

Sandy Boulevard Commercial Corridor RETAIL MARKET ANALYSIS



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Acknowledgments

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Table of Contents

Study Overview	1
Methodology	3
Existing Conditions	4
History	5
Transportation	5
Land use	6
Recent development	6
Mix Of Businesses And Land Uses	7
Sandy Boulevard In Relation To Other Corridors	7
Land Use Inventory	9
Industry Mix	14
Demographics	18
Population And Housing Trends	19
Business Environment	26
Business And Customer Perceptions	26
Crime Statistics	27
Corridor Performance	30
Retail Gap Analysis	30
Neighborhood Trade Area Gap Analysis	31
Community Trade Area Gap Analysis	34
Competitive Strengths And Weaknesses	39
Appendix	41

Study Overview

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



The most distinguishing feature of the Sandy Boulevard Corridor is its diagonal orientation. Many eclectic businesses locate on these odd shaped parcels..

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.

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

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

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

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

Methodology

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



Fairley's Pharmacy, located at the intersection of 72nd and Sandy, is an example of a thriving, family-owned and operated neighborhood business on the Sandy Corridor.

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 NE Sandy Boulevard and 76th Avenue were selected based upon a variety of factors, including, but not limited to, recent redevelopment, population demographics, business association activity and geographic proximity to other major malls and retail centers that are likely to compete with Corridor businesses for customers. While retail and commercial service businesses along the Corridor serve customers beyond the trade areas selected for this study, the majority of customers are presumed to originate from within a 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.

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

Existing Conditions

Overview of the Sandy Blvd. Corridor

The most distinguishing feature of the Sandy Boulevard Corridor (the “Corridor”) is its diagonal orientation. The Corridor cuts across the northeastern quadrant of the City, creating intersections with as many as six cross streets. One of the notable features of the Corridor is the variety of small and minority-owned businesses located there. These businesses have contributed to the strong, entrepreneurial character of the Corridor and its growing identity as an international marketplace.

The Corridor is located 5 miles northeast of downtown Portland and, as shown in Figure 1, extends roughly 2 miles along Sandy Boulevard from 57th Street to 92nd Street. It is contained within four Portland neighborhoods including Rose City Park, Roseway, Sumner, and Madison South, and is served by the Portland International District business association.

Some characteristics of the corridor: 4-lane arterial with on-street parking on both sides, average daily traffic is between 17,000-21,000, development patterns consist of mostly one- and two-story buildings with minimal landscaping integrated with the sites, there is inadequate public spaces and amenities and discontinuous setbacks with varying signage and façade treatments.

Some issues that affect the corridor and surrounding community might include:

- Uninviting pedestrian environment
- Age and condition of the buildings
- Underutilized and obsolete development sites
- Multiple ownership makes redevelopment a challenge
- Compatibility with adjacent residential neighborhoods is not clear
- Neighborhood Commercial nodes and community commercial needs

HISTORY

Originally a Native American Trail, Sandy Road was developed as a diagonal access route from Troutdale to East 16th Avenue during the Settlement Era. It provided overland access to Oregon Trail immigrants and also served as a primary farm-to-market route for the rapidly expanding cities of Portland and East Portland.

In 1909, Sandy became a city street from NE 28th Avenue to 82nd Avenue. It was paved in 1912-13, after which time the streetcar track was doubled and the road was designated a “boulevard.” Sandy Road became Sandy Boulevard during the early 1900s, reflecting the eastside’s transformation from a streetcar suburb to a motor city. As the automobile evolved into the predominant mode of transportation, Sandy Boulevard redeveloped into one of Portland’s first and most spectacular auto-oriented commercial strips.

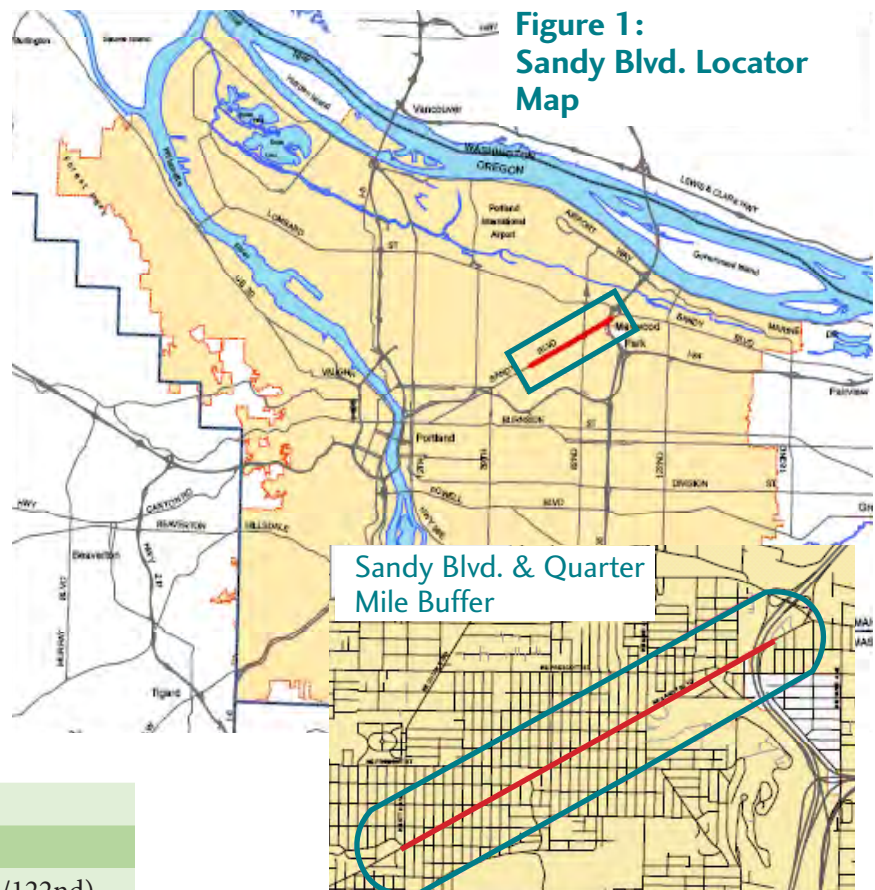
Beginning in the mid-1920s, and accelerating after World War II, many grocery stores, car dealerships, and other businesses moved out of the city to the suburban strip. There they created a bustling scene where car-owning consumers could buy almost anything they needed. By moving commercial life out of the central business districts, suburban strips contributed to the economic decline of downtowns. As more people moved into the suburbs, the strips also became centers of social life.

TRANSPORTATION

Sandy Boulevard is a State Highway that extends from Troutdale to NE 7th Avenue. It is designated a four-lane arterial within the City of Portland’s functional classification system and features an overpass at Interstate 205 (I-205) and access to Interstate 84 (I-84) at 33rd Avenue. The Corridor is well-served by public transit, including four bus lines (see Table 1) and the MAX Red Line, accessible at the Parkrose/Sumner Transit Center east of the I-205 overpass. The MAX Red and Blue Lines are also available along neighboring corridors at the 82nd Avenue MAX Station and 60th Avenue MAX Station near I-84.

Table 1:
Bus Lines Serving the Corridor

Line 12 – Sandy Boulevard
Line 33 – Fremont Street
Line 71 – 57th Ave/Prescott Street (60th/122nd)
Line 72 – 82nd Ave/Killingsworth



LAND USE

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

The majority of Corridor businesses are small and minority-owned. Several office buildings exist with a few larger retail businesses and institutional facilities. The Corridor competes with major shopping centers in Portland as well as neighboring commercial corridors, including 82nd Avenue and Glisan Street. The Hollywood District, located west of the Corridor on Sandy Boulevard, is an active commercial and transit-oriented center. A synergy among other small businesses exists with Fremont Street, which is adjacent to the Corridor and intersects it at 72nd Street, creating a unique six-point intersection. Many of the commercial and retail services offered by Corridor businesses can be found in other corridors, but are highly specialized. Specialized products and services include gemstones, upholstery, antiques, tile and floor coverings, restaurant equipment and a variety of services catering to Vietnamese households. The area serves low-income residents and seniors with a predominance of Asian grocers, auto repair shops, restaurants, insurance agencies and professional offices.

RECENT DEVELOPMENT

Most buildings along the Corridor have small setbacks, multiple stories and a mix of uses. Historic buildings and infrastructure date back to a time when Sandy Boulevard was the heaviest traveled road into the City from outlying areas. Today, the infrastructure continues to provide a variety of storefront options well-suited for small businesses. More recently, new development interspersed along the Corridor suggests signs of revitalization. In 2006, Albina Community Bank opened a branch in a new building at 57th Avenue. The only full-service grocery store, Safeway, located within the two-mile stretch of the Corridor was recently remodeled. Portland Fire and Rescue Station #12, which also houses the City of Portland's Central Northeast Neighbors Community Center, was completed in 2002. Columbia Knoll, a nine-acre development of affordable apartments for families and seniors, opened in 2006. The Corridor has also become specialized in goods and services oriented to Asian consumers.



Safeway Anchors the mid-point of the corridor at the intersection of Sandy and Fremont Avenue.

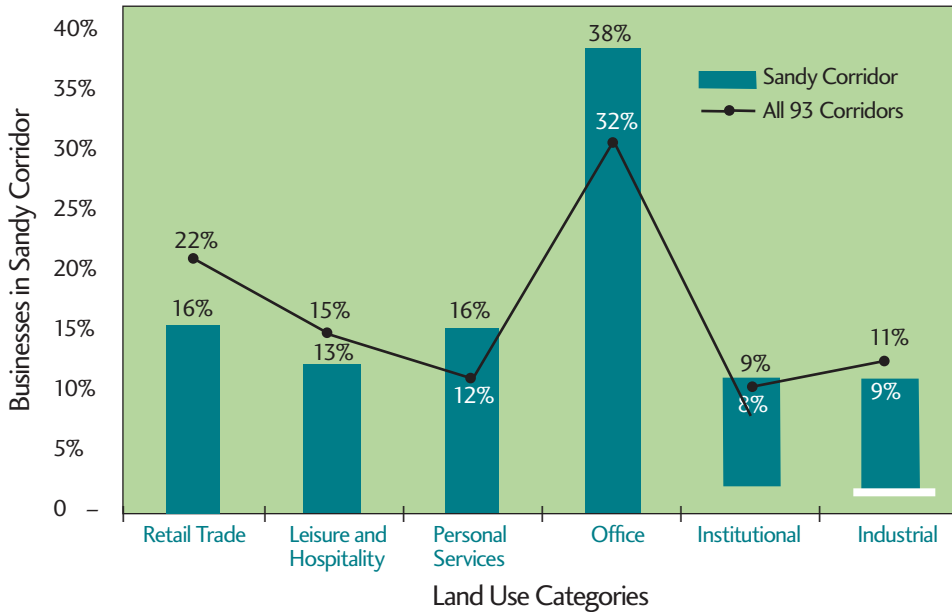
Mix of Businesses and Land Uses

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

SANDY BLVD. IN RELATION TO OTHER CORRIDORS

Figures 2 and 3 below show the percentage of businesses and employees by land use category within the Sandy Corridor in comparison to the 93 commercial corridors citywide identified in Phase I of this study. This Corridor is comprised of 232 businesses employing an estimated 627 persons compared to 6,777 businesses in all 93 corridors employing an estimated 64,941 persons. ce a comprehensive on-the-ground land use and business inventory was conducted along the Sandy Boulevard 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

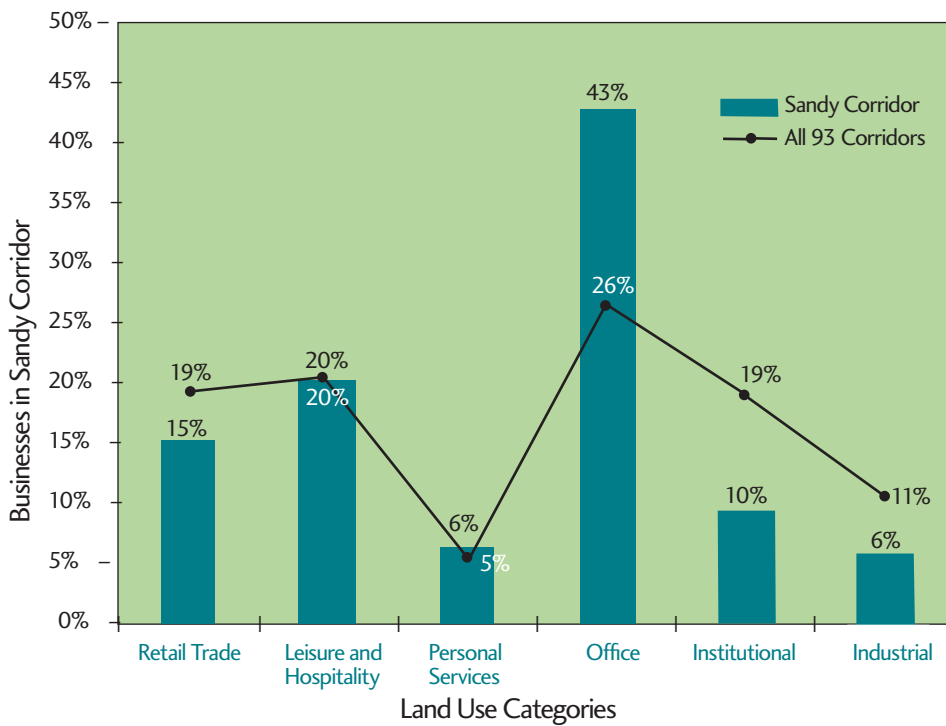


InfoUSA, 2004 data for 93 Corridors. Bureau of Planning Land Use Inventory for 82nd Avenue Corridor.

Findings:

- The business mix along the Sandy Corridor is generally similar to that of all corridors citywide. However, the Sandy Corridor has a slightly higher percentage of Office uses – 38 percent compared to 32 percent citywide. Further, at 16 percent, the percentage of Personal Services businesses along the Corridor is 4 percent higher than the percentage for all 93 corridors.
- The Corridor has fewer Retail Trade businesses than other corridors citywide – 16 percent compared to 22 percent for all 93 corridors.

Figure 3: Percentage of Employees by Land Use Category



InfoUSA, 2004 data for 93 Corridors. Bureau of Planning Land Use Inventory for Sandy Boulevard Corridor.

Findings:

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

LAND USE INVENTORY

A review of existing land use and development patterns can provide useful information about how an area has evolved over the years and what type of development is likely to occur in the future. In summer 2006, the Bureau of Planning conducted a land use inventory along the Sandy Corridor. The inventory identified employment uses and non-employment uses such as community facilities, open space, vacant land and space for lease. The Corridor is comprised of 232 businesses and 282 tax lots, which may include multiple uses within a building or strip mall as well as parking lots. The land use map in Figure 4 illustrates existing uses by tax lot. Tax lots with multiple uses were assigned a single land use based on the use that supports the largest amount of building square footage.



Kirby Vacuum Store has been on the corridor for many years.



Convenience Market near 90th and Sandy—shows a milieu of sign types.

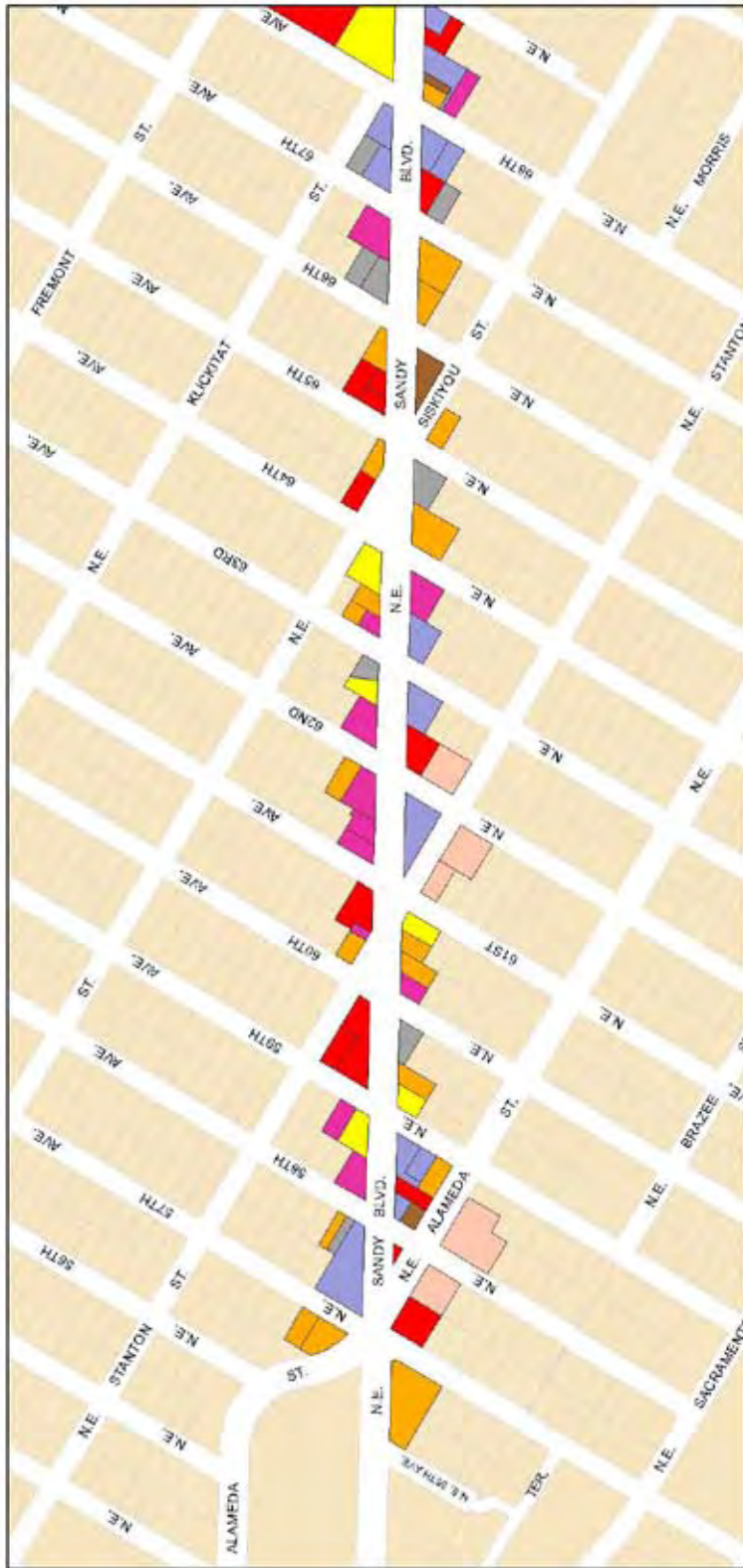


Figure 4:
Land Use Map – South Section

- Retail Trade
- Personal Services
- Leisure & Hospitality
- Office
- Institutional
- Residential
- Industrial
- Vacant Building
- Vacant Residential
- Vacant Lot



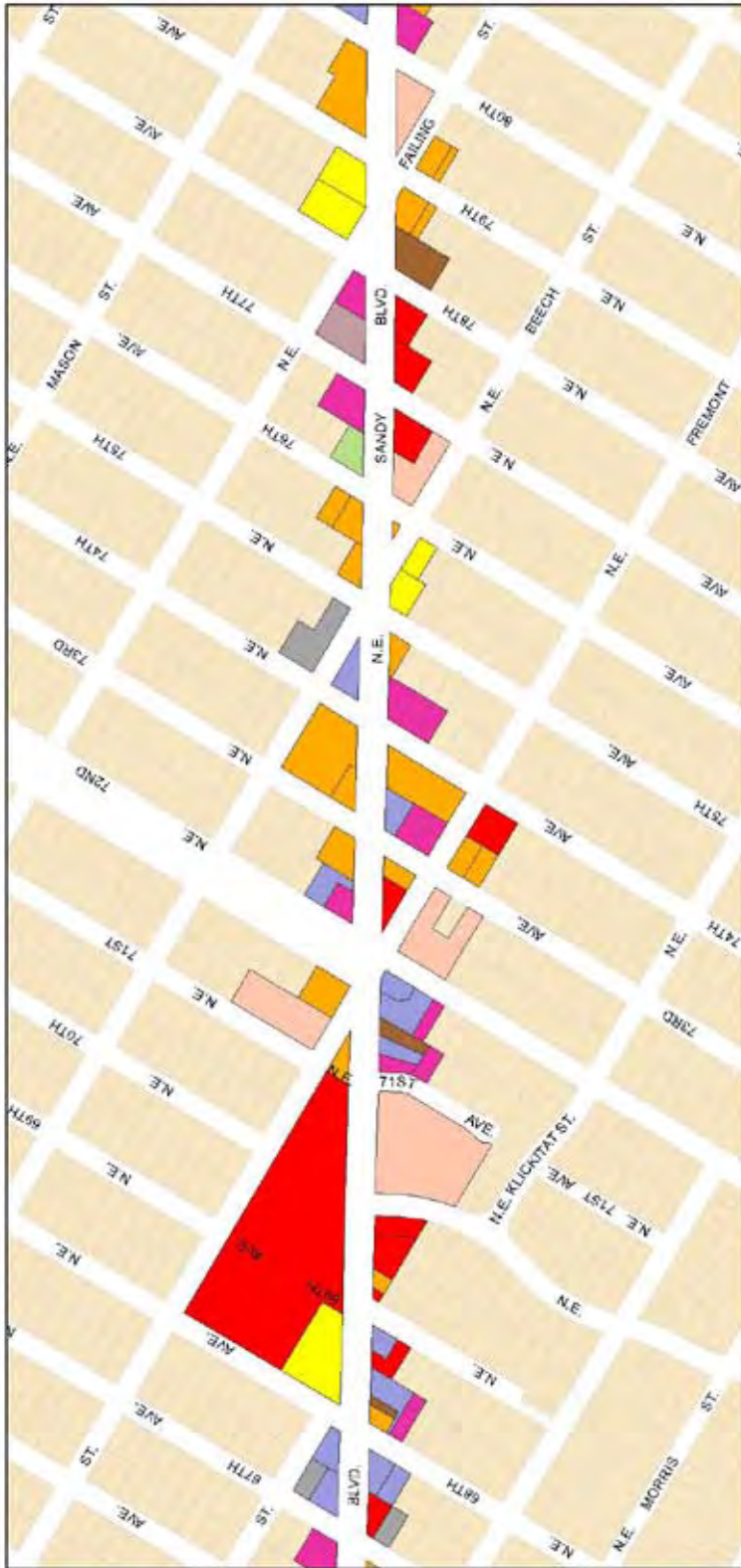


Figure 4:
Land Use Map – Mid Section

-  Retail Trade
-  Personal Services
-  Leisure & Hospitality
-  Office
-  Institutional
-  Residential
-  Industrial
-  Vacant Building
-  Vacant Residential
-  Vacant Lot



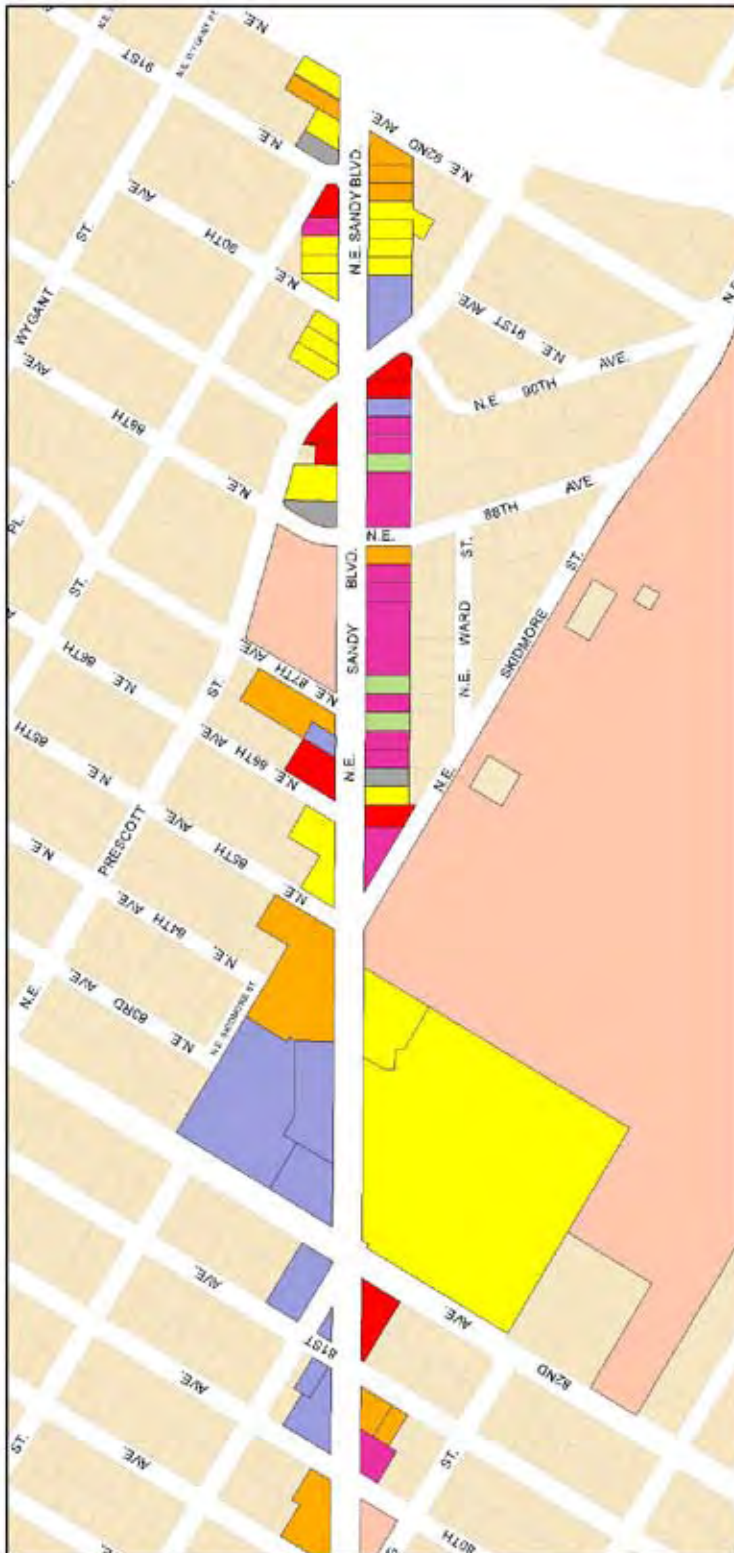


Figure 4:
Land Use Map – North Section

- Retail Trade
- Personal Services
- Leisure & Hospitality
- Office
- Institutional
- Residential
- Industrial
- Vacant Building
- Vacant Residential
- Vacant Lot



Table 2 provides a summary of land uses within the Sandy Corridor. The employment uses are categorized by six general uses, including Retail Trade, Leisure and Hospitality, Personal Services, Office, Institutional and Industrial, with more detailed uses within each of these broad categories. The table also includes building square footage to illustrate the use and/or availability of space for each category.

Since the size of tax lots in commercial areas can vary significantly, comparing the total building square footage occupied by different uses is a more effective way to gauge the overall physical and economic character of a corridor. Predominant uses along the Corridor include Personal Services and Office uses, which occupy 29 percent and 23 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
EMPLOYMENT USES					
Retail Trade		36	13%	138,415	10%
Motor Vehicle Dealers	4411-2	2	1%	8,929	1%
Food and Beverage Stores	445	11	4%	37,079	3%
All Other Retail Trade	*	23	8%	92,407	7%
Leisure and Hospitality		31	24%	128,054	9%
Restaurants and Bars	722	26	22%	65,178	5%
Lodging	721	3	1%	61,479	5%
Arts, Entertainment and Recreation	711-3	2	0%	1,397	0%
Personal Services		37	15%	386,951	29%
Automotive Repair and Maintenance	8111	14	8%	42,959	3%
Personal Care and Laundry Facilities		20	7%	337,359	25%
Other Repair and Maintenance	8113-4	3	0%	6,633	0%
Office		88	11%	306,156	23%
Medical and Dental Offices	622-3	30	3%	104,453	8%
Professional and Business Services	541, 551, 561	29	2%	116,602	9%
Financial Activities	521-5, 531-3	26	7%	73,089	5%
Information	511-2, 515-9	1	0%	0	0%
Government	921-8	2	0%	12,012	1%
Institutional		20	7%	133,581	10%
Religious, Community and Social Service Institutions	813, 624	15	5%	115,732	6%
Schools and Colleges	611	5	2%	17,849	1%
Medical Centers and Residential Care Facilities	622-3	0	0%	0	0%
Industrial ¹	**	20	7%	64,182	5%
Total Employment Uses		232	82%	1,157,339	86%
NON-EMPLOYMENT USES					
Open Space		0	0%	0	0%
Residential ²		21	7%	90,340	7%
Vacant Residential		2	1%	4,428	0%
Vacant Building or Storefront ³		23	8%	87,737	7%
Vacant Land ⁴		4	1%	8,862	1%
Total Non-Employment Uses		50	18%	191,367	14%
Total Uses		282	100%	1,348,706	100%

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

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

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

²Four are zoned single or multi-family residential and 16 are zoned commercial

³Ten are zoned single family residential and 13 are zoned commercial.

⁴One is zoned single family residential and three are zoned commercial.

Findings:

- Of the 282 tax lots along the Corridor, employment uses constitute 86 percent whereas non-employment uses constitute just 14 percent.
- Office development, including medical and dental offices and firms specializing in professional, business and financial services, is the predominant land use along the Corridor, accounting for an estimated 31 percent of total uses. The majority of existing office users are small businesses, including a variety of minority-owned businesses such as insurance brokers, investment advisors and law offices that target the Vietnamese immigrant community.
- In addition to office uses, Retail Trade and Personal Services businesses, each of which comprises 13 percent of total land uses along the Corridor, feature prominently.
- Twenty six restaurants, including more than 10 Asian restaurants and eateries, are located along the Corridor.
- Potential for redevelopment exists based on 23 building and storefront vacancies with 87,737 square feet of space available for retail/commercial uses. Vacant land is scarce along the Corridor, which features four vacant lots totaling less than a quarter of an acre.

INDUSTRY MIX

Table 3 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 7 provide more detail for four of the main industry sectors (Other Services, Retail Trade, Health Care and Social Assistance, and Accommodation and Food Services) along the Corridor using three-, four- and five-digit NAICS codes. Similar to the land use survey, the business composition analysis reveals that most Corridor businesses specialize in services, including, but not limited to, personal care services, hair, nail and skin care services, automotive repair and service, and other commercial services.

Table 3: Business Composition by Industry

NAICS Industry Sector	NAICS Codes	Number of Businesses	Percent of Total Uses
Construction	23	7	3%
Manufacturing	32-33	5	2%
Wholesale Trade	42	5	2%
Retail Trade	44-45	36	16%
Transportation and Warehousing	48-49	3	1%
Information	51	2	1%
Finance and Insurance	52	17	7%
Real Estate Rental and Leasing	53	9	4%
Professional, Scientific, and Technical Services	54	16	7%
Administrative/Support Services	56	13	6%
Educational Services	61	5	2%
Health Care and Social Assistance	62	32	14%
Arts Entertainment and Recreation	71	2	1%
Accommodation and Food Services	72	28	12%
Other Services	81	50	22%
Public Administration	92	1	0%
Total Businesses	-	231	100.0%

Source: Portland Bureau of Planning 2006 Business Owner Survey

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

Table 4: Other Service Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
All Other Personal Services	81299	2	4%
Automotive Body, Paint, Interior and Glass Repair	81112	3	6%
Automotive Mechanical and Electrical Repair and Maintenance	81111	11	22%
Civic and Social Organizations	81341	4	8%
Drycleaning and Laundry Services	81232	3	6%
Hair, Nail and Skin Care Services	81211	9	18%
Home & Garden Equipment & Appliance Repair & Maint.	81141	1	2%
Other Personal and Household Good Repair and Maintenance	81149	2	4%
Other Personal Care Services	81219	4	8%
Personal Care Services	81211	1	2%
Pet Care Services	81291	1	2%
Religious Organizations	81311	8	16%
Social Advocacy Organizations	81331	1	2%
Total		50	100%

Source: Portland Bureau of Planning 2006 Business Owner Survey

Findings:

- Businesses specializing in Automotive Mechanical and Electrical Repair and Maintenance and Hair, Nail and Skin Care Services are well represented along the Corridor, accounting for a combined 40 percent of businesses in the “Other Services” industry sub sector.
- The Corridor is home to eight religious organizations representing broad mix of cultures and faiths. The presence of these organizations, including the Grotto, Church of the Nazarene and the Cultural Center for Tibetan Buddhism, attracts people of diverse nationalities and religious beliefs to the Corridor.



“Other Services” businesses include hair and nail salons.

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

Table 5: Retail Trade Businesses by 5-Digit NAICS

3-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Clothing and Clothing Accessories Stores	448	5	14%
Electronics and Appliance Stores	443	2	6%
Food and Beverage Stores	445	11	31%
Furniture and Home Furnishing Stores	442	2	6%
Gasoline Stations	447	1	3%
Health and Personal Care Stores	446	2	6%
Miscellaneous Store Retailers	453	4	11%
Motor Vehicle and Parts Dealers	441	6	17%
Sporting Goods, Hobby, Book and Music Stores	451	3	8%
Total		36	100%

Findings:

- Food and Beverage Stores constitute 31 percent of Retail Trade businesses along the Corridor. Two Asian markets, Thanh Thao Market and Nam Phong Market, a recently remodeled Safeway at the intersection of 70th and Sandy, several convenience stores and the Rose City Liquor Store are examples of the Corridor’s diverse mix of Food and Beverage retailers.
- Six Motor Vehicle and Parts Dealers, including Irwin’s Western Automotive and Northwest Auto Accessories, and five Clothing and Clothing Accessories Stores, including two jewelers and Ed’s House of Gems, are located on the Corridor. Together, businesses in these industry sub sectors account for 31 percent of Retail Trade businesses on the Corridor.



Sandy Blvd. hosts a variety of Asian businesses, creating a market niche comparable to 82nd Avenue

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

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

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Drinking Places	72241	6	21%
Full Service Restaurants	72211	15	54%
Hotels and Motels	72111	2	7%
Limited Service Eating Places	72221	5	18%
Total		28	100%

Source: Portland Bureau of Planning 2006 Business Owner Survey

Findings:

- Full Service Restaurants and Limited Service Eating Places (i.e. fast food) comprise 72 percent of the Corridor's Accommodation and Food Service employers (20 businesses). An assortment of Asian restaurants and cafes, including Cha Ba Thai, Sam Ho Seafood Restaurant, Thieng Hong and Yen Ha, as well as three fast food franchises, Subway, Pizza Hut and Jack in the Box, are located on the Corridor.
- Six bars, including Pirate's Cove, the Driftwood Tavern and Dotty's, a retail franchise with an assortment of video poker and lottery games, are located on the Corridor. The bars are generally concentrated in the eastern half of the Corridor. Three are located close to the intersection of 82nd Avenue, which has a higher incidence of reported crime than other parts of the Corridor.

Table 7 below shows the distribution of businesses in the Health Care and Social Assistance sector by 5-Digit NAICS classification.

Table 7: Health Care and Social Assistance Businesses by 5-Digit NAICS

5-Digit NAICS Industry Sub Sector	NAICS Code	Number	Percent
Child Day Care Services	6244	1	3%
Home Health Care Services	6216	1	3%
Individual and Family Services	6241	1	3%
Medical and Diagnostic Laboratories	3215	1	3%
Offices of Dentists	6212	12	38%
Offices of Other Health Practitioners	6213	11	34%
Offices of Physicians	6211	5	16%
Total		32	100%

Source: Portland Bureau of Planning 2006 Business Owner Survey

Findings:

- Dentist's offices comprise 38 percent of businesses in the Health Care and Social Assistance industry sector.
- In addition to dentists, several physicians and health practitioners specializing in internal medicine, chiropractics, oriental medicine and related specialties also have offices along the Corridor.

Demographics

This section is designed to provide a technical examination of the conditions that impact the market demand for the Sandy 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: ESRI Business Analyst and Portland Bureau of Planning.

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

POPULATION AND HOUSING TRENDS

Household and Employment Characteristics

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

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

Table 8: Household Estimates and Forecasts

	2005 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	8,157	8,847	8%
Community Trade Area	58,165	65,137	12%
Portland	235,180	299,355	27%

Source: Metro

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

Table 9: Employment Estimates and Forecasts¹

	2005 Household Estimate	2030 Household Projection	Projected Growth
Neighborhood Trade Area	4,425	7,530	70%
Community Trade Area	76,583	108,148	41%
Portland	437,297	599,997	37%

Source: Metro

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

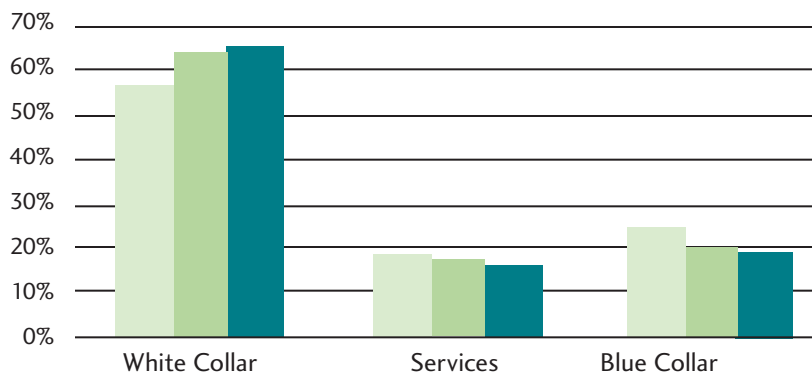
Findings:

- The neighborhood and community trade areas are projected to experience significantly lower population growth than the City between 2005 and 2030.
- However, with a projected growth rate of 70 percent, the neighborhood trade area is anticipated 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 56 percent, the majority of workers in the neighborhood trade area are white collar workers. Accordingly, businesses that offer a broad mix of goods and services consumed by white collar professionals are likely to thrive in the neighborhood trade area. In addition, given that an estimated 44 percent of neighborhood residents are services and blue collar workers, a discount store or used merchandise store seeking to locate in Portland might consider the Sandy Corridor neighborhood trade area a good location. However, businesses such as gourmet grocers and boutique clothing stores that cater almost exclusively to college-educated, white collar professionals are likely to locate in a more affluent neighborhood than Sandy Boulevard.

Figure 6: 2005 Employed Population 16+ by Occupation



	White Collar	Services	Blue Collar
Neighborhood Trade Area	56%	19%	25%
Community Trade Area	64%	17%	20%
Portland	65%	16%	19%

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

Findings:

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

Housing Units and Homeownership

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

Table 10: Housing Characteristics

	Neighborhood Trade Area			Community Trade Area			Portland		
	2000	2006	2011	2000	2006	2011	2000	2006	2011
Total Housing Units	7,934	8,037	8,294	54,750	56,259	58,230	237,307	251,205	262,727
Occupancy Rate	93%	92%	91%	95%	94%	93%	94.3%	92.4%	91.5%
Vacancy Rate	6%	8%	9%	5%	7%	7%	6%	8%	9%
Homeownership Rate	72%	73%	73%	64%	66%	66%	56%	57%	57%
Median Home Value	\$137,933	\$221,127	\$285,792	\$156,628	\$192,401	\$251,468	\$154,721	\$247,441	\$325,519

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.
- In the neighborhood trade area, the community trade area, and the City of Portland, the homeownership rate is expected to remain consistent between 2006 and 2011.

Age

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

Table 11 shows the age distribution of the neighborhood and community trade area and City populations as reported in the 2000 Census. It also shows the estimated and projected age distributions for 2006 and 2011.

Table 11: Population By Age

Age Group	Neighborhood Trade Area			Community Trade Area			Portland		
	2000	2006	2011	2000	2006	2011	2000	2006	2011
0 - 19	26%	26%	25%	24%	24%	23%	24%	23%	22%
20 - 34	23%	22%	21%	24%	22%	22%	26%	24%	23%
35 - 64	40%	43%	44%	40%	43%	44%	39%	42%	42%
65+	11%	10%	10%	12%	11%	12%	12%	11%	11%
Median Age	35.4	36.8	37.9	36.2	37.7	39.0	35.2	36.7	38.0

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

Findings:

- In 2000, the neighborhood trade area had a slightly higher percentage of young people (ages 0 – 19) than the community trade area and the Citywide population. This trend is projected to continue through 2011.
- In general, however, the neighborhood and community trade area and City populations have a similar age distribution and median age.
- Between 2000 and 2011, the median age in all three geographies is projected to increase by more than two years, with the largest increase projected to occur in the community trade area.

Household Income

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

Table 12 shows the estimated distribution of total households by household income in 2006 for the Neighborhood and Community Trade Areas and the City of Portland.

Table 12: Total Households by Household Income

ESRI 2005 Estimate	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Household Income Base	7,400	100%	52,631	100%	232,188	100%
< \$15,000	667	9%	4,795	9%	29,486	13%
\$15,000 - \$24,999	733	10%	4,619	9%	22,848	10%
\$25,000 - \$34,999	759	10%	5,537	11%	24,893	11%
\$35,000 - \$49,999	1,230	17%	8,493	16%	38,316	17%
\$50,000 - \$74,999	1,739	24%	11,714	22%	46,944	20%
\$75,000 - \$99,999	1,090	15%	7,727	16%	29,329	13%
\$100,000 - \$149,999	892	12%	6,406	12%	24,399	11%
\$150,000 - \$199,999	186	3%	2,042	4%	8,403	4%
\$200,000+	104	1%	1,299	2%	7,570	3%
Median Household Income	\$54,605		\$55,650		\$60,400	
Average Household Income	\$63,185		\$68,954		\$82,293	
Per Capita Income	\$24,971		\$28,077		\$35,371	

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

Findings:

- In 2006, the neighborhood and community trade areas had more middle-class households earning \$35,000 to \$99,999 than the City of Portland.
- At 19 percent and 18 percent, the percentage of low-income households in the neighborhood and community trade areas earning less than \$25,000 was slightly lower than the Citywide share of low-income households (23 percent).
- The neighborhood trade area, had a smaller percentage of upper-income households earning over \$150,000 (4 percent) compared to the community trade area (6 percent) and the City of Portland (7 percent). Since housing is more affordable in the neighborhood trade area, it is not surprising that fewer upper-income households live there.

Education

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

Table 12: Educational Attainment, 2000

Educational Attainment	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total	12,719	100%	89,544	100%	363,851	100%
Less than 9th Grade	789	6%	4,567	5%	18,744	5%
9th - 12th Grade, No Diploma	1,374	11%	7,790	9%	33,382	9%
High School Graduate	3,396	27%	20,058	22%	80,947	22%
Some College, No Degree	3,460	27%	23,102	26%	90,825	25%
Associate Degree	712	6%	5,462	6%	21,255	6%
Bachelor's Degree	2,086	16%	18,894	21%	77,321	21%
Master's/Professional/Doctorate	890	7%	9,671	11%	41,377	11%

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

Findings:

- The neighborhood trade area has a higher percentage of the population over age 25 who have not earned a high school diploma (17 percent) than both the community trade area (14 percent) and the City of Portland (14 percent).
- Advanced degrees are far less common in the neighborhood trade area, where 7 percent of residents have earned a Master's, Professional, or Doctorate Degree, compared with 11 percent of the Community Trade Area population and 11 percent of the Portland population.
- Only 23 percent of the neighborhood population earned a Bachelor's Degree or higher, compared to 32 percent of the community trade area and 32 percent of the Citywide population.

Race and Ethnicity

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

Table 13: Race and Ethnicity, 2006

Race or Ethnicity	Neighborhood Trade Area		Community Trade Area		Portland	
	Number	Percent	Number	Percent	Number	Percent
Total Population	18,798	100%	131,616	100%	549,135	100%
White Alone	13,389	71.2%	97,895	74.4%	412,951	75.2%
Black or African American Alone	845	4.5%	8,413	6.4%	37,846	6.9%
American Indian or Alaska Native Alone	180	1%	1,146	0.9%	5,620	1%
Asian Alone	2,141	11.4%	12,031	9.1%	41,476	7.6%
Pacific Islander Alone	79	0.4%	506	0.4%	2,227	0.4%
Some Other Race Alone	1,404	7.5%	6,131	4.7%	24,866	4.5%
Two or More Races	760	4%	5,494	4.2%	24,149	4.4%
Total Hispanic/Latino Origin	2,165	11.5%	11,232	8.5%	48,054	8.8%

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

Findings:

- The neighborhood trade area population is largely White (71 percent). However, it boasts a growing Asian and Pacific Islander population (11.8 percent).
- Both the neighborhood and the community trade areas have a higher proportion of Asian and Pacific Islanders than the City as a whole.
- The neighborhood trade area also has a higher percentage of the population that are of Hispanic/Latino origin (11.5%) than the community trade area (8.5%) and the City (8.8%).

Business Environment

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

BUSINESS AND CUSTOMER PERCEPTIONS

As shown in Table 14, the majority of business owners surveyed along the Corridor felt cleanliness, safety, and the appearance of buildings were the most important factors for the health and vitality of the corridor. 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 30 percent desiring storefront improvements and 21 percent desiring interior improvements (See Figures 7 and 8). A storefront enhancement program could be an option to help encourage revitalization of the Corridor.



Examples of buildings that could benefit from improvements to their buildings to attract more customers.

Figure 7: Businesses that Desire Storefront Improvements

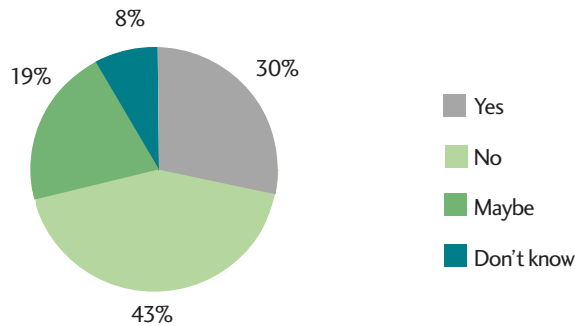
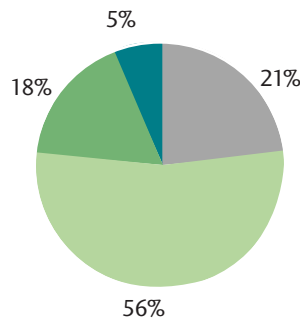


Figure 8: Businesses that Desire Interior Improvements



CRIME STATISTICS

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

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

³Calls for service includes two types of calls, dispatched calls and self-initiated calls, and do not necessarily result in an arrest. Dispatched calls refer to 9-1-1 calls that have come into the Bureau of Emergency Communications (BOEC) and for which an officer is dispatched to that incident. Self-initiated calls occur when an officer witnesses an incident while on patrol and responds (or someone stops the officer on the street and reports a problem).

Table 15: Total Crimes and Calls for Service

82nd Avenue								Portland						
	2000	2001	2002	2003	2004	2005	% change 2000-05	2000	2001	2002	2003	2004	2005	% change 2000-05
CRIMES														
CRIMES AGAINST PERSONS														
Murder	1	0	1	2	2	0	---	18	22	20	28	29	22	22%
Rape	17	11	18	11	12	15	-12%	369	305	354	310	313	325	-12%
Robbery	54	49	46	37	58	67	24%	1,455	1,272	1,296	1,375	1,291	1,139	-22%
Aggravated assault	100	84	88	83	86	79	-21%	3,864	2,963	2,844	2,732	2,405	2,376	-39%
Total Person Crimes	172	144	153	133	158	161	-6%	5,706	4,562	4,514	4,445	4,038	3,862	-32%
CRIMES AGAINST PROPERTY														
Burglary	213	202	181	266	394	273	28%	5,601	5,615	5,731	6,507	7,259	6,142	10%
Larceny	798	938	744	1,010	907	753	-6%	25,063	28,457	28,052	29,748	28,452	25,941	4%
Motor vehicle theft	185	188	200	293	294	275	49%	4,782	4,765	5,255	5,982	6,052	5,834	22%
Arson	15	6	6	18	14	5	-67%	510	385	496	384	363	375	-26%
Total Property Crimes	1,211	1,334	1,131	1,587	1,609	1,306	8%	35,956	39,222	39,534	42,621	42,126	38,292	6%
Total Crimes	1,383	1,478	1,284	1,720	1,767	1,467	6%	41,662	43,784	44,048	47,066	46,164	42,154	1%
CALLS FOR SERVICE														
Dispatched	11,716	12,996	13,726	15,032	15,506	15,506	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%
Total Calls for Service	18,161	19,388	21,498	22,919	23,019	23,172	28%	433,551	420,224	434,126	454,854	432,930	434,196	0%

Source: Portland Police Bureau, SQL Program 1/03/07.

Neighborhood Trade Area totals calculated using census tracts 29.01, 29.02, 28.01, 28.02, 29.03, and 77.

Findings:

- Total crimes on Sandy Boulevard peaked in 2004 (1,767 crimes) whereas total crimes Citywide peaked in 2003 (47,066 crimes).
- Between 2000 and 2005, crimes against persons on Sandy Boulevard decreased by 6 percent overall, significantly less than the 32 percent decrease Citywide. While the City experienced a steady decline in crimes against persons, annual reported crimes on Sandy Boulevard did not follow a consistent up or down trend. Crimes against persons on Sandy Boulevard increased by 21 percent between 2003 and 2005, in stark contrast to the City, where crimes against persons decreased by 13 percent during the same time.
- Total property crimes on Sandy Boulevard peaked in 2004 (1,609 crimes). In 2003, the number of property crimes reported on Sandy (1,587 crimes) was 40 percent higher than the previous year (1,131 crimes).
- Increased calls for service on Sandy Boulevard may be attributable, in part, to the high concentration of commercial activity and high traffic volumes on 82nd Avenue and other major transportation corridors that intersect the Corridor. The recent completion of a large affordable housing project at the intersection of 82nd

Avenue and Sandy Boulevard, where the highest concentration of calls for service occurred in 2005 (see Appendix D), may have contributed to the increase in calls for service.

- In 2005, Sandy Boulevard witnessed a significant drop in total annual crimes, particularly in property crimes, which decreased by 19 percent. Within the property crime subgroup, there was a marked reduction in burglary and larceny, which decreased by 31 percent and 17 percent over 2004 figures.

Corridor Performance

Retail Gap Analysis

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

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

To identify the purchasing power of households within the Sandy 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.



Ohana's Restaurant is a relatively new Hawaiian dining option that is capturing "Away from home" sales

NEIGHBORHOOD TRADE AREA GAP ANALYSIS

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

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

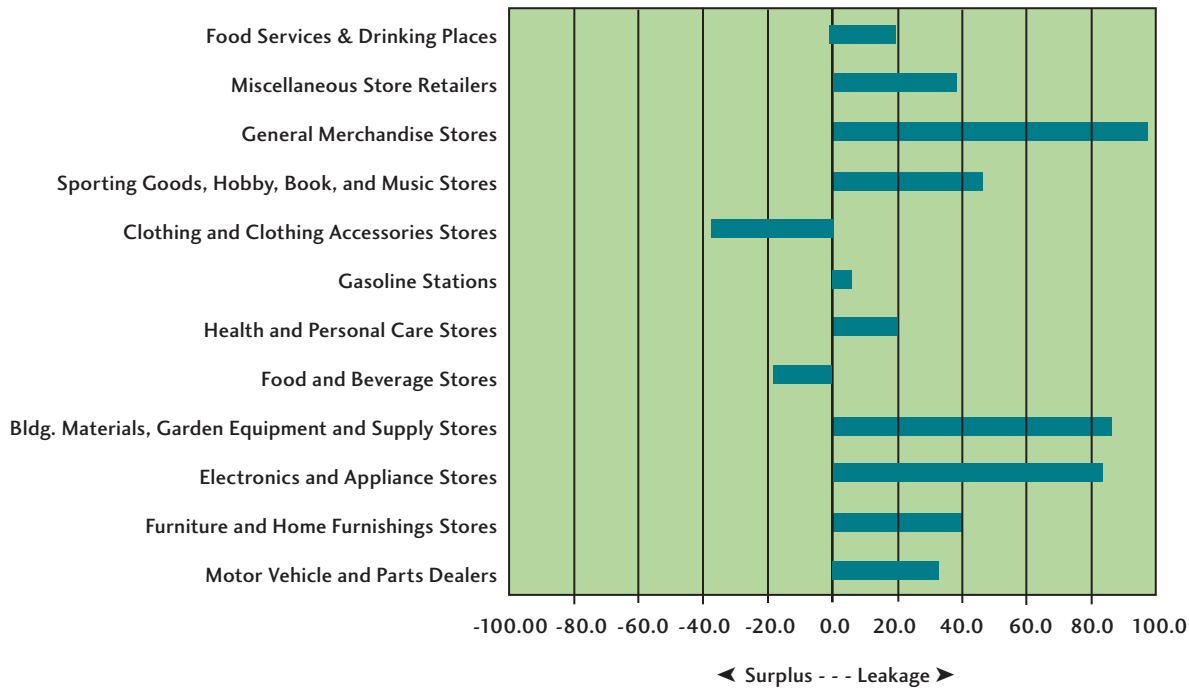
Table 16: Retail Trade and Food & Drink Industry Summary

Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Leakage (+)/ Surplus (-) (\$)	Leakage (+)/ Surplus (-) Factor ¹
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$ 115,696,332	\$ 181,492,774	\$ 65,796,442	22.1
Total Retail Trade (NAICS 44-45)	\$ 96,510,552	\$ 152,750,718	\$ 56,240,166	22.6
Total Food & Drink (NAICS 722)	\$ 19,185,780	\$ 28,742,056	\$ 9,556,276	19.9

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

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

Figure 10: Leakage/Surplus Factor by Industry Subsector



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

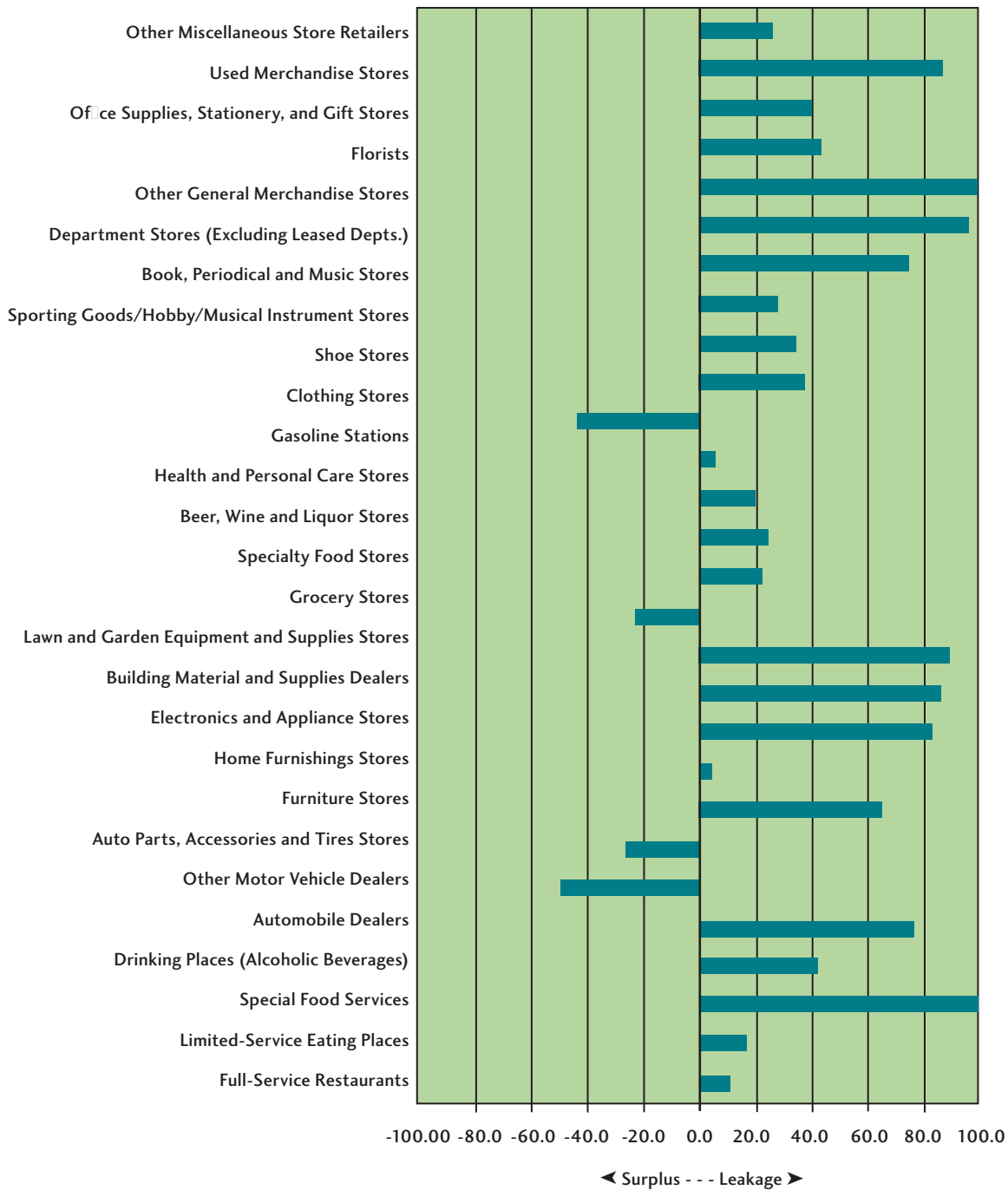
Findings:

- Retail sales leakage of \$65,796,442 is reported within the broad Retail Trade and Food and Drink categories.
- Significant retail leakage, spread across many industry sub sectors, suggests that the demand for some neighborhood goods and services is not met being met locally. Accordingly, the opportunity exists for current and future businesses along the Sandy Corridor to meet the underserved market by providing goods and services that residents currently shop for outside of the neighborhood trade area.
- Eighty-five percent of business owners in the Sandy Corridor that completed the Bureau of Planning’s Business Owner Survey reported that business has either improved or stayed the same over the past five years. Given that the neighborhood as a whole has experienced notable retail leakage, it is possible that some businesses – particularly those that target the Asian community or specialize in ethnic goods and services not widely available throughout the City – have a strong customer base living outside the neighborhood trade area.
- Fifteen percent of Corridor business owners that responded to the Business Owner Survey reported a decline in business. Increasing competition and the economy were the prime reasons cited for the decline. In contrast, however, several survey respondents attributed their increase in business to the economy.
- Two industry sub sectors, Clothing and Clothing Accessories Stores and Food and Beverages, generated a retail surplus of approximately \$31 million.

Figure 10 provides a more detailed analysis of leakage/surplus by industry group. The industry groups are a subset of the broader industry sub sectors. For example, the Food Services and Drinking Places sub sector is composed of four industry groups – Drinking Places, Special Food Services, Limited Service Eating Places and Full Service

Restaurants. Examining leakage/surplus patterns by industry group gives local businesses, residents and prospective investors a clearer picture of the types of businesses that are thriving and underrepresented.

Figure 11: Leakage/Surplus Factor by Industry Group



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

Findings:

- The demand for neighborhood retail is not being met by existing businesses in many industry groups.
- There is market potential for Office Supplies, Stationary and Gift Stores, Book, Periodical and Music Stores, Florists, Beer, Wine & Liquor Stores, Specialty Food Services, Drinking Places, and Special Food Services businesses within the neighborhood trade area.
- Other retail potential exists; however, this potential exists for businesses not typically classified as neighborhood retailers (e.g. Building Materials and Supplies Dealers, Lawn and Garden Equipment and Supplies Dealers, Electronics and Appliance Stores, and Sporting Goods/Hobby/Book/Music Stores). These businesses generally serve larger trade areas and are therefore discussed in the community trade area findings.
- The results of the business owner surveys generally support the findings of the neighborhood gap analysis. When asked to identify businesses that would complement their business, 36 percent of business owners indicated a coffee/sandwich shop, 26 percent a bookstore, 17 percent a fresh food market, and 15 percent said a specialty food store. A detailed description of retail leakage/surplus by NAICS industry classifications can be found in Appendix H.

COMMUNITY TRADE AREA GAP ANALYSIS

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

Table 17: Retail Trade and Food & Drink Industry Summary

Industry Summary	Supply (Retail Sales)	Demand (Retail Potential)	Leakage (+)/ Surplus (-) (\$)	Leakage (+)/ Surplus (-) ¹ Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$ 1,517,729,984	\$ 1,400,461,978	-\$117,268,006	-4.0	1,658
Total Retail Trade (NAICS 44-45)	\$ 1,249,929,846	\$ 1,178,077,343	-\$71,852,503	-3.0	1,163
Total Food & Drink (NAICS 722)	\$ 267,800,13	\$ 222,384,635	-\$45,415,503	-9.3	495

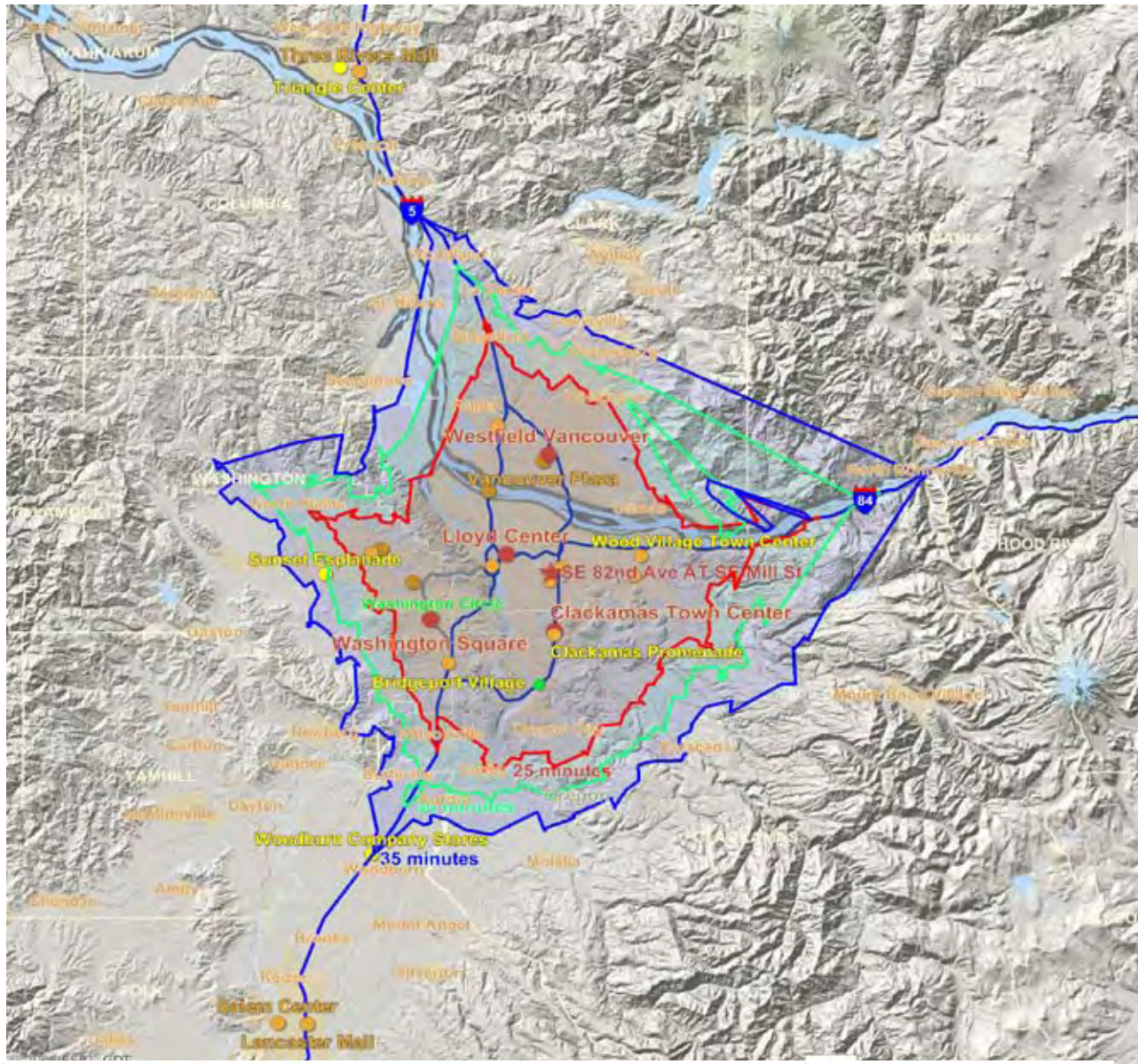
Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, all rights reserved. ESRI estimates for 2005.

Findings:

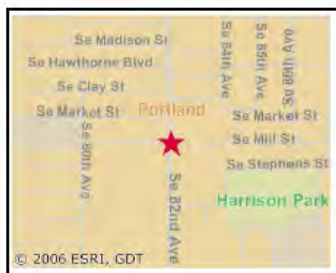
- No retail sales leakage is reported within the Retail Trade and Food and Drink industries (NAICS 44-45, 722), which generated an overall surplus of \$117,268,066 in 2005. This suggests that the community trade area, which has nearly seven times the number of households as the neighborhood trade area and contains an estimated 25 percent of the citywide population, is, overall, a stable retail marketplace.
- Unlike the neighborhood trade area, the community trade area features several large format retailers, including but not limited to Home Depot, Circuit City, Bed, Bath & Beyond and WinCo Foods. Most large format retailers are national and regional chains that offer a wider selection of retail goods than neighborhood retailers at a lower cost. For this reason, they have significantly larger trade areas comprised of multiple neighborhoods and municipalities.

A map of major shopping centers within the Portland Metro region that may compete with the Corridor for customers is shown in Figure 11. All of the shopping centers are within a 35-minute drive-time of the center point of the 82nd Avenue Corridor.

Figure 11: Major Shopping Centers in the Portland Metro Region



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



Major Shopping Centers by Gross Leasable Area

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

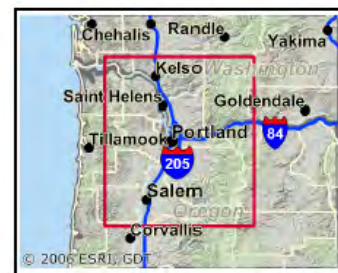
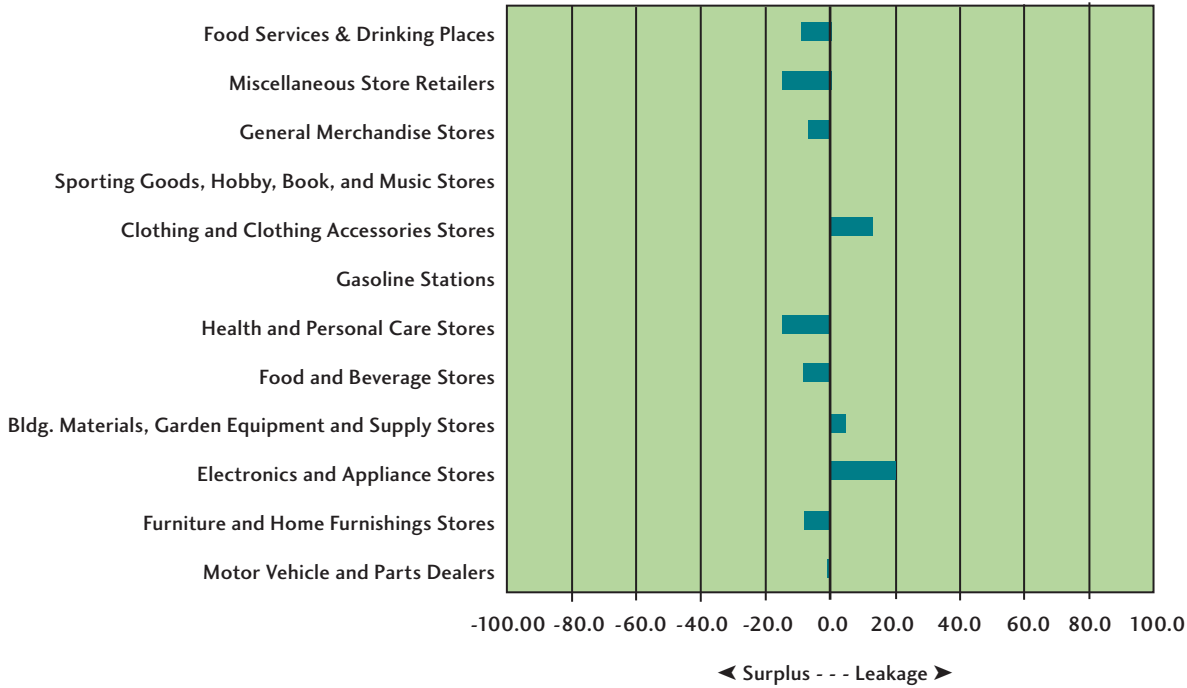


Figure 12 shows retail leakage/surplus by industry sub sector. Figure 13 shows retail leakage/surplus by more detailed industry groups.

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

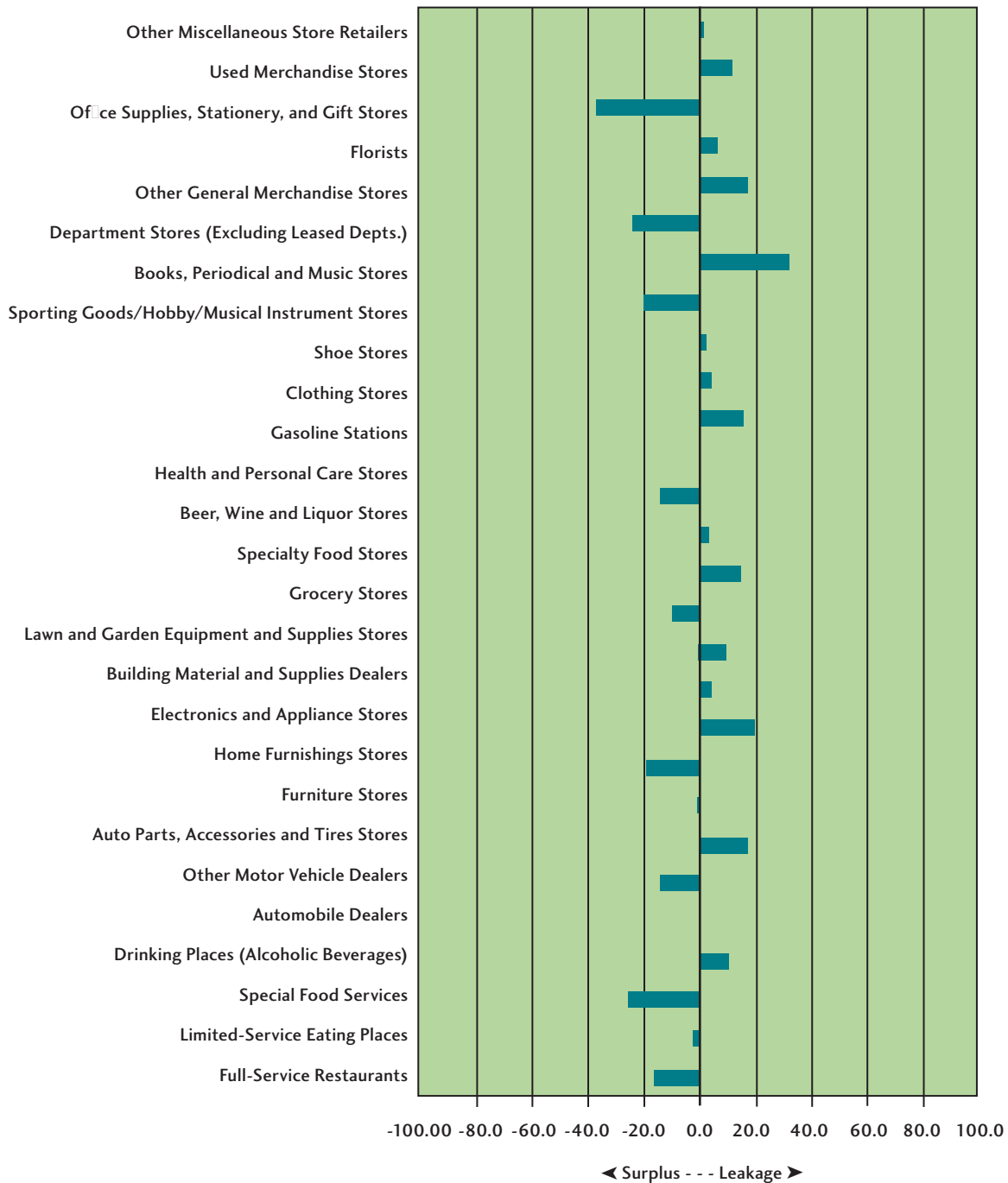


Source: Business data provided by InfoUSA, Omaha NE, copyright 2005, All rights reserved. ESRI estimates for 2005.

Findings:

- In 2005, the Food Services and Drinking Places, Miscellaneous Store Retailers, General Merchandise Stores, Health and Personal Care, Food and Beverage Stores, and Furniture and Home Furnishings Stores industry sub sectors outperformed other sub sectors in the community trade area. These sub sectors generated a \$138,349,739 retail surplus.
- The Motor Vehicles and Parts Dealers sub sector also contributed to the surplus, although to a lesser degree than other sub sectors. As a whole, the community trade area outperformed the neighborhood trade area, where only two sub sectors (Clothing & Accessories and Food & Beverage Stores) generated a retail surplus in 2005. However, the community trade area’s greater capacity to serve the local market is not surprising considering the occurrence of retail leakage in almost every sub sector within the Sandy Boulevard Neighborhood Trade Area.
- While most industry sub sectors in the community trade area generated a retail surplus, two sub sectors – Electronic & Appliance Stores and Clothing and Clothing Accessories Stores – experienced retail leakage. Accordingly, the area may be able to support new (or existing) businesses within these sub sectors.

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



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

Findings:

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

Competitive Strengths and Weaknesses

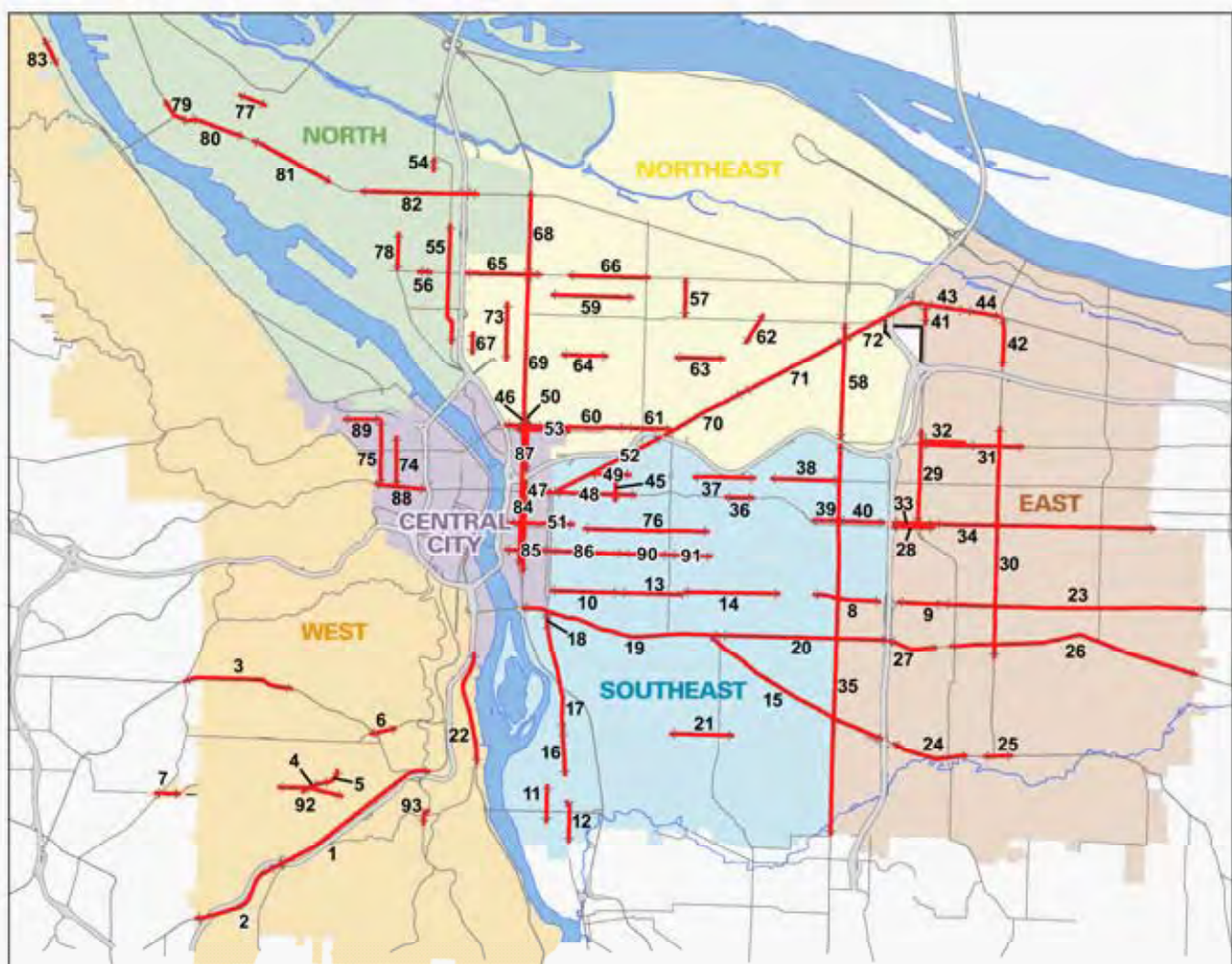
In addition to analyzing retail leakage, the overall performance of the Corridor was assessed in Figure 14 by identifying internal strengths and weaknesses as well as external market opportunities and threats (a conventional SWOT analysis).

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

INTERNAL	Strengths <ul style="list-style-type: none"> • Vietnamese marketplace/niche market • Redevelopment potential • Variety of small businesses • Library branch • The Grotto - green space • Small offices • Start-up and home-based businesses • Low setbacks, multi-story and mixed-use developments • Small, minority-owned businesses • Affordable • Active business association • Synergy with Fremont • Historic corridor with older buildings/architecture 	Weaknesses <ul style="list-style-type: none"> • Upper stories of many buildings are not used or are underutilized (storage, etc.) • Auto-oriented, but with pedestrian potential • Unattractive storefronts • No “center,” lacking open and green space • Many diverse businesses, but not all thriving • Transportation issues (pedestrian crossings) • No street trees • Aesthetically unappealing • Fast moving traffic • Vacant storefronts • Lack of gas stations • Limited grocery options • Possible lack of family wage jobs • Diagonal cross streets • Crime • Perception of “seediness”
	Opportunities <ul style="list-style-type: none"> • Population and income growth • Has potential to become more of a community serving corridor • Proximity to other corridors and within a reasonable distance of major roadways, including I-84 • Mixed-use redevelopment • Marketing, branding • Create a place (green) • Proximity to thriving neighborhoods, such as Hollywood • Nodal development 	Threats <ul style="list-style-type: none"> • Negative externalities from 82nd Ave • Infrastructure projects currently underway • Perception of disproportionate low-income population • State highway designation • Street network of surrounding neighborhoods • Confusing intersections/ transportation • Lacks direct freeway access, which discourages some businesses from locating there
EXTERNAL		

Appendix A:

CITY OF PORTLAND 93 CORRIDORS MAP



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

Appendix B:

CITY OF PORTLAND 93 CORRIDORS MAP

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

Date _____

Name of Business _____

Name of Business Owner _____

Business Address _____

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

How long have you been in business? _____

1. Do you rent or own the business facility?
2. If you rent, what is your monthly rent? _____
3. What is the size of the business (in square feet)? _____
4. Hours of Operation (Please complete as appropriate.)

Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

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

10. What is/are the busiest sales time(s) of the day?9-11 am 11 am-1 pm 1-3 pm 3-5 pm 5-7 pm Other _____**11. What are the THREE busiest sales months of the year?**January February March April May June July August
September October November December **12. When do you typically plan major sales/specials for your business? (Check all that apply).**January February March April May June July August
September October November December **13. Of the characteristics listed, which do you feel are the most important for the health and vitality of your corridor (business district)?****Criteria - check all that apply**

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

14. How satisfied are you with your present location?Very Satisfied Satisfied Neutral Unsatisfied Very Unsatisfied Plan to Move **15. Do you have plans to expand, reduce or relocate this business in the foreseeable future?** Expand Reduce
 Relocate: Within Portland Outside of Portland Other _____
 None of the above**15a. If you have plans to expand, reduce or relocate, have you encountered any barriers?** Yes: Employment Financing Regulatory Structural Zoning Other _____
 No**16. Over the past five years has your business:**Improved Stayed the same Declined

Please explain.

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

1-2 2-5 5-10 10-25 25+

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

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

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

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

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

Yes No Maybe Don't know

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

Clean up Paint Signage Awnings Remodel Other _____

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

Yes No Maybe Don't know

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

Access Paint Products Remodel Signage Other _____

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

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

Yes No

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

(Check all that apply.)

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

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

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

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

City of Portland, Bureau of Planning
 Attn: Tina
 1900 SW Fourth Avenue, Suite 4100
 Portland, OR 97201-5350

Appendix C:

DEMOGRAPHIC AND HOUSING DATA



Demographic and Income Profile

NE Sandy Blvd AT NE 76th Ave
 Portland, OR 97213
 Site Type: Radius
 Latitude: 45.5499
 Longitude: -122.5848
 Radius: 1.0 miles

Summary	2000	2006	2011
Population	18,896	18,799	19,251
Households	7,496	7,400	7,554
Families	4,566	4,464	4,495
Average Household Size	2.49	2.51	2.52
Owner Occupied HUs	5,363	5,434	5,544
Renter Occupied HUs	2,133	1,966	2,010
Median Age	35.5	37.1	38.3

Trends: 2006-2011 Annual Rate	Area	State	National
Population	0.48%	1.23%	1.30%
Households	0.41%	1.23%	1.33%
Families	0.14%	1.02%	1.08%
Owner HHs	0.4%	1.27%	1.41%
Median Household Income	3.69%	3.29%	3.32%

Households by Income	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	996	13.3%	667	9.0%	541	7.2%
\$15,000 - \$24,999	1,009	13.5%	733	9.9%	564	7.5%
\$25,000 - \$34,999	1,056	14.2%	759	10.3%	653	8.6%
\$35,000 - \$49,999	1,229	16.5%	1,230	16.6%	1,017	13.5%
\$50,000 - \$74,999	1,855	24.9%	1,739	23.5%	1,505	19.9%
\$75,000 - \$99,999	803	10.8%	1,090	14.7%	1,333	17.7%
\$100,000 - \$149,999	394	5.3%	892	12.1%	1,335	17.7%
\$150,000 - \$199,999	89	1.2%	186	2.5%	378	5.0%
\$200,000+	31	0.4%	104	1.4%	226	3.0%
Median Household Income	\$42,731		\$54,605		\$65,435	
Average Household Income	\$48,463		\$63,185		\$77,914	
Per Capita Income	\$19,567		\$24,971		\$30,662	

Population by Age	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	1,313	6.9%	1,267	6.7%	1,277	6.6%
5 - 9	1,220	6.5%	1,227	6.5%	1,167	6.1%
10 - 14	1,160	6.1%	1,173	6.2%	1,221	6.3%
15 - 19	1,250	6.6%	1,138	6.1%	1,150	6.0%
20 - 24	1,195	6.3%	1,320	7.0%	1,265	6.6%
25 - 34	3,133	16.6%	2,650	14.1%	2,677	13.9%
35 - 44	3,347	17.7%	3,182	16.9%	2,865	14.9%
45 - 54	2,820	14.9%	3,012	16.0%	3,076	16.0%
55 - 64	1,408	7.5%	1,931	10.3%	2,563	13.3%
65 - 74	955	5.1%	849	4.5%	1,033	5.4%
75 - 84	829	4.4%	719	3.8%	599	3.1%
85+	264	1.4%	329	1.8%	357	1.9%

Race and Ethnicity	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
White Alone	14,099	74.6%	13,389	71.2%	13,151	68.3%
Black Alone	800	4.2%	845	4.5%	893	4.6%
American Indian Alone	189	1.0%	180	1.0%	177	0.9%
Asian Alone	1,822	9.6%	2,141	11.4%	2,483	12.9%
Pacific Islander Alone	76	0.4%	79	0.4%	82	0.4%
Some Other Race Alone	1,182	6.3%	1,404	7.5%	1,655	8.6%
Two or More Races	729	3.9%	760	4.0%	809	4.2%
Hispanic Origin (Any Race)	1,814	9.6%	2,165	11.5%	2,565	13.3%

Data Note: Income is expressed in current dollars.

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

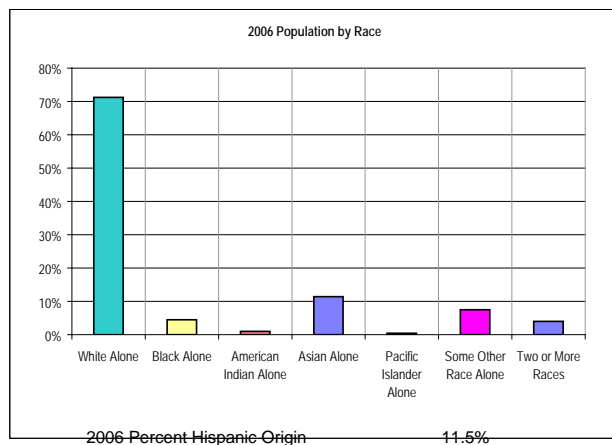
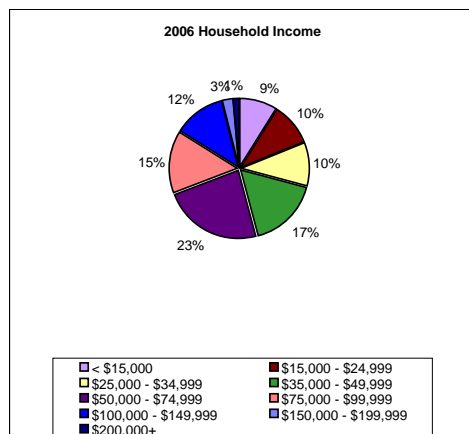
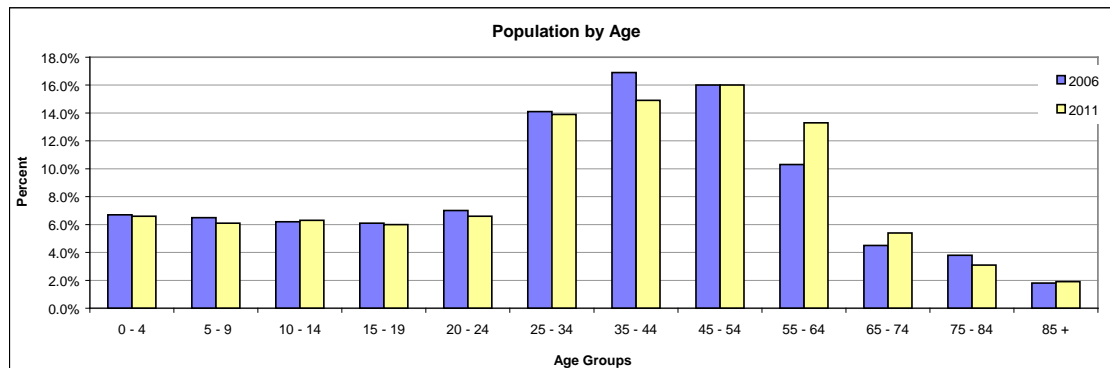
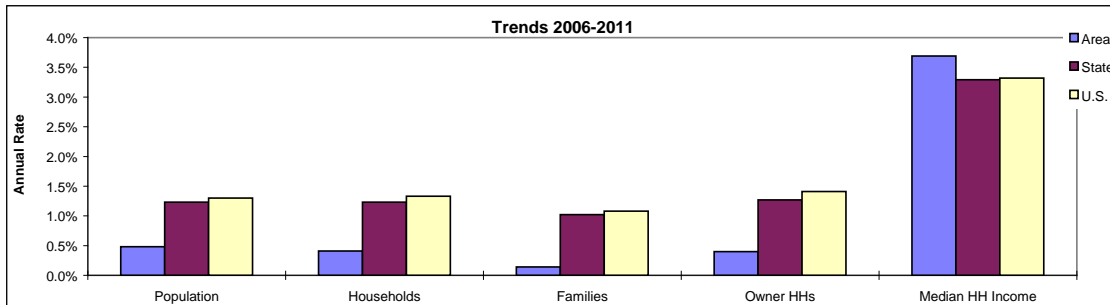


Demographic and Income Profile

NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213

Site Type: Radius

Latitude: 45.5499
Longitude: -122.5848
Radius: 1.0 miles



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



Demographic and Income Profile

**NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213**

**Latitude: 45.5499
Longitude: -122.5848
Radius: 3.0 miles**

Summary	2000	2006	2011
Population	129,788	131,615	135,339
Households	52,207	52,630	54,015
Families	30,500	30,420	30,781
Average Household Size	2.41	2.43	2.43
Owner Occupied HUs	33,494	34,666	35,636
Renter Occupied HUs	18,713	17,964	18,379
Median Age	36.3	37.9	39.2

Trends: 2006-2011 Annual Rate	Area	State	National
Population	0.56%	1.23%	1.30%
Households	0.52%	1.23%	1.33%
Families	0.24%	1.02%	1.08%
Owner HHs	0.55%	1.27%	1.41%
Median Household Income	3.5%	3.29%	3.32%

Households by Income	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	6,402	12.3%	4,795	9.1%	3,999	7.4%
\$15,000 - \$24,999	6,629	12.7%	4,619	8.8%	3,680	6.8%
\$25,000 - \$34,999	7,090	13.6%	5,537	10.5%	4,543	8.4%
\$35,000 - \$49,999	9,098	17.4%	8,493	16.1%	7,299	13.5%
\$50,000 - \$74,999	12,002	23.0%	11,714	22.3%	11,023	20.4%
\$75,000 - \$99,999	5,782	11.1%	7,727	14.7%	8,449	15.6%
\$100,000 - \$149,999	3,677	7.0%	6,405	12.2%	9,557	17.7%
\$150,000 - \$199,999	723	1.4%	2,042	3.9%	2,835	5.2%
\$200,000+	777	1.5%	1,299	2.5%	2,631	4.9%
Median Household Income	\$44,430		\$55,650		\$66,099	
Average Household Income	\$54,085		\$68,954		\$84,096	
Per Capita Income	\$22,093		\$28,077		\$34,102	

Population by Age	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	8,146	6.3%	7,942	6.0%	8,227	6.1%
5 - 9	7,741	6.0%	7,697	5.8%	7,114	5.3%
10 - 14	7,735	6.0%	7,594	5.8%	7,808	5.8%
15 - 19	8,086	6.2%	8,231	6.3%	7,821	5.8%
20 - 24	8,647	6.7%	9,028	6.9%	9,950	7.4%
25 - 34	21,634	16.7%	19,240	14.6%	18,972	14.0%
35 - 44	21,944	16.9%	21,024	16.0%	20,157	14.9%
45 - 54	20,140	15.5%	21,251	16.1%	20,405	15.1%
55 - 64	9,677	7.5%	14,305	10.9%	18,894	14.0%
65 - 74	6,994	5.4%	6,447	4.9%	7,620	5.6%
75 - 84	6,482	5.0%	5,777	4.4%	5,073	3.7%
85+	2,562	2.0%	3,079	2.3%	3,298	2.4%

Race and Ethnicity	2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
White Alone	100,507	77.4%	97,895	74.4%	97,184	71.8%
Black Alone	7,831	6.0%	8,413	6.4%	8,945	6.6%
American Indian Alone	1,165	0.9%	1,146	0.9%	1,142	0.8%
Asian Alone	9,978	7.7%	12,031	9.1%	14,063	10.4%
Pacific Islander Alone	462	0.4%	506	0.4%	546	0.4%
Some Other Race Alone	4,744	3.7%	6,131	4.7%	7,552	5.6%
Two or More Races	5,100	3.9%	5,494	4.2%	5,908	4.4%
Hispanic Origin (Any Race)	8,681	6.7%	11,232	8.5%	13,880	10.3%

Data Note: Income is expressed in current dollars.

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

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6/29/2007

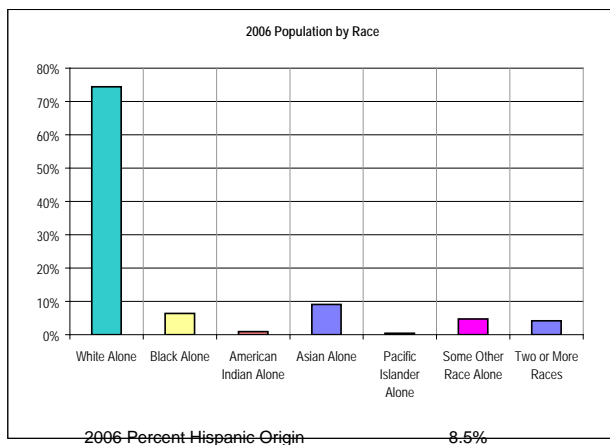
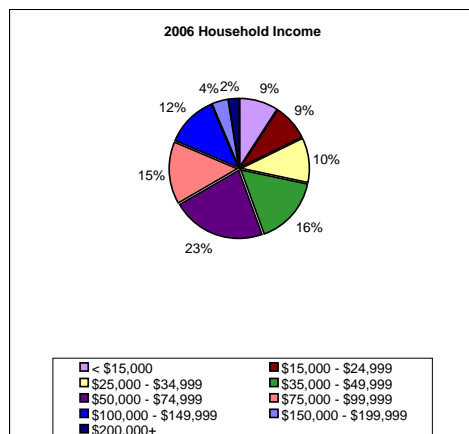
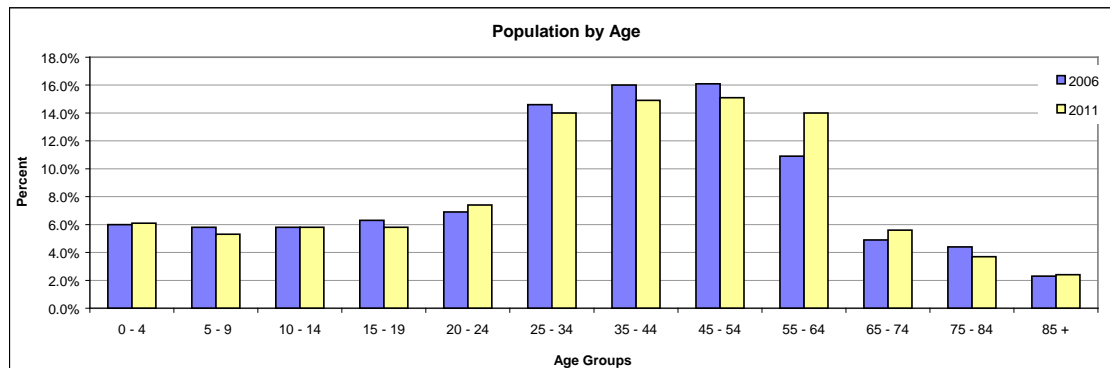
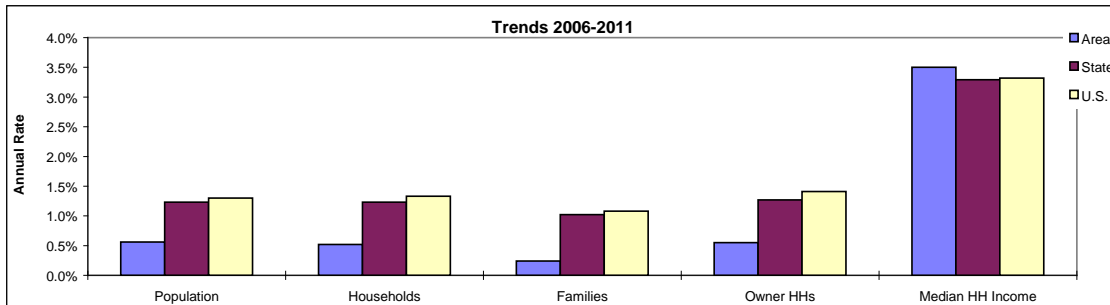


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Site Type: Radius

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Radius: 3.0 miles



Source: ESRI forecasts for 2006 and 2011.
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6/29/2007



Housing Profile

**NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213**

Site Type: Radius

**Latitude: 45.5499
Longitude: -122.5848
Radius: 1.0 miles**

2000 Total Population	18,896	2000 Median HH Income	\$42,731
2006 Total Population	18,799	2006 Median HH Income	\$54,605
2011 Total Population	19,251	2011 Median HH Income	\$65,435
2006-2011 Annual Rate	0.48%	2006-2011 Annual Rate	3.69%

Housing Units by Occupancy Status and Tenure

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	7,934	100.0%	8,037	100.0%	8,294	100.0%
Occupied	7,496	94.5%	7,400	92.1%	7,554	91.1%
Owner	5,363	67.6%	5,434	67.6%	5,544	66.8%
Renter	2,133	26.9%	1,966	24.5%	2,010	24.2%
Vacant	438	5.5%	637	7.9%	740	8.9%
Homeownership rate				73%		73%

Owner Occupied Housing Units by Value

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total	5,359	100.0%	5,434	100.0%	5,545	100.0%
< \$10,000	117	2.2%	83	1.5%	65	1.2%
\$10,000 - \$14,999	21	0.4%	44	0.8%	29	0.5%
\$15,000 - \$19,999	5	0.1%	19	0.3%	35	0.6%
\$20,000 - \$24,999	0	0.0%	13	0.2%	14	0.3%
\$25,000 - \$29,999	0	0.0%	3	0.1%	11	0.2%
\$30,000 - \$34,999	10	0.2%	2	0.0%	8	0.1%
\$35,000 - \$39,999	0	0.0%	0	0.0%	2	0.0%
\$40,000 - \$49,999	9	0.2%	4	0.1%	2	0.0%
\$50,000 - \$59,999	16	0.3%	8	0.1%	2	0.0%
\$60,000 - \$69,999	44	0.8%	4	0.1%	5	0.1%
\$70,000 - \$79,999	84	1.6%	5	0.1%	6	0.1%
\$80,000 - \$89,999	194	3.6%	12	0.2%	3	0.1%
\$90,000 - \$99,999	245	4.6%	19	0.3%	4	0.1%
\$100,000 - \$124,999	1,128	21.0%	136	2.5%	24	0.4%
\$125,000 - \$149,999	1,559	29.1%	279	5.1%	89	1.6%
\$150,000 - \$174,999	1,084	20.2%	598	11.0%	170	3.1%
\$175,000 - \$199,999	415	7.7%	727	13.4%	246	4.4%
\$200,000 - \$249,999	233	4.3%	1,801	33.1%	1,104	19.9%
\$250,000 - \$299,999	122	2.3%	1,037	19.1%	1,332	24.0%
\$300,000 - \$399,999	40	0.7%	440	8.1%	1,825	32.9%
\$400,000 - \$499,999	18	0.3%	137	2.5%	307	5.5%
\$500,000 - \$749,999	6	0.1%	44	0.8%	215	3.9%
\$750,000 - \$999,999	9	0.2%	8	0.1%	31	0.6%
\$1,000,000 +	0	0.0%	11	0.2%	16	0.3%
Median Value	\$137,933		\$221,127		\$285,792	
Average Value	\$143,014		\$229,530		\$300,388	

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

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



Housing Profile

NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213

Site Type: Radius

Latitude: 45.5499
Longitude: -122.5848
Radius: 1.0 miles

Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	437	100.0%
For Rent	173	39.6%
For Sale Only	90	20.6%
Rented/Sold, Unoccupied	62	14.2%
Seasonal/Recreational/Occasional Use	5	1.1%
For Migrant Workers	0	0.0%
Other Vacant	107	24.5%

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

	Occupied Units		Owner Occupied Units	
	Number	Percent	Number	% of Occupied
Total	7,494		5,362	71.6%
15 - 24	302		70	23.2%
25 - 34	1,394		801	57.5%
35 - 44	1,895		1,338	70.6%
45 - 54	1,695		1,327	78.3%
55 - 64	870		704	80.9%
65 - 74	591		488	82.6%
75 - 84	562		484	86.1%
85+	185		150	81.1%

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

	Occupied Units		Owner Occupied Units	
	Number	Percent	Number	% of Occupied
Total	7,498		5,364	71.5%
White Alone	6,235		4,755	76.3%
Black Alone	251		82	32.7%
American Indian Alone	67		38	56.7%
Asian Alone	474		318	67.1%
Pacific Islander Alone	14		4	28.6%
Some Other Race Alone	258		56	21.7%
Two or More Races	199		111	55.8%
Hispanic Origin	429		135	31.5%

Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	7,927	100.0%	7,478	100.0%
1, Detached	6,332	79.9%	6,096	81.5%
1, Attached	65	0.8%	58	0.8%
2	198	2.5%	181	2.4%
3 to 4	266	3.4%	205	2.7%
5 to 9	262	3.3%	230	3.1%
10 to 19	144	1.8%	144	1.9%
20 to 49	166	2.1%	145	1.9%
50 or More	181	2.3%	181	2.4%
Mobile Home	284	3.6%	212	2.8%
Other	29	0.4%	26	0.3%

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

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



Housing Profile

NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213

Site Type: Radius

Latitude: 45.5499
Longitude: -122.5848
Radius: 1.0 miles

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

	Number	Percent
Total	5,004	100.0%
With Mortgage	3,710	74.1%
< \$200	0	0.0%
\$200 - \$299	0	0.0%
\$300 - \$399	31	0.6%
\$400 - \$499	116	2.3%
\$500 - \$599	173	3.5%
\$600 - \$699	211	4.2%
\$700 - \$799	377	7.5%
\$800 - \$899	436	8.7%
\$900 - \$999	430	8.6%
\$1000 - \$1249	861	17.2%
\$1250 - \$1499	657	13.1%
\$1500 - \$1999	341	6.8%
\$2000 - \$2499	46	0.9%
\$2500 - \$2999	25	0.5%
\$3000+	6	0.1%
With No Mortgage	1,294	25.9%
Median Monthly Owner Costs for Units with Mortgage	\$1,024	
Average Monthly Owner Costs for Units with Mortgage	\$1,069	

Census 2000 Specified Renter Occupied Housing Units by Contract Rent

	Number	Percent
Total	2,119	100.0%
Paying Cash Rent	2,029	95.8%
< \$100	7	0.3%
\$100 - \$149	6	0.3%
\$150 - \$199	25	1.2%
\$200 - \$249	21	1.0%
\$250 - \$299	32	1.5%
\$300 - \$349	102	4.8%
\$350 - \$399	89	4.2%
\$400 - \$449	199	9.4%
\$450 - \$499	155	7.3%
\$500 - \$549	276	13.0%
\$550 - \$599	267	12.6%
\$600 - \$649	197	9.3%
\$650 - \$699	116	5.5%
\$700 - \$749	122	5.8%
\$750 - \$799	142	6.7%
\$800 - \$899	127	6.0%
\$900 - \$999	98	4.6%
\$1000 - \$1249	48	2.3%
\$1250 - \$1499	0	0.0%
\$1500 - \$1999	0	0.0%
\$2000 +	0	0.0%
No Cash Rent	90	4.2%
Median Rent	\$569	
Average Rent	\$578	
Average Gross Rent (with Utilities)	\$679	

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

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



Housing Profile

NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213

Site Type: Radius

Latitude: 45.5499
Longitude: -122.5848
Radius: 3.0 miles

2000 Total Population	129,788	2000 Median HH Income	\$44,430
2006 Total Population	131,615	2006 Median HH Income	\$55,650
2011 Total Population	135,339	2011 Median HH Income	\$66,099
2006-2011 Annual Rate	0.56%	2006-2011 Annual Rate	3.5%

Housing Units by Occupancy Status and Tenure

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	54,750	100.0%	56,259	100.0%	58,230	100.0%
Occupied	52,207	95.4%	52,630	93.5%	54,015	92.8%
Owner	33,494	61.2%	34,666	61.6%	35,636	61.2%
Renter	18,713	34.2%	17,964	31.9%	18,379	31.6%
Vacant	2,543	4.6%	3,629	6.5%	4,215	7.2%
Homeownership Rate		64%		66%		66%

Owner Occupied Housing Units by Value

	Census 2000		2006		2011	
	Number	Percent	Number	Percent	Number	Percent
Total	33,552	100.0%	34,666	100.0%	35,636	100.0%
< \$10,000	230	0.7%	171	0.5%	137	0.4%
\$10,000 - \$14,999	56	0.2%	91	0.3%	62	0.2%
\$15,000 - \$19,999	45	0.1%	47	0.1%	73	0.2%
\$20,000 - \$24,999	24	0.1%	41	0.1%	35	0.1%
\$25,000 - \$29,999	18	0.1%	26	0.1%	36	0.1%
\$30,000 - \$34,999	17	0.1%	31	0.1%	30	0.1%
\$35,000 - \$39,999	7	0.0%	16	0.0%	18	0.1%
\$40,000 - \$49,999	64	0.2%	27	0.1%	40	0.1%
\$50,000 - \$59,999	103	0.3%	18	0.1%	22	0.1%
\$60,000 - \$69,999	152	0.5%	42	0.1%	20	0.1%
\$70,000 - \$79,999	330	1.0%	45	0.1%	16	0.0%
\$80,000 - \$89,999	755	2.3%	78	0.2%	33	0.1%
\$90,000 - \$99,999	1,176	3.5%	90	0.3%	34	0.1%
\$100,000 - \$124,999	5,081	15.1%	545	1.6%	148	0.4%
\$125,000 - \$149,999	7,138	21.3%	1,218	3.5%	377	1.1%
\$150,000 - \$174,999	5,960	17.8%	2,876	8.3%	744	2.1%
\$175,000 - \$199,999	3,748	11.2%	3,418	9.9%	1,130	3.2%
\$200,000 - \$249,999	4,047	12.1%	8,717	25.1%	5,358	15.0%
\$250,000 - \$299,999	2,334	7.0%	6,606	19.1%	6,534	18.3%
\$300,000 - \$399,999	1,562	4.7%	5,916	17.1%	10,770	30.2%
\$400,000 - \$499,999	426	1.3%	2,736	7.9%	4,332	12.2%
\$500,000 - \$749,999	201	0.6%	1,534	4.4%	4,245	11.9%
\$750,000 - \$999,999	59	0.2%	222	0.6%	1,097	3.1%
\$1,000,000 +	19	0.1%	155	0.4%	345	1.0%
Median Value	\$156,628		\$249,059		\$327,586	
Average Value	\$176,993		\$282,498		\$369,978	

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

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



Housing Profile

NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213

Site Type: Radius

Latitude: 45.5499
Longitude: -122.5848
Radius: 3.0 miles

Census 2000 Vacant Housing Units by Status

	Number	Percent
Total	2,542	100.0%
For Rent	1,139	44.8%
For Sale Only	554	21.8%
Rented/Sold, Unoccupied	288	11.3%
Seasonal/Recreational/Occasional Use	101	4.0%
For Migrant Workers	0	0.0%
Other Vacant	460	18.1%

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

	Occupied Units		Owner Occupied Units	
	Number	Percent	Number	% of Occupied
Total	52,209		33,495	64.2%
15 - 24	2,469		310	12.6%
25 - 34	9,870		4,463	45.2%
35 - 44	11,894		7,810	65.7%
45 - 54	11,908		8,816	74.0%
55 - 64	5,944		4,438	74.7%
65 - 74	4,375		3,402	77.8%
75 - 84	4,270		3,271	76.6%
85+	1,479		985	66.6%

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

	Occupied Units		Owner Occupied Units	
	Number	Percent	Number	% of Occupied
Total	52,207		33,494	64.2%
White Alone	43,870		29,612	67.5%
Black Alone	2,776		1,167	42.0%
American Indian Alone	397		190	47.9%
Asian Alone	2,687		1,665	62.0%
Pacific Islander Alone	113		30	26.5%
Some Other Race Alone	1,089		251	23.0%
Two or More Races	1,275		579	45.4%
Hispanic Origin	2,132		679	31.8%

Census 2000 Housing Units by Units in Structure and Occupancy

	Housing Units		Occupied Units	
	Number	Percent	Number	Percent
Total	54,775	100.0%	52,236	100.0%
1, Detached	39,435	72.0%	38,063	72.9%
1, Attached	895	1.6%	851	1.6%
2	2,164	4.0%	2,048	3.9%
3 to 4	2,368	4.3%	2,178	4.2%
5 to 9	2,271	4.1%	2,070	4.0%
10 to 19	2,614	4.8%	2,418	4.6%
20 to 49	2,243	4.1%	2,051	3.9%
50 or More	2,106	3.8%	2,000	3.8%
Mobile Home	573	1.0%	468	0.9%
Other	106	0.2%	89	0.2%

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

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



Housing Profile

NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213

Site Type: Radius

Latitude: 45.5499
Longitude: -122.5848
Radius: 3.0 miles

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

	Number	Percent
Total	31,416	100.0%
With Mortgage	23,482	74.7%
< \$200	9	0.0%
\$200 - \$299	11	0.0%
\$300 - \$399	110	0.4%
\$400 - \$499	356	1.1%
\$500 - \$599	746	2.4%
\$600 - \$699	1,227	3.9%
\$700 - \$799	1,790	5.7%
\$800 - \$899	1,966	6.3%
\$900 - \$999	2,235	7.1%
\$1000 - \$1249	5,459	17.4%
\$1250 - \$1499	3,882	12.4%
\$1500 - \$1999	3,946	12.6%
\$2000 - \$2499	1,212	3.9%
\$2500 - \$2999	325	1.0%
\$3000+	208	0.7%
With No Mortgage	7,934	25.3%
Median Monthly Owner Costs for Units with Mortgage	\$1,151	
Average Monthly Owner Costs for Units with Mortgage	\$1,232	

Census 2000 Specified Renter Occupied Housing Units by Contract Rent

	Number	Percent
Total	18,670	100.0%
Paying Cash Rent	18,157	97.3%
< \$100	167	0.9%
\$100 - \$149	279	1.5%
\$150 - \$199	259	1.4%
\$200 - \$249	164	0.9%
\$250 - \$299	269	1.4%
\$300 - \$349	417	2.2%
\$350 - \$399	754	4.0%
\$400 - \$449	1,330	7.1%
\$450 - \$499	1,769	9.5%
\$500 - \$549	2,605	14.0%
\$550 - \$599	2,578	13.8%
\$600 - \$649	1,470	7.9%
\$650 - \$699	1,416	7.6%
\$700 - \$749	910	4.9%
\$750 - \$799	835	4.5%
\$800 - \$899	1,137	6.1%
\$900 - \$999	722	3.9%
\$1000 - \$1249	650	3.5%
\$1250 - \$1499	290	1.6%
\$1500 - \$1999	120	0.6%
\$2000 +	16	0.1%
No Cash Rent	513	2.7%
Median Rent	\$571	
Average Rent	\$601	
Average Gross Rent (with Utilities)	\$689	

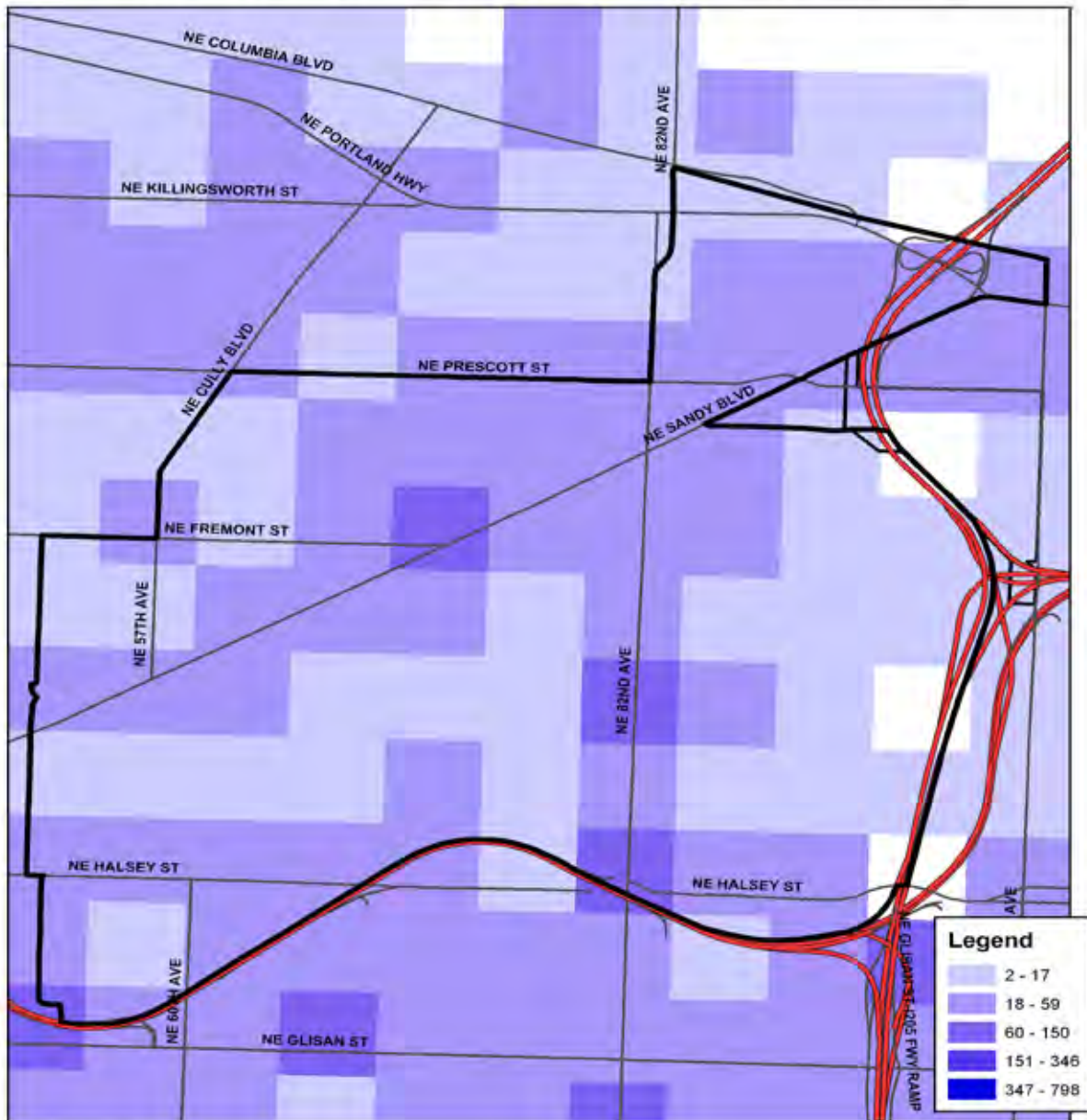
Data Note: Specified Owner Occupied Housing Units exclude houses on 10+ acres, mobile homes, units in multiunit buildings, and houses with a business or medical office. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Contract Rent and Average Gross Rent exclude units paying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

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

Appendix D:

SANDY BLVD. CRIME MAP

Portland Police Bureau
2005 Part I Crime Density: Sandy Boulevard (57th to 92nd Avenue)

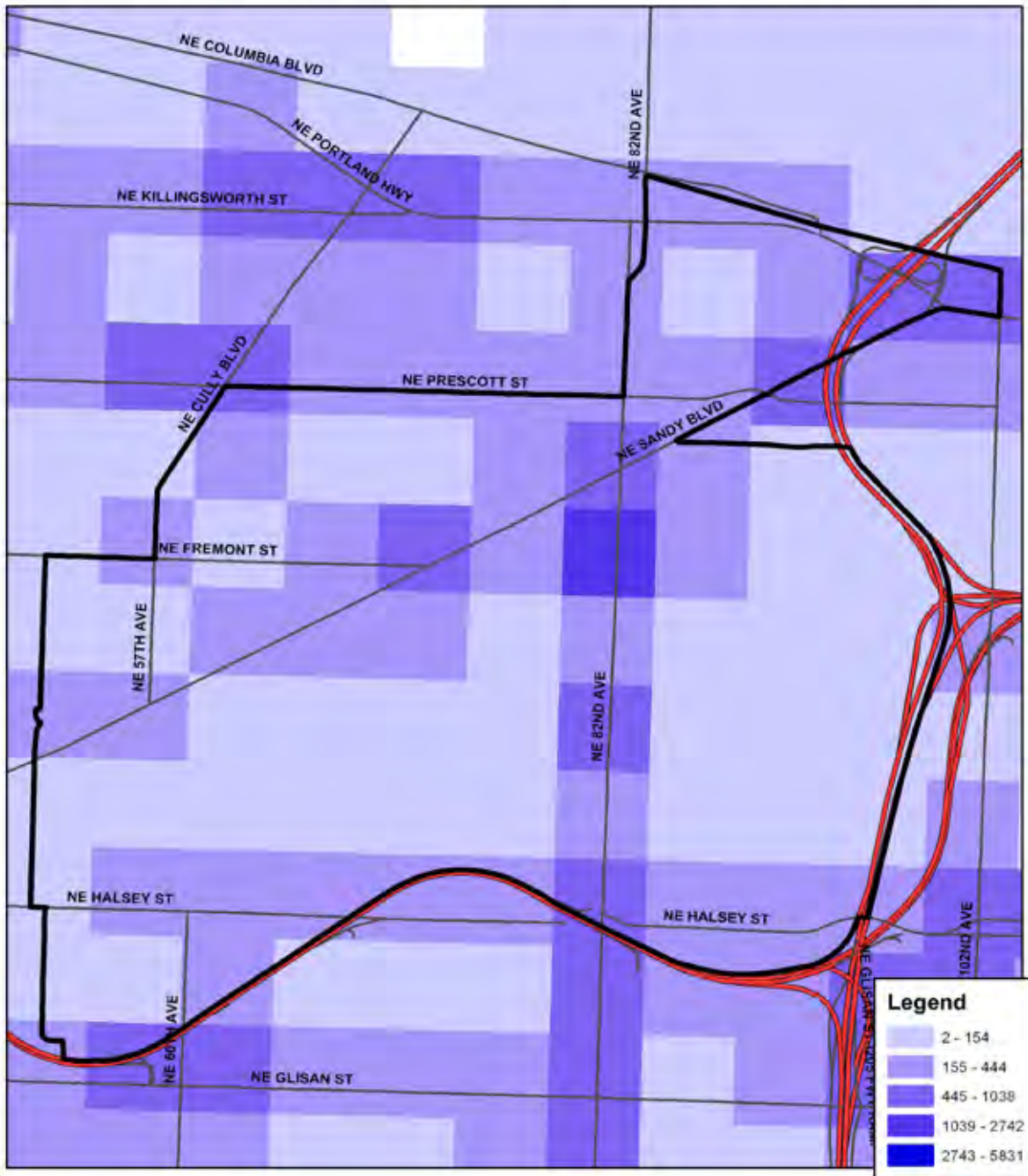


Portland Police Bureau
Data Source: SCL Program 1/03/07
Sandy Boulevard area consists of census tracts 29.01, 29.02, 28.01, 28.02, 29.03, and 77
Overlay grid consists of quarter mile squares

Appendix E:

SANDY BLVD. CALLS FOR SERVICE MAP

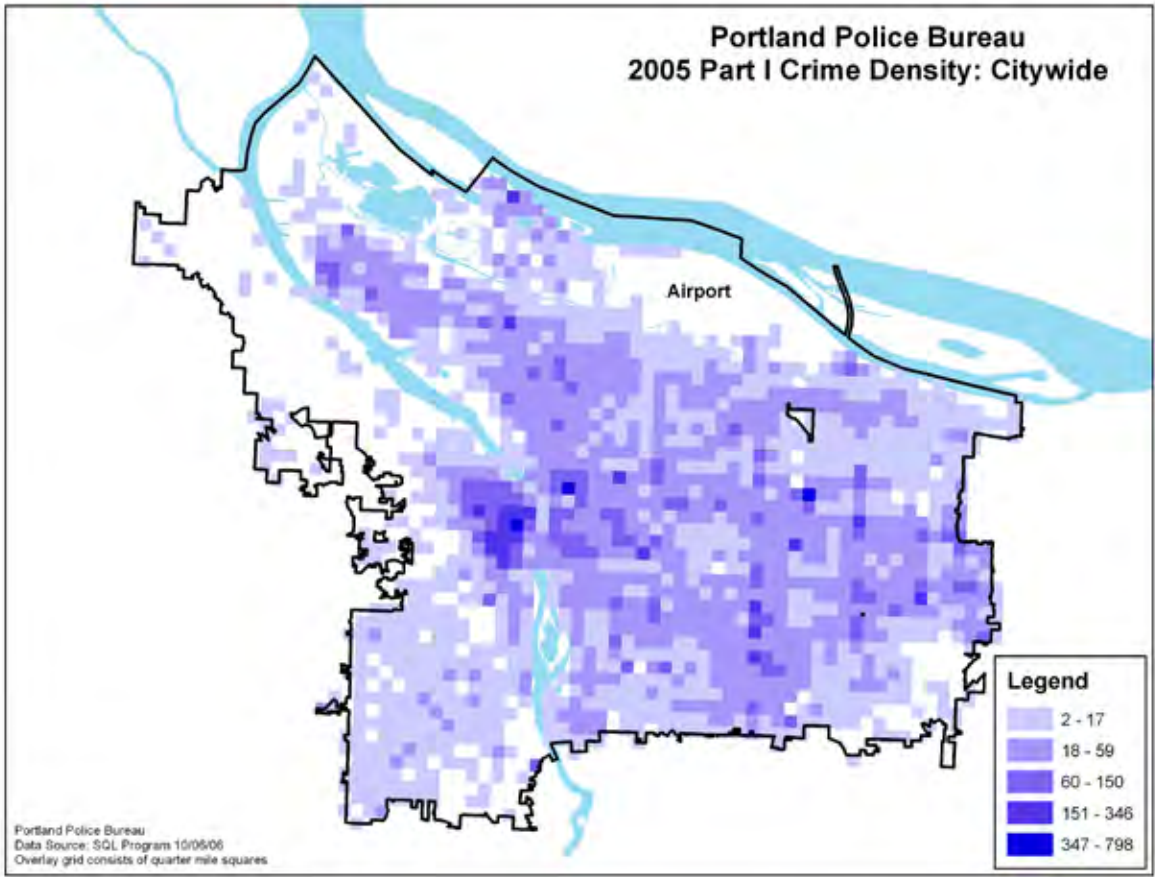
Portland Police Bureau
2005 Calls for Service Density: Sandy Boulevard (57th to 92nd Avenue)



Portland Police Bureau
Data Source: SQL Program 1/03/07
Sandy Boulevard area consists of census tracts 29.01, 29.02, 28.01, 28.02, 29.03, and 77
Overlay grid consists of quarter mile squares

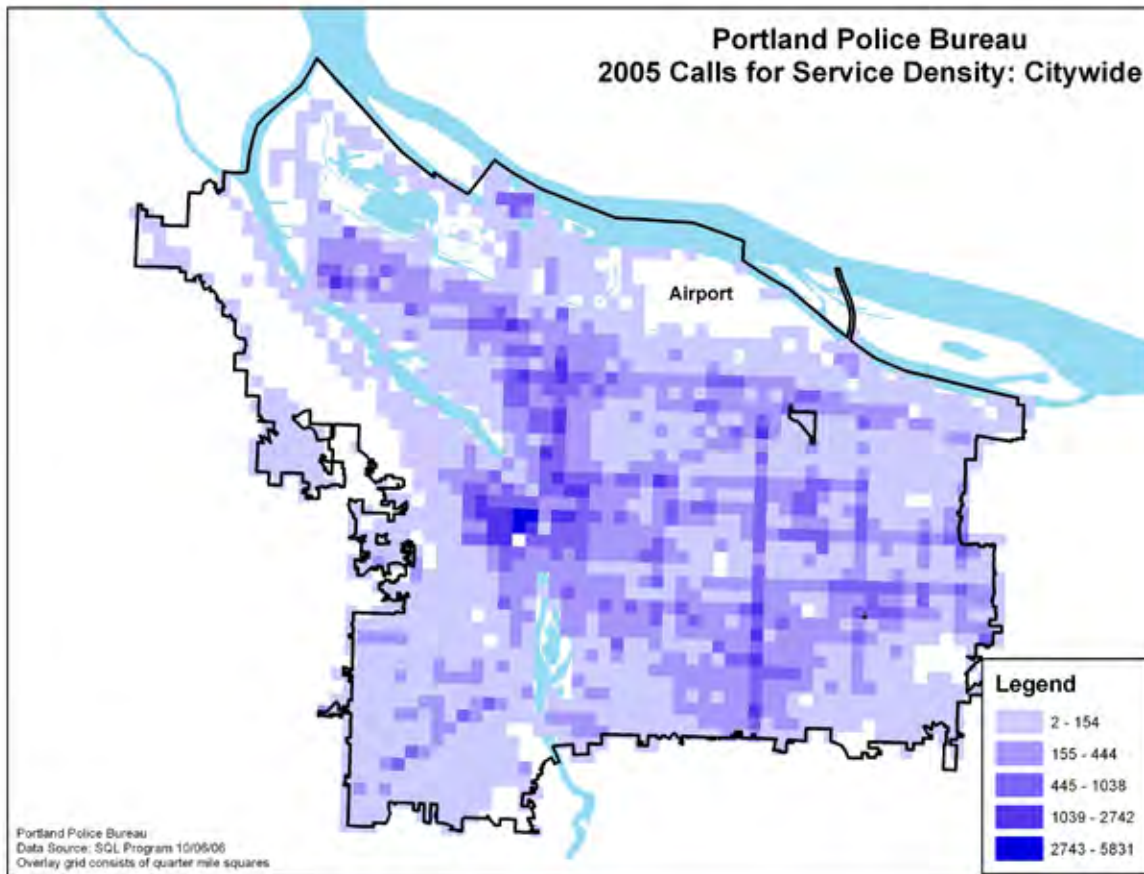
Appendix F:

CITYWIDE CRIME MAP



Appendix G:

CITYWIDE CALLS FOR SERVICE MAP



Appendix G:

DETAILED MARKET ANALYSIS DATA



Retail MarketPlace Profile

NE Sandy Blvd AT NE 76th Ave
Portland, OR 97213

Site Type: Radius

Latitude: 45.5499
Longitude: -122.5848
Radius: 1.0 miles

Summary Demographics

2006 Population	18,799
2006 Households	7,400
2006 Median Disposable Income	\$39,260
2006 Per Capita Income	\$24,971

Industry Summary

	Supply (Retail Sales)	Demand (Retail Potential)	Leakage/ Surplus	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$115,696,332	\$181,492,774	22.1	119
Total Retail Trade (NAICS 44-45)	\$96,510,552	\$152,750,718	22.6	78
Total Food & Drink (NAICS 722)	\$19,185,780	\$28,742,056	19.9	41

	Supply (Retail Sales)	Demand (Retail Potential)	Leakage/ Surplus	Number of Businesses
NAICS 441: Motor Vehicle & Parts Dealers	\$21,158,495	\$42,681,312	33.7	13
NAICS 4411: Automobile Dealers	\$4,768,428	\$35,633,326	76.4	2
NAICS 4412: Other Motor Vehicle Dealers	\$10,013,569	\$3,360,884	-49.7	5
NAICS 4413: Auto Parts, Accessories, and Tire Stores	\$6,376,498	\$3,687,102	-26.7	6
NAICS 442: Furniture & Home Furnishings Stores	\$2,089,498	\$4,886,020	40.1	4
NAICS 4421: Furniture Stores	\$698,118	\$3,371,825	65.7	1
NAICS 4422: Home Furnishings Stores	\$1,391,380	\$1,514,195	4.2	3
NAICS 443/NAICS 4431: Electronics & Appliance Stores	\$358,470	\$3,925,718	83.3	3
NAICS 444: Bldg Materials, Garden Equip. & Supply Stores	\$516,225	\$7,033,576	86.3	3
NAICS 4441: Building Material and Supplies Dealers	\$479,783	\$6,401,488	86.1	3
NAICS 4442: Lawn and Garden Equipment and Supplies Stores	\$36,442	\$632,088	89.1	0
NAICS 445: Food & Beverage Stores	\$33,839,075	\$23,124,671	-18.8	20
NAICS 4451: Grocery Stores	\$31,856,857	\$19,962,482	-23.0	16
NAICS 4452: Specialty Food Stores	\$1,337,945	\$2,099,716	22.2	3
NAICS 4453: Beer, Wine, and Liquor Stores	\$644,273	\$1,062,473	24.5	1
NAICS 446/NAICS 4461: Health & Personal Care Stores	\$3,157,392	\$4,743,922	20.1	4
NAICS 447/NAICS 4471: Gasoline Stations	\$12,870,992	\$14,508,014	6.0	2
NAICS 448: Clothing and Clothing Accessories Stores	\$16,652,727	\$7,746,728	-36.5	8
NAICS 4481: Clothing Stores	\$15,939,786	\$6,251,212	-43.7	6
NAICS 4482: Shoe Stores	\$262,276	\$576,381	37.5	1
NAICS 4483: Jewelry, Luggage, and Leather Goods Stores	\$450,665	\$919,135	34.2	1
NAICS 451: Sporting Goods, Hobby, Book, and Music Stores	\$1,473,088	\$4,122,073	47.3	6
NAICS 4511: Sporting Goods/Hobby/Musical Instrument Stores	\$1,172,002	\$2,071,656	27.7	3
NAICS 4512: Book, Periodical, and Music Stores	\$301,086	\$2,050,417	74.4	3

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) represents the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor is a measure of consumer demand relative to supply, ranging from 100 (total leakage) to -100 (total surplus). ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

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