

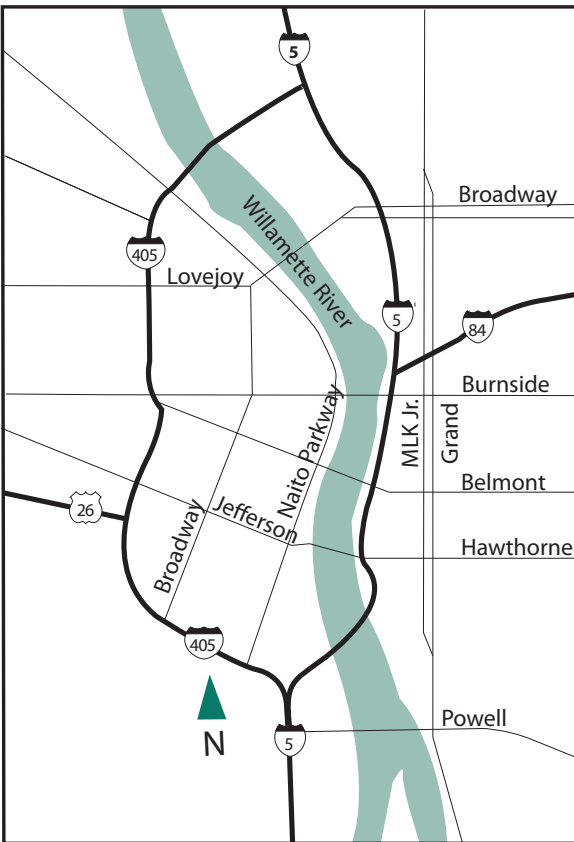


Clean & Safe District

2012 Downtown Portland Business Census & Survey

The 2012 Downtown Portland Business Census & Survey Executive Summary

Overview



The Downtown Business Census & Survey is a comprehensive data-gathering project involving all downtown Portland businesses, government entities and non-profit organizations. The purpose of this project is: 1) to accurately identify and count all the businesses and their employees located in the downtown area; 2) to obtain feedback and responses from all downtown firms and organizations in order to better understand and respond to the existing downtown market, as well as future opportunities and challenges facing the market; 3) to establish benchmarks and trends of leading economic indicators for tracking the progress of ongoing downtown development efforts; and 4) to create a sophisticated resource of information for prospective downtown tenants and developers interested in having a downtown presence. The census measures all enterprises and all employees physically located within the I-405/I-5 loop.

For more information please contact:

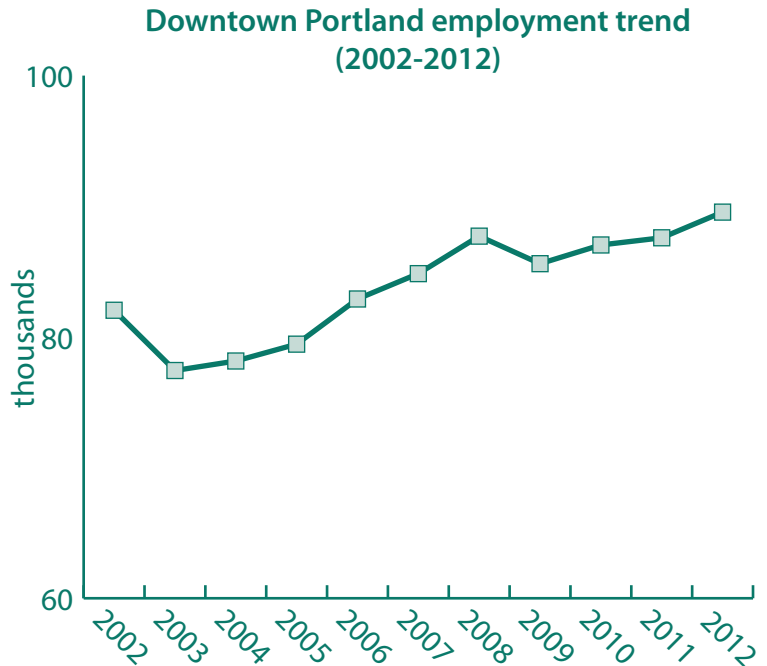
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Census Results

The 2012 Downtown Business Census reveals that **3,915** businesses, organizations and governmental entities were located within the I-5/I-405 loop as of October 1, 2012, the annual baseline for the analysis. The Downtown Business Census concludes there to be **89,552** employees located within that same area.

Downtown Portland Employees by Industry Sector

Sector	2012	2011	2010
Agriculture	190	199	198
Utilities	641	589	872
Construction	2,795	2,541	2,073
Manufacturing	843	924	839
Wholesale Trade	1,080	1,061	1,141
Retail Trade	4,653	4,398	4,325
Transportations & Warehousing	1,483	1,506	1,887
Information	4,496	4,079	4,240
Finance & Insurance	10,578	10,443	10,667
Real Estate, Renting & Leasing	2,601	2,582	2,608
Prof. Scientific & Technical Services	17,888	17,038	15,710
Mgmt. of Companies & Enterprises	3,803	3,882	3,887
Administrative & Support Services	4,668	4,589	5,028
Educational Services	6,862	6,603	6,809
Health Care & Social Assistance	3,576	3,578	3,241
Arts, Entertainment & Recreation	1,467	1,949	1,886
Accommodation & Food Services	10,645	10,261	10,374
Other Services	3,354	3,312	3,380
Public Administration	7,909	8,035	7,846
Non-Classifiable	20	19	27
Total	89,552	87,588	87,038



Downtown Portland Enterprises by Industry Sector

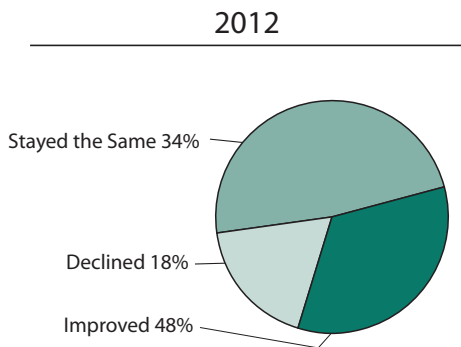
Sector	2012	2011	2010
Agriculture	10	8	9
Utilities	7	8	8
Construction	78	72	77
Manufacturing	65	60	63
Wholesale Trade	139	140	147
Retail Trade	324	310	310
Transportations & Warehousing	37	30	27
Information	150	139	136
Finance & Insurance	335	288	293
Real Estate, Renting & Leasing	219	190	188
Prof. Scientific & Technical Services	1,187	1,137	1,121
Mgmt. of Companies & Enterprises	57	54	50
Administrative & Support	140	125	123
Educational Services	75	65	69
Health Care & Social Assistance	254	218	222
Arts, Entertainment & Recreation	55	56	54
Accommodation & Food Services	420	371	372
Other Services	285	272	285
Public Administration	64	42	40
Non-Classifiable	14	14	21
Total	3,915	3,599	3,615

The Portland Business Alliance has changed its employee and industry count data source for the Downtown Business Census & Survey, effective October 1, 2010. The Alliance, in partnership with the City of Portland and the Portland Development Commission, uses the data of the Oregon Employment Department for employee and industry counts. The purpose of the data source change is to align the Alliance efforts to track and monitor downtown trends with city and regional partners, thereby providing a baseline to measure outcomes of investments and public policy decisions. Despite different employment data collection methodologies, the Alliance historical employment data for years 2002- 2009 trend similar to the Oregon Employment Department data for the same timeframe. Therefore, the Alliance will move forward with the aligned data set without losing historical trend information.

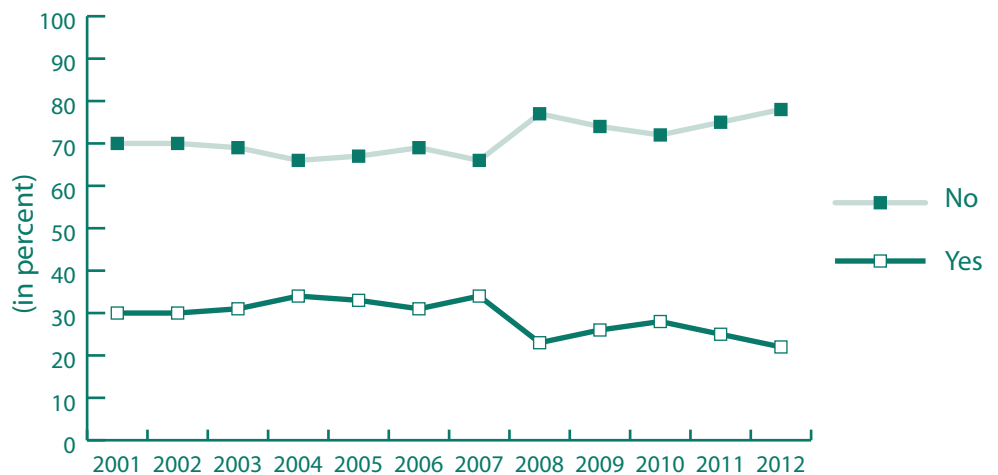
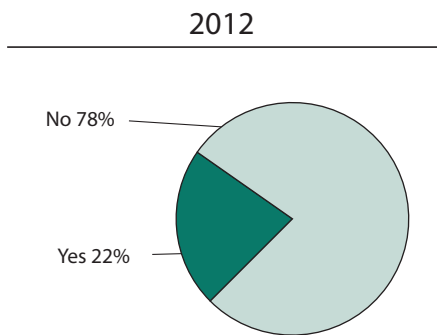
Survey Results

The 2012 Downtown Business Survey reflects the opinions of business owners and managers operating within the downtown area as of October 1, 2012.

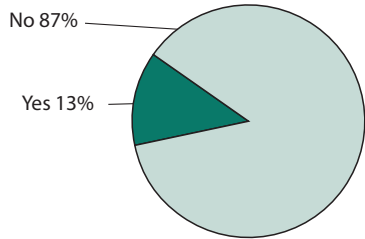
Change in Health of Business Over the Prior Two Years



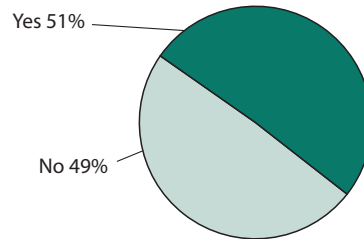
Plans for Expansion Over Next Two Years



Plans for Business Relocation in the Next Two Years

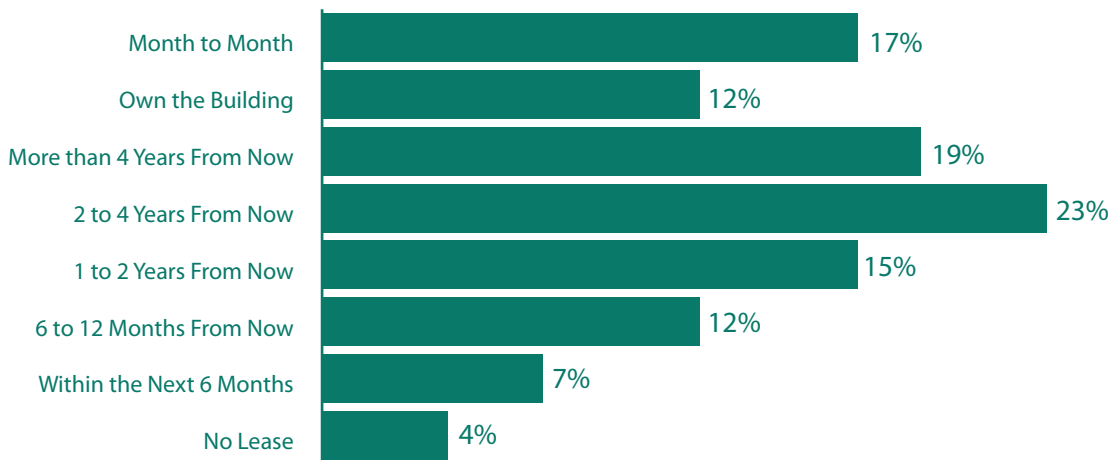


Those That Plan to Relocate Within Downtown Portland



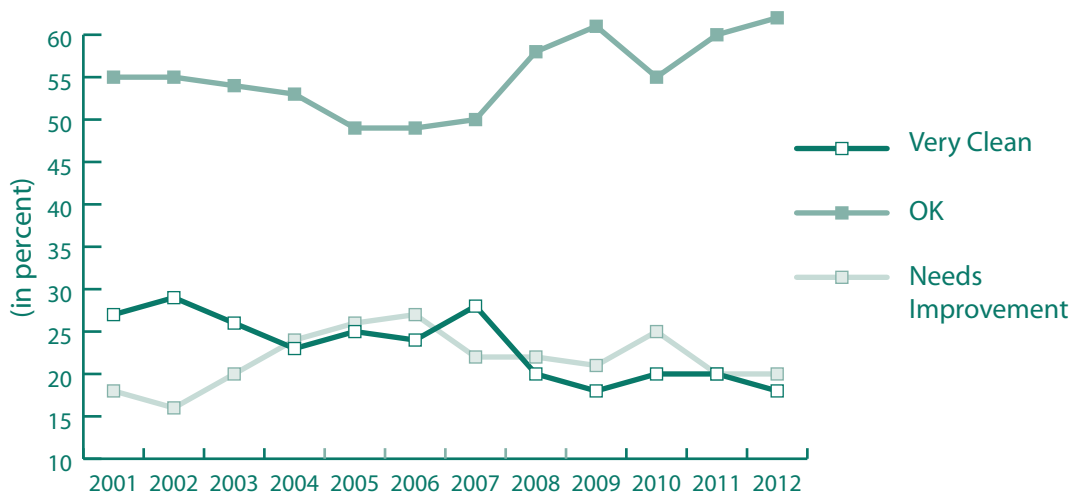
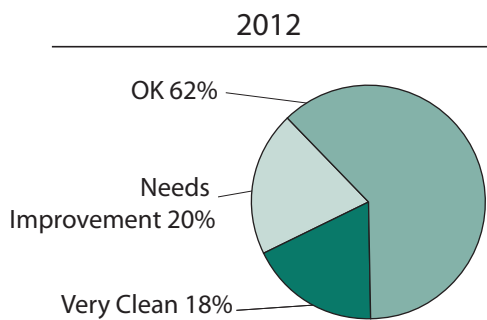
Type Of Occupancy and Lease Expiration

2012

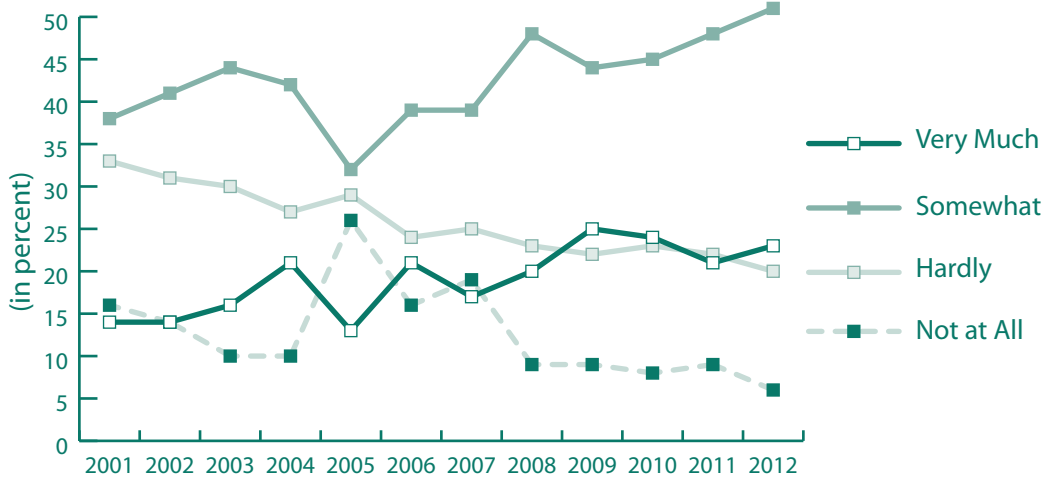
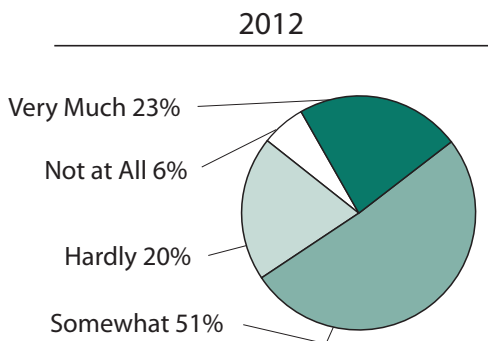


The survey includes inquiries about the perception of cleanliness and safety in the downtown area. The opinions of business owners and managers on these subjects are very important for measuring the impact of the physical business environment.

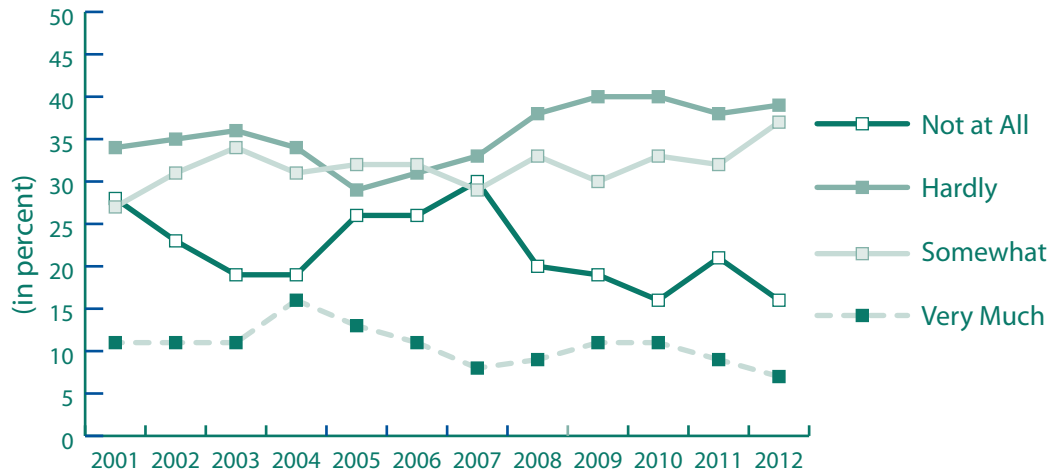
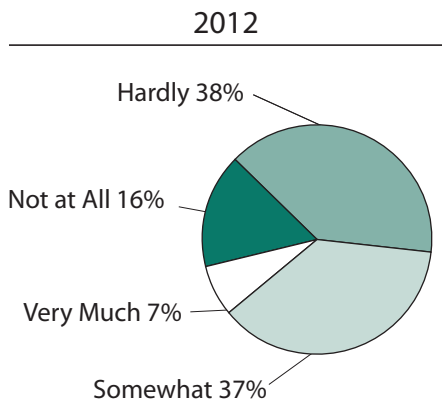
Downtown Cleanliness



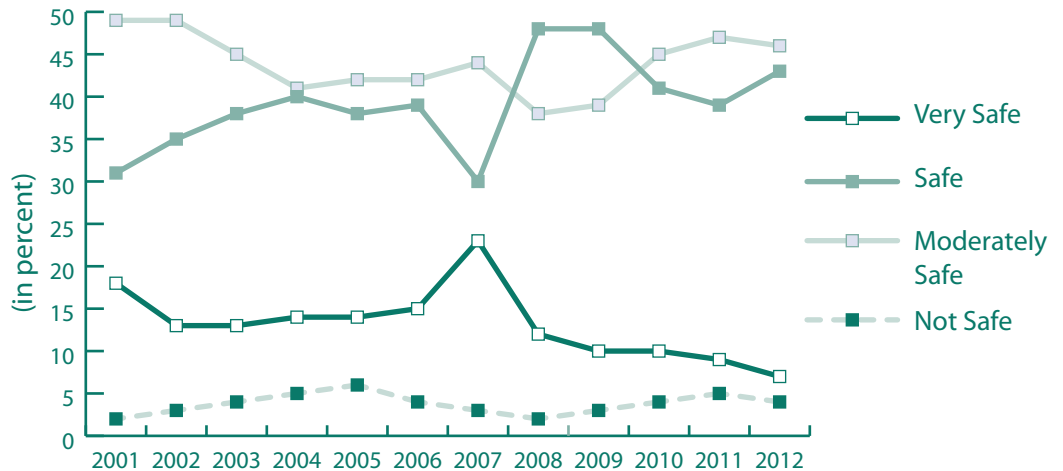
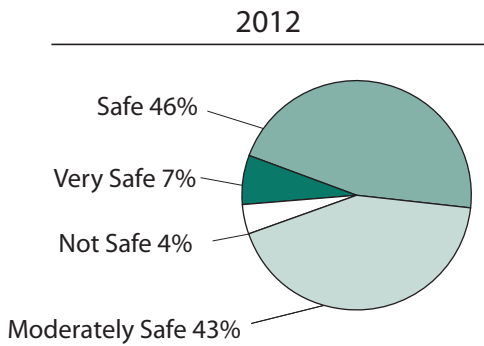
Impact of Panhandlers and Public Inebriates



Effects of Graffiti and Vandalism

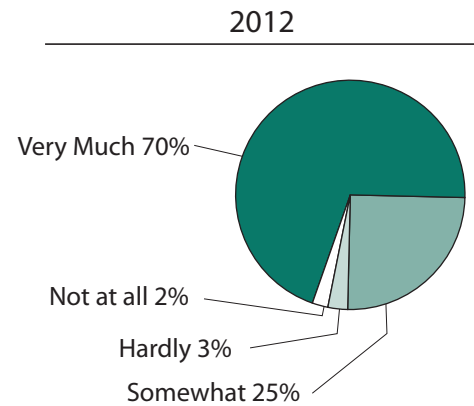


Downtown Safety



Amenity of Downtown Holiday Lighting Program

Respondents were asked to rate the Holiday Lighting Program as a valued amenity for their business.



In order to determine which amenities help attract and retain businesses in the downtown area, owners and managers were asked to list the three factors important to their business being located downtown.

Most Important Factors for Business Locating or Staying Downtown

	2012 % of Respondents	2012 Rank	2011 Rank	2010 Rank	2009 Rank	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank	2001 Rank
Central Location	67%	1	1	1	1	1	1	3	1	3	4	3	4
Public Transportation	51%	2	2	3	3	2	2	1	3	2	2	1	2
Density of People	51%	3	5	--	--	--	--	--	--	--	--	--	--
Proximity to Other Businesses	45%	4	3	2	2	3	--	--	--	--	--	--	--
Accessibility	29%	5	4	4	4	4	3	--	--	--	--	--	--

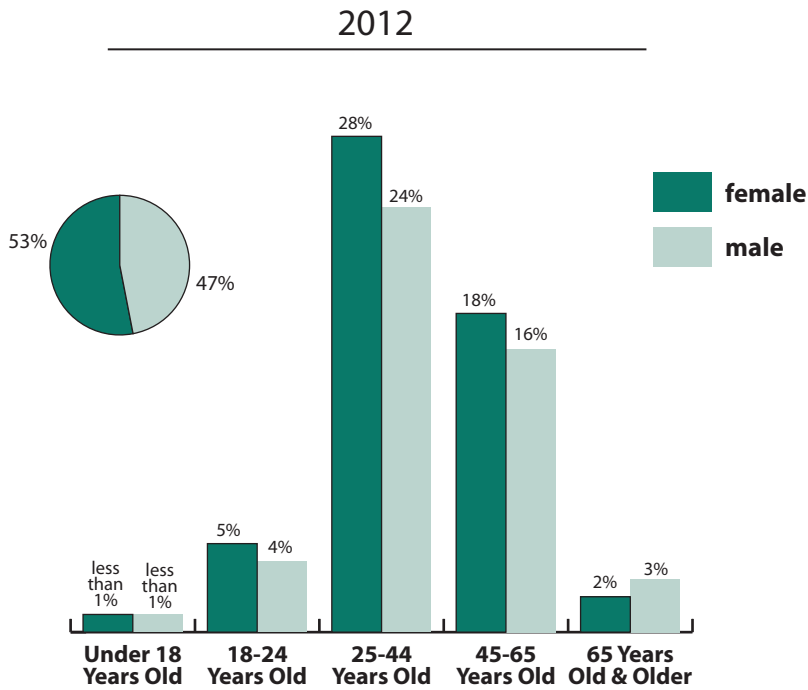
Business owners and managers were also asked to indicate the top three factors needing the most improvement.

Factors that Need Improvement

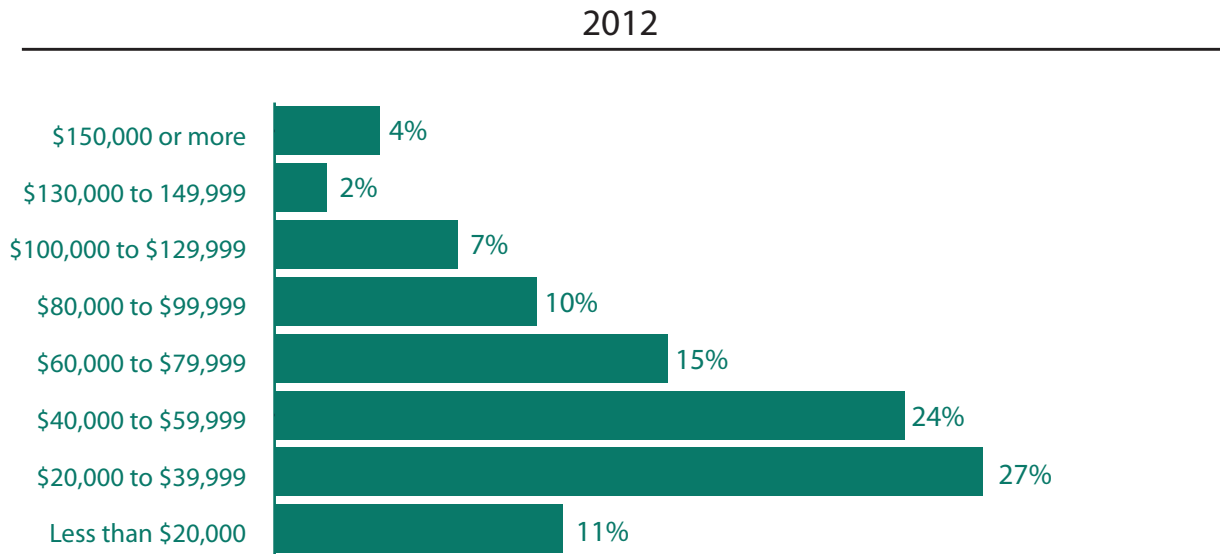
	2012 % of Respondents	2012 Rank	2011 Rank	2010 Rank	2009 Rank	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank	2001 Rank
Panhandlers	56%	1	1	1	1	1	2	1	1	1	1	1	1
Transients	50%	2	2	2	2	2	3	2	2	2	2	2	4
Cost of Parking	39%	3	3	3	3	3	5	4	3	3	4	4	5
Availability of Parking	26%	4	5	5	4	4	4	--	--	--	--	--	--
Taxes	22%	5	4	4	--	--	1	3	--	--	--	--	--

Employee Profile

Employee Age and Gender Distribution

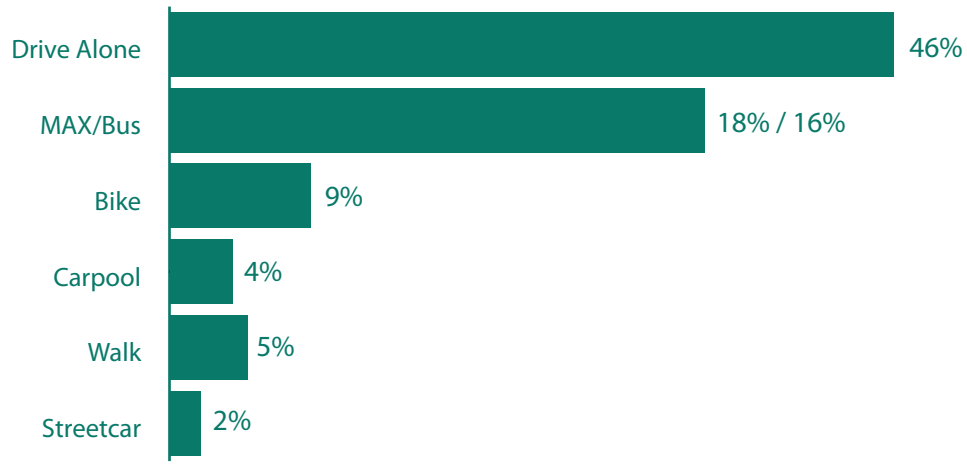


Annual Salaries of Downtown Workforce



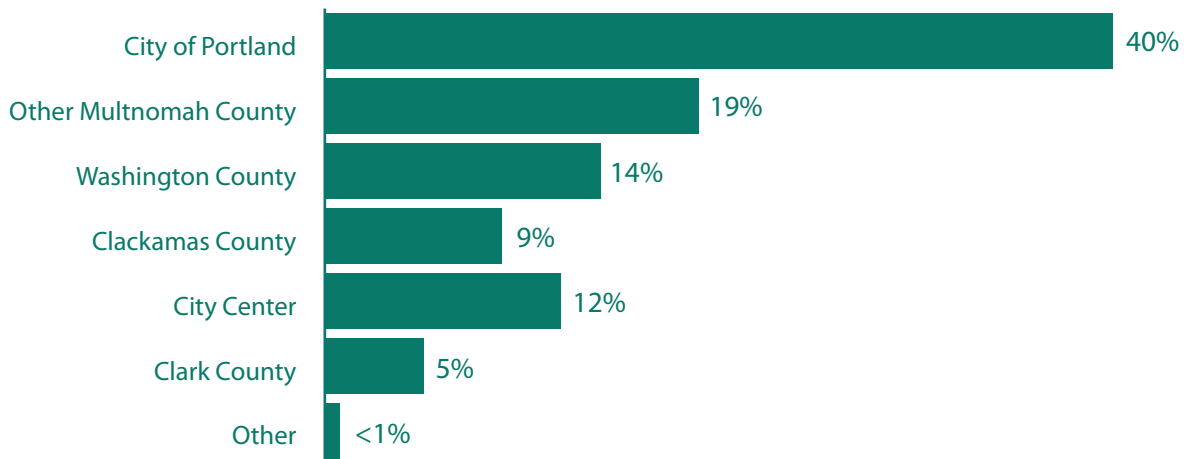
How Downtown Employees Get to Work

2012



Downtown Employee Residences

2012



Business Census Database & Site Analysis

The information for the census is collected by business location, which makes the information useful for business development and competitive analysis. Analysis can be conducted on specific industry segments in downtown or designated geographic locations. Information on individual enterprises will not be released.

Methodology

Business Census employment numbers were provided by the Oregon Employment Department and analyzed by the Portland Development Commission; this is a shift in data collection methodology in past years. The survey instrument was mailed to the owners and managers of all businesses, organizations, and government agencies located within the study area. Those that did not respond to the initial mailing were contacted by phone interview. A statistically significant response (+/-4%) was collected for all other survey questions. The Downtown Business Census & Survey is conducted on an annual basis using October 1 of each year as the baseline date for responses and collected information.

NAICS Categories

The 2002 North American Industry Classification System (NAICS) is used to categorize all of the enterprises. Though information was collected for each geographic location, each enterprise is represented only once in the calculated results. Every enterprise is classified by at least the industry sector (2 digit NAICS code).

NAICS Code Sector

- | | |
|---|--|
| 11 Agriculture, Forestry, Fishing & Hunting | 54 Professional Scientific and Technical Services |
| 22 Utilities | 55 Management of Companies and Enterprises |
| 23 Construction | 56 Administrative and Support, Waste Management and Remediation Services |
| 31-33 Manufacturing | 61 Educational Services |
| 42 Wholesale Trade | 62 Health Care and Social Assistance |
| 44-45 Retail Trade | 71 Arts, Entertainment and Recreation |
| 48-49 Transportations & Warehousing | 72 Accommodation and Food Services |
| 51 Information | 81 Other Services |
| 52 Finance & Insurance | 92 Public Administration |
| 53 Real Estate & Renting & Leasing | 99 Non-Classifiable |

Cleanliness & Safety

When responding to survey questions regarding cleanliness, impact of panhandlers and public inebriates, the effects of vandalism and downtown safety (see pages 7-8 of the survey results), respondents were asked to consider the boundary of the Downtown Portland Clean & Safe District, defined as the area within the boundaries formed by NW and SW Front Avenue on the east; SW Harrison between SW Front and SW 4th; SW 4th between SW Harrison and SW Market; SW Market between SW 4th and SW 9th; SW 9th between SW Market and SW Salmon; SW Salmon between SW 9th and SW 11th; SW 11th between SW Salmon and W Burnside; W Burnside between 11th and 9th; NW 9th between W Burnside and NW Hoyt; NW Hoyt between NW 9th and NW Broadway; and the Broadway Bridge on the north.

