

# PORLAND PLAN

## 20-Minute Neighborhoods Analysis: Background Report and Analysis Area Summaries



PORLAND PLAN BACKGROUND REPORT  
JUNE 2012



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*City of Portland, Oregon  
Sam Adams, Mayor • Susan Anderson, Director*

# Acknowledgments

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# Overview

## 20-Minute Neighborhoods Analysis

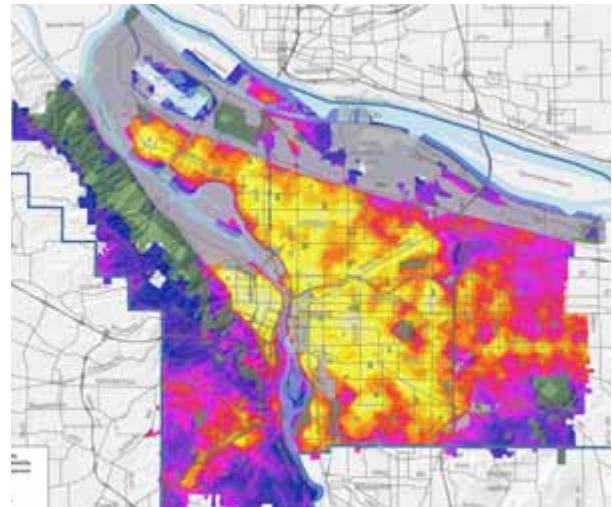
This report documents the methodology and results from the “20-Minute Neighborhoods Analysis,” which analyzed the extent to which features that contribute to walkability and local access to services vary across the city. The analysis took into account both the presence of local destinations, such as commercial services, parks, and schools; as well as factors that impact the ability to access these destinations, such as street connectivity, sidewalks, transit service and topography.

## Analysis Area Summaries

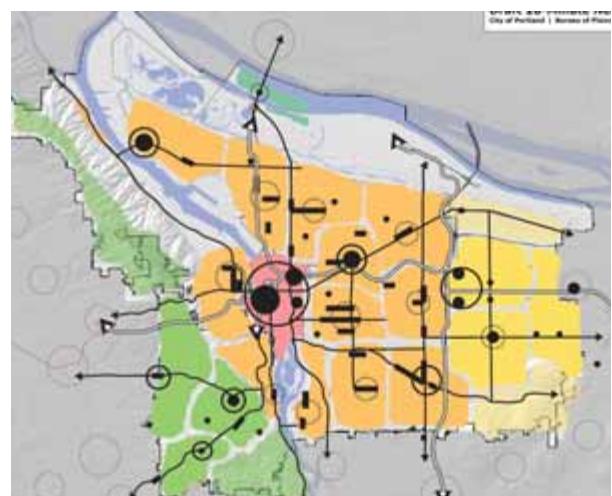
Following the description of the 20-Minute Neighborhoods Analysis methodology and results, the report includes a summary of services, community characteristics, demographics, and commercial indicators for 24 analysis areas. The analysis areas are primarily based around neighborhood business districts where local commercial services are concentrated, together with surrounding residential areas. The analysis area summaries supplement the citywide 20-Minute Neighborhoods Analysis by identifying at a more local level the extent to which areas have the commercial and community services, and the street and transit infrastructure, that allow people to meet their needs locally by walking, biking, or wheelchair. These summaries also include other information useful for understanding issues and opportunities related to local access to services and jobs, such as demographics and retail and employment conditions.

As part of the Portland Plan and the Comprehensive Plan update, the mapping and other results from the analysis are intended to inform discussion related to the community's interest in fostering Portland as a walkable city in which most people have options to meet their needs locally and can get around safely and easily by walking, biking, or wheelchair. It identifies areas that have elements that currently make this possible, as well as areas with deficiencies that need to be addressed if they are to evolve into more pedestrian-oriented places, or where it may not be feasible – or desirable – to foster concentrations of people, services and infrastructure.

The information in this report is intended to be only a starting point for understanding how issues and needs vary across Portland. What is presented here is not intended to be a comprehensive inventory of everything that contributes to walkable neighborhoods or that may be essential community elements. Much more information could be useful to have presented at the geographic scale of the analysis area summaries. We encourage others to generate data for other characteristics using these analysis area geographies to enrich the community's understanding of a range of issues and to provide additional points of comparison.



*20-Minute Neighborhoods Analysis Map*



*Analysis Areas*

*Create vibrant neighborhoods where 90 percent of Portland residents and 80 percent of Multnomah County residents can easily walk or bicycle to meet all basic daily, non-work needs and have safe pedestrian or bicycle access to transit.*

*- Portland Climate Action Plan*

## 20-Minute Neighborhoods Analysis: Methodology and Results

### Purpose

As part of the public planning process of the Portland Plan and the city's Comprehensive Plan update, the Bureau of Planning and Sustainability undertook the 20-Minute Neighborhoods Analysis, a detailed study to assess the quality of the walking environment and accessibility of services in different parts of Portland. As the above objective from Portland's *Climate Action Plan* indicates, Portland has established objectives for walkable access to services, for which the 20-Minute Neighborhoods Analysis is intended to provide an objective basis for assessing current conditions and measuring future progress.

The 20-Minute Neighborhood Analysis emerged from community interest in having a more robust analysis of "walkability" – access by walking – in Portland than what was currently published or available online. Similar to Walk Score ([www.walkscore.com](http://www.walkscore.com)), the 20-Minute Neighborhood Analysis represents the range of accessibility by walking in different parts of the city. However, while Walk Score focuses primarily on **proximity** to destinations such as commercial and community services, the 20-Minute Neighborhoods Analysis was developed to take into account additional factors related to access, particularly related to the street system and pedestrian conditions. It takes into account barriers to pedestrian access, such as topography (steep grades), rivers, freeways and difficult street connections. The analysis also considers factors that enhance the walking experience, such as the presence of sidewalks, variety of pathways or connections, proximity to high-quality frequent transit, and the proximity to clusters of amenities.

Note that reference in this analysis to walkability and the pedestrian environment is intended to be inclusive of users of wheelchairs and other mobility aids. Portland is committed to including accessible features, such as curb ramps, in all pedestrian infrastructure improvements to ensure that the pedestrian system is accessible to all.

### What is a 20-Minute Neighborhood?

A 20-minute neighborhood is a place with convenient, safe, and pedestrian-oriented access to the places people need to go to and the services people use nearly every day: transit, shopping, healthy food, school, parks, and social activities. The term "20-minute neighborhoods" is not intended to convey a specific metric. Rather, the concept is another way to describe what have alternatively been called walkable environments, vibrant neighborhoods, complete communities, or urban villages. The 20-minute neighborhoods concept is about cultivating places where people can safely walk relatively short distances from home to the destinations and services they use on a daily basis.

Other Portland Plan documents refer to a related term, “neighborhood hubs.” Neighborhood hubs are compact places with concentrations of neighborhood businesses, community services, housing and public gathering places that serve the surrounding area, functioning as anchors to broader 20-minute neighborhoods.

20-minute neighborhoods, in combination with their hubs, have the following three basic characteristics:

- A walkable environment,
- Destinations that support a range of daily needs (i.e., shops, jobs, parks, etc.), and
- Residential density close to services.

Some aspects of a walkable environment are intuitive. They are compact, with good walking surfaces. They have direct, obvious and safe routes with frequent connections to attractive destinations – places to which people need and want to go. Other aspects of 20-minute neighborhoods or walkable environments may not be immediately obvious. However, a growing body of national and international research agrees on a basic set of features and elements that make walkable environments or 20-minute neighborhoods. According to the research, elements that contribute to walkable communities generally include the following:

- Concentrations of housing in close proximity to neighborhood services and transit;
- a street grid or other frequently connected network of local streets;
- sidewalks or other safe pedestrian connections with accessible design;
- building scale and design features that are comfortable for pedestrians;
- distinct and identifiable centers and public spaces;
- a variety of connected transportation options; and
- lower speed streets.

## Analysis Approach

To understand how the 20-minute neighborhood concept might apply in Portland, the Bureau of Planning and Sustainability analyzed Portland’s neighborhoods in terms of two primary factors:

- **Distance and design:** how far people need to travel to reach destinations, and the extent to which street connectivity, sidewalks and other conditions facilitate walking. Access to frequent-service transit was also considered as a factor in providing options to reach destinations.
- **Destinations:** the presence of nearby businesses (grocery stores, restaurants, and retail) and public facilities (schools and parks).

## Distance and Design

Some studies have shown that a 20-minute walk equates to approximately one mile when walking at a fast pace; however, the average person is more likely to walk distances between  $\frac{1}{4}$  to a  $\frac{1}{2}$  mile under safe, conducive walking conditions (e.g., sidewalks and short blocks).

Intersection density and street connectivity, providing more direct pedestrian and bicycle access to destinations, are among the variables most highly correlated with walking and reduced vehicle miles travelled.<sup>1</sup> Frequent street connections increase the ability for pedestrians to conveniently access destinations in ways that minimize out-of-direction travel that can be a

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<sup>1</sup> Ewing, Reid and Cervero, Robert, *Travel and the Built Environment*, 2010

deterrent to walking. Reflecting street connectivity, the 20-Minute Neighborhoods analysis mapped the one-mile travel radius around destinations as traveled along streets, instead of a 1-mile straight-line radius. Barriers presented by features such as freeways, rivers, and ravines that limit opportunities for pedestrian access, were also reflected in the mapping of the one-mile travel distances. Another type of barrier the analysis considered were slopes over 20-percent, as steep topography limits walking and biking accessibility.

The analysis also took into account the presence of sidewalks as a factor in walkability, as a lack of sidewalks reduces the ability of pedestrians to access destinations safely, especially along busy streets.

Transit, which gives access to more distant destinations, was also included in the analysis as a factor. The availability of transit increases the ability for people to reach jobs, services, and amenities not available within walking distance, reducing the need to drive in order to meet daily needs.

## Destinations

Destinations refer to the quality and type of destination. In this analysis, the following destinations were evaluated: full service grocery stores, neighborhood-serving retail, eating & drinking establishments, parks, and elementary schools.

Research indicates that land use diversity and having a concentration of destinations within walking distance (along with street connectivity) are the variables most highly correlated with walking and reduced vehicle miles travelled.<sup>2</sup>

Specific types of local destinations most highly correlated with walking include grocery stores, retail stores, and eating and drinking establishments, particularly when such destinations were clustered together.<sup>3</sup> In addition to these types of destinations, this analysis included parks and elementary schools, as elements that community members consider to be essential local services (Portland's *Parks 2020 Vision* states a goal of having a neighborhood park within a half mile of every Portland resident).<sup>4</sup>

## Other Considerations

The analysis did not include residential density as an input, although population is strongly related to factors that were part of the analysis, such as the amount of local commercial services. Density is needed to support the local retail services that are key components of walkable neighborhoods. Neighborhoods with a wide-range of services within walking distance of residents require higher residential densities than are typically found where the car is the dominate mode of travel. It appears from the literature that 12-18 households per acre (often achieved in older neighborhoods with a mix of houses and low-rise multifamily housing) is the minimum density needed to support a commercial district with the retail uses used in this analysis. As an example of this relationship, a retail industry standard is that 10,000 people are needed to support a full-service supermarket.

The analysis did not asses industrial areas (shown in grey on analysis map), as the focus of the analysis was on residential access to services.

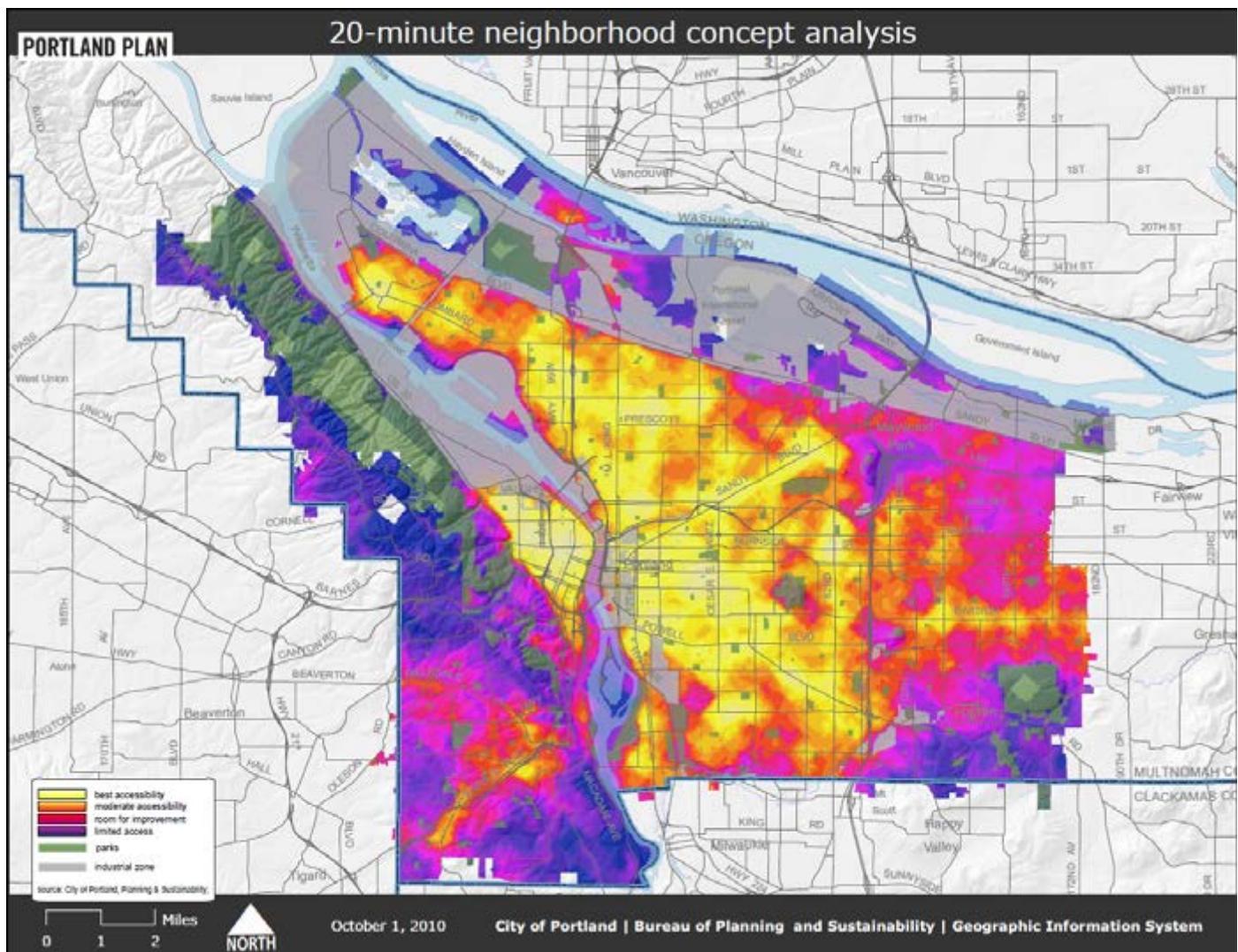
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<sup>2</sup> *Ibid*

<sup>3</sup> Moudon, Anne V. et al, *Operational Definitions of Walkable Neighborhood: Theoretical and Empirical Insights*, 2006

<sup>4</sup> Note that the inclusion of specific types of commercial services in this analysis is not intended to indicate that they are utilized by all populations or cultural groups. The primary intent of this analysis was to identify, at a general level, the local availability and clustering of commercial services. The commercial and community services needs of specific areas vary by community and culture and will need to be the focus of area-specific studies.

## Analysis Mapping and Methodology Details



The primary product of the 20-minute neighborhood analysis was a “hot spots” map identifying the gradient of access to services in different parts of the city. “Hot spots” – orange, yellow, to white (hottest) reflect areas with a greater degree of access, both in terms of concentrations of local services as well as in terms of distance and street system accessibility. Magenta to blue areas have less convenient pedestrian access to services. This map is a composite based on GIS analysis of a range of elements that contribute to walkable neighborhoods: grocery stores, other commercial services, parks, elementary schools, street connectivity, sidewalks, frequent transit service, topography (see pages 9-13 for mapping of these inputs).

Typically, the areas shown in white to orange have a significant presence of most of these elements. The red to dark purple areas have some of the elements. The areas shown in blue are areas that lack significant 20-minute neighborhood characteristics.

This geographic information systems analysis used the Spatial Analyst Weighted Sum tool. The analysis captured data inputs up to one mile beyond the city boundary to give more accurate values in areas at the edge of the city. Inputs were simplified so that the input of any feature category was 0 – 3 (see below). Industrial areas were excluded from this analysis, as its focus was on residents’ access to services.

## Input layers

- **Grocery stores:** full-service grocery stores (walking distance ¼, ½, 1 mile)
- **Commercial type 1:** convenience stores, beer, wine & liquor stores – NAICS codes 4451 (except those in full service grocery) and 4453 (walking distance ¼, ½, 1 mile)
- **Commercial type 2:** clusters of restaurants, specialty grocery stores, health and personal services, brewpubs, bakeries, bars, dry cleaning and laundry – NAICS codes 4452, 4461, 7221, 7222, 7224, 8123, 31212, 311811 (number of occurrences by square ¼ mile grid cell)
- **Parks Access:** (walking distance ¼ , ½ & 1 mile – source, Parks Bureau [except school grounds])
- **Public Elementary Schools:** (walking distance ¼, ½, 1 mile)
- **Street intersections:** proxy for street connectivity (number of occurrences by square ¼ mile grid cell)
- **Sidewalks:** (area coverage percentage by square ¼ mile grid cell)
- **Frequent Service Transit Stops:** frequent service every 15 minutes (or better) during peak hours (walking distance ¼, ½, 1 mile)

## Technical Details

### ArcGIS Network Analyst

Where possible, Network Analyst was used to calculate walking distance. Slopes greater than 20 percent were removed (using Lidar Slope data) as were freeways and ramps, to take into account the barriers they present to walking. Distance increments used in the analysis were ¼, ½ and 1 mile. Those categories were assigned the values 1 -3 for the grid analysis (ranging from a value of 3 for ¼ mile to 1 for 1 mile).

### Quarter Mile Grid and Spatial Analysis

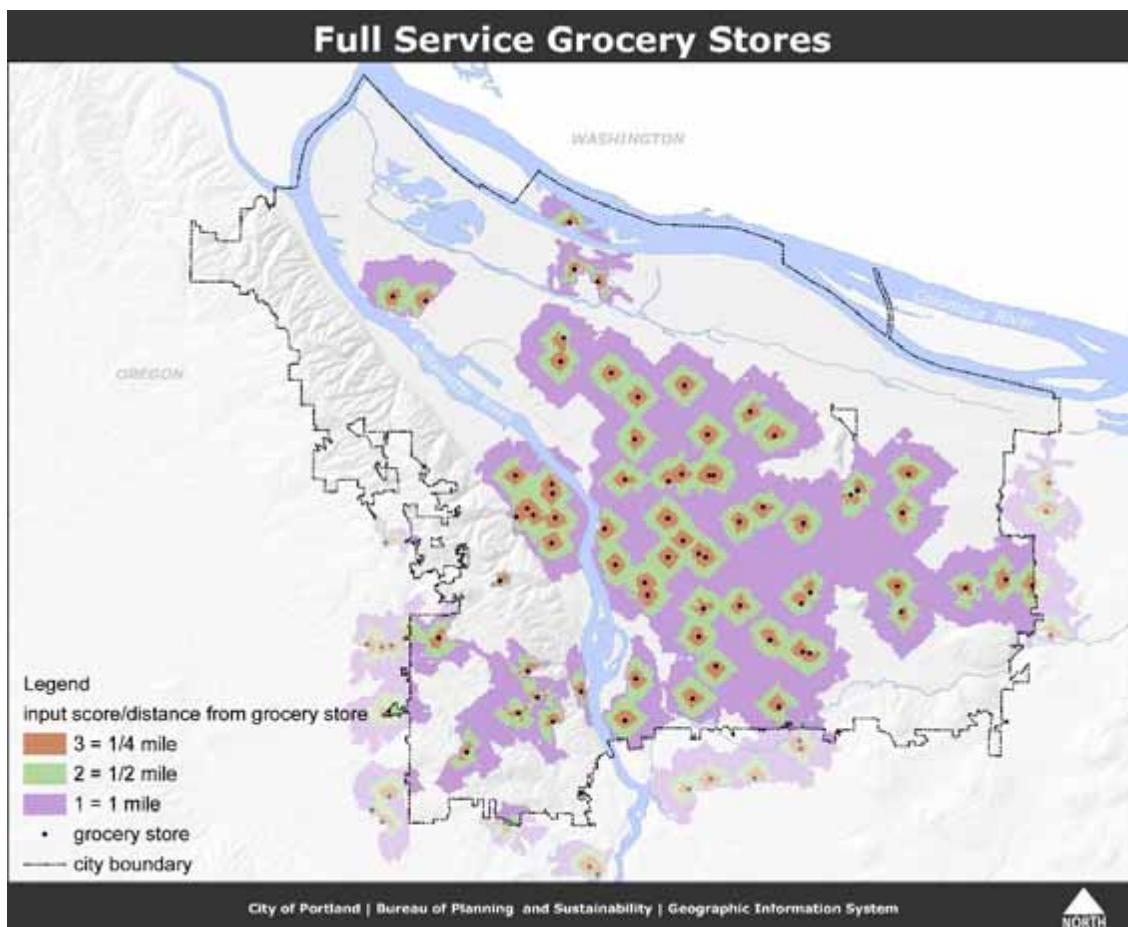
The concentration/density of elements (clusters of type 2 commercial, street intersections, sidewalk coverage) was measured using a 2640' x 2640' (quarter-mile square) grid cell by summing the number of occurrences per cell.

Total values for grid cell datasets were generalized into values of 1, 2 and 3 in order to make the inputs uniform to the Network Analyst walking distance scores. The Jenks (Natural Breaks) classification method with 3 categories was used to determine where the categories would be split for assigning 1-3 values for the grid. Zero values were excluded. The Jenks method was used to avoid manipulating results as much as possible. The network and grid cell datasets were then converted to raster datasets in preparation for creating the combined output raster dataset in Spatial Analyst. Each input was given equal weight in the latest version of the analysis. The output raster cell size chosen was 200' x 200' (reflecting the Portland city block size of 200' x 200'). The initial output raster dataset was run through the Neighborhood Statistics tool in Spatial Analyst for smoothing.

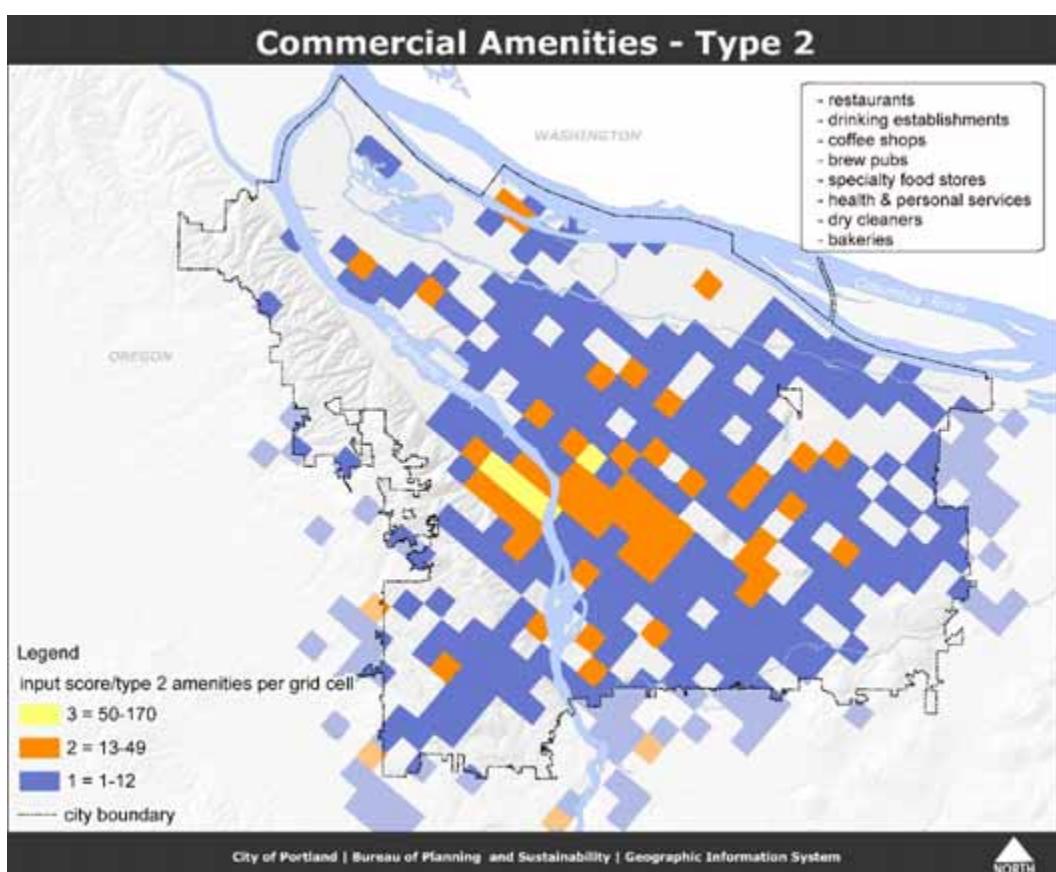
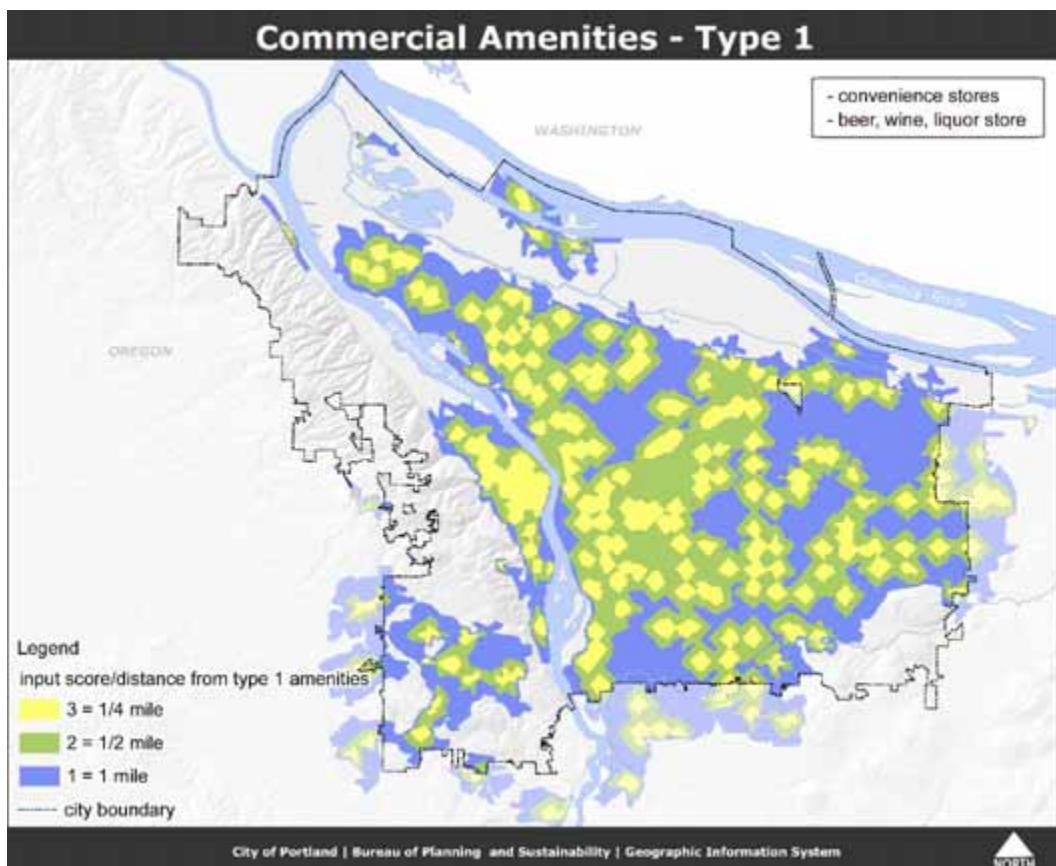
## Categories and distance/concentration values

- Grocery stores:  $\frac{1}{4}$  mile = **3**,  $\frac{1}{2}$  mile = **2**, 1 mile = **1**
- Commercial type 1:  $\frac{1}{4}$  mile = **3**,  $\frac{1}{2}$  mile = **2**, 1 mile = **1**
- Commercial type 2 occurrences: 50-170 / **3**, 13-49 / **2**, 1-12 / **1**
- Parks access points:  $\frac{1}{4}$  mile = **3**,  $\frac{1}{2}$  mile = **2**, 1 mile = **1**
- Elementary Schools:  $\frac{1}{4}$  mile = **3**,  $\frac{1}{2}$  mile = **2**, 1 mile = **1**
- Intersections: 45-114 = **3**, 18-44 = **2**, 1-17 = **1**
- Sidewalk percent area of grid cell: 4.2-15% = **3**, 1.6 – 4.1% = **2**, 0.1-1.5% = **1**
- Frequent Service Transit Stops:  $\frac{1}{4}$  mile = **3**,  $\frac{1}{2}$  mile = **2**, 1 mile = **1**

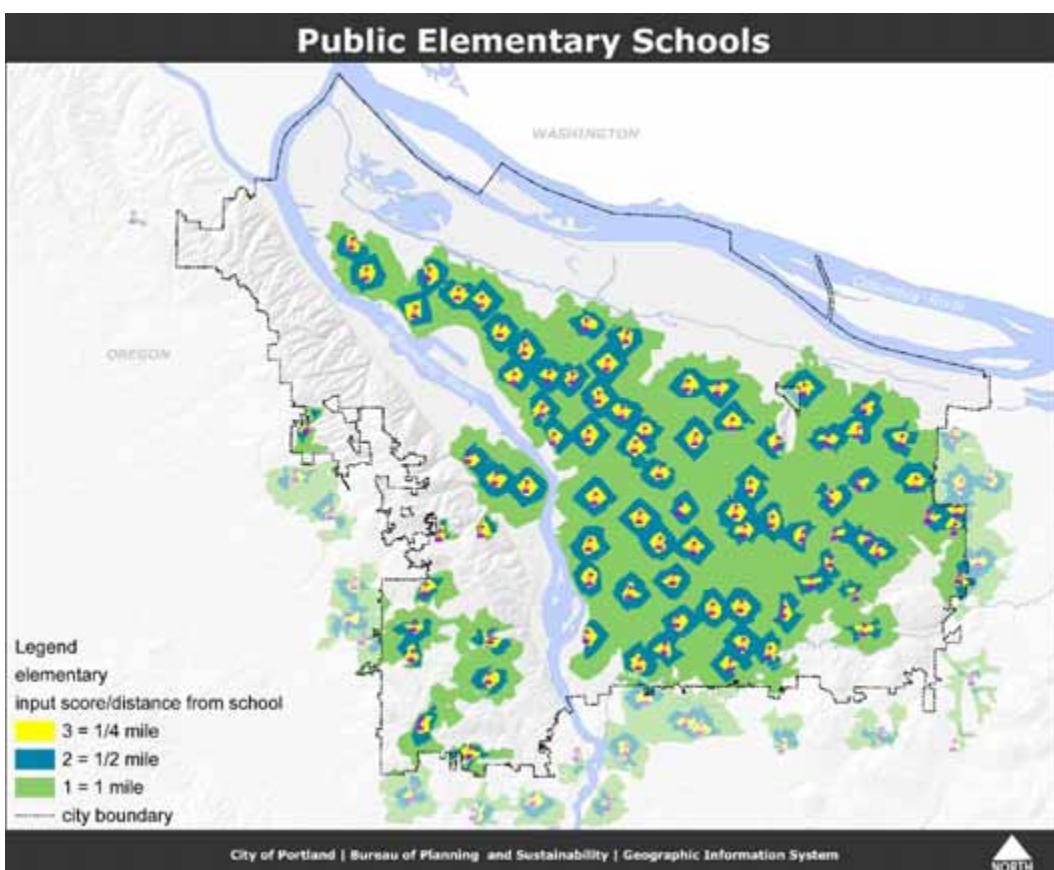
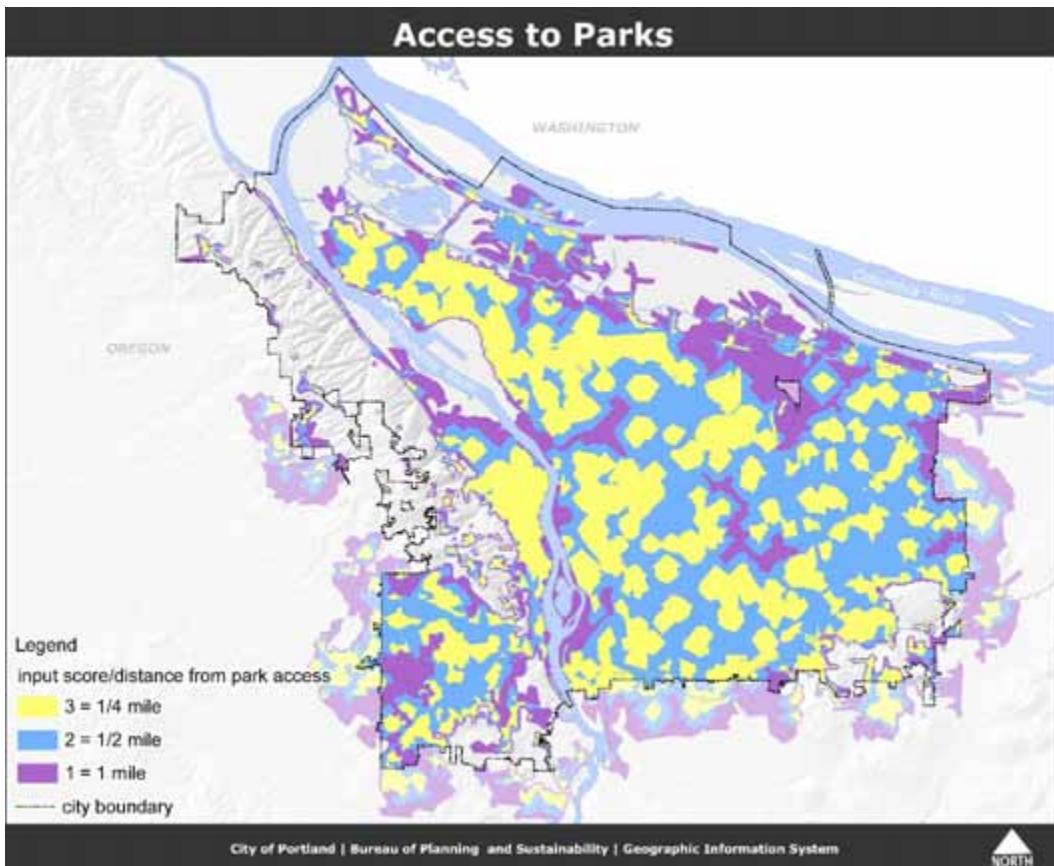
## Input Mapping



## Input Mapping (*continued*)

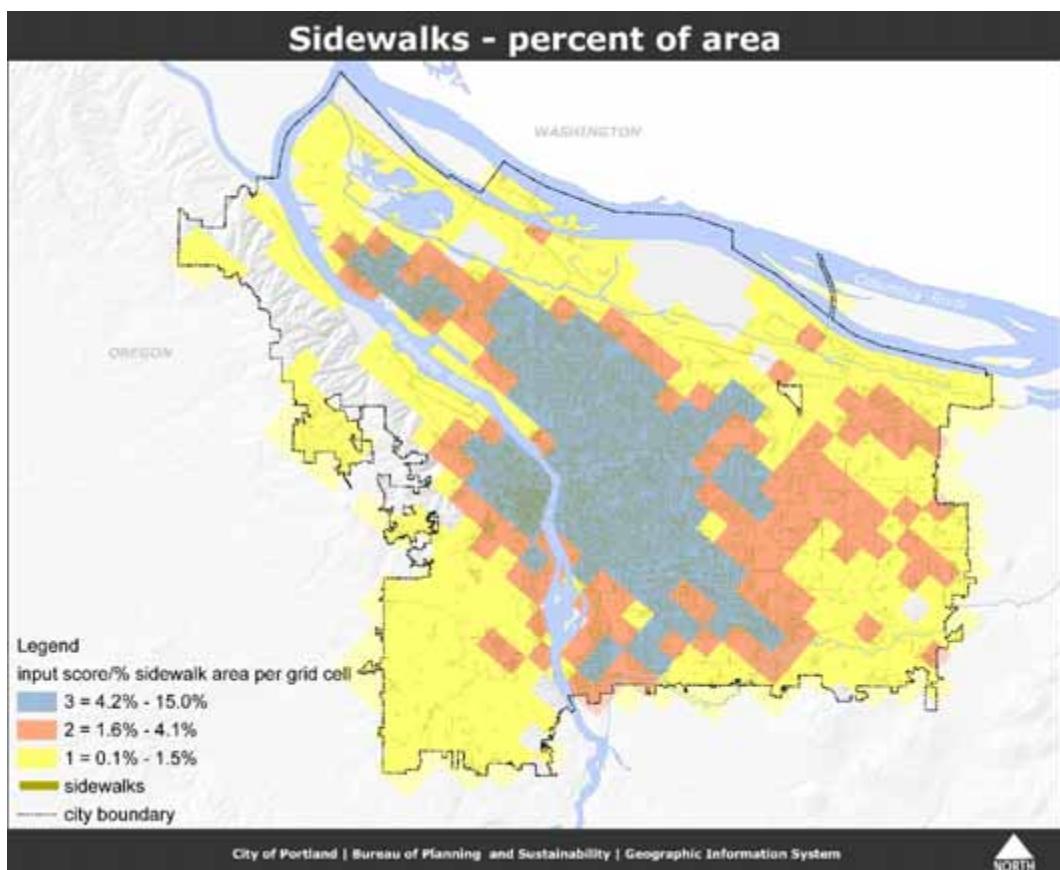
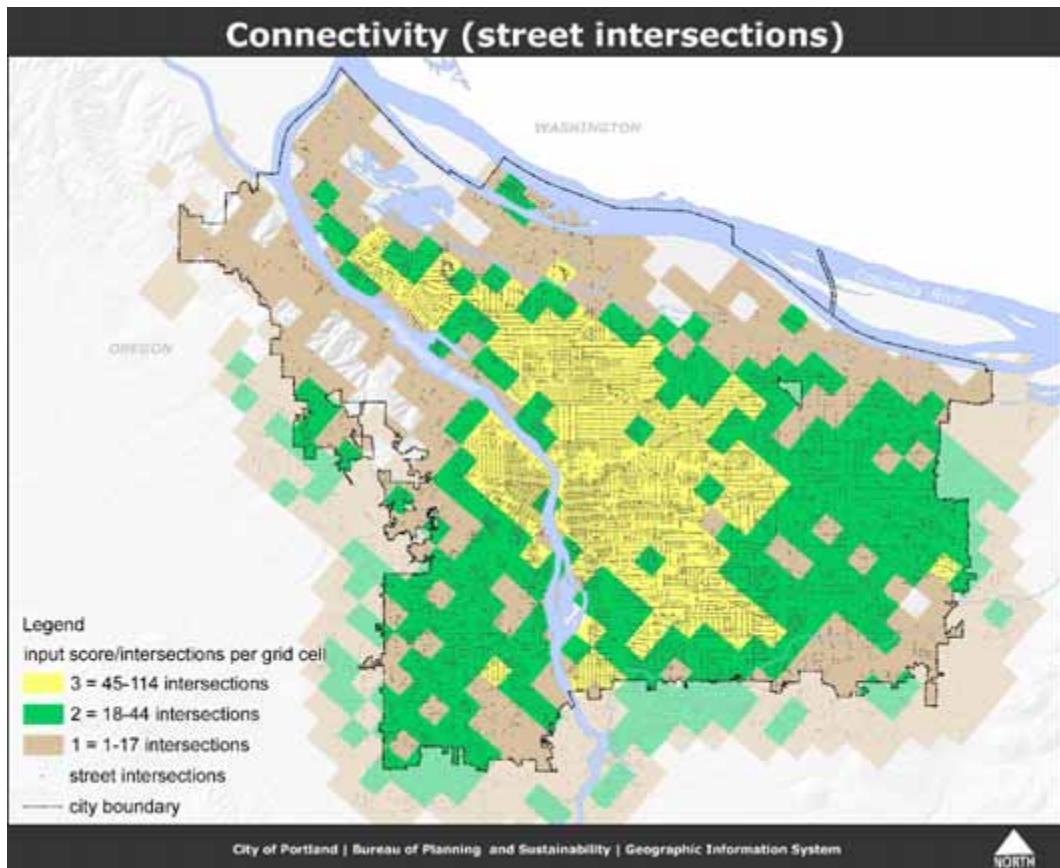


## Input Mapping (*continued*)

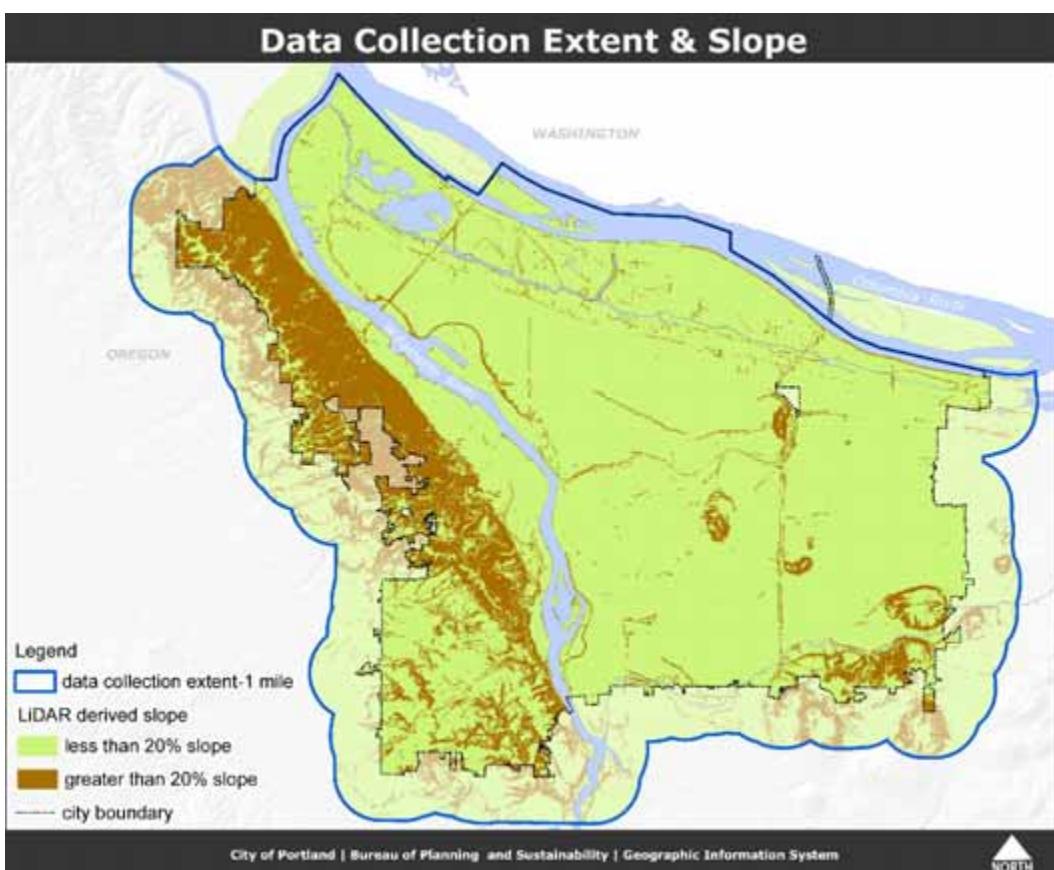
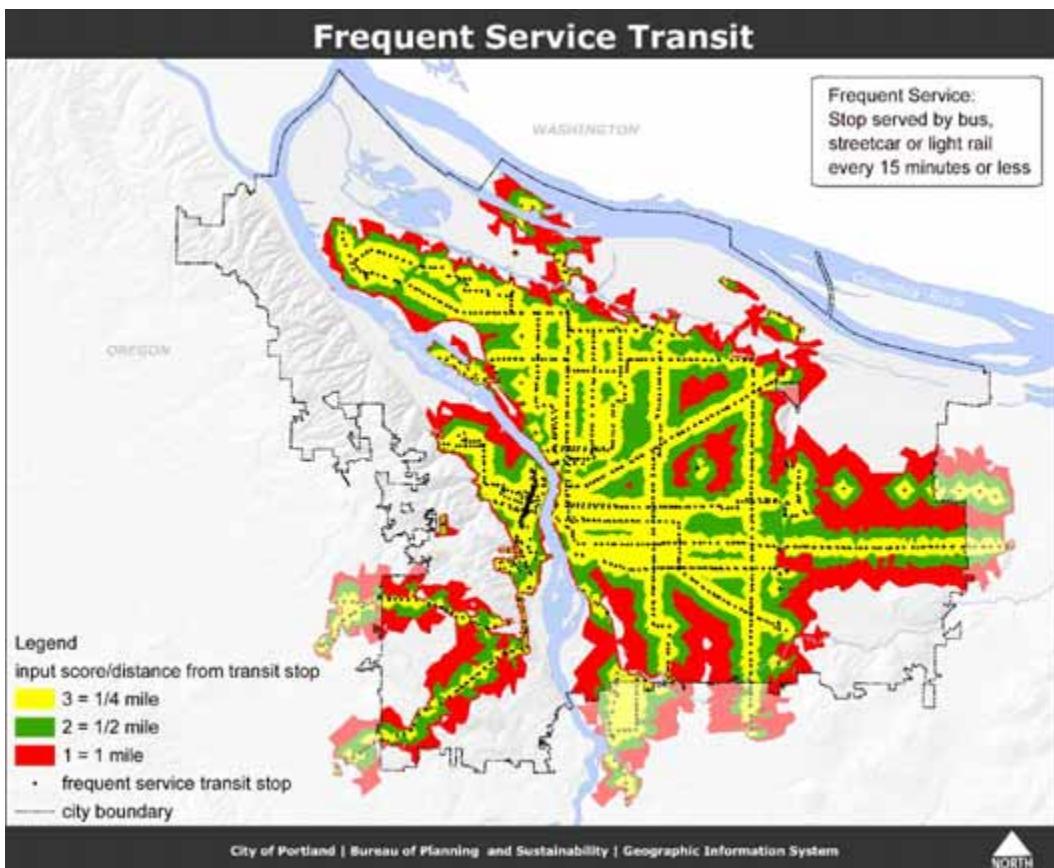


June 5, 2012

## Input Mapping (*continued*)



## Input Mapping (continued)



## Comments on Findings

The 20-minute neighborhood analysis mapping identified those areas of Portland that have attributes that contribute to walkable communities, as well as those areas that have less of these attributes. The analysis indicated that about 45 percent of Portlanders live in areas that are close to a broad range of services (businesses, grocery stores, parks, schools, frequent transit service) and that have street connections and pedestrian facilities that make walking safe and convenient. The areas with these attributes, yellow to white on the hot spots map, received at least 70 out of 100 points in an index used in the analysis to assess the relative presence of pedestrian-supportive characteristics across Portland.

The Central City and Inner neighborhoods (featuring main street commercial districts, sidewalks, and good street connectivity) were identified in the analysis as having the greatest degree of walkable access to destinations. Eastern and Western neighborhoods have less convenient access, with more dispersed neighborhood business districts that are beyond walking access for most residents, and a lack of sidewalks and street connectivity. Western neighborhoods have additional challenges to the ability to walk and bike to destinations resulting from hilly topography, ravines and stream corridors.

The majority of areas identified in the analysis mapping as hot spots are older, streetcar-era parts of the city, where the elements of a walkable neighborhoods were already reflected when the neighborhoods were created. Beyond these areas, fostering 20-minute neighborhoods will be more of a challenge. In some cases, there are existing centers of activity (Multnomah Village, Hillsdale or Gateway, for example) which could be strengthened. But the absence of sidewalks or lack of a finer grain of street connectivity, and the small proportion of population living close to services in some areas, are additional challenges that would need to be addressed in order to foster neighborhoods where residents have convenient walking or biking access to local services.



## Issues for Future Consideration

The 20-Minute Neighborhoods Analysis mapping indicates that the city has some areas that have the elements of a 20-minute neighborhood, but also many other areas that lack these elements. How can public policies and actions affect the factors (distance and access, destinations and density) necessary to support the evolution of 20-minute neighborhoods in more parts of the city? The following are additional questions, spurred by the analysis, that may merit future consideration.

### Distance and Design (ease of access):

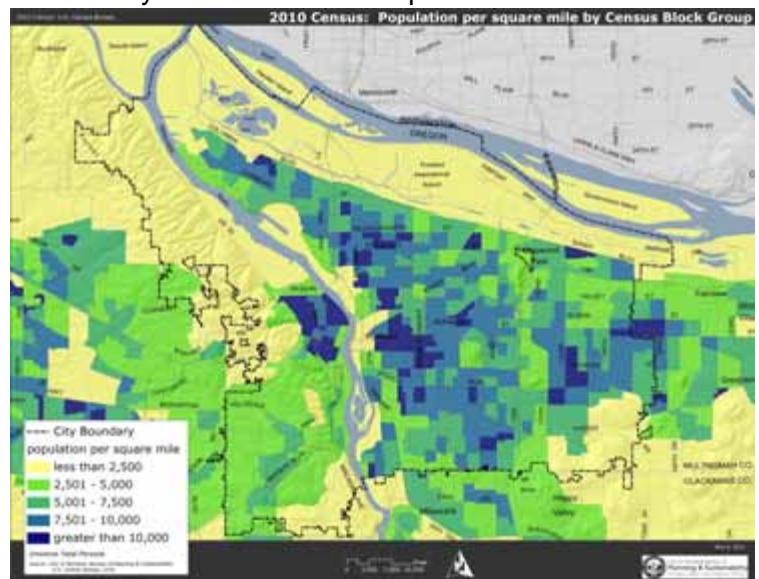
- What are options for sidewalk improvements and providing additional connections so that accessibility is improved?
- To what extent can bicycle and transit access expand the market area for neighborhood services, without increasing densities within walking distance?
- Can transit access to services function as a suitable replacement to having services available within walking distance?
- How can travel options be expanded in areas that lack the population to support concentrations of local commercial services or convenient transit service?

## Destinations:

- Do our policies and implementation approaches support the market for and development of local retail and other services, as well as walkable access to parks, natural areas and schools?
- Given that concentrations of destinations facilitate walking, bicycle and transit access, should a priority be placed on creating compact areas with concentrations of commercial and community services, instead of spreading them more broadly across the city?
- How do we ensure areas of the city are not underserved, basic needs are met, and have the appropriate commercial services for the community, particularly in areas with demographics that may not be conducive to private-sector investment?

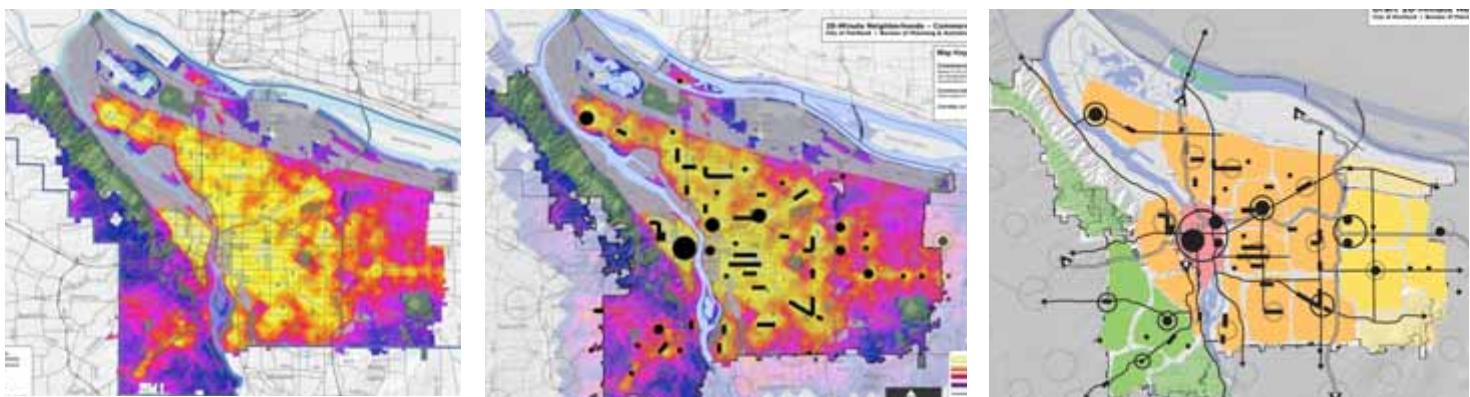
## Density:

- How do we locate and design for increased densities of residents in appropriate locations, and are there population thresholds that need to be met to support neighborhood retail and public services?
- If the Climate Action Plan objective for 90 percent of Portlanders to live in areas close enough to walk or bike to local services is to be met in 25 years, how much of this should involve focusing growth in areas that already have services and pedestrian-supportive infrastructure, versus focusing growth, development and infrastructure in areas that do not have them in order to transform them into walkable places?
- Are Portlanders willing to accept increased housing densities in their neighborhoods, if this is accompanied by more commercial and community services? (Note the correlations between this map showing population densities and the concentrations of commercial services shown in the input maps of this analysis.)



Finally, a topic to consider is whether some areas of the city are not appropriate places for 20-minute neighborhoods. That is the clear answer for some areas, especially single or exclusive use areas like the airport and marine terminals, the industrial sanctuaries and large natural areas like Forest Park. These areas are necessary in a city, but their value lies in their large area dedicated to a specific use. They should be connected to the system of 20-minute neighborhoods, but it is not desirable or practical to have them become 20-minute neighborhoods themselves.

There are also areas that are primarily residential, set among streams and forested hillsides or other areas of high environmental value, where the preservation and connectivity of natural resource features may be of such a priority that they should not be compromised by the density or access requirements of 20-minute neighborhoods. The fact that Portland is spread across 134 miles of land area also suggests that creating walkable places with concentrations of people and destinations will require focused growth, as Portland's existing and anticipated population is not large enough to support this everywhere within the foreseeable future.



## Introduction to Analysis Area Summaries: Services, Demographics and Market Characteristics

The 24 analysis area summaries in **Appendix A** of this report provide a greater level of detail, at a more localized level, of the range of commercial and community services in different parts of the city, and includes mapping showing the pedestrian, bicycle, transit infrastructure and natural features in each area. The summaries also include information on demographics, anticipated growth, and on retail market and employment indicators. All of this information is intended to support community discussion on local issues and opportunities related to overcoming barriers to fostering walkable communities that provide opportunities to meet needs locally.

The geographies of most of the analysis areas were based around existing neighborhood business districts that were at the cores of the 20-minute neighborhoods analysis hot spots. In general, the analysis areas were configured to include areas within roughly a mile of the core commercial areas, based on the key role of these neighborhood business districts in providing local access to services. Exceptions to this are three analysis areas that the 20-Minute Neighborhood Analysis did not identify as having walkable access to major concentrations of neighborhood commercial services (Forest Park-Northwest Hills, Tryon Creek-Riverdale, and Pleasant Valley). Note that the commercial hubs and the analysis area geographies and names used here are for analysis purposes only. They do not preclude the community's identification of other locations for neighborhood hubs or centers during the upcoming update of the Comprehensive Plan.

Each analysis area summary includes information on:

### 1. Services and Amenities

- Commercial districts
- Grocery stores
- Community centers
- Libraries
- Parks and open space
- Tree canopy coverage
- Public schools
- Colleges (campus)
- Hospitals
- Farmers markets
- Transit centers and light rail stations
- Walkable access score (from the 20-Minute Neighborhoods Analysis)
- Percentages of area population living within:
  - 1/2 mile of a park
  - 1/2 mile of a public elementary school
  - 3 miles of a full-service community center
  - 1/2 mile of a full-service grocery store
  - 1/4 mile of a frequent service transit stop
- Urban form characteristics
- Mixed-use areas
- Zoning
- Anticipated growth by 2035

## 2. Maps

- Comprehensive Plan designations (zoning)
- Services and amenities (besides most items listed above, also identifies locations of community gardens, places of worship, county health clinics and aging services, preschools and daycare centers)
- Transit infrastructure (including existing and planned light rail lines)
- Sidewalks and bicycle infrastructure
- Watersheds, natural features and stormwater systems

## 3. Demographics (2000 – 2010)

*(Charts include comparative information for each analysis areas, Portland as a whole, and the metro area)*

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>▪ Population</li> <li>▪ Median age</li> <li>▪ Age distribution</li> <li>▪ Average household size</li> <li>▪ Percent of households with children</li> <li>▪ Diversity</li> <li>▪ Race and ethnic distribution</li> </ul> | <ul style="list-style-type: none"> <li>▪ Median household income</li> <li>▪ Percent below poverty</li> <li>▪ Percent college graduates</li> <li>▪ Median home value</li> <li>▪ Percent renters of occupied housing units</li> </ul> |
|--|---|

## 4. Commercial Real Estate Indicators

- Retail and office space
- Retail and office vacancy
- Retail and office rents
- Retail market profile

*Note: The retail market profile shows the estimated retail spending of analysis area residents, based on population and demographic characteristics, compared to the retail sales and types of retail in the area. “Leakage” indicates the estimated amount of residents’ spending that is spent outside the area – leakage is indicated by a positive retail gap number. “Surplus” indicates the amount of estimated retail sales in the area that is in excess of what could be attributed to area residents, reflecting that the area is attracting shoppers from outside the analysis area – surplus is indicated by a negative number (demand – supply = retail gap).*

## 5. Employment

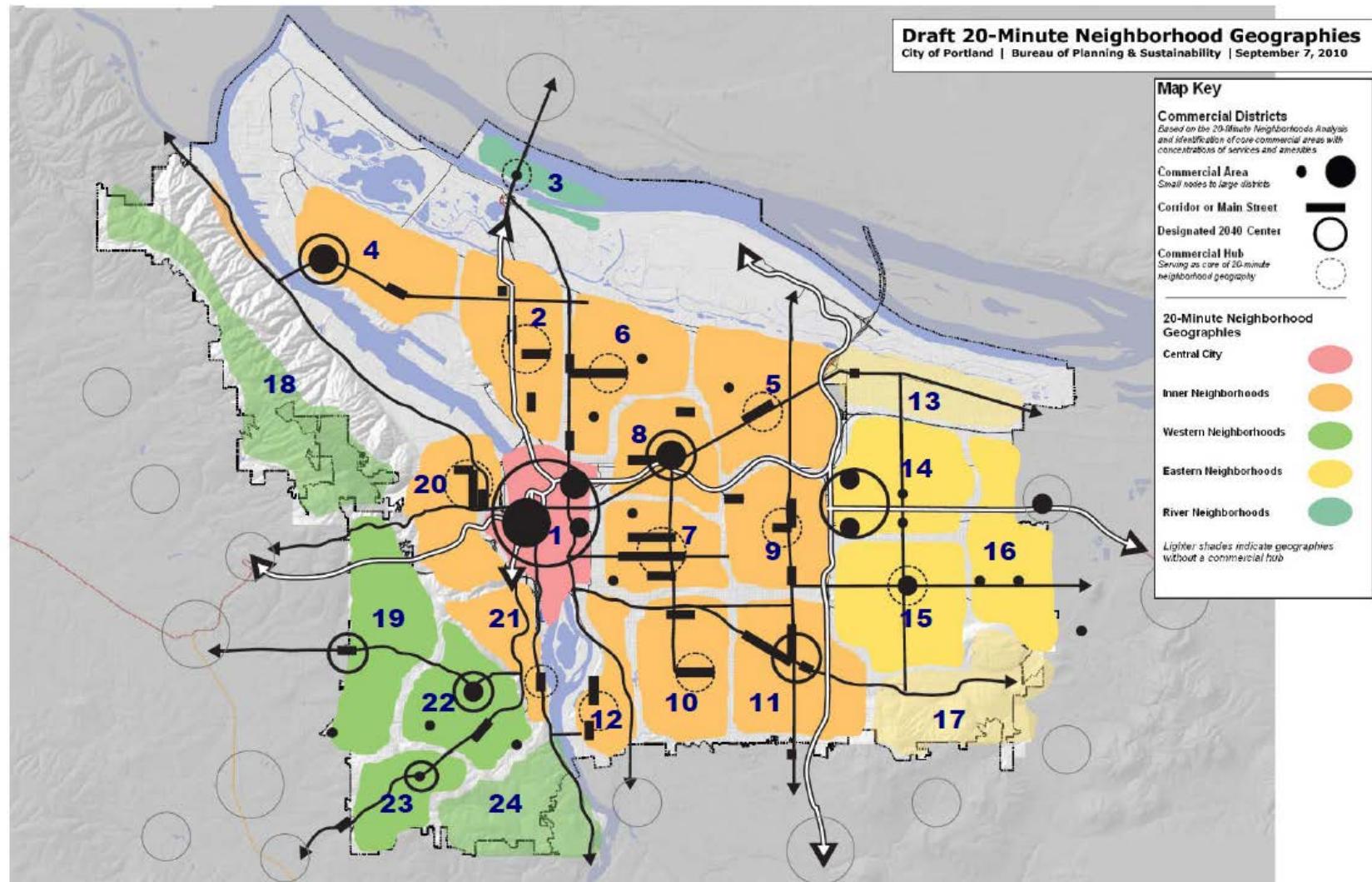
- Numbers and types of jobs
- Numbers and types of firms
- Average annual wages, by type of job

*Note: Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations. At the scale of the analysis area geographies, major shifts in numbers of jobs can sometimes be the result of a large firm or public agency’s change of administrative office address.*

## Access to Services and Amenities and Demographics Summaries

For comparison purposes and as a guide to the analysis area geographies, the map and table on the following two pages present summary information on local access to services (mostly related to destinations used in the 20-Minute Neighborhoods Analysis) within each of the analysis areas. The table also summarizes each analysis area’s averaged walkability score (from the 20-Minute Neighborhoods Analysis index), and provides comparative figures on park acreage, tree canopy coverage, and population. This is followed by a summary of analysis area demographics.

# 20-Minute Neighborhood Analysis Areas Access to services and amenities summary



## Access to Services and Amenities Summary

20-Minute Analysis Area	Walkability score	Park acreage	Tree canopy coverage	People per square mile	Population	% within 1/2 mile of grocery store	% within 1/2 mile of park	% within 3 miles of full-service community center	% within 1/2 mile of elementary school	% within 1/4 mile of frequent transit
1 Central City	70	92	10%	8,000	30,900	64%	96%	95%	2%	70%
2 Interstate Corridor	63	90	23%	7,100	33,600	16%	97%	100%	58%	74%
3 Hayden Island-Bridgeton	26	30	18%	2,100	4,200	7%	29%	34%	0%	3%
4 St. Johns	43	229	22%	7,600	32,500	14%	91%	100%	45%	65%
5 Roseway-Cully	46	341	19%	5,900	34,300	17%	73%	72%	34%	47%
6 MLK-Alberta	65	139	18%	8,000	33,700	41%	98%	98%	49%	81%
7 Belmont-Hawthorne-Division	79	95	23%	10,100	36,900	59%	100%	68%	53%	87%
8 Hollywood	70	40	22%	8,000	34,200	57%	83%	100%	49%	60%
9 Montavilla	63	209	22%	7,200	31,600	34%	82%	100%	40%	49%
10 Woodstock	61	233	25%	6,700	31,300	46%	100%	96%	51%	40%
11 Lents-Foster	57	213	20%	7,000	43,900	32%	91%	100%	42%	43%
12 Sellwood-Moreland-Brooklyn	55	309	23%	5,400	15,300	47%	95%	0%	29%	16%
13 Parkrose-Argay	32	89	17%	6,000	13,800	0%	82%	11%	25%	1%
14 Gateway	48	296	22%	5,500	30,100	27%	97%	98%	24%	12%
15 122nd-Division	47	131	26%	7,600	38,700	18%	99%	91%	33%	17%
16 Centennial-Glenfair-Wilkes	46	87	24%	7,100	31,100	20%	81%	31%	23%	18%
17 Pleasant Valley	15	1301	53%	2,300	11,800	0%	62%	26%	11%	0%
18 Forest Park-Northwest Hills	7	5417	81%	500	8,400	0%	11%	5%	7%	0%
19 Raleigh Hills	22	120	52%	3,000	16,300	18%	56%	89%	12%	7%
20 Northwest	39*	722	53%	5,400	21,900	60%	73%	75%	56%	50%
21 South Portland-Marquam Hill	31	396	56%	3,400	8,400	8%	61%	22%	0%	18%
22 Hillsdale-Multnomah-Barbur	40	192	40%	4,600	19,800	21%	77%	100%	17%	5%
23 West Portland	35	84	42%	4,200	10,800	13%	83%	94%	19%	15%
24 Tryon Creek-Riverdale	15	532	67%	1,900	9,700	4%	19%	26%	7%	0%

Numbers approximate only, as analysis areas do not entirely correspond to census block boundaries.

Source: US Census 2010, American Community Survey 2005-2009, ESRI Business Analyst - 05/19/2011

\*Score for "flats" portion of analysis area [primarily the NW District] is 73. Score for hillside areas is 22.

## Demographics Summary

20-Minute Analysis Area	Population	Households	Employees	Land Area (sq. mi.)	Activity Density		Residential Density	Diversity Index	Median Household Income	Median Home Value	Percent Renters
					(employees + population per sq. mi.)	(population per sq. mi.)					
Metropolitan Statistical Area	2,226,000	925,000	1,050,000	6,683	490	330	48	\$62,000	\$242,100	34%	
Portland City	584,000	266,000	376,000	120	8,000	4,870	55	\$54,000	\$224,900	42%	
<b>1</b> Central City	30,931	21,726	131,083	3.9	41,500	7,930	50	\$28,000	\$400,000	72%	
<b>2</b> Interstate Corridor	33,636	14,318	19,085	4.7	11,200	7,160	73	\$50,000	\$197,000	37%	
<b>3</b> Hayden Island-Bridgeton	4,223	2,501	5,221	2	4,700	2,110	35	\$55,000	\$80,000	15%	
<b>4</b> St. Johns	33,462	11,975	7,052	4.3	9,400	7,780	72	\$51,000	\$192,000	40%	
<b>5</b> Roseway-Cully	34,273	13,865	11,094	5.8	7,800	5,910	65	\$59,000	\$224,000	31%	
<b>6</b> MLK-Alberta	33,693	13,872	13,789	4.2	11,300	8,020	72	\$54,000	\$263,000	37%	
<b>7</b> Belmont-Hawthorne-Division	36,907	18,579	12,554	3.7	13,400	9,970	39	\$54,000	\$303,000	53%	
<b>8</b> Hollywood	30,699	14,732	21,489	3.9	13,400	7,870	34	\$65,000	\$369,000	39%	
<b>9</b> Montavilla	31,581	14,003	6,129	4.4	8,600	7,180	53	\$56,000	\$227,000	38%	
<b>10</b> Woodstock	31,266	13,802	8,873	4.6	8,700	6,800	43	\$55,000	\$247,000	39%	
<b>11</b> Lents-Foster	43,891	17,796	7,076	6.3	8,100	6,970	58	\$51,000	\$191,000	37%	
<b>12</b> Sellwood-Moreland-Brooklyn	15,349	7,851	10,660	2.9	9,000	5,290	33	\$53,000	\$284,000	48%	
<b>13</b> Parkrose-Argay	13,753	5,365	10,477	2.3	10,500	5,980	65	\$52,000	\$270,000	37%	
<b>14</b> Gateway	30,143	11,842	12,905	5.5	7,800	5,480	54	\$53,000	\$229,000	39%	
<b>15</b> 122nd-Division	38,653	12,987	5,998	5.1	8,800	7,580	58	\$53,000	\$208,000	37%	
<b>16</b> Centennial-Glenfair-Wilkes	31,343	12,135	3,563	4.5	7,800	6,970	59	\$52,000	\$230,000	36%	
<b>17</b> Pleasant Valley	11,809	3,945	887	5.2	2,400	2,270	37	\$71,000	\$303,000	20%	
<b>18</b> Forest Park-Northwest Hills	8,424	3,472	4,076	15.9	800	530	28	\$125,000	\$656,000	13%	
<b>19</b> Raleigh Hills	15,446	6,849	3,699	5.2	3,700	2,970	28	\$79,000	\$392,000	24%	
<b>20</b> Northwest	21,794	14,026	21,877	4	10,900	5,450	30	\$52,000	\$636,000	63%	
<b>21</b> South Portland-Marquam Hill	8,560	5,119	47,618	2.5	22,500	3,420	31	\$62,000	\$429,000	49%	
<b>22</b> Hillsdale-Multnomah-Barbur	19,601	9,471	5,725	4.3	5,900	4,560	35	\$64,000	\$343,000	36%	
<b>23</b> West Portland	10,836	4,868	3,626	2.6	5,600	4,170	41	\$70,000	\$319,000	31%	
<b>24</b> Tryon Creek-Riverdale	9,668	3,609	1,546	5.1	2,200	1,900	25	\$99,000	\$441,000	14%	

**Numbers should be used with care as shapes in no way correspond to block boundaries.**

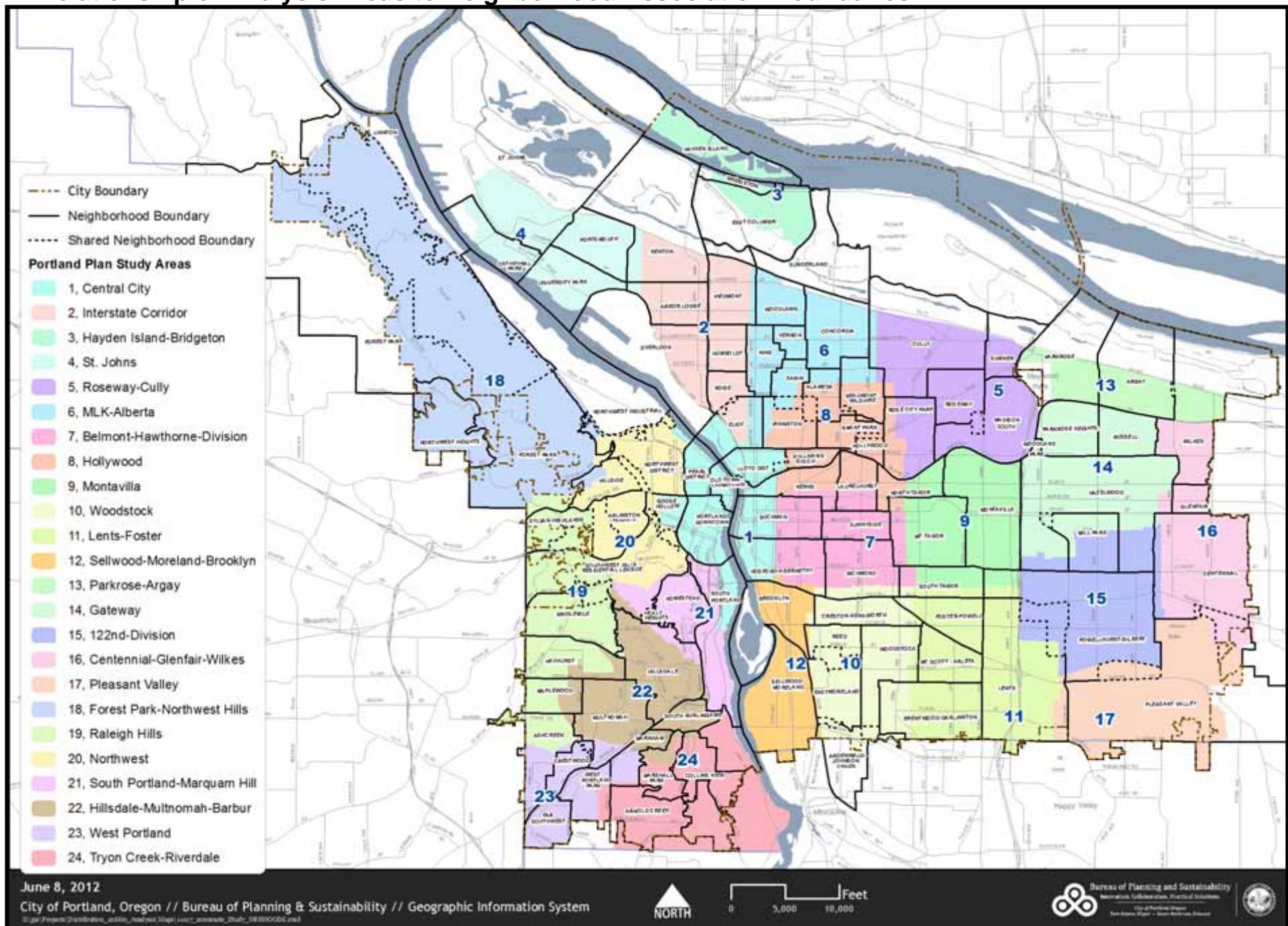
**Rounded percentages should be used only as a general guide; decimal places provided in this form to show difference between <1% and 0%.**

Source: US Census 2010, American Community Survey 2005-2009, ESRI Business Analyst -- 05/19/2011

Note: Some data is rounded for ease of readability. Also, some data are estimates based on best available data from the U.S. Census.

## Relationship of Analysis Areas to Neighborhood Association Boundaries

June 5, 2012

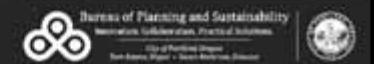


June 8, 2012

City of Portland, Oregon // Bureau of Planning & Sustainability // Geographic Information System  
2010 Project Distribution and Analysis Map - Portland Plan Study Areas



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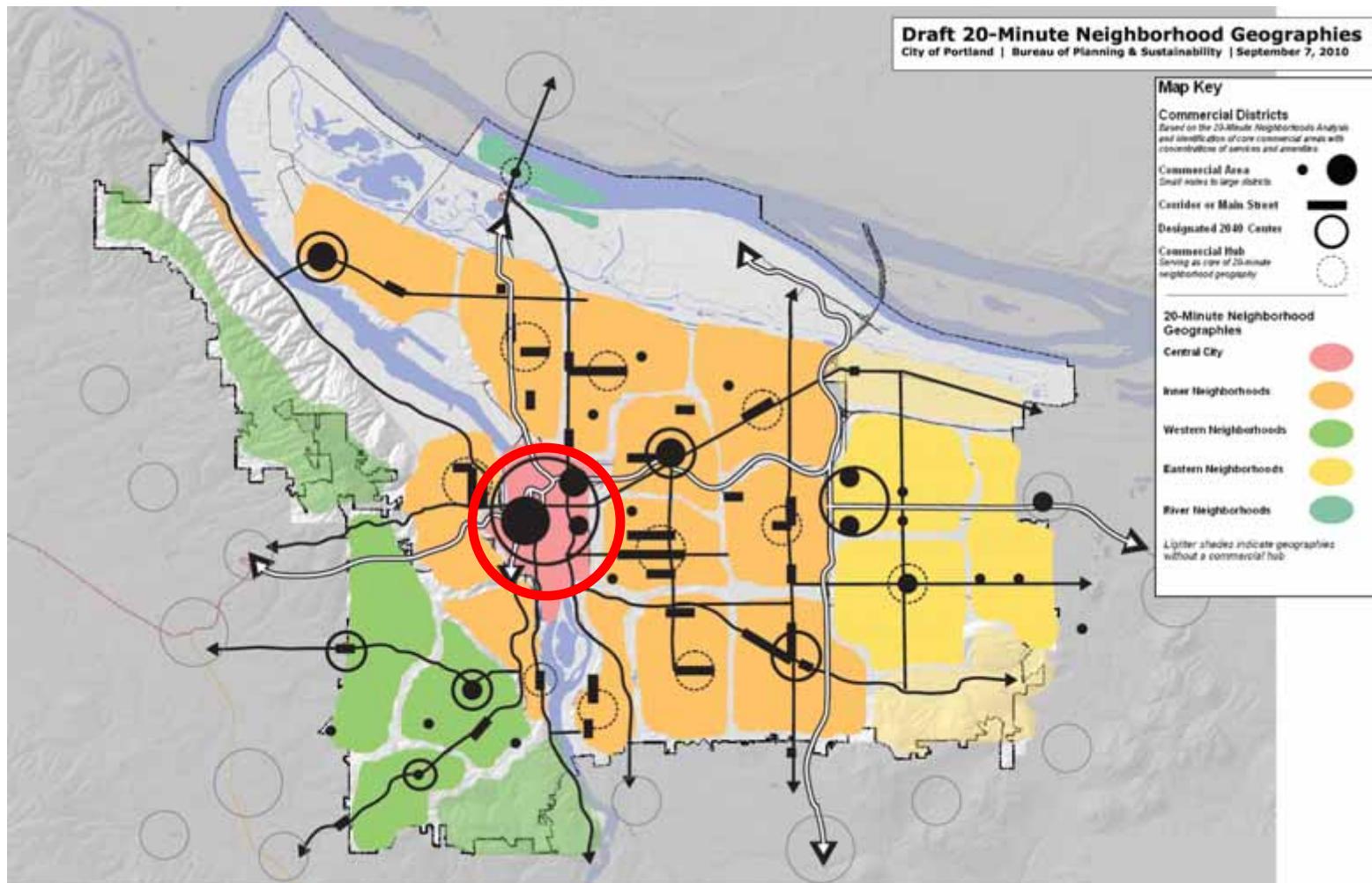
## Appendix A: Analysis Area Summaries

- 1 Central City
- 2 Interstate Corridor
- 3 Hayden Island-Bridgeton
- 4 St. Johns
- 5 Roseway-Cully
- 6 MLK-Alberta
- 7 Belmont-Hawthorne-Division
- 8 Hollywood
- 9 Montavilla
- 10 Woodstock
- 11 Lents-Foster
- 12 Sellwood-Moreland-Brooklyn
- 13 Parkrose-Argay
- 14 Gateway
- 15 122nd-Division
- 16 Centennial-Glenfair-Wilkes
- 17 Pleasant Valley
- 18 Forest Park-Northwest Hills
- 19 Raleigh Hills
- 20 Northwest
- 21 South Portland-Marquam Hill
- 22 Hillsdale-Multnomah-Barbur
- 23 West Portland
- 24 Tryon Creek-Riverdale

## Central City Analysis Area

*Including the Downtown, Pearl, Old Town / Chinatown, Lloyd neighborhoods, and parts of the South Portland, Goose Hollow, Eliot, Kerns, Buckman and Hosford-Abernethy neighborhoods*

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# Central City Analysis Area

## Services and Amenities

*Population: 30,900 people (18,400 households)  
Land Area: 3.9 square miles (8,000 people per sq. mile)*

### Commercial Districts

The Central City includes Portland's largest concentration of retail and other commercial service, located throughout non-industrial portions of the area. The Central City's most significant retail centers include the Downtown retail core, the Lloyd Center Mall, and the Brewery Blocks area of the Pearl District.

**Grocery stores:** 7 (1 store per 2,629 households)

**Retail gap:** \$1.4 billion surplus (*amount of estimated yearly retail sales that is beyond what the analysis area population be expected to support, indicating the regional market of the area's retail*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	96%
Within 1/2 mile of a public elementary school:	2%
Within 3 miles of a full-service community center*:	95%
Within 1/2 mile of a full-service grocery store:	64%
Within 1/4 mile of a frequent service transit stop:	70%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** 1 (Central Library)

**Parks and Open Spaces:** 92 acres - including Governor Tom McCall Waterfront Park, South Waterfront Park, Pioneer Courthouse Square, the South and North Park Blocks, Jamison Square, and Holladay Park.

**Tree Canopy Coverage:** 10%

**Public Schools:** 1 high school (Lincoln [Benson located adjacent to northeastern boundary of analysis area])

No K-8 schools (Abernethy and Buckman Arts elementary schools located adjacent to eastern boundary of analysis area)

**Colleges (campus):** 3 (Portland State University, Pacific Northwest College of Art, Oregon Health & Science University)

**Hospitals:** None (Located nearby on Marquam Hill are Oregon Health & Science University, and Doernbecher Children's, Shriners, and Veterans hospitals. Legacy Emanuel Hospital adjacent to northeast boundary.)

**Farmers Markets:** 4 (Portland Farmers Markets at Portland State University, Shemanski Park and Pioneer Courthouse Square, and Lloyd Farmers Market)

**Transit Centers/Stations:** 2 Transit Centers (Portland Transit Mall, Rose Quarter Transit Center) and 31 light rail stations

**Walkable Access Score:** 70 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Downtown, Pearl, Old Town / Chinatown, Lloyd neighborhoods, and parts of South Portland, Goose Hollow, Eliot, Kerns, Buckman and Hosford-Abernethy

**Business Associations:** Goose Hollow, Old Town China Town, and Pearl District business associations, Lloyd District Community Association, Portland Business Alliance, and Central Eastside Industrial Council

## Urban Form Characteristics

The Central City is Portland's most intensely urbanized area, with its largest concentration of tall buildings, high-density residential development, jobs and cultural institutions, and includes large amounts of retail and other commercial services. The area features a highly interconnected pedestrian system, with a street structure shaped by small 200' by 200' blocks. An exception to this is the Lloyd District, which includes large superblocks. The Central City is located at the center of the region's transit system, and it includes an extensive system of urban parks. The downtown core is edged by natural and built boundaries, including the Willamette River and the I-405 Freeway.

**Access issues.** Excellent street and sidewalk connectivity. Excellent access to transit and to commercial and community services, an exception being the lack of a neighborhood elementary school.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Center:	2,450 acres (Central City)
Main Streets:	4.3 miles (Burnside, NE Martin Luther King Jr. Blvd, Belmont, Hawthorne, Division)
Station Communities:	21

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	2	.1%	.3
Multi-Family Residential:	144	10%	34
Commercial/Mixed-Use:	890	60%	321
Employment:	35	2%	12
Industrial:	341	23%	14
Open Space:	67	5%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

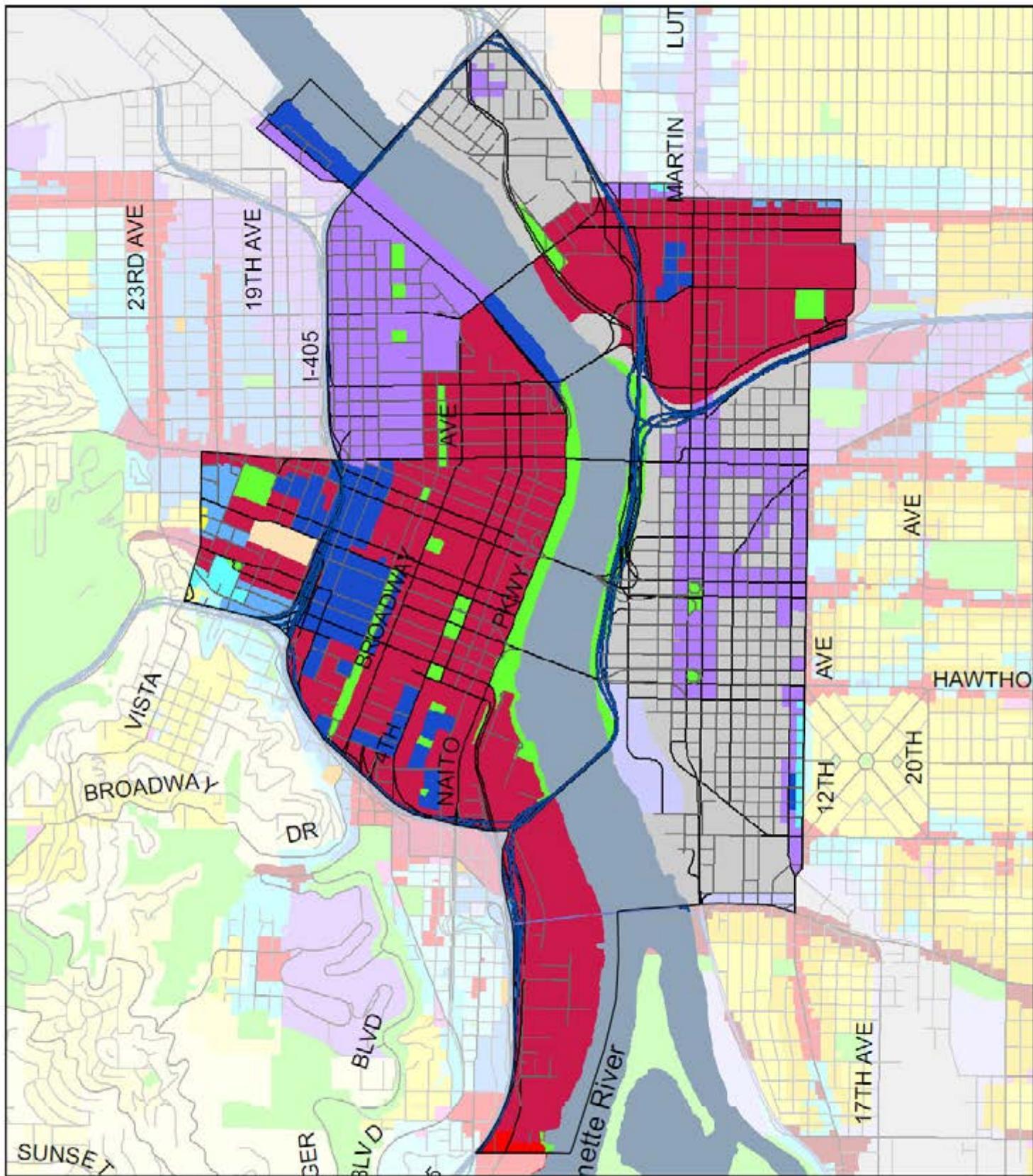
2010 Housing Units (Census):	21,821
2035 Housing Units:	45,900

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Central City Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet



Bureau of Planning and Sustainability

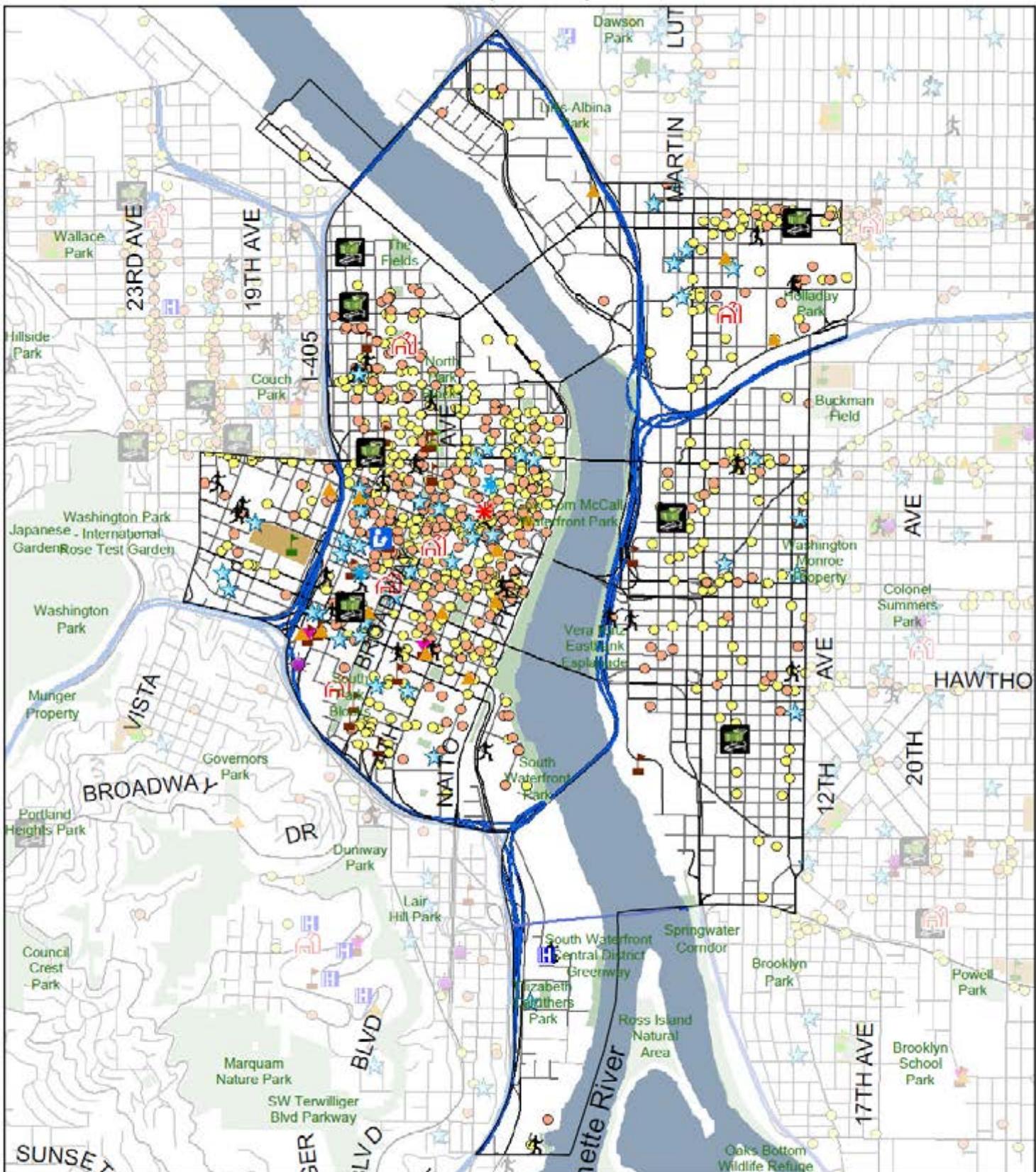
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City of Portland, Oregon

Jean Adams, Mayor • Jason Antonio, Director

# Central City Analysis Area



## Services and Amenities

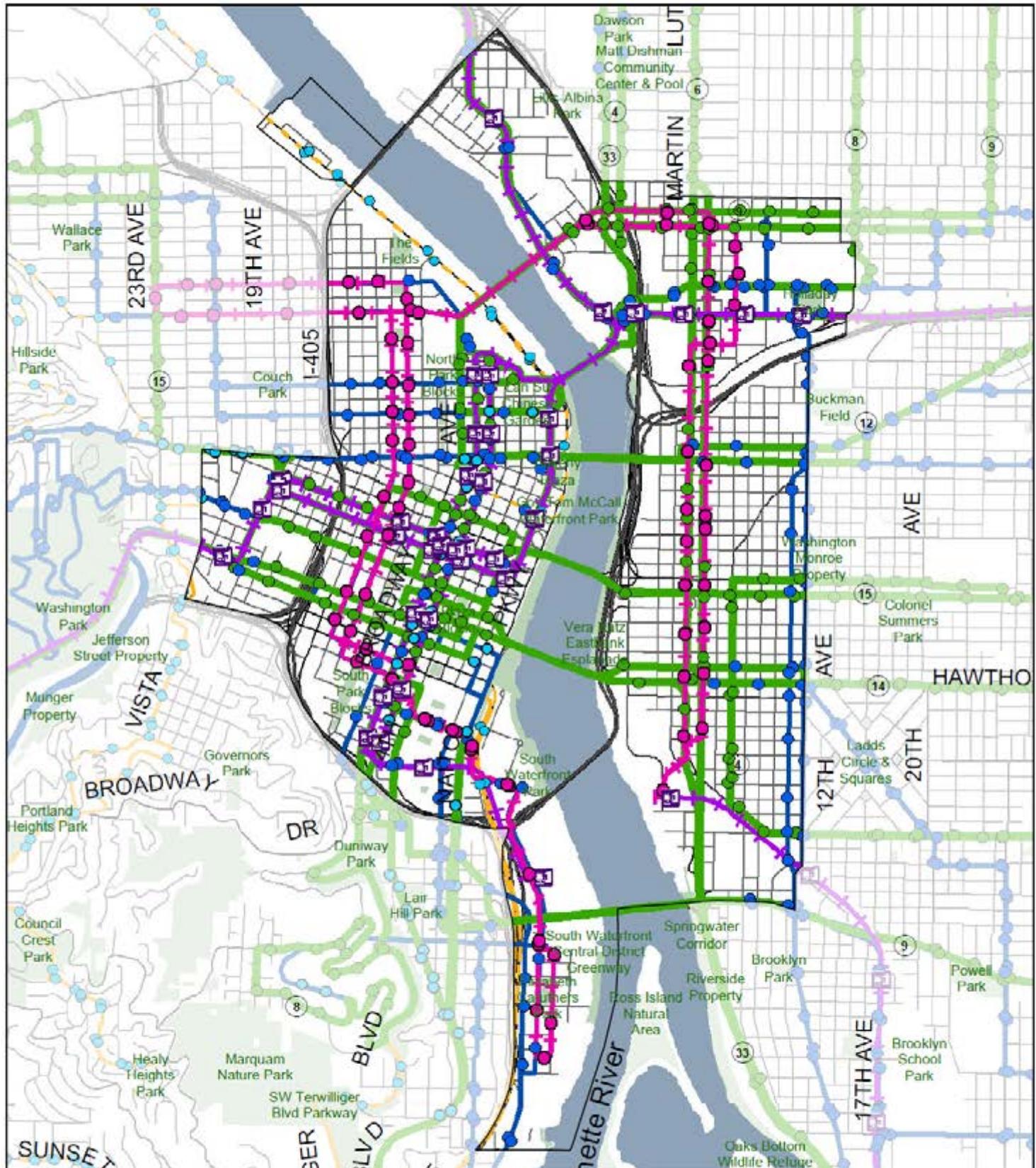
August 9, 2011  
commercial data: InfoUSA 2008



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City of Portland, Oregon  
Sam Adams, Mayor - Diane Altonen, Director

# Central City Analysis Area



## Transit Infrastructure

February 1, 2012

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- |                         |                          |
|-------------------------|--------------------------|
| <b>Light Rail Stops</b> | <b>Bus Stops</b>         |
| ■ MAX                   | ● Frequent Stops         |
| ● Street Car            | ● Standard Stops         |
| ■ MAX                   | ● Rush Hour Stops        |
| ■ Streetcar             | ■ Frequent Service       |
|                         | ■ Standard Service       |
|                         | ■ Rush Hour Only Service |
|                         | — City Boundary          |



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Feet

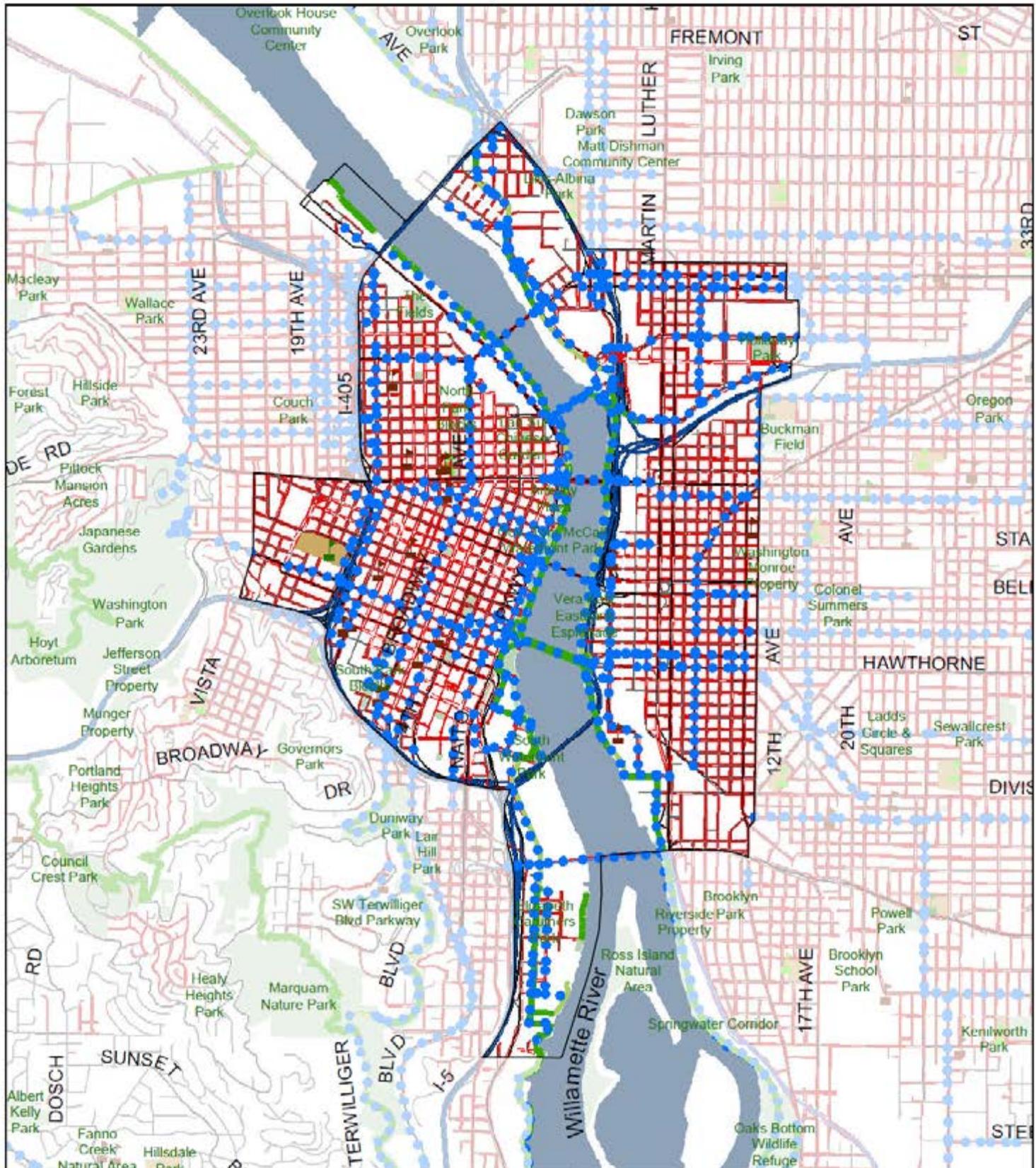


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John Adams, Mayor • Jason Anderson, Director

# Central City Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000  
Feet

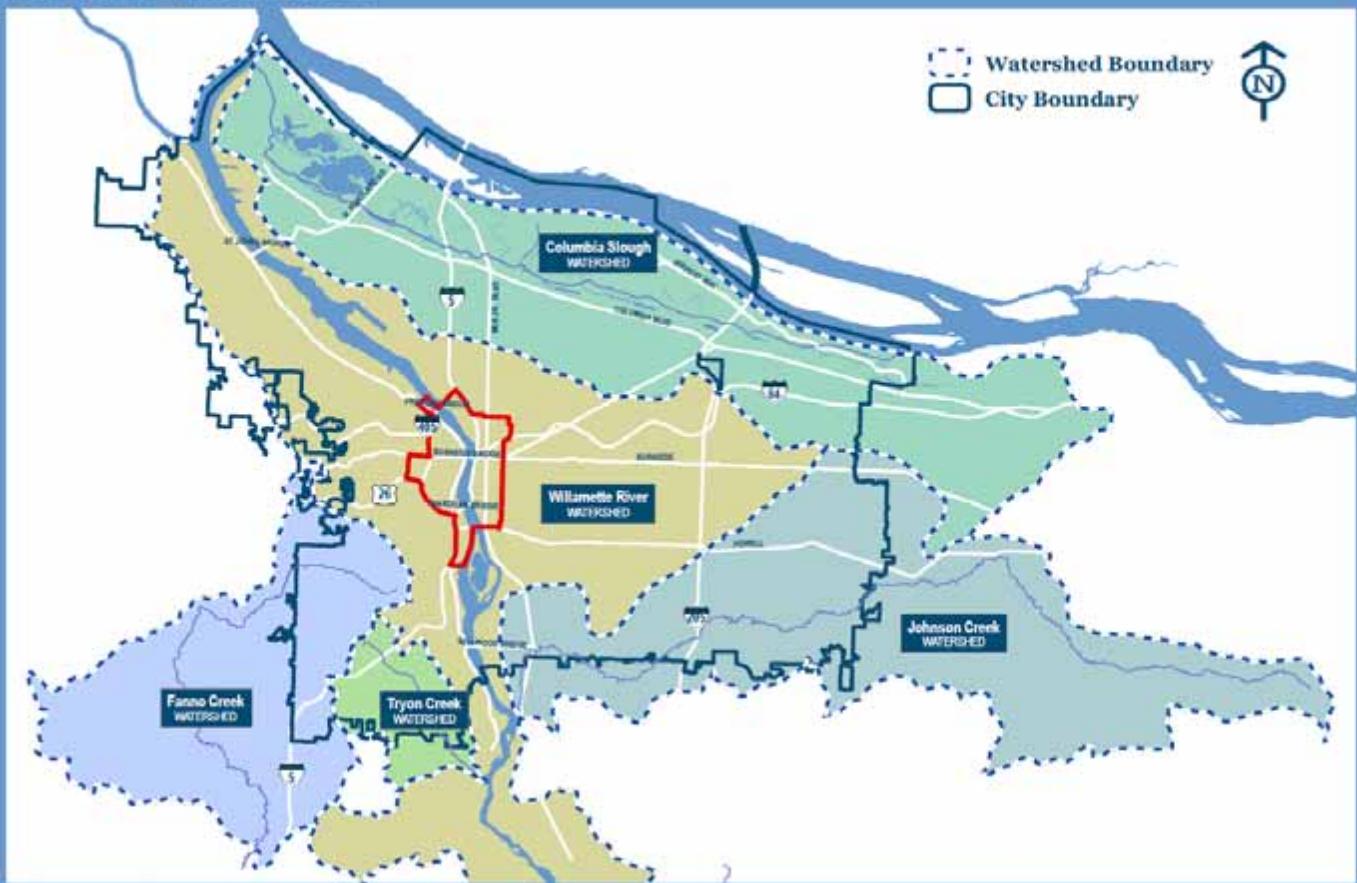


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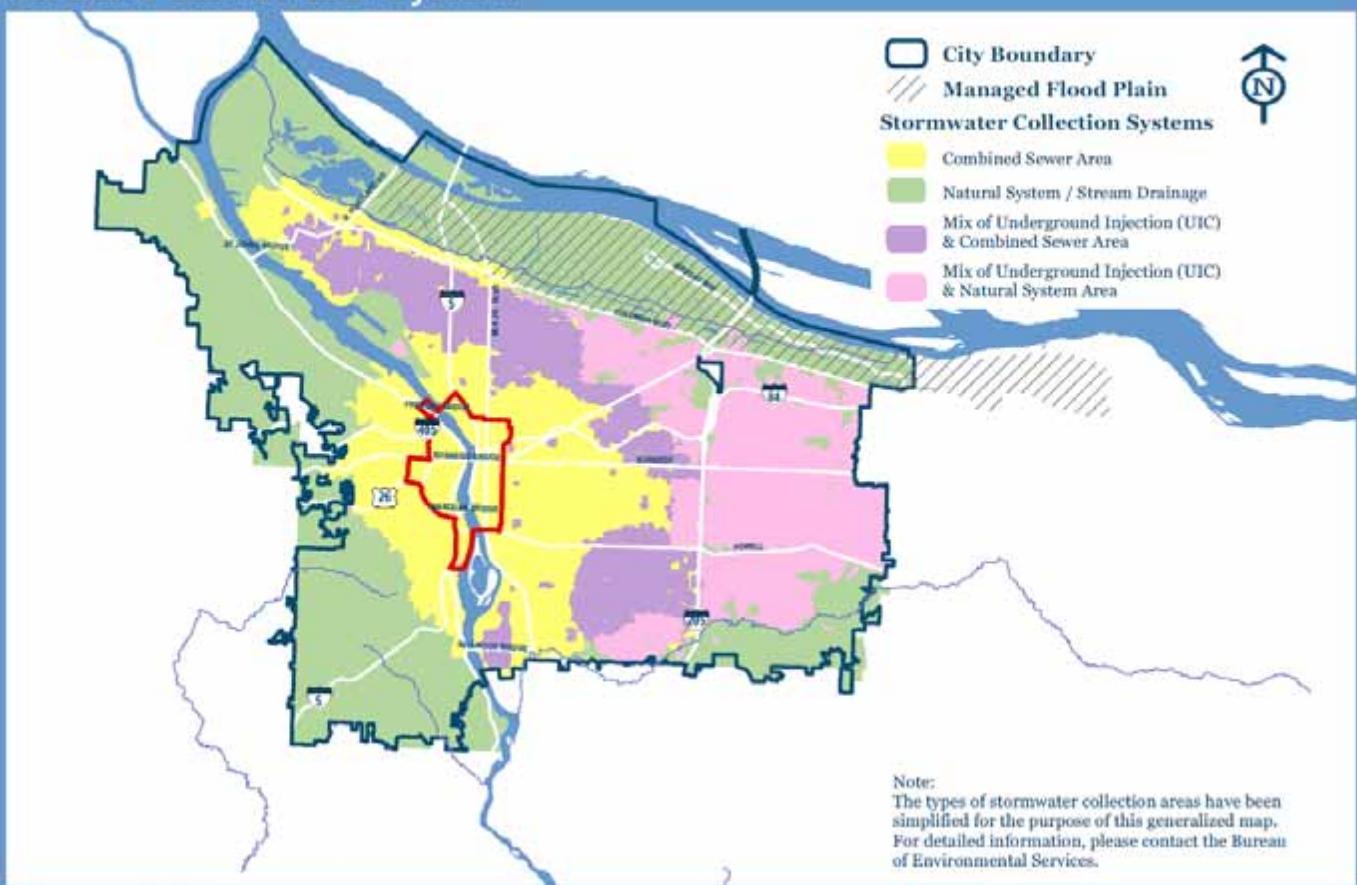


City of Portland, Oregon  
Steve Adlesic, Mayor • Sam Adams, Director

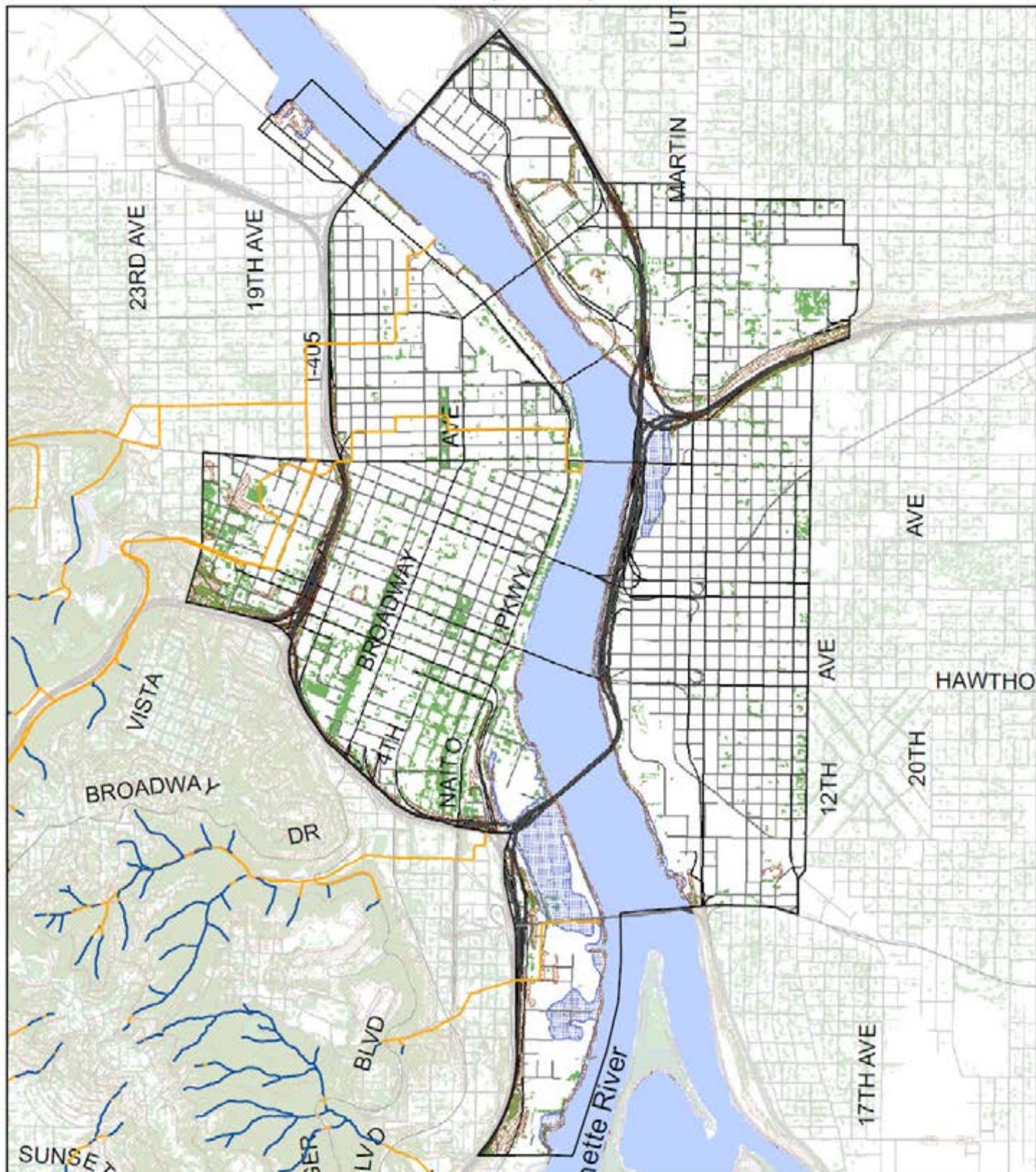
## Portland Watersheds



## Portland Stormwater System



# Central City Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



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City of Portland, Oregon  
Matt Adkins, Mayor • Nathan Alderson, Director

# Central City Analysis Area Demographics (2000 – 2010)

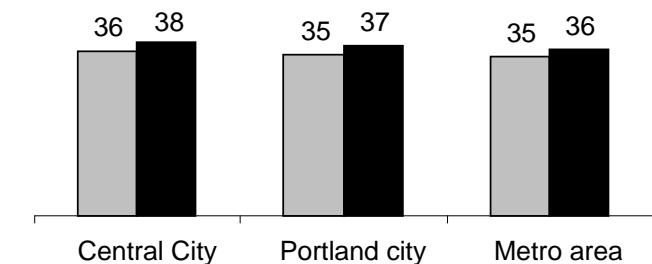
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

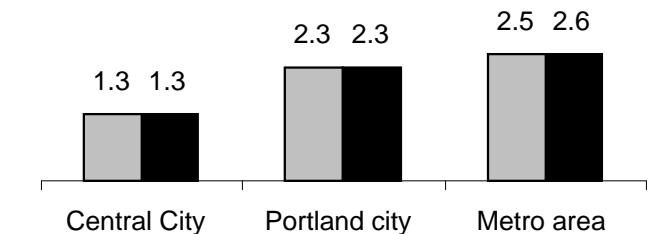
	Central City	Portland city	Metro area
2010	30,931	583,776	2,226,009
2000	19,202	529,121	1,927,881
% change	61%	10%	15%

■ 2000 ■ 2010

## Median Age

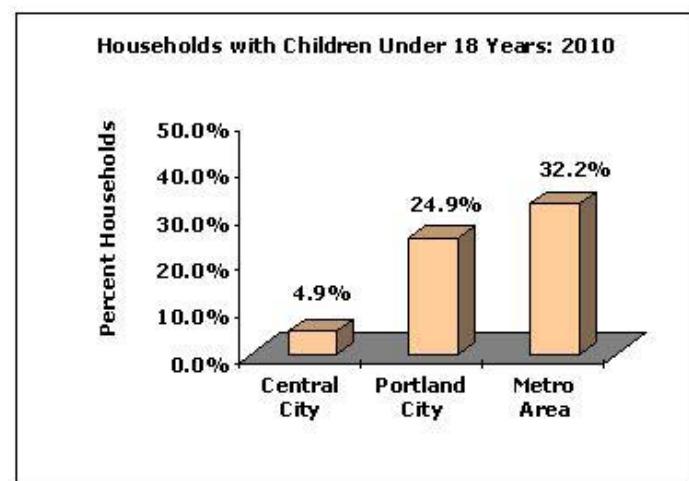
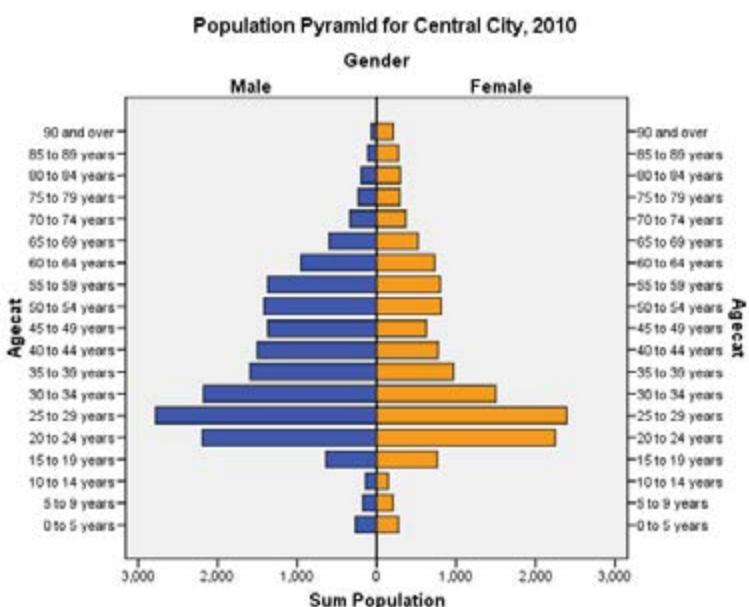
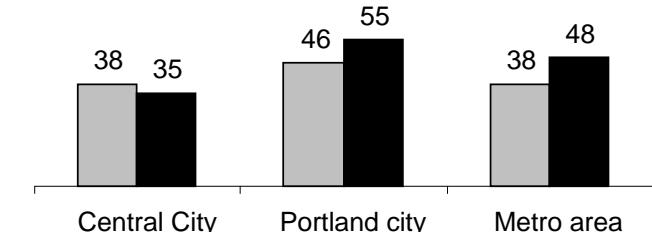


## Average Household Size

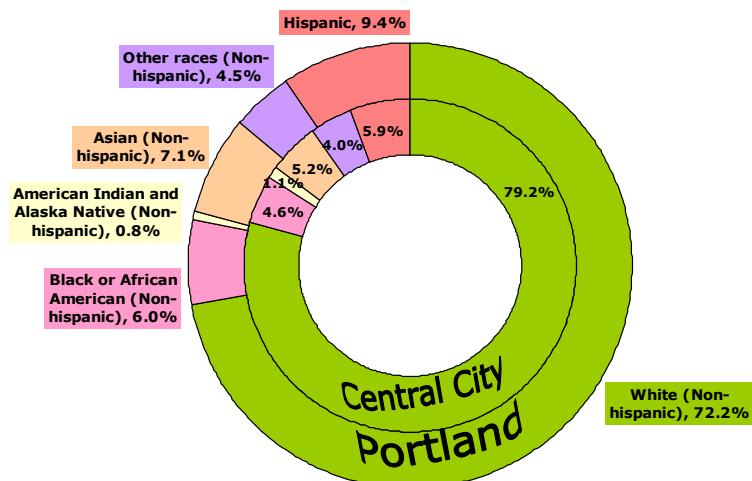


## Diversity Index

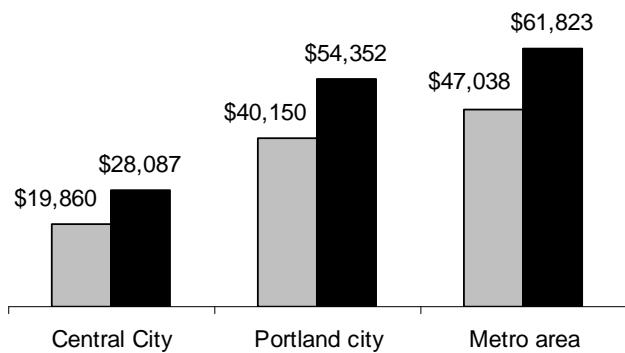
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



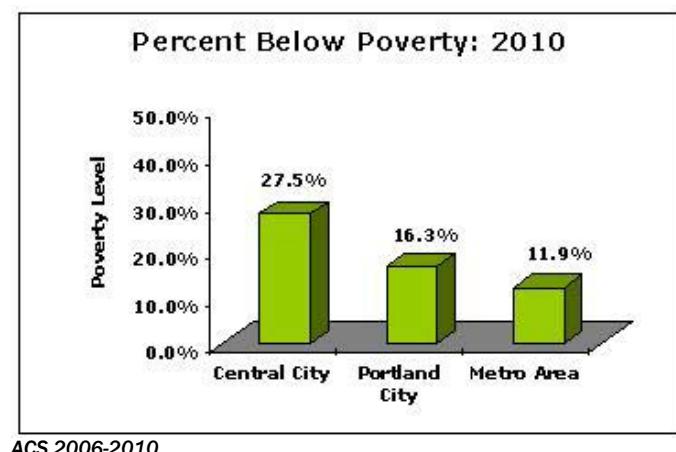
## Racial & Ethnic Distribution in Portland vs. Central City



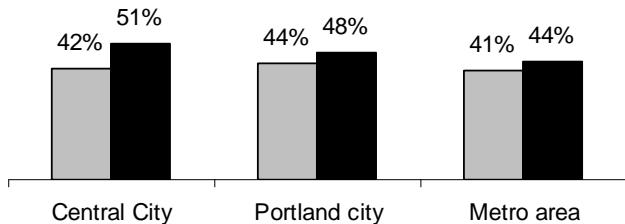
## Median Household Income



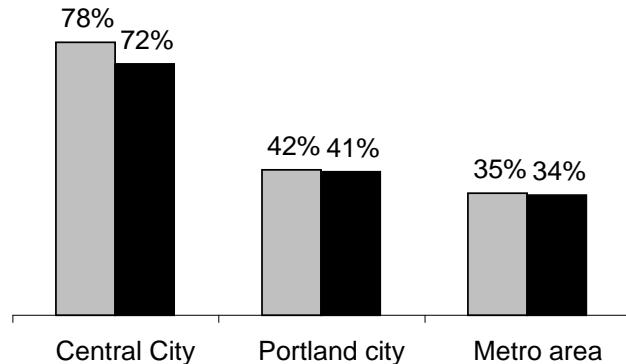
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Central City	Portland city	Metro area
2010	\$400,314	\$253,184	\$273,500
2000	\$250,566	\$154,721	\$168,347
% change	59.8%	63.6%	62.5%

# Central City Analysis Area

## Commercial Real Estate Indicators

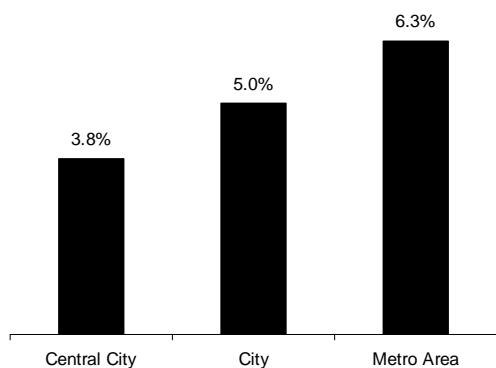
Retail and Commercial Real Estate data through 9-16-2010  
Source: COSTAR

### RETAIL

#### Square Feet

Central City	City	Metro Area
13,947,314	51,937,895	107,875,146

#### Retail Vacancy

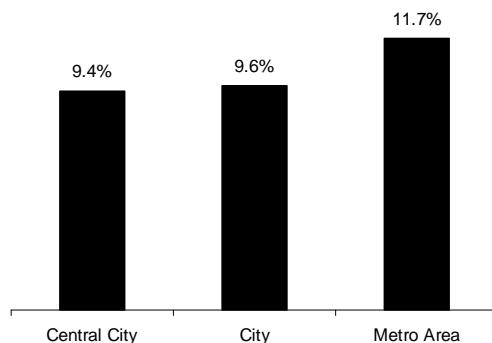


### OFFICE SPACE

#### Square Feet

Central City	City	Metro Area
31,960,133	54,348,765	92,465,455

#### Office Vacancy



#### Retail Rents



#### Office Rents



# Central City Analysis Area

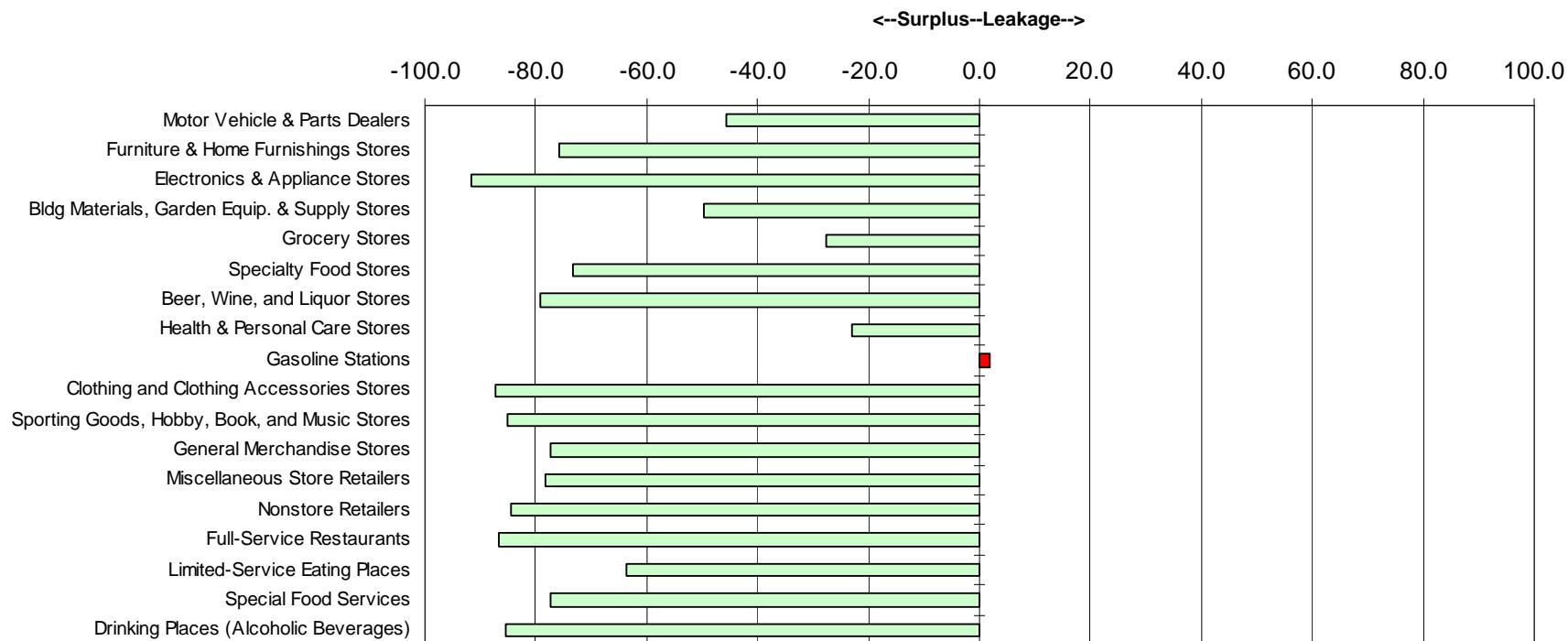
## Retail Market Profile

**Retail Gap = \$1.4 billion (surplus)**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$311,444,659	\$1,752,714,621	-\$1,441,269,962	-69.8	1,703
Total Retail Trade (NAICS 44-45)	\$263,690,952	\$1,333,685,102	-\$1,069,994,150	-67.0	1,103
Total Food & Drink (NAICS 722)	\$47,753,707	\$419,029,519	-\$371,275,812	-79.5	600

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Central City Analysis Area

## Employment

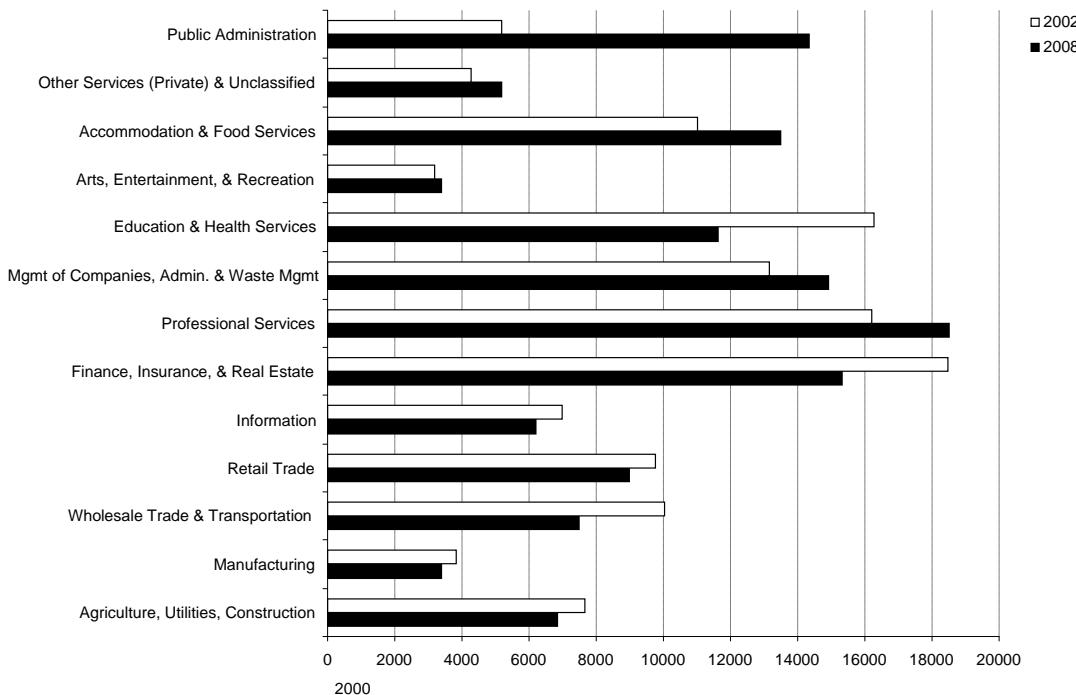
Quarterly Census of Employment and Wages data for 2002 & 2008  
 Source: Oregon Employment Department (OED)

This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.

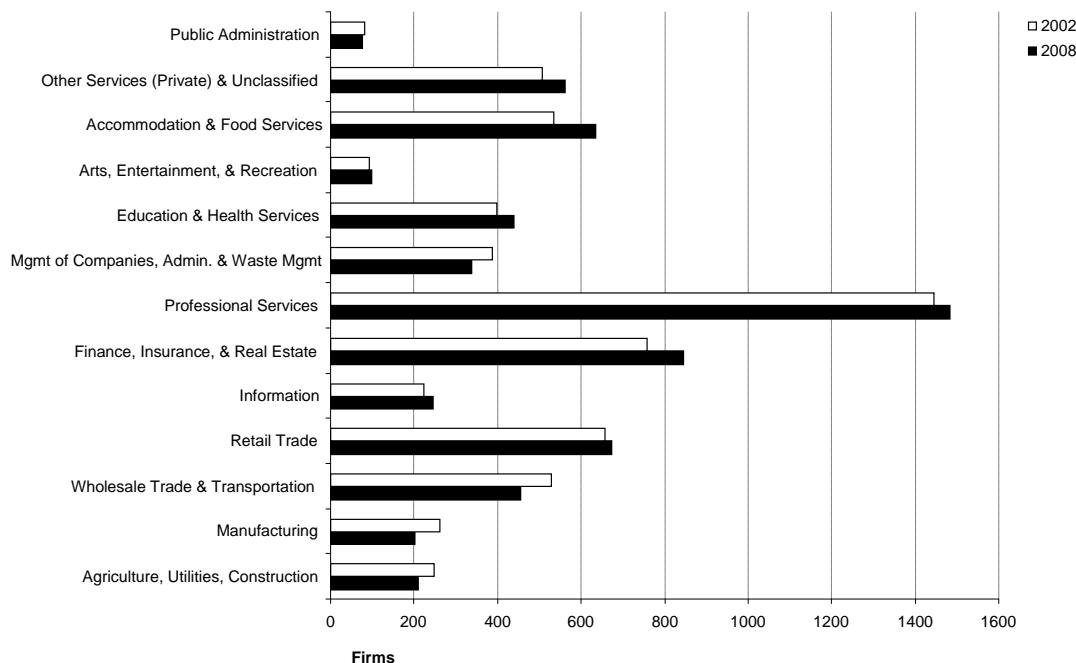
Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.

	2002	2008	change
Total Jobs	126,040	129,670	+3,360
Total Firms	6,122	6,260	+138
Average Annual Wages	\$46,002	\$55,941	+\$9,939

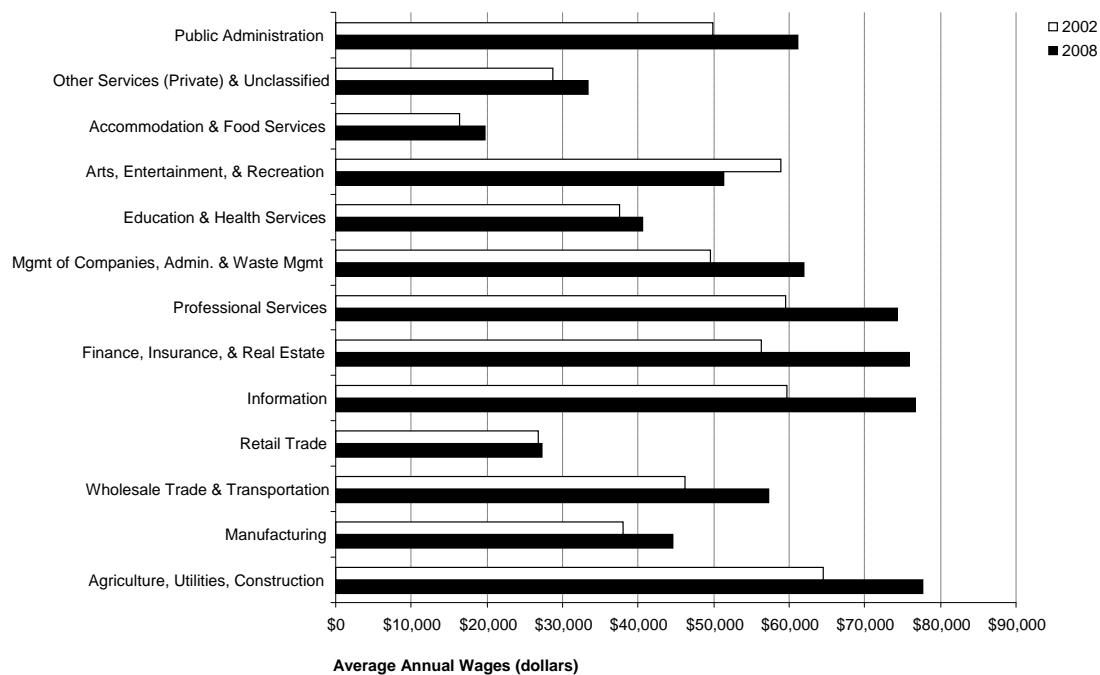
### Total Jobs



## Total Firms



## Average Annual Wages

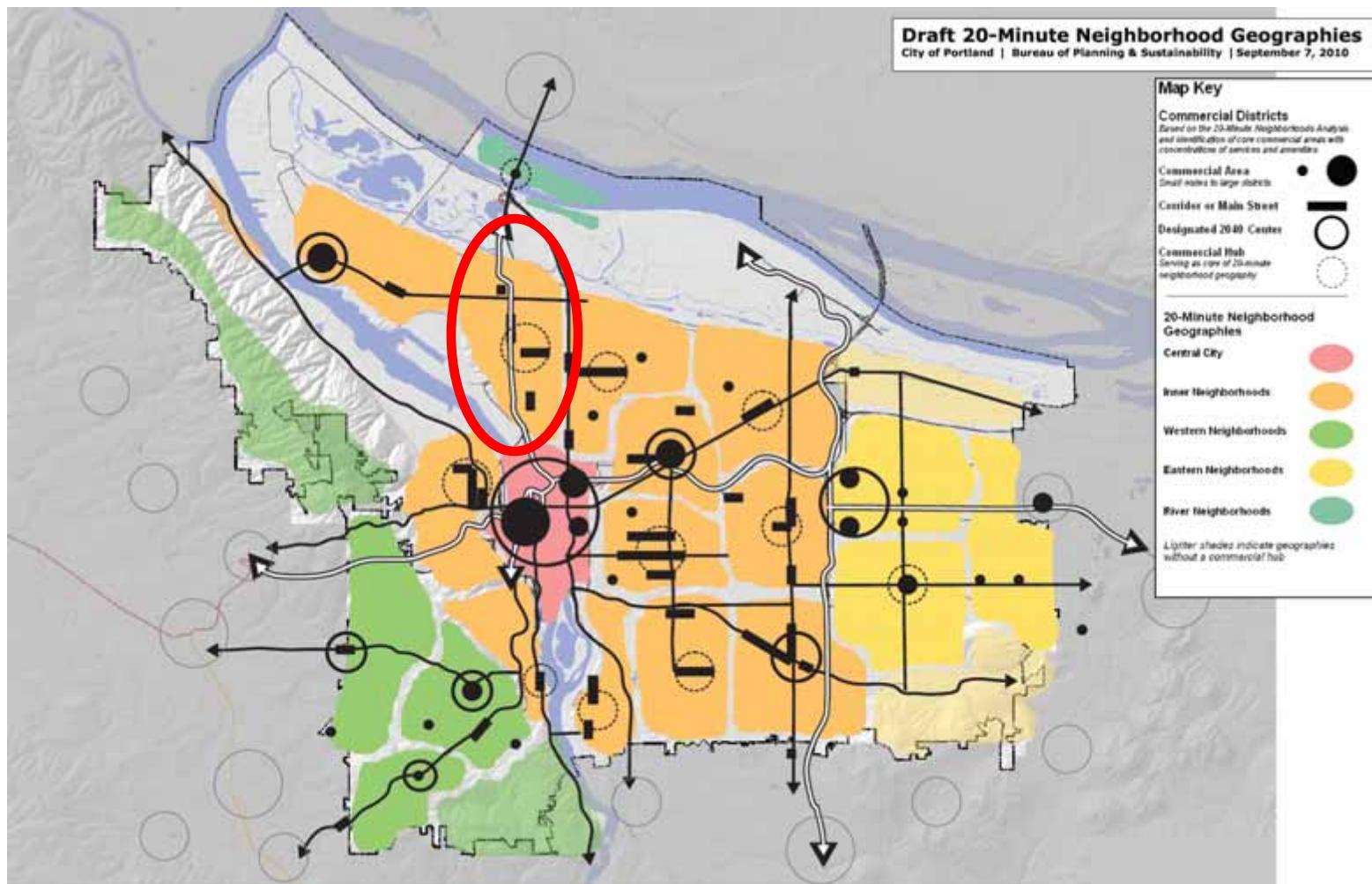




## Interstate Corridor Analysis Area

Including the Arbor Lodge, Boise, Humboldt, Kenton, Overlook, Piedmont neighborhoods, and part of the Eliot neighborhood

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Interstate Corridor Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 33,600 people (14,300 households)  
Land Area: 4.7 square miles (7,100 people per sq. mile)*

The area has a number of distinct commercial districts of varying sizes, mostly in the form of commercial main streets or corridors. Concentrations of commercial services are located along Lombard west of the I-5 freeway, along Killingsworth clustered near Portland Community College's Cascade campus, and in the historic Kenton and Mississippi Avenue main street districts. There are also smaller clusterings of commercial services along Interstate Avenue (which has the area's two full-service grocery stores and is served by light rail transit) and along the Vancouver-Williams corridor.

**Grocery stores:** 2 (1 store per 7,150 households)

**Retail gap:** \$37 million gap (*amount of estimated yearly retail spending by the analysis area population that is that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	97%
Within 1/2 mile of a public elementary school:	58%
Within 3 miles of a full-service community center*:	100%
Within 1/2 mile of a full-service grocery store:	16%
Within 1/4 mile of a frequent service transit stop:	74%

\*Parks Bureau service standard

**Community Centers:** 2 (Matt Dishman [full service] and Peninsula Park community centers)

**Libraries:** 2 (North Portland and Kenton libraries)

**Parks and Open Spaces:** 90 acres - including Peninsula, Farragut, Kenton, Arbor Lodge, Madrona, Overlook, Unthank, Dawson, and Lillis-Albina parks

**Tree Canopy Coverage:** 23%

**Public Schools:** 1 high school (Jefferson)

6 K-8 schools (Chief Joseph Elementary, and the Beach, Boise-Eliot, Humboldt, Ockley Green Arts, and Peninsula K-8 schools) and the Tubman Leadership Academy for Young Women (6-12)

**Colleges (campus):** 1 (Portland Community College Cascade Campus)

**Hospitals:** 2 (Kaiser Interstate, Legacy Emanuel)

**Farmers Markets:** 3 (Interstate and Kenton farmers markets, Market Q)

**Transit Centers/Stations:** 6 (North Lombard Transit Center and Interstate light rail stations at Denver, Rosa Parks, Killingsworth, Going and Overlook/Fremont)

**Walkable Access Score:** 63 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Arbor Lodge, Boise, Eliot, Humboldt, Kenton, Overlook, and Piedmont

**Business Associations:** Interstate Corridor, Kenton, North-Northeast, and North Portland business associations, and the Historic Mississippi District Association

## Urban Form Characteristics

Much of this area is composed of a grid of residential blocks, originally developed during the Streetcar Era with a continuous system of sidewalks. Interstate Avenue is the area's most significant street corridor, served by light rail transit and including a mix of auto-oriented and more recent transit-oriented development. The area also includes several main street business districts. The I-5 Freeway is located through the center of the area. Residential areas are separated by a bluff from industrial areas located along the Willamette riverfront.

**Access issues.** Good street and sidewalk connectivity, but the I-5 Freeway acts as a barrier. Good access to transit and relatively good access to commercial and community services.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	2.9 miles (Lombard, Killingsworth, Denver)
Station Communities:	6

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,058	54%	73
Multi-Family Residential:	508	26%	228
Commercial/Mixed-Use:	201	10%	99
Employment:	14	1%	7
Industrial:	66	3%	5
Open Space:	104	5%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

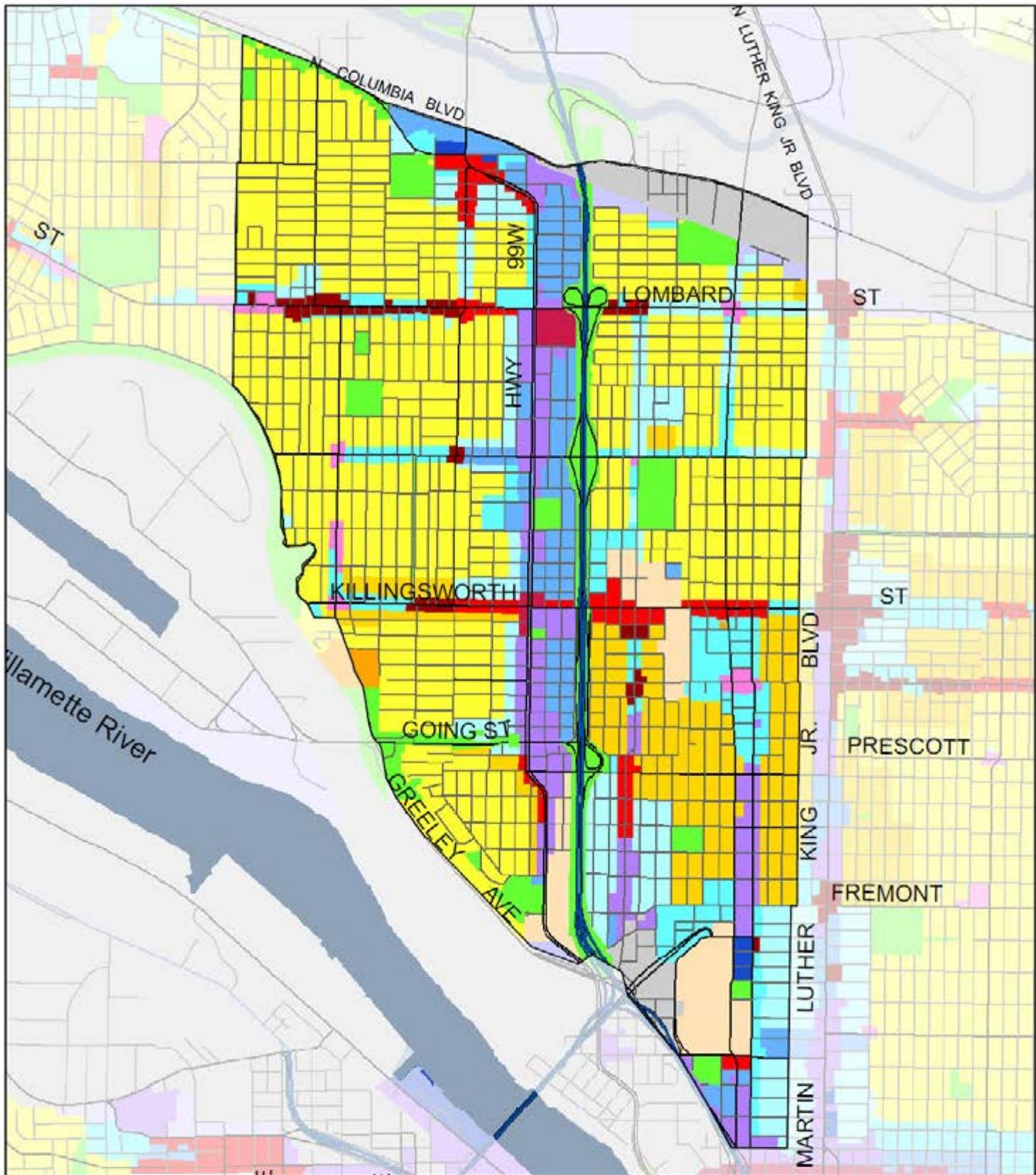
2010 Housing Units (Census):	15,128
2035 Housing Units:	26,700

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Interstate Corridor Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet

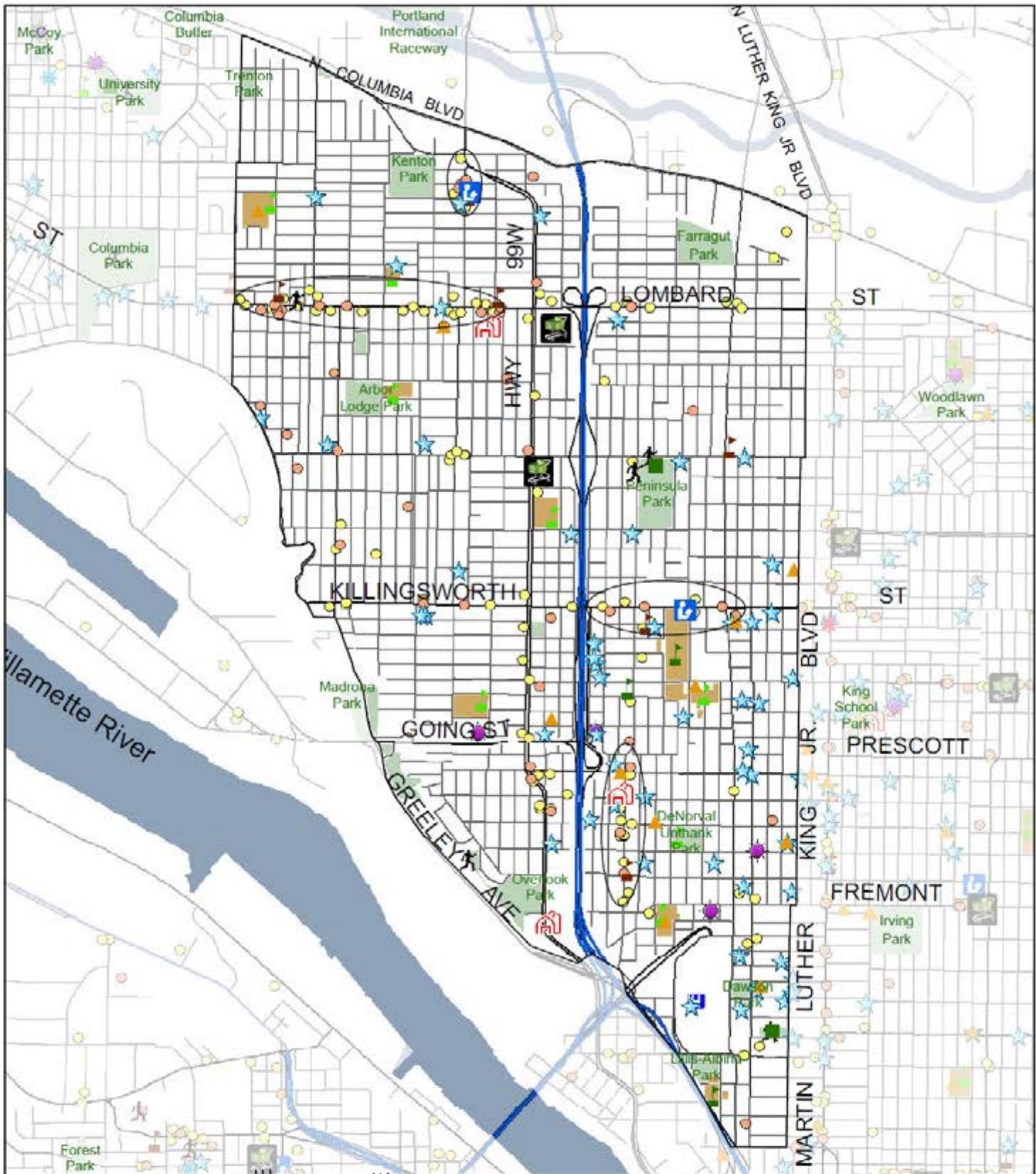


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# Interstate Corridor Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- ▼ Preschools
- ▲ Daycare Centers
- Farmers Markets
- Community Gardens
- Public HS
- Public K-8
- Private Schools
- County Health Clinic
- County Aging Services



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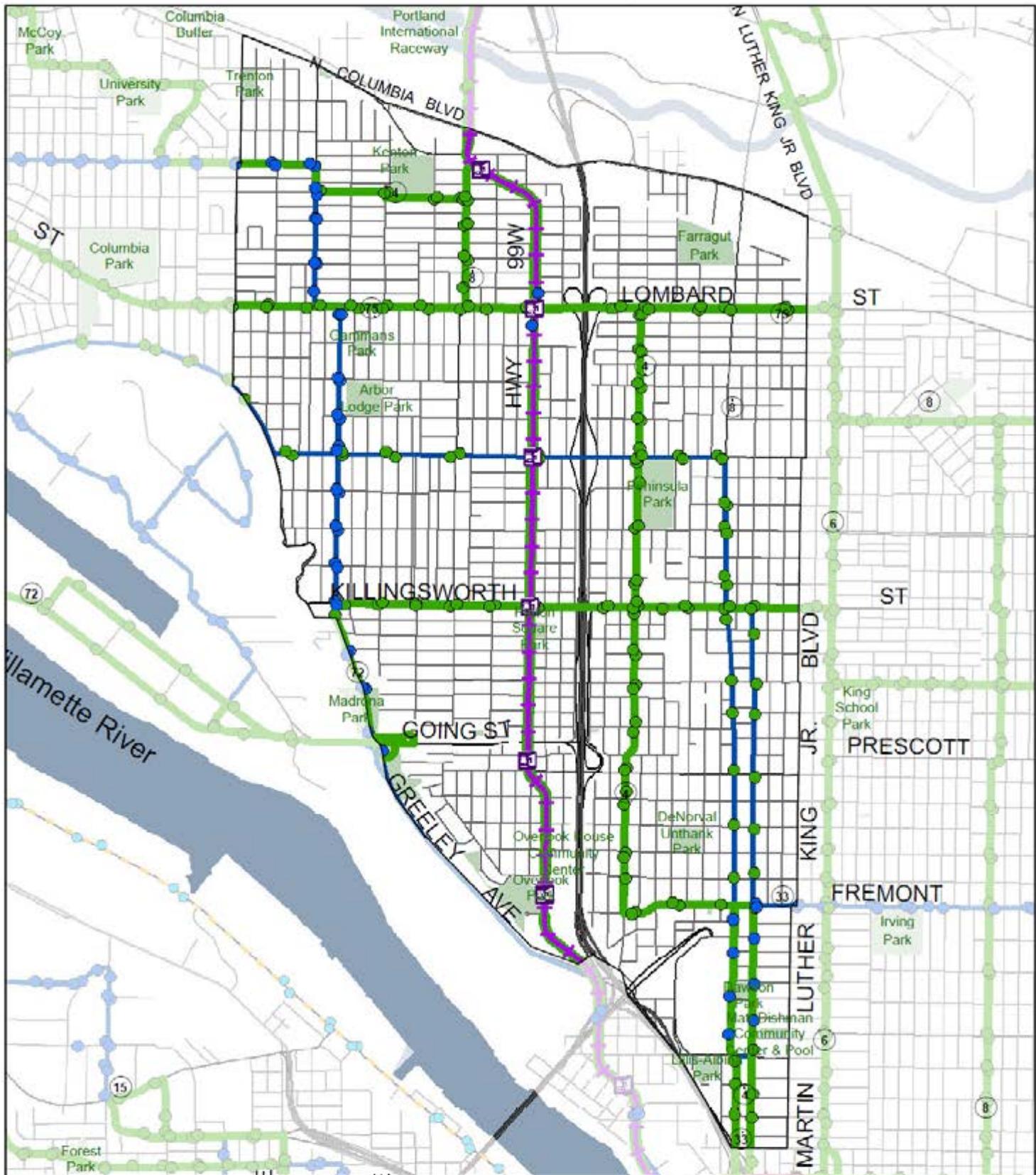


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Jon Adams Mayor • Sam Adams Director

# Interstate Corridor Analysis Area



## Transit Infrastructure

February 1, 2012

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- |                         |                  |
|-------------------------|------------------|
| <b>Light Rail Stops</b> | <b>Bus Stops</b> |
| MAX                     | Frequent Stops   |
| Street Car              | Standard Stops   |
| MAX                     | Rush Hour Stops  |
| Streetcar               |                  |
- 
- |            |                         |
|------------|-------------------------|
| <b>MAX</b> | <b>Frequent Service</b> |
| Street Car | Standard Service        |
| MAX        | Rush-Hour Only Service  |
| Streetcar  |                         |
- City Boundary



0 1,000 2,000 3,000 Feet

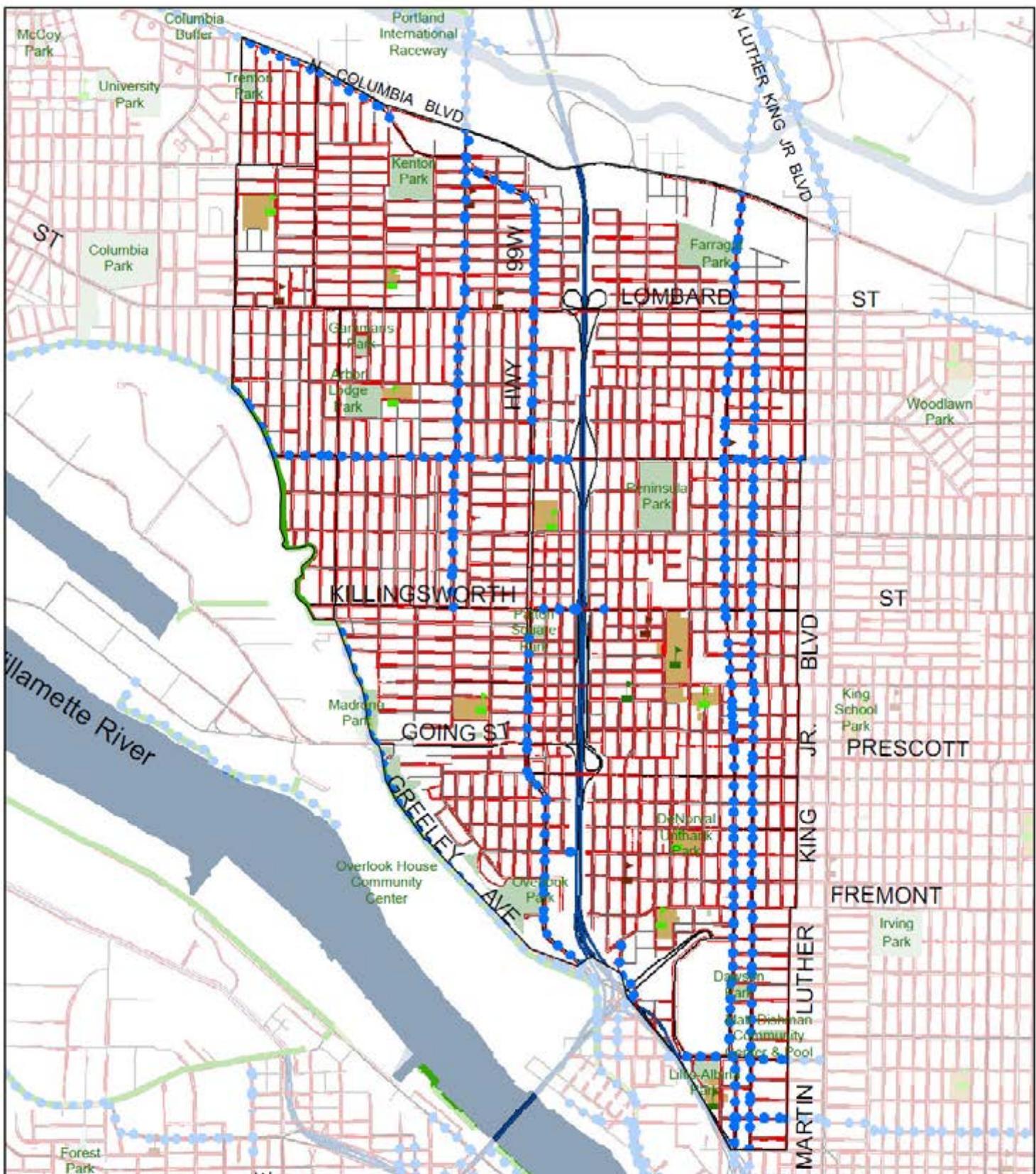


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# Interstate Corridor Analysis Area



## Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet



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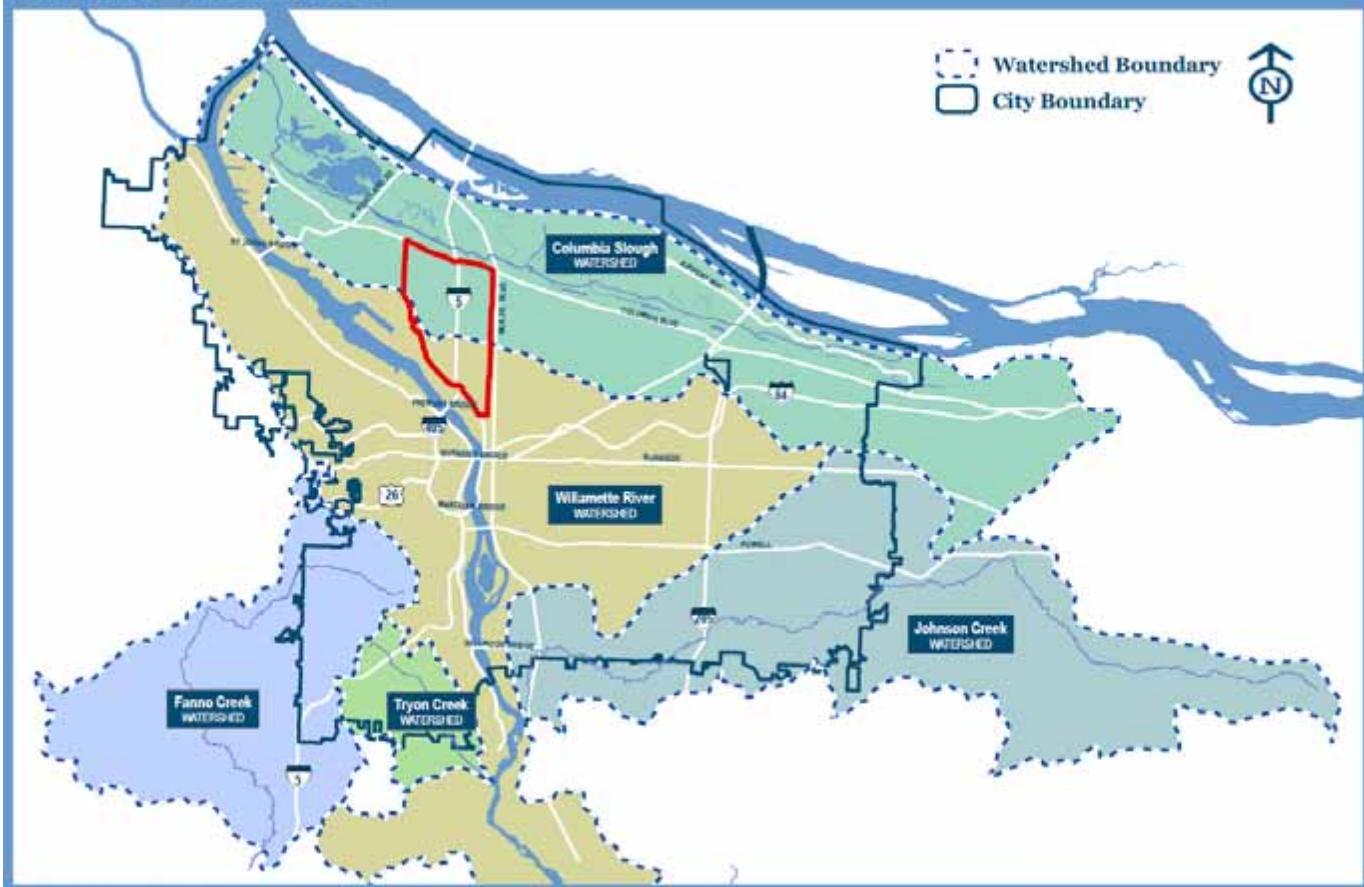


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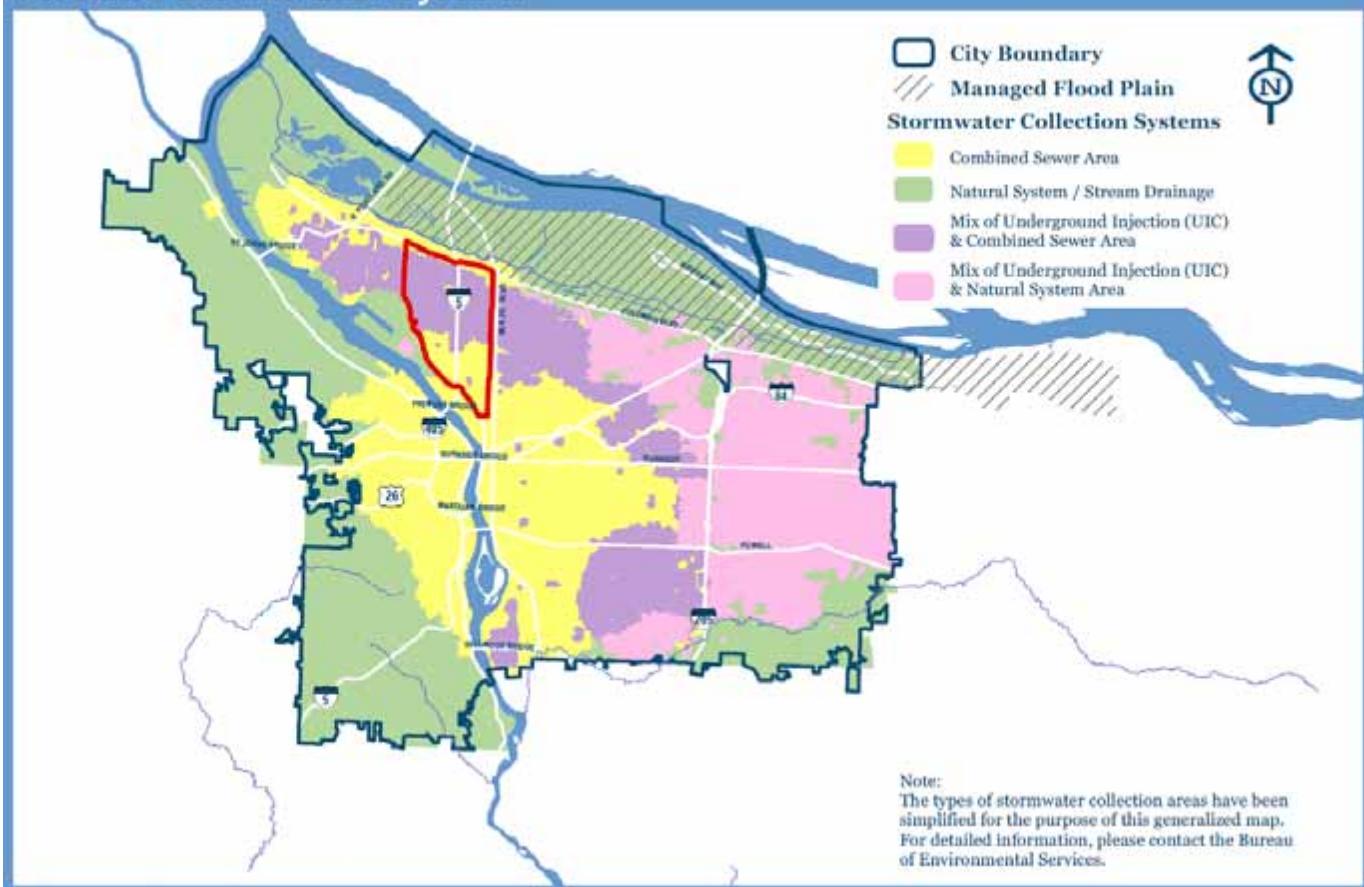
February 1, 2012

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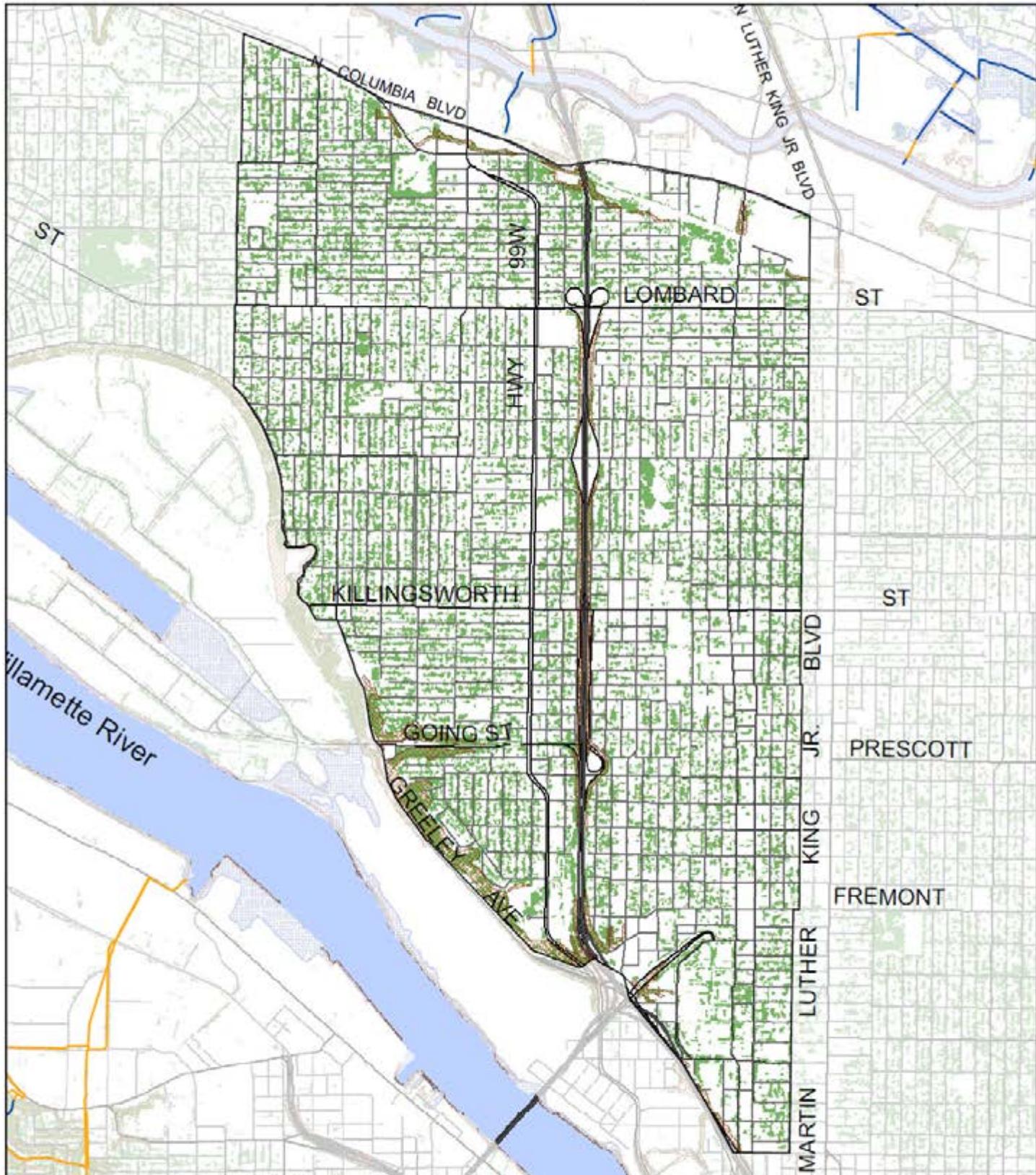
## Portland Watersheds



## Portland Stormwater System



# Interstate Corridor Analysis Area



## Watersheds and Natural Features

February 1, 2012

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000  
Feet



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# Interstate Corridor Analysis Area Demographics (2000 – 2010)

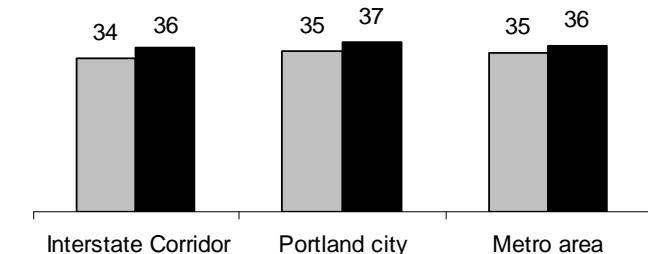
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

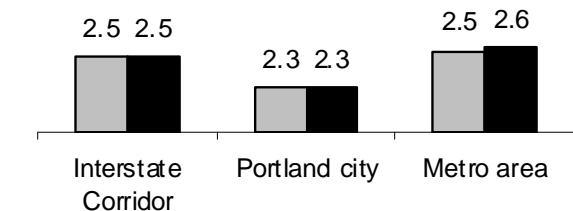
	Interstate Corridor	Portland city	Metro area
2010	33,636	583,776	2,226,009
2000	32,695	529,121	1,927,881
% change	3%	10%	15%

■ 2000 ■ 2010

## Median Age

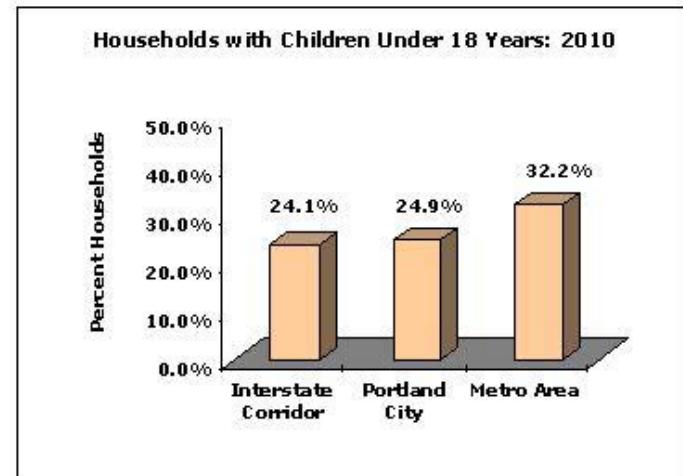
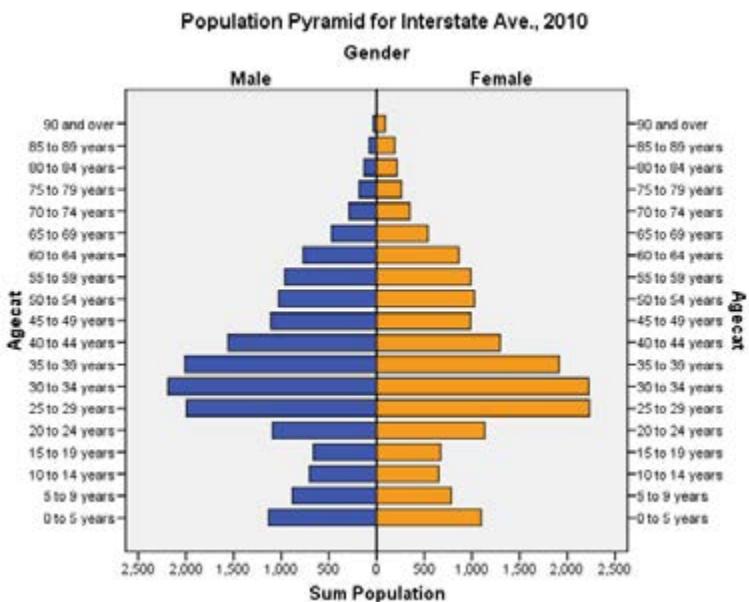
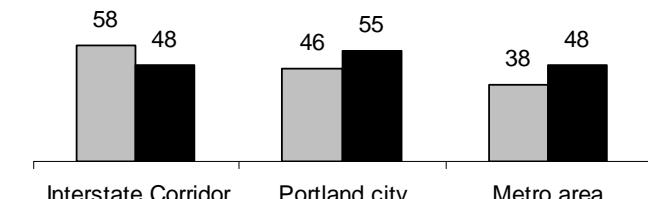


## Average Household Size

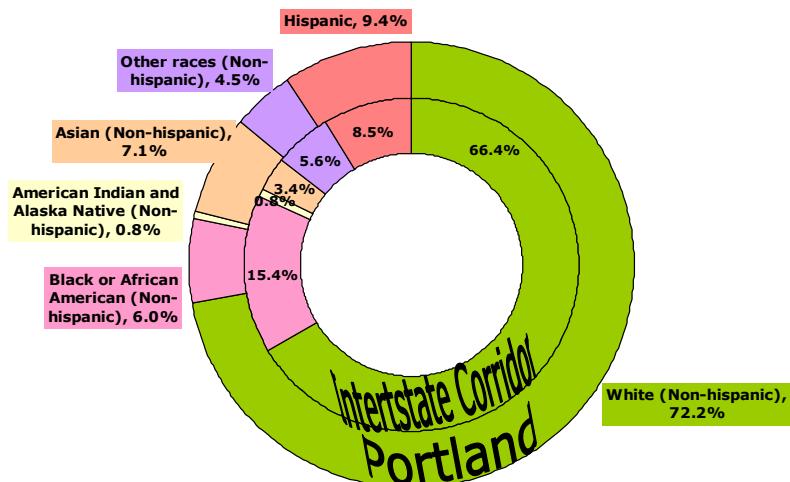


## Diversity Index

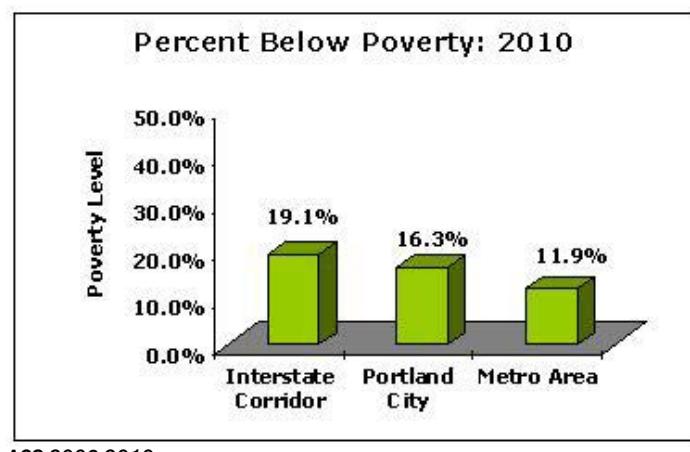
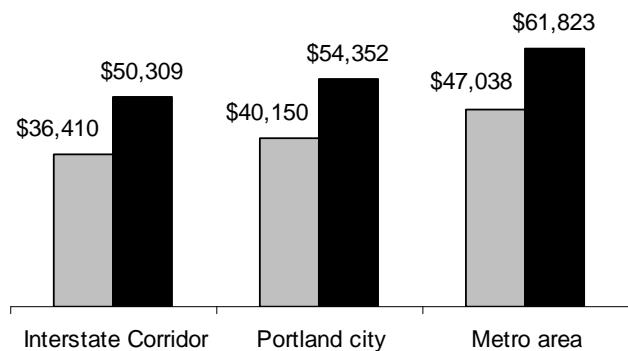
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



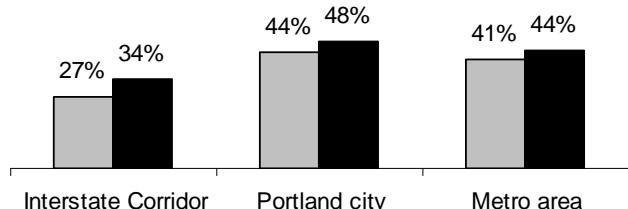
## Racial and Ethnic Distribution in Portland vs. Interstate Corridor



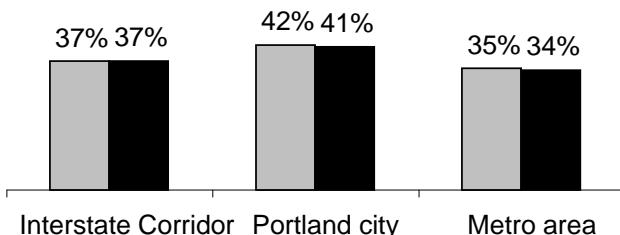
## Median Household Income



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Interstate Corridor	Portland city	Metro area
2010	\$197,371	\$253,184	\$273,500
2000	\$127,233	\$154,721	\$168,347
% change	55.1%	63.6%	62.5%

# Interstate Corridor Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

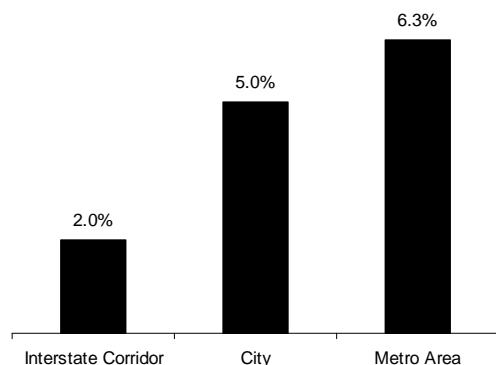
Insterstate	City	Metro Area
1,661,047	51,937,895	107,875,146

### OFFICE SPACE

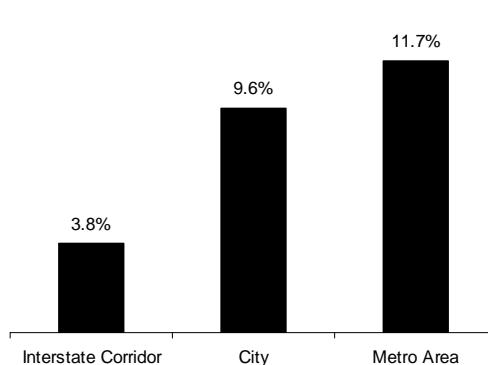
#### Square Feet

Insterstate	City	Metro Area
846,502	54,348,765	92,465,455

#### Retail Vacancy



#### Office Vacancy



#### Retail Rents



#### Office Rents



# Interstate Corridor Analysis Area

## Retail Market Profile

**Retail Gap = \$37 million**

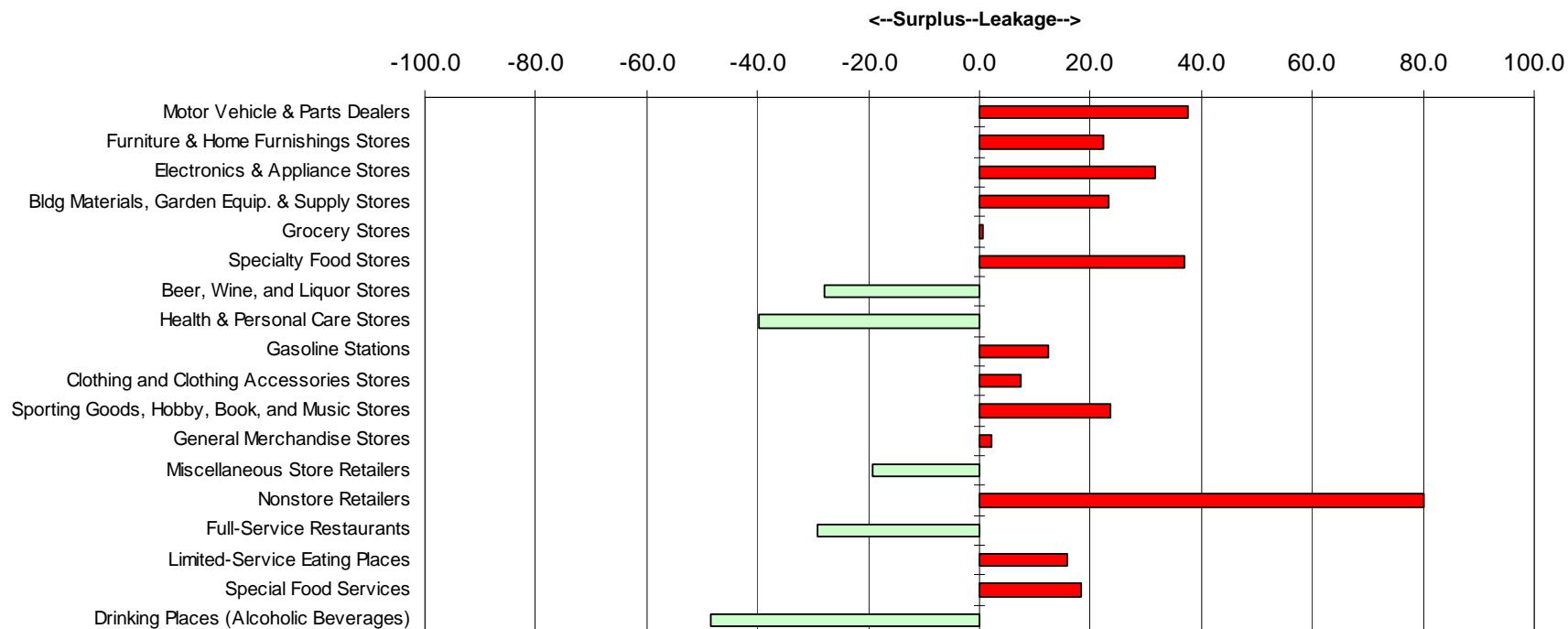
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
<b>Total Retail Trade and Food &amp; Drink (NAICS 44-45, 722)</b>	\$286,154,032	\$249,087,847	<b>\$37,066,185</b>	<b>6.9</b>	290
Total Retail Trade (NAICS 44-45)	\$243,944,250	\$194,664,430	<b>\$49,279,820</b>	<b>11.2</b>	182
Total Food & Drink (NAICS 722)	\$42,209,782	\$54,423,417	-\$12,213,635	-12.6	108

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Interstate Corridor Analysis Area

## Employment

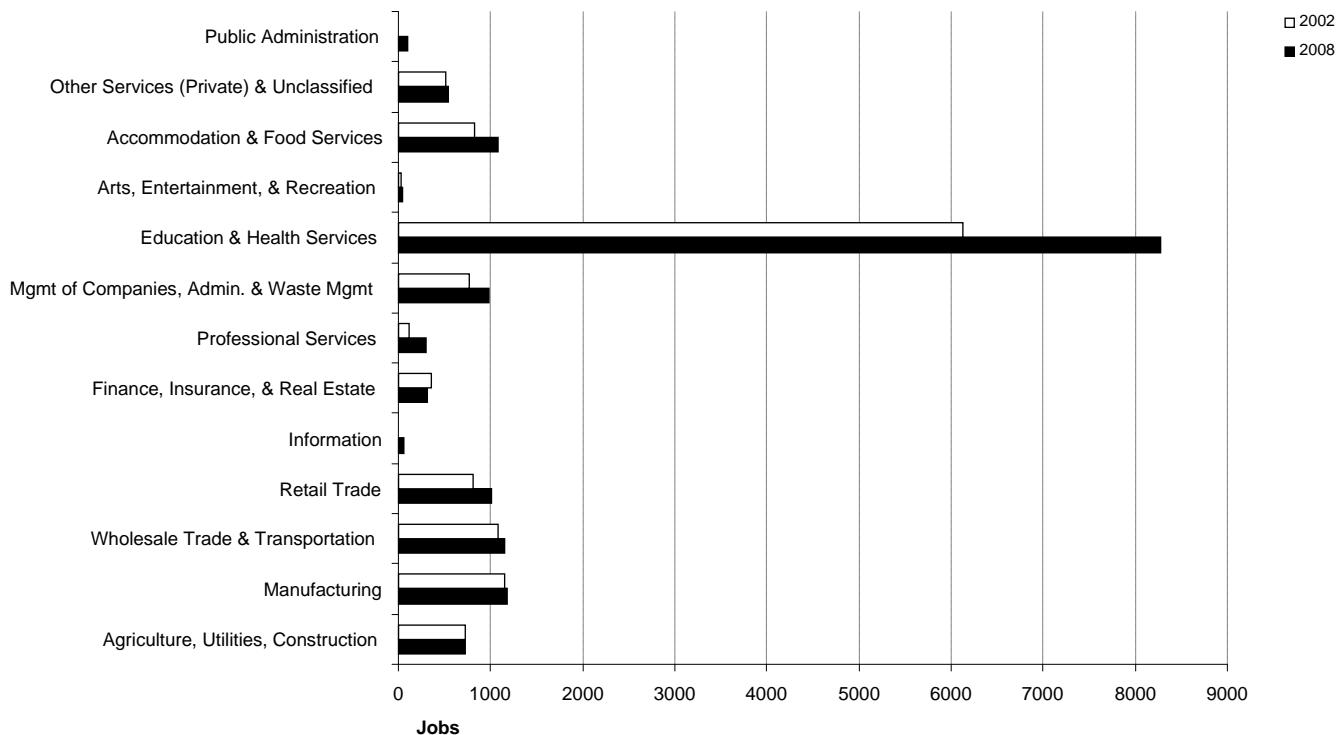
Quarterly Census of Employment and Wages data for 2002 & 2008  
 Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

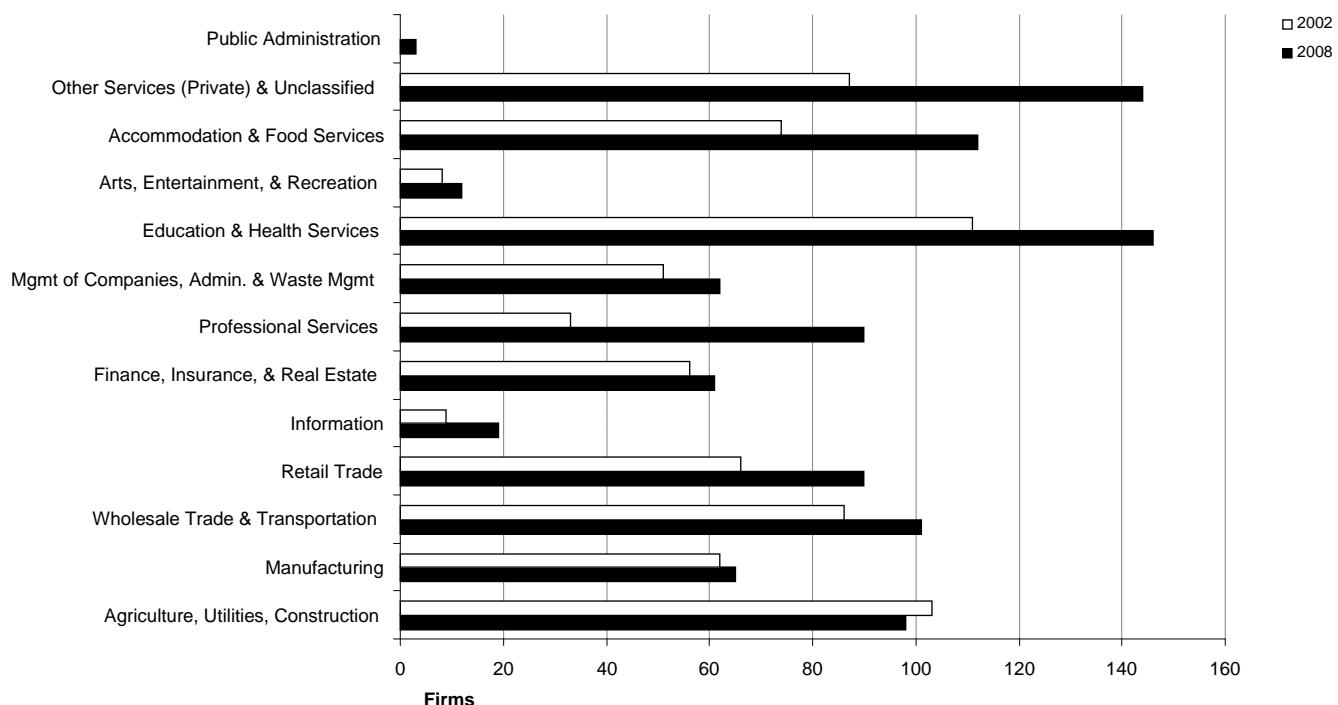
*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	12,518	15,652	+3,314
Total Firms	746	1,003	+257
Average Annual Wages	\$37,644	\$44,613	+\$6,969

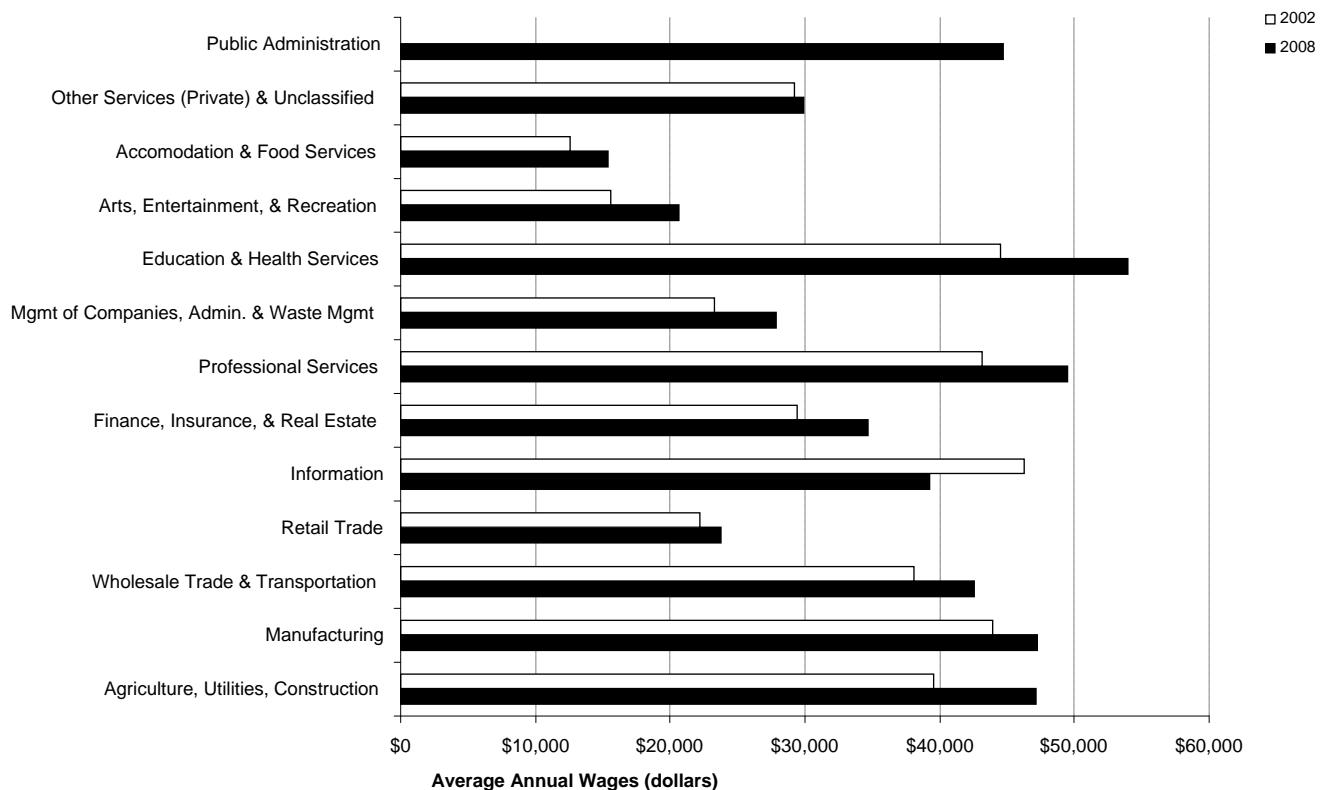
### Total Jobs



### Total Firms



### Average Annual Wages

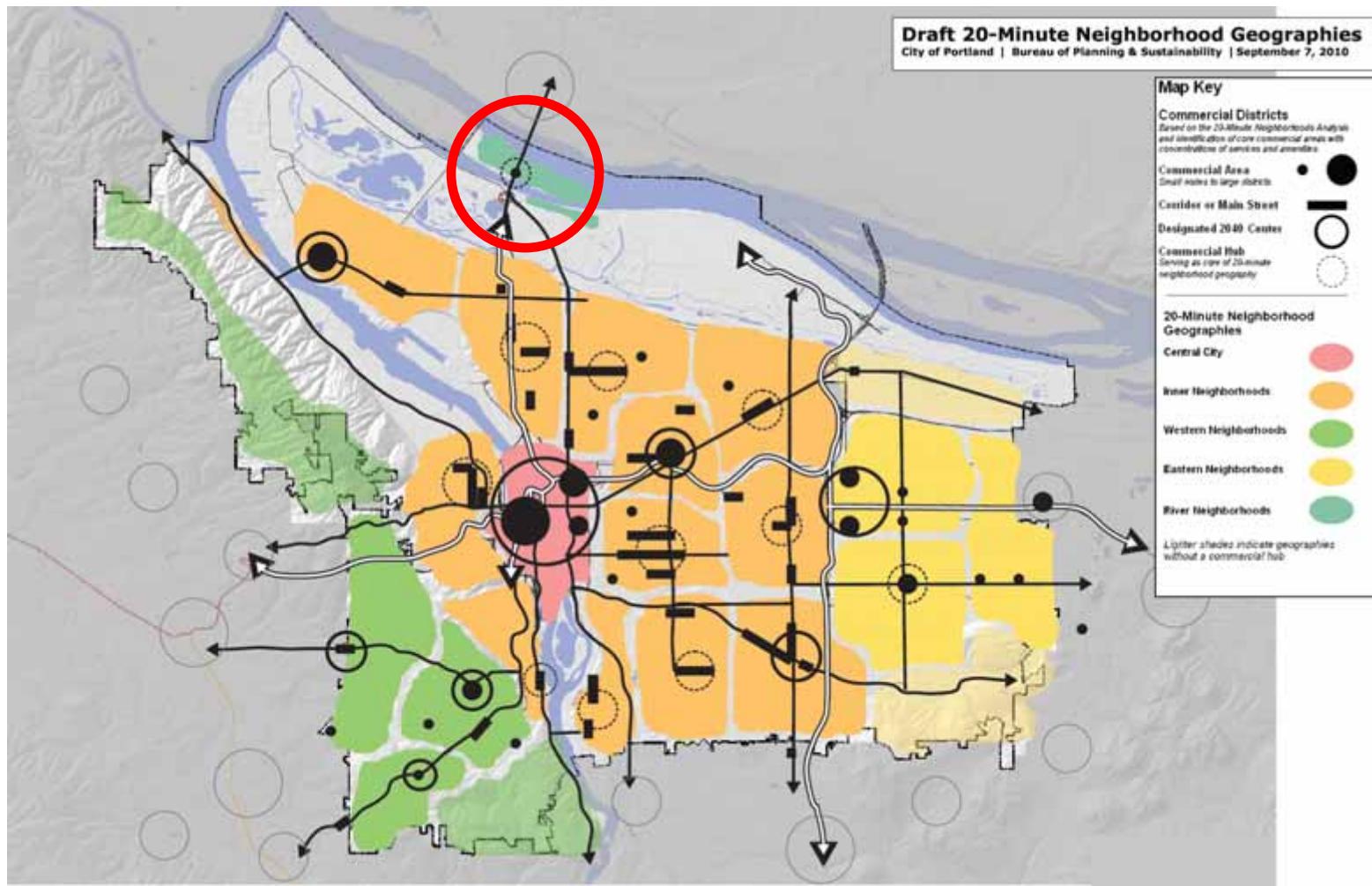




## Hayden Island-Bridgeton Analysis Area

Including the Hayden Island, Bridgeton, and East Columbia neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Hayden Island-Bridgeton Analysis Area

## Services and Amenities

*Population: 4,200 people (2,200 households)  
Land Area: 2.0 square miles (2,100 people per sq. mile)*

### Commercial Districts

The area's primary concentrations of commercial services are at the Jantzen Beach and Delta Park shopping centers (the latter located adjacent to the analysis area boundaries).

**Grocery stores:** 3 (1 store per 733 households)

**Retail gap:** \$139 million surplus (*amount of estimated yearly retail sales that is beyond what the analysis area population be expected to support, indicating the regional market of the area's retail*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	29%
Within 1/2 mile of a public elementary school:	0%
Within 3 miles of a full-service community center*:	34%
Within 1/2 mile of a full-service grocery store:	7%
Within 1/4 mile of a frequent service transit stop:	3%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** None

**Parks and Open Spaces:** 30 acres - including the Columbia Childrens Arboretum.  
Located nearby are East Delta Park, Heron Lakes Golf Course and Portland International Raceway.

**Tree Canopy Coverage:** 18%

**Public Schools:** None

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None (1 planned for Hayden Island, also 2 existing light rail stations located to the west of the analysis area [Expo Center, Delta Park/Vanport])

**Walkable Access Score:** 26 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Hayden Island, Bridgeton, and East Columbia

**Business Associations:** Columbia Corridor Association

## Urban Form Characteristics

The area is distinctive in its river setting. Residential areas include a mix of waterfront communities, including manufactured home complexes, clusters of waterfront apartment or condominium buildings, and house boat communities. The area includes the large auto-oriented Jantzen Beach shopping area. The I-5 Freeway goes through the center of the area and is the only vehicular, pedestrian or bicycle access to and from Hayden Island. The Bridgeton area includes high-density residential development and an urban block structure along the Columbia River, in distinction from the predominant employment and open space lands of the rest of the Columbia Slough.

**Access issues.** Much of the area lacks street and sidewalk connectivity. The area is rich in commercial services, but commercial areas are not integrated with residential areas, limiting walkable accessibility. Limited access to transit and community services, with no nearby schools.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	0
Station Communities:	1 planned (Hayden Island)

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	238	20%	91
Multi-Family Residential:	121	10%	14
Commercial/Mixed-Use:	325	29%	139
Employment:	3	.3%	0
Industrial:	296	25%	25
Open Space:	183	16%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

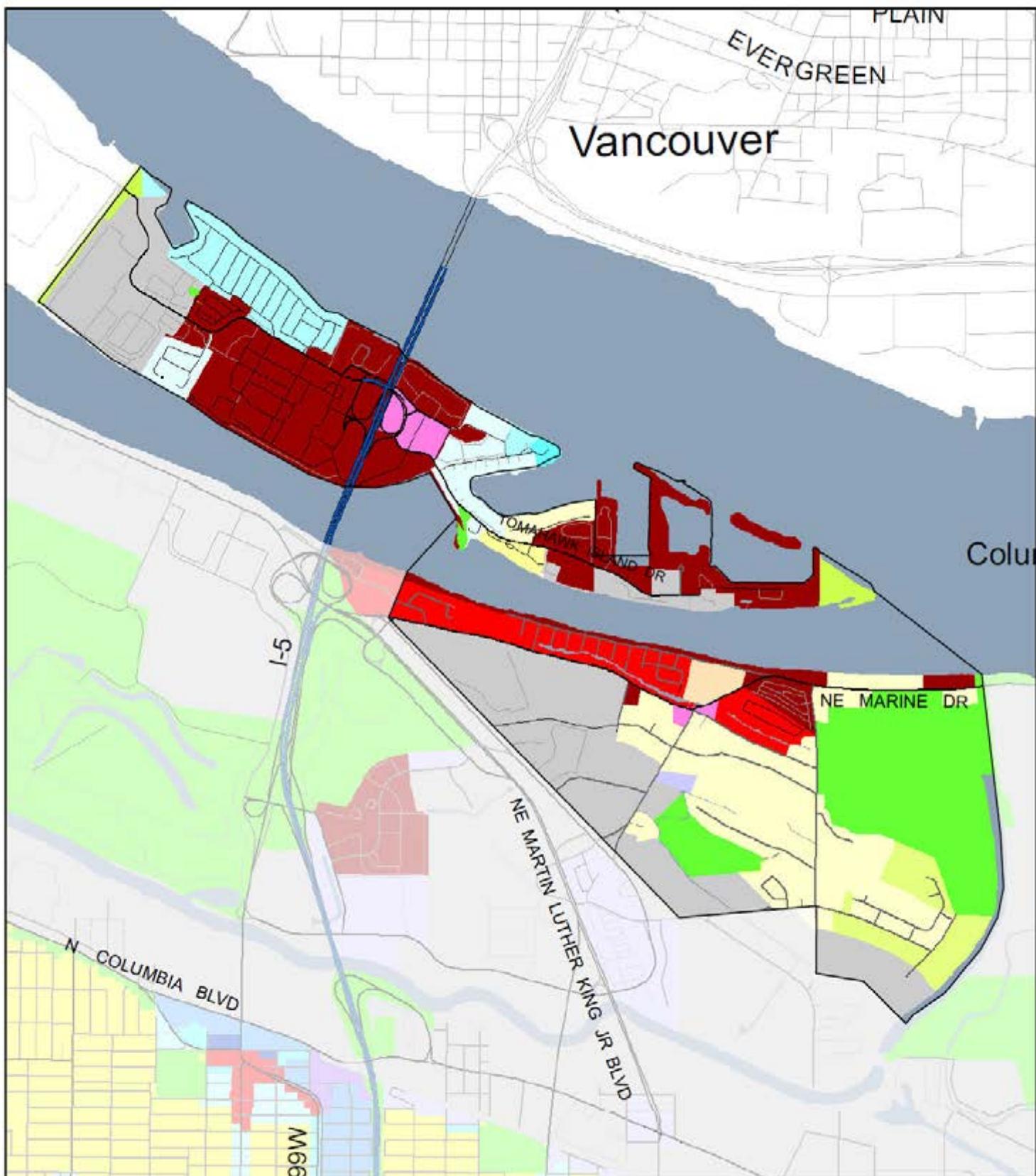
2010 Housing Units (Census):	2,501
2035 Housing Units:	4,900

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Hayden Island-Bridgeton Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000 Feet



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# Hayden Island-Bridgeton Analysis Area

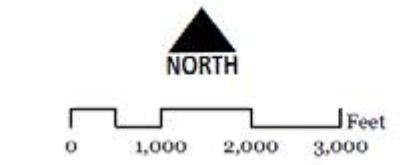


## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- ▼ Preschools
- ▲ Daycare Centers
- Farmer Markets
- Community Gardens
- Community Centers
- County Health Clinic
- County Aging Services
- Libraries
- Public HS
- Public K-8
- Private Schools

- Preschools
- ▲ Daycare Centers
- Farmer Markets
- Community Gardens
- Community Centers
- County Health Clinic
- County Aging Services



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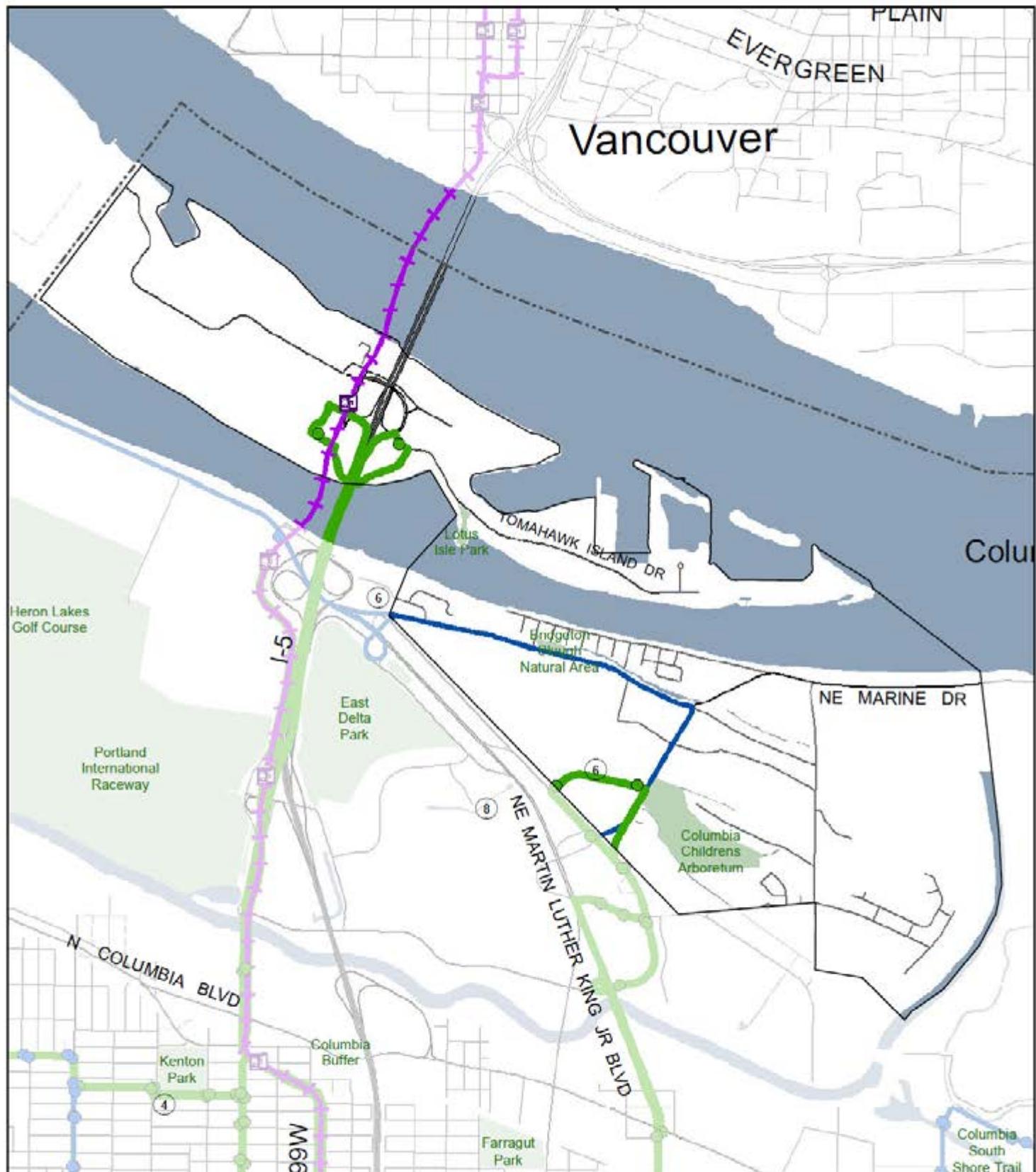


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# Hayden Island-Bridgeton Analysis Area



## Transit Infrastructure

February 1, 2012

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- | Light Rail Stops  | Bus Stops   |
|-------------------|---|
| MAX<br>Street Car | Frequent Stops<br>Standard Stops<br>Rush Hour Stops                                 |
| MAX<br>Streetcar  | <b>Frequent Service</b><br><b>Standard Service</b><br><b>Rush-Hour Only Service</b> |
|                   | <b>City Boundary</b>  |



0 1,000 2,000 3,000 Feet

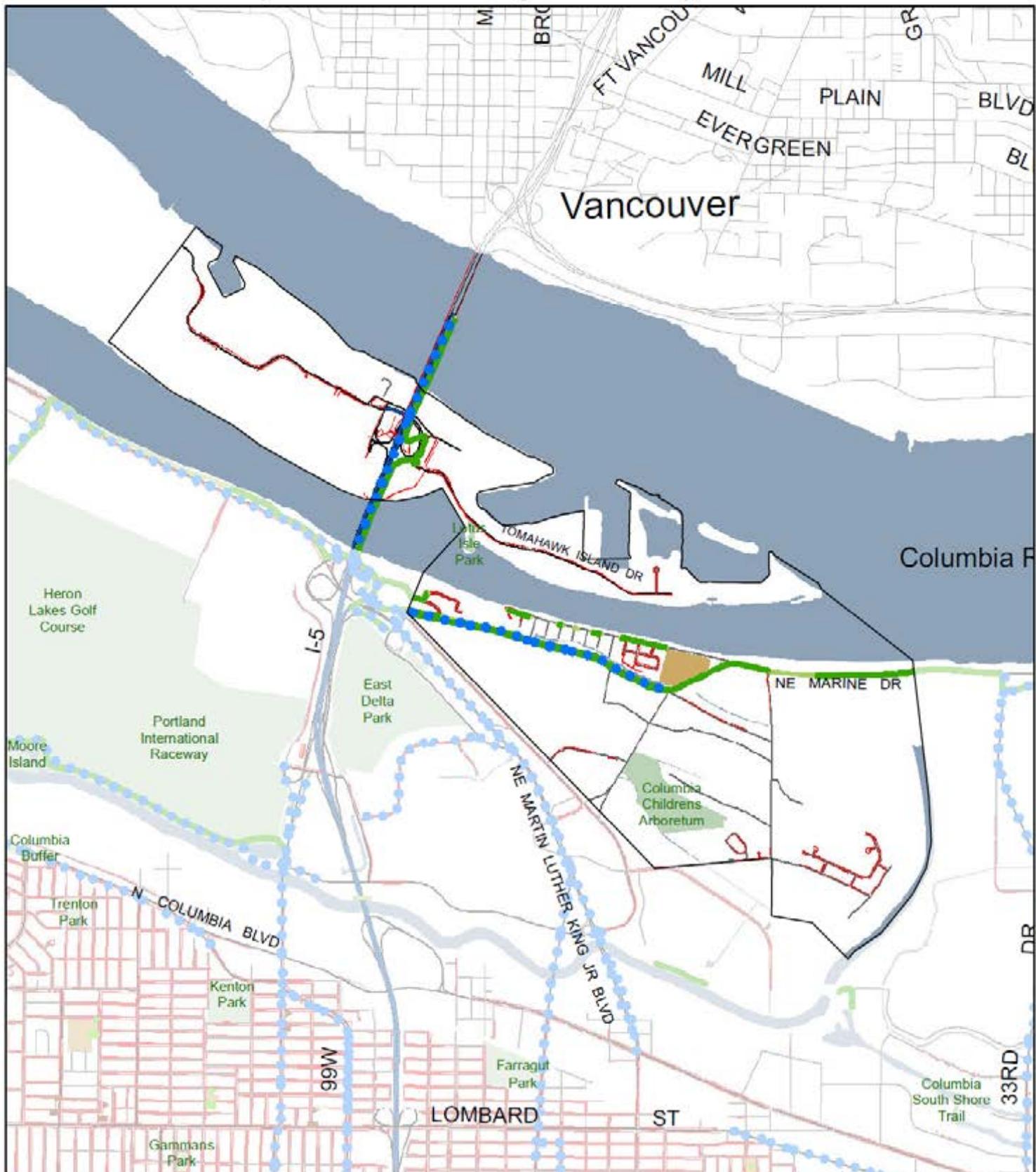


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# Hayden Island-Bridgeton Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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**CITY OF PORTLAND BUREAU OF PLANNING AND SUSTAINABILITY**

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet



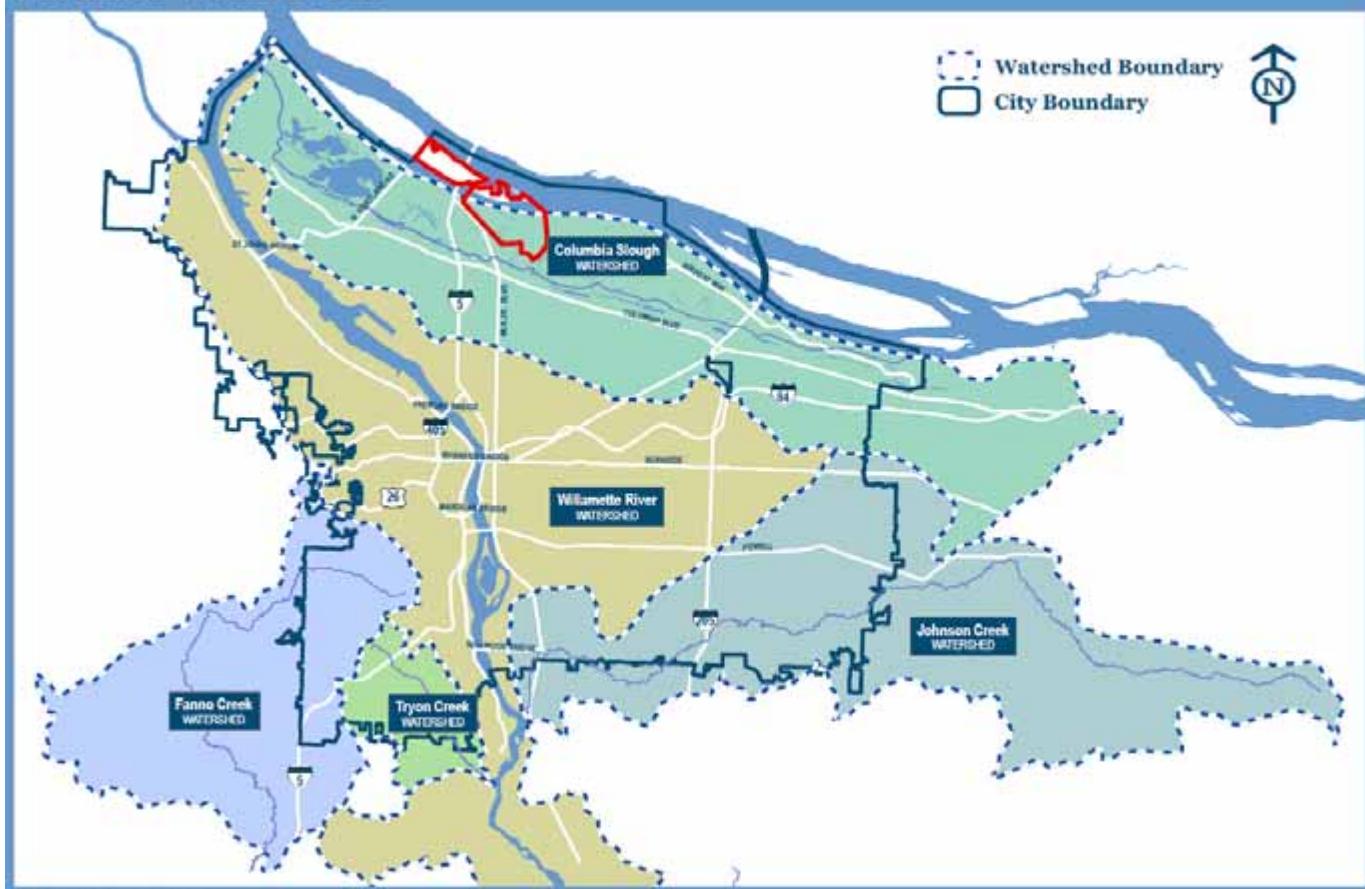
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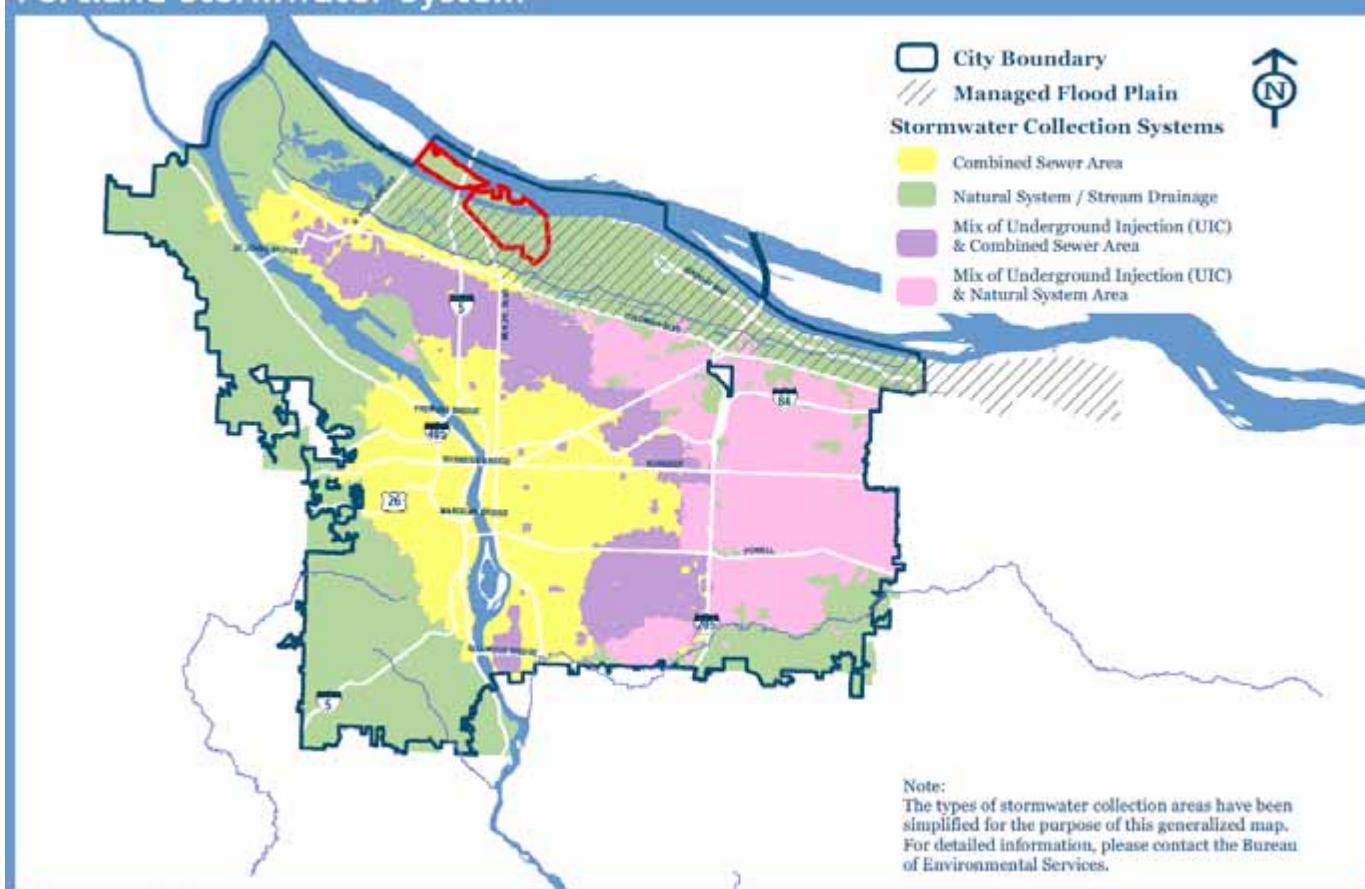
City of Portland, Oregon  
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5-1

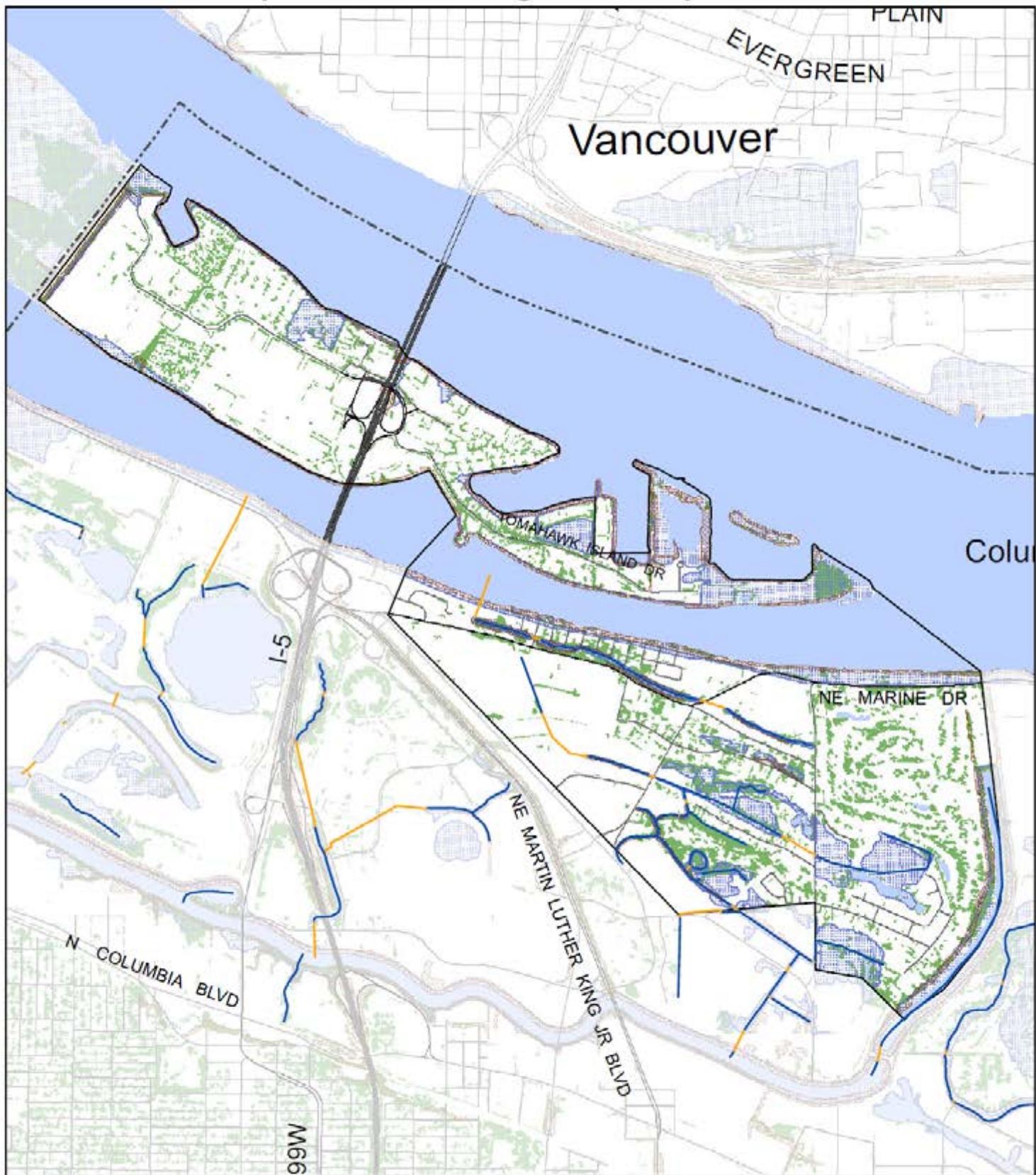
## Portland Watersheds



## Portland Stormwater System



# Hayden Island-Bridgeton Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



# Hayden Island-Bridgeton Analysis Area

## Demographics (2000 – 2010)

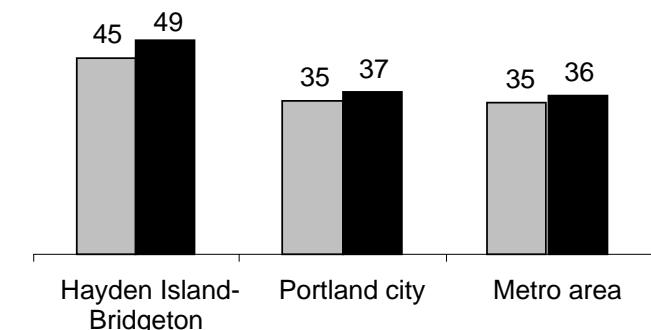
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

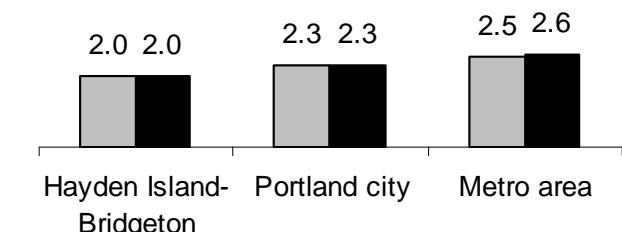
	Hayden Island- Bridgeton	Portland city	Metro area
2010	4,223	583,776	2,226,009
2000	2,912	529,121	1,927,881
% change	45%	10%	15%

■ 2000 ■ 2010

### Median Age

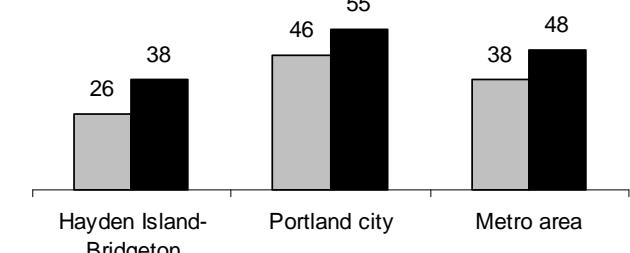


### Average Household Size

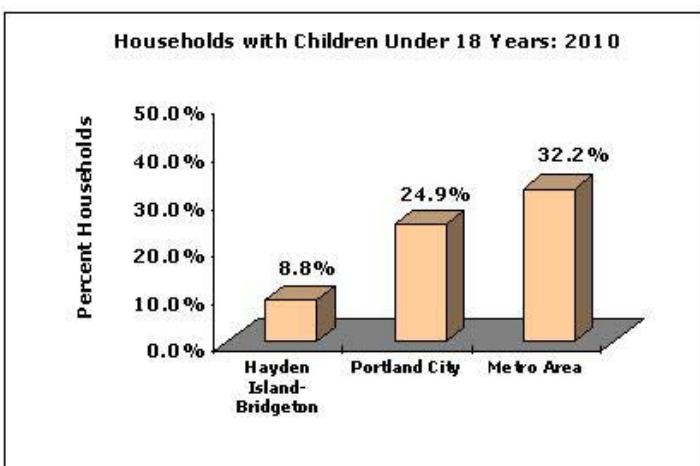
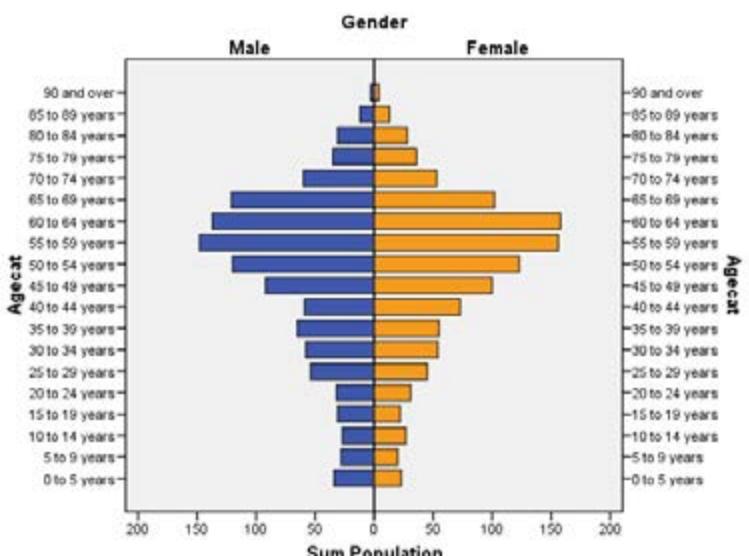


### Diversity Index

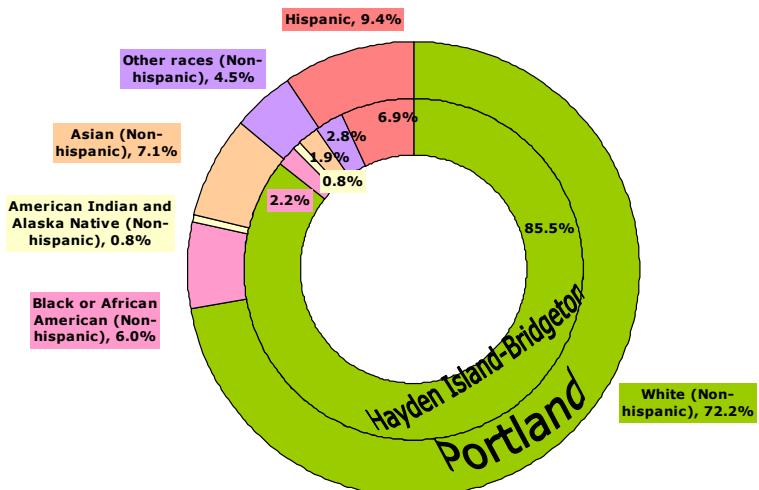
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



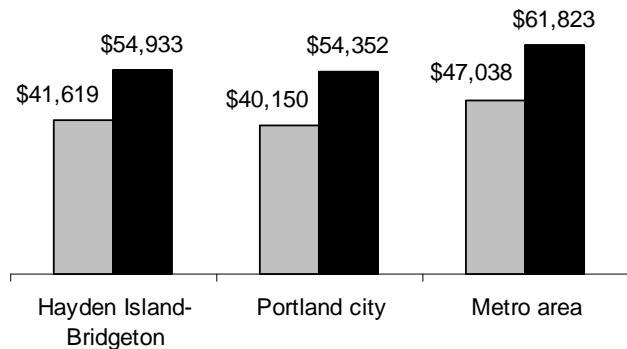
Population Pyramid for Hayden Island-Bridgeton, 2010



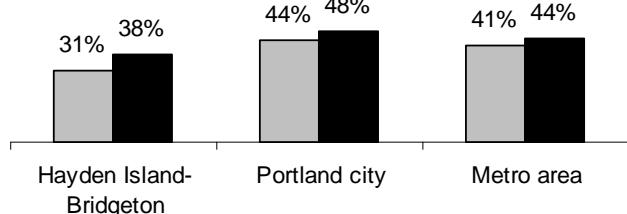
Racial and Ethnic Distribution in Portland vs. Hayden Island-Bridgeton



### Median Household Income



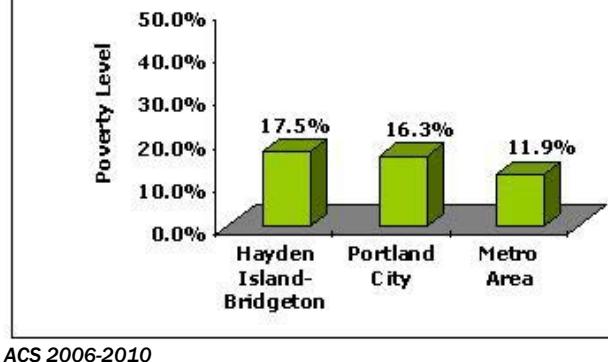
### Percent College Graduates



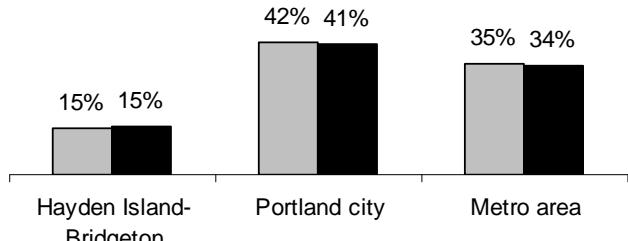
### Median Home Value

	Hayden Island-	Portland city	Metro area
2010	\$79,875	\$253,184	\$273,500
2000	\$61,081	\$154,721	\$168,347
% change	30.8%	63.6%	62.5%

### Percent Below Poverty: 2010



### Percent Renters of Occupied Housing Units



# Hayden Island-Bridgeton Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

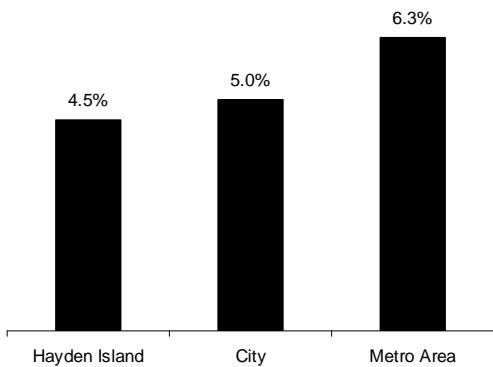
Hayden Island	City	Metro Area
1,124,437	51,937,895	107,875,146

### OFFICE SPACE

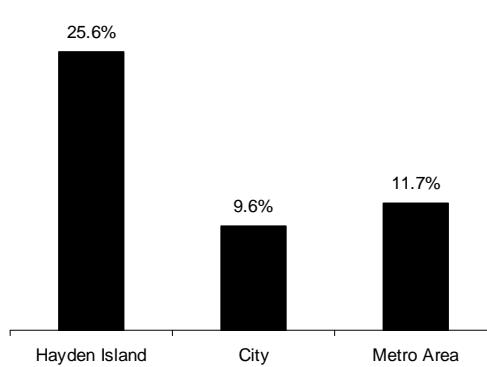
#### Square Feet

Hayden Island	City	Metro Area
79,556	54,348,765	92,465,455

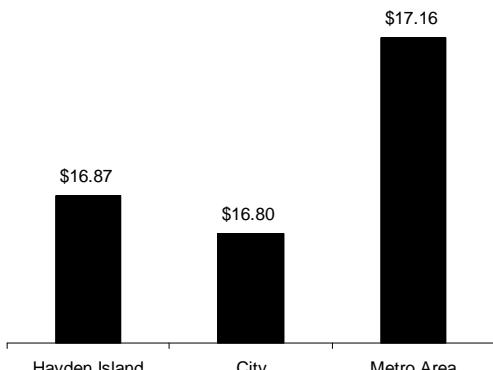
#### Retail Vacancy



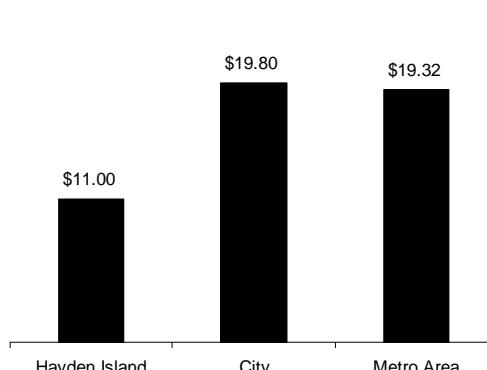
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Hayden Island-Bridgeton Analysis Area

## Retail Market Profile

**Retail Gap = \$139 million (surplus)**

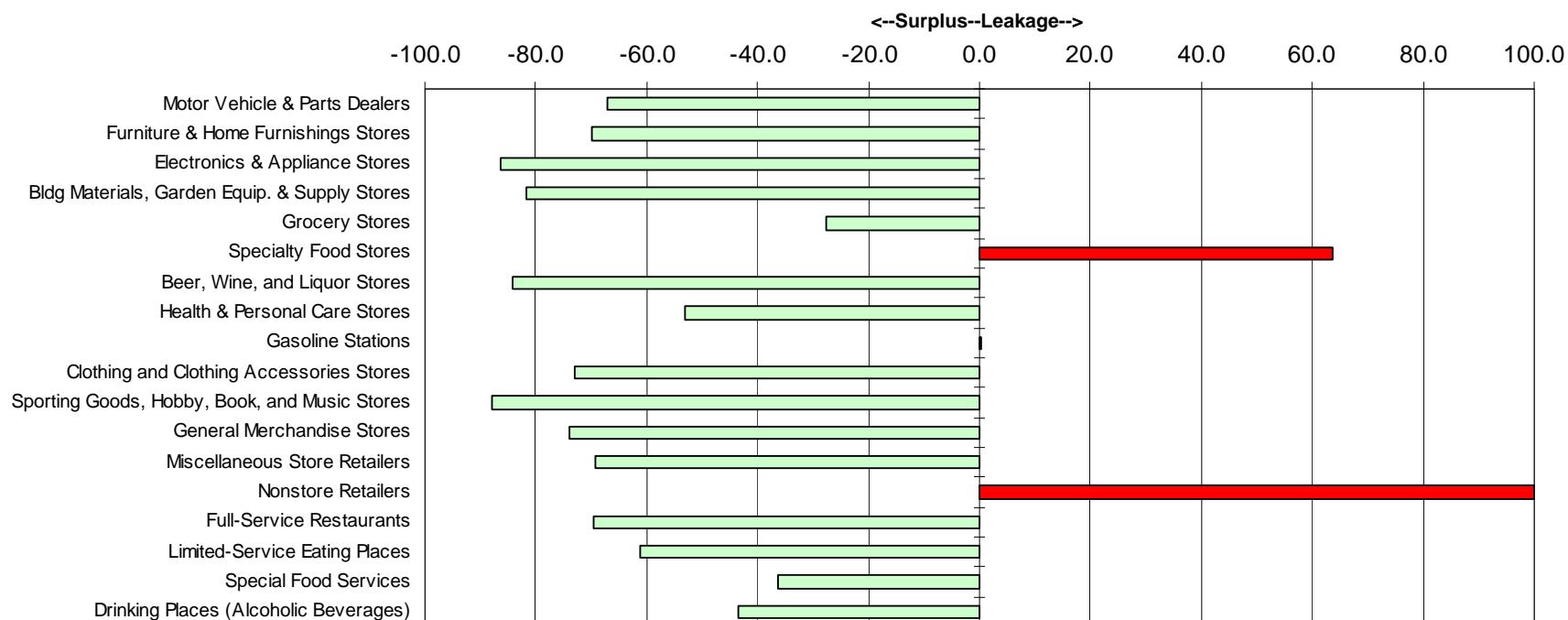
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$39,020,400	\$178,393,072	-\$139,372,672	-64.1	106
Total Retail Trade (NAICS 44-45)	\$33,529,289	\$155,443,577	-\$121,914,288	-64.5	78
Total Food & Drink (NAICS 722)	\$5,491,111	\$22,949,495	-\$17,458,384	-61.4	28

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Hayden Island-Bridgeton Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

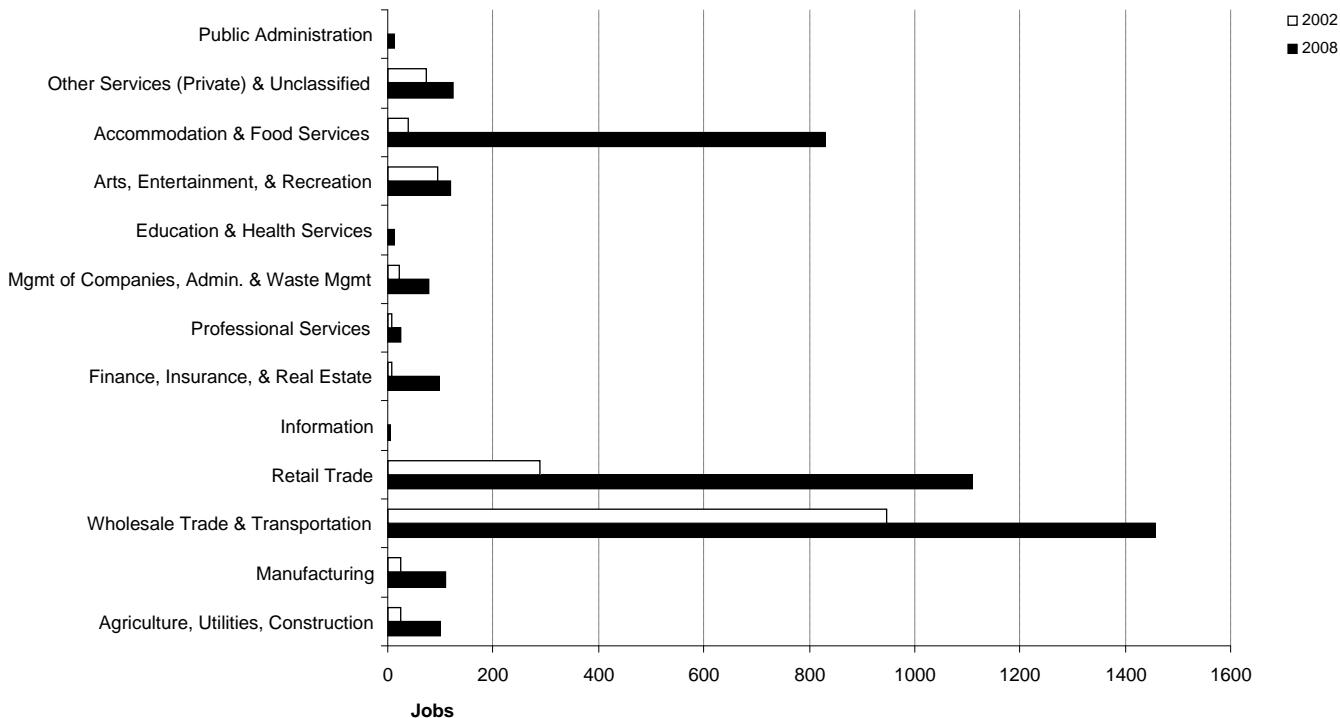
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

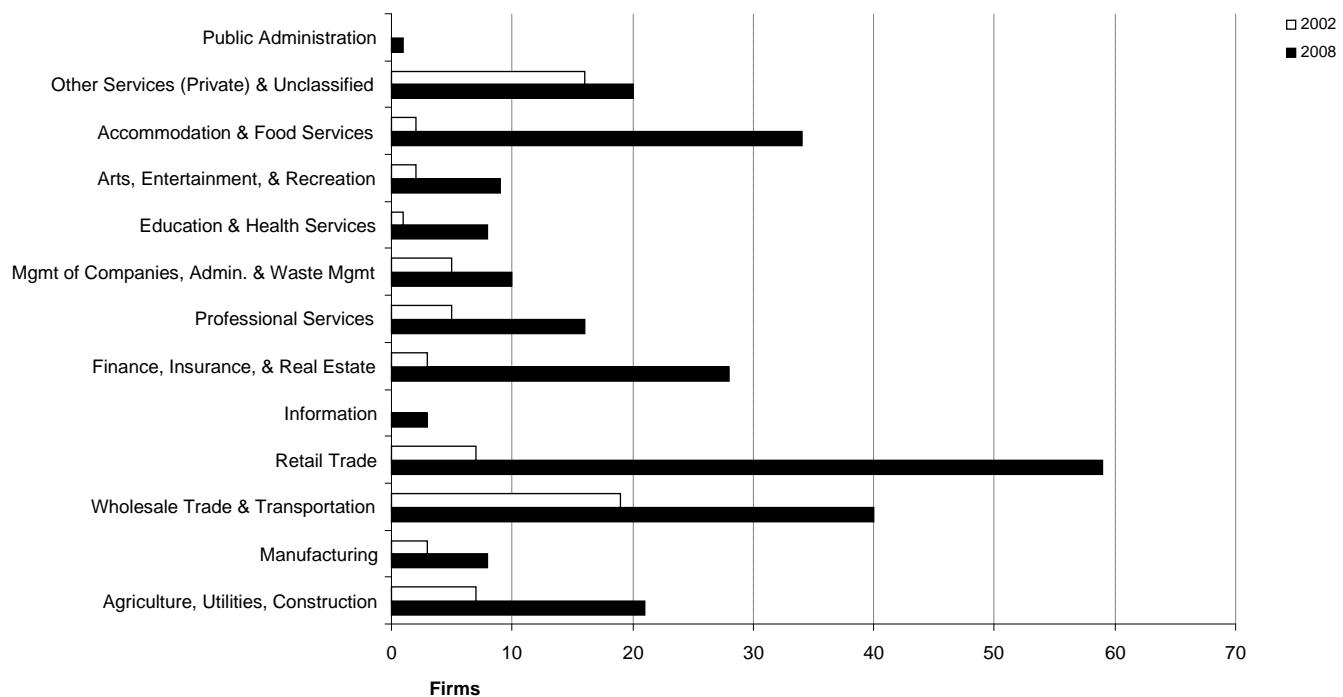
*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	1,527	4,079	+2,552
Total Firms	70	257	+187
Average Annual Wages	\$38,677	\$33,285	+\$5,392

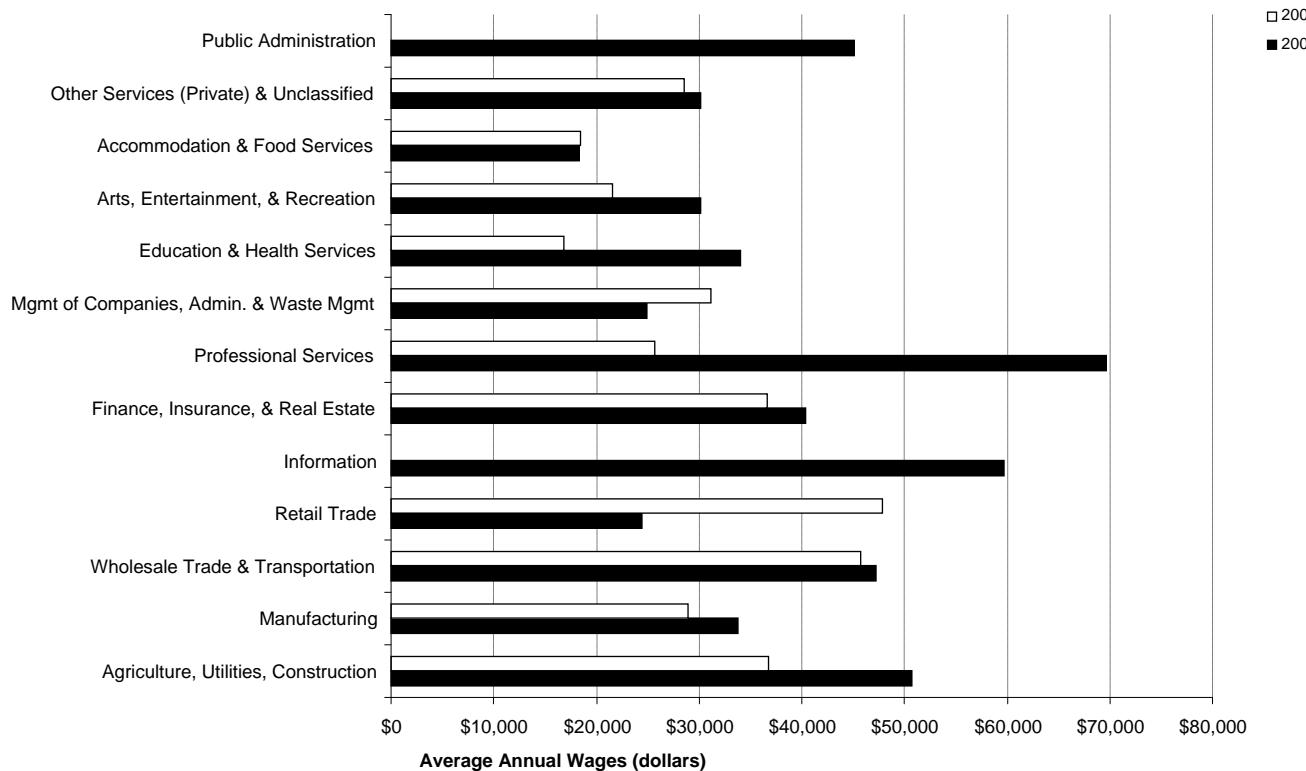
### Total Jobs



### Total Firms



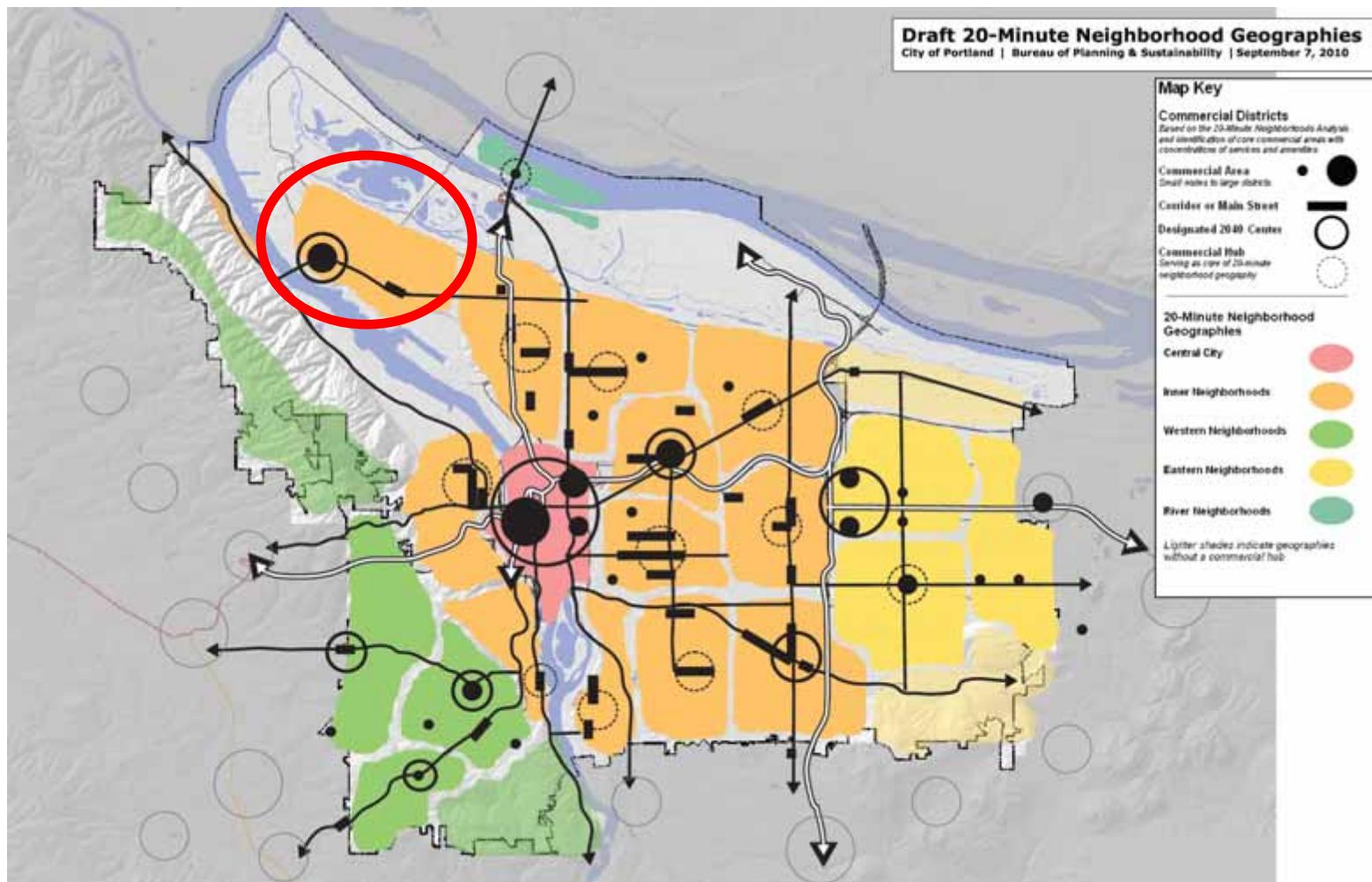
### Average Annual Wages





**4****St. Johns Analysis Area**

*Including Cathedral Park, Portsmouth, St. Johns, University Park, and parts of the Arbor Lodge and Kenton neighborhoods*

**Services, Demographics and Market Summary****20-Minute Neighborhoods Analysis**

DRAFT June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# St. Johns Analysis Area

## Services and Amenities

*Population: 32,500 people (12,000 households)  
Land Area: 4.3 square miles (7,600 people per sq. mile)*

### Commercial Districts

The area's largest concentration of commercial services is along North Lombard in the St. Johns town center. There are smaller clusters of commercial services elsewhere along North Lombard, particularly east of North Portsmouth Avenue.

**Grocery stores:** 4 (1 store per 3,000 households)

**Retail gap:** \$95 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	91%
Within 1/2 mile of a public elementary school:	45%
Within 3 miles of a full-service community center*:	100%
Within 1/2 mile of a full-service grocery store:	14%
Within 1/4 mile of a frequent service transit stop:	65%

\*Parks Bureau service standard

**Community Centers:** 2 (University Park [full service] and St. Johns community centers)

**Libraries:** 1 (St. Johns Library)

**Parks and Open Spaces:** 229 acres - including Cathedral, Columbia, McCoy, McKenna, Northgate, Portsmouth, St. Johns, University, Chimney, and Pier parks.

**Tree Canopy Coverage:** 22%

**Public Schools:** 1 high school (Roosevelt)

6 K-8 schools (James John, Rosa Parks and Sitton elementary schools, Astor and Cesar Chavez K-8 schools, George Middle School)

**Colleges (campus):** 1 (University of Portland)

**Hospitals:** None

**Farmers Markets:** 1 (St. Johns Farmers Market)

**Transit Centers/Stations:** None

**Walkable Access Score:** 43 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Cathedral Park, Portsmouth, St. Johns, University Park, and parts of Arbor Lodge and Kenton

**Business Associations:** North Portland and St. Johns business associations, Columbia Corridor Association

## Urban Form Characteristics

Much of this area is composed of a varied grid of residential blocks, originally developed during the Streetcar Era, with a continuous system of sidewalks. Lombard Street is the area's primary commercial corridor and includes a mix of traditional main street areas with street-fronting buildings and more auto-oriented development with surface parking lots. Much of the area is located on a bluff above the Willamette riverfront, and is bounded to the west and north by industrial areas and the Columbia Slough.

**Access issues.** Good street and sidewalk connectivity, but the North Portland railway cut serves as a barrier. Relatively good access to transit, and areas around the St. Johns town center have good access to commercial and community services. Access to commercial services is not as good east of the railway cut (including areas with concentrations of multifamily development around New Columbia).

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

St. Johns Town Center:	294 acres
Main Streets:	1.5 miles (Lombard)
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,136	58%	138
Multi-Family Residential:	358	18%	171
Commercial/Mixed-Use:	133	7%	41
Employment:	61	3%	20
Industrial:	56	3%	40
Open Space:	220	11%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

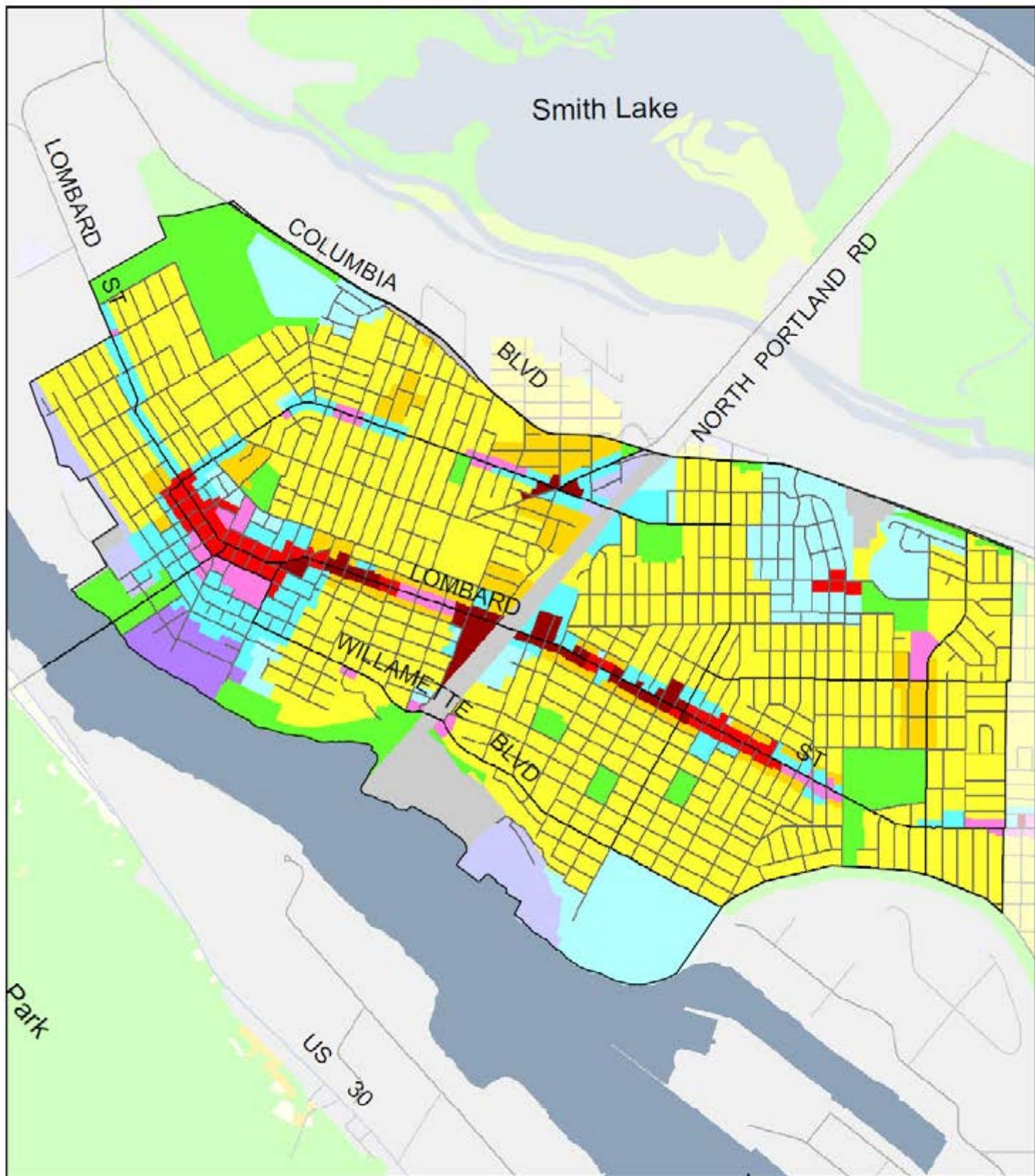
2010 Housing Units (Census):	12,367
2035 Housing Units:	16,400

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# St. Johns Analysis Area



## Comprehensive Plan Designations

February 1, 2012

G:\mayor\_office\zoo\_mir\_zho\_profiles\complan\final.mxd

### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000  
Feet

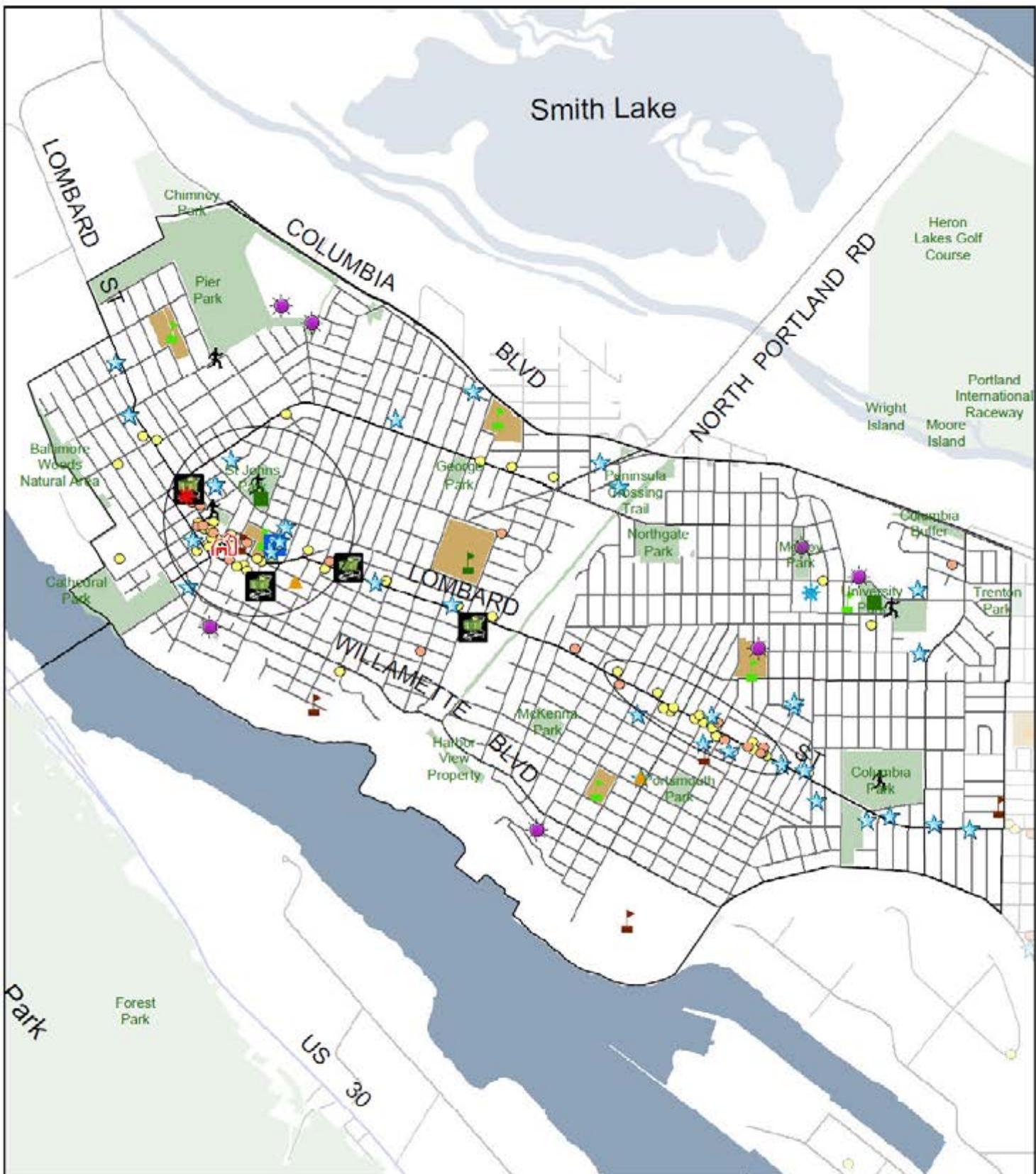


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Innovation. Collaboration. Practical Solutions.



City of Portland, Oregon  
Sam Adams, Mayor • Jason Anderson, Director

# St. Johns Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

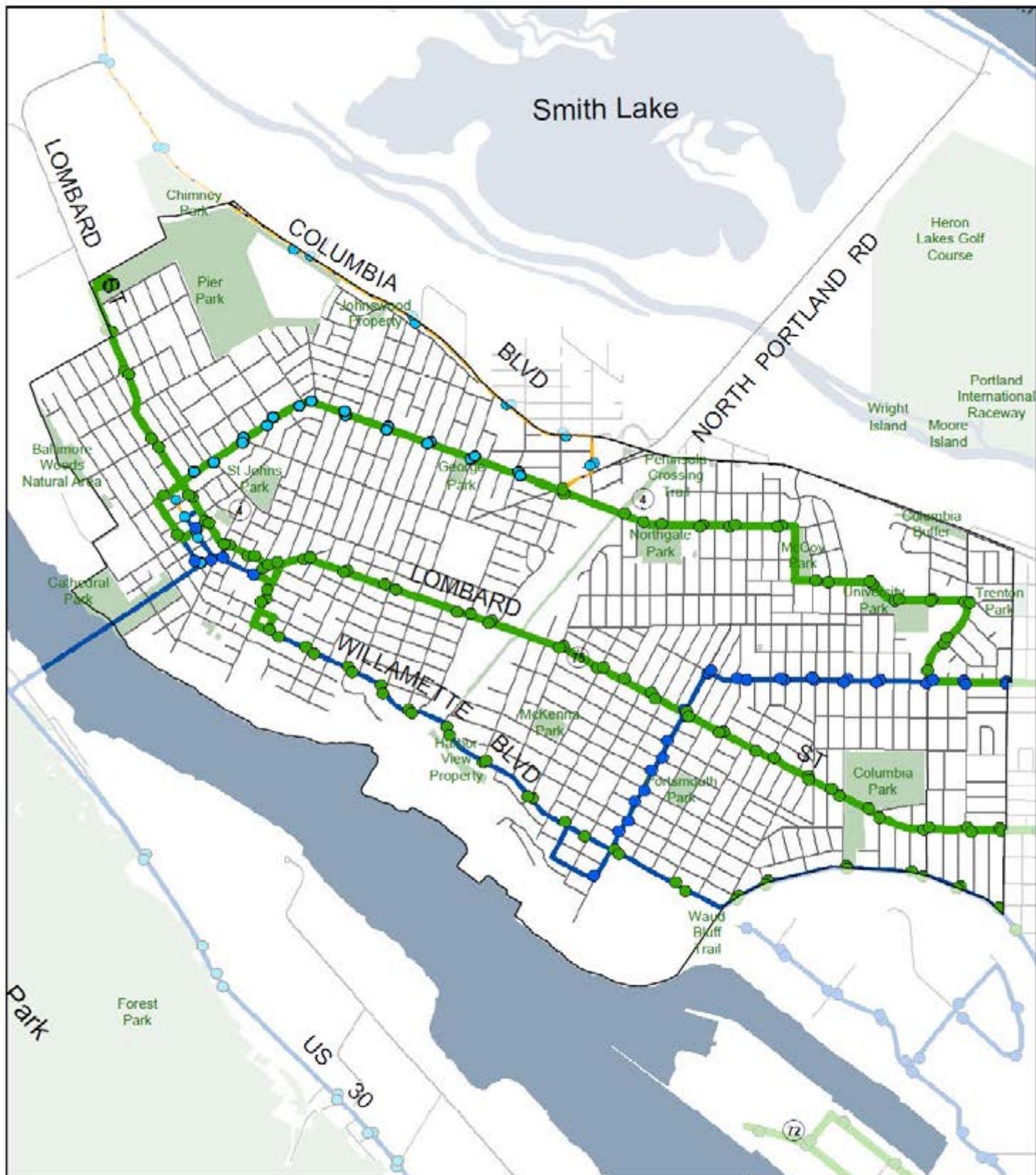
- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Farmer's Markets
- Community Gardens
- Preschools
- Daycare Centers
- Public HS
- Public K-8
- Private Schools
- County Health Clinic
- County Aging Services



0 1,000 2,000 3,000 Feet



# St. Johns Analysis Area



## Transit Infrastructure

February 1, 2012

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Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX	Rush Hour Stops
Streetcar	

MAX	Standard Service	Bus	Frequent Stops
MAX	Standard Service	Bus	Frequent Stops
Street Car	Standard Service	Bus	Standard Stops
MAX	Rush Hour Only Service	Bus	Rush Hour Stops
Streetcar		Bus	

— City Boundary



0 1,000 2,000 3,000 Feet

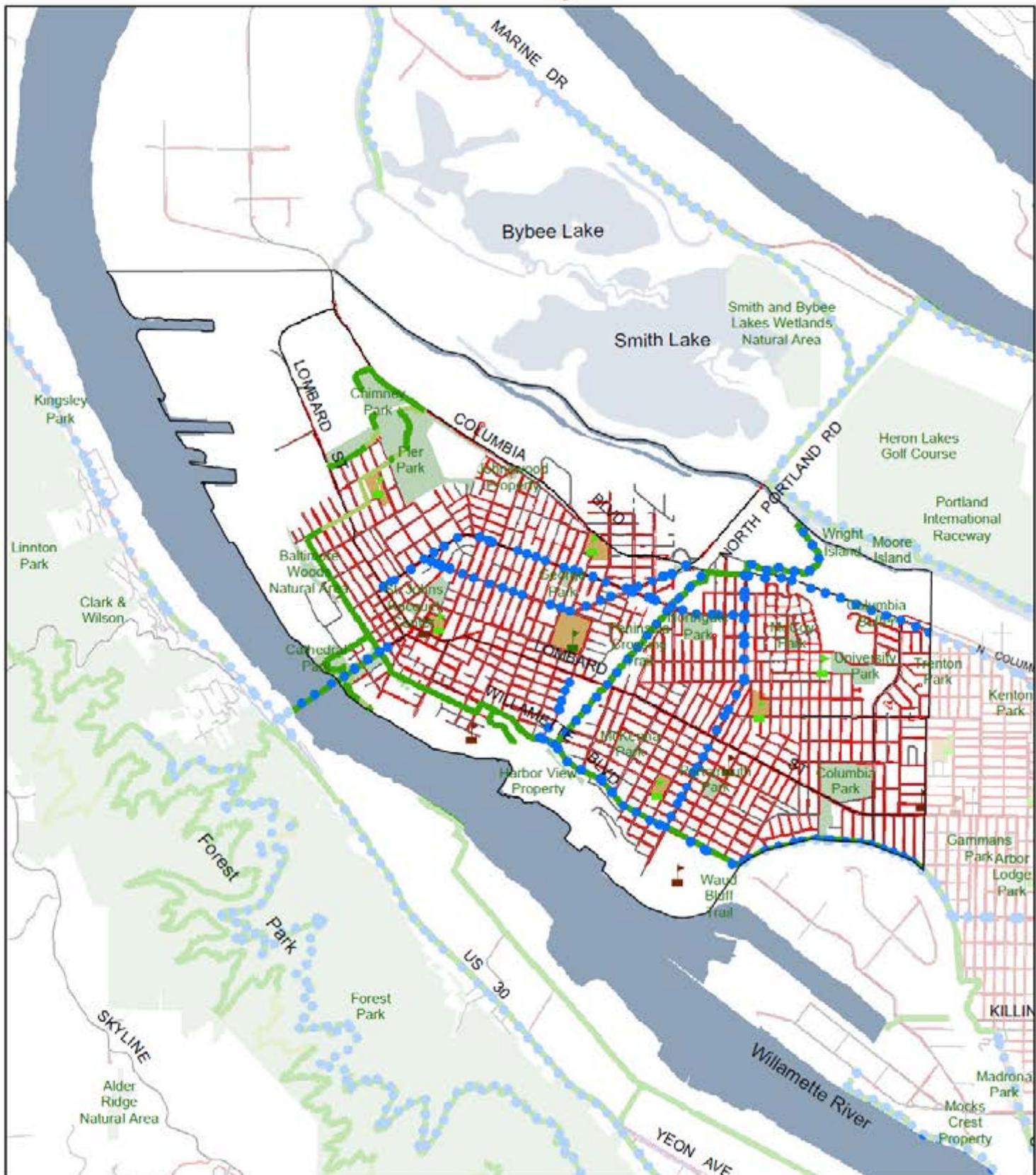


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City of Portland, Oregon  
John Adams, Mayor • Jason Anderson, Director

# St. Johns Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

GM\mayor\_Office\20\_min\_chn\_profiles\sidewalks\_Bikelane

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000  
Feet

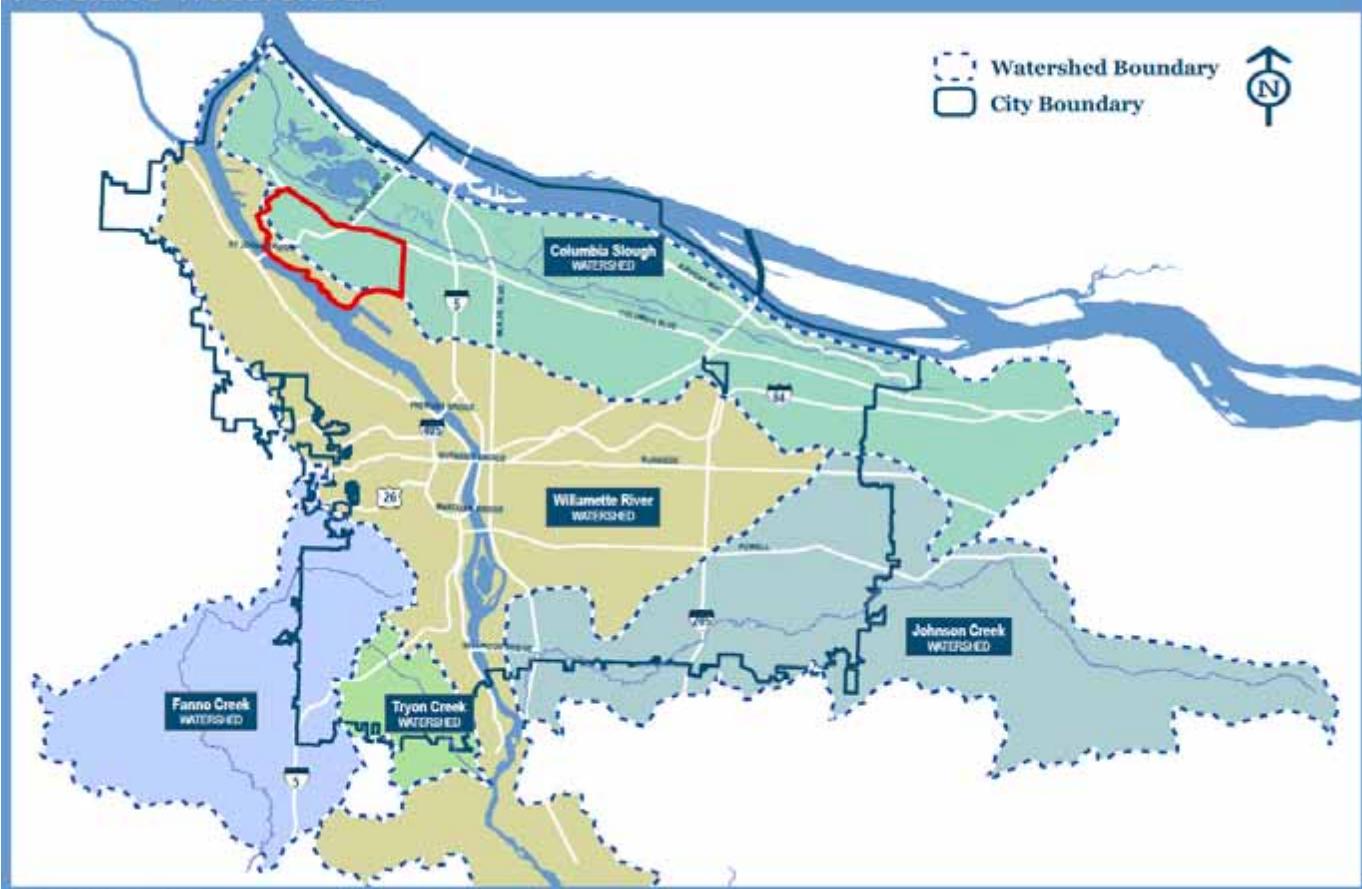


Bureau of Planning and Sustainability  
Innovative Collaboration Practical Solutions

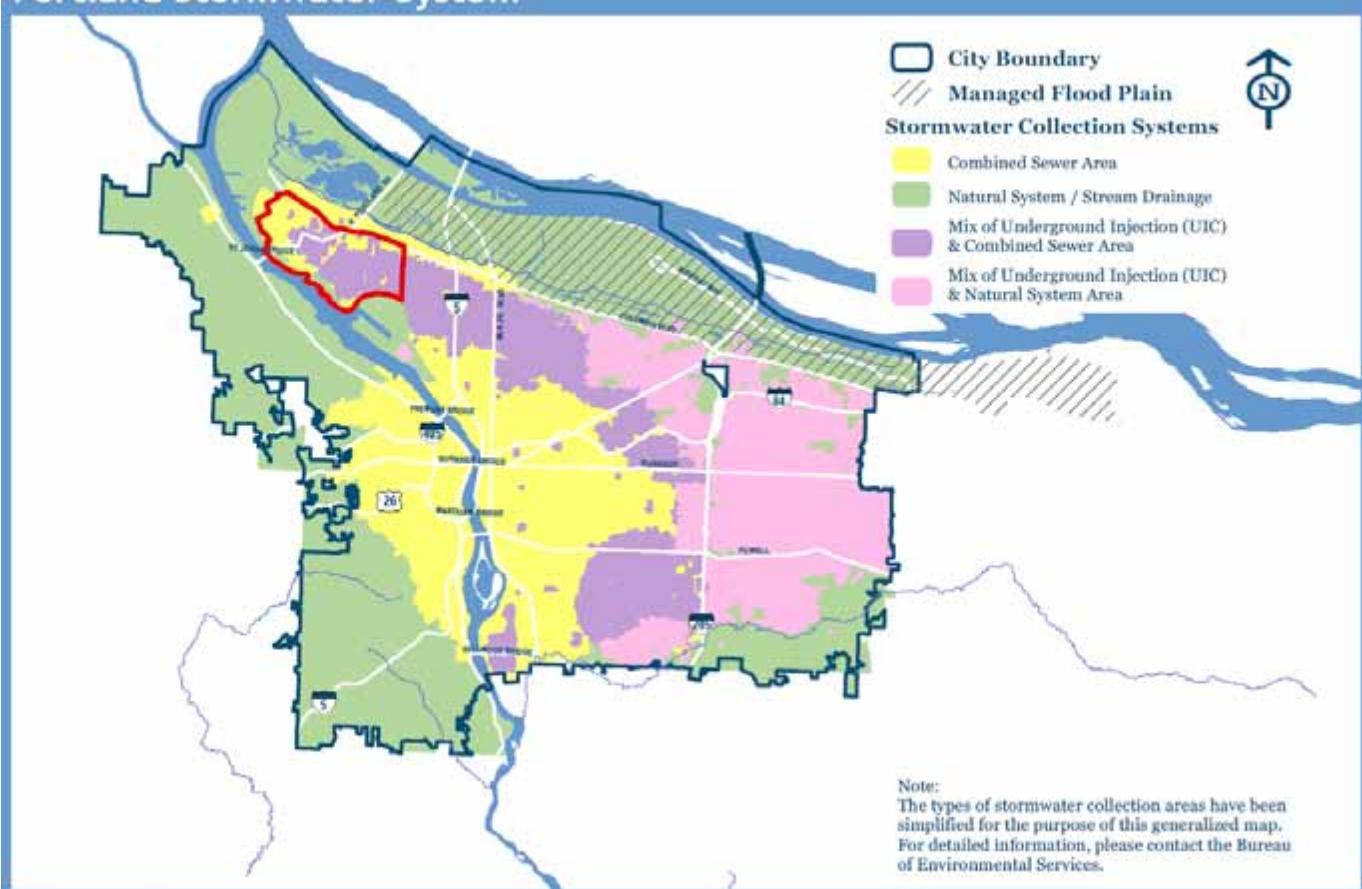


City of Portland Oregon  
Sam Adams Mayor - Sean Adams Director

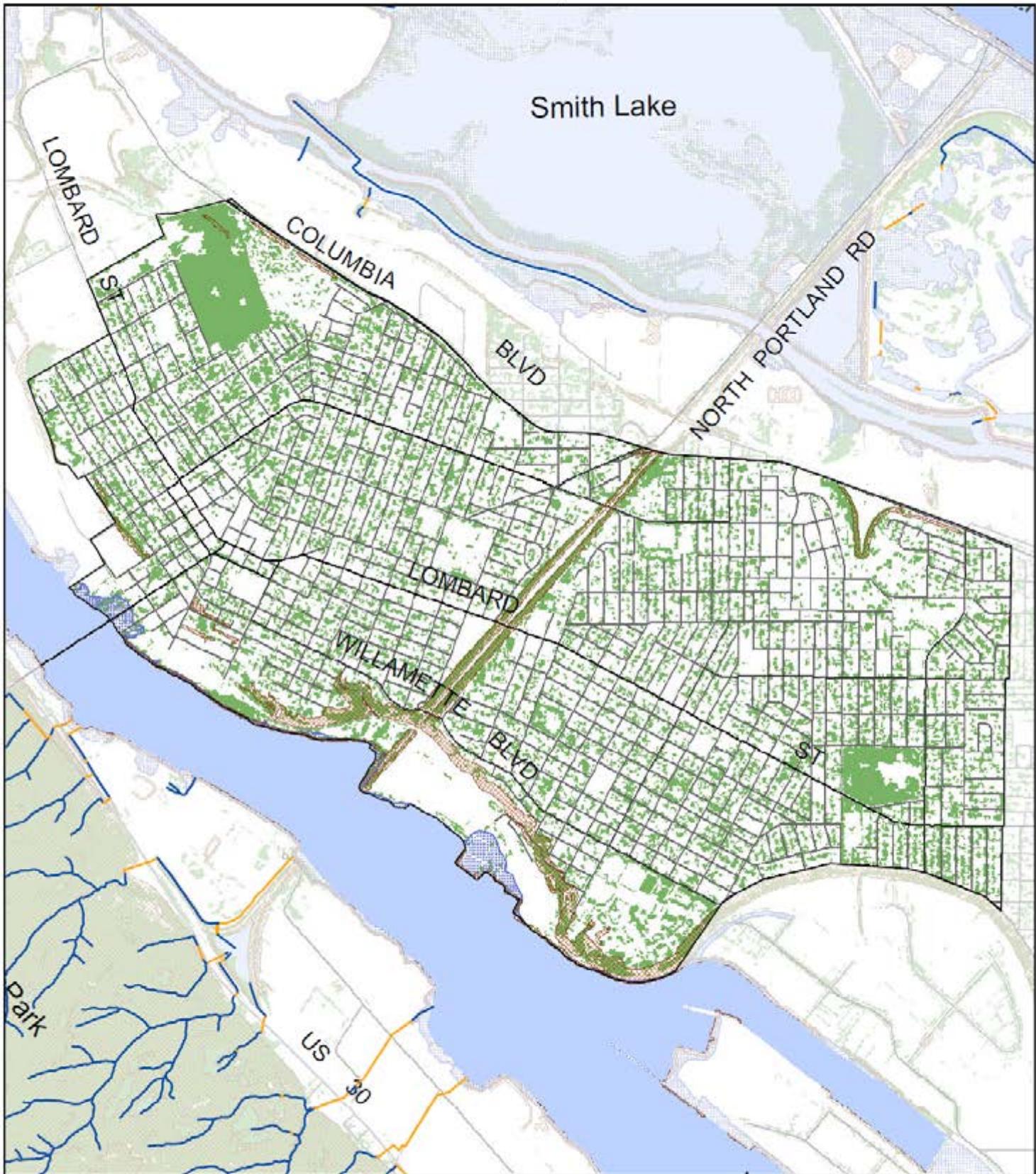
## Portland Watersheds



## Portland Stormwater System



# St. Johns Analysis Area



## Watersheds and Natural Features

February 1, 2012

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



# St. Johns Analysis Area

## Demographics (2000 – 2010)

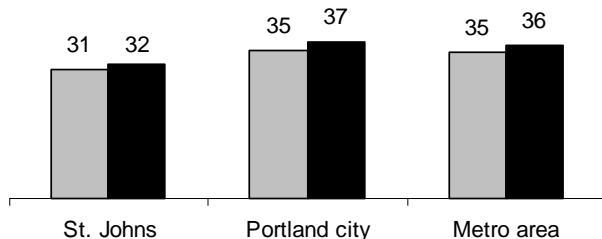
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

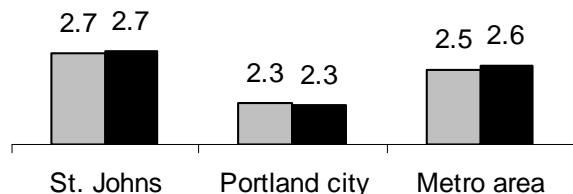
	St. Johns	Portland city	Metro area
2010	32,462	583,776	2,226,009
2000	28,977	529,121	1,927,881
% change	12%	10%	15%

■ 2000 ■ 2010

### Median Age

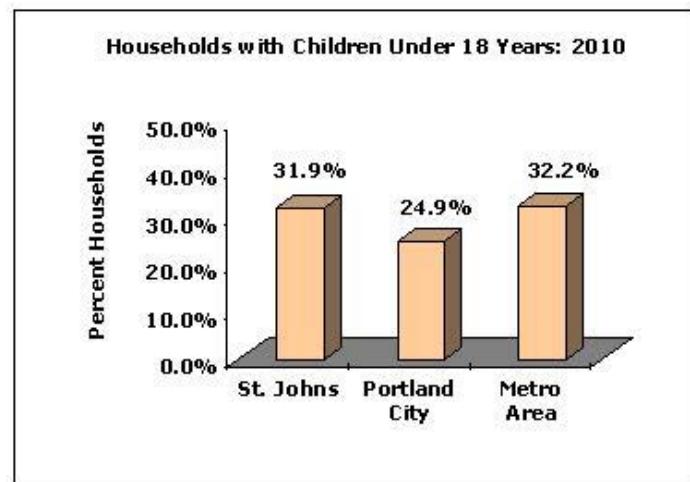
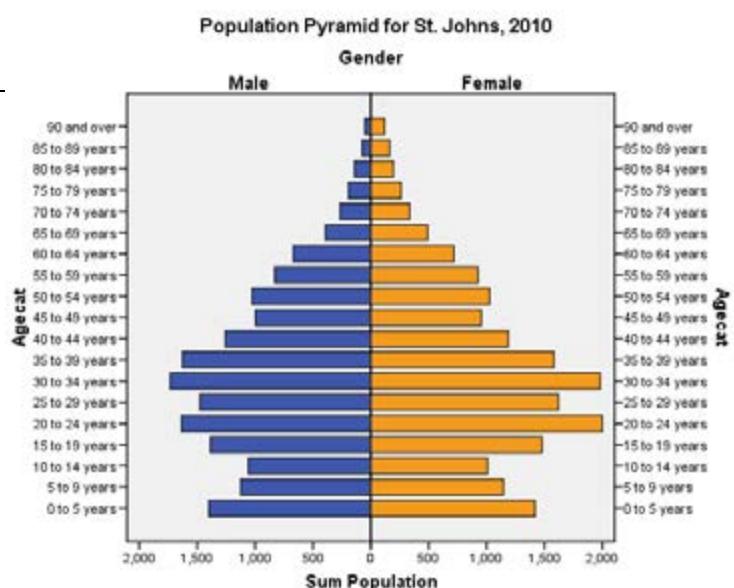
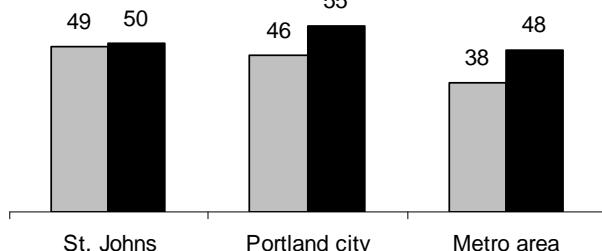


### Average Household Size

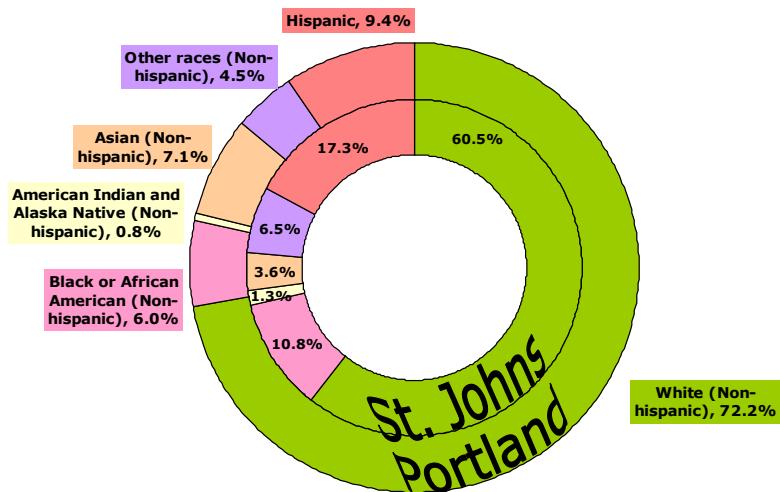


### Diversity Index

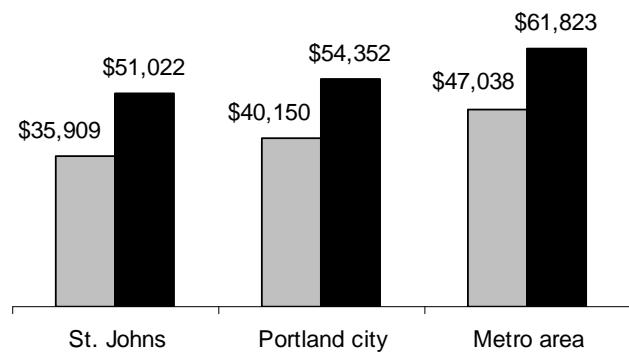
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



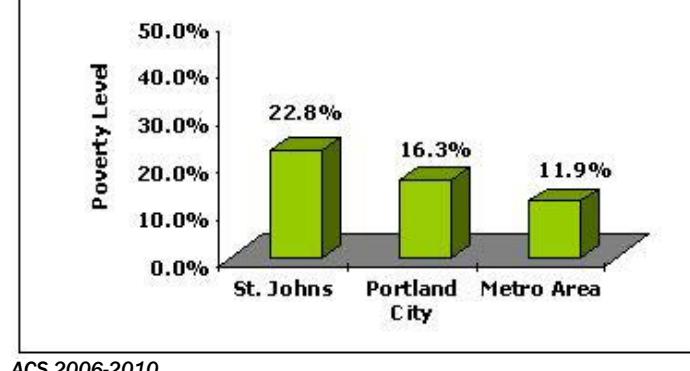
### Racial and Ethnic Distribution in Portland vs. St. Johns



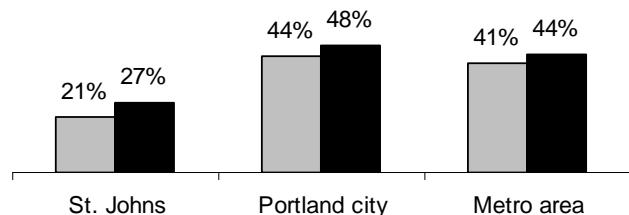
## Median Household Income



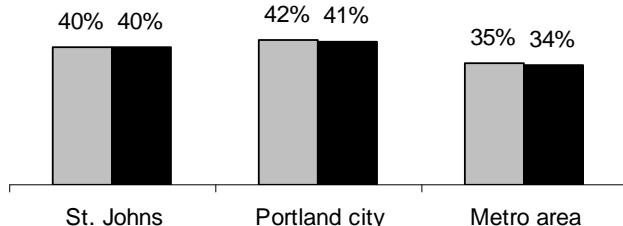
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	St. Johns	Portland city	Metro area
2010	\$192,095	\$253,184	\$273,500
2000	\$122,775	\$154,721	\$168,347
% change	56.5%	63.6%	62.5%

# St. Johns Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

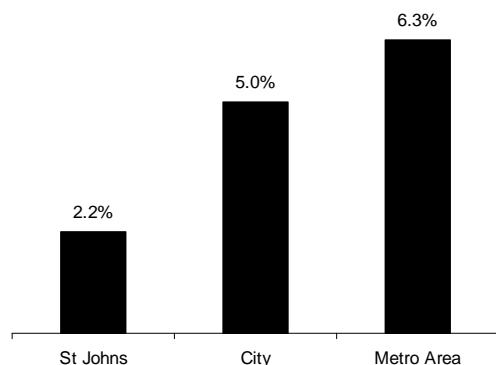
St Johns	City	Metro Area
1,078,053	51,937,895	107,875,146

### OFFICE SPACE

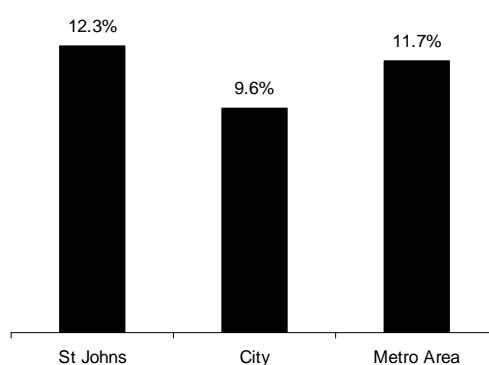
#### Square Feet

St Johns	City	Metro Area
268,921	54,348,765	92,465,455

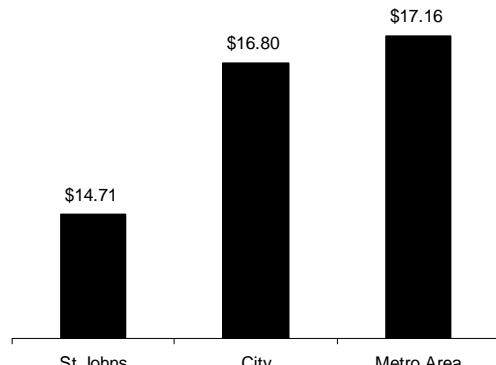
#### Retail Vacancy



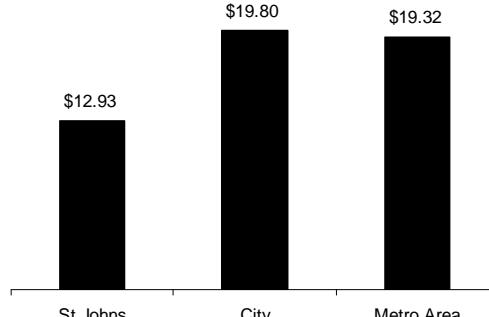
#### Office Vacancy



#### Retail Rents



#### Office Rents



# St. Johns Analysis Area

## Retail Market Profile

**Retail Gap = \$95 million**

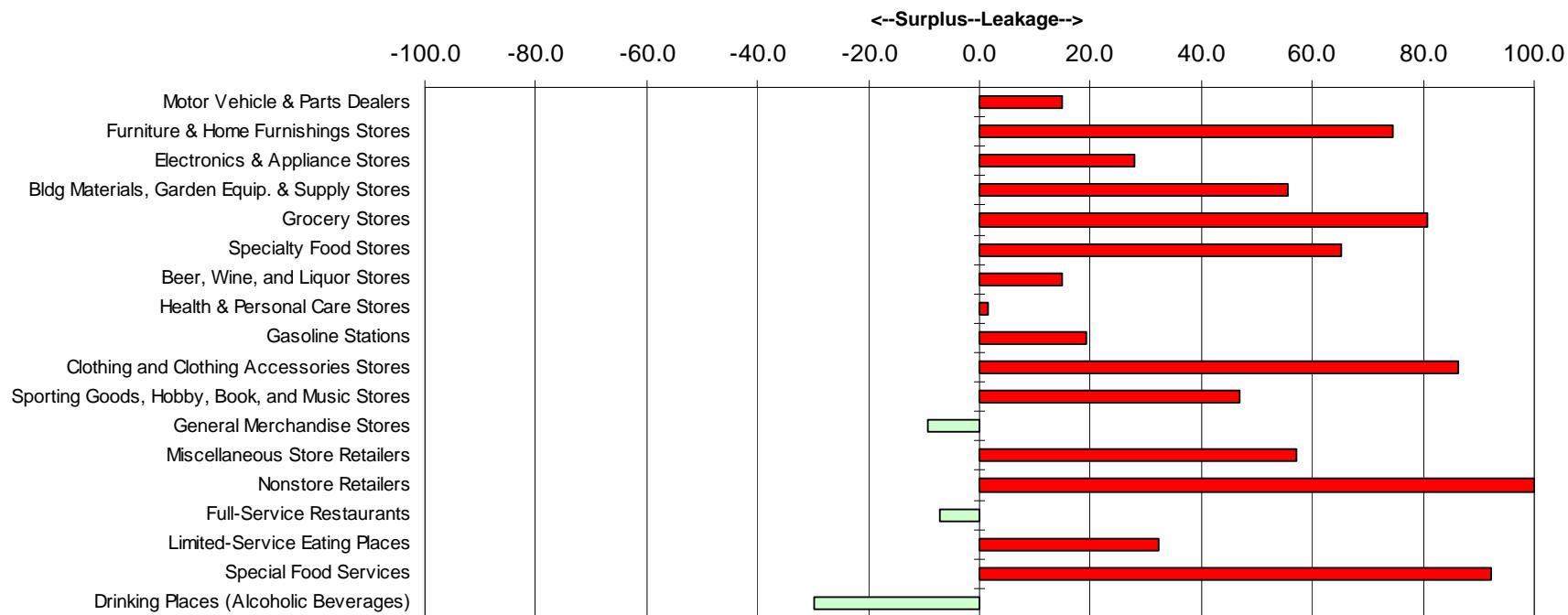
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$233,891,636	\$138,672,905	\$95,218,731	25.6	150
Total Retail Trade (NAICS 44-45)	\$199,628,463	\$111,606,443	\$88,022,020	28.3	92
Total Food & Drink (NAICS 722)	\$34,263,173	\$27,066,462	\$7,196,711	11.7	58

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# St. Johns Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

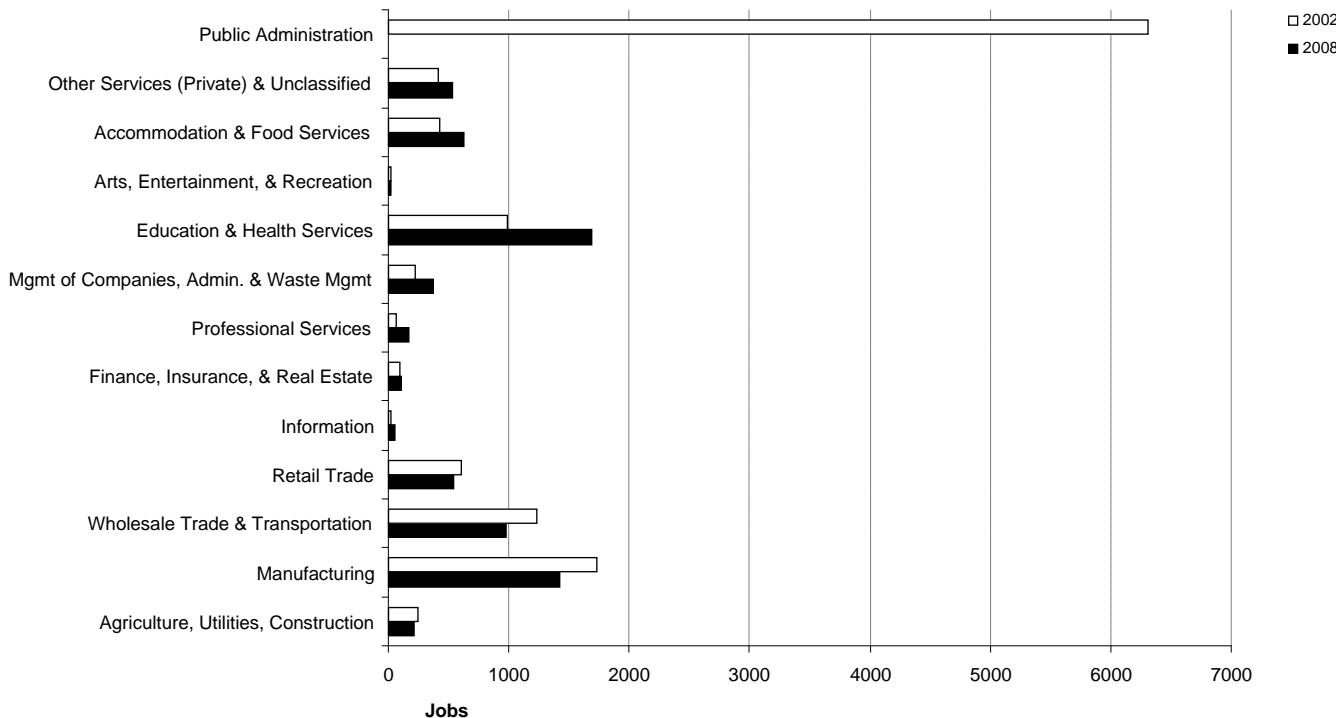
Source: Oregon Employment Department (OED)

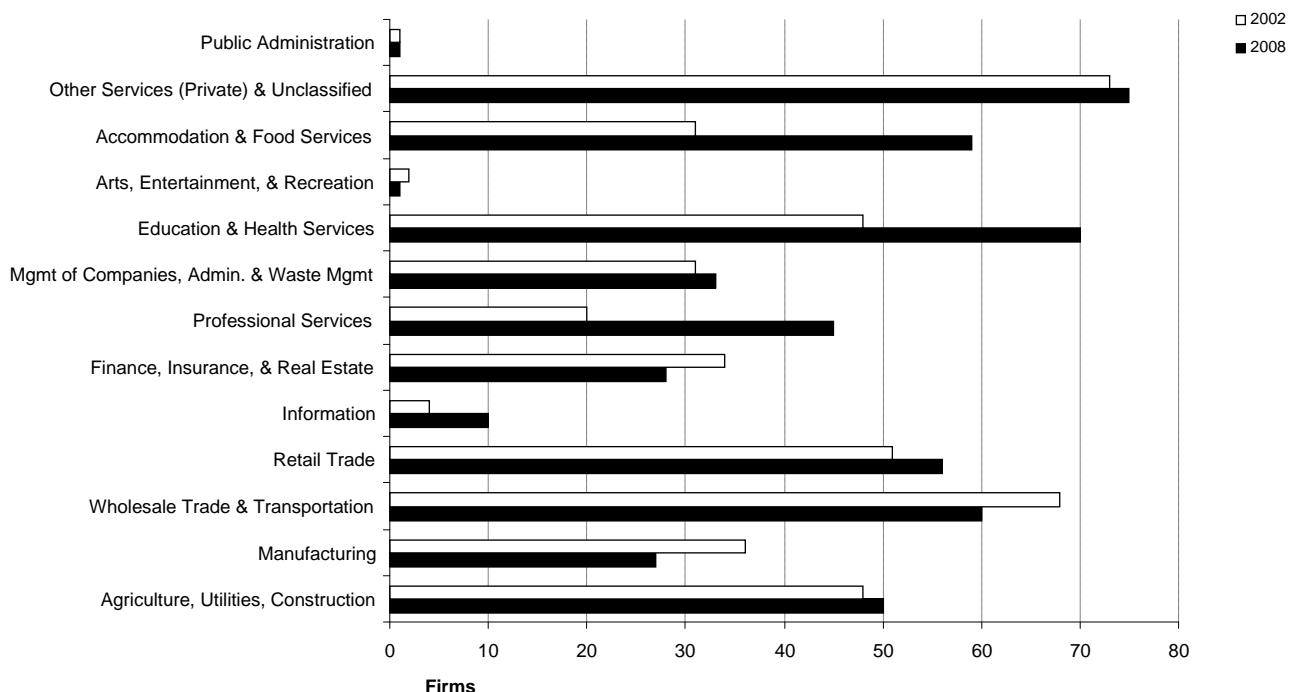
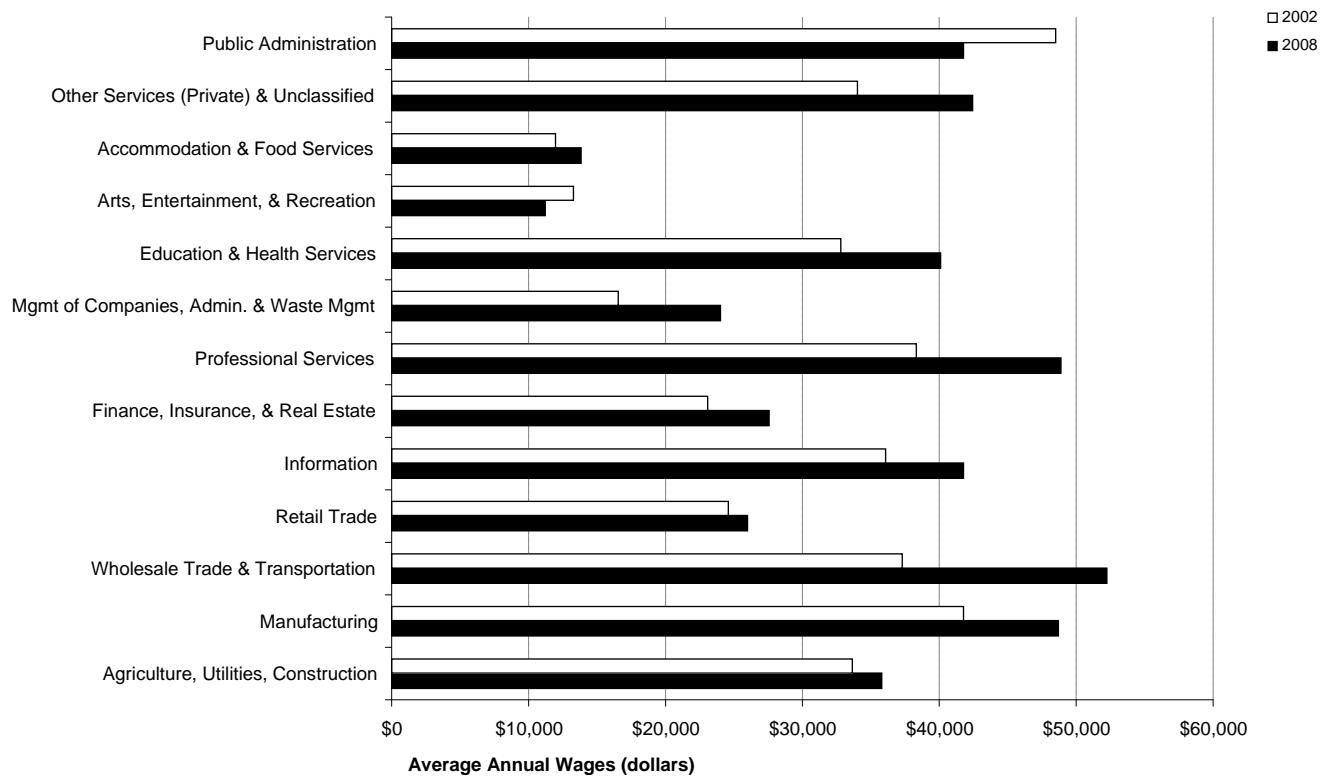
*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	12,384	6,727	- \$5,647
Total Firms	447	515	+68
Average Annual Wages	\$41,097	\$39,184	- \$1,913

### Total Jobs



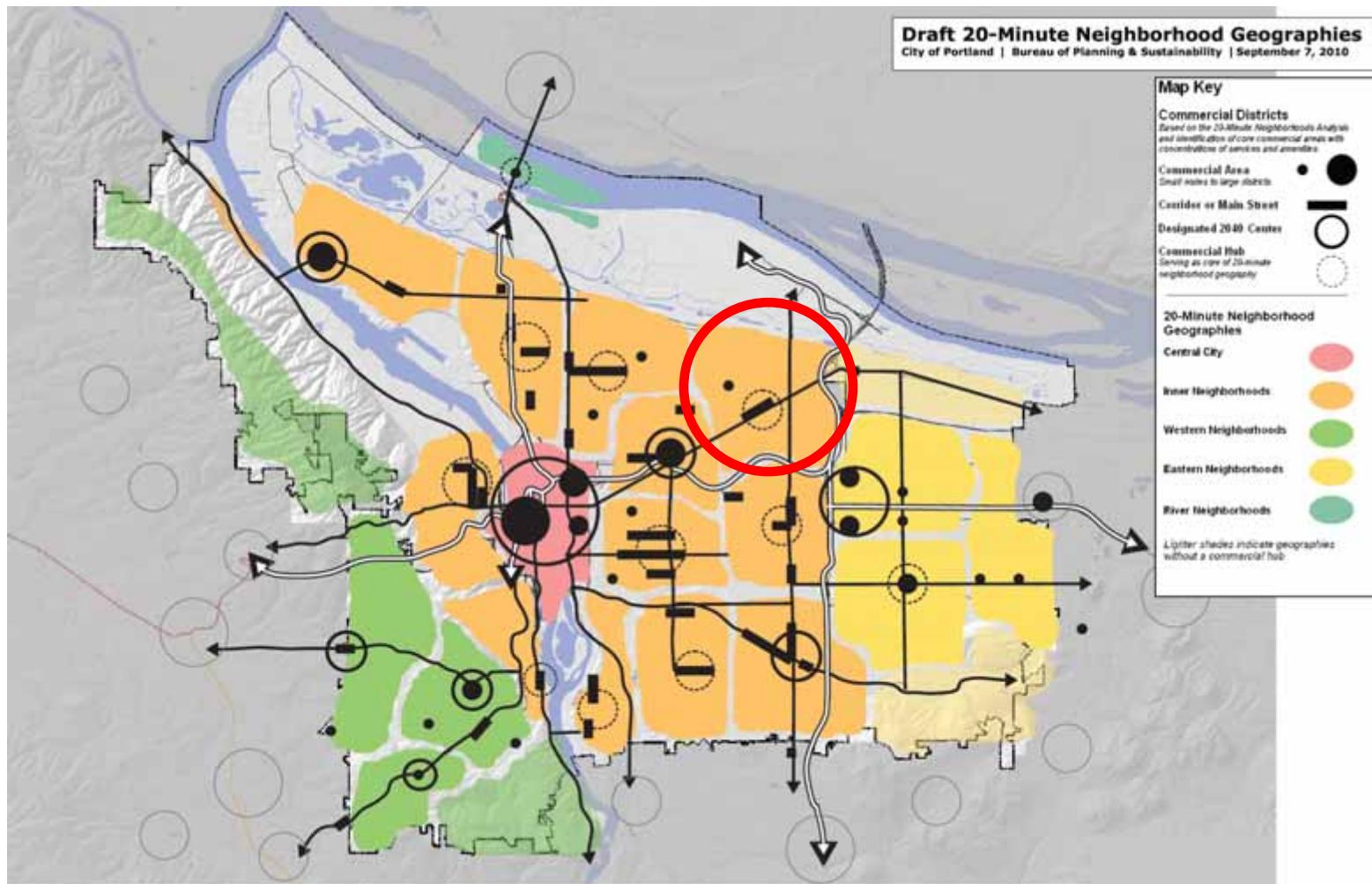
**Total Firms****Average Annual Wages**



## Roseway-Cully Analysis Area

Including Cully, Madison South, Rose City Park, Roseway, and Sumner neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Roseway-Cully Analysis Area

## Services and Amenities

*Population: 34,300 people (13,900 households)  
Land Area: 5.8 square miles (5,900 people per sq. mile)*

### Commercial Districts

The largest concentration of commercial services is in the Portland International District along Sandy Boulevard, centered around 72<sup>nd</sup> Avenue. Secondary commercial areas are located at NE Prescott and Cully, along NE 82<sup>nd</sup> Avenue, and at the area's western edge along NE 42<sup>nd</sup> Avenue.

**Grocery stores:** 2 (1 store per 6,950 households)

**Retail gap:** \$94 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	73%
Within 1/2 mile of a public elementary school:	34%
Within 3 miles of a full-service community center*:	72%
Within 1/2 mile of a full-service grocery store:	17%
Within 1/4 mile of a frequent service transit stop:	47%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** 1 (Gregory Heights Library)

**Parks and Open Spaces:** 341 acres - including Rose City Golf Course, Rocky Butte, Normandale Park, Glenhaven Park, and the Roseway Parkway

**Tree Canopy Coverage:** 19%

**Public Schools:** 1 high school (Madison),  
4 K-8 schools (Lee, Rigler, Roseway Heights, Scott)

**Colleges** (campus): None

**Hospitals:** None

**Farmers Markets:** 1 (Cully Collective Market)

**Transit Centers/Stations:** 3 (Parkrose/Sumner Transit Center, 60<sup>th</sup> Avenue, and 82<sup>nd</sup> Avenue light rail stations – all located at edges of area)

**Walkable Access Score:** 46 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Cully, Madison South, Rose City Park, Roseway, Sumner

**Business Associations:** Portland International District, Parkrose Business Association, 42<sup>nd</sup> Avenue Business Association

## Urban Form Characteristics

This area includes a mix of inner neighborhood characteristics, such as compact blocks with fully-improved streets and sidewalks, and eastern neighborhood characteristics, such as large blocks, streets without sidewalks and unimproved roadways. Commercial streets include some traditional main street areas with street-fronting buildings and more auto-oriented corridors with surface parking lots. Rocky Butte, at the area's eastern edge, is the most prominent topographical feature in the area, which is bordered to the south by the I-84 Freeway and to the north by industrial areas and the Columbia Slough.

**Access issues.** Includes a mix of areas with good street and sidewalk connectivity and other areas (particularly in the Cully neighborhood) with poor street and sidewalk connectivity. Portions of the area lack convenient access to transit and to commercial and community services. Freeways act as barriers to adjacent areas toward the east and south.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	4.2 miles (Sandy, 82 <sup>nd</sup> Avenue, Cully, Killingsworth)
Station Communities:	3

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,646	62%	227
Multi-Family Residential:	276	10%	79
Commercial/Mixed-Use:	125	5%	75
Employment:	189	7%	80
Industrial:	104	4%	1
Open Space:	328	12%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

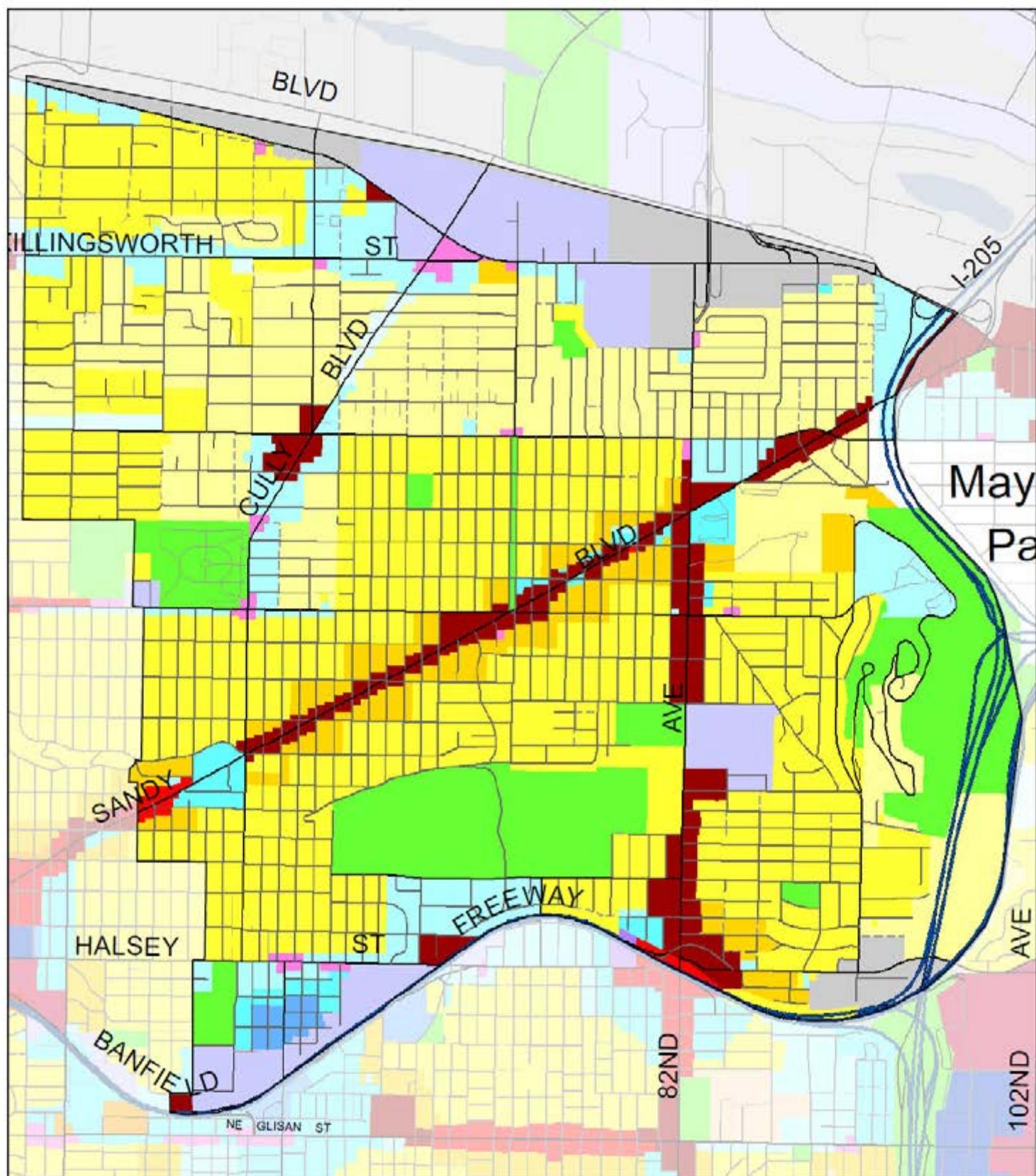
2010 Housing Units (Census):	14,170
2035 Housing Units:	17,400

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Roseway-Cully Analysis Area



## Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Sam Adams, Mayor - Susan Anderson, Director

## Comprehensive Plan Designations

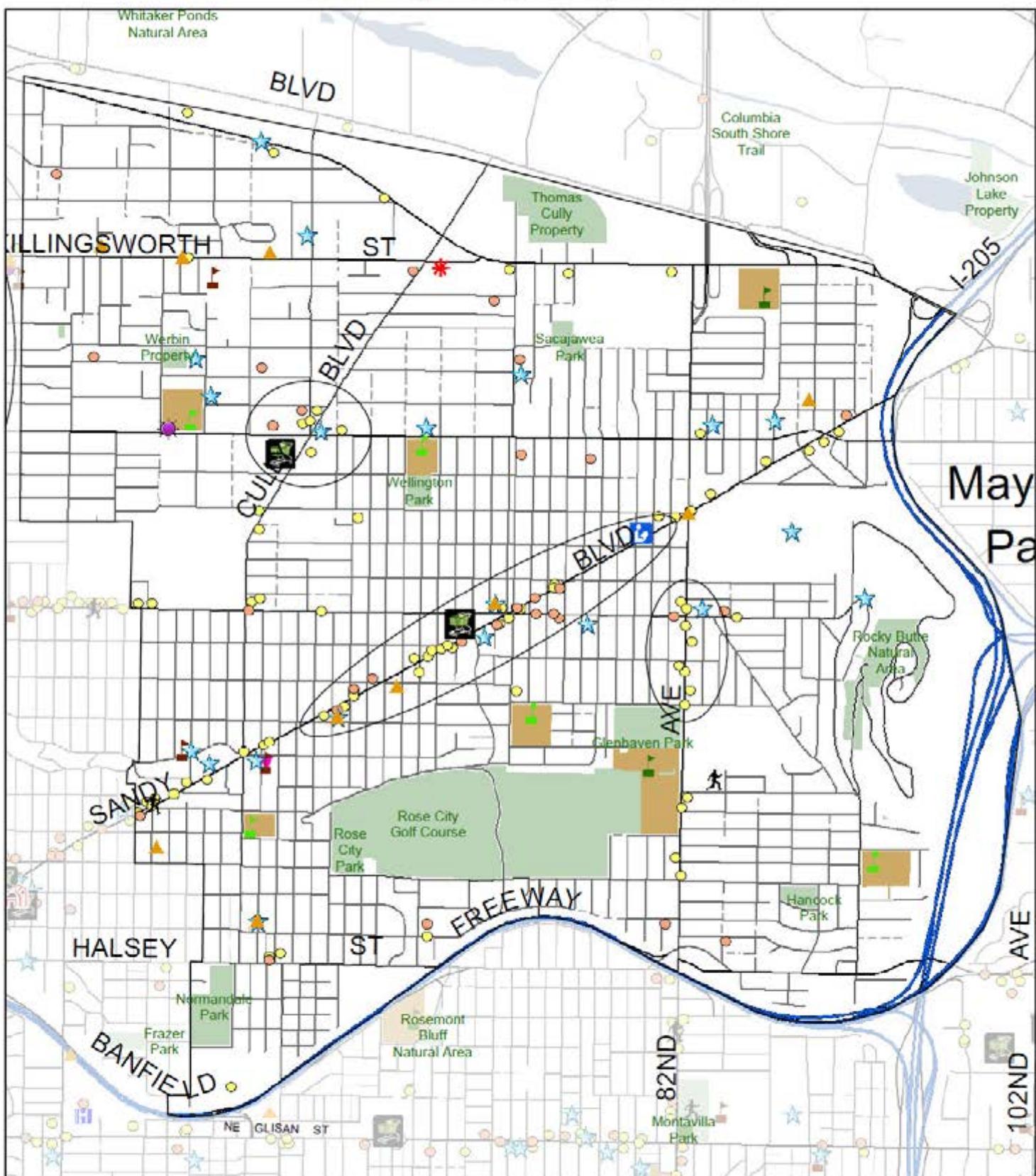
February 1, 2012

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5-4

# Roseway-Cully Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Places of Worship
- ▼ Preschools
- ▲ Daycare Centers
- Farmers Markets
- Fitness Centers
- Grocery Stores
- Community Centers
- Community Gardens
- Public HS
- Public K-8
- Private Schools
- County Health Clinic
- County Aging Services



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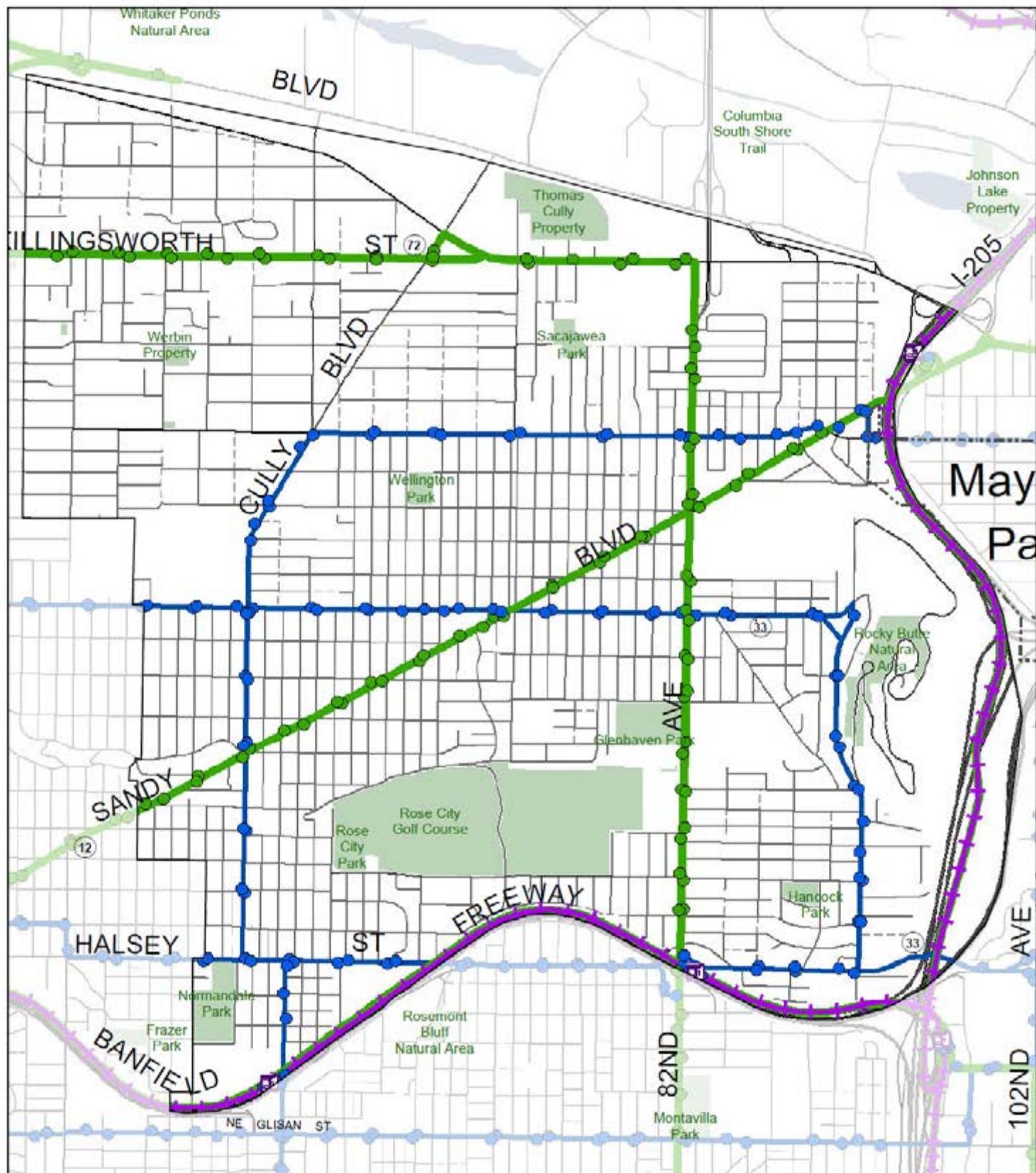


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# Roseway-Cully Analysis Area



## Transit Infrastructure

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Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX Streetcar	Rush Hour Stops
Streelcar	

**Light Rail Services:**

- MAX:** Represented by a green line.
- Standard Service:** Represented by a blue line.
- Rush Hour Only Service:** Represented by a yellow line.
- City Boundary:** Represented by a dashed line.



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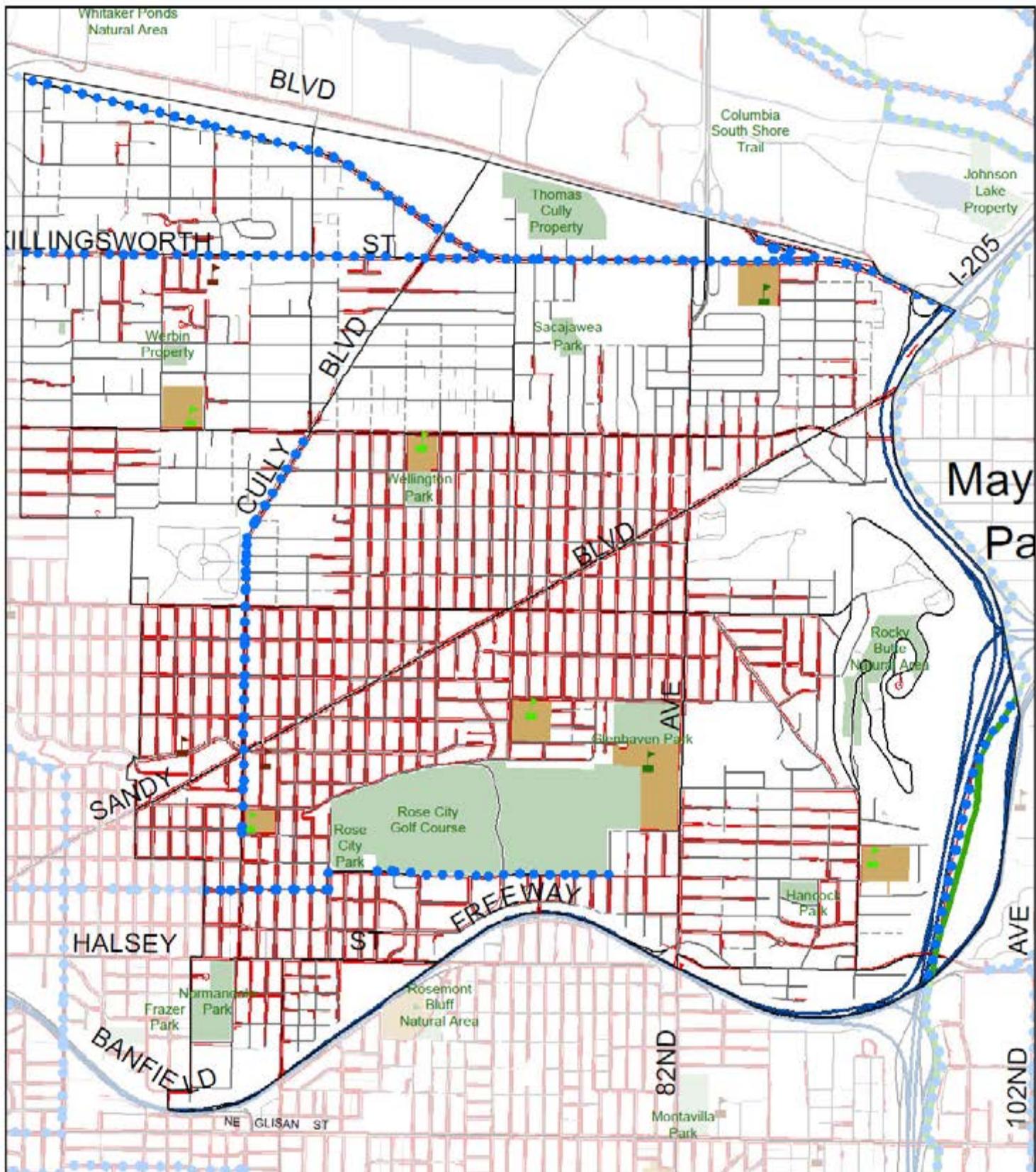


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John Adams, Mayor • Stacey Anderson, Director

# Roseway-Cully Analysis Area



## Sidewalks and Bicycle Infrastructure

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



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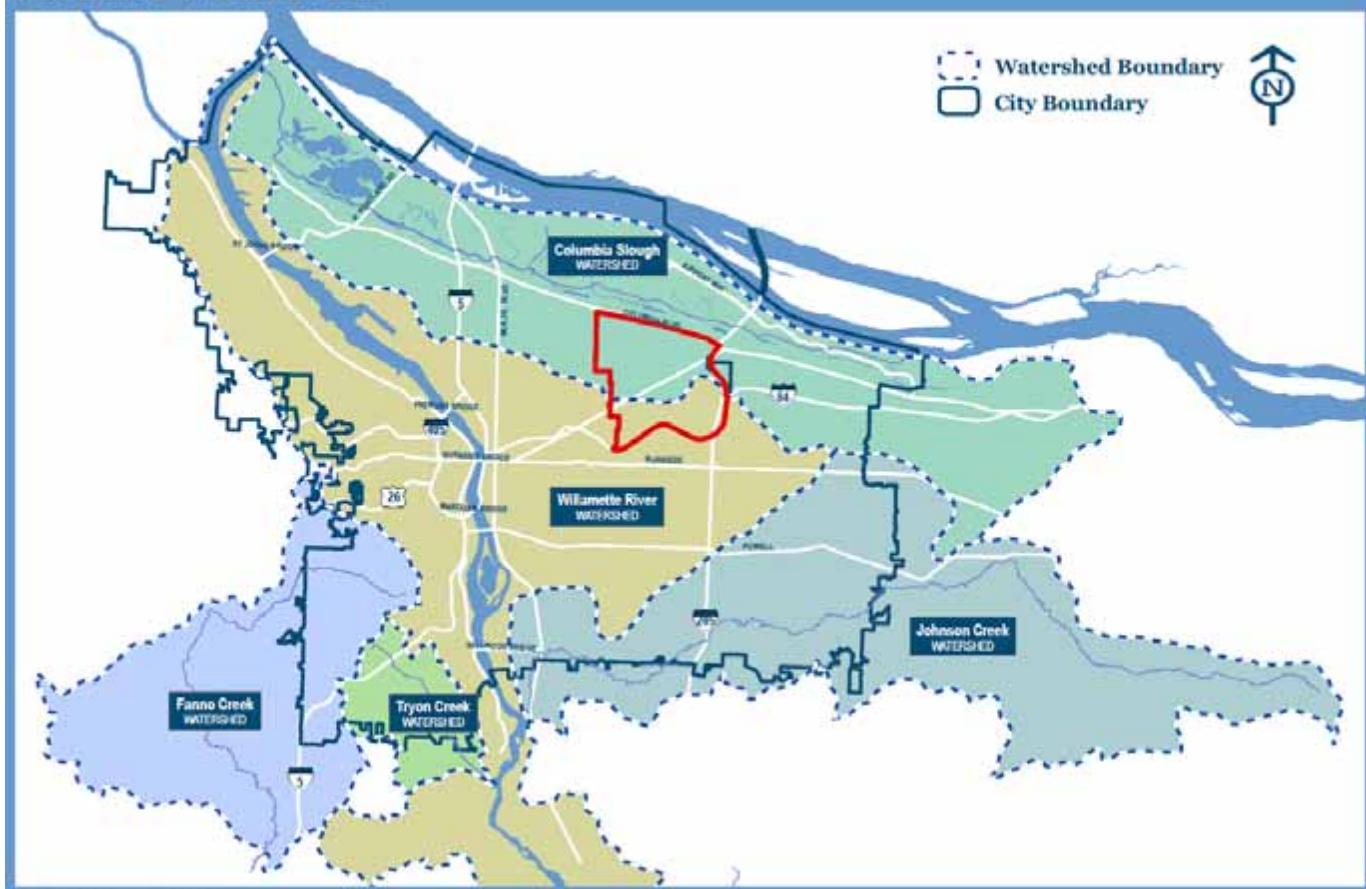


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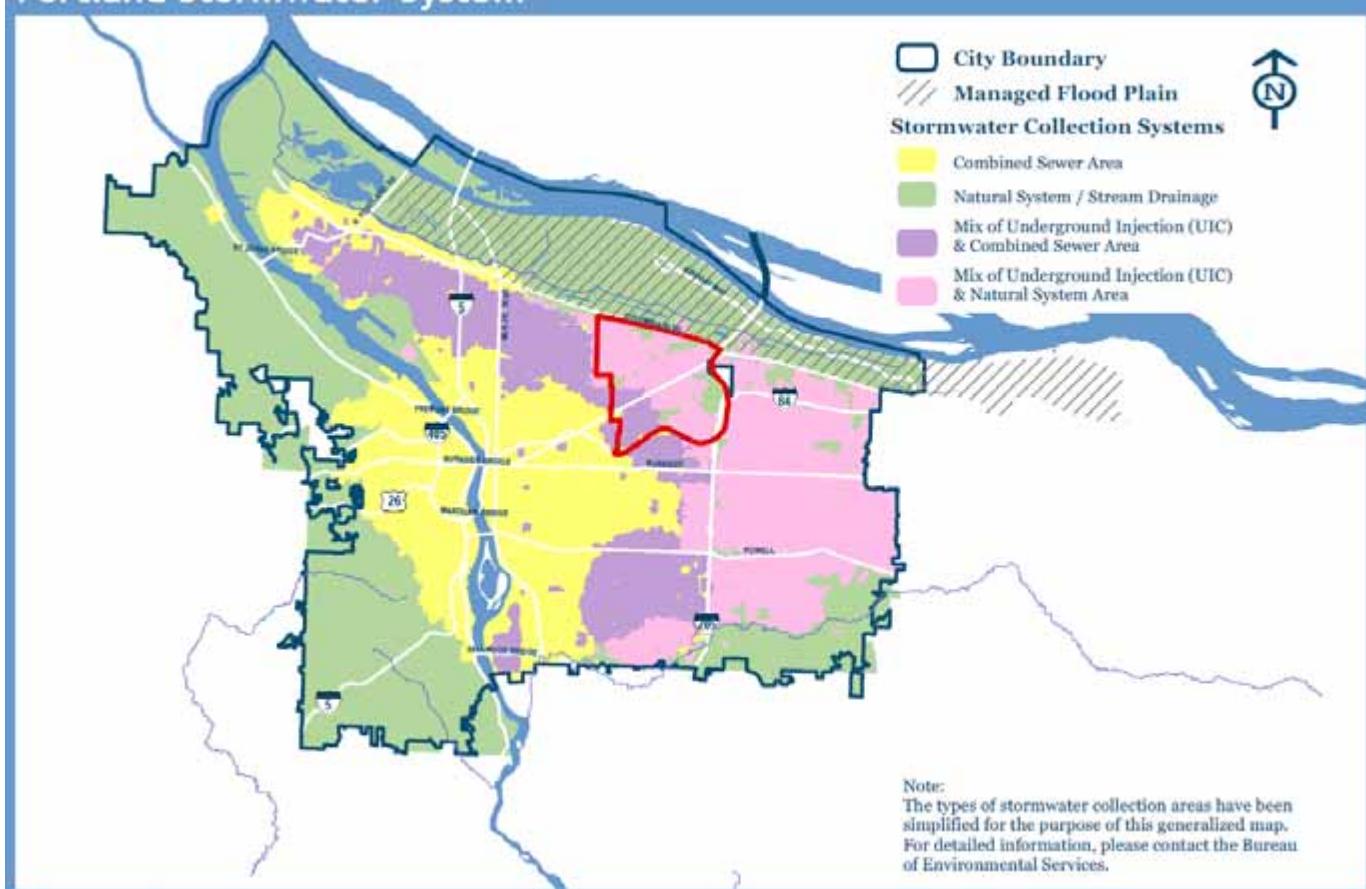


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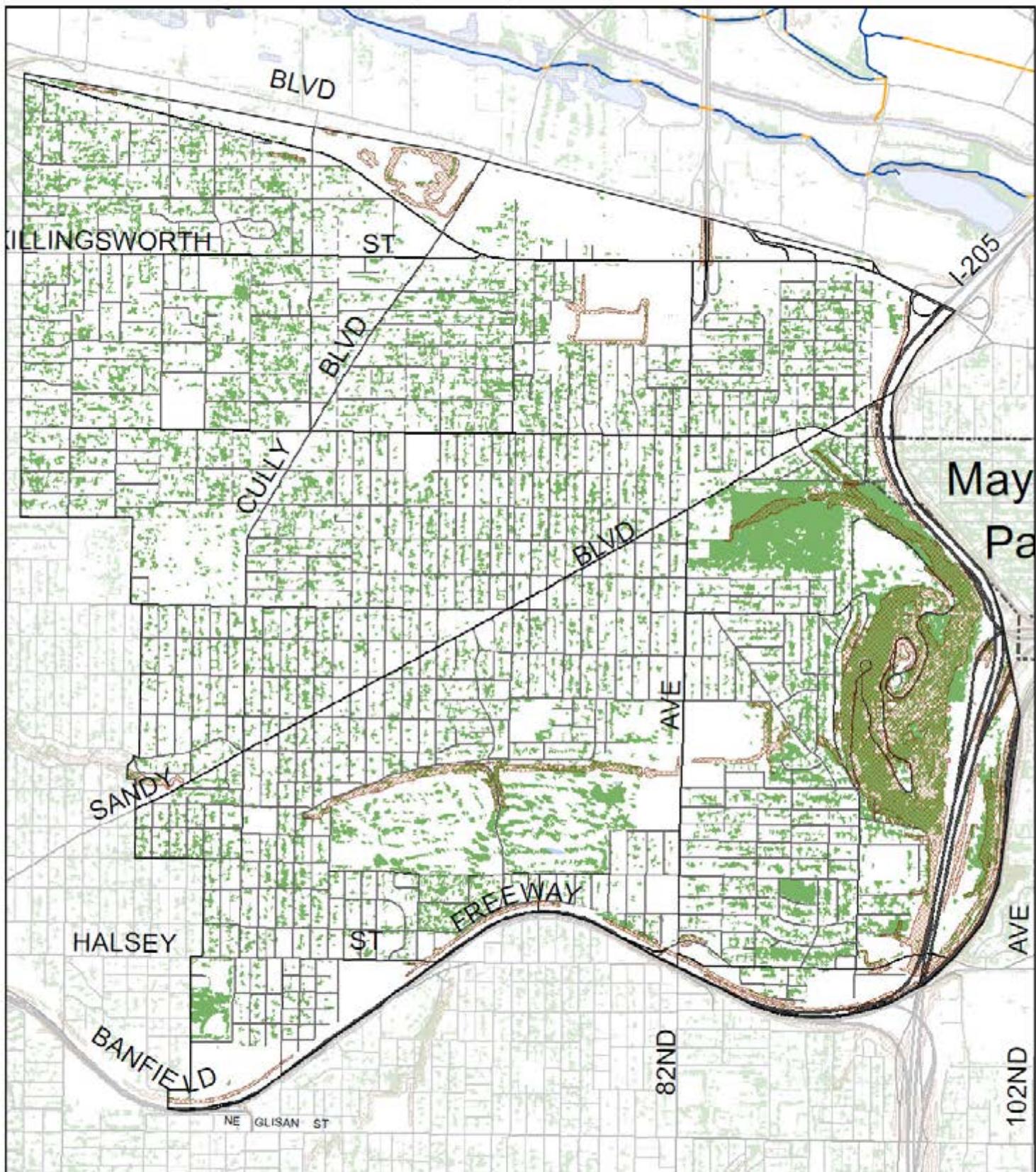
## Portland Watersheds



## Portland Stormwater System



# Roseway-Cully Analysis Area



## Watersheds and Natural Features

February 1, 2012

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



# Roseway-Cully Analysis Area Demographics (2000 – 2010)

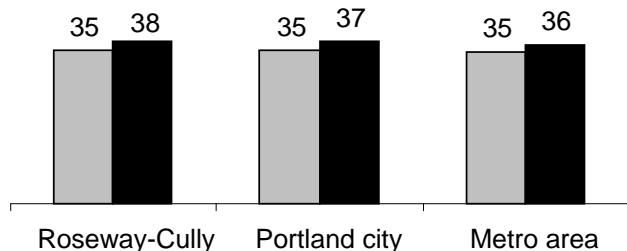
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

	Roseway-Cully	Portland city	Metro area
2010	34,273	583,776	2,226,009
2000	33,311	529,121	1,927,881
% change	2%	10%	15%

■ 2000 ■ 2010

## Median Age

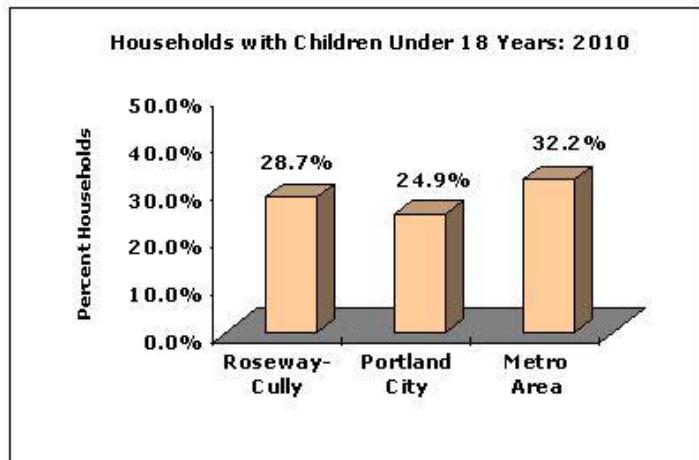
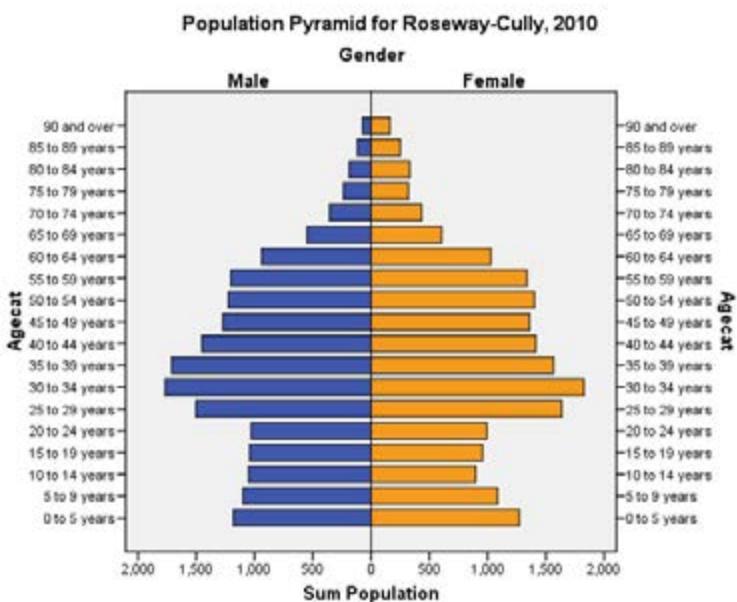
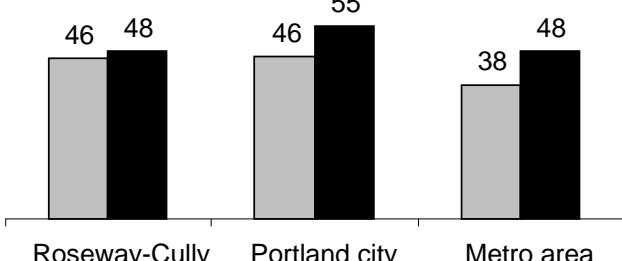


## Average Household Size

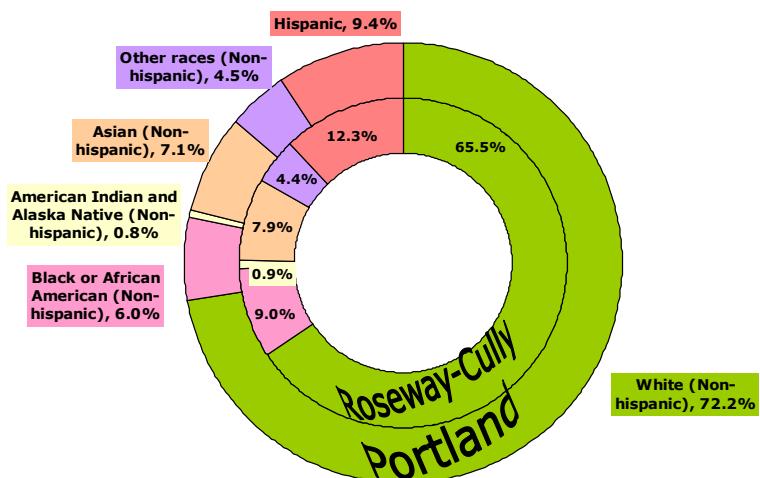


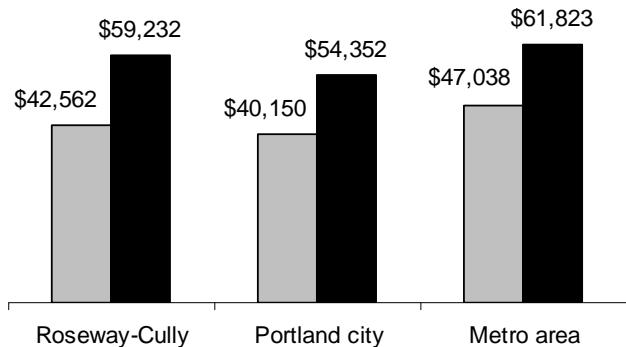
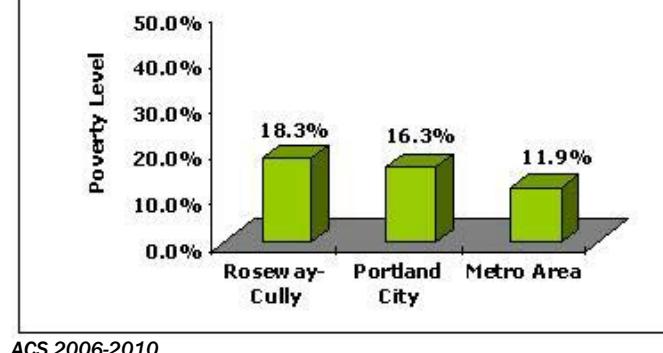
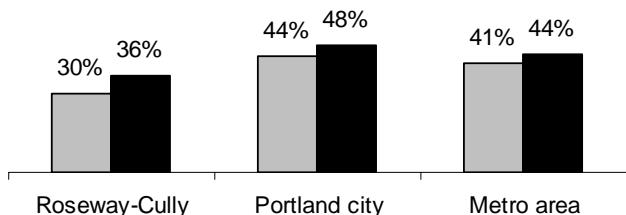
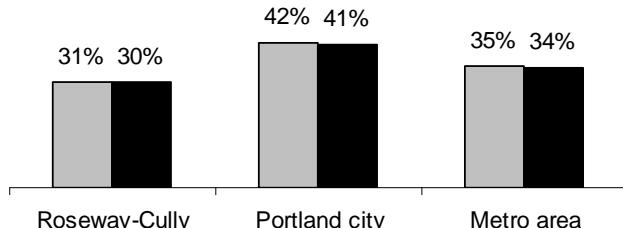
## Diversity Index

(Measures the likelihood that two persons, chosen at random from t



## Racial and Ethnic Distribution in Portland vs. Roseway-Cully



**Median Household Income****Percent Below Poverty: 2010****Percent College Graduates****Percent Renters of Occupied Units****Median Home Value**

	Roseway-Cully	Portland city	Metro area
2010	\$223,725	\$253,184	\$273,500
2000	\$139,966	\$154,721	\$168,347
% change	59.8%	63.6%	62.5%

# Roseway-Cully Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

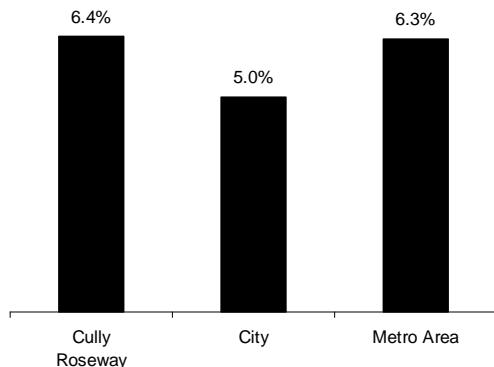
Roseway -Cully	City	Metro Area
1,241,745	51,937,895	107,875,146

### OFFICE SPACE

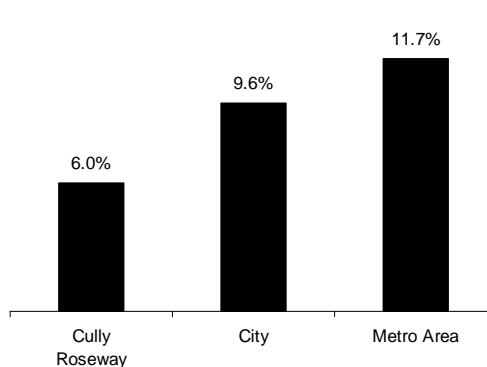
#### Square Feet

Roseway -Cully	City	Metro Area
658,265	54,348,765	92,465,455

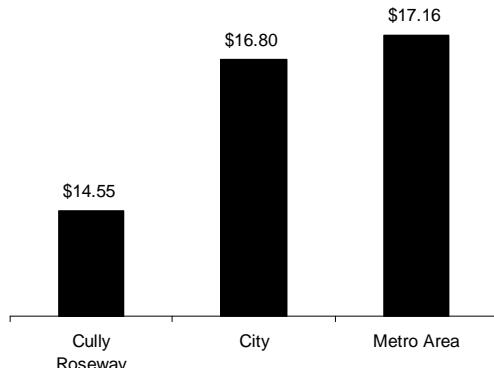
#### Retail Vacancy



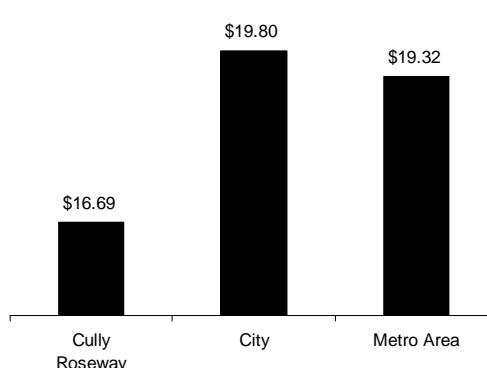
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Roseway-Cully Analysis Area

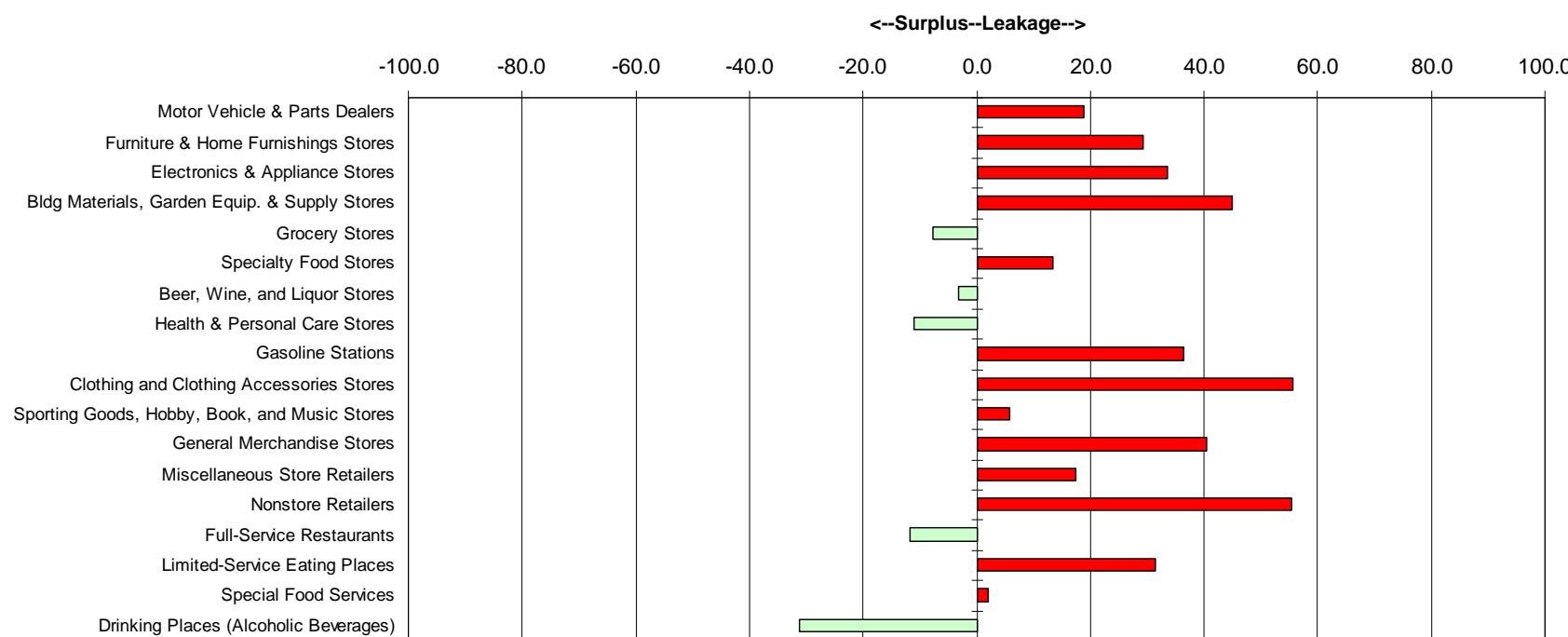
## Retail Market Profile

**Retail Gap = \$94 million**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$340,695,142	\$246,726,593	<b>\$93,968,549</b>	<b>16.0</b>	270
Total Retail Trade (NAICS 44-45)	\$290,449,635	\$198,905,787	<b>\$91,543,848</b>	<b>18.7</b>	181
Total Food & Drink (NAICS 722)	\$50,245,507	\$47,820,806	<b>\$2,424,701</b>	<b>2.5</b>	89

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



## Roseway-Cully Analysis Area

### Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

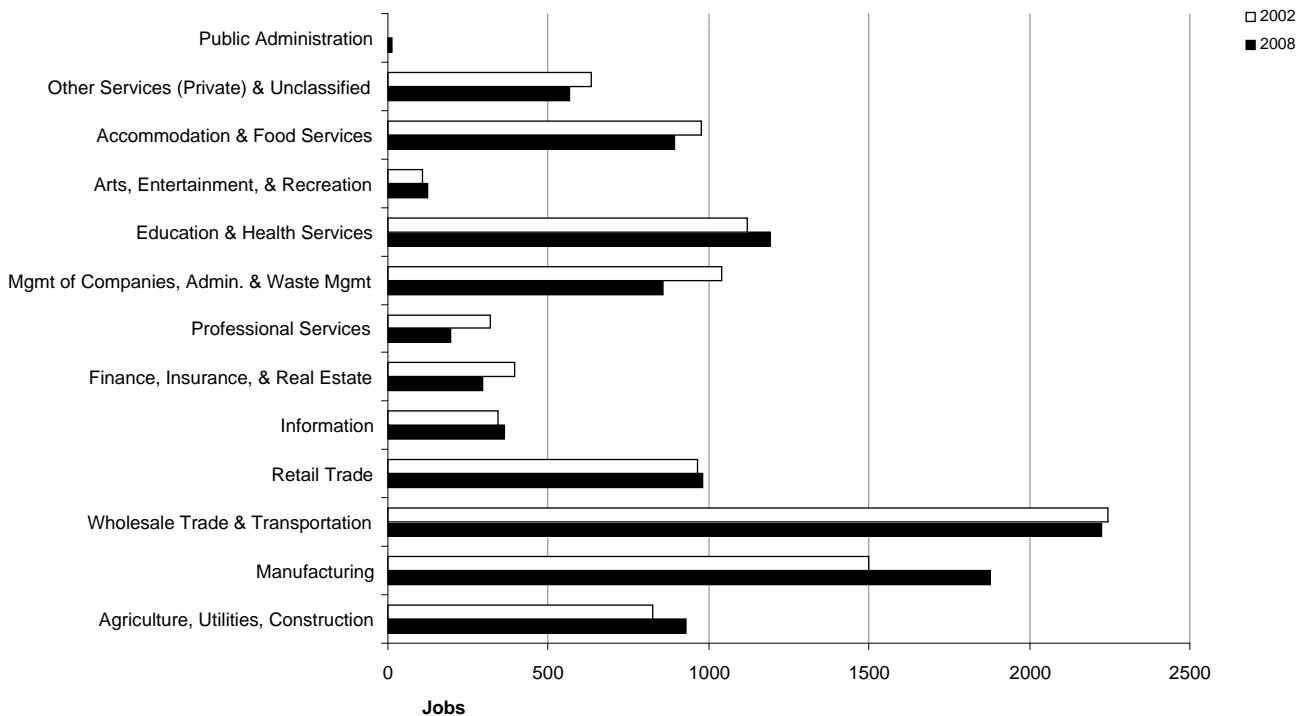
Source: Oregon Employment Department (OED)

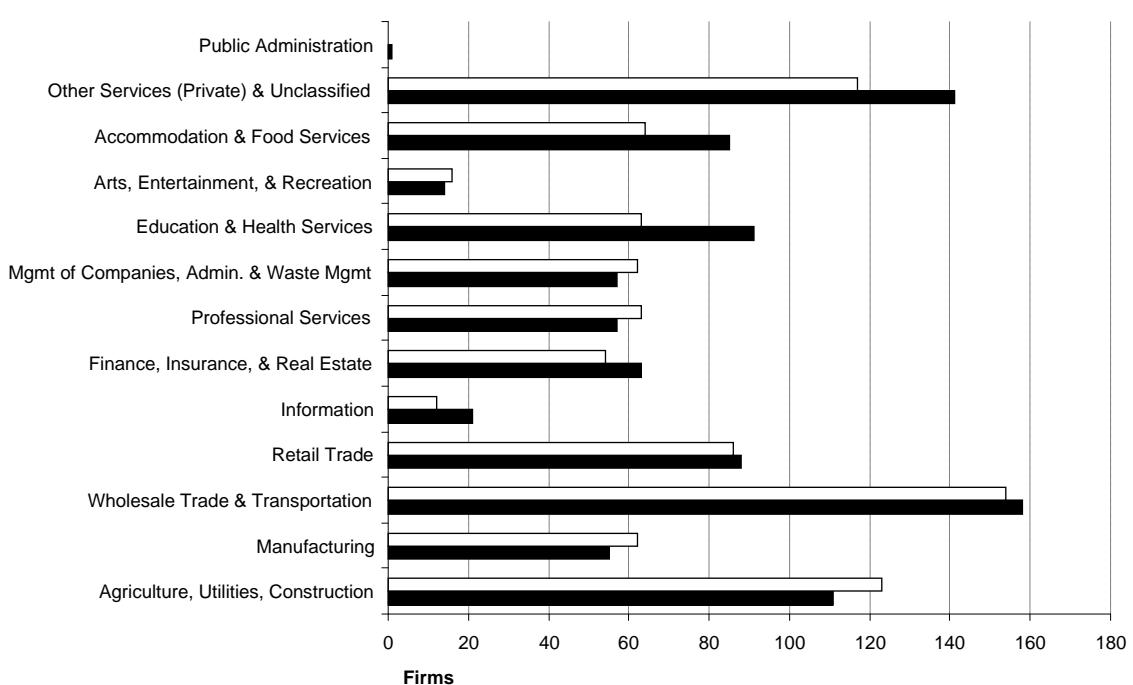
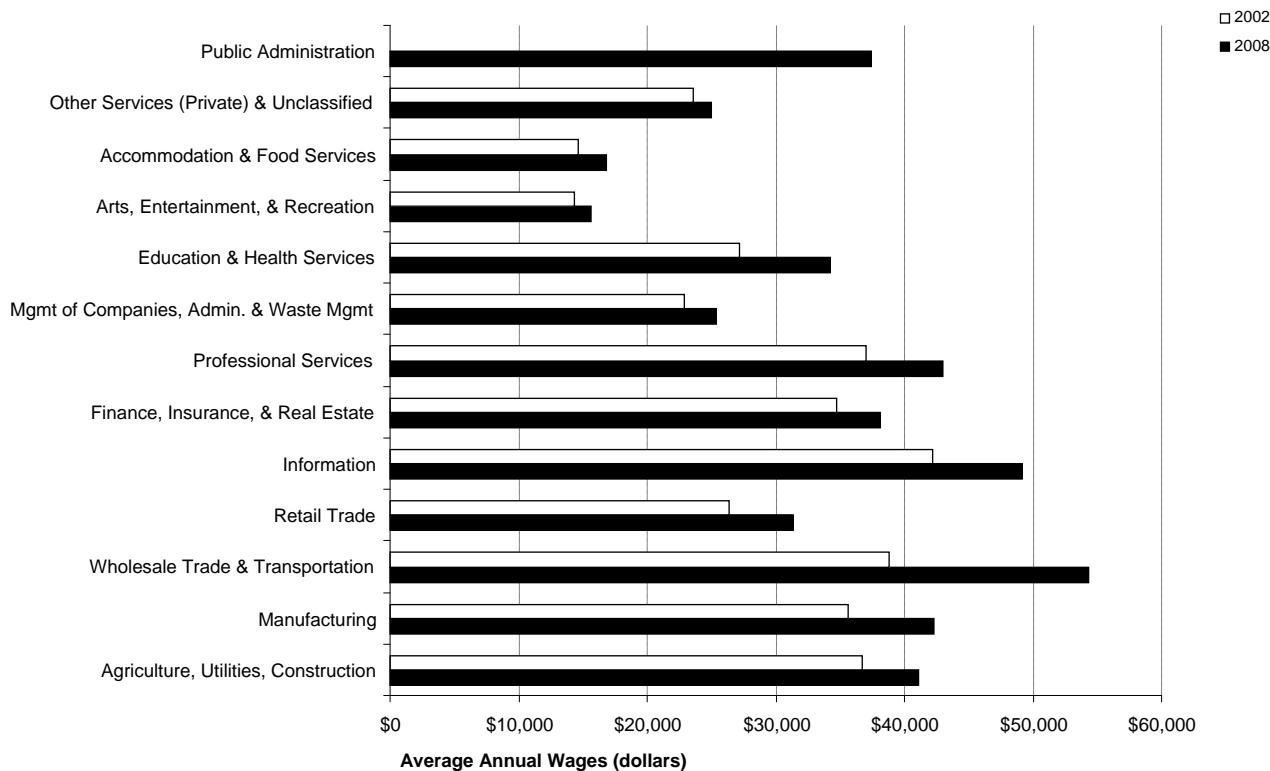
*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	10,467	10,510	+43
Total Firms	876	942	+66
Average Annual Wages	\$30,686	\$38,131	+\$7,445

#### Total Jobs



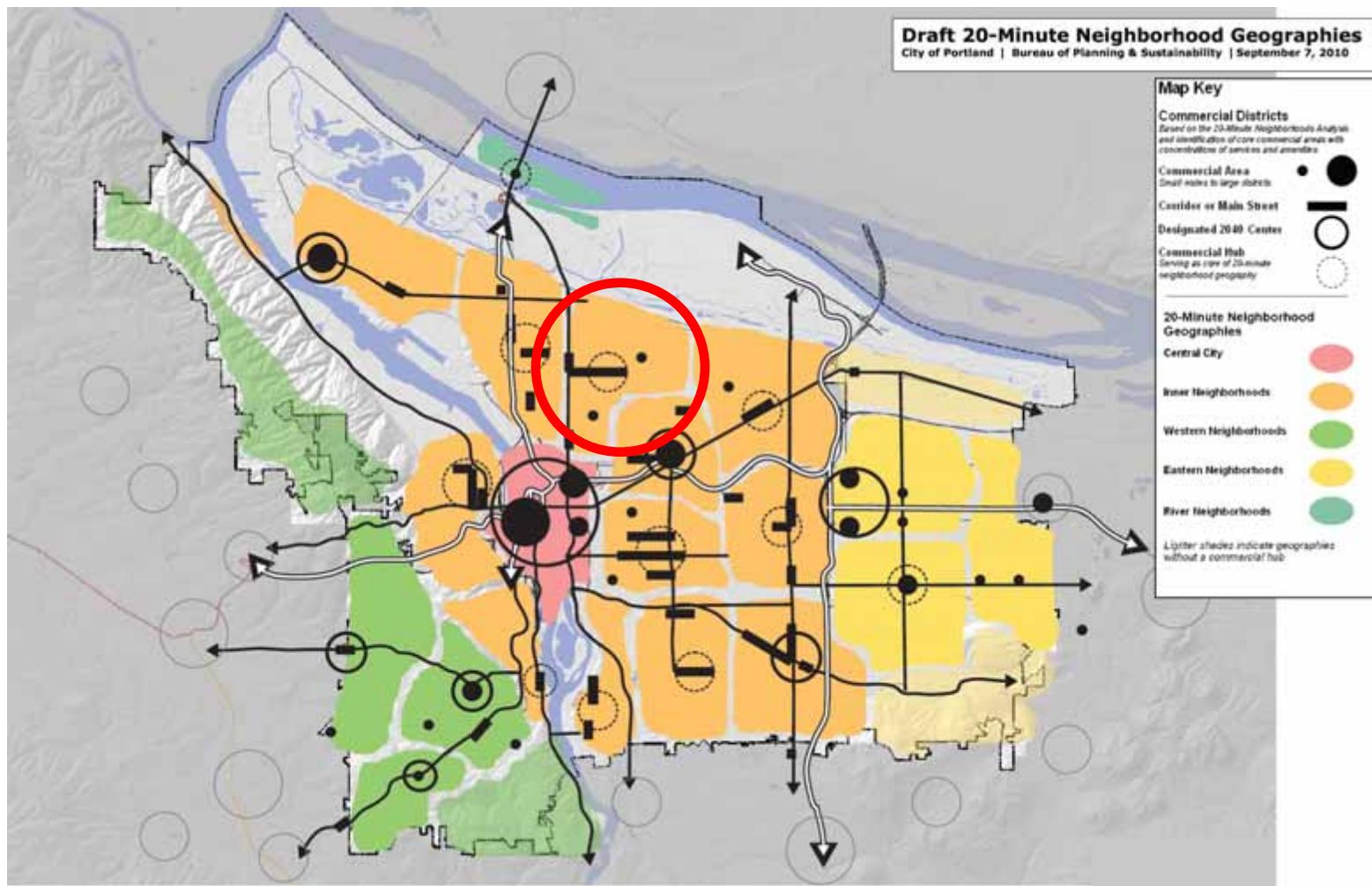
**Total Firms****Average Annual Wages**



## MLK-Alberta Analysis Area

*Including King, Vernon, Woodlawn, Concordia, Sabin, and parts of the Irvington, Eliot, Alameda, and Beaumont-Wilshire neighborhoods*

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# MLK-Alberta Analysis Area

## Services and Amenities

*Population: 33,700 people (13,900 households)  
Land Area: 4.2 square miles (8,000 people per sq. mile)*

### Commercial Districts

The area's primary concentrations of commercial services are located along the Alberta main street and along Martin Luther King, Jr. Boulevard. Smaller groupings of commercial services include nodes on NE Killingsworth at 28<sup>th</sup> and 33<sup>rd</sup> avenues, at the Dekum Triangle in the Woodlawn neighborhood, at NE 15<sup>th</sup> & Fremont, and along NE 42<sup>nd</sup> at the area's eastern edge.

**Grocery stores:** 4 (1 store per 3,475 households)

**Retail gap:** \$77 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	98%
Within 1/2 mile of a public elementary school:	49%
Within 3 miles of a full-service community center*:	98%
Within 1/2 mile of a full-service grocery store:	41%
Within 1/4 mile of a frequent service transit stop:	81%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** 1 (Albina Library)

**Parks and Open Spaces:** 139 acres - including Alberta, Irving, Woodlawn, Fernhill, and Wilshire parks.

**Tree Canopy Coverage:** 18%

**Public Schools:** 5 K-8 schools (Faubion, King, Sabin, Vernon, Woodlawn)

**Colleges (campus):** 1 (Concordia University)

**Hospitals:** None

**Farmers Markets:** 2 (King Farmers Market, Cully Collective Market – at eastern edge)

**Transit Centers/Stations:** None

**Walkable Access Score:** 65 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** King, Vernon, Woodlawn, Concordia, Sabin, and parts of Irvington, Eliot, Alameda, and Beaumont-Wilshire

**Business Associations:** Alberta, North-Northeast, and 42<sup>nd</sup> Avenue business associations

## Urban Form Characteristics

Much of this area is composed of a grid of residential blocks, originally developed during the Streetcar Era with a continuous system of sidewalks. Martin Luther King, Jr. Boulevard, the area's most significant street corridor, includes a mix of traditional main street areas with street-fronting buildings and more auto-oriented development with surface parking lots. The Alberta main street serves as the area's east-west commercial spine. The area is bordered to the north by industrial areas and the Columbia Slough.

**Access issues.** Good street and sidewalk connectivity. Good access to transit and relatively good access to commercial and community services.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	6.1 miles (Martin Luther King Jr. Blvd, Alberta, Killingsworth)
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,351	72%	99
Multi-Family Residential:	235	13%	64
Commercial/Mixed-Use:	163	9%	81
Employment:	12	.7%	4
Industrial:	35	2%	0
Open Space:	82	4%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

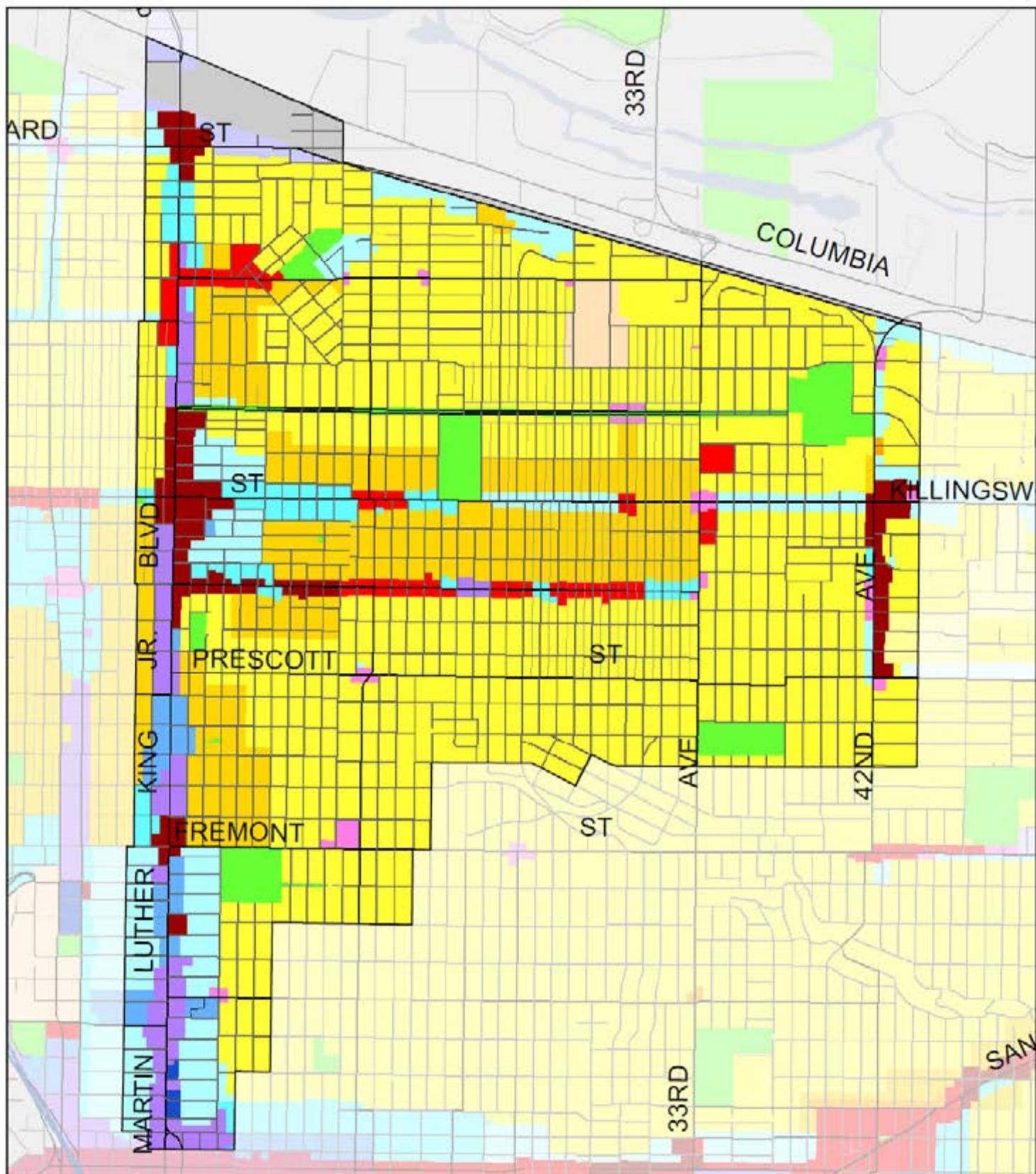
2010 Housing Units (Census):	14,978
2035 Housing Units:	19,600

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# MLK-Alberta Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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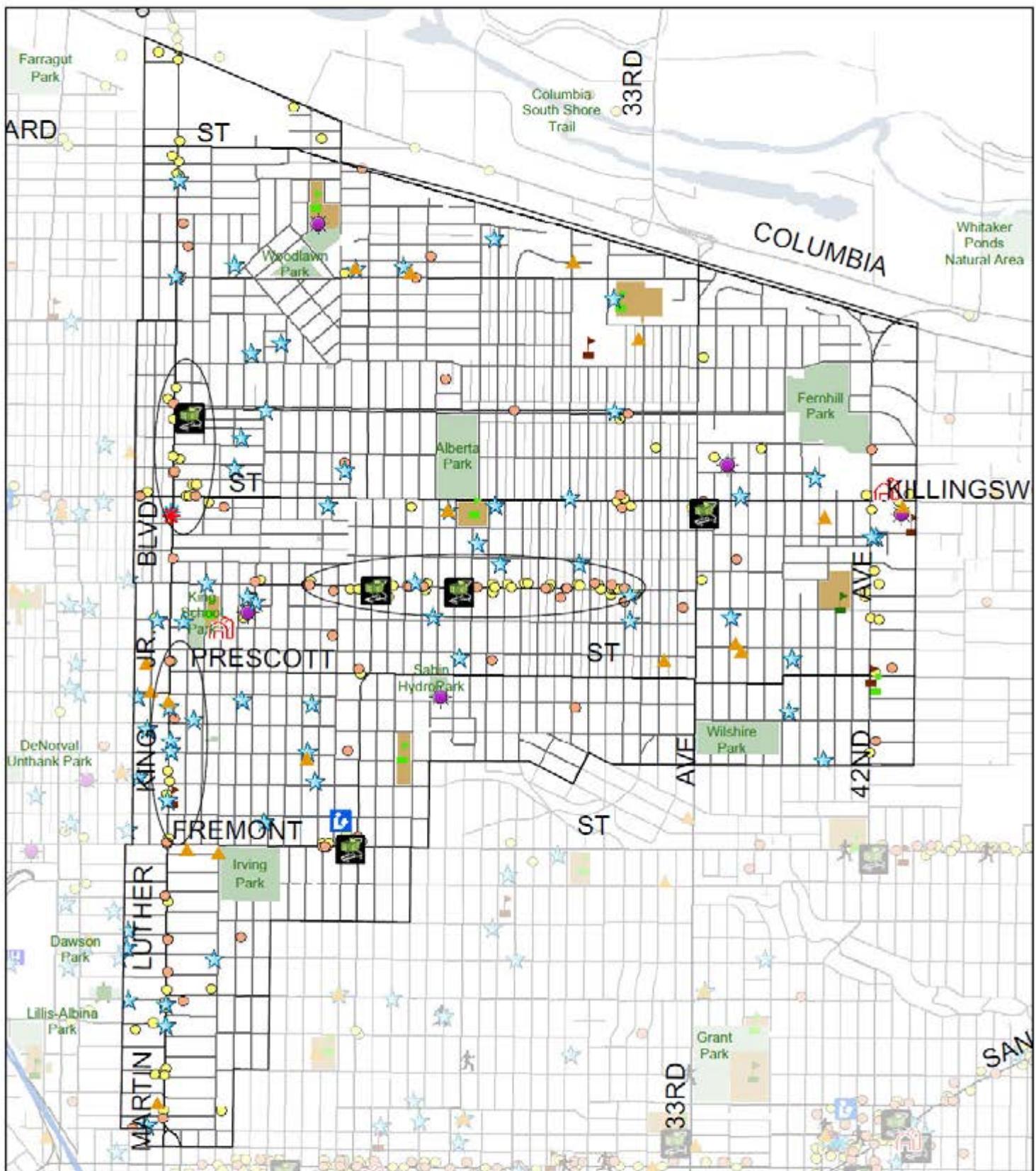


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# MLK-Alberta Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Farmers Markets
- Grocery Stores
- Places of Worship
- ▼ Preschools
- ▲ Daycare Centers
- Public HS
- Public K-8
- Community Centers
- Community Gardens
- County Health Clinic
- County Aging Services



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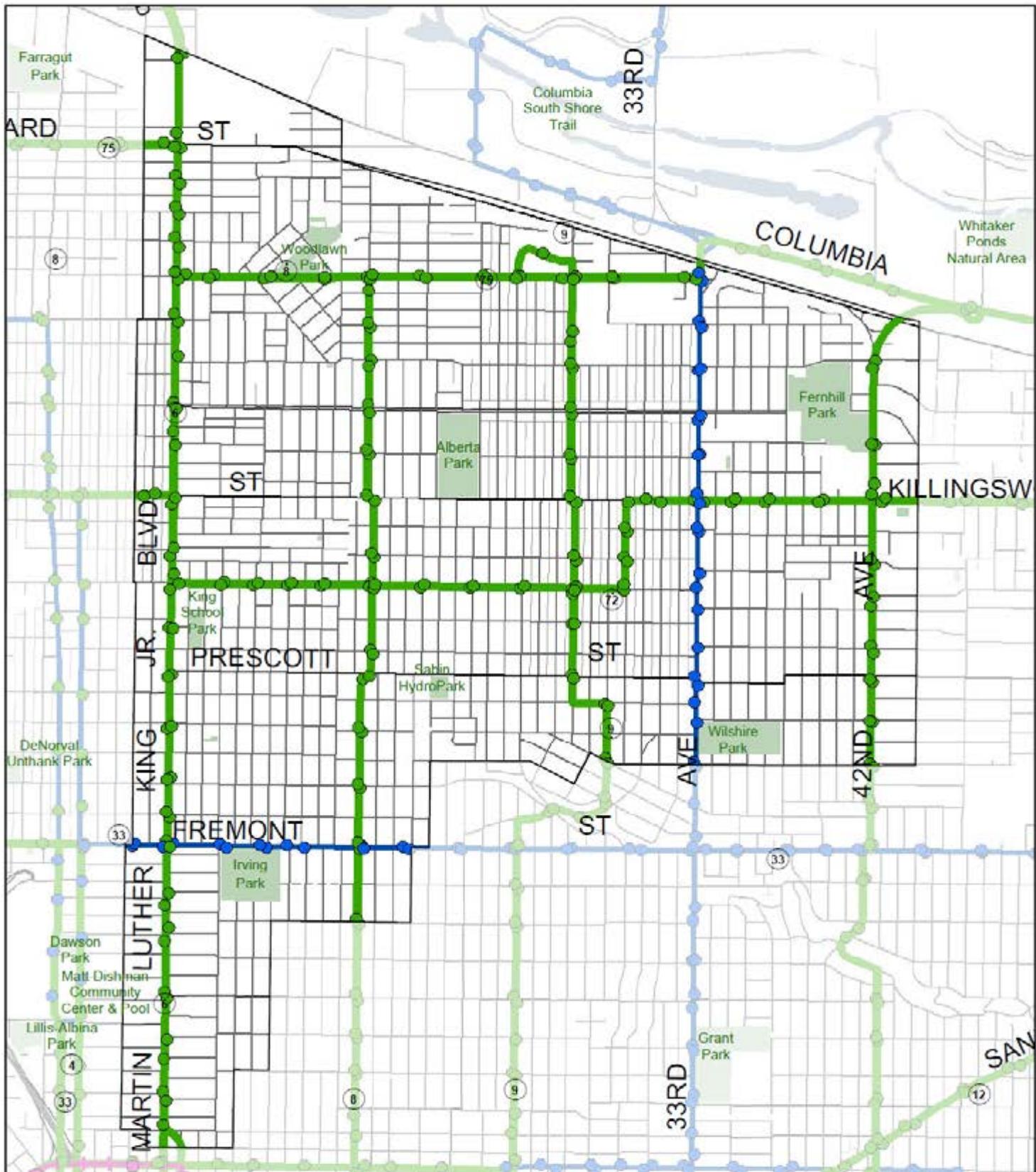


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# MLK-Alberta Analysis Area



## Transit Infrastructure

February 1, 2012

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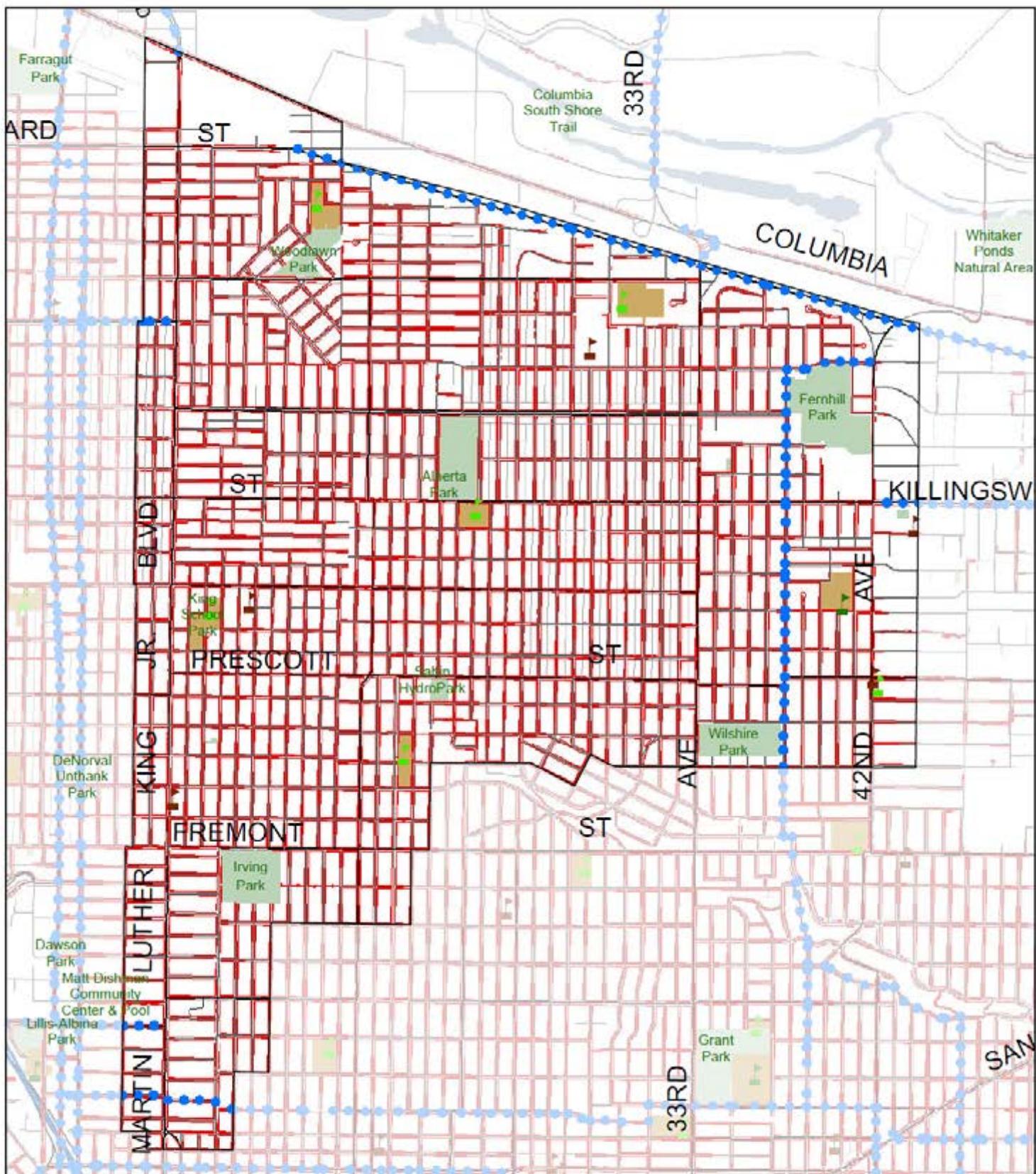


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# MLK-Alberta Analysis Area



## Sidewalks and Bicycle Infrastructure

February 1, 2012

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools

0 1,000 2,000 3,000 Feet

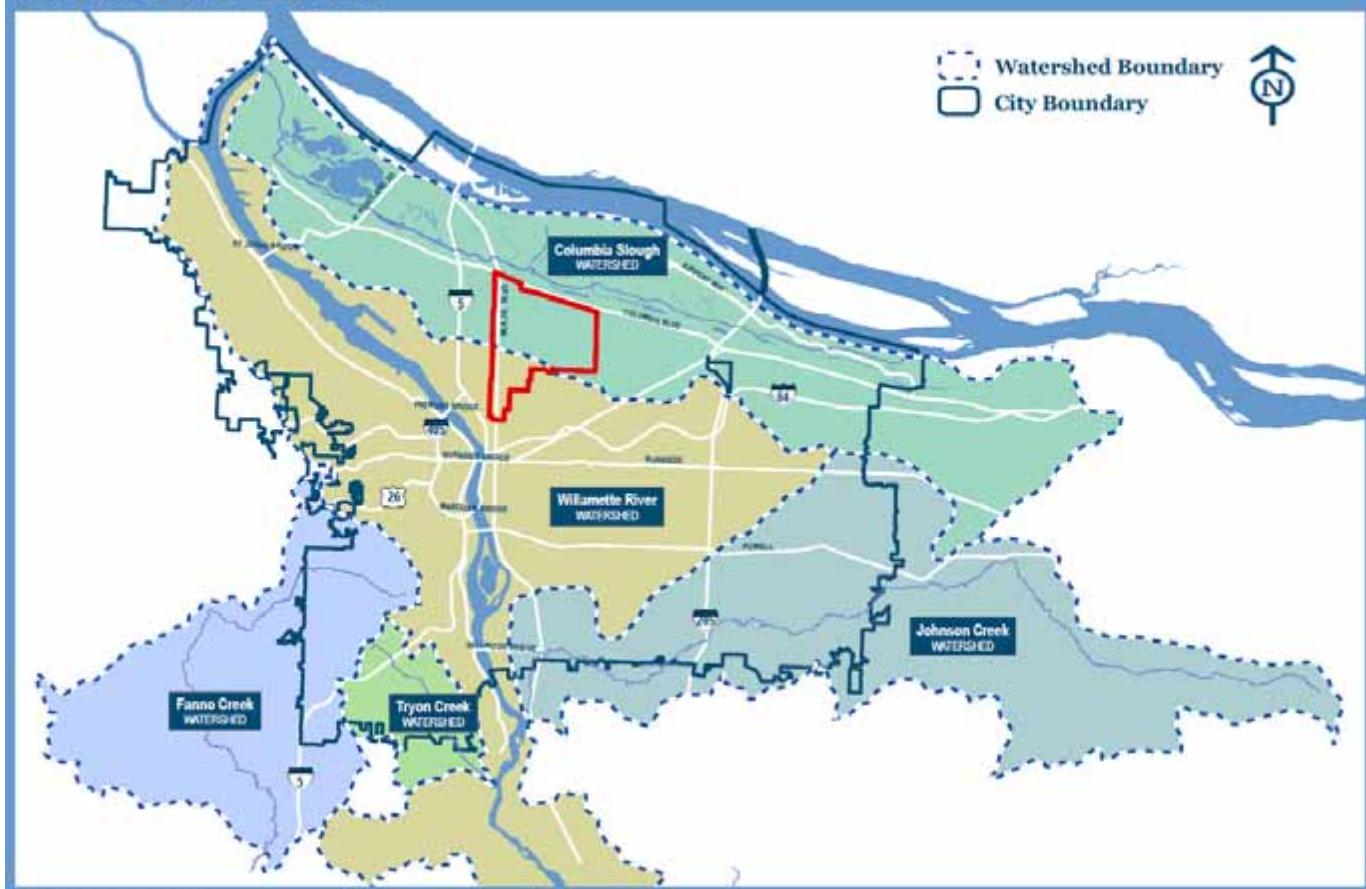


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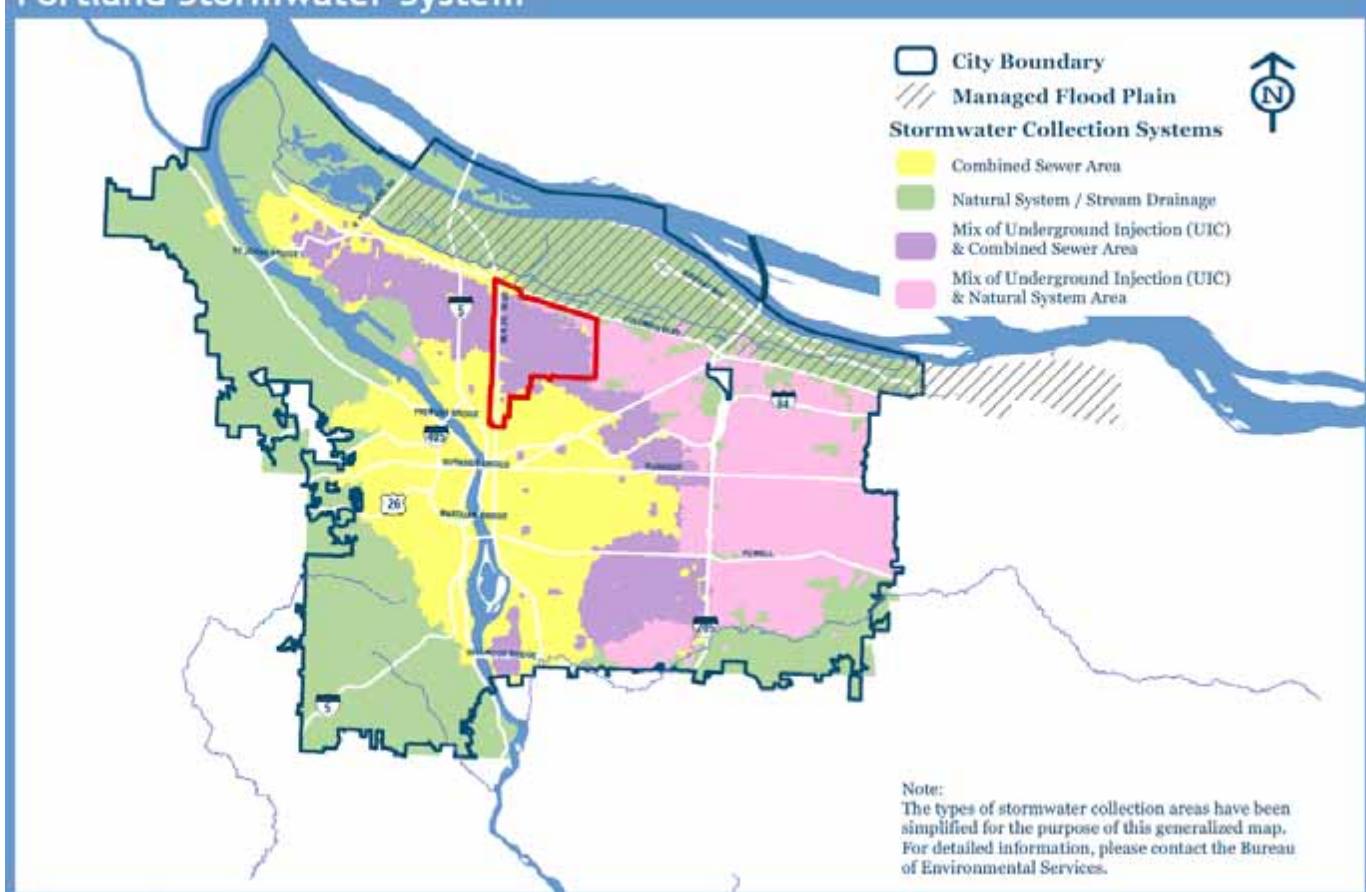


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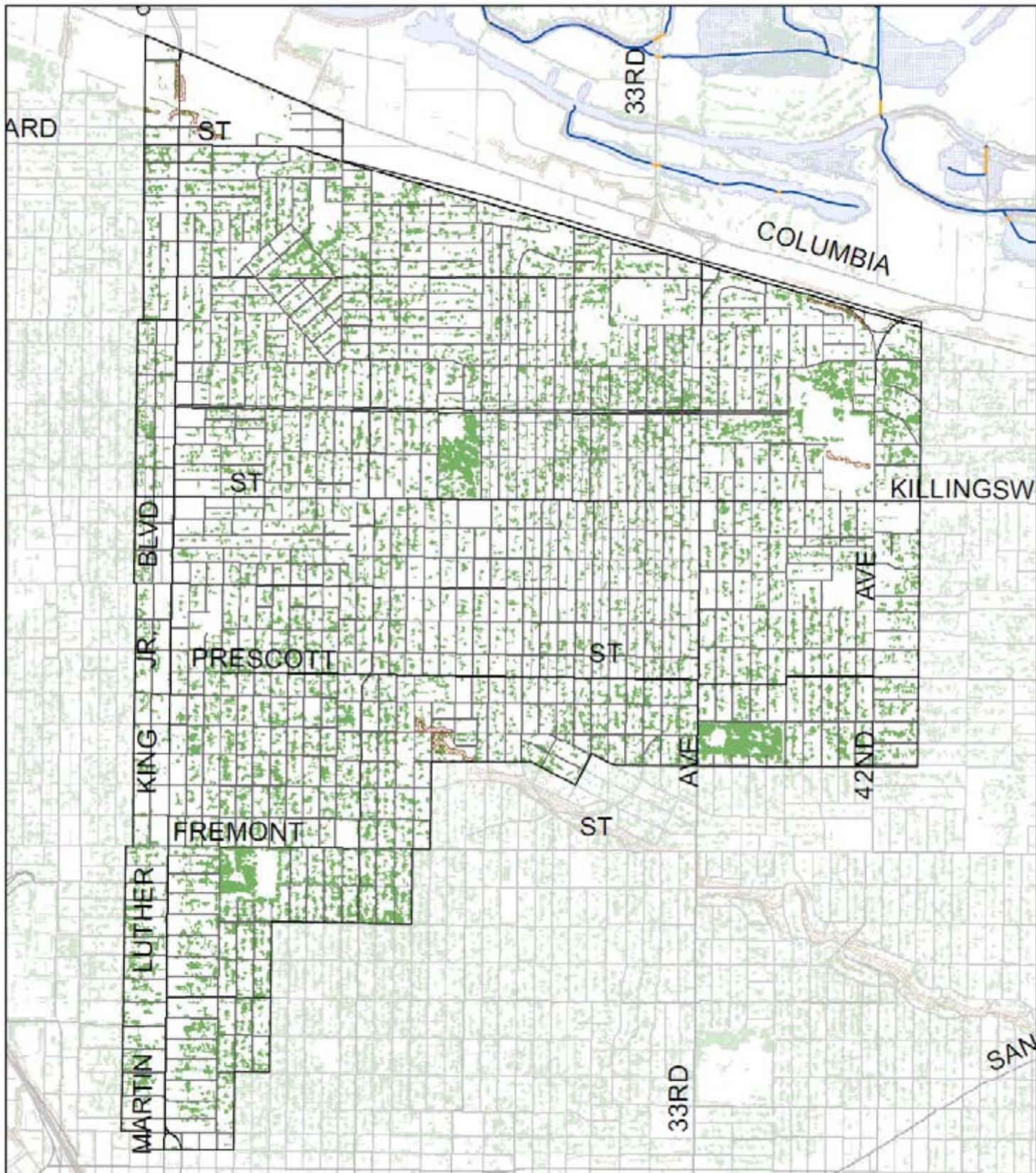
## Portland Watersheds



## Portland Stormwater System



# MLK-Alberta Analysis Area

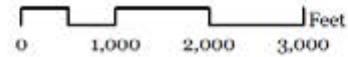


## Watersheds and Natural Features

February 1, 2012

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



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# MLK-Alberta Analysis Area

## Demographics (2000 – 2010)

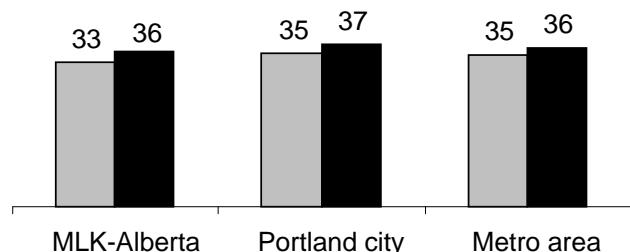
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

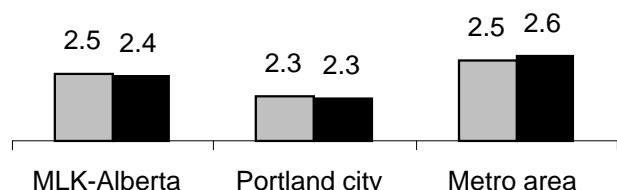
	MLK-Alberta	Portland city	Metro area
2010	33,696	583,776	2,226,009
2000	33,241	529,121	1,927,881
% change	1%	10%	15%

■ 2000 ■ 2010

### Median Age

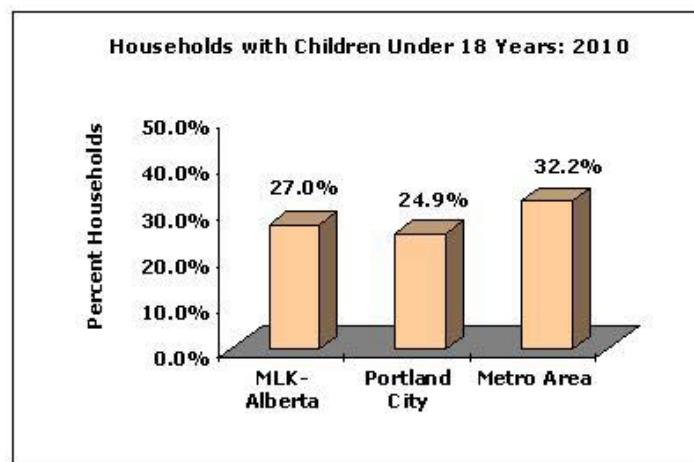
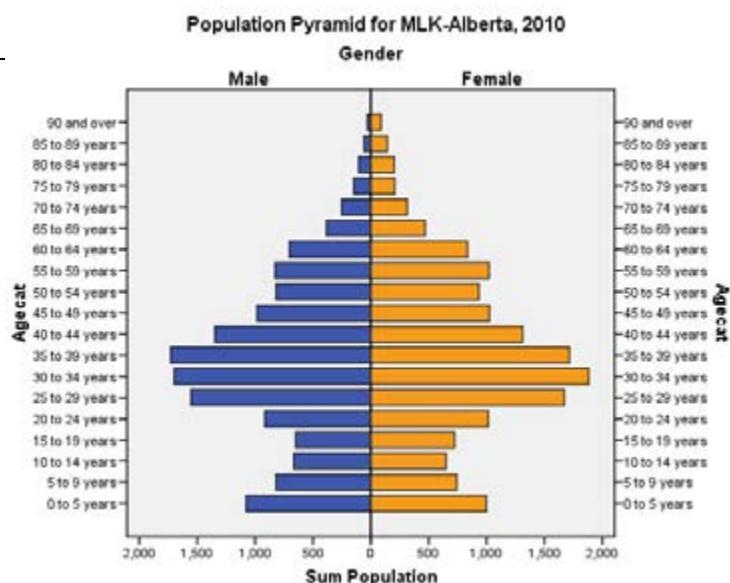
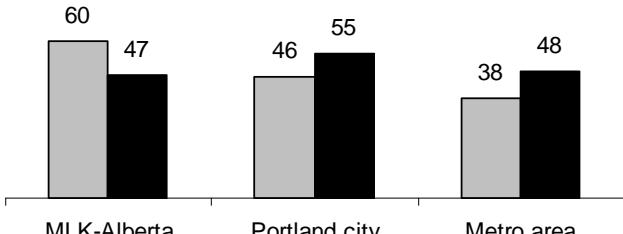


### Average Household Size

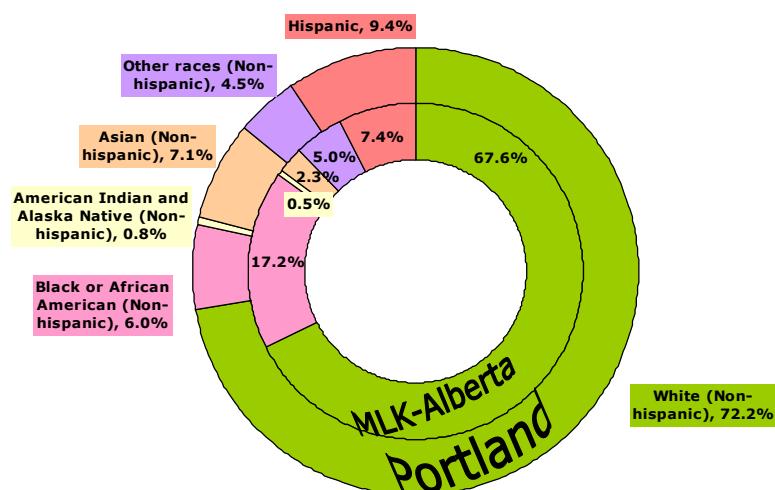


### Diversity Index

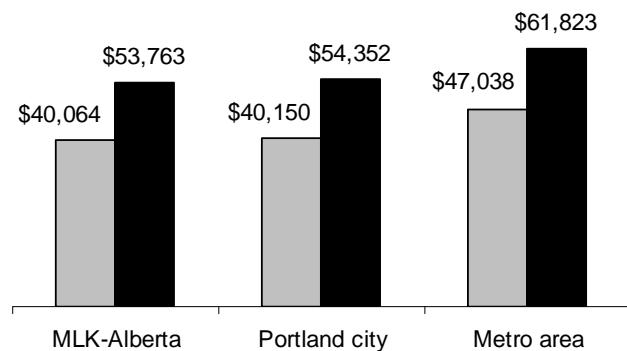
(Measures the likelihood that two persons, chosen at random from



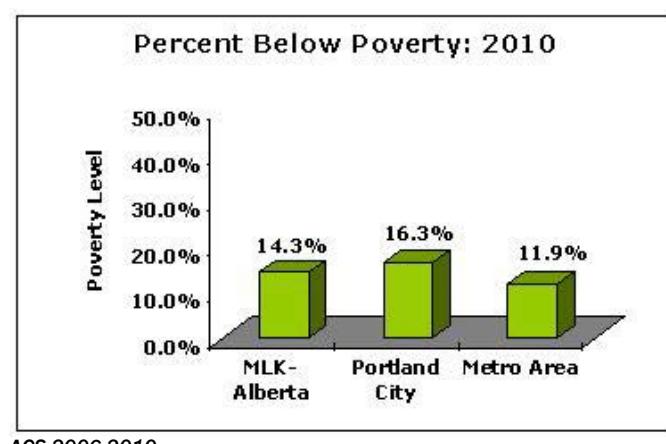
### Racial and Ethnic Distribution in Portland vs. MLK-Alberta



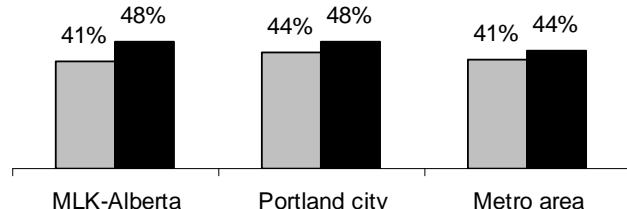
## Median Household Income



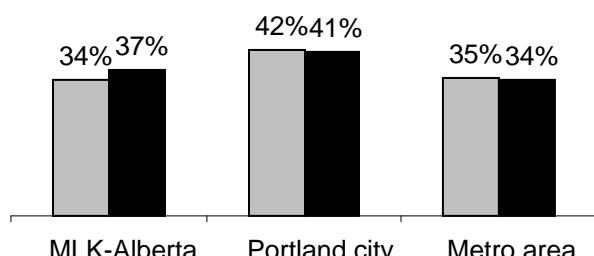
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	MLK-Alberta	Portland city	Metro area
2010	\$236,154	\$253,184	\$273,500
2000	\$147,306	\$154,721	\$168,347
% change	60.3%	63.6%	62.5%

# MLK-Alberta Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

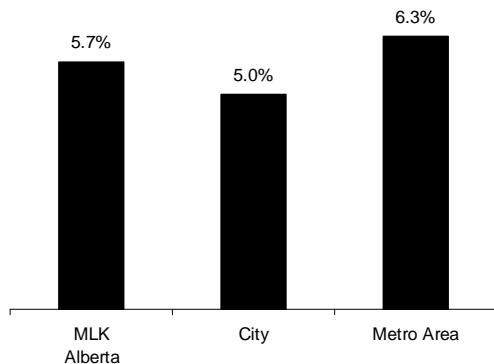
MLK Alberta	City	Metro Area
1,800,210	51,937,895	107,875,146

### OFFICE SPACE

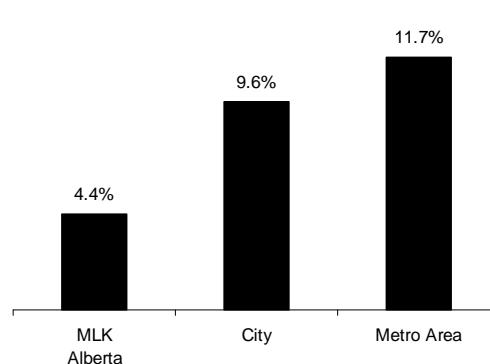
#### Square Feet

MLK Alberta	City	Metro Area
577,776	54,348,765	92,465,455

#### Retail Vacancy



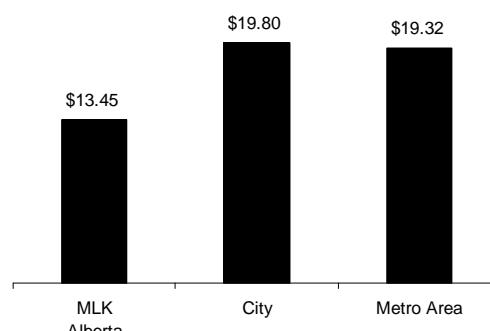
#### Office Vacancy



#### Retail Rents



#### Office Rents



# MLK-Alberta Analysis Area

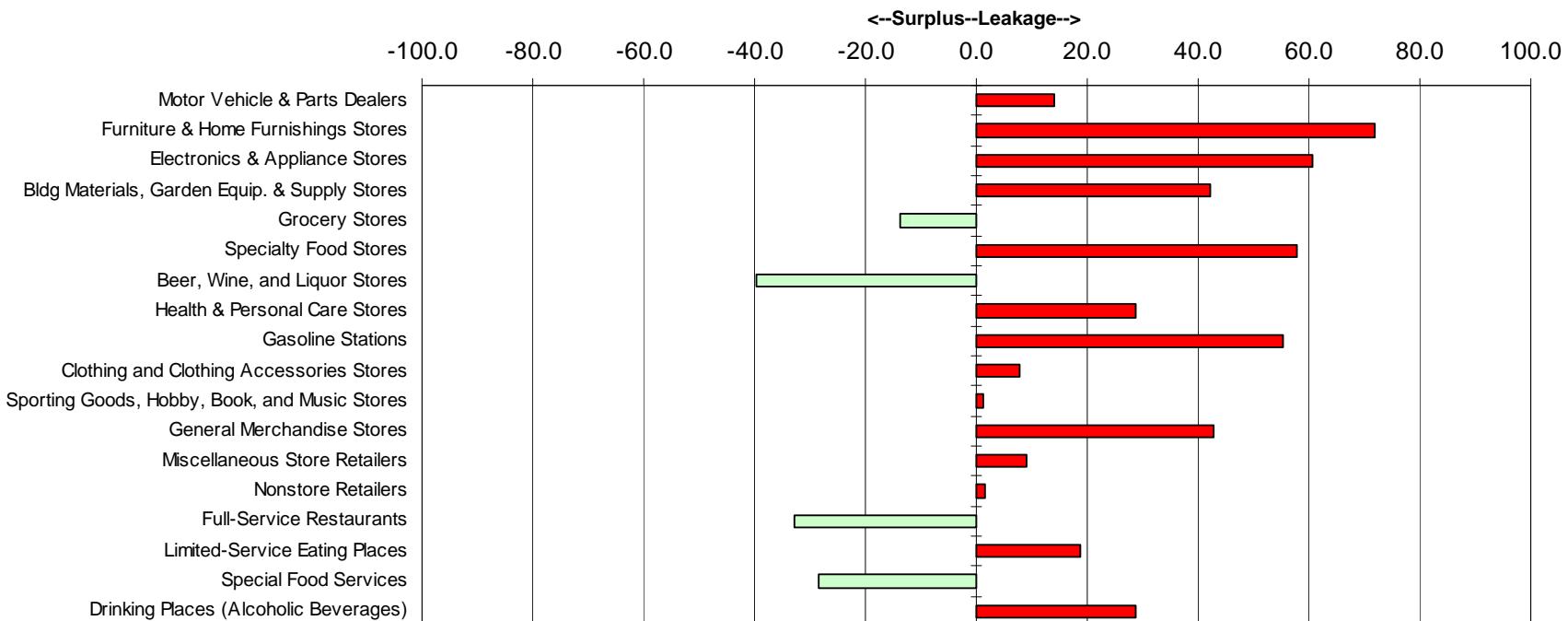
## Retail Market Profile

**Retail Gap = \$77 million**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$372,488,652	\$295,445,625	\$77,043,027	11.5	313
Total Retail Trade (NAICS 44-45)	\$317,452,877	\$228,673,868	\$88,779,009	16.3	198
Total Food & Drink (NAICS 722)	\$55,035,775	\$66,771,757	-\$11,735,982	-9.6	115

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# MLK-Alberta Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

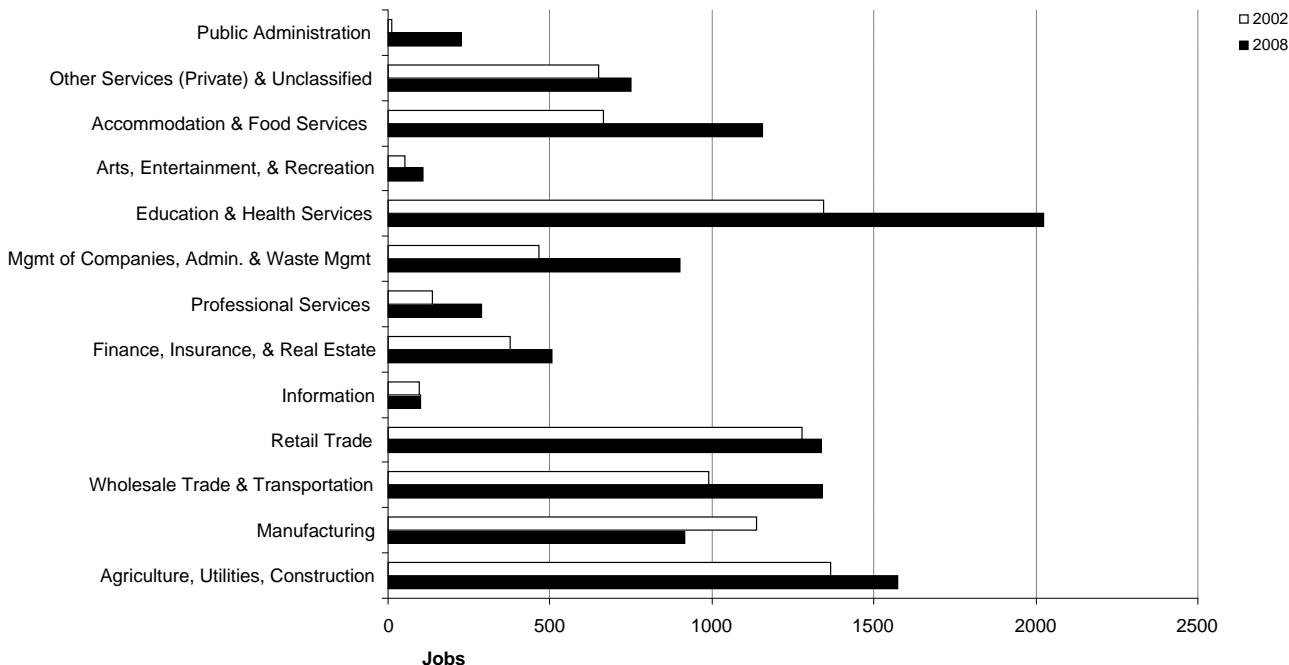
Source: Oregon Employment Department (OED)

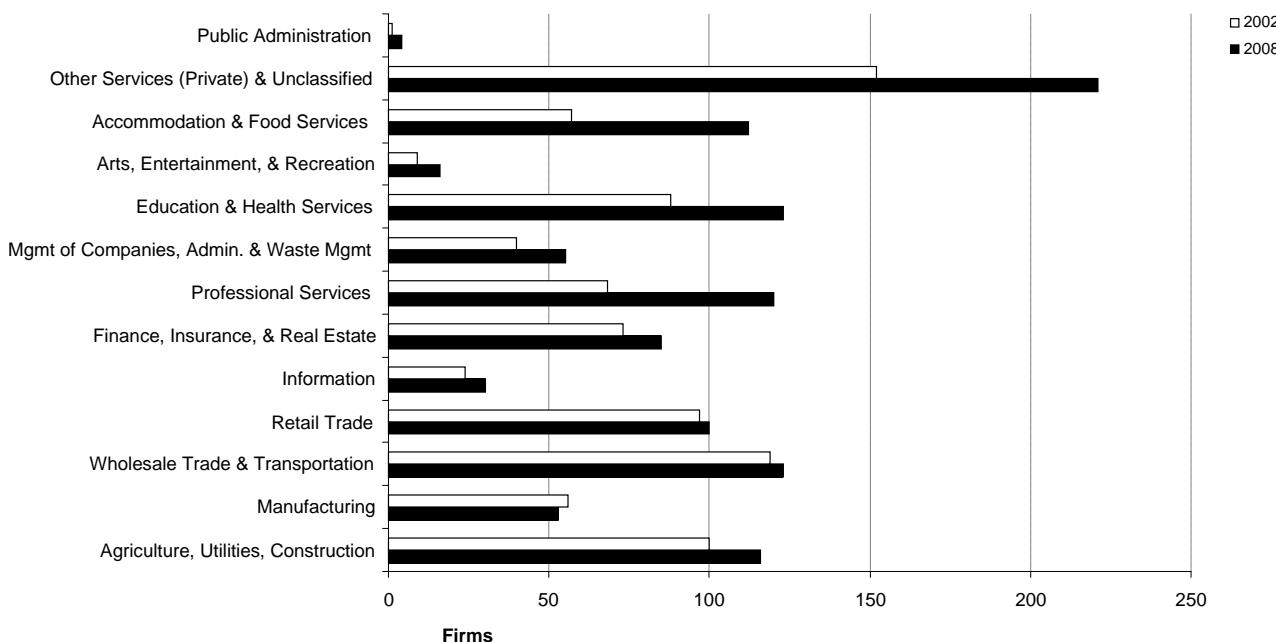
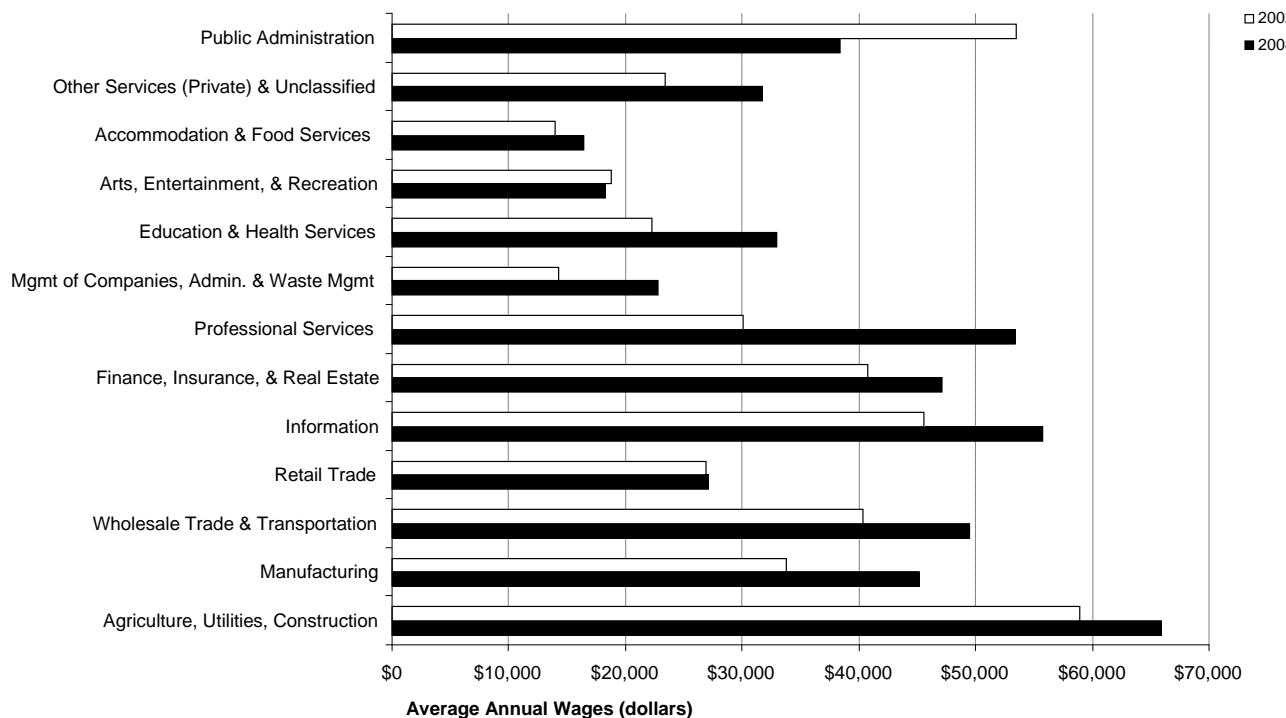
*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	8,563	11,219	+2,656
Total Firms	884	1,158	+274
Average Annual Wages	\$32,662	\$38,569	+\$5,907

**Total Jobs**



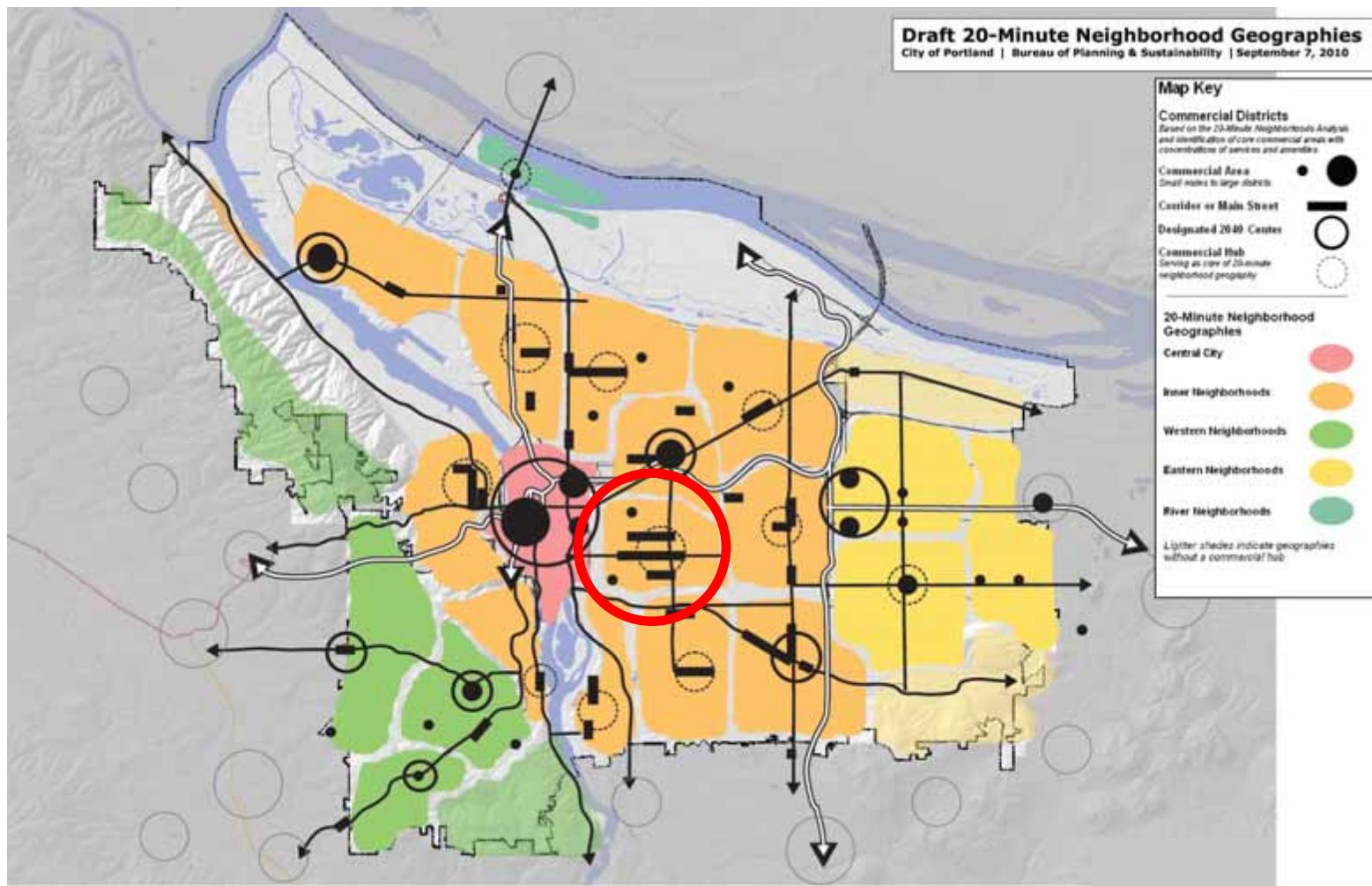
**Total Firms****Average Annual Wages**



## Belmont-Hawthorne-Division Analysis Area

*Including Buckman, Hosford-Abernethy, Sunnyside, Richmond, and parts of the Kerns, Laurelhurst, and Mt. Tabor neighborhoods*

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# Belmont-Hawthorne-Division Analysis Area

## Services and Amenities

*Population: 36,900 people (17,700 households)  
Land Area: 3.7 square miles (10,100 people per sq. mile)*

### Commercial Districts

Characteristic of commercial districts in this area are its “main streets”, originally developed during the Streetcar Era of the late 19<sup>th</sup> and early 20<sup>th</sup> centuries. The primary main street corridors are along Belmont, Hawthorne, and Division, with secondary commercial areas along Burnside and on 28<sup>th</sup> Avenue near Burnside. Smaller commercial nodes are scattered elsewhere in the district. Among these are nodes at SE Clinton and 26<sup>th</sup> Avenue and on SE Stark near 28<sup>th</sup> Avenue.

**Grocery stores:** 6 (1 store per 2,950 households)

**Retail gap:** \$52 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	100%
Within 1/2 mile of a public elementary school:	53%
Within 3 miles of a full-service community center*:	68%
Within 1/2 mile of a full-service grocery store:	59%
Within 1/4 mile of a frequent service transit stop:	87%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** 1 (Belmont Library)

**Parks and Open Spaces:** 95 acres - including Laurelhurst, Colonel Summers, Sewellcrest and Clinton parks.

**Tree Canopy Coverage:** 23%

**Public Schools:** 2 high schools (Cleveland\*, Franklin)

9 K-8 schools (Abernethy Elementary, Atkinson Elementary\*, Buckman Arts Elementary, Da Vinci Arts Middle School, Glencoe Elementary\*, Hosford Middle School, Mt. Tabor Middle School\*, Richmond Elementary, Sunnyside Environmental K-8)

\*At edge of analysis area

**Colleges (campus):** 2 specialized (Multnomah Bible College & Seminary, Western Seminary)

**Hospitals:** None

**Farmers Markets:** 2 (Buckman Farmers Market, People's Farmers Market)

**Transit Centers/Stations:** None

**Walkable Access Score:** 79 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

## Neighborhood and Business Associations

**Neighborhood Associations:** Buckman, Hosford-Abernethy, Sunnyside, Richmond, and parts of Kerns, Laurelhurst, and Mt. Tabor

**Business Associations:** Belmont Area, Hawthorne Boulevard, Division/Clinton, and East Burnside business associations

## Urban Form Characteristics

Much of this area is composed of a compact grid of residential blocks, originally developed during the Streetcar Era with a continuous system of sidewalks. The area includes an extensive series of main street business districts, lined by storefront commercial buildings. The most prominent topographical feature is Mt. Tabor, located at the eastern edge of the area.

**Access issues.** Good street and sidewalk connectivity. Good access to commercial and community services, and the area has among the best access to frequent service transit (bus) in the region.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	8.2 miles (Burnside, Belmont, Hawthorne, Division, 50 <sup>th</sup> Ave.)
Station Communities:	1 planned (at Clinton/SE 12 <sup>th</sup> along Portland-Milwaukie light rail line)

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,182	73%	133
Multi-Family Residential:	177	11%	68
Commercial/Mixed-Use:	164	10%	62
Employment:	12	.7%	.4
Industrial:	0	0%	0
Open Space:	87	5%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

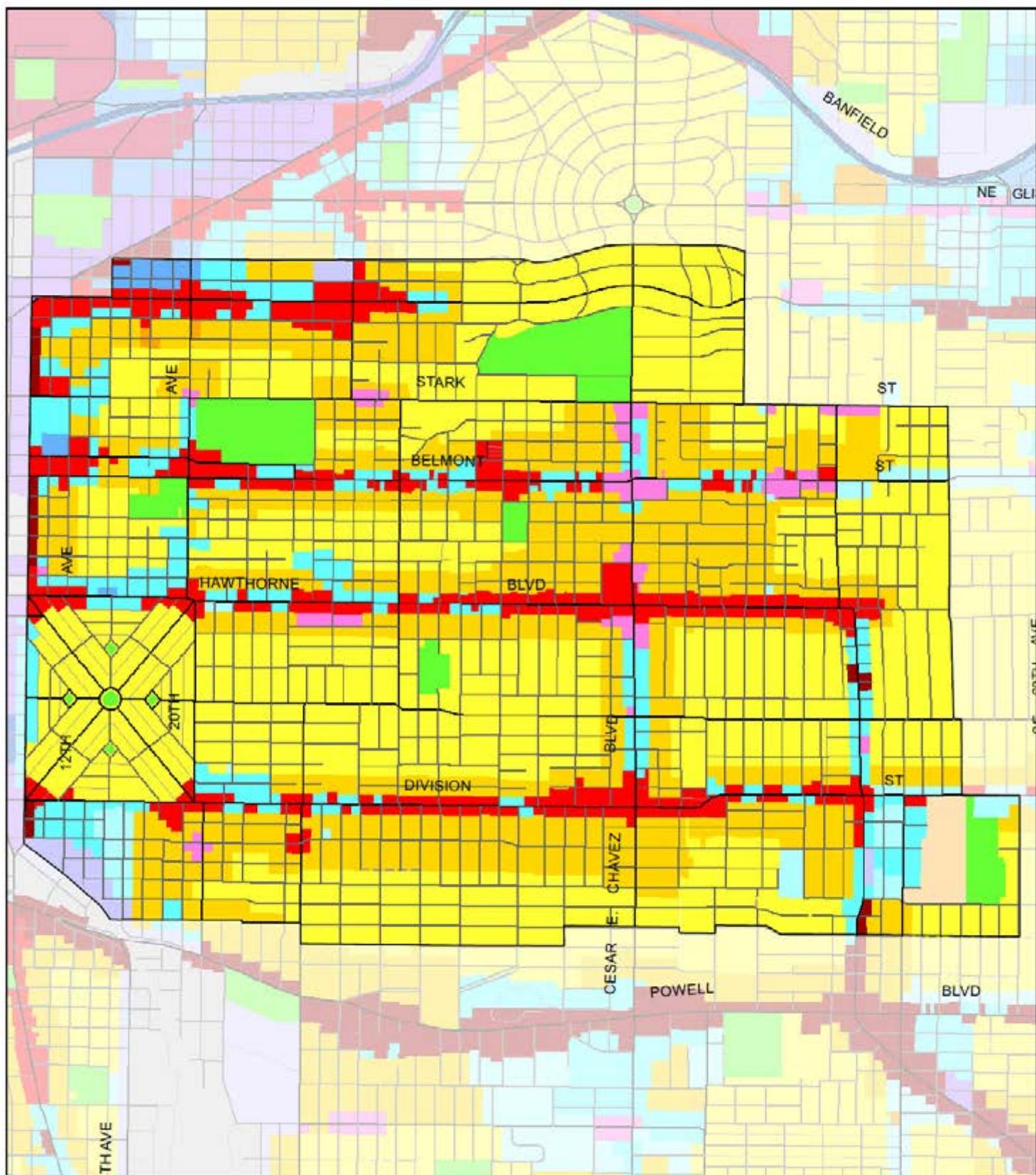
2010 Housing Units (Census):	18,582
2035 Housing Units:	22,700

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Belmont-Hawthorne-Division Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000 Feet

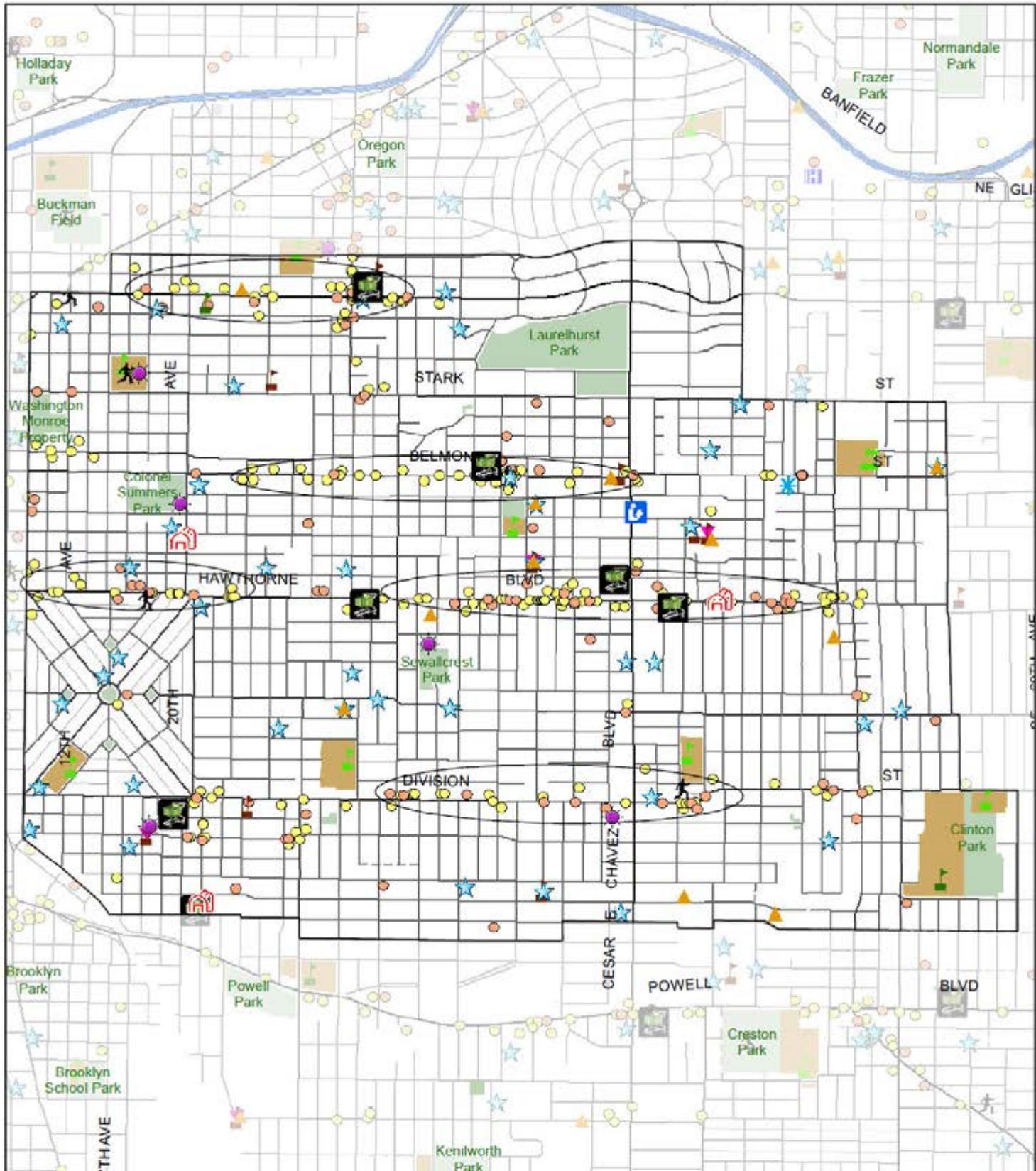


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# Belmont-Hawthorne-Division Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

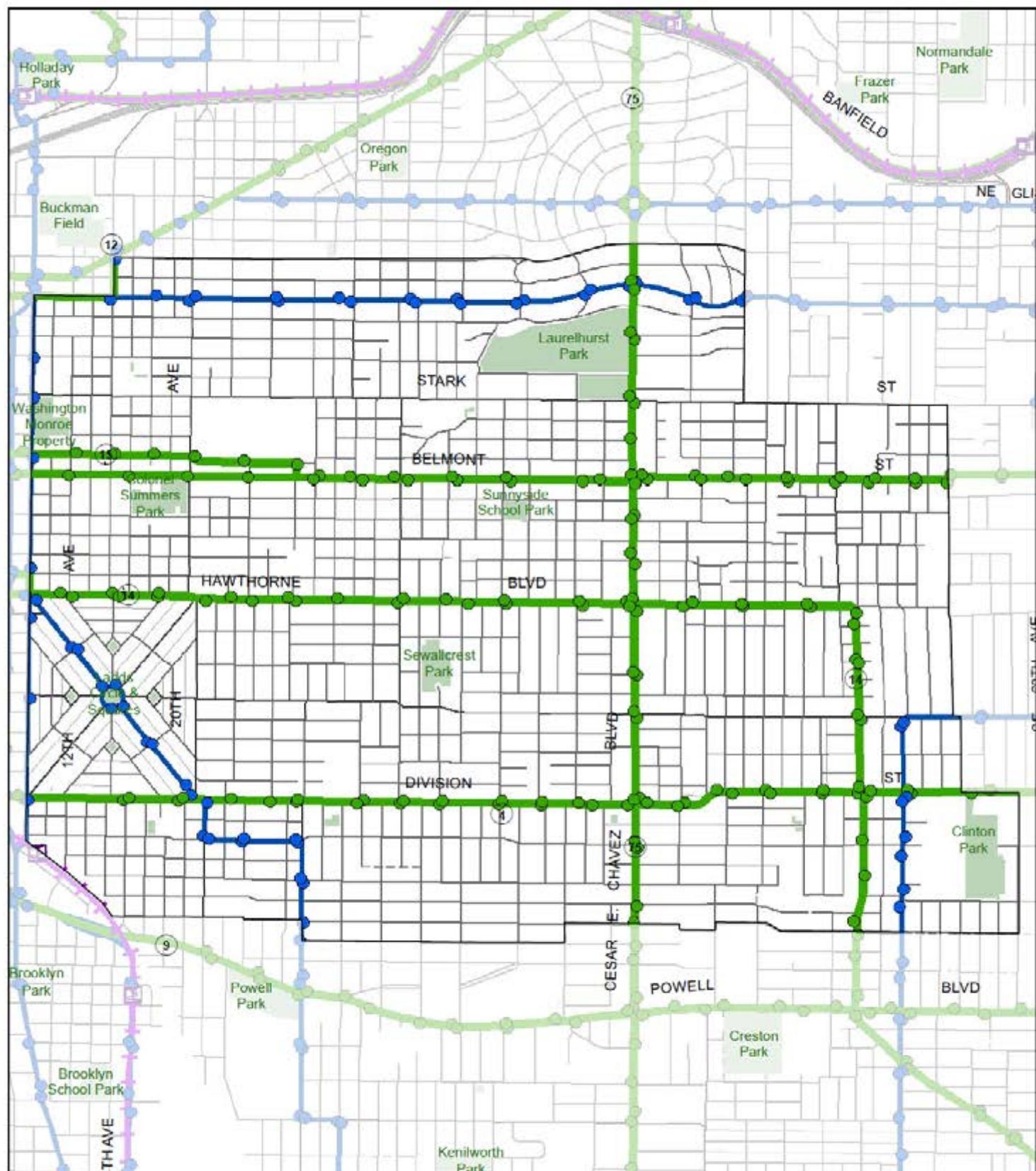


0 1,000 2,000 3,000 Feet

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# Belmont-Hawthorne-Division Analysis Area



## Transit Infrastructure

February 1, 2012

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### Light Rail Stops

- MAX
- Street Car
- MAX
- Streetcar

### Bus Stops

- Frequent Stops
- Standard Stops
- Rush Hour Stops
- Frequent Service
- Standard Service
- Rush Hour Only Service
- City Boundary



0 1,000 2,000 3,000  
Feet

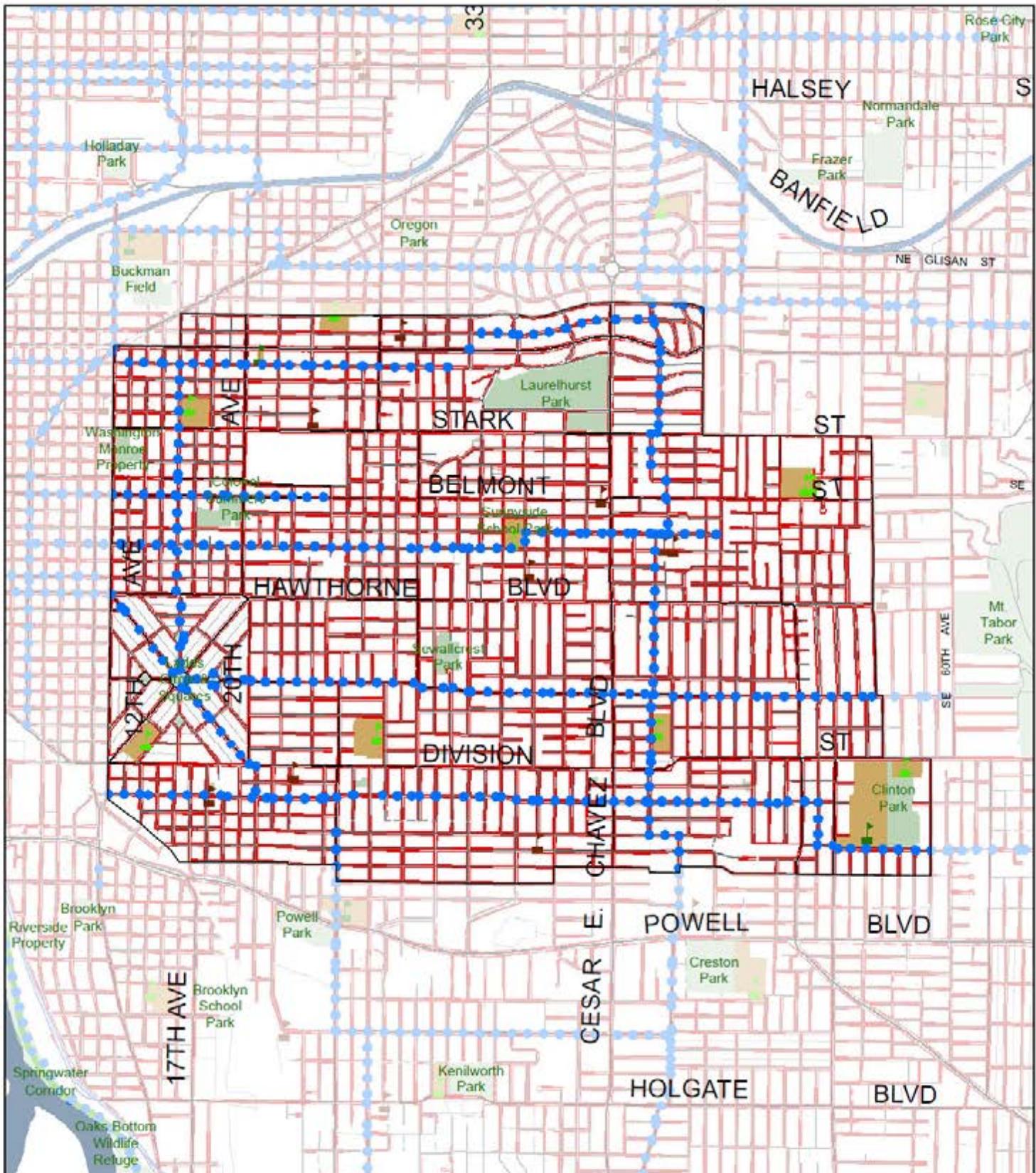


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# Belmont-Hawthorne-Division Analysis Area



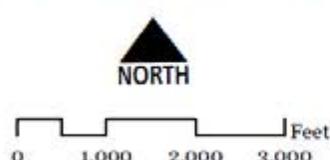
## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools

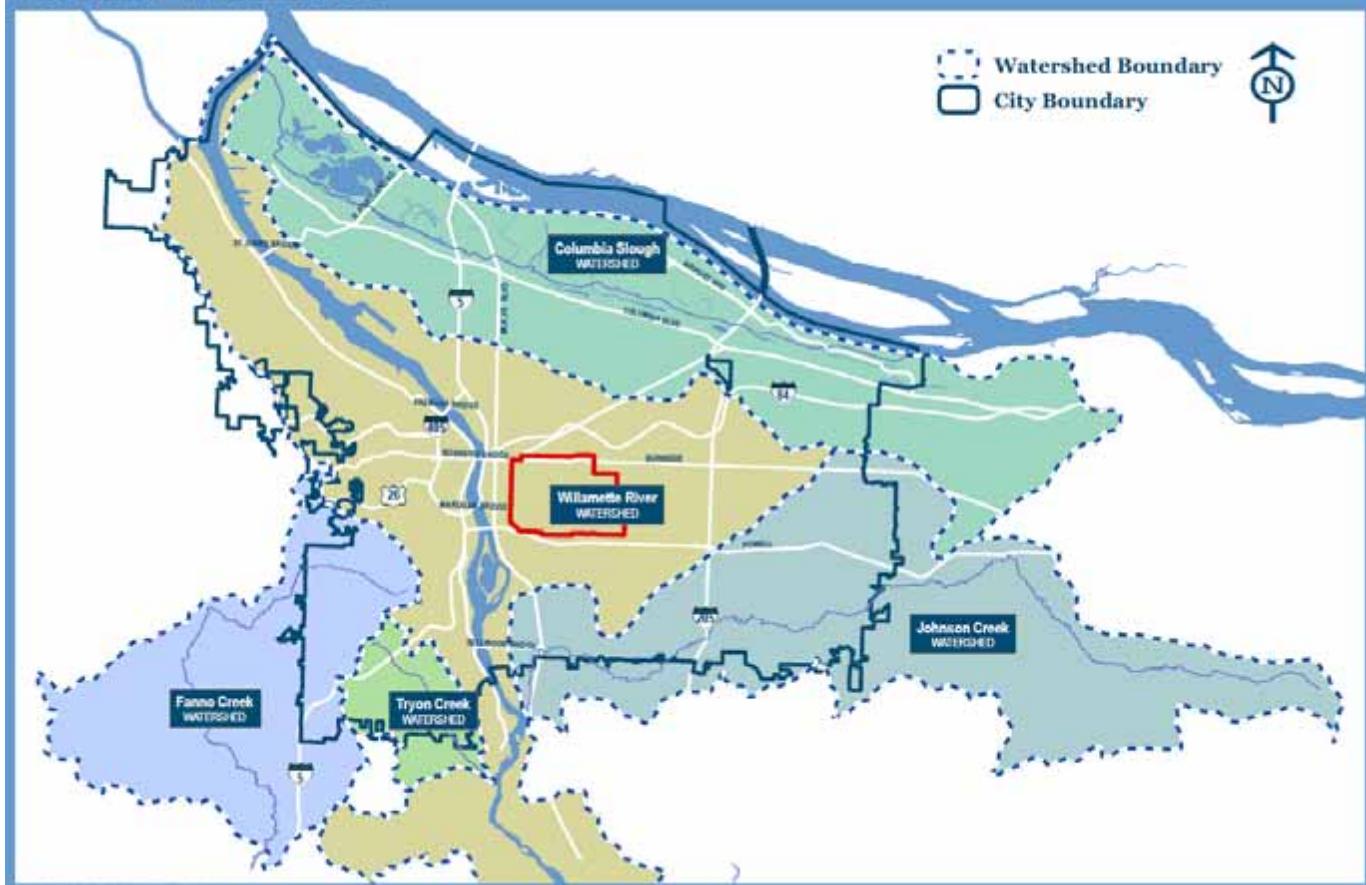


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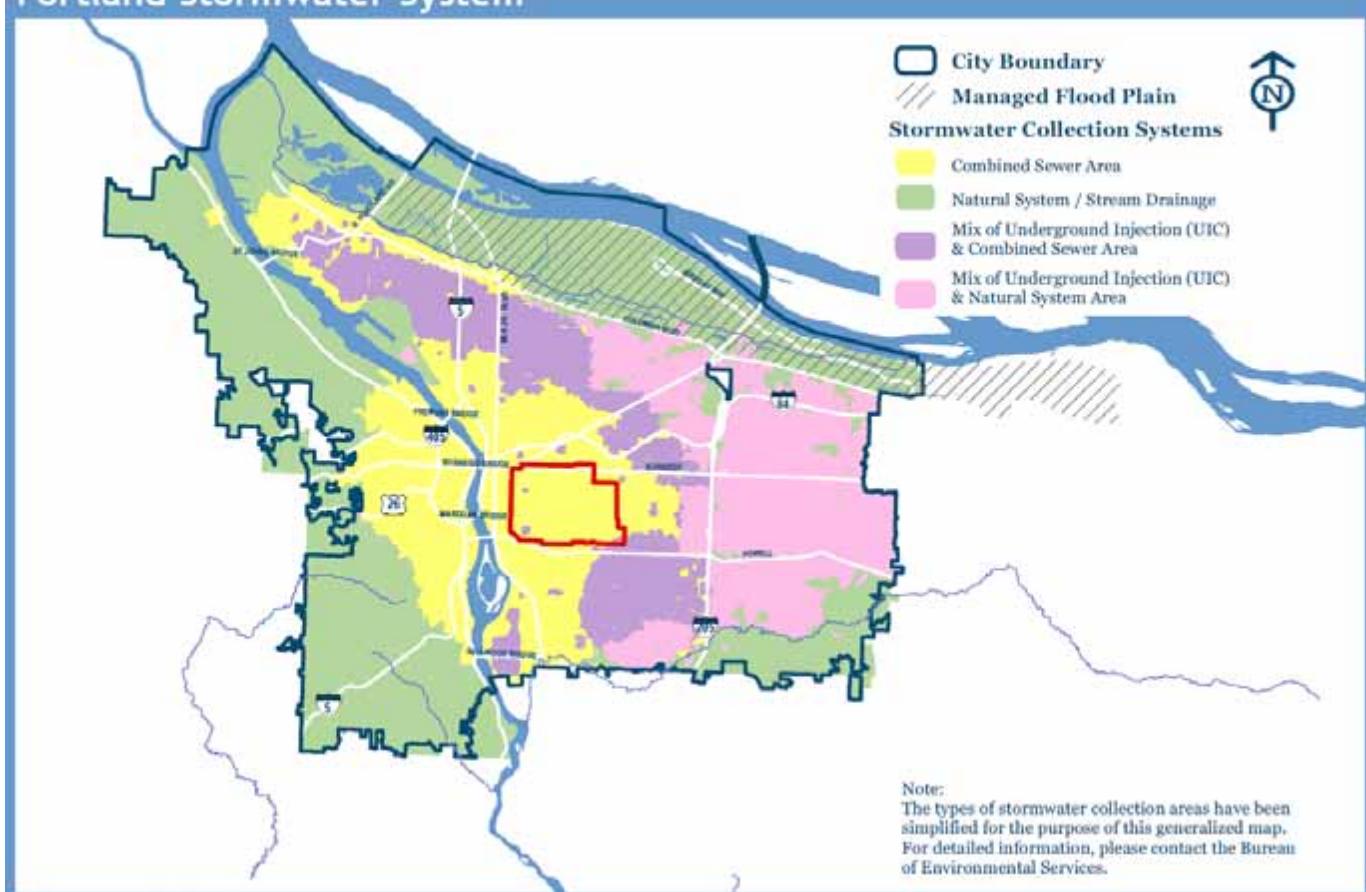


Sam Adams, Mayor - Susan Anderson, Director

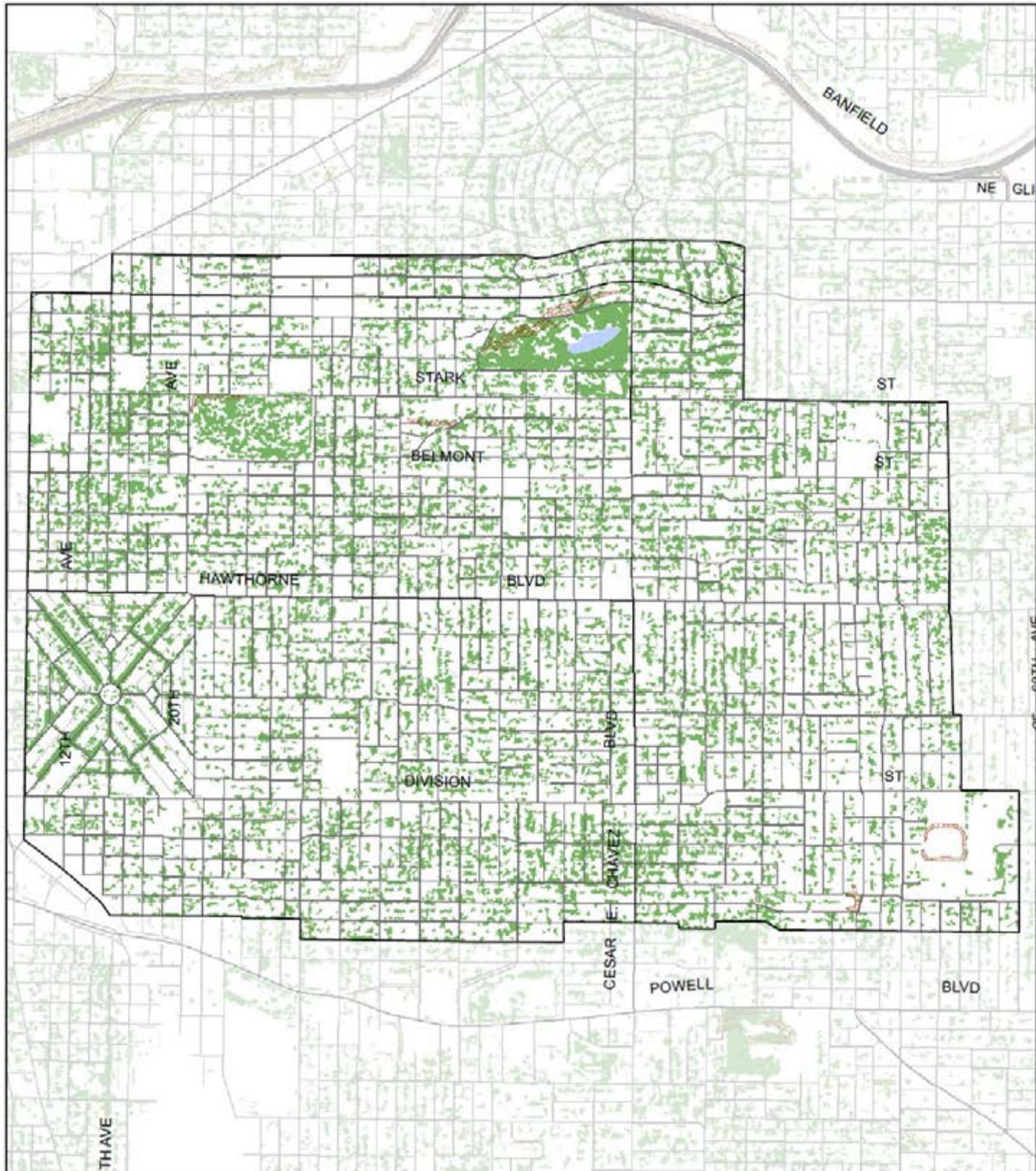
## Portland Watersheds



## Portland Stormwater System



# Belmont-Hawthorne-Division Analysis Area



August 9, 2011

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- Open channel stream
- Piped/culverted stream
- City Boundary

0 1,000 2,000 3,000 Feet



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# Belmont-Hawthorne-Division Analysis Area

## Demographics (2000 – 2010)

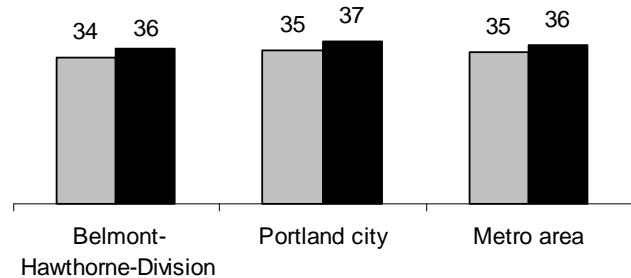
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

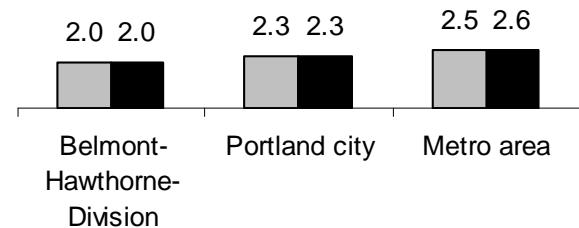
	Belmont-Hawthorne-Division	Portland city	Metro area
2010	36,907	583,776	2,226,009
2000	35,434	529,121	1,927,881
% change	4%	10%	15%

■ 2000 ■ 2010

### Median Age

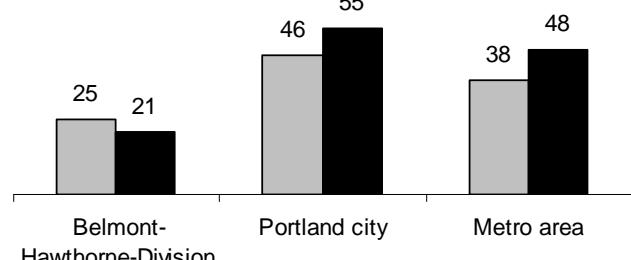


### Average Household Size

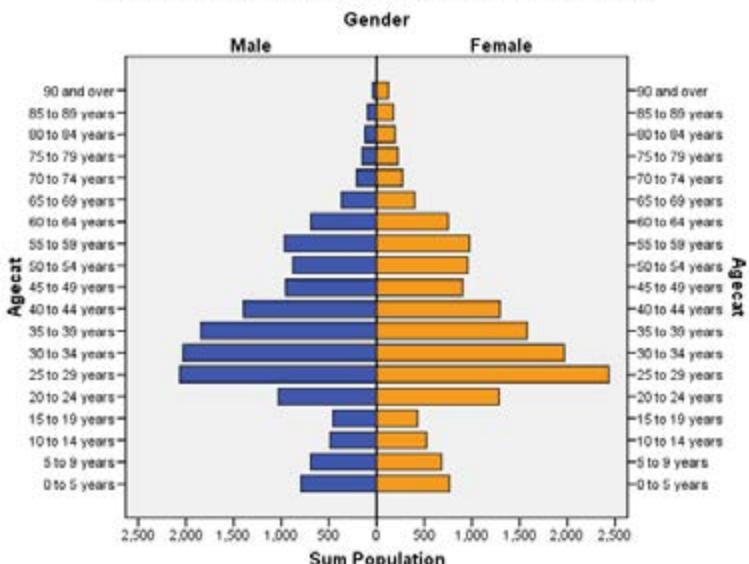


### Diversity Index

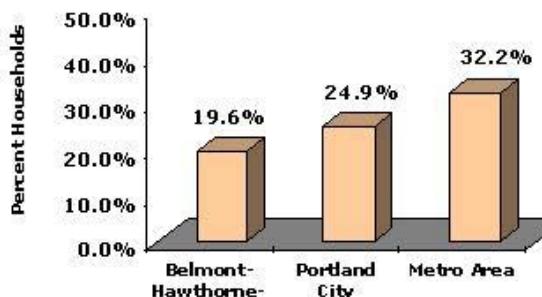
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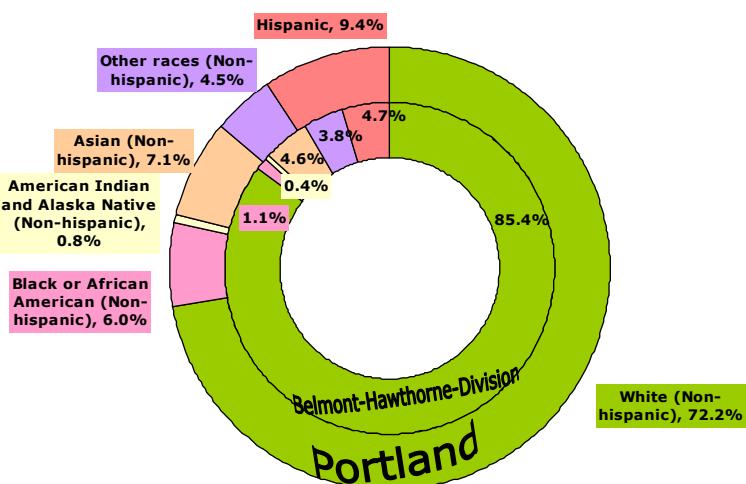
Population Pyramid for Belmont-Hawthorne-Division, 2010



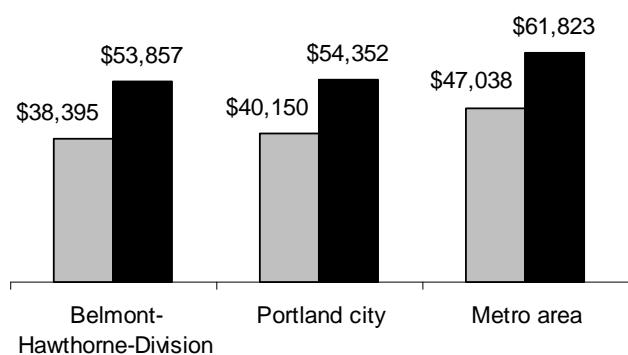
Households with Children Under 18 Years: 2010



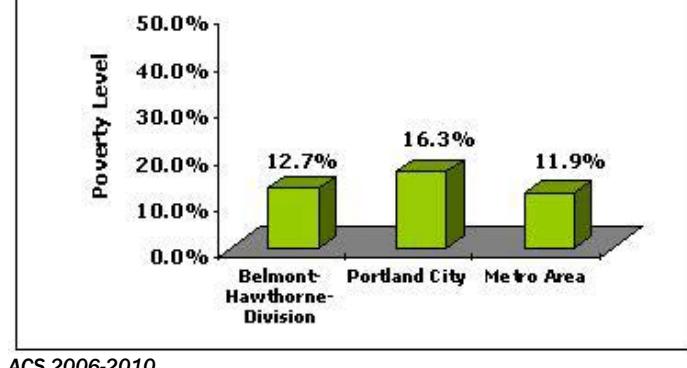
Racial and Ethnic Distribution in Portland vs. Belmont-Hawthorne-Division



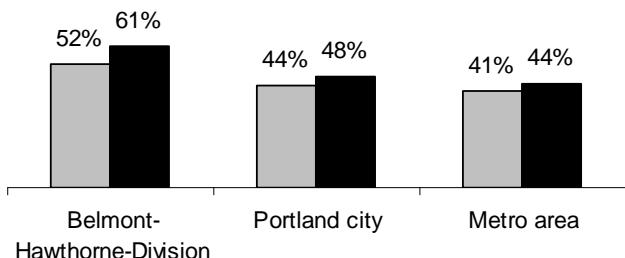
## Median Household Income



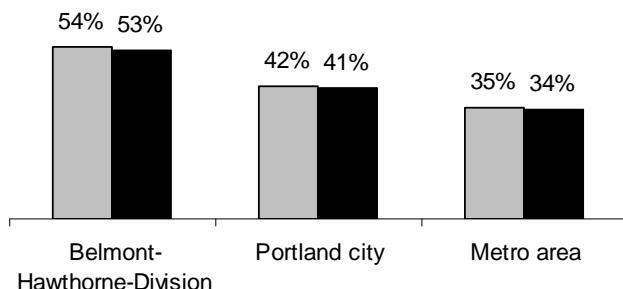
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Belmont-Hawthorne-Division	Portland city	Metro area
2010	\$302,669	\$253,184	\$273,500
2000	\$181,054	\$154,721	\$168,347
% change	67.2%	63.6%	62.5%

## Belmont-Hawthorne-Division Analysis Area

### Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

#### RETAIL

##### Square Feet

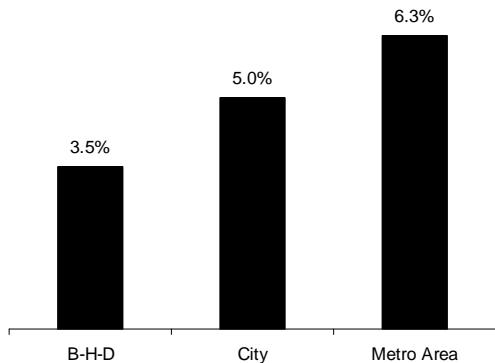
B-H-D	City	Metro Area
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#### OFFICE SPACE

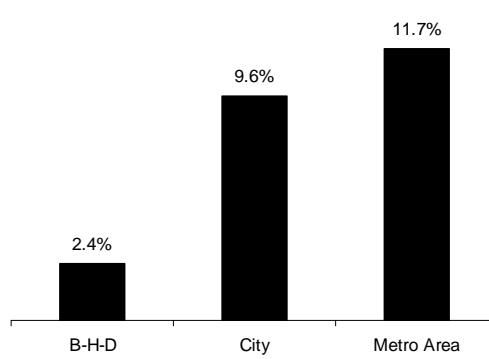
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B-H-D	City	Metro Area
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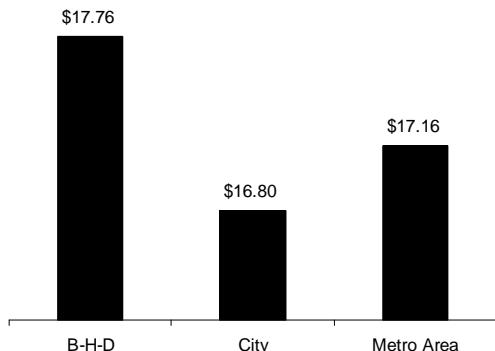
##### Retail Vacancy



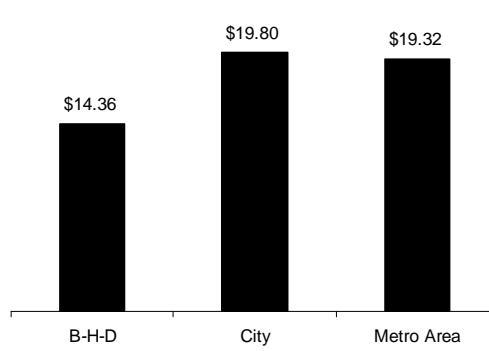
##### Office Vacancy



##### Retail Rents



##### Office Rents



# Belmont-Hawthorne-Division Analysis Area

## Retail Market Profile

**Retail Gap = \$52 million**

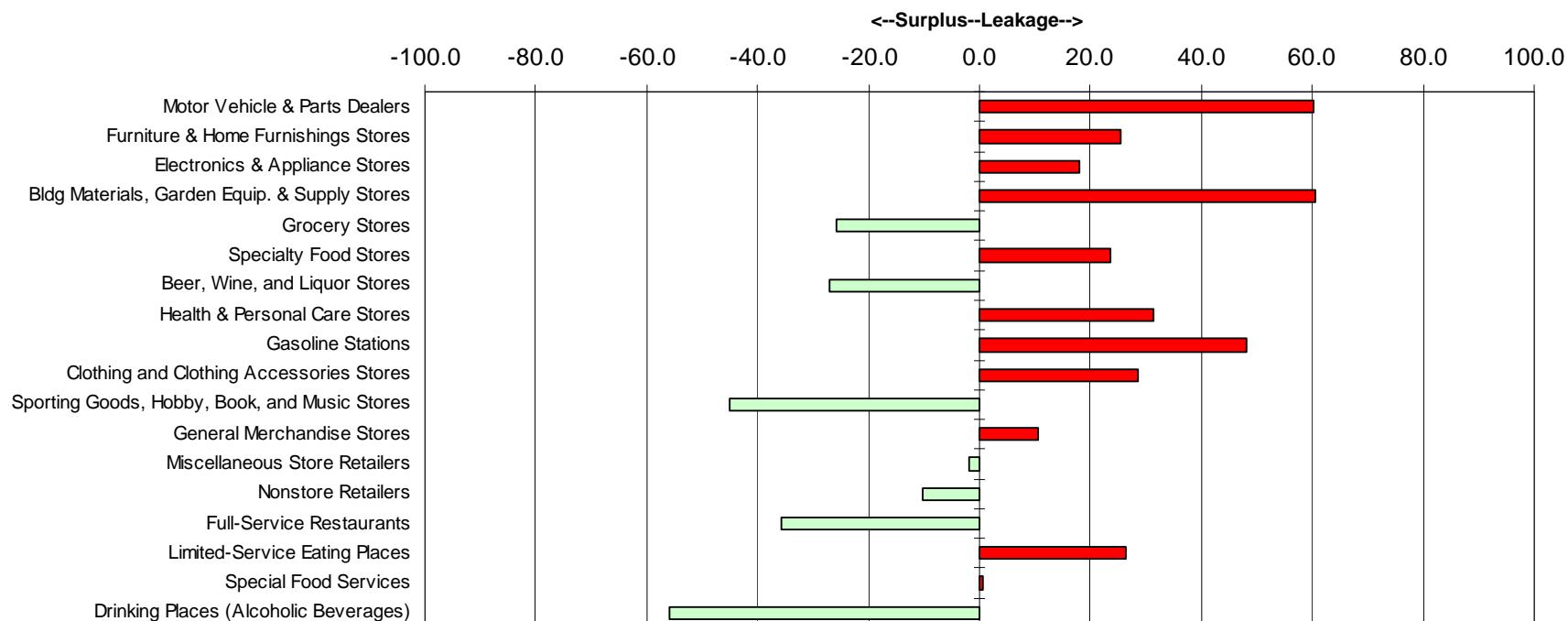
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$432,445,295	\$380,631,552	\$51,813,743	6.4	485
Total Retail Trade (NAICS 44-45)	\$367,909,912	\$289,204,067	\$78,705,845	12.0	298
Total Food & Drink (NAICS 722)	\$64,535,383	\$91,427,485	-\$26,892,102	-17.2	187

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Belmont-Hawthorne-Division Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

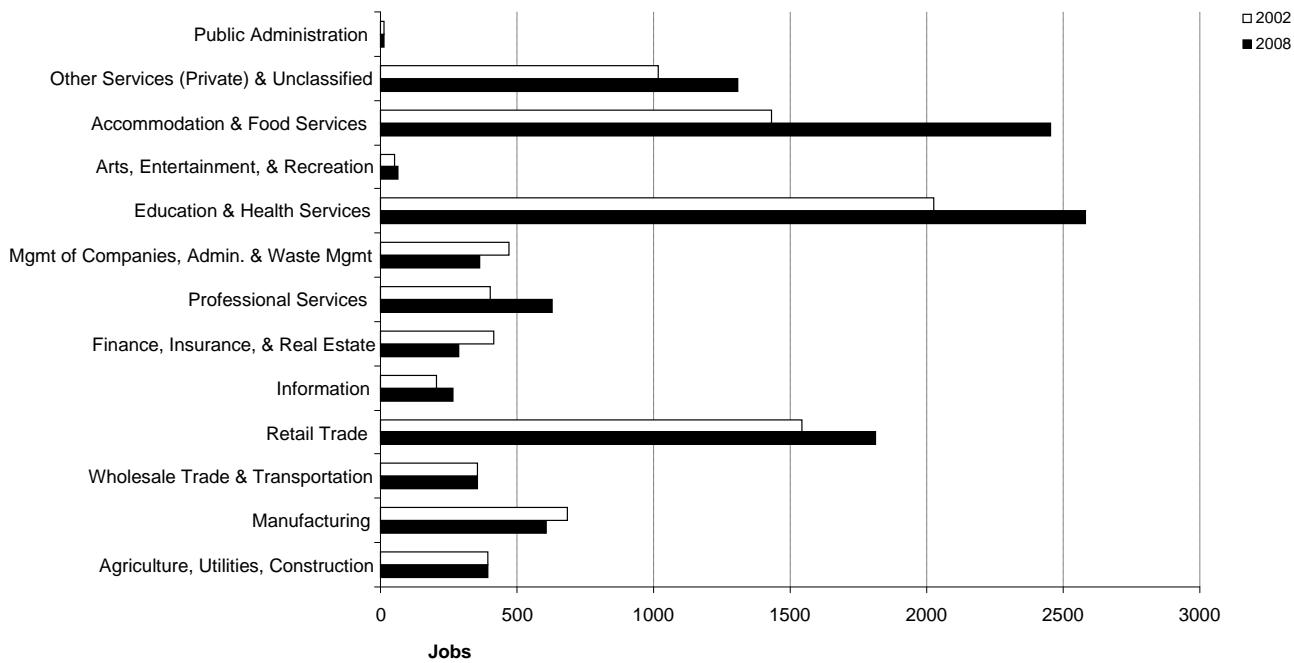
Source: Oregon Employment Department (OED)

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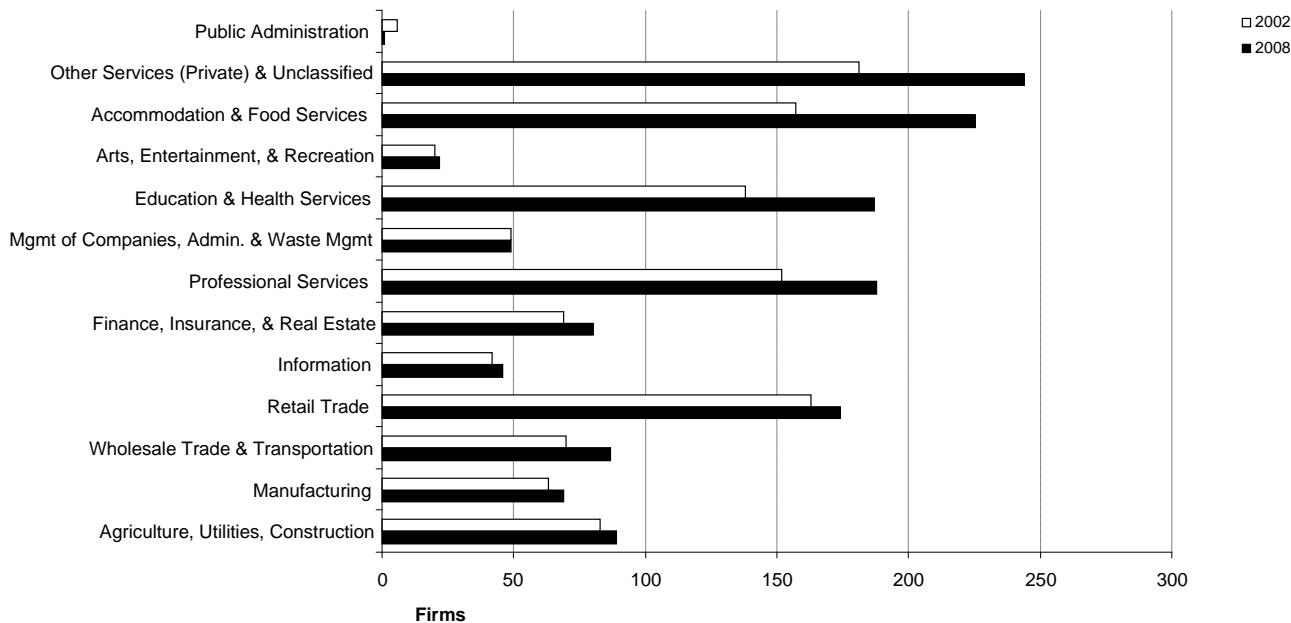
*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	9,004	11,132	+2,128
Total Firms	1,193	1,461	+268
Average Annual Wages	\$24,773	\$28,551	+\$3,778

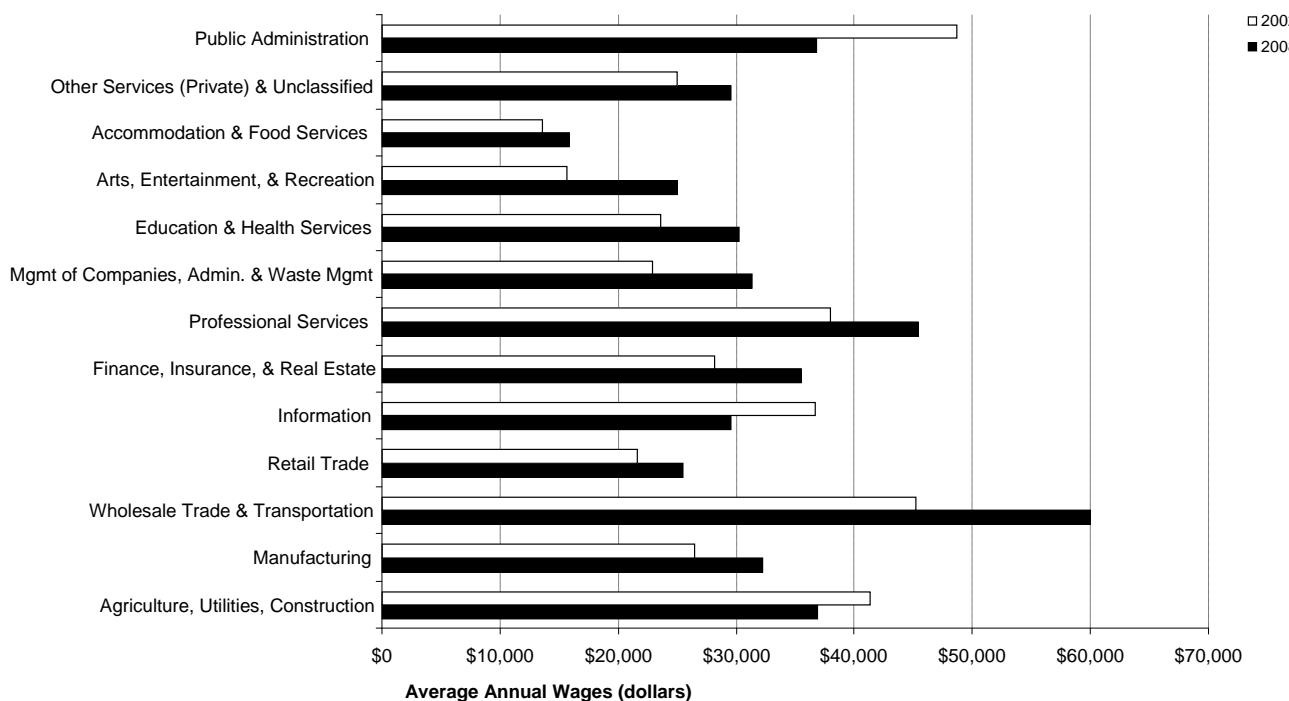
### Total Jobs



### Total Firms



### Average Annual Wages

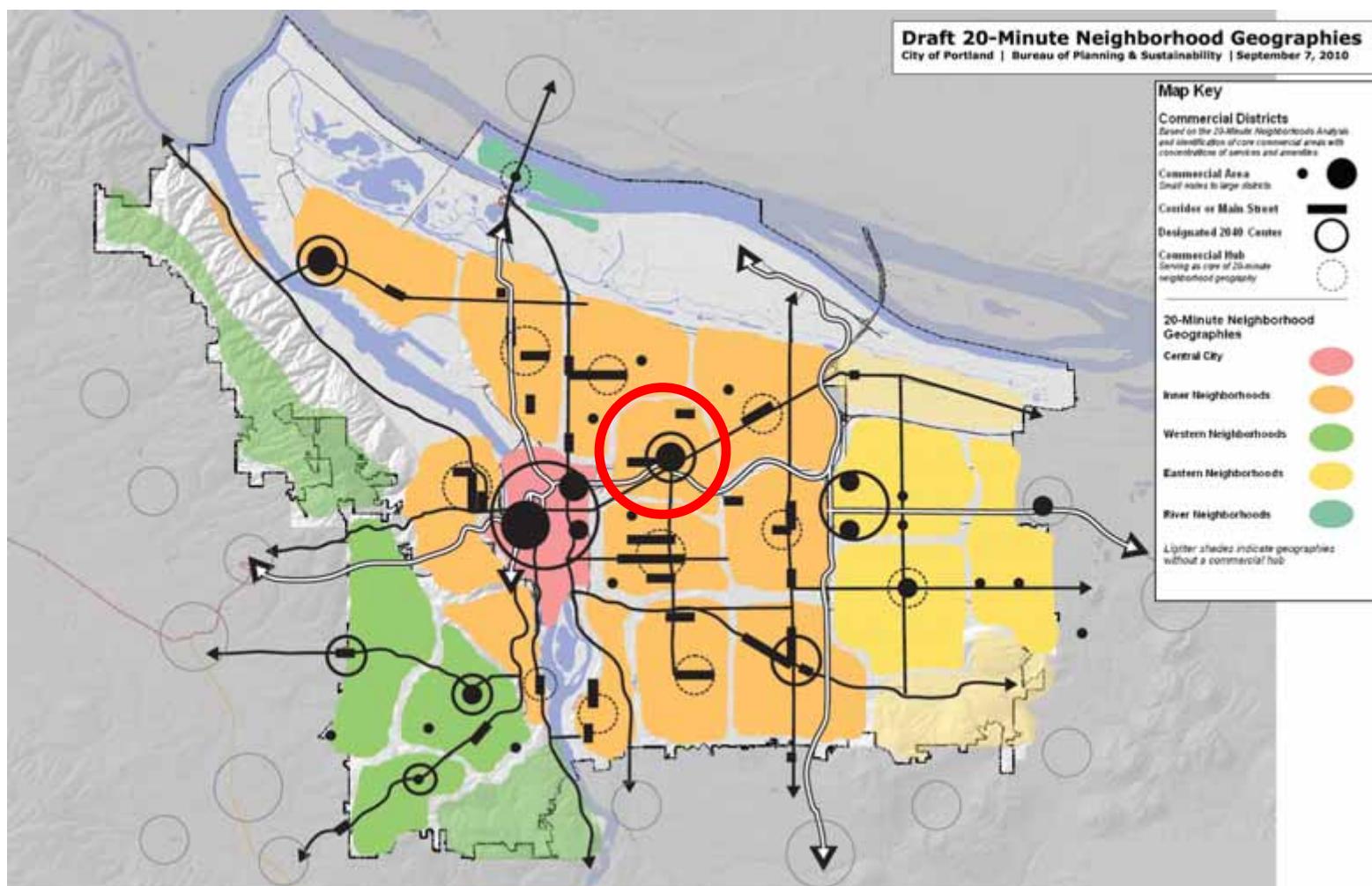




## Hollywood Area

Including Hollywood, Alameda, Beaumont-Wilshire, Grant Park, Irvington, Kerns, Sullivan's Gulch, and parts of the Laurelhurst, Rose City Park, and North Tabor neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Hollywood Analysis Area

## Services and Amenities

Population: 34,200 people (15,800 households)  
 Land Area: 3.9 square miles (8,000 people per sq. mile)

### Commercial Districts

The area has a number of distinct commercial districts of varying sizes. The largest concentration of commercial services is in the Hollywood District. Other significant concentrations are located along NE Broadway (west of the Hollywood District) and in Beaumont Village along NE Fremont. Smaller clusters of commercial services exist around NE Glisan and 28<sup>th</sup> Avenue, at NE Glisan and 47<sup>th</sup> Avenue, and along NE Sandy Boulevard.

**Grocery stores:** 5 (1 store per 3,160 households)

**Retail gap:** \$65 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	83%
Within 1/2 mile of a public elementary school:	49%
Within 3 miles of a full-service community center*:	100%
Within 1/2 mile of a full-service grocery store:	57%
Within 1/4 mile of a frequent service transit stop:	60%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** 1 (Hollywood Library)

**Parks and Open Spaces:** 40 acres - including Grant Park, Oregon Park, Frazer Park, and Buckman Field

**Tree Canopy Coverage:** 22%

**Public Schools:** 2 high schools (Grant and Benson)

5 K-8 schools (Alameda Elementary, Beaumont Middle School, Beverly Cleary K-8, Irvington K-8, Laurelhurst K-8)

**Colleges** (campus): None

**Hospitals:** 1 (Providence Portland Medical Center)

**Farmers Markets:** 2 (Hollywood Farmers Market, Irvington Farmers Market)

**Transit Centers/Stations:** 1 (Hollywood Transit Center)

**Walkable Access Score:** 70 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Hollywood, Grant Park, Sullivan's Gulch, Irvington, Alameda, Beaumont-Wilshire, Rose City Park, North Tabor, Laurelhurst, Kerns

**Business Associations:** Hollywood Boosters, Beaumont Business Association, Northeast Broadway Business Association, North-Northeast Business Association

## Urban Form Characteristics

Much of this area is composed of a grid of residential blocks (curvilinear in Laurelhurst), originally developed during the Streetcar Era with a continuous system of sidewalks. The area is anchored by the Hollywood District and has two major corridors, Sandy Boulevard and Broadway. These commercial areas have a mix of street-fronting buildings and more auto-oriented development. The area also includes the Fremont main street. Prominent topographical features include Alameda Ridge and Sullivan's Gulch, where the I-84 Freeway is located.

**Access issues.** Good street and sidewalk connectivity, but the I-84 Freeway acts as a barrier. Good access to transit and to commercial and community services, although northwest portions of the area are beyond convenient walking distance to services.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Hollywood Town Center:	139 acres
Main Streets:	4.3 miles (Sandy, Broadway, Fremont)
Station Communities:	1

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,229	69%	84
Multi-Family Residential:	226	13%	49
Commercial/Mixed-Use:	235	13%	98
Employment:	7	.4%	2
Industrial:	14	.8%	1
Open Space:	68	4%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

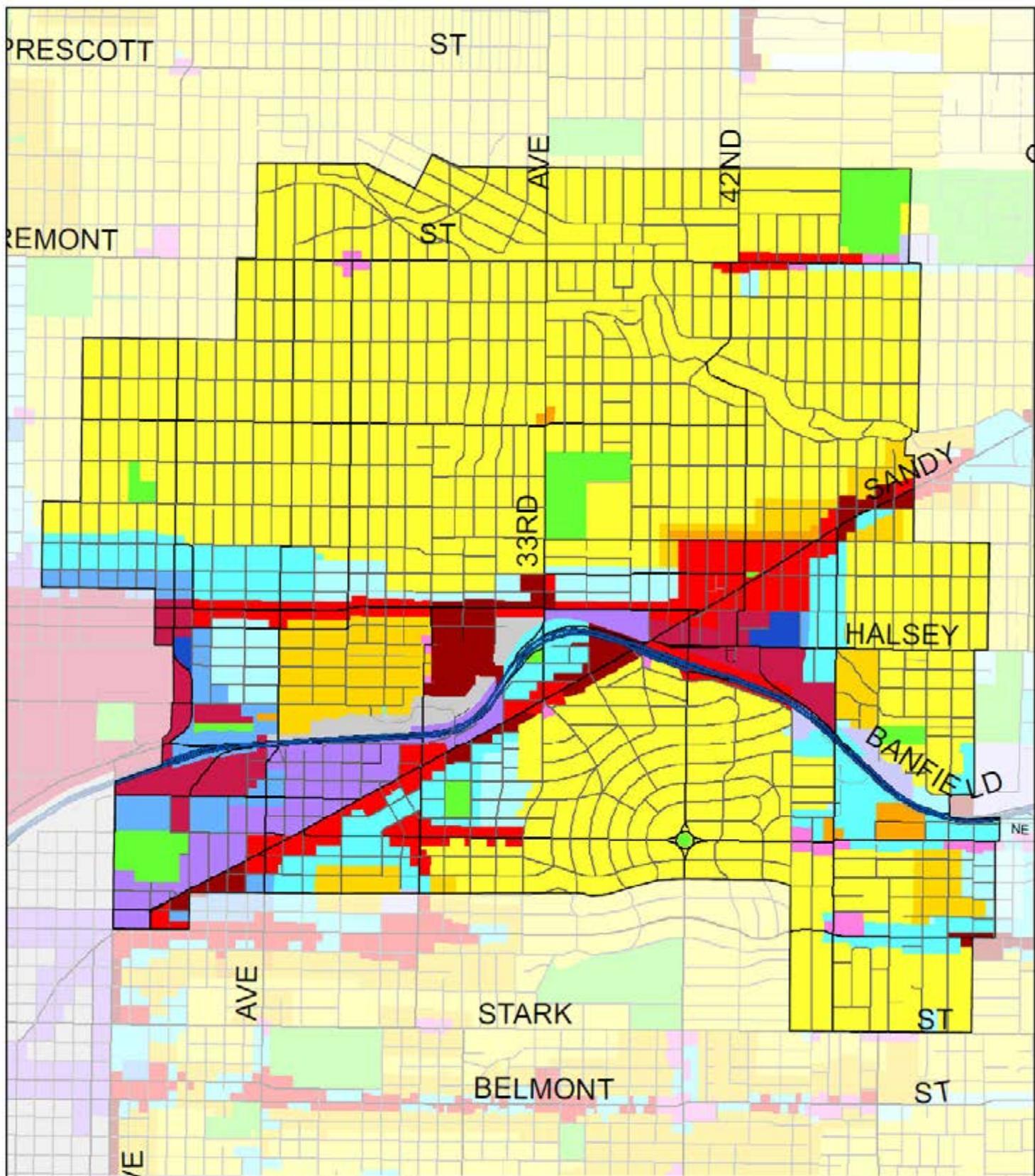
2010 Housing Units (Census):	16,541
2035 Housing Units:	21,400

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Hollywood Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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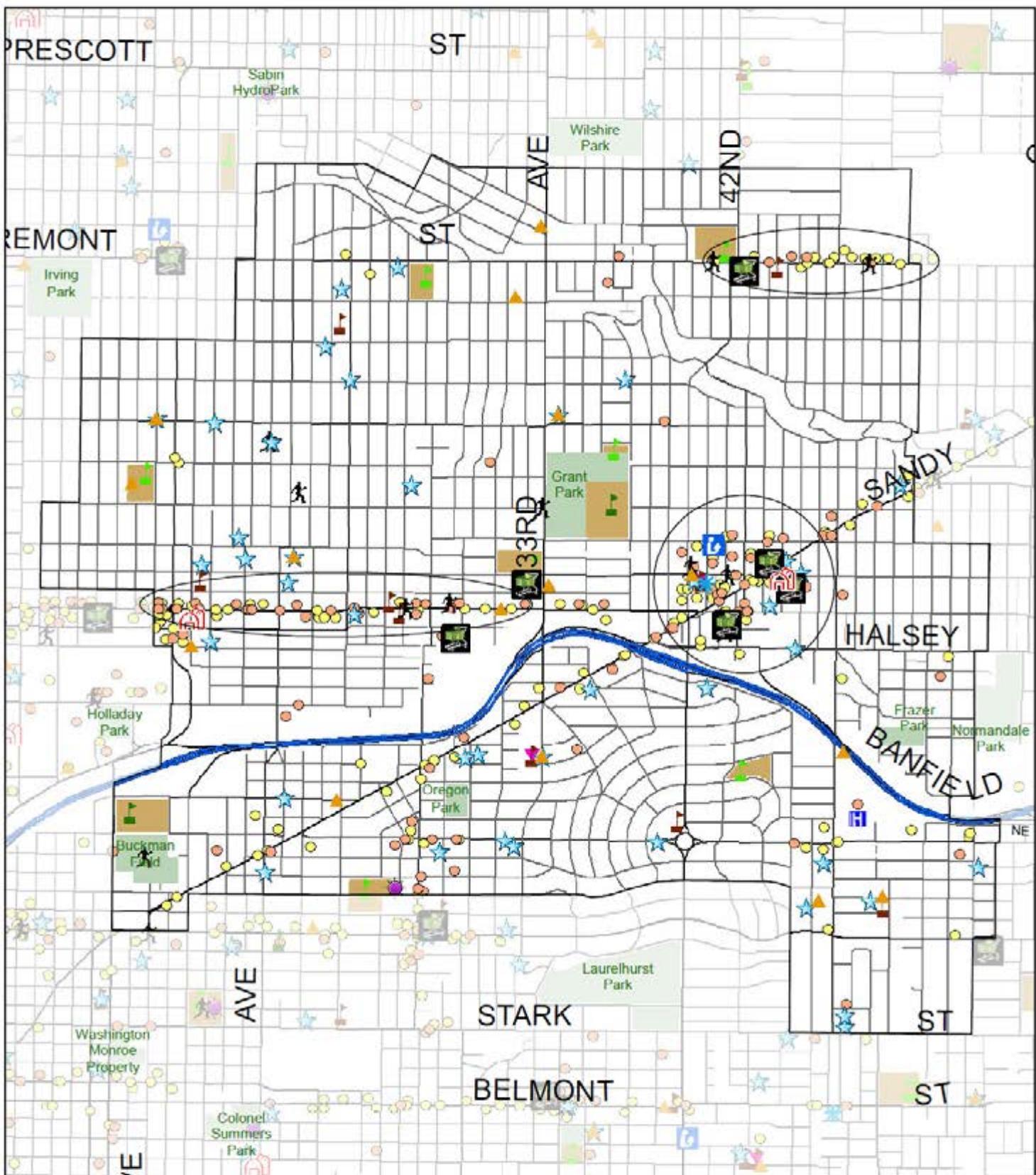


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Sam Adams, Mayor • Susan Anderson, Director

# Hollywood Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Farmers Markets
- Community Gardens
- Community Centers
- Public HS
- Public K-8
- Private Schools
- Preschools
- ▲ Daycare Centers
- County Health Clinic
- County Aging Services



0 1,000 2,000 3,000 Feet

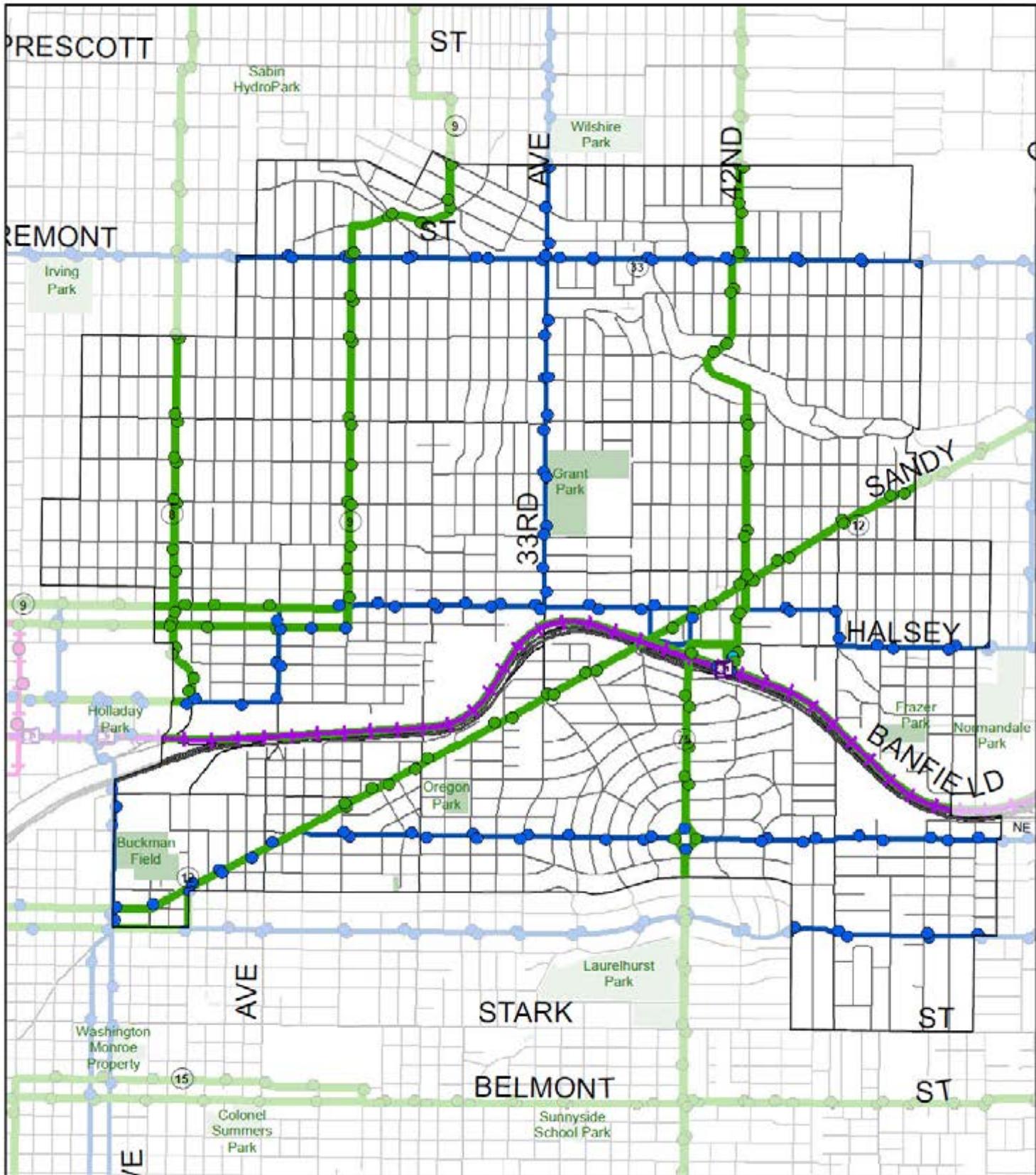


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City of Portland  
Sam Adams, Mayor - Jason Allen, Director

# Hollywood Analysis Area



## Transit Infrastructure

February 1, 2012

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Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX	Rush Hour Stops
Streetcar	
	<b>Green Line</b>
	<b>Blue Line</b>
	<b>Yellow Line</b>
	<b>Dashed Line</b>



0 1,000 2,000 3,000  
Feet

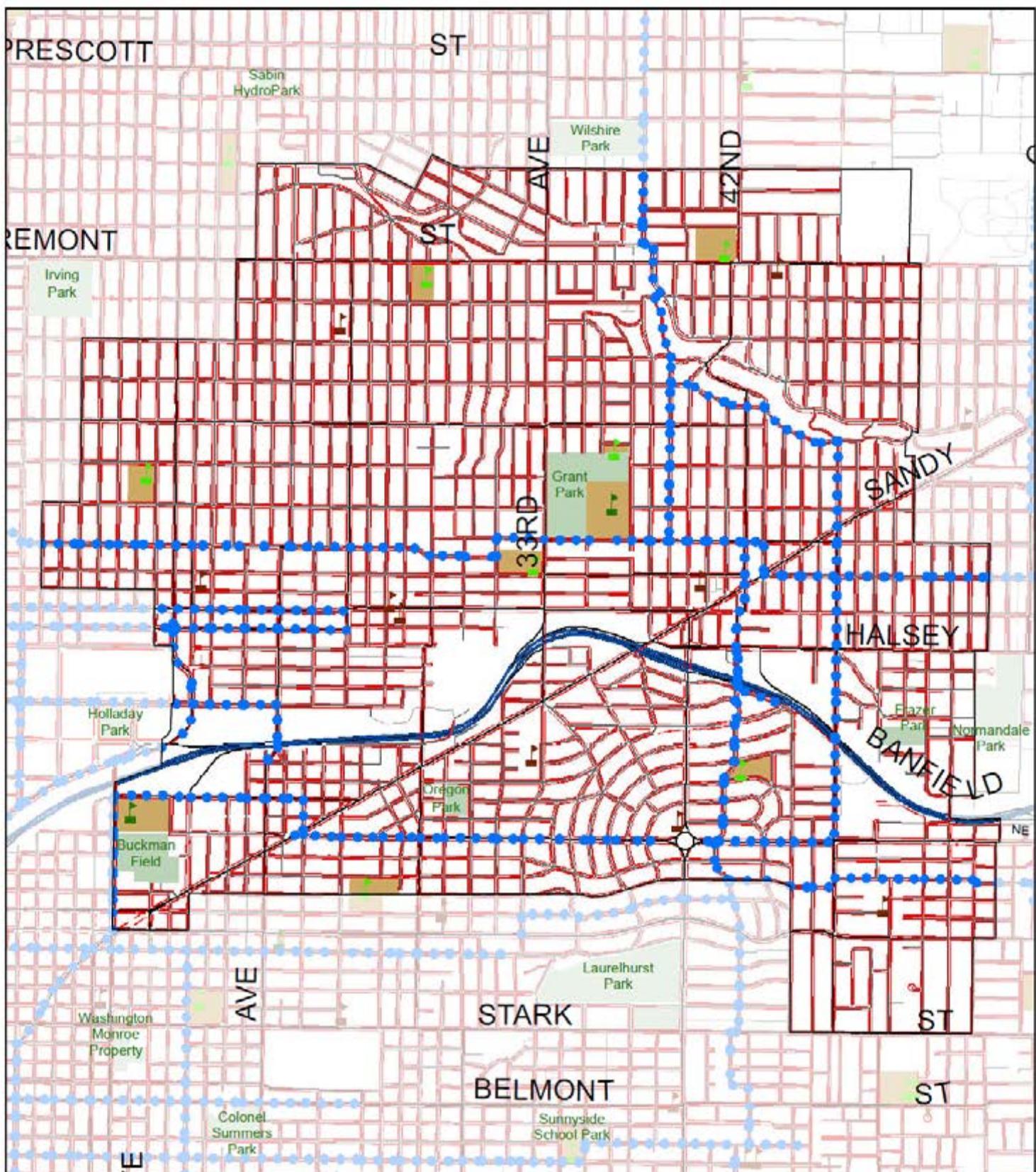


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# Hollywood Analysis Area



## Sidewalks and Bicycle Infrastructure

February 1, 2012

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

■ Public HS

■ Public K-8

■ Private Schools



0 1,000 2,000 3,000 Feet

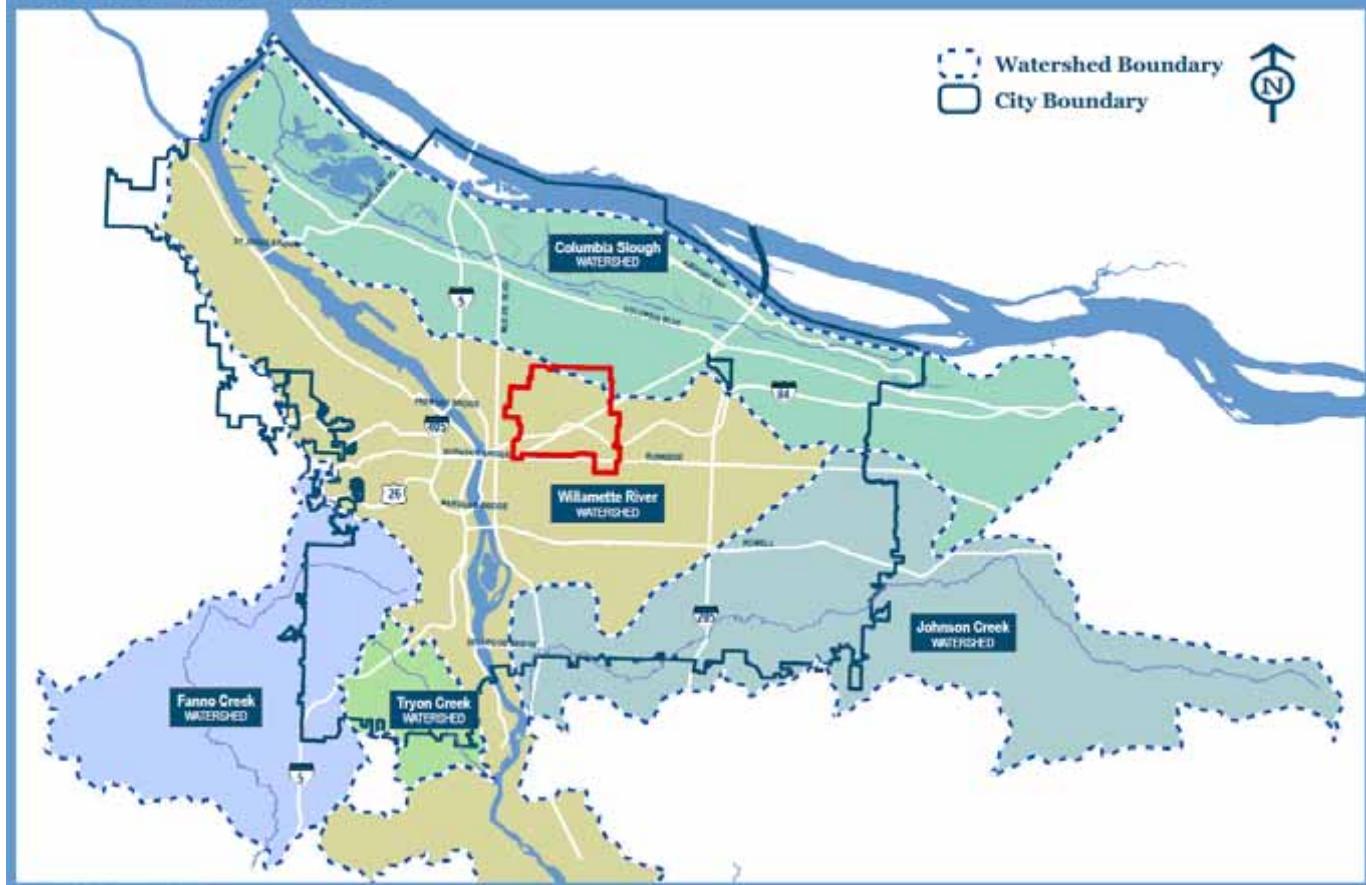


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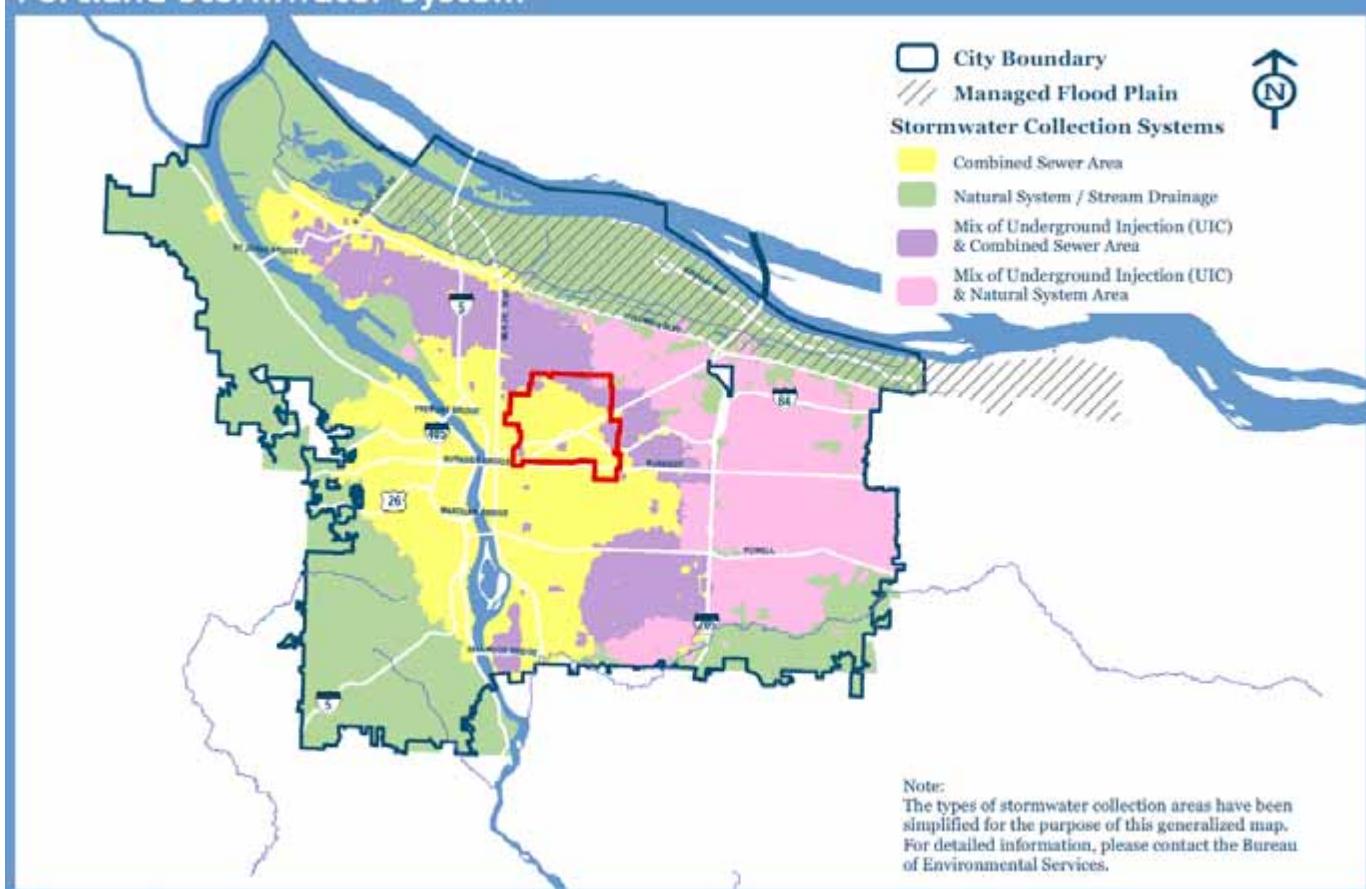


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Sam Adams, Mayor • Susan Anderson, Director

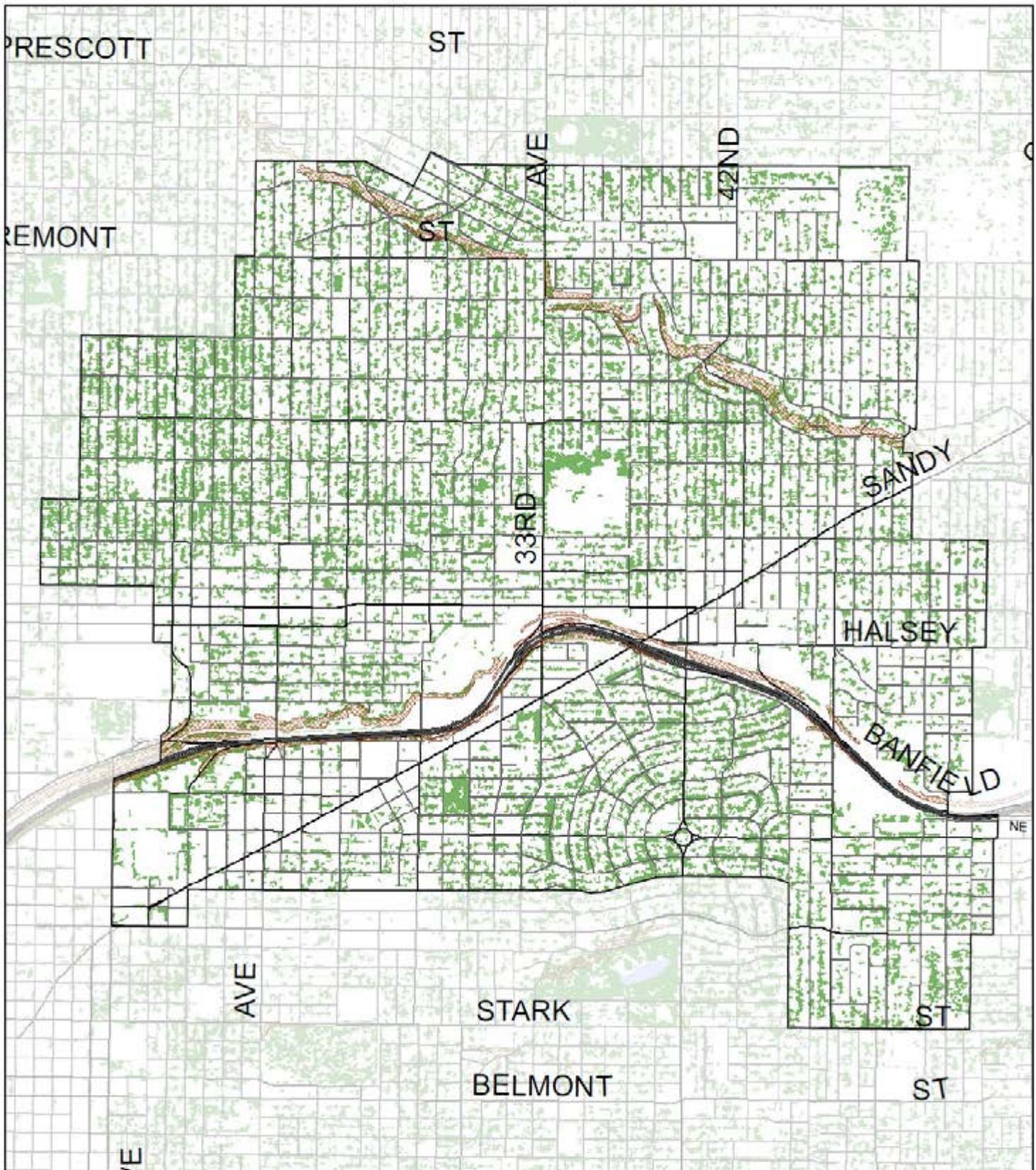
## Portland Watersheds



## Portland Stormwater System



# Hollywood Analysis Area



## Watersheds and Natural Features

February 1, 2012

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



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City of Portland, Oregon  
Hon. John J. Rogers, Mayor • Stacey Anderson, Director

# Hollywood Analysis Area

## Demographics (2000 – 2010)

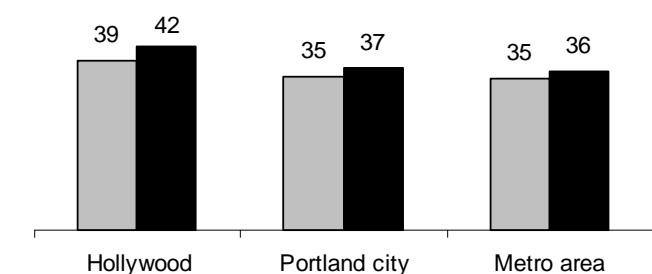
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

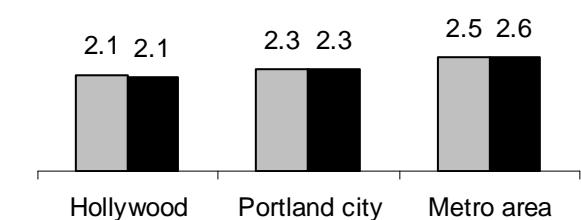
	Hollywood	Portland city	Metro area
2010	34,181	583,776	2,226,009
2000	32,973	529,121	1,927,881
% change	4%	10%	15%

Legend: 2000 (light gray), 2010 (dark gray)

### Median Age

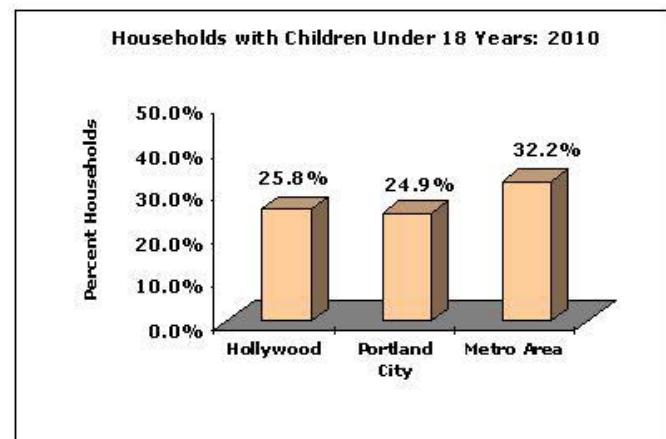
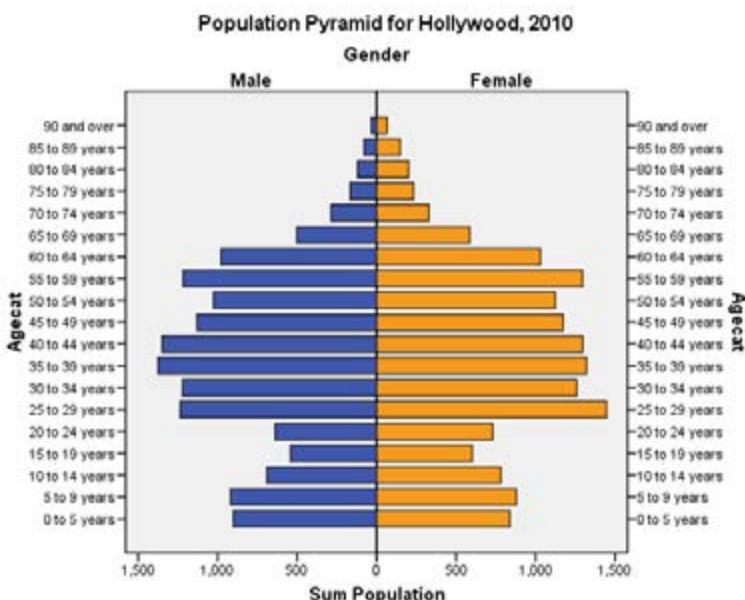
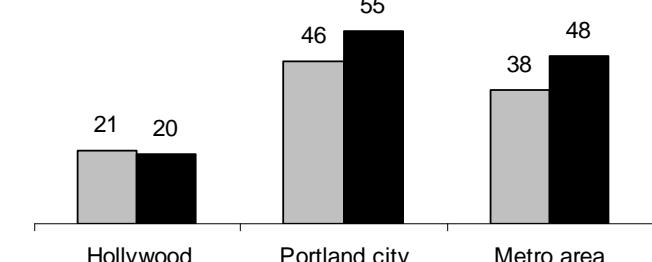


### Average Household Size

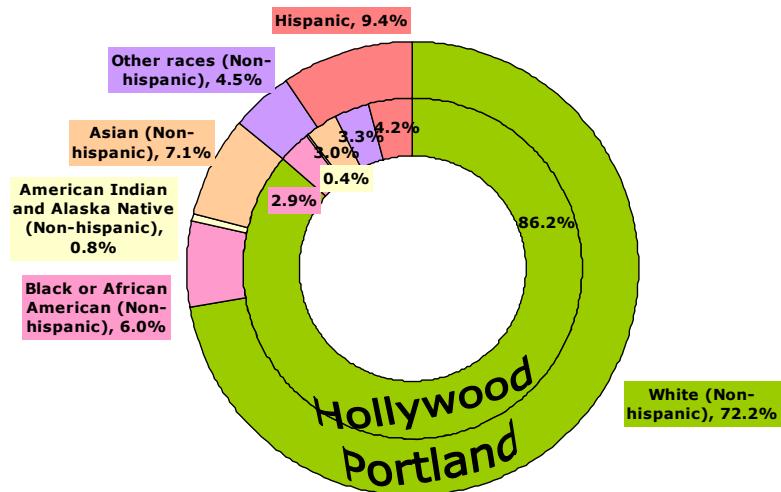


### Diversity Index

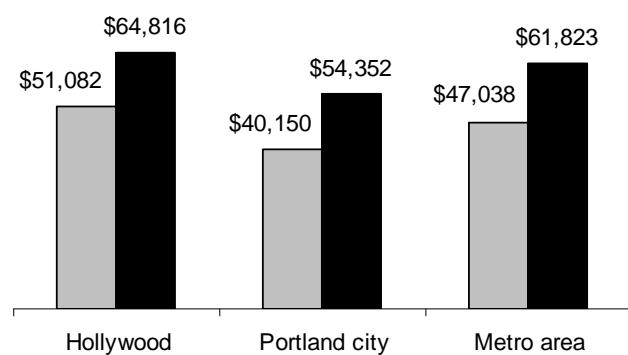
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



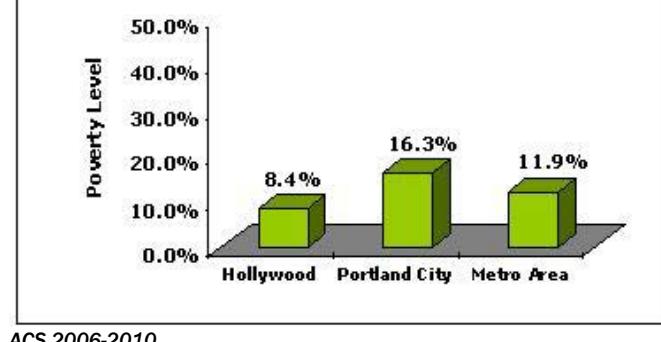
### Racial and Ethnic Distribution in Portland vs. Hollywood



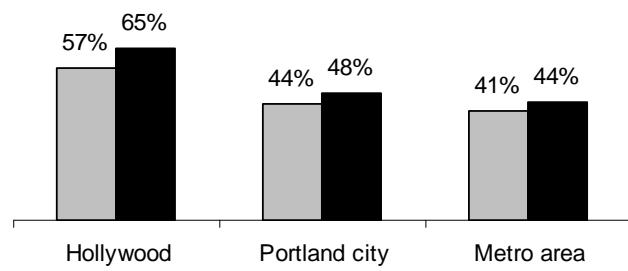
## Median Household Income



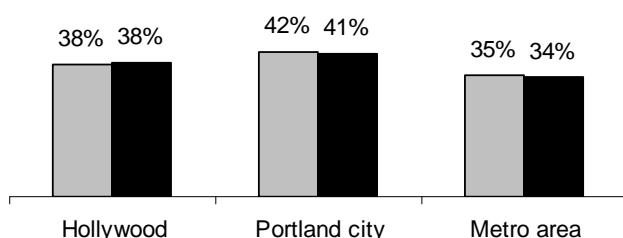
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Hollywood	Portland city	Metro area
2010	\$368,711	\$253,184	\$273,500
2000	\$223,268	\$154,721	\$168,347
% change	65.1%	63.6%	62.5%

# Hollywood Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

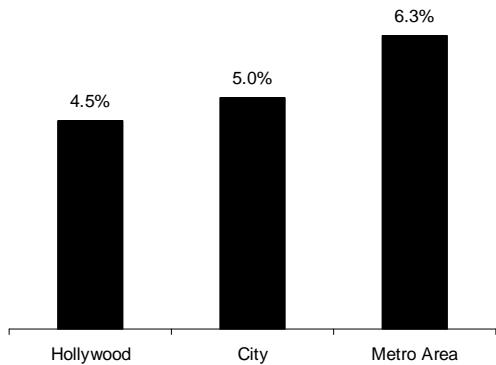
Hollywood	City	Metro Area
3,448,216	51,937,895	107,875,146

### OFFICE SPACE

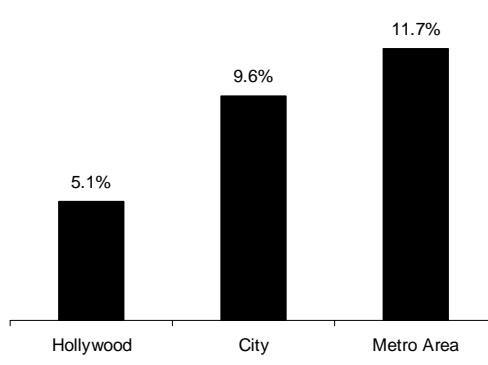
#### Square Feet

Hollywood	City	Metro Area
2,375,801	54,348,765	92,465,455

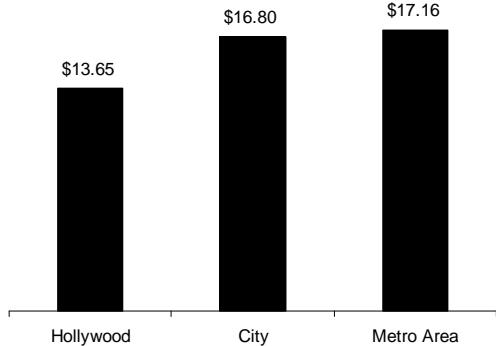
#### Retail Vacancy



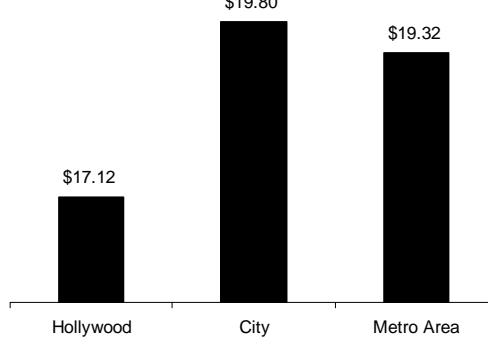
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Hollywood Analysis Area

## Retail Market Profile

**Retail Gap = \$65 million**

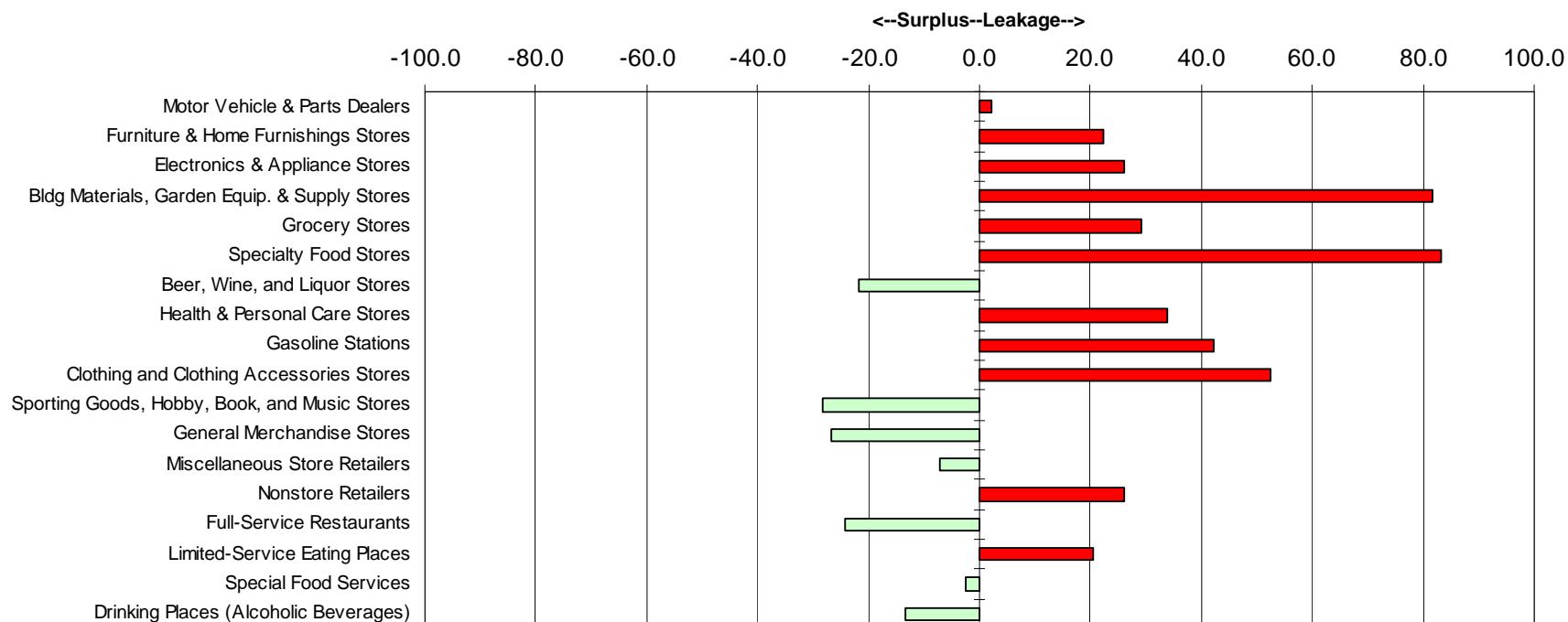
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$443,400,912	\$378,127,863	<b>\$65,273,049</b>	<b>7.9</b>	365
Total Retail Trade (NAICS 44-45)	\$377,856,611	\$307,163,731	<b>\$70,692,880</b>	<b>10.3</b>	241
Total Food & Drink (NAICS 722)	\$65,544,301	\$70,964,132	-\$5,419,831	-4.0	124

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Hollywood Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

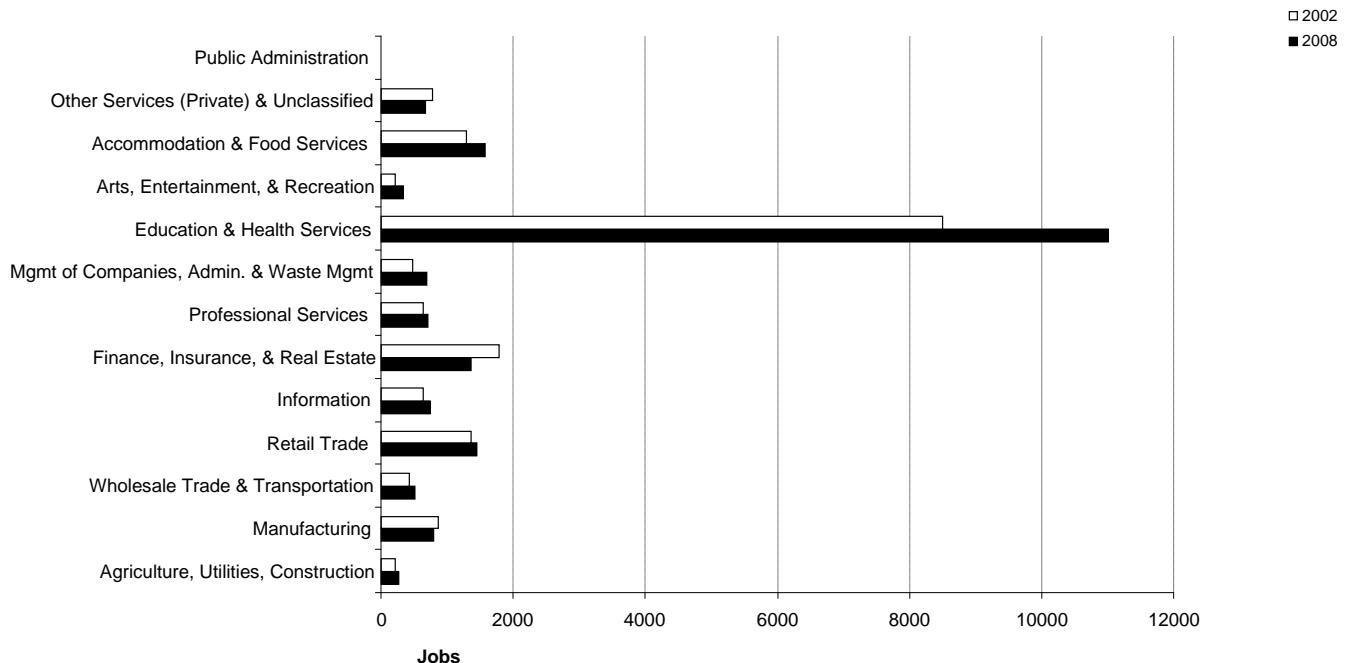
Source: Oregon Employment Department (OED)

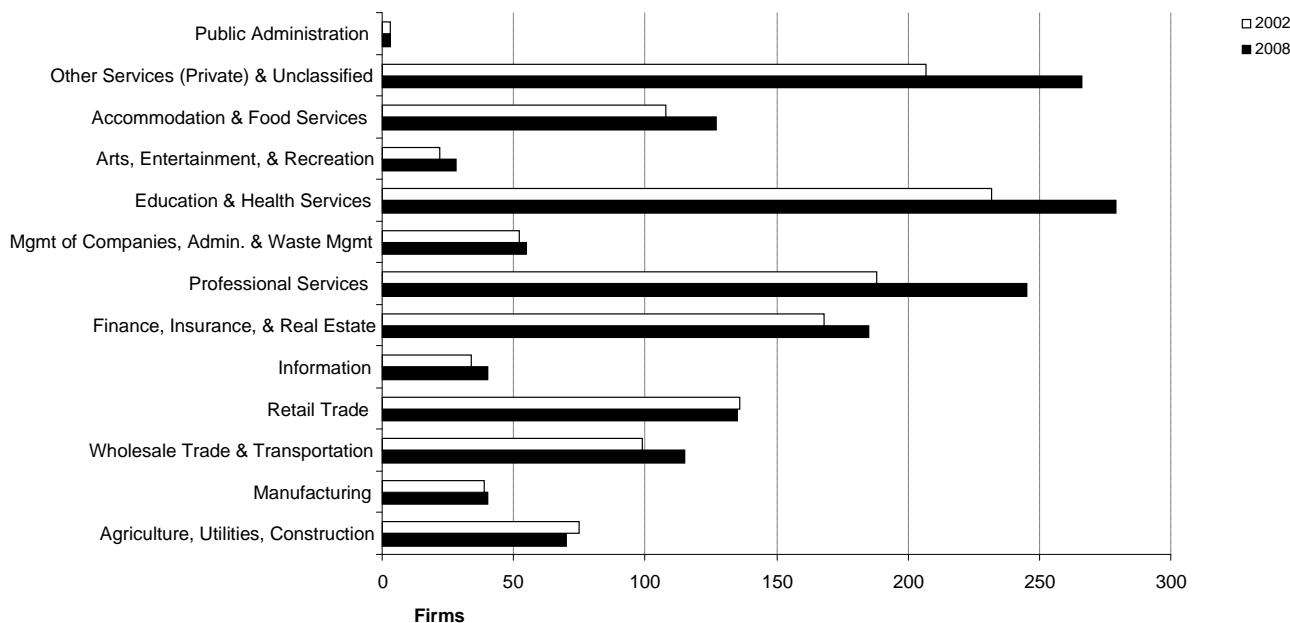
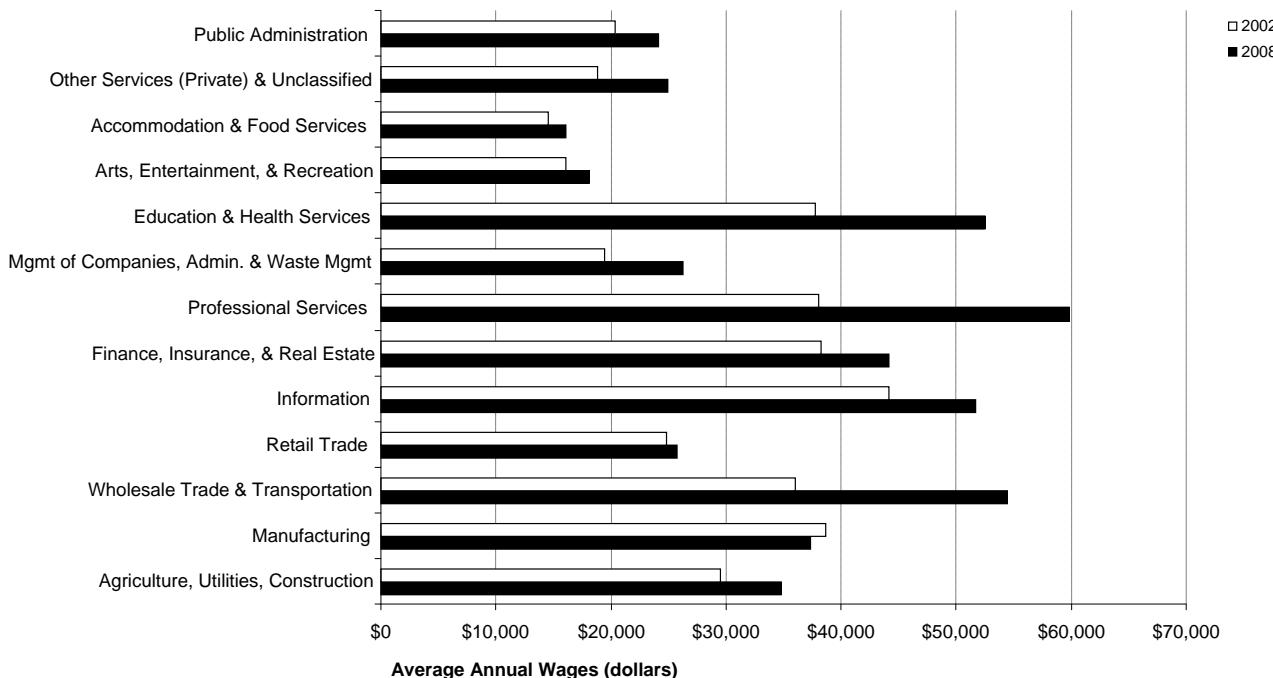
*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	17,167	20,132	+2,965
Total Firms	1,363	1,588	+225
Average Annual Wages	\$33,527	\$44,193	+\$10,666

### Total Jobs



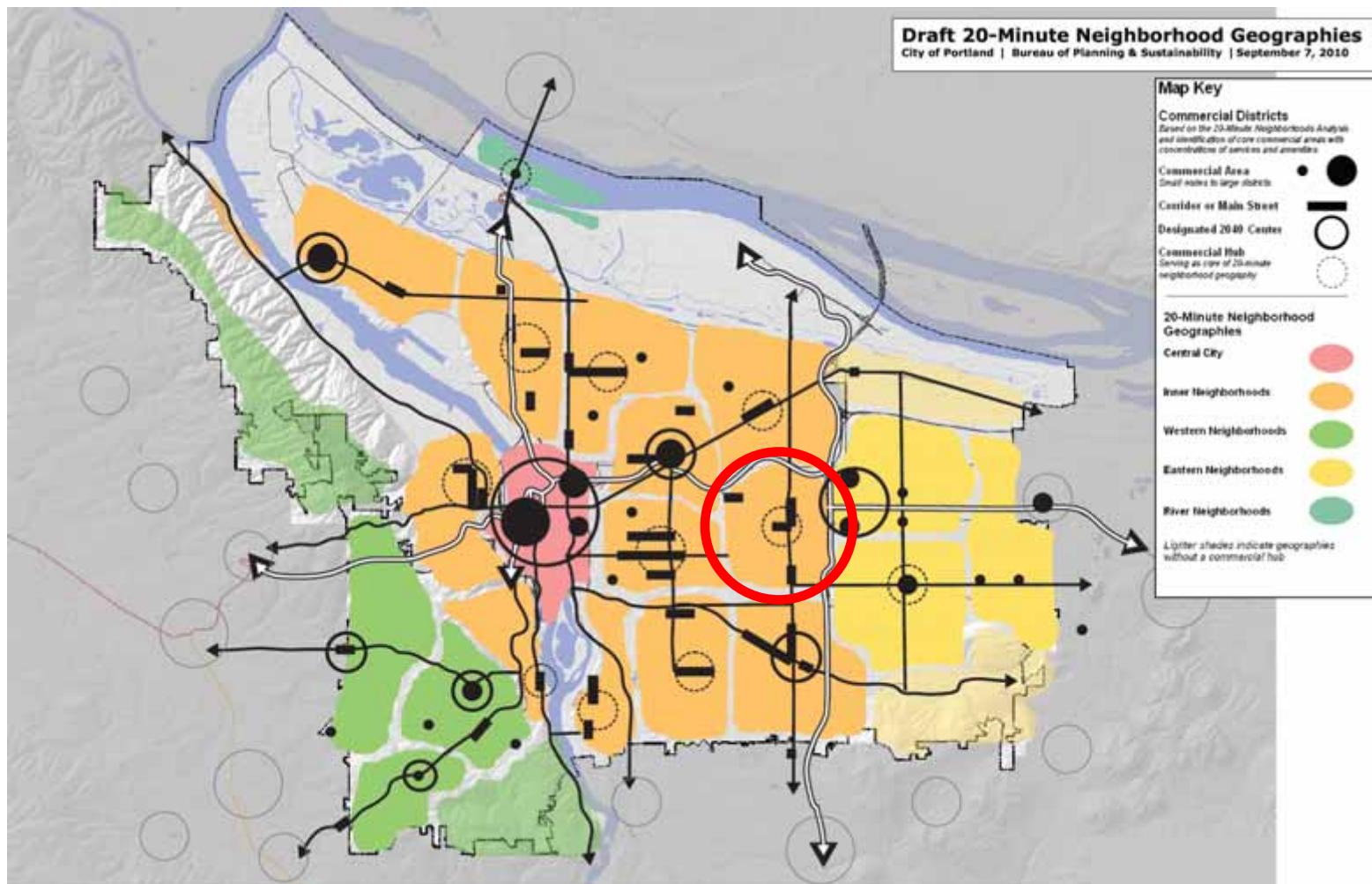
**Total Firms****Average Annual Wages**



## Montavilla Analysis Area

*Including Montavilla, Mt. Tabor, South Tabor, and parts of the North Tabor and Powellhurst-Gilbert neighborhoods*

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# Montavilla Analysis Area

## Services and Amenities

*Population: 31,600 people (13,300 households)  
Land Area: 4.4 square miles (7,200 people per sq. mile)*

### Commercial Districts

Primary concentrations of commercial districts include Montavilla's historic main street along Stark near 82<sup>nd</sup> Avenue, Glisan west of 82<sup>nd</sup> Avenue, and the area around Division and 82<sup>nd</sup> Avenue (which includes the Fubbon shopping center and numerous Asian businesses and is sometimes referred to as the "New Chinatown"). Smaller concentrations of neighborhood commercial services are also located elsewhere along 82<sup>nd</sup> Avenue.

**Grocery stores:** 4 (1 store per 3,325 households)

**Retail gap:** \$15 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	82%
Within 1/2 mile of a public elementary school:	40%
Within 3 miles of a full-service community center*:	100%
Within 1/2 mile of a full-service grocery store:	34%
Within 1/4 mile of a frequent service transit stop:	49%

\*Parks Bureau service standard

**Community Centers:** 1 (Montavilla Community Center and Pool)

**Libraries:** None

**Parks and Open Spaces:** 229 acres - including Mt. Tabor, Montavilla, Berrydale, and Harrison parks.

**Tree Canopy Coverage:** 22%

**Public Schools:** 1 high school (Franklin – at southwest edge of analysis area)

5 K-8 schools (Atkinson Elementary\*, Creative Science School K-8, Vestal K-8, Glencoe Elementary\*, Harrison Park K-8)

\*At edge of analysis area

**Colleges (campus):** 3 (Portland Community College – Southeast Campus, Warner Pacific University, Multnomah University – Bible College and Biblical Seminary)

**Hospitals:** None

**Farmers Markets:** 1 (Montavilla Farmers Market)

**Transit Centers/Stations:** 4 (60<sup>th</sup> Avenue, 82<sup>nd</sup> Avenue, SE Main, and SE Division light rail stations – all located at edges of analysis area)

**Walkable Access Score:** 63 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

## Neighborhood and Business Associations

**Neighborhood Associations:** Montavilla, Mt. Tabor, South Tabor, North Tabor, and Powellhurst-Gilbert

**Business Associations:** Montavilla/East Tabor and 82<sup>nd</sup> Avenue business associations

## Urban Form Characteristics

Most of the area has inner neighborhood characteristics, such as compact blocks with fully-improved streets and sidewalks, although its eastern edge (particularly its southeastern corner) includes eastern neighborhood characteristics, such as larger blocks and streets without sidewalks.

Commercial streets include 82<sup>nd</sup> Avenue, the area's most prominent street corridor with predominantly auto-oriented development, and some traditional main street areas with street-fronting buildings, particularly along Stark and Glisan streets. Mt. Tabor is the most prominent topographical feature in the area, which is bordered to the north and east by the I-84 and I-205 freeways.

**Access issues.** Most of the area has good street and sidewalk connectivity. An exception are portions of the area east of 82<sup>nd</sup> Avenue, particularly around Powell Boulevard. Fairly good access to transit and to commercial and community services. Freeways act as barriers to adjacent areas toward the north and east.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	3.3 miles (82 <sup>nd</sup> Ave., Glisan, Division)
Station Communities:	4

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,077	53%	144
Multi-Family Residential:	513	25%	171
Commercial/Mixed-Use:	223	11%	134
Employment:	3	.1%	0
Industrial:	0	0%	0
Open Space:	319	11%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

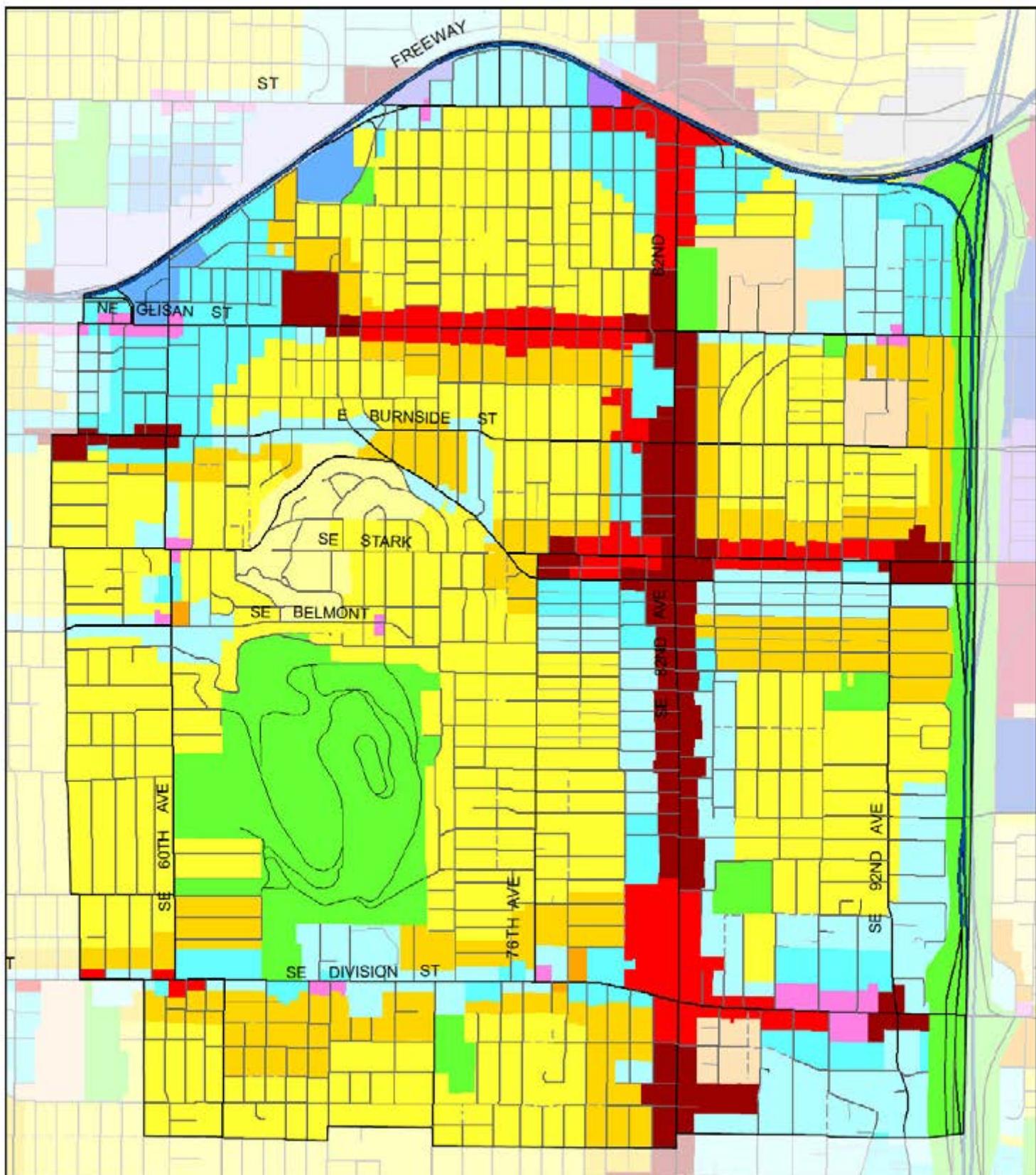
2010 Housing Units (Census):	14,033
2035 Housing Units:	19,500

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Montavilla Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000

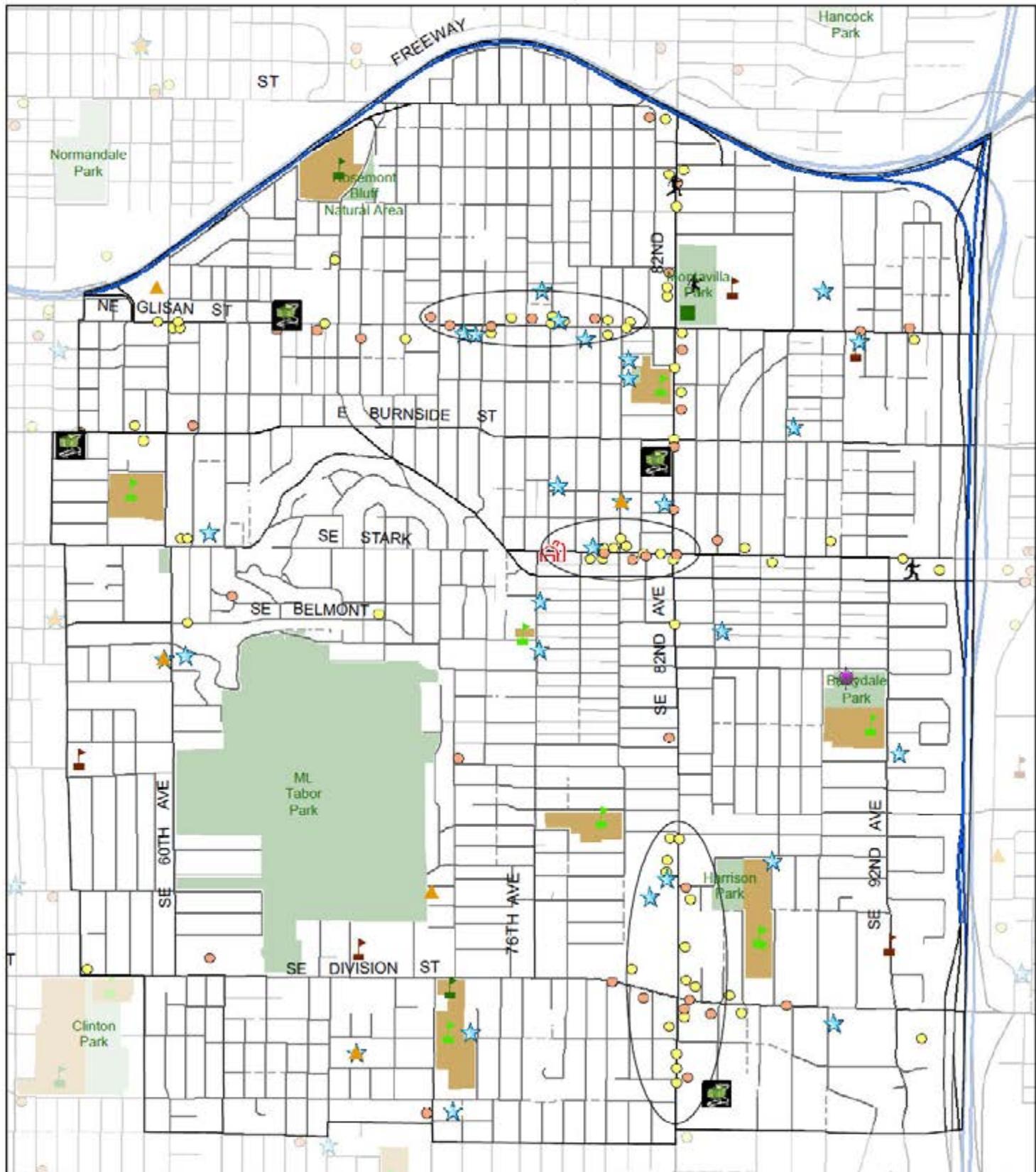


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City of Portland, Oregon  
Sam Adams, Mayor - Jenny Anderson, Director

# Montavilla Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Preschools
- Daycare Centers
- Farmers Markets
- Community Gardens
- Community Centers
- Public HS
- Public K-8
- Private Schools
- County Health Clinic
- County Aging Services



0 1,000 2,000 3,000 Feet

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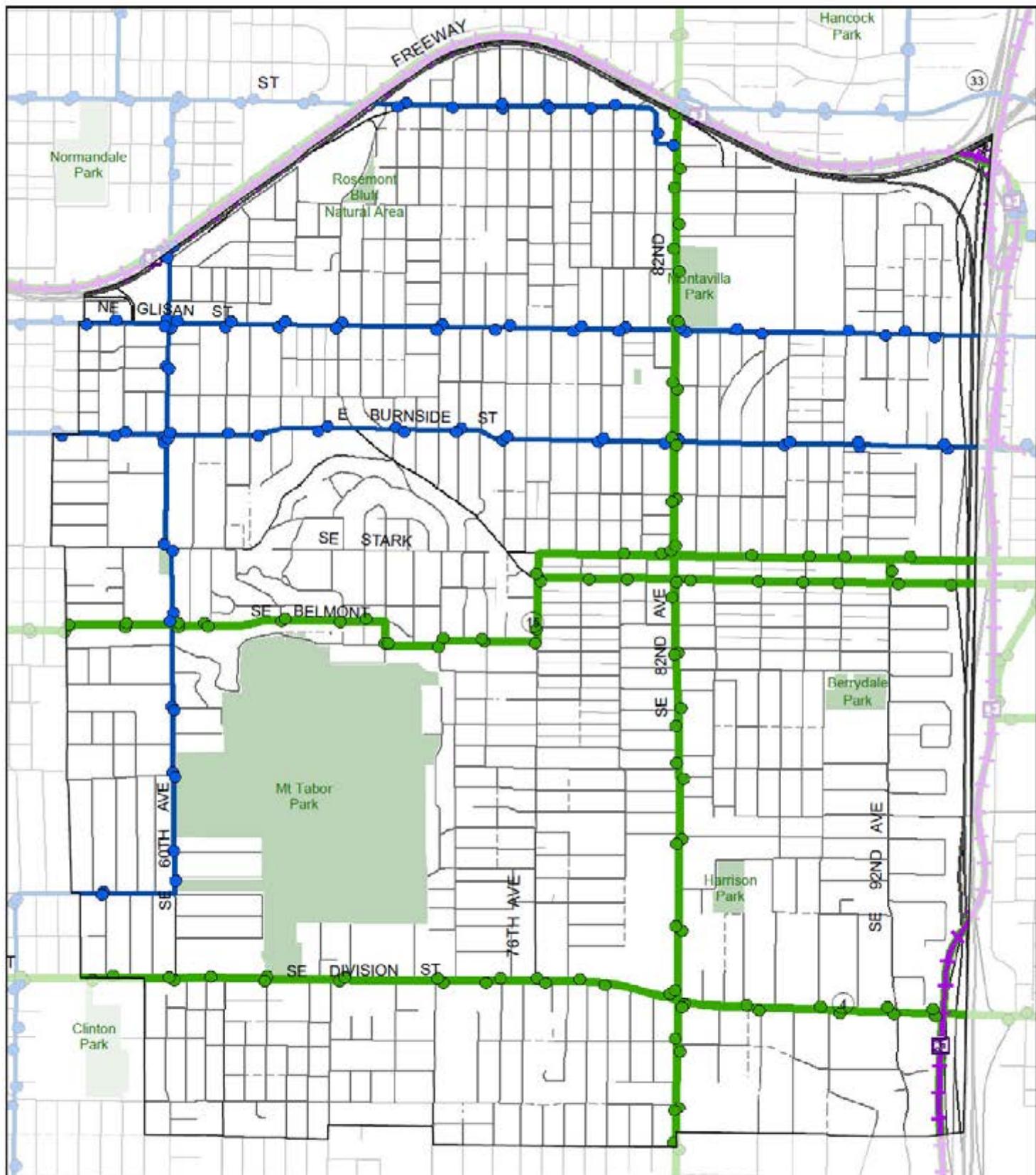


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Tom Adams, Mayor - Jason Averette, Director

# Montavilla Analysis Area



## Transit Infrastructure

February 1, 2012

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Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX	Rush Hour Stops
Streetcar	

MAX	Standard Service	Frequent Service
MAX	Standard Service	
Streetcar		Rush Hour Only Service
Streetcar		

— City Boundary



1,000 2,000 3,000 Feet

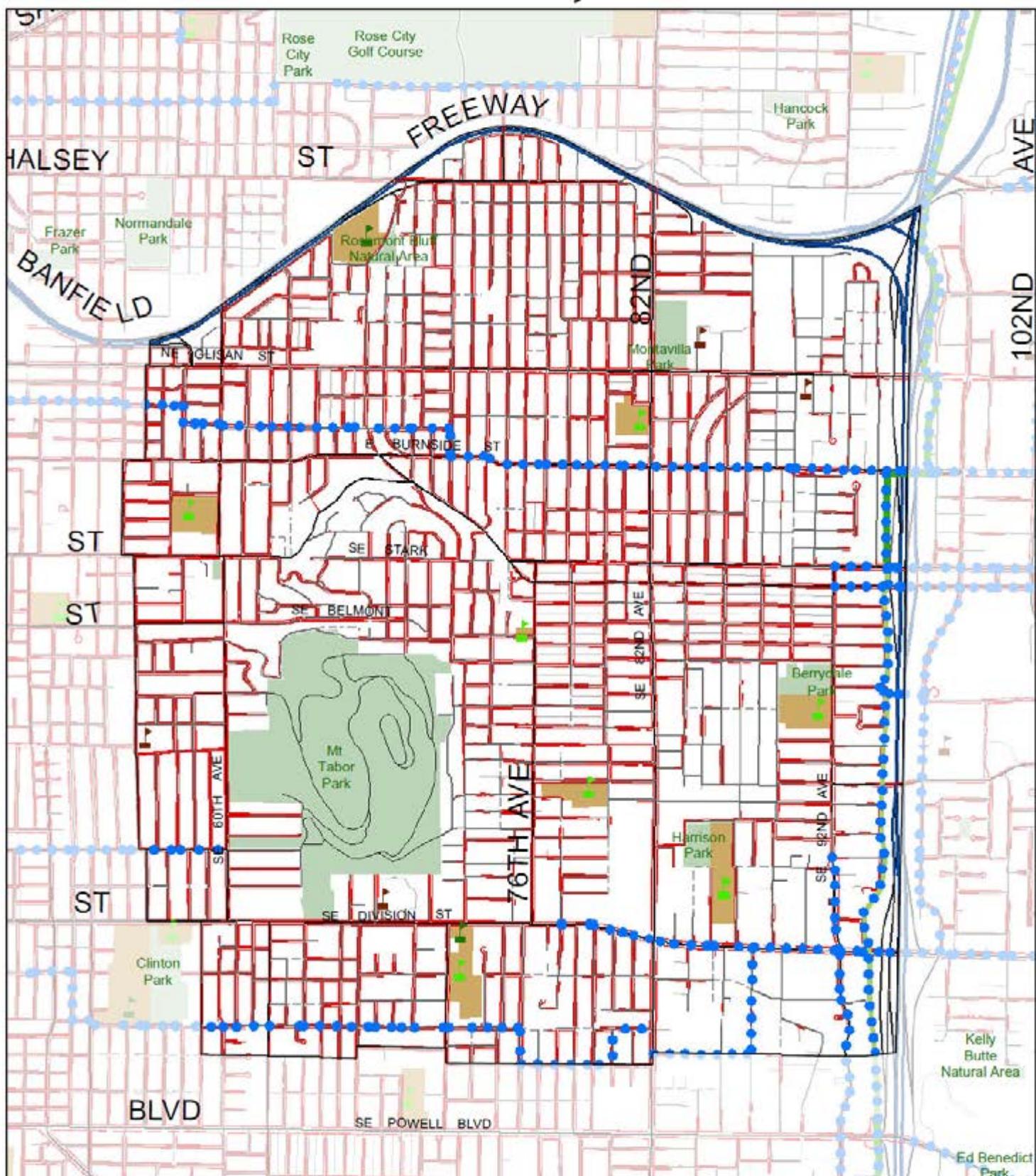


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John Adams, Mayor • Jason Anderson, Director

# Montavilla Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

G:\mayor\\_Office\20\_min\_eho\_profiles\sidewalks\_Banfield

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000  
Feet

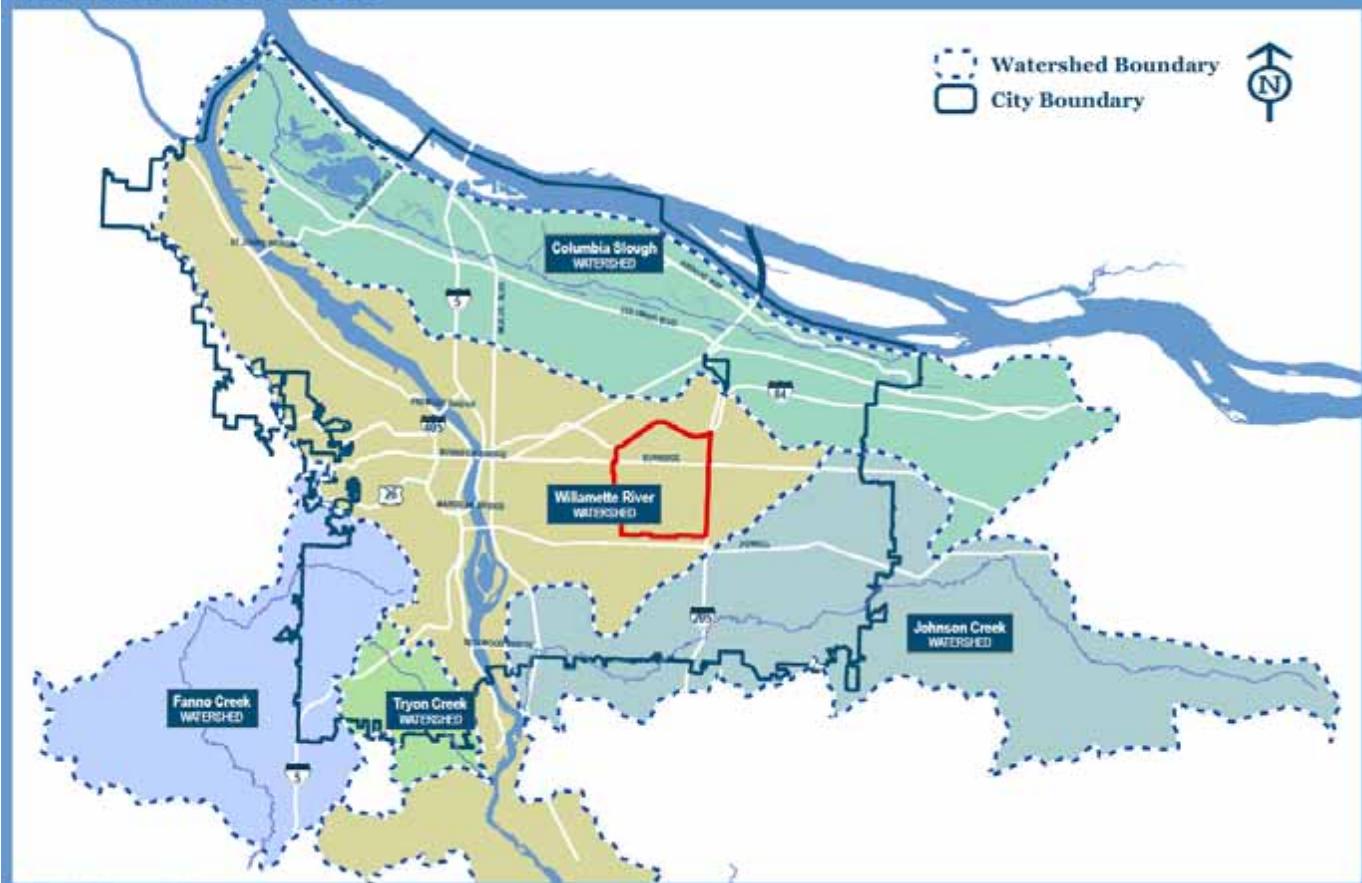


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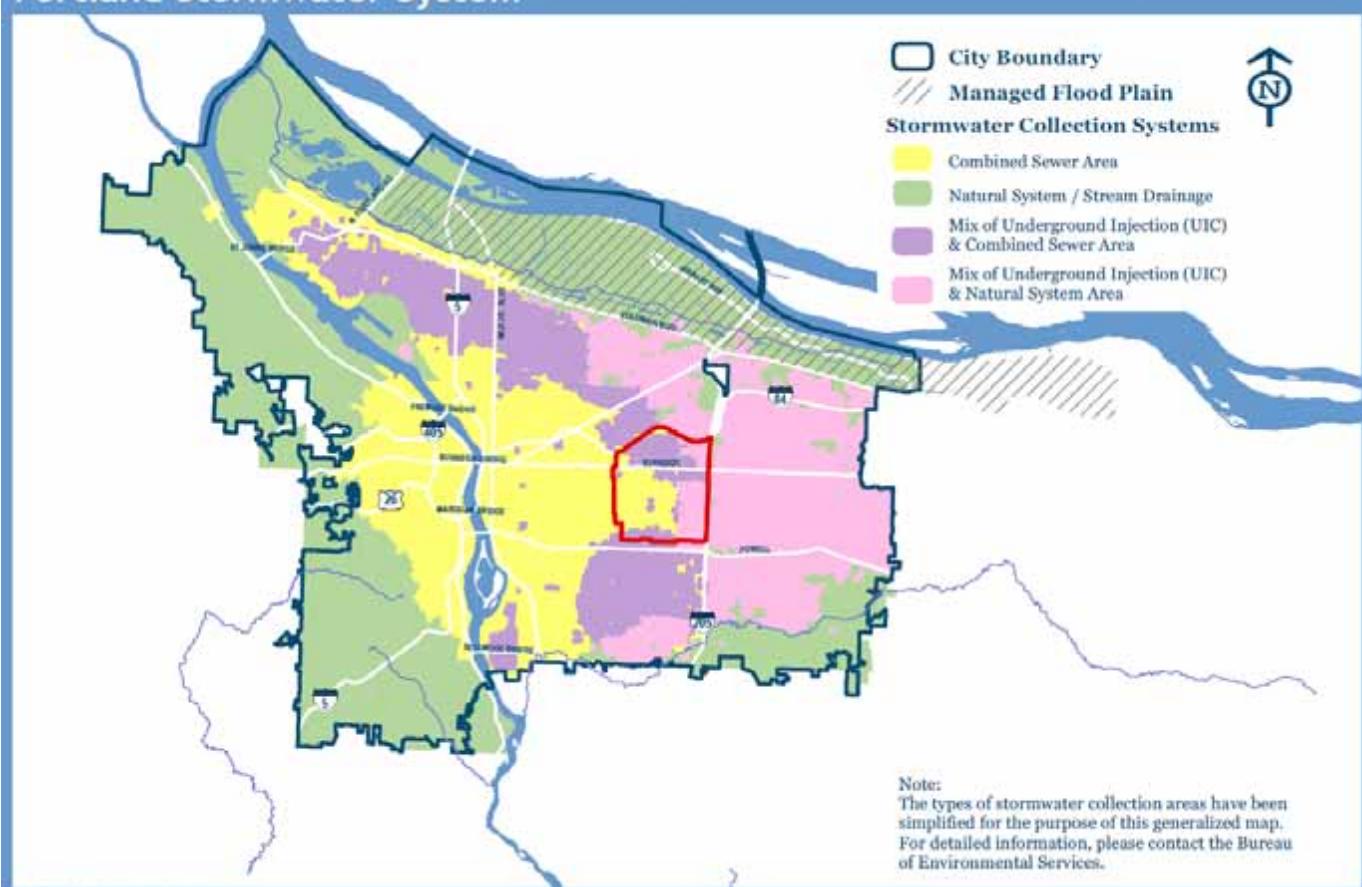


City of Portland Oregon  
Sam Adams, Mayor - Susie Anderton, Director

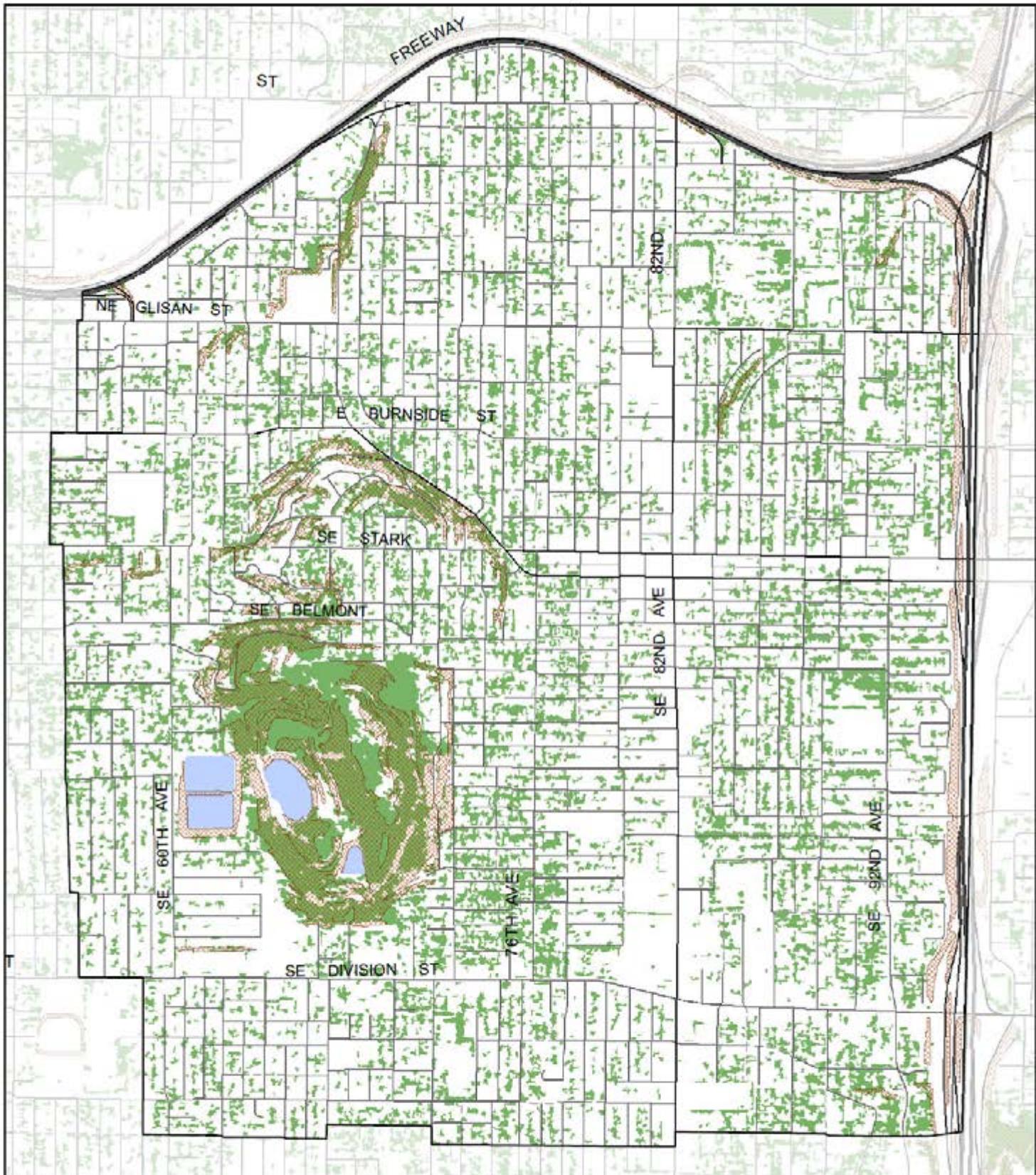
## Portland Watersheds



## Portland Stormwater System



# Montavilla Analysis Area



## Watersheds and Natural Features

- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



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City of Portland, Oregon  
Sam Adams, Mayor • Naren Anderson, Director

August 9, 2011

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City of Portland Bureau of Planning and Sustainability

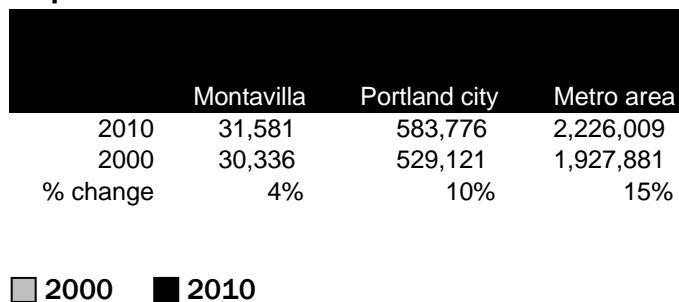
9-9

# Montavilla Analysis Area

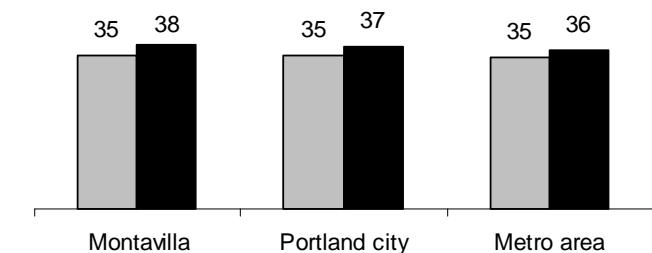
## Demographics (2000 – 2010)

ESRI Business Analyst and US Census 2010 (except as noted)

### Population



### Median Age

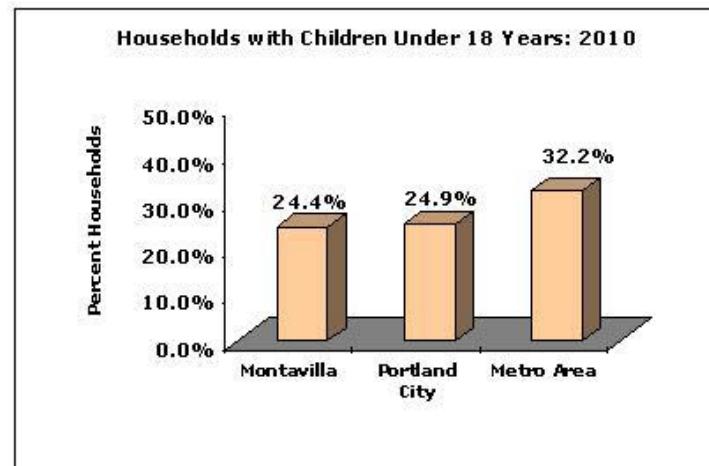
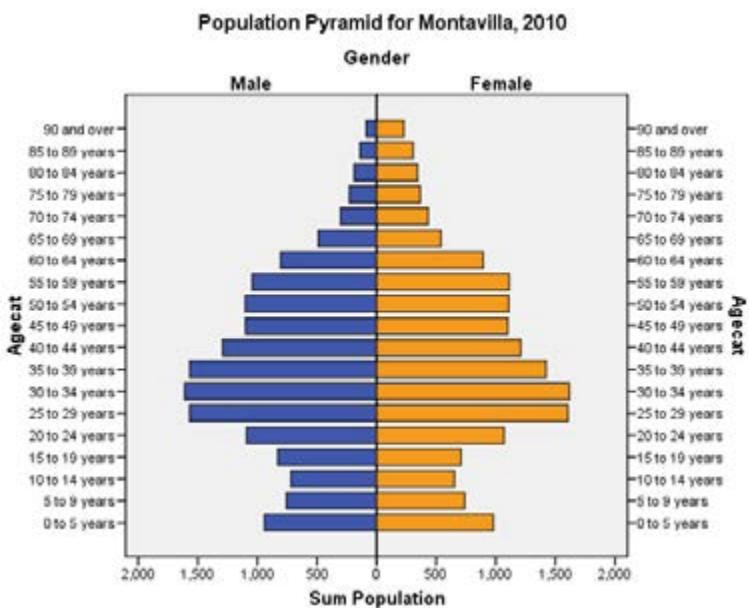
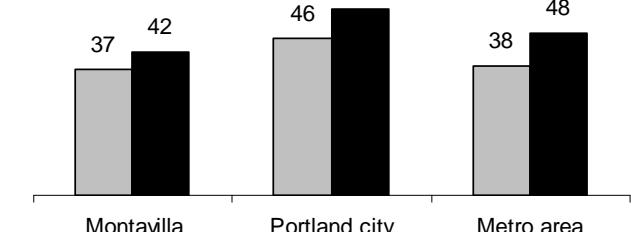


### Average Household Size

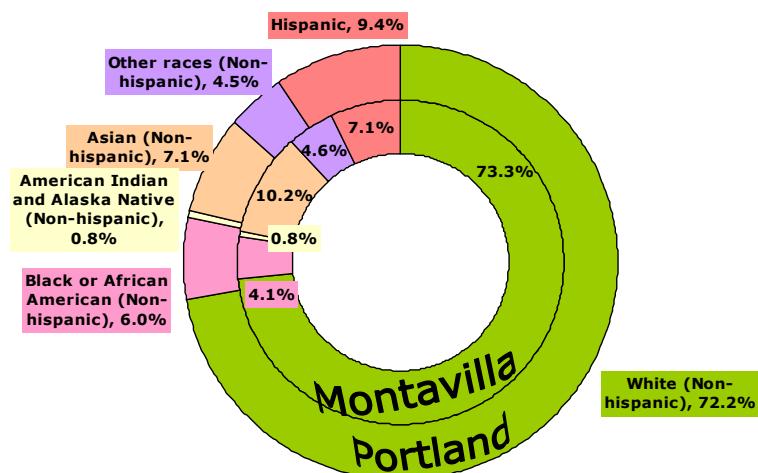


### Diversity Index

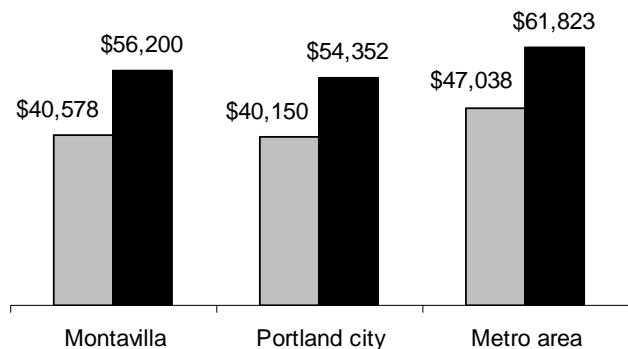
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



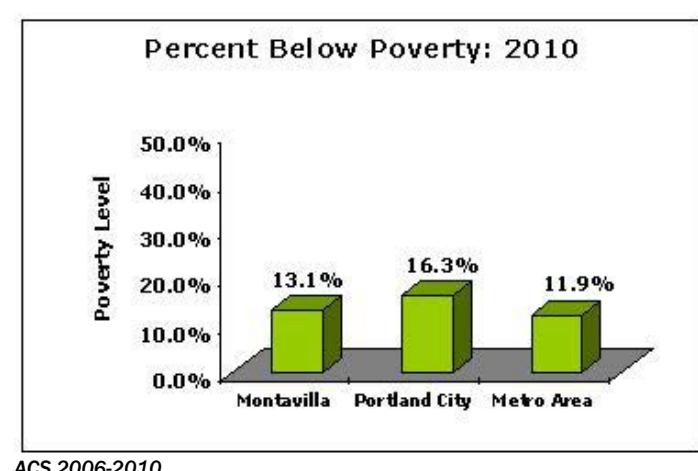
### Racial and Ethnic Distribution in Portland vs. Montavilla



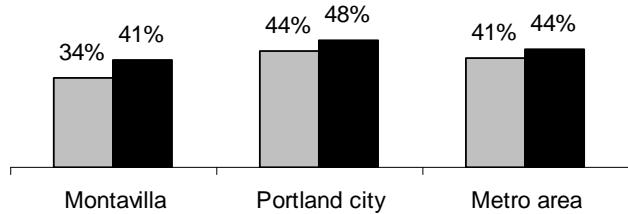
## Median Household Income



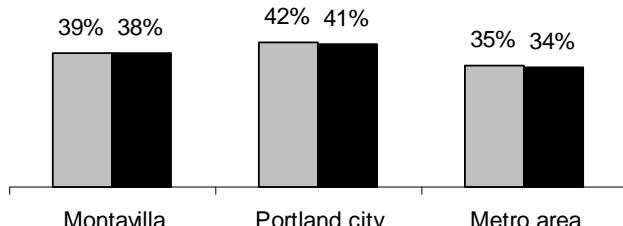
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Montavilla	Portland city	Metro area
2010	\$226,609	\$253,184	\$273,500
2000	\$141,422	\$154,721	\$168,347
% change	60.2%	63.6%	62.5%

## Montavilla Analysis Area

### Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

#### RETAIL

##### Square Feet

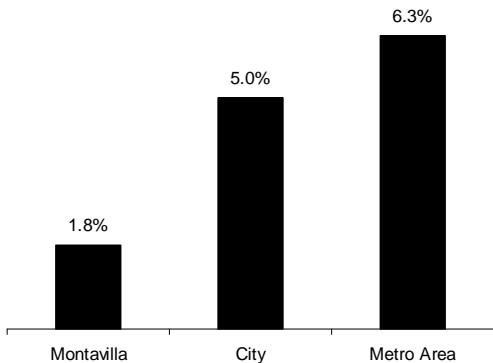
Montavilla	City	Metro Area
3,448,216	51,937,895	107,875,146

#### OFFICE SPACE

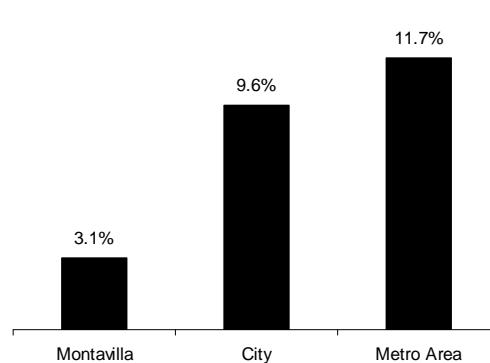
##### Square Feet

Montavilla	City	Metro Area
2,375,801	54,348,765	92,465,455

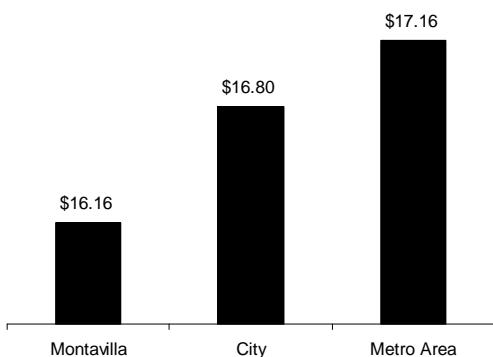
##### Retail Vacancy



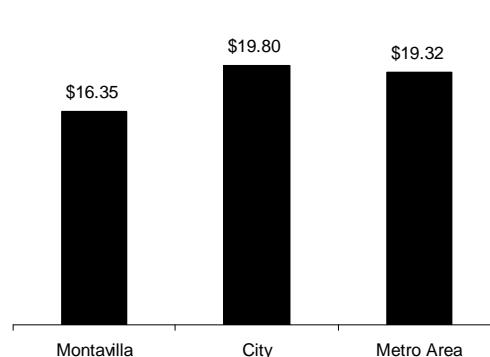
##### Office Vacancy



##### Retail Rents



##### Office Rents



# Montavilla Analysis Area

## Retail Market Profile

**Retail Gap = \$15 million**

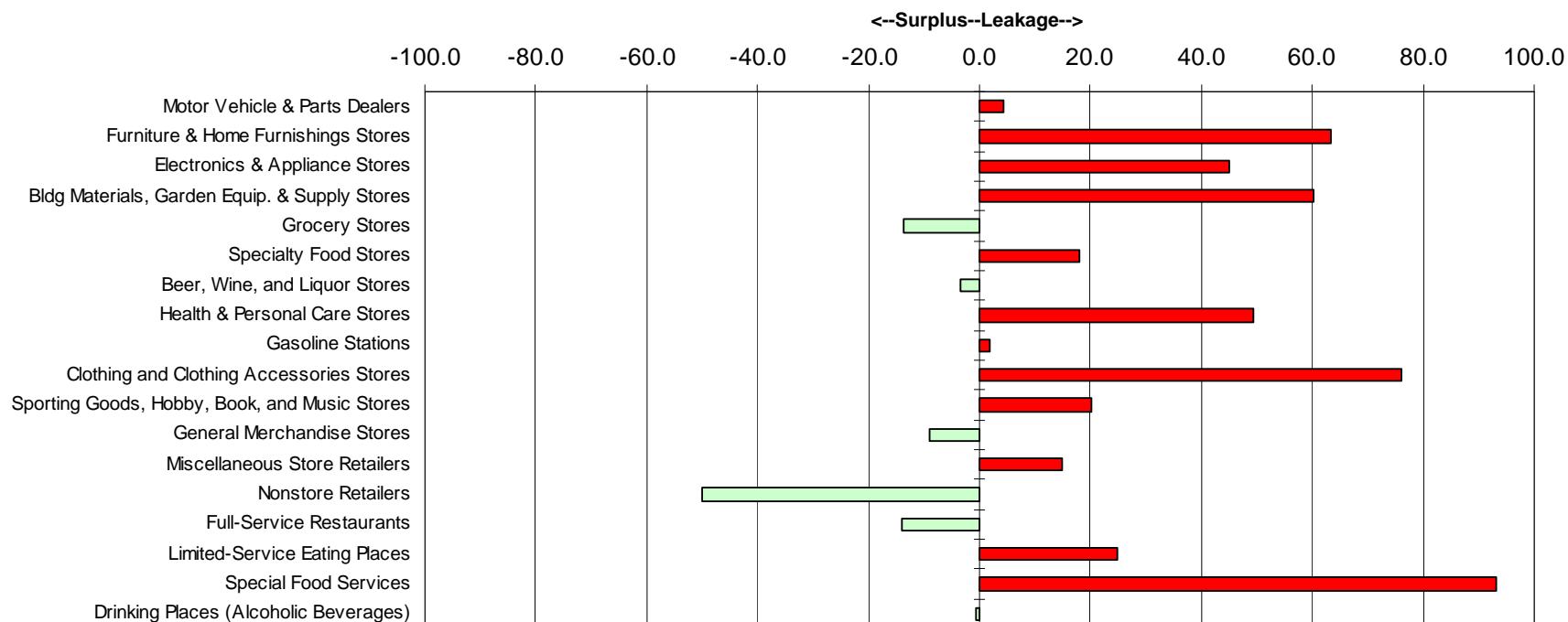
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$307,027,091	\$291,870,690	\$15,156,401	2.5	255
Total Retail Trade (NAICS 44-45)	\$261,905,097	\$255,650,875	\$6,254,222	1.2	174
Total Food & Drink (NAICS 722)	\$45,121,994	\$36,219,815	\$8,902,179	10.9	81

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Montavilla Analysis Area

## Employment

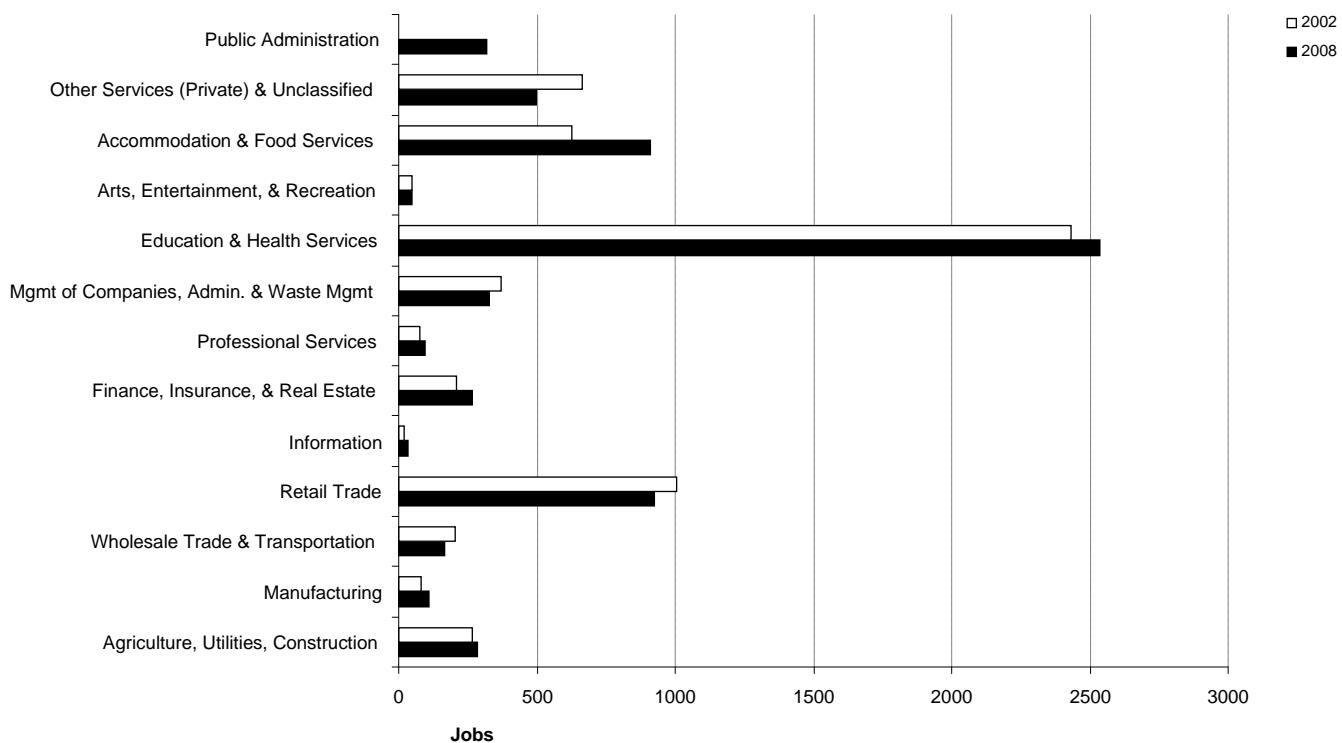
Quarterly Census of Employment and Wages data for 2002 & 2008  
 Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

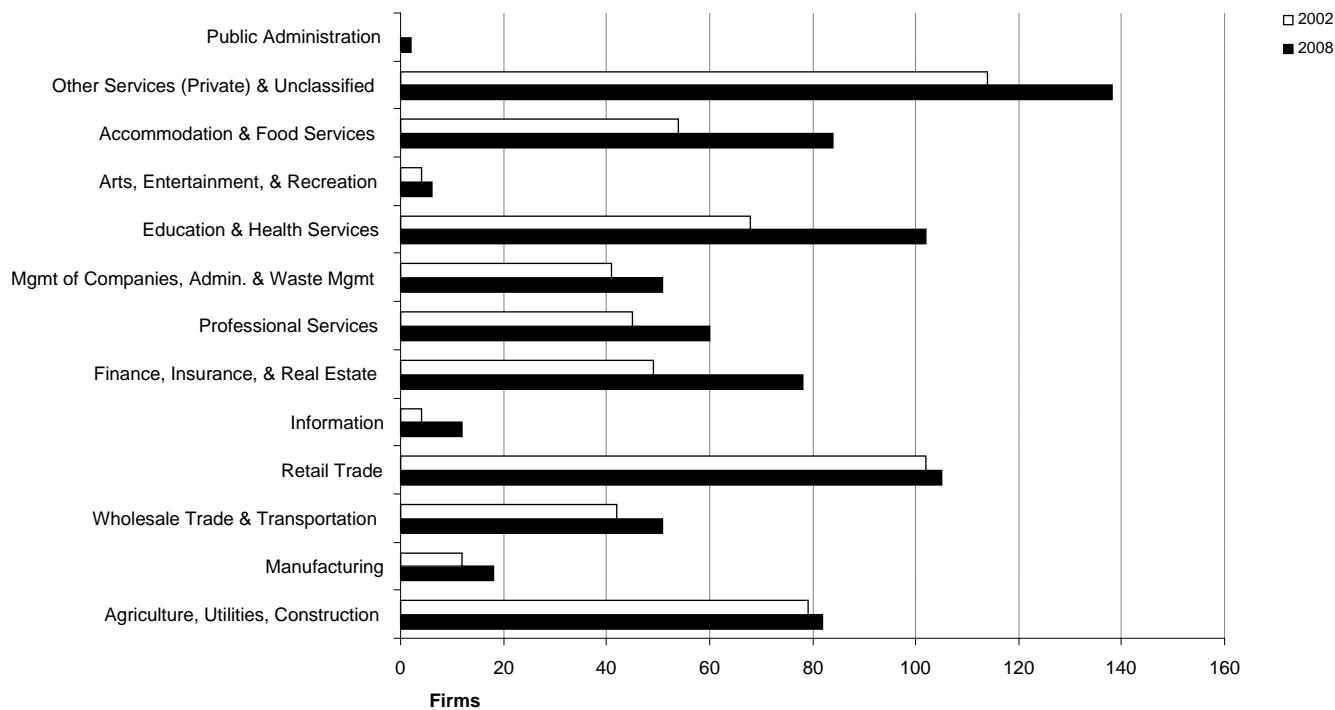
*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	6,000	6,506	+506
Total Firms	614	789	+175
Average Annual Wages	\$22,191	\$28,995	+6,804

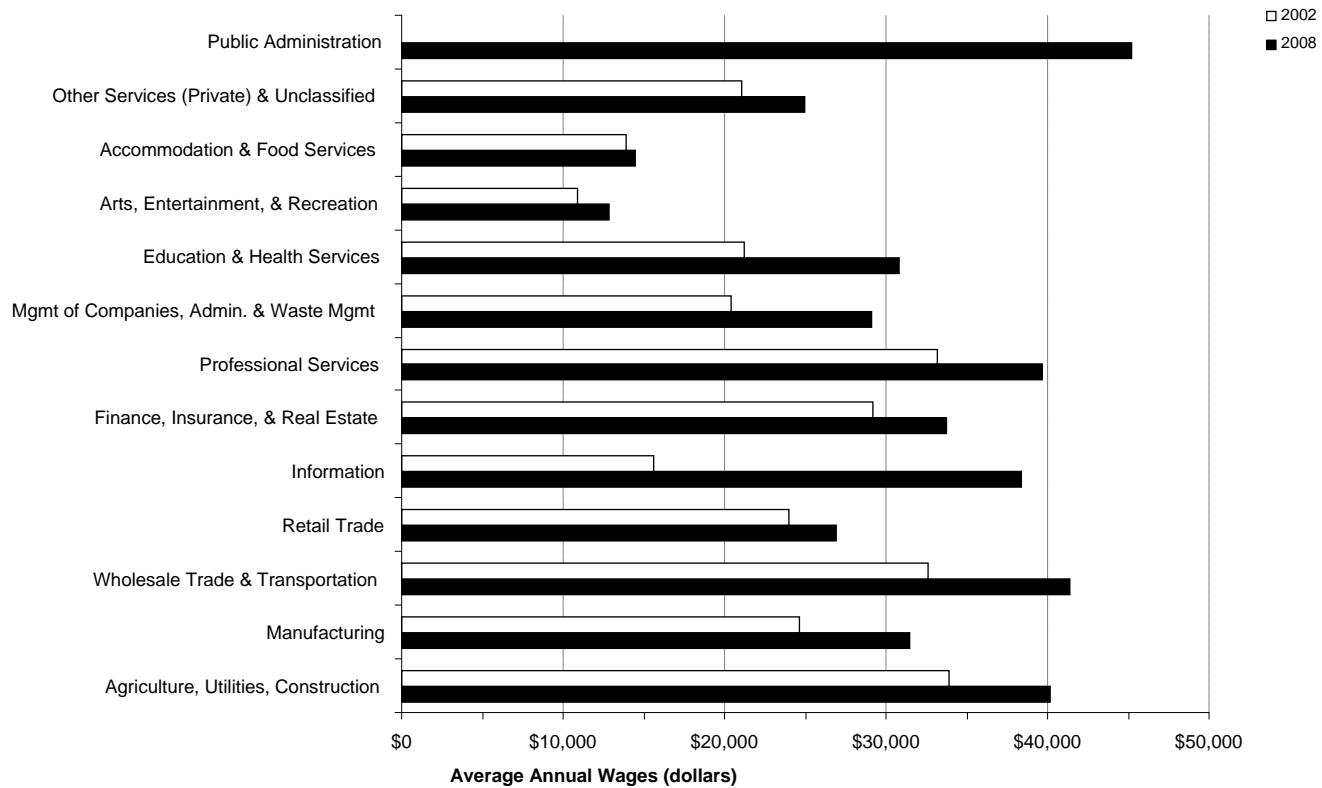
### Total Jobs



## Total Firms



## Average Annual Wages

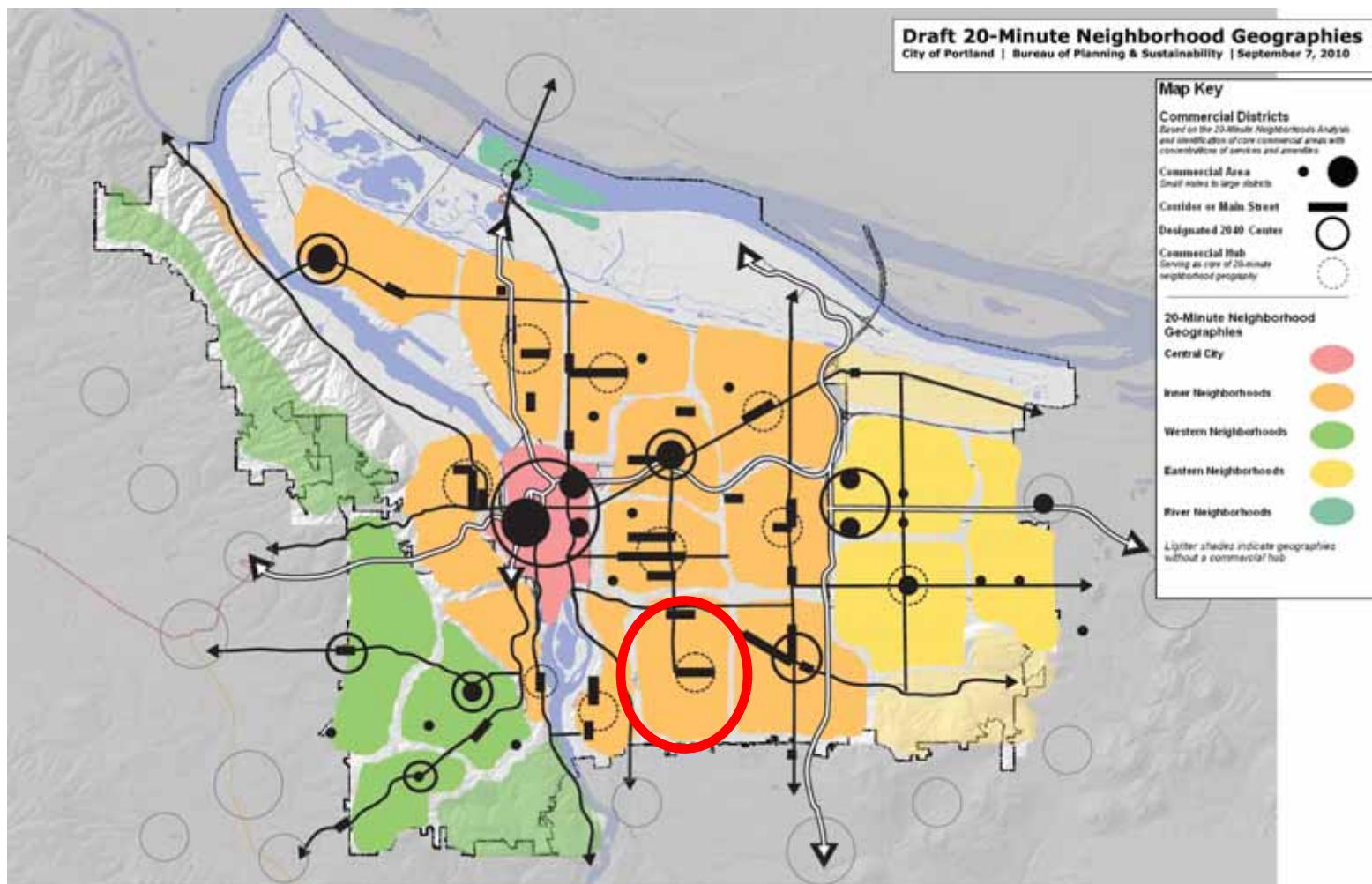




## Woodstock Analysis Area

*Including Woodstock, Eastmoreland, Reed, Creston-Kenilworth, and parts of the Brentwood-Darlington neighborhoods*

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# Woodstock Analysis Area

## Services and Amenities

*Population: 31,300 people (13,200 households)  
Land Area: 4.6 square miles (6,700 people per sq. mile)*

### Commercial Districts

The area's largest concentration of commercial services is located along SE Woodstock. There are also concentrations of commercial services at the area's northern edge along SE Powell and on SE Foster.

**Grocery stores:** 4 (1 store per 3,300 households)

**Retail gap:** \$136 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	100%
Within 1/2 mile of a public elementary school:	51%
Within 3 miles of a full-service community center*:	96%
Within 1/2 mile of a full-service grocery store:	46%
Within 1/4 mile of a frequent service transit stop:	40%

\*Parks Bureau service standard

**Community Centers:** 1 (Woodstock Community Center – no recreation facilities)

**Libraries:** 1 (Woodstock Library)

**Parks and Open Spaces:** 233 acres – including Crystal Springs Rhododendron Garden, Eastmoreland Golf Course, Tideman Johnson Natural Area, and Creston, Kenilworth, Berkeley and Woodstock parks.

**Tree Canopy Coverage:** 25%

**Public Schools:** 1 high school (Cleveland\*)

6 K-8 schools (Duniway, Grout, Lewis and Woodstock elementary schools, Creston K-8, Lane Middle School\*)

\*At edge of analysis area

**Colleges** (campus): 1 (Reed College)

**Hospitals:** None

**Farmers Markets:** 1 (Woodstock Farmers Market)

**Transit Centers/Stations:** None

**Walkable Access Score:** 61 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Woodstock, Eastmoreland, Reed, Creston-Kenilworth, and parts of Brentwood-Darlington

**Business Associations:** Woodstock Community, Greater Brooklyn, and Foster Area business associations

## Urban Form Characteristics

The majority of the area has inner neighborhood characteristics, such as compact blocks with fully-improved streets and sidewalks, but a substantial minority of streets in the southeastern portion of the area lack sidewalks or are not fully improved. Woodstock Boulevard is the area's primary commercial main street and features a mix of street-fronting buildings and more auto-oriented development with surface parking lots, while the major street corridors of Powell and Foster border the area's northern edge and McLoughlin Boulevard and railroad tracks define its western edge. Prominent natural features include Reed Canyon and Crystal Springs toward the west and Johnson Creek and hilly topography to the south.

**Access issues.** Most of the area has good street and sidewalk connectivity, except for the southeastern portion of the area. The area includes frequent transit service and commercial and community services, but these are beyond walking distance for a large portion of residents. McLoughlin Boulevard, railroad tracks, a golf course and other open spaces limit access to adjacent areas to the west.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	1.4 miles (Woodstock, parts of Powell and Foster)
Station Communities:	2 planned (along Portland-Milwaukie light rail line)

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,489	67%	212
Multi-Family Residential:	292	13%	147
Commercial/Mixed-Use:	135	6%	63
Employment:	4	.2%	1
Industrial:	96	4%	2
Open Space:	209	9%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

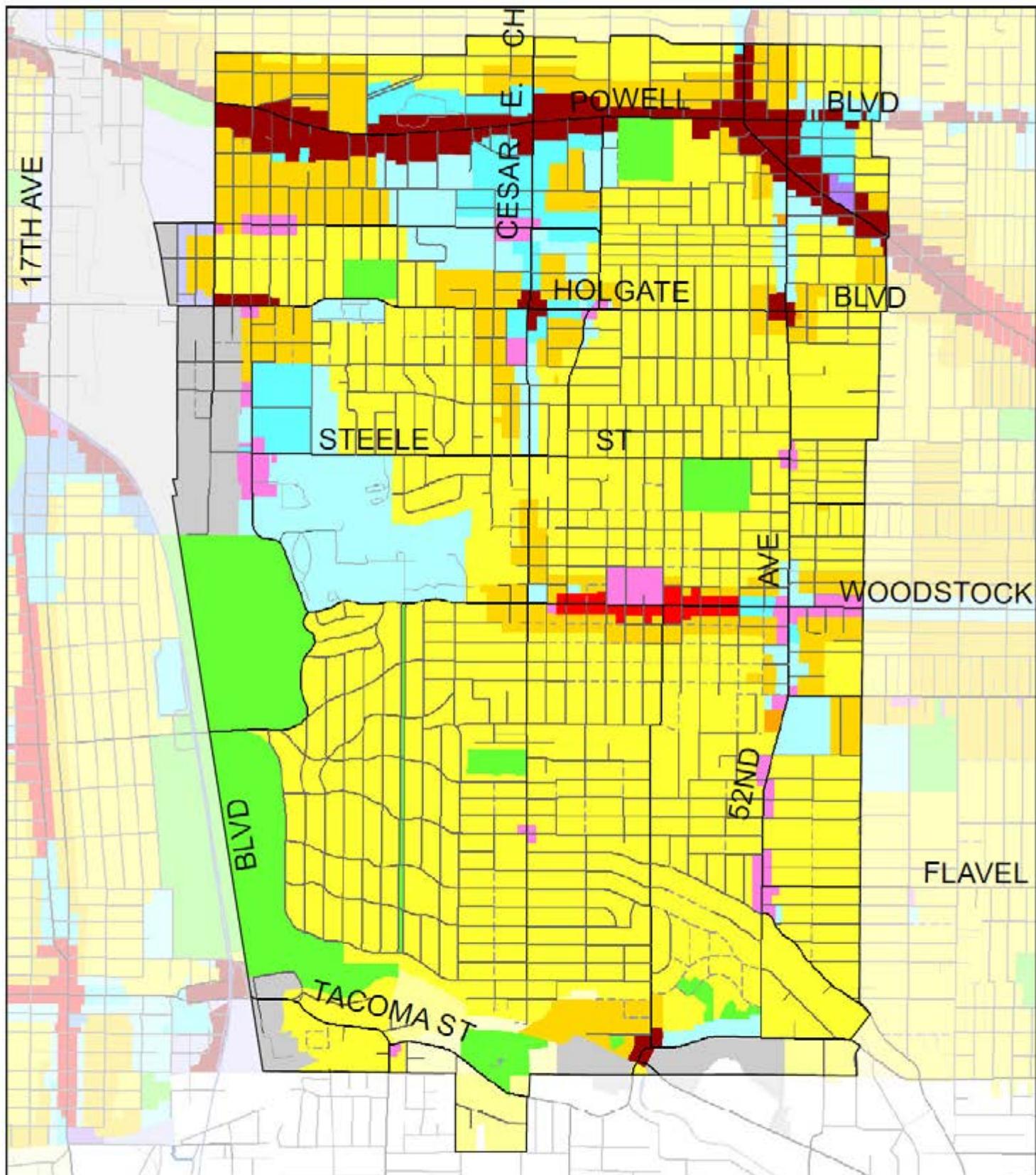
2010 Housing Units (Census):	13,761
2035 Housing Units:	16,300

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Woodstock Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000 Feet

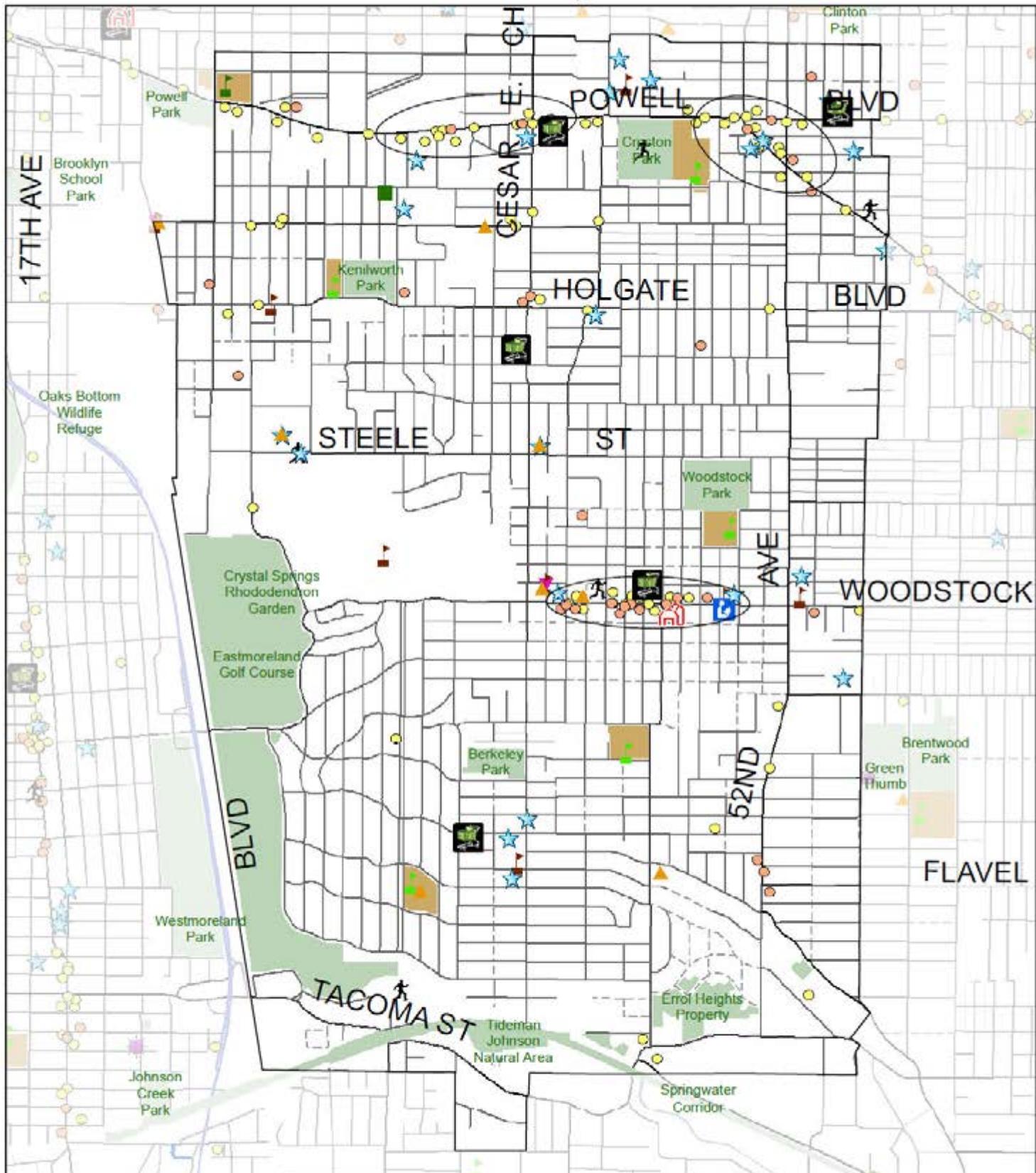


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Sam Adams, Mayor • Jason Anderson, Director

# Woodstock Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

**City of Portland Bureau of Planning and Sustainability**

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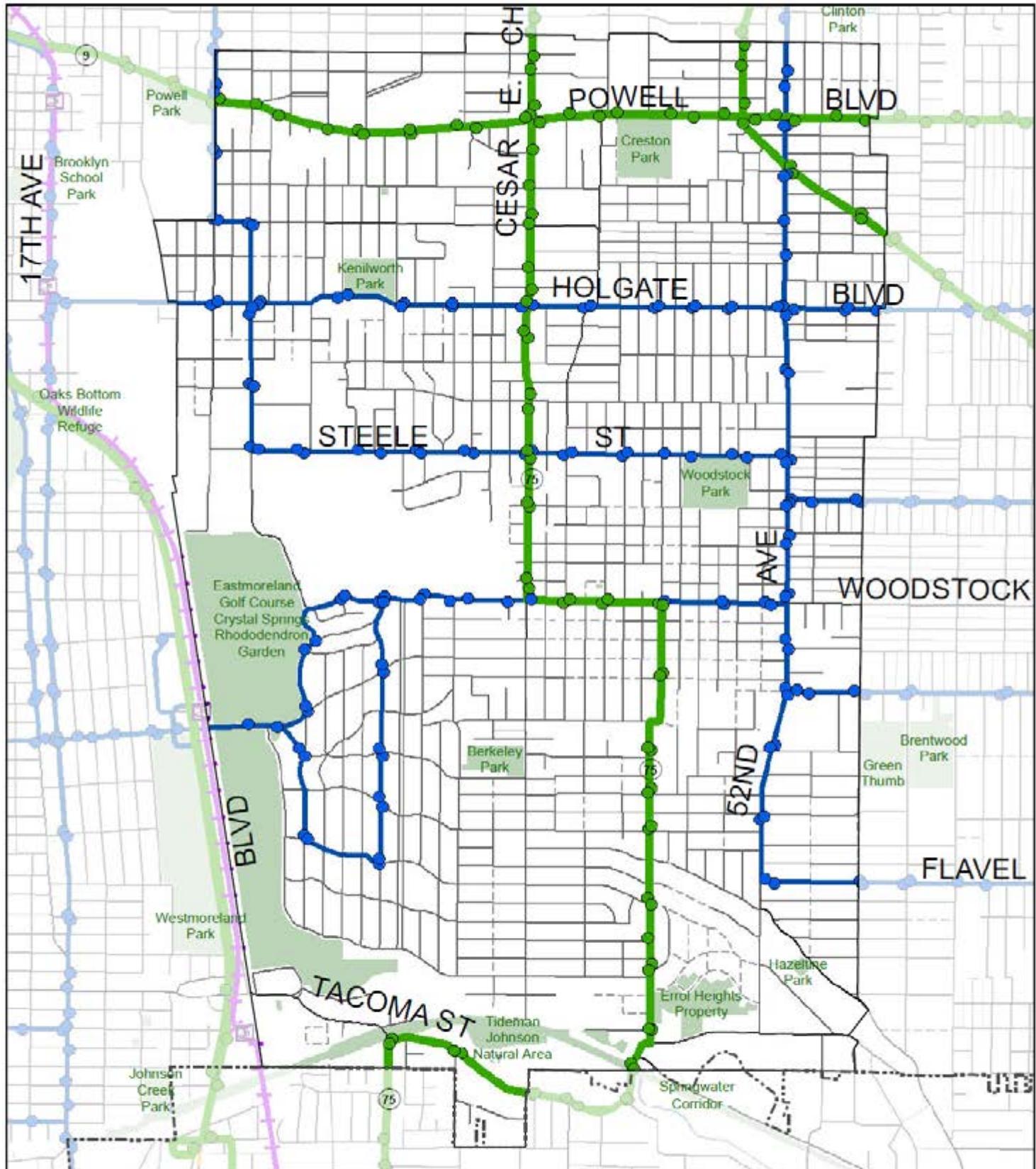
City of Portland Oregon  
Sam Adams Mayor • Stacie Anderson Director



0 1,000 2,000 3,000  
Feet

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Preschools
- Daycare Centers
- Farmers Markets
- Community Gardens
- Community Centers
- Public HS
- Public K-8
- Private Schools
- County Health Clinic
- County Aging Services

# Woodstock Analysis Area



## Transit Infrastructure

February 1, 2012

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Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX	Rush Hour Stops
Streetcar	

**Service Types:**

- Standard Service (Blue line)
- Rush Hour Only Service (Yellow line)
- City Boundary (Dashed line)



0 1,000 2,000 3,000  
Feet

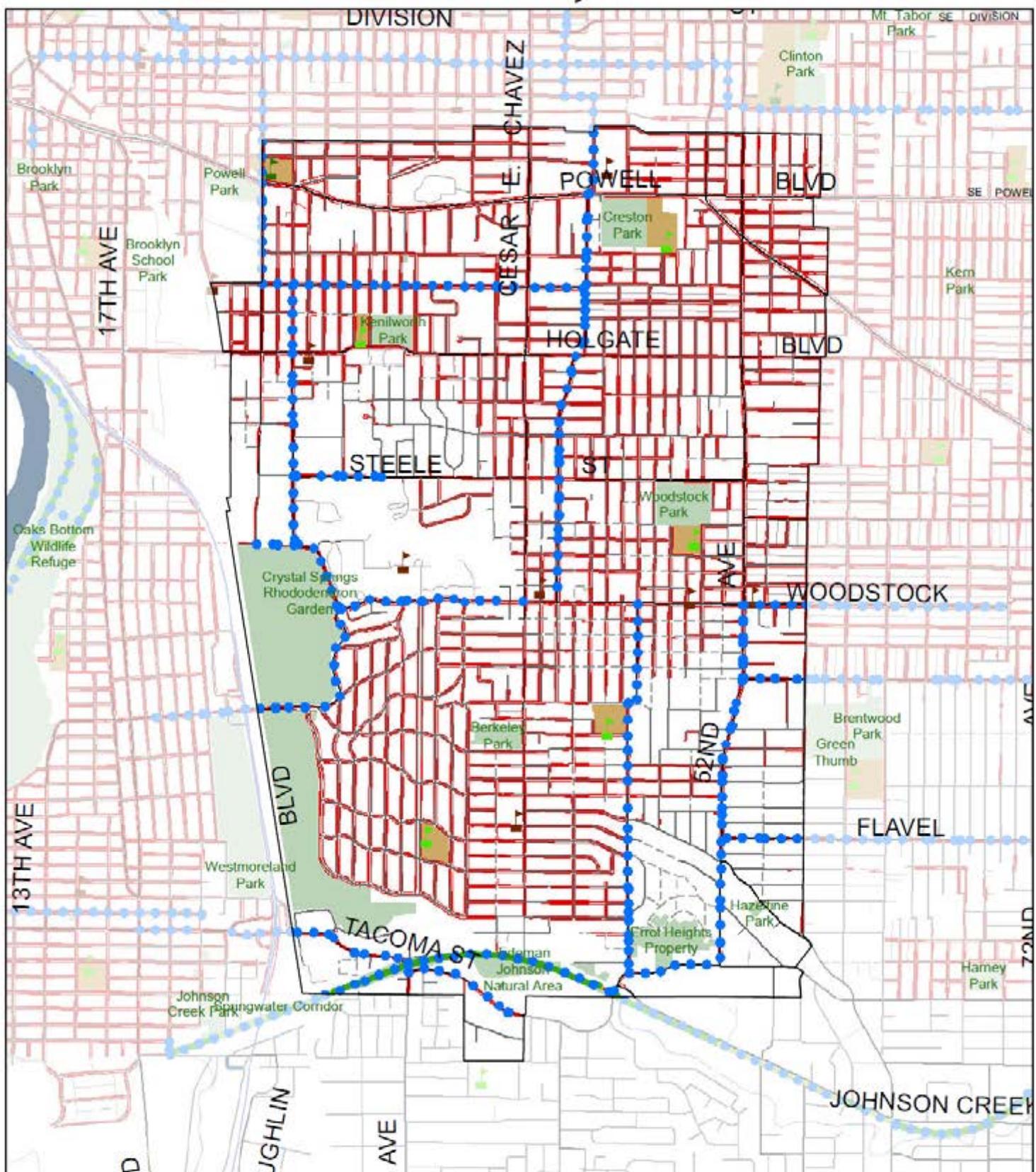


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# Woodstock Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet

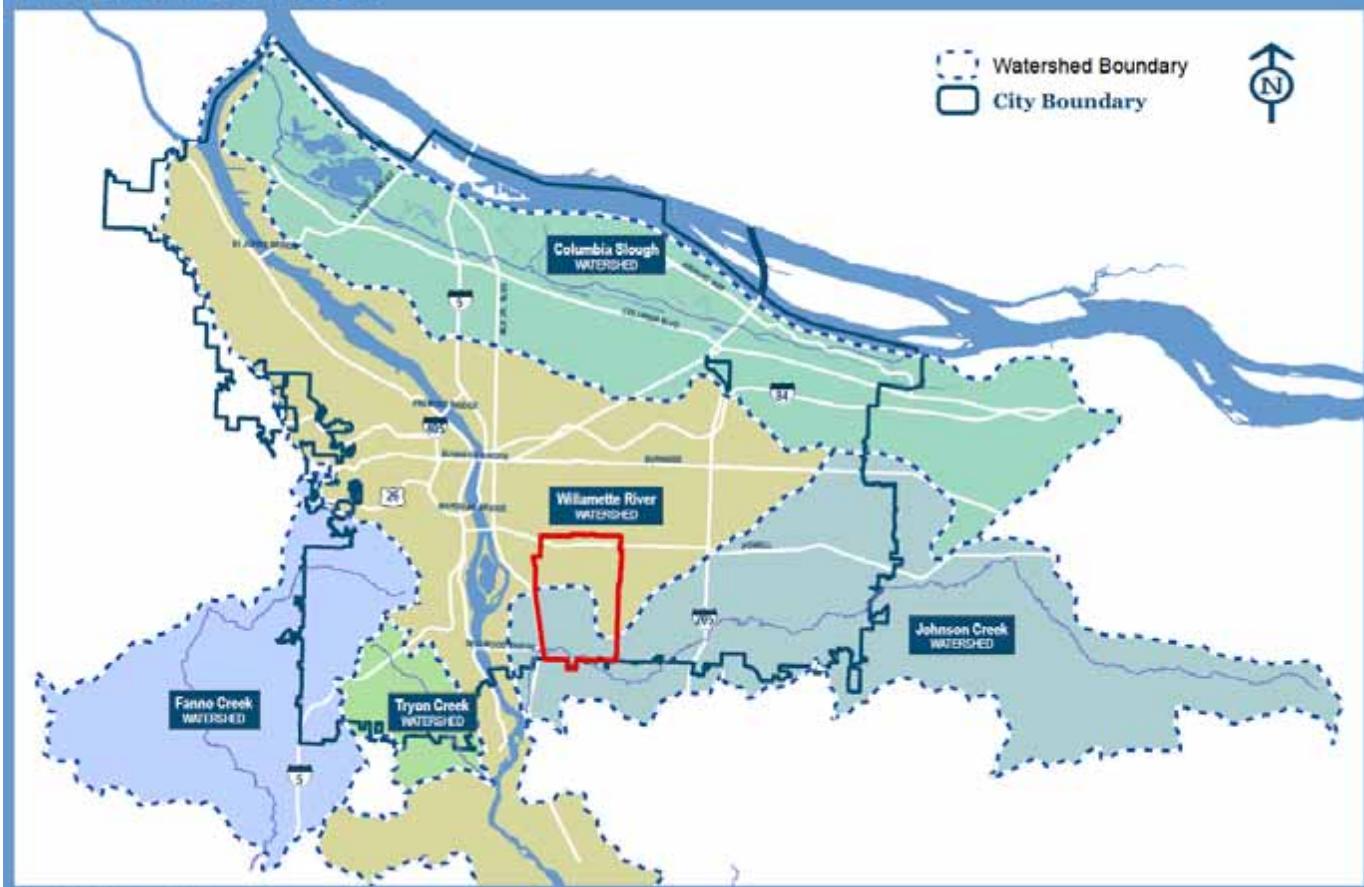


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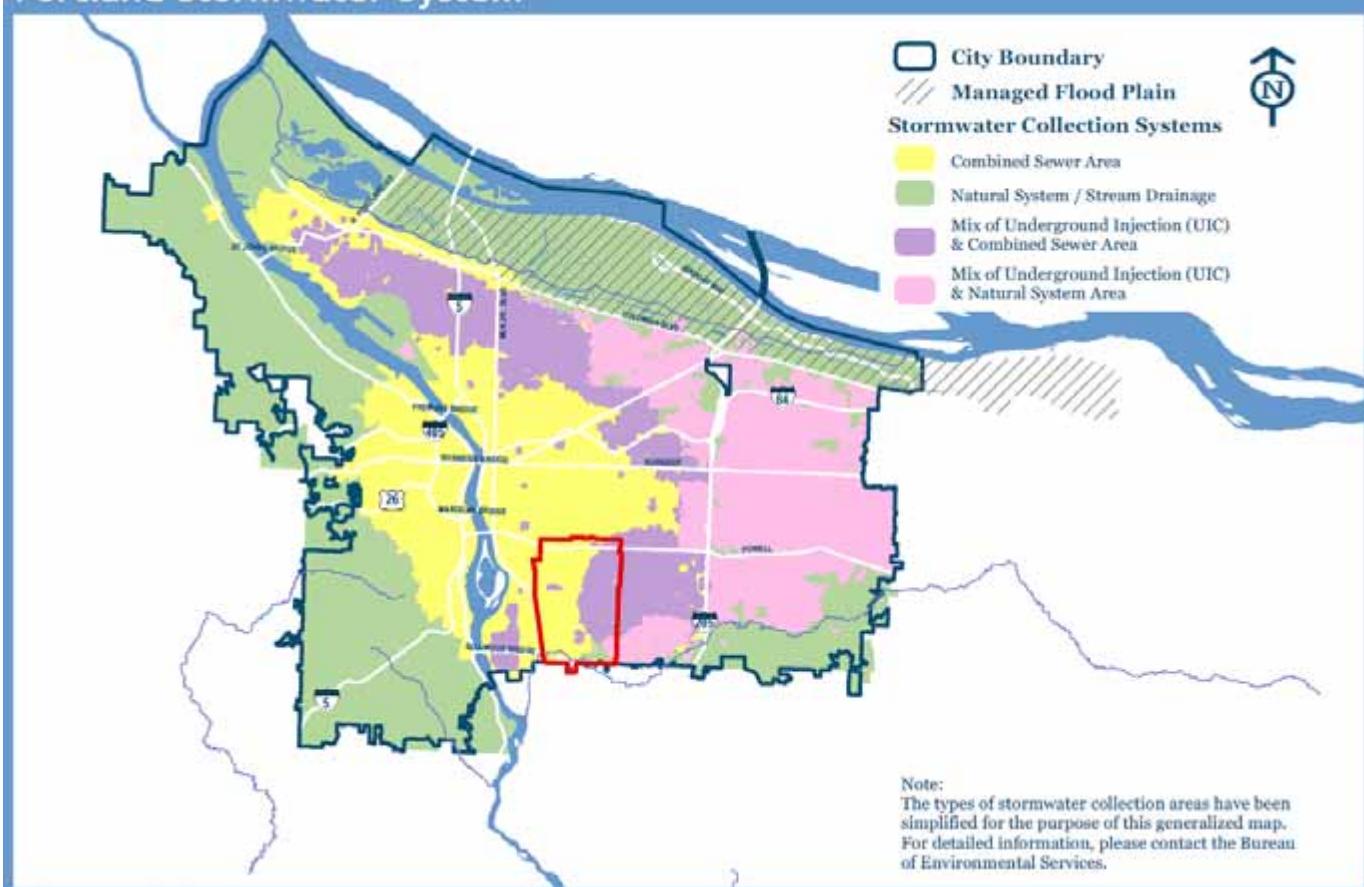


City of Portland, Oregon  
Tom Adams, Mayor • Susan Anderson, Director

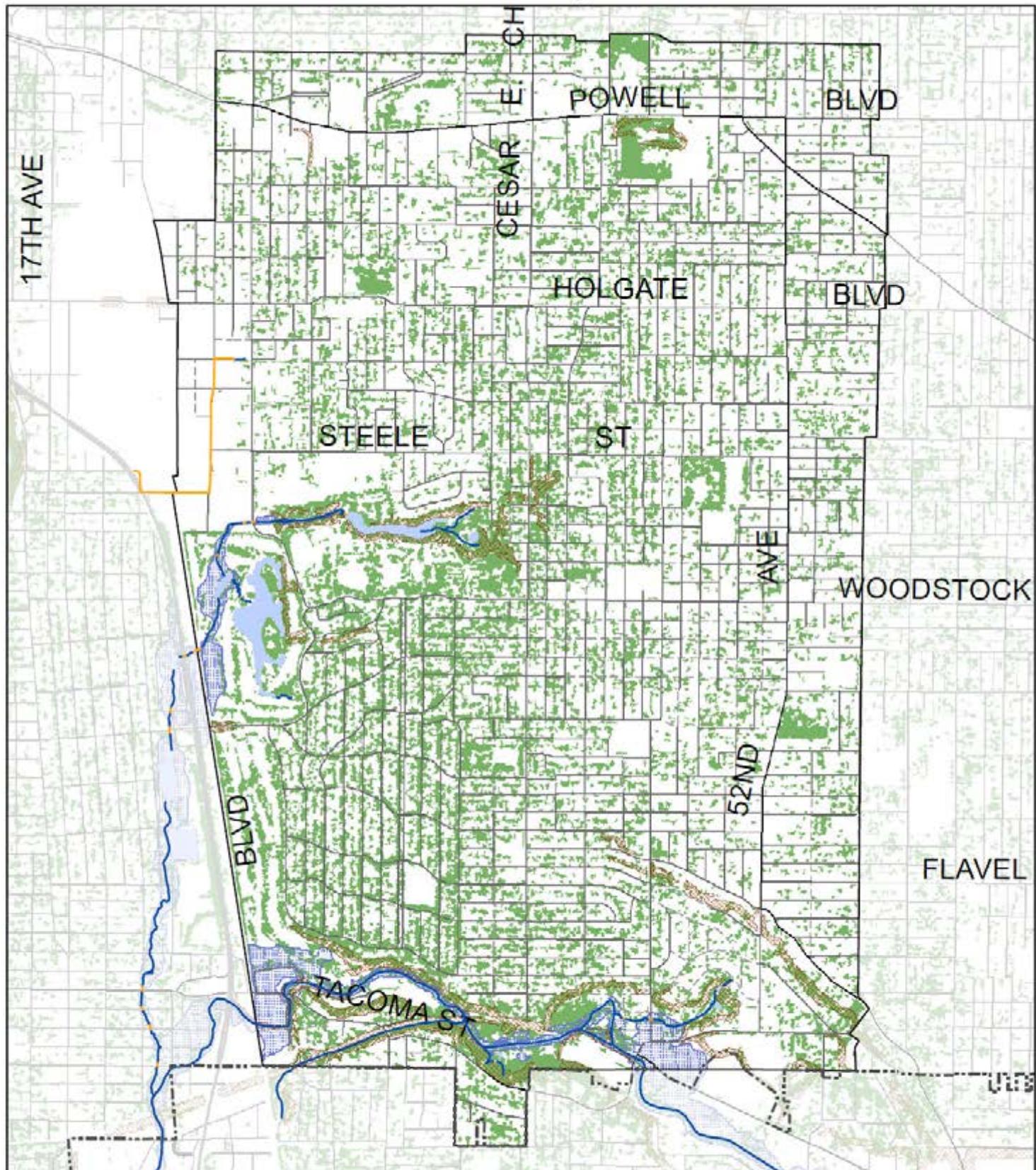
## Portland Watersheds



## Portland Stormwater System



# Woodstock Analysis Area



## Watersheds and Natural Features

- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



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August 9, 2011

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# Woodstock Analysis Area Demographics (2000 – 2010)

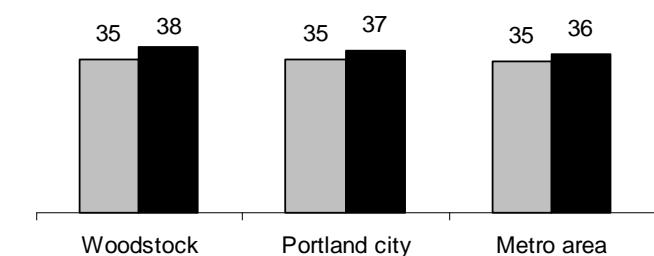
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

	Woodstock	Portland city	Metro area
2010	31,266	583,776	2,226,009
2000	30,357	529,121	1,927,881
% change	3%	10%	15%

■ 2000 ■ 2010

## Median Age

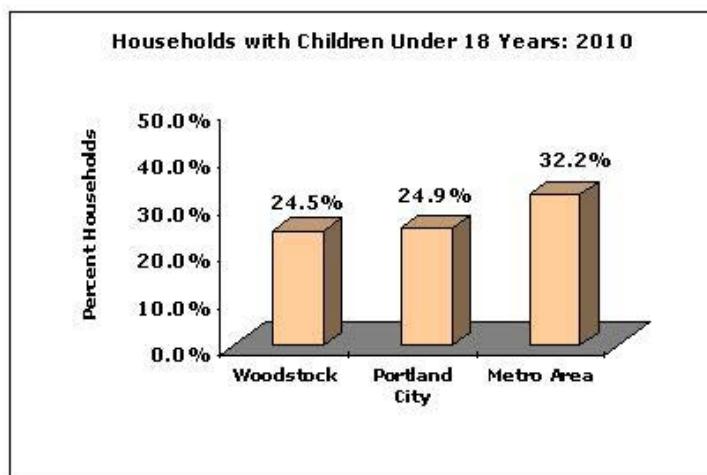
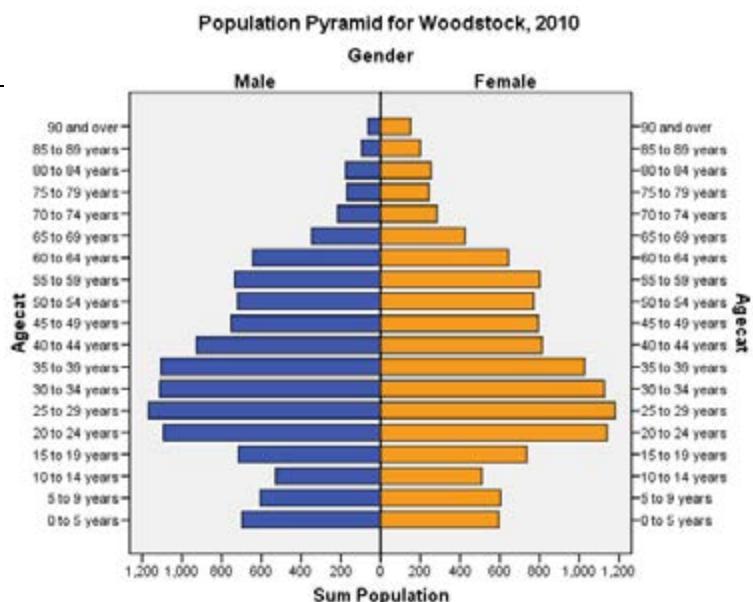
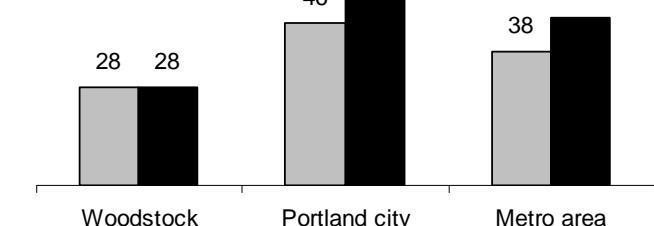


## Average Household Size

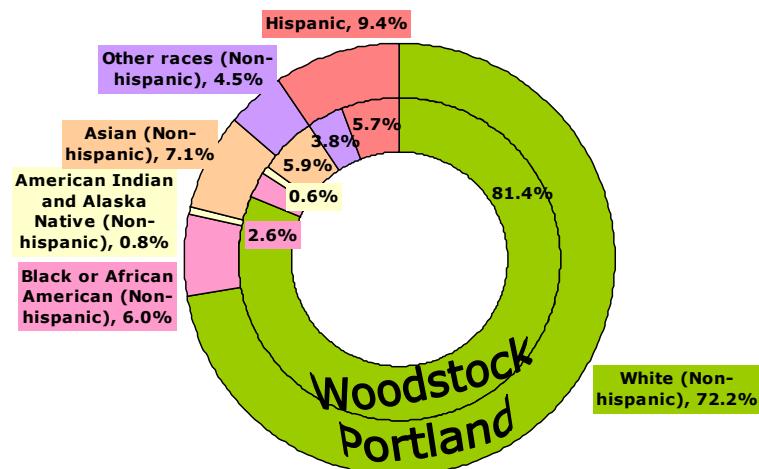


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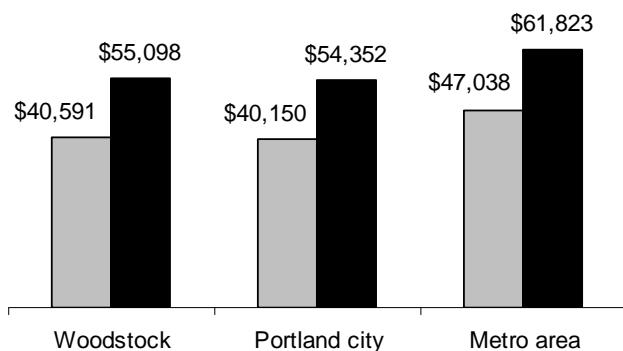
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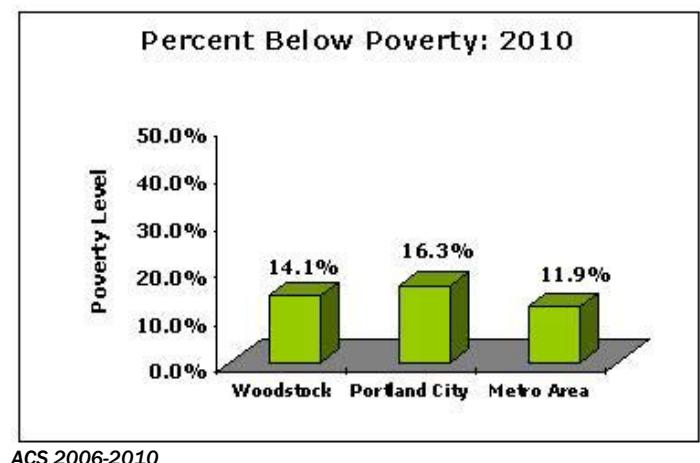
Racial and Ethnic Distribution in Portland vs. Woodstock



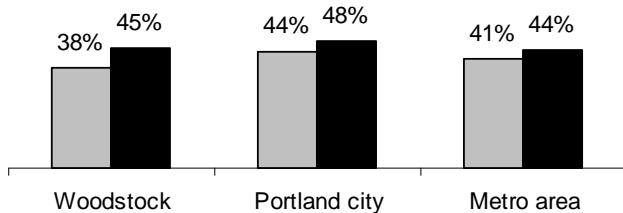
## Median Household Income



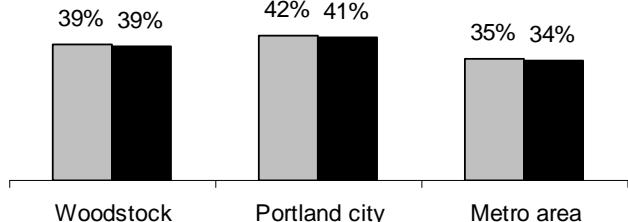
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Woodstock	Portland city	Metro area
2010	\$247,365	\$253,184	\$273,500
2000	\$152,397	\$154,721	\$168,347
% change	62.3%	63.6%	62.5%

# Woodstock Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

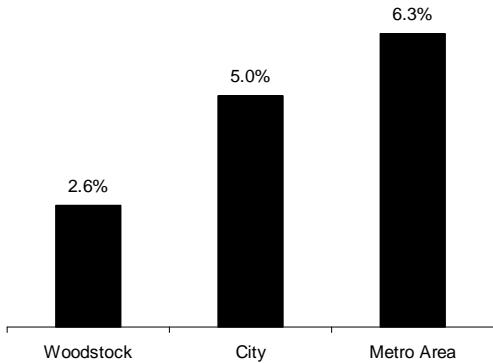
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### OFFICE SPACE

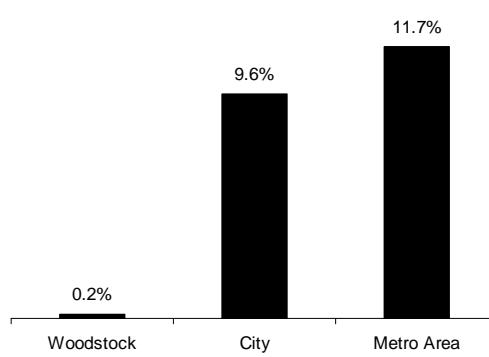
#### Square Feet

Woodstock	City	Metro Area
252,844	54,348,765	92,465,455

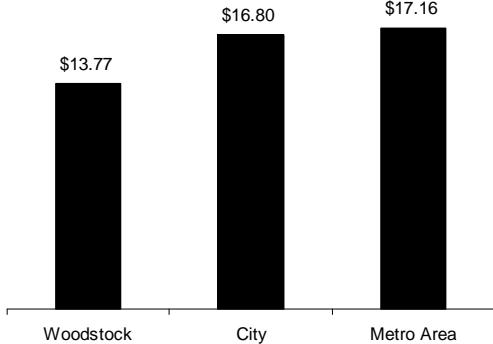
#### Retail Vacancy



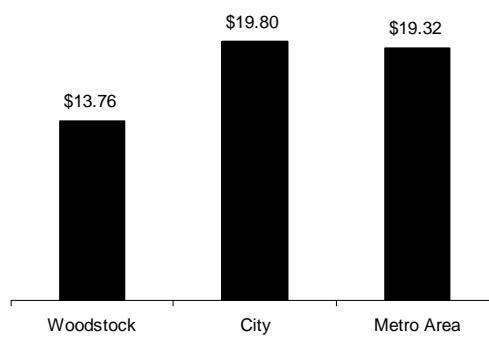
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Woodstock Analysis Area

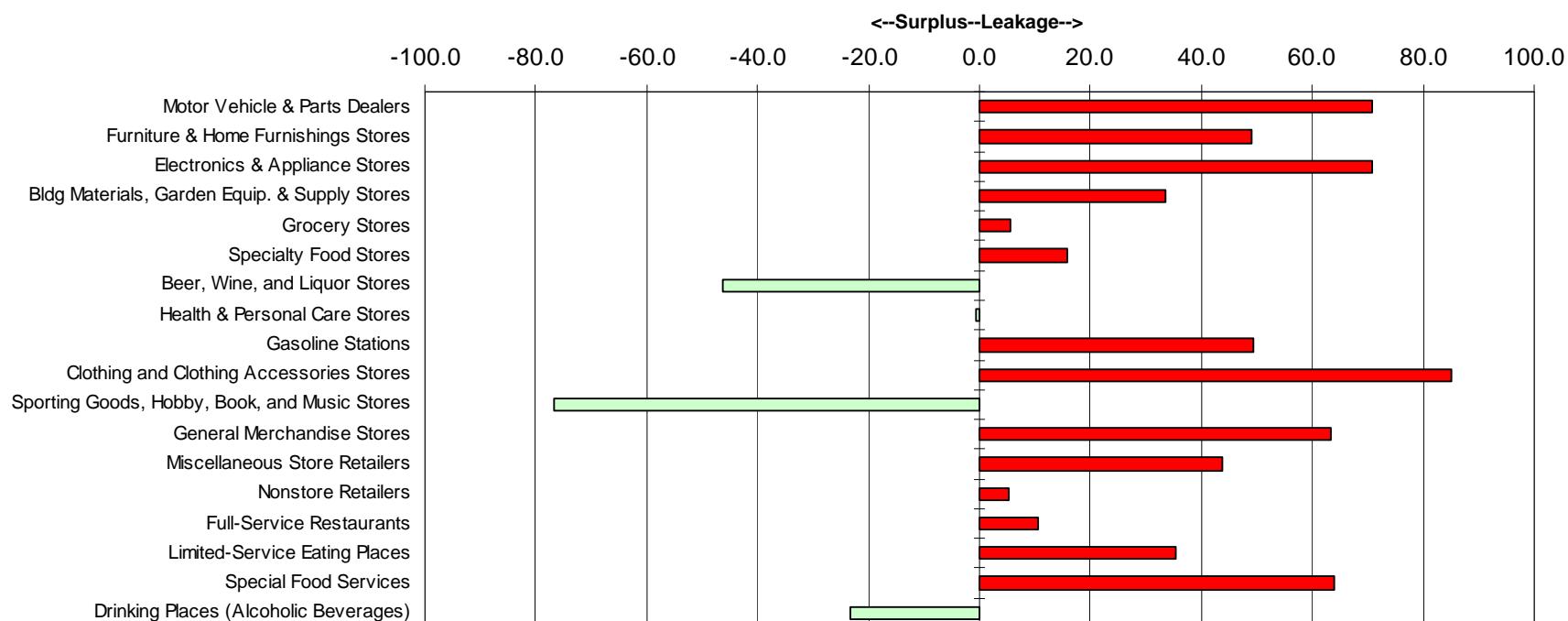
## Retail Market Profile

**Retail Gap = \$136 million**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$327,794,855	\$191,454,951	<b>\$136,339,904</b>	<b>26.3</b>	196
Total Retail Trade (NAICS 44-45)	\$279,542,679	\$159,253,521	<b>\$120,289,158</b>	<b>27.4</b>	130
Total Food & Drink (NAICS 722)	\$48,252,176	\$32,201,430	<b>\$16,050,746</b>	<b>20.0</b>	66

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Woodstock Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

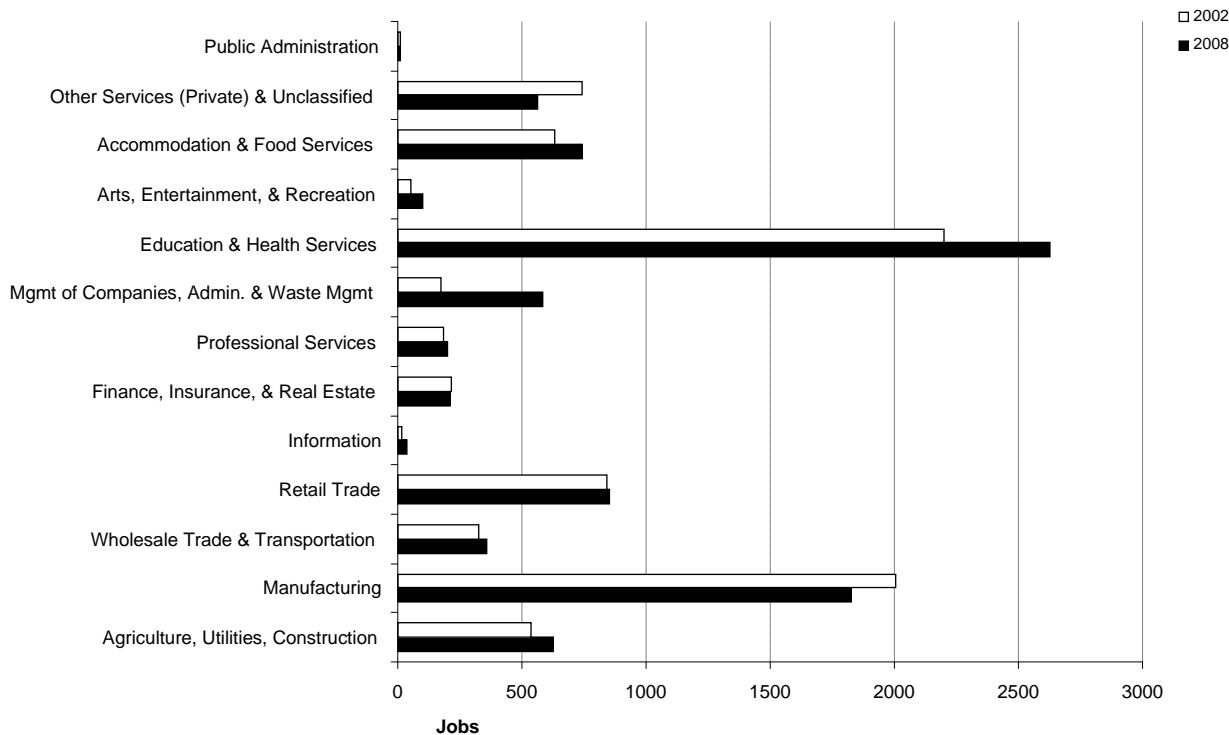
Source: Oregon Employment Department (OED)

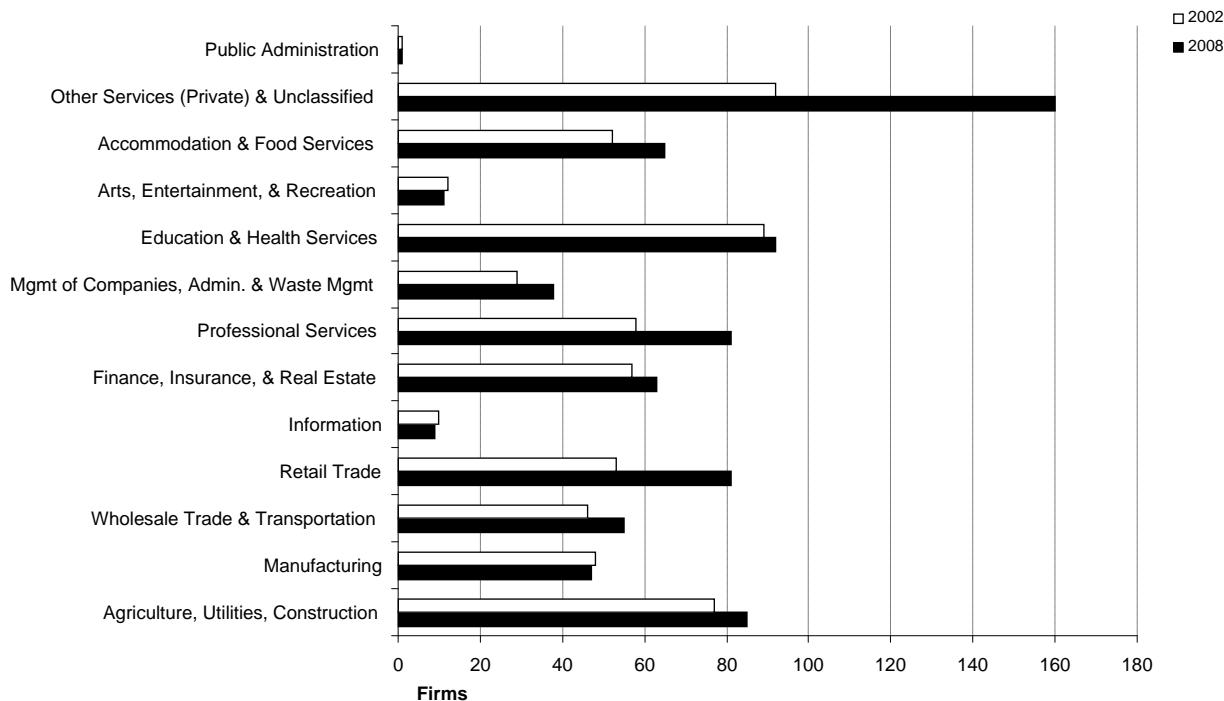
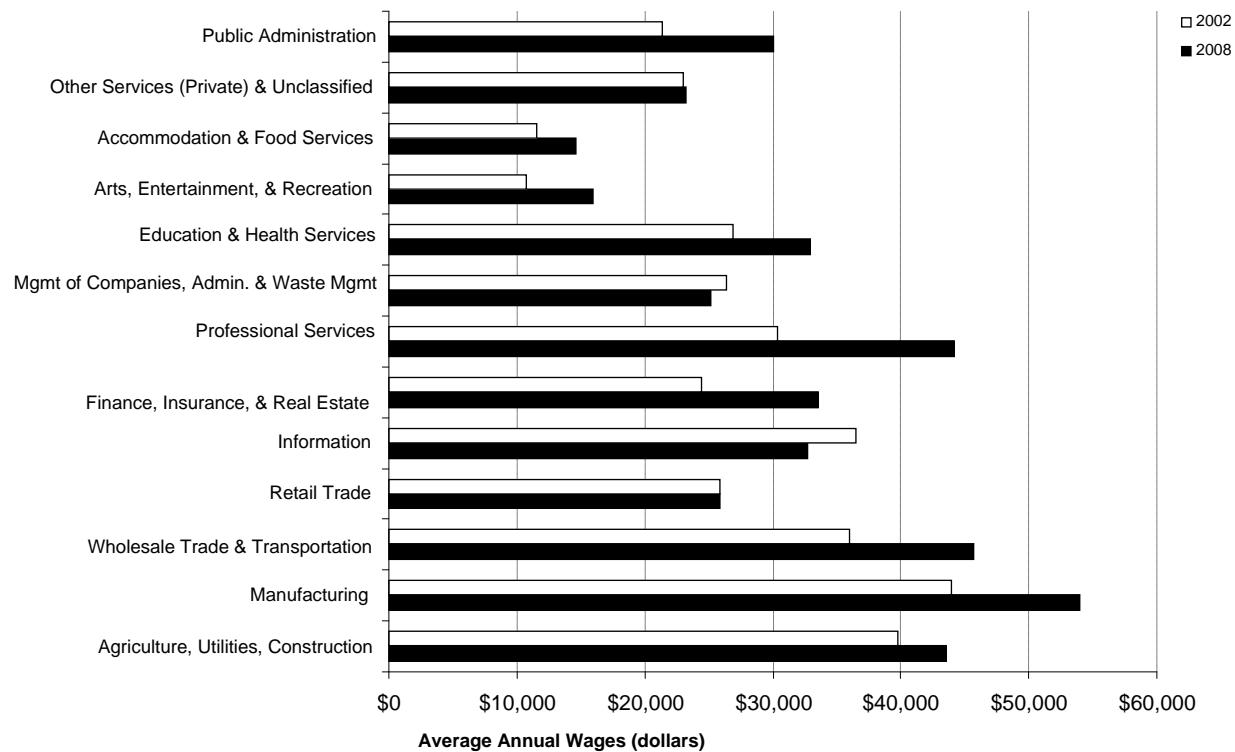
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*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	7,939	8,726	+787
Total Firms	624	788	+164
Average Annual Wages	\$30,622	\$35,277	+4,655

### Total Jobs



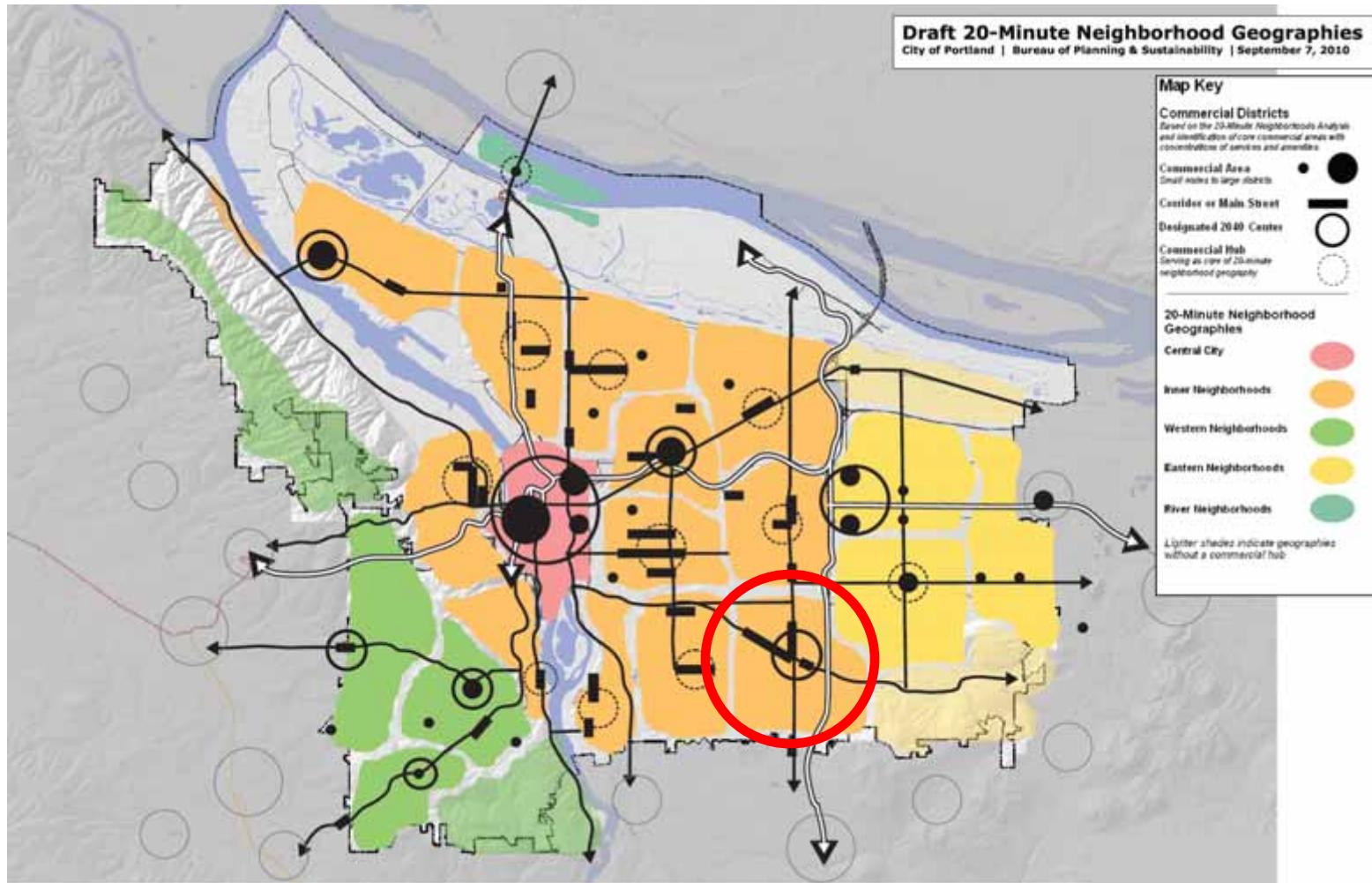
**Total Firms****Average Annual Wages**



## Lents-Foster Analysis Area

Including Foster-Powell, Lents, Mt. Scott-Arleta, and Brentwood-Darlington neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Lents-Foster Analysis Area

## Services and Amenities

*Population: 43,900 people (16,800 households)  
Land Area: 6.3 square miles (7,000 people per sq. mile)*

### Commercial Districts

The area's largest concentrations of commercial services are located along 82<sup>nd</sup>, particularly near SE Foster and between SE Holgate and Powell. This latter area includes the Eastport Plaza shopping center and its clustering of commercial services also extends along SE Powell. Other clusters of commercial services are located along Foster, particularly near SE Holgate and near 82<sup>nd</sup> Avenue; and in the Lents town center clustered around SE Foster and 92<sup>nd</sup>.

**Grocery stores:** 5 (1 store per 3,360 households)

**Retail gap:** \$34 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	91%
Within 1/2 mile of a public elementary school:	42%
Within 3 miles of a full-service community center*:	100%
Within 1/2 mile of a full-service grocery store:	32%
Within 1/4 mile of a frequent service transit stop:	43%

\*Parks Bureau service standard

**Community Centers:** 1 (Mt. Scott Community Center – full service)

**Libraries:** 1 (Holgate Library)

**Parks and Open Spaces:** 213 acres - including Lents, Bloomington, Glenwood, Harney, Brentwood, and Mt. Scott parks; and the Veterans Creek Natural Area.

**Tree Canopy Coverage:** 20%

**Public Schools:** 6 K-8 schools (Kelly, Whitman, and Woodmere elementary schools; Lent and Marysville K-8s, Lane Middle School\*)  
\*At edge of analysis area

**Colleges** (campus): None

**Hospitals:** None

**Farmers Markets:** 1 (Lents International Farmers' Market)

**Transit Centers/Stations:** 4 (Powell, Holgate, Lents Town Center, and Flavel light rail stations)

**Walkable Access Score:** 57 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Foster-Powell, Lents, Mt. Scott-Arleta, and Brentwood-Darlington

**Business Associations:** 82<sup>nd</sup> Avenue and Foster Area business associations

## Urban Form Characteristics

The area has a mix of inner neighborhood characteristics, such as compact blocks with fully-improved streets and sidewalks, and eastern neighborhood characteristics, especially in Brentwood-Darlington and other southern portions of the area, where many streets lack sidewalks or are not fully improved. Commercial corridors include a mix of Streetcar-Era main street patterns (parts of Foster Road and also 92<sup>nd</sup> Avenue in the Lents town center) and auto-oriented development with surface parking lots (particularly along the prominent corridors of 82<sup>nd</sup> Avenue and parts of Foster). The southeastern portion of the area includes prominent natural features, including Johnson Creek and adjacent floodplain areas, and streams and forested ravines at the edges of Mt. Scott.

**Access issues.** Includes a mix of areas with good street and sidewalk connectivity and other areas (particularly in southern areas) with poor connectivity. Areas near Foster Road and to the north have good access to transit and commercial and community services, but southern parts of the area lack convenient access to these services. The I-205 Freeway and natural areas act as barriers limiting access to the east and southeast.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Lents Town Center:	281 acres
Main Streets:	3.4 miles (82 <sup>nd</sup> Ave., Foster, Woodstock)
Station Communities:	4

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,770	59%	332
Multi-Family Residential:	537	18%	117
Commercial/Mixed-Use:	385	13%	280
Employment:	90	3%	45
Industrial:	57	2%	.5
Open Space:	168	6%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

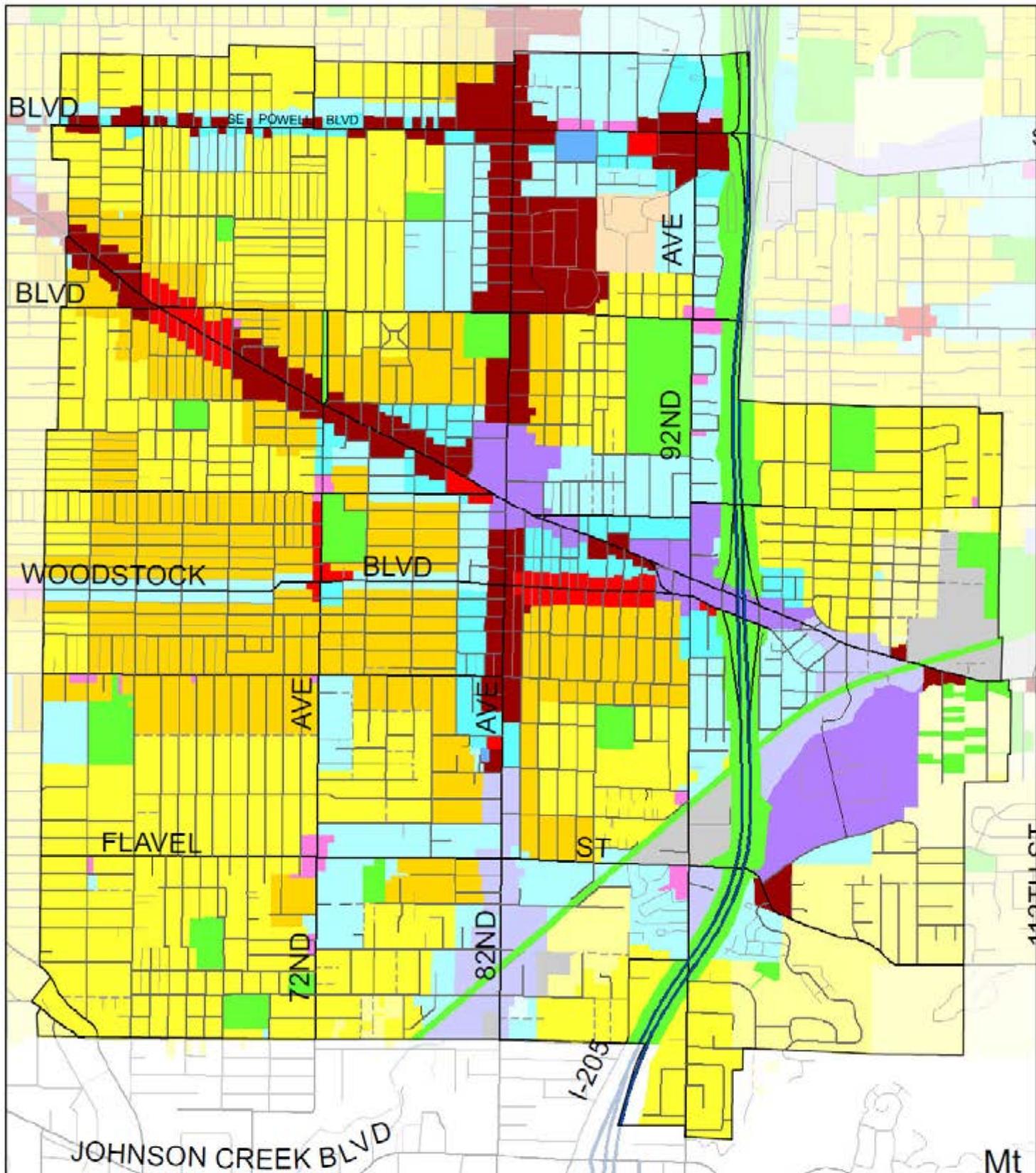
2010 Housing Units (Census):	17,770
2035 Housing Units:	27,900

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Lents-Foster Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet

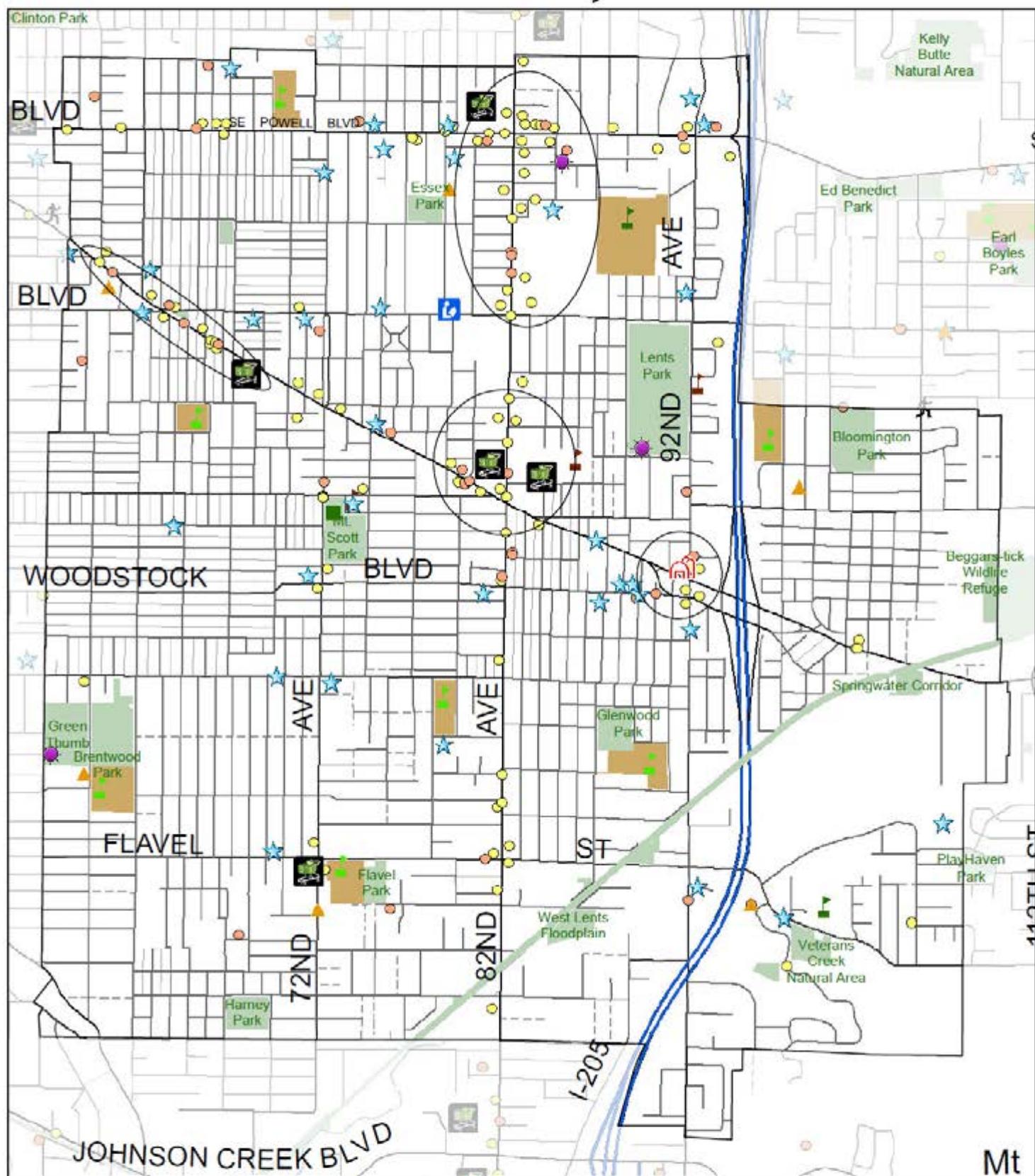


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City of Portland, Oregon  
Sam Adams, Mayor - Susan Anderson, Director

# Lents-Foster Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Farmers Markets
- Community Gardens
- Community Centers
- County Aging Services
- ▼ Preschools
- ▲ Daycare Centers
- Public HS
- Public K-8
- Private Schools
- County Health Clinic

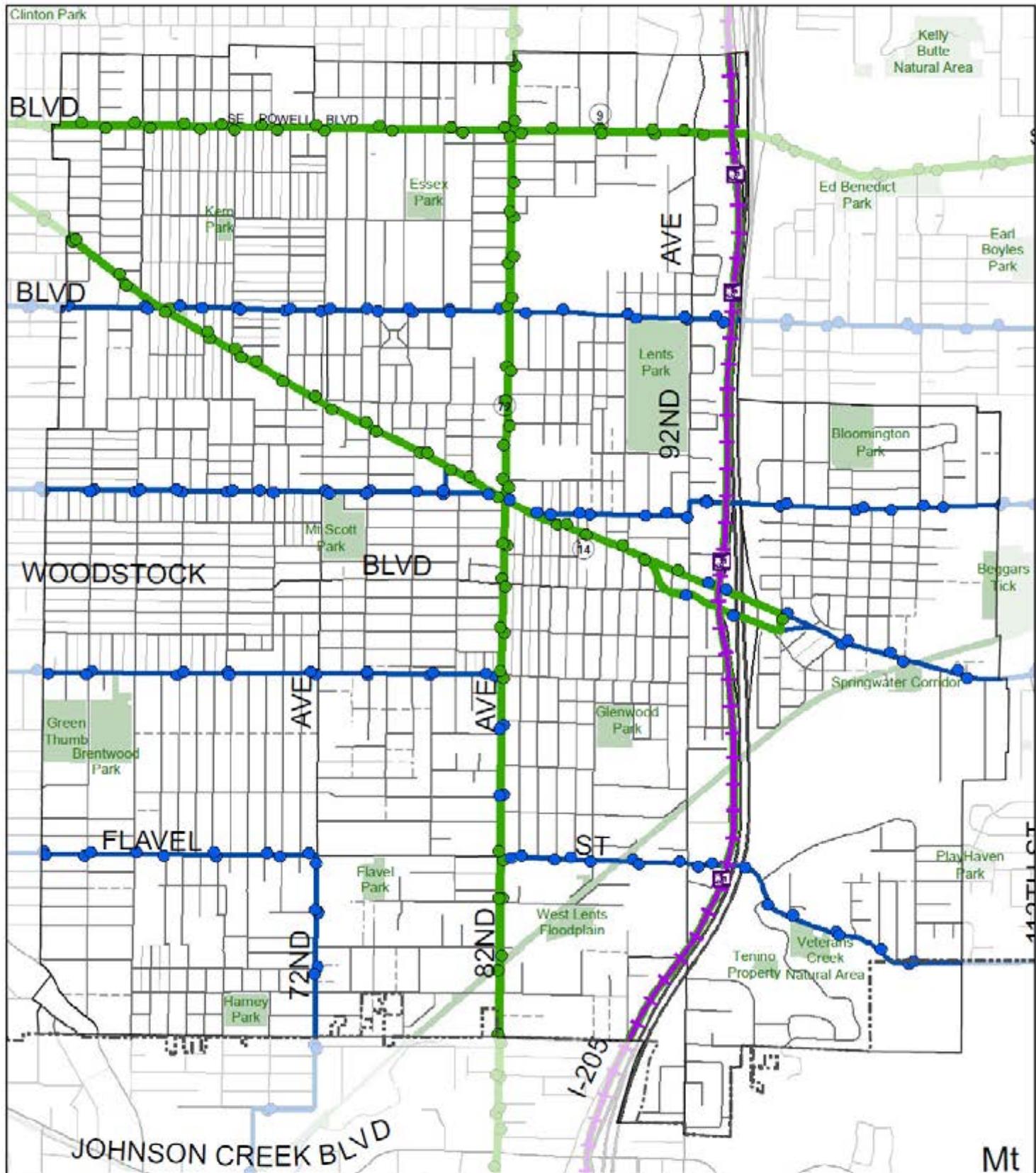


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# Lents-Foster Analysis Area



## Transit Infrastructure

February 1, 2012

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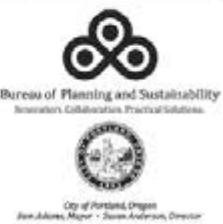
Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX	Rush Hour Stops
Streetcar	

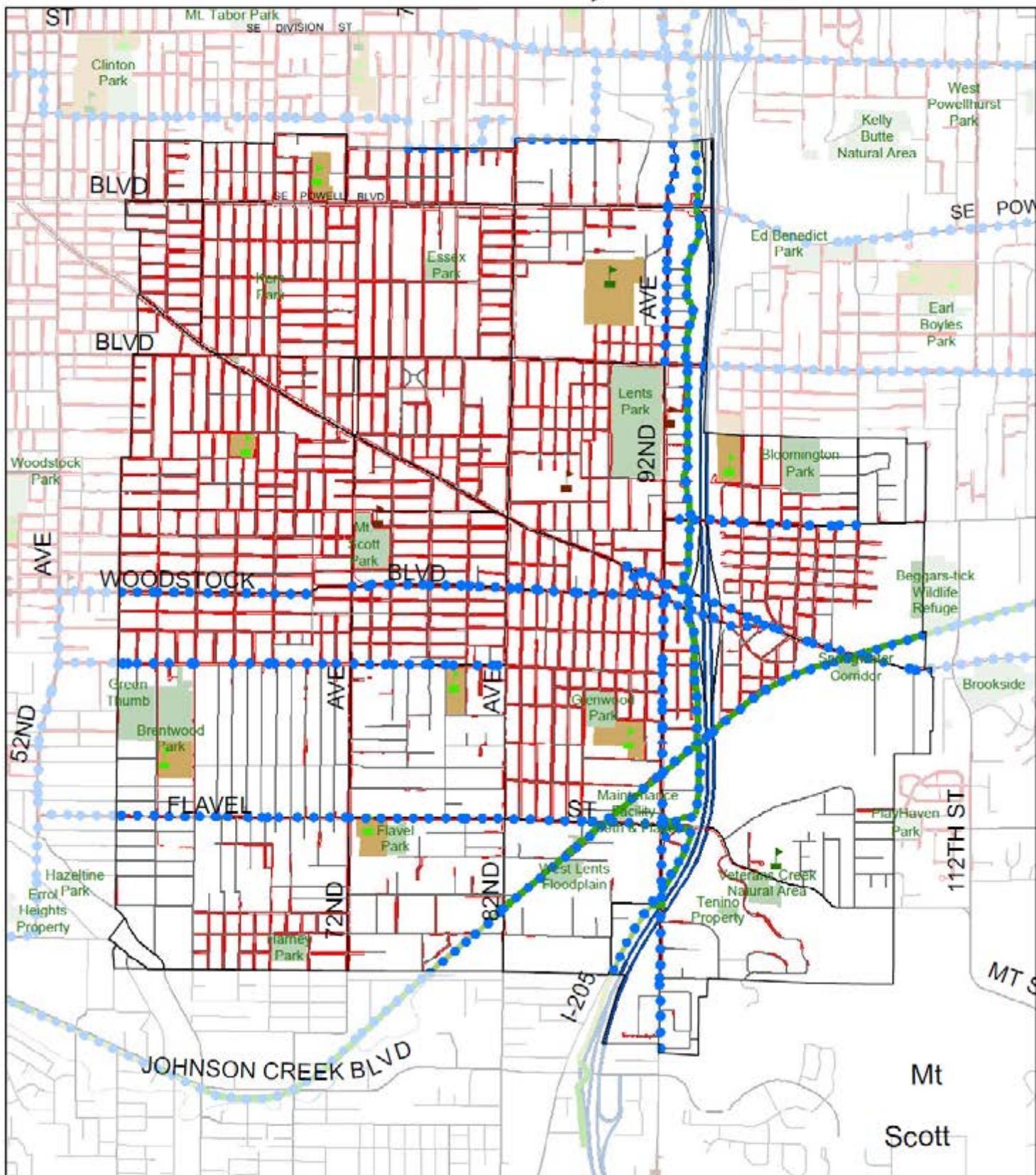
Light Rail	Bus
MAX	Frequent Service
Streetcar	Standard Service
MAX	Rush Hour Only Service
Streetcar	

—	—	—	—	—	—	—	—
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Feet							



# Lents-Foster Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet

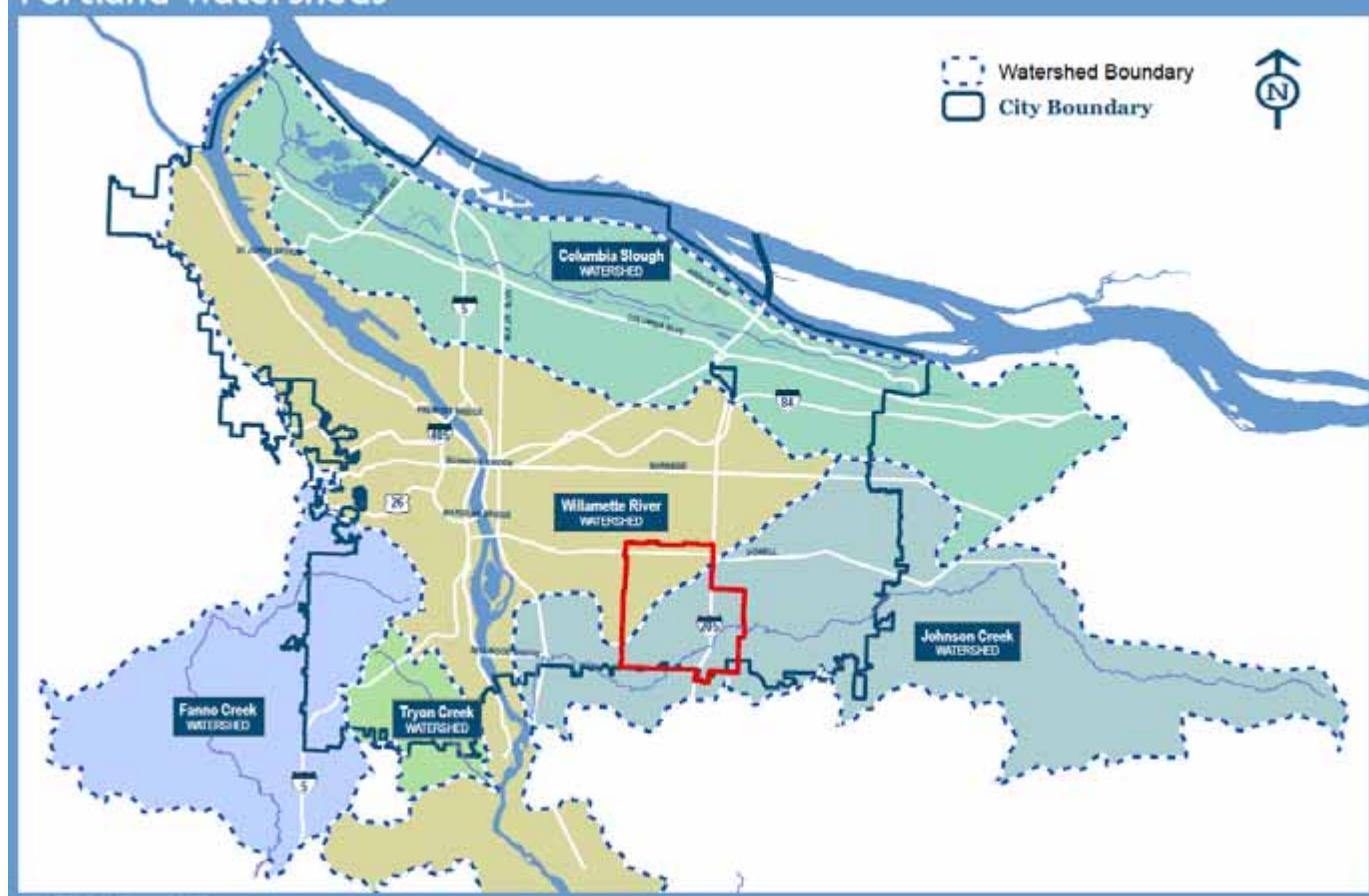


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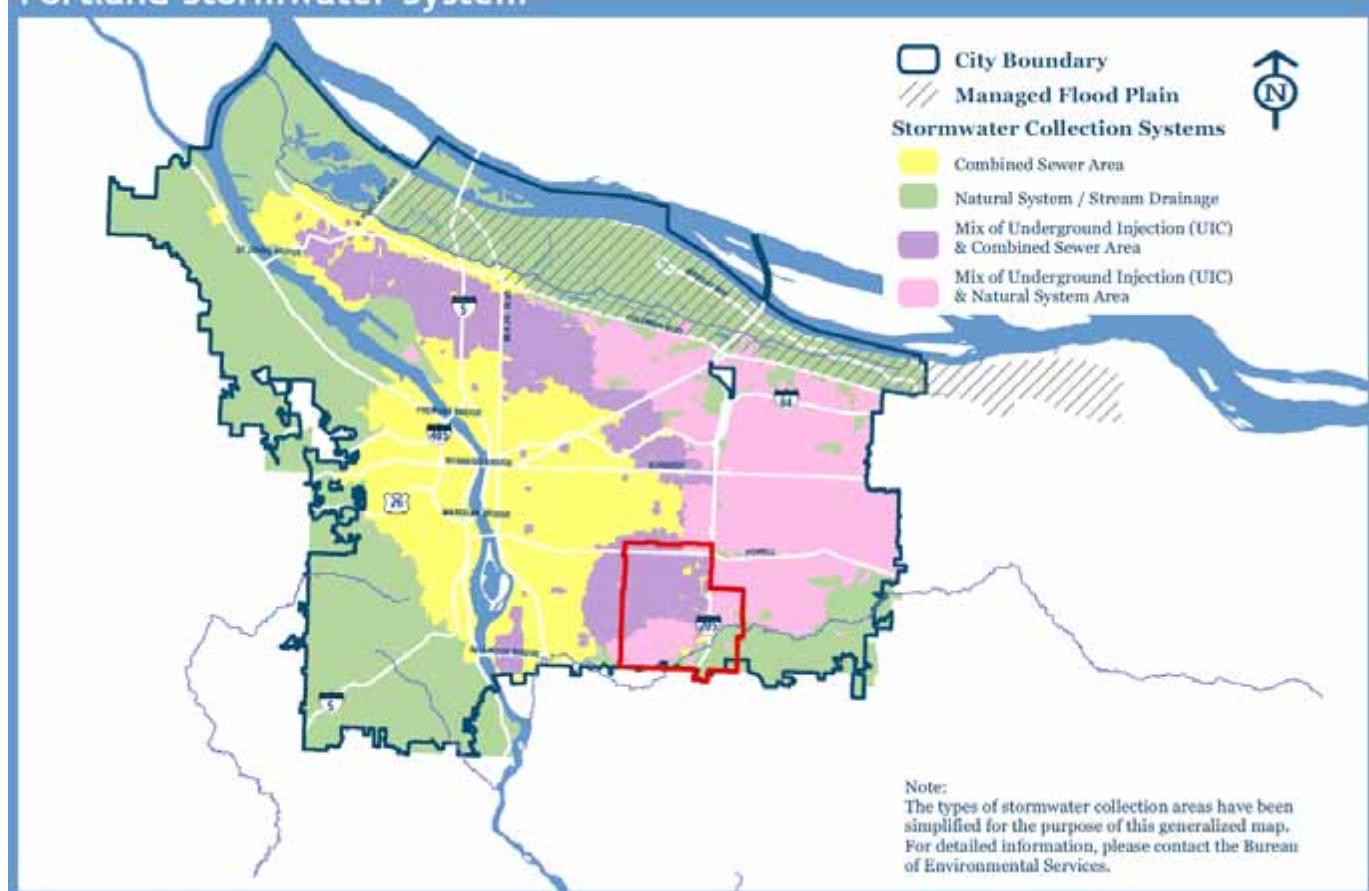


City of Portland, Oregon  
Tom Adams, Mayor - Sam Adams, Director

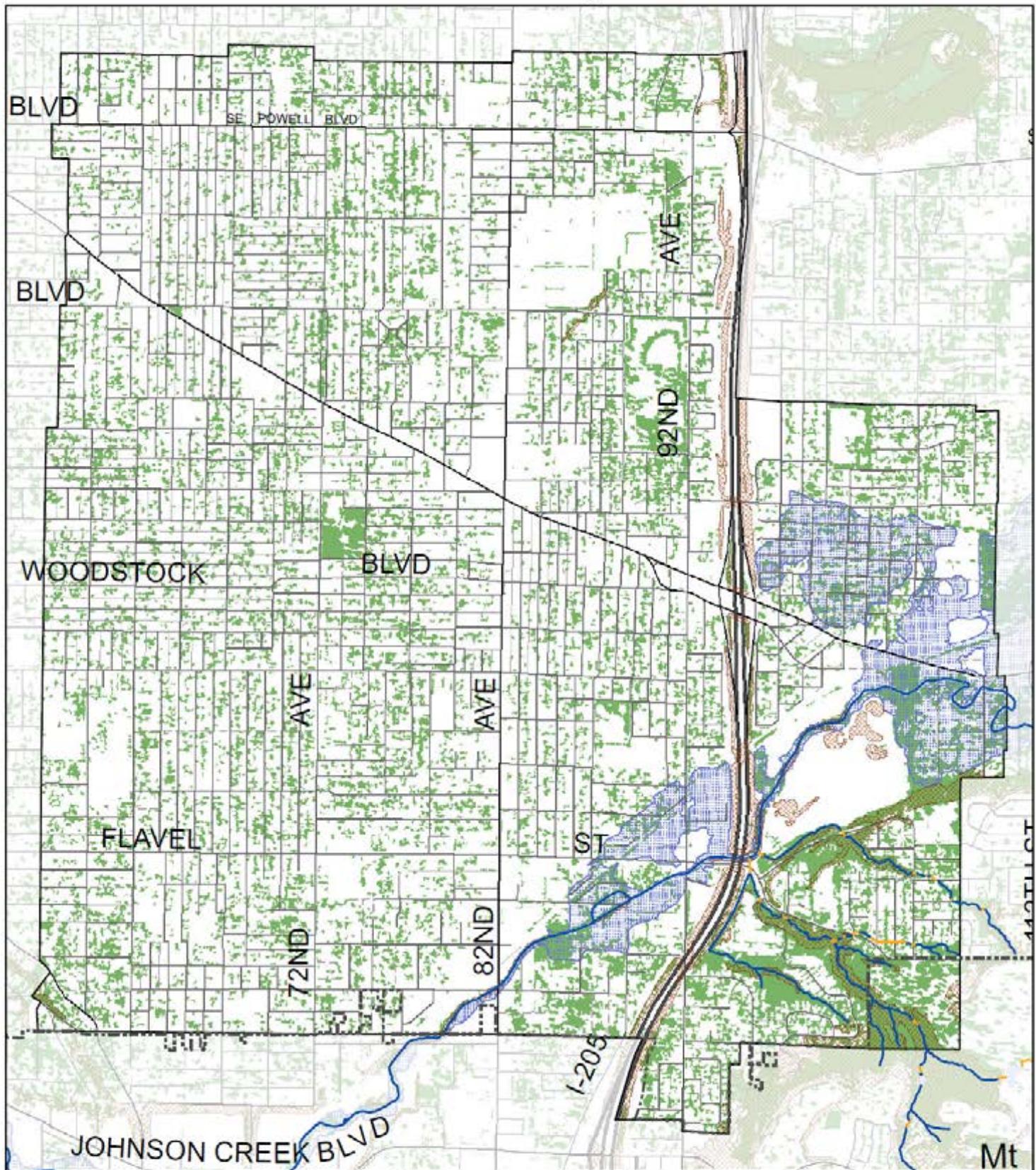
## Portland Watersheds



## Portland Stormwater System



# Lents-Foster Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



# Lents-Foster Analysis Area Demographics (2000 – 2010)

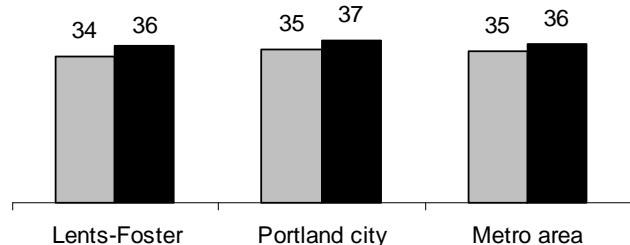
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

	Lents-Foster	Portland city	Metro area
2010	43,891	583,776	2,226,009
2000	40,472	529,121	1,927,881
% change	8%	10%	15%

■ 2000 ■ 2010

## Median Age

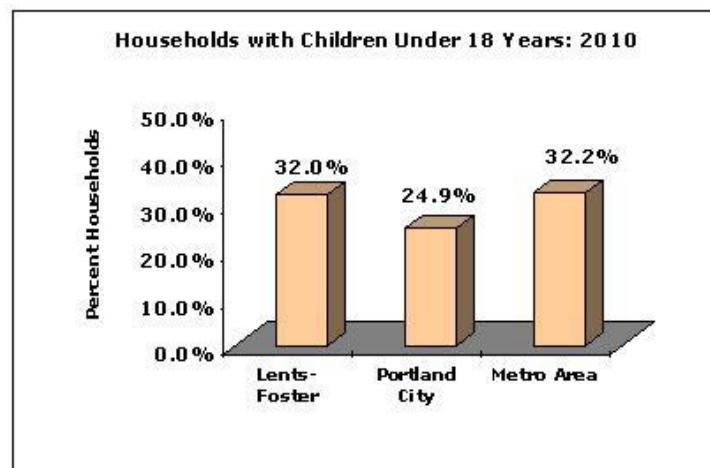
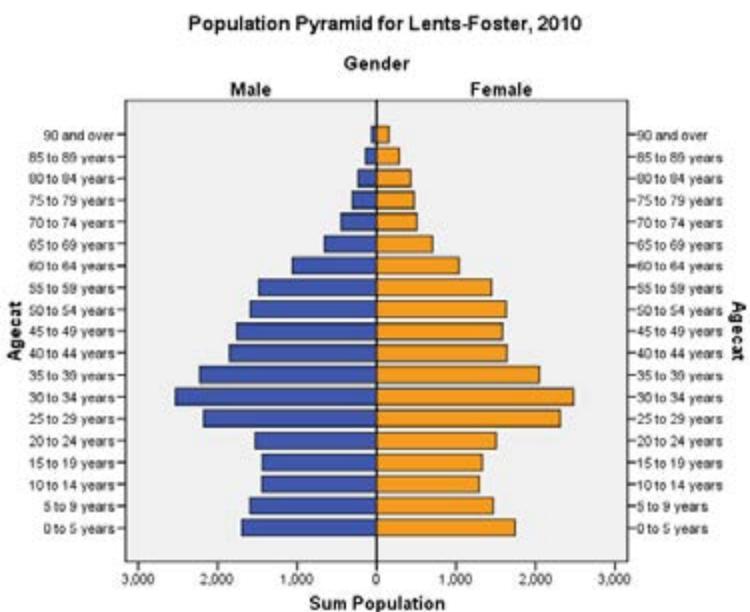
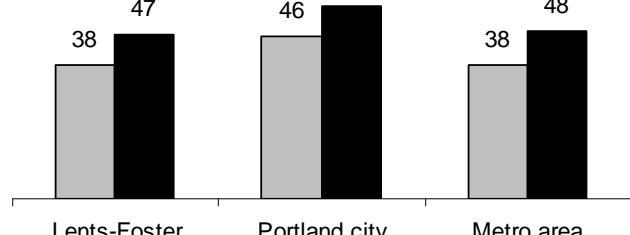


## Average Household Size

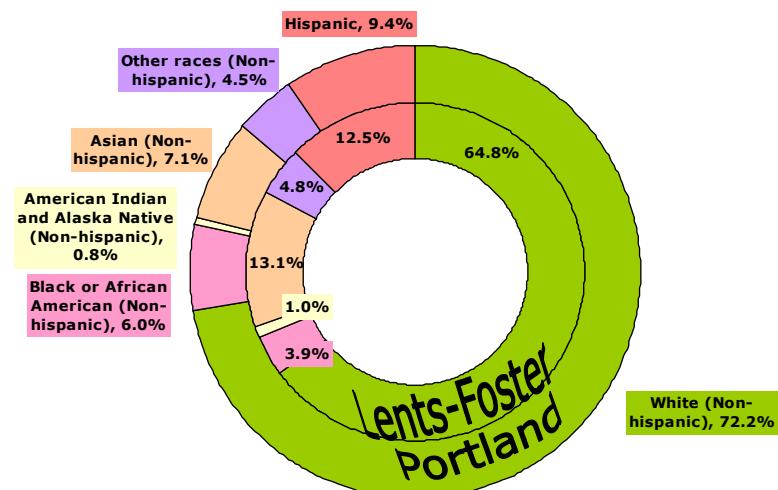


## Diversity Index

(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



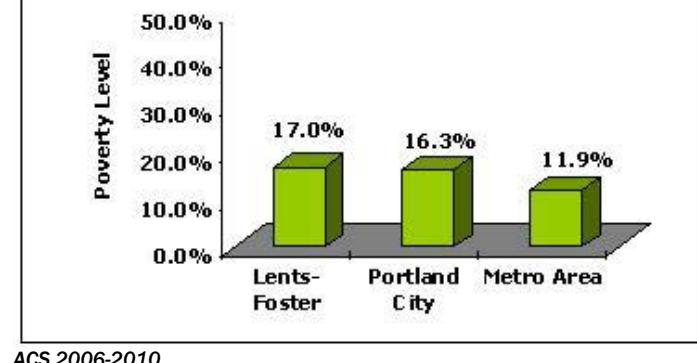
## Racial and Ethnic Distribution in Portland vs. Lents-Foster



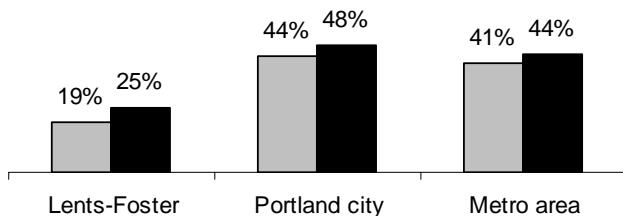
## Median Household Income



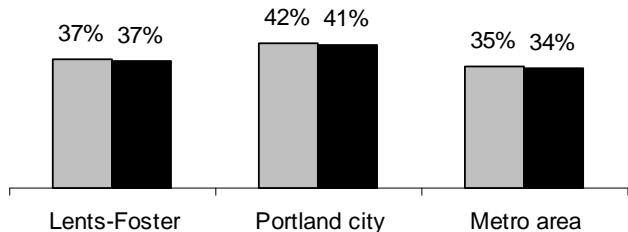
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Lents-Foster	Portland city	Metro area
2010	\$191,470	\$253,184	\$273,500
2000	\$120,837	\$154,721	\$168,347
% change	58.5%	63.6%	62.5%

## Lents-Foster Analysis Area

### Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

#### RETAIL

##### Square Feet

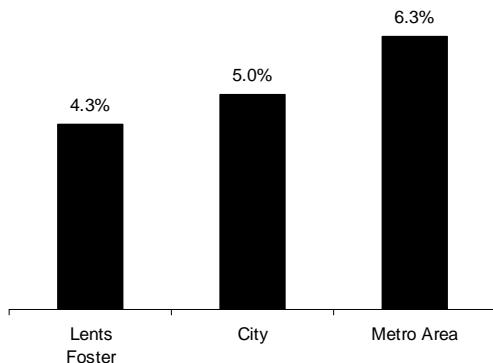
Lents Foster	City	Metro Area
1,125,825	51,937,895	107,875,146

#### OFFICE SPACE

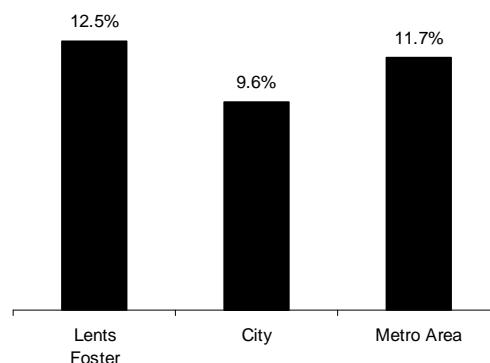
##### Square Feet

Lents Foster	City	Metro Area
252,844	54,348,765	92,465,455

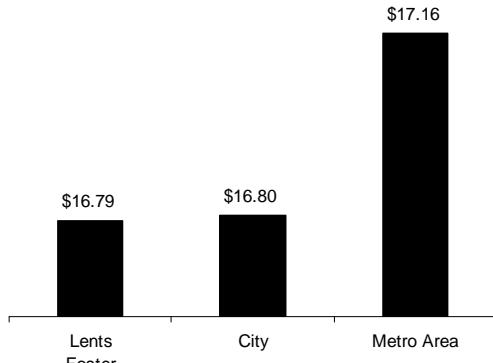
#### Retail Vacancy



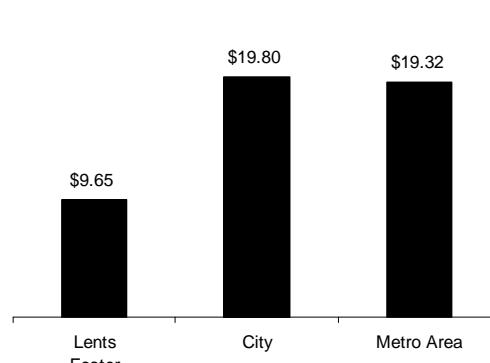
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Lents-Foster Analysis Area

## Retail Market Profile

**Retail Gap = \$34 million**

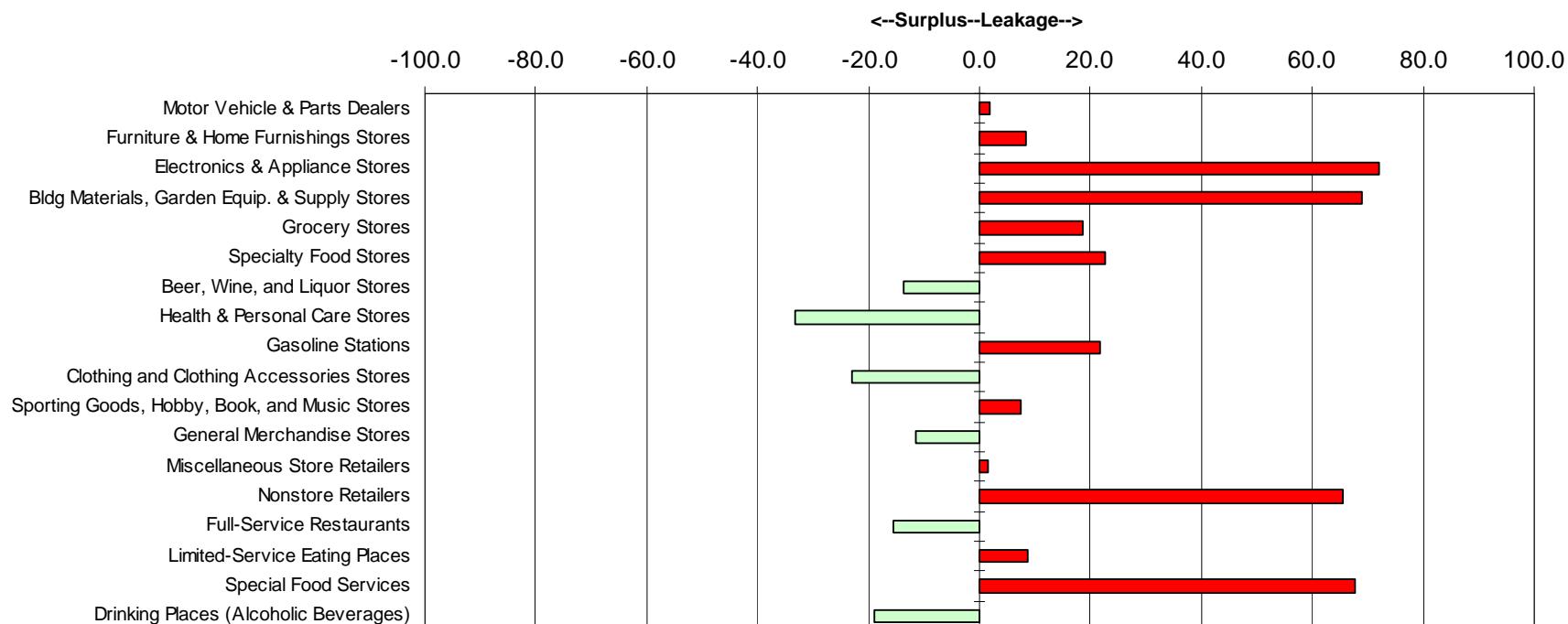
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$345,272,969	\$311,166,451	\$34,106,518	5.2	330
Total Retail Trade (NAICS 44-45)	\$294,557,571	\$260,989,428	\$33,568,143	6.0	221
Total Food & Drink (NAICS 722)	\$50,715,398	\$50,177,023	\$538,375	0.5	109

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



## Lents-Foster Analysis Area

### Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

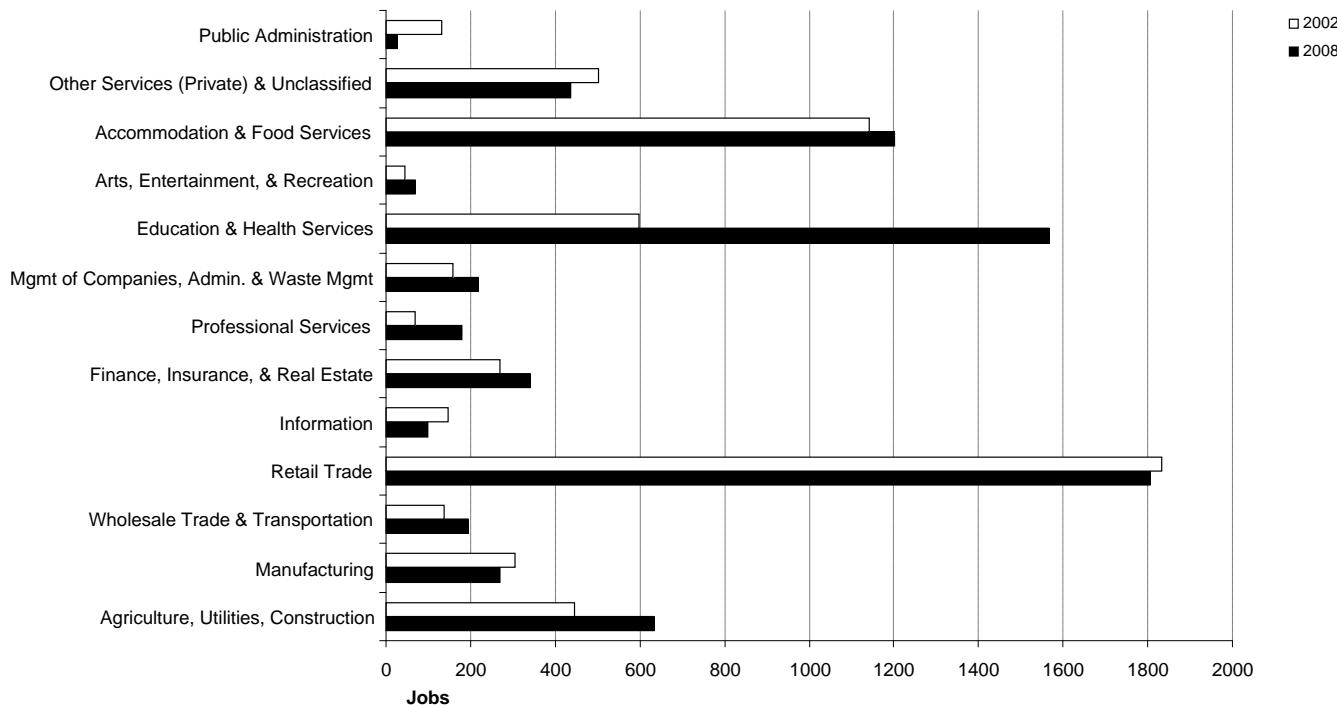
Source: Oregon Employment Department (OED)

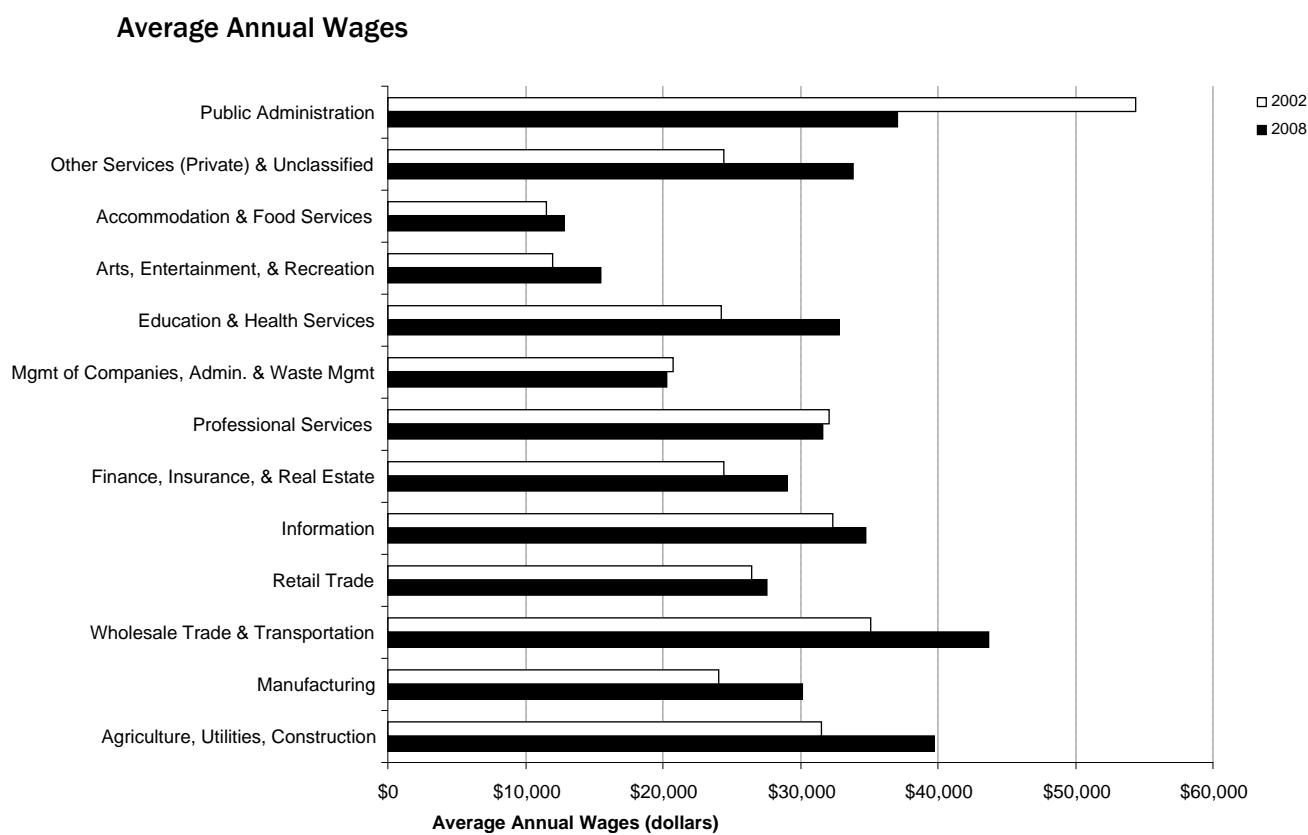
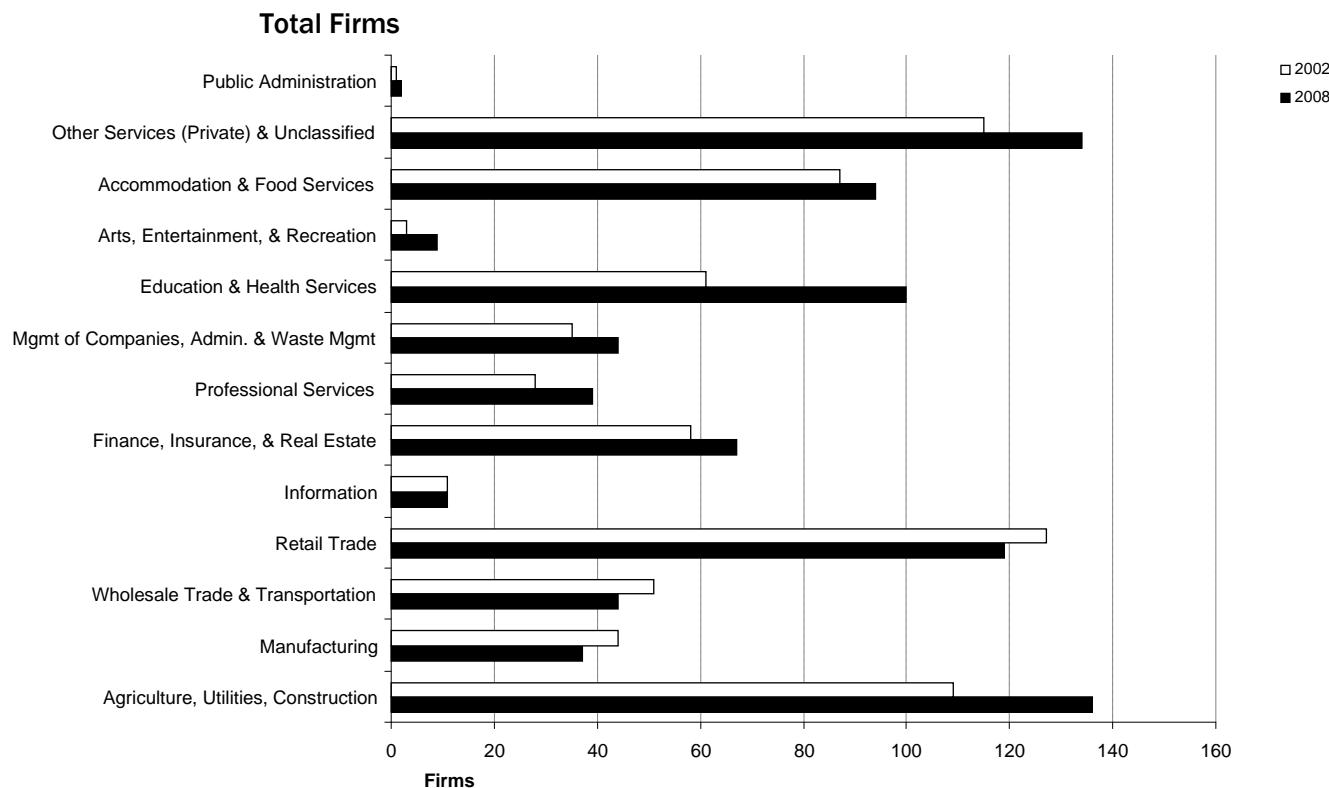
*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	5,785	7,040	+1,255
Total Firms	730	836	+106
Average Annual Wages	\$24,514	\$28,202	+3,687

#### Total Jobs



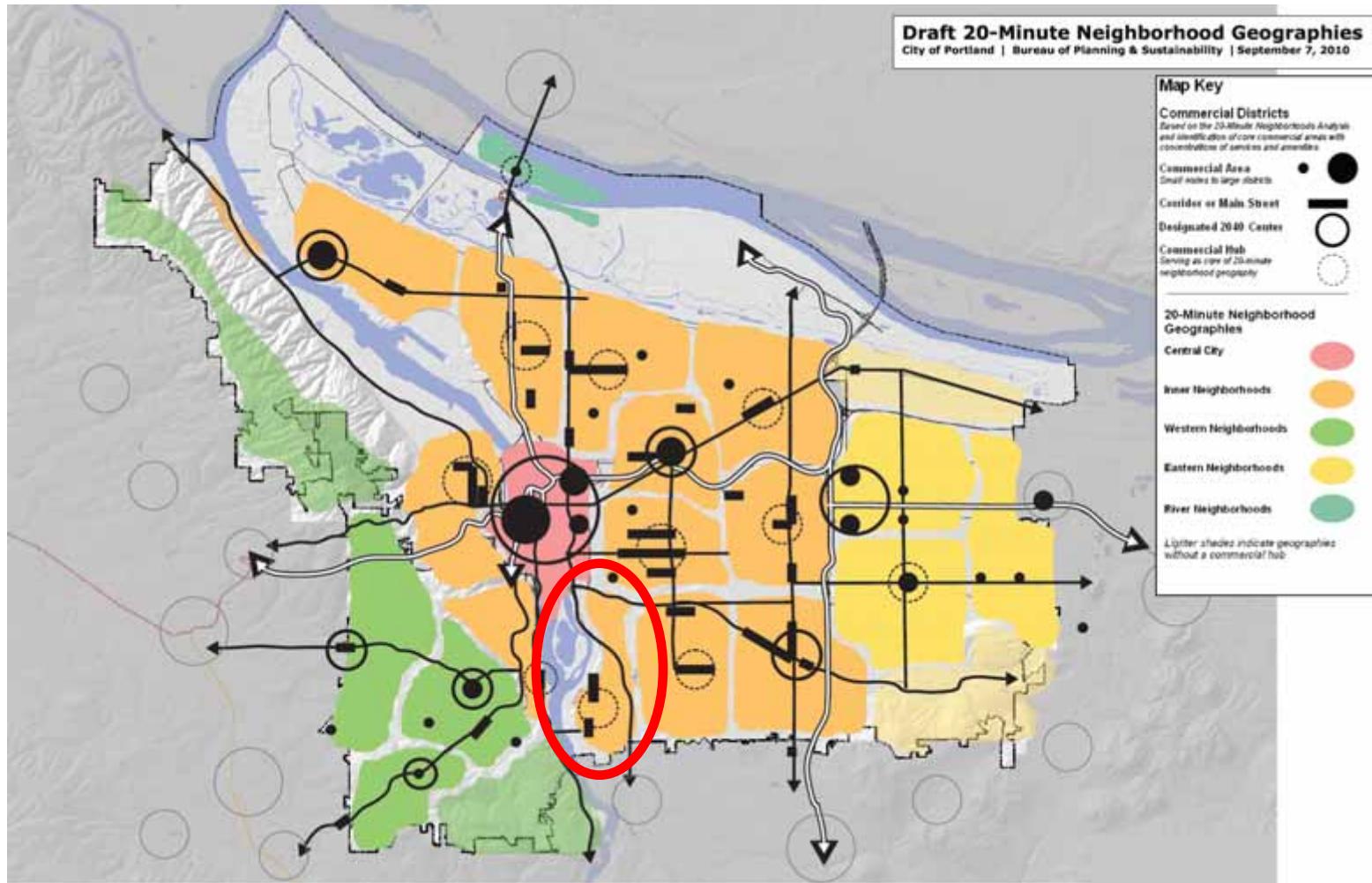




## Sellwood-Moreland-Brooklyn Analysis Area

Including the Sellwood-Moreland and Brooklyn neighborhoods

### Services, Demographics and Market Summary



### 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Sellwood-Moreland-Brooklyn Analysis Area

## Services and Amenities

*Population: 15,300 people (7,400 households)  
Land Area: 2.9 square miles (5,400 people per sq. mile)*

### Commercial Districts

The area's largest concentrations of commercial services are located along SE 13<sup>th</sup> (once known as "Antique Row") and in the Westmoreland shopping area at SE Milwaukie and SE Bybee. Other clusters of commercial services are located along other portions of SE Milwaukie, including the Brooklyn commercial district at SE Milwaukie and SE Powell, and on SE 17<sup>th</sup> near SE Tacoma.

**Grocery stores:** 2 (1 store per 3,700 households)

**Retail gap:** \$35 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	95%
Within 1/2 mile of a public elementary school:	29%
Within 3 miles of a full-service community center*:	0%
Within 1/2 mile of a full-service grocery store:	47%
Within 1/4 mile of a frequent service transit stop:	16%

\*Parks Bureau service standard

**Community Centers:** 1 (Sellwood Community Center)

**Libraries:** 1 (Sellwood-Moreland Library)

**Parks and Open Spaces:** 309 acres - including Brooklyn, Powell, Sellwood, Sellwood Riverfront, Johnson Creek and Westmoreland parks, and the Oaks Bottom Wildlife Refuge.

**Tree Canopy Coverage:** 23%

**Public Schools:** 3 K-8 schools (Llewellyn and Winterhaven elementary schools, Sellwood Middle School)

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** 1 (Moreland Farmers Market)

**Transit Centers/Stations:** None

**Walkable Access Score:** 55 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Sellwood-Moreland, Brooklyn

**Business Associations:** Sellwood/Westmoreland Business Alliance, Greater Brooklyn Business Association

## Urban Form Characteristics

The majority of this area is composed of compact residential blocks, originally developed during the Streetcar Era with a continuous system of sidewalks. The area includes several commercial main streets lined by storefront buildings. Prominent natural features include the Willamette River and Oaks Bottom at the area's western edge, and Crystal Springs toward the east.

**Access issues.** Good street and sidewalk connectivity. Fairly good access to commercial and community services, but most residents are beyond convenient walking distance to frequent service transit. Access to adjacent areas is limited by natural and built boundaries, including the Willamette River and bluffs to the west, McLoughlin Boulevard and open spaces to the east, railroad tracks to the east and south, and Powell Boulevard to the north.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	3.1 miles (Milwaukie, Tacoma)
Station Communities:	5 planned (along Portland-Milwaukie light rail line)

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	554	42%	46
Multi-Family Residential:	131	10%	25
Commercial/Mixed-Use:	132	10%	40
Employment:	80	6%	22
Industrial:	180	14%	0
Open Space:	314	18%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

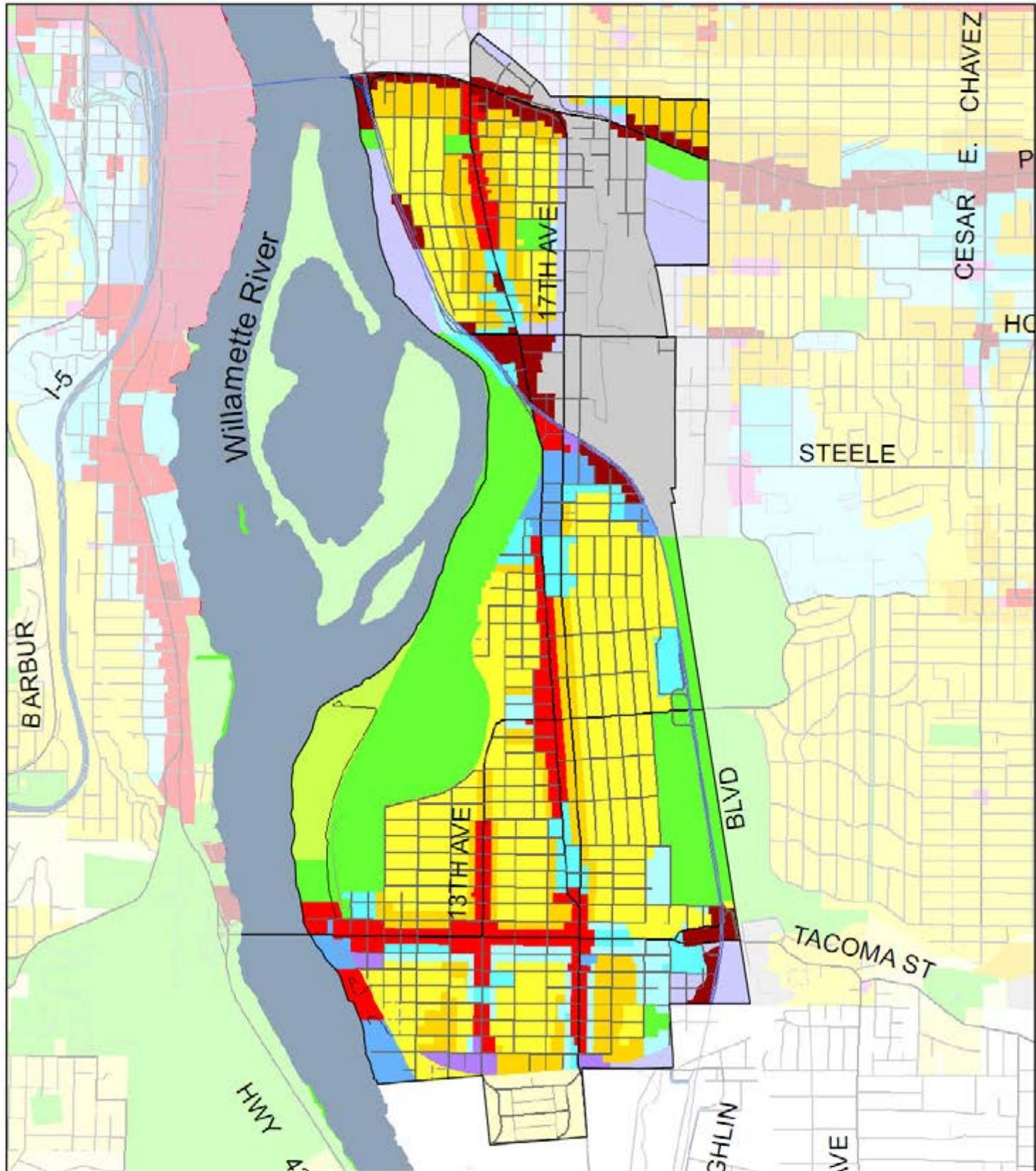
2010 Housing Units (Census):	7,851
2035 Housing Units:	9,600

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Sellwood-Moreland-Brooklyn Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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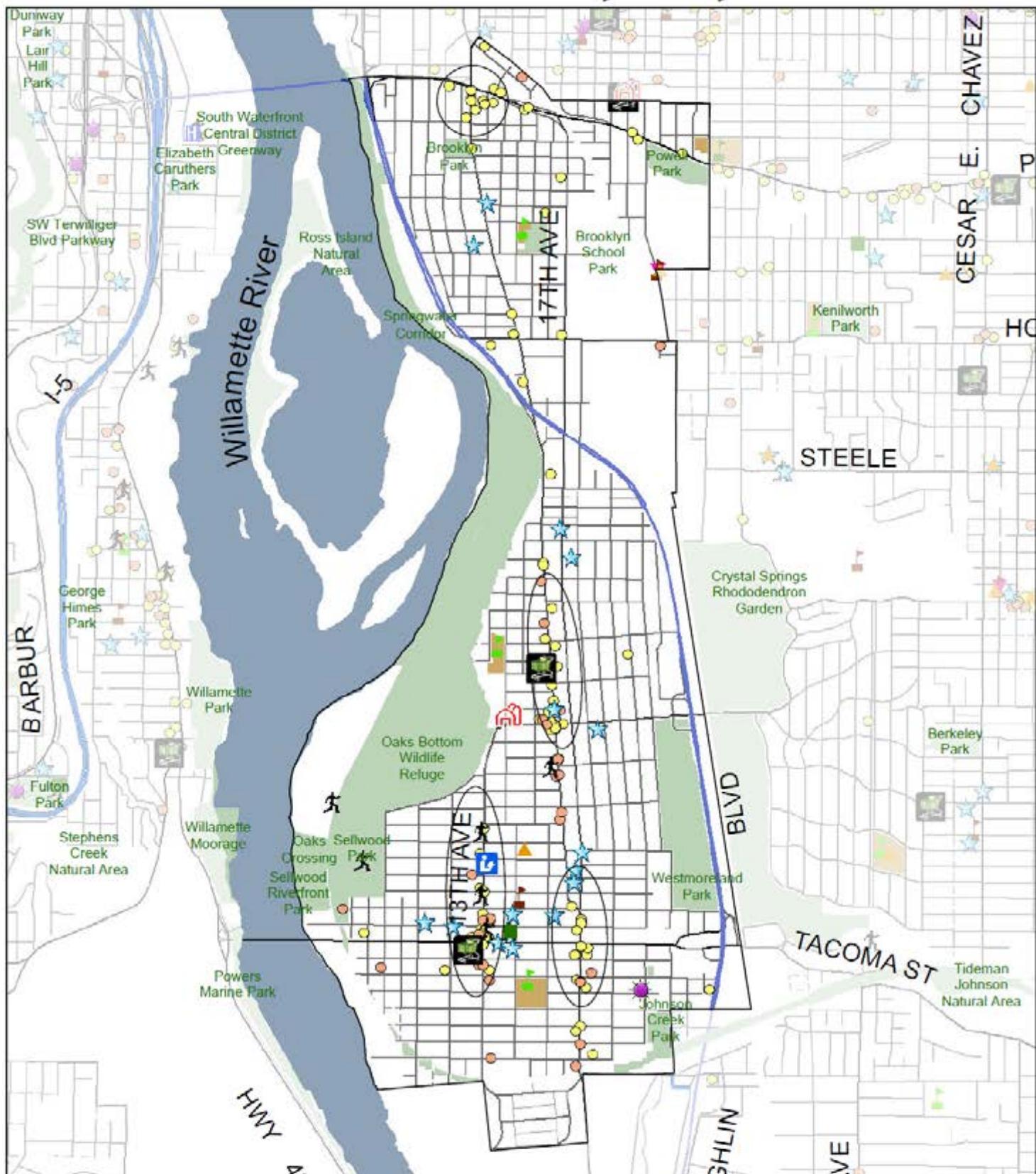


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City of Portland Mayor Tom Adams, Mayor - Sam Adams, Director

# Sellwood-Moreland-Brooklyn Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

City of Portland Bureau of Planning and Sustainability



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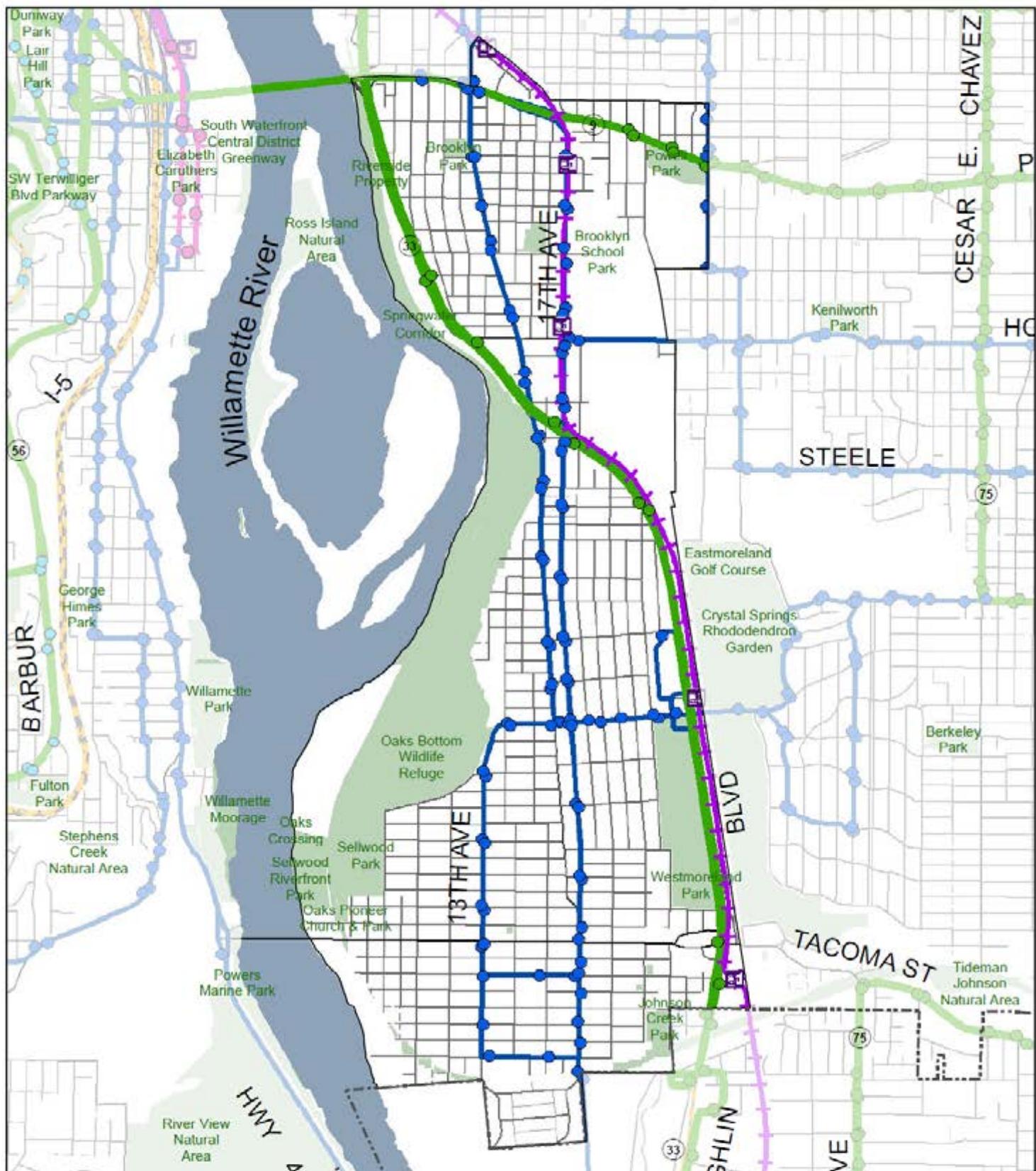


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City of Portland Oregon  
Sam Adams Mayor - Jason Antonio Director

# Sellwood-Moreland-Brooklyn Analysis Area



## Transit Infrastructure

February 1, 2012

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Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX	Rush Hour Stops
Streetcar	

—	Green Line	Green Line
—	Blue Line	Blue Line
—	Yellow Line	Yellow Line
—	Black Line	Black Line
—	Red Line	Red Line



0 1,000 2,000 3,000 Feet

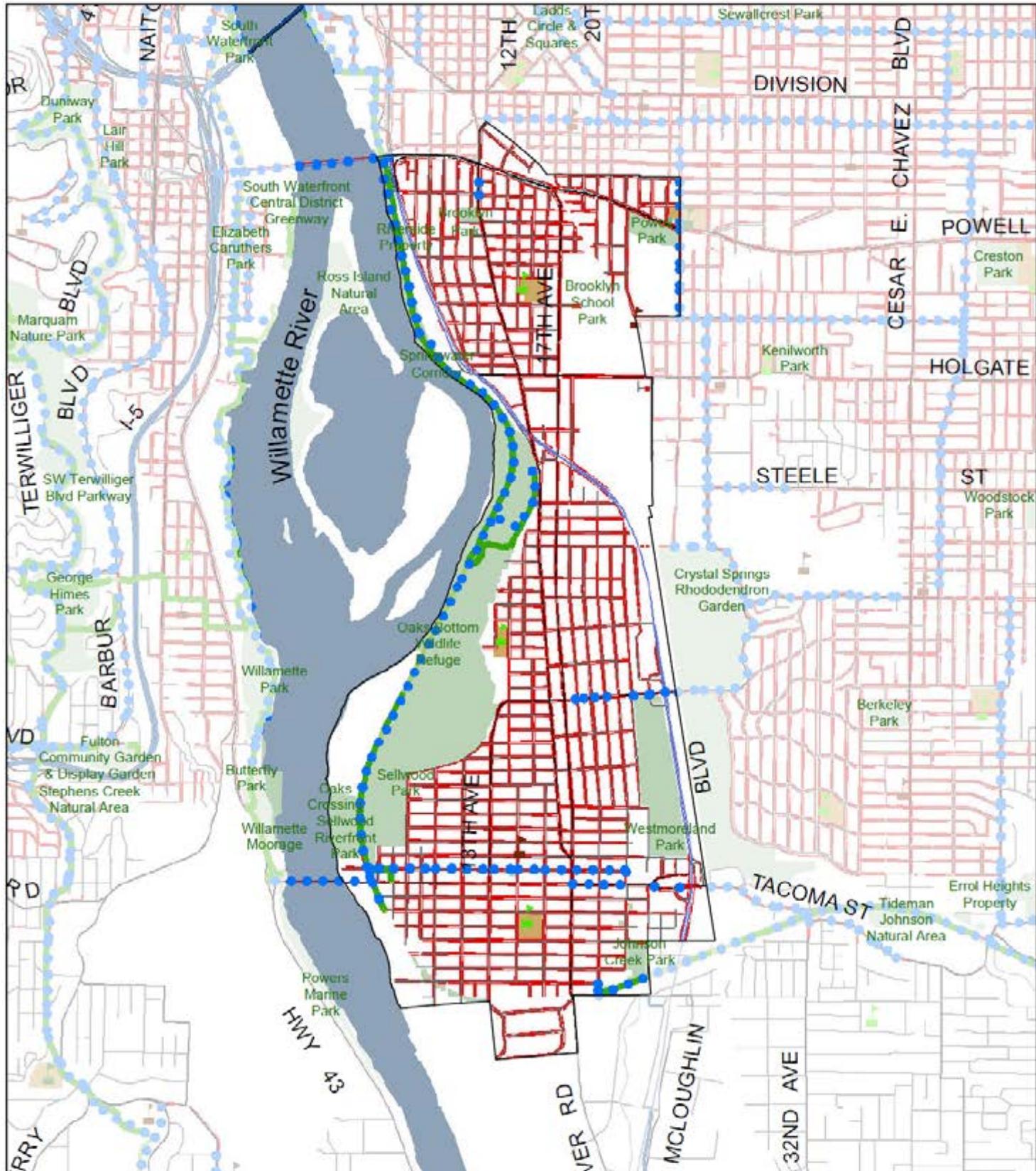


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City of Portland, Oregon  
John Rogers, Mayor • Stacey Anderson, Director

# Sellwood-Moreland-Brooklyn Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet

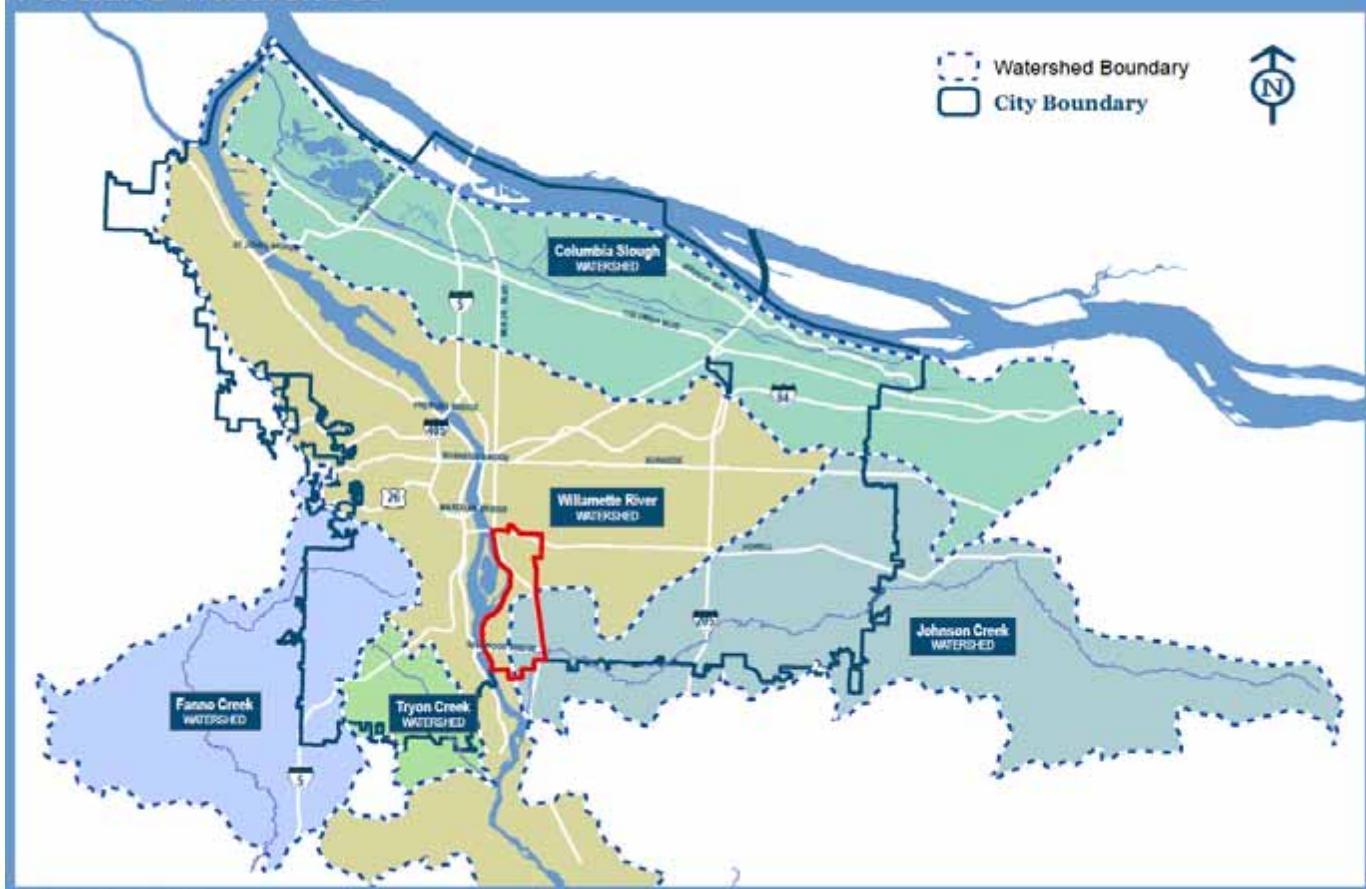


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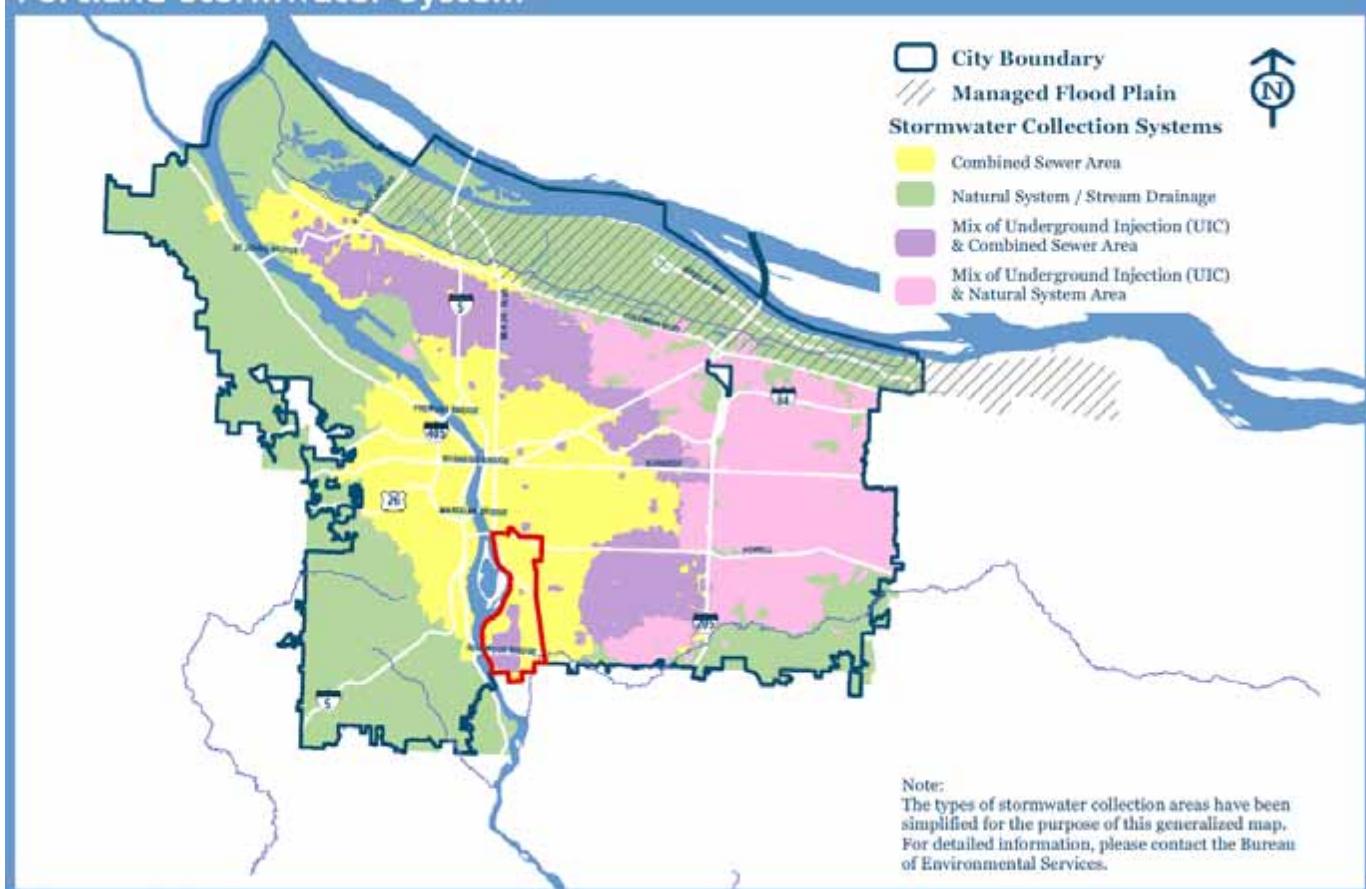


City of Portland, Oregon  
Tom Adams, Mayor • Sam Adams, Director

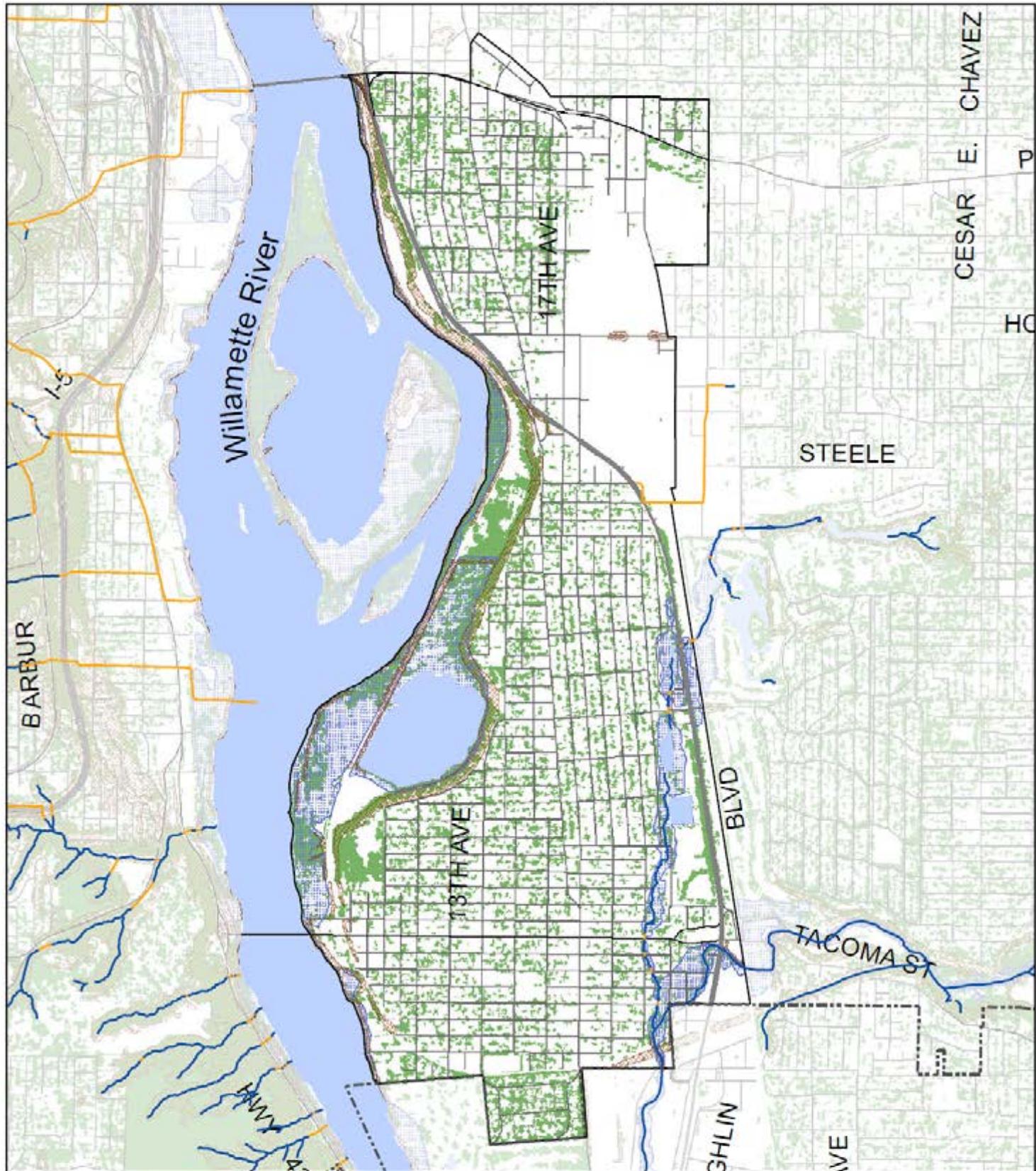
## Portland Watersheds



## Portland Stormwater System



# Sellwood-Moreland-Brooklyn Analysis Area

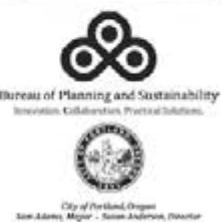


## Watersheds and Natural Features

- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



August 9, 2011

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City of Portland Bureau of Planning and Sustainability

12-9

# Sellwood-Moreland-Brooklyn Analysis Area

## Demographics (2000 – 2010)

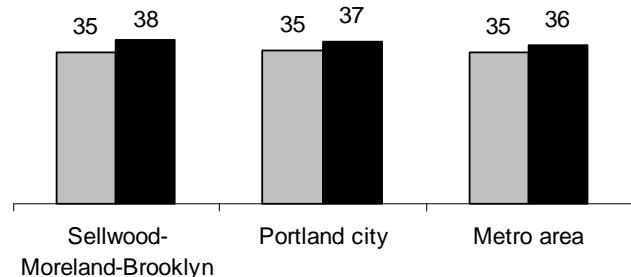
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

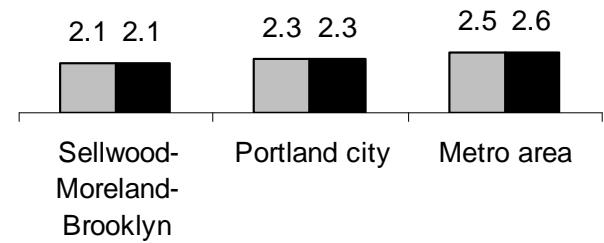
	Sellwood-Moreland-Brooklyn	Portland city	Metro area
2010	15,349	583,776	2,226,009
2000	14,448	529,121	1,927,881
% change	6%	10%	15%

■ 2000 ■ 2010

### Median Age

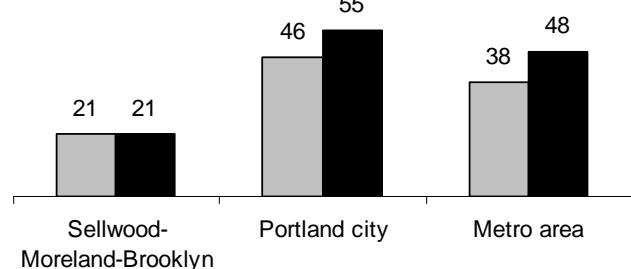


### Average Household Size

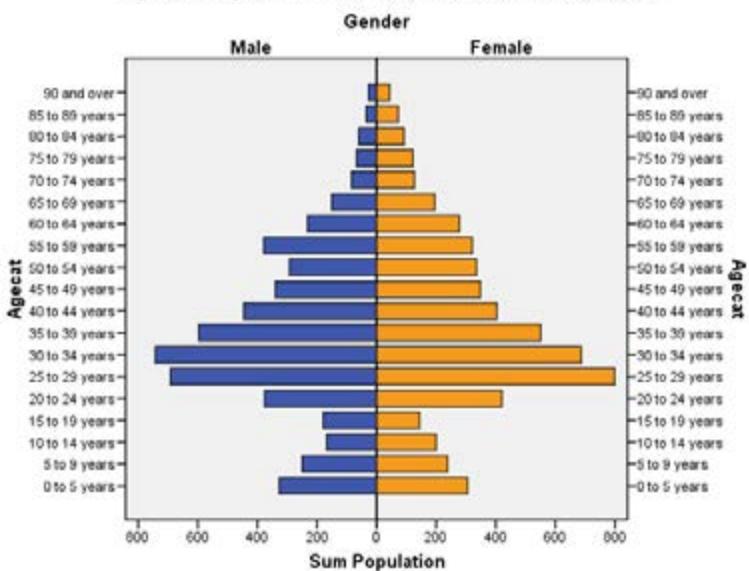


### Diversity Index

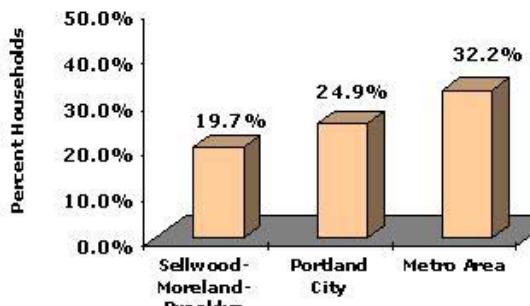
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



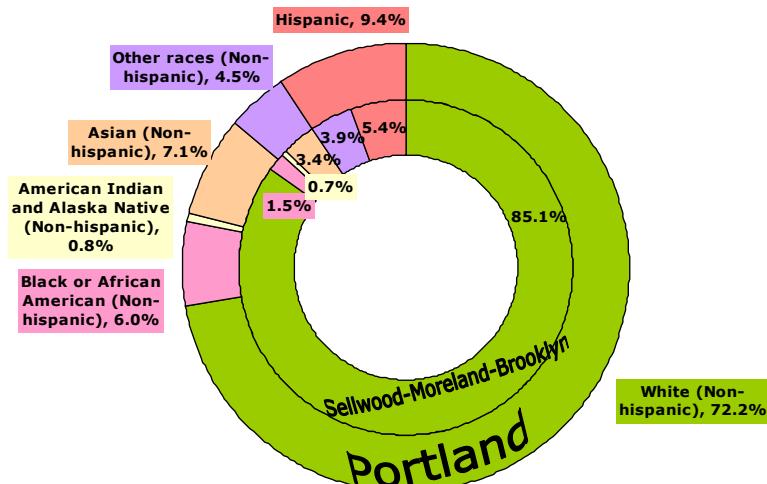
Population Pyramid for Sellwood-Moreland-Brooklyn, 2010



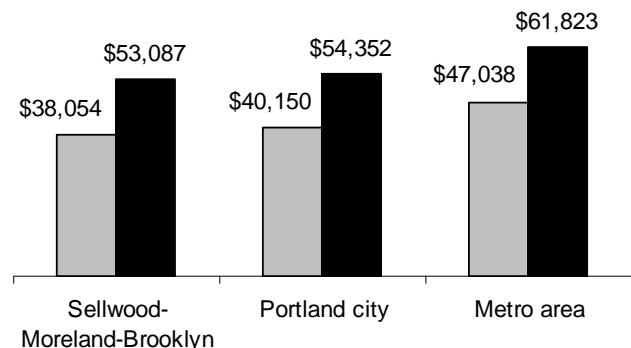
Households with Children Under 18 Years: 2010



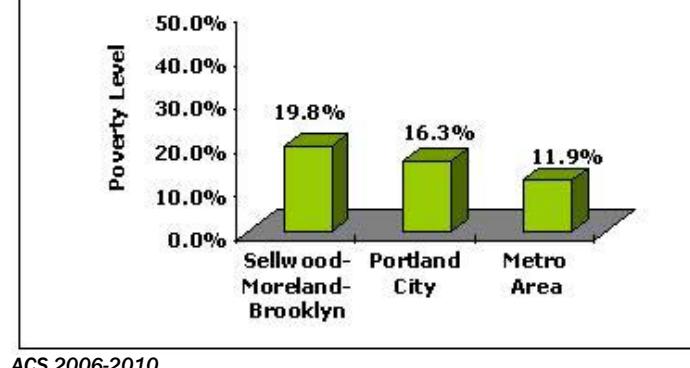
Racial and Ethnic Distribution in Portland vs. Sellwood-Moreland-Brooklyn



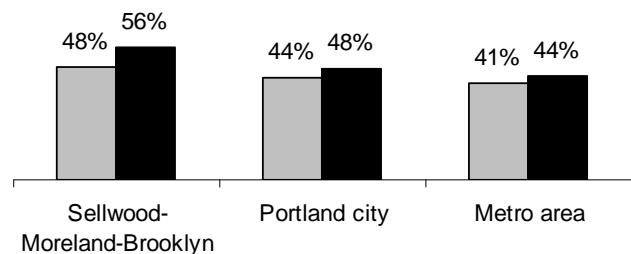
## Median Household Income



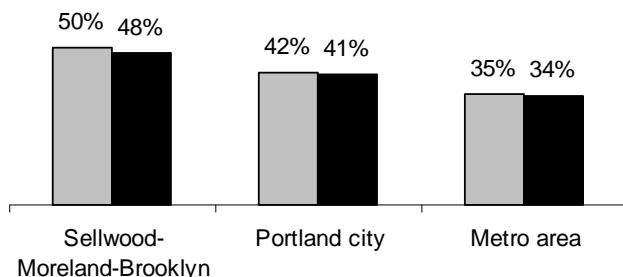
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Sellwood- Moreland- Brooklyn	Portland city	Metro area
2010	\$284,198	\$253,184	\$273,500
2000	\$170,779	\$154,721	\$168,347
% change	66.4%	63.6%	62.5%

# Sellwood-Moreland-Brooklyn Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

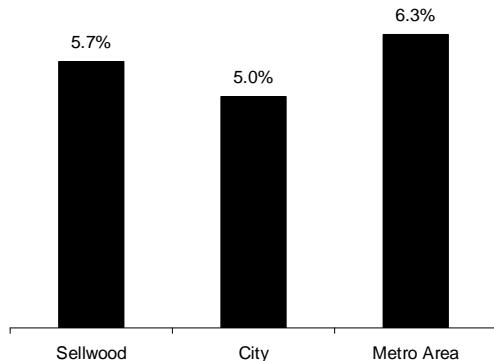
Sellwood	City	Metro Area
762,761	51,937,895	107,875,146

### OFFICE SPACE

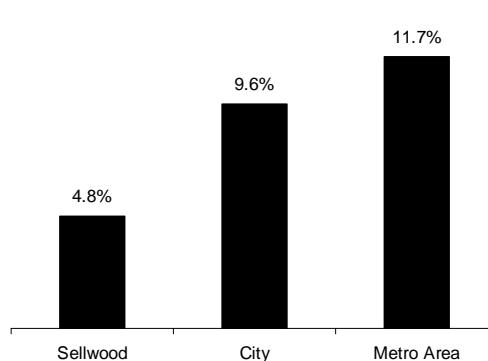
#### Square Feet

Sellwood	City	Metro Area
1,039,896	54,348,765	92,465,455

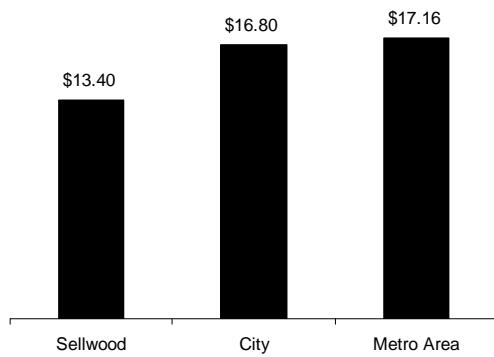
#### Retail Vacancy



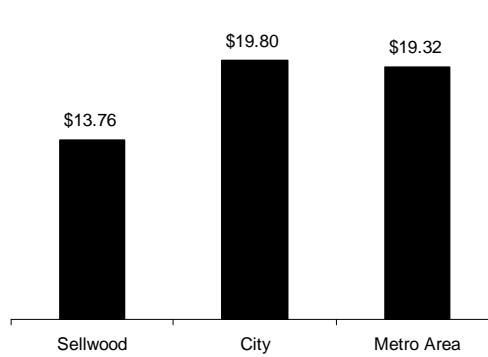
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Sellwood-Moreland-Brooklyn Analysis Area

## Retail Market Profile

**Retail Gap = \$35 million**

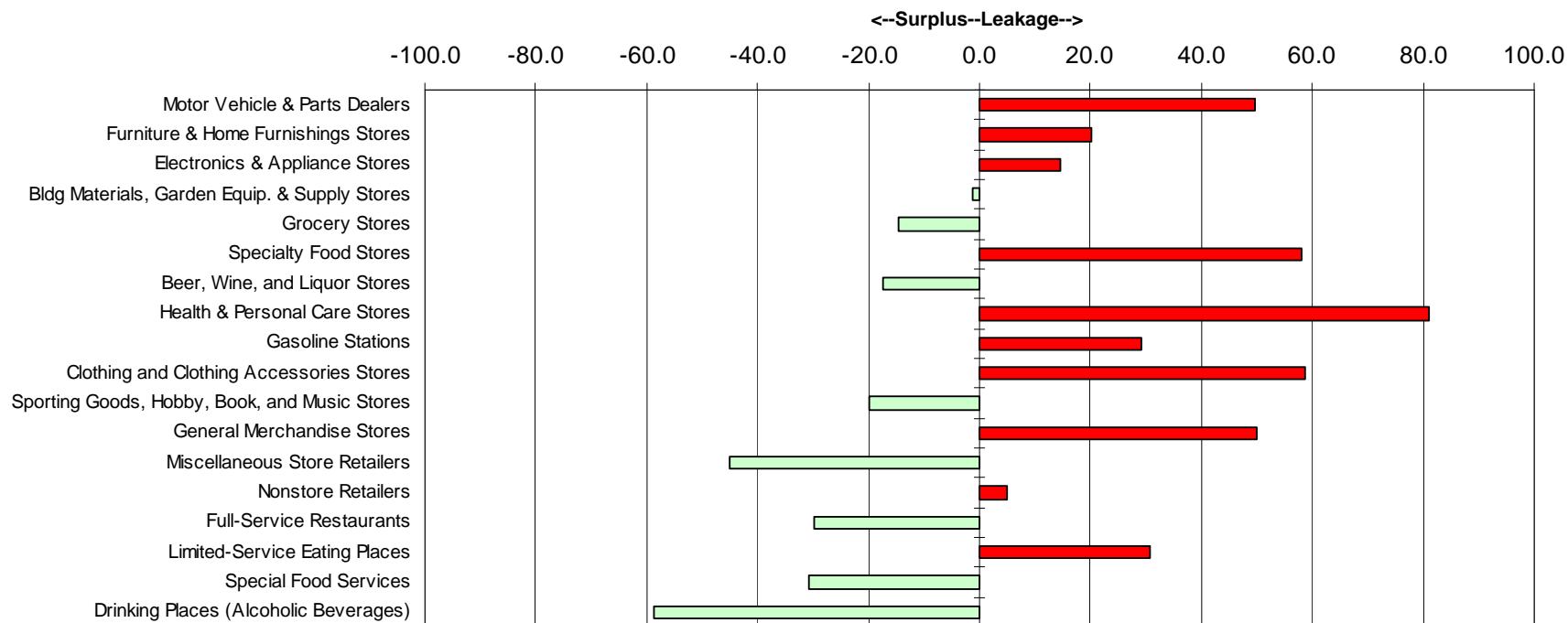
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$179,738,780	\$145,235,121	\$34,503,659	10.6	210
Total Retail Trade (NAICS 44-45)	\$153,231,787	\$106,744,661	\$46,487,126	17.9	137
Total Food & Drink (NAICS 722)	\$26,506,993	\$38,490,460	-\$11,983,467	-18.4	73

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Sellwood-Moreland-Brooklyn Analysis Area

## Employment

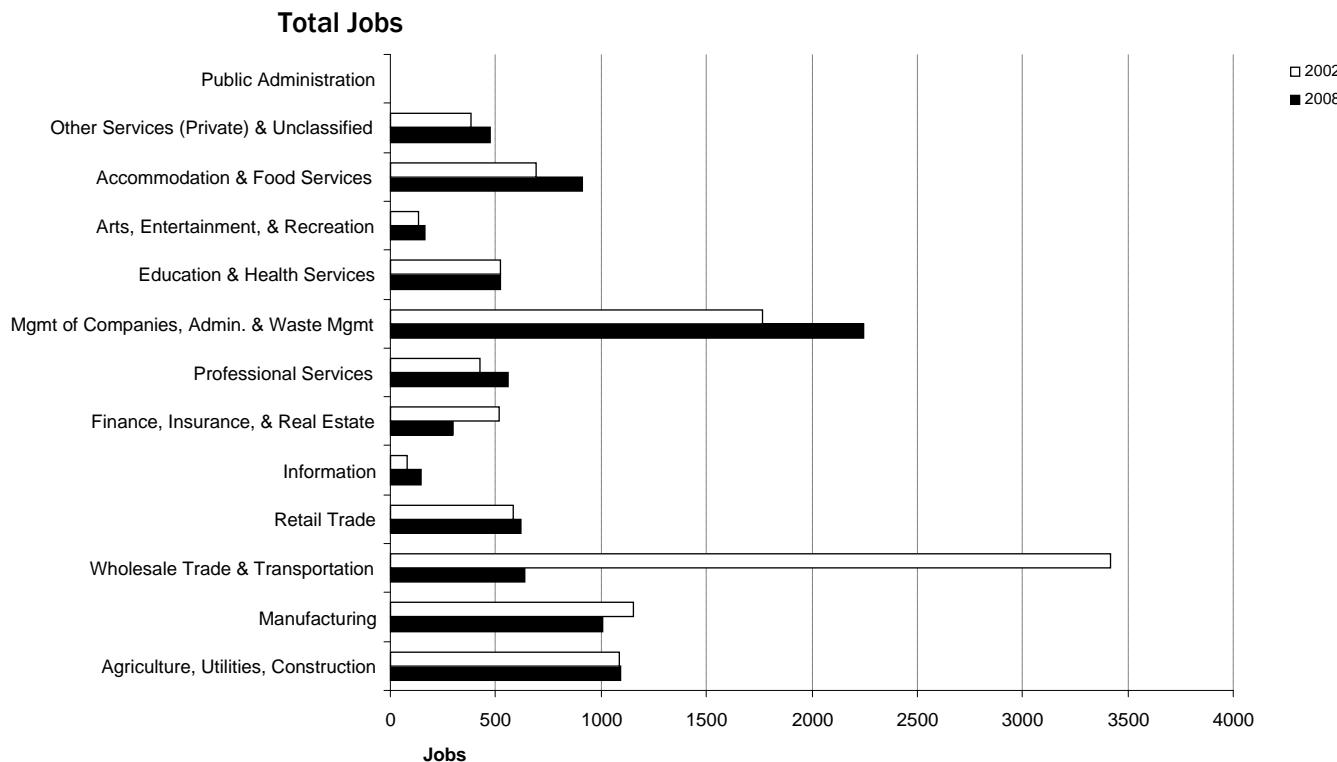
Quarterly Census of Employment and Wages data for 2002 & 2008

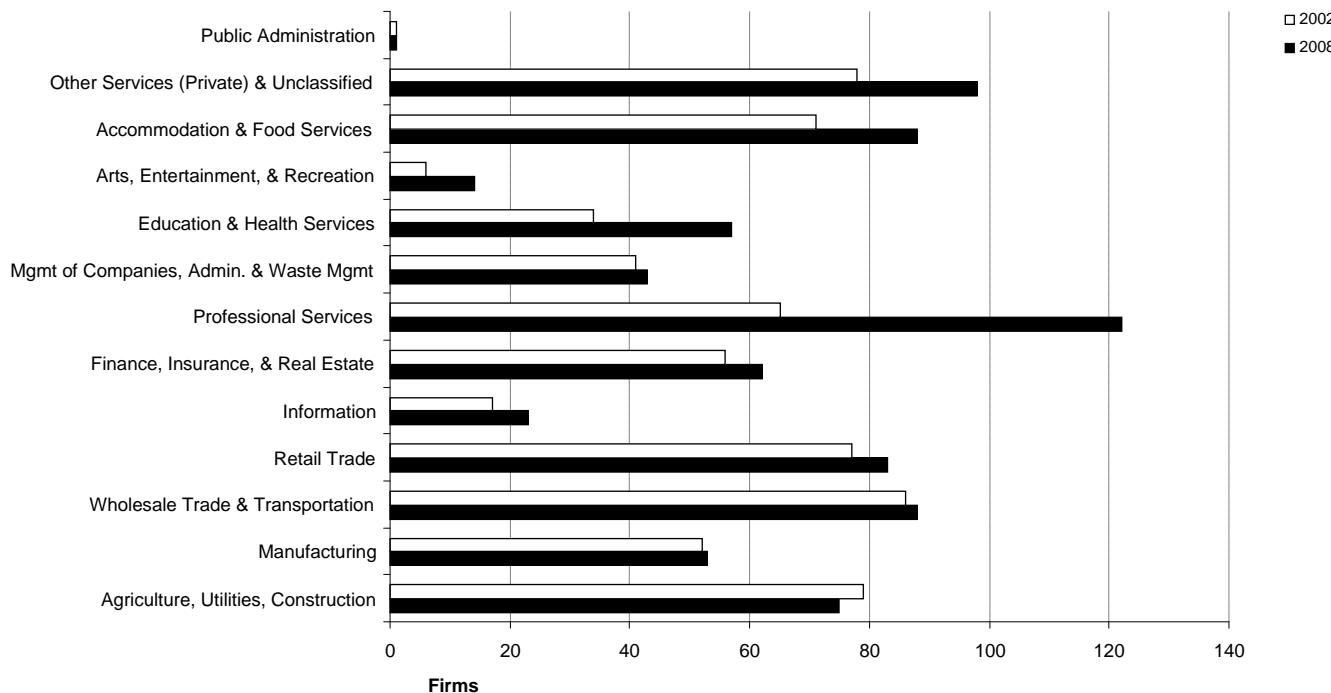
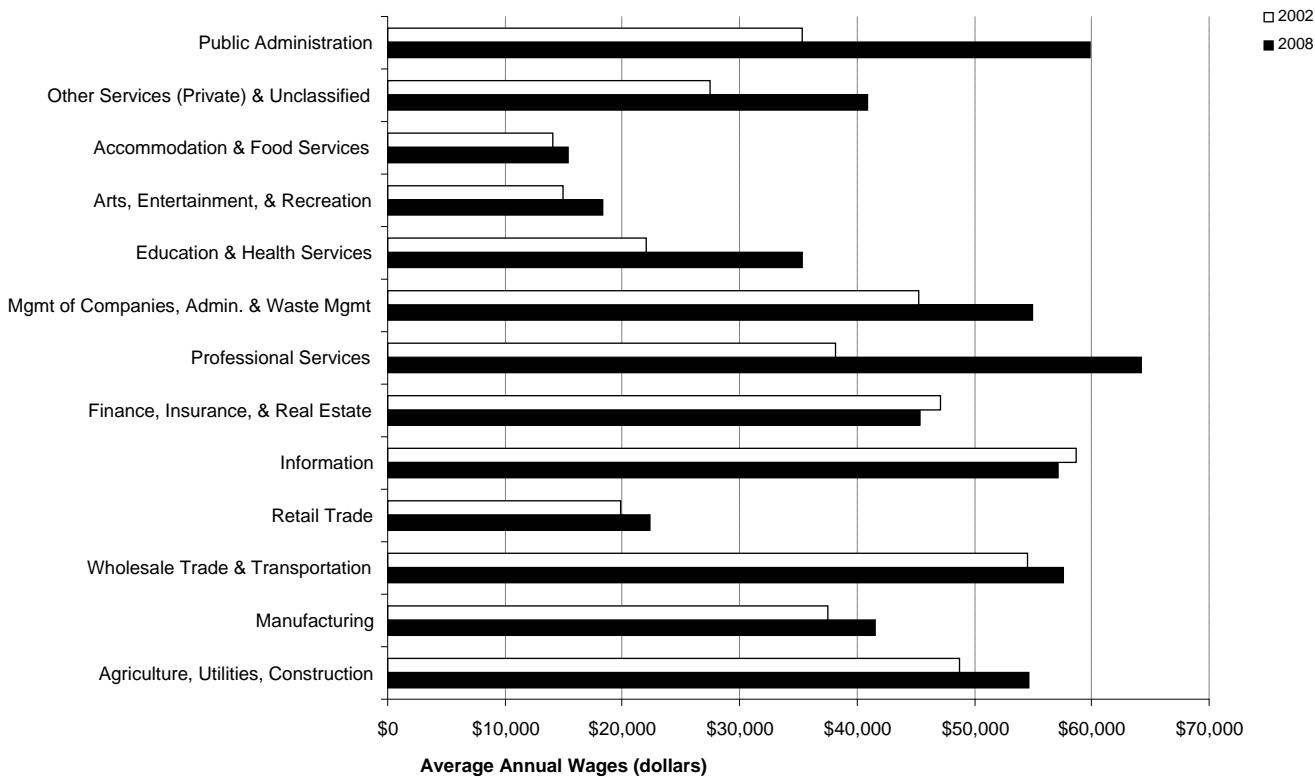
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	10,752	8,683	- 2,069
Total Firms	663	807	+144
Average Annual Wages	\$43,653	\$45,759	+2,106



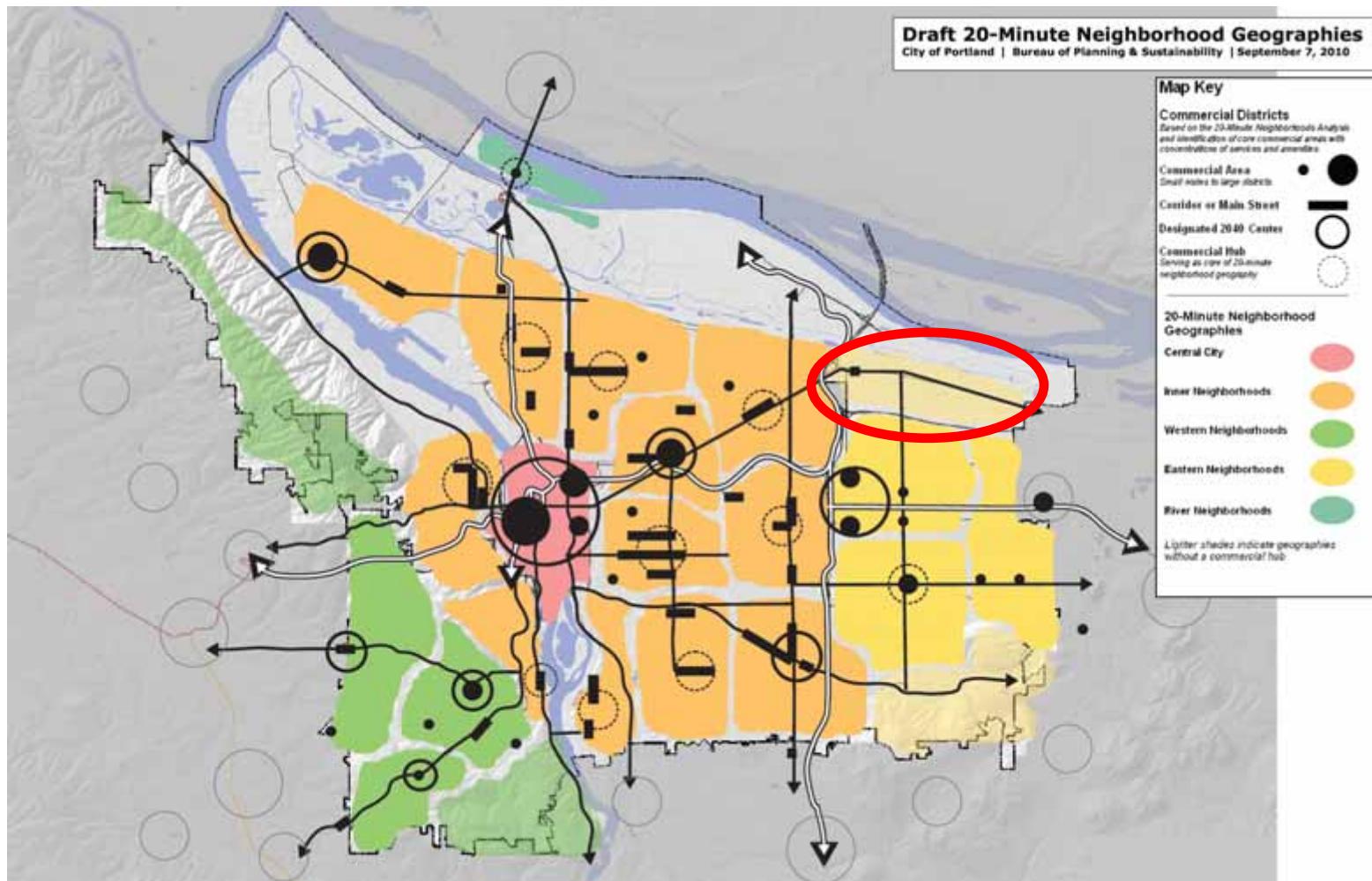
**Total Firms****Average Annual Wages**



## Parkrose-Argay Analysis Area

Including Parkrose, Argay, and part of the Wilkes neighborhood

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Parkrose-Argay Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 13,800 people (5,400 households)  
Land Area: 2.3 sq. miles (6,000 people per sq. mile)*

The area's largest concentration of commercial services is located along NE Sandy, between 102<sup>nd</sup> and 122<sup>nd</sup> Avenues. There are smaller concentrations of commercial services on 122<sup>nd</sup> Avenue, and other commercial services are located outside the analysis area around Airport Way.

**Grocery stores:** None

**Retail gap:** \$49 million surplus (*amount of estimated yearly retail sales that is beyond what the analysis area population be expected to support, indicating the regional market of the area's retail*)

## Community Amenities

### Proximity to Services and Amenities

#### Percentage of population:

Within 1/2 mile of a park*:	82%
Within 1/2 mile of a public elementary school:	25%
Within 3 miles of a full-service community center*:	12%
Within 1/2 mile of a full-service grocery store:	0%
Within 1/4 mile of a frequent service transit stop:	1%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** None

**Parks and Open Spaces:** 89 acres – including Argay Park, Wilkes Park, and the Columbia Slough Natural Area.

**Tree Canopy Coverage:** 17%

**Public Schools:** 1 high school (Parkrose)

3 K-8 schools (Prescott and Shaver elementary schools, Parkrose Middle School)

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** 1 (Parkrose Farmers Market)

**Transit Centers/Stations:** 1 (Parkrose/Sumner Transit Center – at western edge of analysis area)

**Walkable Access Score:** 32 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

## Neighborhood and Business Associations

**Neighborhood Associations:** Parkrose, Argay, and part of Wilkes

**Business Associations:** Parkrose Business Association

## Urban Form Characteristics

Residential areas to the west of 122<sup>nd</sup> Avenue have a mix of rectilinear blocks of various sizes, with most streets lacking sidewalks. Residential areas east of 122<sup>nd</sup> Avenue feature curvilinear post-war suburban development patterns, with sidewalks on most streets. The area's primary commercial corridor along Sandy Boulevard includes a mix of auto-oriented development with surface parking lots and traditional main street areas with street-fronting buildings. Prominent natural features include Wilkes Creek, the Columbia Slough to the north, while Rocky Butte is a prominent feature to the west. Agricultural fields occupy portions of the area.

**Access issues.** The area lacks good street connectivity and some areas lack sidewalks, limiting pedestrian access to the area's commercial services, which do not include any grocery stores. Limited access to transit, with the area's only frequent service transit stop (light rail) located beyond walking distance for most residents. Access to adjacent areas is limited by the I-205 and I-84 freeways to the west and south, while industrial areas and the Columbia Slough border the area to the north.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	.6 mile (Sandy)
Station Communities:	1

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	632	58%	108
Multi-Family Residential:	300	27%	109
Commercial/Mixed-Use:	133	12%	100
Employment:	2	.2%	1
Industrial:	8	.7%	3
Open Space:	24	2%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

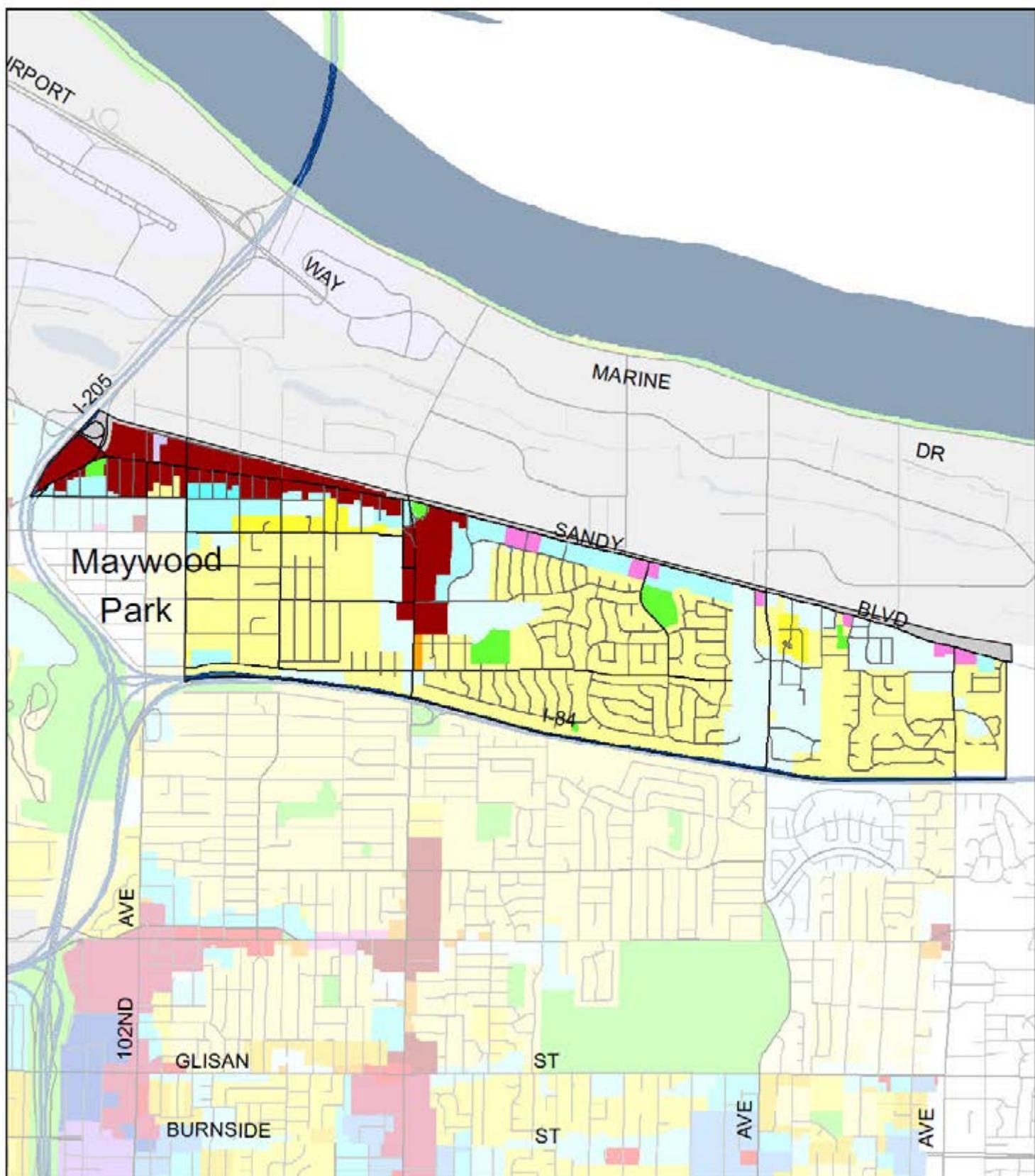
2010 Housing Units (Census):	5,691
2035 Housing Units:	7,700

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Parkrose-Argay Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000  
Feet

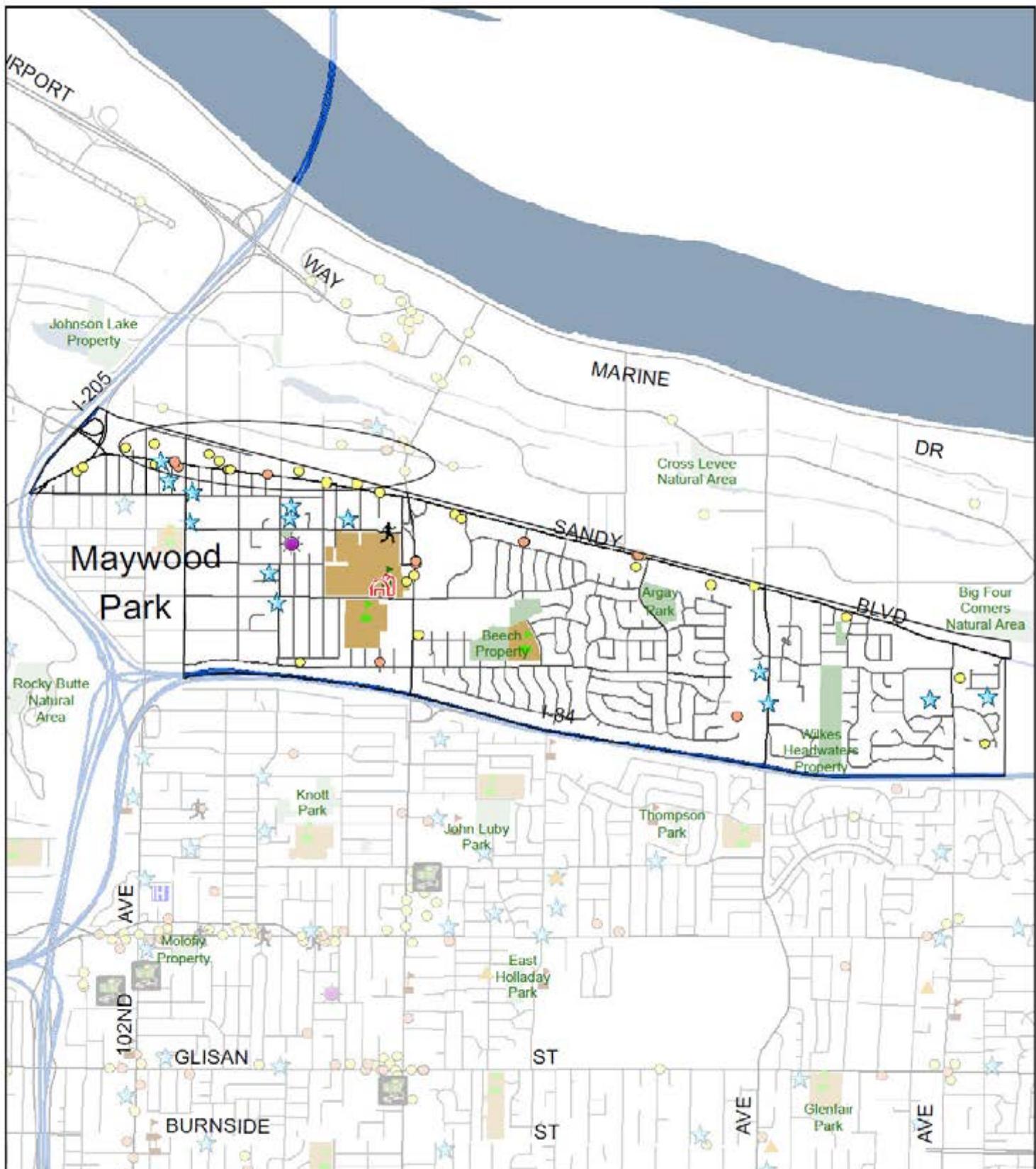


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City of Portland, Oregon  
Sam Adams, Mayor • Jensen Anderson, Director

# Parkrose-Argay Analysis Area



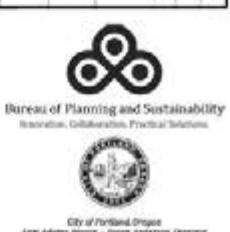
## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

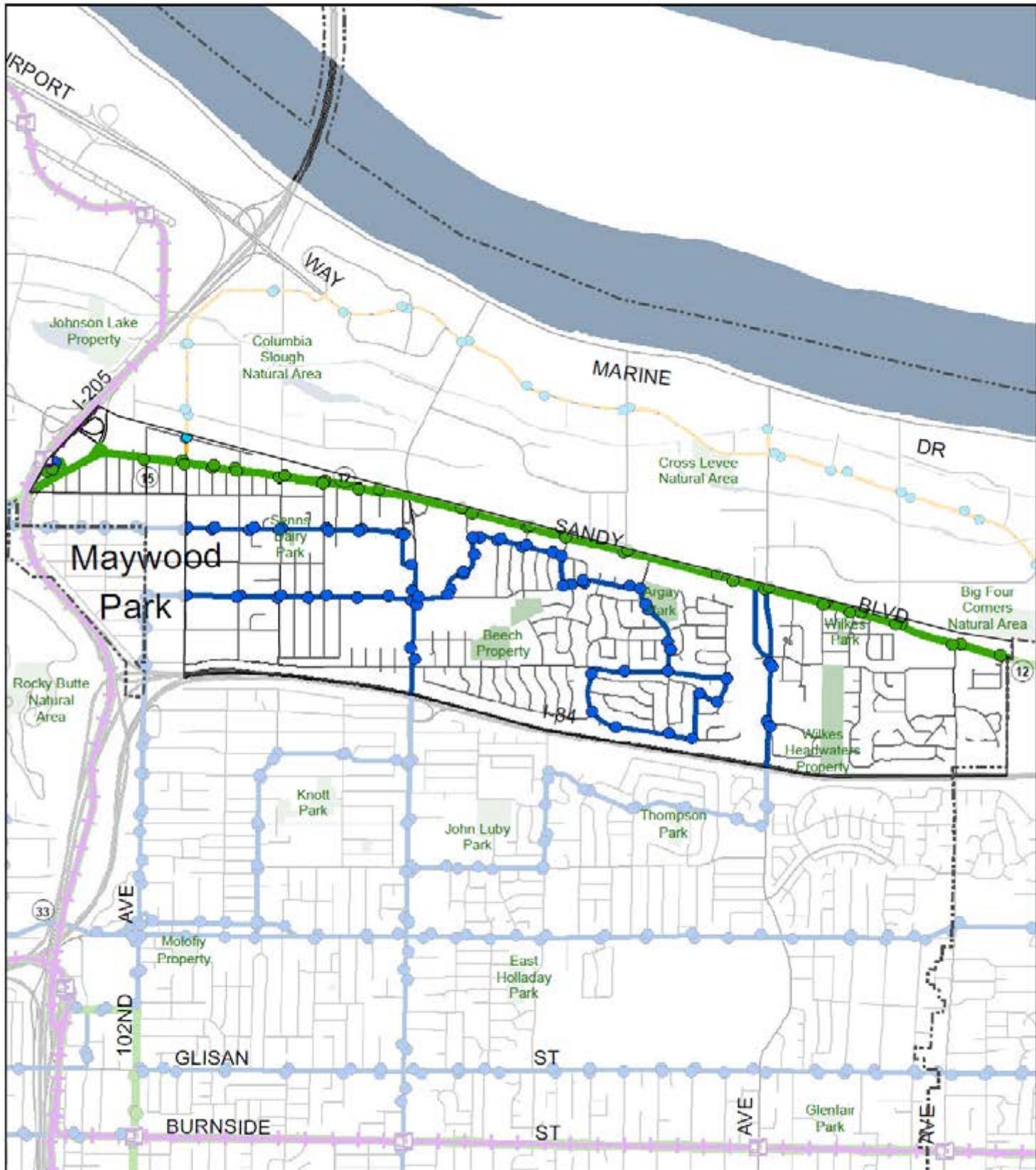
- |                     |                       |                 |
|---------------------|-----------------------|-----------------|
| Type 1 Commercial   | Libraries             | Preschools      |
| Type 2 Commercial   |                       |                 |
| Commercial Clusters |                       |                 |
| Fitness Centers     | Farmer's Markets      | Daycare Centers |
| Grocery Stores      |                       | Public HS       |
| Places of Worship   | Community Gardens     | Public K-8      |
|                     |                       | Private Schools |
|                     | Community Centers     |                 |
|                     | County Health Clinic  |                 |
|                     | County Aging Services |                 |



0 1,000 2,000 3,000 Feet



# Parkrose-Argay Analysis Area



## Transit Infrastructure

February 1, 2012

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	Light Rail Stops	Bus Stops
MAX	MAX	Frequent Stops
Street Car	Street Car	Standard Stops
MAX	MAX	Rush Hour Stops
Streetcar	Streetcar	
		<b>Standard Service</b>
		<b>Rush Hour Only Service</b>
		<b>City Boundary</b>



0 1,000 2,000 3,000  
Feet

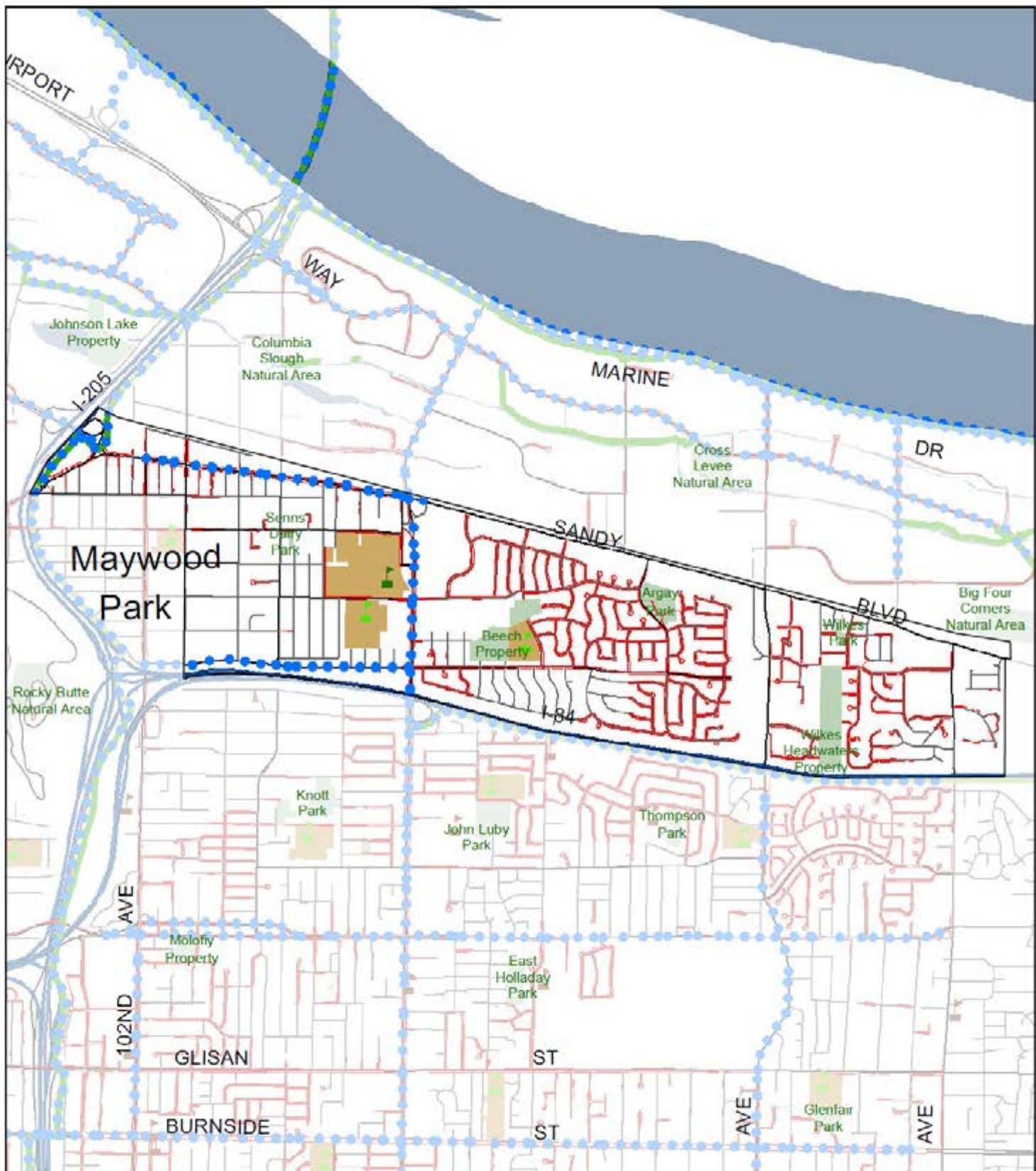


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City of Portland, Oregon  
John Adams, Mayor • Jason Anderson, Director

# Parkrose-Argay Analysis Area



## Sidewalks and Bicycle Infrastructure

February 1, 2012

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet

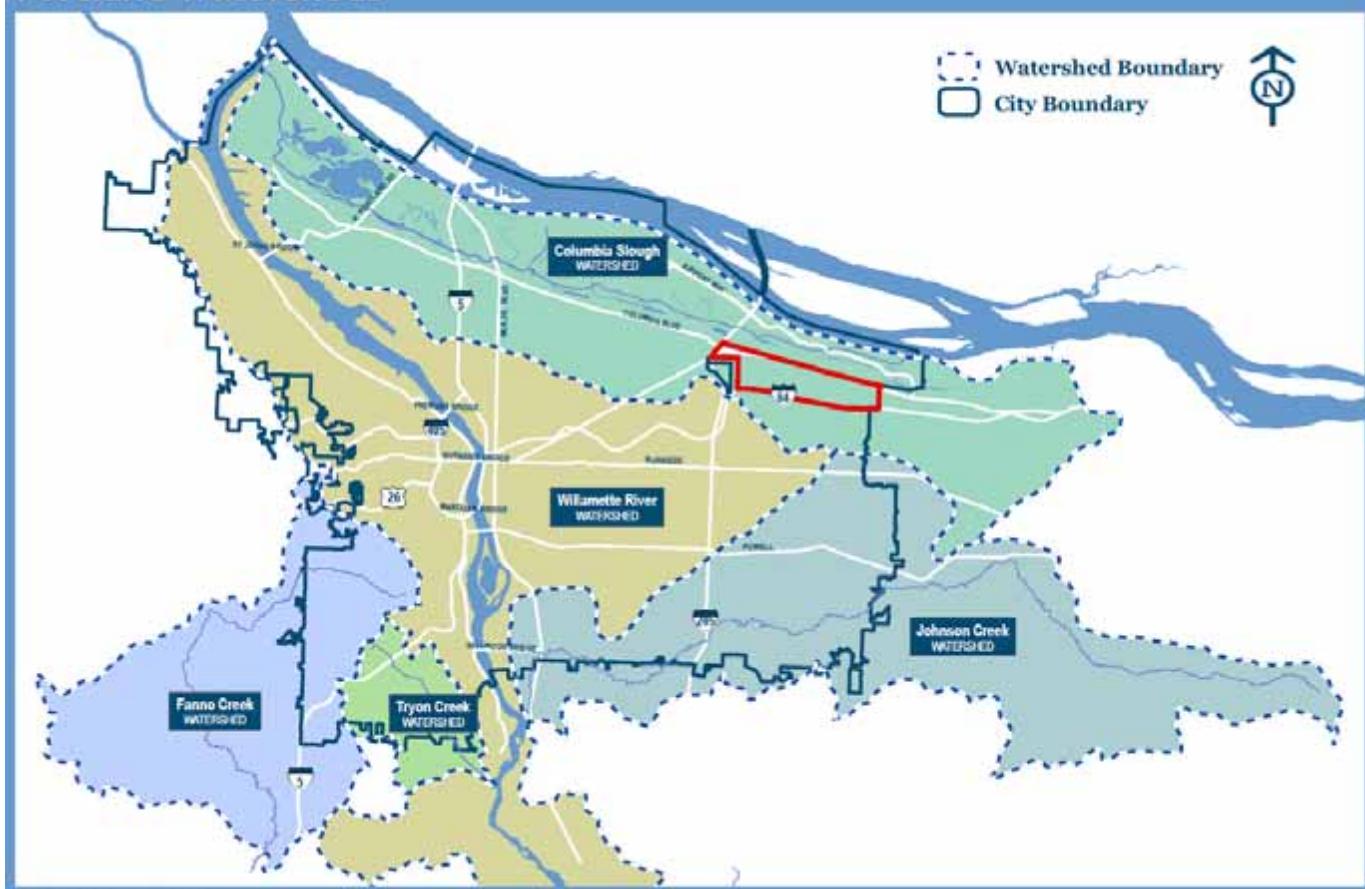


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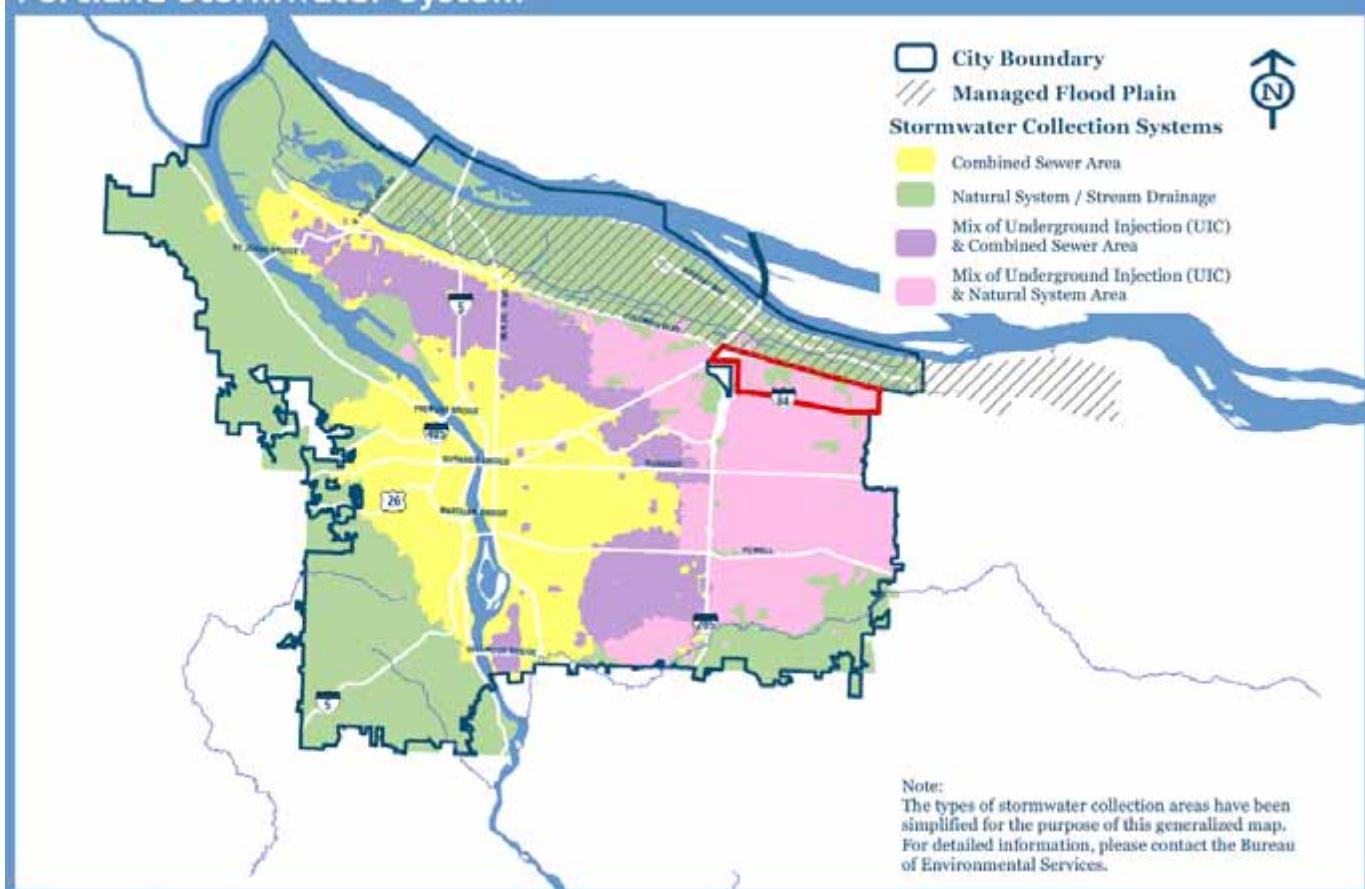


City of Portland, Oregon  
Sam Adams, Mayor • Jason Anderson, Director

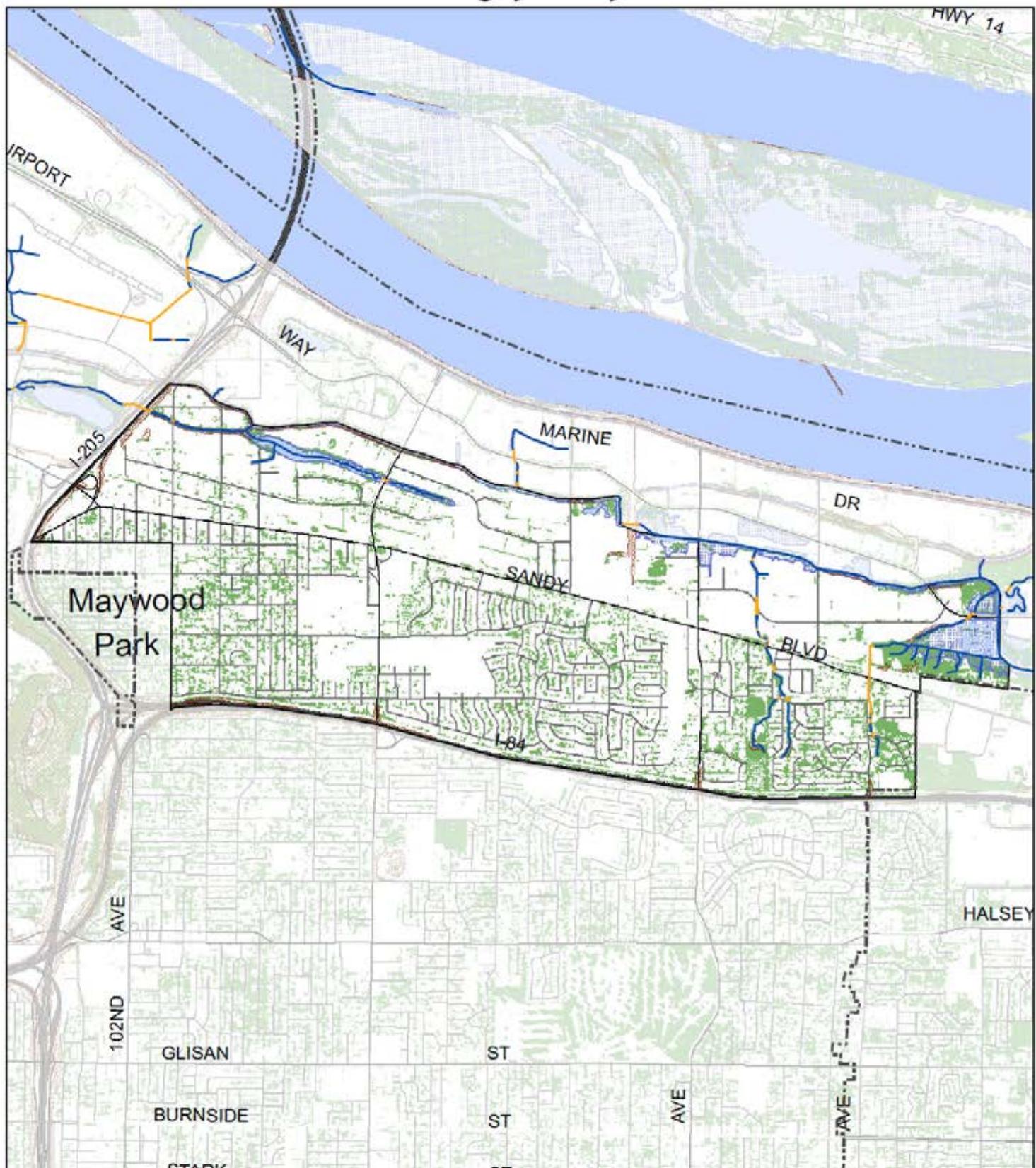
## Portland Watersheds



## Portland Stormwater System



# Parkrose-Argay Analysis Area



## Watersheds and Natural Features

- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000  
Feet



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City of Portland, Oregon  
Sam Adams, Mayor - Steven Anderson, Director

August 9, 2011

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# Parkrose-Argay Analysis Area

## Demographics (2000 – 2010)

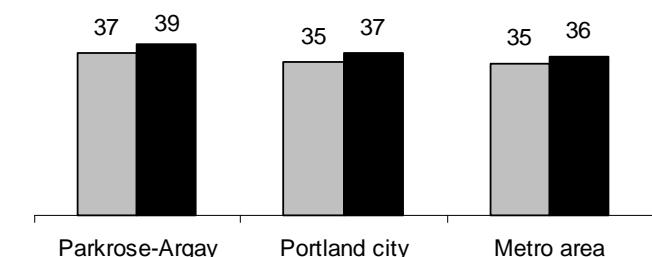
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

	Parkrose- Argay	Portland city	Metro area
2010	13,753	583,776	2,226,009
2000	12,031	529,121	1,927,881
% change	14%	10%	15%

■ 2000 ■ 2010

### Median Age

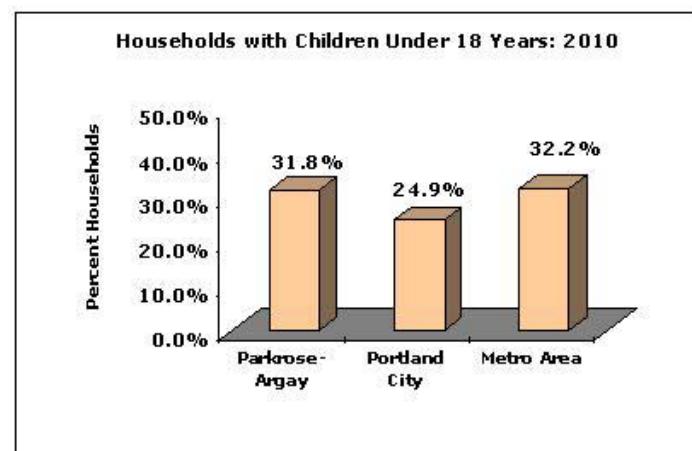
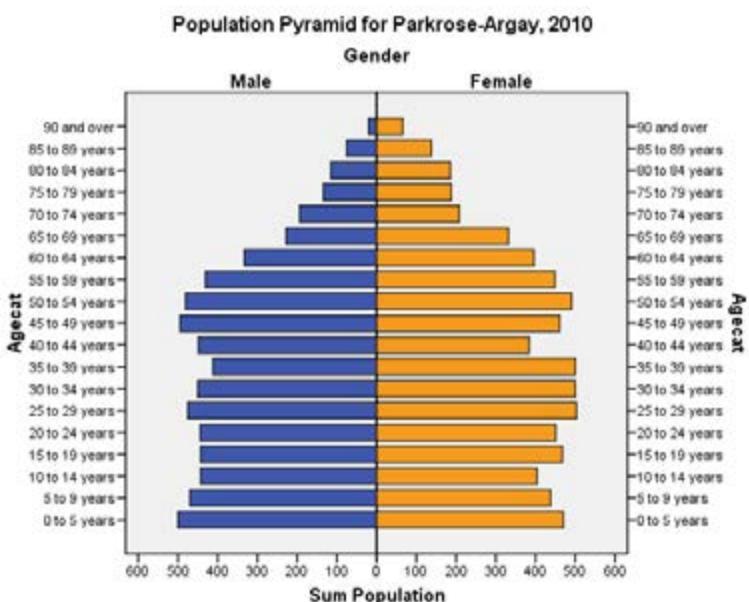
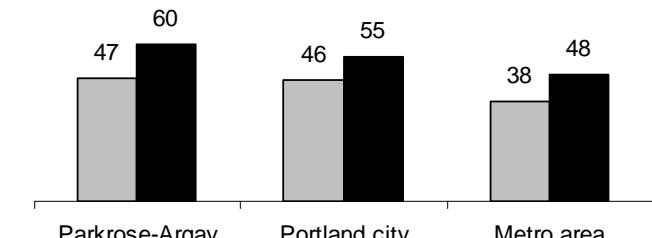


### Average Household Size

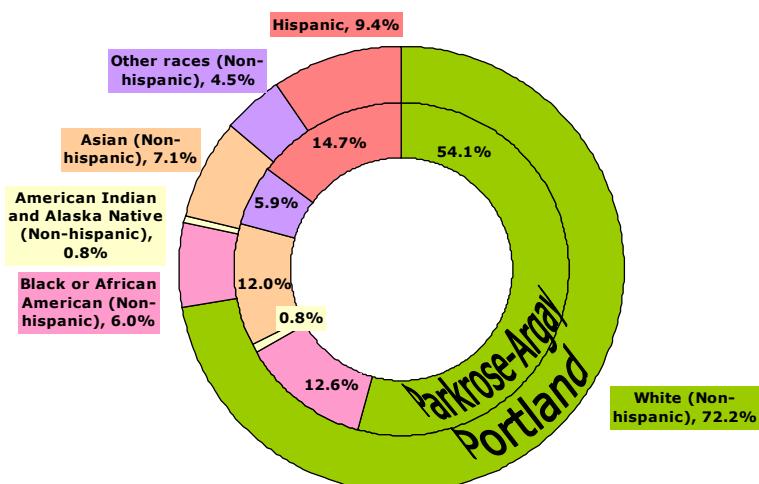


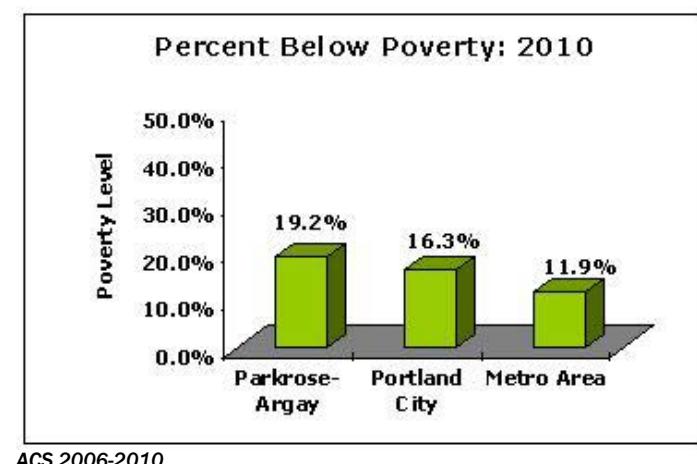
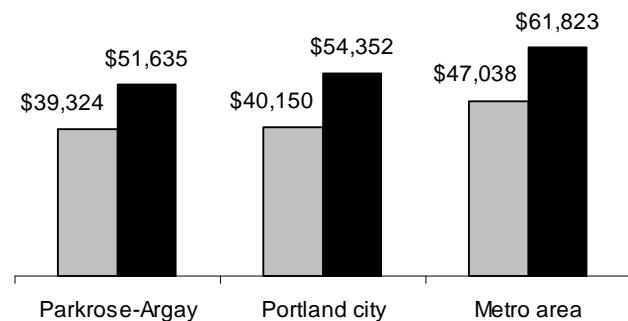
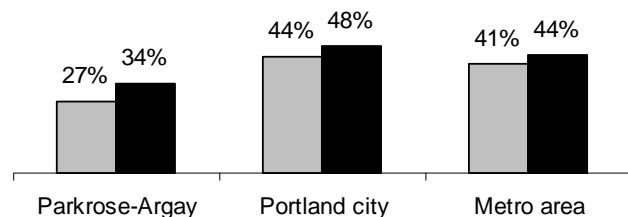
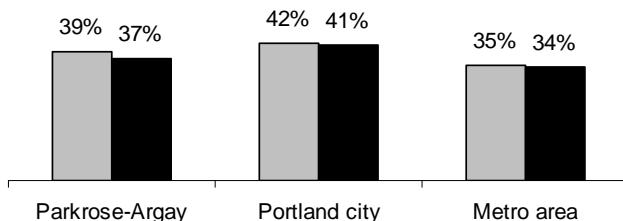
### Diversity Index

(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



### Racial and Ethnic Distribution in Portland vs. Parkrose-Argay



**Median Household Income****Percent College Graduates****Percent Renters of Occupied Housing Units****Median Home Value**

	Parkrose-Argay	Portland city	Metro area
2010	\$270,425	\$253,184	\$273,500
2000	\$163,771	\$154,721	\$168,347
% change	65.1%	63.6%	62.5%

# Parkrose-Argay Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

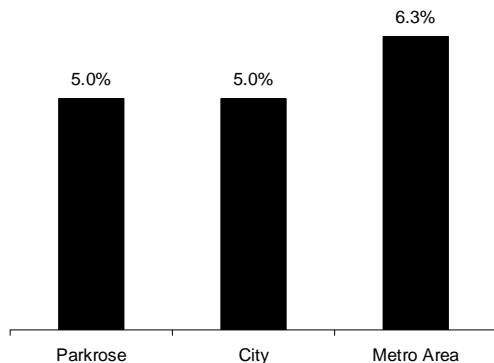
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### OFFICE SPACE

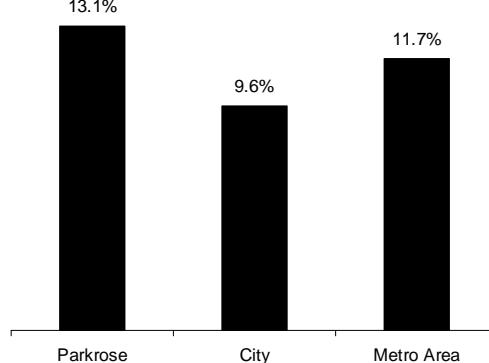
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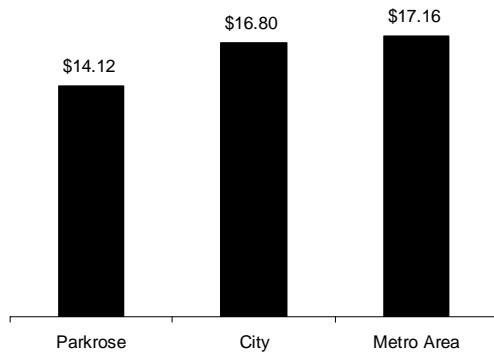
#### Retail Vacancy



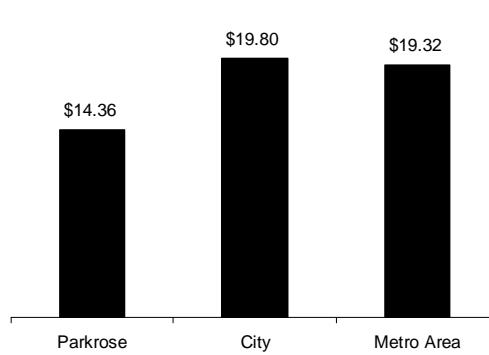
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Parkrose-Argay Analysis Area

## Retail Market Profile

**Retail Gap = \$49 million (surplus)**

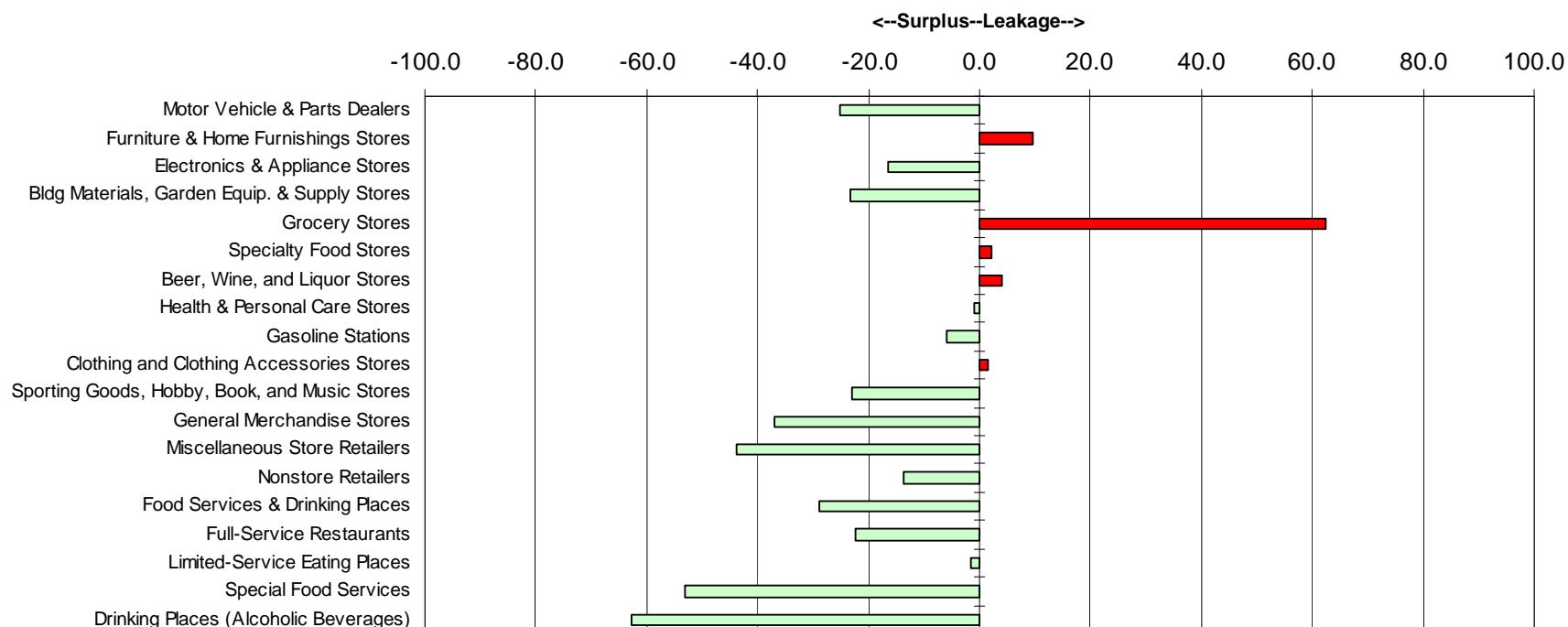
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$137,283,133	\$186,249,340	-\$48,966,207	-15.1	156
Total Retail Trade (NAICS 44-45)	\$117,419,312	\$150,263,819	-\$32,844,507	-12.3	108
Total Food & Drink (NAICS 722)	\$19,863,821	\$35,985,521	-\$16,121,700	-28.9	48

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Parkrose-Argay Analysis Area

## Employment

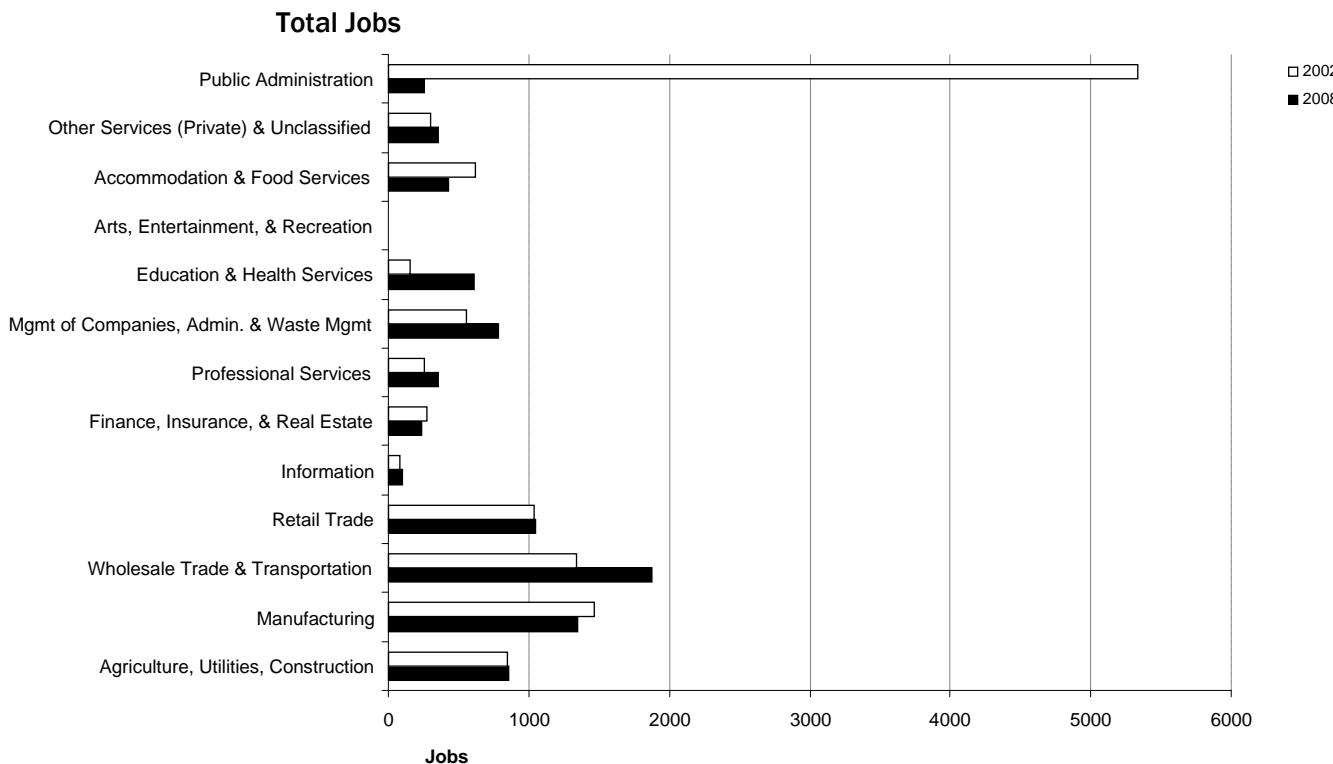
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

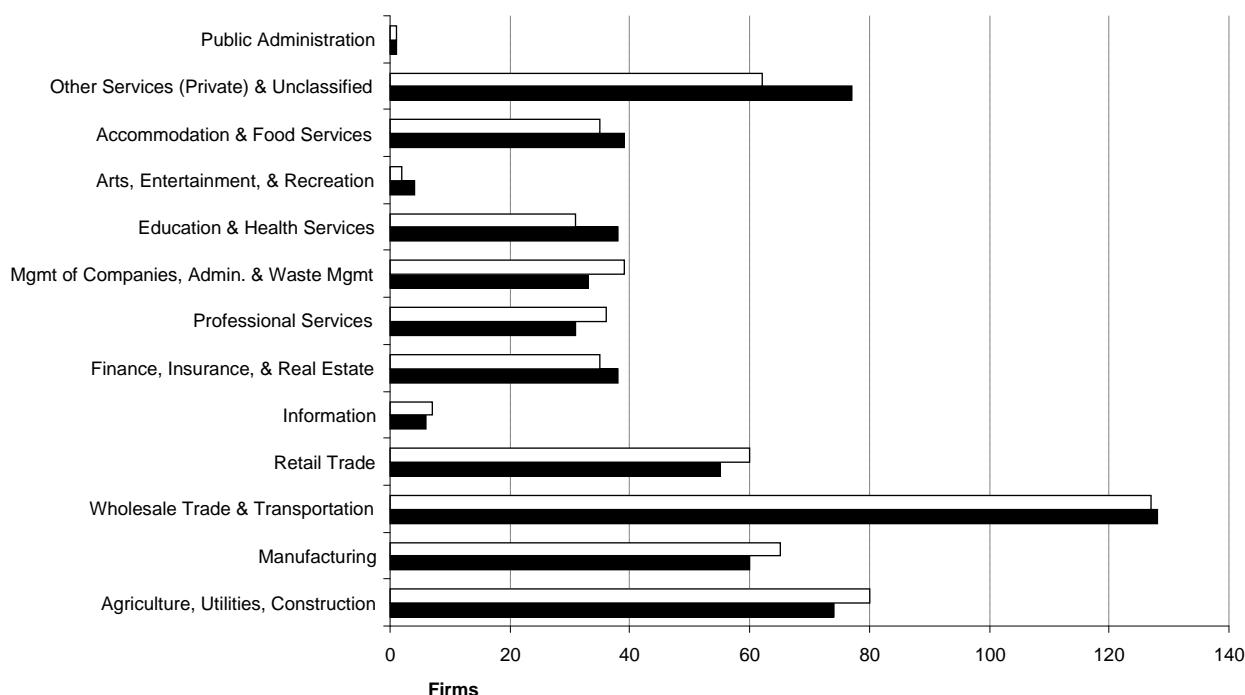
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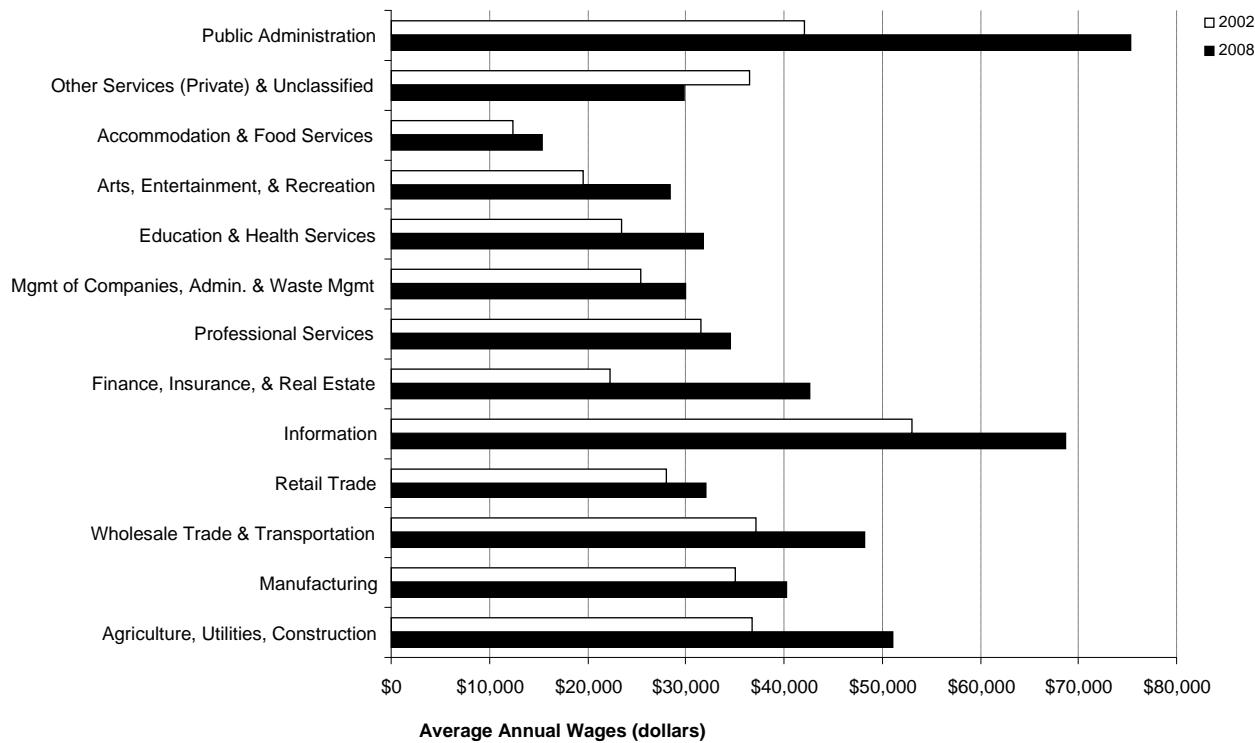
	2002	2008	change
Total Jobs	12,280	8,251	- 4,029
Total Firms	580	584	+4
Average Annual Wages	\$35,902	\$40,255	+4,323



### Total Firms



### Average Annual Wages

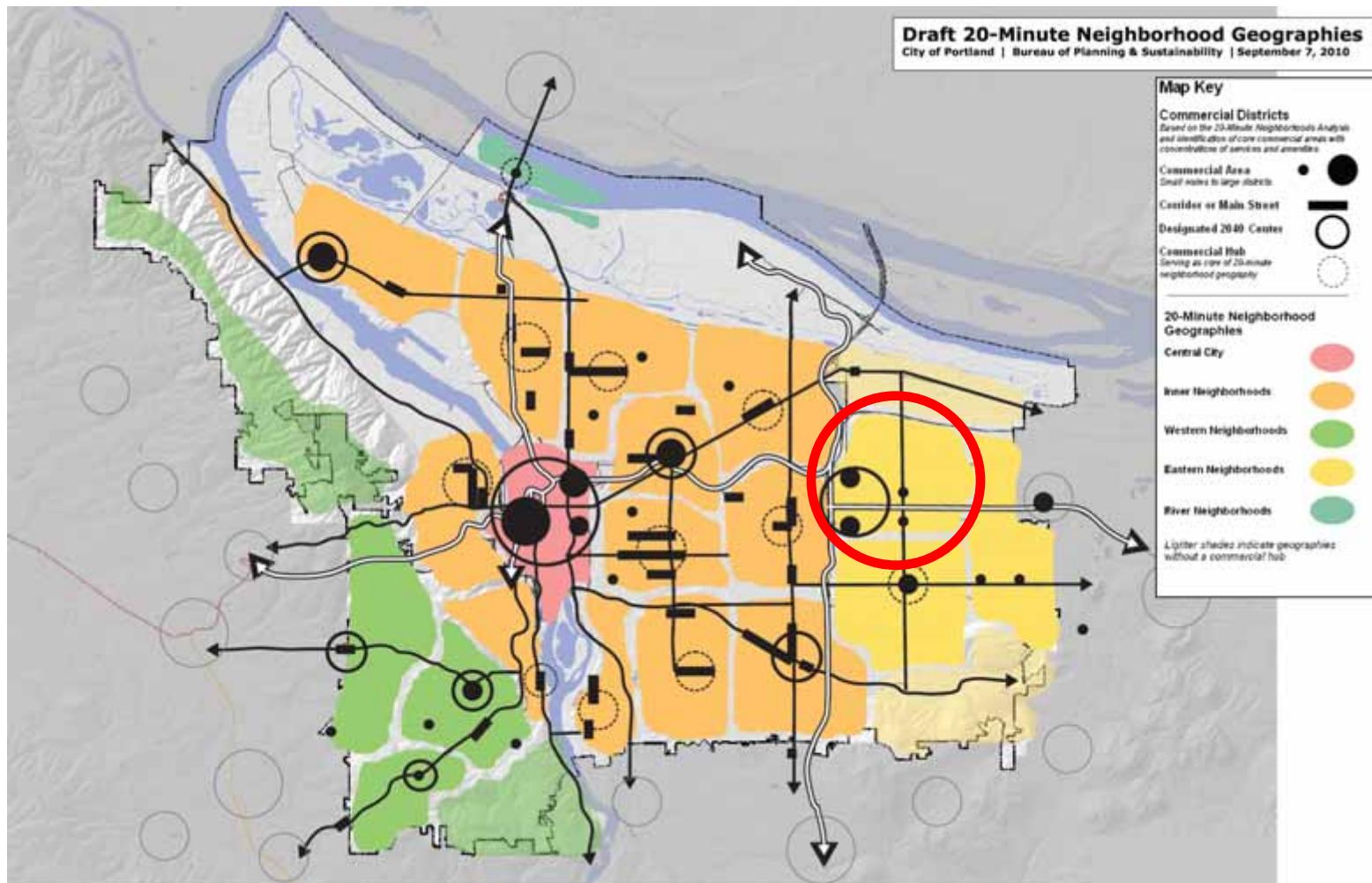




## Gateway Analysis Area

Including Hazelwood, Parkrose Heights, Russell, and part of the Mill Park neighborhood

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# Gateway Analysis Area

## Services and Amenities

*Population: 30,100 people (11,800 households)  
Land Area: 5.5 sq. miles (5,500 people per sq. mile)*

### Commercial Districts

Locations with major concentrations of commercial services include the area around and east of NE Halsey and 102<sup>nd</sup> Avenue (where the Gateway Shopping Center is located), SE Washington and SE Stark near 102<sup>nd</sup> Avenue (including Mall 205), and around NE Glisan and 122<sup>nd</sup> Avenue. There are smaller concentrations of commercial services at 122<sup>nd</sup> and NE Halsey, and at 122<sup>nd</sup> and NE Stark.

**Grocery stores:** 4 (1 store per 2,950 households)

**Retail gap:** \$301 million surplus (*amount of estimated yearly retail sales that is beyond what the analysis area population be expected to support, indicating the regional market of the area's retail*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	97%
Within 1/2 mile of a public elementary school:	24%
Within 3 miles of a full-service community center*:	98%
Within 1/2 mile of a full-service grocery store:	27%
Within 1/4 mile of a frequent service transit stop:	12%

\*Parks Bureau service standard

**Community Centers:** 1 (East Portland Community Center & Pool – full service)

**Libraries:** 1 (Midland Library)

**Parks and Open Spaces:** 296 acres – including Floyd Light, John Luby, East Holladay, Thompson, and Ventura parks.

**Tree Canopy Coverage:** 22%

**Public Schools:** 1 high school (David Douglas)

5 K-8 schools (Menlo Park, Ventura Park, Sacramento, and Russell Academy elementary schools, Floyd Light Middle School)

**Colleges (campus):** 1 specialized (Oregon College of Oriental Medicine)

**Hospitals:** 1 (Adventist Medical Center – at southwest edge of analysis area)

**Farmers Markets:** None

**Transit Centers/Stations:** 4 (Gateway Transit Center, and the E. 102<sup>nd</sup>, E. 122<sup>nd</sup>, and SE Main light rail stations)

**Walkable Access Score:** 48 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Hazelwood, Parkrose Heights, Russell, and part of Mill Park

**Business Associations:** Gateway Area Business Association

## Urban Form Characteristics

The area's primary concentrations of commercial and community services are located within the Gateway regional center. Gateway is anchored at its north and south ends by shopping centers with large areas of surface parking, with little residential population within these core commercial areas. The regional center also includes low- and mid-rise multifamily housing, while single-family housing predominates in nearby residential areas, which occupy the majority of the analysis area's land outside the commercial areas.

The area has a mix of block sizes and configurations, with large blocks predominant in commercial areas. Rocky Butte to the west, and stands of Douglas Firs in mid-block areas are defining aspects of the area's skyline.

**Access issues.** The area's large blocks provide relatively infrequent pedestrian connections. Several heavily-trafficked, multi-lane streets provide connectivity through the area, while many secondary streets lack sidewalks and there are few options for low-stress bicycle connections off of the major streets. While the area has a broad range of commercial services, these street infrastructure issues together with the small amount of housing within the core commercial areas, limits the proportion of the area's population that can conveniently access services by walking or bicycling. The area is served by three light rail lines, but most residents are beyond convenient walking distance of transit stations.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Gateway Regional Center:	645 acres
Main Streets:	1.4 miles (122 <sup>nd</sup> Avenue)
Station Communities:	4

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,545	55%	287
Multi-Family Residential:	519	19%	224
Commercial/Mixed-Use:	424	15%	243
Employment:	0	0%	0
Industrial:	0	0%	0
Open Space:	303	11%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

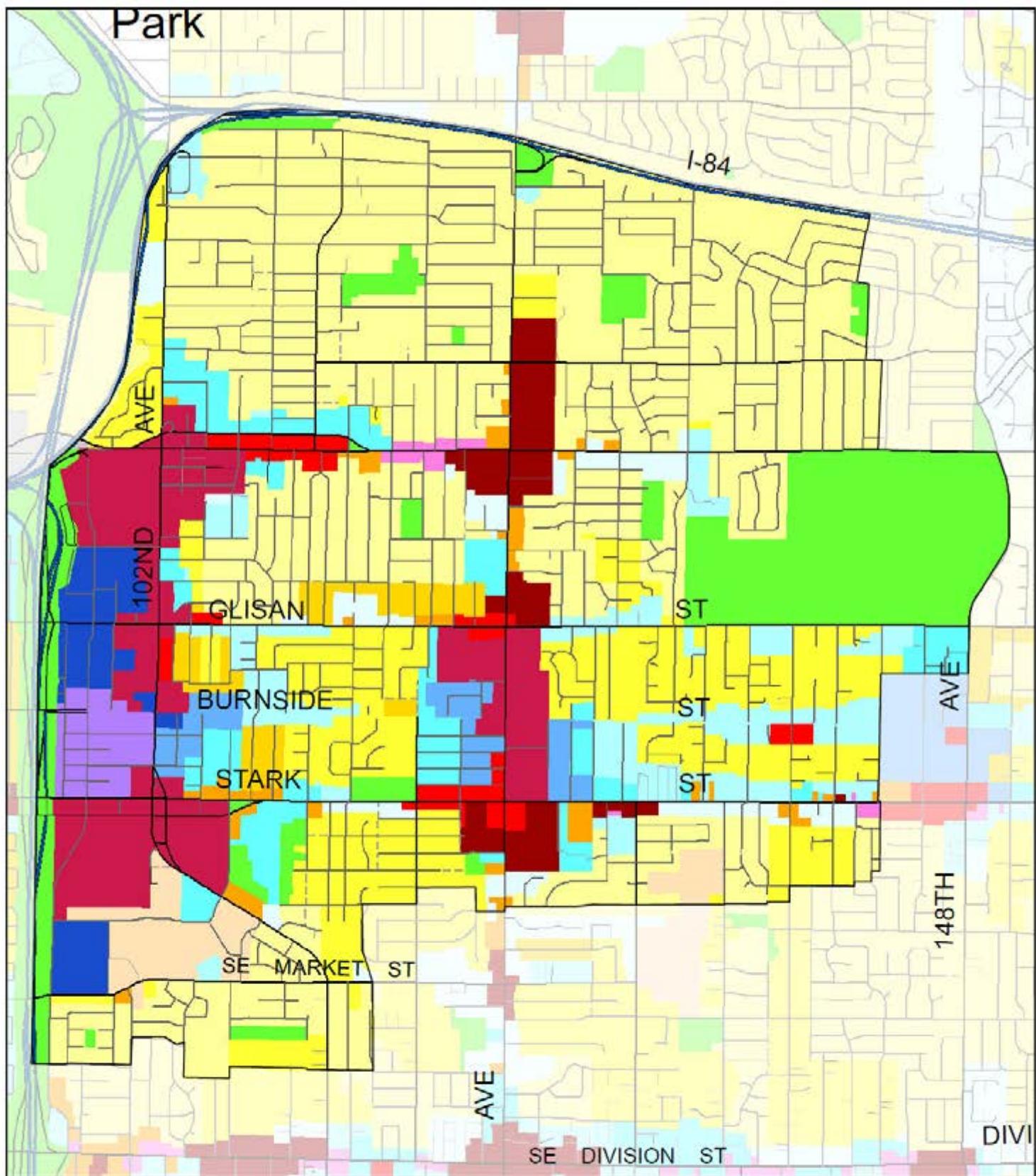
2010 Housing Units (Census):	12,723
2035 Housing Units:	29,500

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Gateway Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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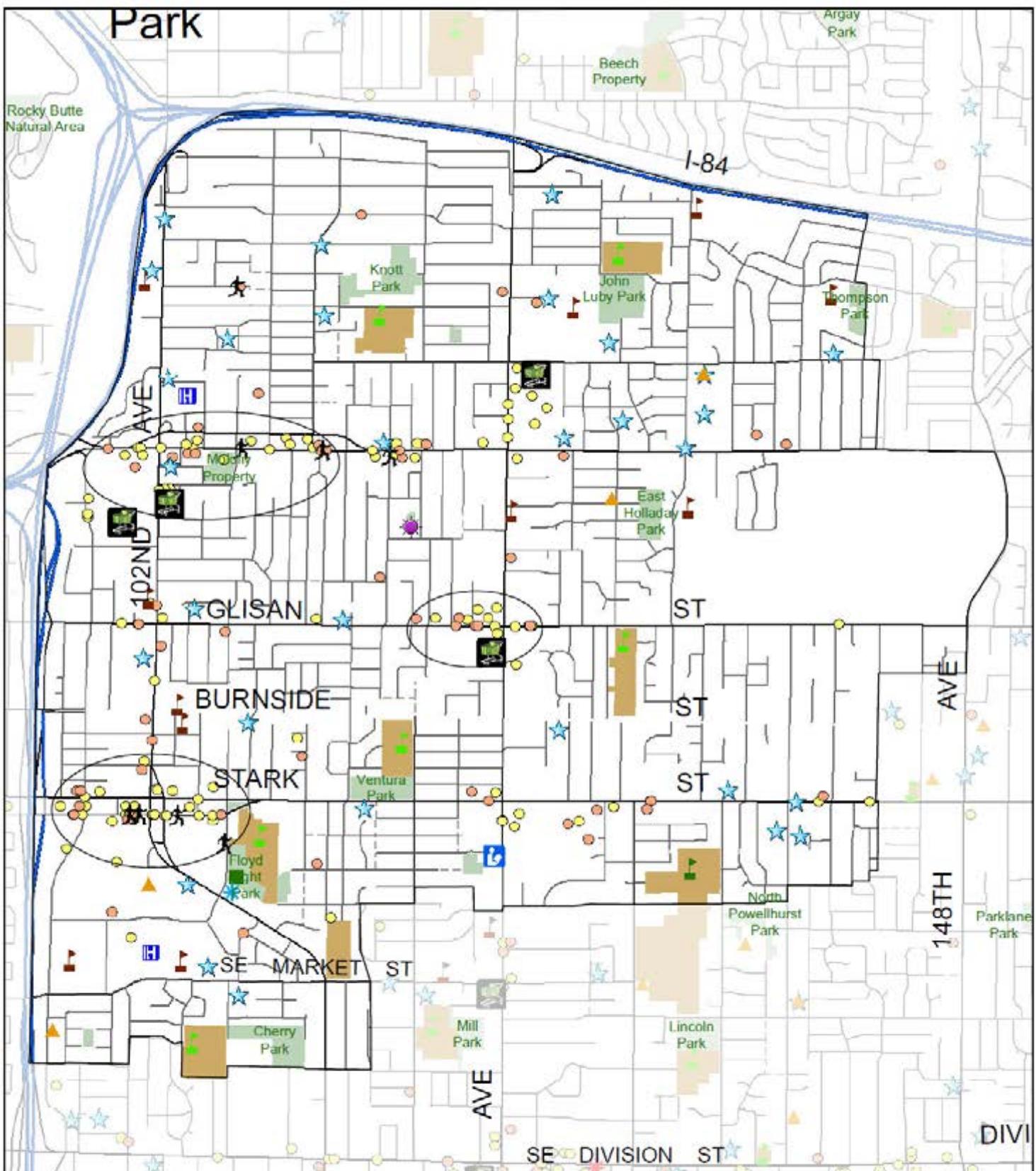


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City of Portland, Oregon  
Sam Adams, Mayor • Jason Anderson, Director

# Gateway Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

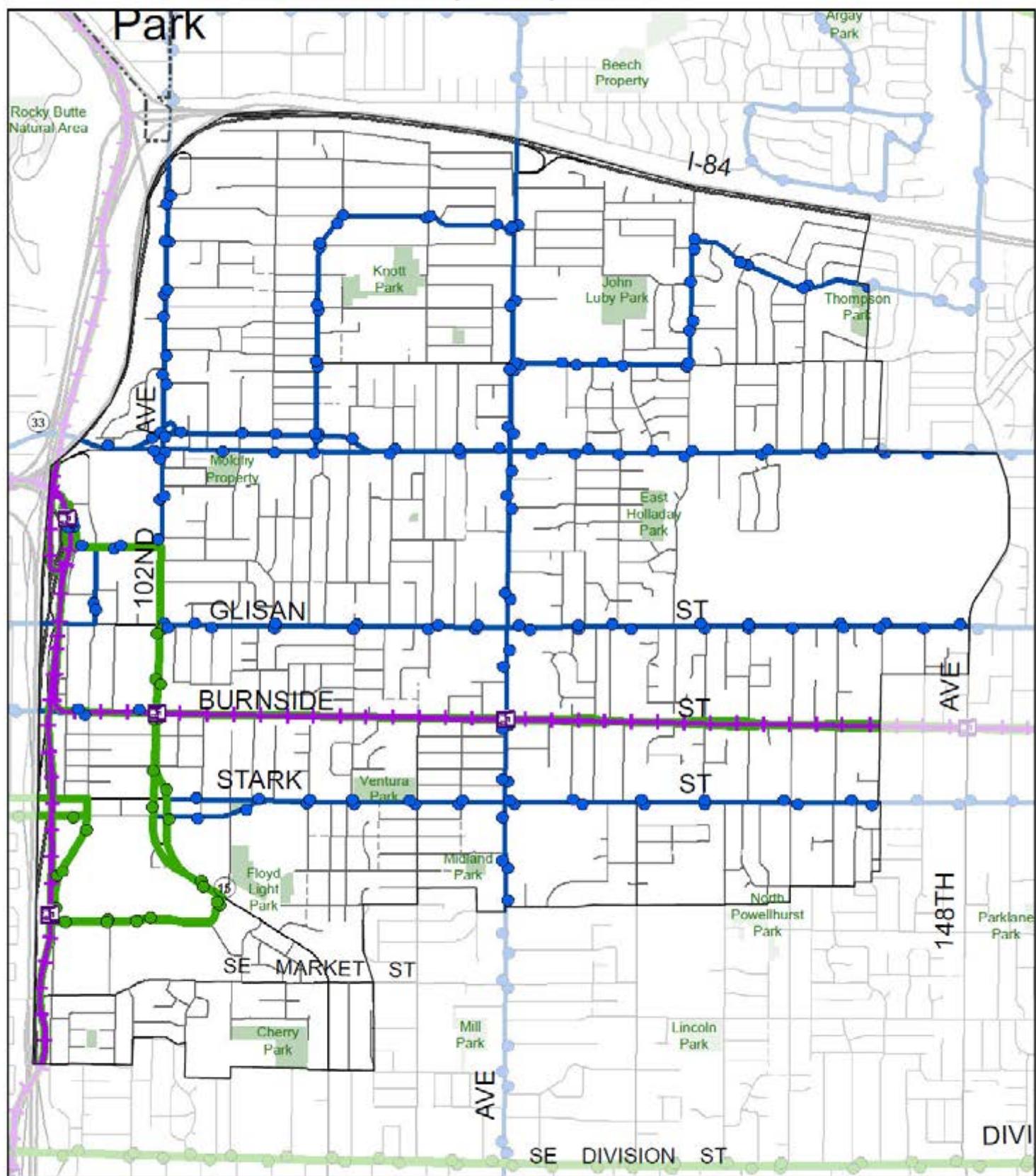
City of Portland Bureau of Planning and Sustainability



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City of Portland Oregon  
Sam Adams Mayor • Jessie Johnson Director

# Gateway Analysis Area



## Transit Infrastructure

February 1, 2012

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- |       | Light Rail Stops | Bus Stops              |
|-------|------------------|------------------------|
| ■     | MAX              | Frequent Stops         |
| ●     | Street Car       | Standard Stops         |
| ■     | MAX              | Rush Hour Stops        |
| ■     | Streetcar        | Standard Service       |
| ■     |                  | Rush Hour Only Service |
| — — — |                  | City Boundary          |



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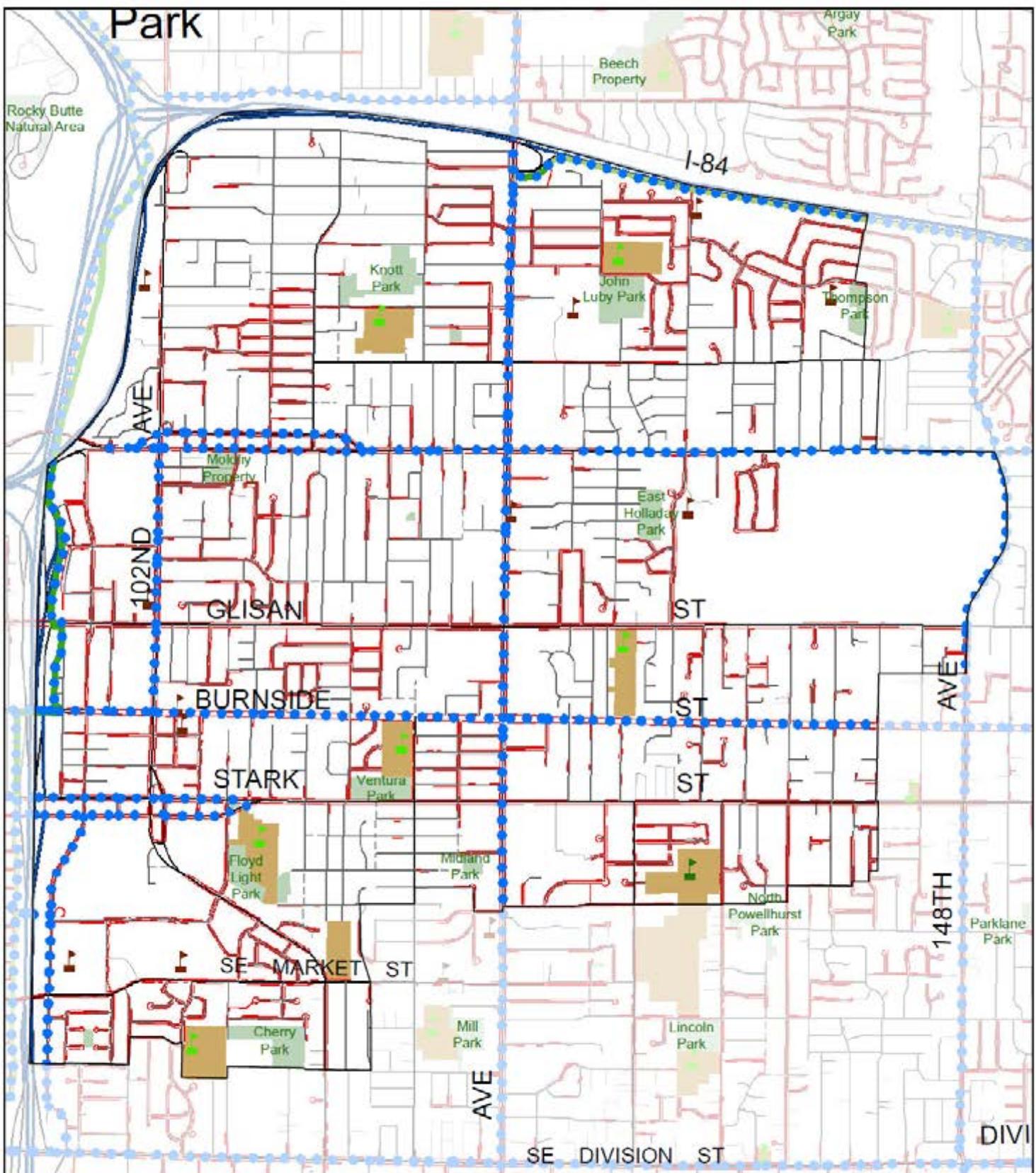


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City of Portland, Oregon  
John Adams, Mayor • Susie Anderson, Director

# Gateway Analysis Area



## Sidewalks and Bicycle Infrastructure

February 1, 2012

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools

0 1,000 2,000 3,000 Feet



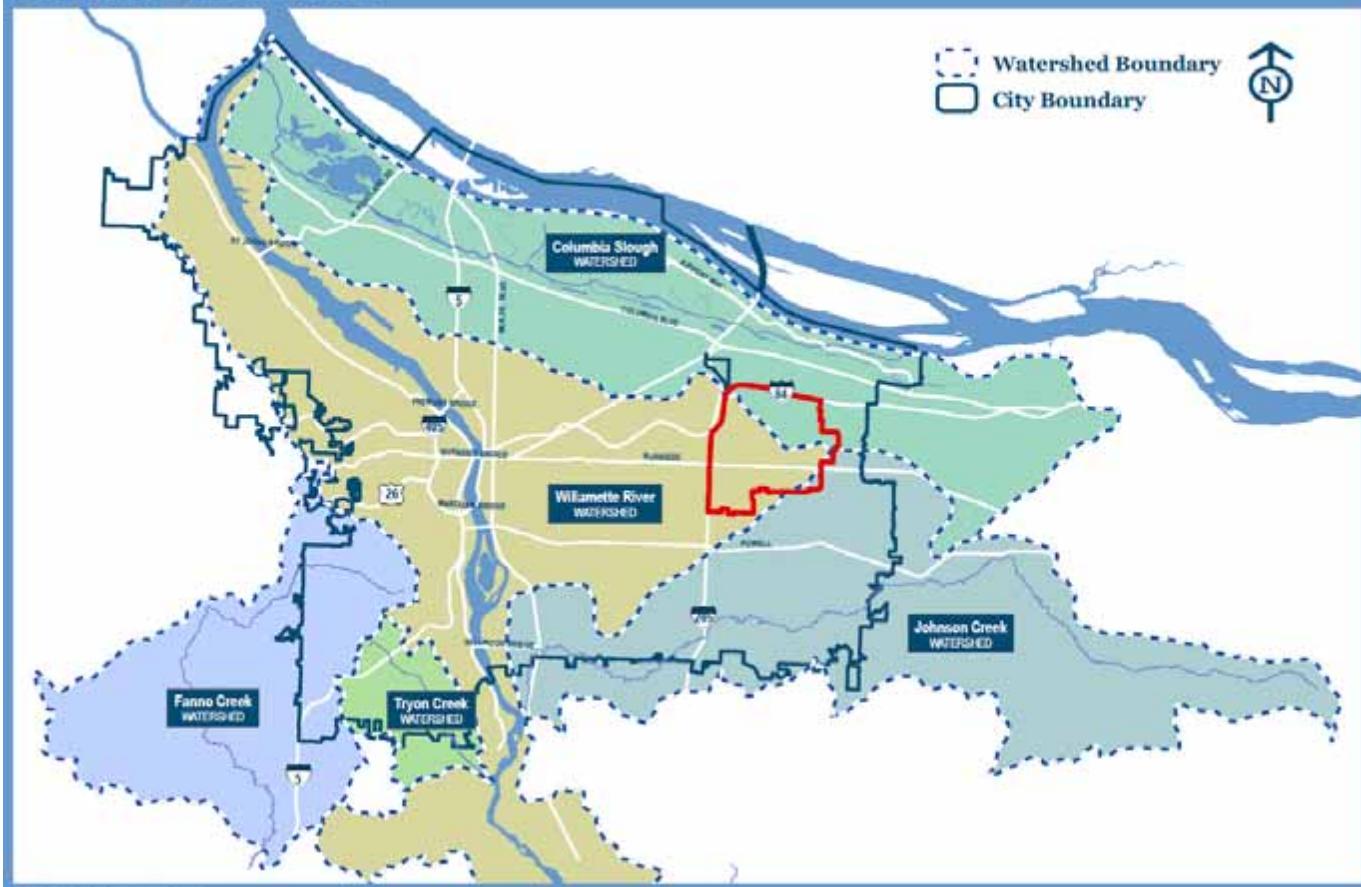
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City of Portland, Oregon  
Sam Adams, Mayor • Jason Anderson, Director

## Portland Watersheds

2012



## Portland Stormwater System

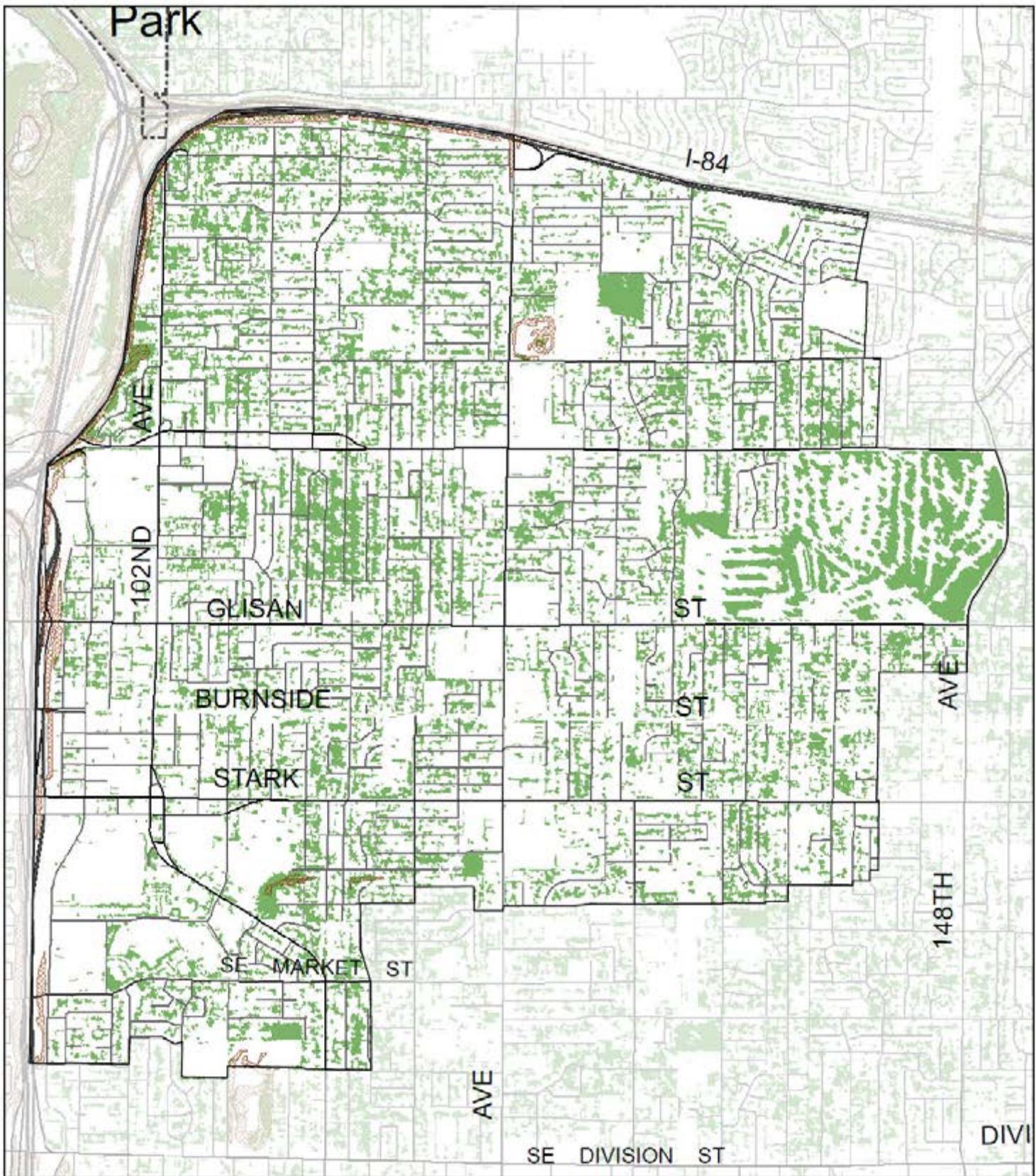
City Boundary  
Managed Flood Plain  
Stormwater Collection Systems

- Combined Sewer Area
- Natural System / Stream Drainage
- Mix of Underground Injection (UIC) & Combined Sewer Area
- Mix of Underground Injection (UIC) & Natural System Area



Note:  
The types of stormwater collection areas have been simplified for the purpose of this generalized map.  
For detailed information, please contact the Bureau of Environmental Services.

# Gateway Analysis Area



## Watersheds and Natural Features

February 1, 2012

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



NORTH

0 1,000 2,000 3,000 Feet



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Hon. Adrienne Mayor - Mayor; Stacey Anderson, Director

# Gateway Analysis Area

## Demographics (2000 – 2010)

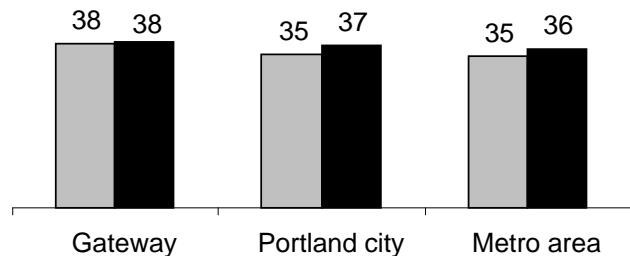
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

	Gateway	Portland city	Metro area
2010	30,143	583,776	2,226,009
2000	26,853	529,121	1,927,881
% change	12%	10%	15%

■ 2000 ■ 2010

### Median Age

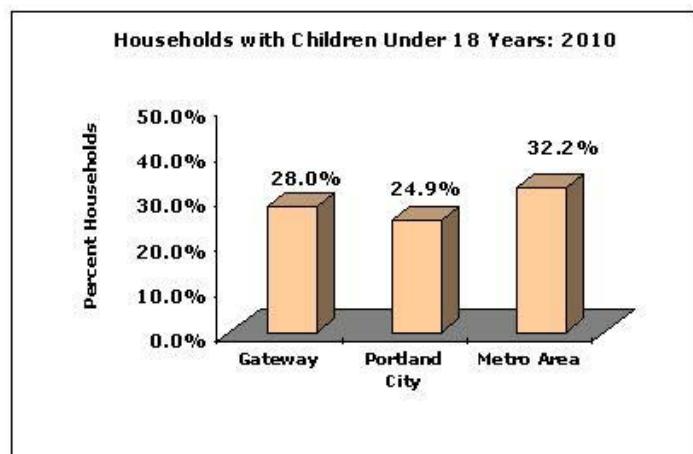
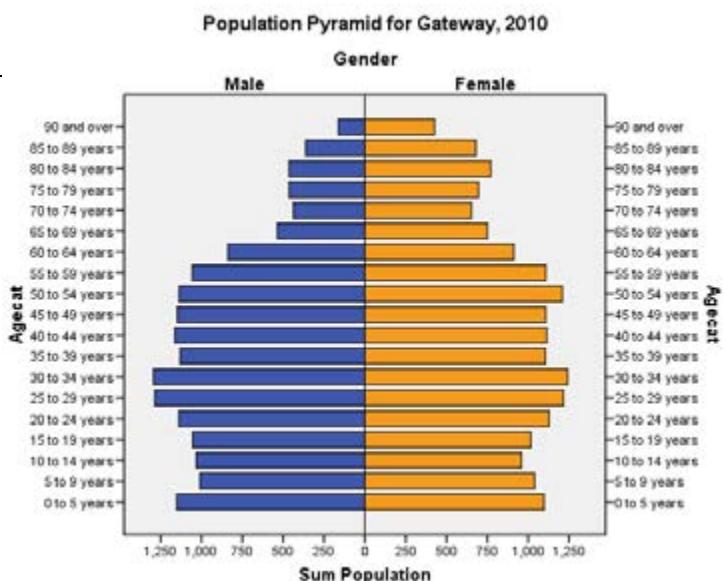
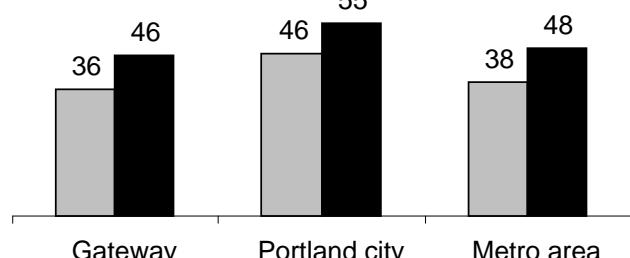


### Average Household Size

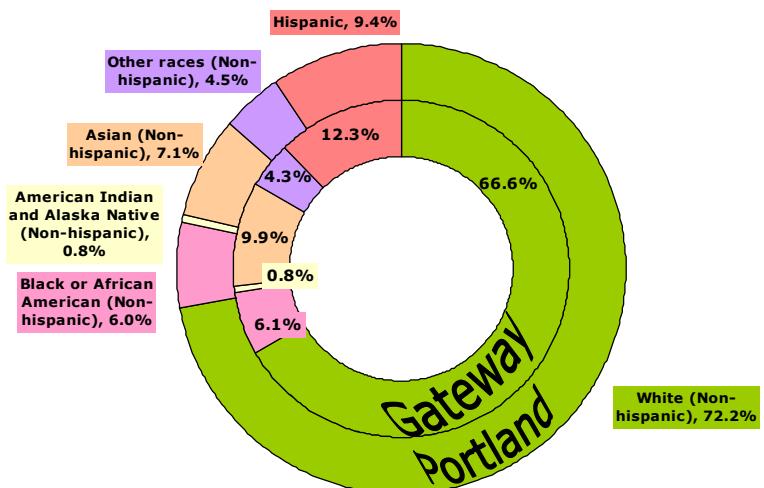


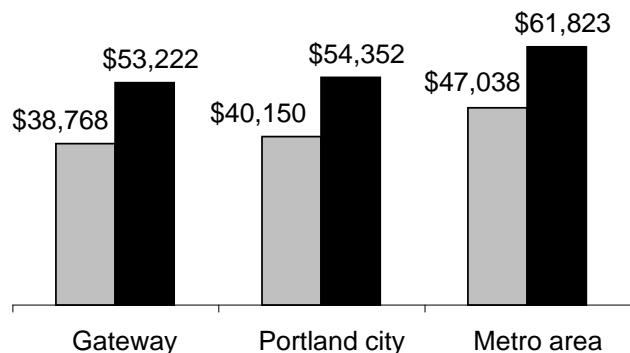
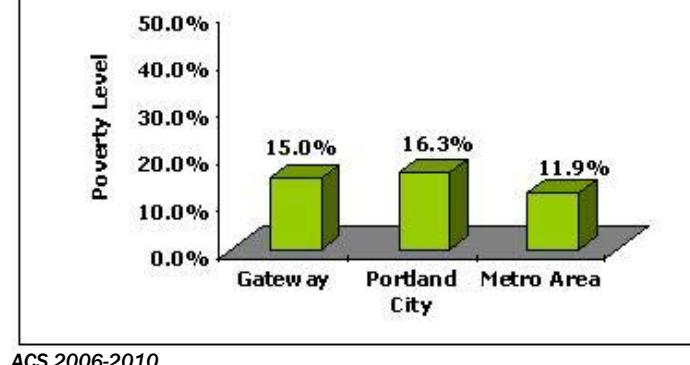
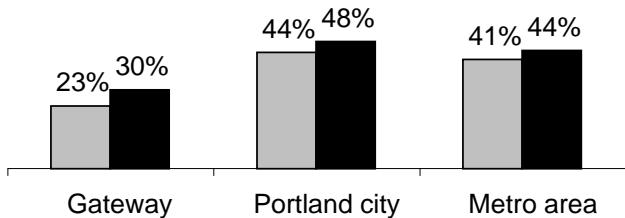
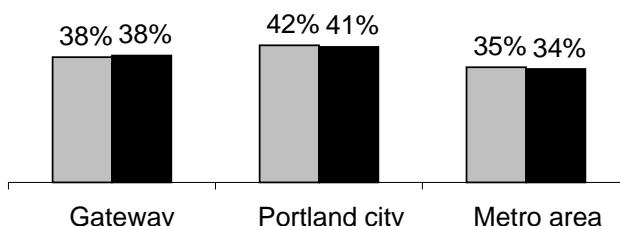
### Diversity Index

(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



### Racial and Ethnic Distribution in Portland vs. Gateway



**Median Household Income****Percent Below Poverty: 2010****Percent College Graduates****Percent Renters of Occupied Housing Units****Median Home Value**

	Gateway	Portland city	Metro area
2010	\$228,955	\$253,184	\$273,500
2000	\$143,033	\$154,721	\$168,347
% change	60.1%	63.6%	62.5%

# Gateway Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

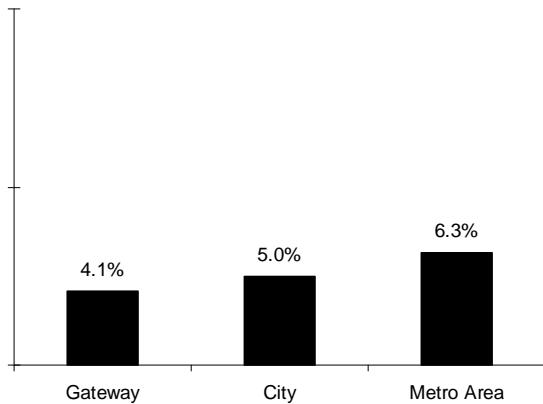
Gateway	City	Metro Area
3,265,804	51,937,895	107,875,146

### OFFICE SPACE

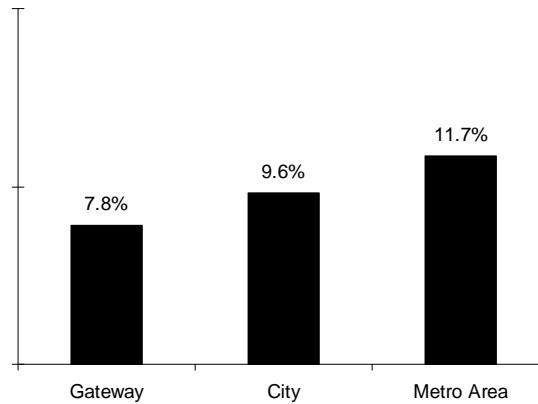
#### Square Feet

Gateway	City	Metro Area
1,104,817	54,348,765	92,465,455

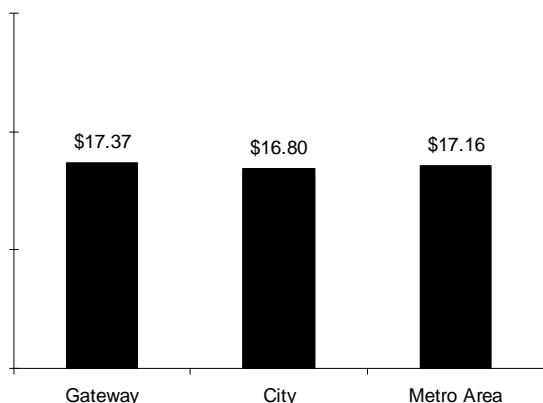
#### Retail Vacancy



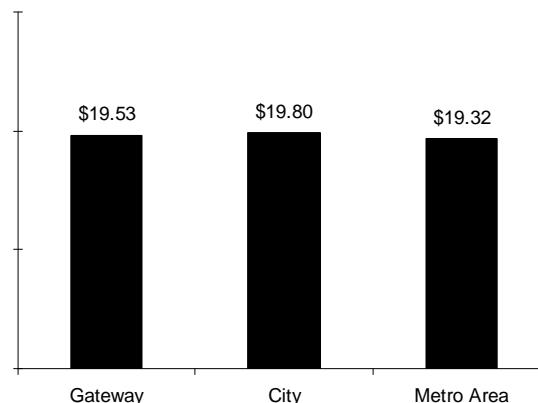
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Gateway Analysis Area

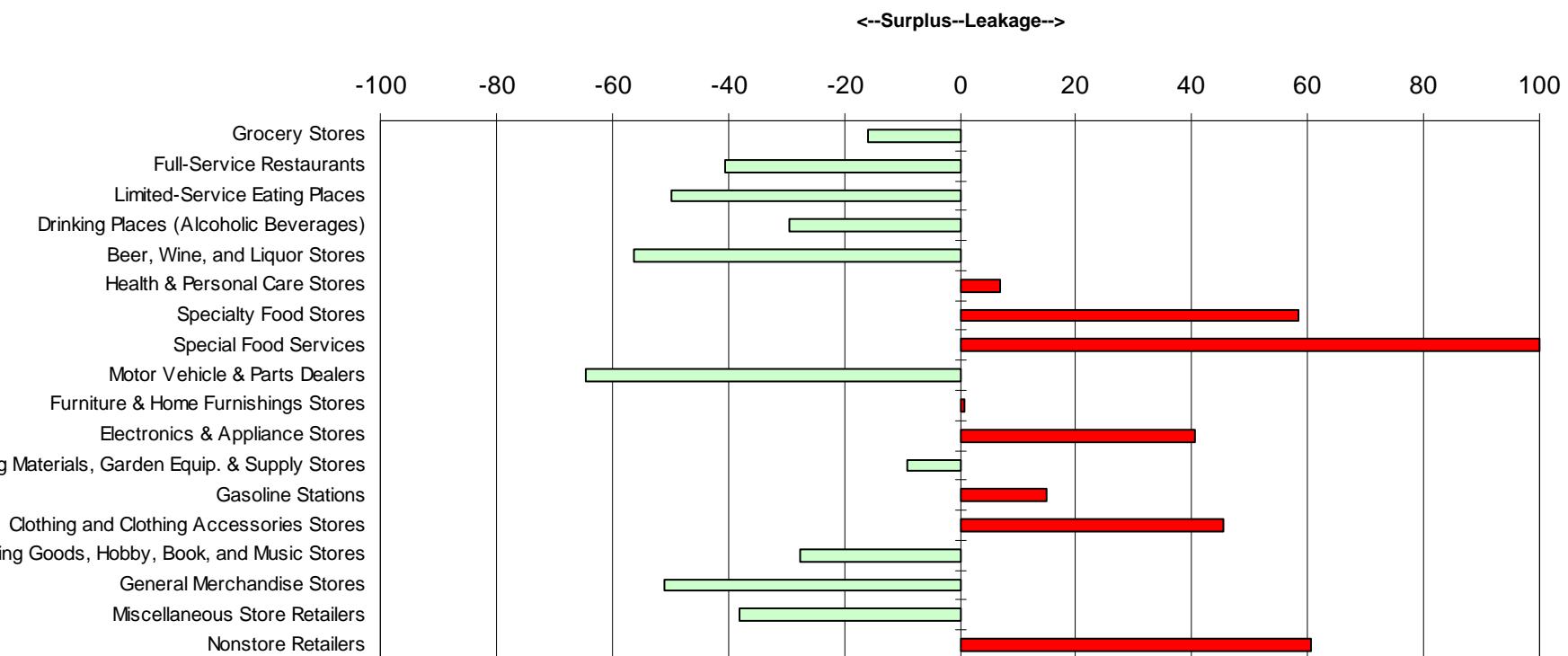
## Retail Market Profile

**Retail Gap = \$301 million (surplus)**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$247,808,967	\$548,926,761	-\$301,117,794	-37.8	262
Total Retail Trade (NAICS 44-45)	\$211,294,059	\$464,990,766	-\$253,696,707	-37.5	175
Total Food & Drink (NAICS 722)	\$36,514,908	\$83,935,995	-\$47,421,087	-39.4	87

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Gateway Analysis Area

## Employment

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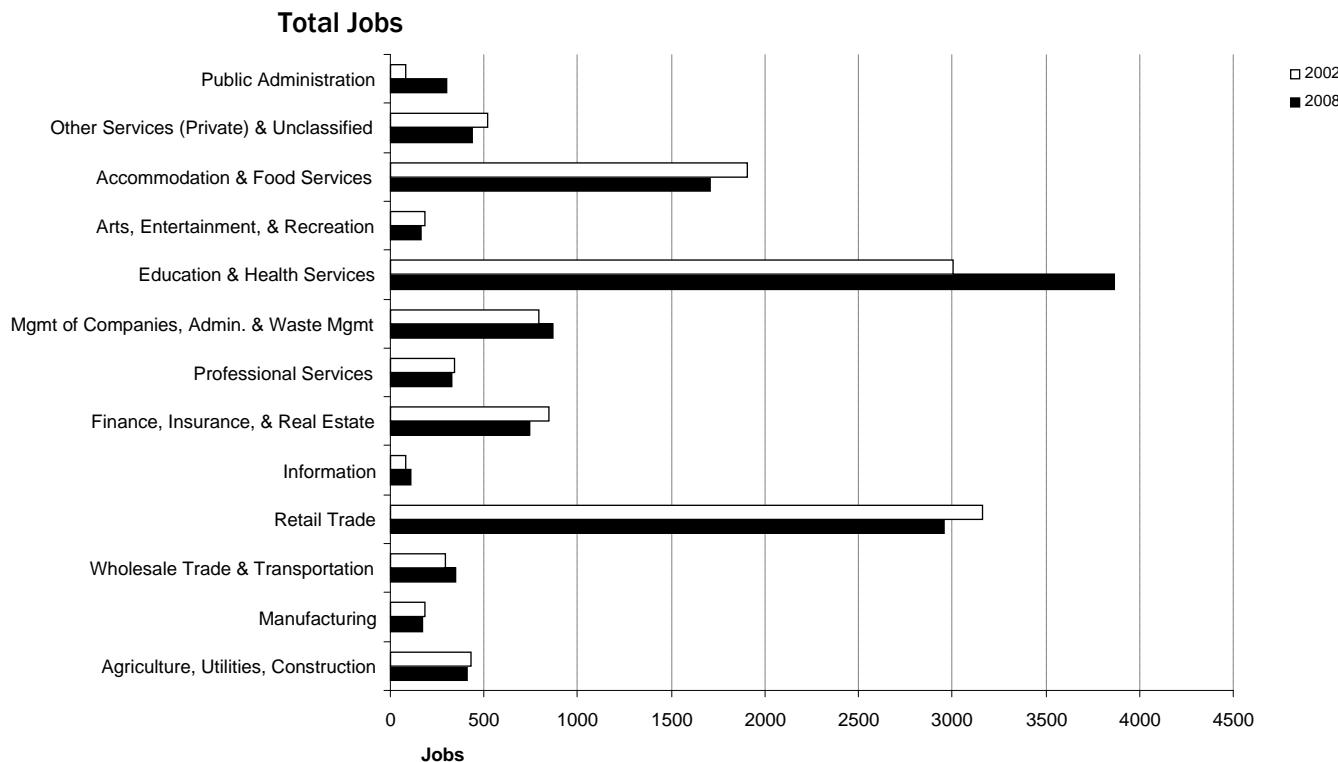
Quarterly Census of Employment and Wages data for 2002 & 2008

Source: Oregon Employment Department (OED)

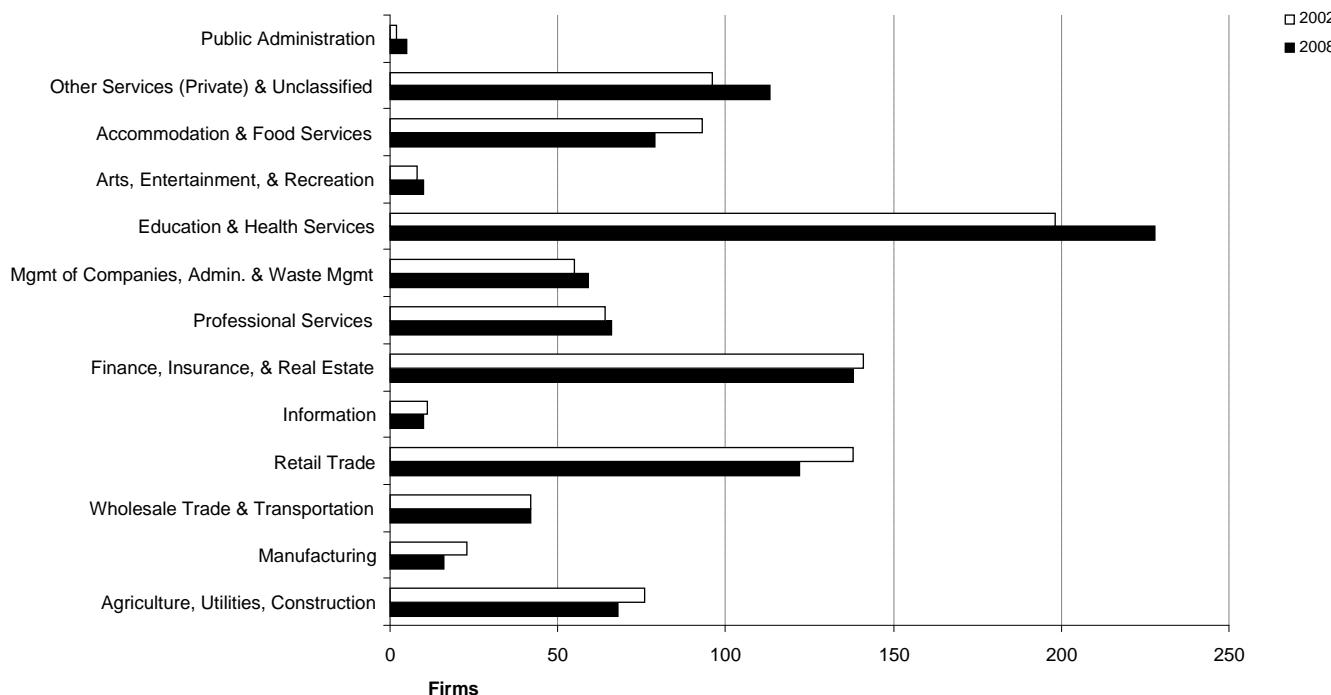
*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

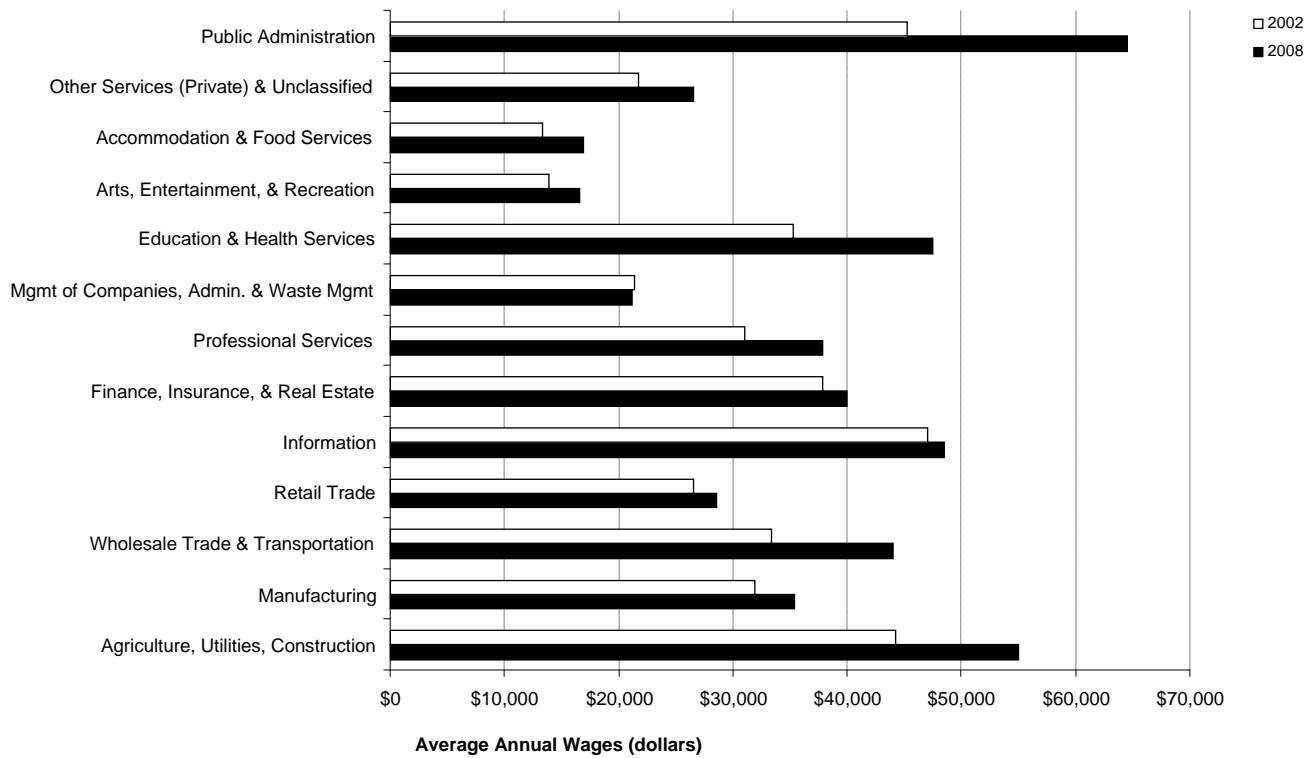
	2002	2008	change
Total Jobs	11,823	12,421	+598
Total Firms	947	956	+9
Average Annual Wages	\$27,960	\$35,607	+7,647



### Total Firms



### Average Annual Wages

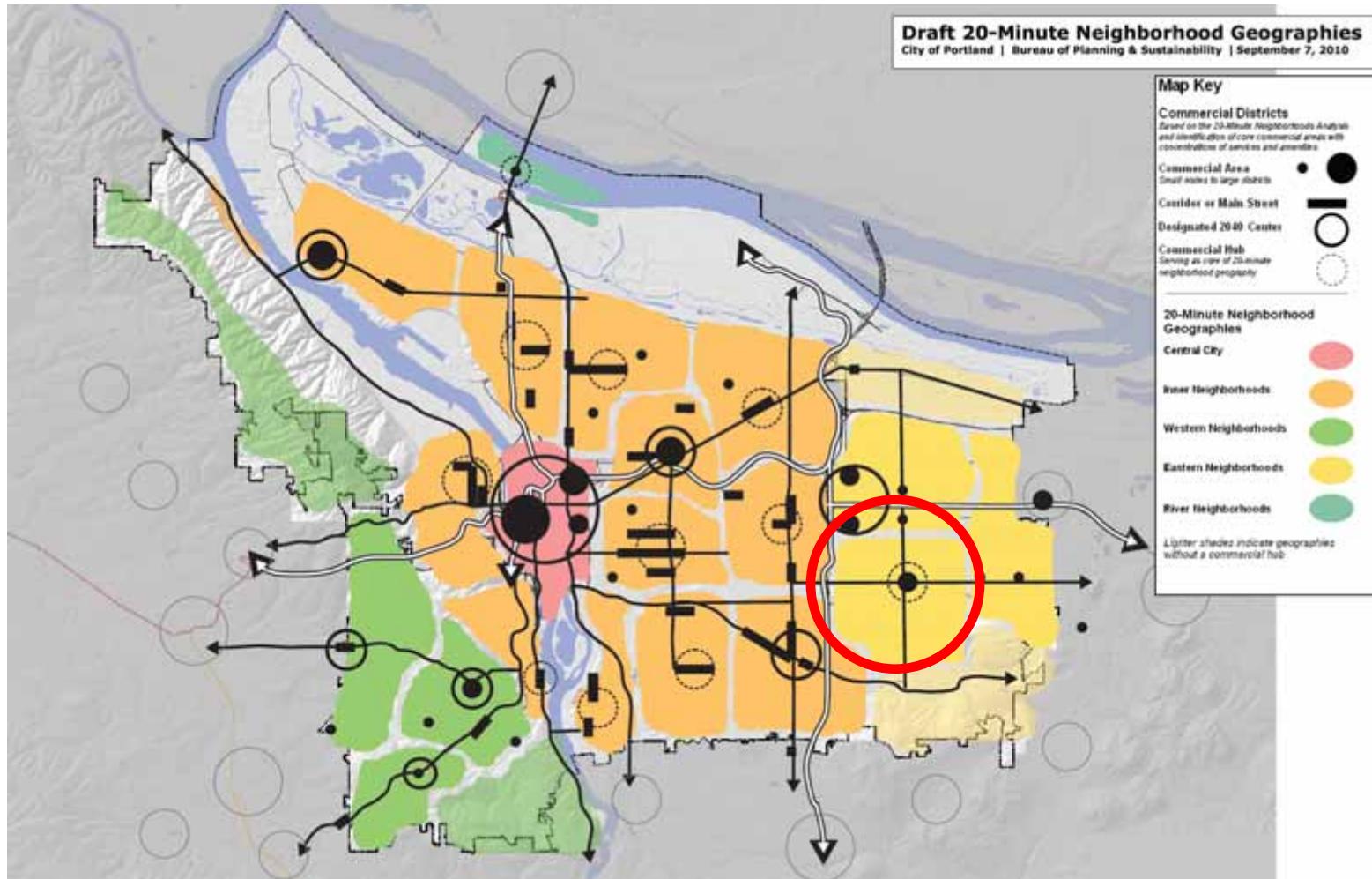




## 122<sup>nd</sup>-Division Analysis Area

Including Powellhurst-Gilbert, Mill Park, and parts of the Hazelwood and Lents neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# 122<sup>nd</sup>-Division Analysis Area

## Services and Amenities

Population: 38,700 people (13,000 households)  
 Land Area: 5.1 sq. miles (7,600 people per sq. mile)

### Commercial Districts

The area's largest concentration of commercial services is located at SE Division and 122<sup>nd</sup> Avenue. A smaller cluster of commercial services is located at SE Powell and 122<sup>nd</sup> Avenue.

**Grocery stores:** 3 (1 store per 4,333 households)

**Retail gap:** \$126 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	99%
Within 1/2 mile of a public elementary school:	33%
Within 3 miles of a full-service community center*:	91%
Within 1/2 mile of a full-service grocery store:	18%
Within 1/4 mile of a frequent service transit stop:	17%

\*Parks Bureau service standard

**Community Centers:** None (East Portland Community Center located just outside northern edge of analysis area)

**Libraries:** None (Midland Library located just outside northern edge of analysis area)

**Parks and Open Spaces:** 131 acres – including Cherry, Mill, Lincoln, West Powellhurst, Ed Benedict, Earl Boyles, Gilbert Heights, and Raymond parks, Kelly Butte Natural Area, and Beggars-tick Wildlife Refuge.

**Tree Canopy Coverage:** 26%

**Public Schools:** 1 high school (David Douglas – at northern edge of analysis area)

7 K-8 schools (Cherry Park, Mill Park, Lincoln Park, West Powellhurst, Earl Boyles, and Gilbert Heights elementary schools; Ron Russell Middle Schools)

**Colleges** (campus): None

**Hospitals:** 1 (Adventist Medical Center – at northwest edge of analysis area)

**Farmers Markets:** None

**Transit Centers/Stations:** 3 (SE Division, SE Powell and SE Holgate light rail stations – all located at western edge of analysis area)

**Walkable Access Score:** 47 (out of 100)  
*(from 20-Minute Neighborhoods Analysis Index)*

### Neighborhood and Business Associations

**Neighborhood Associations:** Powellhurst-Gilbert, Mill Park, and parts of Hazelwood and Lents

**Business Associations:** Gateway Area and Midway business associations

## Urban Form Characteristics

The area includes a diverse mix of block types, which are often large with deep lots, and most streets lack continuous sidewalks. The area's larger commercial areas, located at the intersections of major arterial streets, are primarily auto-oriented shopping centers fronted by surface parking lots. The area's most prominent natural feature is Kelly Butte, which, together with Powell Butte to the east and Douglas Fir groves located in mid-block areas, dominate the area's skyline. The Springwater Corridor borders the area to the south, an area which also includes low-lying floodplain.

**Access issues.** The area lacks good street connectivity and most secondary streets lack sidewalks, as do some major streets (Powell, portions of 122<sup>nd</sup> Avenue and Division). These conditions, combined with infrequent signalized crosswalks on the area's major streets, limit pedestrian access to the area's commercial services. Limited access to frequent service transit. Some of the area's parks are unimproved and there are few pedestrian connections to the Springwater Corridor, limiting pedestrian access to recreational opportunities. The I-205 Freeway serves as a barrier to adjacent areas to the west.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	4.2 miles (Division, 122 <sup>nd</sup> Avenue)
Station Communities:	3

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,628	60%	491
Multi-Family Residential:	736	27%	254
Commercial/Mixed-Use:	145	5%	72
Employment:	23	.9%	17
Industrial:	42	2%	1
Open Space:	124	5%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

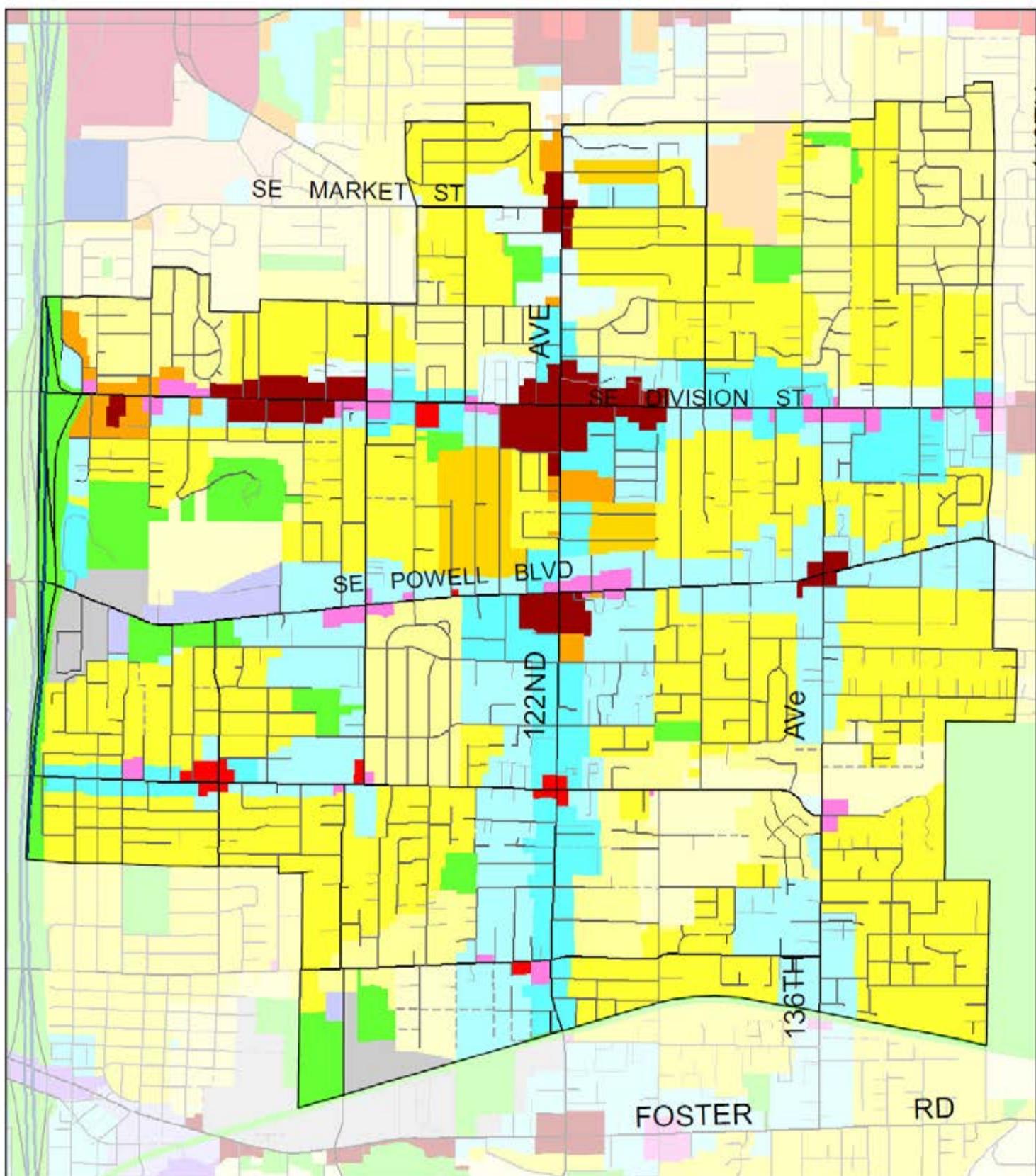
2010 Housing Units (Census):	13,780
2035 Housing Units:	20,400

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

## 122nd-Division Analysis Area



### Comprehensive Plan Designations

February 1, 2012

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#### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet

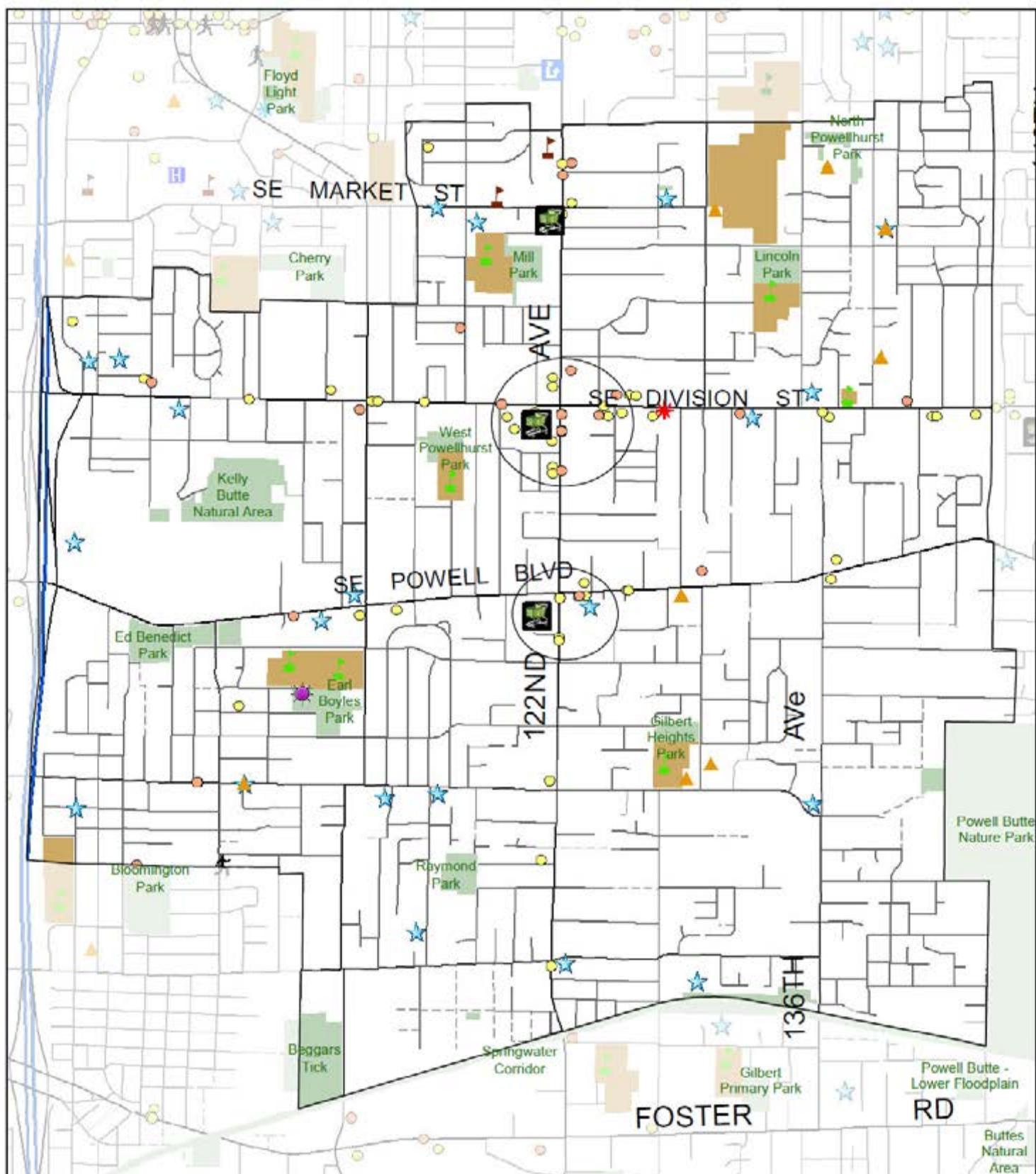


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City of Portland, Oregon  
Bob Ormond, Mayor • Sam Adams, Director

# 122nd-Division Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Farmers Markets
- Grocery Stores
- Places of Worship
- Preschools
- Daycare Centers
- Public HS
- Public K-8
- Private Schools
- County Health Clinic
- County Aging Services



0 1,000 2,000 3,000 Feet

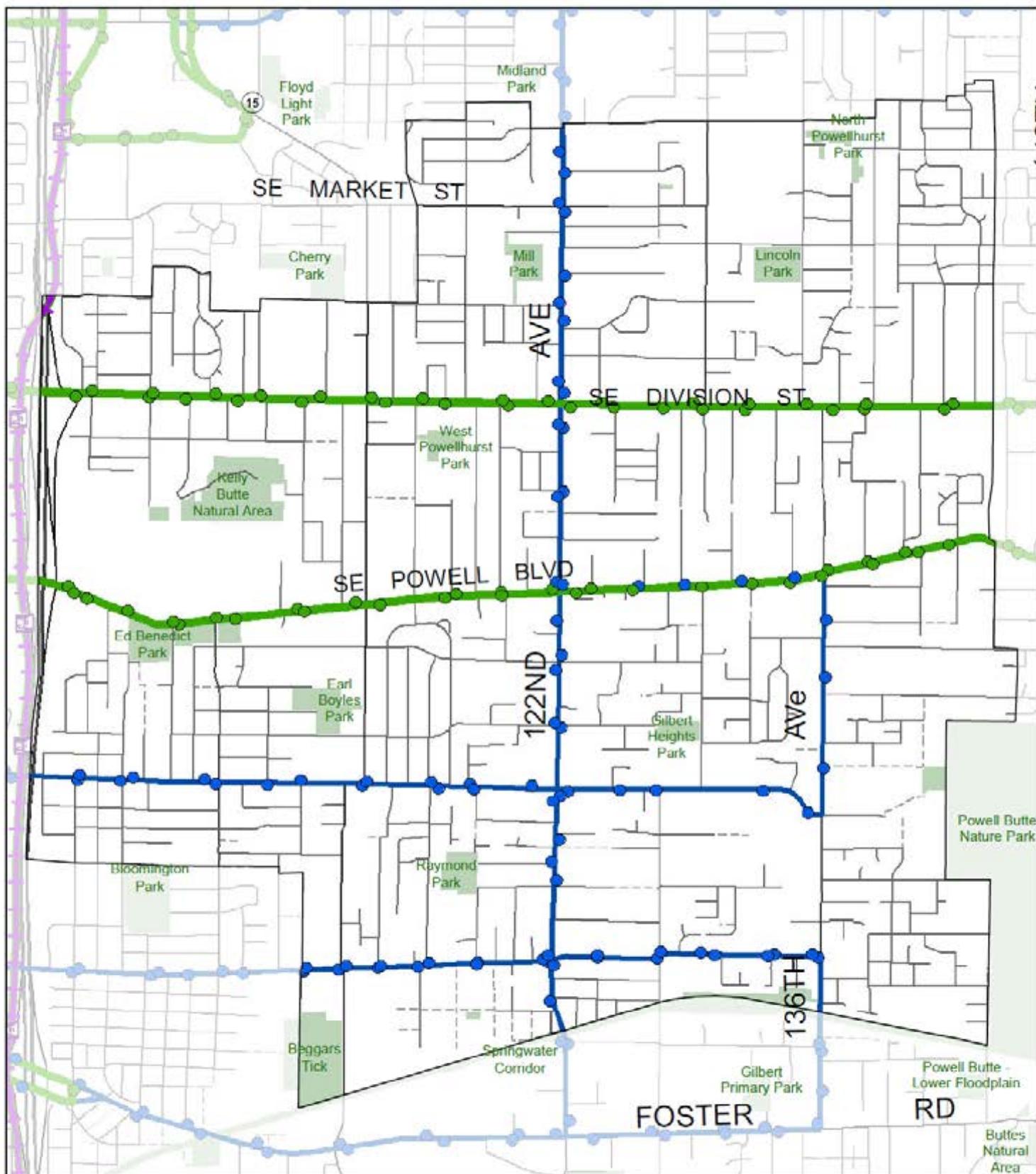


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City of Portland, Oregon  
Nan Adams Meyer, Director  
Janet Anderson, Director

# 122nd-Division Analysis Area



## Transit Infrastructure

February 1, 2012

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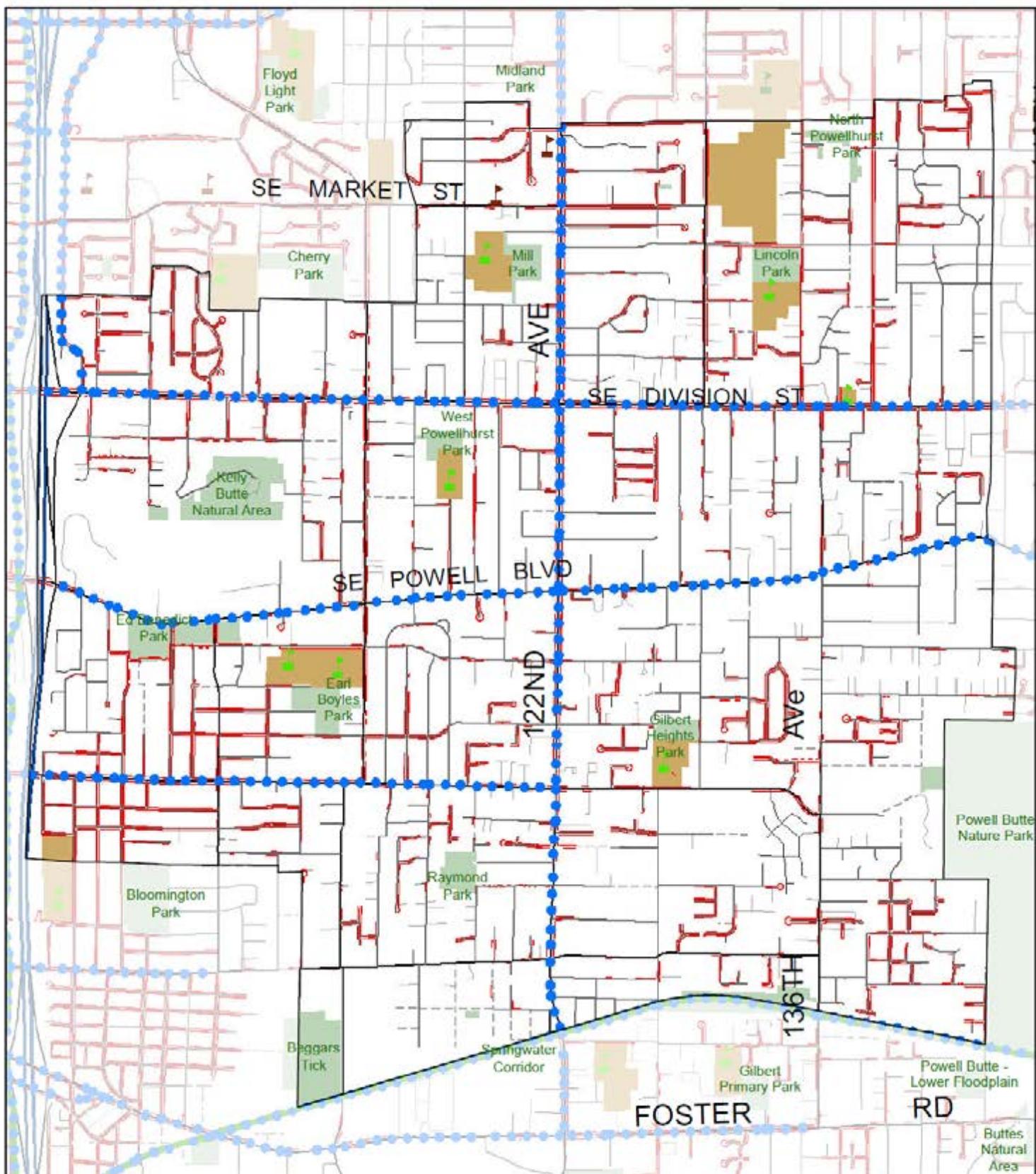
Light Rail Stops	Bus Stops
MAX	Frequent Stops
Street Car	Standard Stops
MAX	Rush Hour Stops
Streetcar	
	<b>Frequent Service</b>
	<b>Standard Service</b>
	<b>Rush-Hour Only Service</b>
	<b>City Boundary</b>



0 1,000 2,000 3,000  
Feet



# 122nd-Division Analysis Area



## Sidewalks and Bicycle Infrastructure

February 1, 2012

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland



0 1,000 2,000 3,000  
Feet

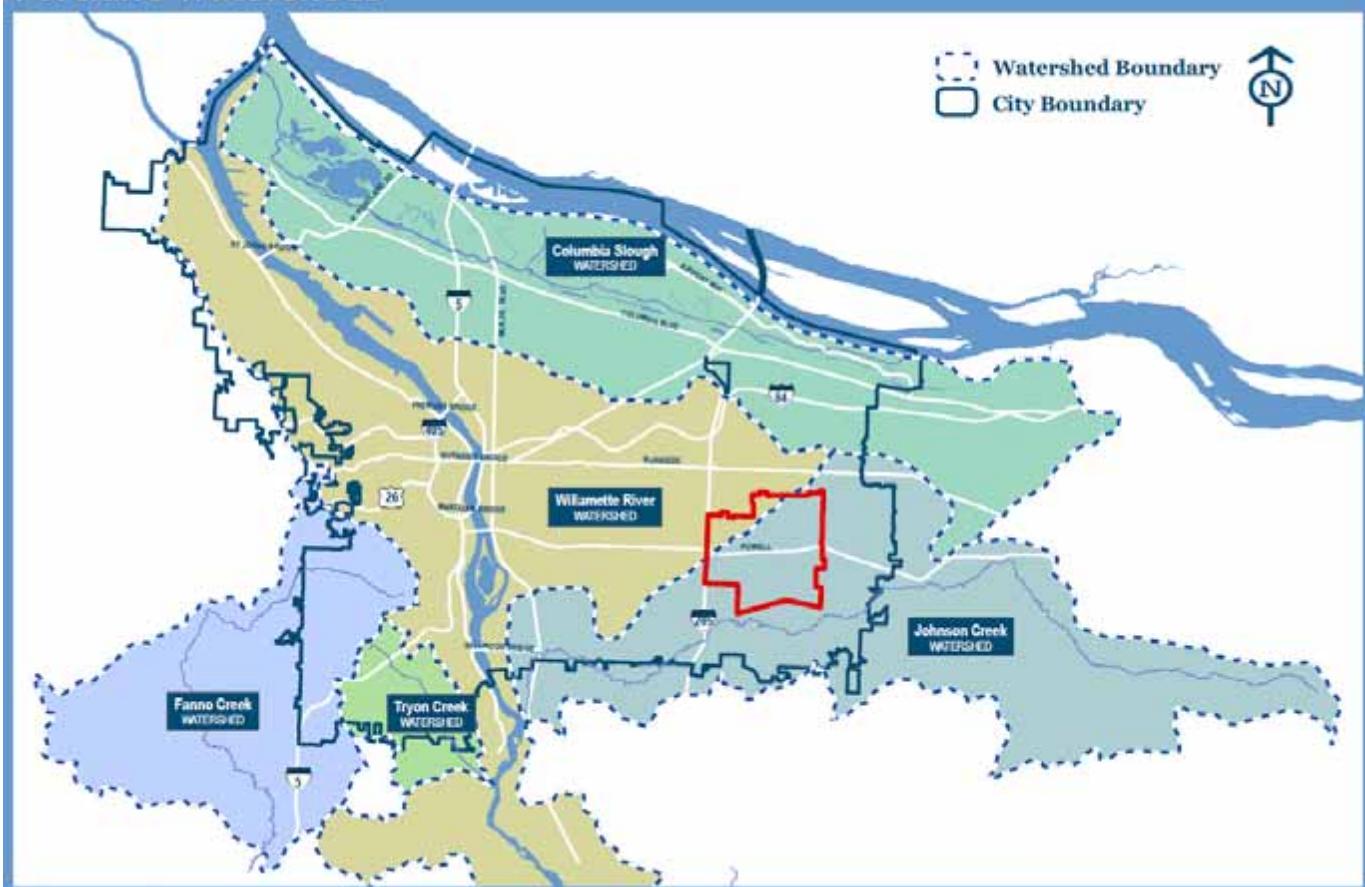


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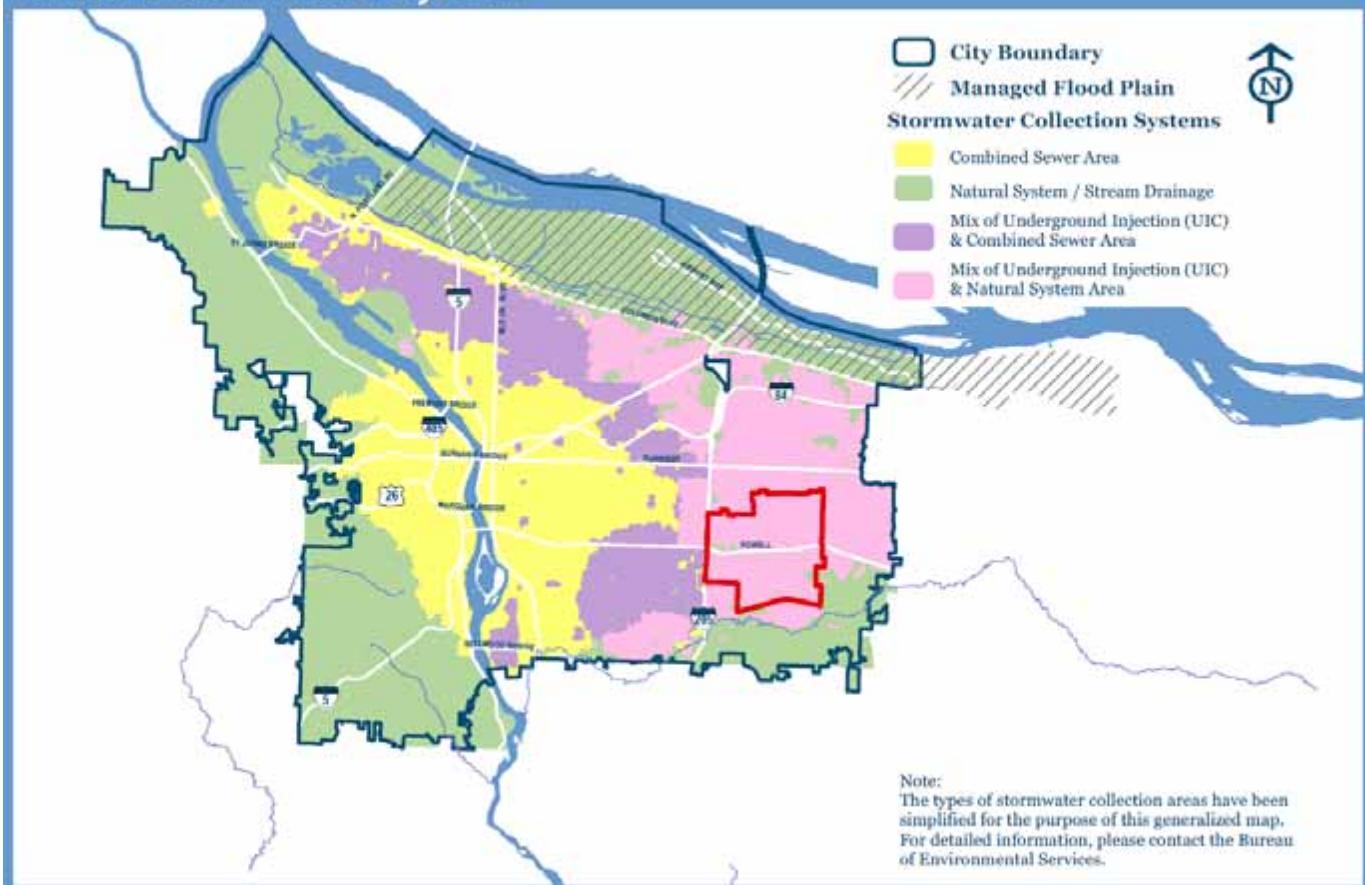


City of Portland, Oregon  
Hon. Abbie Major - Steven Anderson, Director

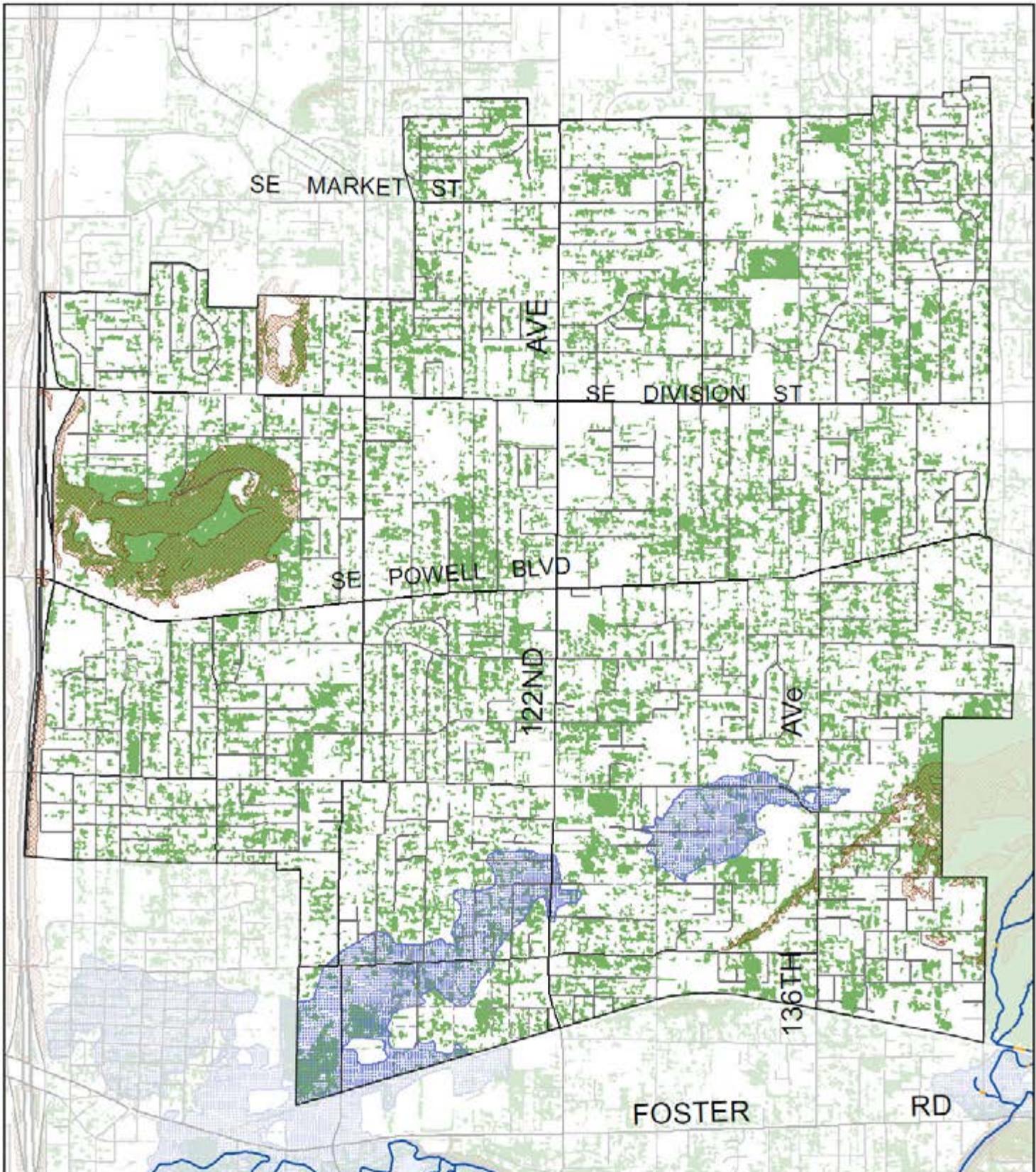
## Portland Watersheds



## Portland Stormwater System



# 122nd-Division Analysis Area



## Watersheds and Natural Features

- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies

- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



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City of Portland Oregon  
Tom Potter - Mayor • Stavros Antoniou, Director

February 1, 2012

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City of Portland Bureau of Planning and Sustainability

15-9

# 122<sup>nd</sup>-Division Analysis Area Demographics (2000 – 2010)

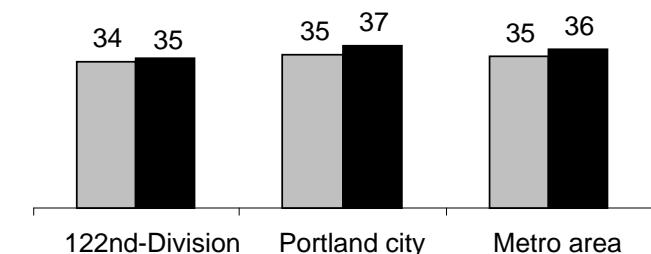
ESRI Business Analyst and US Census 2010 (except as noted)

## Population

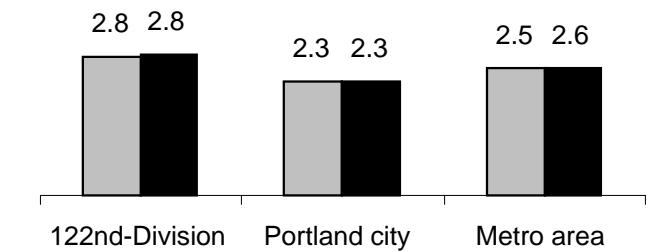
	122nd-Division	Portland city	Metro area
2010	38,653	583,776	2,226,009
2000	31,527	529,121	1,927,881
% change	23%	10%	15%

■ 2000 ■ 2010

## Median Age

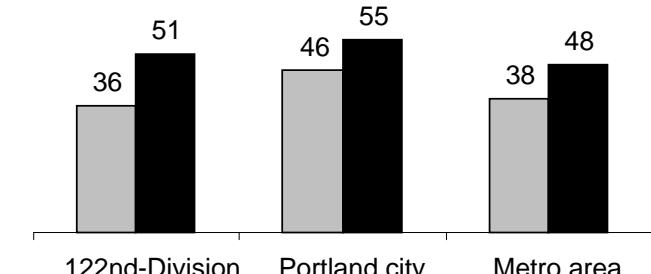


## Average Household Size

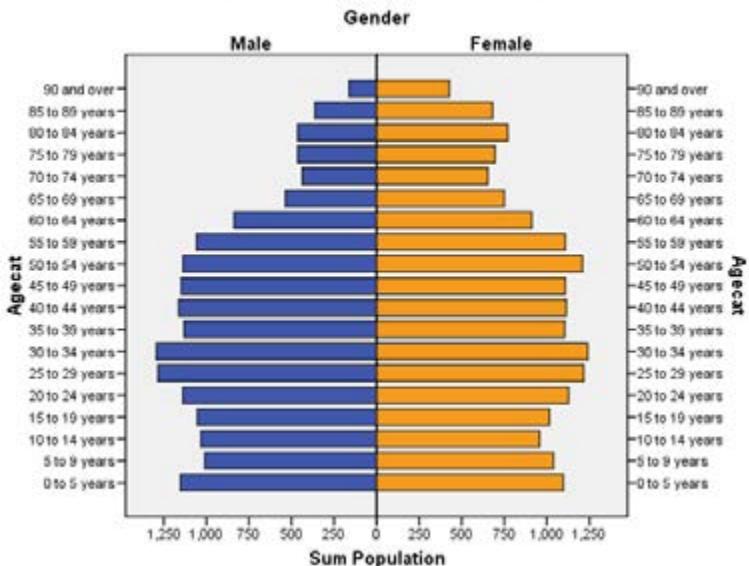


## Diversity Index

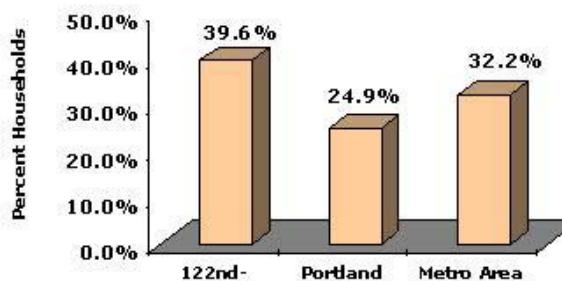
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



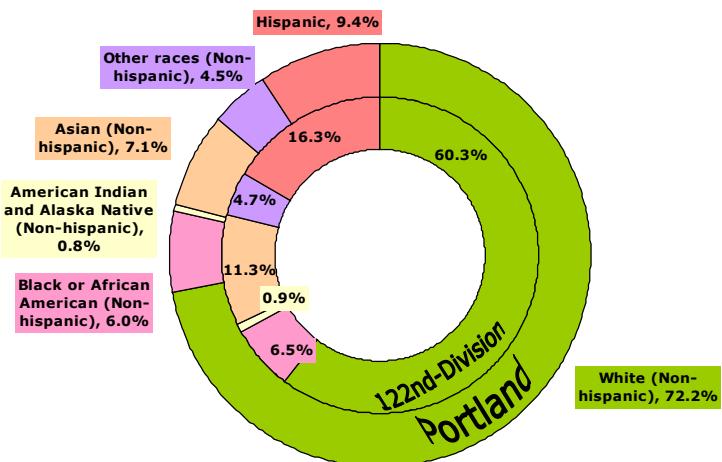
Population Pyramid for 122nd-Division, 2010

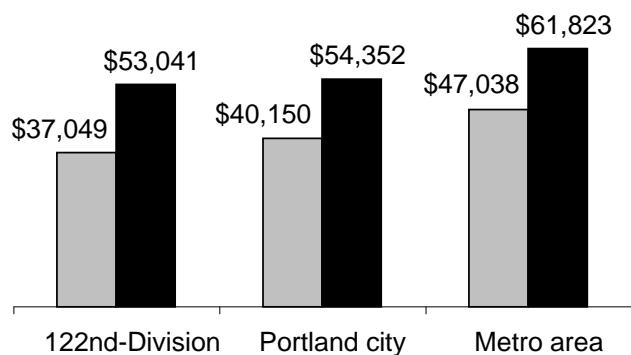
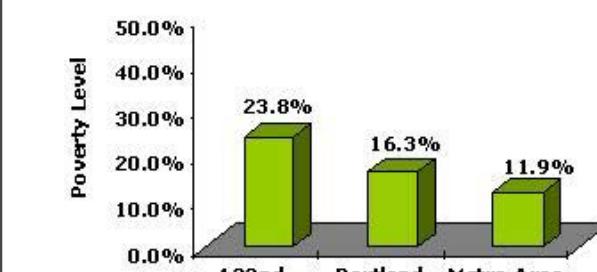


Households with Children Under 18 Years: 2010

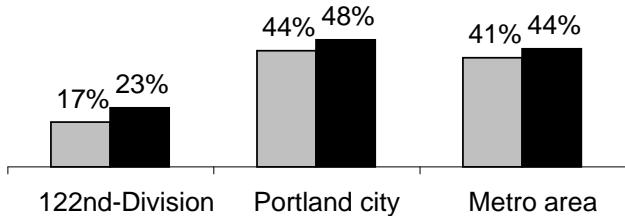
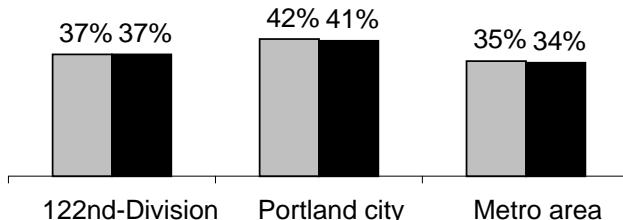


Racial and Ethnic Distribution in Portland vs. 122nd-Division



**Median Household Income****Percent Below Poverty: 2010**

ACS 2006-2010

**Percent College Graduates****Percent Renters of Occupied Housing Units****Median Home Value**

	122nd-Division	Portland city	Metro area
2010	\$208,480	\$253,184	\$273,500
2000	\$133,205	\$154,721	\$168,347
% change	56.5%	63.6%	62.5%

## 122<sup>nd</sup>-Division Analysis Area

### Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

#### RETAIL

##### Square Feet

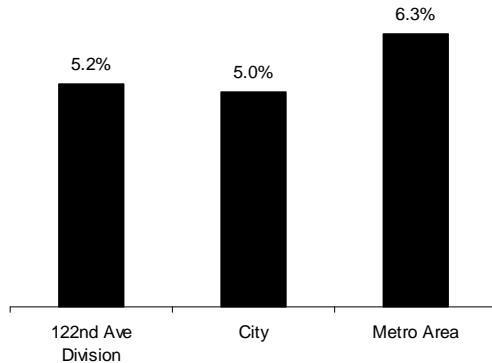
122 <sup>nd</sup> & Div	City	Metro Area
3,265,804	51,937,895	107,875,146

#### OFFICE SPACE

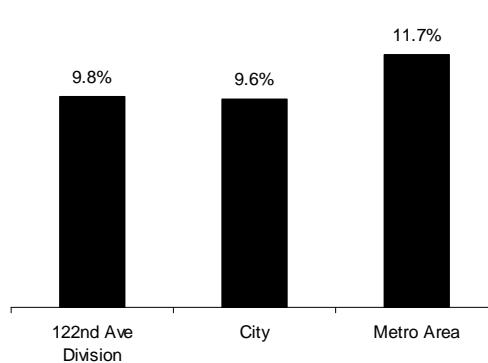
##### Square Feet

122 <sup>nd</sup> & Div	City	Metro Area
1,104,817	54,348,765	92,465,455

#### Retail Vacancy



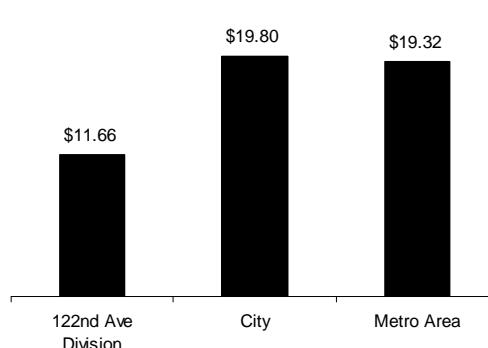
#### Office Vacancy



#### Retail Rents



#### Office Rents



# 122<sup>nd</sup>-Division Analysis Area

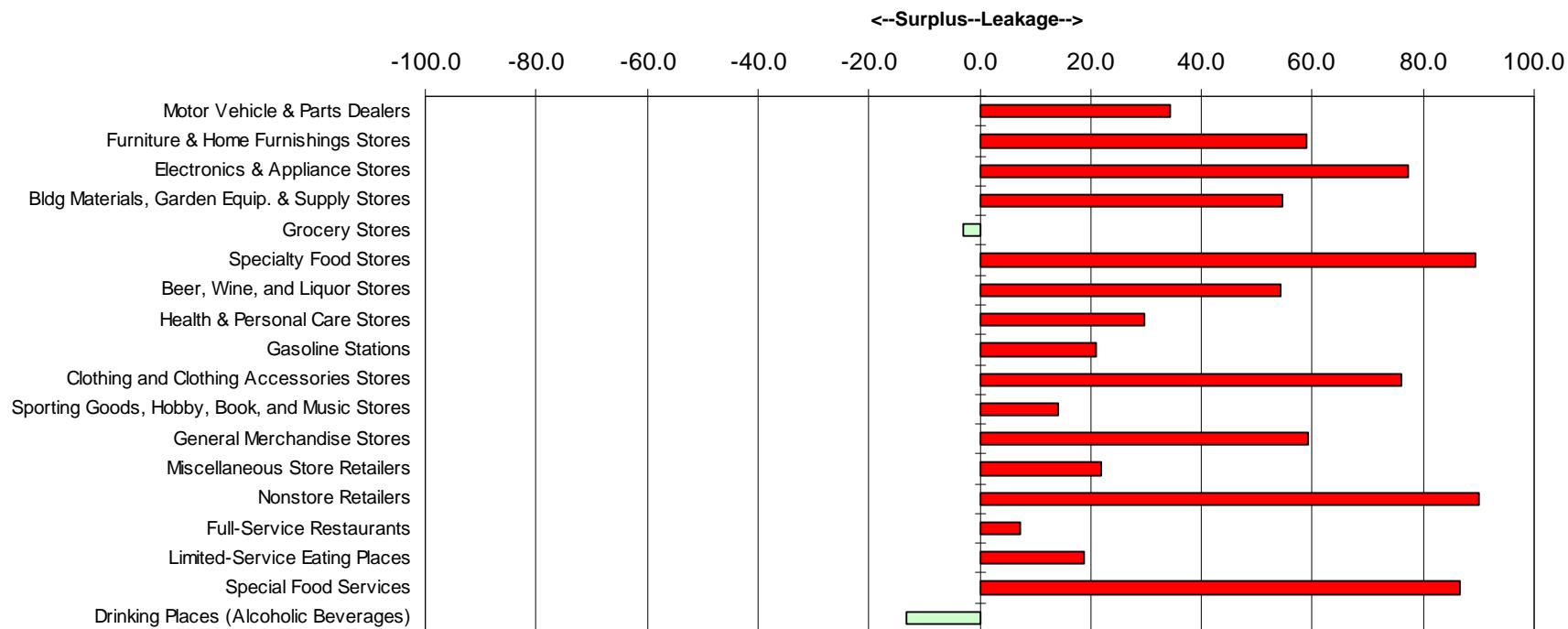
## Retail Market Profile

**Retail Gap = \$126 million**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$290,131,114	\$163,880,855	\$126,250,259	27.8	181
Total Retail Trade (NAICS 44-45)	\$247,421,959	\$132,790,107	\$114,631,852	30.1	124
Total Food & Drink (NAICS 722)	\$42,709,155	\$31,090,748	\$11,618,407	15.7	57

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



## 122<sup>nd</sup>-Division Analysis Area

### Employment

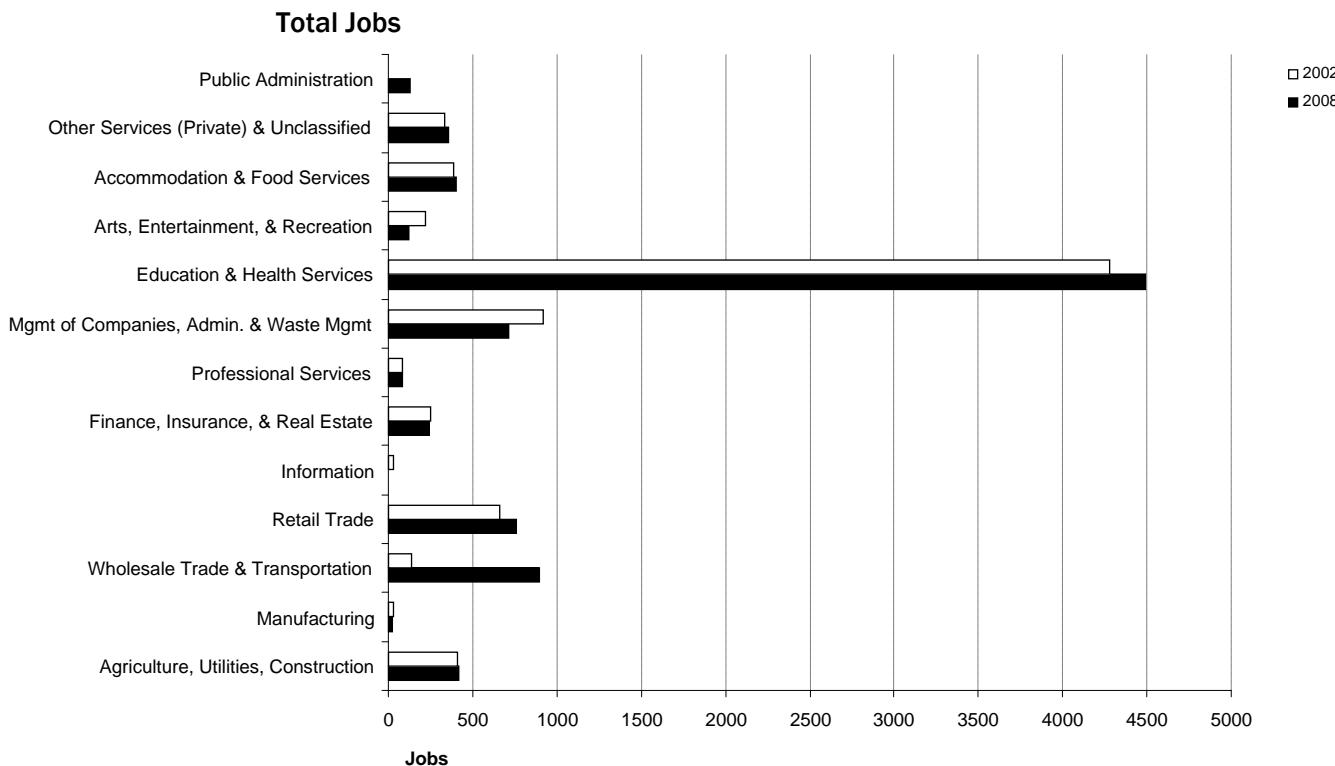
Quarterly Census of Employment and Wages data for 2002 & 2008

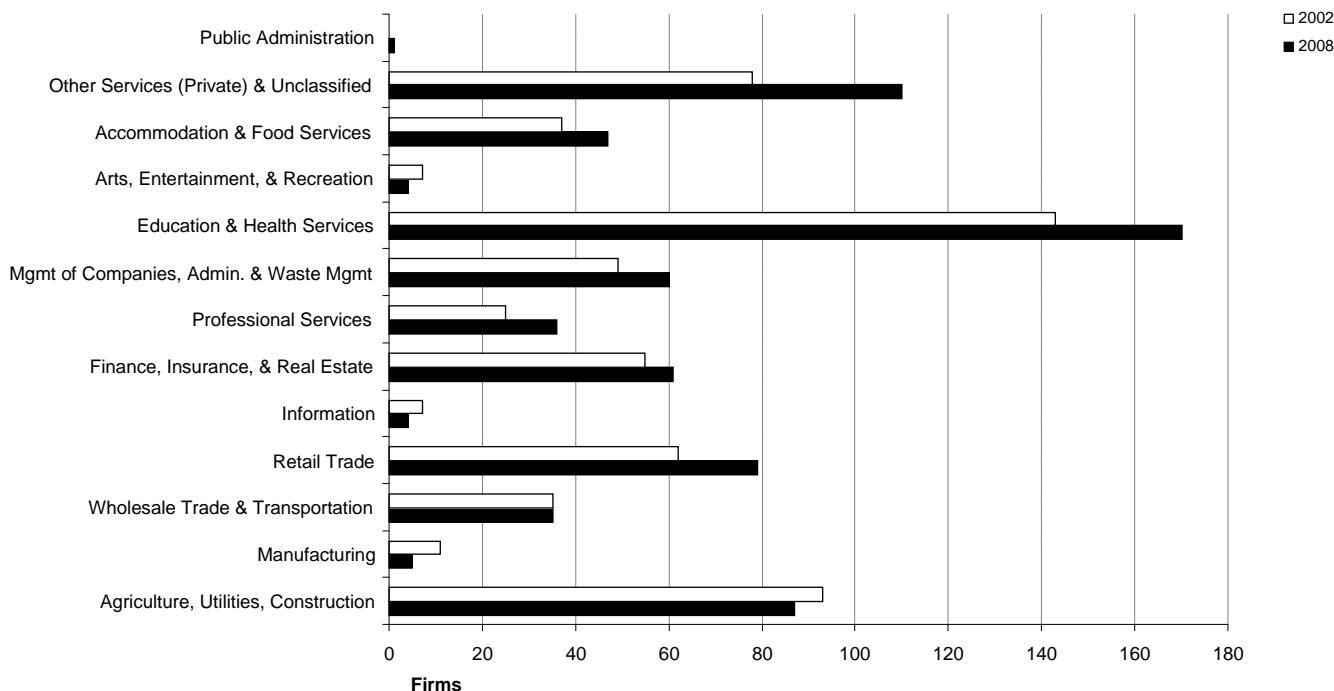
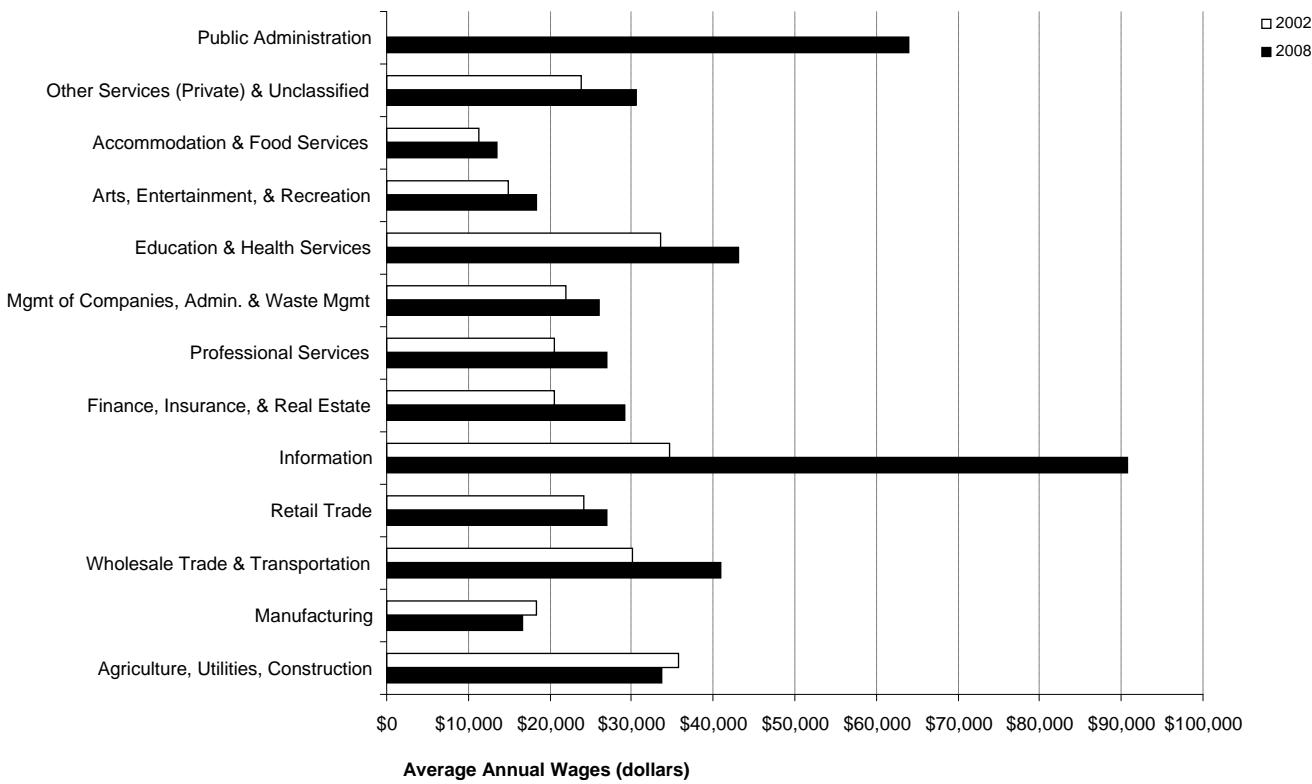
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	7,773	8,642	+909
Total Firms	602	699	+97
Average Annual Wages	\$29,253	\$37,347	+8,094



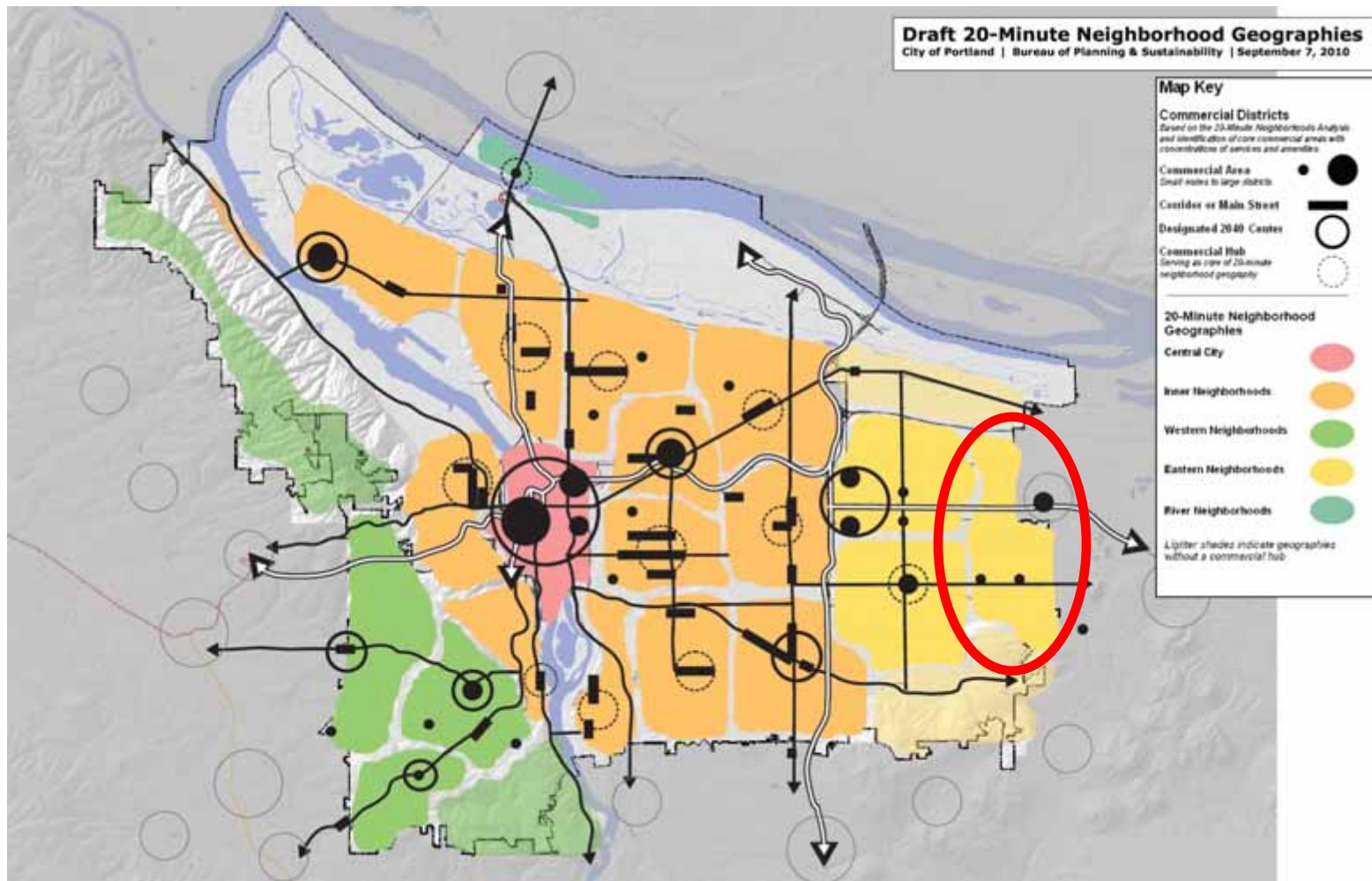
**Total Firms****Average Annual Wages**



## Centennial-Glenfair-Wilkes Analysis Area

Including Centennial, Glenfair, and Wilkes neighborhoods

### Services, Demographics and Market Summary



### 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Centennial-Glenfair-Wilkes Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 31,100 people (11,400 households)  
Land Area: 4.5 sq. miles (7,100 people per sq. mile)*

The area has several small clusters of commercial services, the largest of these located at SE Division and 148<sup>th</sup> Avenue and at SE Division and 162<sup>nd</sup> Avenue. The largest nearby concentration of commercial services is in Rockwood, located just outside the eastern edge of the analysis area in Gresham.

**Grocery stores:** 3 (1 store per 3,800 households)

**Retail gap:** \$142 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	80%
Within 1/2 mile of a public elementary school:	23%
Within 3 miles of a full-service community center*:	31%
Within 1/2 mile of a full-service grocery store:	20%
Within 1/4 mile of a frequent service transit stop:	18%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** None (Rockwood Library located just outside eastern edge of analysis area in Gresham)

**Parks and Open Spaces:** 87 acres – including Glenfair, Parklane, Lynchview, and Lynchwood parks. Powell Butte Nature Park is located at the southern edge of the analysis area and the Glendoveer golf course is to the west.

**Tree Canopy Coverage:** 24%

**Public Schools:** 7 elementary schools (Margaret Scott, Glenfair, Four Corners, Harold Oliver, Alder, Lynch View, and Lynch Wood elementary schools)\*

*\*Middle and high schools serving the area (Reynolds and Centennial school districts) are located east of the analysis area in Gresham and Troutdale.*

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** 2 (E. 148<sup>th</sup> and E. 162<sup>nd</sup> light rail stations)

**Walkable Access Score:** 46 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Centennial, Glenfair, and Wilkes

**Business Associations:** Gateway Area and Midway business associations

## Urban Form Characteristics

The area includes a diverse mix of block types, some rectangular with deep lots, while others are curvilinear in form, and many streets lack sidewalks. The area's small amount of commercial services are primarily in the form of auto-oriented development at major street intersections. Powell Butte serves as the area's most prominent natural feature and southern boundary. The area's skyline is also defined by groves of Douglas Fir, especially around the Glendoveer golf course.

**Access issues.** The area lacks good street connectivity and many secondary streets and some major streets lack continuous sidewalks. These conditions, combined with infrequent signalized crosswalks on the area's major streets, limit pedestrian access to the area's limited amount of commercial and community services. The area includes light rail stations along Burnside, but most residents live beyond convenient walking distance to these stations or other frequent transit service. The I-84 Freeway serves as a barrier to adjacent areas to the north.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	1.1 mile (Division)
Station Communities:	2

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,545	68%	264
Multi-Family Residential:	527	23%	174
Commercial/Mixed-Use:	133	6%	64
Employment:	14	.6%	8
Industrial:	0	0%	0
Open Space:	55	2%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

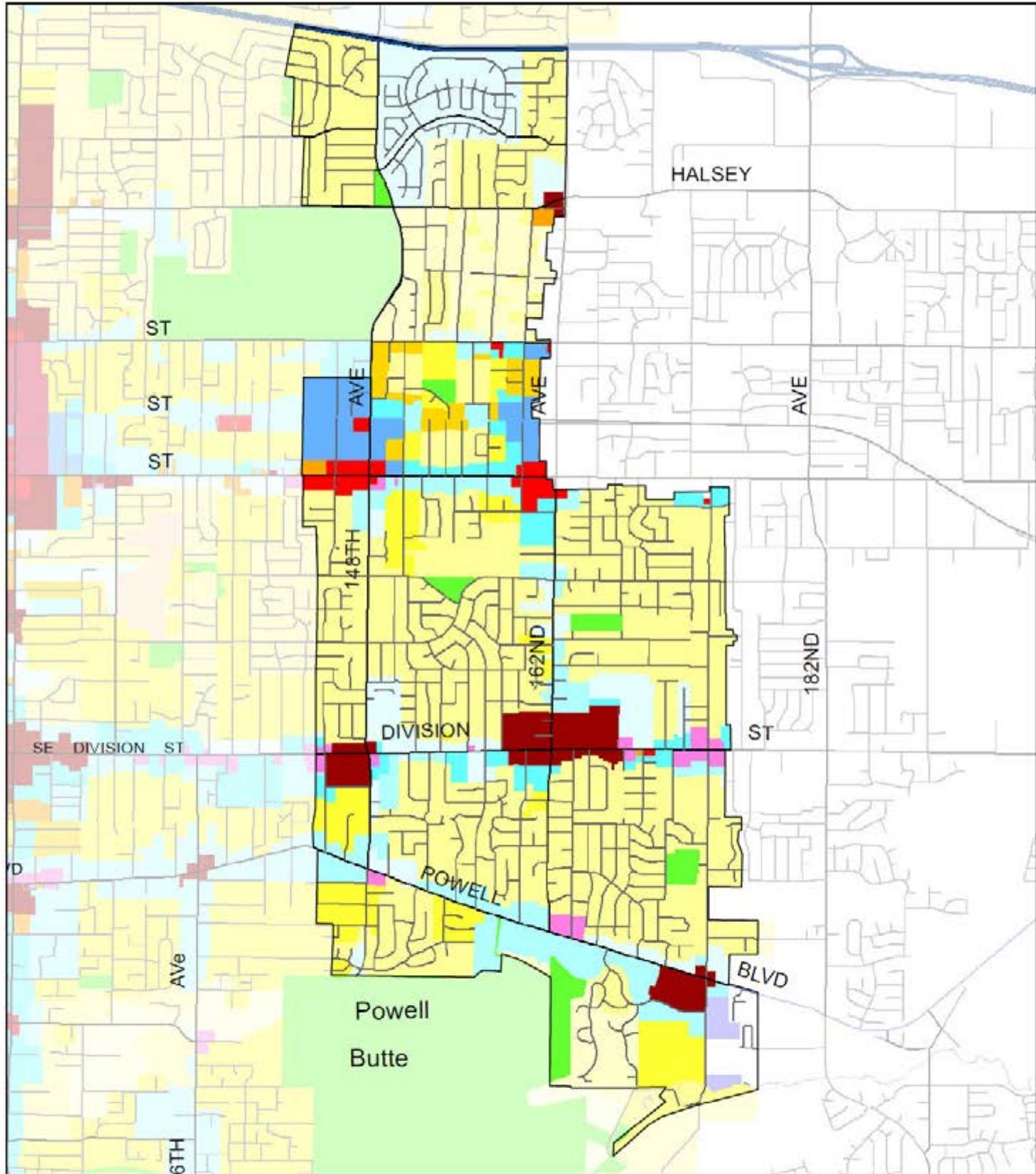
2010 Housing Units (Census):	11,946
2035 Housing Units:	17,800

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Centennial-Glenfair-Wilkes Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000  
Feet

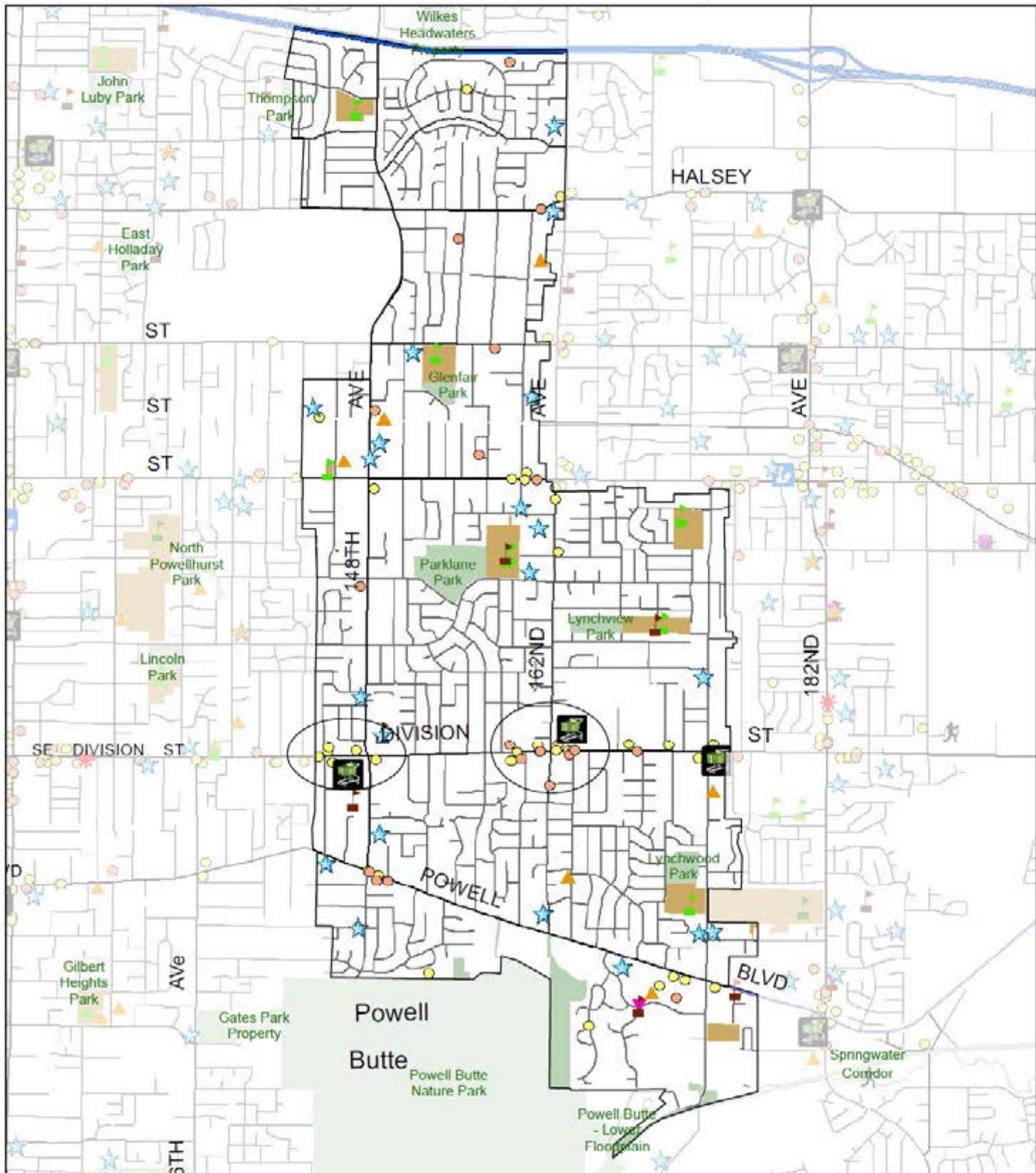


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City of Portland, Oregon  
Sam Adams, Mayor • Jason Anderson, Director

# Centennial-Glenfair-Wilkes Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Libraries
- Preschools
- Daycare Centers
- Farmers Markets
- Community Gardens
- Public HS
- Public K-8
- Community Centers
- County Health Clinic
- County Aging Services
- Private Schools



0 1,000 2,000 3,000 Feet

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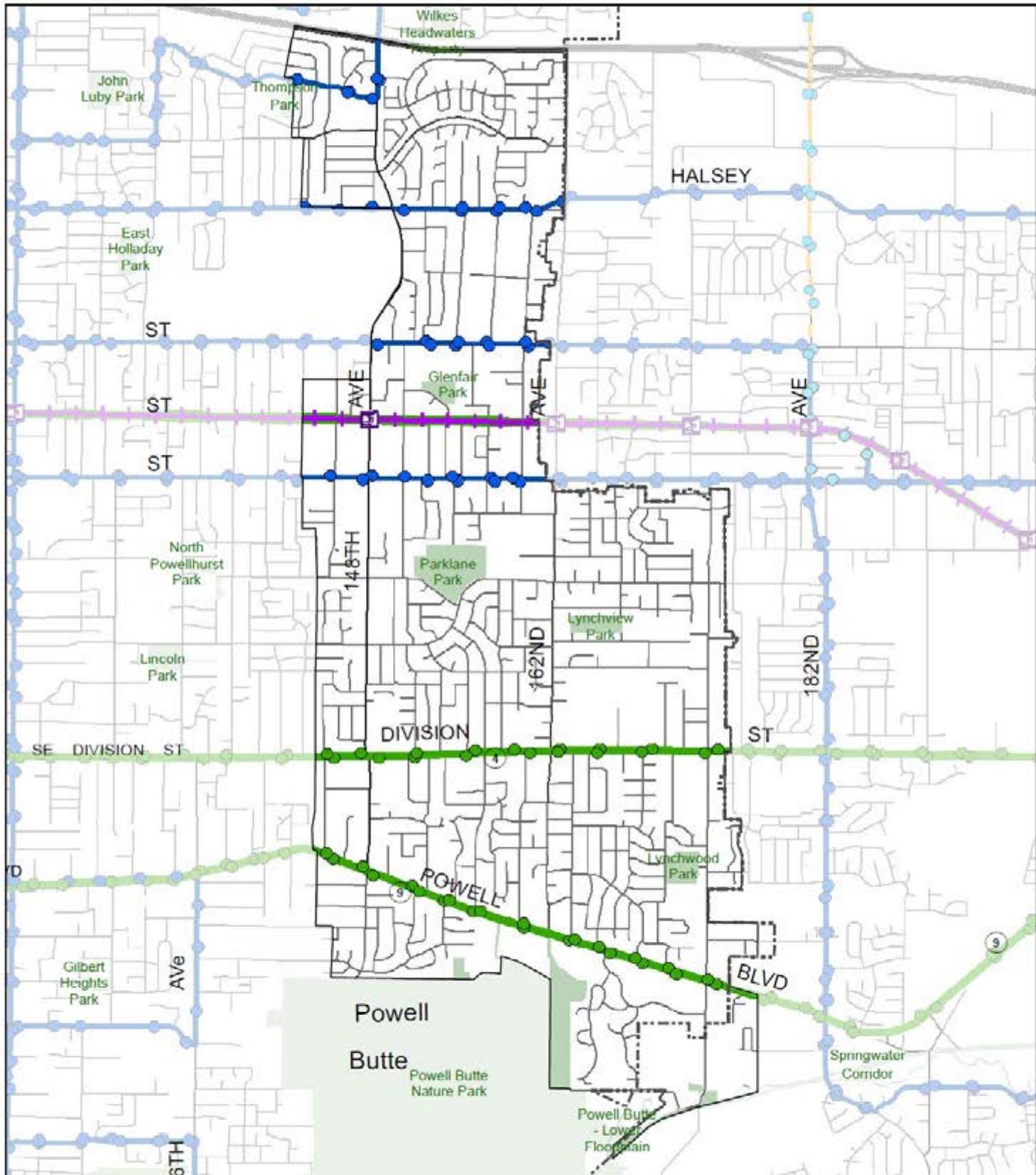


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City of Portland Oregon  
Sam Adams Mayor - Jason Antonio Director

# Centennial-Glenfair-Wilkes Analysis Area



## Transit Infrastructure

February 1, 2012

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- |                         |                          |
|-------------------------|--------------------------|
| <b>Light Rail Stops</b> | <b>Bus Stops</b>         |
| MAX                     | Frequent Stops           |
| Street Car              | Standard Stops           |
| MAX                     | Rush Hour Stops          |
| Streetcar               |                          |
|                         | — Frequent Service       |
|                         | — Standard Service       |
|                         | — Rush Hour Only Service |
|                         | - - - City Boundary      |



0 1,000 2,000 3,000 Feet

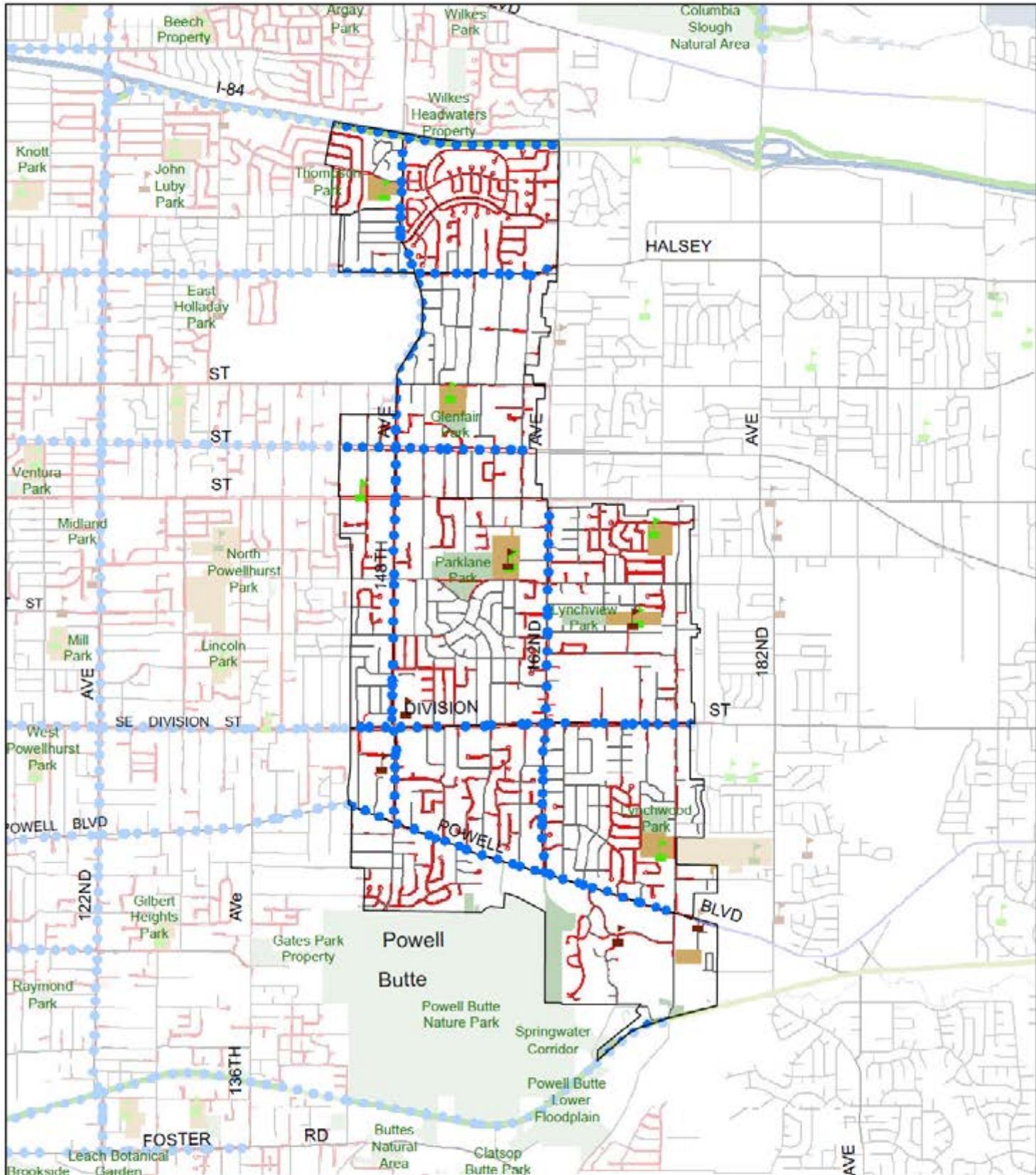


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City of Portland, Oregon  
John Adams, Mayor • Jason Anderson, Director

# Centennial-Glenfair-Wilkes Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000  
Feet

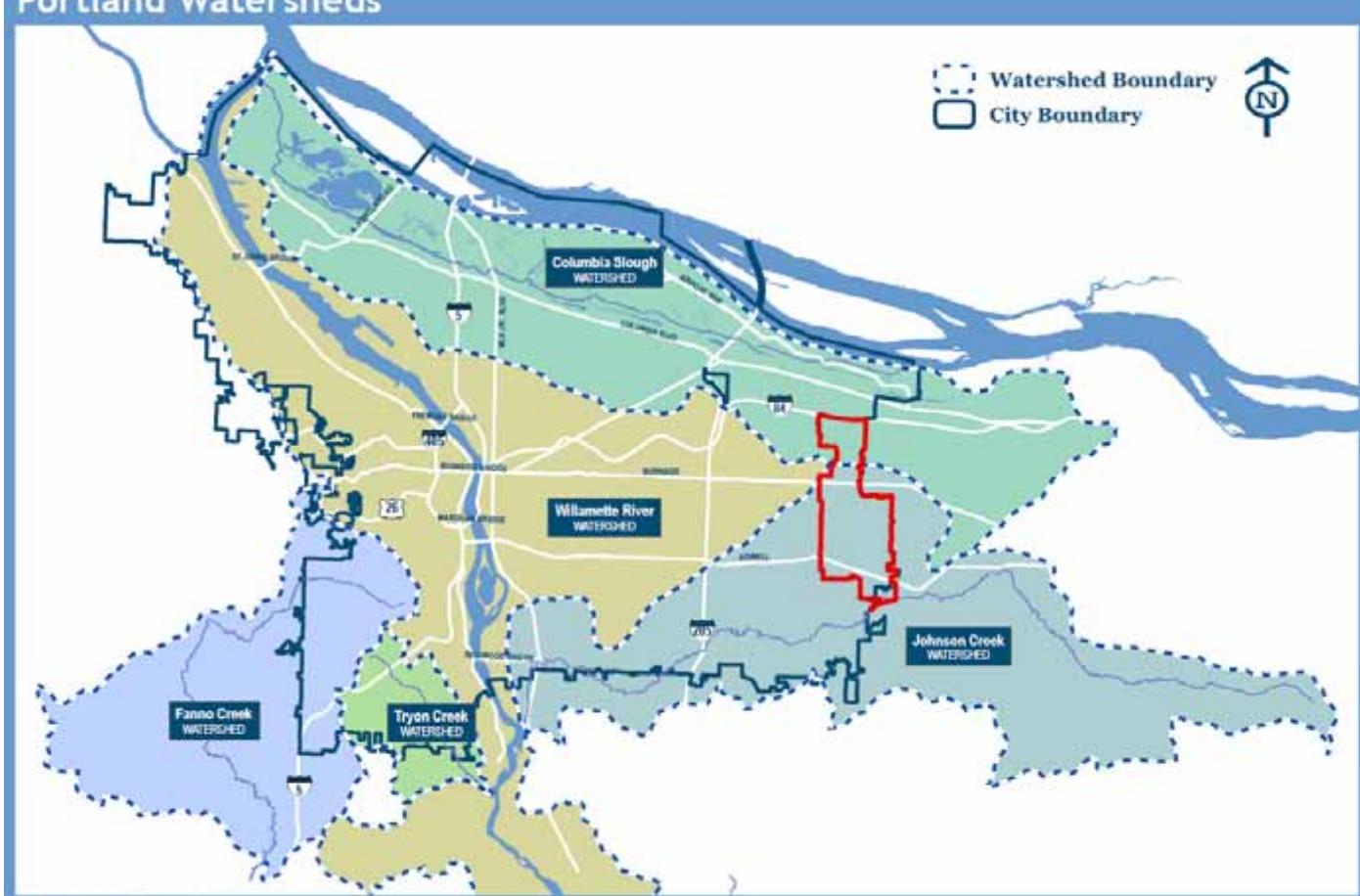


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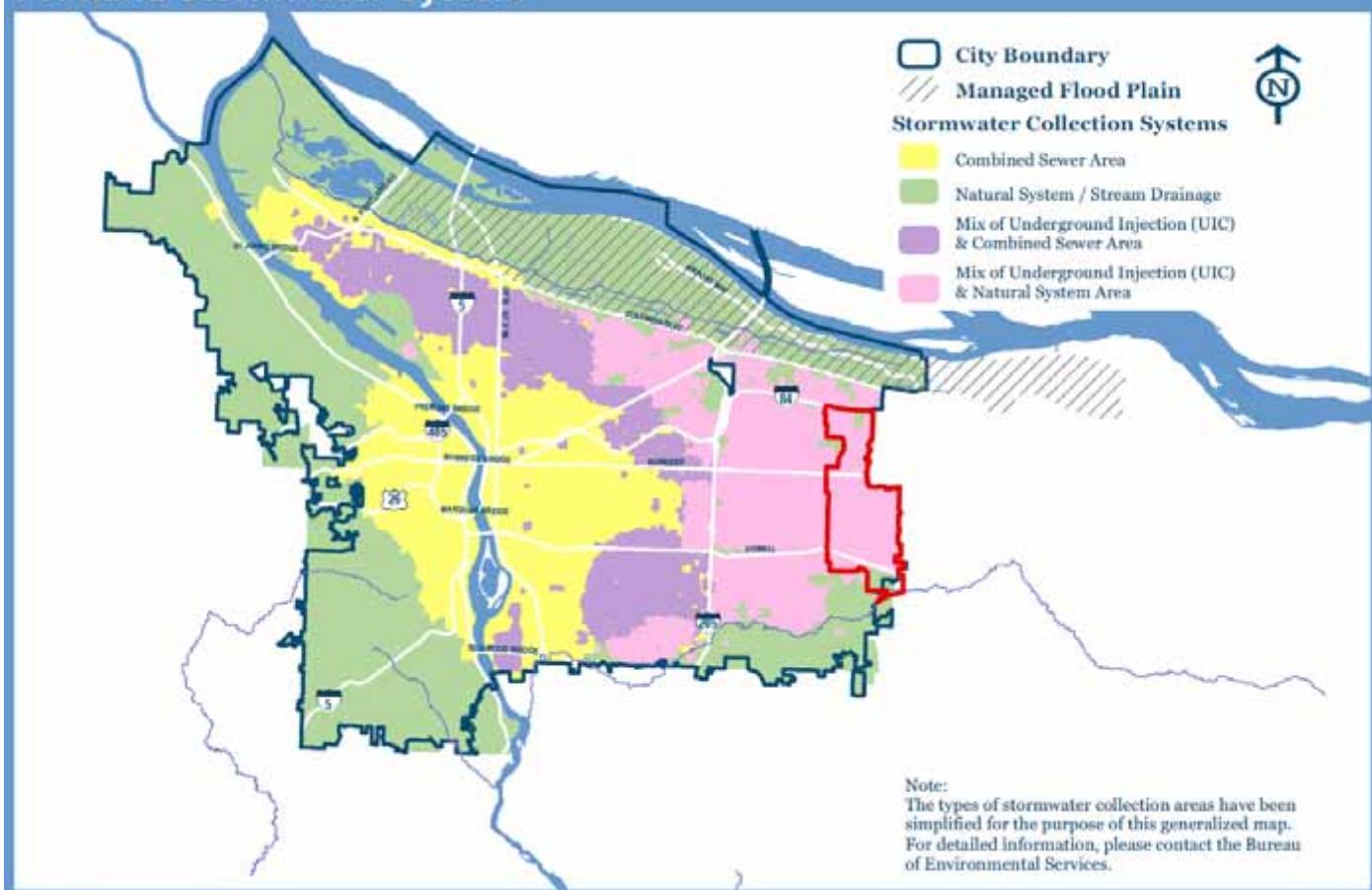


City of Portland, Oregon  
Tom Adams, Mayor • Sam Adams, Director

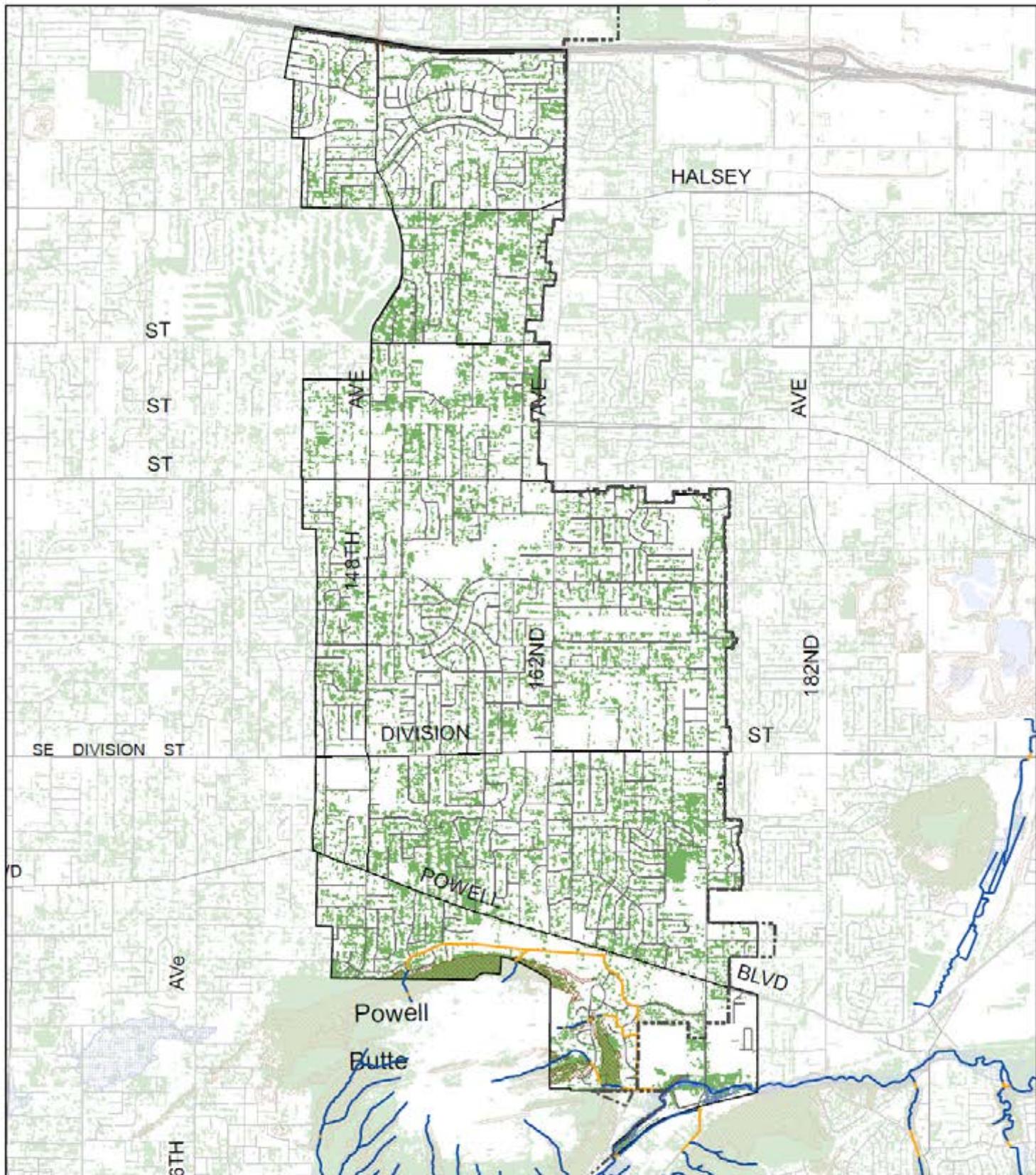
## Portland Watersheds



## Portland Stormwater System



# Centennial-Glenfair-Wilkes Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000  
Feet



# Centennial-Glenfair-Wilkes Analysis Area

## Demographics (2000 – 2010)

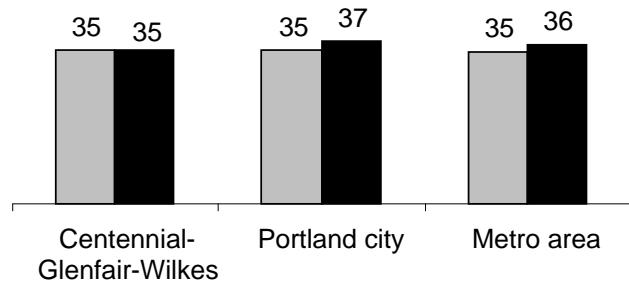
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

	Centennial-Glenfair-Wilkes	Portland city	Metro area
2010	31,147	583,776	2,226,009
2000	27,509	529,121	1,927,881
% change	13%	10%	15%

■ 2000 ■ 2010

### Median Age

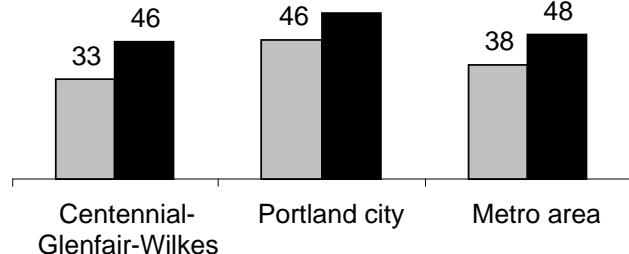


### Average Household Size

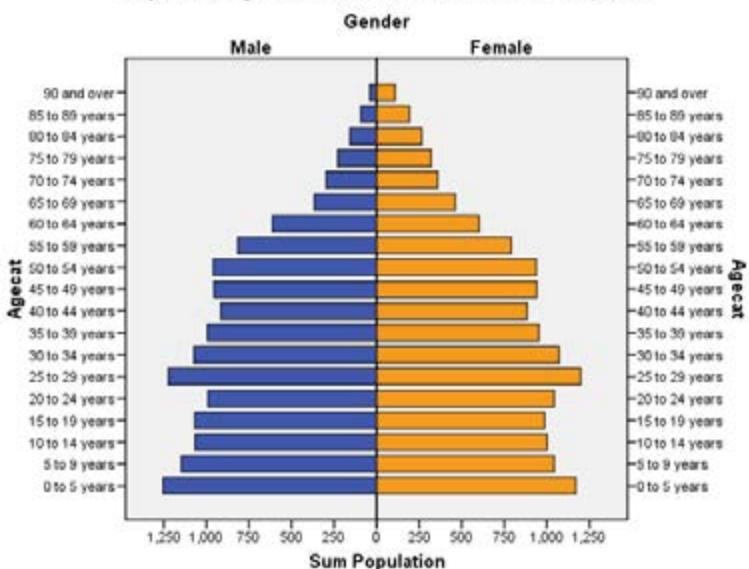


### Diversity Index

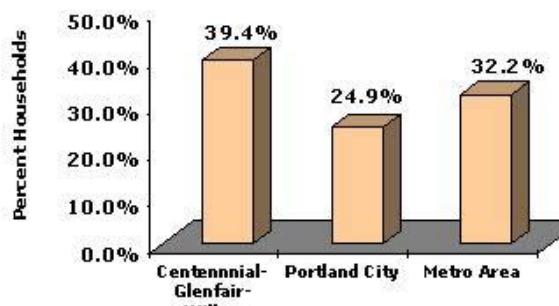
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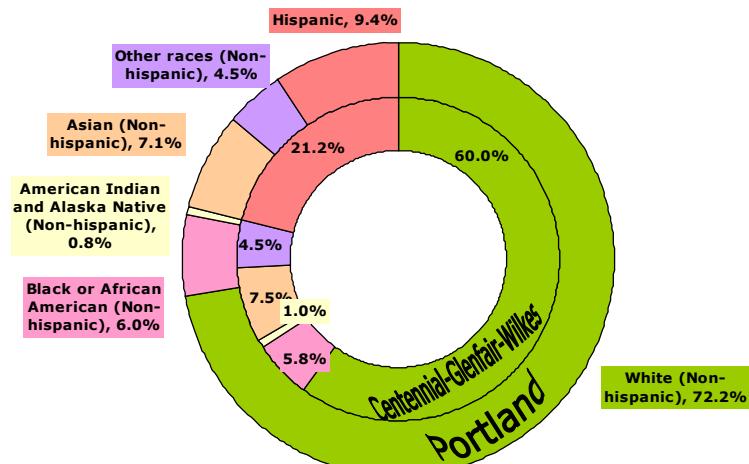
Population Pyramid for Centennial-Glenfair-Wilkes, 2010



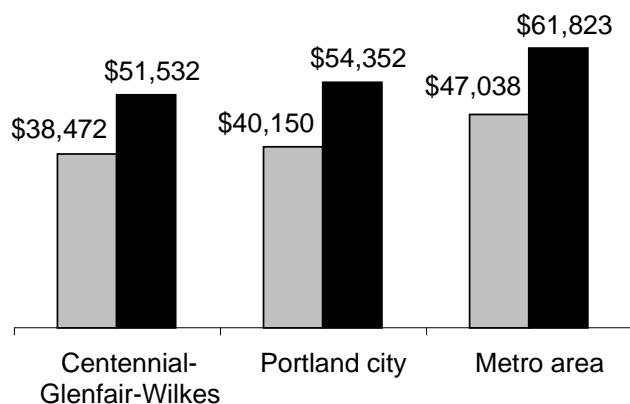
Households with Children Under 18 Years: 2010



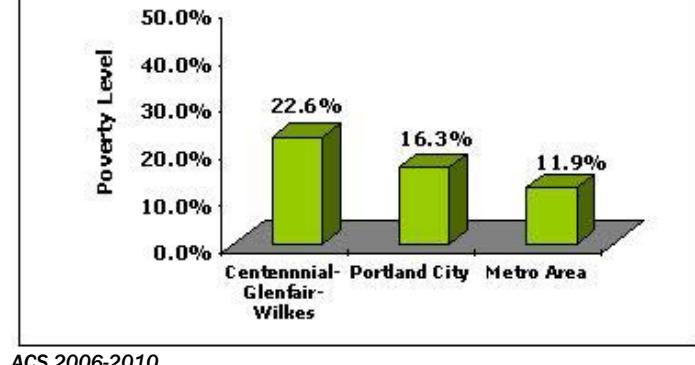
Racial and Ethnic Distribution in Portland vs. Centennial-Glenfair-Wilkes



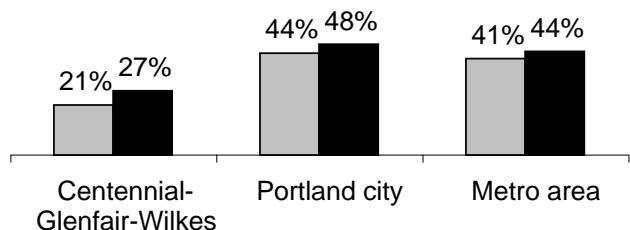
## Median Household Income



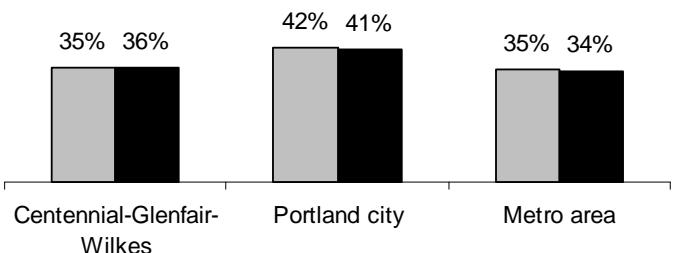
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Centennial-Glenfair-Wilkes	Portland city	Metro area
2010	\$229,875	\$253,184	\$273,500
2000	\$143,259	\$154,721	\$168,347
% change	60.5%	63.6%	62.5%

# Centennial-Glenfair-Wilkes Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

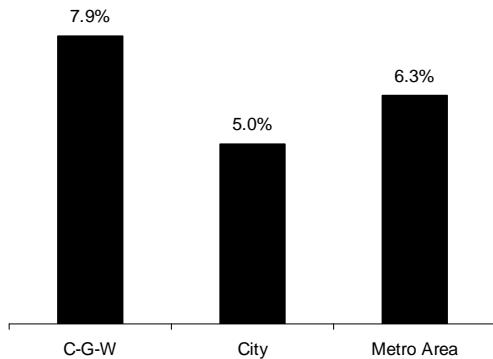
C-G-W	City	Metro Area
818,117	51,937,895	107,875,146

### OFFICE SPACE

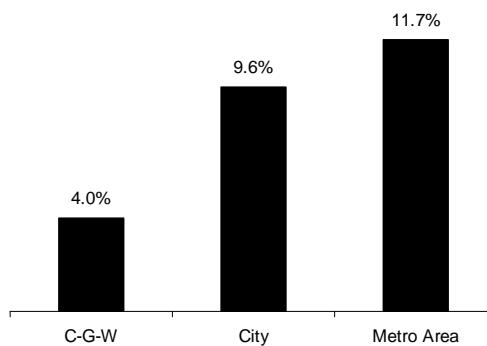
#### Square Feet

C-G-W	City	Metro Area
88,150	54,348,765	92,465,455

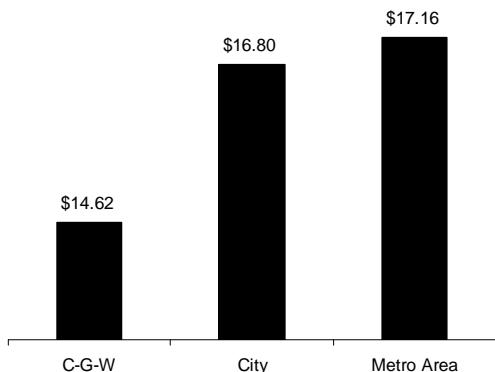
#### Retail Vacancy



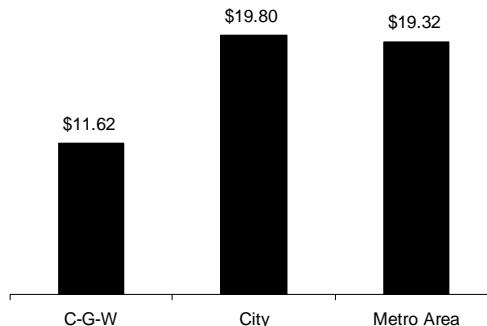
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Centennial-Glenfair-Wilkes Analysis Area

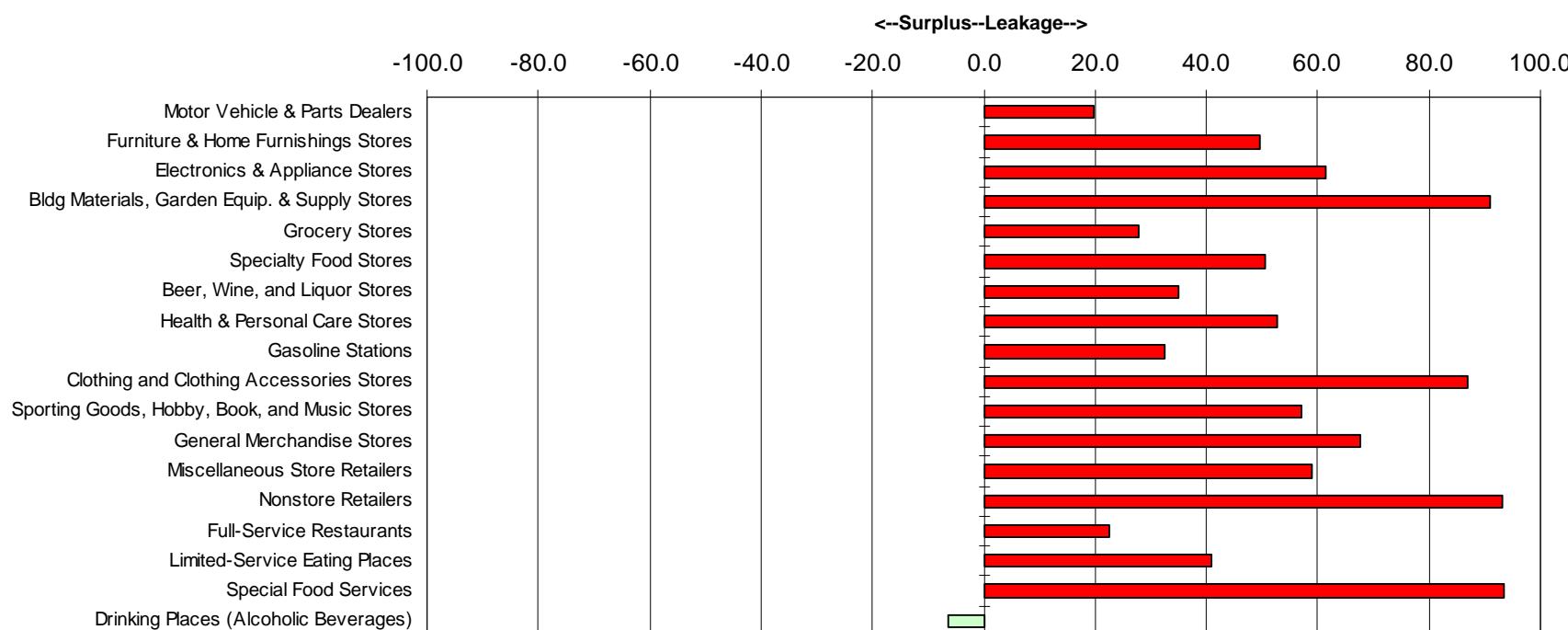
## Retail Market Profile

**Retail Gap = \$142 million**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$252,384,865	\$110,882,506	<b>\$141,502,359</b>	<b>39.0</b>	127
Total Retail Trade (NAICS 44-45)	\$215,508,193	\$92,018,190	<b>\$123,490,003</b>	<b>40.2</b>	84
Total Food & Drink (NAICS 722)	\$36,876,672	\$18,864,316	<b>\$18,012,356</b>	<b>32.3</b>	43

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Centennial-Glenfair-Wilkes Analysis Area

## Employment

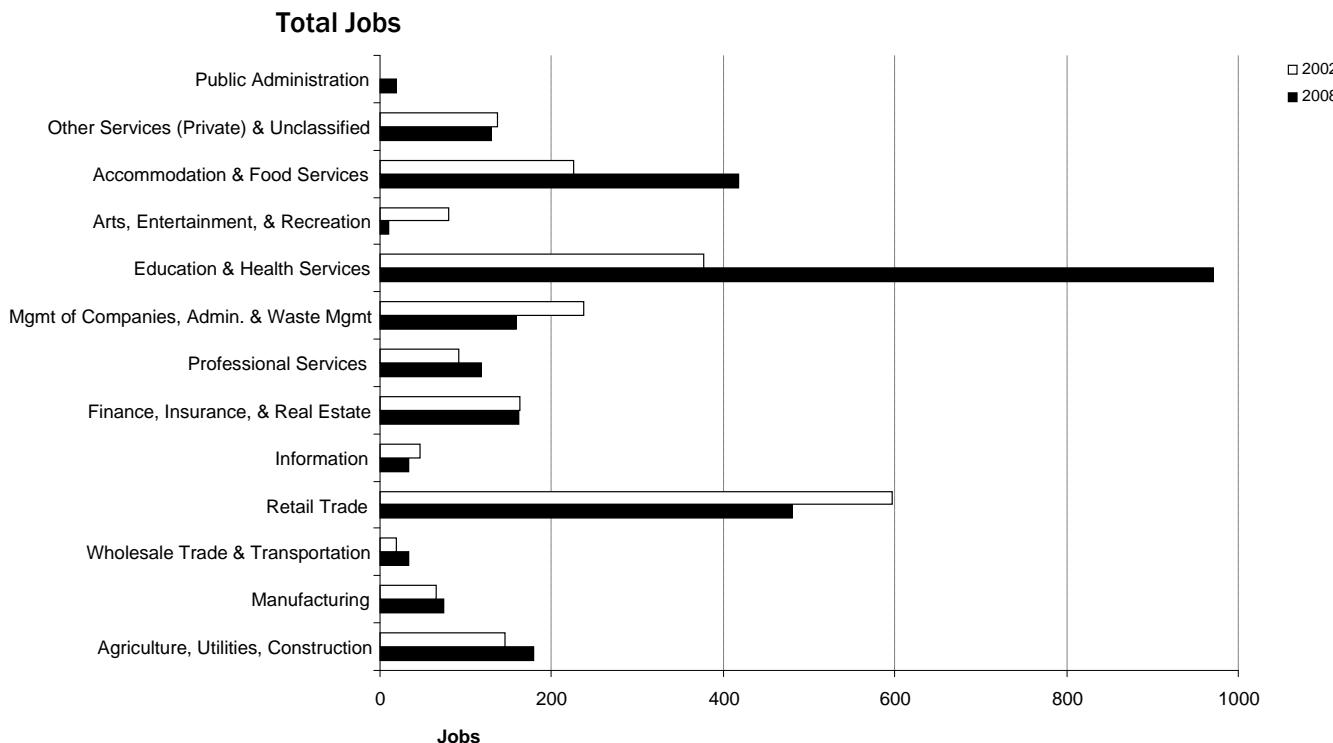
Quarterly Census of Employment and Wages data for 2002 & 2008

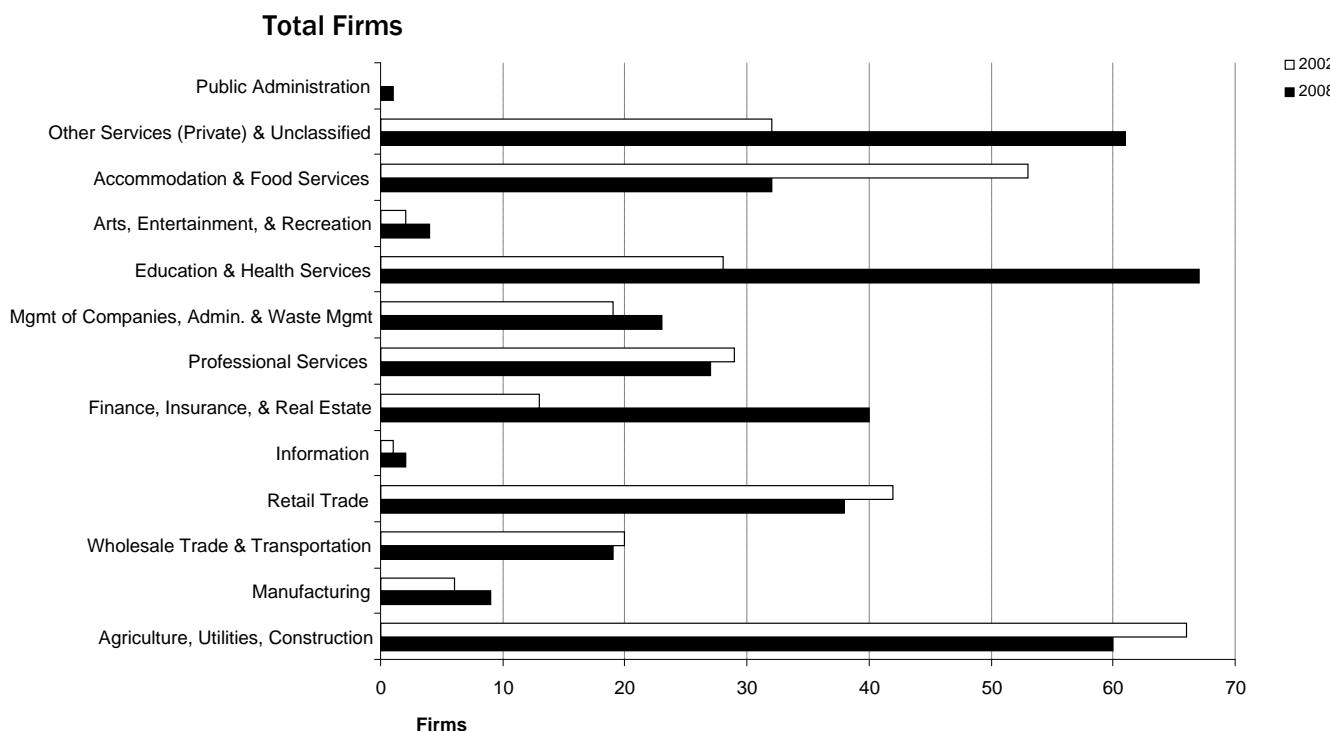
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

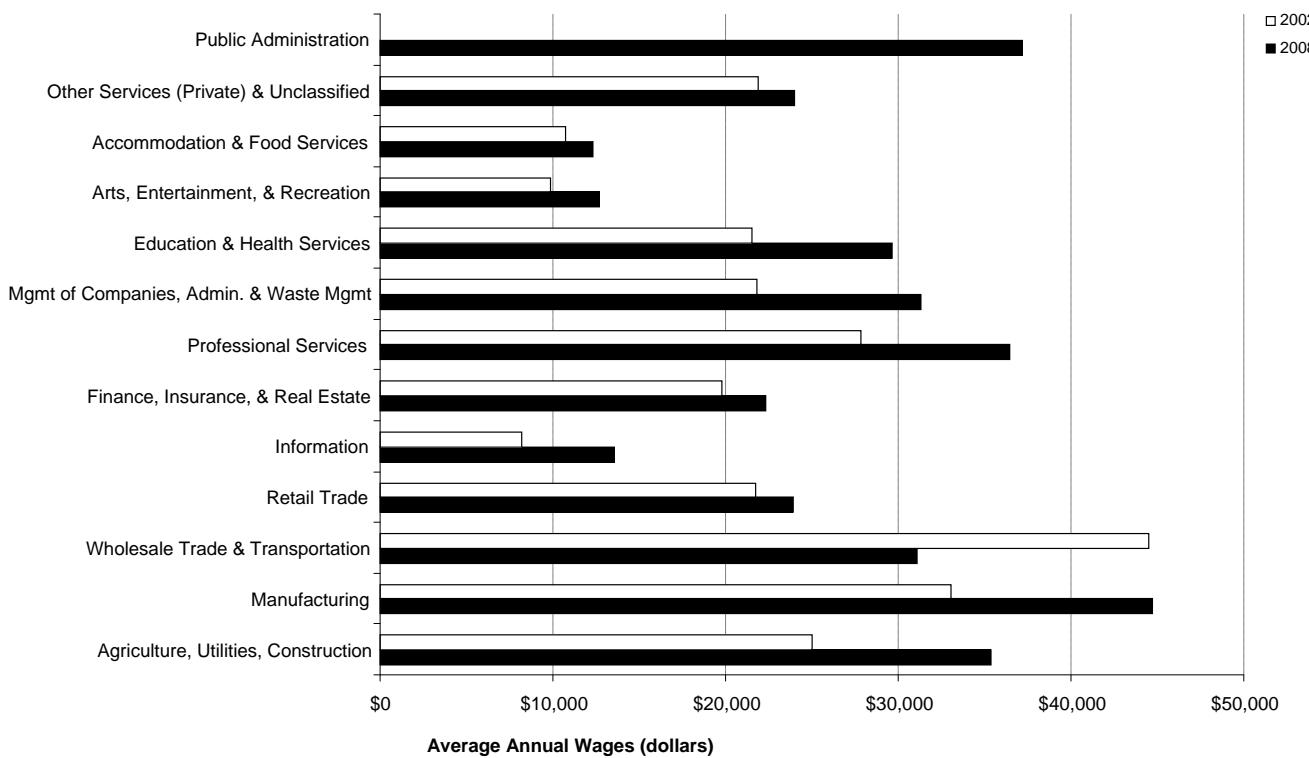
*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	2,185	2,788	+603
Total Firms	311	383	+72
Average Annual Wages	\$20,654	\$26,340	+5,687





### Average Annual Wages

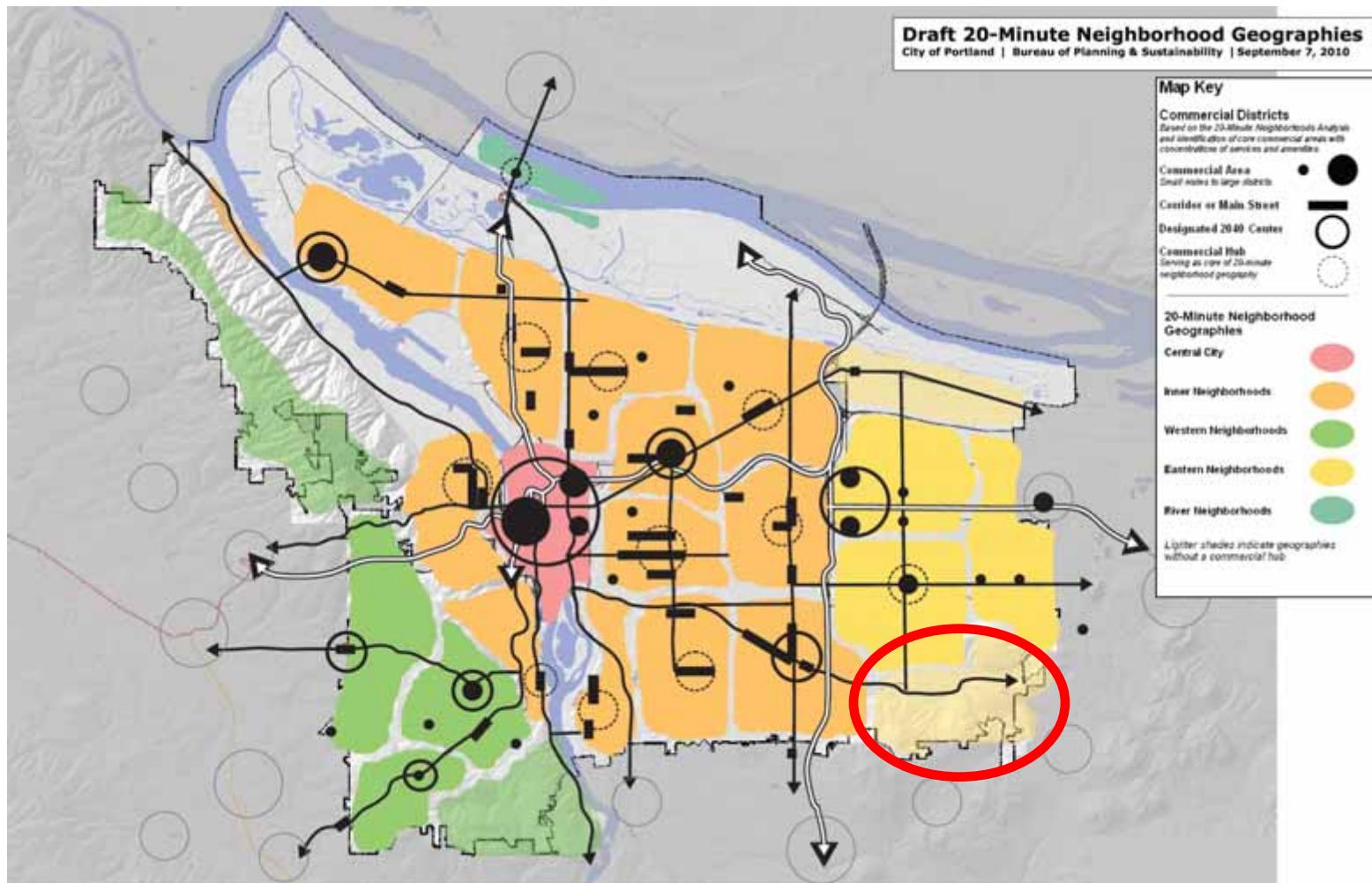




## Pleasant Valley Analysis Area

*Including Pleasant Valley and part of the Powellhurst-Gilbert neighborhood*

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# Pleasant Valley Analysis Area

## Services and Amenities

### Commercial Districts

Population: 11,800 people (3,800 households)  
Land Area: 5.2 sq. miles (2,300 people per sq. mile)

The area has no major concentrations of commercial services.

**Grocery stores:** None

**Retail gap:** \$91 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	62%
Within 1/2 mile of a public elementary school:	11%
Within 3 miles of a full-service community center*:	26%
Within 1/2 mile of a full-service grocery store:	0%
Within 1/4 mile of a frequent service transit stop:	0%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** None

**Parks and Open Spaces:** 1,301 acres – including Powell Butte Nature Park, Leach Botanical Garden, Gilbert Primary Park, Clatsop Butte Park, and the Buttes Natural Area.

**Tree Canopy Coverage:** 53%

**Public Schools:** 2 K-8 schools (Gilbert Park Elementary and Alice Ott Middle School)

**Colleges (campus):** 1 specialized (Birthingway College of Midwifery)

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None

**Walkable Access Score:** 15 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Pleasant Valley and part of Powellhurst-Gilbert

**Business Associations:** Foster Area Business Association

## Urban Form Characteristics

The area is characterized by the prominence of its natural features, including Powell Butte, Johnson Creek, and streams, ravines and forested hillsides south of Foster Road, below Clatsop Butte and Mt. Scott to the southwest. Areas along the north side of Foster Road feature large rectilinear blocks, while to the south roads are often curvilinear, following the hilly topography, where residential development is often in the form of clustered subdivisions set within natural features.

**Access issues.** The area lacks good street connectivity and many streets lack continuous sidewalks. The area has a relatively small population base, served by few commercial or community services and limited transit service. Natural features and infrequent street connections limit access to adjacent areas.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	0
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,929	63%	524
Multi-Family Residential:	95	3%	31
Commercial/Mixed-Use:	22	.7%	11
Employment:	0	0%	0
Industrial:	43	1%	1
Open Space:	985	32%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

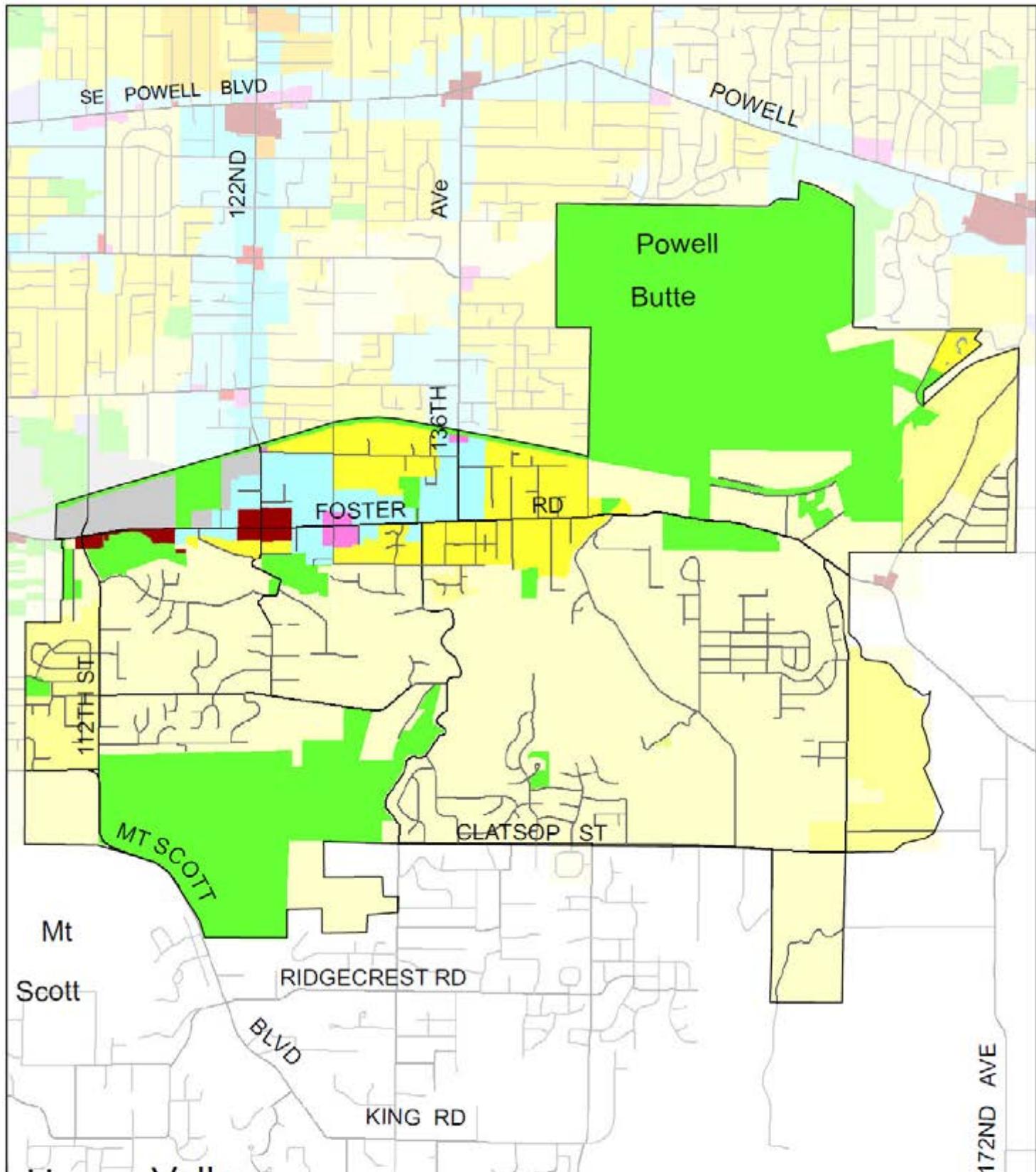
2010 Housing Units (Census):	3,938
2035 Housing Units:	6,100

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Pleasant Valley Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet

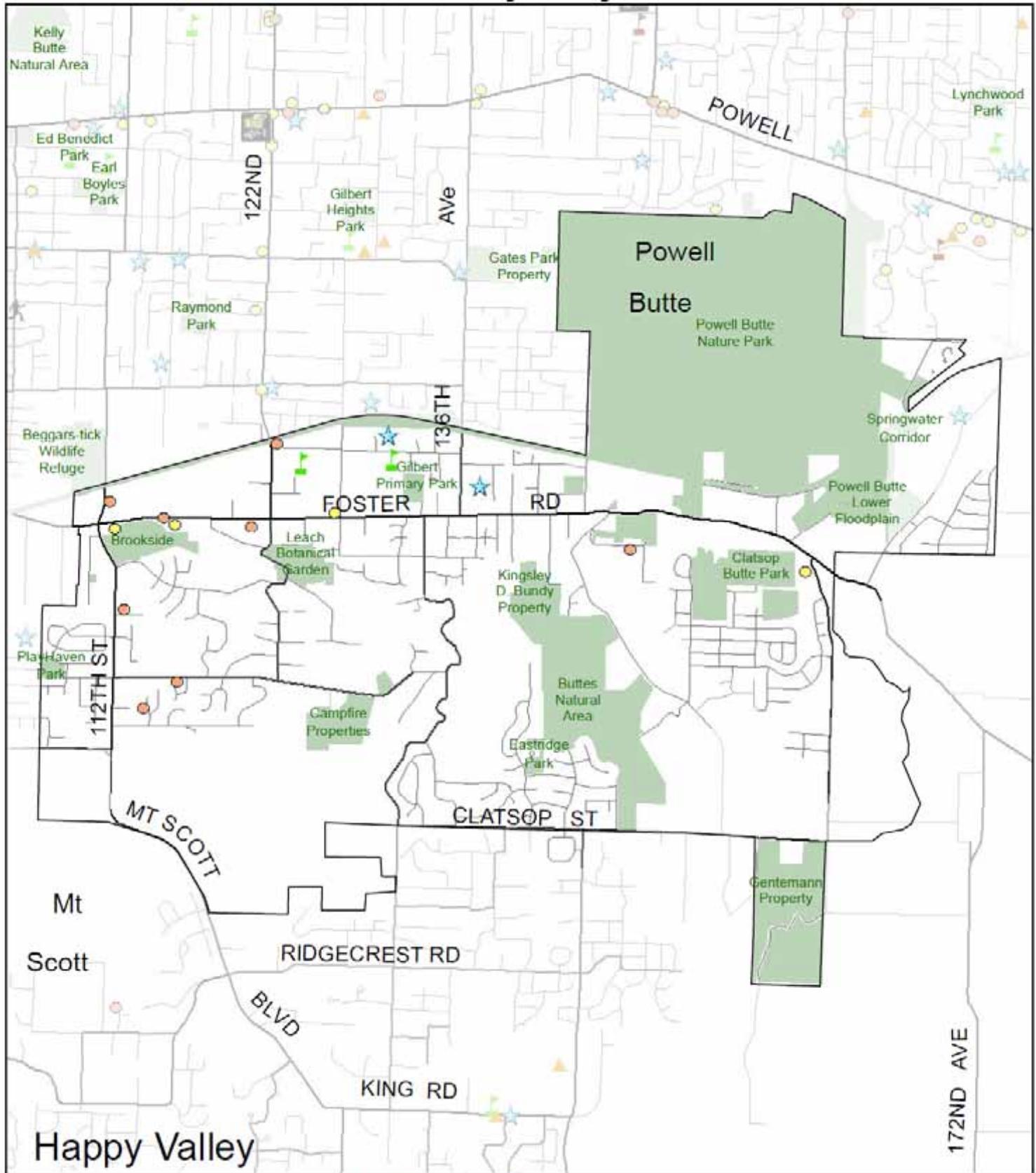


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# Pleasant Valley Analysis Area



## Services and Amenities



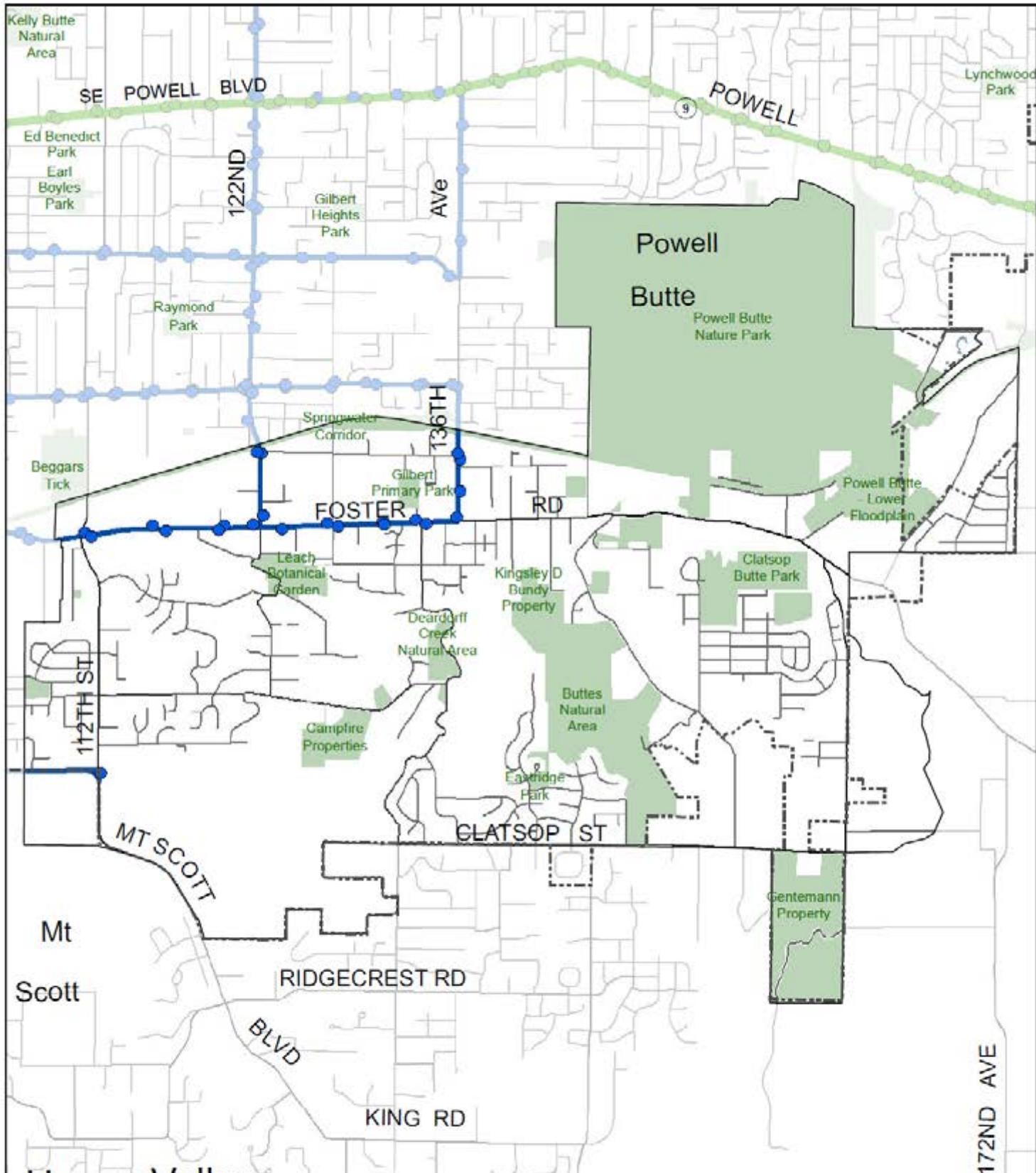
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commercial data from InfoUSA 2008

0 750 1,500 3,000 Feet

March 25, 2011

# Pleasant Valley Analysis Area



## Transit Infrastructure

February 1, 2012

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	Light Rail Stops	Bus Stops
MAX	■	Frequent Stops
Street Car	●	Standard Stops
MAX	■	Rush Hour Stops
Streetcar	■	
		■ Frequent Service
		■ Standard Service
		■ Rush Hour Only Service
		— City Boundary



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Feet

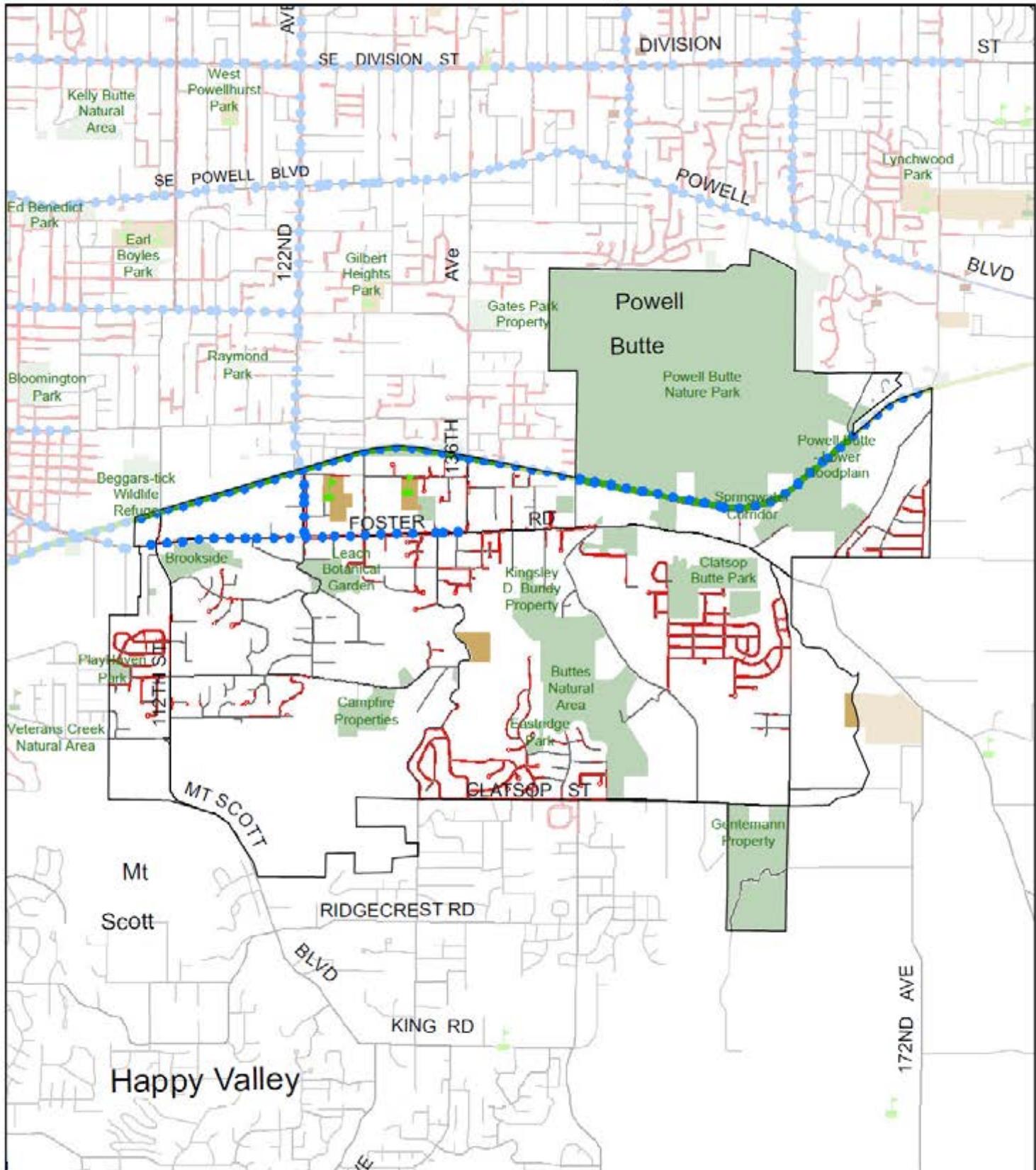


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John Adams, Mayor • Jason Anderson, Director

# Pleasant Valley Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland
- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000  
Feet

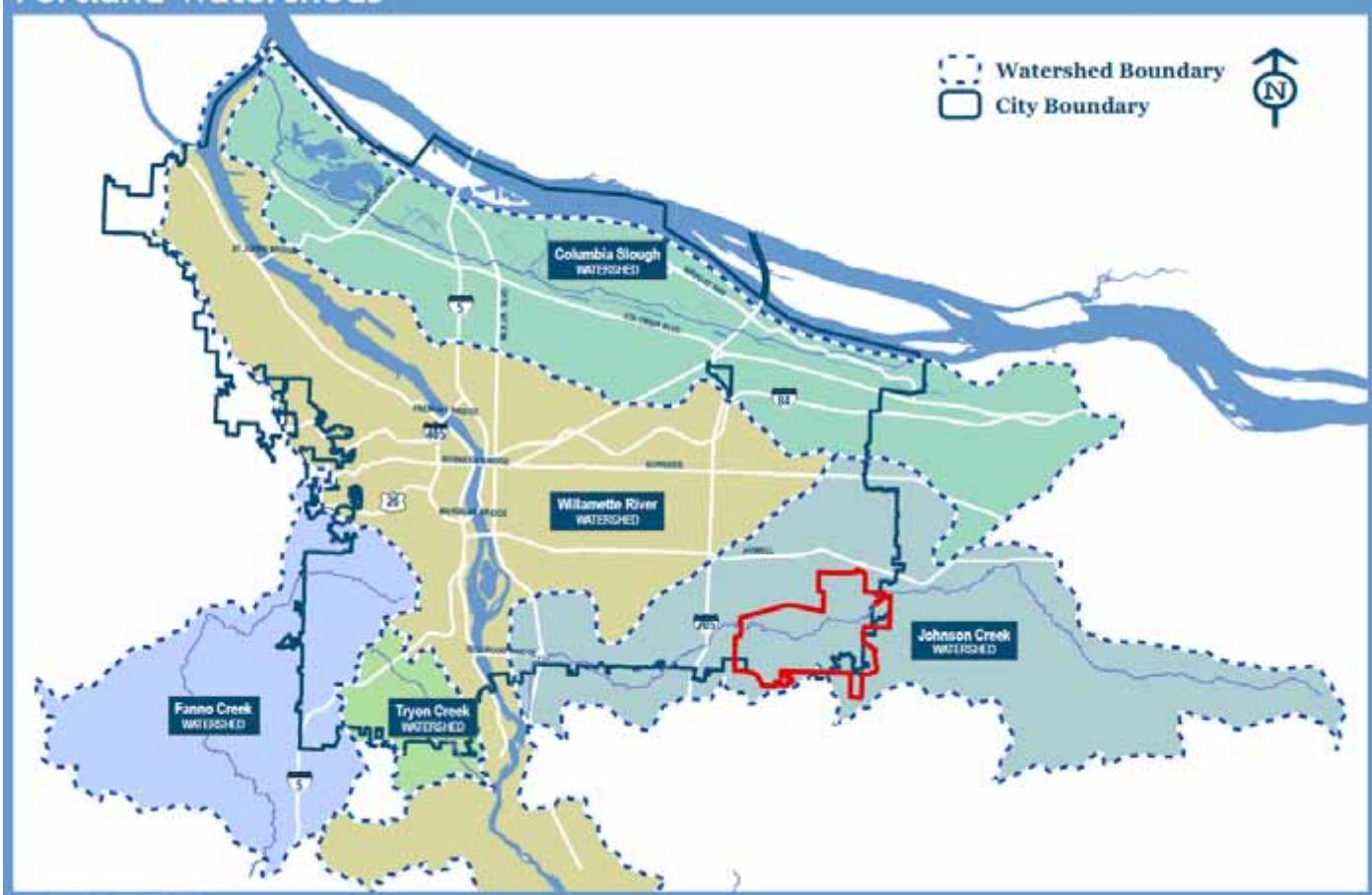


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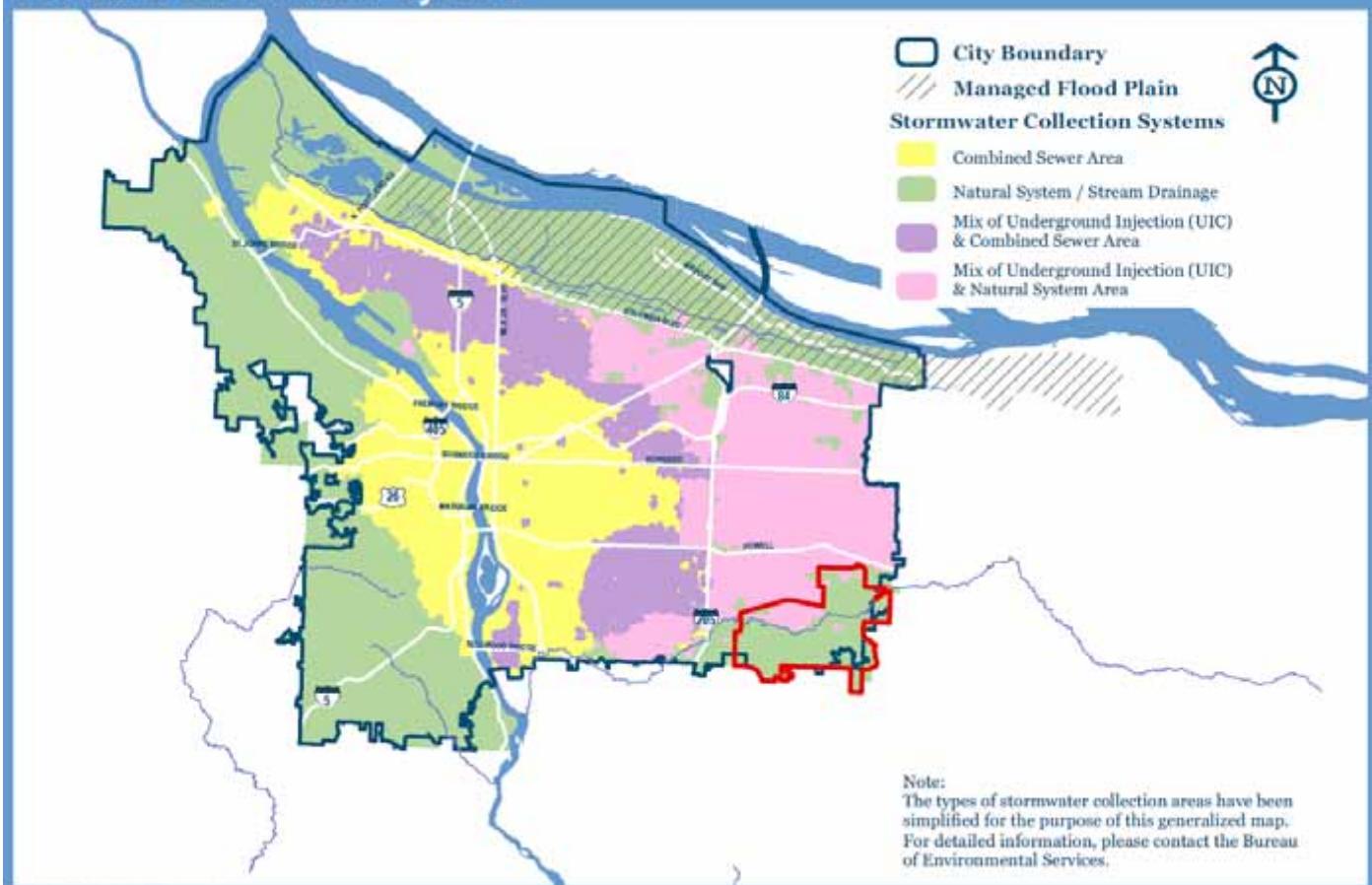


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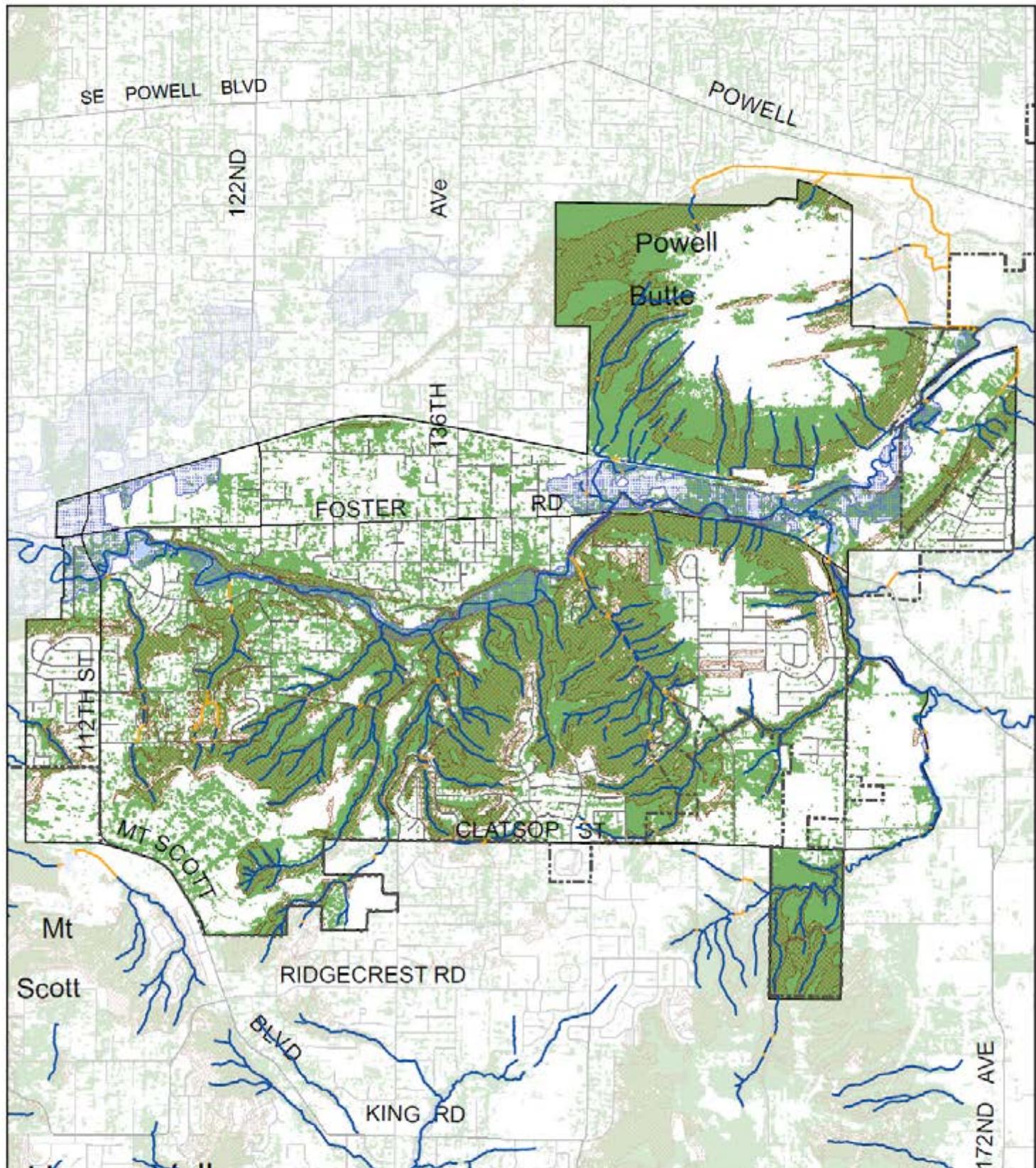
## Portland Watersheds



## Portland Stormwater System



# Pleasant Valley Analysis Area



## Watersheds and Natural Features

- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



August 9, 2011

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City of Portland Bureau of Planning and Sustainability

17-9

# Pleasant Valley Analysis Area

## Demographics (2000 – 2010)

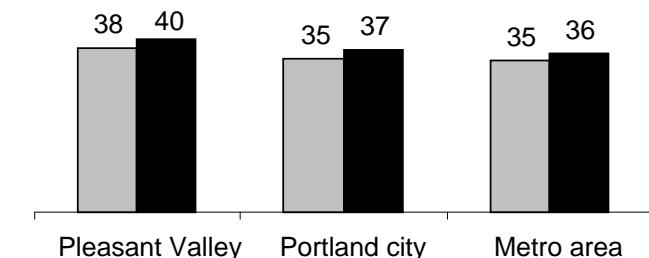
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

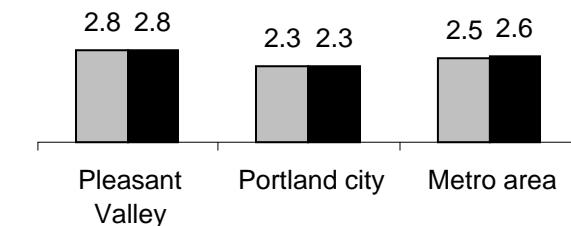
	Pleasant Valley	Portland city	Metro area
2010	11,809	583,776	2,226,009
2000	7,405	529,121	1,927,881
% change	59%	10%	15%

■ 2000 ■ 2010

### Median Age

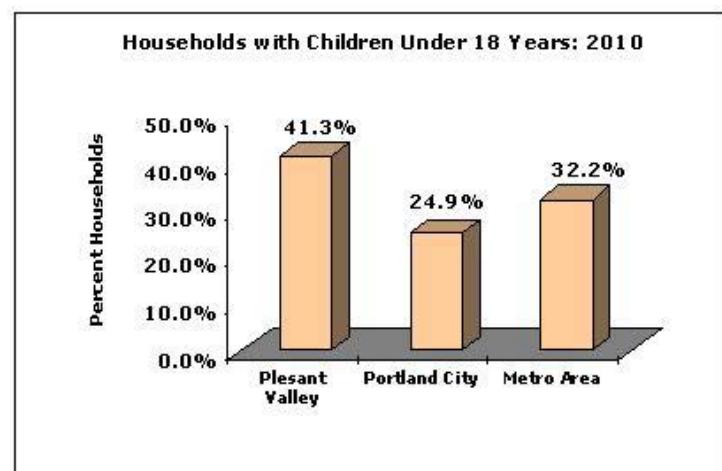
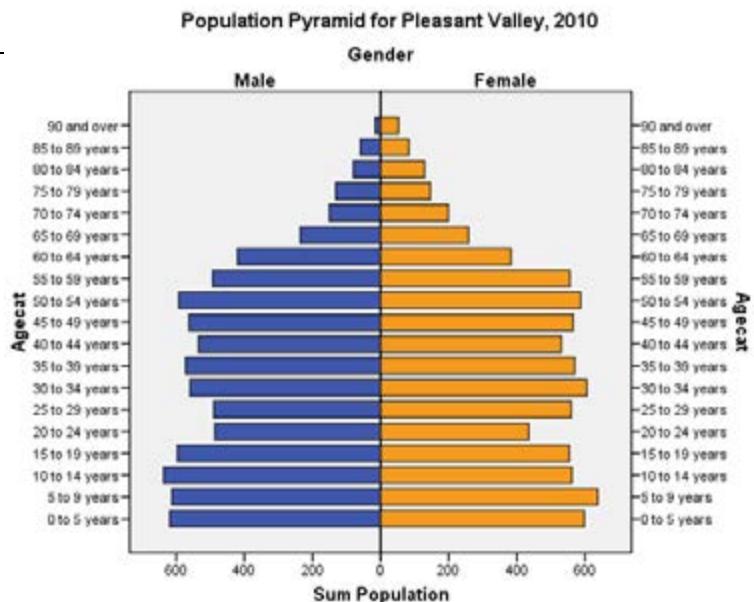
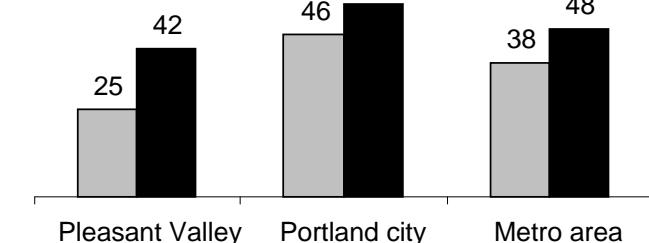


### Average Household Size

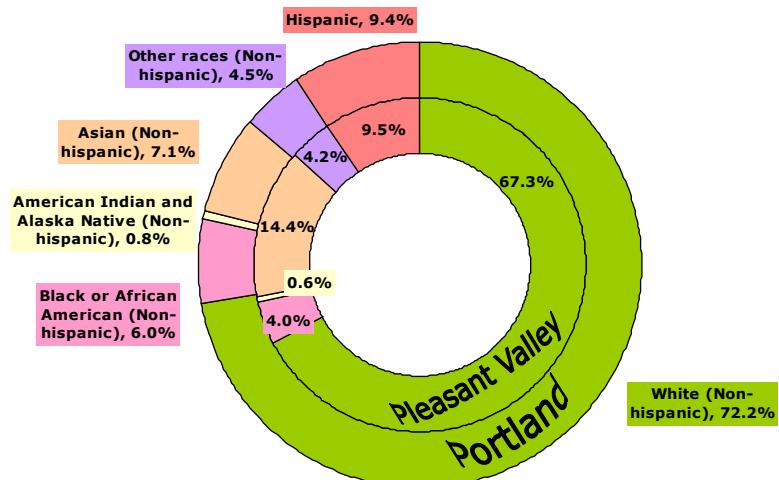


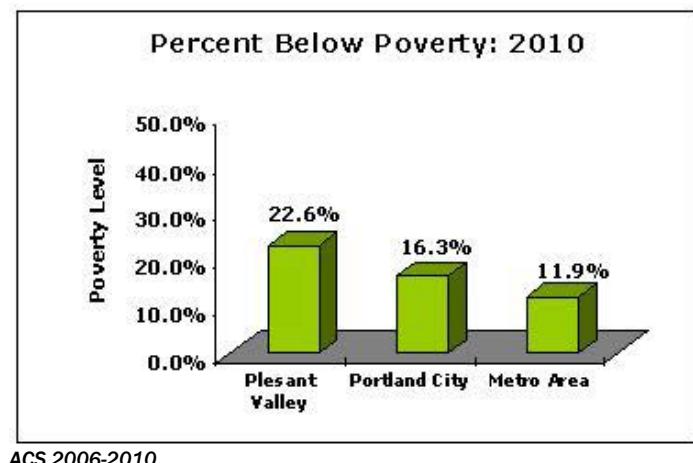
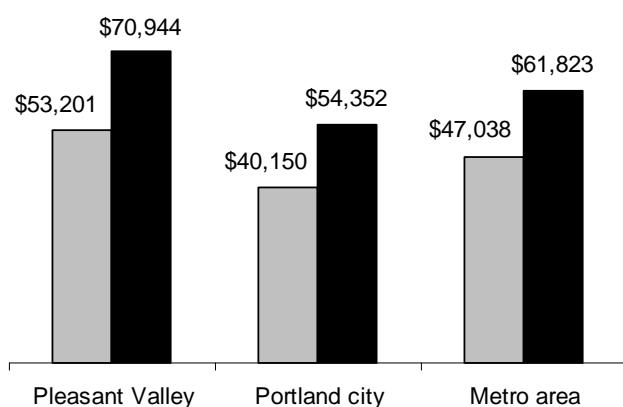
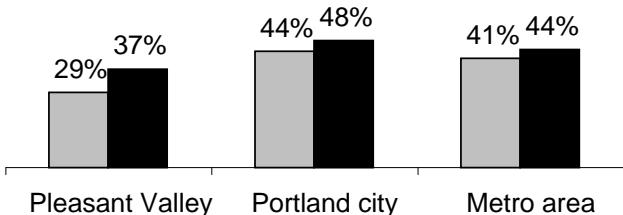
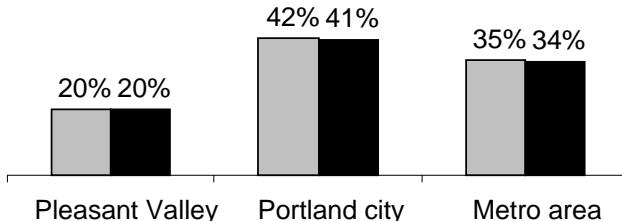
### Diversity Index

(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



### Racial and Ethnic Distribution in Portland vs. Pleasant Valley



**Median Household Income****Percent College Graduates****Percent Renters of Occupied Housing Units****Median Home Value**

	Pleasant Valley	Portland city	Metro area
2010	\$303,102	\$253,184	\$273,500
2000	\$177,778	\$154,721	\$168,347
% change	70.5%	63.6%	62.5%

# Pleasant Valley Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

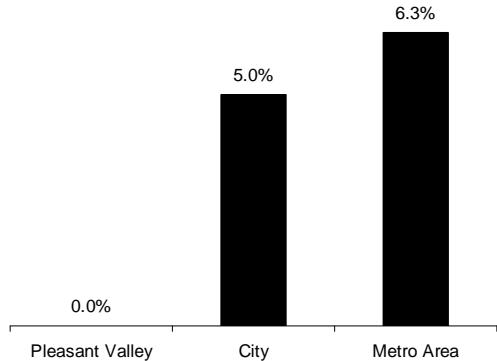
Pleasant Vly	City	Metro Area
28,124	51,937,895	107,875,146

### OFFICE SPACE

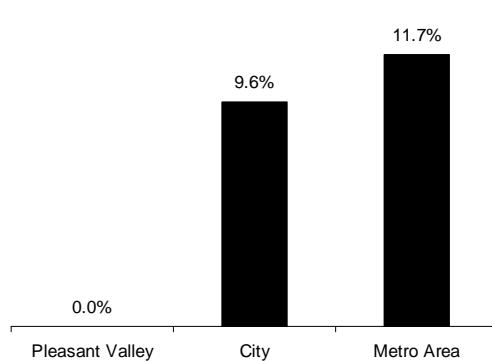
#### Square Feet

Pleasant Vly	City	Metro Area
26,509	54,348,765	92,465,455

#### Retail Vacancy



#### Office Vacancy



#### Retail Rents



#### Office Rents



# Pleasant Valley Analysis Area

## Retail Market Profile

**Retail Gap = \$91 million**

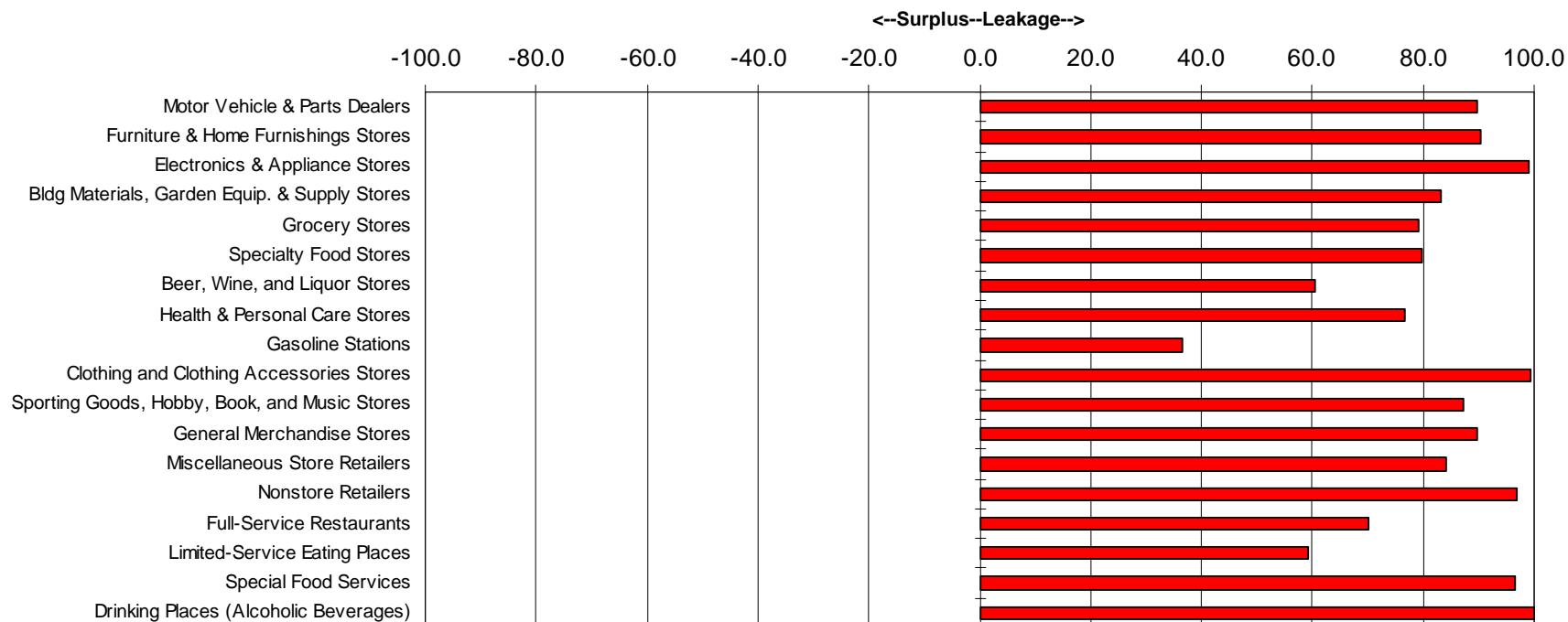
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$104,047,654	\$13,479,171	\$90,568,483	77.1	21
Total Retail Trade (NAICS 44-45)	\$88,876,363	\$10,831,554	\$78,044,809	78.3	16
Total Food & Drink (NAICS 722)	\$15,171,291	\$2,647,617	\$12,523,674	70.3	5

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Pleasant Valley Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

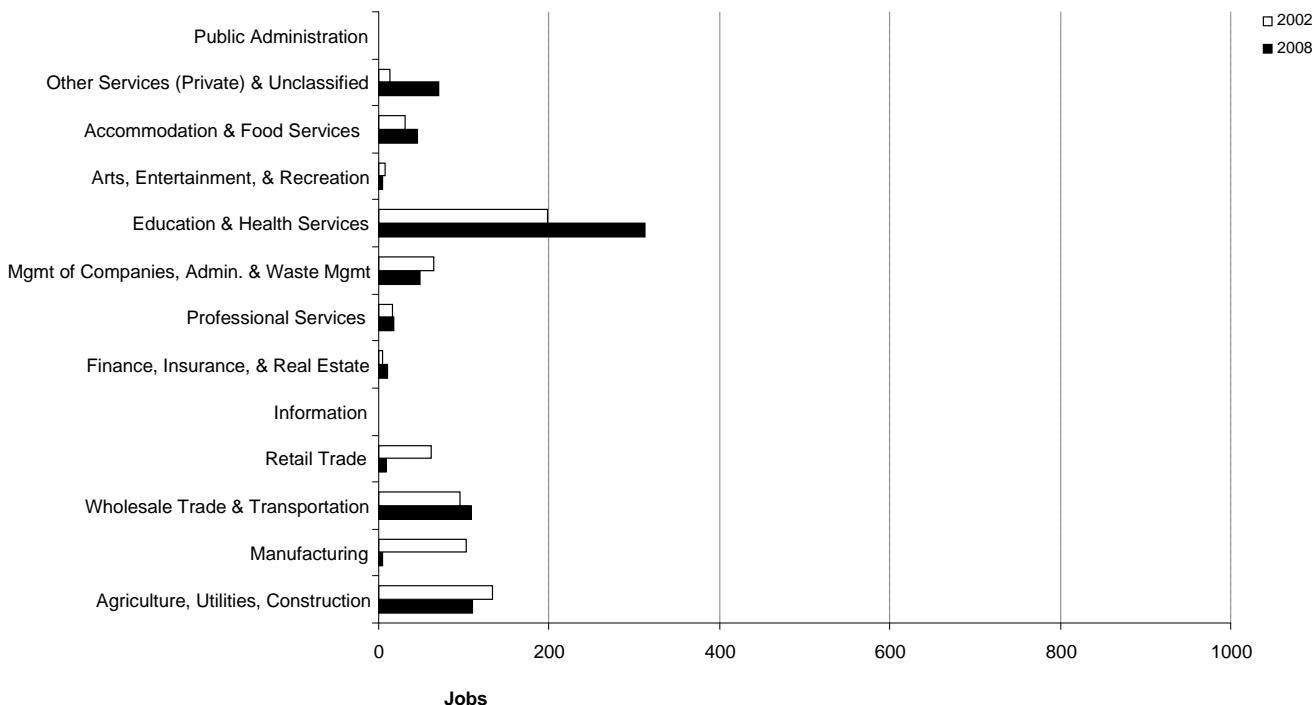
Source: Oregon Employment Department (OED)

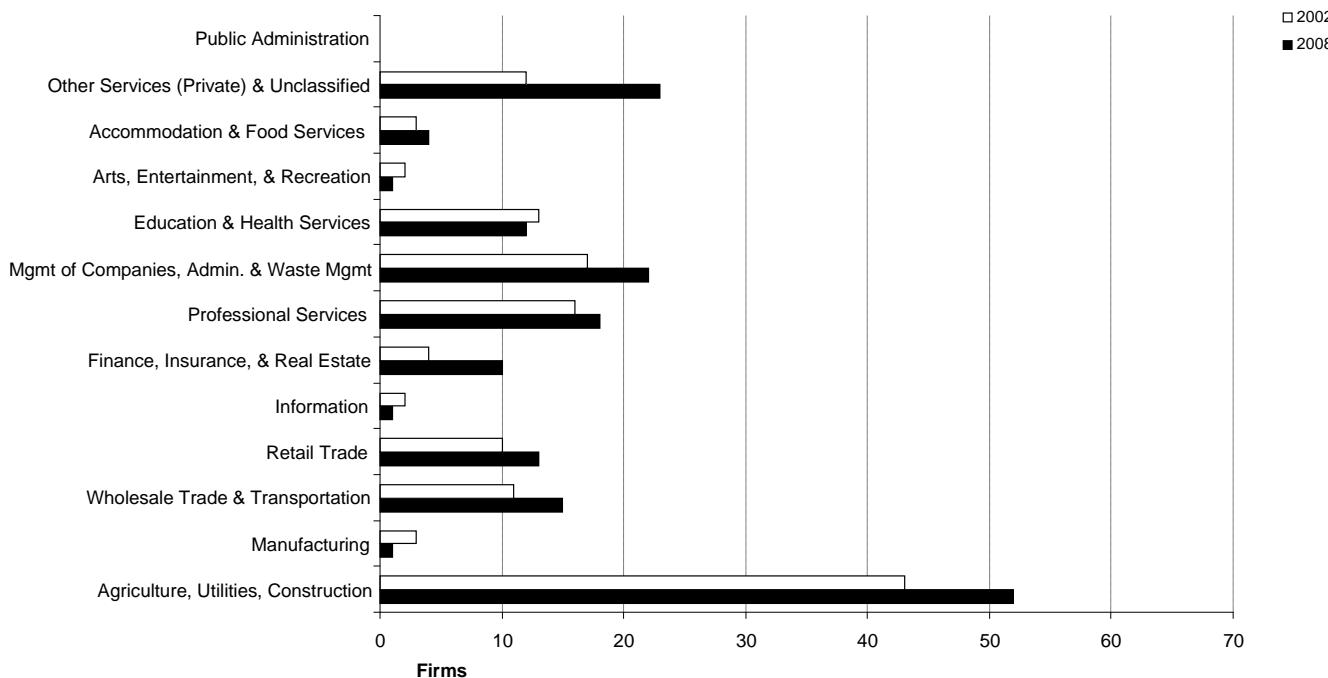
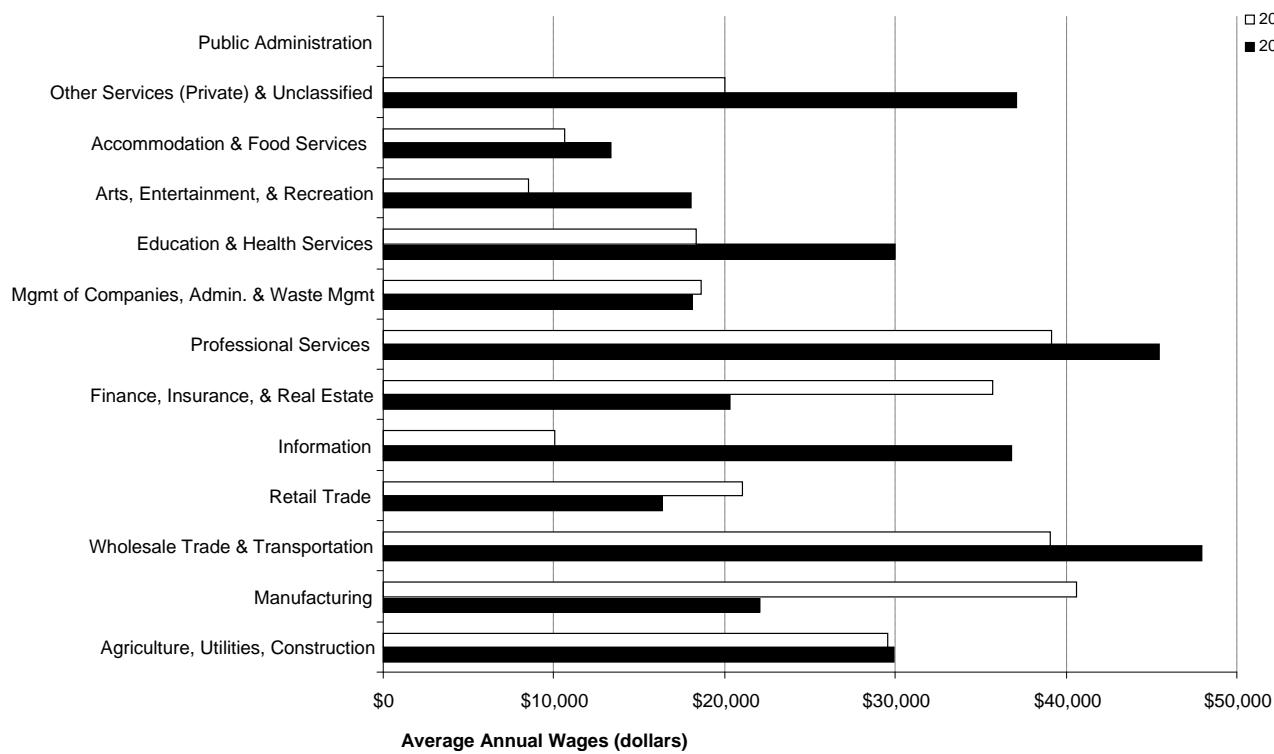
*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	729	744	+15
Total Firms	136	172	+36
Average Annual Wages	\$26,640	\$30,457	+3,817

**Total Jobs**



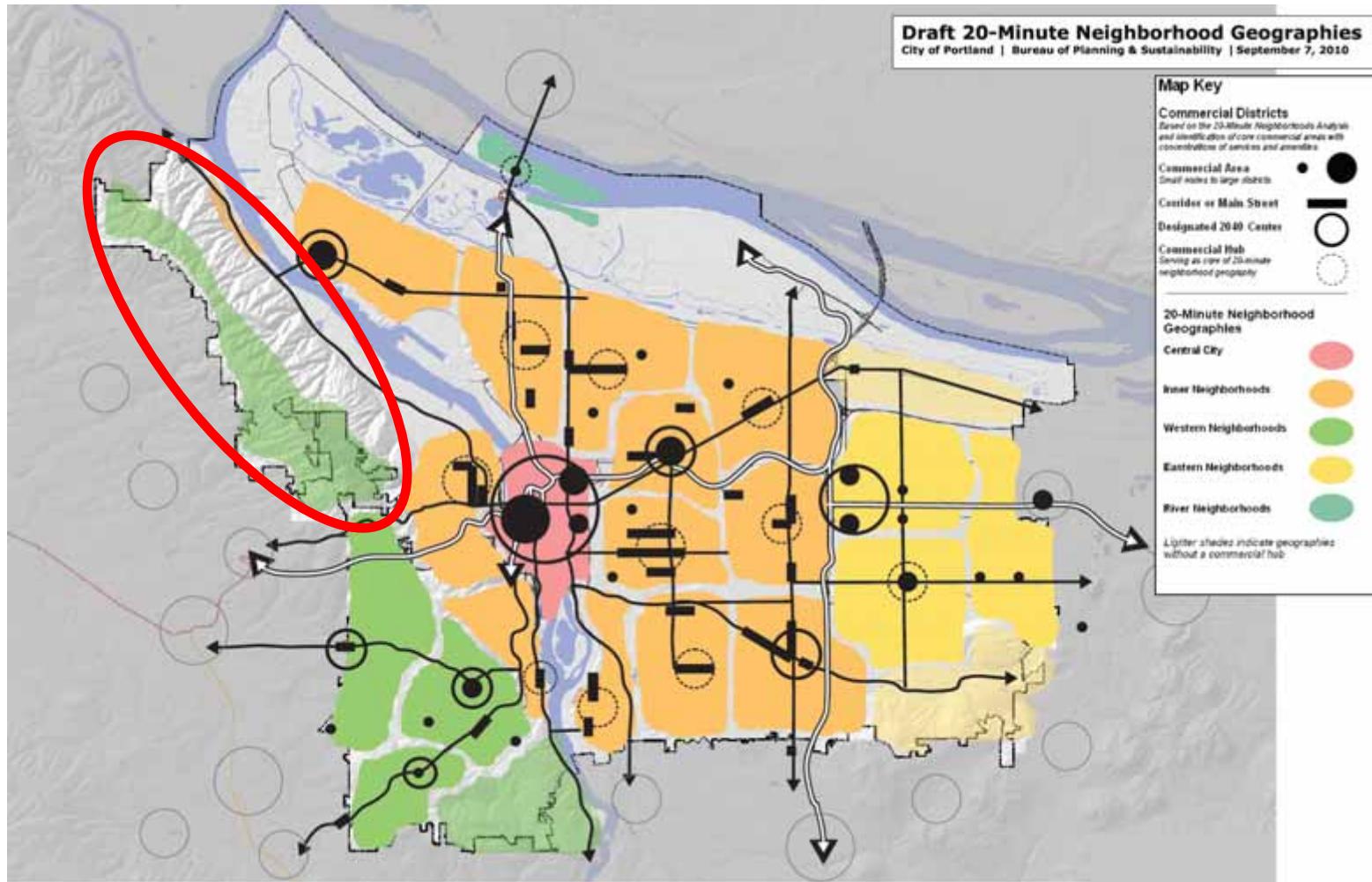
**Total Firms****Average Annual Wages**



## Forest Park-Northwest Hills Analysis Area

Including Forest Park, Northwest Heights, and Linnton neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Forest Park-Northwest Hills Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 8,400 people (3,200 households)  
Land Area: 15.9 sq. miles (500 people per sq. mile)*

The area has no major concentrations of commercial services. There is a small cluster of commercial services in Linnton, along St. Helens Road (Highway 30). Nearby commercial districts include St. Johns (just to the east of the analysis area across the St. Johns Bridge), the Northwest District (at the southeast edge of the analysis area, but separated from populated areas by parkland and the West Hills), and commercial areas in Washington County.

**Grocery stores:** None

**Retail gap:** \$155 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	12%
Within 1/2 mile of a public elementary school:	7%
Within 3 miles of a full-service community center*:	5%
Within 1/2 mile of a full-service grocery store:	0%
Within 1/4 mile of a frequent service transit stop:	0%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** None

**Parks and Open Spaces:** 5,417 acres – including Forest Park, Linnton Park, Forest Heights Park, Macleay Park, and Alder Ridge Natural Area.

**Tree Canopy Coverage:** 81%

**Public Schools:** 1 elementary school (Forest Park Elementary)

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None

**Walkable Access Score:** 7 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Forest Park, Northwest Heights, and Linnton

**Business Associations:** Northwest Industrial Neighborhood Association

## Urban Form Characteristics

Located in the West Hills (Tualatin Mountains), this area is characterized by hilly topography, forested slopes, ravines and streams. Most of the area is not developed at an urban level, with a large portion of the area occupied by Forest Park. The largest developed area is the Forest Heights neighborhood, where curvilinear streets follow the topography. Most streets outside Forest Heights do not have sidewalks. A very small portion of the area, in Linnton, features a street grid.

**Access issues.** Most of the area lacks street connectivity and continuous sidewalks. The area has a relatively small population base and a low density of development. It is served by few commercial or community services and has very limited transit service. Topographical features and infrequent street connections limit access to adjacent areas.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	0
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	2,798	37%	441
Multi-Family Residential:	46	.6%	3
Commercial/Mixed-Use:	5	.1%	2
Employment:	0	0%	0
Industrial:	88	1%	2
Open Space:	4,657	61%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

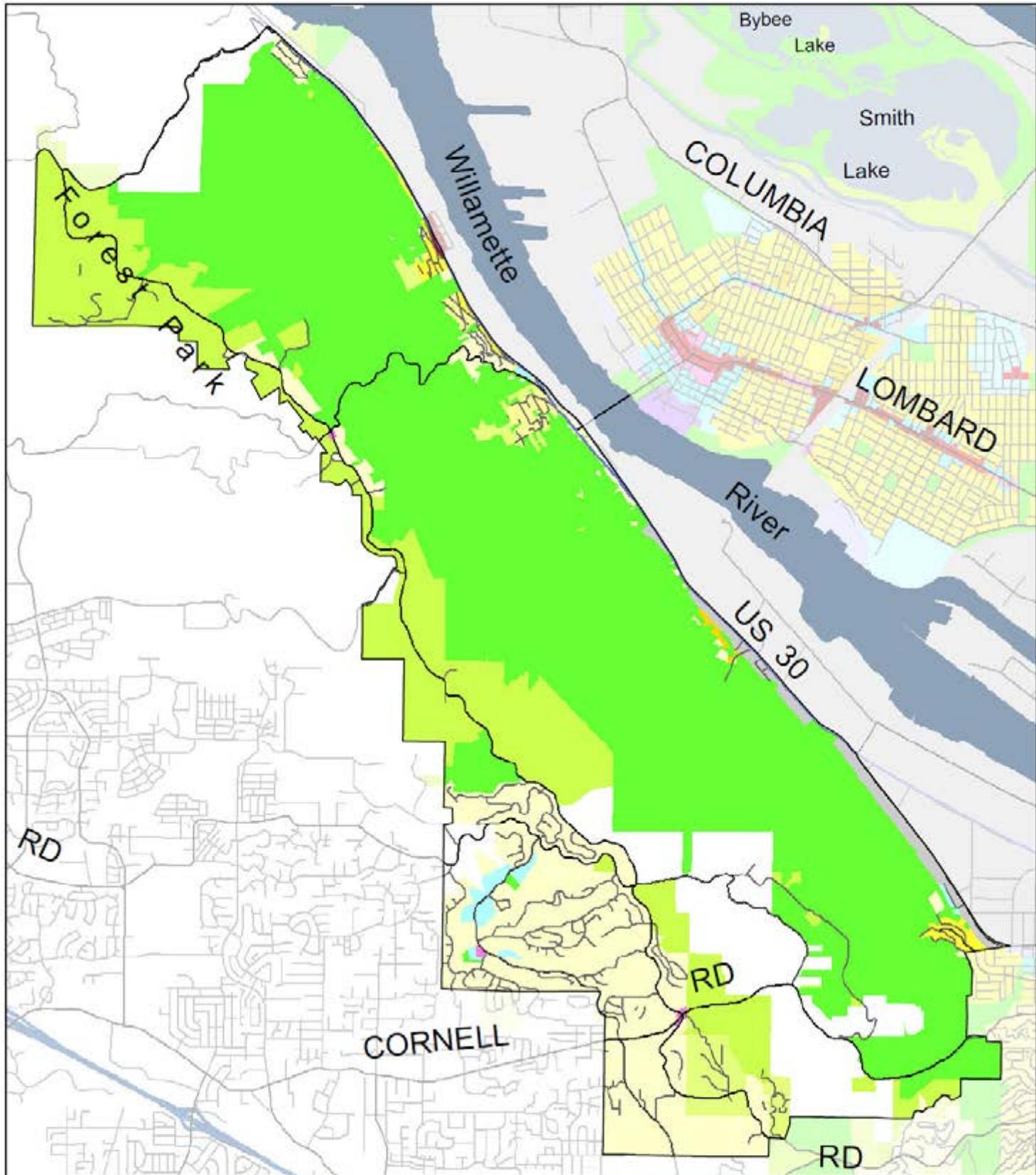
2010 Housing Units (Census):	3,355
2035 Housing Units:	4,400

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Forest Park-Northwest Hills Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



Feet  
0 1,500 3,000 4,500

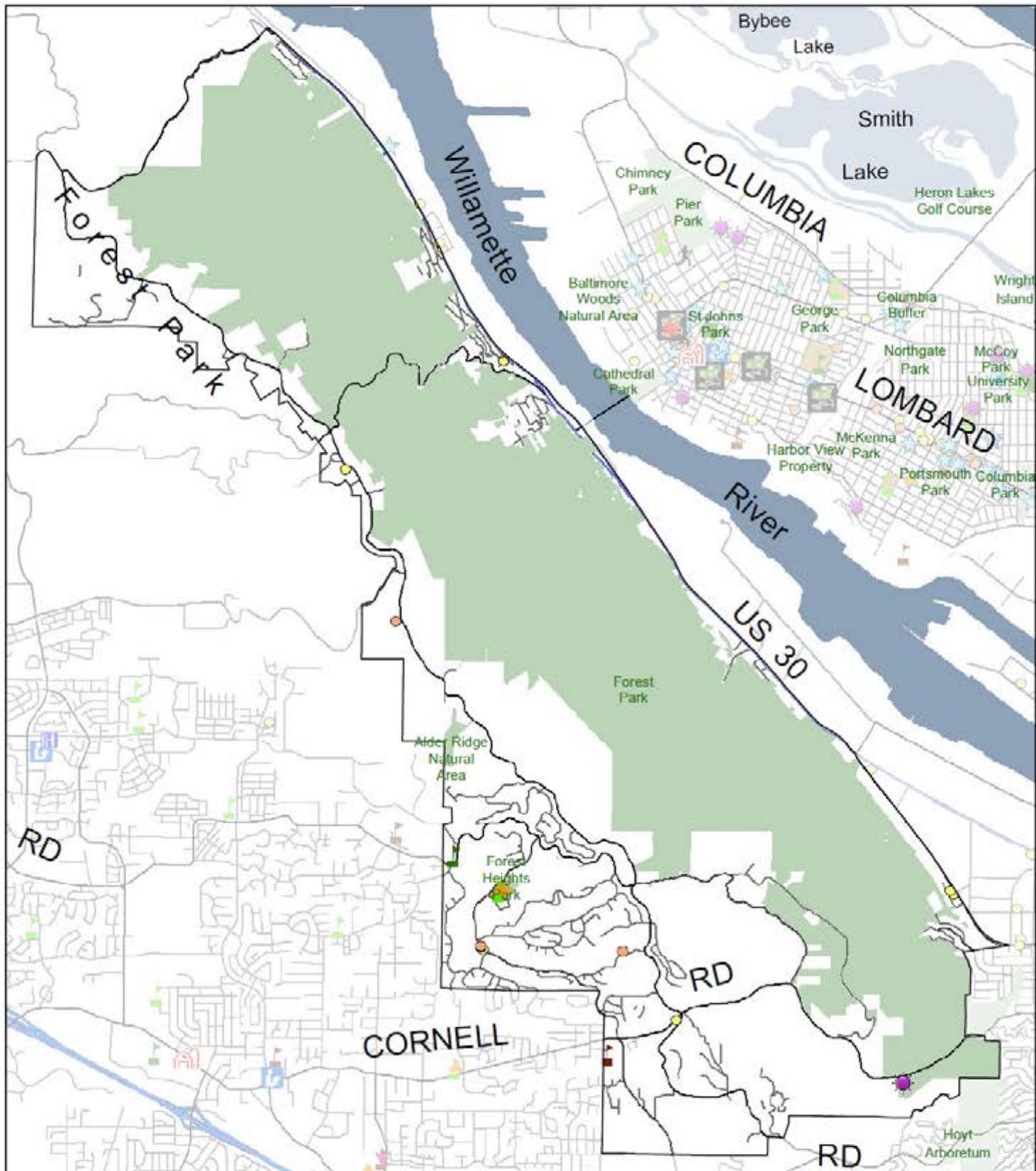


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# Forest Park-Northwest Hills Analysis Area



## Services and Amenities

February 1, 2012  
commercial data: InfoUSA 2008



0 1,500 3,000 4,500 Feet

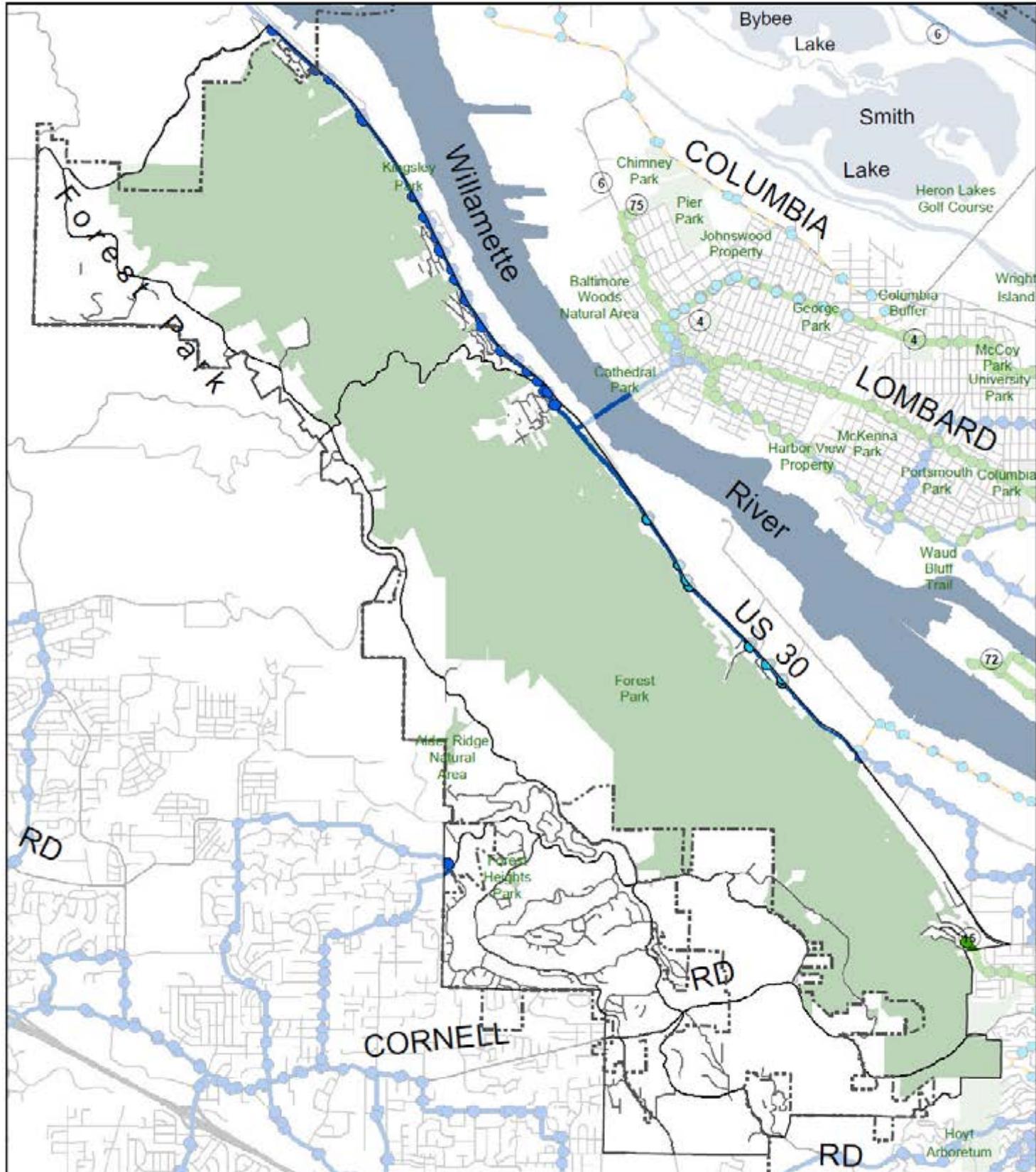


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# Forest Park-Northwest Hills Analysis Area



## Transit Infrastructure

February 1, 2012

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Light Rail Stops		Bus Stops	
MAX		Frequent Stops	
Street Car		Standard Stops	
MAX		Rush Hour Stops	
Streetcar			

MAX		Frequent Service	
MAX		Standard Service	
Street Car		Rush Hour Only Service	
MAX			
Streetcar			

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Street Car		
MAX		
Streetcar		



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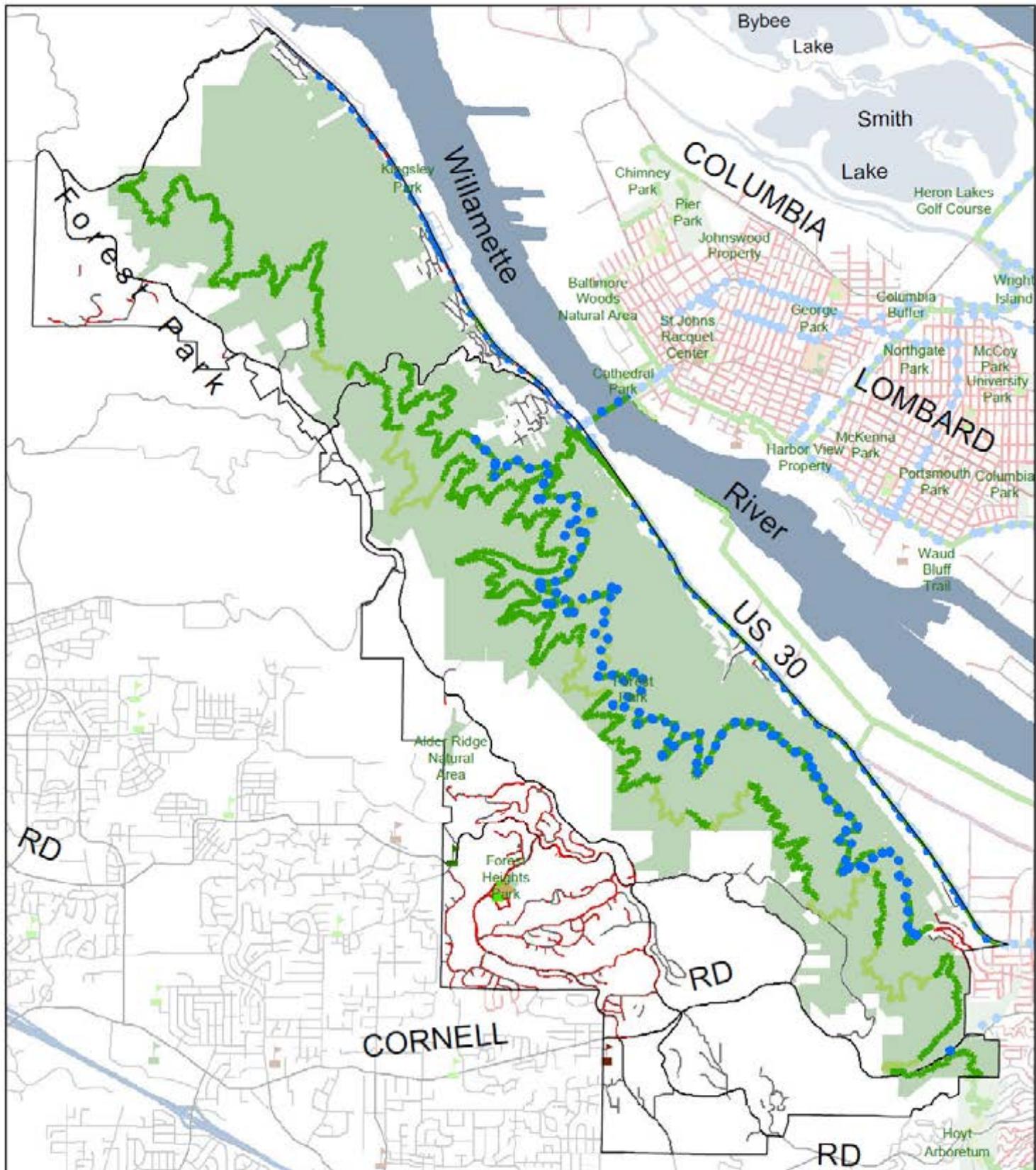


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# Forest Park-Northwest Hills Analysis Area



## Sidewalks and Bicycle Infrastructure

- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

February 1, 2012

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- Public HS
- Public K-8
- Private Schools



0 1,500 3,000 4,500 Feet

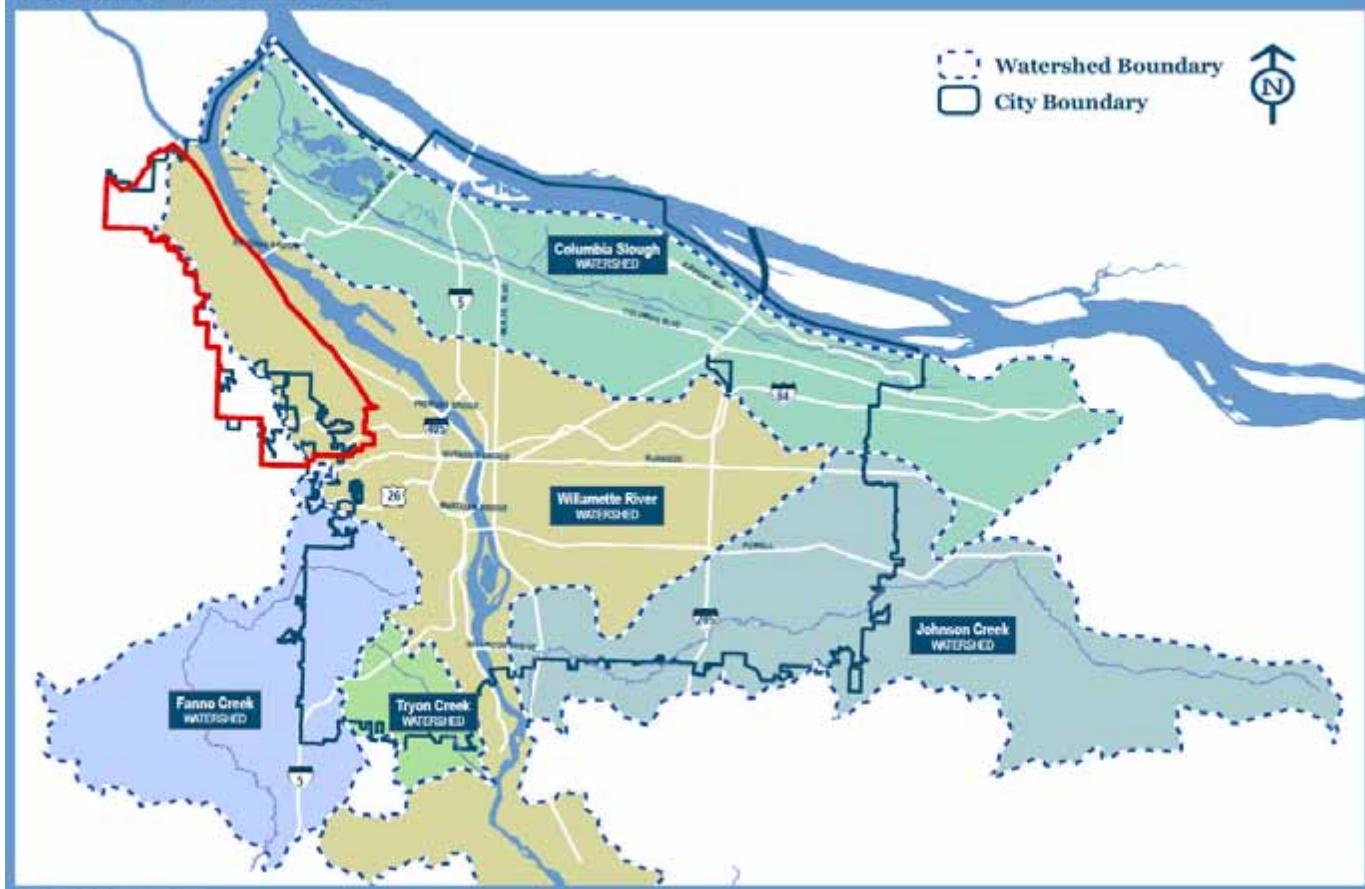


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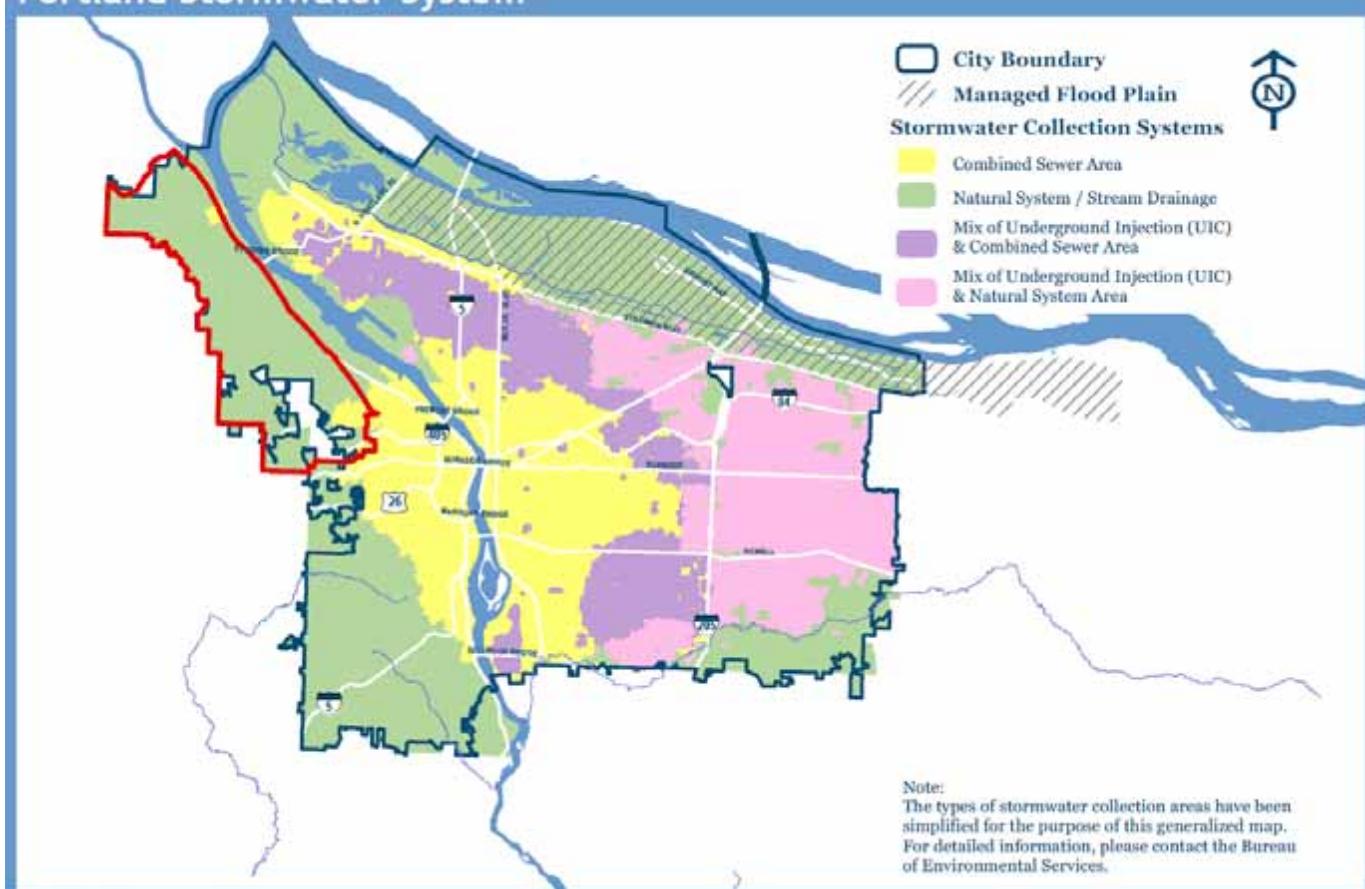


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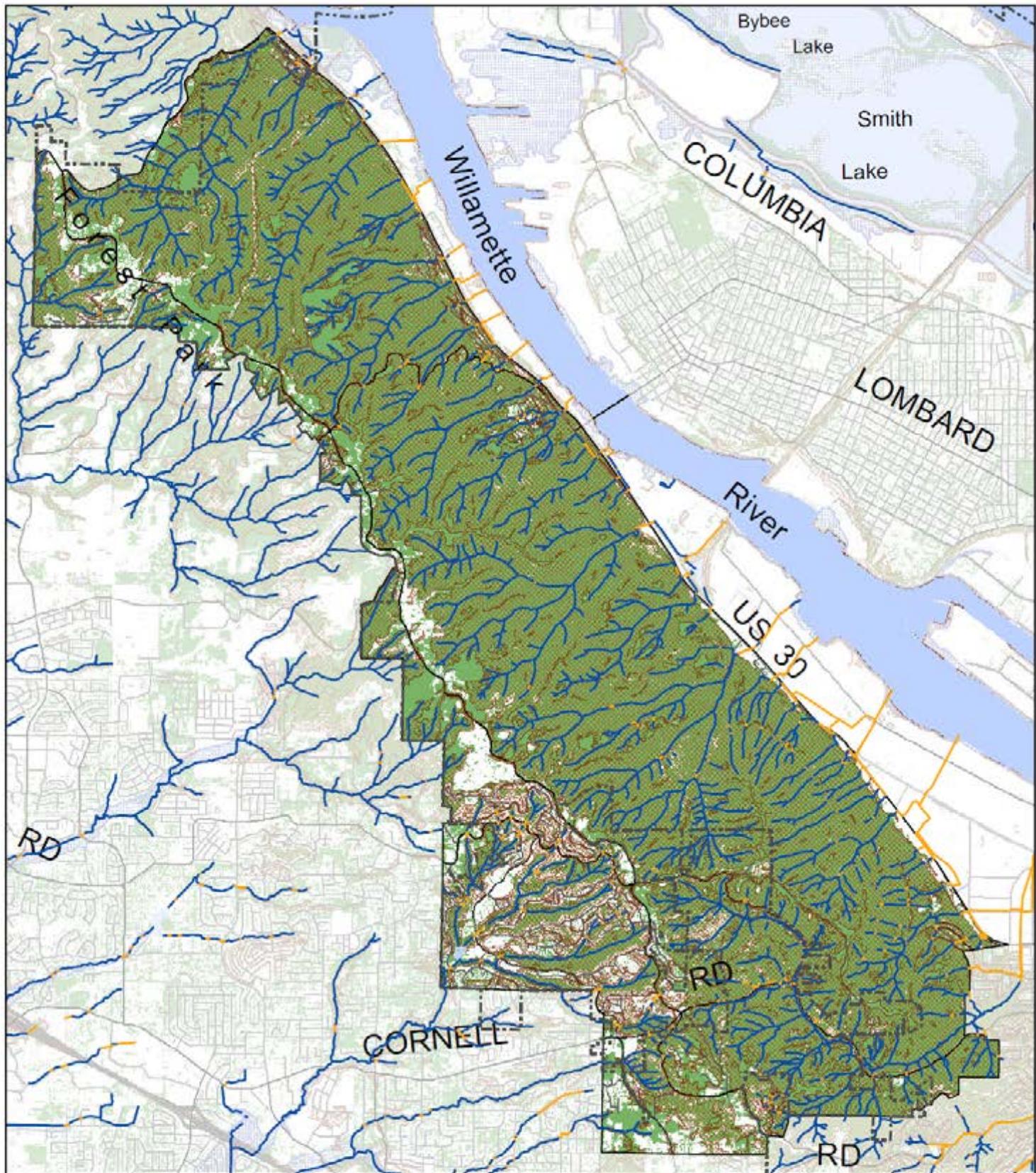
## Portland Watersheds



## Portland Stormwater System



# Forest Park-Northwest Hills Analysis Area



## Watersheds and Natural Features

February 1, 2012

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,500 3,000 4,500  
Feet



# Forest Park-Northwest Hills Analysis Area

## Demographics (2000 – 2010)

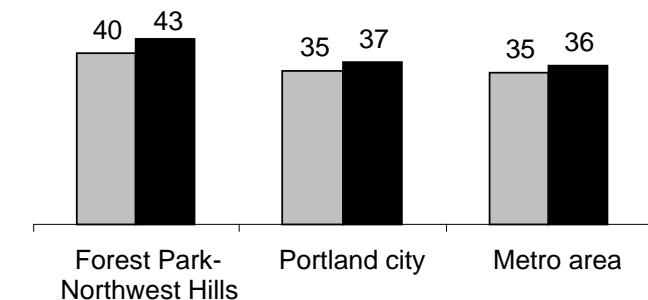
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

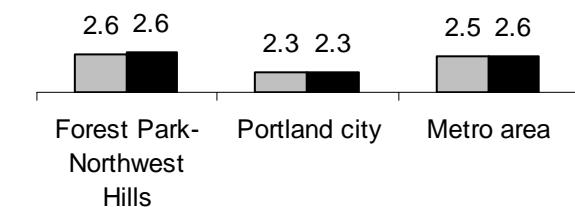
	Forest Park-Northwest Hills	Portland city	Metro area
2010	8,379	583,776	2,226,009
2000	5,279	529,121	1,927,881
% change	59%	10%	15%

■ 2000 ■ 2010

### Median Age

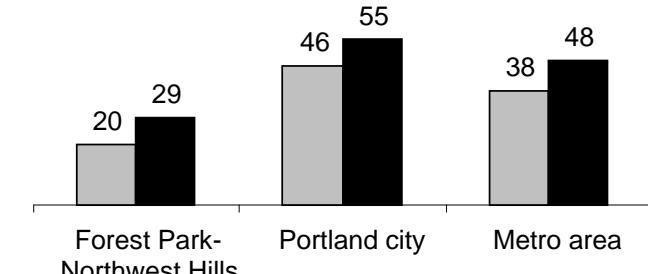


### Average Household Size

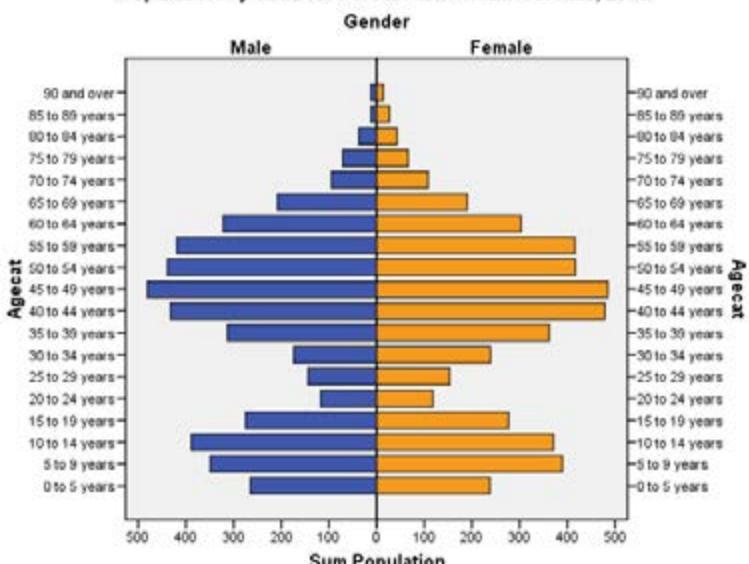


### Diversity Index

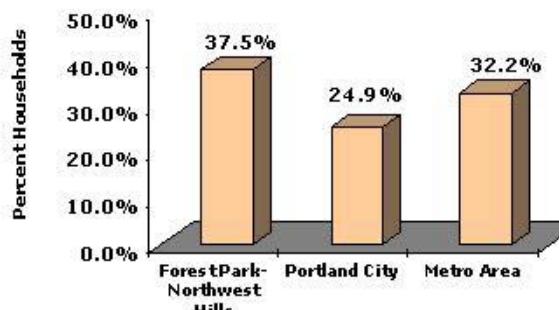
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



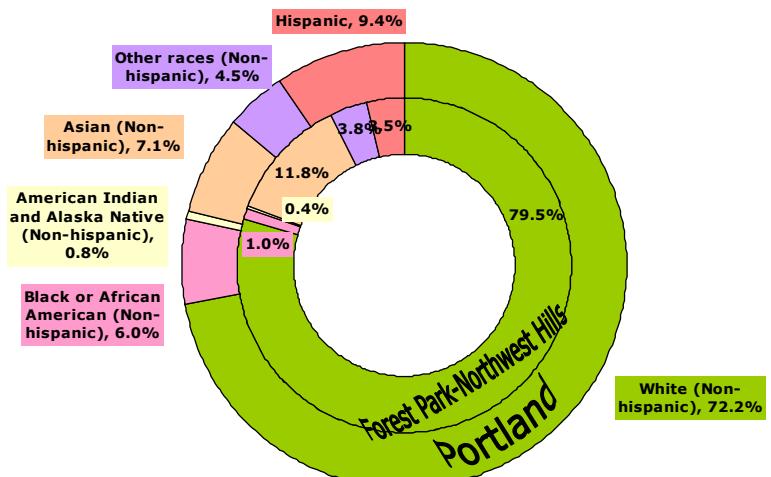
Population Pyramid for Forest Park-Northwest Hills, 2010

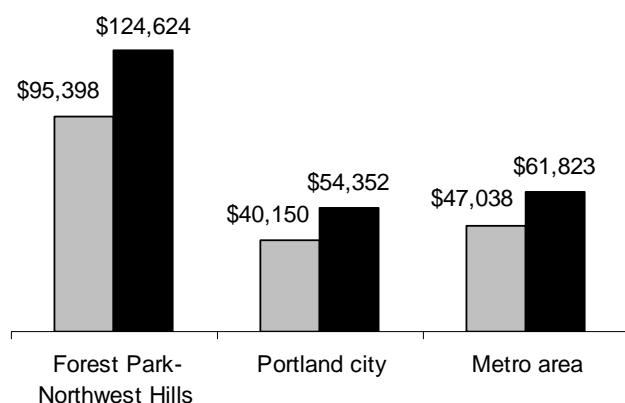
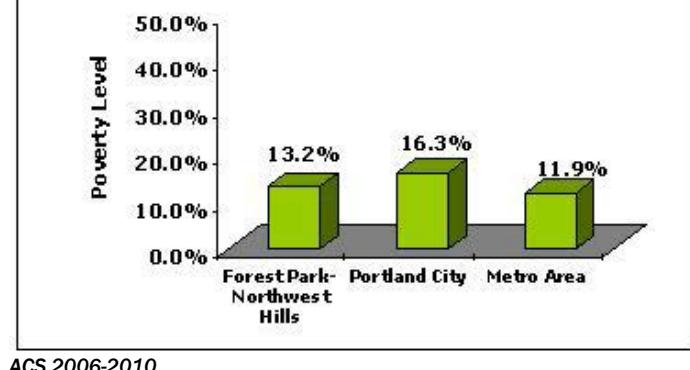
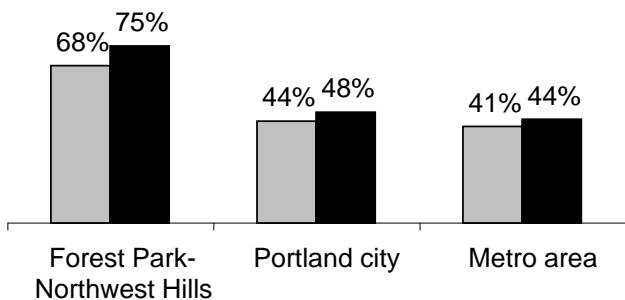
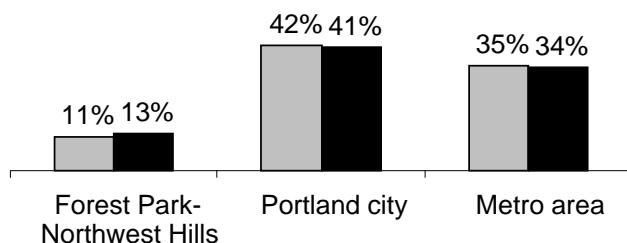


Households with Children Under 18 Years: 2010



Racial and Ethnic Distribution in Portland vs. Forest Park-Northwest Hills



**Median Household Income****Percent Below Poverty: 2010****Percent College Graduates****Percent Renters of Occupied Housing Units****Median Home Value**

	Forest Park-Northwest Hills	Portland city	Metro area
2010	\$655,858	\$253,184	\$273,500
2000	\$390,149	\$154,721	\$168,347
% change	68.1%	63.6%	62.5%

# Forest Park-Northwest Hills Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

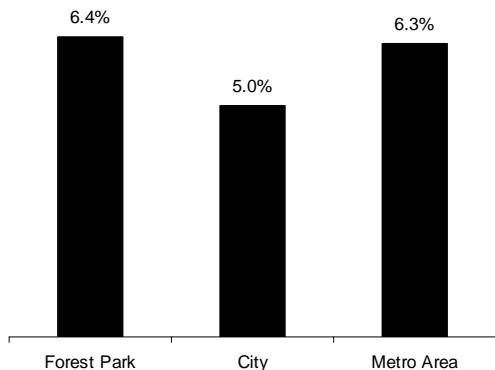
Forest Park	City	Metro Area
35,154	51,937,895	107,875,146

### OFFICE SPACE

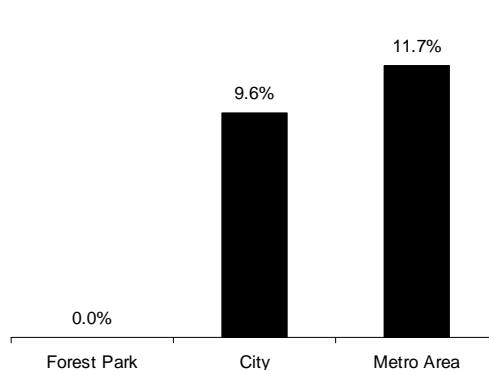
#### Square Feet

Forest Park	City	Metro Area
74,818	54,348,765	92,465,455

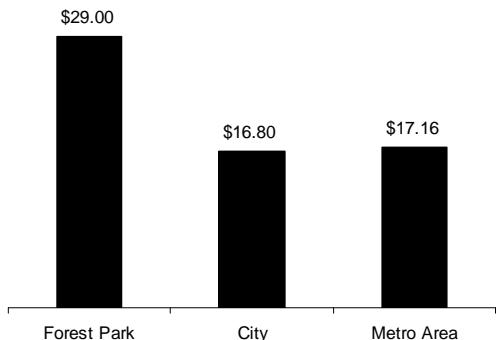
#### Retail Vacancy



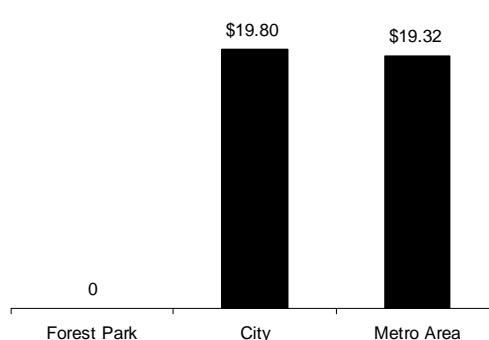
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Forest Park-Northwest Hills Analysis Area

## Retail Market Profile

**Retail Gap = \$155 million**

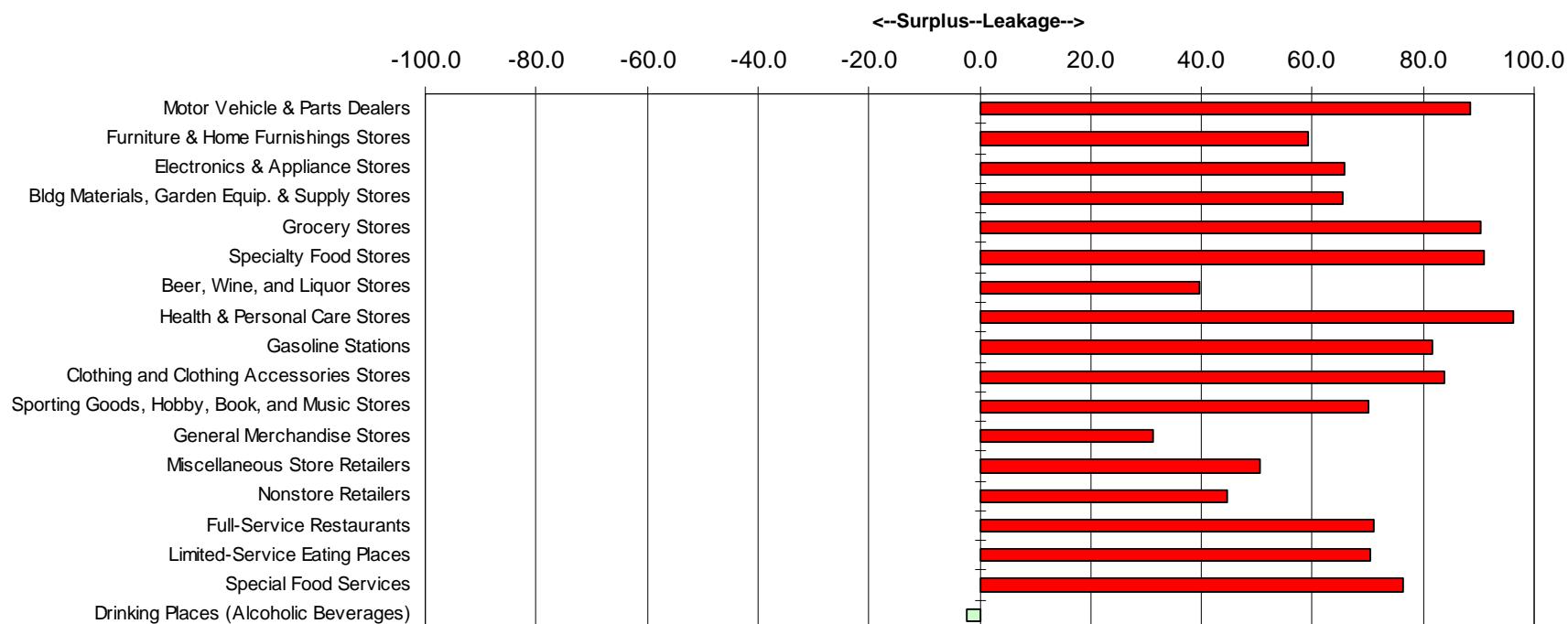
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$190,106,383	\$34,802,980	\$155,303,403	69.1	37
Total Retail Trade (NAICS 44-45)	\$162,481,865	\$27,567,805	\$134,914,060	71.0	28
Total Food & Drink (NAICS 722)	\$27,624,518	\$7,235,175	\$20,389,343	58.5	9

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Forest Park-Northwest Hills Analysis Area

## Employment

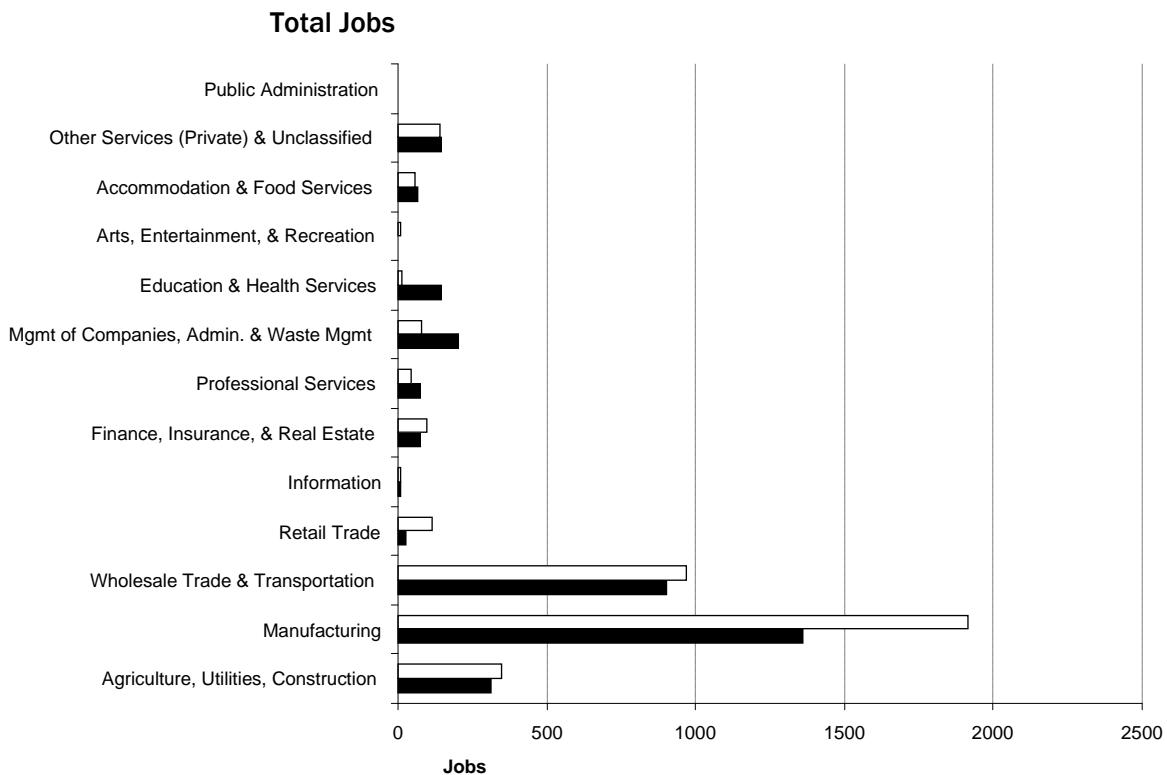
Quarterly Census of Employment and Wages data for 2002 & 2008

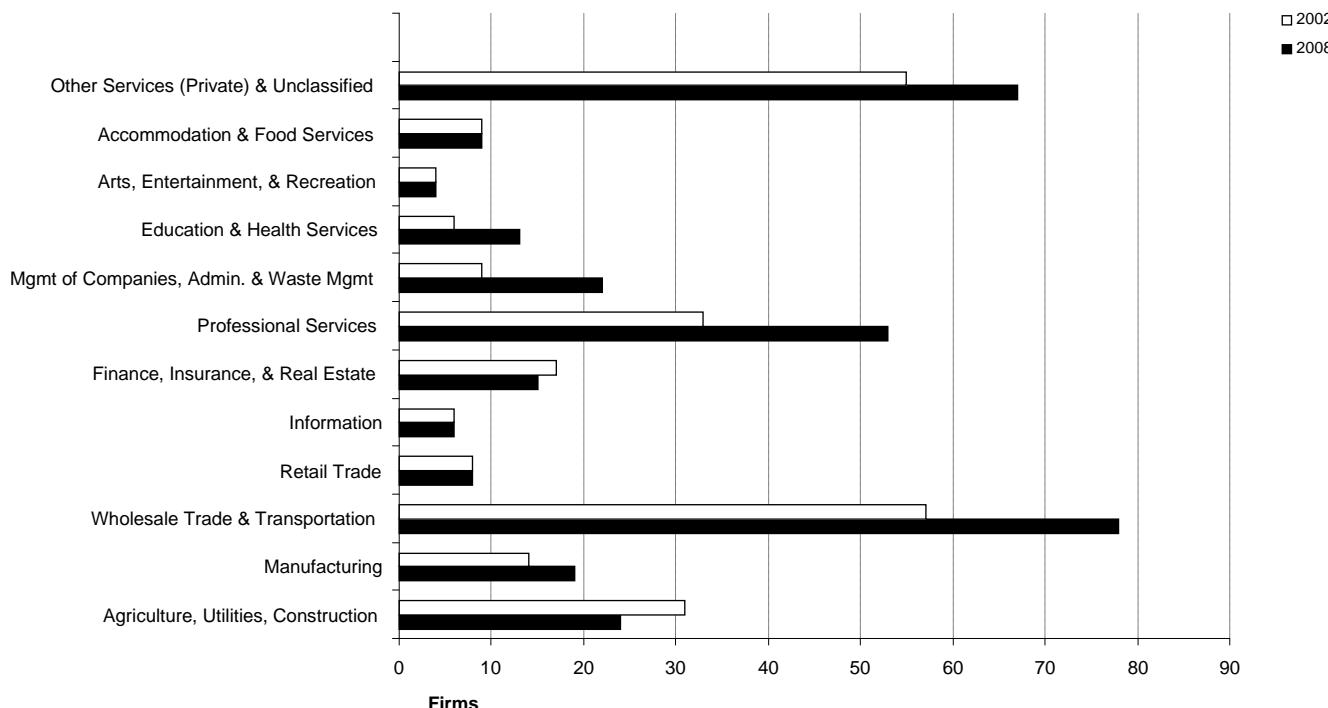
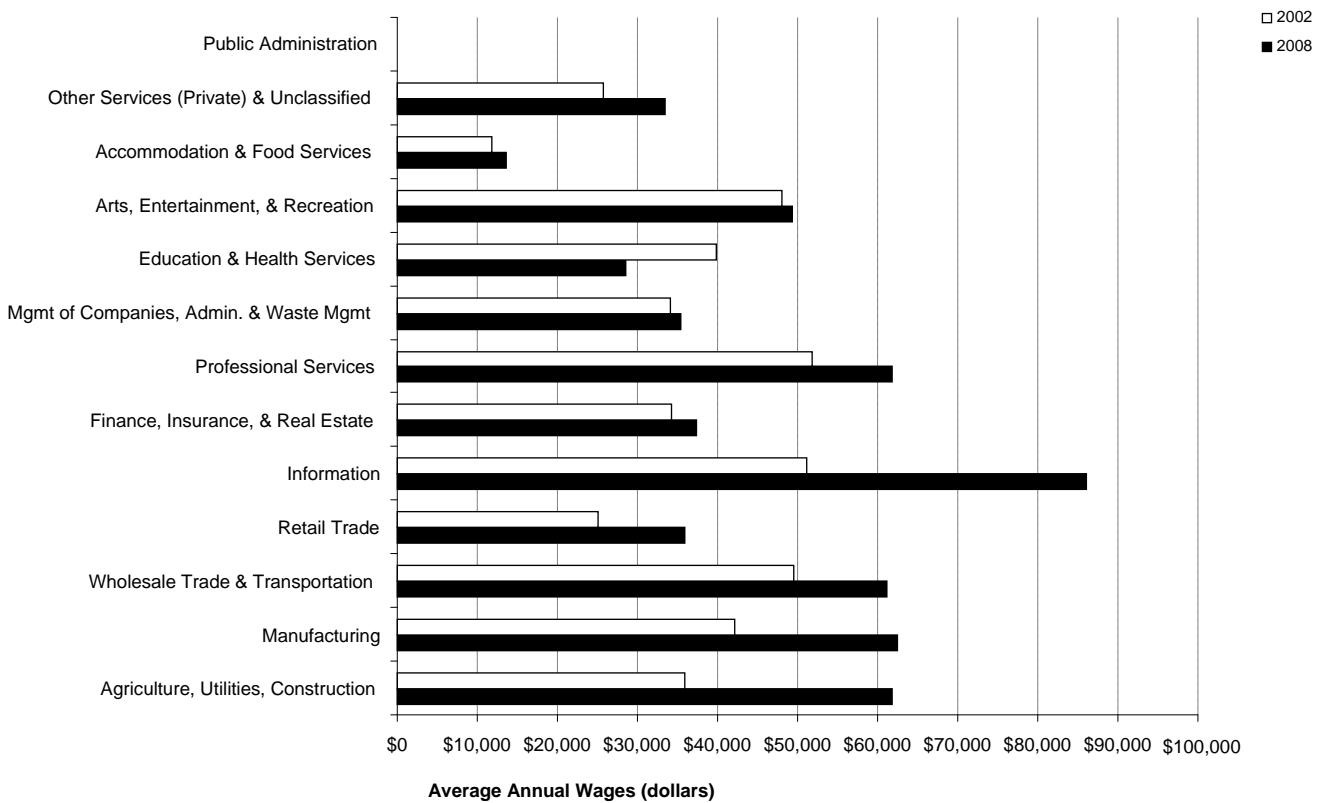
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	3,800	3,329	- 471
Total Firms	249	318	+69
Average Annual Wages	\$41,581	\$56,133	+14,552



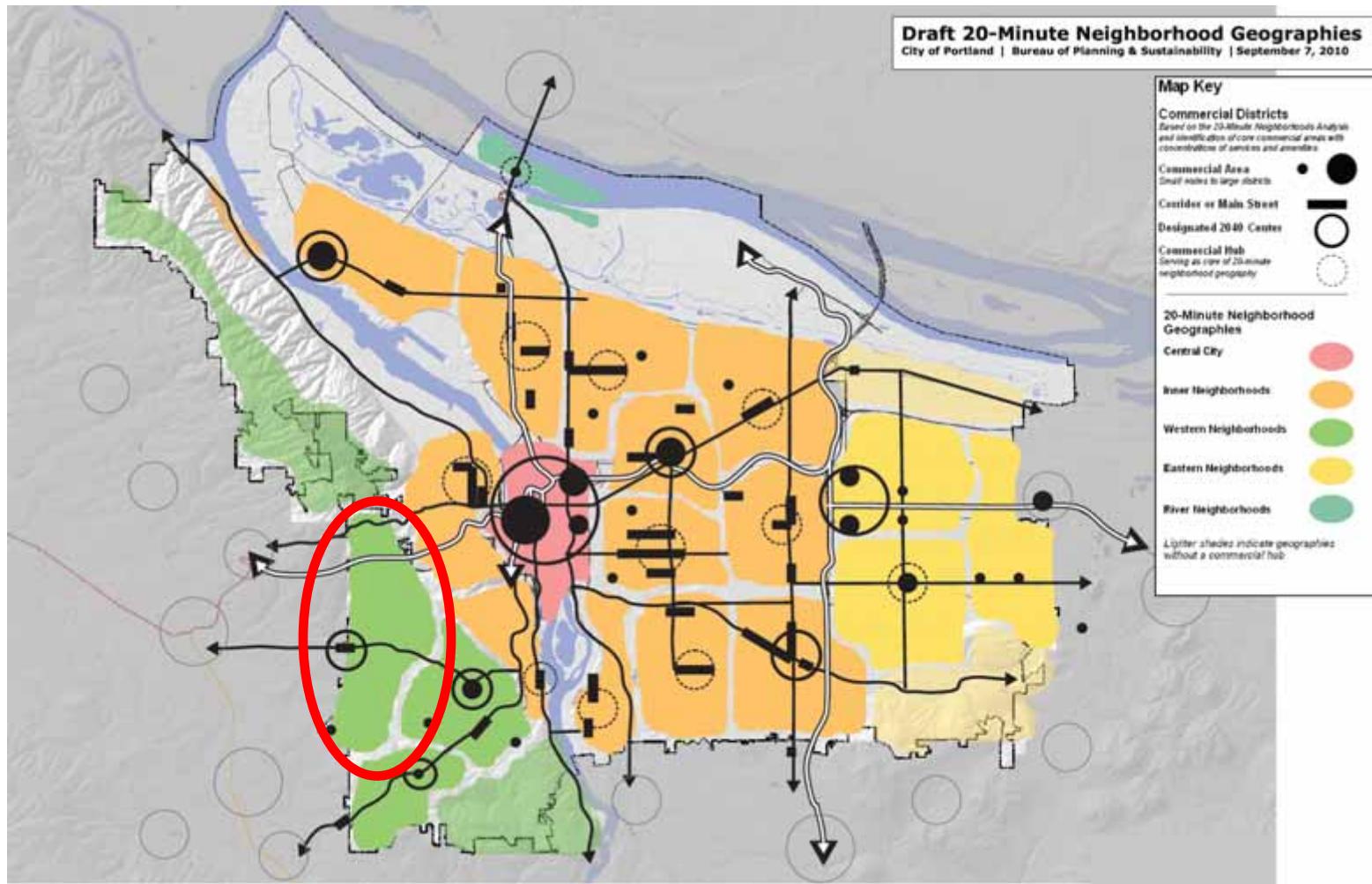
**Total Firms****Average Annual Wages**



## Raleigh Hills Analysis Area

*Including Sylvan-Highlands, Bridlemile, Hayhurst, Maplewood, and parts of the Southwest Hills Residential League and Ashcreek neighborhoods*

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

*Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.*

# Raleigh Hills Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 16,300 people (7,000 households)  
Land Area: 5.2 sq. miles (3,000 people per sq. mile)*

The area's largest concentration of commercial services is the Raleigh Hills shopping area along Beaverton-Hillsdale Highway (mostly located outside Portland in Washington County). Secondary commercial areas are located on Beaverton-Hillsdale Highway at Shattuck Road, at the intersection of Garden Home Road and Oleson Road (at the analysis area's southwest boundary), and at Skyline Boulevard and Highway 26.

**Grocery stores:** 3 (1 store per 2,333 households)

**Retail gap:** \$221 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*) – Note that this figure does not take into account spending in the Raleigh Hills commercial area outside Portland.

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	56%
Within 1/2 mile of a public elementary school:	12%
Within 3 miles of a full-service community center*:	88%
Within 1/2 mile of a full-service grocery store:	18%
Within 1/4 mile of a frequent service transit stop:	7%

\*Parks Bureau service standard

**Community Centers:** None (Southwest Community Center located just outside southeast edge of analysis area)

**Libraries:** None (Garden Home Community Library located just outside southwest edge of analysis area in Washington County)

**Parks and Open Spaces:** 120 acres – including Hamilton, Albert Kelly, Pendleton and April Hill parks, and the Fanno Creek Natural Area.

**Tree Canopy Coverage:** 52%

**Public Schools:** 3 elementary schools (Bridlemile, Hayhurst and Maplewood\* elementary schools)  
\*At edge of analysis area

**Colleges (campus):** None

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None

**Walkable Access Score:** 22 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Sylvan-Highlands, Bridlemile, Hayhurst, Maplewood, and parts of the Southwest Hills Residential League and Ashcreek

**Business Associations:** None

## Urban Form Characteristics

Natural features are prominent characteristics of this area, including Fanno Creek and smaller streams, ravines, forested slopes and gently-rolling hills. The area is composed primarily of residential neighborhoods, which include a mix of rectilinear blocks and curvilinear streets that follow the area's hilly topography. Most streets do not have sidewalks. The area includes a small number of commercial areas, mostly auto-oriented and located along major roads.

**Access issues.** Most of the area lacks frequent street connectivity and most streets do not have sidewalks. Off-street trails provide additional pedestrian connections in some locations. The area's limited number of commercial areas are beyond walking distance for most residents, and there are few options for accessing these areas other than major roads that lack continuous pedestrian facilities. The area has relatively low population densities and has limited transit service. Topography and other natural features also limit pedestrian and bicycle accessibility in the area.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	1 (Raleigh Hills Town Center – small portion in Portland, no adopted boundaries)
Main Streets:	.2 mile (Garden Home Road – at Oleson)
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	2,458	88%	614
Multi-Family Residential:	109	4 %	27
Commercial/Mixed-Use:	65	2%	38
Employment:	0	0%	0
Industrial:	0	0%	0
Open Space:	160	6%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

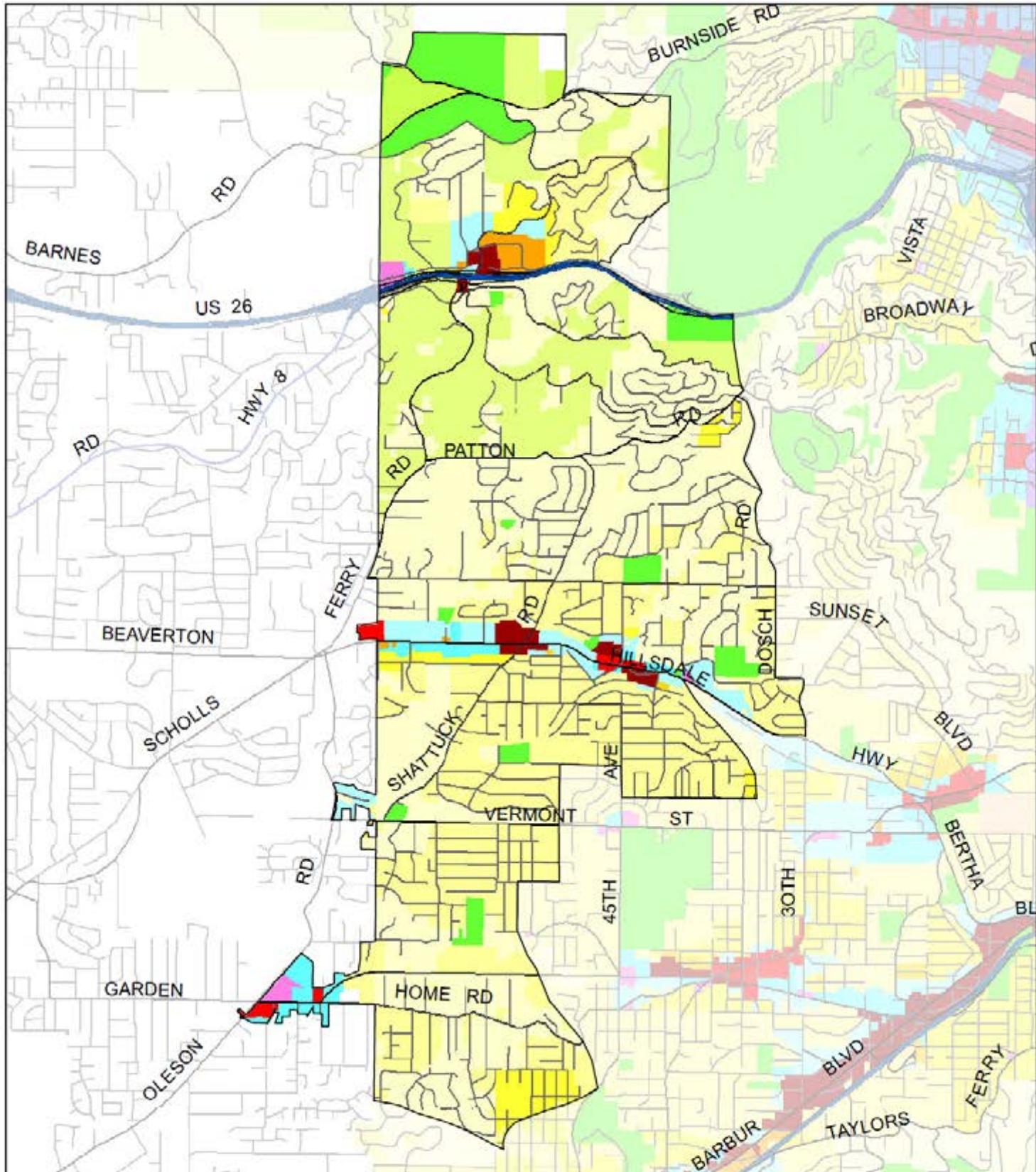
2010 Housing Units (Census):	7,747
2035 Housing Units:	10,700

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Raleigh Hills Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



Feet  
0 1,000 2,000 3,000

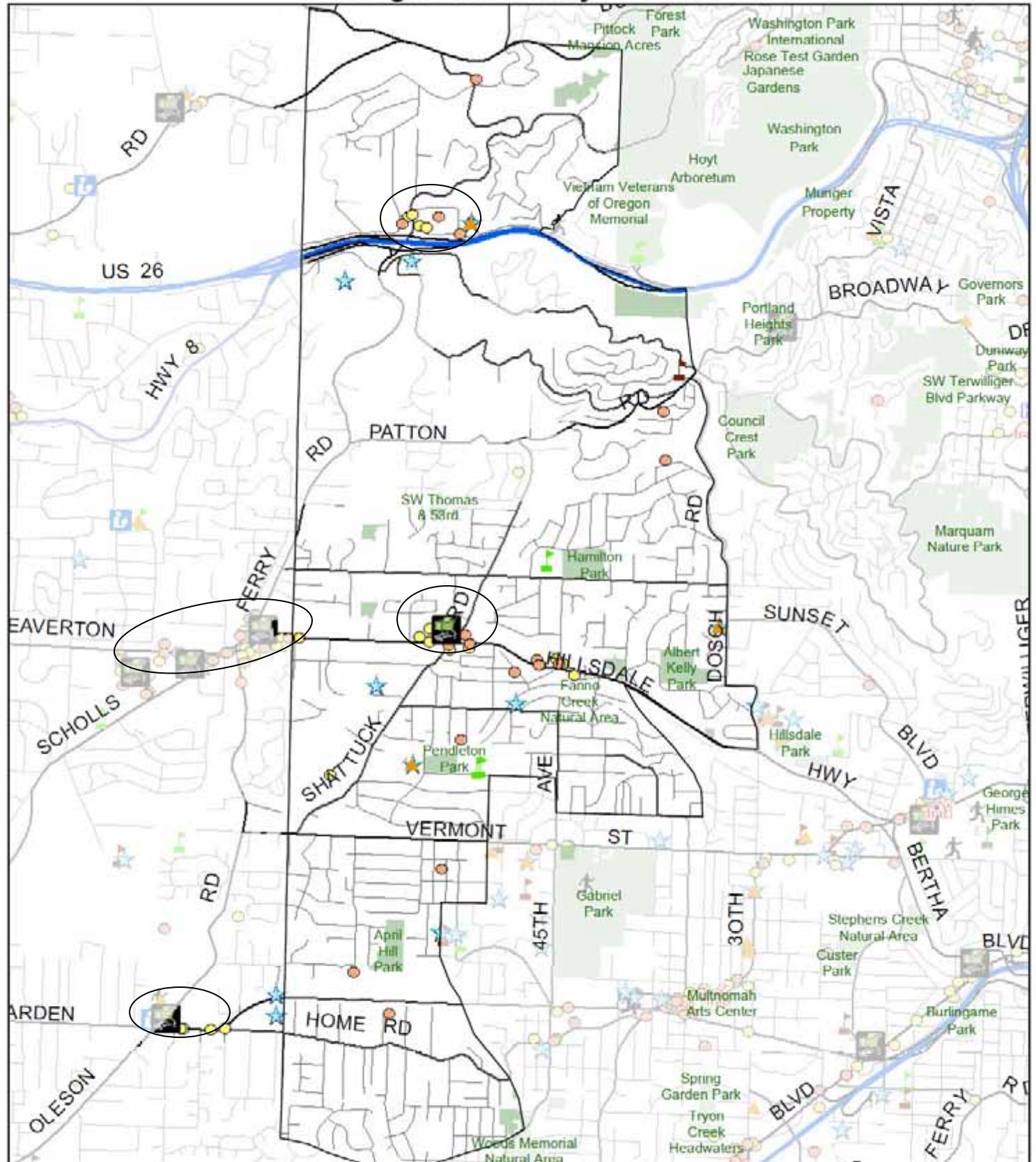


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City of Portland, Oregon  
Tom Adams, Mayor - Susan Anderson, Director

# Raleigh Hills Analysis Area



## Services and Amenities

- |                   |                   |                 |
|-------------------|-------------------|-----------------|
| Type 1 Commercial | Places of Worship | Public HS       |
| Type 2 Commercial | Farmers Markets   | Public K-12     |
| Fitness Centers   | Libraries         | Private Schools |
| Grocery Stores    | Community Centers | Daycare Centers |
- City of Portland Bureau of Planning & Sustainability  
Sam Adams, Mayor | Stas Anderson, Director

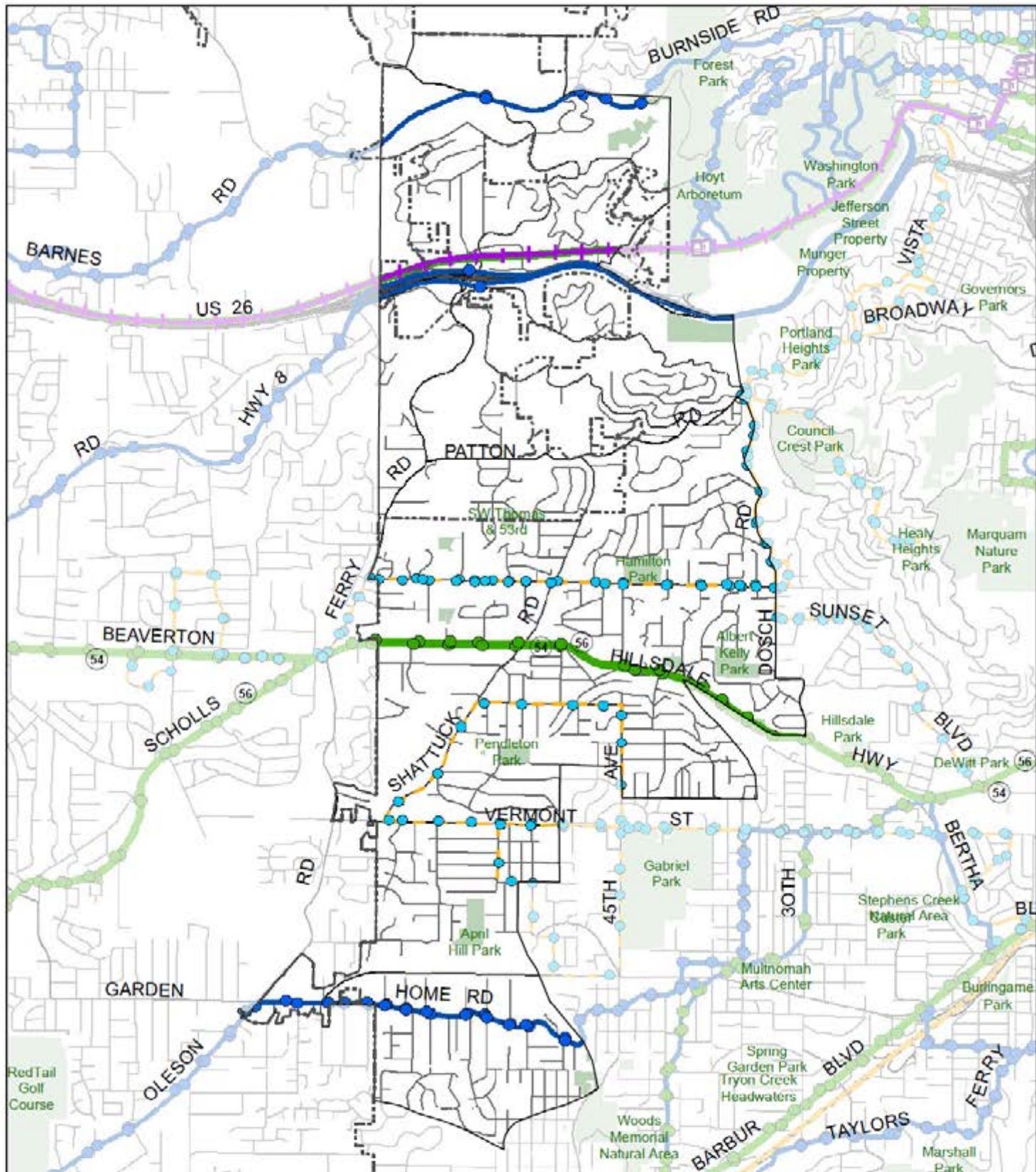
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commercial data from InfoUSA 2008

0 750 1,500 3,000  
Feet

March 25, 2011

# Raleigh Hills Analysis Area



## Transit Infrastructure

February 1, 2012

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- |                         |                  |
|-------------------------|------------------|
| <b>Light Rail Stops</b> | <b>Bus Stops</b> |
| MAX                     | Frequent Stops   |
| Street Car              | Standard Stops   |
| MAX                     | Rush Hour Stops  |
| Streetcar               |                  |
- 
- |                  |                               |
|------------------|-------------------------------|
| <b>MAX</b>       | <b>Standard Service</b>       |
| <b>Streetcar</b> | <b>Frequent Service</b>       |
| <b>MAX</b>       | <b>Rush Hour Only Service</b> |
| <b>Streetcar</b> | <b>City Boundary</b>          |



0 1,000 2,000 3,000  
Feet

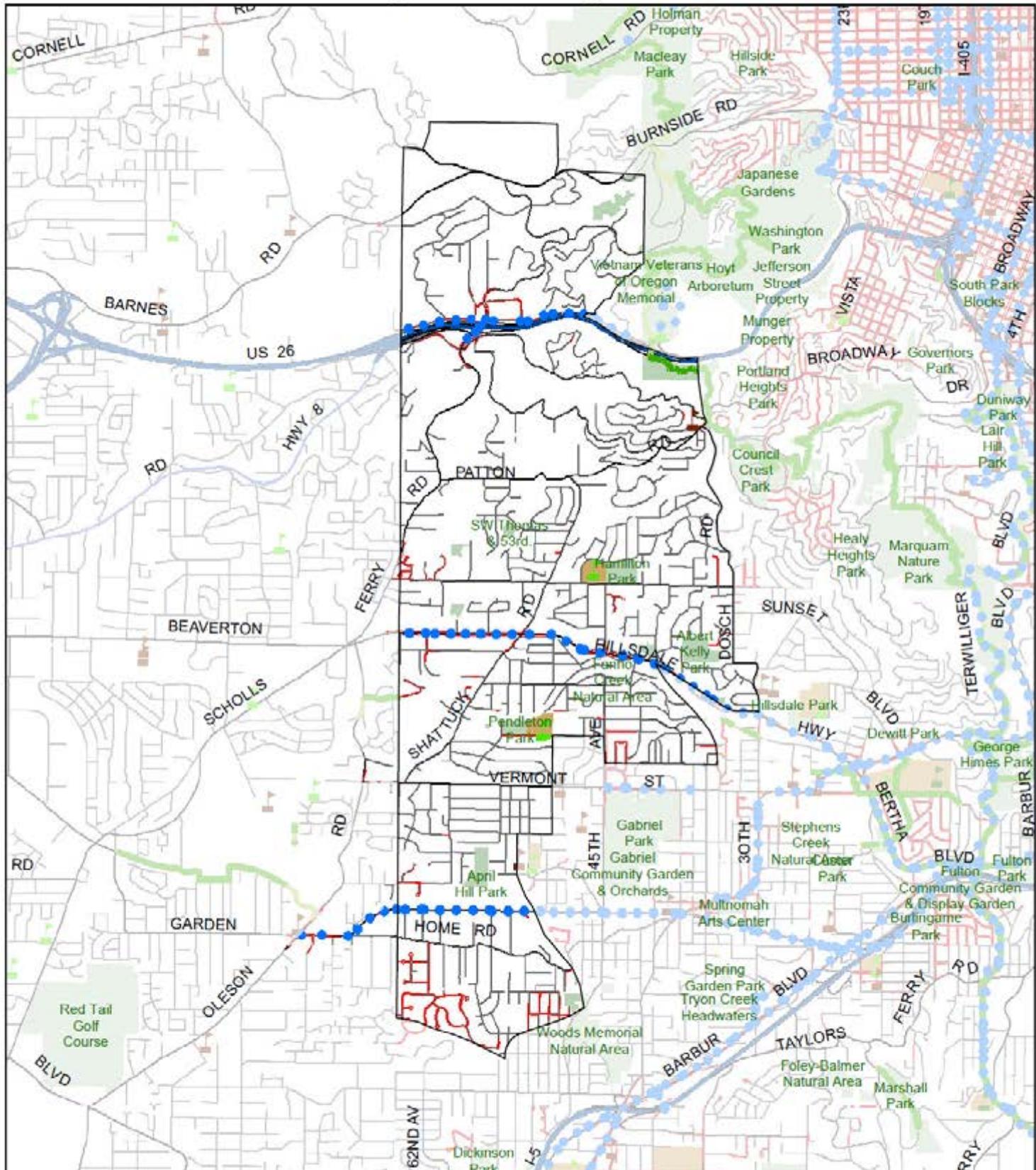


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City of Portland, Oregon  
John Rogers, Mayor • Stacey Anderson, Director

# Raleigh Hills Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- Existing Bike Facility  
regional trails outside  
Portland (existing)
- Existing Bike Facility  
regional trails in Portland

- Public HS
- Public K-8
- Private Schools



Feet  
0 1,000 2,000 3,000

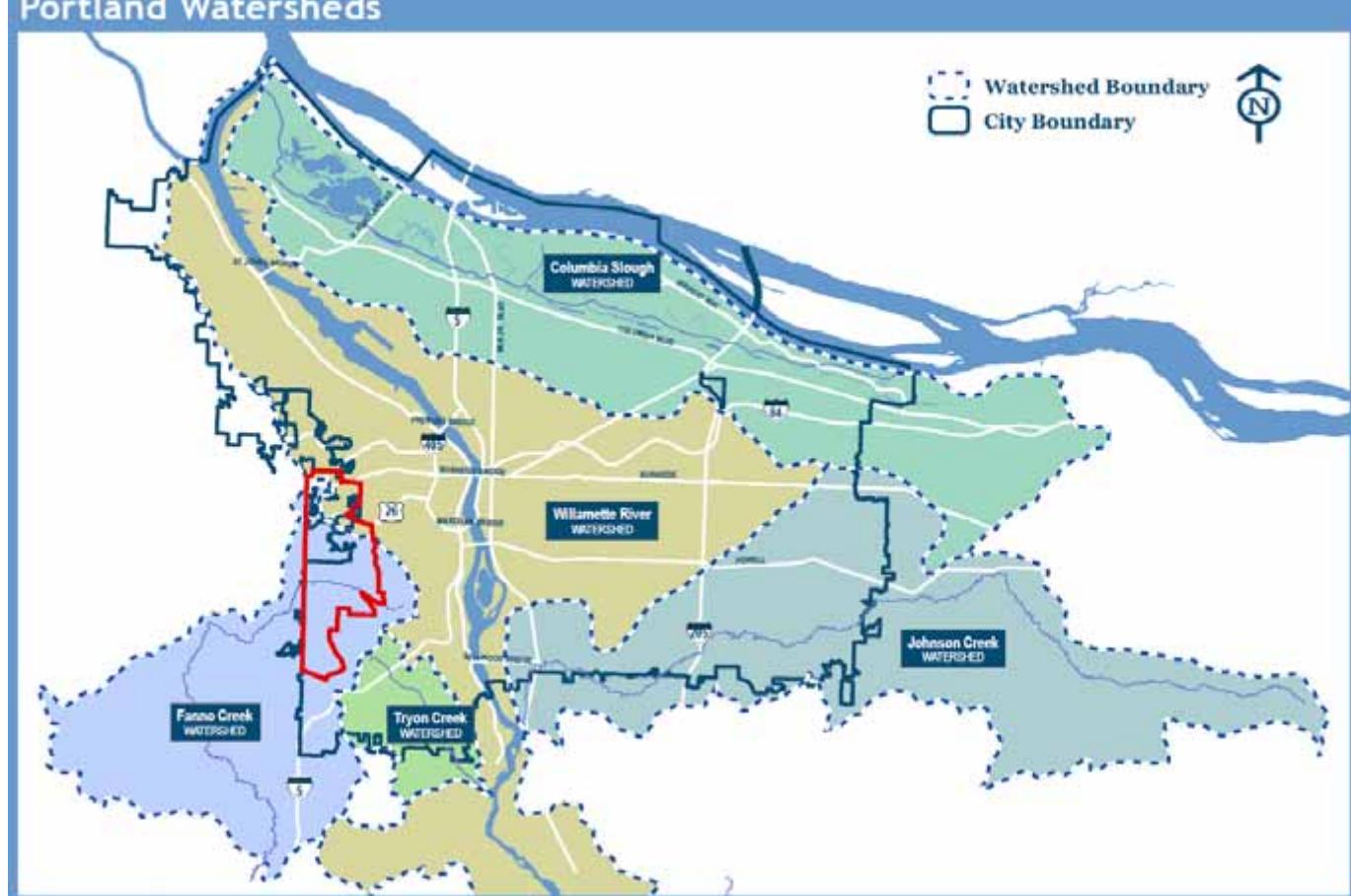


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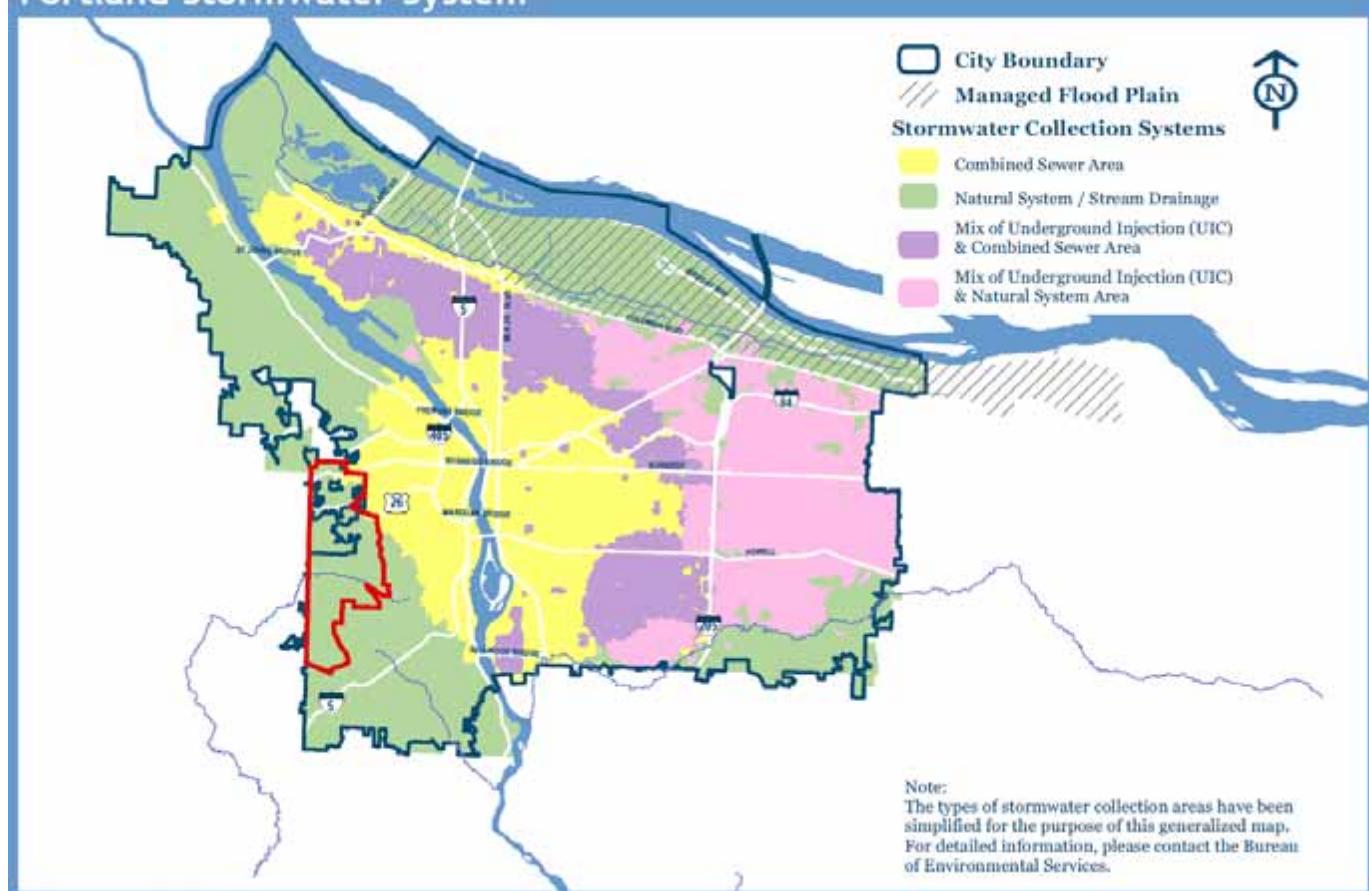


City of Portland, Oregon  
Sam Adams, Mayor • Jason Anderson, Director

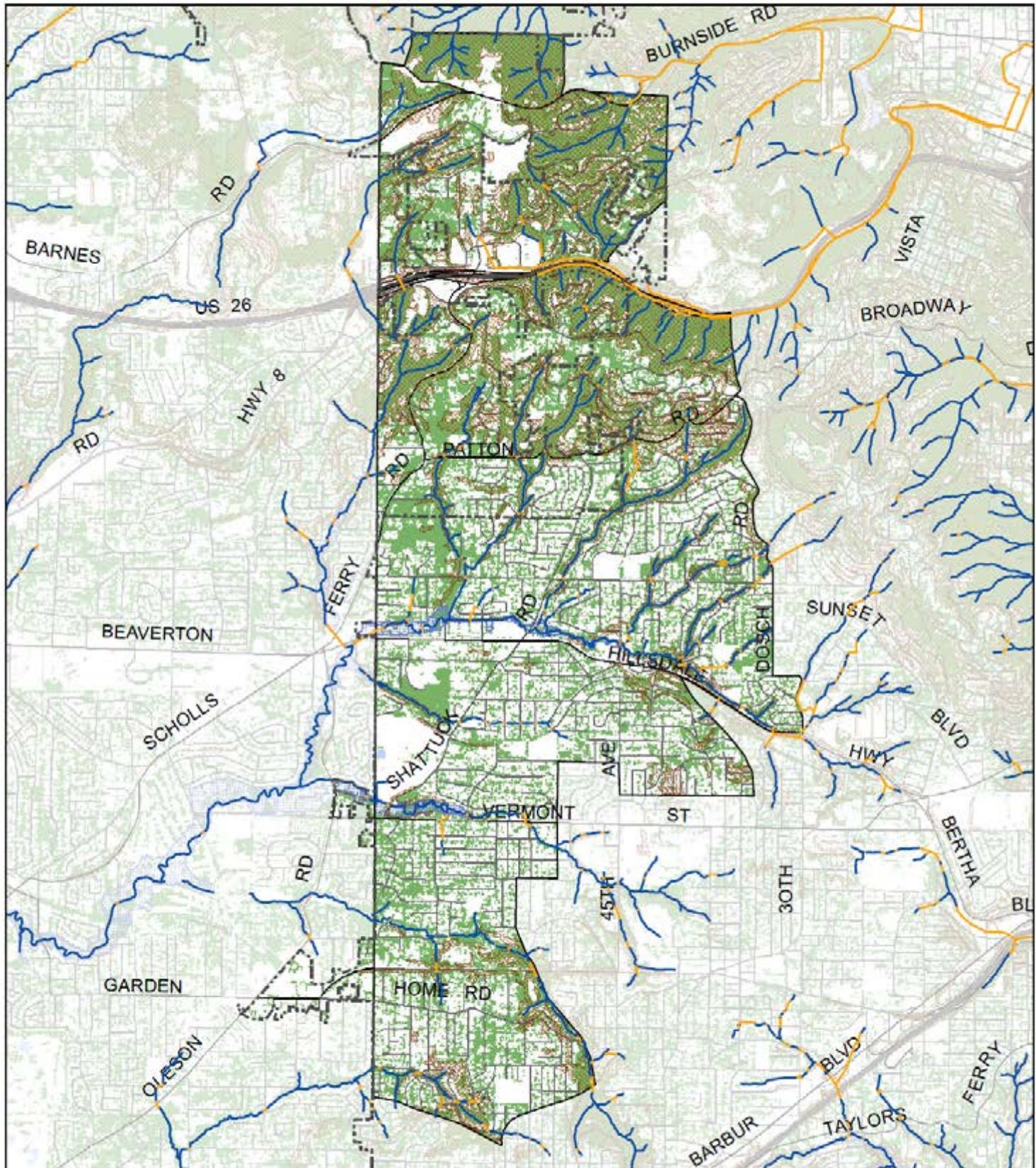
## Portland Watersheds



## Portland Stormwater System



# Raleigh Hills Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



# Raleigh Hills Analysis Area

## Demographics (2000 – 2010)

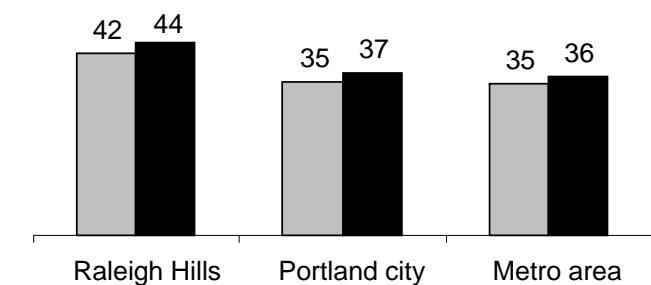
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

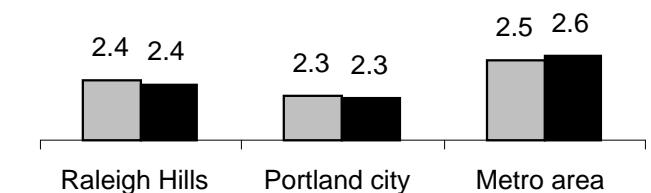
	Raleigh Hills	Portland city	Metro area
2010	16,347	583,776	2,226,009
2000	16,413	529,121	1,927,881
% change	0%	10%	15%

■ 2000 ■ 2010

### Median Age

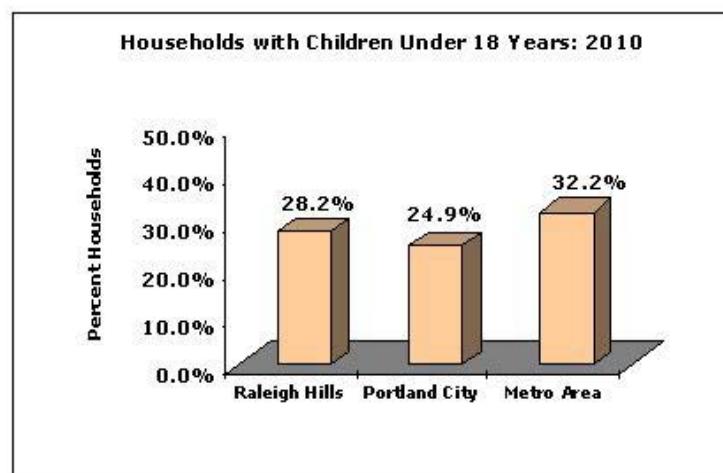
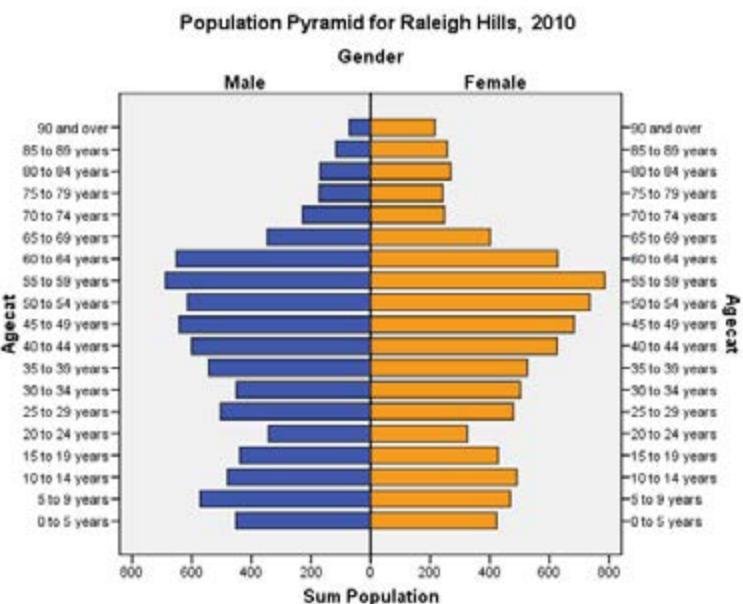
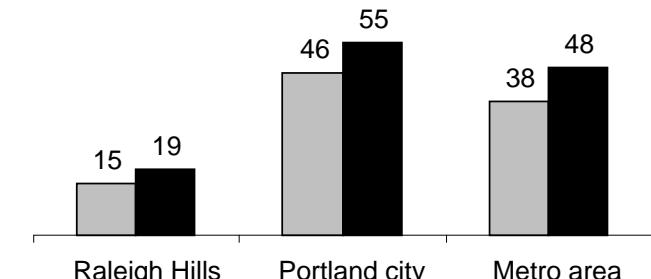


### Average Household Size

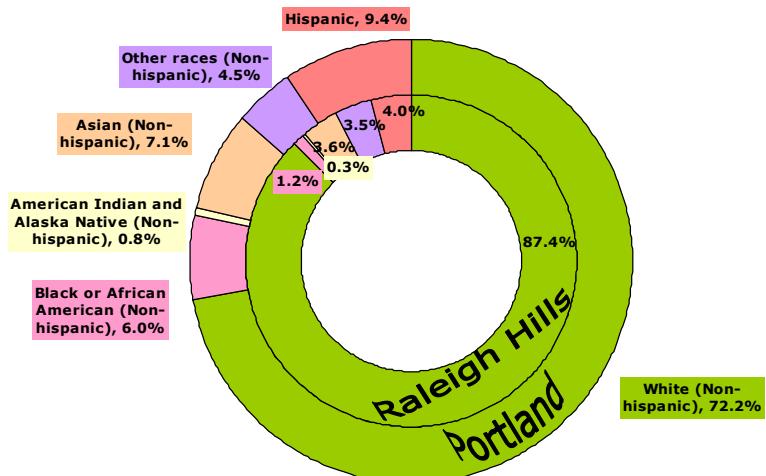


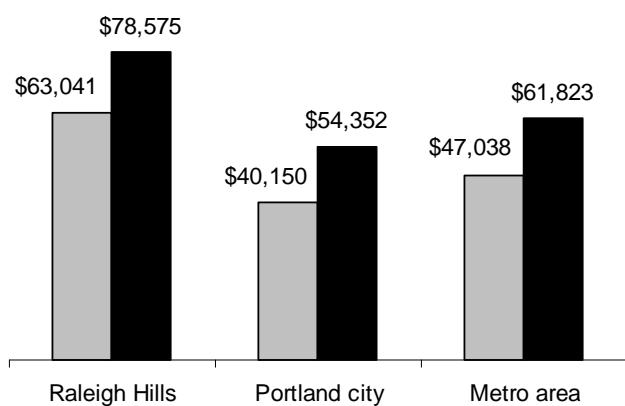
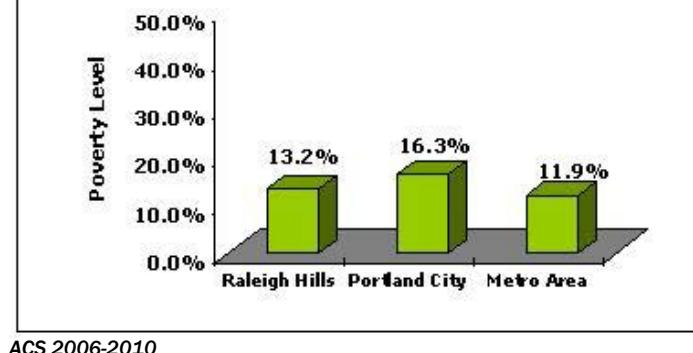
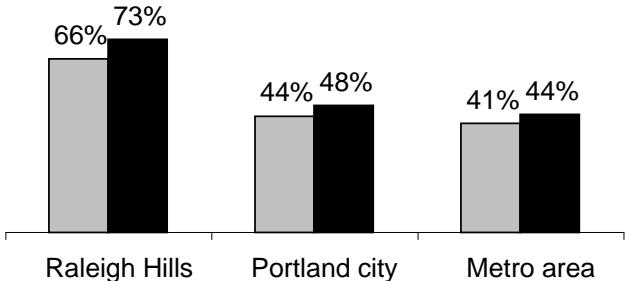
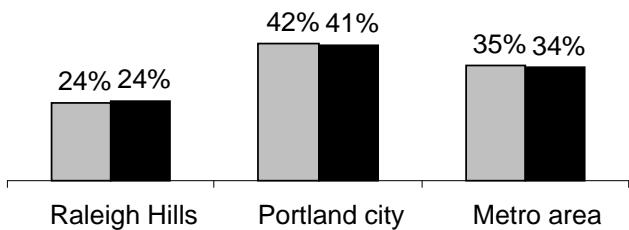
### Diversity Index

(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



### Racial and Ethnic Distribution in Portland vs. Raleigh Hills



**Median Household Income****Percent Below Poverty: 2010****Percent College Graduates****Percent Renters of Occupied Housing Units****Median Home Value**

	Raleigh Hills	Portland city	Metro area
2010	\$392,082	\$253,184	\$273,500
2000	\$234,420	\$154,721	\$168,347
% change	67.3%	63.6%	62.5%

# Raleigh Hills Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

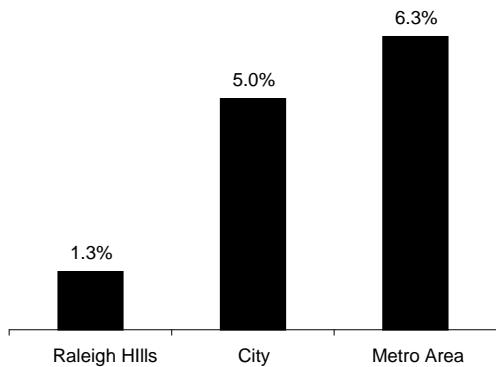
Raleigh Hills	City	Metro Area
136,301	51,937,895	107,875,146

### OFFICE SPACE

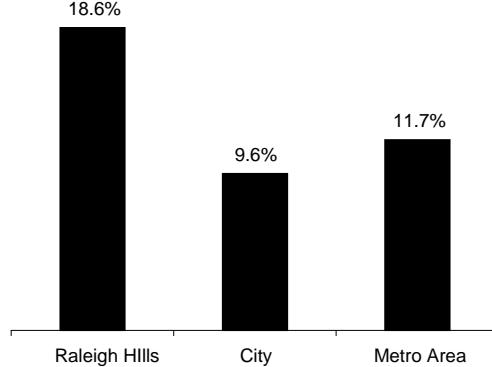
#### Square Feet

Raleigh Hills	City	Metro Area
321,100	54,348,765	92,465,455

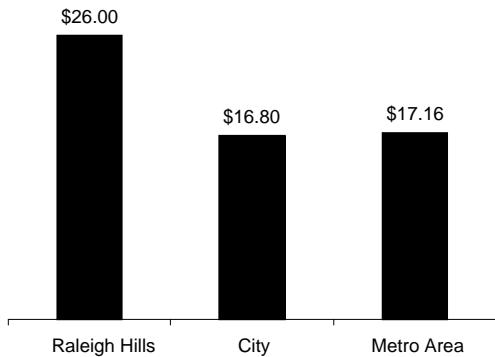
#### Retail Vacancy



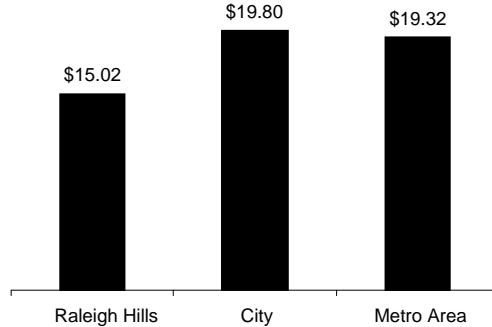
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Raleigh Hills Analysis Area

## Retail Market Profile

**Retail Gap = \$221 million**

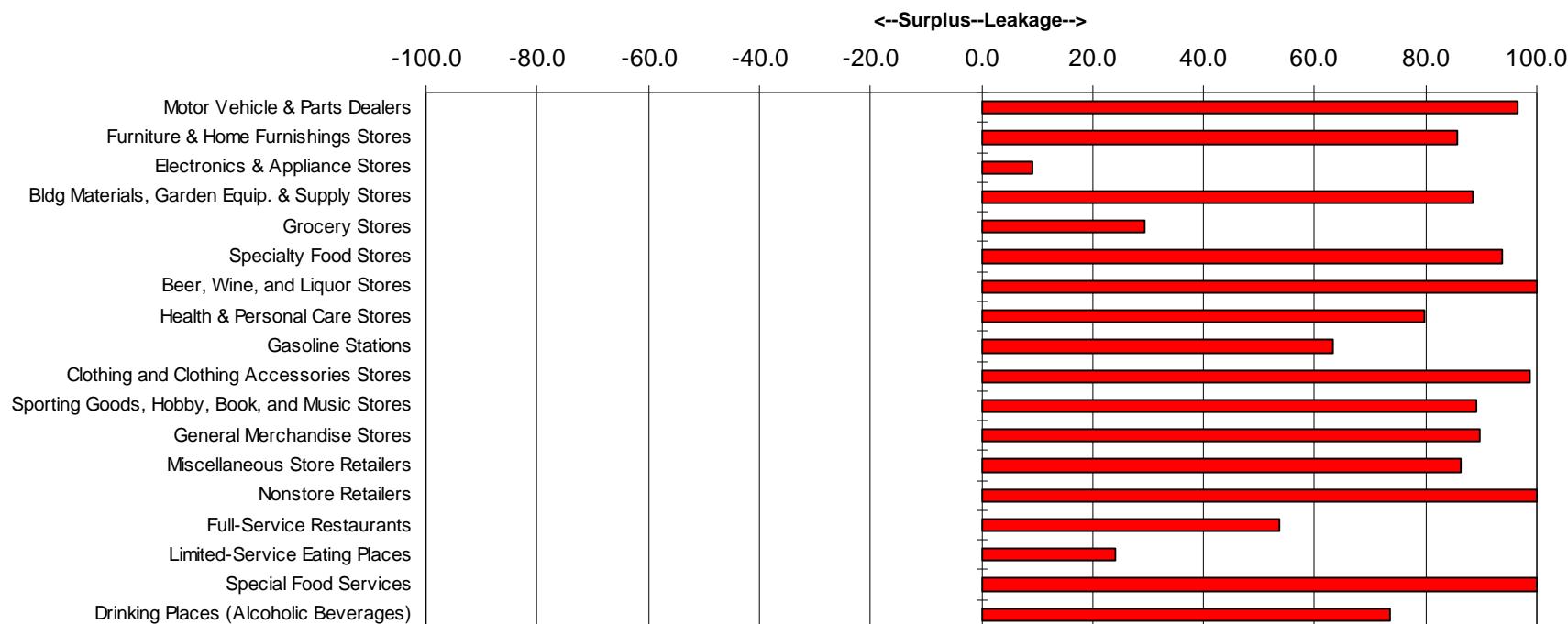
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$282,262,925	\$60,834,720	<b>\$221,428,205</b>	<b>64.5</b>	57
Total Retail Trade (NAICS 44-45)	\$241,655,881	\$44,997,553	<b>\$196,658,328</b>	<b>68.6</b>	43
Total Food & Drink (NAICS 722)	\$40,607,044	\$15,837,167	<b>\$24,769,877</b>	<b>43.9</b>	14

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Raleigh Hills Analysis Area

## Employment

Quarterly Census of Employment and Wages data for 2002 & 2008

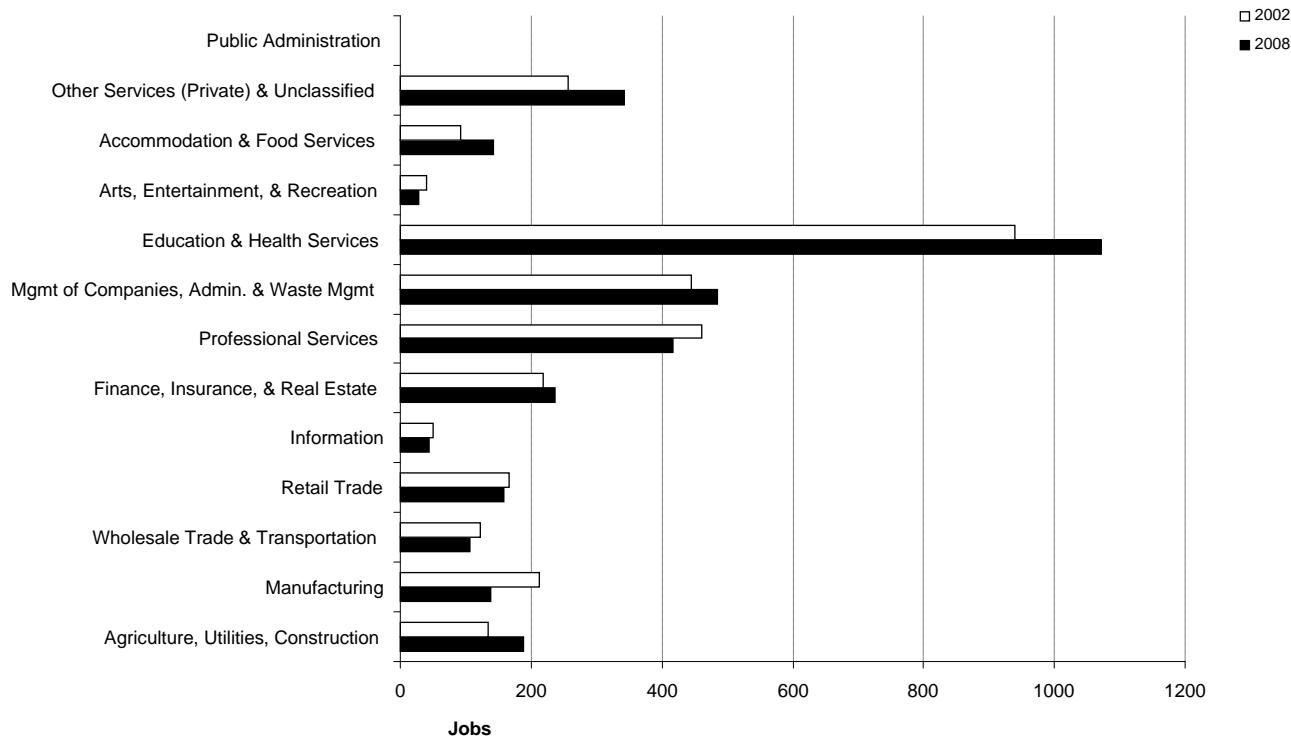
Source: Oregon Employment Department (OED)

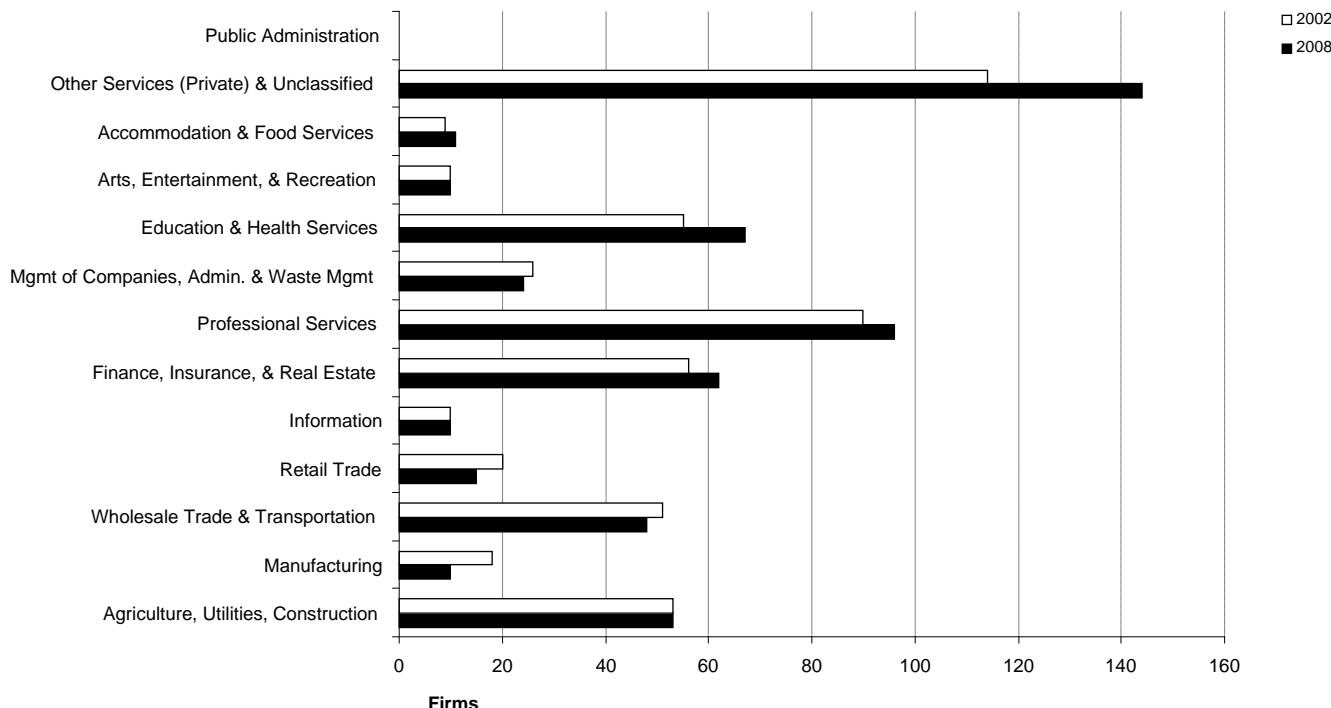
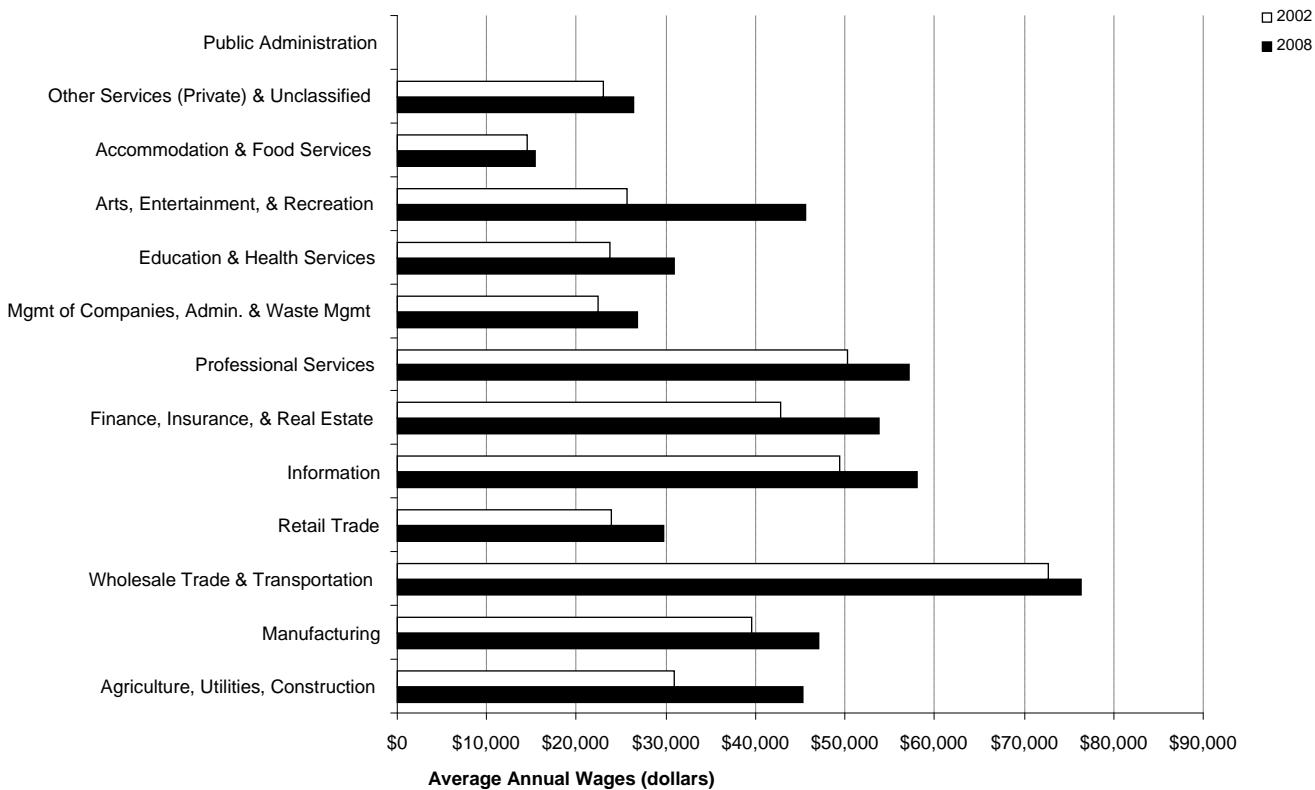
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*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	3,143	3,360	+217
Total Firms	512	550	+38
Average Annual Wages	\$32,193	\$37,437	+5,244

### Total Jobs



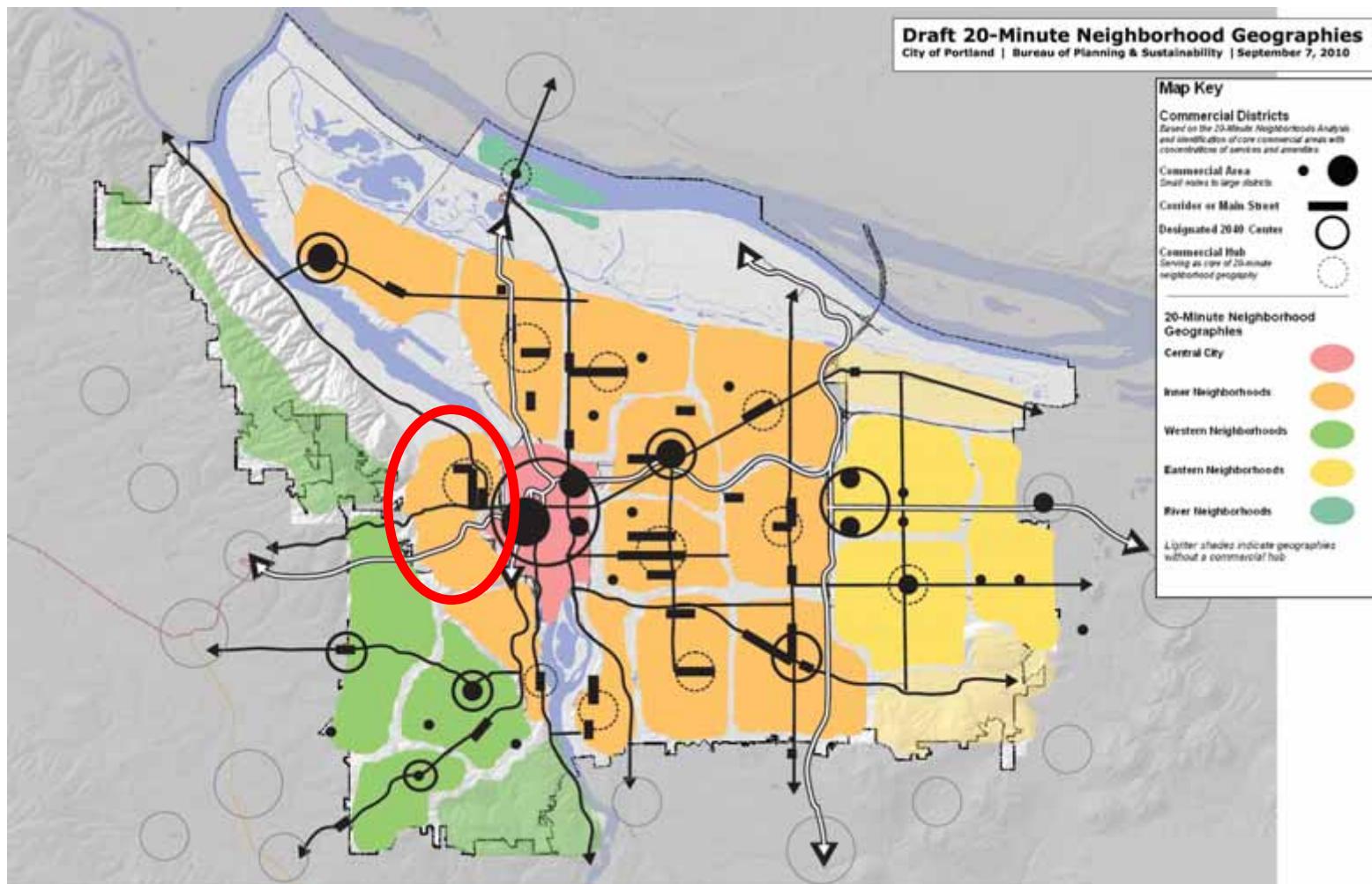
**Total Firms****Average Annual Wages**



## Northwest Analysis Area

Including Northwest District, Hillside, Arlington Heights, and parts of the Southwest Hills Residential League and Goose Hollow neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# **Northwest Analysis Area**

## **Services and Amenities**

### **Commercial Districts**

*Population: 21,900 people (12,800 households)  
Land Area: 4.0 sq. miles (5,400 people per sq. mile)*

The area's largest concentrations of commercial services are the historic main street corridors along NW 23<sup>rd</sup> and NW 21st. Other concentrations of commercial services are located along NW Thurman and along West Burnside. These commercial areas are all located in the low-lying "flats" of the analysis area, as the upland "heights" of the West Hills are primarily residential.

**Grocery stores:** 5 (1 store per 2,560 households)

**Retail gap:** \$57 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### **Community Amenities**

#### **Proximity to Services and Amenities**

##### **Percentage of population:**

Within 1/2 mile of a park*:	73%
Within 1/2 mile of a public elementary school:	56%
Within 3 miles of a full-service community center*:	75%
Within 1/2 mile of a full-service grocery store:	61%
Within 1/4 mile of a frequent service transit stop:	51%

\*Parks Bureau service standard

**Community Centers:** 1 (Hillside Community Center)

**Libraries:** 1 (Northwest Library)

**Parks and Open Spaces:** 722 acres – including Washington Park, Marquam Nature Park, Pittock Mansion Acres, and Macleay, Wallace, Hillside, Couch, Governors, and Portland Heights parks.

**Tree Canopy Coverage:** 53%

**Public Schools:** 3 K-8 schools (Ainsworth and Couch elementary schools, Multnomah Learning Center K-12)

**Colleges (campus):** 1 (Linfield College – Portland Campus)

**Hospitals:** 1 (Good Samaritan Hospital and Medical Center)

**Farmers Markets:** 1 (Northwest Portland Farmers Market)

**Transit Centers/Stations:** 1 (Washington Park light rail station [Civic Plaza light rail station located adjacent to analysis area in Goose Hollow])

**Walkable Access Score:** 39 (out of 100) – *Note that this is the averaged score is for the entire analysis area. Walkable access scores for the flats and heights portions are:*  
*Flats (NW District and part of Goose Hollow): 73*  
*Heights/hillside areas: 22*  
*(from 20-Minute Neighborhoods Analysis Index)*

### **Neighborhood and Business Associations**

**Neighborhood Associations:** Northwest District, Hillside, Arlington Heights, and parts of the Southwest Hills Residential League and Goose Hollow

**Business Associations:** Nob Hill Business Association

## Urban Form Characteristics

The area includes two distinct geographies: the “flats” with their compact street grid hosting a diverse mix of houses and apartment buildings on small lots and series of historic main street commercial areas, and the predominantly residential hillside “heights”. The hillside areas, located in the West Hills (Tualatin Mountains) feature narrow, curvilinear streets following topography, as well as rectilinear blocks on plateau areas. The area is bordered by the Central City to the east and the Guild’s Lake industrial area to the north.

**Access issues.** The area’s flats feature good street and sidewalk connectivity, but the heights lack street connectivity and accessibility is limited by topography. Public stairways provide additional pedestrian connections in hillside areas. The flats have good access to transit and to commercial and community services. Adjacency to the Central City and Guild’s Lake industrial area provide good access to jobs, services and cultural amenities.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region’s growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	3.6 miles (NW 23 <sup>rd</sup> , NW 21 <sup>st</sup> , Burnside, Lovejoy, Thurman)
Station Communities:	2 (one is outside but adjacent to this analysis area)

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	814	42%	143
Multi-Family Residential:	234	12%	51
Commercial/Mixed-Use:	188	10%	53
Employment:	16	.8%	2
Industrial:	111	6%	19
Open Space:	591	30%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

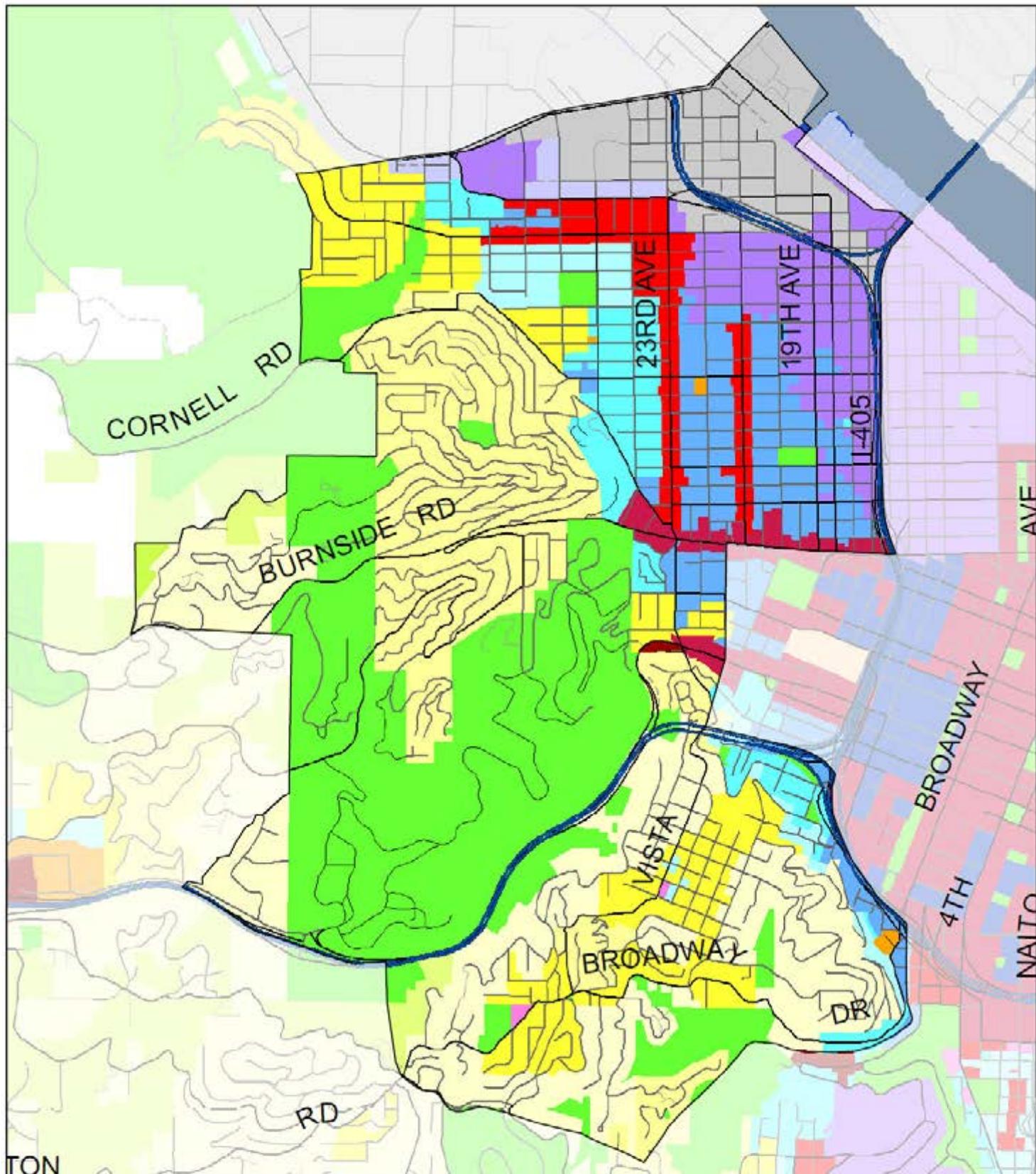
2010 Housing Units (Census):	14,393
2035 Housing Units:	19,500

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Northwest Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet



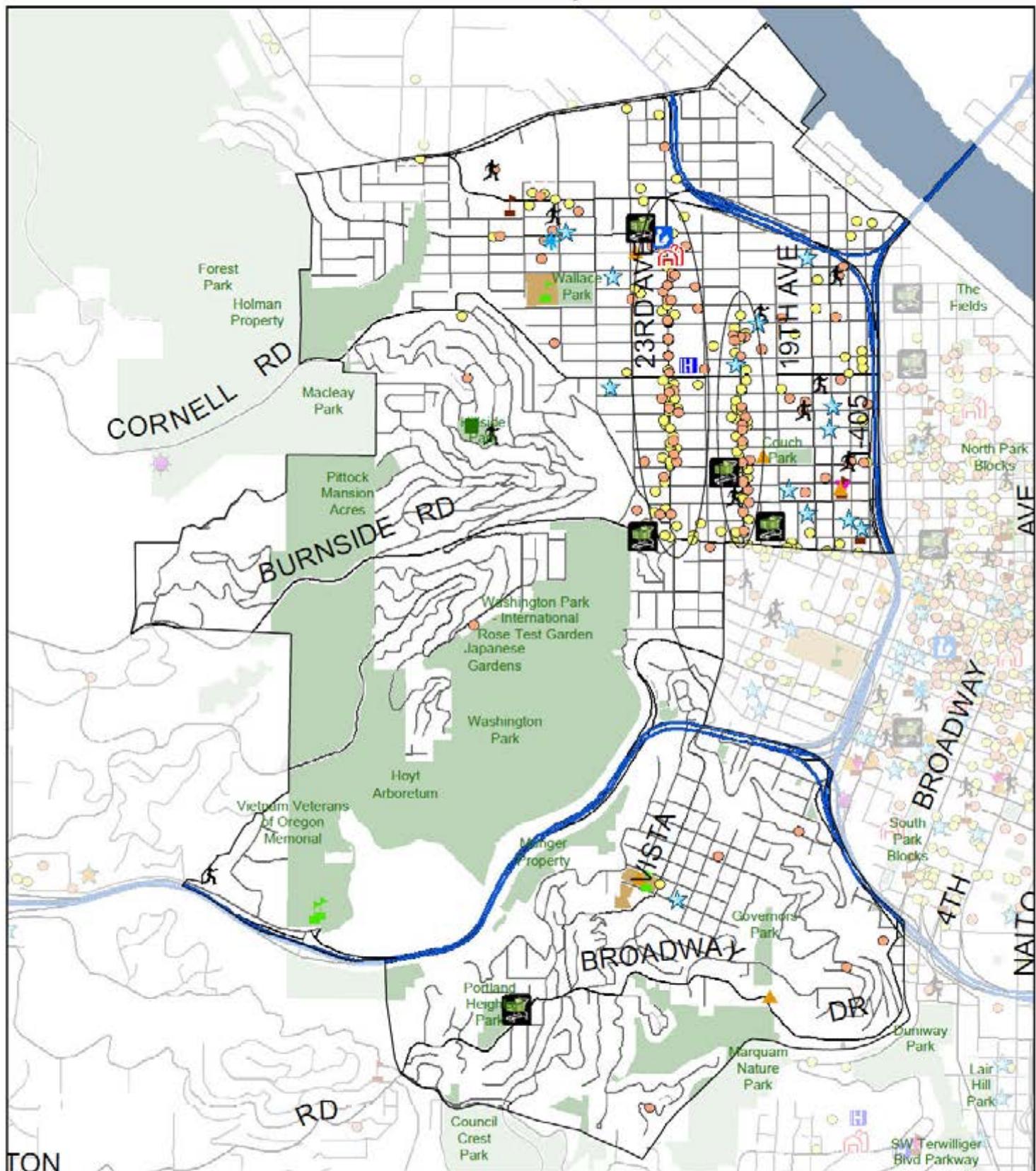
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City of Portland, Oregon

Tom Adams, Mayor • Susan Anderson, Director

# Northwest Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Preschools
- Daycare Centers
- Public HS
- Public K-8
- Private Schools
- Libraries
- Farmers Markets
- Community Gardens
- Community Centers
- County Health Clinic
- County Aging Services

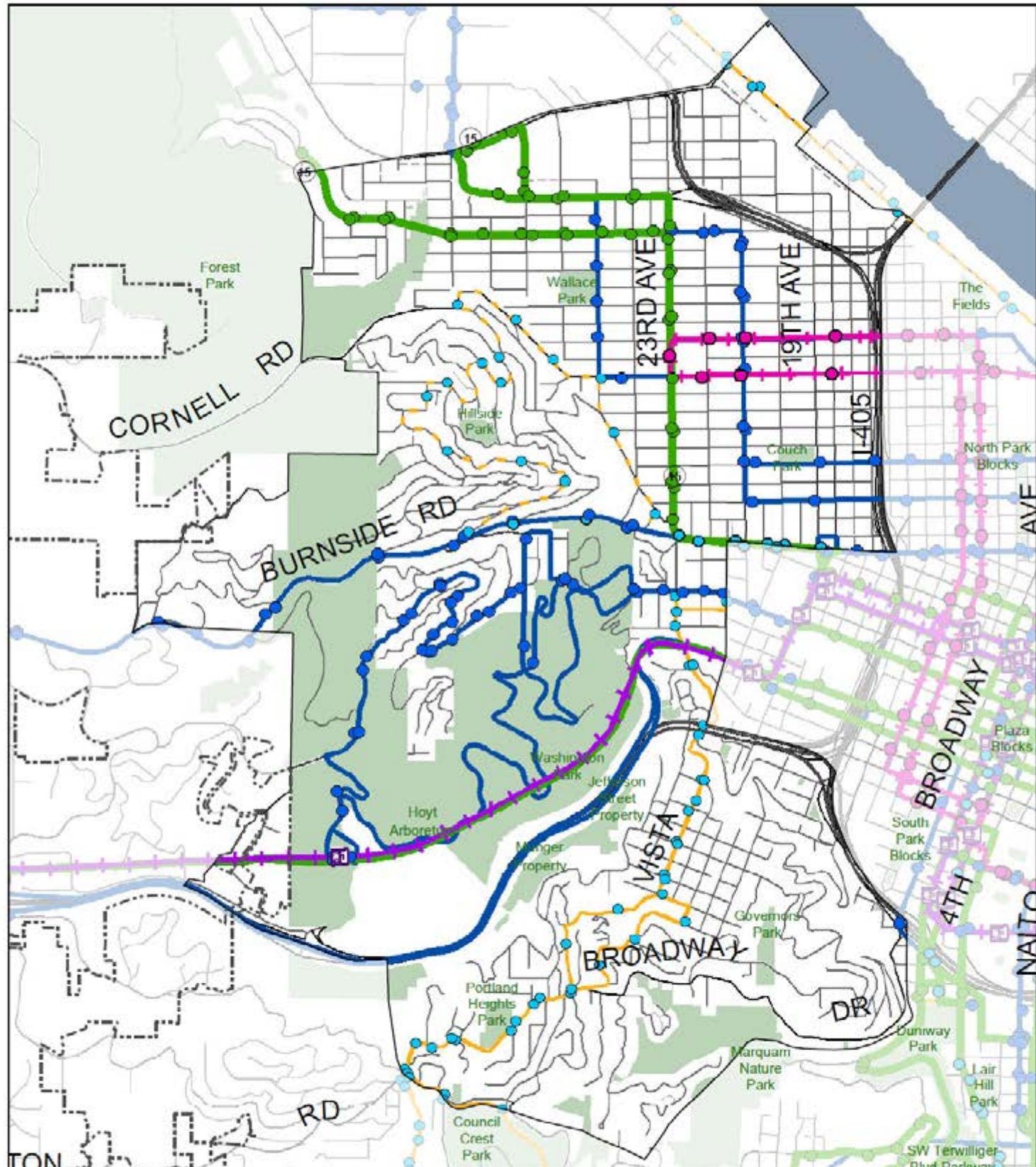


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# Northwest Analysis Area



## Transit Infrastructure

February 1, 2012

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- | Light Rail Stops | Bus Stops                |
|------------------|--------------------------|
| ■ MAX            | ● Frequent Stops         |
| ● Street Car     | ● Standard Stops         |
| ■ MAX            | ● Rush Hour Stops        |
| ■ Streetcar      | ■ Frequent Service       |
|                  | ■ Standard Service       |
|                  | ■ Rush Hour Only Service |
|                  | — City Boundary          |



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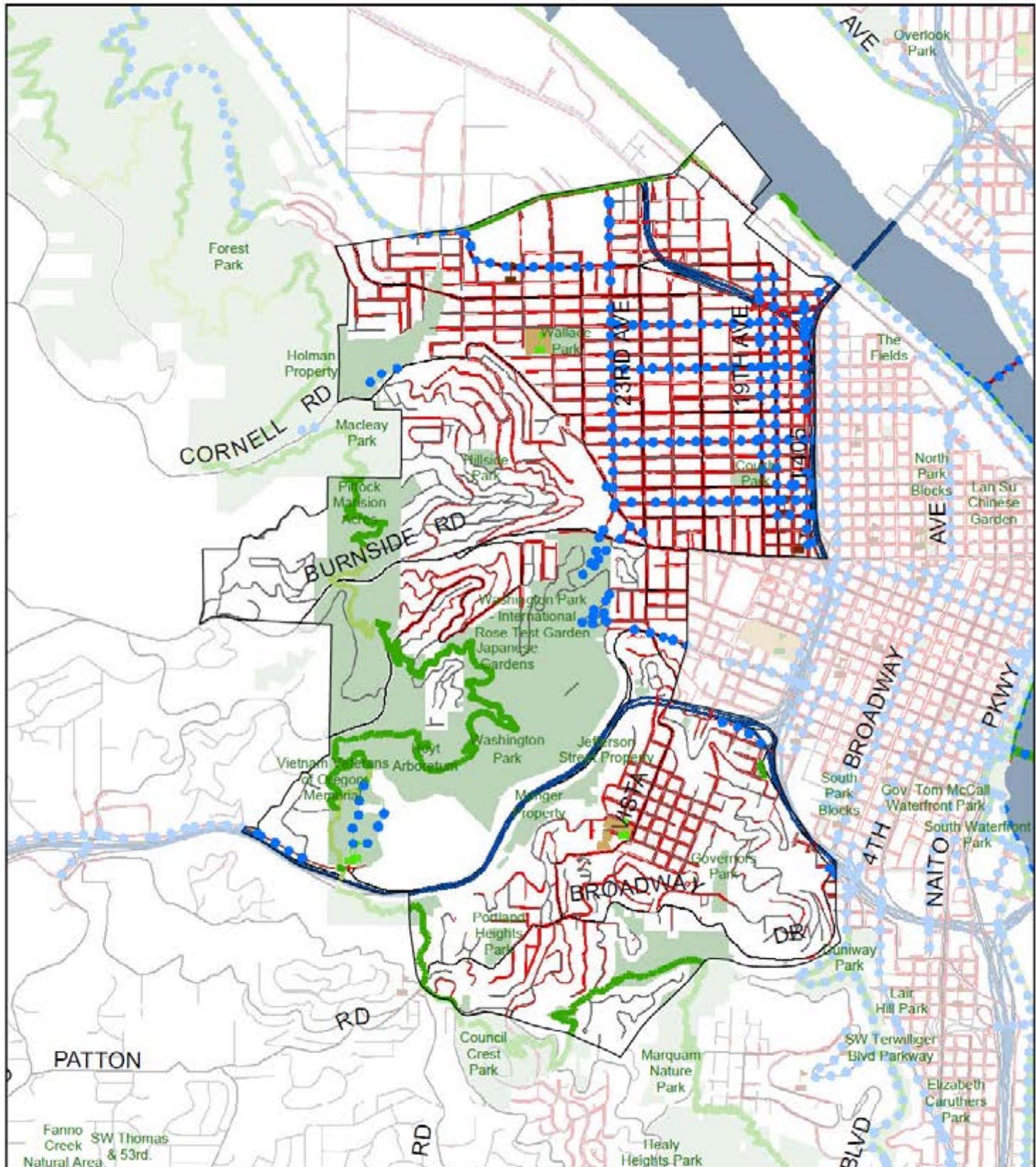


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# Northwest Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet

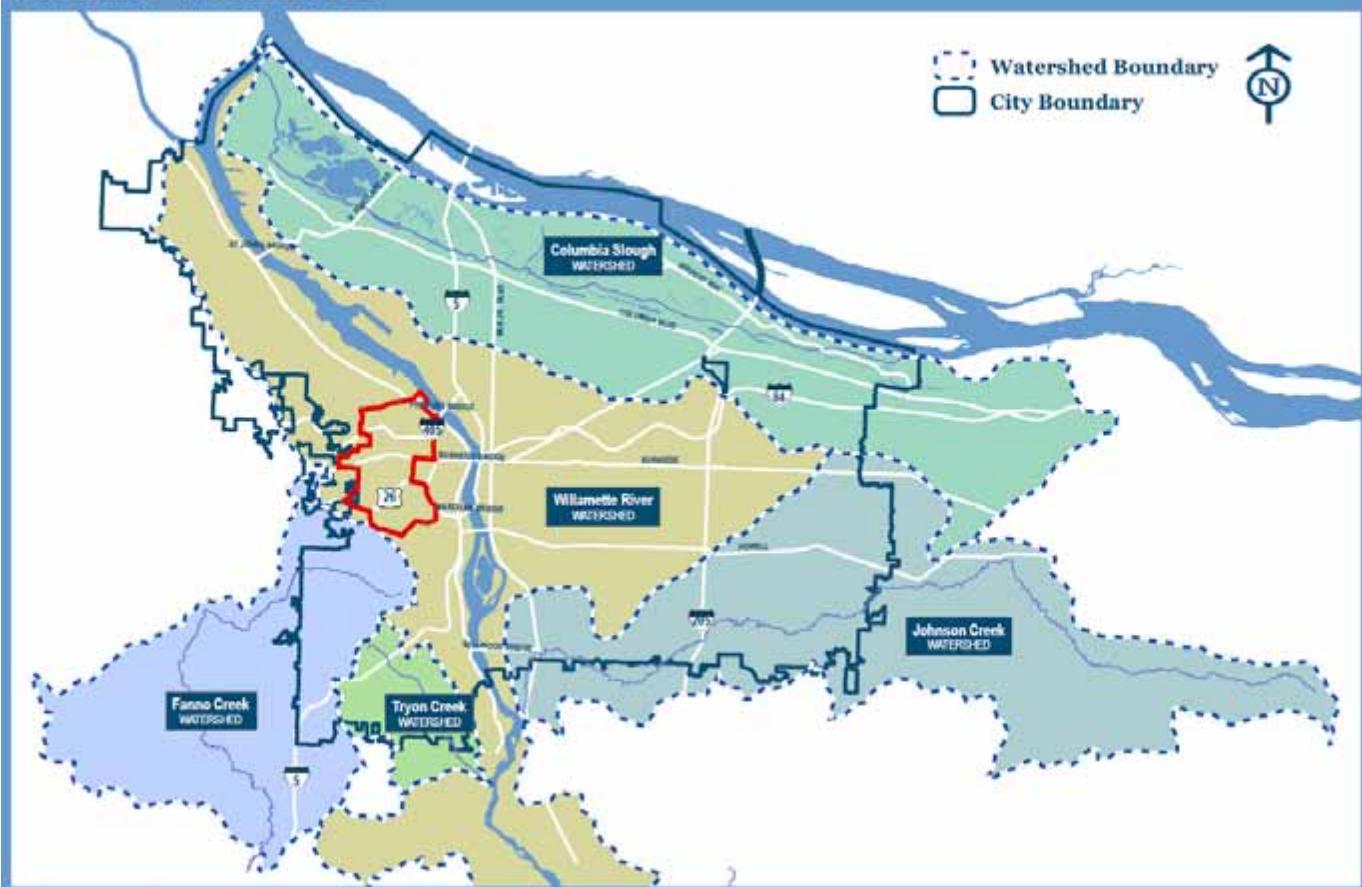


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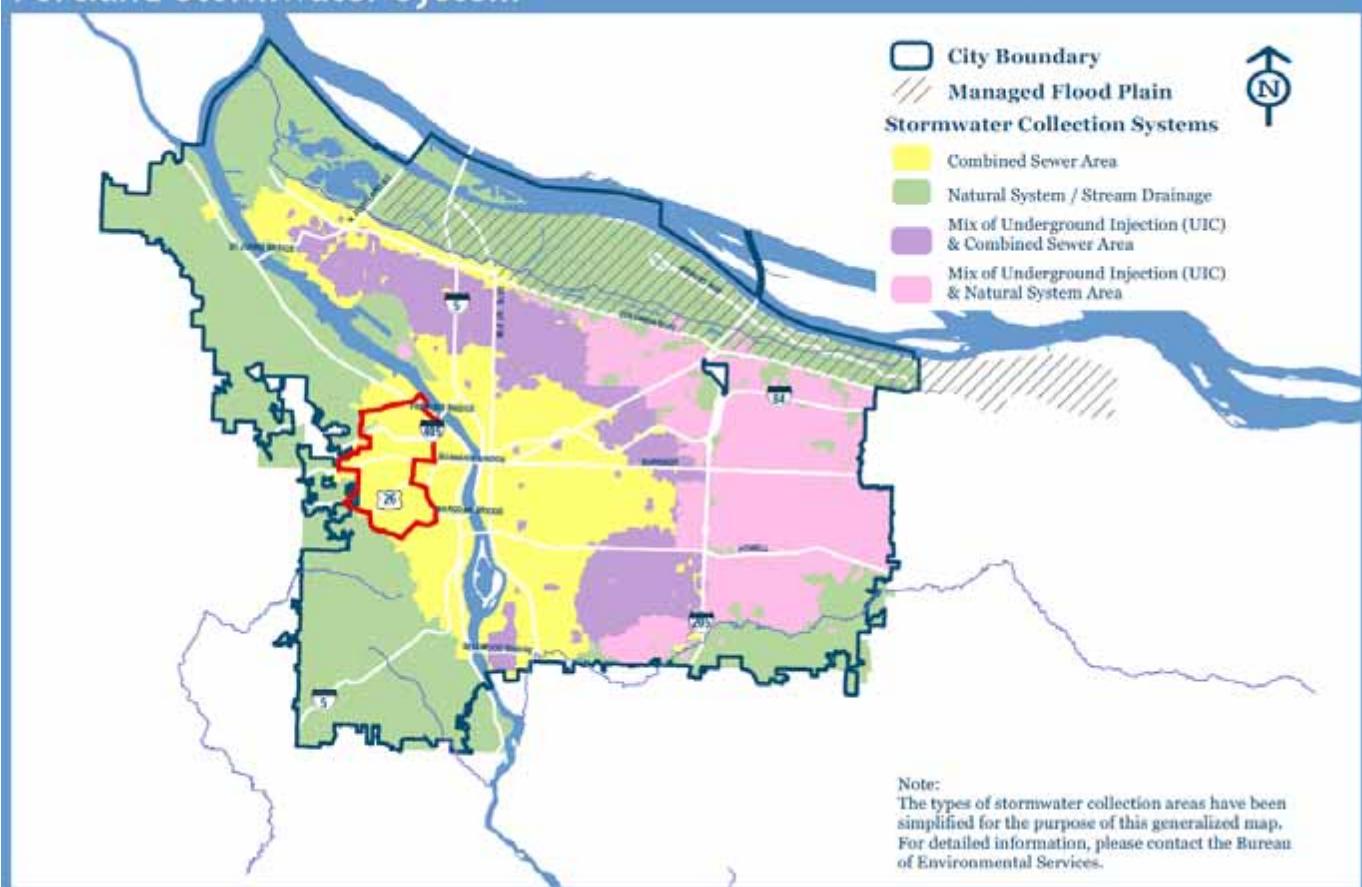


City of Portland Mayor - Sam Adams, Director - Jason Anderson

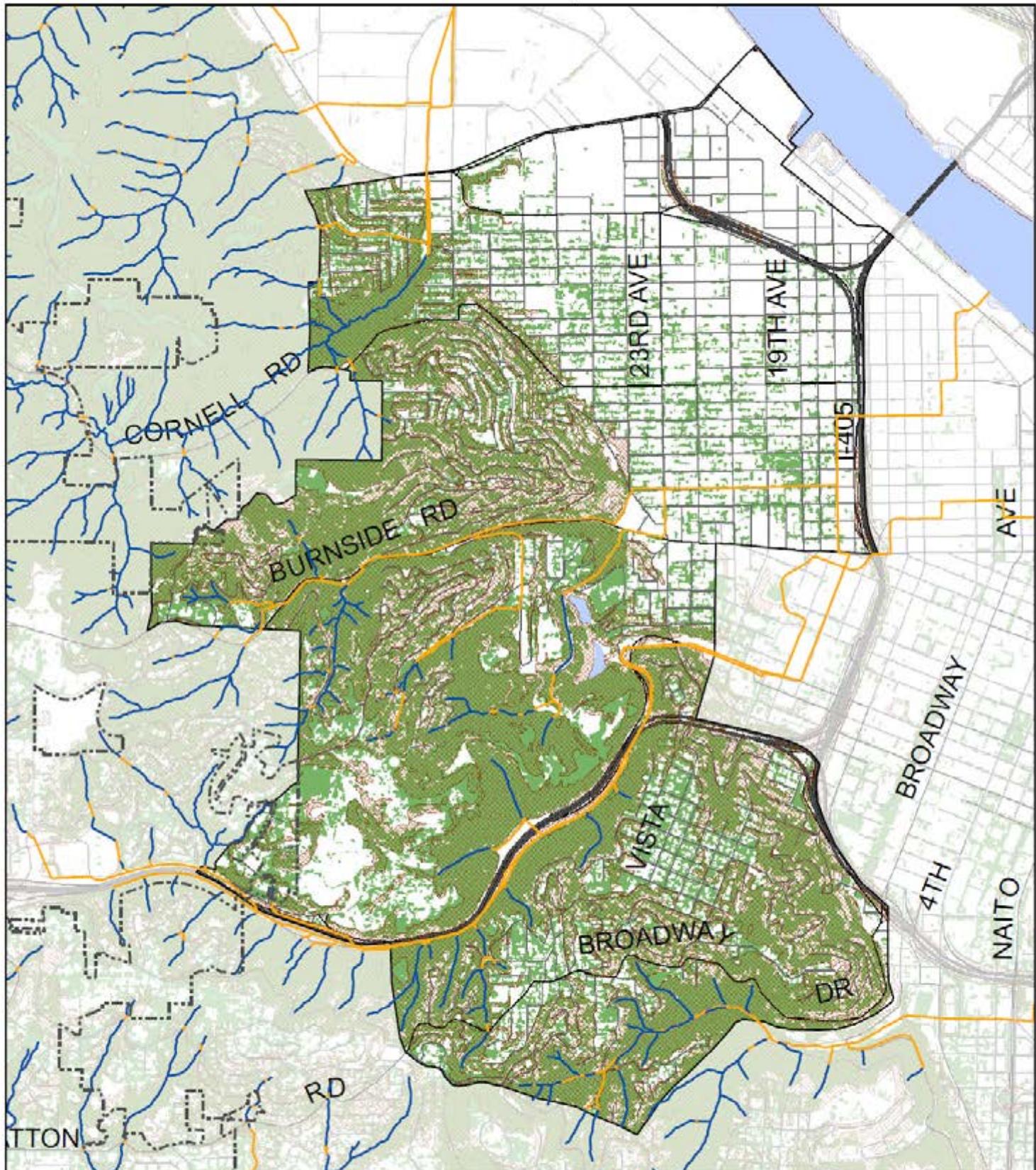
## Portland Watersheds



## Portland Stormwater System



## Northwest Analysis Area



### Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet

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# Northwest Analysis Area

## Demographics (2000 – 2010)

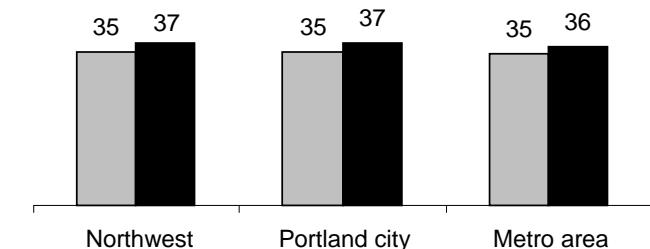
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

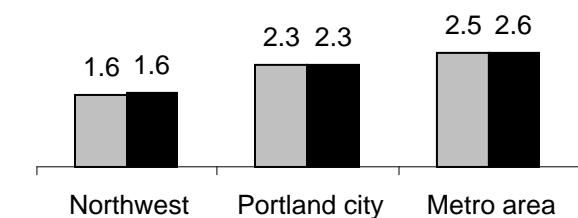
	Northwest	Portland city	Metro area
2010	21,857	583,776	2,226,009
2000	20,014	529,121	1,927,881
% change	9%	10%	15%

■ 2000 ■ 2010

### Median Age

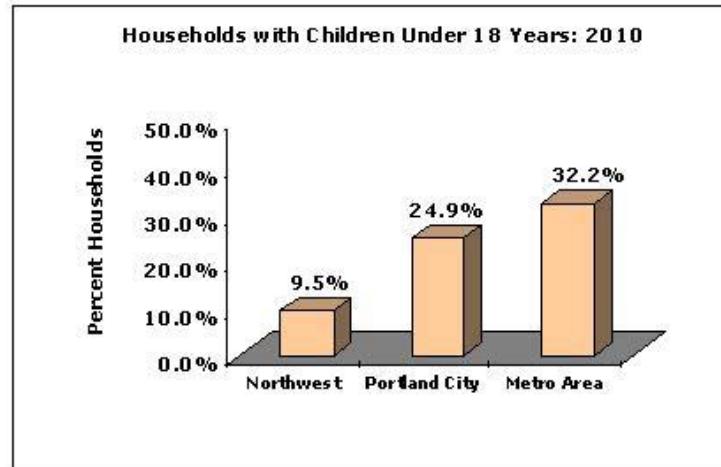
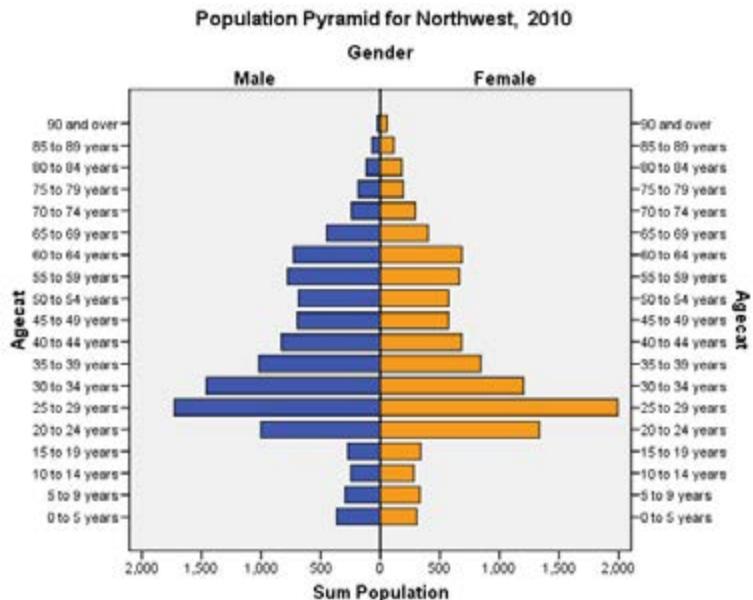
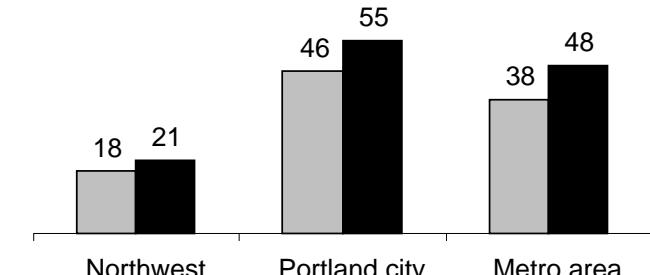


### Average Household Size

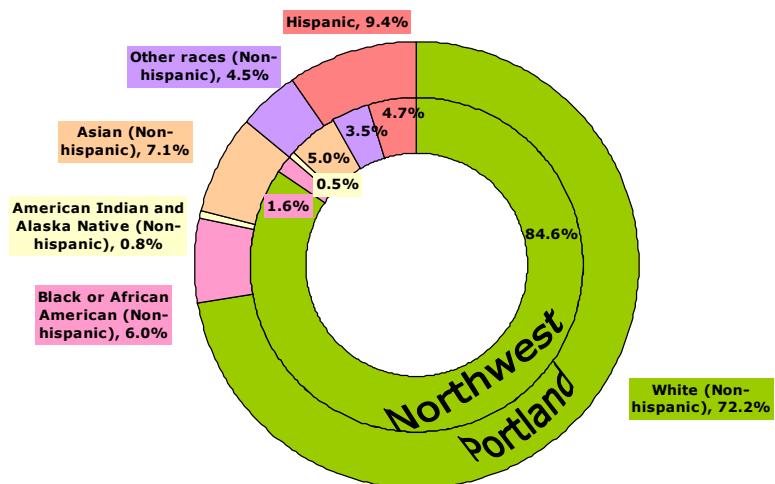


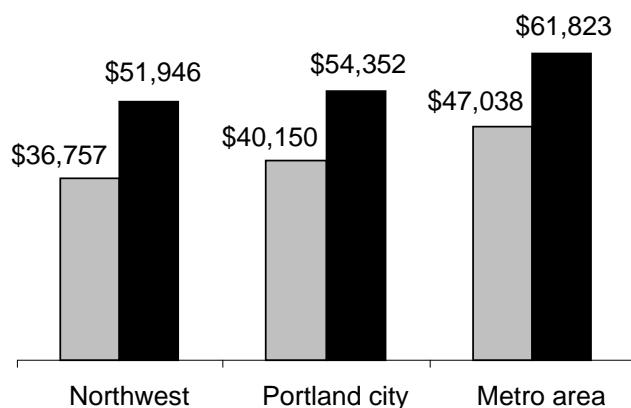
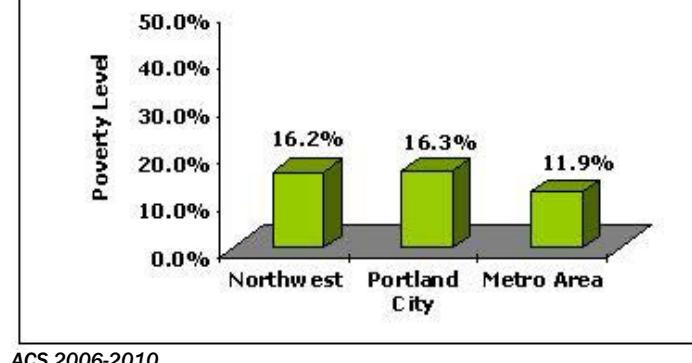
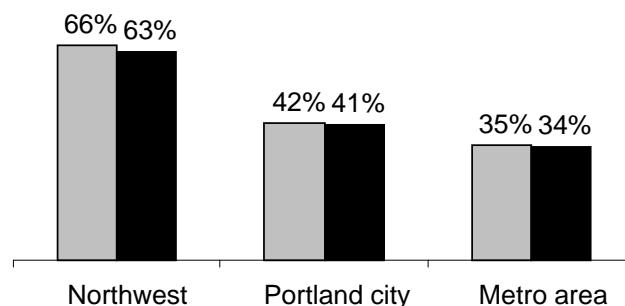
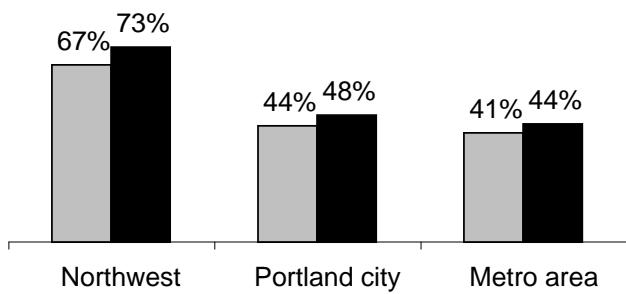
### Diversity Index

(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



### Racial and Ethnic Distribution in Portland vs. Northwest



**Median Household Income****Percent Below Poverty: 2010****Percent Renters of Occupied Housing Units****Percent College Graduates****Median Home Value**

	Northwest	Portland city	Metro area
2010	\$636,032	\$253,184	\$273,500
2000	\$387,319	\$154,721	\$168,347
% change	64.2%	63.6%	62.5%

## **Northwest Analysis Area**

### **Commercial Real Estate Indicators**

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

#### **RETAIL**

##### **Square Feet**

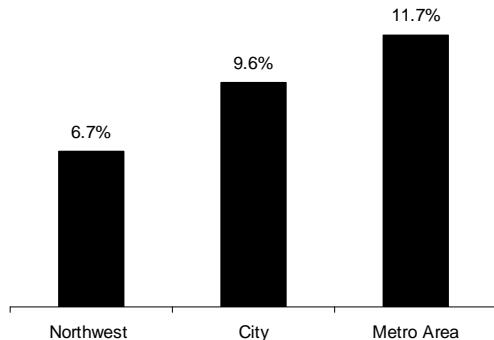
Northwest	City	Metro Area
2,531,441	51,937,895	107,875,146

#### **OFFICE SPACE**

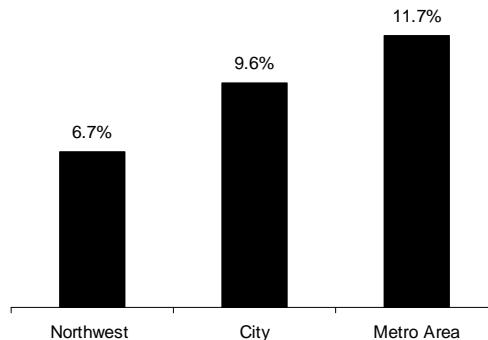
##### **Square Feet**

Northwest	City	Metro Area
3,771,729	54,348,765	92,465,455

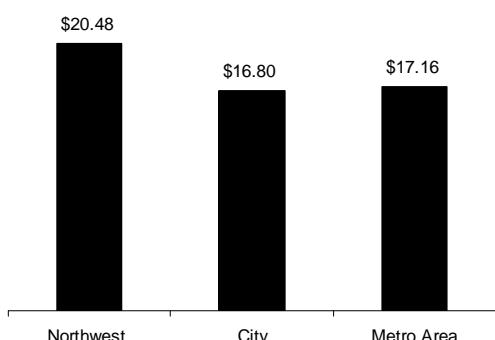
##### **Retail Vacancy**



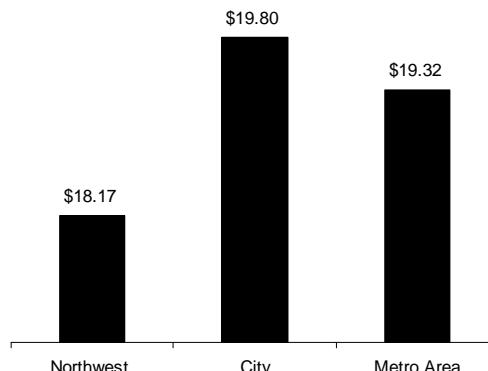
##### **Office Vacancy**



##### **Retail Rents**



##### **Office Rents**



# Northwest Analysis Area

## Retail Market Profile

**Retail Gap = \$57 million**

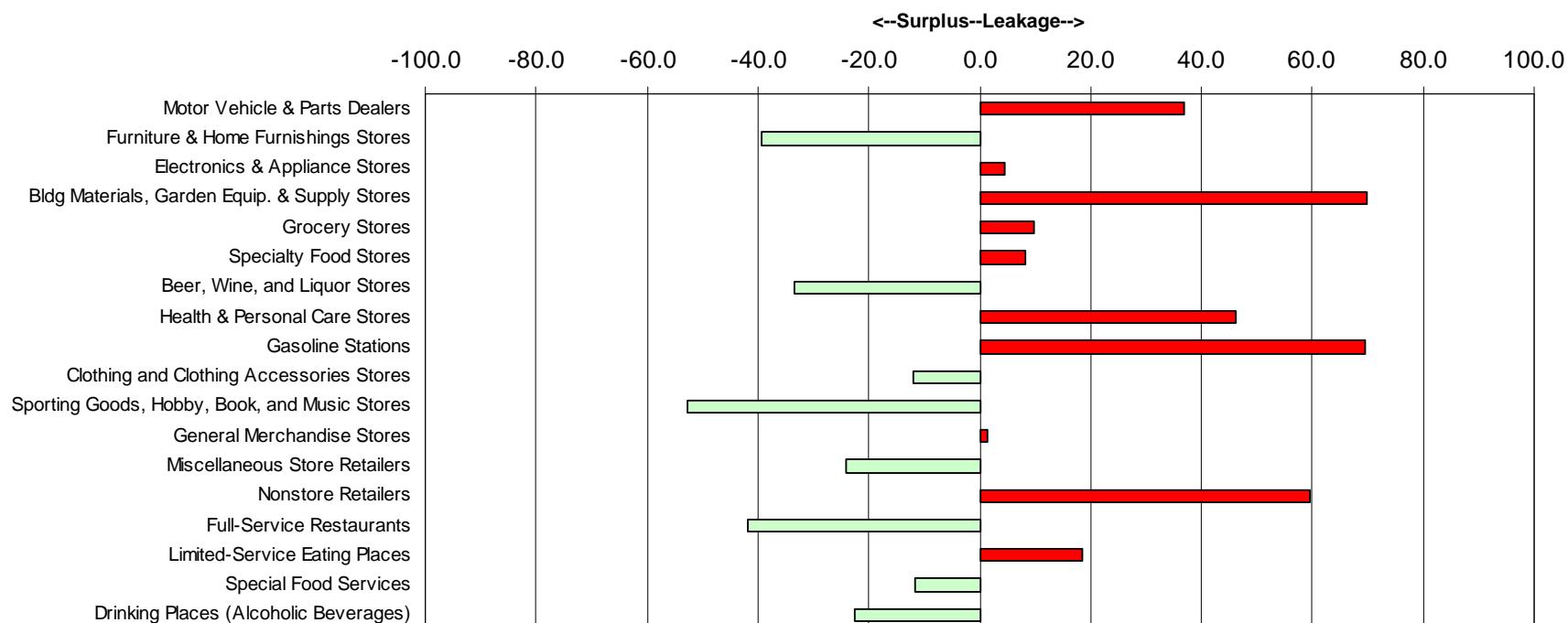
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$395,089,551	\$338,182,629	<b>\$56,906,922</b>	<b>7.8</b>	389
Total Retail Trade (NAICS 44-45)	\$335,912,117	\$254,912,308	<b>\$80,999,809</b>	<b>13.7</b>	250
Total Food & Drink (NAICS 722)	\$59,177,434	\$83,270,321	-\$24,092,887	-16.9	139

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# **Northwest Analysis Area**

## **Employment**

---

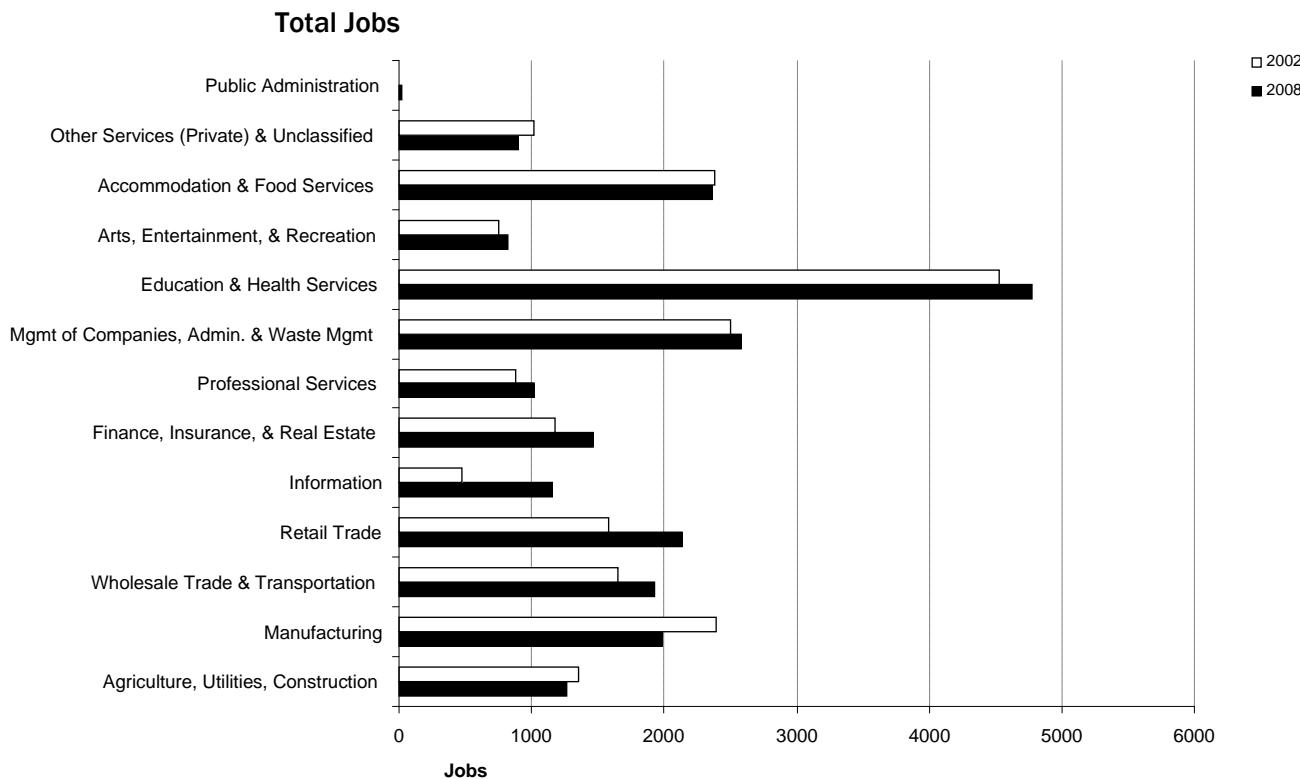
Quarterly Census of Employment and Wages data for 2002 & 2008

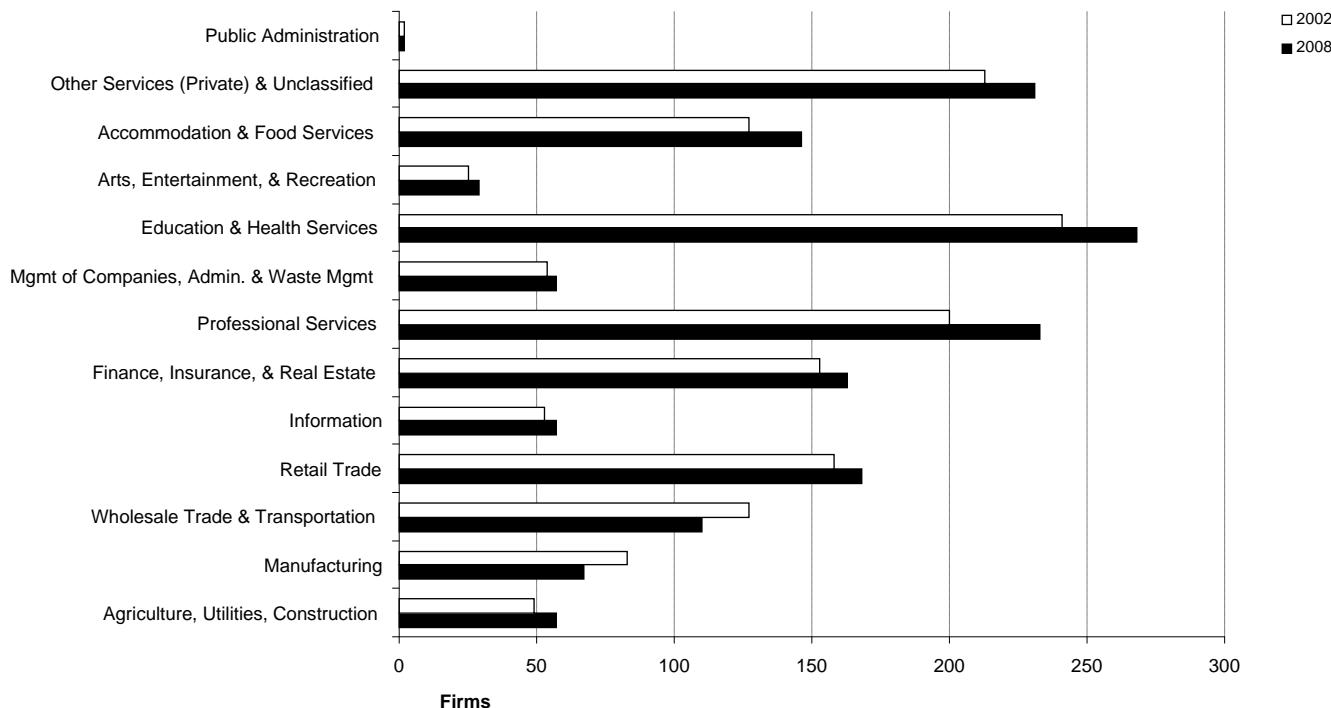
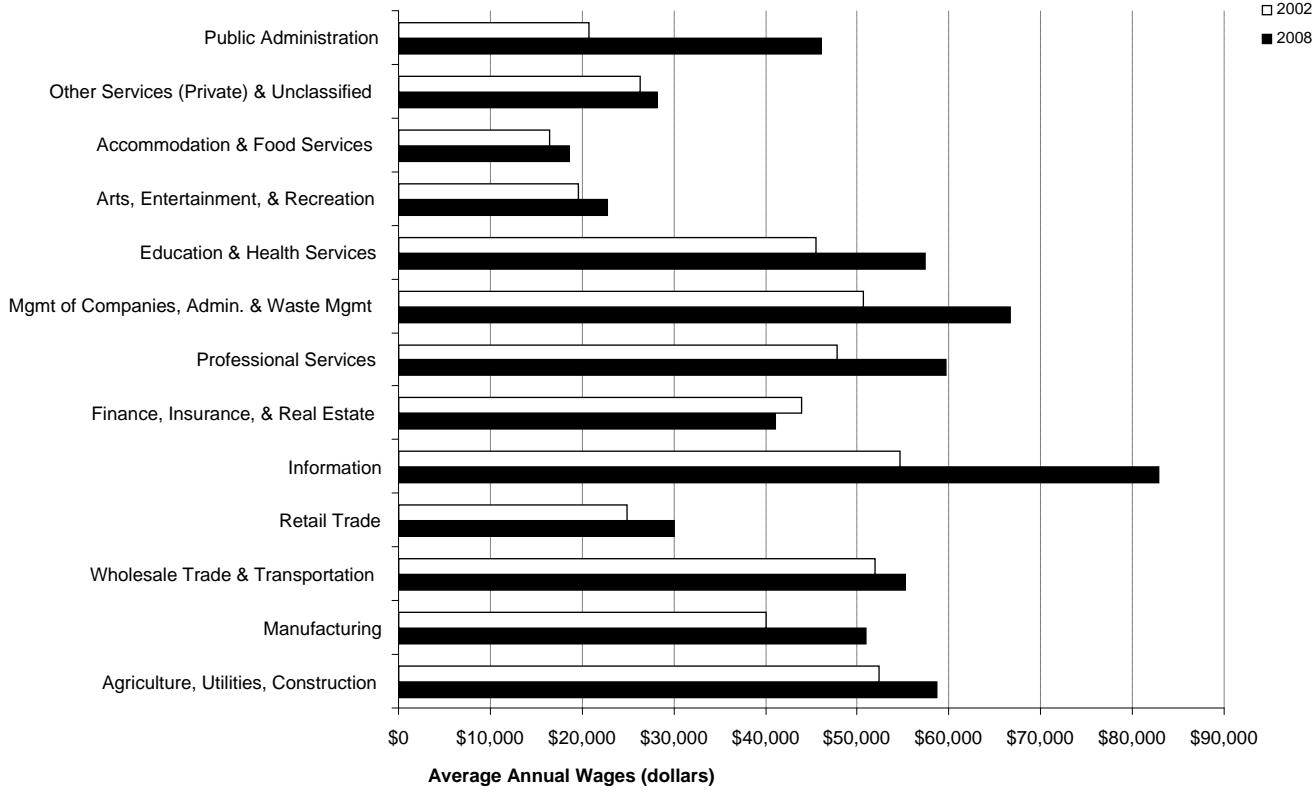
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	<b>2002</b>	<b>2008</b>	<b>change</b>
Total Jobs	20,720	22,409	+1,689
Total Firms	1,485	1,588	+103
Average Annual Wages	\$39,846	\$49,005	+9,159



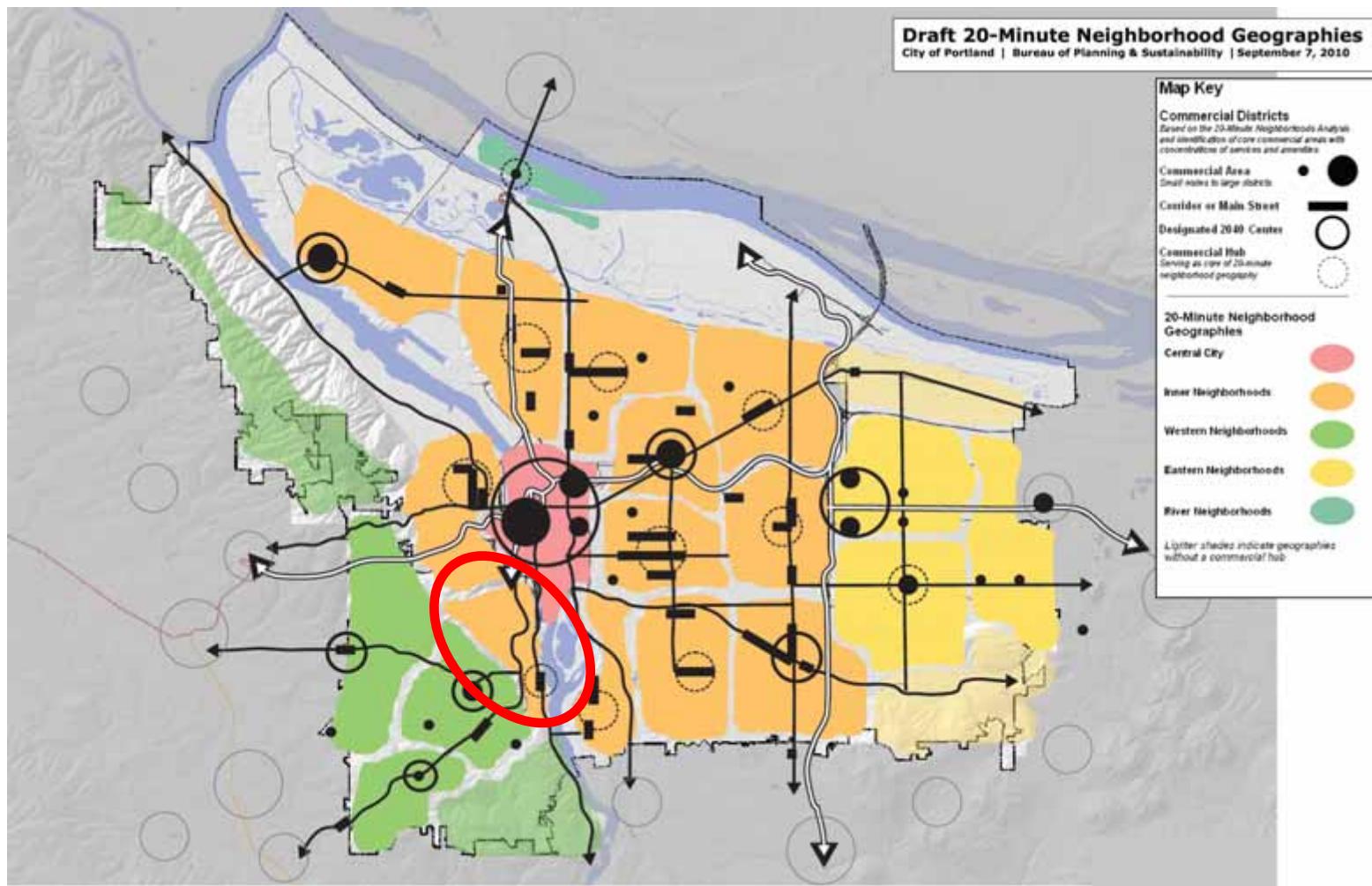
**Total Firms****Average Annual Wages**



## South Portland-Marquam Hill Analysis Area

Including South Portland, Homestead, and Healy Heights neighborhoods, and part of the Southwest Hills Residential League

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# South Portland-Marquam Hill Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 8,400 people (4,600 households)  
Land Area: 2.5 sq. miles (3,400 people per sq. mile)*

The area's primary concentration of commercial services is located along SW Macadam, which includes the Johns Landing shopping area.

**Grocery stores:** 1 (1 store per 4,600 households)

**Retail gap:** \$61 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	61%
Within 1/2 mile of a public elementary school:	0%
Within 3 miles of a full-service community center*:	22%
Within 1/2 mile of a full-service grocery store:	8%
Within 1/4 mile of a frequent service transit stop:	18%

\*Parks Bureau service standard

**Community Centers:** None (Fulton Park Community Center adjacent to southwest edge of analysis area)

**Libraries:** None

**Parks and Open Spaces:** 396 acres – including Council Crest, Duniway, Lair Hill and Willamette parks, Willamette Moorage, and Terwilliger Boulevard Parkway.

**Tree Canopy Coverage:** 56%

**Public Schools:** None

**Colleges (campus):** 2 (Oregon Health & Science University, National College of Naturopathic Medicine)

**Hospitals:** 4 (Oregon Health & Science University, Doernbecher Children's Hospital, Shriners Hospital, and the Veterans Hospital)

**Farmers Markets:** 1 (OHSU Farmers Market)

**Transit Centers/Stations:** None (no light rail stations or TriMet transit centers, but includes upper terminal of the Portland Aerial Tram)

**Walkable Access Score:** 31 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** South Portland, Homestead, and Healy Heights, and part of the Southwest Hills Residential League

**Business Associations:** South Portland Business Association

## Urban Form Characteristics

This area includes two distinct geographies: the flats with their compact grid of streets, originally developed during the Streetcar Era with a continuous system of sidewalks, and hillside areas often featuring curvilinear streets following topography. Prominent hillside features include forested slopes and ravines, the Terwilliger Parkway, and the OHSU hospital complex. Macadam Avenue is the primary commercial corridor in the flats, which are bordered by the Central City to the northeast and by the Willamette River.

**Access issues.** The area's flats feature good street and sidewalk connectivity, but the heights lack street connectivity and accessibility is limited by topography. Public stairways and off-street trails provide additional pedestrian connections in some hillside areas. The flats have fairly good access to commercial services, but most residents are not within a walkable distance of frequent service transit. Adjacency to the Central City provides good access to jobs, services and cultural amenities. The I-5 and I-405 freeways, Barbur Boulevard and the Ross Island Bridge approaches serve as barriers to pedestrian access.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	.8 mile (Macadam)
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	453	40%	126
Multi-Family Residential:	188	17%	46
Commercial/Mixed-Use:	231	20%	137
Employment:	2	.1%	1
Industrial:	0	0%	0
Open Space:	259	23%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

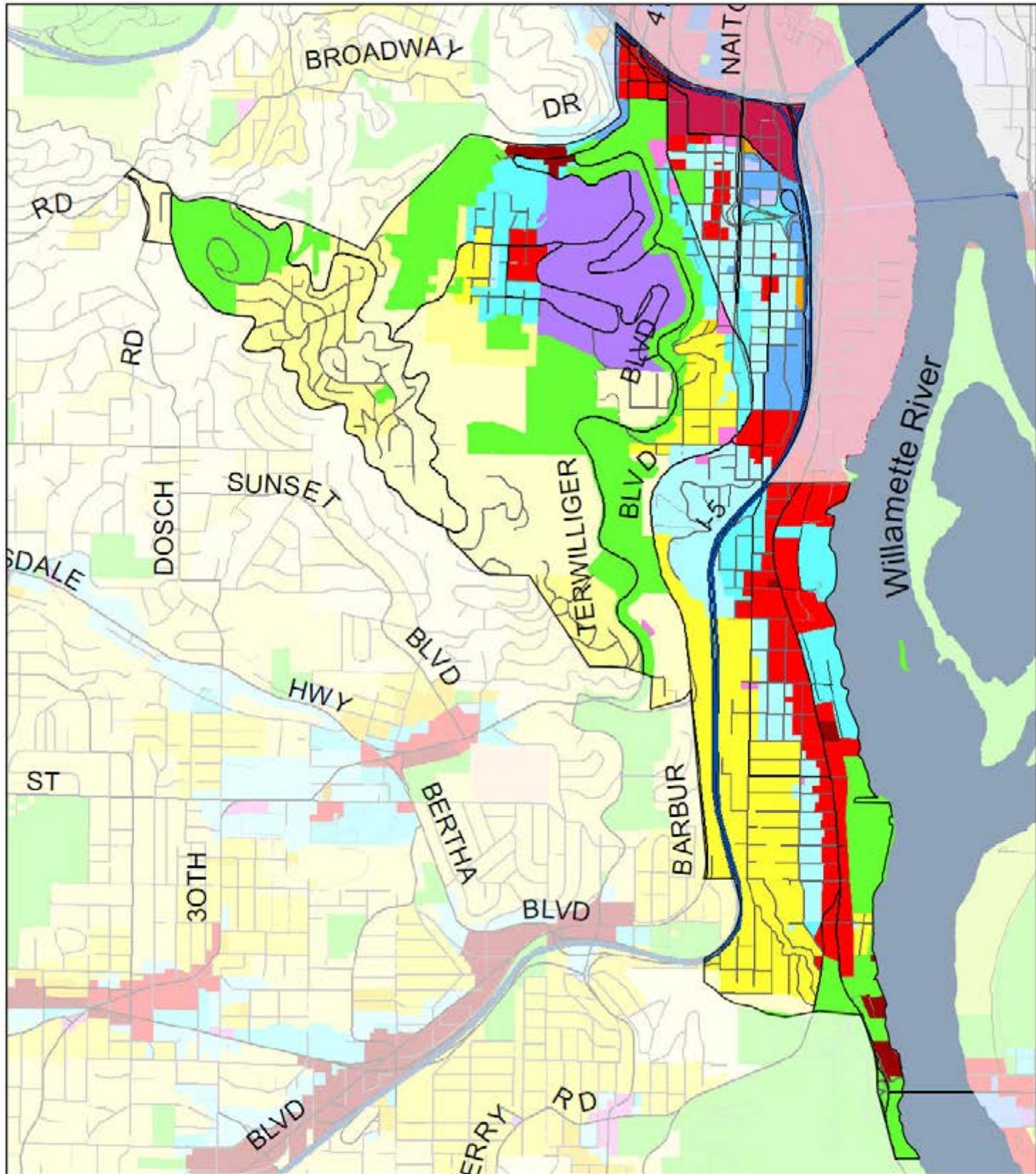
2010 Housing Units (Census):	4,668
2035 Housing Units:	7,600

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# South Portland-Marquam Hill Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet

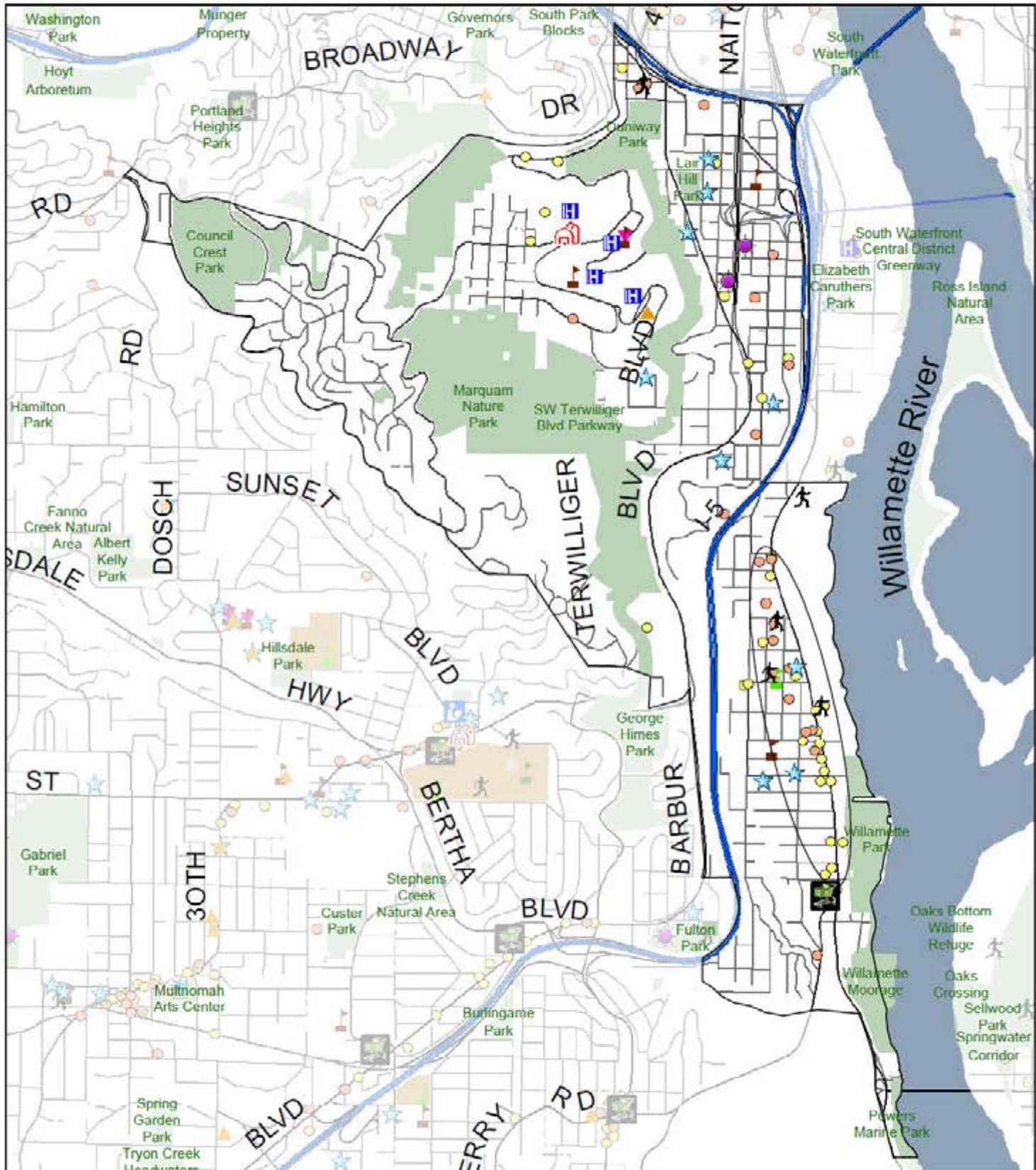


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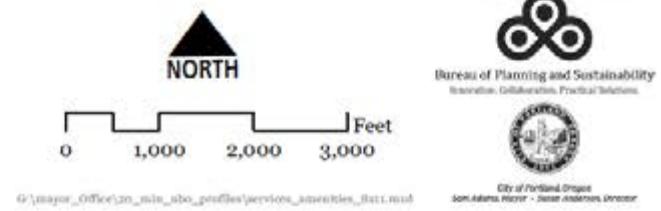
# South Portland-Marquam Hill Analysis Area



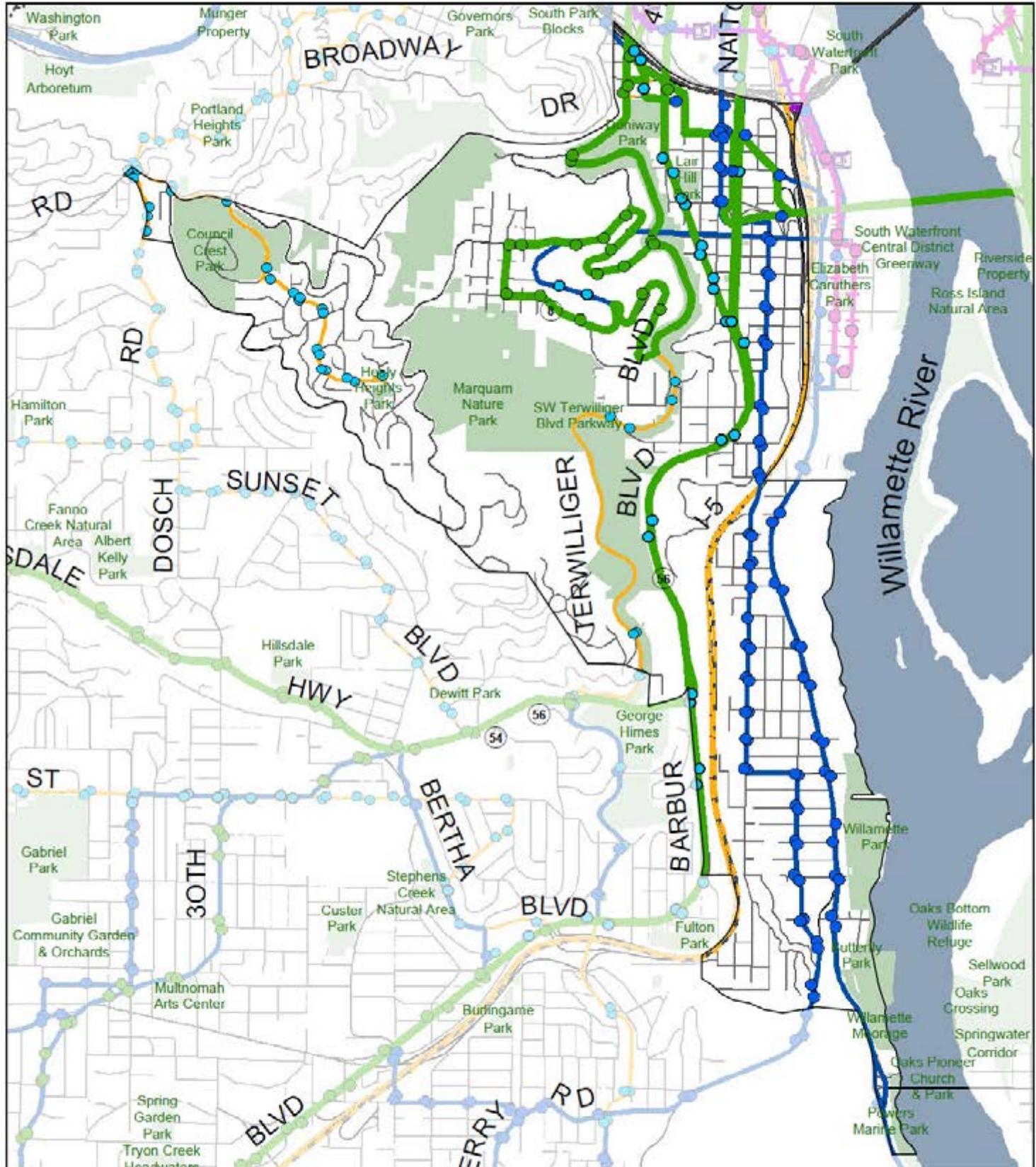
## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- Places of Worship
- Farmers Markets
- Community Gardens
- County Health Clinic
- County Aging Services
- Libraries
- Preschools
- Daycare Centers
- Public HS
- Public K-8
- Community Centers
- Private Schools



# South Portland-Marquam Hill Analysis Area



## Transit Infrastructure

August 9, 2011

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- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary



0 1,000 2,000 3,000 Feet

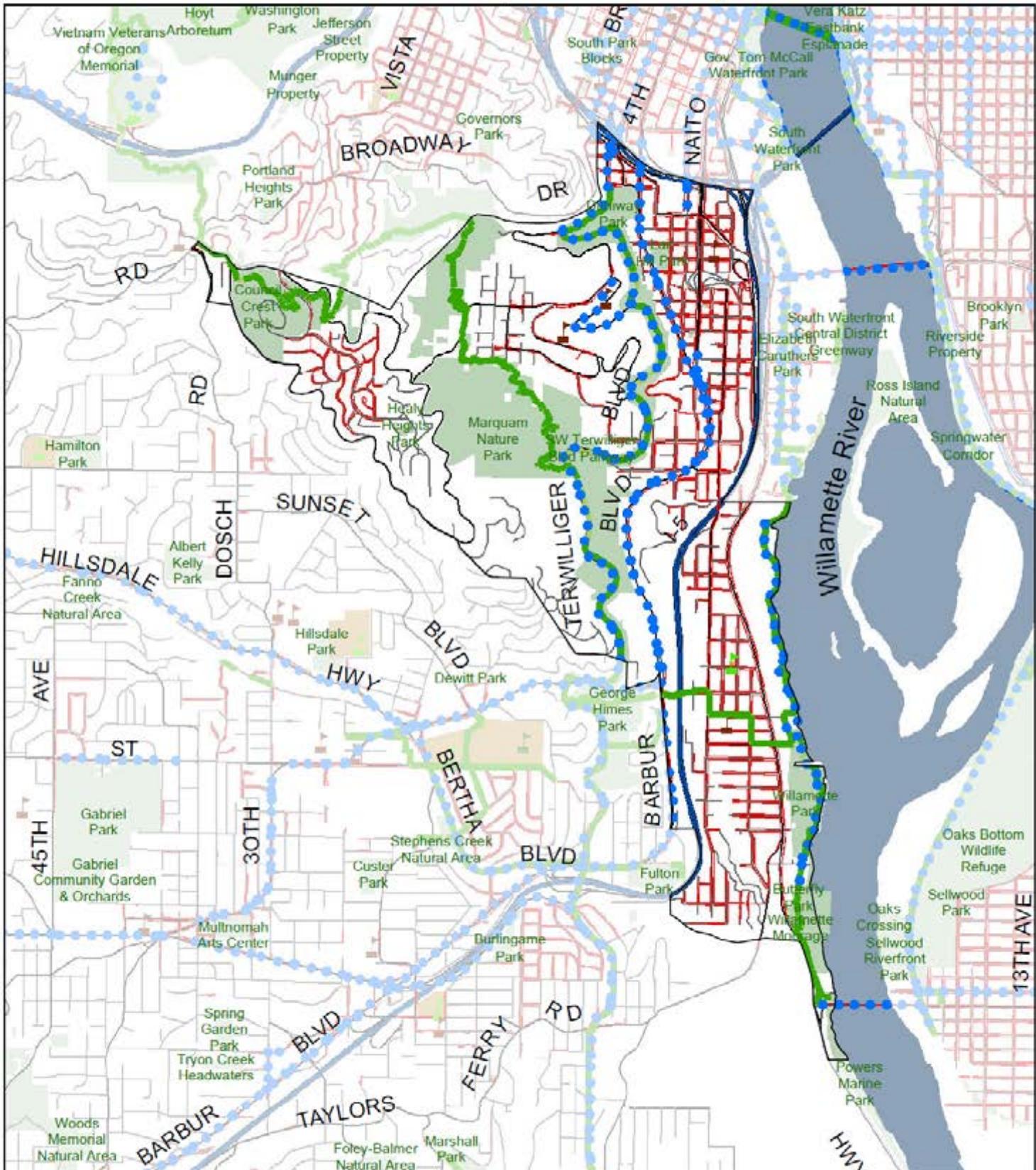


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# South Portland-Marquam Hill Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet

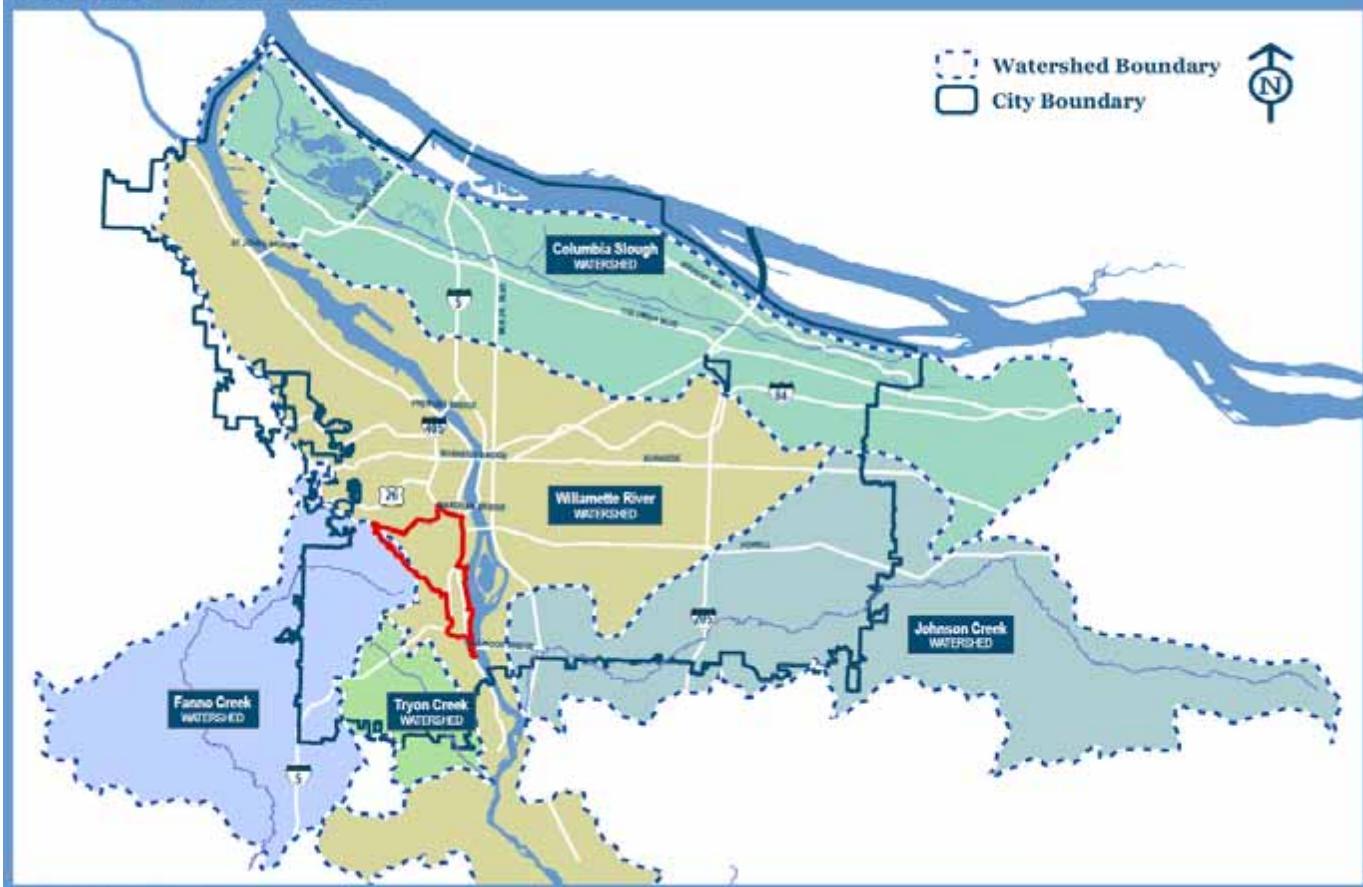


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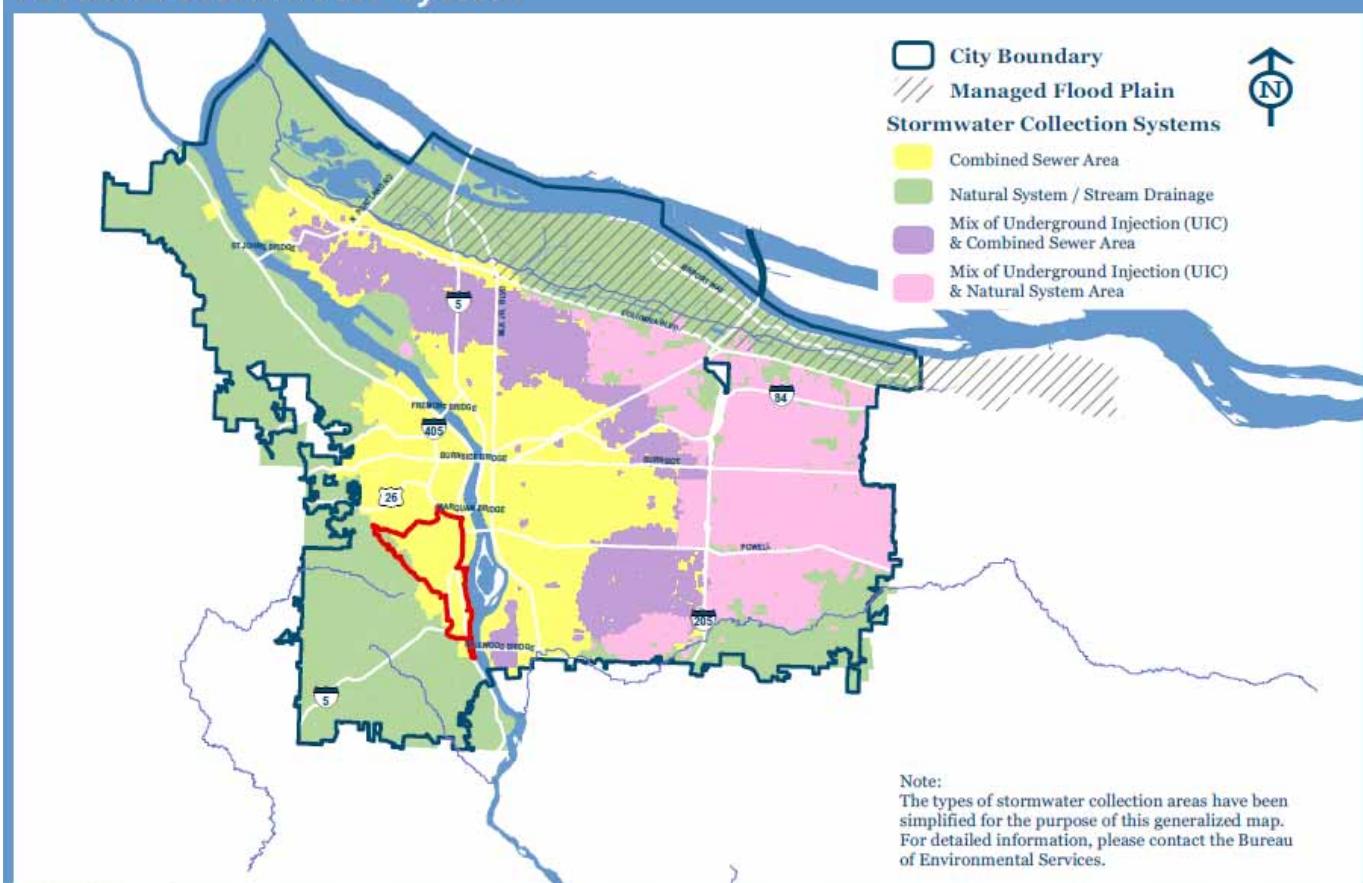


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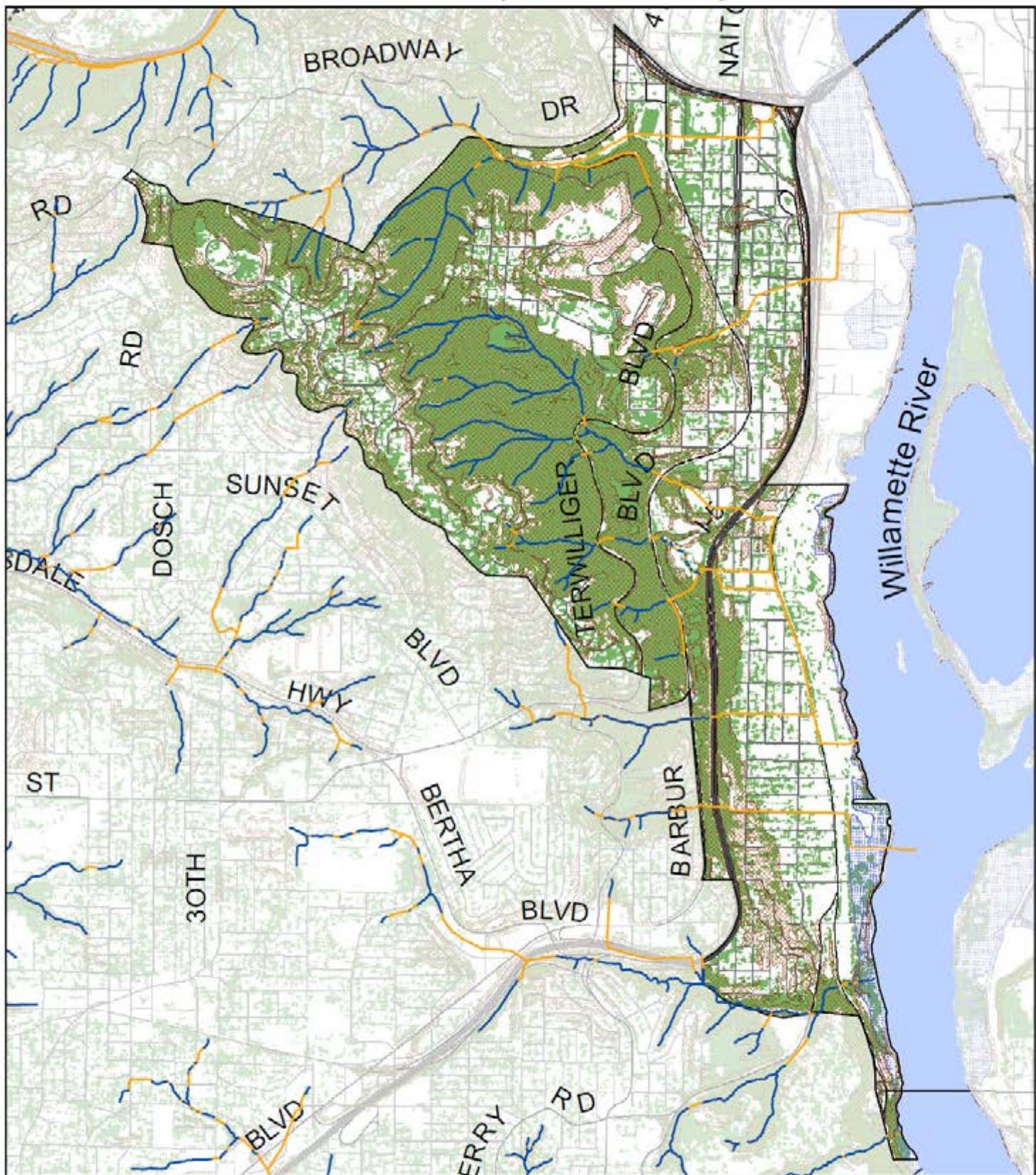
## Portland Watersheds



## Portland Stormwater System



# South Portland-Marquam Hill Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



# South Portland-Marquam Hill Analysis Area

## Demographics (2000 – 2010)

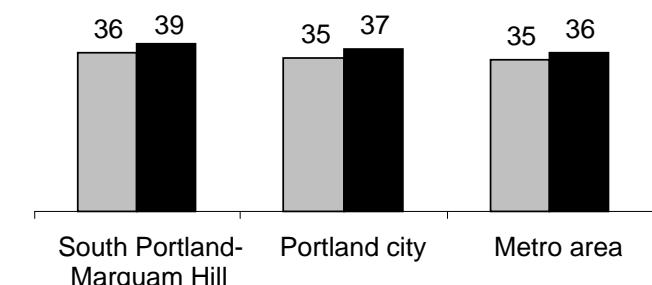
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

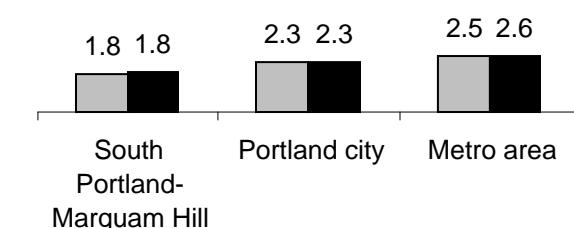
	South Portland- Marquam Hill	Portland city	Metro area
2010	8,367	583,776	2,226,009
2000	8,136	529,121	1,927,881
% change	3%	10%	15%

 2000     2010

### Median Age

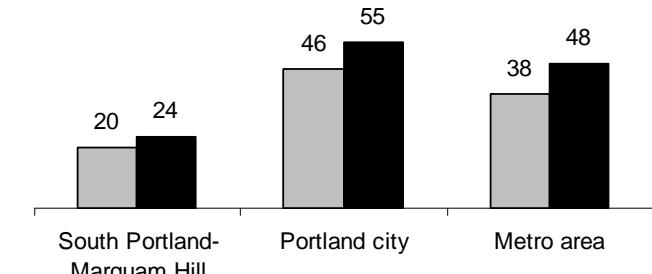


### Average Household Size

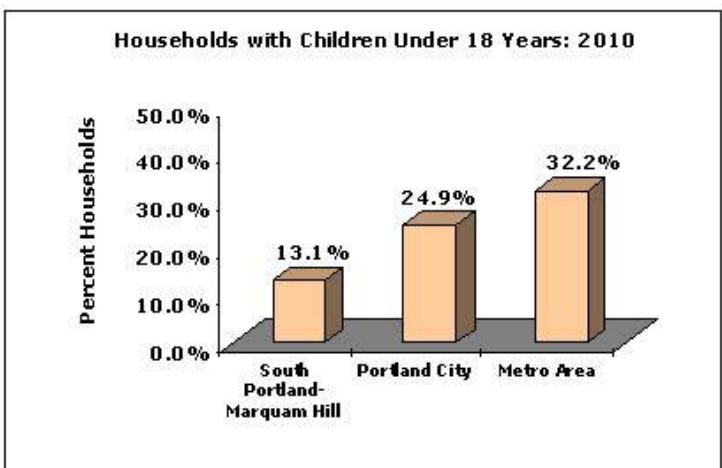
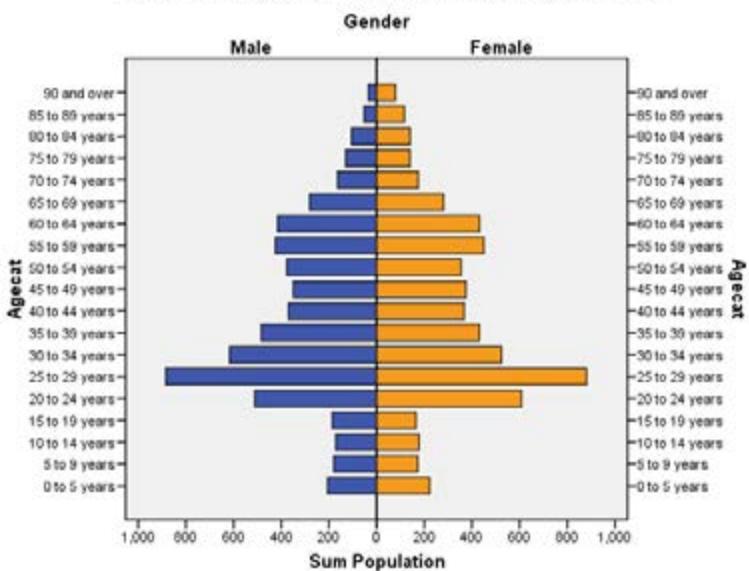


### Diversity Index

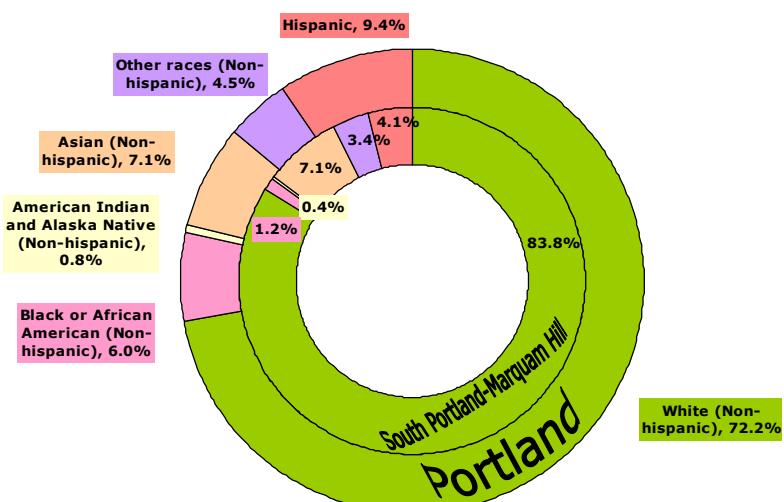
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



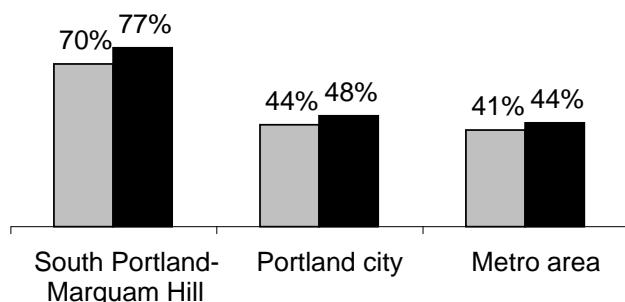
Population Pyramid for South Portland-Marquam Hill, 2010



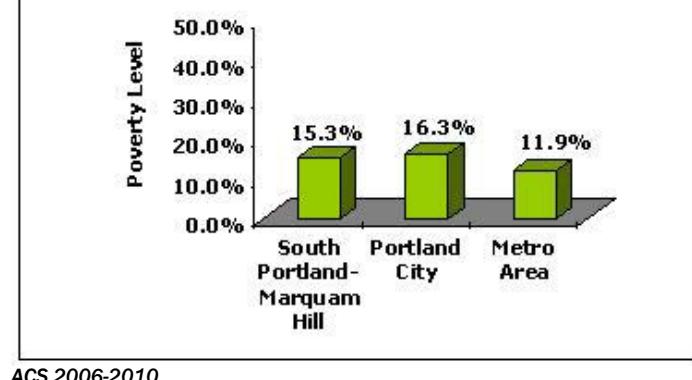
Racial and Ethnic Distribution in Portland vs. South Portland-Marquam Hill



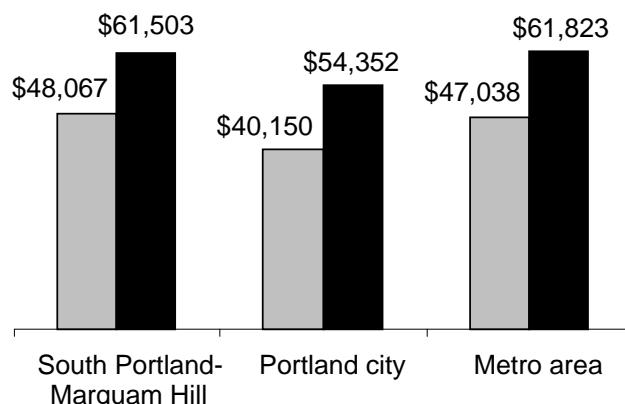
## Percent College Graduates



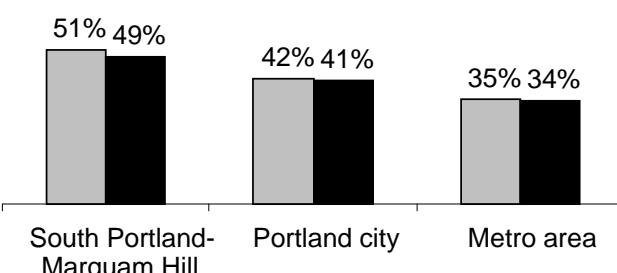
## Percent Below Poverty: 2010



## Median Household Income



## Percent Renters of Occupied Housing Units



## Median Home Value

	South Portland- Marquam Hill	Portland city	Metro area
2010	\$429,056	\$253,184	\$273,500
2000	\$247,132	\$154,721	\$168,347
% change	73.6%	63.6%	62.5%

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010

Source: COSTAR

### RETAIL

#### RETAIL

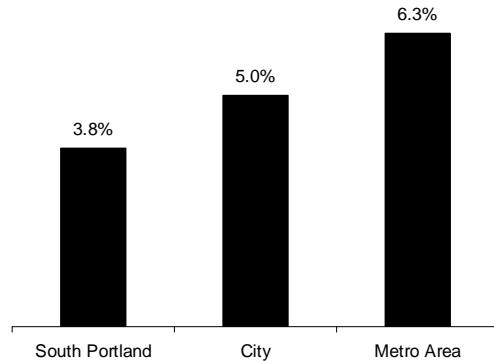
##### Square Feet

So. Portland	City	Metro Area
574,840	51,937,895	107,875,146

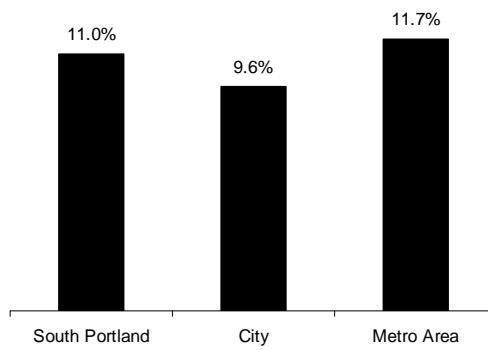
##### Square Feet

So. Portland	City	Metro Area
1,941,755	54,348,765	92,465,455

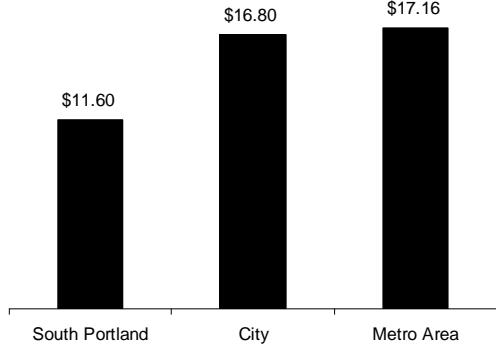
##### Retail Vacancy



##### Office Vacancy



##### Retail Rents



##### Office Rents



### OFFICE SPACE

# South Portland-Marquam Hill Analysis Area

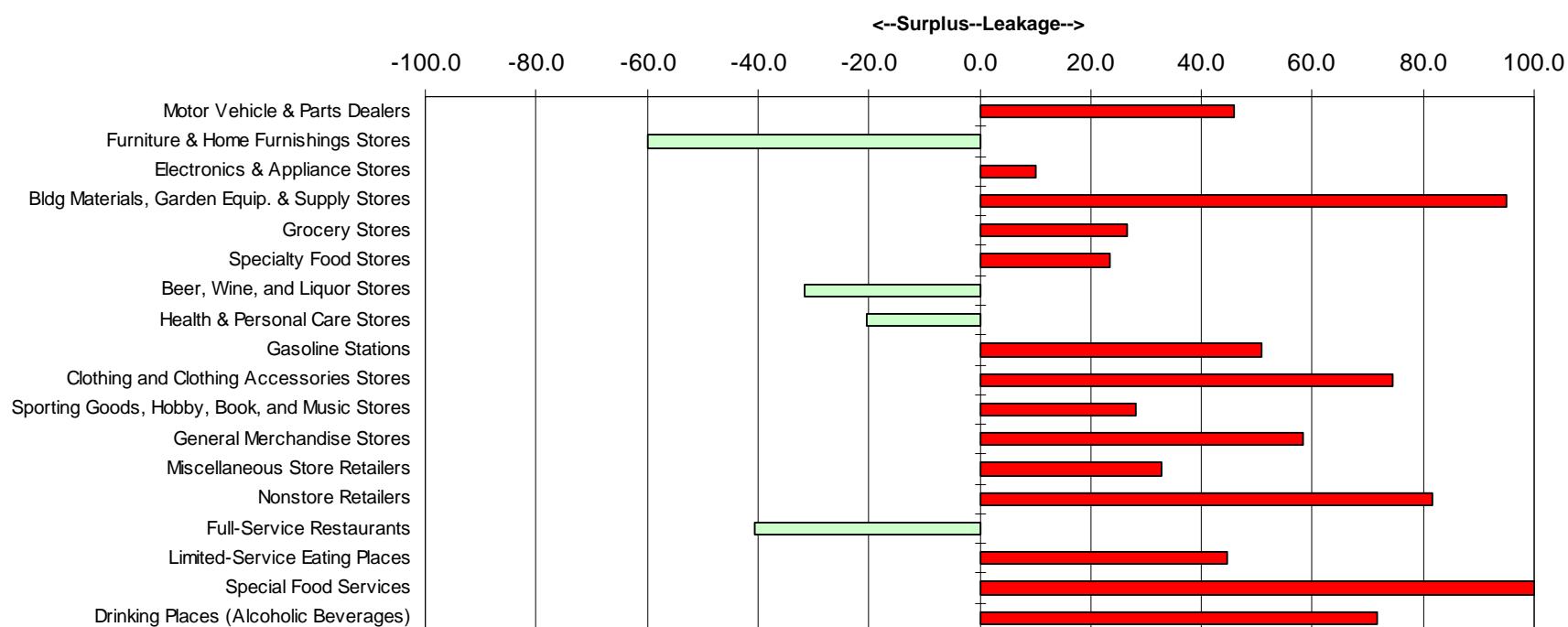
## Retail Market Profile

**Retail Gap = \$61 million**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$157,678,732	\$96,387,165	<b>\$61,291,567</b>	<b>24.1</b>	119
Total Retail Trade (NAICS 44-45)	\$133,926,797	\$74,038,281	<b>\$59,888,516</b>	<b>28.8</b>	76
Total Food & Drink (NAICS 722)	\$23,751,935	\$22,348,884	<b>\$1,403,051</b>	<b>3.0</b>	43

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# South Portland-Marquam Hill Analysis Area

## Employment

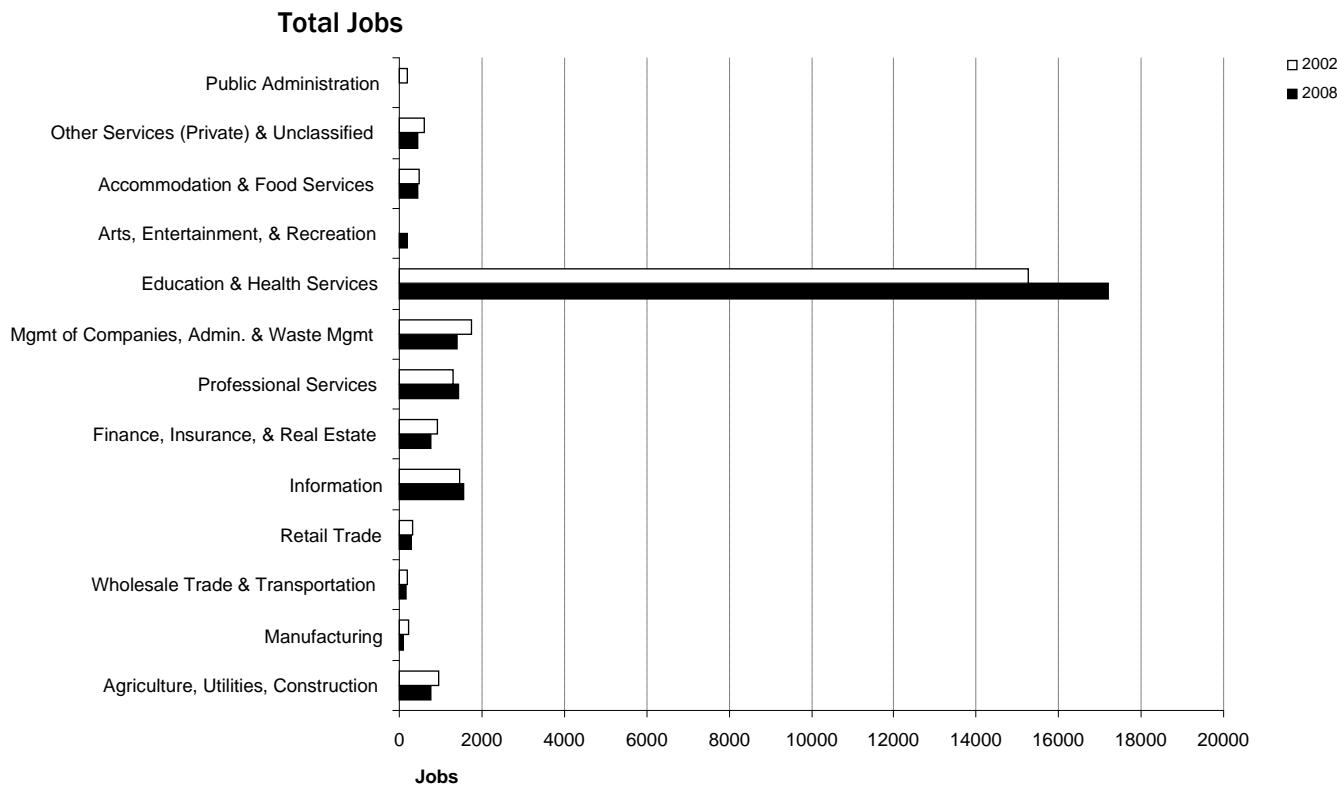
Quarterly Census of Employment and Wages data for 2002 & 2008

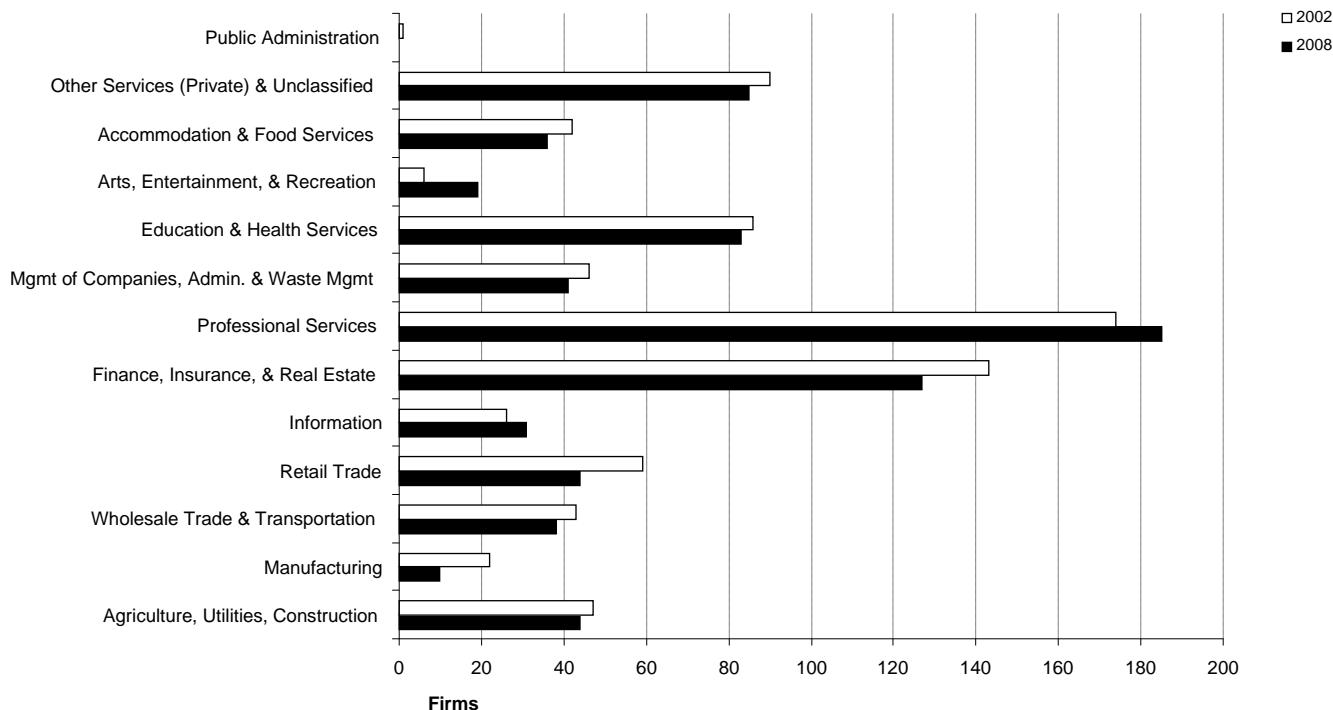
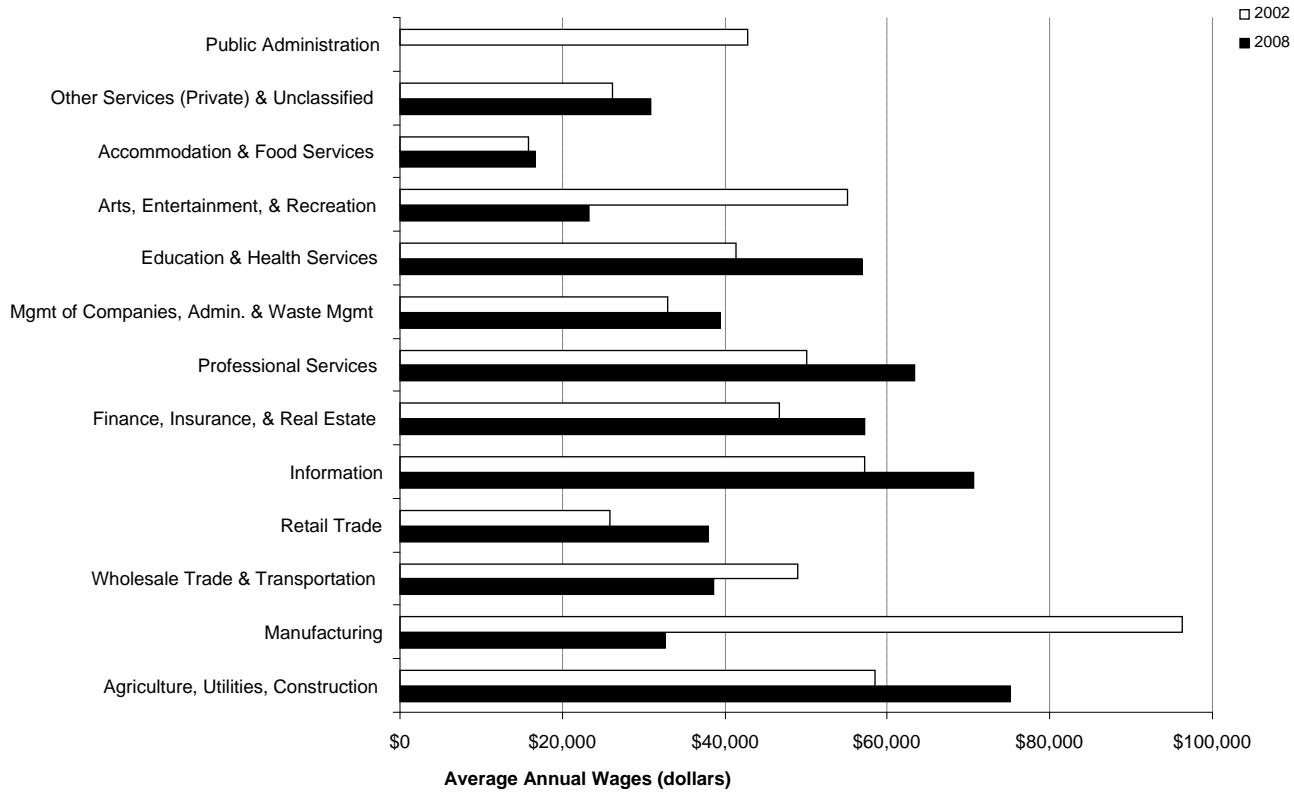
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	23,661	24,758	+1,094
Total Firms	785	743	- 42
Average Annual Wages	\$42,584	\$56,058	+13,474



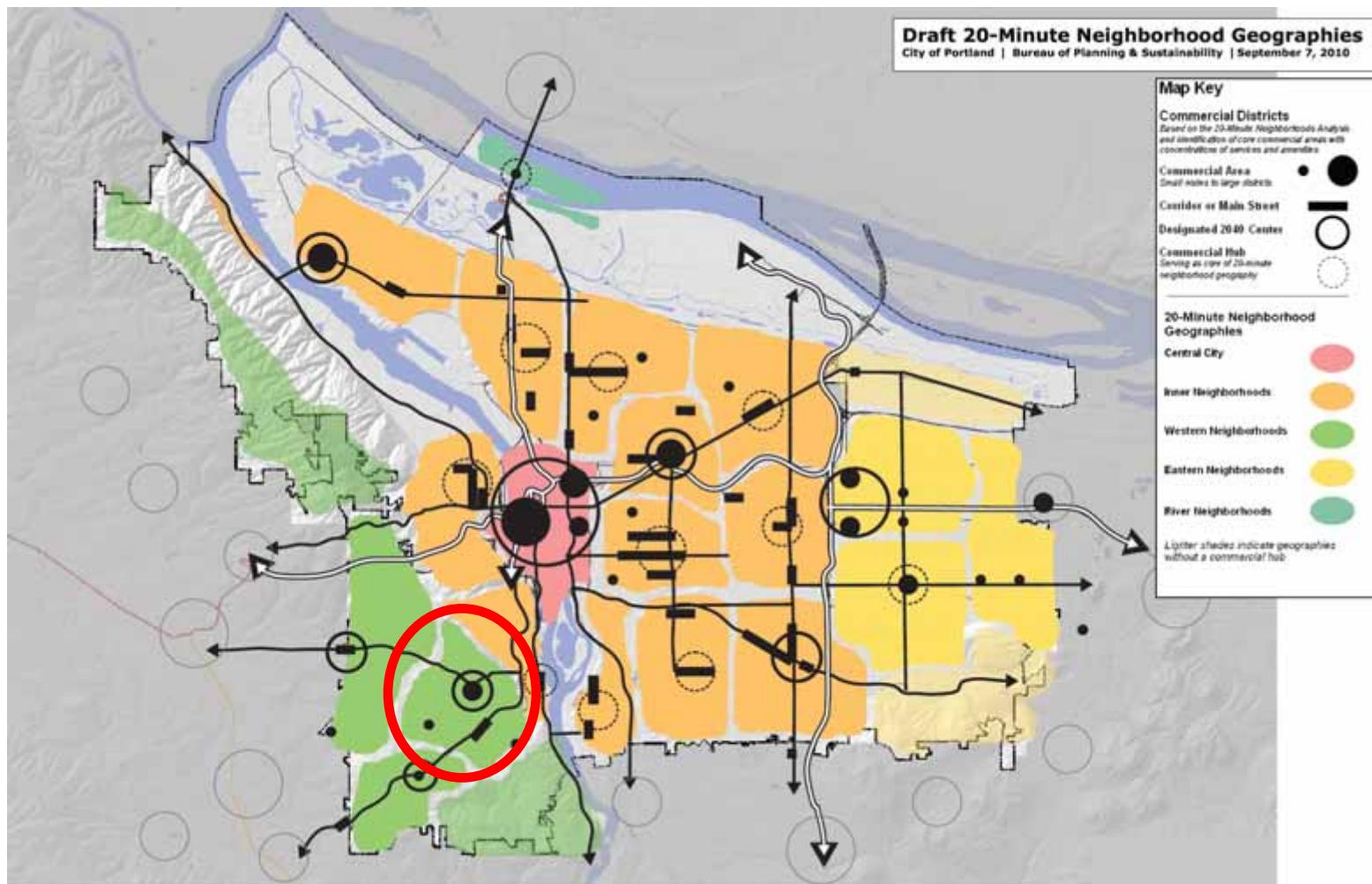
**Total Firms****Average Annual Wages**



## Hillsdale-Multnomah-Barbur Analysis Area

Including Hillsdale, Multnomah, South Burlington, and parts of the Markham and Marshall Park neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Hillsdale-Multnomah-Barbur Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 19,800 people (9,100 households)  
Land Area: 4.3 sq. miles (4,600 people per sq. mile)*

The area's largest concentrations of commercial services are found in the Hillsdale town center and in Multnomah Village. Other services, including supermarkets, are dispersed along SW Barbur, and a small clustering of commercial services is located at SW Terwilliger and Taylors Ferry.

**Grocery stores:** 4 (1 store per 2,275 households)

**Retail gap:** \$128 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

## Community Amenities

### Proximity to Services and Amenities

#### Percentage of population:

Within 1/2 mile of a park*:	77%
Within 1/2 mile of a public elementary school:	17%
Within 3 miles of a full-service community center*:	100%
Within 1/2 mile of a full-service grocery store:	21%
Within 1/4 mile of a frequent service transit stop:	5%

\*Parks Bureau service standard

**Community Centers:** 3 (Southwest Community Center and Pool [full service], Multnomah Arts Center, Fulton Park Community Center)

**Libraries:** 1 (Hillsdale Library)

**Parks and Open Spaces:** 192 acres – including Gabriel, George Himes, Custer, Burlingame, Fulton, Spring Garden, and Marshall parks; and the Stephens Creek and Foley-Balmer natural areas.

**Tree Canopy Coverage:** 40%

**Public Schools:** 1 high school (Wilson)

4 K-8 schools (Rieke, Capitol Hill, and Maplewood\* elementary schools, Gray Middle School)

\*At edge of analysis area

**Colleges** (campus): None

**Hospitals:** None

**Farmers Markets:** 1 (Hillsdale Farmers Market)

**Transit Centers/Stations:** None

**Walkable Access Score:** 40 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

## Neighborhood and Business Associations

**Neighborhood Associations:** Hillsdale, Multnomah, South Burlington, and parts of Markham and Marshall Park

**Business Associations:** Hillsdale Business and Professional Association, Multnomah Village Business Association

## Urban Form Characteristics

Natural features are prominent characteristics of this area, including gently-rolling hills, forested slopes, and occasional streams and ravines. The area is primarily composed of residential neighborhoods, which include a mix of rectilinear blocks and curvilinear streets that follow the area's hilly topography. Most streets do not have sidewalks. The area includes a small number of commercial areas, including Multnomah Village, with its Streetcar Era storefront buildings, and more auto-oriented commercial areas in Hillsdale and along Barbur Boulevard.

**Access issues.** Most of the area lacks good street connectivity and most streets do not have sidewalks. Off-street trails provide additional pedestrian connections in some locations. The limited number of commercial areas are beyond walking distance for most residents, and some of these areas have few options for access from nearby residential areas other than major roads that lack continuous pedestrian facilities. The area has relatively low population densities and most residents do not have walkable access to frequent service transit. Topography and other natural features also limit pedestrian and bicycle accessibility in the area.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Hillsdale Town Center:	272 acres
Main Streets:	.8 mile (Multnomah Blvd & Capitol Hwy [Multnomah Village])
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,532	74%	299
Multi-Family Residential:	227	11%	52
Commercial/Mixed-Use:	110	5%	57
Employment:	0	0%	0
Industrial:	0	0%	0
Open Space:	208	10%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

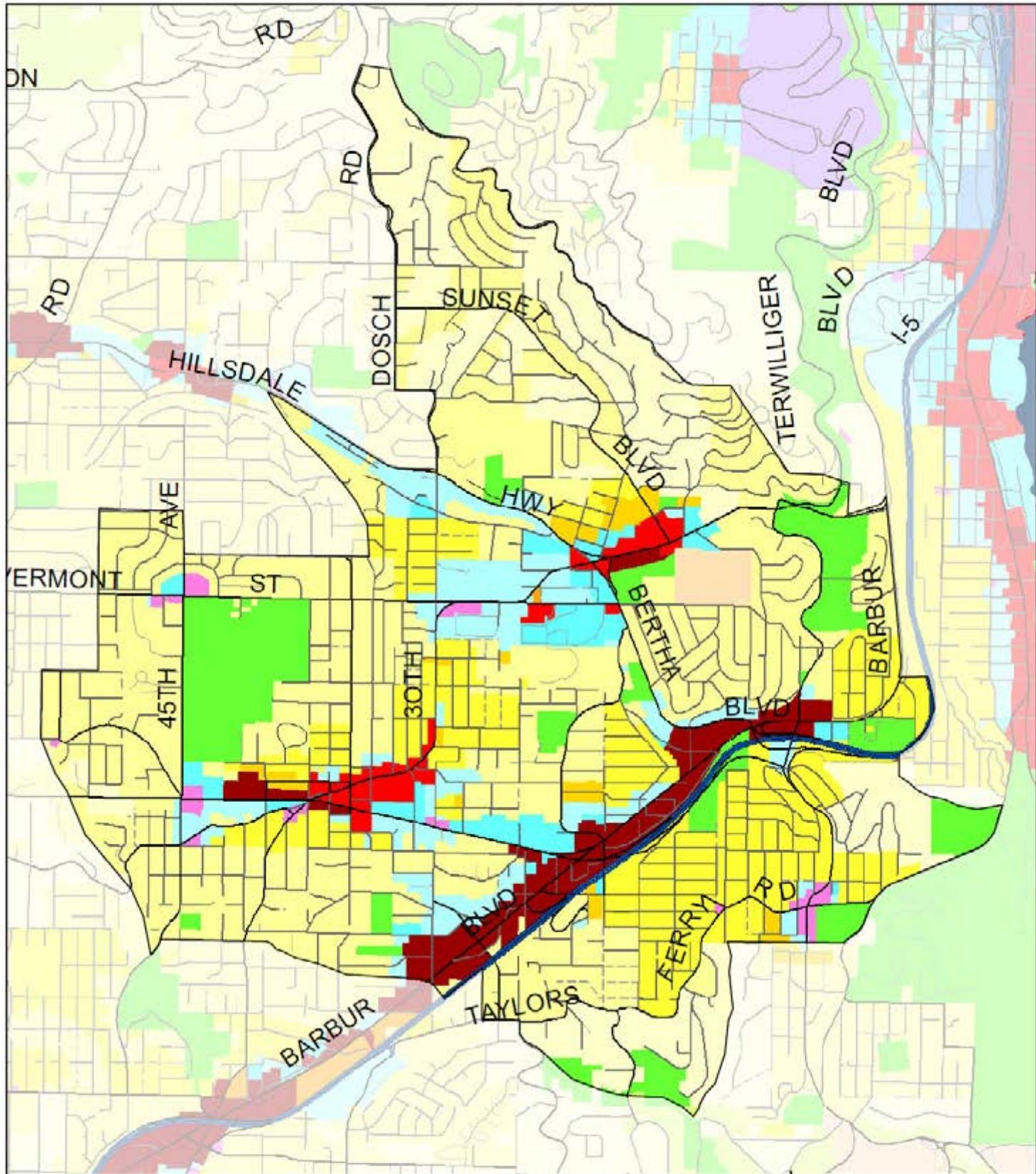
2010 Housing Units (Census):	9,066
2035 Housing Units:	12,900

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Hillsdale-Multnomah-Barbur Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



0 1,000 2,000 3,000  
Feet

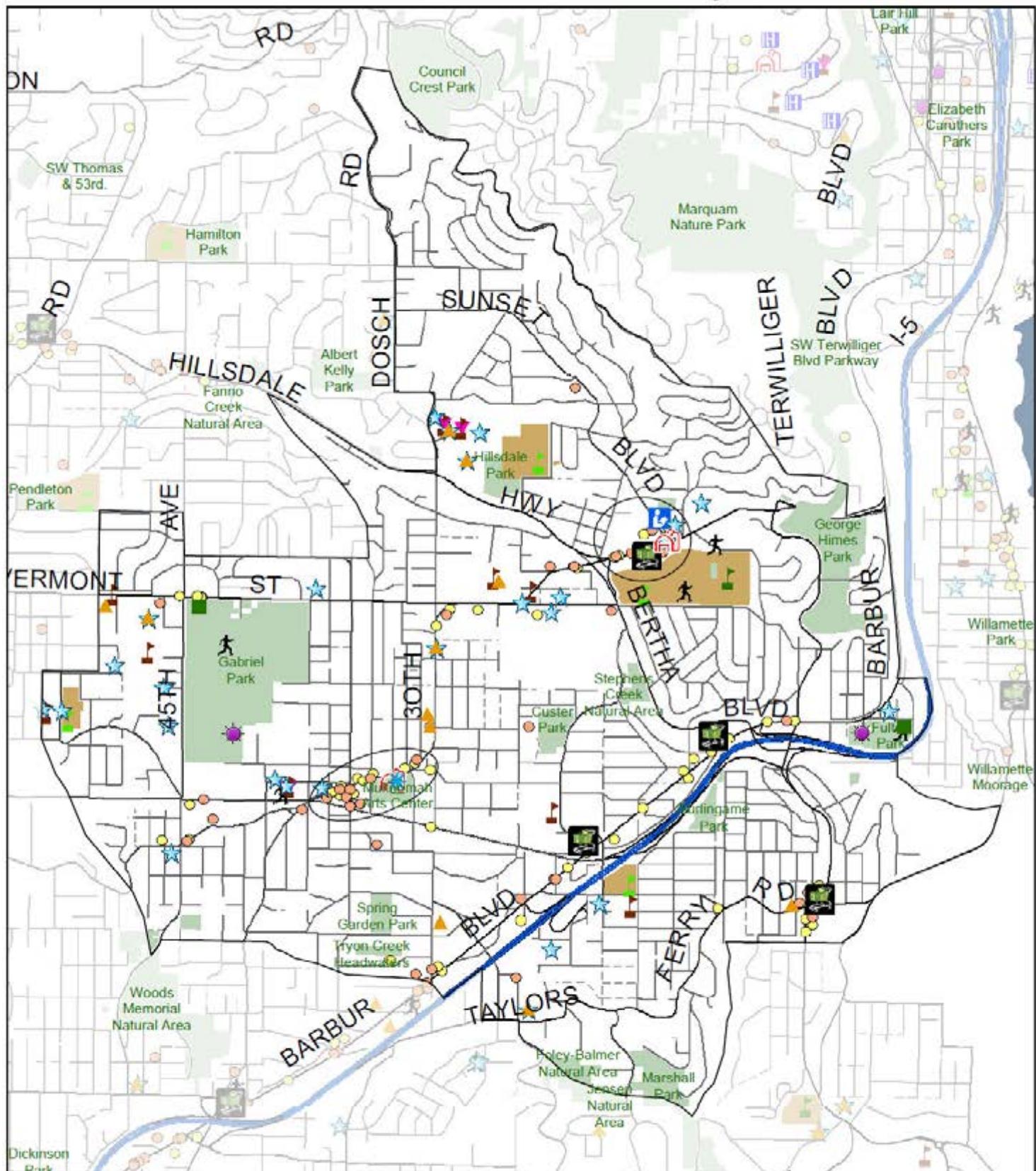


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City of Portland, Oregon  
Sam Adams, Mayor - Susan Anderson, Director

# Hillsdale-Multnomah-Barbur Analysis Area



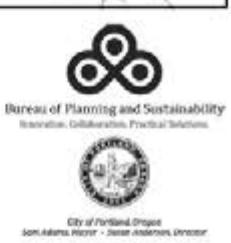
## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

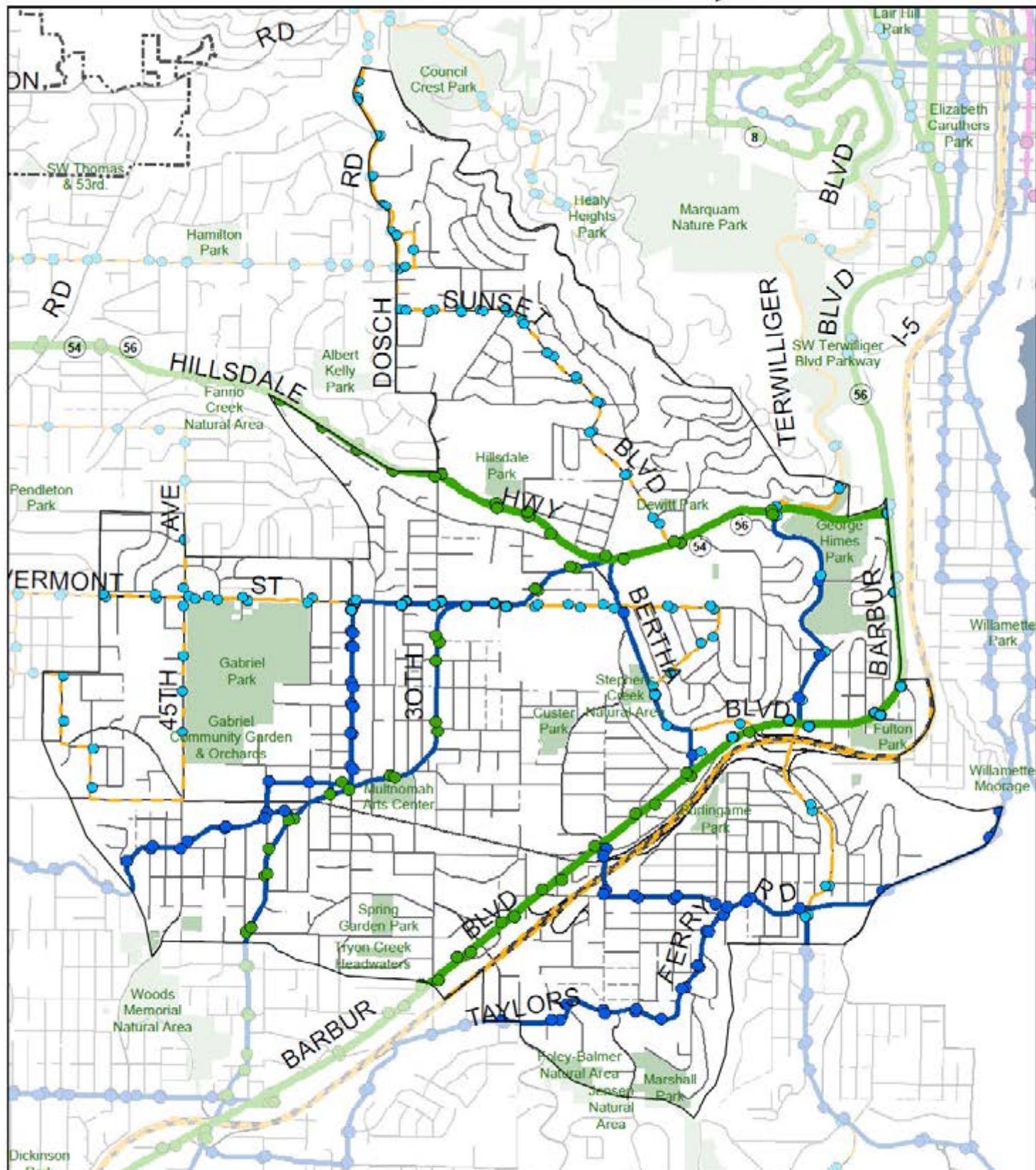
- Type 1 Commercial
- Type 2 Commercial
- Commercial Cluster
- Fitness Centers
- Grocery Stores
- ★ Places of Worship
- Farmers Markets
- Community Gardens
- County Health Clinic
- County Aging Services
- Libraries
- Preschools
- ▲ Daycare Centers
- Public HS
- Public K-8
- Community Centers
- Private Schools



0 1,000 2,000 3,000 Feet



# Hillsdale-Multnomah-Barbur Analysis Area



## Transit Infrastructure

August 9, 2011

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- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary



0 1,000 2,000 3,000 Feet

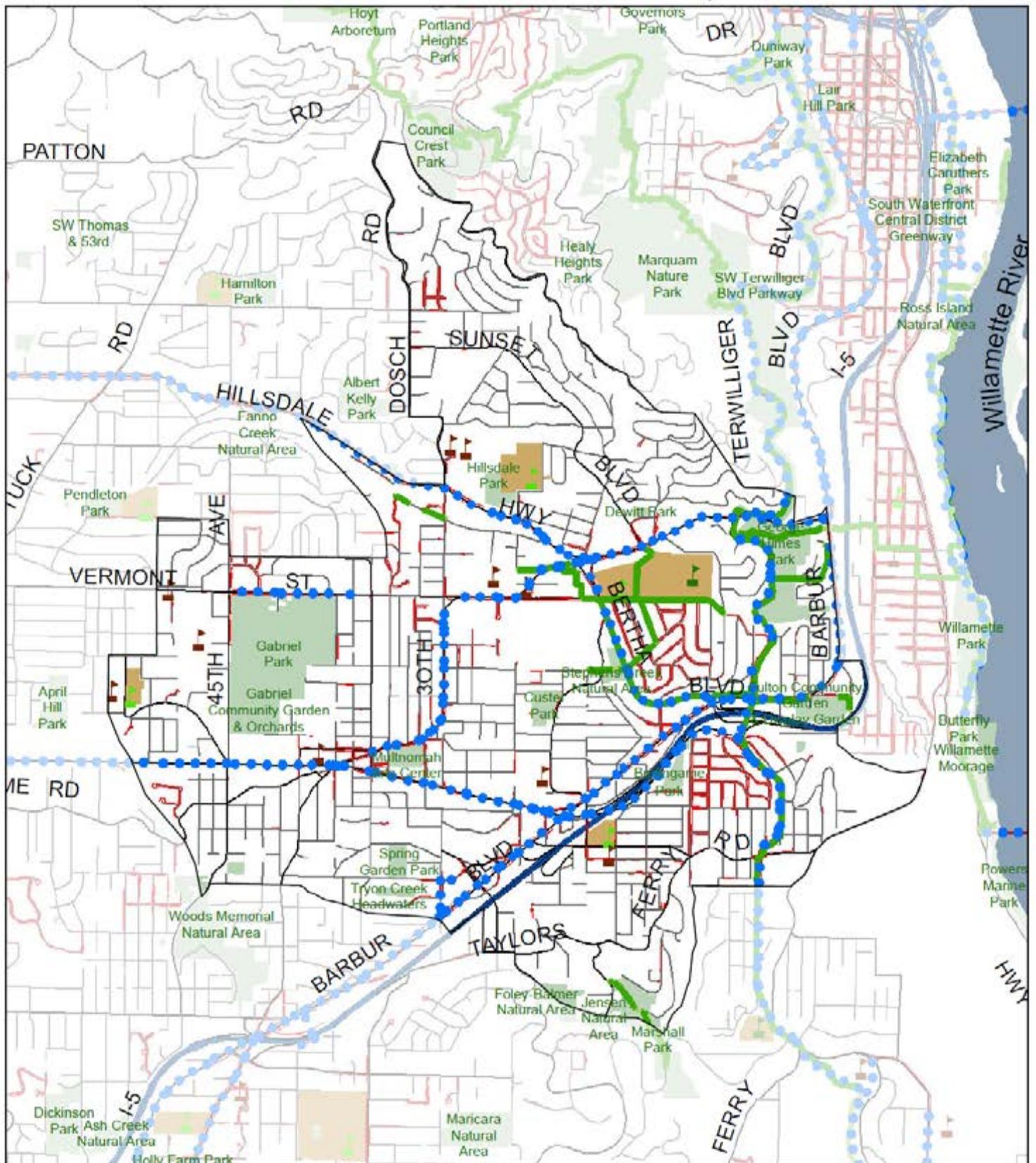


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City of Portland, Oregon  
John Adams, Mayor • Jason Anderson, Director

# Hillsdale-Multnomah-Barbur Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools



0 1,000 2,000 3,000 Feet

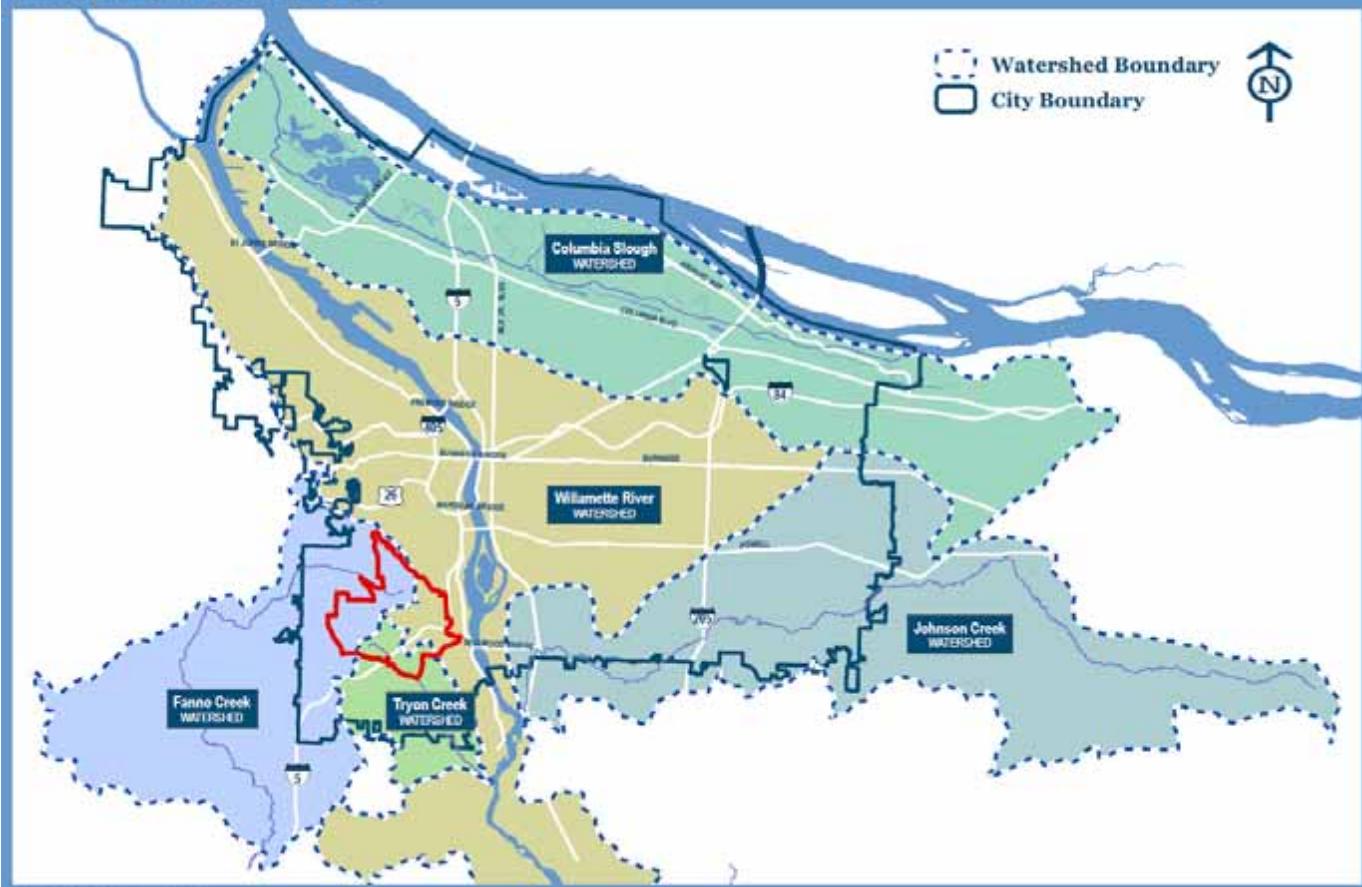


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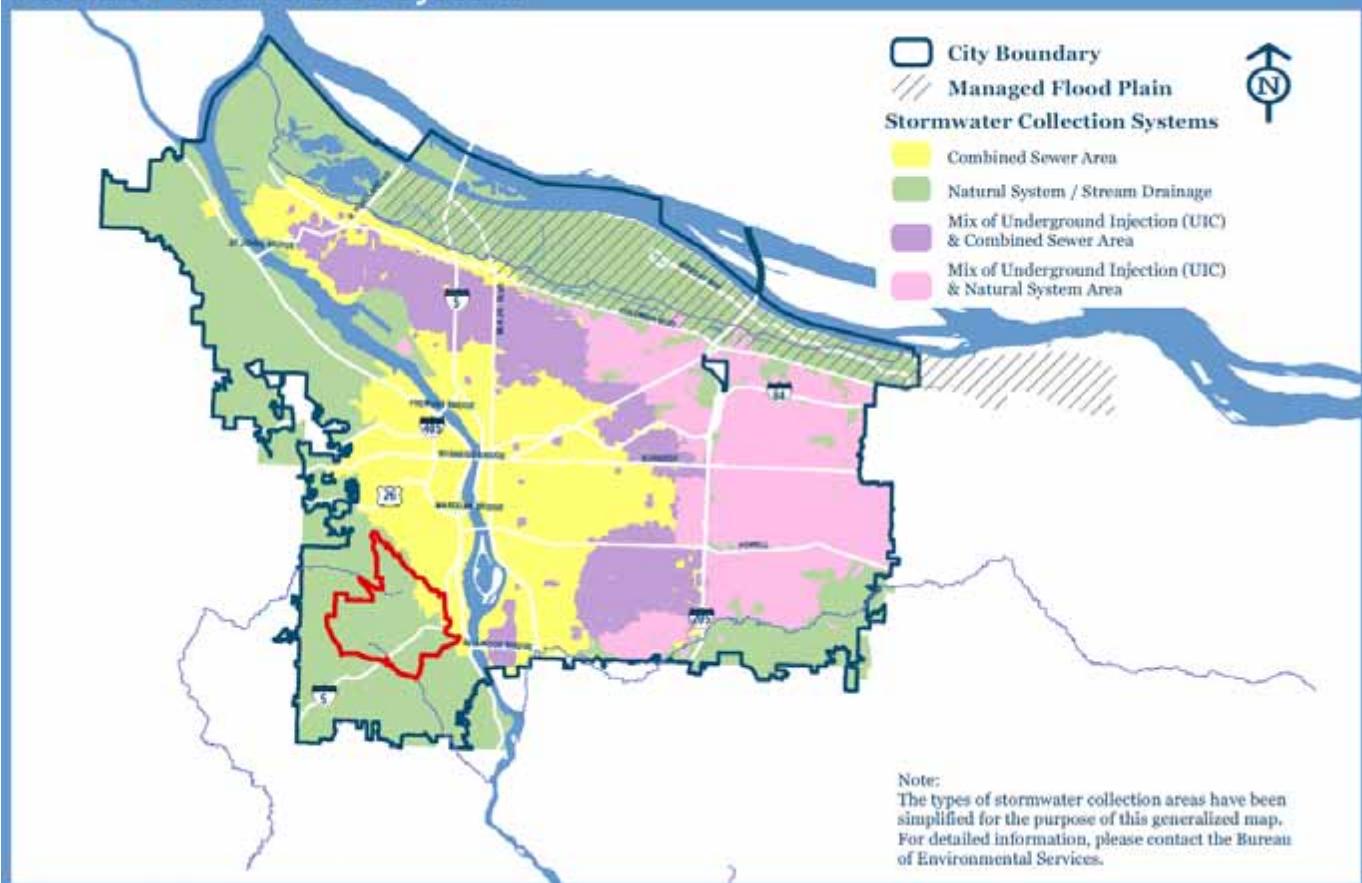


City of Portland-Oregon  
Sam Adams Mayor - Sarah Anderson, Director

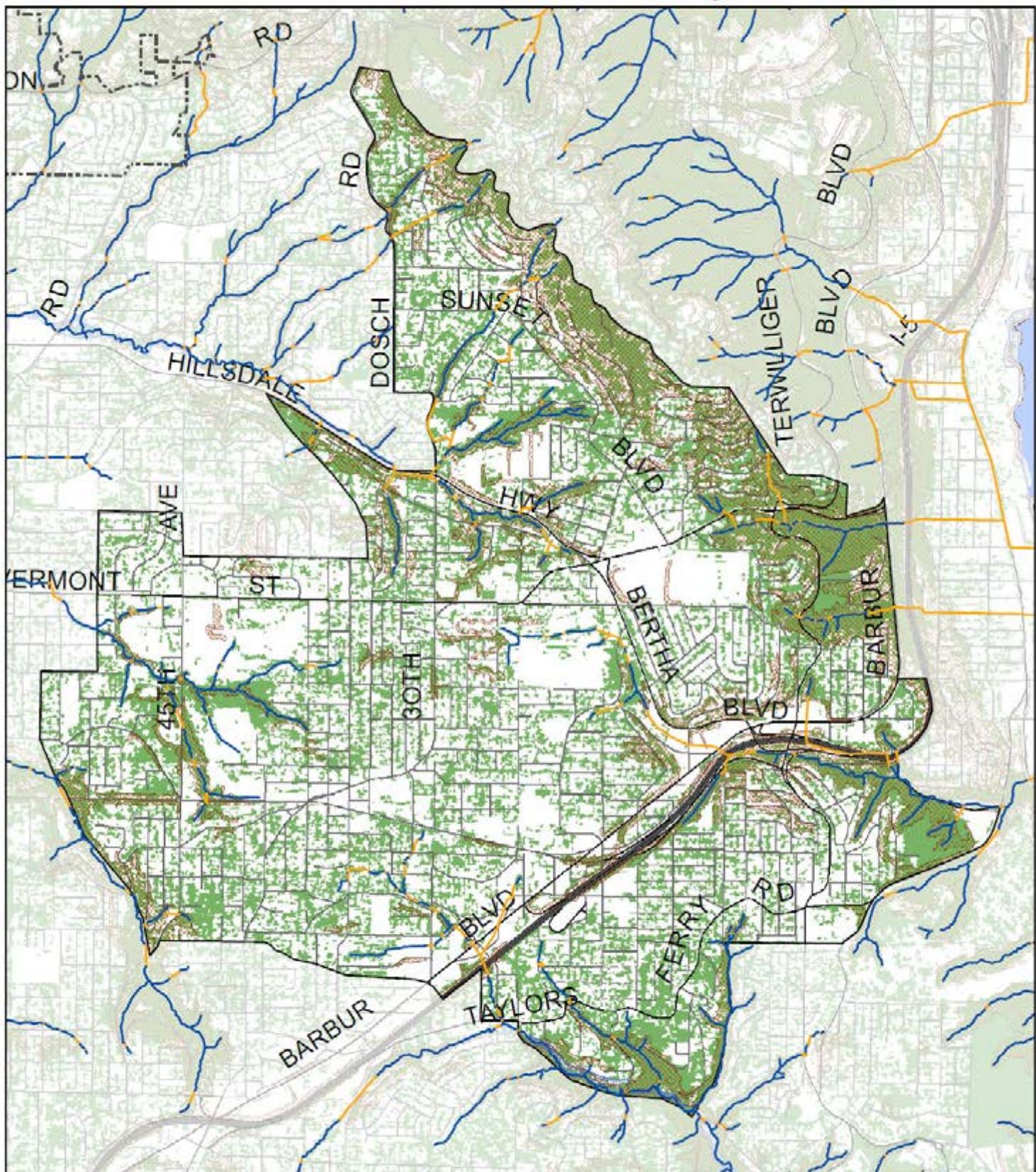
## Portland Watersheds



## Portland Stormwater System



# Hillsdale-Multnomah-Barbur Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000 Feet



# Hillsdale-Multnomah-Barbur Analysis Area

## Demographics (2000 – 2010)

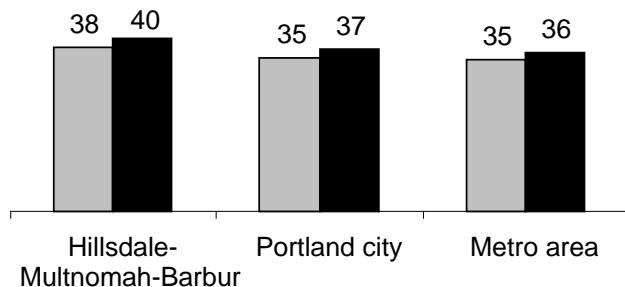
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

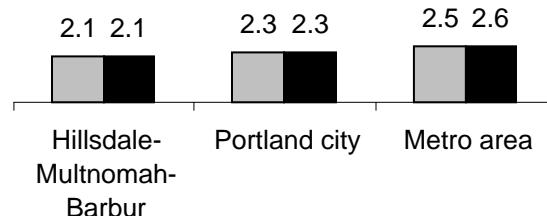
	Hillsdale-Multnomah-Barbur	Portland city	Metro area
2010	19,795	583,776	2,226,009
2000	18,674	529,121	1,927,881
% change	6%	10%	15%

■ 2000 ■ 2010

### Median Age

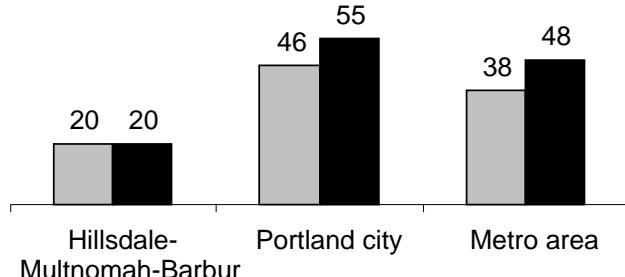


### Average Household Size

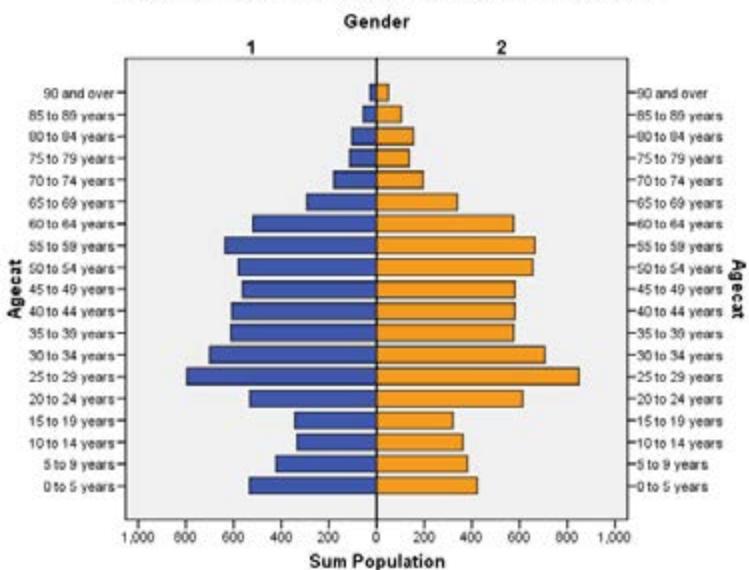


### Diversity Index

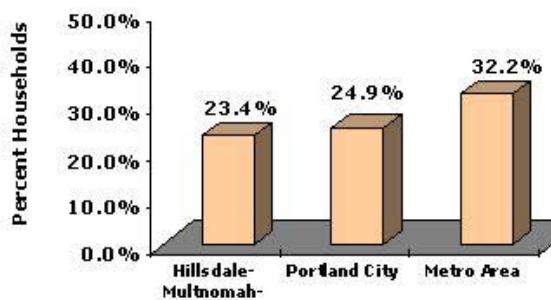
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



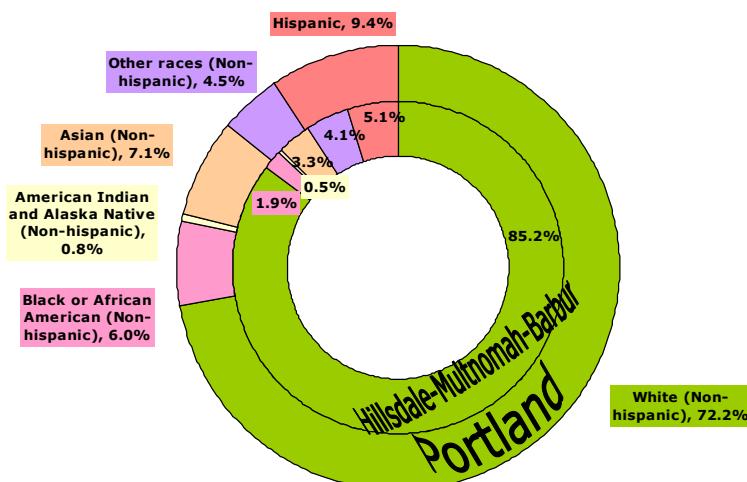
Population Pyramid for Hillsdale-Multnomah-Barbur, 2010



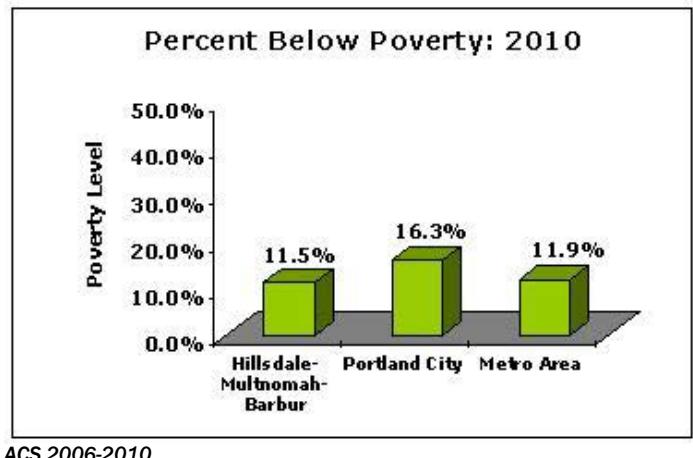
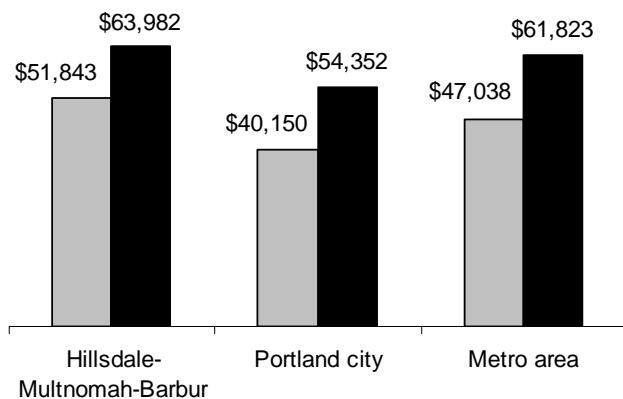
Households with Children Under 18 Years: 2010



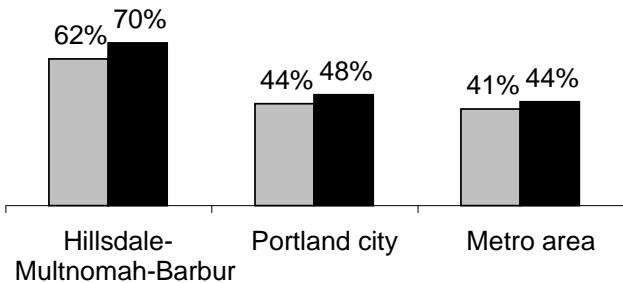
Racial and Ethnic Distribution in Portland vs. Hillsdale-Multnomah-Barbur



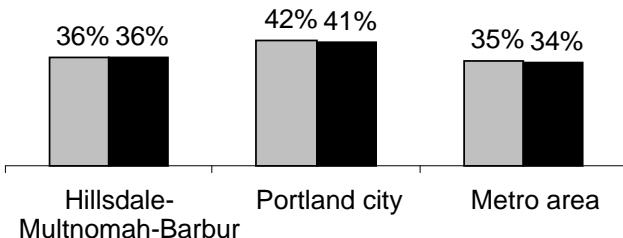
## Median Household Income



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Hillsdale-Multnomah-Barbur	Portland city	Metro area
2010	\$342,618	\$253,184	\$273,500
2000	\$202,698	\$154,721	\$168,347
% change	69.0%	63.6%	62.5%

# Hillsdale-Multnomah-Barbur Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

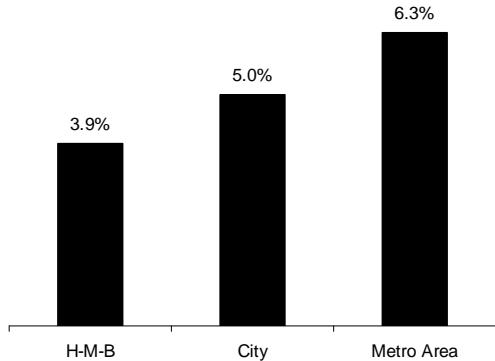
H-M-B	City	Metro Area
369,294	51,937,895	107,875,146

### OFFICE SPACE

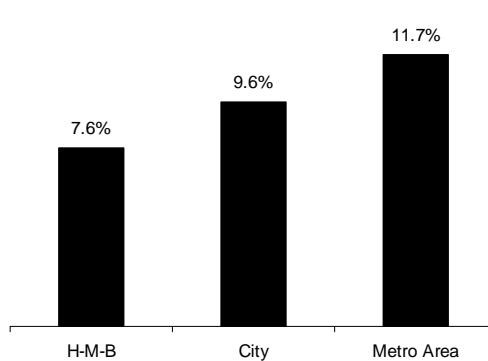
#### Square Feet

H-M-B	City	Metro Area
228,770	54,348,765	92,465,455

#### Retail Vacancy



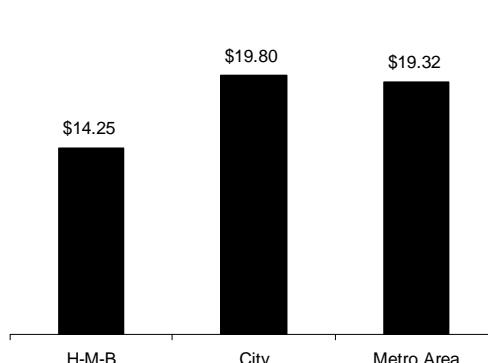
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Hillsdale-Multnomah-Barbur Analysis Area

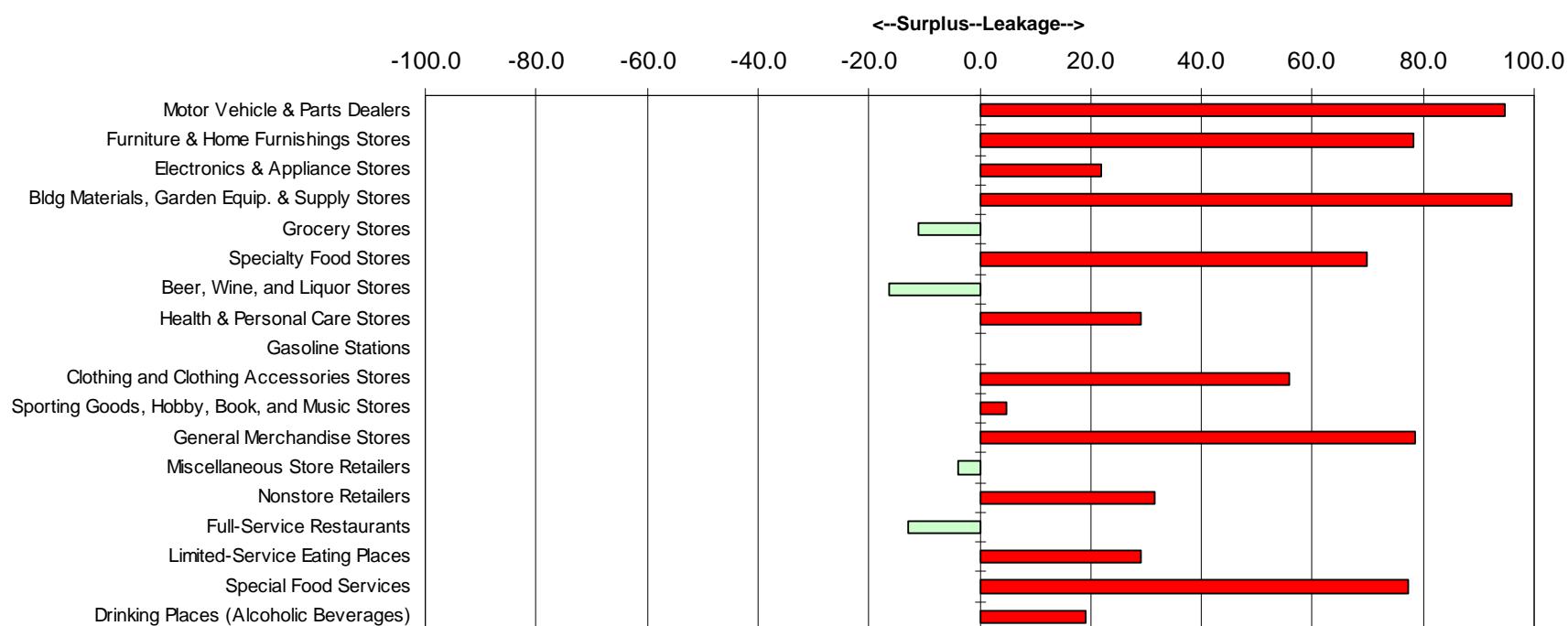
## Retail Market Profile

**Retail Gap = \$128 million**

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$288,231,738	\$160,363,054	\$127,868,684	28.5	190
Total Retail Trade (NAICS 44-45)	\$246,092,918	\$128,953,648	\$117,139,270	31.2	128
Total Food & Drink (NAICS 722)	\$42,138,820	\$31,409,406	\$10,729,414	14.6	62

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential. In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.” Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Hillsdale-Multnomah-Barbur Analysis Area

## Employment

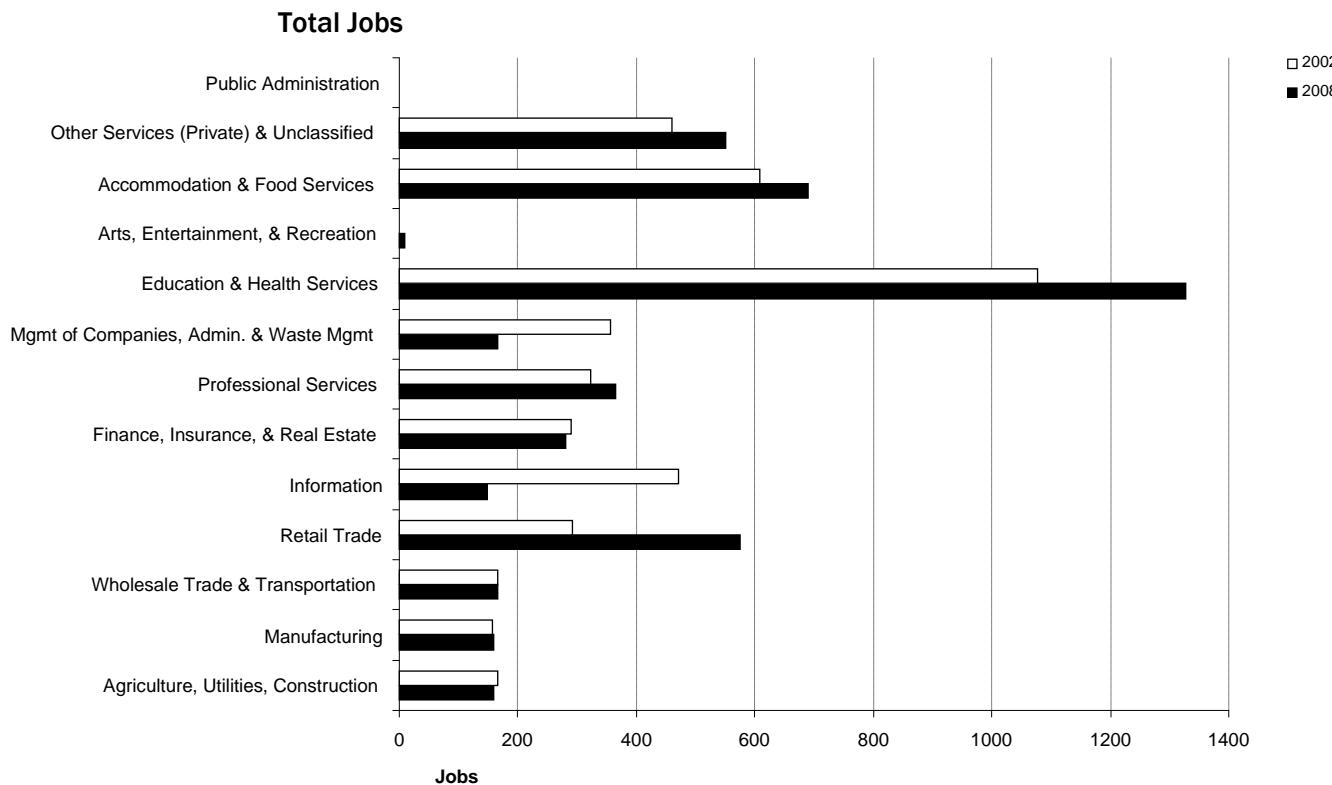
Quarterly Census of Employment and Wages data for 2002 & 2008

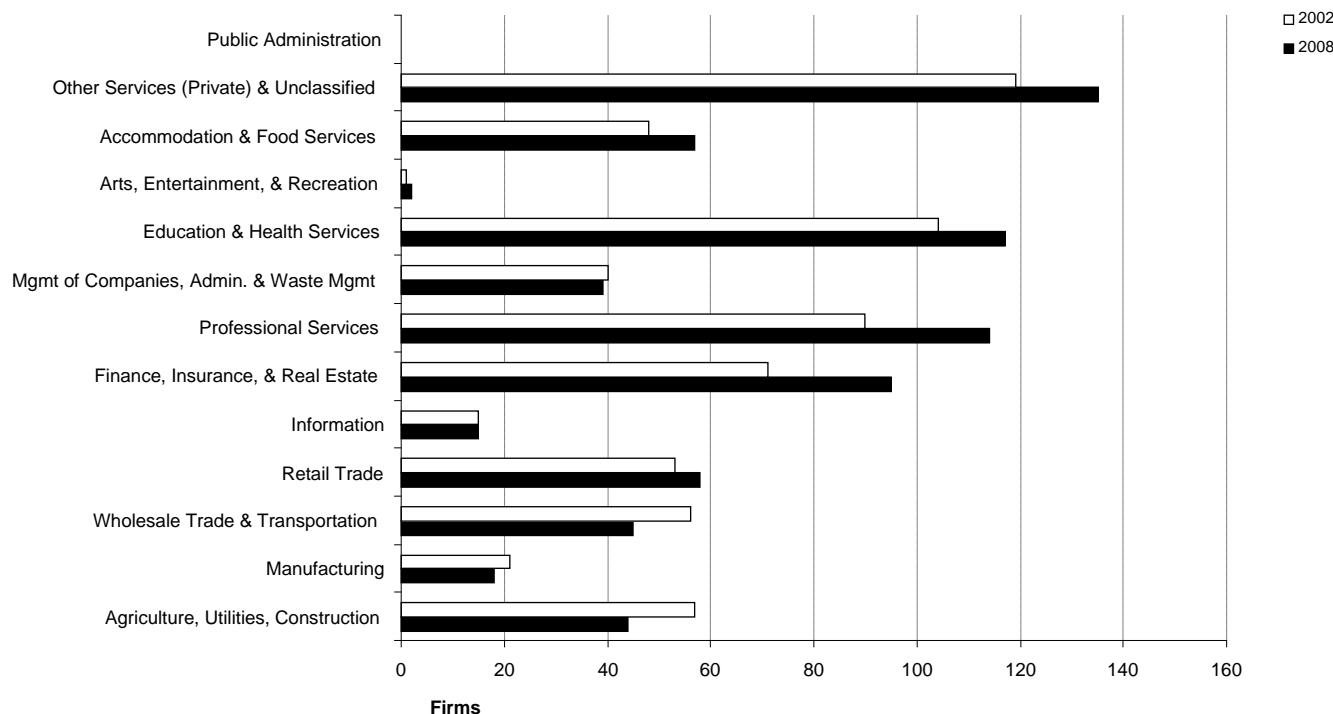
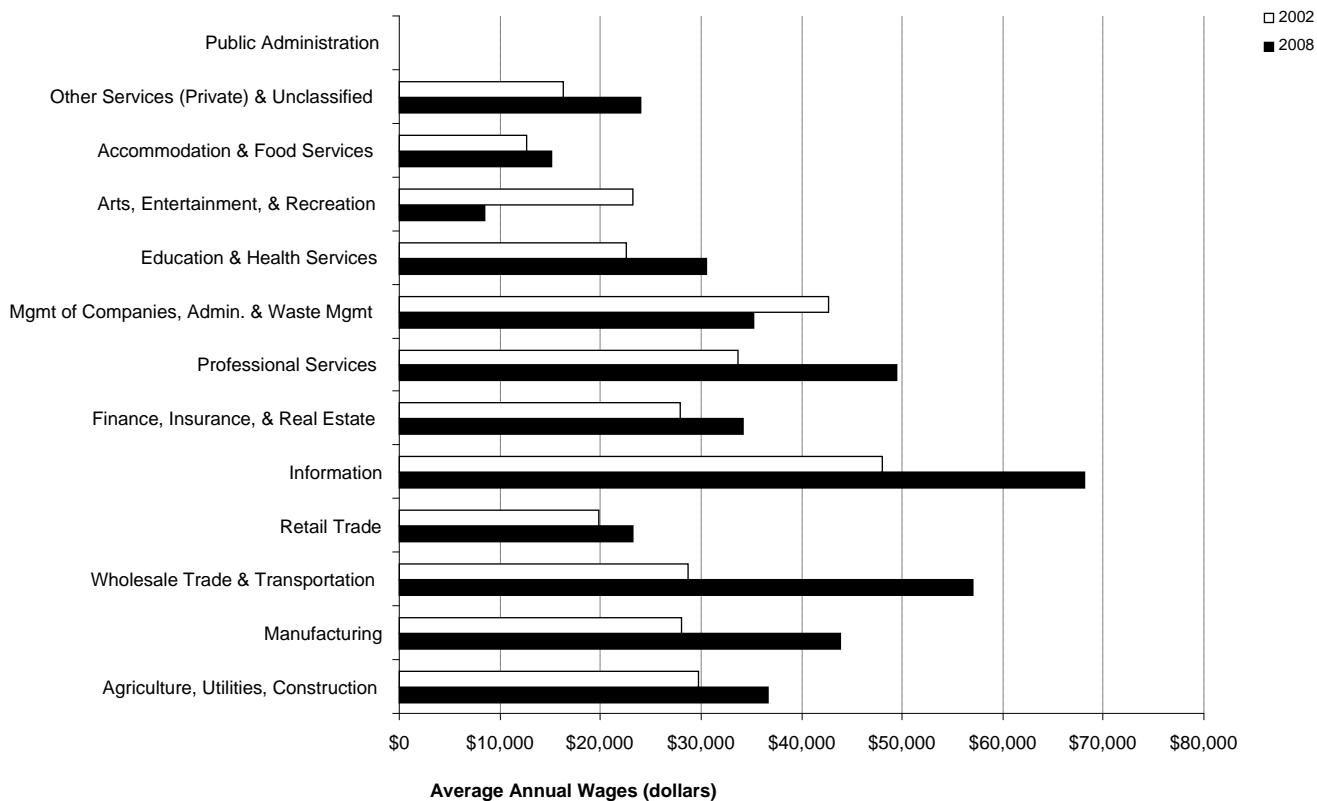
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	4,364	4,597	+233
Total Firms	675	739	+64
Average Annual Wages	\$26,057	\$31,254	+5,197



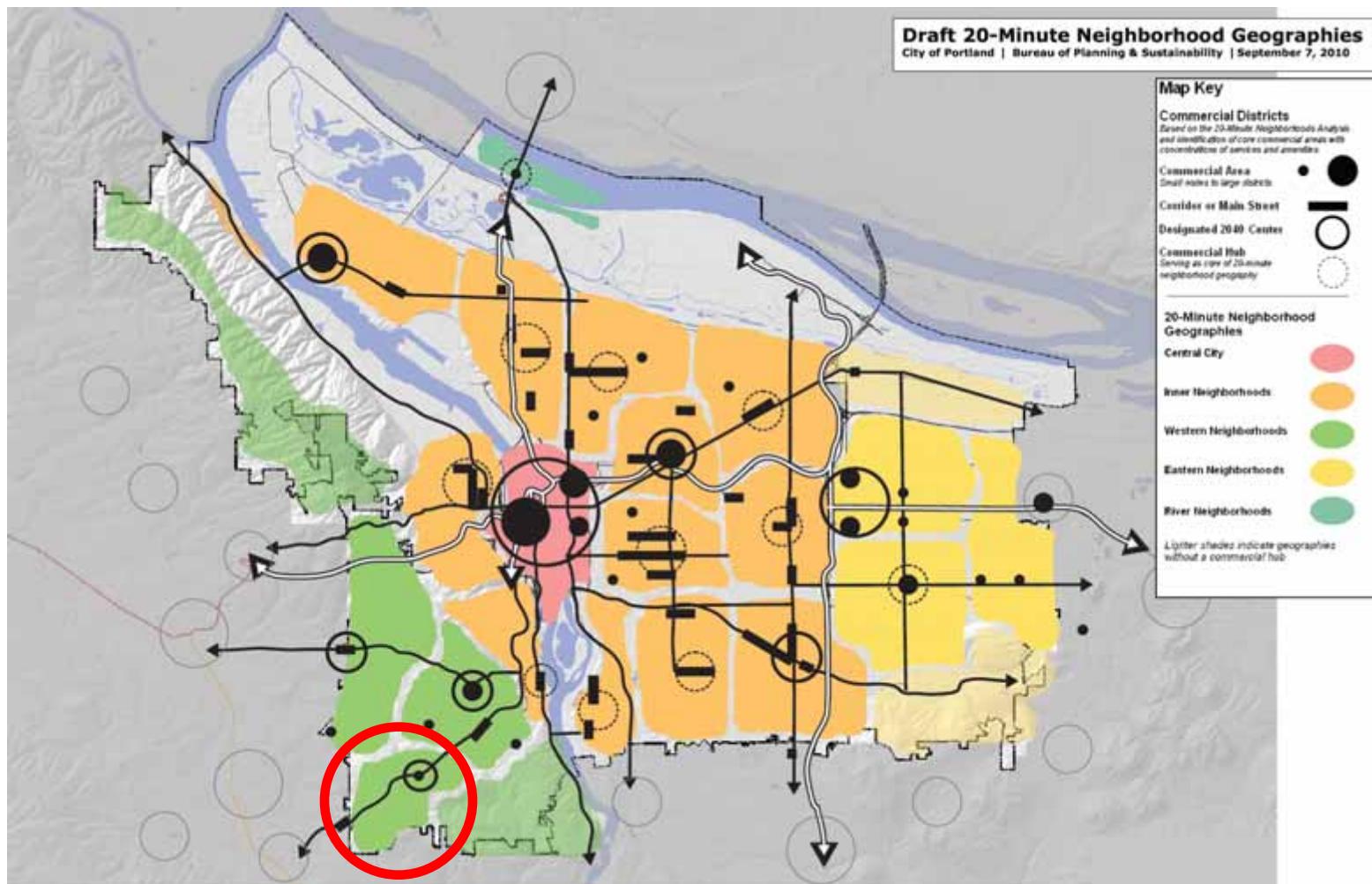
**Total Firms****Average Annual Wages**



## West Portland Analysis Area

Including Crestwood, Far Southwest, West Portland Park, and parts of the Ashcreek and Markham neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# West Portland Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 10,800 people (4,600 households)  
Land Area: 2.6 sq. miles (4,200 people per sq. mile)*

The area's commercial services are primarily located along SW Barbur, with some clustering of services around the intersection with Capitol Highway. A small clustering of commercial services is located at Capitol Highway and SW 49<sup>th</sup>. Larger concentrations of commercial services are located along SW Barbur just outside the west edge of the analysis area in Tigard.

**Grocery stores:** 1 (1 store per 4,600 households)

**Retail gap:** \$106 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

## Community Amenities

### Proximity to Services and Amenities

#### Percentage of population:

Within 1/2 mile of a park*:	83%
Within 1/2 mile of a public elementary school:	19%
Within 3 miles of a full-service community center*:	94%
Within 1/2 mile of a full-service grocery store:	13%
Within 1/4 mile of a frequent service transit stop:	15%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** 1 (Capitol Hill Library)

**Parks and Open Spaces:** 84 acres – including Dickinson, Sylvania, and Lesser parks, and the Ash Creek, Woods Memorial, and West Portland Park natural areas.

**Tree Canopy Coverage:** 42%

**Public Schools:** 3 K-8 schools (Markham and Stephenson\* elementary schools, Jackson Middle School)  
\*At edge of analysis area

**Colleges** (campus): Portland Community College - Sylvania

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** 1 (Barbur Boulevard Transit Center)

**Walkable Access Score:** 35 (out of 100)  
(from 20-Minute Neighborhoods Analysis Index)

## Neighborhood and Business Associations

**Neighborhood Associations:** Crestwood, Far Southwest, West Portland Park, and parts of Ashcreek and Markham

**Business Associations:** None

## Urban Form Characteristics

Natural features are prominent characteristics of this area, including gently-rolling hills, forested slopes, and occasional streams and ravines. The area is composed primarily of residential neighborhoods, which include a mix of gridded streets (sometimes interrupted by natural features) and some curvilinear streets that follow the area's topography. Most streets do not have sidewalks. The area's primary commercial corridor is Barbur Boulevard, predominated by auto-oriented development with surface parking lots.

**Access issues.** Most of the area lacks good street connectivity and most streets do not have sidewalks. Commercial and community services are beyond walking distance for most residents. The area has relatively low population densities and most residents do not have walkable access to frequent service transit. Topography and other natural features also limit pedestrian and bicycle accessibility in some parts of this area, and the I-5 Freeway and Barbur Boulevard serve as barriers.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

West Portland Town Center:	281 acres
Main Streets:	0
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	886	73%	130
Multi-Family Residential:	192	16%	144
Commercial/Mixed-Use:	71	6%	44
Employment:	0	0%	0
Industrial:	0	0%	0
Open Space:	71	6%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

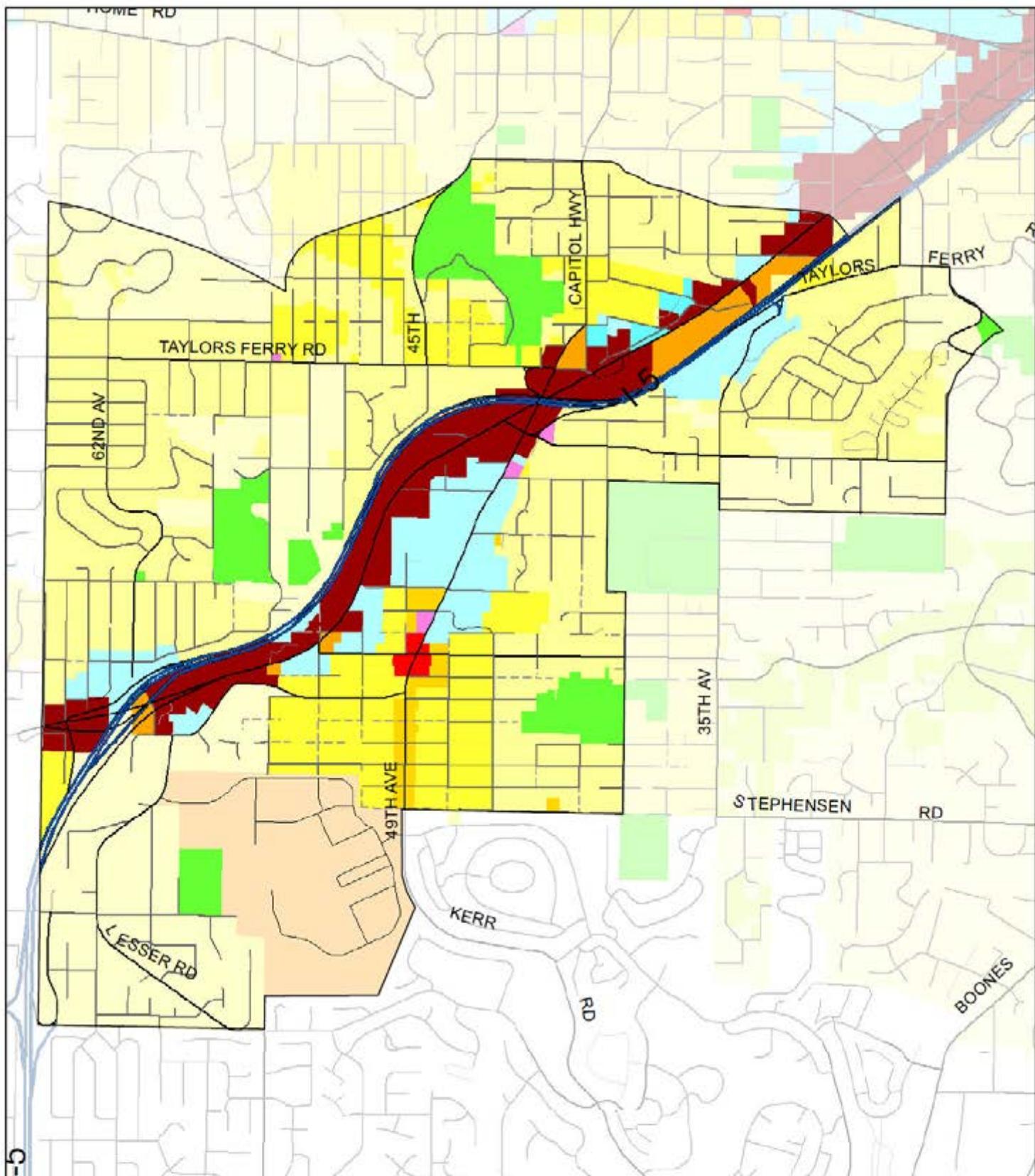
2010 Housing Units (Census):	4,826
2035 Housing Units:	6,300

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# West Portland Analysis Area



## Comprehensive Plan Designations

February 1, 2012

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### Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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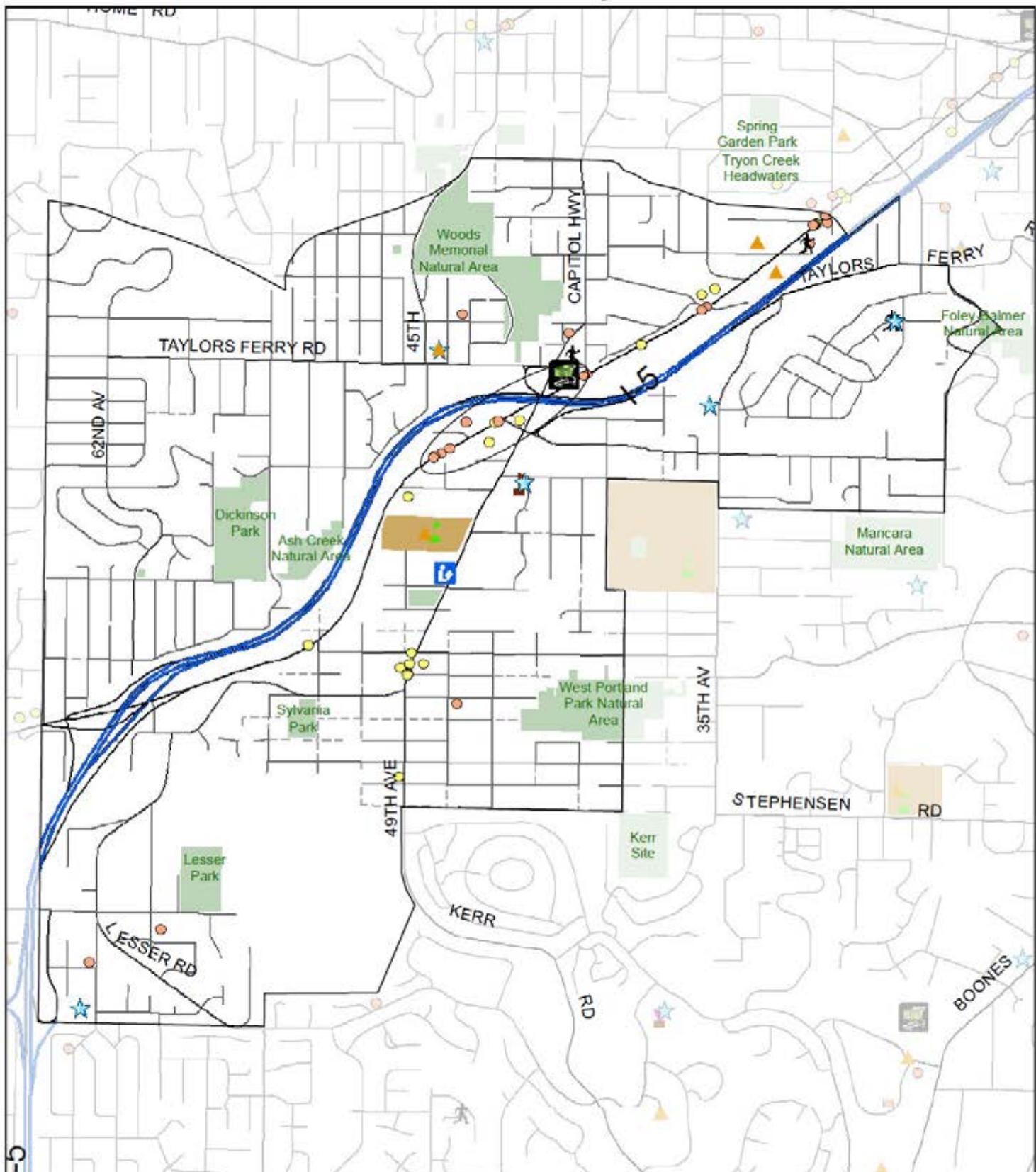


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City of Portland, Oregon  
Tom Adams, Mayor - Susan Anderson, Director

# West Portland Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008

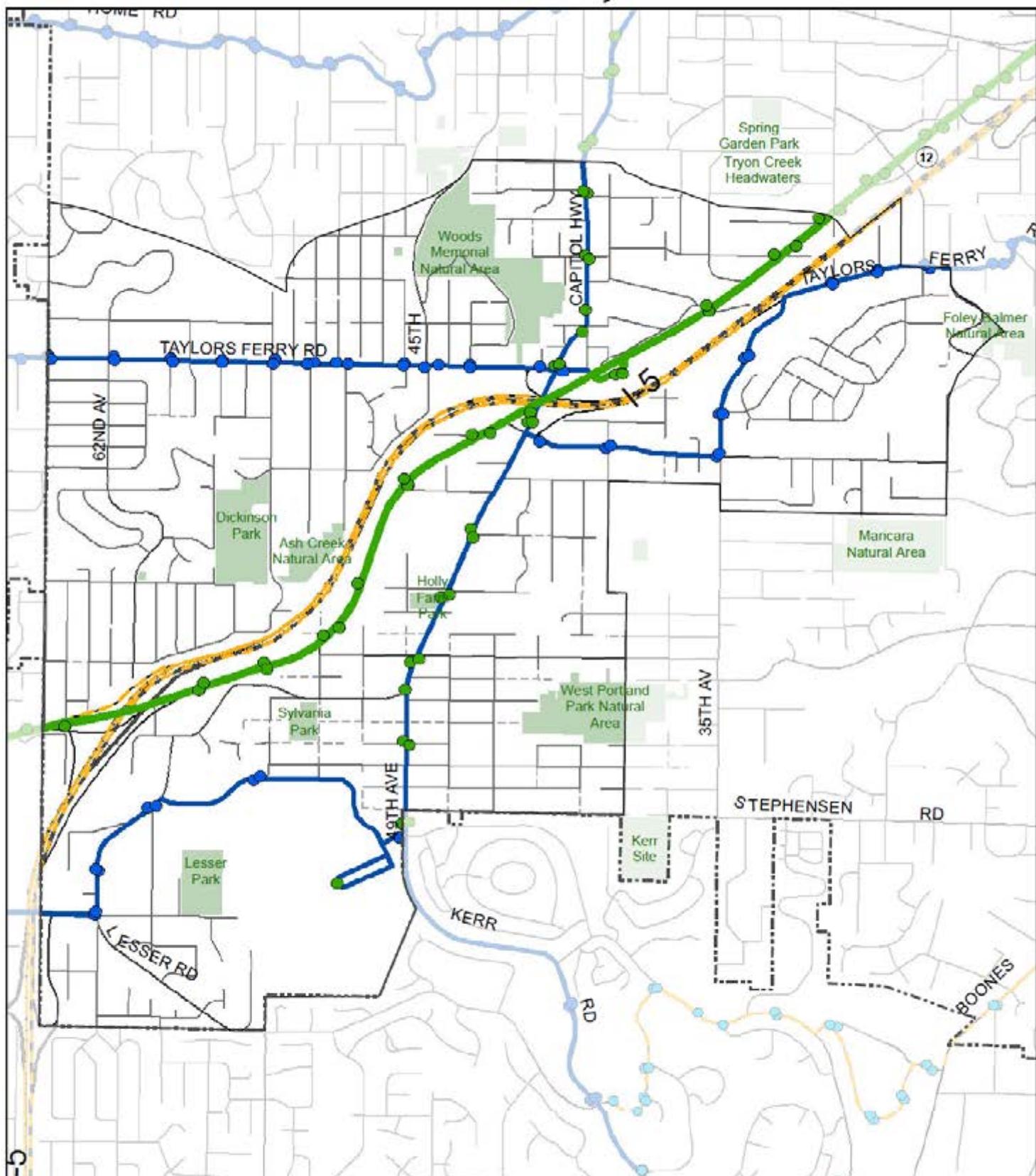
- |                    |           |                 |
|--------------------|-----------|-----------------|
| Type 1 Commercial  | Libraries | Preschools      |
| Type 2 Commercial  |           | Daycare Centers |
| Commercial Cluster |           | Public HS       |
| Fitness Centers    |           | Public K-8      |
| Grocery Stores     |           | Private Schools |
| Places of Worship  |           |                 |



0 1,000 2,000 3,000 Feet

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Sam Adams Mayor • Jessie Johnson Director

# West Portland Analysis Area



## Transit Infrastructure

August 9, 2011

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- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary



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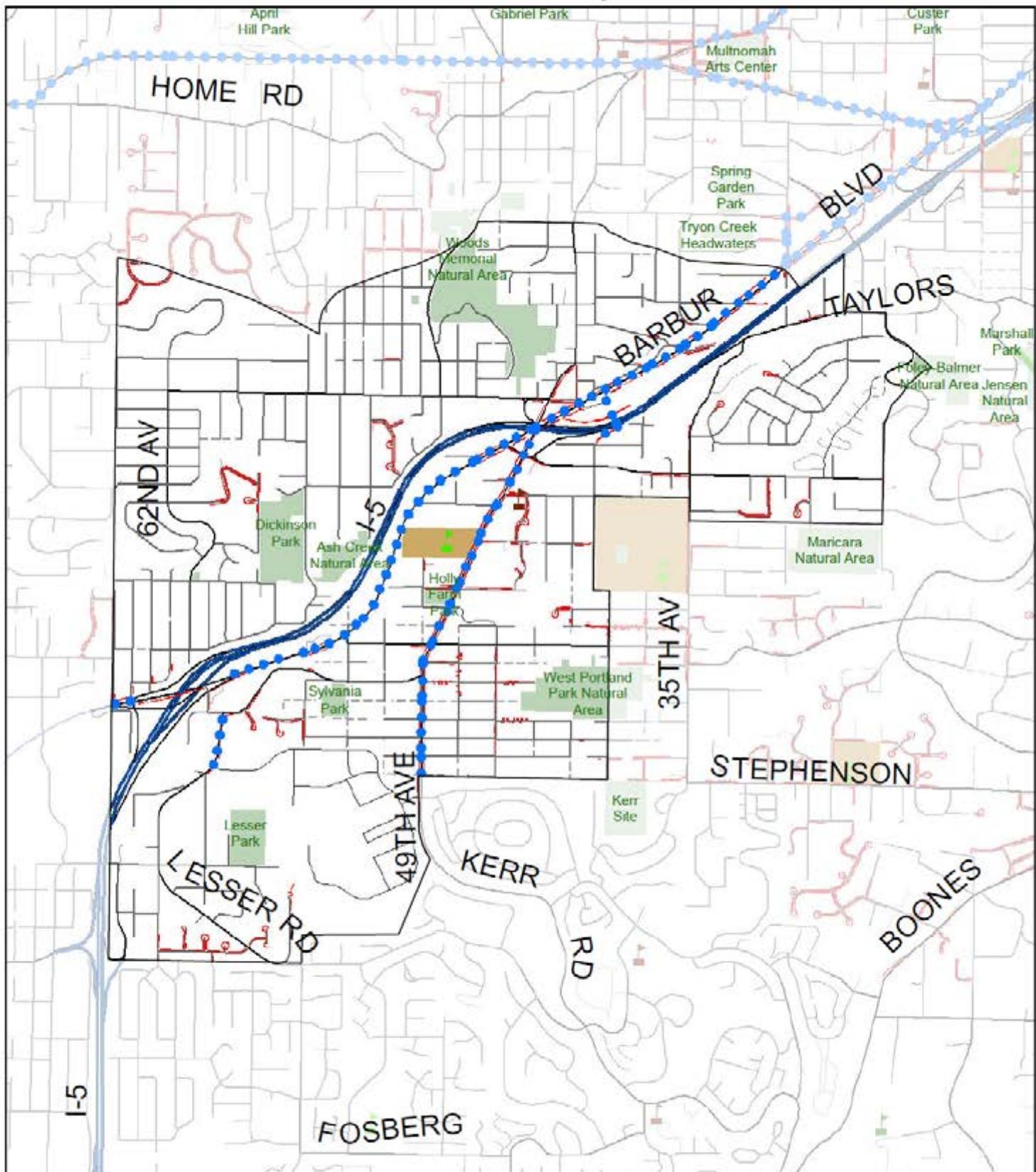


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# West Portland Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools

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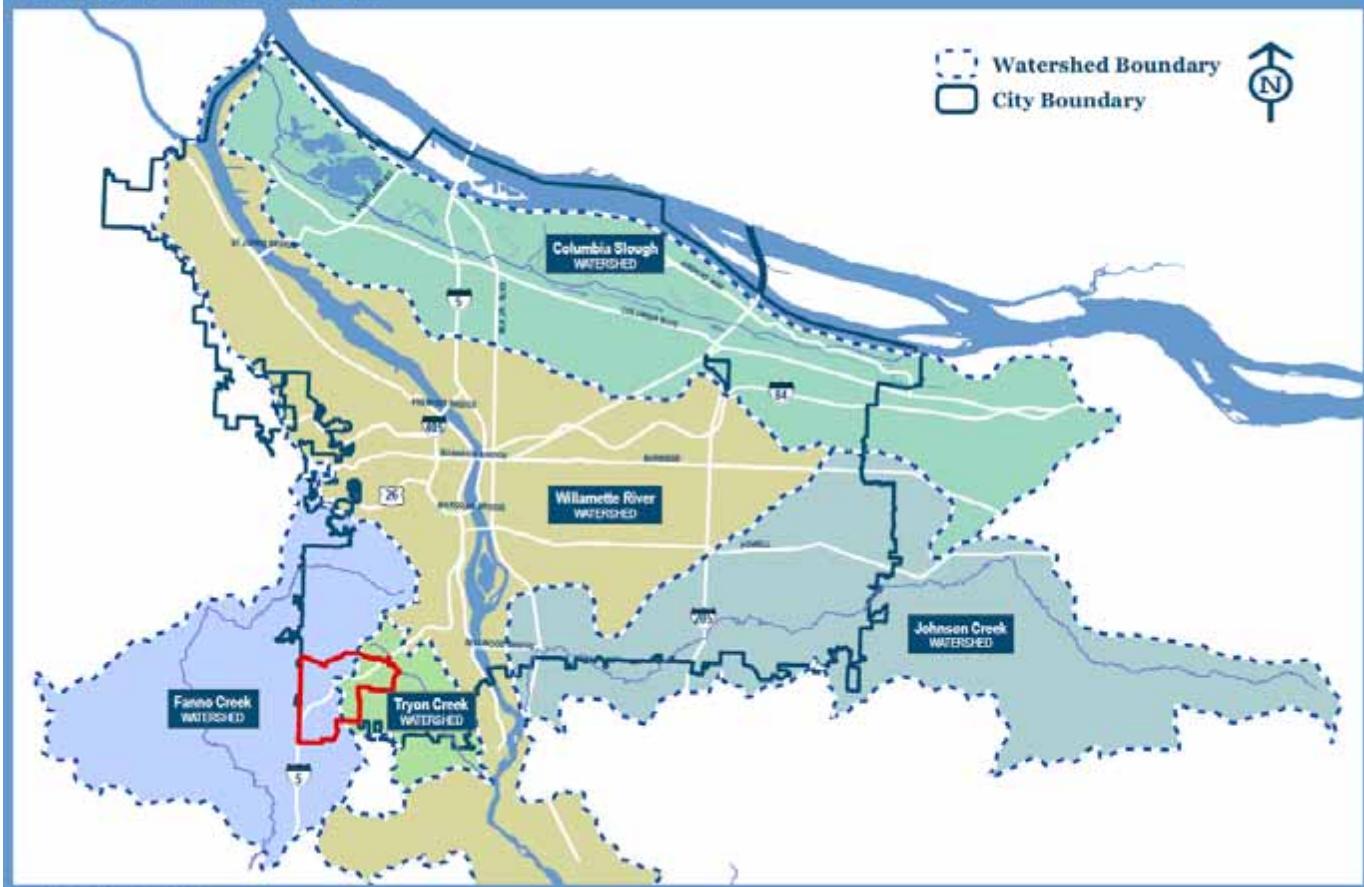


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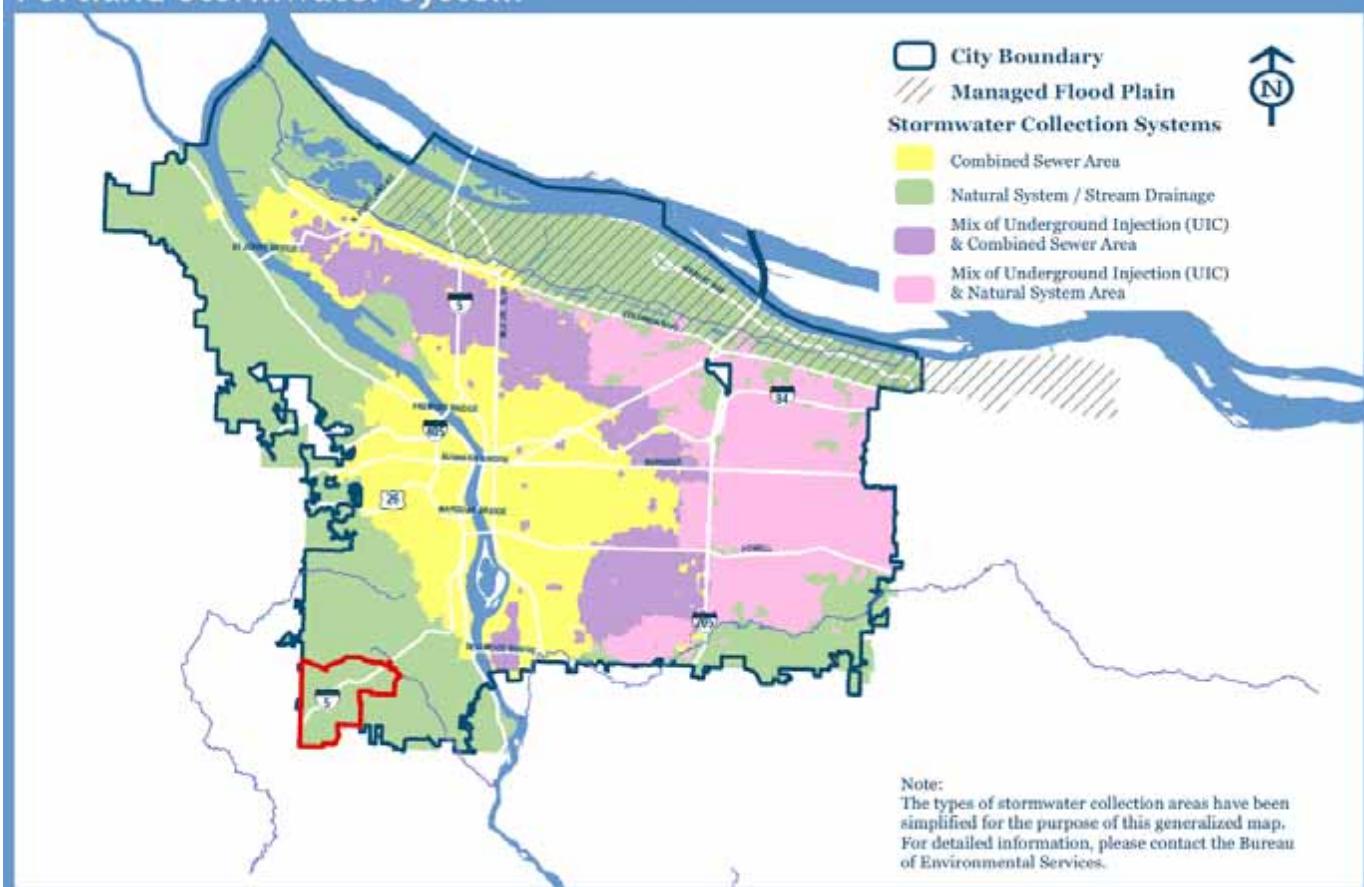


Sam Adams, Mayor • Jason Anderson, Director

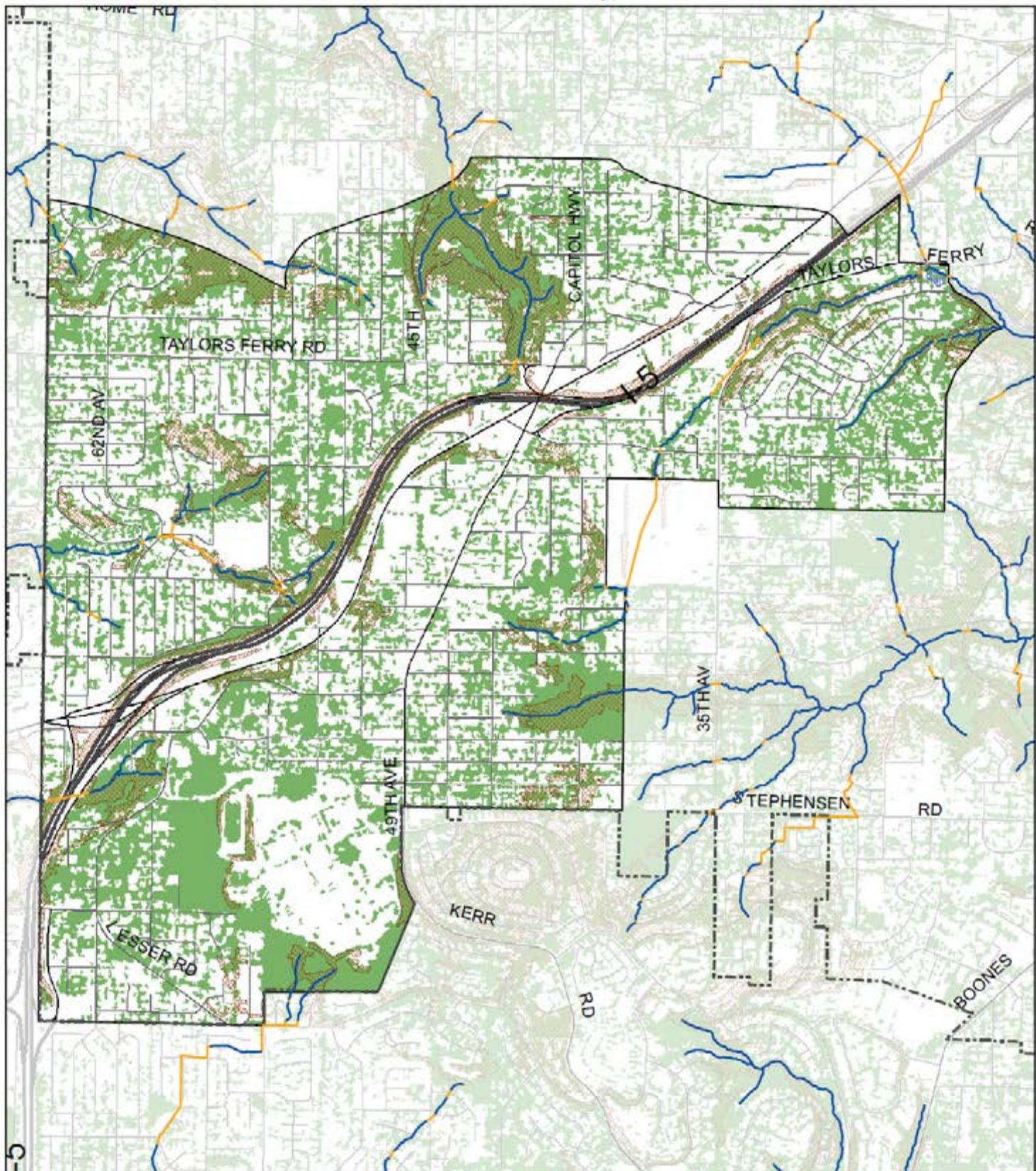
## Portland Watersheds



## Portland Stormwater System



# West Portland Analysis Area



## Watersheds and Natural Features

August 9, 2011

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- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary



0 1,000 2,000 3,000  
Feet



# West Portland Analysis Area

## Demographics (2000 – 2010)

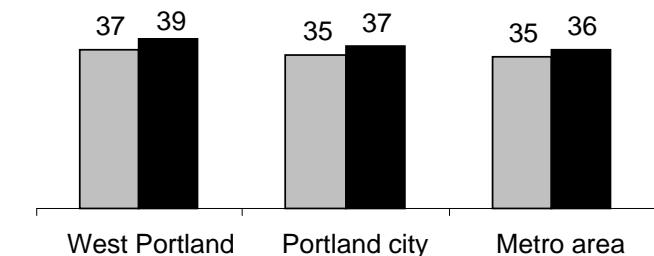
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

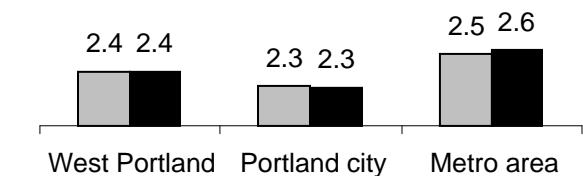
	West Portland	Portland city	Metro area
2010	10,836	583,776	2,226,009
2000	10,481	529,121	1,927,881
% change	3%	10%	15%

■ 2000 ■ 2010

### Median Age

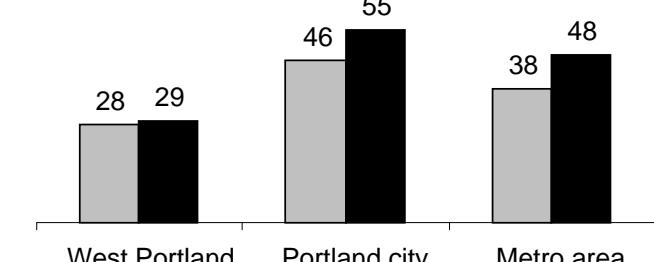


### Average Household Size

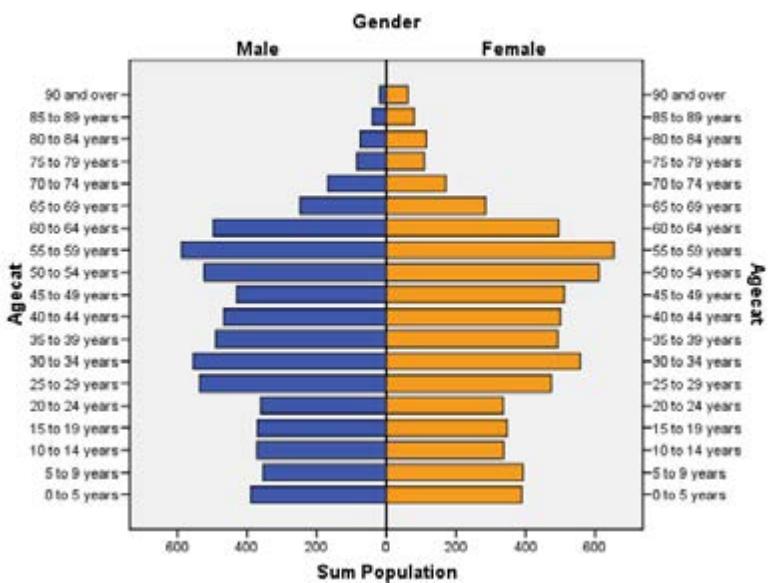


### Diversity Index

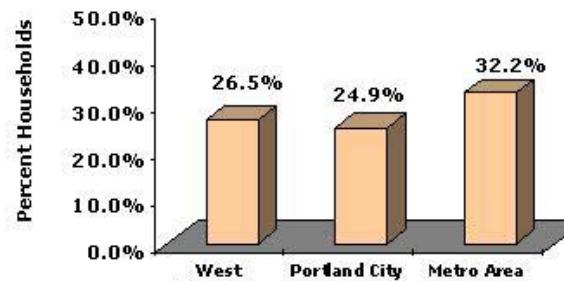
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



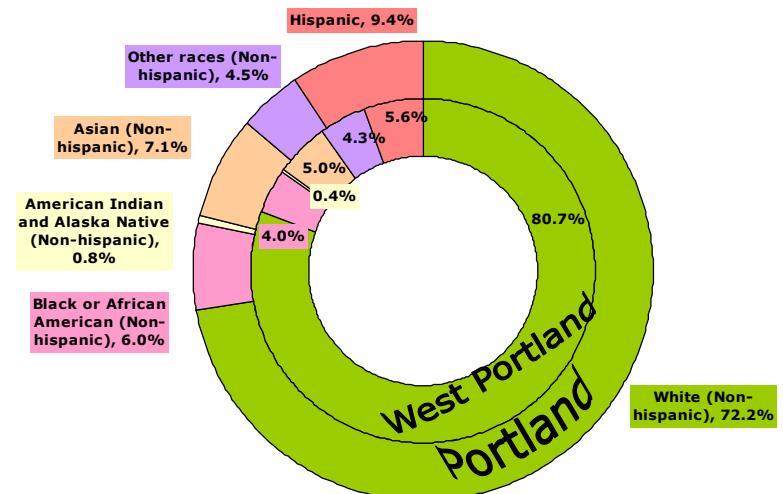
Population Pyramid for West Portland, 2010

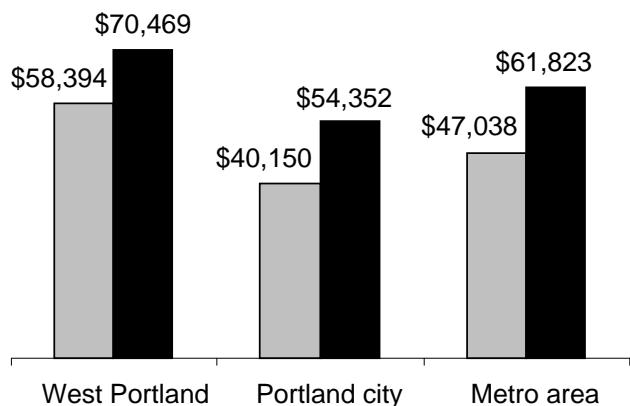
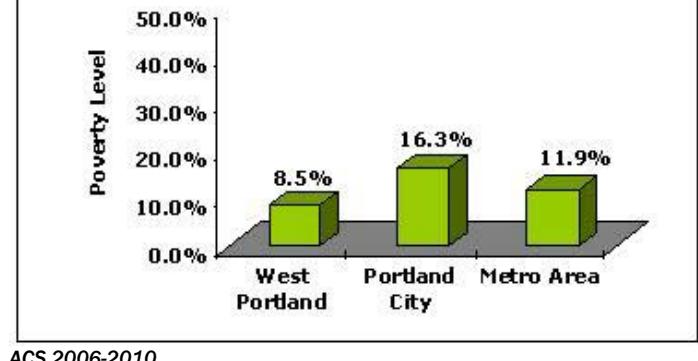
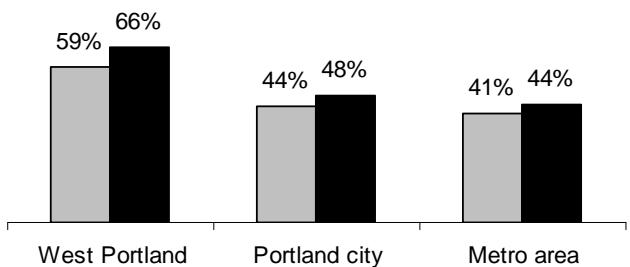
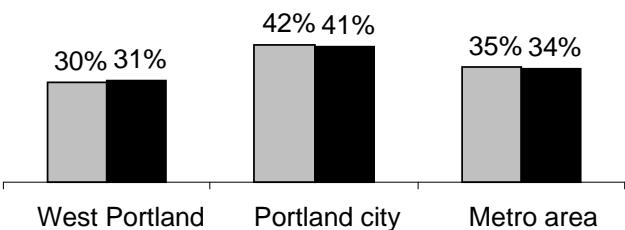


Households with Children Under 18 Years: 2010



Racial and Ethnic Distribution in Portland vs. West Portland



**Median Household Income****Percent Below Poverty: 2010****Percent College Graduates****Percent Renters of Occupied Housing Units****Median Home Value**

	West Portland	Portland city	Metro area
2010	\$319,207	\$253,184	\$273,500
2000	\$186,698	\$154,721	\$168,347
% change	71.0%	63.6%	62.5%

# West Portland Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

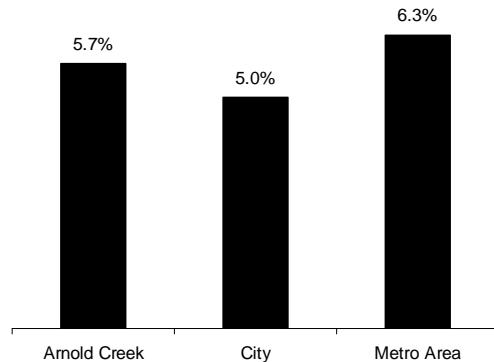
West Portland	City	Metro Area
139,578	51,937,895	107,875,146

### OFFICE SPACE

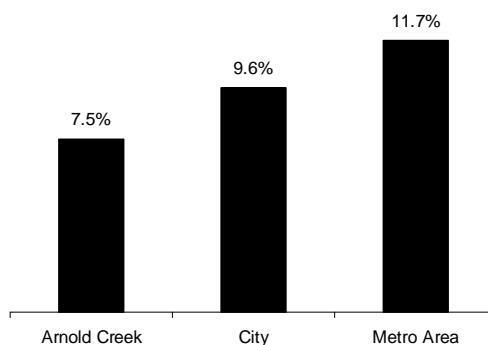
#### Square Feet

West Portland	City	Metro Area
433,333	54,348,765	92,465,455

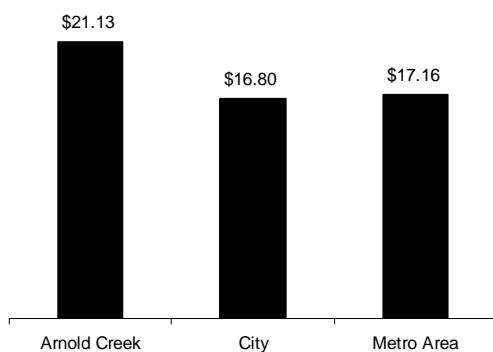
#### Retail Vacancy



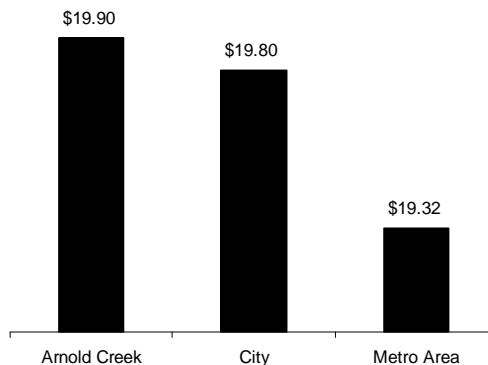
#### Office Vacancy



#### Retail Rents



#### Office Rents



# West Portland Analysis Area

## Retail Market Profile

**Retail Gap = \$106 million**

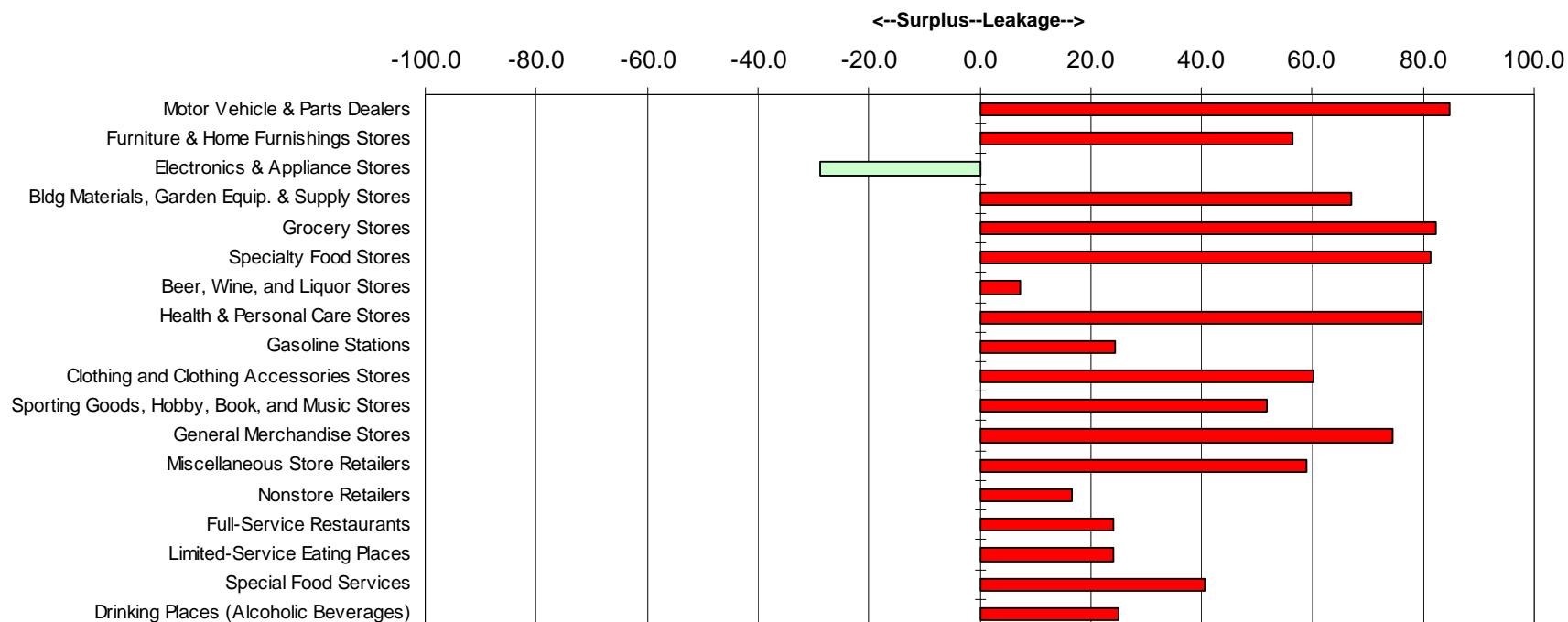
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$156,753,122	\$50,287,067	\$106,466,055	51.4	93
Total Retail Trade (NAICS 44-45)	\$133,872,072	\$36,878,384	\$96,993,688	56.8	68
Total Food & Drink (NAICS 722)	\$22,881,050	\$13,408,683	\$9,472,367	26.1	25

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# West Portland Analysis Area

## Employment

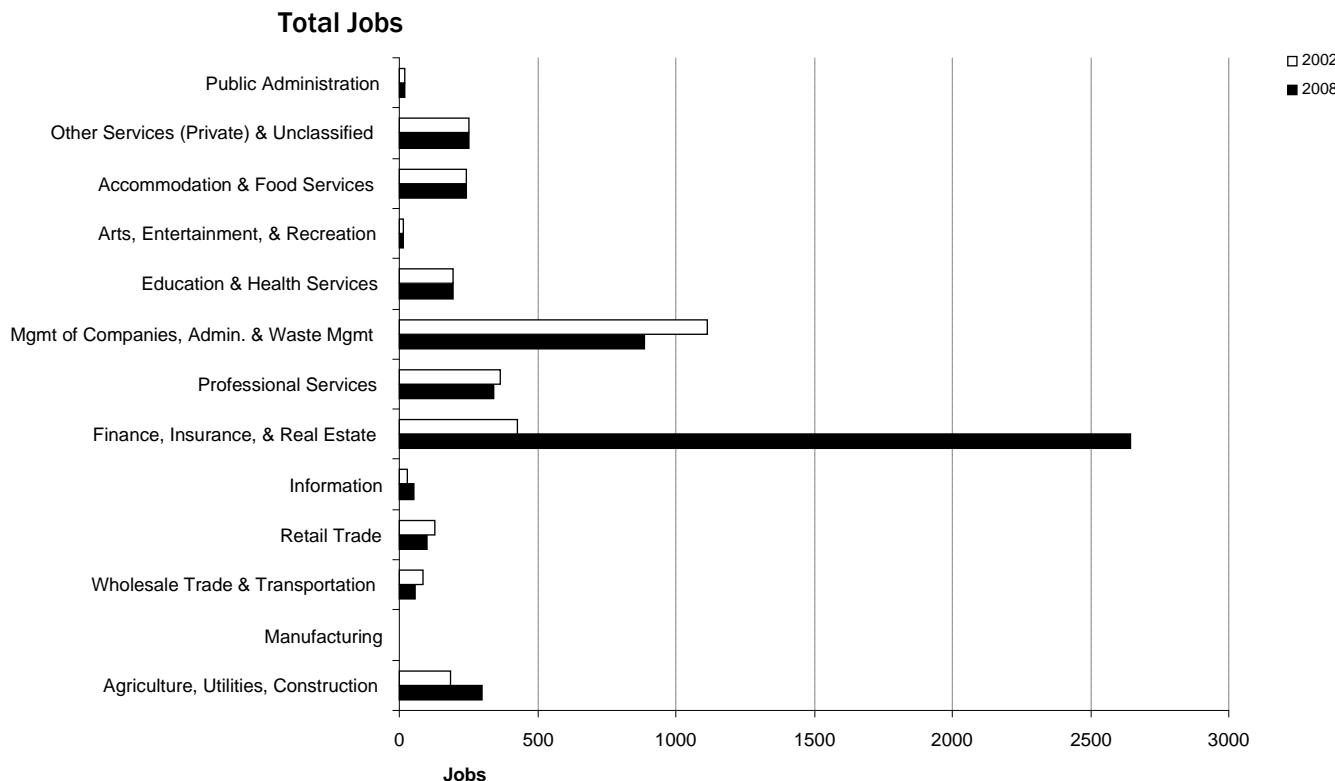
Quarterly Census of Employment and Wages data for 2002 & 2008

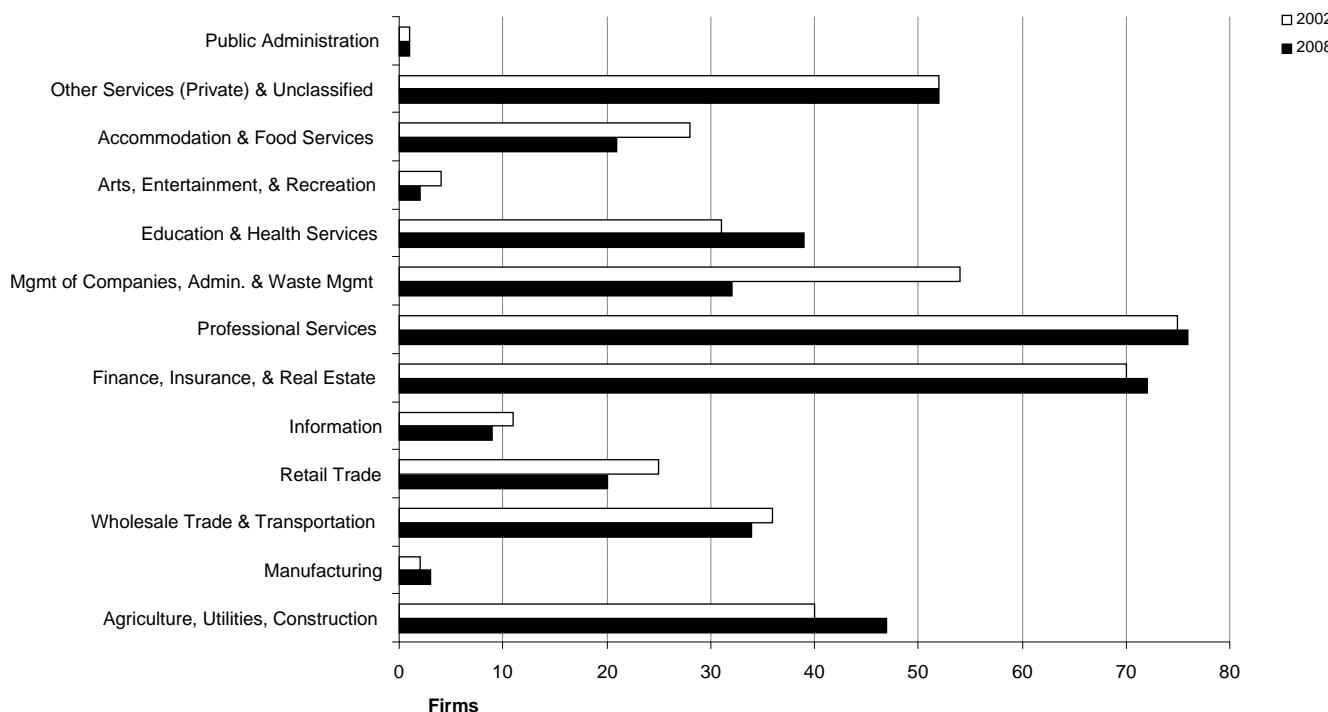
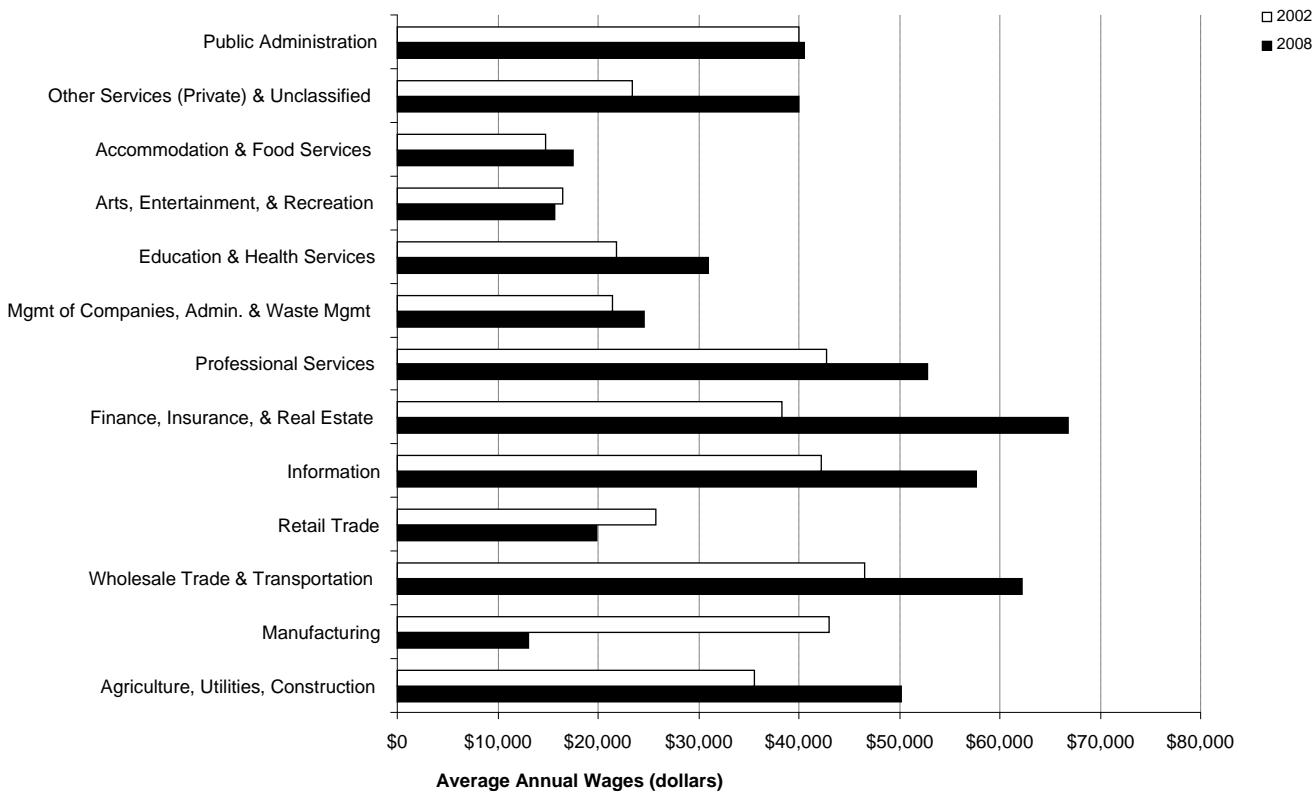
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	3,061	5,104	+2,043
Total Firms	429	408	- 21
Average Annual Wages	\$28,038	\$45,600	+17,562



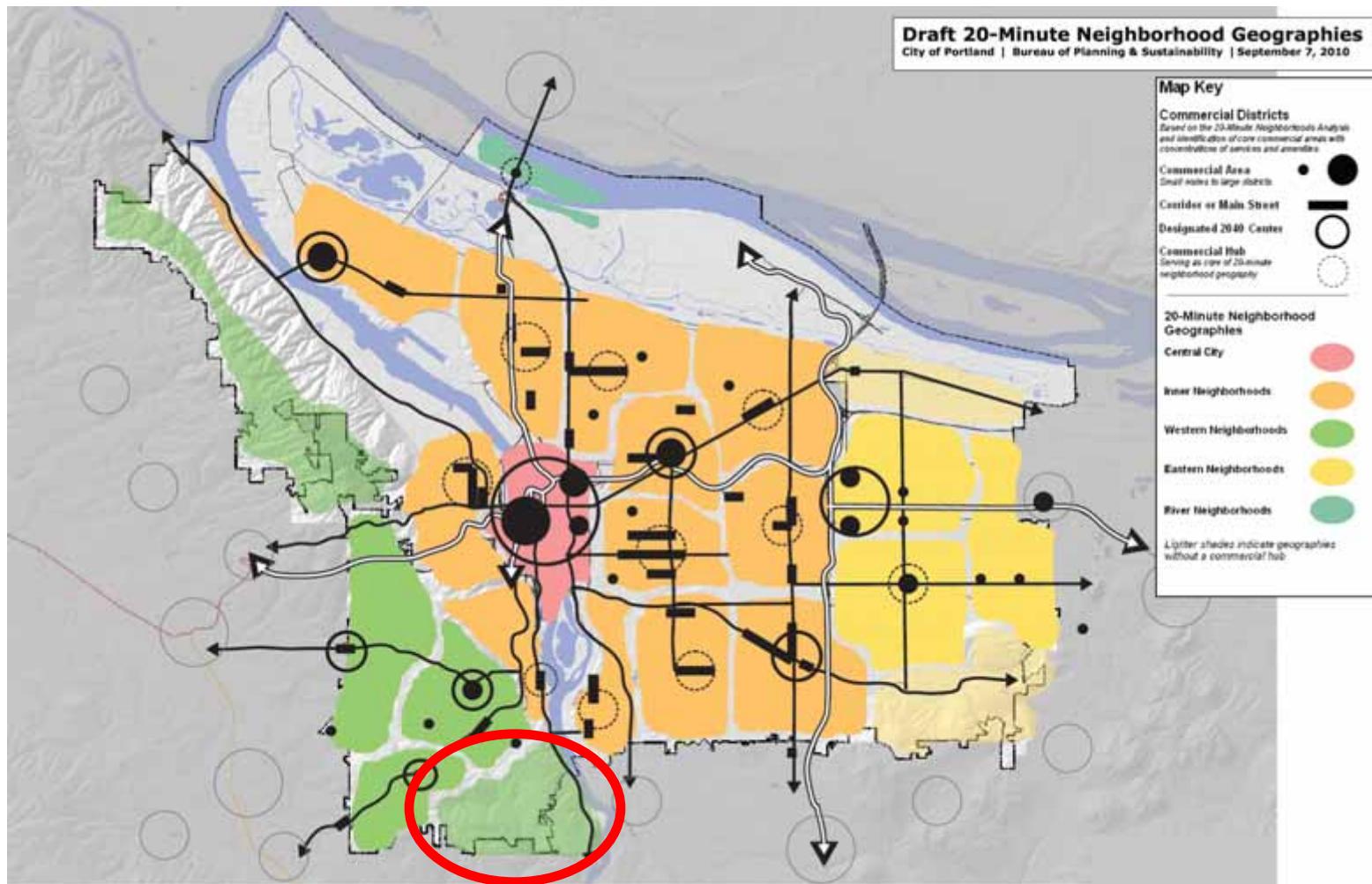
**Total Firms****Average Annual Wages**



## Tryon Creek-Riverdale Analysis Area

Including Collins View, Marshall Park, Arnold Creek, and Dunthorpe neighborhoods

## Services, Demographics and Market Summary



## 20-Minute Neighborhoods Analysis

June 5, 2012

Note: Analysis areas used in this report were based around existing core neighborhood business districts and surrounding residential areas as part of an assessment of local access to services. While many of these commercial areas have at least some neighborhood hub functions, their inclusion in these summary reports and the associated analysis area geographies are for analysis purposes only. The hubs and geographies used in these summaries do not preclude the community's identification of other locations for neighborhood hubs during the upcoming update of the Comprehensive Plan.

# Tryon Creek-Riverdale Analysis Area

## Services and Amenities

### Commercial Districts

*Population: 9,700 people (3,400 households)  
Land Area: 5.1 sq. miles (1,900 people per sq. mile)*

The area has almost no commercial services. Nearby commercial districts include downtown Lake Oswego (south of the analysis area), and a small clustering of commercial services at SW Terwilliger and Taylors Ferry (outside the northern edge of the analysis area).

**Grocery stores:** None

**Retail gap:** \$140 million gap (*amount of estimated yearly retail spending by the analysis area population that is in excess of the retail sales generated by area businesses, indicating the extent to which retail spending is leaving the neighborhood market area*)

### Community Amenities

#### Proximity to Services and Amenities

##### Percentage of population:

Within 1/2 mile of a park*:	19%
Within 1/2 mile of a public elementary school:	7%
Within 3 miles of a full-service community center*:	26%
Within 1/2 mile of a full-service grocery store:	4%
Within 1/4 mile of a frequent service transit stop:	0%

\*Parks Bureau service standard

**Community Centers:** None

**Libraries:** None

**Parks and Open Spaces:** 532 acres – including Tryon Creek State Park, Powers Marine Park, and the Maricara and Jensen natural areas.

**Tree Canopy Coverage:** 67%

**Public Schools:** 1 high school (Riverdale)

2 K-8 schools (Riverdale Grade School, Stephenson Elementary\*)

\*At edge of analysis area

**Colleges** (campus): 1 (Lewis and Clark College)

**Hospitals:** None

**Farmers Markets:** None

**Transit Centers/Stations:** None

**Walkable Access Score:** 15 (out of 100)

(from 20-Minute Neighborhoods Analysis Index)

### Neighborhood and Business Associations

**Neighborhood Associations:** Collins View, Marshall Park, Arnold Creek, and Dunthorpe

**Business Associations:** None

## Urban Form Characteristics

Natural areas and features are the most prominent characteristics of this area, including Tryon Creek and smaller streams, ravines, and forested slopes. Tryon Creek State Park and other natural areas occupy large portions of the area. Residential areas are sometimes tucked within natural areas, with curvilinear streets often following topography. The Willamette River borders the area to the east.

**Access issues.** The area does not have an urban level of street connectivity and most streets do not have sidewalks. It does have a relatively high level of natural system connectivity and good access to trails. The area has low population densities, no commercial areas and limited transit service. Topography and other natural features also limit pedestrian and bicycle accessibility.

## 2040 Growth Concept: Designated Mixed-Use Areas

*The 2040 Growth Concept sets direction for the region's growth and calls for focusing residential and commercial development in and around transit-oriented mixed-use areas that have a mix of businesses and housing.*

Mixed-Use Centers:	0
Main Streets:	0
Station Communities:	0

## Zoning

	Acres	% of Land Area	Buildable Acres*
Single-Family Residential:	1,799	64%	488
Multi-Family Residential:	143	5%	142
Commercial/Mixed-Use:	0	0%	0
Employment:	0	0%	0
Industrial:	0	0%	0
Open Space:	850	30%	NA

\*From Buildable Lands Inventory (vacant or underutilized)

## Anticipated Growth by 2035

*(From Buildable Lands Inventory allocations, based on development capacity and trend information)*

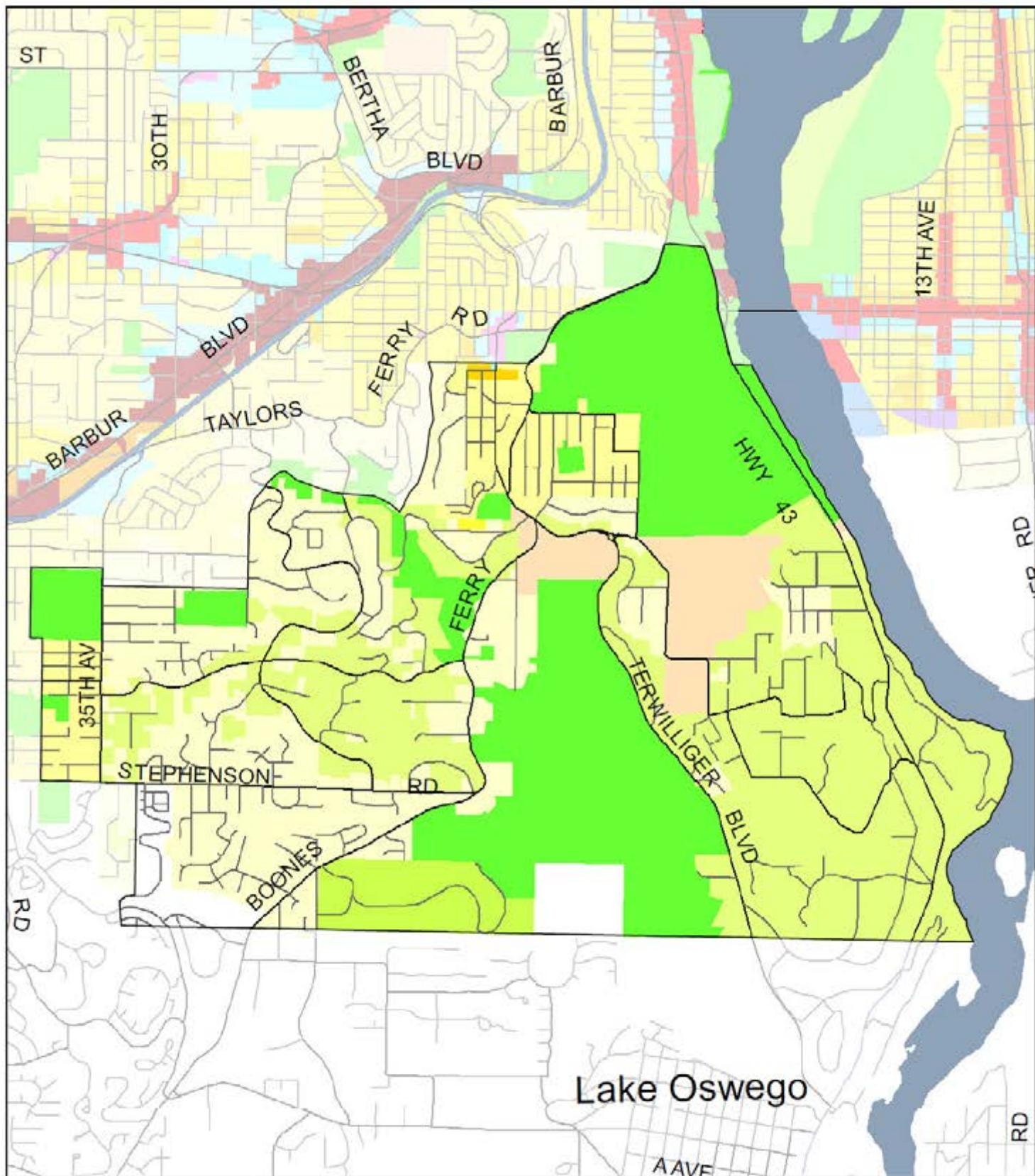
2010 Housing Units (Census):	3,374
2035 Housing Units:	4,100

### Comprehensive Plan Designations Map (next page)

#### Associated generalized zoning:

Single-Family Residential:	RF, R20, R10, R7, R5, R2.5
Multi-Family Residential:	R3, R2, R1, RH, RX, IR
Commercial/Mixed-Use:	NC, OC, UC, CG, CX, EX
Employment:	ME
Industrial:	IS
Open Space:	OS

# Tryon Creek-Riverdale Analysis Area



## Legend

OS	R5	RH	UC	IS
RF	R2.5	RX	CG	
R20	R3	IR	CX	
R10	R2	NC	ME	
R7	R1	OC	EX	



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Feet

## Comprehensive Plan Designations

February 1, 2012

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# Tryon Creek-Riverdale Analysis Area



## Services and Amenities

August 9, 2011  
commercial data: InfoUSA 2008



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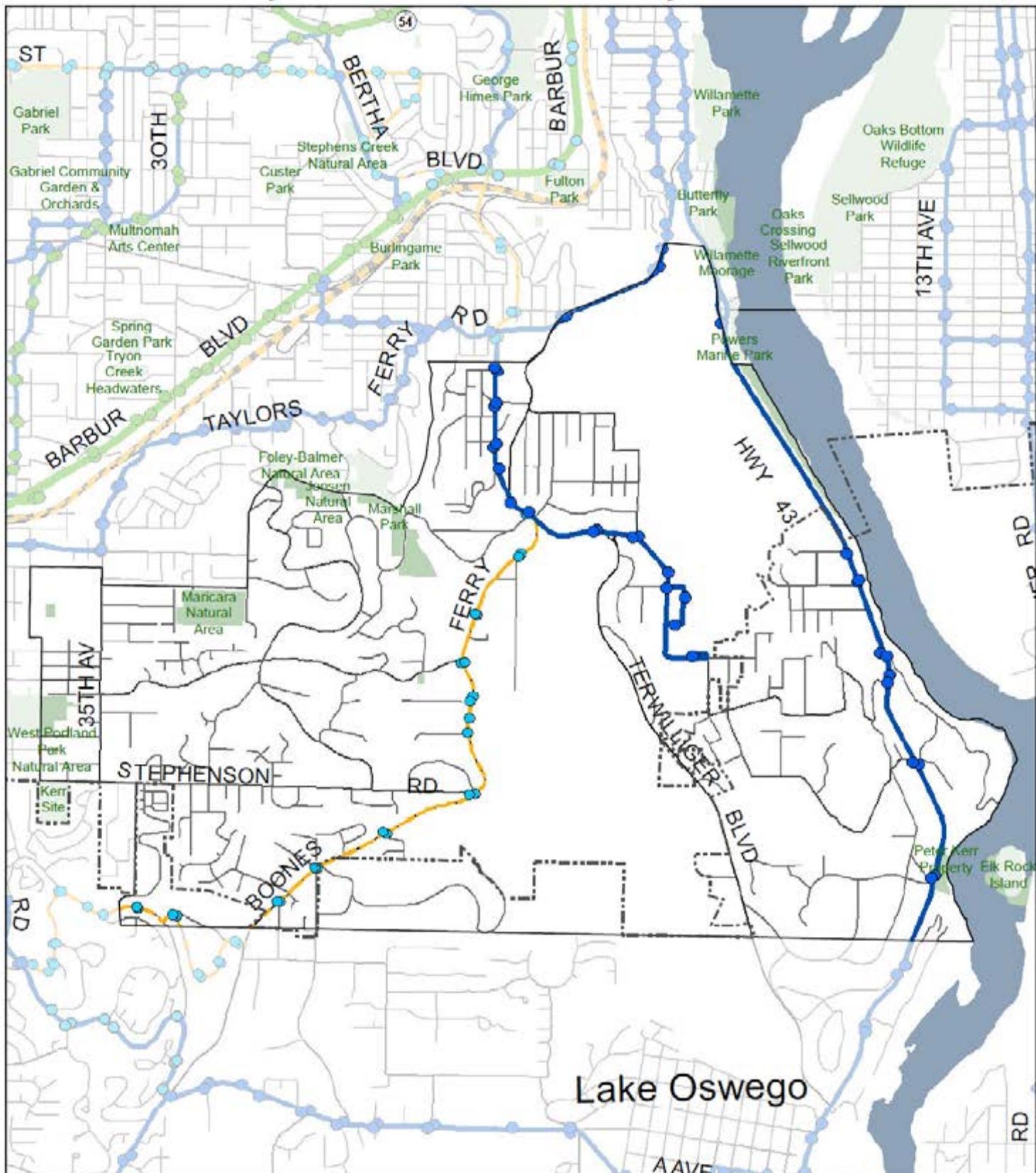


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# Tryon Creek-Riverdale Analysis Area



## Transit Infrastructure

August 9, 2011

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- MAX
- Streetcar
- Frequent Service
- Standard Service
- Rush-Hour Only Service
- City Boundary



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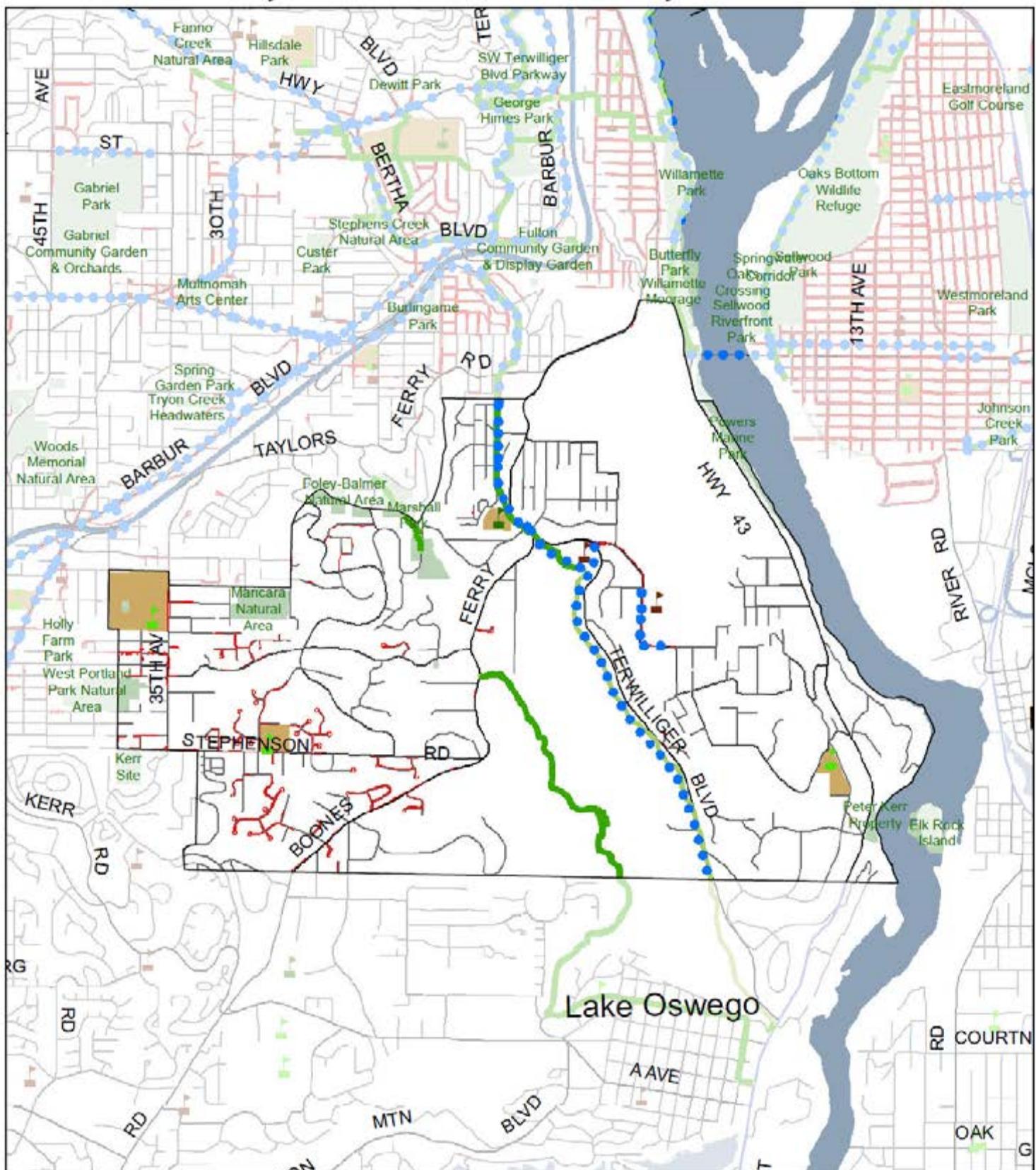


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# Tryon Creek-Riverdale Analysis Area



## Sidewalks and Bicycle Infrastructure

August 9, 2011

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- Sidewalks
- Existing Bike Facility
- regional trails outside Portland (existing)
- regional trails in Portland

- Public HS
- Public K-8
- Private Schools



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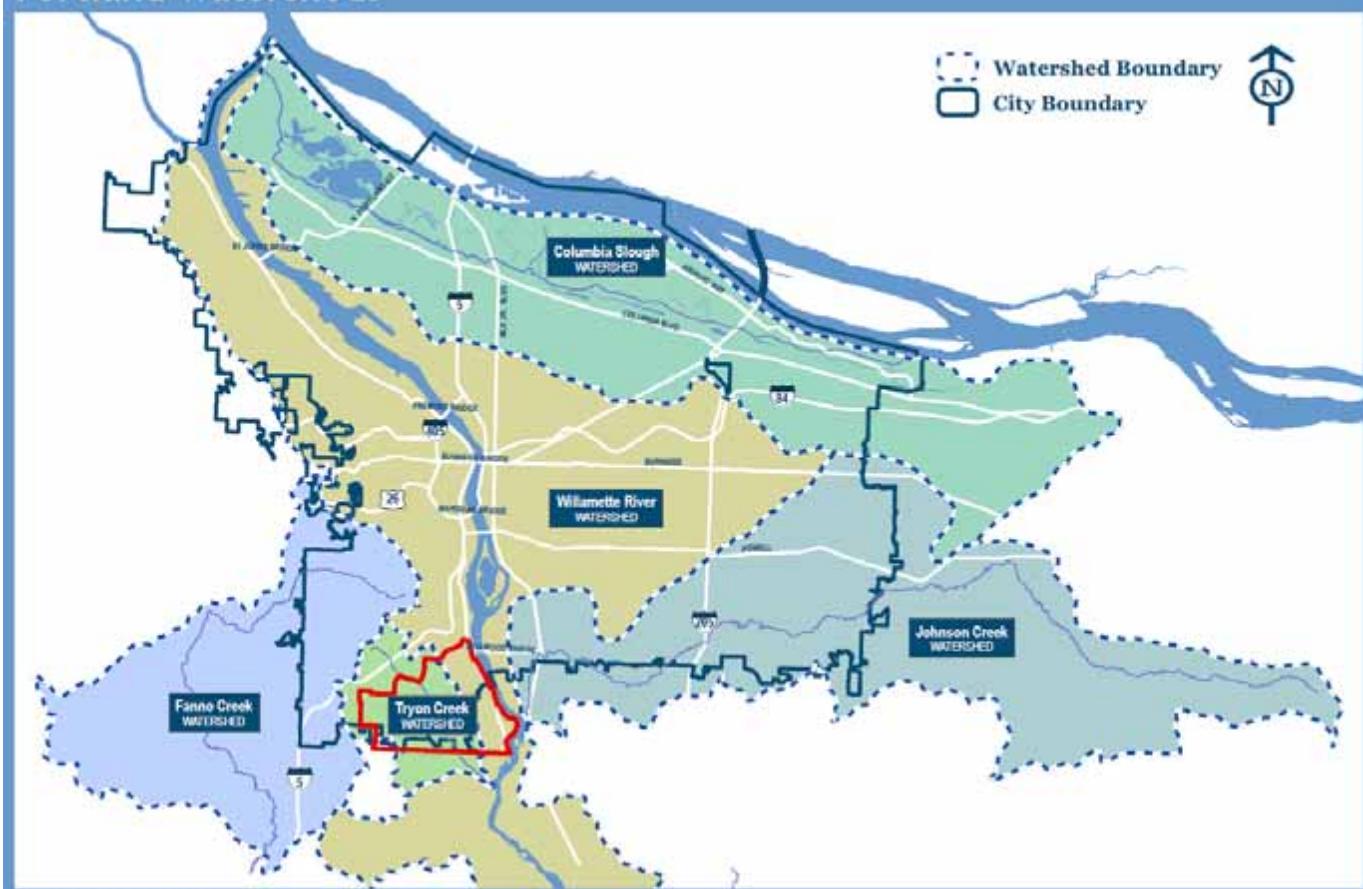


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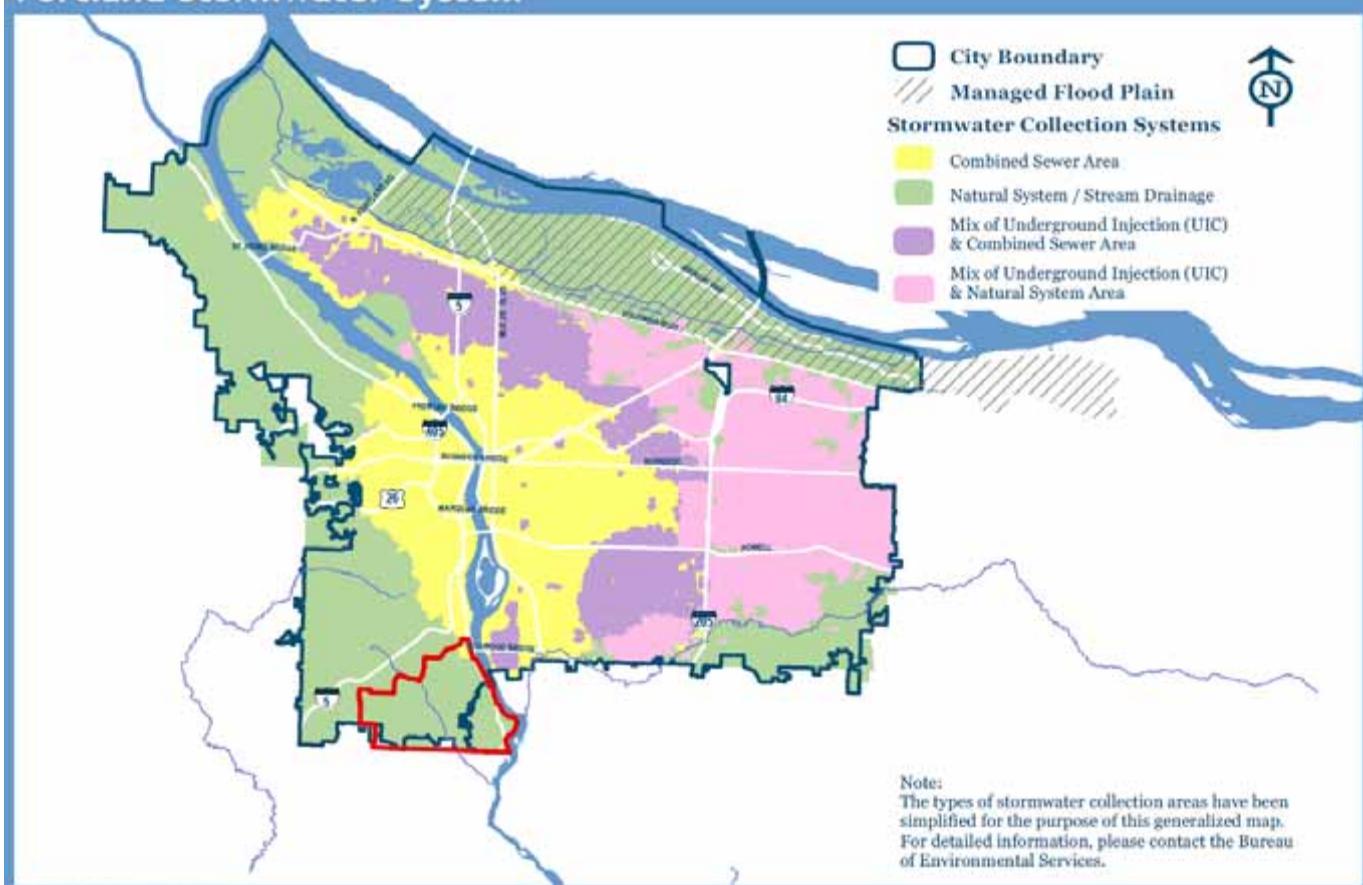


City of Portland-Oregon  
Sam Adams Mayor - Sarah Anderson, Director

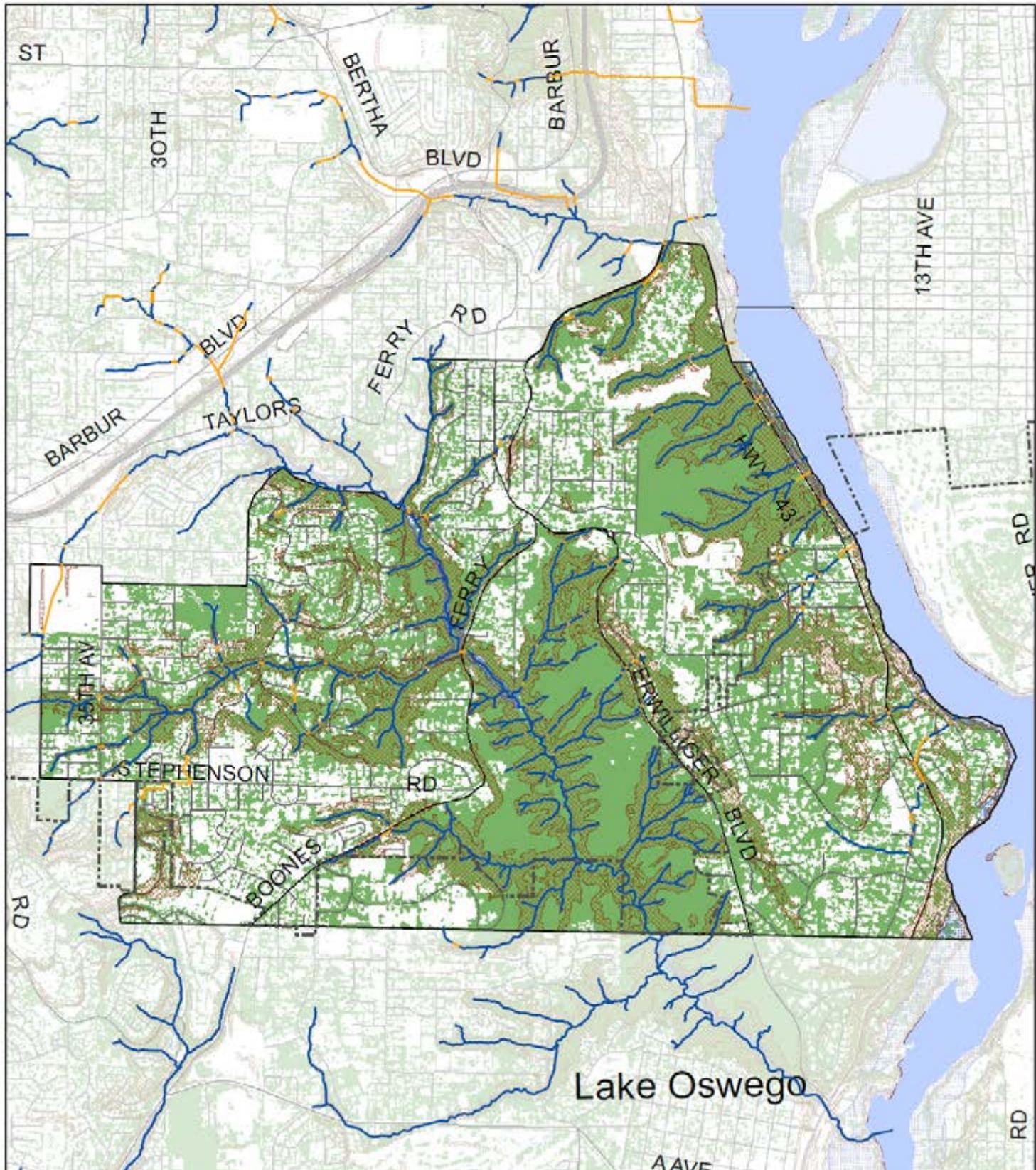
## Portland Watersheds



## Portland Stormwater System



# Tryon Creek-Riverdale Analysis Area



## Watersheds and Natural Features

- Slope Hazard
- High Structure Vegetation
- FEMA 100-year floodplain
- Waterbodies
- Open channel stream
- Piped/culverted stream
- City Boundary

August 9, 2011

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City of Portland, Oregon  
Sam Adams, Mayor - Stacie Anderson, Director

# Tryon Creek-Riverdale Analysis Area

## Demographics (2000 – 2010)

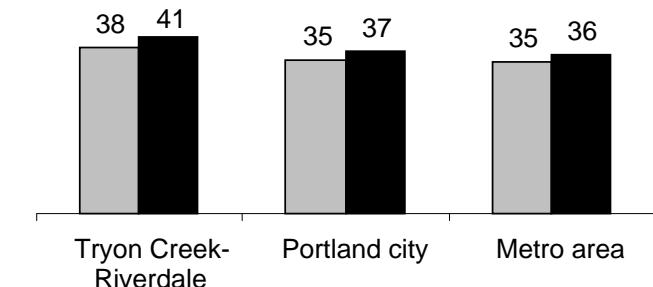
ESRI Business Analyst and US Census 2010 (except as noted)

### Population

	Tryon Creek-Riverdale	Portland city	Metro area
2010	9,668	583,776	2,226,009
2000	8,884	529,121	1,927,881
% change	9%	10%	15%

■ 2000 ■ 2010

### Median Age

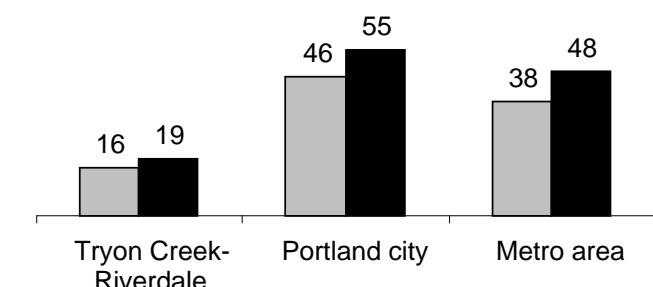


### Average Household Size

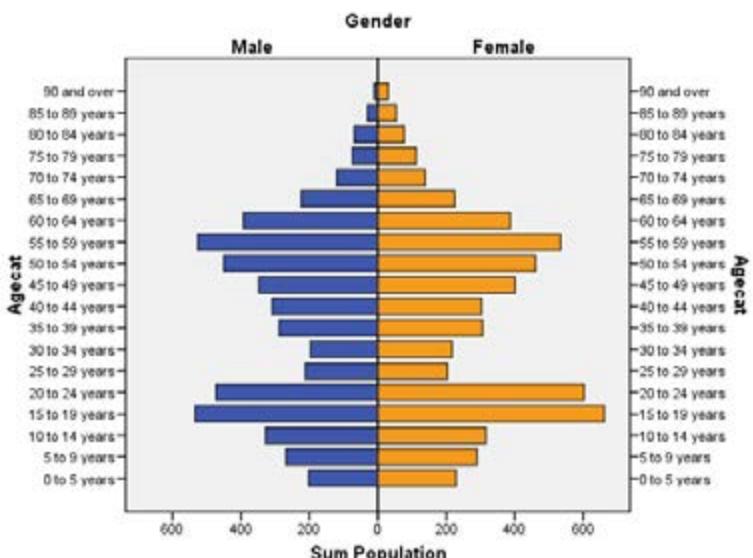


### Diversity Index

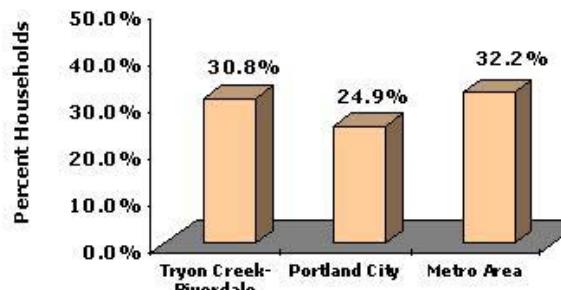
(Measures the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups)



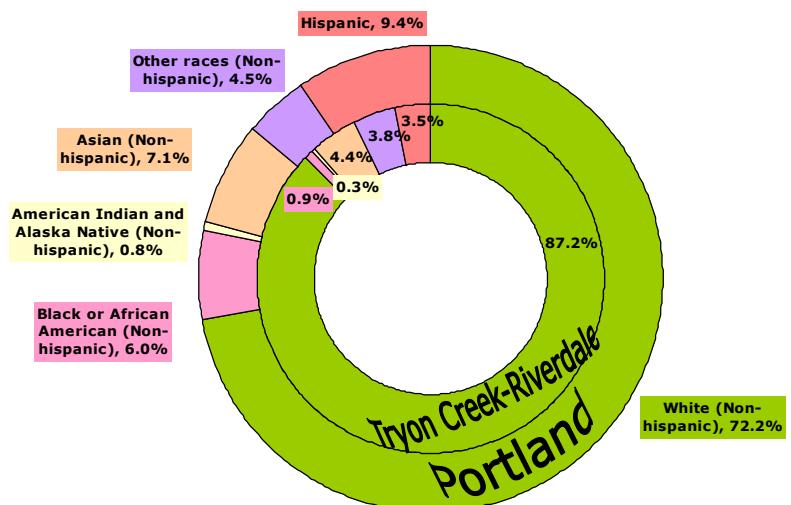
Population Pyramid for Tryon Creek-Riverdale, 2010



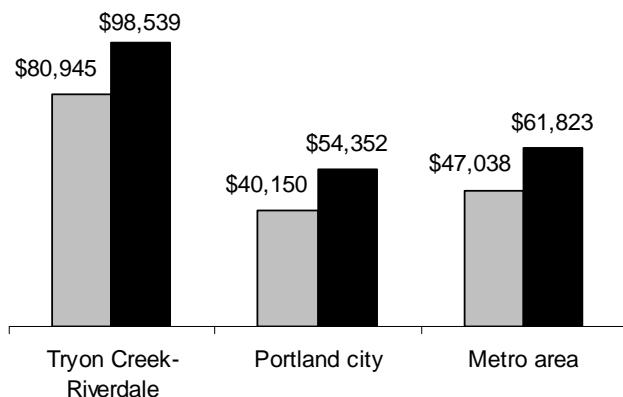
Households with Children Under 18 Years: 2010



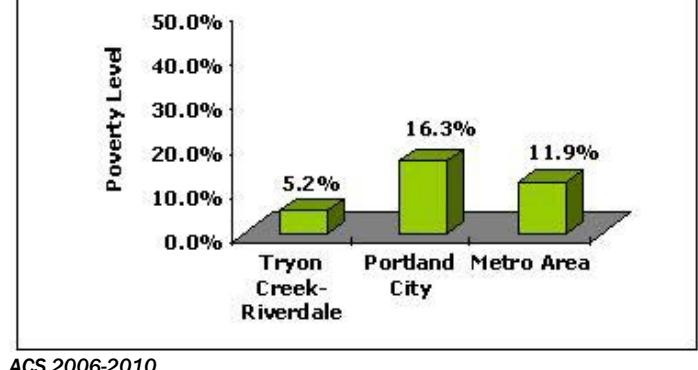
Racial and Ethnic Distribution in Portland vs. Tryon Creek-Riverdale



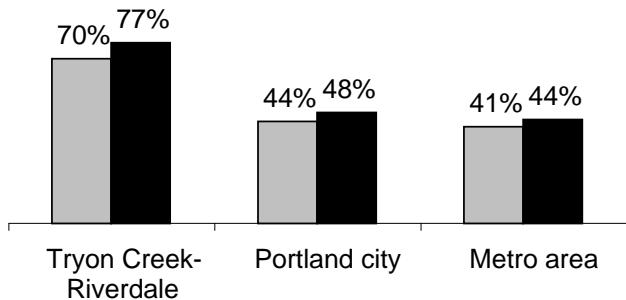
## Median Household Income



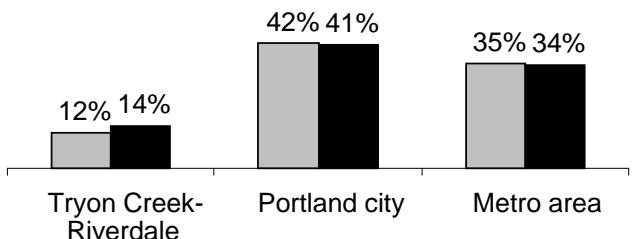
## Percent Below Poverty: 2010



## Percent College Graduates



## Percent Renters of Occupied Housing Units



## Median Home Value

	Tryon Creek-Riverdale	Portland city	Metro area
2010	\$440,625	\$253,184	\$273,500
2000	\$264,076	\$154,721	\$168,347
% change	66.9%	63.6%	62.5%

# Tryon Creek-Riverdale Analysis Area

## Commercial Real Estate Indicators

Retail and Commercial Real Estate data through 9-16-2010  
 Source: COSTAR

### RETAIL

#### Square Feet

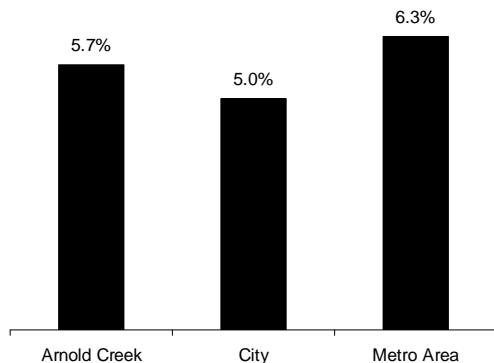
Tryon Creek	City	Metro Area
110,895	51,937,895	107,875,146

### OFFICE SPACE

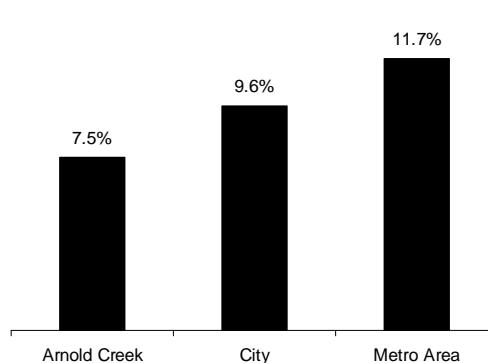
#### Square Feet

Tryon Creek	City	Metro Area
42,569	54,348,765	92,465,455

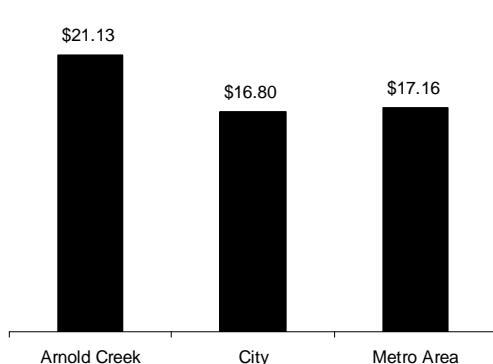
#### Retail Vacancy



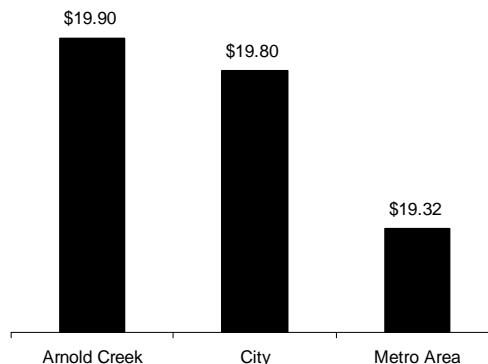
#### Office Vacancy



#### Retail Rents



#### Office Rents



# Tryon Creek-Riverdale Analysis Area

## Retail Market Profile

**Retail Gap = \$140 million**

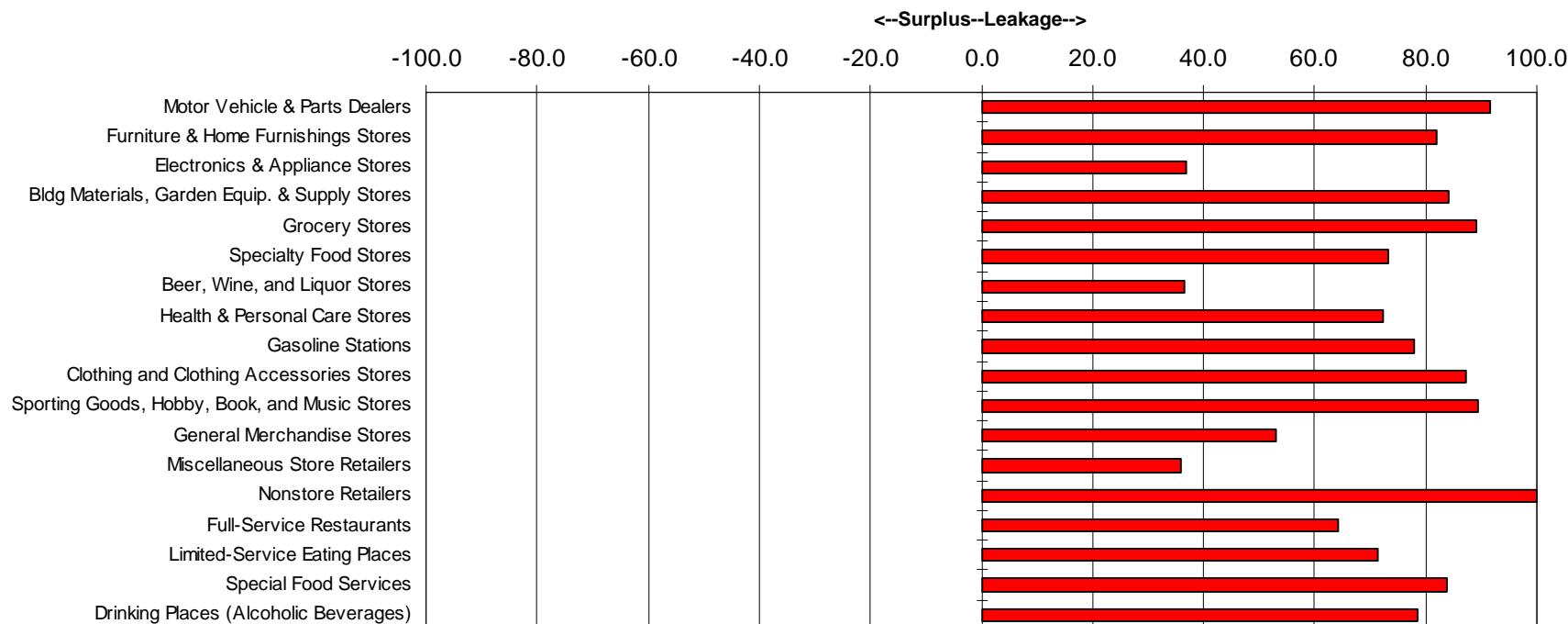
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / LEAKAGE Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$162,069,729	\$21,887,396	\$140,182,333	76.2	52
Total Retail Trade (NAICS 44-45)	\$138,653,804	\$17,938,651	\$120,715,153	77.1	43
Total Food & Drink (NAICS 722)	\$23,415,925	\$3,948,745	\$19,467,180	71.1	9

The “Retail Gap” is the difference between the potential spending in an area, based on population, and the capacity of that area’s retail stores to meet the potential.

In an area where retail potential is greater than retail sales, the excess retail demand (a positive number) “leaks” to other areas, thus “leakage.”

Demand in an area that is lower than the available supply (thus a negative number) is considered a surplus of supply, or “surplus.”

(Source: ESRI Business Analyst)



# Tryon Creek-Riverdale Analysis Area

## Employment

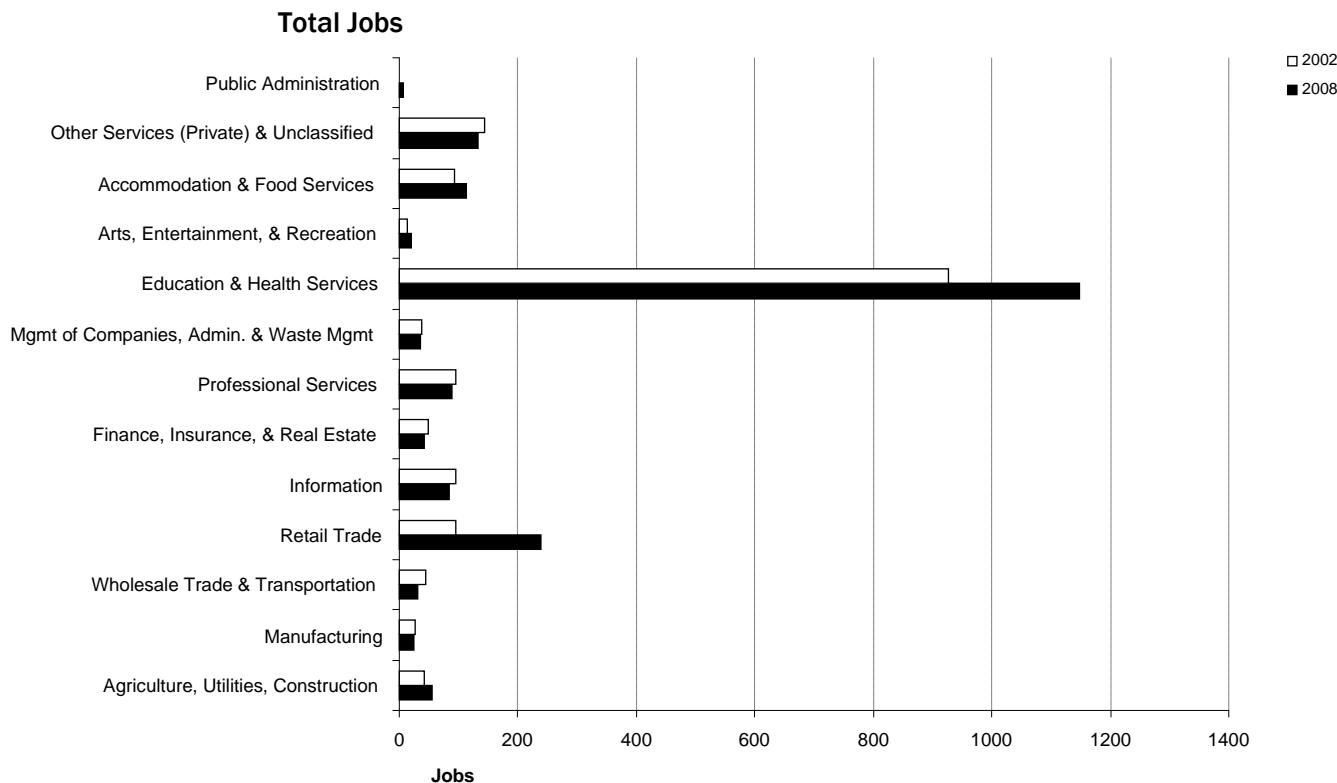
Quarterly Census of Employment and Wages data for 2002 & 2008

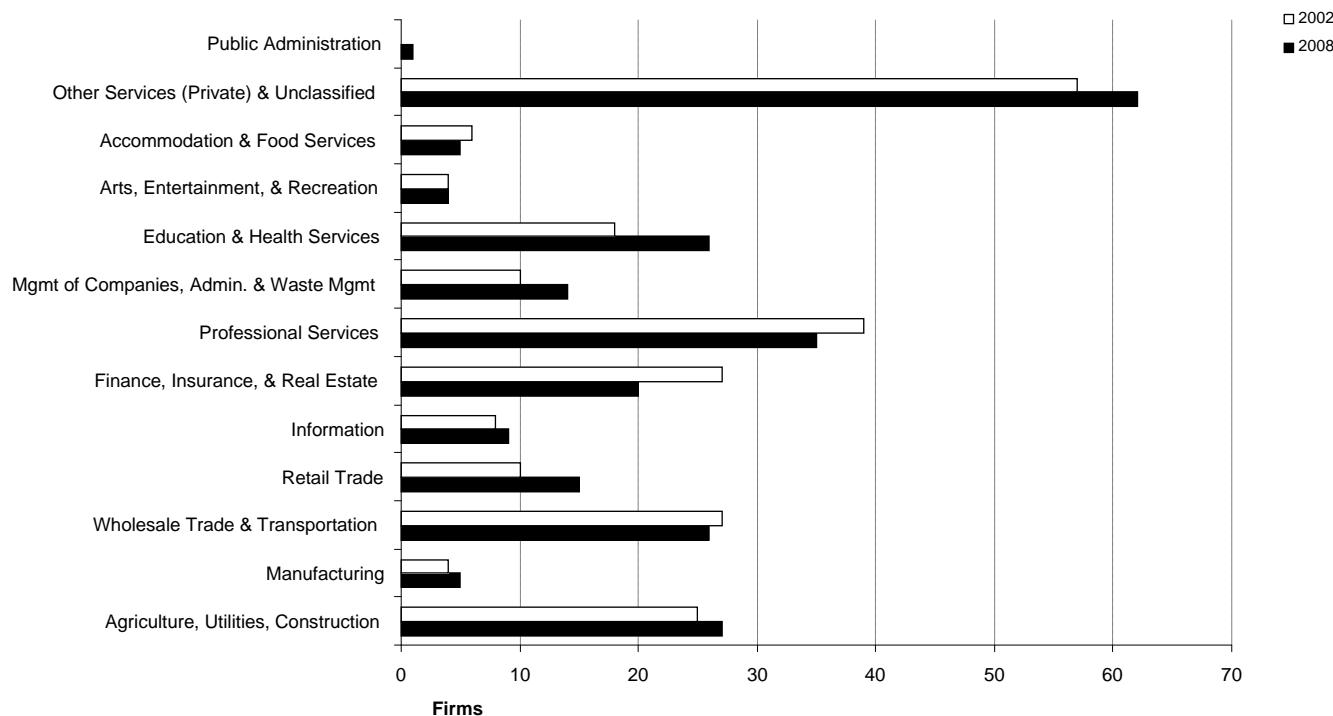
Source: Oregon Employment Department (OED)

*This employment data is derived from quarterly tax reports submitted to State Employment Security Agencies by employers subject to State unemployment insurance (UI) laws and from Federal agencies subject to the Unemployment Compensation for Federal Employees (UCFE) program.*

*Note: These figures represent the jobs located within the geography. Employment figures should be used with care, as they are based on the addresses of firms or public agencies, and may not reflect where jobs are actually located. For example, the address may identify the location of administrative offices or a mailing address, while job locations may be located in other locations, as is sometimes the case with school districts or firms with dispersed operations.*

	2002	2008	change
Total Jobs	1,660	2,020	+360
Total Firms	235	249	+14
Average Annual Wages	\$35,002	\$41,365	+6,362



**Total Firms****Average Annual Wages**