

Greater Portland's
Chamber of Commerce



PORTLAND BUSINESS
ALLIANCE

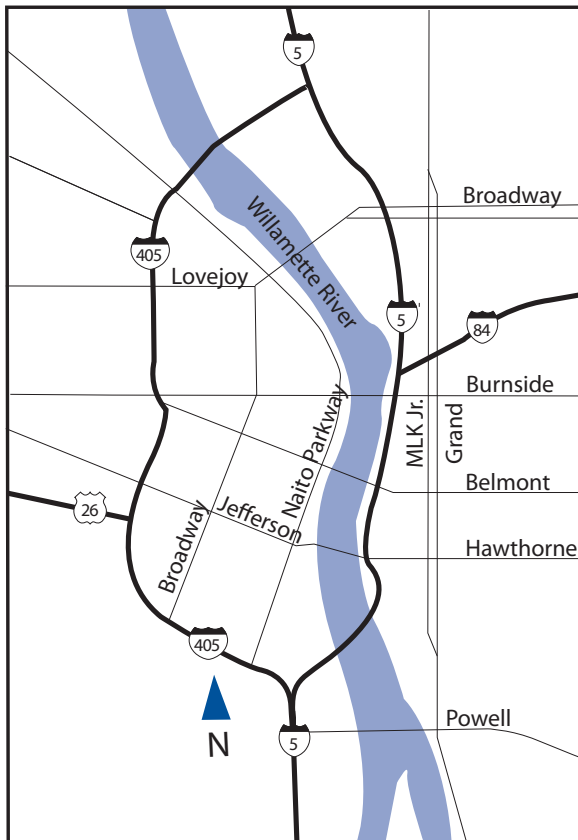
Leading the way

2010 Downtown Portland Business Census & Survey

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The 2010 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:

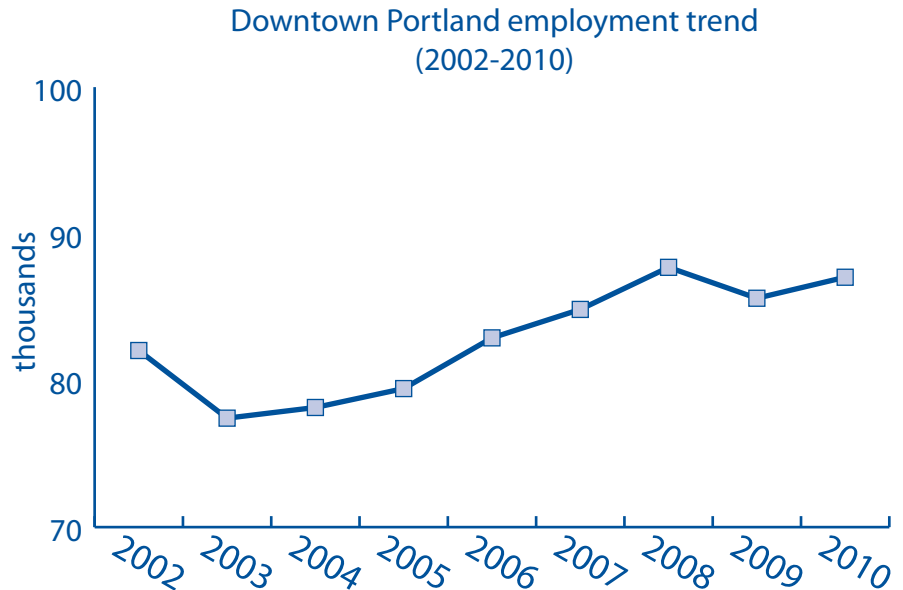
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Census Results

The 2010 Downtown Business Census reveals that 3,615 businesses, organizations and governmental entities were located within the I-5/I-405 loop as of October 1, 2010, the annual baseline for the analysis. The Downtown Business Census concludes there to be 87,038 employees located within that same area.

Downtown Portland Employees by Industry Sector

Sector	2010
Agriculture	198
Utilities	872
Construction	2,073
Manufacturing	839
Wholesale Trade	1,141
Retail Trade	4,325
Transportations & Warehousing	1,887
Information	4,240
Finance & Insurance	10,667
Real Estate, Renting & Leasing	2,608
Prof. Scientific & Technical Services	15,710
Management of Companies & Enterprises	3,887
Administrative & Support Services	5,028
Educational Services	6,809
Health Care & Social Assistance	3,241
Arts, Entertainment & Recreation	1,886
Accommodation & Food Services	10,374
Other Services	3,380
Public Administration	7,846
Non-Classifiable	27
Total	87,038+



Downtown Portland Enterprises by Industry Sector

Sector	2010
Agriculture	9
Utilities	8
Construction	77
Manufacturing	63
Wholesale Trade	147
Retail Trade	310
Transportations & Warehousing	27
Information	136
Finance & Insurance	293
Real Estate, Renting & Leasing	188
Prof. Scientific & Technical Services	1,121
Management of Companies & Enterprises	50
Administrative & Support	123
Educational Services	69
Health Care & Social Assistance	222
Arts, Entertainment & Recreation	54
Accommodation & Food Services	372
Other Services	285
Public Administration	40
Non-Classifiable	21
Total	3,615+

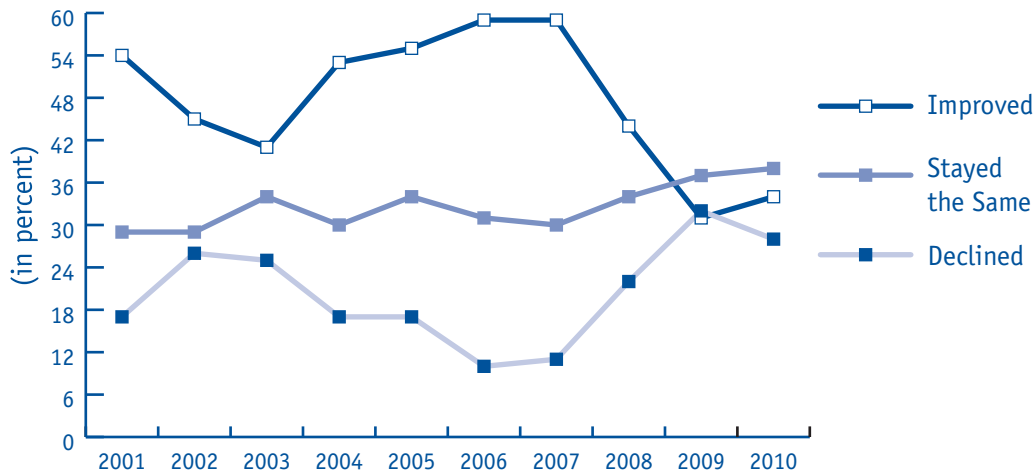
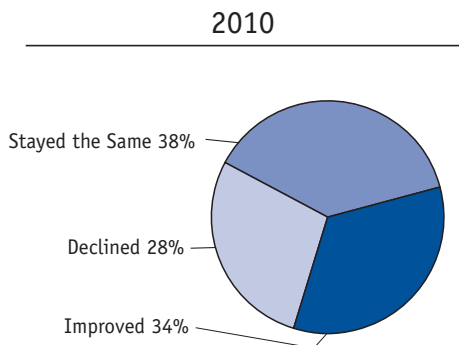
The Portland Business Alliance has changed its employee and industry count data source for the Downtown Business Census & Survey, effective October 1, 2010. The Alliance, in partnership with the City of Portland and the Portland Development Commission, uses the data of the Oregon Employment Department 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.

+ Indicates change in data source from past years. See Methodology section on page 11 for details.

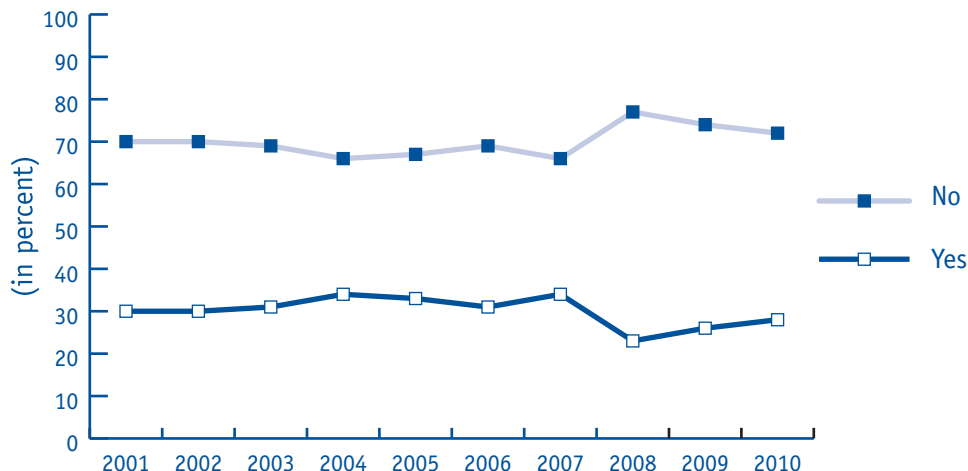
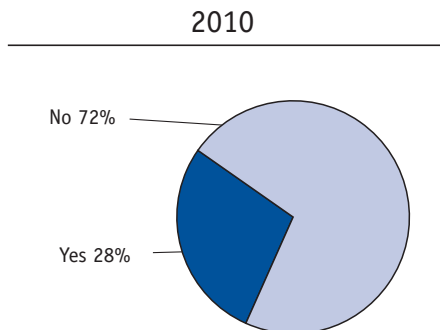
Survey Results

The 2010 Downtown Business Survey reflects the opinions of business owners and managers operating within the downtown area as of October 1, 2010.

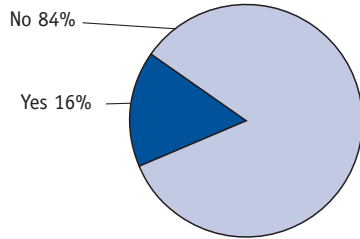
Change in Health of Business Over the Prior Two Years



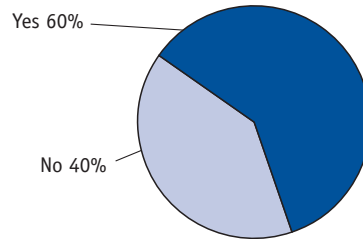
Plans for Expansion Over Next Two Years



Plans for Business Relocation in the Next Two Years

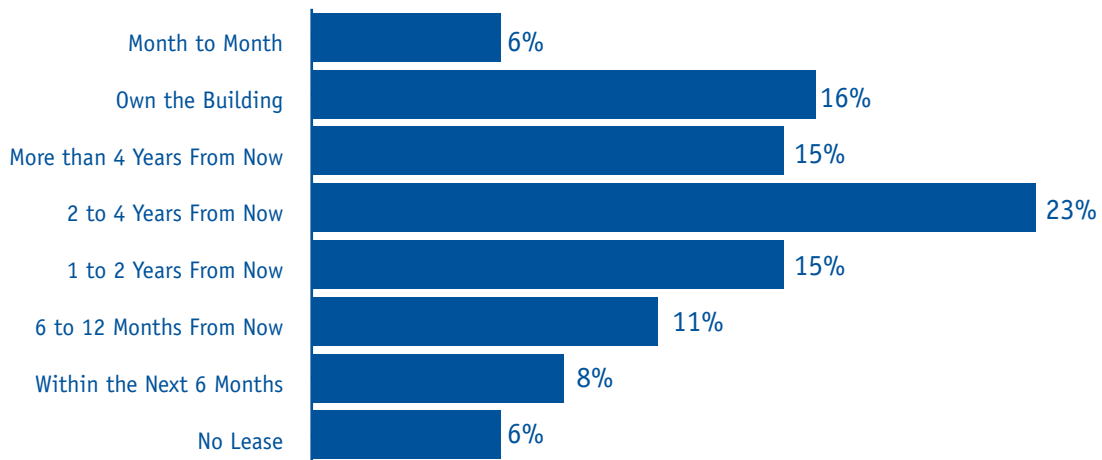


Those That Plan to Relocate Within Downtown Portland



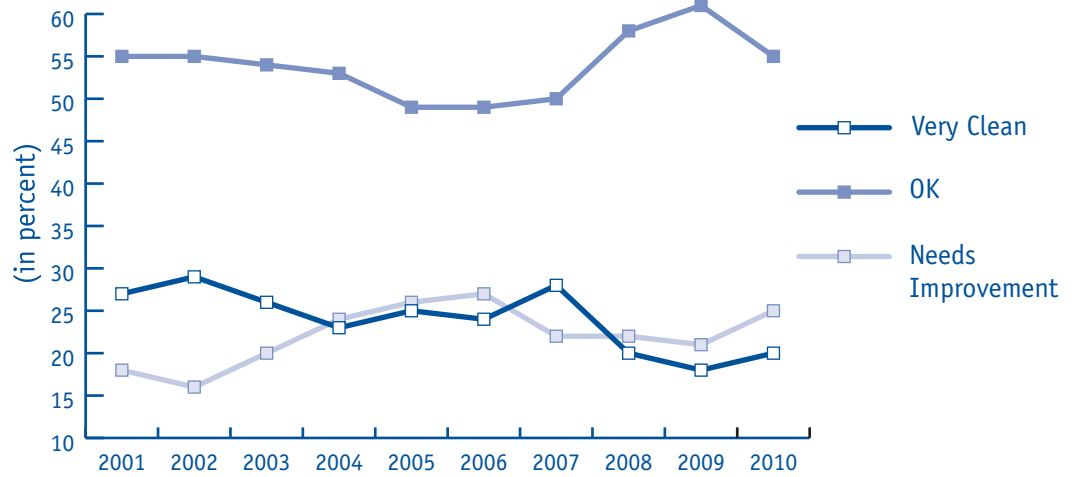
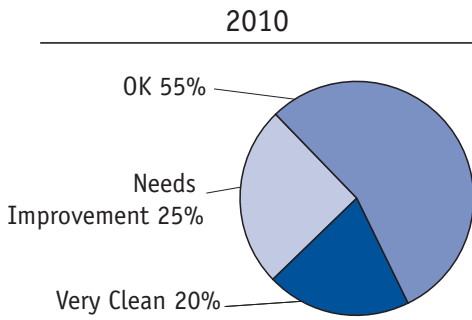
Type Of Occupancy and Lease Expiration

2010

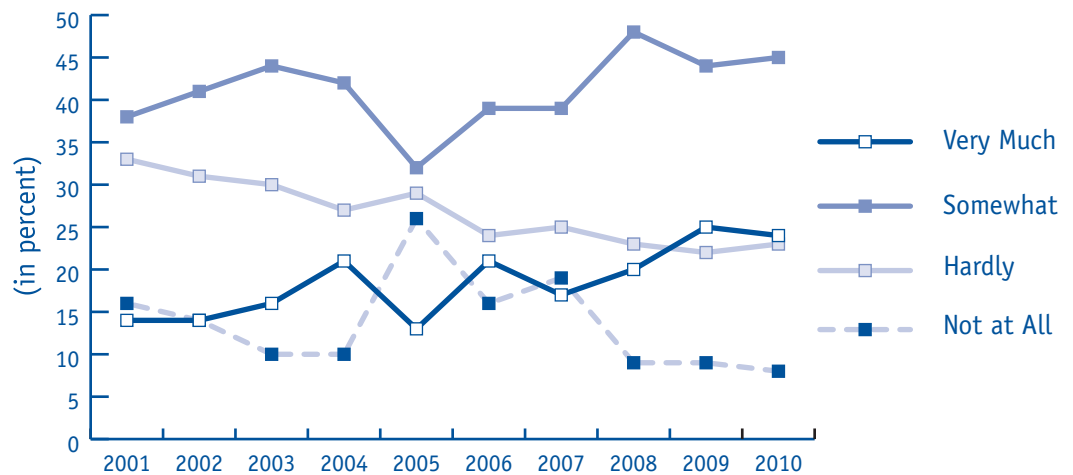
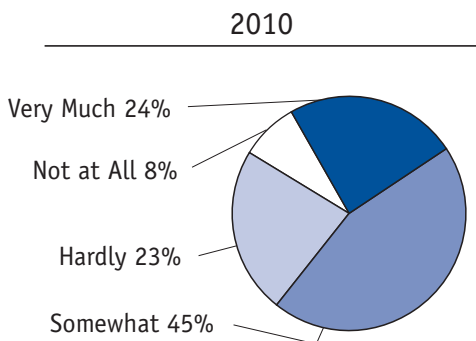


The survey includes inquiries about the perception of cleanliness and safety in the downtown area. The opinions of business owners and managers on these subjects are very important for measuring the impact of the physical business environment.

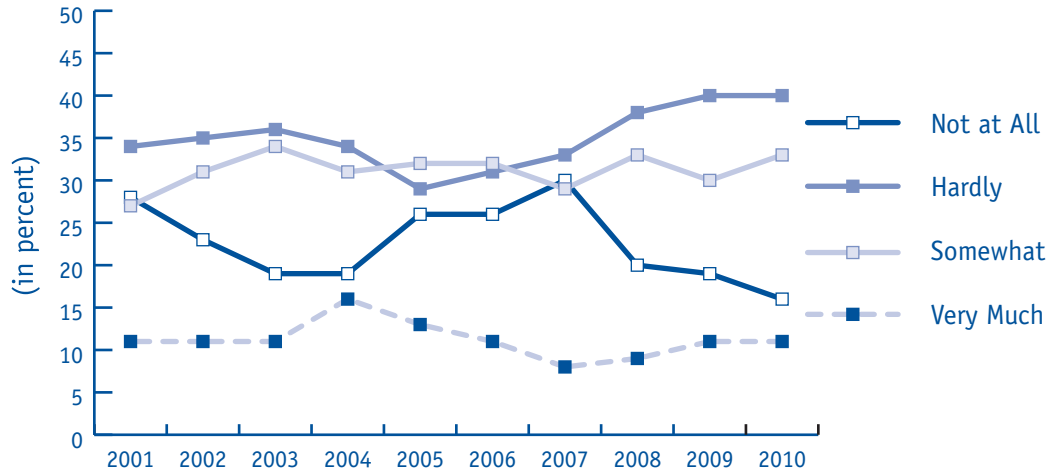
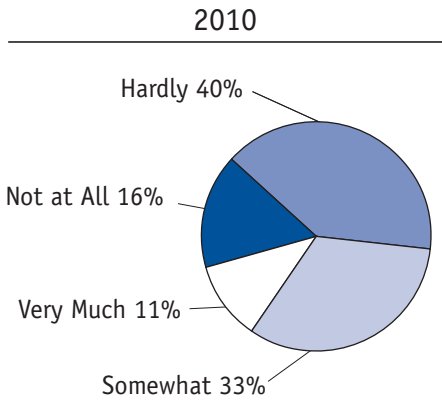
Downtown Cleanliness



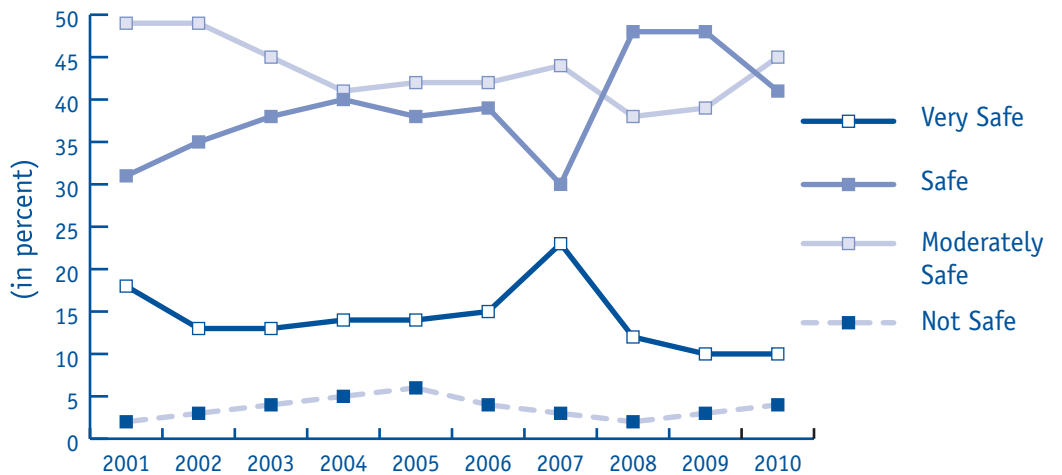
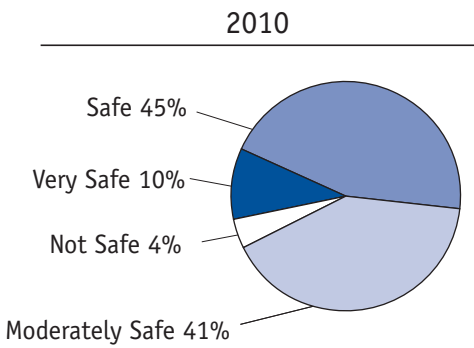
Impact of Panhandlers and Public Inebriates



Effects of Graffiti and Vandalism

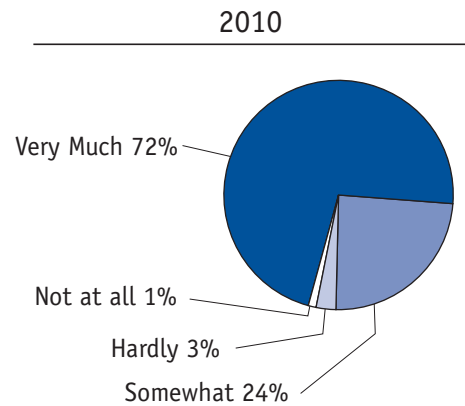


Downtown Safety



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

	2010 % of Respondents	2010 Rank	2009 Rank	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank	2001 Rank
Central Location	64%	1	1	1	1	3	1	3	4	3	4
Proximity to Other Businesses	49%	2	2	3	--	--	--	--	--	--	--
Public Transportation	44%	3	3	2	2	1	3	2	2	1	2
Accessibility	26%	4	4	4	3	--	--	--	--	--	--
Customer Base	15%	5	--	--	--	--	--	--	--	--	--

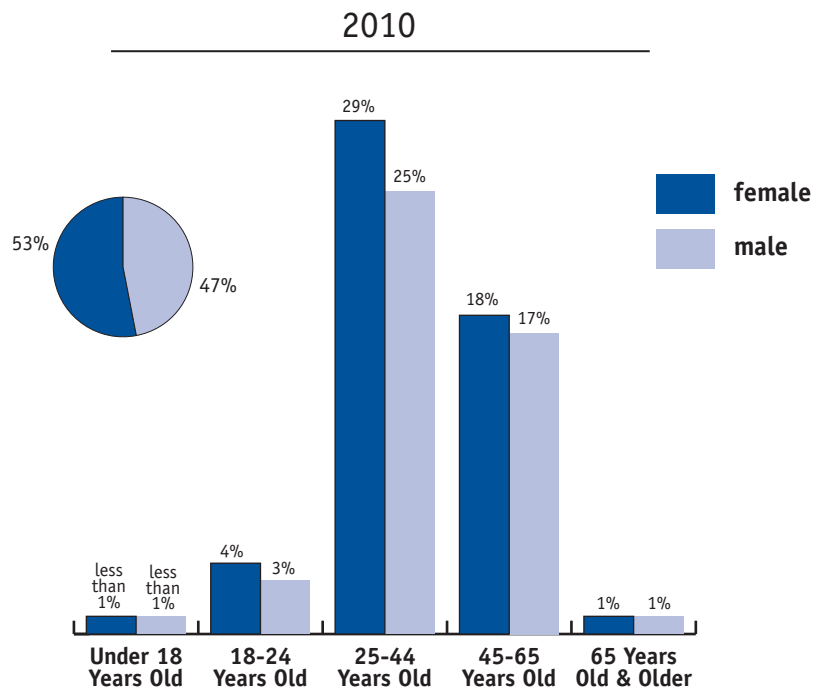
Business owners and managers were also asked to indicate the top three factors needing the most improvement.

Factors that Need Improvement

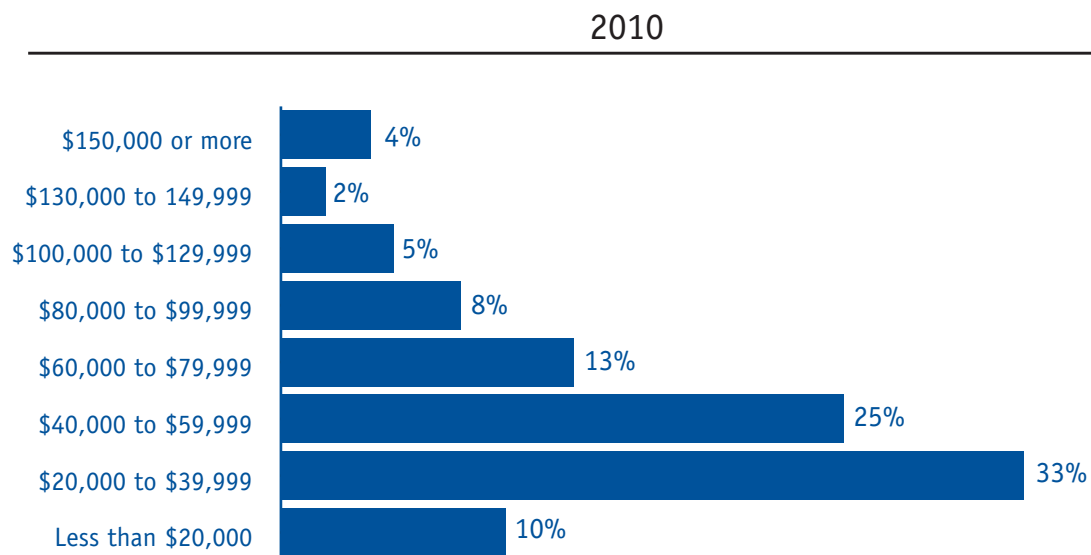
	2010 % of Respondents	2010 Rank	2009 Rank	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank	2001 Rank
Panhandlers	54%	1	1	1	2	1	1	1	1	1	1
Transients	44%	2	2	2	3	2	2	2	2	2	4
Cost of Parking	39%	3	3	3	5	4	3	3	4	4	5
Taxes	20%	4	--	--	1	3	--	--	--	--	--
Availability of Parking	19%	5	4	4	4	--	--	--	--	--	--

Employee Profile

Employee Age and Gender Distribution

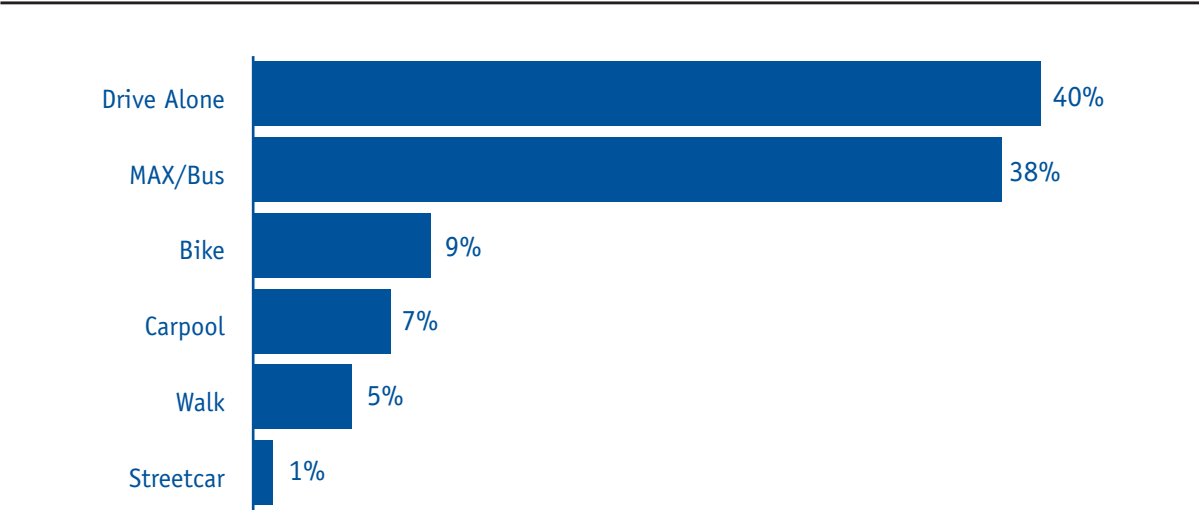


Annual Salaries of Downtown Workforce



How Downtown Employees Get to Work

2010



Downtown Employee Residences

2010

