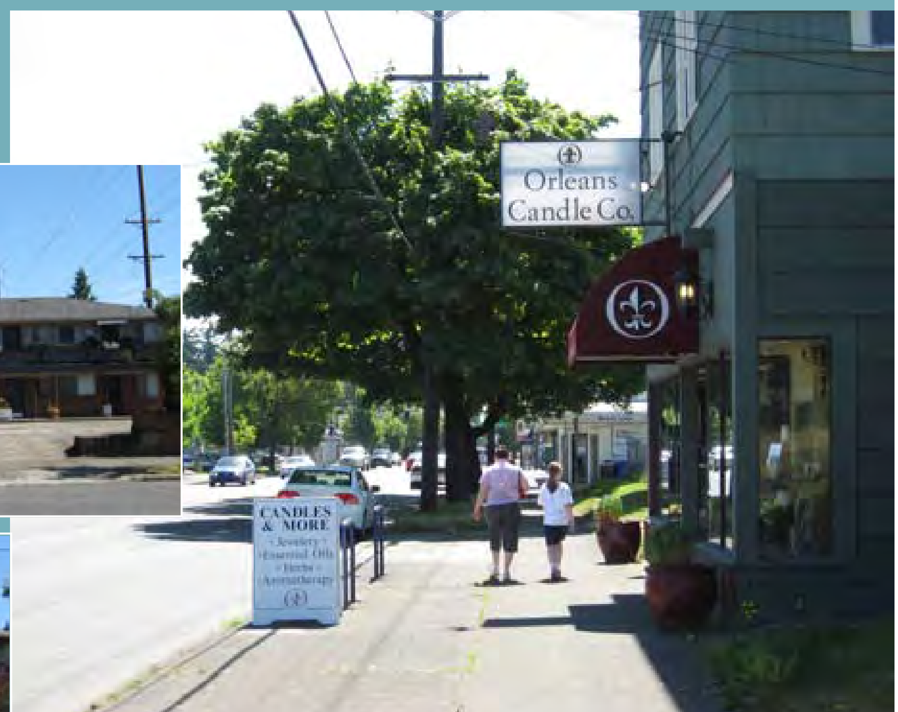
Lombard Blvd. Commercial Corridor
RETAIL MARKET ANALYSIS



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Study Overview

According to the National Trust for Historic Preservation's Main Street program, "commercial district[s] [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 the retail market for the economic restructuring element. Later phases of the Commercial Corridors Project for the city could address the design, promotion, and organizational capacity needs of the corridor.


ENCANTO is a new Mexican restaurant on Lombard Blvd. that offers fusion Mexican cuisine; storefront improvements and a capital intensive interior are inviting.

This report is part of the second phase of a project that began 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 convenience and comparison shopping goods and services, serving users ranging from the local neighborhoods to the regional populations.

Phase II of the Commercial Corridor Study, which began in spring 2006 and is anticipated to be completed in Winter 2007, incorporates a detailed retail market analysis of five of the 93 commercial corridors identified in phase 1 of this research.

These corridors include:

- 82nd Avenue (Glisan Street to Powell Boulevard)
- Glisan Street (57th to 82nd Avenue)
- North Lombard Street (Carey to Interstate)
- Lombard Street (57th to 92nd Avenue)
- Division Avenue (110th to 162nd)

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

Several factors influenced which corridors were selected for Phase II. All of the Phase II corridors are viewed as a challenging commercial areas located outside the Central City and the City's urban renewal districts. 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 help improve the vitality of these corridors. 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 – including retail leakage[2] and surplus – 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.

[2]A sales leakage analysis looks at a variety of merchandise categories and determines if the district is capturing its full retail sales potential. The sales leakage analysis helps a business district understand its market strengths for marketing, business expansion, and retail business expansion and recruitment opportunities.

Methodology

This retail market analysis is one tool for identifying retail market opportunities 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 Corridor buildings and storefronts to provide qualitative information. A copy of the survey is included in Appendix B. The data and findings from this study will provide an understanding of the local market area that should inform land use planning, economic and business development decisions.

Fabric World is an established business on Lombard with a sign that could use a lift. The business could benefit from a sign and façade improvement program.

In conducting this study, specific trade areas were defined. As the Corridor's neighborhood trade area, where convenience shopping would likely take place, we chose a one-mile radius, while the community trade area, with more comparison shopping options, is a one-and-a-half mile radius, drawn as concentric circles originating from its center point at the intersection of N Lombard Street and Chautauqua Street. The Lombard corridor was selected based upon a variety of factors, including, but not limited to, recent redevelopment, changing demographics, business association activity and geographic proximity to other major malls and retail centers that are likely to compete with corridor businesses. 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 from within a three-mile 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 thirty-eight percent (n=72 businesses) response rate was gathered and consequently reflected in the Business Environment section of the report.

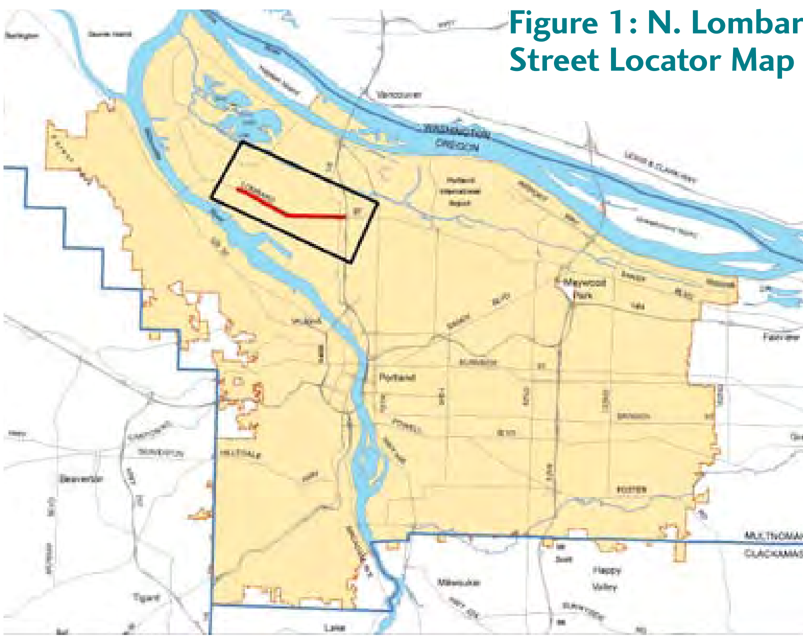
Existing Conditions

Overview of the Lombard Blvd. Corridor

The most notable features of the Lombard Street Corridor is the selection of small and minority-owned businesses offering a variety of services to area residents. Another feature is the number of single-family houses and apartment buildings located along the Corridor that could support the area's businesses and provide the "eyes on the street" that many corridors lack.

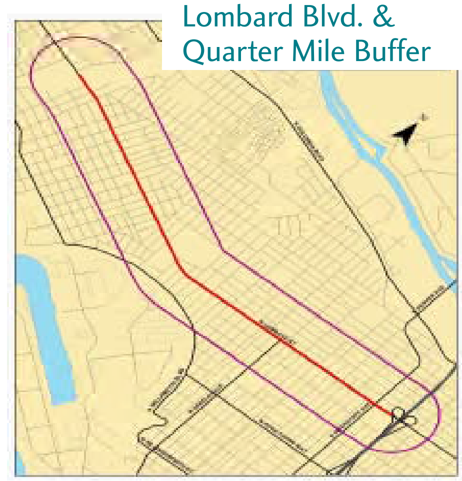
The Corridor in this study is located 7 miles north of downtown Portland and, as shown in Figure 1, extends roughly 2 miles along Lombard Street from Interstate Street to Carey Avenue. It is contained within four Portland neighborhoods including Kenton, Portsmouth, Arbor Lodge, and University Park, and is served by the North Portland Business Association.

Figure 1: N. Lombard Street Locator Map



Source: Portland Bureau of Planning

Lombard Blvd. & Quarter Mile Buffer



[3]For more information on the Metro Region 2040 Growth plan visit the following website http://www.metro-region.org/article.cfm?ArticleID=6555

TRANSPORTATION

Lombard Street is a State Highway (US 30 Bypass) that extends from Killingsworth Blvd. to the East and the St. John's Town Center to the West. The segment examined in this study (Interstate to Carey Avenue) is considered a Metro Region 2040[3] Main Street and serves as a minor freight route for the Rivergate Industrial District. The Corridor segment is made up of concentrations of commercial/retail activity and single-family and multi-family residential uses. With three bus lines (see Table 1), two of which are frequent service (running every fifteen minutes), and the Max Yellow Line, accessible at the Interstate and Lombard intersection, the corridor is well-served by public transit.

Table 1: Bus Lines Serving the Corridor

Line 75 – Lombard Avenue - St. Johns to Milwaukie Town Center
Line 4 – Fessenden (frequent service) - St. Johns Town Center to Portland City Center
Line 6 – Martin Luther King (frequent service) – Jantzen Beach to Portland City Center
MAX Yellow Line to Expo Center and City Center – Intersection of Lombard and Interstate

RECENT DEVELOPMENT

The segment of Lombard Street that is part of this study is anchored on both ends by large format retail venues, which include a full-service Fred Meyer, Panda Express, Verizon Wireless, and other capital-intensive establishments. The transit station at the intersection of Lombard and Interstate Avenue has sparked reinvestment, such as the aforementioned Fred Meyer Shopping Center, the De La Salle North Catholic High School, and Aaron's Leasing Center. More land-intensive transit oriented development is slow to come due to market entry constraints. Further research and zoning changes to accommodate high density uses out of the Portland Development Commission and Planning Bureau will provide some insight into the redevelopment potential of the light rail corridor. More recently, new development interspersed along the Lombard Corridor suggests signs of revitalization.

Reinvestment along Lombard Street offers a more inviting streetscape. Landscaping and sidewalk improvements are triggered when rehabilitation, alteration, or redevelopment occurs. A few such improvements are the Direct Development site, the Goodwill site, the Walgreens and Rite Aid sites, and the Washington Mutual Bank site. Market values for these properties, including land and improvements, have increased fifty-percent over the 2002-2006 period.

Signs of reinvestment along the Lombard Corridor.

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 Sandy 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.

CURRENT ZONING

This segment of Lombard Street is predominately zoned CG (General Commercial) with areas of R1 (Medium Density Residential). The General Commercial zone supports an automobile-oriented, low density environment, while the large tracts of medium density multi-family zoning allows for low scale multi-family residential development (no more than two stories) adjacent to commercial areas and transit.

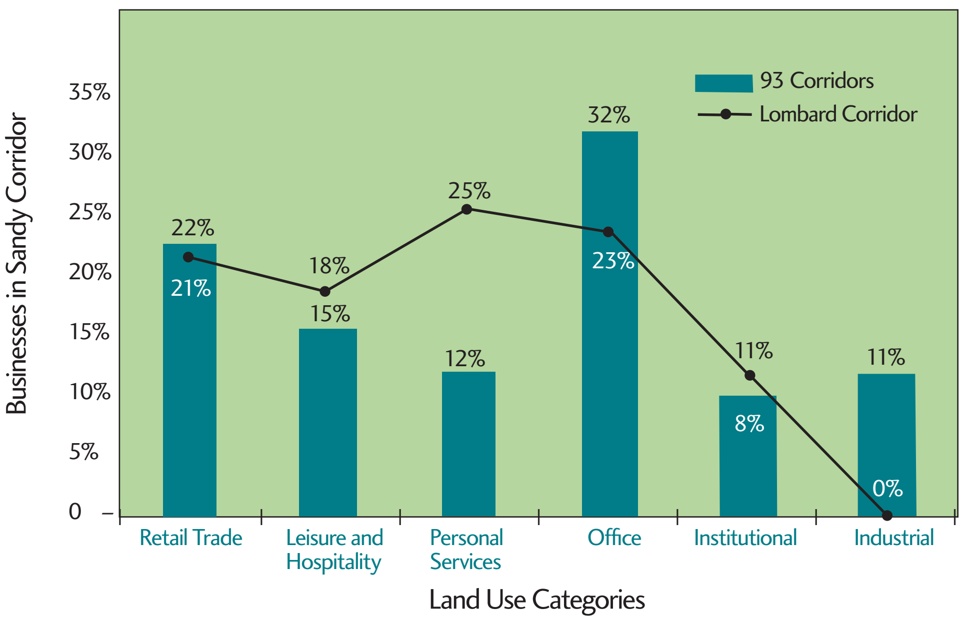
Commercial activities dominate the stretch of Lombard Street from Interstate to N. Washburne Avenue and then again from Woolsey to Carey Avenue. Medium density residential uses are interspersed as a result of zoning changes in the 1980s.[4] From N. Washburne to N. Woolsey Avenue single family residential uses dominate; the residential stretch is anchored on Woolsey Avenue by Columbia Park, offering over 35 acres of open space to residents. Businesses located in this area are a mix of national franchises and locally owned businesses, primarily serving neighborhood residents. Many of the businesses along this segment of Lombard are auto-oriented, which include auto repair and servicing, fast food establishments, and convenience stores. Other retailers offer more specialized products and services including, car upholstery, antique vendors, lampshade sales, and a variety of goods and services catering to Spanish-speaking households. Generally, most retail development along this segment of Lombard Street is limited to one story, with a few mixed use buildings no taller than two-stories.

Medium density residential (R1) zoning was introduced to long strips of corridors in the 1980s to break up the commercial uses.

LOMBARD STREET IN RELATION TO OTHER CORRIDORS

Figures 2 and 3 below show the percentage of businesses and employees by land use category within the Lombard Corridor in comparison to the 93 commercial corridors citywide identified in Phase I of this study. This Corridor is comprised of 161 businesses employing an estimated 627 persons compared to 6,777 businesses in all 93 corridors employing an estimated 64,941 persons. Since a comprehensive on-the-ground land use and business inventory was conducted along the Lombard 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. 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 since some employee data are not available and therefore are not reflected in these totals. However, in order to illustrate the important job and entrepreneurship opportunities available along these corridors, it is important to understand the current economic make-up of Lombard Street.

Figure 2: Percentage of Businesses by Land Use Category

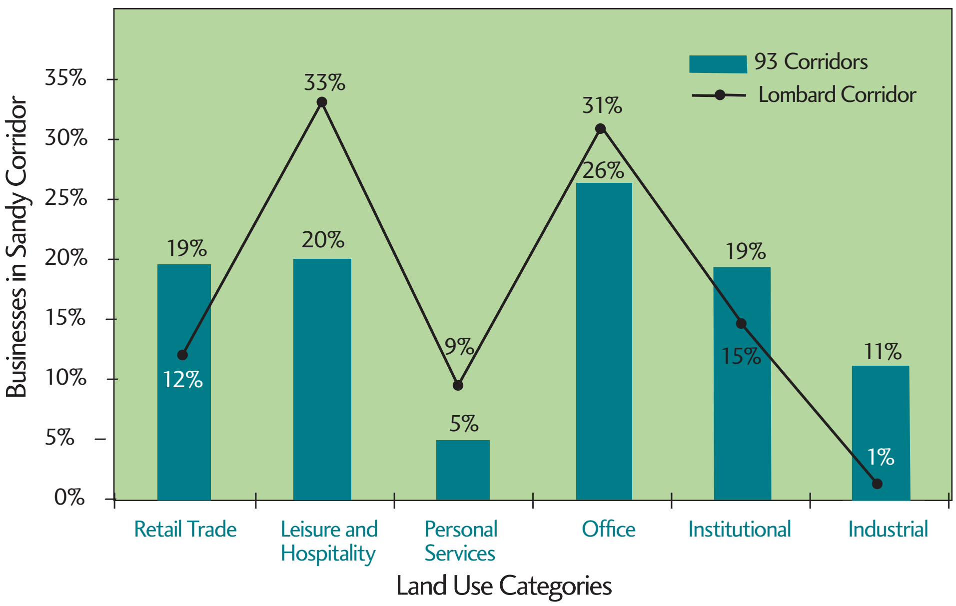


InfoUSA, 2005 data for 93 Corridors. Bureau of Planning Land Use Inventory for Lombard Street Corridor.

Findings:

- The business mix along the Lombard Corridor is generally similar to that of all corridors citywide. However, the Lombard Corridor has a slightly higher percentage of Personal Uses – 25 percent compared to 12 percent citywide. Further, at 18 percent, the percentage of Leisure and Hospitality businesses along the Corridor is three percent higher than the percentage for all 93 corridors. While Industrial uses in the corridor is well below the average for all 93 corridors at 1 percent versus 11 percent.
- Office uses along Lombard are lower than citywide by about nine percent.
- The Corridor has slightly fewer Retail Trade businesses than other corridors citywide – 21 percent compared to 22 percent for all 93 corridors.

Figure 3: Percentage of Employees by Land Use Category



InfoUSA, 2005 data for 93 Corridors. Bureau of Planning Land Use Inventory for Sandy Boulevard Corridor.

Findings:

- Relative to all corridors citywide, the percentage of leisure and hospitality employees in the Corridor is significantly higher — 33 percent compared to 20 percent for all 93 corridors.
- Office employment in the corridor is higher than citywide (31 percent and 26 percent, respectively), but Office use make-up only 23 percent of the uses.
- There are smaller percentages of retail trade and industrial workers along the Corridor — 12 percent and 1 percent, respectively, compared to 19 percent and 11 percent citywide, respectively. While the Corridor has a smaller percentage of employees working in the Institutional and Office industries, the difference is a modest four percent.

LAND USE INVENTORY

A review of existing land use and development patterns can provide useful information on how an area has evolved over the years and what type of development is likely to occur in the future. In summer 2007, the Bureau of Planning conducted a land use inventory along the Lombard 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 200 businesses and 251 tax lots, which may include multiple uses within a building or strip mall as well as parking 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.

University Grill Family Dining soon to open.

Public Storage on Lombard.

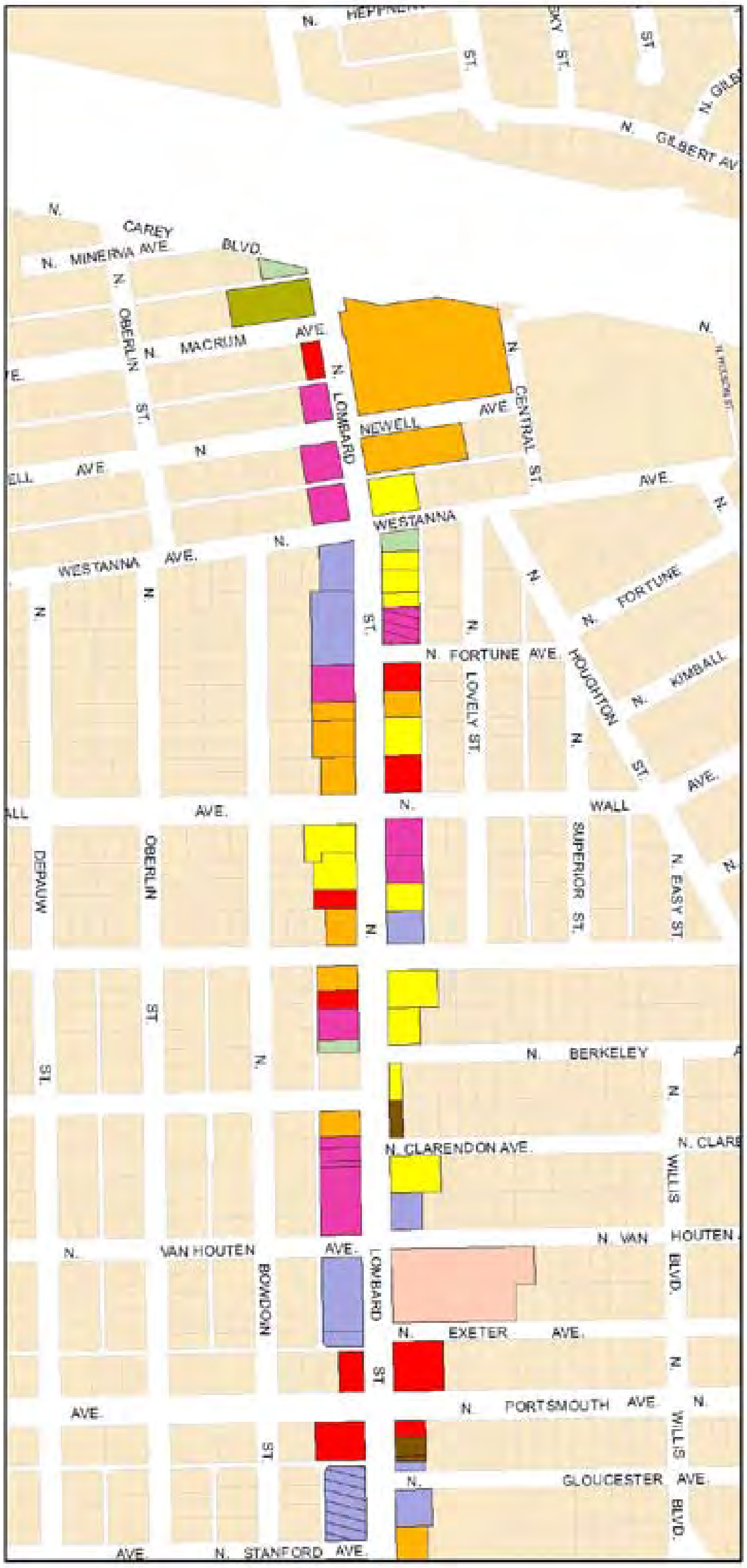


Figure 4: Land Use Map – West Section

- Retail Trade
- Personal Services
- Leisure and Hospitality
- Office
- Institutional
- Residential
- Industrial
- Utilities
- Parking Lot
- Open Space
- Vacant Land
- Vacant Building
- Multi-use Properties

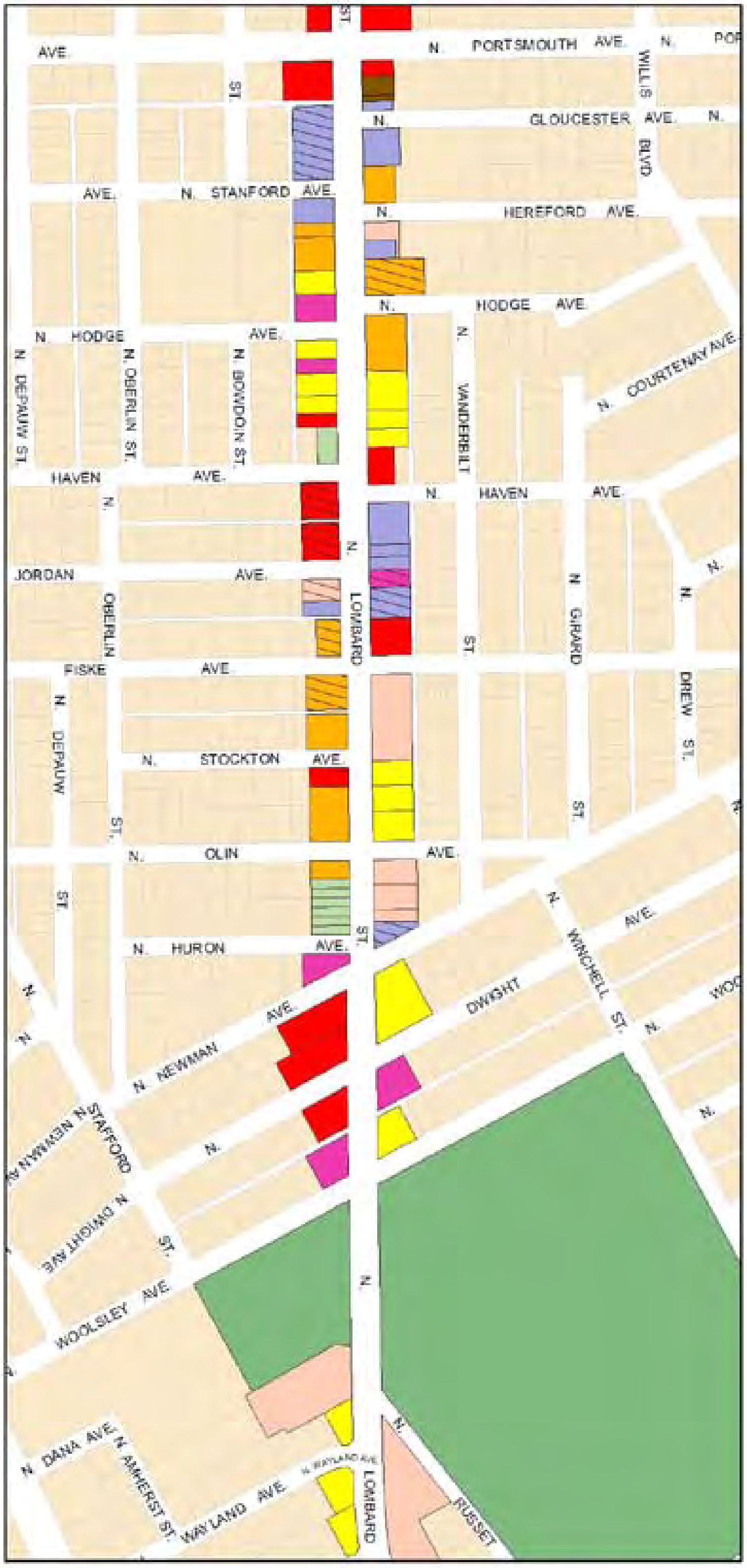


Figure 4: Land Use Map – Mid Section

- Retail Trade
- Personal Services
- Leisure and Hospitality
- Office
- Institutional
- Residential
- Industrial
- Utilities
- Parking Lot
- Open Space
- Vacant Land
- Vacant Building
- Multi-use Properties

Figure 4: Land Use Map – East Section

- Retail Trade
- Personal Services
- Leisure and Hospitality
- Office
- Institutional
- Residential
- Industrial
- Utilities
- Parking Lot
- Open Space
- Vacant Land
- Vacant Building
- Multi-use Properties

Table 2 provides a summary of land uses within the Lombard Corridor 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. 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.

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 Personal Services and Office uses, which occupy 25 percent and 23 percent of the Corridor's total uses 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					
Retail Trade	44-45	42	21%	130,140	11.9%
Motor Vehicle Dealers	4411-2	4	2%	14,108	1.3%
Food and Beverage Stores	445	12	6%	21,610	2%
All Other Retail Trade	*	26	13%	94,422	8.6%
Leisure and Hospitality		37	18%	64,645	5.9%
Restaurants and Bars	722	35	17%	63,145	5.8%
Lodging	721	0	0%	0	0%
Arts, Entertainment and Recreation	711-3	2	1%	1,500	0.1%
Personal Services		51	25%	62,672	5.7%
Automotive Repair and Maintenance	8111	13	6%	42,561	3.9%
Personal Care and Laundry Facilities		21	10%	20,111	1.8%
Other Repair and Maintenance	8113-4	0	0%	0	0%
Office		47	23%	94,875	8.7%
Medical and Dental Offices	622-3	14	7%	46,505	4.3%
Professional and Business Services	541, 551, 561	12	6%	31,962	2.9%
Financial Activities	521-5, 531-3	19	9%	12,964	1.2%
Information	511-2, 515-9	1	0%	-	-
Government	921-8	1	0%	3,444	0.3%
Institutional		23	11%	191,866	17.6%
Religious, Community and Social Service Institutions	813, 624	21	10%	138,223	12.7%
Schools and Colleges	611	2	1%	53,643	4.9%
Medical Centers and Residential Care Facilities	622-3	0	0%	0	0%
Industrial	**	2	1%	3,600	0.3%
Total Employment Uses		202	100%	1,091,996	100%
NON-EMPLOYMENT USES					
Open Space		2	2%	1,361,686	82.2%
Residential		68	76%	228,643	13.8%
Vacant Residential		*	*	*	*
Vacant Building or Storefront		8	9%	23,436	1.4%
Vacant Land		12	13%	42,179	2.5%
Total Non-Employment Uses		90	100%	1,655,944	100%
Total Uses		292	na	2,747,940	na

Findings:

- Residential use is the predominant non-employment land use along the corridor. A mix of apartment buildings and single family residential make up the Corridor with the predominance between Washburne and Fiske Avenue streets.
- The Personal Services category, including automotive repair and maintenance, personal care and laundry services, and other repair and maintenance, is the predominant employment land use along the Corridor, accounting for an estimated 25 percent of total employment uses.
- In addition, Office related businesses, such as medical, dental, real estate, and financial institutions makes up 23 percent of total employment land uses along the Corridor.
- Thirty-five restaurants and bars (17 percent of employment uses), featuring a variety of dining options, are located along the Corridor.
- Redevelopment potential exists along the corridor; currently there are eight building and storefront vacancies with 23,436 square feet of space available for retail/commercial uses. Development opportunities exists, but lot size could present a challenge for developers.

INDUSTRY MIX

Tables 3 to 6 provide more detail for four of the main industry sectors (Other Services, Retail Trade, Accommodation and Food Services, and Health Care and Social Assistance) along the Corridor using five-digit NAICS codes.

Table 3 below shows the distribution of businesses for the category, "Other Services" by 5-Digit NAICS classification.

Table 3: Other Service Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Automotive Mechanical and Electrical Repair and Maintenance	81111	10	19.2%
Automotive Body, Paint, Interior and Glass Repair	81112	1	1.9%
Other Automotive Repair and Maintenance	81119	2	3.8%
Hair, Nail and Skin Care Services	81211	15	28.8%
Other Personal Care Services	81219	1	1.9%
Coin Operated laundries and dry cleaners	81231	1	1.9%
Dry cleaning and Laundry Services	81232	3	5.8%
Pet Care (except Vet.) Services	81291	1	1.9%
Religious Organizations	81311	11	21.2%
Civic and Social Organizations	81341	2	3.8%
Labor Unions and Similar Organizations	81393	5	9.6%
Total		**52**	**100%**

Source: Portland Bureau of Planning 2007 Inventory of Businesses

Findings:

- Businesses specializing in Automotive Mechanical and Electrical Repair and Maintenance and Hair, Nail and Skin Care Services are well represented along the Corridor, accounting for a combined forty-eight percent of businesses in the "Other Services" industry sub sector.
- The Corridor is home to eleven religious organizations (21% of the uses) representing a broad mix of cultures and faiths such as the University Park Baptist Church, Rivergate Community Church, and St. Lutheran's Church. Many of the churches hold services in multiple languages and offer their space to other nationalities.

"Other Services" includes religious organizations

Table 4 below shows the distribution of Retail Trade businesses by 5-Digit NAICS classification.

Table 4: Retail Trade Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Used Car Dealers	44112	4	9.3%
Automotive Parts and Accessories Stores	44131	1	2.3%
Other Home Furnishings Stores	44229	1	2.3%
Electronics and Appliance Stores	44311	1	2.3%
Outdoor Power Equipment and Supplies Store	44421	1	2.3%
Convenience Stores	44512	10	23.3%
Meatmarkets	44521	2	4.7%
Pharmacies and Drug Stores	44611	2	4.7%
Optical Goods Stores	44613	1	2.3%
Gasoline Stations with Convenience Store	44711	5	11.6%
Family Clothing Stores	44814	1	2.3%
Other Clothing Stores	44819	3	7%
Hobby, Toy and Game Stores	45112	1	2.3%
Sewing, Needlework and Piece Goods Stores	45113	2	4.7%
Musical Instrument and Supplies Stores	45114	1	2.3%
Florists	45311	1	2.3%
Used Merchandise Stores	45331	1	2.3%
Pet and Pet Supplies Stores	45391	1	2.3%
All Other Misc. Store Retailers	45399	4	9.3%
Total		43	100%

Findings:

- Convenience Stores constitute 23 percent of Retail Trade businesses along the Corridor. Four Hispanic markets, La Tienda Tepeyek, El Paisano Tienda, El Matador Carnecia and Market, and Tienda El Rayito, two 7-Elevens, and a Plaid Pantry are a few examples of the Corridor's diverse mix of Food and Beverage retailers.
- Automotive oriented businesses such as Used Car Dealers and Gasoline Stations constitute over 20 percent of the Retail Trade businesses along Lombard Blvd.
- The Corridor is comprised of a number of neighborhood serving businesses such as a pharmacy, florist, pet supplies store, craft store, musical instruments vendor, convenience stores, meat markets, and optical goods store.

Lombard Blvd. hosts a variety of Hispanic businesses, creating a small market niche comparable to 82nd Avenue's Asian market niche.

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

Table 5: Accommodation and Food Services Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Full Service Restaurants	72211	14	40%
Limited Service Eating Places	72221	12	34.3%
Mobile Food Services	72233	1	2.9%
Drinking Places (Alcoholic Beverages)	72241	8	22.9%
Total		35	100%

Source: Portland Bureau of Planning 2007 Inventory of Businesses

Findings:

- Full Service Restaurants and Limited Service Eating Places (i.e. fast food) comprise 74 percent of the Corridor's Accommodation and Food Service employers (26 businesses). An assortment of restaurants and cafes, including Encanto Mexican Restaurant, Lung Fung Restaurant, and Big Daddy Smokehouse, as well as twelve fast food franchises including Subway, Pizza Hut and Jack in the Box, to name a few, are located on the Corridor.
- Eight drinking establishments, including Mouse Trap Bar, the Blue Parrot Tavern, Mock's Crest Tavern, Jack and Jerry's Tavern are located on the Corridor.

Table 6 below shows the distribution of businesses in the Health Care and Social Assistance sector by 5-Digit NAICS classification.

Table 6: Health Care and Social Assistance Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Offices of Dentists	62121	8	57.1%
Office of Chiropractors	62131	2	14.3%
Outpatient Mental Health and Substance Abuse Centers	62142	1	7.1%
Child and Youth Services	62411	1	7.1%
Other Individual and Family Services	62419	2	14.3%
Total		**14**	**100%**

Source: Portland Bureau of Planning 2007 Inventory of Businesses

Findings:

- Dentist's offices comprise 57 percent of the businesses in the Health Care and Social Assistance industry sector.
- In addition to dentists, several health practitioners specializing in chiropractic medicine and mental health also have offices along the Corridor.
- Child and family services make up twenty-one percent of this category.

Demographics

This section is designed to provide a technical examination of the conditions that impact the market demand for the Lombard 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. In 2007, Lombard Blvd. had a median disposable income of $38,780 with 6,261 households. Therefore, the potential buying power of area residents in this segment is simply the disposable income multiplied by the number of households. For Lombard Street this translates into $242,801,580. In addition, area workers and visitors represent another opportunity for businesses along the corridor to stop and shop. As described in the Methodology section, the majority of potential customers are assumed to be drawn from a 1.5 mile area originating from the Corridor's center point (see Figure 5). While the Corridor functions primarily as a neighborhood commercial area some of its retail sales may originate from beyond the neighborhood and community trade areas, as a result of its proximity to the Light Rail station, St. Johns Town Center, and two large format retail shopping centers anchoring both ends of the corridor.

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 Lombard 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.

Figure 5: Map of Neighborhood (1-mile) and Community (1.5-mile) Trade Areas

Source: ESRI Business Analyst and Portland Bureau of Planning.

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	7,775	7,863	1.13%
Community Trade Area	10,744	12,411	15.52%
Portland	235,180	299,355	27.29%

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 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	17,090	22,751	33.12%
Community Trade Area	19,887	26,597	33.65%
Portland	437,297	599,997	37.21%

Source: Metro

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

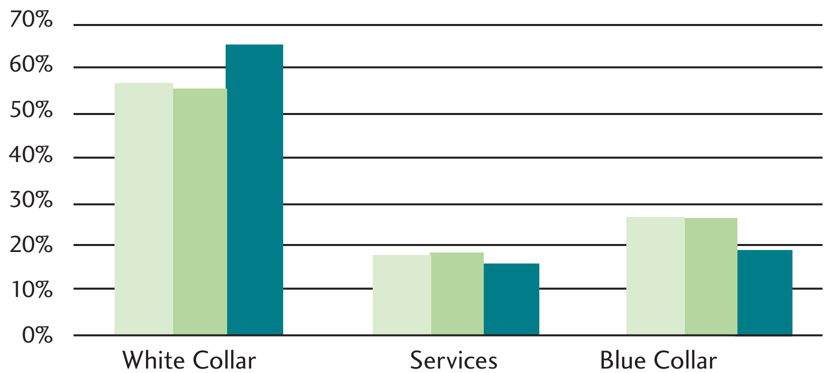
Findings:

- The neighborhood trade area is projected to experience significantly lower population growth than the community trade area and the City between 2005 and 2030.
- The projected employment growth rate of the neighborhood trade area is anticipated to experience similar employment growth as 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 one percent between 2005 and 2030, employment in the neighborhood is expected to increase by 33 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 services workers. As shown in Figure 6 below, at 56 percent, the majority of workers in the neighborhood trade area are white collar workers. Accordingly, businesses that offer a broad mix of goods and services consumed by white collar professionals are likely to thrive in the neighborhood trade area. In addition, given that an estimated 44 percent of neighborhood residents are services and blue collar workers, a discount store or used merchandise store seeking to locate in Portland might consider the Lombard Street neighborhood trade area a good location. However, businesses such as gourmet grocers and boutique clothing stores that cater almost exclusively to college-educated, white collar professionals are likely to locate in a more affluent neighborhood than Lombard Street.

Figure 6: 2005 Employed Population 16+ by Occupation



	White Collar	Services	Blue Collar
Neighborhood Trade Area	56%	17%	27%
Community Trade Area	55%	18%	27%
Portland	65%	16%	19%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI 2007 estimates for neighborhood and community trade areas; Portland are based on 2000 Census

Findings:

- Compared to the City, the neighborhood has a lower concentration of white collar workers and a slightly higher percentage of services and a significantly higher percentage of blue collar workers.
- The neighborhood trade area and the community trade area's employed population function similarly, as compared to the City of Portland, as a whole.

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	6,220	6,546	6,761	10,214	10,750	11,117	237,307	253,528	263,909
Occupancy Rate	94.2%	92.6%	91.7%	94.3%	92.9%	92%	94.3%	92.6%	91.6%
Vacancy Rate	5.8%	7.4%	8.3%	5.7%	7.1%	8%	5.7%	7.4%	8.4%
Homeownership Rate	56.8%	58.1%	57.5%	60.1%	61.4%	60.5%	52.6%	53.6%	52.6%
Median Home Value	$129,171	$232,131	$274,550	$134,154	$239,672	$289,977	$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:

- In 2007, the homeownership rate in the neighborhood trade area is lower than that of the community trade area, but higher than the City of Portland.
- The neighborhood shows similar vacancy rates and a higher homeownership rate than the City of Portland. The homeownership rates between 2007 and 2012 are expected to go down in the neighborhood trade area, the community trade area, and the City of Portland.
- The neighborhood homeownership rate in 2007 is close to 60 percent, compared to the citywide rate of 54 percent.

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%	28.7%	28.1%	29.2%	28.6%	27.8%	23.8%	23%	22.2%
20 - 34	24.8%	22.4%	22.3%	25.2%	23.2%	23.4%	25.9%	23.9%	23.3%
35 - 64	36%	39.8%	40.1%	35.6%	39.1%	39.5%	38.8%	42%	43%
65+	10.1%	9.1%	9.5%	10%	9%	9.3%	11.5%	11%	11.5%
Median Age	32.7	34.3	34.8	32.4	33.7	34.3	35.2	36.9	38.1

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI 2005 population estimate and 2010 population forecast.

Findings:

- In 2000, the neighborhood and community trade area had a slightly higher percentage of young people (ages 0 – 19) than the citywide population. This trend is projected to continue through 2012.
- The elderly population in both the neighborhood area and the community area was less than the citywide population. While the percentage of elderly population in the City of Portland is projected to remain the same in 2012, the percentage of the elderly population is projected to decline in both the neighborhood area and the community area.
- Between 2000 and 2012, the median age in the neighborhood and community trade area is projected to increase by about two years, while the citywide median age is expected to increase 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: 2007Total Households by Household Income

	Neighborhood Trade Area		Community Trade Area		Portland	
ESRI 2005 Estimate	Number	Percent	Number	Percent	Number	Percent
Household Income Base	6,261	100%	11,141	100%	234,726	100%
< $15,000	682	10.9%	1,292	11.6%	28,167	12%
$15,000 - $24,999	639	10.2%	1,170	10.5%	21,125	9%
$25,000 - $34,999	589	9.4%	1,181	10.6%	25,585	10.9%
$35,000 - $49,999	1,008	16.1%	1,816	16.3%	36,852	15.7%
$50,000 - $74,999	1,528	24.4%	2,585	23.2%	46,710	19.9%
$75,000 - $99,999	1,021	16.3%	1,749	15.7%	33,096	14.1%
$100,000 - $149,999	595	9.5%	1,036	9.3%	24,646	10.5%
$150,000 - $199,999	150	2.4%	223	2%	10,328	4.4%
$200,000+	50	0.8%	78	0.7%	7,981	3.4%
Median Household Income	$60,588		$58,602		$69,766	
Average Household Income	$52,756		$50,752		$52,206	
Per Capita Income	$23,181		$22,663		$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 more middle-class households earning $35,000 to $99,999 than the City of Portland.
- At 21 percent and 22 percent, the percentage of low-income households in the neighborhood and community trade areas earning less than $25,000 is about the same as the citywide share of low-income households (21 percent).
- The neighborhood and community trade area have a greater share of households earning $50,000 to $99,999 a year, 41 percent and 39 percent, respectively, than the citywide share (34 percent).
- The neighborhood trade area had a smaller percentage of upper-income households earning over $150,000 (3.2 percent) compared to the community trade area (2.7 percent) and the City of Portland (7.8 percent). Since housing is more affordable in the neighborhood trade area, it is not surprising that fewer upper-income households live there.

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 neighborhood trade areas with a highly educated population; while others make locational decisions based on the trade area's high disposable income. Given that the percentage of 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 13: Educational Attainment, 2000

Educational Attainment	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total	10,041	100%	18,210	100%	363,851	100%
Less than 9th Grade	783	7.8%	1,439	7.9%	18,744	5%
9th - 12th Grade, No Diploma	1,195	11.9%	2,185	12%	33,382	9%
High School Graduate	2,902	28.9%	5,317	29.2%	80,947	22%
Some College, No Degree	2,540	25.3%	4,771	26.2%	90,825	25%
Associate Degree	592	5.9%	983	5.4%	21,255	6%
Bachelor's Degree	1,396	13.9%	2,495	13.7%	77,321	21%
Master's/Professional/Doctorate	643	6.4%	1,020	5.6%	41,377	11%

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

Findings:

- The neighborhood and community trade areas have a higher percentage of the population over age 25 who have not earned a high school diploma (19 percent and 20 percent respectively) than the City of Portland (14 percent).
- Advanced degrees are far less common in the neighborhood and community trade areas, where 6.4 percent of residents have earned a master's, professional, or doctorate degree, compared with 5.6 percent of the community trade area population and 11 percent of the Portland population.
- Only 20 percent of the neighborhood population earned a bachelor's degree or higher, compared to 19 percent of the community trade area and 32 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 14: Race and Ethnicity, 2006

Race or Ethnicity	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total Population	16,160	100%	29,732	100%	551,301	100%
White Alone	10,569	65.4%	19,587	65.9%	412,373	74.8%
Black or African American Alone	1.972	12.2%	3,359	11.3%	38,591	7%
American Indian Alone	275	1.7%	476	1.6%	5,513	1%
Asian and Pacific Islander Alone	1,131	7%	2,289	7.7%	44,655	8.1%
Some Other Race Alone	1,260	7.8%	2,200	4.7%	25,911	4.7%
Two or More Races	953	5.9%	1,813	6.1%	24,257	4.4%
Hispanic Origin	2,295	14.2%	4,191	14.1%	49,617	9%

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

Findings:

- The neighborhood trade area population is largely White (65 percent). However, it boasts a growing Hispanic origin (14 percent) and African-American (12 percent) population. The percentages of Hispanic and African-American populations in both the neighborhood and community trade areas are greater than the percentage of the City of Portland.
- The neighborhood trade area also has a higher percentage of the population that are of Black or African American origin (12 percent) than the community trade area (11 percent) and the City (7 percent).
- Both the neighborhood and the community trade areas have a lower proportion of Asian and Pacific Islanders than the City as a whole.

Business Environment

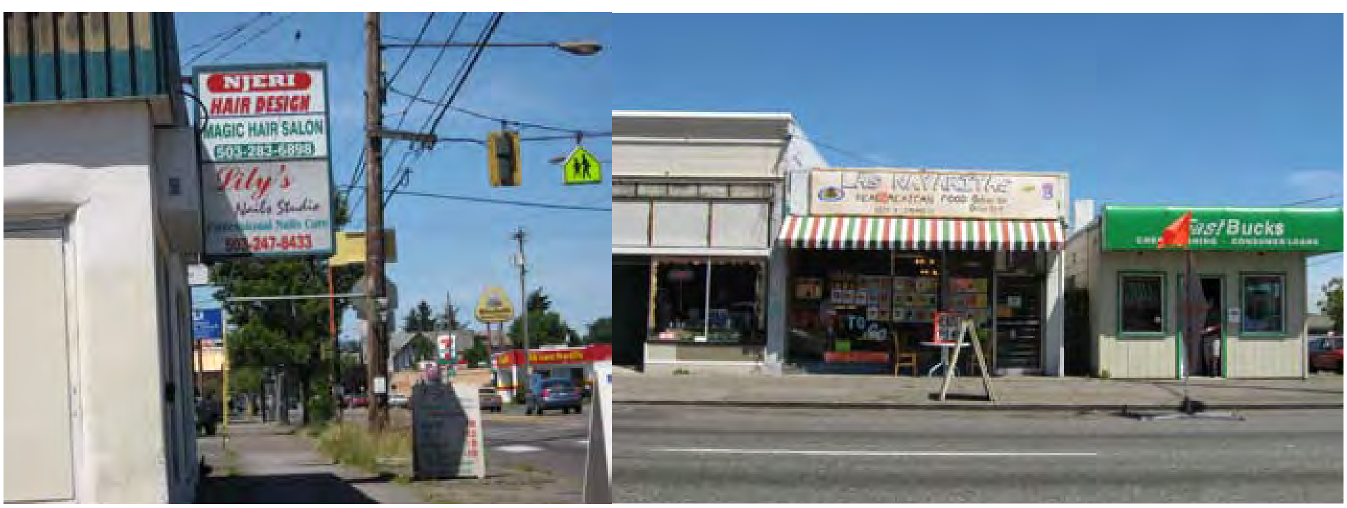
From a public perspective, crime and safety, while distinct from one another, are often viewed synonymously. The look and feel of a place, including the level of maintenance, lighting conditions, and the amount and types of business and street activity, can significantly influence public attitudes and 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

As shown in Table 15, the majority of business owners surveyed along the Corridor felt parking, roads, and building maintenance were the most important factors for the vitality of the corridor. The least important factors are also noted in the table.

Table 15: Factors Impacting the Vitality of the Corridor

Rank	Most Important	Least Important
1	Parking	Availability of Multi-Cultural Businesses/Activities
2	Roads	Variety of Restaurant/Entertainment Options
3	Maintained Buildings	Safe Pedestrian Environment



Examples of buildings that could benefit from a storefront improvement program.

While 34 percent of the business owner respondents rated the appearance of buildings along the corridor below average, most responded that neither their storefront nor interior require changes to attract more customers. Overall, more business owners would like to make changes to their storefront as opposed to their interior, with 33 percent desiring storefront improvements and 25 percent desiring interior improvements (See Figures 7 and 8). A storefront or Business enhancement program could be an option to help encourage revitalization of the Corridor.

Figure 7: Businesses that Desire Storefront Improvements

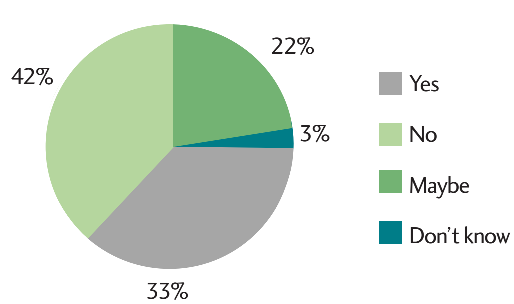
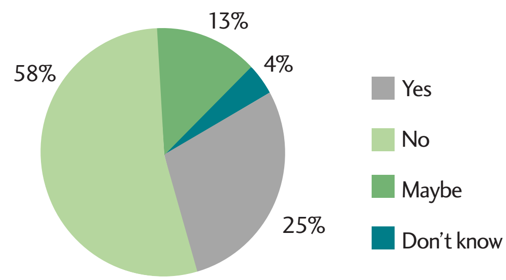


Figure 8: Businesses that Desire Interior Improvements



CRIME STATISTICS

Based on data from the Portland Police Bureau, Table 16 shows the number of crimes against persons and property as well as calls for service that occurred within the City of Portland and Lombard Street between 2000 and 2005. For the purpose of analyzing crime trends, Lombard Street includes census tracts located within a quarter mile radius of the Corridor. When comparing crime and calls for service activity for Lombard Street to the City, it is important to keep in mind that Lombard 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.

See Appendices D and E for detailed maps of Crime and Calls for Service on Lombard Street. See Appendices F and G for a detailed map of Crime and Calls for Service Citywide.

[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 16: 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	1	1	1	4	3	1	0	18	22	20	28	29	22	22%
Rape	23	21	23	10	12	13	-43%	369	305	354	310	313	325	-12%
Robbery	99	91	79	71	73	68	-31%	1,455	1,272	1,296	1,375	1,291	1,139	-22%
Aggravated assault	345	238	294	275	235	259	-49%	3,864	2,963	2,844	2,732	2,405	2,376	-39%
Total Person Crimes	**468**	**351**	**294**	**275**	**235**	**259**	**-45%**	**5,706**	**4,562**	**4,514**	**4,445**	**4,038**	**3,862**	**-32%**
CRIMES AGAINST PROPERTY														
Burglary	344	352	322	358	367	303	-12%	5,601	5,615	5,731	6,507	7,259	6,142	10%
Larceny	1,250	1,363	1,300	1,480	1,179	1,286	3%	25,063	28,457	28,052	29,748	28,452	25,941	4%
Motor vehicle theft	285	235	285	319	340	306	7%	4,782	4,765	5,255	5,982	6,052	5,834	22%
Arson	39	33	31	23	26	28	-28%	510	385	496	384	363	375	-26%
Total Property Crimes	**1,918**	**1,983**	**1,938**	**2,180**	**1,912**	**1,923**	**<1%**	**35,956**	**39,222**	**39,534**	**42,621**	**42,126**	**38,292**	**6%**
Total Crimes	**2,836**	**2,334**	**2,232**	**2,455**	**2,147**	**2,182**	**-9%**	**41,662**	**43,784**	**44,048**	**47,066**	**46,164**	**42,154**	**1%**
CALLS FOR SERVICE														
Dispatched	14,803	14,995	13,978	14,554	14,319	13,800	-7%	230,740	243,861	248,865	262,670	259,661	244,335	6%
Self-initiated	10,062	9,577	11,057	11,062	10,107	10,498	4%	202,811	176,363	185,261	192,184	173,269	189,861	-6%
Total Calls for Service	**24,865**	**24,572**	**25,035**	**25,616**	**24,426**	**24,298**	**-2%**	**433,551**	**420,224**	**434,126**	**454,854**	**432,930**	**434,196**	**0%**

Source: Portland Police Bureau, SQL Program 1/03/07
N Lombard Street area totals calculated using census tracts 41.02, 40.02, 40.01, 39.01, 38.01, 39.02, 38.02, and 37.01

Findings:

- Total crimes on Lombard Street and citywide both peaked in 2003 (2,455 crimes for Lombard crimes, 47,066 crimes Citywide). The trend upward may be the result of the 2003-2005 recession, which resulted in the highest unemployment rate in the nation at 7.3 percent for 2003.
- Between 2000 and 2005, crimes against persons on Lombard Street decreased by 45 percent overall, more than the 32 percent decrease citywide. The City experienced a steady decline in crimes against persons. Similarly, annual reported crimes against persons on Lombard Street followed a consistently downward trend from 2000 to 2004, with the trend reversing just slightly in 2005. Crimes against persons on Lombard Street increased by 10 percent between 2004 and 2005, in contrast to the City, where crimes against persons decreased by 4 percent during the same time.
- Total property crimes on Lombard Street peaked in 2003 (2,180 crimes). In 2003, the number of property crimes reported on Lombard was 12 percent higher than the previous year (1,938 crimes).
- Property crimes on Lombard Street increased less than one percent from 2000 to 2005. Within the property crime subgroup, decreases in arson and burglary crime rates decreased while larceny and motor vehicle theft rates increased.
- Calls for service on Lombard Street increased from 2001 to 2003 then decreased in 2004 and 2005.

Corridor Performance

Retail Gap Analysis

Gap analysis (or leakage analysis) is a technique for quantifying how well the current mix of retailers in any 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.

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 Lombard 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, which specialize in goods and services consumed and purchased on a frequent basis. Perishable goods such as food, flowers, baked goods and over-the-counter medicines are common examples of neighborhood goods. 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.

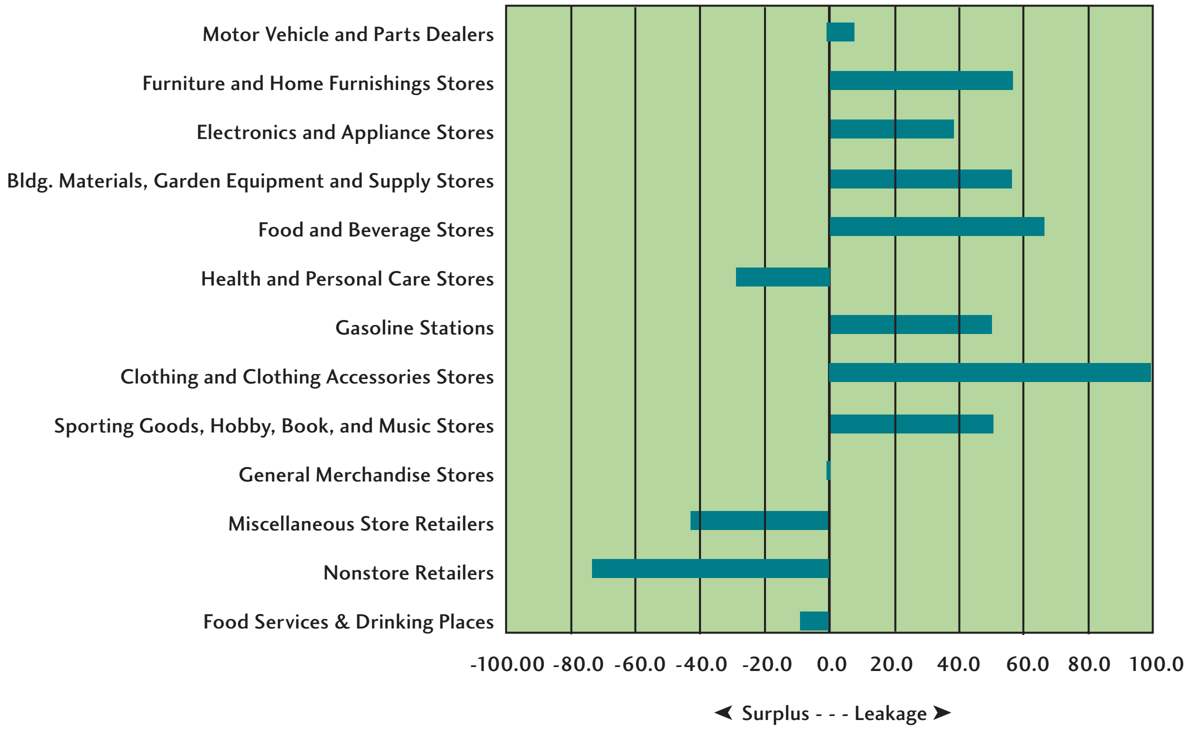
Table 17 calculates the overall leakage or surplus within the Retail Trade and Food and Drink industries. Figure 9 breaks down these aggregate amounts by industry sub sector.

Table 17: 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)	$148,978,527	$128,301,471	$20,677,056	7.5
Total Retail Trade (NAICS 44-45)	$128,580,260	$103,698,454	$24,881,806	10.7
Total Food & Drink (NAICS 722)	$20,398,267	$ 24,603,017	-$4,204,750	-9.3

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 2007, all rights reserved. ESRI estimates for 2007.

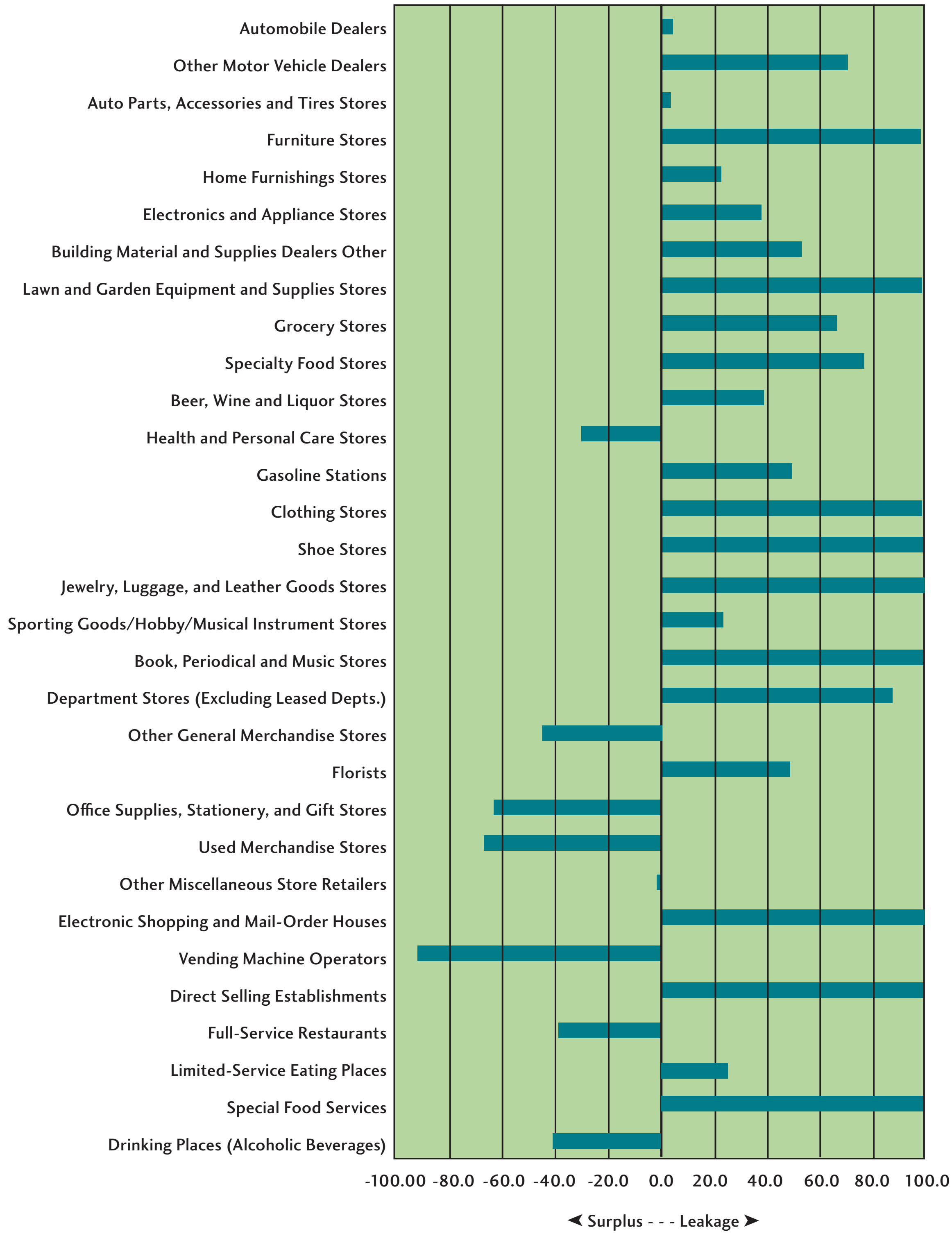
Findings:

- Retail sales leakage of $20,677,056 is reported within the broad Retail Trade and Food and Drink categories.
- At the neighborhood level there is significant retail leakage spread across many industry sub sectors. This may suggest that the demand for some neighborhood goods and services is not being met locally. Accordingly, the opportunity exists for current and future businesses along the Lombard Corridor to meet the underserved market by providing goods and services that residents currently shop for outside of the neighborhood trade area.
- Three industry sub sectors, Health and Personal Services Stores, Nonstore Retailers[6], and Misc.. Store Retailers, generated a retail surplus of approximately $30 million.

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.

[6]Nonstore retailers and Misc. Store Retailers include places such as orists, ofce supplies, used merchandise, electronic shopping and mail order businesses, and vending machine operators.

Figure 10: Leakage/Surplus Factor by Industry Group



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

Findings:

- There is significant leakage in many of the industry groups, such as clothing, shoe, grocery, and specialty food. Market potential exists for these businesses as well as others such as book, periodical and music stores within the neighborhood trade area.
- Other retail potential exists; however, this potential exists for businesses not typically classified as neighborhood retailers (e.g. Building Materials and Supplies Dealers, Lawn and Garden Equipment and Supplies Dealers, Electronics and Appliance Stores, and Sporting Goods/Hobby/Musical Instrument Stores). These businesses generally serve larger trade areas and are therefore discussed in the community trade area findings.
- The results of the business owner surveys generally support the findings of the neighborhood gap analysis. When asked to identify businesses that would complement their business, 20 percent of business owners indicated a hardware store, 18 percent indicated a specialty grocer, and 14 percent said an office supply store was needed.

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

COMMUNITY TRADE AREA GAP ANALYSIS

Table 18 identifies leakage patterns within the Retail Trade and Food and Drink industries for the community trade area.

Table 18: 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)	$ 320,229,333	$256,819,950	-11.0	-$63,409,383
Total Retail Trade (NAICS 44-45)	$281,051,317	$ 221,582,545	-$71,852,503	-$59,468,772
Total Food & Drink (NAICS 722)	$ 39,178,016	$ 35,237,405	-5.3	$3,940,611

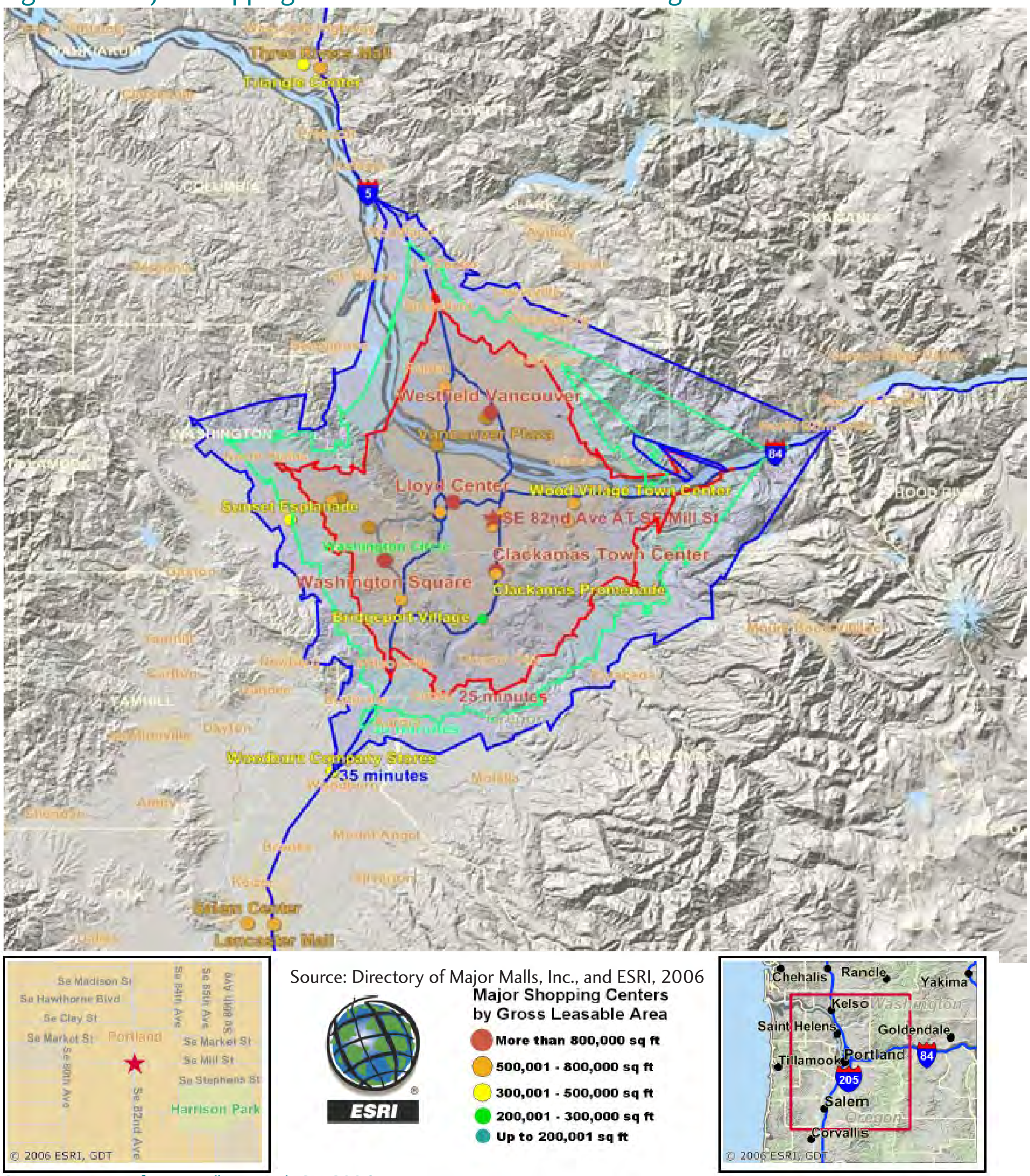
Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2005.

Findings:

- No retail sales leakage is reported within the Retail Trade and Food and Drink industries (NAICS 44-45, 722). On the contrary, a surplus of $63,409,383 can be found along the corridor. This suggests that the community trade area, which has nearly two times the number of households as the neighborhood trade area and contains an estimated five percent of the citywide population, is, overall, a stable retail marketplace.
- Unlike the neighborhood trade area, the community trade area features two large format retailers that anchor both ends of the corridor on Interstate and Carey Avenue. 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 35-minute drive-time of the center point of the 82nd Avenue Corridor.

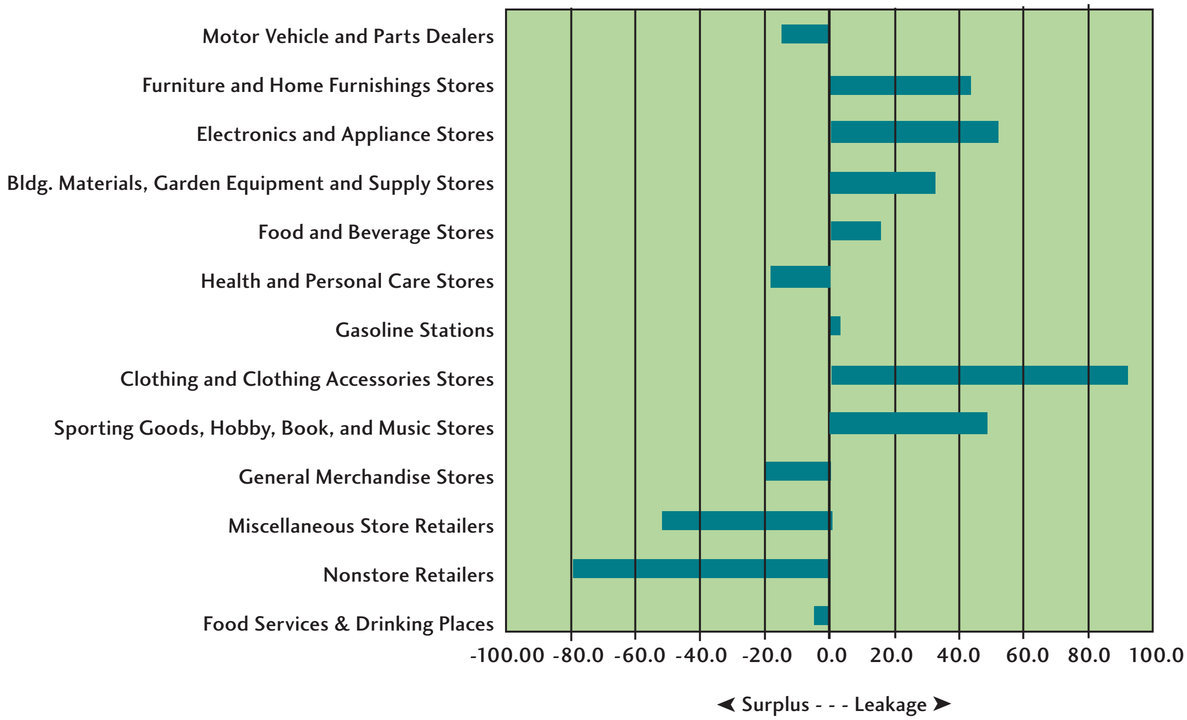
Figure 11: Major Shopping Centers in the Portland Metro Region



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)

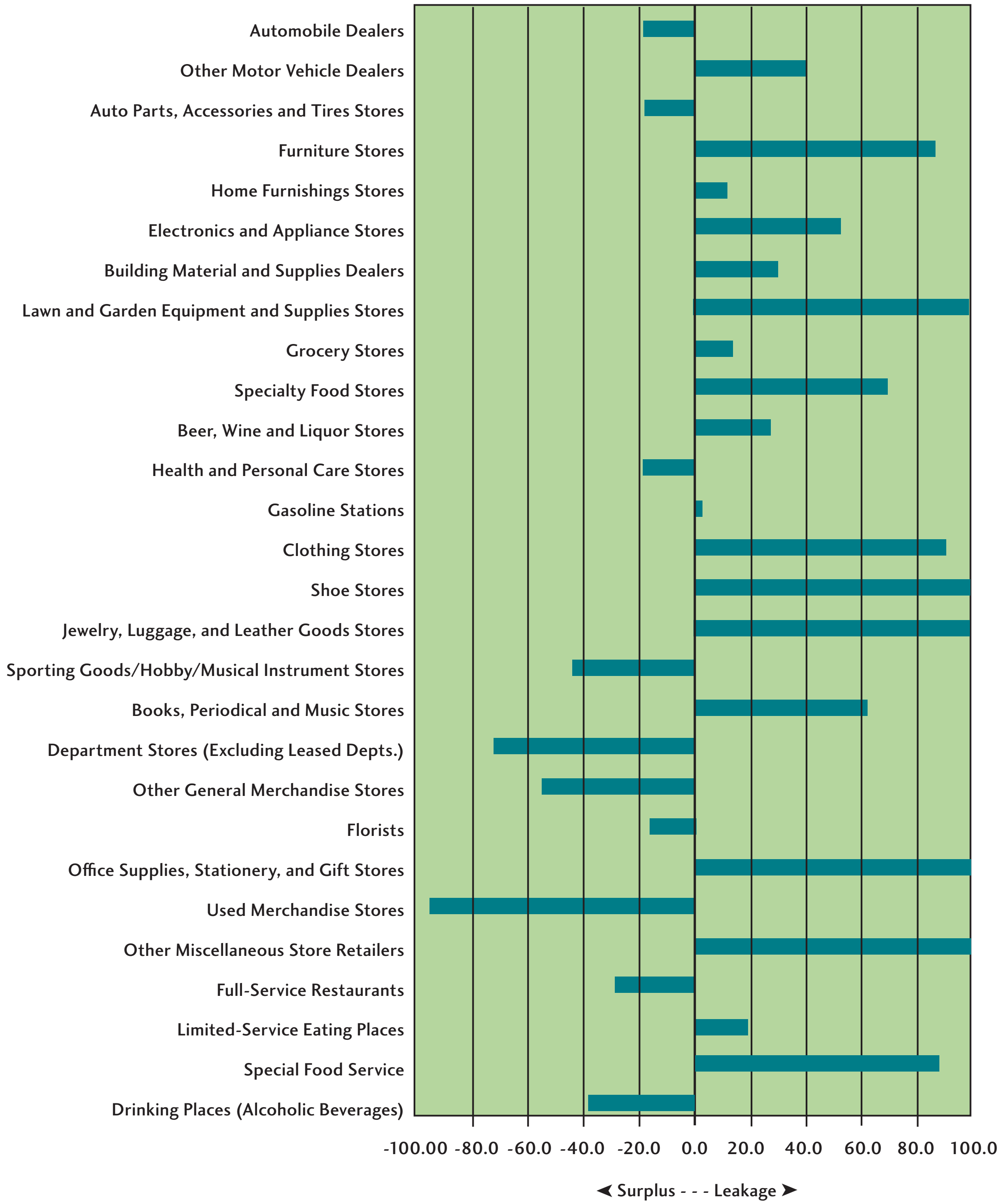


Source: Business data provided by InfoUSA, Omaha NE, copyright 2007, All rights reserved. ESRI estimates for 2007.

Findings:

- In 2007, the Food Services and Drinking Places, Non-Store Retailers, Miscellaneous Store Retailers, General Merchandise Stores, Health and Personal Care, and Motor Vehicle and Parts Dealers industry sub sectors outperformed other sub sectors in the community trade area. These sub sectors generated a $243,039,257 retail surplus.
- On the other hand, retail demand still exists for home goods, food and beverage, and clothing stores.

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



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

Findings:

- Existing businesses within the community trade area do not satisfy all of the consumer needs of area households.
- Nevertheless, several industry groups – Office Supplies, Stationary and Gift Stores, Department Stores, Sporting Goods/ Hobby/ Musical Instrument Stores, Health & Personal Care Stores, Grocery Stores, Home Furnishings Stores, Other Motor Vehicle Dealers, Special Food Services, and Full-Service Restaurants – experienced a retail surplus in 2005.
- Books, Periodical, and Music Stores and Electronics & Appliance Stores are the two industry sub sectors experiencing the greatest retail leakage in the Lombard community trade area.

COMPETITIVE STRENGTHS AND WEAKNESSES

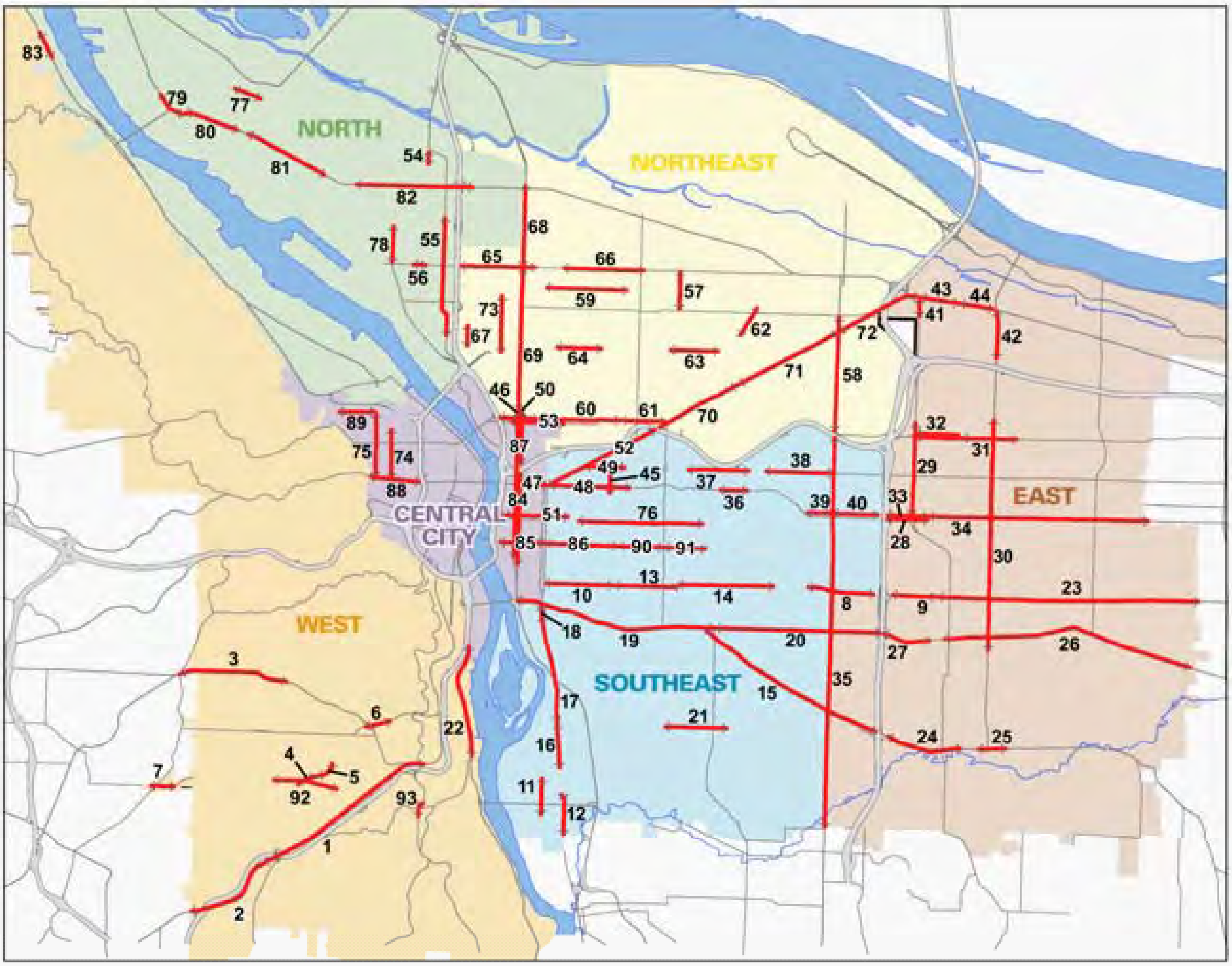
In addition to analyzing retail leakage, the overall performance of the Corridor was assessed in Figure 14 by identifying internal strengths and weaknesses as well as external market opportunities and threats (a conventional SWOT analysis).

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

	Strengths / Opportunities	Weaknesses / Threats
INTERNAL	**Strengths** • Redevelopment potential: vacant parcels and storefronts • Mexican niche-market businesses • Religious institution presence • Columbia Park - green space • High traffic volume and visibility • Several building and business remodelings occurring: improved streetscape • $6 million investment by De La Salle North Catholic High School for site improvement • Small minority-owned businesses • Commercial retail affordability • Business owners are often local residents and leaders in the community • Transportation options: close to MAX and multiple bus lines • Long-term independent businesses: know history of corridor	**Weaknesses** • Lack of street parking in sections of commercial corridor and lack of parking in general • NPBA is more representative of St. Johns • Auto-oriented, but with pedestrian potential • Unattractive storefronts and vandalism • Dispersed commercial development • Many diverse businesses, but not all thriving • Transportation issues (pedestrian crossings) • Aesthetically unappealing and no street trees • Poorly maintained roads • Fast moving traffic • Some vacant storefronts • Underutilized parcels • Limited grocery options • Possible lack of family wage jobs • Crime and perception of "seediness" • Too many bars, check cashing, title loan shops • Lacking entertainment options/ culture
EXTERNAL	**Opportunities** • Can look toward revitalization efforts at Hollywood, St. Johns, and Kenton for inspiration • Population and income growth • Proximity to University of Portland, could serve as a partner in community economic revitalization • Proximity to industrial districts • Proximity to other corridors, close to I-5 and I-84, within a reasonable distance of major roadways • Public-private partnerships, i.e. De La Salle • Private investment, i.e. Fred Meyer • Mixed-use redevelopment • Attract entrepreneurs to the area, i.e. Vulcan • Marketing, branding • Provide connection between residents from different social and economic background • Nodal development • Proximity to thriving neighborhoods, such as	**Threats** • Competition from nearby corridors • Competition from big box retailers • Infrastructure projects currently underway • Lack of capital for redevelopment • Perception of disproportionate low-income population • State highway designation • Limited business assistance resources • Real estate market slow down • Street network of surrounding neighborhoods • Development community more focused on central city area • Confusing intersections/ transportation • Lacks direct freeway access, which discourages some businesses from locating there

Appendix A:

CITY OF PORTLAND 93 CORRIDORS MAP



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

Appendix B:

BUSINESS SURVEY

The City of Portland is developing a market study of your business district. We would like your assistance in creating 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 ________________

Name of Business ____

Name of Business Owner____

Business Address ____

Type of Business (restaurant, dry cleaner, etc.) __________________________

How long have you been in business? ______________

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. **Hours of Operation (Please complete as appropriate.)**

Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

5. **Number of full-time employees** ______ **Number of part-time employees** ______
6. **How far from the business district do the majority of the employees live?**
   1-5 miles ☐ 5-10 miles ☐ 10-15 miles ☐ 15+ miles ☐
7. **Where do your employees typically park?**
   On-site ☐ On the street ☐ Don't need parking ☐ Other ☐
8. **How do your employees typically get to work?**
   Drive ☐ Carpool ☐ Use public transportation ☐ Bike ☐ Walk ☐
9. **What is/are the busiest sales day(s) of the week?**
   Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday ☐

10. What is/are the busiest sales time(s) of the day?

9-11 am ☐ 11 am-1 pm ☐ 1-3 pm ☐ 3-5 pm ☐ 5-7 pm ☐ Other ___________

11. What are the THREE busiest sales months of the year?

January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July ☐ August ☐
September ☐ October ☐ November ☐ December ☐

12. When do you typically plan major sales/specials for your business? (Check all that apply).

January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July ☐ August ☐
September ☐ October ☐ November ☐ December ☐

13. Of the characteristics listed, which do you feel are the most important for the health and vitality of your corridor (business district)?

Criteria - check all that apply

Selection of products	☐	Appearance of signs	☐
Selection of services	☐	Cleanliness	☐
Shopping hours	☐	Safety	☐
Quality of businesses	☐	Number of events and promotions	☐
Number of parking spaces	☐	Traffic circulation	☐
Customer service	☐	Loading zones	☐
Places to eat	☐	Entertainment/culture	☐
Prices of goods	☐	Appearance of buildings	☐

14. How satisfied are you with your present location?

Very Satisfied ☐ Satisfied ☐ Neutral ☐ Unsatisfied ☐ Very Unsatisfied ☐ Plan to Move ☐

15. Do you have plans to expand, reduce or relocate this business in the foreseeable future?

☐ Expand ☐ Reduce
☐ Relocate: Within Portland ☐ Outside of Portland ☐ Other ______________________
☐ None of the above

15a. If you have plans to expand, reduce or relocate, have you encountered any barriers?

☐Yes: Employment ☐ Financing ☐ Regulatory ☐ Structural ☐ Zoning ☐ Other _____
☐No

16. Over the past five years has your business:

Improved ☐ Stayed the same ☐ Declined ☐

Please explain.

17. How many jobs did this business provide in 2005, including owners that work at the business?

1–2 ☐ 2–5 ☐ 5–10 ☐ 10–25 ☐ 25+ ☐

18. Please select any of the following business challenges you are currently dealing with.

No problems	☐	Utility costs/availability	☐	Difficulty recruiting staff	☐
Financing	☐	Product costs/availability	☐	Difficulty retaining staff	☐
Shoplifting, theft	☐	In-city competition	☐	Health insurance costs	☐
Personnel Costs	☐	Out-of-city competition	☐	Vandalism	☐
Shipping/transport costs	☐	Taxes, business fees	☐	Government regulations	☐
Other (Please list)	☐				

19. Please rate your corridor (business district) on the following criteria.

Criteria	Excellent	Good	Average	Fair	Poor
Selection of products	☐	☐	☐	☐	☐
Selection of services	☐	☐	☐	☐	☐
Convenient store hours	☐	☐	☐	☐	☐
Number of parking spaces	☐	☐	☐	☐	☐
Customer service	☐	☐	☐	☐	☐
Places to eat	☐	☐	☐	☐	☐
Entertainment/culture	☐	☐	☐	☐	☐
Prices of goods	☐	☐	☐	☐	☐
Appearance of buildings	☐	☐	☐	☐	☐
Appearance of signs	☐	☐	☐	☐	☐
Cleanliness	☐	☐	☐	☐	☐
Safety/Crime	☐	☐	☐	☐	☐
Number of events and promotions	☐	☐	☐	☐	☐
Traffic circulation	☐	☐	☐	☐	☐
Quality of businesses	☐	☐	☐	☐	☐

20. Do you feel your *storefront* requires changes to attract more customers?

Yes ☐ No ☐ Maybe ☐ Don't know ☐

20a. If yes, what improvements would you make or like to make?

Clean up ☐ Paint ☐ Signage ☐ Awnings ☐ Remodel ☐ Other ____________________

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

Yes ☐ No ☐ Maybe ☐ Don't know ☐

21a. If yes, what changes would you make or like to make?

Access ☐ Paint ☐ Products ☐ Remodel ☐ Signage ☐ Other ____________________

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

23. Did you know there's a Business Association for businesses in this district?

Yes ☐ No ☐

24. What kinds of services would you be interested in from the Business Association?

(Check all that apply.)

Group Promotions/Advertising ☐ Legal Assistance ☐ Window Display Assistance ☐
Translation Services ☐ Tax Advice ☐ Banking Assistance ☐ Financial Planning ☐
Business Planning ☐ Other ___________________

25. From the following list of businesses, select FIVE that you feel would compliment your business and should be located within the business district.

Toy Store	☐	Coffee/Sandwich Shop	☐	Jeweler	☐	Accountant	☐
Bookstore	☐	CD/Record Store	☐	Antique Store	☐	Bike Store	☐
Florist	☐	Furniture Store	☐	Health Food Store	☐	Photography Store	☐
Attorney	☐	Hardware Store	☐	Dry Cleaner	☐	Hobby Store	☐
Greeting Card Store	☐	Shoe Store	☐	Drug Store	☐	Bakery	☐
Garden Center	☐	Advertising Firm	☐	Barber	☐	Craft Store	☐
Shoe Repair	☐	Sporting Goods Store	☐	Lodging	☐	Discount Store	☐
Print Shop	☐	Grocery Store	☐	Fresh Food Market	☐	Optical Goods Store	☐
Clothing Store	☐	Leather Goods Store	☐	Musical Supply Store	☐	Office Supply Store	☐
Pet Supply Store	☐	Florist	☐	Medical Office	☐	Recreation Facility	☐

Thank you for your time! City of Portland employees will return to your place of business within seven business days to pick up the completed survey. If you wish to return the survey yourself, please mail it to:

City of Portland, Bureau of Planning
Attn: Alma Flores
1900 SW Fourth Avenue, Suite 7100
Portland, OR 97201-5380

Appendix C:

DEMOGRAPHIC AND HOUSING DATA

Demographic and Income Profile

Prepared by Alma Flores

Lombard and Hereford | **Latitude:** 45.581912
Longitude: -122.722528
Portland, OR 97203 | **Site Type:** Radius | **Radius:** 1.0 mile

Summary	**2000**	**2007**	**2012**
Population	17,012	17,592	18,002
Households	5,861	6,066	6,202
Families	3,782	3,882	3,925
Average Household Size	2.70	2.70	2.71
Owner Occupied HUs	3,535	3,802	3,886
Renter Occupied HUs	2,326	2,262	2,316
Median Age	29.7	30.1	31.2

Trends: 2007-2012 Annual Rate	**Area**	**State**	**National**
Population	0.46%	1.31%	1.22%
Households	0.45%	1.33%	1.27%
Families	0.22%	1.13%	1.00%
Owner HHs	0.44%	1.29%	1.29%
Median Household Income	3.75%	3.34%	3.29%

	2000		**2007**		**2012**	
Households by Income	Number	Percent	Number	Percent	Number	Percent
< $15,000	1,086	18.4%	872	14.4%	734	11.8%
$15,000 - $24,999	864	14.7%	682	11.2%	554	8.9%
$25,000 - $34,999	730	12.4%	563	9.3%	566	9.1%
$35,000 - $49,999	1,175	19.9%	936	15.4%	720	11.6%
$50,000 - $74,999	1,344	22.8%	1,404	23.2%	1,360	21.9%
$75,000 - $99,999	481	8.2%	940	15.5%	924	14.9%
$100,000 - $149,999	171	2.9%	524	8.6%	974	15.7%
$150,000 - $199,999	16	0.3%	104	1.7%	259	4.2%
$200,000+	26	0.4%	39	0.6%	111	1.8%
Median Household Income	$38,050		$49,661		$59,705	
Average Household Income	$42,456		$56,544		$68,648	
Per Capita Income	$15,147		$20,673		$24,838	

	2000		**2007**		**2012**	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	1,275	7.5%	1,355	7.7%	1,407	7.8%
5 - 9	1,294	7.6%	1,196	6.8%	1,237	6.9%
10 - 14	1,159	6.8%	1,239	7.0%	1,122	6.2%
15 - 19	1,777	10.4%	1,861	10.6%	1,886	10.5%
20 - 24	1,776	10.4%	1,614	9.2%	1,790	9.9%
25 - 34	2,568	15.1%	2,724	15.5%	2,661	14.8%
35 - 44	2,474	14.5%	2,323	13.2%	2,264	12.6%
45 - 54	1,962	11.5%	2,256	12.8%	2,230	12.4%
55 - 64	1,111	6.5%	1,515	8.6%	1,816	10.1%
65 - 74	776	4.6%	723	4.1%	851	4.7%
75 - 84	634	3.7%	527	3.0%	472	2.6%
85+	208	1.2%	269	1.5%	266	1.5%

	2000		**2007**		**2012**	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	11,505	67.6%	11,220	63.0%	11,001	61.1%
Black Alone	1,765	10.4%	1,883	10.7%	1,946	10.8%
American Indian Alone	290	1.7%	276	1.6%	265	1.5%
Asian Alone	1,102	6.5%	1,337	7.6%	1,502	8.3%
Pacific Islander Alone	121	0.7%	134	0.8%	145	0.8%
Some Other Race Alone	1,281	7.5%	1,705	9.7%	2,055	11.4%
Two or More Races	948	5.6%	1,029	5.8%	1,089	6.0%
Hispanic Origin (Any Race)	2,336	13.7%	3,087	17.5%	3,693	20.5%

Data Note: Income is expressed in current dollars.

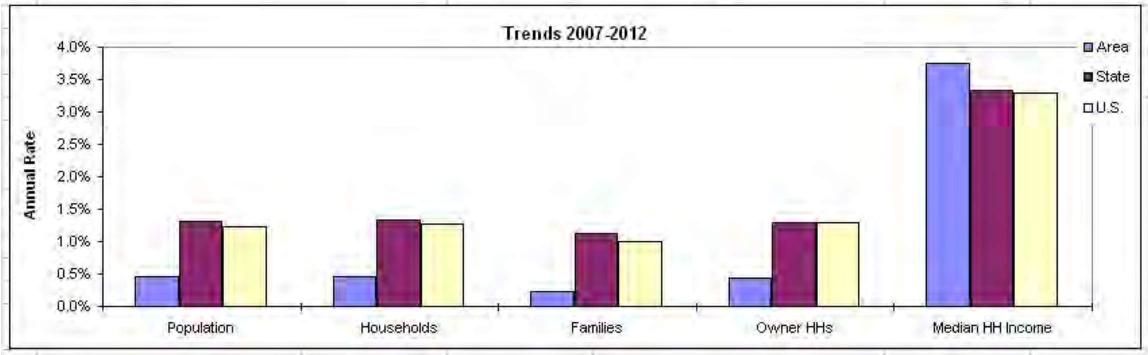
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2007 and 2012.

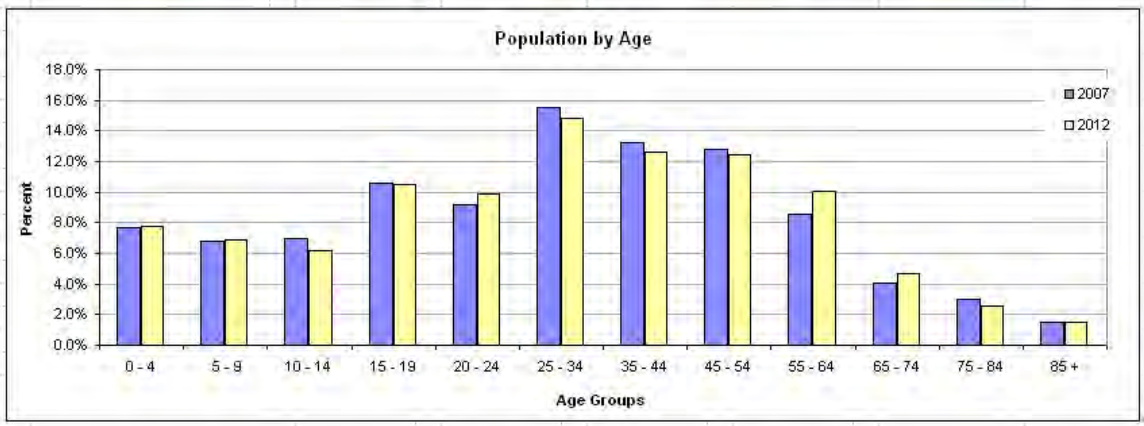
 Phone: 800-795-7483 • www.esri.com/bao 10/22/2007

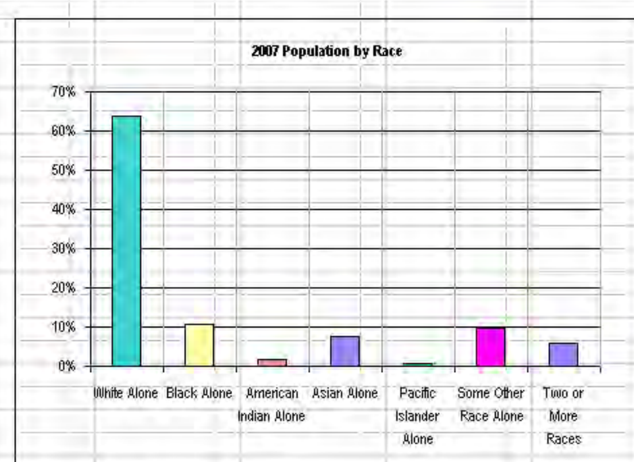
Demographic and Income Profile

Prepared by Alma Flores

Lombard and Hereford		Latitude: 45.581912
		Longitude: -122.722528
Portland, OR 97203	Site Type: Radius	Radius: 1.0 mile







Source: ESRI forecasts for 2007 and 2012.

 Phone: 800-795-7483 • www.esri.com/bao 10/22/2007

Demographic and Income Profile

					Prepared by Alma Flores	
Lombard and Hereford					**Latitude:**	45.581912
					Longitude:	-122.722528
Portland, OR 97203		**Site Type:**	**Radius**		**Radius:**	1.5 mile
Summary		2000		2007		2012
Population		26,758		27,682		28,366
Households		9,628		9,982		10,223
Families		6,110		6,277		6,352
Average Household Size		2.65		2.65		2.65
Owner Occupied HUs		6,137		6,601		6,722
Renter Occupied HUs		3,491		3,381		3,501
Median Age		31.4		32.2		33.0

Trends: 2007-2012 Annual Rate	Area	State	National
Population	0.49%	1.31%	1.22%
Households	0.48%	1.33%	1.27%
Families	0.24%	1.13%	1.00%
Owner HHs	0.36%	1.29%	1.29%
Median Household Income	3.75%	3.34%	3.29%

	2000		2007		2012	
Households by Income	Number	Percent	Number	Percent	Number	Percent
< $15,000	1,618	16.7%	1,233	12.4%	1,026	10.0%
$15,000 - $24,999	1,390	14.4%	1,025	10.3%	841	8.2%
$25,000 - $34,999	1,266	13.1%	1,014	10.2%	893	8.7%
$35,000 - $49,999	1,944	20.1%	1,594	16.0%	1,286	12.6%
$50,000 - $74,999	2,289	23.7%	2,392	24.0%	2,315	22.6%
$75,000 - $99,999	809	8.4%	1,576	15.8%	1,534	15.0%
$100,000 - $149,999	292	3.0%	887	8.9%	1,670	16.3%
$150,000 - $199,999	32	0.3%	192	1.9%	458	4.5%
$200,000+	36	0.4%	68	0.7%	199	1.9%
Median Household Income	$38,886		$51,017		$61,318	
Average Household Income	$43,105		$58,081		$70,756	
Per Capita Income	$15,982		$21,657		$26,290	

	2000		2007		2012	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	2,018	7.5%	2,118	7.7%	2,181	7.7%
5 - 9	2,007	7.5%	1,920	6.9%	1,944	6.9%
10 - 14	1,826	6.8%	1,925	7.0%	1,831	6.5%
15 - 19	2,377	8.9%	2,519	9.1%	2,542	9.0%
20 - 24	2,462	9.2%	2,192	7.9%	2,480	8.7%
25 - 34	4,206	15.7%	4,263	15.4%	4,102	14.5%
35 - 44	4,125	15.4%	3,975	14.4%	3,797	13.4%
45 - 54	3,251	12.2%	3,748	13.5%	3,806	13.4%
55 - 64	1,825	6.8%	2,493	9.0%	3,052	10.8%
65 - 74	1,290	4.8%	1,235	4.5%	1,398	4.9%
75 - 84	1,038	3.9%	866	3.1%	799	2.8%
85+	332	1.2%	427	1.5%	433	1.5%

	2000		2007		2012	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	18,378	68.7%	17,982	65.0%	17,658	62.3%
Black Alone	2,673	10.0%	2,872	10.4%	2,992	10.5%
American Indian Alone	496	1.9%	477	1.7%	462	1.6%
Asian Alone	1,664	6.2%	2,029	7.3%	2,295	8.1%
Pacific Islander Alone	187	0.7%	207	0.7%	224	0.8%
Some Other Race Alone	1,827	6.8%	2,441	8.8%	2,956	10.4%
Two or More Races	1,533	5.7%	1,674	6.0%	1,779	6.3%
Hispanic Origin (Any Race)	3,356	12.5%	4,452	16.1%	5,360	18.9%

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 Alma Flores

Lombard and Hereford		Latitude:	45.581912
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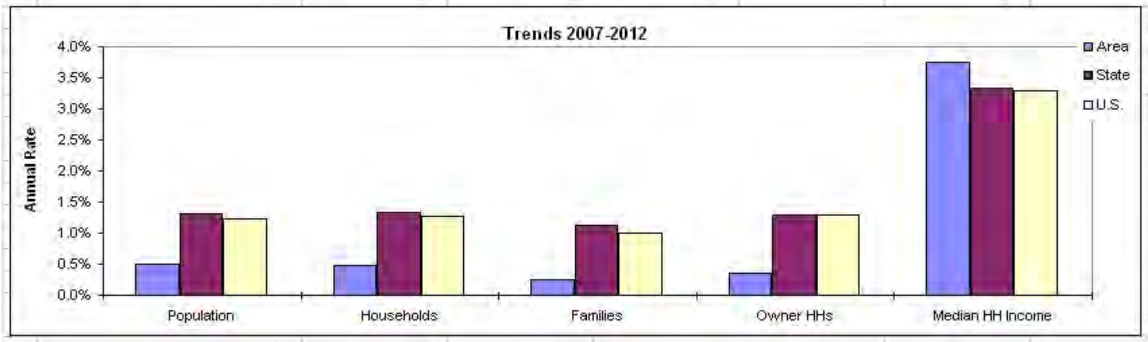
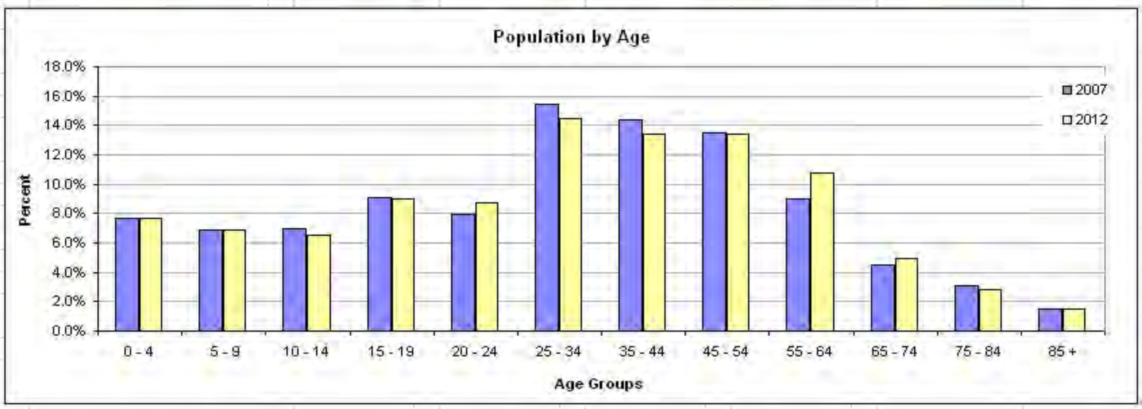
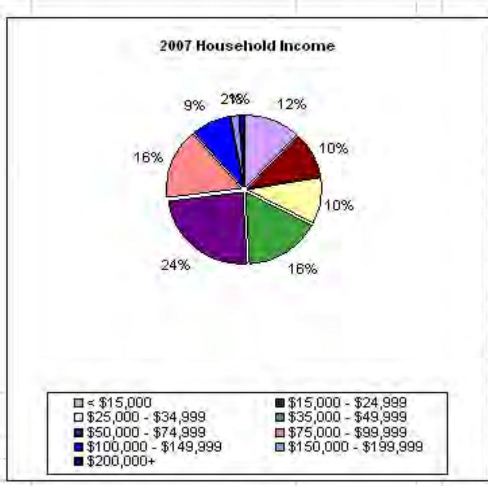
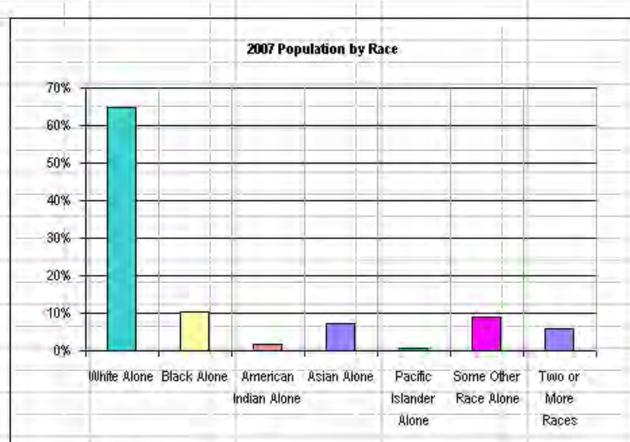








2007 Percent Hispanic Origin 16%

Source: ESRI forecasts for 2007 and 2012.

Housing Profile

Prepared by Alma Flores

Lombard-final		Latitude:	45.577132
N Lombard St and N Chautauqua Blvd		Longitude:	-122.707959
Portland, OR 97203	Site Type: Radius	Radius:	1.0 mile

2000 Total Population	15,900	2000 Median HH Income	$40,714
2007 Total Population	16,160	2007 Median HH Income	$52,756
2012 Total Population	16,451	2012 Median HH Income	$63,144
2007-2012 Annual Rate	0.36%	2007-2012 Annual Rate	3.66%

Housing Units by Occupancy Status and Tenure

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	6,484	100.0%	6,704	100.0%	6,880	100.0%
Occupied	6,142	94.7%	6,261	93.4%	6,368	92.6%
Owner	4,053	62.5%	4,271	63.7%	4,310	62.6%
Renter	2,089	32.2%	1,990	29.7%	2,058	29.9%
Vacant	342	5.3%	443	6.6%	512	7.4%

Owner Occupied Housing Units by Value

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total	4,051	100.0%	4,270	100.0%	4,310	100.0%
< $10,000	0	0.0%	0	0.0%	0	0.0%
$10,000 - $14,999	0	0.0%	0	0.0%	0	0.0%
$15,000 - $19,999	6	0.1%	0	0.0%	0	0.0%
$20,000 - $24,999	14	0.3%	0	0.0%	0	0.0%
$25,000 - $29,999	0	0.0%	2	0.0%	0	0.0%
$30,000 - $34,999	5	0.1%	4	0.1%	1	0.0%
$35,000 - $39,999	10	0.2%	9	0.2%	2	0.0%
$40,000 - $49,999	12	0.3%	10	0.2%	9	0.2%
$50,000 - $59,999	60	1.5%	3	0.1%	6	0.1%
$60,000 - $69,999	73	1.8%	10	0.2%	1	0.0%
$70,000 - $79,999	73	1.8%	12	0.3%	4	0.1%
$80,000 - $89,999	209	5.2%	8	0.2%	6	0.1%
$90,000 - $99,999	362	8.9%	47	1.1%	8	0.2%
$100,000 - $124,999	1,050	25.9%	107	2.5%	49	1.1%
$125,000 - $149,999	1,181	29.2%	168	3.9%	92	2.1%
$150,000 - $174,999	514	12.7%	379	8.9%	113	2.6%
$175,000 - $199,999	265	6.5%	558	13.1%	291	6.8%
$200,000 - $249,999	114	2.8%	1,320	30.9%	1,073	24.9%
$250,000 - $299,999	53	1.3%	942	22.1%	1,068	24.8%
$300,000 - $399,999	35	0.9%	523	12.2%	1,083	25.1%
$400,000 - $499,999	1	0.0%	97	2.3%	355	8.2%
$500,000 - $749,999	6	0.1%	58	1.4%	104	2.4%
$750,000 - $999,999	1	0.0%	2	0.0%	33	0.8%
$1,000,000 +	7	0.2%	11	0.3%	12	0.3%
Median Value	$128,207		$230,985		$273,408	
Average Value	$135,019		$244,422		$296,140	

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

Lombard-final
N Lombard St and N Chautauqua Blvd
Portland, OR 97203

Site Type: **Radius**

Prepared by Alma Flores
Latitude: 45.577132
Longitude: -122.707959
Radius: 1.0 mile

Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	342	100.0%
For Rent	150	43.9%
For Sale Only	85	24.9%
Rented/Sold, Unoccupied	46	13.5%
Seasonal/Recreational/Occasional Use	8	2.3%
For Migrant Workers	0	0.0%
Other Vacant	53	15.5%

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

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	6,140	4,052	66.0%
15 - 24	350	59	16.9%
25 - 34	1,239	662	53.4%
35 - 44	1,429	925	64.7%
45 - 54	1,268	913	72.0%
55 - 64	679	518	76.3%
65 - 74	513	404	78.8%
75 - 84	475	412	86.7%
85+	187	159	85.0%

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

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	6,141	4,053	66.0%
White Alone	4,734	3,380	71.4%
Black Alone	637	292	45.8%
American Indian Alone	87	38	43.7%
Asian Alone	213	132	62.0%
Pacific Islander Alone	37	16	43.2%
Some Other Race Alone	213	85	39.9%
Two or More Races	220	110	50.0%
Hispanic Origin	397	163	41.1%

Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	6,485	100.0%	6,134	100.0%
1, Detached	5,323	82.1%	5,067	82.6%
1, Attached	143	2.2%	121	2.0%
2	278	4.3%	260	4.2%
3 to 4	298	4.6%	285	4.6%
5 to 9	101	1.6%	79	1.3%
10 to 19	167	2.6%	162	2.6%
20 to 49	131	2.0%	116	1.9%
50 or More	32	0.5%	32	0.5%
Mobile Home	12	0.2%	12	0.2%
Other	0	0.0%	0	0.0%

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 Alma Flores

Lombard-final		Latitude:	45.577132
N Lombard St and N Chautauqua Blvd		Longitude:	-122.707959
Portland, OR 97203	Site Type: Radius	Radius:	1.0 mile

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

	Number	Percent
Total	3,903	100.0%
With Mortgage	2,901	74.3%
< $200	0	0.0%
$200 - $299	7	0.2%
$300 - $399	42	1.1%
$400 - $499	70	1.8%
$500 - $599	158	4.0%
$600 - $699	201	5.1%
$700 - $799	312	8.0%
$800 - $899	269	6.9%
$900 - $999	344	8.8%
$1000 - $1249	783	20.1%
$1250 - $1499	422	10.8%
$1500 - $1999	260	6.7%
$2000 - $2499	25	0.6%
$2500 - $2999	7	0.2%
$3000+	1	0.0%
With No Mortgage	1,002	25.7%
Median Monthly Owner Costs for Units with Mortgage	$1,015	
Average Monthly Owner Costs for Units with Mortgage	$1,040	

Census 2000 Specified Renter Occupied Housing Units by Contract Rent

	Number	Percent
Total	2,085	100.0%
Paying Cash Rent	2,015	96.6%
< $100	122	5.9%
$100 - $149	68	3.3%
$150 - $199	51	2.4%
$200 - $249	80	3.8%
$250 - $299	74	3.5%
$300 - $349	92	4.4%
$350 - $399	149	7.1%
$400 - $449	138	6.6%
$450 - $499	149	7.1%
$500 - $549	152	7.3%
$550 - $599	189	9.1%
$600 - $649	127	6.1%
$650 - $699	148	7.1%
$700 - $749	94	4.5%
$750 - $799	156	7.5%
$800 - $899	154	7.4%
$900 - $999	54	2.6%
$1000 - $1249	18	0.9%
$1250 - $1499	0	0.0%
$1500 - $1999	0	0.0%
$2000 +	0	0.0%
No Cash Rent	70	3.4%
Median Rent	$528	
Average Rent	$505	
Average Gross Rent (with Utilities)	$627	

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 Contract Rent and Average Gross Rent exclude units paying no cash rent.
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Housing Profile

Prepared by Alma Flores

Lombard-final		Latitude:	45.577132
N Lombard St and N Chautauqua Blvd		Longitude:	-122.707959
Portland, OR 97203	Site Type: Radius	Radius:	1.5 mile

2000 Total Population	29,118	2000 Median HH Income	$39,083
2007 Total Population	29,724	2007 Median HH Income	$50,752
2012 Total Population	30,283	2012 Median HH Income	$60,832
2007-2012 Annual Rate	0.37%	2007-2012 Annual Rate	3.69%

Housing Units by Occupancy Status and Tenure

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	11,482	100.0%	11,920	100.0%	12,251	100.0%
Occupied	10,878	94.7%	11,141	93.5%	11,348	92.6%
Owner	7,027	61.2%	7,448	62.5%	7,528	61.4%
Renter	3,851	33.5%	3,693	31.0%	3,820	31.2%
Vacant	604	5.3%	779	6.5%	903	7.4%

Owner Occupied Housing Units by Value

	Census 2000		2007		2012	
	Number	Percent	Number	Percent	Number	Percent
Total	7,045	100.0%	7,446	100.0%	7,526	100.0%
< $10,000	10	0.1%	6	0.1%	4	0.1%
$10,000 - $14,999	0	0.0%	4	0.1%	3	0.0%
$15,000 - $19,999	6	0.1%	2	0.0%	2	0.0%
$20,000 - $24,999	23	0.3%	0	0.0%	1	0.0%
$25,000 - $29,999	0	0.0%	2	0.0%	0	0.0%
$30,000 - $34,999	8	0.1%	4	0.1%	1	0.0%
$35,000 - $39,999	15	0.2%	16	0.2%	2	0.0%
$40,000 - $49,999	35	0.5%	17	0.2%	13	0.2%
$50,000 - $59,999	78	1.1%	5	0.1%	9	0.1%
$60,000 - $69,999	135	1.9%	15	0.2%	3	0.0%
$70,000 - $79,999	137	1.9%	28	0.4%	6	0.1%
$80,000 - $89,999	354	5.0%	25	0.3%	11	0.1%
$90,000 - $99,999	649	9.2%	62	0.8%	20	0.3%
$100,000 - $124,999	1,975	28.0%	178	2.4%	76	1.0%
$125,000 - $149,999	1,991	28.3%	300	4.0%	153	2.0%
$150,000 - $174,999	944	13.4%	661	8.9%	201	2.7%
$175,000 - $199,999	357	5.1%	1,042	14.0%	509	6.8%
$200,000 - $249,999	183	2.6%	2,371	31.8%	1,968	26.1%
$250,000 - $299,999	72	1.0%	1,642	22.1%	1,918	25.5%
$300,000 - $399,999	43	0.6%	817	11.0%	1,859	24.7%
$400,000 - $499,999	7	0.1%	147	2.0%	549	7.3%
$500,000 - $749,999	6	0.1%	78	1.0%	151	2.0%
$750,000 - $999,999	6	0.1%	7	0.1%	45	0.6%
$1,000,000 +	11	0.2%	17	0.2%	22	0.3%
Median Value	$126,224		$228,596		$270,360	
Average Value	$132,903		$240,444		$291,213	

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

Lombard-final		**Prepared by Alma Flores**	
		Latitude:	**45.577132**
N Lombard St and N Chautauqua Blvd		**Longitude:**	**-122.707959**
Portland, OR 97203	**Site Type: Radius**	**Radius:**	**1.5 mile**

Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	605	100.0%
For Rent	272	45.0%
For Sale Only	142	23.5%
Rented/Sold, Unoccupied	71	11.7%
Seasonal/Recreational/Occasional Use	15	2.5%
For Migrant Workers	0	0.0%
Other Vacant	105	17.4%

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

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	10,880	7,028	64.6%
15 - 24	649	104	16.0%
25 - 34	2,192	1,149	52.4%
35 - 44	2,531	1,617	63.9%
45 - 54	2,251	1,581	70.2%
55 - 64	1,212	884	72.9%
65 - 74	876	677	77.3%
75 - 84	847	742	87.6%
85+	322	274	85.1%

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

	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	10,878	7,027	64.6%
White Alone	8,405	5,940	70.7%
Black Alone	1,092	426	39.0%
American Indian Alone	148	59	39.9%
Asian Alone	416	255	61.3%
Pacific Islander Alone	59	22	37.3%
Some Other Race Alone	366	129	35.2%
Two or More Races	392	196	50.0%
Hispanic Origin	710	263	37.0%

Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	11,504	100.0%	10,890	100.0%
1, Detached	9,159	79.6%	8,750	80.3%
1, Attached	283	2.5%	241	2.2%
2	545	4.7%	511	4.7%
3 to 4	500	4.3%	479	4.4%
5 to 9	289	2.5%	239	2.2%
10 to 19	282	2.5%	262	2.4%
20 to 49	259	2.3%	236	2.2%
50 or More	168	1.5%	153	1.4%
Mobile Home	19	0.2%	19	0.2%
Other	0	0.0%	0	0.0%

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

Lombard-final		Prepared by Alma Flores
N Lombard St and N Chautauqua Blvd		Latitude: 45.577132
		Longitude: -122.707959
Portland, OR 97203	Site Type: Radius	Radius: 1.5 mile

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

	Number	Percent
Total	6,769	100.0%
With Mortgage	4,999	73.9%
< $200	0	0.0%
$200 - $299	8	0.1%
$300 - $399	88	1.3%
$400 - $499	126	1.9%
$500 - $599	269	4.0%
$600 - $699	367	5.4%
$700 - $799	508	7.5%
$800 - $899	517	7.6%
$900 - $999	641	9.5%
$1000 - $1249	1,290	19.1%
$1250 - $1499	711	10.5%
$1500 - $1999	412	6.1%
$2000 - $2499	42	0.6%
$2500 - $2999	14	0.2%
$3000+	6	0.1%
With No Mortgage	1,770	26.1%
Median Monthly Owner Costs for Units with Mortgage	$996	
Average Monthly Owner Costs for Units with Mortgage	$1,034	

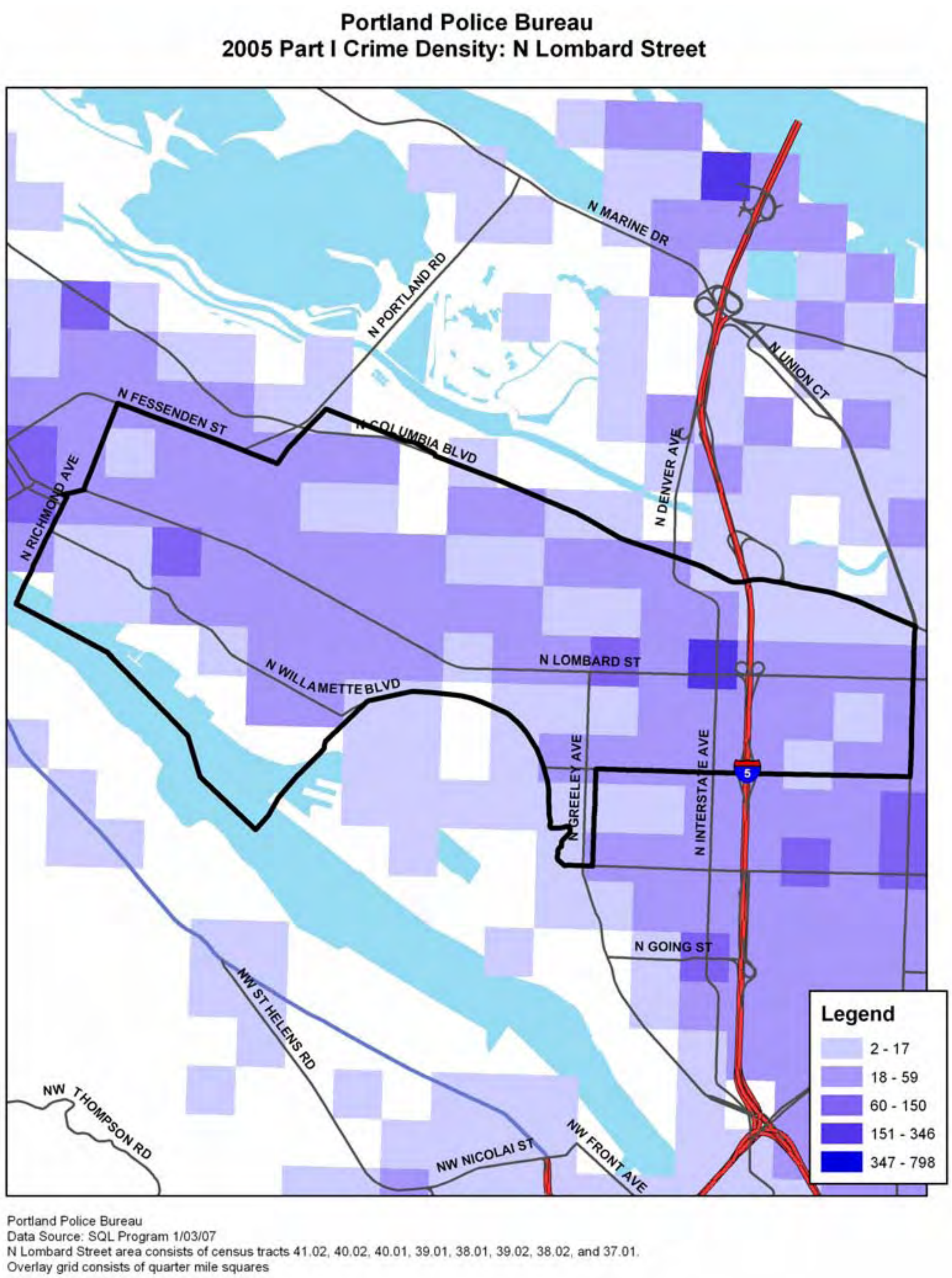
Census 2000 Specified Renter Occupied Housing Units by Contract Rent

	Number	Percent
Total	3,847	100.0%
Paying Cash Rent	3,730	97.0%
< $100	195	5.1%
$100 - $149	106	2.8%
$150 - $199	87	2.3%
$200 - $249	139	3.6%
$250 - $299	165	4.3%
$300 - $349	150	3.9%
$350 - $399	237	6.2%
$400 - $449	280	7.3%
$450 - $499	365	9.5%
$500 - $549	298	7.7%
$550 - $599	404	10.5%
$600 - $649	233	6.1%
$650 - $699	242	6.3%
$700 - $749	204	5.3%
$750 - $799	235	6.1%
$800 - $899	254	6.6%
$900 - $999	90	2.3%
$1000 - $1249	39	1.0%
$1250 - $1499	0	0.0%
$1500 - $1999	7	0.2%
$2000 +	0	0.0%
No Cash Rent	117	3.0%
Median Rent	$524	
Average Rent	$509	
Average Gross Rent (with Utilities)	$629	

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 Contract Rent and Average Gross Rent exclude units paying no cash rent.
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

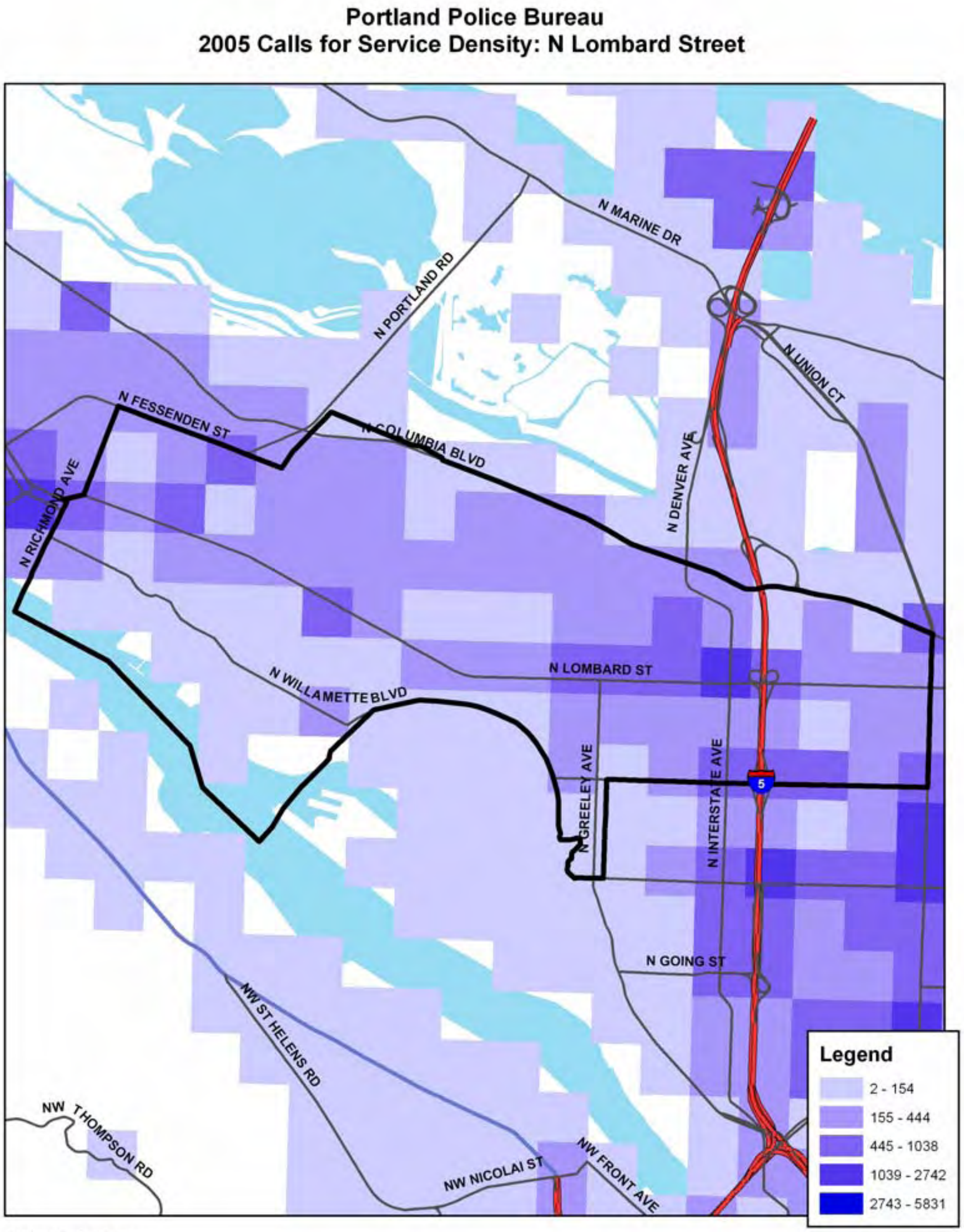
Appendix D:

LOMBARD ST. CRIME MAP



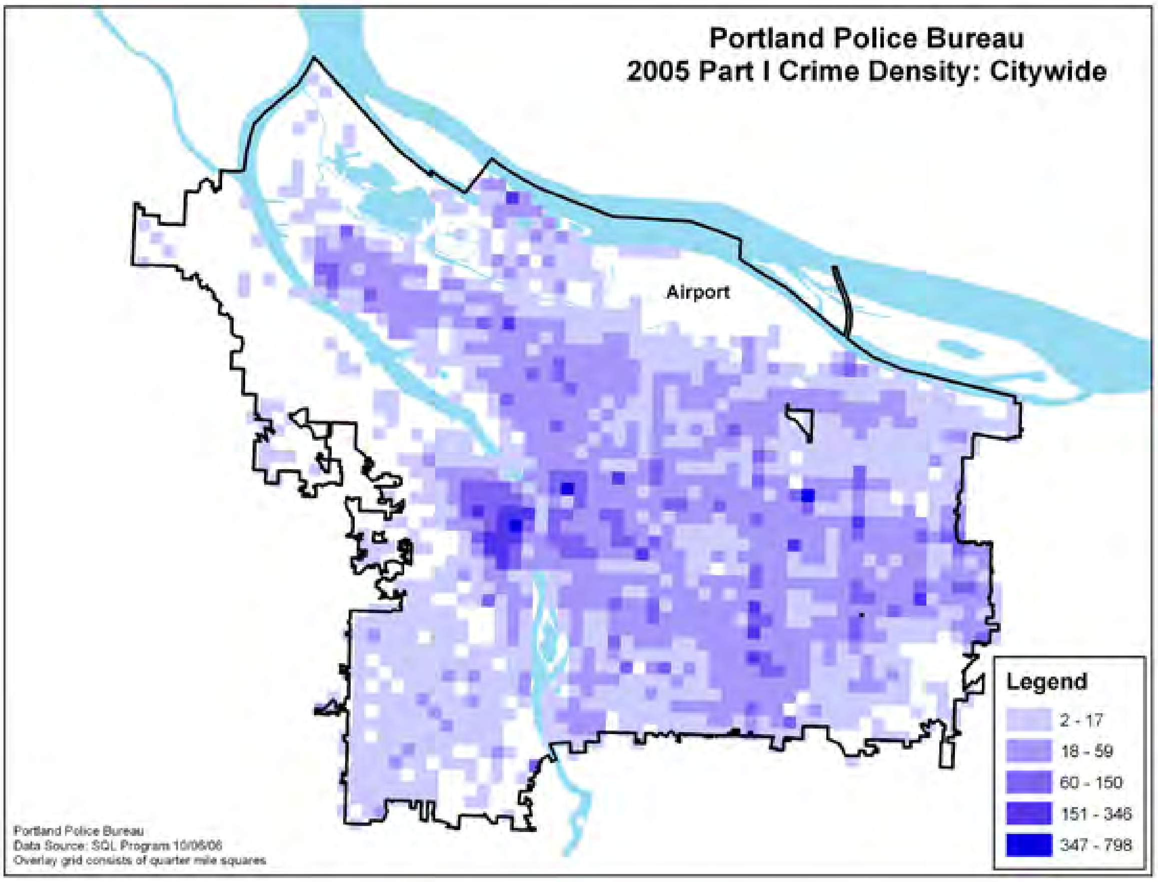
Appendix E:

LOMBARD ST. CALLS FOR SERVICE MAP

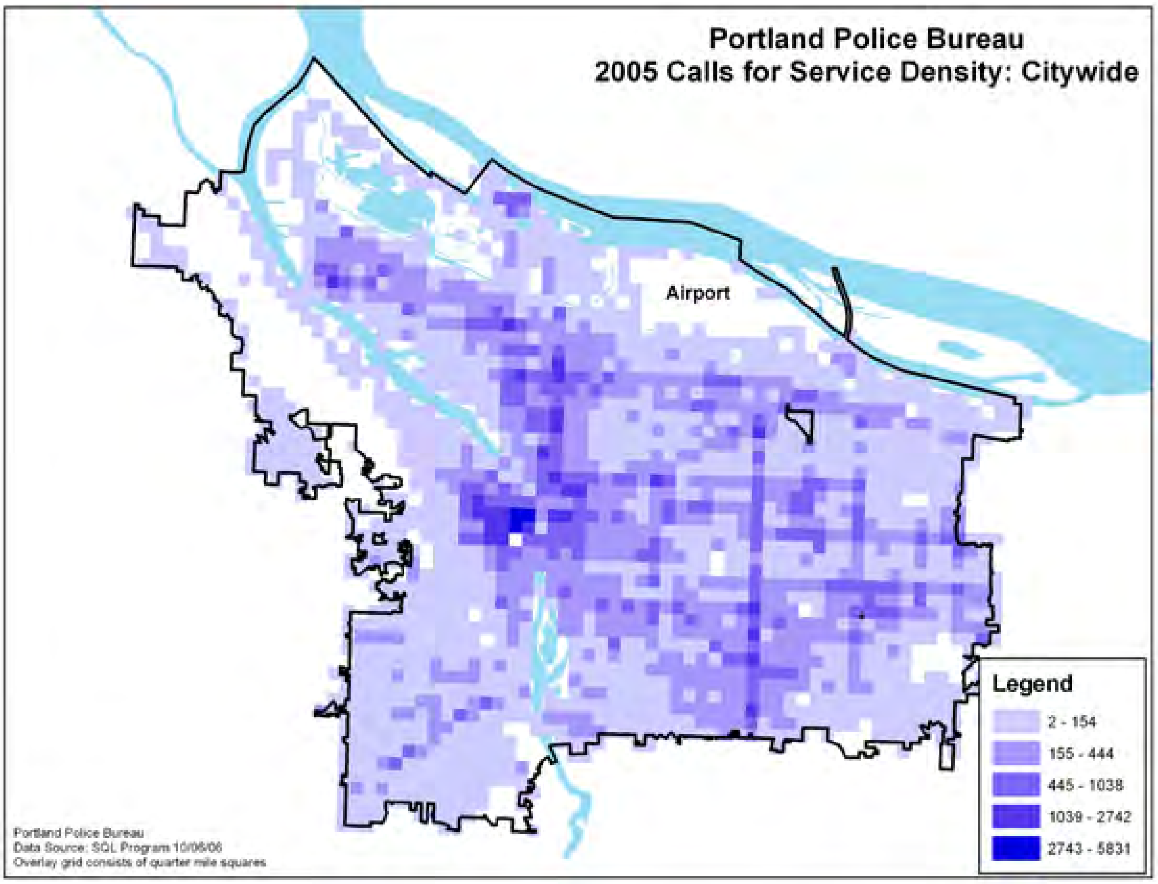


Portland Police Bureau
Data Source: SQL Program 1/03/07
N Lombard Street area consists of census tracts 41.02, 40.02, 40.01, 39.01, 38.01, 39.02, 38.02, and 37.01.
Overlay grid consists of quarter mile squares

Appendix F:
CITYWIDE CRIME MAP



Appendix G:
CITYWIDE CALLS FOR SERVICE MAP



Appendix G:

DETAILED MARKET ANALYSIS DATA

Retail MarketPlace Profile

Prepared by Alma Flores

Lombard4final		Latitude:	45.577132
N Lombard St and N Chautauqua Blvd		Longitude:	-122.707959
Portland, OR 97203	Site Type: Radius	Radius:	1.0 mile

Summary Demographics	
2007 Population	16,160
2007 Households	6,261
2007 Median Disposable Income	$38,700
2007 Per Capita Income	$23,181

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)	$149,978,527	$129,301,471	$20,677,056	7.5	82
Total Retail Trade (NAICS 44-45)	$128,580,260	$103,698,454	$24,881,806	10.7	50
Total Food & Drink (NAICS 722)	$20,398,267	$24,603,017	-$4,204,750	-9.3	32

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$33,699,003	$28,907,807	$4,791,196	7.7	6
Automobile Dealers (NAICS 4411)	$28,324,300	$25,980,486	$2,343,814	4.3	2
Other Motor Vehicle Dealers (NAICS 4412)	$2,716,842	$466,020	$2,250,822	70.7	1
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$2,657,861	$2,461,321	$196,540	3.8	3
Furniture & Home Furnishings Stores (NAICS 442)	$4,625,849	$1,303,607	$3,322,242	56.0	3
Furniture Stores (NAICS 4421)	$2,519,513	$0	$2,519,513	100.0	0
Home Furnishings Stores (NAICS 4422)	$2,106,336	$1,303,607	$802,729	23.5	3
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$4,135,985	$1,868,934	$2,267,051	37.8	6
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$4,403,122	$1,243,831	$3,159,291	55.9	2
Building Material and Supplies Dealers (NAICS 4441)	$4,124,449	$1,243,831	$2,880,618	53.7	2
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$278,673	$0	$278,673	100.0	0
Food & Beverage Stores (NAICS 445)	$27,918,840	$5,789,921	$22,128,919	65.6	8
Grocery Stores (NAICS 4451)	$25,694,492	$5,184,158	$20,510,334	66.4	7
Specialty Food Stores (NAICS 4452)	$1,177,553	$151,454	$1,026,099	77.2	1
Beer, Wine, and Liquor Stores (NAICS 4453)	$1,046,795	$454,309	$592,486	39.5	0
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$4,452,463	$8,186,929	-$3,734,466	-29.4	2
Gasoline Stations (NAICS 447/NAICS 4471)	$12,270,664	$4,098,815	$8,171,849	50.0	3
Clothing and Clothing Accessories Stores (NAICS 448)	$8,397,325	$0	$8,397,325	100.0	0
Clothing Stores (NAICS 4481)	$6,760,906	$0	$6,760,906	100.0	0
Shoe Stores (NAICS 4482)	$1,115,853	$0	$1,115,853	100.0	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$520,566	$0	$520,566	100.0	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$2,542,067	$839,223	$1,702,844	50.4	4
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$1,364,811	$839,223	$525,588	23.8	4
Book, Periodical, and Music Stores (NAICS 4512)	$1,177,256	$0	$1,177,256	100.0	0

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®