

# 82<sup>nd</sup> Avenue Commercial Corridor RETAIL MARKET ANALYSIS



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# Acknowledgments

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# Study Overview

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 the 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 of these streets function as commercial districts or corridors, providing a marketplace of goods and services that serve users ranging from the local neighborhoods to the regional populations.



A mix of commercial buildings, as well as houses once formerly used as residential that now serve as commercial space, are interspersed along the Corridor. A variety of personal service and office uses occupy these non-traditional storefronts.

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

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.



Powell Street Station includes a coffee shop, shoe store, restaurant, sign company and salon.



# 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 and customer intercept surveys and an “on-the-ground” inventory of existing buildings and storefronts on the 82nd Avenue Corridor (the “Corridor”) to provide qualitative information. A copy of the surveys and findings are included in Appendix B and C. The data and findings from this study will provide an understanding of the local market area that should inform subsequent planning initiatives, while potentially serving as the economic underpinning for future planning considerations and decisions.

In conducting this study, specific trade areas were defined. The Corridor’s neighborhood (1-mile) and community (3-mile) trade areas, drawn as concentric circles originating from its center point at the intersection of SE 82nd Avenue and Mill Street, 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 3-mile area given the predominance of small businesses and neighborhood retailers along the Corridor. The sales gap analysis will identify gaps in the existing business mix for the neighborhood and community trade areas and identify industries where there is a surplus of goods and services.



Auto parts and repair services are abundant along the Corridor.

# Existing Conditions

## Overview of the 82nd Avenue Corridor

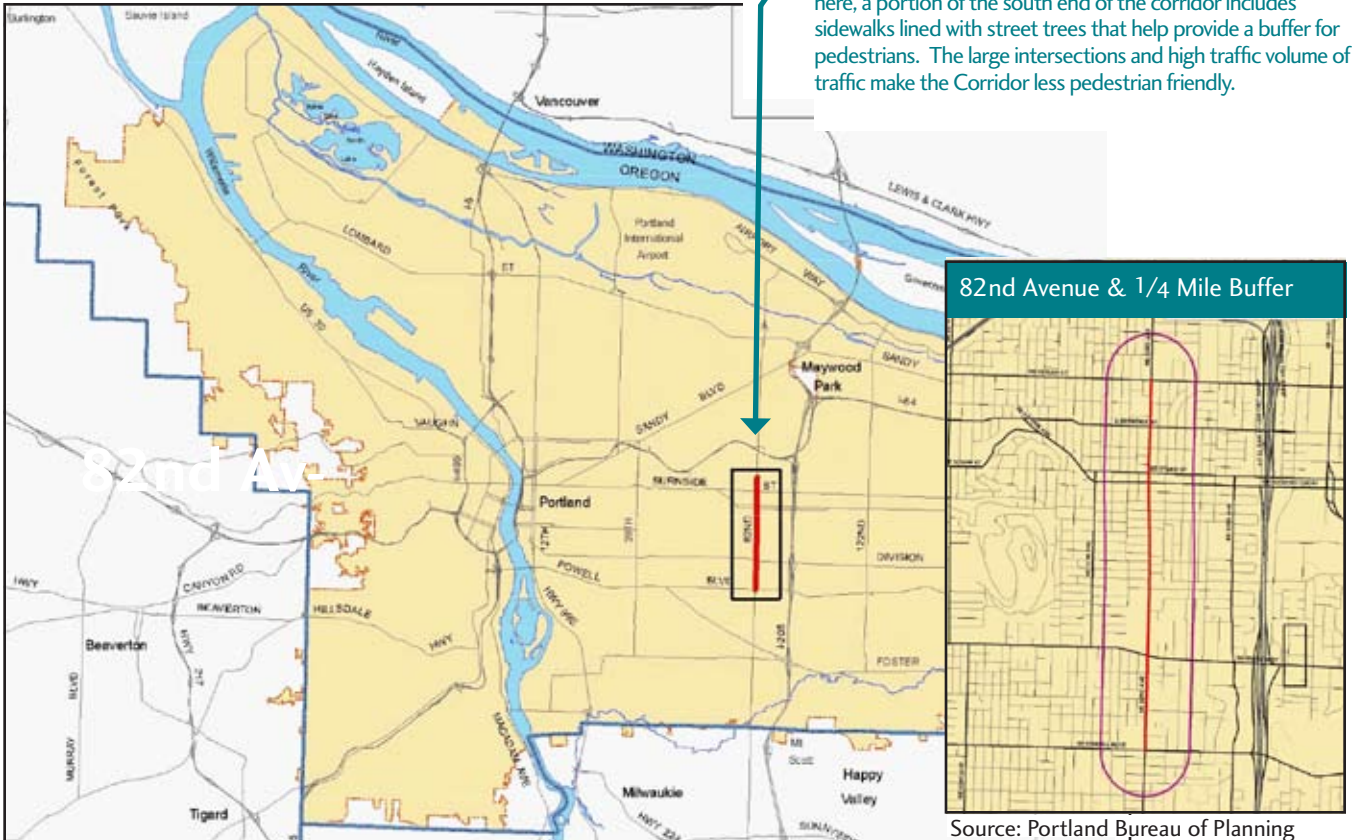
### TRANSPORTATION

The 82nd Avenue Corridor is located 6.0 miles southeast of downtown Portland. The Corridor, shown in Figure 1, extends roughly two miles along 82nd Avenue, from Glisan Street to Powell Boulevard. It is contained within four Portland neighborhoods, Montavilla, South Tabor, Foster-Powell, and Powellhurst-Gilbert, and is served by the 82nd Avenue of Roses Business District Association (BDA).



The 82nd Avenue Corridor, a designated state highway, consists of four lanes with a center turn lane. As shown here, a portion of the south end of the corridor includes sidewalks lined with street trees that help provide a buffer for pedestrians. The large intersections and high traffic volume of traffic make the Corridor less pedestrian friendly.

Figure 1: 82nd Avenue Locator Map



Source: Portland Bureau of Planning



Eighty-Second Avenue is a State Highway that connects with Interstate 84 (I-84) to the north and Clackamas County to the south. It is a four-lane arterial with a single-lane divider. The Corridor is well served by public transit, including six bus lines (see Table 1 at right) and the MAX Blue and Red Lines, accessible at the 82nd Avenue MAX Station near I-84. The most distinguishing feature of the Corridor is its mix of multi-cultural businesses and services, as well as the agglomeration of used car dealerships and auto repair services.

## LAND USE

Most of the Corridor is zoned General Commercial, which supports an automobile-oriented, low density environment. However, a small section of the Corridor that extends north from the intersection of 82nd Avenue and Division Avenue to SE Harrison Street is zoned Storefront Commercial.

The majority of Corridor businesses are small, independent retailers or franchises, although several larger retail businesses and institutional facilities are located there. The Corridor competes with major shopping centers in Portland and outlying areas as well as intersecting commercial corridors on Glisan Street, Division Street, Stark Street, and Powell Boulevard. Many of the commercial and retail services offered by Corridor businesses can be found in other corridors, but as mentioned above, 82nd Avenue is positioned to serve a regional market with its ethnic goods and services and used car sales market niches.

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

Line 72 – 82nd Avenue
Line 9 – Powell Boulevard
Line 4 – Division Street
Line 20 – Burnside Street
Line 15 – Washington/Stark Streets
Line 19 – Glisan Street



This strip mall, anchored by discount grocer Food4Less and Hollywood Video, is located at the south end of the Corridor study area at the intersection of Powell Boulevard.



Built in 1929, Vestal Elementary School serves kindergarten through sixth grade, and is transitioning to include seventh and eighth grade.

## RECENT DEVELOPMENT

Over the past three years, the Corridor has witnessed an increase in development activity. Examples of new commercial development oriented towards the growing Asian and Eastern European populations in nearby neighborhoods include the Fubonn Shopping Center and the Universal Center. Located two blocks south of Division Street, the Fubonn Shopping Center specializes in goods and services oriented to Asian consumers. It is anchored by the Fubonn Supermarket and Deli, a full-service Asian grocer. The shopping center also houses 25 smaller retail shops and professional offices including, but not limited to, clothing, accessories and gift stores, music, video and electronics stores, three restaurants, an Asian bakery and a Starbucks as well as a dentist office and mortgage brokerage.



The Fubonn Shopping Center, the largest Asian market in the state, recently opened as an anchor to the Corridor between Division Street and Powell Boulevard. The Center serves the Corridor's growing Asian retail market niche with a specialty supermarket, several restaurants, clothiers and other services.



The Universal Center recently opened with 14 retail storefronts including Vietnamese and Thai restaurants, a European market and Ukrainian Credit Union.

The Universal Center, a shopping center located at the intersection of Harrison Street and 82nd Avenue, provides a mix of goods and services that cater to Eastern European and Asian consumers. Recently, the Ukrainian Federal Credit Union opened a branch in the Universal Center, which is within walking distance of the Eastgate Church, a 1000-member church with a largely Ukrainian congregation. In addition to new commercial development, Portland Community College's Southeast Center, a 94,000 square-foot facility located at the corner of Division and 82nd Avenue, is a boon to the area. The Southeast Center opened to students in 2004 and houses several programs, including Gateway to College, an alternative high school program, English as a Second Language (ESL), and a variety of non-credit courses offered through the Community Education program. To acquire development approval for the facility, PCC was required by the City to provide improved sidewalks and new tree plantings, which has contributed to the enhancement of this important node along the corridor.

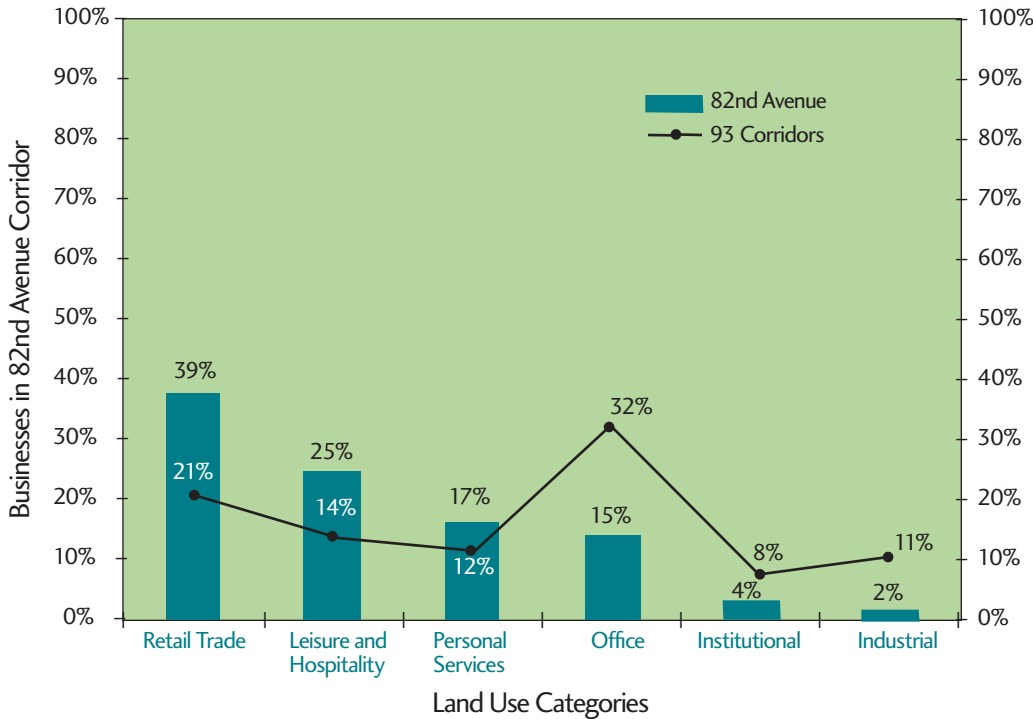
# Mix of Businesses and Land Uses

The composition of businesses along a commercial corridor significantly influences its identity, attractiveness, and ability to capture sales. This section of the report provides a detailed inventory of businesses and land uses on the 82nd Avenue 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.

## 82ND AVENUE IN RELATION TO OTHER CORRIDORS

Figures 2 and 3 below show the percentage of businesses and employees by land use category within the 82nd Avenue Corridor in comparison to the 93 commercial corridors citywide identified in Phase I of this study. The Corridor is comprised of 200 businesses employing an estimated 1,170 persons compared to 6,897 businesses in all 93 corridors employing an estimated 65,531 persons. Since a comprehensive on-the-ground land use and business inventory was conducted along the 82nd 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

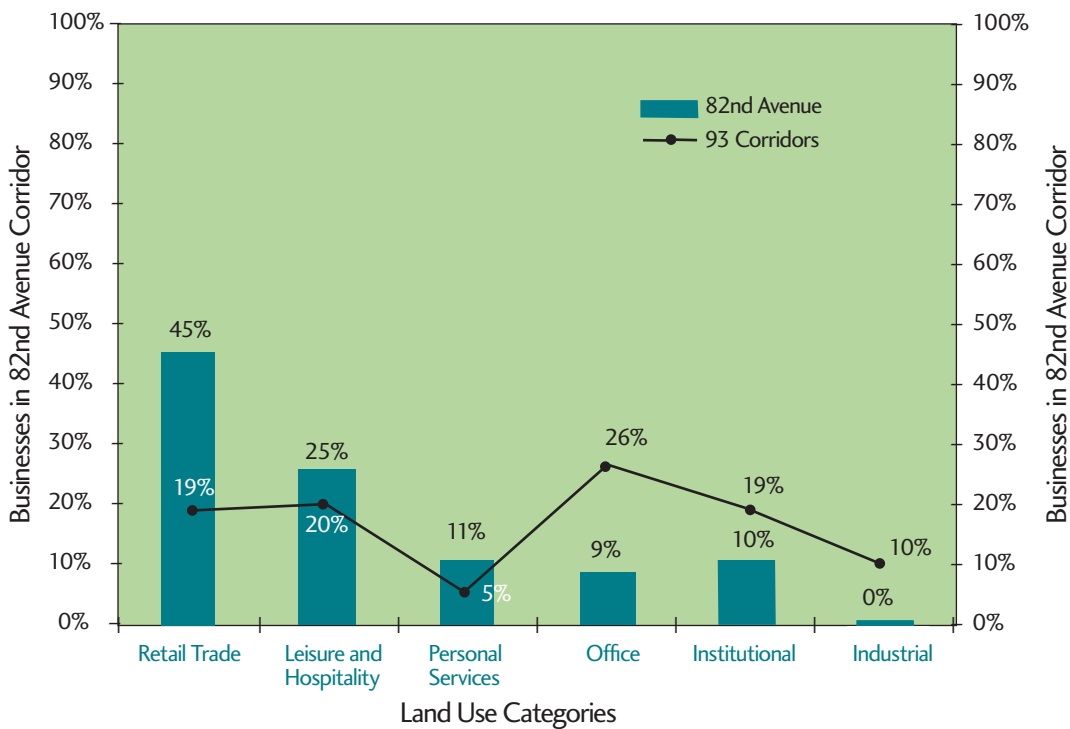


InfoUSA, 2004 data for 93 Corridors. Bureau of Planning Land Use Inventory for 82nd Avenue Corridor.

**Findings:**

- Compared to other commercial corridors, 82nd Avenue is a strong retail and restaurant district. The percentage of Corridor businesses within the Retail Trade, Leisure and Hospitality and Personal Services land use categories exceeds that of the 93 corridors citywide by 17 percent, 10 percent and 5 percent respectively.
- The Corridor has significantly fewer Office uses – 15 percent compared to 32 percent for all corridors citywide.
- Relative to the 93 corridors, there are fewer Institutional and Industrial uses along the 82nd Avenue Corridor.

**Figure 3: Percentage of Employees by Land Use Category**



InfoUSA, 2004 data for 93 Corridors. Bureau of Planning Land Use Inventory for 82nd Avenue Corridor.

**Findings:**

- The percentage of Retail Trade employees in the Corridor is more than 25 percent higher than all 93 corridors. The Corridor also has a higher percentage of Leisure and Hospitality and Personal Services employees.
- Corresponding with the limited number of Office, Institutional and Industrial uses along the Corridor, the percentage of persons employed in these land use categories is significantly lower than the 93 corridors.

See Appendix E for a more a more detailed summary of business and employment figures identified in Figures 2 and 3.



## 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 spring 2006, the Bureau of Planning conducted a land use inventory along the 82nd Avenue Corridor. The inventory identified employment uses and non-employment uses such as community facilities, open space, vacant land and space for lease. The Corridor is comprised of 200 businesses and 260 tax lots, which may include multiple uses within a building or strip mall as well as parking lots.

The land use maps in Figure 4 illustrate 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.



The north end of the Corridor study area is intersected by Glisan Street, which includes several different major retail uses such as Washman Car Wash, Burgerville and Chevron. The Montavilla Community Center also borders the Corridor at this intersection with a recreation center and outdoor pool.



Located on the northeast corner of 82nd Avenue and Glisan Street, adjacent to the Montavilla Community Center, Harrison Park is the only designated open space within the study area. The park is 4.6 acres.





Figure 4a:  
Land Use - North Section

- Retail Trade
- Personal Services
- Leisure & Hospitality
- Office
- Institutional
- Residential
- Industrial
- Open Space
- Vacant Building
- Vacant Land
- Anchor Property
- Multi-Use Property



north



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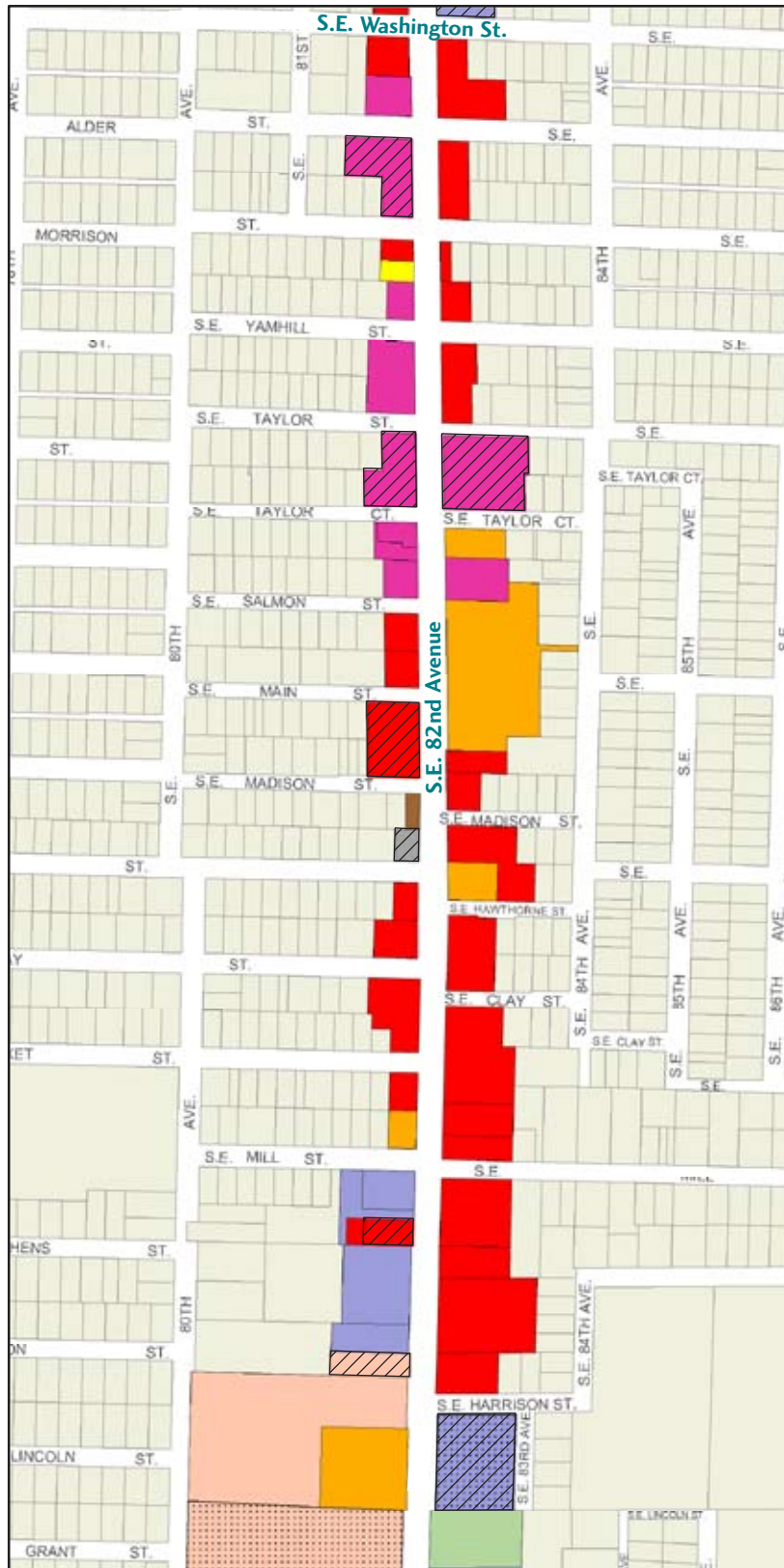


Figure 4b:  
Land Use - Middle Section

- Retail Trade
- Personal Services
- Leisure & Hospitality
- Office
- Institutional
- Residential
- Industrial
- Open Space
- Vacant Building
- Vacant Land
- Anchor Property
- Multi-Use Property



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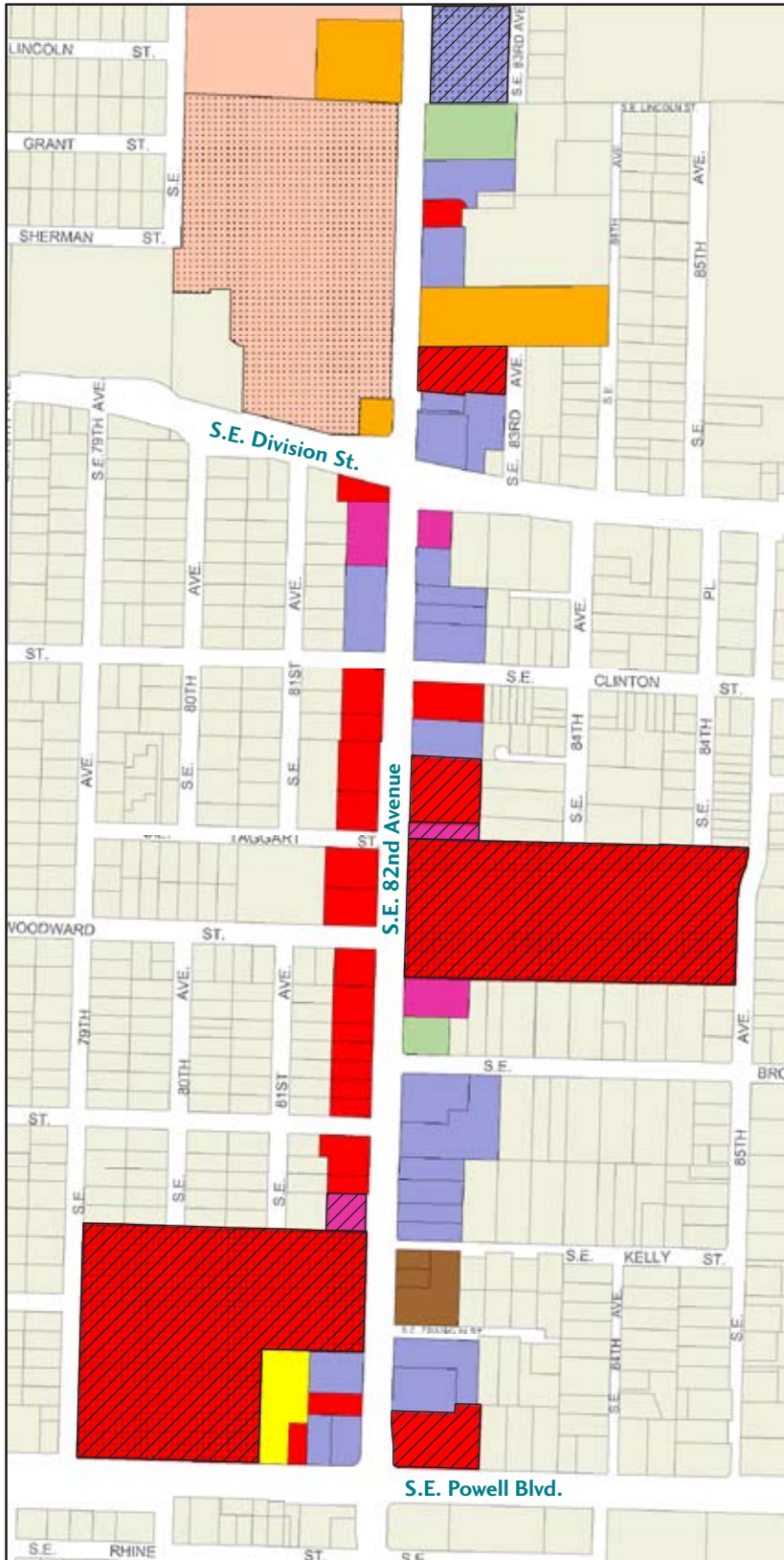














Figure 4c:  
Land Use - South Section

-  Retail Trade
-  Personal Services
-  Leisure & Hospitality
-  Office
-  Institutional
-  Residential
-  Industrial
-  Open Space
-  Vacant Building
-  Vacant Land
-  Anchor Property
-  Multi-Use Property



north



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Table 2 provides a summary of Corridor land uses. 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		103	40%	423,704	41%
Motor Vehicle Dealers	4411-2	45	17%	82,258	8%
Food and Beverage Stores	445	10	4%	47,000	5%
All Other Retail Trade	*	48	18%	294,446	28%
Leisure and Hospitality		62	24%	133,103	13%
Restaurants and Bars	722	58	22%	84,613	8%
Lodging	721	3	1%	47,500	5%
Arts, Entertainment and Recreation	711-3	1	0%	990	0%
Personal Services		40	15%	95,535	9%
Automotive Repair and Maintenance	8111	22	8%	84,060	8%
Personal Care and Laundry Facilities		18	7%	11,475	1%
Other Repair and Maintenance	8113-4	0	0%	0	0%
Office		29	11%	105,423	10%
Medical and Dental Offices	622-3	7	3%	5,310	1%
Professional and Business Services	541, 551, 561	5	2%	3,950	0%
Financial Activities	521-5, 531-3	17	7%	96,163	9%
Information	511-519	0	0%	0	0%
Government	921-928	0	0%	0	0%
Institutional		7	3%	238,679	23%
Religious, Community and Social Service Institutions	813, 624	4	2%	58,079	6%
Schools and Colleges	611	3	1%	180,600	17%
Medical Centers and Residential Care Facilities	622-3	0	0%	0	0%
Industrial <sup>1</sup>	**	3	1%	1,800	0%
<b>Total Employment Uses</b>		<b>244</b>	<b>94%</b>	<b>998,244</b>	<b>96%</b>
<b>NON-EMPLOYMENT USES</b>					
Open Space		1	0%	16,945	2%
Residential		3	1%	9,914	1%
Vacant Building or Storefront		8	3%	19,300	2%
Vacant Land		4	2%	0	0%
<b>Total Non-Employment Uses</b>		<b>16</b>	<b>6%</b>	<b>46,159</b>	<b>4%</b>
<b>Total Uses</b>		<b>260</b>	<b>100%</b>	<b>1,044,403</b>	<b>100%</b>

<sup>1</sup>Includes the following NAICS Industry Sectors: Utilities, Construction, Manufacturing, Wholesale Trade, Transportation and Warehousing, Waste Management and Remediation, Agriculture and Mining.

\* 442-4, 446-8, 451-4

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



**Findings:**

- Of the 260 tax lots along the Corridor, employment uses constitute 94 percent whereas non-employment uses constitute just 6 percent.
- The Retail Trade and Leisure and Hospitality land use categories comprise more than two-thirds of total employment uses and occupy 54 percent of total building square footage along the Corridor. (It is important to note that the square footage for motor vehicle dealers doesn't include the land used to park cars for sale and may underestimate true retail space related to this particular corridor.)
- Although Institutional uses account for just 3 percent of total employment tax lots, this land use category constitutes nearly a quarter of total building square footage.
- Potential for redevelopment exists based on eight building and storefront vacancies in addition to four tax lots of vacant, developable land.

**INDUSTRY MIX**

Table 3 below shows the distribution of Corridor businesses by National American Industry Classification System (NAICS) industry sector. NAICS is a standardized system used in the United States and Canada to classify different industries. Table 3 provides an overview of the industry makeup of the Corridor at the broadest level using two-digit NAICS codes. Tables 4 to 6 provide more detail for three of the main industry sectors (Retail Trade, Accommodation and Food Services and Other Services) along the Corridor using three- and five-digit NAICS codes. Similar to the land use survey, the business composition reveals that most Corridor businesses specialize in retail goods and services. However, educational institutions such as Portland Community College and Vestal Elementary School are also a major presence and among the Corridor's largest employers.

**Table 3: Business Composition by Industry**

NAICS Industry Sector	NAICS Codes	Number of Businesses	Percent of Total Uses
Construction	23	1	0.5%
Wholesale Trade	42	1	0.5%
Retail Trade	44-45	76	38.0%
Arts Entertainment and Recreation	71	1	0.5%
Accommodation and Food Services	72	50	25.0%
Finance and Insurance	52	10	5.0%
Real Estate Rental and Leasing	53	7	3.5%
Professional, Scientific and Technical Services	54	2	1.0%
Administrative/Support Services	56	4	2.0%
Educational Services	61	3	1.5%
Health Care and Social Assistance	62	7	3.5%
Other Services	81	38	19.0%
<b>Total Businesses</b>	-	<b>200</b>	<b>100.0%</b>

Source: Portland Bureau of Planning 2006 Business Owner Survey



Table 4: Retail Trade Businesses by 3-Digit NAICS

3-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Building Material and Garden Equipment and Supplies Dealers	444	1	1%
Clothing and Clothing Accessories Stores	448	6	8%
Electronics & Appliance Stores	443	3	4%
Food and Beverage Stores	445	9	12%
Furniture and Home Furnishings Stores	442	1	1%
Gasoline Stations	447	2	3%
Health and Personal Care Stores	446	3	4%
Miscellaneous Store Retailers	453	13	17%
Motor Vehicle and Parts Dealers	441	35	46%
Sporting Goods, Hobby, Book and Music Stores	451	3	4%
<b>Total</b>		<b>76</b>	<b>100%</b>

Source: Portland Bureau of Planning 2006 Business Owner Survey

### Findings:

- Motor Vehicle and Parts Dealers are, by far, the predominant retail use on the Corridor, accounting for 46 percent of all Retail Trade businesses. Car dealerships represent the majority of businesses in this industry subsector. Of the 29 dealerships in the Corridor, 28 specialize in used car sales. This critical mass of used car dealers offers prospective buyers significant opportunities to cross-shop and has made 82nd Avenue a regional destination for used car sales.
- In addition to car dealerships, the Corridor features a broad mix of Food and Beverage stores, including larger discount grocers such as Food4Less and ethnic grocers such as Oriental Market, Thong XA Fubonn Super Market and Ril's European Market.



Retail Trade businesses, such as auto dealers and grocery stores, and Accommodation and Food Services businesses, including restaurants and hotels, are predominant uses along the Corridor.

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

NAICS 5-Digit Industry Sub Sector	NAICS Code	Number	Percent
Drinking Places (Alcoholic Beverages)	72241	2	4%
Full Service Restaurants	72211	24	48%
Hotels and Motels	72111	3	6%
Limited Service Eating Places	72221	21	42%
Total		50	100%

Source: Portland Bureau of Planning 2006 Business Owner Survey

### Findings:

- Accommodation and Food Services businesses, which include hotels and motels, bars, restaurants and other eating establishments, account for 25 percent of the Corridor's total businesses.
- Full Service Restaurants and Limited Service Eating Places (i.e. fast food) together comprise 88 percent of the Corridor's Accommodation and Food Service employers (44 businesses). The Corridor features 19 Asian restaurants, seven coffee shops and 10 fast food restaurant chains such as Papa Murphy's, Subway and Wendy's.
- In contrast to the large number of restaurants along the Corridor, there are only three bars.



82nd Avenue has become known for quality Asian restaurants.

Table 6: Other Services Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Automotive Body, Paint, Interior and Glass Repair	81112	7	18%
Automotive Mechanical & Electrical Repair and Maintenance	81111	6	16%
Hair, Nail and Skin Care Services	81211	14	37%
Coin-Operated Laundries and Dry Cleaners	81231	2	5%
Other Automotive Repair & Maintenance	81119	3	8%
Other Personal Care Services	81219	2	5%
Religious Organizations	81311	3	8%
Social Advocacy Organizations	81331	1	3%
Total		38	100%

Source: Portland Bureau of Planning 2006 Business Owner Survey

### Findings:

- The Corridor features 14 Hair, Nail and Skin Care Services businesses, which constitute 37 percent of businesses in the Other Services Industry Sector.
- In addition to Hair, Nail and Skin Care Services, businesses that provide a broad range of automotive repair and maintenance services are also well represented. These automobile-oriented businesses, which fall into three industry sub sectors, account for a combined 38 percent of Other Services businesses.



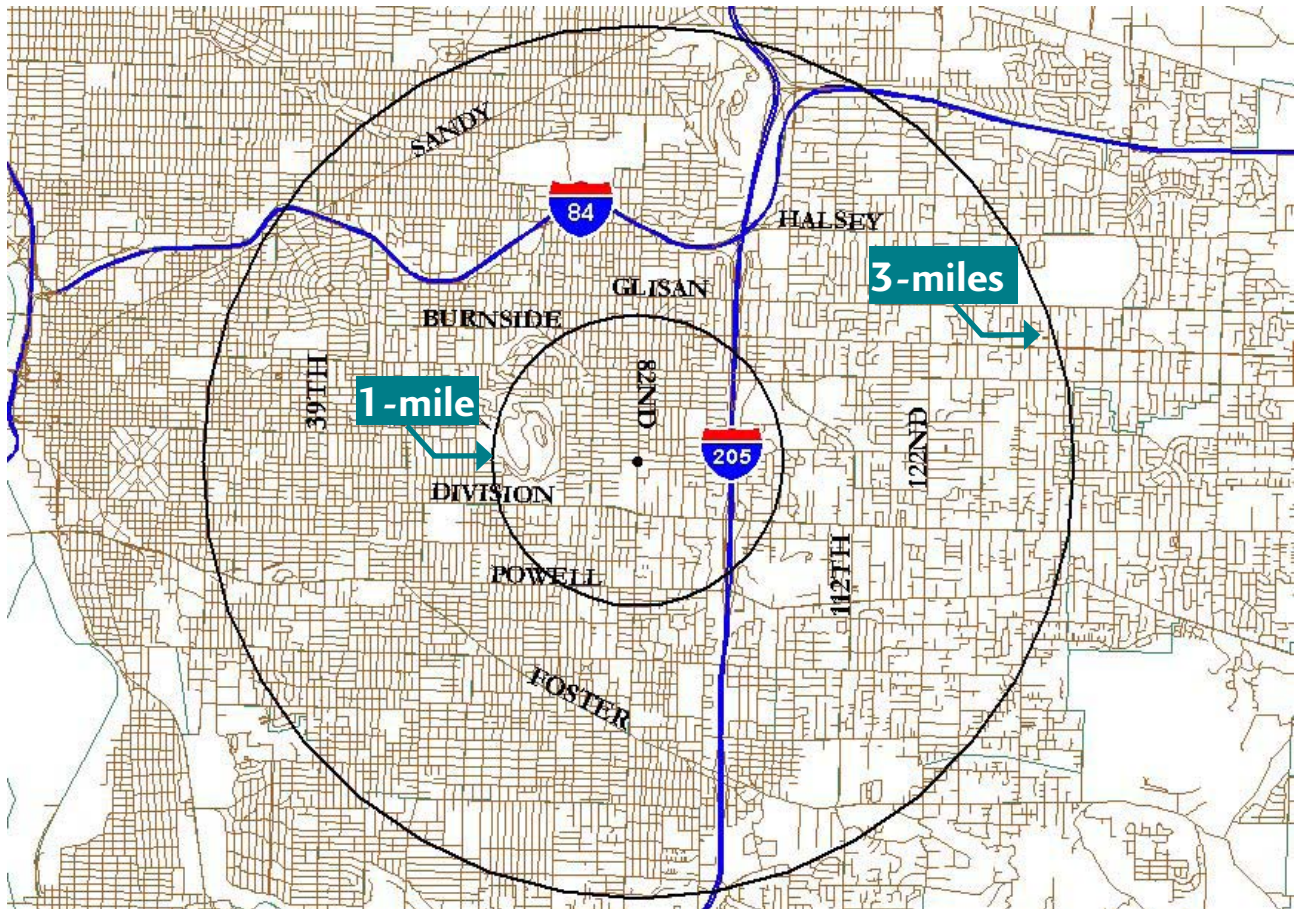
Interspersed with motor vehicle dealers and auto repair and maintenance shops, the Corridor has a strong niche in the used car retail market. Poor infrastructure, however, such as old utility poles and insufficient street lighting could be improved.



## Demographics

This section is designed to provide a technical examination of the conditions that impact the market demand for the 82nd Avenue Corridor. Market demand is a function of the disposable income that may be spent within the defined trade areas of a specified development or commercial district. The combined spending of residents, employees, and visitors to an area represents the ability of these groups to support commercial uses. Demand is based on the spending power that is available. As described in the Methodology, the majority of potential customers are assumed to be drawn from a three-mile area originating from the Corridor's center point. (See Figure 5). While the Corridor functions primarily as a neighborhood and community serving commercial center, some of its retail sales originate from beyond the neighborhood and community trade areas.

Figure 5: Map of Neighborhood (1-mile) and Community (3-mile) Trade Areas



Source: Portland Bureau of Planning and Metro RLIS, 2006

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 F. Population and household characteristics for 82nd Avenue 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<sup>1</sup>**

	2005 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	9,321	10,816	16%
Community Trade Area	81,127	95,003	17%
Portland	235,180	299,355	27%

Source: Metro

<sup>1</sup>Includes Metro Transportation Area Zones (TAZs) that have their center within the designated geography.

**Table 8: Employment Estimates and Forecasts<sup>1</sup>**

	2005 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	8,469	13,356	58%
Community Trade Area	66,146	90,461	37%
Portland	437,297	599,997	37%

Source: Metro

<sup>1</sup>Includes Metro Transportation Area Zones (TAZs) that have their center within the designated geography.



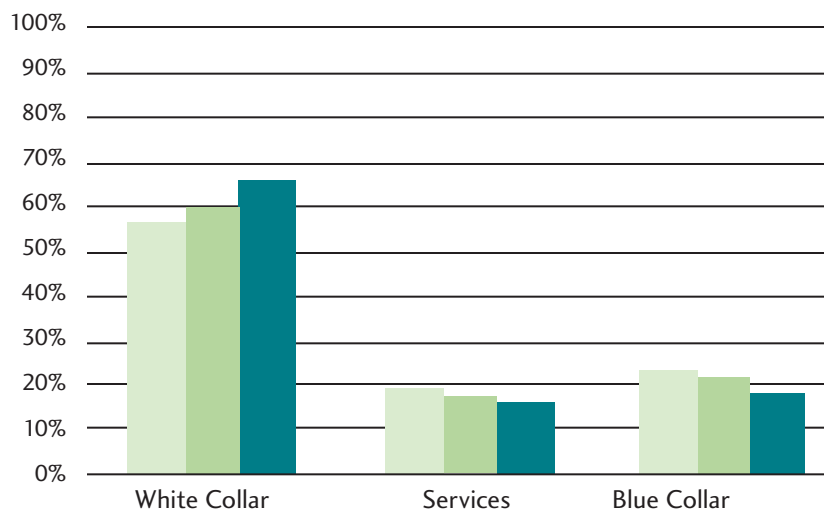
### Findings:

- The neighborhood and community trade areas are projected to experience significantly lower population growth than the city between 2005 and 2030.
- However, the neighborhood trade area is projected to experience significantly higher employment growth than the community trade area and 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 6 below, at 57 percent, in the neighborhood trade area most employed persons age 16 and older are white collar workers. Compared to the City, however, the neighborhood has a lower concentration of white collar workers and a higher percentage of services and blue collar workers. 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. In addition, given that an estimated 43 percent of neighborhood residents are services and blue collar workers, a discount store or used merchandise store seeking to locate in Portland might consider the 82nd Avenue neighborhood trade area a good location. However, businesses such as gourmet grocers and high-end clothing stores that cater almost exclusively to college-educated, white collar professionals are likely to locate in a more affluent neighborhood than 82nd Avenue.

Figure 6: Employed Population 16+ by Occupation, 2005



Neighborhood Trade Area	57%	20%	28%
Community Trade Area	61%	17%	22%
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 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: Housing Characteristics

	Neighborhood Trade Area			Community Trade Area			Portland		
	2000	2005	2010	2000	2005	2010	2000	2005	2010
Total Housing Units	7,801	8,139	8,488	79,605	81,983	85,119	237,307	245,975	256,252
Occupancy Rate	95%	95%	95%	95%	95%	95%	94%	94%	94%
Vacancy Rate	5%	5%	5%	5%	5%	5%	6%	6%	6%
Homeownership Rate	62%	63%	63%	58%	60%	69%	56%	57%	57%
Median Home Value	\$137,033	\$185,078	\$241,905	\$142,801	\$192,401	\$251,468	\$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 neighborhood trade area is consistently higher than that of the community trade area and the City of Portland.
- While the median home value in all three geographies has increased significantly since 2000, the neighborhood trade area offers more affordable housing alternatives than the community trade area and the city as a whole. Given its relative affordability, the neighborhood trade area will remain an attractive location for residential and commercial investment.

## 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 2005 and 2010.

Table 10: Population By Age

Age Group	Neighborhood Trade Area			Community Trade Area			Portland		
	2000	2005	2010	2000	2005	2010	2000	2005	2010
0 - 19	25%	25%	24%	24%	24%	23%	24%	23%	22%
20 - 34	23%	22%	21%	25%	24%	23%	26%	25%	24%
35 - 64	38%	41%	43%	38%	40%	42%	39%	41%	42%
65+	14%	13%	13%	13%	12%	12%	12%	11%	12%
Median Age	36.3	37.4	38.9	35.1	36.2	37.4	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.
- In 2000, the neighborhood trade area had a slightly higher percentage of young people (ages 0 – 19) and elderly residents (age 65+) and a slightly higher median age than the community trade area and Citywide population. This trend is projected to continue through 2010.
- Between 2000 and 2010, the median age in all three geographies is projected to increase by more than two years.

### Household Income

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

Table 11 shows the estimated distribution of total households by household income in 2005 for the neighborhood and community trade areas and the City of Portland.



Some businesses provide specialized services within the predominant auto repair industry along 82nd Avenue, such as this truck canopy and accessory store.

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	7,724	100%	77,708	100%	230,860	100%
< \$15,000	869	11%	9,572	12%	30,924	13%
\$15,000 - \$24,999	970	13%	8,793	11%	25,464	11%
\$25,000 - \$34,999	849	11%	9,329	12%	26,571	12%
\$35,000 - \$49,999	1,393	18%	13,751	18%	38,479	17%
\$50,000 - \$74,999	1,757	23%	17,367	22%	46,738	20%
\$75,000 - \$99,999	1,055	14%	9,240	12%	25,749	11%
\$100,000 - \$149,999	656	9%	7,215	9%	23,833	10%
\$150,000 - \$199,999	107	1%	1,285	2%	5,930	3%
\$200,000+	68	1%	1,156	2%	7,172	3%
Median Household Income	\$47,211		\$46,758		\$47,277	
Average Household Income	\$56,241		\$57,565		\$63,788	
Per Capita Income	\$22,678		\$23,449		\$27,379	

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

### Findings:

- In 2005, the neighborhood and community trade areas had somewhat more middle-class households earning \$35,000 to \$99,999 than the City of Portland.
- The percentage of low-income households earning under \$25,000 is similar (23 to 24 percent) for all three geographies. This suggests that the commonly held public perception of 82nd Avenue as a place of higher than average poverty and blight is not entirely accurate. Poverty statistics from the 2000 Census indicate that there is a higher concentration of poverty in the southern part of the Corridor and in outer southeast Portland, which generally includes neighborhoods located south of Division and east of 82nd Avenue. In contrast, the poverty rate is lower in the northern part of the Corridor (north of Division) and closer-in neighborhoods to the north and northwest.
- There are fewer higher income households earning \$100,000 or more in the neighborhood and community trade areas than the city as a whole.



## 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 educational attainment while others make this decision based solely on disposable income. Table 12 provides an overview of educational attainment in the neighborhood and community market areas and the City of Portland. Given that the percentage of the neighborhood population with a four-year degree is low compared to the City, retailers that cater to consumers with higher levels of educational attainment may be less likely to locate there.

Table 12: Educational Attainment, 2000

Educational Attainment	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total	12,718	100%	128,528	100%	363,851	100%
Less than 9th Grade	1,081	8%	8,127	6%	18,744	5%
9th - 12th Grade, No Diploma	1,520	12%	13,661	11%	33,382	9%
High School Graduate	3,201	25%	32,675	25%	80,947	22%
Some College, No Degree	3,340	26%	33,376	26%	90,825	25%
Associate Degree	699	5%	7,463	6%	21,255	6%
Bachelor's Degree	2,062	16%	22,803	18%	77,321	21%
Master's/Professional/Doctorate	815	6%	10,423	8%	41,377	11%

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

### Findings:

- In the neighborhood trade area, more than 20 percent of individuals over age 25 did not have a high school diploma in 2000, compared with 17 percent in the community trade area and only 14 percent citywide.
- Advanced degrees, attained by six percent of residents, are far less common in the neighborhood trade area than the city, where 11 percent of residents earned a Master's, Professional, or Doctorate degree.
- Only 22 percent of the neighborhood population earned a Bachelor's Degree or higher, compared to 32 percent of the citywide population.

## Race and Ethnicity

Racial and ethnic distributions also impact consumer spending and business development. In recent years, for example, as the Asian American and Russian populations in nearby neighborhoods have grown, the Corridor has witnessed an increase in the number of ethnic markets and businesses oriented towards these ethnic groups. Table 13 shows racial and ethnic distributions for the neighborhood and community trade areas and the City of Portland.

**Table 13: Race and Ethnicity, 2000**

Race or Ethnicity	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total Population	18,558	100%	187,784	100%	529,121	100%
White Alone	14,048	76%	150,077	80%	412,241	78%
Black or African American Alone	461	2%	4,784	3%	35,115	7%
American Indian or Alaska Native Alone	159	1%	1,851	1%	5,587	1%
Asian Alone	2,497	13%	16,703	9%	33,470	6%
Pacific Islander Alone	107	1%	577	0%	1,993	0%
Some Other Race Alone	532	3%	6,148	3%	18,760	4%
Two or More Races	754	4%	7,644	4%	21,955	4%
Total Hispanic/Latino Origin	1,204	6%	11,966	6%	36,058	7%

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

### Findings:

- Between 1990 and 2000, the neighborhood's Asian and Pacific Islander population increased an estimated 62 percent, from 1,607 to 2,604 persons.
- In 2000, the neighborhood trade area was largely White (76 percent) with a growing percentage of Asian and Pacific Islanders at 14%.
- Compared to the city, where Asian and Pacific Islanders comprised just 6 percent of the population in 2000, the percentage of Asian and Pacific Islanders in the neighborhood trade area was more than two times greater.

# 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.



The Universal Center is located directly across from Portland Community College and the Eastgate Church, which provides a variety of necessary services for the area. One major barrier for this development is the lack of safe pedestrian crossings and discontinuous sidewalks in the surrounding area.

## BUSINESS AND CUSTOMER PERCEPTIONS

The majority of business owners surveyed along the Corridor felt cleanliness and safety 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	Cleanliness	Loading Zones
2	Safety	Number of Events/Promotions
3	Appearance of Buildings	Shopping Hours

While 37 percent of the business owner respondents rated the appearance of buildings and signs below average, most responded that neither their storefront nor interior require changes to attract more customers. Overall, the majority of business owners would like to make changes to their storefront as opposed to their interior, with 25 percent desiring interior improvements and 34 percent desiring exterior improvements (See Figures 7 and 8). A storefront enhancement program could be an option to help encourage revitalization of the Corridor.

Figure 7: Businesses that Desire Interior Improvements

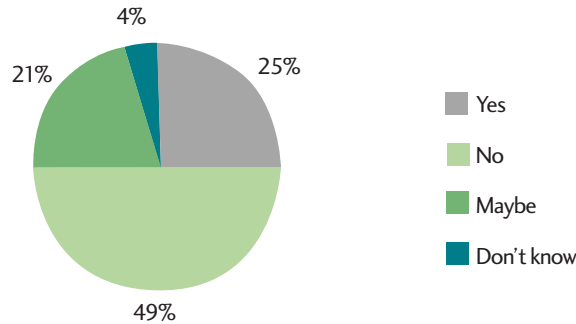
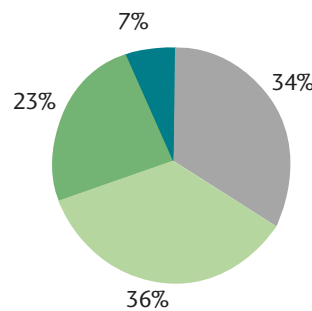


Figure 8: Businesses that Desire Storefront Improvements



For the customer intercept survey, the majority of respondents would like to see more trees and landscaping, benches and trash bins in regard to the appearance of the Corridor and specific ways it could be improved. A majority of respondents rated the appearance of signs as good or excellent.

Many customers indicated the corridor was somewhat safe; however, the opportunity to improve the overall perception of safety and crime in the area exists. For example, 51 percent consider the corridor safe and pleasant to walk while 43 percent do not (6 percent did not respond). The most common reason identified for a feeling of safety along the corridor included traffic devices such as lighting, signals, crosswalks and trees and the some respondents indicated that they feel safe specifically during the day. Reasons identified for not feeling safe included traffic, appearance of the corridor, crime and prostitutes and/or the homeless.



In addition to sidewalk and streetscape improvements, some segments of the Corridor are in need of set-backs from the right-of-way.



## 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>1</sup> that occurred within the City of Portland and 82nd Avenue between 2000 and 2005. For the purpose of analyzing crime trends, 82nd Avenue includes census tracts located within a quarter mile radius of the Corridor. When comparing crime and calls for service activity for 82nd Avenue to the city, it is important to keep in mind that 82nd Avenue 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 G and H for detailed maps of Crime and Calls for Service on 82nd Avenue. See Appendices I and J for a detailed map of Crime and Calls for Service Citywide.



The 82nd Avenue and Glisan Street intersection is dominated by auto-oriented businesses and characterized by high traffic volume and increasing congestion in recent years.

<sup>1</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	6	0	1	0	3	---	18	22	20	28	29	22	22%
Rape	21	21	10	17	19	12	-43%	369	305	354	310	313	325	-12%
Robbery	56	62	83	82	63	70	25%	1,455	1,272	1,296	1,375	1,291	1,139	-22%
Aggravated assault	184	178	163	152	135	135	-27%	3,864	2,963	2,844	2,732	2,405	2,376	-39%
<b>Total Person Crimes</b>	<b>261</b>	<b>267</b>	<b>256</b>	<b>252</b>	<b>217</b>	<b>220</b>	<b>-16%</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	298	335	361	427	531	398	34%	5,601	5,615	5,731	6,507	7,259	6,142	10%
Larceny	1,417	1,651	1,719	1,953	1,750	1,462	3%	25,063	28,457	28,052	29,748	28,452	25,941	4%
Motor vehicle theft	349	430	462	495	476	499	43%	4,782	4,765	5,255	5,982	6,052	5,834	22%
Arson	23	23	37	39	26	30	30%	510	385	496	384	363	375	-26%
<b>Total Property Crimes</b>	<b>2,087</b>	<b>2,439</b>	<b>2,579</b>	<b>2,914</b>	<b>2,783</b>	<b>2,389</b>	<b>14%</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>2,348</b>	<b>2,706</b>	<b>2,835</b>	<b>3,166</b>	<b>3,000</b>	<b>2,609</b>	<b>11%</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	11,716	12,996	13,726	15,032	15,506	15,035	28%	230,740	243,861	248,865	262,670	259,661	244,335	6%
Self-initiated	6,445	6,392	7,772	7,887	7,513	8,137	26%	202,811	176,363	185,261	192,184	173,269	189,861	-6%
<b>Total Calls for Service</b>	<b>18,161</b>	<b>19,388</b>	<b>21,498</b>	<b>22,919</b>	<b>23,019</b>	<b>23,172</b>	<b>28%</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 10/11/06.

Neighborhood Trade Area totals calculated using census tracts 7.01, 7.02, 16.01, 16.02, 17.01, 17.02 and 83.01.

## Findings:

- The number of crimes reported on 82nd Avenue and citywide peaked in 2003, during the height of the economic recession that lasted from 2001 to 2005.
- Violent crimes against persons citywide decreased at twice the rate of 82nd Avenue. The majority of crimes against persons that occurred on 82nd Avenue were concentrated around major nodes and intersections (See Appendix G). Crimes reported on 82nd Avenue are to some extent higher due to the high concentration of commercial activity.
- Between 2000 and 2005, property crimes increased 14 percent on 82nd Avenue compared to 6 percent citywide; however, the trend since 2003 is on the decline with a decrease of 18% between 2003 and 2005.
- Calls for service on 82nd Avenue increased over the five-year period by 28 percent. In comparison, the city remained constant after a slight increase in 2003. Increased calls for service on 82nd Avenue may be attributable, in part, to the high concentration of commercial activity and increasing traffic volumes on major transportation corridors such as Powell Boulevard, Division and Glisan Streets intersecting the Corridor.

# 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. A surplus may indicate 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 82nd Avenue 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.



This new, two-story building is an example of some of the new development that has started to take place along some portions of the Corridor.

## 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.

As evidenced by consumers who participated in the customer intercept survey, the most common purpose for a trip to the Corridor was to patronize neighborhood serving retailers for food. In fact, approximately 82 percent responded that the main purpose of their trip was to purchase groceries or dine out. Another 19 percent indicated that shopping for clothing and auto services, such as gas and auto parts and supplies, was the primary purpose of their trip. Nine percent of respondents made a health-related purchase, such as prescription drugs.

The most frequent destinations along the corridor, based on customer feedback, included restaurants such as Chinese restaurants and fast food, music and movie stores, auto-related locations for gas and servicing and stores carrying clothing.

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 subsector.

**Table 16: Retail Trade and Food & Drink Industry Summary**

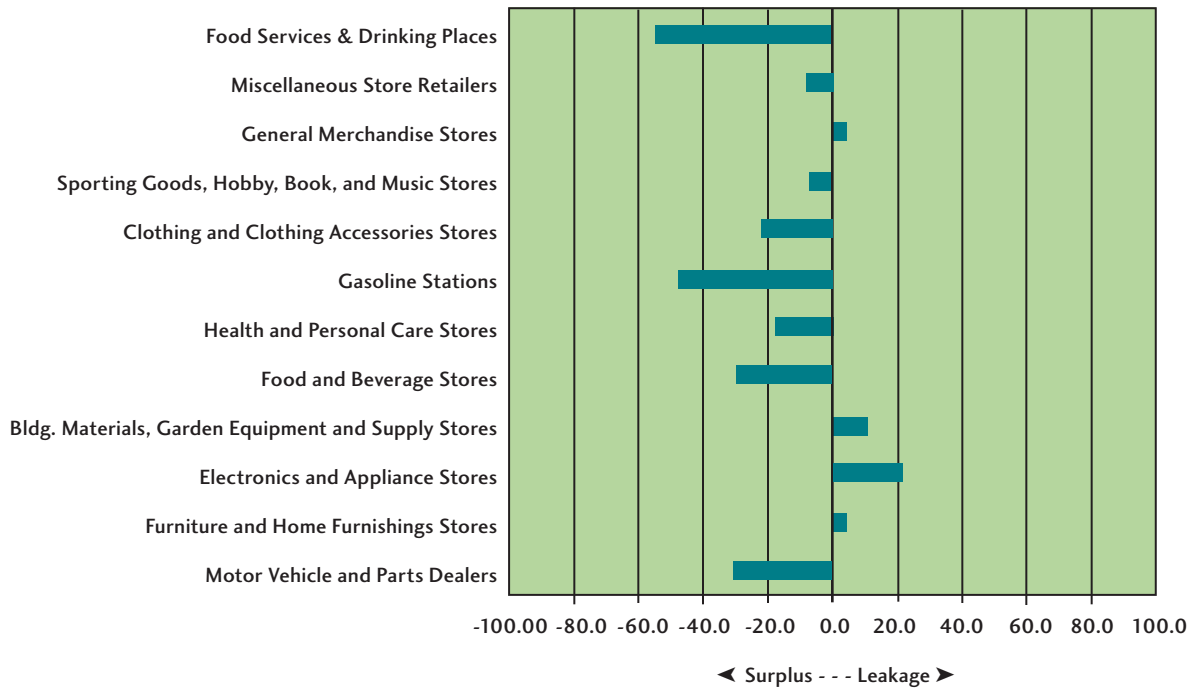
Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Leakage (+)/ Surplus (-) (\$)	Leakage (+)/ Surplus (-) Factor <sup>1</sup>	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$315,807,155	\$174,722,543	-\$141,084,612	-28.8	207
Total Retail Trade (NAICS 44-45)	\$221,016,189	\$146,968,039	-\$74,048,150	-20.1	149
Total Food & Drink (NAICS 722)	\$94,790,966	\$27,754,504	-\$67,036,462	-54.7	58

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:

- No retail sales leakage is reported within the broader Retail Trade and Food and Drink industries (NAICS 44-45, 722). The analysis shows an overall surplus of \$141,084,612, most of which is attributable to the Food Services and Drinking Places, Gasoline Stations, Motor Vehicles and Parts Dealers and Food and Beverage Stores industry subsectors (See Figure 10).
- This large retail surplus, which is spread across many industry subsectors, suggests that most of the neighborhood's demands for goods and services are being met. It also suggests that businesses in the neighborhood trade area have a customer base that extends beyond the immediate neighborhood. Most notably, the agglomeration of used car dealers on the 82nd Avenue Corridor draws from a regional customer base. Further, the Corridor's broad assortment of restaurants, including an estimated 19 Asian restaurants, attracts customers from outside the neighborhood trade area.
- Leakage in General Merchandise stores, Building Materials, and Electronics partly reflects concentrations of these businesses south of this segment of 82nd Avenue.
- According to the neighborhood trade area gap analysis, the leakage factor for the Electronic and Appliance Stores subsector is significant and the Corridor could accommodate one or more new businesses in this subsector. Specifically, the analysis indicates that the neighborhood could support an additional \$1.3 million in retail sales within this subsector, which commonly includes stores that specialize in the sale of cellular phones, computers, cameras, televisions, household appliances and other consumer electronic goods. According to the 2004 edition of the Dollars and Cents of Shopping Centers published by the Urban Land Institute, an electronics store located

in a neighborhood or community shopping center typically has a gross leasable area (GLA) of 2000 to 2500 square feet and might earn approximately \$276 per square foot of GLA annually. Therefore, a new electronics retailer with a GLA of 2,200 that locates in the Corridor could expect to gross about \$600,000. Net revenues would be considerably lower after expenses such as payroll, rent, property taxes and utilities are factored in.

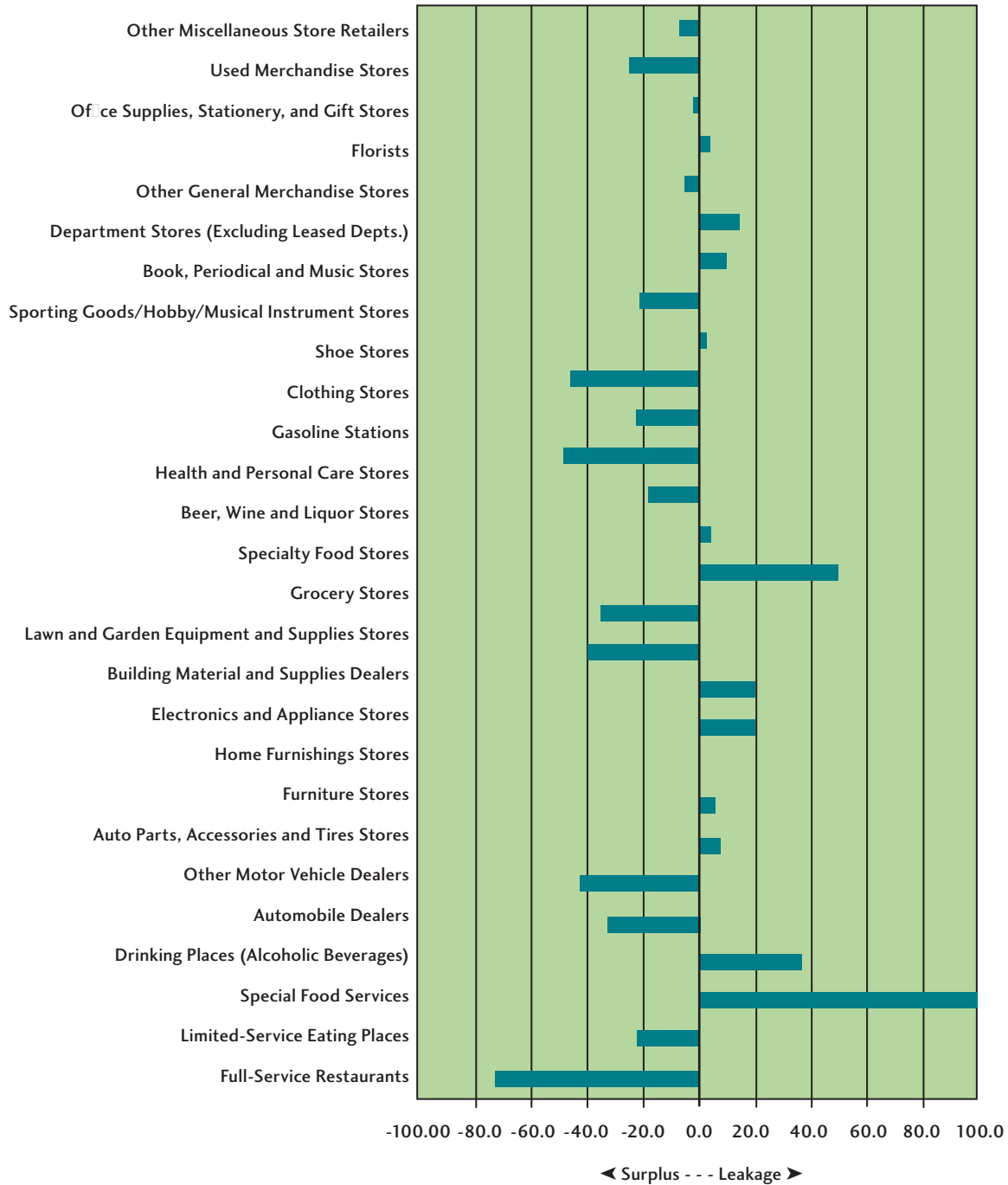
- In the business survey, 85 percent of business owners reported that business has either improved or stayed the same over the past five years. Of the 15 percent who reported a decline in business, traffic and transportation-related issues and the economy were the prime reasons mentioned. On the other hand, several respondents attributed their increase in business to the economy. Overall, the success of neighborhood businesses may be a result of the surplus experienced by the major industry subsectors along the Corridor.

Figure 11 on the next page provides a more detailed analysis of leakage/surplus by industry group. The industry groups are a subset of the broader industry subsectors. For example, the Food Services and Drinking Places subsector 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.



The Wing Ming Plaza offers a variety of Asian services ranging from an accounting and tax office, travel agency and construction and design firm to a restaurant, cafe and herbal store

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:

- There is market potential for Book, Periodical and Music Stores. While other retail potential exists, it is for businesses not typically classified as neighborhood retailers (e.g. Building Materials and Supplies Dealers, Lawn and Garden Equipment and Supplies Dealers, Electronics and Appliance Stores and Sporting Goods/Hobby/Book/Music Stores). These businesses generally serve larger trade areas and are therefore discussed in the community trade area findings.
- Specialty Food Stores and Special Food Services such as airline, cafeteria and concession contractors and operators as well as large catering companies have a high leakage factor. However, businesses in these industry groups have special location considerations and generally prefer to locate in major employment and cultural centers (e.g. Downtown Portland) with a high concentration of businesses and sports, entertainment, and recreational venues that use their services most frequently. Therefore, the leakage factors are likely overstated.
- The leakage observed in the Drinking Places industry subsector contrasts with the surplus of Full-Service Restaurants in the neighborhood trade area. However, many restaurants feature a bar, which may be separate from or integrated with the general dining area. Therefore, some of the leakage attributed to the lack of bars in the neighborhood trade area is absorbed by restaurants.
- Customer intercept and business owner surveys generally support the findings of the neighborhood gap analysis. Of the 89 customer survey respondents who answered the question, “What businesses should be located along the Corridor?” 42 percent chose a bookstore, 26 percent chose a bakery, coffee/sandwich shop and fresh/health food market, 21 percent chose a clothing store and toy store and 18 percent chose a garden center, sporting goods store and discount store.
- When asked to identify businesses that would complement their business, 32 percent of business owners indicated an office supply store, 28 percent a bookstore, 25 percent a clothing store, hardware store and recreation facility and 20 percent a health food store.
- Currently, neither a bookstore or fresh/health food market exists along the corridor.
- Two specialty bakeries, King’s Bakery and Santa Cruz Store & Bakery, are in operation. Additionally, five small coffee shops are located between SE Mill Street and SE Powell Boulevard and a new Starbucks recently opened at the Fubonn Center.
- The nearest office supply stores are more than 1.5 miles from the center of the Corridor. No major bookstores exist in proximity to the Corridor.

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



## 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)	\$ 2,421,716,812	\$ 1,805,639,442	-\$ 616,077,370	-14.6	1,658
Total Retail Trade (NAICS 44-45)	\$ 1,980,476,239	\$ 1,518,973,591	-\$ 461,502,648	-13.2	1,163
Total Food & Drink (NAICS 722)	\$ 441,240,573	\$ 286,665,851	-\$ 154,574,722	-21.2	495

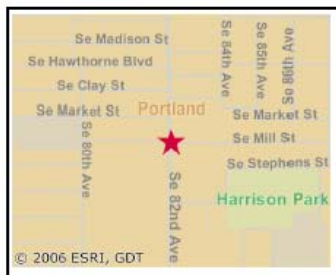
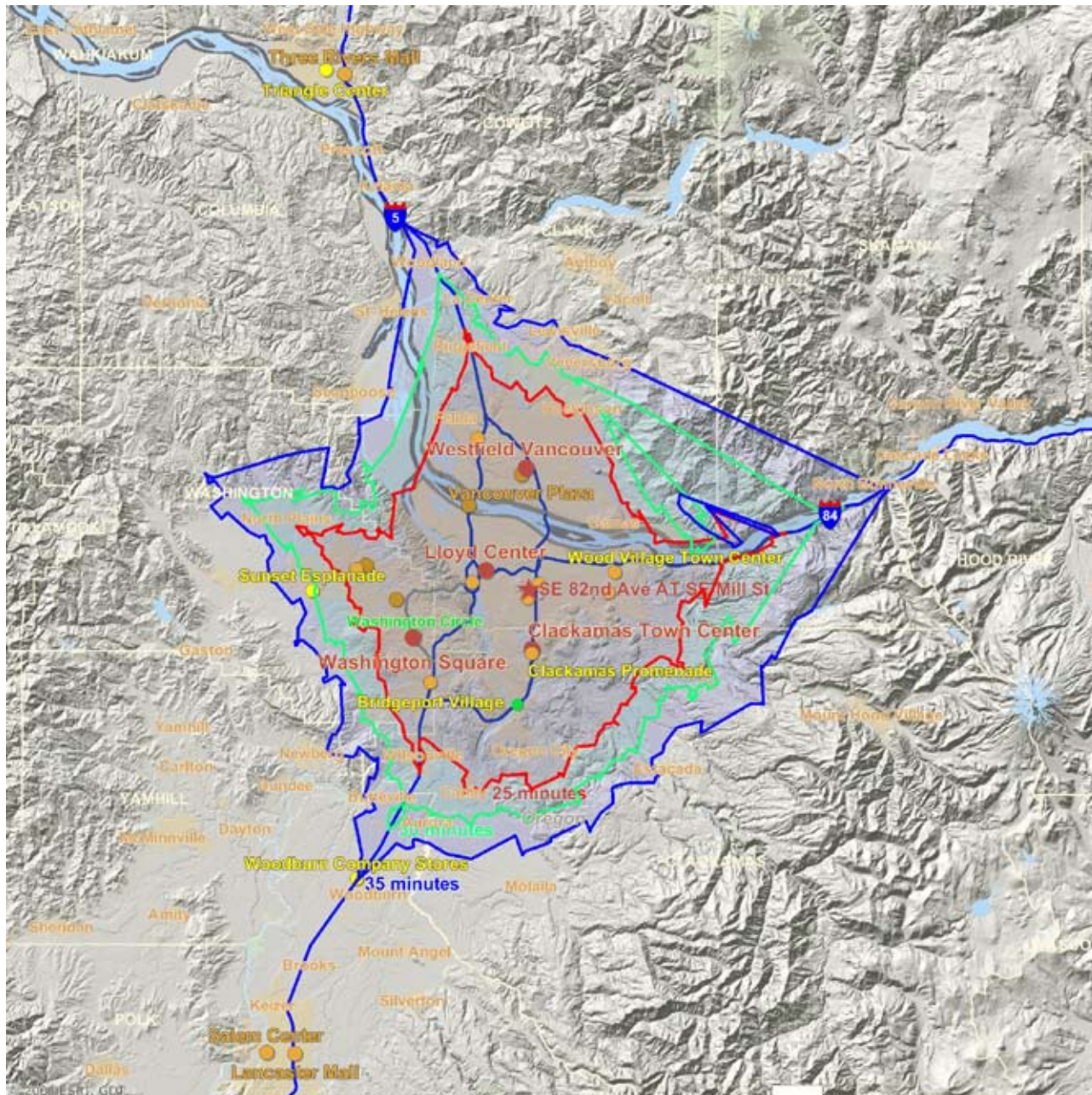
Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2005.

### Findings:

- No retail sales leakage is reported within the Retail Trade and Food and Drink industries (NAICS 44-45, 722), which generated an overall surplus of \$616,077,370 in 2005. This suggests that the community trade area, which has more than 10 times the number of households as the neighborhood trade area and contains an estimated 35 percent of the citywide population, is, overall, a strong retail marketplace.
- The community trade area encompasses several community shopping centers with 200,001 to 500,000 square feet of gross leasable area, including the Mall 205 shopping center and retail nodes along Glisan Street, 122nd Avenue and Stark Street and 82nd Avenue (south of Division). These community shopping centers compete for customers with major malls and regional retail centers outside the area (i.e. Clackamas Town Center Mall, Downtown Portland, Lloyd Center Mall) with a gross leasable area of 500,001 square feet or greater. Despite the presence of no major malls or regional shopping centers, the community trade area exhibits a strong retail performance.
- Unlike the neighborhood trade area, the community trade area features several large format retailers, including but not limited to Circuit City, Home Depot, Walmart, Target and two Winco Foods. Most large format retailers are national and regional chains that offer a wider selection of retail goods than neighborhood retailers at a lower cost. For this reason, they have significantly larger trade areas comprised of multiple neighborhoods and municipalities.
- According to the customer survey, the majority of customers drive to the Corridor with 87 percent living more than a mile away. As a result, many customers indicated they shop or dine at other locations outside of the Corridor such as Mall 205, Clackamas Town Center and Downtown Portland. Alternatively, this also indicates a draw of customers from outside the neighborhood and supports the surplus shown in some of the main industries along the Corridor.

A map of major shopping centers within the Portland Metro region that may compete with the Corridor for customers is shown in Figure 12. 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

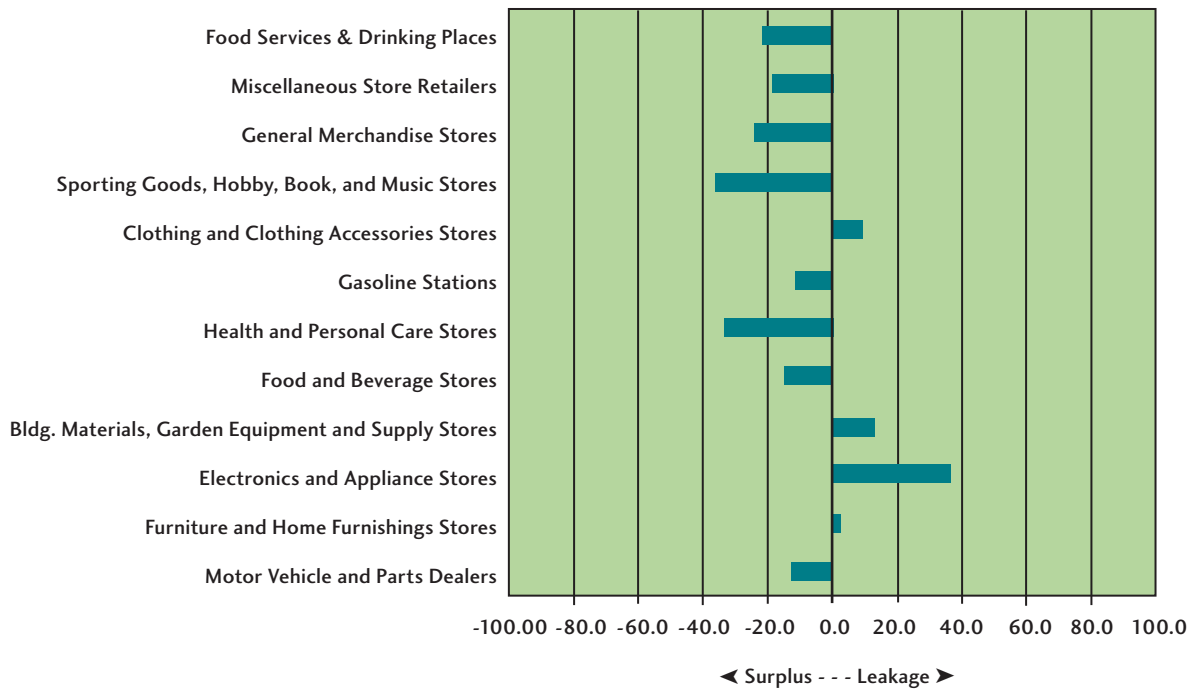


- Major Shopping Centers by Gross Leasable Area**
- More than 800,000 sq ft
  - 500,001 - 800,000 sq ft
  - 300,001 - 500,000 sq ft
  - 200,001 - 300,000 sq ft
  - Up to 200,001 sq ft



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

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

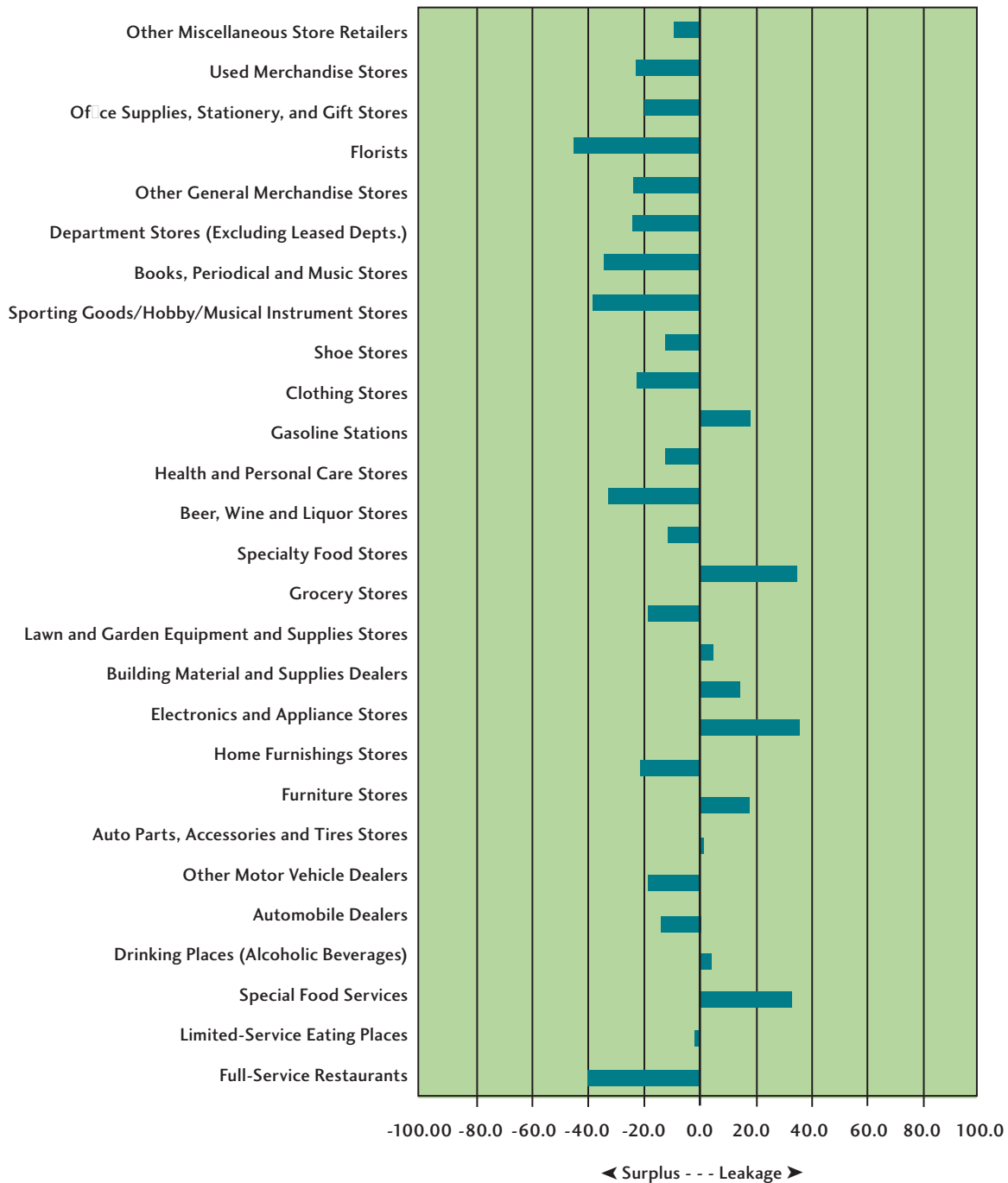


Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, All rights reserved. ESRI estimates for 2005.

**Findings:**

- In 2005, the Sporting Goods/Hobby/Book/Music Stores, General Merchandise Stores and Health and Personal Care Stores industry subsectors outperformed other subsectors in the community trade area. These subsectors generated a \$256,720,120 retail surplus in 2005 – 42 percent of the total surplus for Retail Trade and Food and Drink industries.
- Similar to the neighborhood trade area, there was significant leakage in the Electronics and Appliance Stores and Building Materials, Garden Equipment and Supply Stores industry subsectors.

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 satisfy most of the consumer needs of area households.
- Nevertheless, four industry groups—Electronics and Appliance Stores, Clothing Stores, Furniture Stores and Building Materials and Supplies Dealers—experienced notable retail leakage in 2005. As described above, some of this leakage is to major retail centers located just outside the area, including the Clackamas Town Center Mall, the Lloyd Center Mall and the 82nd Avenue retail corridor in unincorporated Clackamas County. For retailers with a large customer base, locating on the urban fringe enables them to attract customers from the inner city and suburban markets such as Clackamas County and east Multnomah County where robust population and housing growth has resulted in an increase in demand for consumer goods and services. Further, relative to urban areas, land is generally cheaper and the availability of large undeveloped sites is greater in the suburbs.



The Safeway grocery store located near Burnside dates to the late 1960s.

# 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>• Many low-density and redevelopable sites</li> <li>• Low vacancy rates</li> <li>• Ample on-street and off-street parking</li> <li>• Overall retail strength and diversity (large retail surplus)</li> <li>• The market performance of restaurants and car dealerships is especially strong</li> <li>• Niche market for immigrant populations</li> <li>• Agglomeration of used car dealerships</li> <li>• Active business district association</li> <li>• Presence of anchor developments</li> <li>• High traffic volumes and visibility</li> <li>• Freight access for large retailers</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>• Lack of built form consistency</li> <li>• Inadequate pedestrian and bicycle facilities, including streetscape facilities and lighting</li> <li>• Crime and perception of high crime</li> <li>• Perceived low level of cleanliness</li> <li>• Lack of landscaping and street trees</li> <li>• Poor building signage</li> <li>• Traffic congestion and delays</li> <li>• Retail leakage in the Electronics and Appliances and Building Materials, Garden Equipment and Supply Stores industry subsectors</li> <li>• Current zoning doesn't permit mixed-use development</li> <li>• Car lots, a low-density land use, detract from the Corridor's physical appearance and may increase vulnerability to crime due to relatively low employment density and foot traffic</li> </ul>
	<b>Opportunities</b> <ul style="list-style-type: none"> <li>• Regional draw</li> <li>• Growth in businesses specializing in Asian and Eastern European goods and services could make the Corridor a regional retail destination</li> <li>• Population and income growth</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>• Competition</li> <li>• Limited business assistance resources</li> <li>• 82nd Avenue is a State highway, subject to statewide rules and resource priorities</li> </ul>
EXTERNAL		



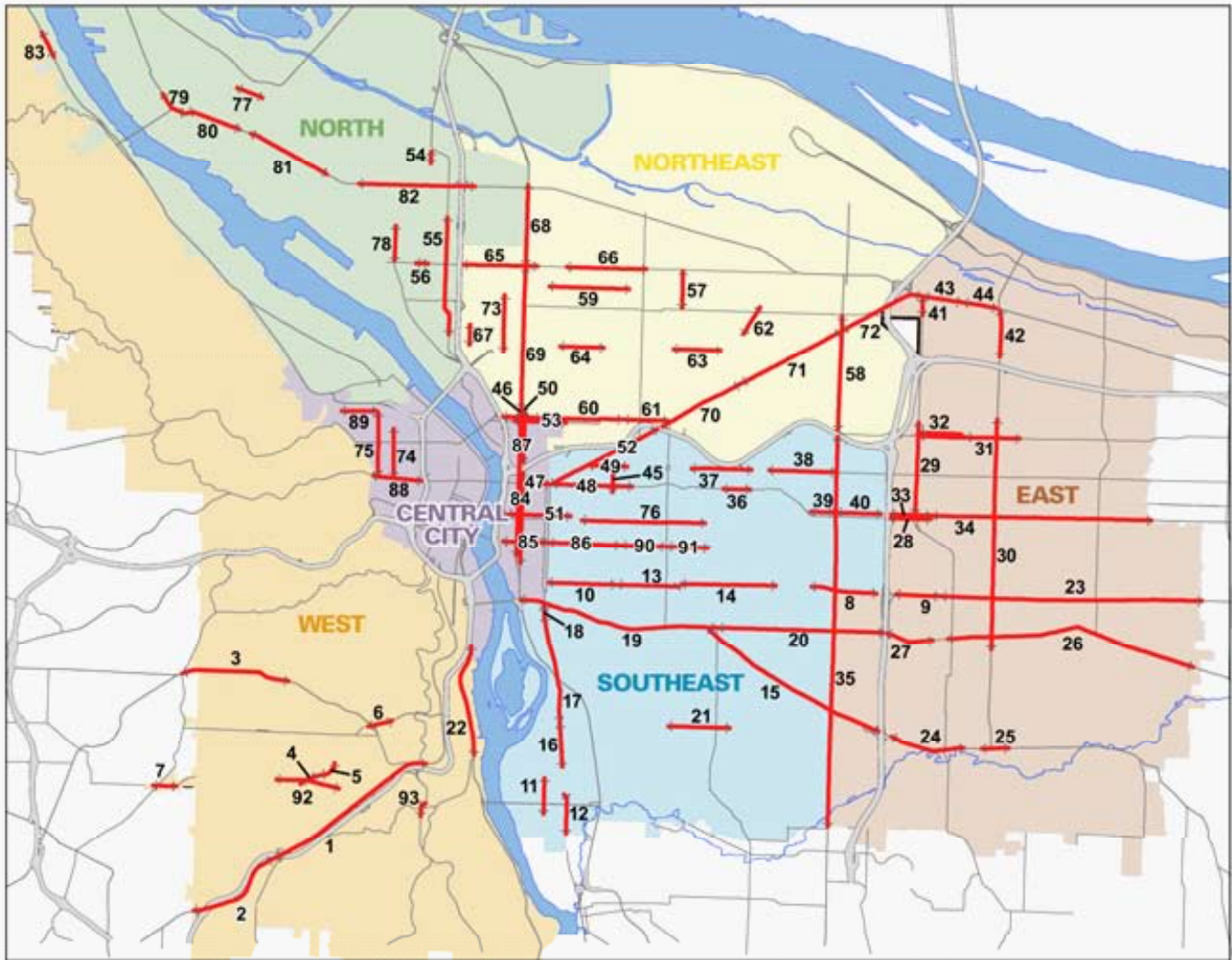


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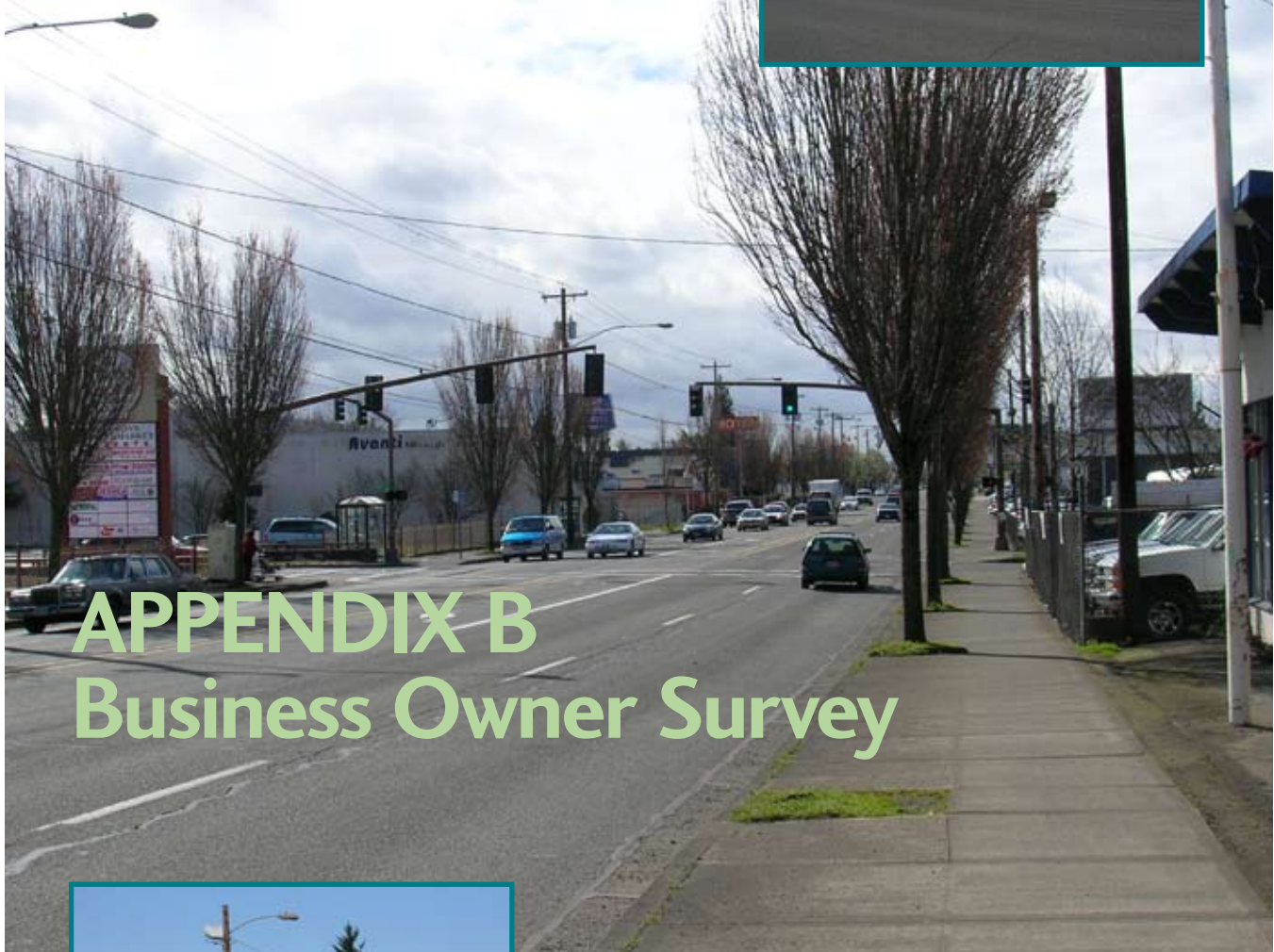


# MAP OF PORTLAND COMMERCIAL CORRIDORS



- |                  |                   |                     |                  |                    |                       |                 |                   |
|------------------|-------------------|---------------------|------------------|--------------------|-----------------------|-----------------|-------------------|
| 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     |                   |





## LETTER TO BUSINESS OWNER



CITY OF PORTLAND, OREGON  
BUREAU OF  
**Planning**

**Tom Potter, Mayor**  
Gill Kelley, Director

1900 SW 4th Ave., Suite 4100  
Portland, Oregon 97201-5380

Phone: 503-823-7700  
Fax: 503-823-7800  
TTY: 503-823-6868  
Email: [pdxplan@ci.portland.or.us](mailto:pdxplan@ci.portland.or.us)  
[www.portlandonline.com/planning](http://www.portlandonline.com/planning)

May 18, 2006

Dear Business Owner:

The City of Portland Bureau of Planning is conducting a market study for Sandy Boulevard between 57th and 95th. The purpose of this study is to assess the market along this commercial corridor. As part of the study, surveys are being distributed to area business owners and consumers during the months of May and June 2006.

The Bureau of Planning recognizes the importance of including the perspectives of business owners in the market analysis in order to appropriately evaluate the opportunities and constraints of the corridor. As a result, we would like to ask that you take 10 to 15 minutes to complete the survey. Individual responses will be confidential and no personal or business names or information will be used in the final report. The completed survey will be picked up from your place of business within one week of delivery by Bureau of Planning staff. If you are not available for us to pick up the survey, please mail or fax it to the address listed in the upper left hand corner.

As a token of our appreciation, you will receive a coupon for a free car wash from Washman Car Wash upon completion of the survey. Many thanks go to Washman Car Wash for their generous donation and support.

In the meantime, if you have any questions, please contact me at 503-823-7801 or by email at [Tina.Mosca@ci.portland.or.us](mailto:Tina.Mosca@ci.portland.or.us). Additional information about the Bureau of Planning and the Commercial Corridor Study can be found online at <http://www.portlandonline.com/planning/index.cfm?c=34004>.

Thank you for taking the time to participate in this important research process. We look forward to following up with you once your survey has been completed.

Sincerely,

Tina Mosca  
Economic Development Planner

## BUSINESS OWNER 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



## BUSINESS OWNER SURVEY

**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.

## BUSINESS OWNER SURVEY

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 \_\_\_\_\_

## BUSINESS OWNER SURVEY

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: Tina  
 1900 SW Fourth Avenue, Suite 4100  
 Portland, OR 97201-5350



# APPENDIX C

## Customer Intercept Survey





## CUSTOMER INTERCEPT STUDY

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 Tina Mosca at 503-823-7801 or Tina.Mosca@ci.portland.or.us

Date \_\_\_\_\_

Corridor 82nd Avenue – Glisan to Powell

<b>Sex</b>	Female <input type="checkbox"/>	Male <input type="checkbox"/>					
<b>Age</b>	15-24 <input type="checkbox"/>	25-34 <input type="checkbox"/>	35-44 <input type="checkbox"/>	45-54 <input type="checkbox"/>	55-64 <input type="checkbox"/>	65+ <input type="checkbox"/>	
<b>Household Income</b>							
	< \$25,000 <input type="checkbox"/>	\$25,000-\$34,999 <input type="checkbox"/>	\$35,000-\$49,999 <input type="checkbox"/>				
	\$50,000-\$74,999 <input type="checkbox"/>	\$75,000-\$99,999 <input type="checkbox"/>	>100,000 <input type="checkbox"/>				
<b>What is your zip code?</b>							
	97201 <input type="checkbox"/>	97202 <input type="checkbox"/>	97203 <input type="checkbox"/>	97213 <input type="checkbox"/>	97215 <input type="checkbox"/>	97216 <input type="checkbox"/>	97217 <input type="checkbox"/>
	97219 <input type="checkbox"/>	97220 <input type="checkbox"/>	97233 <input type="checkbox"/>	97236 <input type="checkbox"/>	97266 <input type="checkbox"/>	Other _____	

**1. What is the main purpose of your trip today?**

Apparel and Services <input type="checkbox"/>	Transportation (gas, car purchase) <input type="checkbox"/>
Computer <input type="checkbox"/>	Insurance <input type="checkbox"/>
Entertainment and recreation <input type="checkbox"/>	Household operations (childcare, moving, lawn care) <input type="checkbox"/>
Food at home <input type="checkbox"/>	Household furnishings and equipment <input type="checkbox"/>
Food away from home <input type="checkbox"/>	Home Repair <input type="checkbox"/>
Financial <input type="checkbox"/>	Health <input type="checkbox"/>
Travel <input type="checkbox"/>	Other <input type="checkbox"/>

**2. What do you typically buy along this corridor?** \_\_\_\_\_

**3. If you live in the area, are the goods and services meeting your basic/desired needs?**

Yes  No  Sometimes  Don't know  Don't live in the area

**4. How often do you shop along this corridor?**

First time  1-2 times per week  1-2 times per month  1-2 times per year   
 Other \_\_\_\_\_

**5. What day of the week do you typically shop along this corridor?**

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

**6. What time of day do you typically shop along this corridor?**

9-11 am  11 am-1 pm  1-3 pm  3-5 pm  5-7 pm  Other \_\_\_\_\_

## CUSTOMER INTERCEPT STUDY

7. Would you typically come to this corridor to make the purchase(s) you made today?

Yes  No

8. Where do you usually do most of your grocery and convenience shopping?

Target  Walmart  Food 4 Less  WinCo  Fubonn Center  Costco   
 Safeway  Trader Joe's  Specialty Market  Fred Meyer  Other \_\_\_\_\_

9. Where are some of the other places outside of this corridor you go to shop, dine or use commercial services?

Glisan Street  82nd Avenue  Mall 205  Eastport Plaza  Downtown Portland   
 Hollywood District  Clackamas Town Center  Specialty Markets  Other \_\_\_\_\_

10. How do you typically get to this corridor?

Walk  Bike  Drive  Bus

11. Please rate your overall perceptions of the corridor.

Criteria	Excellent	Good	Average	Fair	Poor
Parking	<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"/>
Traffic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotions	<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"/>
Quality of businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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"/>
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"/>
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"/>
Number of events and promotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. What improvements would you would like to see along this corridor?

Benches  More trees and landscaping  Improved lighting  Bus kiosks   
 Crosswalks  Bicycle racks  Trash receptacles  Bicycle lanes   
 Improved storefronts  More building maintenance  Other \_\_\_\_\_

13. Approximately how far do you live from here?

1-5 blocks  6-10 blocks  < 1 mile  > 1 mile  Other \_\_\_\_\_

## CUSTOMER INTERCEPT STUDY

14. From the following list of businesses, select FIVE that you feel would enhance your shopping experience 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"/>
Other (please list)	<input type="checkbox"/>	_____					

15. Do you consider it safe and pleasant to walk along this corridor?

Yes  No

15a. Why or why not? \_\_\_\_\_

16. What are your three most frequent destinations along this corridor?

\_\_\_\_\_

16a. Based on your previous response, what are the qualities that attract you to these frequent destinations?

(Select 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"/>	Entertainment/culture	<input type="checkbox"/>
Places to eat	<input type="checkbox"/>	Appearance of buildings	<input type="checkbox"/>
Prices of goods	<input type="checkbox"/>	Other _____	<input type="checkbox"/>

17. Are you active in your neighborhood or business association?

Yes  No

Thank You!

## BUSINESS OWNER AND CUSTOMER INTERCEPT SURVEY FINDINGS

The business owner and customer intercept surveys are an integral component of the 82nd Avenue Commercial Corridor Study. In addition to serving as a valuable information gathering tool, the survey process provides opportunities for Bureau of Planning staff to connect with business owners, business district association leaders and the general public.

### BUSINESS OWNER SURVEY SUMMARY

#### I. Methodology

All businesses along 82nd Avenue between Glisan Street and Powell Boulevard, which encompasses an estimated 200 businesses, were issued a survey. Surveys were hand-delivered to each place of business and picked up one week later. In some cases, business owners returned surveys via fax. Of the outreach to 203 businesses, 75 responded for a 37 percent response rate.

#### II. Business Survey Results

As shown in Table 1, the majority of respondents felt cleanliness and safety were most important for the health and vitality of the corridor. Appearance of buildings and signs, quality of businesses, traffic circulation and customer service were other important factors. The least important factors are also noted.

Table 1: Factors Impacting the Health and Vitality of the Corridor

Rank	Most Important	Least Important
1	Cleanliness	Loading Zones
2	Safety	Number of Events/Promotions
3	Appearance of Buildings	Shopping Hours

A majority of the respondents rated the selection of products and services, convenience of shopping hours, dining options and customer service as good or excellent. While 37 percent of the respondents rated the appearance of buildings and signs below average, most responded that neither their storefront nor interior require changes to attract more customers. Overall, the majority of business owners would like to make changes to their storefront as opposed to their interior (See Figures 1 and 2).

Figure 1: Businesses that Desire Interior Improvements

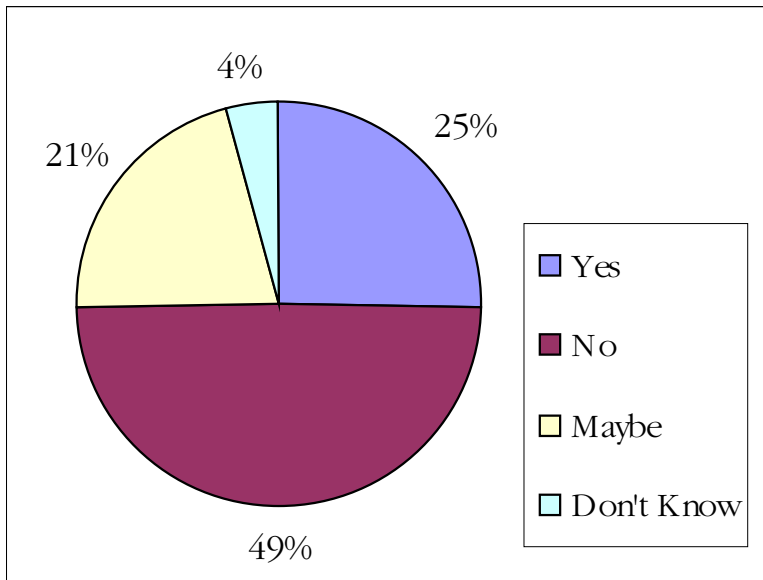
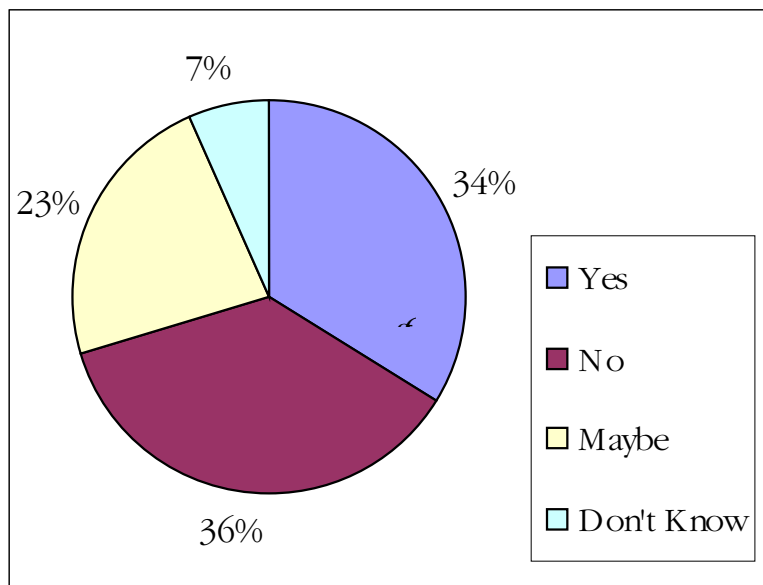


Figure 2: Businesses that Desire Storefront Improvements



When business owners were asked to identify businesses that would best complement their business, 32 percent chose an office supply store and 28 percent a bookstore. Currently, the nearest office supply stores are more than 1.5 miles from the center of the corridor. The Corridor doesn't have a bookstore nearby. Other complementary businesses totaling 25 percent of the responses included a clothing store, hardware store and recreation facility. Twenty percent also chose a health food store.



As illustrated in Table 2, 85 percent of the respondents reported that business has either improved or stayed the same over the past five years. Of the 15 percent who reported a decline in business, traffic and transportation-related issues and the economy were the prime reasons mentioned. Several respondents attributed their increase in business to the economy.

**Table 2: Business Status During Past Five Years**

	Improved	Stayed the Same	Declined
Retail	28	14	9
Office	2	5	2
Institutional	4	2	n/a

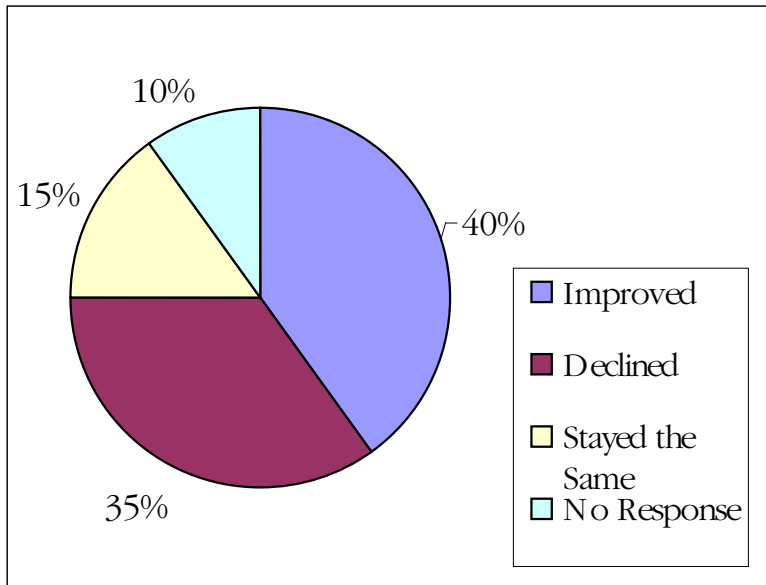
To better understand the future location decisions of Corridor businesses, business owners were asked about their future plans to reduce, relocate or expand business. Table 3 shows that the majority have plans to expand business operations in the future.

**Table 3: Future Business Plans**

	Businesses that Own		Businesses that Lease	
	Number	Percent	Number	Percent
Number of Businesses	26	36%	47	64%
Expand	8	31%	15	32%
Reduce	0	0%	2	4%
Relocate	0	0%	7	15%
In Portland	0		3	
Outside Portland	0		4	
None of the Above	13	50%	15	32%
Other	2	8%	0	0%
No Response	3	12%	8	17%

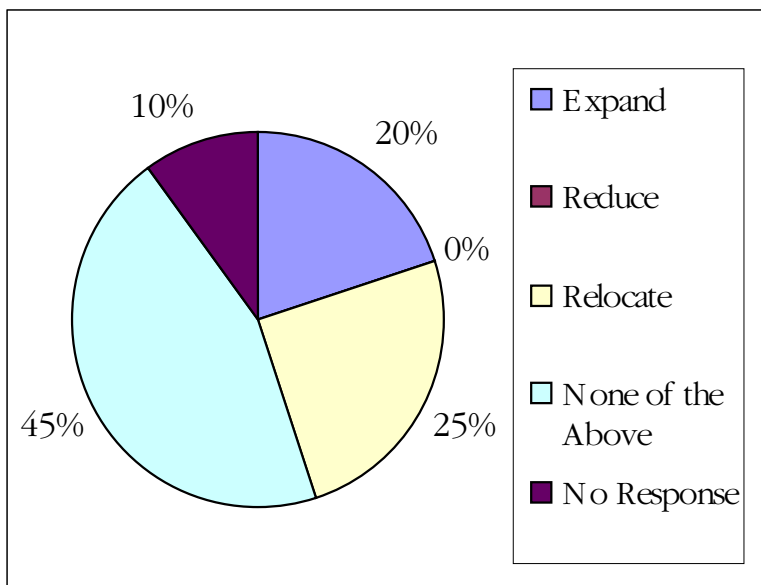
The majority of business owners who lease are satisfied with their location. Only 19 percent plan to reduce or relocate in the near future and none of the respondents indicated they were dissatisfied with their location. Of those who have plans to reduce, relocate or expand operations, 52 percent indicated having encountered financial barriers most commonly. Alternatively, 55 percent with plans to reduce, relocate or expand have not experienced any barriers. Additionally, the most common challenges businesses currently face include utility costs, health insurance costs, taxes and theft and vandalism. Of the business owners who indicated they were less than satisfied with their current location, 40 percent experienced improved business within the past five years and 35 percent experienced a decline (See Figure 3).

Figure 3: Status of Businesses Less than Satisfied with Location



Similarly, of the business owners who were less than satisfied with their current location, only 35 percent said they would either relocate or reduce operations while 20 percent plan to expand (See Figure 4).

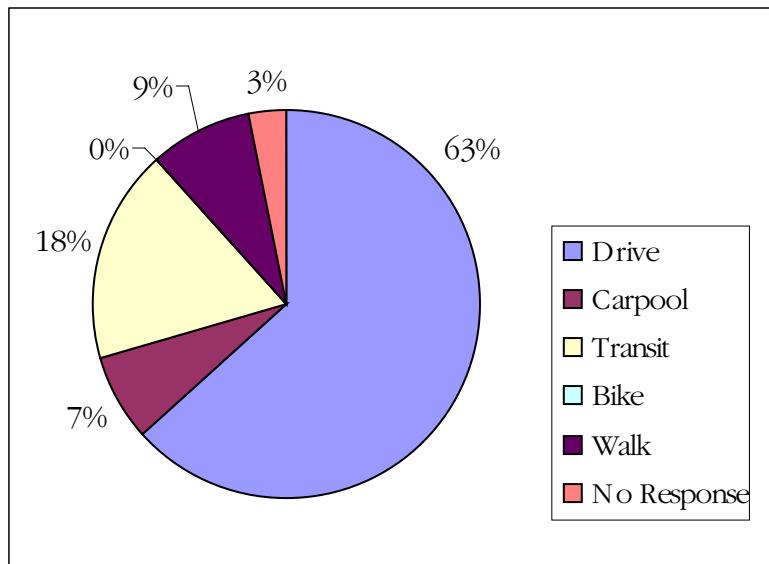
Figure 4: Plans for Businesses Less Than Satisfied With Location



Given these findings, a potential need exists for more diverse infrastructure options in order to accommodate growth and the desire of businesses to stay in the area.

Regardless of distance from the corridor, the majority of employees drive to work, reinforcing the auto-dependent nature of the corridor. As distance to the corridor increases, the percentage of people using alternative modes of transportation decreases. Diagram 6 illustrates the overall modes of transportation for all employers who responded to the survey.

Figure 5: Employee Mode of Transportation to Work



Business owners were asked to identify the characteristics that are the most important for the health and vitality of the corridor. In cross tabulating these responses with how the owners rated the corridor on corresponding aspects, Table 18 shows the comparisons indicating these are all areas that will require improvement and/or attention along the corridor.

Table 4: Characteristics Identified as Important for Health of Corridor

Rating	Cleanliness	Safety	Traffic Circulation
Excellent	1	0	1
Good	12	9	8
Average	15	13	8
Fair	12	9	5
Poor	9	14	7

## CUSTOMER SURVEY SUMMARY

### I. Methodology

A total of 101 customers were surveyed using a customer intercept survey. Surveys were conducted at various locations within the study area including Food 4 Less, Fubonn Center, Portland Community College and Walgreens.

### II. Demographics

Of the respondents, 59 percent were male and 41 percent were female. According to ESRI data for the study area from 2000-2010, the 10-year average indicates 42 percent of the residents within the area are females between the ages of 15-65+ and 40 percent are males. Based on these data, the survey demographics are representative with a slightly higher percentage of males. In addition, 61 percent of the respondents reported household incomes below \$34,999, with 34 percent earning less than \$25,000. Another 20 percent reported incomes between \$50,000 and \$74,999. Figure 6 provides a breakdown of household incomes for respondents. Eighty seven percent live more than a mile away from the corridor, supporting the community findings of the gap analysis (See Figure 7).

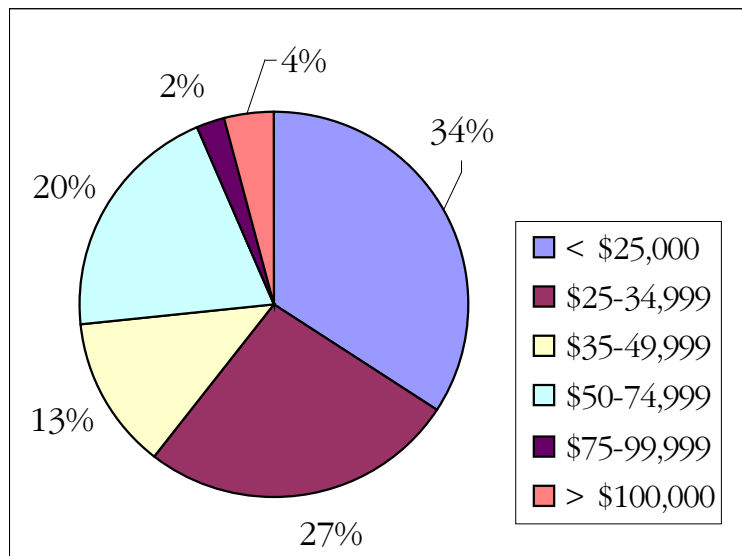
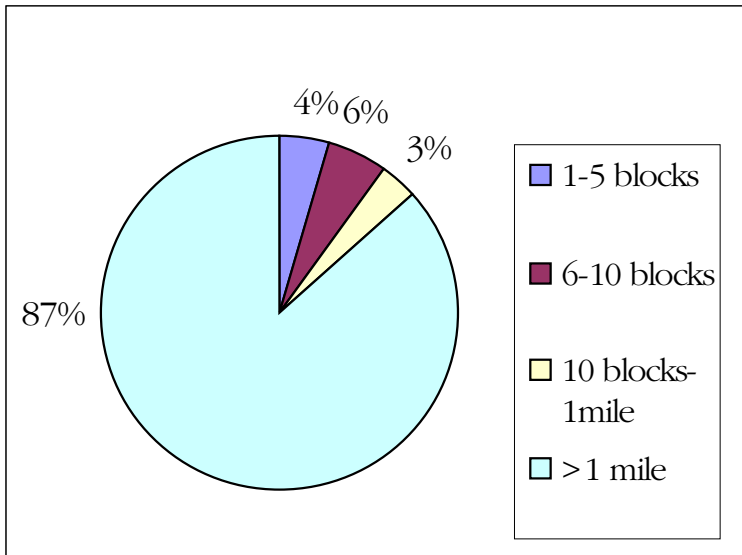


Figure 7: Customer Distance to Corridor



### III. Survey Results

Regardless of income, the main purpose of the trip to the corridor on the day the survey was conducted was for food; either groceries or to dine out, for 58 percent of the respondents. Along the corridor, 82 percent of respondents typically purchase food and 19 percent purchase auto services such as gas and auto parts and supplies. Another 19 percent purchase clothes and household items and approximately 9 percent typically make health-related purchases for prescriptions.

A majority of the respondents shop on Mondays, Fridays and Saturdays between the hours of 11 a.m. and 3 p.m. In comparison, business owners indicated they were busiest on Fridays and Saturdays.

The majority of respondents drive and approximately 30 percent either walk or take the bus with a small percentage traveling by bike (See Table 5).

Table 5: Mode of Transportation to Corridor

Mode	Percent
Drive	82%
Bus	15%
Walk	14%
Bike	2%

Related to the appearance of the corridor and specific ways in which the corridor could be improved, the majority of respondents would like to see more trees and landscaping, benches and trash bins. Alternatively, a majority of respondents rated the appearance of signs as good or excellent.



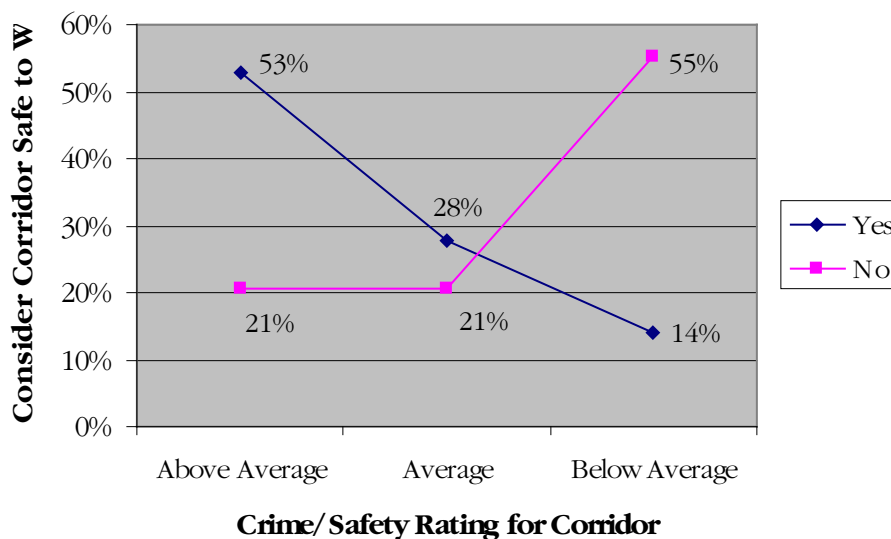
When asked to select businesses that would enhance the shopping experience along the corridor, the top choices were a bookstore, bakery, coffee/sandwich shop and fresh/health food market. Currently, neither a bookstore nor fresh/health food market exists along the corridor.

The most frequent destinations along the corridor included restaurants such as Chinese restaurants and fast food, music and movie stores, auto-related locations for gas and servicing and stores carrying clothing. The top three alternatives for places to shop or dine outside of the corridor include Mall 205, Clackamas Town Center and Downtown Portland.

Although the responses related to safety and crime weren't overwhelmingly negative along this corridor, the opportunity to improve the overall perception of safety and crime in the area exists. For example, while 33 percent said conditions related to safety/crime are good or excellent, another 37 percent rated safety/crime as fair or poor. Fifty one percent consider the corridor safe and pleasant to walk while 43 percent do not (6 percent did not respond). The most common reason identified for a feeling of safety along the corridor included traffic devices such as lighting, signals, crosswalks and trees and the majority indicated that they feel safe specifically during the day. Reasons identified for not feeling safe included traffic, appearance of the corridor, crime and prostitutes and/or the homeless. A majority of respondents rated traffic on the corridor fair or poor.

Diagram 9 compares a yes or no response to whether respondents consider it safe and pleasant to walk along the corridor to how respondents rated the corridor for safety and crime. Fifty three percent rated the corridor above average for safety and crime; however, 55 percent of those who believe the corridor is not safe and pleasant to walk rated it below average for safety and crime. This indicates varying perceptions along the corridor and a distinct divide between those who consider it safe and those who do not. Improving the perception of safety will be important to the enhancement of the corridor.

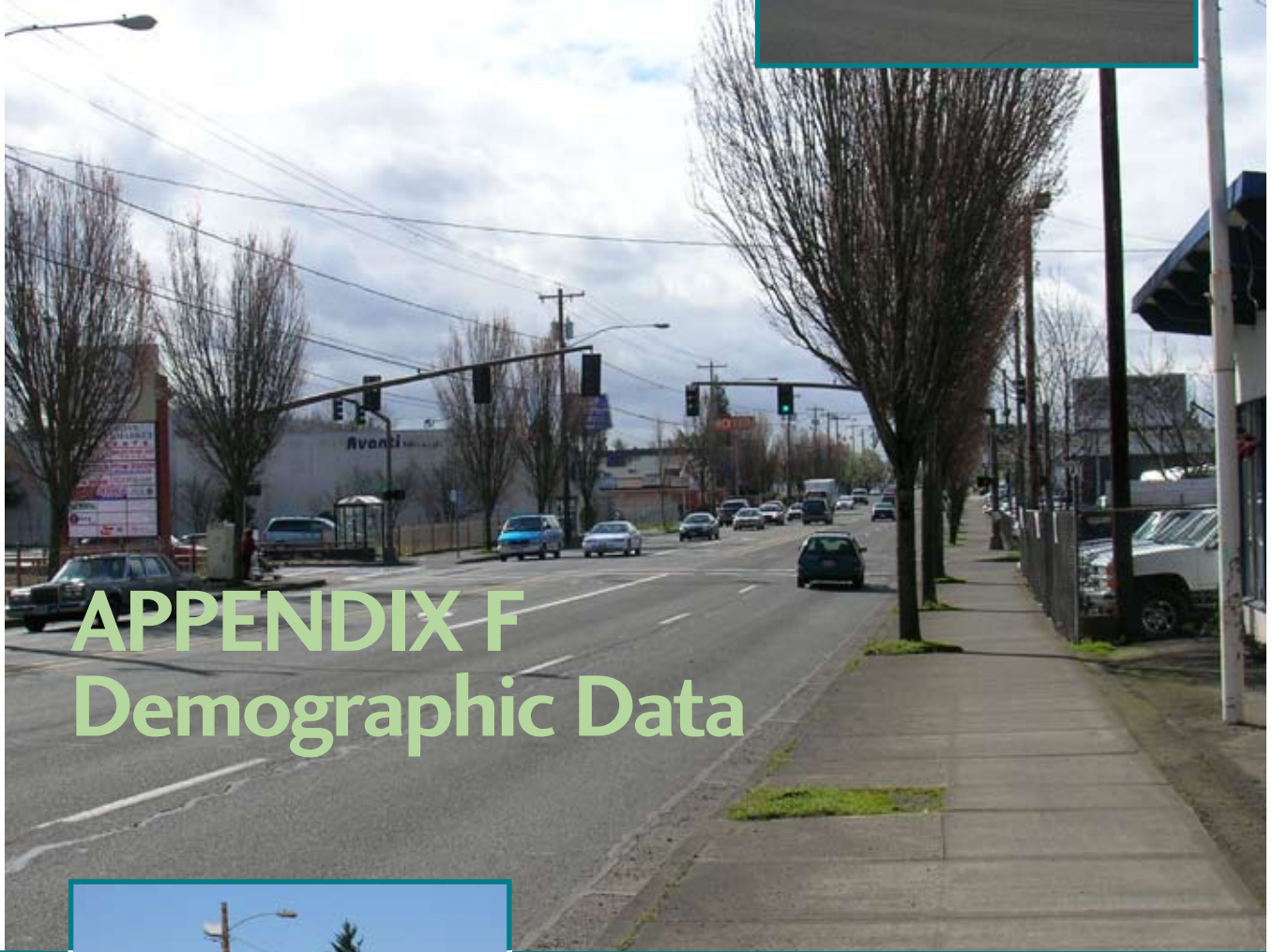
**Figure 8: Perception of Corridor Crime and Safety**





## BUSINESSES AND EMPLOYEES BY LAND USE

Land Use Category	Percent of Businesses				Percent of Employees			
	82nd Avenue		93 Corridors		82nd Avenue		93 Corridors	
	#	%	#	%	#	%	#	%
<b>Retail Trade</b>	<b>77</b>	<b>39%</b>	<b>1,511</b>	<b>21%</b>	<b>530</b>	<b>45%</b>	<b>12,478</b>	<b>19%</b>
Motor Vehicle Dealers	29	15%	126	2%	131	11%	1,773	3%
Food and Beverage Stores	9	5%	269	4%	215	18%	2,556	4%
All Other Retail Trade	39	20%	1,116	16%	184	16%	8,149	12%
<b>Leisure and Hospitality</b>	<b>50</b>	<b>25%</b>	<b>1,015</b>	<b>14%</b>	<b>296</b>	<b>25%</b>	<b>12,918</b>	<b>20%</b>
Restaurants and Bars	46	23%	885	13%	285	24%	11,660	18%
Lodging	3	2%	53	1%	10	1%	485	1%
Arts, Entertainment and Recreation	1	1%	77	1%	1	0%	773	1%
<b>Personal Services</b>	<b>34</b>	<b>17%</b>	<b>824</b>	<b>12%</b>	<b>123</b>	<b>11%</b>	<b>3,389</b>	<b>5%</b>
Automotive Repair and Maintenance	16	8%	262	4%	98	8%	1,299	2%
Personal Care and Laundry Facilities	18	9%	489	7%	25	2%	1,888	3%
Other Repair and Maintenance	0	0%	73	1%	0	0%	202	0%
<b>Office</b>	<b>29</b>	<b>15%</b>	<b>2,342</b>	<b>33%</b>	<b>102</b>	<b>9%</b>	<b>17,732</b>	<b>27%</b>
Medical and Dental Offices	7	4%	38	1%	4	0%	3,278	5%
Professional and Business Services	5	3%	733	10%	38	3%	4,515	7%
Financial Activities	17	9%	801	11%	60	5%	5,882	9%
Information	0	0%	129	2%	0	0%	185	0%
Government	0	0%	202	3%	0	0%	3,872	6%
<b>Institutional</b>	<b>7</b>	<b>4%</b>	<b>571</b>	<b>8%</b>	<b>117</b>	<b>10%</b>	<b>12,656</b>	<b>19%</b>
Schools and Colleges	3	2%	115	2%	101	9%	1,826	3%
Medical Centers and Residential Care Facilities	0	0%	38	1%	0	0%	7,197	11%
Religious, Community and Social Service Institutions	4	2%	418	6%	16	1%	3,633	6%
<b>Industrial</b>	<b>3</b>	<b>2%</b>	<b>788</b>	<b>11%</b>	<b>2</b>	<b>0%</b>	<b>6,409</b>	<b>10%</b>
<b>Total</b>	<b>200</b>	<b>100%</b>	<b>7,051</b>	<b>100%</b>	<b>1170</b>	<b>100%</b>	<b>65,582</b>	<b>100%</b>



# APPENDIX F Demographic Data



CITY OF PORTLAND, OREGON  
BUREAU OF  
**Planning**



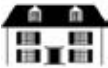


**DEMOGRAPHIC DATA - PAGE 1**



**Market Profile**

**Centerpoint: SE 82nd Ave AT SE Mill St**

Latitude: 45.5101 Longitude: -122.5786	Portland, OR 97216 Radius: 1.0 miles	Portland, OR 97216 Radius: 3.0 miles	Portland, OR 97216 Radius: 5.0 miles	
	2000 Total Population	18,558	187,784	404,656
	2000 Group Quarters	531	4,391	10,492
	2005 Total Population	19,478	194,102	420,505
	2010 Total Population	20,352	201,858	439,286
	2005 - 2010 Annual Rate	0.88%	0.79%	0.88%
	2000 Households	7,407	75,741	165,664
	2000 Average Household Size	2.43	2.42	2.38
	2005 Households	7,726	77,708	171,034
	2005 Average Household Size	2.45	2.44	2.4
	2010 Households	8,053	80,619	178,396
	2010 Average Household Size	2.46	2.45	2.4
	2005 - 2010 Annual Rate	0.83%	0.74%	0.85%
	2000 Families	4,424	42,971	92,649
	2000 Average Family Size	3.04	3.05	3.03
	2005 Families	4,586	43,856	95,137
	2005 Average Family Size	3.07	3.08	3.05
	2010 Families	4,699	44,720	97,599
	2010 Average Family Size	3.08	3.09	3.06
	2005 - 2010 Annual Rate	0.49%	0.39%	0.51%
	<b>2000 Housing Units</b>	7,776	79,607	175,120
	Owner Occupied Housing Units	58.5%	55.3%	53.5%
	Renter Occupied Housing Units	36.5%	39.9%	41.1%
	Vacant Housing Units	5.1%	4.9%	5.4%
	<b>2005 Housing Units</b>	8,139	81,983	181,428
	Owner Occupied Housing Units	59.7%	56.4%	54.5%
	Renter Occupied Housing Units	35.3%	38.4%	39.7%
	Vacant Housing Units	5.1%	5.2%	5.7%
	<b>2010 Housing Units</b>	8,488	85,119	189,383
	Owner Occupied Housing Units	59.5%	56.5%	54.5%
	Renter Occupied Housing Units	35.4%	38.2%	39.7%
	Vacant Housing Units	5.1%	5.3%	5.8%
	<b>Median Household Income</b>			
	2000	\$39,809	\$39,648	\$39,846
	2005	\$47,211	\$46,758	\$47,007
	2010	\$55,079	\$54,322	\$54,651
	<b>Median Home Value</b>			
	2000	\$137,033	\$142,801	\$150,367
	2005	\$185,078	\$192,401	\$204,334
	2010	\$241,905	\$251,468	\$269,221
	<b>Per Capita Income</b>			
	2000	\$18,894	\$19,610	\$20,676
	2005	\$22,678	\$23,449	\$24,860
	2010	\$26,820	\$27,985	\$29,823
	<b>Median Age</b>			
	2000	36.3	35.1	35.1
	2005	37.4	36.2	36.1
	2010	38.9	37.4	37.2

**Data Note:** Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. 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 2005 and 2010.





## DEMOGRAPHIC DATA - PAGE 2

### Market Profile

Centerpoint: SE 82nd Ave AT SE Mill St

Latitude: 45.5101 Longitude: -122.5786	Portland, OR 97216 Radius: 1.0 miles	Portland, OR 97216 Radius: 3.0 miles	Portland, OR 97216 Radius: 5.0 miles	
<b>2000 Households by Income</b>				
	Household Income Base	7,324	75,780	165,643
	< \$15,000	13.8%	15.1%	15.1%
	\$15,000 - \$24,999	14.8%	13.6%	13.6%
	\$25,000 - \$34,999	14.3%	15.0%	14.7%
	\$35,000 - \$49,999	19.0%	18.6%	18.2%
	\$50,000 - \$74,999	23.9%	21.9%	20.9%
	\$75,000 - \$99,999	9.2%	8.9%	9.3%
	\$100,000 - \$149,999	4.0%	4.9%	5.7%
	\$150,000 - \$199,999	0.3%	0.9%	1.2%
	\$200,000 +	0.7%	0.9%	1.2%
Average Household Income	\$46,801	\$47,479	\$49,557	
<b>2005 Households by Income</b>				
	Household Income Base	7,724	77,708	171,036
	< \$15,000	11.3%	12.3%	12.3%
	\$15,000 - \$24,999	12.6%	11.3%	11.1%
	\$25,000 - \$34,999	11.0%	12.0%	11.9%
	\$35,000 - \$49,999	18.0%	17.7%	17.8%
	\$50,000 - \$74,999	22.7%	22.3%	21.3%
	\$75,000 - \$99,999	13.7%	11.9%	11.6%
	\$100,000 - \$149,999	8.5%	9.3%	10.0%
	\$150,000 - \$199,999	1.4%	1.7%	2.1%
	\$200,000 +	0.9%	1.5%	2.1%
Average Household Income	\$56,241	\$57,565	\$60,068	
<b>2010 Households by Income</b>				
	Household Income Base	8,052	80,619	178,397
	< \$15,000	9.3%	10.3%	10.2%
	\$15,000 - \$24,999	9.8%	9.5%	9.4%
	\$25,000 - \$34,999	10.5%	10.0%	10.1%
	\$35,000 - \$49,999	15.1%	15.8%	15.6%
	\$50,000 - \$74,999	22.0%	21.4%	20.6%
	\$75,000 - \$99,999	13.5%	13.3%	12.8%
	\$100,000 - \$149,999	15.4%	13.9%	14.1%
	\$150,000 - \$199,999	2.5%	3.3%	3.8%
	\$200,000 +	1.8%	2.5%	3.3%
Average Household Income	\$66,805	\$68,989	\$72,317	
<b>2000 Owner Occupied HUs by Value</b>				
	Total	4,613	44,014	93,750
	< \$50,000	1.5%	1.7%	2.5%
	\$50,000 - \$99,999	11.7%	10.4%	9.1%
	\$100,000 - \$149,999	51.6%	45.1%	38.2%
	\$150,000 - \$199,999	25.6%	27.4%	28.8%
	\$200,000 - \$299,999	6.8%	12.5%	15.6%
	\$300,000 - \$499,999	2.6%	2.6%	4.9%
	\$500,000 - \$999,999	0.1%	0.2%	0.9%
	\$1,000,000+	0.2%	0.0%	0.1%
	Average Home Value	\$147,396	\$154,827	\$169,515
<b>2000 Specified Renter Occupied HUs by Contract Rent</b>				
	Total	2,784	31,754	71,890
	With Cash Rent	97.3%	97.6%	97.6%
	No Cash Rent	2.7%	2.4%	2.4%
	Median Rent	\$569	\$569	\$571
	Average Rent	\$601	\$591	\$597

**Data Note:** Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied HUs exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2005 and 2010.

**DEMOGRAPHIC DATA - PAGE 3**

**Market Profile**



**Centerpoint: SE 82nd Ave AT SE Mill St**

**Latitude: 45.5101**  
**Longitude: -122.5786**

**Portland, OR 97216**    **Portland, OR 97216**    **Portland, OR 97216**  
**Radius: 1.0 miles**    **Radius: 3.0 miles**    **Radius: 5.0 miles**



**2000 Population by Age**

Total	18,558	187,785	404,657
0 - 4	6.3%	6.5%	6.4%
5 - 9	6.2%	6.1%	6.1%
10 - 14	5.7%	5.8%	5.9%
15 - 24	13.3%	13.3%	13.4%
25 - 34	16.5%	18.1%	18.0%
35 - 44	16.3%	16.4%	16.3%
45 - 54	14.2%	14.1%	14.4%
55 - 64	7.5%	7.1%	7.4%
65 - 74	5.9%	5.5%	5.5%
75 - 84	6.0%	5.0%	4.7%
85+	2.2%	2.0%	1.8%
18+	78.3%	78.0%	78.1%

**2005 Population by Age**

Total	19,478	194,101	420,503
0 - 4	6.3%	6.5%	6.4%
5 - 9	6.0%	5.8%	5.8%
10 - 14	6.2%	5.9%	5.9%
15 - 24	12.9%	13.3%	13.7%
25 - 34	14.7%	16.6%	16.6%
35 - 44	16.2%	16.1%	15.7%
45 - 54	15.4%	14.9%	14.9%
55 - 64	9.4%	9.1%	9.5%
65 - 74	5.5%	4.9%	5.0%
75 - 84	4.9%	4.6%	4.5%
85+	2.5%	2.2%	2.1%
18+	78.3%	78.3%	78.5%

**2010 Population by Age**

Total	20,352	201,859	439,286
0 - 4	6.2%	6.5%	6.4%
5 - 9	5.5%	5.4%	5.3%
10 - 14	6.1%	5.8%	5.7%
15 - 24	12.8%	13.5%	13.8%
25 - 34	13.9%	15.4%	15.7%
35 - 44	15.5%	15.3%	15.0%
45 - 54	14.9%	14.5%	14.4%
55 - 64	12.5%	11.9%	12.0%
65 - 74	5.9%	5.4%	5.5%
75 - 84	4.2%	4.0%	4.0%
85+	2.6%	2.4%	2.3%
18+	78.8%	79.1%	79.3%

**2000 Population by Sex**

Males	48.5%	48.7%	49.2%
Females	51.5%	51.3%	50.8%

**2005 Population by Sex**

Males	48.7%	48.9%	49.4%
Females	51.3%	51.1%	50.6%

**2010 Population by Sex**

Males	48.8%	49.0%	49.5%
Females	51.2%	51.0%	50.5%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2005 and 2010.

## DEMOGRAPHIC DATA - PAGE 4



### Market Profile

**Centerpoint: SE 82nd Ave AT SE Mill St**

<b>Latitude:</b> 45.5101	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>
<b>Longitude:</b> -122.5786	<b>Radius: 1.0 miles</b>	<b>Radius: 3.0 miles</b>	<b>Radius: 5.0 miles</b>



#### 2000 Population by Race/ Ethnicity

	18,558	187,784	404,656
Total			
White Alone	75.7%	79.9%	79.2%
Black Alone	2.5%	2.5%	4.6%
American Indian Alone	0.9%	1.0%	1.0%
Asian or Pacific Islander Alone	14.0%	9.2%	7.2%
Some Other Race Alone	2.9%	3.3%	3.9%
Two or More Races	4.1%	4.1%	4.0%
Hispanic Origin	6.5%	6.4%	7.2%
Diversity Index	48.0	43.0	45.0

#### 2005 Population by Race/ Ethnicity

	19,478	194,102	420,504
Total			
White Alone	72.4%	77.2%	76.7%
Black Alone	2.7%	2.7%	4.8%
American Indian Alone	0.8%	1.0%	1.0%
Asian or Pacific Islander Alone	16.3%	10.7%	8.5%
Some Other Race Alone	3.5%	4.1%	4.8%
Two or More Races	4.3%	4.3%	4.3%
Hispanic Origin	8.0%	7.9%	8.8%
Diversity Index	53.1	48.1	49.9

#### 2010 Population by Race/ Ethnicity

	20,352	201,858	439,286
Total			
White Alone	69.1%	74.5%	74.2%
Black Alone	2.9%	2.9%	5.0%
American Indian Alone	0.8%	0.9%	1.0%
Asian or Pacific Islander Alone	18.5%	12.3%	9.7%
Some Other Race Alone	4.3%	4.9%	5.7%
Two or More Races	4.4%	4.5%	4.4%
Hispanic Origin	9.6%	9.6%	10.7%
Diversity Index	57.8	52.9	54.5



#### 2000 Population 3+ by School Enrollment

	17,832	180,578	389,168
Total			
Enrolled in Nursery/ Preschool	1.1%	1.5%	1.5%
Enrolled in Kindergarten	1.3%	1.1%	1.2%
Enrolled in Grade 1-8	10.0%	10.1%	10.0%
Enrolled in Grade 9-12	5.2%	4.9%	4.9%
Enrolled in College	5.9%	5.7%	5.5%
Enrolled in Grad/ Prof School	1.1%	1.4%	1.4%
Not Enrolled in School	75.3%	75.3%	75.5%

#### 2000 Population 25+ by Educational Attainment

	12,718	128,528	276,360
Total			
Less than 9th Grade	8.5%	6.3%	5.7%
9th - 12th Grade, No Diploma	12.0%	10.6%	10.2%
High School Graduate	25.2%	25.4%	24.5%
Some College, No Degree	26.3%	26.0%	26.2%
Associate Degree	5.5%	5.8%	6.1%
Bachelor's Degree	16.2%	17.7%	18.4%
Master's/ Prof/ Doctorate Degree	6.4%	8.1%	8.9%

**Data Note:** Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2005 and 2010.

**DEMOGRAPHIC DATA - PAGE 5**

**Market Profile**



**Centerpoint: SE 82nd Ave AT SE Mill St**

<b>Latitude: 45.5101</b>	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>
<b>Longitude: -122.5786</b>	<b>Radius: 1.0 miles</b>	<b>Radius: 3.0 miles</b>	<b>Radius: 5.0 miles</b>



**2000 Population 15+ by Sex and Marital Status**

Total	15,219	152,815	330,082
Females	52.4%	52.0%	51.3%
Never Married	13.8%	15.2%	14.9%
Married, not Separated	24.4%	22.6%	22.5%
Married, Separated	0.9%	1.1%	1.1%
Widowed	6.2%	5.3%	5.1%
Divorced	7.1%	7.7%	7.6%
Males	47.6%	48.0%	48.7%
Never Married	16.8%	17.9%	17.9%
Married, not Separated	24.2%	22.5%	23.0%
Married, Separated	0.8%	0.8%	0.9%
Widowed	1.1%	1.2%	1.1%
Divorced	4.6%	5.5%	5.8%



**2000 Population 16+ by Employment Status**

Total	14,927	150,595	325,582
In Labor Force	65.6%	68.3%	68.4%
Civilian Employed	61.8%	63.7%	63.7%
Civilian Unemployed	3.6%	4.6%	4.7%
In Armed Forces	0.2%	0.0%	0.0%
Not in Labor Force	34.4%	31.7%	31.6%

**2005 Civilian Population 16+ in Labor Force**

Civilian Employed	92.5%	90.4%	90.7%
Civilian Unemployed	7.5%	9.6%	9.3%

**2010 Civilian Population 16+ in Labor Force**

Civilian Employed	92.9%	91.0%	91.3%
Civilian Unemployed	7.1%	9.0%	8.7%

**2000 Females 16+ by Employment Status and Age of Children**

Total	7,804	78,295	167,033
Own Children < 6 Only	8.4%	7.6%	7.5%
Employed/in Armed Forces	5.4%	4.8%	4.6%
Unemployed	0.3%	0.4%	0.4%
Not in Labor Force	2.7%	2.5%	2.6%
Own Children <6 and 6-17	4.9%	5.1%	5.2%
Employed/in Armed Forces	2.8%	3.0%	3.0%
Unemployed	0.3%	0.2%	0.2%
Not in Labor Force	1.8%	1.9%	1.9%
Own Children 6-17 Only	13.0%	13.3%	13.3%
Employed/in Armed Forces	9.4%	9.8%	9.9%
Unemployed	0.3%	0.5%	0.5%
Not in Labor Force	3.2%	3.0%	3.0%
No Own Children < 18	73.7%	74.0%	74.0%
Employed/in Armed Forces	37.4%	40.7%	41.1%
Unemployed	2.2%	2.6%	2.7%
Not in Labor Force	34.1%	30.6%	30.2%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2005 and 2010.

**DEMOGRAPHIC DATA - PAGE 6**

**Market Profile**



**Centerpoint: SE 82nd Ave AT SE Mill St**

**Latitude: 45.5101**  
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**Portland, OR 97216**    **Portland, OR 97216**    **Portland, OR 97216**  
**Radius: 1.0 miles**    **Radius: 3.0 miles**    **Radius: 5.0 miles**



**2000 Households by Type**

	1.0 miles	3.0 miles	5.0 miles
Total	7,407	75,743	165,663
Family Households	59.7%	56.7%	55.9%
Married-couple Family	43.8%	40.5%	40.3%
With Related Children	19.9%	18.6%	18.2%
Other Family (No Spouse)	16.0%	16.3%	15.7%
With Related Children	9.5%	10.2%	10.0%
Nonfamily Households	40.3%	43.3%	44.1%
Householder Living Alone	29.2%	30.6%	32.0%
Householder Not Living Alone	11.0%	12.6%	12.1%
Households with Related Children	29.4%	28.8%	28.2%
Households with Persons 65+	25.3%	21.4%	20.9%

**2000 Households by Size**

	1.0 miles	3.0 miles	5.0 miles
Total	7,407	75,741	165,664
1 Person Household	29.2%	30.6%	32.0%
2 Person Household	34.3%	33.6%	33.6%
3 Person Household	15.4%	15.6%	15.0%
4 Person Household	11.5%	11.2%	10.9%
5 Person Household	5.5%	5.1%	4.9%
6 Person Household	2.2%	2.1%	2.0%
7+ Person Household	1.8%	1.8%	1.7%

**2000 Households by Year Householder Moved In**

	1.0 miles	3.0 miles	5.0 miles
Total	7,397	75,766	165,680
Moved in 1999 to March 2000	20.1%	23.4%	24.7%
Moved in 1995 to 1998	29.7%	30.0%	30.6%
Moved in 1990 to 1994	14.1%	15.4%	15.5%
Moved in 1980 to 1989	13.6%	12.9%	12.5%
Moved in 1970 to 1979	8.2%	8.2%	7.9%
Moved in 1969 or Earlier	14.2%	10.2%	8.8%
Median Year Householder Moved In	1995	1995	1996



**2000 Housing Units by Units in Structure**

	1.0 miles	3.0 miles	5.0 miles
Total	7,781	79,639	175,104
1, Detached	72.8%	67.1%	61.7%
1, Attached	2.1%	2.1%	2.3%
2	4.5%	5.1%	4.6%
3 or 4	4.7%	5.3%	5.5%
5 to 9	3.1%	4.7%	5.2%
10 to 19	4.0%	5.6%	6.0%
20+	8.3%	8.9%	12.7%
Mobile Home	0.4%	1.3%	1.8%
Other	0.0%	0.0%	0.2%

**2000 Housing Units by Year Structure Built**

	1.0 miles	3.0 miles	5.0 miles
Total	7,758	79,643	175,109
1999 to March 2000	1.5%	1.9%	1.9%
1995 to 1998	3.1%	3.7%	5.1%
1990 to 1994	3.3%	2.1%	3.8%
1980 to 1989	5.9%	3.9%	6.1%
1970 to 1979	8.6%	10.5%	12.2%
1969 or Earlier	77.7%	77.9%	70.9%
Median Year Structure Built	1954	1952	1955

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



**DEMOGRAPHIC DATA - PAGE 7**



**Market Profile**

**Centerpoint: SE 82nd Ave AT SE Mill St**

<b>Latitude:</b> 45.5101	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>
<b>Longitude:</b> -122.5786	<b>Radius: 1.0 miles</b>	<b>Radius: 3.0 miles</b>	<b>Radius: 5.0 miles</b>



**2000 Households by Type**

Total	7,407	75,743	165,663
Family Households	59.7%	56.7%	55.9%
Married-couple Family	43.8%	40.5%	40.3%
With Related Children	19.9%	18.6%	18.2%
Other Family (No Spouse)	16.0%	16.3%	15.7%
With Related Children	9.5%	10.2%	10.0%
Nonfamily Households	40.3%	43.3%	44.1%
Householder Living Alone	29.2%	30.6%	32.0%
Householder Not Living Alone	11.0%	12.6%	12.1%
Households with Related Children	29.4%	28.8%	28.2%
Households with Persons 65+	25.3%	21.4%	20.9%

**2000 Households by Size**

Total	7,407	75,741	165,664
1 Person Household	29.2%	30.6%	32.0%
2 Person Household	34.3%	33.6%	33.6%
3 Person Household	15.4%	15.6%	15.0%
4 Person Household	11.5%	11.2%	10.9%
5 Person Household	5.5%	5.1%	4.9%
6 Person Household	2.2%	2.1%	2.0%
7+ Person Household	1.8%	1.8%	1.7%

**2000 Households by Year Householder Moved In**

Total	7,397	75,766	165,680
Moved in 1999 to March 2000	20.1%	23.4%	24.7%
Moved in 1995 to 1998	29.7%	30.0%	30.6%
Moved in 1990 to 1994	14.1%	15.4%	15.5%
Moved in 1980 to 1989	13.6%	12.9%	12.5%
Moved in 1970 to 1979	8.2%	8.2%	7.9%
Moved in 1969 or Earlier	14.2%	10.2%	8.8%
Median Year Householder Moved In	1995	1995	1996



**2000 Housing Units by Units in Structure**

Total	7,781	79,639	175,104
1, Detached	72.8%	67.1%	61.7%
1, Attached	2.1%	2.1%	2.3%
2	4.5%	5.1%	4.6%
3 or 4	4.7%	5.3%	5.5%
5 to 9	3.1%	4.7%	5.2%
10 to 19	4.0%	5.6%	6.0%
20+	8.3%	8.9%	12.7%
Mobile Home	0.4%	1.3%	1.8%
Other	0.0%	0.0%	0.2%

**2000 Housing Units by Year Structure Built**

Total	7,758	79,643	175,109
1999 to March 2000	1.5%	1.9%	1.9%
1995 to 1998	3.1%	3.7%	5.1%
1990 to 1994	3.3%	2.1%	3.8%
1980 to 1989	5.9%	3.9%	6.1%
1970 to 1979	8.6%	10.5%	12.2%
1969 or Earlier	77.7%	77.9%	70.9%
Median Year Structure Built	1954	1952	1955

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



## DEMOGRAPHIC DATA - PAGE 8

### Market Profile

**Centerpoint: SE 82nd Ave AT SE Mill St**

<b>Latitude:</b> 45.5101	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>	<b>Portland, OR 97216</b>
<b>Longitude:</b> -122.5786	<b>Radius: 1.0 miles</b>	<b>Radius: 3.0 miles</b>	<b>Radius: 5.0 miles</b>

#### Top 3 Tapestry Segments

1.	Main Street, USA	Main Street, USA	Main Street, USA
2.	Rustbelt Traditions	Metropolitans	Metropolitans
3.	Pleasant-Ville	Old and Newcomers	Old and Newcomers



**2005 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.**

Apparel & Services: Total \$	\$12,629,338	\$130,988,456	\$302,118,325
Average Spent	\$1,634.65	\$1,685.65	\$1,766.42
Spending Potential Index	62	64	67
Computers & Accessories: Total \$	\$1,643,014	\$17,028,402	\$39,155,988
Average Spent	\$212.66	\$219.13	\$228.94
Spending Potential Index	86	88	92
Education: Total \$	\$7,608,972	\$78,550,358	\$179,252,086
Average Spent	\$984.85	\$1,010.84	\$1,048.05
Spending Potential Index	90	93	96
Entertainment/Recreation: Total \$	\$20,454,683	\$208,765,247	\$477,829,712
Average Spent	\$2,647.51	\$2,686.53	\$2,793.77
Spending Potential Index	83	84	87
Food at Home: Total \$	\$29,936,221	\$309,911,528	\$713,178,914
Average Spent	\$3,874.74	\$3,988.15	\$4,169.81
Spending Potential Index	81	84	88
Food Away from Home: Total \$	\$20,714,148	\$215,671,993	\$497,807,507
Average Spent	\$2,681.10	\$2,775.42	\$2,910.58
Spending Potential Index	83	86	90
Health Care: Total \$	\$21,552,778	\$219,688,589	\$501,212,371
Average Spent	\$2,789.64	\$2,827.10	\$2,930.48
Spending Potential Index	79	80	83
HH Furnishings & Equipment: Total	\$11,983,063	\$122,784,537	\$281,330,033
Average Spent	\$1,551.00	\$1,580.08	\$1,644.88
Spending Potential Index	73	74	77
Investments: Total \$	\$34,148,016	\$339,461,938	\$770,307,313
Average Spent	\$4,419.88	\$4,368.43	\$4,503.83
Spending Potential Index	98	97	100
Retail Goods: Total \$	\$149,075,782	\$1,540,812,785	\$3,541,589,135
Average Spent	\$19,295.34	\$19,828.24	\$20,706.93
Spending Potential Index	77	79	82
Shelter: Total \$	\$93,102,588	\$954,598,164	\$2,193,224,850
Average Spent	\$12,050.56	\$12,284.43	\$12,823.33
Spending Potential Index	87	89	93
TV/Video/Sound Equipment: Total \$	\$6,723,012	\$69,740,664	\$160,628,886
Average Spent	\$870.18	\$897.47	\$939.16
Spending Potential Index	82	85	89
Travel: Total \$	\$11,530,401	\$116,596,282	\$265,597,587
Average Spent	\$1,492.42	\$1,500.44	\$1,552.89
Spending Potential Index	86	87	90
Vehicle Maintenance & Repairs: Total	\$6,556,794	\$68,214,730	\$157,214,362
Average Spent	\$848.67	\$877.83	\$919.20
Spending Potential Index	82	85	89

**Data Note:** The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

**Source:** Expenditure data are derived from the 2001, 2002 and 2003 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2005 and 2010.

