



# Clean & Safe

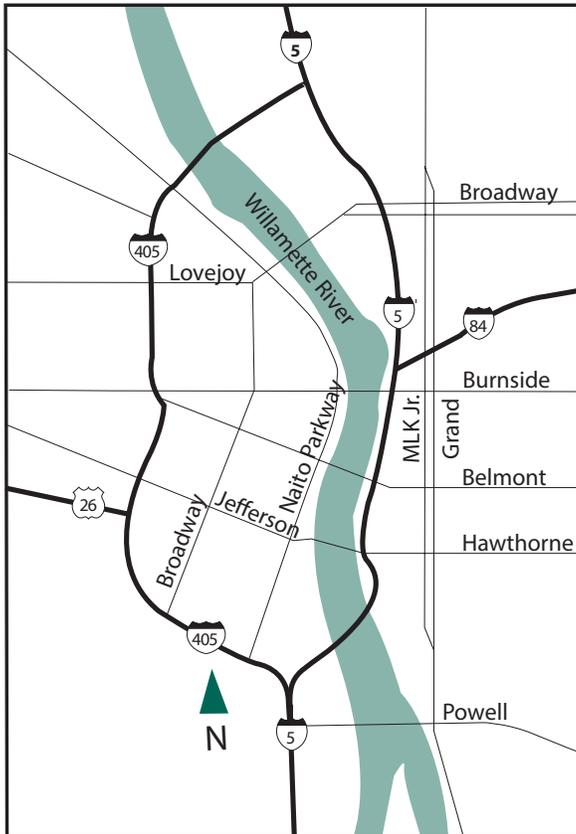
[www.cleanandsafepdx.com](http://www.cleanandsafepdx.com)

## **2015 Downtown Portland Business Census & Survey**

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# 2015 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 2015 Downtown Business Census reveals that **4,770** businesses, organizations and governmental entities were located within the I-5/I-405 loop as of October 1, 2015, the annual baseline for the analysis. The Downtown Business Census concludes there to be **97,281** employees located within that same area.

## Downtown Portland Employees by Industry Sector

Sector	2015	2014	2013	2012	2011	2010
Agriculture	225	196	191	190	199	198
Mining	5	1	-	-	-	-
Utilities	560	633	623	641	589	872
Construction	2,824	3,150	3,204	2,795	2,541	2,073
Manufacturing	1,102	924	825	843	924	839
Wholesale Trade	1,054	1,015	1,111	1,080	1,061	1,141
Retail Trade	4,979	5,179	4,965	4,653	4,398	4,325
Trans. & Warehousing	1,492	1,453	1,404	1,483	1,506	1,887
Information	5,667	5,367	5,069	4,496	4,079	4,240
Finance & Insurance	11,001	10,833	10,486	10,578	10,443	10,667
Real Estate, Renting & Leasing	2,798	2,762	2,579	2,601	2,582	2,608
Prof. Scientific & Tech.Services	20,444	19,493	18,573	17,888	17,038	15,710
Mgmt. of Companies	4,996	4,532	4,075	3,803	3,882	3,887
Admin. & Support Services	5,618	5,259	5,430	4,668	4,589	5,028
Educational Services	7,488	7,403	6,875	6,862	6,603	6,809
Health Care & Social Assist.	4,138	3,867	3,736	3,576	3,578	3,241
Arts, Entertainment & Rec.	1,780	1,872	1,685	1,467	1,949	1,886
Accommodation & Food Serv.	10,659	10,492	10,222	10,645	10,261	10,374
Other Services	3,409	3,433	3,238	3,354	3,312	3,380
Public Administration	7,023	7,073	7,177	7,909	8,035	7,846
Non-Classifiable	19	0	1	20	19	27
<b>Total</b>	<b>97,281</b>	<b>94,937</b>	<b>91,469</b>	<b>89,552</b>	<b>87,588</b>	<b>87,038</b>

*The Portland Business Alliance 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.*

## Downtown Portland Enterprises by Industry Sector

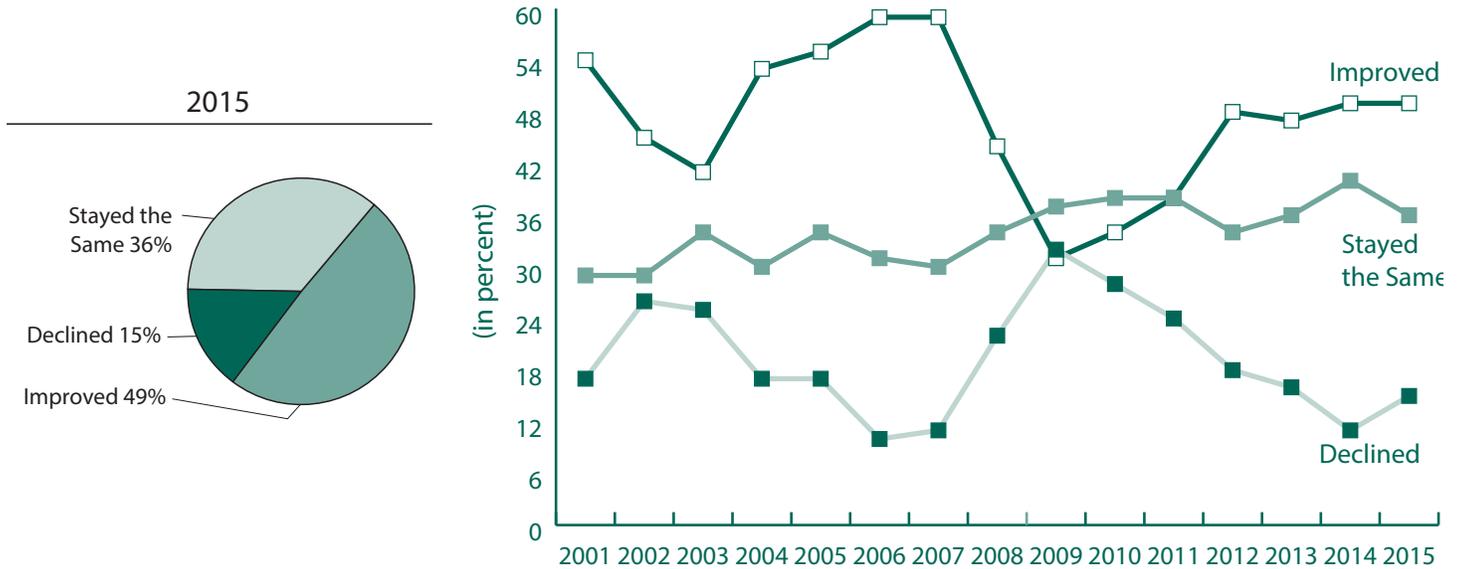
Sector	2015	2014	2013	2012	2011	2010
Agriculture	11	10	9	10	8	9
Mining	1	1	-	-	-	-
Utilities	10	9	8	7	8	8
Construction	116	112	96	78	72	77
Manufacturing	94	84	76	65	60	63
Wholesale Trade	171	177	164	139	140	147
Retail Trade	383	376	367	324	310	310
Trans. & Warehousing	46	47	46	50	30	27
Information	226	204	192	150	139	136
Finance & Insurance	336	340	326	335	288	293
Real Estate, Renting & Leasing	235	250	227	219	190	188
Prof. Scientific & Tech.Services	1,498	1,448	1,401	1,187	1,137	1,121
Mgmt. of Companies	79	74	64	57	54	50
Administrative & Support	194	170	160	140	125	123
Educational Services	90	87	82	75	65	69
Health Care & Social Assist.	265	266	263	254	218	222
Arts, Entertainment & Rec.	84	87	76	55	56	54
Accommodation & Food Serv.	461	464	446	420	371	372
Other Services	395	383	346	285	272	285
Public Administration	53	51	45	64	42	40
Non-Classifiable	22	12	10	14	14	21
<b>Total</b>	<b>4,770</b>	<b>4,652</b>	<b>4,404</b>	<b>3,915</b>	<b>3,599</b>	<b>3,615</b>

\* 2014 figures were revised as a result of changes to state supplied data.

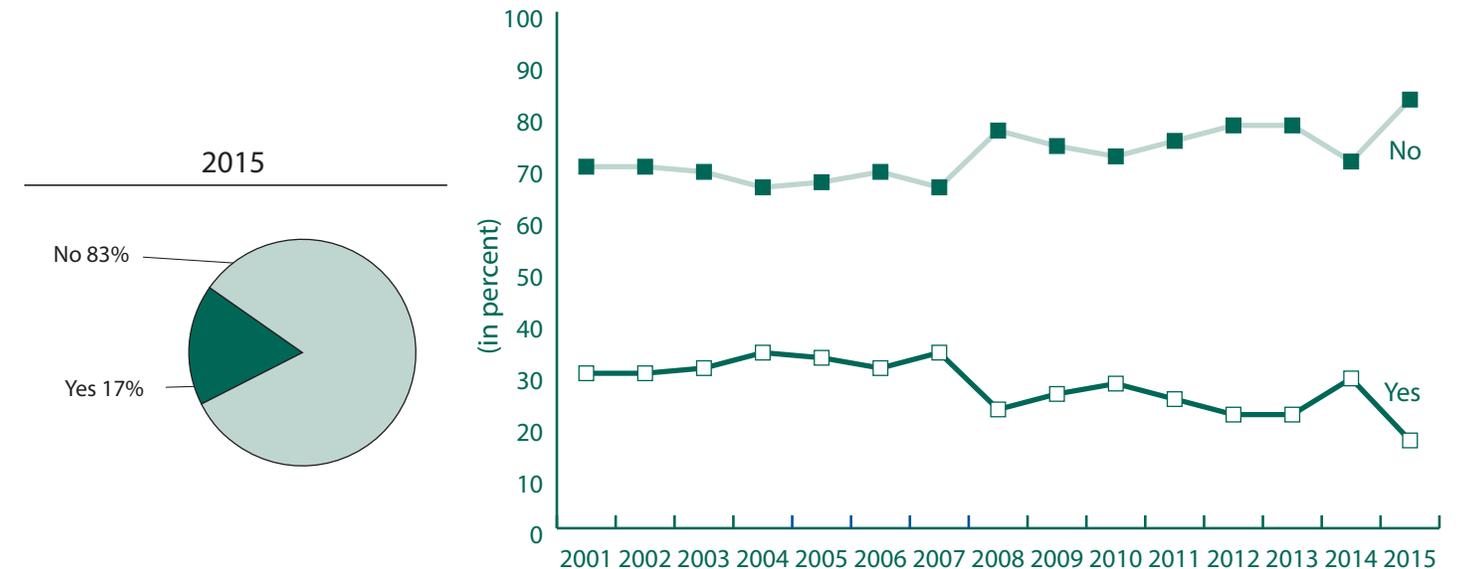
## Survey Results

The 2015 Downtown Business Survey reflects the opinions of business owners and managers operating within the downtown area as of October 1, 2015.

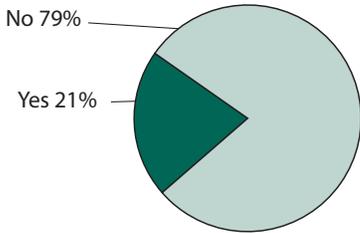
### Change in Health of Business Over the Prior Two Years



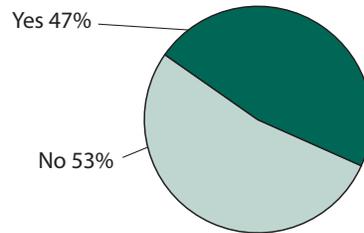
### Plans for Expansion Over Next Two Years



Plans for Business Relocation in the New Two Years

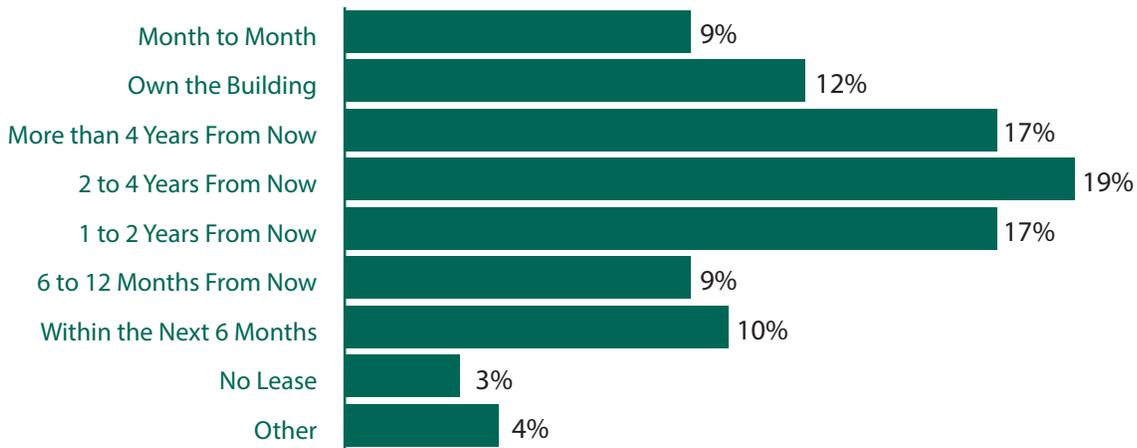


Those That Plan to Relocate Within Downtown Portland



Current Lease Terms/Expiration Date

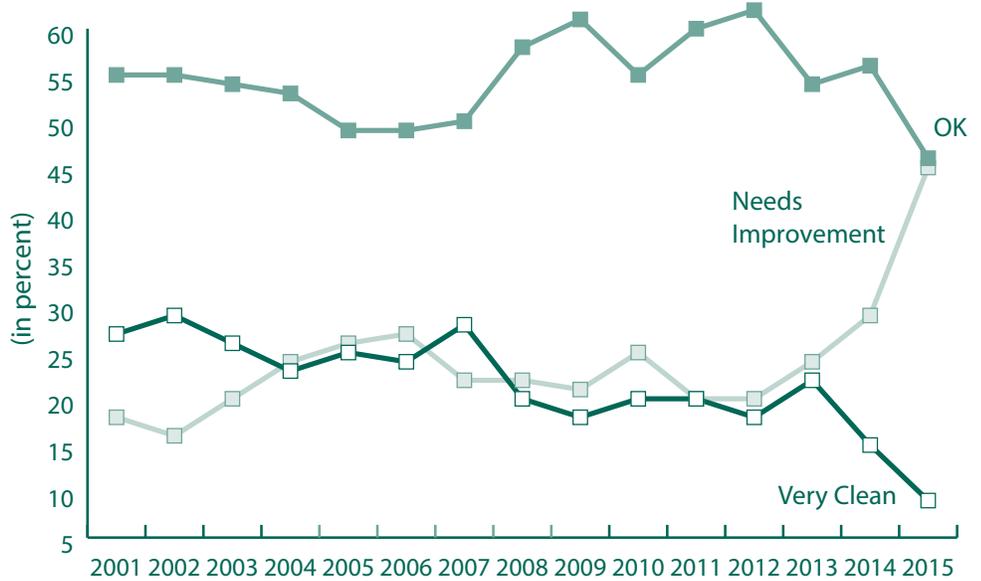
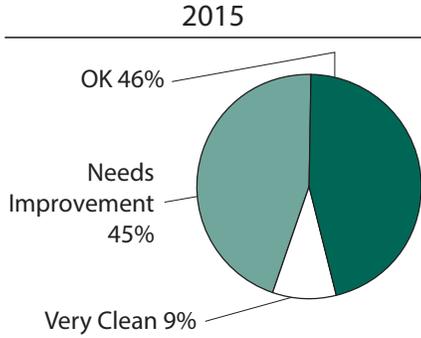
2015



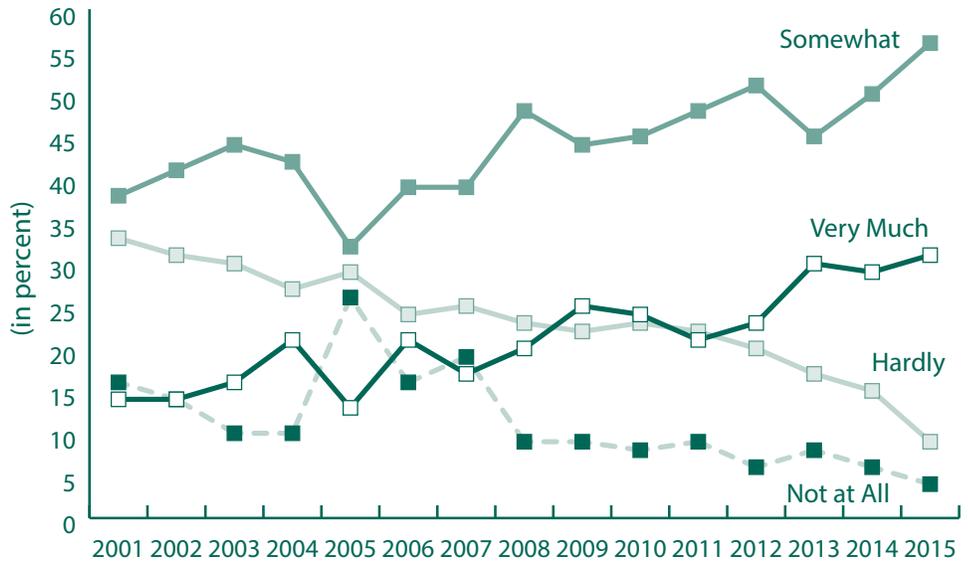
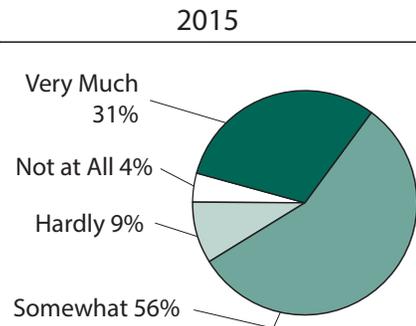
# 2015 Downtown Business Census & Survey

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.

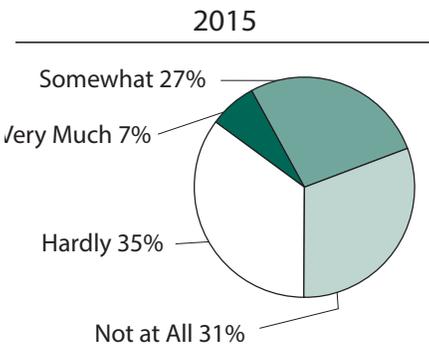
## Downtown Cleanliness



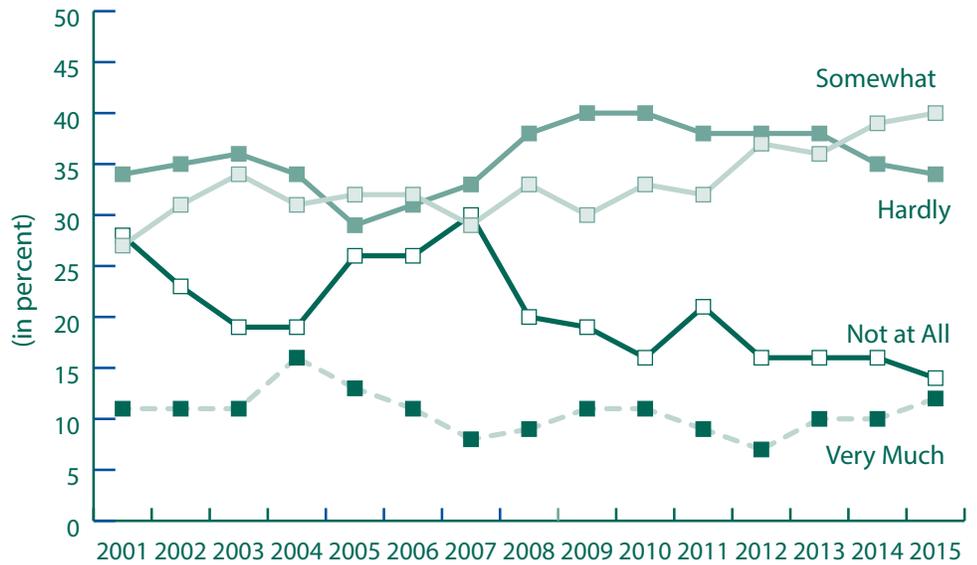
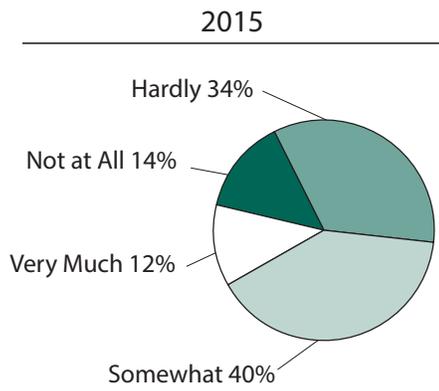
## Impact of Panhandlers and Public Inebriates



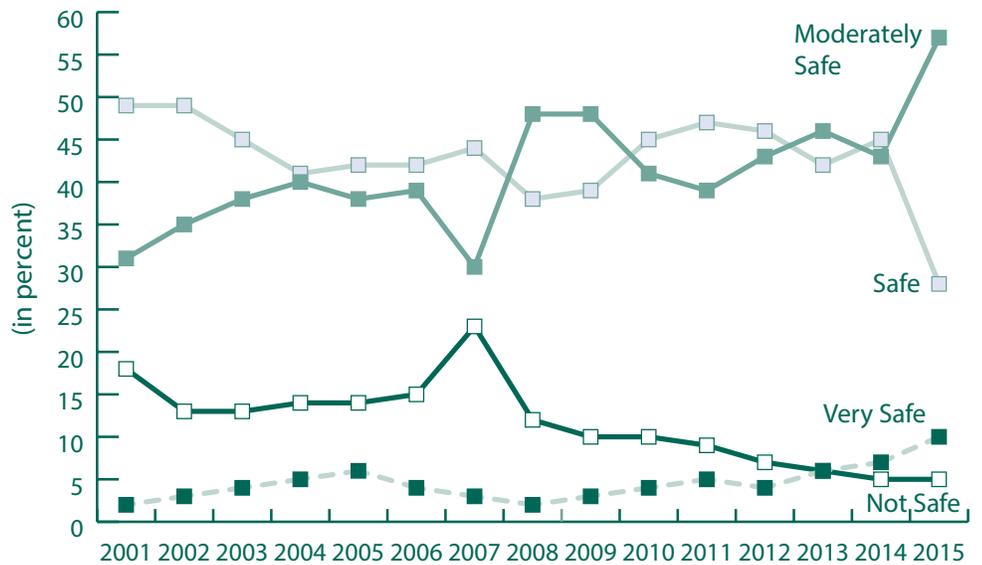
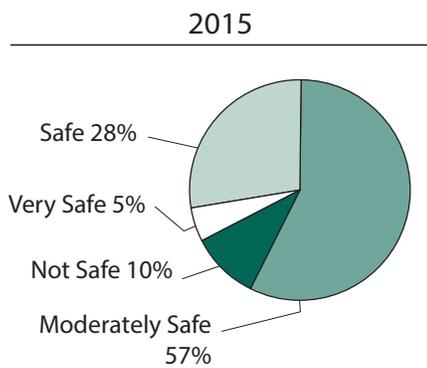
## Adequate services for homeless and mentally ill\*



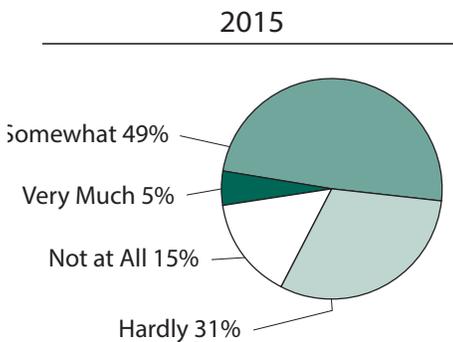
### Effects of Graffiti and Vandalism



### Downtown Safety



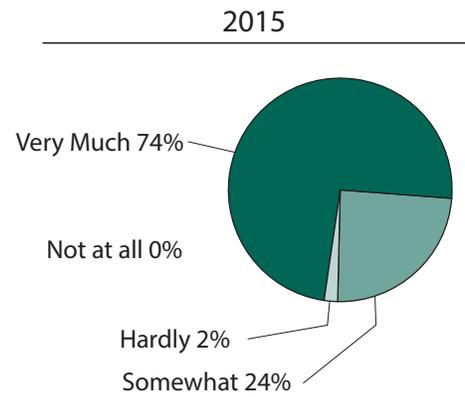
### Expectation of civility in public spaces\*



\* New questions added in 2015.

## 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

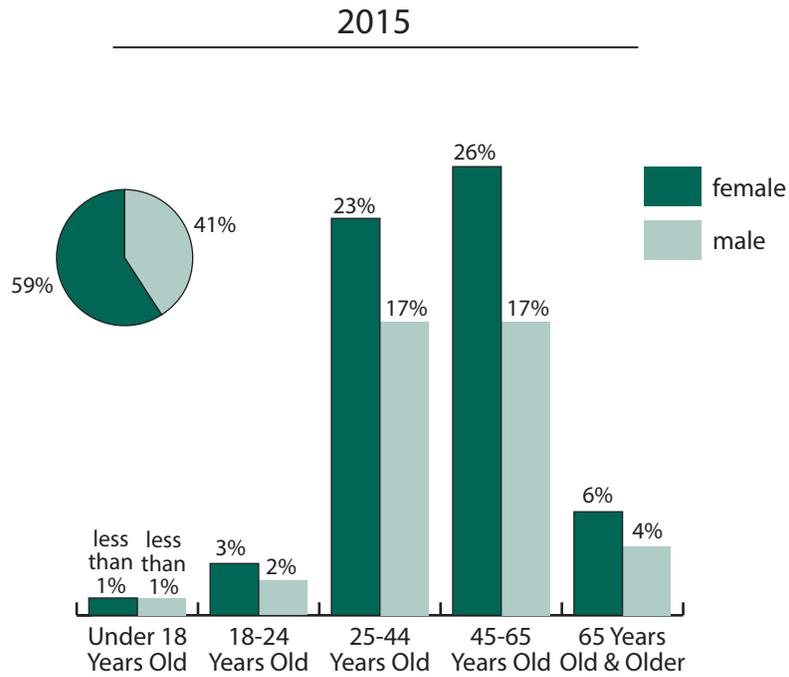
	2015 Rank	2014 Rank	2013 Rank	2012 Rank	2011 Rank	2010 Rank	2009 Rank	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank	2001 Rank
Central Location	1	1	1	1	1	1	1	1	1	3	1	3	4	3	4
Public Transportation	2	2	3	2	2	3	3	2	2	1	3	2	2	1	2
Proximity to Other Businesses	3	3	2	4	3	2	2	3	--	--	--	--	--	--	--
Accessibility	4	4	4	5	4	4	4	4	3	--	--	--	--	--	--
Perception	5	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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

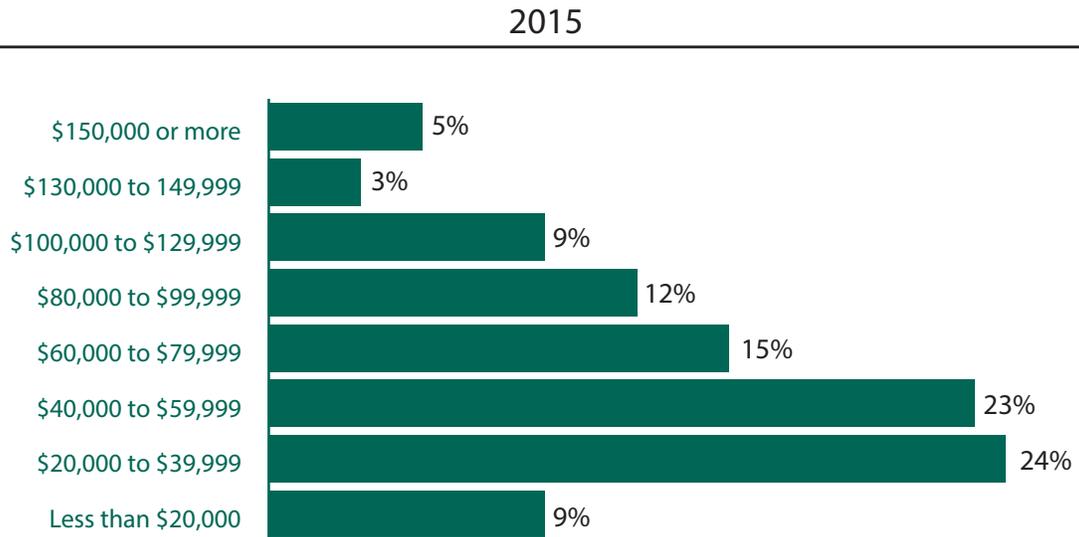
## Factors that Need Improvement

	2015 Rank	2014 Rank	2013 Rank	2012 Rank	2011 Rank	2010 Rank	2009 Rank	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank	2001 Rank
Transients	1	2	2	2	2	2	2	2	3	2	2	2	2	2	4
Panhandlers	2	1	1	1	1	1	1	1	2	1	1	1	1	1	1
Availability of Parking	3	4	5	4	5	5	4	4	4	--	--	--	--	--	--
Cost of Parking	4	3	3	3	3	3	3	3	5	4	3	3	4	4	5
Safety	5	--	--	--	--	--	--	--	--	--	--	--	--	--	--

## Employee Age and Gender Distribution



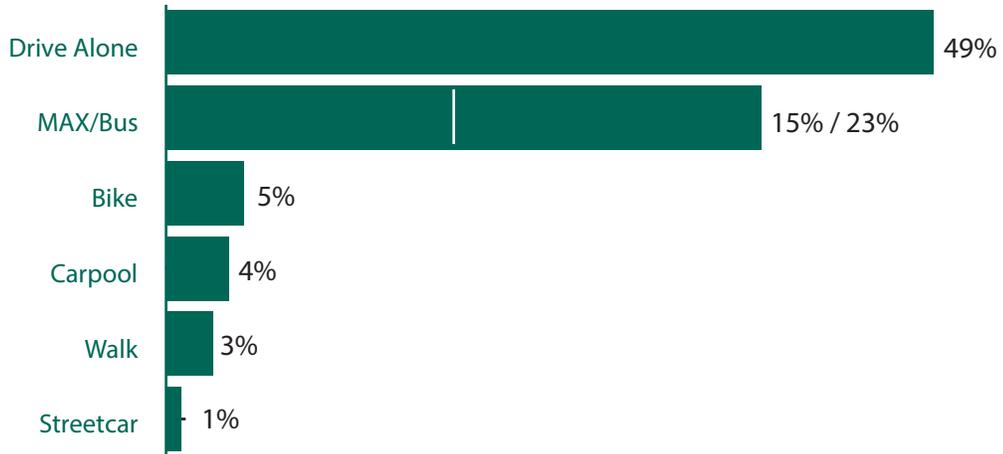
## Annual Salaries of Downtown Workforce



## How Downtown Employees Get to Work

2015

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## Downtown Employee Residences

2015

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