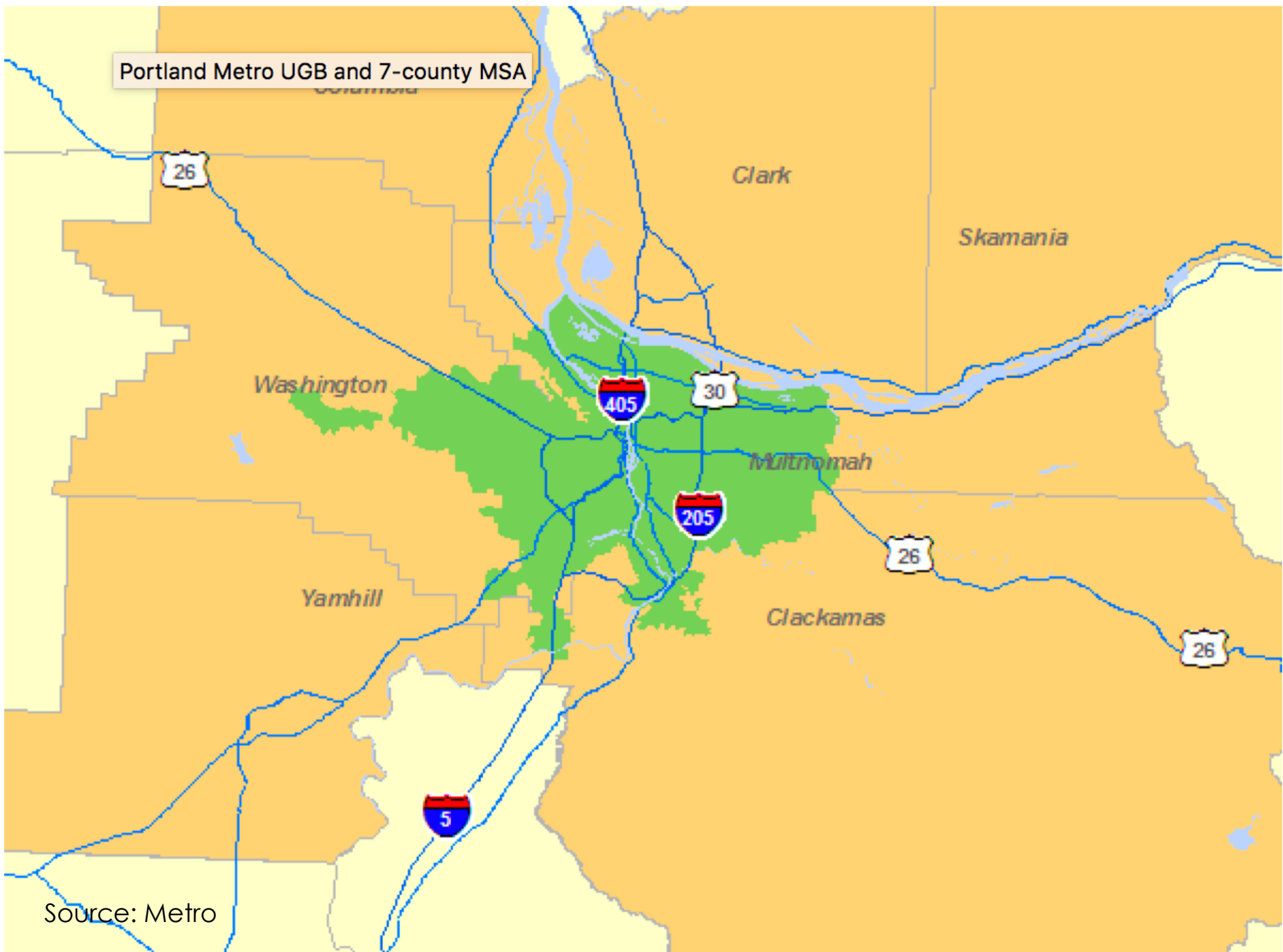




A Tale of 3 Cities: Portland

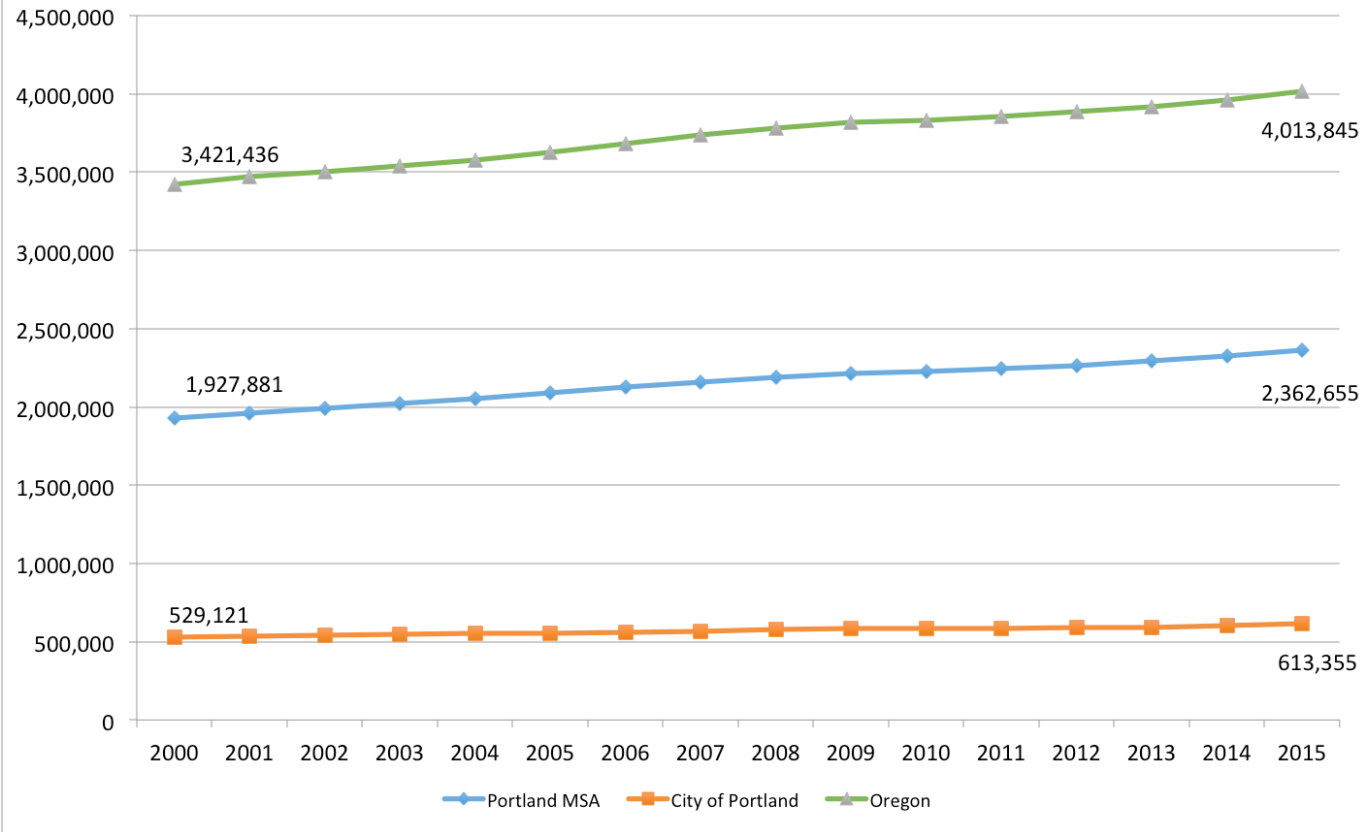
Sheila Martin,
Director, Institute of Portland Metropolitan
Studies/
Population Research Center

Portland Metro UGB and 7-county MSA



Source: Metro

Population 2000 - 2015



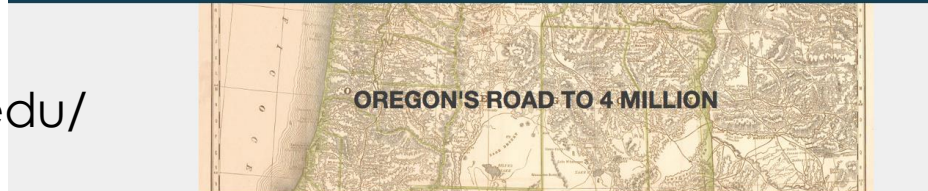
Portland MSA = 60% state's population

Portland = 25% MSA population; 40% of MSA jobs

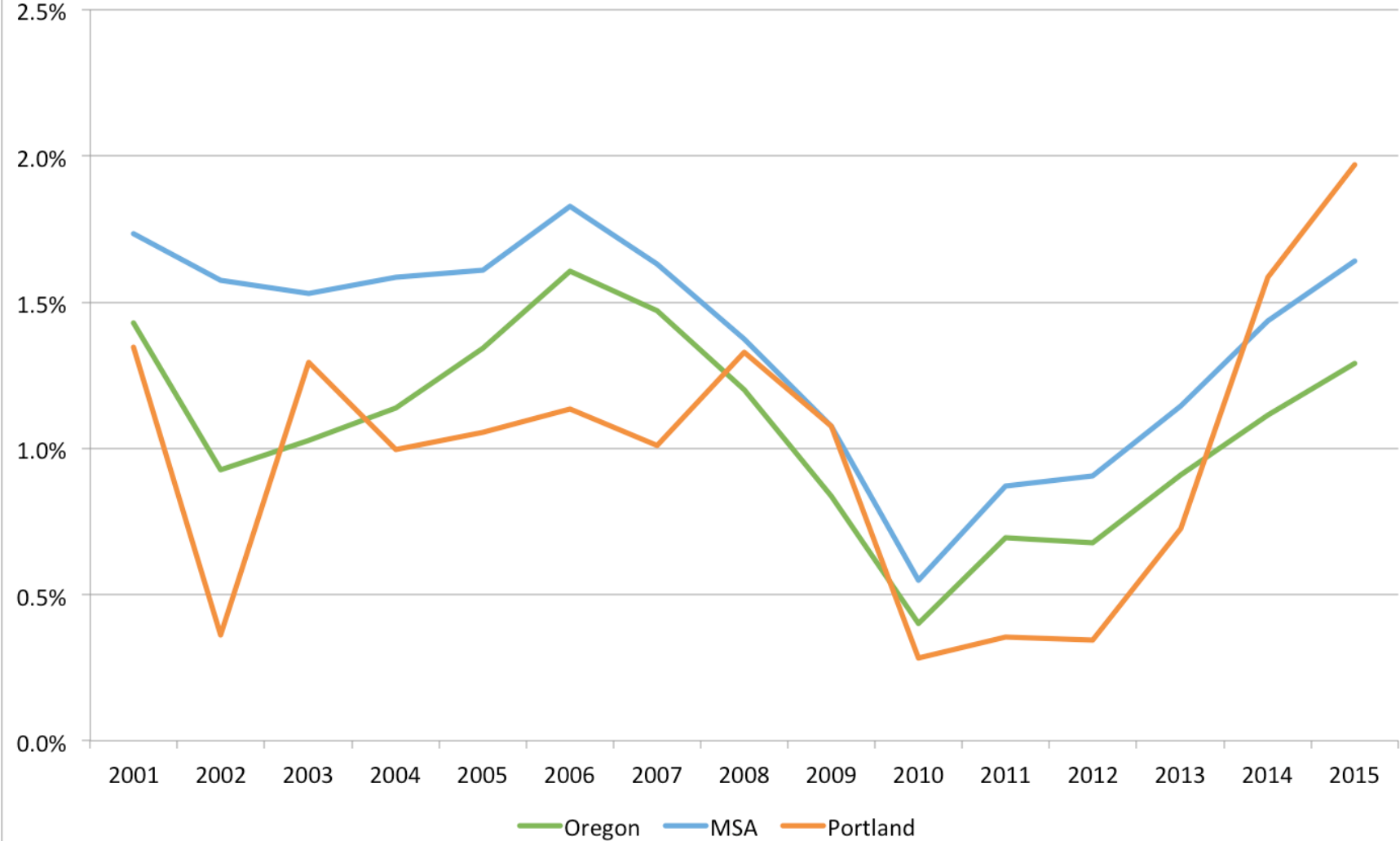
Source: Population Research Center, Portland State University



<http://roadto4million.research.pdx.edu/>



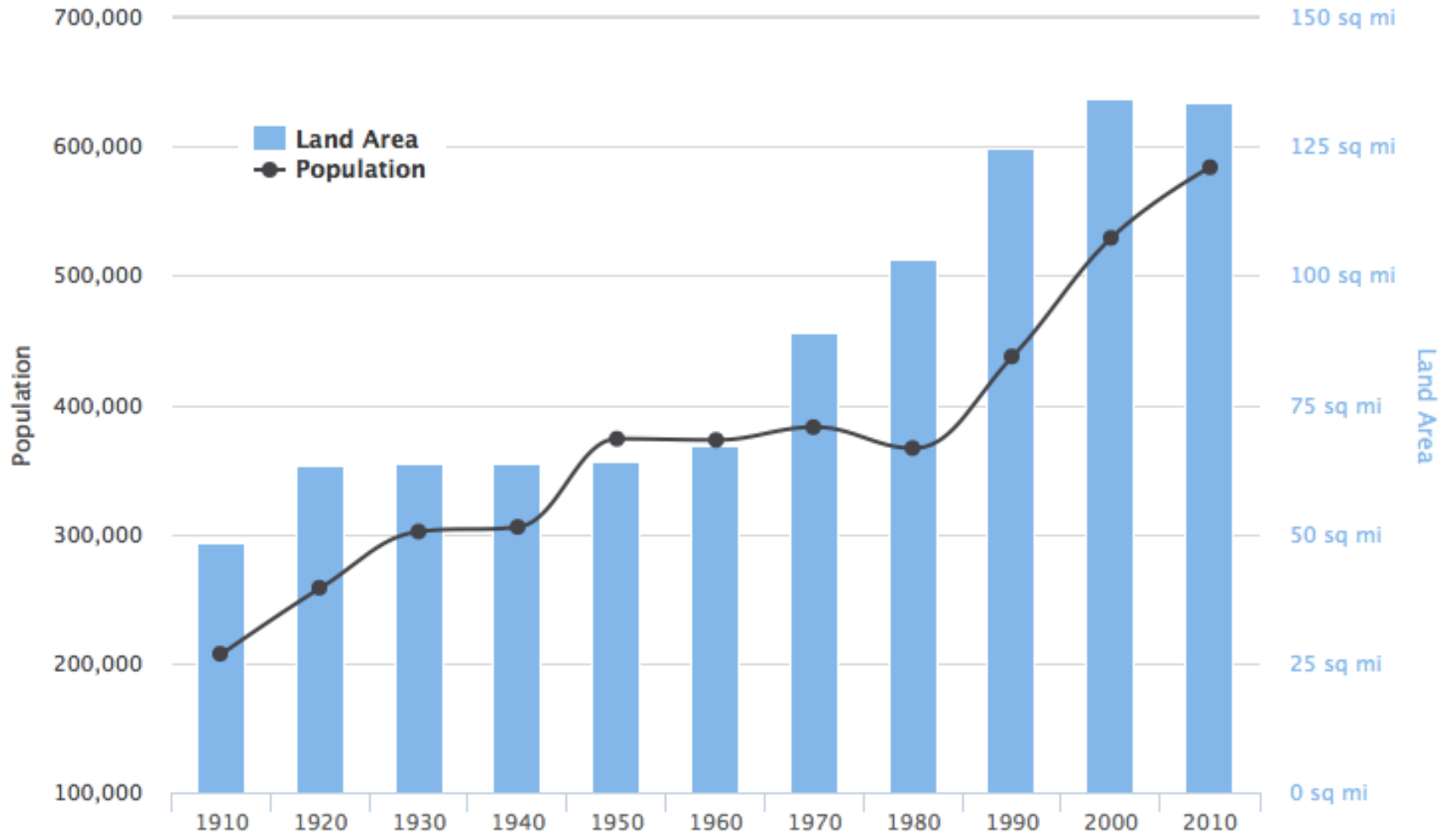
Annual Population Growth Rate, 2000 to 2015



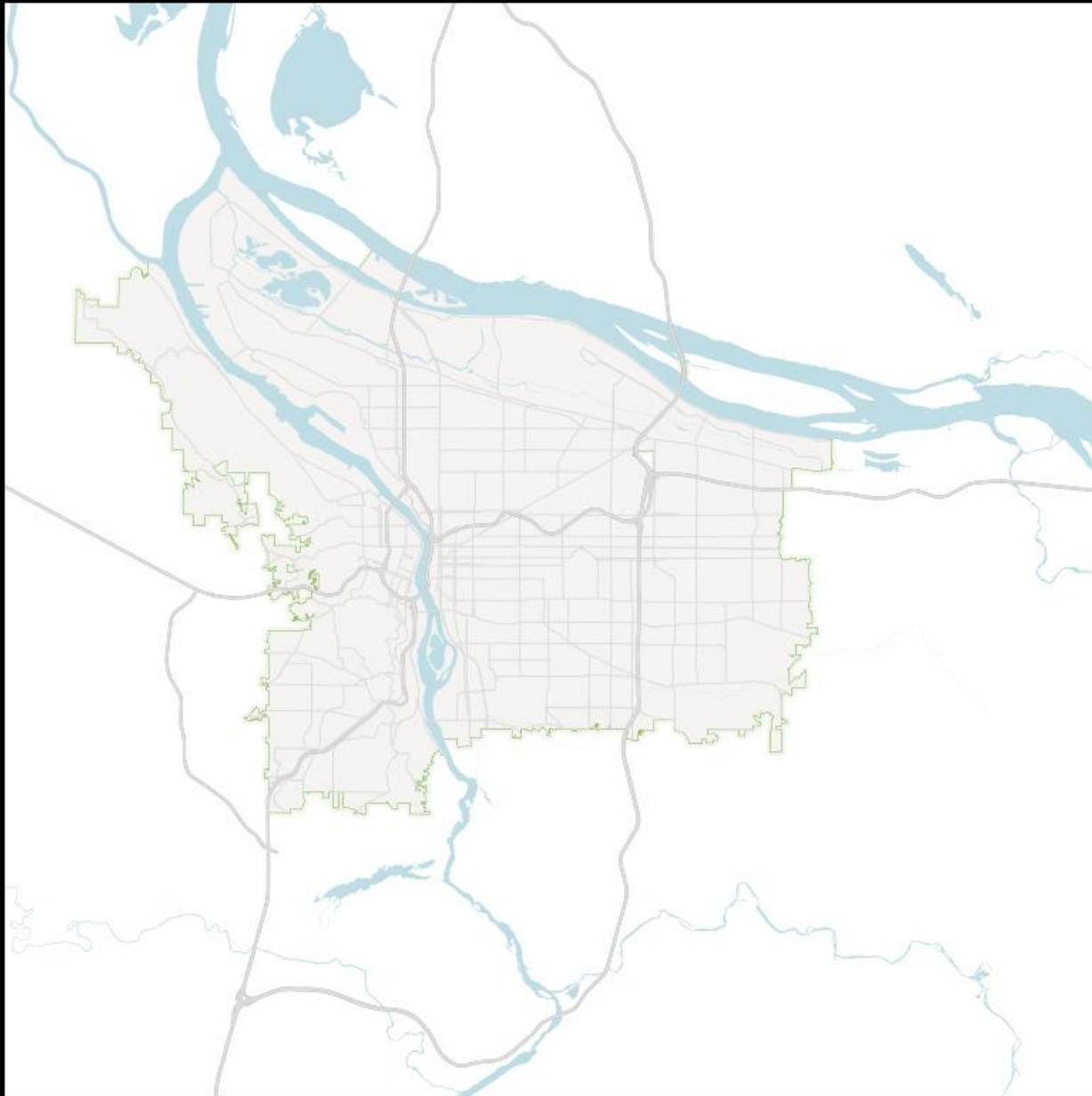
Source: Population Research Center, Portland State University

The City of Portland: Population and Land Area, 1910 to 2010

Source: US Census



Highcharts.com

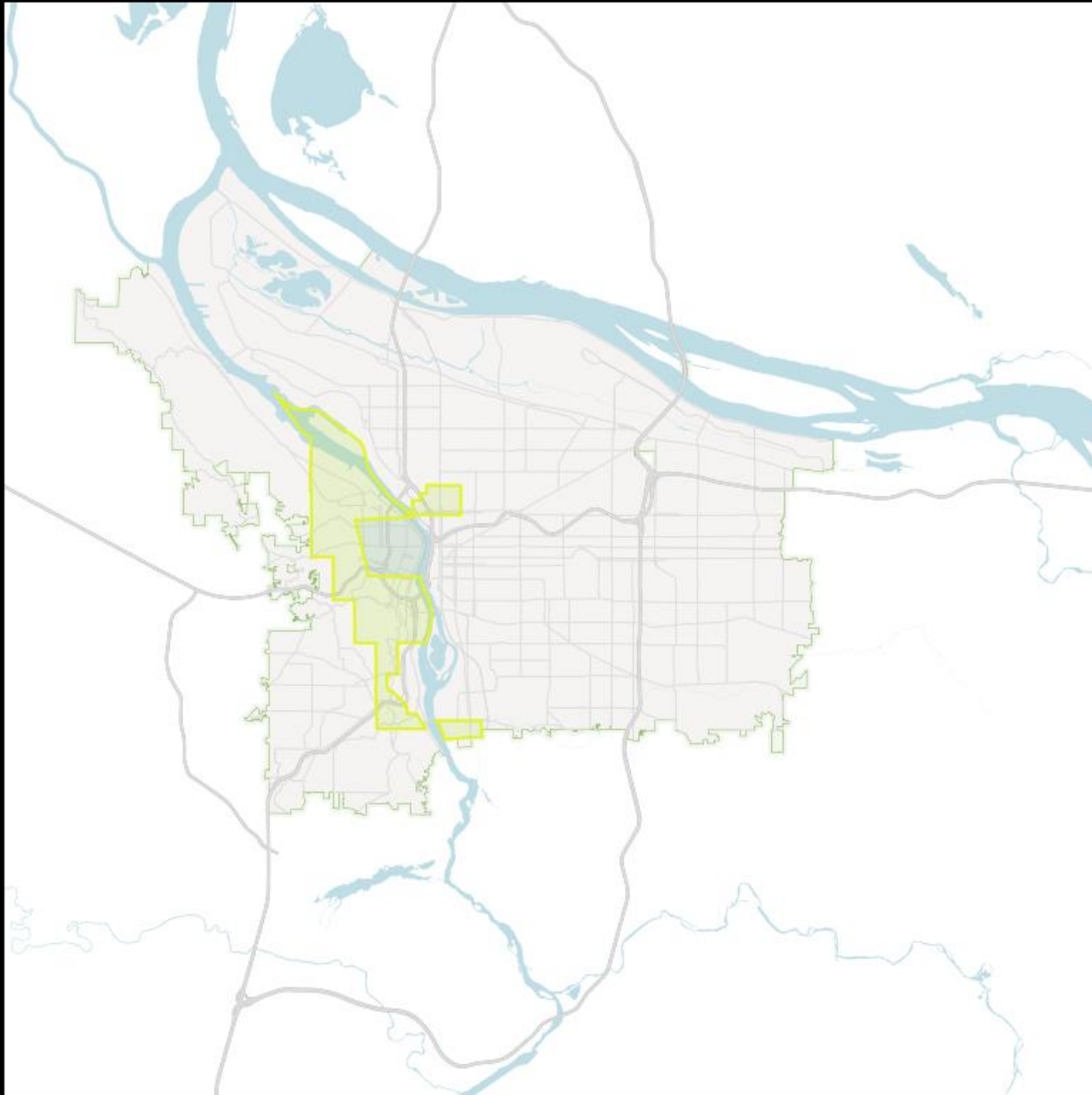


Portland Boundary

- Historic Annexation
- Contemporary Boundary

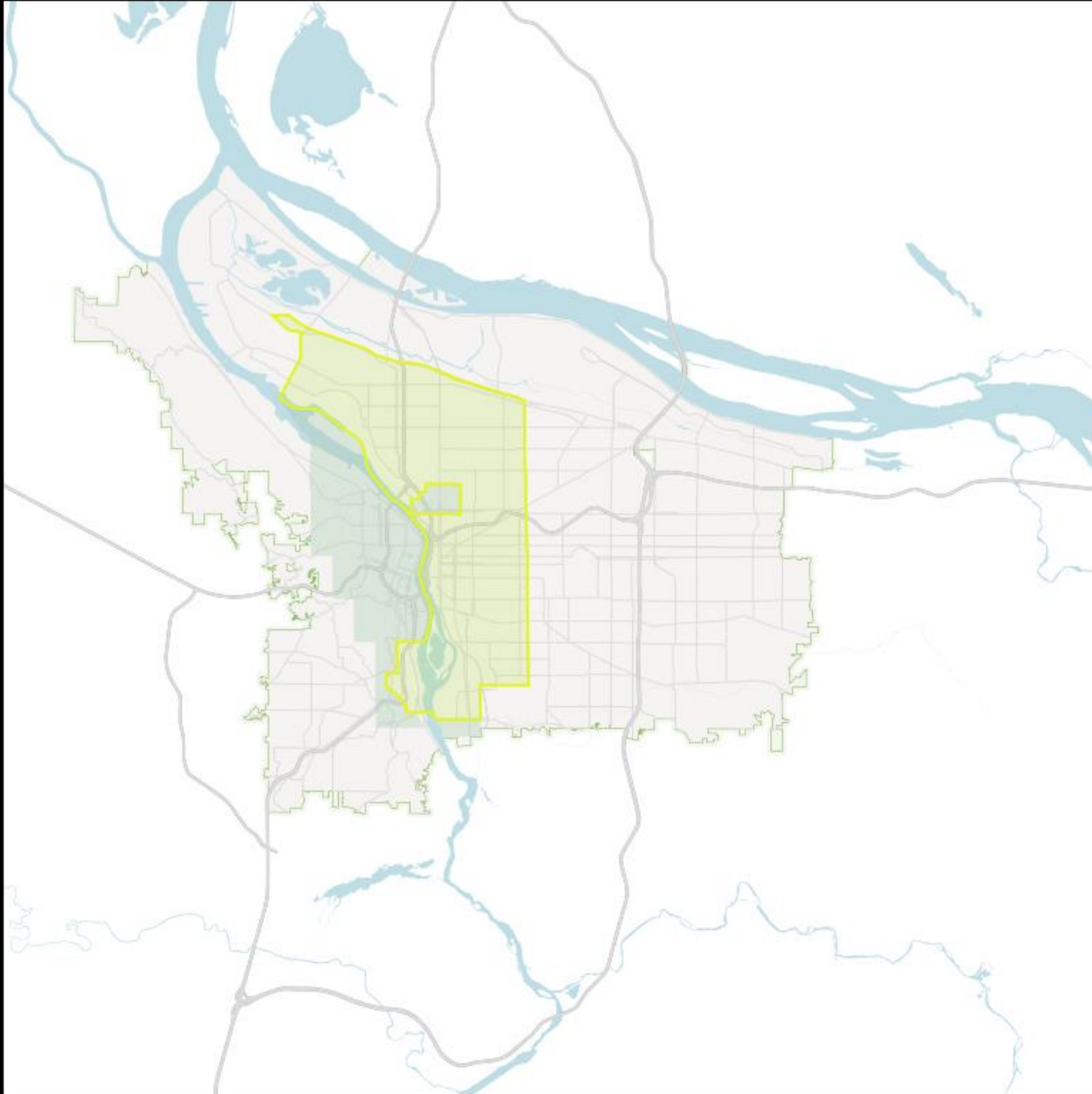


Portland Boundary
Historic Annexation
Contemporary Boundary



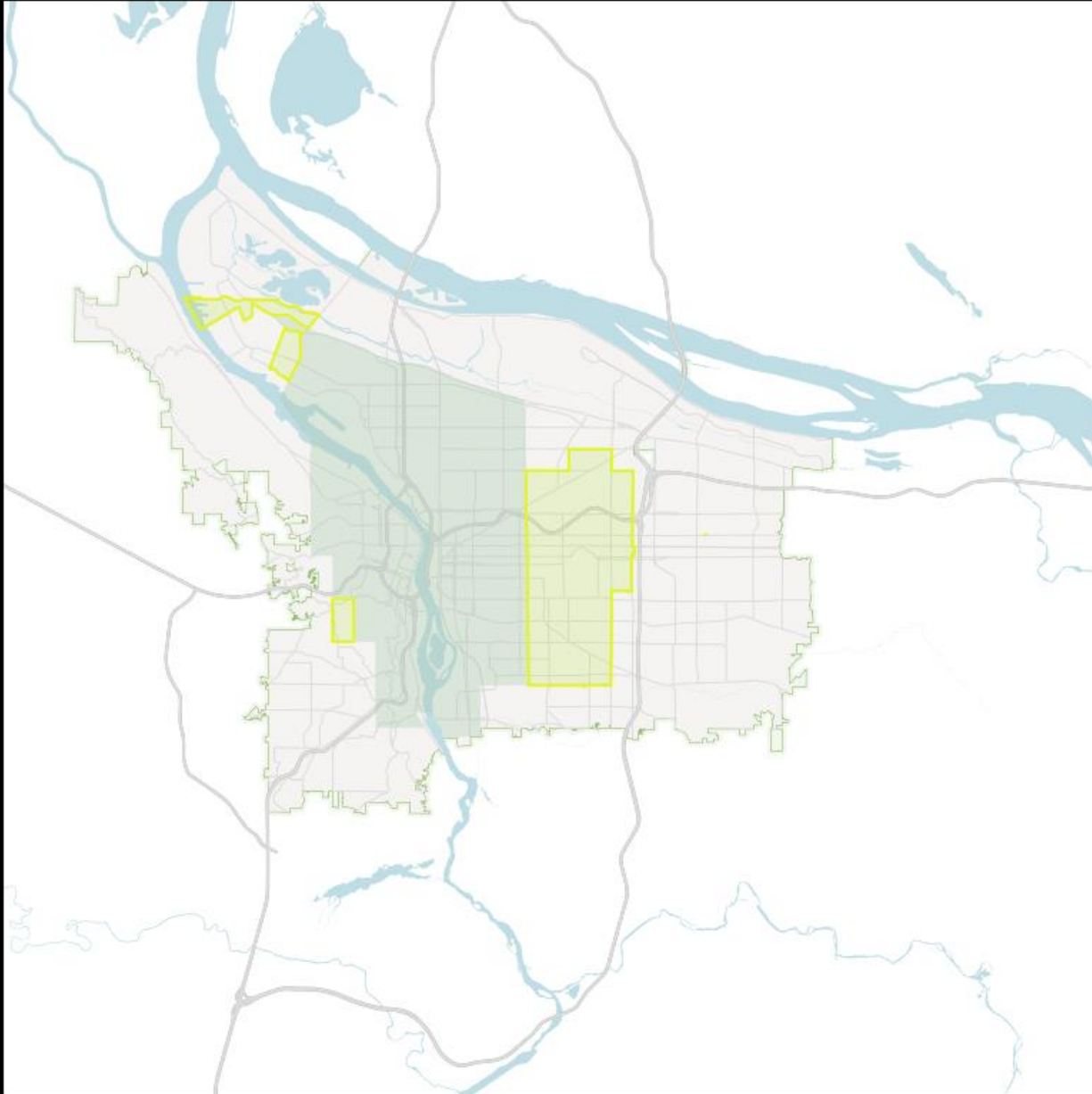
Portland Boundary

- Historic Annexation
- Contemporary Boundary

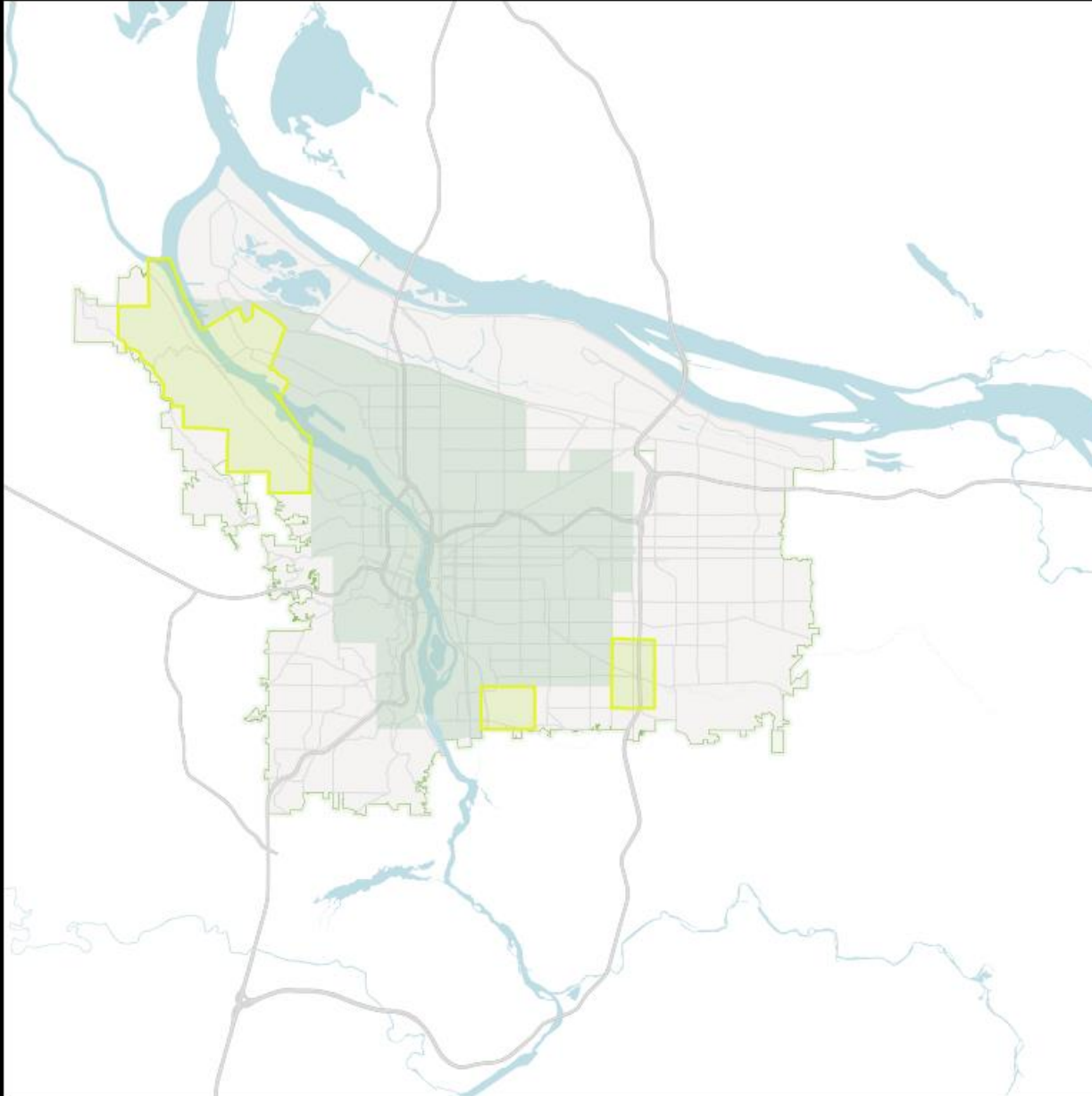


Portland Boundary

- Historic Annexation
- Contemporary Boundary

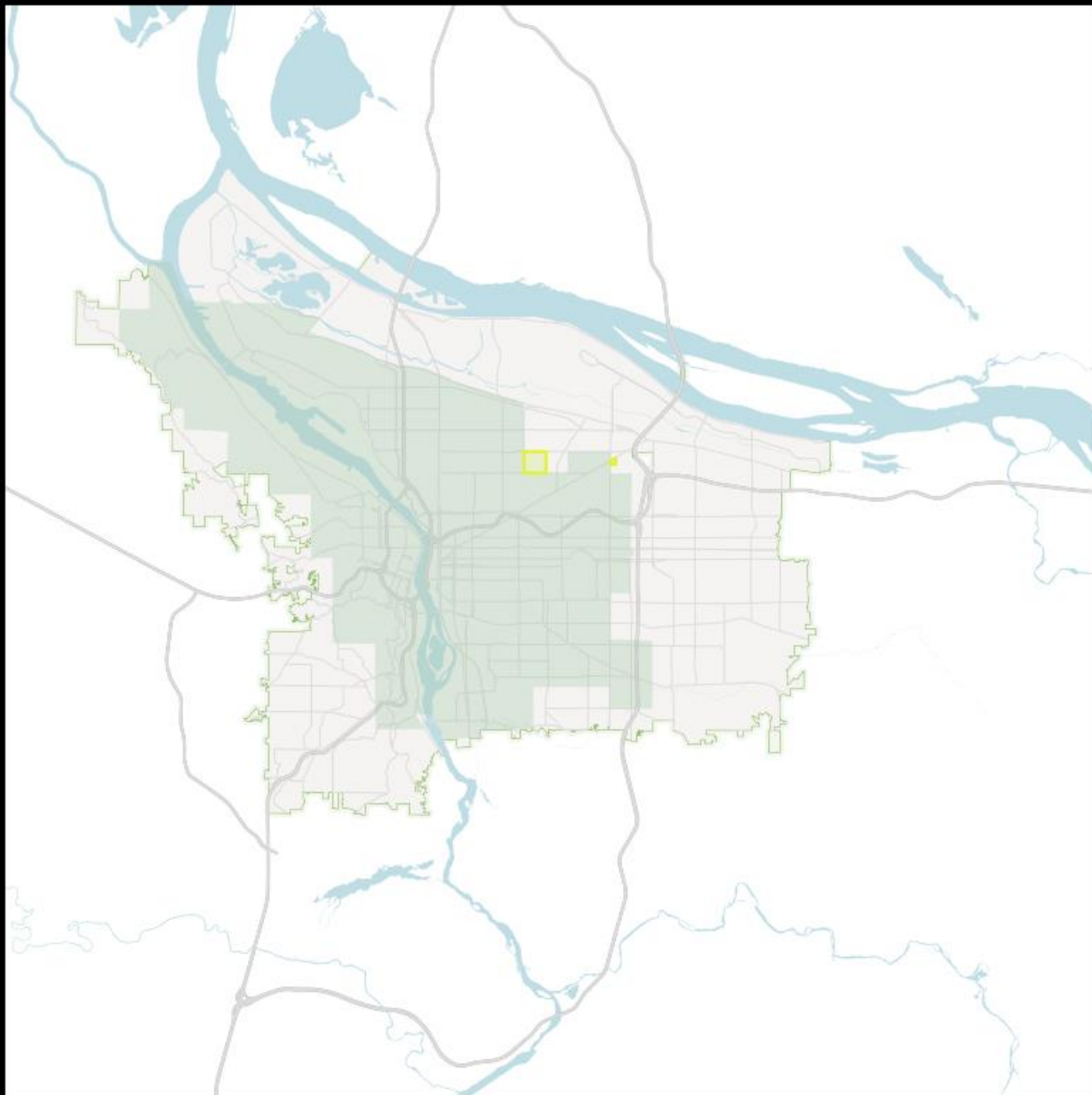


Portland Boundary
Historic Annexation
Contemporary Boundary

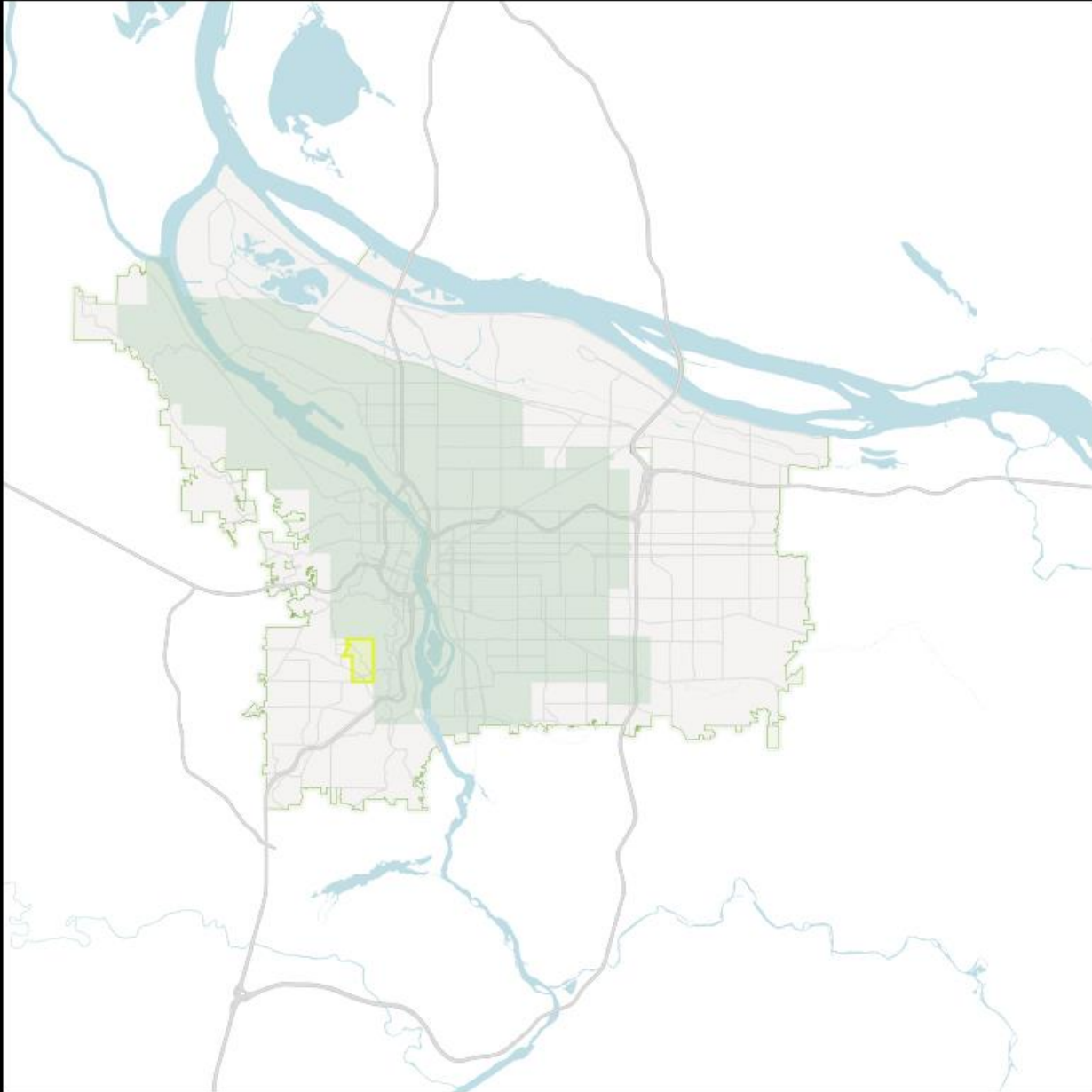


Portland Boundary

- Historic Annexation
- Contemporary Boundary

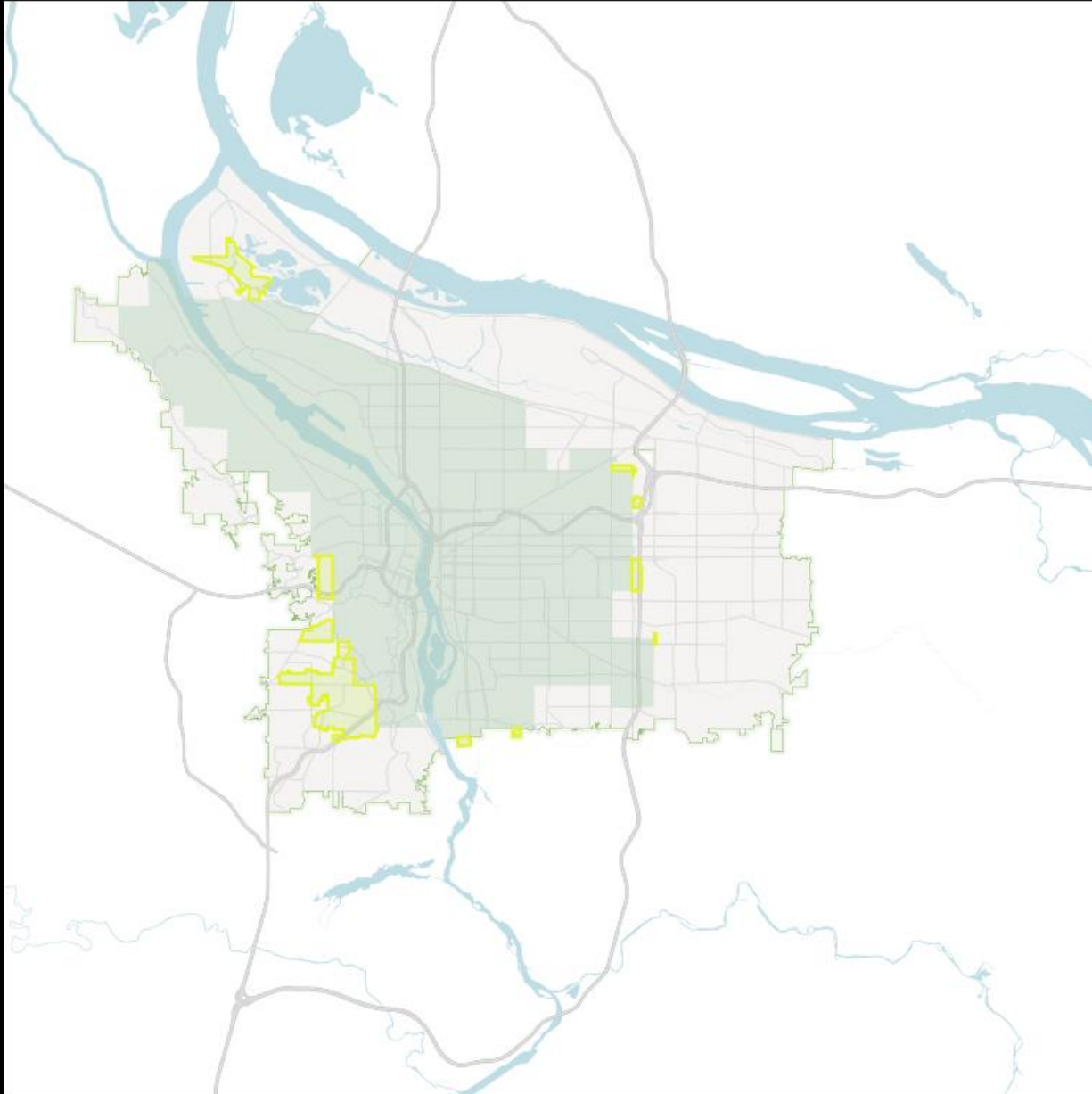


Portland Boundary
Historic Annexation
Contemporary Boundary

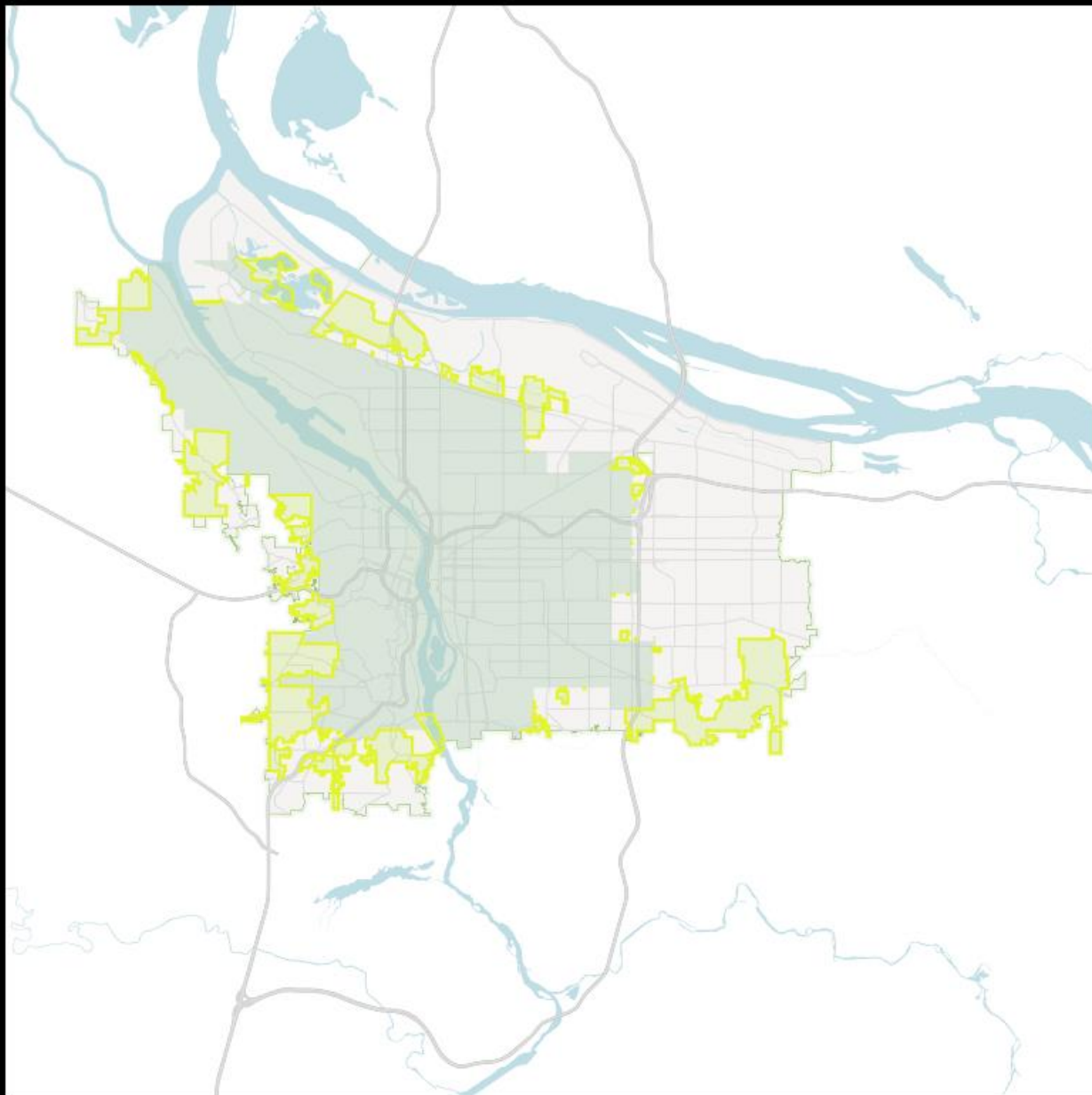


Portland Boundary

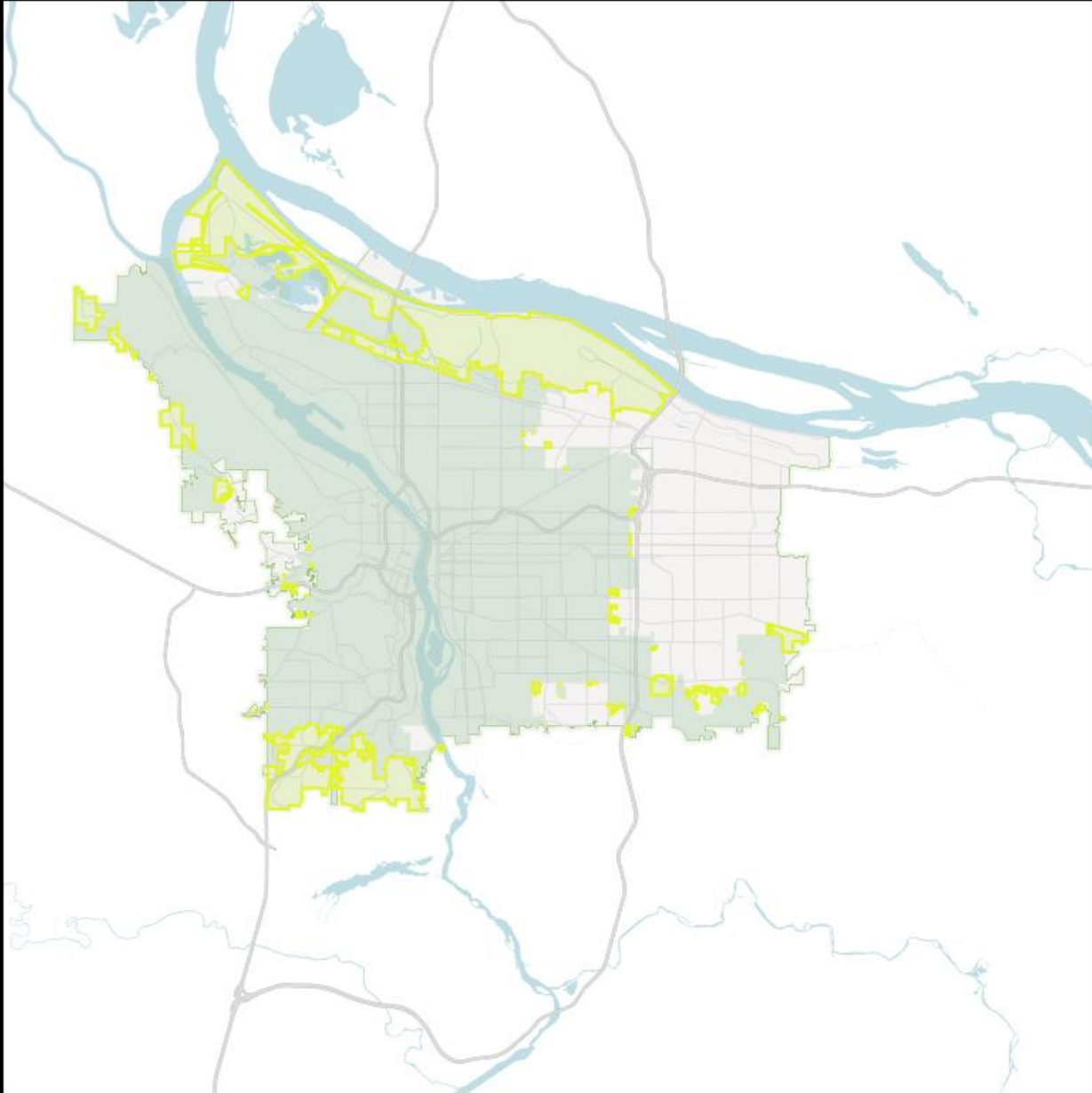
- Historic Annexation
- Contemporary Boundary



Portland Boundary
Historic Annexation
Contemporary Boundary

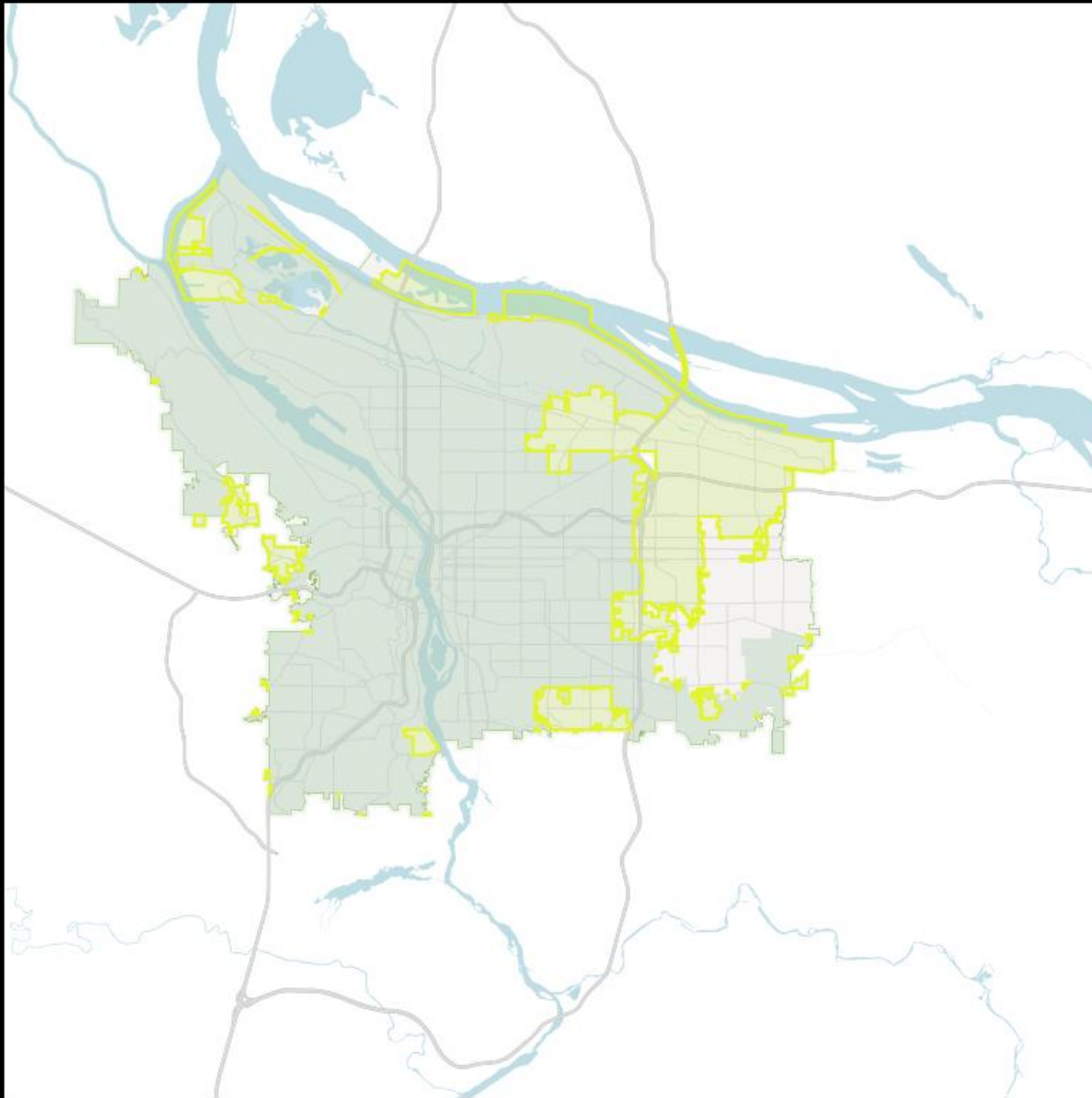


Portland Boundary
Historic Annexation
Contemporary Boundary

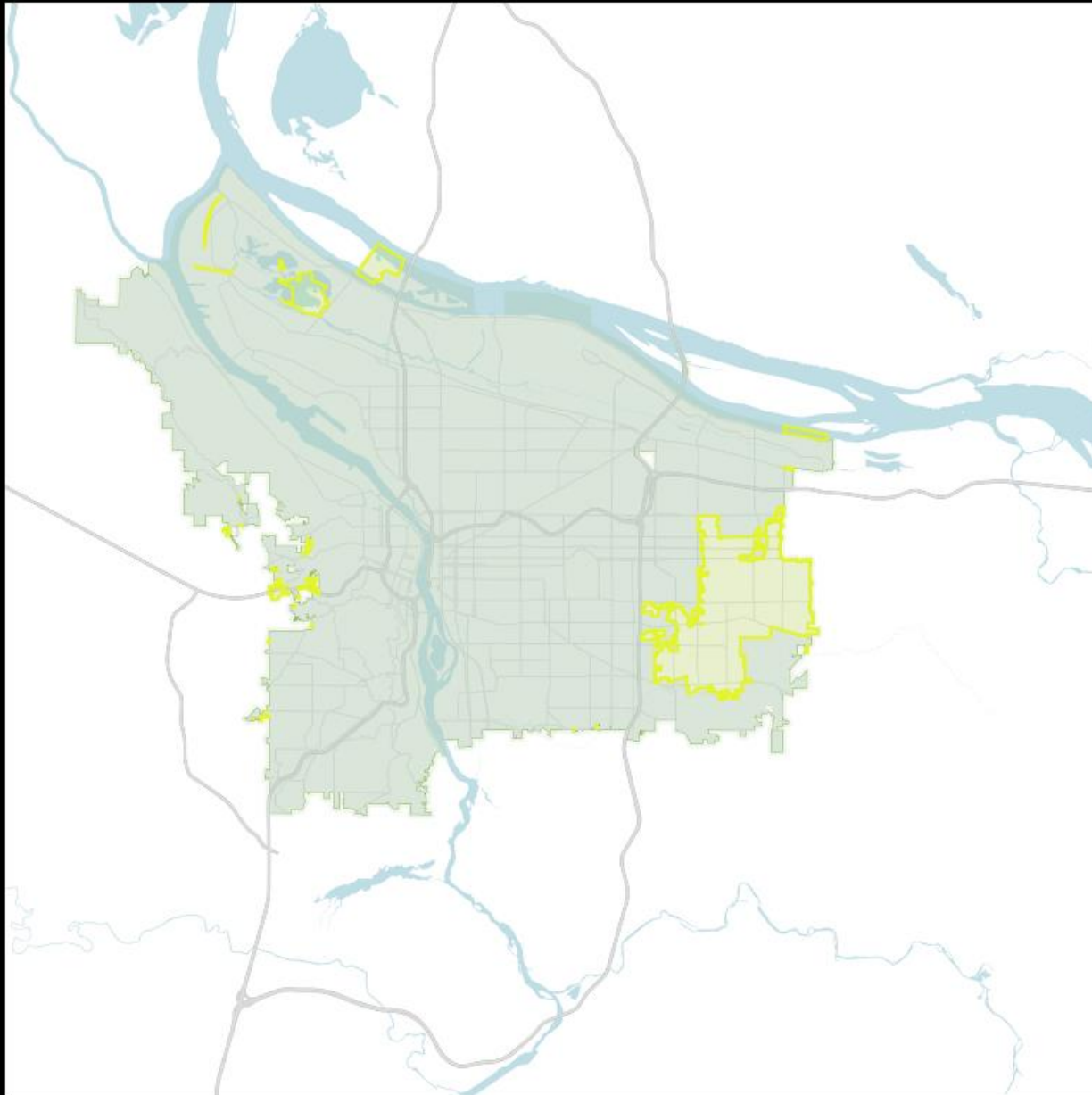


Portland Boundary

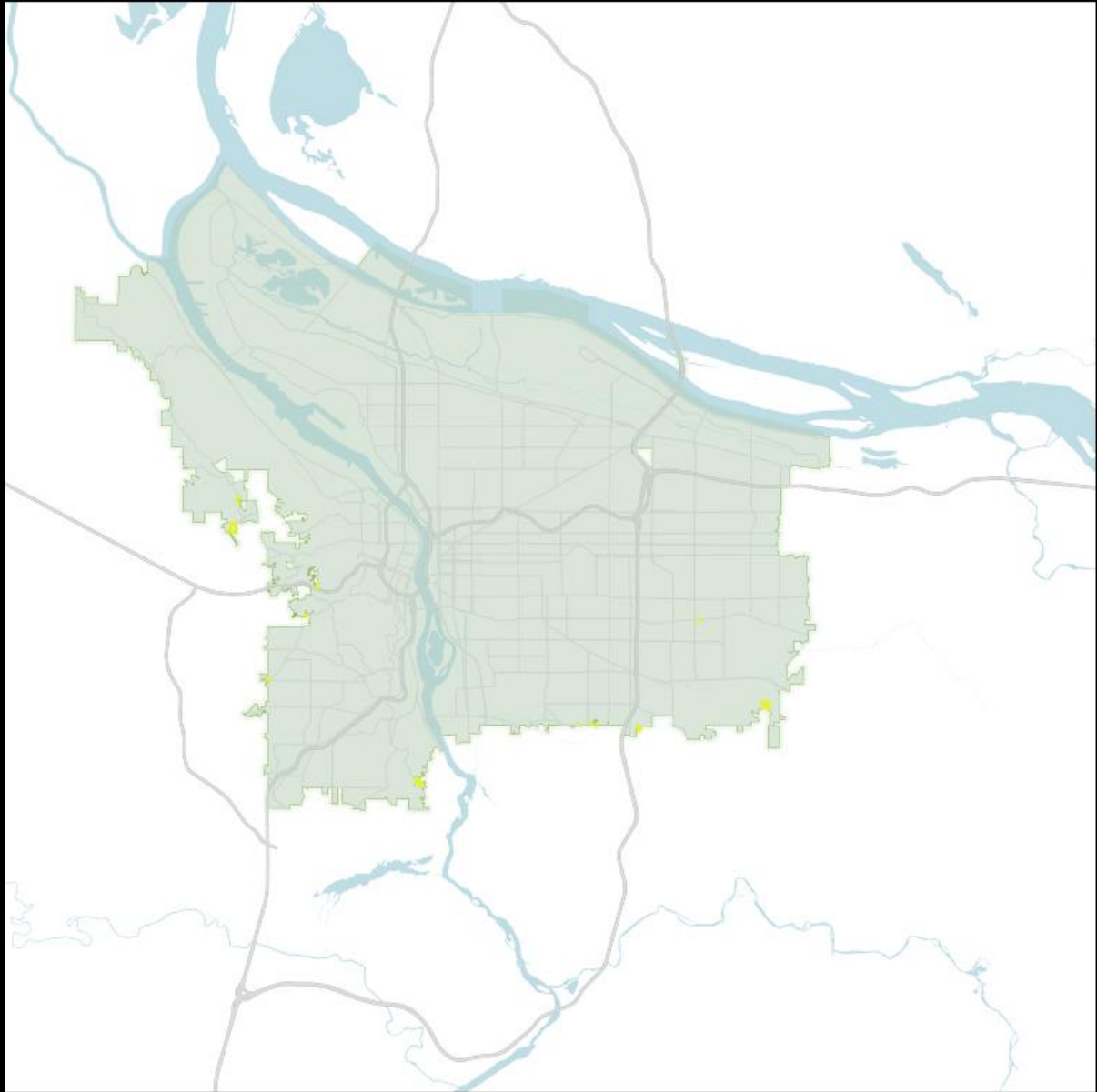
- Historic Annexation
- Contemporary Boundary



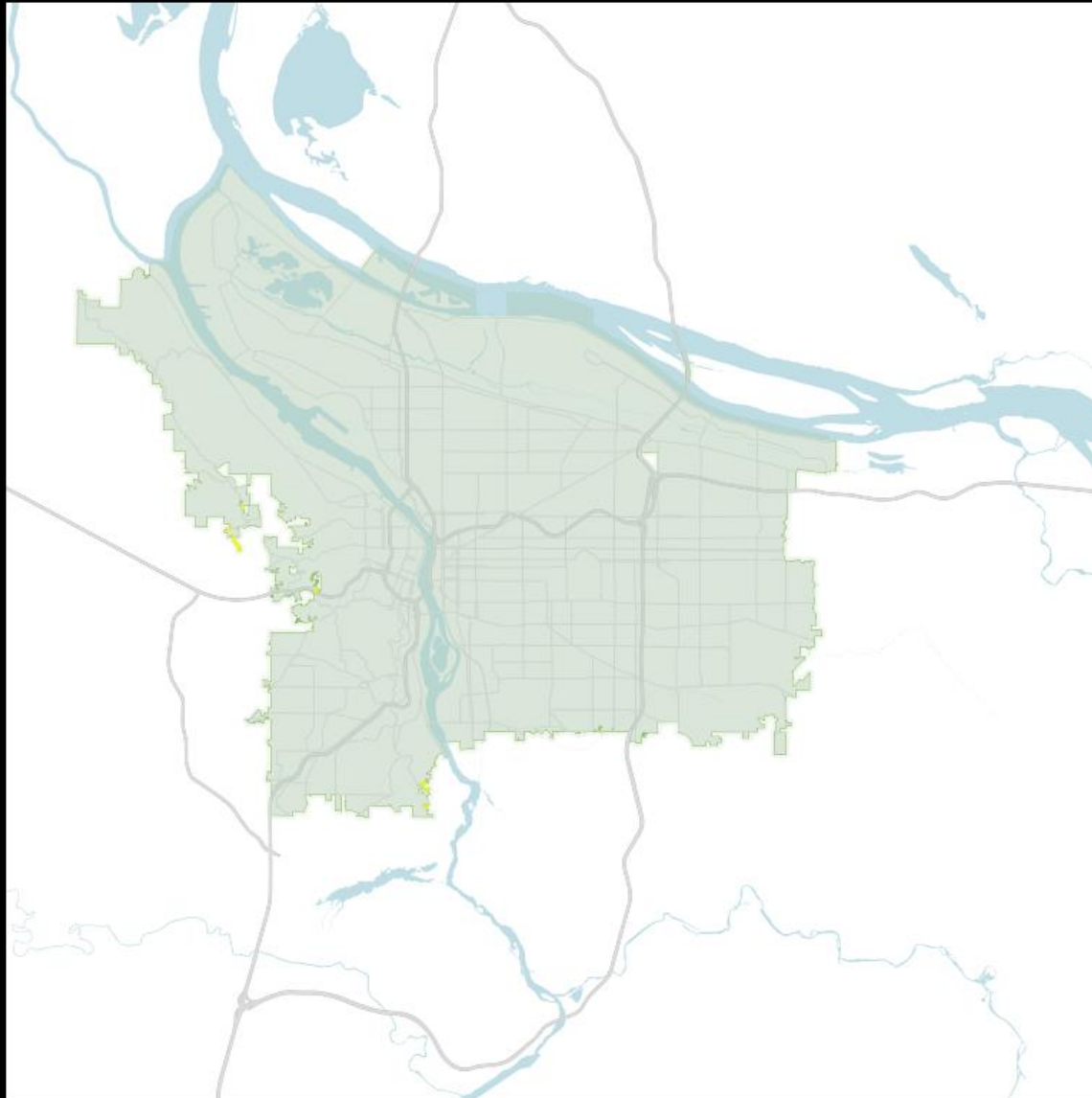
Portland Boundary
Historic Annexation
Contemporary Boundary



Portland Boundary
Historic Annexation
Contemporary Boundary



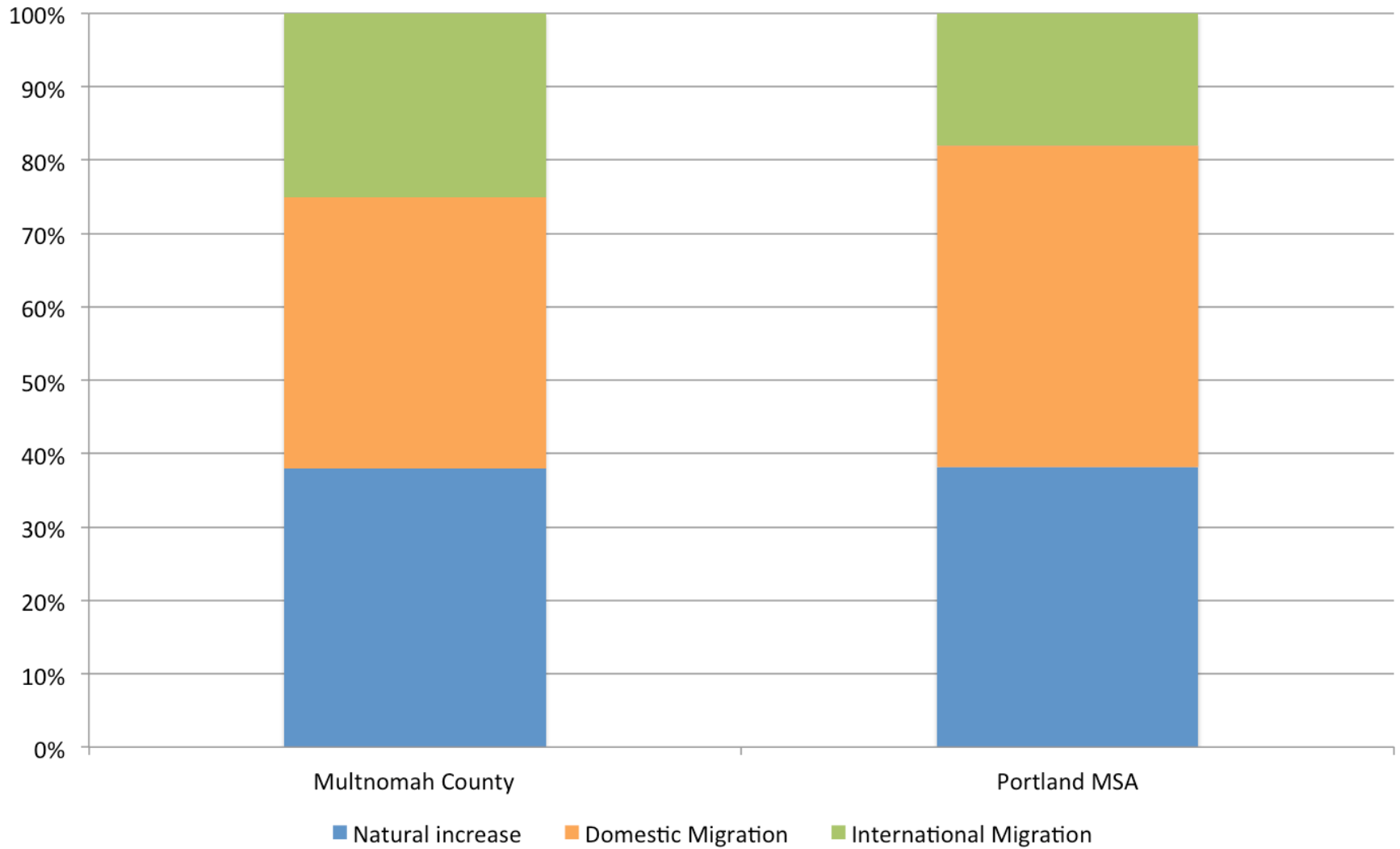
Portland Boundary
Historic Annexation
Contemporary Boundary



Portland Boundary
Historic Annexation
Contemporary Boundary

tland21/growing-portland/2010

Components of Population Change, 2010 to 2015

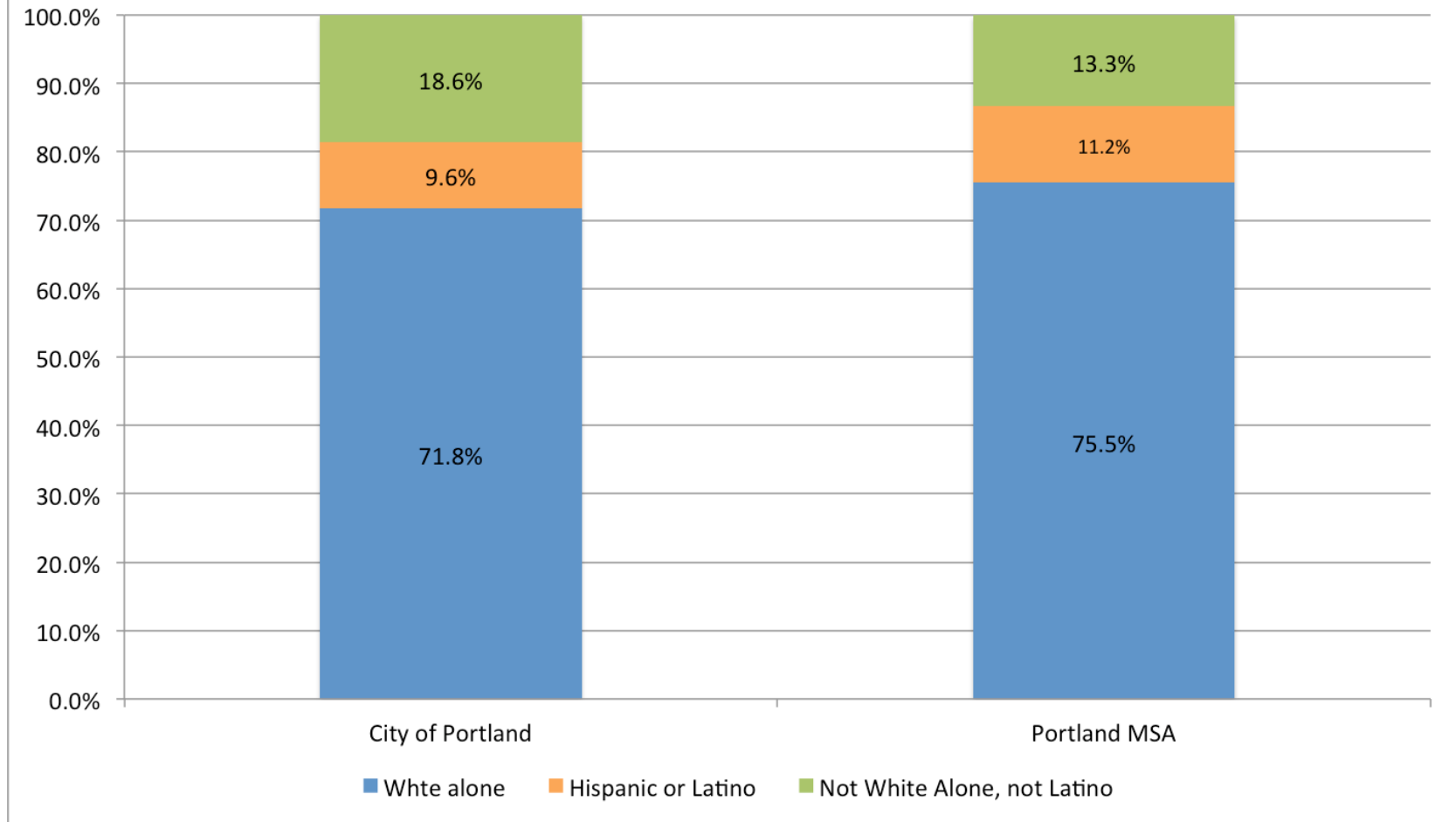


Source: U.S. Census, 2015 Population Estimates, Table PEPTCOMP

Demographic Trends Influencing Housing Demand

- Population: Aging
- Fertility Rates: Declining
- Marriage and Childbearing: Later or not at all
- Immigration: Slowing
- Household size: Declining

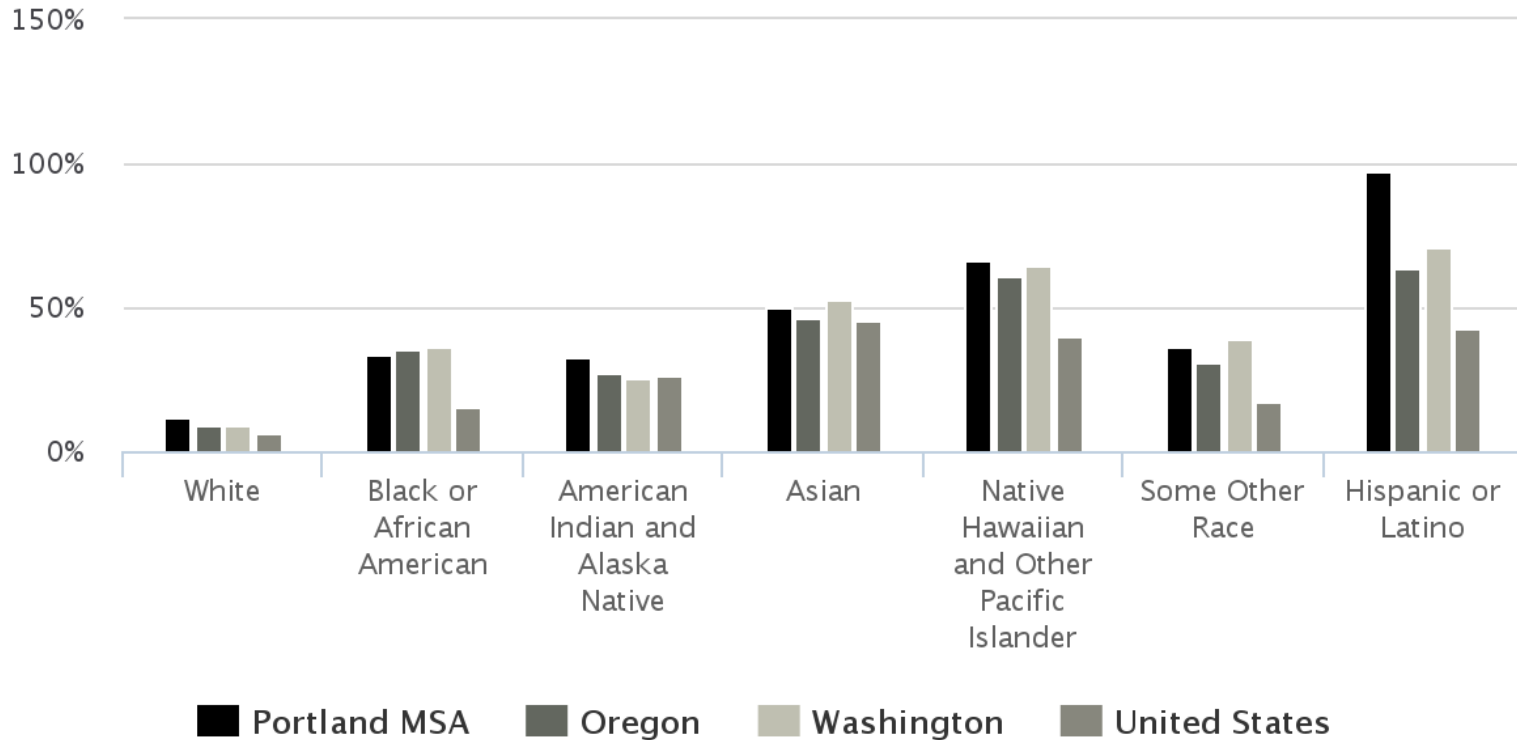
Race and Ethnicity, City of Portland and Portland MSA 2010-2014



Source: U.S. Census, American Community Survey, 2010-2014 5-year estimates, Table DP-05

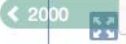
Change in population by race (alone or in combination with one or more races) and Hispanic origin, Portland MSA, 2000–2010

Source: US Census, Table QT-P5,P4,QT-P9



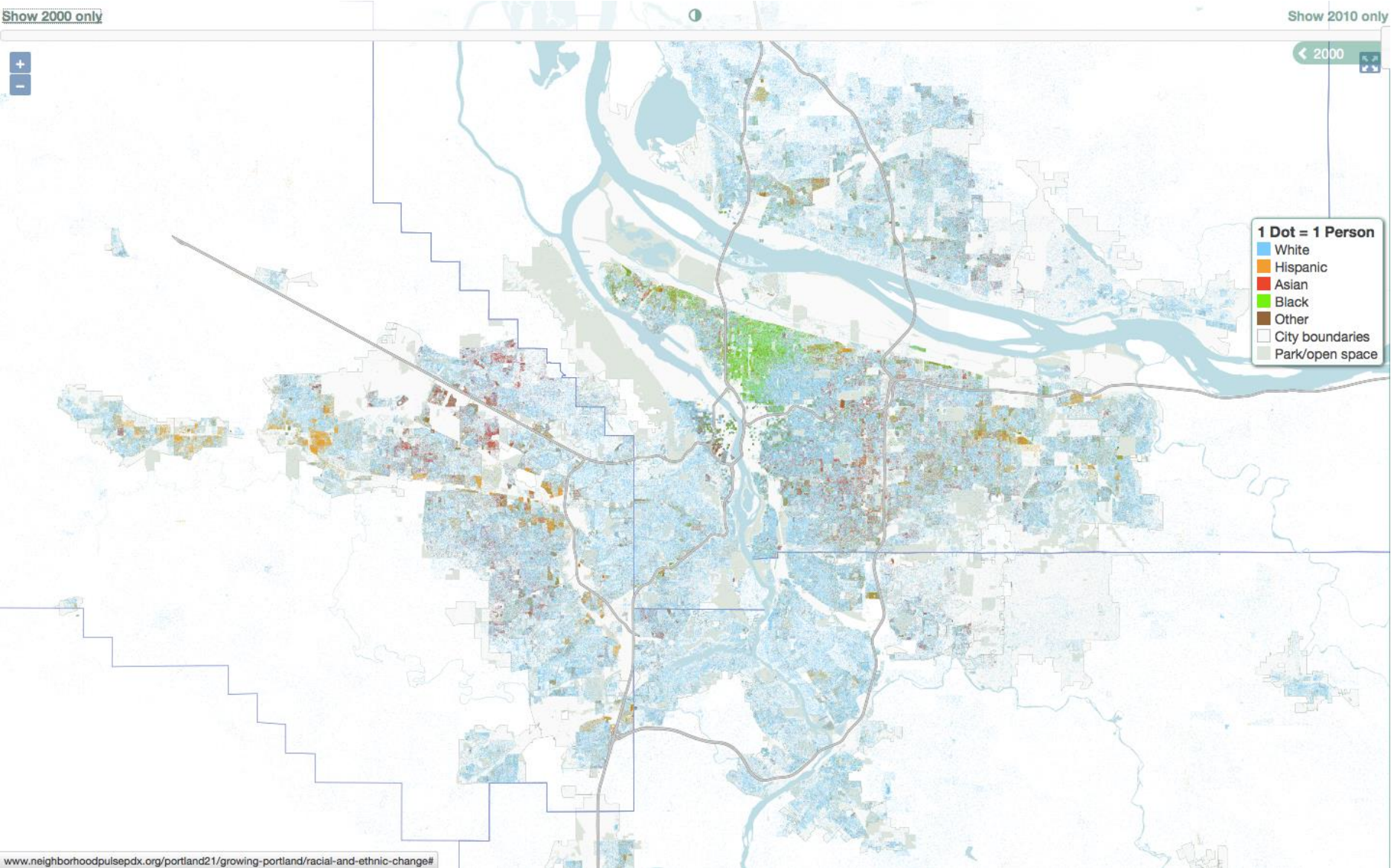
Show 2000 only

Show 2010 only



1 Dot = 1 Person

- White
- Hispanic
- Asian
- Black
- Other
- City boundaries
- Park/open space



www.neighborhoodpulsepdx.org/portland21/growing-portland/racial-and-ethnic-change#

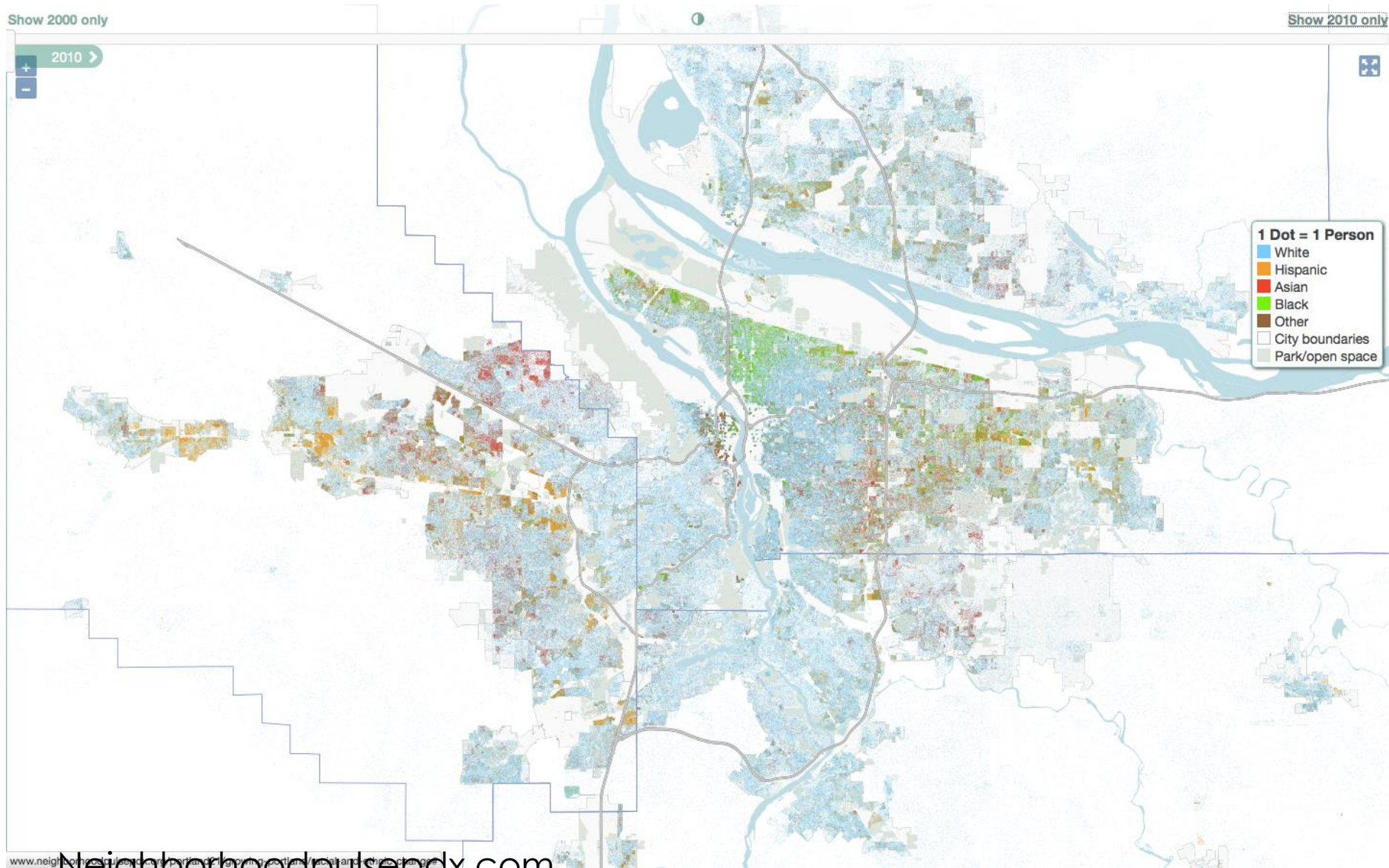
Show 2000 only

Show 2010 only

2010 >



- 1 Dot = 1 Person**
- White
 - Hispanic
 - Asian
 - Black
 - Other
 - City boundaries
 - Park/open space

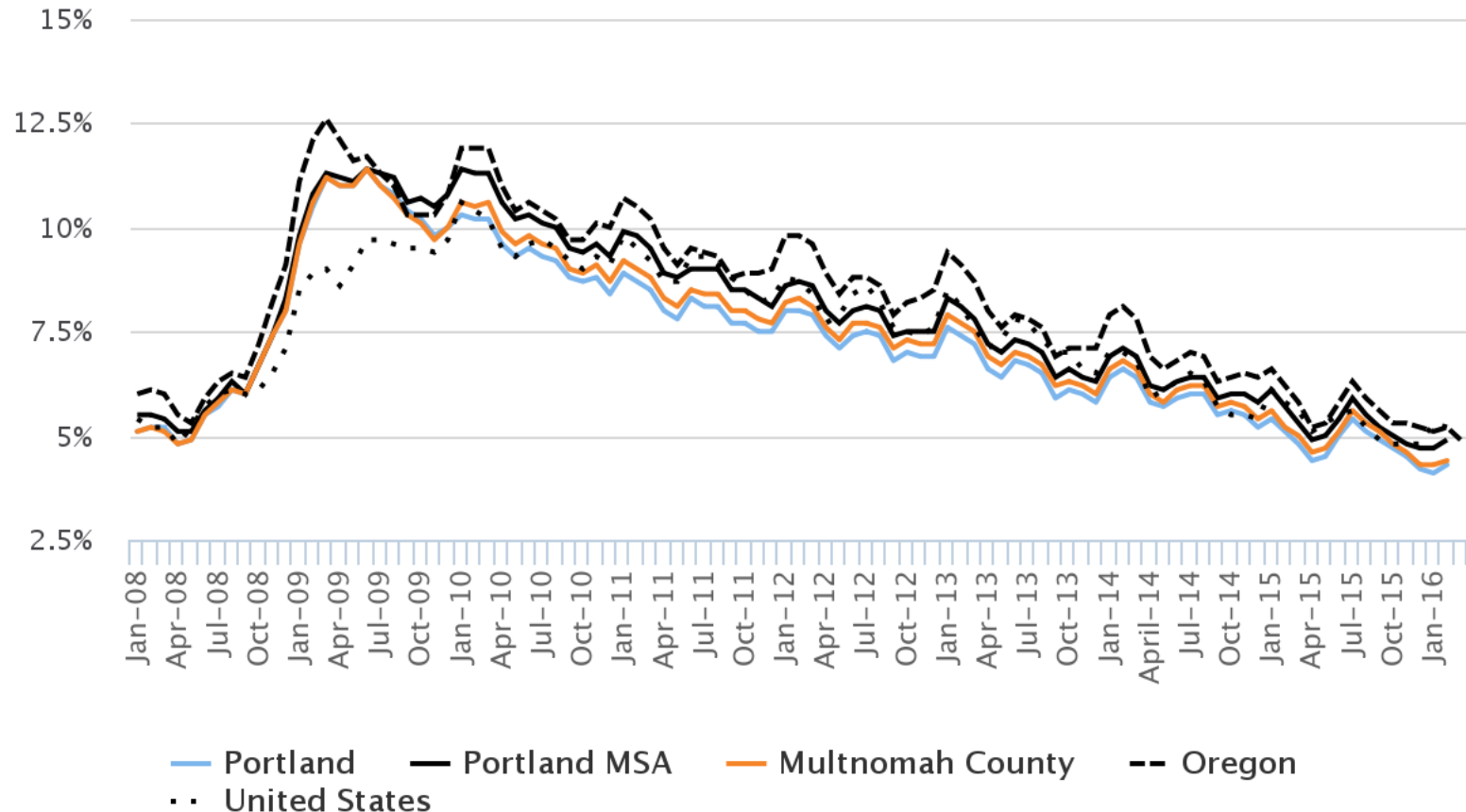


Economic Recovery

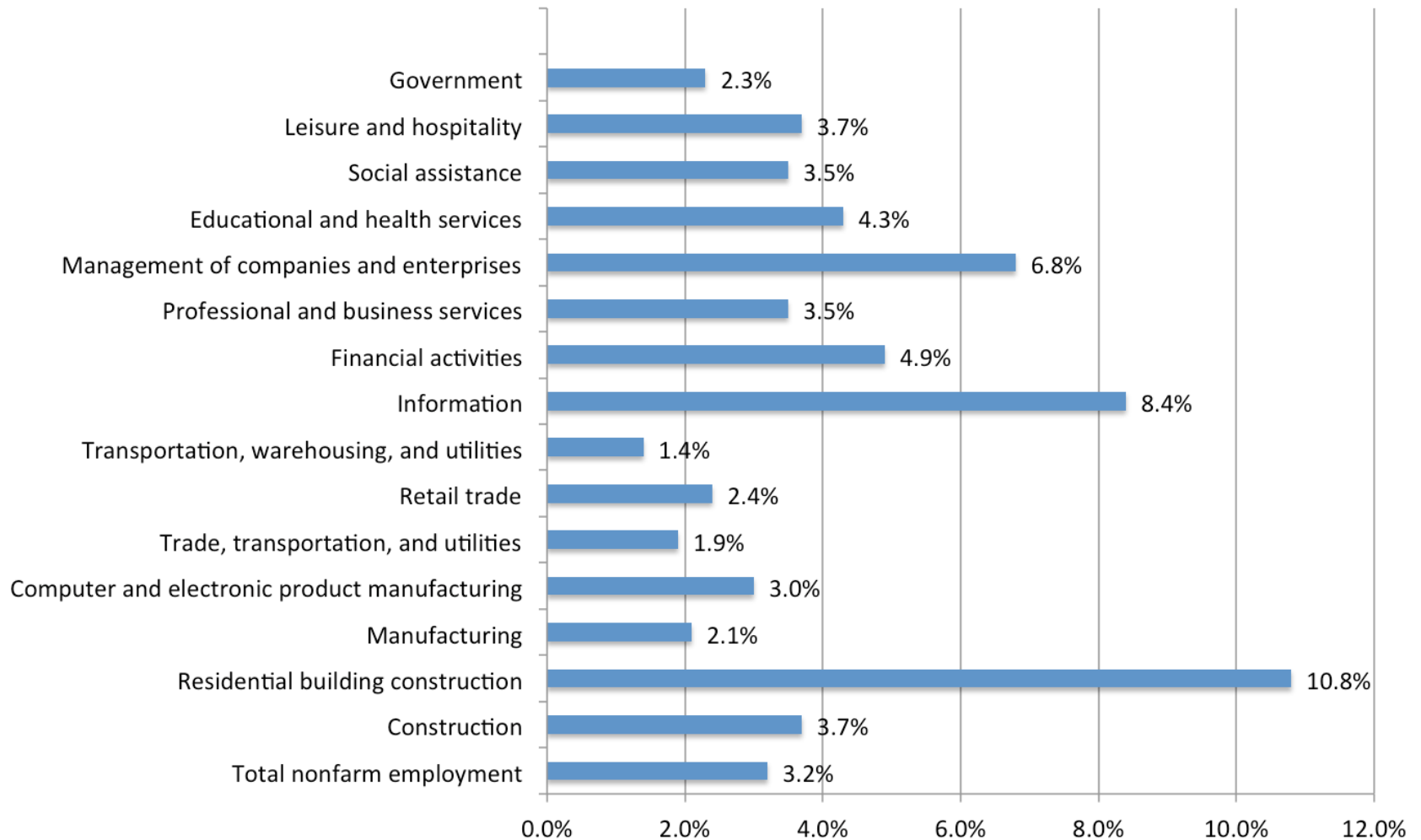
Winners and losers?

Unemployment, Portland MSA, 2008-2016

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics



Year-over Year Change in employment by Industry, Portland MSA, March 2015 to March 2016

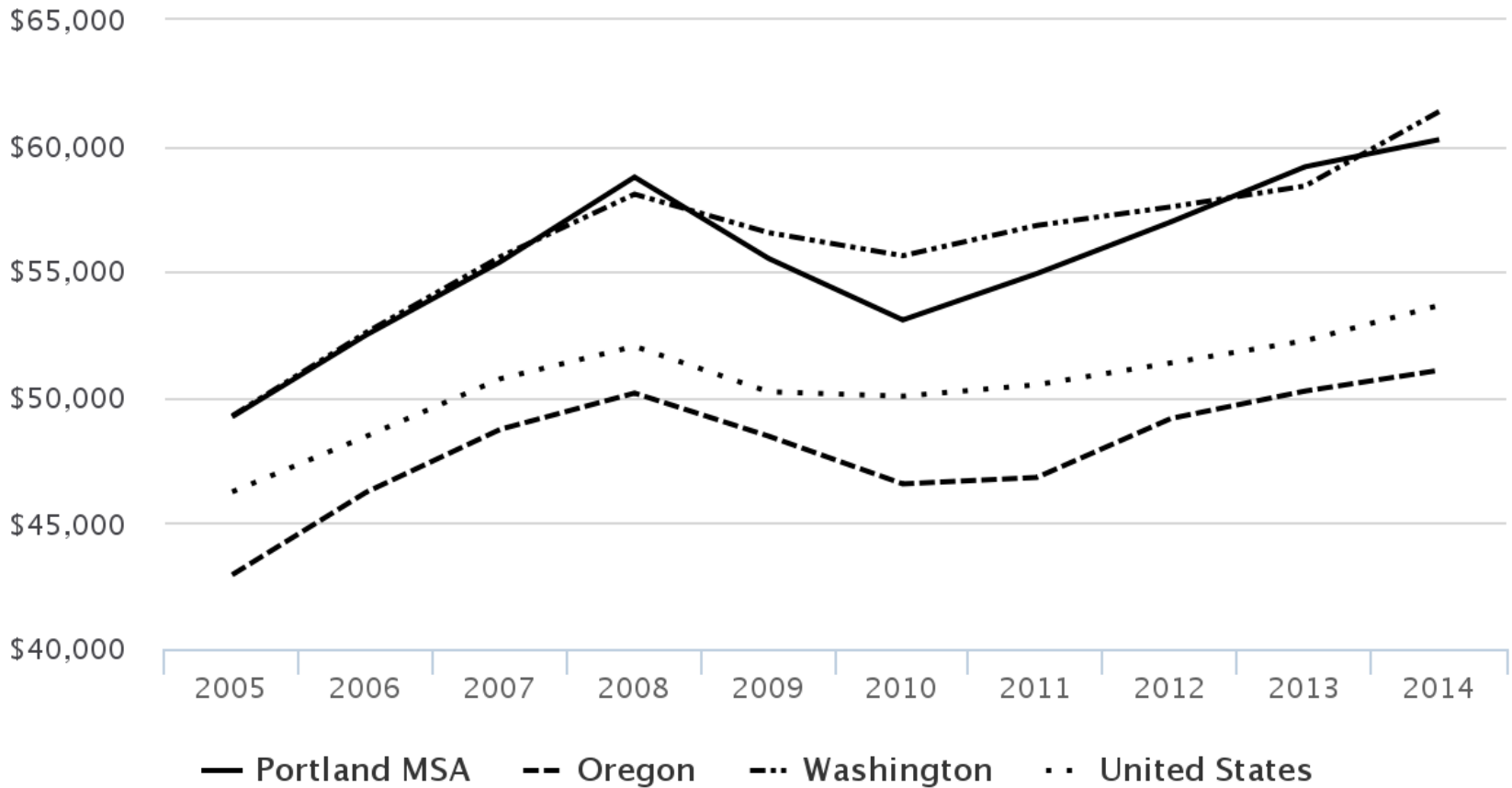


Source: Oregon Employment Department, Current Employment Statistics. Not Seasonally Adjusted.



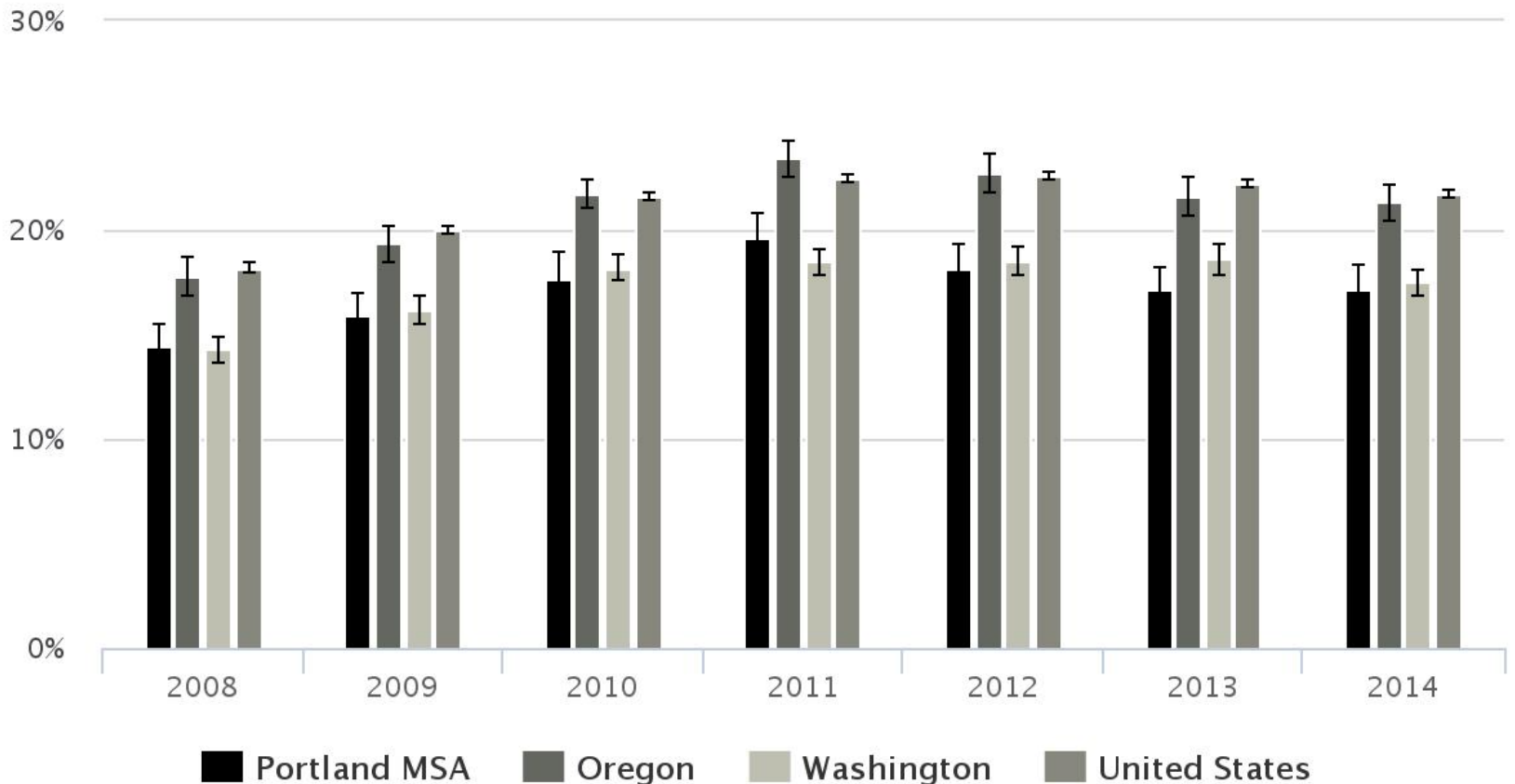
Median household income, Portland MSA, 2005-2014 one-year estimates

Source: US Census, American Community Survey, Table B19013



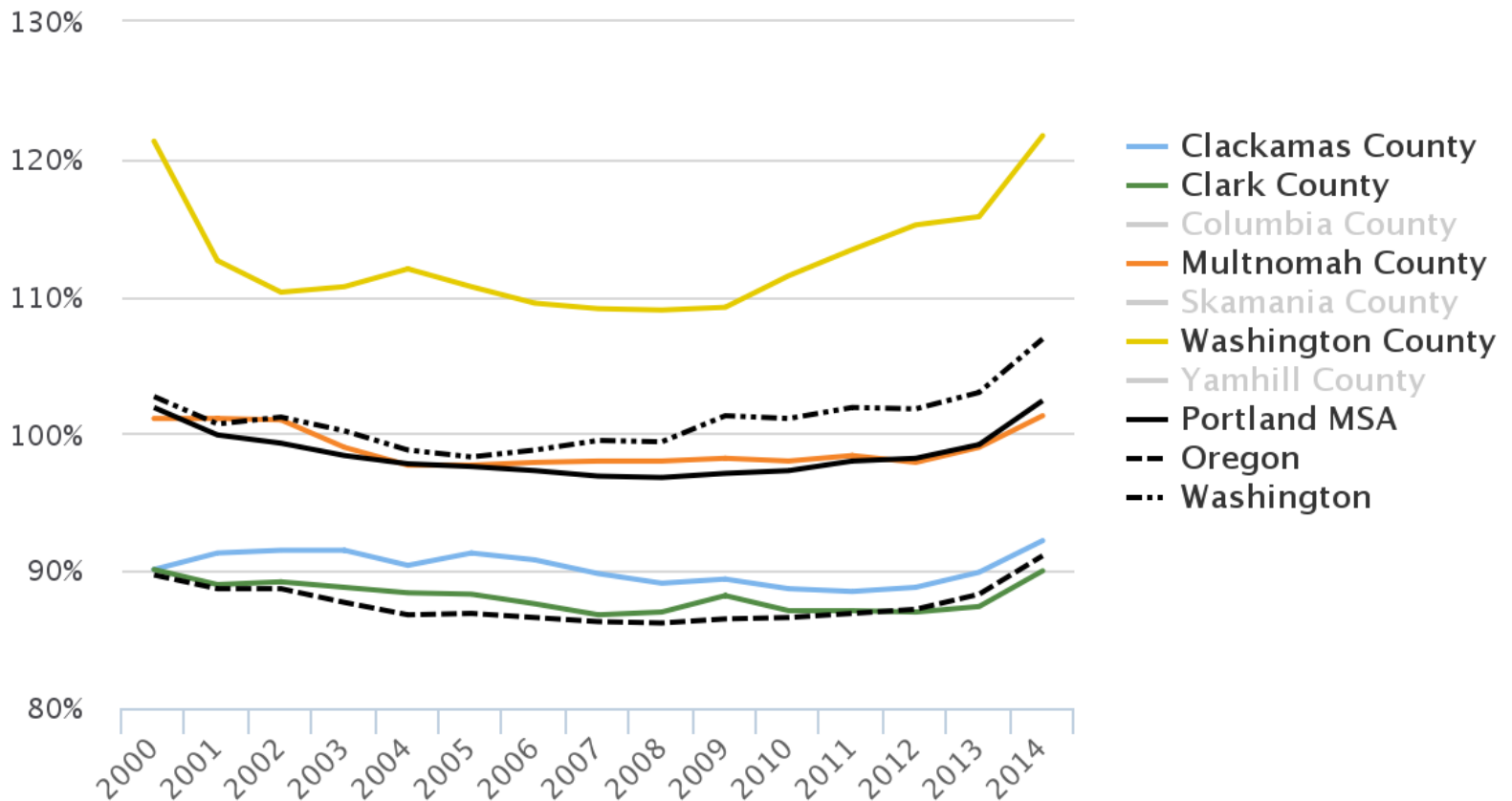
Percentage of children in poverty, Portland MSA, 2008–2014 estimates

Source: US Census, Small Area Income and Poverty Estimates



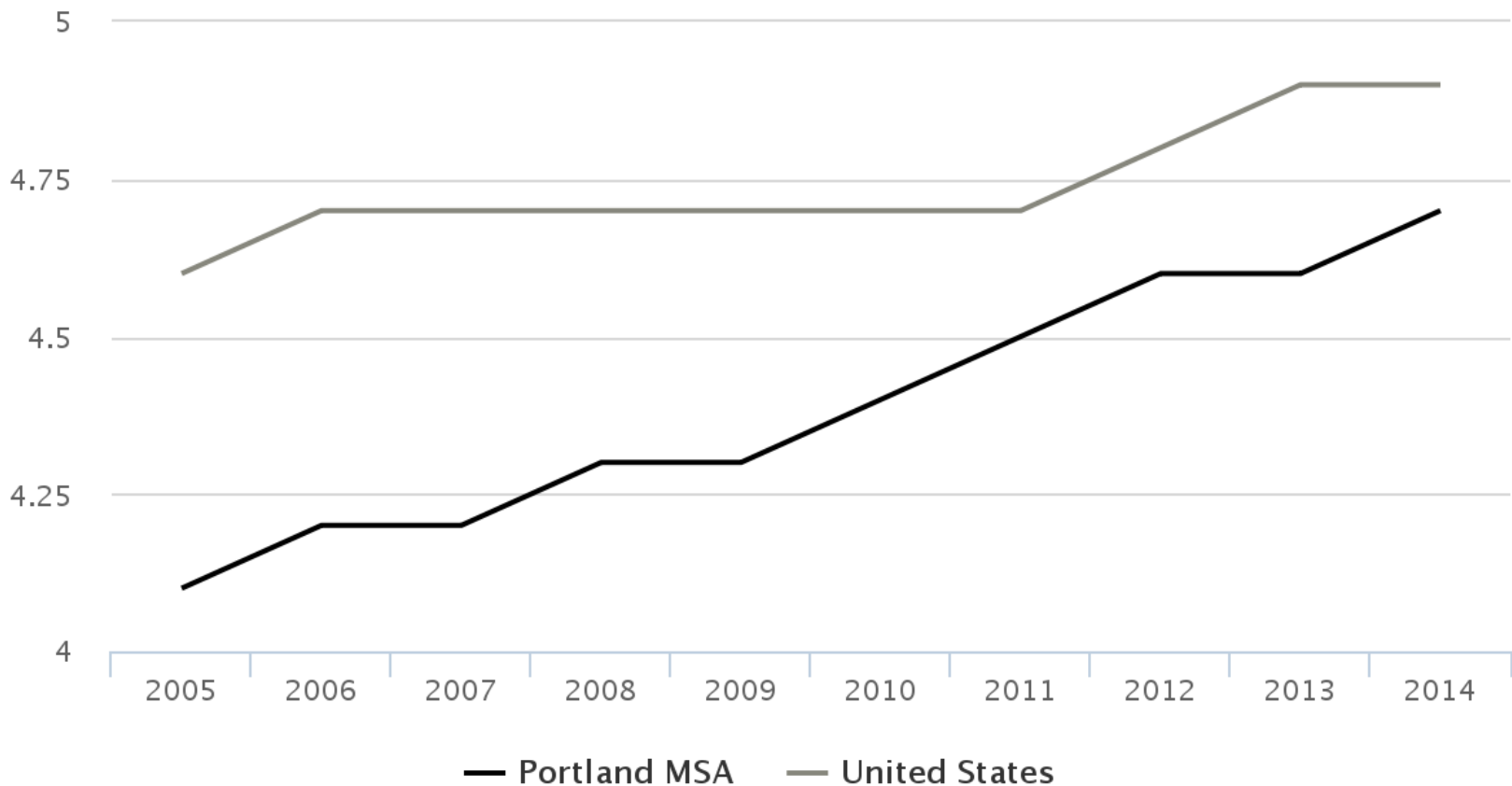
Portland MSA average wage as a percent of US metro average wage, 2001-2014

Sources: Bureau of Economic Analysis, Table CA30



Ratio of wage for 90 percentile wage to 10 percentile wage, 2005-2014

Source: Bureau of Labor Statistics, Occupational Employment Statistics Wage Survey



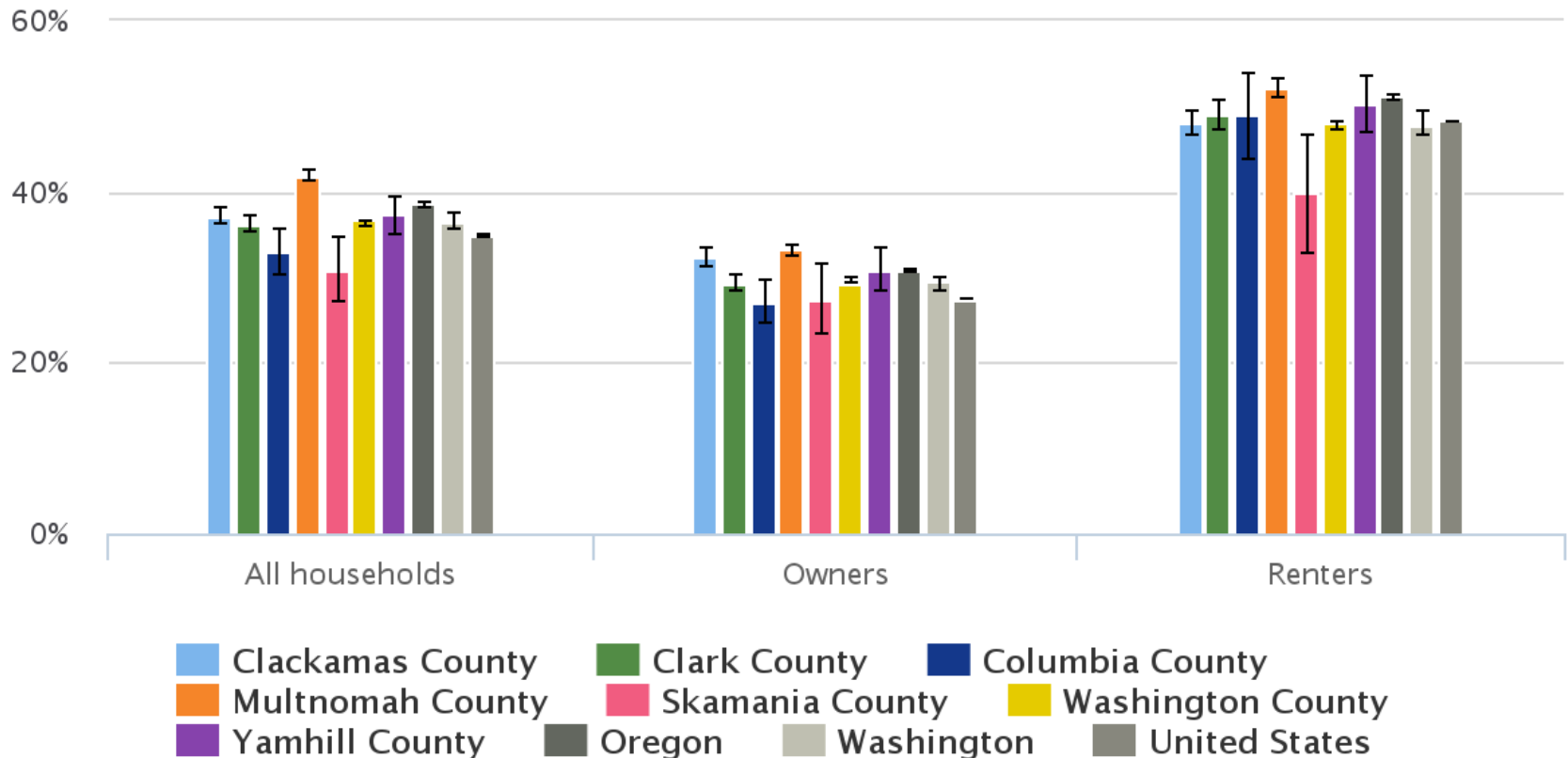


Portland's housing crunch

Who gets to live here?

Percentage of households spending 30 percent or more of their income on housing, by county, Portland MSA, 2010-2014 five-year estimates

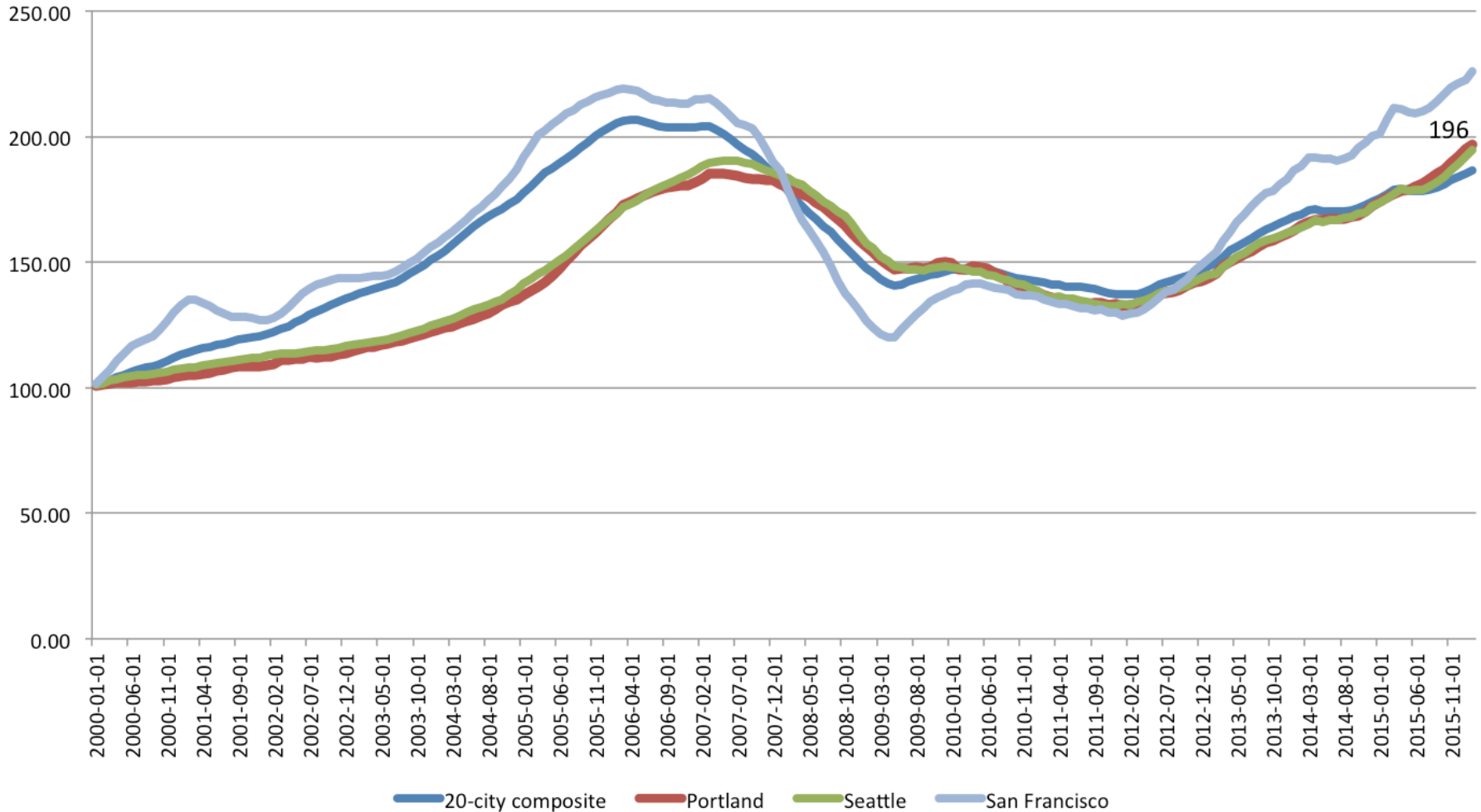
Source: US Census, American Community Survey, Table DP04



S&P/Case Shiller Index

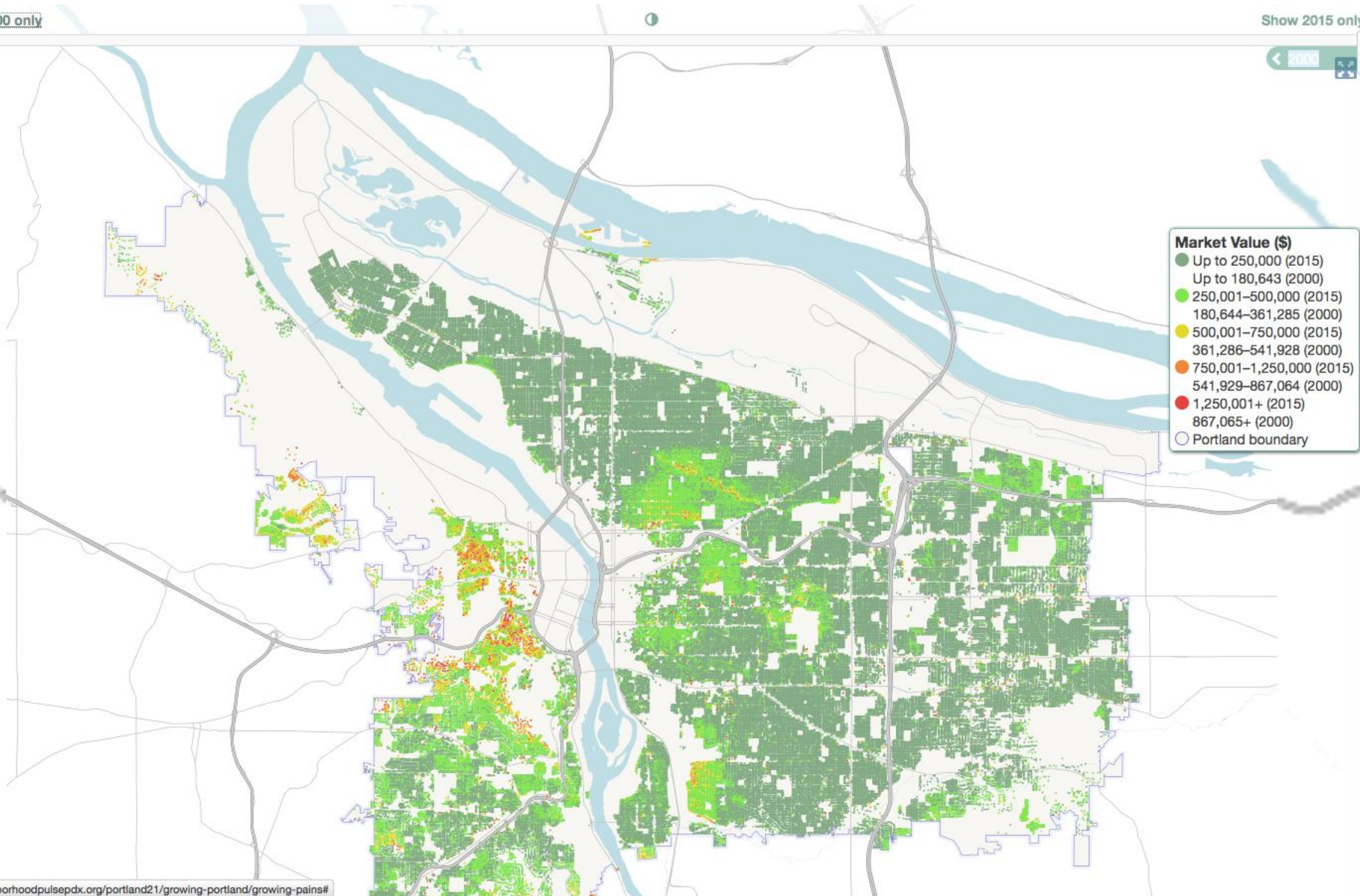
2000 to Feb 2016

2000 = 100



Show 2000 only

Show 2015 only



Market Value (\$)

- Up to 250,000 (2015)
- Up to 180,643 (2000)
- 250,001–500,000 (2015)
- 180,644–361,285 (2000)
- 500,001–750,000 (2015)
- 361,286–541,928 (2000)
- 750,001–1,250,000 (2015)
- 541,929–867,064 (2000)
- 1,250,001+ (2015)
- 867,065+ (2000)
- Portland boundary

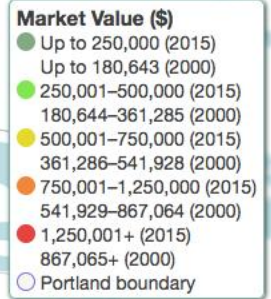
www.neighborhoodpulsepx.org/portland21/growing-portland/growing-pains#

Source: Neighborhoodpulsepx.org

Show 2000 only

Show 2015 only

+ 2015 >
-

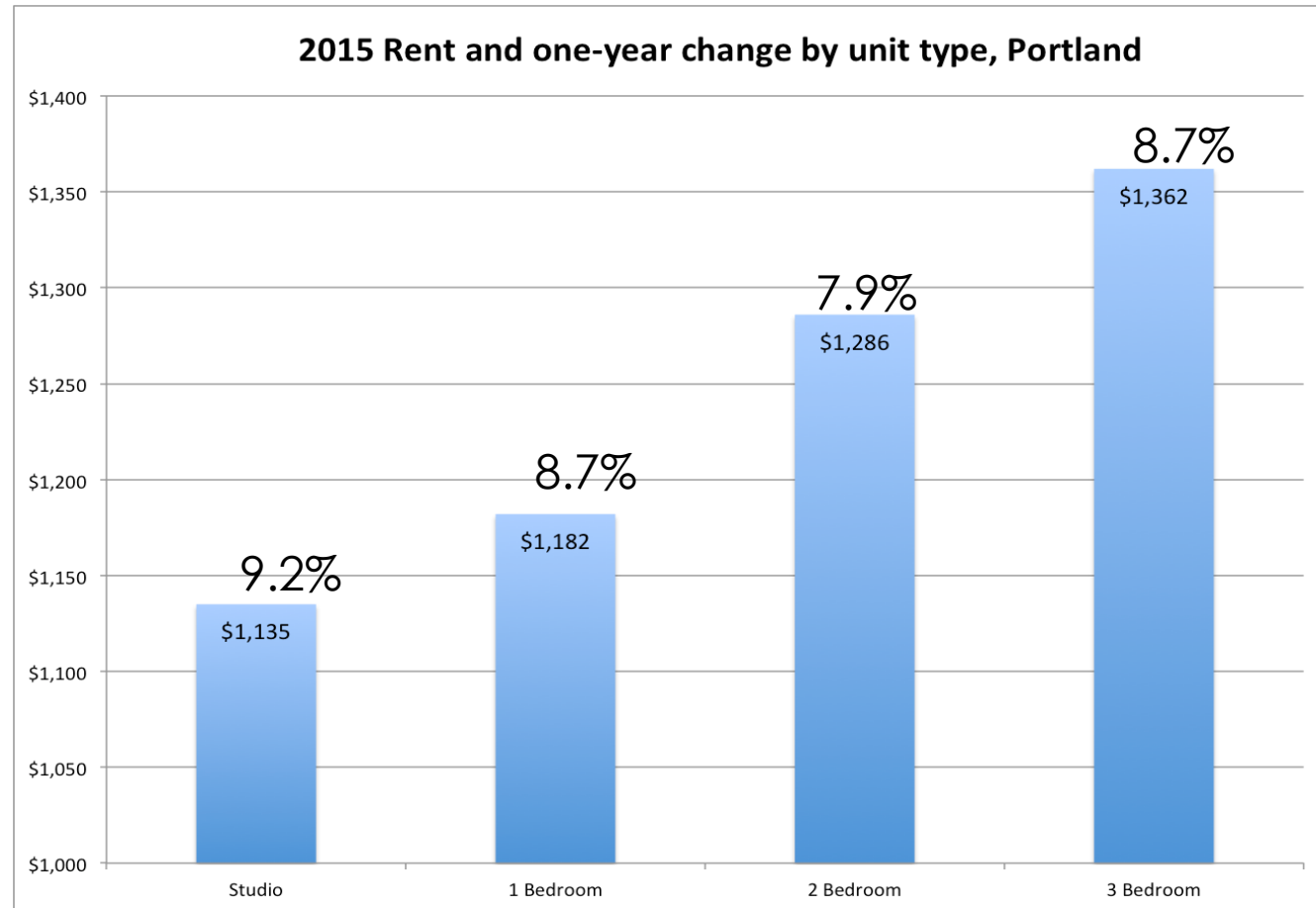


www.neighborhoodpulsepdx.org/portland21/growing-portland/growing-pains#

Source: Neighborhoodpulsepdx.org

Rent increases in Portland are widespread

Increases have been **greatest** in some of the formerly most affordable neighborhoods.



Source: CoStar Multifamily Residential Market Data, Sept. 2015, via City of Portland Bureau of Development Services, via *State of Housing in Portland*, October 2015, page 37.

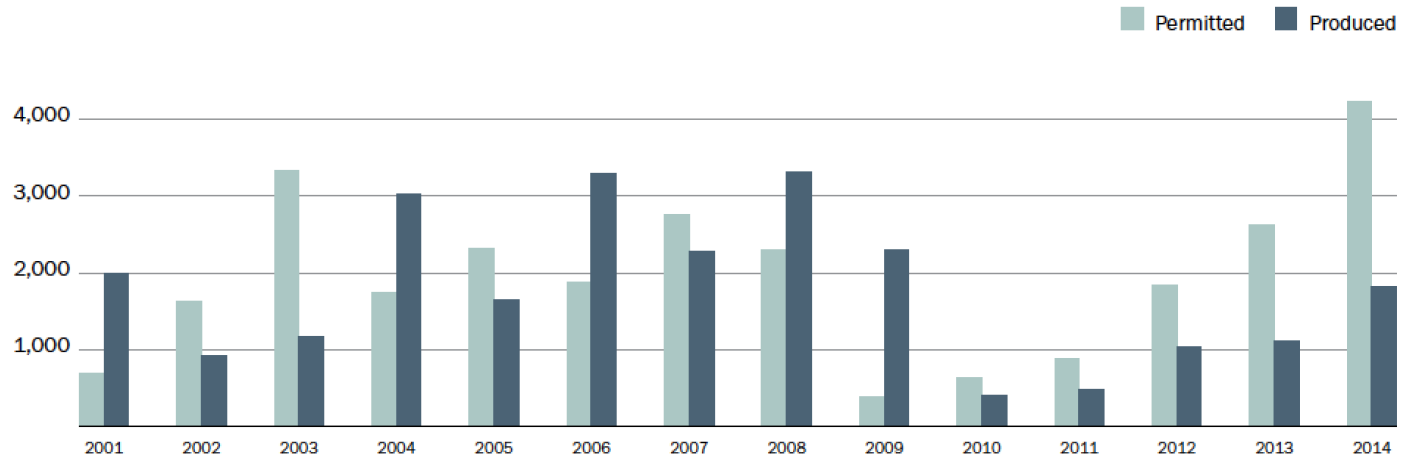
Construction has been slow to catch up

**Building permits for new private housing
Portland-Vancouver-Hillsboro MSA, seasonally adjusted**



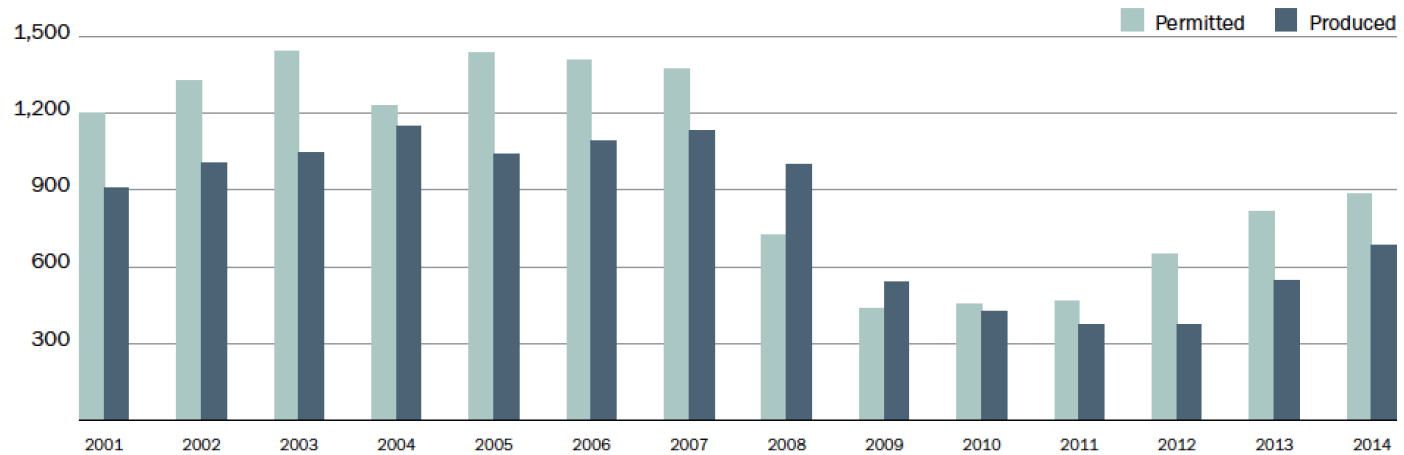
Source: U.S. Census Bureau Building Permit survey via Alex Joyce, Residential Market Analysis, Center for Real Estate Quarterly, 10(1) Winter 2016, p. 32.

Fig. 2.15 Multifamily Unit Permits & Production, 2000-2014



Source: City of Portland, Bureau of Development Services; Multnomah County, Portland Tax Lot Data 2015

Fig. 2.16 Single-Family Unit Permits & Production, 2000-2014



Source: City of Portland Bureau of Development Services, via *State of Housing in Portland*, October 2015, page 21.

Do we have a cost problem or
an income problem?

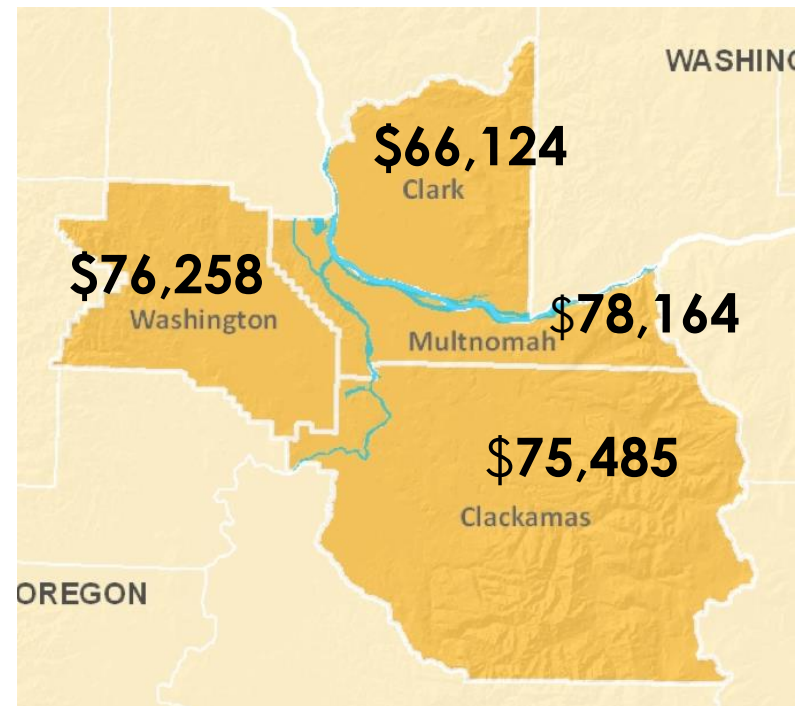
The Policy Gap

Federal Poverty Standard 2014

\$23,850



Self-Sufficiency Standard 2014



Source: *Who is making ends meet in the Portland region?* Institute of Portland Metropolitan Studies, www.pdx.edu/ims/



A Tale of 3 Cities: Portland

Sheila Martin,
Director, Institute of Portland Metropolitan
Studies/
Population Research Center