Division Street Commercial Corridor
RETAIL MARKET ANALYSIS

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CITY OF PORTLAND
BUREAU OF
PLANNING

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Study Overview

According to the National Trust for Historic Preservation's Main Street program, "commercial districts [are] the most visible indicator of community pride, along with its economic and social health. It is either an asset or a liability in the effort to recruit new residents, new businesses and industries, retirees, tourists, and others to your community and to keep those you already have."[1] The Main Streets program promotes a four-pronged approach that includes economic restructuring, design, organization, and promotion. Due to limited resources, this study only purports to address some of the economic restructuring elements. Later phases of the Commercial Corridors Project for the city could address the design, promotion, and organizational capacity needs.

This report is part of the second phase of a project that started in 2004. Phase I provided an inventory and assessment of the commercial land uses that can be found along Portland's network of arterial streets outside of the Central City. Ninety three (93) commercial segments were profiled in Phase I (See Appendix A), which focused on activity that can be found along key streets that serve neighborhoods throughout the city. These streets serve many functions and support a broad array of land uses, ranging from residential to commercial and light industrial and manufacturing activities. Nearly all of these streets function as commercial districts or corridors, providing a marketplace of goods and services that serve users ranging from the local neighborhoods to the regional populations.

Phase II of the Commercial Corridor Study, which began in spring 2006 and was completed in winter 2007, incorporates a detailed market analysis of five of the 93 Phase I commercial corridors in the context of citywide baseline market conditions. These corridors include: 82nd Avenue (Glisan Street to Powell Boulevard), Glisan Street from (57th to 82nd Avenue), Division Street (110th to 162nd), N. Lombard Street (Interstate to Carey Ave.), and Sandy Boulevard (57th to 92nd Avenue)

Several factors influenced which corridors were selected for this detailed look at their retail performance: all of the Phase II corridors are challenging commercial areas located outside the Central City and the City's 11 urban renewal areas; they are not currently the subject of formal planning or economic development efforts; most are designated Main Streets in the Metro 2040 Plan, but are not necessarily functioning in that way at this time; all have relatively active business associations that can presumably use the study results to understand the make-up of their corridors and to assist in improving the vitality of these corridors; and lastly, in some cases, the business district association serving the corridor requested that their district be included in Phase II.

One of the key goals of Phase II is to identify market opportunities along each of the selected corridors by inventorying existing conditions such as land use and business composition, quantifying sales activity and identifying demographic and economic drivers impacting market activity. The findings of the Phase II studies will be used to explore future strategies and implementation alternatives for revitalization of the corridors. Further, the studies will be a valuable source of economic, demographic and market data for corridor business owners, business district association representatives and city planners seeking to strengthen the local business climate by providing an objective assessment of market conditions.

[1] See Website for the National Trust's section on "Why Revitalize?", http://www.mainstreet.org/content.aspx?page=2000&section=16

Methodology

This retail market analysis is one tool for identifying retail market trends within a more localized, neighborhood context. In addition to an analysis of demographic data, crime statistics and retail sales potential, Bureau of Planning staff conducted business owner surveys and an "on-the-ground" inventory of existing storefronts, vacant buildings and land. A copy of the business survey is included in Appendix B. The data and surveys from this study will provide an understanding of the local market area that could inform land use planning, economic and business development decisions in the future.

Numerous pool halls and bars, such as the Ranchouse Bar and Grill, shown above, are interspersed along the Division Corridor.

In conducting this study, specific trade areas were defined. In previous market studies a concentric circle around the mid-point of the commercial corridor was an adequate trade area, however, Division Street can be characterized as having multiple commercial centers (nodes) versus a corridor of commercial activity with both neighborhood and community-serving functions. What this means is that the commercial activity centers around major intersections along the 52 blocks of the Division Corridor currently part of this study. Four main centers (nodes) evolve along Division and they include: the intersections of 110th, 122nd, 149th, and 162nd. A drive time analysis of five and ten minutes was conducted (see Figure 5) since the corridor can be characterized as a car-oriented suburban commercial district. While retail and commercial service businesses along the Corridor serve customers beyond the trade areas selected for this study, the majority of customers are presumed to originate within the 5-minute-drive area given the predominance of small businesses and neighborhood retailers along the Corridor. The sales gap analysis will identify gaps in the existing business mix for the neighborhood and community trade areas and identify industries where there is a surplus of goods and services.

Business surveys (See Appendix B) were distributed to businesses abutting "The Corridor." A sixty percent response rate was gathered and consequently reflected in the Business Environment section of the report.

Existing Conditions

Overview of the Division Street Corridor

The most distinguishing feature of the Division Street Corridor (the "Corridor") is the lack of public improvements along the length of the corridor. With almost 100 square feet of curb-to-curb right-of-way, unpredictable sidewalk conditions,[2] lack of safe pedestrian crossings, lack of street trees and sidewalk amenities, such as trash receptacles and covered bus stops, the corridor is characterized by its uninviting and unsafe environment.

The commercial uses along the corridor are predominantly large-format neighborhood shopping centers located at the intersections (nodes) of the corridor. Many of the traffic and safety concerns stem from the build-up of automobiles entering these commercial nodes. Along the stretch of Division are several neighborhood serving small businesses and a few larger suburban-style shopping centers with interspersed low–medium density residential development, all with egresses that channel onto Division Street causing a greater traffic burden. Large tracts of vacant land can also be found along the corridor offering a greater development potential than what other corridors can provide.

The corridor is located approximately 8 miles southeast of downtown Portland and, as shown in Figure 1, extends roughly 2.6 miles along Division Street from 110th Street to 162nd Street. It is considered a Metro regional Main Street and is contained within four Portland neighborhoods including Mill Park, Powellhurst-Gilbert, Centennial, and Hazelwood, and is served by both the Gateway Area (GABA) and Midway (MBA) Business Associations.

TRANSPORTATION

The Division corridor is a heavily traveled corridor with average daily traffic counts of 38,000 to 48,000, depending on the intersection.[3] In addition, the Division Corridor is classified by the City of Portland's Freight Master Plan as a Truck Access Street, which means that it is a route for trucks whose primary activity is delivery of goods and services to the neighborhoods and commercial areas. With two bus lines (see Table 1), one of which is frequent service (running every fifteen minutes), the corridor is relatively well-served by public transit from East to West.

Table 1: Bus Lines Serving the Corridor

Line 4 – Division Street (frequent service) – Gresham Transit Center to Portland City Center
Line 71 – 60th Ave/122nd Ave – Clackamas Town Center to SE 96th Ave and Woodstock Blvd.

[2]On a recent trip to the corridor, a child fell off his scooter and onto the street as a result of sidewalk pavement changes along the corridor. Luckily, there were no oncoming vehicles at that moment.

[3]Portland Department of Transportation traffic count data; 1997, 2004.

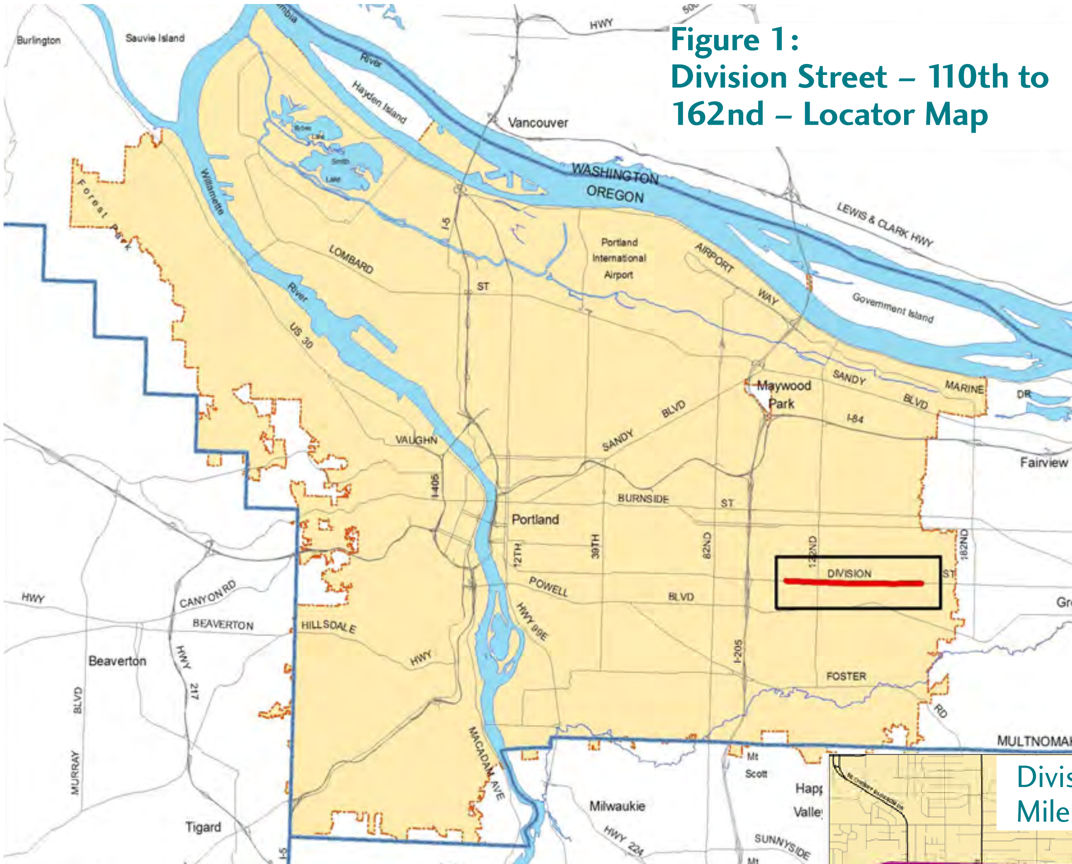
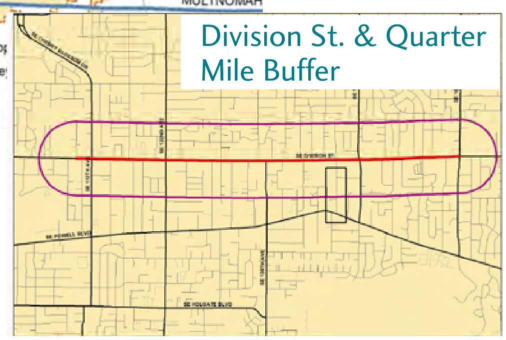


Figure 1:
Division Street – 110th to 162nd – Locator Map



Division St. & Quarter Mile Buffer

LAND USE

As mentioned in the methodology section, this corridor is defined by its commercial node activity. The commercial nodes are zoned General Commercial (GC) which supports an automobile-oriented, low density environment. Along the corridor you will also find neighborhood serving commercial zoning (CN2) and medium-and-low density residential (R1a, R2a, and R3a) zoning. The Multi-Dwelling zones allow for smaller residential dwellings, such as townhouses, as well as larger, multi-story residential buildings located near collector streets and adjacent to commercial areas and transit. Though smaller in numbers, the neighborhood-based businesses exist throughout the length of the corridor.

The corridor businesses are predominantly housed in suburban shopping centers with anchor department stores and smaller retail chain stores. The Corridor competes with major community shopping centers in Portland, including Mall 205, which is located approximately 1 mile northwest of the Corridor, and Eastport Plaza, which is located approximately 1.5 miles southwest of the Corridor. Many of the commercial and retail services offered by Corridor businesses can be found in other corridors, but some are ethnic niche markets established by Eastern European and Asian communities.

Besides single-family houses and multi-family apartments and condos, residential uses along the Corridor also include a large number of mobile home parks. The number of units at these mobile home parks varies. Some mobile home parks such as the Rainbow Villa have less than fifty units. Others such as Tall Firs has over fifty units. Some mobile home parks such as Rollin" Wheels Mobile Estates operate on an even larger scale with possibly over a hundred units.

RECENT DEVELOPMENT

Signs of commercial development in the Corridor are modest. Over 57,000 square feet of new, though mostly residential, development has occurred in the last 5 years, including the Carlwood Condominiums and a new neighborhood shopping center. Other types of remodeling or modifications to existing commercial sites have been minimal. At the west end of the Corridor, businesses such as Truax Builders Supply and the Bike Gallery have remodeled in recent years. The Pink Feather restaurant, which caught on fire in October of 2007 has since been remodeled and reopened. In the same year, a drive-thru Starbucks opened at 12613 SE Division, six blocks away from another Starbucks. These investments send signals to the community and other businesses that this is a worthwhile area to invest.

Condominiums have been for sale at Carlwood Condominiums.

Mix of Businesses and Land Uses

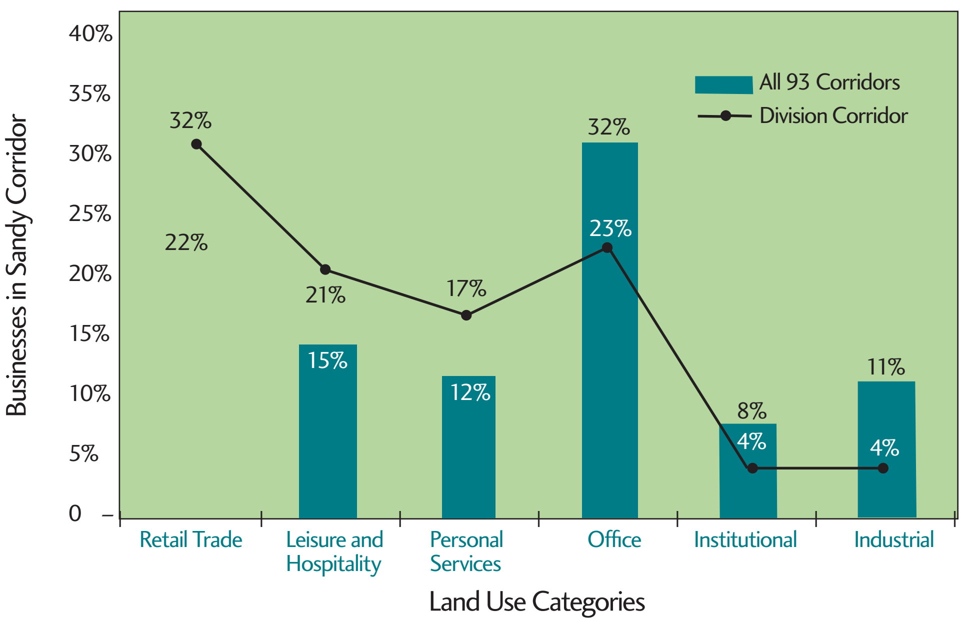
The composition of businesses along a commercial corridor significantly influences its identity, attractiveness, and ability to capture sales. This section of the report provides a detailed inventory of businesses and land uses on the Division Corridor. An examination of business and employment activity in comparison to the 93 citywide corridors and an analysis of the industry mix along the Corridor are also provided.

A variety of businesses, including both franchisees and independent small businesses, congregate along one side of the Division Center.

DIVISION ST. IN RELATION TO OTHER CORRIDORS

Figures 2 and 3 below show the percentage of businesses and employees by land use category along the Division Corridor in comparison to the 93 commercial corridors citywide identified in Phase I of this study. This Corridor is comprised of 179 businesses employing an estimated 1,443 persons compared to 6,777 businesses in all 93 corridors employing an estimated 64,941 persons. [4]

Figure 2: Percentage of Businesses by Land Use Category



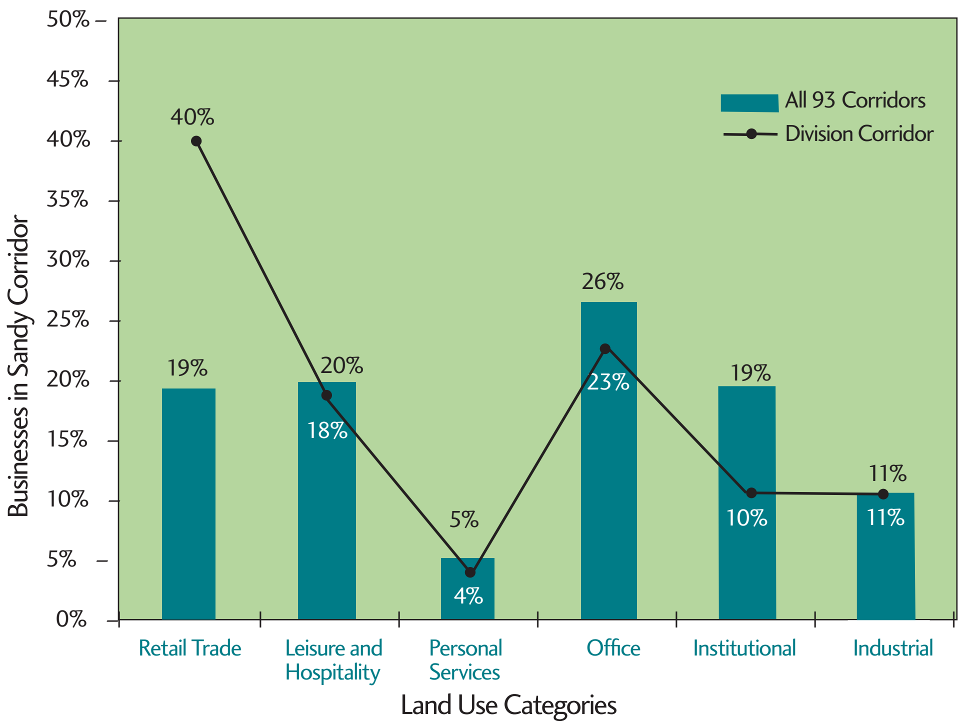
InfoUSA, 2005 data for 93 Corridors. Bureau of Planning Land Use Inventory for Division Street Corridor.

[4] Since a comprehensive on-the-ground land use and business inventory was conducted along the Division Street Corridor, the business data reported for the Corridor in Figure 2 may be more accurate than the data reported for all 93 corridors, which is based solely on InfoUSA data that dates back to 2005. Similarly, in Figure 3, the reported percentages of employees by land use within the Corridor and all 93 corridors are based on 2005 InfoUSA data and may not be comprehensive.

Findings:

- The business mix along the Division Corridor is different from the corridors citywide. The highest proportion of businesses along Division belongs to the Retail Trade (32 percent) and the Leisure and Hospitality (21 percent) categories; compared to citywide at 22 and 15 percent, respectively.
- Personal Services are also higher than citywide uses, 17 percent compared to 12 percent, respectively.
- The corridor is made up of primarily Retail Trade businesses such as pet shops, motor vehicle and parts dealers, and convenience food stores, Leisure and Hospitality businesses such as bars, restaurants, and fast food franchises, and lastly, Personal Services such as hair salons, auto repair shops, and drycleaners.

Figure 3: Percentage of Employees by Land Use Category



InfoUSA, 2005 data for 93 Corridors. Bureau of Planning Land Use Inventory for Division Street Corridor.

Findings:

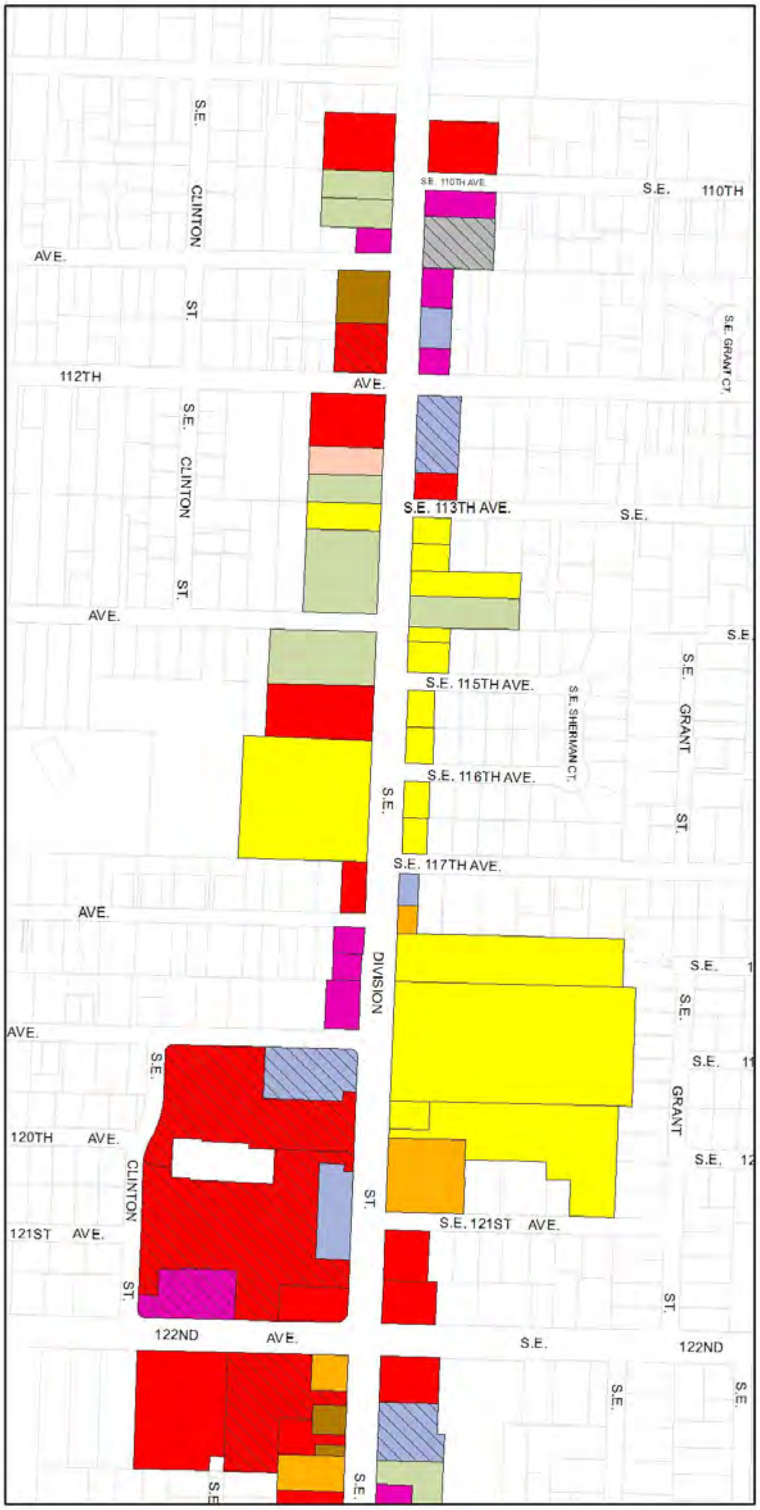
- Relative to all corridors citywide, the percentage of Office employees in the Corridor is significantly higher – 43 percent compared to 26 percent for all 93 corridors.
- There are fewer Institutional workers along the Corridor – 10 percent compared to 19 percent citywide. While the Corridor has a smaller percentage of employees working in the Industrial and Retail Trade industries, the difference is a modest five percent.
- The percentage of employees working in the Leisure and Hospitality and Personal Services industries is equal or close to equal (within a single percentage point) within the Corridor and all corridors citywide.

LAND USE INVENTORY

A review of existing land use and development patterns can provide useful information about how an area has evolved over the years and what type of development is likely to occur in the future. In fall 2008, the Bureau of Planning conducted a land use inventory along the Division Corridor. The inventory identified employment uses and non-employment uses such as community facilities, open space, vacant land and space for lease. The Corridor is comprised of 179 businesses on 107 tax lots and single- and multi-family housing on 118 tax lots. The land use map in Figure 4 illustrates existing uses by tax lot. Tax lots with multiple uses were assigned a single land use based on the use that supports the largest amount of building square footage, but shows if it is multi-use property. The land-use maps below show the dispersal of uses along the corridor and highlights the commercial centers of the corridor.

Two of the major shopping centers along the Corridor are the Division Center at 122nd and SE Division and the Fred Meyer shopping center at 148th and SE Division. These shopping centers contain a mix of small national chains and large-format chain stores such as Rite Aid and Albertsons.

Figure 4:
Land Use Map – West Section



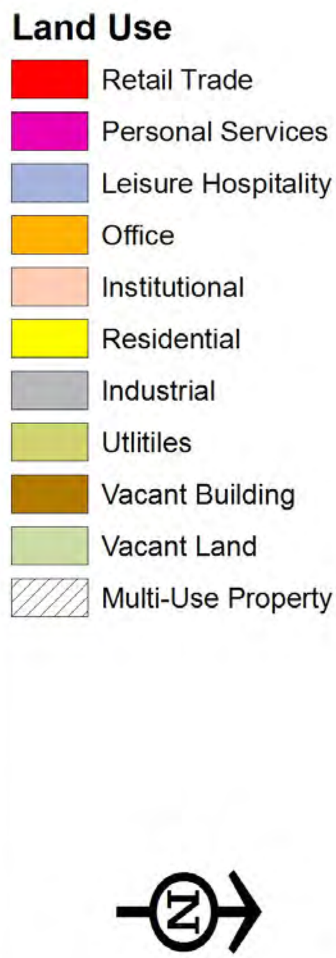
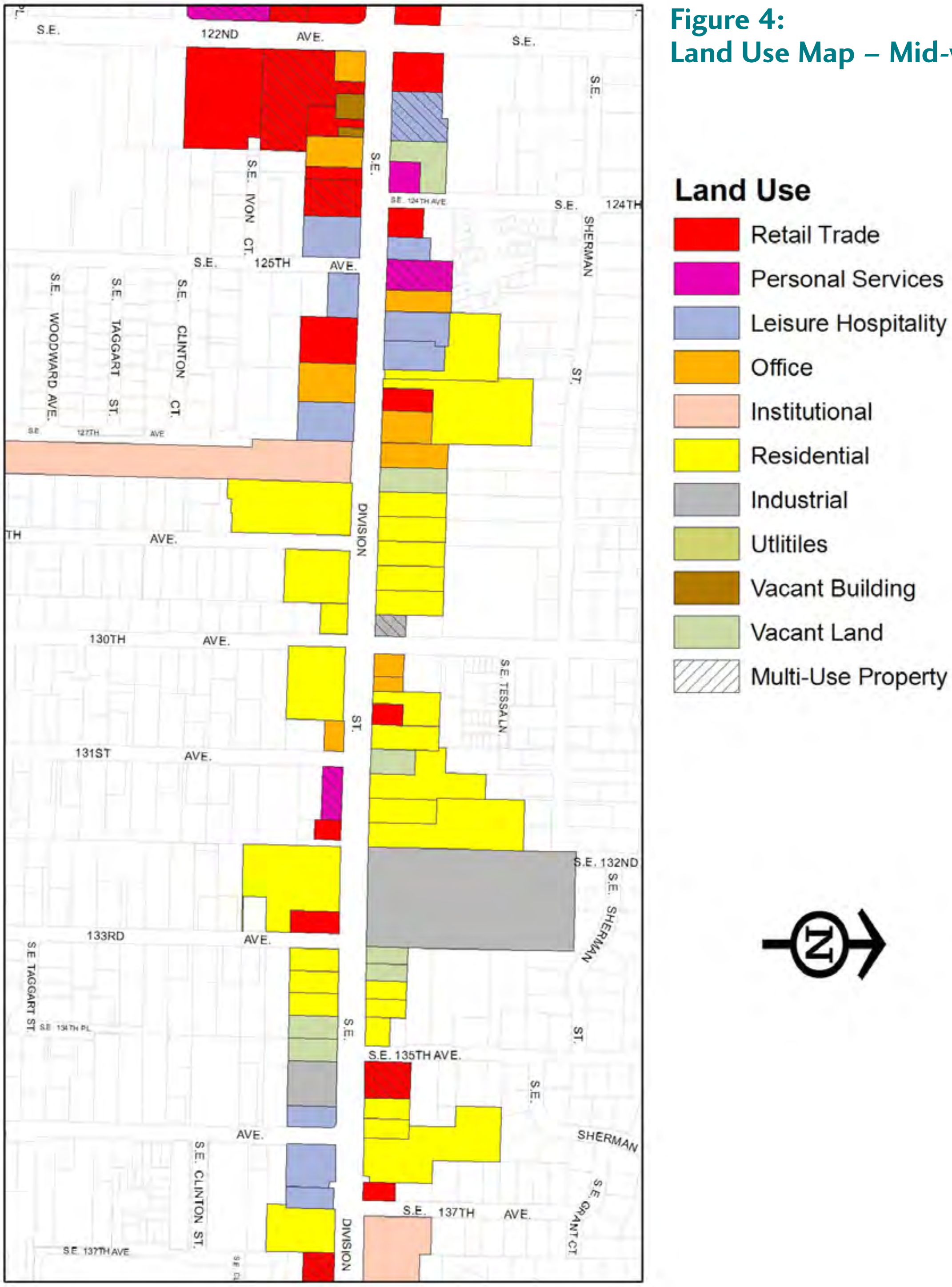


Figure 4:
Land Use Map – Mid-west Section



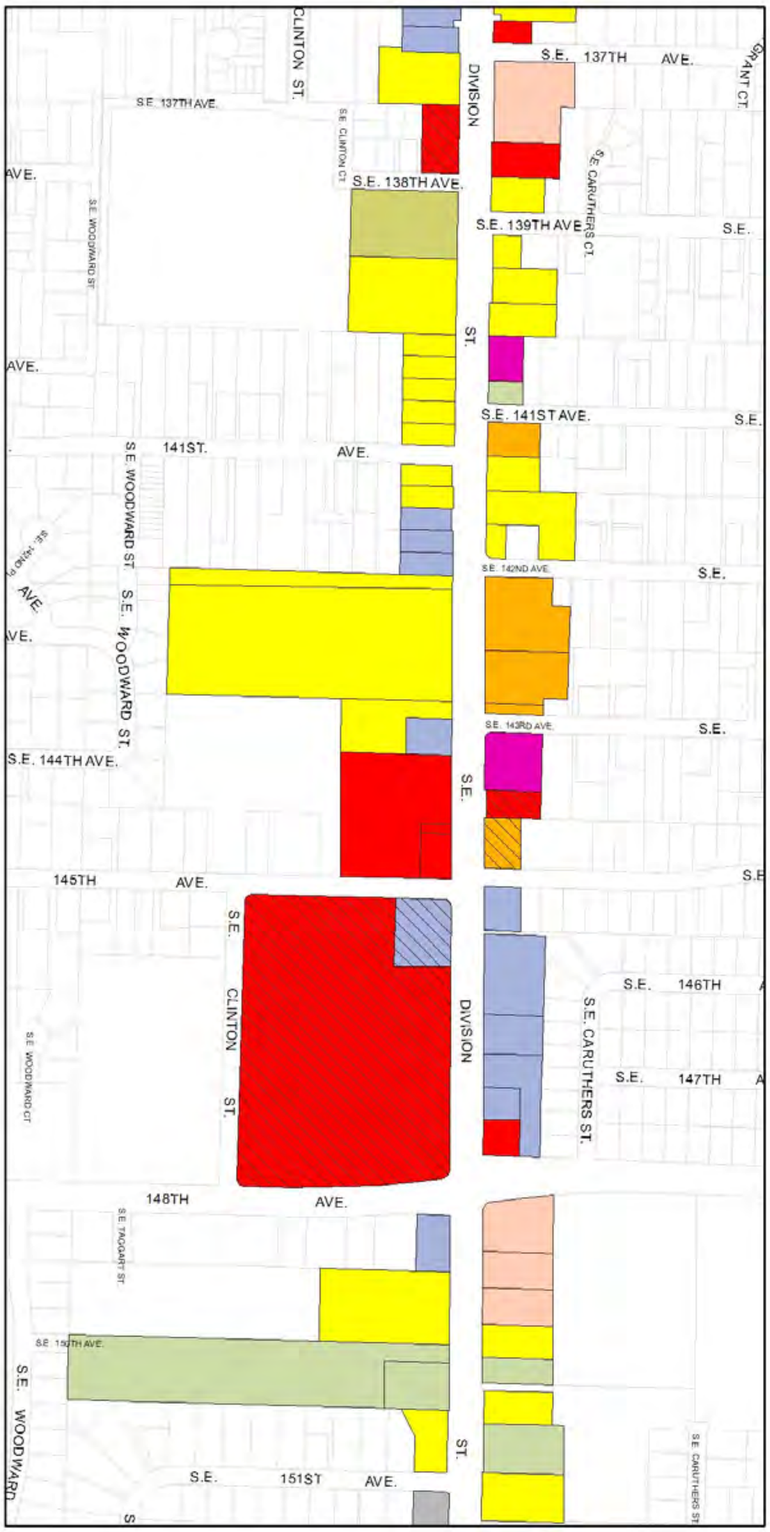
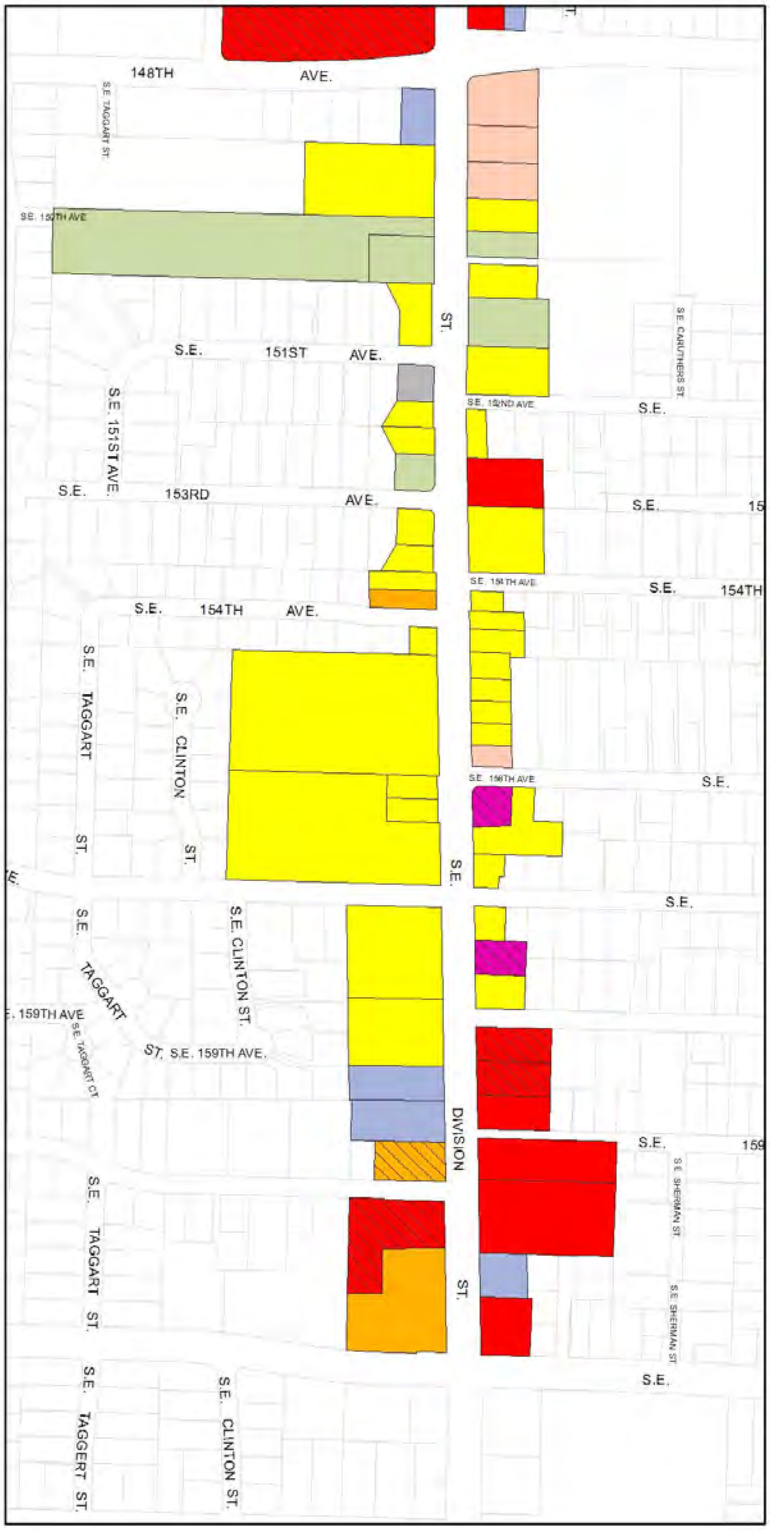


Figure 4: Land Use Map – Mid-east Section

Land Use

- Retail Trade
- Personal Services
- Leisure Hospitality
- Office
- Institutional
- Residential
- Industrial
- Utlitiles
- Vacant Building
- Vacant Land
- Multi-Use Property

Figure 4:
Land Use Map – East Section



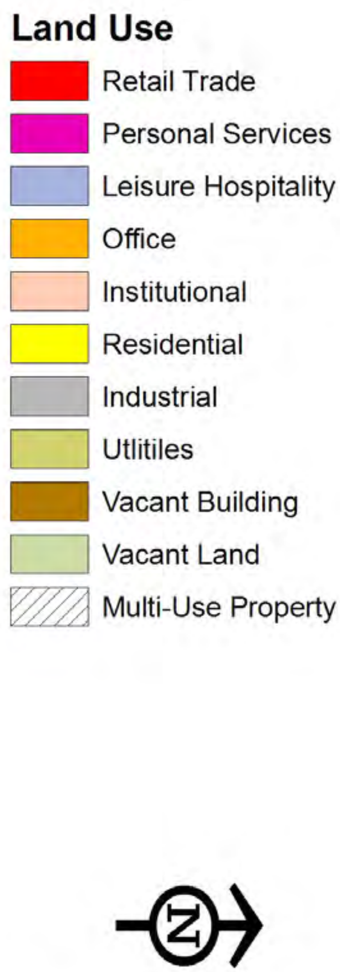


Table 2 provides a summary of land uses within the Division Corridor. The employment uses are categorized by six general uses, including Retail Trade, Leisure and Hospitality, Personal Services, Office, Institutional and Industrial, with more detailed uses within each of these broad categories. The table also includes building square footage to illustrate the use and/or availability of space for each category, but does not provide the potential square footage based on consumer demand (i.e. consumer expenditure data and sales per square feet in each category).

Since the size of tax lots in commercial areas can vary significantly, comparing the total building square footage occupied by different uses is a more effective way to gauge the overall physical and economic character of a corridor. Predominant uses along the corridor include Retail Trade (including motor vehicles and food and beverage stores) and Office, occupying 49 percent and 19 percent of the Corridor's total building square feet, respectively.

Table 2: Summary of Land Uses

Land Use Category	NAICS Codes	Number of Tax lots	Percent of Total Uses	Building Square Footage	Percent of Total Square Footage
EMPLOYMENT USES					
Total Retail Trade		59	33%	383,272	49%
Motor Vehicle Dealers	4411-3	9	5%	29,789	4%
Food and Beverage Stores	445	10	6%	200,670	26%
All Other Retail Trade	*	40	22%	152,813	20%
Leisure and Hospitality		37	21%	83,336	11%
Restaurants and Bars	722	35	20%	80,392	10%
Lodging	721	0	0%	0	0%
Arts, Entertainment and Recreation	711-3	2	1%	2,944	0%
Personal Services		30	17%	44,862	6%
Automotive Repair and Maintenance	8111	7	4%	13,502	2%
Personal Care and Laundry Facilities	812	21	12%	28,073	4%
Other Repair and Maintenance	8113-4	2	1%	3,287	0%
Office		39	22%	147,552	19%
Medical and Dental Offices	621	8	4%	10,544	1%
Professional and Business Services	541, 551, 561	8	4%	12,864	2%
Financial Activities	521-5, 531-3	23	13%	124,144	16%
Information	511-2, 515-9	0	0%	0	0%
Government	921-8	0	0%	0	0%
Institutional		7	4%	94,513	12%
Religious, Community and Social Service Institutions	813, 624	4	2%	85,477	11%
Schools and Colleges	611	3	2%	9,036	1%
Medical Centers and Residential Care Facilities	622-3	0	0%	0	0%
Industrial[1]	**	7	4%	21,291	3%
Total Employment Uses		179	100%	774,826	100%
NON-EMPLOYMENT USES					
Residential[2]		91	77%	881,483	64%
Vacant Residential[3]		1	1%	1,723	0%
Vacant Building or Storefront[4]		7	6%	16,687	1%
Vacant Land[3]		19	16%	484,394	35%
Open Space		0	0%	0	0%
Total Non-Employment Uses		0	100%	1,384,287	100%

[1]Includes the following NAICS Industry Sectors: Utilities, Construction, Manufacturing, Wholesale Trade. Transportation and Warehousing, Waste Management and Remediation, Agriculture and Mining.
* 442-4, 446-8, 451-4
**111-5, 211-3, 221, 236-8, 311-6, 321-7, 331-9, 423-5, 481-8, 491-3, 562,
[2]One is zoned CG, one is zoned CN2, thirty four are zoned R1, eighteen are zoned R2, and thirty seven are zoned R3.
[3]This is zoned R1.
[4]Five are zoned CG and two are zoned CN2.
[5]Four are zoned CG, two are zoned CM, one is zoned CN2, and six are zoned R3.

Findings:

- Retail Trade is the predominant employment use, represents 33 percent of total businesses, while Office, Leisure and Hospitality, Personal Services-related businesses constitute 22 percent, 21 percent, 17 percent, respectively. Institutional and Industrial-related businesses each constitute 4 percent of the employment uses. While weighing more heavily toward retail, it is evident that the distribution of employment uses are fairly diversified among the land use categories of Retail Trade, Office, Leisure and Hospitality, Personal Services. Institutional and Industrial businesses represent smaller shares of employment uses in the Corridor.
- In terms of building square footage, Retail Trade uses the most space, constituting 49 percent of total employment-use square footage. Office use represents 19 percent of the total employment-related land uses, Institutional represents 12 percent, Leisure and Hospitality represents 11 percent, Personal Services represents 6 percent, and Industrial represents 3 percent. As illustrated in Table 2, business numbers do not necessarily reflect the building square footage organizations occupy. For instance, 30 Personal Services businesses use less than half the amount of space that the seven organizations in the Institutional category occupy.
- 91 of the 118 non-employment use tax lots are classified as Residential indicating that most of the non-employment uses are for single- or multi-family housing. There are 19 tax lots of vacant land, seven tax lots of vacant building or storefront, and one tax lot of vacant residence. Potential for redevelopment exists in the 19 vacant land tax lots along the Corridor totaling approximately 11 acres and in the 7 vacant buildings or storefronts with 16,687 square feet of space available for retail/commercial uses.

INDUSTRY MIX

Table 3 at right shows the distribution of Corridor businesses by National American Industry Classification System (NAICS) industry sector. NAICS is a standardized system used in the United States and Canada to classify different industries. Table 3 provides an overview of the Corridors industry makeup at the broadest level using two-digit NAICS codes. Tables 4 to 6 provide more detail for three of the main industry sectors (Retail Trade, Accommodation and Food Services, and Other Services,) along the Corridor using three- and five-digit NAICS codes. Similar to the land use survey, the business composition analysis reveals that most Corridor businesses specialize in retail trade and services.

Table 3: Business Composition by Industry

NAICS Industry Sector	NAICS Codes	Number of Businesses	Percent of Total Uses
Construction	23	2	3%
Manufacturing	32-33	3	2%
Wholesale Trade	42	2	2%
Retail Trade	44-45	59	16%
Transportation and Warehousing	48-49	0	1%
Information	51	0	1%
Finance and Insurance	52	16	7%
Real Estate Rental and Leasing	53	7	4%
Professional, Scientific, and Technical Services	54	5	7%
Administrative/Support Services	56	3	6%
Educational Services	61	4	2%
Health Care and Social Assistance	62	10	6%
Arts, Entertainment, and Recreation	71	2	1%
Accommodation and Food Services	72	35	20%
Other Services	81	31	17%
Public Administration	92	0	0%
Total Businesses	-	**179**	**100.0%**

Source: Portland Bureau of Planning 2007

Table 4 shows the distribution of businesses for the category, “Other Services” by 3-Digit NAICS classification.

Table 4: Other Service Businesses by 3Digit NAICS

3-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Motor Vehicle and Parts Dealers	441	9	15%
Furniture and Home Furnishing Stores	442	2	3%
Electronics and Appliance Stores	443	4	7%
Food and Beverage Stores	445	11	19%
Bldg. Material and Garden Equip. & Supplies Dealers	444	1	2%
Health and Personal Care Stores	446	1	2%
Gasoline Stations	447	4	7%
Clothing and Clothing Accessories Stores	448	5	8%
Sporting Goods, Hobby, Book, and Music Stores	451	6	10%
General Merchandise Stores	452	1	2%
Miscellaneous Store Retailers	453	14	24%
Nonstore Retailers	454	1	2%
Total		**59**	**100%**

Source: Portland Bureau of Planning 2007

Findings:

Located at the corner of 135th and SE Division, this small shopping center contains not only an ethnic video rental store but also retailers specializing in selling carpeting, cigarettes, and ethnic convenience goods.

- Miscellaneous Store Retailers constitute 24 percent of Retail Trade businesses along the Corridor. The types of miscellaneous store retailers at the corridor include pet shops, tobacco stores, and an assortment of gift and hobby retailers. Bird Hut, Caye’s Pets, and A-Z Pets, as well as, large “category killers” such as Petco, are located along the corridor. Retailers of cigarettes, cigars, tobacco, pipes, and other smokers’ supplies include Head East, Roll Your Own, and The Price is Right Cigarettes. Gift shops such as CardSmart and florists such as Van Kirk’s can be found at the corridor. Hobby stores not easily classifiable using NAICS such as The Glass Source/A Bead Source, Coin Shop, K-Ce Jrs are also available on Division. Besides the aforementioned businesses, second-hand CD vendor, CD & Game Exchange, and landscape stone supplier, All About Stone, are also grouped under the Miscellaneous Store Retailers category.
- Motor Vehicle and Parts Dealers and Food and Beverage Stores make-up another 34 percent of the Corridor’s retail businesses. There are nine motor vehicle and parts dealers—Division Tire Inc., Firestone, Knecht’s Auto Parts, Tosan Motors, Terry’s Cycle Center, The Wheel Shoppe, and Godz Isle Auto Sales. The eleven (10 out of the 11 are convenience food stores) food and beverage stores are Best Buy #2 Market, USA Market, ВЕУЕРННД, 7-Eleven, K.S. Food Market, Plaid Pantry, Campers, Original Steer Market, US Market, Bob’s Corner Grocery, and Albertson’s.

Table 5 below shows the distribution of Accommodation and Food Services businesses by 5-Digit NAICS classification.

Table 5: Retail Trade Businesses by 3-Digit NAICS

3-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Full-Service Restaurants	72211	9	26%
Limited-Service Eating Places	72221	19	54%
Mobile Food Services	72233	2	6%
Drinking Places (Alcoholic Beverages)	72241	5	14%
Total		35	100%

Source: Portland Bureau of Planning 2007

Findings:

- Full Service Restaurants and Limited Service Eating Places (i.e. fast food) comprise 80 percent of the Corridor's Accommodation and Food Service employers (35 businesses). Full-service restaurants include Tik Tok Around the Clock, Sista's Soul Food & Grill, Pizza Baron, Maverick Restaurant, Hong Kong Restaurant, Pink Feather, La Cabãna, Ranchhouse Bar & Grill, and Cruiser's Drive-In. Fast food franchises located on the Corridor include Taco Bell, KFC, Arctic Circle, Quiznos Sub, Taco Del Mar, Papa Murphy's, Burger King, Dairy Queen, Papa John's Pizza, and Carl's Jr. Other limited-service eating places, which include cafes, are Briz Deli & Lottery, Dotty's, Foxy's, Keli's Café and Lottery, Starbucks Coffee, Teriyaki King, Dutch Bros. Coffee, Don Camaron Mexican Food & Seafood.

A series of restaurants including Pink Feather and La Cabãna, shown above, lead to the commercial node at 145th Ave and SE Division.

- Businesses in the Mobile Food Services category and the Drinking Places (Alcoholic Beverages) category constitute the other 20 percent of the Corridor's Accommodation and Food Service employers (7 businesses). Night clubs at Division include The Beach Club, La Cueva Night Club, and Bora Bora Night Club. Bars include Duke's Bar & Grill and Peanut Farm Tavern. Some food vendors along the Corridor operate their business from motorized vehicles and nonmotorized carts (informal food-cart industry). These businesses are Ohh Expresso and The Little Yellow Hut.

Table 6 below shows the distribution of businesses for the category, "Other Services" by 5-Digit NAICS classification.

Table 6: Other Services Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Automotive Body, Paint, Interior, and Glass Repair	81112	3	10%
Automotive Mechanical and Electrical Repair and Maintenance	81111	2	6%
Coin-Operated Laundries and Drycleaners	81231	1	3%
Drycleaning and Laundry Services	81232	3	10%
Hair, Nail, and Skin Care Services	81211	14	45%
Home and Garden Equipment and Appliance Repair and Maintenance	81141	2	6%
Other Automotive Repair and Maintenance	81119	2	6%
Other Personal and Household Goods Repair and Maintenance	81149	1	3%
Other Personal Care Services	81219	1	3%
Pet Care Services	81291	1	3%
Religious Organizations	81311	1	3%
Total		31	100%

Source: Portland Bureau of Planning 2007

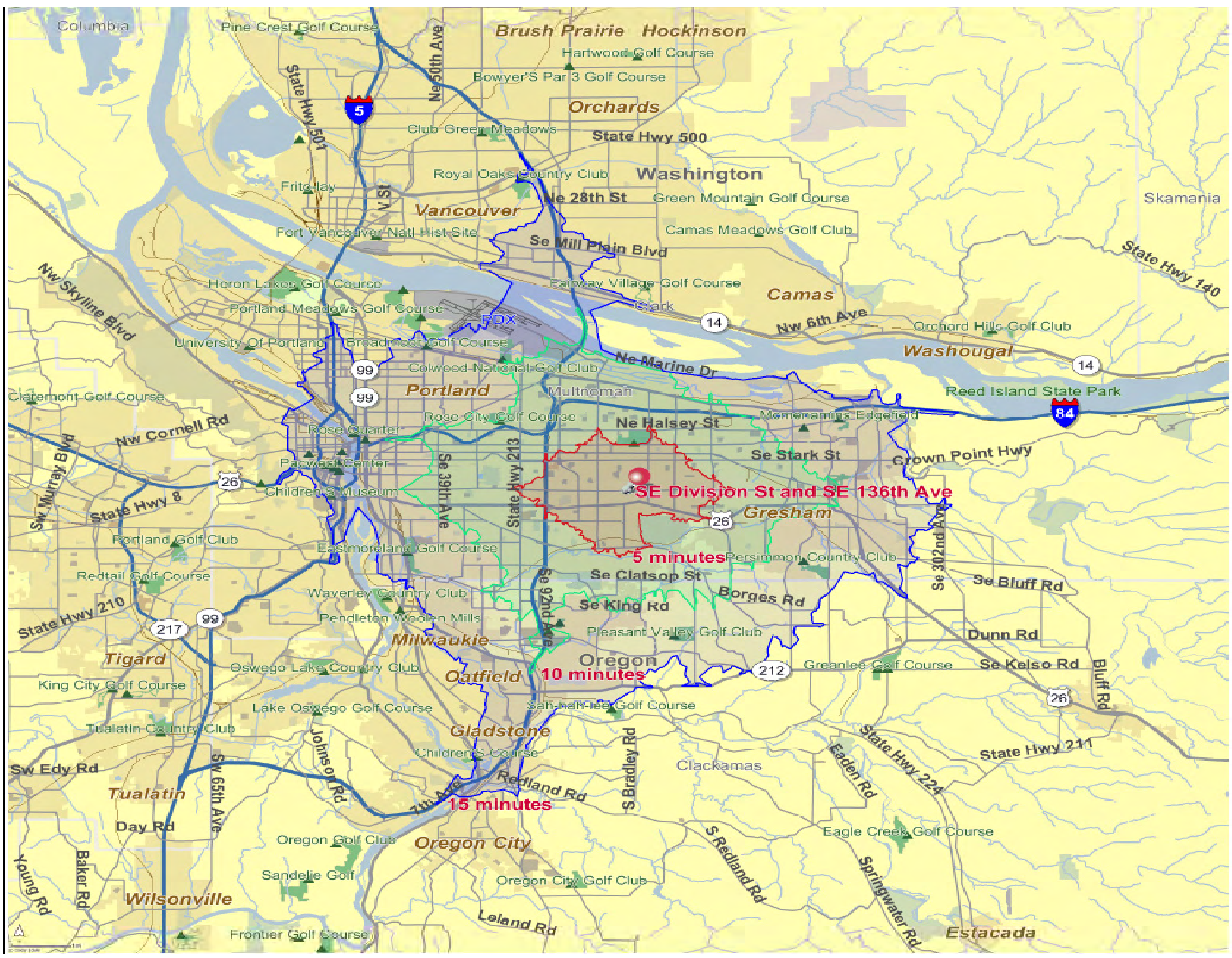
Findings:

- Businesses specializing in Hair, Nail and Skin Care Services are well represented along the Corridor, accounting for 45 percent of businesses in the "Other Services" industry.
- Automobile related businesses including industry sub sectors, Automotive Body, Paint, Interior, and Glass Repair, Automotive Mechanical and Electrical Repair and Maintenance, and Other Automotive Repair and Maintenance, account for 22 percent of businesses in the "Other Services" industry.
- Businesses in the Coin-Operated Laundries and Drycleaners and Drycleaning and Laundry Services industry sub sectors account for 13 percent of businesses in the "Other Services" industry.

Demographics

This section is designed to provide a technical examination of the conditions that impact the market demand for the Division Corridor. Market demand is a function of the disposable income that may be spent within the defined trade areas of a specified development or commercial district. The combined spending of residents, employees, and visitors to an area represents the ability of these groups to support commercial uses. Demand is based on the spending power that is available. As described in the Methodology, the majority of potential customers are assumed to be drawn from a five-minute drive time originating from the Corridor's center point (see Figure 5). While the Corridor functions primarily as a neighborhood and community serving commercial center, some of its retail sales originate from beyond the neighborhood and community trade areas.

Figure 5: Map of Neighborhood (5-minute) and Community (10-minute) Trade Areas



Source: ESRI Business Analyst and Portland Bureau of Planning.

Understanding trade area demographics, including population and household trends, helps existing businesses and prospective investors assess the market demand for retail goods and services. Typically, consumer demand is fueled by individual or household purchases and anticipated household or population growth may indicate future opportunities for a retailer. A summary of key neighborhood and community demographic data is presented below, with more detailed data provided in Appendix C. Population and household characteristics for Division Street were analyzed using US Bureau of the Census 2000 Census Population and Housing data, Metro household and employment data and ESRI Business Analyst data.

POPULATION AND HOUSING TRENDS

Household and Employment Characteristics

With the exception of regional retailers, including large-format stores such as Costco, Wal-Mart or Home Depot that draw customers from a large market area, the number of households in the surrounding area is an important consideration for retail and service sector businesses that rely heavily on the patronage of neighborhood and community residents. Similarly, understanding trade area employment characteristics, including the number of persons employed and the most commonly represented types of employment (i.e. retail, service, etc.), is important because during lunchtime and the commute to work, local workers may patronize businesses close to their workplace.

Table 8 provides Metro 2005 household estimates and 2030 household forecasts for the neighborhood and community trade areas and the City of Portland. Table 9 provides Metro 2005 employment estimates and 2030 employment forecasts for the neighborhood and community trade areas and the City.

Table 8: Household Estimates and Forecasts[1]

	2005 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	28,365	35,468	25%
Community Trade Area	118,343	145,937	23%
Portland	235,180	299,355	27%

Source: Metro

[1]Includes Metro Transportation Area Zones (TAZs) that have their center within the designated geography.

Table 9: Employment Estimates and Forecasts[1]

	2005 Employment Estimate	2030 Employment Projection	Projected Growth
Neighborhood Trade Area	21,139	31,045	47%
Community Trade Area	119,569	184,185	54%
Portland	437,297	599,997	37%

Source: Metro

[1]Includes Metro Transportation Area Zones (TAZs) that have their center within the designated geography.

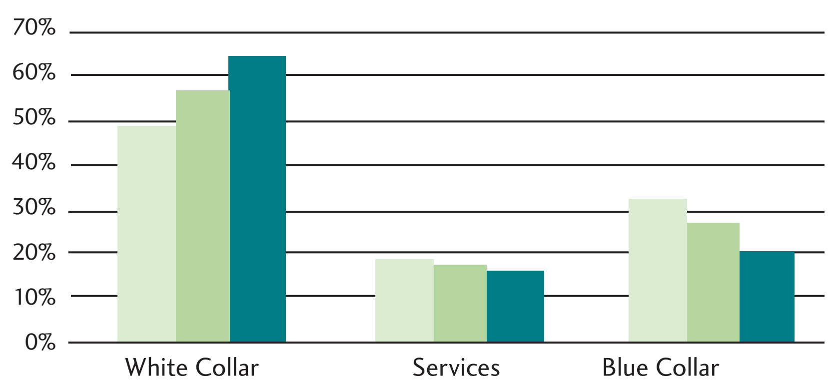
Findings:

- The neighborhood and community trade areas are projected to experience slightly lower population growth than the City between 2005 and 2030.
- However, with a projected growth rate of 47 percent, the neighborhood trade area is anticipated to experience higher employment growth than the City but lower employment growth than the community trade area between 2005 and 2030.
- The growth projections for household growth and employment growth vary significantly. For example, while households in the neighborhood trade area are expected to grow by 25 percent between 2005 and 2030, employment in the neighborhood is expected to increase by 47 percent during the same time period.

Occupation of Area Residents

For many retailers, the concentration of white or blue collar workers is one of several factors that may influence their decision to open a new store or expand an existing facility in a given location. For example, second hand clothing stores, discount grocery and merchandise stores and used car dealerships tend to be successful in areas with a higher concentration of blue collar or service workers. As shown in Figure 6, 49 percent of the workers in the neighborhood trade area are white collar workers and 51 percent are either services or blue collar workers. Given this even distribution, businesses that offer a broad mix of goods and services consumed by white collar professionals are just as likely to thrive in the neighborhood trade area as discount store or used merchandise store seeking to locate in Portland. The Division Corridor neighborhood trade area provides opportunities for business that target white collar workers as well as services and blue collar workers.

Figure 6: 2005 Employed Population 16+ by Occupation



	White Collar	Services	Blue Collar
Neighborhood Trade Area	49%	19%	32%
Community Trade Area	56%	17%	27%
Portland	64%	16%	20%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI 2007 estimates.

Findings:

- Compared to the City, the neighborhood has almost half (49 percent) white collar and slightly over half (51 percent) in services and blue-collar workers. The city as a whole is comprised of 64 percent white collar and 36 percent services and blue collar workers.
- Relative to the neighborhood trade area, the community trade area's employed population more closely resembles the Citywide employed population.

Housing Units and Homeownership

Identifying the breakdown of owner versus rental households in a given area is important because tenure can influence the demand for certain retail goods and services. For example, homeowners tend to allocate a greater share of their disposable income to home furnishings and home equipment than renters. Home improvement and garden centers as well as furniture stores, hardware and appliance stores and retailers that sell paint, wallpaper, floor coverings and other home products generally prosper in high owner-occupied housing markets.

Table 10: Housing Characteristics

	Neighborhood Trade Area			Community Trade Area			Portland		
	2000	2007	2012	2000	2007	2012	2000	2007	2012
Total Housing Units	27,410	30,439	32,180	116,021	124,732	130,135	237,307	253,528	263,909
Occupancy Rate	94.5%	93.0%	92.1%	94.7%	93.3%	92.5%	94.3%	92.6%	91.6%
Vacancy Rate	55.6%	57.0%	55.9%	55.9%	57.5%	56.6%	52.6%	53.6%	52.6%
Homeownership Rate	5.5%	7.0%	7.9%	5.3%	6.7%	7.5%	5.7%	7.4%	8.4%
Median Home Value	$136,313	$245,102	$290,886	$145,617	$265,085	$319,917	$154,721	$281,126	$343,396

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI 2007 population estimate and 2012 population forecast.

Findings:

- The homeownership rate in the neighborhood and community trade areas is consistently higher than that of the City of Portland.
- In all three trade areas, the homeownership rate is only expected to decrease by approximately 1 percent between 2007 and 2012.

Age

The age distribution of the market area population can help determine the right business mix for a commercial corridor because spending patterns vary among different age groups. For example, personal expenditures change as an individual ages. Drug stores and assisted care services flourish in areas with a large elderly population. Clothing stores and fast food establishments thrive in retail areas that contain a large concentration of adolescents.

Table 11 shows the age distribution of the neighborhood and community trade area and City populations as reported in the 2000 Census. It also shows the estimated and projected age distributions for 2007 and 2012.

Table 11: Population By Age

	Neighborhood Trade Area			Community Trade Area			Portland		
Age Group	2000	2007	2012	2000	2007	2012	2000	2007	2012
0 - 19	29.8%	28.9%	28.1%	27.1%	26.5%	25.7%	23.8%	23.0%	22.2%
20 - 34	21.9%	21.8%	22.8%	23.4%	22.1%	22.2%	25.9%	23.9%	23.3%
35 - 64	35.9%	37.5%	37.4%	37.3%	39.8%	40.2%	38.8%	42.0%	43.0%
65+	12.5%	11.7%	11.6%	12.3%	11.6%	12.0%	11.5%	11.0%	11.5%
Median Age	33.9	34.4	34.4	34.8	36.0	36.6	35.2	36.9	38.0

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI 2007 population estimate and 2012 population forecast.

Findings:

- In 2000, the neighborhood trade area had a higher percentage of young people (ages 0 – 19) than the community trade area and the Citywide population. This trend is projected to continue through 2012.
- In general, the neighborhood and community trade areas have a similar age distribution. In both areas, the largest group are those at 35-64 years of age, followed by those at 0-19, then by those at 20-34. The largest group for the Citywide population is also the 35-64 group, but the second largest group is the 20-34 group, followed by the 0-19 group. The 65+ group is consistently the smallest age group from 2000 through 2012 for all three trade areas.
- The neighborhood trade area's median age is less than that of the community trade area. The community trade area's median age is less than that of the City. The rate of change in median age is projected to be slower in the neighborhood trade area than the community trade area and the City. Between 2000 and 2012, the median age for the neighborhood trade area is projected to increase by 0.5 year while the median age for the community trade area is expected to increase by two years and the City by three years

Household Income

Household income is a good indicator of residents' spending power. When making location decisions, retailers may consider the median household income in a trade area or seek a minimum of households within a certain income range. For example, dollar stores and other discount retailers are more likely to locate in lower income neighborhoods than boutique clothing stores and other high-end retailers that cater to more affluent households.

Table 12 shows the estimated distribution of total households by household income in 2007 for the neighborhood and community trade areas and the City of Portland.

Table 12: Total Households by Household Income

	Neighborhood Trade Area		Community Trade Area		Portland	
ESRI 2005 Estimate	Number	Percent	Number	Percent	Number	Percent
Household Income Base	28,306	100%	116,404	100%	234,726	100%
< $15,000	3,012	10.6%	11,928	10.2%	28,211	12.0%
$15,000 - $24,999	2,672	9.4%	10,416	8.9%	21,078	9.0%
$25,000 - $34,999	3,553	12.6%	13,297	11.4%	25,692	10.9%
$35,000 - $49,999	5,061	17.9%	19,930	17.1%	36,819	15.7%
$50,000 - $74,999	6,464	22.8%	25,492	21.9%	46,790	19.9%
$75,000 - $99,999	4,191	14.8%	17,598	15.1%	33,103	14.1%
$100,000 - $149,999	2,418	8.5%	11,978	10.3%	24,624	10.5%
$150,000 - $199,999	640	2.3%	3,706	3.2%	10,377	4.4%
$200,000+	295	1.0%	2,059	1.8%	8,032	3.4%
Median Household Income	$58,798		$64,189		$69,766	
Average Household Income	$49,510		$51,921		$52,206	
Per Capita Income	$21,648		$24,953		$30,228	

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing, ESRI 2007 population estimate.

Findings:

- In 2007, the neighborhood and community trade areas had a greater percentage of middle-class households earning $35,000 to $99,999 than the City of Portland.
- At 20 percent and 19 percent, the percentage of low-income households in the neighborhood and community trade areas earning less than $25,000 was slightly lower than the Citywide share of low-income households (21 percent).
- The neighborhood trade area has a significantly lower per capita income than the community and city trade areas.

Education

For some retailers, educational attainment is an important indicator of the consumer demand for certain convenience and comparison shopping goods. For example, some specialty grocers, such as Trader Joe's, choose to locate in areas with the criterion of high education attainment alone; while others make this decision based on disposable income alone. Given that the percentage of the neighborhood population with a four-year degree is low compared to the City, retailers that cater to consumers with higher levels of educational attainment may be less likely to locate there.

Table 12: Educational Attainment, 2000

Educational Attainment	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total	45,047	100%	188,175	100%	363,851	100%
Less than 9th Grade	3,452	7.7%	12,574	6.7%	18,744	5.2%
9th - 12th Grade, No Diploma	6,295	14.0%	21,755	11.6%	33,382	9.2%
High School Graduate	14,777	32.8%	52,000	27.6%	80,947	22.2%
Some College, No Degree	11,879	26.4%	50,757	27.0%	90,825	25.0%
Associate Degree	2,777	6.2%	11,891	6.3%	21,255	5.8%
Bachelor's Degree	4,248	9.4%	27,494	14.6%	77,321	21.3%
Master's/Professional/Doctorate	1,619	3.6%	11,704	6.2%	41,377	11.4%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing,

Findings:

- The neighborhood trade area has a higher percentage of the population over age 25 who have not earned a high school diploma (22 percent) than both the community trade area (18 percent) and the City of Portland (14 percent).
- Advanced degrees are far less common in the neighborhood trade area, where 4 percent of residents have earned a Master's, Professional, or Doctorate Degree, compared with 6 percent of the Community Trade Area population and 11 percent of the Portland population.
- Only 13 percent of the neighborhood population earned a Bachelor's Degree or higher, compared to 21 percent of the community trade area and 33 percent of the Citywide population.

Race and Ethnicity

Racial and ethnic distributions also impact consumer spending and business development. In recent years, for example, as the Asian American and Russian population in nearby neighborhoods has grown, the Corridor has witnessed an increase in the number of ethnic markets and businesses oriented towards these ethnic groups.

Table 13: Race and Ethnicity, 2007

Race or Ethnicity	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total Population	78,031	100%	303,156	100%	551,301	100%
White Alone	58,679	75.2%	229,186	75.6%	412,373	74.8%
Black or African American Alone	2,107	2.7%	8,792	2.9%	38,591	7.0%
American Indian Alone	780	1.0%	2,728	0.9%	5,513	1.0%
Asian or Pacific Islander Alone	7,335	9.4%	29,709	9.8%	44,655	8.1%
Some Other Race Alone	5,540	7.1%	19,402	6.4%	25,911	4.7%
Two or More Races	3,511	4.5%	13,339	4.4%	24,257	4.4%
Hispanic Origin	9,598	12.3%	33,953	11.2%	49,617	9.0%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Findings:

- The neighborhood trade area population is largely White (75 percent). However, it boasts a growing Hispanic/Latino (12 percent) and Asian and Pacific Islander (9 percent) population.
- The neighborhood trade area has a higher percentage of the population that are of Hispanic/Latino origin (12 percent) compared to the community trade area (11 percent) and the City (9 percent). Similarly, the Asian and Pacific Islander population is growing at the neighborhood and community trade areas (9 to 10 percent).

Business Environment

From a public perspective, crime and safety, while distinct from one another, are often viewed synonymously. The look and feel of a place, including the level of maintenance, lighting conditions, and the amount and types of business and street activity, can significantly influence public attitudes and opinions. A feeling of safety is important to the success and vibrancy of an area, and regardless of whether or not a high level of crime actually exists, the perception of crime can greatly impact an area. For example, businesses may be less likely to locate in an area due to safety concerns for employees and customers. Similarly, nearby residents are often less likely to walk to or patronize local businesses if they feel unsafe. To improve public perceptions, basic streetscape, infrastructure and building and storefront improvements can be made to increase the overall appearance and feeling of safety.

BUSINESS AND CUSTOMER PERCEPTIONS

The majority of business owners surveyed along the Corridor felt that the three most important factors for the vitality of the corridor were safe roads, parking availability, and safe pedestrian environment. While these three factors were ranked the highest, business owners also felt that the two factors of attractive and visible signage, and maintained buildings, are very important in attracting more customers to the corridor. Relatively few business owners ranked any of the characteristics listed in the survey as unimportant or very unimportant in attracting customers to the corridor. Nevertheless, the survey responses indicate that availability of multi-cultural businesses/activities, variety of restaurants/entertainment options, and convenient shopping hours are less of a priority to the Corridor's businesses than the five aforementioned factors. Table 14 ranks the survey results in terms of the three most important factors and the three least important factors impacting the vitality of the Corridor. .

Table 14: Factors Impacting the Health and Vitality of the Corridor

Rank	Most Important	Least Important
1	Safe Roads	Multi-cultural Business Activities
2	Parking Availability	Restaurant/Entertainment Options
3	Safe Pedestrian Environment	Shopping Hours

Businesses along the Corridor are highly auto-dependent. Convenience stores such as K.S. Food Market and Bora Bora night club rely on customers getting to their locations by car.

Forty-five percent of the business owner respondents rated the attractiveness and visibility of the signage and building appearances along the Corridor below average. Figures 7 and 8 show the percentage of businesses that desire storefront improvements (37 percent) and the percentage of businesses that would like to make interior improvements (36 percent). Both percentages show that a little over a third of the business owners desire improvements of some kind to their individual businesses. A storefront enhancement program could be an option to help the business owners who are interested in improving their stores, and in the process, encourage the revitalization of the Corridor.

Figure 7: Businesses that Desire Storefront Improvements

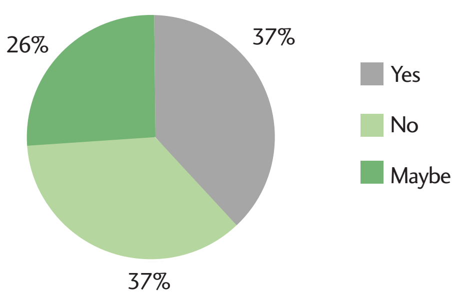
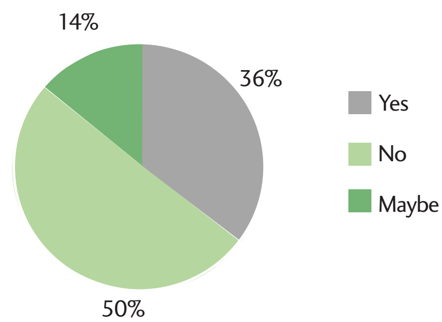


Figure 8: Businesses that Desire Interior Improvements



CRIME STATISTICS

Based on data from the Portland Police Bureau, Table 15 shows the number of crimes against persons and property as well as calls for service[5] that occurred within the City of Portland and Division Street between 2000 and 2005. For the purpose of analyzing crime trends, Division Street includes census tracts located within a quarter mile radius of the Corridor. When comparing crime and calls for service activity for Division Street to the city, it is important to keep in mind that Division Street is a major commercial thoroughfare, with higher employment and housing densities than some other parts of the city. In contrast, the City, which encompasses a much larger geographic area, features a much broader range of population, housing and employment densities.

[5] Calls for service includes two types of calls, dispatched calls and self-initiated calls, and do not necessarily result in an arrest. Dispatched calls refer to 9-1-1 calls that have come into the Bureau of Emergency Communications (BOEC) and for which an officer is dispatched to that incident. Self-initiated calls occur when an officer witnesses an incident while on patrol and responds (or someone stops the officer on the street and reports a problem).

Table 15: Total Crimes and Calls for Service

	82nd Avenue							Portland						
	2000	2001	2002	2003	2004	2005	% change 2000-05	2000	2001	2002	2003	2004	2005	% change 2000-05
CRIMES														
CRIMES AGAINST PERSONS														
Murder	4	3	0	2	2	1	-75%	18	22	20	28	29	22	22%
Rape	29	26	25	26	29	33	14%	369	305	354	310	313	325	-12%
Robbery	77	81	99	112	125	88	14%	1,455	1,272	1,296	1,375	1,291	1,139	-22%
Aggravated assault	309	307	273	275	290	279	-10%	3,864	2,963	2,844	2,732	2,405	2,376	-39%
Total Person Crimes	**419**	417	**397**	**415**	**446**	**401**	**-4%**	**5,706**	**4,562**	**4,514**	**4,445**	**4,038**	**3,862**	**-32%**
CRIMES AGAINST PROPERTY														
Burglary	519	528	524	617	738	682	31%	5,601	5,615	5,731	6,507	7,259	6,142	10%
Larceny	1,732	2,153	2,261	2,666	2,416	2,476	43%	25,063	28,457	28,052	29,748	28,452	25,941	4%
Motor vehicle theft	555	551	586	736	677	756	36%	4,782	4,765	5,255	5,982	6,052	5,834	22%
Arson	27	32	42	31	42	25	-7%	510	385	496	384	363	375	-26%
Total Property Crimes	**2,833**	**3,264**	**3,413**	**4,050**	**3,873**	**3,939**	**39%**	**35,956**	**39,222**	**39,534**	**42,621**	**42,126**	**38,292**	**6%**
Total Crimes	**3,252**	**3,681**	**3,810**	**4,465**	**4,319**	**4,340**	**33%**	**41,662**	**43,784**	**44,048**	**47,066**	**46,164**	**42,154**	**1%**
CALLS FOR SERVICE														
Dispatched	19,344	20,908	22,095	24,663	26,306	26,517	37%	230,740	243,861	248,865	262,670	259,661	244,335	6%
Self-initiated	9,232	9,885	11,330	12,858	12,493	17,185	86%	202,811	176,363	185,261	192,184	173,269	189,861	-6%
Total Calls for Service	**28,576**	**30,793**	**33,425**	**37,521**	**38,799**	**43,702**	**53%**	**433,551**	**420,224**	**434,126**	**454,854**	**432,930**	**434,196**	**0%**

Source: Portland Police Bureau, SQL Program 1/03/07
Division Street area totals calculated using census tracts 82.01,83.02,84,82.02,92.01,92.02,90,91.01,97.01,97.02, and 98.04. See Appendices D and E for detailed maps of Crime and Calls for Service on Division Street. See Appendices F and G for a detailed map of Crime and Calls for Service Citywide.

Findings:

- From 2000 to 2005, Division Street witnessed an increase of 33 percent in total crimes. In the same period, total crimes increased only 1 percent for the City. Total crimes on Division Street (4,465 crimes) and Citywide (47,066 crimes) both peaked in 2003 (during the recession). Most noticeably however, total crime at Division has remained roughly the same from 2003 to 2005, with only a slight decrease of 3 percent. Meanwhile, total crime Citywide fell 10 percent, with the second lowest level of crime in the six-year period in 2005.
- Between 2000 and 2005, crimes against persons on Division Street decreased by 4 percent overall, significantly less than the 32 percent decrease Citywide.
- Total property crimes on Division Street peaked in 2003 (4,050 crimes) then remained roughly the same in 2004 (3,873 crimes) and 2005 (3,939 crimes). In contrast, total property crimes for the City as a whole decreased from 42,621 crimes in 2003, to 42,126 crimes in 2004, then to 38,292 in 2005, with an three-year reduction of 10 percent. Within the property crime subgroups, there was a marked increase in burglary (31 percent), larceny (43 percent), and motor vehicle theft (36 percent) at Division from 2000 to 2005. The rate of increase for these crimes is markedly lower for the City which saw an increase of 10 percent in burglary, 4 percent in larceny, and 22 percent in motor vehicle theft in the same period.
- Total calls for service at Division rose 53 percent from 2000 to 2005 with the lion share of the increase coming from self-initiated calls which jumped 86 percent in the same period. Calls for service at Division are clearly much higher than the City which saw only a 0.15 percent change from 2000 to 2005 on a total-call basis with a slight increase in dispatched calls canceling out a slight decrease in self-initiated calls.
- Some business owners on Division observed that theft and vandalism around their store is so rampant that they are discouraged from investing in exterior storefront improvements.

Corridor Performance

Retail Gap Analysis

A retail gap analysis (or leakage analysis) is a technique for quantifying how well the current mix of retailers in an area, such as a commercial corridor, meets the consumer market demand of surrounding residents. The analysis estimates how many shoppers are coming to a commercial corridor to purchase retail goods and the extent to which the corridor is capturing the retail spending potential of households residing both inside and outside of the corridor's trade areas.

One of the few hobby train stores in Portland, Whistle Stop Trains, is located at the Corridor.

The loss of retail sales that occurs when people do not shop in the area where they live is generally referred to as retail (or market) "leakage." Conversely, a retail "surplus" exists if the actual retail sales within a corridor exceed the potential sales that could be generated by households living within the corridor's trade areas. In general, the gap analysis identifies specific industry sectors that are either thriving or underserved in the corridor. Excessive leakage represents an opportunity for future business development within the corridor. In some cases, a surplus indicates a specialty cluster of businesses on the corridor that draws customers from a larger trade area.

To identify the purchasing power of households within the Division Corridor's trade areas and compare their total spending potential to the capacity of existing retailers to accommodate consumer market demand, a gap analysis was completed using ESRI Business Analyst. As described above, retail leakage figures (shown as positive numbers) reflect industry sectors where a percentage of trade area households' spending potential is spent in competing retail corridors. Retail surplus figures (shown as negative numbers) indicate industry sectors capturing more than their proportionate share of the trade area's retail spending potential.

NEIGHBORHOOD TRADE AREA GAP ANALYSIS

Neighborhood retailers include businesses such as grocery stores, convenience stores, coffee shops, drug stores, dry cleaners, video rental stores, hair salons and local branches of banking/financial institutions, and other goods and services consumed and purchased on a frequent basis. Since ease of access is a primary consideration and consumers are generally unwilling to travel far for neighborhood goods and services, they are commonly referred to as "convenience purchases." They are also regarded as "essential purchases" since all households consume them, regardless of income. In urban areas and most suburban locations, neighborhood retailers serve small trade areas. Their customer base is comprised primarily of neighborhood residents and, to a lesser degree, local workers, who patronize their stores more exclusively.

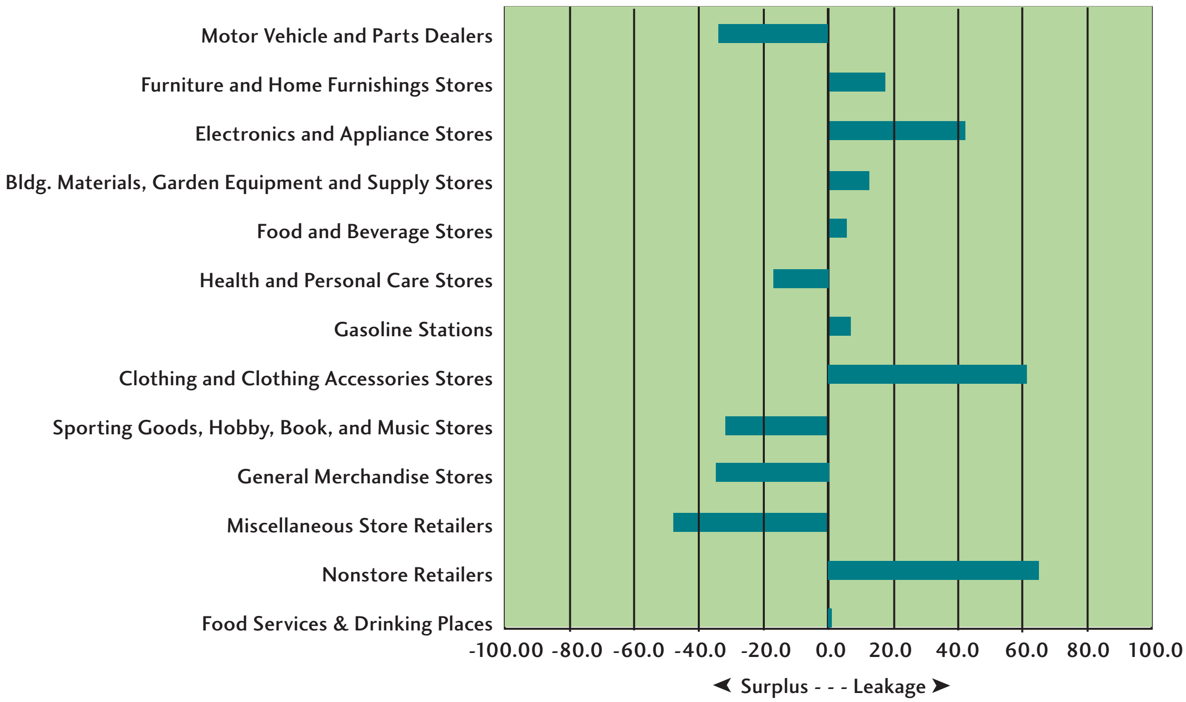
Table 16 calculates the overall leakage or surplus within the Retail Trade and Food and Drink industries. Figure 9 breaks down these aggregate amounts by industry sub sector.

Table 16: Retail Trade and Food & Drink Industry Summary

Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Leakage (+)/ Surplus (-) ($)	Leakage (+)/ Surplus (-) Factor[1]
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$845,890,826	$656,193,042	$-189,697,784	-12.6
Total Retail Trade (NAICS 44-45)	$757,478,860	$566,439,288	$-199,039,572	-14.4
Total Food & Drink (NAICS 722)	$88,411,966	$ 89,753,754	$ 1,341,788	0.8

Source: Business data provided by InfoUSA, Omaha NE, copyright 2007, all rights reserved. ESRI estimates for 2007.
[1]The Leakage/Surplus Factor is a measure of consumer demand relative to supply, ranging from 100 (total leakage) to -100 (total surplus).

Figure 9: Leakage/Surplus Factor by Industry Subsector



Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2005.

Findings:

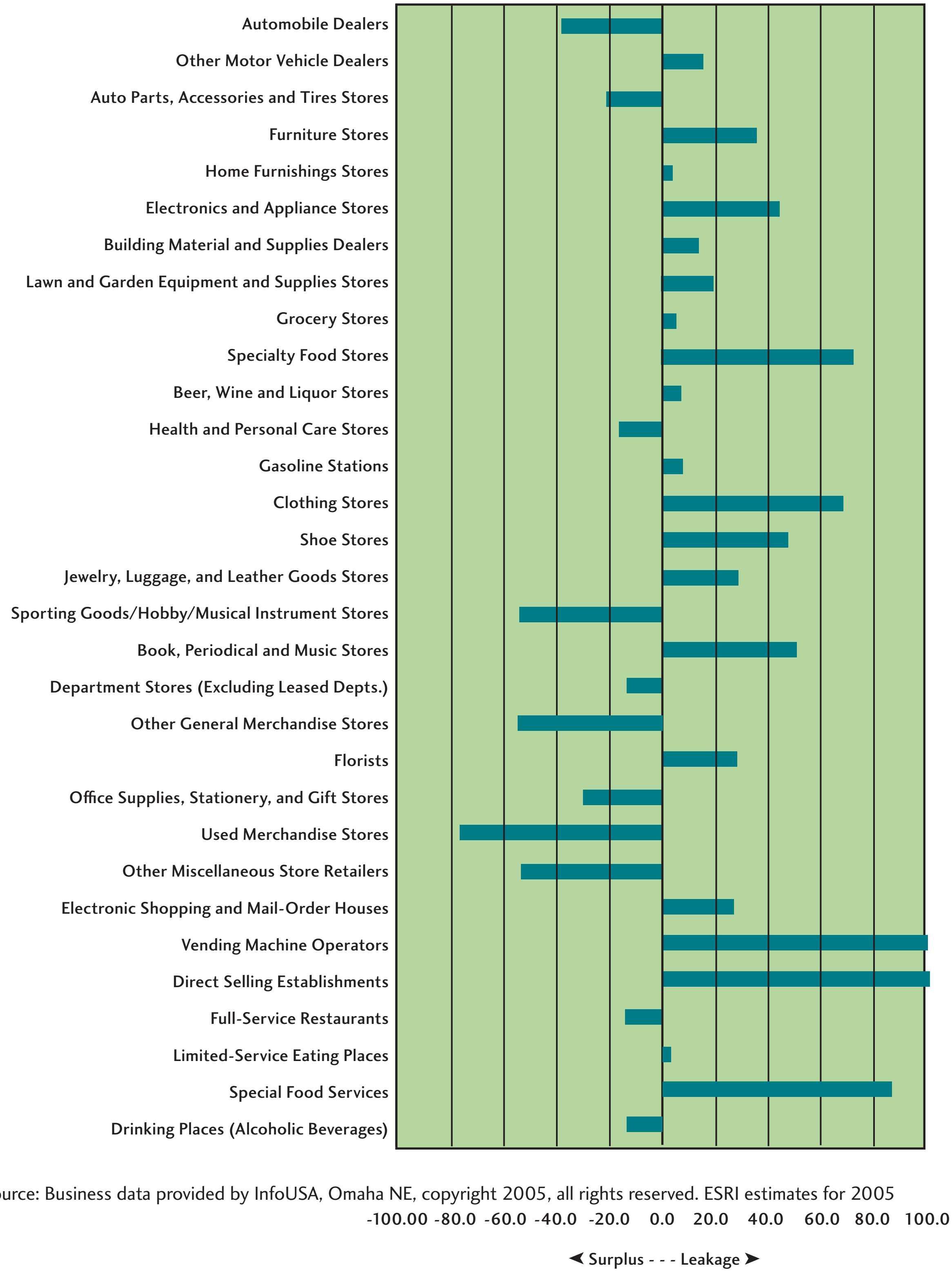
- No retail sales leakage is reported within the broader Retail Trade and Food and Drink industries (NAICS 44-45, 722). The analysis shows an overall surplus of $189,697,784, which is attributable to the Motor Vehicle and Parts Dealers, Health and Personal Care Stores, Sporting Goods, Hobby, Book and Music Stores, General Merchandise Stores, and Miscellaneous Store Retailers industry sub sectors (See Figure 9). The overall surplus suggests that most of the neighborhood's demands for certain types of goods and services are being met. It also suggests that businesses in the neighborhood trade area have a customer base that extends beyond the immediate neighborhood. Stores such as Fred Meyer along the corridor, and Target and Bed Bath & Beyond at the nearby Mall 205 on SE 96th Ave draw from a regional customer base. Since businesses in the Motor Vehicle and Parts Dealers industry sub sector deal in large-ticket items, the retail surplus that the Retail Trade industry sub sector may exert a significant influence on the overall retail gap.
- According to the neighborhood trade area gap analysis, industry sub sectors with retail leakage include Furniture and Home Furnishings Stores, Electronics and Appliance Stores, Building Materials, Garden Equipment and Supply Stores, Food and Beverage Stores, Gasoline Stations, Clothing and Clothing Accessories Stores, and Nonstore Retailers. The leakage factors for the Electronics and Appliance Stores, Clothing and Clothing Accessories Stores, and Nonstore Retailers sub sectors are significant. The Corridor may be able to accommodate one or more new businesses in these sub sectors. Specifically, the analysis indicates that the neighborhood trade area could support an additional $53 million in retail sales within these sub sectors, which commonly includes

stores that specialize in the sale of computers, cameras, household appliances, other electronic goods, new clothing, clothing accessories, as well as, nonstore retailers such as electronic shopping and mail-order houses.

- Eighty percent of business owners in the Division Corridor that completed the Bureau of Planning's Business Owner Survey reported that business has either improved or stayed the same during the time they have been in business. Of the 15 percent who reported a decline in business, changes in neighborhood characteristics such as the presence of drugs and gangs were the prime reasons mentioned.

Figure 10 provides a more detailed analysis of leakage/surplus by industry group. The industry groups are a subset of the broader industry sub sectors. For example, the Food Services and Drinking Places sub sector is composed of four industry groups – Drinking Places, Special Food Services, Limited Service Eating Places and Full Service Restaurants. Examining leakage/surplus patterns by industry group gives local businesses, residents and prospective investors a clearer picture of the types of businesses that are thriving or underrepresented.

Figure 10: Leakage/Surplus Factor by Industry Group



Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2005

Findings:

- The demand for neighborhood retail is not being met by existing businesses in many industry groups.
- Within the neighborhood trade area, the market potential for industry groups in the neighborhood trade area with the greatest retail sales leakage factor to the least is as follow: 100 for Direct Selling Establishments, 99 for Vending Machine Operators, 86 for Special Food Services, 71 for Specialty Food Stores, 68 for Clothing Stores, 51 for Book, Periodical and Music Stores, 47 for Shoe Stores, 44 for Electronics & Appliance Stores, 35 for Furniture Stores, 29 for Jewelry, Luggage, and Leather Goods Stores, 28 for Florists, 27 for Electronic Shopping and Mail-Order Houses, 19 for Lawn and Garden Equipment and Supplies Stores, 15 for Other Motor Vehicle Dealers, 14 for Building Material and Supplies Dealers, 8 for Gasoline Stations, 7 for Beer, Wine & Liquor Stores, 5 for Grocery Stores, 4 for Home Furnishings Stores, and 3 for Limited-Service Eating Places. Please note that some industry groups generally serve larger trade areas and are therefore discussed in the community trade area findings. The businesses typically not classified as neighborhood retailers are Building Materials and Supplies Dealers, Lawn and Garden Equipment and Supplies Dealers, Electronics and Appliance Stores, and Book, Periodical, and Music Stores.
- When asked to identify the top five businesses that would attract more customers to the corridor, 22 percent of business owners indicated an office supply store, 18 percent a bakery, 16 percent a bookstore, 15 percent a specialty food store, and 14 percent either a coffee shop or a health food store. The results of the business owner surveys generally support the findings of the neighborhood gap analysis. The primary difference between the surveys and the gap analysis is in the category of Office Supplies Stores. While the survey specifically separates out Office Supply Store from other businesses, Figure 10 aggregates office supply store with stationery and gift stores. The aggregated data is not only broader in terms of the scope of included businesses but also in terms of the geography which contains areas beyond the Division Corridor in the Neighborhood Trade Area. The business owner survey, therefore, gives a more detailed picture of the businesses that may be needed along the Corridor.

A detailed description of retail leakage/surplus by NAICS industry classifications can be found in Appendix H.

COMMUNITY TRADE AREA GAP ANALYSIS

Table 17 identifies leakage patterns within the Retail Trade and Food and Drink industries.

Table 17: Retail Trade and Food & Drink Industry Summary

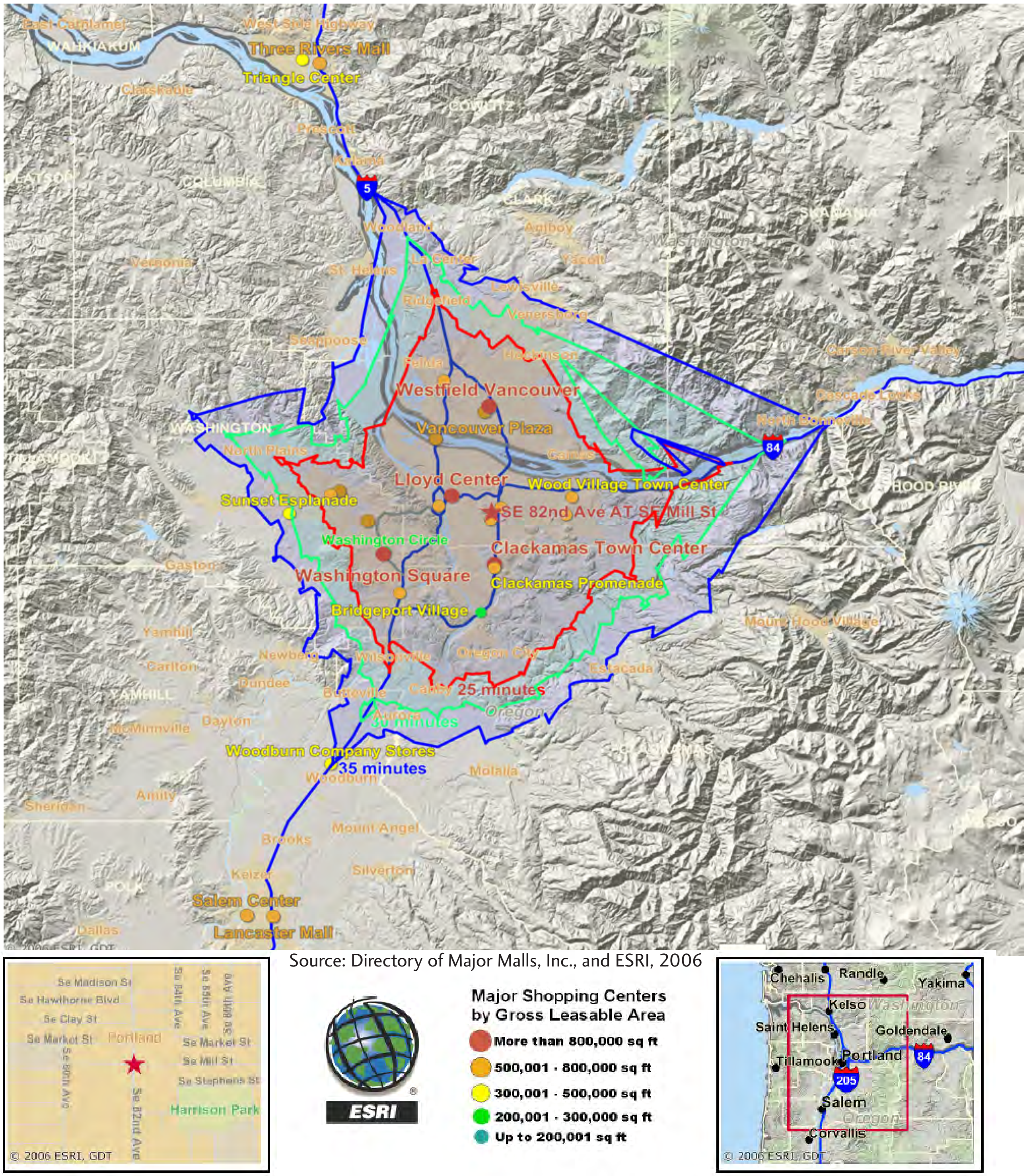
Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Leakage (+)/ Surplus (-) ($)	Leakage (+)/ Surplus (-)[1] Factor
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$ 3,209,820,356	$2,937,973,150	-$271,847,206	-4.4
Total Retail Trade (NAICS 44-45)	$ 2,729,140,516	$ 2,537,595,878	-$191,544,638	-3.6
Total Food & Drink (NAICS 722)	$ 480,679,840	$ 400,377,272	-$80,302,568	-9.1

Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2007.

Findings:

- No retail sales leakage is reported within the Retail Trade and Food and Drink industries (NAICS 44-45, 722) which generated an overall surplus of $271,847,206 in 2007. This suggests that the community trade area, which has nearly four times the number of households as the neighborhood trade area and contains an estimated 55 percent of the citywide population, is, overall, a stable retail marketplace.
- The community trade area features large format retailers, including but not limited to Home Depot, Circuit City, Bed Bath & Beyond and WinCo Foods. Most large format retailers are national and regional chains that offer a wider selection of retail goods than neighborhood retailers at a lower cost. For this reason, they have significantly larger trade areas comprised of multiple neighborhoods and municipalities.
- A map of major shopping centers within the Portland Metro region that may compete with the Corridor for customers is shown in Figure 11. All of the shopping centers are within a 25-minute drive time of the Division Corridor.

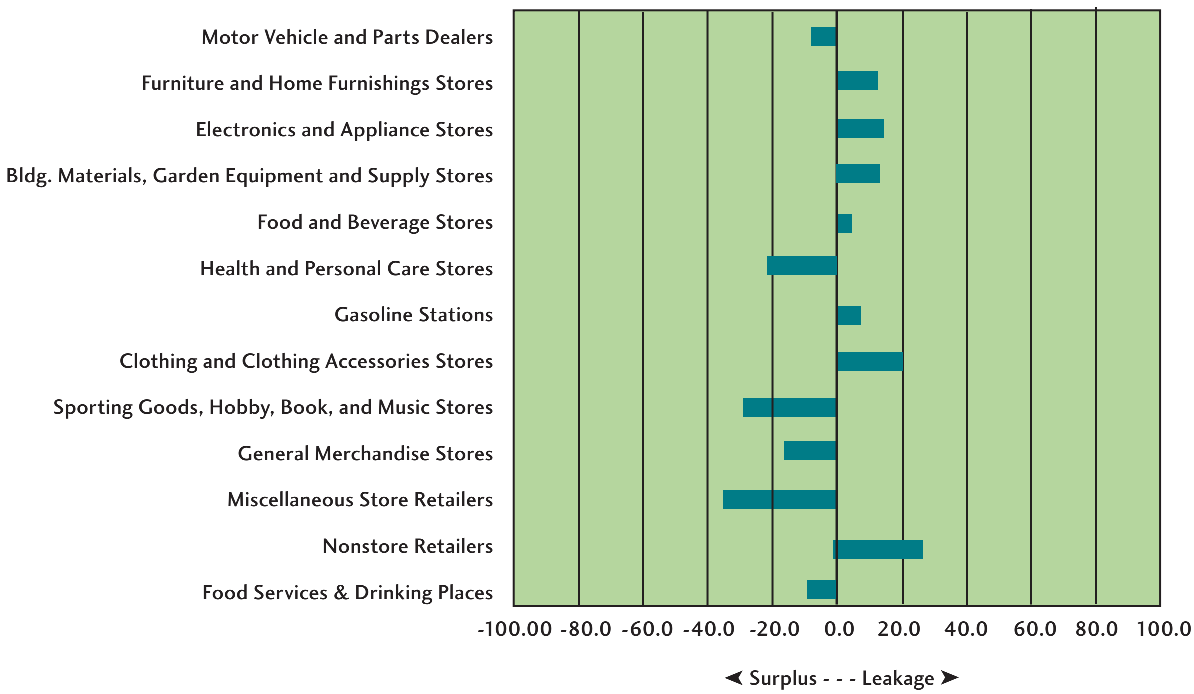
Figure 11: Major Shopping Centers in the Portland Metro Region



Source: Directory of Major Malls, Inc., and ESRI, 2006

Figure 12 shows retail leakage/surplus by industry sub sector. Figure 13 shows retail leakage/surplus by more detailed industry groups.

Figure 12: Leakage/Surplus Factor by Industry Subsector (Community Trade Area)

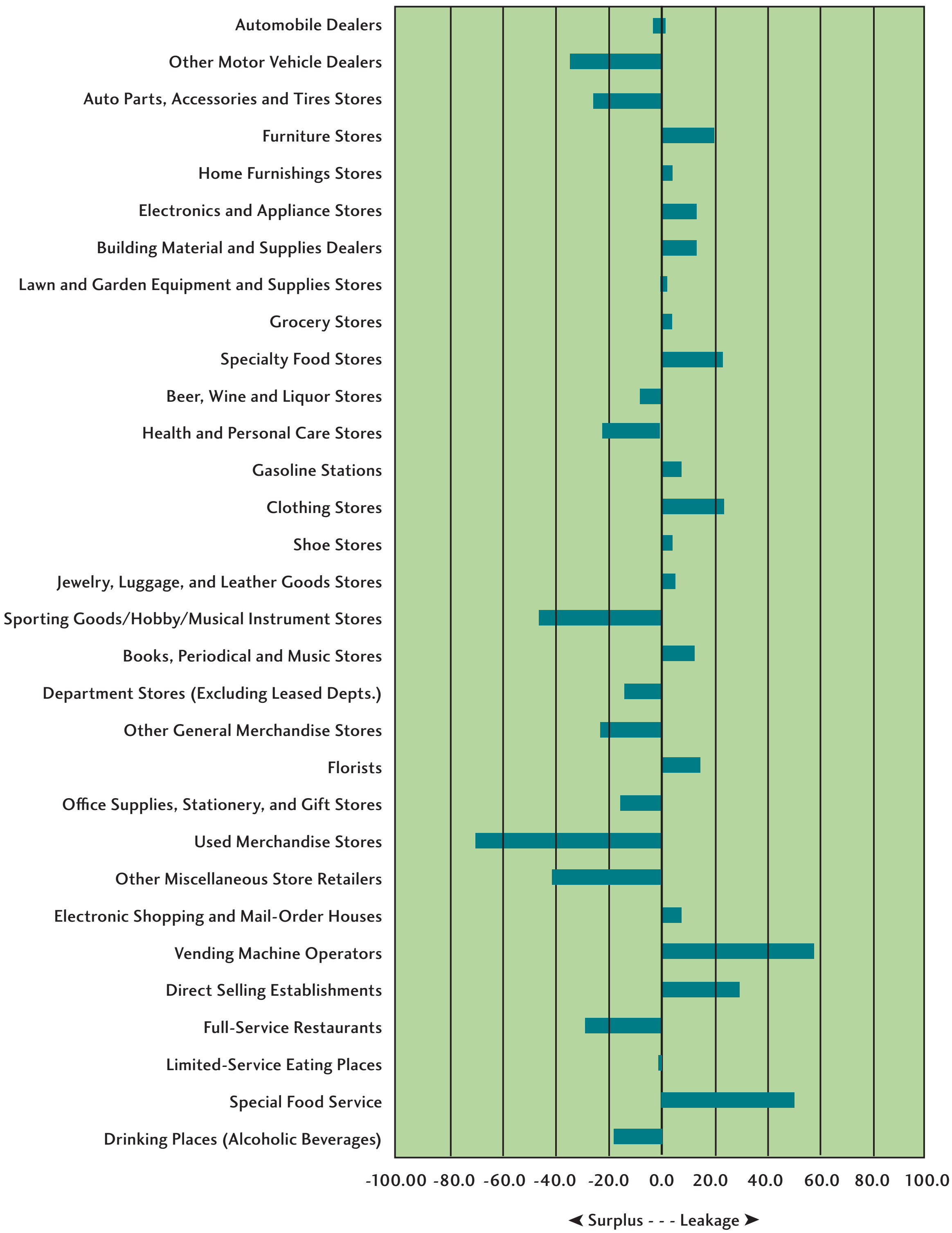


Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, All rights reserved. ESRI estimates for 2007.

Findings:

- In 2007, the Motor Vehicle & Parts Dealers, Health & Personal Care Stores, Sporting Goods, Hobby, Book, and Music Stores, General Merchandise Stores, Miscellaneous Store Retailers, and Food Services & Drinking Places industry sub sectors outperformed other sub sectors in the community trade area. These sub sectors generated a $499,035,722 retail surplus.
- While six industry sub sectors in the community trade area generated a retail surplus, seven sub sectors experienced a total retail leakage of $227,188,516. Accordingly, the area may be able to support new (or existing) businesses within the sub sectors of Furniture & Home Furnishings, Electronic & Appliance Stores, Bldg Materials, Garden Equip. & Supply Stores, Food & Beverage Stores, Gasoline Stations, Clothing and Clothing Accessories Stores, and Nonstore Retailers.
- As a whole, the trade gaps displayed in the community trade area, with the exception of the Food Services & Drinking Places industry sub sector is similar to that of the neighborhood trade area.

Figure 13: Leakage/Surplus Factor by Industry Group (Community Trade Area)



Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2005

Findings:

- Numerous industry groups experienced a retail surplus in 2005. The retail surplus factors for these industry groups are as follow: -69 for Used Merchandise Stores, -46 for Sporting Goods/Hobby/Musical Instrument Stores, -41 for Other Miscellaneous Store Retailers, -33 for Other Motor Vehicle Dealers, -28 for Full-Service Restaurants, -26 for Auto Parts, Accessories, and Tire Stores, -23 for Other General Merchandise Stores, -22 for Health & Personal Care Stores, -18 for Drinking Places (Alcoholic Beverages), -15 for Office Supplies, Stationery, and Gift Stores, -13 for Department Stores (Excluding Leased Depts.), -7 for Beer, Wine, and Liquor Stores, and -2 for Automobile Dealers.
- Existing businesses within the community trade area do not satisfy all consumer needs of area households. At a retail leakage factor of 58 and 51 respectively, Vending Machine Operators and Special Food Services are the two industry groups experiencing the greatest retail leakage in the Division community trade area. The retail leakage factors for the other industry groups are as follow: 30 for Direct Selling Establishments, 24 for Clothing Stores, 23 for Specialty Food Stores, 20 for Furniture Stores, 16 for Florists, 14 for Electronics & Appliances Stores, 14 for Building Material and Supplies Dealers, 13 for Book, Periodical, and Music Stores, 8 for Electronic Shopping and Mail-Order Houses, 8 for Gasoline Stations, 6 for Jewelry, Luggage, and Leather Goods Stores, 5 for Shoe Stores, 5 for Home Furnishings Stores, 4 for Grocery Stores, 3 for Lawn and Garden Equipment and Supplies Stores.

COMPETITIVE STRENGTHS AND WEAKNESSES

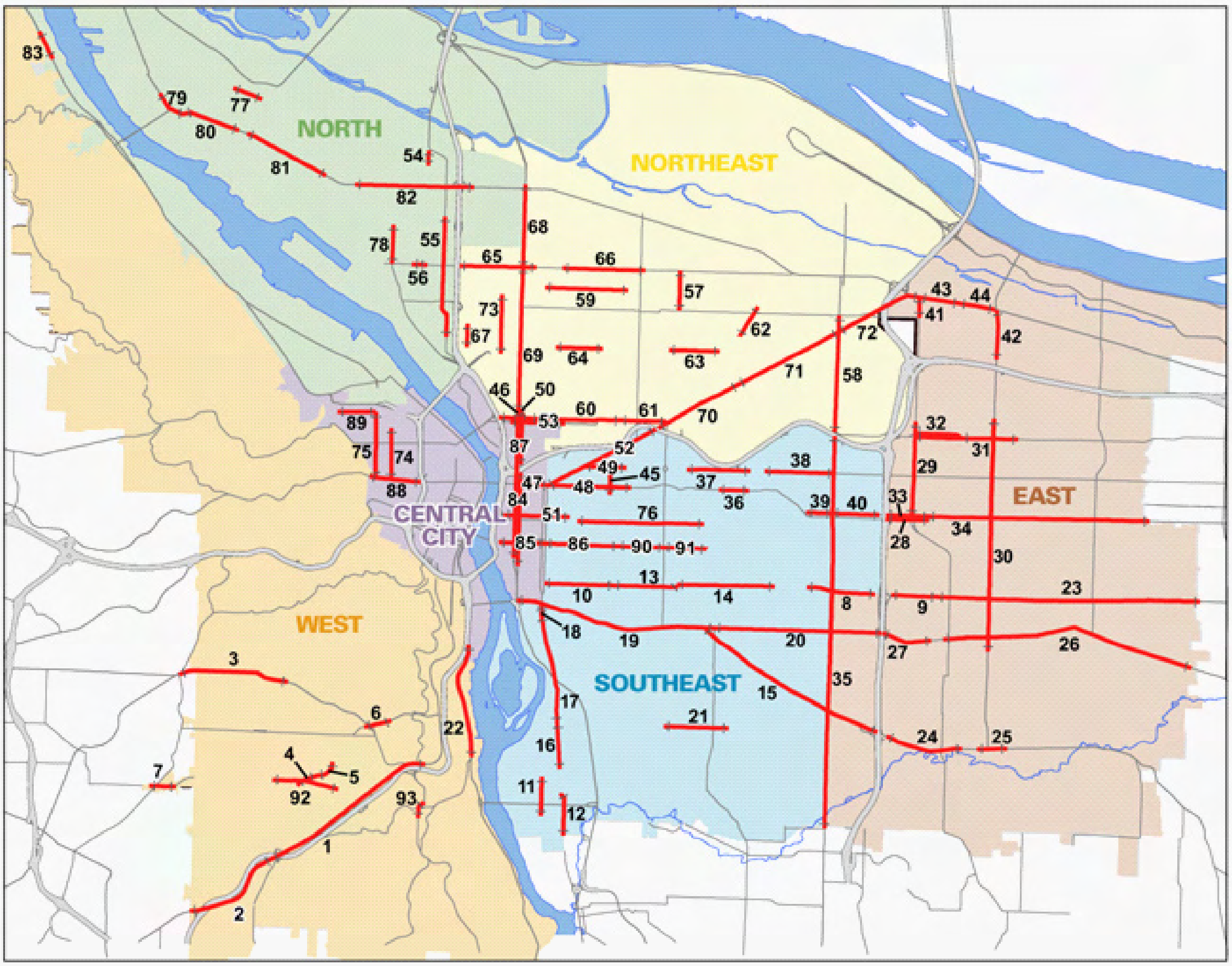
In addition to analyzing retail leakage, the overall performance of the Corridor was assessed in Figure 14 by identifying internal strengths and weaknesses as well as external market opportunities and threats (a conventional SWOT analysis).

Figure 14: Summary of Internal and External Factors Impacting Corridor Performance

	Strengths	Weaknesses
INTERNAL	• Several buildings and businesses remodeled • New residential development i.e. Carlwood • Redevelopment potential; vacant parcels and storefronts • High traffic volume and visibility • Commercial retail affordability • Active business associations • Variety of small businesses • Small, minority-owned businesses • Business owners are often local residents and leaders in the community • Long-term independent businesses that know history of corridor • Transportation options: multiple bus lines	• Crime and perception of "seediness" • Perceived low level of cleanliness • Unattractive storefronts and vandalism • Some vacant storefronts • Underutilized parcels • Incompatibility between some uses i.e. Portland Sand & Gravel Co. and Bike Gallery • Aesthetically unappealing and no street trees • Fast moving traffic • Auto-oriented, uninviting pedestrian environment • Dispersed commercial development • Many diverse businesses, but not all thriving • Transportation issues (pedestrian crossings) • Poorly maintained roads • Substandard residential housing • Possible lack of family wage jobs • Lacking entertainment options/culture • No "sense of place, identity, uniqueness, or specialization"
	Opportunities	**Threats**
EXTERNAL	• Employment growth • Within a reasonable distance of major roadways including I-205 • Proximity to PCC SE Center, could serve as a partner in community economic revitalization • Proximity to other corridors • Nodal development • Mixed-use redevelopment • Marketing, branding • Provide connection between residents from different social and economic background • Sign and Façade Program	• Perception of disproportionate low-income population • Lack of capital for redevelopment • Real estate market slow down • Competition from other nearby corridors • Competition from big box retailers • Limited business assistance resources • Development community more focused on central city area

Appendix A:

CITY OF PORTLAND 93 CORRIDORS MAP



1 SW Barbur 1
2 SW Barbur 2
3 SW B-H Hwy
4 SW Capitol 1
5 SW Capitol 2
6 SW Capitol 3
7 SW Garden Home
8 E Division 1
9 E Division 2
10 IE Division
11 SE 13th
12 SE 17th
13 SE Division 1
14 SE Division 2
15 SE Foster
16 SE Milwaukie 1
17 SE Milwaukie 2
18 SE Milwaukie 3
19 SE Powell 1
20 SE Powell 2
21 SE Woodstock
22 SW Macadam
23 E Division
24 E Foster 1
25 E Foster 2
26 E Powell 1
27 E Powell 2
28 E Washington
29 E 102nd
30 E 122nd
31 E Halsey
32 E Halsey-Weidler
33 E Stark
34 E Stark
35 SE 82nd
36 SE Burnside
37 SE Glisan 1
38 SE Glisan 2
39 SE Stark 1
40 SE Stark 2
41 E 102nd
42 E 122nd
43 E Sandy 1
44 E Sandy 2
45 IE 28th
46 IE Broadway
47 IE Burnside 1
48 IE Burnside 2
49 IE Glisan
50 IE Grand
51 IE Morrison
52 IE Sandy
53 IE Weidler
54 N Denver
55 N Interstate
56 N Killingsworth
57 NE 42nd
58 NE 82nd
59 NE Alberta
60 NE Broadway 1
61 NE Broadway 2
62 NE Cully
63 NE Fremont 1
64 NE Fremont 2
65 NE Killingsworth 1
66 NE Killingsworth 2
67 NE Mississippi
68 NE MLK 1
69 NE MLK 2
70 NE Sandy 1
71 NE Sandy 2
72 NE Sandy 3
73 NE Williams
74 NW 21st
75 NW 23rd
76 SE Belmont
77 N Fessenden
78 N Greeley
79 N Lombard 1
80 N Lombard 2
81 N Lombard 3
82 N Lombard 4
83 N St. Helens
84 IE Grand
85 IE Hawthorne 1
86 IE Hawthorne 2
87 IE MLK
88 NW Burnside
89 NW Thurman
90 SE Hawthorne 1
91 SE Hawthorne 2
92 SW Multnomah
93 SW Terwilliger

Appendix B:

BUSINESS LETTER AND SURVEY

CITY OF PORTLAND, OREGON
BUREAU OF Planning
Tom Potter, *Mayor*
Gil Kelley, *Director*
1900 S.W. 4th Ave., Ste. 4100
Portland, OR 97201-5380
Phone 503-823-7700
FAX 503-823-7800
TTY 503-823-6868
Email pdxplan@ci.portland.or.us
www.portlandonline.com/planning

October 2007

Dear Division Street Business Owner:

The City of Portland, Bureau of Planning is conducting a market study for Division Street from 110th Avenue to 162nd Avenue. The purpose of this study is to assess the economic vitality of this commercial corridor and identify opportunities for improvement. As part of the study, surveys are being distributed to area business owners during the month of October.

The attached survey will only take 5 minutes to complete. Individual responses will remain confidential and no personal/business names or information will be used in the final report. The final report will be made available to the public as a resource for business owners, business and neighborhood associations, real estate professionals, developers, and planners to better understand the characteristics of the corridor. Please complete the attached survey and fax it to 503-823-7800. Otherwise, the completed survey will be picked up from your place of business by Bureau of Planning staff within one-two weeks of delivery.

Thank you for taking the time to participate in this important research process. If you have any questions about the project, please contact me at 503-823-7801 or at aflores@ci.portland.or.us.

Sincerely,

Alma Flores
Economic Development Planner

CITY OF PORTLAND, OREGON
BUREAU OF
Planning

Tom Potter, *Mayor*
Gil Kelley, *Director*

1900 S.W. 4th Ave., Ste. 4100
Portland, OR 97201-5380

Phone 503-823-7700
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TTY 503-823-6868
Email pdxplan@ci.portland.or.us
www.portlandonline.com/planning

Octubre 2007

Querido Dueño de Negocio:

El Departamento de Planeficación de la ciudad de Portland está preparando un "Estudio de la Calle Division." El propósito del estudio es reconocer oportunidas y restriciones en el districto commercial e identificar servicios que faltaran en el districto comercial. Como parte del estudio, estamos distribuyendo este cuestionario durante el mes de Octubre.

Por favor toma 5 minutos para llenar el cuestionario. Las respuestas individuales serán mantenidas confidenciales y no se utilizará ningunos nombres personales ó información de negocio ó en el informe final.

Por favor de mandar el cuestionario por fax al 503-823-7800—Attención Alma Flores. Si no puede mandarlo por fax, personal del Departmento de Planificación vendra a recoger el cuestionario entre de 7 dias de la entrega.

Si usted tiene cualquiera pregunta, por favor llamame al 503-823-7801 ó por el email al aflores@ci.portland.or.us.

Sinceramente,

Alma Flores
Planificador Del Desarrollo Económico

Appendix B:

BUSINESS SURVEY

The City of Portland is conducting a market study of your commercial corridor. We would like your assistance in developing an accurate picture of the business climate. Please take a few minutes to complete this survey. If you have any questions, please contact Alma Flores at 503-823-7801 or aflores@ci.portland.or.us.

Date ___________________ **Corridor** _Division Street: 110th to 162nd_

Name of Business ____

Name of Business Owner____

Business Address ____

Which of the following categories best describes your business?
Retail ☐ Office ☐ Industrial ☐ Institutional (i.e., education, religious, charitable) ☐
Other ☐ (Please Describe) _________________________

How many years has your business been in operation? ______

How many years has your business operated along this corridor? ______

1. **Do you rent** ☐ **or own** ☐ **the business facility?**

2. **If you rent, what is your monthly rent?** ____________________

3. **What is the size of the business** (in square feet)**?** ____________

4. **Number of full-time employees** ______ **Number of part-time employees** ______
   Please include owner(s) who work at the business.

5. **Please rate the characteristics you feel are the most important in order to attract more customers to the corridor.**

Characteristics	Very Important	Important	Neutral	Unimportant	Very Unimportant
Convenient Shopping Hours	☐	☐	☐	☐	☐
Availability of Multi-Cultural Businesses/Activities	☐	☐	☐	☐	☐
Maintained Buildings	☐	☐	☐	☐	☐
Safe Pedestrian Environment	☐	☐	☐	☐	☐
Variety of Restaurants/Entertainment Options	☐	☐	☐	☐	☐
Attractive and Visible Signage	☐	☐	☐	☐	☐
Parking Availability	☐	☐	☐	☐	☐
Safe Roads	☐	☐	☐	☐	☐

6. **How satisfied are you with your present location?**

Satisfied ☐ Neutral ☐ Unsatisfied ☐ Plan to Move ☐

Please Explain. ____

7. **During the time you've been in business at this location, has business:**

Improved ☐ Stayed the Same ☐ Declined ☐ **Please explain.** ________________

8. **Do you have plans to expand, reduce or relocate your business in the future?**

☐ Expand: **Please explain.** ____
☐ Reduce: **Please explain.** ____

☐ Relocate: In Portland ☐ Out of Portland ☐ **Please explain.** ___________________
☐ None of the Above

9. Do you feel your *storefront* requires improvements to attract more customers?

Yes ☐ No ☐ Maybe ☐

9a. If yes or maybe, what improvements would you like to make?

New Paint ☐ Better Signage ☐ Awnings ☐ Remodel ☐ New Windows ☐
Other _____________________

10. Do you feel the *interior* of your business requires improvements to attract more customers?

Yes ☐ No ☐ Maybe ☐

10a. If yes or maybe, what improvements would you like to make?

Improved Access ☐ New Paint ☐ Enhanced Product Display ☐ Remodel ☐

Better Signage ☐ Improved Lighting ☐ Other ______________________

11. What changes have you seen since you first arrived in the neighborhood?

____

12. Please rate your corridor on the following criteria.

Characteristics	Very Good	Good	Neither Good nor Bad	Bad	Very Bad
Parking Availability	☐	☐	☐	☐	☐
Variety of Restaurants/Entertainment Options	☐	☐	☐	☐	☐
Attractive and Visible Signage	☐	☐	☐	☐	☐
Safe Pedestrian Environment	☐	☐	☐	☐	☐
Safe Roads	☐	☐	☐	☐	☐
Availability of Multi-Cultural Businesses/Activities	☐	☐	☐	☐	☐
Maintained Buildings	☐	☐	☐	☐	☐

13. From the following list of businesses, please choose the top FIVE you feel would attract more customers to the corridor. (Please review all options before making selections and rank your choices 1-5 with 1 being your first choice and 5 being your last choice.)

Toy Store	☐	Office Supply Store	☐	Retail Music Store	☐
Bike Shop	☐	Specialty Grocer	☐	Antique Store	☐
Florist	☐	Furniture Store	☐	Health Food Store	☐
Gift Store	☐	Hardware Store	☐	Dry Cleaner	☐
Ethnic Grocer	☐	Bakery	☐	Drug Store	☐
Garden Center	☐	Clothing/Shoe Store	☐	Bookstore	☐
Pet Supply Store	☐	Sporting Goods Store	☐	Hobby/Craft Store	☐
Print Shop	☐	Coffee Shop	☐	Other _____________	☐

Thank you for your time!
Please fax the completed survey to: 503-823-7800, Attn.: Alma or someone will be by to pick up your completed survey.

Appendix C:

DEMOGRAPHIC AND HOUSING DATA

Demographic and Income Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times			**Latitude:**	**45.504054**
SE Division St and SE 136th Ave			**Longitude:**	**-122.523656**
Portland, OR 97236	**Site Type:**	**Drivetime**	**Drivetime:**	**5 minutes**

Summary		**2000**		**2007**		**2012**
Population	71,084	71,080	78,031	78,031	81,936	81,933
Households		25,904	28,306	28,307		29,640
Families		17,276		18,711		19,366
Average Household Size		2.70		2.72		2.73
Owner Occupied HUs		15,248		17,361		17,975
Renter Occupied HUs		10,656		10,947		11,666
Median Age		33.9		34.4		34.4

Trends: 2007-2012 Annual Rate	**Area**	**State**	**National**
Population	0.98%	1.31%	1.22%
Households	0.92%	1.33%	1.27%
Families	0.69%	1.13%	1.00%
Owner HHs	0.70%	1.29%	1.29%
Median Household Income	3.76%	3.34%	3.29%

	2000		**2007**		**2012**	
Households by Income	Number	Percent	Number	Percent	Number	Percent
< $15,000	3,953	15.3%	3,012	10.6%	2,500	8.4%
$15,000 - $24,999	3,819	14.7%	2,672	9.4%	2,340	7.9%
$25,000 - $34,999	4,148	16.0%	3,553	12.6%	2,727	9.2%
$35,000 - $49,999	5,026	19.4%	5,061	17.9%	4,582	15.5%
$50,000 - $74,999	5,725	22.1%	6,464	22.8%	6,840	23.1%
$75,000 - $99,999	2,092	8.1%	4,191	14.8%	4,012	13.5%
$100,000 - $149,999	872	3.4%	2,418	8.5%	4,654	15.7%
$150,000 - $199,999	155	0.6%	640	2.3%	1,197	4.0%
$200,000+	128	0.5%	295	1.0%	787	2.7%
Median Household Income	$37,753		$49,510		$59,545	
Average Household Income	$43,990		$58,798		$71,954	
Per Capita Income	$16,446		$21,648		$26,394	

	2000		**2007**		**2012**	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	5,657	8.0%	6,272	8.0%	6,677	8.1%
5 - 9	5,400	7.6%	5,595	7.2%	5,681	6.9%
10 - 14	5,109	7.2%	5,336	6.8%	5,380	6.6%
15 - 19	4,976	7.0%	5,420	6.9%	5,321	6.5%
20 - 24	4,954	7.0%	5,664	7.3%	6,154	7.5%
25 - 34	10,559	14.9%	11,349	14.5%	12,510	15.3%
35 - 44	11,154	15.7%	10,828	13.9%	10,189	12.4%
45 - 54	8,976	12.6%	11,085	14.2%	11,138	13.6%
55 - 64	5,393	7.6%	7,327	9.4%	9,357	11.4%
65 - 74	4,400	6.2%	4,228	5.4%	4,583	5.6%
75 - 84	3,361	4.7%	3,409	4.4%	3,220	3.9%
85+	1,145	1.6%	1,518	1.9%	1,726	2.1%

	2000		**2007**		**2012**	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	56,218	79.1%	58,710	75.2%	59,260	72.3%
Black Alone	1,756	2.5%	2,139	2.7%	2,372	2.9%
American Indian Alone	788	1.1%	817	1.0%	822	1.0%
Asian Alone	5,304	7.5%	7,066	9.1%	8,388	10.2%
Pacific Islander Alone	203	0.3%	255	0.3%	283	0.3%
Some Other Race Alone	3,810	5.4%	5,510	7.1%	6,942	8.5%
Two or More Races	3,001	4.2%	3,535	4.5%	3,866	4.7%
Hispanic Origin (Any Race)	6,657	9.4%	9,635	12.3%	12,101	14.8%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2007 and 2012.

 Phone: 800-795-7483 • www.esri.com/bao **1/3/2008**

Demographic and Income Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times			**Latitude:**	**45.504054**
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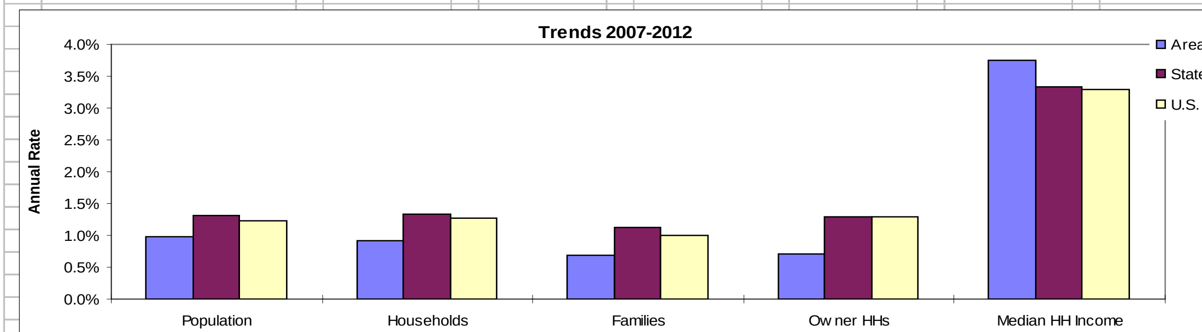
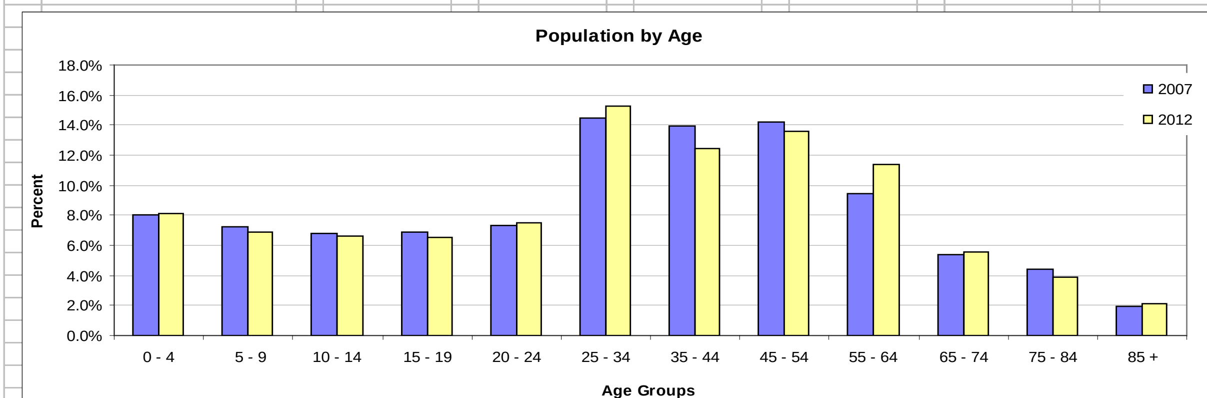
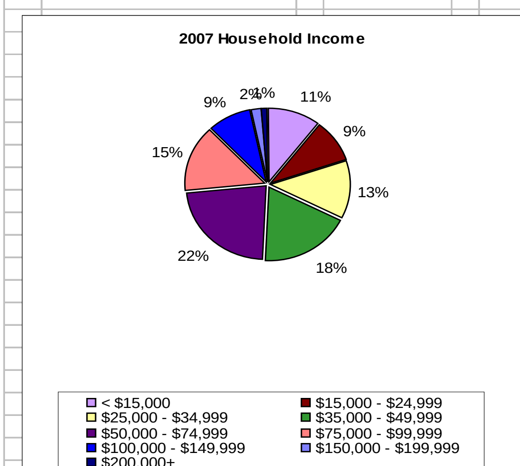
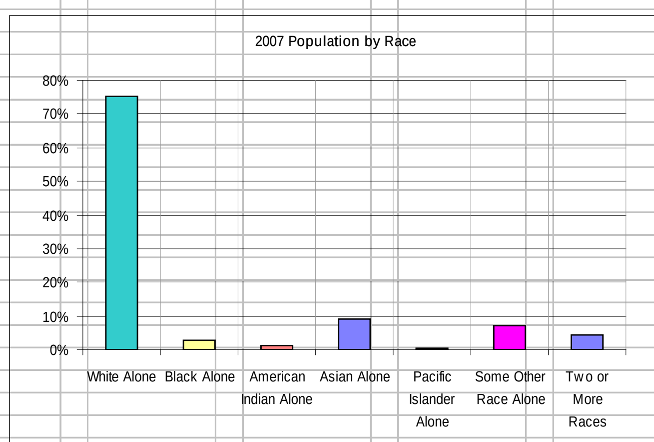








2007 Percent Hispanic Origin 12%

Source: ESRI forecasts for 2007 and 2012.

 Phone: 800-795-7483 • www.esri.com/bao **1/3/2008**

Demographic and Income Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times					**Latitude:**	**45.504054**
SE Division St and SE 136th Ave					**Longitude:**	**-122.523656**
Portland, OR 97236		**Site Type:**	**Drivetime**		**Drivetime:**	**10 minutes**
Summary		**2000**		**2007**		**2012**
Population		285,577		303,156		314,167
Households		109,916		116,404		120,370
Families		68,594		72,201		73,869
Average Household Size		2.55		2.56		2.56
Owner Occupied HUs		64,890		71,727		73,684
Renter Occupied HUs		45,026		44,677		46,686
Median Age		34.8		36.0		36.6
Trends: 2007-2012 Annual Rate		**Area**		**State**		**National**
Population		0.72%		1.31%		1.22%
Households		0.67%		1.33%		1.27%
Families		0.46%		1.13%		1.00%
Owner HHs		0.54%		1.29%		1.29%
Median Household Income		3.64%		3.34%		3.29%
	2000		**2007**		**2012**	
Households by Income	Number	Percent	Number	Percent	Number	Percent
< $15,000	15,855	14.4%	11,928	10.2%	9,872	8.2%
$15,000 - $24,999	14,912	13.5%	10,416	8.9%	9,086	7.5%
$25,000 - $34,999	16,346	14.9%	13,297	11.4%	10,018	8.3%
$35,000 - $49,999	20,817	18.9%	19,930	17.1%	17,444	14.5%
$50,000 - $74,999	23,742	21.6%	25,492	21.9%	26,695	22.2%
$75,000 - $99,999	10,606	9.6%	17,598	15.1%	16,540	13.7%
$100,000 - $149,999	5,631	5.1%	11,978	10.3%	19,892	16.5%
$150,000 - $199,999	1,083	1.0%	3,706	3.2%	6,139	5.1%
$200,000+	1,066	1.0%	2,059	1.8%	4,683	3.9%
Median Household Income	$40,135		$51,921		$62,086	
Average Household Income	$48,595		$64,189		$78,360	
Per Capita Income	$19,083		$24,953		$30,350	
	2000		**2007**		**2012**	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	20,446	7.2%	21,438	7.1%	22,459	7.1%
5 - 9	19,428	6.8%	19,942	6.6%	19,444	6.2%
10 - 14	18,525	6.5%	19,155	6.3%	19,485	6.2%
15 - 19	18,792	6.6%	19,581	6.5%	19,439	6.2%
20 - 24	20,526	7.2%	20,894	6.9%	22,784	7.3%
25 - 34	46,130	16.2%	46,134	15.2%	46,923	14.9%
35 - 44	45,672	16.0%	43,952	14.5%	42,798	13.6%
45 - 54	39,321	13.8%	45,471	15.0%	43,887	14.0%
55 - 64	21,472	7.5%	31,105	10.3%	39,435	12.6%
65 - 74	16,621	5.8%	15,872	5.2%	18,121	5.8%
75 - 84	13,716	4.8%	13,109	4.3%	12,169	3.9%
85+	4,929	1.7%	6,500	2.1%	7,224	2.3%
	2000		**2007**		**2012**	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	226,363	79.3%	229,178	75.6%	228,761	72.8%
Black Alone	7,595	2.7%	8,749	2.9%	9,478	3.0%
American Indian Alone	2,774	1.0%	2,806	0.9%	2,799	0.9%
Asian Alone	22,359	7.8%	28,674	9.5%	33,583	10.7%
Pacific Islander Alone	939	0.3%	1,111	0.4%	1,215	0.4%
Some Other Race Alone	13,793	4.8%	19,258	6.4%	23,845	7.6%
Two or More Races	11,755	4.1%	13,380	4.4%	14,486	4.6%
Hispanic Origin (Any Race)	24,322	8.5%	33,887	11.2%	41,828	13.3%

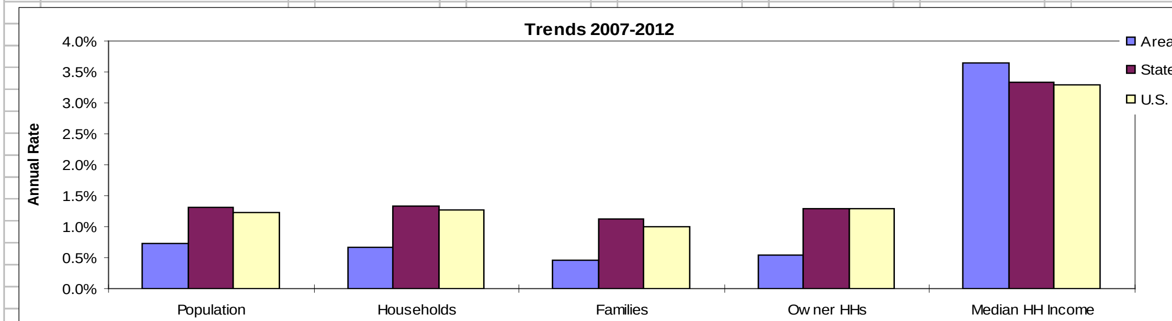
Data Note: Income is expressed in current dollars.

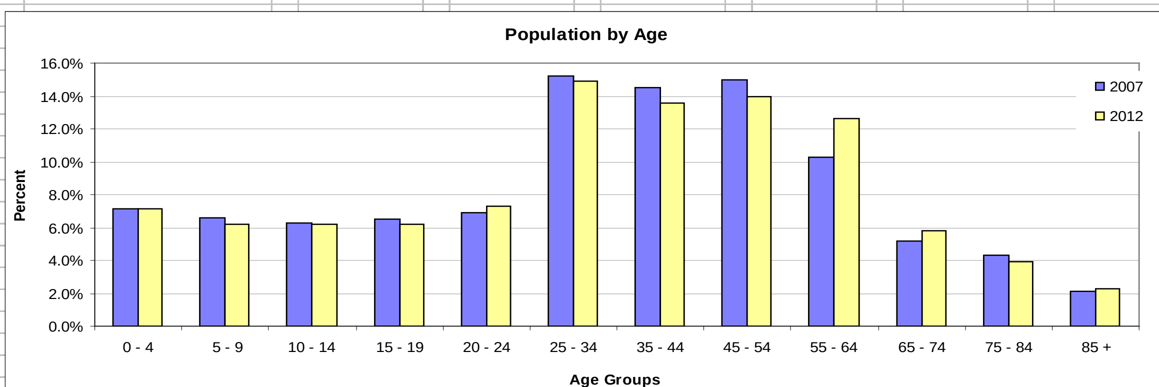
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2007 and 2012.

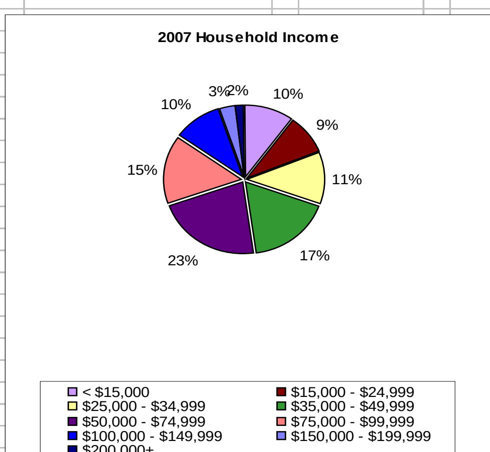
Demographic and Income Profile

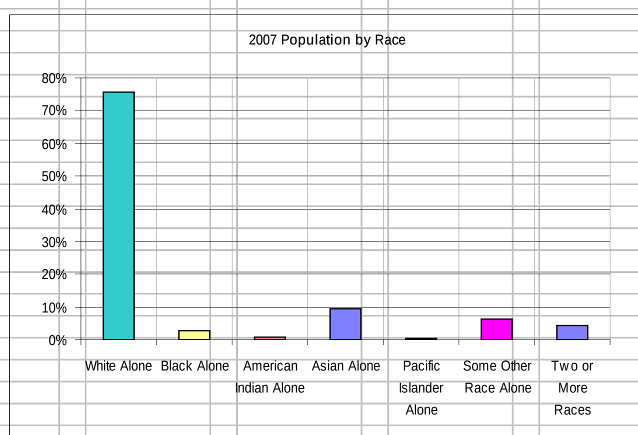
Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times			Latitude:	45.504054
SE Division St and SE 136th Ave			Longitude:	-122.523656
Portland, OR 97236	Site Type:	Drivetime	Drivetime:	10 minutes









2007 Percent Hispanic Origin 11%

Source: ESRI forecasts for 2007 and 2012.

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Housing Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times		Latitude:	45.504054
SE Division St and SE 136th Ave		Longitude:	-122.523656
Portland, OR 97236	Site Type: Drivetime	Drivetime:	5 minutes

2000 Total Population	71,080	2000 Median HH Income	$37,753
2007 Total Population	78,031	2007 Median HH Income	$49,510
2012 Total Population	81,933	2012 Median HH Income	$59,545
2007-2012 Annual Rate	0.98%	2007-2012 Annual Rate	3.76%

Housing Units by Occupancy Status and Tenure

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	27,410	100.0%	30,439	100.0%	32,180	100.0%
Occupied	25,904	94.5%	28,308	93.0%	29,641	92.1%
Owner	15,248	55.6%	17,361	57.0%	17,975	55.9%
Renter	10,656	38.9%	10,947	36.0%	11,666	36.3%
Vacant	1,506	5.5%	2,131	7.0%	2,539	7.9%

Owner Occupied Housing Units by Value

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total	15,203	100.0%	17,360	100.0%	17,975	100.0%
< $10,000	223	1.5%	150	0.9%	108	0.6%
$10,000 - $14,999	145	1.0%	104	0.6%	69	0.4%
$15,000 - $19,999	153	1.0%	81	0.5%	59	0.3%
$20,000 - $24,999	50	0.3%	103	0.6%	61	0.3%
$25,000 - $29,999	51	0.3%	86	0.5%	72	0.4%
$30,000 - $34,999	69	0.5%	94	0.5%	68	0.4%
$35,000 - $39,999	58	0.4%	53	0.3%	65	0.4%
$40,000 - $49,999	96	0.6%	65	0.4%	74	0.4%
$50,000 - $59,999	161	1.1%	84	0.5%	40	0.2%
$60,000 - $69,999	230	1.5%	76	0.4%	46	0.3%
$70,000 - $79,999	229	1.5%	78	0.4%	53	0.3%
$80,000 - $89,999	424	2.8%	67	0.4%	44	0.2%
$90,000 - $99,999	699	4.6%	136	0.8%	59	0.3%
$100,000 - $124,999	2,888	19.0%	370	2.1%	185	1.0%
$125,000 - $149,999	4,697	30.9%	483	2.8%	345	1.9%
$150,000 - $174,999	2,864	18.8%	804	4.6%	366	2.0%
$175,000 - $199,999	1,084	7.1%	1,546	8.9%	722	4.0%
$200,000 - $249,999	688	4.5%	4,767	27.5%	3,180	17.7%
$250,000 - $299,999	260	1.7%	4,606	26.5%	4,123	22.9%
$300,000 - $399,999	94	0.6%	2,750	15.8%	5,505	30.6%
$400,000 - $499,999	10	0.1%	598	3.4%	1,955	10.9%
$500,000 - $749,999	30	0.2%	227	1.3%	614	3.4%
$750,000 - $999,999	0	0.0%	12	0.1%	132	0.7%
$1,000,000 +	0	0.0%	20	0.1%	30	0.2%
Median Value	$136,313		$245,102		$290,886	
Average Value	$136,966		$249,246		$305,310	

Data Note: Detail may not sum to totals due to rounding.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2007 and 2012.

Housing Profile

Division 110-162: Drive times

Prepared by City of Portland, Bureau of Planning

SE Division St and SE 136th Ave		**Latitude:**	**45.504054**
Portland, OR 97236		**Longitude:**	**-122.523656**
Site Type:	**Drivetime**	**Drivetime:**	**5 minutes**

Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	1,506	100.0%
For Rent	860	57.1%
For Sale Only	352	23.4%
Rented/Sold, Unoccupied	99	6.6%
Seasonal/Recreational/Occasional Use	46	3.1%
For Migrant Workers	0	0.0%
Other Vacant	149	9.9%

Census 2000 Occupied Housing Units by Age of Householder and Home Ownership

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	25,906	15,251	58.9%
15 - 24	1,676	226	13.5%
25 - 34	4,751	1,814	38.2%
35 - 44	6,007	3,431	57.1%
45 - 54	5,173	3,493	67.5%
55 - 64	3,119	2,301	73.8%
65 - 74	2,623	2,046	78.0%
75 - 84	2,033	1,584	77.9%
85+	524	356	67.9%

Census 2000 Occupied Housing Units by Race/Ethnicity of Householder and Home Ownership

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	25,903	15,247	58.9%
White Alone	22,054	13,571	61.5%
Black Alone	582	125	21.5%
American Indian Alone	286	107	37.4%
Asian Alone	1,386	948	68.4%
Pacific Islander Alone	52	13	25.0%
Some Other Race Alone	823	182	22.1%
Two or More Races	720	301	41.8%
Hispanic Origin	1,486	391	26.3%

Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	27,405	100.0%	25,891	100.0%
1, Detached	16,365	59.7%	15,846	61.2%
1, Attached	871	3.2%	807	3.1%
2	974	3.6%	917	3.5%
3 to 4	1,681	6.1%	1,539	5.9%
5 to 9	1,449	5.3%	1,209	4.7%
10 to 19	1,445	5.3%	1,302	5.0%
20 to 49	1,866	6.8%	1,679	6.5%
50 or More	1,350	4.9%	1,271	4.9%
Mobile Home	1,350	4.9%	1,267	4.9%
Other	54	0.2%	54	0.2%

Data Note: Persons of Hispanic Origin may be of any race.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Housing Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times			Latitude:	45.504054
SE Division St and SE 136th Ave			Longitude:	-122.523656
Portland, OR 97236	Site Type:	Drivetime	Drivetime:	5 minutes

Census 2000 Specified Owner Occupied Housing Units by Selected Monthly Owner Costs

	Number	Percent
Total	13,168	100.0%
With Mortgage	9,854	74.8%
< $200	1	0.0%
$200 - $299	8	0.1%
$300 - $399	94	0.7%
$400 - $499	205	1.6%
$500 - $599	401	3.0%
$600 - $699	524	4.0%
$700 - $799	645	4.9%
$800 - $899	1,026	7.8%
$900 - $999	1,113	8.5%
$1000 - $1249	2,606	19.8%
$1250 - $1499	1,744	13.2%
$1500 - $1999	1,193	9.1%
$2000 - $2499	182	1.4%
$2500 - $2999	79	0.6%
$3000+	33	0.3%
With No Mortgage	3,314	25.2%
Median Monthly Owner Costs for Units with Mortgage	$1,087	
Average Monthly Owner Costs for Units with Mortgage	$1,131	

Census 2000 Specified Renter Occupied Housing Units by Contract Rent

	Number	Percent
Total	10,687	100.0%
Paying Cash Rent	10,422	97.5%
< $100	134	1.3%
$100 - $149	184	1.7%
$150 - $199	100	0.9%
$200 - $249	136	1.3%
$250 - $299	116	1.1%
$300 - $349	208	1.9%
$350 - $399	320	3.0%
$400 - $449	622	5.8%
$450 - $499	1,206	11.3%
$500 - $549	1,436	13.4%
$550 - $599	1,821	17.0%
$600 - $649	1,085	10.2%
$650 - $699	965	9.0%
$700 - $749	452	4.2%
$750 - $799	423	4.0%
$800 - $899	577	5.4%
$900 - $999	353	3.3%
$1000 - $1249	198	1.9%
$1250 - $1499	26	0.2%
$1500 - $1999	41	0.4%
$2000 +	19	0.2%
No Cash Rent	265	2.5%
Median Rent	$571	
Average Rent	$580	
Average Gross Rent (with Utilities)	$668	

Data Note: Specified Owner Occupied Housing Units exclude houses on 10+ acres, mobile homes, units in multiunit buildings, and houses with a business or medical office. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Contra

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Housing Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times		Latitude:	45.504054
SE Division St and SE 136th Ave		Longitude:	-122.523656
Portland, OR 97236	Site Type: Drivetime	Drivetime:	10 minutes

2000 Total Population	285,577	2000 Median HH Income	$40,135
2007 Total Population	303,156	2007 Median HH Income	$51,921
2012 Total Population	314,167	2012 Median HH Income	$62,086
2007-2012 Annual Rate	0.72%	2007-2012 Annual Rate	3.64%

Housing Units by Occupancy Status and Tenure

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	116,021	100.0%	124,732	100.0%	130,135	100.0%
Occupied	109,916	94.7%	116,404	93.3%	120,370	92.5%
Owner	64,890	55.9%	71,727	57.5%	73,684	56.6%
Renter	45,026	38.8%	44,677	35.8%	46,686	35.9%
Vacant	6,105	5.3%	8,328	6.7%	9,765	7.5%

Owner Occupied Housing Units by Value

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total	64,915	100.0%	71,728	100.0%	73,685	100.0%
< $10,000	508	0.8%	333	0.5%	223	0.3%
$10,000 - $14,999	354	0.5%	241	0.3%	158	0.2%
$15,000 - $19,999	339	0.5%	187	0.3%	135	0.2%
$20,000 - $24,999	100	0.2%	252	0.4%	143	0.2%
$25,000 - $29,999	102	0.2%	207	0.3%	175	0.2%
$30,000 - $34,999	124	0.2%	209	0.3%	163	0.2%
$35,000 - $39,999	111	0.2%	130	0.2%	150	0.2%
$40,000 - $49,999	296	0.5%	143	0.2%	169	0.2%
$50,000 - $59,999	442	0.7%	170	0.2%	94	0.1%
$60,000 - $69,999	615	0.9%	156	0.2%	100	0.1%
$70,000 - $79,999	880	1.4%	213	0.3%	109	0.1%
$80,000 - $89,999	1,467	2.3%	197	0.3%	105	0.1%
$90,000 - $99,999	2,807	4.3%	348	0.5%	164	0.2%
$100,000 - $124,999	11,244	17.3%	945	1.3%	468	0.6%
$125,000 - $149,999	15,847	24.4%	1,674	2.3%	847	1.1%
$150,000 - $174,999	12,266	18.9%	2,924	4.1%	1,194	1.6%
$175,000 - $199,999	7,160	11.0%	5,847	8.2%	2,500	3.4%
$200,000 - $249,999	5,660	8.7%	16,595	23.1%	11,451	15.5%
$250,000 - $299,999	2,620	4.0%	16,881	23.5%	14,187	19.3%
$300,000 - $399,999	1,371	2.1%	15,422	21.5%	21,627	29.4%
$400,000 - $499,999	290	0.4%	5,153	7.2%	11,353	15.4%
$500,000 - $749,999	214	0.3%	2,905	4.1%	5,847	7.9%
$750,000 - $999,999	36	0.1%	310	0.4%	1,790	2.4%
$1,000,000 +	62	0.1%	286	0.4%	533	0.7%
Median Value	$145,617		$265,085		$319,917	
Average Value	$156,948		$286,746		$352,193	

Data Note: Detail may not sum to totals due to rounding.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2007 and 2012.

Housing Profile

Division 110-162: Drive times		Prepared by City of Portland, Bureau of Planning	
		Latitude:	45.504054
SE Division St and SE 136th Ave		Longitude:	-122.523656
Portland, OR 97236	Site Type: Drivetime	Drivetime:	10 minutes

Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	6,104	100.0%
For Rent	3,057	50.1%
For Sale Only	1,490	24.4%
Rented/Sold, Unoccupied	499	8.2%
Seasonal/Recreational/Occasional Use	202	3.3%
For Migrant Workers	0	0.0%
Other Vacant	856	14.0%

Census 2000 Occupied Housing Units by Age of Householder and Home Ownership

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	109,916	64,890	59.0%
15 - 24	6,653	751	11.3%
25 - 34	21,055	8,158	38.7%
35 - 44	24,735	14,619	59.1%
45 - 54	23,018	15,972	69.4%
55 - 64	12,747	9,351	73.4%
65 - 74	10,135	7,800	77.0%
75 - 84	8,840	6,600	74.7%
85+	2,733	1,639	60.0%

Census 2000 Occupied Housing Units by Race/Ethnicity of Householder and Home Ownership

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	109,915	64,890	59.0%
White Alone	93,729	57,747	61.6%
Black Alone	2,641	670	25.4%
American Indian Alone	999	395	39.5%
Asian Alone	6,183	4,113	66.5%
Pacific Islander Alone	261	68	26.1%
Some Other Race Alone	3,109	691	22.2%
Two or More Races	2,993	1,206	40.3%
Hispanic Origin	5,638	1,510	26.8%

Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	116,030	100.0%	109,939	100.0%
1, Detached	73,757	63.6%	71,238	64.8%
1, Attached	3,418	2.9%	3,111	2.8%
2	4,553	3.9%	4,226	3.8%
3 to 4	6,502	5.6%	5,953	5.4%
5 to 9	5,956	5.1%	5,367	4.9%
10 to 19	6,327	5.5%	5,738	5.2%
20 to 49	6,086	5.2%	5,589	5.1%
50 or More	6,526	5.6%	6,067	5.5%
Mobile Home	2,714	2.3%	2,486	2.3%
Other	191	0.2%	164	0.1%

Data Note: Persons of Hispanic Origin may be of any race.
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Housing Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times		**Latitude:**	**45.504054**
SE Division St and SE 136th Ave		**Longitude:**	**-122.523656**
Portland, OR 97236	**Site Type: Drivetime**	**Drivetime:**	**10 minutes**

Census 2000 Specified Owner Occupied Housing Units by Selected Monthly Owner Costs

	Number	Percent
Total	58,892	100.0%
With Mortgage	44,182	75.0%
< $200	9	0.0%
$200 - $299	52	0.1%
$300 - $399	329	0.6%
$400 - $499	790	1.3%
$500 - $599	1,610	2.7%
$600 - $699	2,373	4.0%
$700 - $799	3,327	5.6%
$800 - $899	4,252	7.2%
$900 - $999	4,437	7.5%
$1000 - $1249	10,876	18.5%
$1250 - $1499	7,372	12.5%
$1500 - $1999	6,478	11.0%
$2000 - $2499	1,530	2.6%
$2500 - $2999	456	0.8%
$3000+	291	0.5%
With No Mortgage	14,710	25.0%
Median Monthly Owner Costs for Units with Mortgage	$1,113	
Average Monthly Owner Costs for Units with Mortgage	$1,179	

Census 2000 Specified Renter Occupied Housing Units by Contract Rent

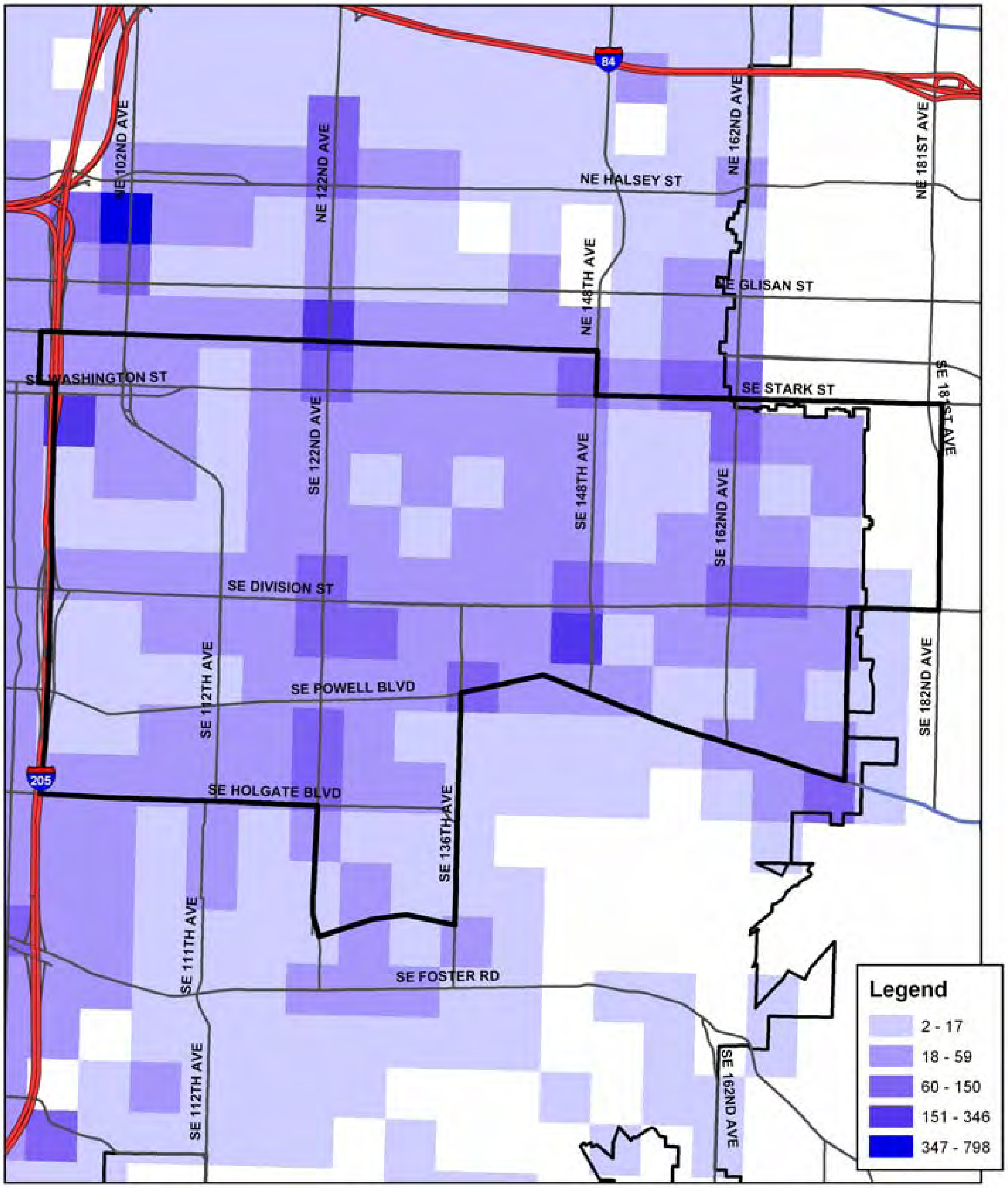
	Number	Percent
Total	45,016	100.0%
Paying Cash Rent	44,000	97.7%
< $100	594	1.3%
$100 - $149	790	1.8%
$150 - $199	480	1.1%
$200 - $249	547	1.2%
$250 - $299	568	1.3%
$300 - $349	850	1.9%
$350 - $399	1,410	3.1%
$400 - $449	2,603	5.8%
$450 - $499	4,372	9.7%
$500 - $549	6,414	14.2%
$550 - $599	6,693	14.9%
$600 - $649	4,544	10.1%
$650 - $699	4,120	9.2%
$700 - $749	2,288	5.1%
$750 - $799	1,879	4.2%
$800 - $899	2,493	5.5%
$900 - $999	1,378	3.1%
$1000 - $1249	1,198	2.7%
$1250 - $1499	414	0.9%
$1500 - $1999	276	0.6%
$2000 +	89	0.2%
No Cash Rent	1,016	2.3%
Median Rent	$575	
Average Rent	$593	
Average Gross Rent (with Utilities)	$678	

Data Note: Specified Owner Occupied Housing Units exclude houses on 10+ acres, mobile homes, units in multiunit buildings, and houses with a business or medical office. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Contra

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Appendix D:

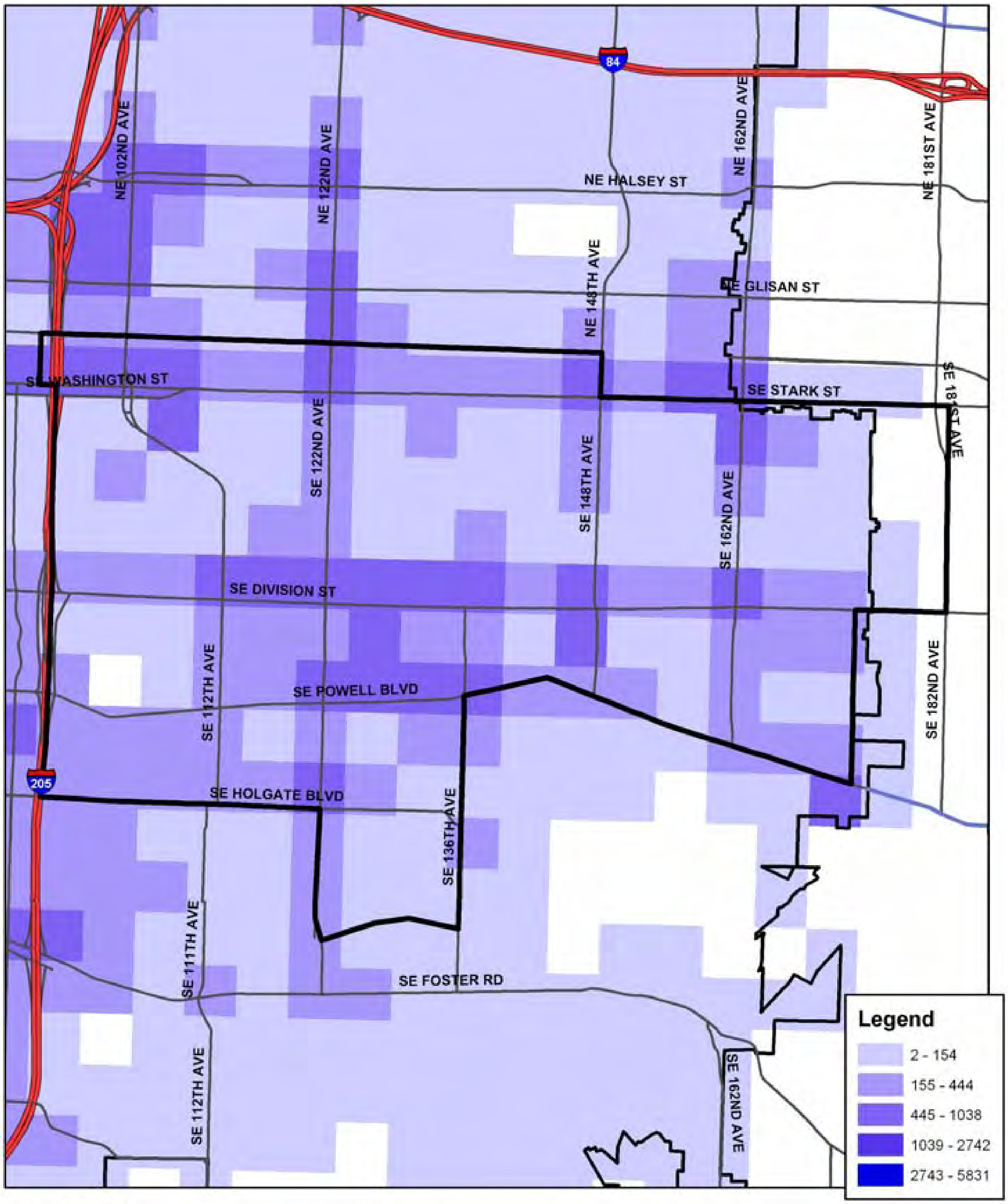
2005 DIVISION ST. CRIME DENSITY MAP 110th - 162nd



Portland Police Bureau
Data Source: SQL Program 1/03/07
Division Street area consists of census tracts 82.01, 83.02, 84, 82.02, 92.01, 90, 91.01, 92.02, 97.01, 97.02, and 98.04.
Overlay grid consists of quarter mile squares

Appendix E:

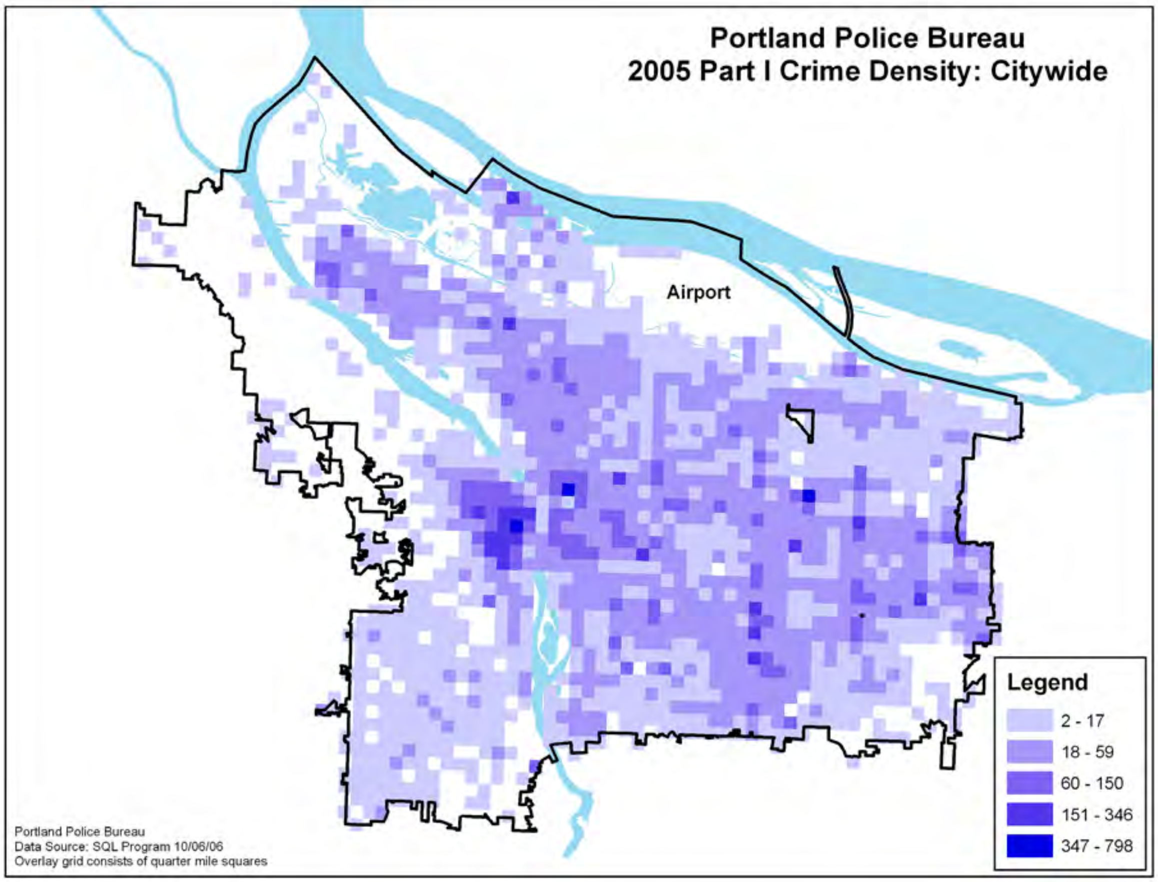
2005 DIVISION ST. CALLS FOR SERVICE MAP 110th - 162nd



Portland Police Bureau
Data Source: SQL Program 1/03/07
Division Street area consists of census tracts 82.01, 83.02, 84, 82.02, 92.01, 90, 91.01, 92.02, 97.01, 97.02, and 98.04.
Overlay grid consists of quarter mile squares

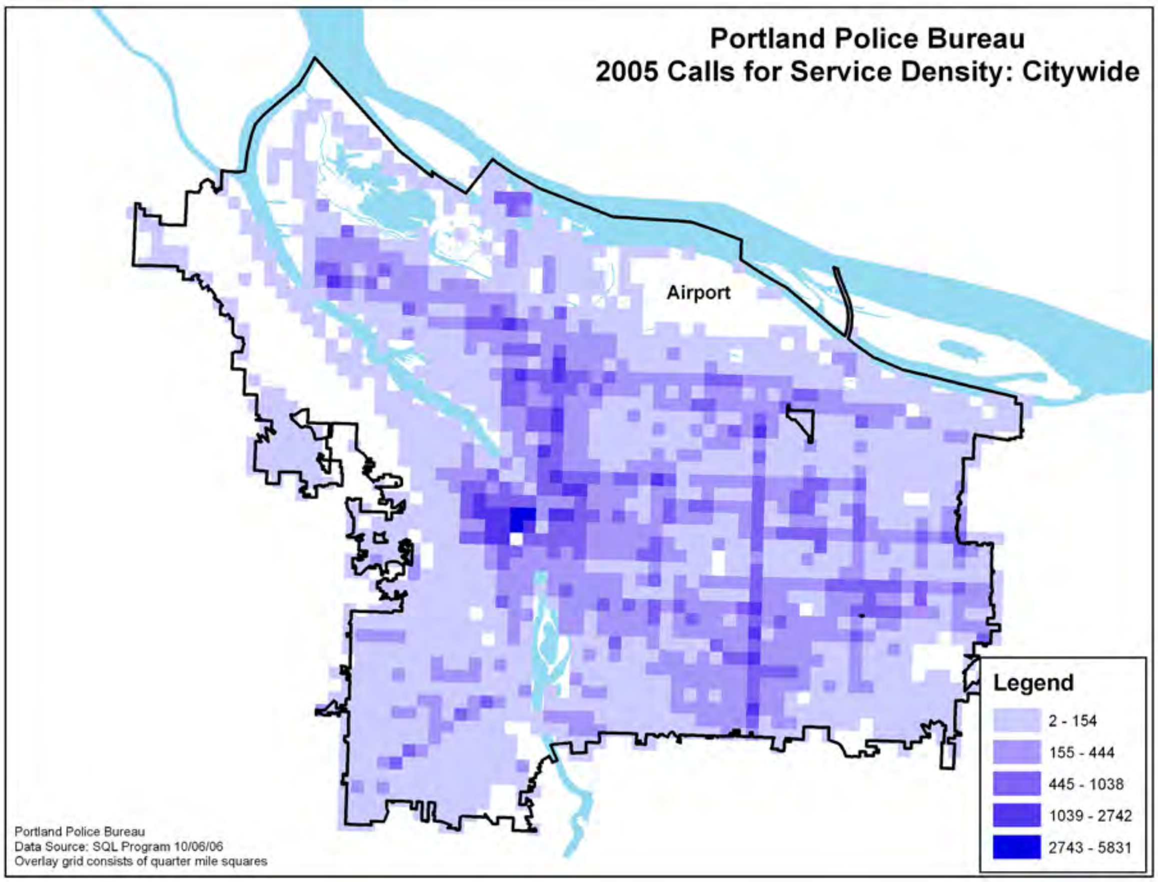
Appendix F:

CITYWIDE CRIME MAP



Appendix G:

CITYWIDE CALLS FOR SERVICE MAP



Appendix H:

DETAILED MARKET ANALYSIS DATA

Retail MarketPlace Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times				**Latitude:**	**45.504054**
SE Division St and SE 136th Ave				**Longitude:**	**-122.523656**
Portland, OR 97236	**Site Type:**	**Drivetime**		**Drivetime:**	**5 minutes**

Summary Demographics	
2007 Population	78,031
2007 Households	28,307
2007 Median Disposable Income	$37,139
2007 Per Capita Income	$21,648

Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$656,193,042	$845,890,826	**-$189,697,784**	**-12.6**	449
Total Retail Trade (NAICS 44-45)	$566,439,288	$757,478,860	**-$191,039,572**	**-14.4**	315
Total Food & Drink (NAICS 722)	$89,753,754	$88,411,966	**$1,341,788**	**0.8**	134

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$148,993,590	$298,522,061	**-$149,528,471**	**-33.4**	53
Automobile Dealers (NAICS 4411)	$125,333,477	$271,697,218	**-$146,363,741**	**-36.9**	25
Other Motor Vehicle Dealers (NAICS 4412)	$11,929,822	$8,769,178	**$3,160,644**	**15.3**	8
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$11,730,291	$18,055,665	**-$6,325,374**	**-21.2**	20
Furniture & Home Furnishings Stores (NAICS 442)	$20,112,645	$13,763,249	**$6,349,396**	**18.7**	19
Furniture Stores (NAICS 4421)	$10,970,835	$5,251,883	**$5,718,952**	**35.3**	7
Home Furnishings Stores (NAICS 4422)	$9,141,810	$8,511,366	**$630,444**	**3.6**	12
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$18,228,082	$7,114,773	**$11,113,309**	**43.9**	19
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$19,035,815	$14,372,549	**$4,663,266**	**14.0**	22
Building Material and Supplies Dealers (NAICS 4441)	$17,823,277	$13,550,780	**$4,272,497**	**13.6**	16
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,212,538	$821,769	**$390,769**	**19.2**	6
Food & Beverage Stores (NAICS 445)	$123,168,475	$107,366,899	**$15,801,576**	**6.9**	48
Grocery Stores (NAICS 4451)	$113,355,977	$102,491,707	**$10,864,270**	**5.0**	40
Specialty Food Stores (NAICS 4452)	$5,202,231	$869,016	**$4,333,215**	**71.4**	6
Beer, Wine, and Liquor Stores (NAICS 4453)	$4,610,267	$4,006,176	**$604,091**	**7.0**	2
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$19,493,889	$27,057,547	**-$7,563,658**	**-16.2**	18
Gasoline Stations (NAICS 447/NAICS 4471)	$54,246,773	$46,617,159	**$7,629,614**	**7.6**	24
Clothing and Clothing Accessories Stores (NAICS 448)	$36,957,314	$8,809,995	**$28,147,319**	**61.5**	22
Clothing Stores (NAICS 4481)	$29,743,156	$5,778,447	**$23,964,709**	**67.5**	15
Shoe Stores (NAICS 4482)	$4,935,528	$1,769,511	**$3,166,017**	**47.2**	3
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$2,278,630	$1,262,037	**$1,016,593**	**28.7**	4
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$11,243,737	$21,605,804	**-$10,362,067**	**-31.5**	22
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$6,032,848	$19,892,965	**-$13,860,117**	**-53.5**	15
Book, Periodical, and Music Stores (NAICS 4512)	$5,210,889	$1,712,839	**$3,498,050**	**50.5**	7

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and *info*USA®.

Retail MarketPlace Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times				**Latitude:**	**45.504054**
SE Division St and SE 136th Ave				**Longitude:**	**-122.523656**
Portland, OR 97236	**Site Type:**	**Drivetime**		**Drivetime:**	**5 minutes**

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
General Merchandise Stores (NAICS 452)	$86,898,119	$178,292,575	**-$91,394,456**	**-34.5**	13
Department Stores Excluding Leased Depts. (NAICS 4521)	$55,072,303	$71,928,775	**-$16,856,472**	**-13.3**	6
Other General Merchandise Stores (NAICS 4529)	$31,825,816	$106,363,800	**-$74,537,984**	**-53.9**	7
Miscellaneous Store Retailers (NAICS 453)	$10,729,386	$30,338,872	**-$19,609,486**	**-47.7**	54
Florists (NAICS 4531)	$833,985	$468,961	**$365,024**	**28.0**	6
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$3,867,385	$7,088,810	**-$3,221,425**	**-29.4**	14
Used Merchandise Stores (NAICS 4533)	$771,813	$5,649,775	**-$4,877,962**	**-76.0**	12
Other Miscellaneous Store Retailers (NAICS 4539)	$5,256,203	$17,131,326	**-$11,875,123**	**-53.0**	22
Nonstore Retailers (NAICS 454)	$17,331,463	$3,617,377	**$13,714,086**	**65.5**	1
Electronic Shopping and Mail-Order Houses (NAICS 4541)	$6,223,504	$3,598,711	**$2,624,793**	**26.7**	1
Vending Machine Operators (NAICS 4542)	$4,415,802	$18,666	**$4,397,136**	**99.2**	0
Direct Selling Establishments (NAICS 4543)	$6,692,157	$0	**$6,692,157**	**100.0**	0
Food Services & Drinking Places (NAICS 722)	$89,753,754	$88,411,966	**$1,341,788**	**0.8**	134
Full-Service Restaurants (NAICS 7221)	$28,214,192	$37,259,843	**-$9,045,651**	**-13.8**	6
Limited-Service Eating Places (NAICS 7222)	$41,932,173	$39,307,044	**$2,625,129**	**3.2**	107
Special Food Services (NAICS 7223)	$11,230,782	$871,286	**$10,359,496**	**85.6**	2
Drinking Places - Alcoholic Beverages (NAICS 7224)	$8,376,607	$10,973,793	**-$2,597,186**	**-13.4**	19

Retail MarketPlace Profile

Prepared by City of Portland, Bureau of Planning

Division 110-162: Drive times				**Latitude:**	**45.504054**
SE Division St and SE 136th Ave				**Longitude:**	**-122.523656**
Portland, OR 97236	**Site Type:**	**Drivetime**		**Drivetime:**	**10 minutes**

Summary Demographics		
2007 Population	303,156	55.21%
2007 Households	116,404	4.11
2007 Median Disposable Income	$38,718	
2007 Per Capita Income	$24,953	

Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap (Demand - Supply)**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$2,937,973,150	$3,209,820,356	-$271,847,206	-4.4	2,285
Total Retail Trade (NAICS 44-45)	$2,537,595,878	$2,729,140,516	-$191,544,638	-3.6	1,600
Total Food & Drink (NAICS 722)	$400,377,272	$480,679,840	-$80,302,568	-9.1	685

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$672,822,436	$792,170,655	-$119,348,219	-8.1	254
Automobile Dealers (NAICS 4411)	$565,612,883	$593,964,824	-$28,351,941	-2.4	104
Other Motor Vehicle Dealers (NAICS 4412)	$54,698,835	$109,339,444	-$54,640,609	-33.3	54
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$52,510,718	$88,866,387	-$36,355,669	-25.7	96
Furniture & Home Furnishings Stores (NAICS 442)	$90,784,917	$70,379,109	$20,405,808	12.7	115
Furniture Stores (NAICS 4421)	$49,449,981	$32,758,800	$16,691,181	20.3	51
Home Furnishings Stores (NAICS 4422)	$41,334,936	$37,620,309	$3,714,627	4.7	64
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$81,345,036	$61,214,766	$20,130,270	14.1	97
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$85,921,679	$66,461,799	$19,459,880	12.8	127
Building Material and Supplies Dealers (NAICS 4441)	$80,080,634	$60,934,018	$19,146,616	13.6	95
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$5,841,045	$5,527,781	$313,264	2.8	32
Food & Beverage Stores (NAICS 445)	$544,633,665	$496,979,295	$47,654,370	4.6	236
Grocery Stores (NAICS 4451)	$501,075,349	$459,021,741	$42,053,608	4.4	159
Specialty Food Stores (NAICS 4452)	$23,159,262	$14,384,855	$8,774,407	23.4	60
Beer, Wine, and Liquor Stores (NAICS 4453)	$20,399,054	$23,572,699	-$3,173,645	-7.2	17
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$87,219,071	$135,459,245	-$48,240,174	-21.7	89
Gasoline Stations (NAICS 447/NAICS 4471)	$242,791,038	$208,287,422	$34,503,616	7.6	80
Clothing and Clothing Accessories Stores (NAICS 448)	$161,874,767	$108,245,162	$53,629,605	19.9	136
Clothing Stores (NAICS 4481)	$130,206,771	$79,641,230	$50,565,541	24.1	97
Shoe Stores (NAICS 4482)	$21,467,698	$19,502,622	$1,965,076	4.8	15
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$10,200,298	$9,101,310	$1,098,988	5.7	24
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$49,970,682	$89,915,829	-$39,945,147	-28.6	131
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$26,969,889	$72,138,862	-$45,168,973	-45.6	95
Book, Periodical, and Music Stores (NAICS 4512)	$23,000,793	$17,776,967	$5,223,826	12.8	36

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

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Retail MarketPlace Profile

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Division 110-162: Drive times				**Latitude:**	**45.504054**
SE Division St and SE 136th Ave				**Longitude:**	**-122.523656**
Portland, OR 97236	**Site Type:**	**Drivetime**		**Drivetime:**	**10 minutes**

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
General Merchandise Stores (NAICS 452)	$396,810,603	$555,196,662	-$158,386,059	-16.6	48
Department Stores Excluding Leased Depts. (NAICS 4521)	$249,836,635	$322,447,775	-$72,611,140	-12.7	31
Other General Merchandise Stores (NAICS 4529)	$146,973,968	$232,748,887	-$85,774,919	-22.6	17
Miscellaneous Store Retailers (NAICS 453)	$47,749,657	$100,563,212	-$52,813,555	-35.6	271
Florists (NAICS 4531)	$3,730,256	$2,729,541	$1,000,715	15.5	38
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$17,100,934	$22,943,014	-$5,842,080	-14.6	62
Used Merchandise Stores (NAICS 4533)	$3,463,168	$19,011,834	-$15,548,666	-69.2	66
Other Miscellaneous Store Retailers (NAICS 4539)	$23,455,299	$55,878,823	-$32,423,524	-40.9	105
Nonstore Retailers (NAICS 454)	$75,672,327	$44,267,360	$31,404,967	26.2	16
Electronic Shopping and Mail-Order Houses (NAICS 4541)	$27,628,392	$23,571,557	$4,056,835	7.9	3
Vending Machine Operators (NAICS 4542)	$19,378,609	$5,232,958	$14,145,651	57.5	6
Direct Selling Establishments (NAICS 4543)	$28,665,326	$15,462,845	$13,202,481	29.9	7
Food Services & Drinking Places (NAICS 722)	$400,377,272	$480,679,840	-$80,302,568	-9.1	685
Full-Service Restaurants (NAICS 7221)	$127,379,551	$224,135,726	-$96,756,175	-27.5	33
Limited-Service Eating Places (NAICS 7222)	$187,067,167	$187,662,509	-$595,342	-0.2	548
Special Food Services (NAICS 7223)	$48,866,999	$15,946,392	$32,920,607	50.8	15
Drinking Places - Alcoholic Beverages (NAICS 7224)	$37,063,555	$52,935,213	-$15,871,658	-17.6	89