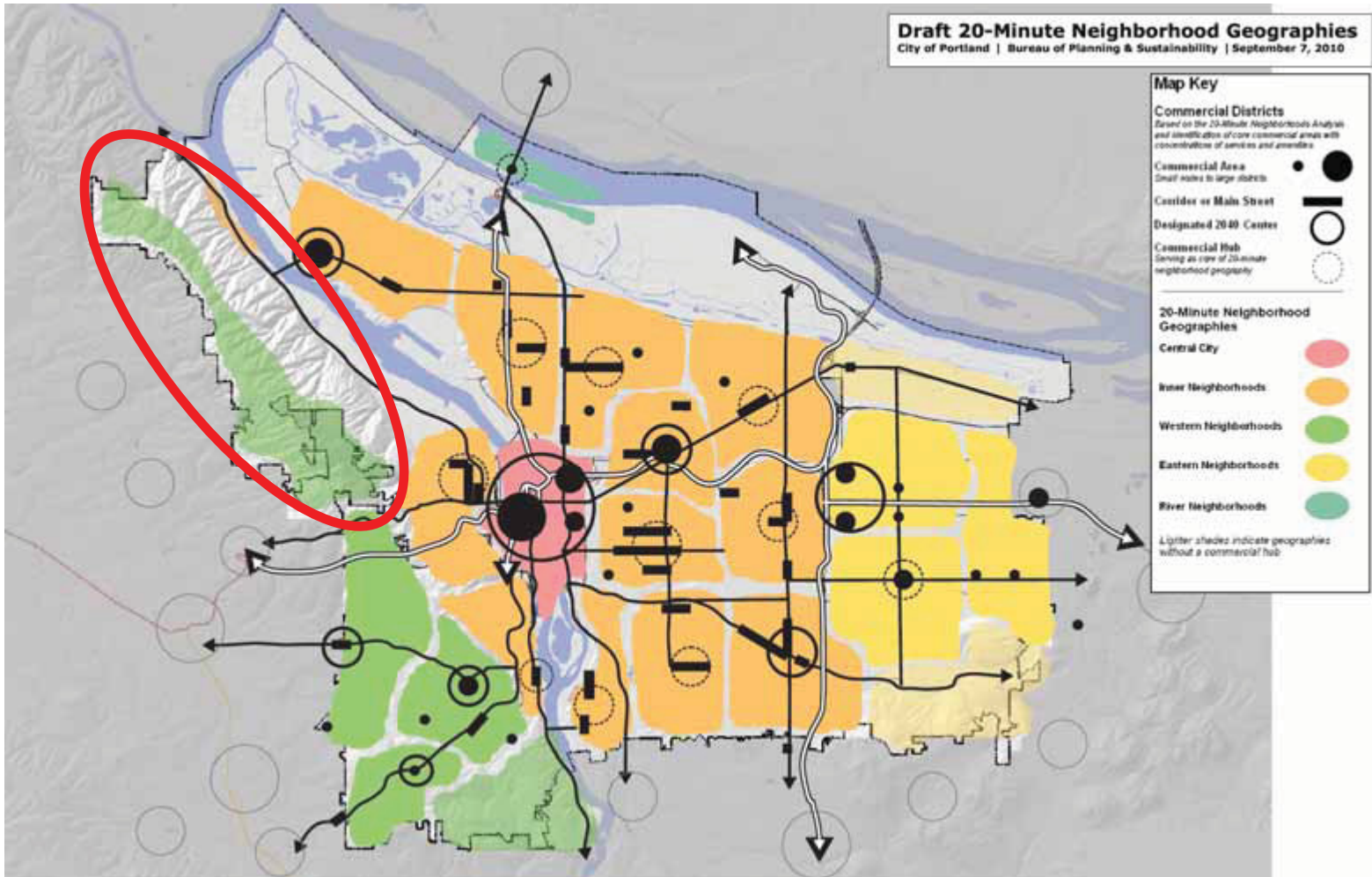


# Forest Park-Northwest Hills Analysis Area

Including Forest Park, Northwest Heights, and Linnton 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.*

# Forest Park-Northwest Hills Analysis Area

## Services and Amenities

Population: 8,400 people (3,200 households)  
 Land Area: 15.9 sq. miles (500 people per sq. mile)

### Commercial Districts

The area has no major concentrations of commercial services. There is a small cluster of commercial services in Linnton, along St. Helens Road (Highway 30). Nearby commercial districts include St. Johns (just to the east of the analysis area across the St. Johns Bridge), the Northwest District (at the southeast edge of the analysis area, but separated from populated areas by parkland and the West Hills), and commercial areas in Washington County.

**Grocery stores:** None

**Retail gap:** \$155 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*:                         | 12% |
| Within 1/2 mile of a public elementary school:      | 7%  |
| Within 3 miles of a full-service community center*: | 5%  |
| Within 1/2 mile of a full-service grocery store:    | 0%  |
| Within 1/4 mile of a frequent service transit stop: | 0%  |

*\*Parks Bureau service standard*

**Community Centers:** None

**Libraries:** None

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

**Tree Canopy Coverage:** 81%

**Public Schools:** 1 elementary school (Forest Park Elementary)

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None

**Walkable Access Score:** 7 (out of 100)

*(from 20-Minute Neighborhoods Analysis Index)*

### Neighborhood and Business Associations

**Neighborhood Associations:** Forest Park, Northwest Heights, and Linnton

**Business Associations:** Northwest Industrial Neighborhood Association

**Urban Form Characteristics**

Located in the West Hills (Tualatin Mountains), this area is characterized by hilly topography, forested slopes, ravines and streams. Most of the area is not developed at an urban level, with a large portion of the area occupied by Forest Park. The largest developed area is the Forest Heights neighborhood, where curvilinear streets follow the topography. Most streets outside Forest Heights do not have sidewalks. A very small portion of the area, in Linnton, features a street grid.

**Access issues.** Most of the area lacks street connectivity and continuous sidewalks. The area has a relatively small population base and a low density of development. It is served by few commercial or community services and has very limited transit service. Topographical features and infrequent street connections limit access to adjacent areas.

**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: | 0 |

**Zoning**

|                            | <b>Acres</b> | <b>% of Land Area</b> | <b>Buildable Acres*</b> |
|----------------------------|--------------|-----------------------|-------------------------|
| Single-Family Residential: | 2,798        | 37%                   | 441                     |
| Multi-Family Residential:  | 46           | .6%                   | 3                       |
| Commercial/Mixed-Use:      | 5            | .1%                   | 2                       |
| Employment:                | 0            | 0%                    | 0                       |
| Industrial:                | 88           | 1%                    | 2                       |
| Open Space:                | 4,657        | 61%                   | NA                      |

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

**Anticipated Growth by 2035**

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

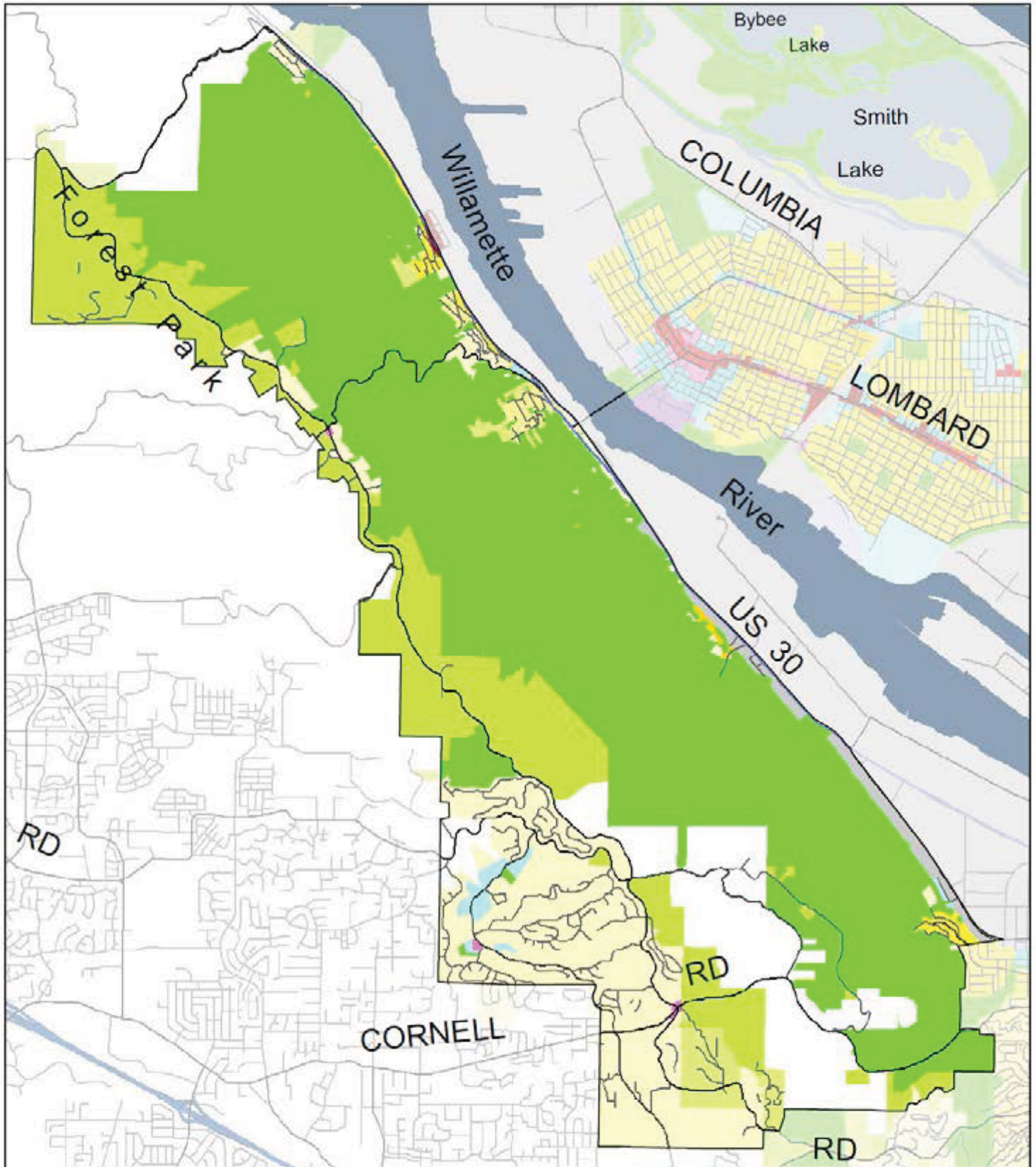
|                              |       |
|------------------------------|-------|
| 2010 Housing Units (Census): | 3,355 |
| 2035 Housing Units:          | 4,400 |

**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                         |

# Forest Park-Northwest Hills 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 |    |



0 1,500 3,000 4,500 Feet

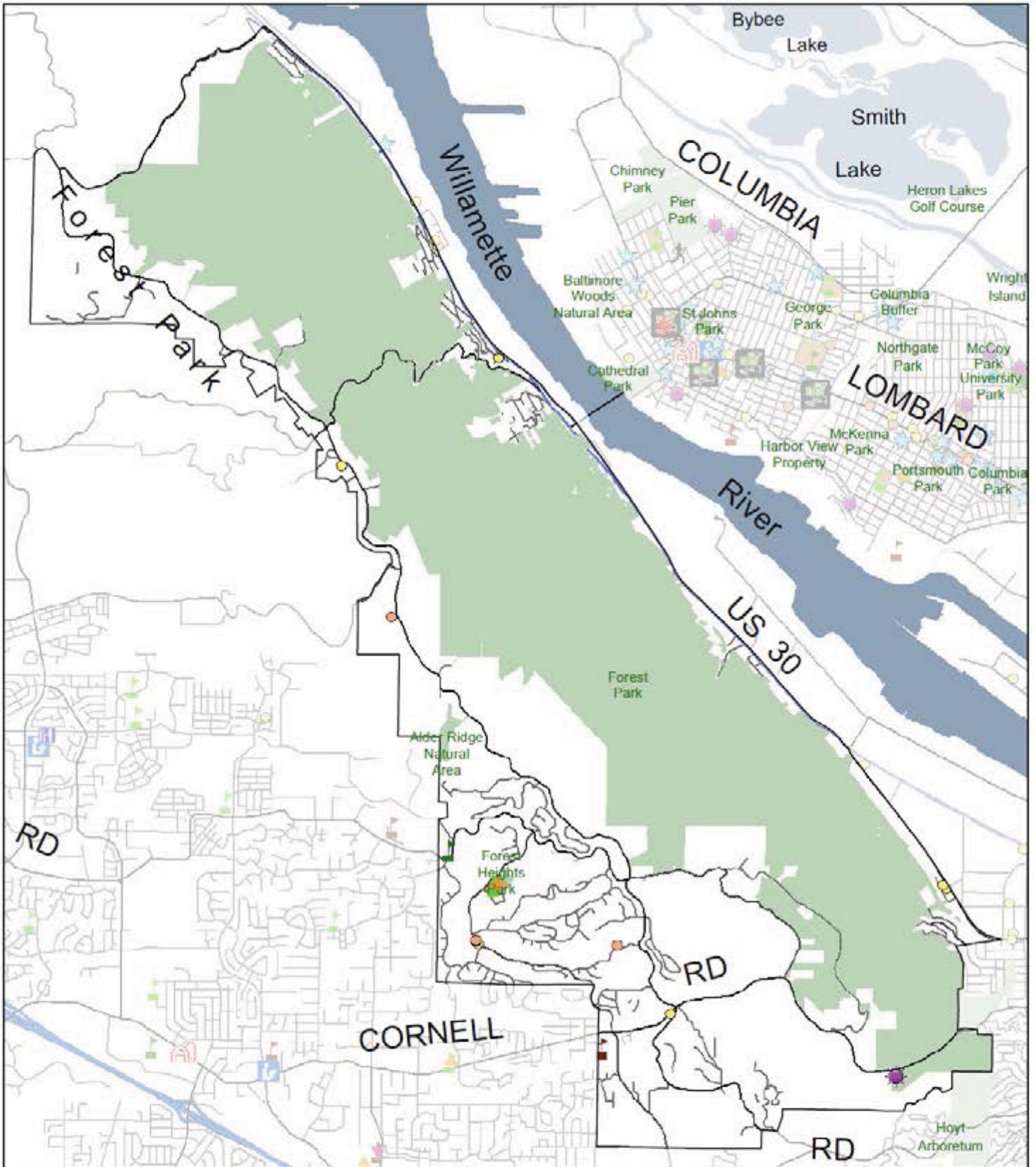


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Sam Adams, Mayor • Susan Anderson, Director

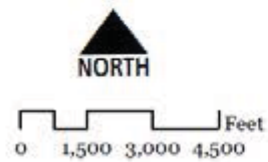
# Forest Park-Northwest Hills Analysis Area



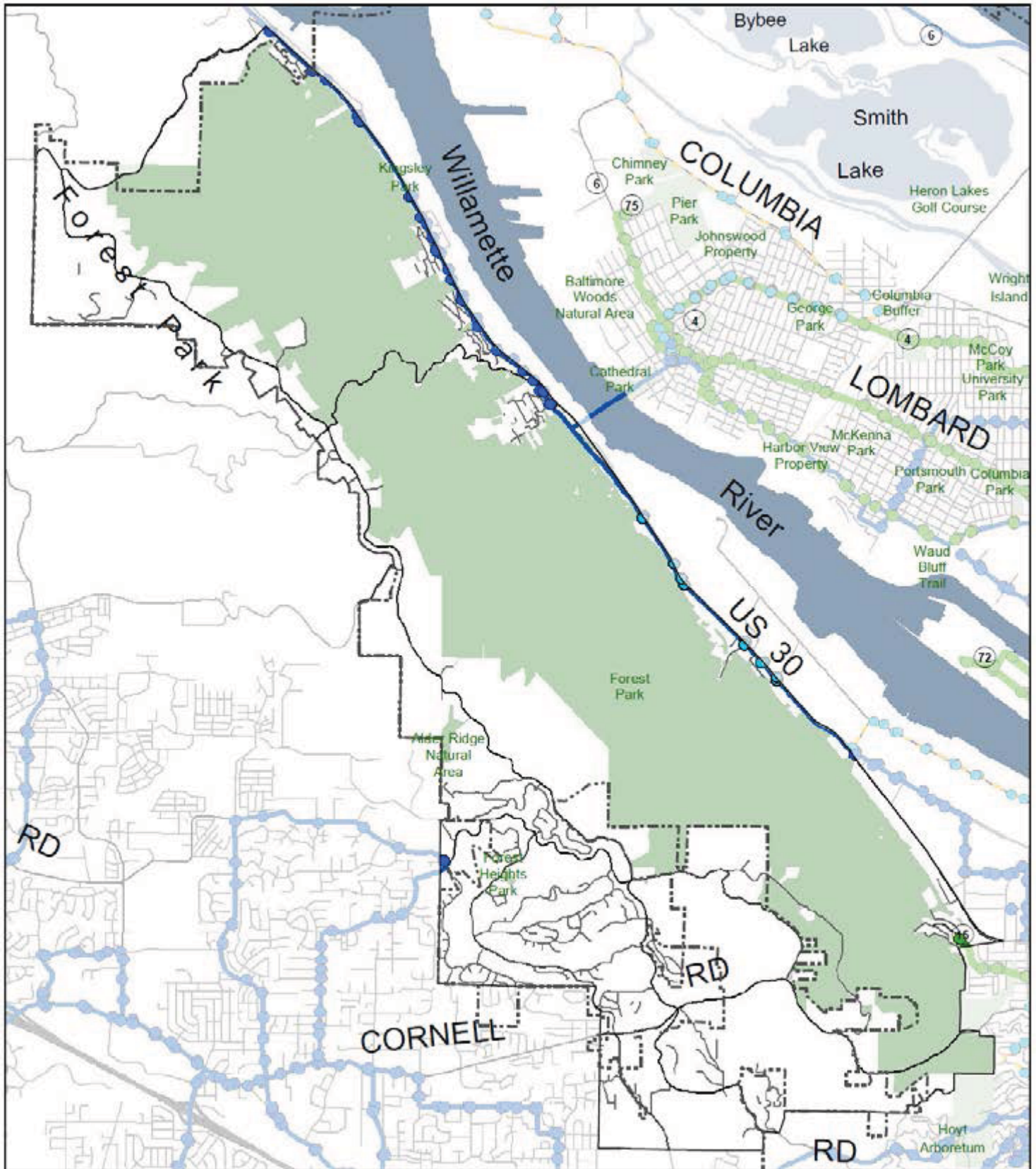
## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

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



# Forest Park-Northwest Hills Analysis Area

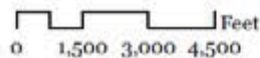


## Transit Infrastructure

February 1, 2012

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- | Light Rail Stops | Bus Stops              |
|------------------|------------------------|
| MAX              | Frequent Stops         |
| Street Car       | Standard Stops         |
| MAX Streetcar    | Rush Hour Stops        |
|                  | Frequent Service       |
|                  | Standard Service       |
|                  | Rush-Hour Only Service |
|                  | City Boundary          |

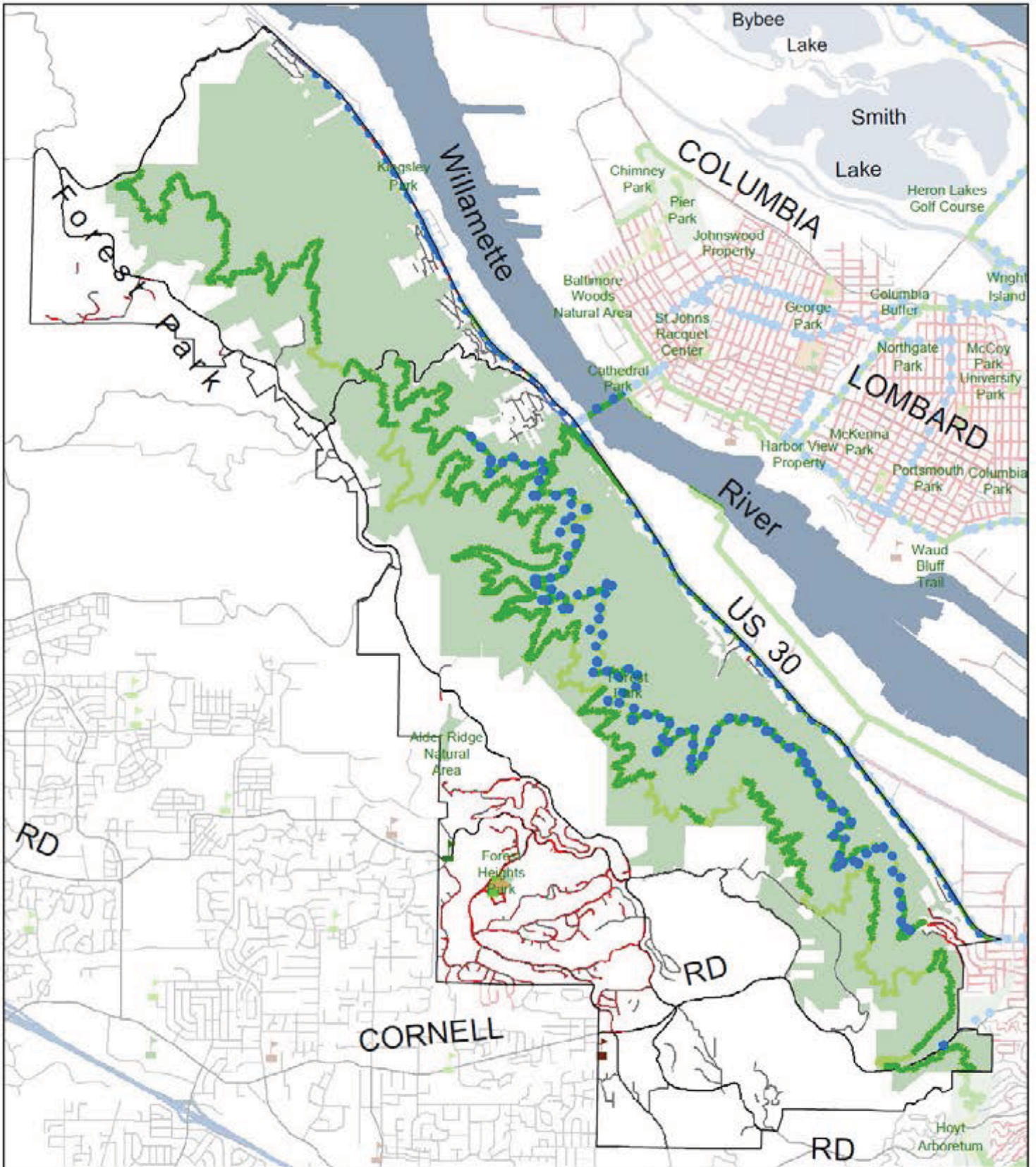


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Ben Adams, Mayor • Jason Anderson, Director

# Forest Park-Northwest Hills Analysis Area

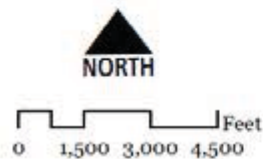


## Sidewalks and Bicycle Infrastructure

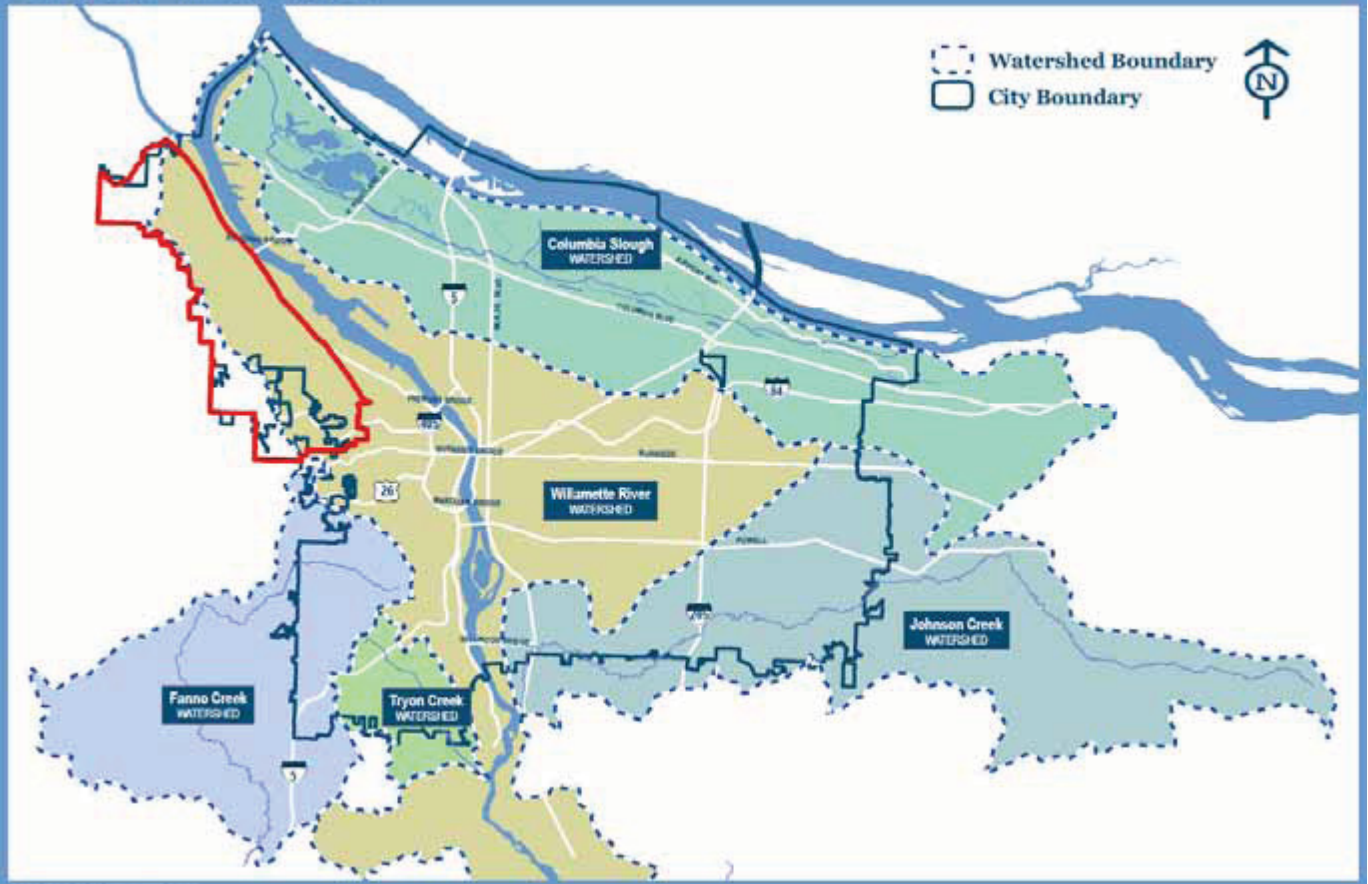
February 1, 2012

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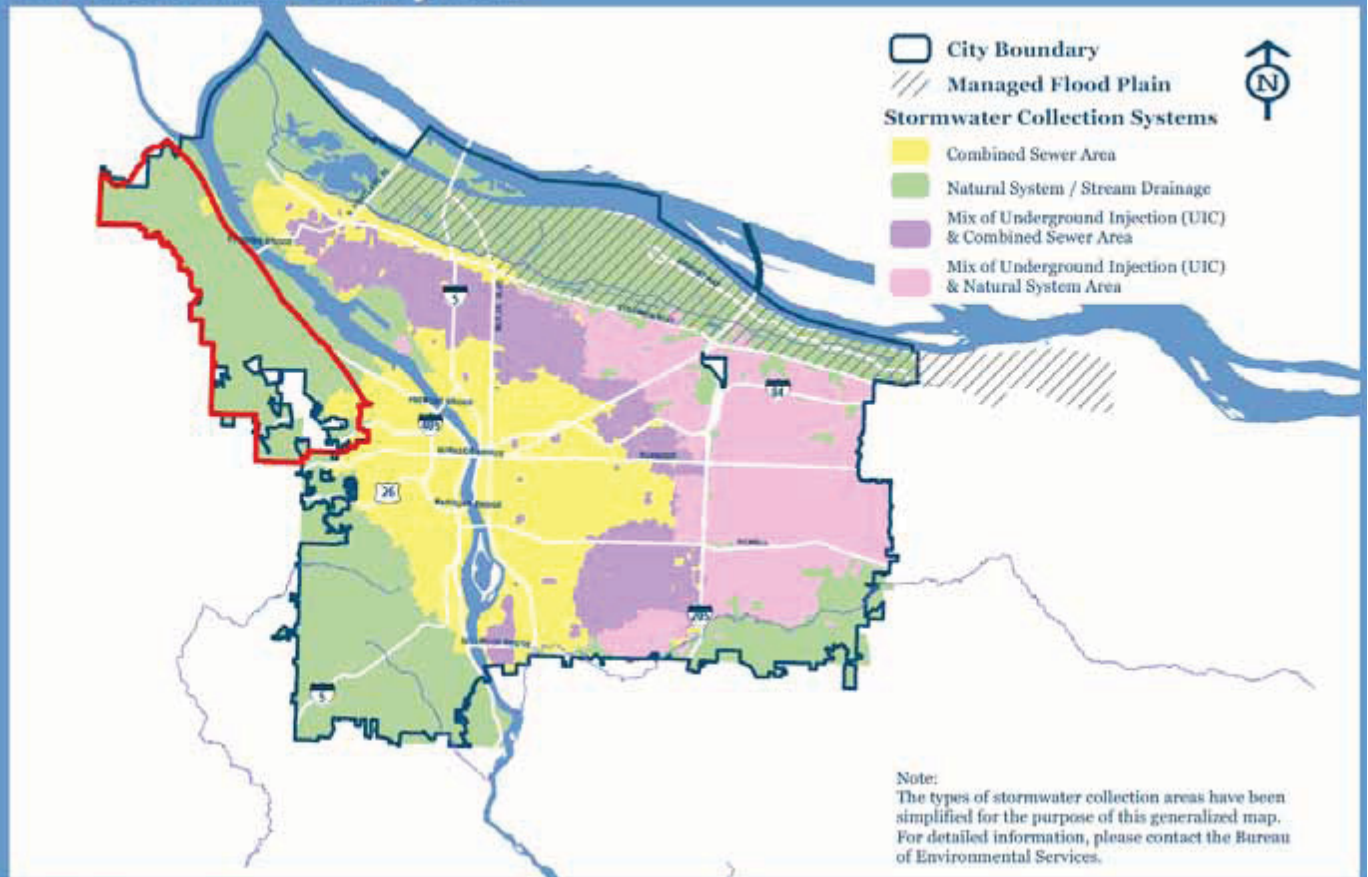
- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



## Portland Watersheds

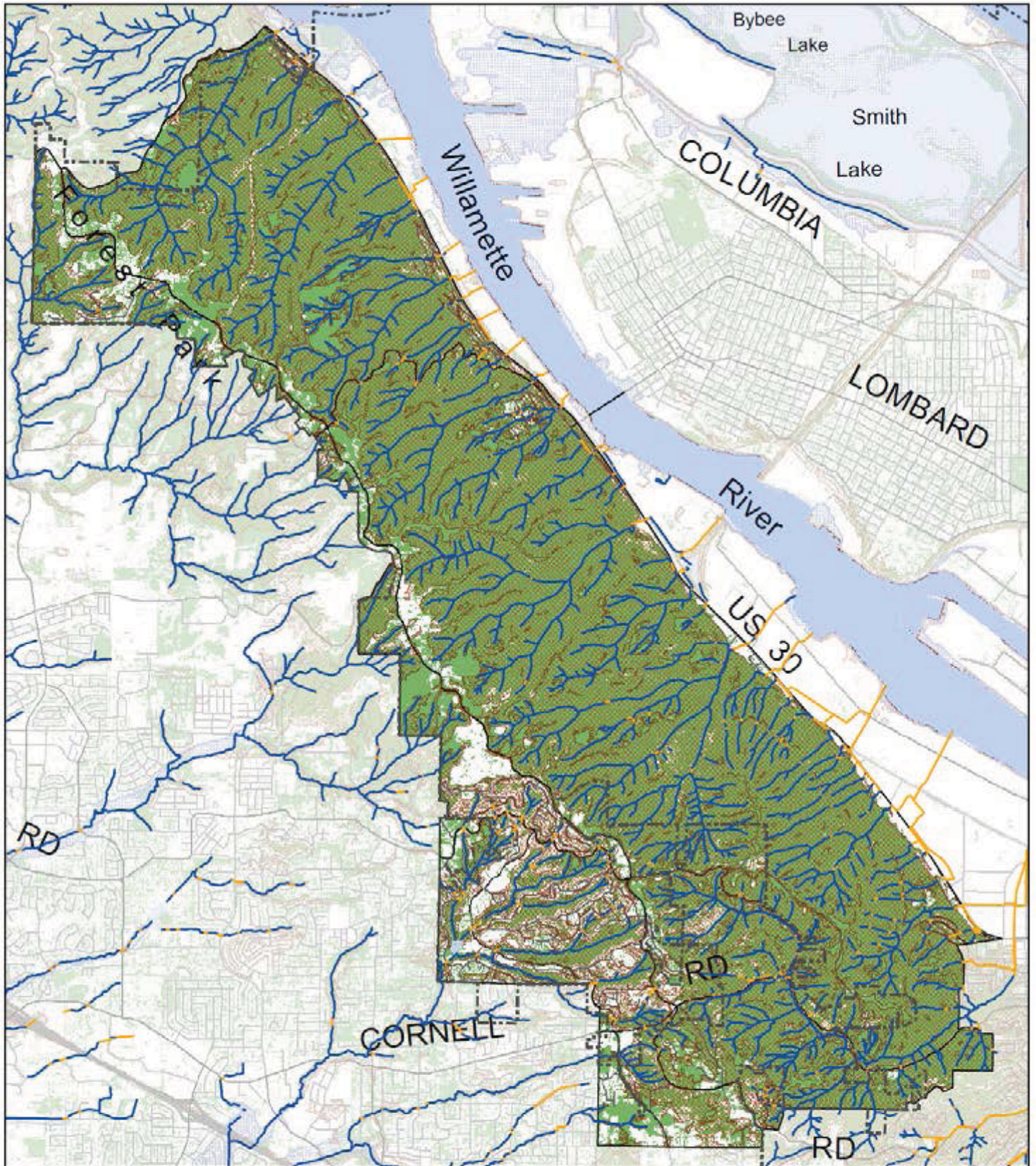


## Portland Stormwater System





# Forest Park-Northwest Hills Analysis Area

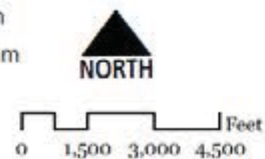


## Watersheds and Natural Features

February 1, 2012

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



# Forest Park-Northwest Hills Analysis Area

## Demographics (2000 – 2010)

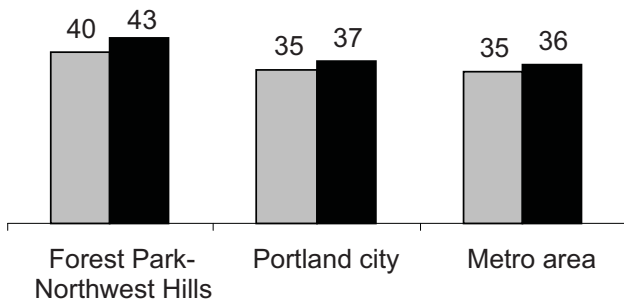
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

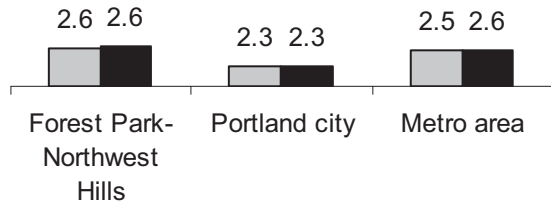
|          | Forest Park-Northwest Hills | Portland city | Metro area |
|----------|-----------------------------|---------------|------------|
| 2010     | 8,379                       | 583,776       | 2,226,009  |
| 2000     | 5,279                       | 529,121       | 1,927,881  |
| % change | 59%                         | 10%           | 15%        |

2000 2010

### Median Age

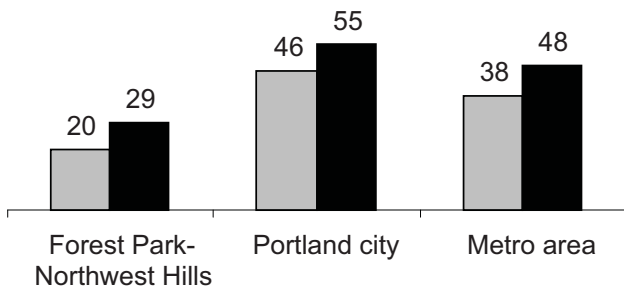


### Average Household Size

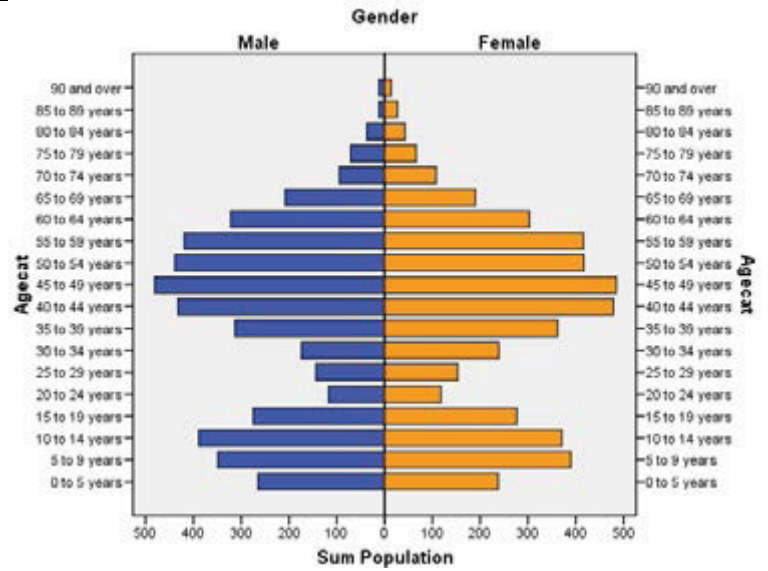


### Diversity Index

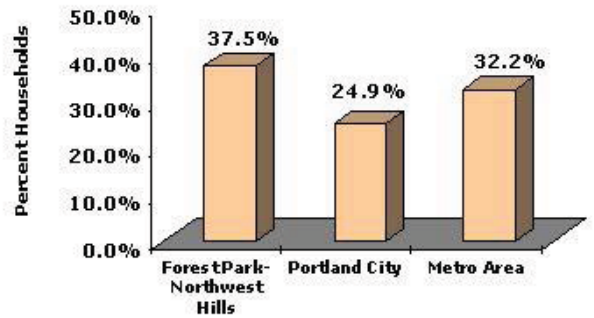
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



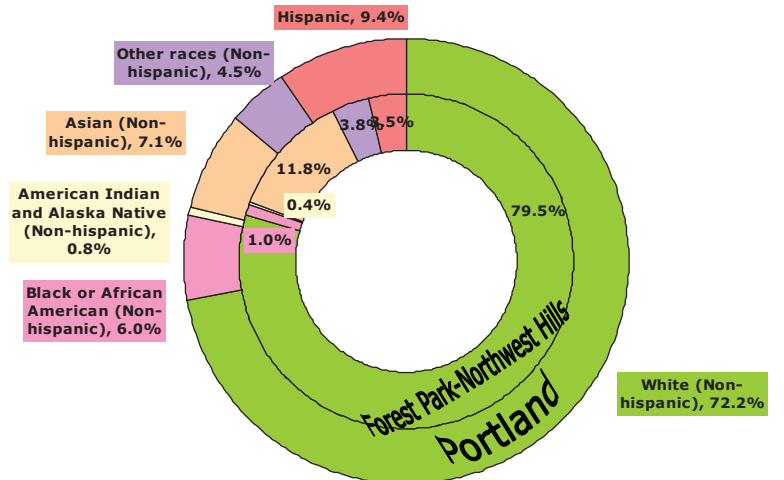
Population Pyramid for Forest Park-Northwest Hills, 2010



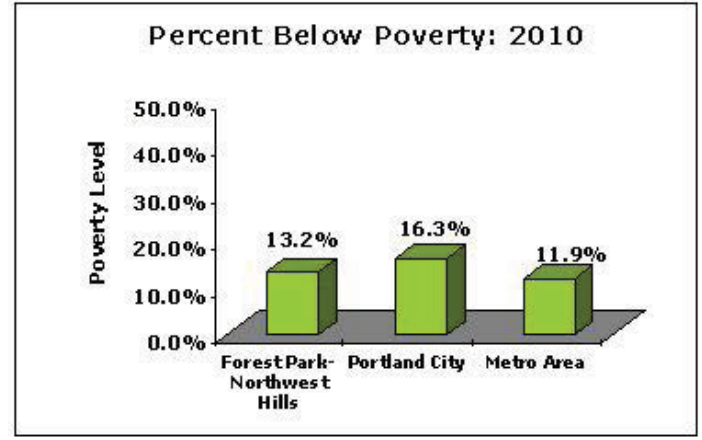
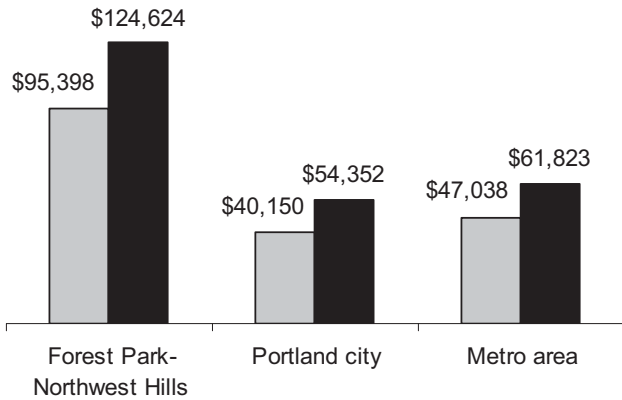
Households with Children Under 18 Years: 2010



Racial and Ethnic Distribution in Portland vs. Forest Park-Northwest Hills

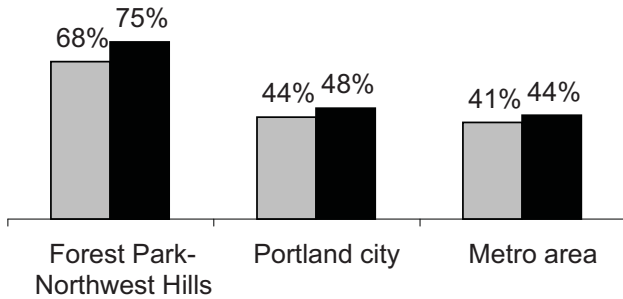


### Median Household Income

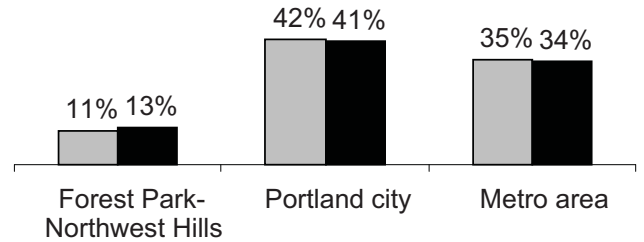


ACS 2006-2010

### Percent College Graduates



### Percent Renters of Occupied Housing Units



### Median Home Value

|          | Forest Park-Northwest Hills | Portland city | Metro area |
|----------|-----------------------------|---------------|------------|
| 2010     | \$655,858                   | \$253,184     | \$273,500  |
| 2000     | \$390,149                   | \$154,721     | \$168,347  |
| % change | 68.1%                       | 63.6%         | 62.5%      |

# Forest Park-Northwest Hills Analysis Area

## Commercial Real Estate Indicators

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

### RETAIL

#### Square Feet

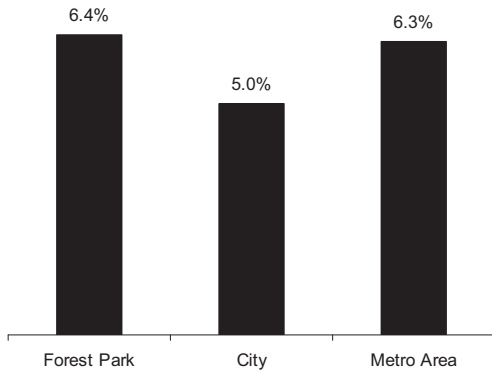
| Forest Park | City       | Metro Area  |
|-------------|------------|-------------|
| 35,154      | 51,937,895 | 107,875,146 |

### OFFICE SPACE

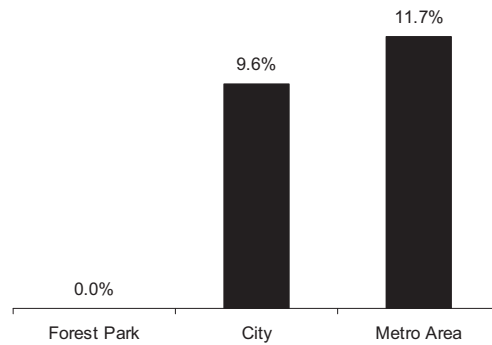
#### Square Feet

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

#### Retail Vacancy



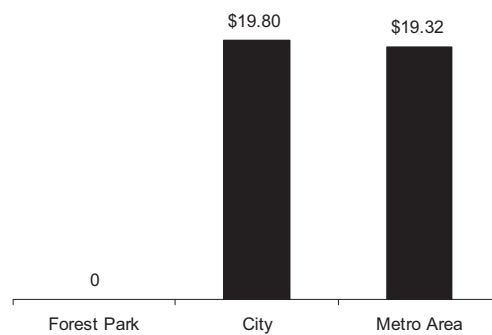
#### Office Vacancy



#### Retail Rents



#### Office Rents



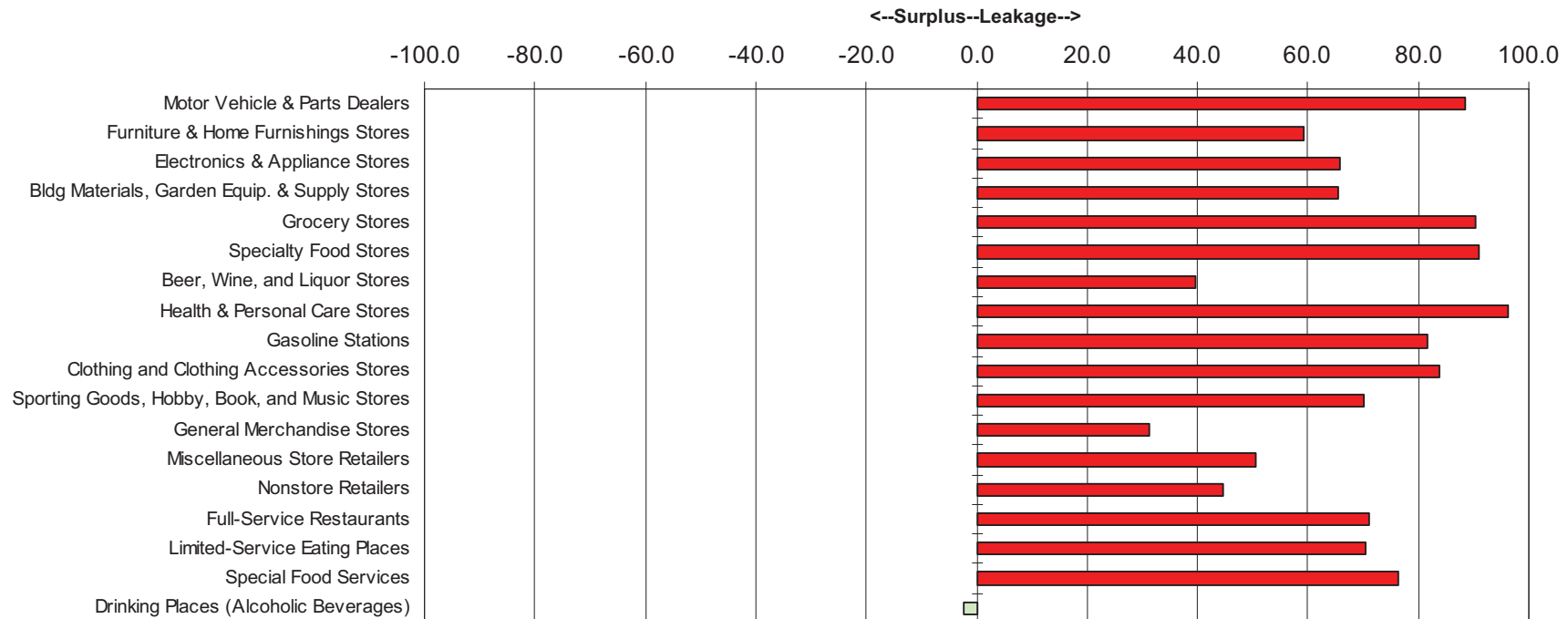
# Forest Park-Northwest Hills Analysis Area

## Retail Market Profile

**Retail Gap = \$155 million**

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

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)



# Forest Park-Northwest Hills Analysis Area

## Employment

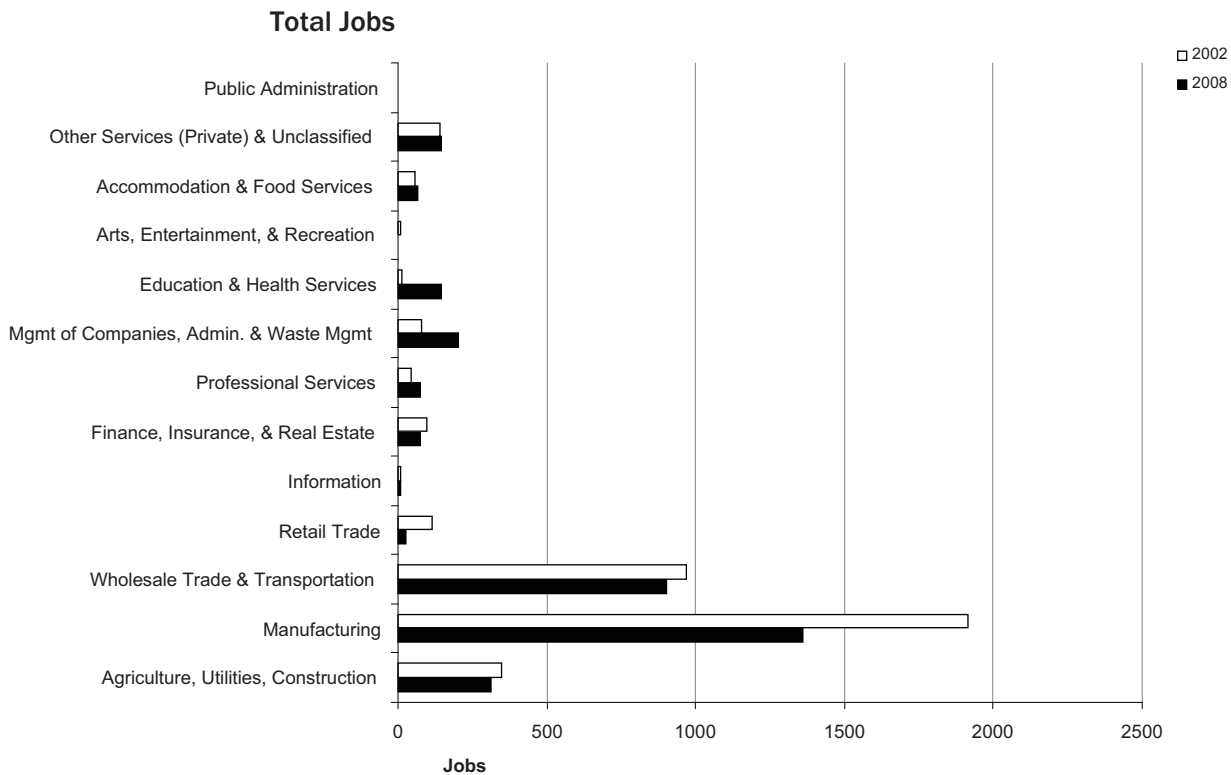
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

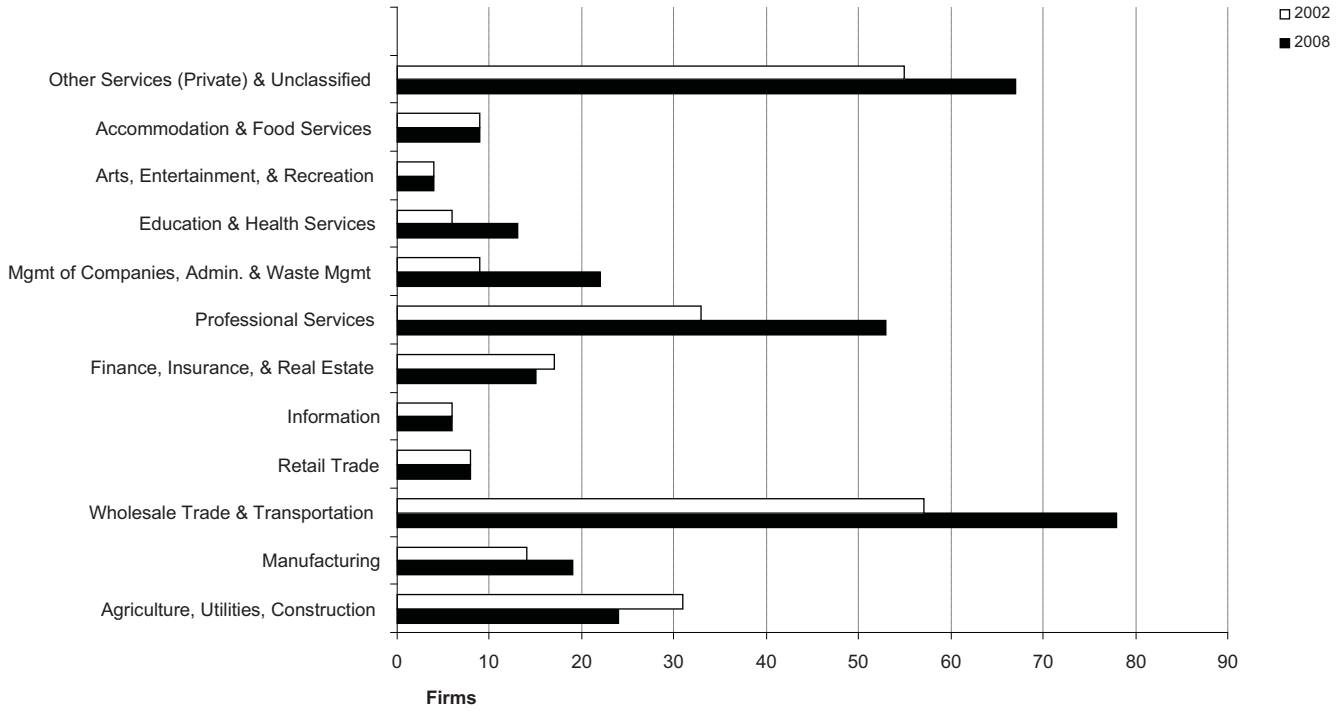
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

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

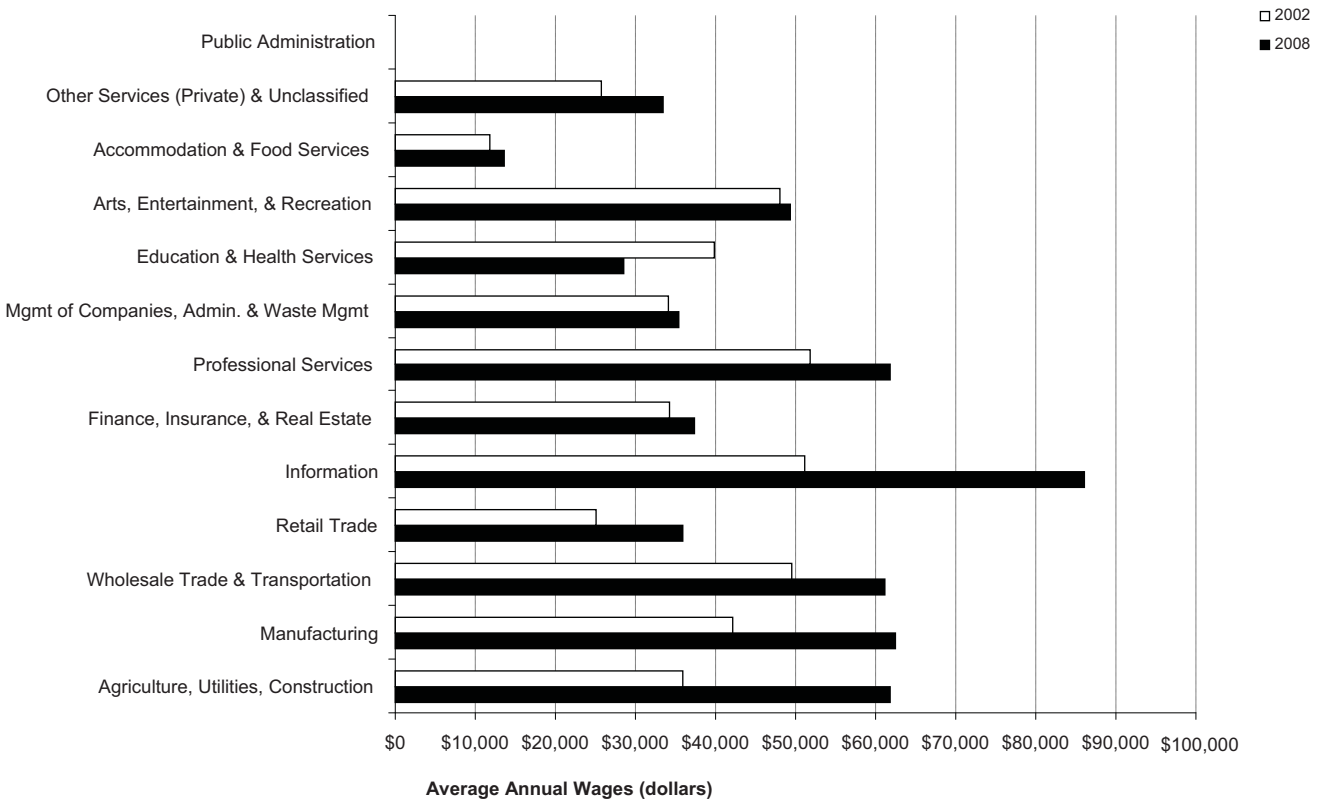
|                      | 2002     | 2008     | change  |
|----------------------|----------|----------|---------|
| Total Jobs           | 3,800    | 3,329    | - 471   |
| Total Firms          | 249      | 318      | +69     |
| Average Annual Wages | \$41,581 | \$56,133 | +14,552 |



### Total Firms



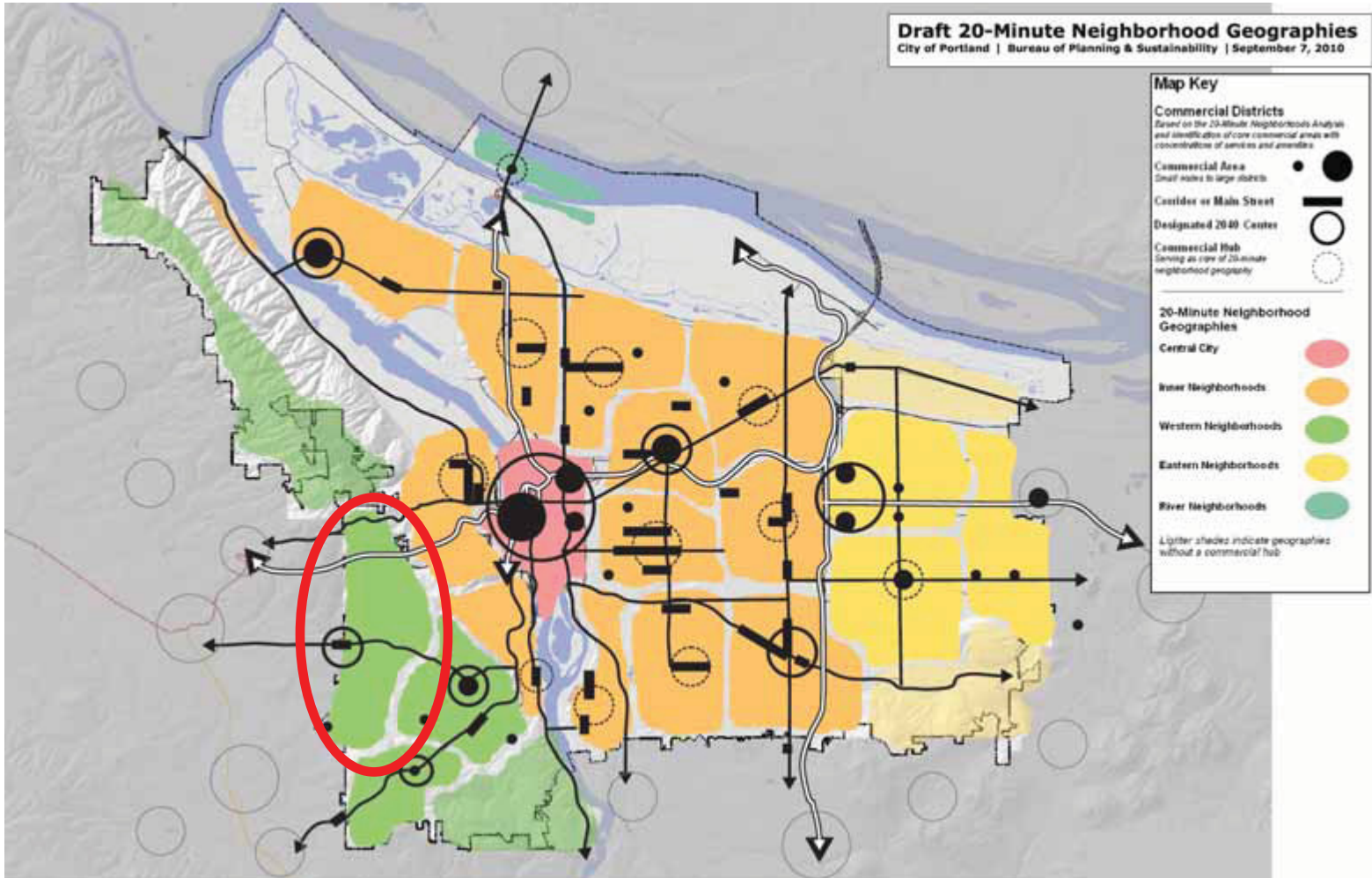
### Average Annual Wages



# Raleigh Hills Analysis Area

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

## Services, Demographics and Market Summary



### 20-Minute Neighborhoods Analysis

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.*



# Raleigh Hills Analysis Area

## Services and Amenities

Population: 16,300 people (7,000 households)  
Land Area: 5.2 sq. miles (3,000 people per sq. mile)

### Commercial Districts

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

**Grocery stores:** 3 (1 store per 2,333 households)

**Retail gap:** \$221 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) – Note that this figure does not take into account spending in the Raleigh Hills commercial area outside Portland.

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

|   |     |
|---|-----|
| Within 1/2 mile of a park*:                         | 56% |
| Within 1/2 mile of a public elementary school:      | 12% |
| Within 3 miles of a full-service community center*: | 88% |
| Within 1/2 mile of a full-service grocery store:    | 18% |
| Within 1/4 mile of a frequent service transit stop: | 7%  |

\*Parks Bureau service standard

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

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

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

**Tree Canopy Coverage:** 52%

**Public Schools:** 3 elementary schools (Bridlemile, Hayhurst and Maplewood\* elementary schools)

\*At edge of analysis area

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None

**Walkable Access Score:** 22 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

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

**Business Associations:** None

## Urban Form Characteristics

Natural features are prominent characteristics of this area, including Fanno Creek and smaller streams, ravines, forested slopes and gently-rolling hills. The area is composed primarily of residential neighborhoods, which include a mix of rectilinear blocks and curvilinear streets that follow the area’s hilly topography. Most streets do not have sidewalks. The area includes a small number of commercial areas, mostly auto-oriented and located along major roads.

**Access issues.** Most of the area lacks frequent street connectivity and most streets do not have sidewalks. Off-street trails provide additional pedestrian connections in some locations. The area’s limited number of commercial areas are beyond walking distance for most residents, and there are few options for accessing these areas other than major roads that lack continuous pedestrian facilities. The area has relatively low population densities and has limited transit service. Topography and other natural features also limit pedestrian and bicycle accessibility in the area.

### 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:   | 1 (Raleigh Hills Town Center – small portion in Portland, no adopted boundaries) |
| Main Streets:        | .2 mile (Garden Home Road – at Oleson)   |
| Station Communities: | 0  |

## Zoning

|                            | Acres | % of Land Area | Buildable Acres* |
|----------------------------|-------|----------------|------------------|
| Single-Family Residential: | 2,458 | 88%            | 614              |
| Multi-Family Residential:  | 109   | 4 %            | 27               |
| Commercial/Mixed-Use:      | 65    | 2%             | 38               |
| Employment:                | 0     | 0%             | 0                |
| Industrial:                | 0     | 0%             | 0                |
| Open Space:                | 160   | 6%             | NA               |

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

### Anticipated Growth by 2035

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

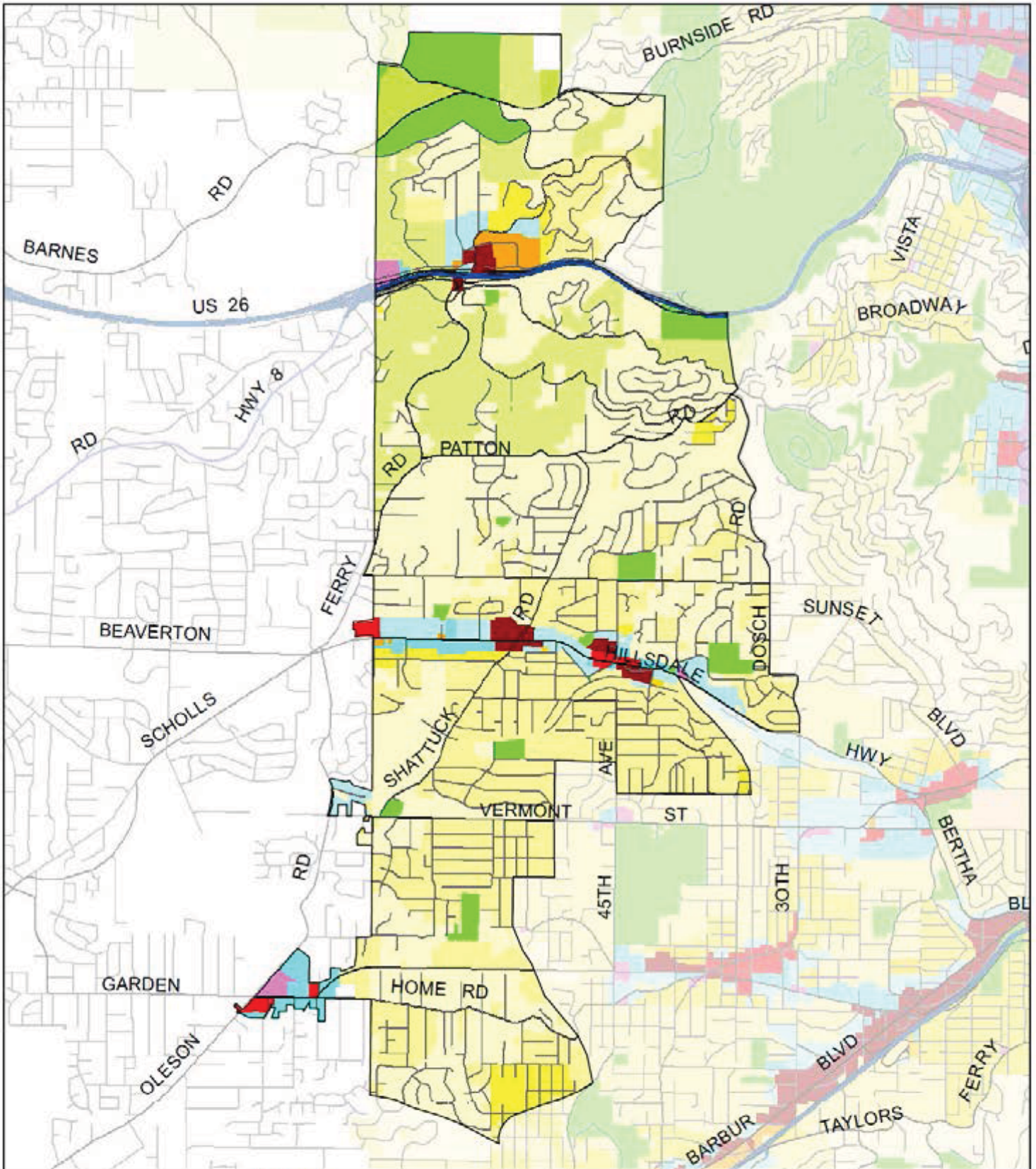
|                              |        |
|------------------------------|--------|
| 2010 Housing Units (Census): | 7,747  |
| 2035 Housing Units:          | 10,700 |

#### 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                         |

# Raleigh Hills Analysis Area



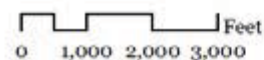
## Comprehensive Plan Designations

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 |    |

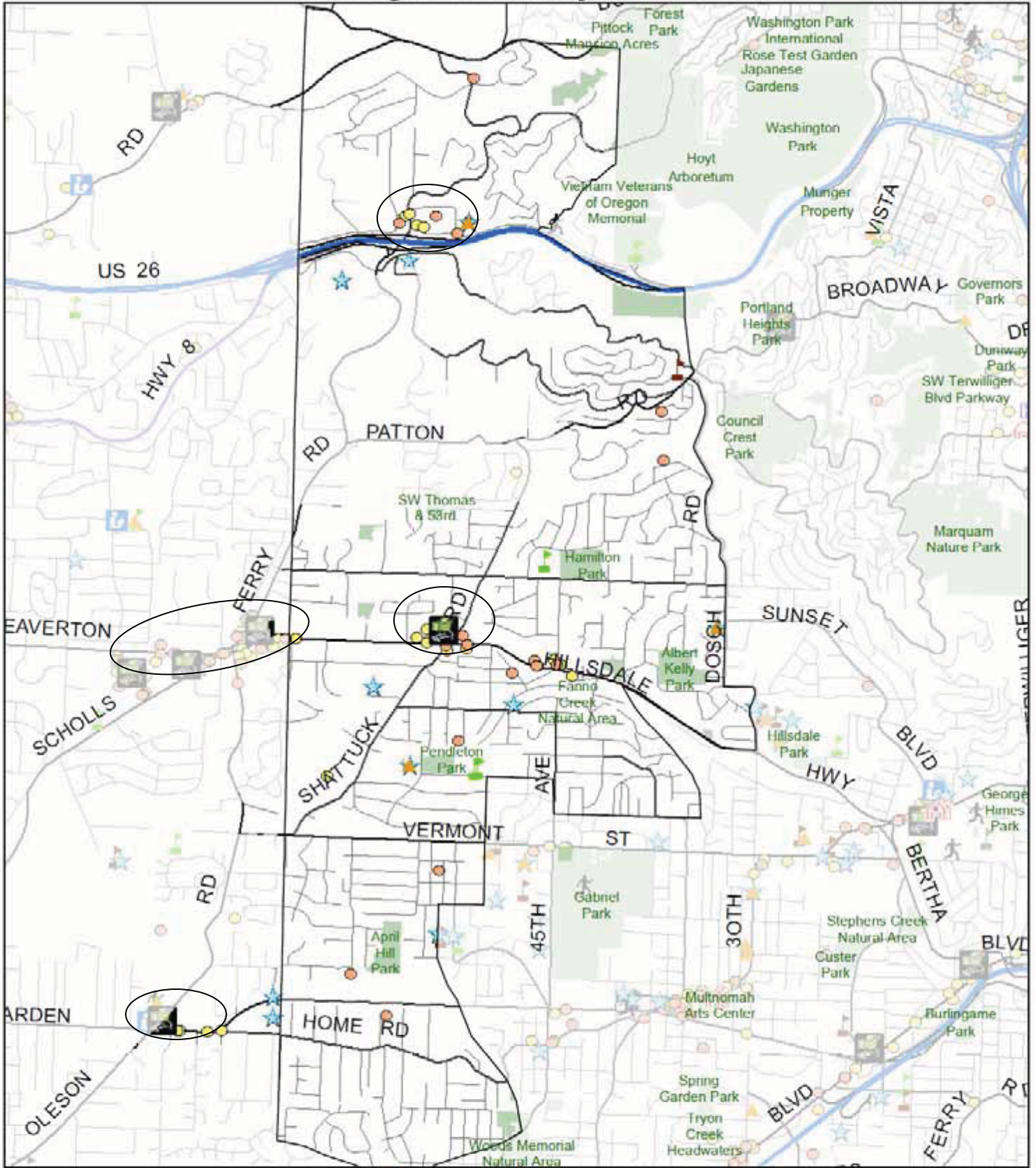


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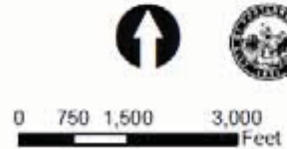
City of Portland, Oregon  
Sam Adams, Mayor • Jason Anderson, Director

# Raleigh Hills Analysis Area



## Services and Amenities

- Type 1 Commercial
- Type 2 Commercial
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Libraries
- Community Centers
- Public HS
- Public K-6
- Private Schools
- Daycare Centers



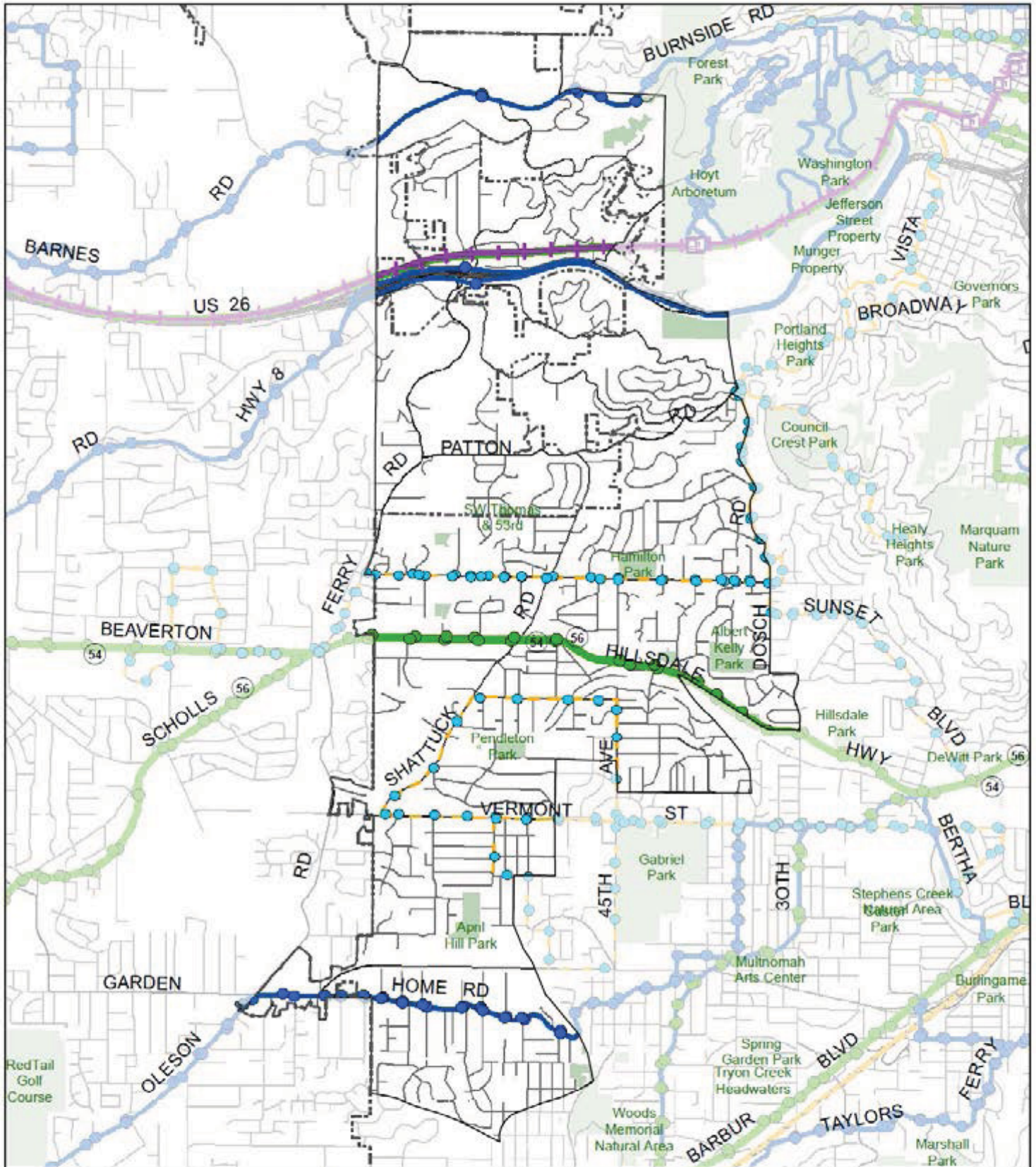
City of Portland Bureau of Planning & Sustainability  
 Sam Adams, Mayor | Susan Abernethy, Director

March 25, 2011

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commercial data from InfoUSA 2008

# Raleigh Hills Analysis Area



## Transit Infrastructure

February 1, 2012

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- |                         |                        |
|-------------------------|------------------------|
| <b>Light Rail Stops</b> | <b>Bus Stops</b>       |
| MAX                     | Frequent Stops         |
| Street Car              | Standard Stops         |
| MAX Streetcar           | Rush Hour Stops        |
|                         | Frequent Service       |
|                         | Standard Service       |
|                         | Rush-Hour Only Service |
|                         | City Boundary          |



0 1,000 2,000 3,000 Feet

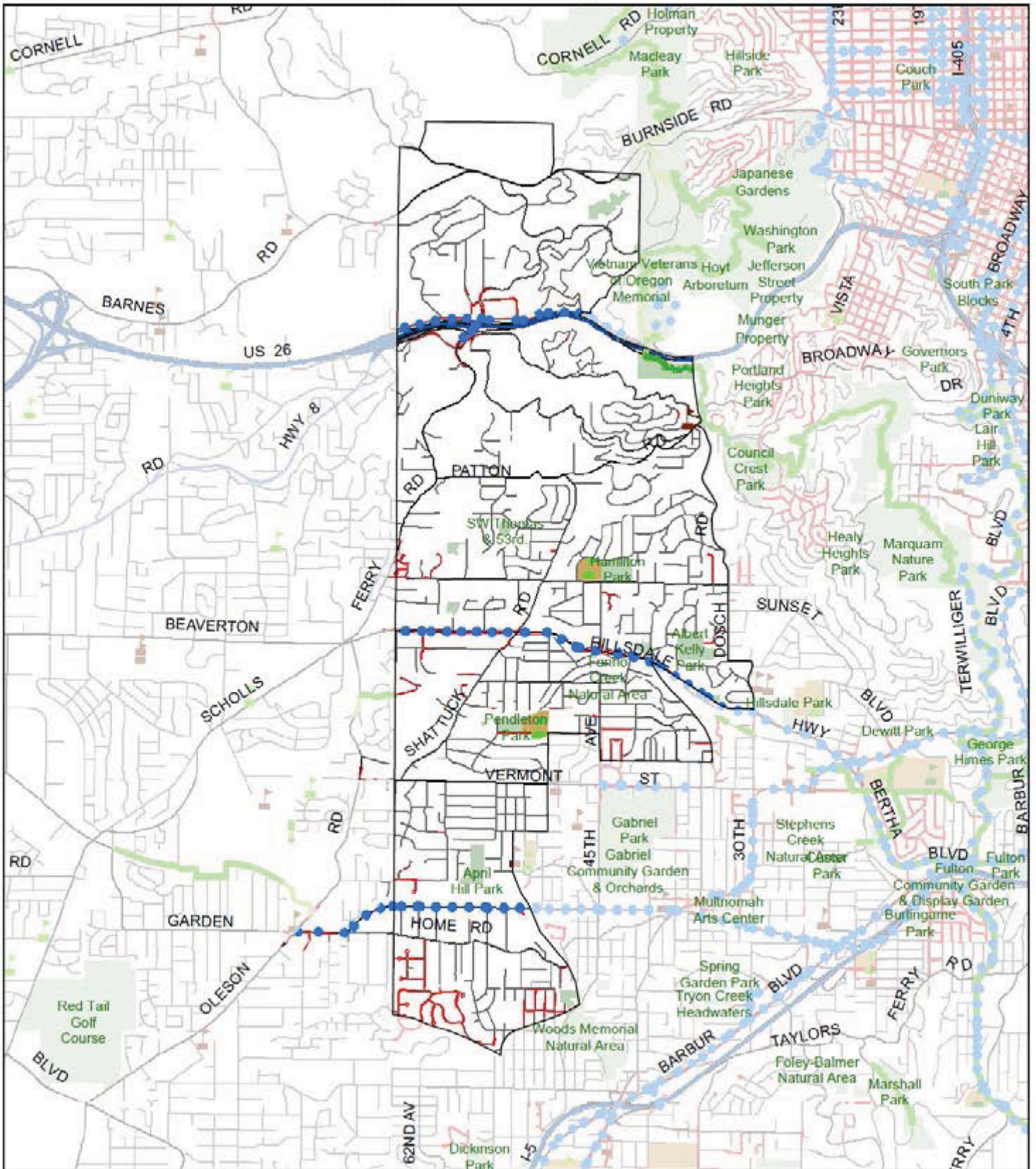


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City of Portland, Oregon  
Ben Adams, Mayor • Susan Anderson, Director

# Raleigh Hills Analysis Area

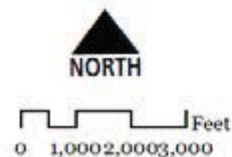


## Sidewalks and Bicycle Infrastructure

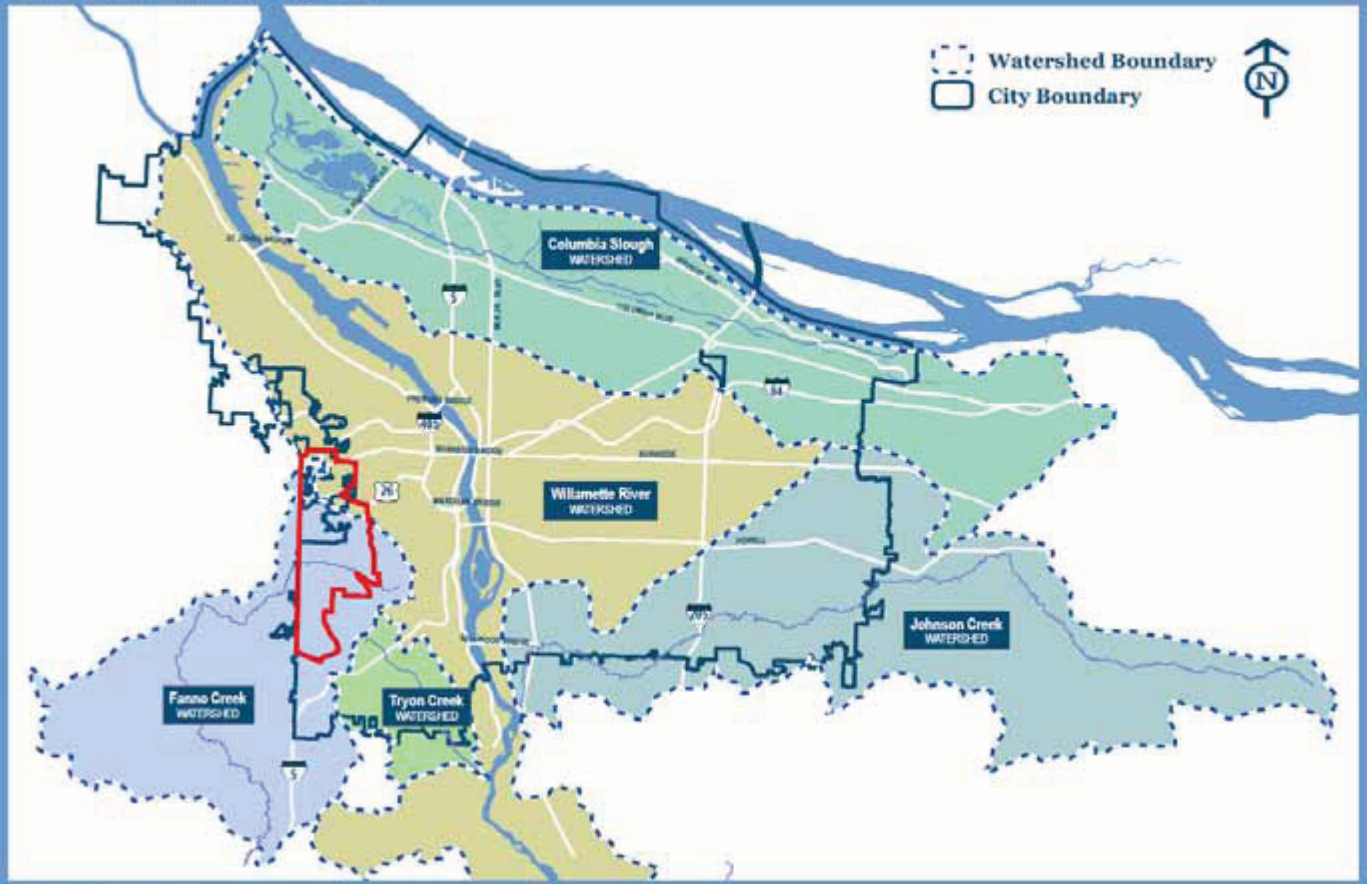
August 9, 2011

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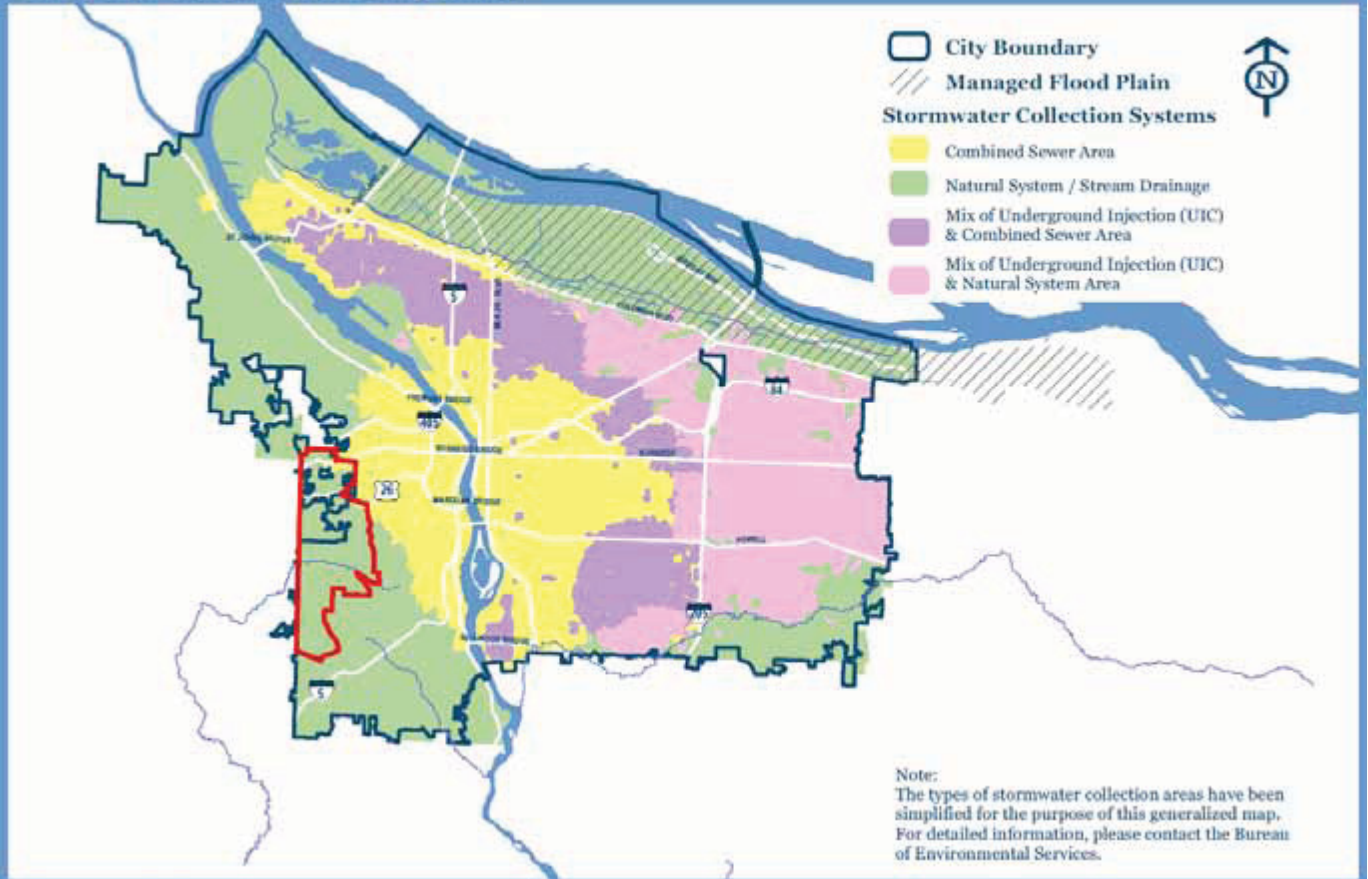
- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
-  Public HS
-  Public K-8
-  Private Schools



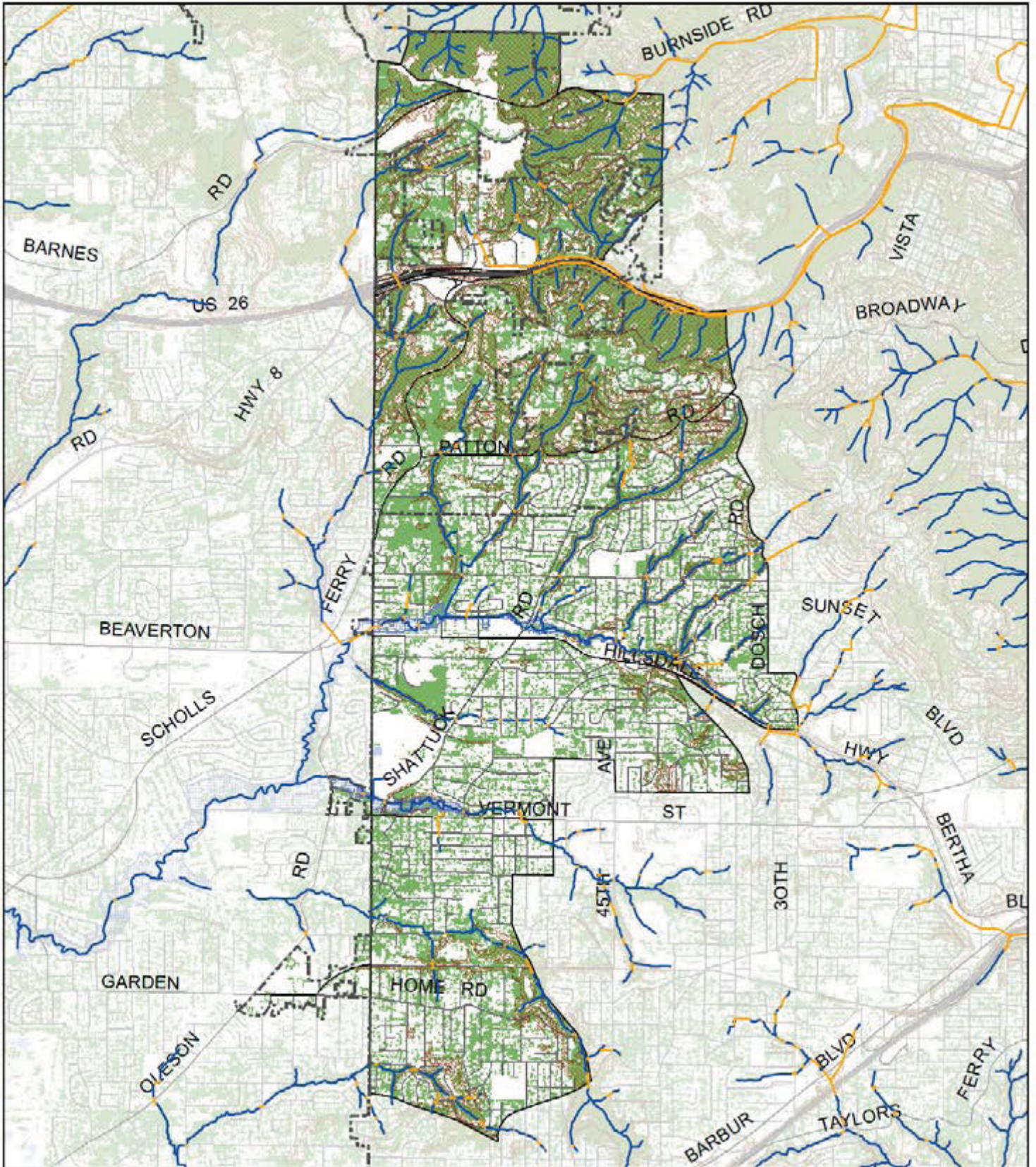
## Portland Watersheds



## Portland Stormwater System

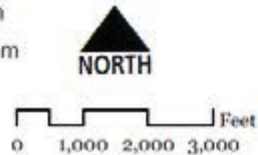


# Raleigh Hills Analysis Area



## Watersheds and Natural Features

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



August 9, 2011

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# Raleigh Hills Analysis Area Demographics (2000 – 2010)

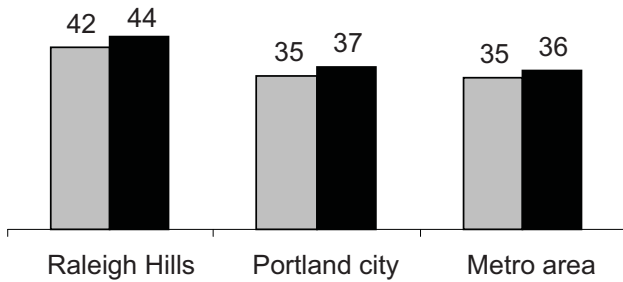
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

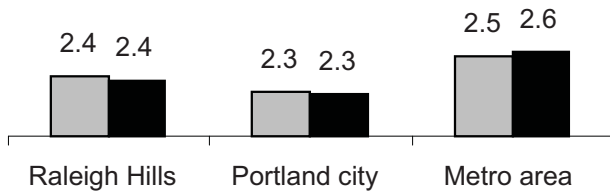
|          | Raleigh Hills | Portland city | Metro area |
|----------|---------------|---------------|------------|
| 2010     | 16,347        | 583,776       | 2,226,009  |
| 2000     | 16,413        | 529,121       | 1,927,881  |
| % change | 0%            | 10%           | 15%        |

2000 2010

## Median Age

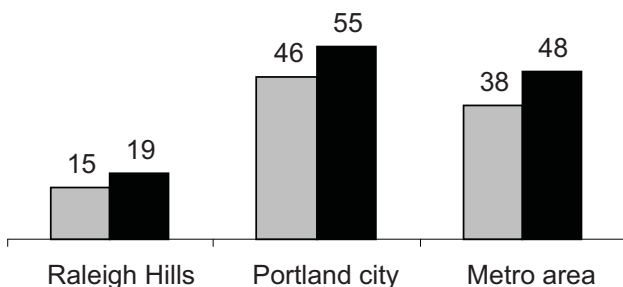


## Average Household Size

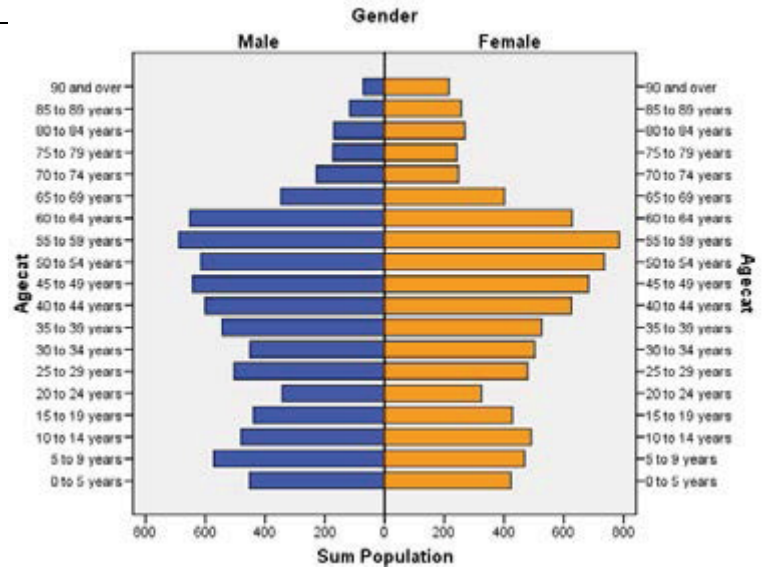


## Diversity Index

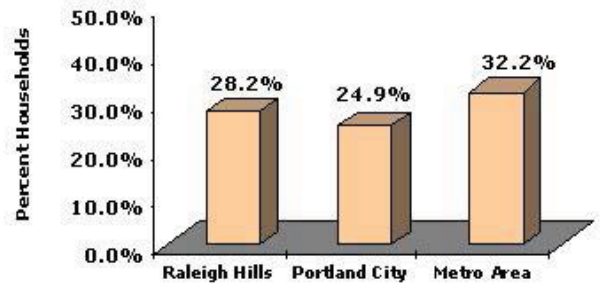
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



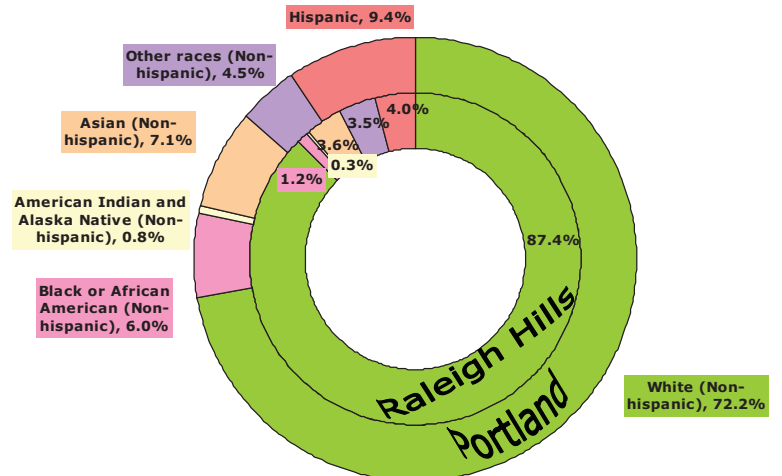
Population Pyramid for Raleigh Hills, 2010



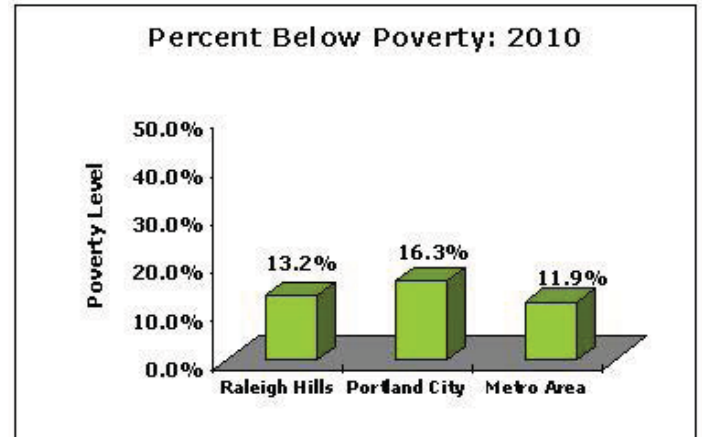
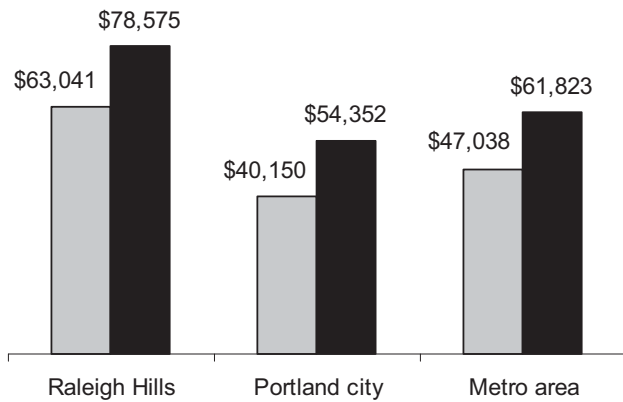
Households with Children Under 18 Years: 2010



Racial and Ethnic Distribution in Portland vs. Raleigh Hills

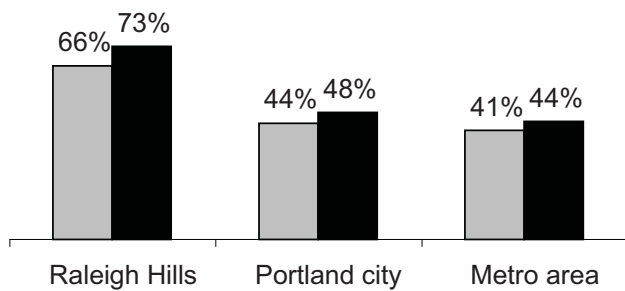


### Median Household Income

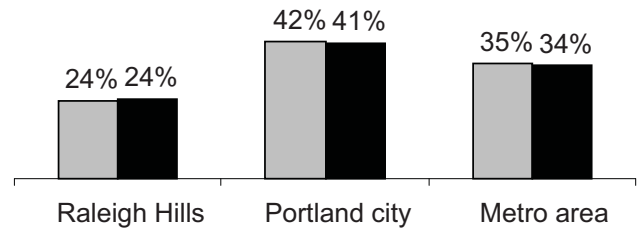


ACS 2006-2010

### Percent College Graduates



### Percent Renters of Occupied Housing Units



### Median Home Value

|          | Raleigh Hills | Portland city | Metro area |
|----------|---------------|---------------|------------|
| 2010     | \$392,082     | \$253,184     | \$273,500  |
| 2000     | \$234,420     | \$154,721     | \$168,347  |
| % change | 67.3%         | 63.6%         | 62.5%      |

# Raleigh Hills Analysis Area

## Commercial Real Estate Indicators

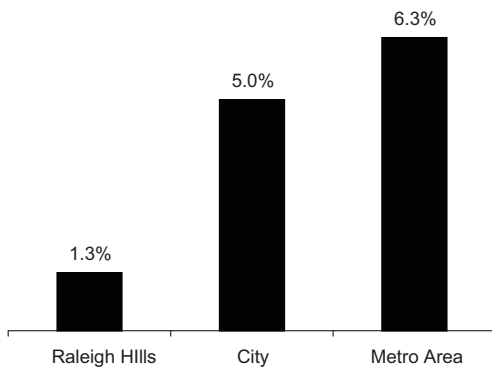
Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

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

#### Retail Vacancy



#### Retail Rents

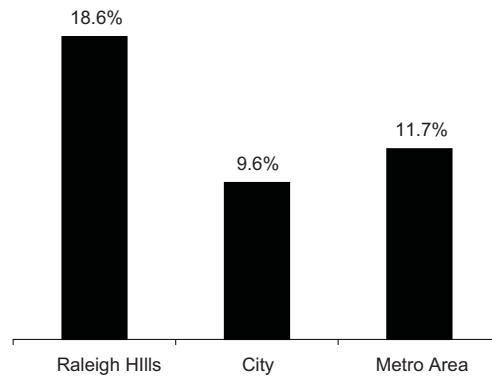


### OFFICE SPACE

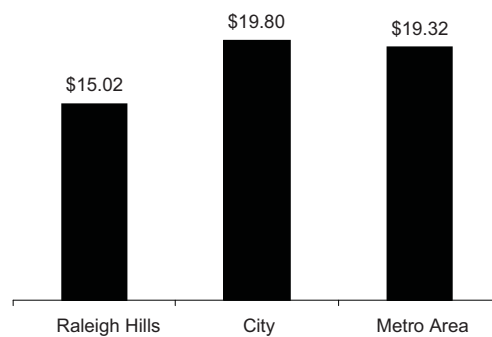
#### Square Feet

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

#### Office Vacancy



#### Office Rents



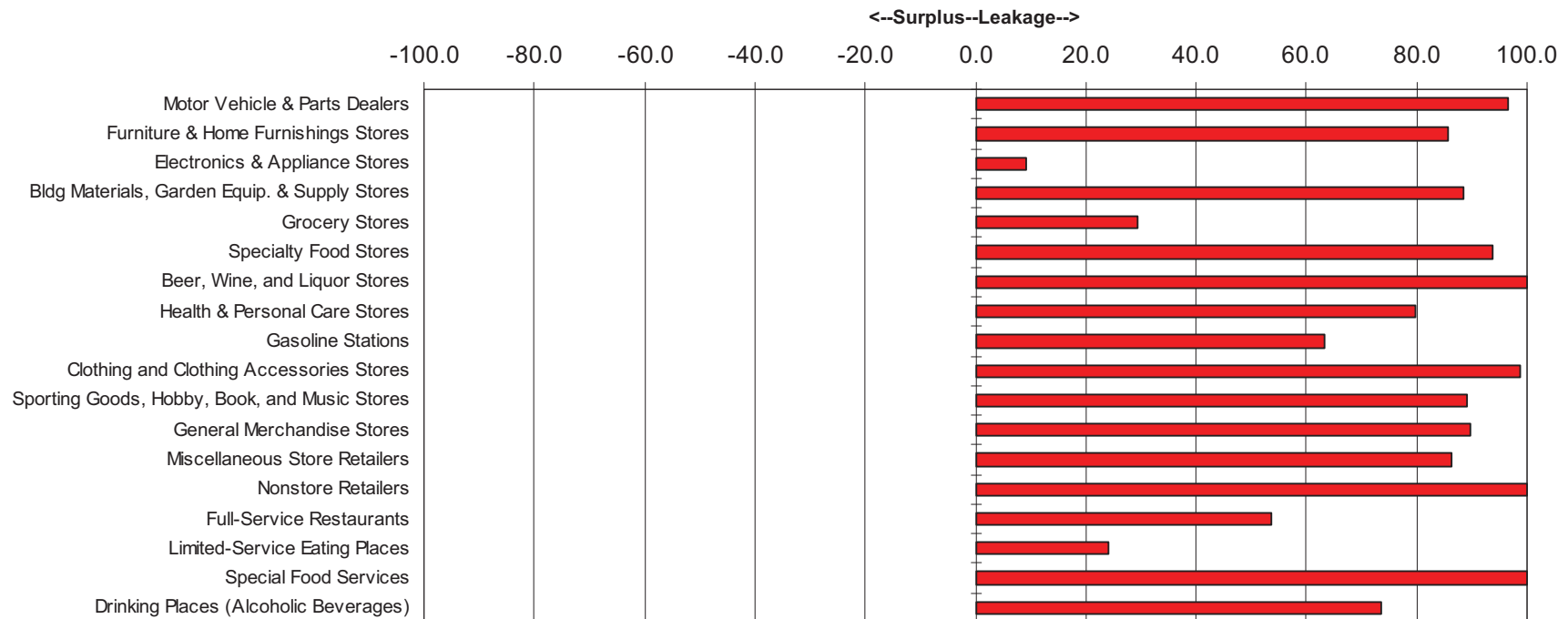
# Raleigh Hills Analysis Area

## Retail Market Profile

**Retail Gap = \$221 million**

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

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)



# Raleigh Hills Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

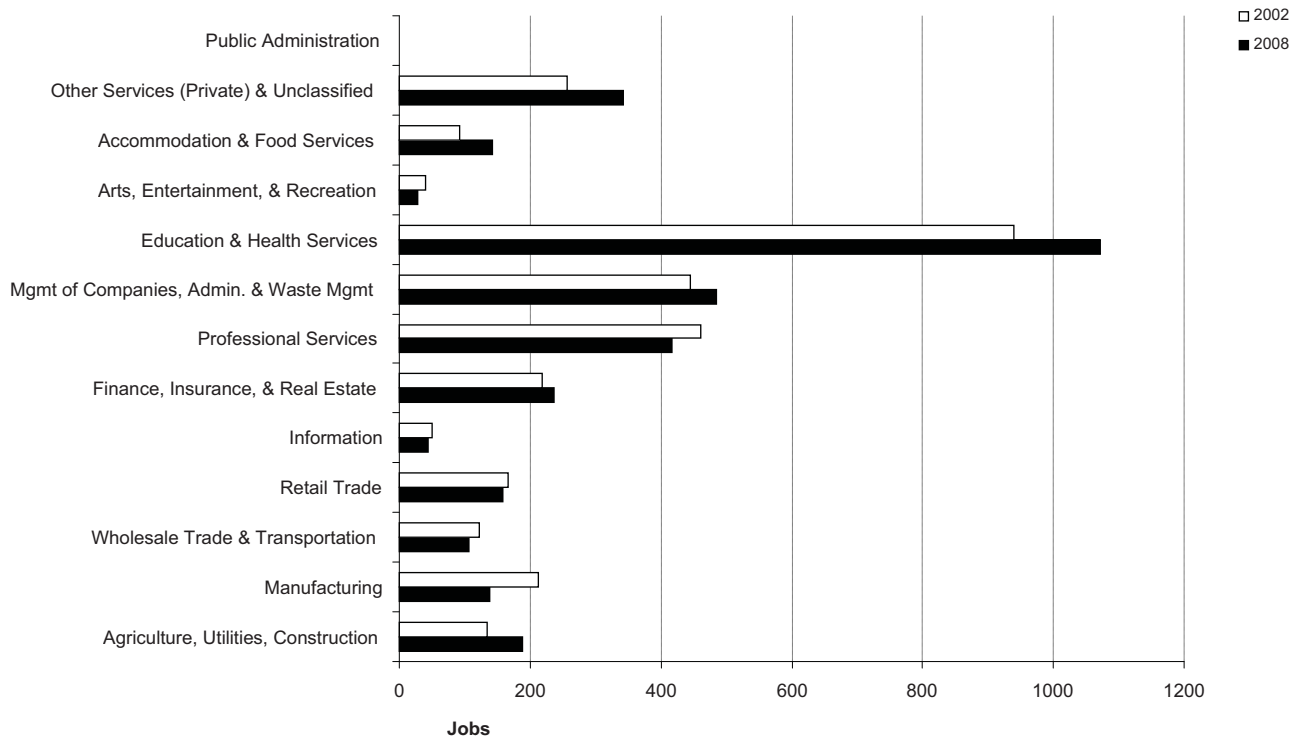
Source: Oregon Employment Department (OED)

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

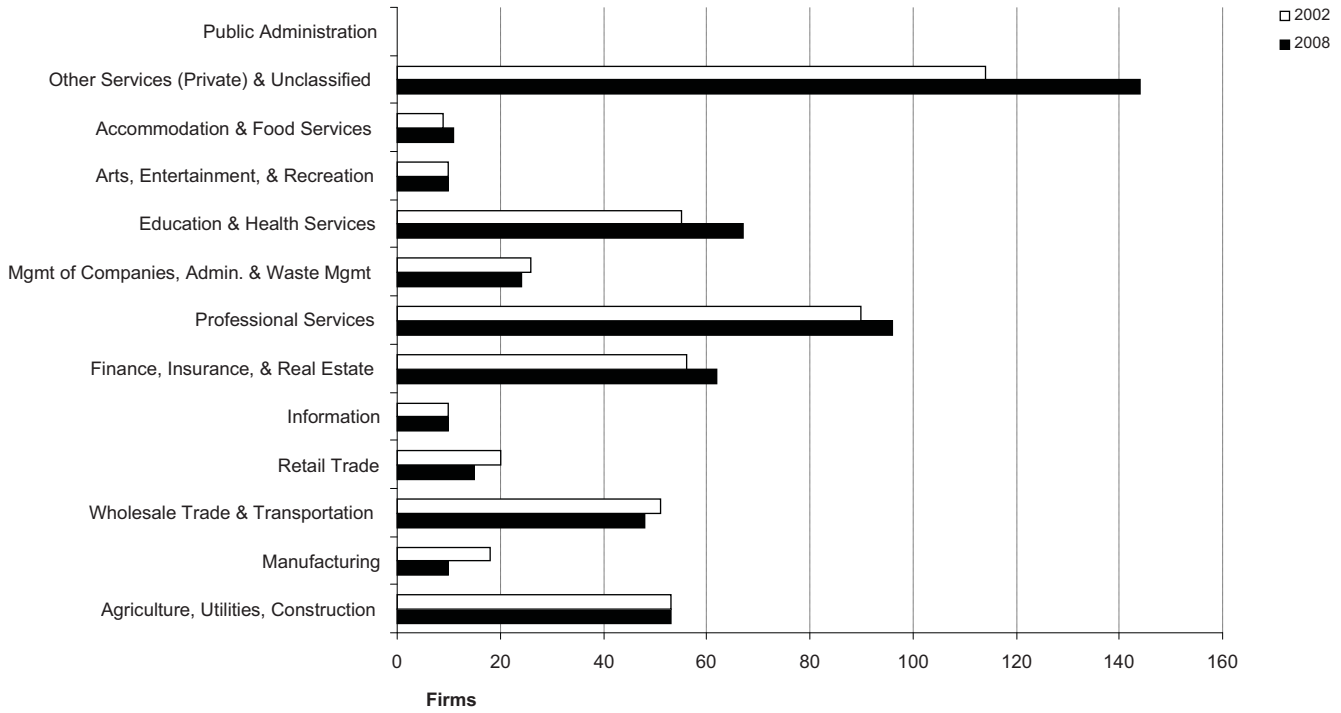
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices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

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

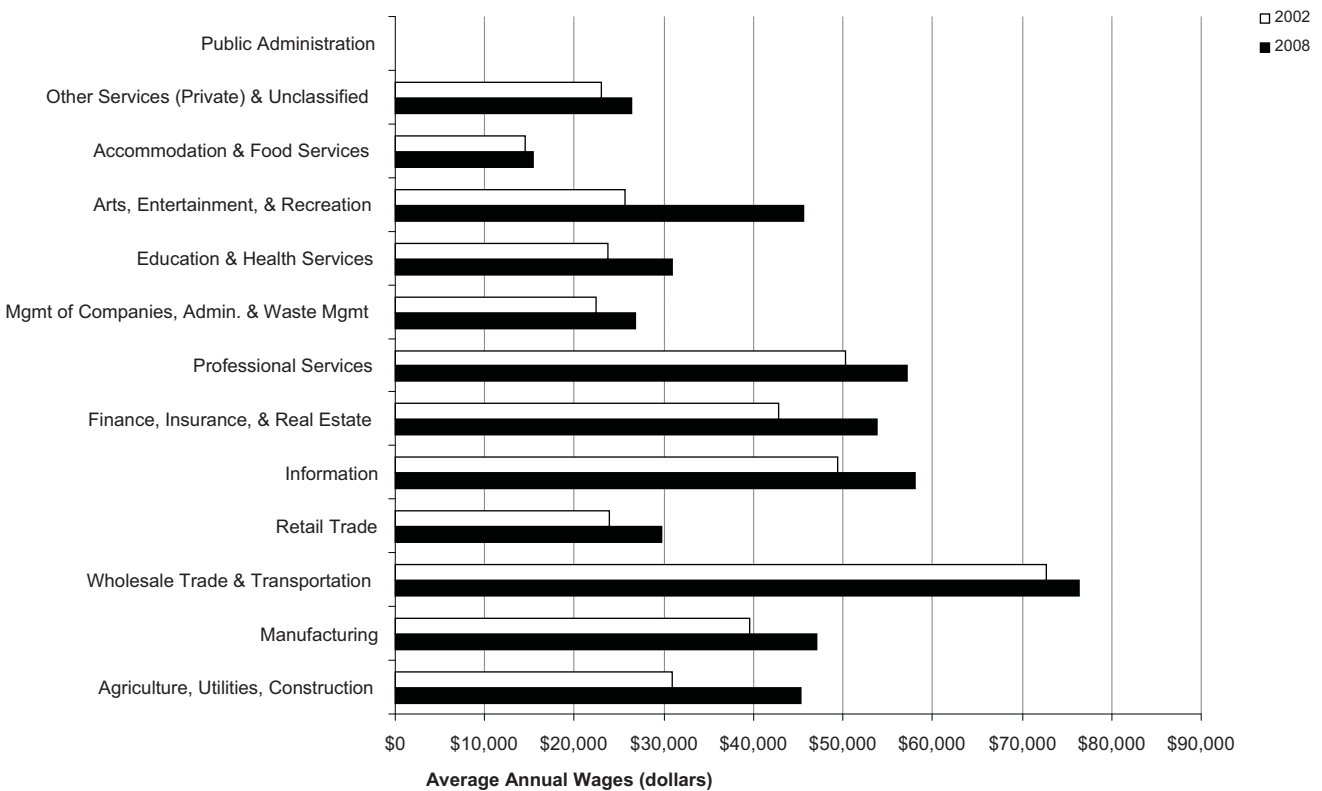
### Total Jobs



### Total Firms



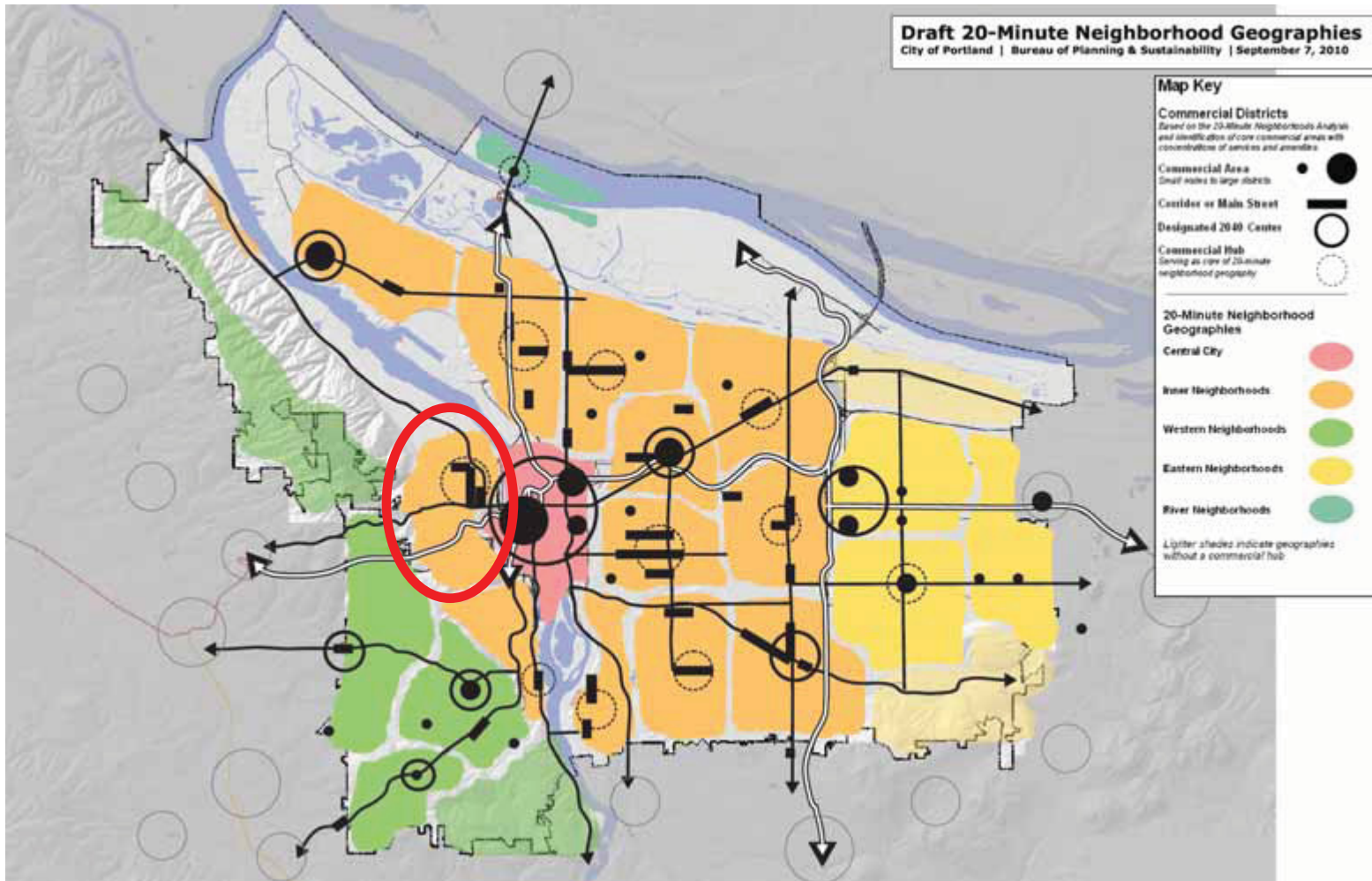
### Average Annual Wages



## Northwest Analysis Area

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

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

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.*

## Northwest Analysis Area

### Services and Amenities

Population: 21,900 people (12,800 households)  
Land Area: 4.0 sq. miles (5,400 people per sq. mile)

#### Commercial Districts

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

**Grocery stores:** 5 (1 store per 2,560 households)

**Retail gap:** \$57 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:      | 56% |
| Within 3 miles of a full-service community center*: | 75% |
| Within 1/2 mile of a full-service grocery store:    | 61% |
| Within 1/4 mile of a frequent service transit stop: | 51% |

\*Parks Bureau service standard

**Community Centers:** 1 (Hillside Community Center)

**Libraries:** 1 (Northwest Library)

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

**Tree Canopy Coverage:** 53%

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

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

**Hospitals:** 1 (Good Samaritan Hospital and Medical Center)

**Farmers Markets:** 1 (Northwest Portland Farmers Market)

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

**Walkable Access Score:** 39 (out of 100) – *Note that this is the averaged score is for the entire analysis area. Walkable access scores for the flats and heights portions are:*

*Flats (NW District and part of Goose Hollow):* 73

*Heights/hillside areas:* 22

*(from 20-Minute Neighborhoods Analysis Index)*

#### Neighborhood and Business Associations

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

**Business Associations:** Nob Hill Business Association



## Urban Form Characteristics

The area includes two distinct geographies: the “flats” with their compact street grid hosting a diverse mix of houses and apartment buildings on small lots and series of historic main street commercial areas, and the predominantly residential hillside “heights”. The hillside areas, located in the West Hills (Tualatin Mountains) feature narrow, curvilinear streets following topography, as well as rectilinear blocks on plateau areas. The area is bordered by the Central City to the east and the Guild’s Lake industrial area to the north.

**Access issues.** The area’s flats feature good street and sidewalk connectivity, but the heights lack street connectivity and accessibility is limited by topography. Public stairways provide additional pedestrian connections in hillside areas. The flats have good access to transit and to commercial and community services. Adjacency to the Central City and Guild’s Lake industrial area provide good access to jobs, services and cultural amenities.

### 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:        | 3.6 miles (NW 23 <sup>rd</sup> , NW 21 <sup>st</sup> , Burnside, Lovejoy, Thurman) |
| Station Communities: | 2 (one is outside but adjacent to this analysis area)                              |

## Zoning

|                            | Acres | % of Land Area | Buildable Acres* |
|----------------------------|-------|----------------|------------------|
| Single-Family Residential: | 814   | 42%            | 143              |
| Multi-Family Residential:  | 234   | 12%            | 51               |
| Commercial/Mixed-Use:      | 188   | 10%            | 53               |
| Employment:                | 16    | .8%            | 2                |
| Industrial:                | 111   | 6%             | 19               |
| Open Space:                | 591   | 30%            | NA               |

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

### Anticipated Growth by 2035

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

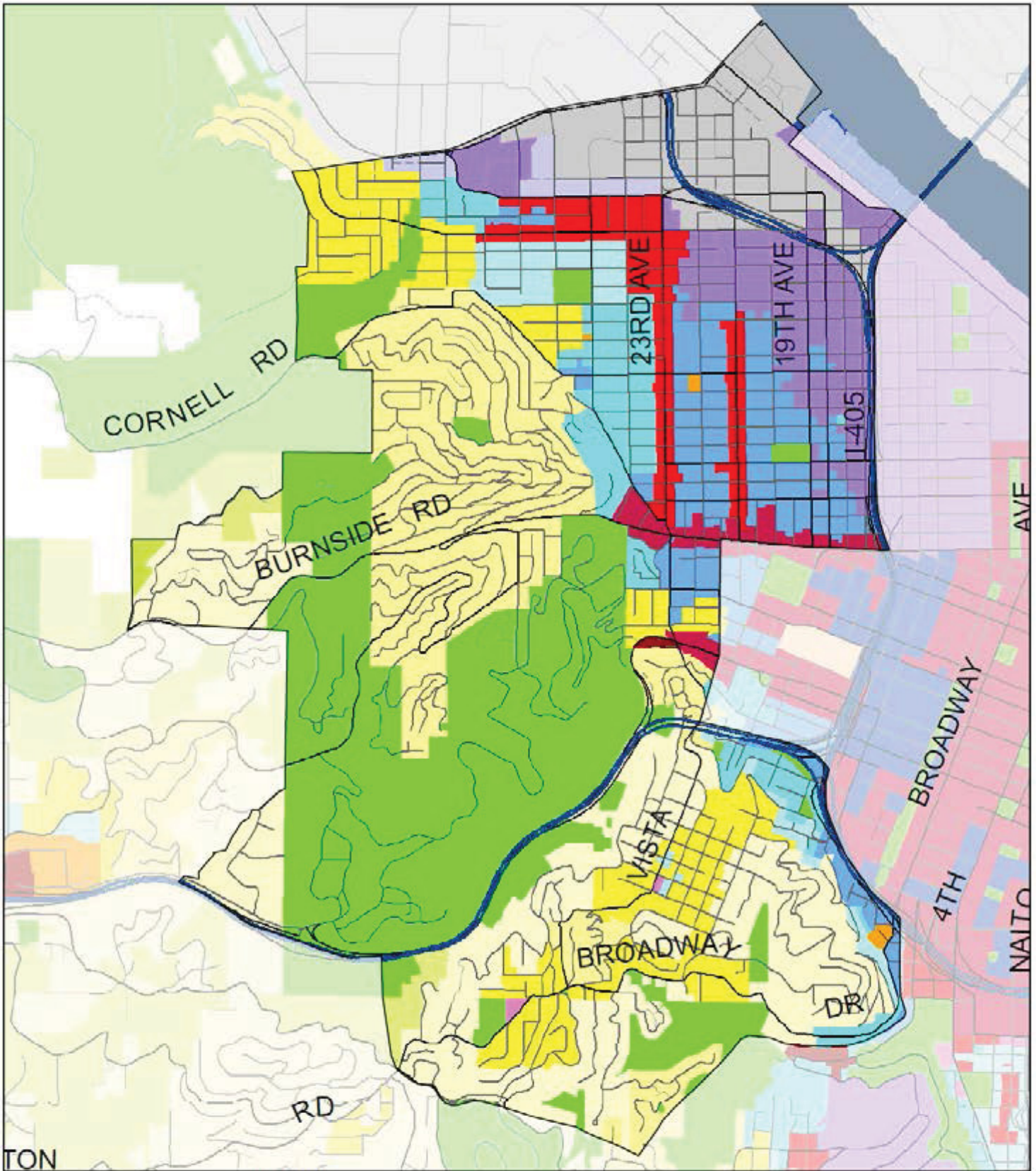
|                              |        |
|------------------------------|--------|
| 2010 Housing Units (Census): | 14,393 |
| 2035 Housing Units:          | 19,500 |

#### 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                         |

# Northwest 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 |    |

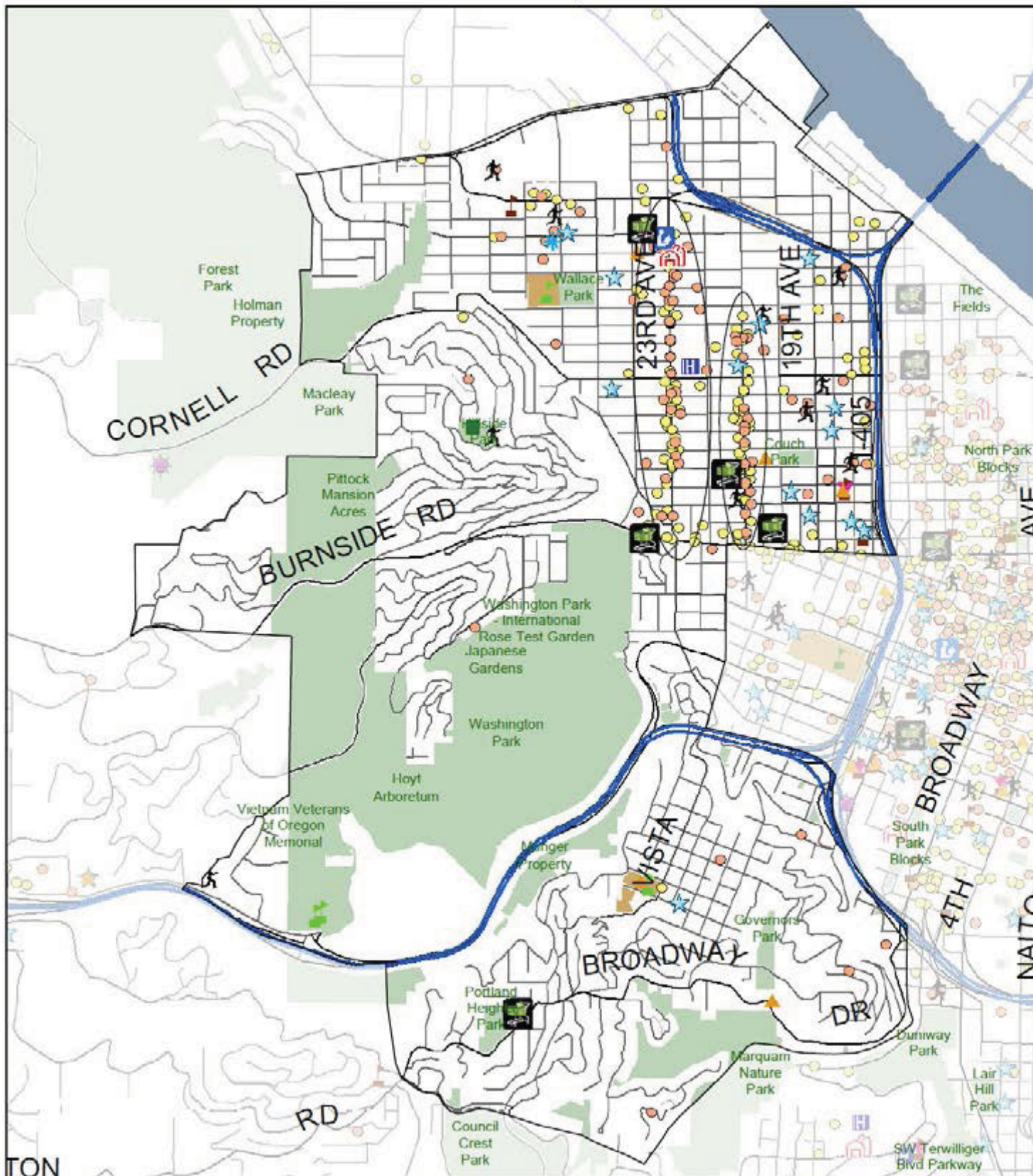


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# Northwest Analysis Area

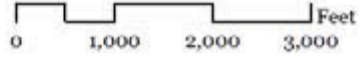


## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

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|--|--|--|
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NORTH

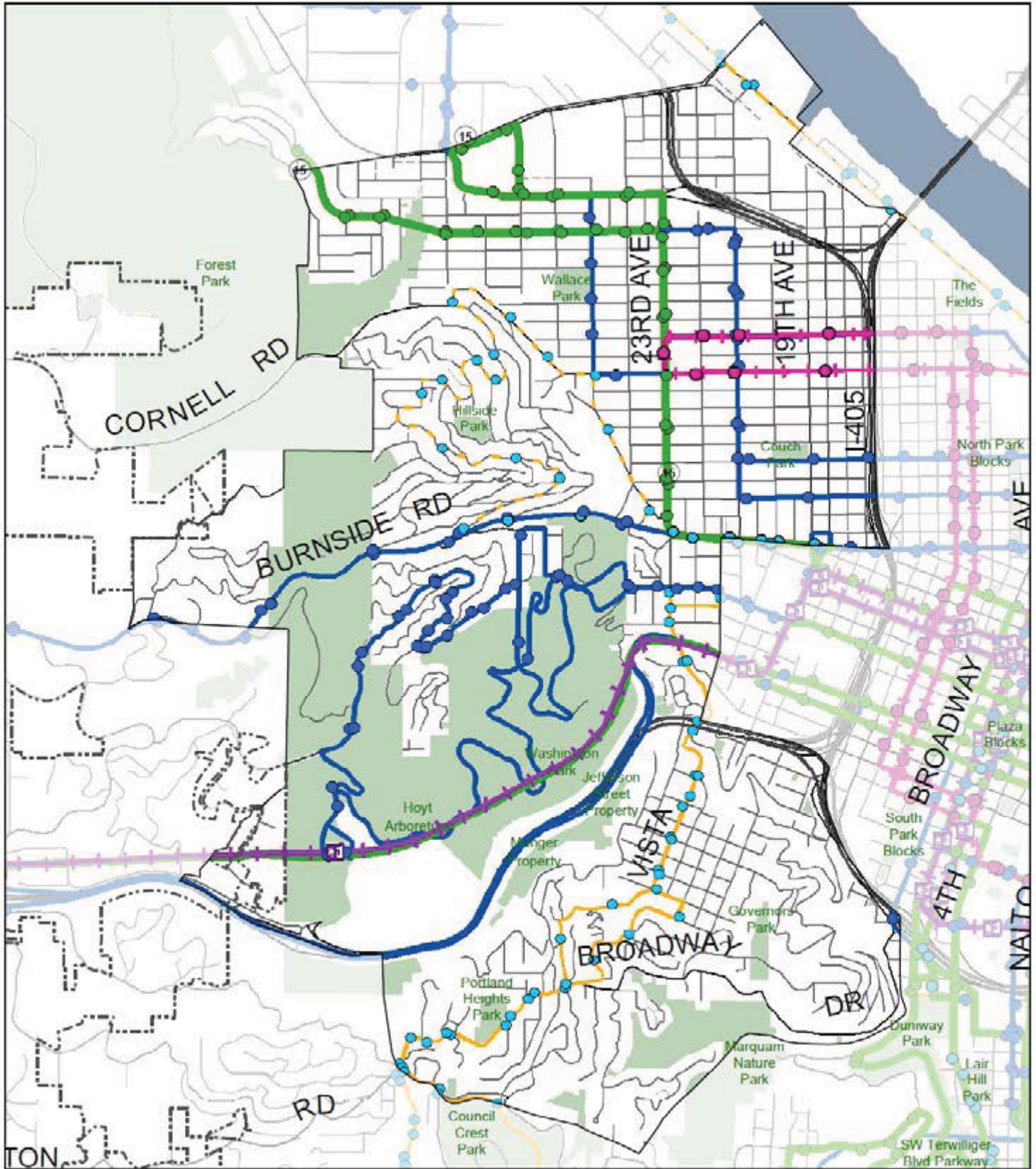


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Joan Adams, Mayor • David Anderson, Director

# Northwest Analysis Area

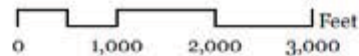


## Transit Infrastructure

February 1, 2012

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- |                         |                        |
|-------------------------|------------------------|
| <b>Light Rail Stops</b> | <b>Bus Stops</b>       |
| MAX                     | Frequent Stops         |
| Street Car              | Standard Stops         |
| MAX                     | Rush Hour Stops        |
| Streetcar               | Frequent Service       |
|                         | Standard Service       |
|                         | Rush-Hour Only Service |
|                         | City Boundary          |

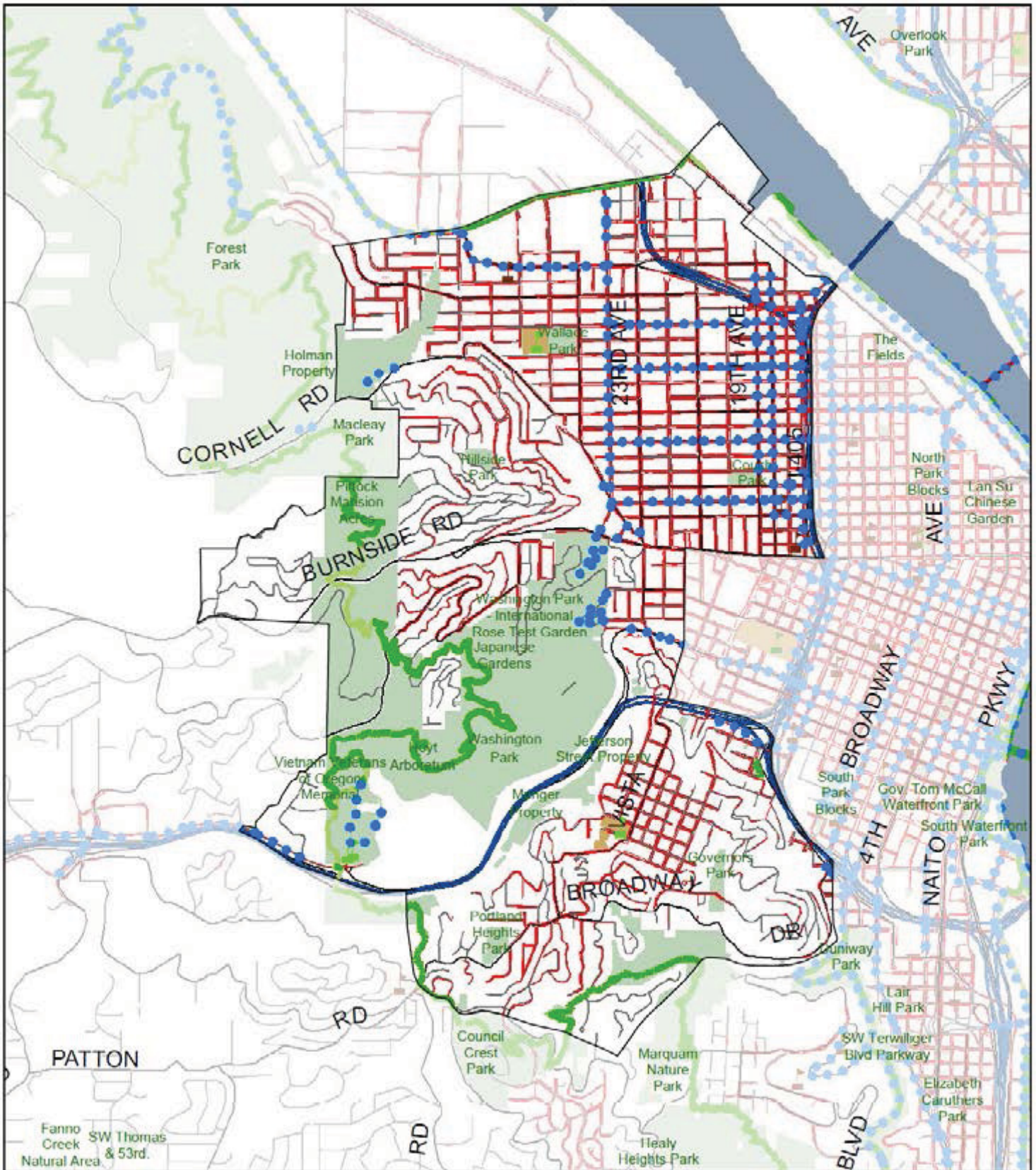


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# Northwest Analysis Area



## 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



0 1,000 2,000 3,000 Feet

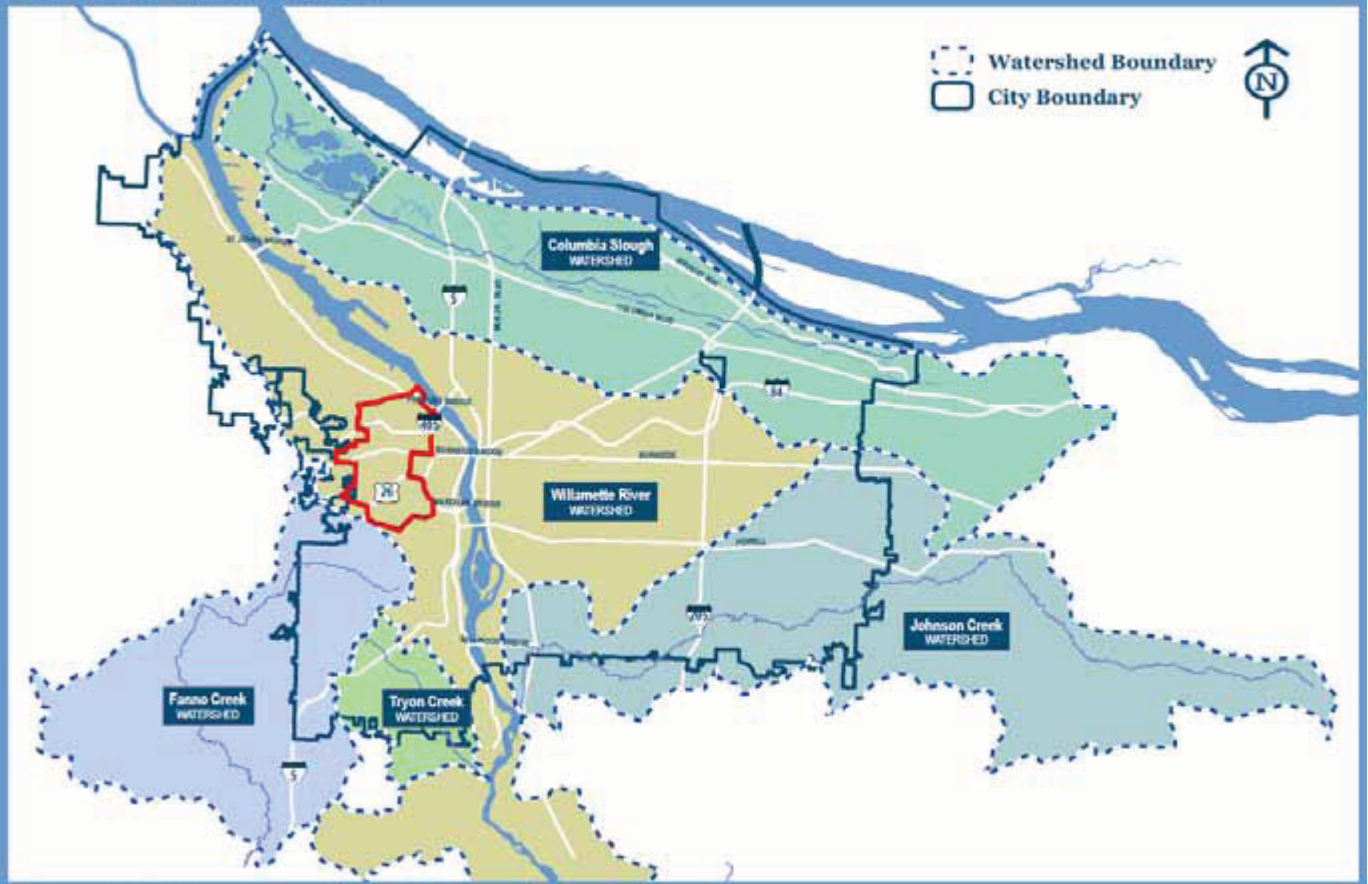


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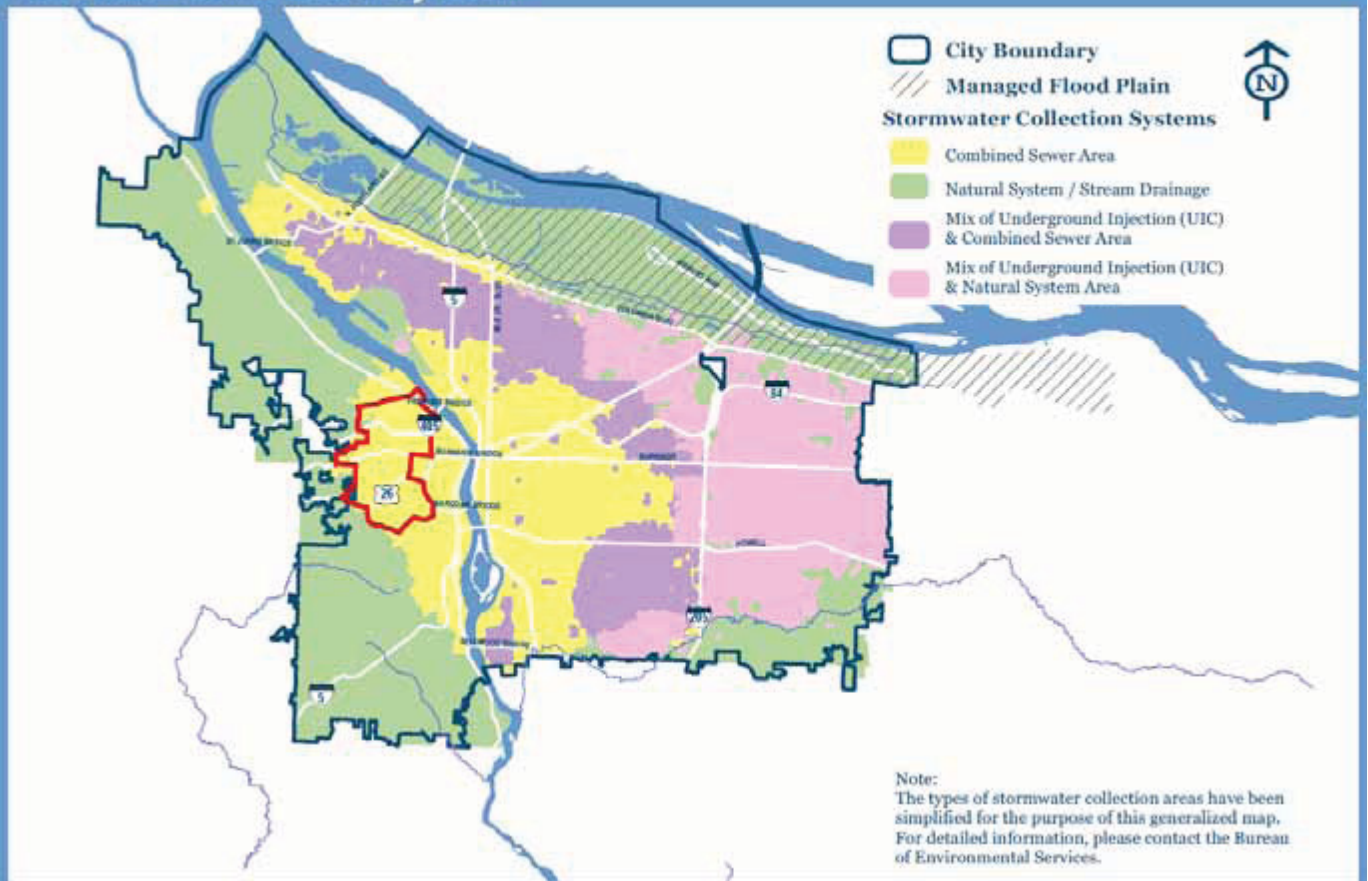


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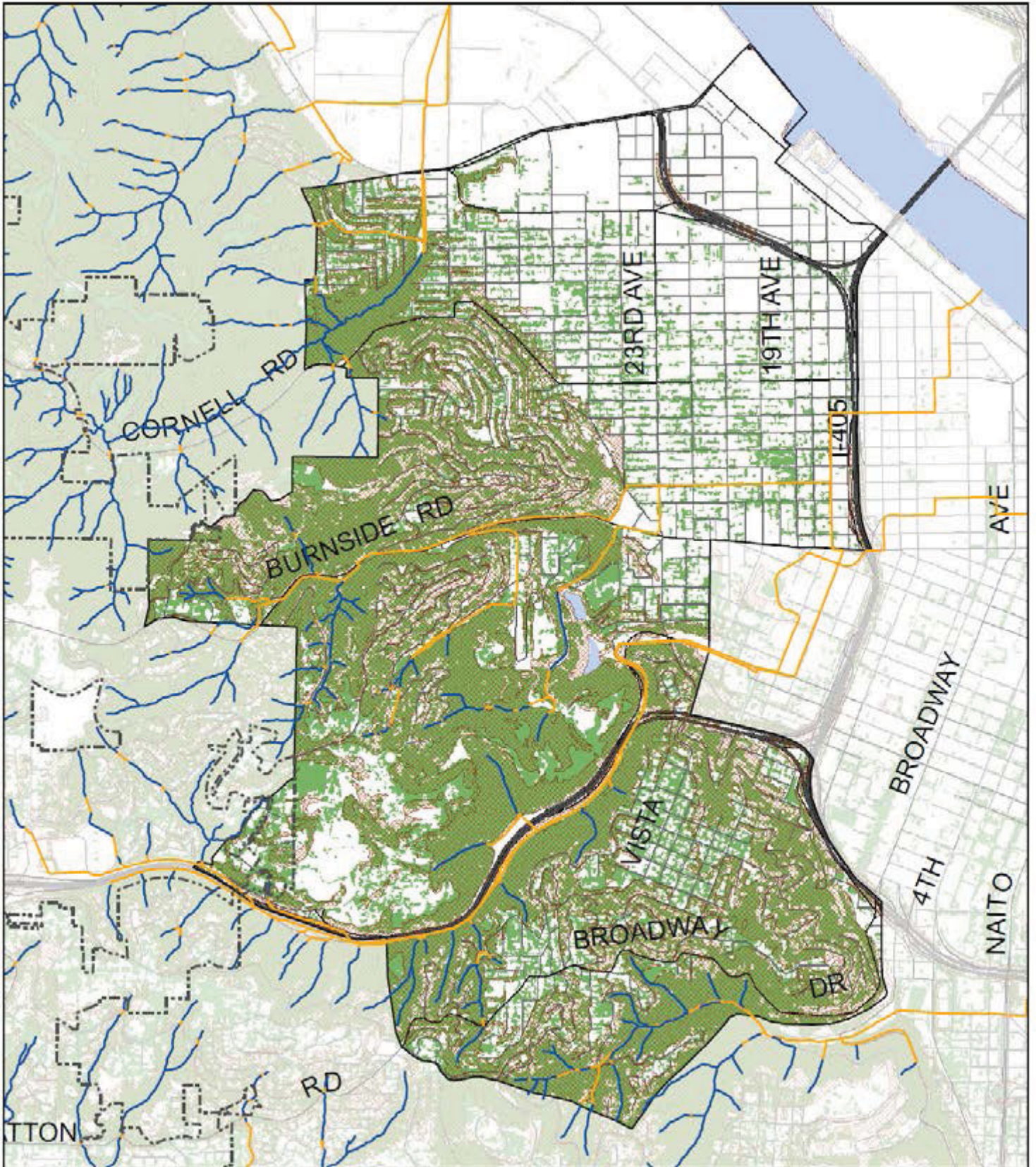
## Portland Watersheds



## Portland Stormwater System



# Northwest Analysis Area



## Watersheds and Natural Features

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



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August 9, 2011

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# Northwest Analysis Area Demographics (2000 – 2010)

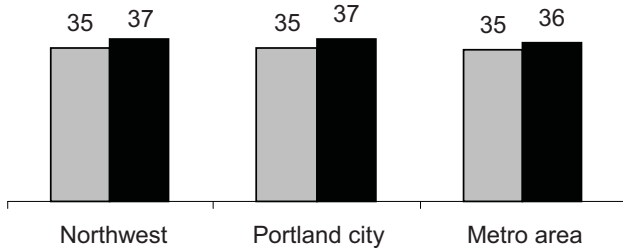
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

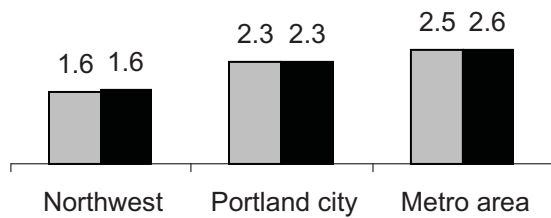
|          | Northwest | Portland city | Metro area |
|----------|-----------|---------------|------------|
| 2010     | 21,857    | 583,776       | 2,226,009  |
| 2000     | 20,014    | 529,121       | 1,927,881  |
| % change | 9%        | 10%           | 15%        |

■ 2000 ■ 2010

## Median Age

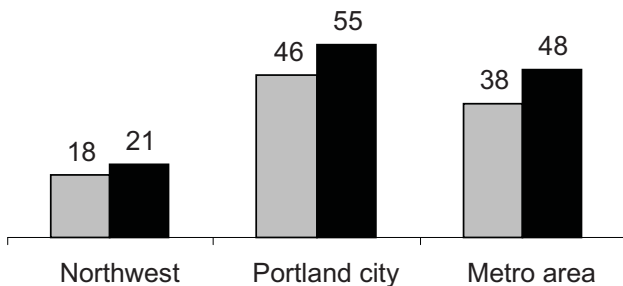


## Average Household Size

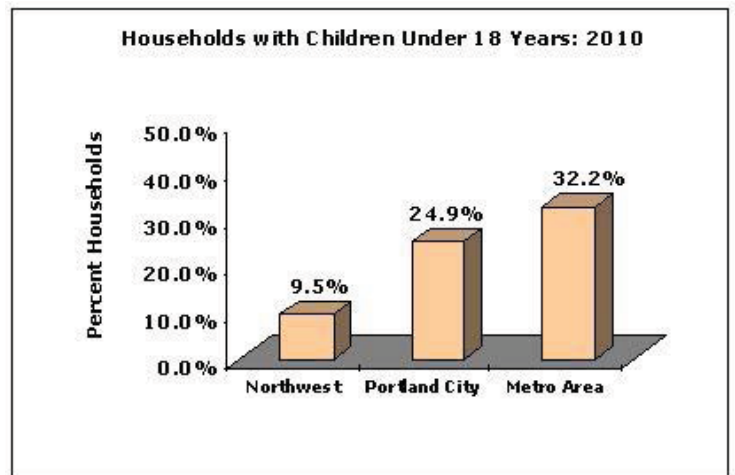
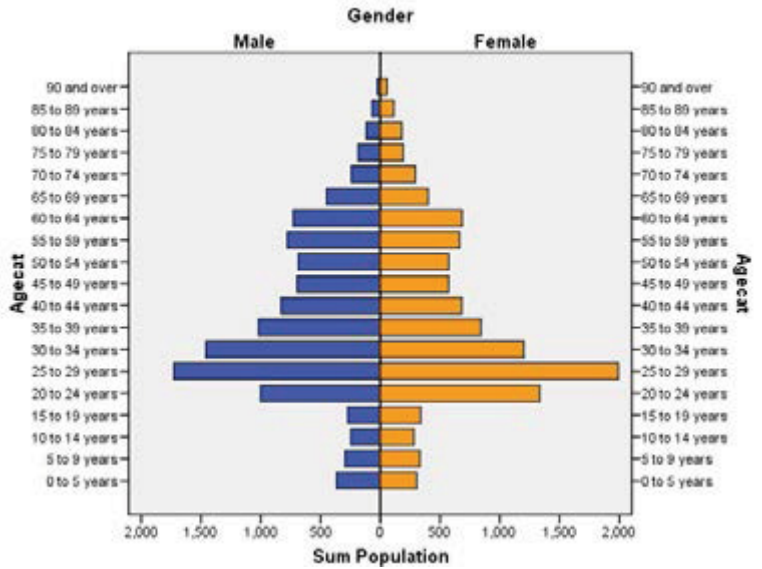


## Diversity Index

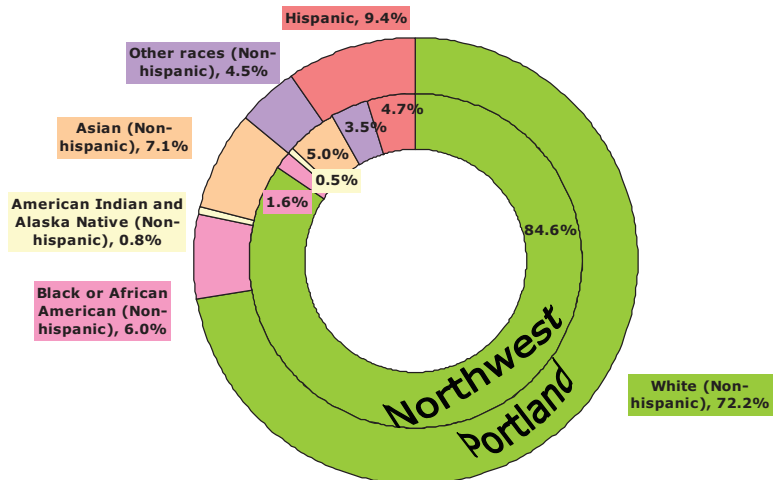
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



Population Pyramid for Northwest, 2010

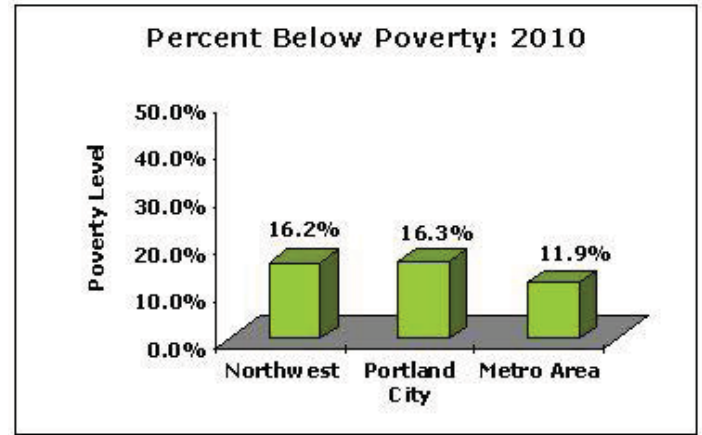
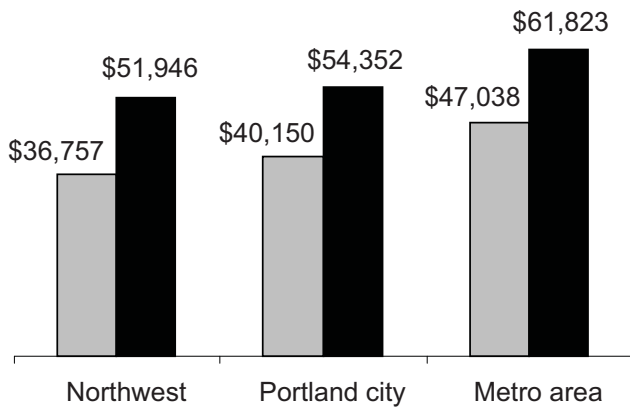


Racial and Ethnic Distribution in Portland vs. Northwest



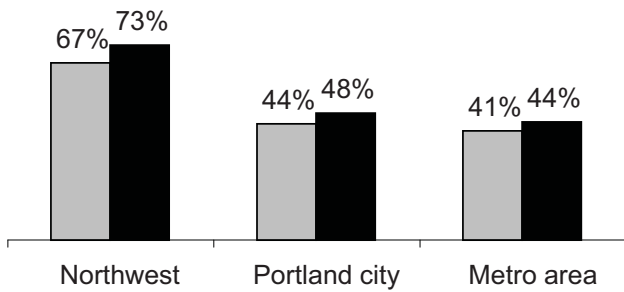


### Median Household Income

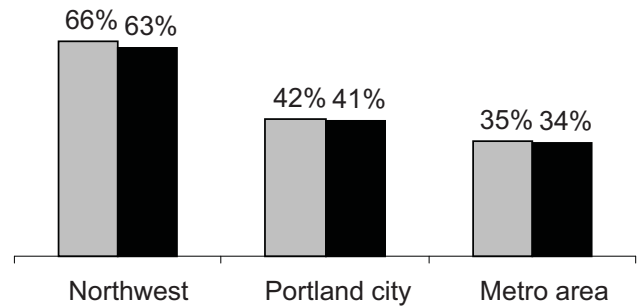


ACS 2006-2010

### Percent College Graduates



### Percent Renters of Occupied Housing Units



### Median Home Value

|          | Northwest | Portland city | Metro area |
|----------|-----------|---------------|------------|
| 2010     | \$636,032 | \$253,184     | \$273,500  |
| 2000     | \$387,319 | \$154,721     | \$168,347  |
| % change | 64.2%     | 63.6%         | 62.5%      |

# Northwest Analysis Area

## Commercial Real Estate Indicators

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

### RETAIL

#### Square Feet

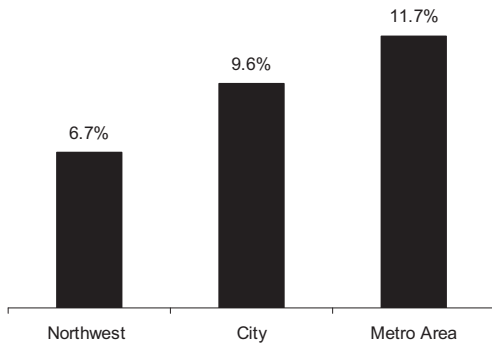
| Northwest | City       | Metro Area  |
|-----------|------------|-------------|
| 2,531,441 | 51,937,895 | 107,875,146 |

### OFFICE SPACE

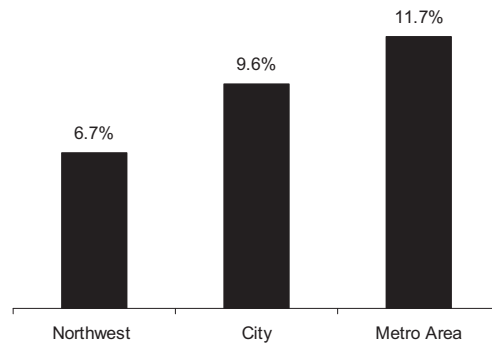
#### Square Feet

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

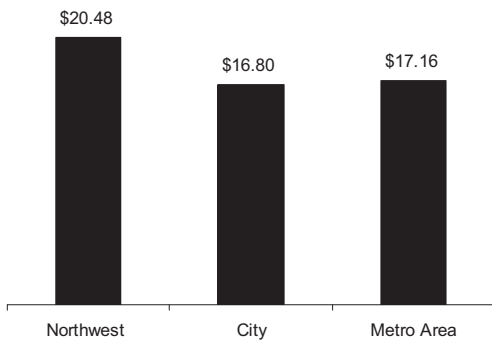
#### Retail Vacancy



#### Office Vacancy



#### Retail Rents



#### Office Rents



# Northwest Analysis Area

## Retail Market Profile

**Retail Gap = \$57 million**

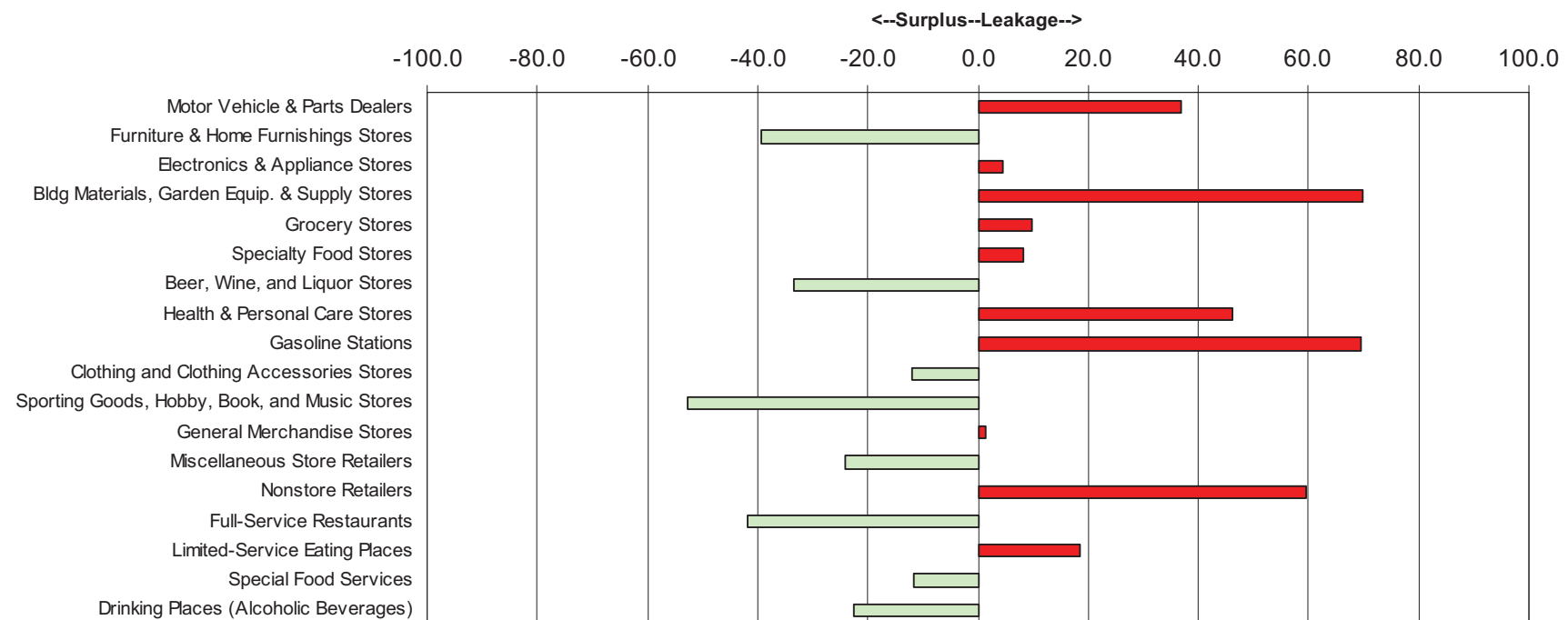
| Industry Summary                                       | Demand<br>(Retail Potential) | Supply<br>(Retail Sales) | Retail Gap<br>(Demand - Supply) | Surplus / LEAKAGE<br>Factor | Number of<br>Businesses |
|--|------------------------------|--------------------------|---------------------------------|-----------------------------|-------------------------|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

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)



# Northwest Analysis Area

## Employment

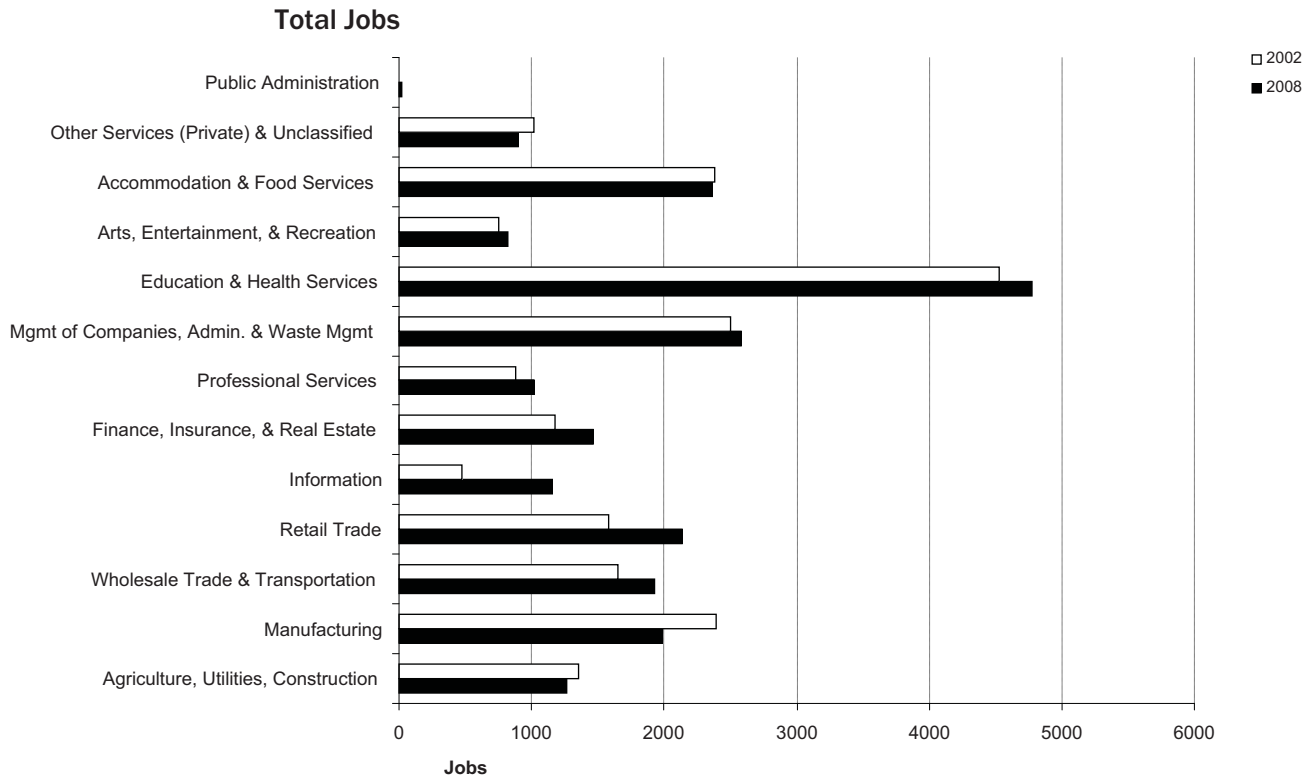
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

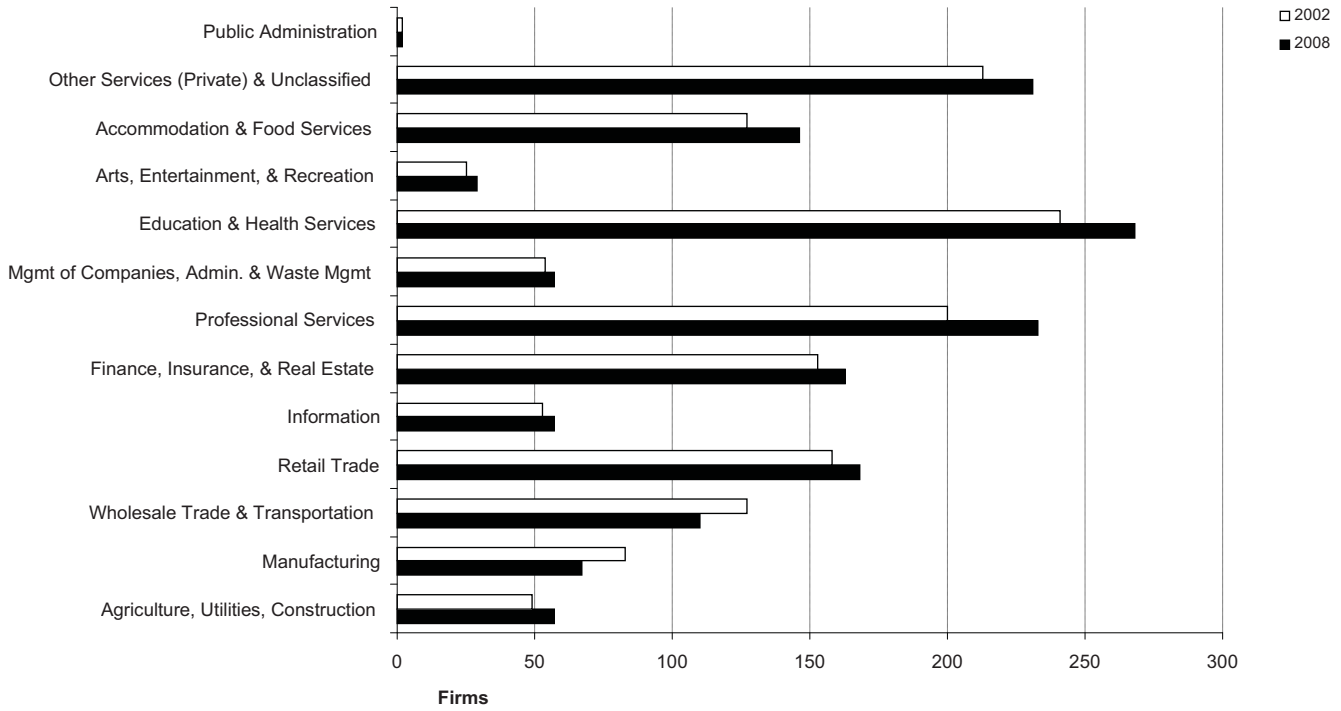
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

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

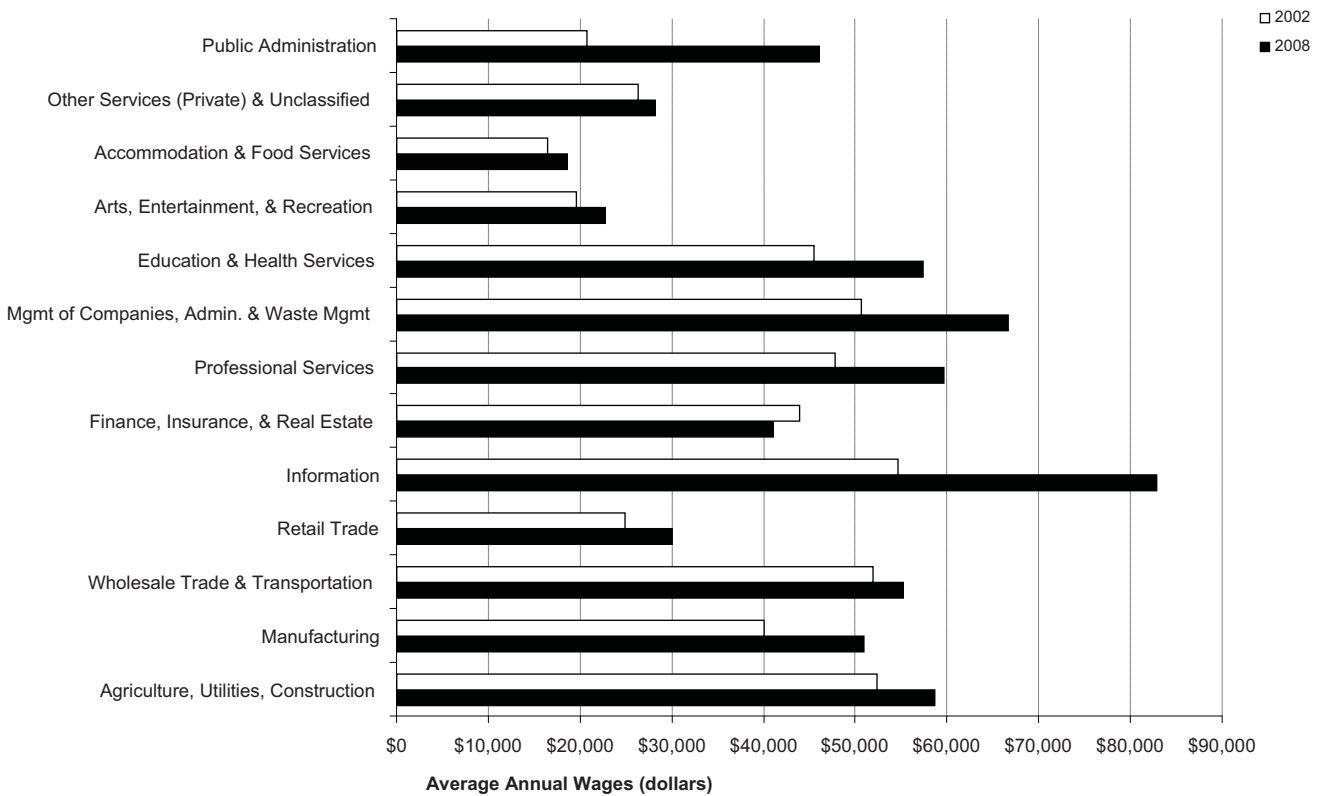
|                      | 2002     | 2008     | change |
|----------------------|----------|----------|--------|
| Total Jobs           | 20,720   | 22,409   | +1,689 |
| Total Firms          | 1,485    | 1,588    | +103   |
| Average Annual Wages | \$39,846 | \$49,005 | +9,159 |



### Total Firms



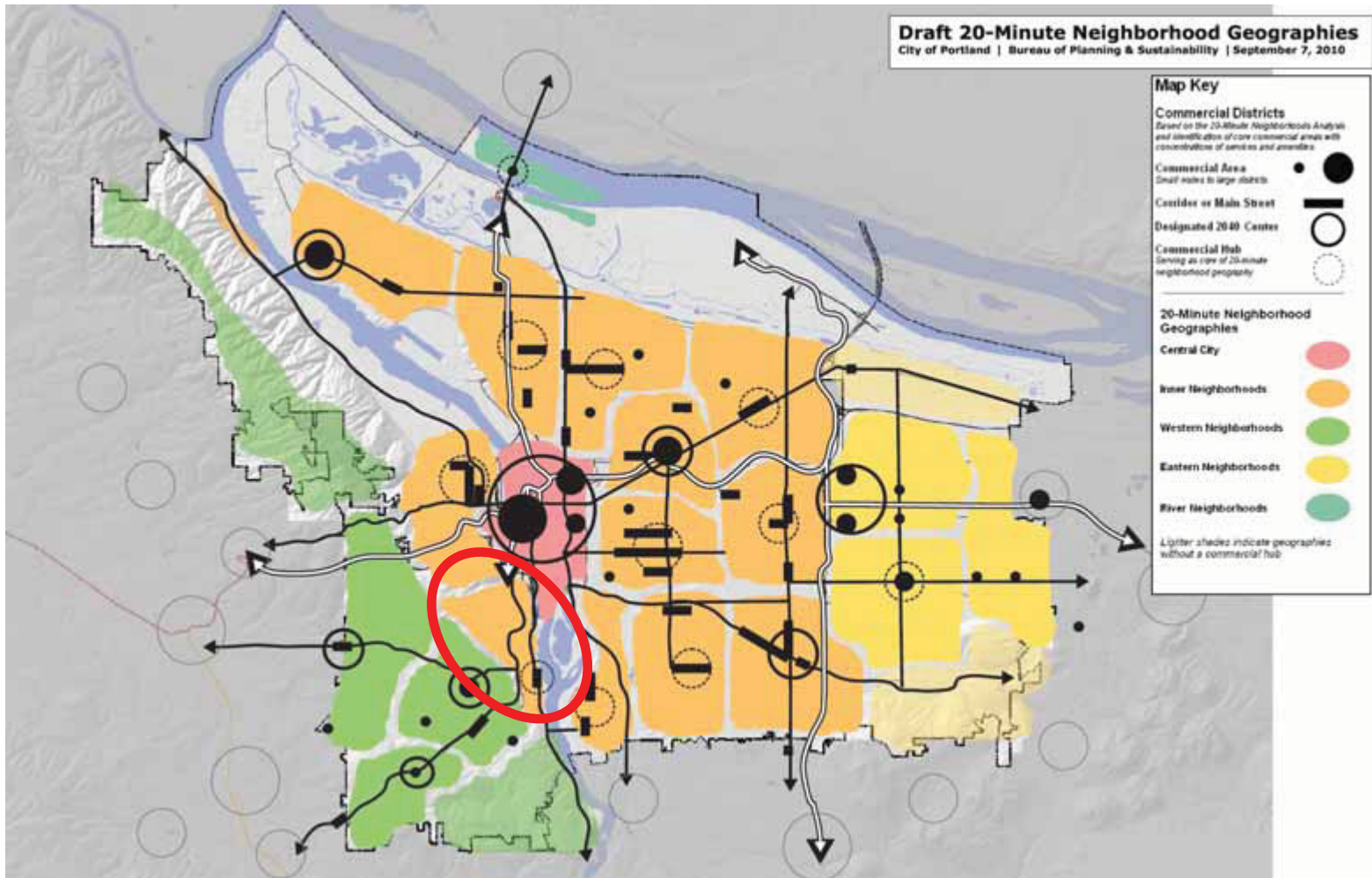
### Average Annual Wages



## South Portland-Marquam Hill Analysis Area

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

### Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

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.*

# South Portland-Marquam Hill Analysis Area

## Services and Amenities

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

### Commercial Districts

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

**Grocery stores:** 1 (1 store per 4,600 households)

**Retail gap:** \$61 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*:                         | 61% |
| Within 1/2 mile of a public elementary school:      | 0%  |
| Within 3 miles of a full-service community center*: | 22% |
| Within 1/2 mile of a full-service grocery store:    | 8%  |
| Within 1/4 mile of a frequent service transit stop: | 18% |

\*Parks Bureau service standard

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

**Libraries:** None

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

**Tree Canopy Coverage:** 56%

**Public Schools:** None

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

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

**Farmers Markets:** 1 (OHSU Farmers Market)

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

**Walkable Access Score:** 31 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

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

**Business Associations:** South Portland Business Association

## Urban Form Characteristics

This area includes two distinct geographies: the flats with their compact grid of streets, originally developed during the Streetcar Era with a continuous system of sidewalks, and hillside areas often featuring curvilinear streets following topography. Prominent hillside features include forested slopes and ravines, the Terwilliger Parkway, and the OHSU hospital complex. Macadam Avenue is the primary commercial corridor in the flats, which are bordered by the Central City to the northeast and by the Willamette River.

**Access issues.** The area’s flats feature good street and sidewalk connectivity, but the heights lack street connectivity and accessibility is limited by topography. Public stairways and off-street trails provide additional pedestrian connections in some hillside areas. The flats have fairly good access to commercial services, but most residents are not within a walkable distance of frequent service transit. Adjacency to the Central City provides good access to jobs, services and cultural amenities. The I-5 and I-405 freeways, Barbur Boulevard and the Ross Island Bridge approaches serve as barriers to pedestrian access.

### 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:        | .8 mile (Macadam) |
| Station Communities: | 0                 |

## Zoning

|                            | Acres | % of Land Area | Buildable Acres* |
|----------------------------|-------|----------------|------------------|
| Single-Family Residential: | 453   | 40%            | 126              |
| Multi-Family Residential:  | 188   | 17%            | 46               |
| Commercial/Mixed-Use:      | 231   | 20%            | 137              |
| Employment:                | 2     | .1%            | 1                |
| Industrial:                | 0     | 0%             | 0                |
| Open Space:                | 259   | 23%            | 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): | 4,668 |
| 2035 Housing Units:          | 7,600 |

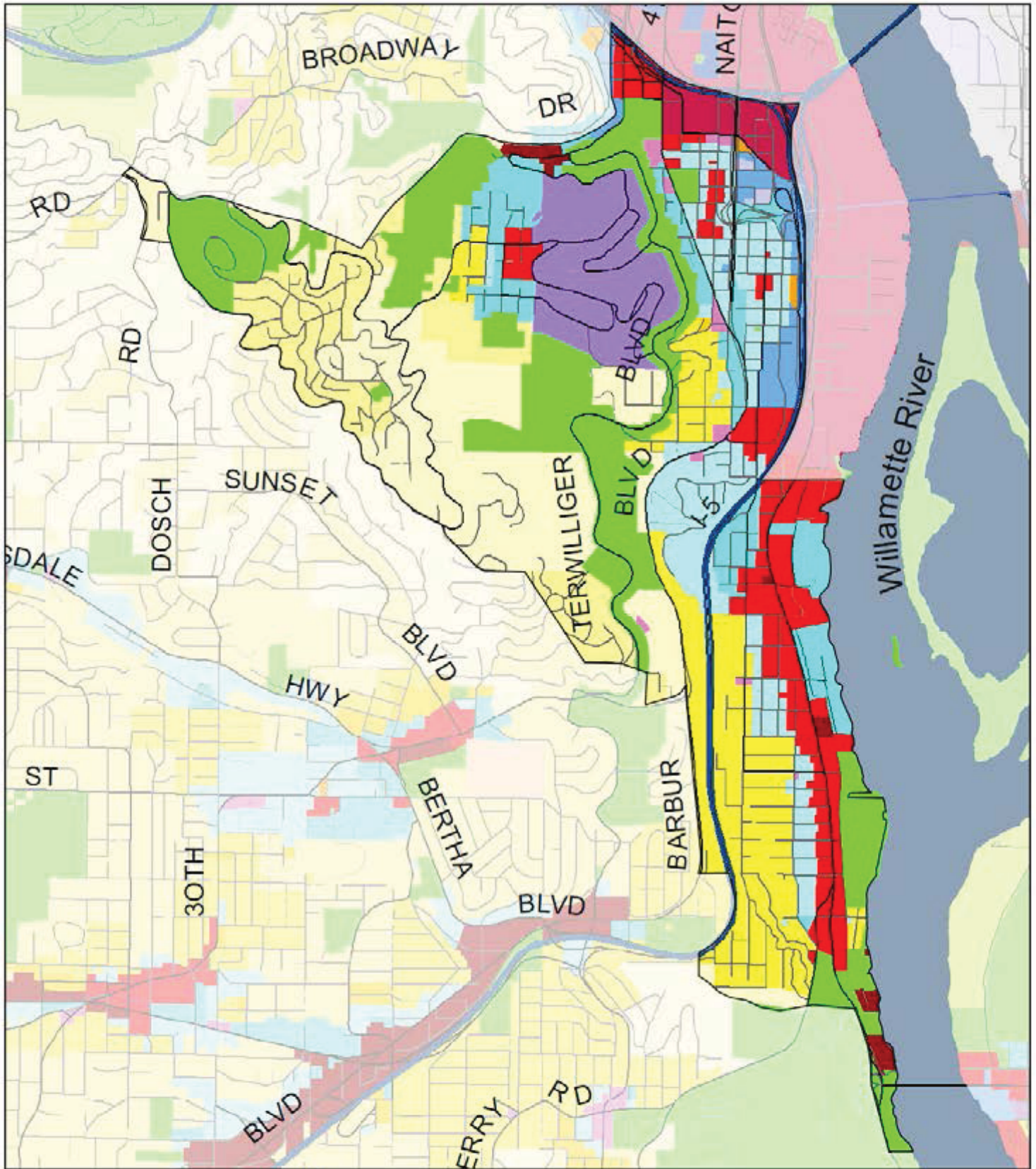
#### Comprehensive Plan Designations Map *(next page)*

##### 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                         |



# South Portland-Marquam Hill Analysis Area



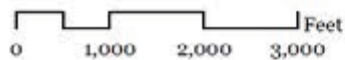
## Comprehensive Plan Designations

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 |    |

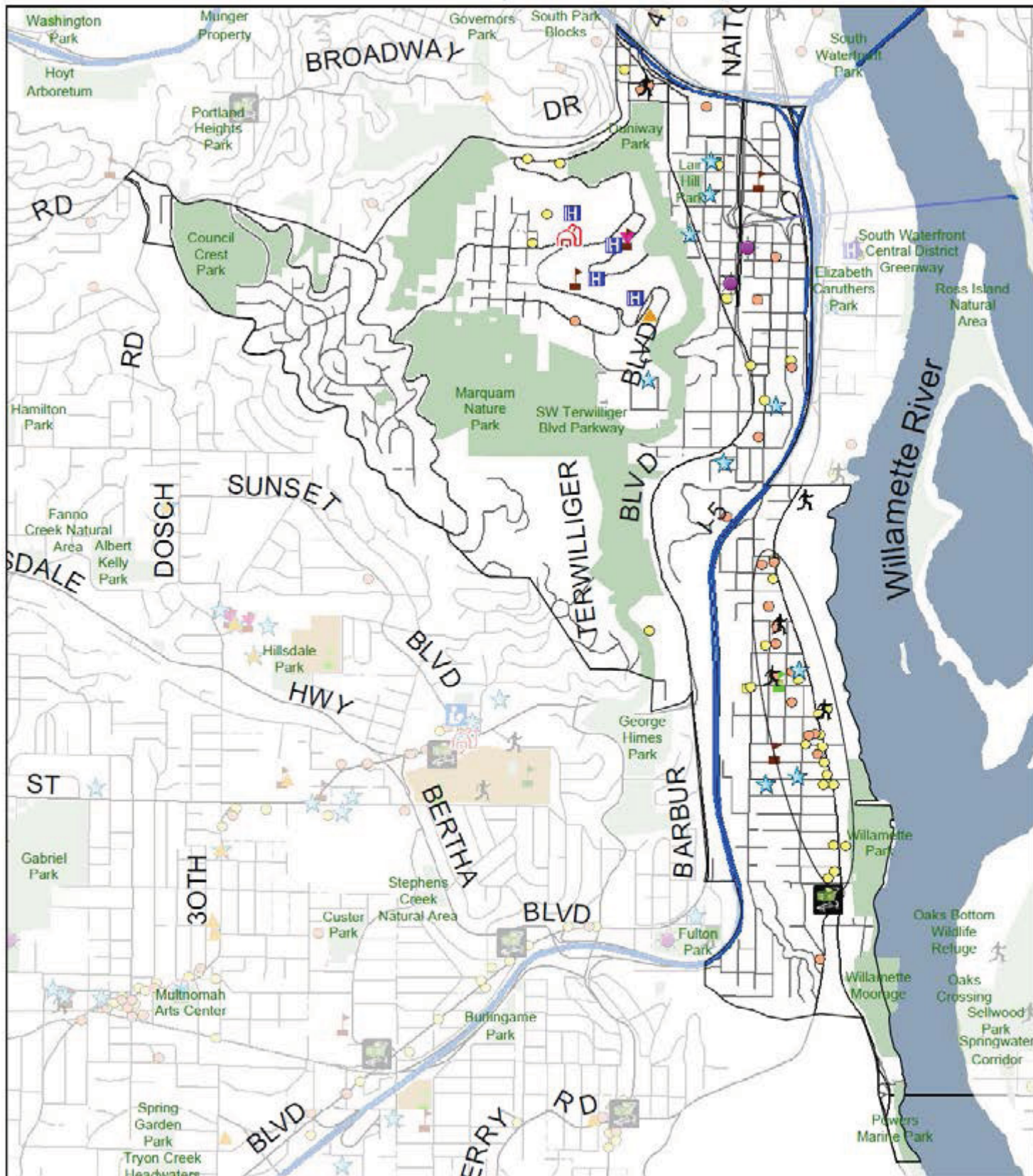


Bureau of Planning and Sustainability  
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City of Portland, Oregon  
Sam Adams, Mayor • Susan Anderson, Director

# South Portland-Marquam Hill 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
- Preschools
- Daycare Centers
- Public HS
- Public K-8
- Private Schools
- County Aging Services

NORTH

0 1,000 2,000 3,000 Feet

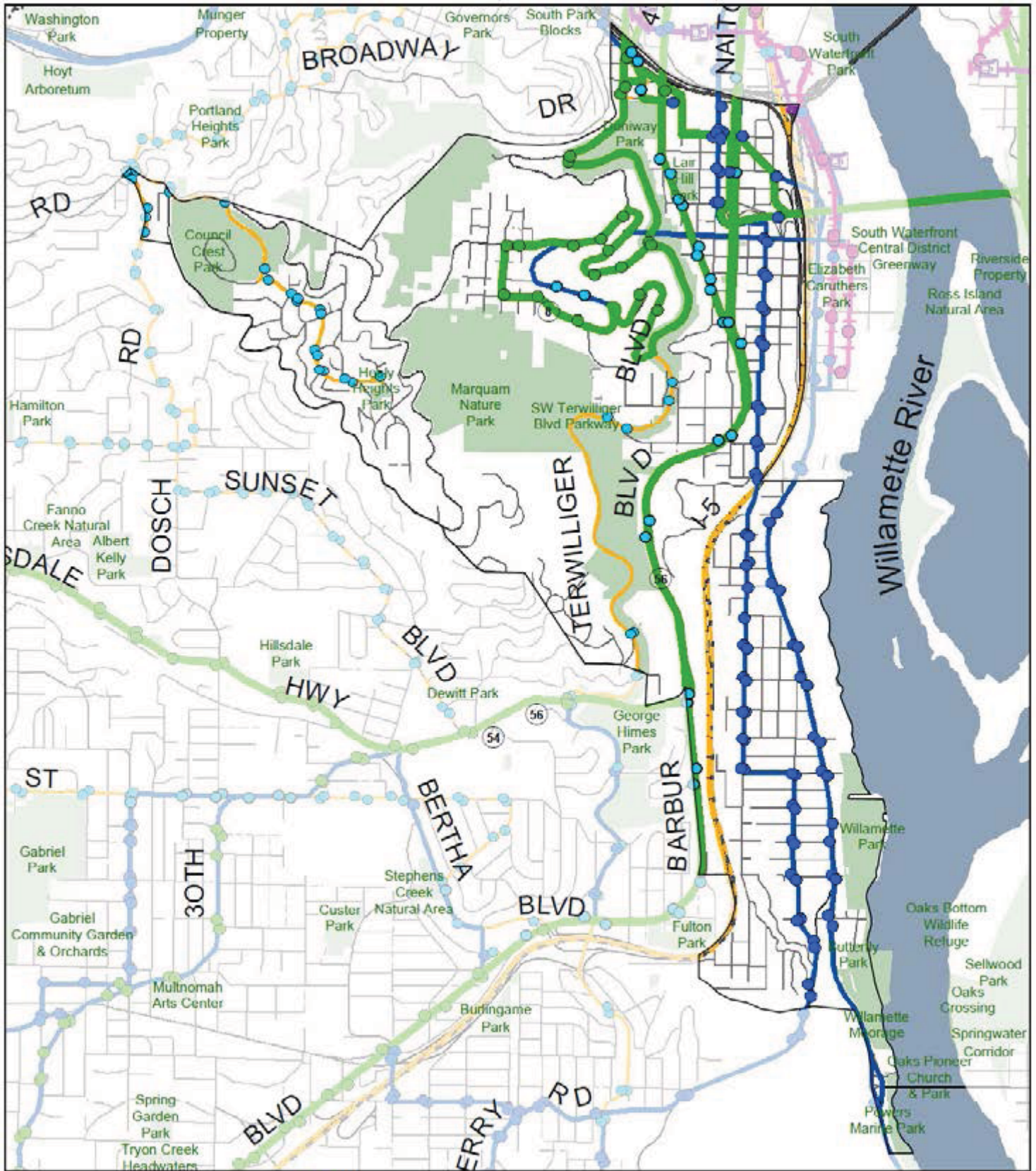


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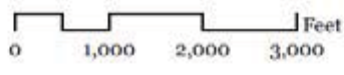
City of Portland Oregon  
Joni Adams Foster - Jane Anderson, Director

# South Portland-Marquam Hill Analysis Area



## Transit Infrastructure

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



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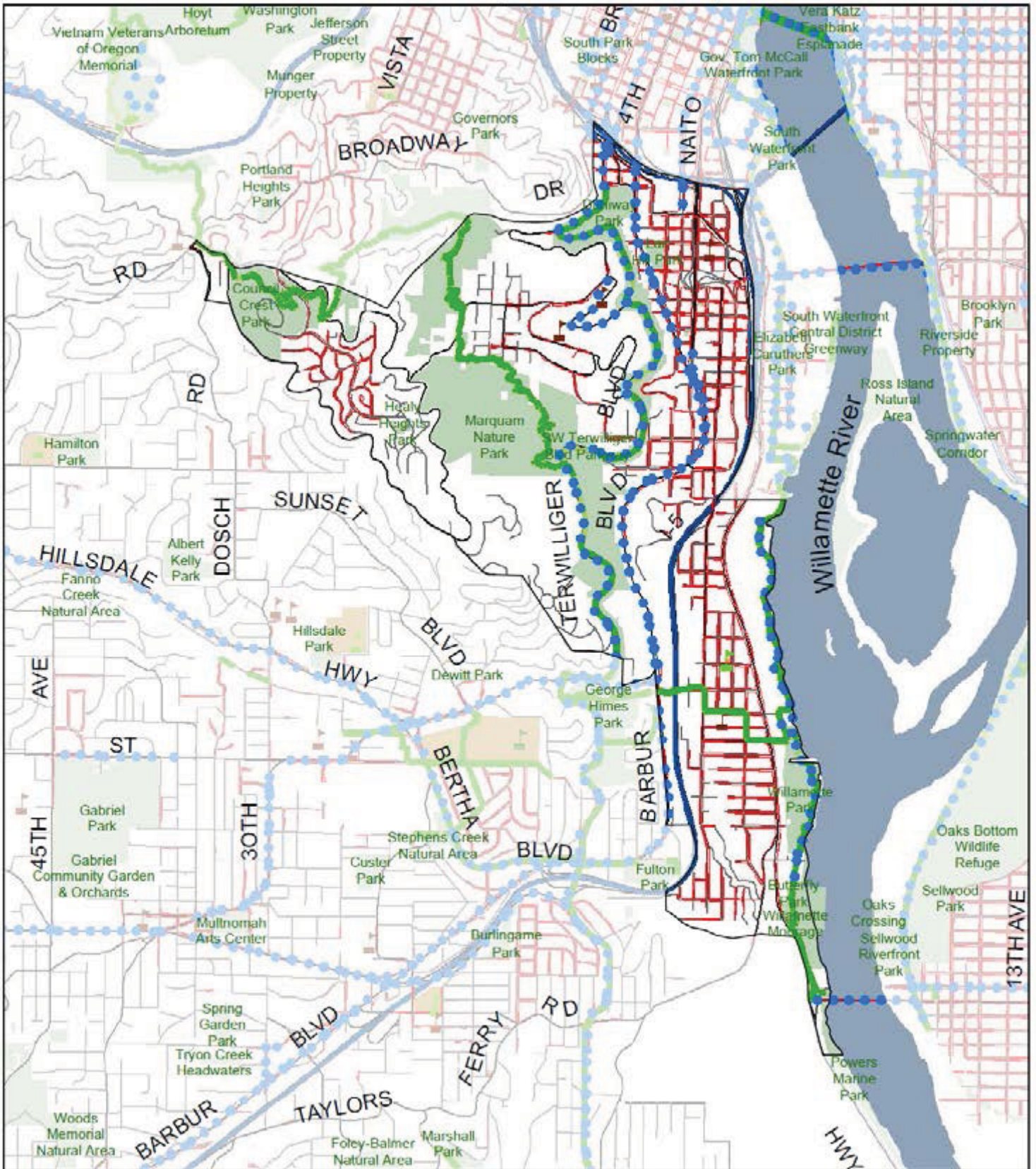


City of Portland, Oregon  
Ben Adams, Mayor · Jason Anderson, Director

August 9, 2011

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# South Portland-Marquam Hill Analysis Area



## Sidewalks and Bicycle Infrastructure

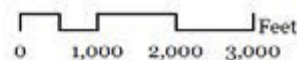
August 9, 2011

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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

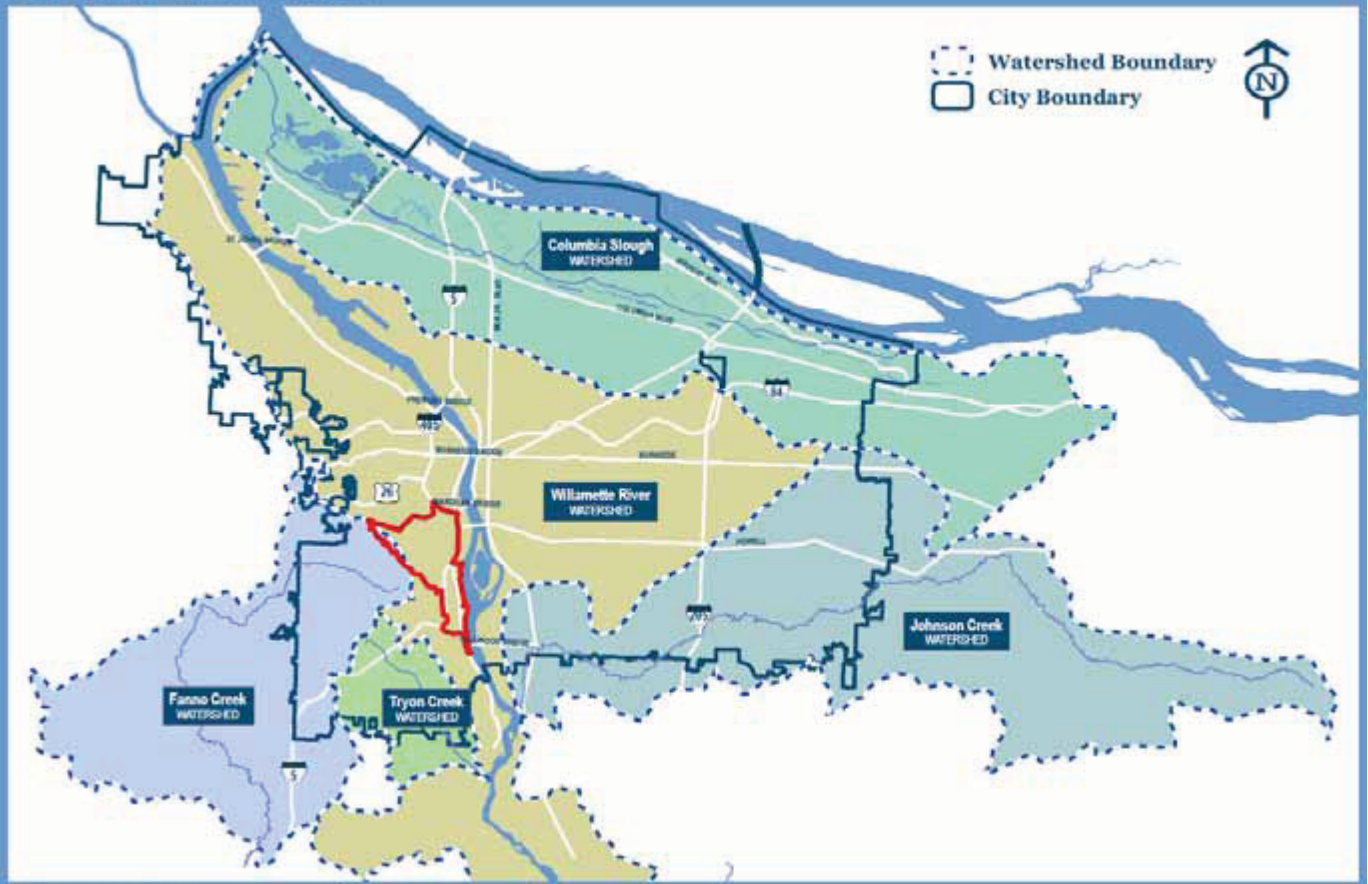


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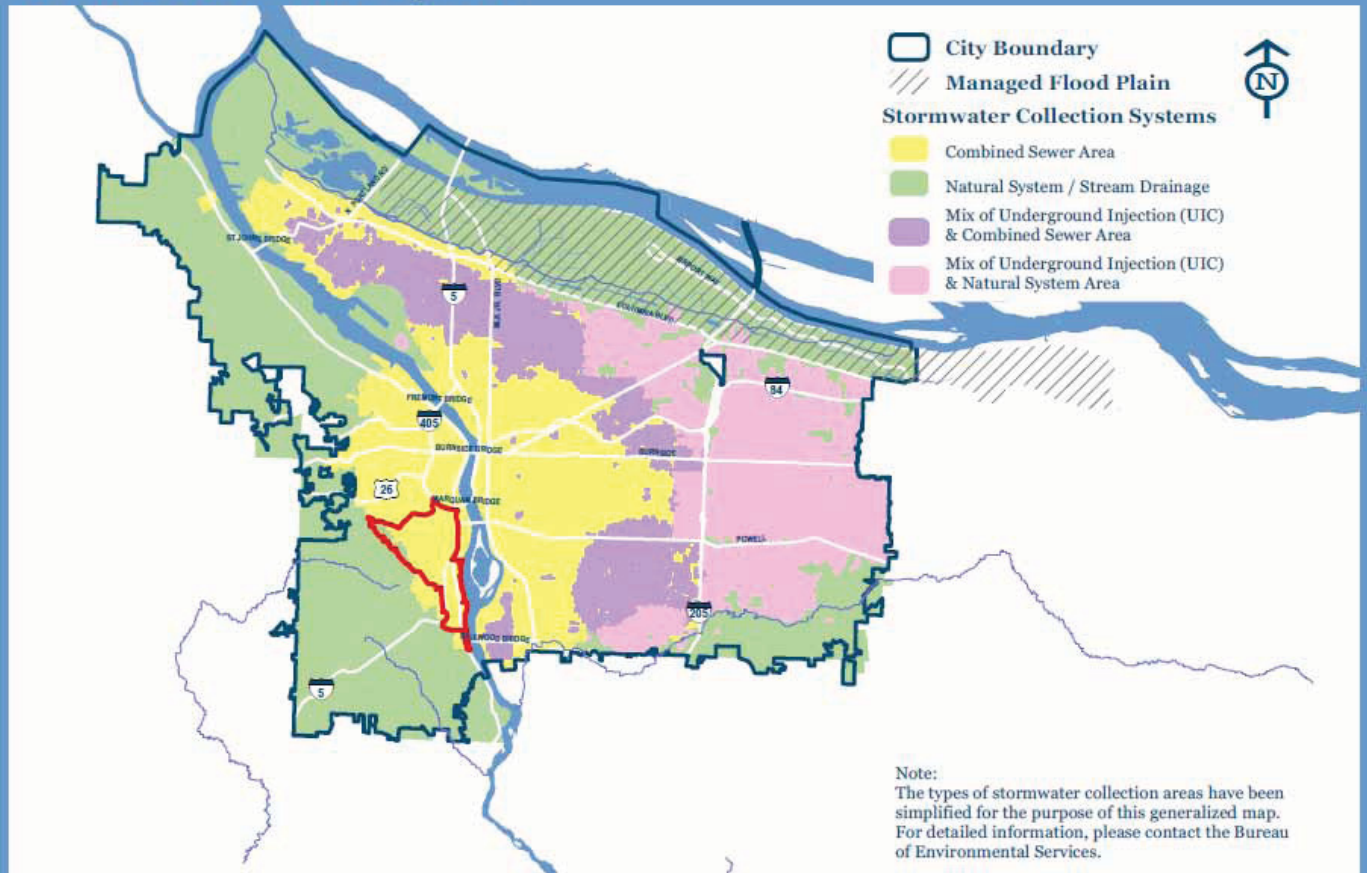


City of Portland  
Don Adams, Mayor · Jean Anderson, Director

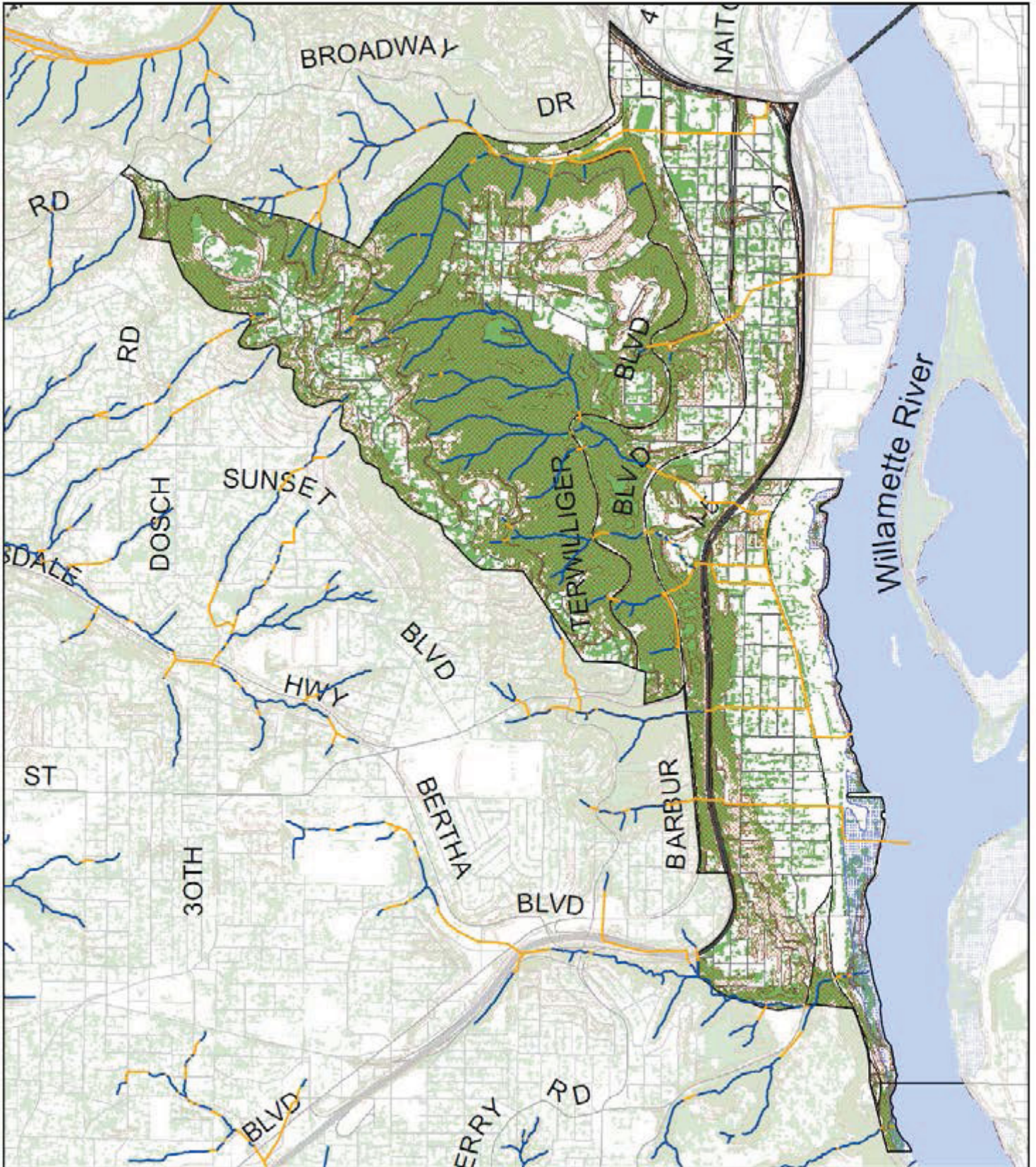
## Portland Watersheds



## Portland Stormwater System



# South Portland-Marquam Hill Analysis Area



## Watersheds and Natural Features

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



August 9, 2011

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# South Portland-Marquam Hill Analysis Area

## Demographics (2000 – 2010)

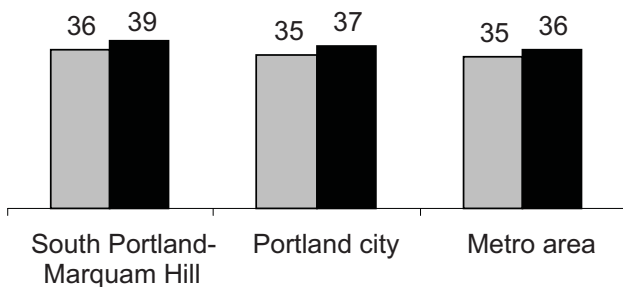
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

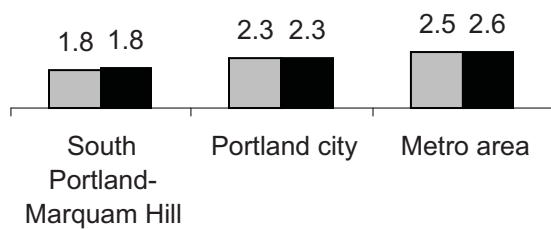
|          | South Portland-Marquam Hill | Portland city | Metro area |
|----------|-----------------------------|---------------|------------|
| 2010     | 8,367                       | 583,776       | 2,226,009  |
| 2000     | 8,136                       | 529,121       | 1,927,881  |
| % change | 3%                          | 10%           | 15%        |

■ 2000 ■ 2010

### Median Age

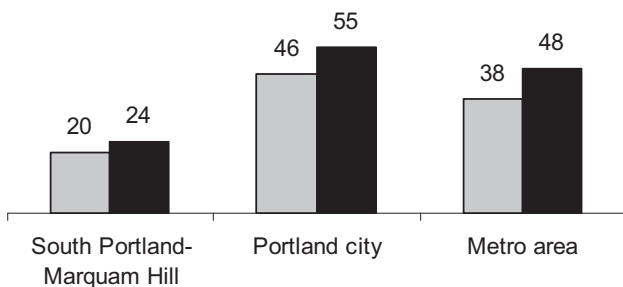


### Average Household Size

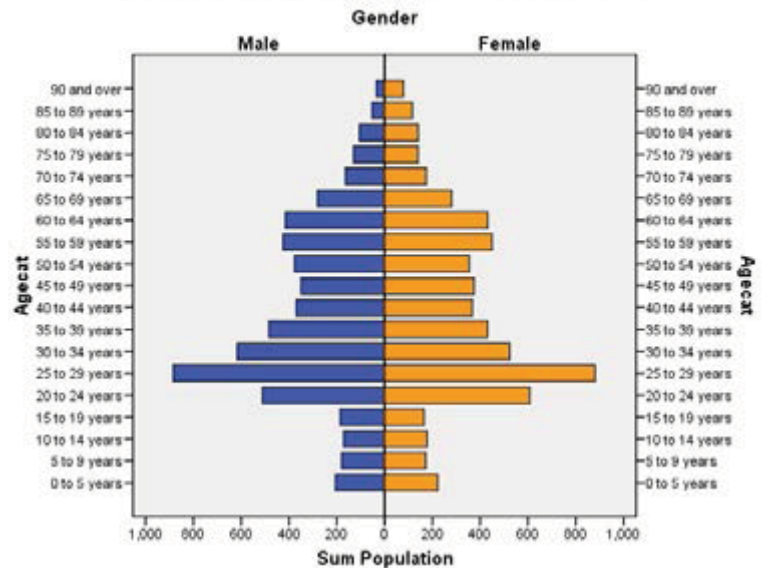


### Diversity Index

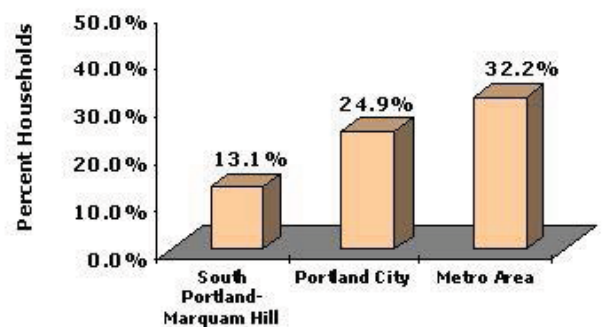
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



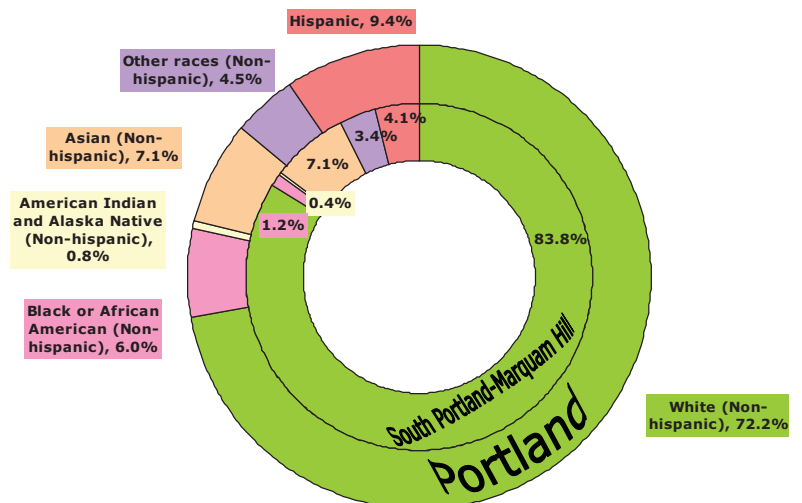
Population Pyramid for South Portland-Marquam Hill, 2010



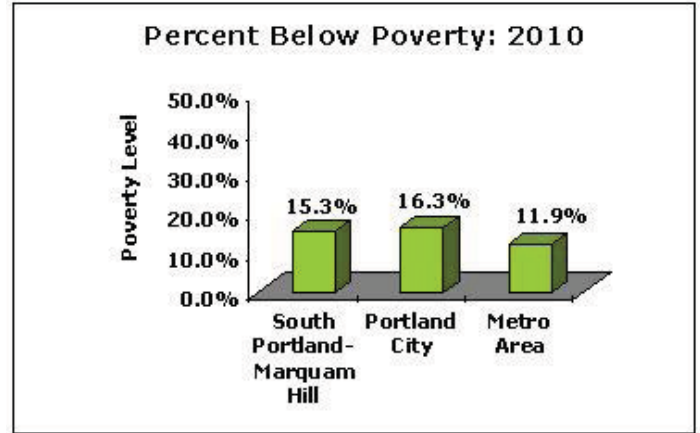
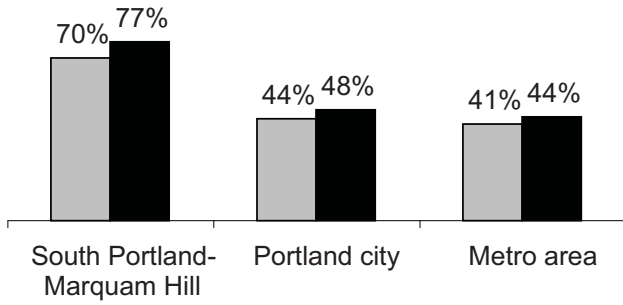
Households with Children Under 18 Years: 2010



Racial and Ethnic Distribution in Portland vs. South Portland-Marquam Hill

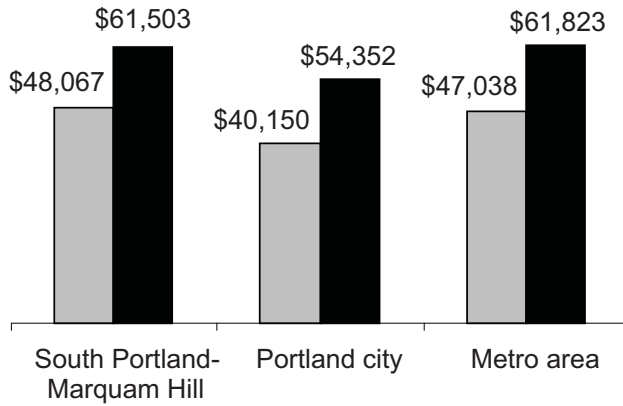


### Percent College Graduates

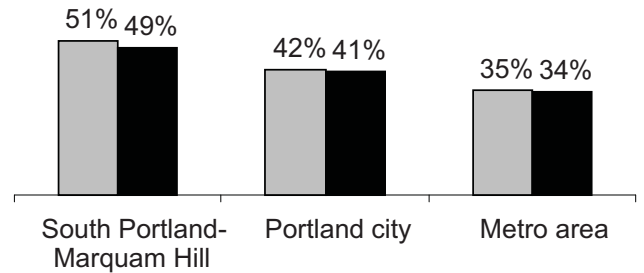


ACS 2006-2010

### Median Household Income



### Percent Renters of Occupied Housing Units



### Median Home Value

|          | South Portland-Marquam Hill | Portland city | Metro area |
|----------|-----------------------------|---------------|------------|
| 2010     | \$429,056                   | \$253,184     | \$273,500  |
| 2000     | \$247,132                   | \$154,721     | \$168,347  |
| % change | 73.6%                       | 63.6%         | 62.5%      |



# South Portland-Marquam Hill Analysis Area

## Commercial Real Estate Indicators

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

Source: COSTAR

### RETAIL

#### Square Feet

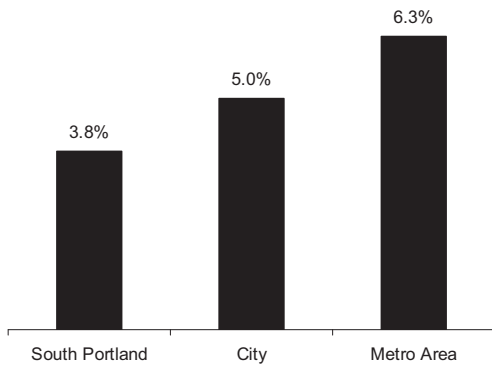
| So. Portland | City       | Metro Area  |
|--------------|------------|-------------|
| 574,840      | 51,937,895 | 107,875,146 |

### RETAIL

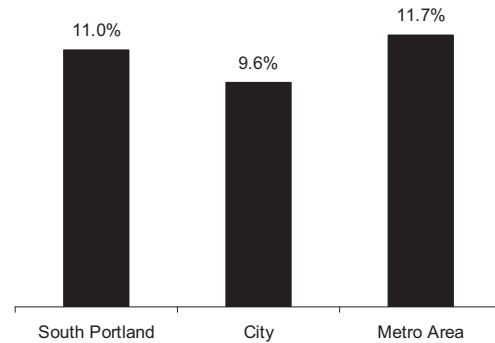
#### Square Feet

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

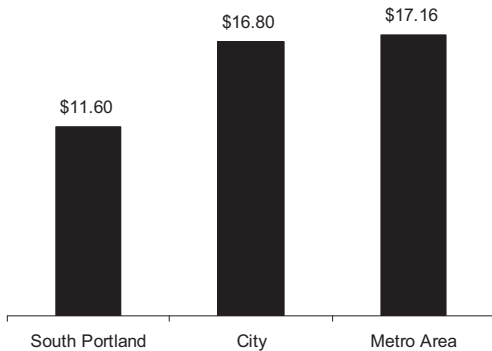
#### Retail Vacancy



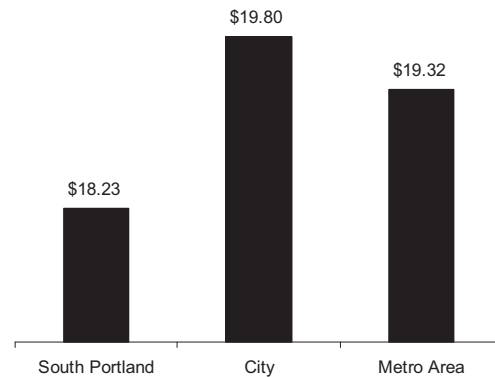
#### Office Vacancy



#### Retail Rents



#### Office Rents



### OFFICE SPACE

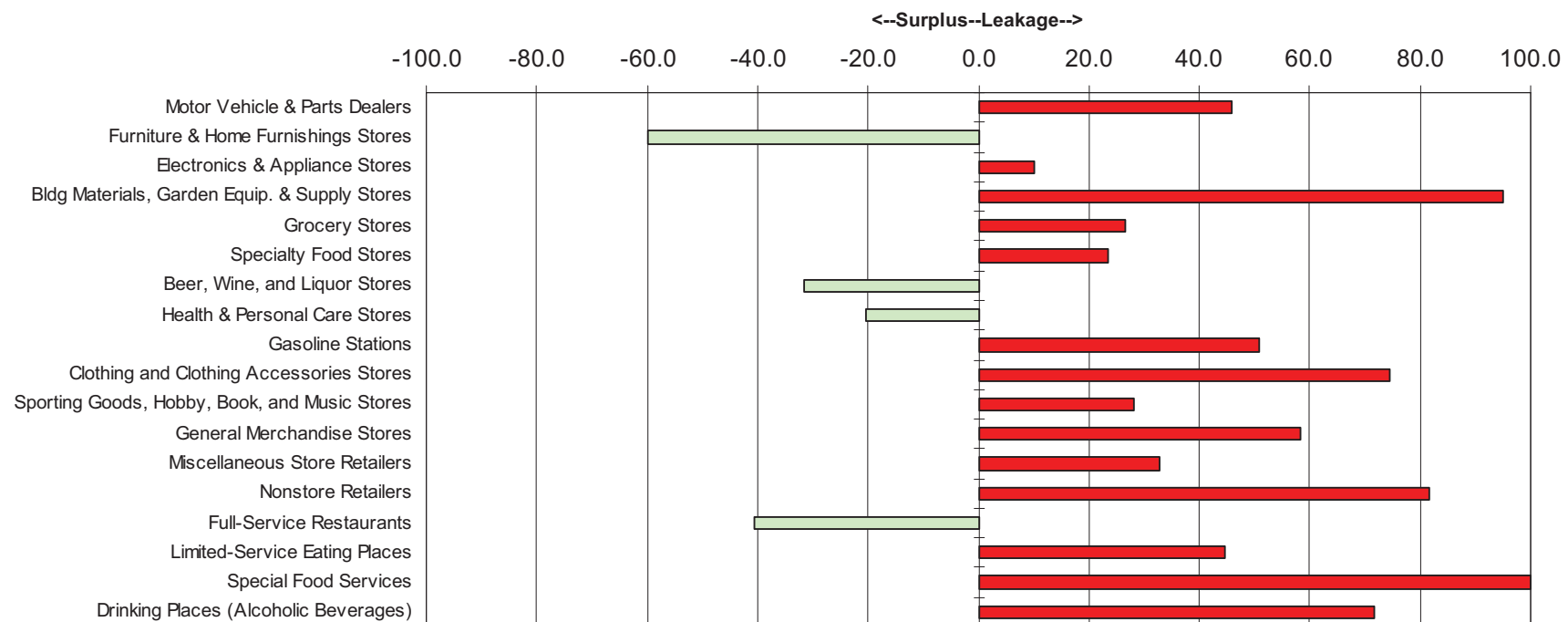
# South Portland-Marquam Hill Analysis Area

## Retail Market Profile

**Retail Gap = \$61 million**

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

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)



# South Portland-Marquam Hill Analysis Area

## Employment

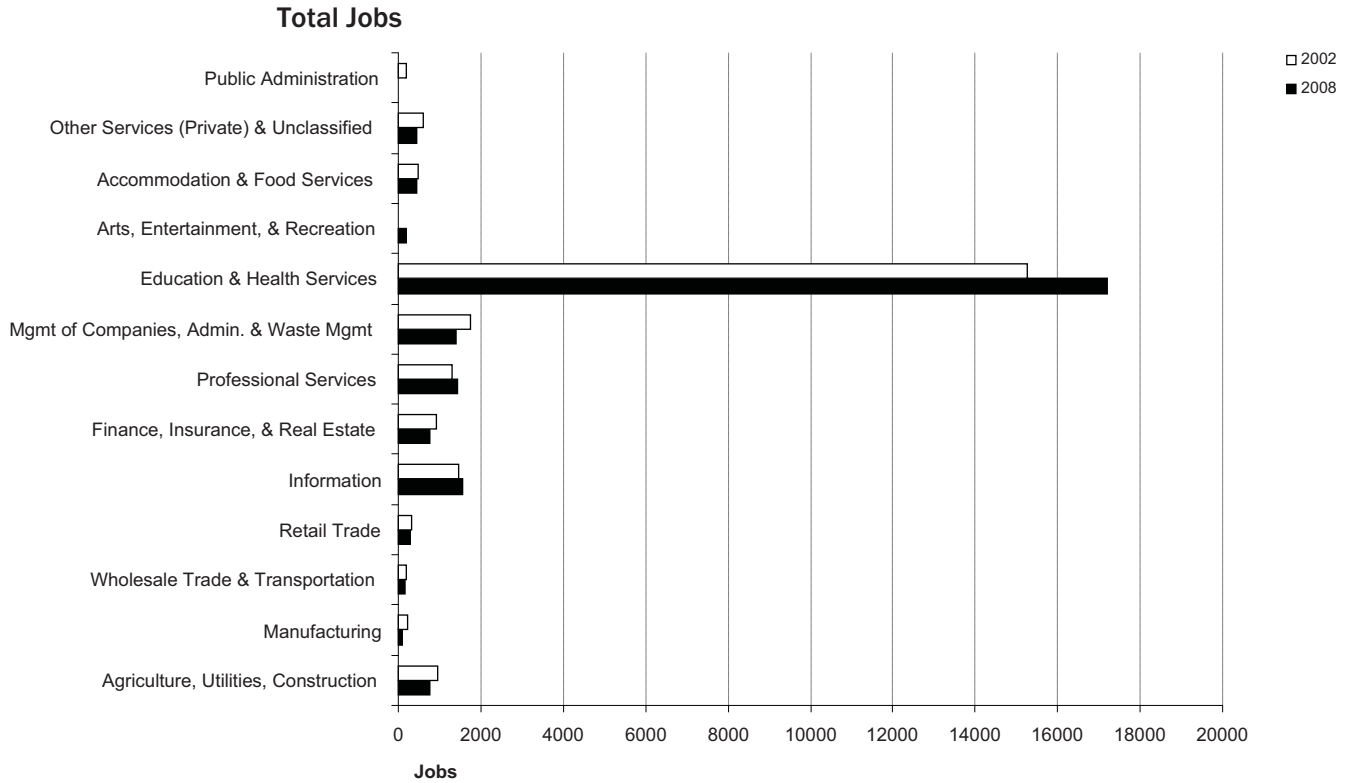
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

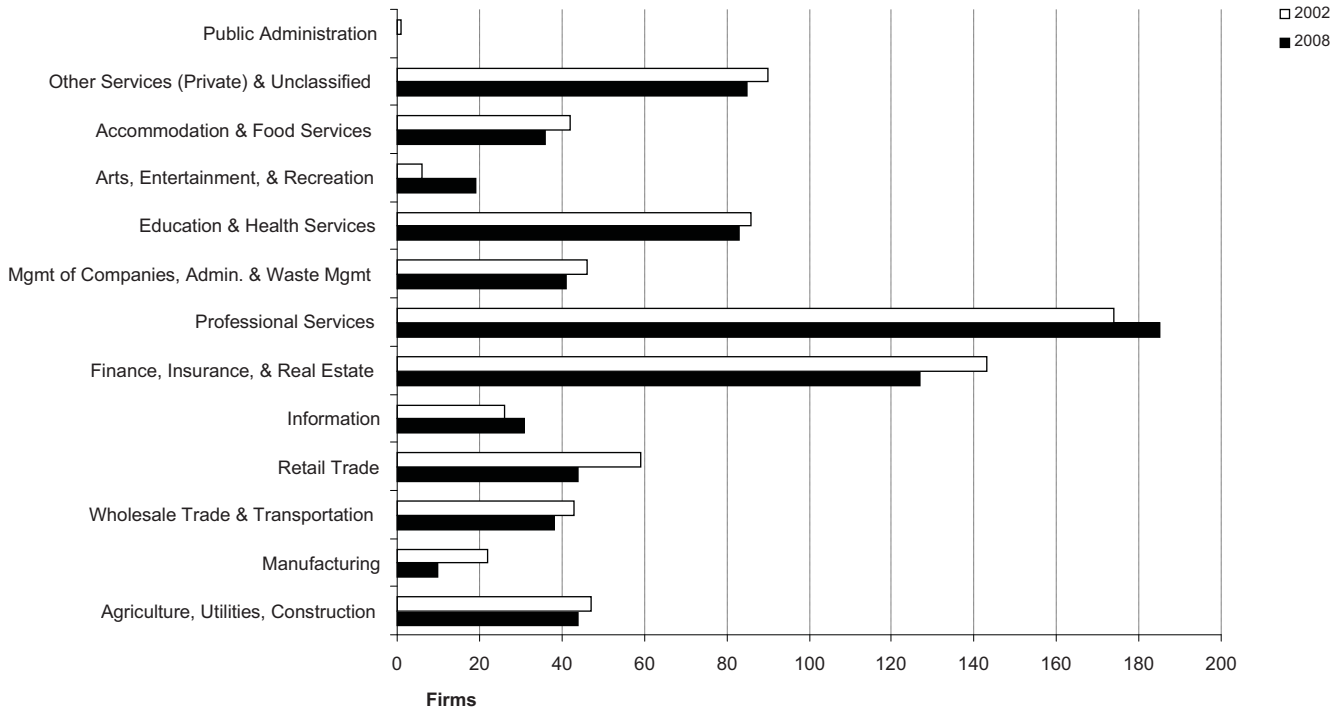
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

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.

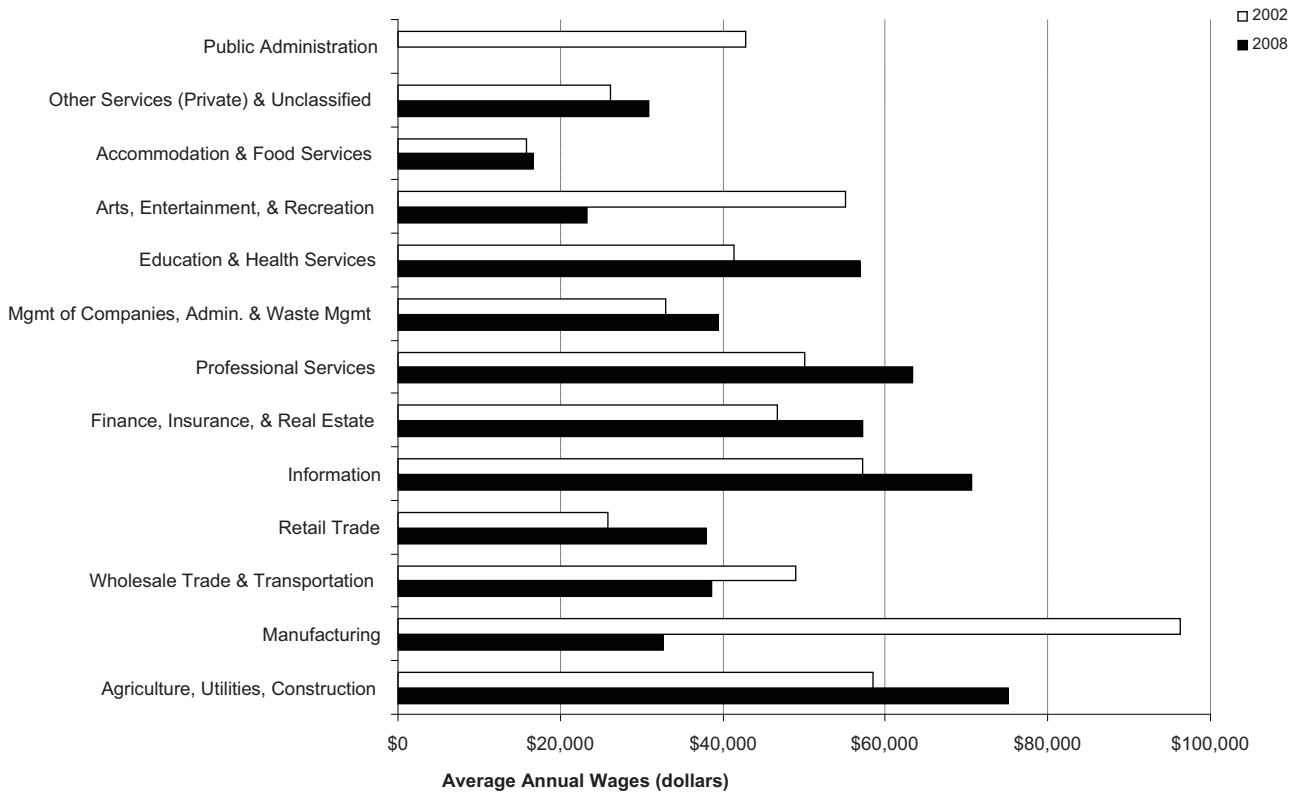
|                      | 2002     | 2008     | change  |
|----------------------|----------|----------|---------|
| Total Jobs           | 23,661   | 24,758   | +1,094  |
| Total Firms          | 785      | 743      | - 42    |
| Average Annual Wages | \$42,584 | \$56,058 | +13,474 |



**Total Firms**



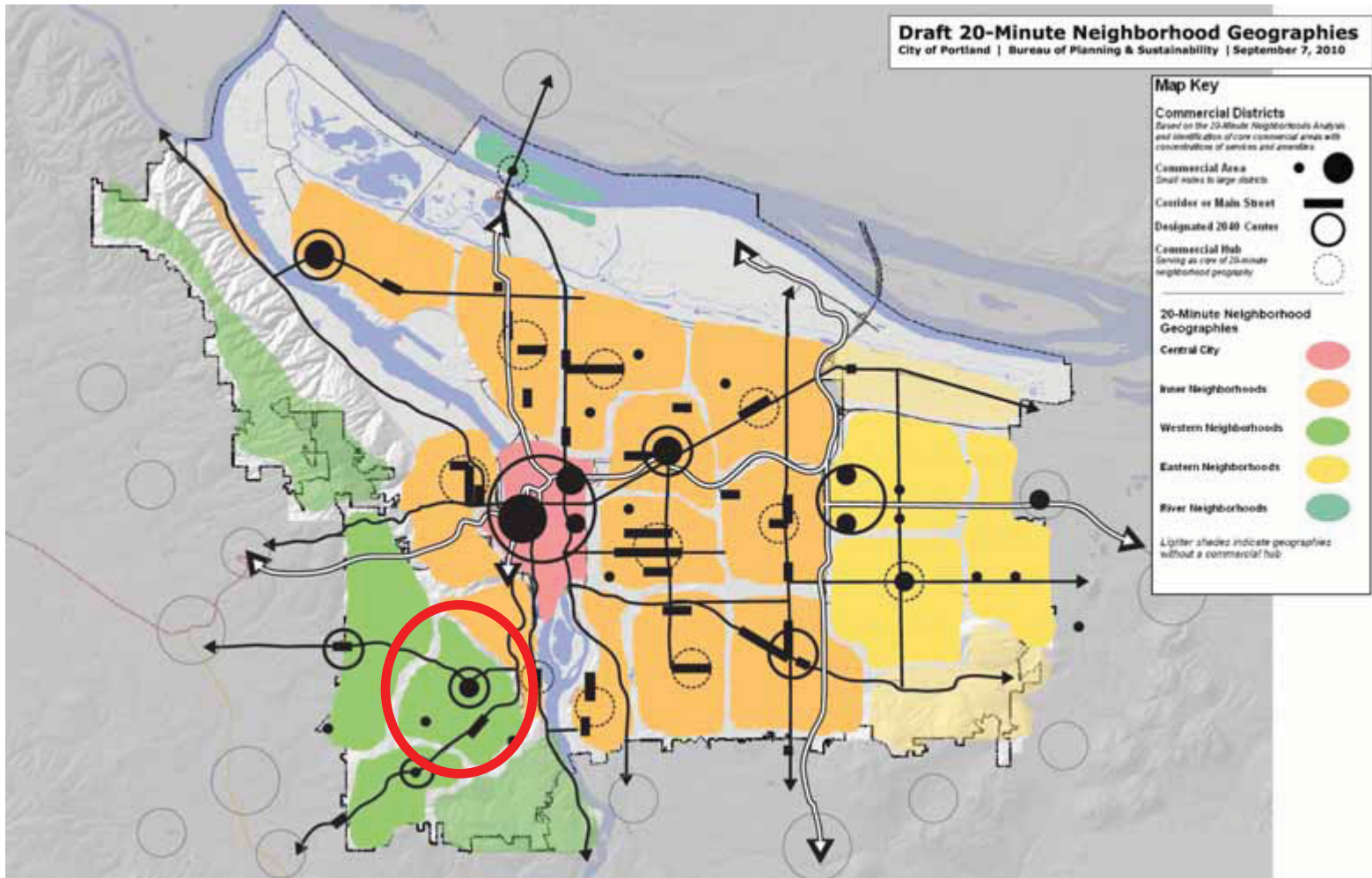
**Average Annual Wages**



## Hillsdale-Multnomah-Barbur Analysis Area

Including Hillsdale, Multnomah, South Burlington, and parts of the Markham and Marshall Park 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.*

# Hillsdale-Multnomah-Barbur Analysis Area

## Services and Amenities

Population: 19,800 people (9,100 households)  
 Land Area: 4.3 sq. miles (4,600 people per sq. mile)

### Commercial Districts

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

**Grocery stores:** 4 (1 store per 2,275 households)

**Retail gap:** \$128 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*:                         | 77%  |
| Within 1/2 mile of a public elementary school:      | 17%  |
| Within 3 miles of a full-service community center*: | 100% |
| Within 1/2 mile of a full-service grocery store:    | 21%  |
| Within 1/4 mile of a frequent service transit stop: | 5%   |

*\*Parks Bureau service standard*

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

**Libraries:** 1 (Hillsdale Library)

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

**Tree Canopy Coverage:** 40%

**Public Schools:** 1 high school (Wilson)  
 4 K-8 schools (Rieke, Capitol Hill, and Maplewood\* elementary schools, Gray Middle School)  
*\*At edge of analysis area*

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** 1 (Hillsdale Farmers Market)

**Transit Centers/Stations:** None

**Walkable Access Score:** 40 (out of 100)  
*(from 20-Minute Neighborhoods Analysis Index)*

### Neighborhood and Business Associations

**Neighborhood Associations:** Hillsdale, Multnomah, South Burlington, and parts of Markham and Marshall Park

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

## Urban Form Characteristics

Natural features are prominent characteristics of this area, including gently-rolling hills, forested slopes, and occasional streams and ravines. The area is primarily composed of residential neighborhoods, which include a mix of rectilinear blocks and curvilinear streets that follow the area’s hilly topography. Most streets do not have sidewalks. The area includes a small number of commercial areas, including Multnomah Village, with its Streetcar Era storefront buildings, and more auto-oriented commercial areas in Hillsdale and along Barbur Boulevard.

**Access issues.** Most of the area lacks good street connectivity and most streets do not have sidewalks. Off-street trails provide additional pedestrian connections in some locations. The limited number of commercial areas are beyond walking distance for most residents, and some of these areas have few options for access from nearby residential areas other than major roads that lack continuous pedestrian facilities. The area has relatively low population densities and most residents do not have walkable access to frequent service transit. Topography and other natural features also limit pedestrian and bicycle accessibility in the area.

## 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.*

|                        |  |
|------------------------|--|
| Hillsdale Town Center: | 272 acres  |
| Main Streets:          | .8 mile (Multnomah Blvd & Capitol Hwy [Multnomah Village]) |
| Station Communities:   | 0  |

## Zoning

|                            | Acres | % of Land Area | Buildable Acres* |
|----------------------------|-------|----------------|------------------|
| Single-Family Residential: | 1,532 | 74%            | 299              |
| Multi-Family Residential:  | 227   | 11%            | 52               |
| Commercial/Mixed-Use:      | 110   | 5%             | 57               |
| Employment:                | 0     | 0%             | 0                |
| Industrial:                | 0     | 0%             | 0                |
| Open Space:                | 208   | 10%            | NA               |

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

## Anticipated Growth by 2035

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

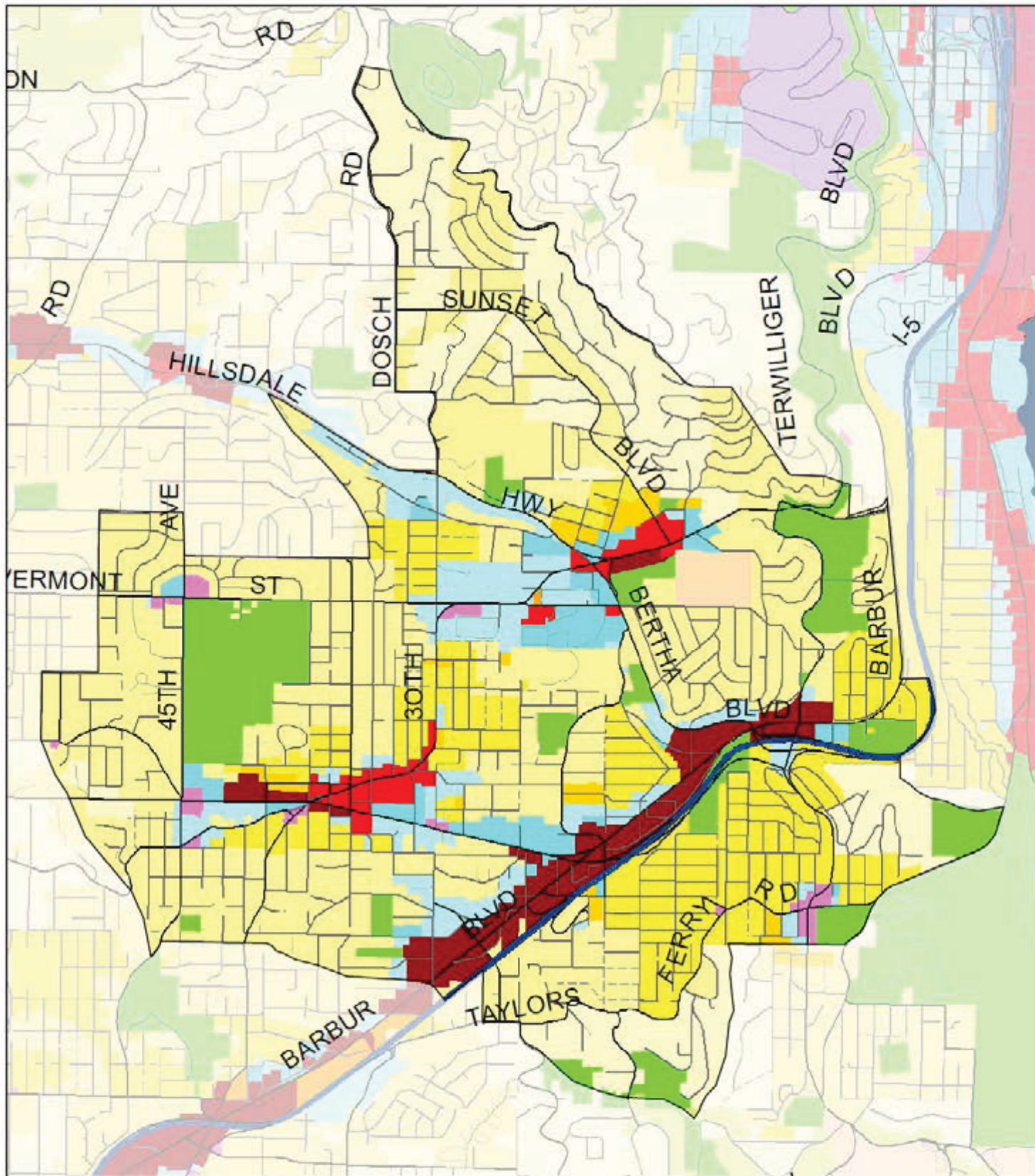
|                              |        |
|------------------------------|--------|
| 2010 Housing Units (Census): | 9,066  |
| 2035 Housing Units:          | 12,900 |

### 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                         |

# Hillsdale-Multnomah-Barbur 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 |    |



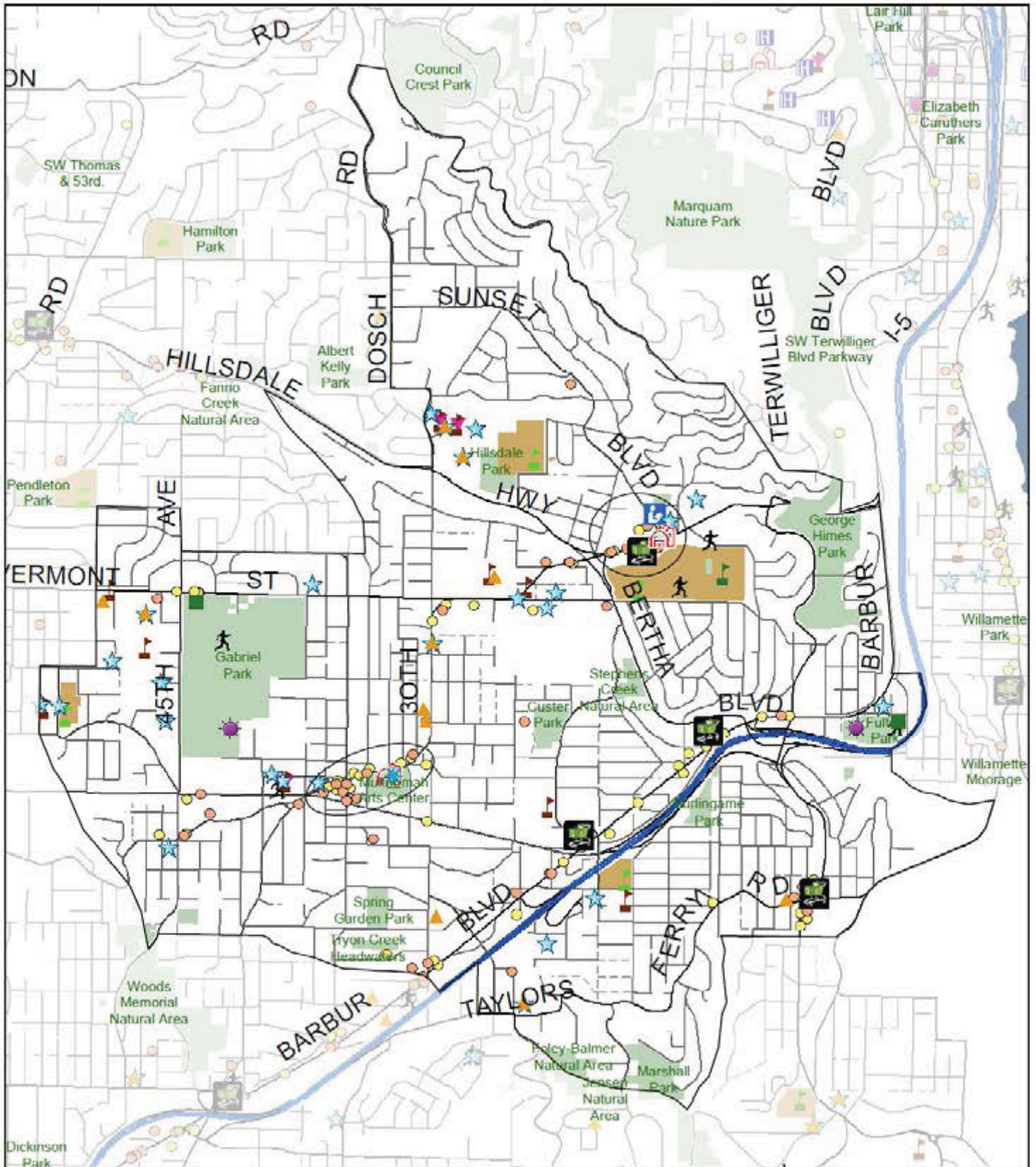
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Sam Adams, Mayor • Jason Anderson, Director



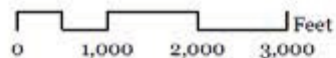
# Hillsdale-Multnomah-Barbur Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

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

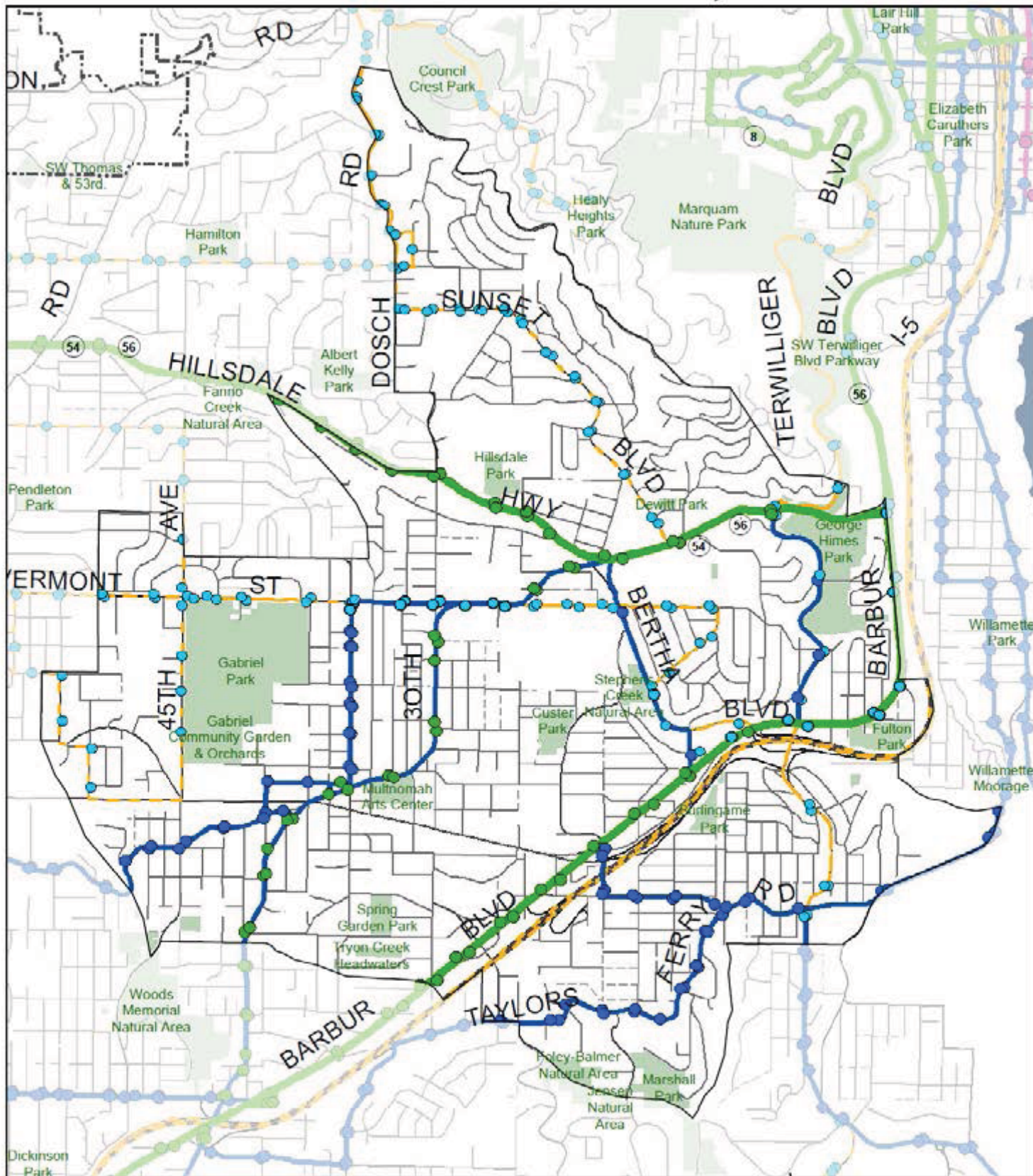


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# Hillsdale-Multnomah-Barbur Analysis Area



## Transit Infrastructure

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



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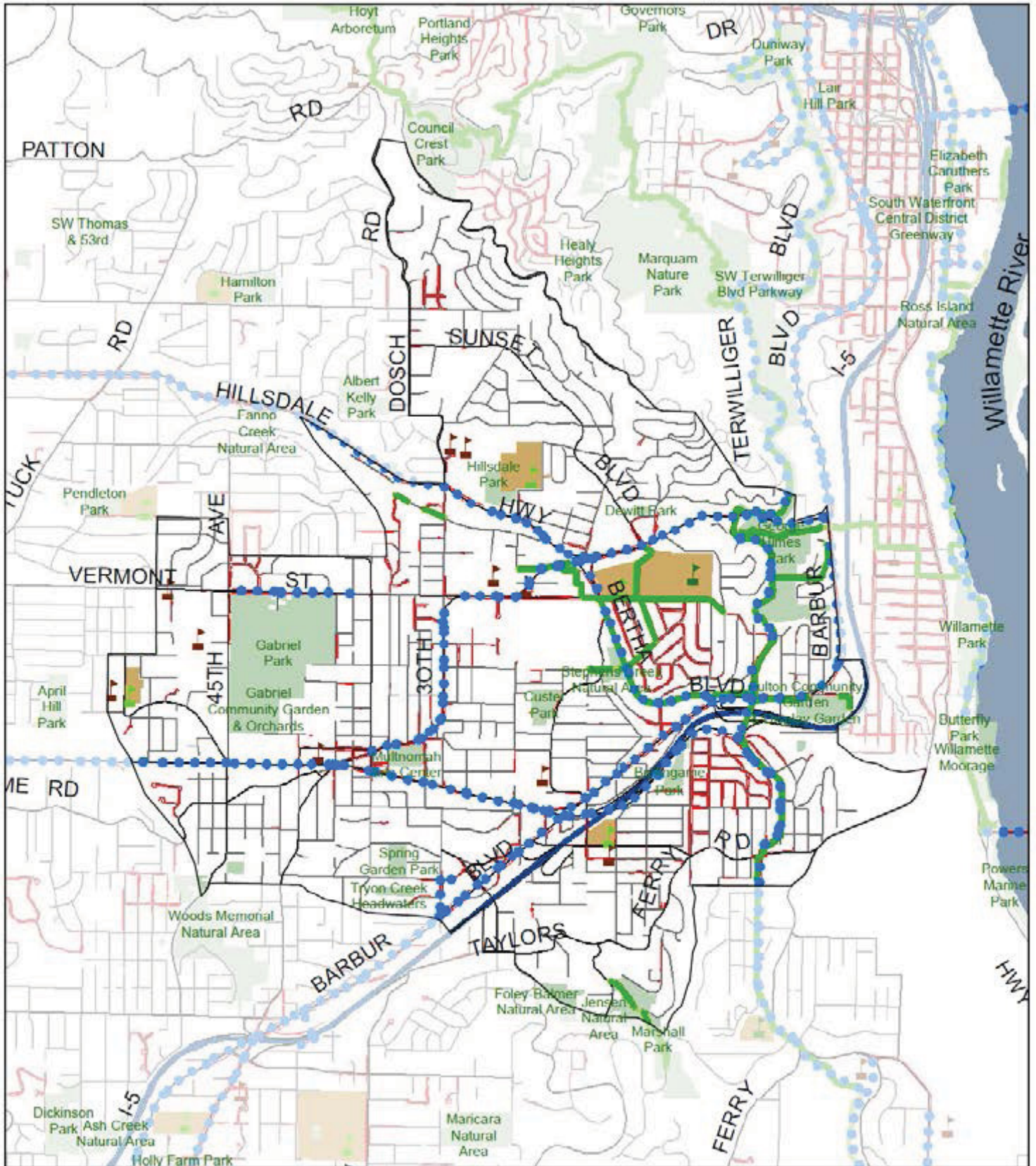


City of Portland, Oregon  
Ann Adams, Mayor · Jason Anderson, Director

August 9, 2011

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# Hillsdale-Multnomah-Barbur 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

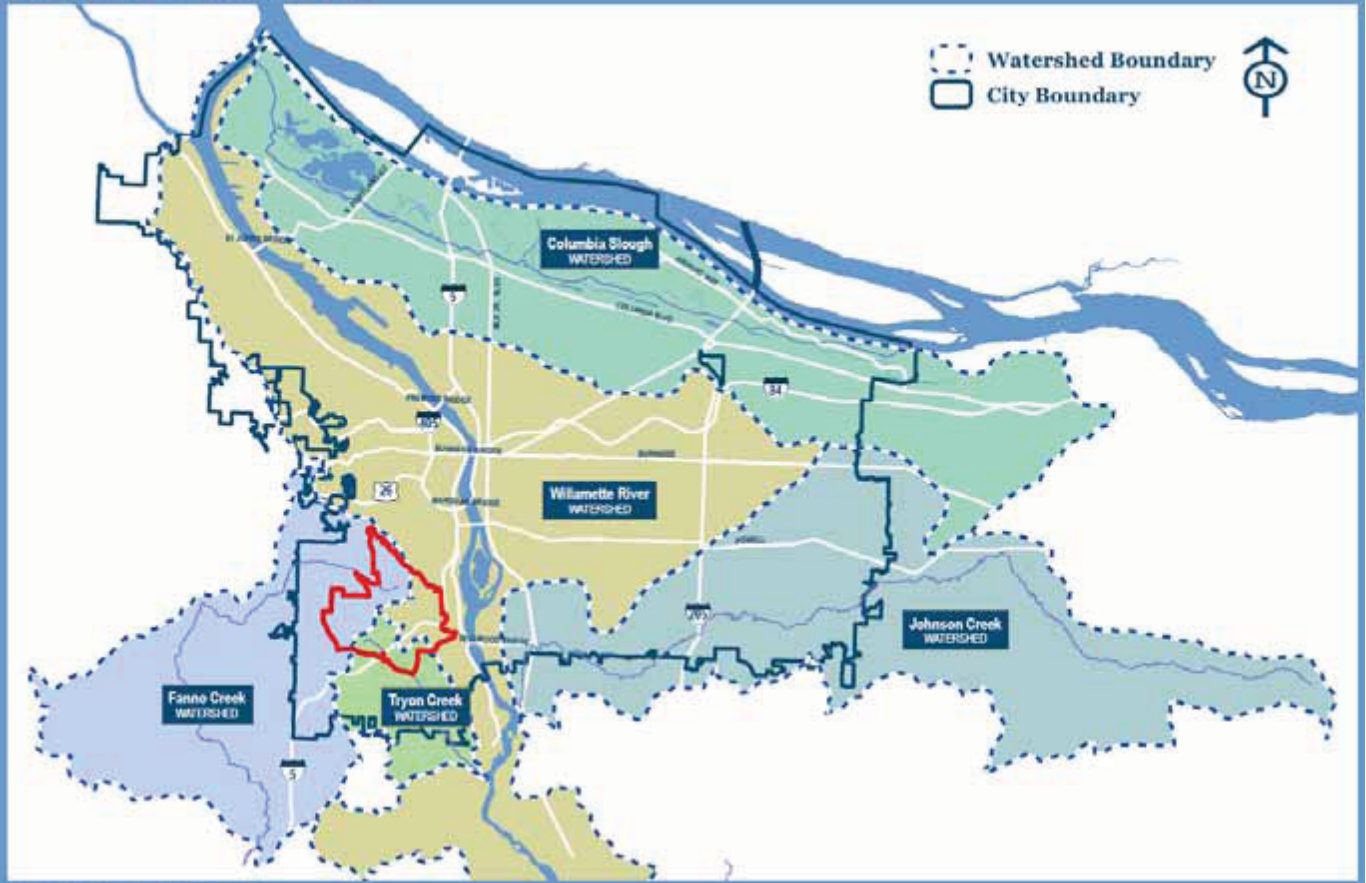


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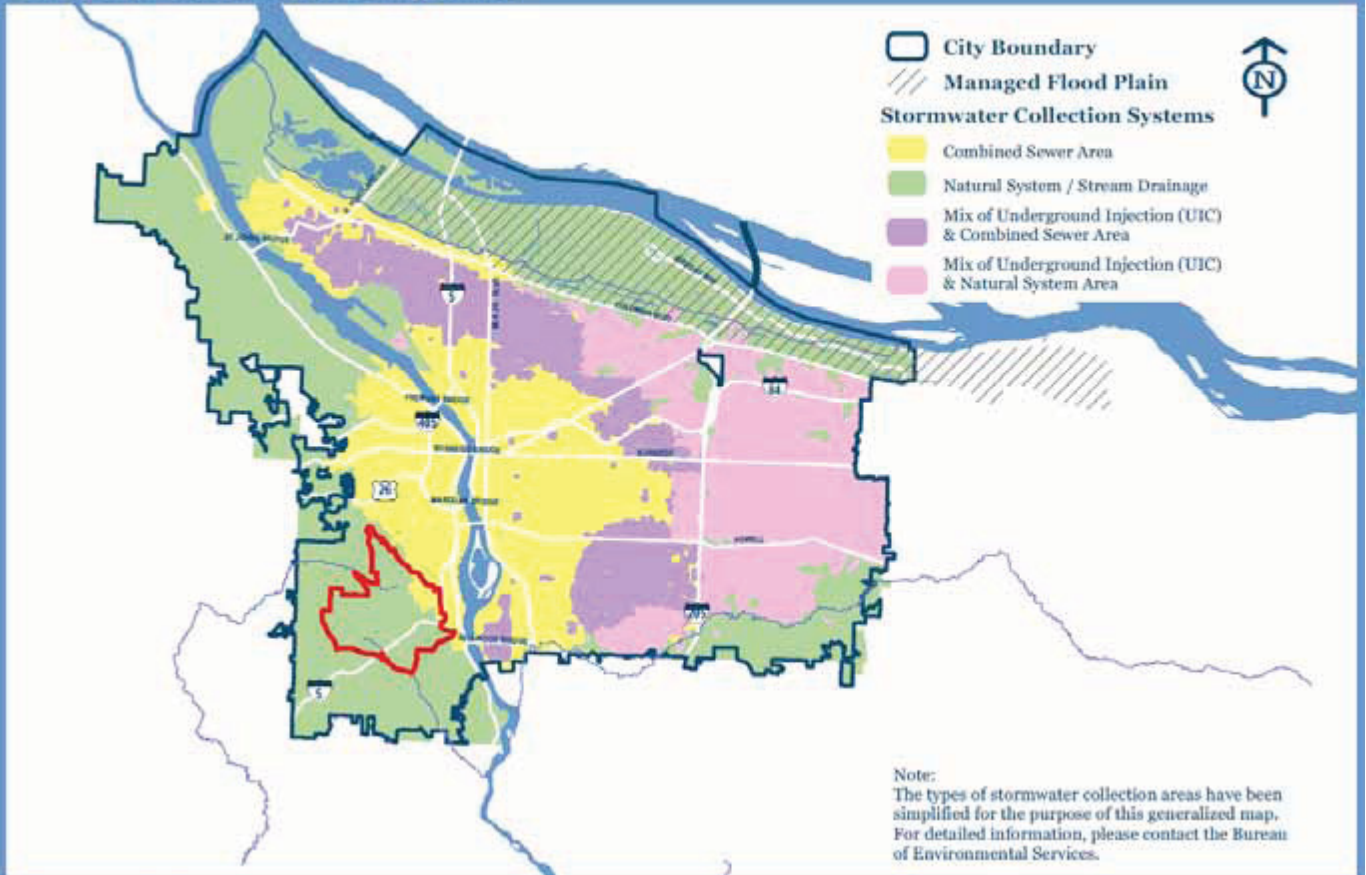


City of Portland, Oregon  
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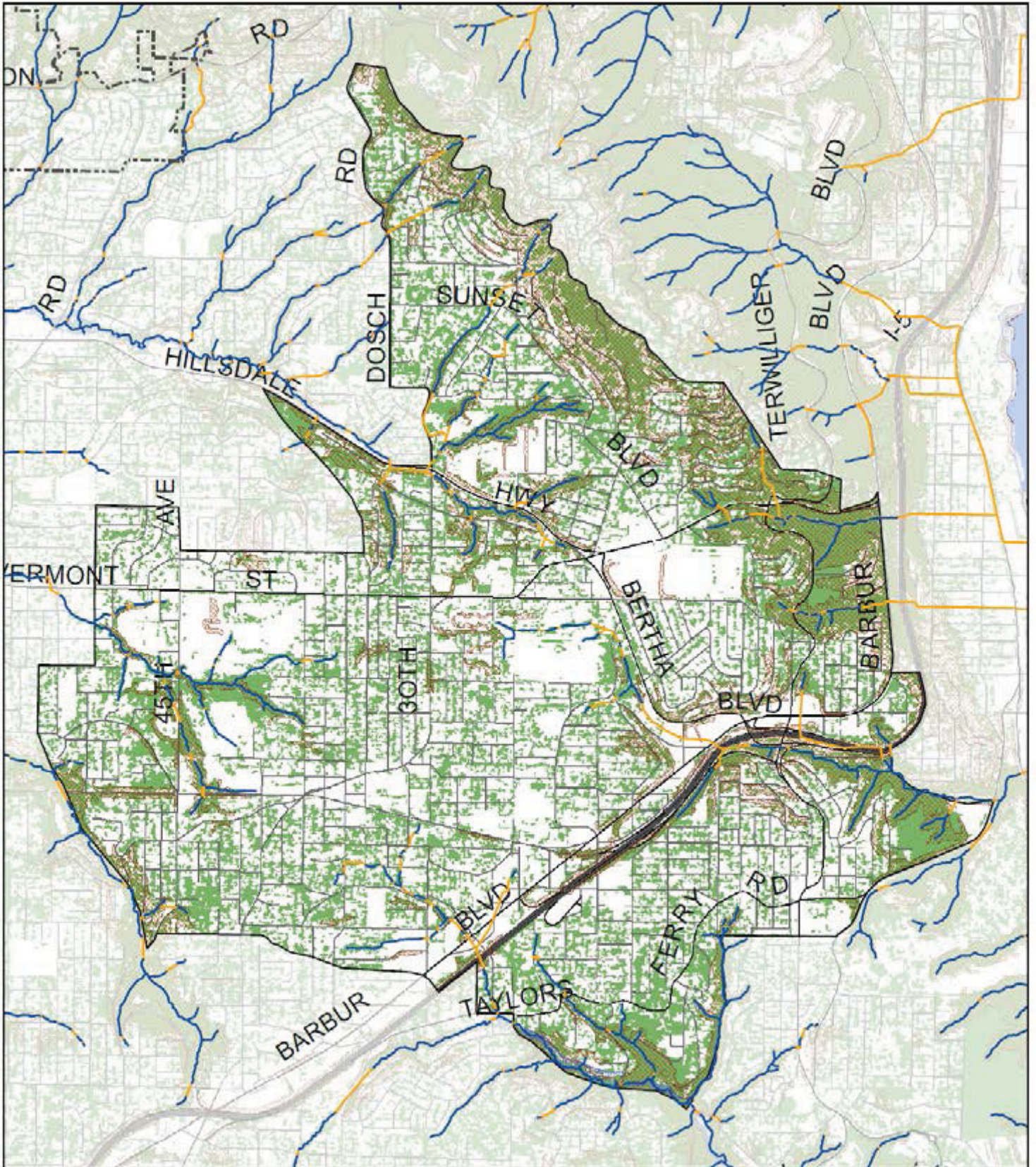
## Portland Watersheds



## Portland Stormwater System



# Hillsdale-Multnomah-Barbur Analysis Area



## Watersheds and Natural Features

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



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August 9, 2011

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# Hillsdale-Multnomah-Barbur Analysis Area

## Demographics (2000 – 2010)

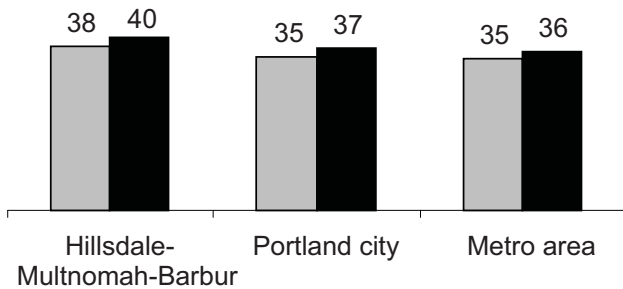
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

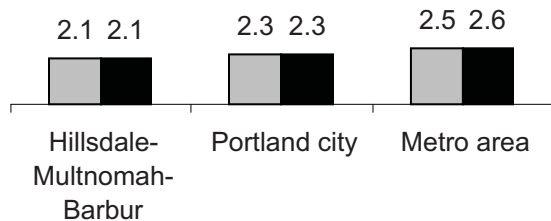
|          | Hillsdale-Multnomah-Barbur | Portland city | Metro area |
|----------|----------------------------|---------------|------------|
| 2010     | 19,795                     | 583,776       | 2,226,009  |
| 2000     | 18,674                     | 529,121       | 1,927,881  |
| % change | 6%                         | 10%           | 15%        |

■ 2000 ■ 2010

### Median Age

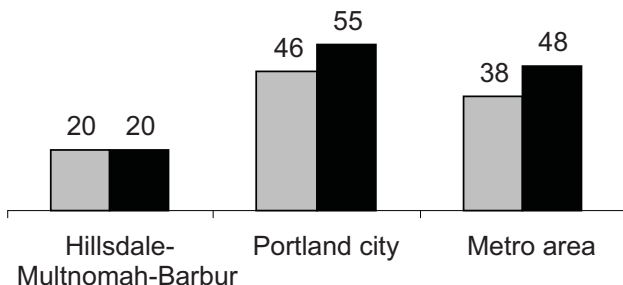


### Average Household Size

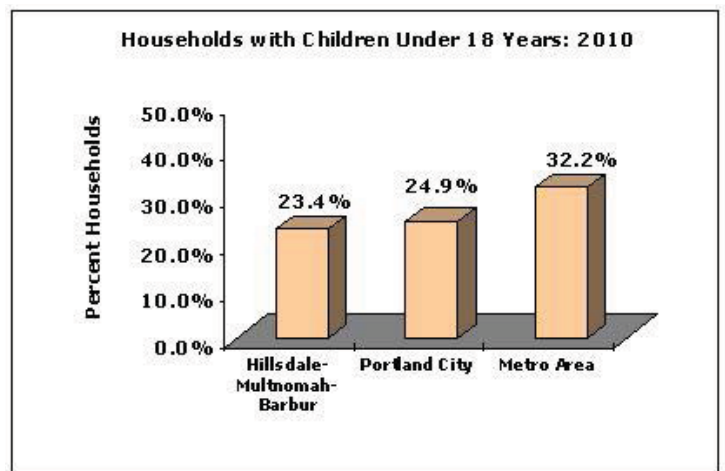
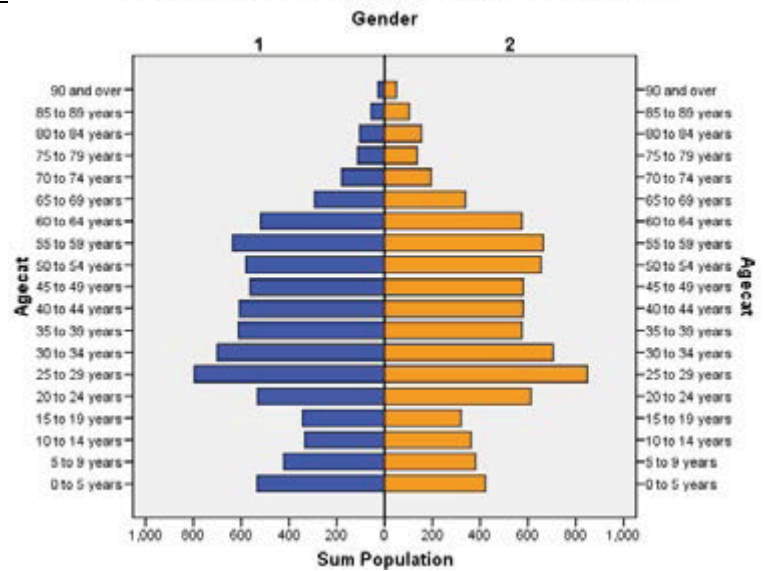


### Diversity Index

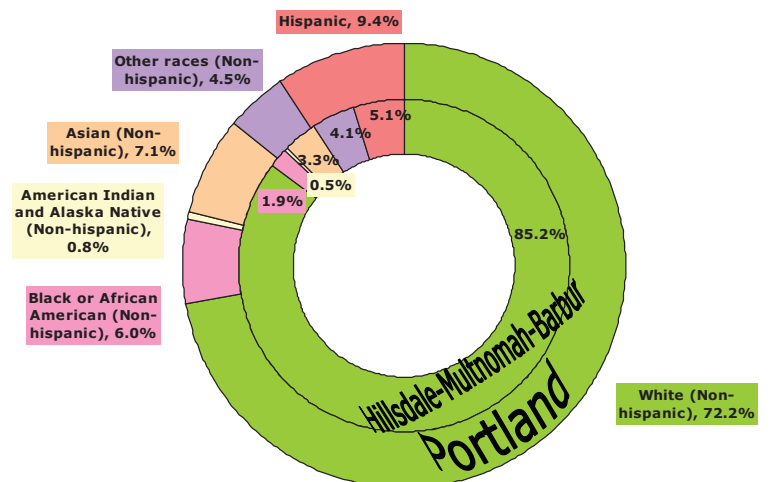
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



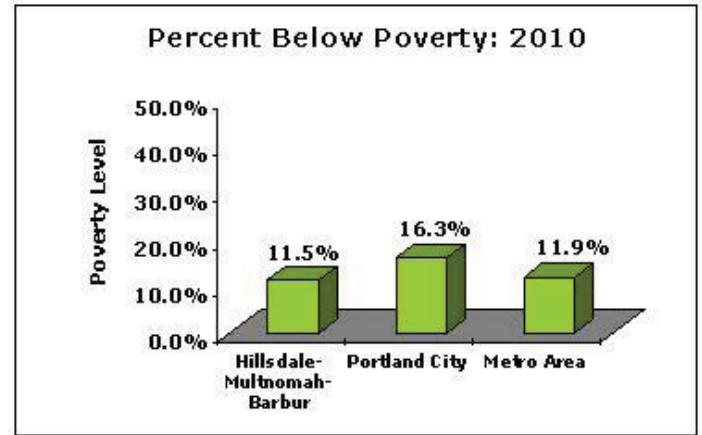
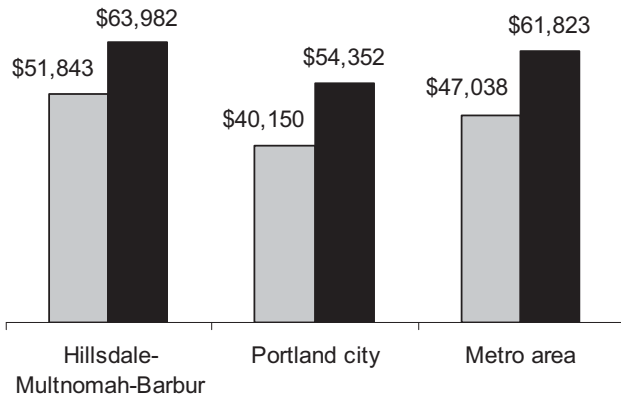
Population Pyramid for Hillsdale-Multnomah-Barbur, 2010



Racial and Ethnic Distribution in Portland vs. Hillsdale-Multnomah-Barbur

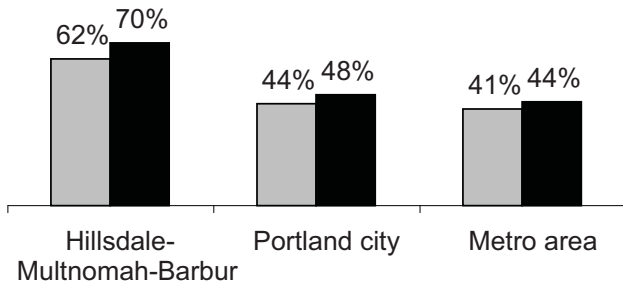


### Median Household Income

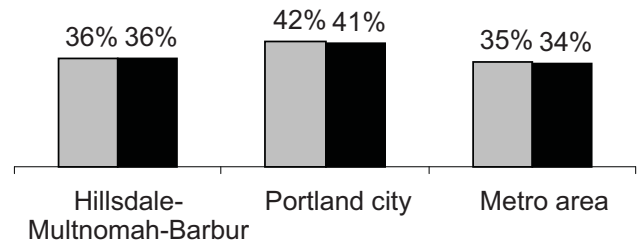


ACS 2006-2010

### Percent College Graduates



### Percent Renters of Occupied Housing Units



### Median Home Value

|          | Hillsdale-Multnomah-Barbur | Portland city | Metro area |
|----------|----------------------------|---------------|------------|
| 2010     | \$342,618                  | \$253,184     | \$273,500  |
| 2000     | \$202,698                  | \$154,721     | \$168,347  |
| % change | 69.0%                      | 63.6%         | 62.5%      |

# Hillsdale-Multnomah-Barbur Analysis Area

## Commercial Real Estate Indicators

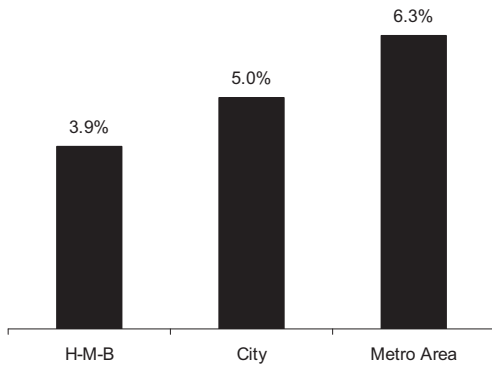
Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

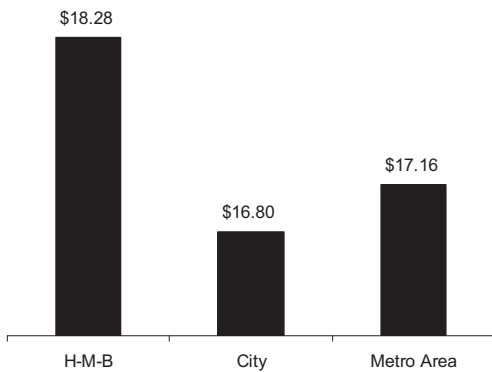
#### Square Feet

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

#### Retail Vacancy



#### Retail Rents

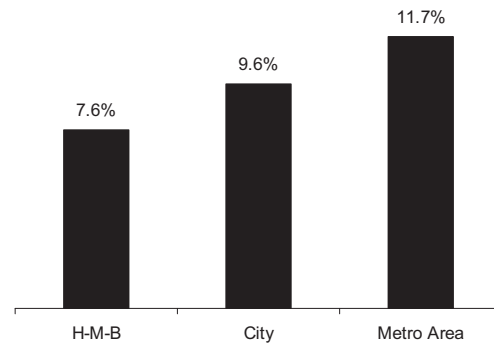


### OFFICE SPACE

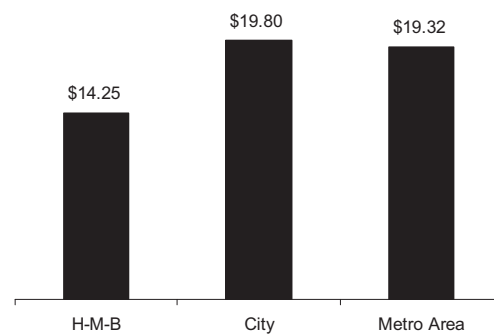
#### Square Feet

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

#### Office Vacancy



#### Office Rents





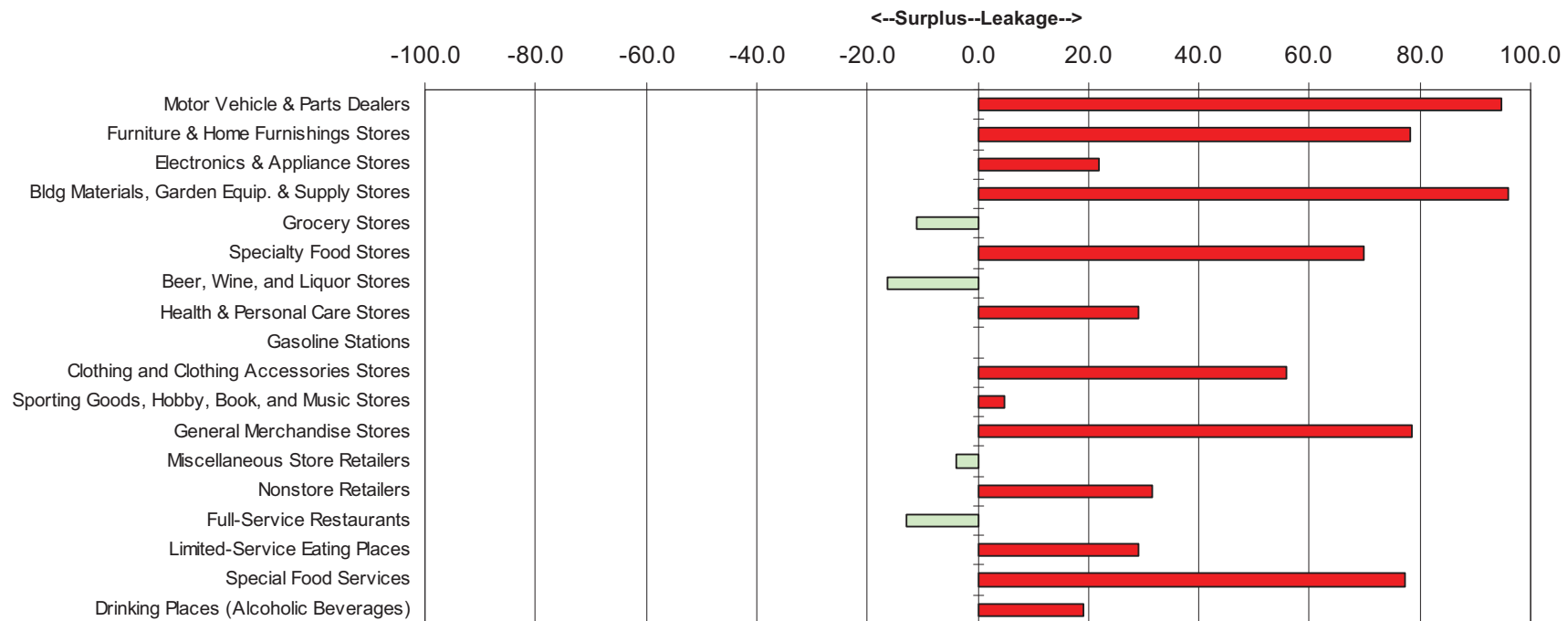
# Hillsdale-Multnomah-Barbur Analysis Area

## Retail Market Profile

**Retail Gap = \$128 million**

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

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)



# Hillsdale-Multnomah-Barbur Analysis Area

## Employment

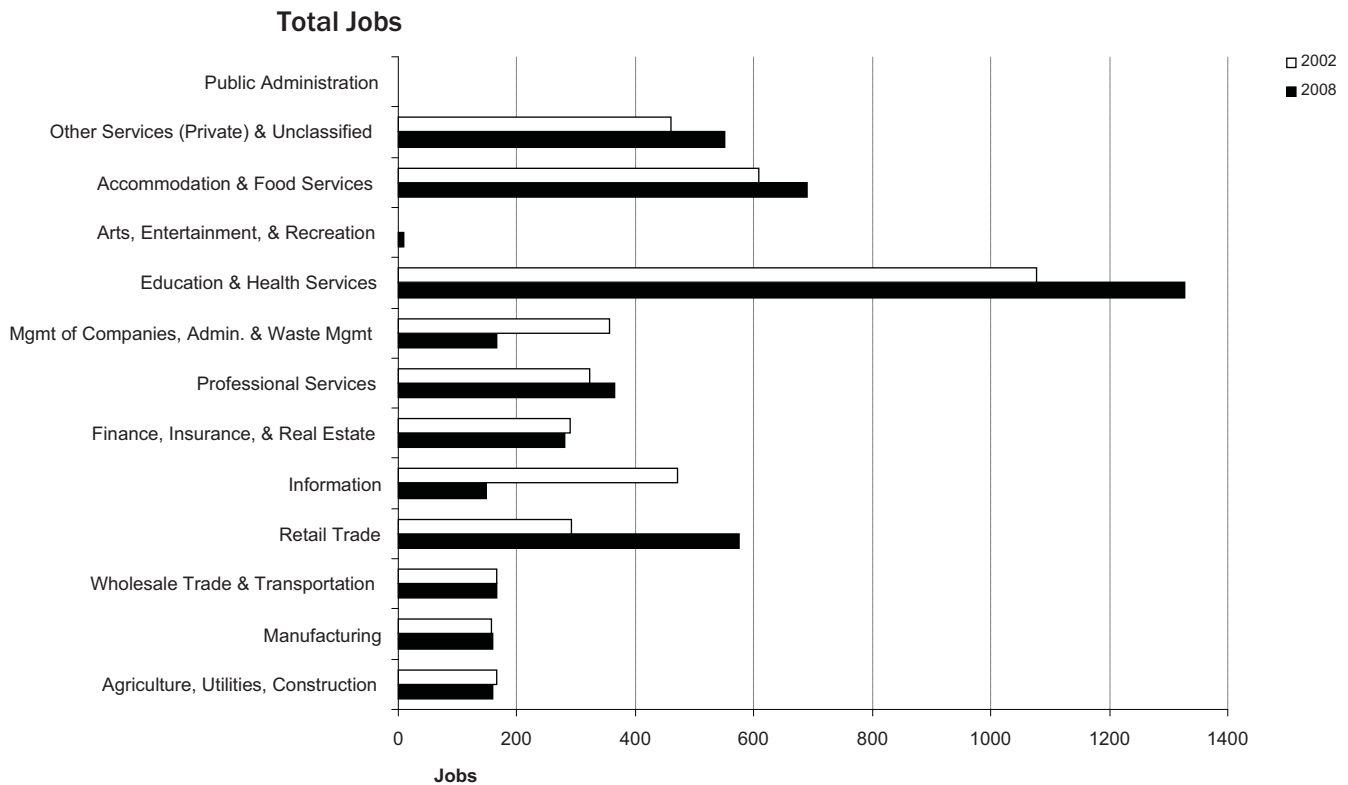
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

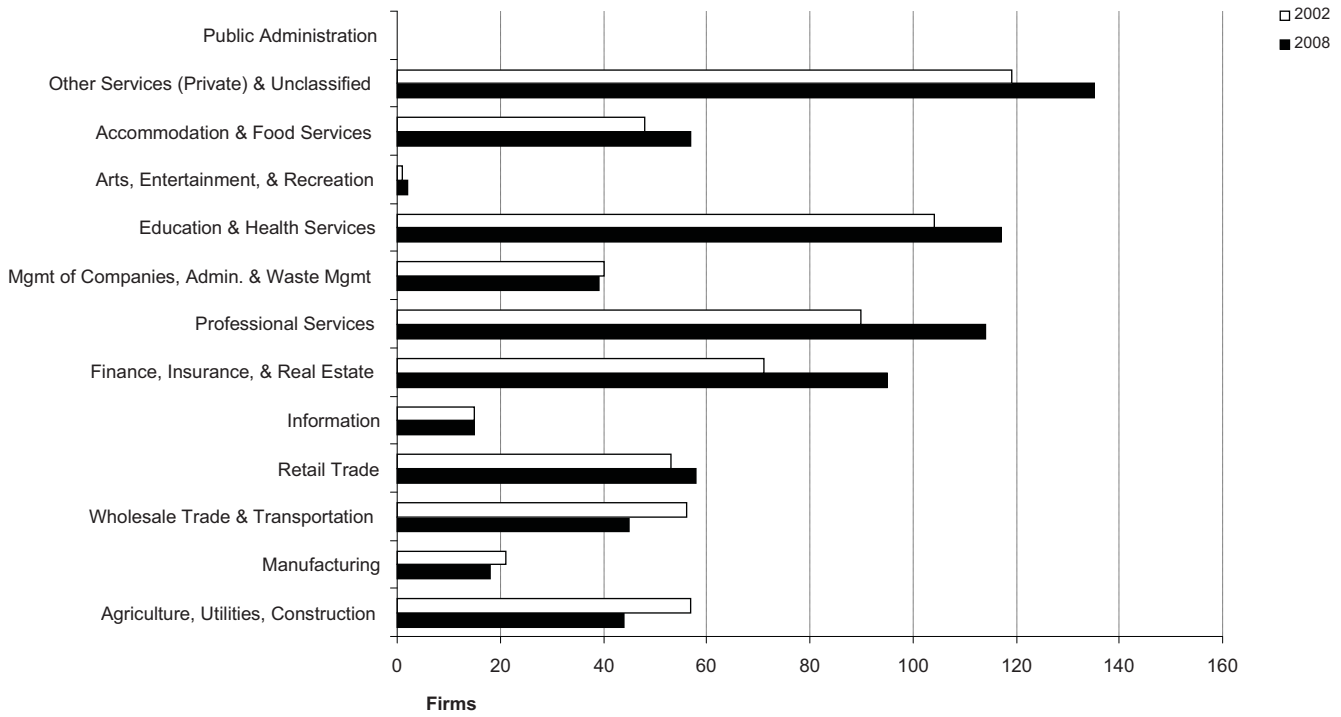
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

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

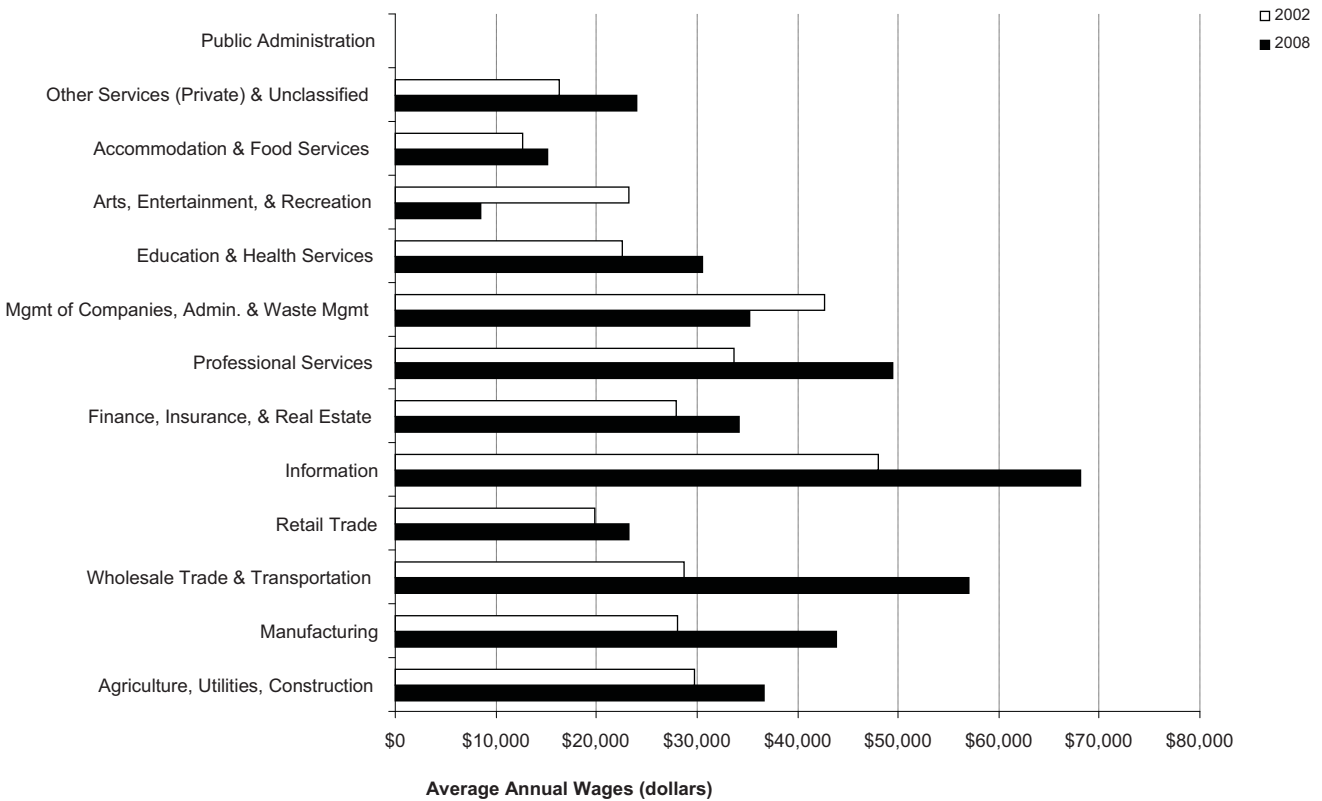
|                      | 2002     | 2008     | change |
|----------------------|----------|----------|--------|
| Total Jobs           | 4,364    | 4,597    | +233   |
| Total Firms          | 675      | 739      | +64    |
| Average Annual Wages | \$26,057 | \$31,254 | +5,197 |



### Total Firms



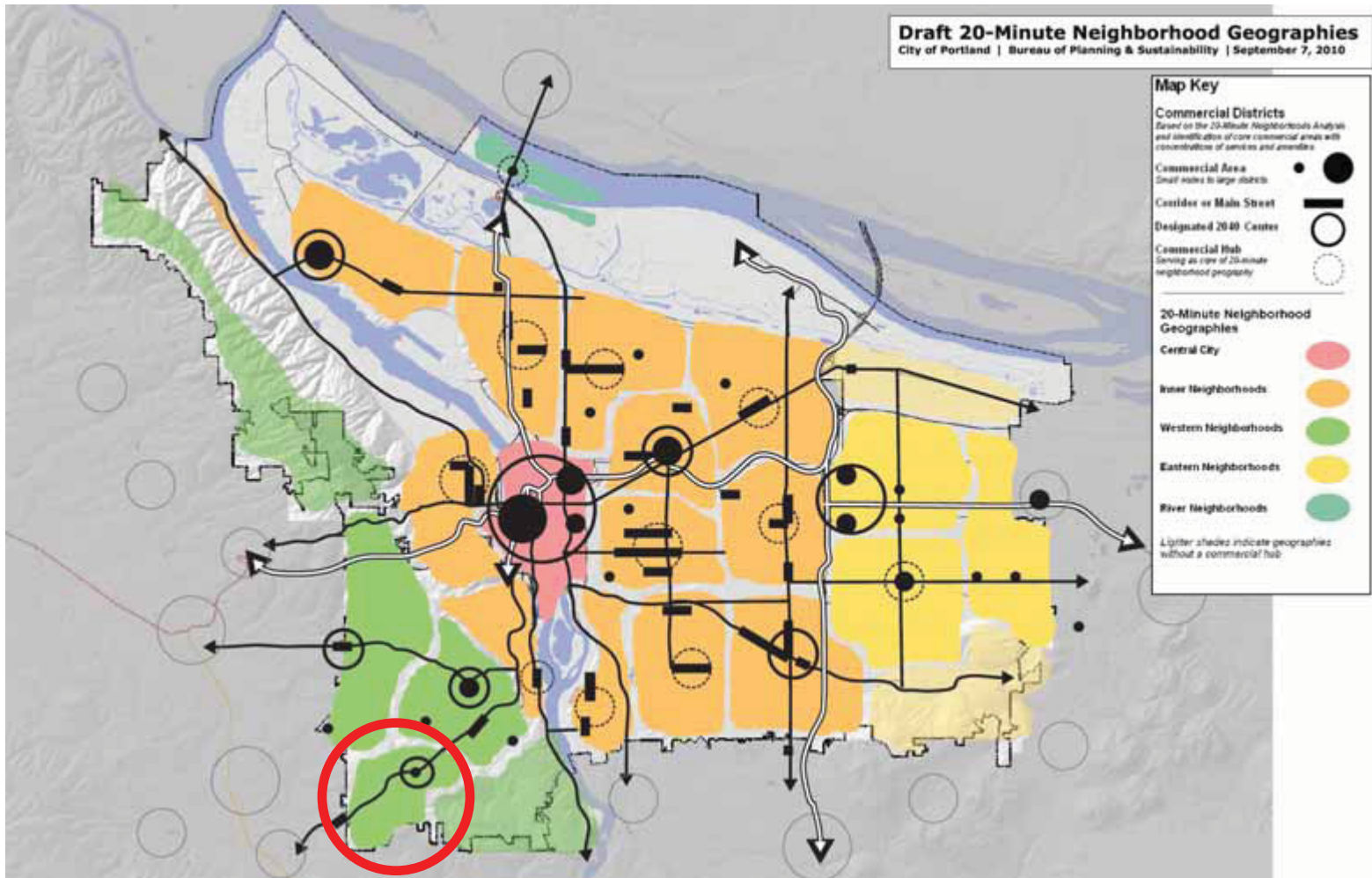
### Average Annual Wages



## West Portland Analysis Area

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

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

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.*

# West Portland Analysis Area

## Services and Amenities

Population: 10,800 people (4,600 households)  
Land Area: 2.6 sq. miles (4,200 people per sq. mile)

### Commercial Districts

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

**Grocery stores:** 1 (1 store per 4,600 households)

**Retail gap:** \$106 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*:                         | 83% |
| Within 1/2 mile of a public elementary school:      | 19% |
| Within 3 miles of a full-service community center*: | 94% |
| Within 1/2 mile of a full-service grocery store:    | 13% |
| Within 1/4 mile of a frequent service transit stop: | 15% |

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** 1 (Capitol Hill Library)

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

**Tree Canopy Coverage:** 42%

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

**Colleges (campus):** Portland Community College - Sylvania

**Hospitals:** None

**Farmers Markets:** None

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

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

### Neighborhood and Business Associations

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

**Business Associations:** None

## Urban Form Characteristics

Natural features are prominent characteristics of this area, including gently-rolling hills, forested slopes, and occasional streams and ravines. The area is composed primarily of residential neighborhoods, which include a mix of gridded streets (sometimes interrupted by natural features) and some curvilinear streets that follow the area’s topography. Most streets do not have sidewalks. The area’s primary commercial corridor is Barbur Boulevard, predominated by auto-oriented development with surface parking lots.

**Access issues.** Most of the area lacks good street connectivity and most streets do not have sidewalks. Commercial and community services are beyond walking distance for most residents. The area has relatively low population densities and most residents do not have walkable access to frequent service transit. Topography and other natural features also limit pedestrian and bicycle accessibility in some parts of this area, and the I-5 Freeway and Barbur Boulevard serve as barriers.

## 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.*

West Portland Town Center: 281 acres  
 Main Streets: 0  
 Station Communities: 0

## Zoning

|                            | Acres | % of Land Area | Buildable Acres* |
|----------------------------|-------|----------------|------------------|
| Single-Family Residential: | 886   | 73%            | 130              |
| Multi-Family Residential:  | 192   | 16%            | 144              |
| Commercial/Mixed-Use:      | 71    | 6%             | 44               |
| Employment:                | 0     | 0%             | 0                |
| Industrial:                | 0     | 0%             | 0                |
| Open Space:                | 71    | 6%             | NA               |

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

## Anticipated Growth by 2035

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

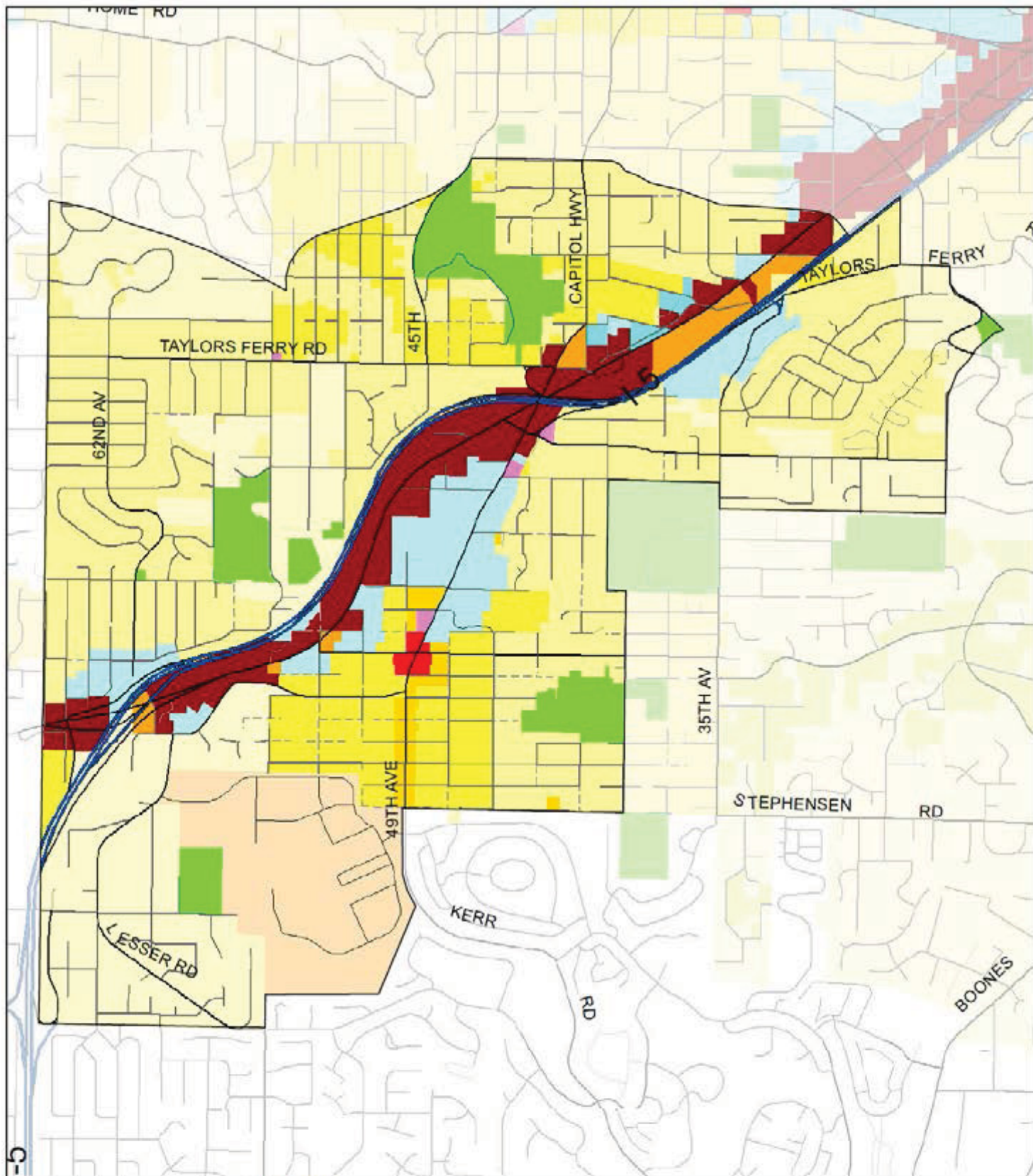
2010 Housing Units (Census): 4,826  
 2035 Housing Units: 6,300

### 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                         |

# West Portland 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 |    |

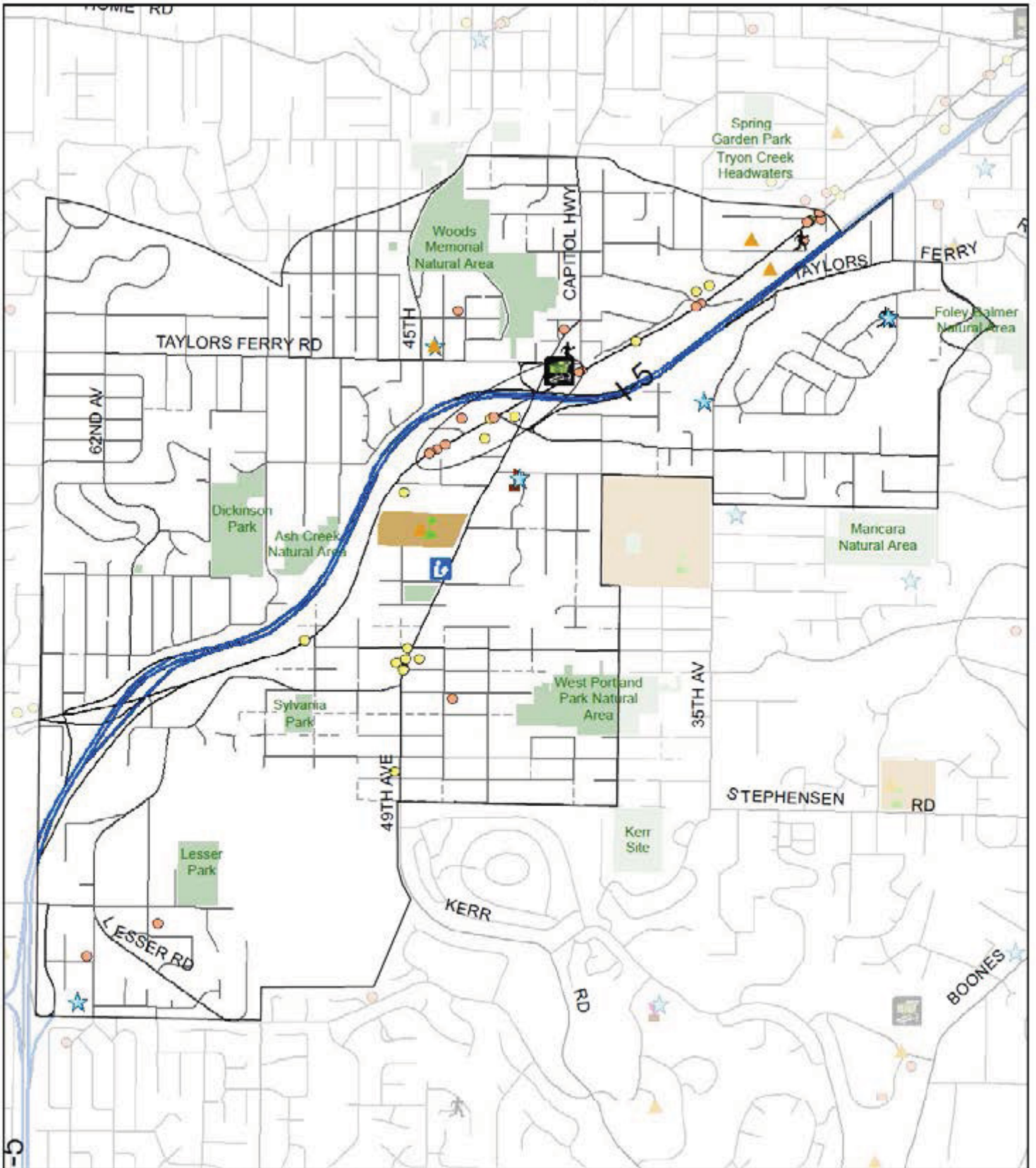


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# West Portland Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- grocery Grocery Stores
- ★ Places of Worship
- ★ County Aging Services
- 📖 Libraries
- 🏡 Farmers Markets
- 🌿 Community Gardens
- 🏢 Community Centers
- 🏥 County Health Clinic
- 👶 Preschools
- 🏠 Daycare Centers
- 🎓 Public HS
- 🎓 Public K-8
- 🎓 Private Schools



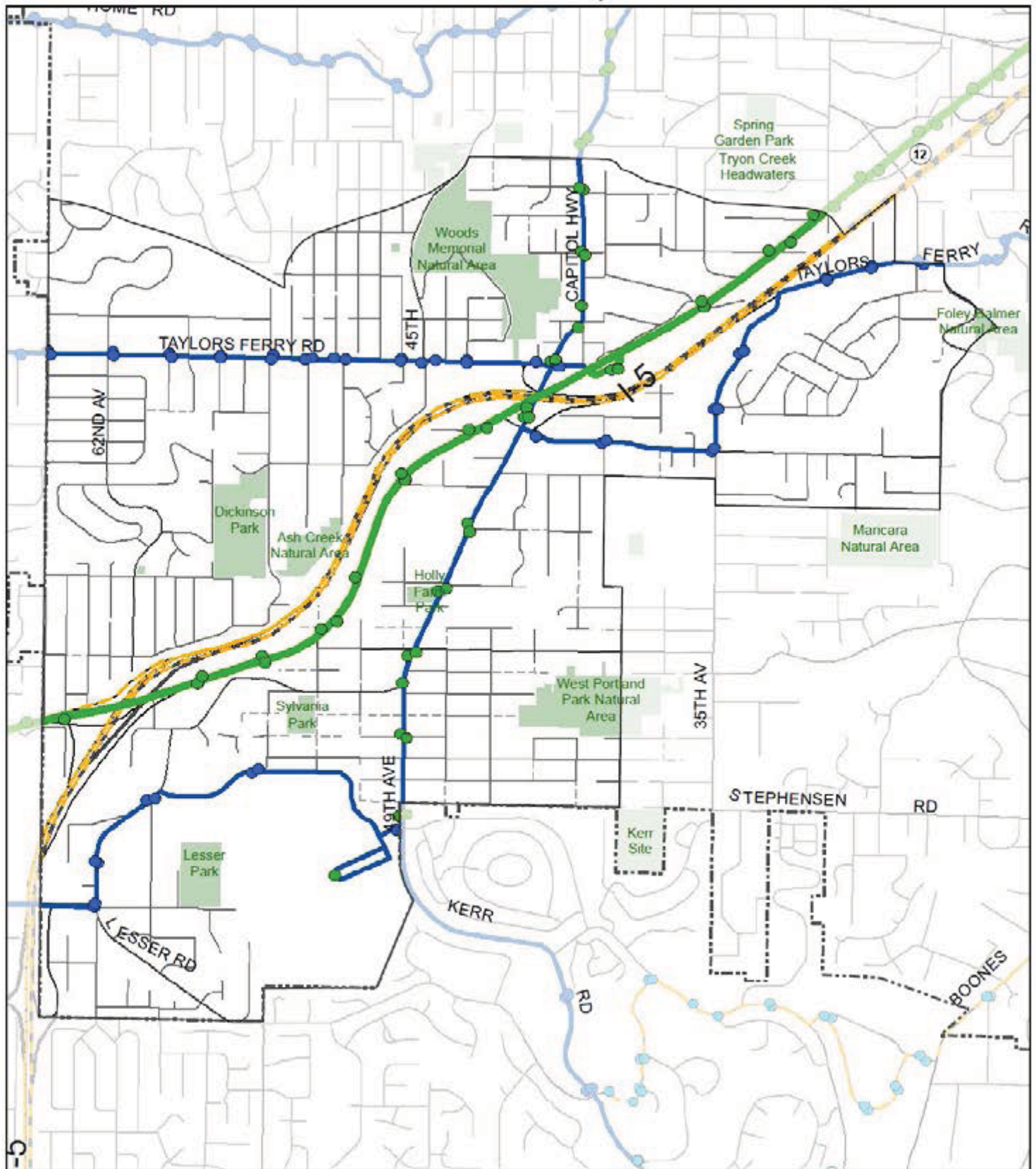
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# West Portland Analysis Area



## Transit Infrastructure

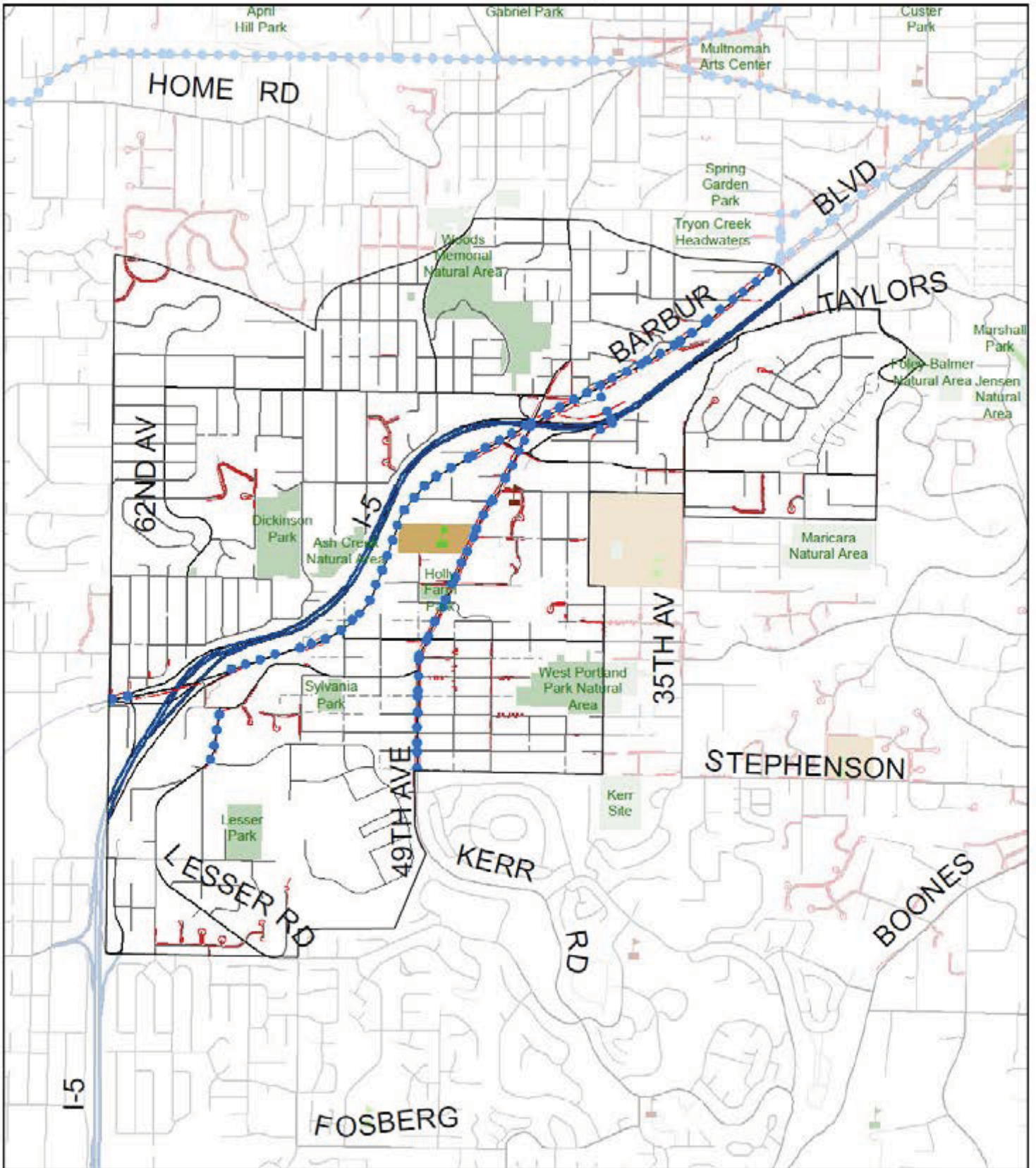
- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary



August 9, 2011

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# West Portland 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



0 1,000 2,000 3,000 Feet

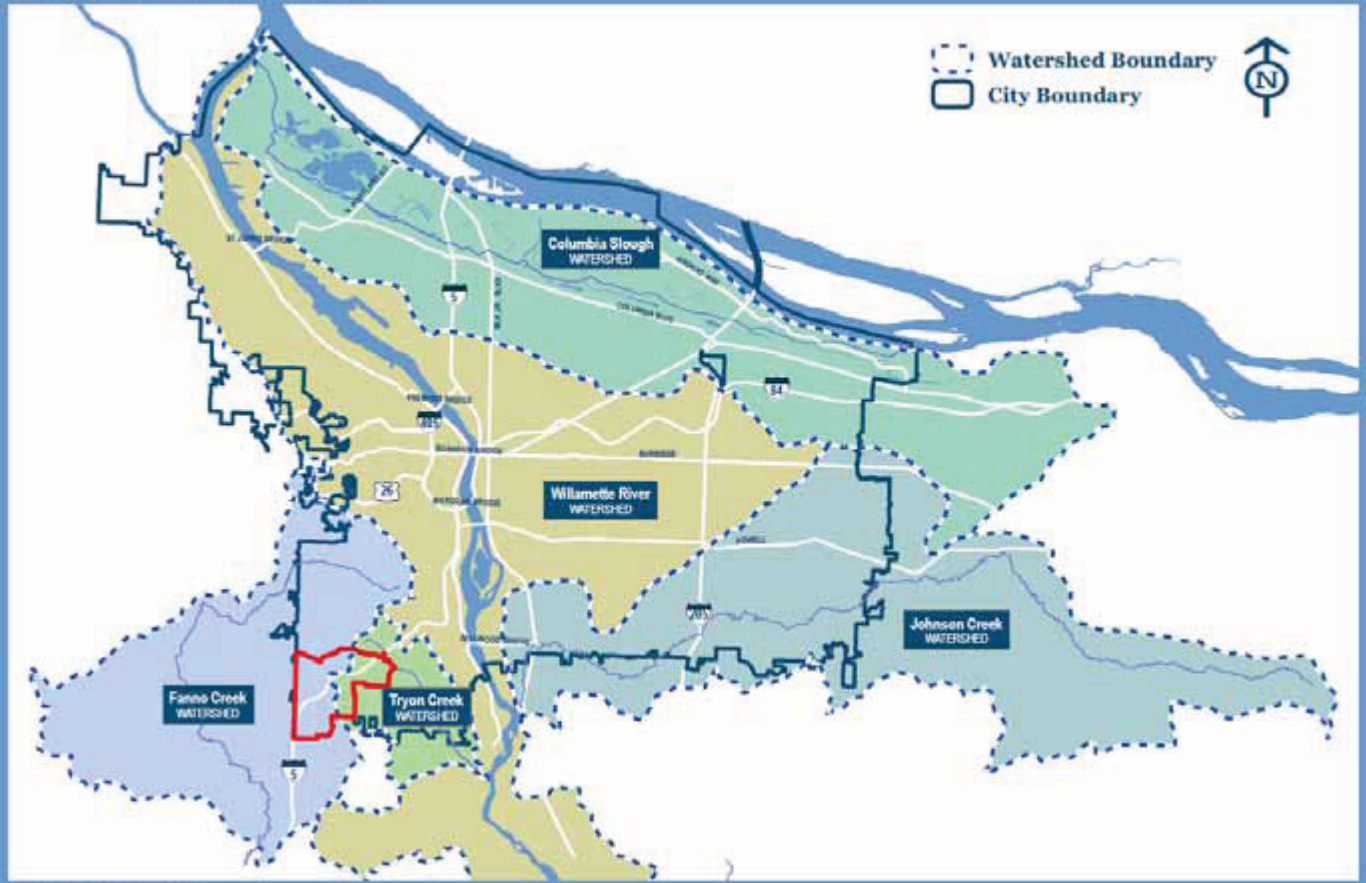


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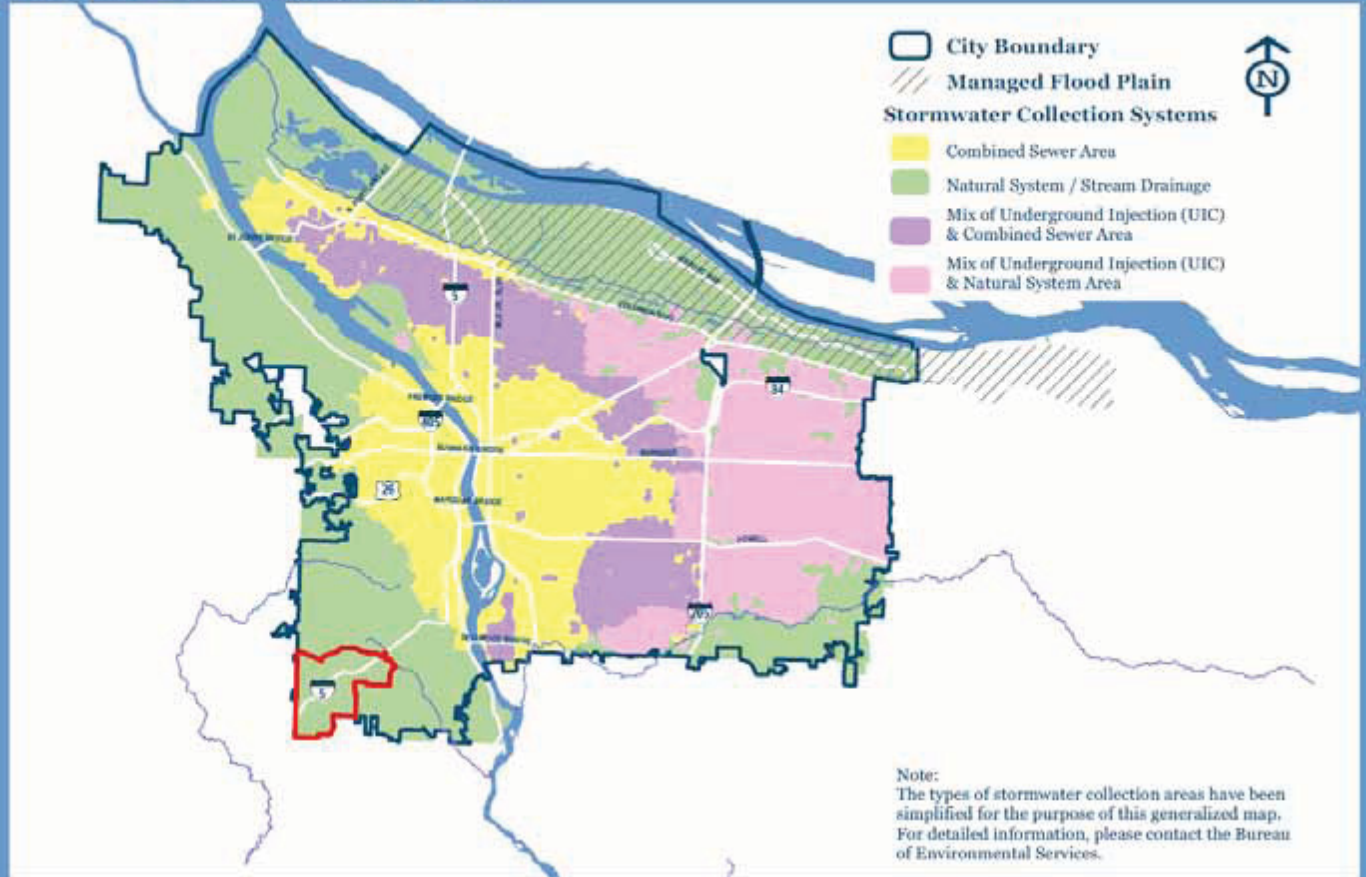


City of Portland, Oregon  
Sara Adams, Mayor | Jean Anderson, Director

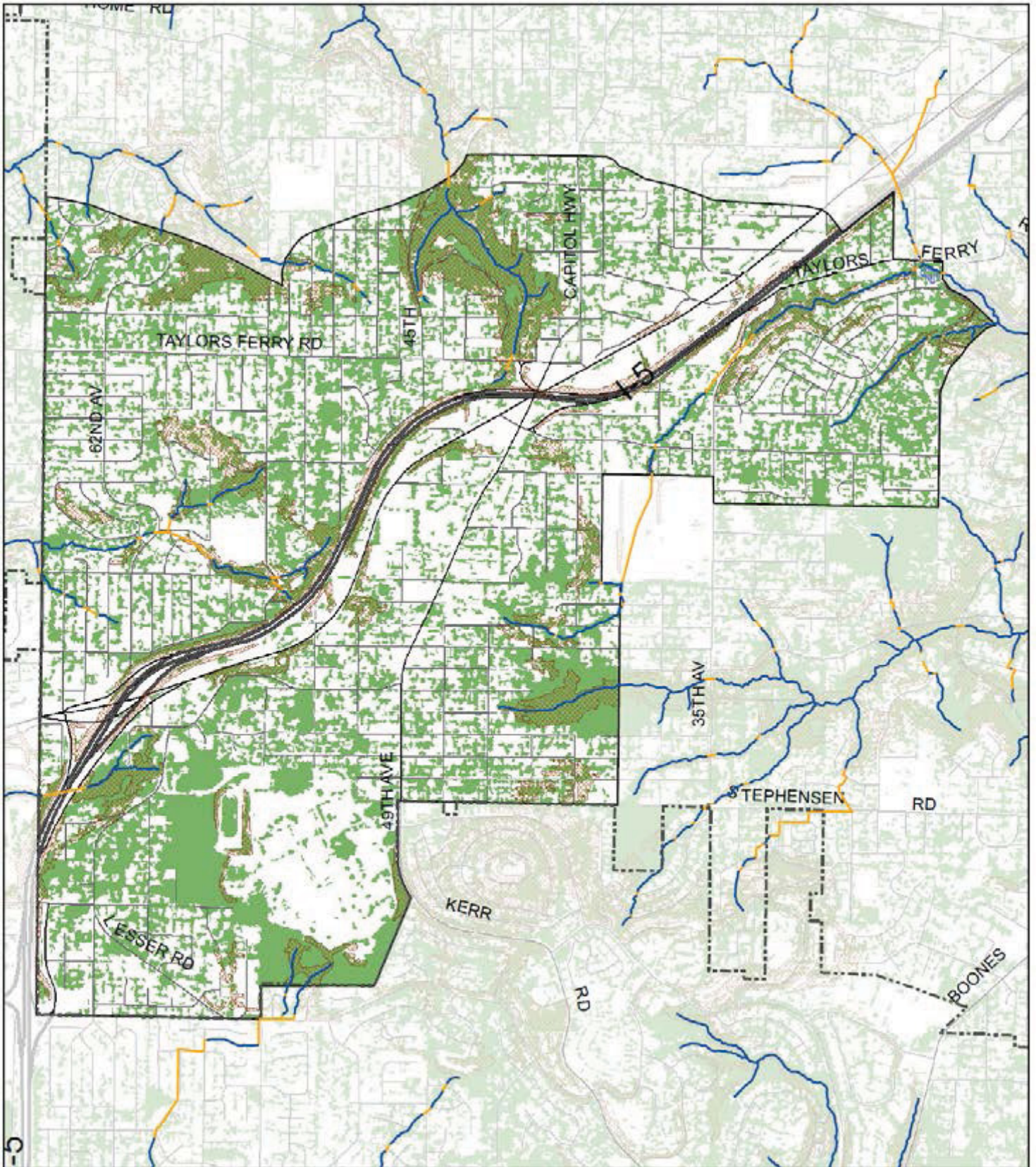
## Portland Watersheds









## Portland Stormwater System



# West Portland Analysis Area



## Watersheds and Natural Features

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



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Sue Adams, Mayor • Susan Anderson, Director

August 9, 2011

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# West Portland Analysis Area Demographics (2000 – 2010)

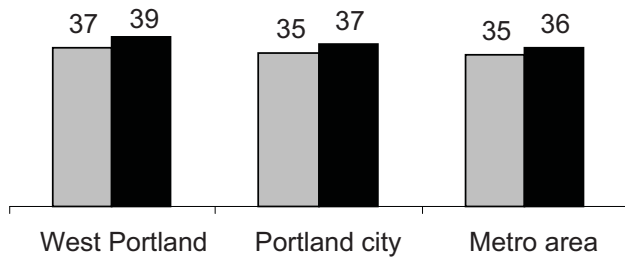
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

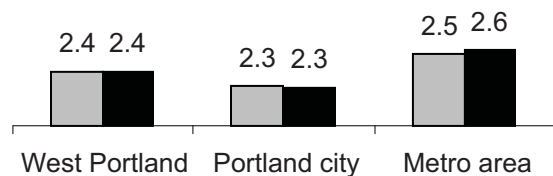
|          | West Portland | Portland city | Metro area |
|----------|---------------|---------------|------------|
| 2010     | 10,836        | 583,776       | 2,226,009  |
| 2000     | 10,481        | 529,121       | 1,927,881  |
| % change | 3%            | 10%           | 15%        |

█ 2000 █ 2010

## Median Age

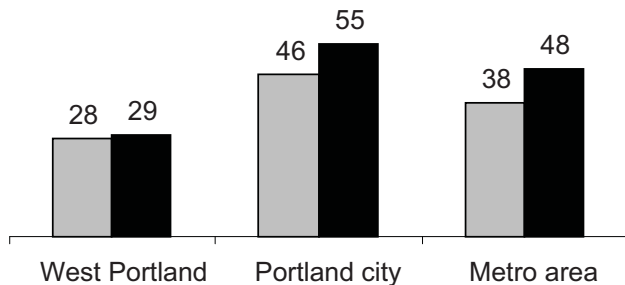


## Average Household Size

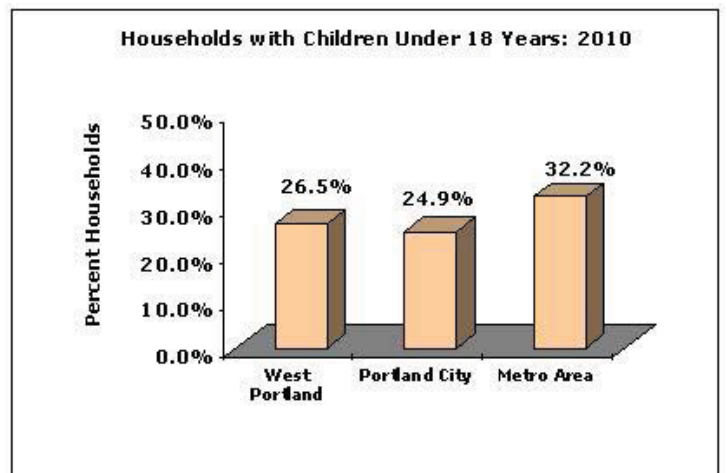
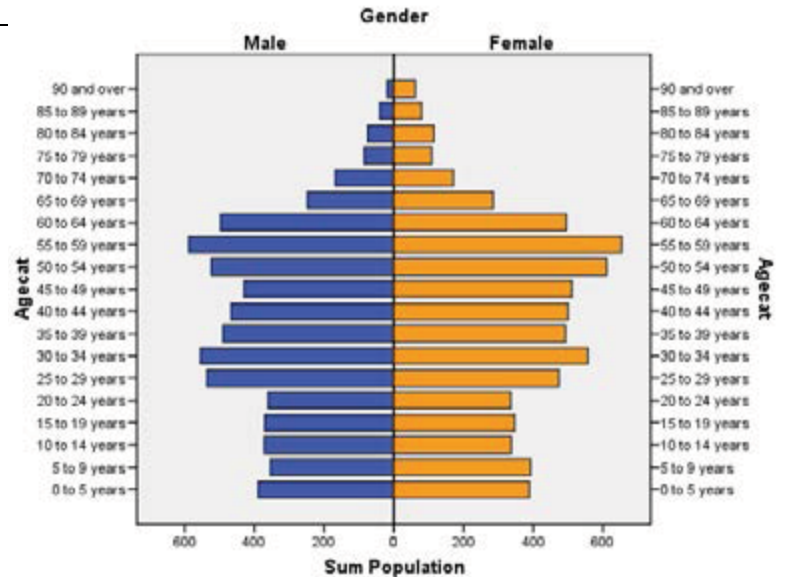


## Diversity Index

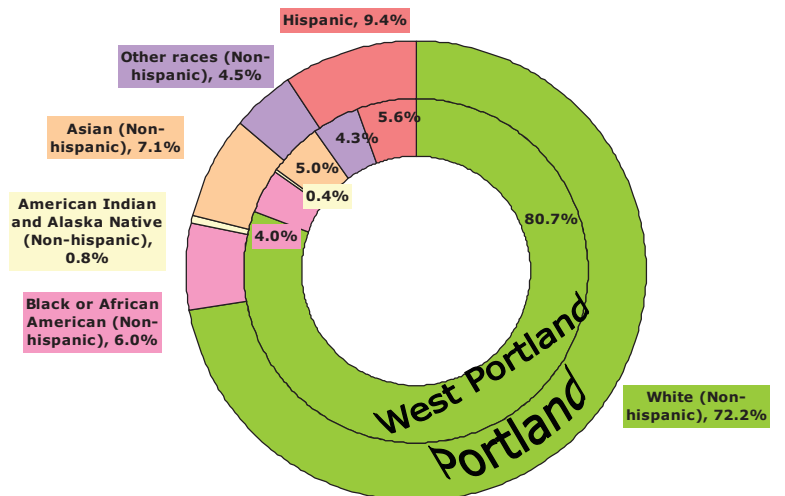
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



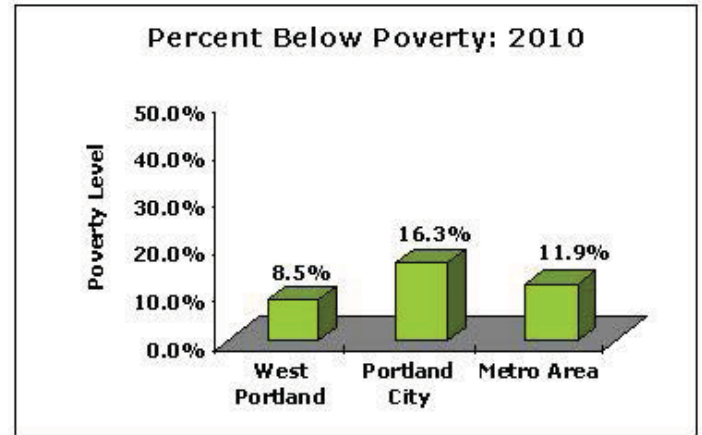
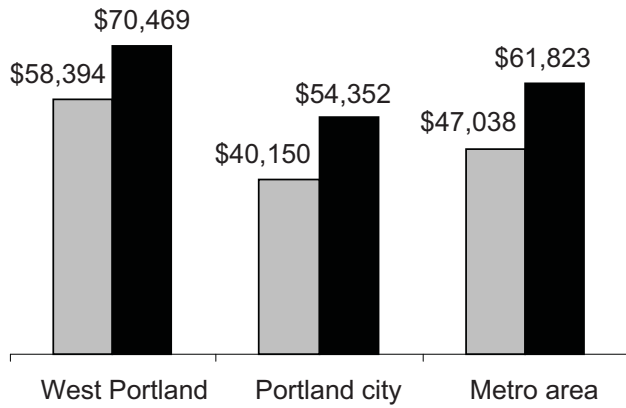
Population Pyramid for West Portland, 2010



Racial and Ethnic Distribution in Portland vs. West Portland

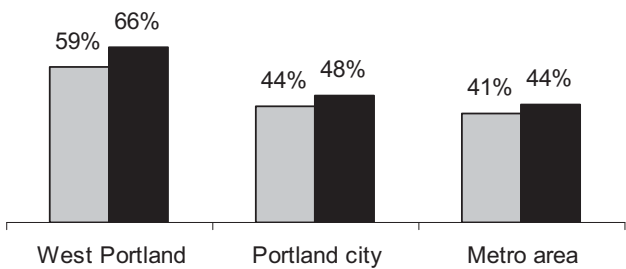


### Median Household Income

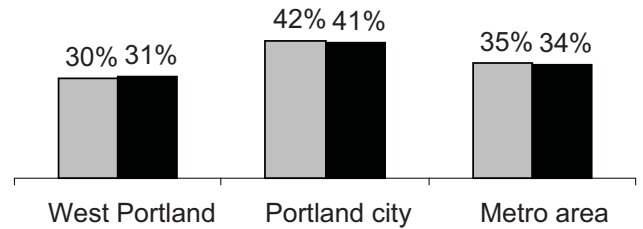


ACS 2006-2010

### Percent College Graduates



### Percent Renters of Occupied Housing Units



### Median Home Value

|          | West Portland | Portland city | Metro area |
|----------|---------------|---------------|------------|
| 2010     | \$319,207     | \$253,184     | \$273,500  |
| 2000     | \$186,698     | \$154,721     | \$168,347  |
| % change | 71.0%         | 63.6%         | 62.5%      |

# West Portland Analysis Area

## Commercial Real Estate Indicators

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

### RETAIL

#### Square Feet

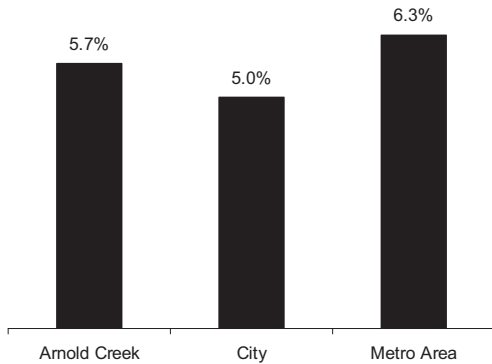
| West Portland | City       | Metro Area  |
|---------------|------------|-------------|
| 139,578       | 51,937,895 | 107,875,146 |

### OFFICE SPACE

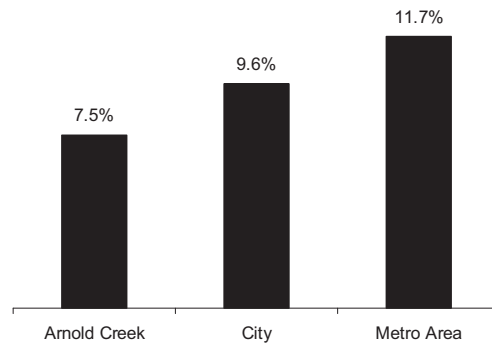
#### Square Feet

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

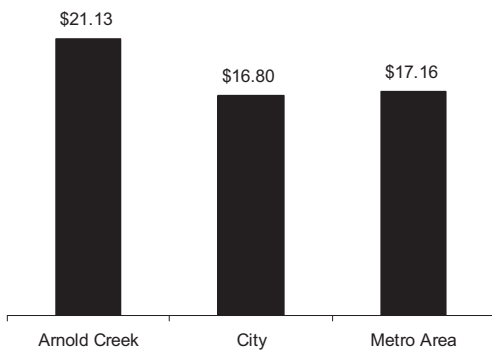
#### Retail Vacancy



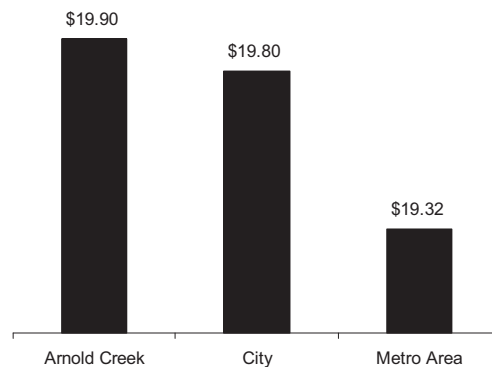
#### Office Vacancy



#### Retail Rents



#### Office Rents



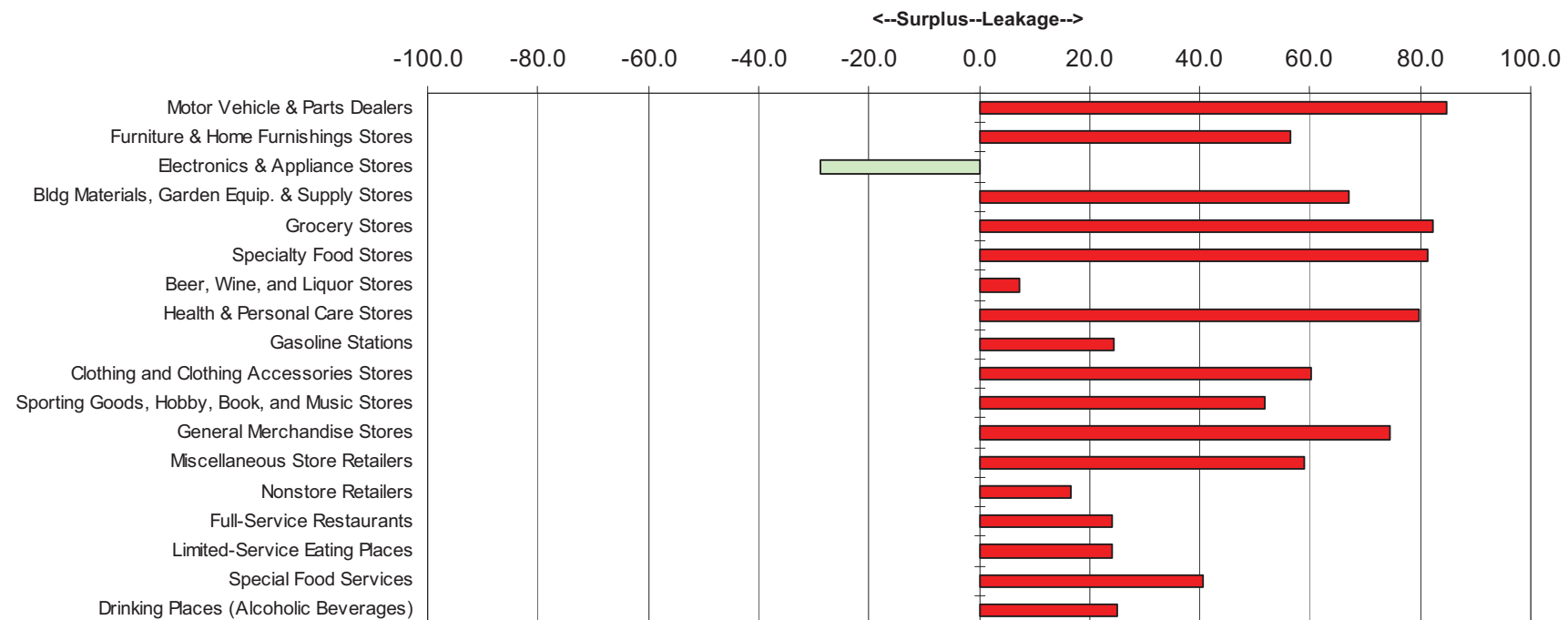
# West Portland Analysis Area

## Retail Market Profile

**Retail Gap = \$106 million**

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

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)





# West Portland Analysis Area

## Employment

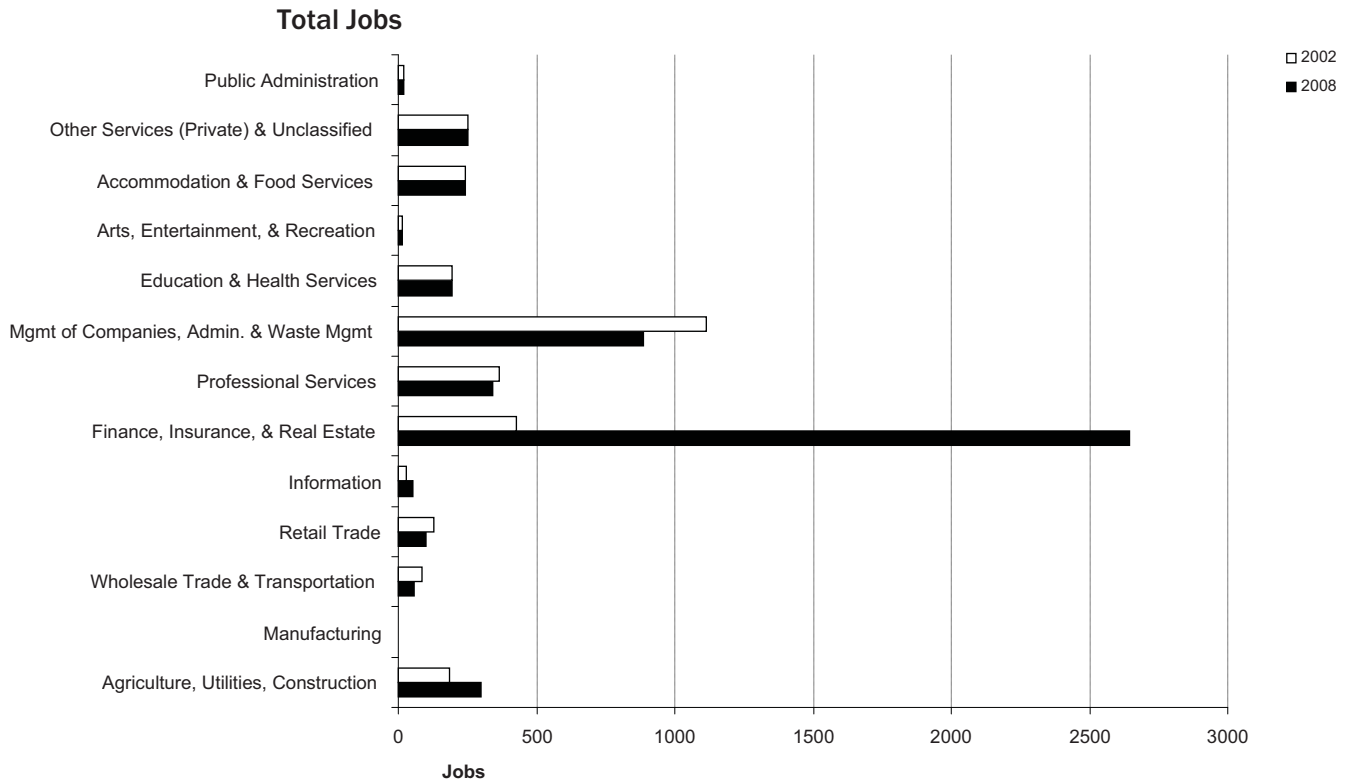
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

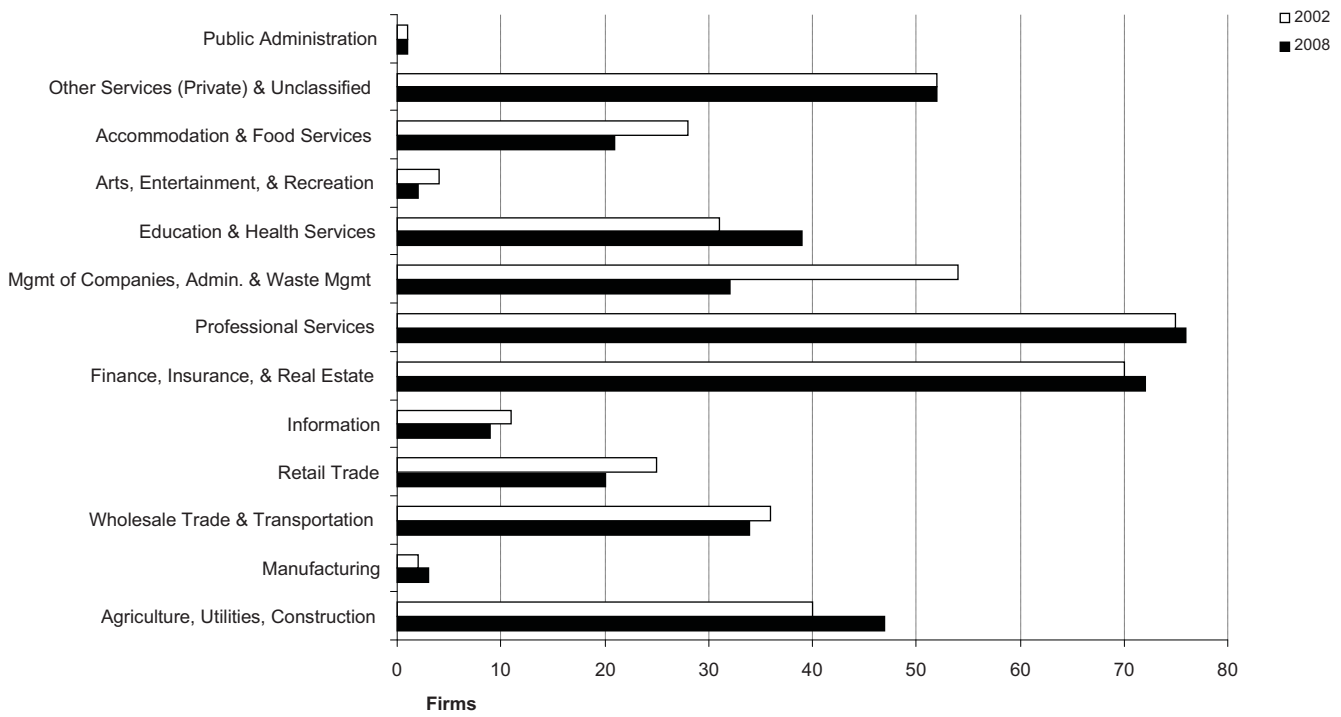
This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

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

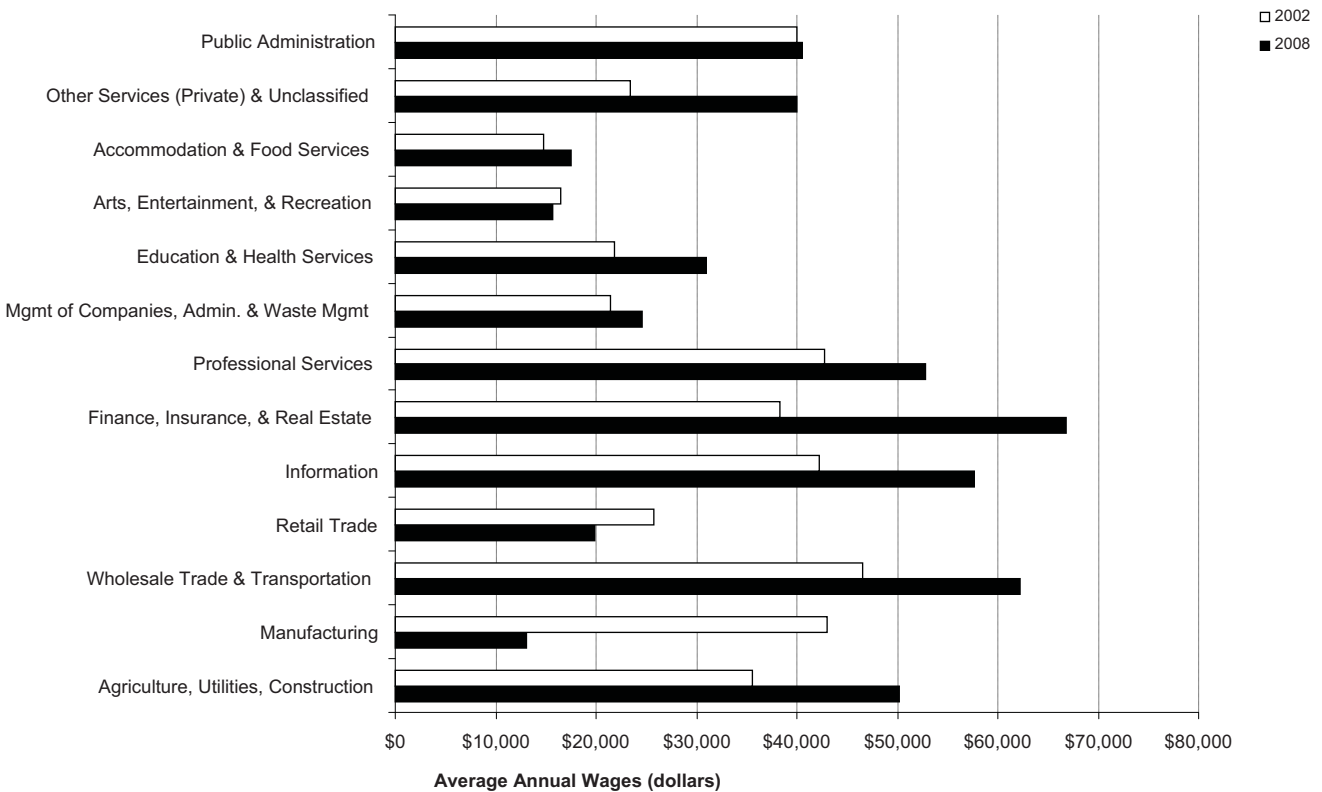
|                      | 2002     | 2008     | change  |
|----------------------|----------|----------|---------|
| Total Jobs           | 3,061    | 5,104    | +2,043  |
| Total Firms          | 429      | 408      | - 21    |
| Average Annual Wages | \$28,038 | \$45,600 | +17,562 |



### Total Firms



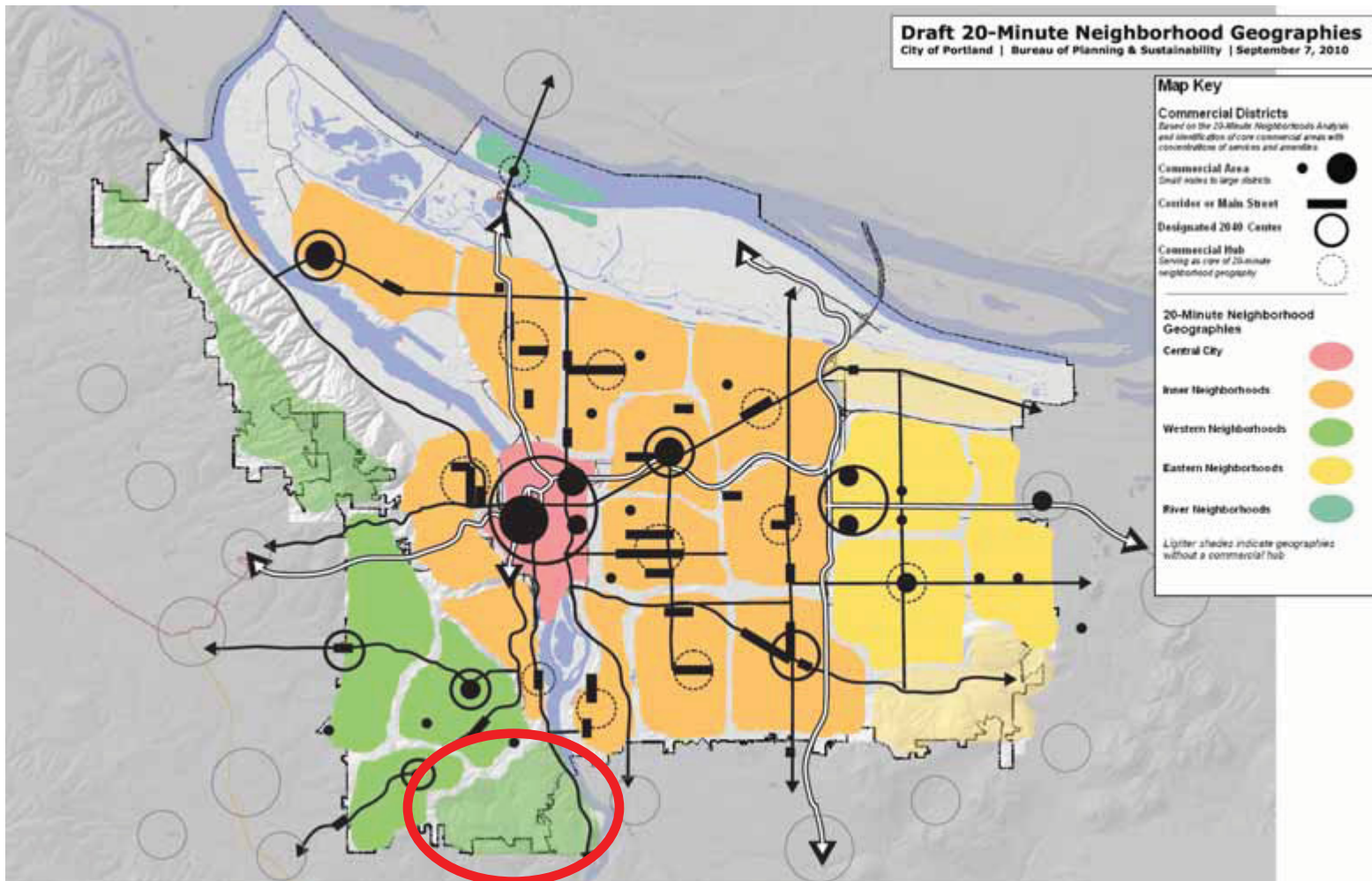
### Average Annual Wages



## Tryon Creek-Riverdale Analysis Area

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

### Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

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.*

# Tryon Creek-Riverdale Analysis Area

## Services and Amenities

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

### Commercial Districts

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

**Grocery stores:** None

**Retail gap:** \$140 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*:                         | 19% |
| Within 1/2 mile of a public elementary school:      | 7%  |
| Within 3 miles of a full-service community center*: | 26% |
| Within 1/2 mile of a full-service grocery store:    | 4%  |
| Within 1/4 mile of a frequent service transit stop: | 0%  |

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** None

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

**Tree Canopy Coverage:** 67%

**Public Schools:** 1 high school (Riverdale)  
2 K-8 schools (Riverdale Grade School, Stephenson Elementary\*)  
\*At edge of analysis area

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

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None

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

### Neighborhood and Business Associations

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

**Business Associations:** None

## Urban Form Characteristics

Natural areas and features are the most prominent characteristics of this area, including Tryon Creek and smaller streams, ravines, and forested slopes. Tryon Creek State Park and other natural areas occupy large portions of the area. Residential areas are sometimes tucked within natural areas, with curvilinear streets often following topography. The Willamette River borders the area to the east.

**Access issues.** The area does not have an urban level of street connectivity and most streets do not have sidewalks. It does have a relatively high level of natural system connectivity and good access to trails. The area has low population densities, no commercial areas and limited transit service. Topography and other natural features also limit pedestrian and bicycle accessibility.

## 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: | 0 |

## Zoning

|                            | Acres | % of Land Area | Buildable Acres* |
|----------------------------|-------|----------------|------------------|
| Single-Family Residential: | 1,799 | 64%            | 488              |
| Multi-Family Residential:  | 143   | 5%             | 142              |
| Commercial/Mixed-Use:      | 0     | 0%             | 0                |
| Employment:                | 0     | 0%             | 0                |
| Industrial:                | 0     | 0%             | 0                |
| Open Space:                | 850   | 30%            | NA               |

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

## Anticipated Growth by 2035

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

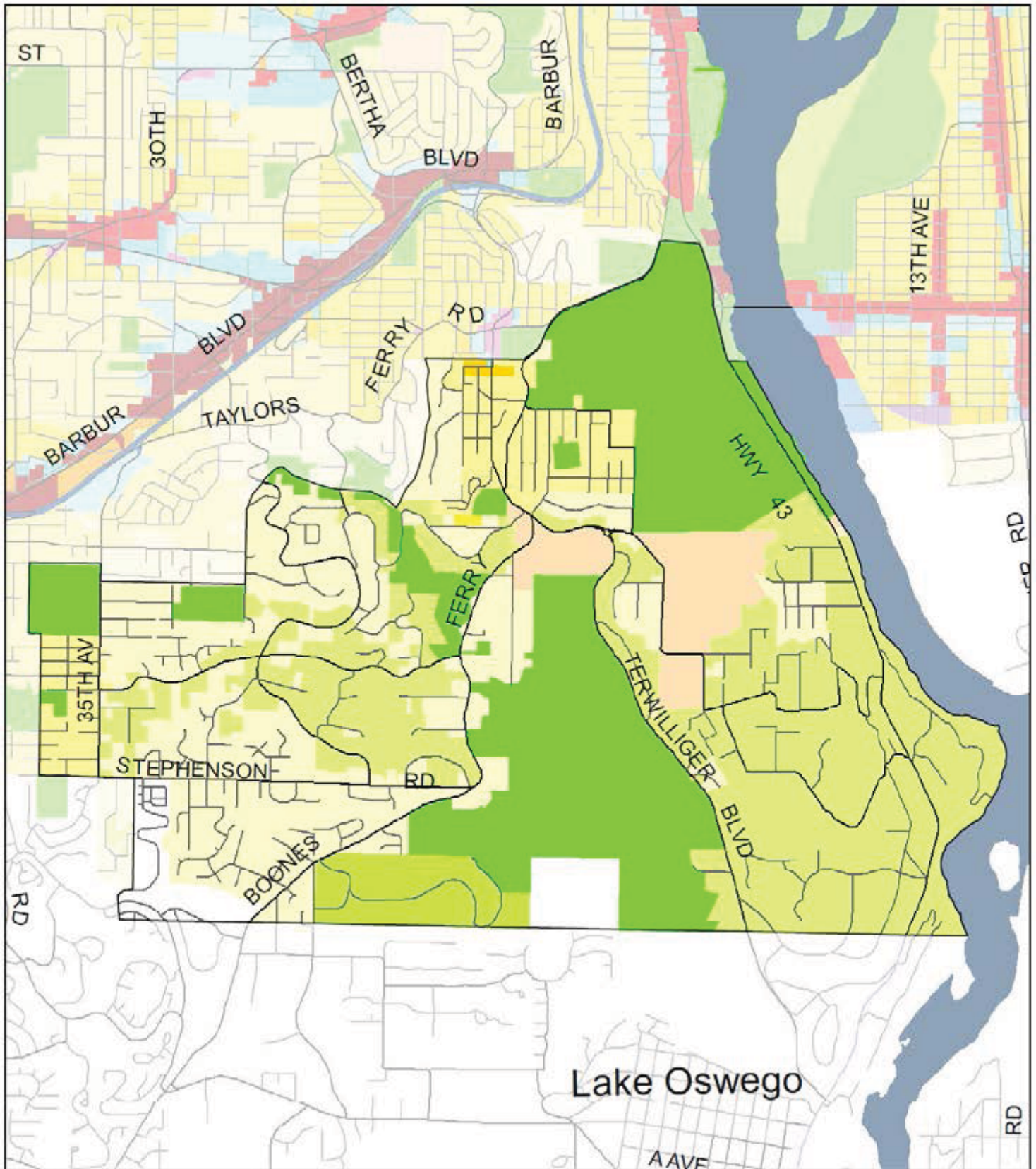
|                              |       |
|------------------------------|-------|
| 2010 Housing Units (Census): | 3,374 |
| 2035 Housing Units:          | 4,100 |

### 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                         |

# Tryon Creek-Riverdale Analysis Area



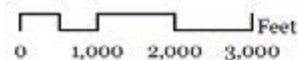
## Comprehensive Plan Designations

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 |    |



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

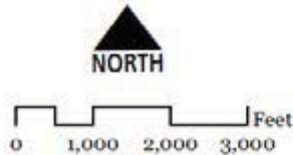
# Tryon Creek-Riverdale Analysis Area



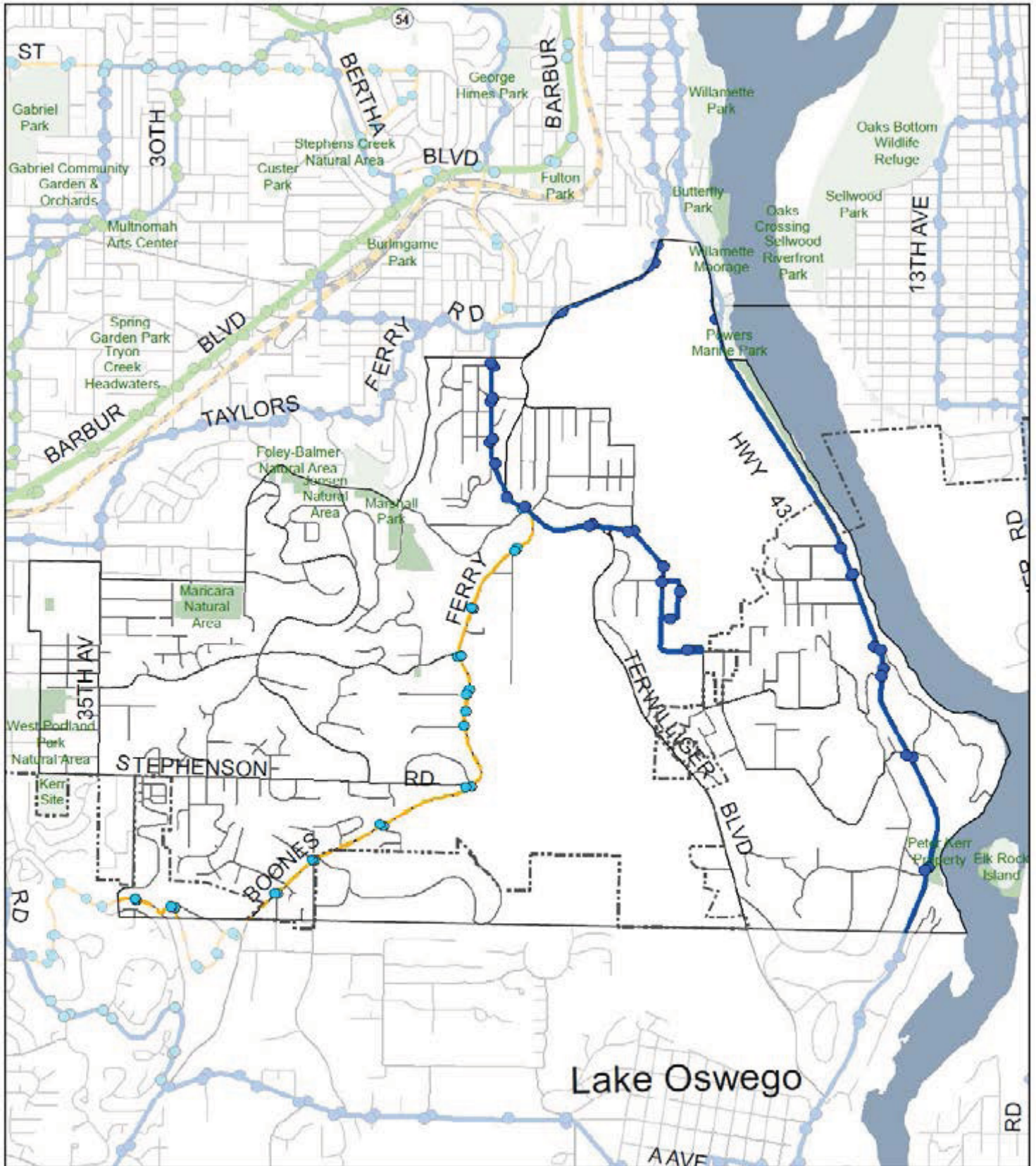
## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

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

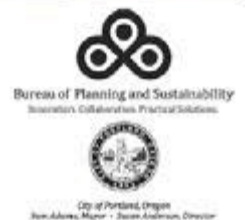
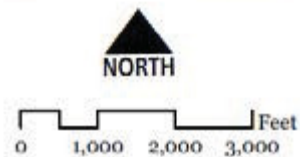


# Tryon Creek-Riverdale Analysis Area



## Transit Infrastructure

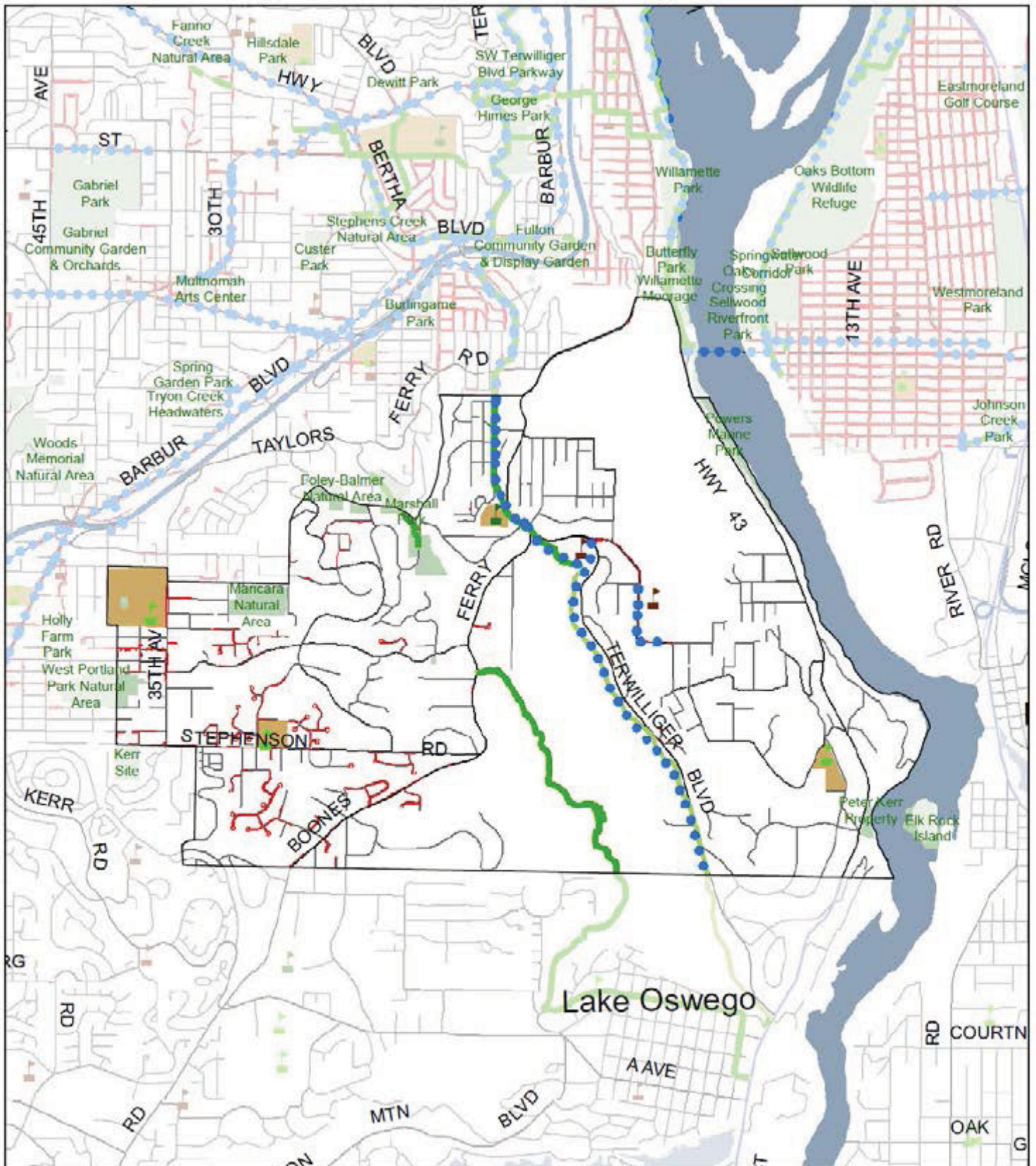
- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary



August 9, 2011  
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# Tryon Creek-Riverdale Analysis Area

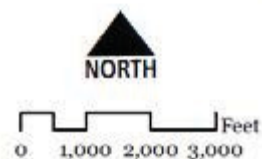


## Sidewalks and Bicycle Infrastructure

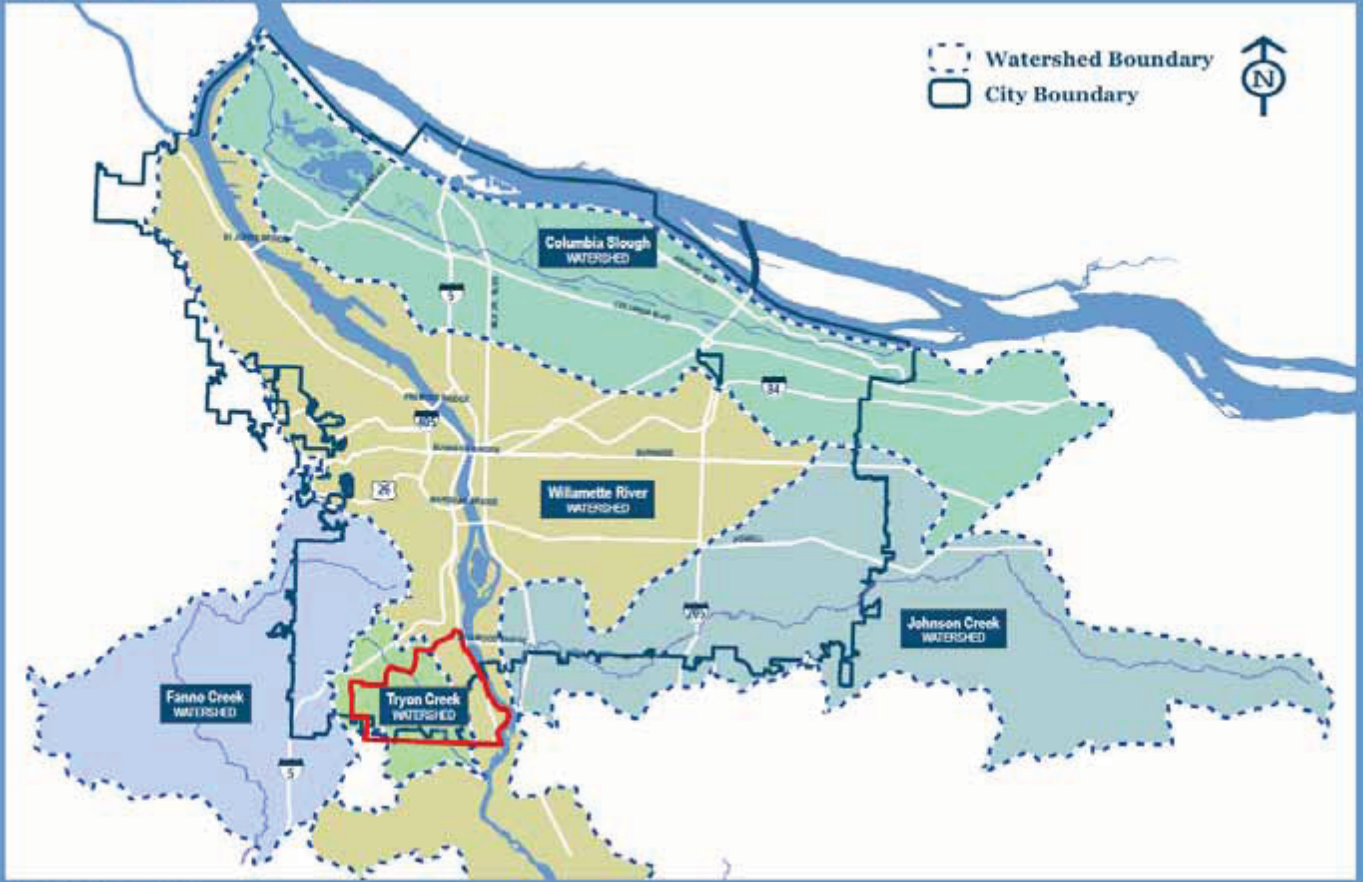
August 9, 2011

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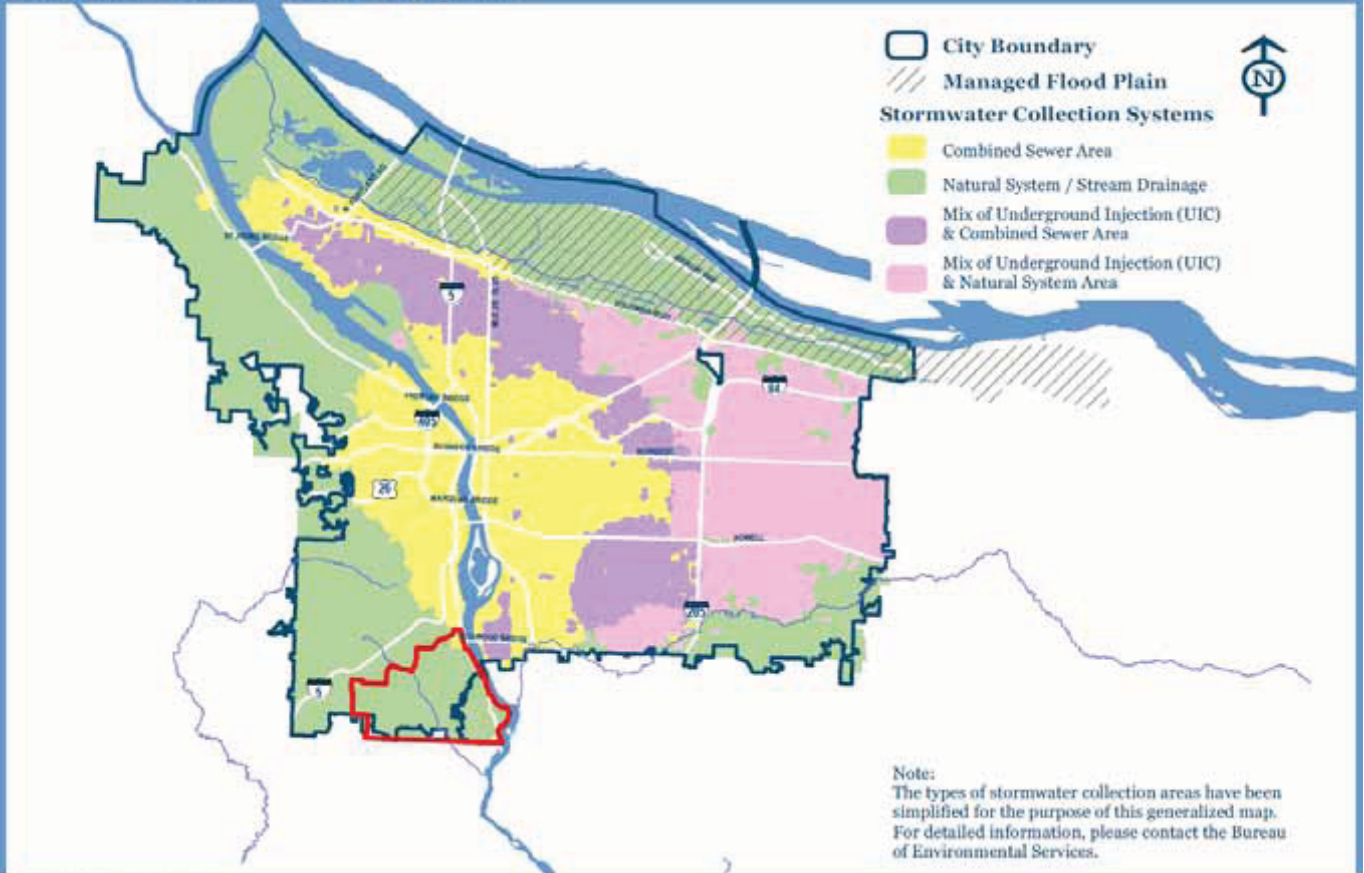
- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



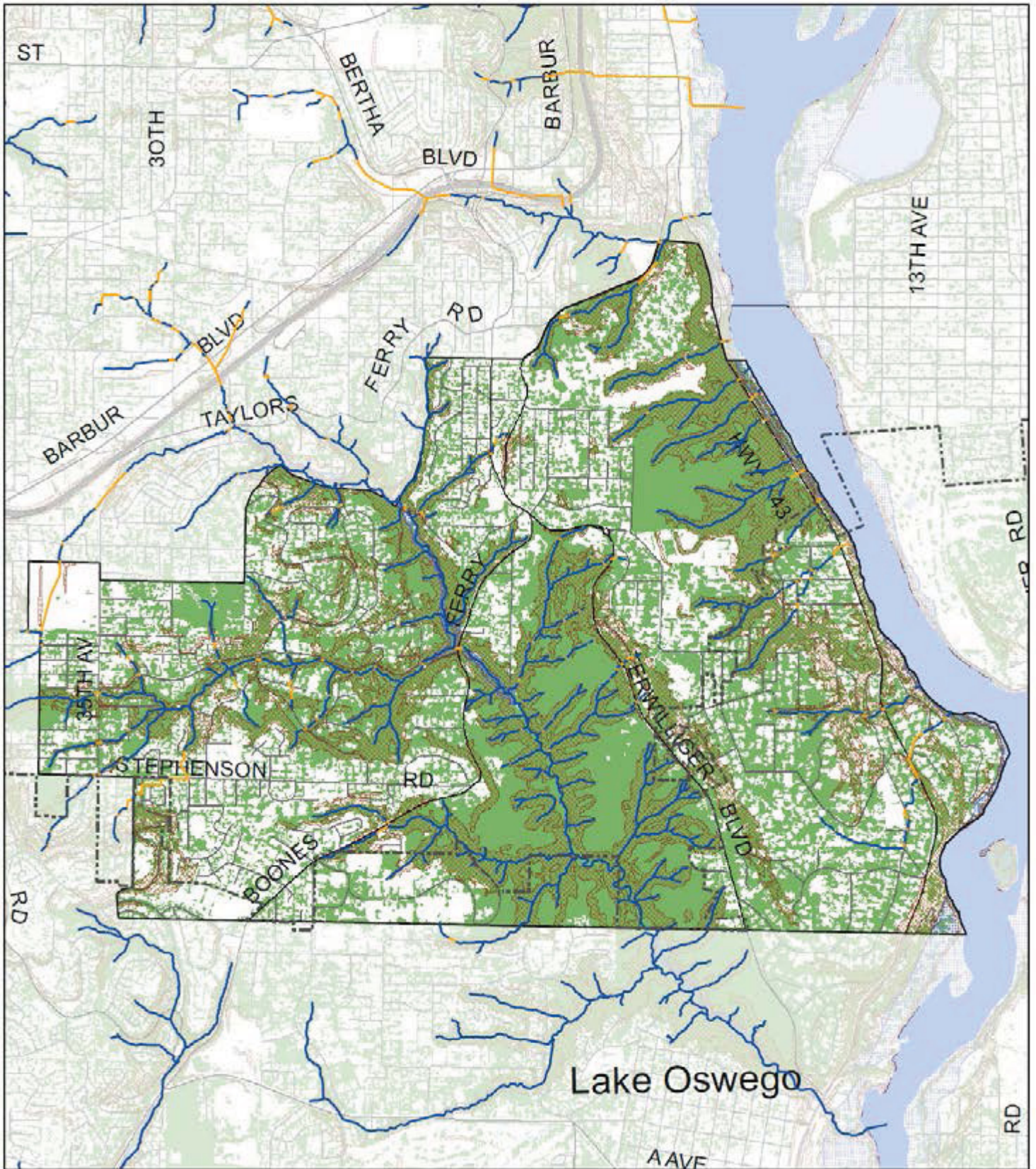
## Portland Watersheds










## Portland Stormwater System

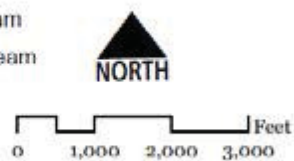


# Tryon Creek-Riverdale Analysis Area



## Watersheds and Natural Features

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



August 9, 2011

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# Tryon Creek-Riverdale Analysis Area Demographics (2000 – 2010)

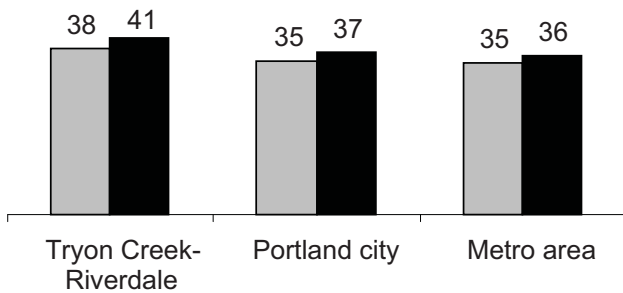
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

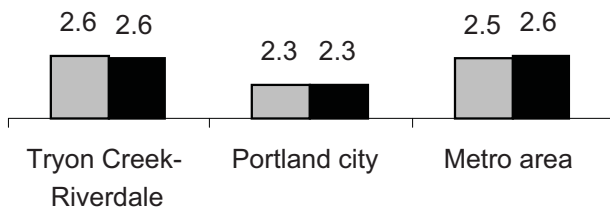
|          | Tryon Creek-Riverdale | Portland city | Metro area |
|----------|-----------------------|---------------|------------|
| 2010     | 9,668                 | 583,776       | 2,226,009  |
| 2000     | 8,884                 | 529,121       | 1,927,881  |
| % change | 9%                    | 10%           | 15%        |

■ 2000 ■ 2010

## Median Age

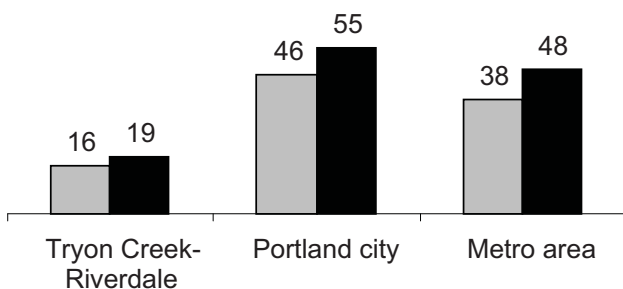


## Average Household Size

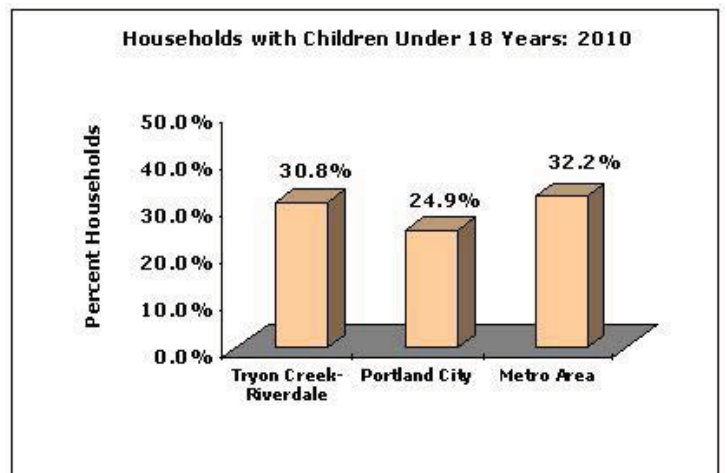
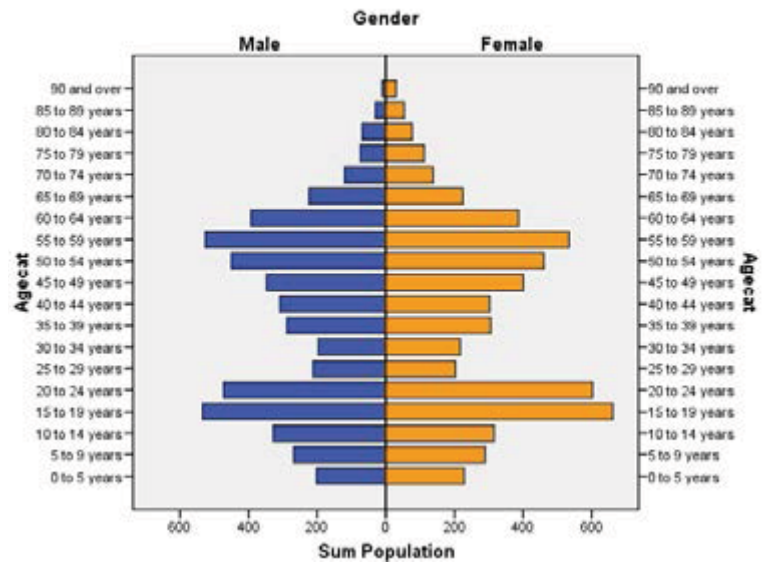


## Diversity Index

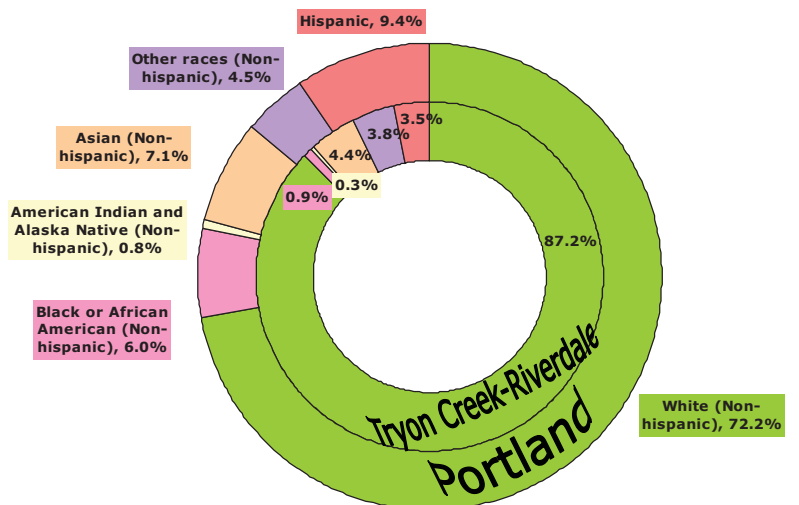
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



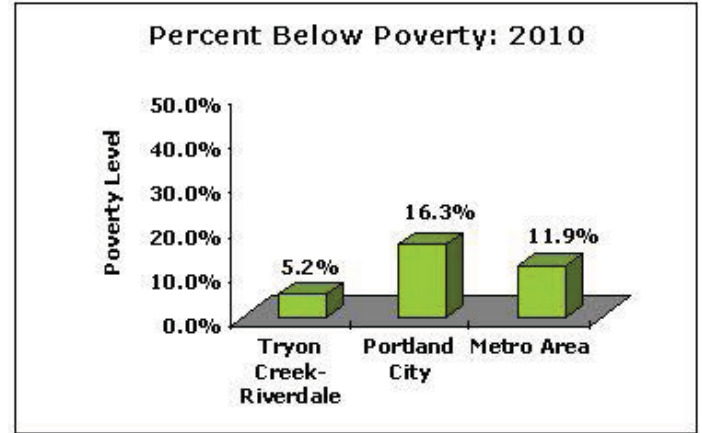
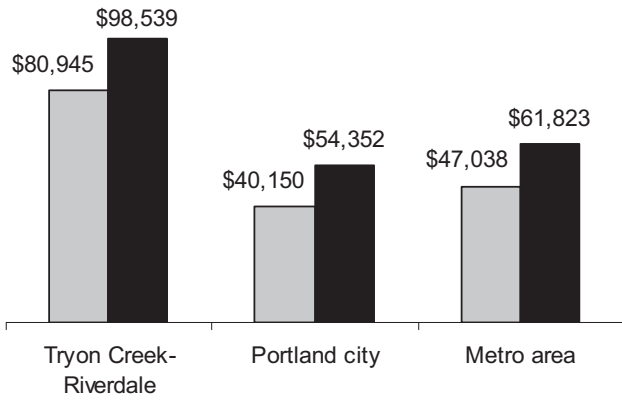
Population Pyramid for Tryon Creek-Riverdale, 2010



Racial and Ethnic Distribution in Portland vs. Tryon Creek-Riverdale

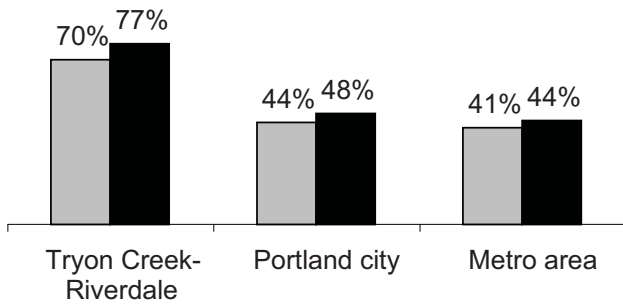


### Median Household Income

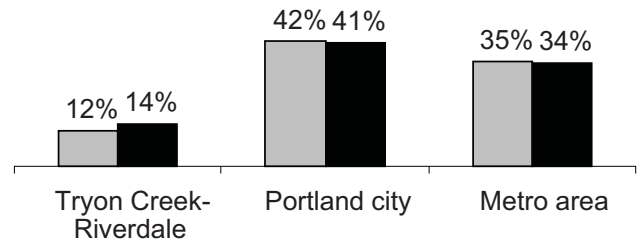


ACS 2006-2010

### Percent College Graduates



### Percent Renters of Occupied Housing Units



### Median Home Value

|          | Tryon Creek-Riverdale | Portland city | Metro area |
|----------|-----------------------|---------------|------------|
| 2010     | \$440,625             | \$253,184     | \$273,500  |
| 2000     | \$264,076             | \$154,721     | \$168,347  |
| % change | 66.9%                 | 63.6%         | 62.5%      |

# Tryon Creek-Riverdale Analysis Area

## Commercial Real Estate Indicators

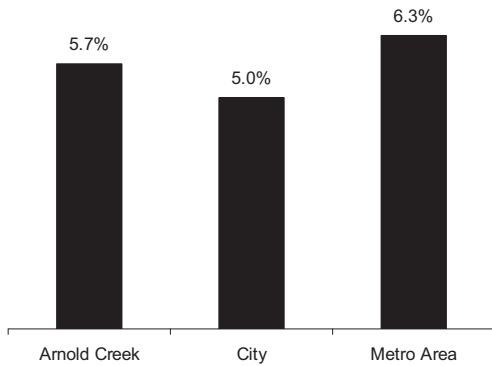
Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

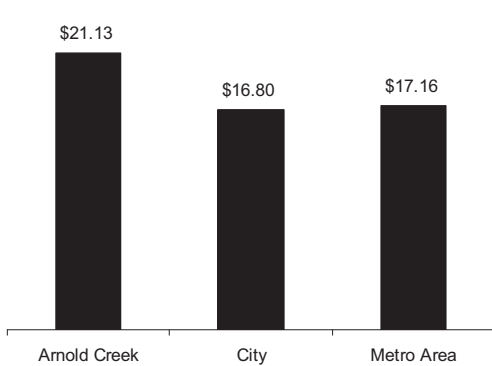
#### Square Feet

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

#### Retail Vacancy



#### Retail Rents

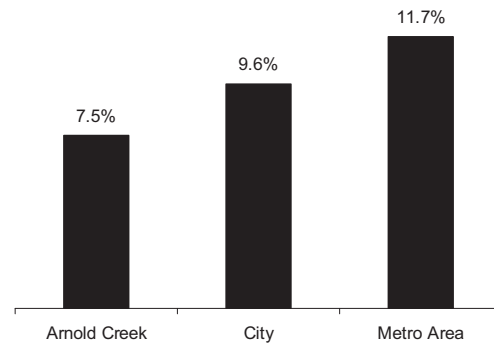


### OFFICE SPACE

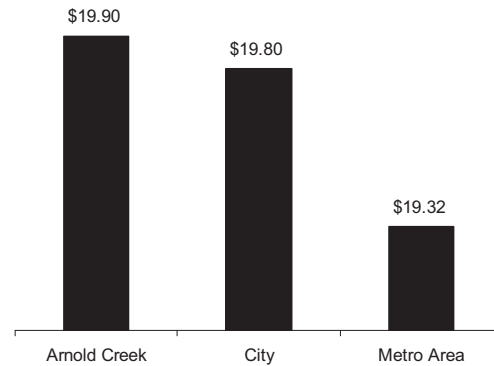
#### Square Feet

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

#### Office Vacancy



#### Office Rents



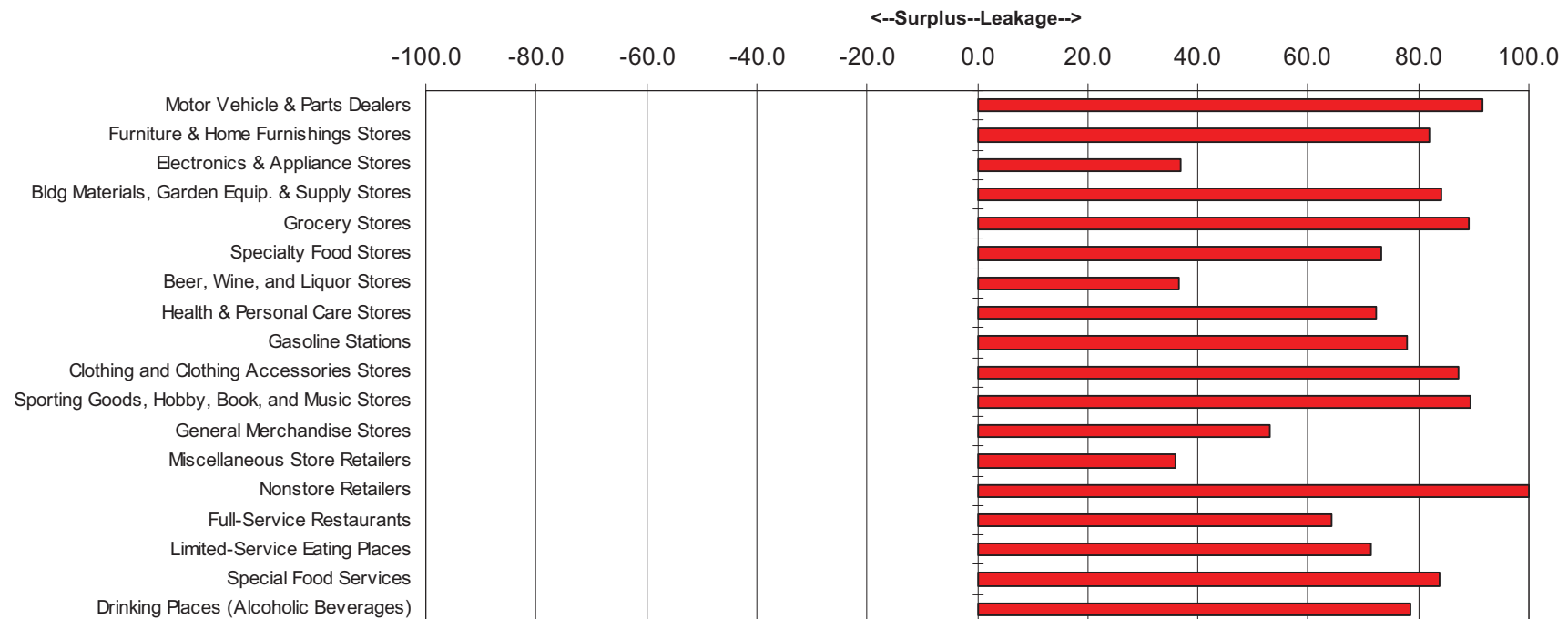
# Tryon Creek-Riverdale Analysis Area

## Retail Market Profile

**Retail Gap = \$140 million**

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

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)



# Tryon Creek-Riverdale Analysis Area

## Employment

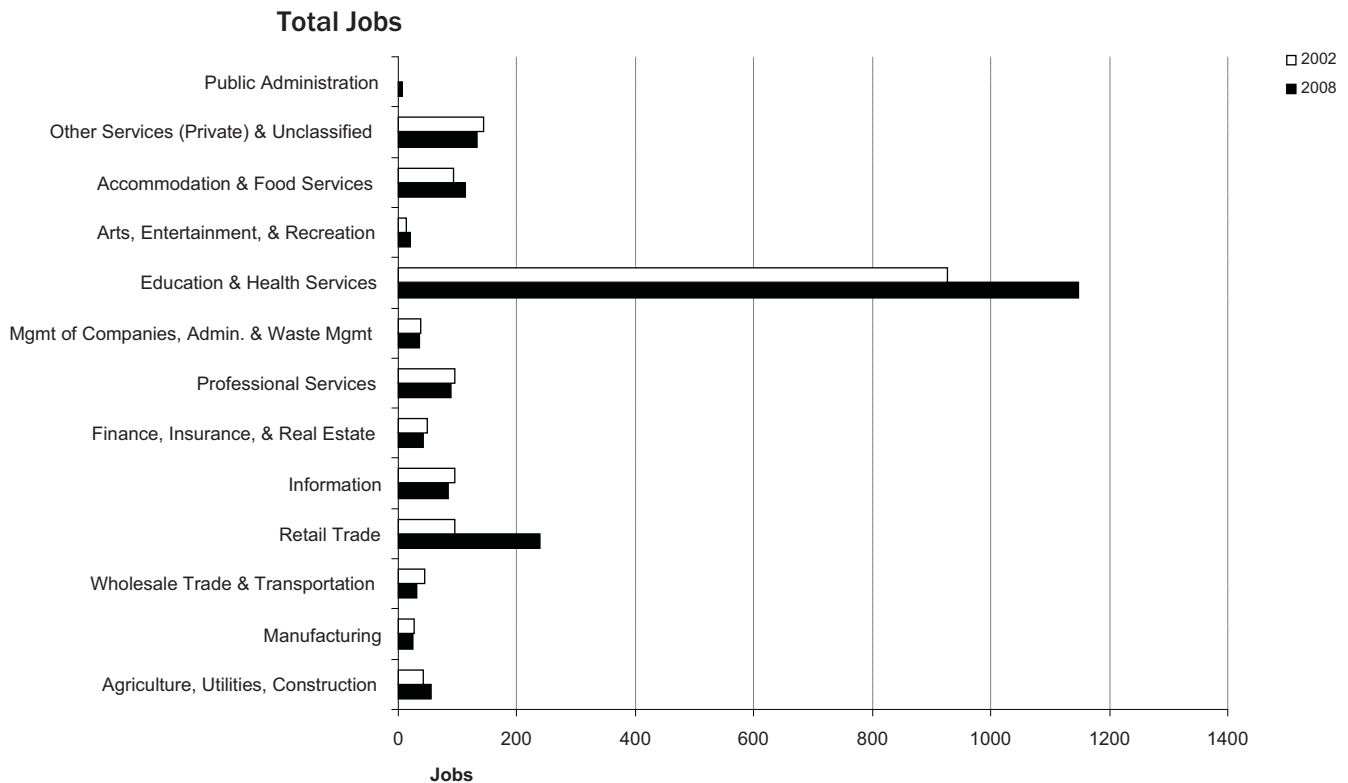
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

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

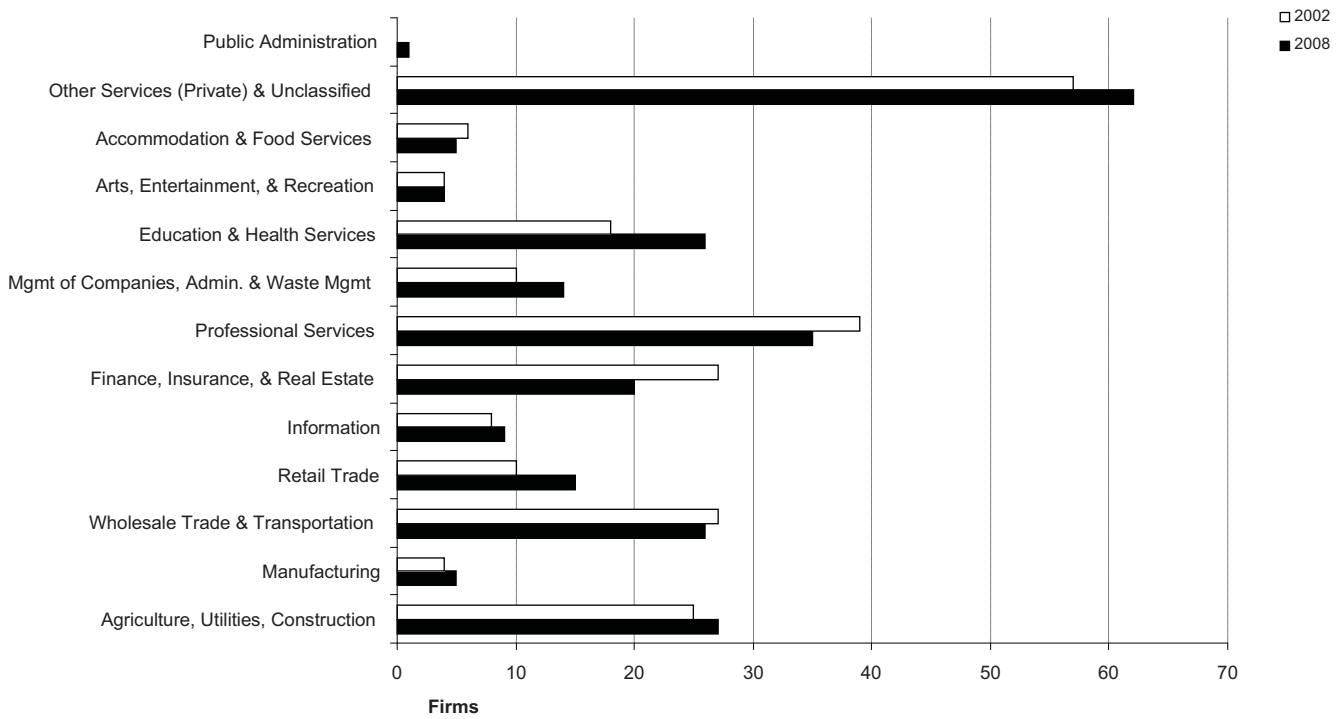
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices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

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





### Total Firms



### Average Annual Wages

