

# Glisan Street 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." The Main Streets program promotes a four-pronged approach that includes economic restructuring, design, organization, and promotion. Due to limited resources this study only purports to address some of the economic restructuring elements. Later phases of the Commercial Corridors Project for the city could address the design, promotion, and organizational capacity needs.

This report is part of the second phase of a project that started in 2004. Phase I provided an inventory and assessment of the commercial land uses that can be found along Portland's network of arterial streets outside of the Central City. Ninety three (93) commercial segments were profiled in Phase I (See Appendix A), which focused on activity that can be found along key arterial 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 function as commercial districts or corridors, providing a marketplace of goods and services that serve users ranging from neighborhood households and workers to the regional population.

Phase II of the Commercial Corridor Study, which began in spring 2006 and is anticipated to be completed in summer 2007, incorporates a detailed market analysis of four of the 93 Phase I commercial corridors in the context of citywide baseline market trends. These corridors include:

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

Several factors influenced which corridors were selected for Phase II. All of the Phase II corridors are challenging commercial areas located outside the Central City and the City's 11 urban renewal areas. They are not currently the subject of formal planning or economic development efforts. Most are designated Main Streets in the Metro 2040 Plan, but are not necessarily functioning in that way at this time. All have relatively active business associations that can presumably use the study results to 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.

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

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 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.

# Methodology

This retail market analysis is one tool for identifying retail market trends within a more localized, neighborhood context. In addition to an analysis of demographic data, crime statistics and retail sales potential, Bureau of Planning staff conducted business owner surveys and an “on-the-ground” inventory of existing Corridor buildings and storefronts to provide qualitative information. A copy of the business survey is provided 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.

In conducting this study, specific trade areas were defined. The Corridor’s neighborhood (1-mile) and community (2-mile) trade areas, drawn as concentric circles originating from its center point at the intersection of NE Glisan Avenue and 69th Avenue were selected based upon a variety of factors, including, but not limited to, recent redevelopment, population demographics, business association activity and geographic proximity to other major malls and retail centers that are likely to compete with Corridor businesses for customers. 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 2-mile area given the predominance of small businesses and neighborhood retailers along the Corridor and the close proximity of other major corridors, such as Sandy Boulevard and 82nd Avenue, which may compete with the Glisan Corridor for customers. 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



Many storefronts along the corridor show under-capitalized signs and facades which compromises the integrity of the corridor. A sign and façade program would be a useful tool along the corridor.

# Existing Conditions

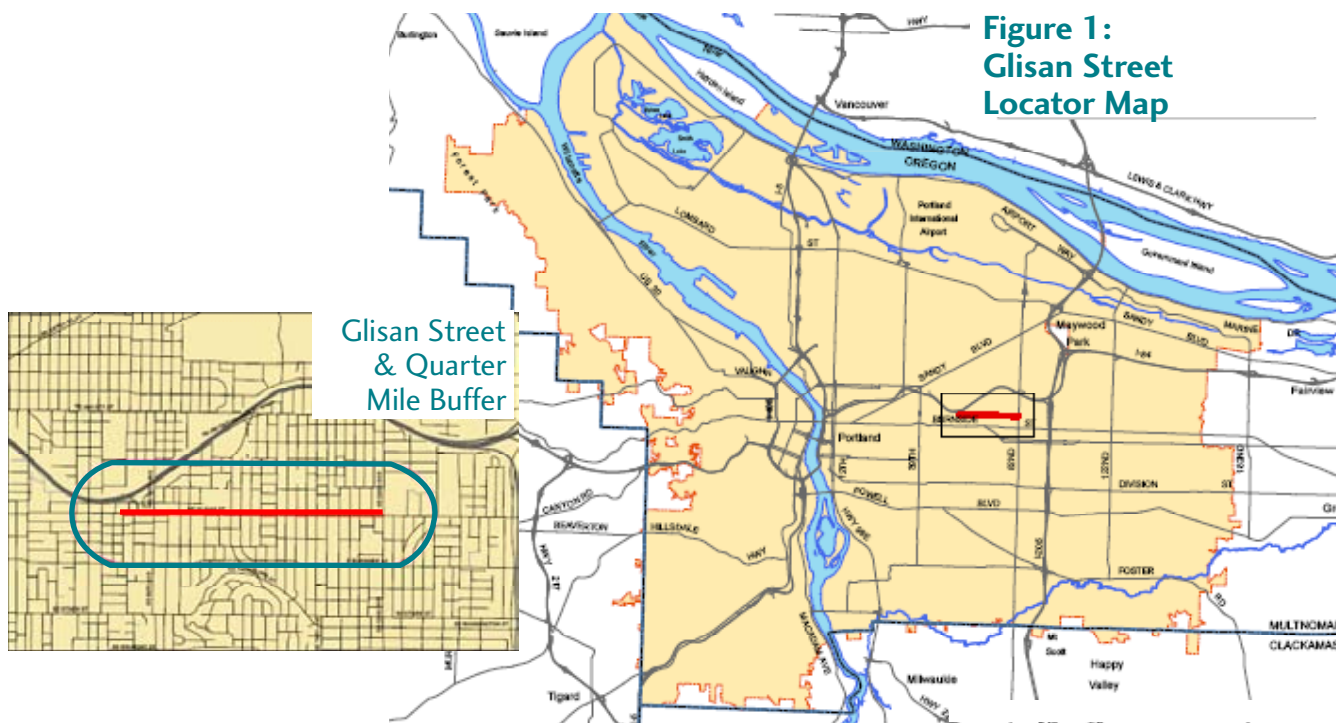
## Overview of the Glisan Street Corridor

The Corridor is located 5 miles northeast of downtown Portland and, as shown in Figure 1, extends roughly 1.2 miles along Glisan Street, from 57th Street to 82nd Avenue. It is contained within two Portland neighborhoods including Center and Montavilla and is served by the 82nd Avenue Business District Association. This corridor, at one point, hosted its own Business Association but dissolved for unknown reasons. Organizational capacity building and decision making for the corridor is limited due to its reliance on the 82nd Avenue Business Association, which is being stretched too thin already.

Some characteristics of the corridor include: it is a 2-lane arterial with on-street parking on both sides, average daily traffic is between 16,000-21,000 with a vehicle oriented streetscape, corridor blocks intersect with neighborhood entrances and the development patterns consist of mostly one-story buildings with minimal landscaping integrated with the sites, there is inadequate public space and amenities and various signage and façade treatments exist.

Some issues that affect the corridor include:

- Uninviting pedestrian environment
- Underutilized and obsolete development sites
- Poor interconnectivity
- Multiple ownership makes redevelopment a challenge
- Age and condition of the buildings
- Compatibility with adjacent residential neighborhoods is not clear





## TRANSPORTATION

The section of Glisan Street that intersects the Corridor is classified as a Major City Traffic Street in the City of Portland’s Transportation System Plan. It is adequately served by public transit, including three bus lines (see Table 1 below) and MAX Blue and Red Lines, accessible at the 60th Avenue MAX Station, just north of Glisan on 60th Avenue.

## LAND USE

Most of the Corridor is zoned General Commercial. However, it does contain some residential zoned property in the Medium and Low Density Multi-Dwelling zoning districts. The General Commercial zone supports an automobile-oriented, low density environment. The Multi-Dwelling zones allow for smaller residential dwellings, such as townhouses, as well as larger, multi-story residential buildings located near collector streets and adjacent to commercial areas and transit.

The majority of Corridor businesses are small, independent retailers and commercial services companies. A community shopping center at the intersection of 66th and Glisan features the Corridor’s only national chains, Fred Meyer, owned by the national grocery store chain Kroger, and PetCo. Originally built in 1962, the Fred Meyer grocery store, which anchors the shopping center, is undergoing a major renovation and expansion that will be completed in 2007. The Corridor competes with major shopping centers in Portland as well as neighboring commercial corridors, including 82nd Avenue and Sandy Boulevard. Some of the commercial and retail services offered by Corridor businesses can be found in other corridors, but are highly specialized. Businesses that provide specialized products and services include a saddlery, a costume rental shop, and an apothecary.

**Table 1:  
Bus Lines Serving the Corridor**

Line 19 – Glisan Street
Line 71 – 57th Ave/Prescott Street (60th/122nd)
Line 72 – 82nd Ave/Killingsworth
MAX Blue and Red Lines



Fred Meyer is undergoing a major renovation and expansion—to be completed in 2007.



Some specialty stores exist along the corridor such as Helen's Pacific Costumers (Glisan and 75th).

## RECENT DEVELOPMENT

Most buildings along the Corridor have small setbacks, multiple stories and a mix of uses. Today, the infrastructure continues to provide a variety of storefront options well-suited for small businesses. As described above, the only full-service grocery store located in the Corridor, Fred Meyer, is being remodeled. Center Commons, a mixed-use transit-oriented development located adjacent to the entrance of I-84, was completed in 2001. The project features 314 rental units, including affordable and market-rate apartments and 172 senior housing units, as well as 26 for-sale, market-rate town homes. At the intersection of 76th and Glisan, across from the New Beginnings Christian Center, Glisan Plaza, a new Christian learning and supplies building, was completed in spring 2007.



Center Commons Housing Development (58th and Glisan) adds high-density living to the Corridor—a much needed boost to the corridor businesses.



Glisan Plaza (76th and Glisan) was completed in Spring 2007 in order to meet the growing demands of New Beginnings Christian Center.

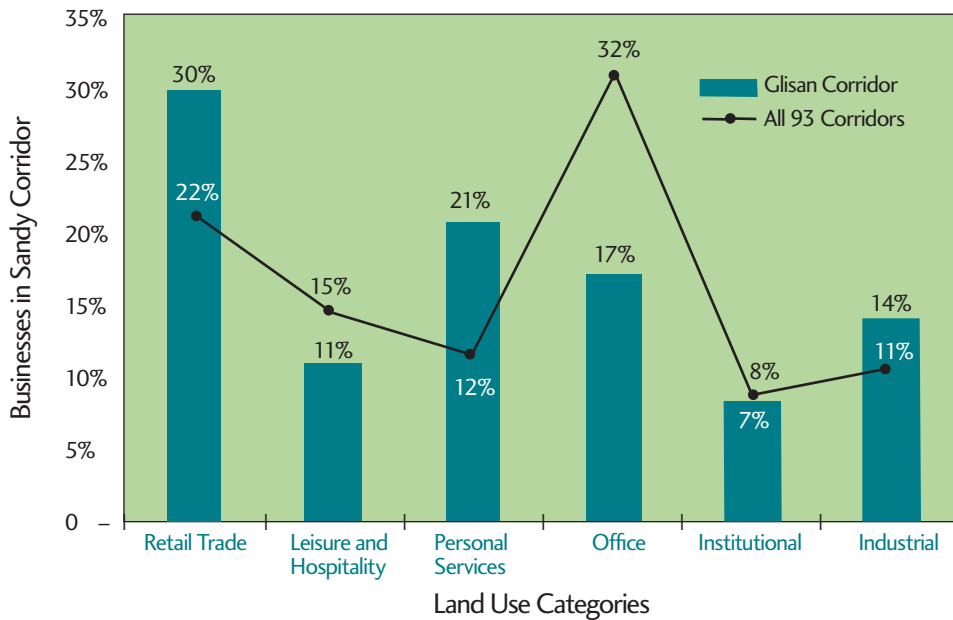
# Mix of Businesses and Land Uses

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 Glisan 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.

## GLISAN STREET IN RELATION TO OTHER CORRIDORS

Figures 2 and 3 below show the percentage of businesses and employees by land use category within the Glisan Avenue Corridor in comparison to the 93 commercial corridors citywide identified in Phase I of this study. This Corridor is comprised of 119 businesses employing an estimated 540 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 Glisan Avenue 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 2004. Similarly, in Figure 3, the reported percentages of employees by land use within the Corridor and all 93 corridors are based on 2004 InfoUSA data and may not be comprehensive since some employee data are not available and therefore are not reflected in these totals.

Figure 2: Percentage of Businesses by Land Use Category

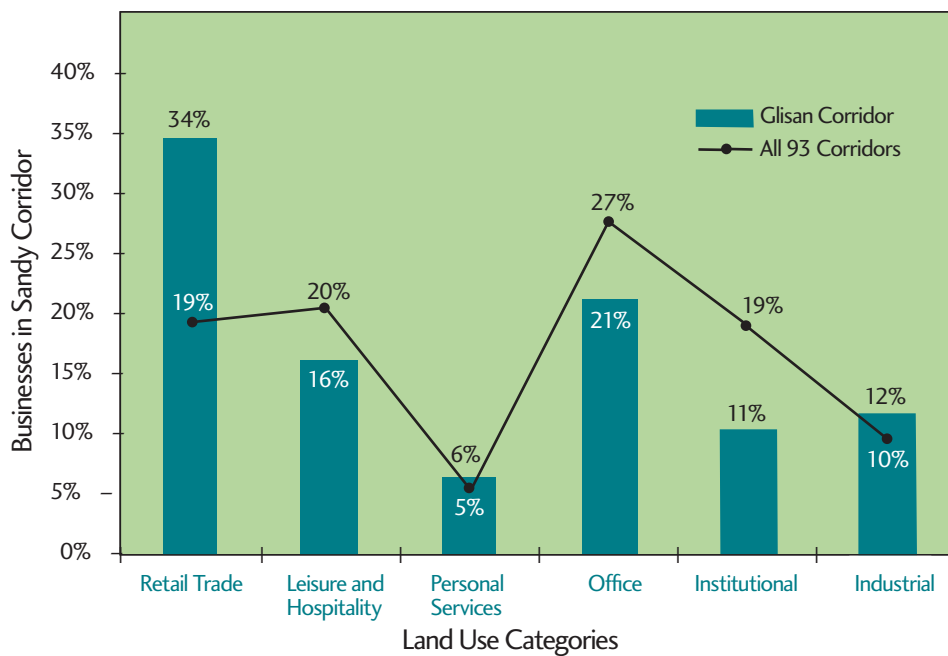


InfoUSA, 2004 data for 93 Corridors. Bureau of Planning Land Use Inventory for Glisan Street Corridor.

**Findings:**

- The business mix along the Glisan Corridor is different from that of all corridors citywide. For example, the Glisan Corridor has a much higher percentage of Retail Trade and Personal Services uses – 30 percent and 21 percent compared to 22 percent and 12 percent citywide. Further, at 17 percent, the percentage of Office businesses along the Corridor is 15 percent lower than the percentage for all 93 corridors.
- The Corridor has slightly more Industrial businesses than other corridors citywide – 14 percent compared to 11 percent for all 93 corridors.

**Figure 3: Percentage of Employees<sup>1</sup> by Land Use Category**



InfoUSA, 2004 data for 93 Corridors. ES 202 2005 Employment data, Bureau of Planning Land Use Inventory for Glisan Street Corridor.

<sup>1</sup> Employment includes subcontractors

**Findings:**

- Relative to all corridors citywide, the percentage of Retail Trade employees in the Corridor is significantly higher– 34 percent compared to 19 percent for all 93 corridors.
- There are fewer Institutional workers along the Corridor – 11 percent compared to 19 percent citywide. While the Corridor has a higher percentage of employees working in the Industrial and Personal Services industries, the difference is modest at 2 percent and 1 percent.
- The percentage of employees working in the Office and Leisure and Hospitality sectors are lower within the Corridor than all corridors citywide.

## LAND USE INVENTORY

A review of existing land use and development patterns can provide useful information about how an area has evolved over the years and what type of development is likely to occur in the future. In summer 2006, the Bureau of Planning conducted a land use inventory along the Glisan 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 232 businesses and 282 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.

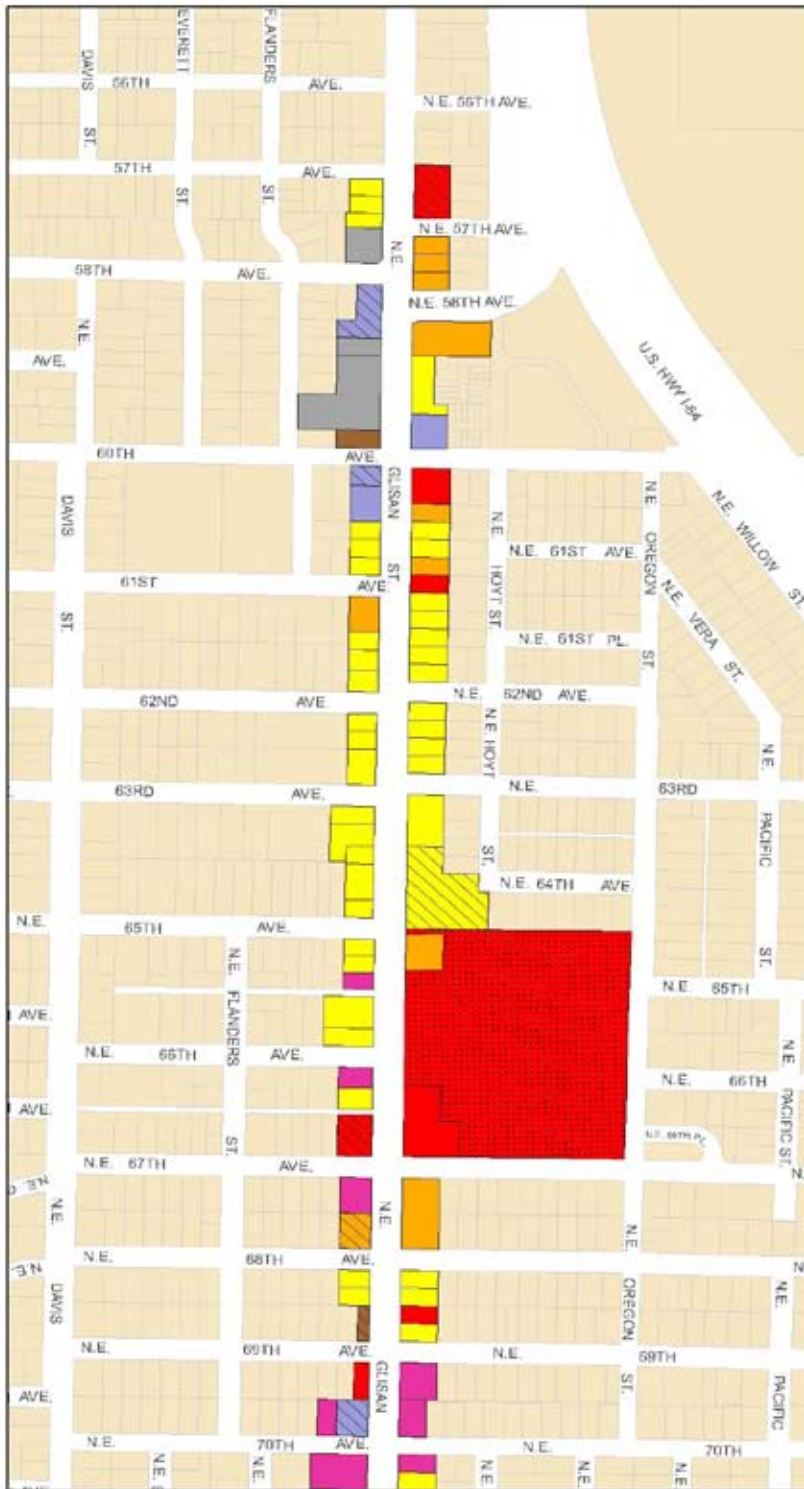
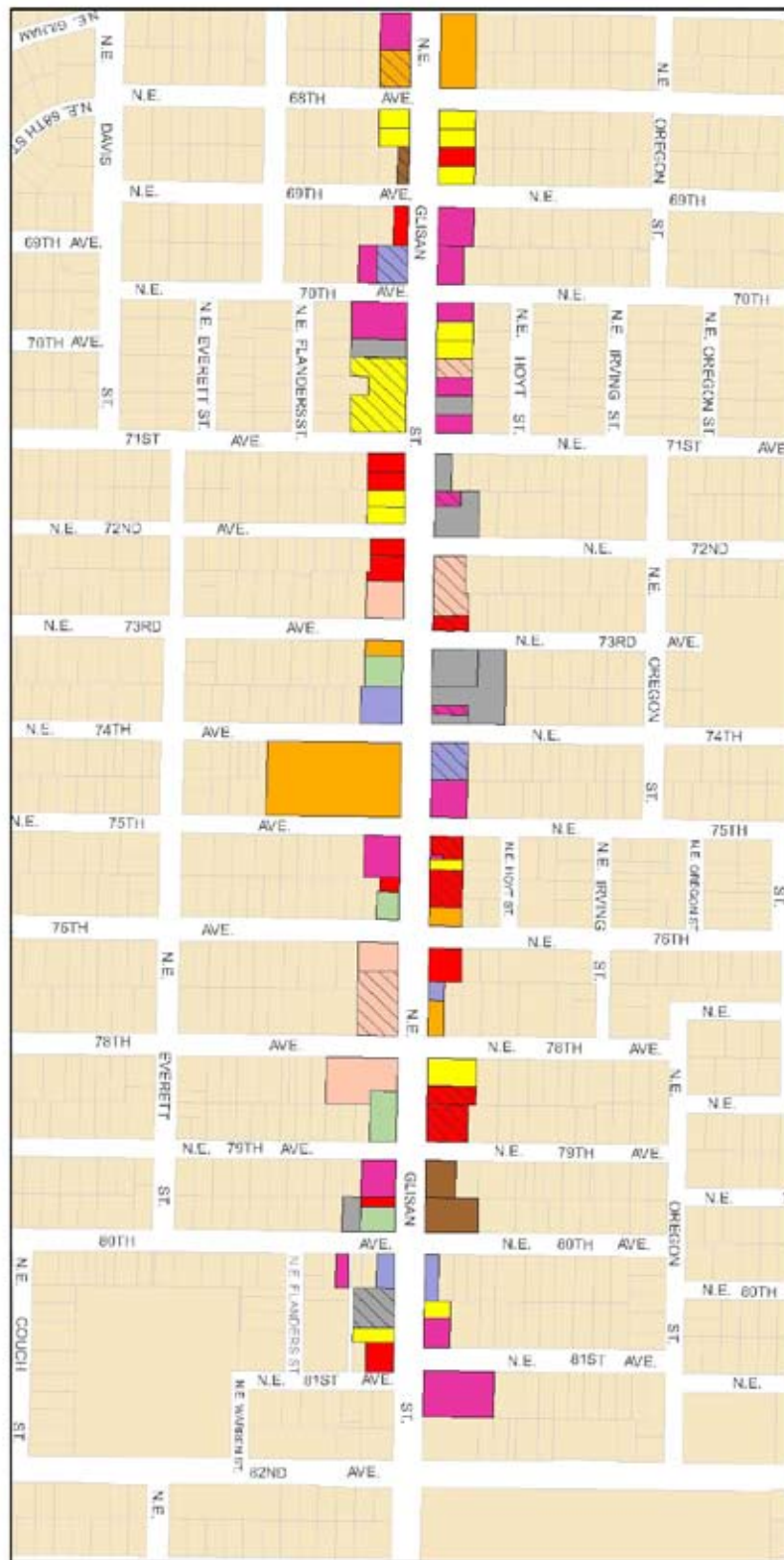


Figure 4:  
Land Use Map – West Section





**Figure 4a:**  
**Land Use Map – East Section**



Table 2 provides a summary of land uses within the Glisan Corridor. The employment uses are categorized by seven general uses, including Retail Trade, Leisure and Hospitality, Personal Services, Office, Open Space, 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 Retail Trade, Institutional and Leisure and Hospitality uses, which occupy 41 percent, 23 percent and 13 percent of the Corridor’s total building square footage 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
<b>EMPLOYMENT USES</b>					
Retail Trade		25	17%	213,728	23%
Motor Vehicle Dealers	4411-2	0	0%	0	0%
Food and Beverage Stores	445	6	4%	115,645	12%
All Other Retail Trade	*	19	13%	98,083	11%
Leisure and Hospitality		9	6%	46,578	5%
Restaurants and Bars	722	9	6%	46,578	5%
Lodging	721	0	0%	0	0%
Arts, Entertainment and Recreation	711-3	0	0%	0	0%
Personal Services		18	13%	67,402	7%
Automotive Repair and Maintenance	8111	13	9%	53,062	6%
Personal Care and Laundry Facilities		3	2%	7,064	1%
Other Repair and Maintenance	8113-4	2	1%	7,276	1%
Office		14	10%	116,124	13%
Medical and Dental Offices	622-3	3	2%	9,072	1%
Professional and Business Services	541, 551, 561	4	3%	8,111	1%
Financial Activities	521-5, 531-3	6	4%	79,691	9%
Information	511-2, 515-9	1	1%	19,250	2%
Government	921-8	0	0%	0	0%
Institutional		6	4%	64,282	7%
Religious, Community and Social Service Institutions	813, 624	5	3%	63,418	7%
Schools and Colleges	611	1	1%	864	0%
Medical Centers and Residential Care Facilities	622-3	0	0%	0	0%
Industrial <sup>1</sup>	**	12	8%	69,075	7%
Construction of Buildings		2	1%	7,060	1%
Electrical Equipment, Appliances, and Component Manuf.		1	1%	7,144	1%
Fabricated Metal Product Manufacturing		1	1%	3,950	0%
Merchant Wholesalers, Durable Goods		6	4%	47,403	5%
Rental and Leasing Services		2	1%	3,518	0%
<b>Total Employment Uses</b>		<b>84</b>	<b>58%</b>	<b>577,189</b>	<b>62%</b>
<b>NON-EMPLOYMENT USES</b>					
Open Space		0	0%	0	0%
Residential		52	36%	342,997	37%
Vacant Building or Storefront		4	3%	5,040	1%
Vacant Land <sup>2</sup>		4	3%	0	10%
<b>Total Non-Employment Uses</b>		<b>60</b>	<b>42%</b>	<b>348,037</b>	<b>38%</b>
<b>Total Uses</b>		<b>144</b>	<b>100%</b>	<b>925,226</b>	<b>100%</b>

<sup>1</sup>Includes the following NAICS Industry Sectors: Construction of Buildings, Electrical Equipment, Appliance and Component Manufacturing, Fabricated Metal Product Manufacturing, Merchant Wholesalers, Durable Goods, and Rental and Leasing Services.

\* 442-4, 445-8, 451-4

\*\*111-5, 211-3, 221, 236-8, 311-6, 321-7, 331-9, 423-5, 481-8, 491-3, 562

<sup>2</sup>All are zoned commercial



### Findings:

- Of the 144 tax lots along the Corridor, employment uses constitute just 58 percent. This is due to the large presence of residential uses (36 percent) along the corridor.
- Retail trade, including Food and Beverage Stores, is the predominant employment land use along the Corridor, accounting for an estimated 17 percent of total uses.
- In addition to retail uses, Personal Services and Offices, which comprise 13 percent and 10 percent of total land uses along the Corridor, feature prominently.
- 17 restaurants and bars are located along the Corridor.
- Potential for redevelopment is limited due to approximately 4 vacant storefronts. However, there may be additional potential for rehabilitation of some of the aging buildings along the Corridor.

## INDUSTRY MIX

Table 3 the distribution of Corridor businesses by National American Industry Classification System (NAICS) industry sector. NAICS is a standardized system used in the United States and Canada to classify different industries. Table 3 provides an overview of the industry makeup of the Corridor at the broadest level using two-digit NAICS codes. Tables 4 to 7 provide more detail for three of the main industry sectors (Other Services, Retail Trade, and Accommodation and Food Services) along the Corridor using three-, four- and five-digit NAICS codes. Similar to the land use survey, the business composition analysis reveals that most Corridor businesses specialize in services, including, but not limited to, personal care services, hair, nail and skin care services, automotive repair services, and other commercial services. The health of the businesses are unknown and not part of this research, but given the supply of these services makes for highly competitive sectors, dspecially when one factors in the competing districts near the corridor.

Table 3: Business Composition by Industry

NAICS Industry Sector	NAICS Codes	Number of Businesses	Percent of Total Uses
Construction	23	3	3%
Manufacturing	32-33	3	3%
Wholesale Trade	42	6	5%
Retail Trade	44-45	34	29%
Transportation and Warehousing	48-49	0	0%
Information	51	1	1%
Finance and Insurance	52	4	3%
Real Estate Rental and Leasing	53	4	3%
Professional, Scientific, and Technical Services	54	9	8%
Administrative/Support Services	56	1	1%
Educational Services	61	2	2%
Health Care and Social Assistance	62	3	3%
Arts Entertainment and Recreation	71	0	0%
Accommodation and Food Services	72	17	14%
Other Services	81	32	27%
Public Administration	0	0	0%
<b>Total Businesses</b>	-	<b>119</b>	<b>100.0%</b>

Source: Portland Bureau of Planning 2007 Business Owner Survey

Table 4 shows the distribution of businesses for the category, “Other Services” by 5-Digit NAICS classification.

**Table 4: Other Service Businesses by 5-Digit NAICS**

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
All Other Personal Services	81299	1	3%
Automotive Body, Paint, Interior and Glass Repair	81112	3	9%
Automotive Mechanical and Electrical Repair and Maintenance	81111	12	38%
Civic and Social Organizations	81341	1	3%
Drycleaning and Laundry Services	81232	1	3%
Hair, Nail and Skin Care Services	81211	7	22%
Electronic and Precision Equipment Repair and Maintenance	81141	2	6%
Other Personal Care Services	81219	1	3%
Religious Organizations	81311	4	13%
<b>Total</b>		<b>32</b>	<b>100%</b>

Source: Portland Bureau of Planning 2007 Business Owner Survey

**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 60 percent of businesses in the “Other Services” industry sub sector.
- The Corridor is home to four religious organizations.

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

**Table 5: Retail Trade Businesses by 3-Digit NAICS**

3-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Clothing and Clothing Accessories Stores	448	2	6%
Electronics and Appliance Stores	443	1	3%
Food and Beverage Stores	445	6	18%
Furniture and Home Furnishing Stores	442	4	12%
Gasoline Stations	447	2	6%
Health and Personal Care Stores	446	1	3%
Miscellaneous Store Retailers	453	11	32%
Motor Vehicle and Parts Dealers	441	3	9%
Sporting Goods, Hobby, Book and Music Stores	451	4	12%
<b>Total</b>		<b>34</b>	<b>100%</b>

Source: Portland Bureau of Planning 2007 Business Owner Survey

**Findings:**

- Food and Beverage Stores constitute 18 percent of Retail Trade businesses along the Corridor. Two Asian markets, Kabayan’s Best Asian Grocery and Bui’s Natural Tofu, a recently remodeled Fred Meyer’s at the intersection of x and Glisan, and several convenience stores are examples of the Corridor’s diverse mix of Food and Beverage retailers.
- Four Furniture and Home Furnishing Stores, including Maple Creek Furniture and Knotty by Nature; four Sporting Goods, Hobby, Book, and Music Stores, including the New Beginnings Bookstore, are located along the Corridor. Together, businesses in these industry sub-sectors account for 24 percent of Retail Trade businesses on the Corridor.

Table 6 below shows the distribution of Accommodation and Food Services businesses by 5-Digit NAICS classification.

**Table 6: Accommodation and Food Services Businesses by 5-Digit NAICS**

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Drinking Places (Alcoholic Beverages)	72241	5	29%
Full Service Restaurants	72211	4	24%
Limited Service Eating Places	72221	8	47%
Total		17	100%

Source: Portland Bureau of Planning 2006 Business Owner Survey

**Findings:**

- Full Service Restaurants and Limited Service Eating Places (i.e. fast food) comprise 71 percent of the Corridor’s Accommodation and Food Service employers (20 businesses). An assortment of restaurants and cafes, including El Dorado Mexican Grill & Cantina, Paitong Thai, and Cali Sandwiches, are located on the Corridor.
- Five bars, including Bidley’s and the Glisan Street Pub, are located on the Corridor.

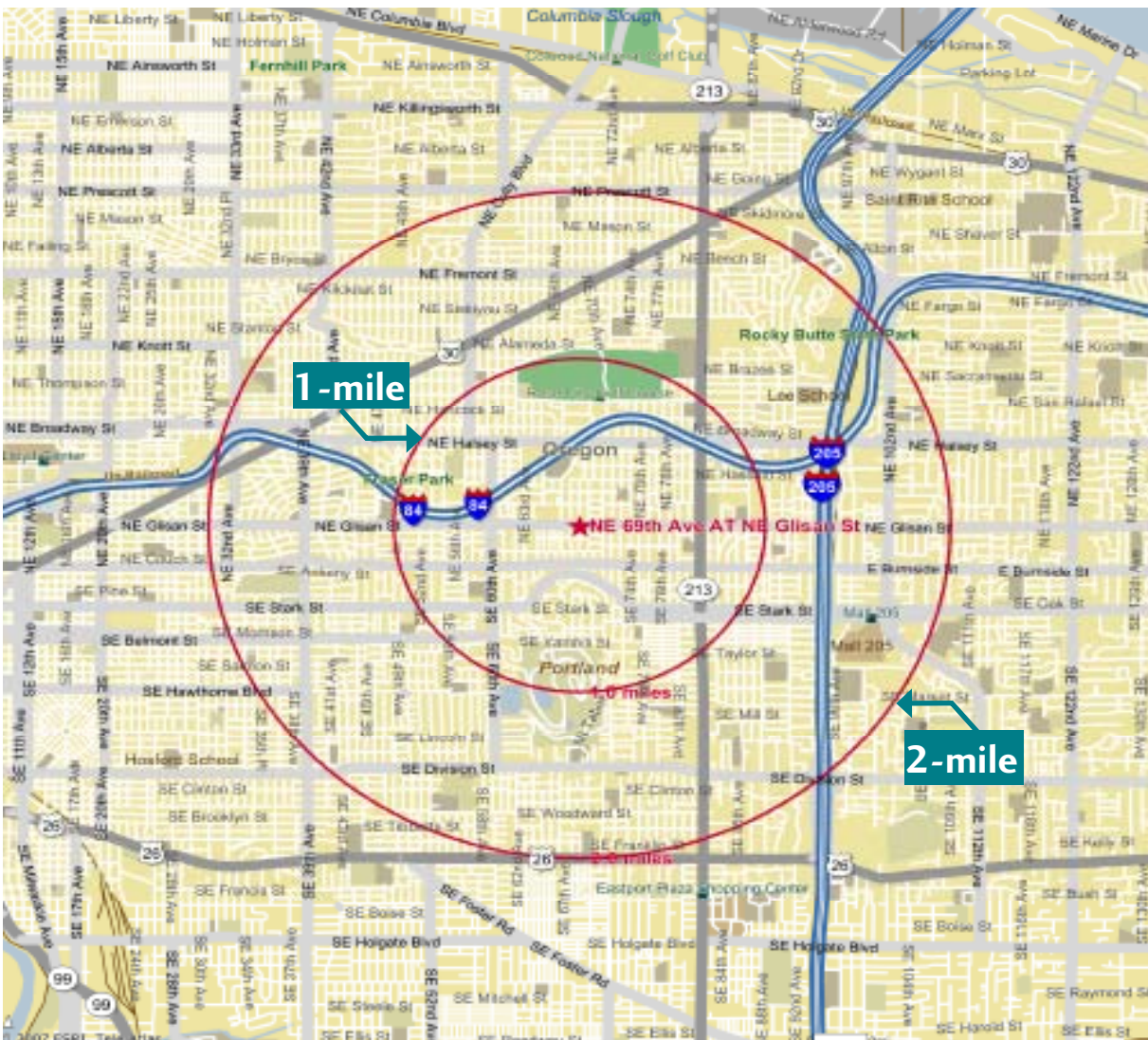


El Dorado Mexican restaurant is an example of an ethnic business along Glisan Street.

# Demographics

This section is designed to provide a technical examination of the conditions that impact the market demand for the Glisan Street 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 and residential density. The combined spending of residents, employees, and visitors to an area represents the ability of these groups to support commercial uses. Demand is based on the spending power and the capture rate of residents on non-residents of the area. As described in the Methodology, the majority of potential customers are assumed to be drawn from a two-mile area originating from the Corridor’s center point (See Figure 6). While the Corridor functions primarily as a neighborhood and community serving commercial center, some of its retail sales originate from beyond the neighborhood and community trade areas.

Figure 6: Map of Neighborhood (1-mile) and Community (2-mile) Trade Areas



Source: ESRI Business Analyst and Portland Bureau of Planning.

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

## POPULATION AND HOUSING TRENDS

### Household and Employment Characteristics

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

Table 7 provides 2005 estimates and 2030 forecasts of the total households in the neighborhood and community trade areas and citywide. Table 8 provides 2005 estimates and 2030 forecasts of the total number of persons employed by employment type in the neighborhood and community trade areas and citywide.

Table 7: Household Estimates and Forecasts

	2005 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	10,312	11,006	7%
Community Trade Area	32,409	38,278	18%
Portland	235,180	299,355	27%

Table 8: Employment Estimates and Forecasts

	2005 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	11,924	15,617	31%
Community Trade Area	35,190	47,645	35%
Portland	437,297	299,997	37%

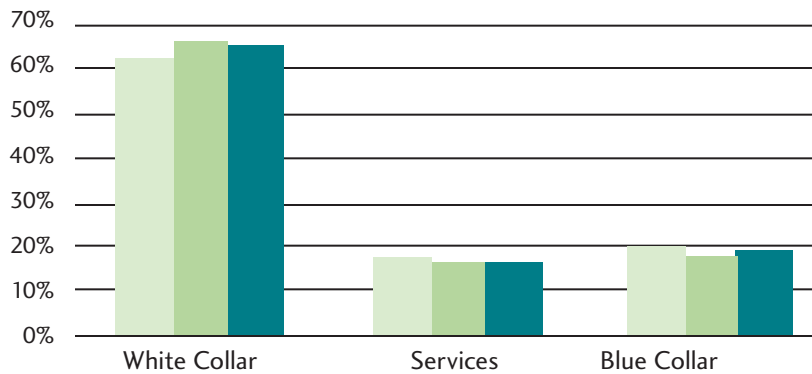
### Findings:

- The neighborhood and community trade areas are projected to experience significantly lower population growth than the city between 2005 and 2030.
- The neighborhood and community trade areas are projected to experience slightly lower employment growth than the city between 2005 and 2030.

### 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 7 below, at 63 percent, in the neighborhood trade area, the majority of workers are white collar workers. Compared to the City, however, the neighborhood has a slightly lower concentration of white collar workers and a higher percentage of services and blue collar workers. However, the occupation breakdown for the neighborhood, community and the City are very similar. Accordingly, businesses that offer a broad mix of goods and services consumed by white collar professionals as well as services and blue collar workers are likely to thrive in the neighborhood trade area.

Figure 7: 2005 Employed Population 16+ by Occupation



Area	White Collar	Services	Blue Collar
Neighborhood Trade Area	63%	17%	20%
Community Trade Area	66%	16%	18%
Portland	65%	16%	19%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI 2005 estimates.

**Findings:**

- Compared to the City, the neighborhood has a lower concentration of white collar workers and a higher percentage of services and blue collar and service workers.
- Relative to the neighborhood trade area, the community trade area’s employed population more closely resembles the employed population Citywide.

**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 active housing markets. Table 9 shows that within the Neighborhood Trade area there were over 10,000 housing units in 2005 with a comparable City of Portland homeownership rate.

**Table 9: Housing Characteristics**

	Neighborhood Trade Area			Community Trade Area			Portland		
	2000	2005	2010	2000	2005	2010	2000	2005	2010
Total Housing Units	9,752	10,049	10,397	36,863	38,254	39,679	237,307	245,975	256,252
Occupancy Rate	95%	94%	93%	96%	94%	93%	94%	94%	94%
Vacancy Rate	5%	6%	7%	4%	6%	7%	6%	6%	6%
Homeownership Rate	54%	57%	53%	61%	63%	63%	56%	57%	57%
Median Home Value	\$147,330	\$237,139	\$309,078	\$158,111	\$251,509	\$330,949	\$154,721	\$210,133	\$277,084

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

**Findings:**

- The homeownership rate in the community trade area is consistently higher than that of the neighborhood trade area and the City of Portland.
- In the neighborhood trade area, the homeownership rate is expected to decline between 2006 and 2011, while it is projected to remain stable in the community trade area and the City of Portland during the same time period.
- Vacancy rates are projected to slowly rise in the neighborhood and community trade areas but remain stable for the City of Portland.

**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 10 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 2006 and 2011.

**Table 10: Population By Age**

Age Group	Neighborhood Trade Area			Community Trade Area			Portland		
	2000	2006	2011	2000	2006	2011	2000	2006	2011
0 - 19	23%	23%	22%	23%	22%	21%	24%	23%	22%
20 - 34	26%	23%	23%	25%	23%	22%	26%	25%	24%
35 - 64	38%	42%	44%	40%	43%	45%	39%	41%	42%
65+	12%	11%	11%	13%	12%	12%	12%	11%	12%
Median Age	35.3	36.9	38.4	36.2	37.8	39.3	35.2	36.3	37.6

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

**Findings:**

- In general, the neighborhood and community trade area and City populations have a similar age distribution and median age.
- Between 2000 and 2010, the median age in all three geographies is projected to increase by more than two years, with increases of more than 3 years projected in both the neighborhood and community trade area.

**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 11 shows the estimated distribution of total households by household income in 2006 for the Neighborhood and Community Trade Areas and the City of Portland.



Table 11: Total Households by Household Income

ESRI 2005 Estimate	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Household Income Base	9,434	100%	35,899	100%	230,860	100%
< \$15,000	990	10.5%	3,320	9.2%	30,924	13.4%
\$15,000 - \$24,999	971	10.3%	3,285	9.2%	25,464	11%
\$25,000 - \$34,999	1,138	12.1%	3,707	10.3%	26,571	11.6%
\$35,000 - \$49,999	1,605	17%	5,857	16.3%	38,479	16.6%
\$50,000 - \$74,999	2,076	22%	7,863	21.9%	46,738	20.2%
\$75,000 - \$99,999	1,254	13.3%	5,353	14.9%	25,749	11.2%
\$100,000 - \$149,999	958	10.2%	4,418	12.3%	23,833	10.3%
\$150,000 - \$199,999	285	3%	1,314	3.7%	5,930	2.6%
\$200,000+	157	1.7%	782	2.2%	7,172	3.1%
Median Household Income	\$50,120		\$55,259		\$47,277	
Average Household Income	\$62,829		\$67,998		\$63,788	
Per Capita Income	\$26,600		\$28,702		\$27,379	

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing, ESRI 2006 population estimate.

**Findings:**

- In 2006, the neighborhood and community trade areas had a higher proportion of middle-class households, earning \$35,000 to \$99,999, than the City of Portland.
- At 21% and 18%, the respective percentages of low-income households in the neighborhood and community trade areas earning less than \$25,000 is slightly lower than the citywide share of low-income households (24%).
- The median household incomes for the neighborhood trade area (\$50,120) and the community trade area (\$55,259) are higher than that of the City of Portland (\$47,277).
- The community trade has a larger proportion of higher income households earning \$100,000 or more (18%) than the neighborhood trade area (15%) and the City (16%).

**Education**

For some retailers, educational attainment is an important indicator of the consumer demand for certain convenience and comparison shopping goods. For example, some specialty grocers, such as Trader Joe’s, choose to locate in areas with high education attainment while others make this decision based solely on disposable income. According to the Census Bureau (Table 12) the percentage of the neighborhood population with a four-year degree is low compared to the City, retailers that cater to consumers with higher levels of educational attainment may be less likely to locate there.

Table 12: Educational Attainment, 2000

Educational Attainment	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total	15,268	100%	59,300	100%	363,851	100%
Less than 9th Grade	792	5%	3,016	5%	18,744	5%
9th - 12th Grade, No Diploma	1,254	8%	4,781	8%	33,382	9%
High School Graduate	3,399	22%	12,268	21%	80,947	22%
Some College, No Degree	4,150	27%	15,376	26%	90,825	25%
Associate Degree	937	6%	3,414	6%	21,255	6%
Bachelor's Degree	3,219	21%	13,590	23%	77,321	21%
Master's/Professional/Doctorate	1,517	10%	6,855	12%	41,377	11%

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

**Findings:**

- In general, the neighborhood and community trade area and City populations have a similar proportion of residents over age 25 that do not have a high school diploma in 2000.
- Advanced degrees are slightly less common in the neighborhood trade area, where 10 percent of residents have earned a Master’s, Professional, or Doctorate Degree, compared with 12 percent of the Community Trade Area population and 11 percent of the Portland population.

**Race and Ethnicity**

Racial and ethnic distributions also impact consumer spending and business development. In recent years, for example, as the Asian American population in nearby neighborhoods has grown, the Corridor has witnessed an increase in the number of ethnic markets and businesses oriented towards these ethnic groups. Table 13 shows the racial distribution of the 1-mile and 3-mile trade area.

Table 13: Race and Ethnicity, 2000

Race or Ethnicity	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total Population	23,474	100%	88,443	100%	529,121	100%
White Alone	17,306	78%	68,168	81%	412,241	78%
Black or African American Alone	747	3%	2,432	3%	35,115	7%
American Indian or Alaska Native Alone	189	1%	691	1%	5,587	1%
Asian Alone	2,280	10%	7,682	9%	33,470	6%
Pacific Islander Alone	85	0%	258	0%	1,993	0%
Some Other Race Alone	629	3%	1,953	2%	18,760	4%
Two or More Races	929	4%	3,042	4%	21,955	4%
Total Hispanic/Latino Origin	1,309	6%	4,217	5%	36,058	7%

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

Findings:

- The neighborhood market area is largely comprised of non-Hispanic Whites (78 percent) and a growing Asian and Pacific Islander population (10 percent).
- Both the Neighborhood and the Community Trade areas have a higher proportion of Asian and Pacific Islander population than they city as a whole which reflects the growth of the niche markets along the corridor.

# Business Environment

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

## BUSINESS AND CUSTOMER PERCEPTIONS

The majority of business owners surveyed along the Corridor felt the quality of businesses and safe roads were the most important for the health and vitality of the corridor. According to Table 14, appearance of buildings and signs, quality of businesses, traffic circulation and customer service were other important factors. The least important factors are also noted in the table.

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

Rank	Most Important	Least Important
1	Quality of Businesses	Variety of Entertainment Options
2	Safe Roads	Availability of Multi-Cultural Businesses/Activities
3	Maintained Buildings	Variety of Restaurants
3	Attractive & Visible Signage	

While 44 percent of the business owners rated the maintenance of buildings as bad or very bad, 42 percent responded that their interiors did not require changes to attract more customers. However, business owners were more interested in storefront improvements with 39 percent of respondents saying that their storefronts require improvements to attract more customers. Overall, the majority of business owners would like to make changes to their storefront as opposed to their interior, with 39 percent desiring storefront improvements and 22 percent desiring interior improvements (See Figures 8 and 9). A storefront enhancement program could be an option to help encourage revitalization of the Corridor.

Figure 8: Businesses that Desire Storefront Improvements

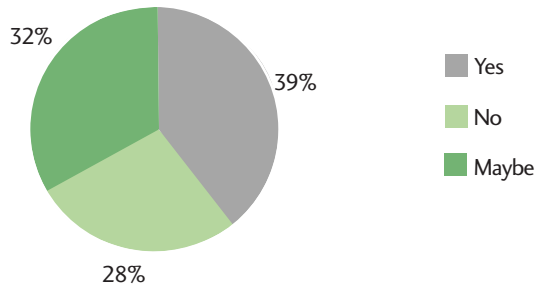
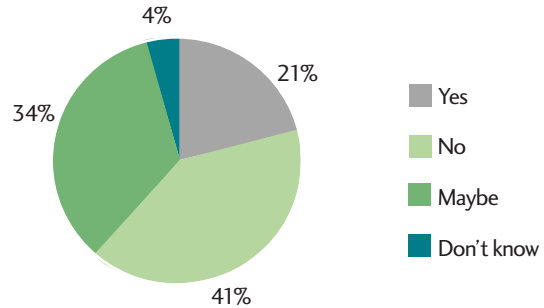


Figure 9: Businesses that Desire Interior Improvements



## CRIME STATISTICS

Based on data from the Portland Police Bureau, Table 15 shows the number of crimes against persons and property as well as calls for service<sup>2</sup> that occurred within the City of Portland and Glisan Street between 2000 and 2005. For the purpose of analyzing crime trends, Glisan Street includes census tracts located within a quarter mile radius of the Corridor. When comparing crime and calls for service activity for Glisan Street to the city, it is important to keep in mind that Glisan 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 Glisan Street. See Appendices F and G for a detailed map of Crime and Calls for Service Citywide.

<sup>2</sup>Calls for service includes two types of calls, dispatched calls and self-initiated calls, and do not necessarily result in an arrest. Dispatched calls refer to 9-1-1 calls that have come into the Bureau of Emergency Communications (BOEC) and for which an officer is dispatched to that incident. Self-initiated calls occur when an officer witnesses an incident while on patrol and responds (or someone stops the officer on the street and reports a problem).

Table 15: Total Crimes and Calls for Service

82nd Avenue								Portland						
	2000	2001	2002	2003	2004	2005	% change 2000-05	2000	2001	2002	2003	2004	2005	% change 2000-05
<b>CRIMES</b>														
<b>CRIMES AGAINST PERSONS</b>														
Murder	0	1	0	0	0	0	---	18	22	20	28	29	22	22%
Rape	5	11	6	6	7	6	20%	369	305	354	310	313	325	-12%
Robbery	25	29	26	33	26	27	8%	1,455	1,272	1,296	1,375	1,291	1,139	-22%
Aggravated assault	98	36	72	68	48	56	-43%	3,864	2,963	2,844	2,732	2,405	2,376	-39%
<b>Total Person Crimes</b>	<b>128</b>	<b>97</b>	<b>104</b>	<b>107</b>	<b>81</b>	<b>89</b>	<b>-30%</b>	<b>5,706</b>	<b>4,562</b>	<b>4,514</b>	<b>4,445</b>	<b>4,038</b>	<b>3,862</b>	<b>-32%</b>
<b>CRIMES AGAINST PROPERTY</b>														
Burglary	142	157	162	219	254	187	32%	5,601	5,615	5,731	6,507	7,259	6,142	10%
Larceny	635	840	776	991	785	632	0%	25,063	28,457	28,052	29,748	28,452	25,941	4%
Motor vehicle theft	155	186	191	197	224	258	66%	4,782	4,765	5,255	5,982	6,052	5,834	22%
Arson	9	12	9	21	6	7	-22%	510	385	496	384	363	375	-26%
<b>Total Property Crimes</b>	<b>941</b>	<b>1,195</b>	<b>1,138</b>	<b>1,428</b>	<b>1,269</b>	<b>1,084</b>	<b>15%</b>	<b>35,956</b>	<b>39,222</b>	<b>39,534</b>	<b>42,621</b>	<b>42,126</b>	<b>38,292</b>	<b>6%</b>
<b>Total Crimes</b>	<b>1,069</b>	<b>1,292</b>	<b>1,242</b>	<b>1,535</b>	<b>1,350</b>	<b>1,173</b>	<b>10%</b>	<b>41,662</b>	<b>43,784</b>	<b>44,048</b>	<b>47,066</b>	<b>46,164</b>	<b>42,154</b>	<b>1%</b>
<b>CALLS FOR SERVICE</b>														
Dispatched	6,018	6,628	6,259	6,886	7,107	6,831	14%	230,740	243,861	248,865	262,670	259,661	244,335	6%
Self-initiated	3,099	2,669	3,665	3,993	4,084	3,892	26%	202,811	176,363	185,261	192,184	173,269	189,861	-6%
<b>Total Calls for Service</b>	<b>9,117</b>	<b>9,297</b>	<b>9,924</b>	<b>10,879</b>	<b>11,191</b>	<b>10,723</b>	<b>18%</b>	<b>433,551</b>	<b>420,224</b>	<b>434,126</b>	<b>454,854</b>	<b>432,930</b>	<b>434,196</b>	<b>0%</b>

Source: Portland Police Bureau, SQL Program 1/03/07.  
 Neighborhood Trade Area totals calculated using census tracts 17.01, 17.02, 18.01, and 18.02

**Findings:**

- Total crimes on Glisan Street peaked in 2003 (1,535 crimes). Total crimes Citywide also peaked in 2003 (47,066 crimes).
- Between 2000 and 2005, crimes against persons on Glisan Street decreased by 30 percent overall, compared to the 32 percent decrease Citywide. While the City experienced a steady decline in crimes against persons, annual reported crimes on Glisan Street did not follow a consistent up or down trend. Crimes against persons on Glisan Street decreased by 24 percent between 2000 and 2001, and then increased over each of the following two years.
- Total property crimes on Glisan Street peaked in 2003 (1,428 crimes). In 2003, the number of property crimes reported on Glisan was 26 percent higher than the previous year (1,138 crimes).

- Calls for service on Glisan Street increased over the five-year period by 18 percent. In comparison, the City remained constant after a slight increase in 2003. The highest concentration of calls for service along Glisan (see Appendix G), are centered around the intersection with NE 82nd Avenue and the intersection with NE 60th Avenue. Increased calls for service on Glisan Street may be attributable, in part, to the high density housing development located near the MAX stop at NE 60th. (see Appendix G), may have contributed to the increase in calls for service.
- In 2005, Glisan Street witnessed a drop in total annual crimes, particularly in property crimes, which decreased by 15 percent. Within the property crime subgroup, there was a marked reduction in burglary and larceny, which decreased by 26 percent and 19 percent over 2004 figures. However, total crimes against persons rose somewhat (10%) during the same time period.

# Corridor Performance

## Retail Gap Analysis

**G**ap 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 Glisan 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 16 calculates the overall leakage or surplus within the Retail Trade and Food and Drink industries. Figure 10 breaks down these aggregate amounts by industry sub sector.



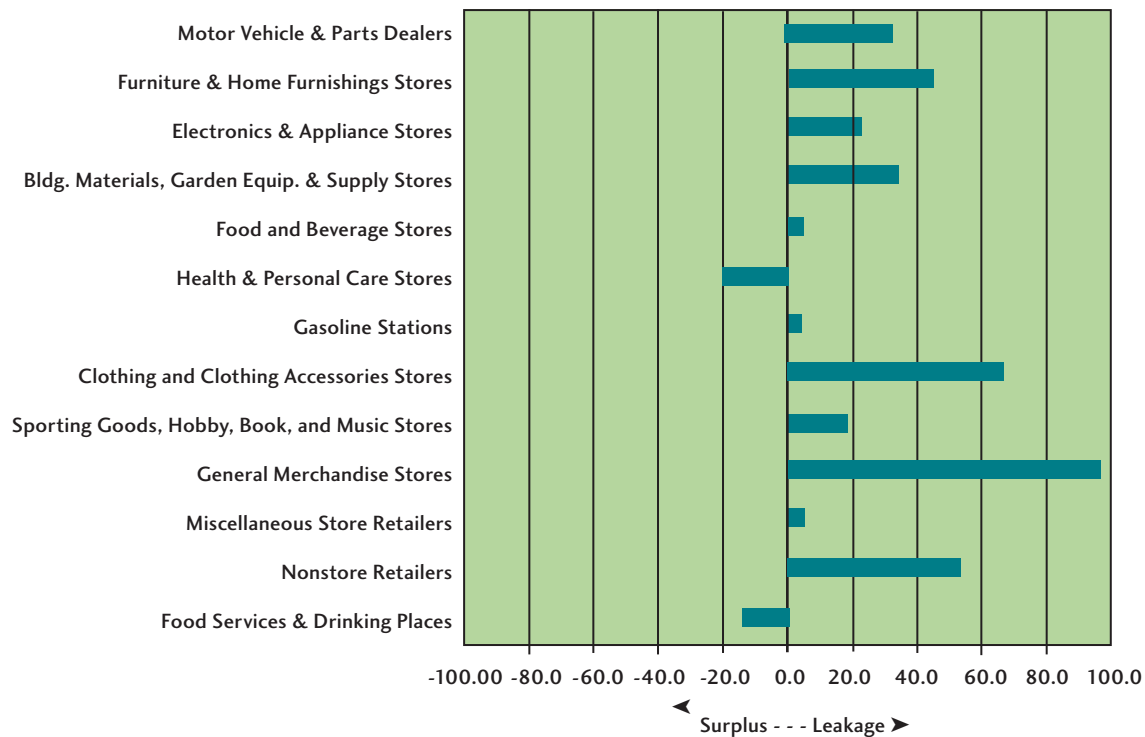
Table 16: Retail Trade and Food & Drink Industry Summary

Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Leakage (+)/ Surplus (-) (\$)	Leakage (+)/ Surplus (-) Factor <sup>1</sup>	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$ 157,756,454	\$ 232,663,624	\$ 74,907,170	19.2	163
Total Retail Trade (NAICS 44-45)	\$ 115,209,408	\$ 200,659,963	\$ 85,450,555	27.1	119
Total Food & Drink (NAICS 722)	\$ 42,547,046	\$ 32,003,661	\$ 10,543,385	-14.1	44

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

<sup>1</sup>The Leakage/Surplus Factor is a measure of consumer demand relative to supply, ranging from 100 (total leakage) to -100 (total surplus).

Figure 10: Leakage/Surplus Factor by Industry Subsector



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

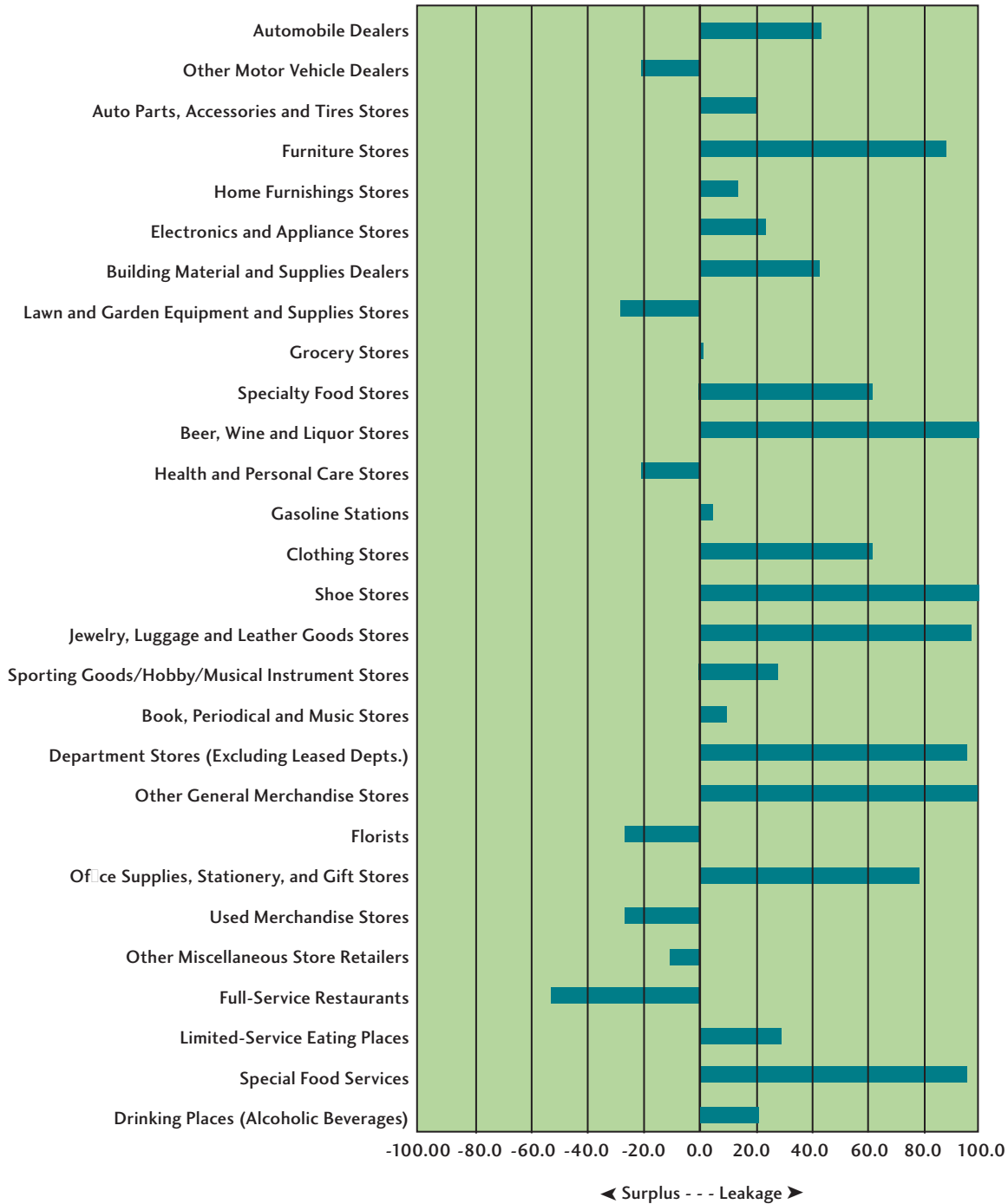
## Findings:

- Retail sales leakage of \$74,907,170 is reported within the broad Retail Trade and Food and Drink categories.
- Significant retail leakage, spread across many industry sub sectors, suggests that the demand for many neighborhood goods and services is not being met locally. Accordingly, opportunity exists for current and future businesses along the Glisan Corridor to meet the underserved market by providing goods and services that residents currently shop for outside of the neighborhood trade area.
- 78 percent of business owners in the Glisan Corridor that completed the Bureau of Planning's Business Owner Survey reported that business has either improved or stayed the same over the past five years. Given that the neighborhood as a whole has experienced notable retail leakage, it is possible that some businesses – particularly those that target the Asian community or specialize in ethnic goods and services not widely available throughout the City – have a strong customer base living outside the neighborhood trade area.
- 22 percent of Corridor business owners that responded to the Business Owner Survey reported a decline in business.
- Two industry sub sectors, Health and Personal Care Stores and Food Services and Drinking Places, generated a retail surplus of approximately \$14,081,907 million.

Figure 11 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 and underrepresented.

Figure 11: Leakage/Surplus Factor by Industry Group



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

**Findings:**

- The demand for neighborhood retail is not being met by existing businesses in many industry groups.
- There is large market potential for Beer, Wine, and Liquor Stores, Shoe Stores, Other General Merchandise Stores, Office Supplies, Stationary, and Gift Stores, and Special Food Services within the neighborhood trade area.
- Other retail potential exists; however, this potential exists for businesses not typically classified as neighborhood retailers (e.g. Furniture Stores, Jewelry, Luggage, and Leather Goods Stores, and Department Stores). These businesses generally serve larger trade areas and are therefore discussed in the community trade area findings.
- When asked to identify businesses that would complement their business, 34 percent of business owners indicated a bakery, 26 percent a coffee shop, 22 percent a specialty grocer, 20 percent a retail music store, 20 percent a health food store, and 20 percent a bookstore.

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

## COMMUNITY TRADE AREA GAP ANALYSIS

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

**Table 17: Retail Trade and Food & Drink Industry Summary**

Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Leakage (+)/ Surplus (-) (\$)	Leakage (+)/ Surplus (-) <sup>1</sup> Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$ 901,206,488	\$ 952,907,573	\$ 51,701,085	2.8	863
Total Retail Trade (NAICS 44-45)	\$ 727,287,582	\$ 821,888,051	\$ 94,600,469	6.1	589
Total Food & Drink (NAICS 722)	\$ 173,918,906	\$ 131,019,522	-\$ 42,899,384	-14.1	274

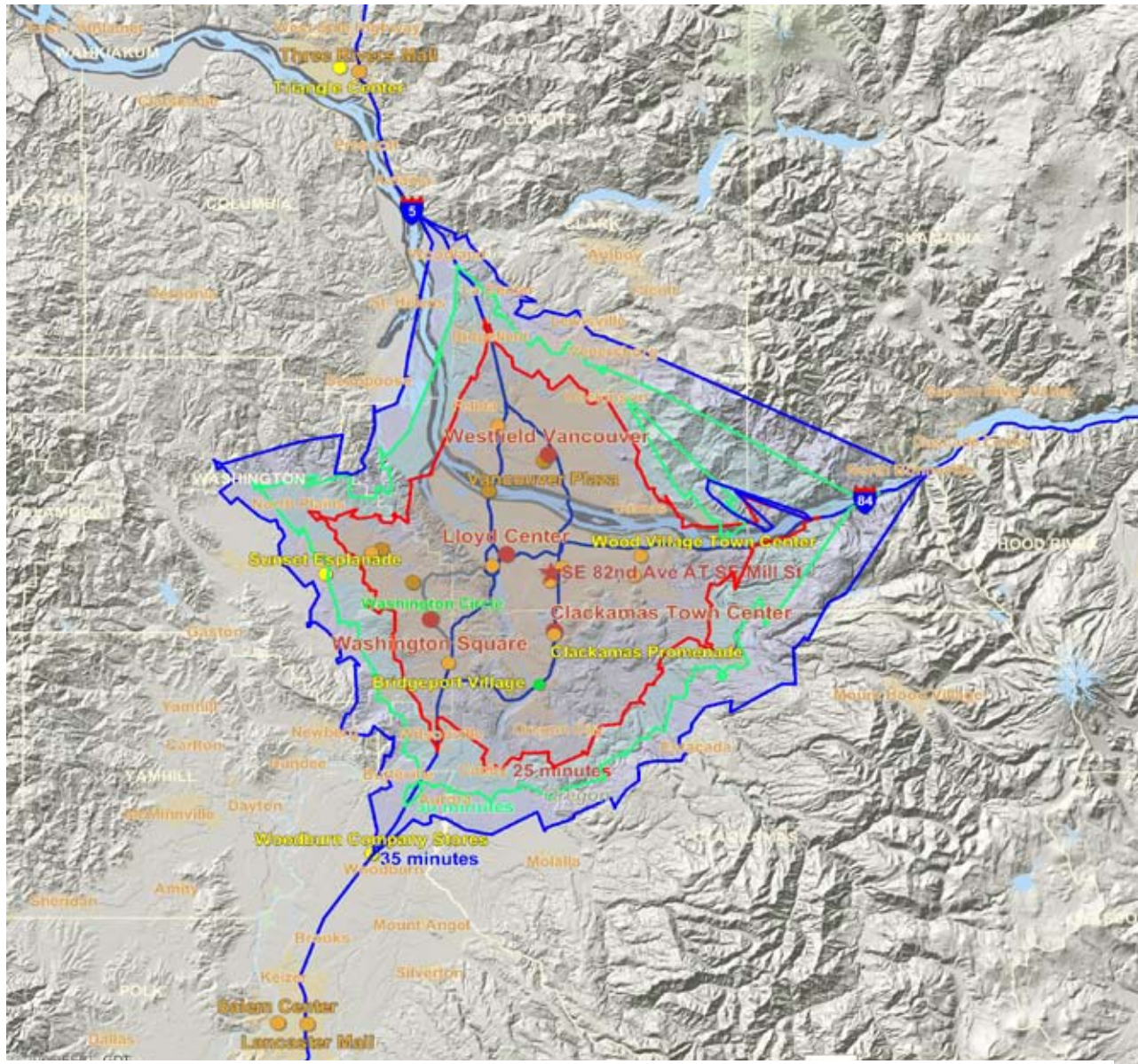
Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2005.

**Findings:**

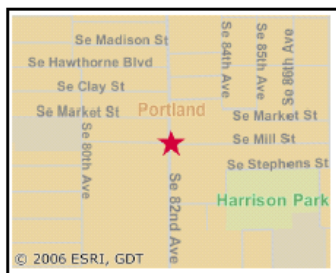
- Retail sales leakage is reported within the Retail Trade and Food and Drink industries (NAICS 44-45, 722), which generated an overall leakage of \$51,701,085 in 2005. This suggests that the community trade area, which has nearly four times the number of households as the neighborhood trade area is, overall, not meeting the retail demands of residents in the area..
- Unlike the neighborhood trade area, the community trade area features several large format retailers, including but not limited to Target, Wal-Mart, and Home Depot. 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 12: Major Shopping Centers in the Portland Metro Region



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



**Major Shopping Centers by Gross Leasable Area**

- More than 800,000 sq ft
- 500,001 - 800,000 sq ft
- 300,001 - 500,000 sq ft
- 200,001 - 300,000 sq ft
- Up to 200,001 sq ft

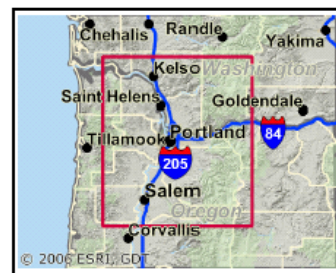
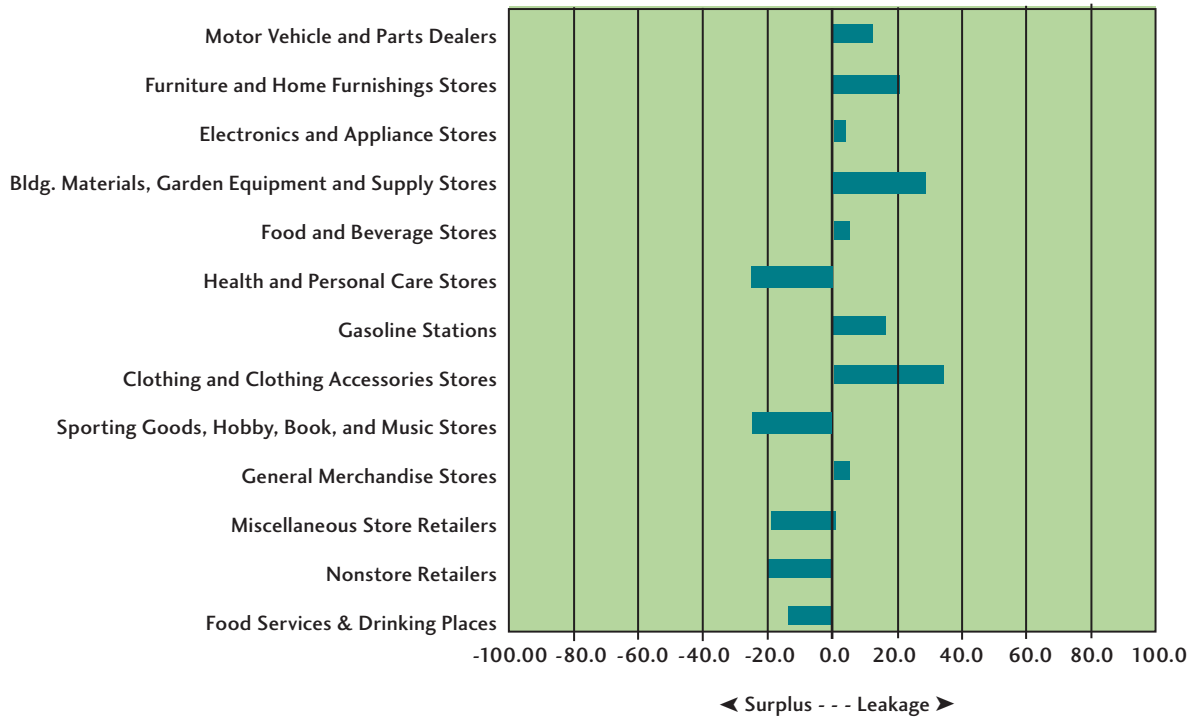


Figure 12 shows retail leakage/surplus by industry sub sector. Figure 14 shows retail leakage/surplus by more detailed industry groups.

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

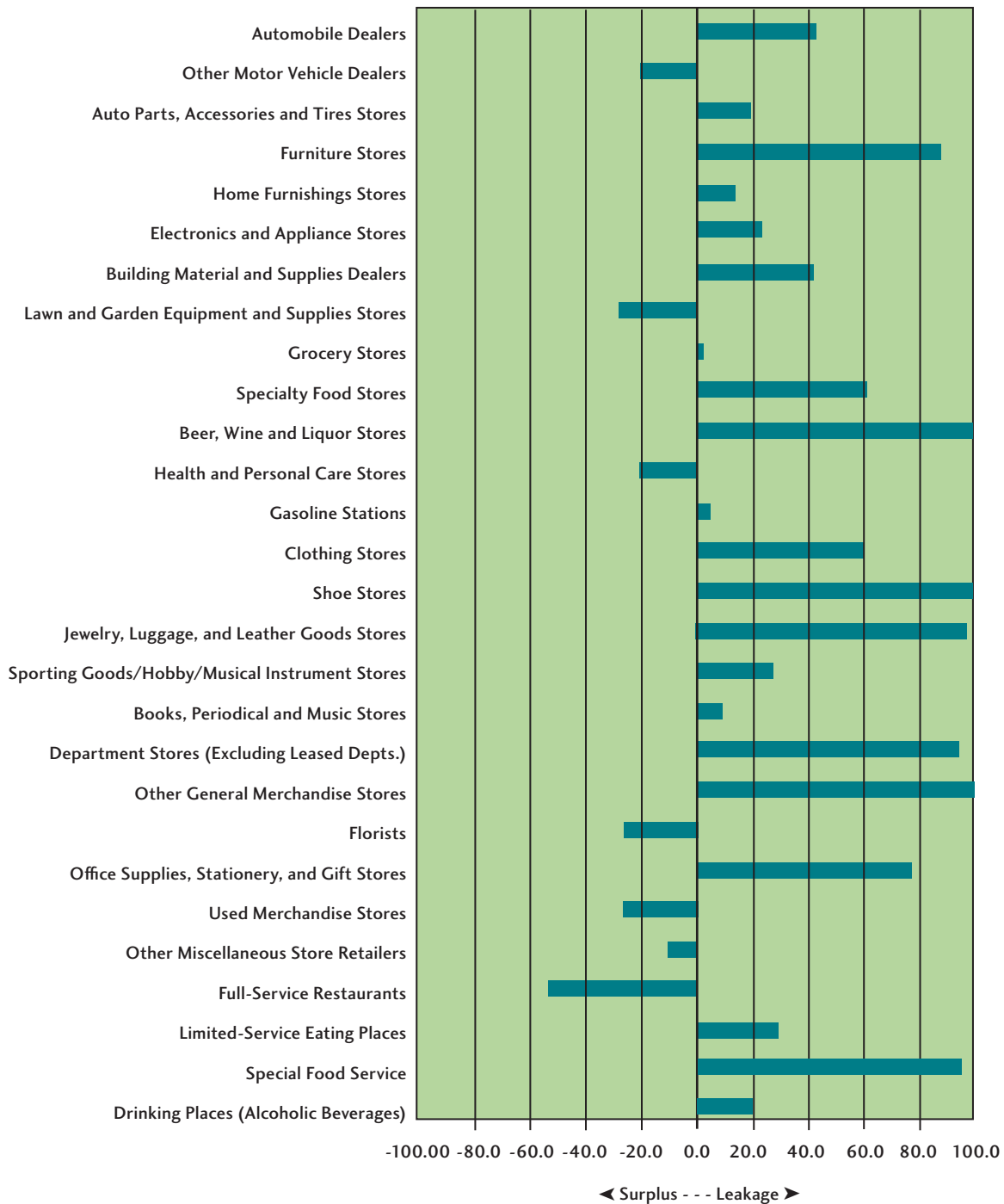


Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, All rights reserved. ESRI estimates for 2005.

**Findings:**

- In 2005, the Health and Personal Care, Sporting Goods, Hobby, Book, and Music Stores, Miscellaneous Store Retailers, Non-store Retailers, and Food Services and Drinking Places industry sub-sectors outperformed other sub-sectors in the community trade area. These sub-sectors generated a \$93,731,505 retail surplus.
- As a whole, the community trade area outperformed the neighborhood trade area, where only two sub sectors (Health and Personal Care Stores and Food Services and Drinking Places) generated a retail surplus in 2005. The community trade area’s greater capacity to serve the local market is not surprising considering the occurrence of retail leakage in almost every sub-sector within the Glisan Street Neighborhood Trade Area.
- While some industry sub-sectors in the community trade area generated a retail surplus, a majority of industry sub-sectors experienced retail leakage. Accordingly, the area may be able to support new (or existing) businesses within these sub sectors. The industry sub sectors that experienced the most significant leakage - Clothing and Clothing Accessories Stores and Building Materials, Garden Equipment and Supply Stores - could be the strongest opportunities for new businesses in the corridor.

Figure 14: Leakage/Surplus Factor by Industry Group (Community Trade Area)



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

### Findings:

- Existing businesses within the community trade area do not satisfy all of the consumer needs of area households.
- Nevertheless, several industry groups – Lawn and Garden Equipment Supplies Stores, Health and Personal Care Stores, Florists, Used Merchandise Stores, Florists, Other Miscellaneous Store Retailers, and Full-Service Restaurants – experienced a retail surplus in 2005.
- Beer, Wine, and Liquor Stores, Shoe Stores, and Other General Merchandise Stores are the three industry sub sectors experiencing the greatest retail leakage in the Glisan 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

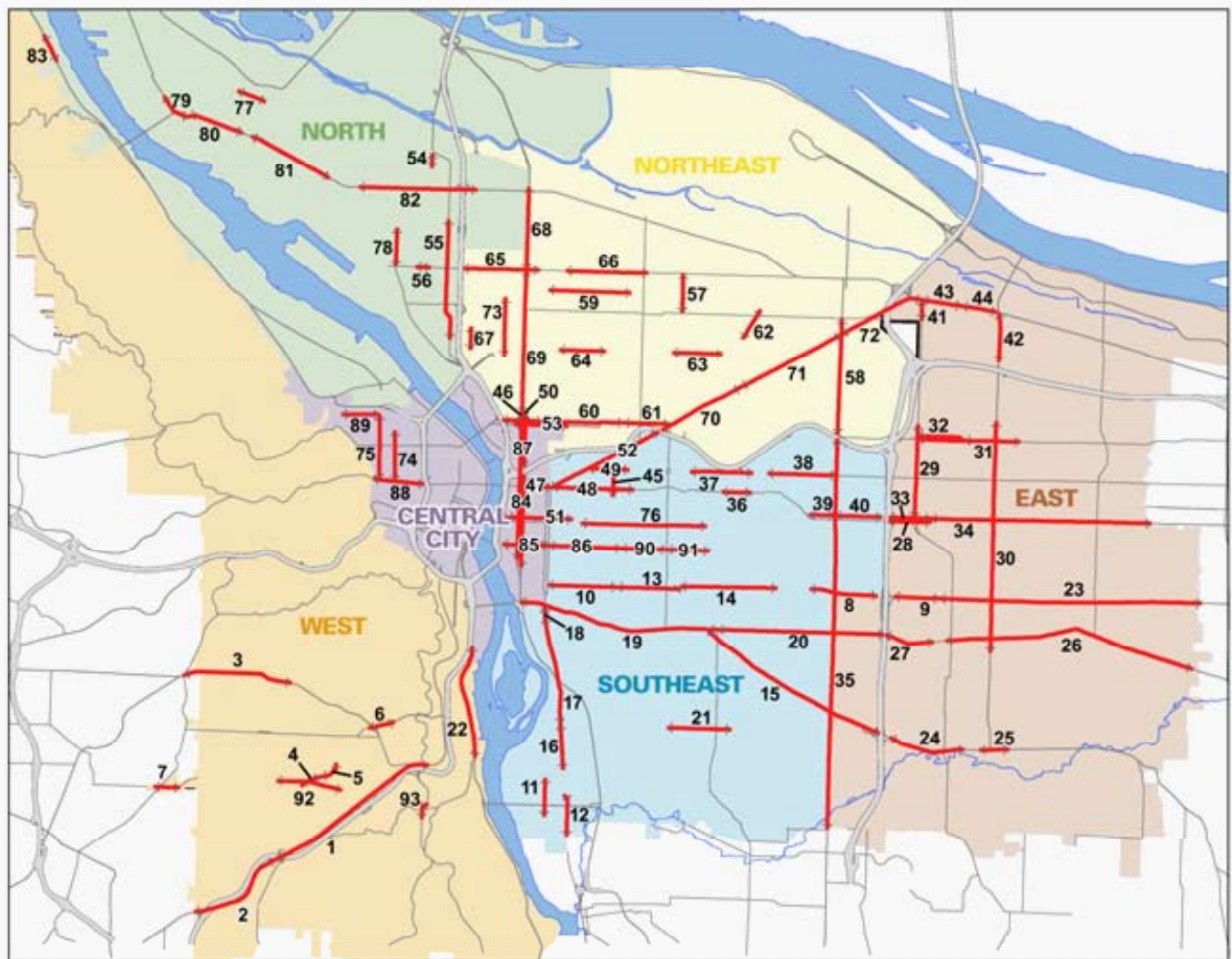
INTERNAL	<b>Strengths</b> <ul style="list-style-type: none"> <li>• Transportation options: highway, public transportation</li> <li>• Long-term locally-owned businesses</li> <li>• Population increase</li> <li>• Growing Asian-owned businesses</li> <li>• Low-rent/affordable</li> <li>• Offers some niche markets</li> <li>• Fred Meyer's/Petco shopping center</li> <li>• Single-family detached housing along the corridor</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>• Uninviting pedestrian environment</li> <li>• Poor interconnectivity</li> <li>• Age and condition of the buildings</li> <li>• Underutilized and obsolete development sites</li> <li>• Multiple ownership makes redevelopment a challenge</li> <li>• Compatibility with adjacent residential neighborhoods is not clear</li> <li>• On-street parking</li> <li>• Substandard residential housing</li> <li>• Lack of a business association or community based organization</li> <li>• Dispersed commercial development</li> <li>• Lacks clustering of businesses</li> <li>• Not a lot of restaurants</li> <li>• Lacks neighborhood-serving businesses due to presence of Fred Meyer as a competitor</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>• Successful retail destinations attract potential residents</li> <li>• Strategic location provides for strong commercial and housing opportunities</li> <li>• Redevelopment potential: higher density development along corridor</li> <li>• Sign and façade program</li> <li>• Design changes and organizational capacity building</li> <li>• Build-up niche market</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>• Close to other major corridors and big box retailer</li> <li>• Gentrification concerns</li> <li>• Lack of Business Association to speak on behalf of Glisan Corridor businesses</li> <li>• Declining government resources</li> </ul>
EXTERNAL		



Glisan Street's Eclectic Style!

# 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	<input type="checkbox"/>	Appearance of signs	<input type="checkbox"/>
Selection of services	<input type="checkbox"/>	Cleanliness	<input type="checkbox"/>
Shopping hours	<input type="checkbox"/>	Safety	<input type="checkbox"/>
Quality of businesses	<input type="checkbox"/>	Number of events and promotions	<input type="checkbox"/>
Number of parking spaces	<input type="checkbox"/>	Traffic circulation	<input type="checkbox"/>
Customer service	<input type="checkbox"/>	Loading zones	<input type="checkbox"/>
Places to eat	<input type="checkbox"/>	Entertainment/culture	<input type="checkbox"/>
Prices of goods	<input type="checkbox"/>	Appearance of buildings	<input type="checkbox"/>

**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	<input type="checkbox"/>	Utility costs/availability	<input type="checkbox"/>	Difficulty recruiting staff	<input type="checkbox"/>
Financing	<input type="checkbox"/>	Product costs/availability	<input type="checkbox"/>	Difficulty retaining staff	<input type="checkbox"/>
Shoplifting, theft	<input type="checkbox"/>	In-city competition	<input type="checkbox"/>	Health insurance costs	<input type="checkbox"/>
Personnel Costs	<input type="checkbox"/>	Out-of-city competition	<input type="checkbox"/>	Vandalism	<input type="checkbox"/>
Shipping/transport costs	<input type="checkbox"/>	Taxes, business fees	<input type="checkbox"/>	Government regulations	<input type="checkbox"/>
Other (Please list)	<input type="checkbox"/>				

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

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

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

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  
 1900 SW Fourth Avenue, Suite 7100  
 Portland, OR 97201-5350

# Appendix C:

## DEMOGRAPHIC AND HOUSING DATA



### Demographic and Income Profile

**NE 69th Ave AT NE Glisan St**  
**Portland, OR 97213**

**Latitude: 45.5264**  
**Longitude: -122.5924**  
**Radius: 1.0 miles**

Summary	2000	2006	2011
Population	22,165	22,579	23,201
Households	9,293	9,433	9,683
Families	5,027	5,027	5,073
Average Household Size	2.29	2.30	2.30
Owner Occupied HUs	5,057	5,335	5,523
Renter Occupied HUs	4,236	4,098	4,159
Median Age	35.3	36.9	38.4

Trends: 2006-2011 Annual Rate	Area	State	National
Population	0.54%	1.23%	1.30%
Households	0.52%	1.23%	1.33%
Families	0.18%	1.02%	1.08%
Owner HHs	0.7%	1.27%	1.41%
Median Household Income	3.78%	3.29%	3.32%

Households by Income	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	1,268	13.6%	990	10.5%	828	8.6%
\$15,000 - \$24,999	1,435	15.4%	971	10.3%	733	7.6%
\$25,000 - \$34,999	1,355	14.6%	1,138	12.1%	986	10.2%
\$35,000 - \$49,999	1,738	18.7%	1,605	17.0%	1,433	14.8%
\$50,000 - \$74,999	1,911	20.6%	2,076	22.0%	2,073	21.4%
\$75,000 - \$99,999	902	9.7%	1,254	13.3%	1,378	14.2%
\$100,000 - \$149,999	505	5.4%	958	10.2%	1,554	16.1%
\$150,000 - \$199,999	51	0.5%	285	3.0%	361	3.7%
\$200,000+	129	1.4%	157	1.7%	336	3.5%
Median Household Income	\$39,896		\$50,120		\$60,346	
Average Household Income	\$49,303		\$62,829		\$75,716	
Per Capita Income	\$20,950		\$26,600		\$31,928	

Population by Age	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	1,351	6.1%	1,310	5.8%	1,349	5.8%
5 - 9	1,241	5.6%	1,244	5.5%	1,137	4.9%
10 - 14	1,151	5.2%	1,239	5.5%	1,221	5.3%
15 - 19	1,424	6.4%	1,498	6.6%	1,479	6.4%
20 - 24	1,706	7.7%	1,606	7.1%	1,868	8.1%
25 - 34	4,095	18.5%	3,661	16.2%	3,423	14.8%
35 - 44	3,744	16.9%	3,689	16.3%	3,588	15.5%
45 - 54	3,189	14.4%	3,605	16.0%	3,476	15.0%
55 - 64	1,527	6.9%	2,199	9.7%	3,064	13.2%
65 - 74	1,126	5.1%	1,041	4.6%	1,195	5.2%
75 - 84	1,111	5.0%	914	4.0%	800	3.4%
85+	501	2.3%	575	2.5%	600	2.6%

Race and Ethnicity	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
White Alone	17,306	78.1%	16,915	74.9%	16,753	72.2%
Black Alone	747	3.4%	829	3.7%	898	3.9%
American Indian Alone	189	0.9%	189	0.8%	191	0.8%
Asian Alone	2,280	10.3%	2,720	12.0%	3,147	13.6%
Pacific Islander Alone	85	0.4%	93	0.4%	99	0.4%
Some Other Race Alone	629	2.8%	828	3.7%	1,030	4.4%
Two or More Races	929	4.2%	1,006	4.5%	1,082	4.7%
Hispanic Origin (Any Race)	1,309	5.9%	1,724	7.6%	2,147	9.3%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2006 and 2011.

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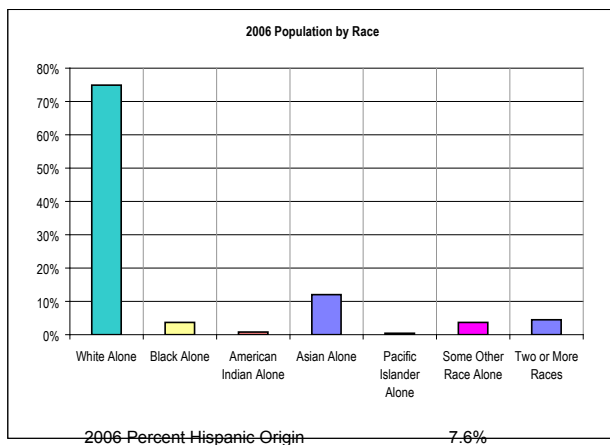
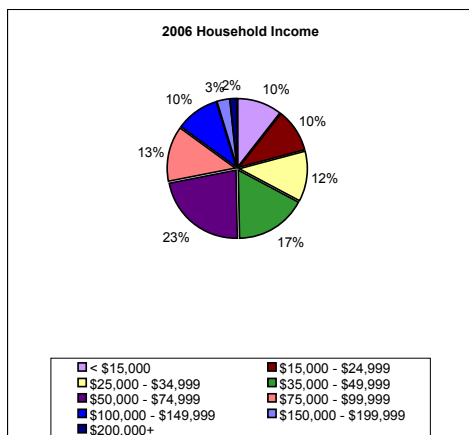
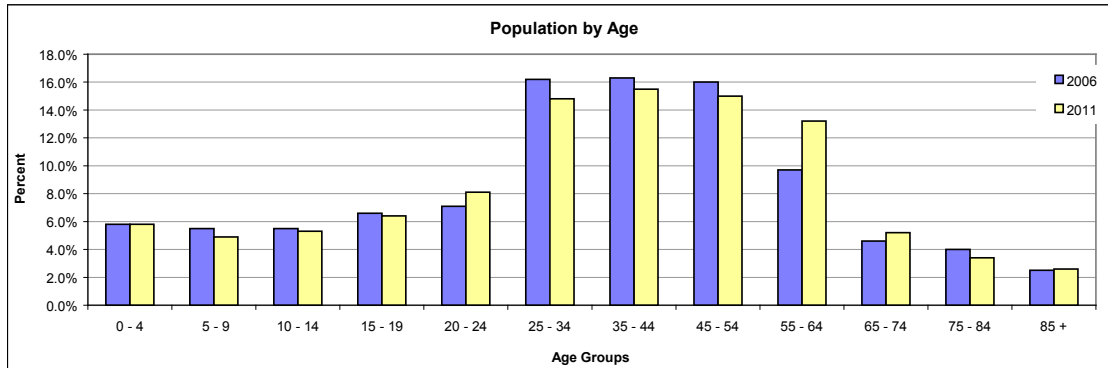
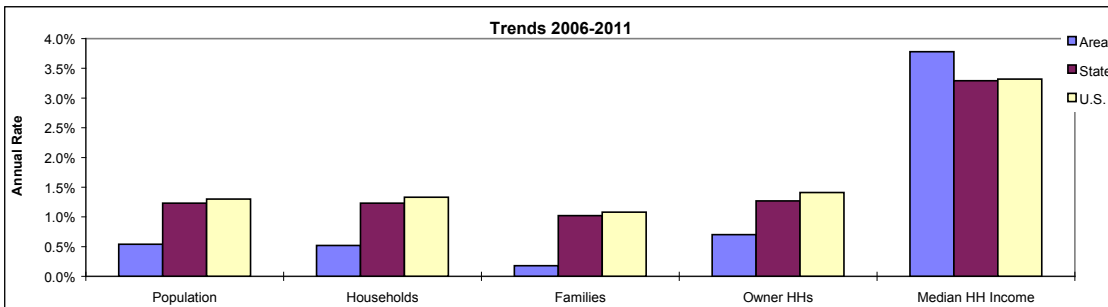


## Demographic and Income Profile

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 1.0 miles



Source: ESRI forecasts for 2006 and 2011.  
© 2006 ESRI



## Demographic and Income Profile

<b>NE 69th Ave AT NE Glisan St</b>		<b>Latitude: 45.5264</b>				
<b>Portland, OR 97213</b>		<b>Longitude: -122.5924</b>				
<b>Site Type:</b>	<b>Radius</b>	<b>Radius:</b>	<b>2.0 miles</b>			
<b>Summary</b>	<b>2000</b>	<b>2006</b>	<b>2011</b>			
Population	84,245	86,150	88,787			
Households	35,259	35,900	36,935			
Families	19,530	19,683	19,958			
Average Household Size	2.32	2.34	2.34			
Owner Occupied HUs	21,627	22,665	23,361			
Renter Occupied HUs	13,632	13,235	13,574			
Median Age	36.2	37.8	39.3			
<b>Trends: 2006-2011 Annual Rate</b>	<b>Area</b>	<b>State</b>	<b>National</b>			
Population	0.6%	1.23%	1.30%			
Households	0.57%	1.23%	1.33%			
Families	0.28%	1.02%	1.08%			
Owner HHs	0.61%	1.27%	1.41%			
Median Household Income	3.52%	3.29%	3.32%			
	<b>2000</b>	<b>2006</b>	<b>2011</b>			
<b>Households by Income</b>	Number	Percent	Number	Percent	Number	Percent
< \$15,000	4,410	12.5%	3,320	9.2%	2,760	7.5%
\$15,000 - \$24,999	4,519	12.8%	3,285	9.2%	2,587	7.0%
\$25,000 - \$34,999	4,823	13.7%	3,707	10.3%	3,139	8.5%
\$35,000 - \$49,999	6,128	17.4%	5,857	16.3%	4,974	13.5%
\$50,000 - \$74,999	8,066	22.9%	7,863	21.9%	7,504	20.3%
\$75,000 - \$99,999	3,968	11.3%	5,353	14.9%	5,767	15.6%
\$100,000 - \$149,999	2,402	6.8%	4,418	12.3%	6,675	18.1%
\$150,000 - \$199,999	403	1.1%	1,314	3.7%	1,915	5.2%
\$200,000+	495	1.4%	782	2.2%	1,614	4.4%
Median Household Income	\$44,285		\$55,259		\$65,697	
Average Household Income	\$53,305		\$67,998		\$82,601	
Per Capita Income	\$22,695		\$28,702		\$34,737	
	<b>2000</b>	<b>2006</b>	<b>2011</b>			
<b>Population by Age</b>	Number	Percent	Number	Percent	Number	Percent
0 - 4	5,029	6.0%	4,932	5.7%	5,107	5.8%
5 - 9	4,601	5.5%	4,719	5.5%	4,345	4.9%
10 - 14	4,534	5.4%	4,559	5.3%	4,736	5.3%
15 - 19	4,989	5.9%	5,135	6.0%	4,879	5.5%
20 - 24	5,855	6.9%	5,832	6.8%	6,683	7.5%
25 - 34	15,341	18.2%	13,781	16.0%	12,996	14.6%
35 - 44	14,334	17.0%	14,179	16.5%	13,898	15.7%
45 - 54	12,963	15.4%	14,013	16.3%	13,487	15.2%
55 - 64	6,035	7.2%	9,049	10.5%	12,305	13.9%
65 - 74	4,459	5.3%	4,096	4.8%	4,846	5.5%
75 - 84	4,340	5.2%	3,731	4.3%	3,256	3.7%
85+	1,767	2.1%	2,123	2.5%	2,248	2.5%
	<b>2000</b>	<b>2006</b>	<b>2011</b>			
<b>Race and Ethnicity</b>	Number	Percent	Number	Percent	Number	Percent
White Alone	68,188	80.9%	67,039	77.8%	66,763	75.2%
Black Alone	2,432	2.9%	2,747	3.2%	3,009	3.4%
American Indian Alone	691	0.8%	692	0.8%	705	0.8%
Asian Alone	7,682	9.1%	9,379	10.9%	11,010	12.4%
Pacific Islander Alone	258	0.3%	285	0.3%	309	0.3%
Some Other Race Alone	1,953	2.3%	2,653	3.1%	3,340	3.8%
Two or More Races	3,042	3.6%	3,355	3.9%	3,650	4.1%
Hispanic Origin (Any Race)	4,217	5.0%	5,675	6.6%	7,170	8.1%

Data Note: Income is expressed in current dollars.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2006 and 2011.

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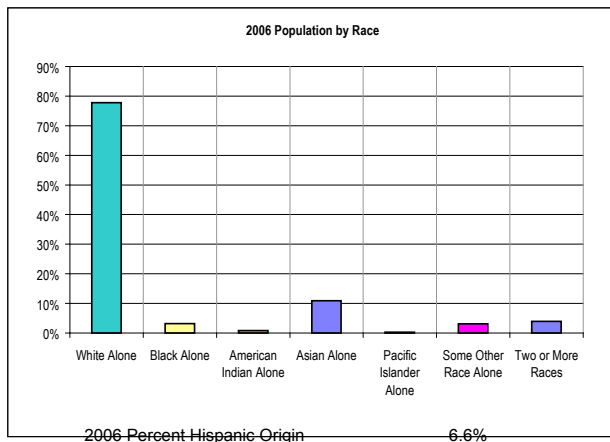
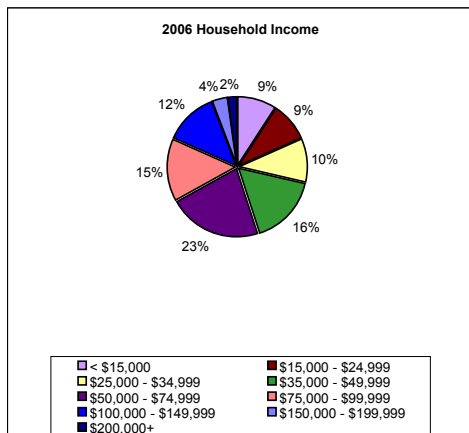
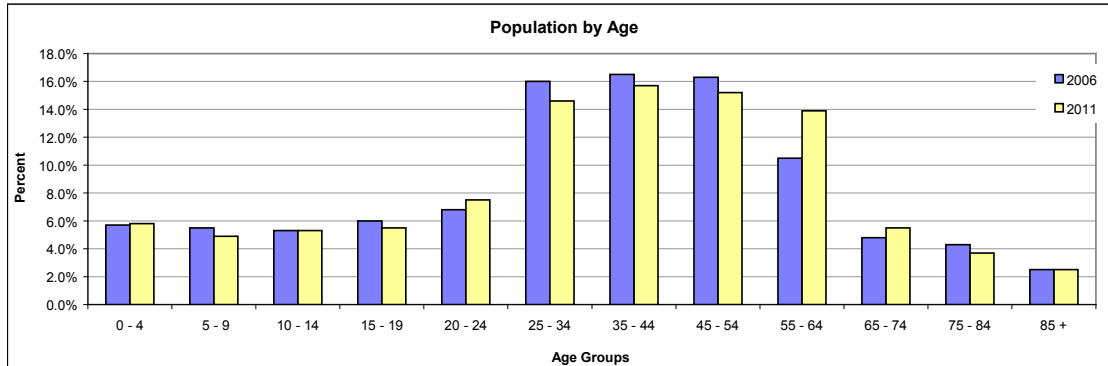
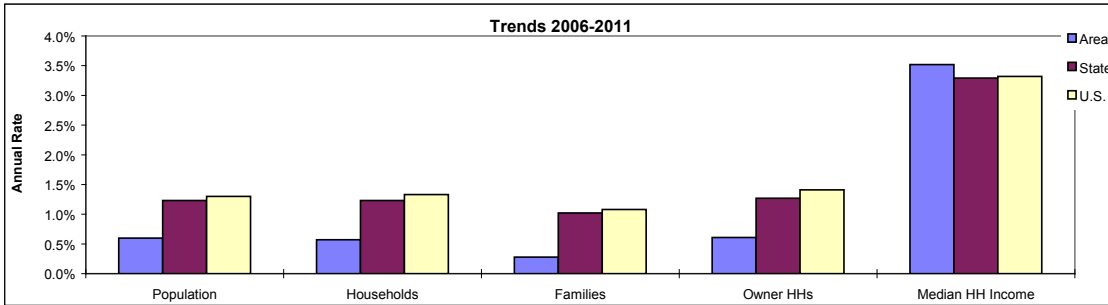


## Demographic and Income Profile

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 2.0 miles



Source: ESRI forecasts for 2006 and 2011.  
© 2006 ESRI



## Housing Profile

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 1.0 miles

2000 Total Population	22,165	2000 Median HH Income	\$39,896
2006 Total Population	22,579	2006 Median HH Income	\$50,120
2011 Total Population	23,201	2011 Median HH Income	\$60,346
2006-2011 Annual Rate	0.54%	2006-2011 Annual Rate	3.78%

### Housing Units by Occupancy Status and Tenure

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	9,752	100.0%	10,049	100.0%	10,397	100.0%
Occupied	9,293	95.3%	9,433	93.9%	9,682	93.1%
Owner	5,057	51.9%	5,335	53.1%	5,523	53.1%
Renter	4,236	43.4%	4,098	40.8%	4,159	40.0%
Vacant	459	4.7%	616	6.1%	715	6.9%

### Owner Occupied Housing Units by Value

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total	5,024	100.0%	5,336	100.0%	5,521	100.0%
< \$10,000	6	0.1%	5	0.1%	4	0.1%
\$10,000 - \$14,999	0	0.0%	3	0.1%	2	0.0%
\$15,000 - \$19,999	1	0.0%	1	0.0%	3	0.1%
\$20,000 - \$24,999	1	0.0%	0	0.0%	1	0.0%
\$25,000 - \$29,999	4	0.1%	1	0.0%	0	0.0%
\$30,000 - \$34,999	7	0.1%	1	0.0%	0	0.0%
\$35,000 - \$39,999	0	0.0%	1	0.0%	0	0.0%
\$40,000 - \$49,999	11	0.2%	8	0.1%	2	0.0%
\$50,000 - \$59,999	5	0.1%	6	0.1%	5	0.1%
\$60,000 - \$69,999	41	0.8%	7	0.1%	6	0.1%
\$70,000 - \$79,999	48	1.0%	8	0.1%	4	0.1%
\$80,000 - \$89,999	107	2.1%	3	0.1%	5	0.1%
\$90,000 - \$99,999	246	4.9%	16	0.3%	6	0.1%
\$100,000 - \$124,999	856	17.0%	100	1.9%	16	0.3%
\$125,000 - \$149,999	1,320	26.3%	214	4.0%	70	1.3%
\$150,000 - \$174,999	873	17.4%	544	10.2%	135	2.4%
\$175,000 - \$199,999	587	11.7%	592	11.1%	203	3.7%
\$200,000 - \$249,999	478	9.5%	1,559	29.2%	982	17.8%
\$250,000 - \$299,999	244	4.9%	1,007	18.9%	1,158	21.0%
\$300,000 - \$399,999	136	2.7%	795	14.9%	1,746	31.6%
\$400,000 - \$499,999	40	0.8%	297	5.6%	576	10.4%
\$500,000 - \$749,999	7	0.1%	145	2.7%	476	8.6%
\$750,000 - \$999,999	0	0.0%	15	0.3%	100	1.8%
\$1,000,000 +	6	0.1%	8	0.1%	21	0.4%
Median Value	\$147,330		\$237,139		\$309,078	
Average Value	\$163,642		\$261,830		\$343,153	

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 2006 and 2011.



## Housing Profile

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 1.0 miles

### Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	459	100.0%
For Rent	217	47.3%
For Sale Only	83	18.1%
Rented/Sold, Unoccupied	48	10.5%
Seasonal/Recreational/Occasional Use	12	2.6%
For Migrant Workers	0	0.0%
Other Vacant	99	21.6%

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

	Occupied Units		Owner Occupied Units	
	Number	% of Occupied	Number	% of Occupied
Total	9,294	54.4%	5,057	54.4%
15 - 24	529	9.8%	52	9.8%
25 - 34	1,942	36.4%	706	36.4%
35 - 44	2,100	56.5%	1,187	56.5%
45 - 54	1,983	64.2%	1,273	64.2%
55 - 64	985	63.2%	623	63.2%
65 - 74	733	67.9%	498	67.9%
75 - 84	758	71.6%	543	71.6%
85+	264	66.3%	175	66.3%

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

	Occupied Units		Owner Occupied Units	
	Number	% of Occupied	Number	% of Occupied
Total	9,291	54.4%	5,056	54.4%
White Alone	7,894	57.5%	4,539	57.5%
Black Alone	270	19.3%	52	19.3%
American Indian Alone	62	46.8%	29	46.8%
Asian Alone	650	47.4%	308	47.4%
Pacific Islander Alone	23	17.4%	4	17.4%
Some Other Race Alone	156	23.1%	36	23.1%
Two or More Races	236	37.3%	88	37.3%
Hispanic Origin	333	28.8%	96	28.8%

### Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	9,778	100.0%	9,310	100.0%
1, Detached	6,093	62.3%	5,806	62.4%
1, Attached	234	2.4%	231	2.5%
2	770	7.9%	719	7.7%
3 to 4	734	7.5%	701	7.5%
5 to 9	570	5.8%	543	5.8%
10 to 19	637	6.5%	597	6.4%
20 to 49	482	4.9%	456	4.9%
50 or More	242	2.5%	241	2.6%
Mobile Home	16	0.2%	16	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

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 1.0 miles

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

	Number	Percent
Total	4,569	100.0%
With Mortgage	3,420	74.9%
< \$200	0	0.0%
\$200 - \$299	0	0.0%
\$300 - \$399	9	0.2%
\$400 - \$499	50	1.1%
\$500 - \$599	93	2.0%
\$600 - \$699	220	4.8%
\$700 - \$799	333	7.3%
\$800 - \$899	369	8.1%
\$900 - \$999	340	7.4%
\$1000 - \$1249	843	18.5%
\$1250 - \$1499	543	11.9%
\$1500 - \$1999	483	10.6%
\$2000 - \$2499	98	2.1%
\$2500 - \$2999	23	0.5%
\$3000+	16	0.4%
With No Mortgage	1,149	25.1%
Median Monthly Owner Costs for Units with Mortgage	\$1,088	
Average Monthly Owner Costs for Units with Mortgage	\$1,144	

### Census 2000 Specified Renter Occupied Housing Units by Contract Rent

	Number	Percent
Total	4,287	100.0%
Paying Cash Rent	4,182	97.6%
< \$100	34	0.8%
\$100 - \$149	26	0.6%
\$150 - \$199	87	2.0%
\$200 - \$249	25	0.6%
\$250 - \$299	60	1.4%
\$300 - \$349	94	2.2%
\$350 - \$399	124	2.9%
\$400 - \$449	262	6.1%
\$450 - \$499	451	10.5%
\$500 - \$549	785	18.3%
\$550 - \$599	660	15.4%
\$600 - \$649	337	7.9%
\$650 - \$699	304	7.1%
\$700 - \$749	298	7.0%
\$750 - \$799	186	4.3%
\$800 - \$899	208	4.9%
\$900 - \$999	118	2.8%
\$1000 - \$1249	95	2.2%
\$1250 - \$1499	14	0.3%
\$1500 - \$1999	7	0.2%
\$2000 +	7	0.2%
No Cash Rent	105	2.4%
Median Rent	\$561	
Average Rent	\$578	
Average Gross Rent (with Utilities)	\$661	

**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

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 2.0 miles

2000 Total Population	84,245	2000 Median HH Income	\$44,285
2006 Total Population	86,150	2006 Median HH Income	\$55,259
2011 Total Population	88,787	2011 Median HH Income	\$65,697
2006-2011 Annual Rate	0.6%	2006-2011 Annual Rate	3.52%

### Housing Units by Occupancy Status and Tenure

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	36,863	100.0%	38,254	100.0%	39,679	100.0%
Occupied	35,259	95.6%	35,900	93.8%	36,935	93.1%
Owner	21,627	58.7%	22,665	59.2%	23,361	58.9%
Renter	13,632	37.0%	13,235	34.6%	13,574	34.2%
Vacant	1,604	4.4%	2,354	6.2%	2,744	6.9%

### Owner Occupied Housing Units by Value

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total	21,743	100.0%	22,663	100.0%	23,358	100.0%
< \$10,000	14	0.1%	12	0.1%	10	0.0%
\$10,000 - \$14,999	20	0.1%	6	0.0%	4	0.0%
\$15,000 - \$19,999	24	0.1%	11	0.0%	5	0.0%
\$20,000 - \$24,999	6	0.0%	17	0.1%	8	0.0%
\$25,000 - \$29,999	18	0.1%	14	0.1%	14	0.1%
\$30,000 - \$34,999	21	0.1%	12	0.1%	15	0.1%
\$35,000 - \$39,999	0	0.0%	4	0.0%	10	0.0%
\$40,000 - \$49,999	32	0.1%	29	0.1%	15	0.1%
\$50,000 - \$59,999	91	0.4%	17	0.1%	18	0.1%
\$60,000 - \$69,999	87	0.4%	17	0.1%	20	0.1%
\$70,000 - \$79,999	184	0.8%	22	0.1%	12	0.1%
\$80,000 - \$89,999	398	1.8%	69	0.3%	14	0.1%
\$90,000 - \$99,999	703	3.2%	66	0.3%	17	0.1%
\$100,000 - \$124,999	3,032	13.9%	314	1.4%	119	0.5%
\$125,000 - \$149,999	4,897	22.5%	697	3.1%	228	1.0%
\$150,000 - \$174,999	4,144	19.1%	1,755	7.7%	426	1.8%
\$175,000 - \$199,999	2,761	12.7%	2,074	9.2%	659	2.8%
\$200,000 - \$249,999	2,678	12.3%	6,053	26.7%	3,282	14.1%
\$250,000 - \$299,999	1,458	6.7%	4,722	20.8%	4,432	19.0%
\$300,000 - \$399,999	875	4.0%	4,069	18.0%	7,661	32.8%
\$400,000 - \$499,999	198	0.9%	1,703	7.5%	2,988	12.8%
\$500,000 - \$749,999	74	0.3%	835	3.7%	2,671	11.4%
\$750,000 - \$999,999	15	0.1%	90	0.4%	598	2.6%
\$1,000,000 +	13	0.1%	55	0.2%	132	0.6%
Median Value	\$158,111		\$251,509		\$330,949	
Average Value	\$175,154		\$279,943		\$367,610	

**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 2006 and 2011.



## Housing Profile

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 2.0 miles

### Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	1,604	100.0%
For Rent	755	47.1%
For Sale Only	304	19.0%
Rented/Sold, Unoccupied	168	10.5%
Seasonal/Recreational/Occasional Use	61	3.8%
For Migrant Workers	0	0.0%
Other Vacant	316	19.7%

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

	Occupied Units		Owner Occupied Units	
	Number	Percent	Number	% of Occupied
Total	35,259		21,627	61.3%
15 - 24	1,778		189	10.6%
25 - 34	7,176		3,068	42.8%
35 - 44	7,962		5,144	64.6%
45 - 54	7,775		5,610	72.2%
55 - 64	3,755		2,690	71.6%
65 - 74	2,821		2,088	74.0%
75 - 84	2,907		2,154	74.1%
85+	1,085		684	63.0%

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

	Occupied Units		Owner Occupied Units	
	Number	Percent	Number	% of Occupied
Total	35,260		21,628	61.3%
White Alone	30,547		19,495	63.8%
Black Alone	876		211	24.1%
American Indian Alone	257		125	48.6%
Asian Alone	2,202		1,301	59.1%
Pacific Islander Alone	68		16	23.5%
Some Other Race Alone	511		150	29.4%
Two or More Races	799		330	41.3%
Hispanic Origin	1,150		416	36.2%

### Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	36,881	100.0%	35,265	100.0%
1, Detached	26,029	70.6%	25,111	71.2%
1, Attached	543	1.5%	516	1.5%
2	1,780	4.8%	1,659	4.7%
3 to 4	1,869	5.1%	1,742	4.9%
5 to 9	1,564	4.2%	1,468	4.2%
10 to 19	2,027	5.5%	1,893	5.4%
20 to 49	1,552	4.2%	1,444	4.1%
50 or More	1,452	3.9%	1,369	3.9%
Mobile Home	60	0.2%	58	0.2%
Other	5	0.0%	5	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

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 2.0 miles

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

	Number	Percent
Total	20,469	100.0%
With Mortgage	15,244	74.5%
< \$200	6	0.0%
\$200 - \$299	0	0.0%
\$300 - \$399	82	0.4%
\$400 - \$499	223	1.1%
\$500 - \$599	362	1.8%
\$600 - \$699	815	4.0%
\$700 - \$799	1,222	6.0%
\$800 - \$899	1,332	6.5%
\$900 - \$999	1,591	7.8%
\$1000 - \$1249	3,550	17.3%
\$1250 - \$1499	2,711	13.2%
\$1500 - \$1999	2,433	11.9%
\$2000 - \$2499	676	3.3%
\$2500 - \$2999	171	0.8%
\$3000+	70	0.3%
With No Mortgage	5,225	25.5%
Median Monthly Owner Costs for Units with Mortgage	\$1,140	
Average Monthly Owner Costs for Units with Mortgage	\$1,204	

### Census 2000 Specified Renter Occupied Housing Units by Contract Rent

	Number	Percent
Total	13,522	100.0%
Paying Cash Rent	13,174	97.4%
< \$100	103	0.8%
\$100 - \$149	236	1.7%
\$150 - \$199	224	1.7%
\$200 - \$249	104	0.8%
\$250 - \$299	162	1.2%
\$300 - \$349	352	2.6%
\$350 - \$399	486	3.6%
\$400 - \$449	871	6.4%
\$450 - \$499	1,231	9.1%
\$500 - \$549	1,977	14.6%
\$550 - \$599	1,706	12.6%
\$600 - \$649	1,117	8.3%
\$650 - \$699	1,007	7.4%
\$700 - \$749	741	5.5%
\$750 - \$799	642	4.7%
\$800 - \$899	803	5.9%
\$900 - \$999	510	3.8%
\$1000 - \$1249	580	4.3%
\$1250 - \$1499	240	1.8%
\$1500 - \$1999	62	0.5%
\$2000 +	20	0.1%
No Cash Rent	348	2.6%
Median Rent	\$575	
Average Rent	\$608	
Average Gross Rent (with Utilities)	\$689	

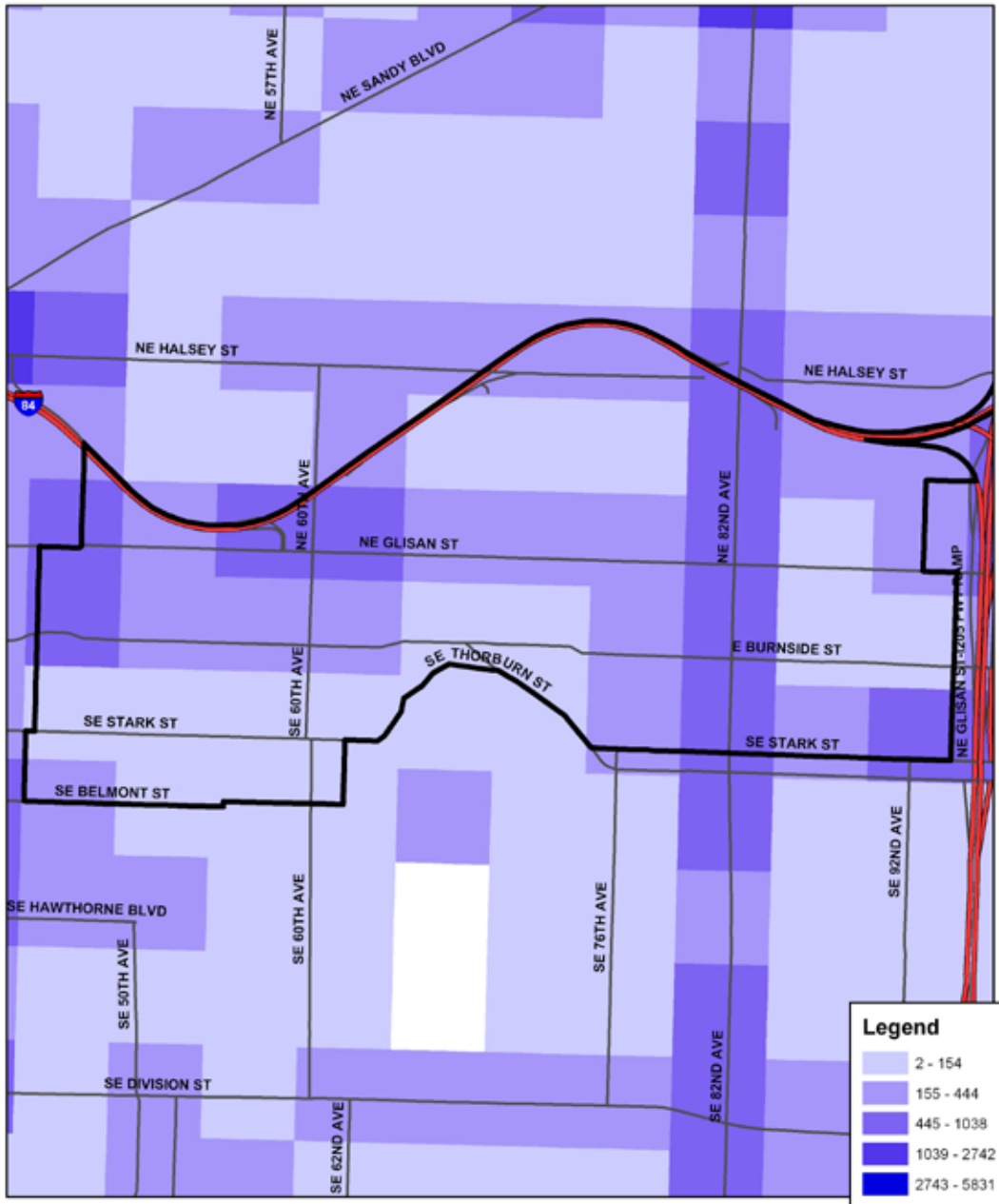
**Data Note:** Specified Owner Occupied Housing Units exclude houses on 10+ acres, mobile homes, units in multiunit buildings, and houses with a business or medical office. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Contract Rent and Average Gross Rent exclude units paying no cash rent.

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

# Appendix D:

## GLISAN ST. CALLS FOR SERVICE

Portland Police Bureau  
2005 Calls for Service Density: Glisan Street (57th to 82nd Avenue)



Portland Police Bureau  
Data Source: SQL Program 1/03/07  
Glisan Street area consists of census tracts 17.01, 17.02, 18.01, and 18.02.  
Overlay grid consists of quarter mile squares

# Appendix E:

## CRIME AND CALLS DATA FROM PORTLAND POLICE DEPT.

**Portland Police Bureau  
Glisan Street Part I Crime and Calls for Service Data: 2000-2005**

<b>Part I Crimes</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>% Change 2000-2005</b>
<b>Crimes Against Persons</b>							
Murder	0	1	0	0	0	0	---
Rape	5	11	6	6	7	6	20%
Robbery	25	29	26	33	26	27	8%
Aggravated Assault	98	56	72	68	48	56	-43%
<b>Total Person Crimes</b>	<b>128</b>	<b>97</b>	<b>104</b>	<b>107</b>	<b>81</b>	<b>89</b>	<b>-30%</b>
<b>Crimes Against Property</b>							
Burglary	142	157	162	219	254	187	32%
Larceny	635	840	776	991	785	632	<1%
Motor Vehicle Theft	155	186	191	197	224	258	66%
Arson	9	12	9	21	6	7	-22%
<b>Total Property Crimes</b>	<b>941</b>	<b>1,195</b>	<b>1,138</b>	<b>1,428</b>	<b>1,269</b>	<b>1,084</b>	<b>15%</b>
<b>Total Part I-Crimes</b>	<b>1,069</b>	<b>1,292</b>	<b>1,242</b>	<b>1,535</b>	<b>1,350</b>	<b>1,173</b>	<b>10%</b>

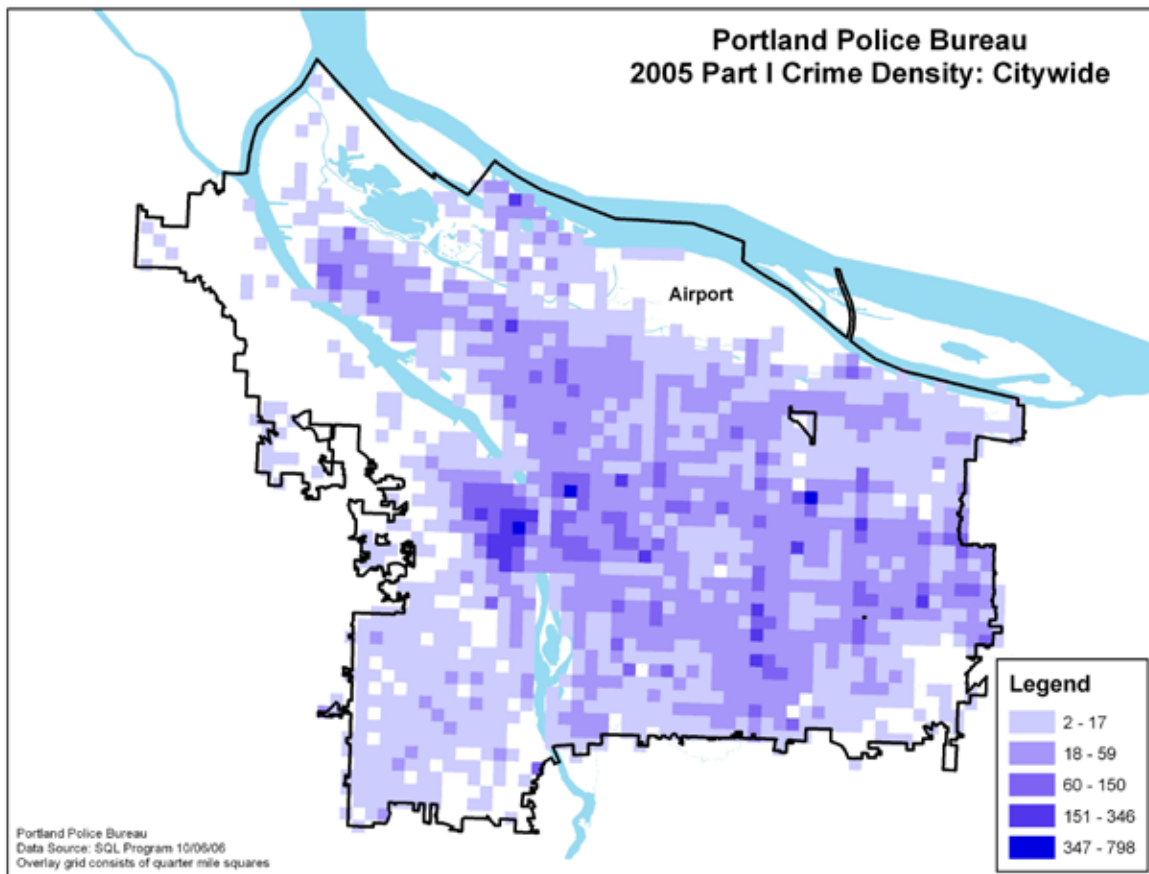
<b>Calls for Service</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>% Change 2000-2005</b>
Dispatched	6,018	6,628	6,259	6,886	7,107	6,831	14%
Self-initiated	3,099	2,669	3,665	3,993	4,084	3,892	26%
<b>Total Calls for Service</b>	<b>9,117</b>	<b>9,297</b>	<b>9,924</b>	<b>10,879</b>	<b>11,191</b>	<b>10,723</b>	<b>18%</b>

\* Glisan Street area totals calculated using census tracts 17.01,17.02,18.01, and 18.02.

Data Source: SQL Program 1/03/07

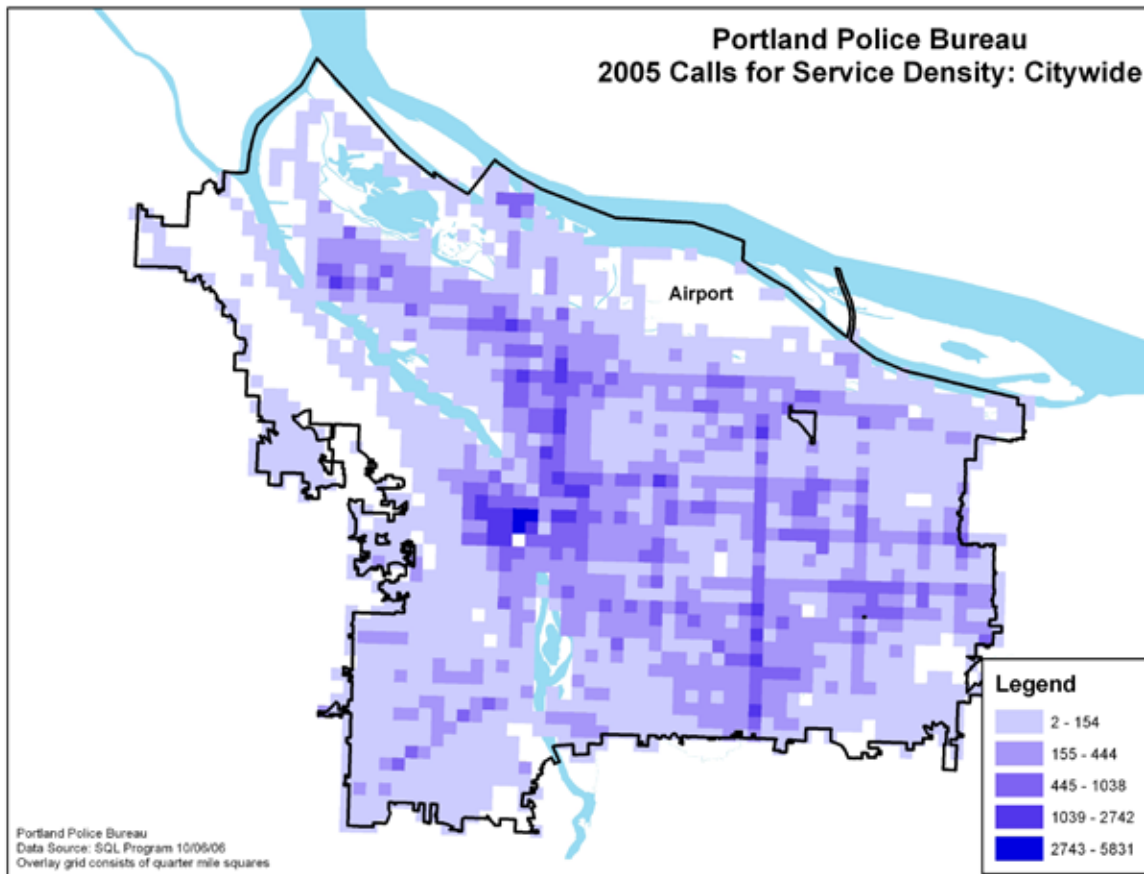
# Appendix F:

## CITYWIDE CRIME MAP



# Appendix G:

## CITYWIDE CALLS FOR SERVICE MAP



# Appendix G:

## DETAILED MARKET ANALYSIS DATA



### Retail MarketPlace Profile

**NE 69th Ave AT NE Glisan St  
Portland, OR 97213**

**Latitude: 45.5264  
Longitude: -122.5924  
Radius: 1.0 miles**

**Summary Demographics**

2006 Population	22,579
2006 Households	9,433
2006 Median Disposable Income	\$37,284
2006 Per Capita Income	\$26,600

**Industry Summary**

	Supply (Retail Sales)	Demand (Retail Potential)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$157,756,454	\$232,663,624	\$74,907,170	19.2	163
Total Retail Trade (NAICS 44-45)	\$115,209,408	\$200,659,963	\$85,450,555	27.1	119
Total Food & Drink (NAICS 722)	\$42,547,046	\$32,003,661	-\$10,543,385	-14.1	44

Industry Group	Supply (Retail Sales)	Demand (Retail Potential)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$26,844,995	\$52,781,660	\$25,936,665	32.6	22
Automobile Dealers (NAICS 4411)	\$17,762,544	\$44,358,088	\$26,595,544	42.8	11
Other Motor Vehicle Dealers (NAICS 4412)	\$6,283,300	\$4,210,005	-\$2,073,295	-19.8	3
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$2,799,151	\$4,213,567	\$1,414,416	20.2	8
Furniture & Home Furnishings Stores (NAICS 442)	\$2,704,976	\$7,160,209	\$4,455,233	45.2	6
Furniture Stores (NAICS 4421)	\$259,632	\$3,917,284	\$3,657,652	87.6	2
Home Furnishings Stores (NAICS 4422)	\$2,445,344	\$3,242,925	\$797,581	14.0	4
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$4,052,606	\$6,500,099	\$2,447,493	23.2	9
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$3,233,682	\$6,587,295	\$3,353,613	34.1	9
Building Material and Supplies Dealers (NAICS 4441)	\$2,492,103	\$6,169,898	\$3,677,795	42.5	6
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$741,579	\$417,397	-\$324,182	-28.0	3
Food & Beverage Stores (NAICS 445)	\$39,370,015	\$43,666,588	\$4,296,573	5.2	19
Grocery Stores (NAICS 4451)	\$38,930,304	\$40,169,341	\$1,239,037	1.6	16
Specialty Food Stores (NAICS 4452)	\$439,711	\$1,844,000	\$1,404,289	61.5	3
Beer, Wine, and Liquor Stores (NAICS 4453)	\$0	\$1,653,247	\$1,653,247	100.0	0
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$10,451,842	\$6,913,320	-\$3,538,522	-20.4	7
Gasoline Stations (NAICS 447/NAICS 4471)	\$17,444,889	\$19,155,234	\$1,710,345	4.7	6
Clothing and Clothing Accessories Stores (NAICS 448)	\$2,576,343	\$13,173,885	\$10,597,542	67.3	5
Clothing Stores (NAICS 4481)	\$2,563,237	\$10,588,912	\$8,025,675	61.0	5
Shoe Stores (NAICS 4482)	\$0	\$1,763,395	\$1,763,395	100.0	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$13,106	\$821,578	\$808,472	96.9	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$2,766,040	\$4,032,557	\$1,266,517	18.6	11
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$1,209,669	\$2,148,854	\$939,185	28.0	5
Book, Periodical, and Music Stores (NAICS 4512)	\$1,556,371	\$1,883,703	\$327,332	9.5	6

**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®.

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6/27/2007



## Retail MarketPlace Profile

NE 69th Ave AT NE Glisan St  
 Portland, OR 97213

Latitude: 45.5264  
 Longitude: -122.5924  
 Radius: 1.0 miles

Industry Group	Supply (Retail Sales)	Demand (Retail Potential)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	\$527,102	\$30,802,861	\$30,275,759	96.6	1
Department Stores Excluding Leased Depts. (NAICS 4521)	\$527,102	\$19,533,757	\$19,006,655	94.7	1
Other General Merchandise Stores (NAICS 4529)	\$0	\$11,269,104	\$11,269,104	100.0	0
Miscellaneous Store Retailers (NAICS 453)	\$3,405,041	\$3,787,525	\$382,484	5.3	23
Florists (NAICS 4531)	\$489,035	\$286,453	\$-202,582	-26.1	5
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$172,294	\$1,376,336	\$1,204,042	77.7	4
Used Merchandise Stores (NAICS 4533)	\$474,593	\$276,554	\$-198,039	-26.4	5
Other Miscellaneous Store Retailers (NAICS 4539)	\$2,269,119	\$1,848,182	\$-420,937	-10.2	9
Nonstore Retailers (NAICS 454)	\$1,831,877	\$6,098,730	\$4,266,853	53.8	1
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$0	\$2,219,781	\$2,219,781	100.0	0
Vending Machine Operators (NAICS 4542)	\$0	\$1,569,638	\$1,569,638	100.0	0
Direct Selling Establishments (NAICS 4543)	\$1,831,877	\$2,309,311	\$477,434	11.5	1
Food Services & Drinking Places (NAICS 722)	\$42,547,046	\$32,003,661	\$-10,543,385	-14.1	44
Full-Service Restaurants (NAICS 7221)	\$32,244,797	\$10,061,551	\$-22,183,246	-52.4	3
Limited-Service Eating Places (NAICS 7222)	\$8,227,709	\$14,937,637	\$6,709,928	29.0	36
Special Food Services (NAICS 7223)	\$92,286	\$4,001,300	\$3,909,014	95.5	1
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$1,982,254	\$3,003,173	\$1,020,919	20.5	4



## Retail MarketPlace Profile

NE 69th Ave AT NE Glisan St  
Portland, OR 97213

Site Type: Radius

Latitude: 45.5264  
Longitude: -122.5924  
Radius: 2.0 miles

### Summary Demographics

2006 Population	86,150
2006 Households	35,900
2006 Median Disposable Income	\$39,972
2006 Per Capita Income	\$28,702

Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$901,206,488	\$952,907,573	\$51,701,085	2.8	863
Total Retail Trade (NAICS 44-45)	\$727,287,582	\$821,888,051	\$94,600,469	6.1	589
Total Food & Drink (NAICS 722)	\$173,918,906	\$131,019,522	\$-42,899,384	-14.1	274

Industry Group	Supply (Retail Sales)	Demand (Retail Potential)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$170,620,025	\$216,615,902	\$45,995,877	11.9	79
Automobile Dealers (NAICS 4411)	\$116,095,000	\$181,818,125	\$65,723,125	22.1	41
Other Motor Vehicle Dealers (NAICS 4412)	\$38,335,668	\$17,626,738	\$-20,708,930	-37.0	12
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$16,189,357	\$17,171,039	\$981,682	2.9	26
Furniture & Home Furnishings Stores (NAICS 442)	\$19,797,464	\$29,900,186	\$10,102,722	20.3	37
Furniture Stores (NAICS 4421)	\$11,952,123	\$16,323,500	\$4,371,377	15.5	17
Home Furnishings Stores (NAICS 4422)	\$7,845,341	\$13,576,686	\$5,731,345	26.8	20
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$24,650,917	\$26,574,361	\$1,923,444	3.8	38
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$15,748,128	\$27,977,158	\$12,229,030	28.0	35
Building Material and Supplies Dealers (NAICS 4441)	\$13,819,521	\$26,204,678	\$12,385,157	30.9	26
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$1,928,607	\$1,772,480	\$-156,127	-4.2	9
Food & Beverage Stores (NAICS 445)	\$161,658,773	\$177,469,554	\$15,810,781	4.7	86
Grocery Stores (NAICS 4451)	\$144,957,586	\$163,269,793	\$18,312,207	5.9	57
Specialty Food Stores (NAICS 4452)	\$3,790,086	\$7,483,533	\$3,693,447	32.8	19
Beer, Wine, and Liquor Stores (NAICS 4453)	\$12,911,101	\$6,716,228	\$-6,194,873	-31.6	10
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$47,650,209	\$28,350,167	\$-19,300,042	-25.4	41
Gasoline Stations (NAICS 447/NAICS 4471)	\$56,546,829	\$77,909,497	\$21,362,668	15.9	23
Clothing and Clothing Accessories Stores (NAICS 448)	\$26,889,531	\$53,983,245	\$27,093,714	33.5	57
Clothing Stores (NAICS 4481)	\$18,716,046	\$43,410,745	\$24,694,699	39.7	40
Shoe Stores (NAICS 4482)	\$3,628,668	\$7,152,419	\$3,523,751	32.7	4
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$4,544,817	\$3,420,081	\$-1,124,736	-14.1	13
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$27,141,164	\$16,302,644	\$-10,838,520	-24.9	60
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$18,124,188	\$8,779,501	\$-9,344,687	-34.7	37
Book, Periodical, and Music Stores (NAICS 4512)	\$9,016,976	\$7,523,143	\$-1,493,833	-9.0	23

**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 curr

Source: ESRI and info USA®.





## Retail MarketPlace Profile

NE 69th Ave AT NE Glisan St Portland, OR 97213		Latitude: 45.5264	Longitude: -122.5924	Radius: 2.0 miles			
Industry Group	Site Type:	Radius	Supply (Retail Sales)	Demand (Retail Potential)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)			\$115,178,671	\$126,093,025	\$10,914,354	4.5	11
Department Stores Excluding Leased Depts. (NAICS 4521)			\$62,719,207	\$80,166,838	\$17,447,631	12.2	9
Other General Merchandise Stores (NAICS 4529)			\$52,459,464	\$45,926,187	\$-6,533,277	-6.6	2
Miscellaneous Store Retailers (NAICS 453)			\$23,003,803	\$15,558,115	\$-7,445,688	-19.3	115
Florists (NAICS 4531)			\$1,247,775	\$1,219,981	\$-27,794	-1.1	17
Office Supplies, Stationery, and Gift Stores (NAICS 4532)			\$8,267,115	\$5,661,765	\$-2,605,350	-18.7	29
Used Merchandise Stores (NAICS 4533)			\$4,899,814	\$1,132,972	\$-3,766,842	-62.4	29
Other Miscellaneous Store Retailers (NAICS 4539)			\$8,589,099	\$7,543,397	\$-1,045,702	-6.5	40
Nonstore Retailers (NAICS 454)			\$38,402,068	\$25,154,197	\$-13,247,871	-20.8	7
Electronic Shopping and Mail-Order Houses (NAICS 4541)			\$34,456,261	\$9,073,722	\$-25,382,539	-58.3	2
Vending Machine Operators (NAICS 4542)			\$715,042	\$6,398,064	\$5,683,022	79.9	2
Direct Selling Establishments (NAICS 4543)			\$3,230,765	\$9,682,411	\$6,451,646	50.0	3
Food Services & Drinking Places (NAICS 722)			\$173,918,906	\$131,019,522	\$-42,899,384	-14.1	274
Full-Service Restaurants (NAICS 7221)			\$76,363,642	\$41,120,767	\$-35,242,875	-30.0	9
Limited-Service Eating Places (NAICS 7222)			\$67,396,774	\$61,089,693	\$-6,307,081	-4.9	225
Special Food Services (NAICS 7223)			\$11,959,463	\$16,362,993	\$4,403,530	15.5	5
Drinking Places - Alcoholic Beverages (NAICS 7224)			\$18,199,027	\$12,446,069	\$-5,752,958	-18.8	35

