

Impact of Land Use Regulations on Workforce Demographics: Case of Industrial Sanctuary Workforce from Portland, OR

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Does “Type of Jobs” create “Type of Workers”?

- workforce characteristics of industrial sanctuary establishments;
- workforce characteristics of downtown establishments;
- compare & contrast sanctuary workers to downtown workers.

Comparison Geographies

Downtown



Industrial sanctuaries



- Areas located east-west of Willamette river;
- Sanctuary largely zoned industrial;
- Downtown largely zoned commercial;

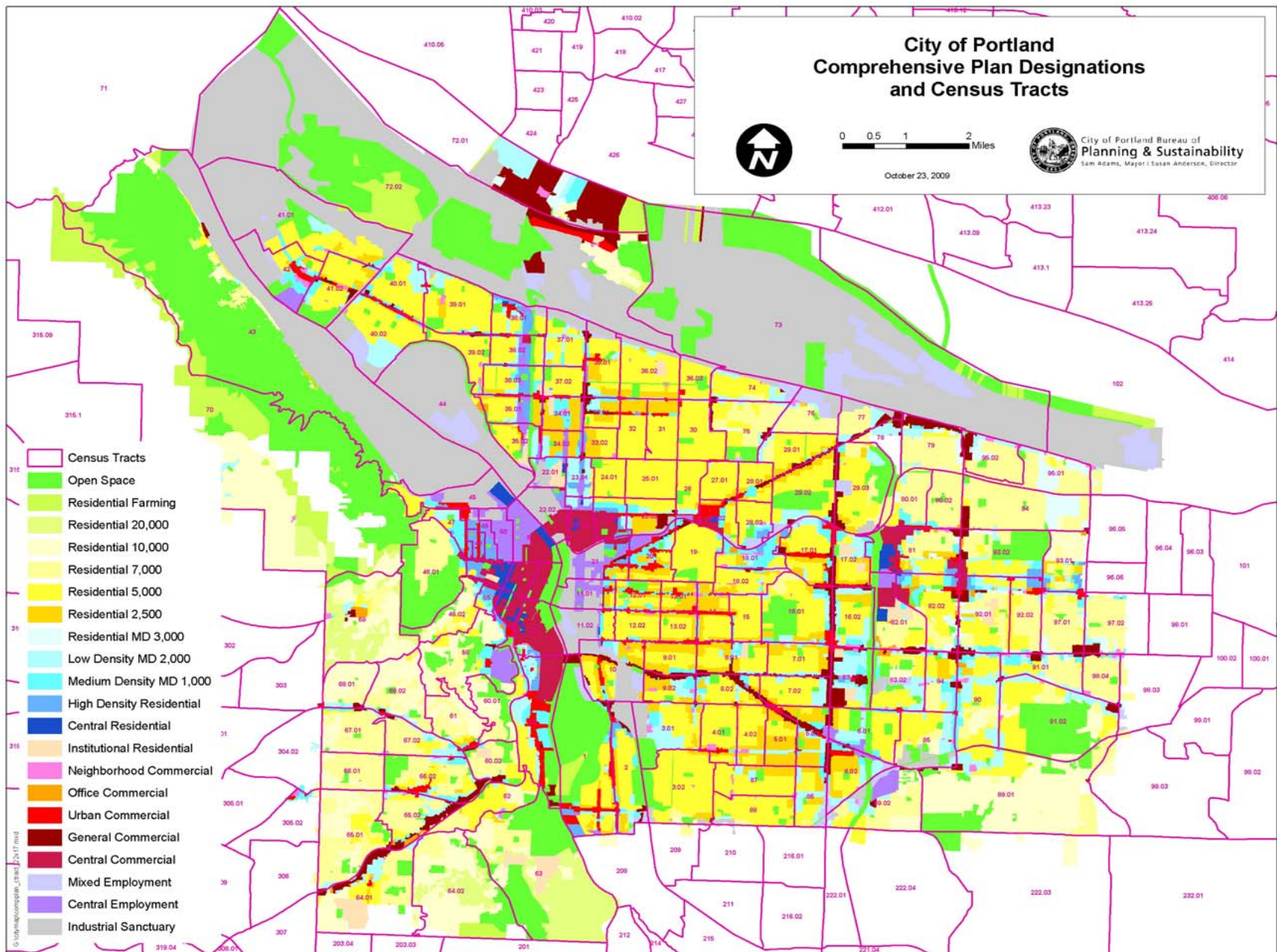
Industrial Sanctuaries in Portland

Portland's Comprehensive Plan Policy 2.14:

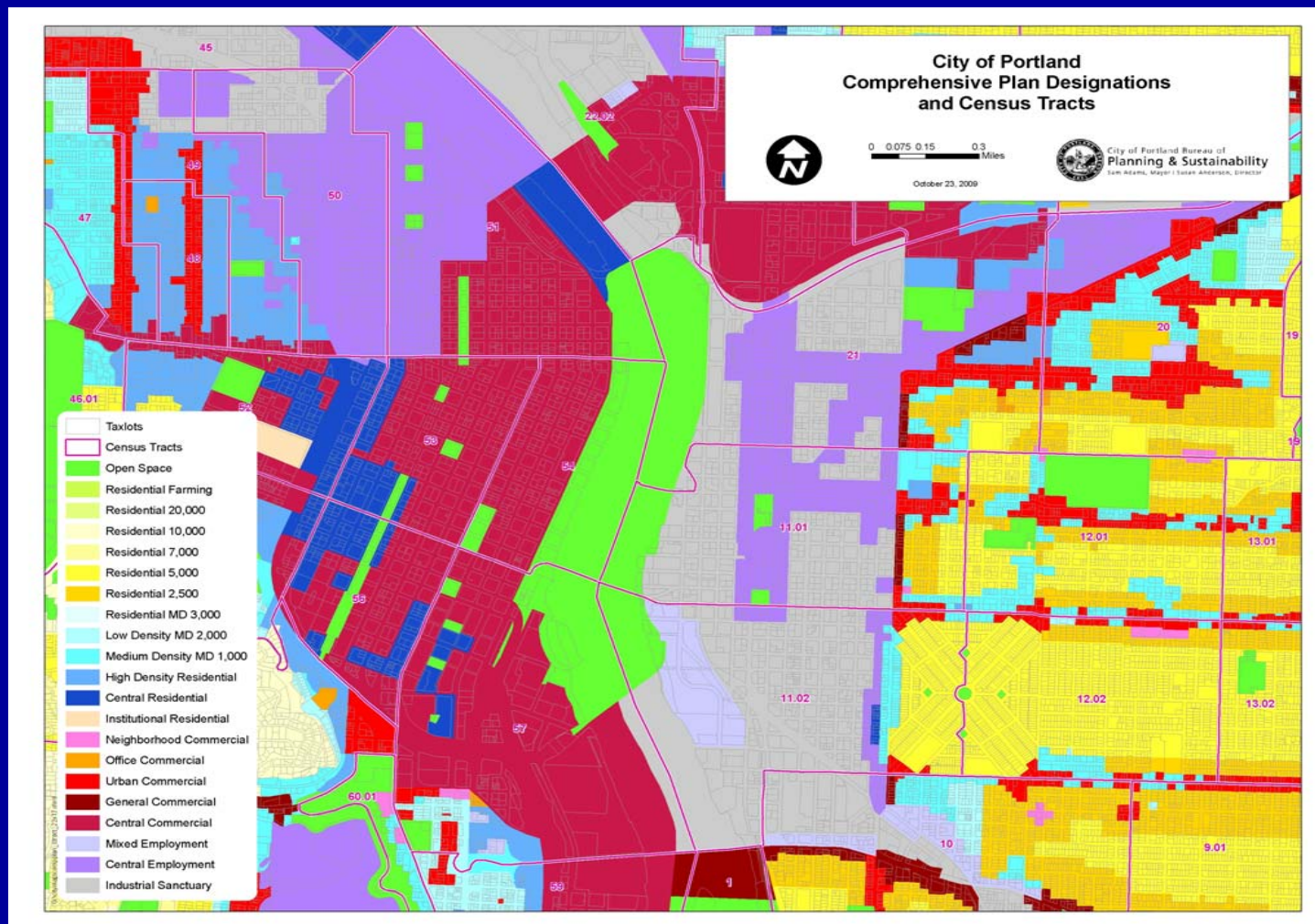
**Provide industrial sanctuaries.
Encourage the growth of industrial activities in the city by preserving industrial land primarily for manufacturing purposes.**

Why Protect Land for Industrial Activities?

- critical for economic vitality;
- jobs have above average wages;
- greater economic multiplier effects than other sectors;
- maintain competitive edge in response to need for industrial space.



Land Use Designation Industrial Sanctuary vs. Downtown



The Industrial Central East-Side



Typical Street in the Inner Eastside



- **mixed industrial /employment district with small-block development pattern**



Sanctuary, Not Exclusively Industrial



➤OMSI (Oregon Museum of Science & Industry), a significant presence

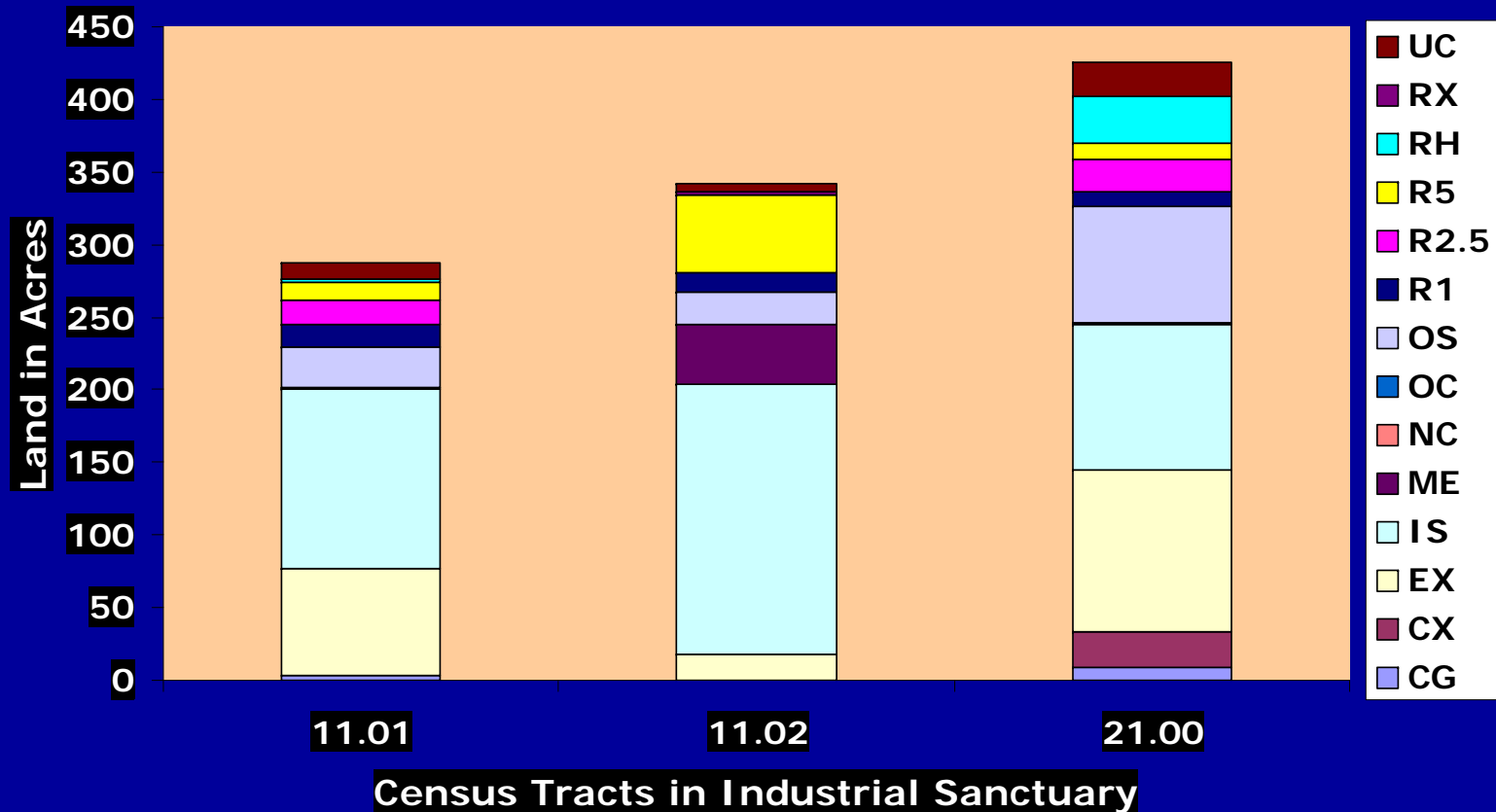
Downtown as seen from the Sanctuary..



A look at Downtown Portland

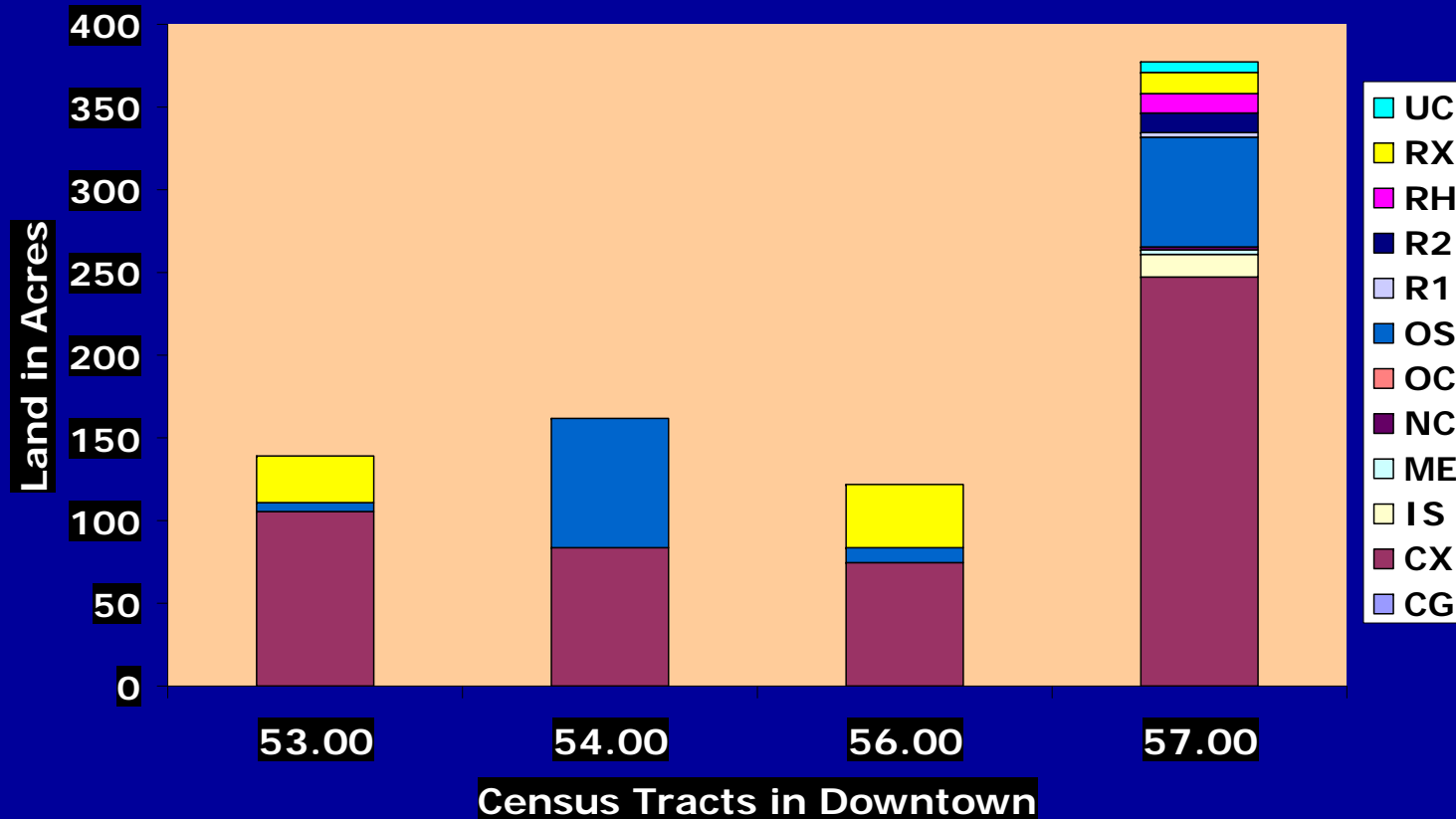


Land use by Zone: Industrial Sanctuary



Source: City of Portland, Comprehensive Plan

Land Use by Zone: Downtown



Source: City of Portland, Comprehensive Plan

Profile of Workers in Sanctuary vs. Downtown, 2008

Total All Jobs

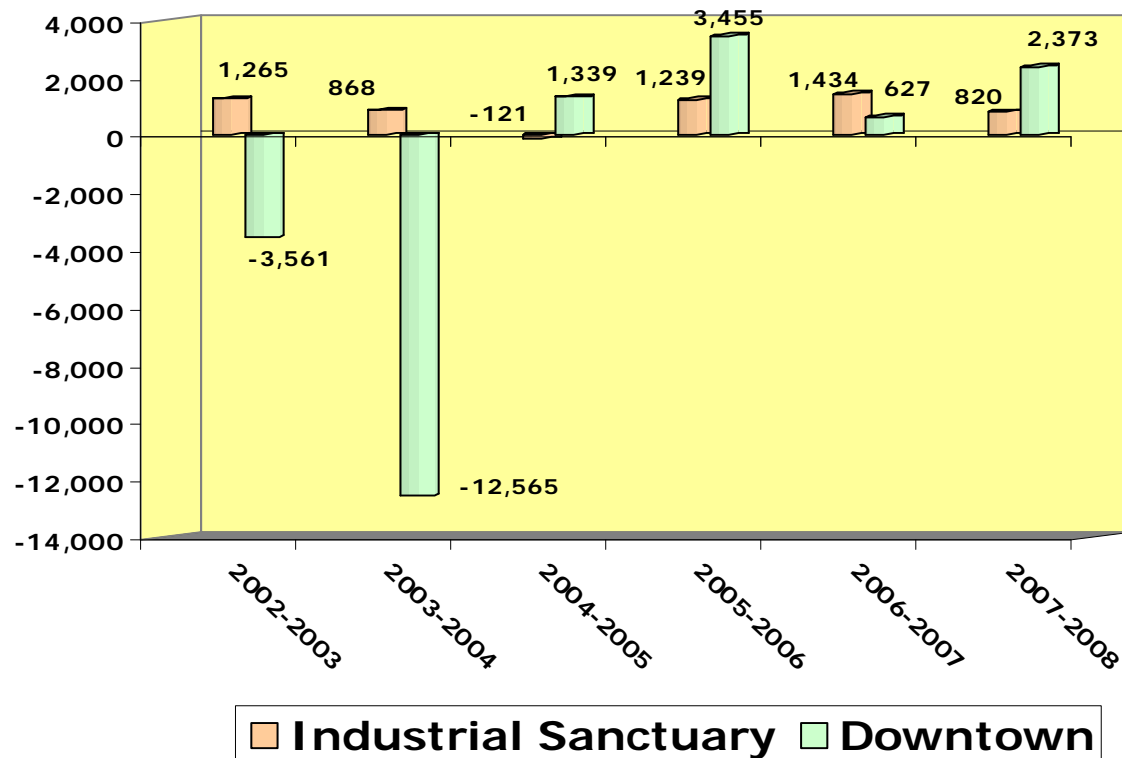
	Sanctuary Workforce		Downtown Workforce	
	Count	Share	Count	Share
Total All Jobs	19,925	100.0%	74,443	100.0%
Jobs by Worker Age				
	Count	Share	Count	Share
Age 30 or younger	4,922	24.7%	17,335	23.3%
Age 31 to 54	11,633	58.4%	44,317	59.5%
Age 55 or older	3,370	16.9%	12,791	17.2%
Jobs by Earnings Paid				
	Count	Share	Count	Share
\$1,250 per month or less	4,355	21.9%	12,464	16.7%
\$1,251 to \$3,333 per month	8,379	42.1%	22,806	30.6%
More than \$3,333 per month	7,191	36.1%	39,173	52.6%

Source: OnTheMap

Comparison of Workers Profiles

- Size: Downtown workforce (19% of City) nearly four times the Sanctuary (5% of City);
- Job Density: Downtown (93 jobs/acre) nearly 5 times Sanctuary (19 jobs/acre);
- Age: nearly identical age distribution. areas mimic the City's workforce;
- Earnings: more higher income jobs Downtown (53%) than in Sanctuary (36%). Downtown higher than City as a whole.

Job Growth: Sanctuary vs. Downtown 2002-2008



Source: OnTheMap

Jobs by Industry Type (2-digit NAICS), 2008

	Sanctuary Jobs		Downtown Jobs	
Mining, Quarrying, and Oil and Gas Extraction	0	0.0%	0	0.0%
Utilities	0	0.0%	25	0.0%
Construction	2,141	10.7%	1,132	1.5%
Manufacturing	1,905	9.6%	181	0.2%
Wholesale Trade	3,096	15.5%	780	1.0%
Retail Trade	1,592	8.0%	3,558	4.8%
Transportation and Warehousing	648	3.3%	141	0.2%
Information	520	2.6%	5,791	7.8%
Finance and Insurance	624	3.1%	11,625	15.6%
Real Estate and Rental and Leasing	628	3.2%	2,315	3.1%
Professional, Scientific, and Technical Services	1,284	6.4%	12,939	17.4%
Management of Companies and Enterprises	254	1.3%	3,451	4.6%
Administration & Support, Waste Mgmt.	898	4.5%	6,986	9.4%
Educational Services	374	1.9%	4,803	6.5%
Health Care and Social Assistance	1,927	9.7%	2,319	3.1%
Arts, Entertainment, and Recreation	901	4.5%	805	1.1%
Accommodation and Food Services	1,304	6.5%	5,874	7.9%
Other Services (excluding Public Administration)	1,269	6.4%	2,802	3.8%
Public Administration	556	2.8%	8,727	11.7%

QWI Indicators: Sanctuary vs. Downtown, 2006

	Industrial Sanctuary	Downtown
	Count	Count
Number of Employers	1,092	2,769
Employment (Beginning-of-2nd quarter)	10,200	52,700
Employment, Stable Jobs	8,802	46,290
Separations, Stable Jobs	840	4,084
New Hires, Stable Jobs	940	5,416
Firm Job Gain	1,015	2,643
Firm Job Loss	443	1,743
Employment (reference quarter)	13,250	62,772
Average Monthly Earnings, Stable Jobs	2,983	3,345
Average Monthly Earnings Separations from Stable Jobs	1,450	1,532
Average Monthly Earnings, New Hires, Stable Jobs	2,108	2,443

Where Do Workers in Study Area Live?, 2008

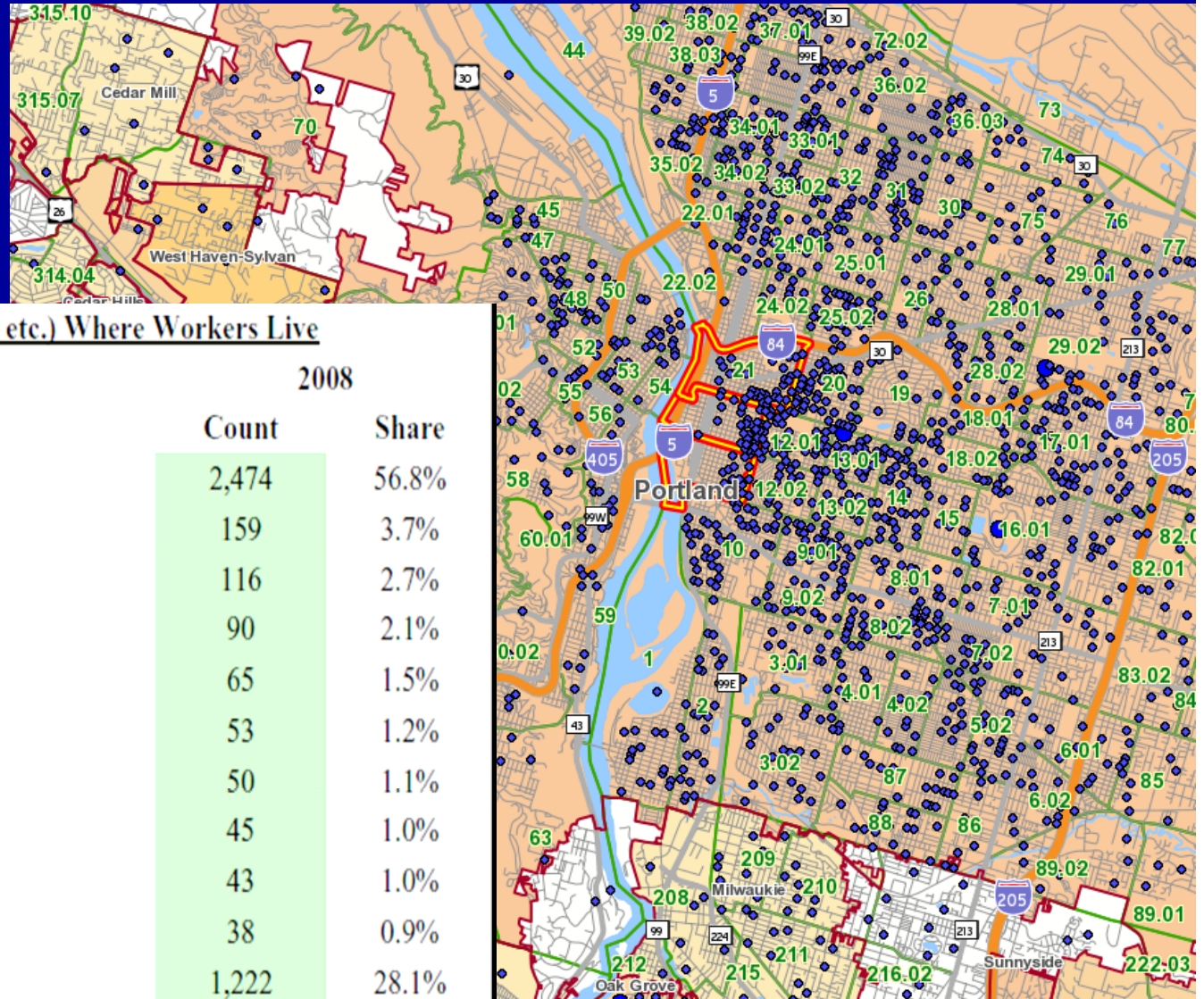
Industrial Sanctuary			Downtown		
	Count	Share		Count	Share
Total All Jobs	19,925	100.0%		74,443	100.0%
Portland city, OR	9,726	48.8%	Portland city, OR	33,113	44.5%
Gresham city, OR	933	4.7%	Beaverton city, OR	3,672	4.9%
Vancouver city, WA	696	3.5%	Gresham city, OR	2,590	3.5%
Beaverton city, OR	542	2.7%	Vancouver city, WA	2,253	3.0%
Milwaukie city, OR	295	1.5%	Hillsboro city, OR	1,695	2.3%
Hillsboro city, OR	283	1.4%	Lake Oswego city, OR	1,615	2.2%
Lake Oswego city, OR	279	1.4%	Tigard city, OR	1,481	2.0%
Oregon City, OR	262	1.3%	Aloha CDP, OR	1,334	1.8%
Aloha CDP, OR	251	1.3%	West Linn city, OR	814	1.1%
Tigard city, OR	243	1.2%	Salem city, OR	788	1.1%
All Other Locations	6,415	32.2%	All Other Locations	25,088	33.7%

Source: OnTheMap

Where Do Residents of Study Area Work? , 2008

Industrial Sanctuary			Downtown		
	Count	Share		Count	Share
Total All Jobs	3,519	100.0%		4,202	100.0%
Portland city, OR	2,463	70.0%	Portland city, OR	2,672	63.6%
Beaverton city, OR	145	4.1%	Beaverton city, OR	179	4.3%
Tigard city, OR	82	2.3%	Hillsboro city, OR	167	4.0%
Gresham city, OR	75	2.1%	Tigard city, OR	103	2.5%
Hillsboro city, OR	66	1.9%	Tualatin city, OR	70	1.7%
Milwaukie city, OR	47	1.3%	Gresham city, OR	69	1.6%
Lake Oswego city, OR	47	1.3%	Salem city, OR	66	1.6%
Tualatin city, OR	34	1.0%	Wilsonville city, OR	64	1.5%
Vancouver city, WA	31	0.9%	Lake Oswego city, OR	56	1.3%
Salem city, OR	31	0.9%	Vancouver city, WA	44	1.0%
All Other Locations	498	14.2%	All Other Locations	712	16.9%

Where Do Industrial Sanctuary Workers Making \$1,250/mo or Less Live?

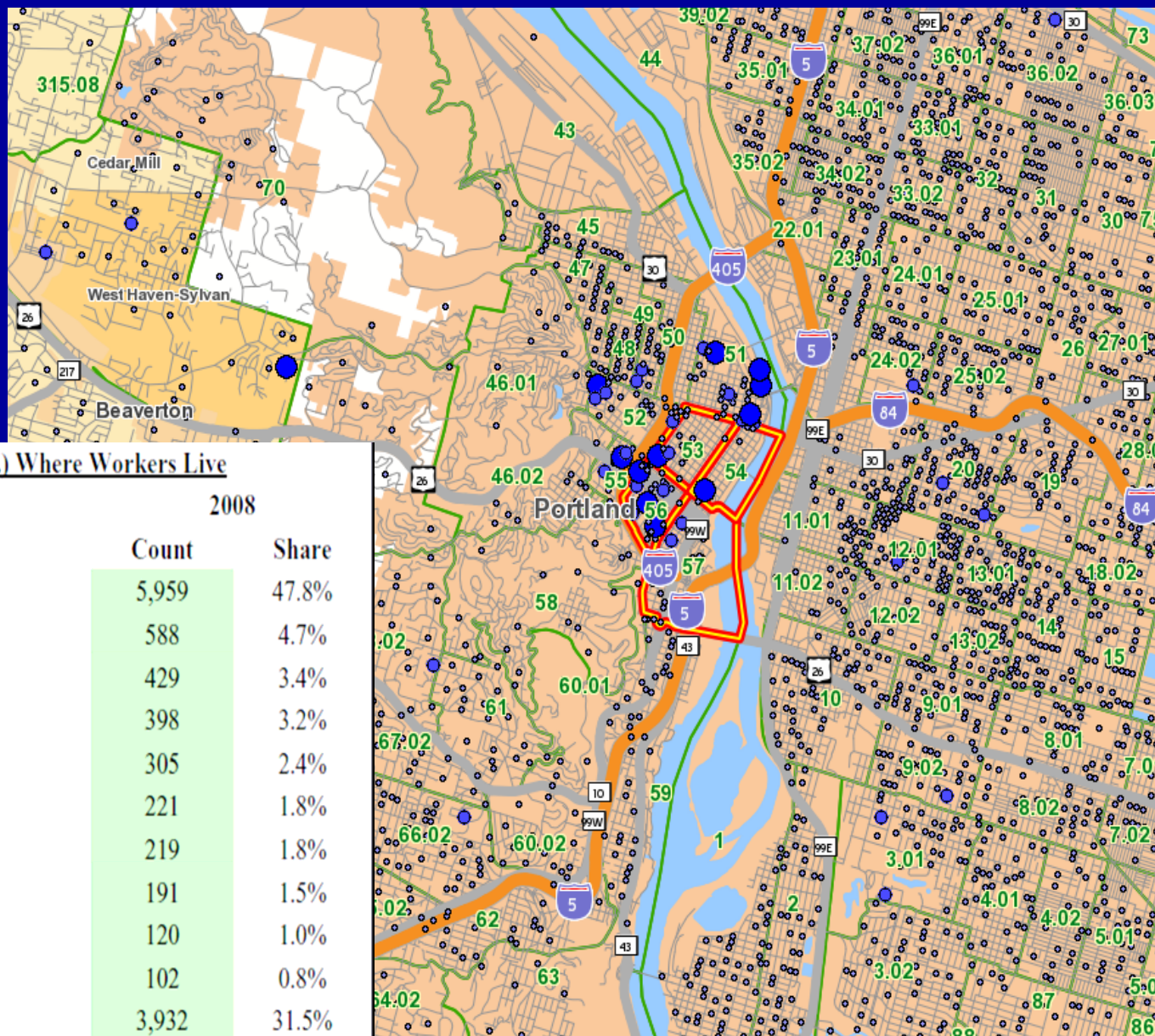


Jobs in Places (Cities, CDPs, etc.) Where Workers Live

2008

	Count	Share
Portland city, OR	2,474	56.8%
Gresham city, OR	159	3.7%
Vancouver city, WA	116	2.7%
Beaverton city, OR	90	2.1%
Hillsboro city, OR	65	1.5%
Tigard city, OR	53	1.2%
Milwaukie city, OR	50	1.1%
Aloha CDP, OR	45	1.0%
Oregon City city, OR	43	1.0%
Salem city, OR	38	0.9%
All Other Locations	1,222	28.1%

Where Do Downtown Workers Making \$1,250/mo or Less Live?

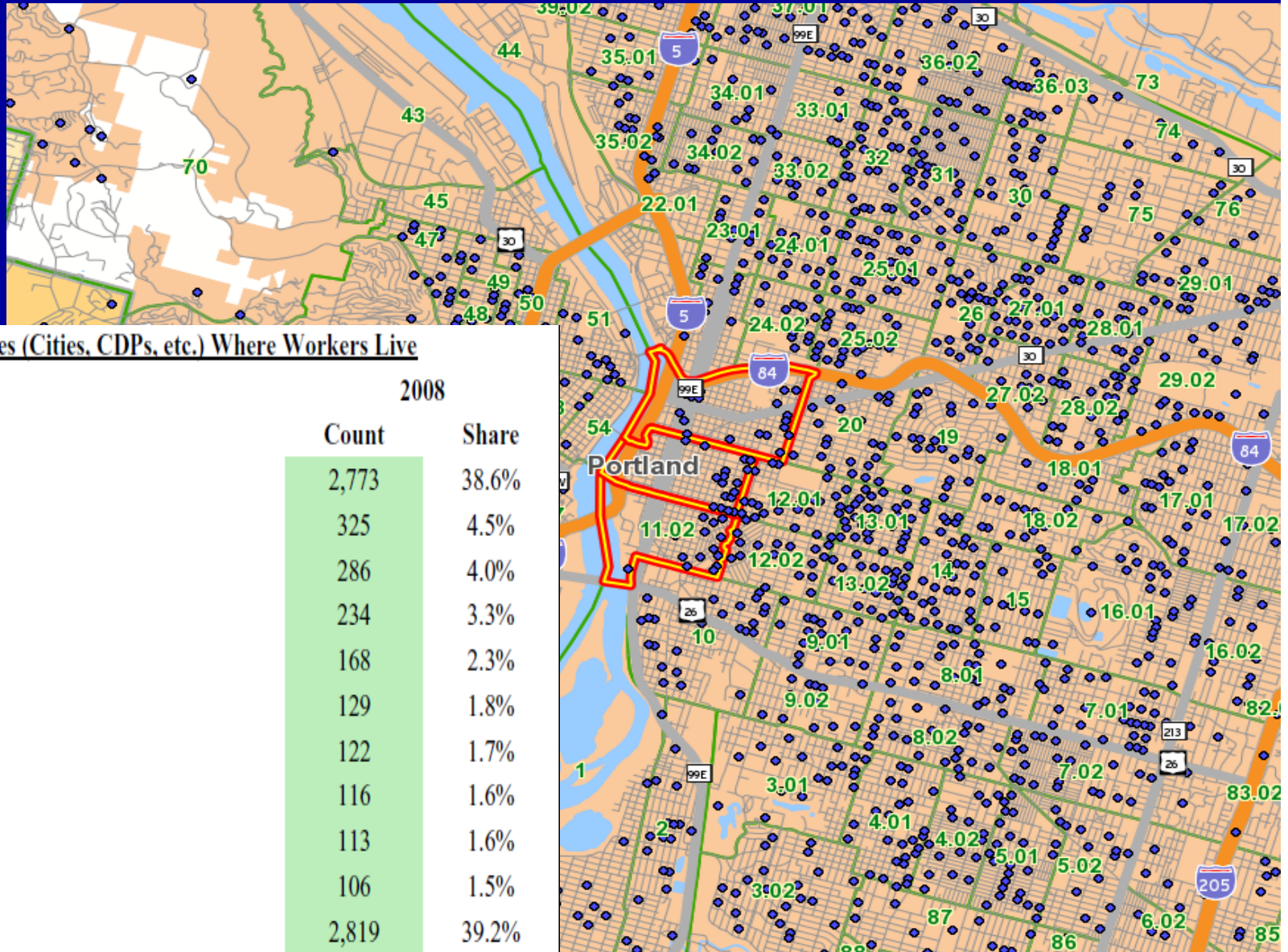


Jobs in Places (Cities, CDPs, etc.) Where Workers Live

2008

	Count	Share
Portland city, OR	5,959	47.8%
Beaverton city, OR	588	4.7%
Gresham city, OR	429	3.4%
Vancouver city, WA	398	3.2%
Hillsboro city, OR	305	2.4%
Tigard city, OR	221	1.8%
Aloha CDP, OR	219	1.8%
Lake Oswego city, OR	191	1.5%
Salem city, OR	120	1.0%
Milwaukie city, OR	102	0.8%
All Other Locations	3,932	31.5%

Where Do Industrial Sanctuary Workers Making More Than \$3,333/mo Live?

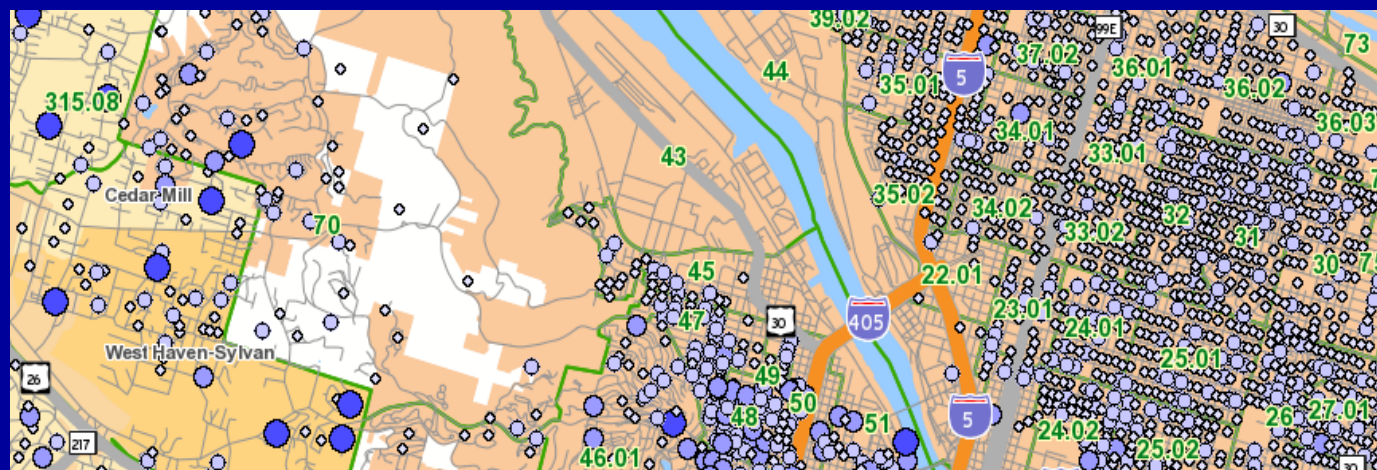


Jobs in Places (Cities, CDPs, etc.) Where Workers Live

2008

	Count	Share
Portland city, OR	2,773	38.6%
Gresham city, OR	325	4.5%
Vancouver city, WA	286	4.0%
Beaverton city, OR	234	3.3%
Lake Oswego city, OR	168	2.3%
Oregon City city, OR	129	1.8%
Hillsboro city, OR	122	1.7%
Milwaukie city, OR	116	1.6%
Aloha CDP, OR	113	1.6%
West Linn city, OR	106	1.5%
All Other Locations	2,819	39.2%

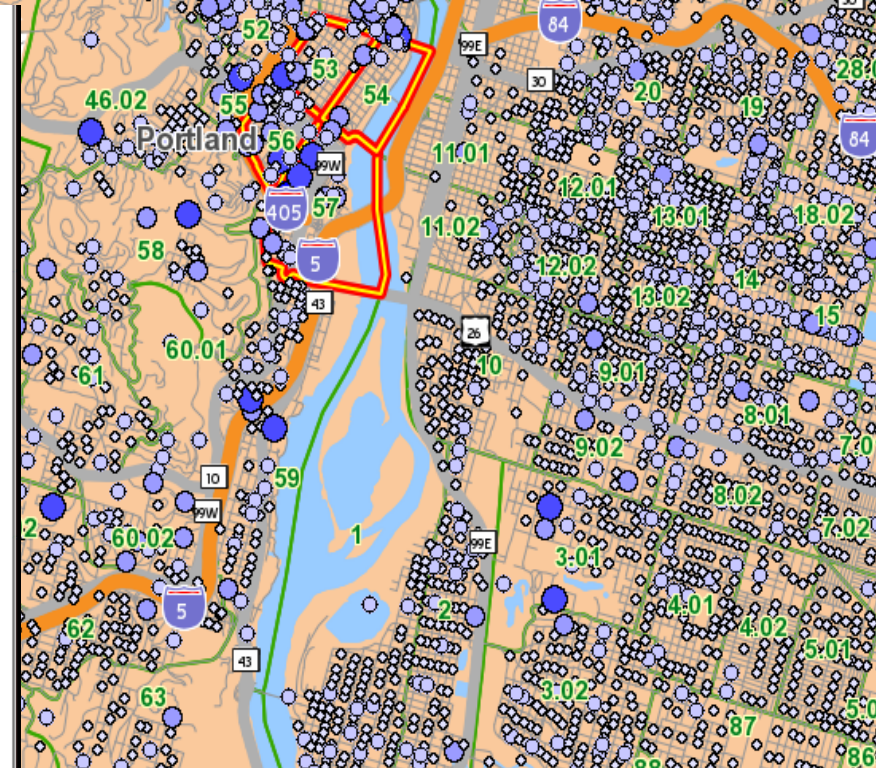
Where Do Downtown Workers Making More Than \$3,333/mo Live?



Jobs in Places (Cities, CDPs, etc.) Where Workers Live

2008

	Count	Share
Portland city, OR	16,526	42.2%
Beaverton city, OR	1,989	5.1%
Gresham city, OR	1,189	3.0%
Vancouver city, WA	1,177	3.0%
Lake Oswego city, OR	1,139	2.9%
Tigard city, OR	815	2.1%
Hillsboro city, OR	785	2.0%
Aloha CDP, OR	658	1.7%
West Linn city, OR	570	1.5%
Cedar Mill CDP, OR	426	1.1%
All Other Locations	13,899	35.5%



Concluding Observations

- “job mix” in sanctuary is distinct;
- sanctuary workers differ in size and earnings;
- workers similar in age distribution;
- less than 50% of workers from both areas live in the City;
- over 60% of residents in the two areas work in the City.

Back-up Slides

Census Tracts Where Workers Live, 2008

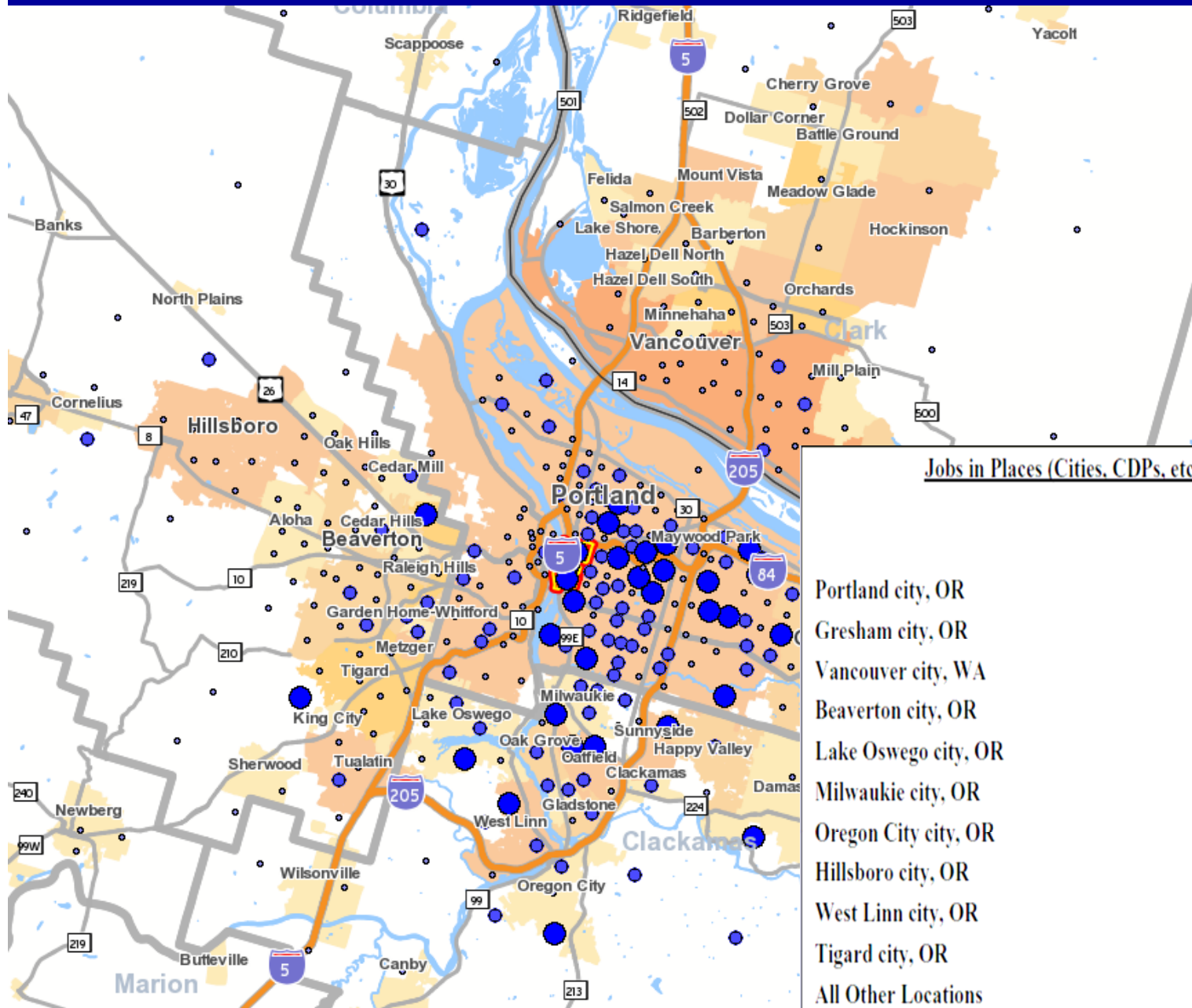
Industrial Sanctuary			Downtown		
	Count	Share		Count	Share
Total All Jobs	19,925	100.0%		74,443	100.0%
20 (Multnomah, OR)	189	0.9%	301 (Washington, OR)	622	0.8%
10 (Multnomah, OR)	176	0.9%	51 (Multnomah, OR)	598	0.8%
11.01 (Multnomah, OR)	168	0.8%	315.10 (Washington, OR)	552	0.7%
12.01 (Multnomah, OR)	164	0.8%	20 (Multnomah, OR)	546	0.7%
14 (Multnomah, OR)	151	0.8%	52 (Multnomah, OR)	462	0.6%
21 (Multnomah, OR)	150	0.8%	3.02 (Multnomah, OR)	432	0.6%
16.01 (Multnomah, OR)	141	0.7%	1 (Multnomah, OR)	430	0.6%
17.01 (Multnomah, OR)	131	0.7%	2 (Multnomah, OR)	422	0.6%
8.02 (Multnomah, OR)	127	0.6%	13.01 (Multnomah, OR)	411	0.6%
13.01 (Multnomah, OR)	126	0.6%	64.01 (Multnomah, OR)	407	0.5%
All Other Locations	18,402	92.4%	All Other Locations	69,561	93.4%

Source: OnTheMap

Census Tracts Where Area Residents Are Employed, 2008

Industrial Sanctuary			Downtown		
Total All Jobs	3,519	100.0%		4,202	100.0%
53 (Multnomah, OR)	323	9.2%	53 (Multnomah, OR)	577	13.7%
11.01 (Multnomah, OR)	165	4.7%	56 (Multnomah, OR)	197	4.7%
21 (Multnomah, OR)	141	4.0%	57 (Multnomah, OR)	184	4.4%
51 (Multnomah, OR)	137	3.9%	58 (Multnomah, OR)	176	4.2%
11.02 (Multnomah, OR)	115	3.3%	54 (Multnomah, OR)	176	4.2%
54 (Multnomah, OR)	91	2.6%	51 (Multnomah, OR)	132	3.1%
73 (Multnomah, OR)	72	2.0%	73 (Multnomah, OR)	92	2.2%
10 (Multnomah, OR)	69	2.0%	52 (Multnomah, OR)	84	2.0%
50 (Multnomah, OR)	63	1.8%	50 (Multnomah, OR)	67	1.6%
57 (Multnomah, OR)	62	1.8%	326.05 (Washington, OR)	62	1.5%
All Other Locations	2,281	64.8%	All Other Locations	2,455	58.4%

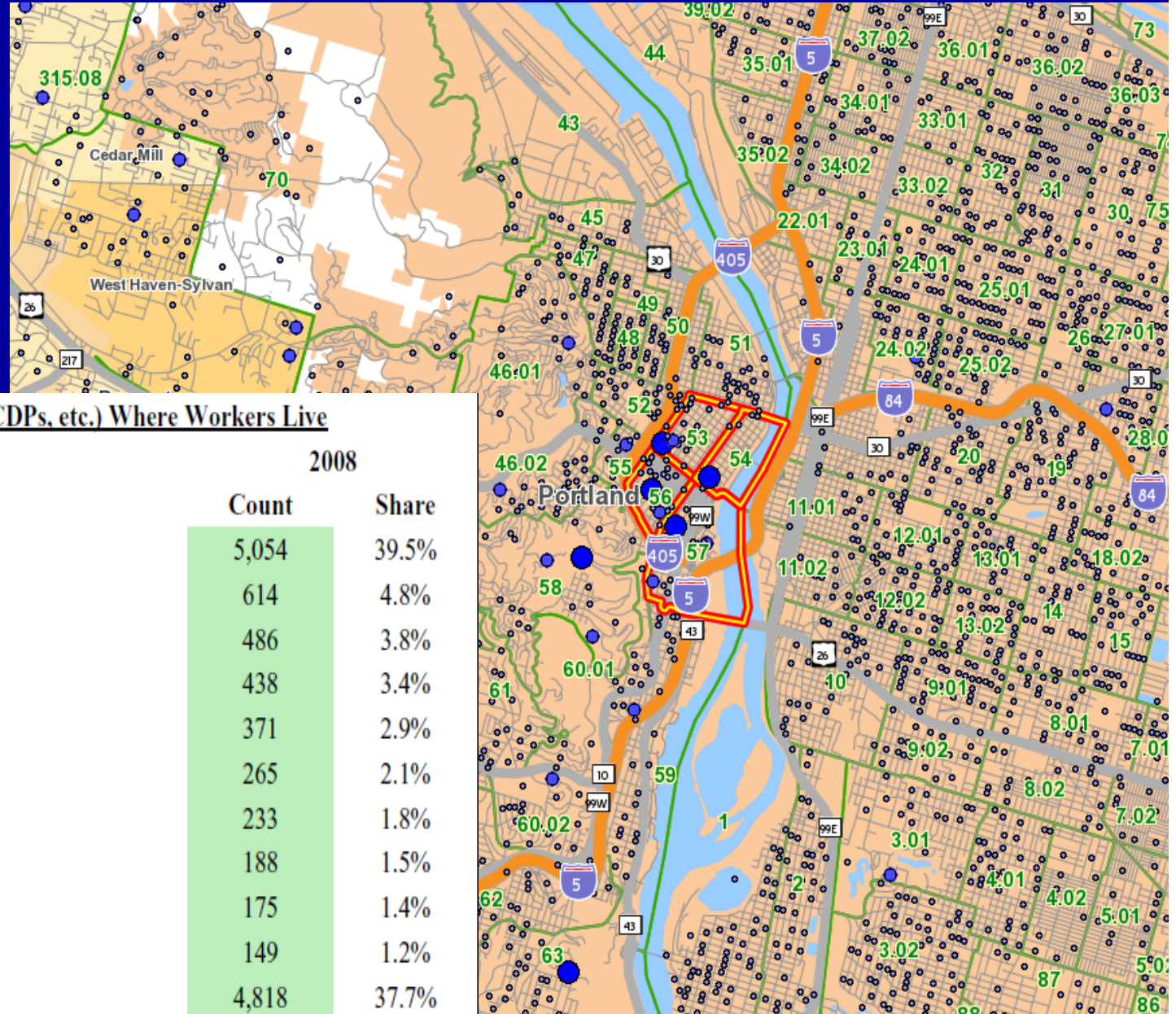
Where Do Industrial Sanctuary Workers 55 or Older Live?



Jobs in Places (Cities, CDPs, etc.) Where Workers Live

	2008	
	Count	Share
Portland city, OR	1,461	43.4%
Gresham city, OR	145	4.3%
Vancouver city, WA	143	4.2%
Beaverton city, OR	94	2.8%
Lake Oswego city, OR	70	2.1%
Milwaukie city, OR	68	2.0%
Oregon City city, OR	57	1.7%
Hillsboro city, OR	50	1.5%
West Linn city, OR	48	1.4%
Tigard city, OR	44	1.3%
All Other Locations	1,190	35.3%

Where Do Downtown Workers 55 or Older Live?



Jobs in Places (Cities, CDPs, etc.) Where Workers Live

2008

	Count	Share
Portland city, OR	5,054	39.5%
Beaverton city, OR	614	4.8%
Gresham city, OR	486	3.8%
Lake Oswego city, OR	438	3.4%
Vancouver city, WA	371	2.9%
Tigard city, OR	265	2.1%
Hillsboro city, OR	233	1.8%
West Linn city, OR	188	1.5%
Aloha CDP, OR	175	1.4%
Salem city, OR	149	1.2%
All Other Locations	4,818	37.7%