PORTLAND PLAN

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

PORTLAND PLAN BACKGROUND REPORT
JUNE 2012

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

Acknowledgments

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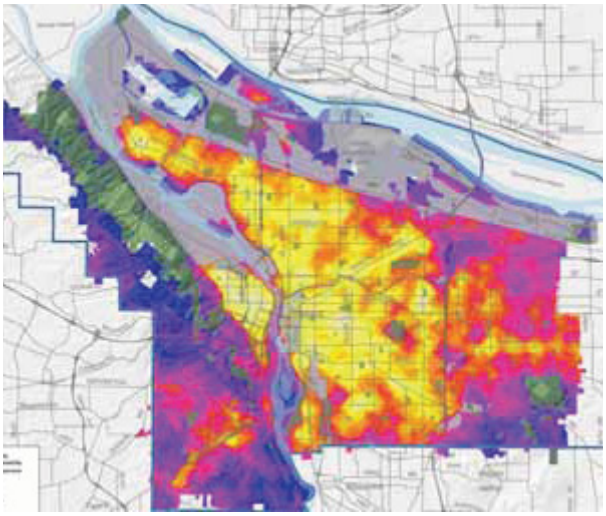
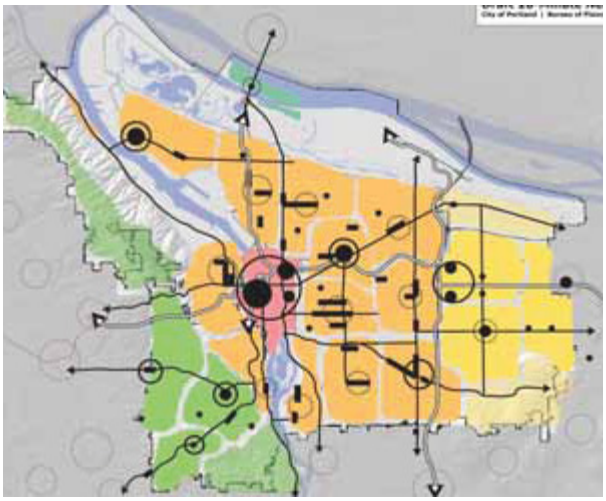
Overview



20-Minute Neighborhoods Analysis Map

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, community characteristics, 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.



Analysis Areas

As part of the Portland Plan and the Comprehensive Plan update, 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.

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 many 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).[4]

Other 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.

The analysis did not asses industrial areas (shown in grey on analysis map), as the focus of the analysis was on residential access to services.

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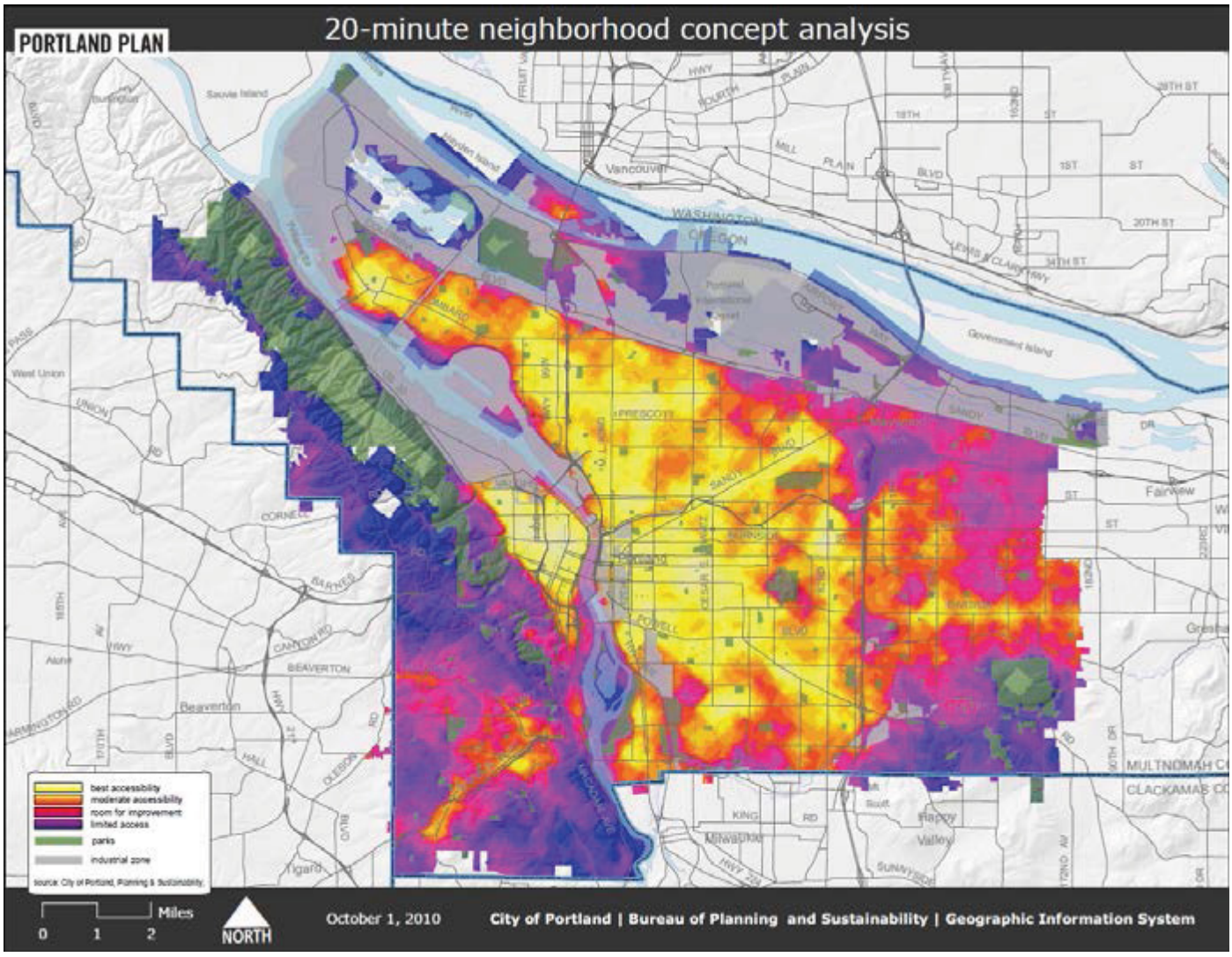
[2] *Ibid*

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

[4] Note that the inclusion of specific types of commercial services in this analysis is not intended to indicate that they are utilized by all populations or cultural groups. The primary intent of this analysis was to identify, at a general level, the local availability and clustering of commercial services. The commercial and community services needs of specific areas vary by community and culture and will need to be the focus of area-specific studies.

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

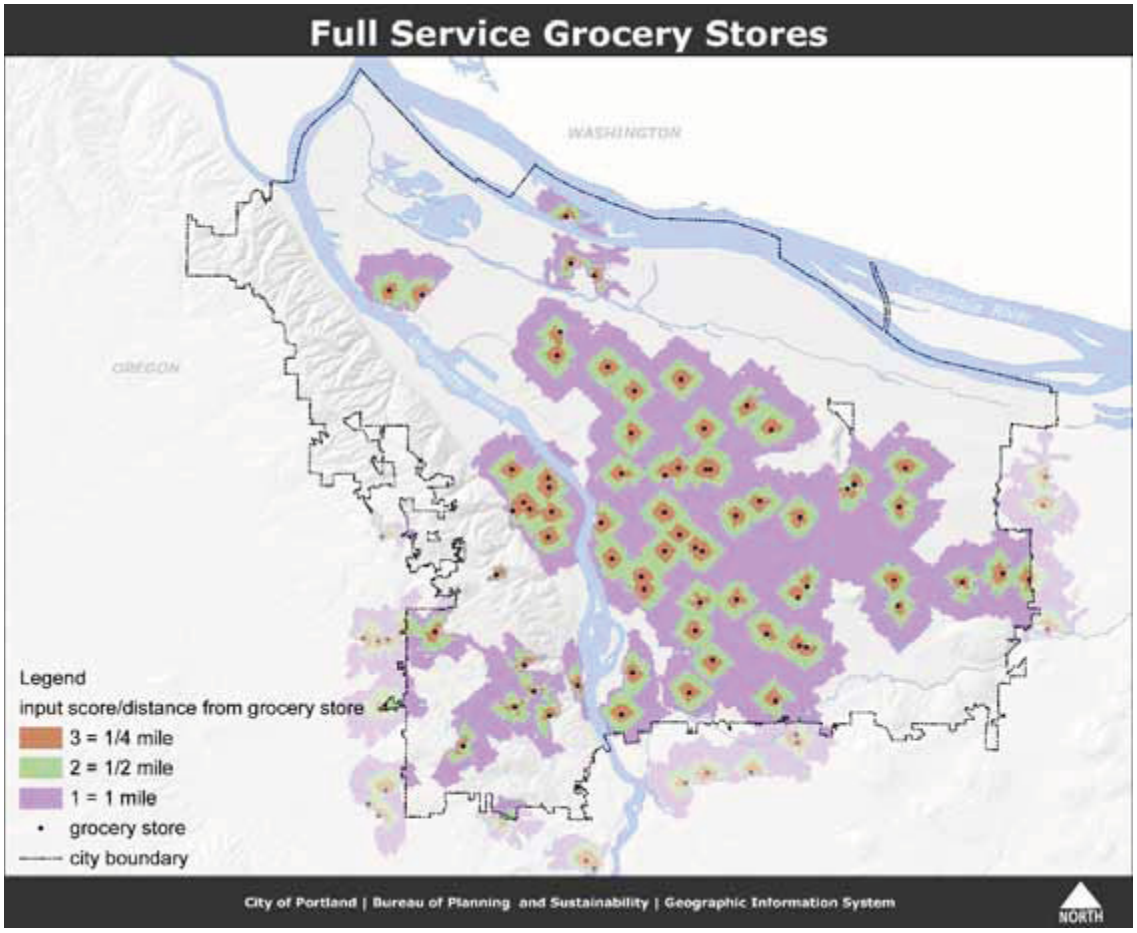
The concentration/density of elements (clusters of type 2 commercial, street intersections, sidewalk coverage) was measured using a 2640' x 2640' (quarter-mile square) grid cell by summing the number of occurrences per cell.

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



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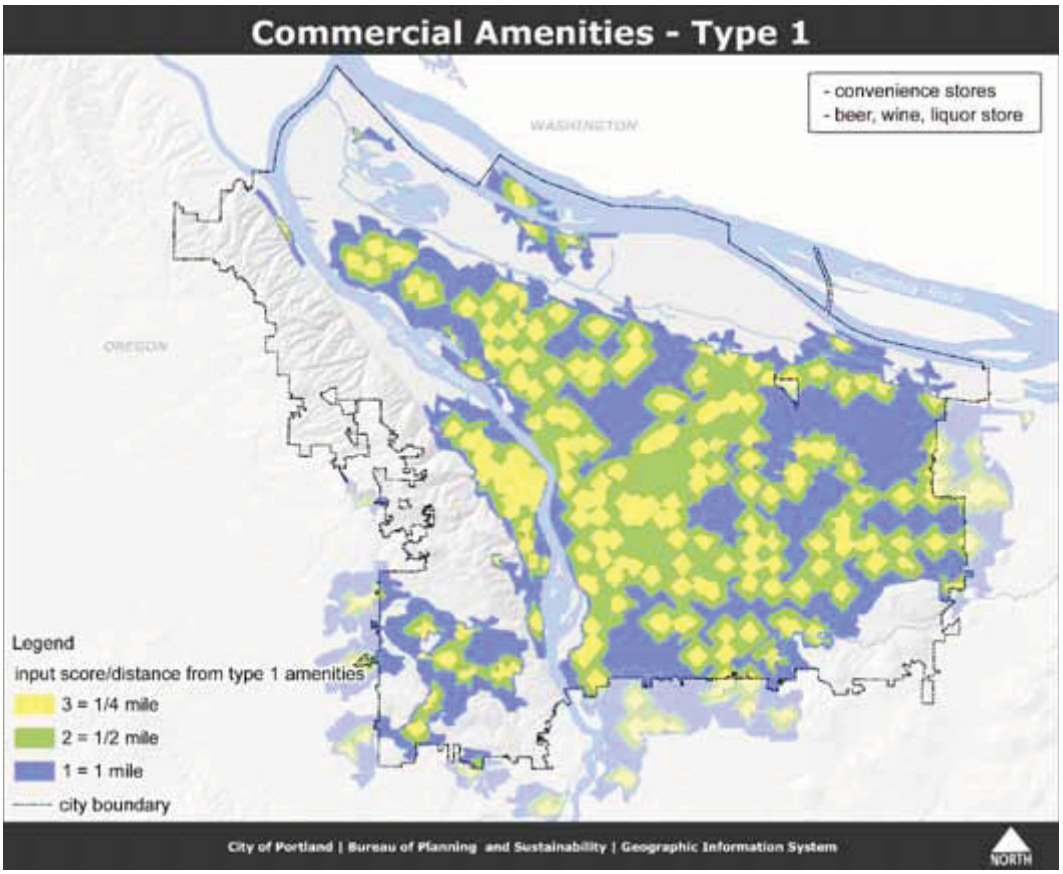

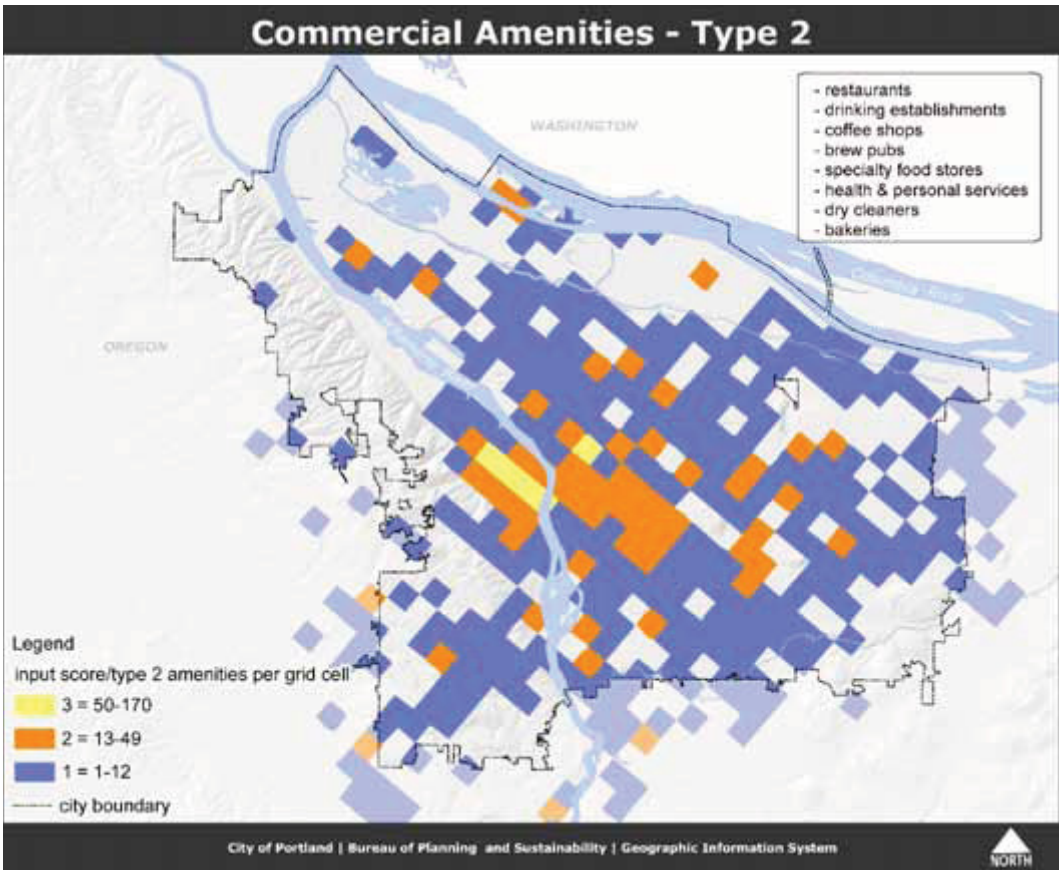

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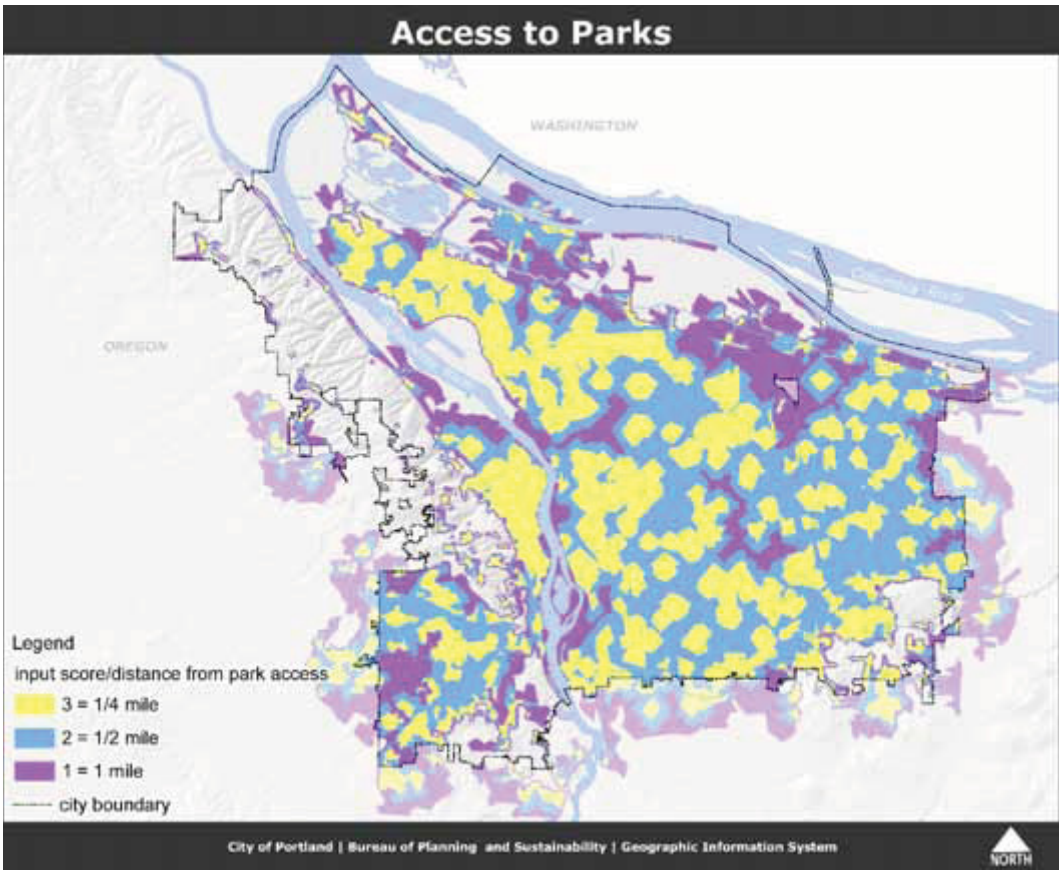

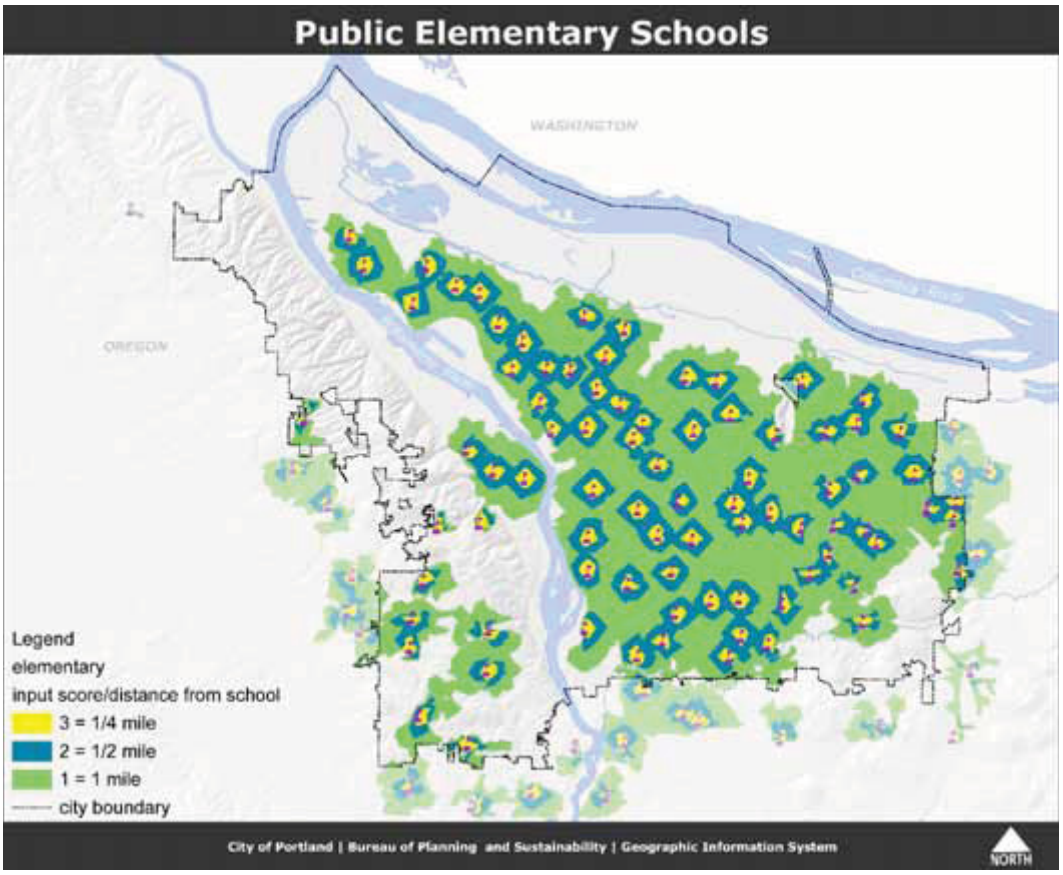

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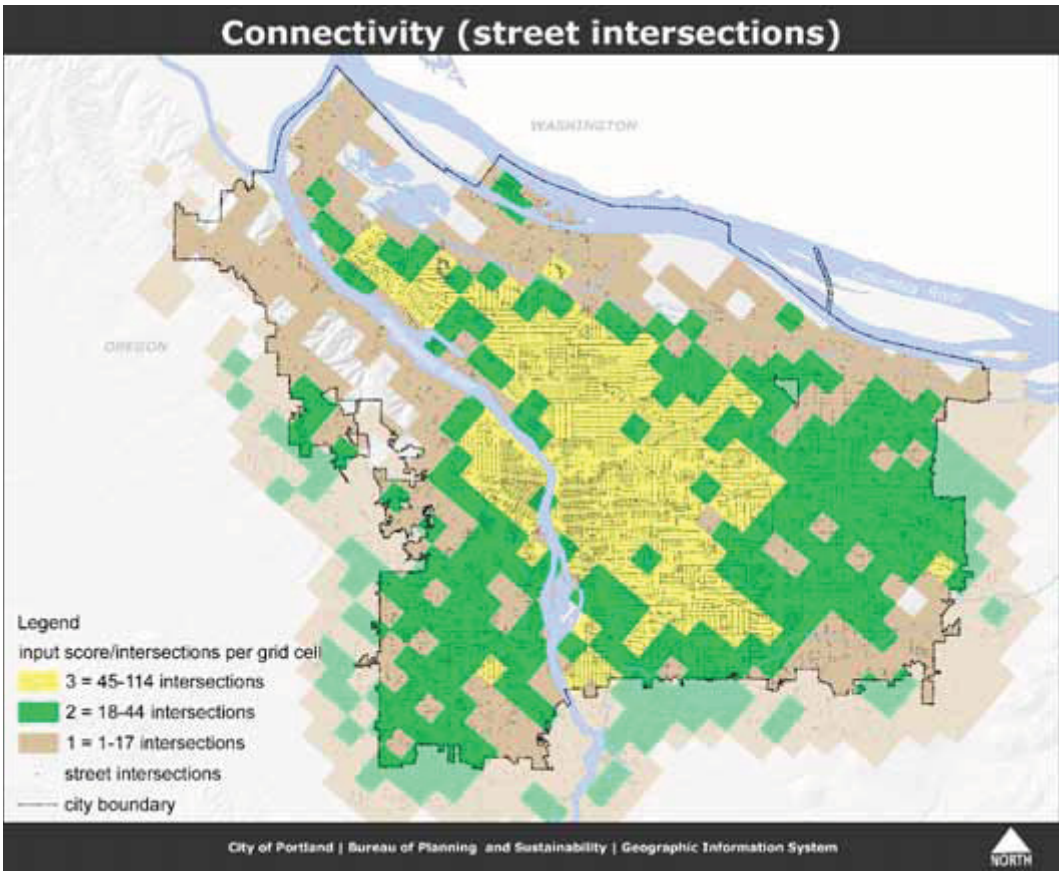
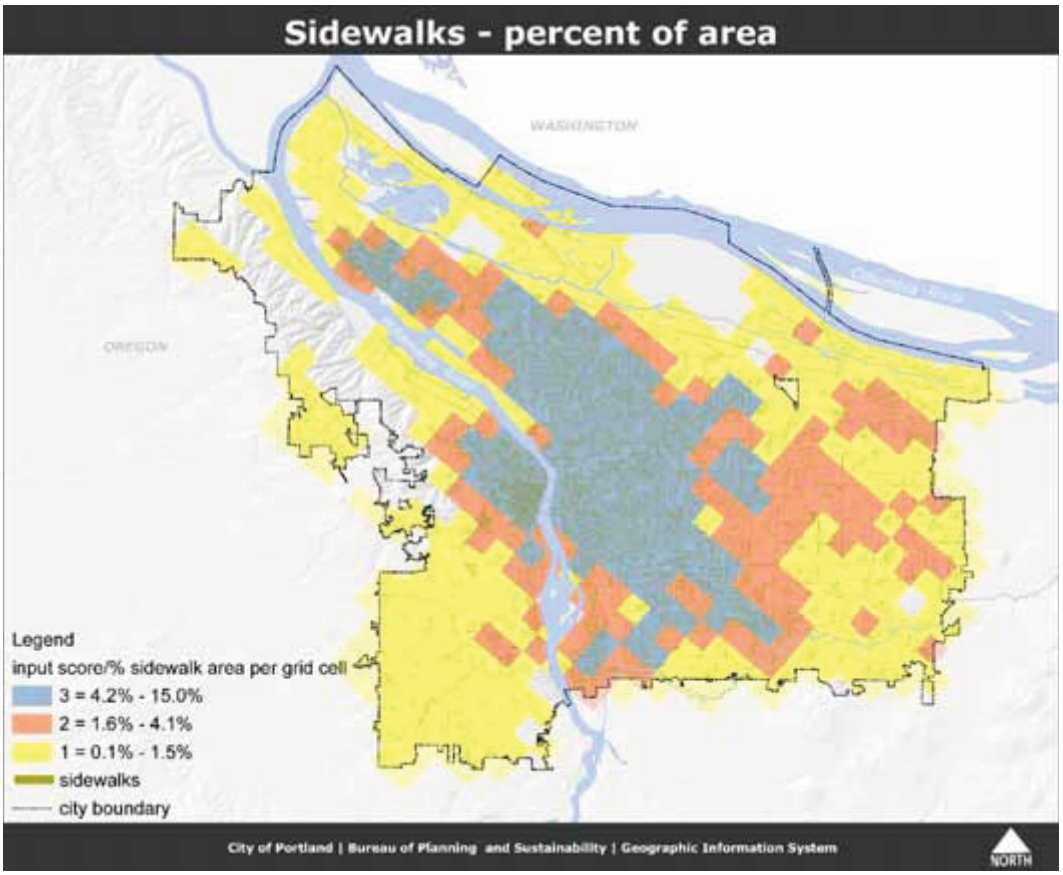
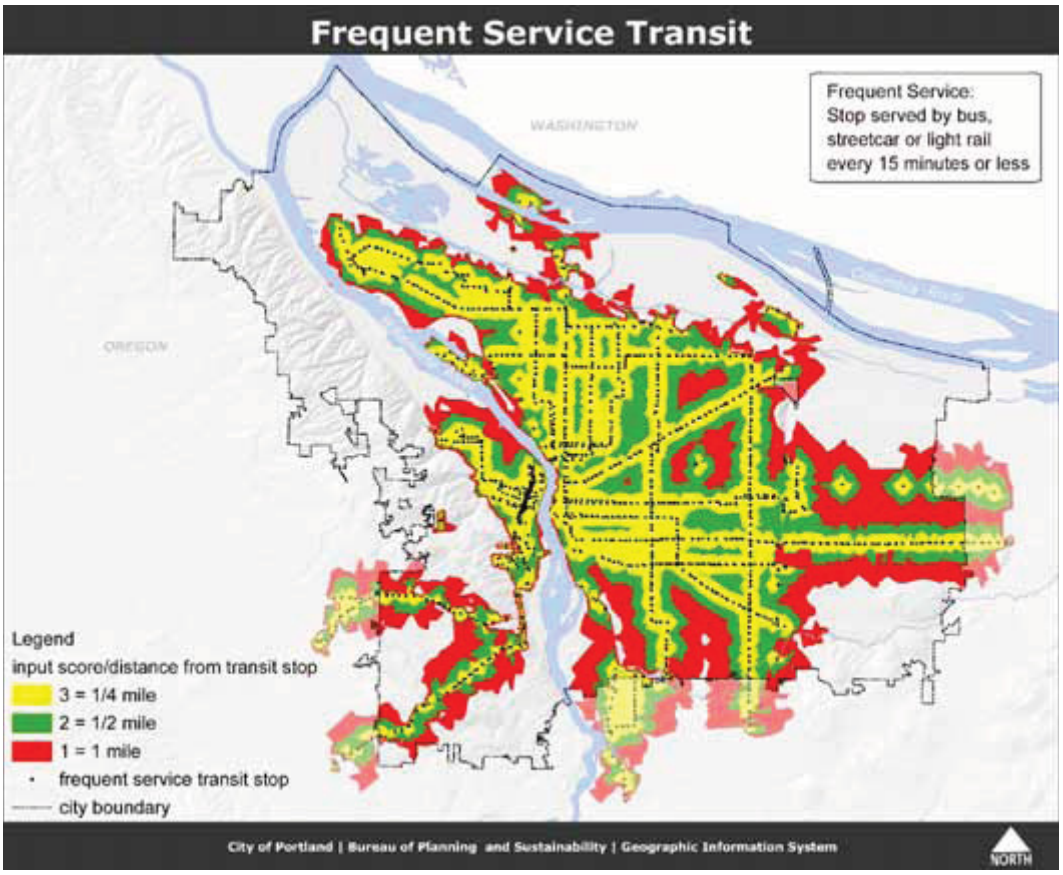
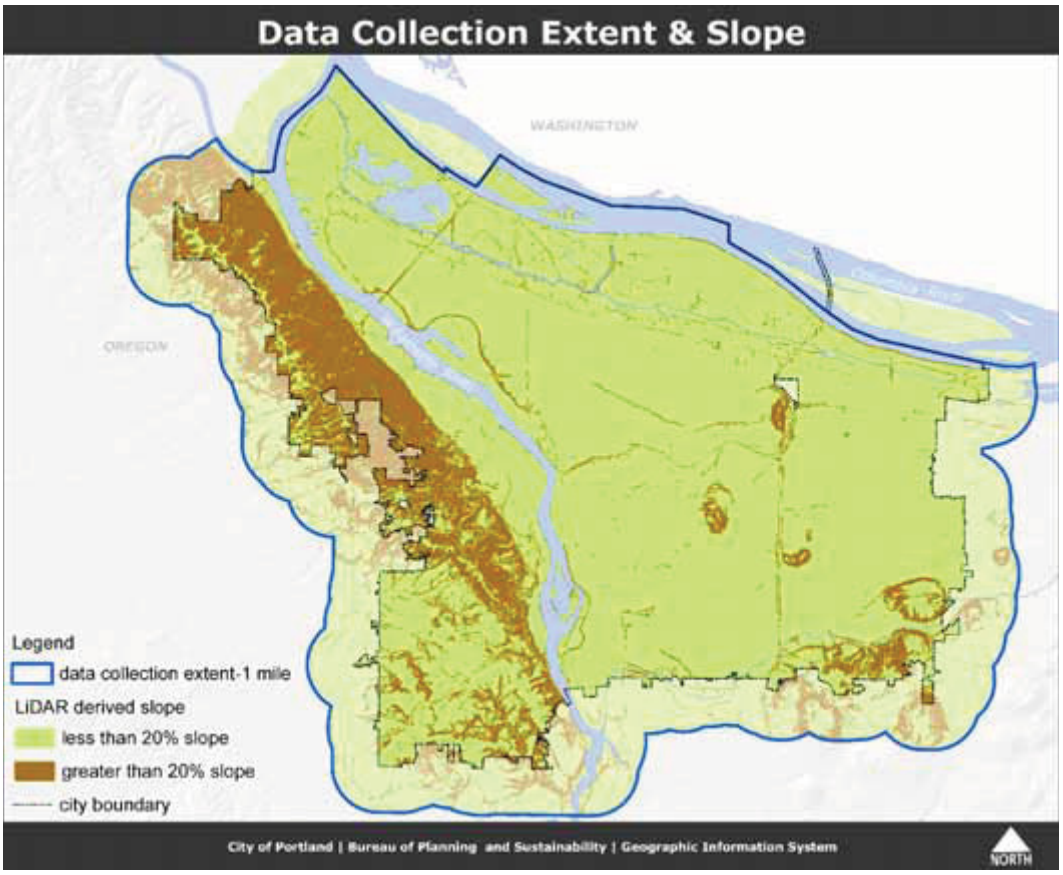




Input Mapping *(continued)*





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 has 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):

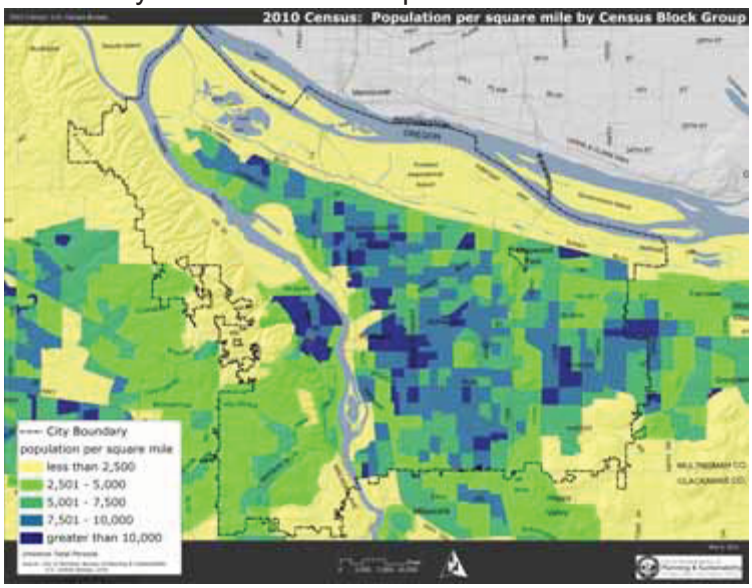
- What are options for sidewalk improvements and providing additional connections so that accessibility is improved?
- To what extent can bicycle and transit access expand the market area for neighborhood services, without increasing densities within walking distance?
- Can transit access to services 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?

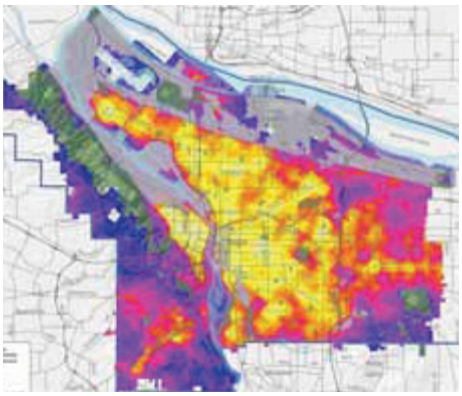
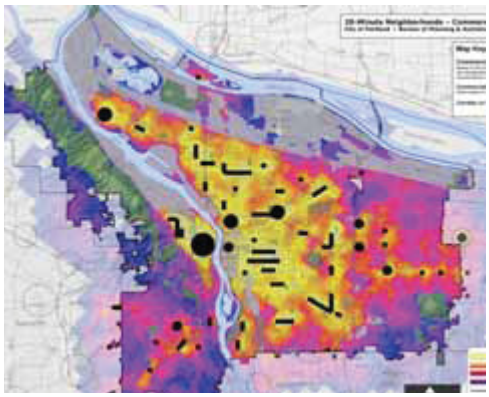
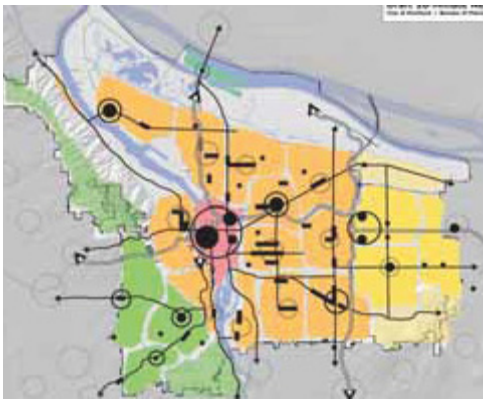
Density:

- 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 an 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 **Appendix A** 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, transit infrastructure and natural features in each area. The summaries also include information on demographics, anticipated growth, 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 three 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, and Pleasant Valley). 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 or centers 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
- Urban form characteristics
- Mixed-use areas
- Zoning
- Anticipated growth by 2035

2. Maps

- Comprehensive Plan designations (zoning)
- Services and amenities (besides most items listed above, also identifies locations of community gardens, places of worship, county health clinics and aging services, preschools and daycare centers)
- Transit infrastructure (including existing and planned light rail lines)
- Sidewalks and bicycle infrastructure
- Watersheds, natural features and stormwater systems

3. Demographics (2000 – 2010)

(Charts include comparative information for each analysis areas, Portland as a whole, and the metro area)

- Population
- Median age
- Age distribution
- Average household size
- Percent of households with children
- Diversity
- Race and ethnic distribution
- Median household income
- Percent below poverty
- Percent college graduates
- 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

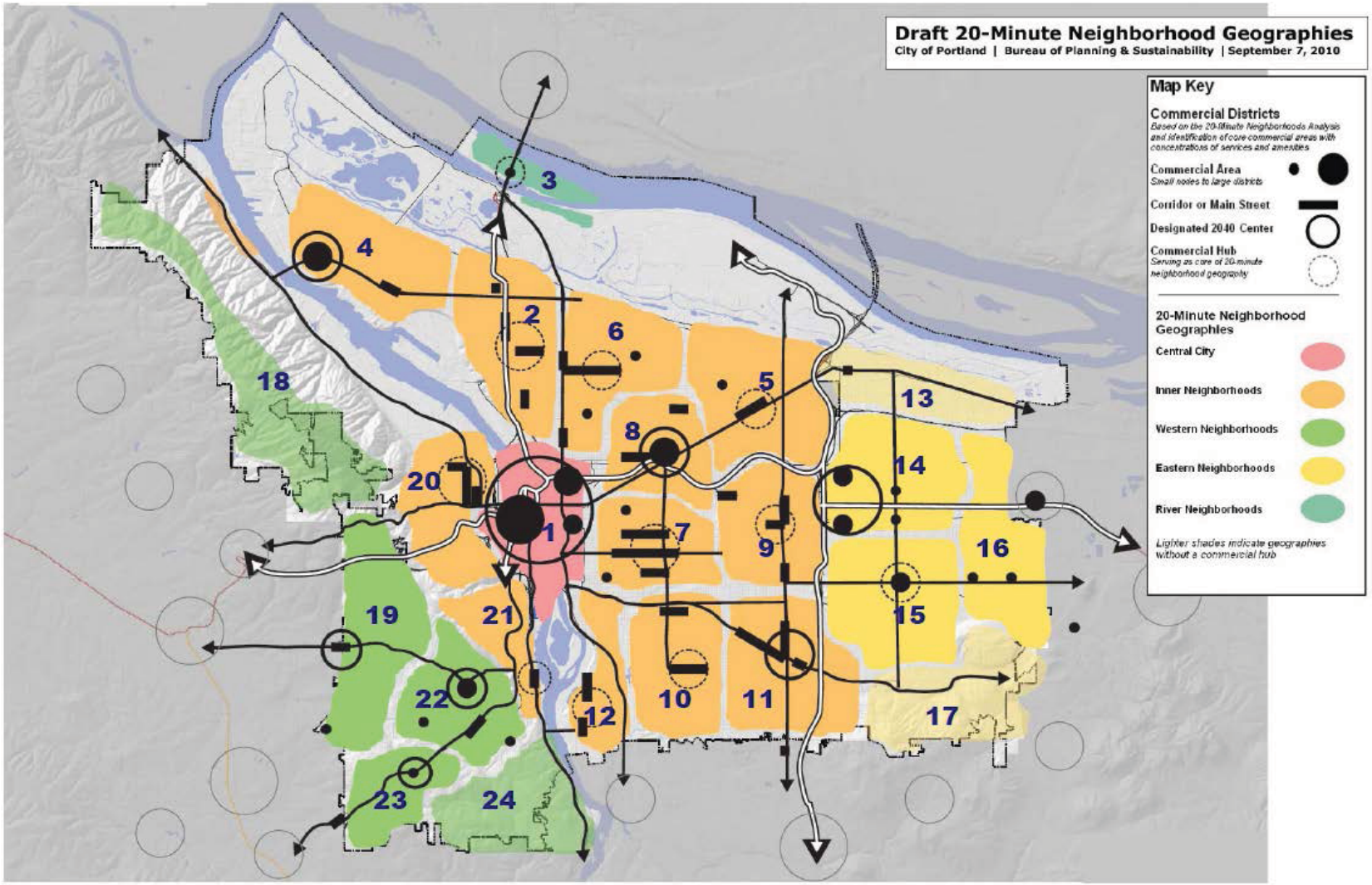
- Numbers and types of jobs
- Numbers and types of firms
- Average annual wages, by type of job

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	64%	96%	95%	2%	70%
2	Interstate Corridor	63	90	23%	7,100	33,600	16%	97%	100%	58%	74%
3	Hayden Island-Bridgeton	26	30	18%	2,100	4,200	7%	29%	34%	0%	3%
4	St. Johns	43	229	22%	7,600	32,500	14%	91%	100%	45%	65%
5	Roseway-Cully	46	341	19%	5,900	34,300	17%	73%	72%	34%	47%
6	MLK-Alberta	65	139	18%	8,000	33,700	41%	98%	98%	49%	81%
7	Belmont-Hawthorne-Division	79	95	23%	10,100	36,900	59%	100%	68%	53%	87%
8	Hollywood	70	40	22%	8,000	34,200	57%	83%	100%	49%	60%
9	Montavilla	63	209	22%	7,200	31,600	34%	82%	100%	40%	49%
10	Woodstock	61	233	25%	6,700	31,300	46%	100%	96%	51%	40%
11	Lents-Foster	57	213	20%	7,000	43,900	32%	91%	100%	42%	43%
12	Sellwood-Moreland-Brooklyn	55	309	23%	5,400	15,300	47%	95%	0%	29%	16%
13	Parkrose-Argay	32	89	17%	6,000	13,800	0%	82%	11%	25%	1%
14	Gateway	48	296	22%	5,500	30,100	27%	97%	98%	24%	12%
15	122nd-Division	47	131	26%	7,600	38,700	18%	99%	91%	33%	17%
16	Centennial-Glenfair-Wilkes	46	87	24%	7,100	31,100	20%	81%	31%	23%	18%
17	Pleasant Valley	15	1301	53%	2,300	11,800	0%	62%	26%	11%	0%
18	Forest Park-Northwest Hills	7	5417	81%	500	8,400	0%	11%	5%	7%	0%
19	Raleigh Hills	22	120	52%	3,000	16,300	18%	56%	89%	12%	7%
20	Northwest	39*	722	53%	5,400	21,900	60%	73%	75%	56%	50%
21	South Portland-Marquam Hill	31	396	56%	3,400	8,400	8%	61%	22%	0%	18%
22	Hillsdale-Multnomah-Barbur	40	192	40%	4,600	19,800	21%	77%	100%	17%	5%
23	West Portland	35	84	42%	4,200	10,800	13%	83%	94%	19%	15%
24	Tryon Creek-Riverdale	15	532	67%	1,900	9,700	4%	19%	26%	7%	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

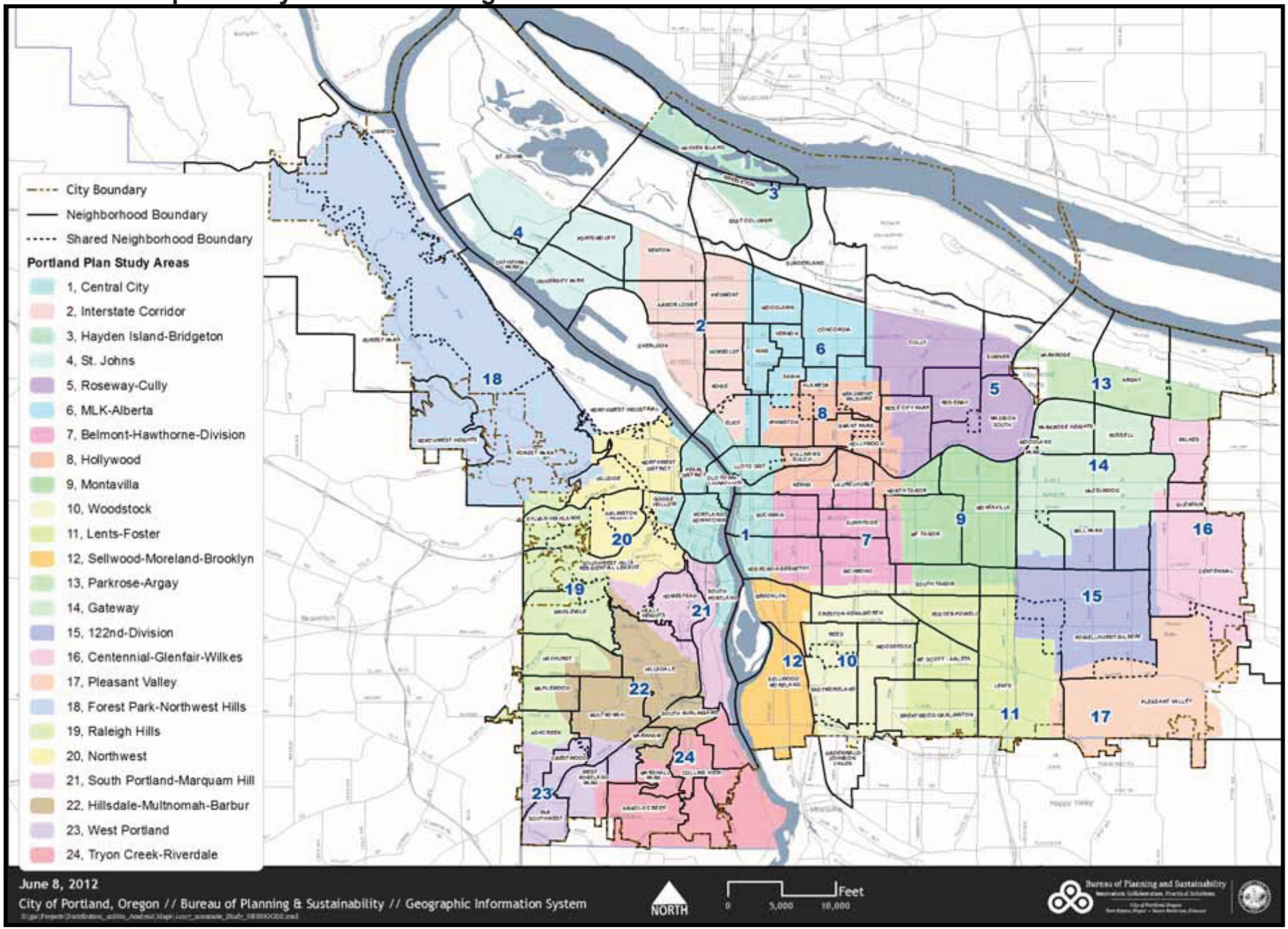
*Score for "flats" portion of analysis area [primilarily the NW District] is 73. Score for hillside areas is 22.

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	33,636	14,318	19,085	4.7	11,200	7,160	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	33,462	11,975	7,052	4.3	9,400	7,780	72	$51,000	$192,000	40%
5	Roseway-Cully	34,273	13,865	11,094	5.8	7,800	5,910	65	$59,000	$224,000	31%
6	MLK-Alberta	33,693	13,872	13,789	4.2	11,300	8,020	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	13,753	5,365	10,477	2.3	10,500	5,980	65	$52,000	$270,000	37%
14	Gateway	30,143	11,842	12,905	5.5	7,800	5,480	54	$53,000	$229,000	39%
15	122nd-Division	38,653	12,987	5,998	5.1	8,800	7,580	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, Amercican 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.

Relationship of Analysis Areas to Neighborhood Association Boundaries



Appendix A: Analysis Area Summaries

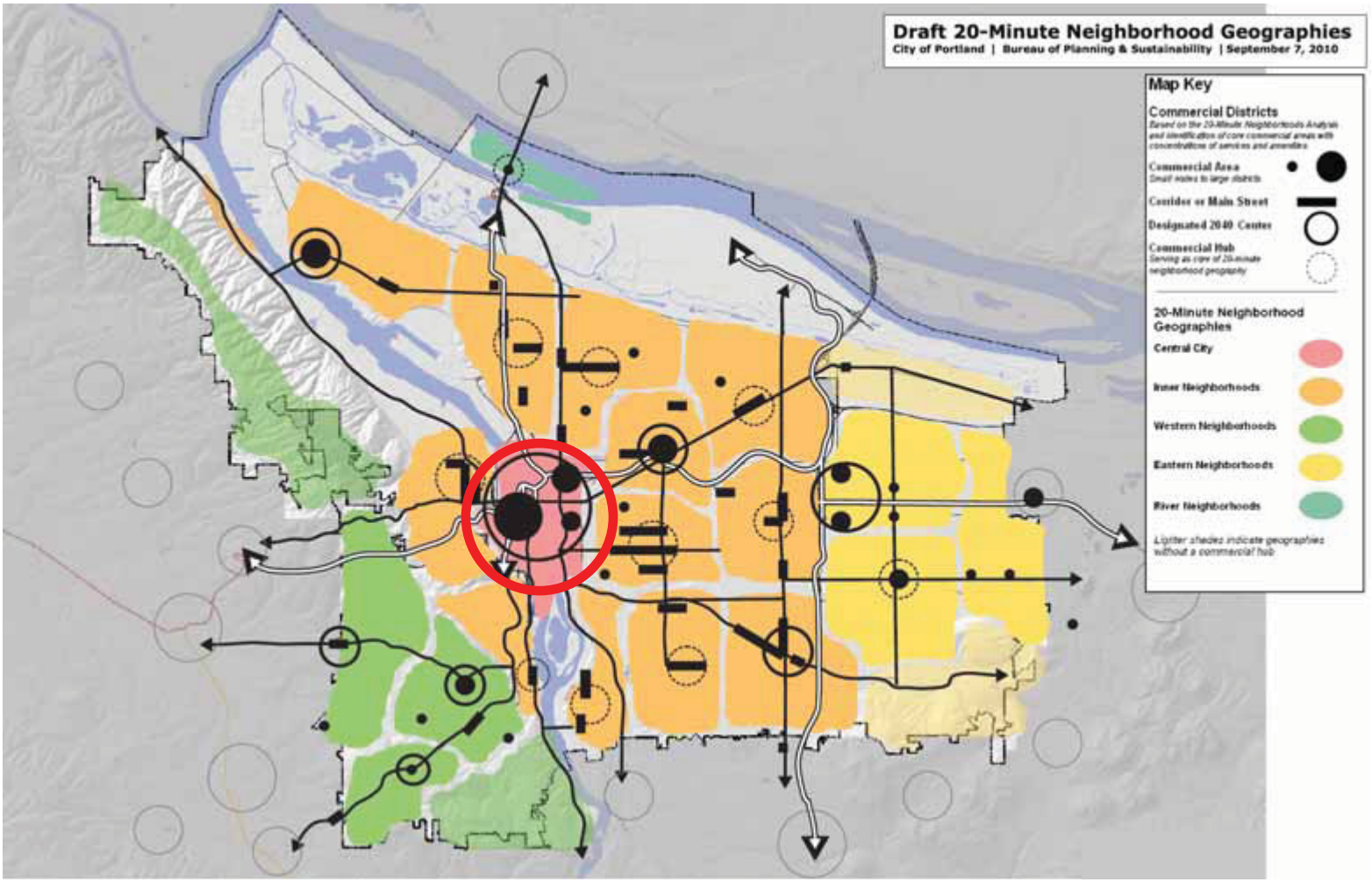
1 Central City
2 Interstate Corridor
3 Hayden Island-Bridgeton
4 St. Johns
5 Roseway-Cully
6 MLK-Alberta
7 Belmont-Hawthorne-Division
8 Hollywood
9 Montavilla
10 Woodstock
11 Lents-Foster
12 Sellwood-Moreland-Brooklyn
13 Parkrose-Argay
14 Gateway
15 122nd-Division
16 Centennial-Glenfair-Wilkes
17 Pleasant 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

1

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

June 5, 2012

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 (1 store per 2,629 households)

Retail gap: $1.4 billion surplus *(amount of estimated yearly retail sales that is beyond what the analysis area population be expected to support, indicating the regional market of the area's retail)*

Community Amenities

Proximity to Services and Amenities

Percentage of population:

Within 1/2 mile of a park*:	96%
Within 1/2 mile of a public elementary school:	2%
Within 3 miles of a full-service community center*:	95%
Within 1/2 mile of a full-service grocery store:	64%
Within 1/4 mile of a frequent service transit stop:	70%

**Parks Bureau service standard*

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

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)

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

Urban Form Characteristics

The Central City is Portland's most intensely urbanized area, with its largest concentration of tall buildings, high-density residential development, jobs and cultural institutions, and includes large amounts of retail and other commercial services. The area features a highly interconnected pedestrian system, with a street structure shaped by small 200' by 200' blocks. An exception to this is the Lloyd District, which includes large superblocks. The Central City is located at the center of the region's transit system, and it includes an extensive system of urban parks. The downtown core is edged by natural and built boundaries, including the Willamette River and the I-405 Freeway.

Access issues. Excellent street and sidewalk connectivity. Excellent access to transit and to commercial and community services, an exception being the lack of a neighborhood elementary school.

2040 Growth Concept: Designated Mixed-Use Areas

The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.

Mixed-Use Center:	2,450 acres *(Central City)*
Main Streets:	4.3 miles (Burnside, NE Martin Luther King Jr. Blvd, Belmont, Hawthorne, Division)
Station Communities:	21

Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	2	.1%	.3
Multi-Family Residential:	144	10%	34
Commercial/Mixed-Use:	890	60%	321
Employment:	35	2%	12
Industrial:	341	23%	14
Open Space:	67	5%	NA

**From Buildable Lands Inventory (vacant or underutilized)*

Anticipated Growth by 2035

(From Buildable Lands Inventory allocations, based on development capacity and trend information)

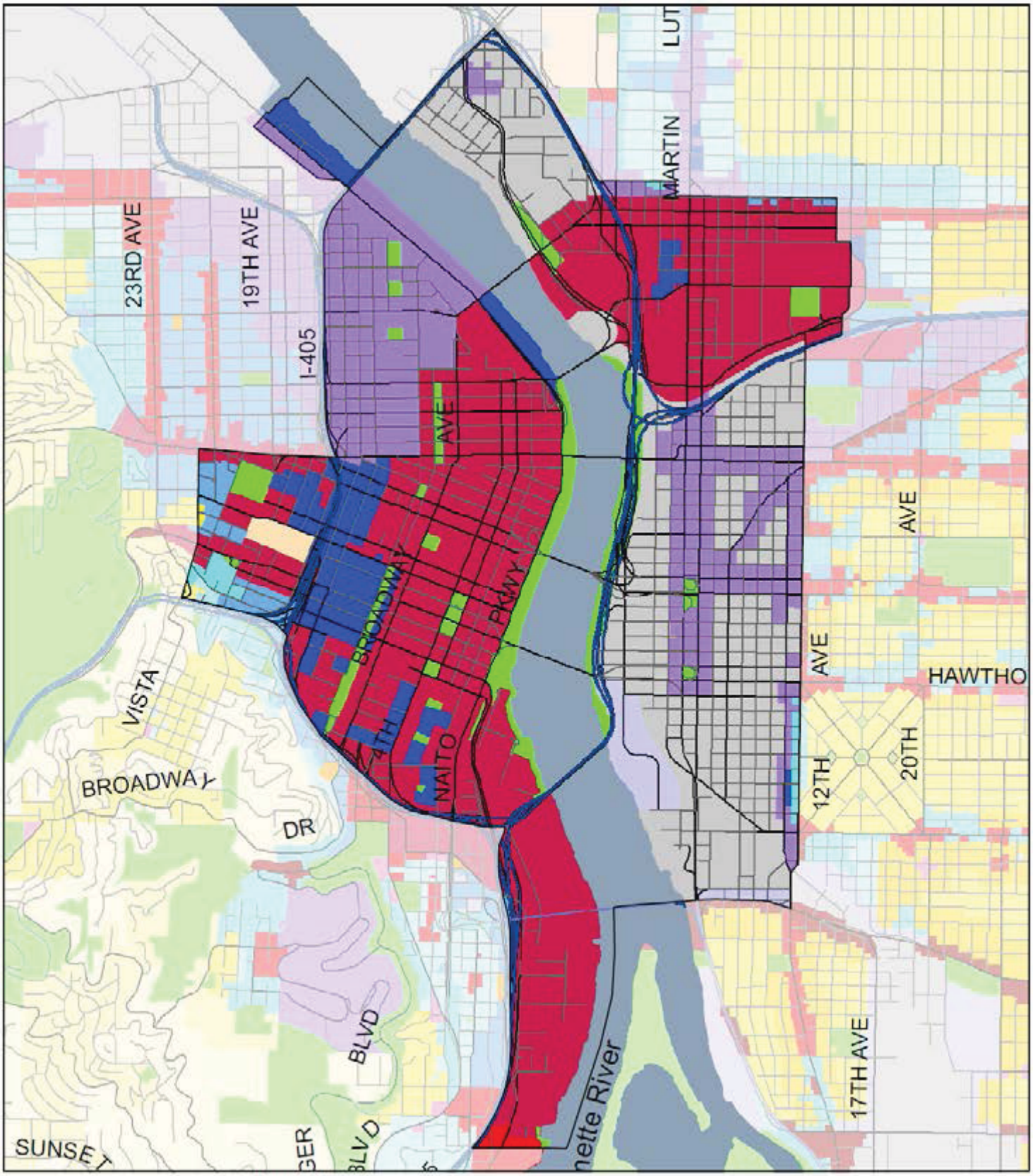
2010 Housing Units (Census):	21,821
2035 Housing Units:	45,900

Comprehensive Plan Designations Map *(next page)*

Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

Central City Analysis Area



Comprehensive Plan Designations

February 1, 2012

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Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	

NORTH

0 1,000 2,000 3,000 Feet

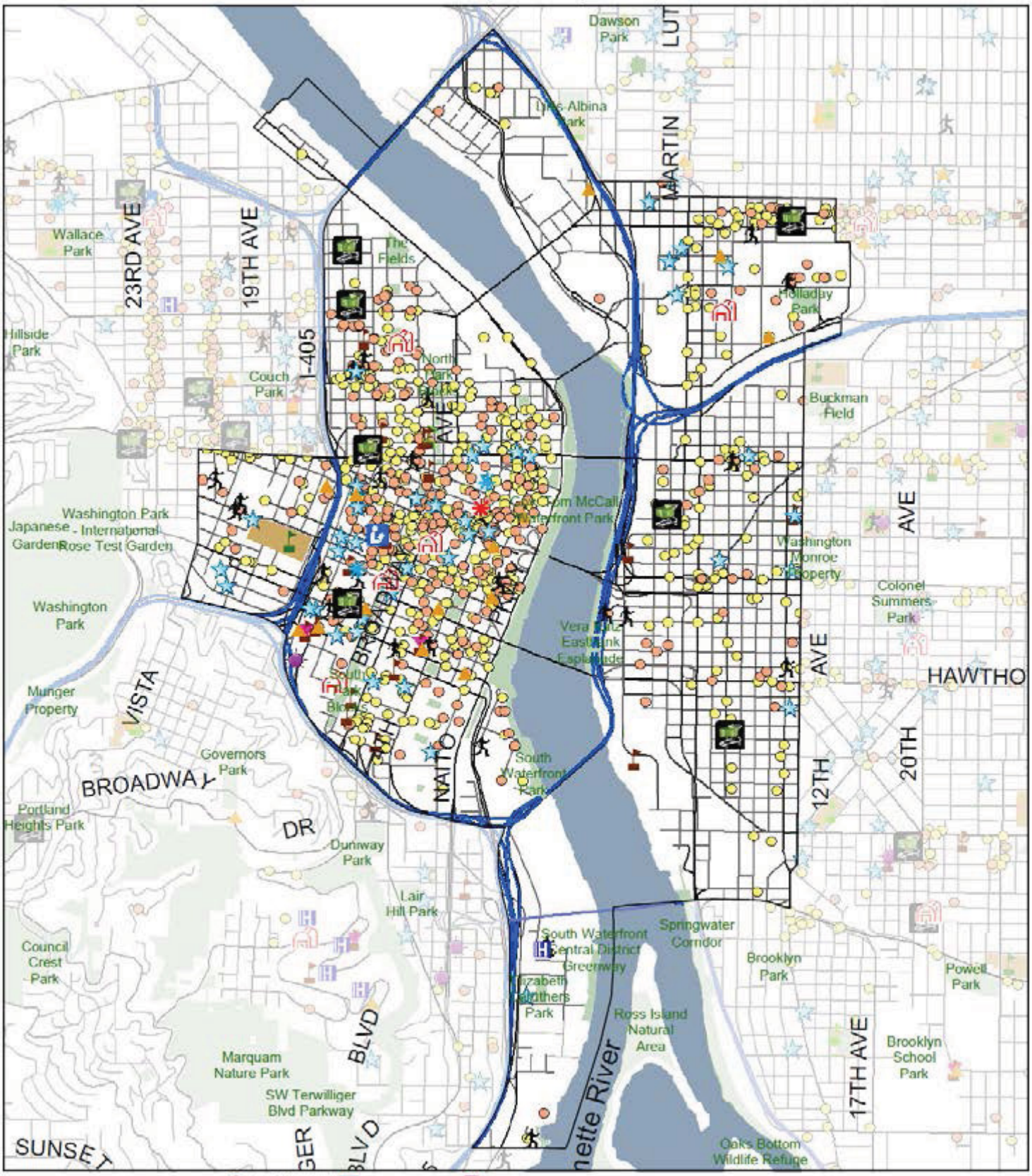
Bureau of Planning and Sustainability

Innovation. Collaboration. Practical Solutions.

City of Portland, Oregon

Sam Adams, Mayor · Susan Anderson, Director

Central City Analysis Area



Services and Amenities

August 9, 2011

commercial data: InfoUSA 2008

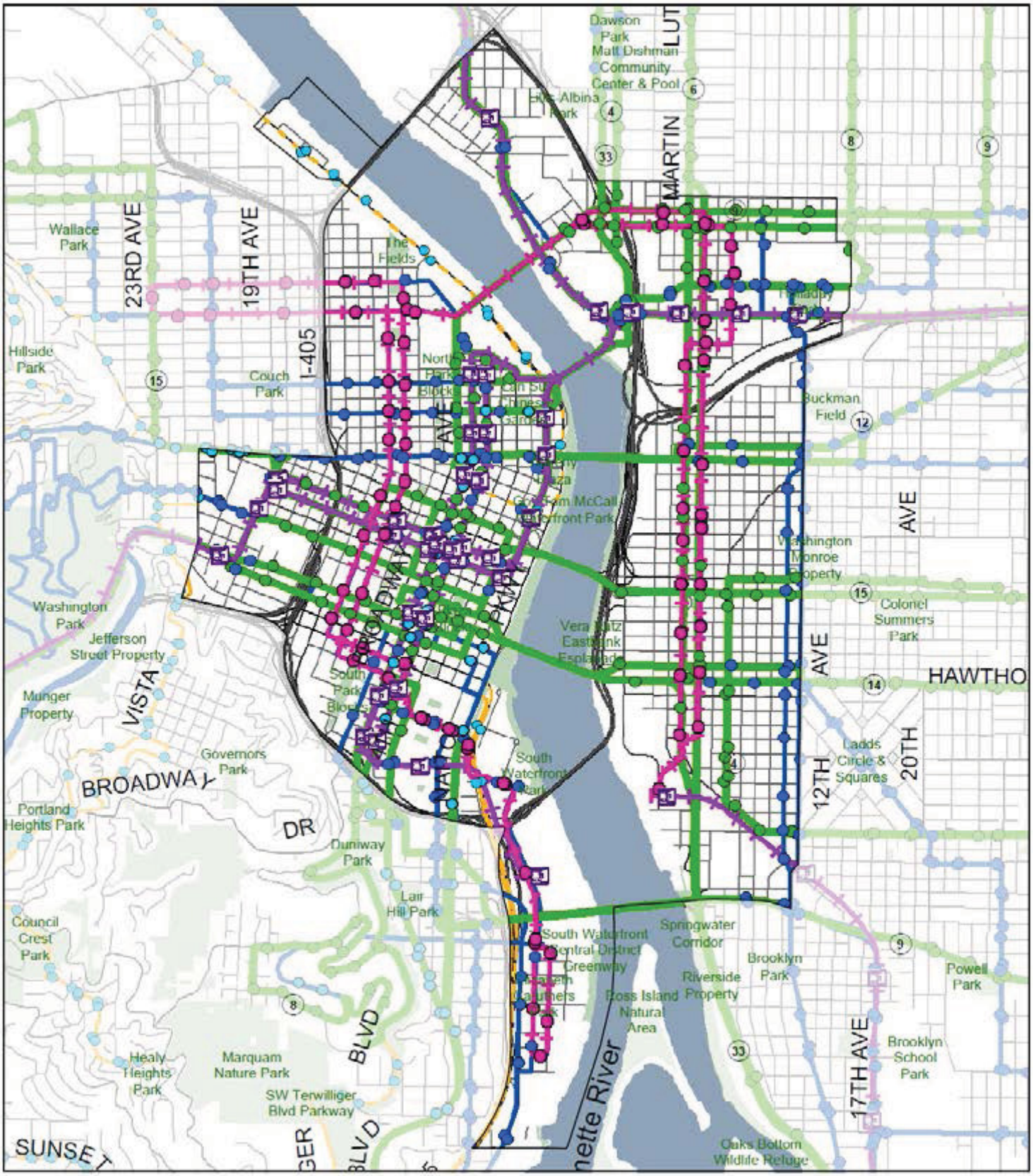
Type 1 Commercial
Type 2 Commercial
Commercial Cluster
Fitness Centers
Grocery Stores
Places of Worship
Libraries
Farmers Markets
Community Gardens
Community Centers
County Health Clinic
County Aging Services
Preschools
Daycare Centers
Public HS
Public K-8
Private Schools

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

Central City Analysis Area



Transit Infrastructure

Light Rail Stops
- MAX
- Street Car
- MAX
- Streetcar

Bus Stops
- Frequent Stops
- Standard Stops
- Rush Hour Stops
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

February 1, 2012

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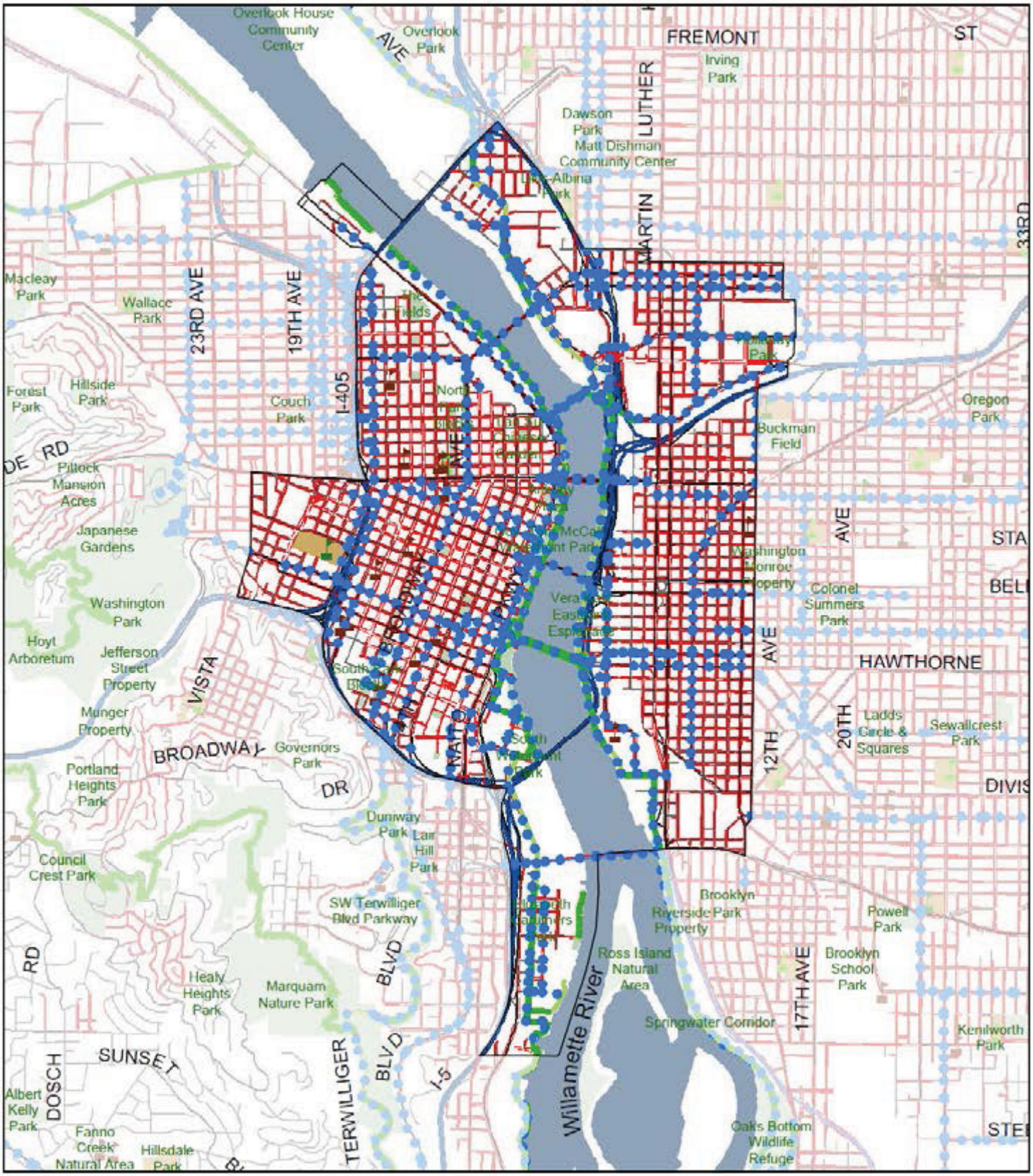
Central City Analysis Area



Sidewalks and Bicycle Infrastructure

August 9, 2011

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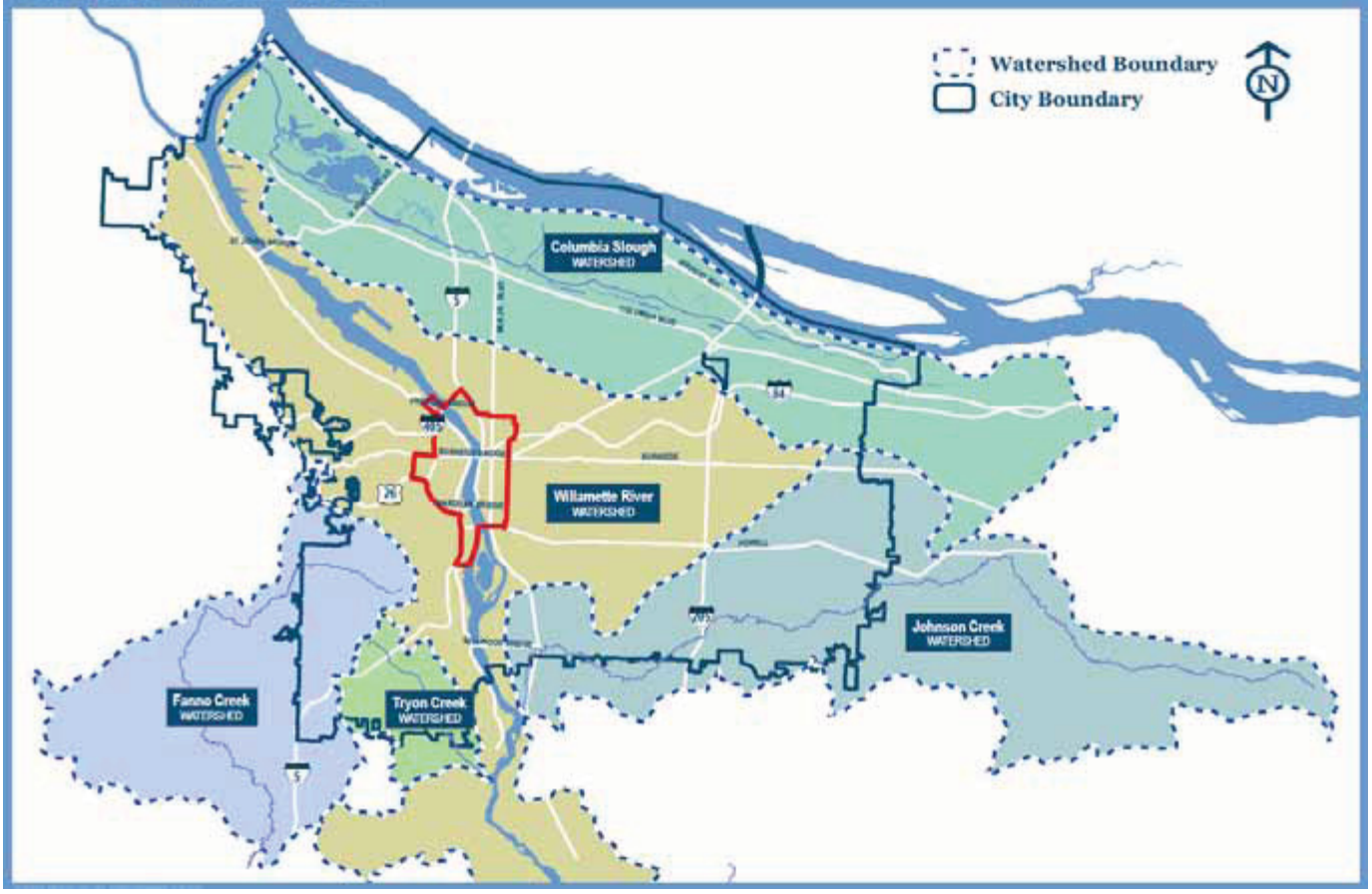
Sidewalks
Existing Bike Facility
regional trails outside Portland (existing)
regional trails in Portland
Public HS
Public K-8
Private Schools

NORTH

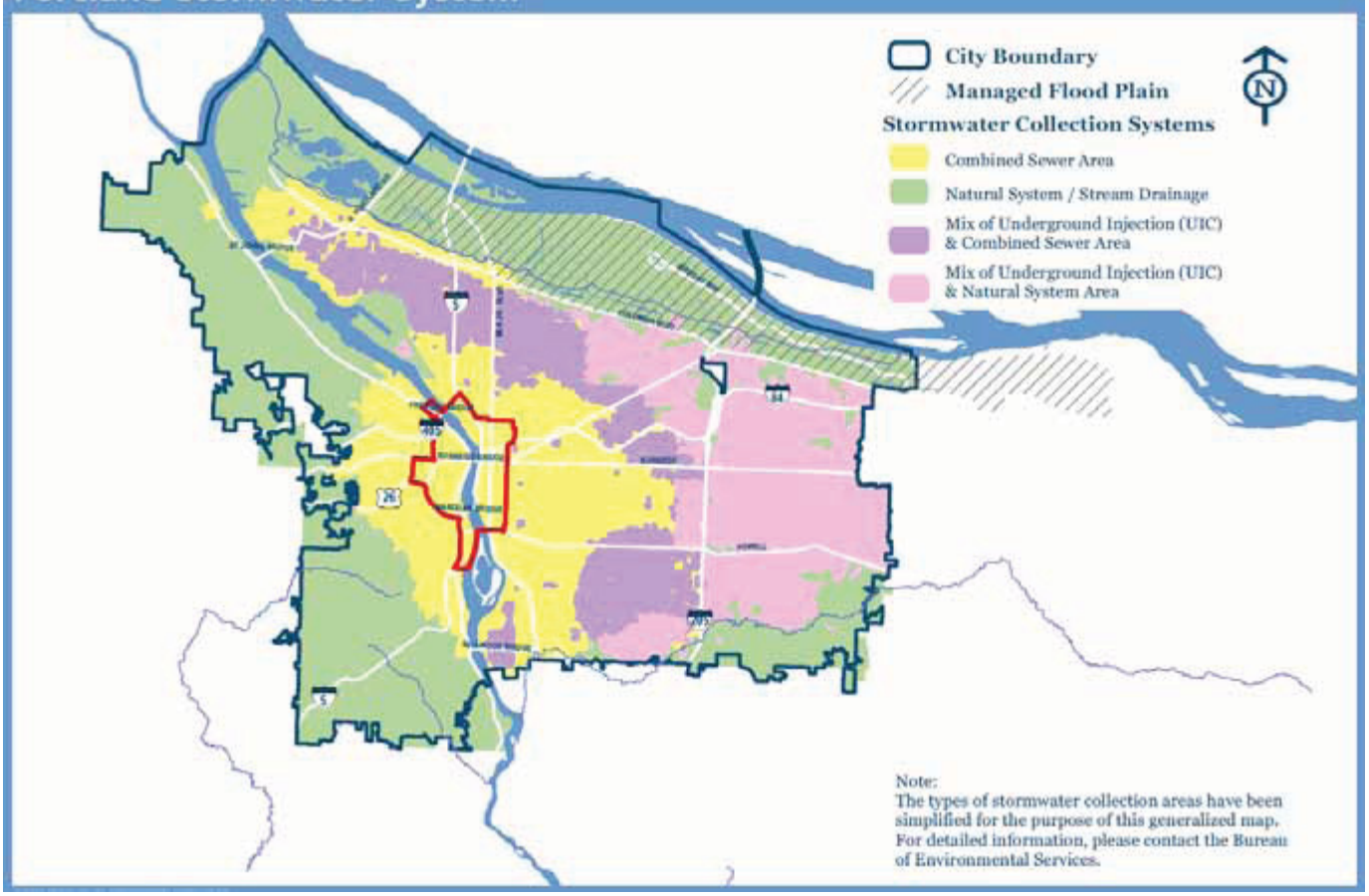
0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

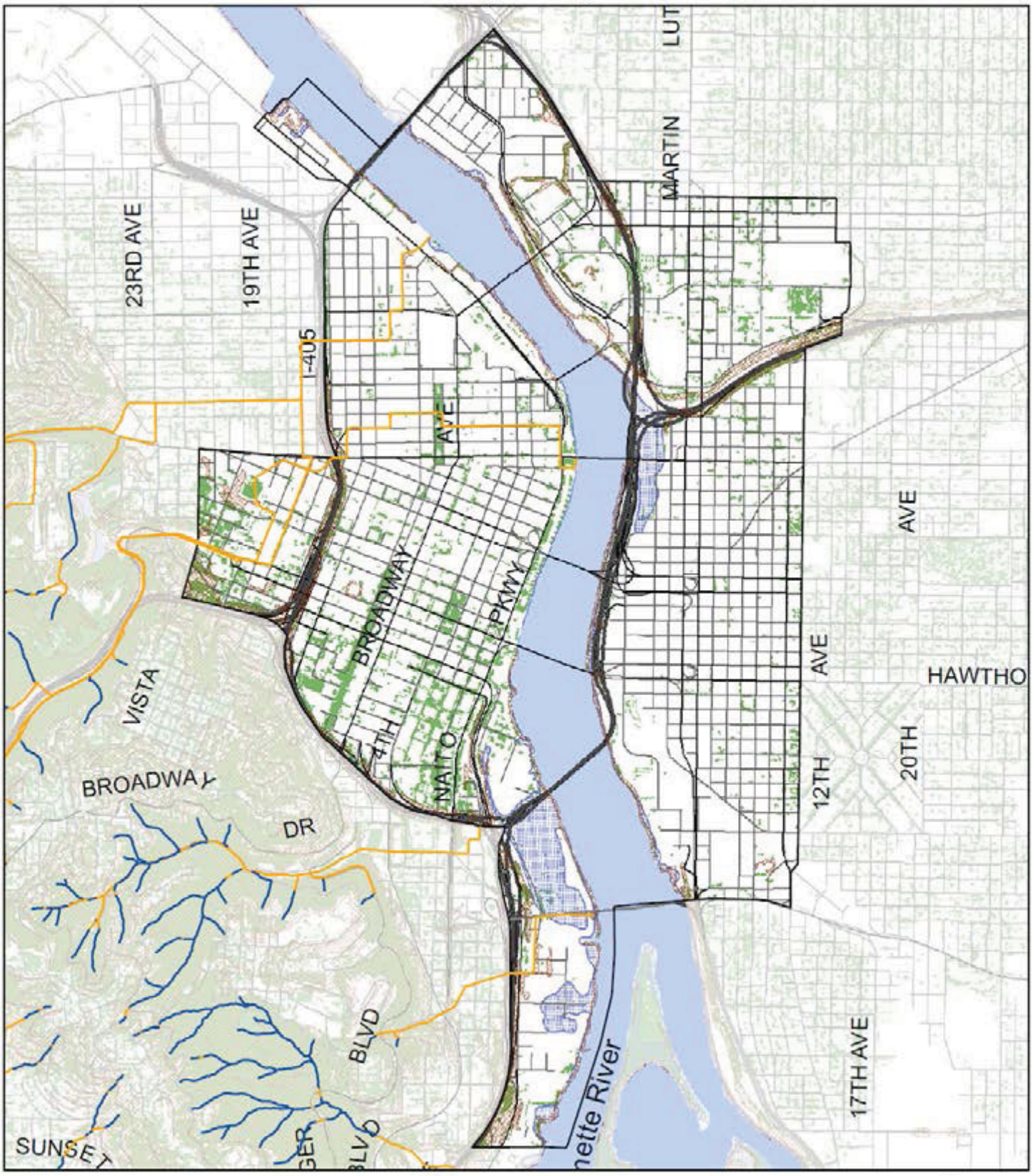
Portland Watersheds



Portland Stormwater System



Central City Analysis Area



Watersheds and Natural Features

Slope Hazard
High Structure Vegetation
FEMA 100-year floodplain
Waterbodies
Open channel stream
Piped/culverted stream
City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

August 9, 2011

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Central City Analysis Area
Demographics (2000 – 2010)

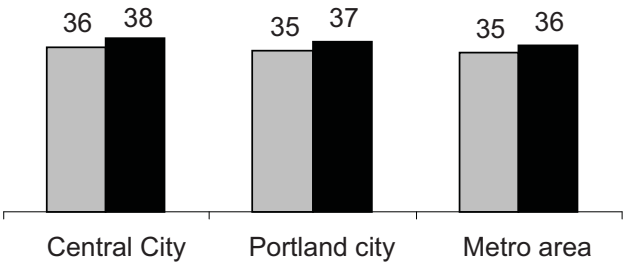
ESRI Business Analyst and US Census 2010 (except as noted)

Population

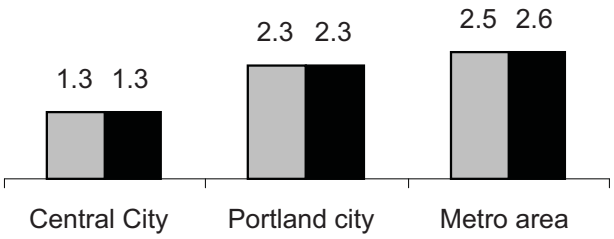
	Central City	Portland city	Metro area
2010	30,931	583,776	2,226,009
2000	19,202	529,121	1,927,881
% change	61%	10%	15%

2000 2010

Median Age

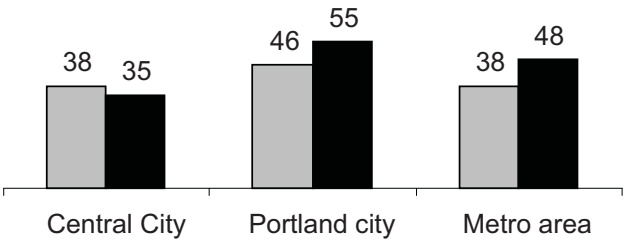


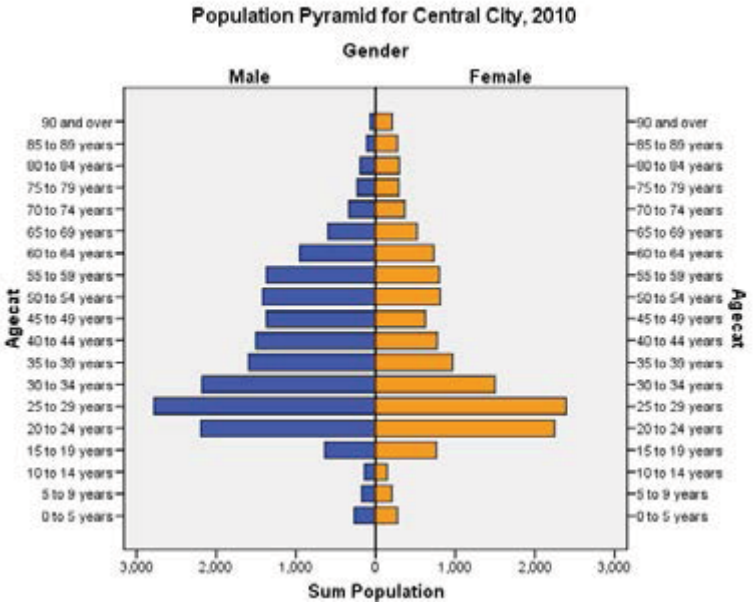
Average Household Size

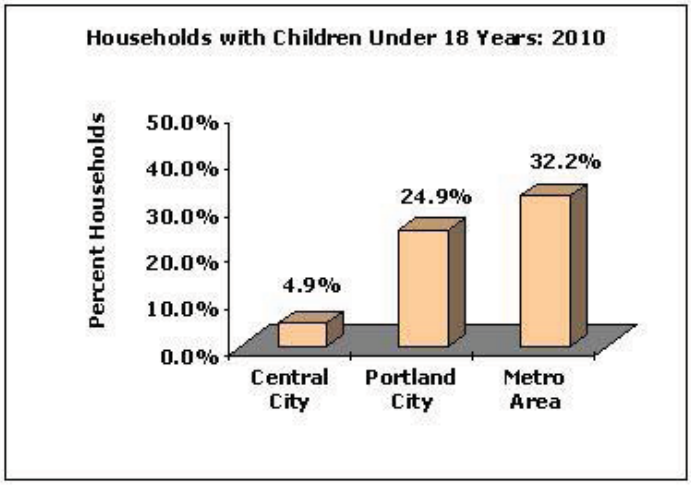


Diversity Index

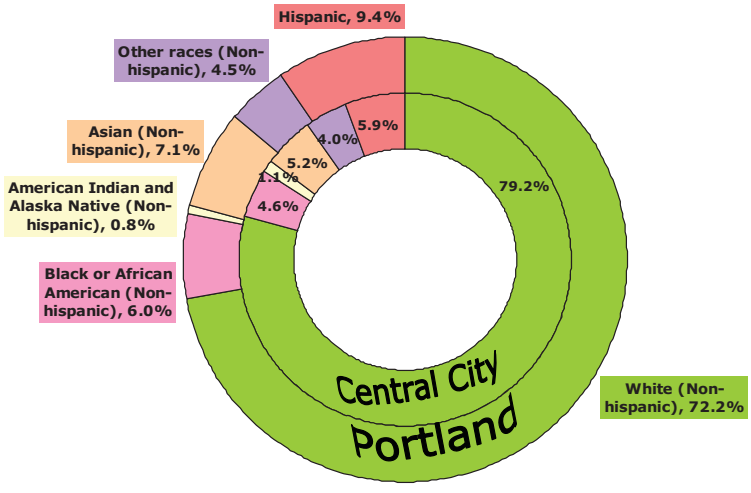
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



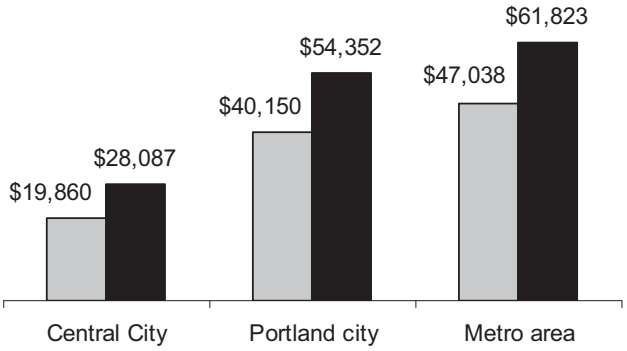


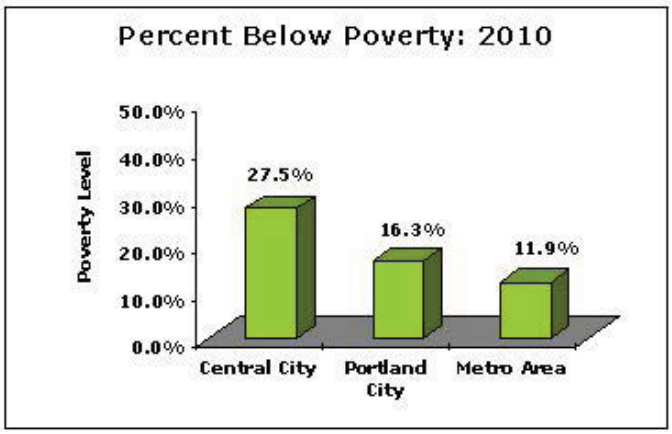


Racial & Ethnic Distribution in Portland vs. Central City



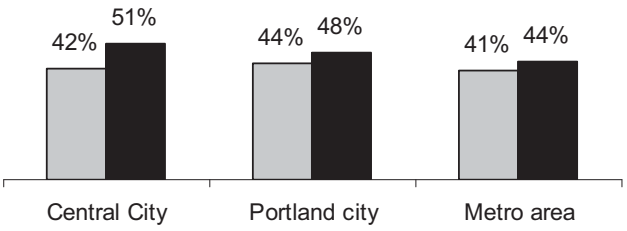
Median Household Income



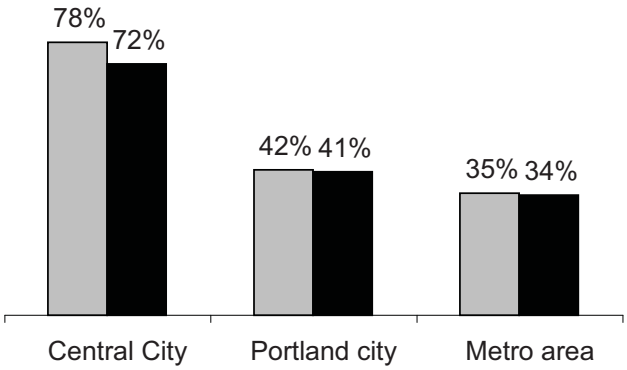


ACS 2006-2010

Percent College Graduates



Percent Renters of Occupied Housing Units



Median Home Value

	Central City	Portland city	Metro area
2010	$400,314	$253,184	$273,500
2000	$250,566	$154,721	$168,347
% change	59.8%	63.6%	62.5%

Central City Analysis Area
Commercial Real Estate Indicators

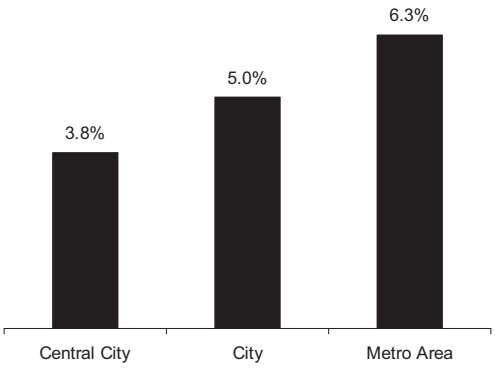
Retail and Commercial Real Estate data through 9-16-2010
Source: COSTAR

RETAIL

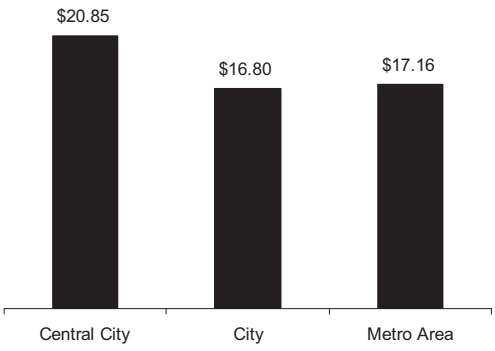
Square Feet

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

Retail Vacancy



Retail Rents

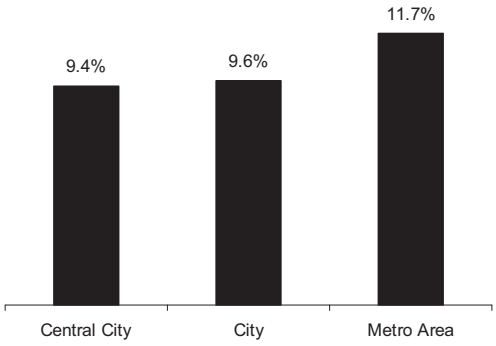


OFFICE SPACE

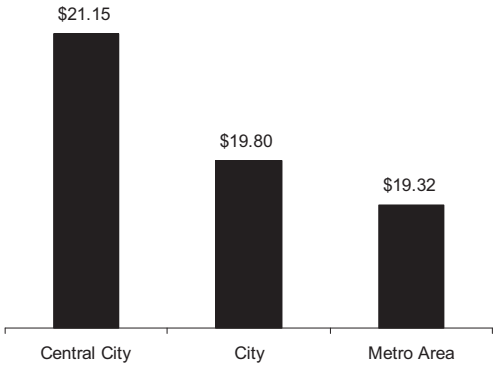
Square Feet

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

Office Vacancy



Office Rents

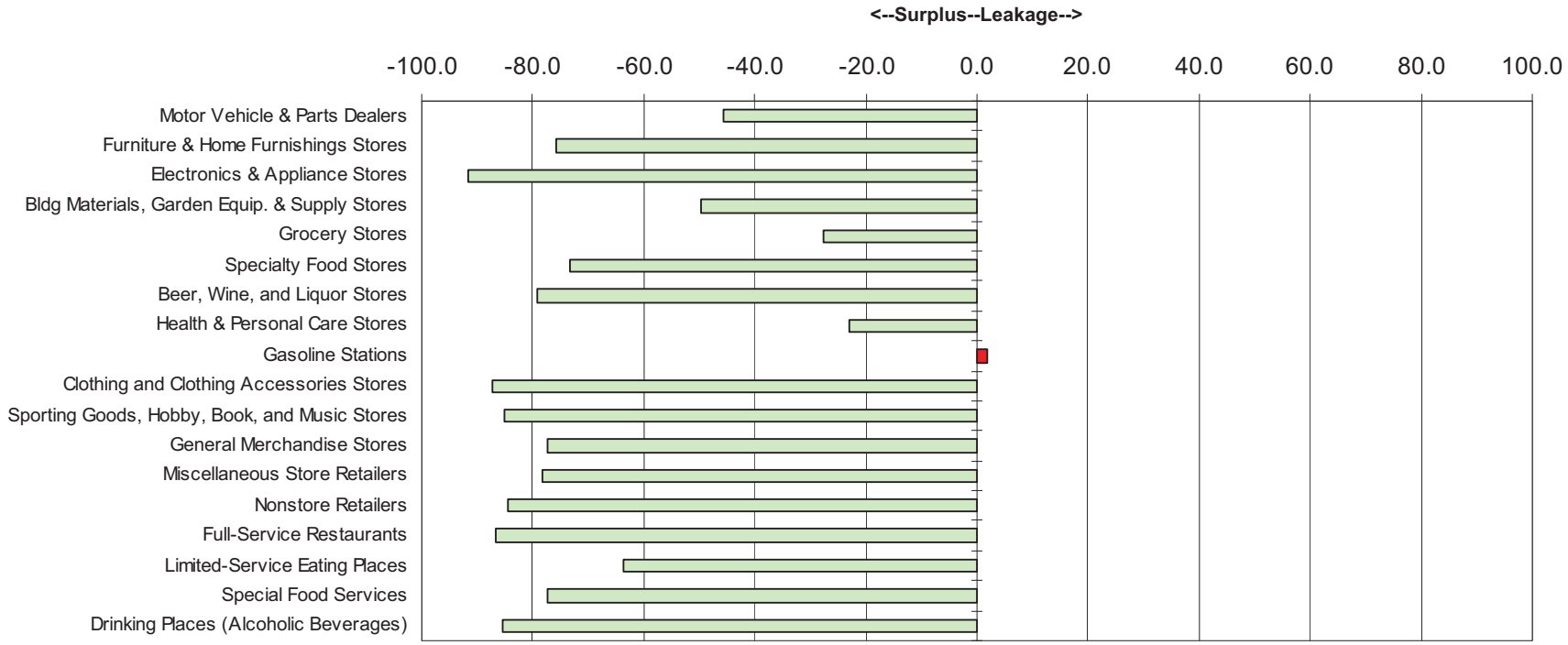


Central City Analysis Area
Retail Market Profile

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 the difference between the potential spending in an area, based on population, 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." (Source: ESRI Business Analyst)



Central City Analysis Area
Employment

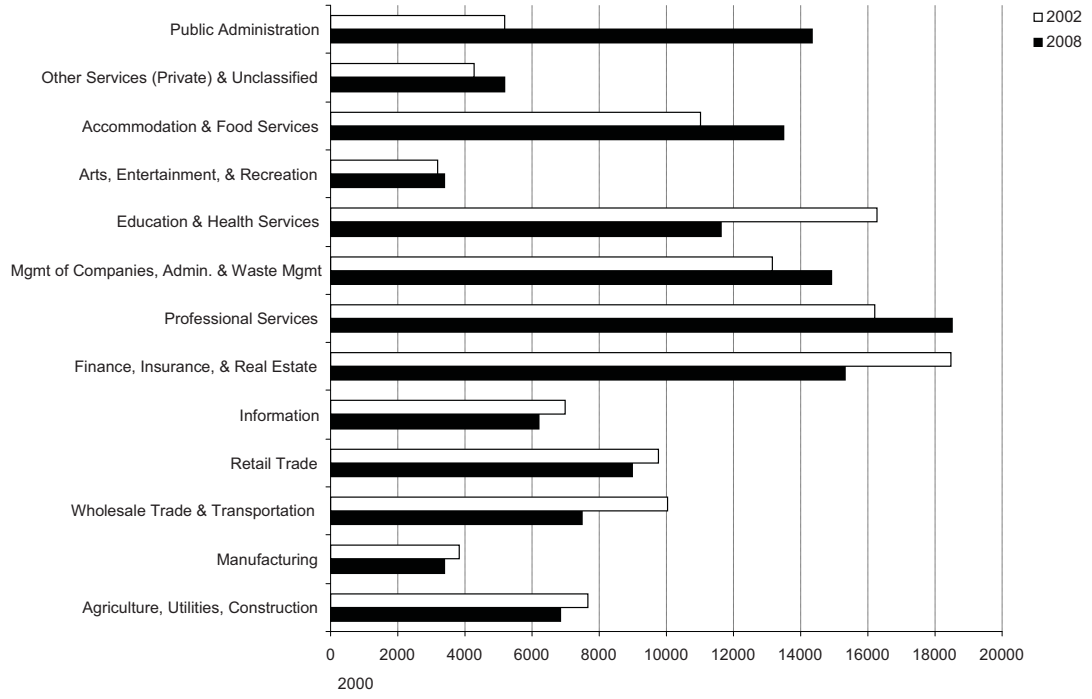
Quarterly Census of Employment and Wages data for 2002 & 2008
Source: Oregon Employment Department (OED)

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.

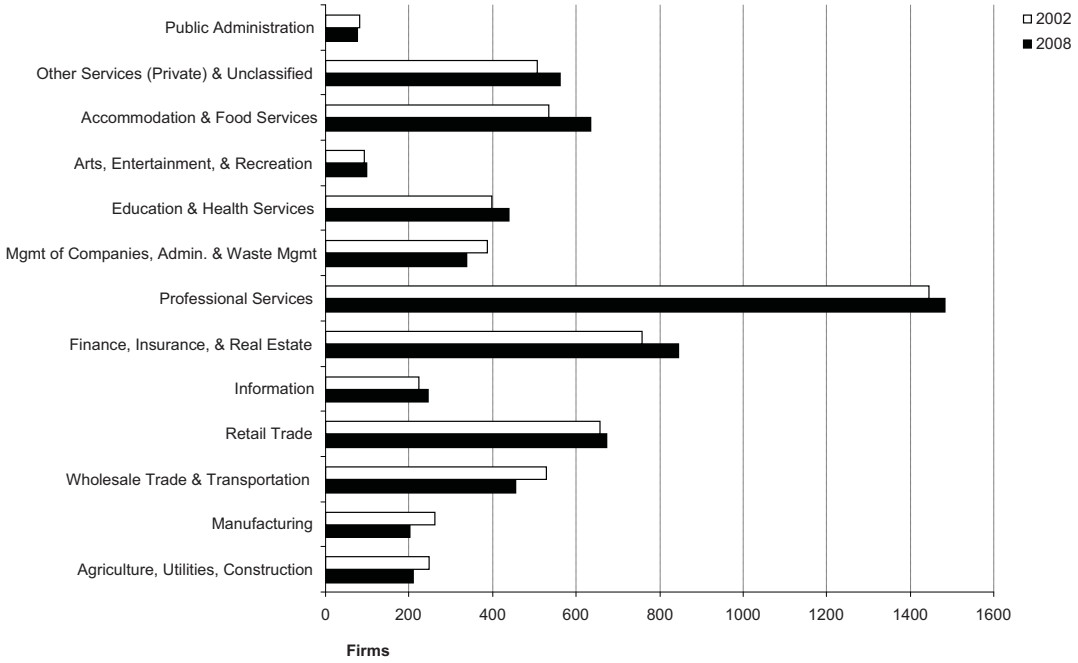
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices 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

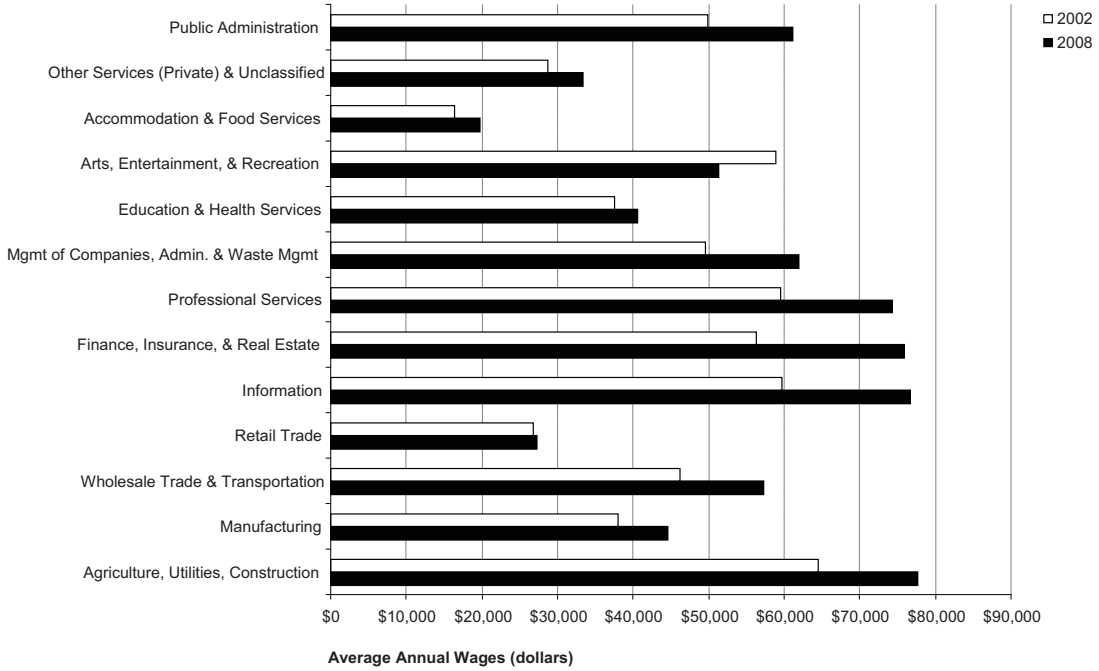
Total Jobs



Total Firms



Average Annual Wages

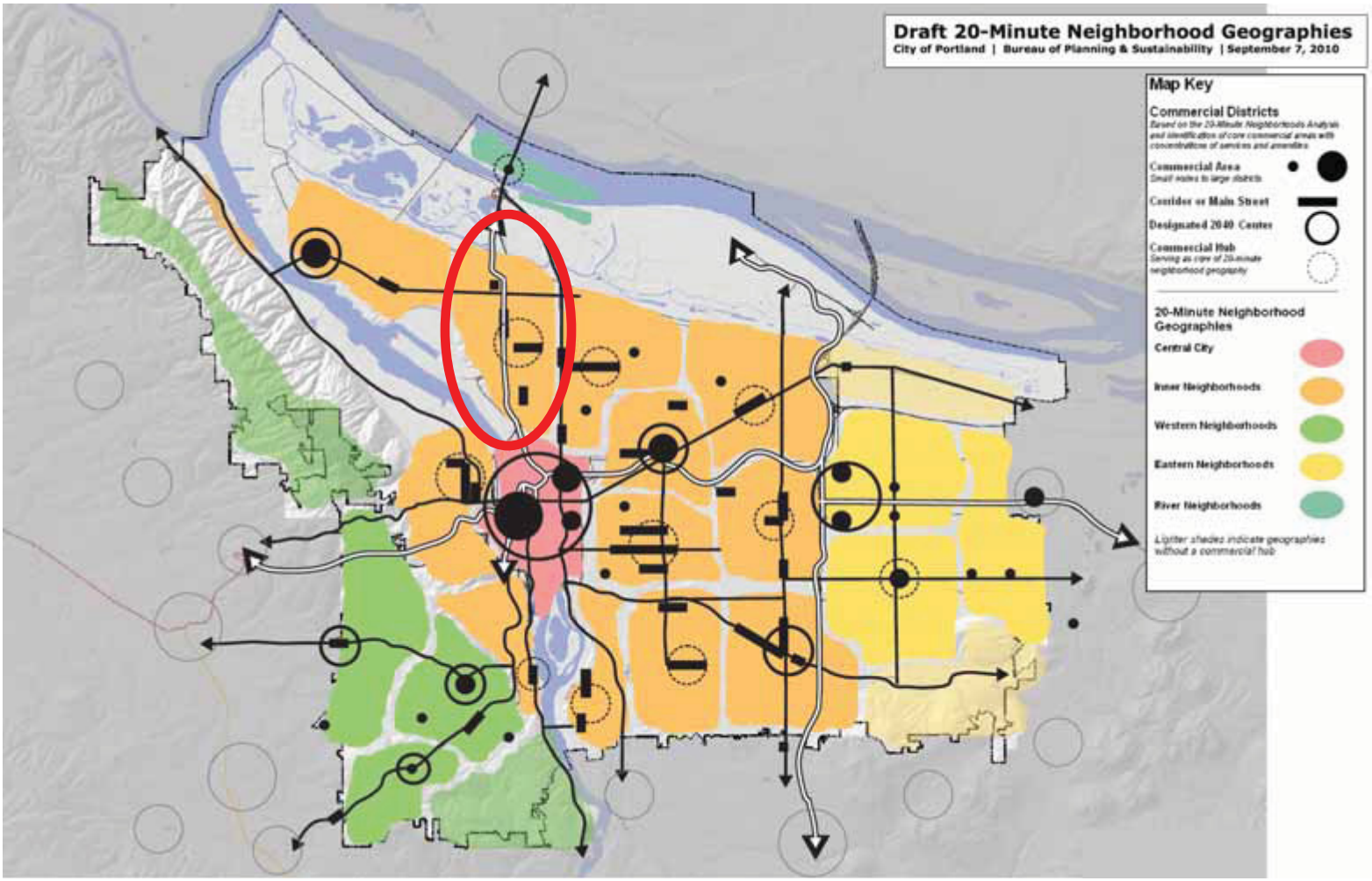


2

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

June 5, 2012

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: 33,600 people (14,300 households)
Land Area: 4.7 square miles (7,100 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 (1 store per 7,150 households)

Retail gap: $37 million gap *(amount of estimated yearly retail spending by the analysis area population that is that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area)*

Community Amenities

Proximity to Services and Amenities

Percentage of population:

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:	74%

**Parks Bureau service standard*

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: 23%

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: 3 (Interstate and Kenton farmers markets, Market Q)

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)

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

Urban Form Characteristics

Much of this area is composed of a grid of residential blocks, originally developed during the Streetcar Era with a continuous system of sidewalks. Interstate Avenue is the area's most significant street corridor, served by light rail transit and including a mix of auto-oriented and more recent transit-oriented development. The area also includes several main street business districts. The I-5 Freeway is located through the center of the area. Residential areas are separated by a bluff from industrial areas located along the Willamette riverfront.

Access issues. Good street and sidewalk connectivity, but the I-5 Freeway acts as a barrier. Good access to transit and relatively good access to commercial and community services.

2040 Growth Concept: Designated Mixed-Use Areas

The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.

Mixed-Use Centers:	0
Main Streets:	2.9 miles (Lombard, Killingsworth, Denver)
Station Communities:	6

Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,058	54%	73
Multi-Family Residential:	508	26%	228
Commercial/Mixed-Use:	201	10%	99
Employment:	14	1%	7
Industrial:	66	3%	5
Open Space:	104	5%	NA

**From Buildable Lands Inventory (vacant or underutilized)*

Anticipated Growth by 2035

(From Buildable Lands Inventory allocations, based on development capacity and trend information)

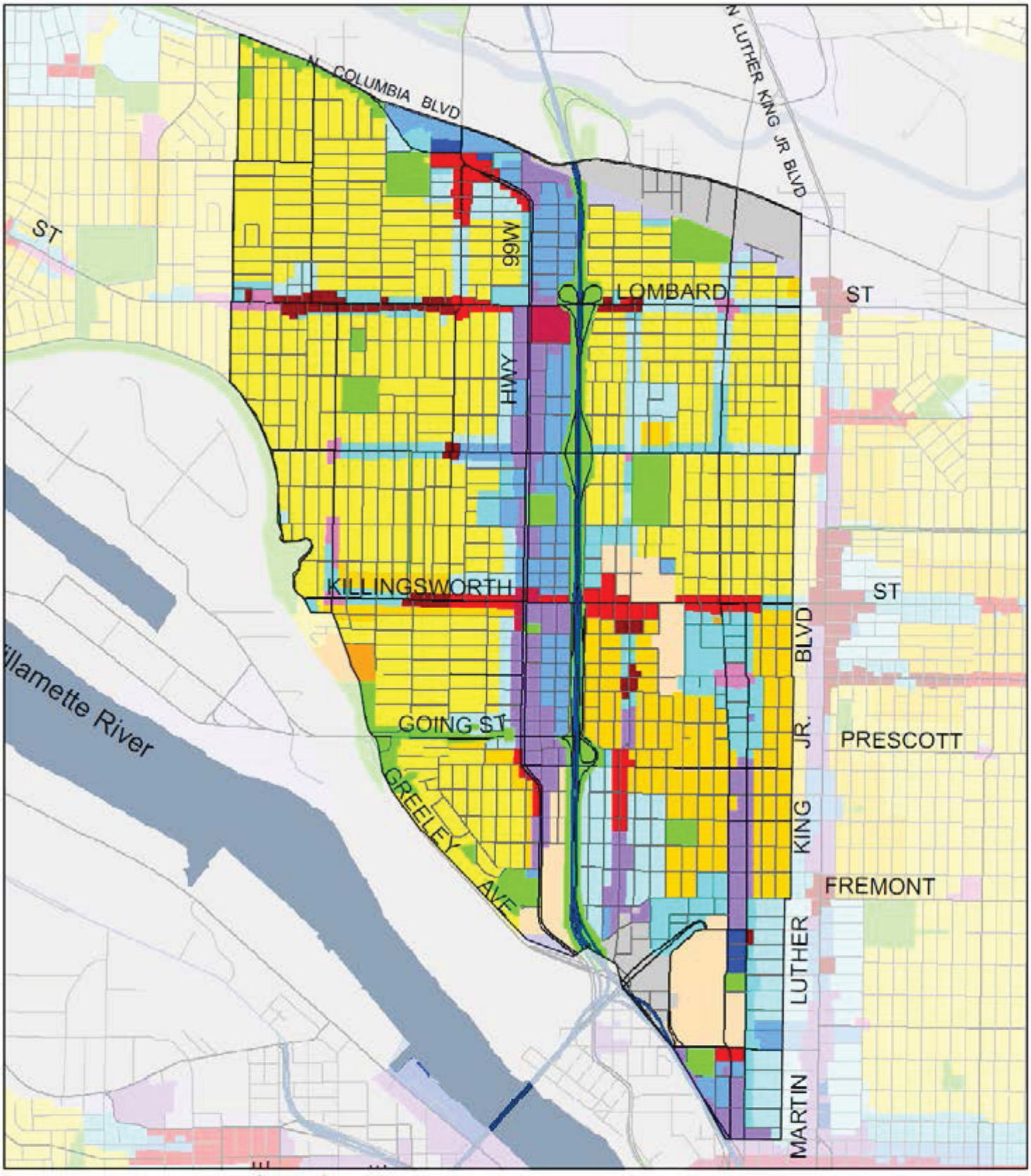
2010 Housing Units (Census):	15,128
2035 Housing Units:	26,700

Comprehensive Plan Designations Map *(next page)*

Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

Interstate Corridor Analysis Area



Comprehensive Plan Designations

February 1, 2012

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Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	

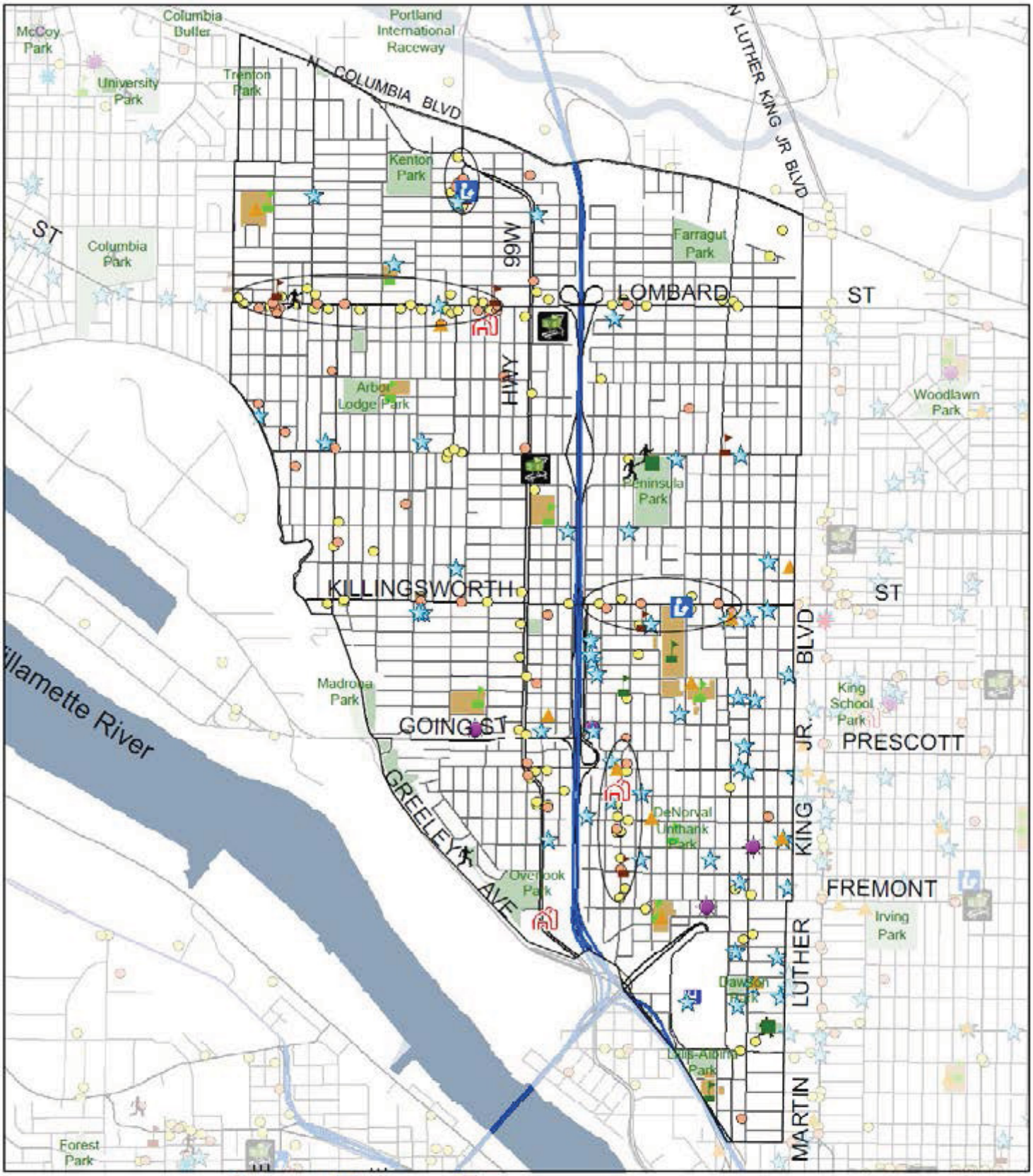
NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

Innovation. Collaboration. Practical Solutions.

Interstate Corridor Analysis Area



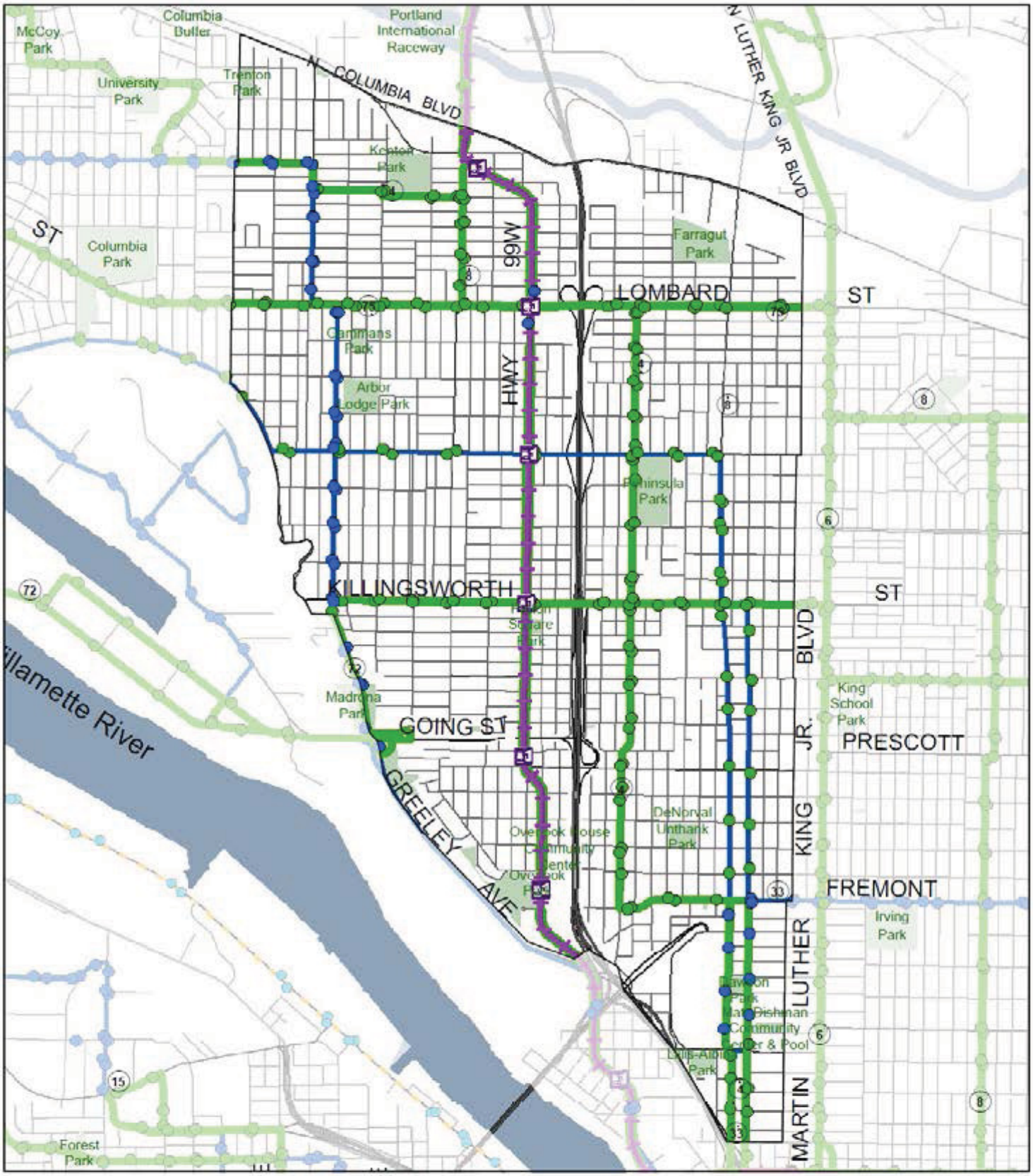
Services and Amenities

February 1, 2012

commercial data: InfoUSA 2008

Bureau of Planning and Sustainability

Interstate Corridor Analysis Area



Transit Infrastructure

Light Rail Stops
- MAX
- Street Car

MAX
- Streetcar

Bus Stops
- Frequent Stops
- Standard Stops
- Rush Hour Stops

Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

February 1, 2012

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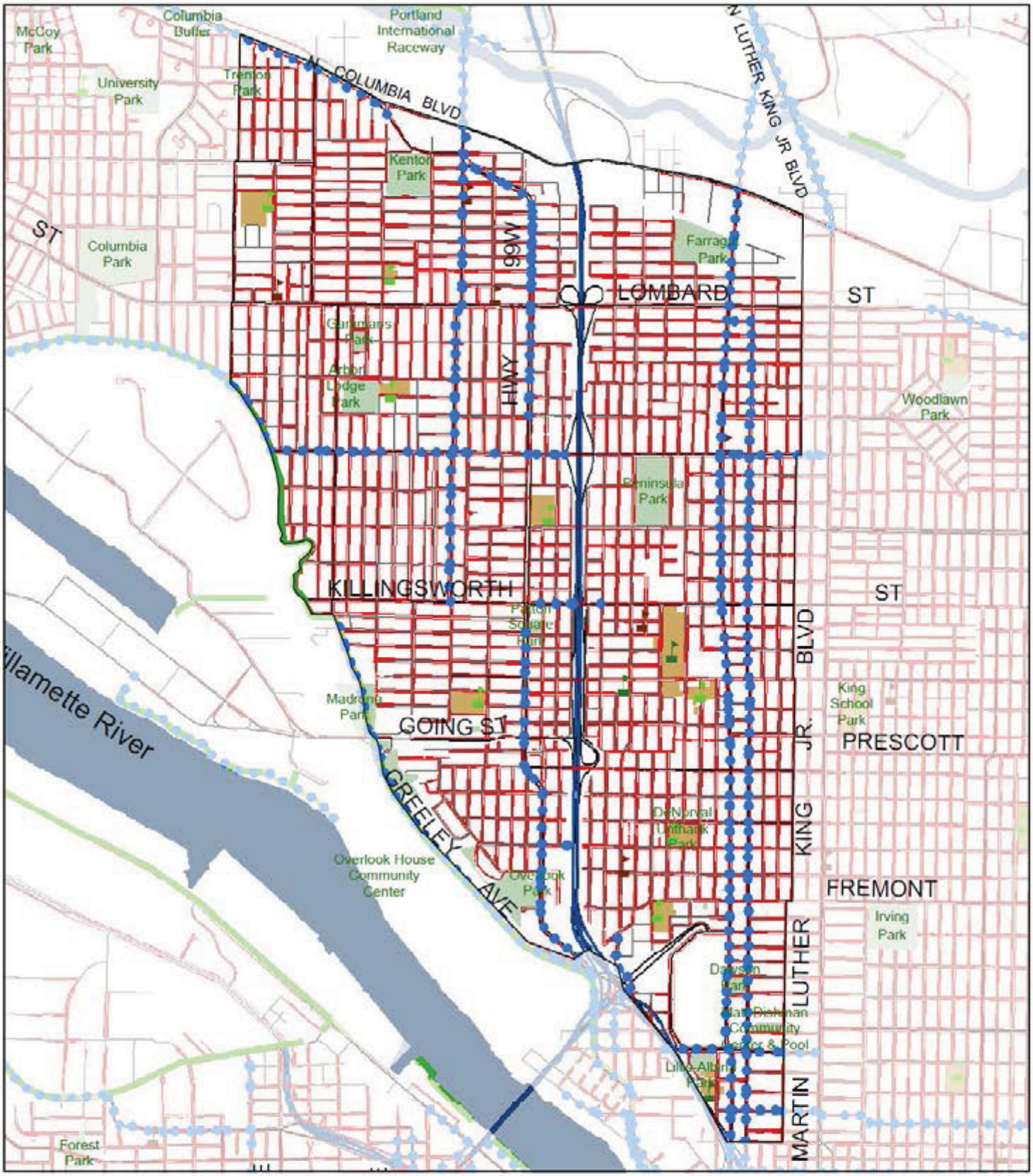
Interstate Corridor Analysis Area



Sidewalks and Bicycle Infrastructure

February 1, 2012

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Sidewalks
Existing Bike Facility
regional trails outside Portland (existing)
regional trails in Portland
Public HS
Public K-8
Private Schools

NORTH

0 1,000 2,000 3,000 Feet

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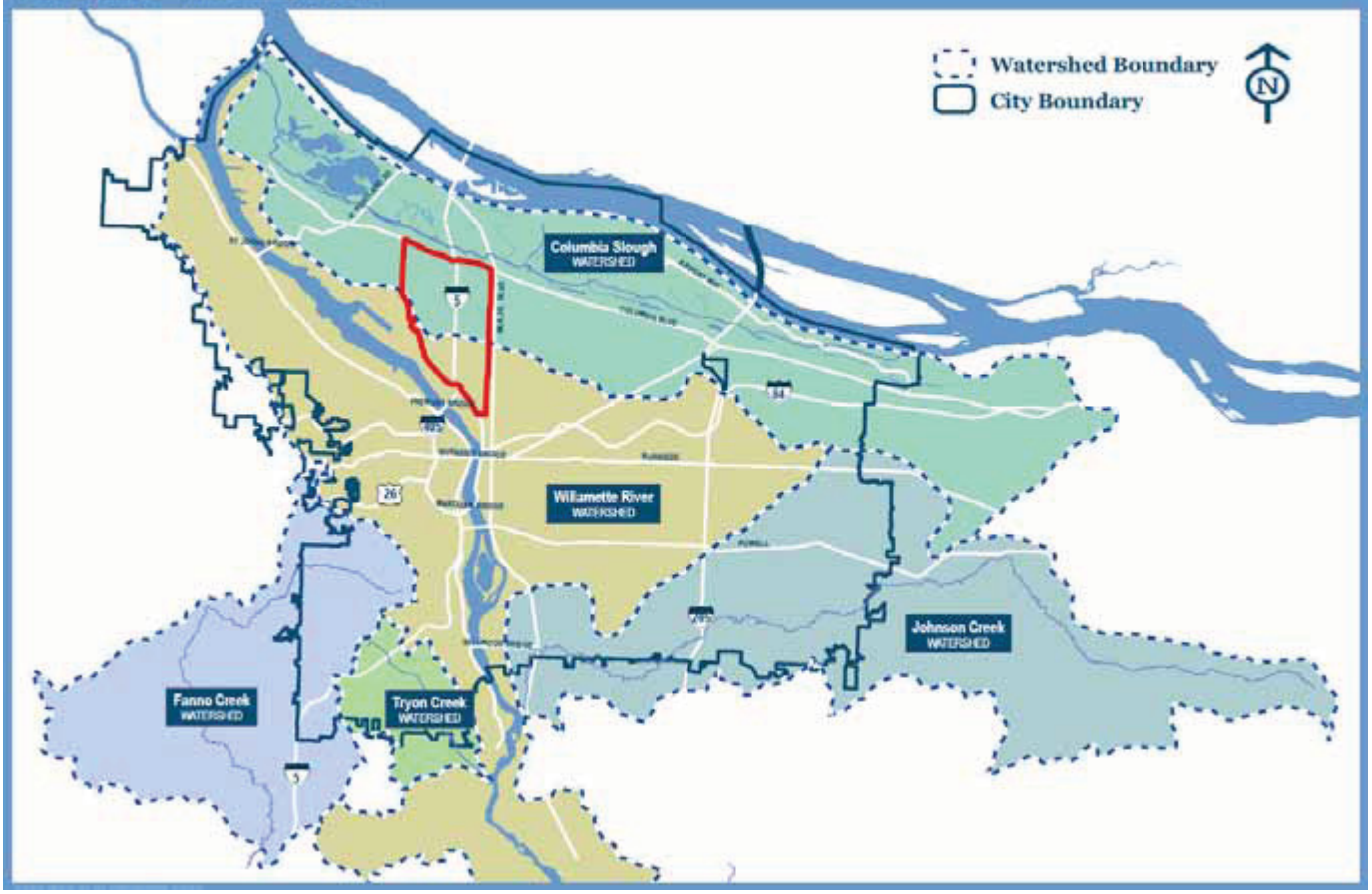
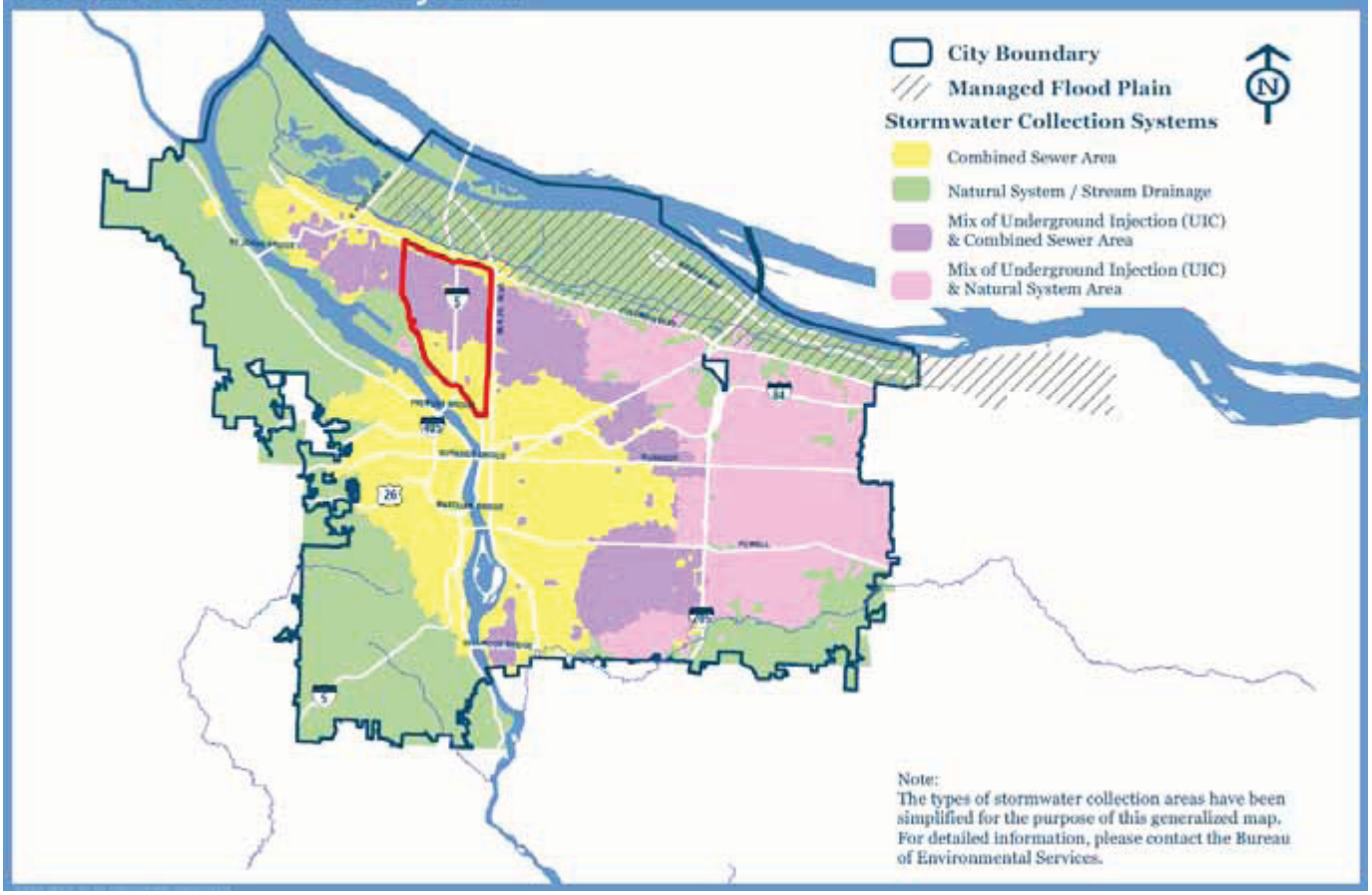
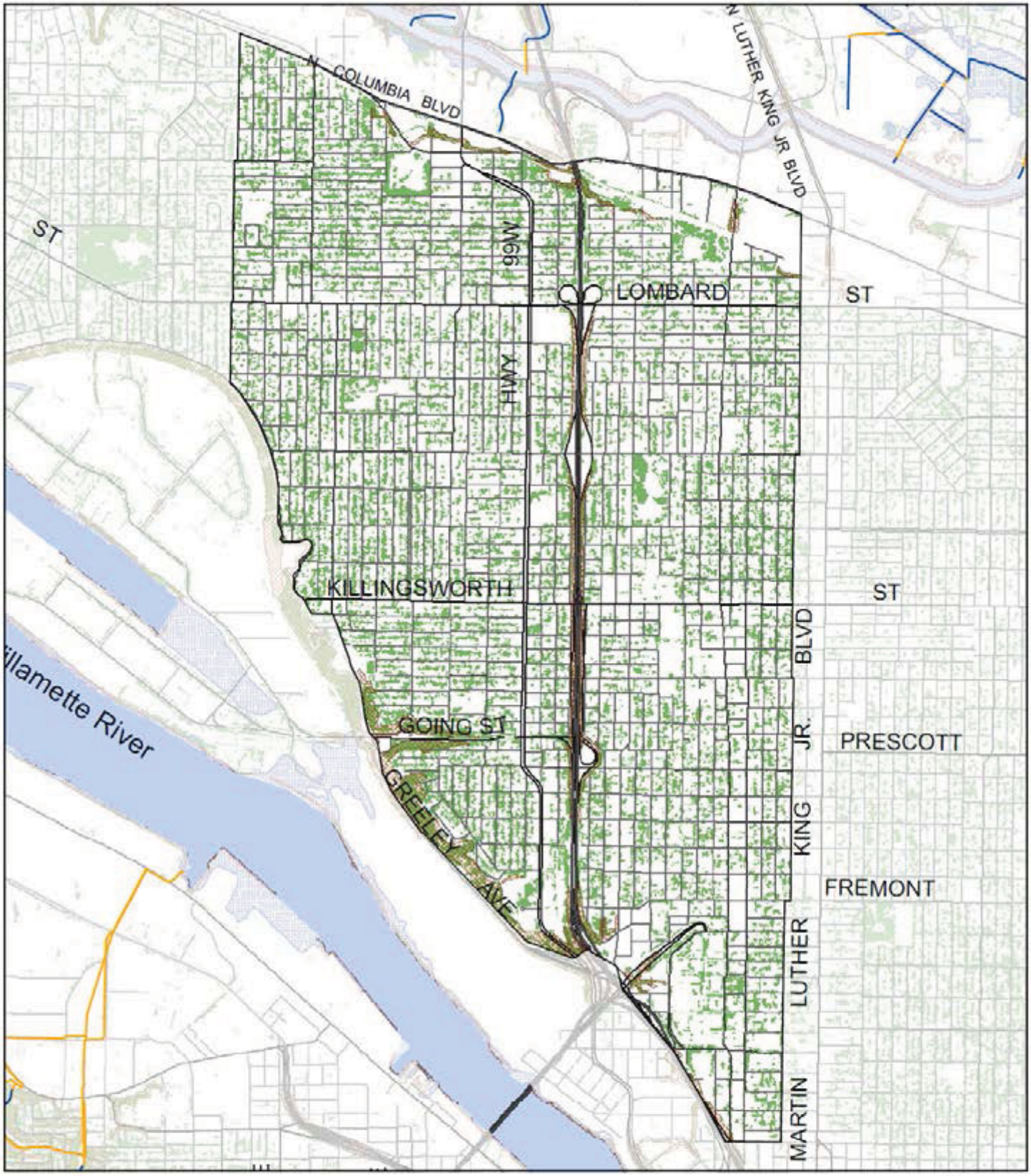
Portland Watersheds



Portland Stormwater System



Interstate Corridor Analysis Area



Watersheds and Natural Features

Slope Hazard
High Structure Vegetation
FEMA 100-year floodplain
Waterbodies
Open channel stream
Piped/culverted stream
City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

February 1, 2012

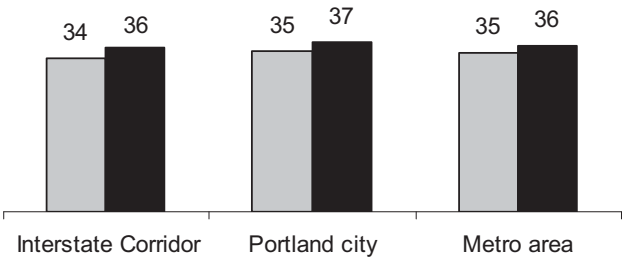
Interstate Corridor Analysis Area
Demographics (2000 – 2010)

ESRI Business Analyst and US Census 2010 (except as noted)

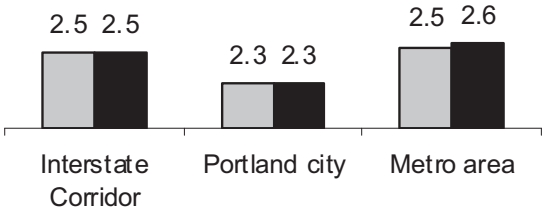
Population

	Interstate Corridor	Portland city	Metro area
2010	33,636	583,776	2,226,009
2000	32,695	529,121	1,927,881
% change	3%	10%	15%

Median Age

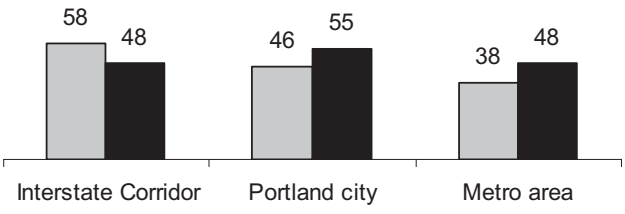


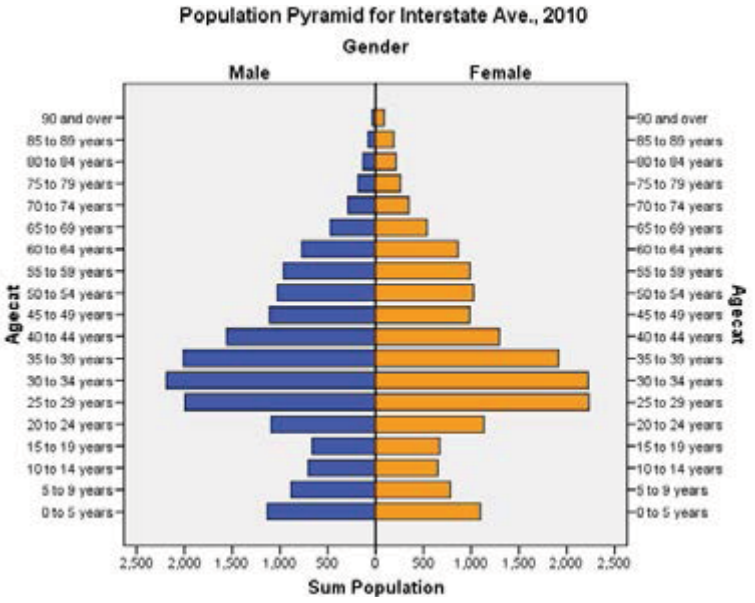
Average Household Size

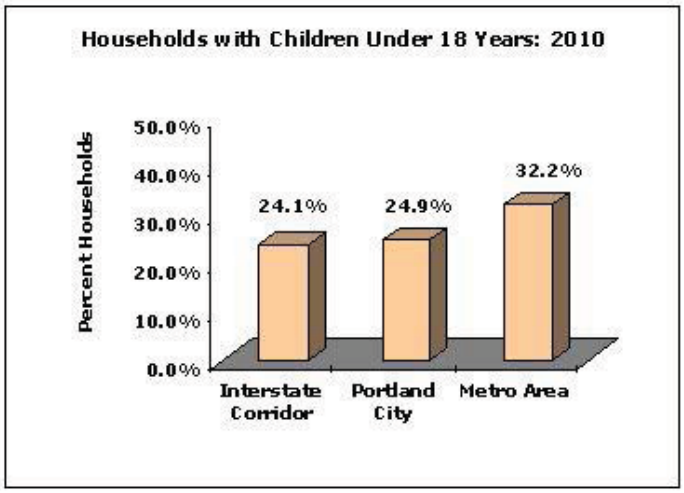


Diversity Index

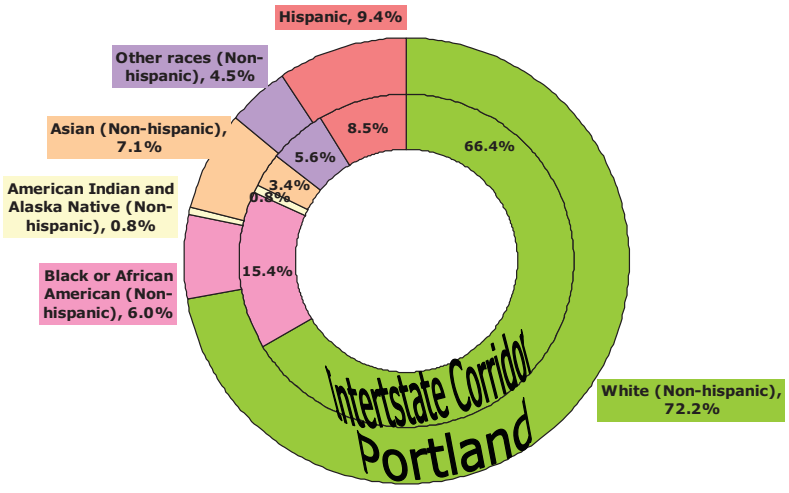
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



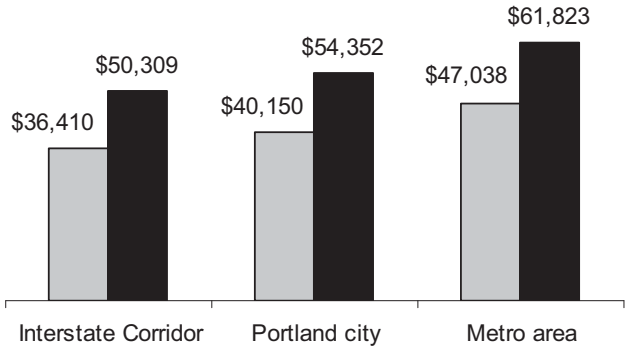


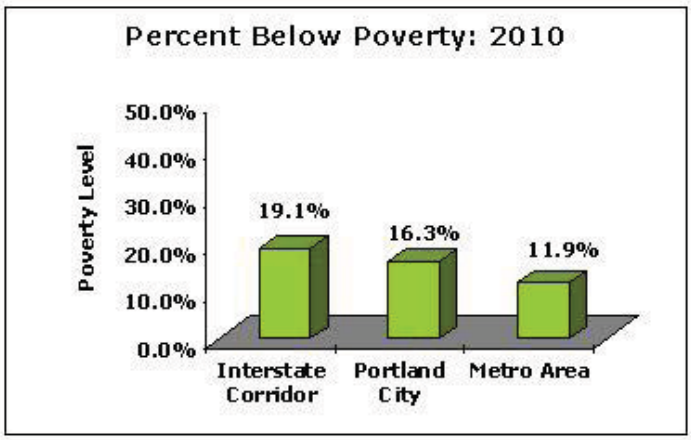


Racial and Ethnic Distribution in Portland vs. Interstate Corridor



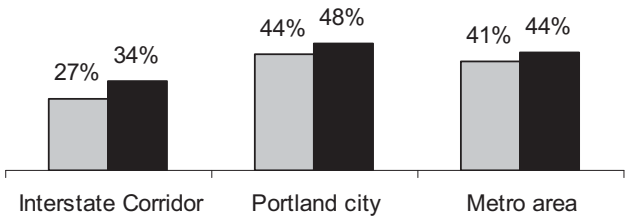
Median Household Income



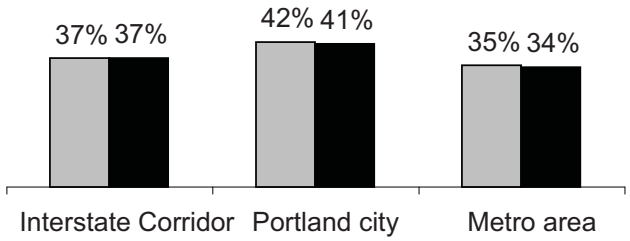


ACS 2006-2010

Percent College Graduates



Percent Renters of Occupied Housing Units



Median Home Value

	Interstate Corridor	Portland city	Metro area
2010	$197,371	$253,184	$273,500
2000	$127,233	$154,721	$168,347
% change	55.1%	63.6%	62.5%

Interstate Corridor Analysis Area
Commercial Real Estate Indicators

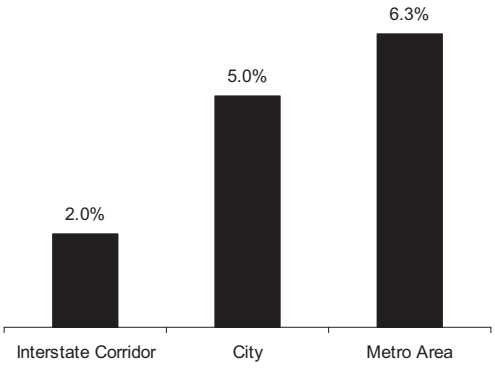
Retail and Commercial Real Estate data through 9-16-2010
Source: COSTAR

RETAIL

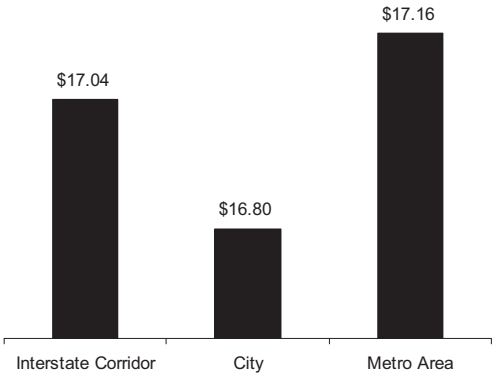
Square Feet

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

Retail Vacancy



Retail Rents

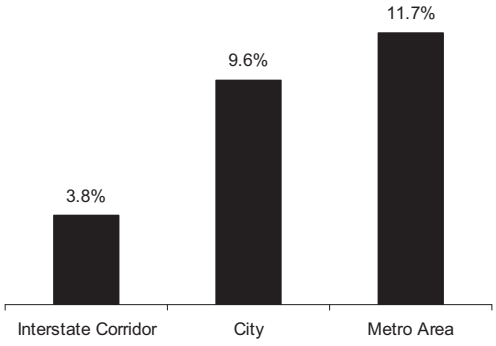


OFFICE SPACE

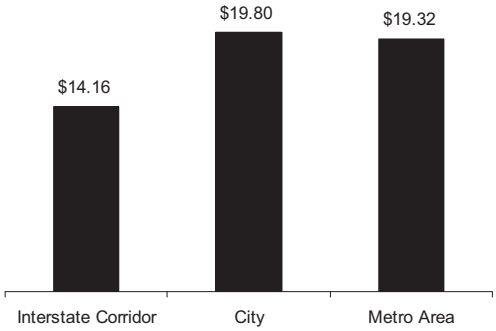
Square Feet

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

Office Vacancy



Office Rents

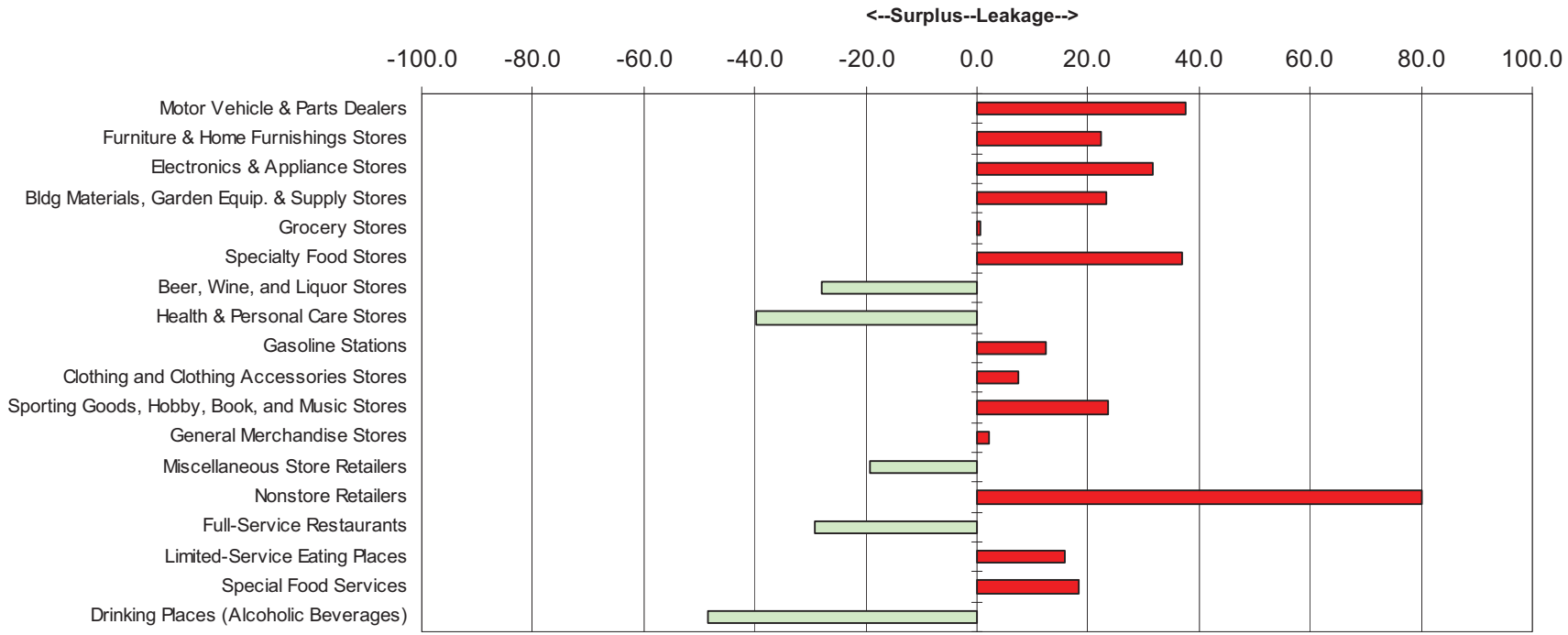


Interstate Corridor Analysis Area
Retail Market Profile

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 the difference between the potential spending in an area, based on population, 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." (Source: ESRI Business Analyst)



Interstate Corridor Analysis Area
Employment

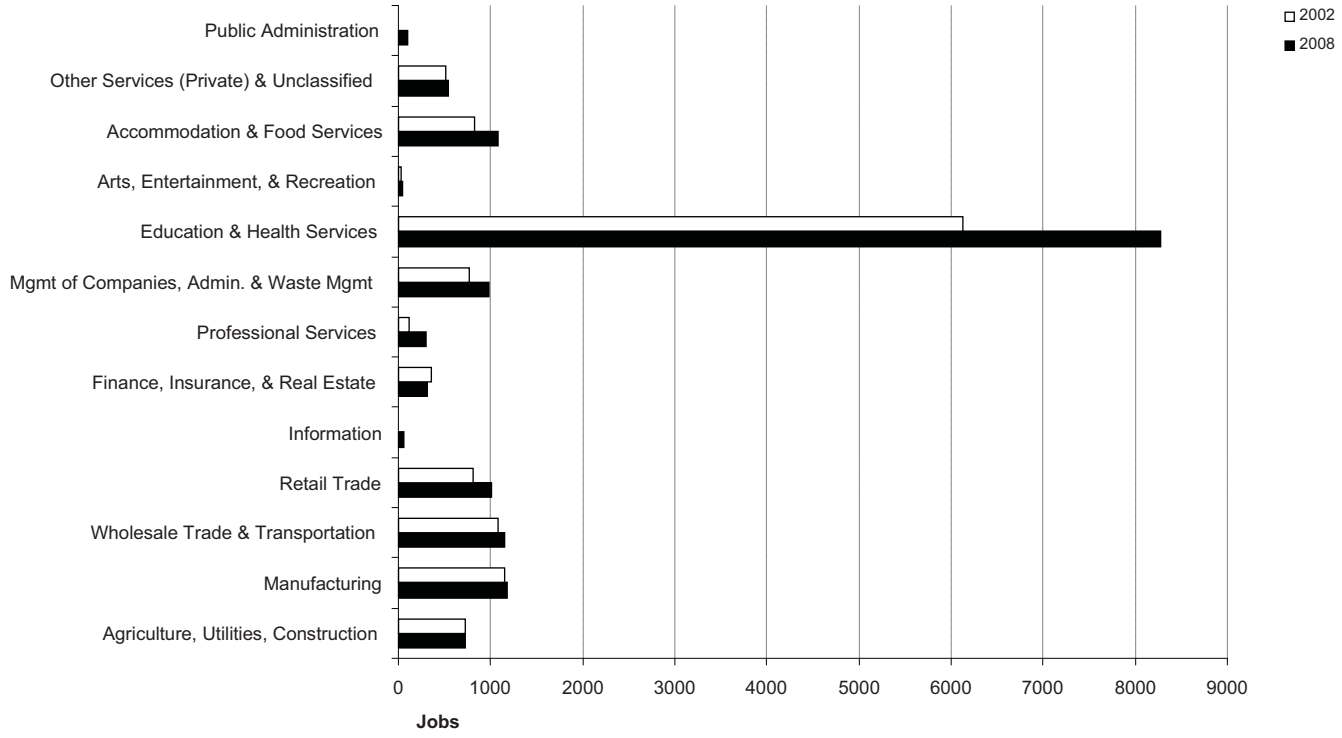
Quarterly Census of Employment and Wages data for 2002 & 2008
Source: Oregon Employment Department (OED)

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.

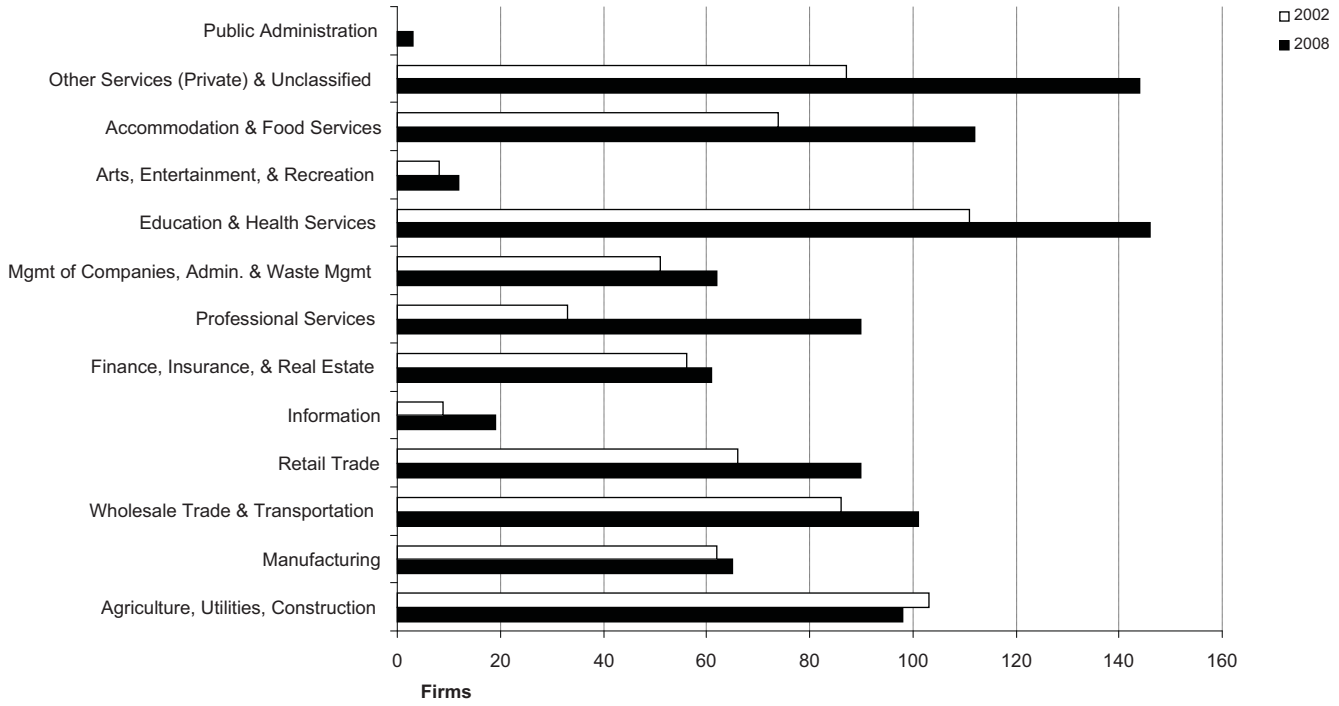
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices 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

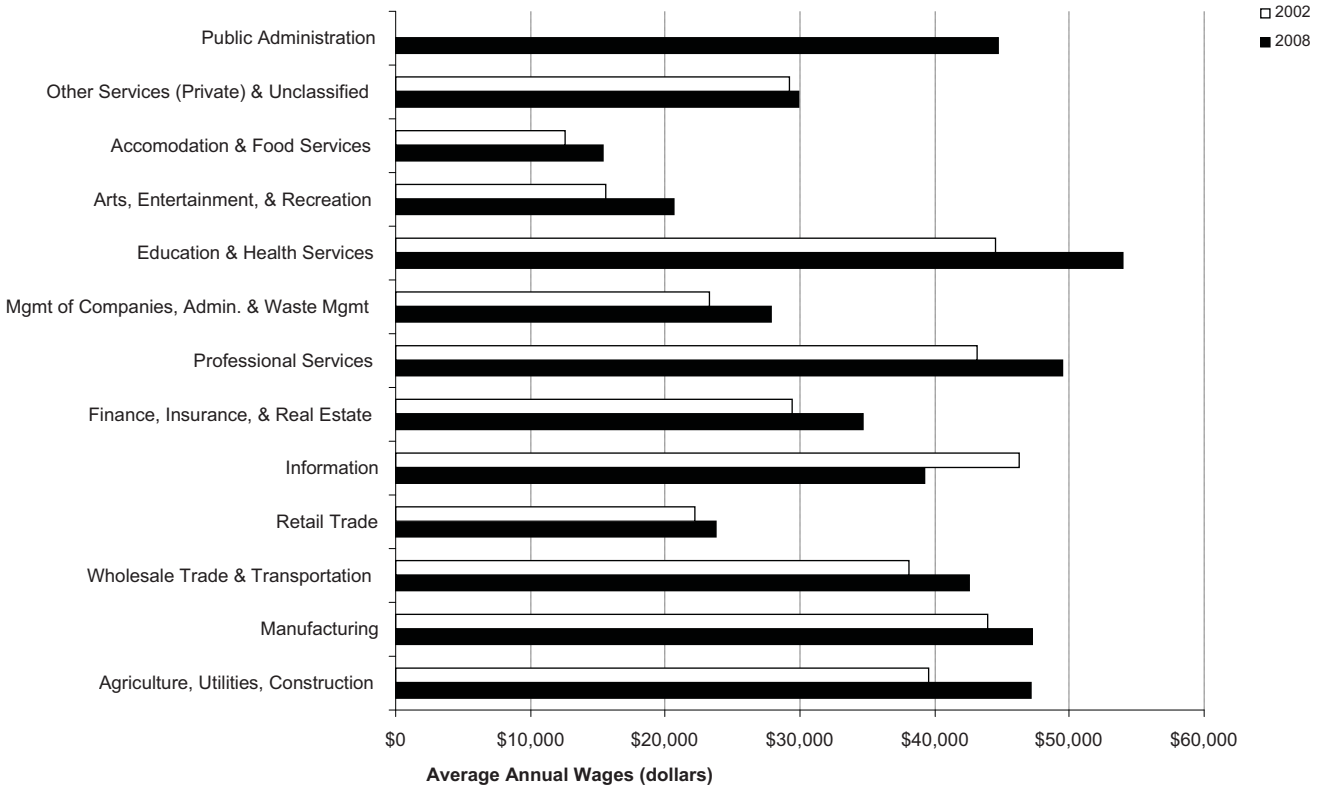
Total Jobs



Total Firms



Average Annual Wages

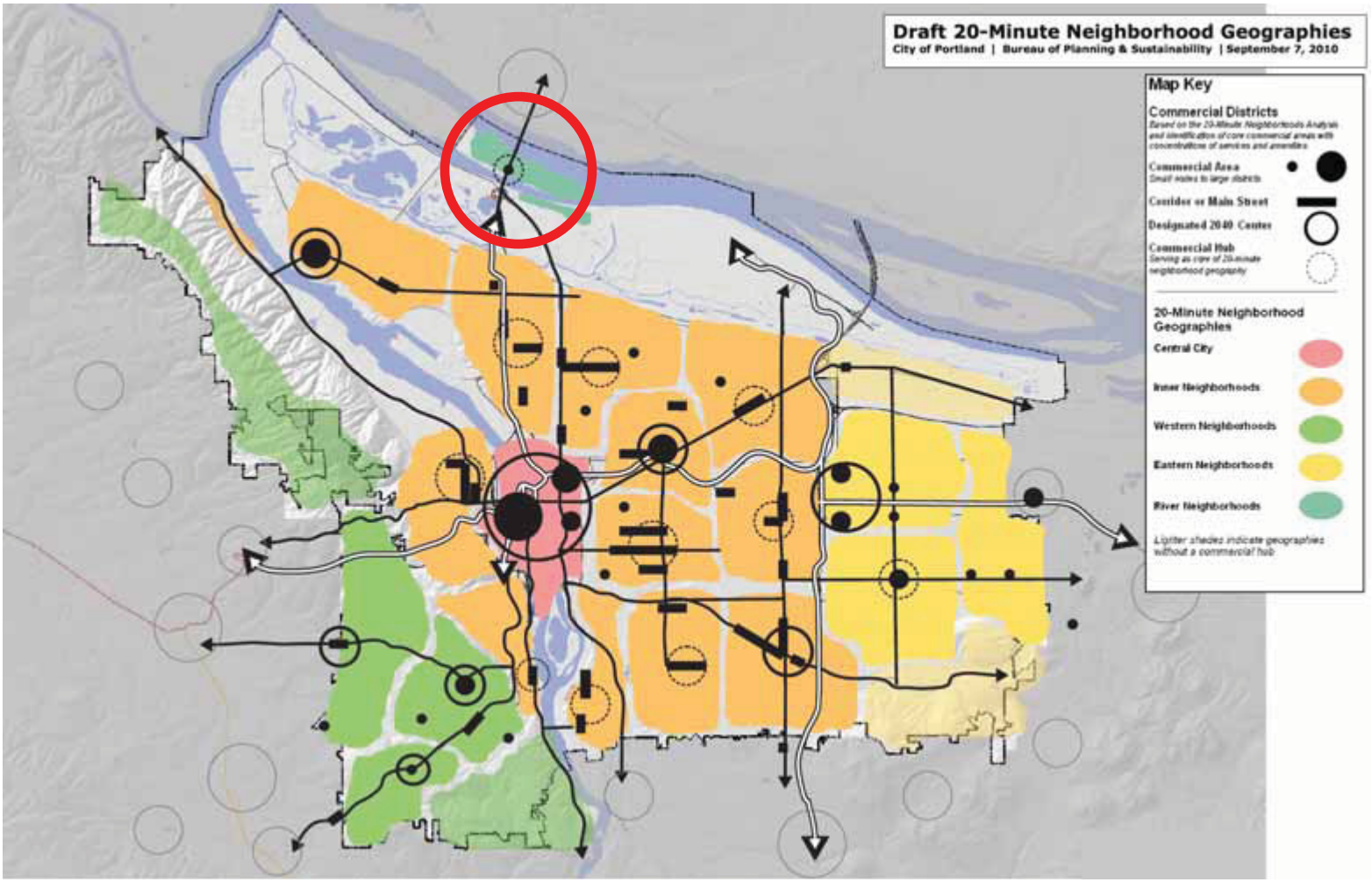


3

Hayden Island-Bridgeton Analysis Area

Including the Hayden Island, Bridgeton, and East Columbia neighborhoods

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

June 5, 2012

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 (2,200 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 (the latter located adjacent to the analysis area boundaries).

Grocery stores: 3 (1 store per 733 households)

Retail gap: $139 million surplus *(amount of estimated yearly retail sales that is beyond what the analysis area population be expected to support, indicating the regional market of the area's retail)*

Community Amenities

Proximity to Services and Amenities

Percentage of population:

Within 1/2 mile of a park*:	29%
Within 1/2 mile of a public elementary school:	0%
Within 3 miles of a full-service community center*:	34%
Within 1/2 mile of a full-service grocery store:	7%
Within 1/4 mile of a frequent service transit stop:	3%

**Parks Bureau service standard*

Community Centers: None

Libraries: None

Parks and Open Spaces: 30 acres - including the Columbia Childrens Arboretum. Located nearby are East Delta Park, 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 (1 planned for Hayden Island, also 2 existing light rail stations located to the west of the analysis area [Expo Center, Delta Park/Vanport])

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

Neighborhood and Business Associations

Neighborhood Associations: Hayden Island, Bridgeton, and East Columbia

Business Associations: Columbia Corridor Association

Urban Form Characteristics

The area is distinctive in its river setting. Residential areas include a mix of riverfront communities, including manufactured home complexes, clusters of waterfront apartment or condominium buildings, and house boat communities. The area includes the large auto-oriented Jantzen Beach shopping area. The I-5 Freeway goes through the center of the area and is the only vehicular, pedestrian or bicycle access to and from Hayden Island. The Bridgeton area includes high-density residential development and an urban block structure along the Columbia River, in distinction from the predominant employment and open space lands of the rest of the Columbia Slough.

Access issues. Much of the area lacks street and sidewalk connectivity. The area is rich in commercial services, but commercial areas are not integrated with residential areas, limiting walkable accessibility. Limited access to transit and community services, with no nearby schools.

2040 Growth Concept: Designated Mixed-Use Areas

The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.

Mixed-Use Centers:	0
Main Streets:	0
Station Communities:	1 planned (Hayden Island)

Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	238	20%	91
Multi-Family Residential:	121	10%	14
Commercial/Mixed-Use:	325	29%	139
Employment:	3	.3%	0
Industrial:	296	25%	25
Open Space:	183	16%	NA

**From Buildable Lands Inventory (vacant or underutilized)*

Anticipated Growth by 2035

(From Buildable Lands Inventory allocations, based on development capacity and trend information)

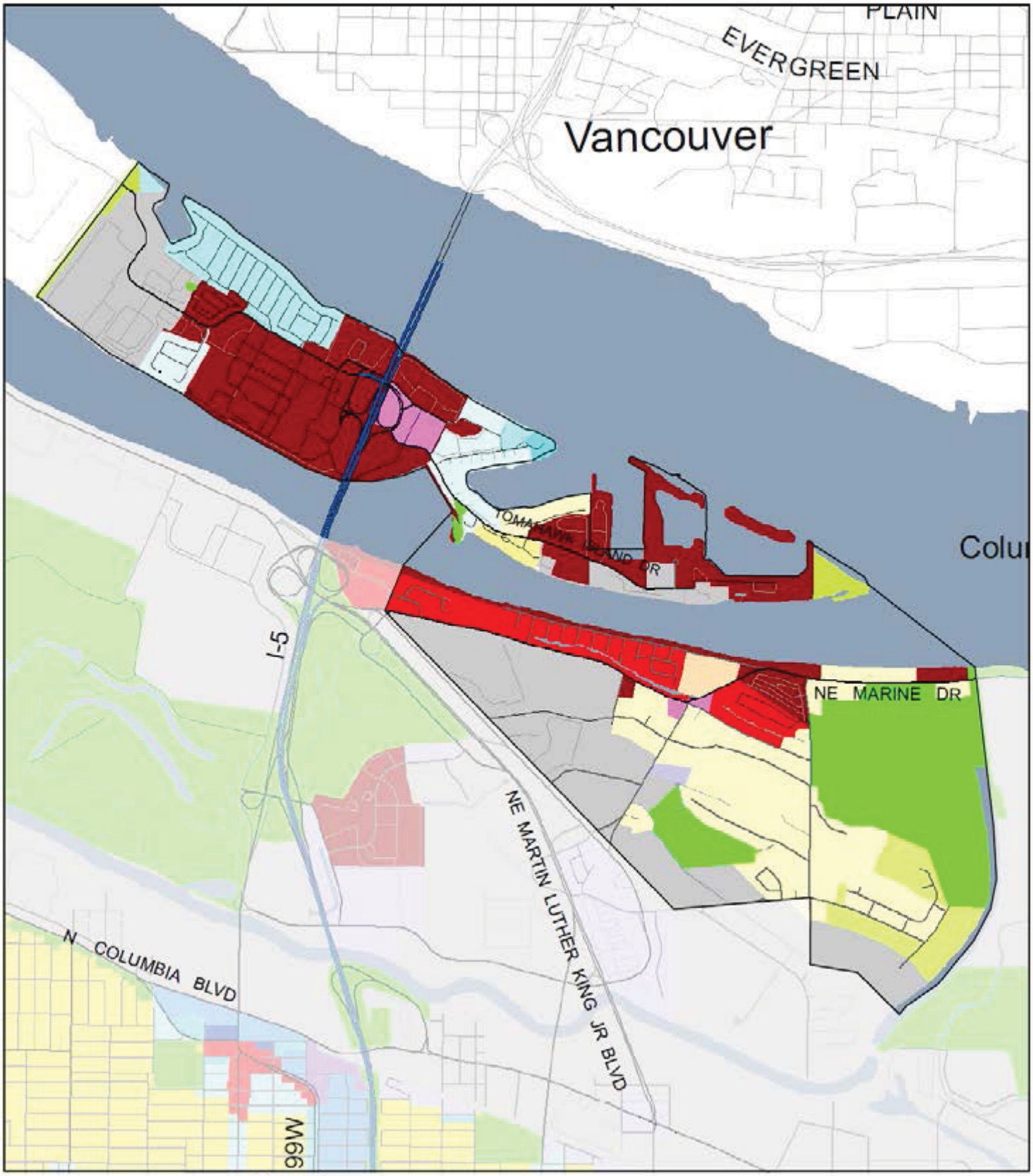
2010 Housing Units (Census):	2,501
2035 Housing Units:	4,900

Comprehensive Plan Designations Map *(next page)*

Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

Hayden Island-Bridgeton Analysis Area



Comprehensive Plan Designations

February 1, 2012

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Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	

NORTH

0 1,000 2,000 3,000 Feet

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City of Portland, Oregon
Sam Adams, Mayor · Susan Anderson, Director

Hayden Island-Bridgeton Analysis Area

Services and Amenities

August 9, 2011
commercial data: InfoUSA 2008

Type 1 Commercial
Type 2 Commercial
Commercial Cluster
Fitness Centers
Grocery Stores
Places of Worship
Libraries
Farmers Markets
Community Gardens
Community Centers
County Health Clinic
County Aging Services
Preschools
Daycare Centers
Public HS
Public K-8
Private Schools

NORTH

0 1,000 2,000 3,000 Feet

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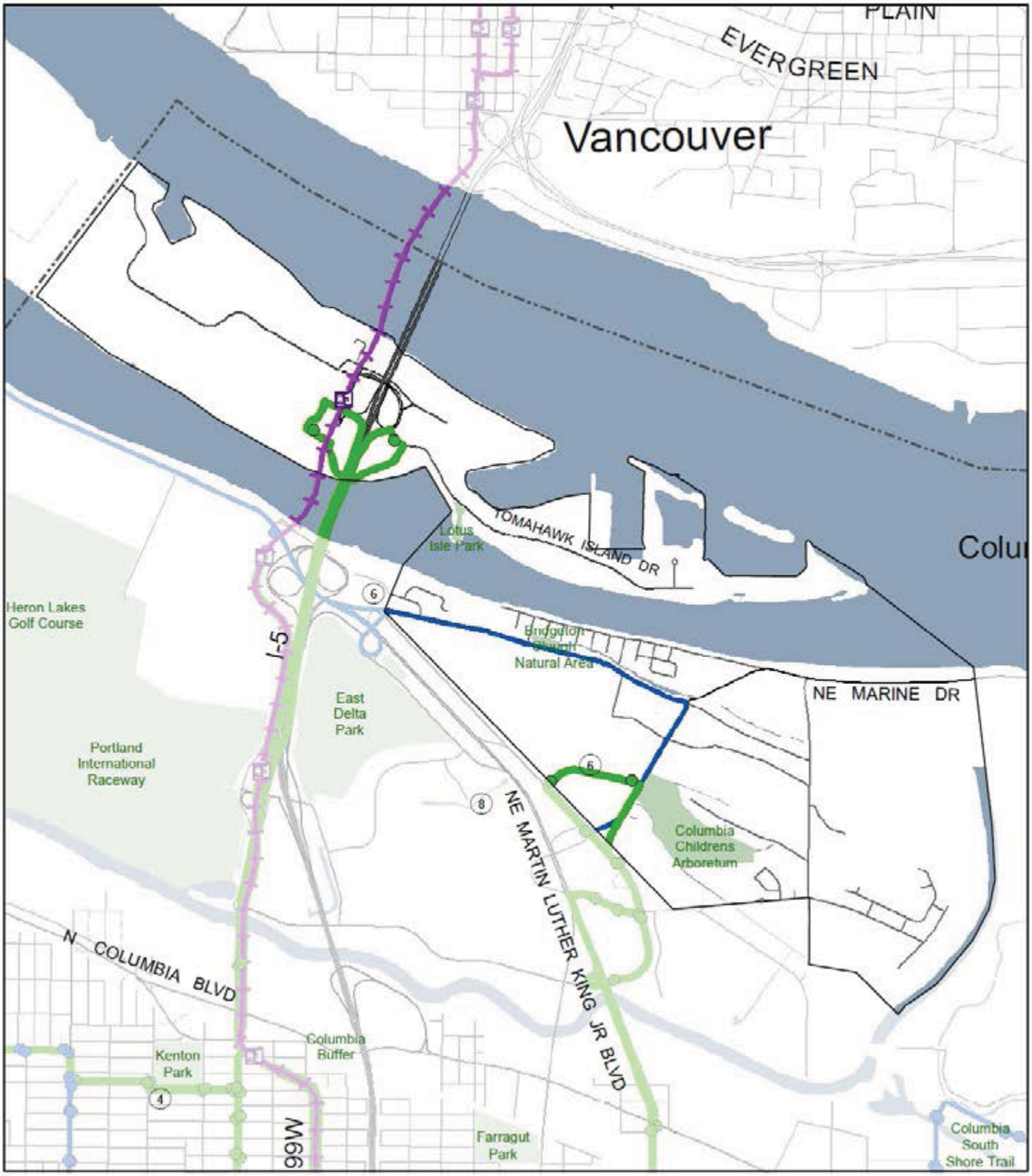
City of Portland, Oregon
Sam Adams, Mayor · Susan Anderson, Director

Hayden Island-Bridgeton Analysis Area



Transit Infrastructure

Light Rail Stops
- MAX
- Street Car
- MAX
- Streetcar

Bus Stops
- Frequent Stops
- Standard Stops
- Rush Hour Stops
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary

NORTH

0 1,000 2,000 3,000 Feet

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February 1, 2012

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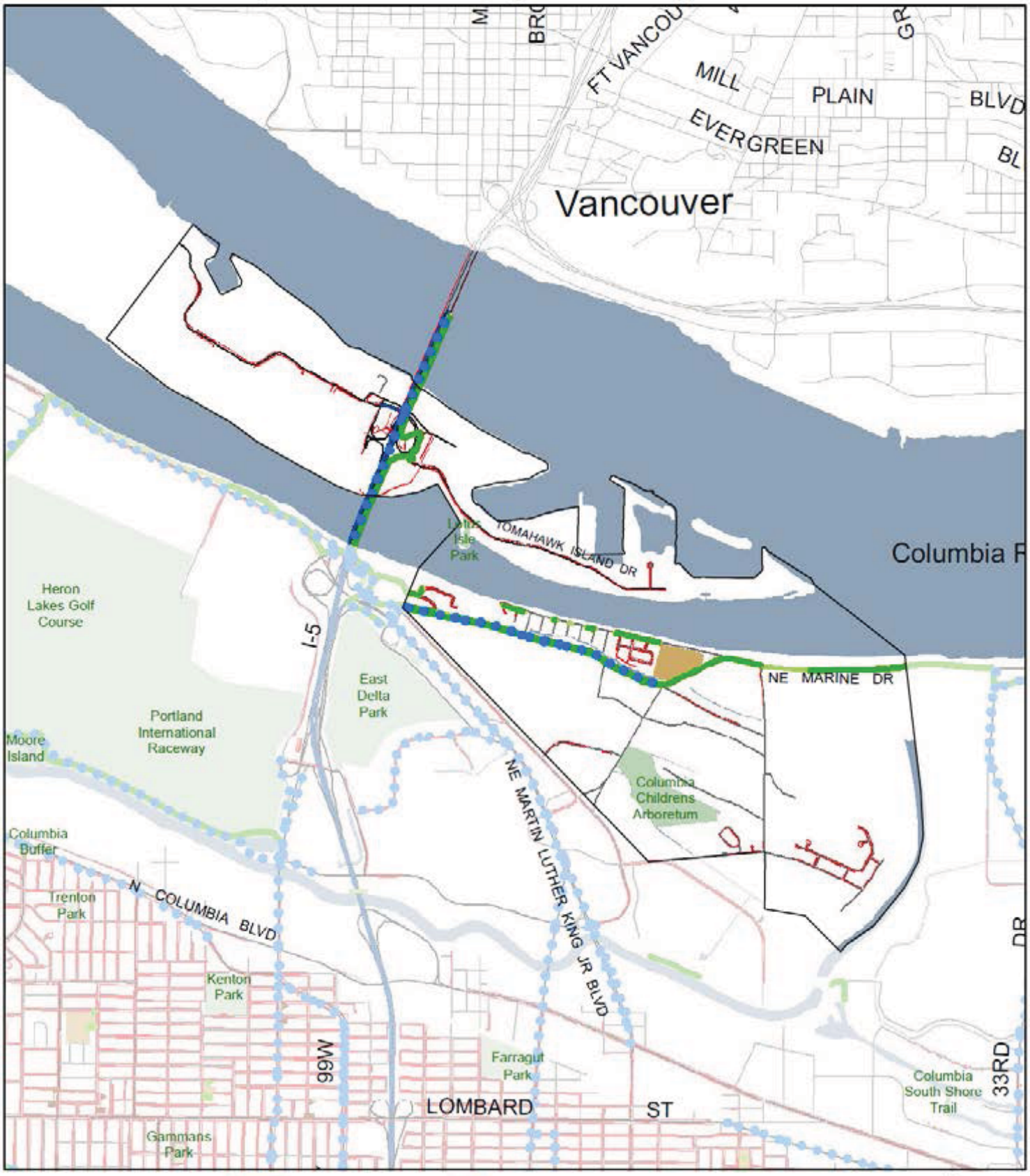
Hayden Island-Bridgeton Analysis Area



Sidewalks and Bicycle Infrastructure

August 9, 2011

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Sidewalks
Existing Bike Facility
regional trails outside Portland (existing)
regional trails in Portland
Public HS
Public K-8
Private Schools

NORTH

0 1,000 2,000 3,000 Feet

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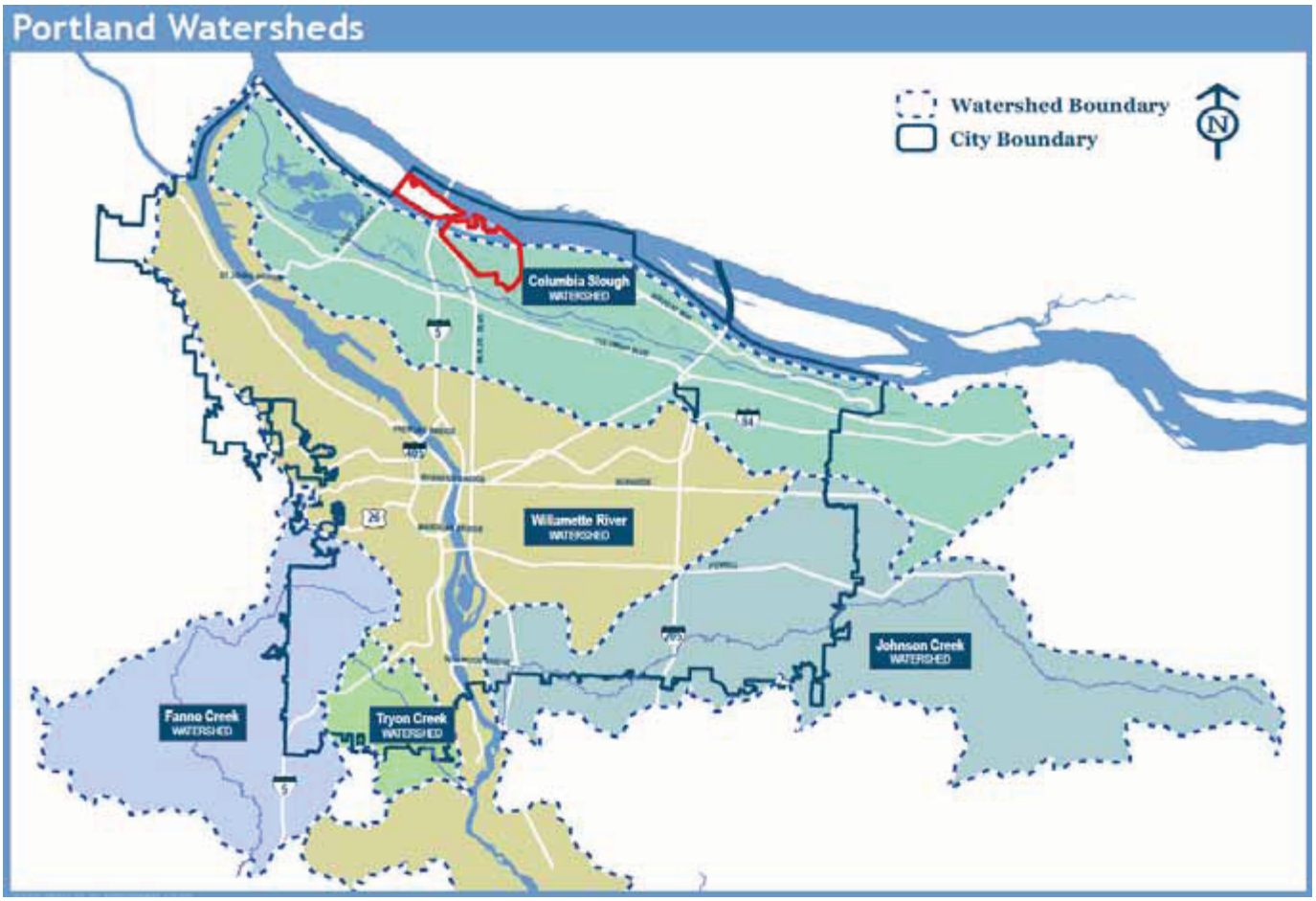
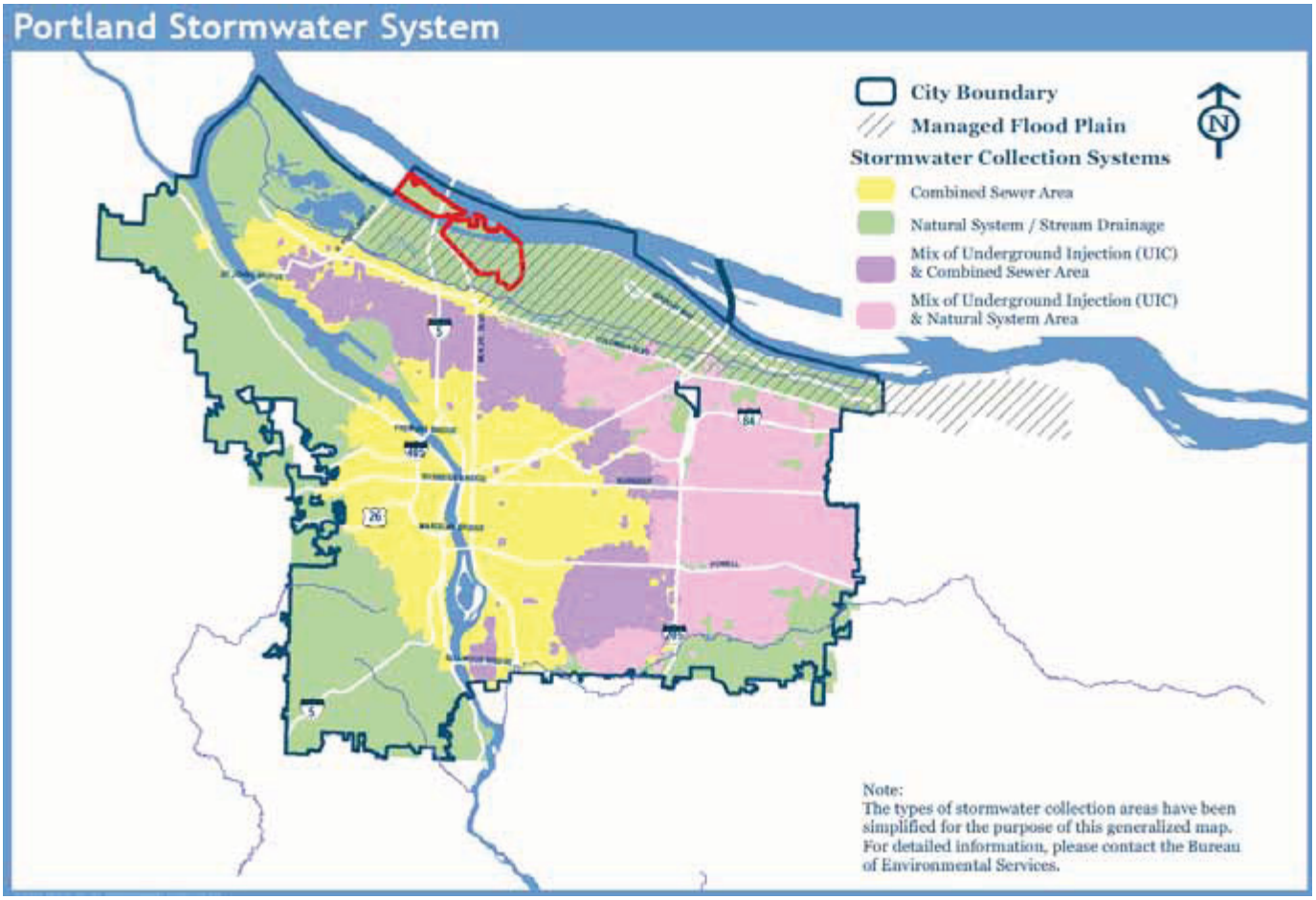
City of Portland, Oregon
Sam Adams, Mayor · Susan Anderson, Director

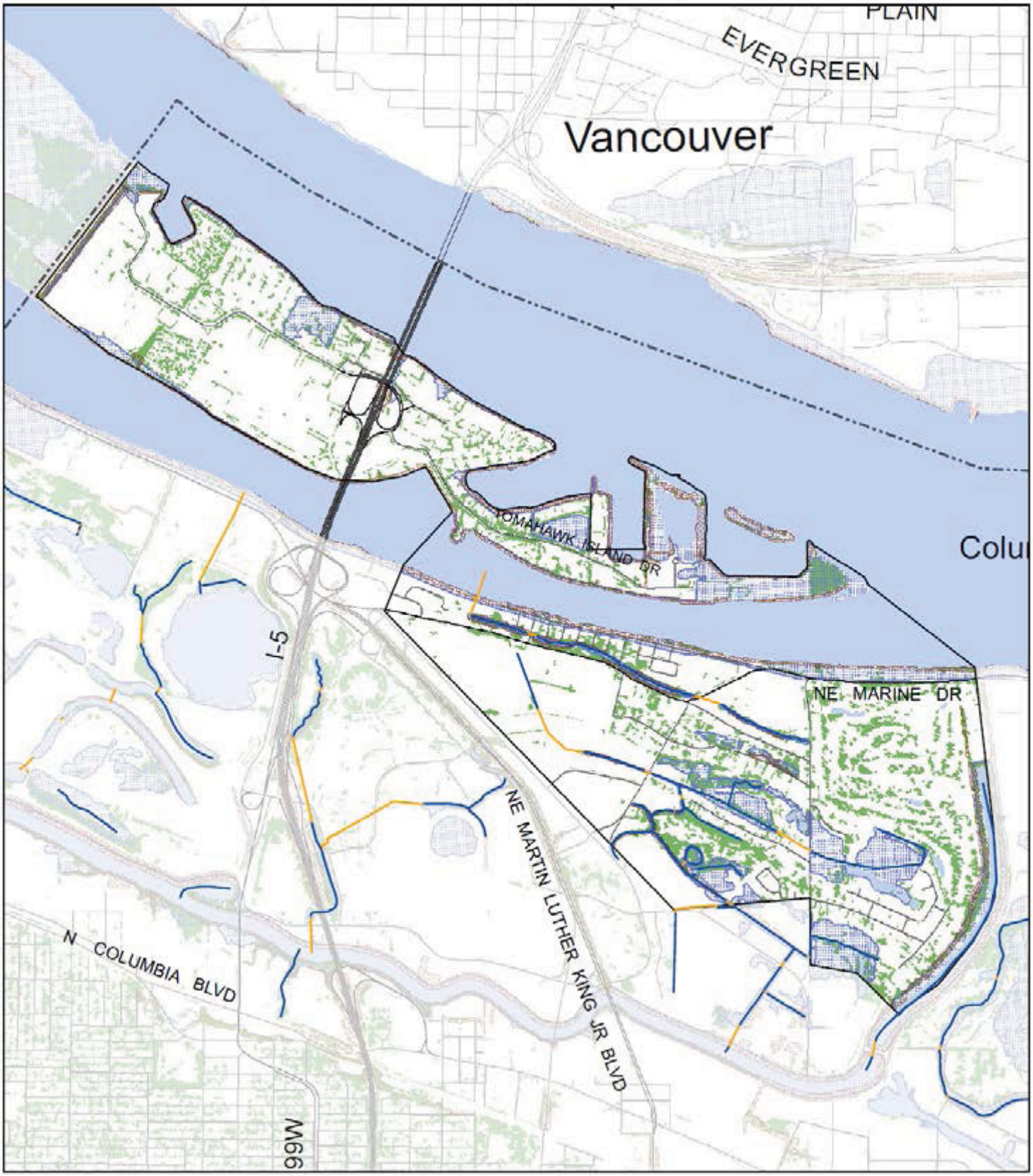
Portland Watersheds



Portland Stormwater System



Hayden Island-Bridgeton Analysis Area



Watersheds and Natural Features

Slope Hazard
High Structure Vegetation
FEMA 100-year floodplain
Waterbodies
Open channel stream
Piped/culverted stream
City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

August 9, 2011

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Hayden Island-Bridgeton Analysis Area

Demographics (2000 – 2010)

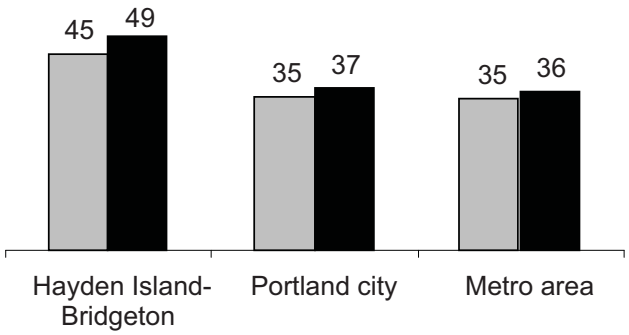
ESRI Business Analyst and US Census 2010 (except as noted)

Population

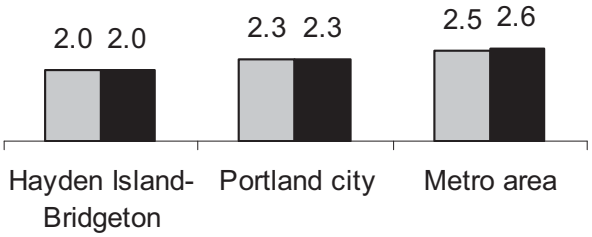
	Hayden Island-Bridgeton	Portland city	Metro area
2010	4,223	583,776	2,226,009
2000	2,912	529,121	1,927,881
% change	45%	10%	15%

2000 2010

Median Age

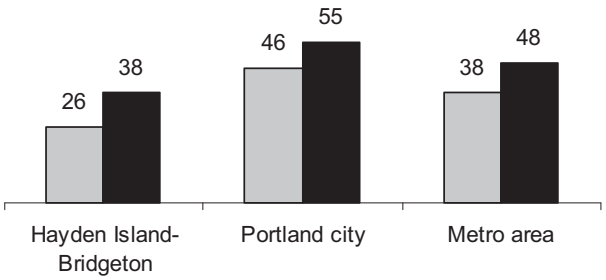


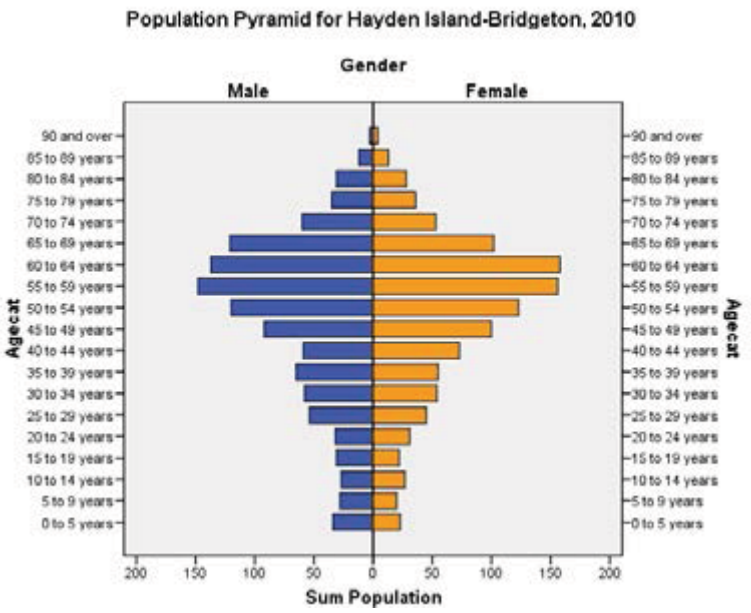
Average Household Size

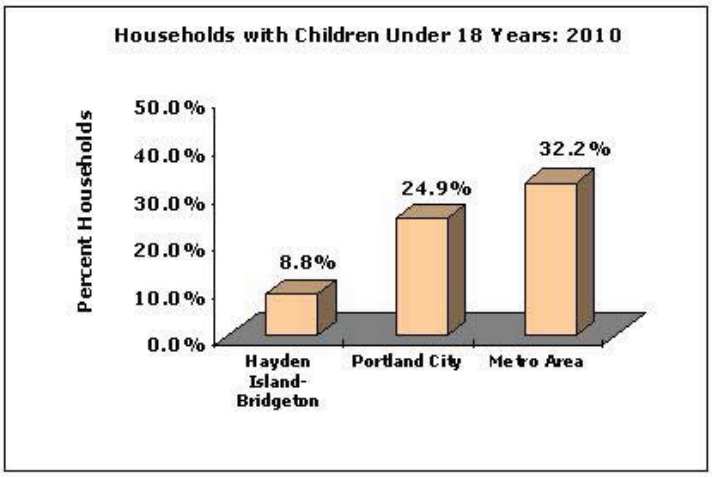


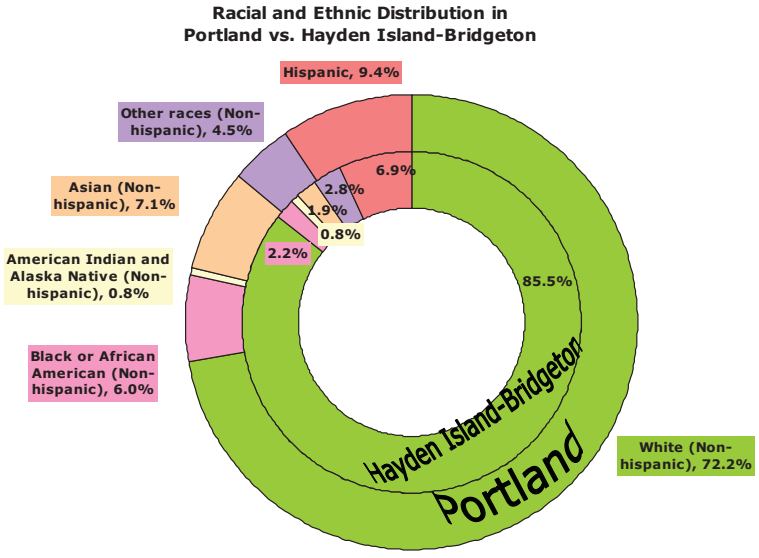
Diversity Index

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

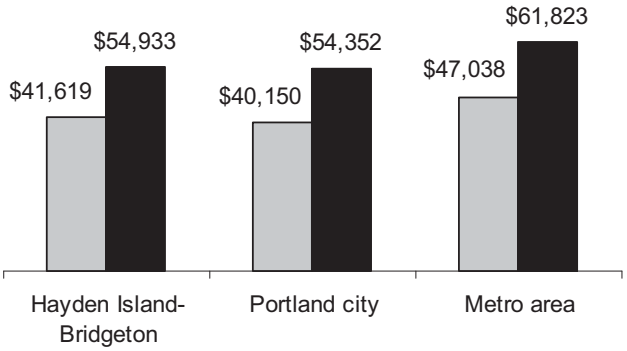


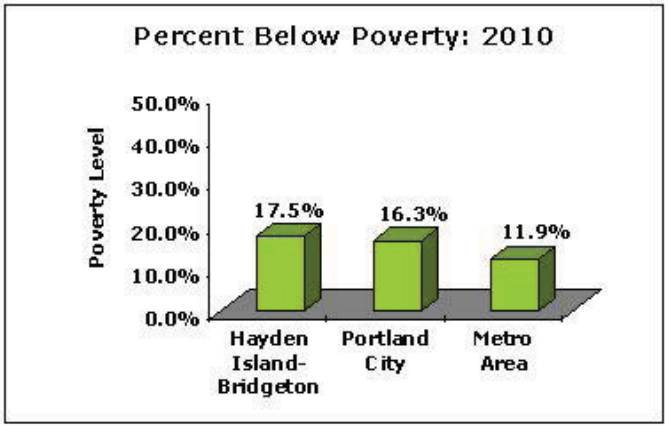






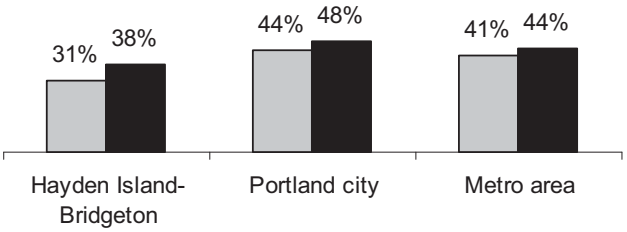
Median Household Income



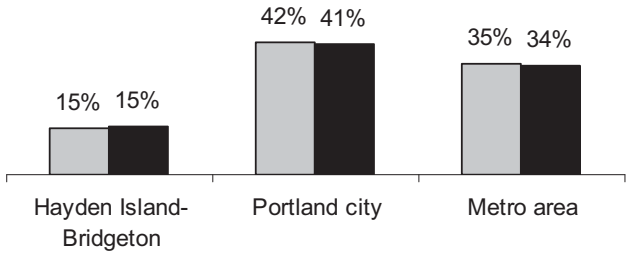


ACS 2006-2010

Percent College Graduates



Percent Renters of Occupied Housing Units



Median Home Value

	Hayden Island-	Portland city	Metro area
2010	$79,875	$253,184	$273,500
2000	$61,081	$154,721	$168,347
% change	30.8%	63.6%	62.5%

Hayden Island-Bridgeton Analysis Area
Commercial Real Estate Indicators

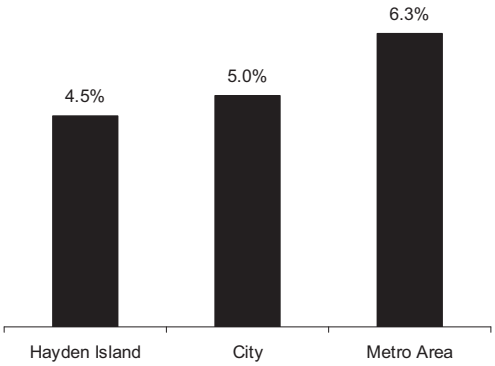
Retail and Commercial Real Estate data through 9-16-2010
Source: COSTAR

RETAIL

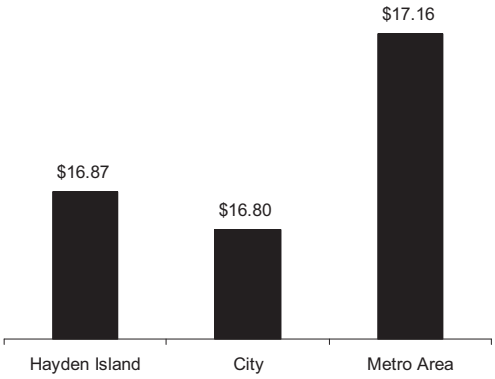
Square Feet

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

Retail Vacancy



Retail Rents

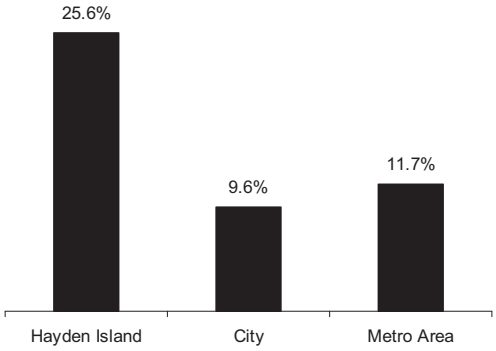


OFFICE SPACE

Square Feet

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

Office Vacancy



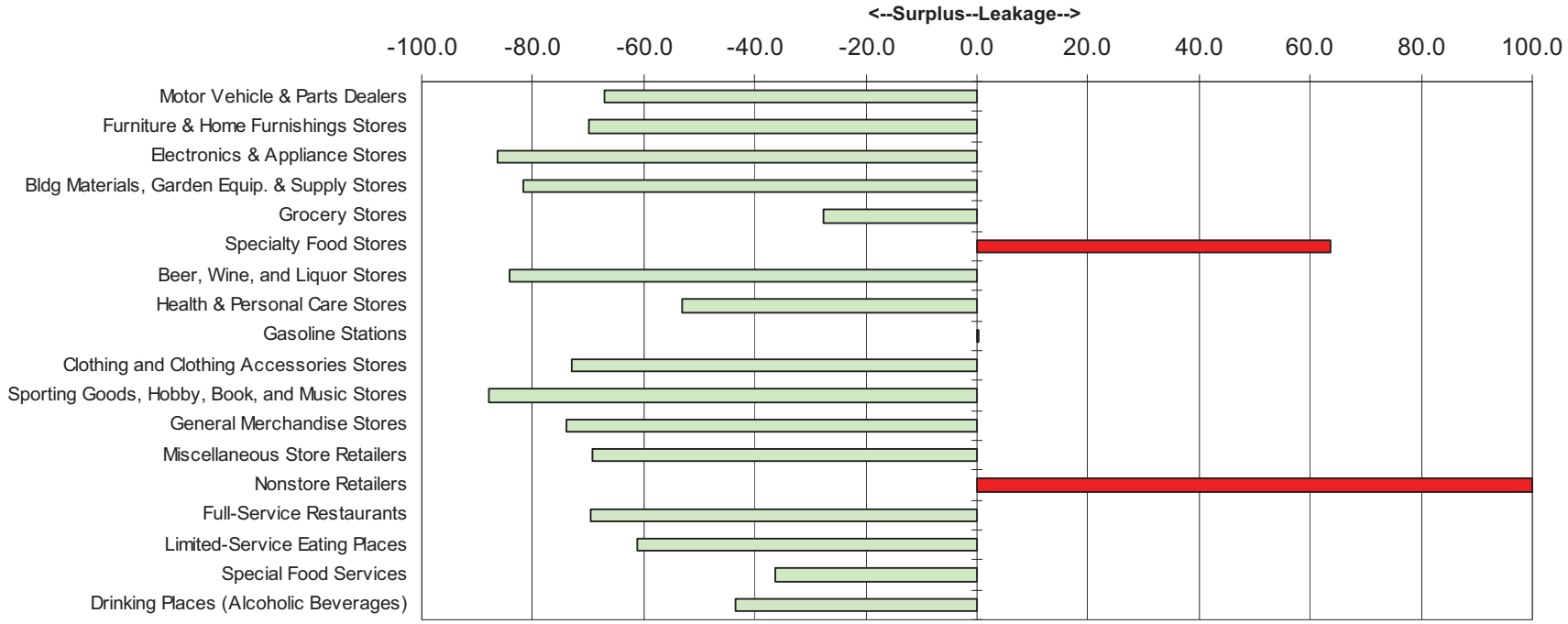
Office Rents

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 the difference between the potential spending in an area, based on population, 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." (Source: ESRI Business Analyst)



Hayden Island-Bridgeton Analysis Area
Employment

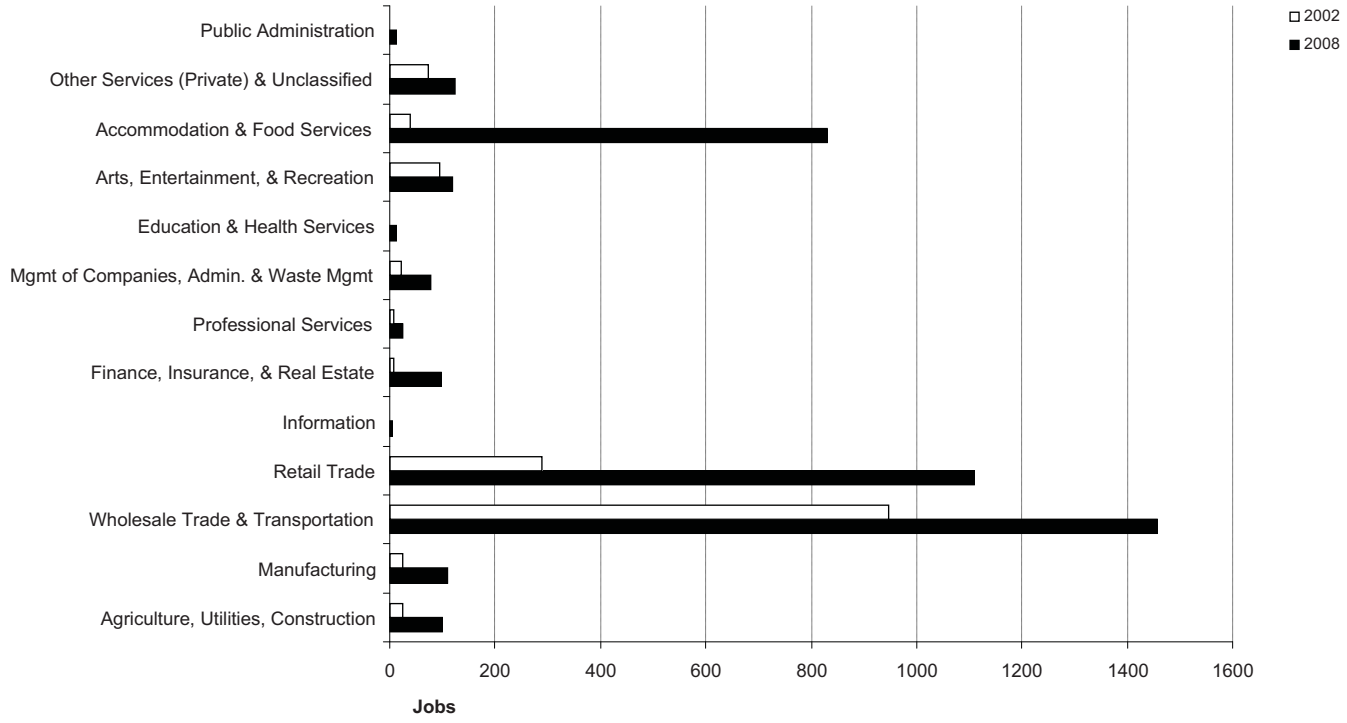
Quarterly Census of Employment and Wages data for 2002 & 2008
Source: Oregon Employment Department (OED)

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.

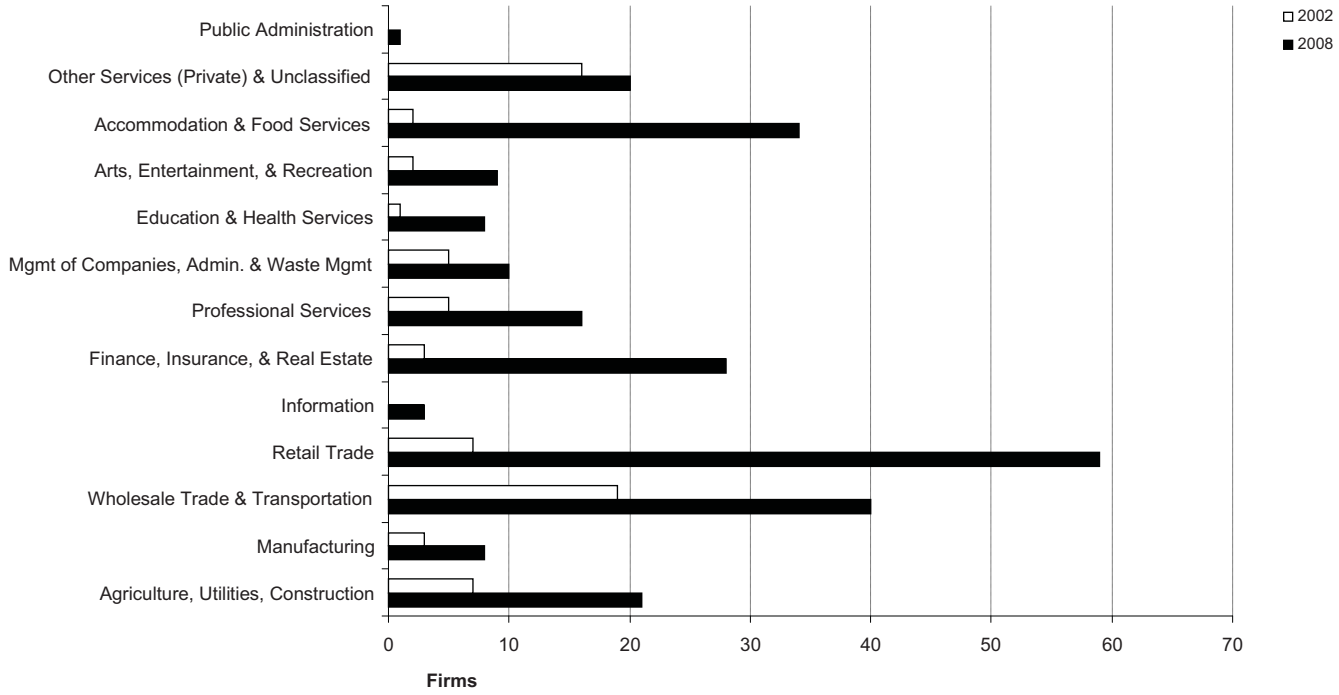
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices 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

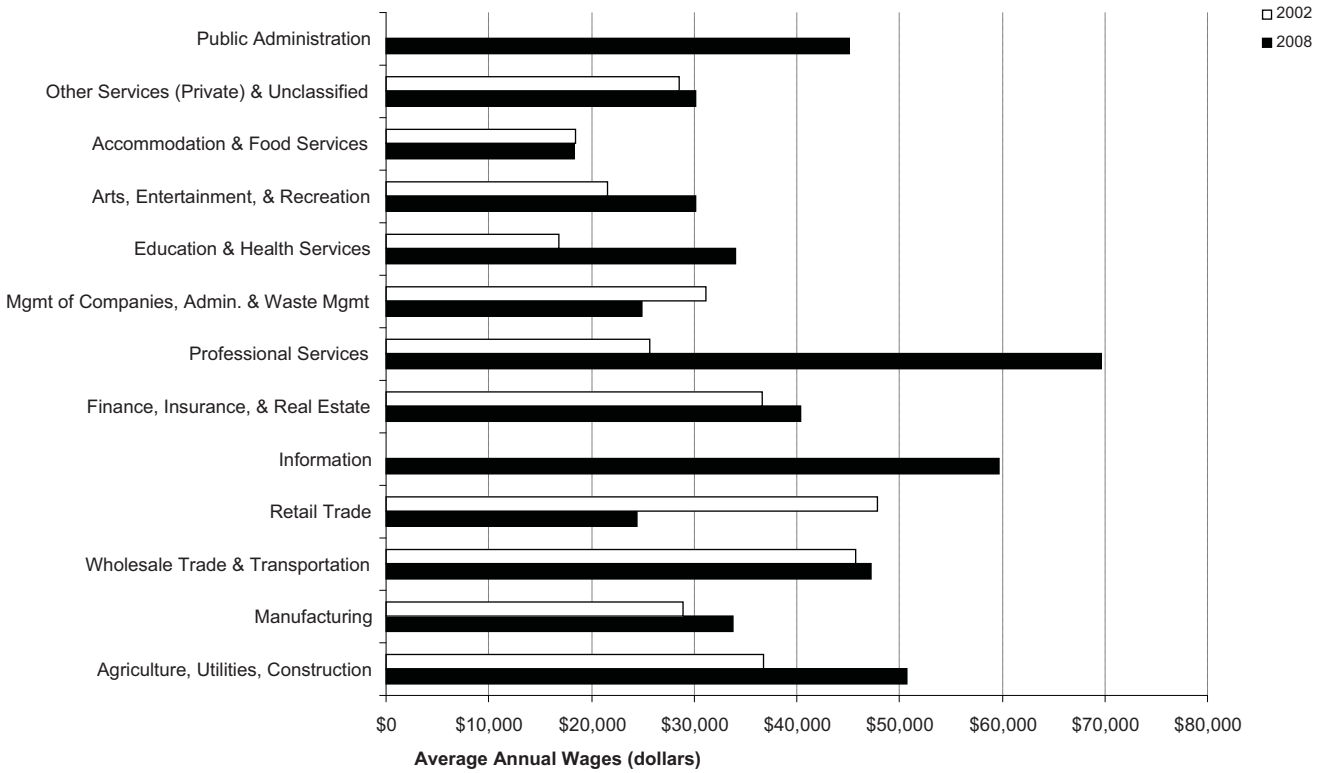
Total Jobs



Total Firms



Average Annual Wages



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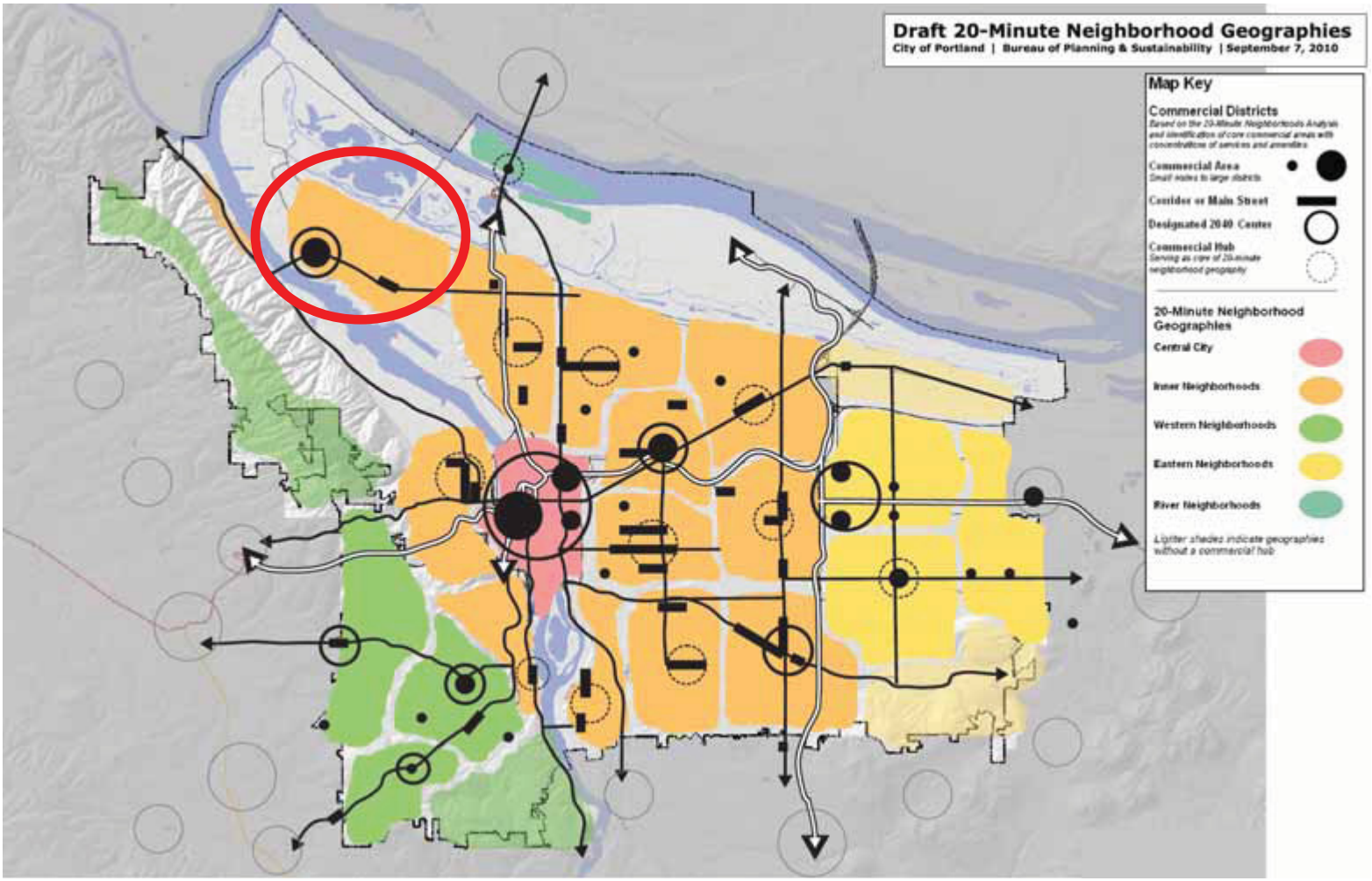
St. Johns Analysis Area

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 June 5, 2012

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: 32,500 people (12,000 households)
Land Area: 4.3 square miles (7,600 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 (1 store per 3,000 households)

Retail gap: $95 million gap *(amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area)*

Community Amenities

Proximity to Services and Amenities

Percentage of population:	
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*:	100%
Within 1/2 mile of a full-service grocery store:	14%
Within 1/4 mile of a frequent service transit stop:	65%

**Parks Bureau service standard*

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)

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

Urban Form Characteristics

Much of this area is composed of a varied grid of residential blocks, originally developed during the Streetcar Era, with a continuous system of sidewalks. Lombard Street is the area's primary commercial corridor and includes a mix of traditional main street areas with street-fronting buildings and more auto-oriented development with surface parking lots. Much of the area is located on a bluff above the Willamette riverfront, and is bounded to the west and north by industrial areas and the Columbia Slough.

Access issues. Good street and sidewalk connectivity, but the North Portland railway cut serves as a barrier. Relatively good access to transit, and areas around the St. Johns town center have good access to commercial and community services. Access to commercial services is not as good east of the railway cut (including areas with concentrations of multifamily development around New Columbia).

2040 Growth Concept: Designated Mixed-Use Areas

The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.

St. Johns Town Center:	294 acres
Main Streets:	1.5 miles (Lombard)
Station Communities:	0

Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,136	58%	138
Multi-Family Residential:	358	18%	171
Commercial/Mixed-Use:	133	7%	41
Employment:	61	3%	20
Industrial:	56	3%	40
Open Space:	220	11%	NA

**From Buildable Lands Inventory (vacant or underutilized)*

Anticipated Growth by 2035

(From Buildable Lands Inventory allocations, based on development capacity and trend information)

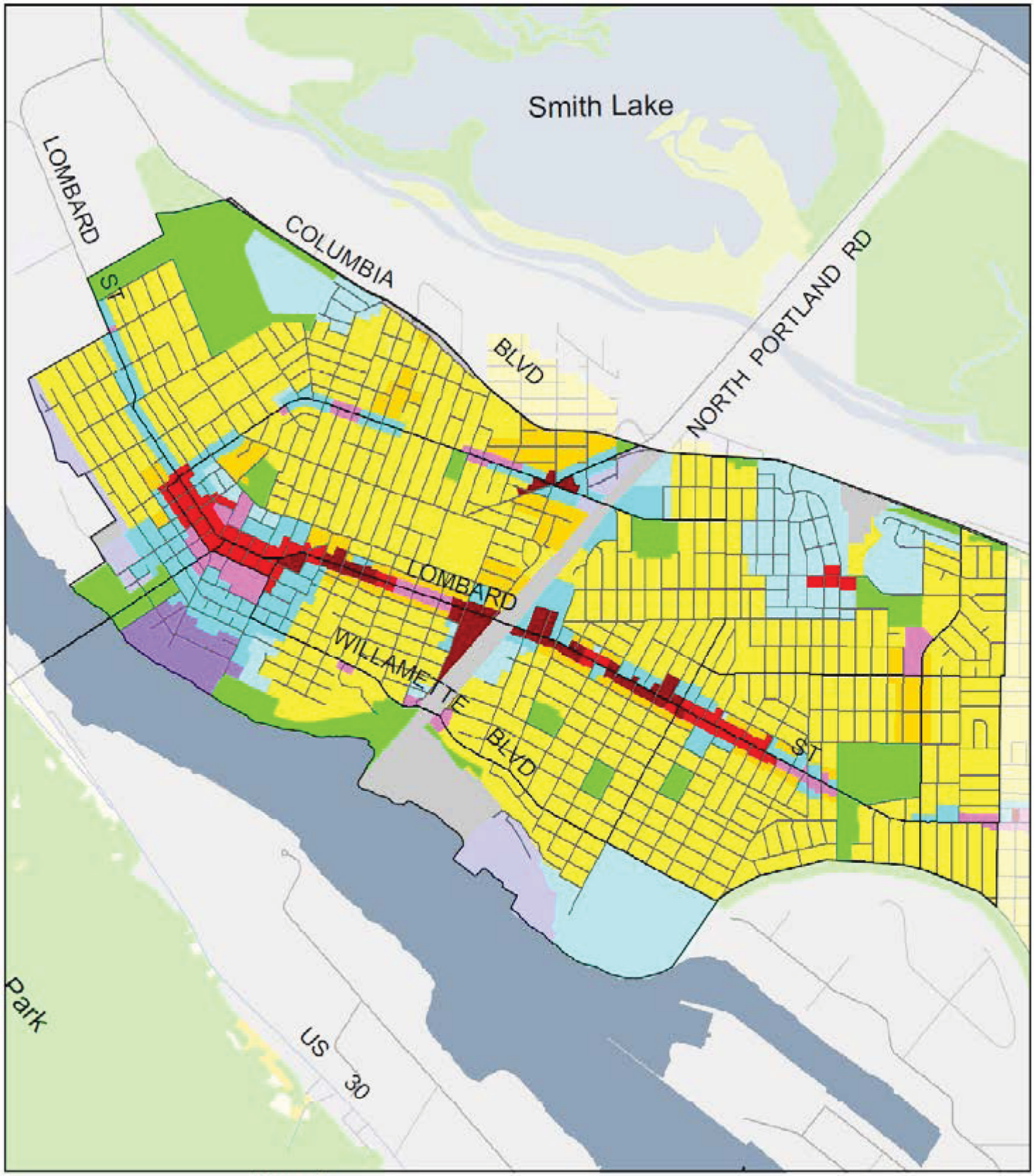
2010 Housing Units (Census):	12,367
2035 Housing Units:	16,400

Comprehensive Plan Designations Map *(next page)*

Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

St. Johns Analysis Area



Comprehensive Plan Designations

February 1, 2012

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Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

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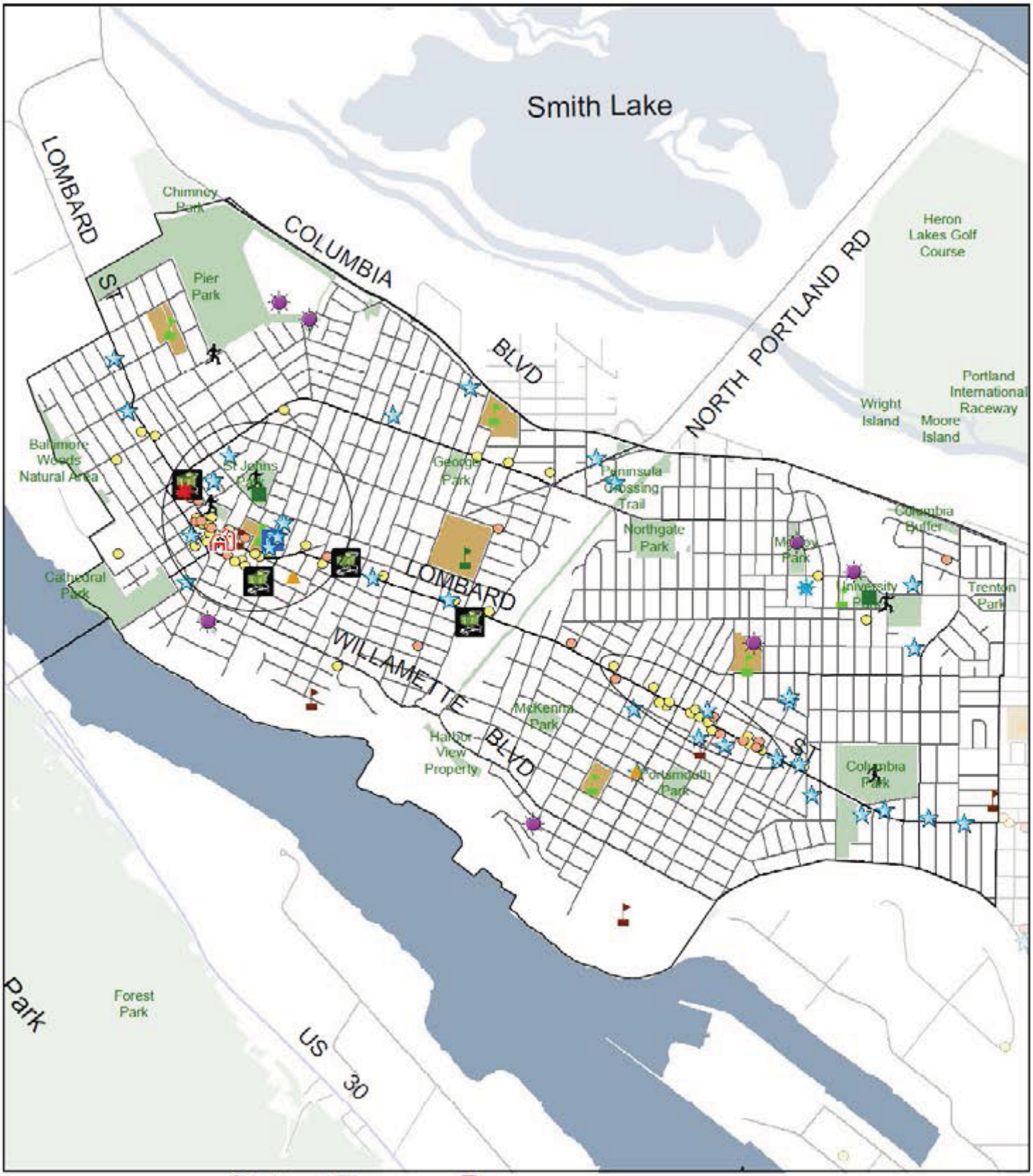
St. Johns Analysis Area



Services and Amenities

February 1, 2012

commercial data: InfoUSA 2008

Bureau of Planning and Sustainability

St. Johns Analysis Area

Transit Infrastructure

Light Rail Stops
- MAX
- Street Car
- MAX
- Streetcar

Bus Stops
- Frequent Stops
- Standard Stops
- Rush Hour Stops
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

February 1, 2012

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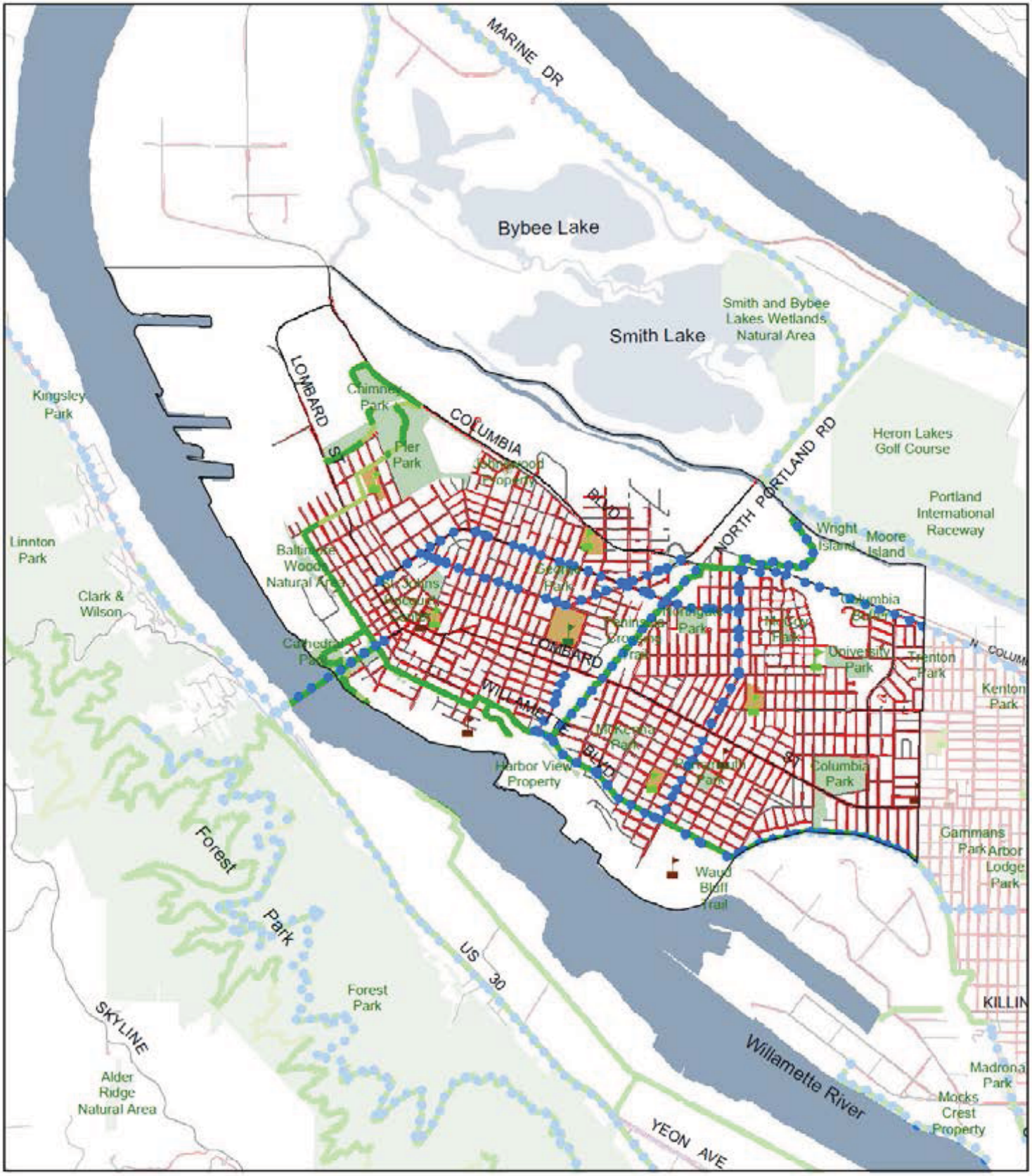
St. Johns Analysis Area



Sidewalks and Bicycle Infrastructure

August 9, 2011

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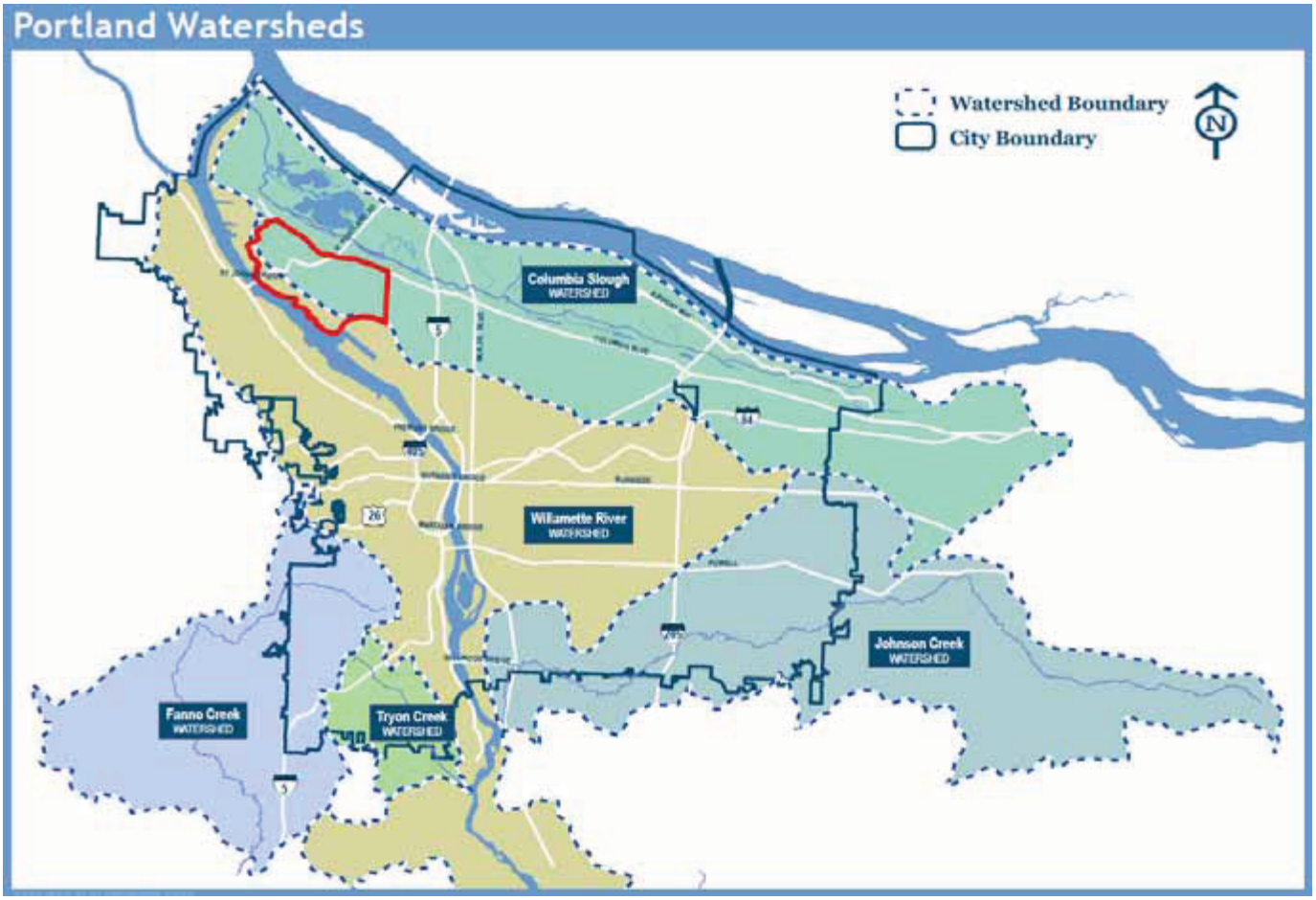
- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools

NORTH

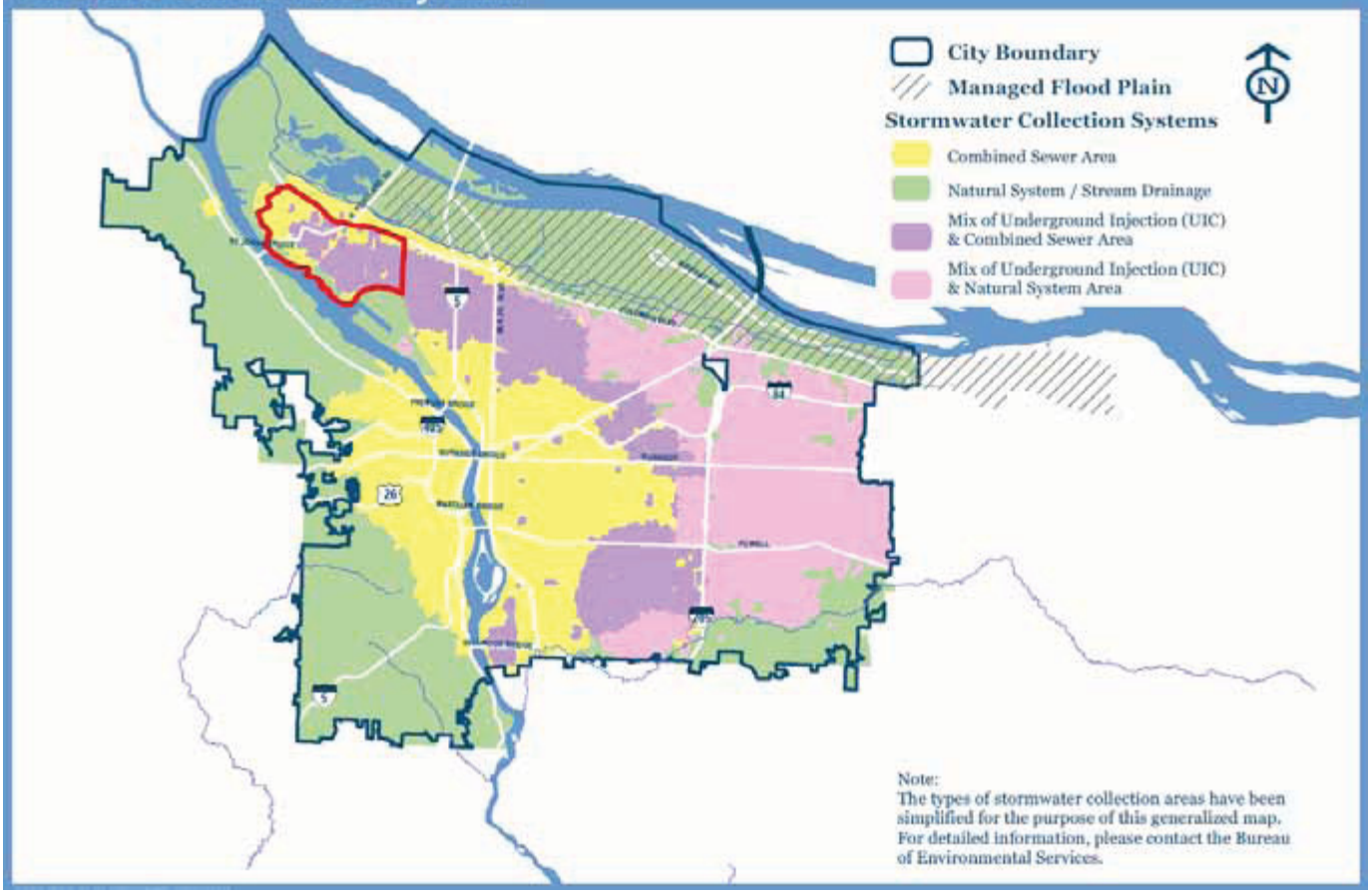
0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

Portland Watersheds



Portland Stormwater System



St. Johns Analysis Area

Watersheds and Natural Features

Slope Hazard
High Structure Vegetation
FEMA 100-year floodplain
Waterbodies
Open channel stream
Piped/culverted stream
City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

February 1, 2012

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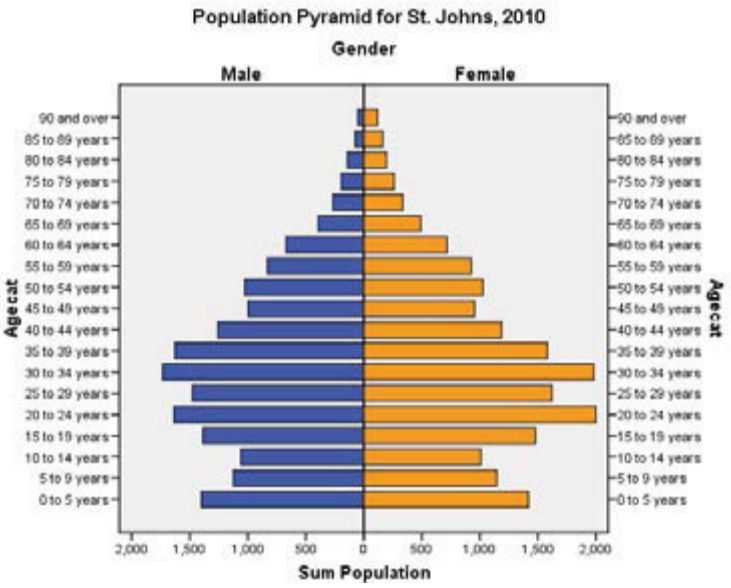
St. Johns Analysis Area
Demographics (2000 – 2010)

ESRI Business Analyst and US Census 2010 (except as noted)

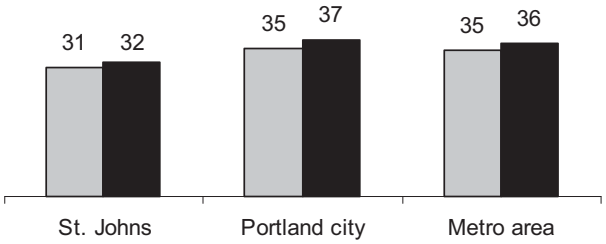
Population

	St. Johns	Portland city	Metro area
2010	32,462	583,776	2,226,009
2000	28,977	529,121	1,927,881
% change	12%	10%	15%

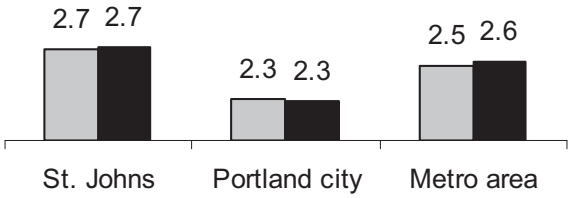


2000 2010

Median Age

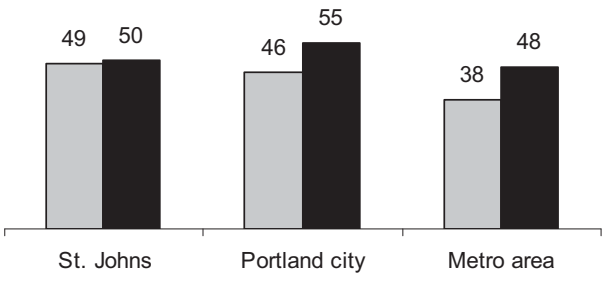


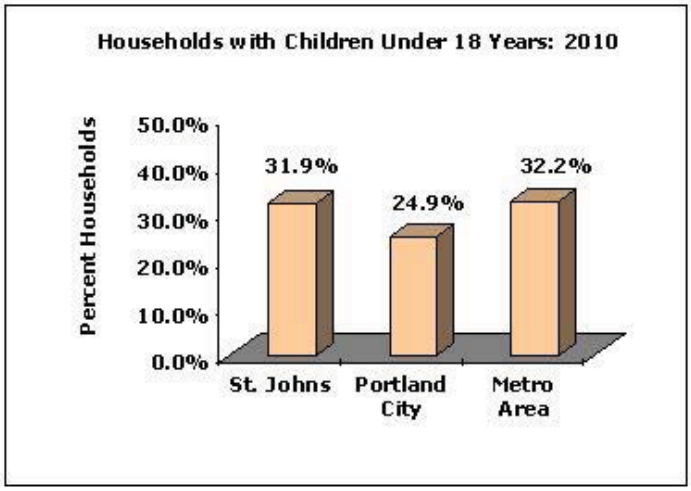
Average Household Size



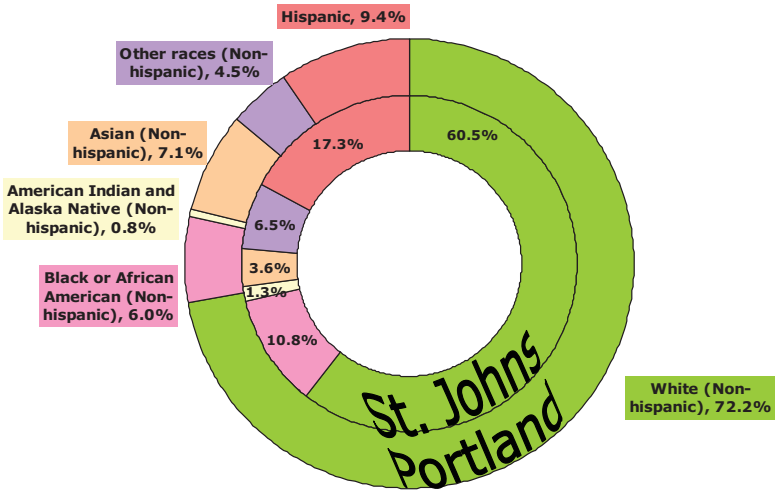
Diversity Index

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

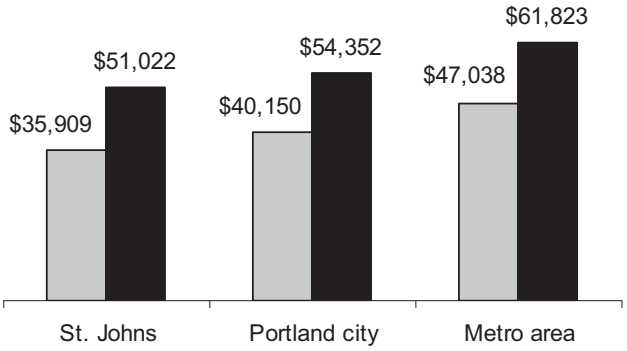


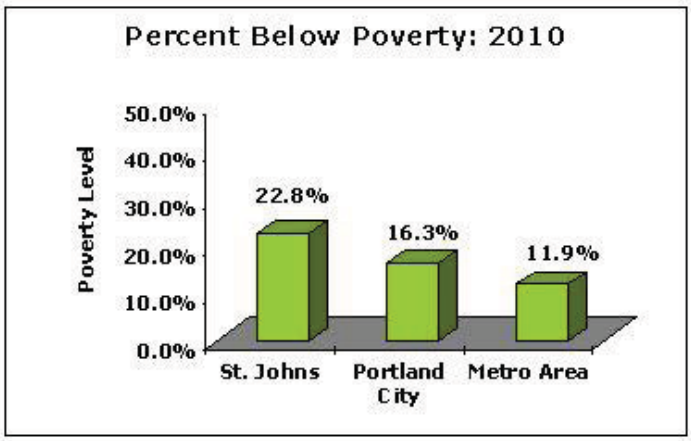


Racial and Ethnic Distribution in Portland vs. St. Johns



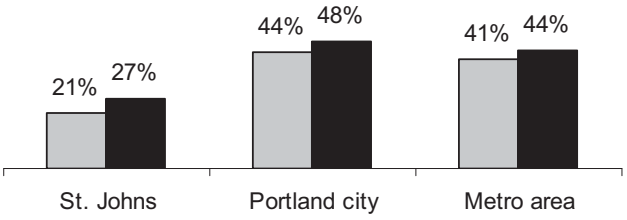
Median Household Income



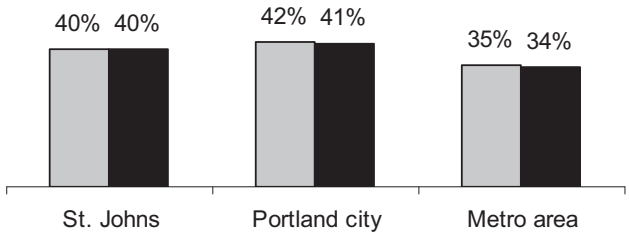


ACS 2006-2010

Percent College Graduates



Percent Renters of Occupied Housing Units



Median Home Value

	St. Johns	Portland city	Metro area
2010	$192,095	$253,184	$273,500
2000	$122,775	$154,721	$168,347
% change	56.5%	63.6%	62.5%

St. Johns Analysis Area
Commercial Real Estate Indicators

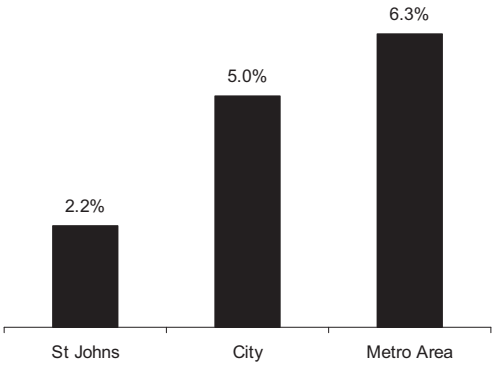
Retail and Commercial Real Estate data through 9-16-2010
Source: COSTAR

RETAIL

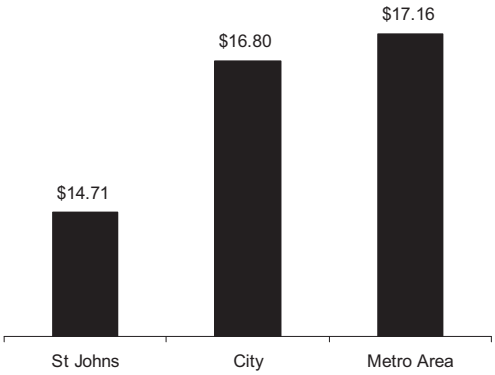
Square Feet

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

Retail Vacancy



Retail Rents

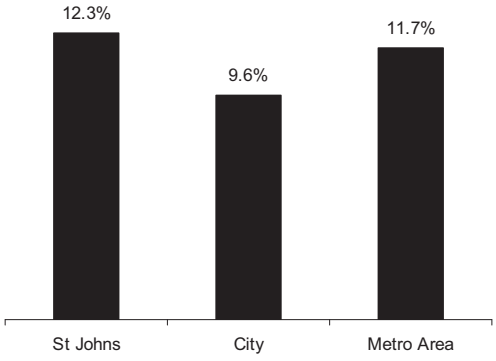


OFFICE SPACE

Square Feet

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

Office Vacancy



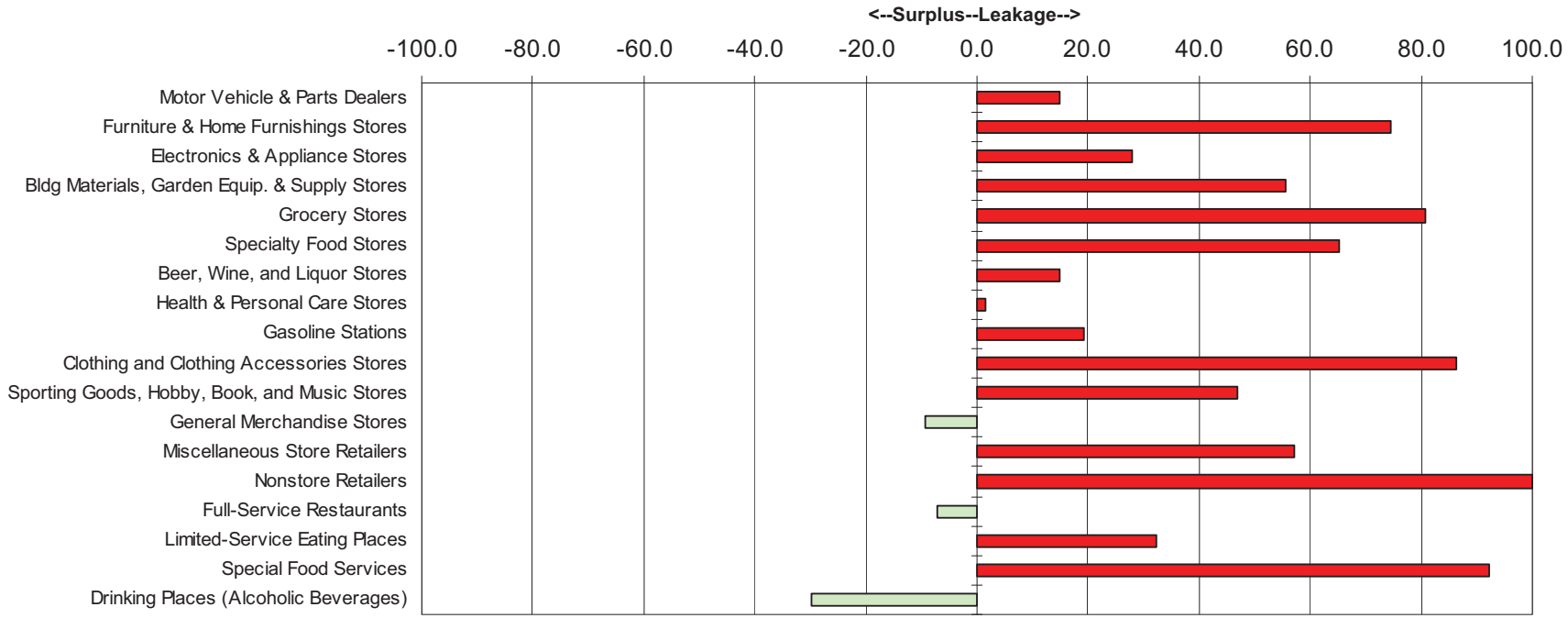
Office Rents

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 the difference between the potential spending in an area, based on population, 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." (Source: ESRI Business Analyst)



St. Johns Analysis Area
Employment

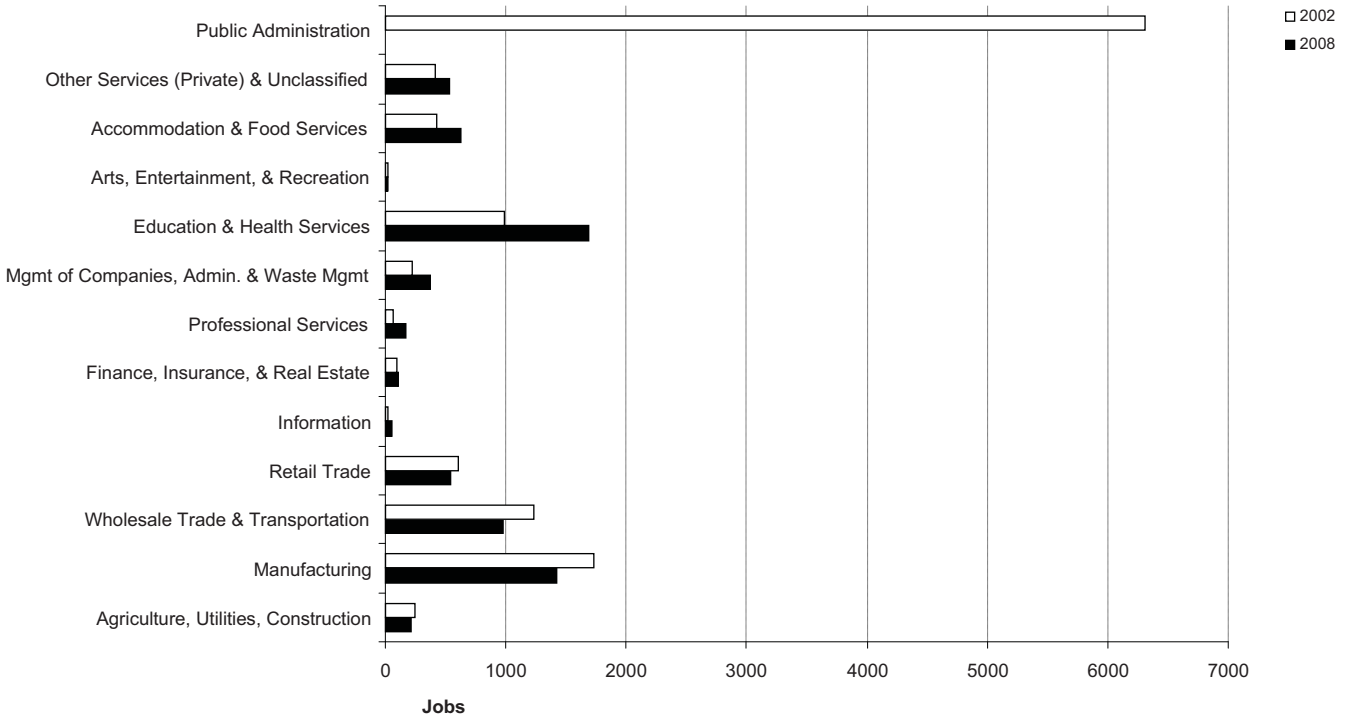
Quarterly Census of Employment and Wages data for 2002 & 2008
Source: Oregon Employment Department (OED)

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.

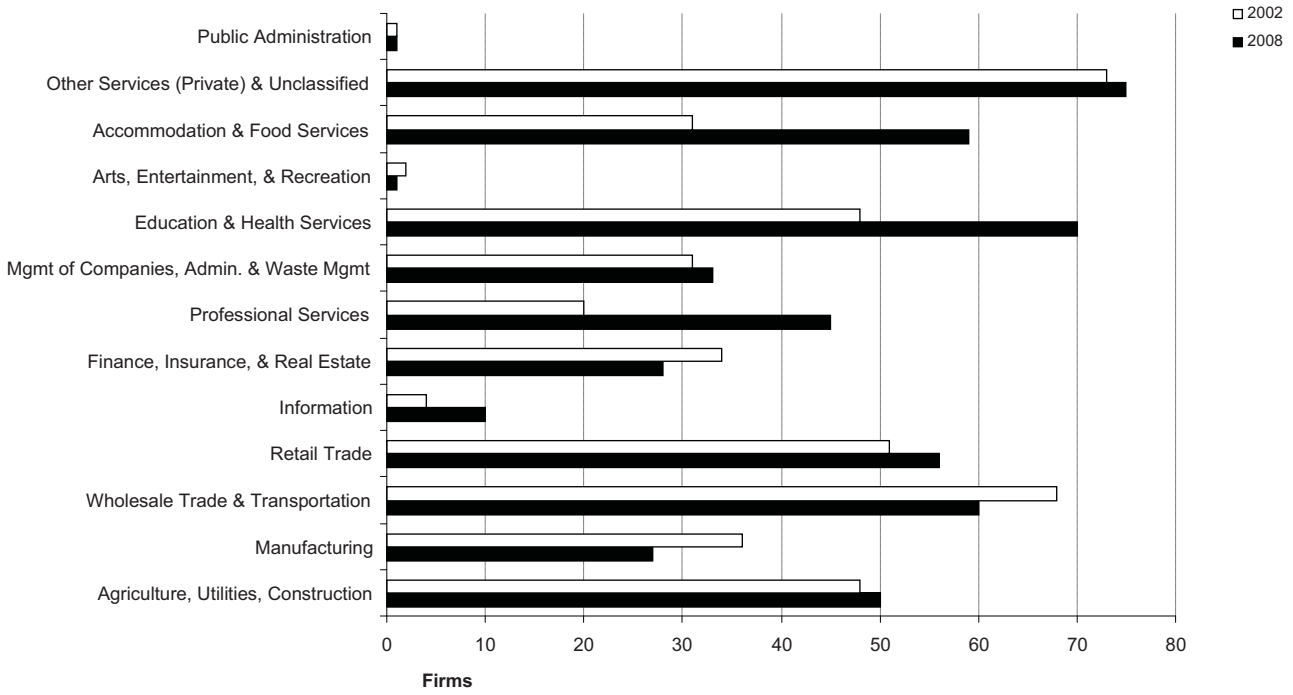
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices 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

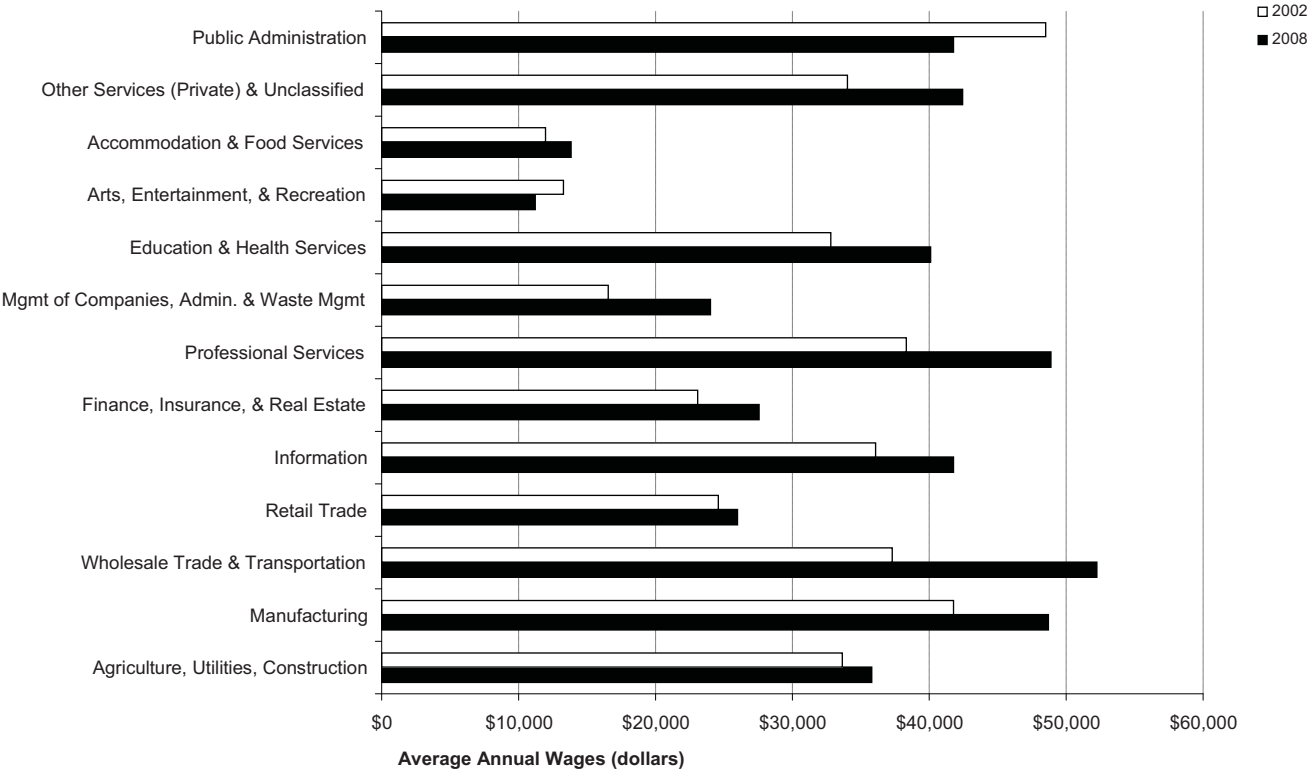
Total Jobs



Total Firms



Average Annual Wages

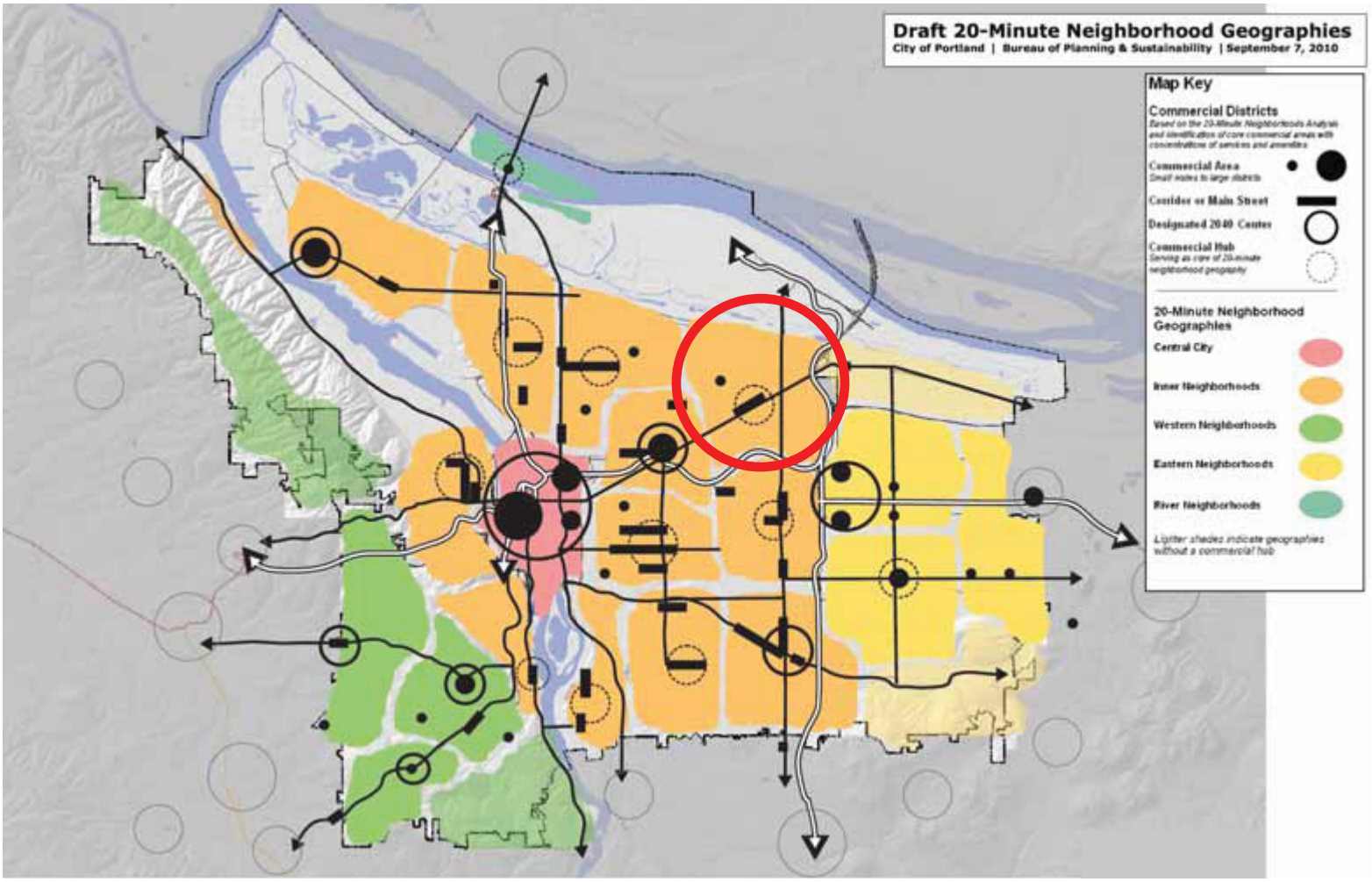


5

Roseway-Cully Analysis Area

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

Services, Demographics and Market Summary



20-Minute Neighborhoods Analysis

June 5, 2012

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: 5.8 square miles (5,900 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 (1 store per 6,950 households)

Retail gap: $94 million gap *(amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area)*

Community Amenities

Proximity to Services and Amenities

Percentage of population:

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*:	72%
Within 1/2 mile of a full-service grocery store:	17%
Within 1/4 mile of a frequent service transit stop:	47%

**Parks Bureau service standard*

Community Centers: None

Libraries: 1 (Gregory Heights Library)

Parks and Open Spaces: 341 acres - including Rose City Golf Course, Rocky Butte, Normandale Park, Glenhaven Park, 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)

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

Urban Form Characteristics

This area includes a mix of inner neighborhood characteristics, such as compact blocks with fully-improved streets and sidewalks, and eastern neighborhood characteristics, such as large blocks, streets without sidewalks and unimproved roadways. Commercial streets include some traditional main street areas with street-fronting buildings and more auto-oriented corridors with surface parking lots. Rocky Butte, at the area's eastern edge, is the most prominent topographical feature in the area, which is bordered to the south by the I-84 Freeway and to the north by industrial areas and the Columbia Slough.

Access issues. Includes a mix of areas with good street and sidewalk connectivity and other areas (particularly in the Cully neighborhood) with poor street and sidewalk connectivity. Portions of the area lack convenient access to transit and to commercial and community services. Freeways act as barriers to adjacent areas toward the east and south.

2040 Growth Concept: Designated Mixed-Use Areas

The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.

Mixed-Use Centers:	0
Main Streets:	4.2 miles (Sandy, 82nd Avenue, Cully, Killingsworth)
Station Communities:	3

Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,646	62%	227
Multi-Family Residential:	276	10%	79
Commercial/Mixed-Use:	125	5%	75
Employment:	189	7%	80
Industrial:	104	4%	1
Open Space:	328	12%	NA

**From Buildable Lands Inventory (vacant or underutilized)*

Anticipated Growth by 2035

(From Buildable Lands Inventory allocations, based on development capacity and trend information)

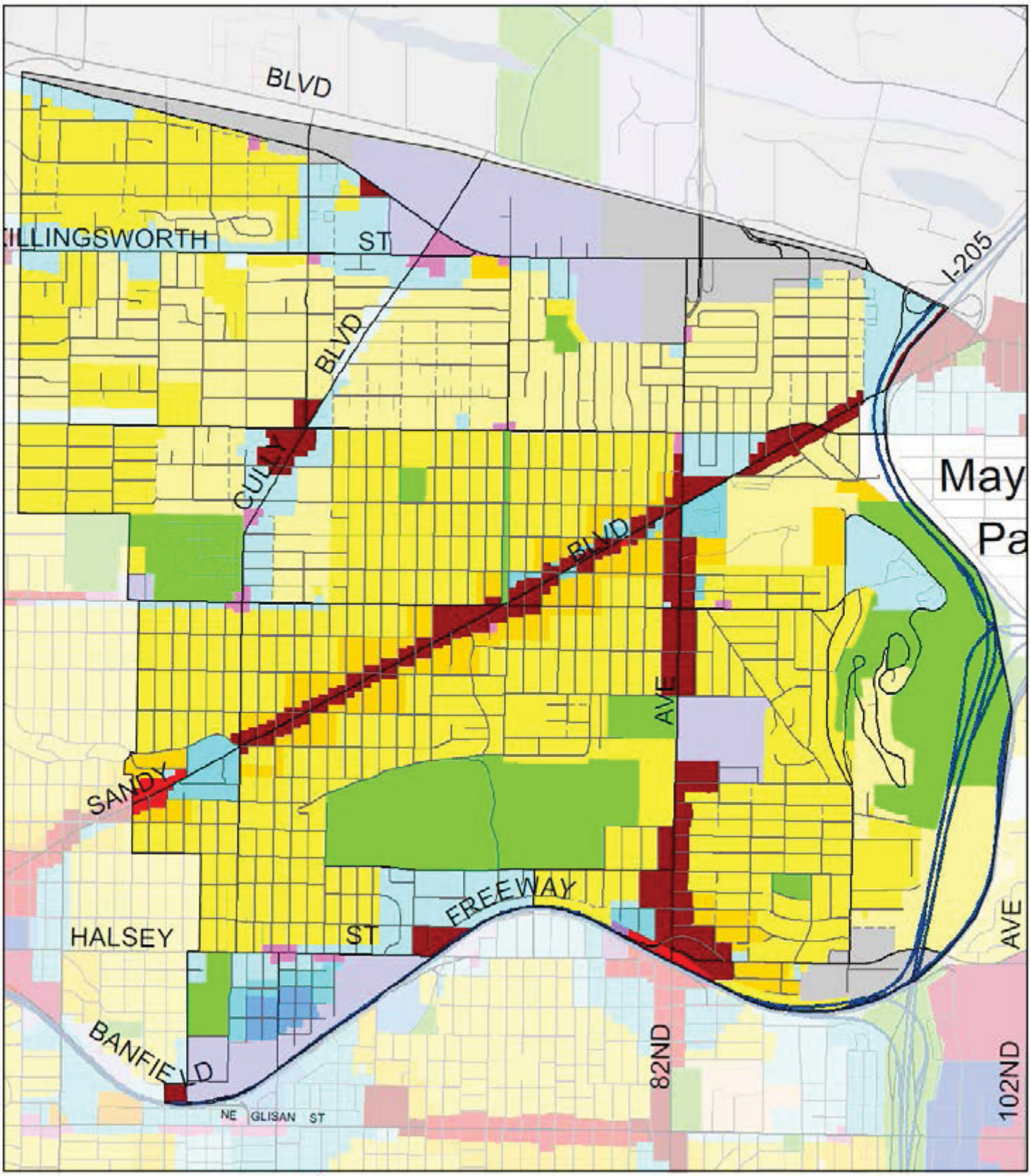
2010 Housing Units (Census):	14,170
2035 Housing Units:	17,400

Comprehensive Plan Designations Map *(next page)*

Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

Roseway-Cully Analysis Area



Comprehensive Plan Designations

February 1, 2012

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Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	

NORTH

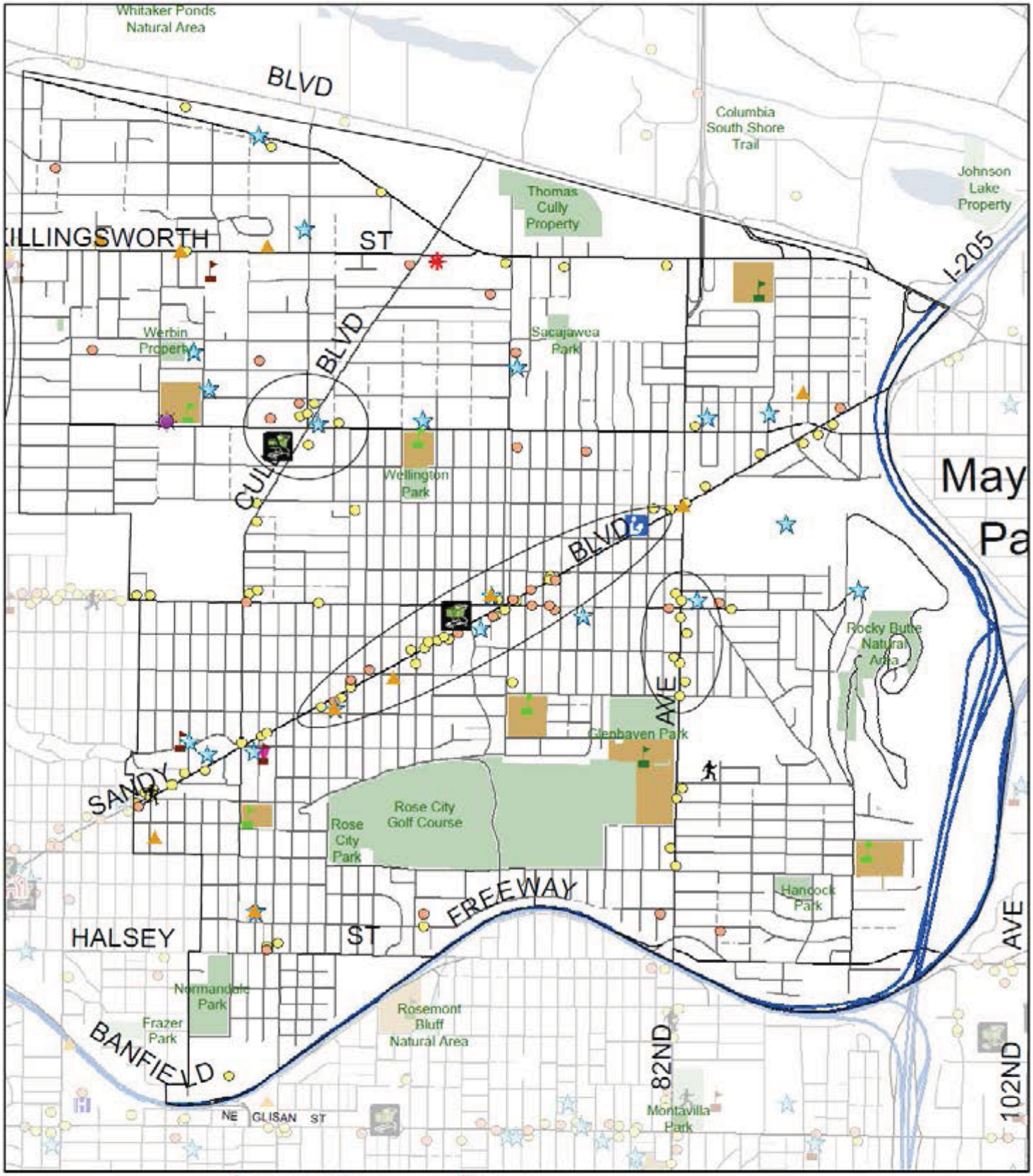
0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

Innovation. Collaboration. Practical Solutions.

City of Portland Oregon
Sam Adams, Mayor - Susan Anderson, Director

Roseway-Cully Analysis Area



Services and Amenities

February 1, 2012

commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Farmers Markets
- Community Gardens
- Community Centers
- County Health Clinic
- County Aging Services
- Preschools
- Daycare Centers
- Public HS
- Public K-8
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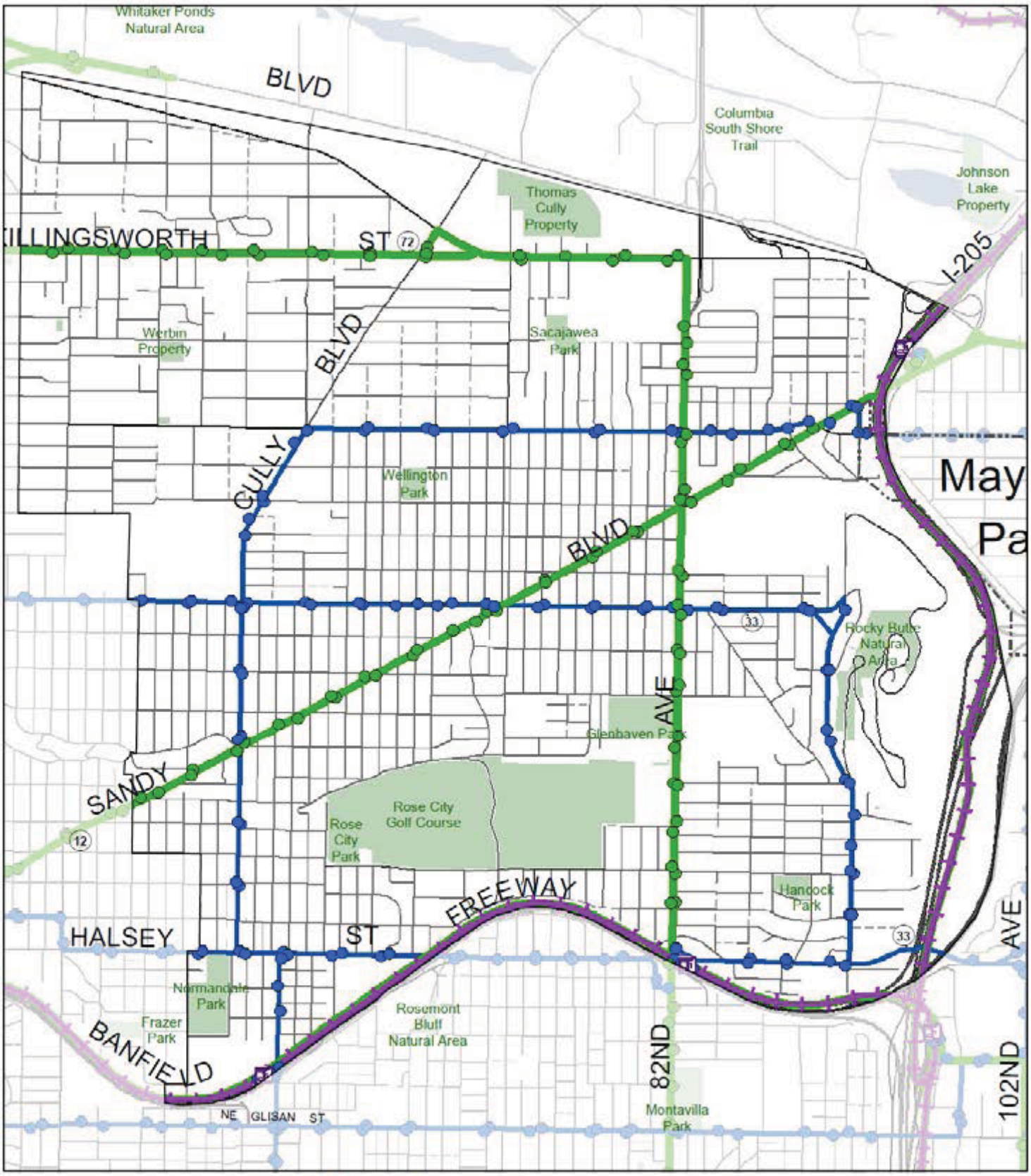
Bureau of Planning and Sustainability

Roseway-Cully Analysis Area



Transit Infrastructure

Light Rail Stops
- MAX
- Street Car
- MAX
- Streetcar

Bus Stops
- Frequent Stops
- Standard Stops
- Rush Hour Stops
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

February 1, 2012

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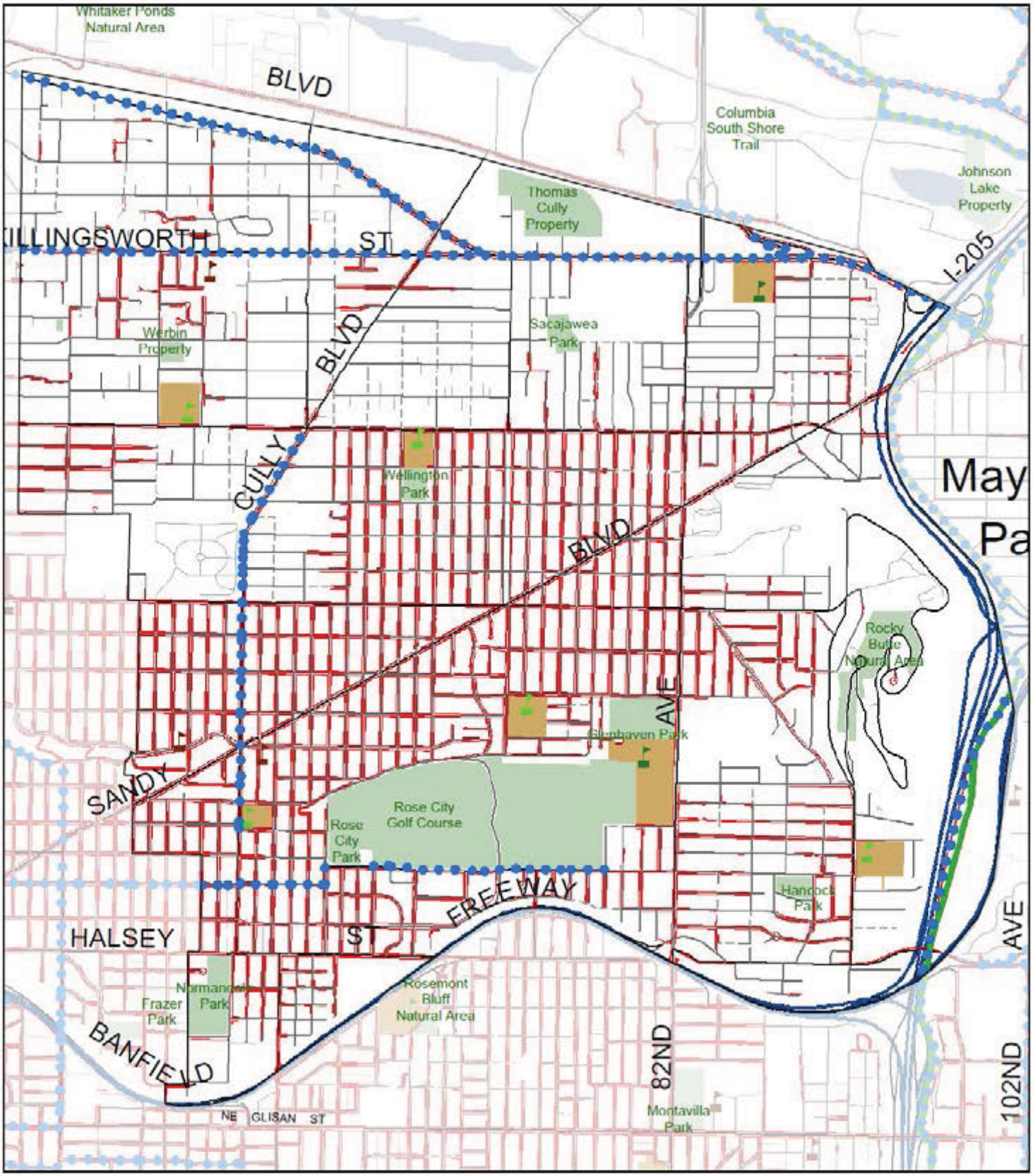

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February 1, 2012

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regional trails outside Portland (existing)
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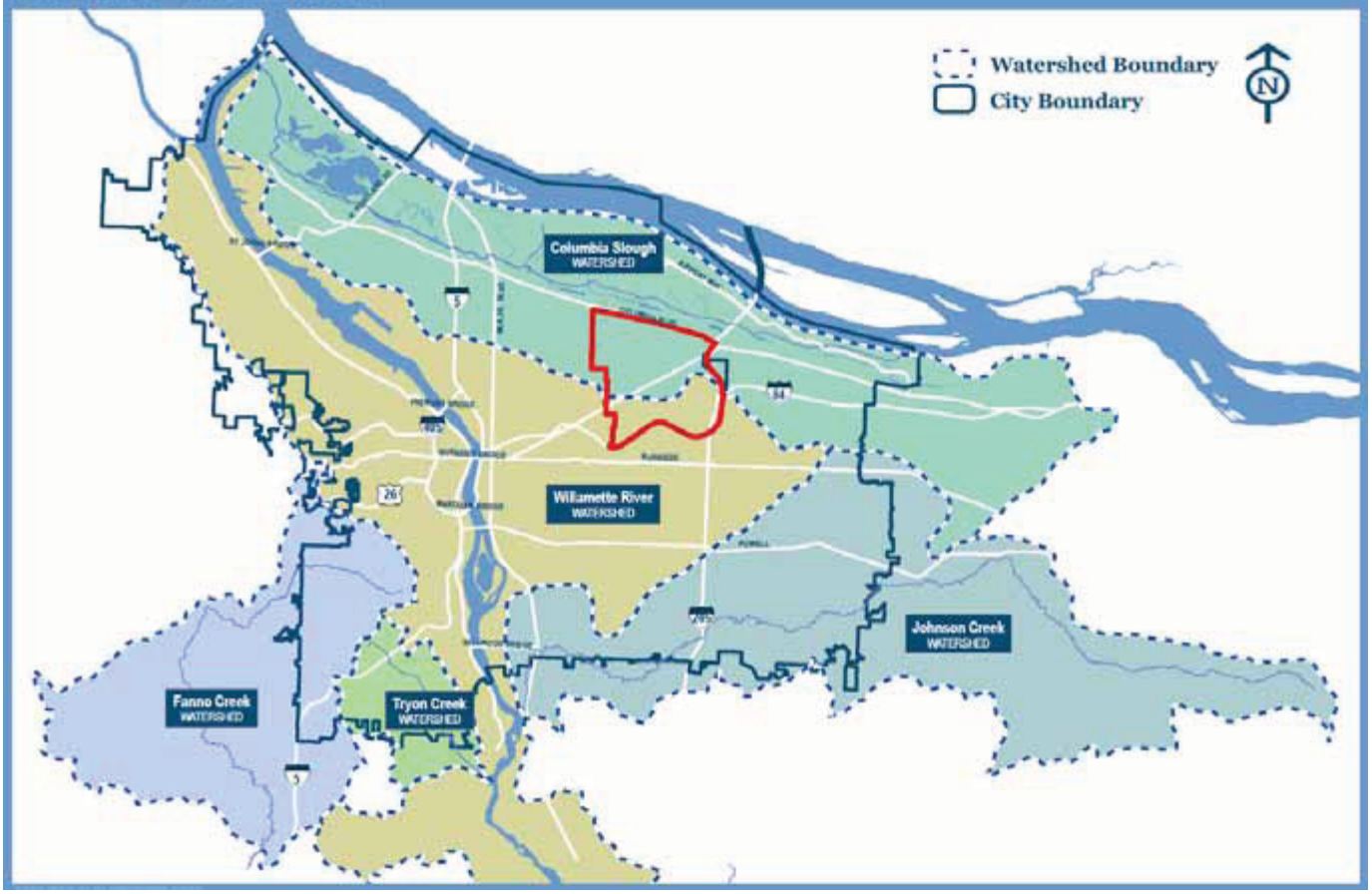
Bureau of Planning and Sustainability

Portland Watersheds



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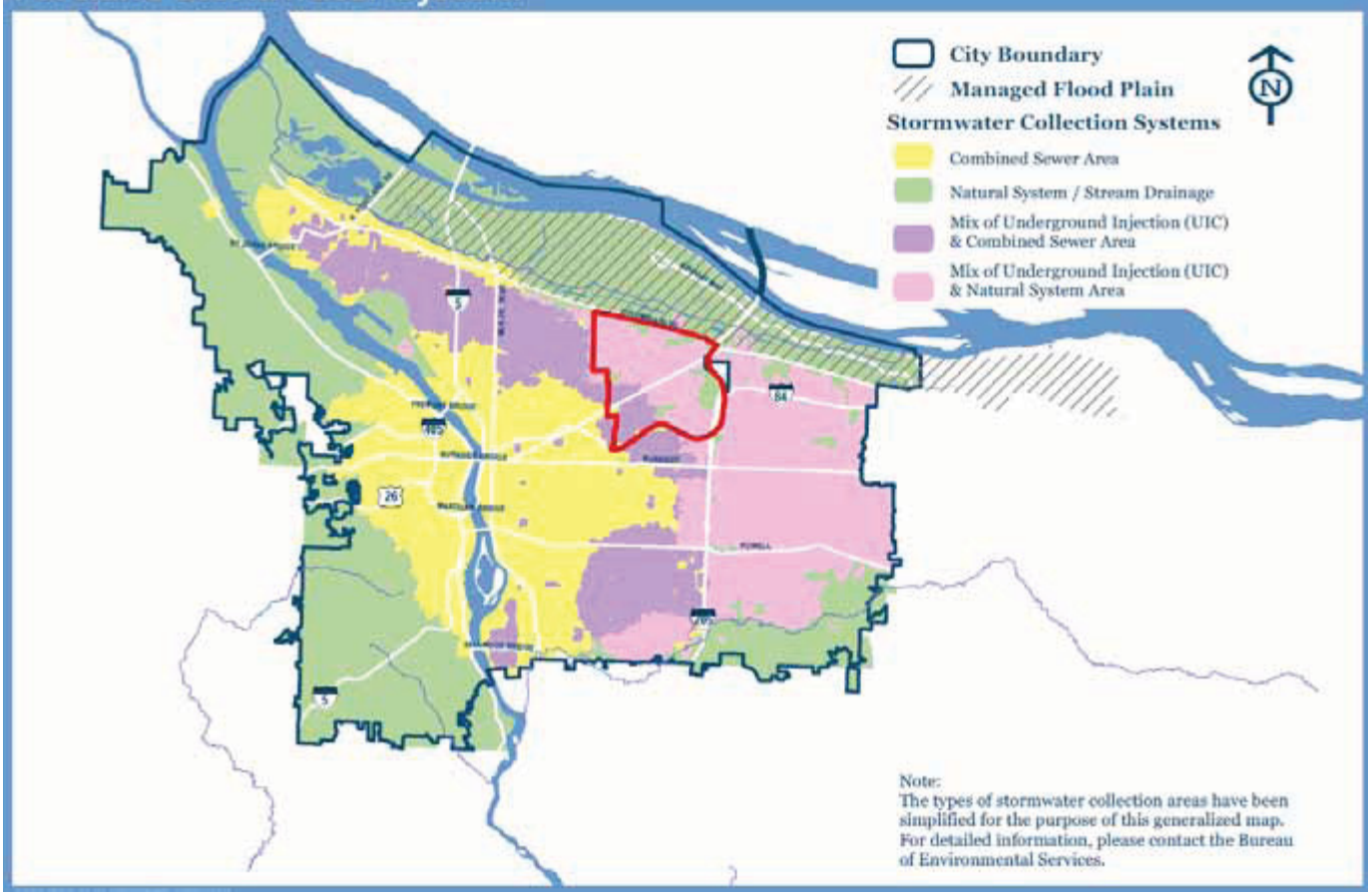

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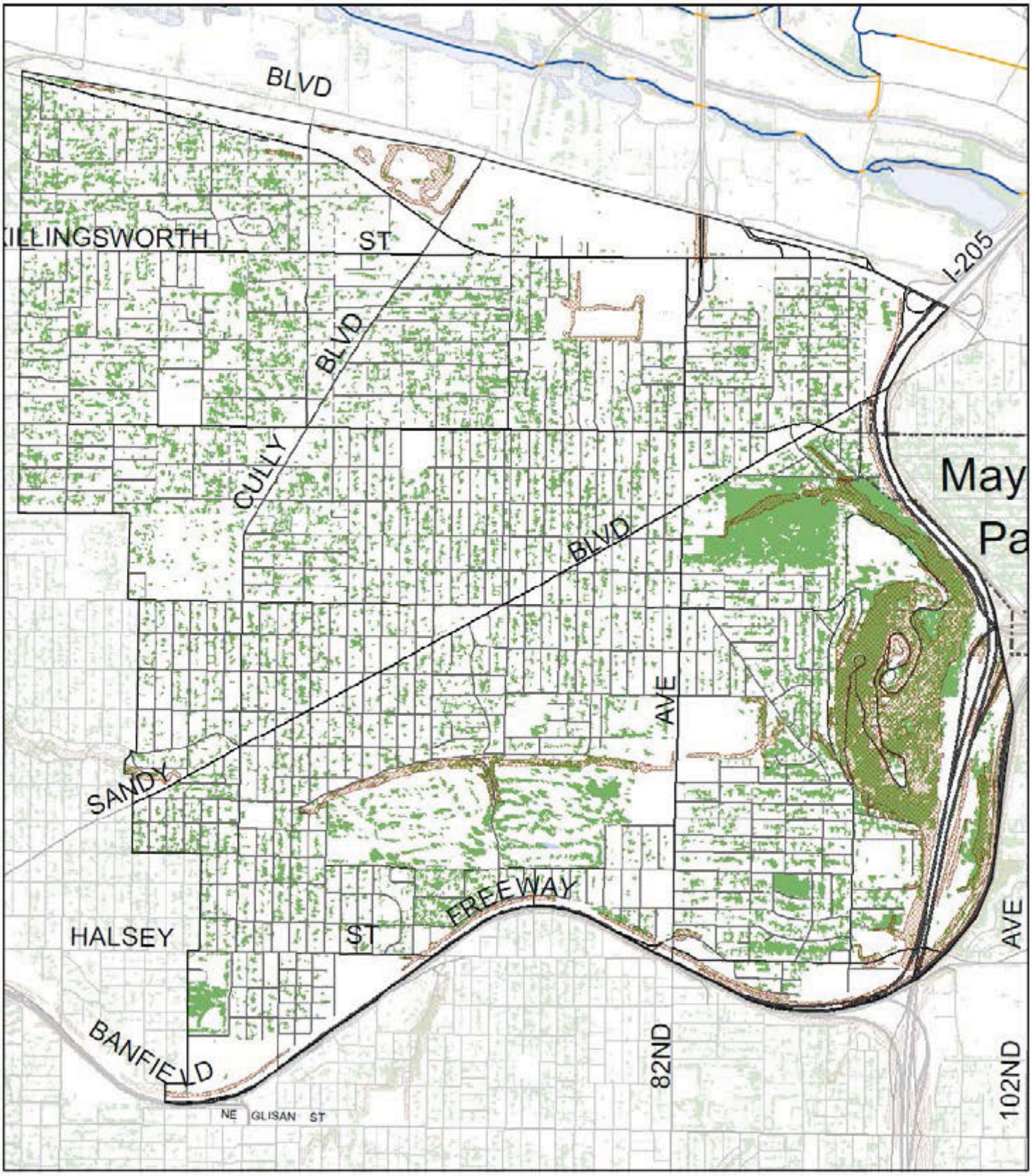

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High Structure Vegetation
FEMA 100-year floodplain
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Bureau of Planning and Sustainability

February 1, 2012

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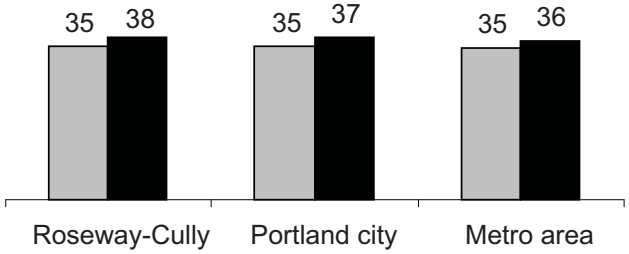

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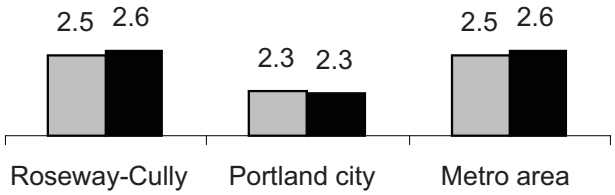

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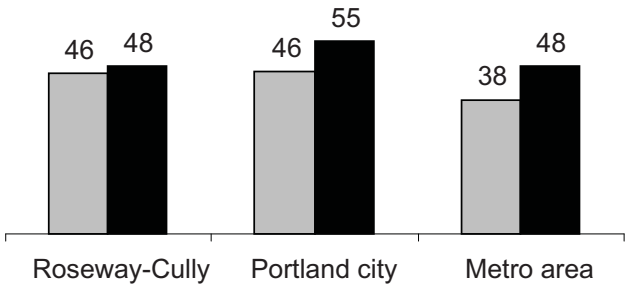
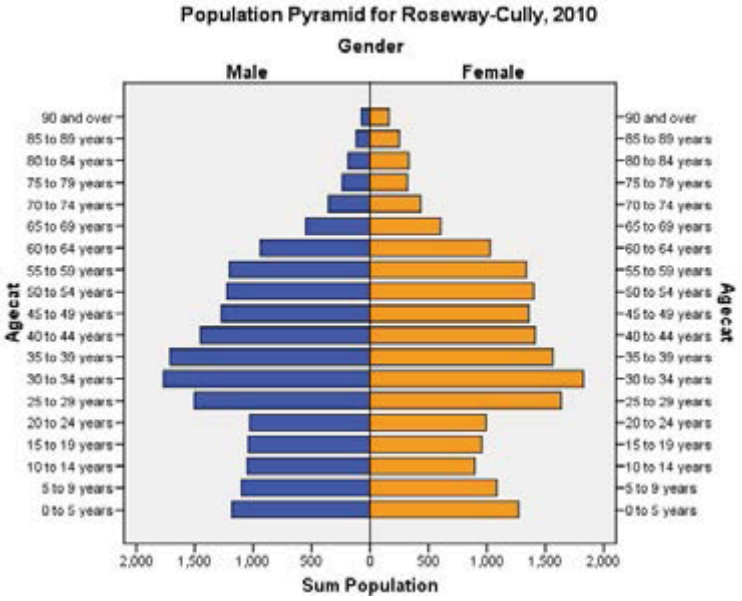
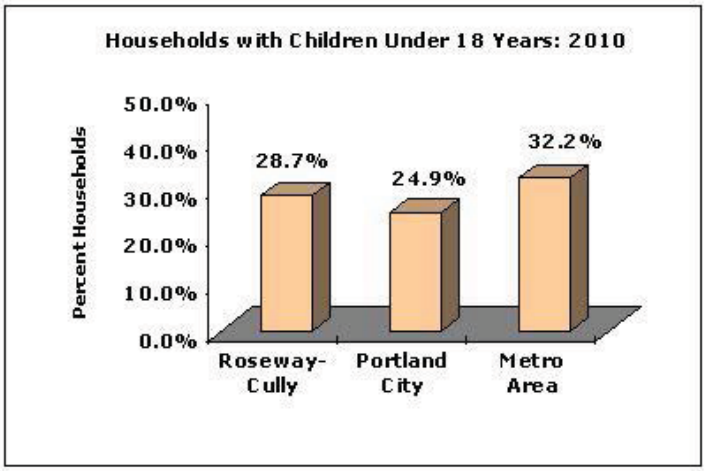
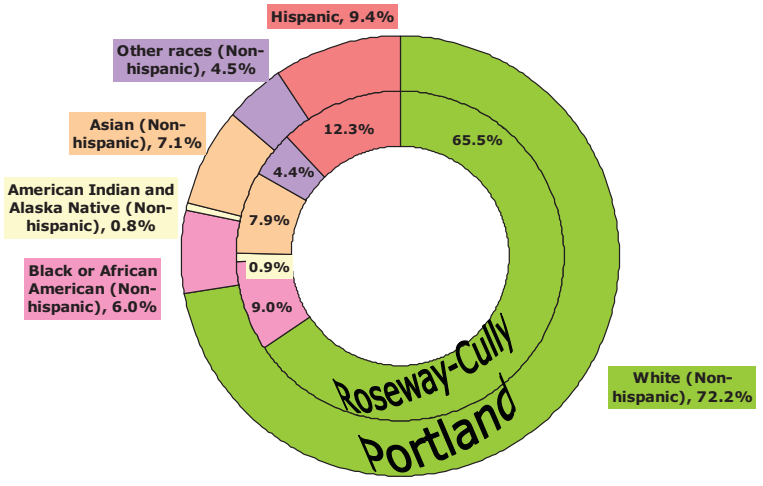






Racial and Ethnic Distribution in Portland vs. Roseway-Cully



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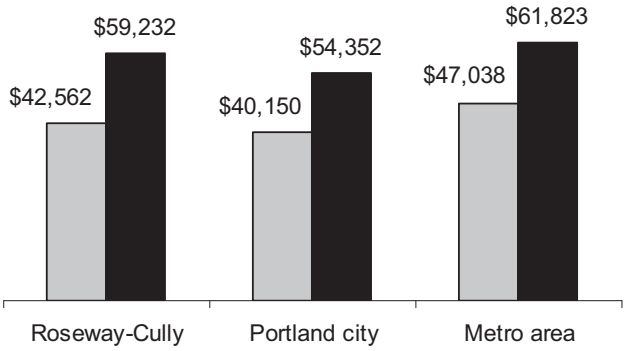
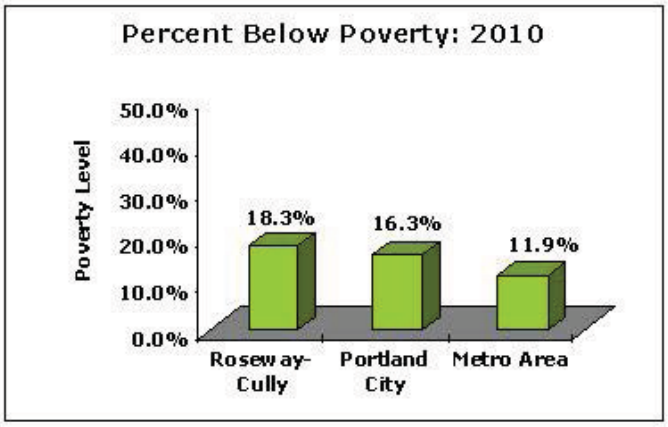
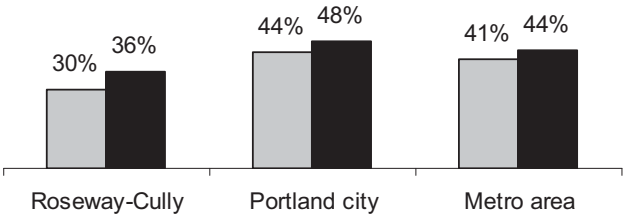


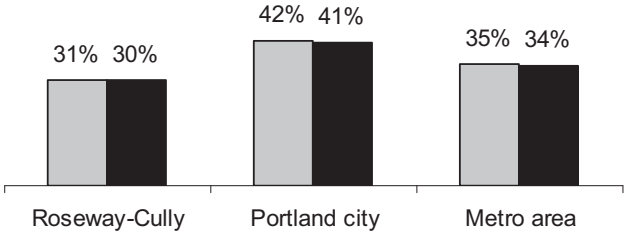


ACS 2006-2010

Percent College Graduates



Percent Renters of Occupied Units



Median Home Value

	Roseway-Cully	Portland city	Metro area
2010	$223,725	$253,184	$273,500
2000	$139,966	$154,721	$168,347
% change	59.8%	63.6%	62.5%

Roseway-Cully Analysis Area
Commercial Real Estate Indicators

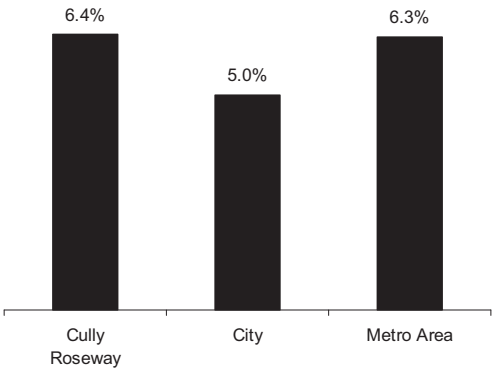
Retail and Commercial Real Estate data through 9-16-2010
Source: COSTAR

RETAIL

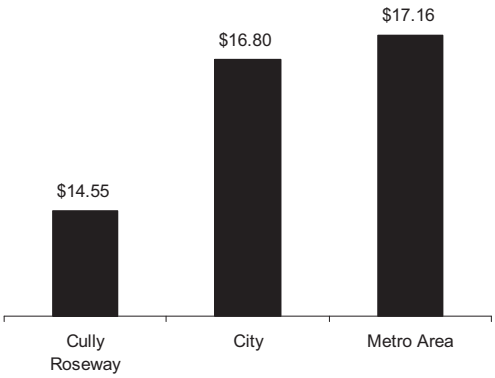
Square Feet

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

Retail Vacancy



Retail Rents

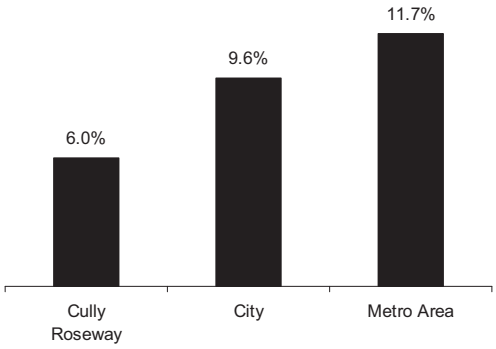


OFFICE SPACE

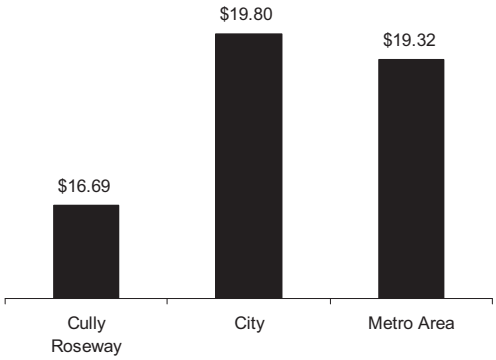
Square Feet

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

Office Vacancy



Office Rents

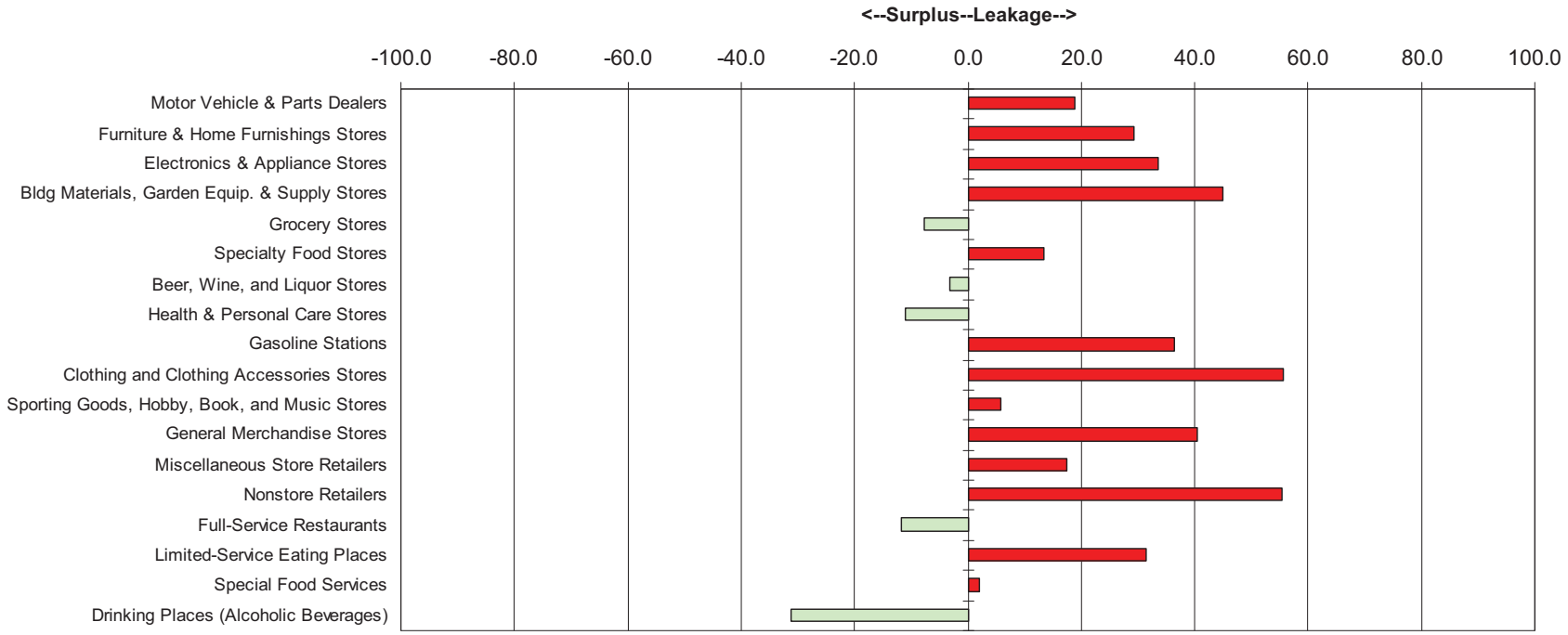


Roseway-Cully Analysis Area
Retail Market Profile

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 the difference between the potential spending in an area, based on population, 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." (Source: ESRI Business Analyst)



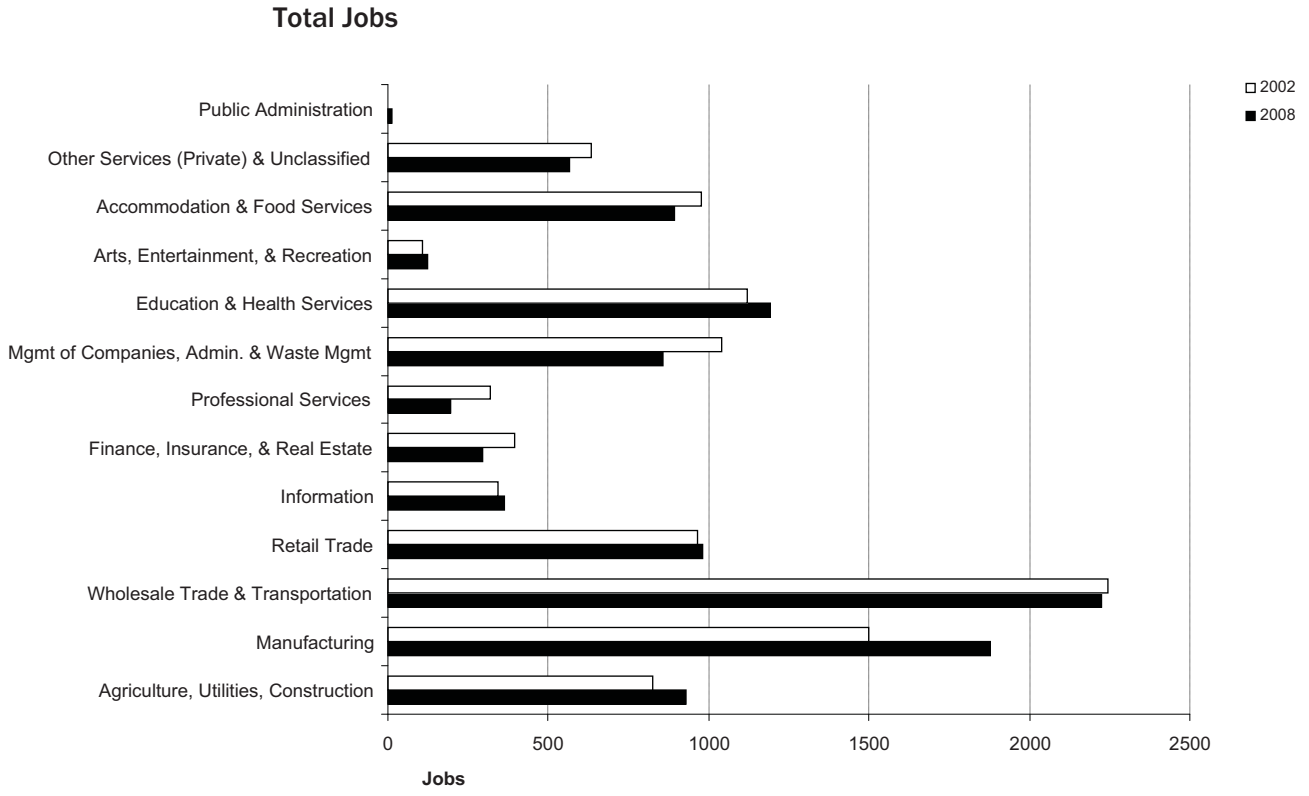
Roseway-Cully Analysis Area
Employment

Quarterly Census of Employment and Wages data for 2002 & 2008
Source: Oregon Employment Department (OED)

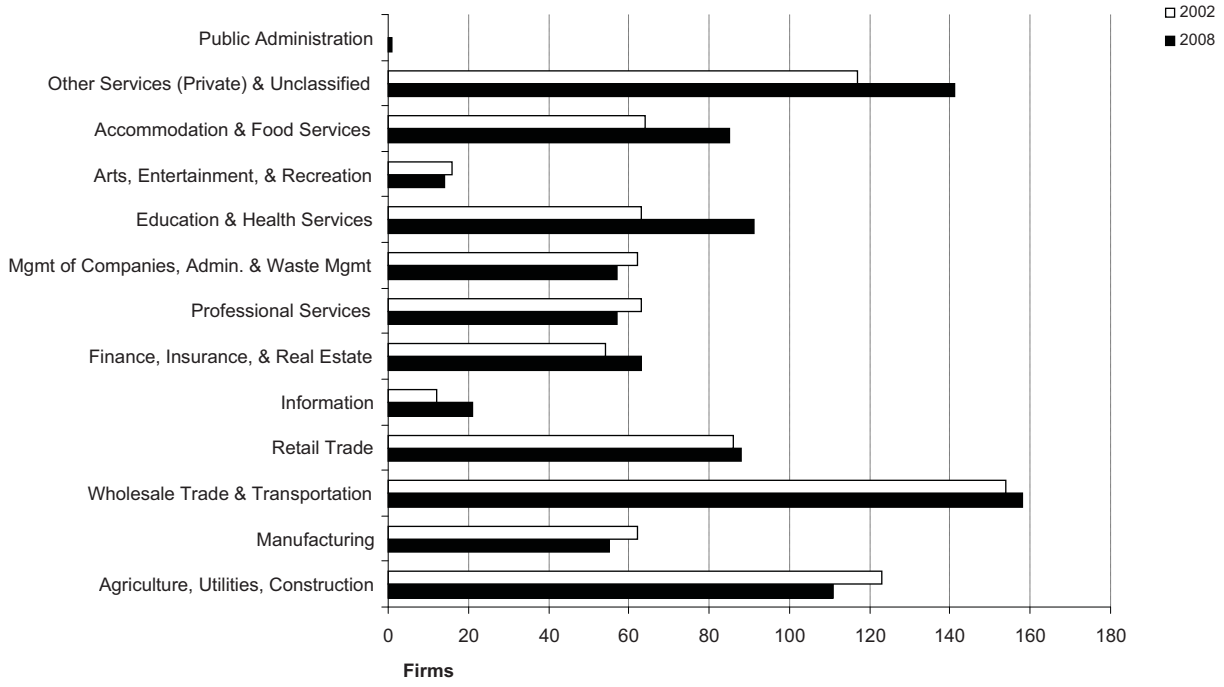
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

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.

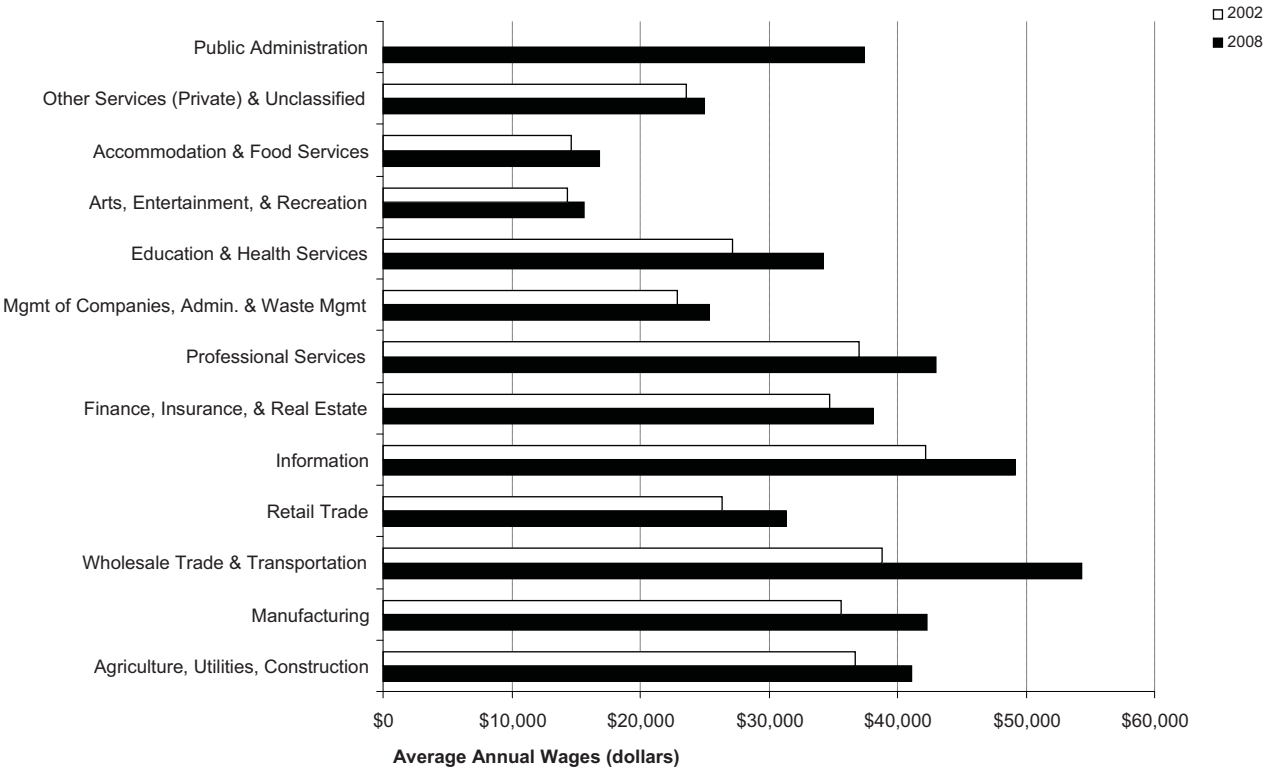
	2002	2008	change
Total Jobs	10,467	10,510	+43
Total Firms	876	942	+66
Average Annual Wages	$30,686	$38,131	+$7,445



Total Firms



Average Annual Wages

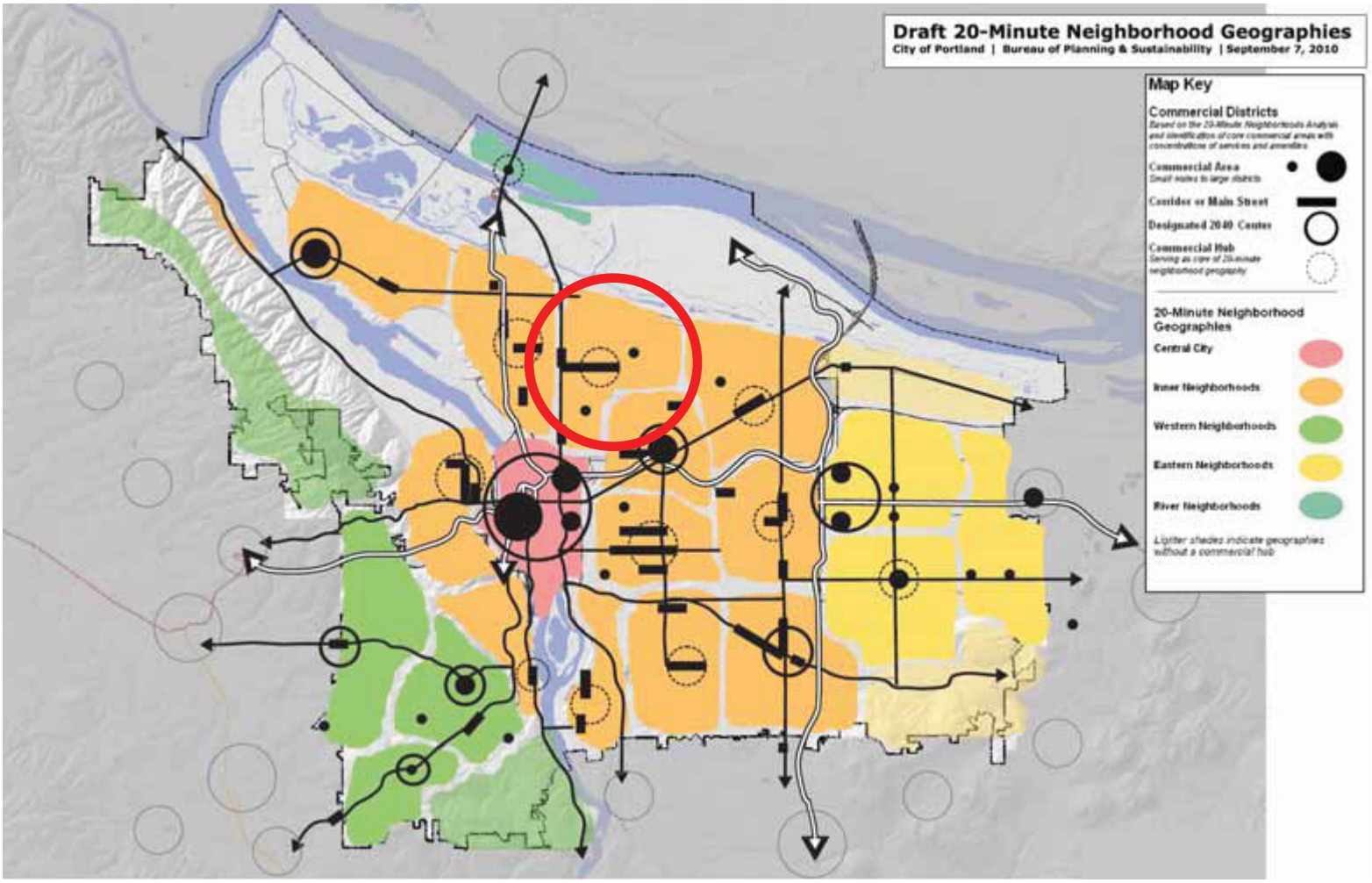


6

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

June 5, 2012

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: 33,700 people (13,900 households)
Land Area: 4.2 square miles (8,000 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 (1 store per 3,475 households)

Retail gap: $77 million gap *(amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area)*

Community Amenities

Proximity to Services and Amenities

Percentage of population:

Within 1/2 mile of a park*:	98%
Within 1/2 mile of a public elementary school:	49%
Within 3 miles of a full-service community center*:	98%
Within 1/2 mile of a full-service grocery store:	41%
Within 1/4 mile of a frequent service transit stop:	81%

**Parks Bureau service standard*

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, King, Sabin, Vernon, Woodlawn)

Colleges (campus)**:** 1 (Concordia University)

Hospitals: None

Farmers Markets: 2 (King Farmers Market, Cully Collective Market – at eastern edge)

Transit Centers/Stations: None

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

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

Urban Form Characteristics

Much of this area is composed of a grid of residential blocks, originally developed during the Streetcar Era with a continuous system of sidewalks. Martin Luther King, Jr. Boulevard, the area's most significant street corridor, includes a mix of traditional main street areas with street-fronting buildings and more auto-oriented development with surface parking lots. The Alberta main street serves as the area's east-west commercial spine. The area is bordered to the north by industrial areas and the Columbia Slough.

Access issues. Good street and sidewalk connectivity. Good access to transit and relatively good access to commercial and community services.

2040 Growth Concept: Designated Mixed-Use Areas

The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.

Mixed-Use Centers:	0
Main Streets:	6.1 miles (Martin Luther King Jr. Blvd, Alberta, Killingsworth)
Station Communities:	0

Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,351	72%	99
Multi-Family Residential:	235	13%	64
Commercial/Mixed-Use:	163	9%	81
Employment:	12	.7%	4
Industrial:	35	2%	0
Open Space:	82	4%	NA

**From Buildable Lands Inventory (vacant or underutilized)*

Anticipated Growth by 2035

(From Buildable Lands Inventory allocations, based on development capacity and trend information)

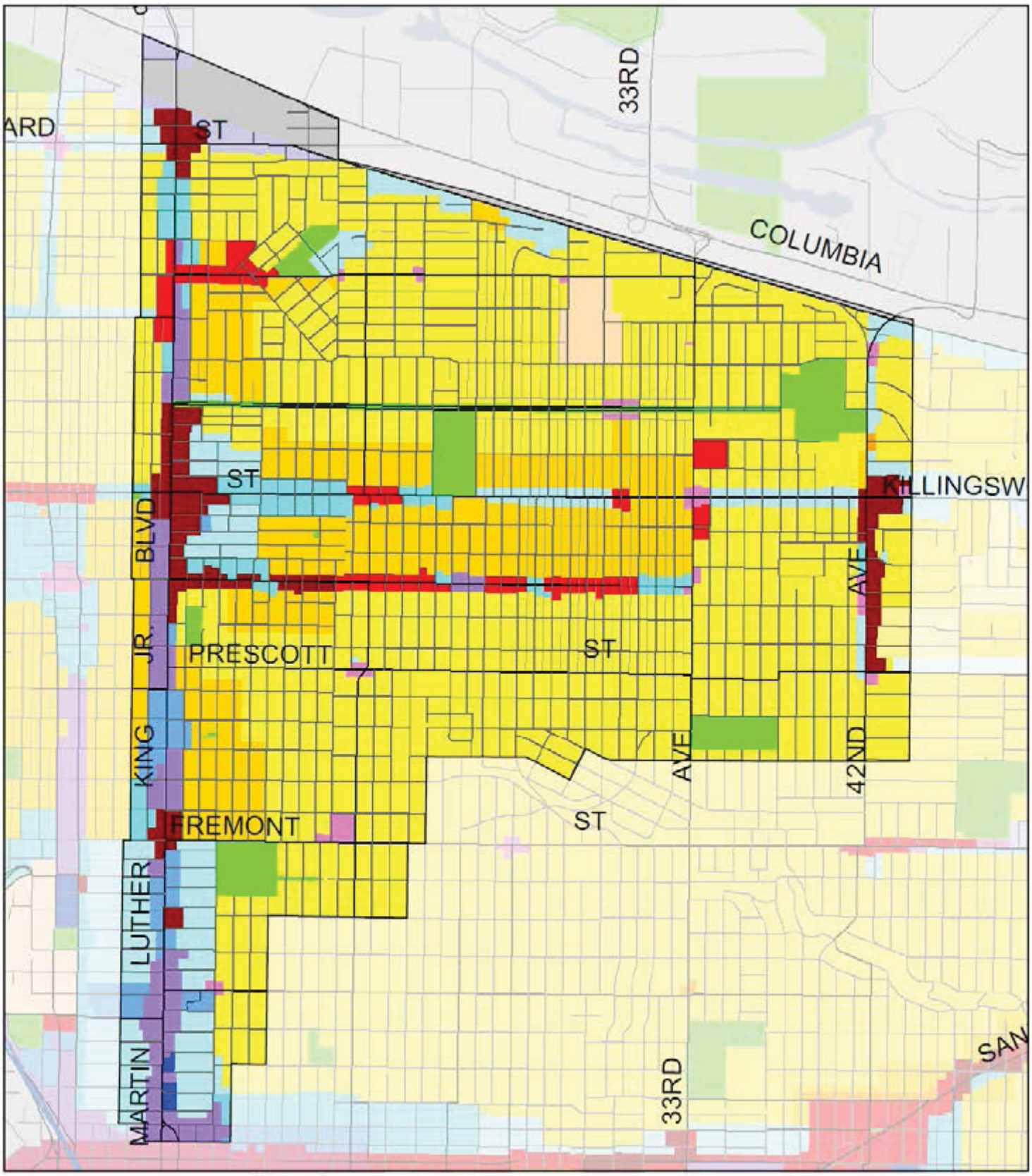
2010 Housing Units (Census):	14,978
2035 Housing Units:	19,600

Comprehensive Plan Designations Map *(next page)*

Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

MLK-Alberta Analysis Area



Comprehensive Plan Designations

February 1, 2012

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Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

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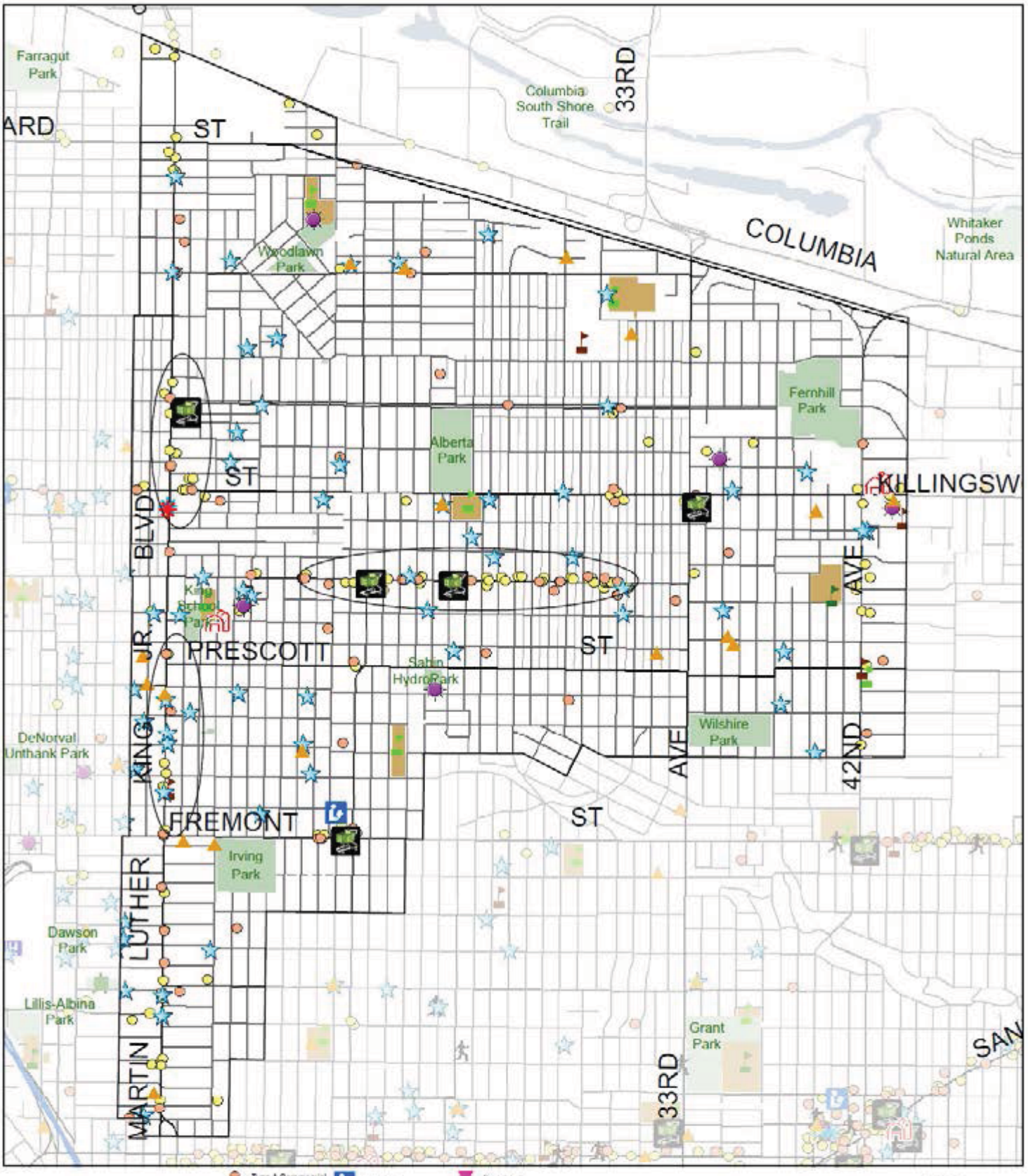
MLK-Alberta Analysis Area



Services and Amenities

February 1, 2012
commercial data: InfoUSA 2008

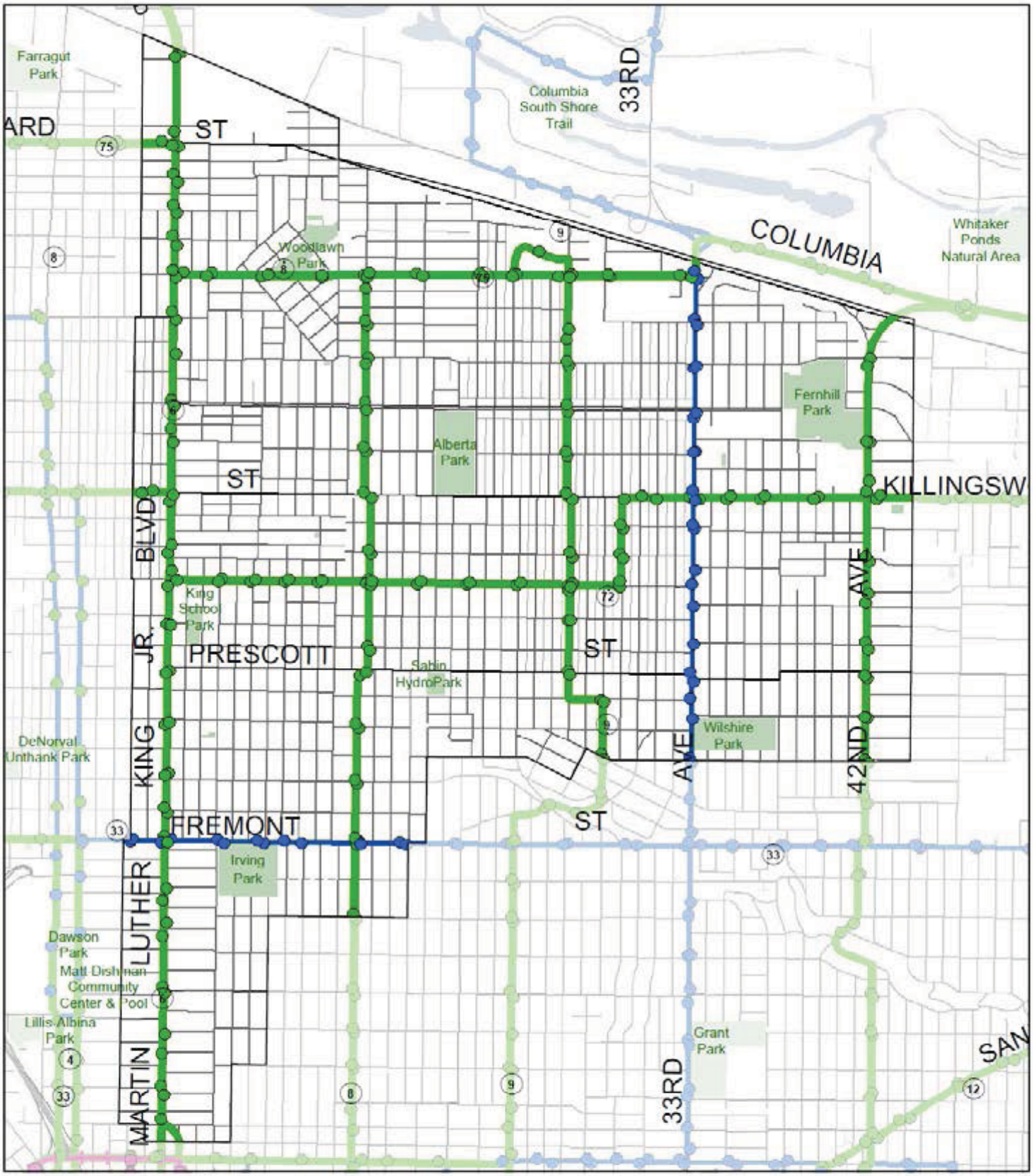
- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Farmers Markets
- Community Gardens
- Community Centers
- County Health Clinic
- County Aging Services
- Preschools
- Daycare Centers
- Public HS
- Public K-8
- Private Schools

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

MLK-Alberta Analysis Area



Transit Infrastructure

Light Rail Stops
- MAX
- Street Car
- MAX
- Streetcar

Bus Stops
- Frequent Stops
- Standard Stops
- Rush Hour Stops
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary

NORTH

0 1,000 2,000 3,000 Feet

Bureau of Planning and Sustainability

February 1, 2012

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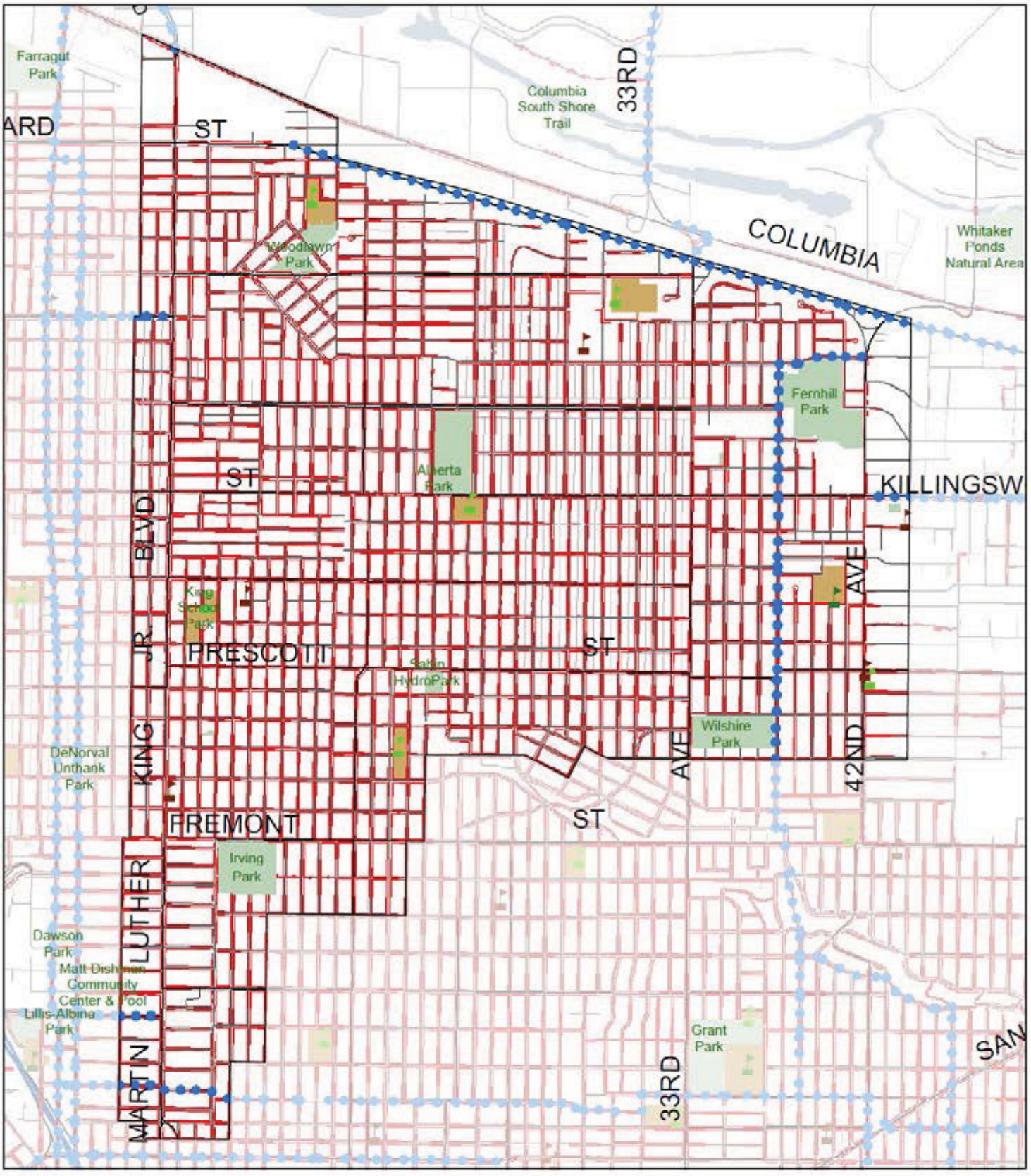
MLK-Alberta Analysis Area



Sidewalks and Bicycle Infrastructure

February 1, 2012

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

Public HS
Public K-8
Private Schools

NORTH

0 1,000 2,000 3,000 Feet

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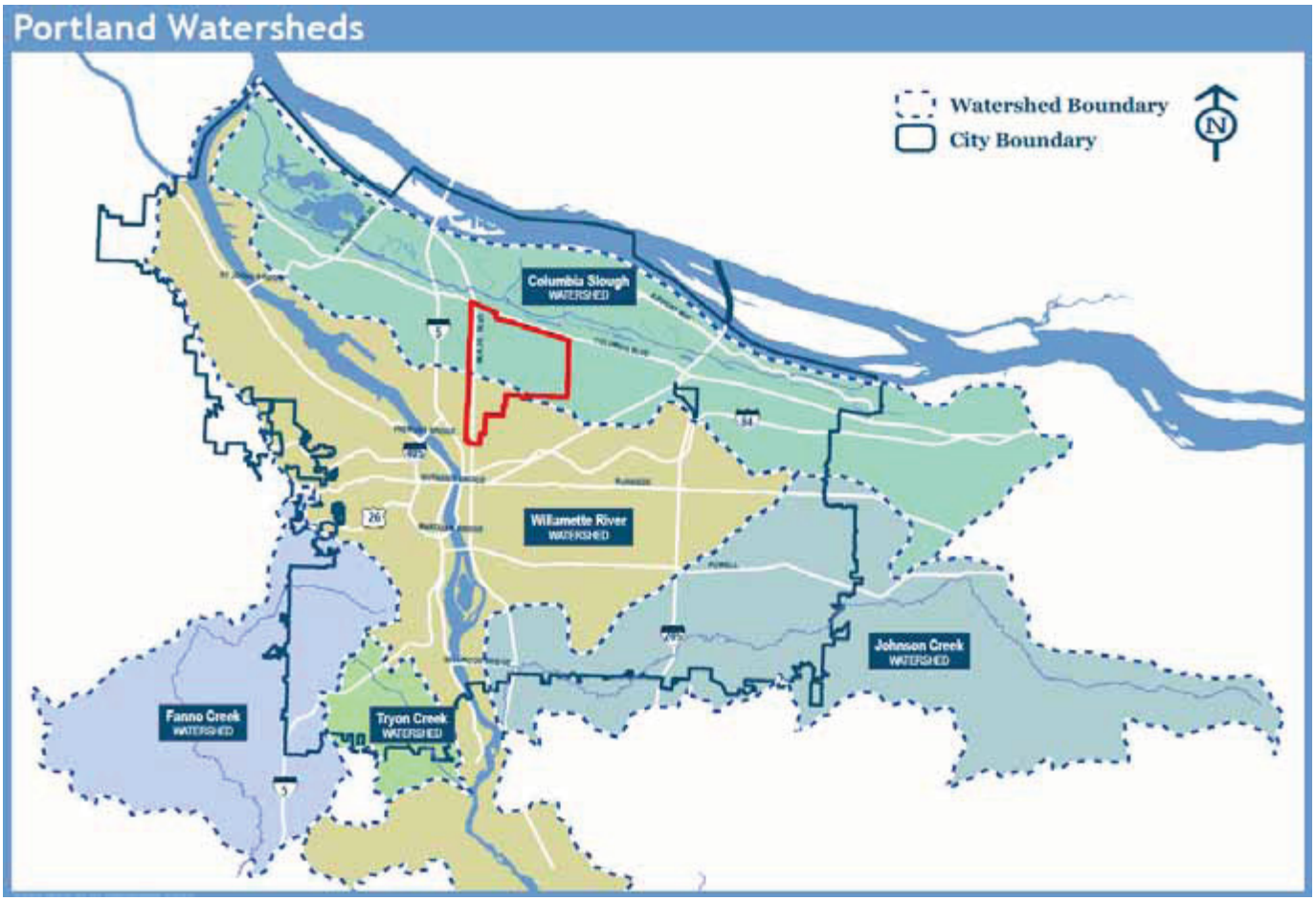
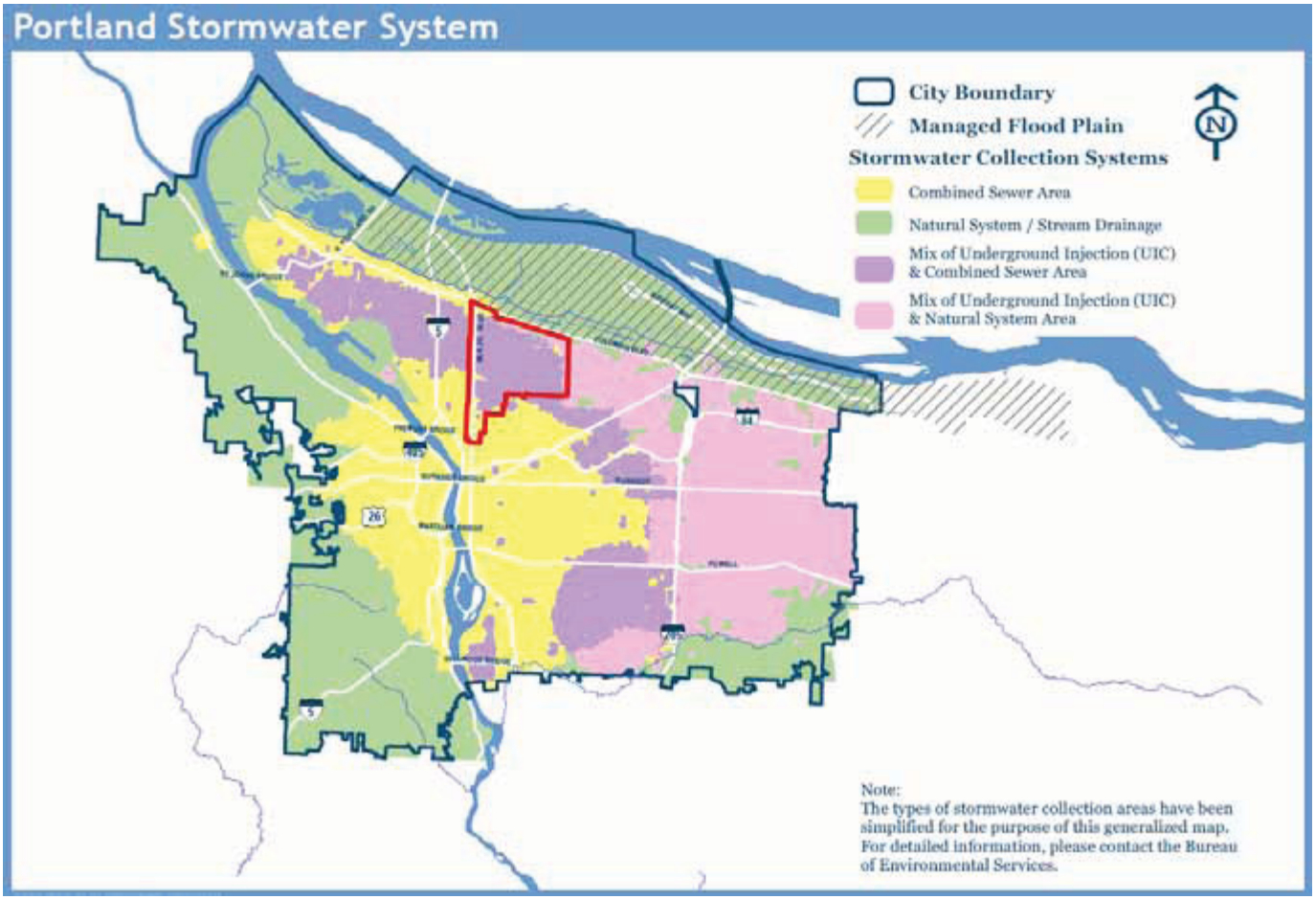
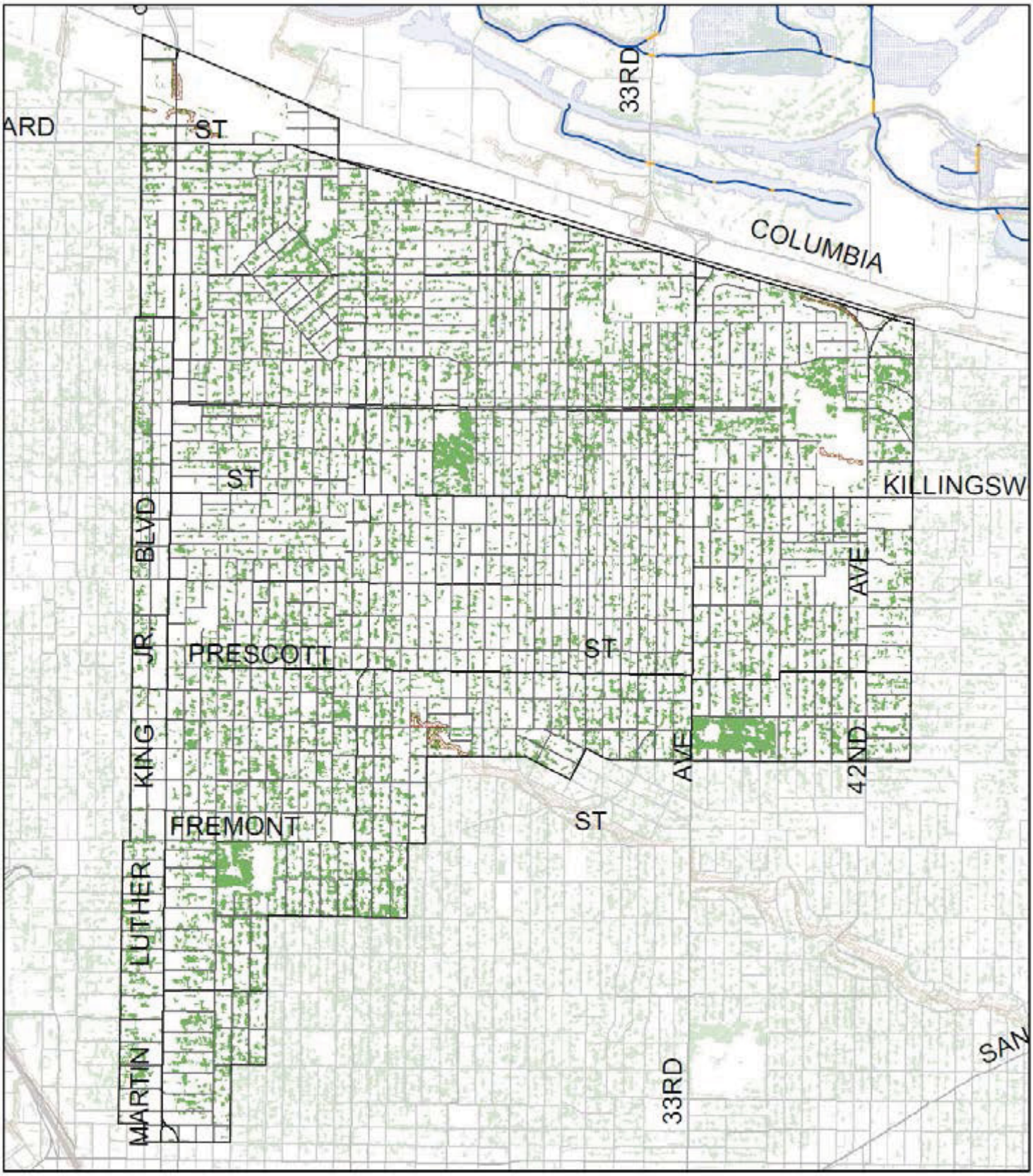
Portland Watersheds



Portland Stormwater System



MLK-Alberta Analysis Area



Watersheds and Natural Features

Slope Hazard
High Structure Vegetation
FEMA 100-year floodplain
Waterbodies
Open channel stream
Piped/culverted stream
City Boundary

NORTH

0 1,000 2,000 3,000 Feet

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February 1, 2012

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MLK-Alberta Analysis Area
Demographics (2000 – 2010)

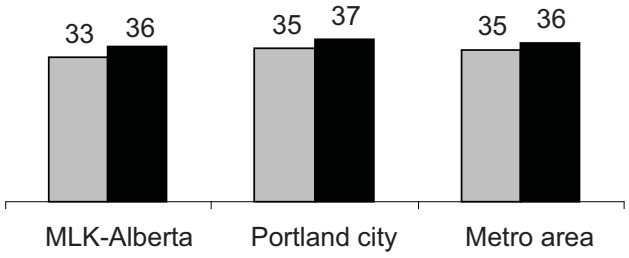
ESRI Business Analyst and US Census 2010 (except as noted)

Population

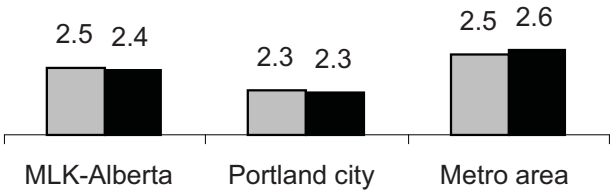
	MLK-Alberta	Portland city	Metro area
2010	33,696	583,776	2,226,009
2000	33,241	529,121	1,927,881
% change	1%	10%	15%

2000 2010

Median Age

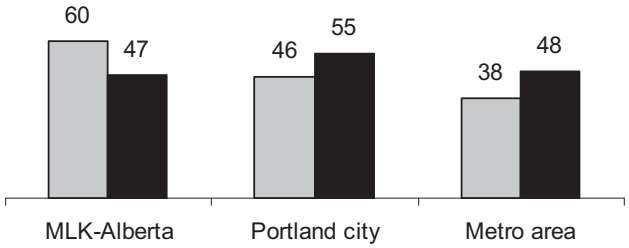


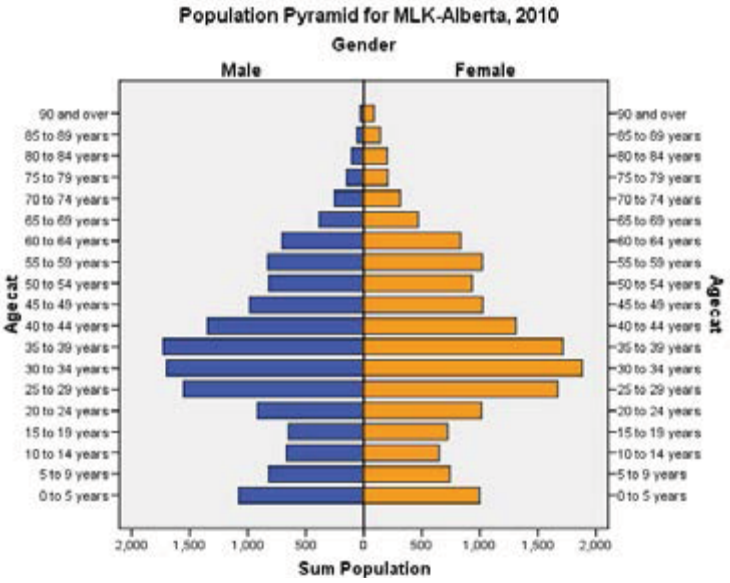
Average Household Size

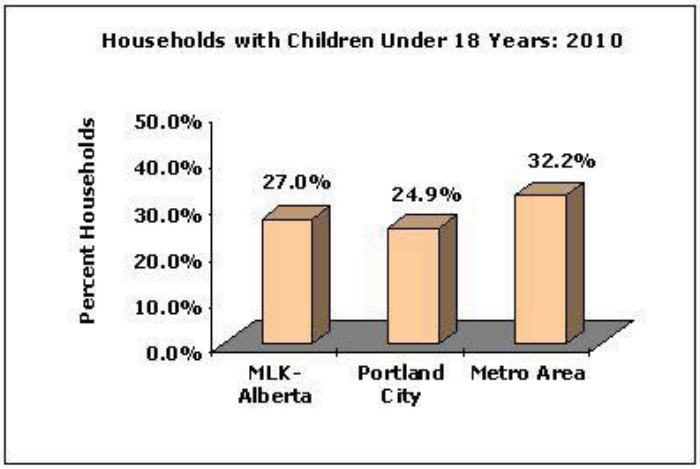


Diversity Index

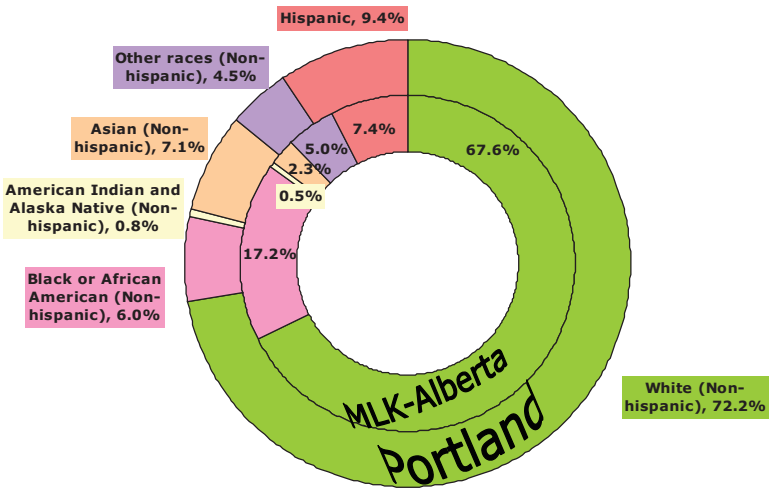
(Measures the likelihood that two persons, chosen at random fron



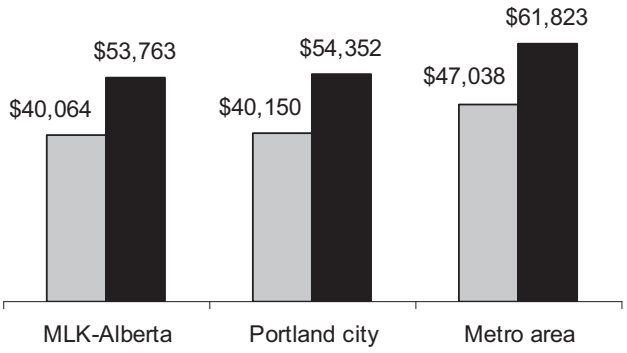


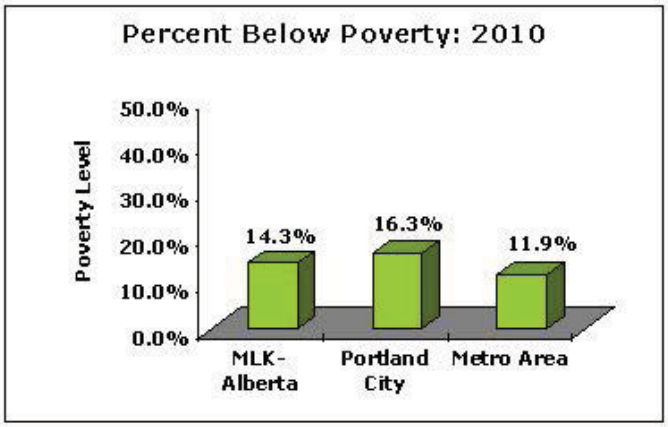


Racial and Ethnic Distribution in Portland vs. MLK-Alberta



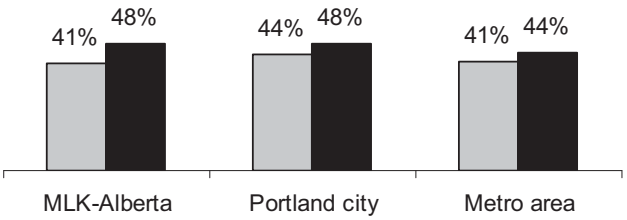
Median Household Income



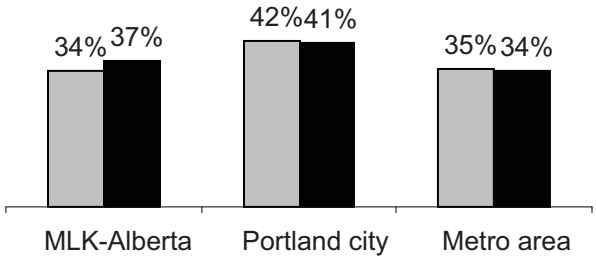


ACS 2006-2010

Percent College Graduates



Percent Renters of Occupied Housing Units



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% change	60.3%	63.6%	62.5%

MLK-Alberta Analysis Area
Commercial Real Estate Indicators

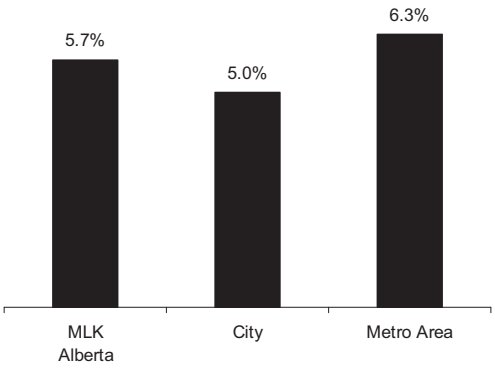
Retail and Commercial Real Estate data through 9-16-2010
Source: COSTAR

RETAIL

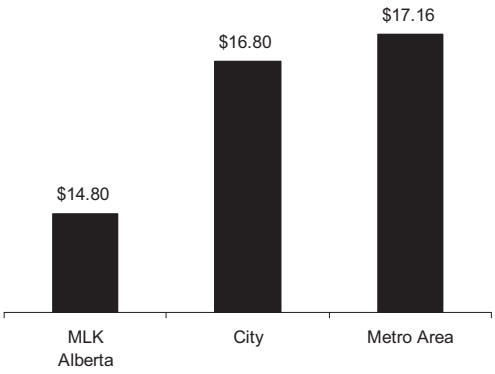
Square Feet

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

Retail Vacancy



Retail Rents



OFFICE SPACE

Square Feet

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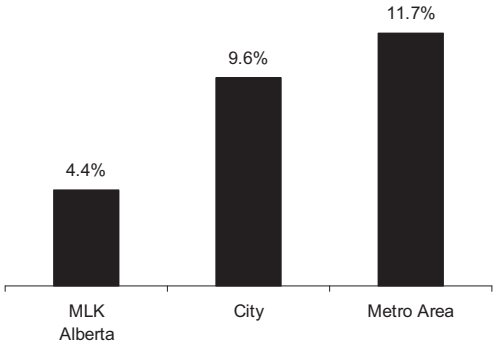
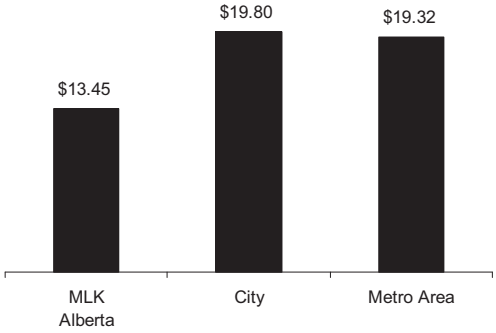
Office Vacancy



Office Rents

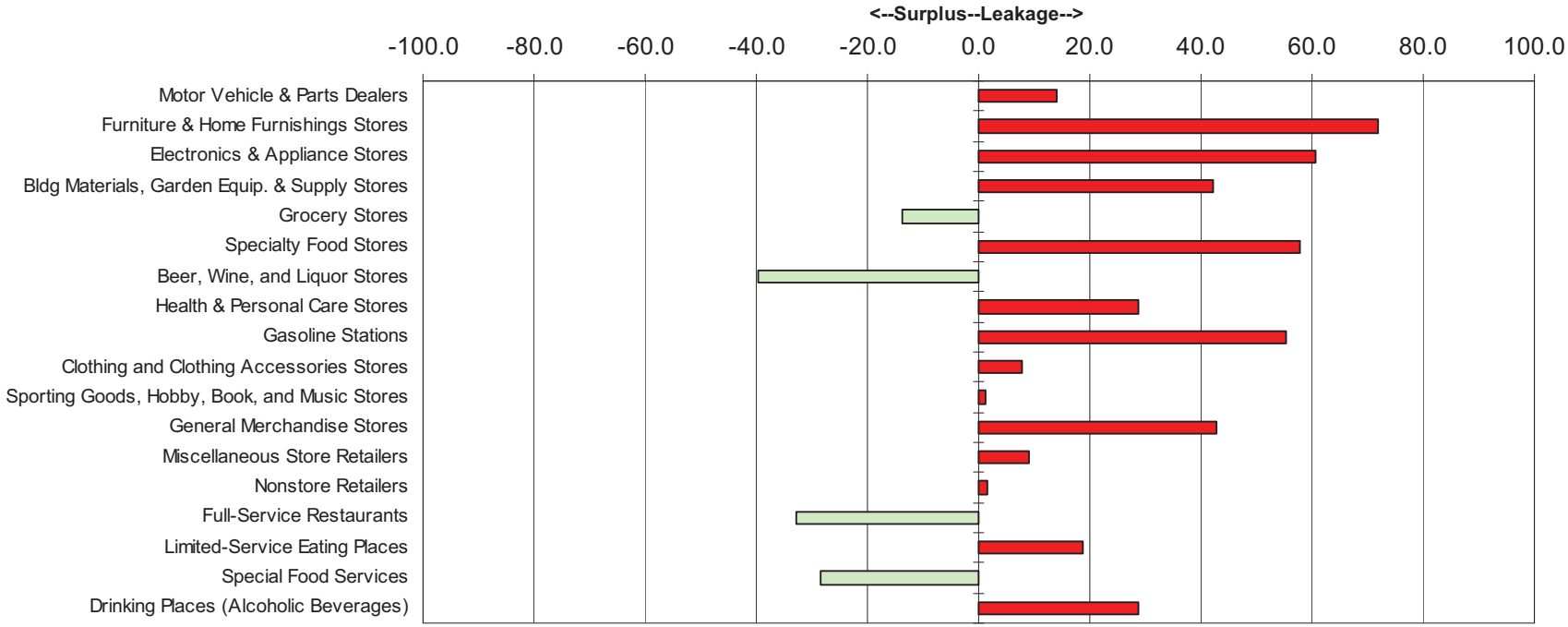


MLK-Alberta Analysis Area
Retail Market Profile

Retail Gap = $77 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 the difference between the potential spending in an area, based on population, 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." (Source: ESRI Business Analyst)



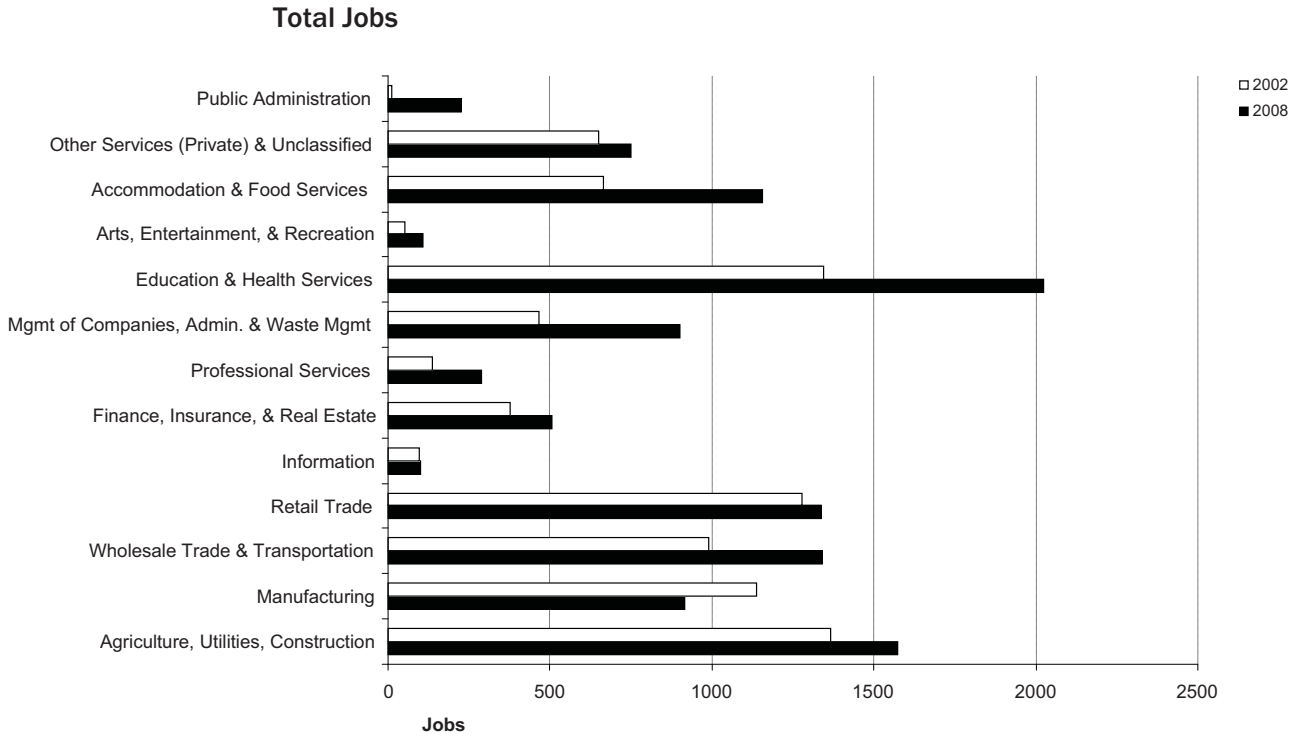
MLK-Alberta Analysis Area
Employment

Quarterly Census of Employment and Wages data for 2002 & 2008
Source: Oregon Employment Department (OED)

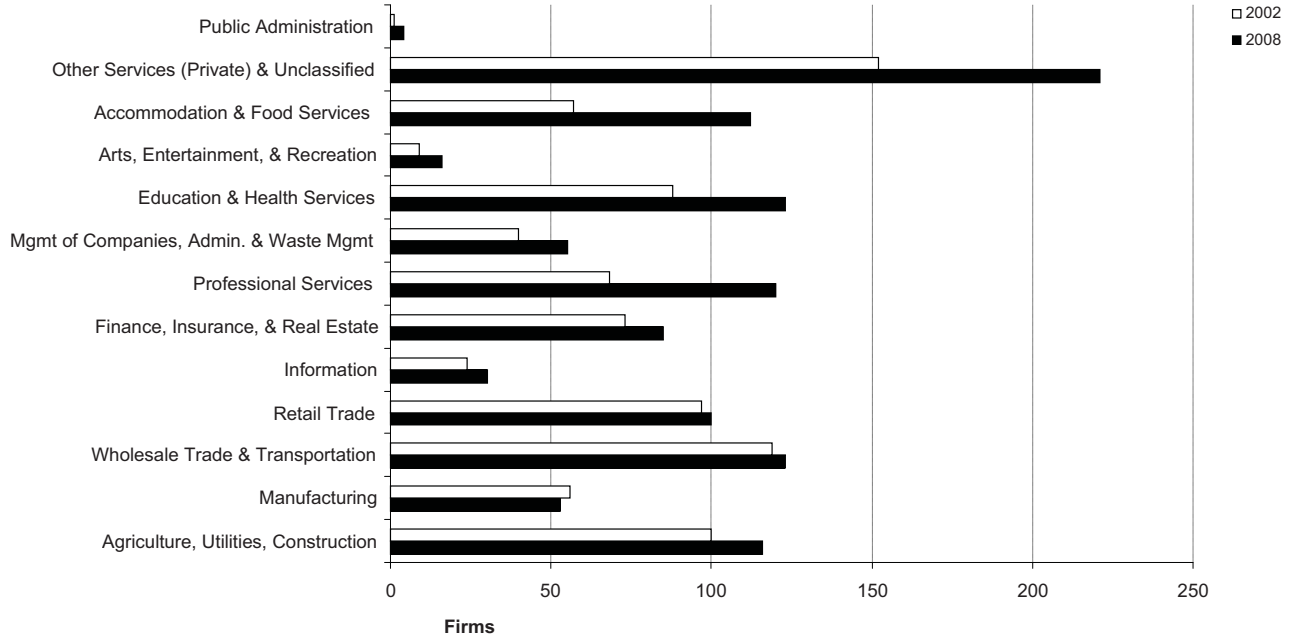
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

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 Firms



Average Annual Wages