



July 2016

Downtown Milwaukie Market Analysis

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Acknowledgements



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Executive Summary

Perfectly situated along the Willamette River with immediate access to two major highways, downtown Milwaukie is a gem waiting to be discovered. Meaningful changes have taken place since the 2009 Downtown Milwaukie Market Analysis. The recent addition of the light rail, the overwhelming success of events, growing business core, and the forthcoming Urban Renewal plan make today a better time than ever to redevelop, relocate to, and reinvigorate historic downtown Milwaukie.

The district is a place where families, community members, business owners, and out-of-town visitors come together for shopping, dining, and entertainment. There are over 21,000 employees and 19,000 residents within a five minute drive from downtown, two schools at the edge of downtown, and more than 36,000 cars that drive along Highway 99E each day. With so much untapped potential, downtown Milwaukie has tremendous opportunity for growth, change, and revitalization.

As a result of the 2016 study, three crucial takeaways emerged. First, stakeholders must ensure downtown becomes a clustered, mixed-use commercial district with housing, entertainment, retail, anchors, and services. Office workers and downtown residents are critical components of a successful district, but to make this work, stakeholders should encourage upper-level housing and office space while maintaining and growing ground floor retail space to continue to develop a thriving, active downtown.

Second, the City and the community should prioritize smart, equitable development in downtown. It is not enough to simply develop vacant properties downtown. The opportunity sites should be developed with the future in mind, which requires using new development to create thriving, mixed-use hubs with retail anchors, affordable, fresh grocery options, and housing. New development will be an essential tool used to draw commuters off of the highway and into the commercial district.

Third, businesses owners, property owners, and customers want new businesses to relocate to the area. By comparing the results of the retail demand analysis and the surveys distributed to customers, business owners, and property owners, it is clear that the priorities of the community are: a grocery store, eateries (coffee/ sandwich shop, food carts, bakery, etc.), and an apparel store.



Downtown Milwaukie has already begun to blossom into an energetic epicenter, and with commitment from the City, business owners, property owners, and the community, the district will become a welcoming destination for generations to come. Downtown is not a destination of the past, but instead, a destination of the future.

Introduction

Downtown Milwaukie has the opportunity to become a local destination and experience unprecedented success as a commercial district. With the recent addition of the MAX station at the south end of the district, the consideration of new development on the parking lot across from City Hall, and the overwhelming success of community events like First Friday and the Farmers Market, downtown Milwaukie is at a crossroads. As a district, stakeholders must choose to either rest on its laurels as a budding regional destination or continue full speed ahead as momentum builds from the successes of the recent changes and projects.



With the expertise and commitment of business owners, local residents, and the City, downtown Milwaukie will be able to offer unique visitor experience that will last for generations to come. Located at the edge of Portland, situated along the Willamette River in between Highway 99E and Highway 224, downtown Milwaukie has the potential to become a thriving destination for local shoppers.

The purpose of the 2016 Downtown Milwaukie Market Analysis is to update the previous study carried out by Marketek in 2009. While comprehensive, the previous study has not been updated in seven years. The 2009 approach is somewhat different from the updated study, but overall, the goals of gathering useful information about the district and generating solutions to its challenges remain the same.

The 2009 study utilized methodology from the Milwaukie Main Street Program, a program adapted from the Oregon Main Street program and the National Main Street Program. Marketek focused on Economic Restructuring, one of the four elements of successful revitalization. According to the National Trust for Historic Preservation, the four tenants of a successful downtown are: Promotion/Identity-Building, Design/ Physical Improvements, Economic Development and Organization. More information regarding the Main Street approach can be found at the National Trust for Historic Preservation website (preservationnation.org) or on the Oregon Main Street website (oregon.gov).

The 2016 study will focus on several fundamental questions: What are the outcomes of the 2009 study? What efforts are currently underway in downtown? Who is part of the downtown customer base? How can the business climate be described? Is there support for new businesses and general improvements? What do visitors want out of their shopping experiences? What strategies can be utilized to transform downtown into a thriving commercial district?

Outcomes of the 2009 Study

Marketek's 2009 study outlined a business development plan for the downtown area. The outcomes of the plan have varying successes, ranging from accomplished to not started. The study originally considered a period of ten years in the future, from 2009 to 2019. This section will assess the outcomes of the plan and address projects and actions that can be fulfilled within the three remaining years.

Action	Outcome
Business Development Plan	
Create a visual aid, map, or one page synopsis of the future of downtown over the next three to five years	Not started, but accomplishable soon
Share and promote the downtown vision with stakeholders	Not started, but accomplishable soon
Conduct an inventory of retail space	Accomplished in July 2016
Create a property database	Accomplished in July 2016
Identify three to five market ready properties	Accomplished in 2015
Focus on redevelopment, isolate core retail areas, encourage ground floor retail craft a one-page information sheet about priority sites	Not accomplished, but should remain a long-term goal for the district
Create a downtown business toolbox	In progress
Develop a plan to recruit new businesses to locate in downtown Milwaukie	In progress
Retail Development Strategy	
Establish a market position	In progress
Foster a mixed-use commercial district with a healthy variety of retail shopping, professional, cultural and financial services, entertainment, housing, and professional services	Ongoing
Strategically cluster businesses	Ongoing, with a cluster of antique and craft shops that organically clump
Offer façade improvement grants, prepare a list of properties ready for development, and offer incentives	Ongoing, with Metro's Storefront Improvement Grant and the City's Urban Renewal plan (October 2016), which will offer incentives

Source: City of Milwaukie and Marketek, Inc.

Changes Since 2009

Downtown Milwaukie has undergone a few meaningful changes since 2009. Some changes are incremental, such as the façade improvement grants, while others are substantial, such as the addition of the new MAX Orange Line. These changes, in combination, bring potential for a vibrant, historic change to the area.

- In June 2012, the Moving Forward Milwaukie project began and was completed in December 2015. The project was intended to remove barriers and encourage development through policy and regulation revisions guiding development in three commercial areas, including downtown Milwaukie.
- In May 2015, Riverfront Park Phase II was completed, bringing improvements and increased access to the Willamette River.
- In September 2015, the MAX Orange Line opened. This long anticipated light rail line connects downtown Milwaukie to downtown Portland.
- In September 2015, the pilot Parklet Program became a permanent program. The Parklet Program allows downtown businesses to exchange parking spaces for temporary outdoor, patio seating. Parklets are pedestrian friendly features that increase the appeal of the area.
- In the fall of 2015, the City of Milwaukie began recruiting food carts to locate on the triangle lot near the MAX station downtown.
- In January 2016, the first groups of Storefront Improvement Grant applications were reviewed. The ongoing Metro grant matches existing funds for any façade, signage, or lighting improvements.
- In April 2016, the City of Milwaukie began working to create a Downtown Systems Wayfinding Plan. This plan will bring increased navigability for visitors, including those exiting the MAX at the south end of town and those driving on McLoughlin Blvd.
- In May 2016, voters passed the bond issue that will bring improvements to the Ledding Library and the Pond House.
- In May 2016, construction of the multiuse SE 17th Avenue trail began. The project will improve connectivity and access for bicyclists and pedestrians from the Trolley Trail to the Springwater Corridor.
- In June 2016, City Council began considering plans to develop the Texaco lot that is currently used as a parking lot across from City Hall and the Cash Lot at the southwest corner of Main Street and Washington Street. A number of plans are currently being considered, including multi-story mixed use (commercial and residential) building, low income housing, and no development at all.



Project Purpose

The purpose of this analysis is to:

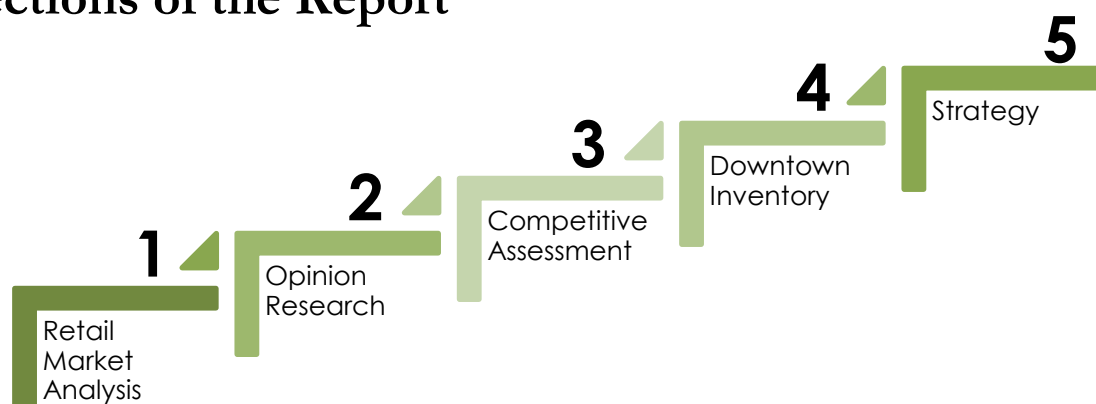
- Update the Downtown Milwaukie Market Analysis & Business Development Strategy conducted by Marketek in 2009
- Provide a complete and detailed portrait of the retail market potential in the downtown area
- Examine the current downtown retail industry by examining supply, consumer demand and preferences, and current opportunities for expansion and growth
- Develop quantitative and qualitative data that the City can use to capture more consumer spending and grow the retail base in the downtown area
- Highlight strategies for business development and commercial district improvement
- Provide an inventory of businesses, properties, and streetscape amenities

Project Methodology

The 2016 Market Analysis update takes into account the 2009 Market Analysis while also looking forward to the future. Ten years is a realistic time period for substantive changes to take place. A variety of tools were used to generate an accurate, holistic picture of the current and future state of the downtown area.

- Surveys of business owners
- Surveys of shoppers
- Surveys of property owners
- Statistical analysis of current and future retail demand and leakage
- ArcGIS Collector application to document physical details of buildings, businesses, and streetscape amenities

Sections of the Report



Retail Market Analysis

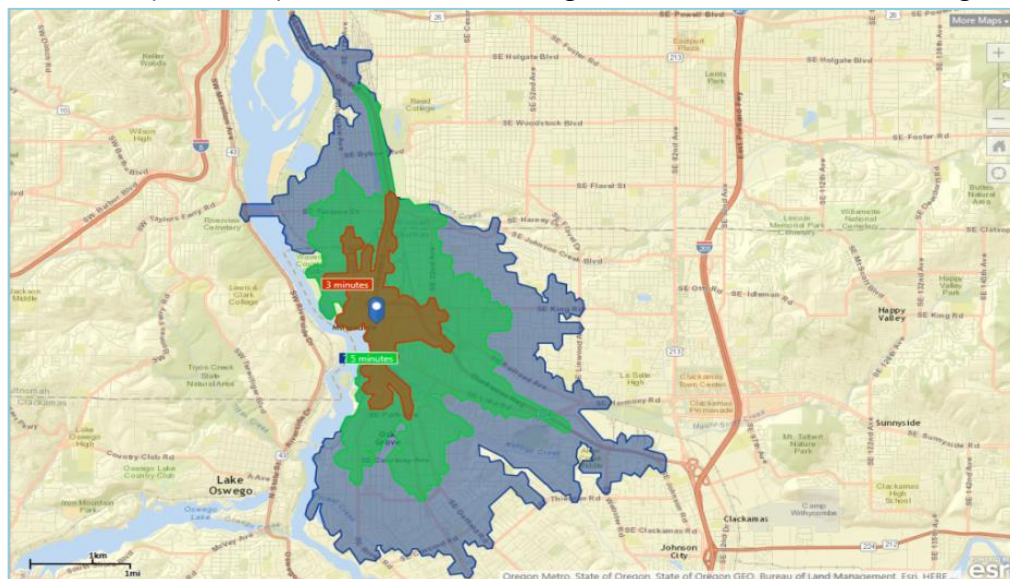
The retail market analysis relies on trade area data to generate an accurate picture of customer expenditures. These customers are likely to either live or work nearby. The retail market analysis contains maps of defined trade areas, demographic data, employment data, housing data, and a retail demand potential analysis. This section examines who is likely to visit downtown, what they purchase, and potential additional supportable downtown retail.

Trade Area and Target Market Analysis

Trade area is a tool used to describe potential customers for downtown businesses. The 2016 study uses two different trade areas for comparison: the drive time model and the walk time model. These target areas were used because they allow the centralized, intra-area market to be represented. It is unlikely that visitors from other neighborhoods with business districts will visit the downtown Milwaukie business district. All of the models use City Hall as the center of downtown (10722 SE Main St. Milwaukie, OR 97222).

Figure 1. Drive Time Model

The drive time model shows drive times of three, five, and seven minutes from the center of downtown. For perspective, a three minute drive is about a 1.5 mile area. The model only encompasses residents living east of the river. According to the customer

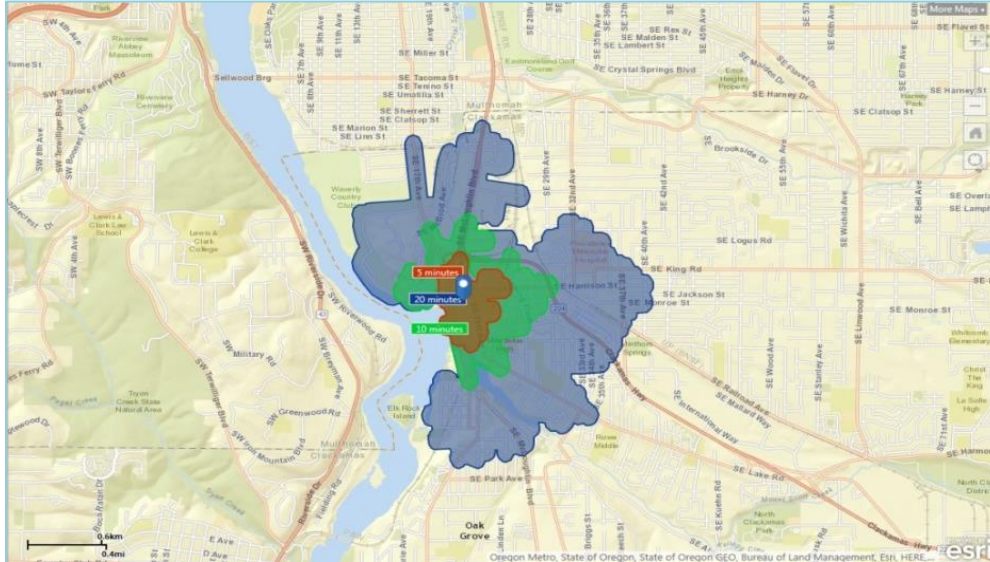


intercept survey, 44% of respondents live more than one mile away from the downtown area. Over 36,000 cars use Hwy 99E and nearly 25,000 cars use Hwy 224 each day.

Source: ESRI BAO

Figure 2. Walk Time Model

The walk time model shows walk times of five, ten, and twenty minutes from the center of downtown. For perspective, a twenty minute walk is about one mile for an able-bodied individual. The walk time model is useful because it includes residents east of



Source: ESRI BAO

the river and considers visitors who live close enough to walk downtown for recreation. The model is also helpful method to include pedestrians who might use the Orange Line to get downtown.

Figure 3. 2009 Milwaukie Market Area

In the 2009 report, trade area was defined as an 8-10 minute drive from downtown, bounded by I-205 to the east and the Willamette River to the west. This area included



Source: ESRI BAO

neighborhoods such as Sellwood, Eastmoreland, and Westmoreland, which are higher income neighborhoods. Additionally, business districts within those higher income communities were included along with Clackamas Town Center and Clackamas Promenade.

Demographics: Drive Time

There are 3,172 people and 1,487 households within a 3 minute drive from downtown, 19,716 people and 9,475 households within a 5 minute drive from downtown, and 44,566 people and 19,749 households within a 7 minute drive from downtown. The 2009 study cited a target market area of 96,835 people, but the larger population is reflective of the larger area outlined in the 2009 study (as shown on page 8). The median household income is \$40,785 for residents living within a 3 minute drive from downtown, \$45,291 for residents living within a 5 minute drive from downtown, and \$52,246 for residents living within a 7 minute drive from downtown. The 2009 study's target market area had a median household income of \$56,533. Median age ranges from 41.7 to 42.5 years, as compared to 38.8 years in the 2009 study. The vast majority of the population is white (87.7-88.2%). The 2009 study cited 86.5% of the population as white.

Figure 4. Demographics

Demographic Indicator	3 Minute Drive	5 Minute Drive	7 Minute Drive
Population			
2015	3,172	19,716	44,566
2020	3,256	20,217	45,955
Percent Change	2.6%	2.5%	3.1%
Households			
2015	1,487	9,475	19,749
2020	1,532	9,748	20,401
Percent Change	3.0%	2.9%	3.3%
2015 Average Household Size	2.10	2.06	2.24
2015 Median Household Income	\$40,785	\$45,291	\$52,246
Median Age (Years)	42.5	41.7	42.0
Race			
White	87.7%	87.7%	88.2%
Black	2.0%	1.8%	2.0%
American Indian	1.3%	1.1%	1.0%
Asian	2.6%	2.7%	2.7%
Pacific Islander	0.3%	0.3%	0.3%
Other Race	2.0%	2.2%	2.4%
Two or More Races	4.1%	4.3%	4.1%
Hispanic (Any Race)	6.6%	6.9%	7.2%
Homeownership	31.3%	40.4%	50.8%
Educational Attainment			
Some College, No Degree	31.8%	29.4%	27.6%
Bachelor's Degree	20.1%	21.7%	22.2%

Source: ESRI BAO

Demographics: Walk Time

There are 333 people and 194 households within a 5 minute walk from downtown, 1,228 people and 625 households within a 10 minute walk from downtown, and 5,994 people and 2,905 households within a 20 minute walk from downtown. The median household income is \$34,804 for residents living within a 5 minute walk from downtown, \$36,210 for residents living within a 10 minute walk from downtown, and \$40,146 for residents living within a 20 minute walk from downtown. The 2009 study's target market area had a median household income of \$56,533. Median age ranges from 40.6 to 45.4 years, as compared to 38.8 years in the 2009 study. The vast majority of the population is white (88.0 to 88.9%). The 2009 study cited 86.5% of the population as white.

Figure 5. Demographics

Demographic Indicator	5 Minute Walk	10 Minute Walk	20 Minute Walk
Population			
2015	333	1,228	5,994
2020	349	1,258	6,069
Percent Change	4.8%	2.4%	1.25%
Households			
2015	194	625	2,905
2020	204	643	2,952
Percent Change	5.2%	2.9%	1.6%
2015 Average Household Size	1.71	1.95	2.05
2015 Median Household Income	\$34,804	\$36,210	\$40,146
Median Age (Years)	45.4	40.6	43.2
Race			
White	88.9%	88.4%	88.0%
Black	1.5%	1.4%	1.9%
American Indian	0.9%	1.3%	1.3%
Asian	3.0%	2.9%	2.5%
Pacific Islander	0.6%	0.3%	0.4%
Other Race	0.9%	1.5%	2.1%
Two or More Races	4.2%	4.3%	3.8%
Hispanic (Any Race)	3.3%	4.8%	6.2%
Homeownership	24.5%	27.7%	33.6%
Educational Attainment			
Some College, No Degree	35.1%	32.5%	33.3%
Bachelor's Degree	20.6%	20.0%	20.5%

Source: ESRI BAO

Employee Market

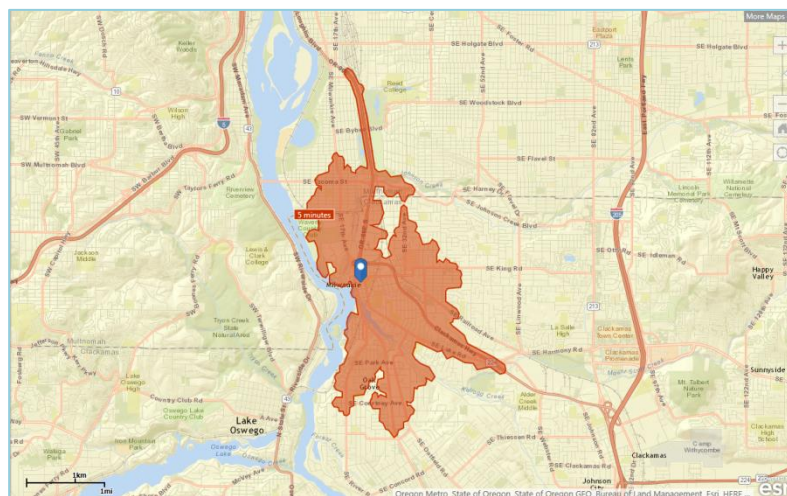
Employment: Drive Time

Approximately 1,158 businesses operate within a five minute drive from downtown. In total, 21,226 people work at these businesses. The 2009 study calculated the employee market based on a 2-mile radius from downtown. Using the 2-mile radius from downtown, the study calculated 1,750 businesses and 22,700 employees in the area. In 2009, the largest number of employees worked in the services sector (39%), followed by retail trade (20%) and manufacturing (16%). In the 2016 study, the largest number of employees work in the wholesale trade industry (40.6%), followed by services (21.8%) and retail trade (17.1%).

Figure 6. Employment, 5 Minute Drive Time

Industry	Businesses		Employees	
	#	%	#	%
Agriculture and Mining	20	1.7%	84	0.4%
Construction	98	8.5%	1,222	5.8%
Manufacturing	32	2.8%	1,424	6.7%
Transportation	30	2.6%	231	1.1%
Communication	7	0.6%	138	0.7%
Electric/Gas/Water/Sanitary Services	0	0.0%	0	0.0%
Wholesale Trade	60	5.2%	8,628	40.6%
Retail Trade	264	22.8%	3,639	17.1%
Finance/Insurance/Real Estate	143	12.3%	668	3.1%
Services	422	36.4%	4,628	21.8%
Government	23	2.0%	496	2.3%
Other	58	5.0%	68	0.3%
Total	1,158	100.0%	21,226	100.0%

Source: ESRI BAO



Source: ESRI BAO

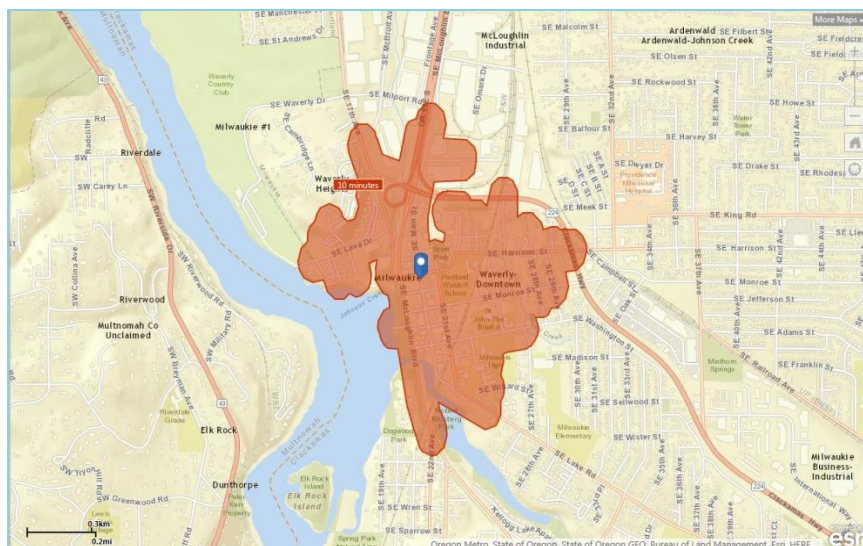
Employment: Walk Time

Approximately 241 businesses operate within a ten minute walk from downtown. In total, 2,907 people work at these businesses. The 2009 study calculated the employee market based on a 2-mile radius from downtown. Using the 2-mile radius from downtown, the study calculated 1,750 businesses and 22,700 employees in the area. In 2009, the largest number of employees worked in the services sector (39%), followed by retail trade (20%) and manufacturing (16%). In the 2016 study, the largest number of employees work in the services industry (32.4%), followed by retail trade (28.5%) and construction (12.6%).

Figure 7. Employment, 10 Minute Walk

Industry	Businesses		Employees	
	#	%	#	%
Agriculture and Mining	3	1.2%	16	0.6%
Construction	16	6.6%	367	12.6%
Manufacturing	2	0.8%	18	0.6%
Transportation	7	2.9%	58	2.0%
Communication	1	0.4%	3	0.1%
Electric/Gas/Water/Sanitary Services	0	0.0%	0	0.0%
Wholesale Trade	11	4.6%	290	10.0%
Retail Trade	57	23.7%	828	28.5%
Finance/Insurance/Real Estate	30	12.4%	179	6.2%
Services	89	36.9%	942	32.4%
Government	11	4.6%	193	6.6%
Other	13	5.4%	14	0.5%
Total	241	100.0%	2,907	100.0%

Source: ESRI BAO



Source: ESRI BAO

Area employees are vital components of thriving downtown districts. According to a 2012 study conducted by the International Council of Shopping Centers, office workers spend \$195 per week on costs associated with commuting and expenditures near the workplace. Furthermore, office workers spend 14% of their incomes on eateries and restaurants and another 19% of their incomes at grocery stores. The study also found that office workers spend more when there are more retail, restaurant, and service offerings nearby.

Housing

Nearby, occupied housing helps ensure the success of a business district because it provides a built-in customer base. While there is some housing available outside of the downtown boundaries, the downtown Milwaukie business district lacks a sufficient amount of housing. At this time, downtown has 113 units and 95.6% of the units are occupied. 25.7% of the units are occupied by owners and 69.9% of the units are occupied by renters. The median value of housing units is \$316,667. According to AreaVibes.com, median rent in Milwaukie is \$919. The North Main Village, which was completed in 2006, is the main source of downtown housing. There are 97 units in total: 64 rental apartments, 13 townhomes (which are live-work units), and 20 condos (which are located over retail uses).

Figure 8. Housing, Drive Time

Housing	3 Minute Drive	5 Minute Drive	7 Minute Drive
Total Housing Units	1,601	10,260	21,079
Occupied Units	92.9%	92.3%	93.7%
Owner	31.3%	40.4%	50.8%
Renter	61.6%	52.0%	42.9%
Vacant	7.1%	7.7%	6.3%
Median Value	\$258,333	\$273,138	\$285,241
Median Rent	\$919	\$919	\$919

Source: ESRI BAO and AreaVibes.com

Figure 9. Housing, Walk Time

Housing	5 Minute Walk	10 Minute Walk	20 Minute Walk
Total Housing Units	199	675	3,170
Occupied Units	93.3%	92.7%	91.6%
Owner	24.5%	27.7%	33.6%
Renter	68.8%	65.0%	58.0%
Vacant	6.7%	7.4%	8.4%
Median Value	\$325,000	\$276,220	\$246,983
Median Rent*	\$919	\$919	\$919

Source: ESRI BAO and AreaVibes.com

Retail Demand Potential

Using data from ESRI BAO and *Dollars and Cents of Shopping Centers* by the Urban Land Institute, existing retail demand potential was estimated for the areas associated with a 5 minute drive and a 20 minute walk.

Retail demand potential can be determined by calculating supply and demand. Demand is derived by estimating the total expected amount of money customers living the market area spend at retail establishments inside and outside of the trade area. Supply is derived by estimating the amount of retail sales of businesses located inside the trade area. In order to determine the retail gap, supply is subtracted from demand. If demand is greater than supply, there is leakage. Leakage means that consumers spend money outside of the trade area on a particular good, which leaves potential for new businesses to move inside the trade area to capture money spent elsewhere. If supply is greater than demand, there will be a surplus. A surplus means that consumers from outside of the trade area to spend money inside of the trade area on a particular good or service and it is unlikely that new businesses could be supported.

In order to calculate the amount of additional supportable retail space for a particular type of good, the retail gap can be converted into square feet. Target sales (in dollars per square foot) are estimated by the Urban Land Institute in the *Dollars and Cents of Shopping Centers*. Potential supportable space was determined by dividing retail gap by target sales per square foot. Though consumers will always spend some of their incomes outside of the trade area, the retail demand potential analysis provides a realistic measure of the goods available in the trade area.



Demand is divided up into nine categories of goods: apparel, home furnishings, electronics & appliances, home improvement, hobby & lifestyle, miscellaneous store retailers, grocery, health & personal care, and eateries. NAICS codes and a full listing of the items included in each category can be found in Appendix C.

For the 5 minute drive trade area, leakage exists in four merchandise categories: apparel, electronics & appliances, grocery, and eateries. Leakage totals \$18,136,718, which translates to 69,142 square feet of potential supportable space. For the 20 minute walk trade area, leakage exists in three categories: apparel, electronics & appliances, and grocery. Leakage totals \$11,090,016, which translates to 35,549 square feet of potential supportable retail space.

Figure 10. Existing Retail Balance, 5 Minute Drive

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Target Sales (\$/SF)	Potential Space
Apparel	\$14,859,447	\$14,714,481	\$144,966	\$209	693
Home Furnishings	\$7,782,750	\$11,256,311	-\$3,473,561	–	–
Electronics & Appliances	\$18,121,658	\$13,320,222	\$4,801,436	\$199	24,127
Home Improvement	\$12,781,520	\$52,679,454	-\$39,897,934	–	–
Hobby & Lifestyle	\$8,377,067	\$43,007,178	-\$34,630,111	–	–
Misc. Store Retailers	\$16,101,109	\$34,299,180	-\$18,198,071	–	–
Grocery	\$49,657,760	\$39,463,857	\$10,193,903	\$353	28,877
Health & Personal Care	\$14,832,390	\$31,751,933	-\$16,919,543	–	–
Eateries	\$10,846,592	\$7,880,179	\$2,996,413	\$194	15,445
Total Leakage					\$18,136,718
Est. Supportable Sq. Ft.					69,142 sq. ft.

Source: ESRI BAO and Urban Land Institute

Figure 11. Existing Retail Balance, 20 Minute Walk

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Target Sales (\$/SF)	Potential Space
Apparel	\$4,059,651	\$2,449,872	\$1,609,779	\$209	7702
Home Furnishings	\$2,131,785	\$5,568,548	-\$3,436,763	–	–
Electronics & Appliances	\$4,924,192	\$4,472,520	\$451,672	\$199	2270
Home Improvement	\$3,457,060	\$7,386,414	-\$3,929,354	–	–
Hobby & Lifestyle	\$2,298,432	\$37,881,931	-\$35,583,499	–	–
Misc. Store Retailers	\$4,497,526	\$16,063,013	-\$11,565,487	–	–
Grocery	\$13,763,928	\$4,735,363	\$9,028,565	\$353	25,577
Health & Personal Care	\$4,119,660	\$10,785,077	-\$6,665,417	–	–
Eateries	\$2,958,699	\$4,685,127	-\$1,726,428	–	–
Total Leakage					\$11,090,016
Est. Supportable Sq. Ft.					35,549 sq. ft.

Source: ESRI BAO and Urban Land Institute

Influenced by a number of factors, retail demand is a complex and always-changing process. Factors that influence retail demand include availability and quality of retail space, current anchors, and incentives. Downtown Milwaukie should aim to offer a variety of quality, unique goods.

Downtown Milwaukie does not exist as the sole commercial district in the area, and as a result, the district competes with a host of other successful commercial centers nearby. Some of these commercial districts are: Sellwood, Clackamas Town Center and Clackamas Promenade, the 82nd Avenue Corridor, and the McLoughlin Corridor. Even if downtown Milwaukie only focused on capturing 20% of the sales leakage, \$2,218,003 (20 minute walk) to \$3,627,344 (5 minute drive) of sales could be captured.

Numerous factors will influence Milwaukie's ability to capture and support new retail space, including the City's commitment to developing unused lands, owners' commitment to redeveloping current properties, marketing strategies, and consistent, robust leadership.

Opinion Research

Three surveys were distributed to the community during the months of June and July, 2016: the business owner survey, the property owner survey, and the customer intercept survey. Paper copies of the business owner surveys were distributed in-person to 137 downtown business owners. Business cards with links to the electronic version of the survey were attached. Paper copies with links to the electronic version of the property owner survey were mailed to 97 downtown property owners, though 4 mailings were returned due to incorrect addresses. Customer intercept surveys were conducted using paper surveys at the Milwaukie Farmers Market on June 26 and July 10 as well as at the downtown MAX station. Business cards with links to the electronic version of the survey were distributed at the July 8th First Friday and the Ledding Library.



MILWAUKIE
Dogwood City of the West

**2016 Downtown
 Milwaukie
 Market Analysis**

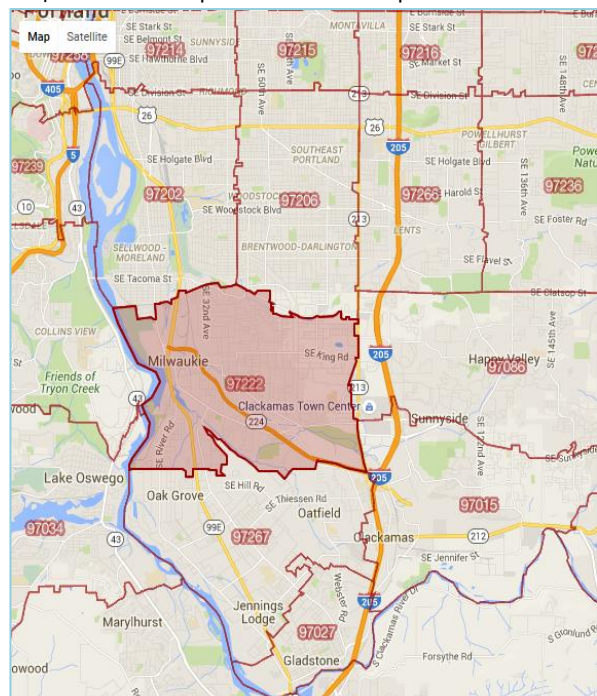
We need your input!

Consumer Survey:
[www.surveymonkey.com/
 r/milwaukieconsumers](http://www.surveymonkey.com/r/milwaukieconsumers)



Customer Intercept Survey Highlights

- Seventy-two downtown visitors completed the survey. Of the 72 respondents, 57% of respondents were female and 43% were male. 35 percent of respondents were ages 35 to 44 and 18% were ages 25 to 34. 42 percent of respondents had a household annual income of \$45,000 to \$74,999. 64 percent of respondents live in the 97222 zip code and 22% live in the 97267 zip code.
- Downtown Milwaukie is not meeting the needs of area residents, according to 53% of respondents
- Most downtown respondents shop downtown one to two times per week (54%)
- Sunday is the most popular day for respondents to shop in downtown (75%)
- 11am-1pm is the most popular time of day for shopping in downtown (54%)
- Portland (69%) and Sellwood (64%) are downtown's largest competitors
- The Farmers Market (68%) and the Ledding Library(32%) most frequently bring respondents downtown



Source: Oregon Hometown Locator

- The top reasons respondents visit the downtown locations they do are: walkability/ease of access (60%), places to eat (45%), and quality of businesses (43%).
- Almost all respondents consider it pleasant and safe to walk downtown (95%)
- The most frequently used mode of transportation to get downtown is driving (35%), followed by walking (23%), biking (21%), and public transit (20%)
- Many respondents said they live one or more miles from downtown (44%), others live half to one mile away (33%), and few live one to five blocks away (14%)
- Respondents would like to see the following downtown improvements: improved storefronts (41%), more benches (33%), and more trees/landscaping (27%)
- Respondents think the following types of businesses should be located downtown: fresh food market (67%), grocery store (62%), and bookstore (44%)

Business Owner Survey Highlights

- Forty-one business owners (30%) completed a survey (41 out of 137 surveys returned)
- Nearly 68% of business owners rent their space, with a median monthly rent price of \$1250 and a median size of 2,100 square feet
- The hours of downtown businesses are inconsistent, but there are more businesses open on weekdays than on weekends
- Almost half of respondents said they plan major sales in November (43%) and December (43%)
- Monday is the busiest day of the week for 48% of respondents. Sunday is the least busy day of the week, with 14% of businesses reporting it as the busiest day
- Downtown employees travel varying distances to work each day. 38% of employees travel 5 to 10 miles, 34% of employees travel 1 to 5 miles, and 28% of employees travel more than 10 miles
- Most respondents have five or fewer employees and 43% of respondents have one to two employees
- The majority of employees (97%) drive to work and they typically park on-site (62%)
- Respondents are very satisfied (50%), satisfied (38%), or neutral (12%) with their current location
- Most respondents have no plans to expand, reduce, or relocate in the foreseeable future (63%)
- For 67% of respondents, business has improved over the past five years
- Most customers live nearby for 75% of respondents



MILWAUKIE
Dogwood City of the West

**2016 Downtown
Milwaukie
Market Analysis**

We need your input!

Business Owner Survey:
www.surveymonkey.com/r/milwaukiebusinesses



- The characteristics respondents think are most important to the health and vitality of downtown are: cleanliness (63%), number of parking space (63%), and quality of businesses (60%)
- The challenges respondents think downtown is dealing with are: limited foot traffic (35%), regulations or codes (31%), and visual appeal of downtown (28%)
- 24% of respondents noted that parking was a challenge in the other section

 1. Respondents consider the following strengths of doing businesses in downtown: location (73%), cost of rent (37%), and transit access (37%)
 2. Events generate more business activity downtown. 43% of respondents said the Farmers Market generates the most business activity and 26% of respondents said First Friday generates the most business activity
 3. Respondents reported mixed views of the impact of the Orange Line. While 35% of respondents said there are more people downtown now, 32% of respondents said there have been no changes. Some respondents noted that sales have decreased and other respondents reported an increase in garbage in the area
 4. Five businesses are interested in the Parklet Program, and fourteen respondents are unsure if they are interested in the program
 5. Most respondents (70%) know about the Downtown Milwaukie Business Association and most respondents (74%) would like networking opportunities from the DMBA
 6. Respondents think the following types of businesses should be located near their business: grocery store (47%), clothing store (38%), and coffee/sandwich shop (34%)

Property Owner Survey Highlights

- Fifteen property owners (16%) completed a survey (15 out of 93 surveys returned)
- Half of respondents rated the condition of their property as an A on an A-F scale
- The majority of respondents (85%) have on-site parking at their property, with 67% responding that they had 1-5 parking spots available
- Almost eighty percent of respondents (79%) said their property is fully occupied
- Property owners are making improvements to their property: 77% made some type of improvement to their property in the last year, but only one property owner used the Storefront Improvement Grant
- 67% of respondents would like to make improvements to their property



MILWAUKIE
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Milwaukie
Market Analysis**

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Property Owner Survey:
www.surveymonkey.com/r/milwaukiepropertyowners



- Almost half of property owners (46%) want to own more property in the Milwaukie
- Events generate more business activity downtown. The majority of respondents (81%) said the Farmers Market generates business activity
- Respondents have conflicting views regarding the addition of the Orange Line. While 42% of respondents said that there are more people downtown since the addition of the Orange Line, 25% said there have been no changes, and 8% said there are fewer people downtown
- The characteristics respondents think are most important to the health and vitality of downtown are: safety (84%), quality of businesses (77%), and cleanliness (69%)
- The challenges respondents think downtown is dealing with are: limited foot traffic (55%), visual appeal of downtown (36%), out-of-city competition (18%), and no challenges (18%)
- Respondents consider the following strengths of doing businesses in downtown: location (90%), transit access (60%), and accessible parking (50%)
- Respondents think the following types of businesses should be located downtown: grocery store (67%), bakery (47%), and fresh food market (40%)



Competitive Assessment

In 2009, Marketek cited the characteristics of a healthy, thriving commercial district. These characteristics continue to be central to the success of downtown Milwaukie.

Access and Linkages	Factors Affecting Retail Location
<ul style="list-style-type: none"> ▪ Good visibility ▪ Walkability (pedestrian friendly) ▪ Transportation/transit access ▪ Good signage ▪ Parking availability 	<ul style="list-style-type: none"> ▪ Compatible land use patterns ▪ Property values (realistic) ▪ Rent levels (realistic) ▪ Organized promotions ▪ Good downtown management ▪ Business compatibility
Uses and Activities	Image
<ul style="list-style-type: none"> ▪ Overall active use – street life in daytime and evening ▪ Destination attractions nearby ▪ Mix of stores/services – active business clusters ▪ Frequency of events ▪ Local entrepreneurship ▪ Quality of goods and services ▪ Stable/improving real estate values 	<ul style="list-style-type: none"> ▪ Welcoming physical appearance – friendly, green, attractive landscape ▪ Sense of pride and ownership ▪ Benches, garbage cans, and bike racks ▪ Unique atmosphere ▪ Safe

Source: Marketek, Inc.

The factors listed above are particularly useful when considering a historic area. Historic areas need to be a unique destination in order to compete with shopping malls, lifestyle centers, and big box retailers. It is not enough for commercial districts to have a handful of the characteristics listed above, but instead, historic districts must constantly strive to craft a welcoming, unique image to retail long-time visitors and draw in new customers. Nearby competition includes, but is not limited to, Sellwood, McLoughlin Corridor, Clackamas Town Center, and the 82nd Avenue Corridor. The Competitive Assessment considers two perspectives:



- The customer experience
- The business climate and factors that contribute to businesses considering the decision to relocate downtown

The assessment below provides insight into the strengths, challenges, and opportunities currently facing downtown Milwaukie. The competitive assessment is an update to 2009 version. Though some of the same observations remain, downtown has also undergone changes since the last assessment.

Geography/Description

- Downtown is bounded by Hwy 224 to the north, Lake Rd. to the south, 21st Ave. to the east, and Hwy 99E (McLoughlin Blvd.) to the west. The core area of downtown is bounded by Scott St. to the north and Adams St. to the south.

Strengths and Assets

2016, updated from 2009

- Connected, compressed business district with walkability
- Significant market potential with over 42,000 people and over 36,000 employees within a seven minute drive
- Multiple business anchors that provide a customer base that can be captured, such as Dark Horse Comics offices and Advantis offices
- Multiple civic and community anchors, such as City Hall, Masonic Lodge, Post Office, Waldorf School, Milwaukie High School, and the Ledding Library, that draw visitors downtown daily
- Nearness to the Willamette River
- Public and private interest in making investments in downtown, including the new streetscape amenities and light rail added by Trimet
- Multiple isolated areas of valuable, energetic businesses to serve as catalysts for the entire area
- Expanding, popular Farmers Market that draws visitors from outside of the area and the city
- Citywide visioning plan, All Aboard Milwaukie, will provide a foundation for the future of the city, including the downtown commercial district
- Events such as the Art Walk, the Summer Concert Series, Dogwood Days, and many others bring visitors to downtown
- Formation of the Downtown Milwaukie Business Association, which is instrumental in promoting events, such as First Friday and Coffee and Clean-Up, and providing networking opportunities
- Downtown competes with several neighborhood business districts in the area

Challenges

2016, updated from 2009

- Mixed building quality and the prevalence of parking lots disrupt the pace of downtown
- False perception of a lack of parking downtown
- Looming absence of confidence by some downtown stakeholders limits progress
- While some additional retail businesses have moved downtown, a lack of retail remains
- Prime retail space occupied by offices
- Lack of façade, storefront, and signage appeal makes businesses uninviting to pedestrians
- Industrial land use in a commercial district
- Retail mix is dispersed
- Few people live downtown as a result of a lack of housing in the district
- Island effect of the Willamette River to the west and Hwy 224 to the east

Opportunities

2016, updated from 2009

- New addition of the light rail station now serves as an anchor with opportunities to draw more visitors and increase accessibility
- Opportunity sites available to better link downtown, including the lot in the southeast corner of Washington and Hwy 99, the Harrison and Main St. lot across from City Hall, and the triangle lot near the MAX station
- Small groups of business vitality to serve as a catalyst for the expansion of the downtown business and customer base
- Gas stations along McLoughlin Blvd. provide potential for cross marketing to lure commuters to stop downtown
- Group promotion potential by clustering restaurants, antique stores, home furnishings/design, and health and wellness – create an antique mall row map and a downtown business directory
- High-traffic destinations nearby to create package promotions with downtown including Providence Hospital, Pendleton Woolen Mill Store, and Bob's Red Mill restaurant/retail shop
- Urban Renewal Plan development underway that will create funds for downtown improvements and incentives for private investment
- May 2016 passage of the bond issue that will improve Ledding Library and Pond House could signal public interest in revitalizing downtown
- Programs such as the Parklet program and the Storefront Improvement Grant provide resources and opportunity to enhance the appeal of downtown
- Food cart recruitment initiative adds potential for increased business activity and restaurant incubation
- Portland MSA population surge allows potential for downtown Milwaukie to be part of the historic growth
- Resurgence of the economy fosters a healthy business climate and visitors with extra disposable income

Source: City of Milwaukie and Marketek, Inc.

Strengths



Several successful downtown events that draw hundreds of visitors



MAX light rail anchors the south end of downtown



Small nodes of business energy to build upon

Challenges



Office space takes up a significant amount of prime retail space



Parking lots and inconsistent architectural style disrupt the rhythm of the district



Industrial land use in a commercial district

Opportunities



Potential for expansion of the Parklet Program and Storefront Improvement Grant



Opportunities for development of unused sites



Bond Issue passage signals renewed public interest

Downtown Inventory

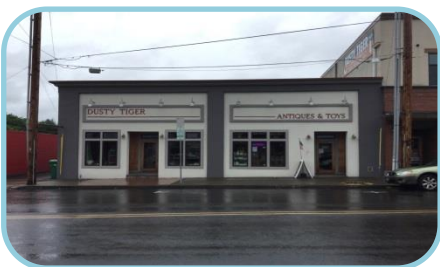
As part of the market analysis, an inventory of downtown businesses, buildings, and streetscape amenities was conducted. Using ArcGIS software and the Collector



application, data was collected and summarized in a final map that will be used to analyze needs for improvement, relocation, and updates. The black line indicates the downtown area and yellow lines denote parcels. Highlighted data includes: pedestrian lighting (historic, cobra, or ballard), café seating, benches, bike racks, water spigots (public or private), street tree (grate or no grate), trashcans, Oregon Department of Transportation (ODOT) signage, property information, and business information. Condition, street frontage, and use

were collected for properties and businesses. Photographs of streetscape amenities, properties, buildings, and businesses were also collected during the inventory. The inventory was conducted during the months of June and July, 2016. The Downtown Milwaukie Market Analysis & Business Development Strategy conducted by Marketek in 2009 did not include an inventory of downtown.

Downtown Inventory Findings



Strategy and Recommendations

Promote Vision and Dispel Myths

Stakeholders must come together to establish a market position. This identity will guide efforts to change, improve, and revitalize the commercial district while also creating unity amongst stakeholders. When discussing the vision for the area, the common message should also work to dispel myths. Though parking occupancy only reached 42.5% in the September 2015 parking study, business owners frequently note that there is a lack of parking downtown. This false messaging not only creates an inaccurate perception of the district but is also not an accurate reflection of customer opinions. In the customer survey, 90% of respondents rated downtown parking as average, good, or excellent. Myths should be dispelled and a unified vision should be elevated.

Capitalize on Energy from the Success of Events

The Farmers Market, First Friday, and other events draw thousands of visitors downtown and there is ample opportunity to use these events to draw customers inside existing businesses and draw new businesses to the area. These customer bases should be captured by targeted marketing and ensuring businesses are open during the hours of the events. While this may seem mundane, only 39% of businesses that completed a business owner survey were open on Sundays. Businesses forego an opportunity to capture large amounts of foot traffic from the Farmers Market. The energy can also be used to establish regional arts and entertainment destinations, encourage community members to shop local, and build momentum for new development.

Property Development

Downtown Milwaukie has three city-owned opportunity sites that are ready for development: the triangle lot near the MAX station, the parking lot across from City Hall, and the Cash lot at the southwest corner of the intersection of Washington St. and Main St. These sites offer key opportunities to develop mixed-use buildings as well as a food cart pod for business incubation. Because two of the lots face Hwy 99E, new development should serve as a magnet to draw commuters downtown. Additionally, the current pedestrian view from the MAX station is unappealing, but a food cart pod would add vibrancy to the area. Renewed investment in downtown acts as a catalyst for revitalization. It should be noted, however, that a new downtown location for the Farmers Market needs to be found and secured. Customers and business owners alike frequently stressed the importance of the Farmers Market as a community anchor and a tool for generating business activity.

Business Mix

Downtown Milwaukie's long-term success relies on a healthy mix of retail businesses, services, and community anchors. While downtown Milwaukie has potential to become a flourishing, mixed-use commercial district, it leaves several opportunities on the table.

Housing

Currently, downtown lacks housing. By developing additional housing above retail space, the area would expand its built-in customer base and create opportunities for new businesses to relocate downtown. This is more possible than ever, as the Portland MSA experiences unprecedented growth. The City should pay particular attention to the possibility of developing a mixed use building with housing on upper levels and retail space on lower levels on the opportunity site across from City Hall.

Office Space

Office space takes up hundreds of square feet of crucial retail space. Entire blocks of lower-level spaces are occupied solely by office workers, disrupting the walkability and pedestrian focus of the district. Lower-level office spaces should be encouraged to relocate to upper-level spaces downtown. Office workers, however, are an asset to the district and should not be underestimated. Businesses should focus on capturing spending from local office workers, who are a proven customer base.

Business Recruitment

In order to capture office worker spending, existing businesses should market goods and services directly to area employees and new businesses should be sought to relocate downtown. The success of new businesses will be determined by several factors:

- Aggressive, targeted marketing
- Willingness to fill specialized niches
- Exhibit a focus on needs of the district
- Offering a wide selection of related products or services
- Desire to participate in community events
- Commitment to continuous display window and façade improvements
- Dedication to exemplary customer service and product offerings

Downtown has both community and office anchors, but there are no strong retail anchors. Recruitment of a retail anchor, such as a grocery store, would draw customers downtown, especially commuters that use Hwy 99E. A grocery store would also be likely to capture spending from downtown office workers who, according to the International Council of Shopping Centers, spend 19% of their incomes at grocery stores.

Business recruitment efforts should focus on conveying the needs of the downtown commercial district as well as equipping businesses with the information available regarding customer spending and business mix. The figure below contains potential supportable businesses, based on customer opinions captured by the customer intercept survey and information derived from the retail demand potential analysis.

Figure 12. Targeted Business Recruitment

Category	Types
Apparel	Men's/Women's/Family Clothing Store
Electronics and Appliances	Electronics Store
Grocery	Grocery Store, Health Food Store, and Fresh Food Market
Eateries	Bakery, Coffee/Sandwich Shop, Food Carts, and Restaurant with Live Music/Entertainment

Centralize the Retail Corridor and Cluster Businesses

Creating a strong core along Main St. would strengthen existing businesses and pave the way for new businesses. In addition to creating a centralized core, business clustering is a useful tool that allows for symbiotic relationships between businesses. The block between Jackson and Monroe St. on the west side of Main St. provides an example of what a clustered, mixed-use block could look like, with the following types of businesses located on the lower-level: a restaurant, a niche retail store, a café with outdoor seating, a fitness center, an antique store, and a candy store. On the east side of the street, offices and banking services serve as anchors. The office space, however, would be more suited for upper-level occupancy on the same street and housing should also exist on upper-levels. The creation of a retail oriented blocks is a critical portion of the downtown revitalization strategy and cannot be overstated. Ultimately, the entire district should aim to be a retail-oriented, clustered, mixed use corridor.

Economic Development Efforts Should Guide Policy

With Urban Renewal on the horizon, City Council should consider forming a Downtown Economic Development Committee to ensure downtown stakeholders direct efforts to improve the downtown commercial district. This would create a direct avenue for business owners, property owners, the City, and community members alike to be at the forefront of downtown economic restructuring. In addition, the use of policies that encourage smart development such as inclusionary zoning with low-income housing development requirements, preference for the development of mixed-use hubs with healthy, affordable grocery retailers, and infill incentives would pave the way for an equitable and livable downtown.

Appendix A. Demographic Profile

Total Number of Households, Drive Time, 2000-2020

Household Summary	3 Minute Drive	5 Minute Drive	7 Minute Drive
2000 Households	1,432	9,036	18,571
2010 Households	1,458	9,312	19,309
2015 Households	1,487	9,475	19,749
2020 Households	1,532	9,748	20,401
2015-2020 Annual Rate	0.60%	0.57%	0.52%

Source: ESRI BAO

Total Number of Households, Walk Time, 2000-2020

Household Summary	5 Minute Walk	10 Minute Walk	20 Minute Walk
2000 Households	190	620	2,865
2010 Households	186	616	2,903
2015 Households	194	625	2,905
2020 Households	204	643	2,952
2015-2020 Annual Rate	1.01%	0.57%	0.32%

Source: ESRI BAO

Total Population, Drive Time, 2000-2020

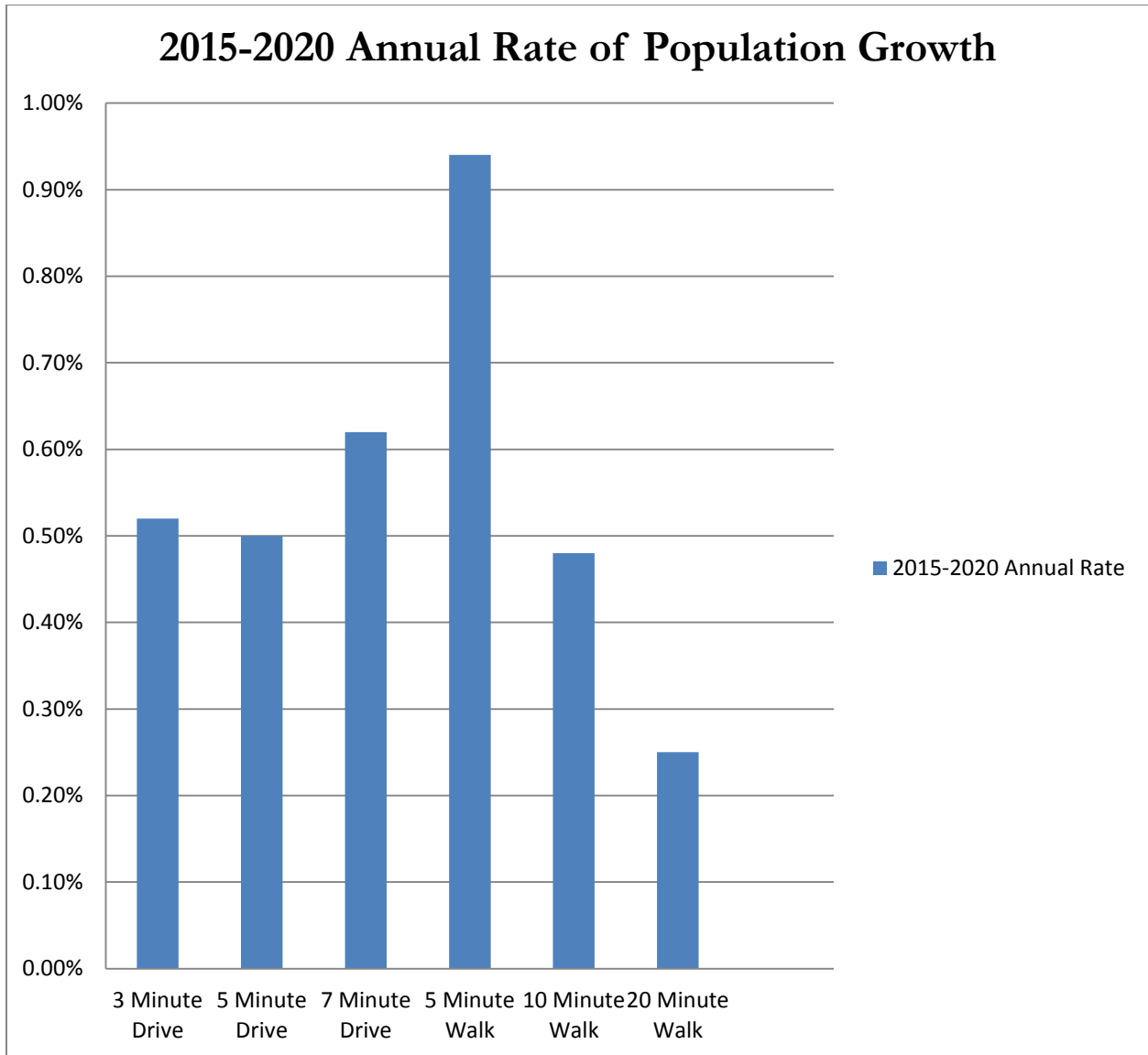
Population Summary	3 Minute Drive	5 Minute Drive	7 Minute Drive
2000 Total Population	3,048	18,985	42,261
2010 Total Population	3,123	19,485	43,759
2015 Total Population	3,172	19,716	44,566
2020 Total Population	3,256	20,217	45,955
2015-2020 Annual Rate	0.52%	0.50%	0.62%

Source: ESRI BAO

Total Population, Walk Time, 2000-2020

Population Summary	5 Minute Walk	10 Minute Walk	20 Minute Walk
2000 Total Population	343	1,195	5,937
2010 Total Population	319	1,212	6,018
2015 Total Population	333	1,228	5,994
2020 Total Population	349	1,258	6,069
2015-2020 Annual Rate	0.94%	0.48%	0.25%

Source: ESRI BAO

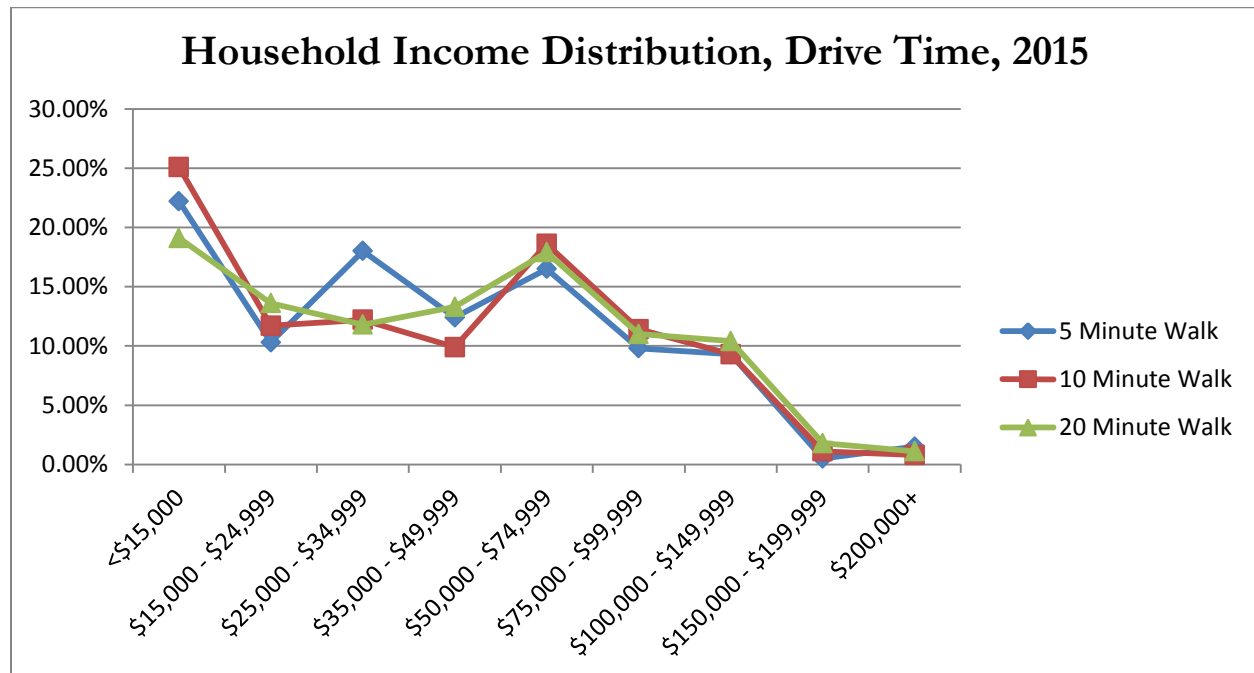


Source: ESRI BAO

Households by Income, Drive Time, 2015

Income	3 Minute Drive	5 Minute Drive	7 Minute Drive
<\$15,000	19.0%	16.5%	13.30%
\$15,000 - \$24,999	13.0%	11.1%	10.10%
\$25,000 - \$34,999	11.4%	11.0%	10.10%
\$35,000 - \$49,999	14.2%	15.2%	14.30%
\$50,000 - \$74,999	16.9%	16.2%	17.20%
\$75,000 - \$99,999	11.2%	12.3%	13.50%
\$100,000 - \$149,999	10.8%	13.3%	15.90%
\$150,000 - \$199,999	2.0%	2.6%	3.30%
\$200,000+	1.5%	1.8%	2.20%
Household Income Base	1,487	9,475	19,749
Median Household Income	\$40,785	\$45,291	\$52,246

Source: ESRI BAO

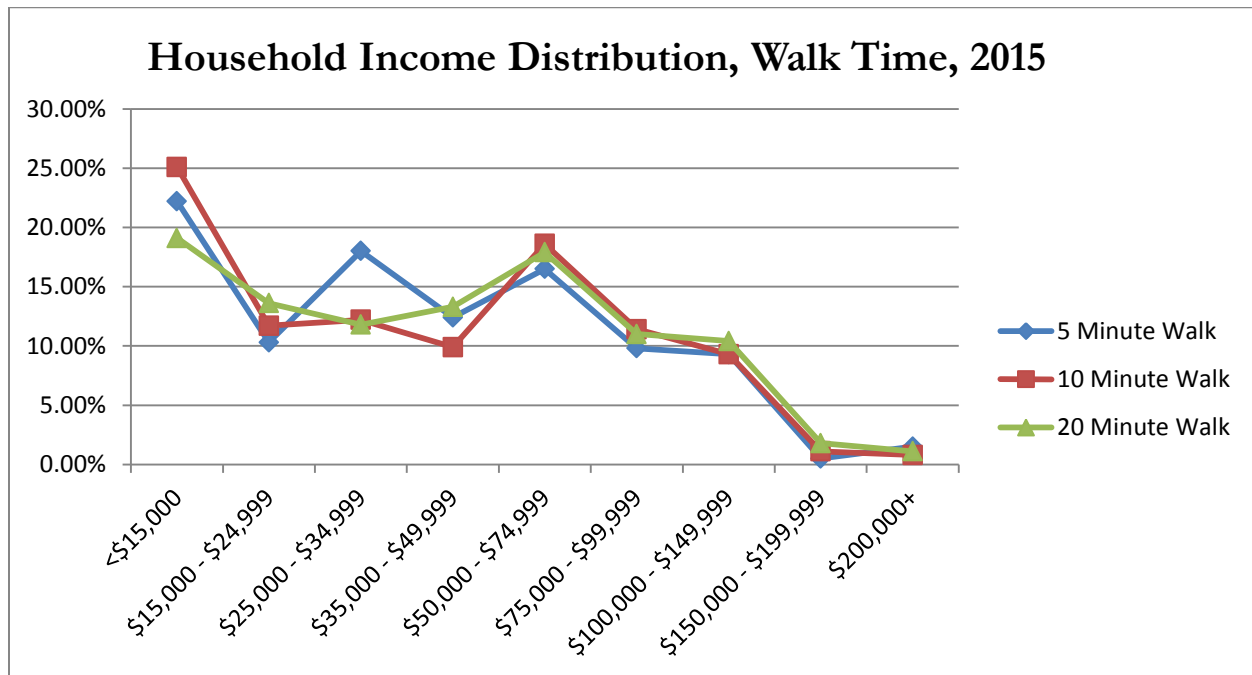


Source: ESRI BAO

Households by Income, Walk Time, 2015

Income	5 Minute Walk	10 Minute Walk	20 Minute Walk
<\$15,000	22.2%	25.1%	19.1%
\$15,000 - \$24,999	10.3%	11.7%	13.6%
\$25,000 - \$34,999	18.0%	12.2%	11.8%
\$35,000 - \$49,999	12.4%	9.9%	13.3%
\$50,000 - \$74,999	16.5%	18.6%	17.9%
\$75,000 - \$99,999	9.8%	11.4%	11.0%
\$100,000 - \$149,999	9.3%	9.3%	10.4%
\$150,000 - \$199,999	0.5%	1.1%	1.8%
\$200,000+	1.5%	0.8%	1.1%
Household Income Base	194	625	2,905
Median Household Income	\$34,804	\$36,210	\$40,146

Source: ESRI BAO

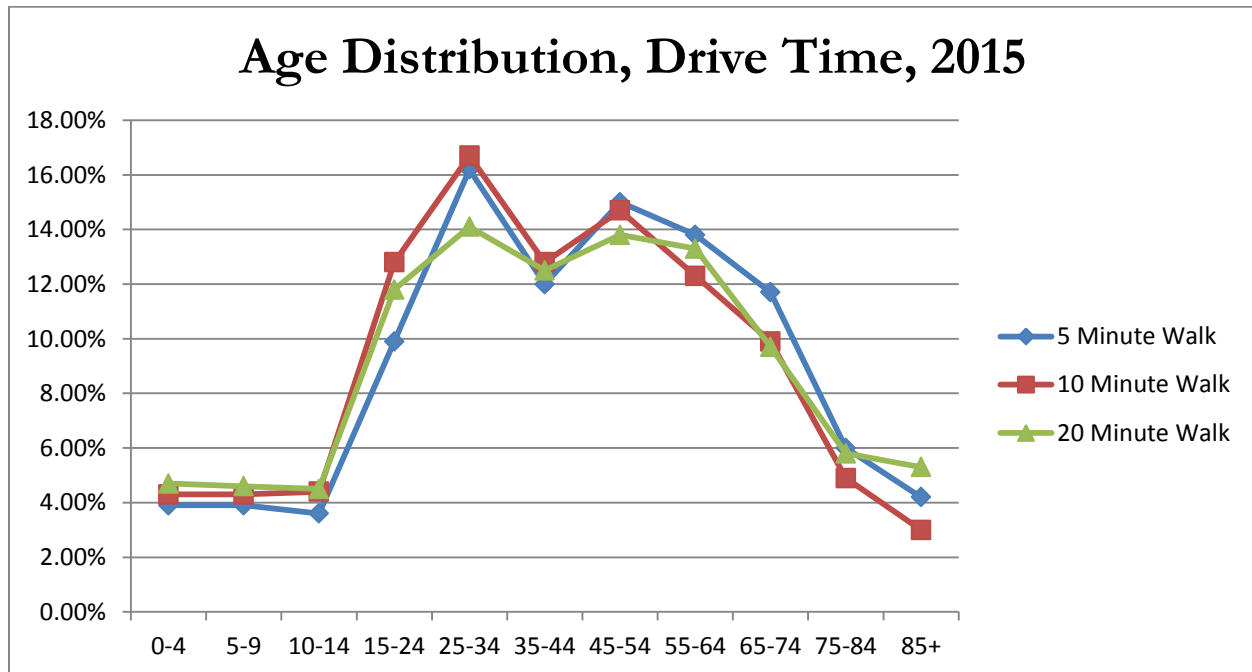


Source: ESRI BAO

Population by Age, Drive Time, 2015

Age	3 Minute Drive	5 Minute Drive	7 Minute Drive
0 - 4	4.6%	5.2%	5.3%
5 - 9	4.3%	4.9%	5.3%
10 - 14	4.4%	5.0%	5.3%
15 - 24	12.0%	11.1%	10.7%
25 - 34	15.3%	14.5%	13.4%
35 - 44	12.3%	13.7%	14.2%
45 - 54	13.5%	13.9%	14.0%
55 - 64	11.9%	13.4%	14.2%
65 - 74	8.7%	9.0%	9.7%
75 - 84	6.0%	4.9%	4.7%
85 +	6.9%	4.4%	3.3%
Total Population	3,172	19,718	44,566
Median Age	42.5	41.7	42.0

Source: ESRI BAO

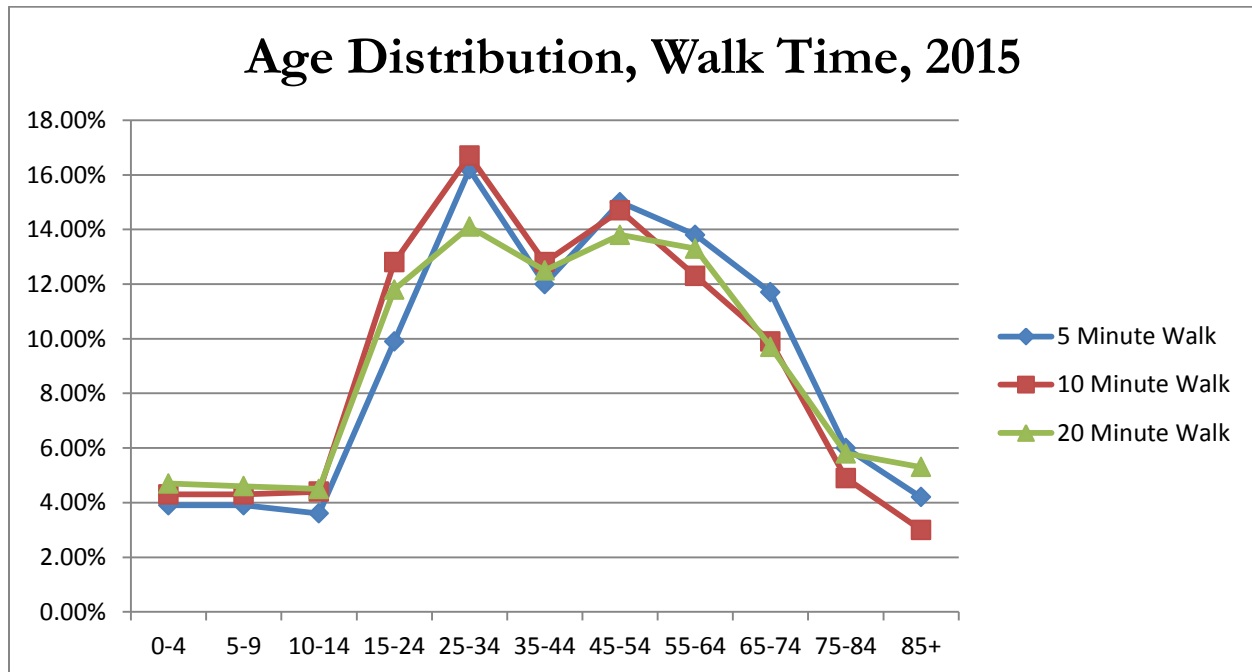


Source: ESRI BAO

Population by Age, Walk Time, 2015

Age	5 Minute Walk	10 Minute Walk	20 Minute Walk
0 - 4	3.9%	4.3%	4.7%
5 - 9	3.9%	4.3%	4.6%
10 - 14	3.6%	4.4%	4.5%
15 - 24	9.9%	12.8%	11.8%
25 - 34	16.2%	16.7%	14.1%
35 - 44	12.0%	12.8%	12.5%
45 - 54	15.0%	14.7%	13.8%
55 - 64	13.8%	12.3%	13.3%
65 - 74	11.7%	9.9%	9.7%
75 - 84	6.0%	4.9%	5.8%
85 +	4.2%	3.0%	5.3%
Total Population	334	1,228	5,993
Median Age	45.4	40.6	43.2

Source: ESRI BAO

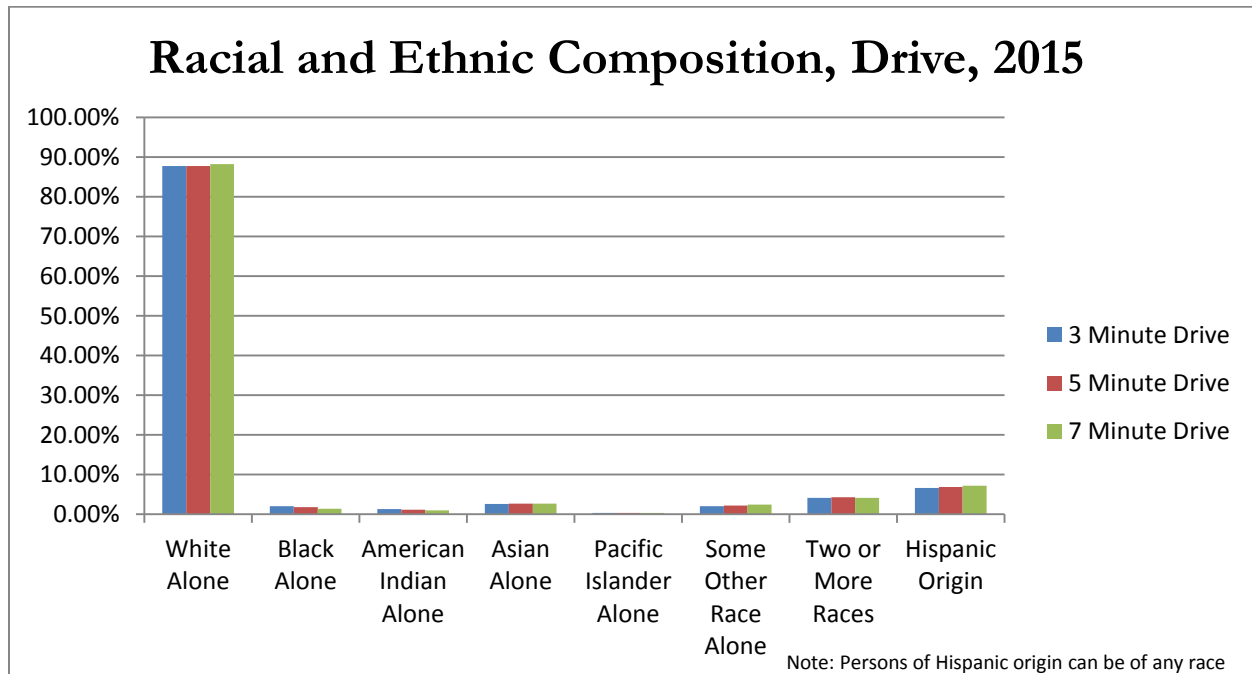


Source: ESRI BAO

Racial and Ethnic Composition, Drive Time, 2015

Race/Ethnicity	3 Minute Drive	5 Minute Drive	7 Minute Drive
White Alone	87.7%	87.7%	88.2%
Black Alone	2.0%	1.8%	1.4%
American Indian Alone	1.3%	1.1%	1.0%
Asian Alone	2.6%	2.7%	2.7%
Pacific Islander Alone	0.3%	0.3%	0.3%
Some Other Race Alone	2.0%	2.2%	2.4%
Two or More Races	4.1%	4.3%	4.1%
Hispanic Origin	6.6%	6.9%	7.2%
Total Population	3,171	19,716	44,568

Source: ESRI BAO

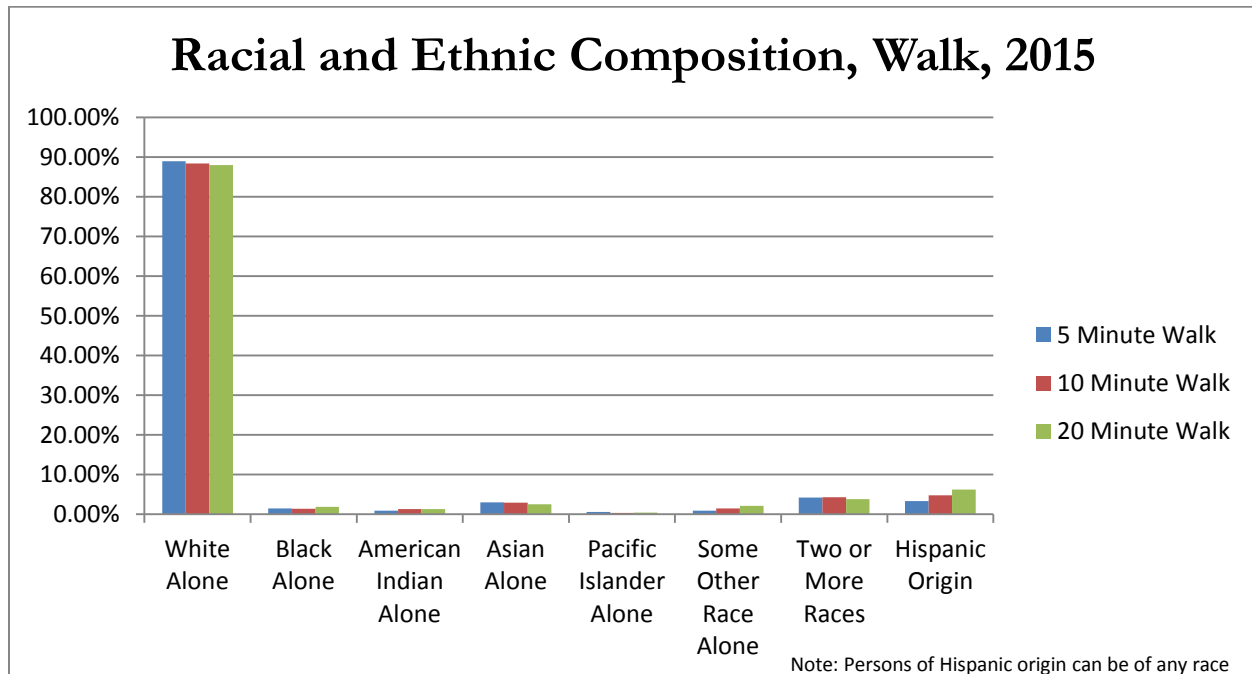


Source: ESRI BAO

Racial and Ethnic Composition, Walk Time, 2015

Race/Ethnicity	5 Minute Walk	10 Minute Walk	20 Minute Walk
White Alone	88.9%	88.4%	88.0%
Black Alone	1.5%	1.4%	1.9%
American Indian Alone	0.9%	1.3%	1.3%
Asian Alone	3.0%	2.9%	2.5%
Pacific Islander Alone	0.6%	0.3%	0.4%
Some Other Race Alone	0.9%	1.5%	2.1%
Two or More Races	4.2%	4.3%	3.8%
Hispanic Origin	3.3%	4.8%	6.2%
Total Population	333	1,228	5,993

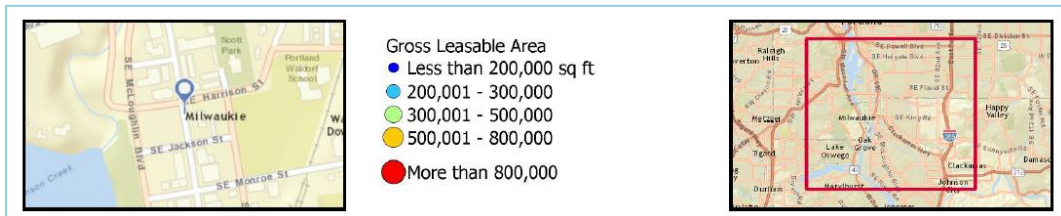
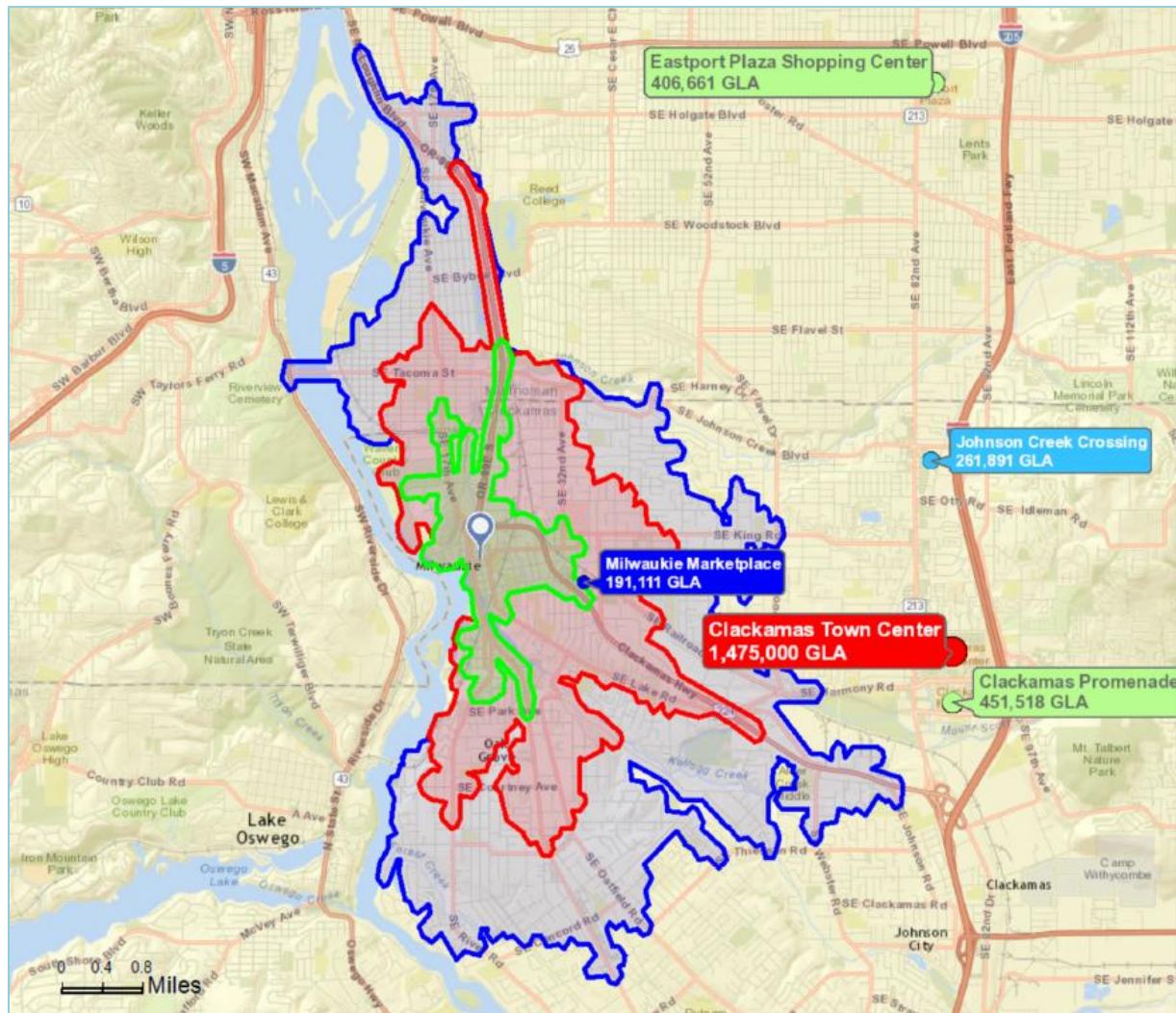
Source: ESRI BAO



Source: ESRI BAO

Appendix B. Shopping Malls

Downtown Milwaukie competes with area shopping centers, so it is necessary to consider potential competition outside of the trade area, even if the shopping centers are not located within the trade area.



Source: ESRI BAO

Appendix C. Retail Demand Potential

Summary of Merchandise and Service Categories

Merchandise/Service Category	Types of Goods/Services
Apparel	Clothing and Clothing Accessories Stores (NAICS 448)
	Clothing Stores, Shoe Stores, and Jewelry, Luggage, and Leather Goods Stores
Home Furnishings	Furniture and Home Furnishings Stores (NAICS 442)
	Furniture Stores and Home Furnishing Stores
Home Improvement	Bldg. Materials, Garden Equip. & Supply Stores (NAICS 444)
	Bldg. Material and Supply Dealers, Lawn and Garden Equipment and Supply Stores
Hobby and Lifestyle	Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)
	Sporting Goods, Hobby, and Musical Instrument Stores and Book, Periodical, and Music Stores
Misc. Store Retailers	Miscellaneous Store Retailers (NAICS 453)
	Florists, Office Supplies, Stationary, Gifts, Used Merchandise, and Other Misc. Store Retailers
Grocery	Grocery Stores (NAICS 4451)
	Food at Home
Health and Personal Care	Health and Personal Care Stores (NAICS 446, 4461)
Eateries	Limited Service Eating Places (NAICS 7222)
	Limited-Service Eating Places

Source: ESRI BAO

Existing Retail Balance and Potential Space

Existing Retail Balance, 5 Minute Drive

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Target Sales (\$/SF)	Potential Space
Apparel	\$14,859,447	\$14,714,481	\$144,966	\$209	693
Home Furnishings	\$7,782,750	\$11,256,311	-\$3,473,561	-	-
Electronics & Appliance	\$18,121,658	\$13,320,222	\$4,801,436	\$199	24,127
Home Improvement	\$12,781,520	\$52,679,454	-\$39,897,934	-	-
Hobby and Lifestyle	\$8,377,067	\$43,007,178	-\$34,630,111	-	-
Misc. Store Retailers	\$16,101,109	\$34,299,180	-\$18,198,071	-	-
Grocery	\$49,657,760	\$39,463,857	\$10,193,903	\$353	28,877
Health & Personal Care	\$14,832,390	\$31,751,933	-\$16,919,543	-	-
Eateries	\$10,846,592	\$7,880,179	\$2,996,413	\$194	15,445
Total Leakage					\$18,136,718
Est. Supportable Sq. Ft.					69,142 sq. ft.

Source: ESRI BAO and Urban Land Institute

Existing Retail Balance, 20 Minute Walk

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Target Sales (\$/SF)	Potential Space
Apparel	\$4,059,651	\$2,449,872	\$1,609,779	\$209	7702
Home Furnishings	\$2,131,785	\$5,568,548	-\$3,436,763	-	-
Electronics & Appliance	\$4,924,192	\$4,472,520	\$451,672	\$199	2270
Home Improvement	\$3,457,060	\$7,386,414	-\$3,929,354	-	-
Hobby and Lifestyle	\$2,298,432	\$37,881,931	-\$35,583,499	-	-
Misc. Store Retailers	\$4,497,526	\$16,063,013	-\$11,565,487	-	-
Grocery	\$13,763,928	\$4,735,363	\$9,028,565	\$353	25,577
Health & Personal Care	\$4,119,660	\$10,785,077	-\$6,665,417	-	-
Eateries	\$2,958,699	\$4,685,127	-\$1,726,428	-	-
Total Leakage					\$11,090,016
Est. Supportable Sq. Ft.					35,549 sq. ft.

Source: ESRI BAO and Urban Land Institute

Appendix D. Customer Intercept Survey

The City of Milwaukie is developing a market study of downtown. We would like your assistance creating an accurate picture of the area. If you have any questions, please contact Ashlee Fox at 503-786-7616 or FoxA@milwaukieoregon.gov.

1. What is the main purpose of your trip today?

<input type="checkbox"/> Apparel and services	<input type="checkbox"/> Transportation (gas, car purchase)
<input type="checkbox"/> Computer	<input type="checkbox"/> Insurance
<input type="checkbox"/> Food for home	<input type="checkbox"/> Household operations (childcare, moving, etc.)
<input type="checkbox"/> Food away from home	<input type="checkbox"/> Household furnishings and equipment
<input type="checkbox"/> Financial	<input type="checkbox"/> Home repair
<input type="checkbox"/> Travel	<input type="checkbox"/> Health
<input type="checkbox"/> Entertainment and recreation	<input type="checkbox"/> Other: _____

2. Do you typically come downtown for the same reason you came downtown today?

Yes No

3. If you live in the area, are the goods and services available downtown meeting your needs?

Yes No Unsure Don't live in the area

4. How often do you shop in downtown?

First time 1-2 times per week 1-2 times per month 1-2 times per year

5. What day(s) do you typically shop in downtown?

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

6. What time(s) do you typically shop in downtown?

9-11am 11-1pm 1-3pm 3-5pm 5-7pm Other: _____

7. What are some of the other places outside of downtown you go to shop, dine, or use services?

82nd Avenue Corridor Clackamas Town Center McLoughlin Corridor Portland
 Sellwood Online Other: _____

8. What are your most frequent downtown Milwaukie destinations?

9. Based on your previous response, what attracts you to these destinations?

<input type="checkbox"/> Selection of products or services	<input type="checkbox"/> Appearance of building or sign
<input type="checkbox"/> Shopping hours	<input type="checkbox"/> Cleanliness
<input type="checkbox"/> Number of parking spaces	<input type="checkbox"/> Safety
<input type="checkbox"/> Quality of businesses	<input type="checkbox"/> Events
<input type="checkbox"/> Places to eat	<input type="checkbox"/> Entertainment/culture
<input type="checkbox"/> Other: _____	<input type="checkbox"/> Walkability/ease of access

10. Do you consider it pleasant and safe to walk downtown?

Yes No Why/why not: _____

11. How would you typically get downtown?

Public transit Bike Walk Drive

12. Approximately how far do you live from downtown?

1-5 blocks ½-1 mile More than 1 mile Other: _____

13. What improvements would you like to see downtown?

More benches More trees/landscaping Improved lighting Bike racks Bike lanes
 Improved sidewalks Improved storefronts Other: _____

14. Please rate your overall perceptions of downtown.

Criteria	Excellent	Good	Average	Fair	Poor
Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cleanliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety/crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Selection of products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Selection of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Places to eat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment/culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appearance of buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walkability/ease of access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. From the following list of businesses, select FIVE that you would like to see located downtown.

<input type="checkbox"/> Clothing store	<input type="checkbox"/> Pet supply store	<input type="checkbox"/> Jeweler	<input type="checkbox"/> Accountant
<input type="checkbox"/> Print shop	<input type="checkbox"/> CD/music store	<input type="checkbox"/> Antique store	<input type="checkbox"/> Bike store
<input type="checkbox"/> Shoe repair	<input type="checkbox"/> Furniture store	<input type="checkbox"/> Health food store	<input type="checkbox"/> Photography store
<input type="checkbox"/> Greeting card shop	<input type="checkbox"/> Hardware store	<input type="checkbox"/> Dry cleaner	<input type="checkbox"/> Hobby store
<input type="checkbox"/> Attorney	<input type="checkbox"/> Recreation facility	<input type="checkbox"/> Drug store	<input type="checkbox"/> Bakery
<input type="checkbox"/> Toy store	<input type="checkbox"/> Shoe store	<input type="checkbox"/> Barber	<input type="checkbox"/> Craft store
<input type="checkbox"/> Coffee/sandwich shop	<input type="checkbox"/> Advertising firm	<input type="checkbox"/> Lodging	<input type="checkbox"/> Discount store
<input type="checkbox"/> Bookstore	<input type="checkbox"/> Sporting goods store	<input type="checkbox"/> Fresh food market	<input type="checkbox"/> Optical goods store
<input type="checkbox"/> Florist	<input type="checkbox"/> Grocery store	<input type="checkbox"/> Musical supply store	<input type="checkbox"/> Office supply store
<input type="checkbox"/> Garden center	<input type="checkbox"/> Leather goods store	<input type="checkbox"/> Medical office	<input type="checkbox"/> Other: _____

Gender	Female <input type="checkbox"/> Male <input type="checkbox"/> Other <input type="checkbox"/>
Age	18-24 <input type="checkbox"/> 25-34 <input type="checkbox"/> 35-44 <input type="checkbox"/> 45-54 <input type="checkbox"/> 55-64 <input type="checkbox"/> 65+ <input type="checkbox"/>
Annual Household Income	< \$25,000 <input type="checkbox"/> \$25,000-34,999 <input type="checkbox"/> \$35,000-44,999 <input type="checkbox"/> \$45,000-74,999 <input type="checkbox"/> \$75,000-99,999 <input type="checkbox"/> > \$100,000 <input type="checkbox"/>
Zip Code	97222 <input type="checkbox"/> 97267 <input type="checkbox"/> Other: _____

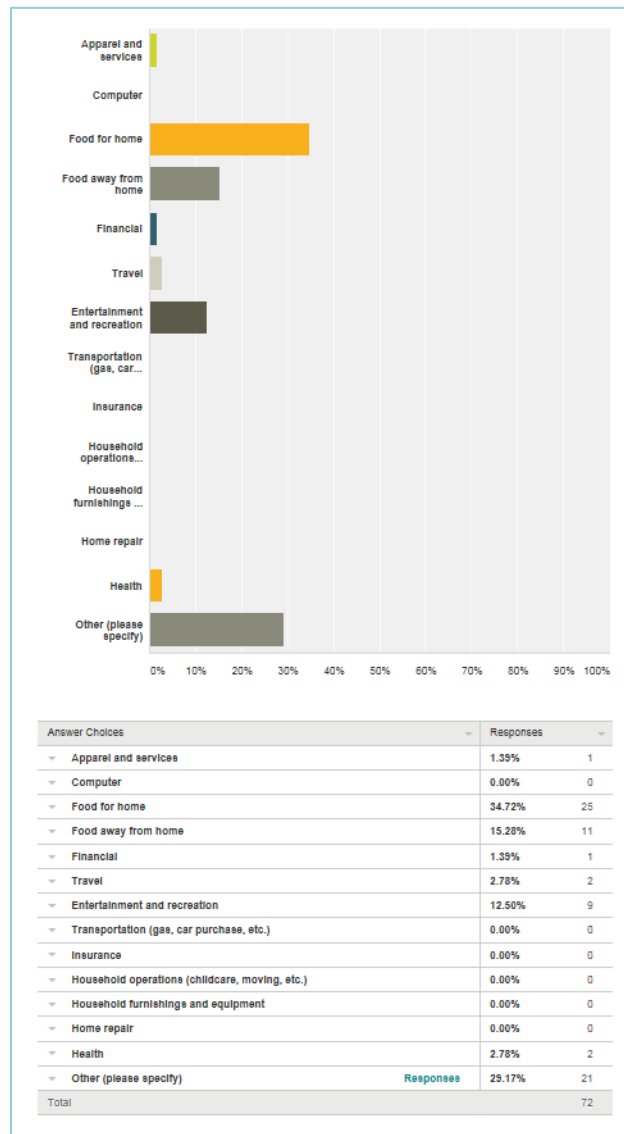
Customer Intercept Survey Results

Methodology

During the months of June and July 2016, surveys were conducted at the Milwaukie MAX station and the Farmers Market on June 26 and July 10. Business cards with links to the online version of the survey were also given to visitors at the First Friday on July 8 and the Ledding Library. In total, 72 downtown Milwaukie visitors completed surveys.

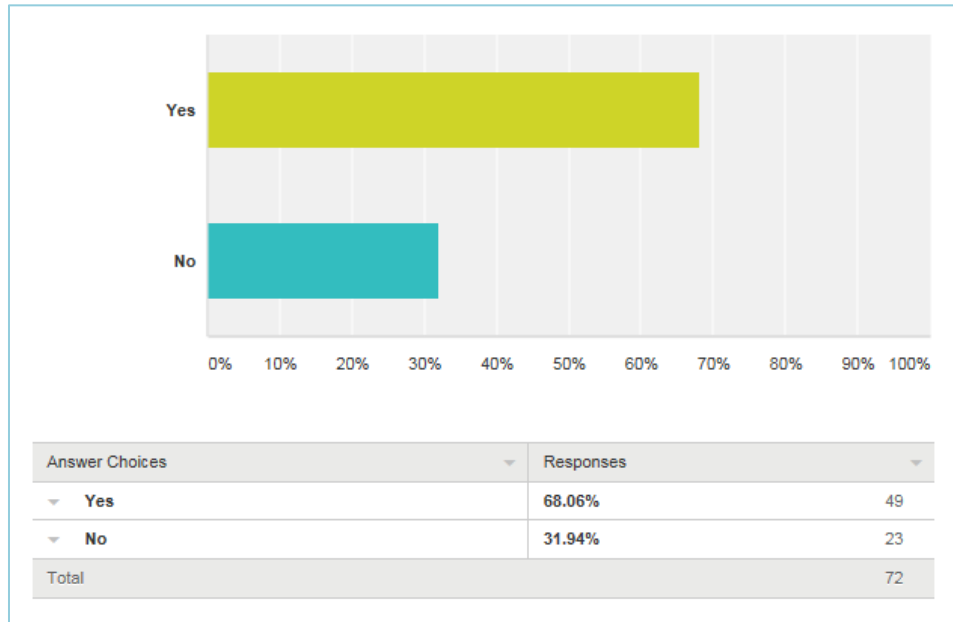
Customer Intercept Survey Results

1. What was the main purpose of your last trip to downtown Milwaukie?



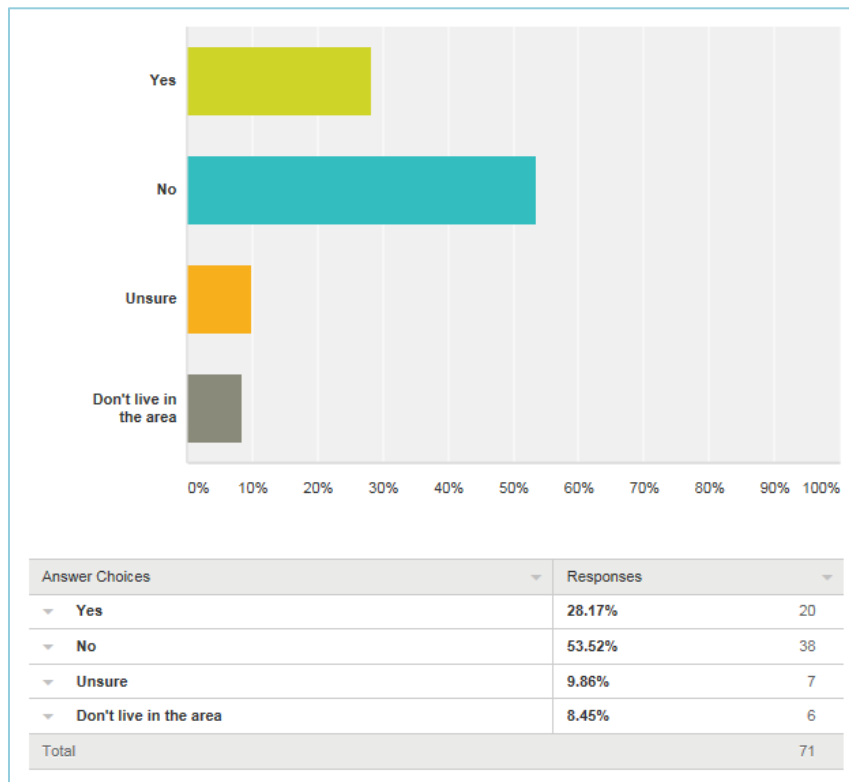
Source: SurveyMonkey

2. Do you typically go downtown for the same reason you came downtown today?



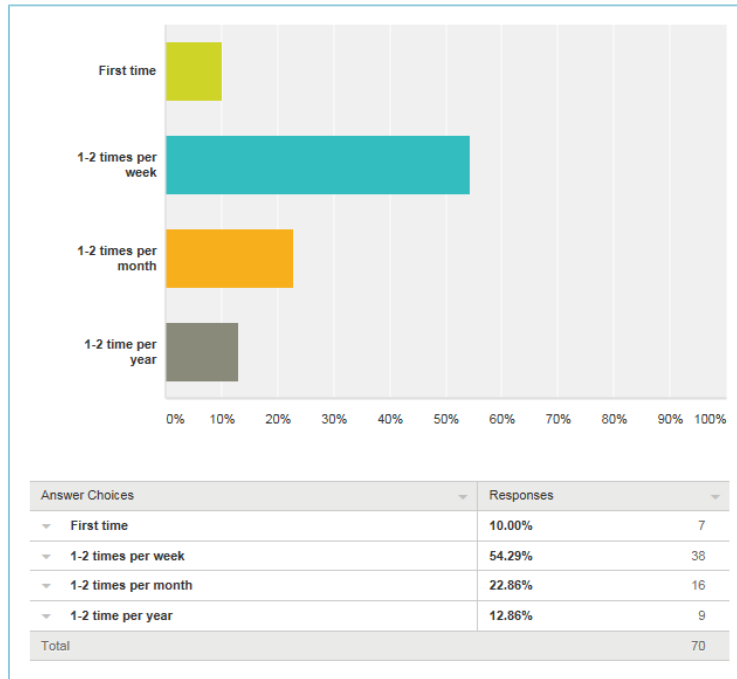
Source: SurveyMonkey

3. If you live in the area, are the goods and services available downtown meeting your needs?



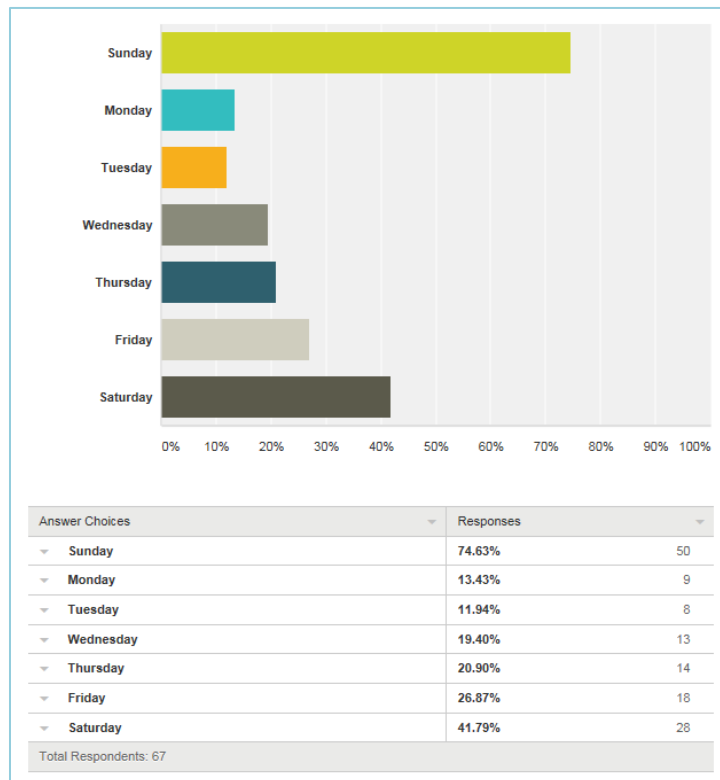
Source: SurveyMonkey

4. How often do you shop in downtown Milwaukie?



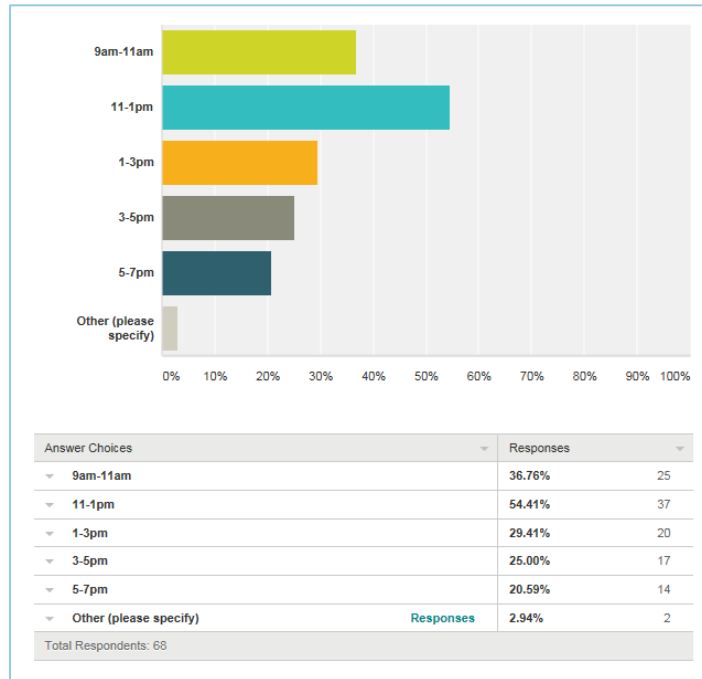
Source: SurveyMonkey

5. What day(s) do you typically shop downtown?



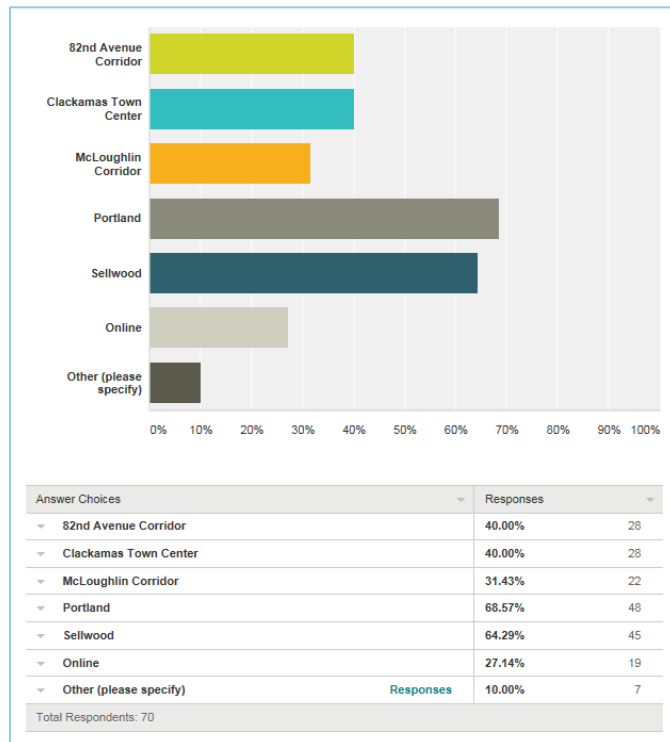
Source: SurveyMonkey

6. What time(s) do you typically shop downtown?



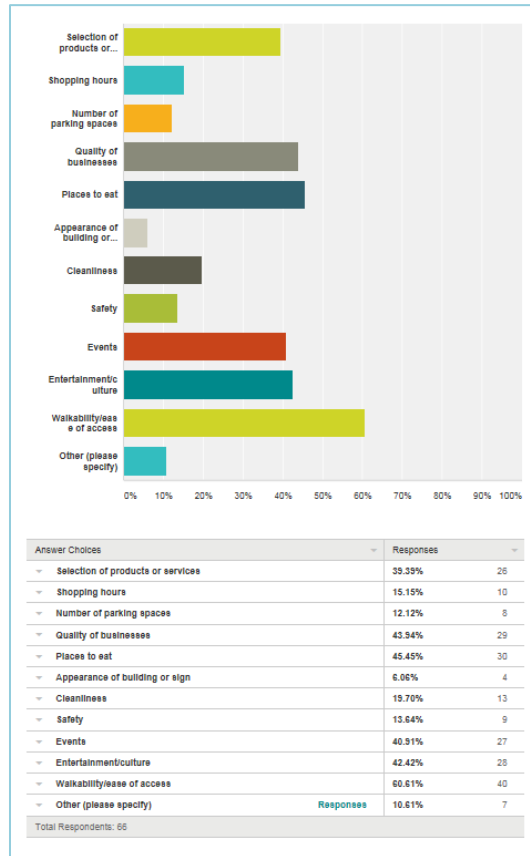
Source: SurveyMonkey

7. What are some of the other places outside of downtown that you go to shop, dine, or use services?



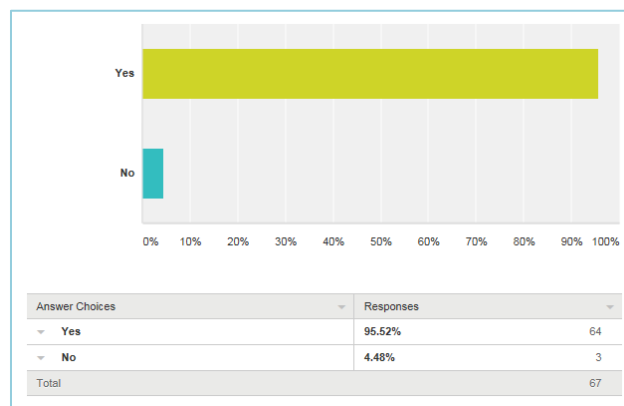
Source: SurveyMonkey

8. List your most frequent downtown destinations.
 - 68% of respondents listed the Farmer's Market as one of their most frequent downtown destinations
 - 32% of respondents listed the Ledding Library as one of their most frequent downtown destinations
9. Based on your previous response, what attracts you to these destinations?



Source: SurveyMonkey

10. Do you consider it pleasant and safe to walk downtown?

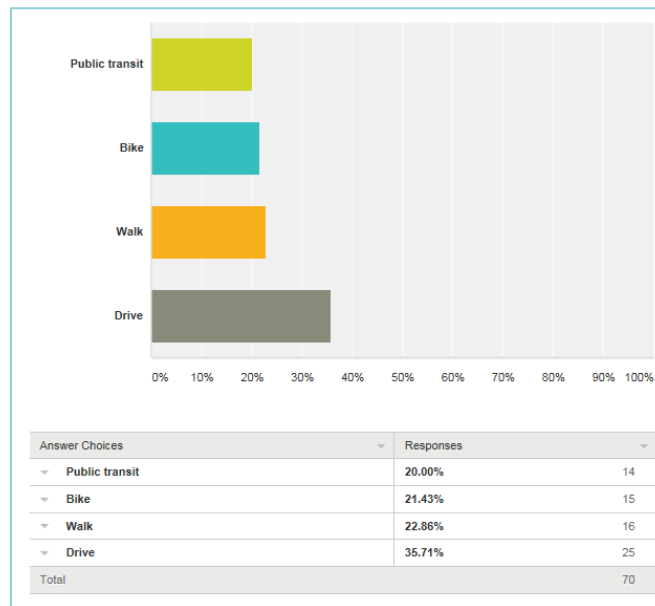


Source: SurveyMonkey

11. Why or why not?

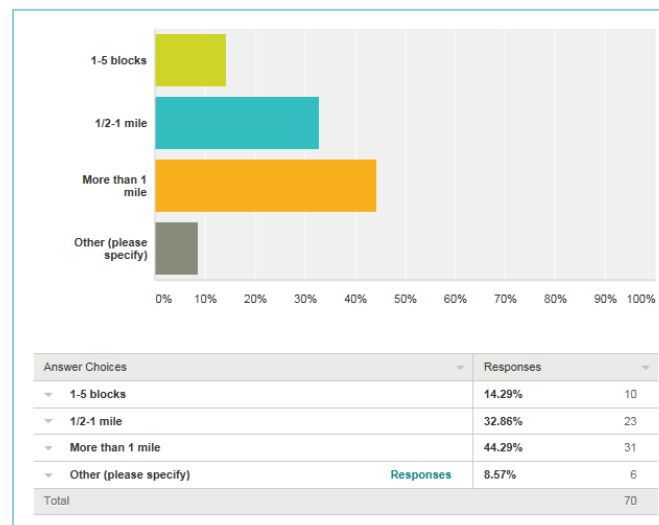
- “Love the sidewalks, trees/flowers, low traffic. However, I do feel unsafe occasionally when I have to cross Hwy 224”
- “Streets are clean and lighted”
- “People are generally friendly, it's quiet but not deserted, and if you needed help it would arrive quickly”
- “Too much fast auto traffic”
- “It's quaint and quiet”

12. How do you typically get downtown?



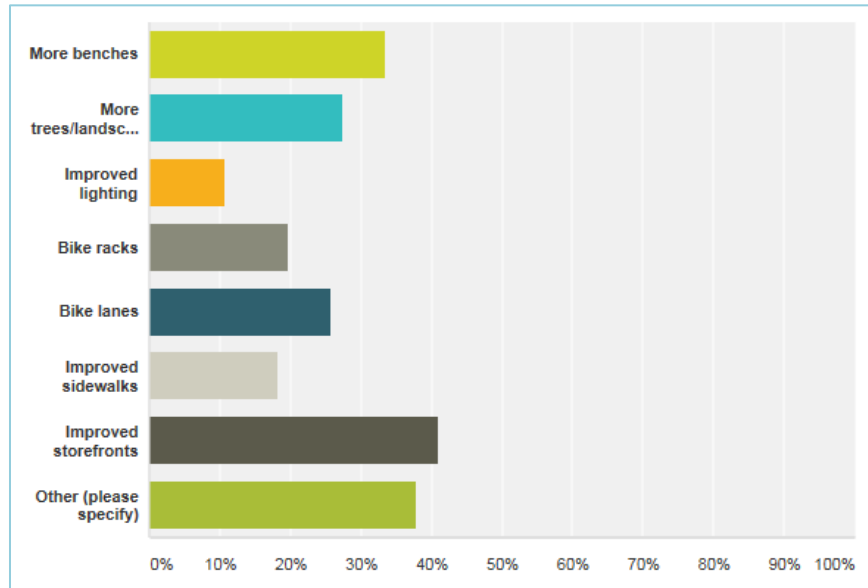
Source: SurveyMonkey

13. Approximately how far do you live from downtown?



Source: SurveyMonkey

14. What improvements would you like to see downtown?



Source: SurveyMonkey

15. Please rate your overall perceptions of downtown.

	Excellent	Good	Average	Fair	Poor	Total	Weighted Average
Parking	17.46% 11	42.86% 27	30.16% 19	7.94% 5	1.59% 1	63	2.33
Cleanliness	26.98% 17	61.90% 39	4.76% 3	4.76% 3	1.59% 1	63	1.92
Traffic	11.11% 7	58.73% 37	23.81% 15	6.35% 4	0.00% 0	63	2.25
Shopping hours	6.90% 4	34.48% 20	34.48% 20	20.69% 12	3.45% 2	58	2.79
Promotions	8.70% 4	28.26% 13	41.30% 19	17.39% 8	4.35% 2	46	2.80
Safety/crime	30.65% 19	54.84% 34	11.29% 7	1.61% 1	1.61% 1	62	1.89
Quality of businesses	11.48% 7	42.62% 26	24.59% 15	18.03% 11	3.28% 2	61	2.59
Cost of goods	6.67% 4	48.33% 29	40.00% 24	5.00% 3	0.00% 0	60	2.43
Selection of products	5.00% 3	20.00% 12	33.33% 20	31.67% 19	10.00% 6	60	3.22
Selection of services	5.08% 3	23.73% 14	25.42% 15	32.20% 19	13.56% 8	59	3.25
Customer service	17.86% 10	62.50% 35	17.86% 10	1.79% 1	0.00% 0	56	2.04
Places to eat	10.77% 7	29.23% 19	29.23% 19	21.54% 14	9.23% 6	65	2.89
Entertainment/culture	9.52% 6	25.40% 16	26.98% 17	26.98% 17	11.11% 7	63	3.05
Appearance of buildings	19.67% 12	39.34% 24	24.59% 15	13.11% 8	3.28% 2	61	2.41
Number of events	14.29% 9	28.57% 18	31.75% 20	23.81% 15	1.59% 1	63	2.70
Walkability/ease of access	38.46% 25	41.54% 27	12.31% 8	6.15% 4	1.54% 1	65	1.91

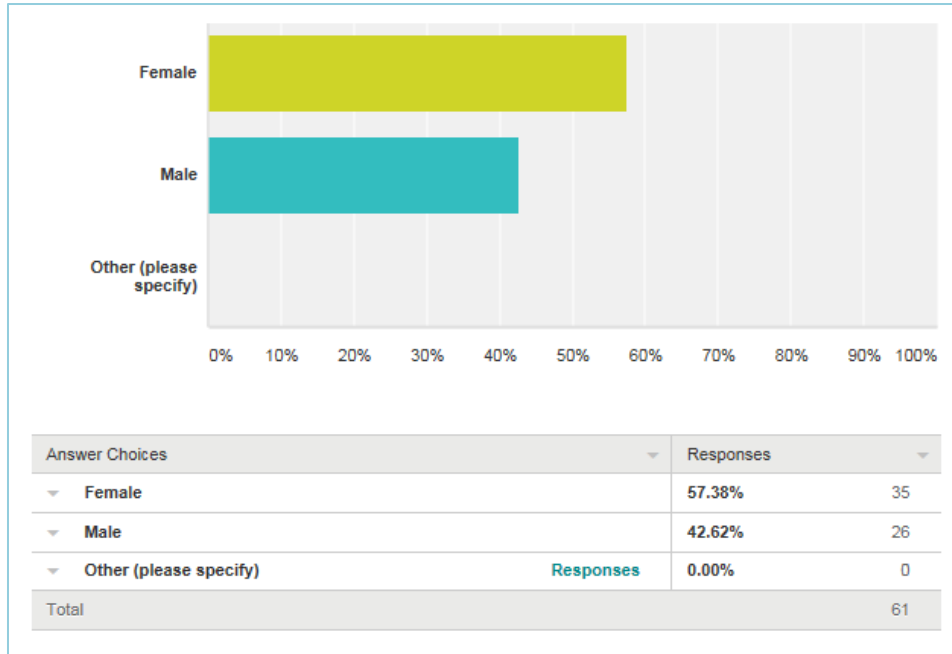
Source: SurveyMonkey

16. Select FIVE businesses that you would like to see located downtown.

Answer Choices	Responses	
▼ Clothing store	25.00%	16
▼ Print shop	4.69%	3
▼ Shoe repair	4.69%	3
▼ Greeting card shop	9.38%	6
▼ Attorney	0.00%	0
▼ Toy store	9.38%	6
▼ Coffee/sandwich shop	39.06%	25
▼ Bookstore	43.75%	28
▼ Florist	4.69%	3
▼ Garden center	23.44%	15
▼ Pet supply store	4.69%	3
▼ CD/music store	4.69%	3
▼ Furniture store	4.69%	3
▼ Hardware store	20.31%	13
▼ Recreation facility	9.38%	6
▼ Shoe store	3.13%	2
▼ Advertising firm	0.00%	0
▼ Sporting goods store	6.25%	4
▼ Grocery store	62.50%	40
▼ Leather goods store	0.00%	0
▼ Jeweler	1.56%	1
▼ Antique store	4.69%	3
▼ Health food store	28.13%	18
▼ Dry cleaner	1.56%	1
▼ Drug store	9.38%	6
▼ Barber	3.13%	2
▼ Lodging	6.25%	4
▼ Fresh food market	67.19%	43
▼ Musical supply store	4.69%	3
▼ Medical office	3.13%	2
▼ Accountant	0.00%	0
▼ Bike store	14.06%	9
▼ Photography store	3.13%	2
▼ Hobby store	7.81%	5
▼ Bakery	42.19%	27
▼ Craft store	7.81%	5
▼ Discount store	4.69%	3
▼ Optical goods store	1.56%	1
▼ Office supply store	4.69%	3
▼ Other (please specify)	Response 20.31%	13
Total Respondents: 64		

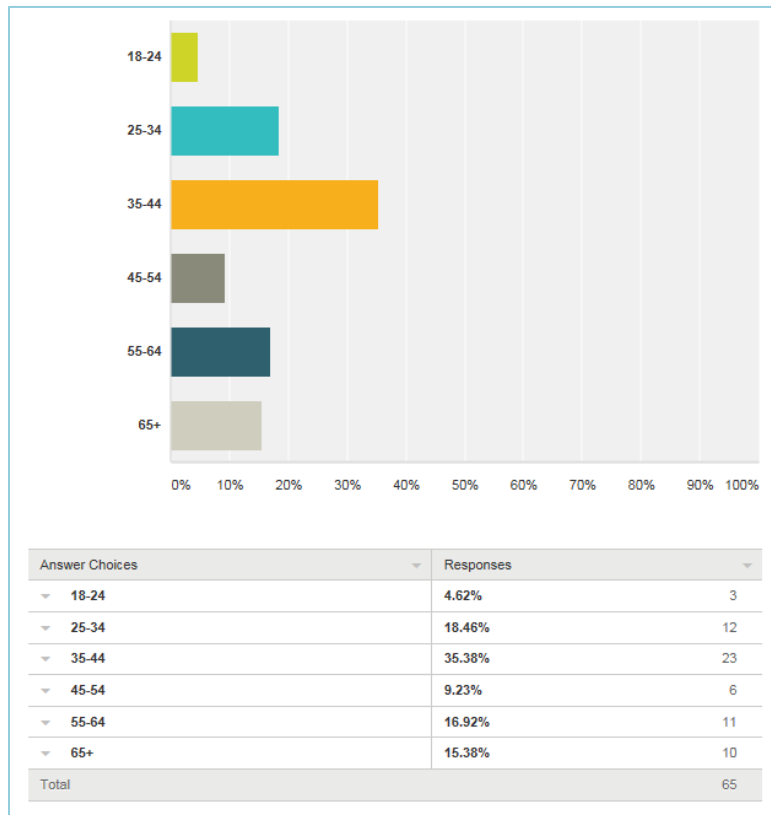
Source: SurveyMonkey

17. What is your gender?



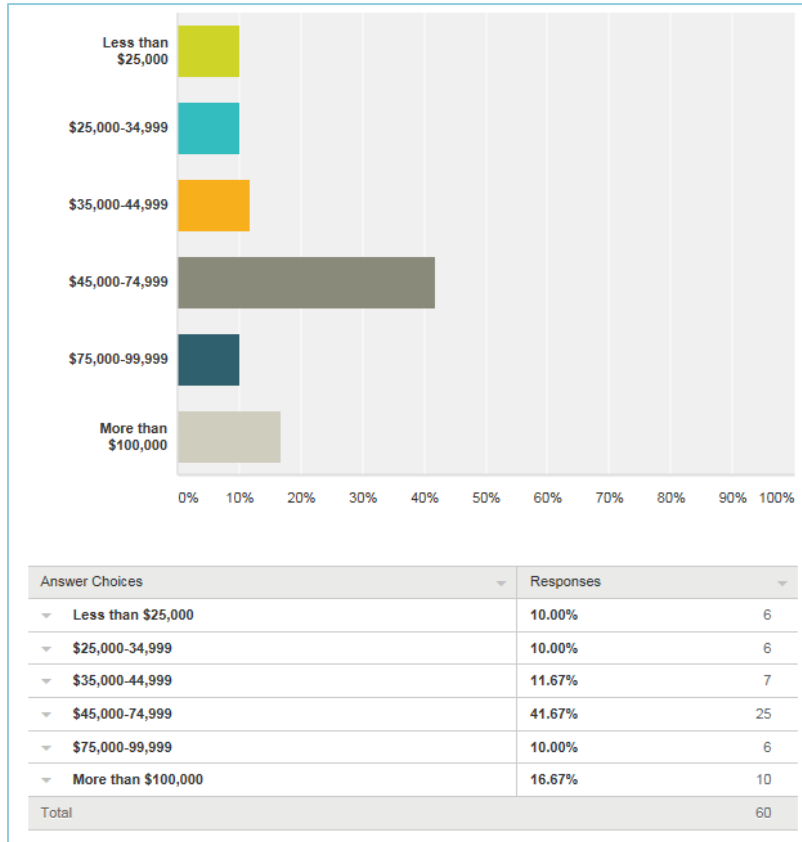
Source: SurveyMonkey

18. What is your age?



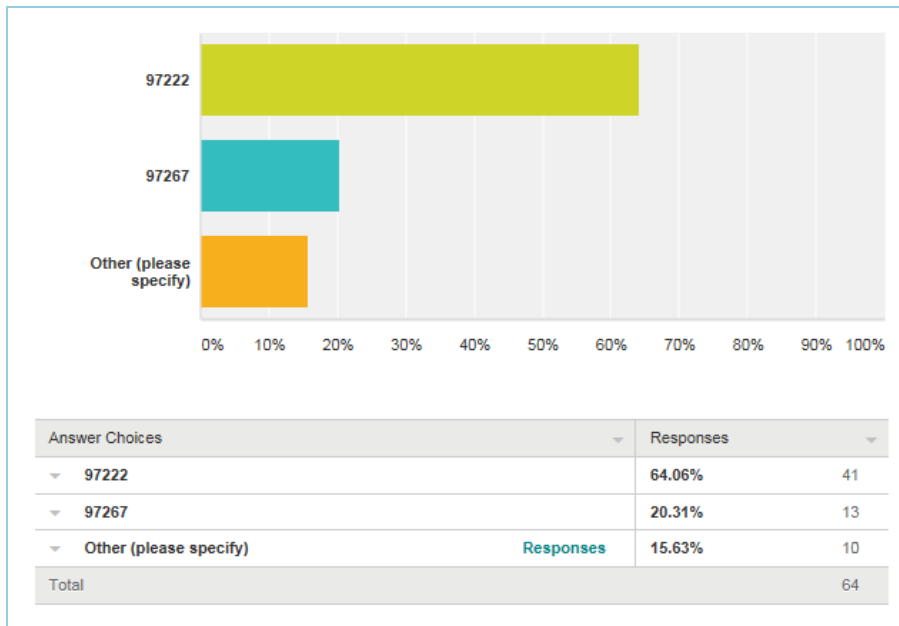
Source: SurveyMonkey

19. What is your annual household income?



Source: SurveyMonkey

20. What is the zip code of your house?



Source: SurveyMonkey

Appendix E. Business Owner Survey

Letter to Business Owners

June 15, 2016

Dear Business Owner:

The City of Milwaukie Community Development Department is conducting a market study for downtown Milwaukie. We are conducting this study to assess the market along Main Street and the surrounding area. As part of the study, business and property owners are receiving surveys during the month of June.

The Community Development Department recognizes the importance of including the perspectives of business owners regarding the challenges they face, the successes they encounter, and the future of downtown. In order to ensure we include your voice, we ask that you take 5 to 7 minutes to complete the survey. You may instead take the survey online at www.surveymonkey.com/r/milwaukiebusinesses. Individual responses will be confidential and no personal or business names or information will be used in the final report. The completed survey will be picked up from your place of business *no later than June 24*. If you are not available for us to pick up the survey, please fax it to 503-774-8236 or mail it to the address below:

City of Milwaukie
Attn: Alma Flores
6101 SE Johnson Creek Blvd.
Milwaukie, Oregon 97206

As a token of our appreciation, you will receive a free pair of socks from Sock It To Me upon completion of the survey. Many thanks go to Sock It To Me for their generous donation and support.

In the meantime, if you have any questions, please contact Ashlee Fox by phone at 503-786-7616 or by email at FoxA@milwaukieoregon.gov. Thank you for taking the time to participate in this important research process.

Sincerely,

Alma Flores
Community Development Director



SOCK
it to me

Business Owner Survey

The City of Milwaukie is developing a market study of your business district. We would like your assistance creating an accurate picture of the business climate. Please take a few minutes to complete the survey below or online at <https://www.surveymonkey.com/r/milwaukiebusinesses>. If you have any questions, contact Ashlee Fox at 503-786-7616 or FoxA@milwaukieoregon.gov.

Date _____

Name of Business(es) _____
Name of Business Owner _____
Business Address _____
Email _____
Phone number _____
Type of Business (restaurant, dry cleaner, etc.) _____
How long have you been in business? _____

1. Do you rent or own the business facility?
2. If you rent, what is your monthly rent? _____
3. What is the size of your business (in square feet)? _____
4. Hours of Operation (Please complete as appropriate.)

Sunday	
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	

5. What is/are your busiest sales time(s) of the day?
 9-11am 11am-1pm 1-3pm 3-5pm 5-7pm Other _____
6. What are your **THREE** busiest sales months of the year?
 January February March April May June July August September
 October November December
7. When do you typically plan major sales/specials for your business? (Check all that apply.)
 January February March April May June July August September
 October November December
8. What is/are your busiest sales day(s) of the week?
 Sunday Monday Tuesday Wednesday Thursday Friday Saturday
9. Number of full-time employees _____ Number of part-time employees _____
10. How far from downtown do the majority of your employees live?
 1-5 miles 5-10 miles 10-15 miles 15+ miles

11. How many jobs did this business create in 2015, including owners that work at the business?

1-2 3-5 6-10 11-25 25+

12. Where do your employees park?

On-site On the street Don't need parking Other

13. How do your employees get to work?

Drive Carpool Use public transportation Bike Walk Other

14. How satisfied are you with your current location?

Very satisfied Satisfied Neutral Unsatisfied Very unsatisfied

15. Do you have plans to expand, reduce, or relocate this business in the foreseeable future?

Expand Reduce

Relocate: within Milwaukie outside of Milwaukie Other _____

None of the above

16. If you have plans to expand, reduce, or relocate, have you encountered any barriers?

Yes: Employment Financing Regulatory Structural Zoning Other _____

No plans to expand, reduce, or relocate

17. Over the past five years your business has:

Improved Remained the same Declined

Please explain.

18. Where do most of your customers visit from? (Select all that apply.)

Live nearby Work nearby Neighboring cities More than 10 miles away Don't know

19. Of the characteristics listed, which FIVE do you feel are most important for the health and vitality of downtown?

<input type="checkbox"/> Selection of products	<input type="checkbox"/> Appearance of signs
<input type="checkbox"/> Selection of services	<input type="checkbox"/> Cleanliness
<input type="checkbox"/> Shopping hours	<input type="checkbox"/> Safety
<input type="checkbox"/> Quality of businesses	<input type="checkbox"/> Number of events and promotions
<input type="checkbox"/> Number of parking spaces	<input type="checkbox"/> Traffic circulation
<input type="checkbox"/> Customer service	<input type="checkbox"/> Loading zones
<input type="checkbox"/> Places to eat	<input type="checkbox"/> Entertainment/culture
<input type="checkbox"/> Price of goods	<input type="checkbox"/> Appearance of buildings
<input type="checkbox"/> Price of rent	<input type="checkbox"/> Walkability
<input type="checkbox"/> Location	<input type="checkbox"/> Access to public transportation

20. What changes have you seen since your business first arrived downtown?

21. Please select any of the following business challenges you or the downtown area are/is currently dealing with.

<input type="checkbox"/> No problems	<input type="checkbox"/> Product costs/availability	<input type="checkbox"/> Vandalism
<input type="checkbox"/> Financing	<input type="checkbox"/> In-city competition	<input type="checkbox"/> Limited foot traffic
<input type="checkbox"/> Shoplifting, theft	<input type="checkbox"/> Out-of-city competition	<input type="checkbox"/> Visual appeal of downtown
<input type="checkbox"/> Personnel costs	<input type="checkbox"/> Taxes, business fees	<input type="checkbox"/> Outdated technology
<input type="checkbox"/> Shipping/transport costs	<input type="checkbox"/> Difficulty recruiting staff	<input type="checkbox"/> Regulations or codes
<input type="checkbox"/> Utility costs/availability	<input type="checkbox"/> Health insurance costs	<input type="checkbox"/> State of the economy
<input type="checkbox"/> Other: _____		

22. Please select any of the following strengths of doing business in downtown Milwaukie.

<input type="checkbox"/> Foot traffic	<input type="checkbox"/> Low operating costs
<input type="checkbox"/> Availability of employees	<input type="checkbox"/> Accessible parking
<input type="checkbox"/> Location	<input type="checkbox"/> Cost of rent
<input type="checkbox"/> Located near an anchor store	<input type="checkbox"/> Low taxes
<input type="checkbox"/> Density	<input type="checkbox"/> Transportation access (transit)
<input type="checkbox"/> Other: _____	

23. Please rate downtown on the following criteria.

Criteria	Excellent	Good	Average	Fair	Poor
Selection of products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Selection of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenient store hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of parking spaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Places to eat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment/culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prices of goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appearance of buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appearance of signs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cleanliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety/crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic Circulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. Which downtown events generate the most business activity?

Summer concerts Art Walk Farmers Market First Friday Other _____

25. How has the recent addition of the Orange line changed your business?

More people downtown Sales increased More accessible Fewer people downtown
 Fewer people visit my property No changes

26. If your business is a restaurant or serves food, do you currently have outdoor café seating?

Yes No Business does not serve food

27. Are you interested in the parklet program?

Yes No Unsure

28. Did you know there is a Business Association downtown?

Yes No

29. What kinds of services would you be interested in from the Business Association?

Group advertising Legal assistance Window display assistance Tax advice
 Banking assistance Financial planning Business planning Networking opportunities
 Other

30. Select the FIVE businesses that would complement your business and should be nearby.

<input type="checkbox"/> Clothing store	<input type="checkbox"/> Pet supply store	<input type="checkbox"/> Jeweler	<input type="checkbox"/> Accountant
<input type="checkbox"/> Print shop	<input type="checkbox"/> CD/music store	<input type="checkbox"/> Antique store	<input type="checkbox"/> Bike store
<input type="checkbox"/> Shoe repair	<input type="checkbox"/> Furniture store	<input type="checkbox"/> Health food store	<input type="checkbox"/> Photography store
<input type="checkbox"/> Greeting card shop	<input type="checkbox"/> Hardware store	<input type="checkbox"/> Dry cleaner	<input type="checkbox"/> Hobby store
<input type="checkbox"/> Attorney	<input type="checkbox"/> Recreation facility	<input type="checkbox"/> Drug store	<input type="checkbox"/> Bakery
<input type="checkbox"/> Toy store	<input type="checkbox"/> Shoe store	<input type="checkbox"/> Barber	<input type="checkbox"/> Craft store
<input type="checkbox"/> Coffee/sandwich shop	<input type="checkbox"/> Advertising firm	<input type="checkbox"/> Lodging	<input type="checkbox"/> Discount store
<input type="checkbox"/> Bookstore	<input type="checkbox"/> Sporting goods store	<input type="checkbox"/> Fresh food market	<input type="checkbox"/> Optical goods store
<input type="checkbox"/> Florist	<input type="checkbox"/> Grocery store	<input type="checkbox"/> Musical supply store	<input type="checkbox"/> Office supply store
<input type="checkbox"/> Garden center	<input type="checkbox"/> Leather goods store	<input type="checkbox"/> Medical office	<input type="checkbox"/> Other: _____

Thank you for your time! Ashlee Fox will return to your business by June 24 to pick up your completed survey. Completed surveys may also be emailed to FoxA@milwaukieoregon.gov, faxed to 503-774-8236, or mailed to:

City of Milwaukie
 Attn: Alma Flores
 6101 SE Johnson Creek Blvd.
 Milwaukie, Oregon 97206

If you would like to receive the results of this study as soon as they are available, please provide us with your email: _____.

Business Owner Survey Results

Methodology

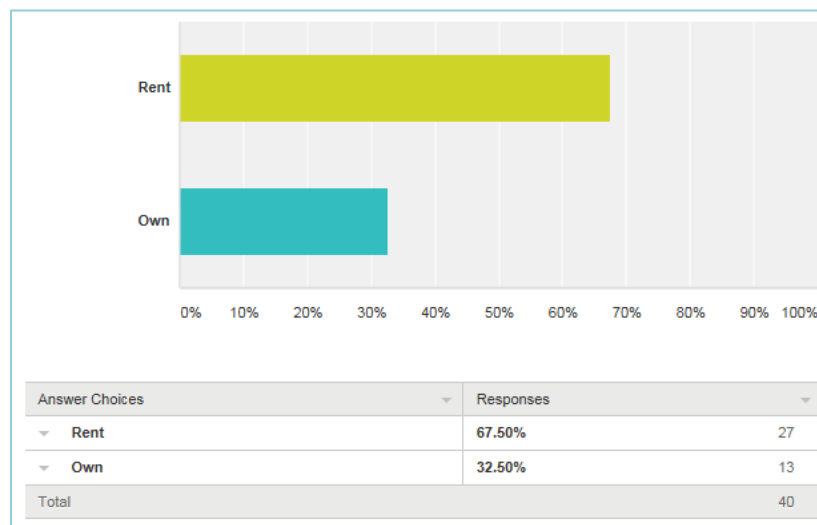
During the month of June, 137 downtown business owners received hand-delivered paper copies of surveys along with a business card containing the link to the online survey. In total, 40 business owners (29%) returned their survey.

Business Owner Survey Results

Participating Businesses

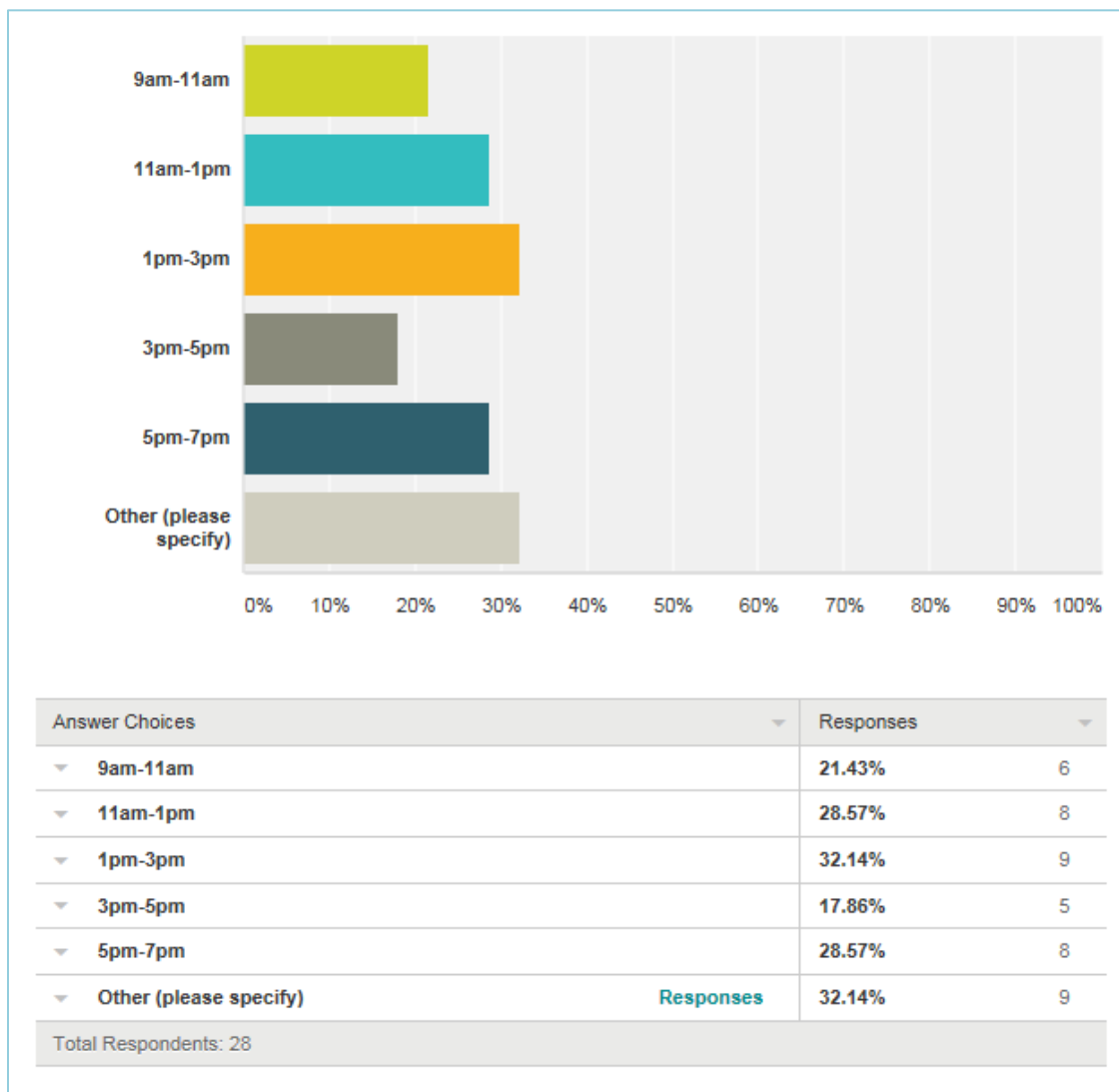
Haven's Acupuncture, Roseland Piano, Peitro's Pizza, Reliable Credit, Cha! Cha! Cha! Mexican Taqueria, Oregon Designing Women LTD, Mundorff and Kovac, American Legion Post 180, Chopsticks Express, Market on Main, Oregon Trail Recovery, Town Grocery and Deli, Dusty Tiger Antiques and Toys, Heart Path Counseling, LLC, Bank of the West, Evergreen Thrift Store, Portland Premier Realty, Portland Mobile Notary, LLC, A Touch of Zen Massage and Bodywork, Painted Lady Coffee House, Edward Jones, Anvil Barbershop, Doug Naef Farmers Insurance Agency, Beer Store Milwaukie, Beacon Oral Surgery, Shield's Painting, Ledding Library of Milwaukie, Rice Thai Cookery, Veterinary Cancer & Surgery Specialists, Myles O'Donnell & Co., Sully's Café, Acupuncture for Wellness, Jim Fogel Farmers Insurance, Steffen Legal Services, LLC, Youth M.O.V.E. Oregon, Libbie's, Willamette View Foundation, Wine:30, Vitality Massage Clinic, and Kellogg Bowl

1. Do you rent or own the property?



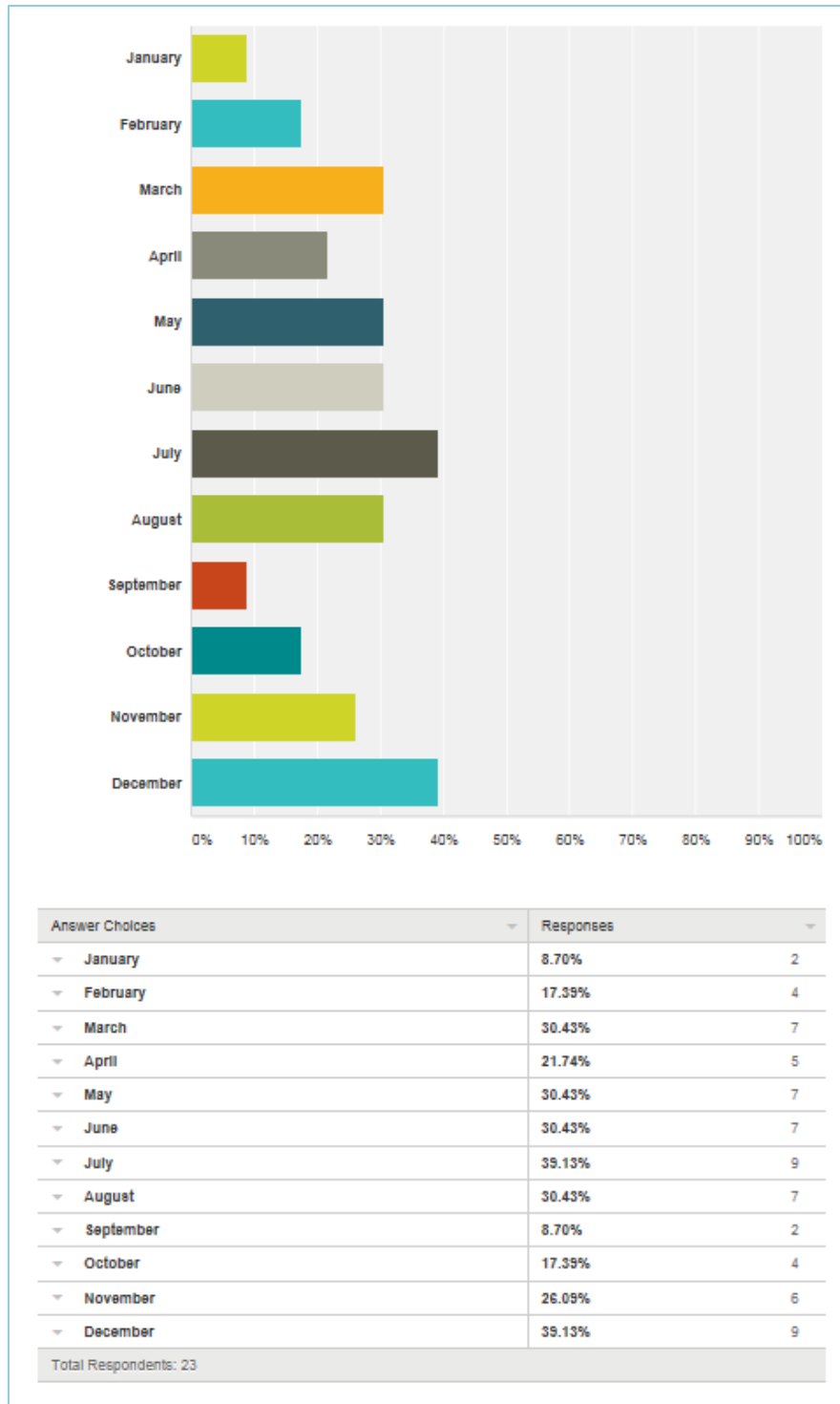
Source: SurveyMonkey

2. If you rent the space, what is your monthly rent?
 - Rent prices range from \$375 to \$4700 per month.
 - The average monthly rent price is \$1548 and the median monthly rent price is \$1250.
3. What is the size of your space (in square feet)?
 - Business spaces range from 150 square feet to 21,000 square feet.
 - The average size of a business space is 3,680 square feet and the median size is 2,100 square feet.
4. What are your hours of operation?
 - There are no consistent hours of operation, but there are fewer businesses open on Saturday and Sunday than weekdays.
5. What are your busiest sales times?



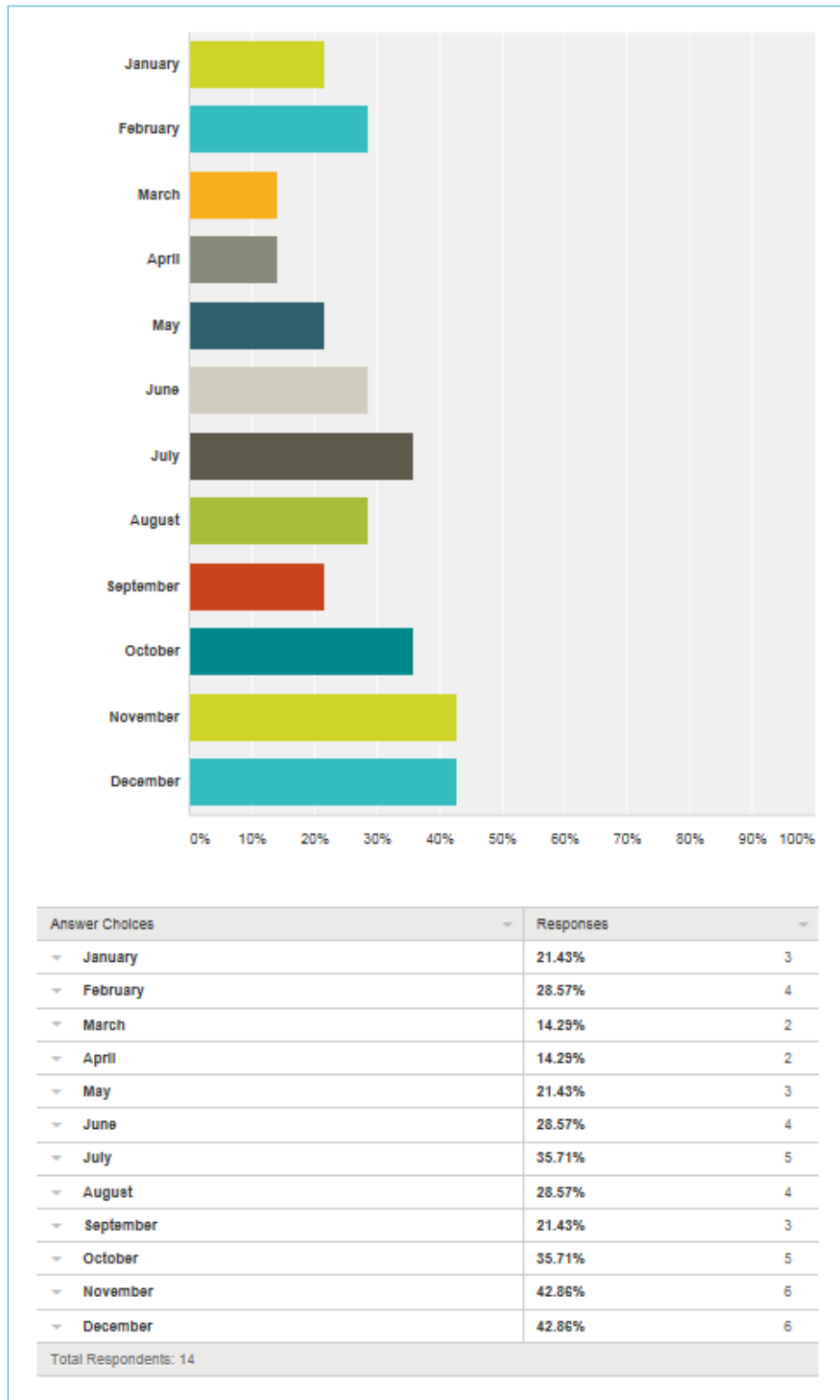
Source: SurveyMonkey

6. What are your THREE busiest sales months of the year?



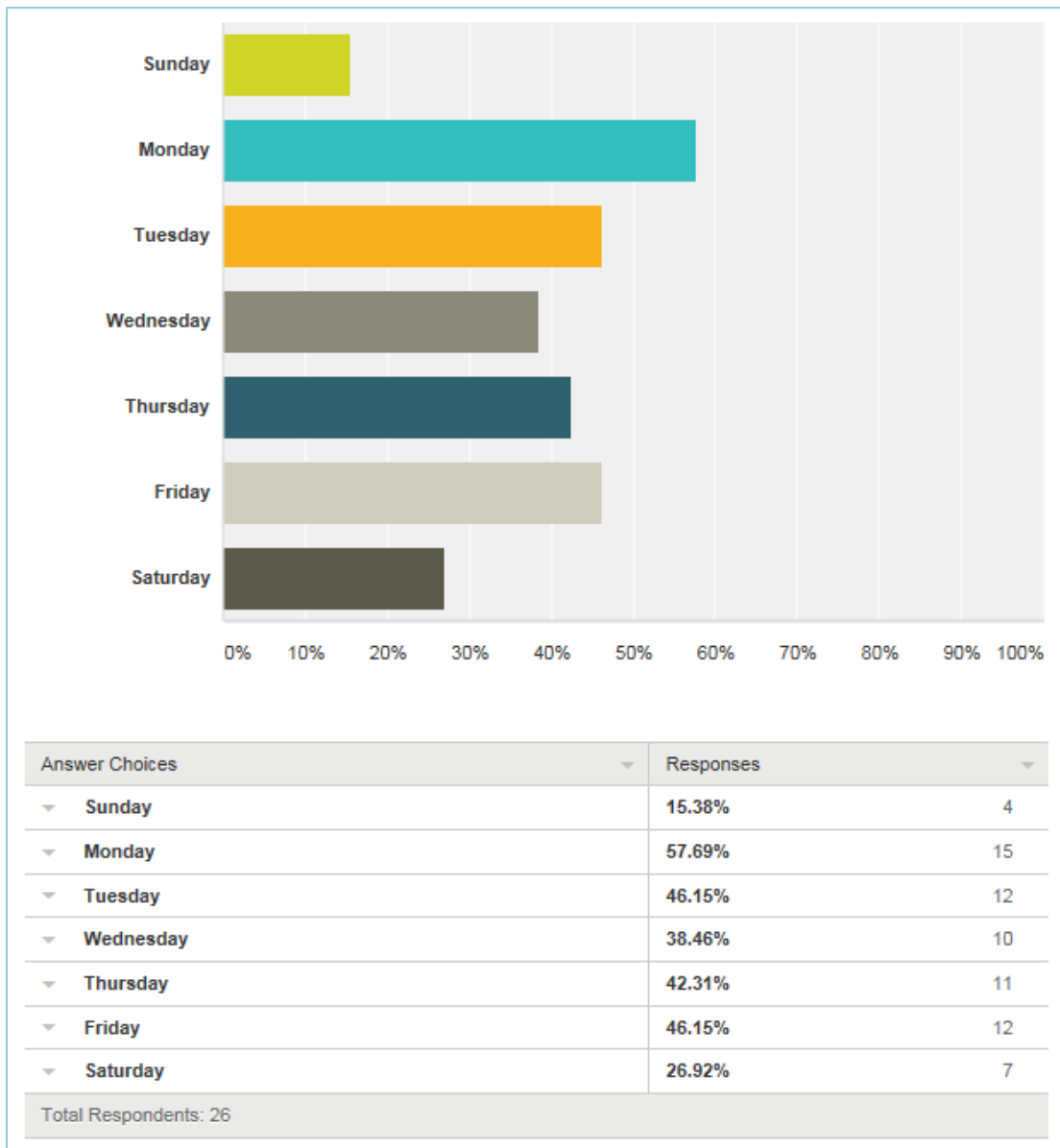
Source: SurveyMonkey

7. When do you typically plan major sales/specials for your business?



Source: SurveyMonkey

8. What is/are your busiest sales day(s) of the week?



Source: SurveyMonkey

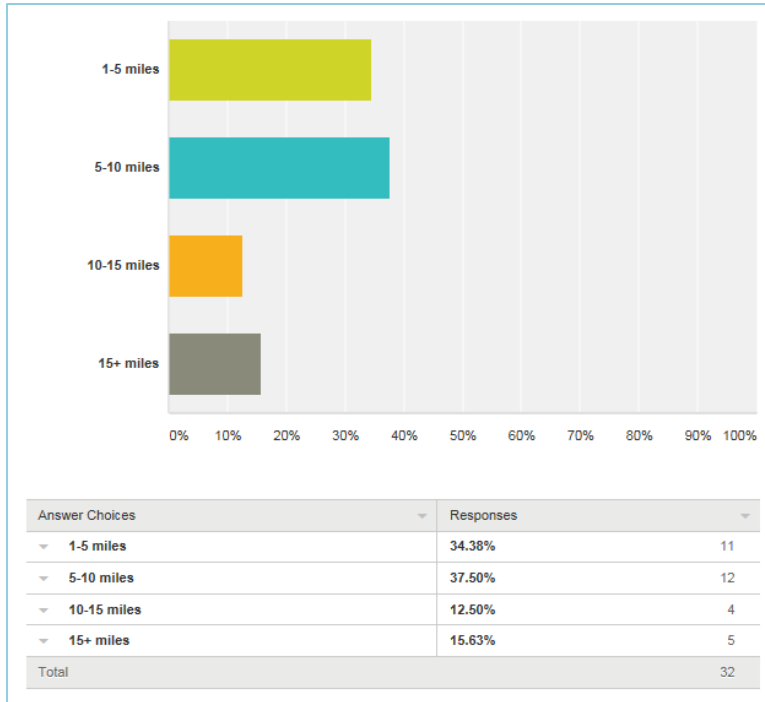
9. How many full-time employees do you have?

- The number of full-time employees per business ranges from 0 to 20.
- There is an average of 4.9 full-time employees and a median of 3 full-time employees.

10. How many part-time employees do you have?

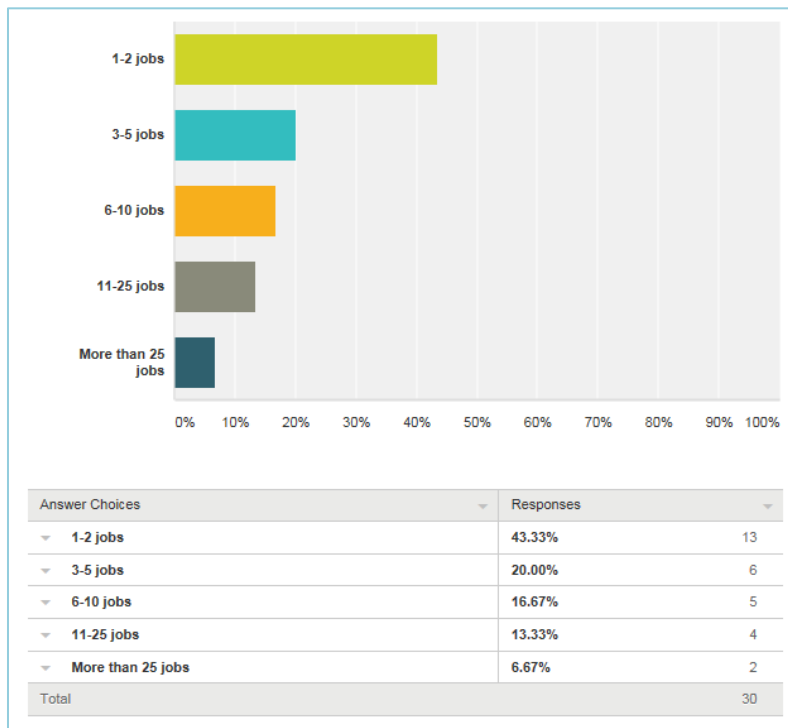
- The number of part-time employees per business ranges from 0 to 17.
- There is an average of 4.2 part-time employees and a median of 1 part-time employee.

11. How far from downtown do the majority of your employees live?



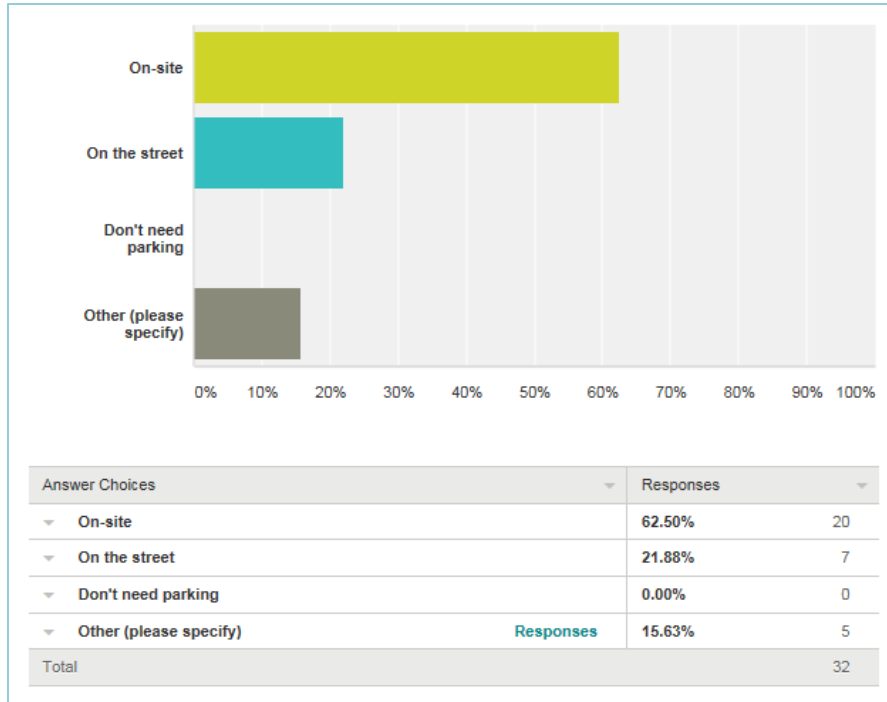
Source: SurveyMonkey

12. How many jobs did your business create in 2015, including owners that work at the business?



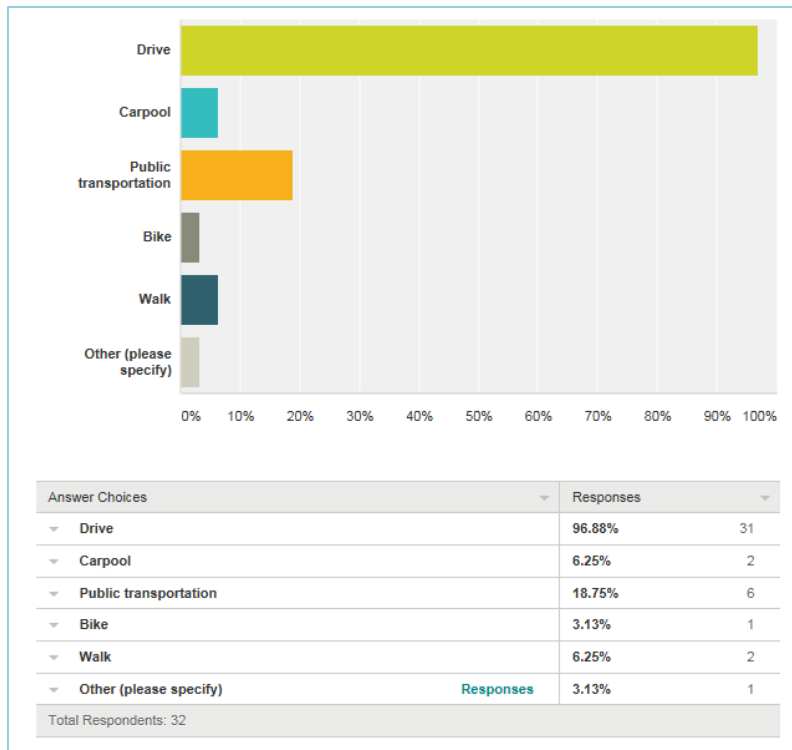
Source: SurveyMonkey

13. Where do your employees park?



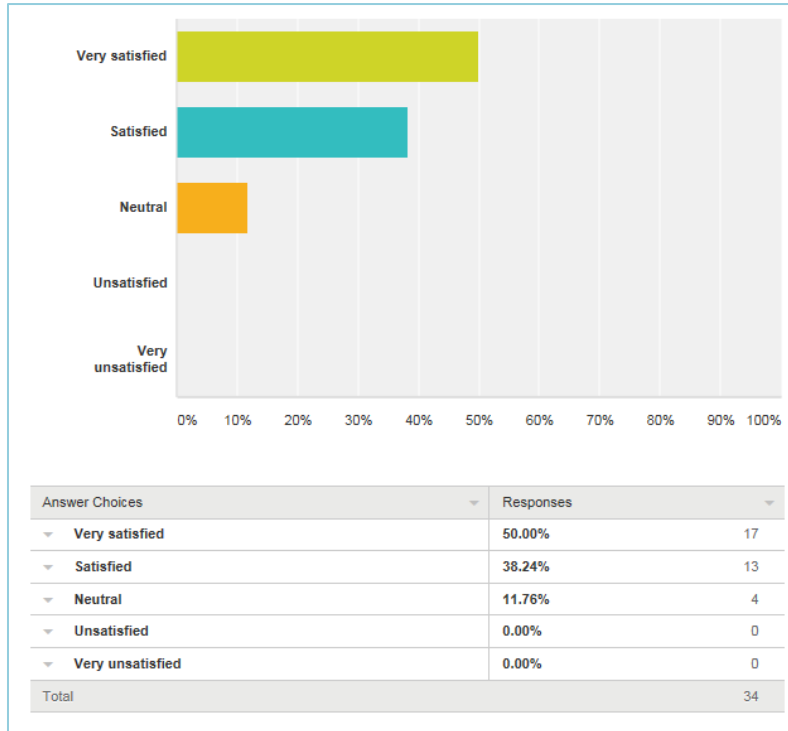
Source: SurveyMonkey

14. How do your employees get to work?



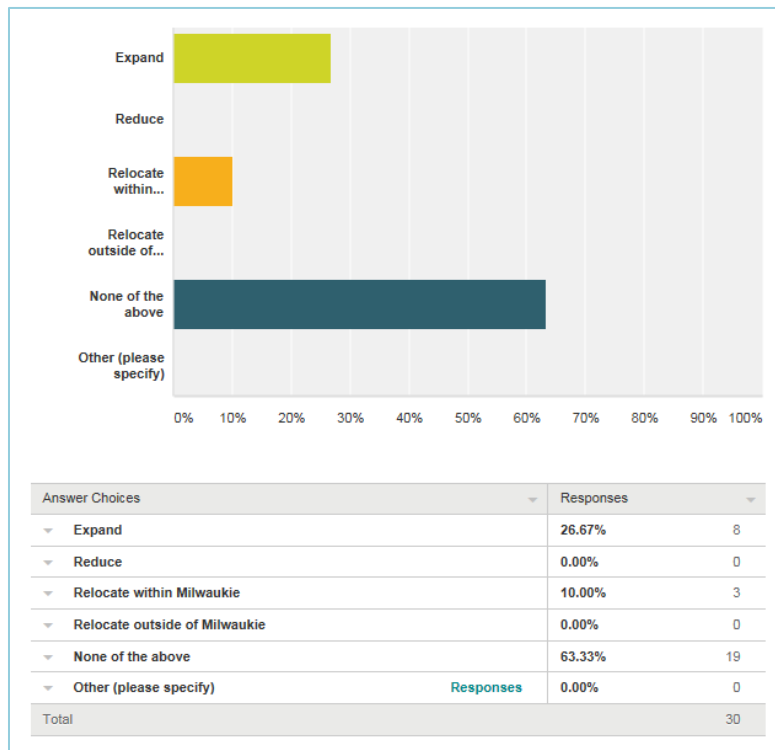
Source: SurveyMonkey

15. How satisfied are you with your current location?



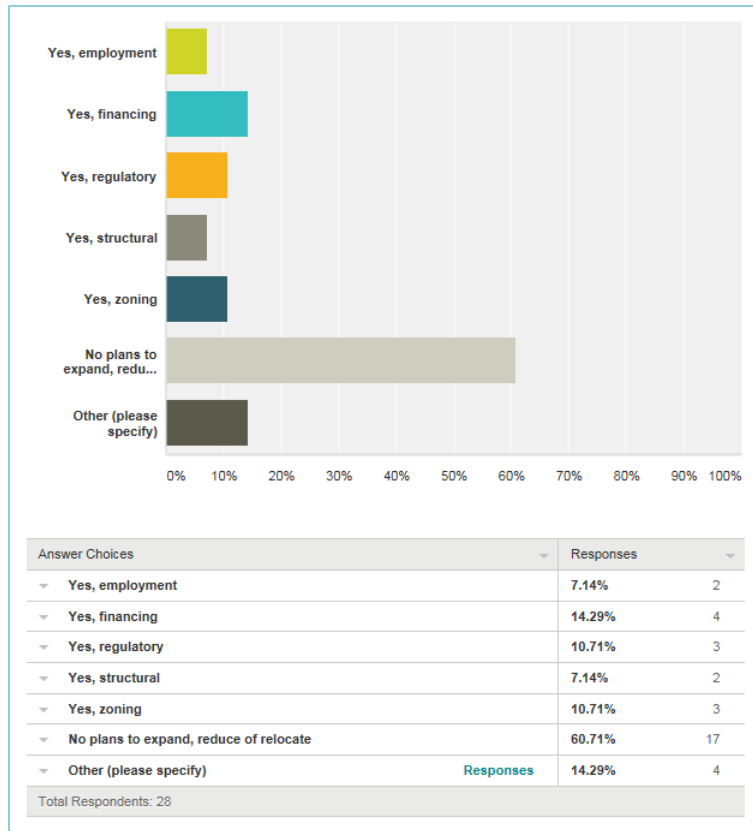
Source: SurveyMonkey

16. Do you plans to expand, reduce, or relocate this business in the foreseeable future?



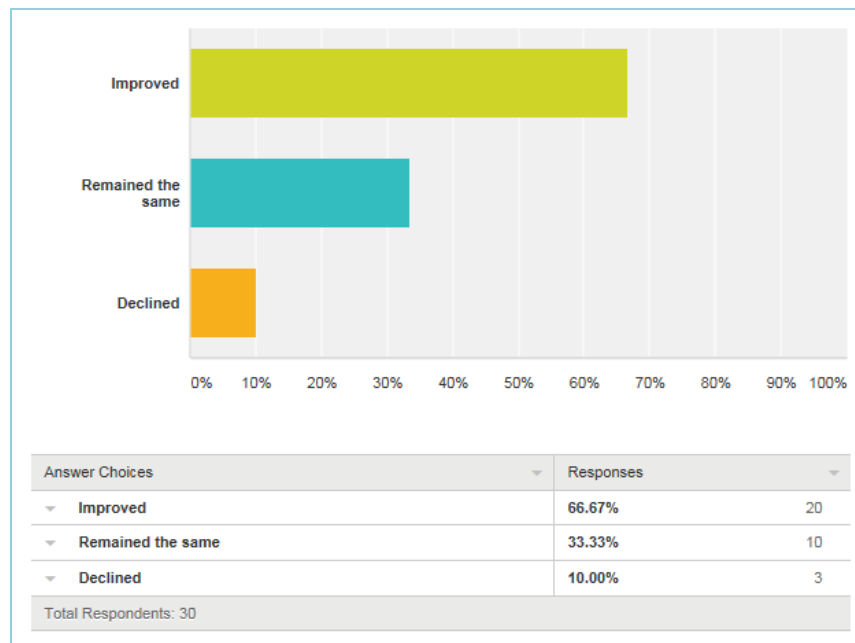
Source: SurveyMonkey

17. If you plan to expand, reduce, or relocate, have you encountered any barriers?



Source: SurveyMonkey

18. Over the past five years, business has...

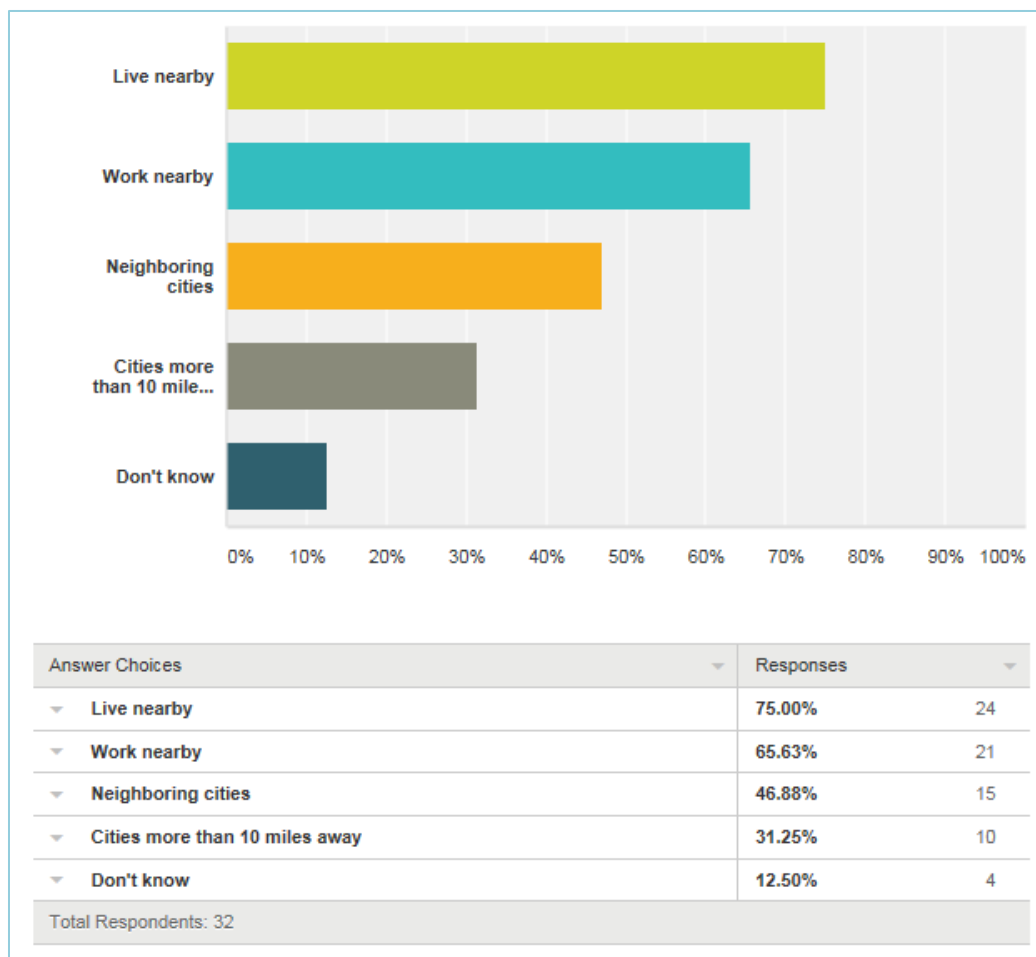


Source: SurveyMonkey

19. Please explain your answer to the last question regarding business activity over the past five years.

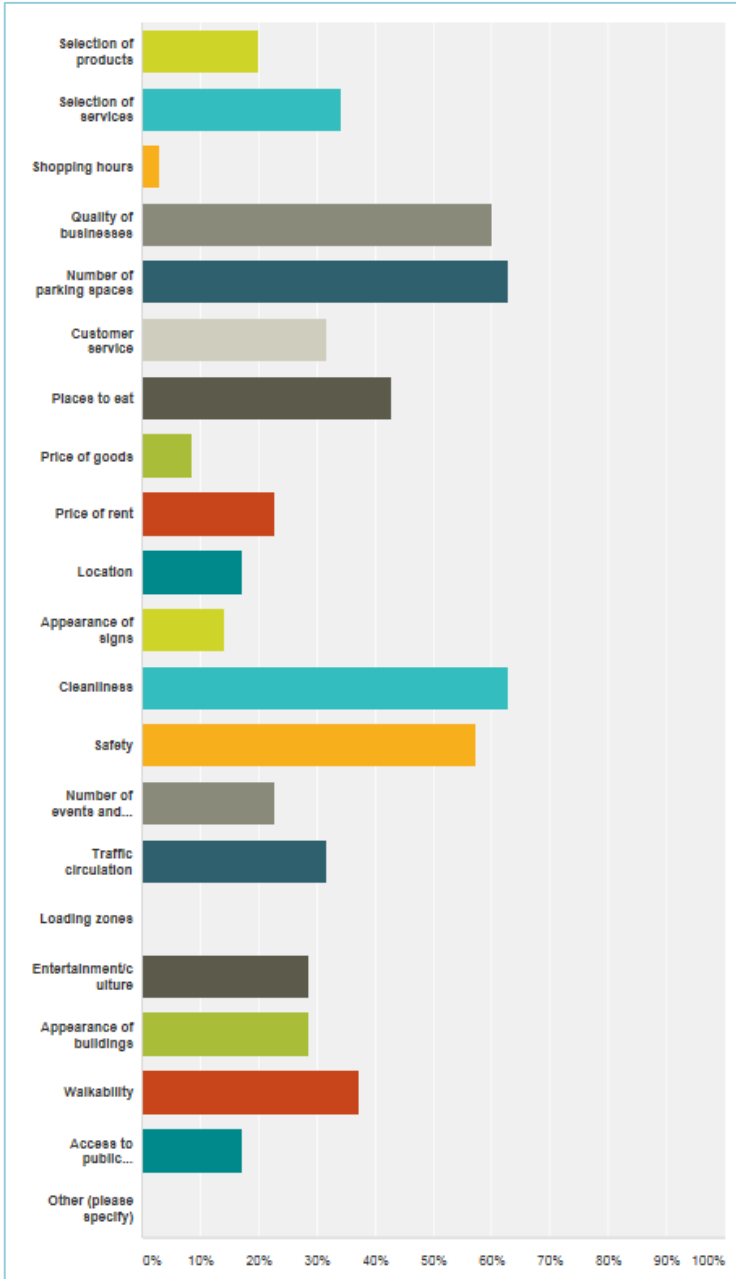
- “The economy has played a big role in how the business has fared. My previous location was sold and torn down, so we had to move. That affected us, also. Finding a new location with our own parking has been a big help. The business is improving greatly”
- “After the addition of the MAX line, business has declined”
- “We had an upswing in circulation for three years, but have been seeing our numbers drop the past two years”
- “Orange Line MAX brings more people to area”
- “Our business has grown very much and is doing well”
- “A lot of promotion and business building to grow business. Light Rail in last fall was the first time our growth trend broke down. Commuters now bypass downtown rather than go through it”
- “We are growing”

20. Where do most of your customers visit from?



Source: SurveyMonkey

21. Of the characteristics listed, which do you feel are most important for the health and vitality of downtown?



Answer Choices	Responses	Count
Selection of products	20.00%	7
Selection of services	34.29%	12
Shopping hours	2.86%	1
Quality of businesses	60.00%	21
Number of parking spaces	62.86%	22
Customer service	31.43%	11
Places to eat	42.86%	15
Price of goods	8.57%	3
Price of rent	22.86%	8
Location	17.14%	6
Appearance of signs	14.29%	5
Cleanliness	62.86%	22
Safety	57.14%	20
Number of events and promotions	22.86%	8
Traffic circulation	31.43%	11
Loading zones	0.00%	0
Entertainment/culture	28.57%	10
Appearance of buildings	28.57%	10
Walkability	37.14%	13
Access to public transportation	17.14%	6
Other (please specify)	0.00%	0
Total Respondents: 35		

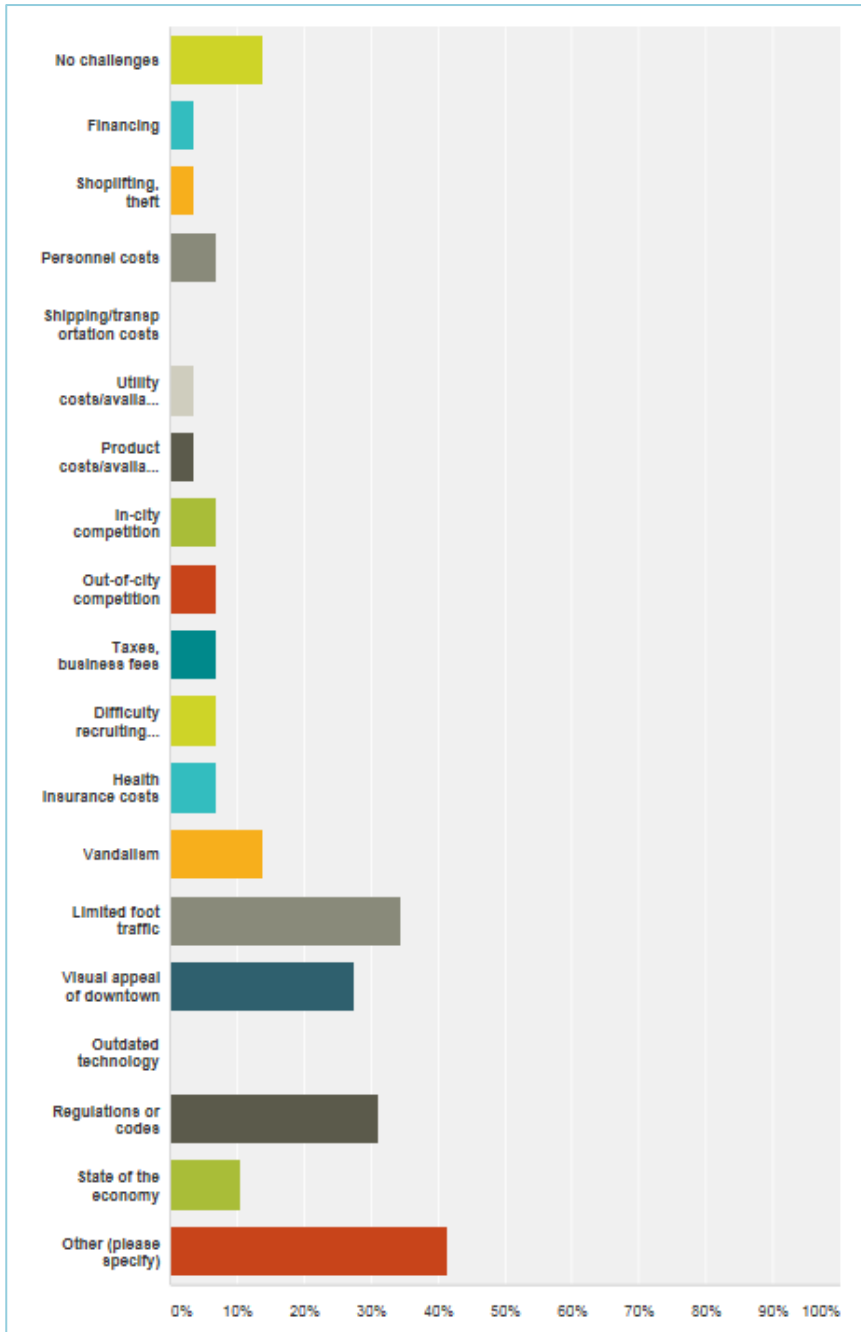
Source: SurveyMonkey

22. What changes have you noticed since you first established your business downtown?

Three respondents noted that there are more people downtown. Three respondents noted that there is less parking and/or parking has become more restrictive. Four respondents noted that they have not seen any changes. Four respondents mentioned the addition of the Orange Line.

- “More inclusion of community at events, increased volume of traffic”
- “More people”
- “Not enough parking for employees, residents, and customers”
- “Better parking, more eateries, increased traffic with the MAX coming in”
- “Trimet, Milwaukie Downtown Business Association, and Neighborhood [District Associations]”
- “Acceptance from the surrounding community”
- “More new people moving to town in the last 12 months. Otherwise, remarkably little has changed in last 3 years. Still too many empty store spaces, and lack of variety of good restaurants and other shopping. Roger and Ives was a nice addition, but limited”
- “Light-rail MAX station construction”
- “The businesses in the area are cleaner/fresher looking”
- “The new MAX line was put in, which was a good thing for street and sidewalk improvements. Increased foot traffic. However, highly effected traffic flow due to added stoplights”
- “Revitalization of the downtown area”
- “Seems to be getting more diverse”

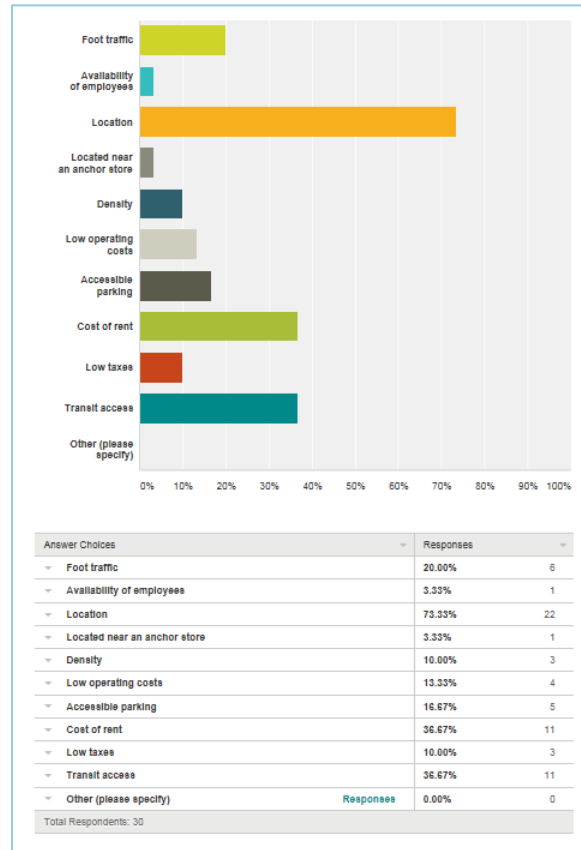
23. Please select any of the following challenges the downtown area is currently dealing with.



Answer Choices	Responses
No challenges	13.79% 4
Financing	3.45% 1
Shoplifting, theft	3.45% 1
Personnel costs	6.90% 2
Shipping/transportation costs	0.00% 0
Utility costs/availability	3.45% 1
Product costs/availability	3.45% 1
In-city competition	6.90% 2
Out-of-city competition	6.90% 2
Taxes, business fees	6.90% 2
Difficulty recruiting staff	6.90% 2
Health insurance costs	6.90% 2
Vandalism	13.79% 4
Limited foot traffic	34.48% 10
Visual appeal of downtown	27.59% 8
Outdated technology	0.00% 0
Regulations or codes	31.03% 9
State of the economy	10.34% 3
Other (please specify)	Responses 41.38% 12
Total Respondents: 29	

Source: SurveyMonkey

24. Please select any of the following strengths of doing business in downtown Milwaukie.



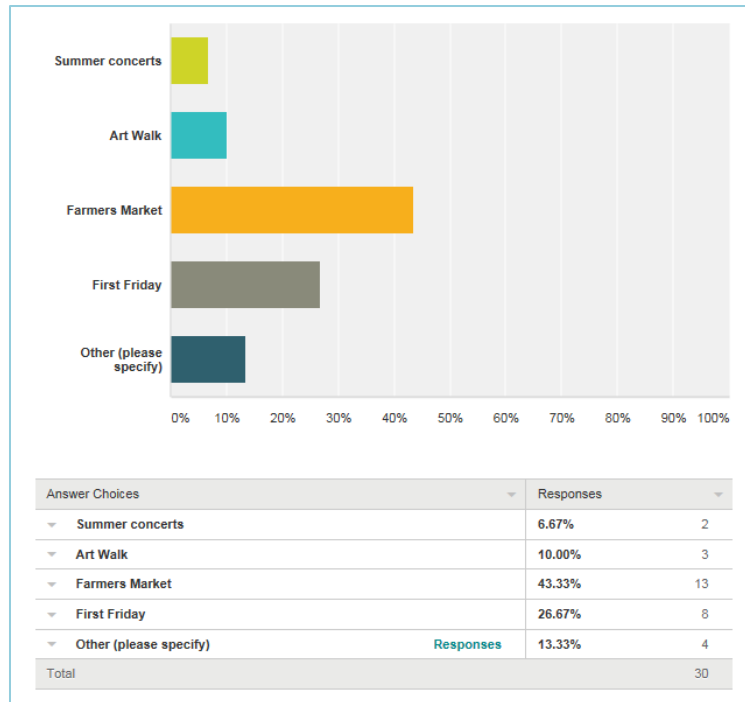
Source: SurveyMonkey

25. Please rate downtown on the following criteria.

	Excellent	Good	Average	Fair	Poor	Total	Weighted Average
Selection of products	3.13% 1	28.13% 9	31.25% 10	31.25% 10	6.25% 2	32	3.09
Selection of services	3.13% 1	28.13% 9	37.50% 12	28.13% 9	3.13% 1	32	3.00
Convenient store hours	6.45% 2	19.35% 6	58.06% 18	16.13% 5	0.00% 0	31	2.84
Number of parking spaces	5.88% 2	2.94% 1	17.65% 6	41.18% 14	32.35% 11	34	3.91
Customer service	3.33% 1	53.33% 16	36.67% 11	6.67% 2	0.00% 0	30	2.47
Places to eat	12.12% 4	36.36% 12	21.21% 7	27.27% 9	3.03% 1	33	2.73
Entertainment/culture	3.23% 1	25.81% 8	29.03% 9	35.48% 11	6.45% 2	31	3.16
Prices of goods	3.13% 1	18.75% 6	68.75% 22	9.38% 3	0.00% 0	32	2.84
Appearance of buildings	0.00% 0	21.88% 7	53.13% 17	25.00% 8	0.00% 0	32	3.03
Appearance of signs	3.13% 1	15.63% 5	50.00% 16	25.00% 8	6.25% 2	32	3.16
Cleanliness	18.18% 6	33.33% 11	30.30% 10	18.18% 6	0.00% 0	33	2.48
Safety/crime	12.12% 4	45.45% 15	24.24% 8	18.18% 6	0.00% 0	33	2.48
Number of events	3.33% 1	43.33% 13	43.33% 13	10.00% 3	0.00% 0	30	2.60
Traffic circulation	0.00% 0	21.21% 7	27.27% 9	36.36% 12	15.15% 5	33	3.45
Quality of businesses	6.25% 2	46.88% 15	31.25% 10	12.50% 4	3.13% 1	32	2.59

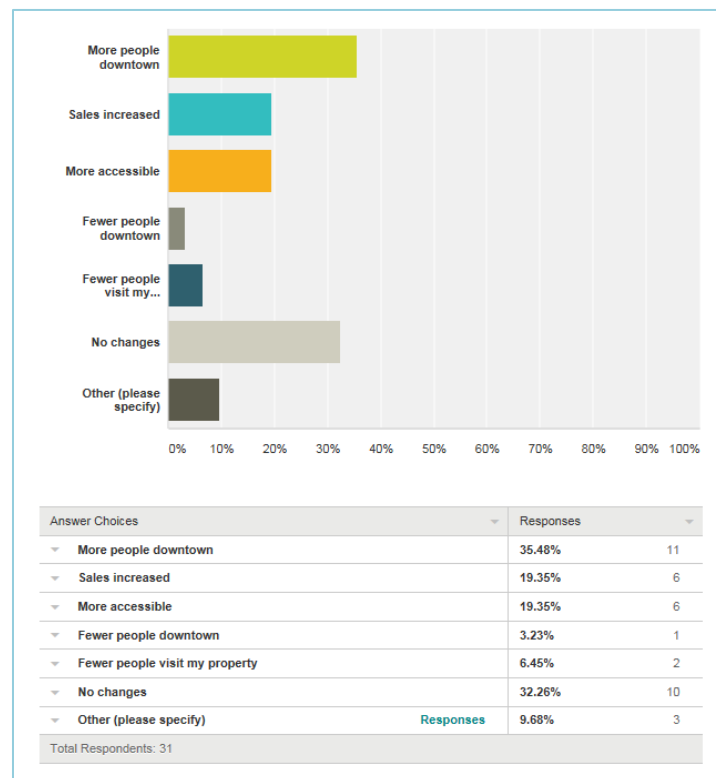
Source: SurveyMonkey

26. Which downtown events generate the most business activity?



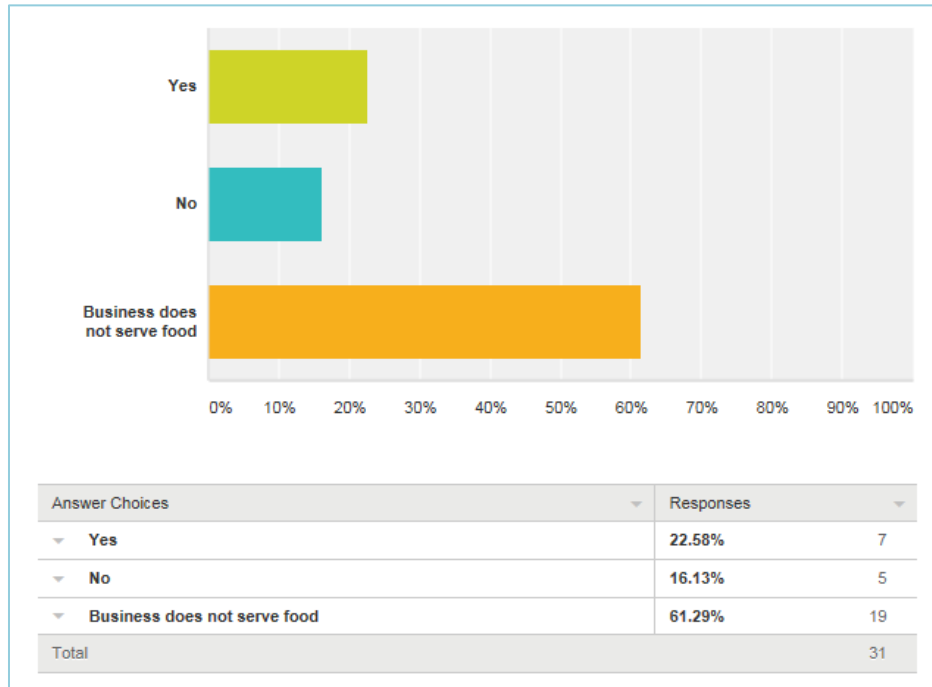
Source: SurveyMonkey

27. How has the recent addition of the Orange Line changed downtown?



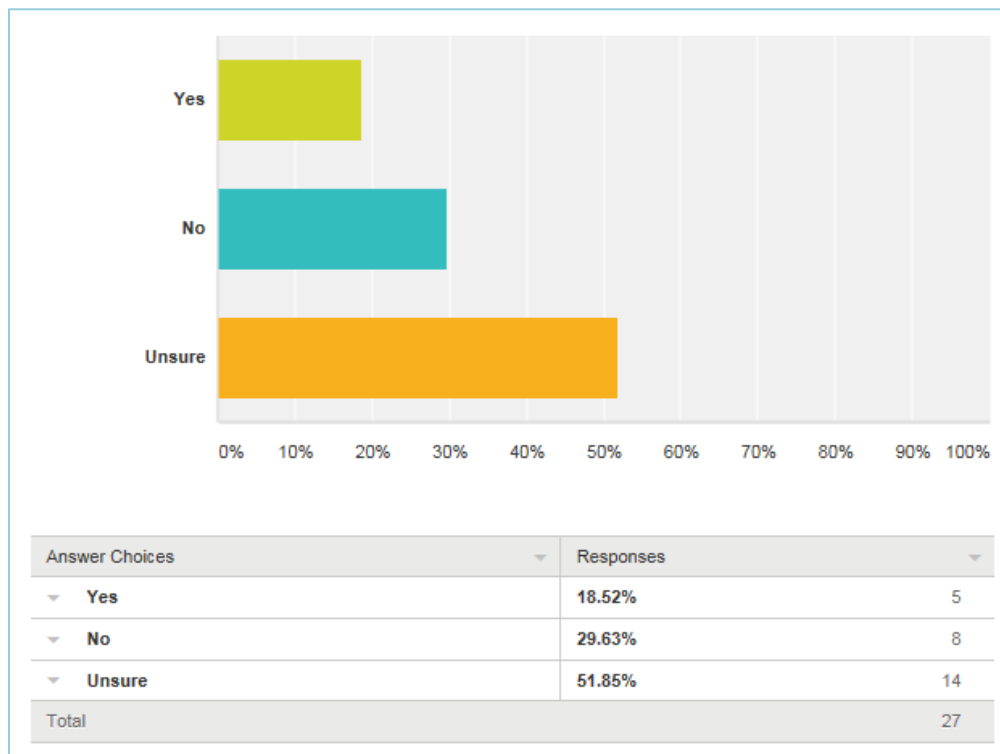
Source: SurveyMonkey

28. If your business is a restaurant or serves food, do you currently have outdoor café seating?



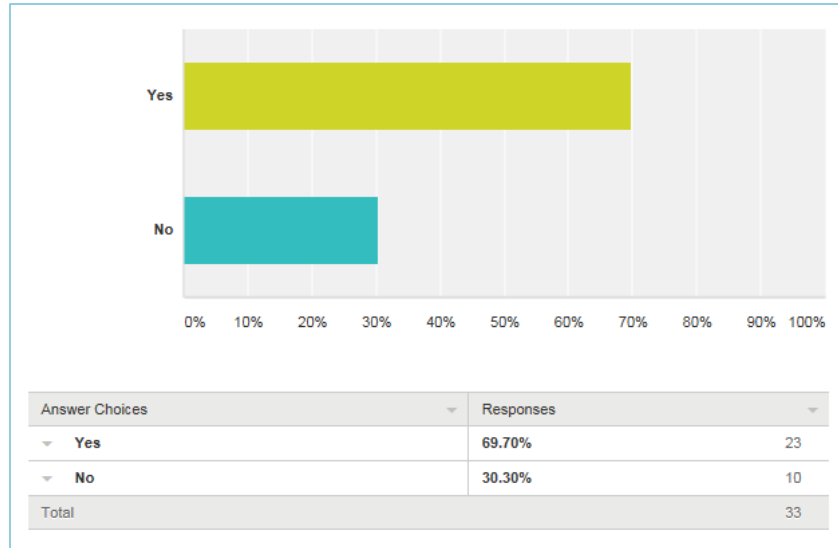
Source: SurveyMonkey

29. Are you interested in the Parklet program?



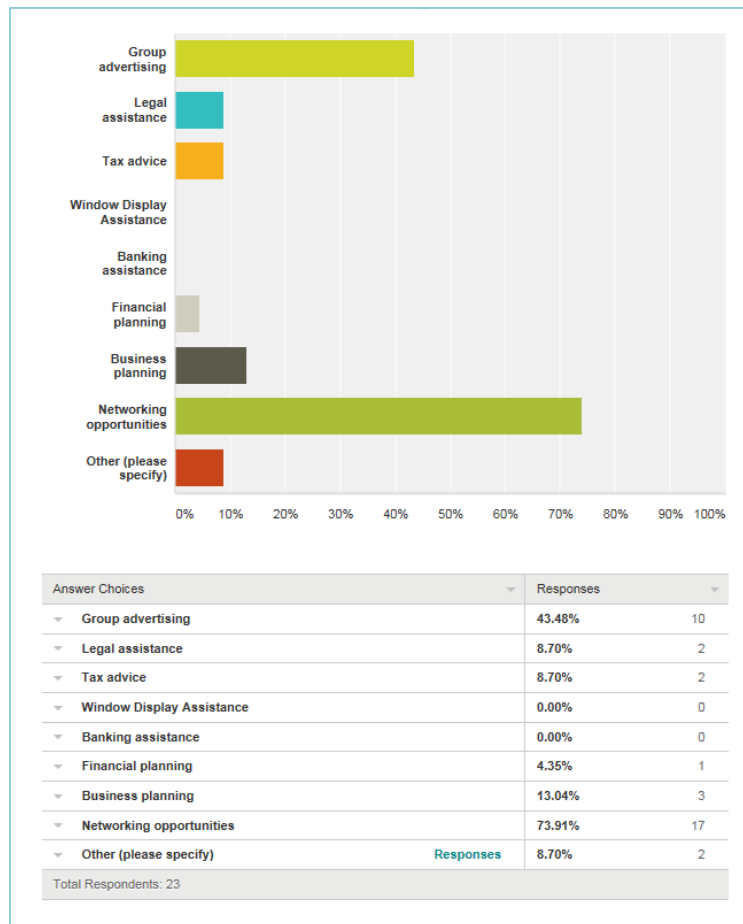
Source: SurveyMonkey

30. Did you know there is a Downtown Business Association?



Source: SurveyMonkey

31. What kinds of services would you be interested in from the Business Association?



Source: SurveyMonkey

32. Select FIVE businesses that should be located near your business.

Answer Choices	Responses	
▼ Clothing store	37.50%	12
▼ Print shop	15.63%	5
▼ Shoe repair	3.13%	1
▼ Greeting card shop	9.38%	3
▼ Attorney	9.38%	3
▼ Toy store	6.25%	2
▼ Coffee/sandwich shop	34.38%	11
▼ Bookstore	25.00%	8
▼ Florist	15.63%	5
▼ Garden center	6.25%	2
▼ Pet supply store	3.13%	1
▼ CD/music store	9.38%	3
▼ Furniture store	3.13%	1
▼ Hardware store	21.88%	7
▼ Recreation facility	12.50%	4
▼ Shoe store	6.25%	2
▼ Advertising firm	6.25%	2
▼ Sporting goods store	9.38%	3
▼ Grocery store	46.88%	15
▼ Leather goods store	6.25%	2
▼ Jeweler	6.25%	2
▼ Antique store	21.88%	7
▼ Health food store	18.75%	6
▼ Dry cleaner	6.25%	2
▼ Drug store	15.63%	5
▼ Barber	9.38%	3
▼ Lodging	15.63%	5
▼ Fresh food market	21.88%	7
▼ Musical supply store	0.00%	0
▼ Medical office	15.63%	5
▼ Accountant	9.38%	3
▼ Bike store	6.25%	2
▼ Photography store	3.13%	1
▼ Hobby store	12.50%	4
▼ Bakery	28.13%	9
▼ Craft store	6.25%	2
▼ Discount store	0.00%	0
▼ Optical goods store	0.00%	0
▼ Office supply store	15.63%	5
▼ Other (please specify)	6.25%	2
Total Respondents: 32		

Source: SurveyMonkey

Appendix F. Property Owner Survey

Letter to Property Owners

June 10, 2016

Dear Property Owner:

The City of Milwaukie Community Development Department is conducting a market study for downtown Milwaukie. We are conducting this study to assess the market along Main Street and the surrounding area. As part of the study, business and property owners are receiving surveys throughout the month of June.

The Community Development Department recognizes the importance of including the perspectives of property owners regarding the challenges they face, the successes they encounter, and the future of downtown. In order to ensure we include your voice, we ask that you take 5 to 7 minutes to complete the survey. If you prefer, you may instead take the survey online at <https://www.surveymonkey.com/r/milwaukiepropertyowners>. Individual responses will be confidential and no personal or business names or information will be used in the final report. The completed survey should be returned to Ashlee Fox *no later than June 30, 2016* through email at FoxA@milwaukieoregon.gov, through fax at 503-774-8236, or through mail at the address listed below:

City of Milwaukie
Attn: Alma Flores
6101 SE Johnson Creek Blvd.
Milwaukie, Oregon 97206

In the meantime, if you have any questions, please contact Ashlee Fox by phone at 503-786-7616 or by email at FoxA@milwaukieoregon.gov. Thank you for taking the time to participate in this important research process.

Sincerely,

Alma Flores
Community Development Director

Property Owner Survey

The City of Milwaukie is developing a market study of your business district. We would like your assistance creating an accurate picture of the business climate. You may instead take the survey online at <https://www.surveymonkey.com/r/milwaukiepropertyowners>. If you have any questions, please contact Ashlee Fox at 503-786-7616 or FoxA@milwaukieoregon.gov.

Date _____

Owner Information

Name of Property Owner _____

Mailing Address of Owner _____

Email _____

Phone _____

Property Information

Address of Property _____

Size of Property (square feet) _____

Name(s) of Business(es) Located on Property _____

1. What is the condition of your property? (On an A-F scale, with A being excellent and F being extremely poor.)

A B C D F

2. How old is the building?

Less than 10 years old 11-25 years old 26-40 years old 41-55 years old

56-70 years old 71-85 years old 86-100 years old More than 100 years old Don't know

3. What use(s) occur on your property?

Residential Institutional Industrial Mixed Use Open Space Commercial Other

If commercial, please specify: _____

4. How many tenants do you have?

0-1 2-3 4-5 6-7 8-9 10 or more

5. Does the property have onsite parking?

Yes No

6. If so, how many parking spaces?

0 1-5 6-10 11-15 16-20 More than 20

7. How many employees are located at your property?

1-2 3-5 6-10 11-25 25+

8. What percent of your property is occupied?

0-25% 26-50% 51-75% 76-99% 100%

- 9. How satisfied are you with your ability to attract and retain tenants?**
Very satisfied Somewhat satisfied Neutral Somewhat unsatisfied Very unsatisfied
- 10. How satisfied are you with current governmental zoning codes downtown?**
Very satisfied Somewhat satisfied Neutral Somewhat unsatisfied Very unsatisfied
Don't know
- 11. How satisfied are you with the resources available to improve your property?**
Very satisfied Somewhat satisfied Neutral Somewhat unsatisfied Very unsatisfied
- 12. How satisfied are you with the location of your property?**
Very satisfied Satisfied Neutral Unsatisfied Very unsatisfied Plan to move
- 13. What improvements have you made to your property over the past year?**
None Clean up Paint Signage Remodel Other _____
- 14. Have you used a storefront improvement grant to make changes to your building?**
Yes No Unsure
- 15. How much money have you invested in your property over the past year?**
\$0-1000 \$1001-2000 \$2001-3000 \$3001-4000 \$4001-5000 More than \$5000
- 16. Would you like to make improvements to your property?**
Yes No Unsure
- 17. What improvements would you make or like to make to the *exterior* of the building/property?**
None Clean up Paint Signage Awnings Remodel Other _____
- 18. What improvements would you make or like to make to the *interior* of the building?**
None Access Paint Remodel Signage Other _____
- 19. If you would like to make any improvements to your property, what barriers have you encountered?**
 Tenant resistance Financing Regulatory Structural Zoning Other _____
 None
- 20. Are you interested in owning any additional property in Milwaukie?**
 Yes No
If you answered no, why not? _____
- 21. What changes have you noticed since you first purchased property downtown?**
- 22. Did you know there is a Business Association downtown?**
Yes No
- 23. What kinds of services would you be interested in from the Business Association?**
Group advertising Legal assistance Tax advice Banking assistance Financial planning
Networking opportunities Other: _____

24. Which downtown events generate the most downtown activity?

Summer concerts Art Walk Farmers Market First Friday Other _____

25. How has the recent addition of the Orange line changed downtown?

More people downtown More people visit my property More accessible

Fewer people downtown Less accessible No changes

26. Of the characteristics listed, which do you feel are most important for the health and vitality of downtown?

<input type="checkbox"/> Selection of products	<input type="checkbox"/> Appearance of signs
<input type="checkbox"/> Selection of services	<input type="checkbox"/> Cleanliness
<input type="checkbox"/> Shopping hours	<input type="checkbox"/> Safety
<input type="checkbox"/> Quality of businesses	<input type="checkbox"/> Number of events and promotions
<input type="checkbox"/> Number of parking spaces	<input type="checkbox"/> Traffic circulation
<input type="checkbox"/> Customer service	<input type="checkbox"/> Loading zones
<input type="checkbox"/> Places to eat	<input type="checkbox"/> Entertainment/culture
<input type="checkbox"/> Price of goods	<input type="checkbox"/> Appearance of buildings
<input type="checkbox"/> Price of rent	<input type="checkbox"/> Walkability
<input type="checkbox"/> Location	<input type="checkbox"/> Access to public transportation

27. Please select any of the following challenges the downtown area is currently dealing with.

<input type="checkbox"/> No problems	<input type="checkbox"/> Product costs/availability	<input type="checkbox"/> Vandalism
<input type="checkbox"/> Financing	<input type="checkbox"/> In-city competition	<input type="checkbox"/> Limited foot traffic
<input type="checkbox"/> Shoplifting, theft	<input type="checkbox"/> Out-of-city competition	<input type="checkbox"/> Visual appeal of downtown
<input type="checkbox"/> Personnel costs	<input type="checkbox"/> Taxes, business fees	<input type="checkbox"/> Outdated technology
<input type="checkbox"/> Shipping/transport costs	<input type="checkbox"/> Difficulty recruiting staff	<input type="checkbox"/> Regulations or codes
<input type="checkbox"/> Utility costs/availability	<input type="checkbox"/> Health insurance costs	<input type="checkbox"/> State of the economy
<input type="checkbox"/> Other: _____		

28. Please select any of the following strengths of doing business in downtown Milwaukie.

<input type="checkbox"/> Foot traffic	<input type="checkbox"/> Low operating costs
<input type="checkbox"/> Availability of employees	<input type="checkbox"/> Accessible parking
<input type="checkbox"/> Location	<input type="checkbox"/> Cost of rent
<input type="checkbox"/> Located near an anchor store	<input type="checkbox"/> Low taxes
<input type="checkbox"/> Density	<input type="checkbox"/> Transit Access
<input type="checkbox"/> Other: _____	

29. Please rate downtown on the following criteria.

Criteria	Excellent	Good	Average	Fair	Poor
Selection of products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Selection of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenient store hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of parking spaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Places to eat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment/culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prices of goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appearance of buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appearance of signs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cleanliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety/crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic circulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30. Select the FIVE businesses that should be located near your property.

<input type="checkbox"/> Clothing store	<input type="checkbox"/> Pet supply store	<input type="checkbox"/> Jeweler	<input type="checkbox"/> Accountant
<input type="checkbox"/> Print shop	<input type="checkbox"/> CD/music store	<input type="checkbox"/> Antique store	<input type="checkbox"/> Bike store
<input type="checkbox"/> Shoe repair	<input type="checkbox"/> Furniture store	<input type="checkbox"/> Health food store	<input type="checkbox"/> Photography store
<input type="checkbox"/> Greeting card shop	<input type="checkbox"/> Hardware store	<input type="checkbox"/> Dry cleaner	<input type="checkbox"/> Hobby store
<input type="checkbox"/> Attorney	<input type="checkbox"/> Recreation facility	<input type="checkbox"/> Drug store	<input type="checkbox"/> Bakery
<input type="checkbox"/> Toy store	<input type="checkbox"/> Shoe store	<input type="checkbox"/> Barber	<input type="checkbox"/> Craft store
<input type="checkbox"/> Coffee/sandwich shop	<input type="checkbox"/> Advertising firm	<input type="checkbox"/> Lodging	<input type="checkbox"/> Discount store
<input type="checkbox"/> Bookstore	<input type="checkbox"/> Sporting goods store	<input type="checkbox"/> Fresh food market	<input type="checkbox"/> Optical goods store
<input type="checkbox"/> Florist	<input type="checkbox"/> Grocery store	<input type="checkbox"/> Musical supply store	<input type="checkbox"/> Office supply store
<input type="checkbox"/> Garden center	<input type="checkbox"/> Leather goods store	<input type="checkbox"/> Medical office	<input type="checkbox"/> Other: _____

Thank you for your time! Completed surveys should be emailed to FoxA@milwaukieoregon.gov, faxed to 503-774-8236, or mailed to:

City of Milwaukie
 Attn: Alma Flores
 6101 SE Johnson Creek Blvd.
 Milwaukie, Oregon 97206

If you would like to receive the results of this study as soon as they are available, please provide us with your email: _____.

Property Owner Survey Results

Methodology

In total, 93 downtown Milwaukie property owners received surveys. Property owner surveys were mailed in early June and 15 surveys completed surveys (16%).

Property Owner Survey Results

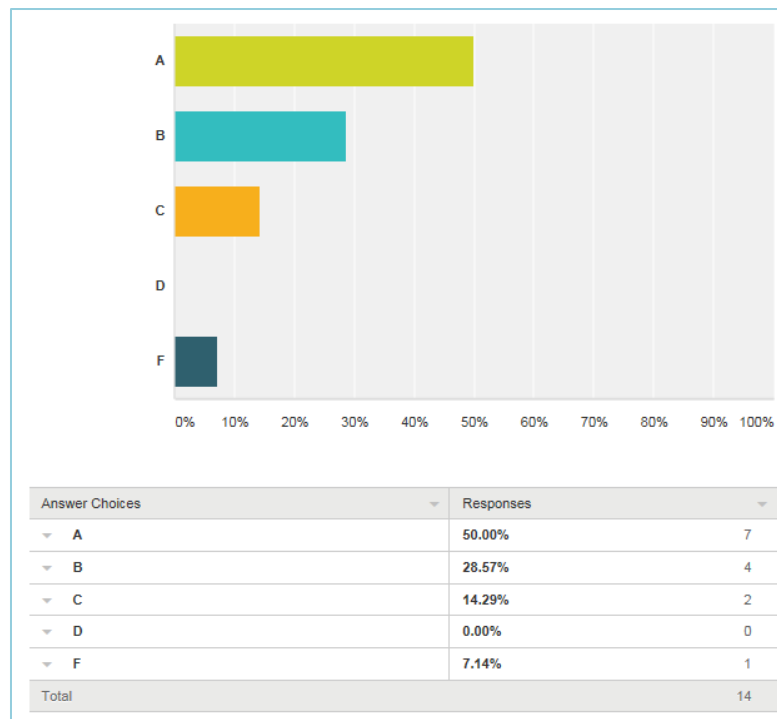
Size of Property

The sizes of properties ranged from 900 square feet to 21,000 square feet, with the median square footage being 2,150 square feet and the average square footage being 4,670 square feet.

Property Use

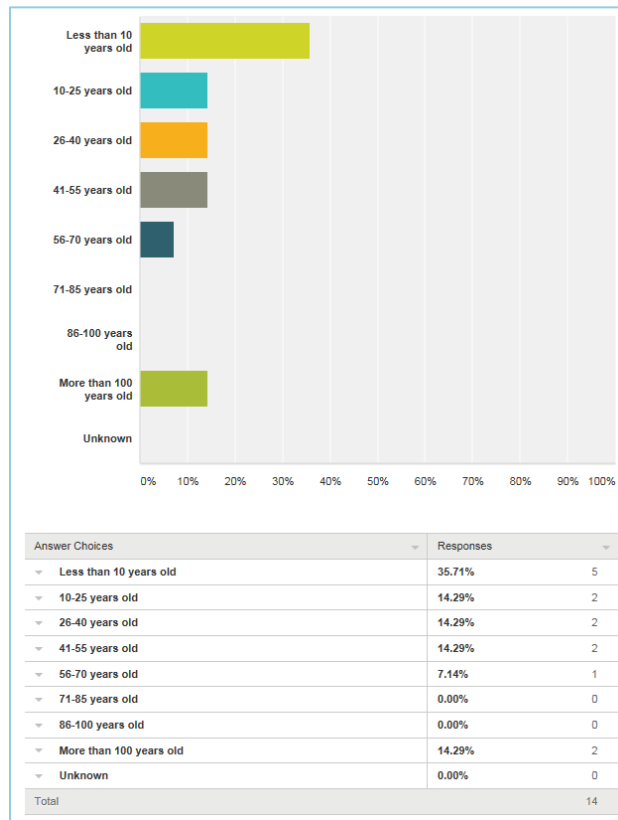
Of the 15 returned surveys, 6 property owners (40%) noted that residential use is the exclusive use of their property, while 9 property owners (60%) noted that there was at least one business located on their property.

1. What is the condition of your property? (On an A-F scale, with A being excellent and F being extremely poor.)



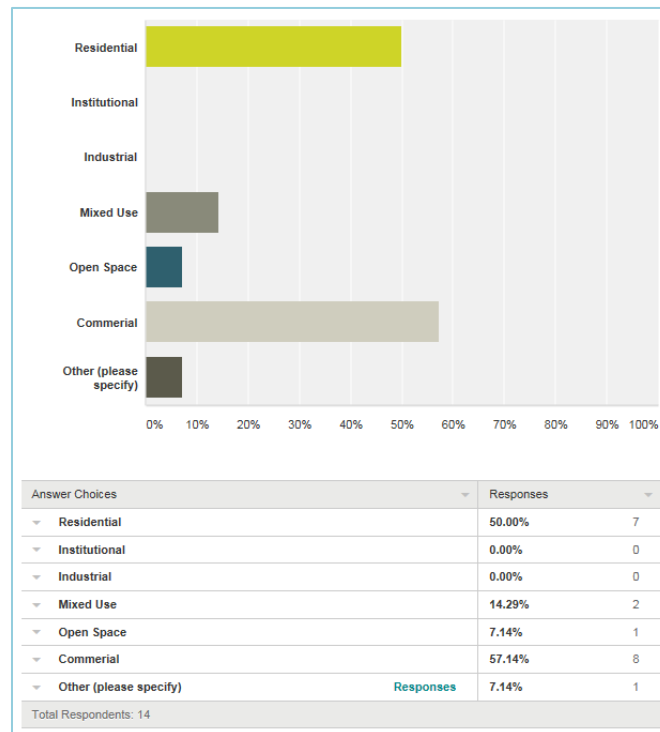
Source: SurveyMonkey

2. How old is the building?



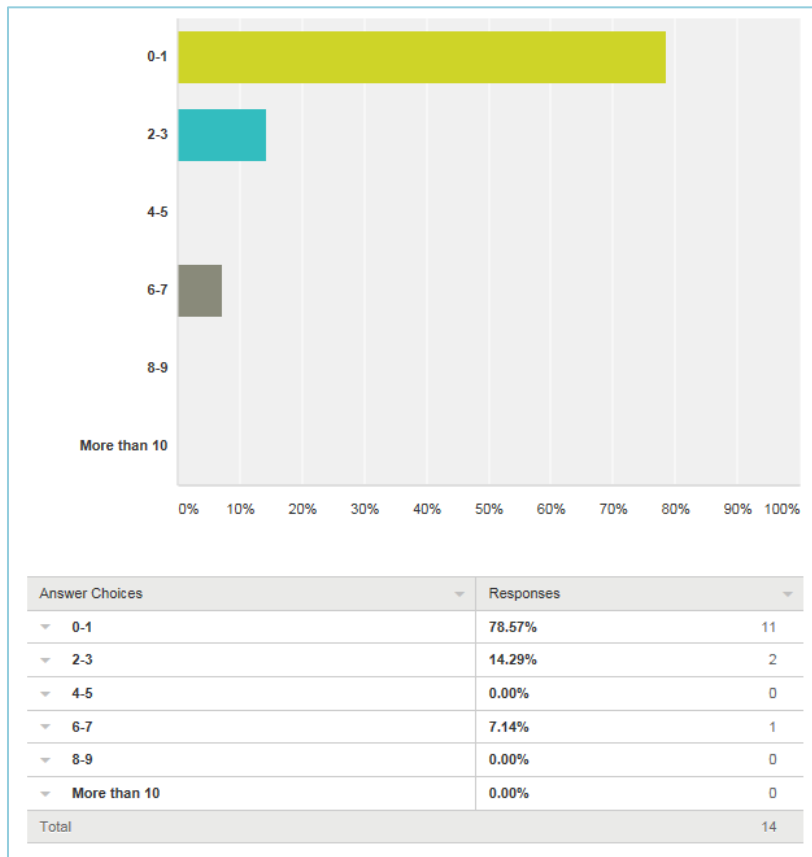
Source: SurveyMonkey

3. What use(s) occur on your property?



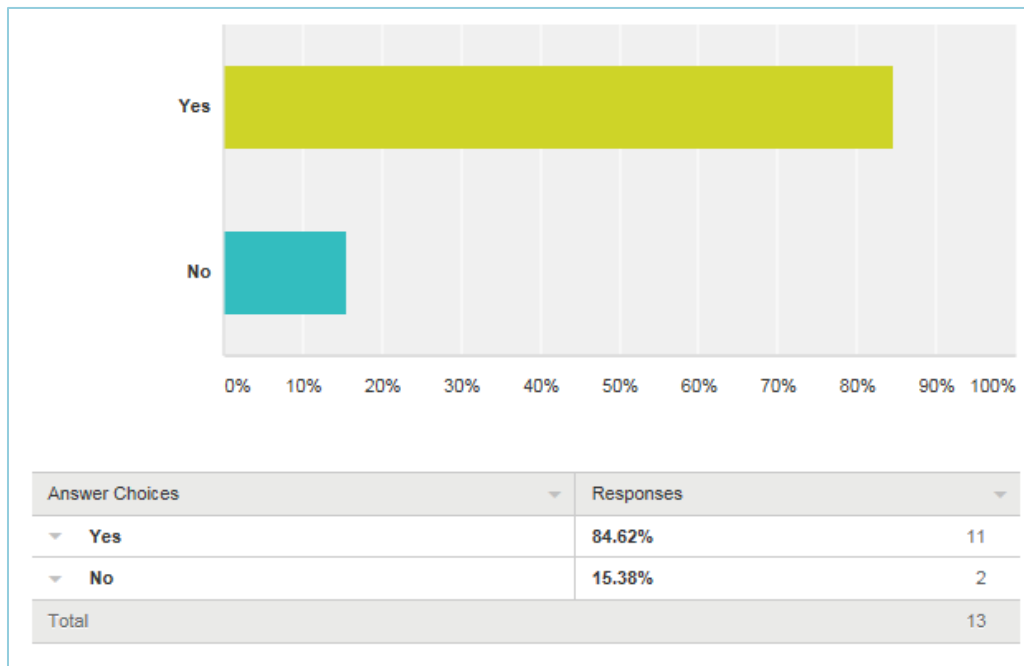
Source: SurveyMonkey

4. How many tenants do you have?



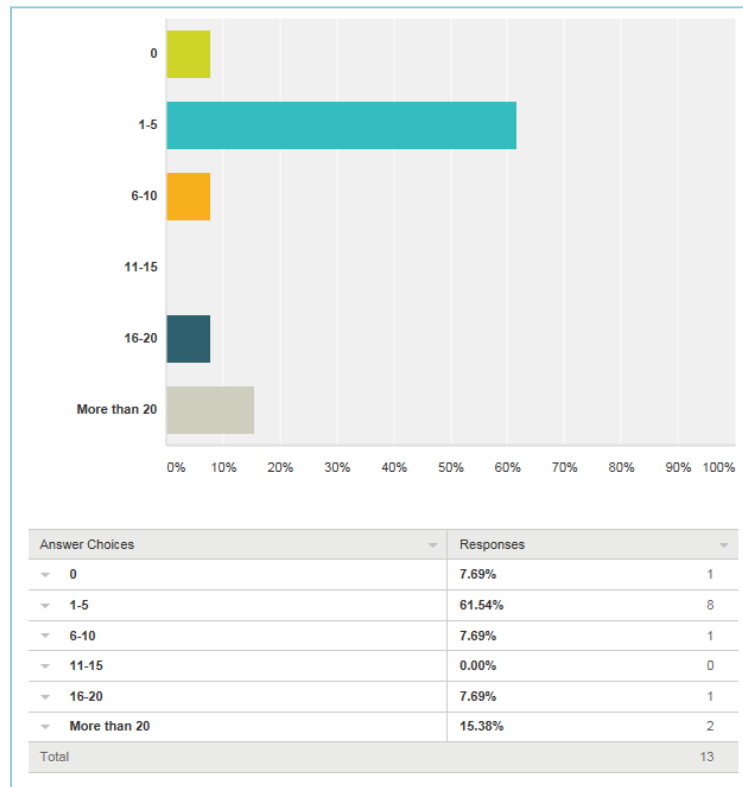
Source: SurveyMonkey

5. Does the property have onsite parking?



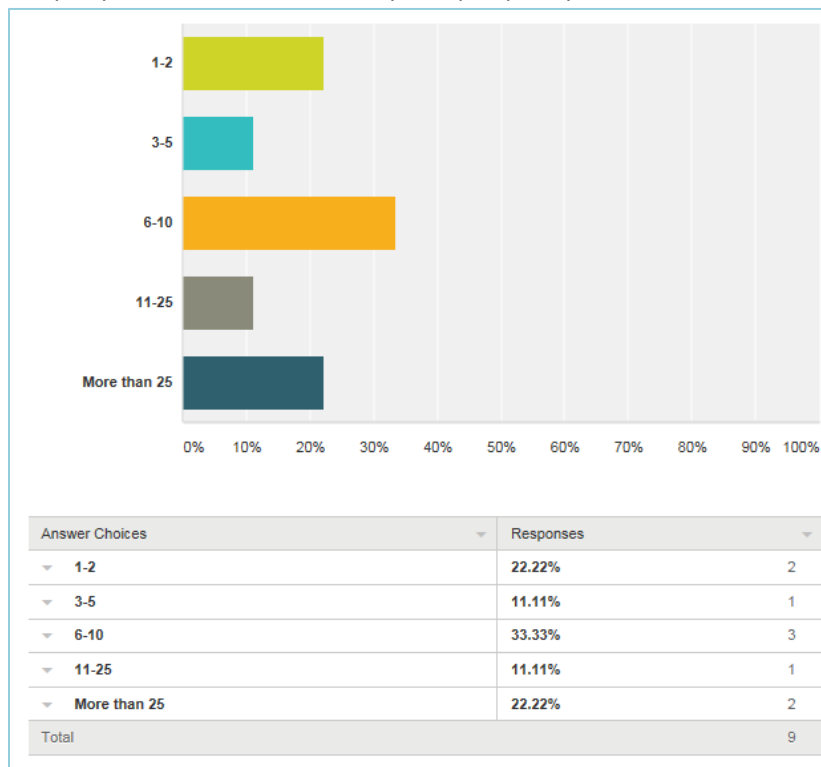
Source: SurveyMonkey

6. If you have onsite parking, how many spaces are available?



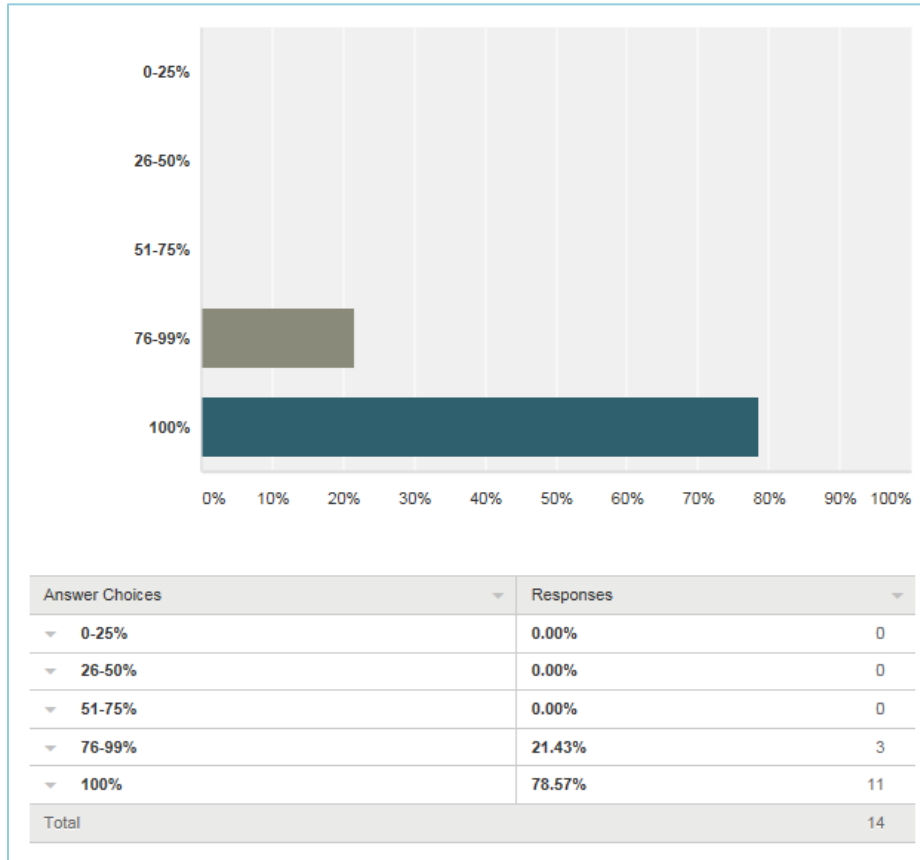
Source: SurveyMonkey

7. How many employees are located at your property?



Source: SurveyMonkey

8. What percent of your property is occupied?



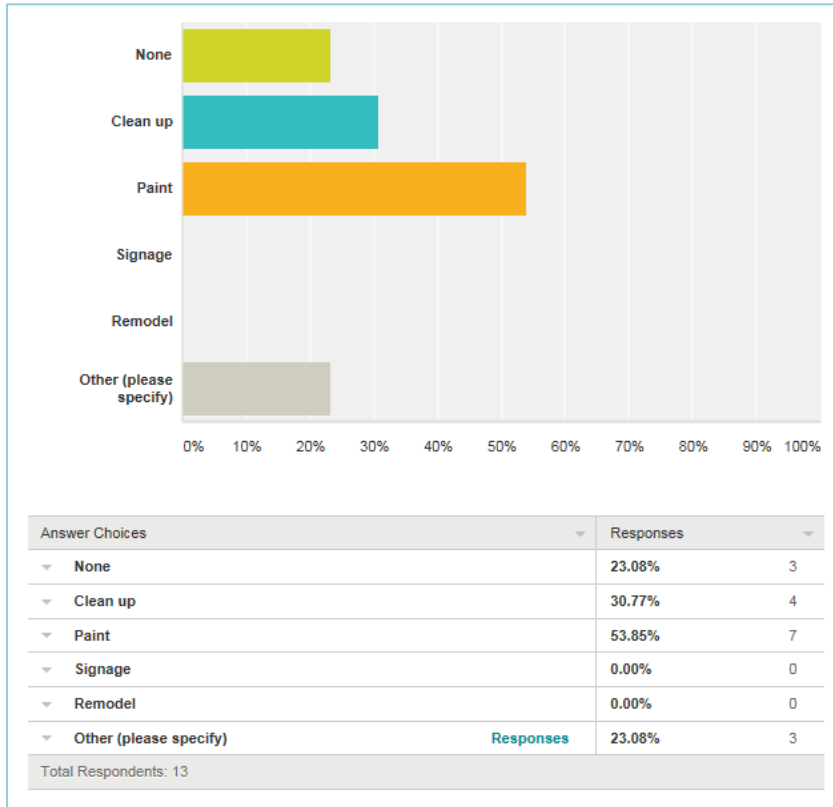
Source: SurveyMonkey

9. How satisfied are you with the following:

	Very Satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Total	Weighted Average
Your ability to attract and retain tenants	50.00% 4	25.00% 2	25.00% 2	0.00% 0	0.00% 0	8	1.75
Current governmental zoning codes downtown	0.00% 0	12.50% 1	75.00% 6	12.50% 1	0.00% 0	8	3.00
Resources available to improve your property	0.00% 0	30.00% 3	70.00% 7	0.00% 0	0.00% 0	10	2.70
Location of your property	50.00% 6	41.67% 5	8.33% 1	0.00% 0	0.00% 0	12	1.58

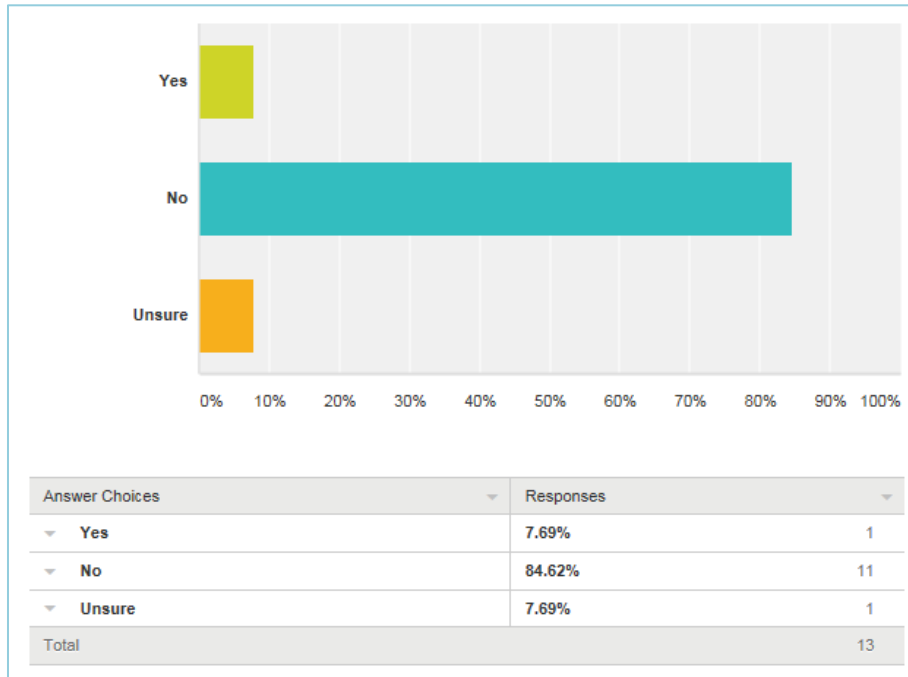
Source: SurveyMonkey

10. What improvements have you made to your property over the past year?



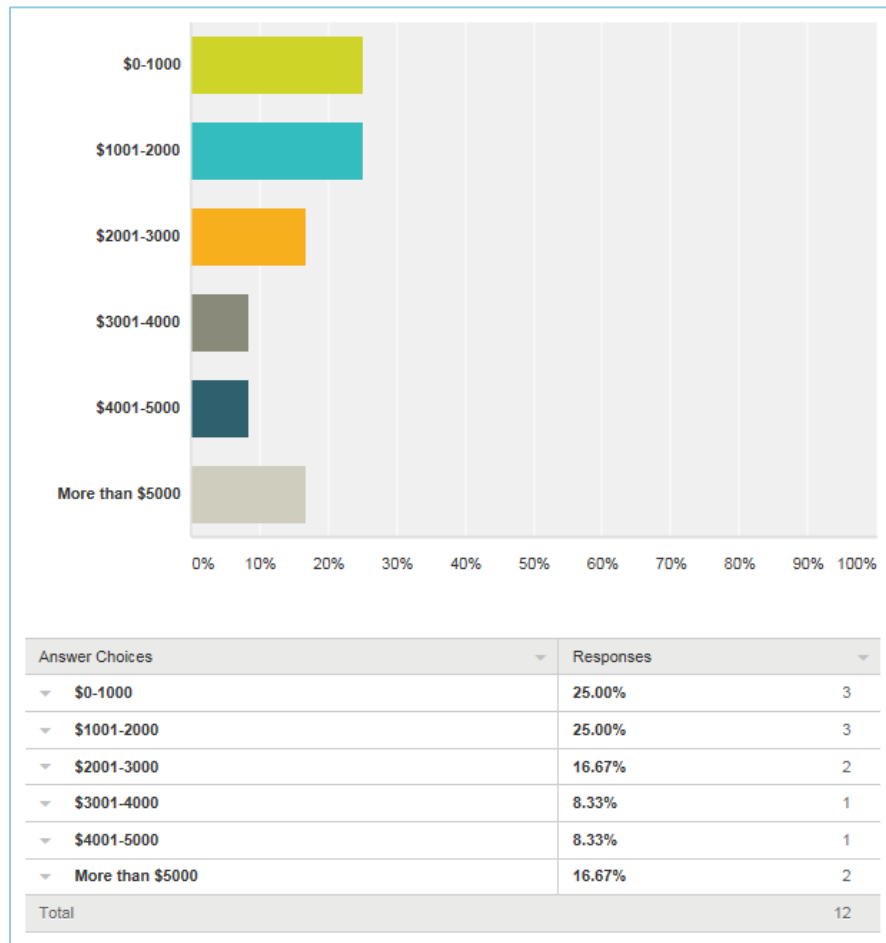
Source: SurveyMonkey

11. Have you used the Storefront Improvement Grant to make changes to your building?



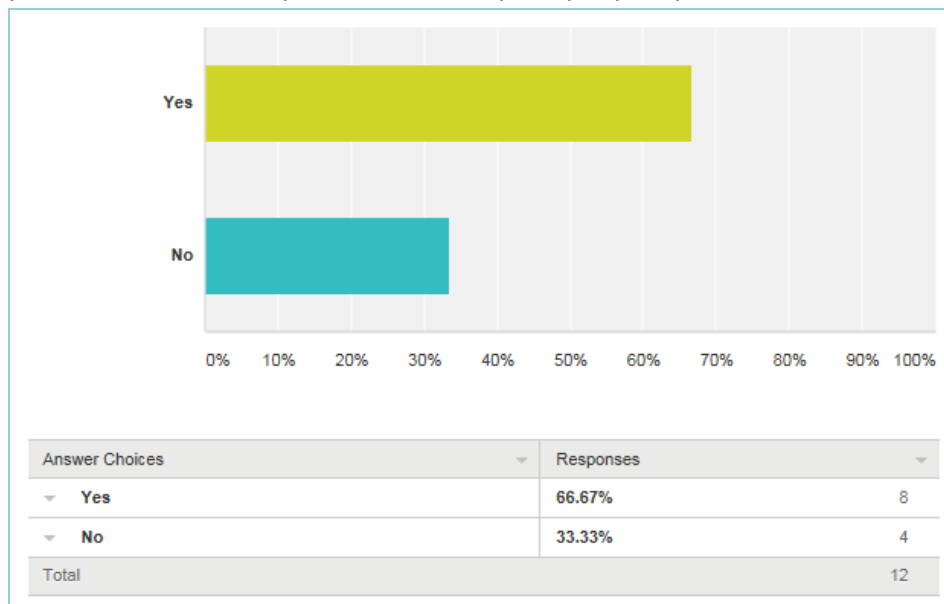
Source: SurveyMonkey

12. How much money have you invested in your property over the past year?



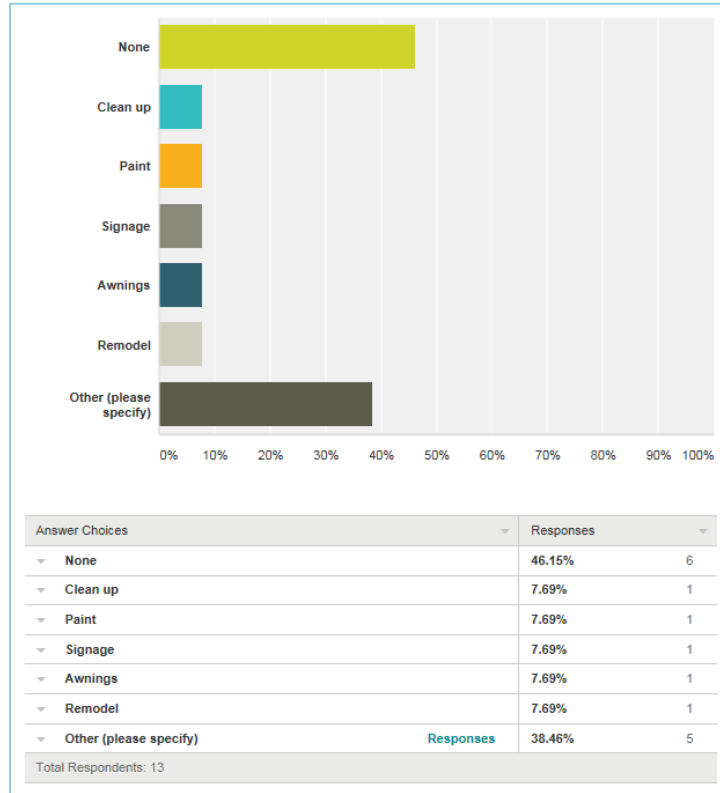
Source: SurveyMonkey

13. Would you like to make improvements to your property?



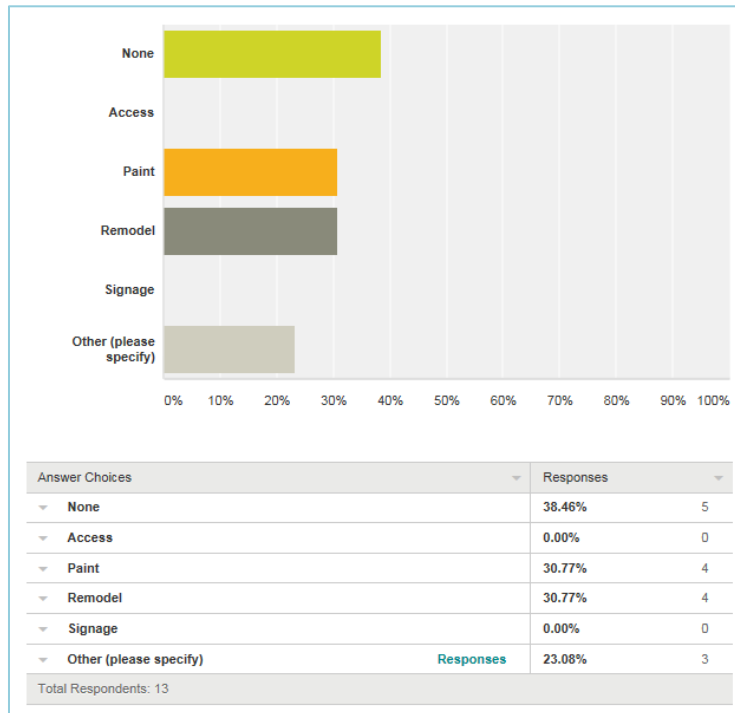
Source: SurveyMonkey

14. What improvements would you like to make to the **exterior** of your property/building?



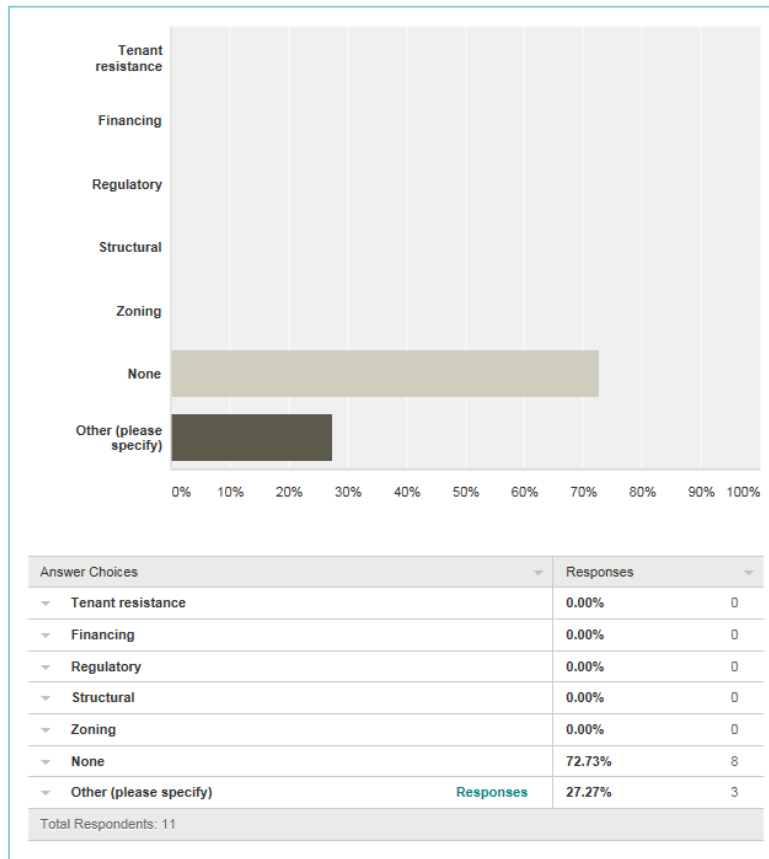
Source: SurveyMonkey

15. What improvements would you like to make to the **interior** of the building?



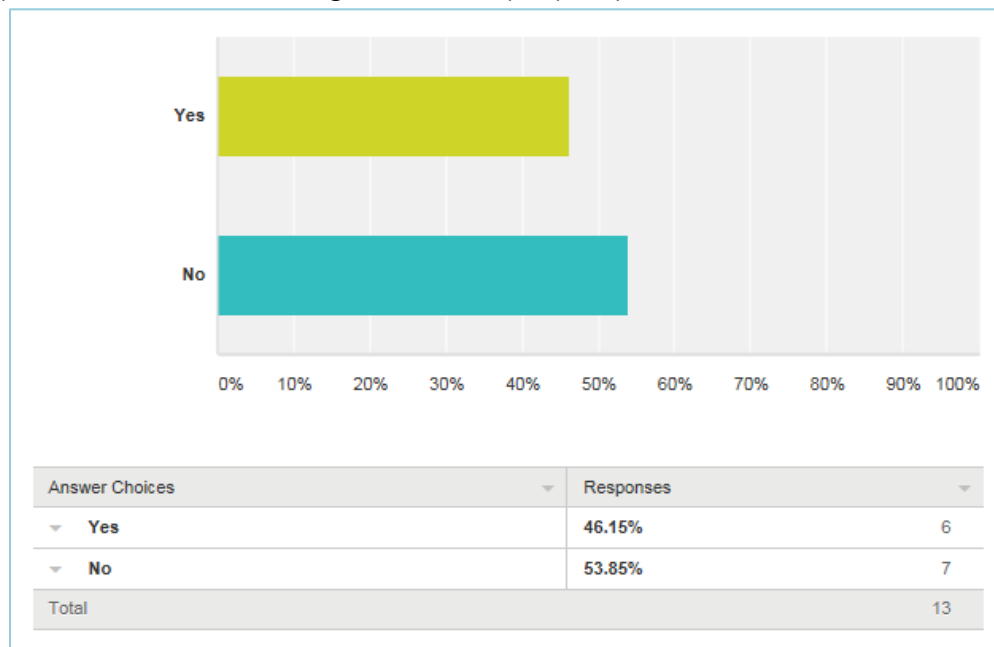
Source: SurveyMonkey

16. If you would like to make any improvements to your property, what barriers have you encountered?



Source: SurveyMonkey

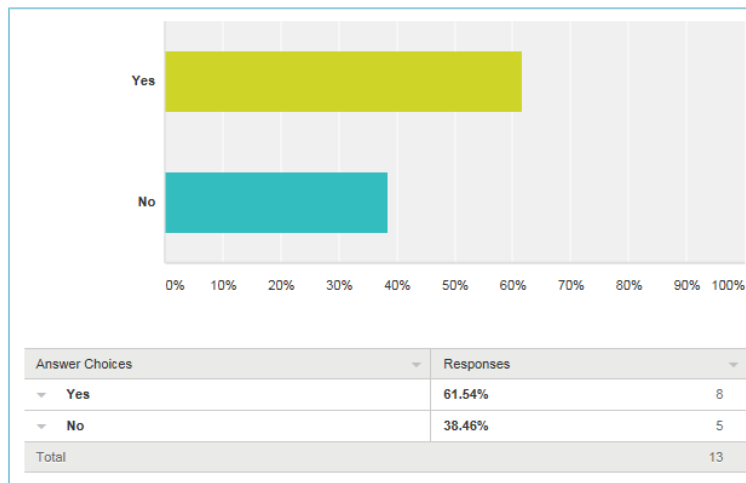
17. Are you interested in owning additional property in Milwaukie?



Source: SurveyMonkey

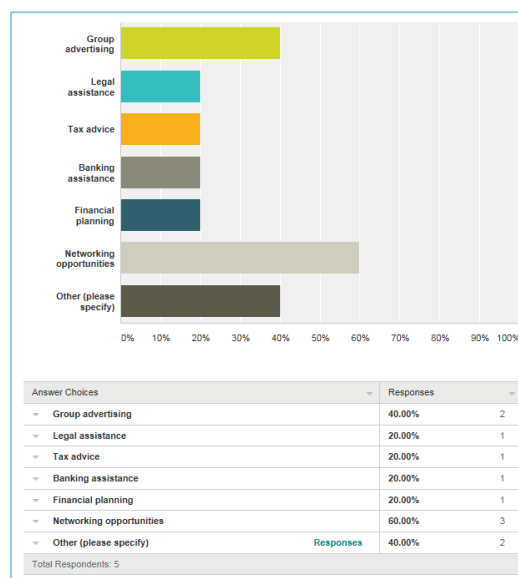
18. What changes have you noticed since you first purchased property downtown?
- “Since the completion of the light rail, there seem to be fewer buses (which is nice) and the freight trains don't blow their whistles every night”
 - “Recently heard that the City will sell the lot where the Farmers Market is located to Metro. The Market is one of the highlights of the downtown and should stay here. It was one of the things that attracted me here”
 - “More interesting small shops and restaurants. Light rail open”
 - “Things are getting busier with more people visiting in downtown Milwaukie”
 - “Improved overall appearance”
 - “Not enough parking for employees, residents, and customers”
 - “More people”

19. Did you know there is a Business Association downtown?



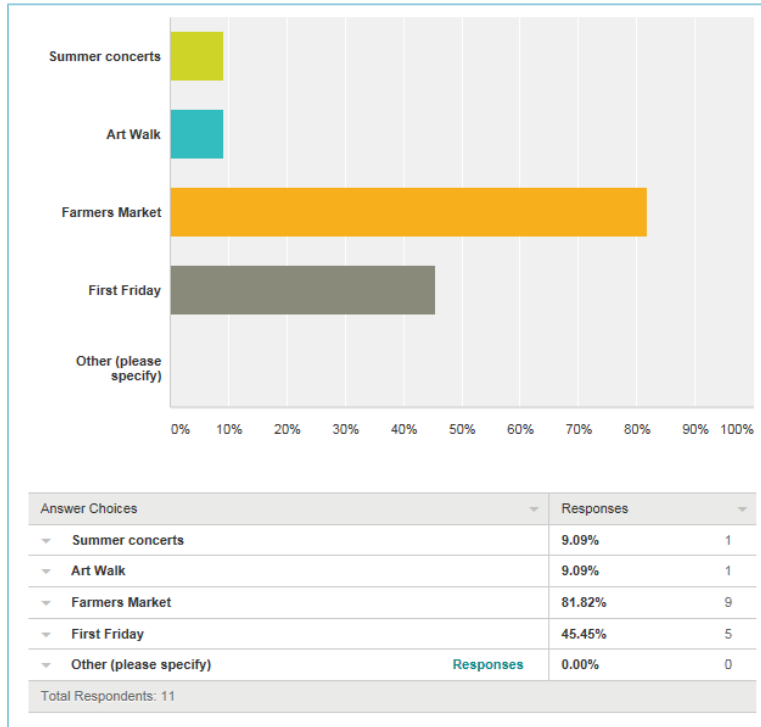
Source: SurveyMonkey

20. What kinds of services would you be most interested in from the Business Association?



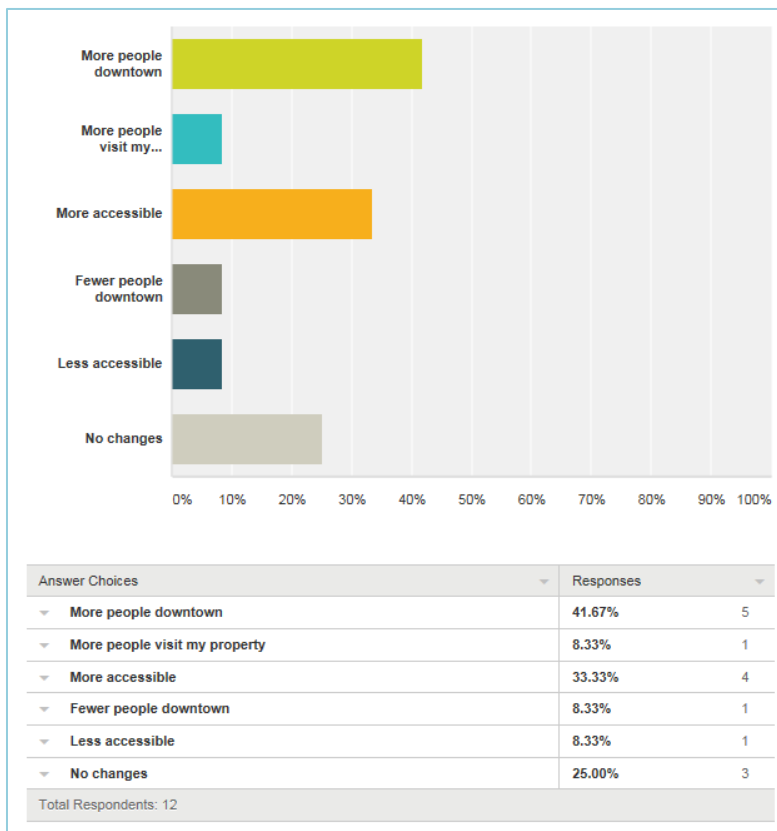
Source: SurveyMonkey

21. Which downtown events generate the most business activity?



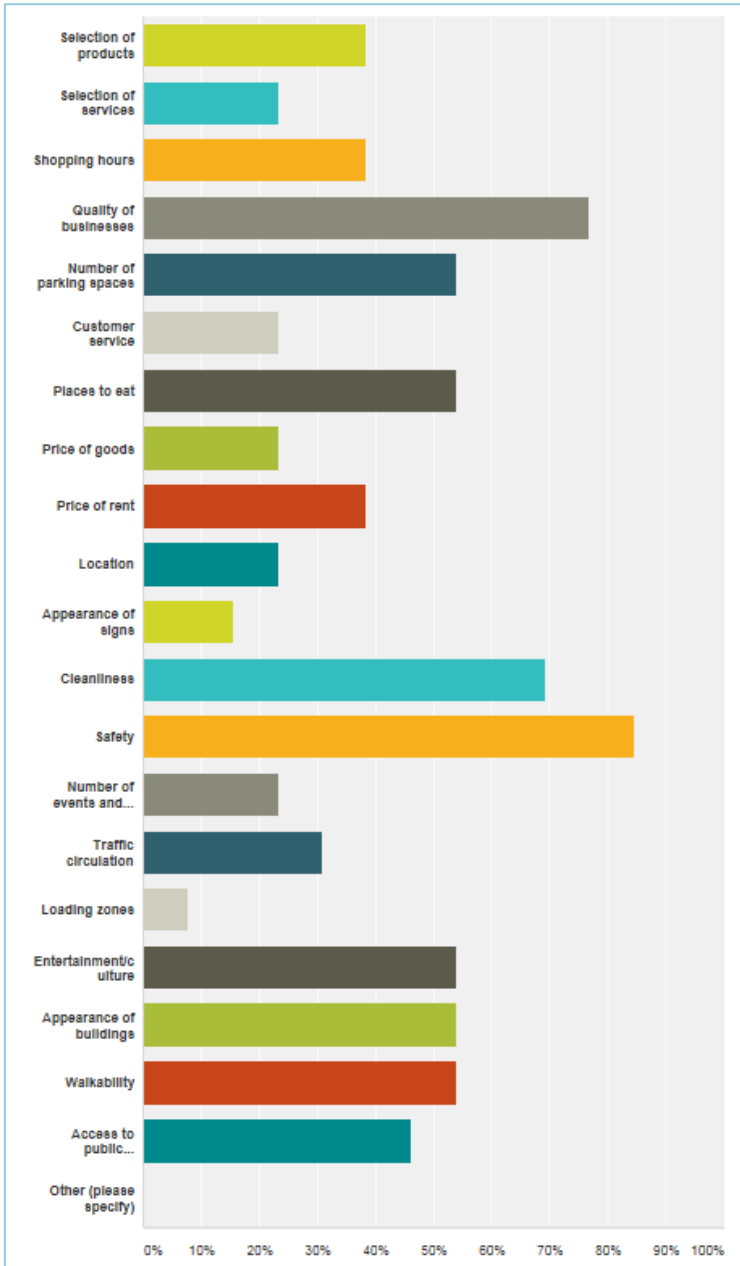
Source: SurveyMonkey

22. How has the recent addition of the Orange Line changed downtown?



Source: SurveyMonkey

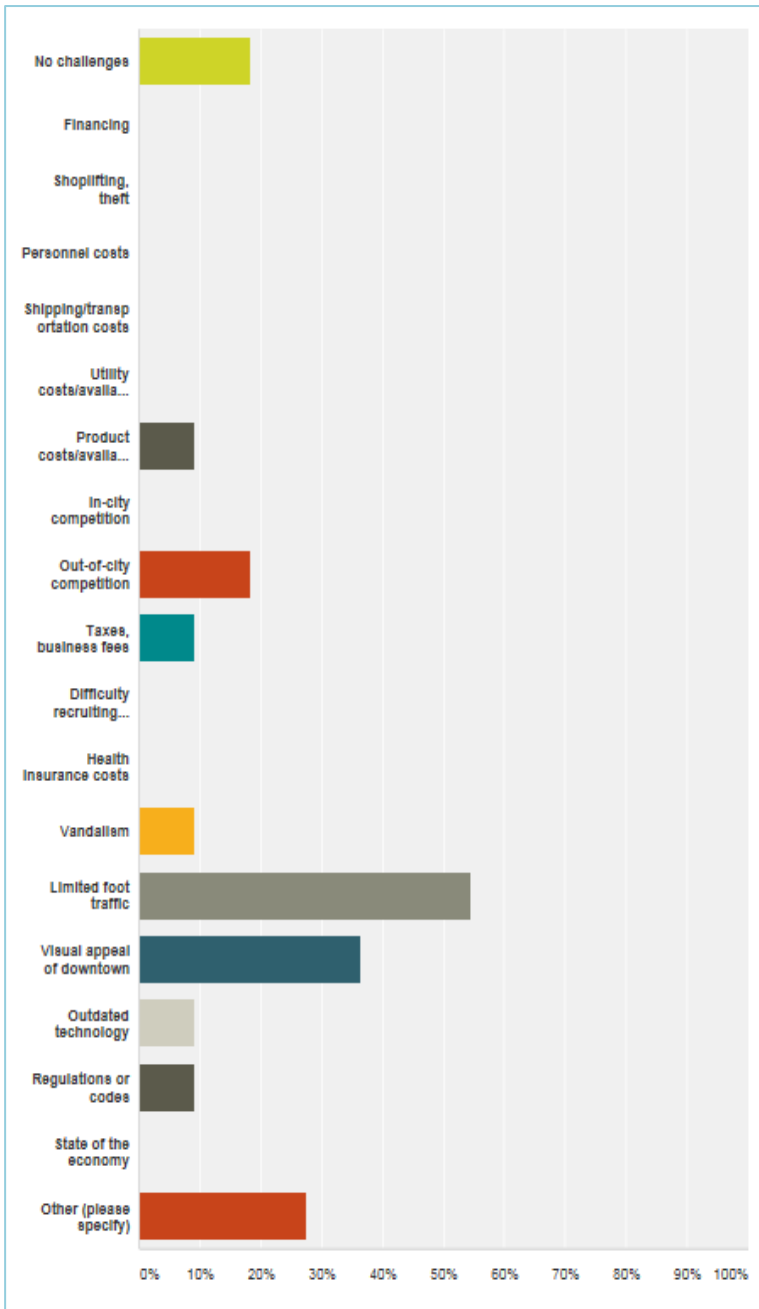
23. Of the characteristics listed, which do you feel are most important for the health and vitality of downtown?



Answer Choices	Responses
Selection of products	38.46% 5
Selection of services	23.08% 3
Shopping hours	38.46% 5
Quality of businesses	76.92% 10
Number of parking spaces	53.85% 7
Customer service	23.08% 3
Places to eat	53.85% 7
Price of goods	23.08% 3
Price of rent	38.46% 5
Location	23.08% 3
Appearance of signs	15.38% 2
Cleanliness	69.23% 9
Safety	84.62% 11
Number of events and promotions	23.08% 3
Traffic circulation	30.77% 4
Loading zones	7.69% 1
Entertainment/culture	53.85% 7
Appearance of buildings	53.85% 7
Walkability	53.85% 7
Access to public transportation	46.15% 6
Other (please specify)	Responses 0.00% 0
Total Respondents: 13	

Source: SurveyMonkey

24. Please select any of the following challenges the downtown area is currently dealing with.



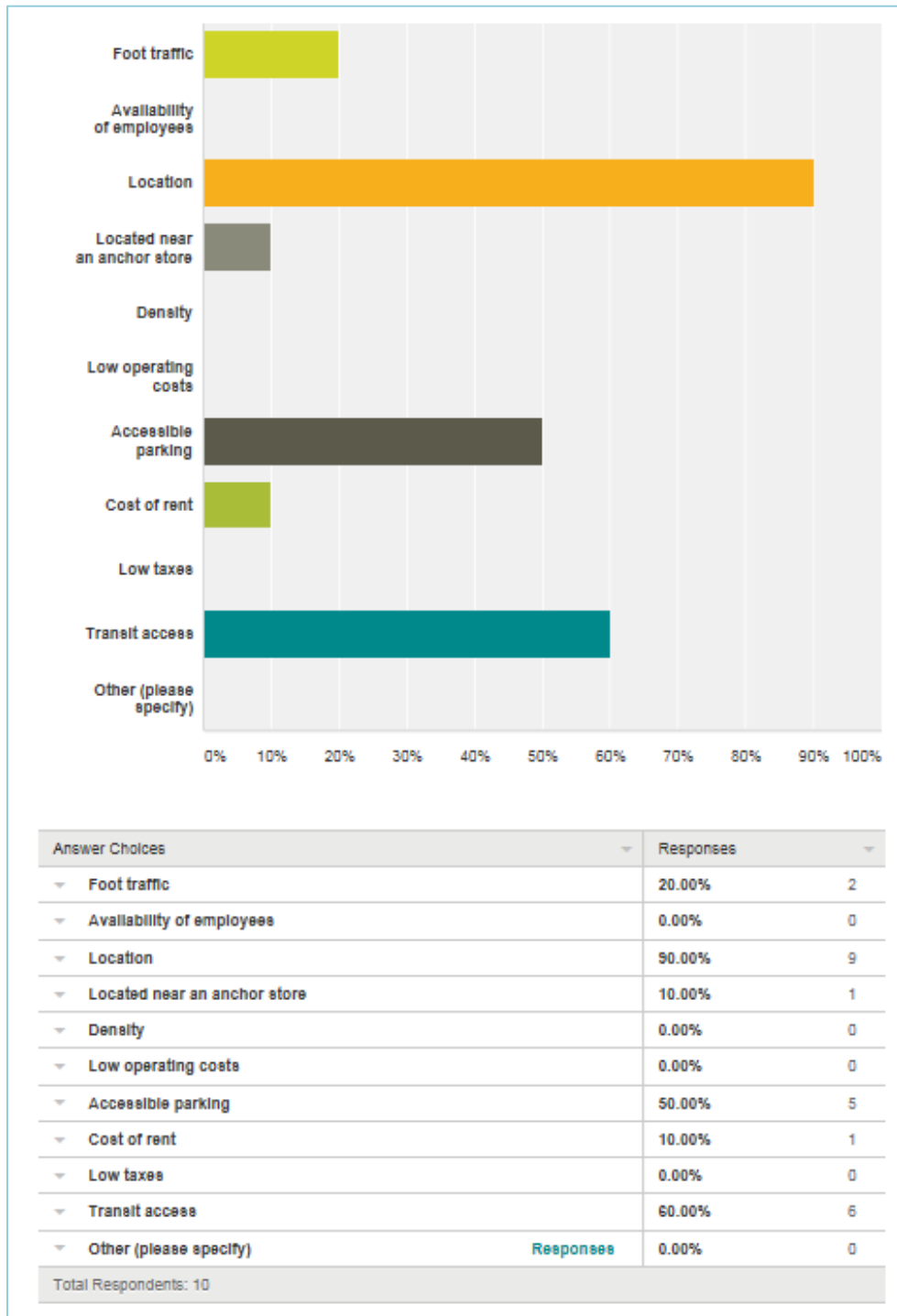
Answer Choices	Responses
▼ No challenges	18.18% 2
▼ Financing	0.00% 0
▼ Shoplifting, theft	0.00% 0
▼ Personnel costs	0.00% 0
▼ Shipping/transportation costs	0.00% 0
▼ Utility costs/availability	0.00% 0
▼ Product costs/availability	9.09% 1
▼ In-city competition	0.00% 0
▼ Out-of-city competition	18.18% 2
▼ Taxes, business fees	9.09% 1
▼ Difficulty recruiting staff	0.00% 0
▼ Health insurance costs	0.00% 0
▼ Vandalism	9.09% 1
▼ Limited foot traffic	54.55% 6
▼ Visual appeal of downtown	36.36% 4
▼ Outdated technology	9.09% 1
▼ Regulations or codes	9.09% 1
▼ State of the economy	0.00% 0
▼ Other (please specify) Responses	27.27% 3
Total Respondents: 11	

Source: SurveyMonkey

Other responses:

- "Too many shabby buildings/businesses"
- "Lack of sufficient parking after Texaco project begins"
- "Dark Horse has way too many sites tied up"

25. Please select any of the following strengths of doing business in downtown Milwaukie.



Source: SurveyMonkey

26. Please rate downtown on the following criteria.

	Excellent	Good	Average	Fair	Poor	Total	Weighted Average
Selection of products	7.14% 1	7.14% 1	28.57% 4	35.71% 5	21.43% 3	14	3.57
Selection of services	7.14% 1	21.43% 3	35.71% 5	21.43% 3	14.29% 2	14	3.14
Convenient store hours	7.14% 1	7.14% 1	42.86% 6	35.71% 5	7.14% 1	14	3.29
Number of parking spaces	7.14% 1	21.43% 3	28.57% 4	14.29% 2	28.57% 4	14	3.36
Customer service	9.09% 1	45.45% 5	36.36% 4	9.09% 1	0.00% 0	11	2.45
Places to eat	7.14% 1	42.86% 6	14.29% 2	28.57% 4	7.14% 1	14	2.86
Entertainment/culture	8.33% 1	33.33% 4	0.00% 0	33.33% 4	25.00% 3	12	3.33
Prices of goods	7.14% 1	35.71% 5	28.57% 4	21.43% 3	7.14% 1	14	2.86
Appearance of buildings	14.29% 2	7.14% 1	50.00% 7	21.43% 3	7.14% 1	14	3.00
Appearance of signs	7.14% 1	14.29% 2	64.29% 9	0.00% 0	14.29% 2	14	3.00
Cleanliness	14.29% 2	28.57% 4	35.71% 5	21.43% 3	0.00% 0	14	2.64
Safety/crime	7.14% 1	35.71% 5	42.86% 6	0.00% 0	14.29% 2	14	2.79
Number of events	7.69% 1	46.15% 6	30.77% 4	15.38% 2	0.00% 0	13	2.54
Traffic circulation	7.14% 1	7.14% 1	35.71% 5	28.57% 4	21.43% 3	14	3.50
Quality of businesses	7.14% 1	28.57% 4	28.57% 4	28.57% 4	7.14% 1	14	3.00

Source: SurveyMonkey

27. Select FIVE businesses that should be located near your property.

Answer Choices	Responses	
▼ Clothing store	26.67%	4
▼ Print shop	6.67%	1
▼ Shoe repair	0.00%	0
▼ Greeting card shop	0.00%	0
▼ Attorney	6.67%	1
▼ Toy store	0.00%	0
▼ Coffee/sandwich shop	20.00%	3
▼ Bookstore	13.33%	2
▼ Florist	13.33%	2
▼ Garden center	6.67%	1
▼ Pet supply store	20.00%	3
▼ CD/music store	13.33%	2
▼ Furniture store	0.00%	0
▼ Hardware store	6.67%	1
▼ Recreation facility	6.67%	1
▼ Shoe store	0.00%	0
▼ Advertising firm	0.00%	0
▼ Sporting goods store	6.67%	1
▼ Grocery store	66.67%	10
▼ Leather goods store	0.00%	0
▼ Jeweler	0.00%	0
▼ Antique store	6.67%	1
▼ Health food store	33.33%	5
▼ Dry cleaner	6.67%	1
▼ Drug store	6.67%	1
▼ Barber	13.33%	2
▼ Lodging	13.33%	2
▼ Fresh food market	40.00%	6
▼ Musical supply store	0.00%	0
▼ Medical office	6.67%	1
▼ Accountant	0.00%	0
▼ Bike store	26.67%	4
▼ Photography store	0.00%	0
▼ Hobby store	0.00%	0
▼ Bakery	46.67%	7
▼ Craft store	0.00%	0
▼ Discount store	0.00%	0
▼ Optical goods store	0.00%	0
▼ Office supply store	20.00%	3
▼ Other (please specify)	Responses	26.67% 4
Total Respondents: 15		

Source: SurveyMonkey

Other responses:

- "Nail salon"
- "What downtown really needs is residential development - nicer condos and apartments - that will increase demand for businesses"
- Yoga studio, something in the "green" architecture/energy/landscaping arena
- "Restaurant"

Appendix G. Building Typology and Streetscape Amenity Condition Grading Scales

When conducting the downtown inventory, grading scales were used for consistency. It should be noted, however, that when property owners rated the condition of their own properties, they did not have access to this scale.

Building Typology Condition Grading Scale

A – Excellent condition. No repairs or updates currently needed. Visually appealing. Property should be maintained normally. Likely has well-kept window displays and highly functioning streetscape amenities (such as a bench, landscaping, etc.)

B – Good condition. Minor repairs would enhance the building, but defects are neither serious nor urgent. Property should be maintained normally. Has some pedestrian-friendly features.

C – Fair condition. Some repairs necessary for safety and/or visual appeal. Defects should be investigated within the next six months. Few pedestrian-friendly features. Upgrades should be considered soon, but not immediately serious.

D – Poor condition. Unlikely to attract visitors due to deficiency of visual appeal. Potentially hazardous to visitors and attention is required in the next month or two. Serious lack of pedestrian-friendly features and visual appeal.

F – Extremely deficient condition. Not visually appealing. Requires urgent repairs and upgrades for safety and for appeal. Needs immediate investigation and attention. No pedestrian-friendly features. Hazardous to visitors.

Streetscape Amenities Condition Grading Scale

A – Excellent condition. Like new, fully functioning, and not in need of any repairs. There are no barriers to pedestrian use. Maintenance should be carried out normally.

B – Good condition. Fully functioning, but may have minor visual flaws. Defects neither serious nor urgent. No extra maintenance required. Maintenance should be maintained normally.

C – Fair condition. Mostly functional. Some repairs necessary for safety and/or visual appeal and should be investigated within the next 6 months.

D – Poor condition. Somewhat functional. Unlikely to be used by pedestrians. Potential safety hazard. Attention is required within the next month or two.

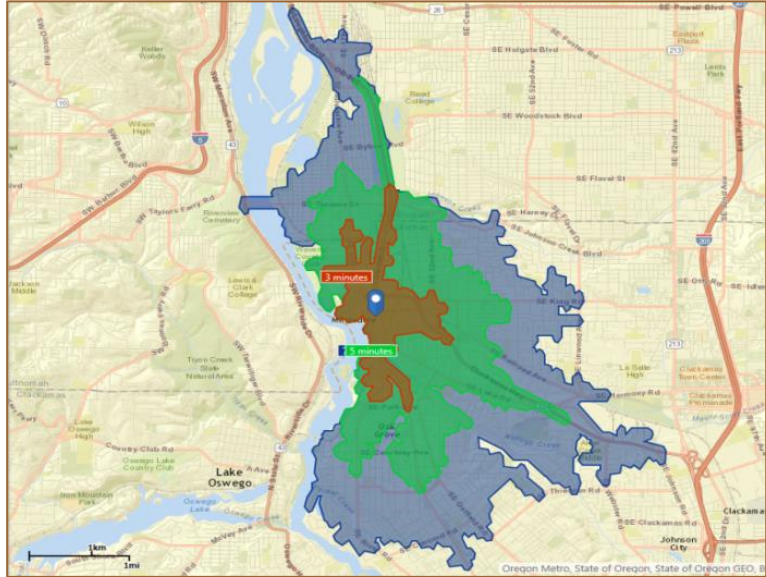
F – Extremely deficient condition. Not functional. Pedestrians are unable to use features. Dangerous to pedestrians. Needs immediate investigation and attention for safety, usefulness, and visual appeal.

Appendix H. Sample Marketing Ad

business opportunities in downtown milwaukie

customer profile

- trade area of over 44,000 people
- employee market of over 21,000 people within a five minute drive
- median household income of over \$52,000



retail potential

- sales leakage of \$18 million or 69,000 square feet

priority businesses

- grocery • food carts • restaurants • clothing store • electronics store



contact

alma flores
community development director
floresa@milwaukieoregon.gov
503-786-7652



max station at the south end of downtown • 3 vacant lots open to development • ready for food carts • farmers market • active business association • 2 schools nearby • newly passed bond issue
visit www.milwaukieoregon.gov for a complete market analysis

Appendix I. Downtown Vacancies

July 2016

Office Spaces



10883 SE Main St. Ste. 201
10883 SE Main St. Ste. 203



Retail Spaces



10554 SE Main St.



10879 SE Main St.



10560 SE Main St.

Lots



Triangle Lot



Cash Lot



City Parking Lot

Appendix J. Priority Recruitment

Customer intercept, business owner, and property owner data was used to compile a list of the top business prospects. While the rankings vary, customers, business owners, and property owners deliver similar message. All three groups listed the following as priorities: grocery store, fresh food market, bakery, bookstore, coffee/sandwich shop, health food store, and clothing store. Two groups listed the following as priorities: hardware store, bike store, and office supply store. Businesses considering relocating downtown should strongly consider filling a niche described below, with extra consideration paid to niches with sales leakage.

Customers Want	Business Owners Want	Property Owners Want
1. Fresh Food Market	1. Grocery Store	1. Grocery Store
2. Grocery Store	2. Clothing Store	2. Bakery
3. Bookstore	3. Coffee/Sandwich Shop	3. Fresh Food Market
4. Bakery	4. Bakery	4. Health Food Store
5. Coffee/Sandwich Shop	5. Bookstore	5. Bike Store
6. Health Food Store	6. Hardware Store	6. Clothing Store
7. Clothing Store	7. Fresh Food Market	7. Coffee/Sandwich Shop
8. Garden Center	8. Health Food Store	8. Pet Supply Store
9. Hardware Store	9. Drug Store	9. Office Supply Store
10. Bike Store	10. Office Supply	10. Bookstore

Top Supportable Businesses by Sales Leakage



Source: City of Milwaukie, Urban Land Institute, and ESRI BAO