

2017 DOWNTOWN PORTLAND Business Census & Survey



- EST. 1988 -

LETTER FROM THE CHAIR

This year's Business Census & Survey shows notable changes from recent reports. From downtown Portland hitting an important milestone in employment, to the need for more expectations around civility and improved cleanliness, it is evident our city is experiencing significant growth and with that growing pains.

Downtown Portland's Clean & Safe District celebrates 30 years of providing cleaning, security and information services in the heart of the Rose City. It is inspiring to see how far we have come since 1988. Today, Clean & Safe operates a 213-block enhanced service district, made possible from funds provided by business owners in the district, and unique partnerships with the public and nonprofit sectors.

We are an organization that strives to ensure downtown Portland is a place everyone can be proud of, and our board of directors is committed to doing its part. In fact, in an effort to address issues around access to basic amenities such as trash bins, our board made an additional \$300,000 commitment this year. The added investment will bring in 200 new high-capacity garbage cans into the downtown core during the coming months. This is just one of the many ways that Clean & Safe is making a difference in downtown.

We hope to continue to serve as an example of the progress that's possible when we all work together.

ERIC MURFITT

Chair, Clean & Safe Board of Directors
Controller, Mercantile

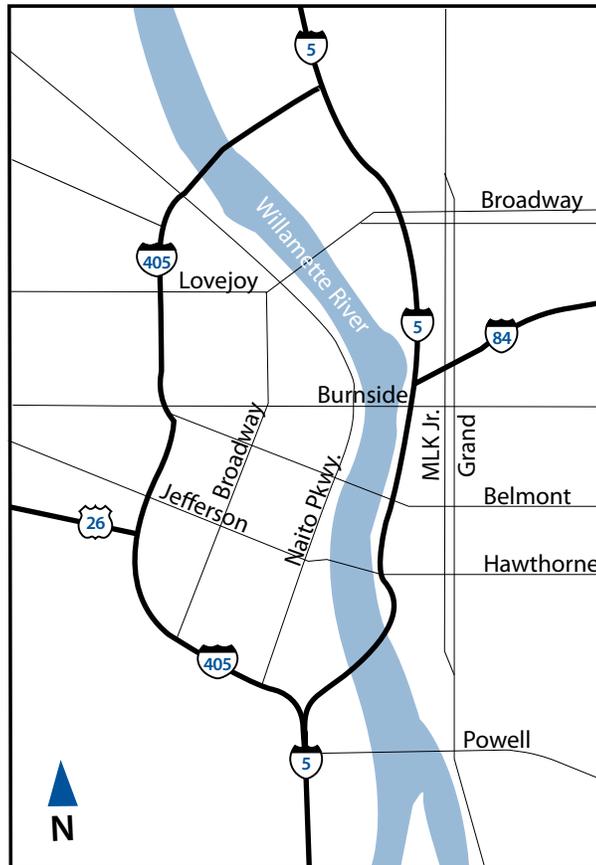


ABOUT THE CENSUS

The Downtown Business Census reflects the opinions of business owners and managers operating within the I-405/I-5 loop as of Oct. 1, 2017.

The Downtown Business Census is a comprehensive data-gathering project involving all downtown Portland businesses, government entities and nonprofit organizations. The purpose of this project is: 1) to accurately identify and count all 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.

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



DOWNTOWN EMPLOYMENT

The 2017 Downtown Business Census reveals there was a **3.36 percent increase** in employment and marks the first time the Central City has surpassed the 100,000 mark. This includes:

- **102,361** employees
- **5,024** businesses, organizations and governmental entities

Figure 1: Employment by industry sector

SECTOR	2017	2016	2015	2014	2013	2012	2011	2010
Agriculture	392	231	225	196	191	190	199	198
Utilities, Mining, Construction	3,243	3,497	3,389	3,784	3,827	3,436	3,130	2,945
Manufacturing	1,058	1,183	1,102	924	825	843	924	839
Wholesale Trade	1,129	1,088	1,054	1,015	1,111	1,080	1,061	1,141
Retail Trade	4,760	4,810	4,979	5,179	4,965	4,653	4,398	4,325
Trans. & Warehousing	1,382	1,341	1,492	1,453	1,404	1,483	1,506	1,887
Information	5,979	5,736	5,667	5,367	5,069	4,496	4,079	4,240
Finance & Insurance	12,153	11,174	11,001	10,833	10,486	10,578	10,443	10,667
Real Estate & Leasing	3,355	2,634	2,798	2,762	2,579	2,601	2,582	2,608
Professional/Tech. Services	21,423	21,057	20,444	19,493	18,573	17,888	17,038	15,710
Mgmt. of Companies	5,248	5,241	4,996	4,532	4,075	3,803	3,882	3,887
Admin. & Support Services	5,880	5,430	5,618	5,259	5,430	4,668	4,589	5,028
Educational Services	7,812	7,876	7,488	7,403	6,875	6,862	6,603	6,809
Health Care & Social Assist.	4,481	4,382	4,138	3,867	3,736	3,576	3,578	3,241
Arts, Entertainment & Rec.	2,023	1,915	1,780	1,872	1,685	1,467	1,949	1,886
Accommodation & Food Serv.	11,637	11,113	10,659	10,492	10,222	10,645	10,261	10,374
Other Services	5,358	3,540	3,409	3,433	3,238	3,354	3,312	3,380
Public Administration	6,981	6,753	7,023	7,073	7,177	7,909	8,035	7,846
Non-Classifiable	17	30	19	0	1	20	19	27
TOTAL	102,361	99,031	97,281	94,937	91,469	89,552	87,588	87,038

DOWNTOWN EMPLOYMENT

Figure 2: Enterprises by industry sector

SECTOR	2017	2016	2015	2014	2013	2012	2011	2010
Agriculture	15	15	11	10	9	10	8	9
Utilities, Mining, Construction	112	133	127	122	104	85	80	85
Manufacturing	118	108	94	84	76	65	60	63
Wholesale Trade	165	167	171	177	164	139	140	147
Retail Trade	386	385	383	376	367	324	310	310
Trans. & Warehousing	53	47	46	47	46	50	30	27
Information	254	237	226	204	192	150	139	136
Finance & Insurance	342	342	336	340	326	335	288	293
Real Estate & Leasing	256	240	235	250	227	219	190	188
Professional/Tech. Services	1,576	1,535	1,498	1,448	1,401	1,187	1,137	1,121
Mgmt. of Companies	85	88	79	74	64	57	54	50
Admin. & Support Services	207	195	194	170	160	140	125	123
Educational Services	89	92	90	87	82	75	65	69
Health Care & Social Assist.	261	262	265	266	263	254	218	222
Arts, Entertainment & Rec.	92	92	84	87	76	55	56	54
Accommodation & Food Serv.	498	480	461	464	446	420	371	372
Other Services	425	440	395	383	346	285	272	285
Public Administration	47	46	53	51	45	64	42	40
Non-Classifiable	43	54	22	12	10	14	14	21
TOTAL	5,024	4,958	4,770	4,652	4,404	3,915	3,599	3,615



DOWNTOWN BUSINESS HEALTH & LEASING

Figure 3: Health of business over the prior two years

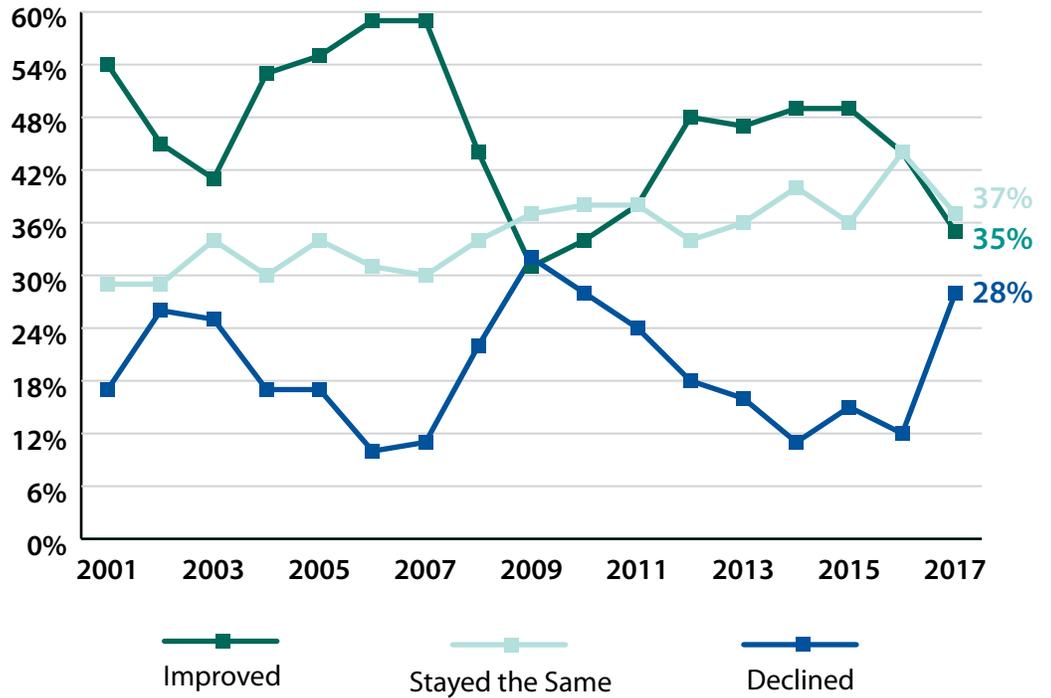
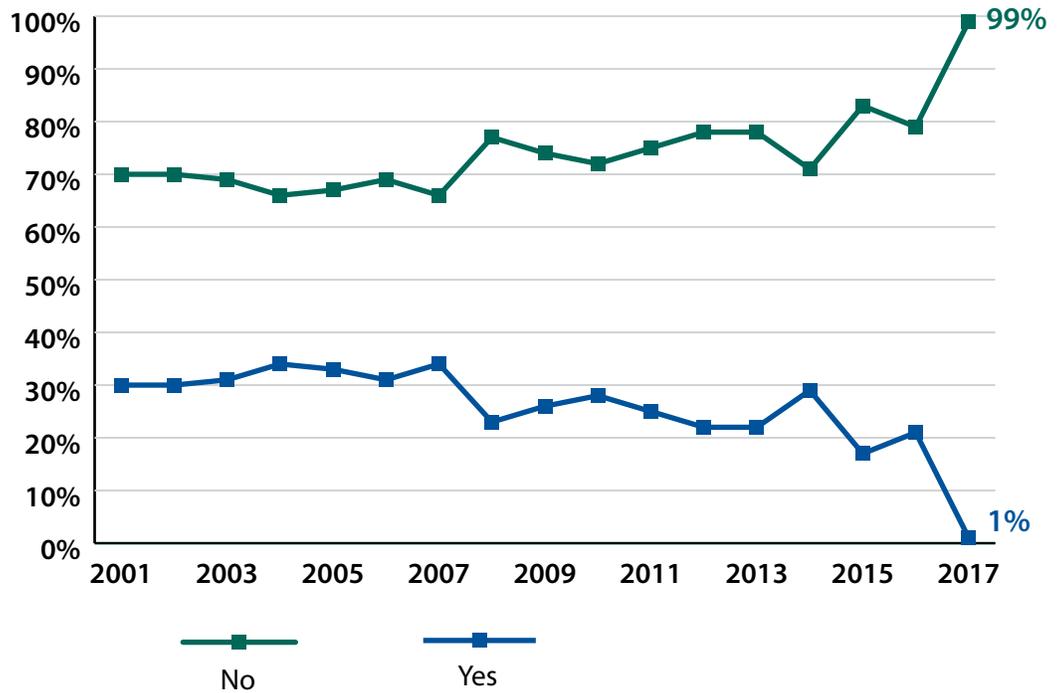


Figure 4: Expansion plans over next two years



DOWNTOWN BUSINESS HEALTH & LEASING

Figure 5: Plan for business relocation in the next two years

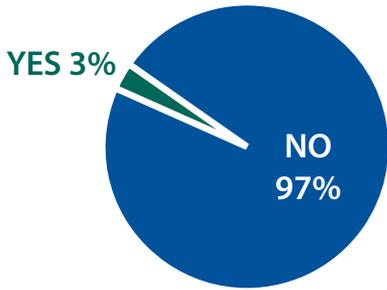


Figure 6: Plan to relocate within downtown Portland

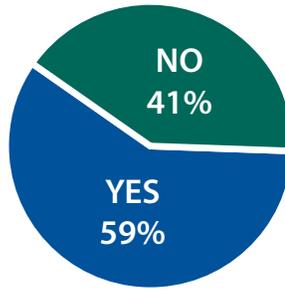
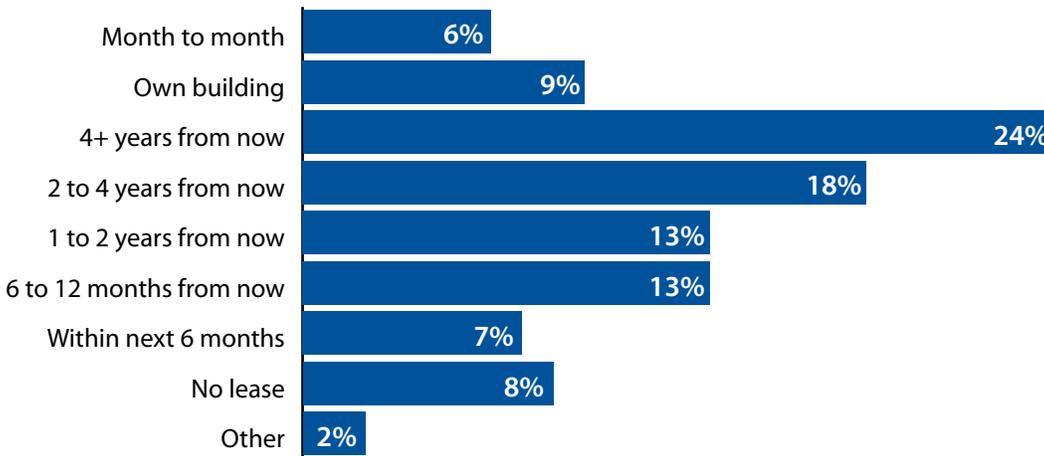


Figure 7: Current lease terms or expiration date



DOWNTOWN LIVABILITY

Figure 8: Adequate services for homeless/mentally ill

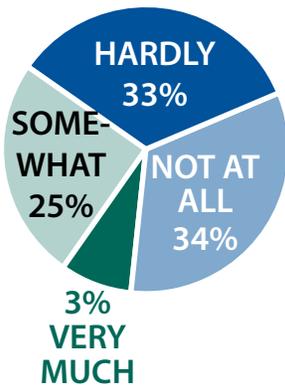
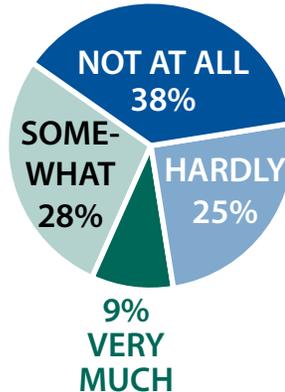


Figure 9: Expectation of civility in public spaces



DOWNTOWN LIVABILITY

Figure 10: Downtown cleanliness

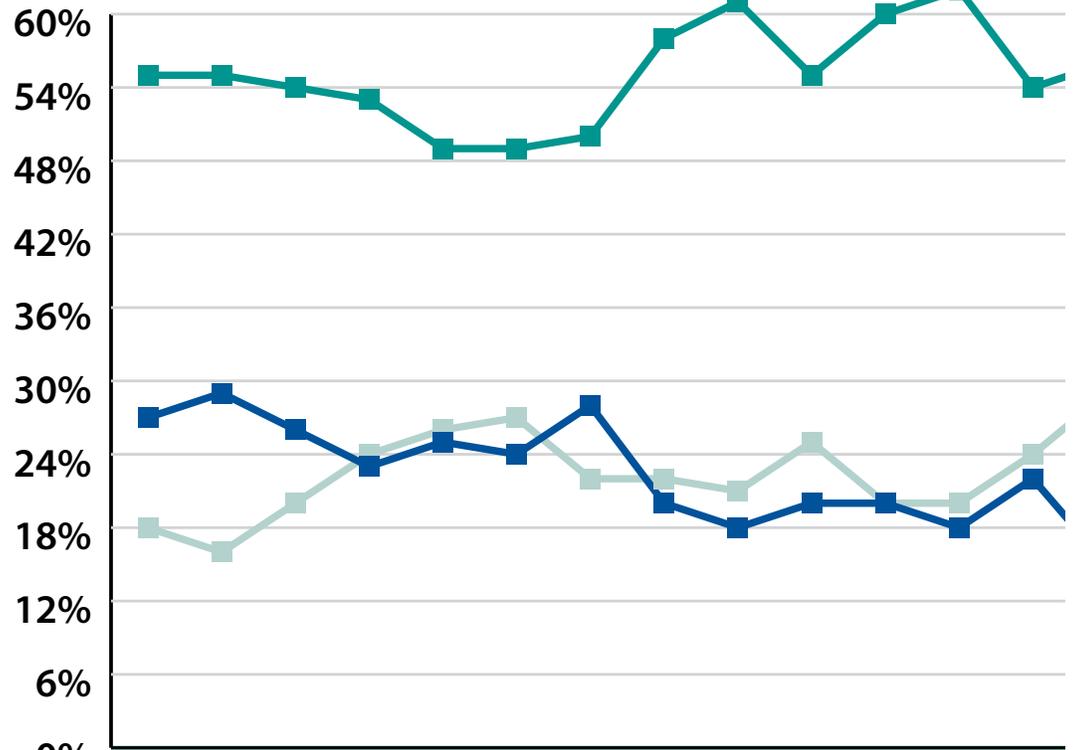


Figure 11: Impact of panhandlers and public inebriates

2001 2003 2005 2007 2009 2011 2013

Very Clean OK Needs Improvement



DOWNTOWN LIVABILITY

Figure 12: Effects of graffiti and vandalism

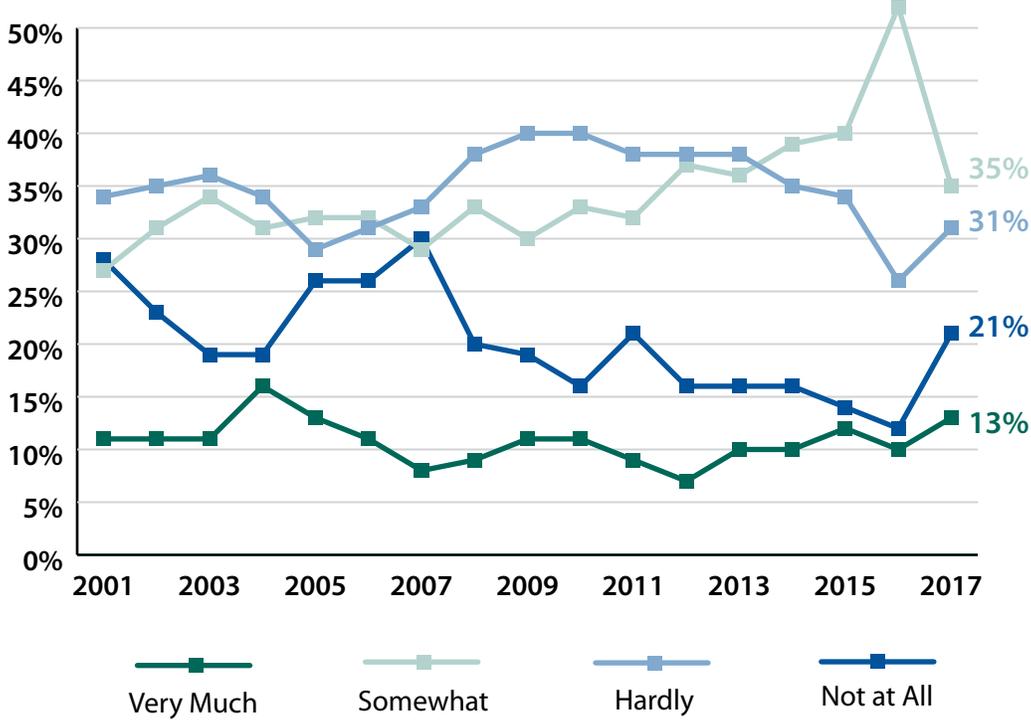
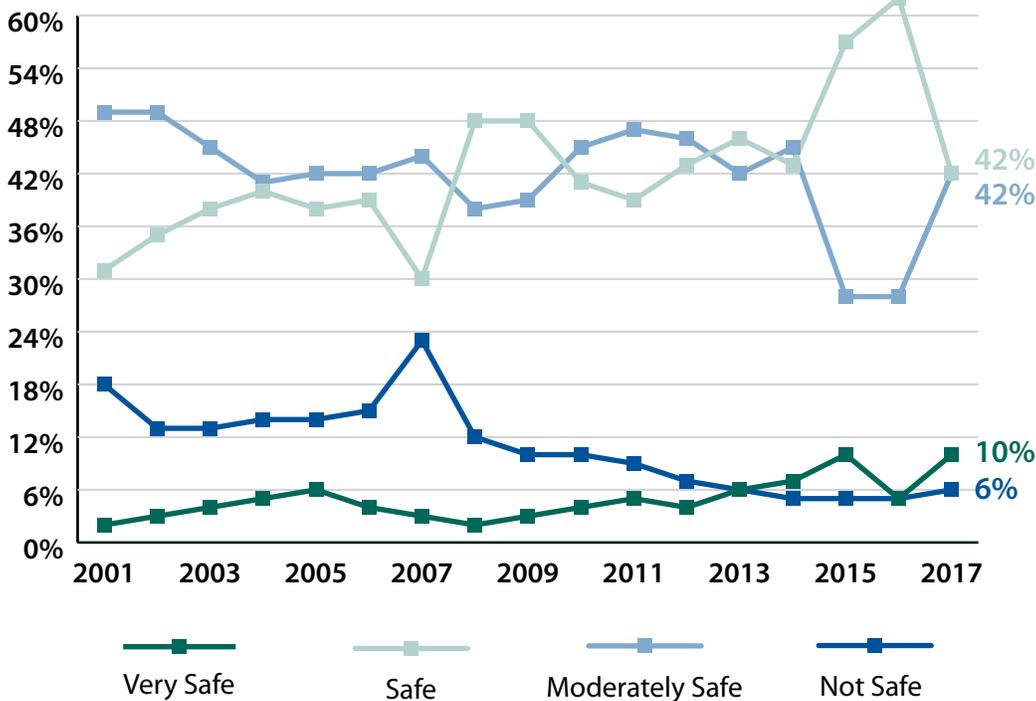


Figure 13: Downtown safety



DOWNTOWN LIVABILITY

Figure 14: Value of Holiday Lighting Program to business

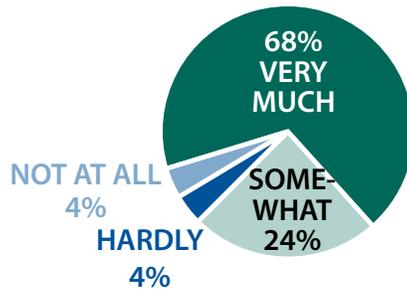


Figure 15: Most important factors for business locating or staying downtown

FACTOR	2017	2016	2015	2014	2013	2012	2011	2010
Central location	1	1	1	1	1	1	1	1
Public transportation	2	3	2	2	3	2	2	3
Proximity to other businesses	3	2	3	3	2	4	3	2
Accessibility	4	4	4	4	4	5	4	4
Density of people & Atmosphere (tie)	5	--	--	--	--	--	--	--

Figure 16: Factors that need improvement

FACTOR	2017	2016	2015	2014	2013	2012	2011	2010
Transients	1	1	1	2	2	2	2	2
Panhandlers	2	2	2	1	1	1	1	1
Cost of parking	3	4	4	3	3	3	3	3
Availability of parking	4	3	3	4	5	4	5	5
Construction	5	--	--	--	--	--	--	--



DOWNTOWN DEMOGRAPHICS

Figure 17: Employee age and gender distribution

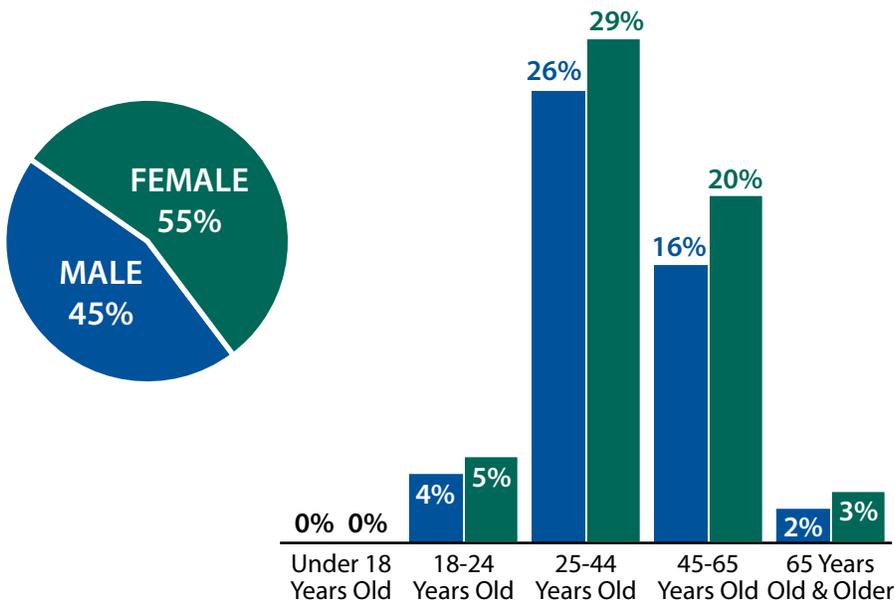
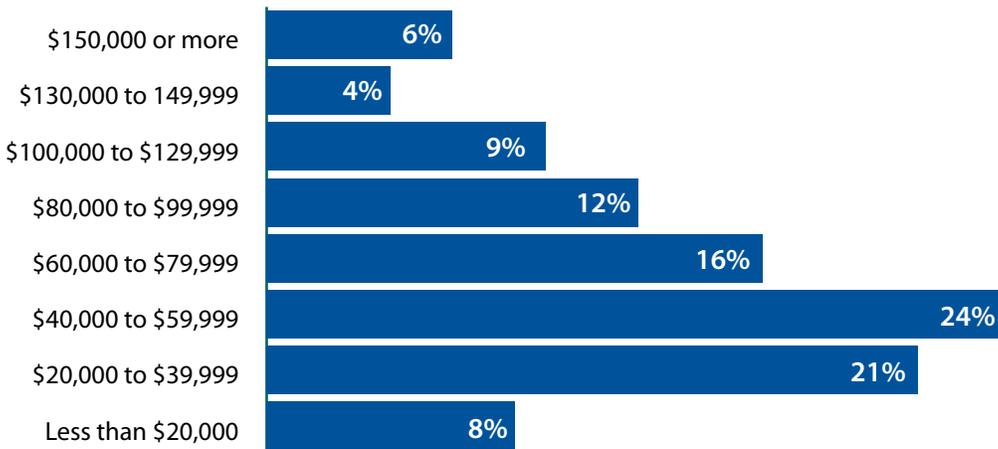


Figure 18: Annual salaries of downtown workforce



DOWNTOWN TRANSPORTATION

Figure 19: How downtown employees get to work

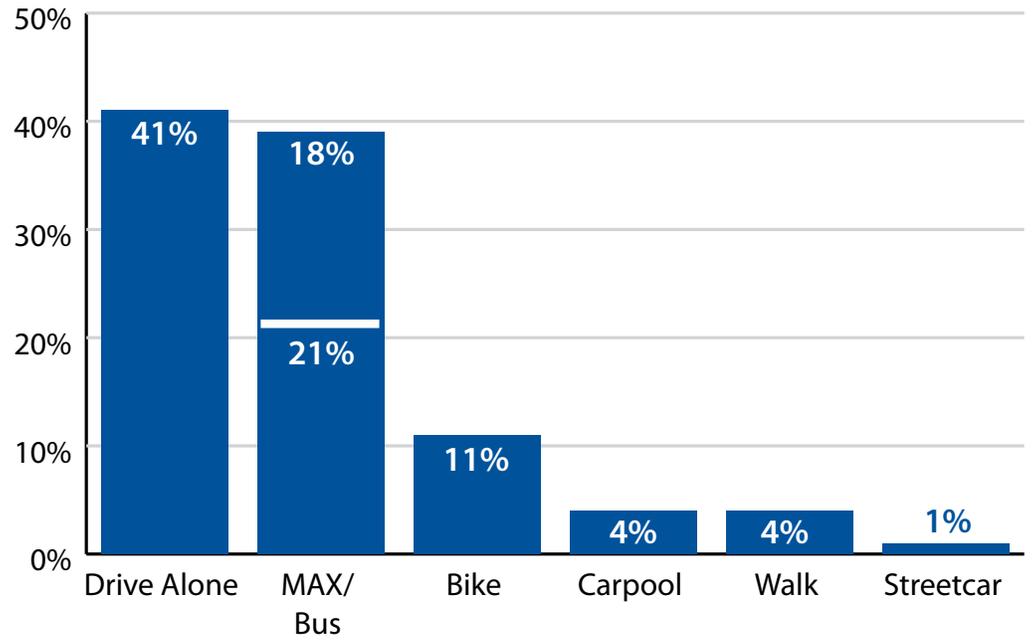
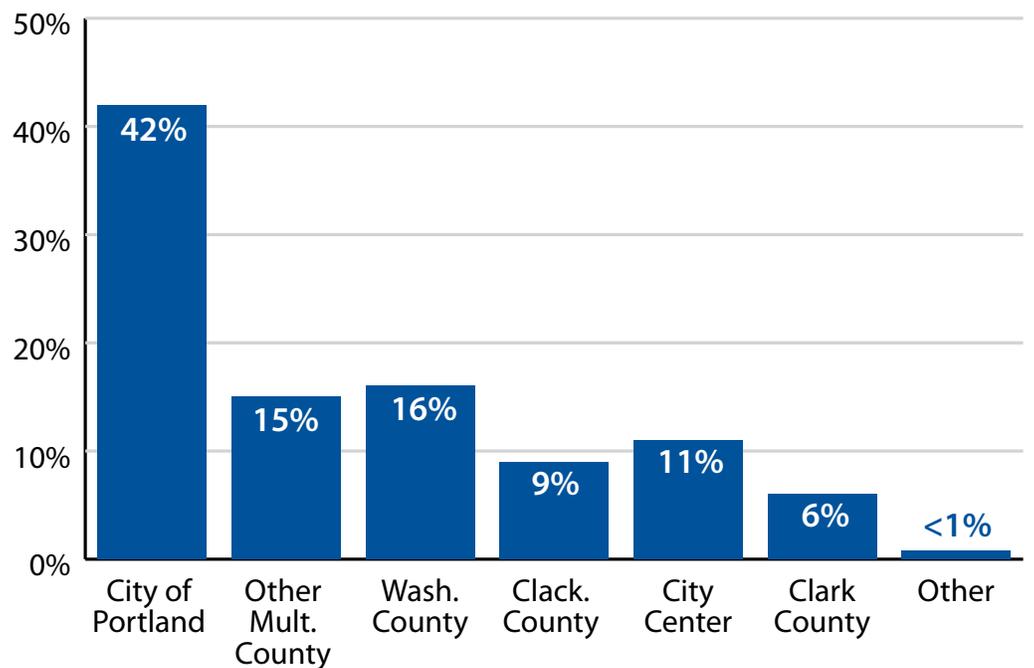


Figure 20: Downtown employee residences



CENSUS DATABASE & SITE ANALYSIS

The information for the census is collected by business location and used 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 Prosper Portland; this is a shift in data collection methodology from 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 via phone interview. A statistically significant response (+/-4%) was collected for all other survey questions. The census is conducted on an annual basis using Oct. 1 of each year as the baseline date for responses and collected information.

NAICS Categories

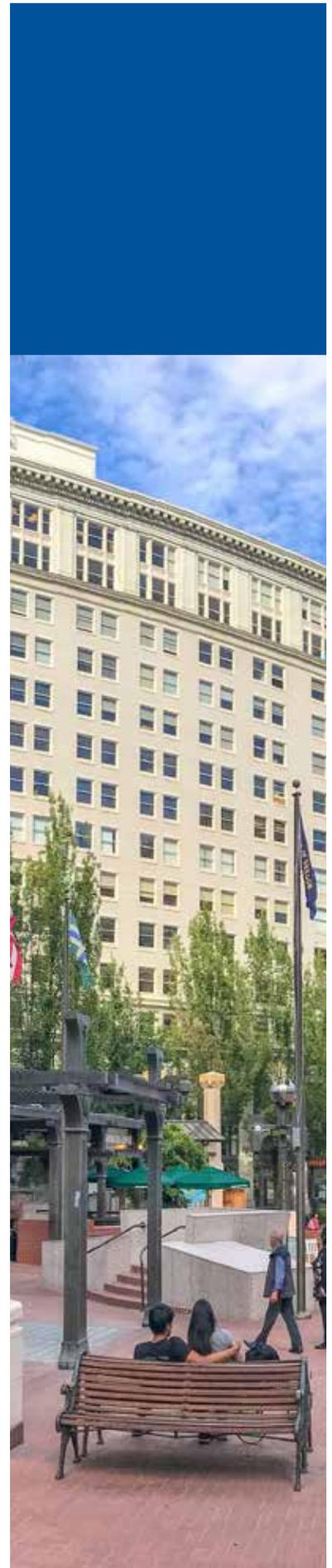
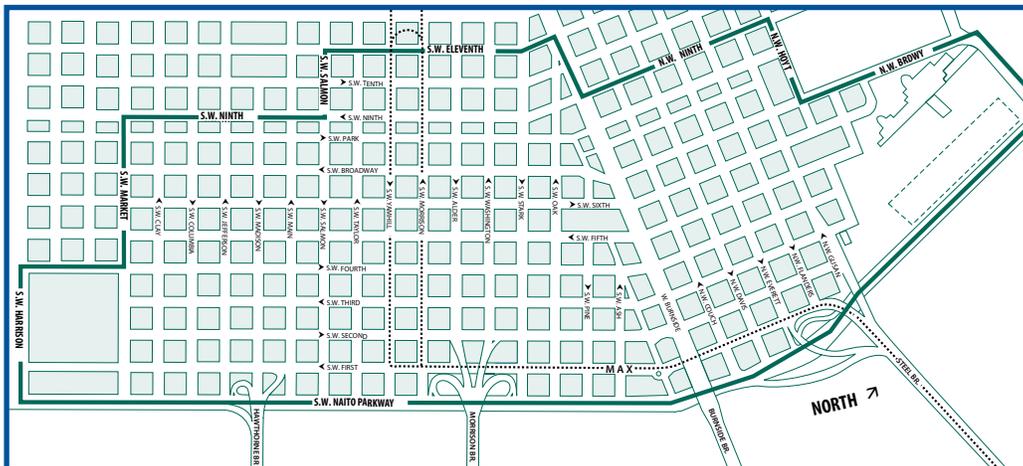
The 2002 North American Industry Classification System (NAICS) is used to categorize all of the enterprises. Though information was collected for each geographic location, each enterprise is represented only once in the calculated results. Every enterprise is classified by at least the industry sector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

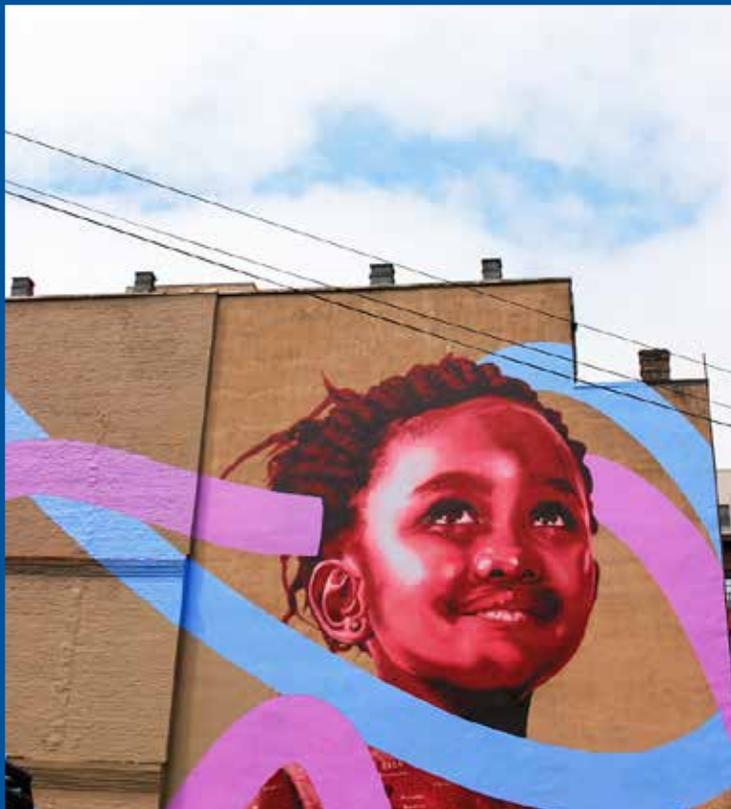
NAICS Code Sector

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

Cleanliness & Safety

When responding to survey questions regarding cleanliness, impact of panhandlers and public inebriates, the effects of vandalism and downtown safety (Figures 8-14), respondents were asked to consider the boundary of the Clean & Safe District, see map below.





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