

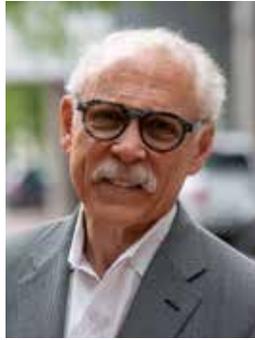
2018

DOWNTOWN PORTLAND Business Census & Survey



Clean & Safe

LETTER FROM THE CHAIR



Every year, we invite businesses in the downtown core to share thoughts on how our community is doing. From feedback on cleanliness and livability to business growth and development, the perspectives shared by businesses helps us focus our efforts to keep Downtown Portland a thriving place for everyone.

We thank those who took the time to share their thoughts. This Downtown Portland Business & Census Survey report is an overview of what we learned over the last year.

A key takeaway is that cleanliness in Downtown Portland needs improvement. As the chair of the Downtown Portland Clean & Safe board of directors, I want you to know we hear you and we agree that there is more work to be done when it comes to cleanliness in our city's core.

I'm pleased to share that in the past year that is where we have focused much of our effort. Since October 2018, our organization invested in 200 new high-capacity garbage cans throughout the downtown Enhanced Service District. And after lengthy negotiations with the City of Portland, we came to an agreement that garbage haulers would increase collections to seven nights a week – a first for Portland! Additionally, we have dedicated more resources to garbage collection during the day, and we hope you are seeing those results.

We also know there is more work to be done when it comes to livability issues in Downtown Portland. It's clear from respondents that these issues are the biggest challenge we face when conducting business in the Central City. Our board of directors is dedicated to working with public officials and law enforcement agencies to reduce criminal activity, and the impacts that these livability issues have on our businesses and customers. We are also committed to ensuring local leaders understand that these impacts can have devastating effects to the people experiencing homelessness, as well as our local economy. These problems will take community-wide solutions, and we are eager to collaborate.

Ultimately, the progress we have made in the past year is a result of strong partnerships between public and private sector leaders. We know there is more work to be done, and we look forward to seeing what will be accomplished as we continue to work together. Our common desire for a downtown that is welcoming and safe for all who choose live, work and visit is what drives us. We hope to continue to serve as an example of what is possible when we work together.

MARK SCHLESINGER

Chair, Clean & Safe Board of Directors
Partner/Senior Project Manager, Schlesinger Companies
October 2019

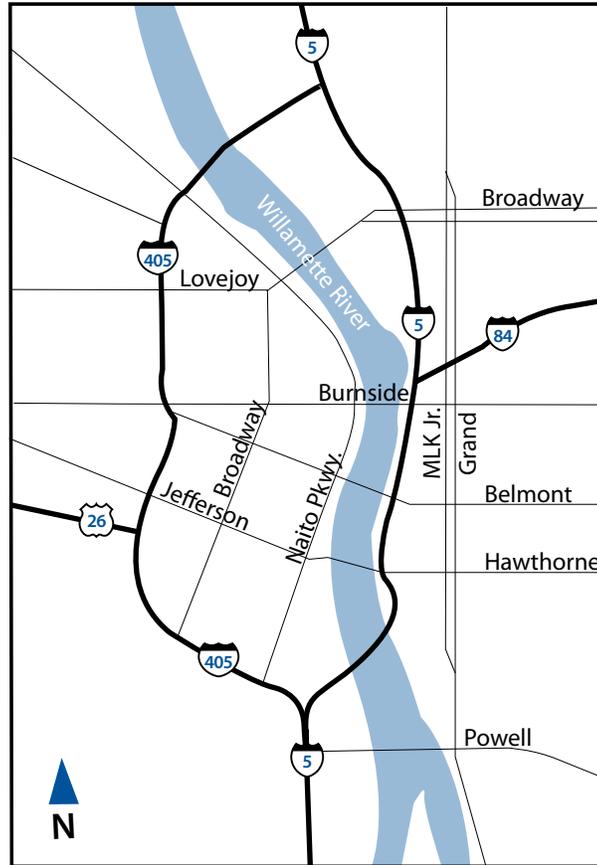


ABOUT THE CENSUS

The Downtown Business Census reflects the opinions of business owners and managers operating within the I-405/I-5 loop as of Oct. 1, 2018.

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 2018 Downtown Business Census reveals there was a modest **.3 percent increase** in employment and marks the second time the Central City has surpassed the 100,000 mark. This includes:

- **102,630** employees
- **5,066** businesses, organizations and governmental entities

Figure 1: Employment by industry sector

SECTOR	2018	2017	2016	2015	2014	2013	2012	2011	2010
Agriculture	364	392	231	225	196	191	190	199	198
Utilities, Mining, Construction	3,602	3,243	3,497	3,389	3,784	3,827	3,436	3,130	2,945
Manufacturing	917	1,058	1,183	1,102	924	825	843	924	839
Wholesale Trade	1,095	1,129	1,088	1,054	1,015	1,111	1,080	1,061	1,141
Retail Trade	4,801	4,760	4,810	4,979	5,179	4,965	4,653	4,398	4,325
Trans. & Warehousing	1,571	1,382	1,341	1,492	1,453	1,404	1,483	1,506	1,887
Information	6,005	5,979	5,736	5,667	5,367	5,069	4,496	4,079	4,240
Finance & Insurance	11,288	12,153	11,174	11,001	10,833	10,486	10,578	10,443	10,667
Real Estate & Leasing	3,598	3,355	2,634	2,798	2,762	2,579	2,601	2,582	2,608
Professional/Tech. Services	21,959	21,423	21,057	20,444	19,493	18,573	17,888	17,038	15,710
Mgmt. of Companies	5,405	5,248	5,241	4,996	4,532	4,075	3,803	3,882	3,887
Admin. & Support Services	6,012	5,880	5,430	5,618	5,259	5,430	4,668	4,589	5,028
Educational Services	7,381	7,812	7,876	7,488	7,403	6,875	6,862	6,603	6,809
Health Care & Social Assist.	4,768	4,481	4,382	4,138	3,867	3,736	3,576	3,578	3,241
Arts, Entertainment & Rec.	1,920	2,023	1,915	1,780	1,872	1,685	1,467	1,949	1,886
Accommodation & Food Service	11,515	11,637	11,113	10,659	10,492	10,222	10,645	10,261	10,374
Other Services	3,349	5,358	3,540	3,409	3,433	3,238	3,354	3,312	3,380
Public Administration	7,053	6,981	6,753	7,023	7,073	7,177	7,909	8,035	7,846
Non-Classifiable	27	17	30	19	0	1	20	19	27
TOTAL	102,630	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	2018	2017	2016	2015	2014	2013	2012	2011	2010
Agriculture	18	15	15	11	10	9	10	8	9
Utilities, Mining, Construction	130	112	133	127	122	104	85	80	85
Manufacturing	114	118	108	94	84	76	65	60	63
Wholesale Trade	159	165	167	171	177	164	139	140	147
Retail Trade	378	386	385	383	376	367	324	310	310
Trans. & Warehousing	52	53	47	46	47	46	50	30	27
Information	260	254	237	226	204	192	150	139	136
Finance & Insurance	341	342	342	336	340	326	335	288	293
Real Estate & Leasing	254	256	240	235	250	227	219	190	188
Professional/Tech. Services	1,591	1,576	1,535	1,498	1,448	1,401	1,187	1,137	1,121
Mgmt. of Companies	82	85	88	79	74	64	57	54	50
Admin. & Support Services	208	207	195	194	170	160	140	125	123
Educational Services	93	89	92	90	87	82	75	65	69
Health Care & Social Assist.	263	261	262	265	266	263	254	218	222
Arts, Entertainment & Rec.	89	92	92	84	87	76	55	56	54
Accommodation & Food Service	502	498	480	461	464	446	420	371	372
Other Services	434	425	440	395	383	346	285	272	285
Public Administration	45	47	46	53	51	45	64	42	40
Non-Classifiable	53	43	54	22	12	10	14	14	21
TOTAL	5,066	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

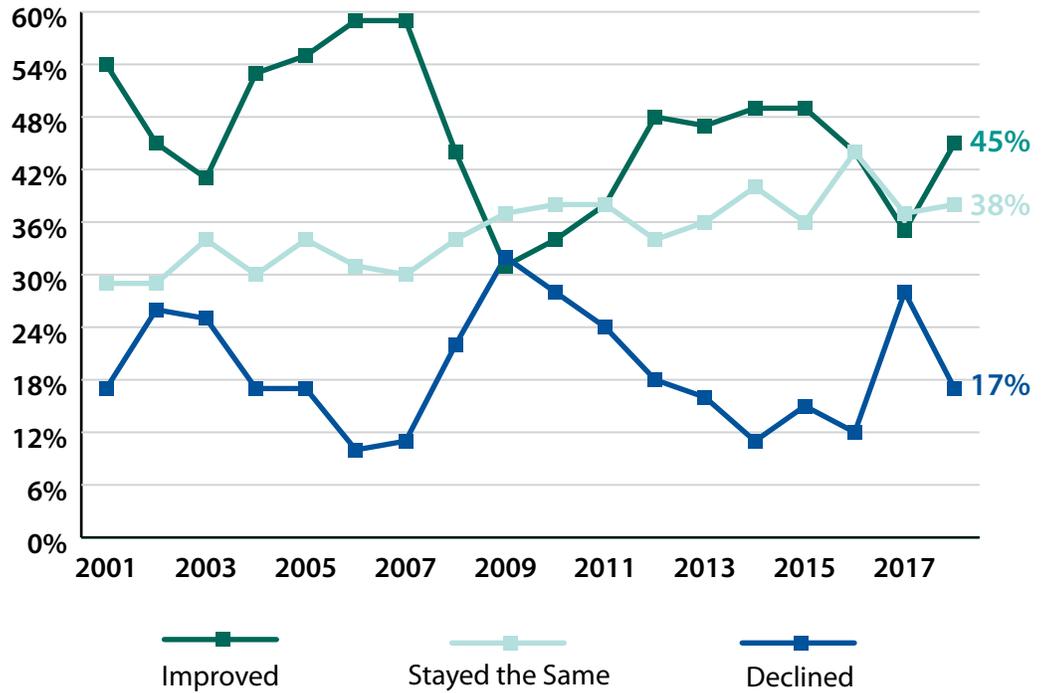
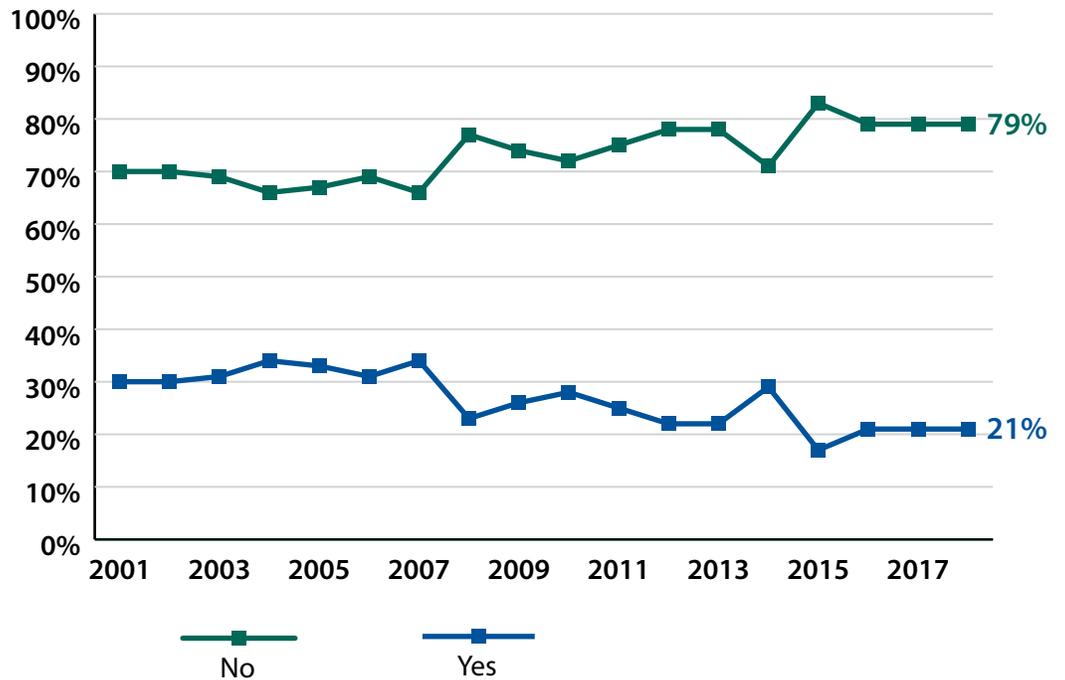


Figure 4: Expansion plans over next two years



DOWNTOWN BUSINESS HEALTH & LEASING

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

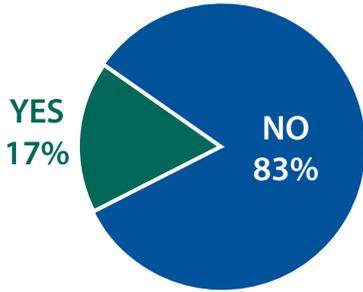


Figure 6: Plan to relocate within downtown Portland

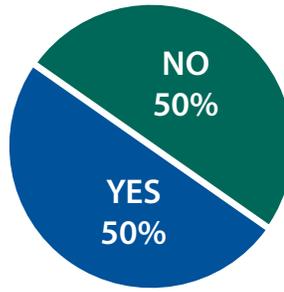
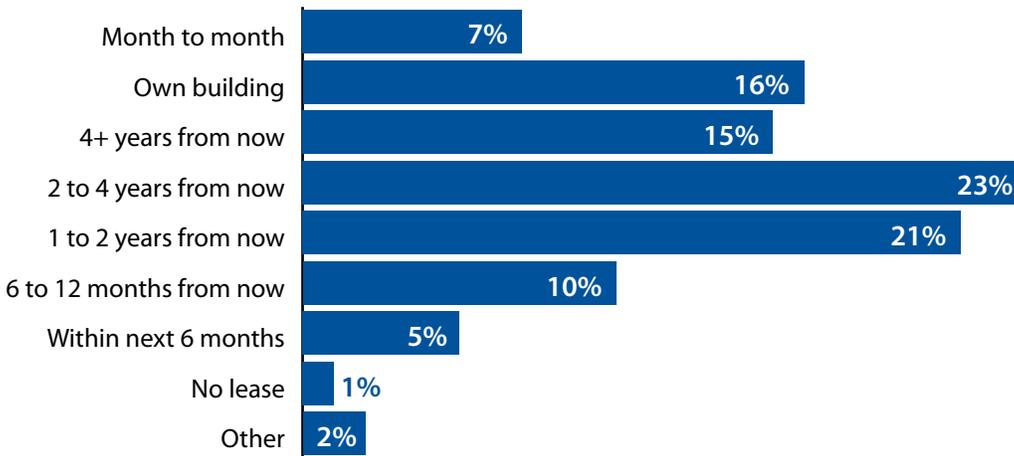


Figure 7: Current lease terms or expiration date



DOWNTOWN LIVABILITY

Figure 8: Adequate services for homeless/mentally ill

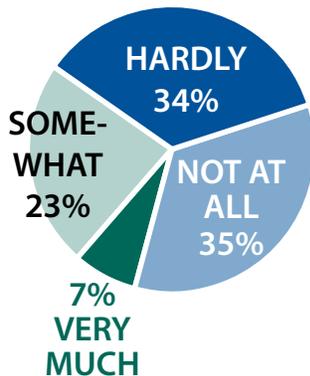
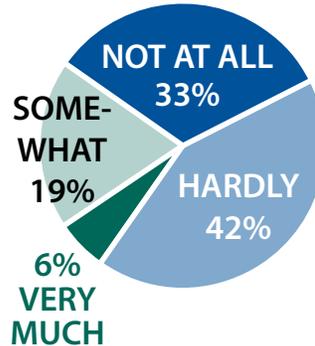


Figure 9: Expectation of civility in public spaces



DOWNTOWN LIVABILITY

Figure 10: Downtown cleanliness

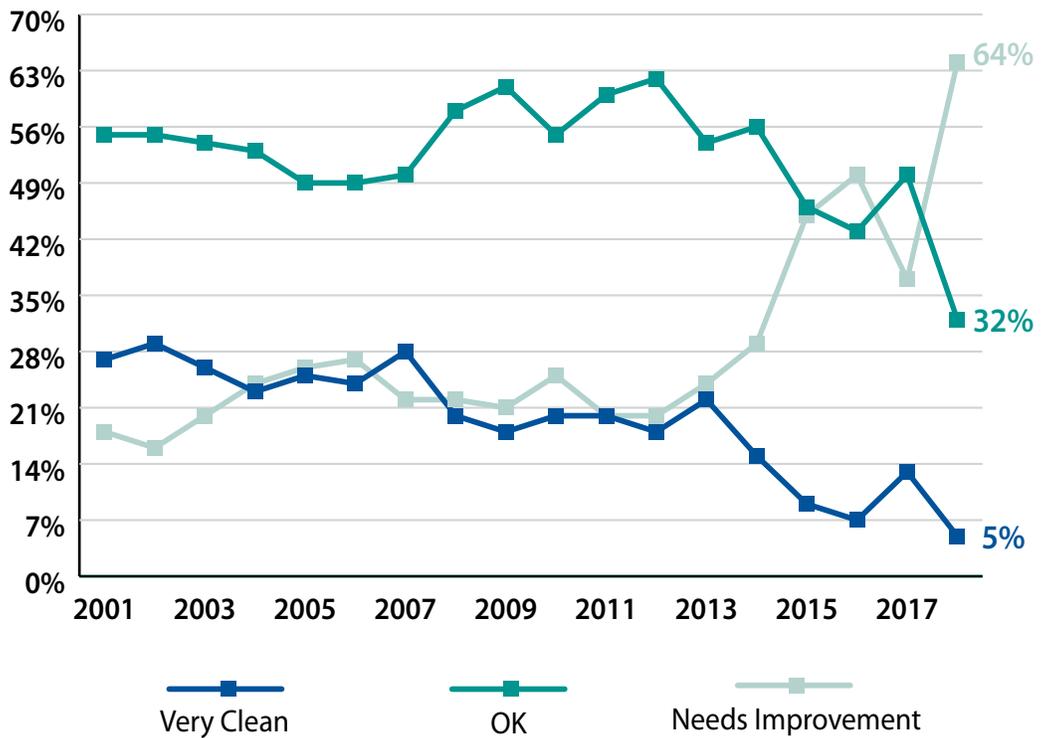
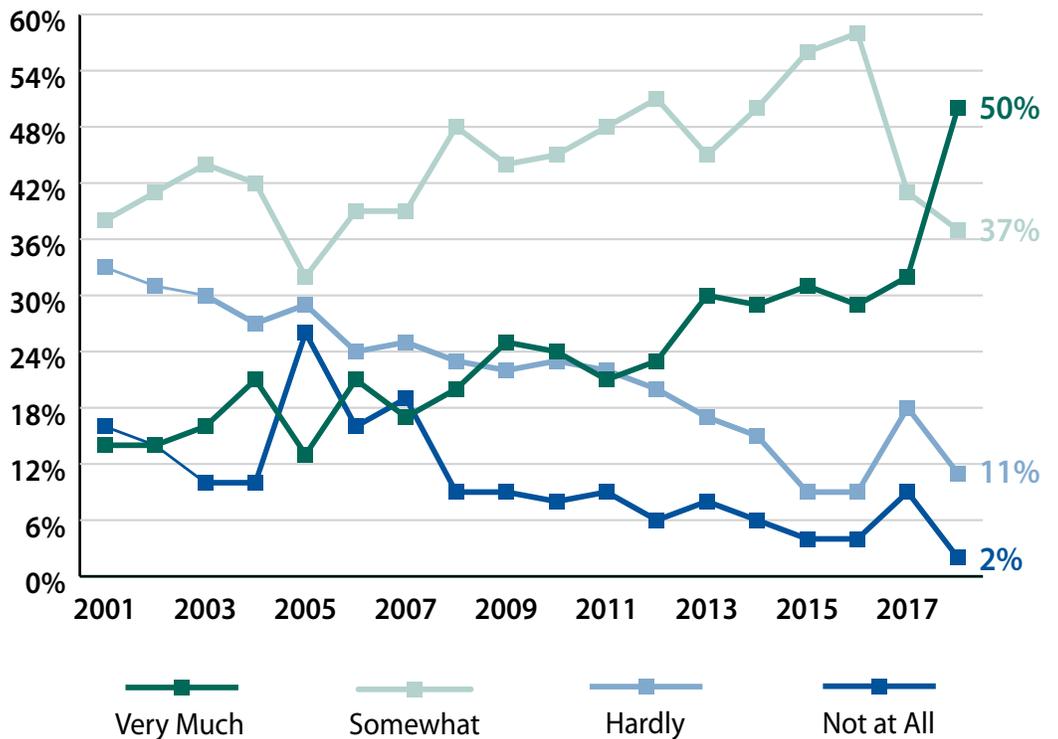


Figure 11: Impact of panhandlers and public inebriates



DOWNTOWN LIVABILITY

Figure 12: Effects of graffiti and vandalism

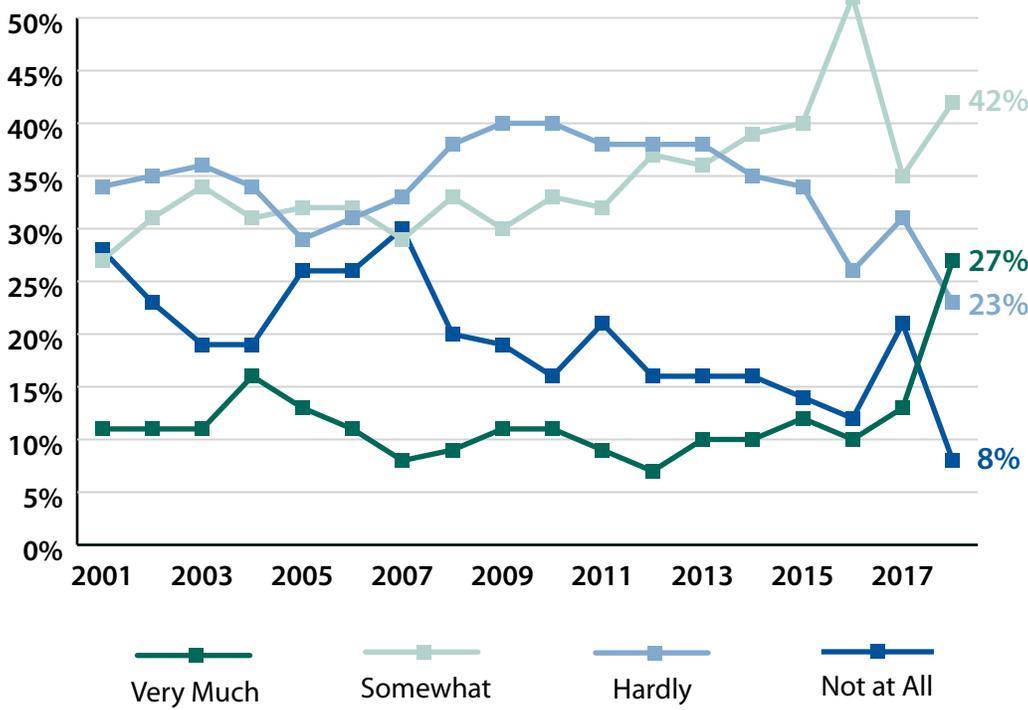
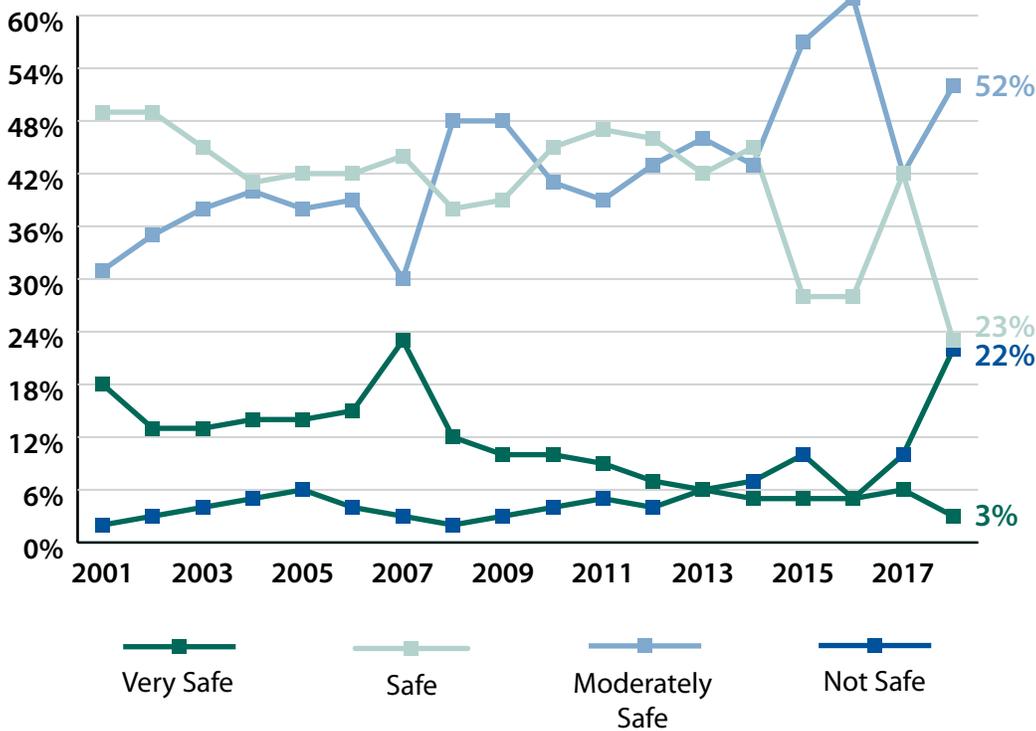


Figure 13: Downtown safety



DOWNTOWN LIVABILITY

Figure 14: Value of Holiday Lighting Program to business

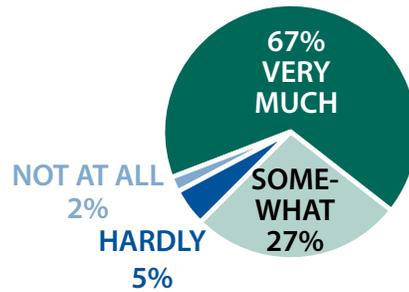


Figure 15: Most important factors for business locating or staying downtown

FACTOR	2018	2017	2016	2015	2014	2013	2012	2011	2010
Central location	1	1	1	1	1	1	1	1	1
Proximity to other businesses	2	3	2	3	3	2	4	3	2
Public transportation	3	2	3	2	2	3	2	2	3
Accessibility	4	4	4	4	4	4	5	4	4
Density of people & Atmosphere (tie)	5	5	--	--	--	--	--	--	--

Figure 16: Factors that need improvement

FACTOR	2018	2017	2016	2015	2014	2013	2012	2011	2010
Transients	1	1	1	1	2	2	2	2	2
Cleanliness	2	--	--	--	--	--	--	--	--
Panhandlers	3	2	2	2	1	1	1	1	1
Cost of parking	4	3	4	4	3	3	3	3	3
Availability of parking	5	4	3	3	4	5	4	5	5



DOWNTOWN DEMOGRAPHICS

Figure 17: Employee age and gender distribution

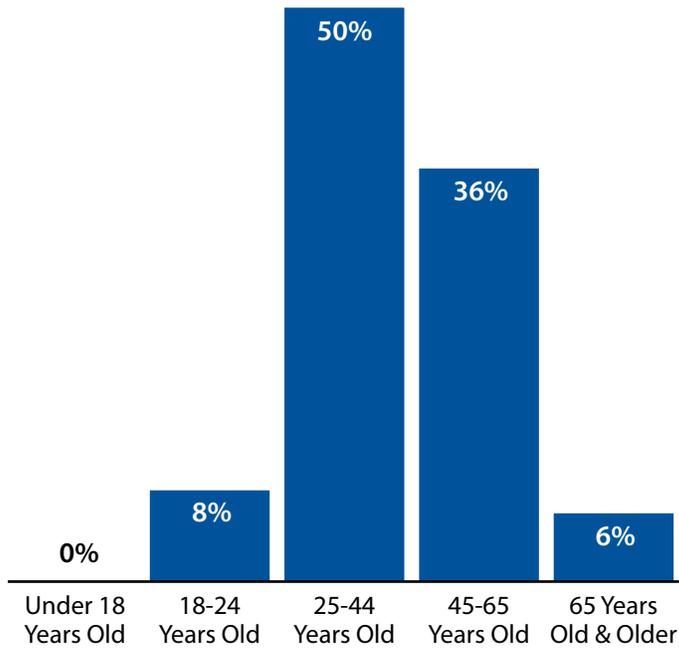
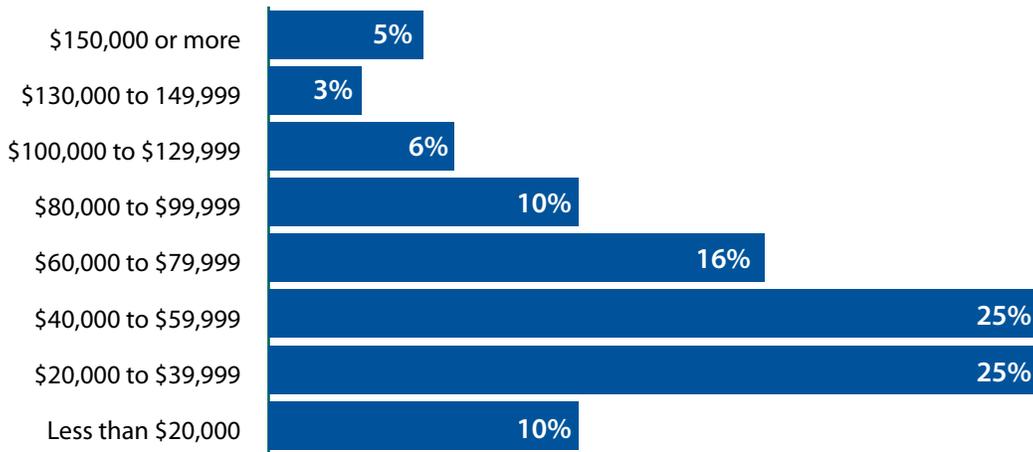


Figure 18: Annual salaries of downtown workforce



DOWNTOWN TRANSPORTATION

Figure 19: How downtown employees get to work

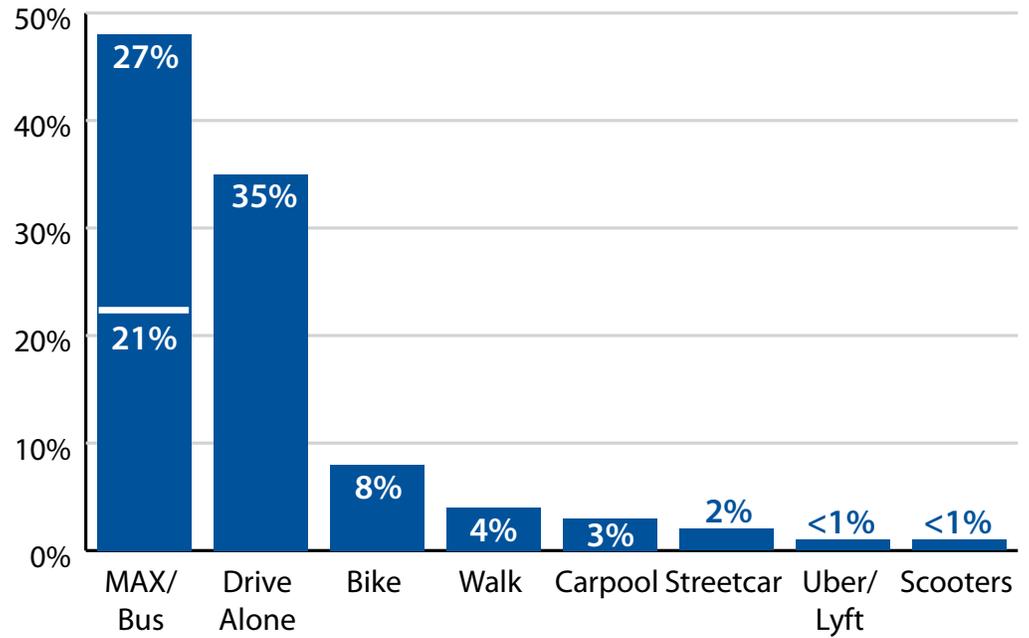
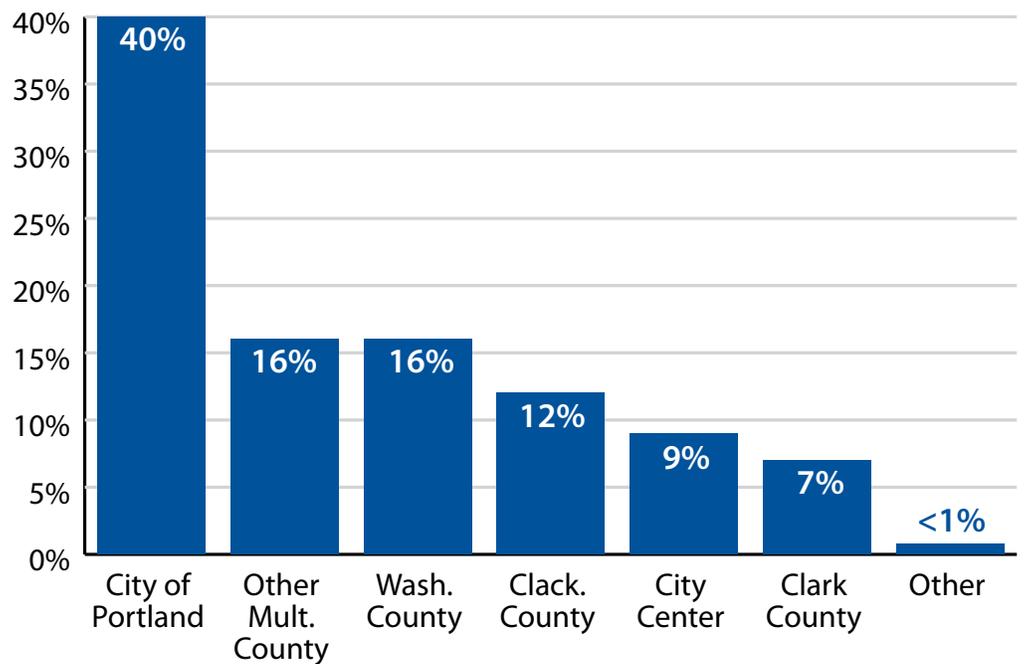
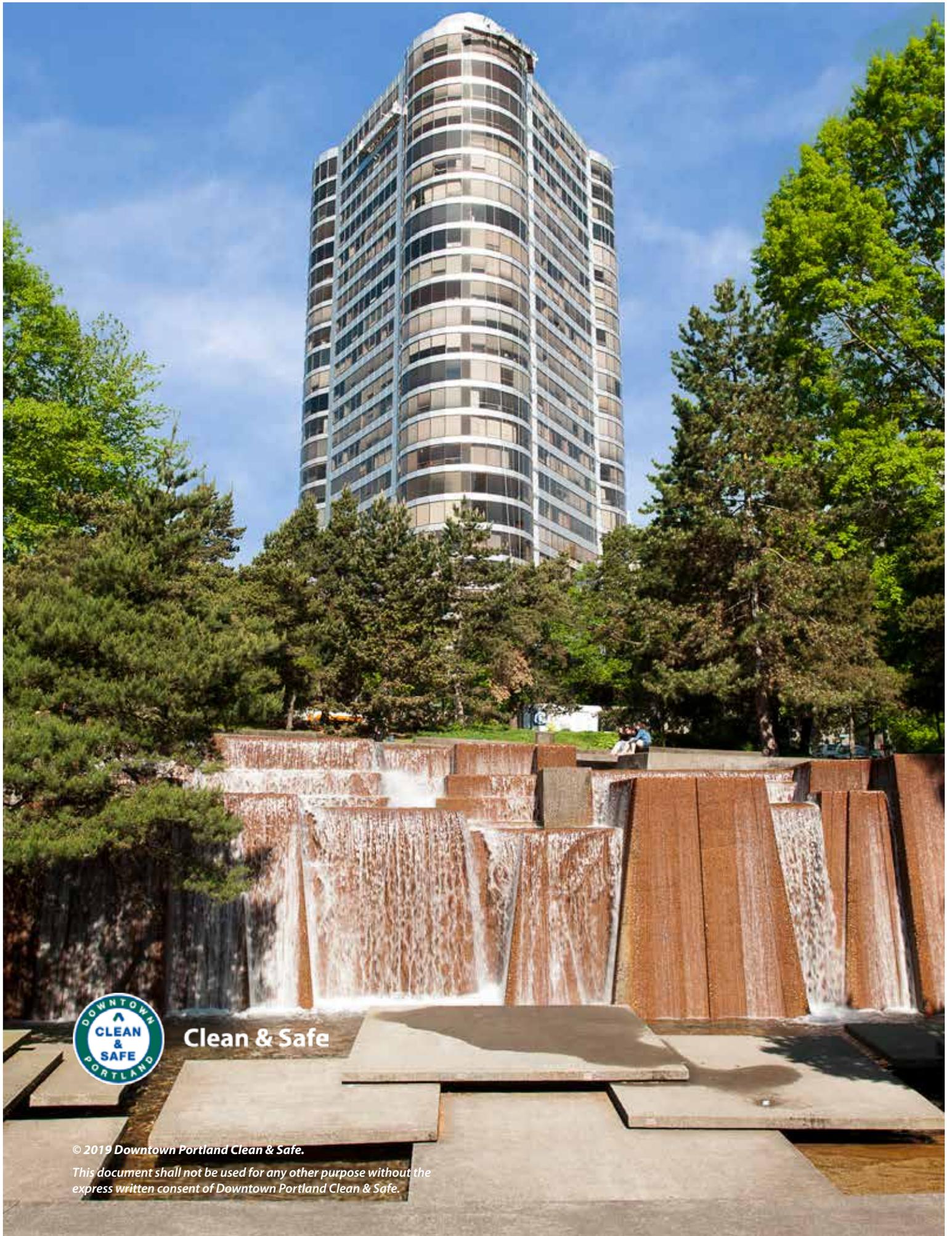


Figure 20: Downtown employee residences





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