a difference between the potential spending in an area and the capacity of that area's retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) "leaks" to other areas, thus "leakage." Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or "surplus."



Tryon Creek-Riverdale Analysis Area

Employment

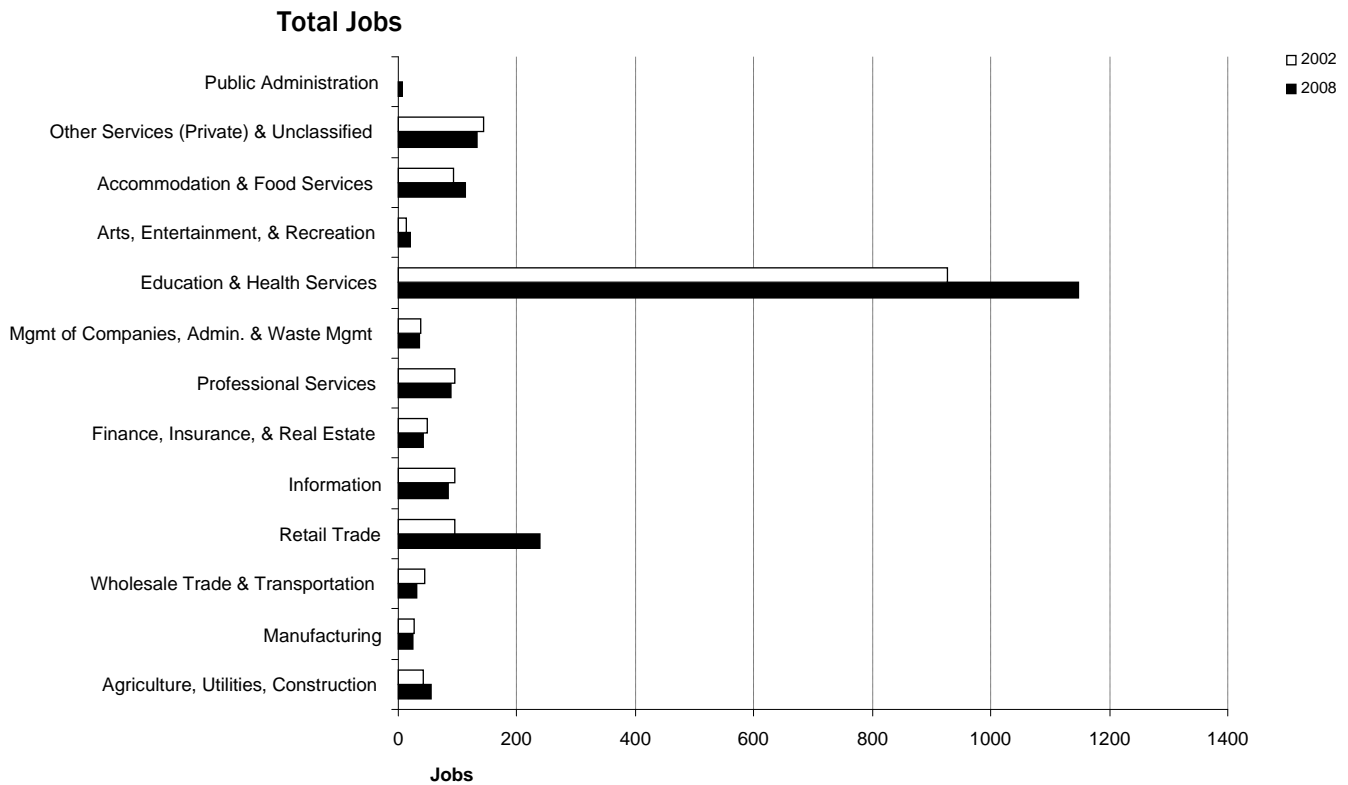
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

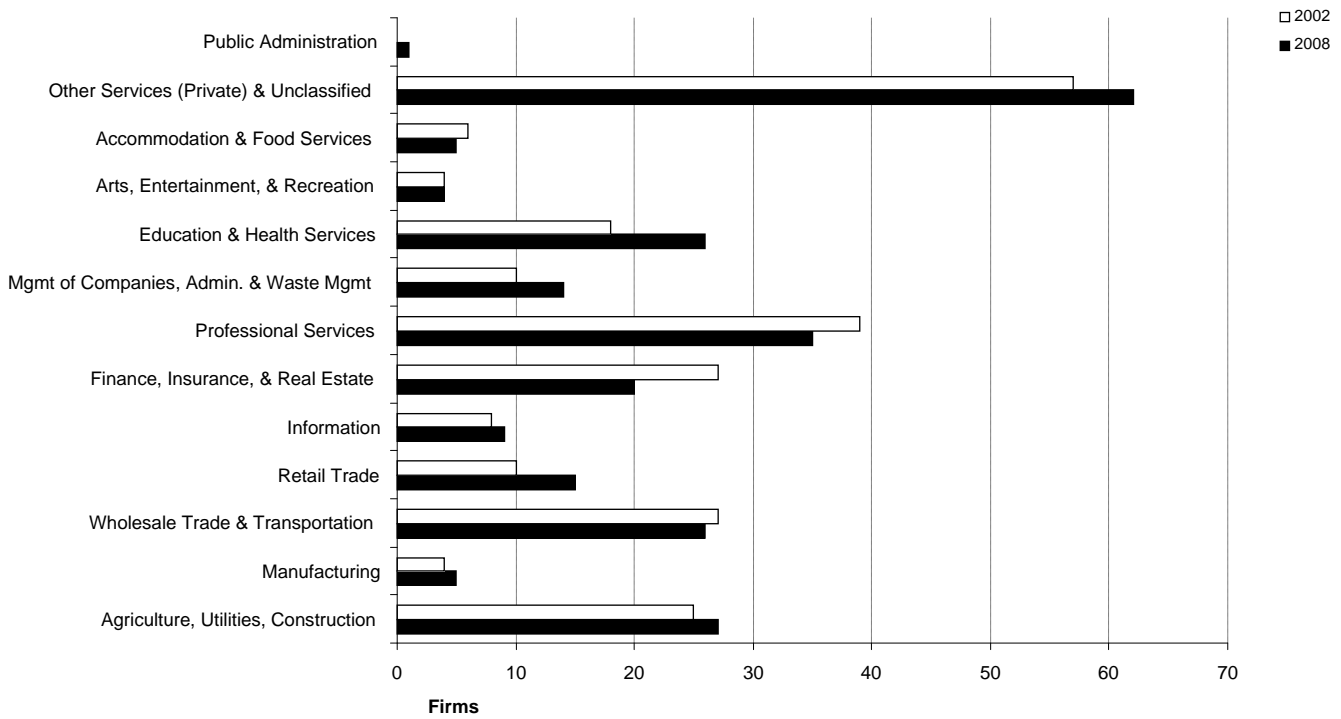
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	1,660	2,020	+360
Total Firms	235	249	+14
Average Annual Wages	\$35,002	\$41,365	+6,362



Total Firms



Average Annual Wages

