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THE YOUNG AND THE RESTLESS:

How Portland Competes for Talent

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PORTLAND:

The Inside Story

INSIGHTS:

- Metropolitan Portland--the federally designated Portland-Salem Consolidated Metropolitan Area- has proportionately more young adults than most large metropolitan areas in the U.S.—about 15.2 percent of Portland's population was between 25 and 34, compared to the average for U.S. metropolitan areas of 14.5 percent.
- Portland is about average in college attainment, ranking 27th in the percent of 25 to 34 year-olds with college education (29.0 percent), but its college-educated young adult population grew five times faster than the average for U.S. metropolitan areas in the 1990s.
- Portland has 37,400 more 25 to 34 year-olds than in 1990, an increase of 12 percent, in sharp contrast to a national decline of 8 percent.
- Portland's young adult population is less diverse than the typical U.S. metro. Portland ranks 12th of the 50 largest U.S. metros in the percentage of the population that is white and 49th in the proportion of young adult African-Americans.
- Metropolitan Portland is experiencing net domestic in-migration among 25 to 34 year-olds, gaining a net of 35,000 people in this category from the rest of the U.S. in the past five years. Additionally, Portland attracted about 20,700 international migrants in this age group. Portland has a particularly high rate of in-migration relative to out-migration; for every ten 25 to 34 year-olds who moved into the region, six left.
- Portland's aggregate migration flows are primarily with other places in the West, which account for 70 percent of Portland's 25 to 34 year-old in-migrants and out-migrants. Portland gains net new young adult residents primarily from California, Seattle, and other cities in Oregon, and loses them only to a few fast-growing cities in the West (Las Vegas, Phoenix) and South (Charlotte). The region receives net migration from 43 of the other 49 largest U.S. metropolitan areas.
- The growth of the region's young adult population has been fueled by the attractiveness of the central city and Washington County. Young adults generally and college-educated 25 to 34 year olds in particular are disproportionately represented in close-in Portland neighborhoods—residents within 3 miles of the city center are 50 percent more likely to be 25 to 34 years old.

OPPORTUNITIES:

- Among the five cities where focus groups were conducted, Portland elicited the most positive views. Its urban fabric has special appeal, with participants citing the city's size, walkability, public transportation, bike-friendliness, distinctive neighborhoods and independent businesses as contributing to a feeling of community, manageability and safety. Portland has much to sell.
- But young people feel that Portland is not sufficiently selling its assets to people like them. Nor do they feel that Portland is aggressively pursuing obvious economic opportunities that would generate additional income and career opportunities.
- Though they may not yet have children of school age, the condition of Portland's public schools was a serious concern. Young people viewed the school system as a fundamental component of Portland's success.
- Metropolitan Portland's lack of diversity, particularly the lack of African-Americans, was noted. Diversity conveys vibrancy and sophistication in a city, and while Portland's urban fabric works greatly in the city's favor, its lack of diversity works against it.

A NATIONAL PERSPECTIVE:

The Wave of Demographic Change

A demographic wave is sweeping across our nation, and it will be a decisive force in shaping the economic destiny of Portland. As cities move increasingly into a knowledge-based economy, the kind of talented people each attracts will determine whether it wins or loses in the campaign for future prosperity.

For this reason, the seminal question facing Portland is: Will Portland catch this wave and prosper or capsize and flounder in its undertow?

Standing on the beach and watching the movement of the ocean, it is easy to be lulled into the impression that it is rhythmic, synchronous and unchanging. But beneath the undulating surface water are powerful currents and tides that transform course and climate. The same is true for the wave of demographic trends under way in the United States, and why it has gone largely unnoticed.

The United States is in the midst of a major demographic shift. It will have profound implications on the economic health of cities and metropolitan areas throughout the nation. These shifts would be momentous under any circumstances, but are all the more striking by the advent of the knowledge-based economy.

The overall growth of the U.S. population—28 million more residents to metropolitan America in the 1990s—conceals the

decline in a pivotal segment of our population. Almost unnoticed, the number of young adults has declined fully 8 percent—the metropolitan U.S. has three million fewer 25 to 34 year-olds in 2000 than it did in 1990.

This group is the gold standard in the knowledge-based economy, and as a result, they are particularly critical to the long-term economic health of metropolitan areas. These young adults, men and women, have completed their formal educations and acquired their initial

work experiences. They are primed to start on their career paths.

Statistically, 25 to 34 year-olds are the hardest-working segment of the population. In their mid-20s, they are also at the peak of their mobility and more likely to move across state lines than at any time in their lives. In the time between their 25th and 35th birthdays, these young adults not only start careers, but find mates, start families, and put down roots. Once rooted in place, the likelihood of their moving to another state or metropolitan area will decline precipitously.

In recent years, cities have become increasingly aware of the economic importance of talented workers, the people called the “creative class” by professor and author Richard Florida. These talented workers—writers, designers, engineers, architects, researchers, and others—play a key role in creating the new ideas that drive business success and regional economic progress. The greatest opportunity to attract and retain these workers is when they are young and mobile, and indeed, our research shows a strong correlation between places with a significant fraction of the young and the restless and various indices of the creative workforce.

For the nation’s metropolitan areas, then, this shrinking group of young adults is daily making decisions on their personal futures that will in turn have profound effects on the future of economic growth for decades to come.

The importance of this trend has been masked by three years of languishing economic growth (and in many places actual job declines). With job losses still fresh in mind, it’s not as obvious that availability of talent is a critical factor for economic success. But as the nation puts the lingering recession behind it, and as job growth accelerates (as now, finally, appears to be the case), an abundant supply of knowledge workers will be a city’s competitive advantage.

This phenomenon will happen just as the U.S. is moving from a 30-year era of rapid labor force growth to a period of much slower growth and likely shortages. The three decisive trends that drove the growth of the U.S.





labor force in the past three decades—the maturing of the Baby Boom generation, women’s greatly increased economic role, and the increase in college attainment—all reverse or flatten out in the next two decades. The Baby Boom generation, now in its peak earning years, will soon begin retiring, depriving the economy of some of its most seasoned workers. Women’s labor force participation doubled since the 1950s and has been a key force in growing the U.S. economy, but it cannot go much higher. And finally, the expansion of college education in the last two generations, raising college attainment rates from less than 10 percent of the population to more than 30 percent of young adults, has stopped growing. The combination of Baby Boom retirements, no net addition of women to the labor force, and a constant college attainment rate mean that labor is likely to be in short supply over the next two decades.

In this environment of labor shortage, metropolitan areas like Portland are in effect in active competition for a limited supply of young workers, particularly those in the 25 to 34 year-old age group, the most mobile in the population. Over the five-year period of 1995 to 2000, more than 3 million persons in this group moved among metropolitan areas, and these areas also attracted nearly 2 million more persons from abroad. Most metropolitan areas lost population in the 25 to 34 age group during

the 1990s, largely because of the national demographic trends. But some metropolitan areas were big gainers, because they attracted more than their share of this mobile group.

The defining question going forward is: How well is Portland positioned to compete for this mobile and economically important group?

We frame the answer to this question in two parts; first, *qualitatively*, relating the comments and insights obtained in interviews and focus groups of 25 to 34 year-olds in Portland and other regions, and second, *quantitatively*, looking at the region’s standing and track record in attracting the Young and Restless.

HOW TALENTED YOUNG WORKERS VIEW PORTLAND – AND OTHER CITIES

Introduction



Four focus groups for this project were conducted in Portland on February 23 and 24, 2004. Participants in three groups were college-educated 25-34 year olds who were relative newcomers to the community. The fourth group was made up of corporate and third-party recruiters.

Focus group findings in Portland were compared with findings from groups conducted in Tampa Bay, FL; Richmond, VA; Providence, RI and Philadelphia, PA.

We found that participants shared many ideas about what they wanted in a city. From these commonly expressed desires, we developed ten general themes voiced in all participating cities.

We also found specific opportunities and challenges for Portland.

Comments in support of the general themes are representative of what we heard in all of the focus groups. Although there may not be a specific focus group comment included in this report from Portland in support of a specific theme, it does not mean that this topic was not discussed in Portland. It was. A limited number of representative comments are used for sake of brevity and readability.

We do note the general themes that may have special urgency in Portland based on the comments we heard.

All of the comments in support of the specific themes for Portland are from focus groups in your metro area.





WHAT THE YOUNG AND THE RESTLESS WANT FROM CITIES –

Ten General Themes

THEME ONE: OPEN THE CIRCLE AND WELCOME NEWCOMERS

Richard Florida, in his best-selling book “The Rise of the Creative Class,” expressed this essential for successful cities as one of his three T’s -- tolerance. Dr. Florida characterized it in terms of tolerating people of color, of different sexual orientation, people of different national origins, even people with tattoos.

It is all of this and more. Expressed most simply, cities that want to attract and keep smart young people must be open to newcomers as full participants in the community’s civic, social and business life.

And in every city we visited, focus group participants said their cities could do a better job.

“I was looking to get involved but found it hard to break into social circle. It’s closed. A tight circle. The city is kind of traditional. Who you know is important. It’s different coming in from the outside. It’s frustrating to try to be involved.”

“If you’re not from here, you have to pretend you are to ease in.”

“There’s an attitude that if you’re not part of the Yacht Club, you’re nobody.”

“It’s maddening to come here from D.C. My resume was devalued because I hadn’t worked in [this state].”

“I was concerned as an outsider. I thought I could never join the club.”

“Everyone is entangled. Everyone is related. It’s incestuous. It’s weird coming in as an outsider.”

“People who grew up have a tight circle. It’s almost like there should be a club, called ‘Hi, I’m Not from Here.’ We need social connections.”



THEME TWO: WELCOME NEW IDEAS

The difference in attitudes between long-time residents and newcomers can be quite striking from the perspective of newcomers. Newcomers often feel their ideas are discounted or dismissed.

"When you get here, people are stuck in their old ways. The reaction is often, 'We've never done it that way before.'"

"The attitude is, 'Oh, we've done that. It's not going to work.'"

"They discount whole new groups of people who seek change."

The newcomers expressed the opinion that long-time residents were attempting to hold on to their way of doing things, and in some cases, their power.

"People with the control to change this city don't want it to change. They want it to be the city their grandfather grew up in."

"There are the people who feel they can create new things and then there are the founders who know the ropes, have a sense of closure, and that new ideas have already been tried."

"Let it go. Let go of the reins. Let change happen. Let new blood in."

THEME THREE: ENCOURAGE DIVERSITY

Given the demographic changes in America, successful cities will provide a supportive environment for minorities. The presence of minorities, according to focus group participants, makes communities more interesting and appealing and it reflects a community's open-mindedness, even sophistication.

"There is a lack of diversity. In New Jersey, there are more flavors of people and that makes things more interesting."

"I miss the diversity of San Francisco. The white thing is a little much. I was walking around one day, and I thought, 'There's something weird about this place,' then I realized everybody's white."

"This city lacks diversity tremendously. This was a huge disappointment. The city doesn't do much to attract diversity. People are a little bit close-minded. That's the thing I hate the most. There's a lot of chauvinistic behavior. Women have to overly prove themselves."

"I was surprised that this city didn't have more diversity. Immigrants are important because they help revitalize cities. This city is black and white. They don't talk about much more."

"I hated the diversity of Miami. I was too immature to handle it. Then I moved to New Orleans, and I cultivated an appreciation for diversity."

And certainly, minorities are particularly sensitive to the presence of other minorities and to how sophisticated a city's citizens are in their treatment of minorities. A comment from one Asian-American woman, born in California, makes the point:

"Some of the diversity issues really bother me. I get a lot of weird comments, like 'Your English is good.' I would worry about raising children in a predominantly white environment."

Diversity, however, is not simply a matter of race and ethnicity. It is also a matter of diversity of attitude.



Echoing themes one and two, three women had this exchange in one focus group:

"I bought into the stereotypes. The women [here] aspired to be country club women. They were not culturally curious."

"That was one of the reasons I didn't want to be here. No diversity or cultural curiosity."

"I left for the same reasons. I said I would never come back."

Even income diversity was interpreted as an asset.

"There is a good mix of classes here. I like to see that."

The desire for diversity extended beyond people to include distinctive neighborhoods, shops, restaurants and history. In fact, this was a repeated theme throughout our groups.

"[What really appeals to me is] the number of non-chain restaurants within walking distance."

"This town is not run by malls. There are boutiques, interesting things to do. Every city is the same: no charm, no uniqueness, no character."

"The presence of independent shops and restaurants is huge."

"Distinctive shops and restaurants produce atmosphere and community rather than chains that produce efficiency."

"Capitalize on diversity – people, places and things. Don't whitewash it. This is a city with history."

THEME FOUR: CREATE A PLACE WHERE PEOPLE CAN BE THEMSELVES

It begins with tolerance, but it's really more than that. Smart young people want to live in cities where they can create their own lives doing it their way.

"Here, you have the ability to thrive in your own little world."

"I can be myself. I don't have to fit into a mold."

"It's a place you can create your own life. It's not necessarily easy. There is not a pre-formed pattern: (like Dallas and sales). The X-Y-Z is not as clear. It's hard but rewarding. It's your own."

Former Southerners now living outside the South were particularly grateful for the ability to be themselves rather than to act out a stereotype.

"I'm from the South, and there, the expectations are to be a certain type, look a certain way."

"Here, there are so many open-minded people. People are able to tell their opinions. You feel free to express yourself."

"I thought of this state as the Land of the Misfit Toys. I found my tribe. We didn't fit other places. There is more a sense of purpose because we chose this place."

"Minorities," naturally, find environments that allow them to be themselves particularly appealing. One gay, African-American man described "working against type" this way:

"I am always aware of who and what I am. It is very draining. In Chicago the fluidity is much easier. There I can forget who I am. Here, I never forget."



THEME FIVE: LET YOUNG PEOPLE LIVE THEIR VALUES AND CREATE A NEW HISTORY

"I have options to live my values" is the way one focus group participant put it. And that comment was echoed by many other participants.

Making it easy to live in ways sensitive to the environment adds value to city living.

"It is environmentally friendly. It's easy to recycle, carpool, telecommute. It has biker friendly streets, parks."

"Save the river. Clean the river. Install bike lanes and recycling options."

"I have to take my recycling home to my parents. Offices here don't have recycling."

Having opportunities to live their values also allows young people to create a new history for their cities. In every city focus group participants expressed the view that their city was "not finished" and viewed this as an opportunity.

"Our generation is picking up this flag. Manifest destiny. The city is not finished. We can change it. The rewards are on merit, not the past. We are creating the history of the city as we go."

The ability to make a difference was widely appealing. This was a typical comment:

"There is great potential. There is opportunity if you have skills. You can be a big fish in a small pond."

"It's a small enough community that you could have a prominent role. There is really a big sense of frontier, possibility, that it's not finished... a place you could create something."

Not surprisingly, educated young people see potential where others might not.

"There is potential for enormous economic growth if you just take advantage of it."

"This city has a lot of potential. It's not Chicago or NYC. But it could be. There are 87 neighborhood groups, and they are all culturally diverse. It could be a cultural fusion."

In fact, some viewed adversity – in this case, unemployment – into opportunity to remake their city in positive ways.

"The city, even unemployment, is forcing people to do things differently, to figure out different ways of doing it. That contributes to one of the great things about the city: We have the highest percentage of small businesses per capita."

But standing in the way of their ability to create new history, some focus group participants felt, are long-time residents.

"There is an emerging group, ready to create the next chapter. But there is a big difference between the people who never left and the new people."



THEME SIX: BUILD VIBRANT PLACES

The need to build vibrant places was expressed in many different ways. Downtown was an important issue in every group.

"Downtown sucks. You can't live there, there are no restaurants, no train, no coffee shops. I can't live there."

"If we had a kick ass downtown, we'd get more people. If you provide a great downtown, we'd attract more people from big cities."

"The more you revitalize downtown, the more appealing this city will be."

"It's important to have a real downtown."

"Downtown is not yet healthy, and that hurts. In Belfast where I lived the neighborhoods are segregated, but the city center is where people come together. Here there is no center."

"There is not that much of a pulse here. In Charlotte there is an energy, a pulse."

"It would be easier to meet people in a downtown scene. It has to be easy to meet people. That's what keeps you in a place."

"You can't stumble on the fun."

But vibrancy also takes other forms. Many mentioned their desire for a city animated by its walkability and mixed uses which give people reasons to walk.

"I like living in mixed use. I can walk out my front door, and it's walkable. I like that access."

"I find that living in the Center City makes everything walkable."

"I wanted a city that is walkable." "I loved living downtown. I go walking at night. I never worried about it. It has a big city feel to it."

"I expected a cafe lifestyle. I expected to see people on the street, relaxed, walking their dogs."

"I felt the city had real districts. It is a walking city, which is unusual for the South. It had parks, character."

"Small communities are encouraged."

To supplement a city's walkability was the desire for mass transit. Again, this was an issue that was raised in every city, except one where mass transit functions extraordinarily well. Based on the comments of focus group participants, good public transit seems to be required for a city to be judged the complete package for this demographic.

"Mass transit is lacking. There are only two suburban lines. Boston is much smaller, but the subway goes everywhere."

"Public transportation is lacking. [This city] doesn't provide what the T would."

"Why is there no public transportation? The trolley is ridiculous."

"It's unique. We have fantastic transportation. Much bigger cities have no public transportation."

"It would be neat to have a public train. It will never happen. You can't even take the bus here."

Arts and civic festivals are also recognized as contributors to a city's vibrancy. And their presence reflects a city's character.

"The arts are a huge thing. They create civic pride. WaterFire, which I think is the best thing, creates beautiful images, with civic leaders rubbing elbows with everyone. It's diversity that turns into a real community. It is a very powerful thing."

"As an arts community, it's one of the top places in the country. Every band is moving to [this city]. It's insane. Labels keep moving here. There are more venues per capita than any other city."

"A lot of activities revolve around the arts."

"There are so many festivals – film, art, jazz, music, college. They give a sense of community, along with other contributors, like the farmer's market."

"I read about the Sarasota Film Festival [before I moved here]. That seemed like a national event that would attract hip, young people."

"Mature companies, like those in [this city], don't want to think outside the box. There is a lack of creativity in jobs, and that causes no arts, no sense of fun."

Food creates its own important scene in cities. The number and quality of restaurants, particularly independent restaurants, were mentioned repeatedly as vital contributors to the appeal of cities.

A vibrant downtown, plenty of people on the street and an active, varied cultural scene "reads" as dynamism, and a dynamic city means there is opportunity.

"The City needs to understand that if they want people like us, they need to build a dynamic city with different styles and different kinds of people."

THEME SEVEN: TAKE CARE OF THE BASICS

Some researchers have speculated that smart young people prefer “gritty cities” and are less attuned to issues of basic good government like clean and safe. But we found just the opposite.

Typical were these comments:

“It wouldn’t kill them to clean the streets.”

“It feels good when I see a clean city.”

“Walking around Central City at night feels unsafe. There are no police. It’s dark and eerie. Desolate. Suddenly, I’m in Shadyville with dark, dreary, old industrial buildings. I think, ‘What’s going on there?’”

They also want a government that works, that makes sense.

“There’s an easier way of life here. But it’s an interesting place to do business. A weird city. Getting licenses and permits is disorganized. You have to have patience. You have to run all over the place. Even though New York is big, and you’d think it would be disorganized, it’s not. You know what you have to do to get what you need.

“There’s an aura here about city government that you shouldn’t even try to change things here. ‘Don’t waste your time.’”

“We need to fire the government because it is resistant to change and young people. The city is old. There’s an old boys club. That’s just the way it is. Look at the change in D.C. from Marion Barry to Anthony Williams.”

And having the basics of life “work” is not just the job of government. The “niceness” of one’s fellow citizens also influences the quality of life.

“I thought of this city as a dark, dreary, gray, grumpy city, with grumpy people. It had a slushy, disgusting side.”

“I felt the same. People kept asking me, ‘Why go there?’ The city is nasty. People are nasty.”

“Drivers here are decent, courteous, the blinker means something, they give you a thank you wave, they don’t honk their horns. That was a pleasant surprise. How stressful your trip to work

is defines how pissed you will be for the rest of the day.”

And a little official and unofficial charm never hurts.

“There is a sense of humanity and humor. Even the park signs have quirky messages. The bike lane icons have braids, scarves. The Joan of Arc statue gets a hat and scarf during cold weather. It’s charming. It’s the kind of thing that you can typically find only in a small town.”



THEME EIGHT: BE THE BEST AT SOMETHING.

This one may be surprising. But focus group participants repeatedly called for their communities to be clear about what they wanted to be and to be the best at something. The fact that “this city is not the best in class in any field” was a source of some embarrassment for participants. Being best in class was viewed as a sign of sophistication, success, distinctiveness and leadership at work.

“[This city] can be challenging for people who want excellence in the people and institutions. It is not a world-class city.”

“The city needs to do one thing really well. It should be unique.”

Once a city has identified its best in class opportunity, participants then urged their cities to use it to their advantage by promoting their advantages. (While it is sometimes claimed that young people are skeptical of marketing, focus group participants urged their cities to use marketing to promote their assets.)

THEME NINE: SELL YOUR REGIONAL ASSETS

No matter how appealing the city, what is nearby matters. Participants again and again described the appeal of their cities, in part, in terms of the cities, the mountains, the water and the recreational activities they can access quickly.

"You can get outdoors easily. Only 20 minutes, and you're out in the country. It's easy to get to small town life."

"[What is most appealing about this city is] the proximity to D.C., the mountains and the beach."

"It has the culture and neighborhoods of a bigger city, but it feels small. It's close to bigger cities like Seattle and San Francisco."

"[The most appealing aspect of this city is that] it's centrally located. It's close to D.C., New York, the shore and Princeton."

"[This city] doesn't have weather extremes, but you are close to snow if you want it."

"The location. It's so close to everything. There is the ease of getting places."

"You can be a city girl, but a beach bum for a day if you live here."

"Its location in relation to Boston, beaches, New York, and Maine. If you want to live in the city and have access to a lot, this is the place."

"Emphasize accessibility – all that is within reach. But also emphasize how many good things there are to do in [this city]. You want [this city] to be something people want to be close to."

While the case is clear that regional assets sell, too many communities are locked into selling only their local assets because a regional approach is politically difficult or the financial mechanisms do not exist to support it.



THEME TEN: KNOW WHAT YOU WANT TO BE AND BE WILLING TO TAKE RISKS TO ACHIEVE IT

When asked, *"If your city were a car, what kind of car would it be?"* one woman gave it a moment of thought and answered, *"An El Camino. This city just doesn't know what it wants to be."*

Other participants complained about their city's leadership. One of the most striking comments heard during the 15 focus groups was this: *"What are our leaders willing to risk?"*

Interestingly, participants seemed to think that if a city was not in good condition, it was likely because its leaders wanted it that way. It is clear that leaders must communicate clearly their plans for improvements and their actions along the way. It is critical to show that leaders are working on the problems.



HOW THE YOUNG AND THE RESTLESS VIEW PORTLAND

PORTLAND'S SPECIAL STRENGTHS

- Metropolitan Portland focus group participants expressed the most positive views of their city among the five cities in which interviews were conducted.
- The urban fabric of the city has special appeal.
 - “It is completely not intimidating. Portland is a city with a great ring of neighborhoods around it. Getting to know the city was easy. I didn’t feel afraid to walk. It was inviting.”
 - “My initial sense was that it was a planned city, so you can figure out where you are. That sense is accommodating.”
 - “The city’s design feels intentional. It feels like people are designing the city on a human scale. Each neighborhood has its local pocket of activity. The city is designed to foster human activity.”
 - “The sense of place is fantastic on a consistent basis.”

- “I second that. You can be in the entire city.”

Several participants said Portland reminded them of a European city.

- Portland’s size, its urban fabric, walkability, public transportation, bike-friendly streets, cleanliness, distinctive neighborhoods, and independent businesses all contribute to a feeling of community, sophistication, manageability and safety.
 - “In Portland, you can create a community around you. You can live in a city and be part of a community, meet your friends at the coffee shop. There is good coffee, great beer, good wine. Small communities are encouraged.”
 - “It’s a great hybrid of a small town and a big city. It’s the best of both worlds. You can get a great dinner and somewhere to park.”
 - “I feel so safe here. I walk everywhere every hour.”



It's a community where participants felt they could have prominent roles and make a contribution.

- The city's and the region's natural assets add significantly to Portland's appeal. They not only add to its beauty, but they also provide easily accessible outdoor recreation opportunities, radical changes in climate and scenery, and a "clean, plush, green" environment. The area's compelling natural assets also help people lead a balanced life.
- Portland allows its citizens to "live their values," as with recycling, biking, and other "green" initiatives. Living a balanced life is also related to this same theme of living your values. In Portland, "there is an atmosphere of activism. It feels like the city has a social conscience. The city gives voice to issues that might go unheard in other cities." And many said, "I can make a difference in this city."
- Metropolitan Portland's political, business and social culture makes it easy for young people to be themselves. Portland is viewed as liberal and open-minded. As one put it, "You don't have to buy into the man." Another said, "People are able to tell their opinions. You feel free to express yourself." And this, "It's an incredible place to be oneself. It does allow one emotionally, physically and spiritually to have health."
- Portland's liberal culture sets the stage for participants believing that the city offers "a really big sense of frontier, of possibility, that it is not finished. Portland is a place where you can create something."
- Creativity is encouraged in Portland, and the creative scene is very open. As one woman put it, "Almost any one can find some level of support for their work. You can always find 10 people who will say, 'Good job.'" Another said, "You can go inside a room for three weeks and do your art." Portland was judged "to be a great place to create and play" (and also a "great place not to work").
- Coupled with the creative climate is Portland's independent, entrepreneurial climate. "People here are independent mavericks, not part of the machine," one said. Another said, "There is a strong entrepreneurial flavor here. It's embraced here. You can create your own opportunity. People are not limited here." The entrepreneurial spirit clearly extends beyond creating businesses. "Portland is a place where you can create your own life. It's not necessarily easy. There is not a pre-formed pattern, like in Dallas and in sales. The X-Y-Z is not as clear. It's hard but rewarding. It's your own." As one put it, "Here you have the ability to thrive in your own little world."
- The prevalence of independent businesses was named as an asset. "It feels so much more authentic when you have small independent businesses." And the relationships with independent business owners contribute to the feeling that Portland is a nice place where you can be recognized.
- There is an abundance of young people, and that attracts other young people.
- The view that Portland is an optimistic community was expressed in many ways, none more direct than this: "It's easy to connect with optimistic people."
- Portland's creative climate has been encouraged by the city's affordability (although some expressed concerns that the cost of living in Portland is rising).
- The region's "laid back" culture is appealing (although it can also be negative, in that people are not viewed to be as ambitious and demanding of excellence as they are in other markets).
- Part of being laid back is that "for the most part, people are nice, kind and polite."
- There is a wide variety of options of things to do. And "there are a lot of people around doing a lot of interesting things."
- There is a concentration of top companies in several industries, thus providing multiple options for employees as their careers develop.
- Portland's economic decline has produced an unusual reaction from focus group participants. They view themselves as resourceful survivors, the entrepreneurs who are reinventing their lives to meet new challenges. As one put it, "Half the people I know are leaving. Maybe it's the less resourceful ones." Another participant even explained the benefits of unemployment: "The city, even unemployment, is forcing people to do things differently, to figure out different ways of doing it. That contributes to one of the greatest things about the city: We have the highest percentage of small businesses per capita."

PORTLAND'S SPECIAL CHALLENGES

- It is difficult to recruit African-Americans to Portland, in part, because there are so few of them. Their absence is noted. "I miss the diversity of San Francisco. The white thing is a little much. I was walking around one day, and I thought, 'There's something weird about this place.' Then I realized everybody's white." Some participants talked about the racist history of Oregon as "pretty ugly" and noted the "long history of discrimination."
- Metropolitan Portland's climate of acceptance has a downside. A number of participants complained that people are not ambitious. "It's hard to be single, because people are not striving or ambitious. It's the 'womb syndrome.'"
- Another interpretation of "acceptance" is settling. And some thought Portland settled for mediocrity. Here's the way one participant expressed it: "Portland is not the best in class in almost any field."
- Yet another way "acceptance" is interpreted negatively is the seeming acceptance of "homeless" people, particularly young people. The presence of aggressive street people is "unexpected" in Portland, and therefore, stands out even more as a negative. It upsets the "charm" of Portland.
- One more way in which Portland's accepting, laid back attitude was viewed negatively by some participants is that it makes the city "a little bit sedated" and "not as vibrant." (However, others believed that "vibrant" was just the word to describe Portland.)
- The abundance of rain was mentioned negatively, more in terms of Portland's image than its reality. (But a number of participants suggested interesting "spins" on the rainy weather. One suggested that "rain can create a mood, like a French city. It can be romantic." Another said she spins Portland's weather as "snow and mountains." A former Southerner pointed out that "you can open up your windows in the summer and let in the fresh air. It's not like Florida where everything is air-conditioned and freezing." Another said, "Portland doesn't have weather extremes, but you are close to snow if you want. It's comfortable year-round." But Portland does have seasons, and "the transitions are nice." "The weather is perfect April to October, and there are no bugs, no humidity, and no snow." And perhaps the greatest benefit of the rain is the fact that "Portland is green all year round.")
- Some participants felt the cost of living in Portland is rising. One participant said, "I think the city has become a harder place to live. You used to be able to work 25 hours a week and spend the rest of your time volunteering or on your passion."
- The condition of Portland's schools was a serious concern to a number of participants. They viewed the school system as a fundamental component of Portland's success.
 - "There's a cosmetic thing going on. The city is focused on baseball leagues and ice skating rinks when the schools are crumbling."
 - "I echo that. We should make our K-16 school system 'state of the nation.' Think of all the resources available to help. Draw on the scientists, musicians to help."
 - "I agree with the school system. Unless it gets better, I won't be back to raise kids."
- Some felt there was not enough to do for the under-21 crowd and that the city was too concerned about young people behaving.



- The job market is weak.
- Participants felt the city could do a better job of marketing.
- Participants also felt the city could be more imaginative in generating additional revenue and problem solving. Instituting a sales tax and a more aggressive tourism strategy were two of the suggestions.
- One participant interpreted the urban growth boundary as an attempt by civic leaders “to keep Portland small.” This person’s feeling was that “the leadership is still old school, threatened by new energy and new companies.” (Others were quick to rebut that view, however.)
- Some participants complained that current leadership is not as bold as leaders of the past. “There are a lot of good things that happened in Oregon 30 years ago in a bipartisan spirit to protect the environment.” Another said, “The leaders need to take a stand. What have we done lately? Someone took a risk to move the freeway off the river. Portland used to have an edge. It is resting on its laurels. Its leaders are not willing to take a stand.”
- Some questioned whether Portland was just too good to be true. As one participant put it, “A lot of self-congratulatory stuff goes on here. Part of me asks, ‘Am I just kidding myself about being part of something special?’” And they warned against self-satisfaction. “Don’t become complacent with accolades. Do not discount ideas from California and Arizona. Good ideas can come from places we find abhorrent.”





ASSESSING PORTLAND'S PROGRESS:

A Statistical Portrait of the Young and Restless

INTRODUCTION

The objective of this analysis is to provide a detailed picture of the Portland region's young adult population: where it stood in 2000, how it had changed since 1990, and how Portland's standing and performance compared to other large metropolitan areas in the United States, with a special emphasis on those metros which Portland sees as competitors. Our statistical analysis compares the Portland-Salem Consolidated Metropolitan Statistical Area (CMSA), consisting of Clackamas, Columbia, Marion, Multnomah, Polk, Washington and Yamill Counties in Oregon, and Clark County, Washington, to other similar defined metropolitan areas throughout the nation.

The young adult population, which we define for purposes of this analysis as persons between 25 and 34 years of age, plays a particularly important role in shaping metropolitan economic growth and prosperity. The mid-20s and early 30s represent an age when most persons

have completed their formal education, have started pursuing careers (or developing a formative work history) and are finding partners and starting families. While persons in their early 20s—particularly those with a four-year degree or higher level of education—are the most mobile age group in our society, the likelihood of moving to another state or metropolitan area declines sharply as people move into their early 30s. Consequently, the best opportunity to attract the population that will provide the workforce—the human capital—for a region's economic future is when those persons are young adults.

The importance of the young adult population to metropolitan economic health has been thrown into sharp relief by the major demographic change sweeping the nation—the aging of the Baby Boom generation. Slightly more than a decade ago, when the 1990 census was conducted, the tail end of the Baby Boom generation (persons born between 1956 and 1965) were between 25 and 34 years of age. In 2000, these Boomers had moved into the 35 to 44 age group.

Those who followed—persons born between 1966 and 1975—were part of a much smaller birth cohort, the so-called Baby Bust. Even augmented by substantial immigration, the number of persons aged 25 to 34 in 2000 was far less—nationally nearly 4 million less—than the number of 25 to 34 year-olds a decade earlier. This means that the nation's metropolitan areas were competing for a smaller pool of young adults in 2000 than they were in 1990.

This analysis shows how the distribution of this young adult population changed between 1990 and 2000, and how Portland fared in attracting its share of this mobile and economically important group. As we shall see, the geographic distribution of this age group was influenced by an array of factors, including the changing race and ethnicity of young adults, variations in underlying regional and metropolitan growth trends, and the differential attractiveness of metropolitan areas to young adults.





1

OVERVIEW OF AGE STRUCTURE AND POPULATION TRENDS

The focus of our analysis is the metropolitan population of the United States, and in particular the changes in population in the nation's 50 largest metropolitan areas, including all metro areas with populations of one million or more in 2000.

Collectively the nation's metropolitan areas accounted for 80.3 percent of the U.S. population, and the 50 largest metro areas accounted for 57.7 percent. Young adults are disproportionately concentrated in metropolitan areas, particularly larger metropolitan areas. Some 83.0 percent of those aged 25 to 34 lived in metropolitan areas; 61.6 percent of all 25 to 34 year-olds lived in the 50 most populous metropolitan areas. In 2000, 32.8 million 25 to 34 year-olds lived in metro areas, and 24.4 million lived in the 50 largest metropolitan areas.

The 2000 Census showed that these 32.8 million 25 to 34 year-olds in the metropolitan United States represented about 14.5 percent (roughly one in seven) of the nation's total metropolitan population of nearly 226 million people. In Metropolitan Portland, in 2000, there were about 345,000 25 to 34 year-olds, who made up about 15.2 percent of the metropolitan areas population of slightly less than 1 million.

Table 1:
TOTAL POPULATION AND
25-34 POPULATION, 2000

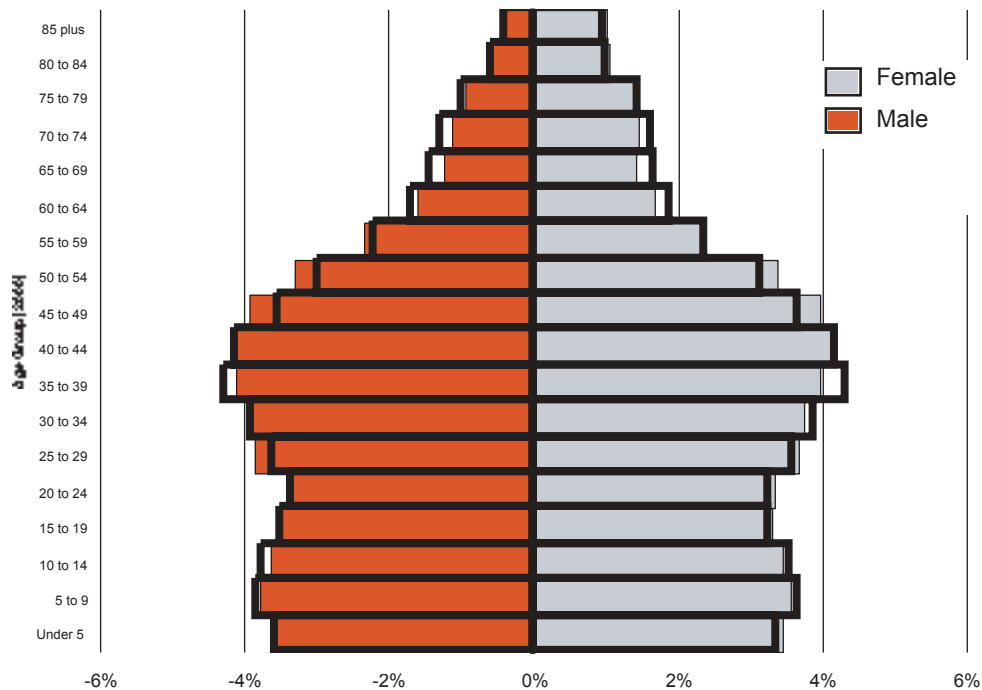
	Metro US	Portland
Total Population	225,981,711	2,265,223
25-34 Population	32,864,383	345,187
Percent 25-34	14.5%	15.2%

The change in the population of any age group in a metropolitan area is the product of a number of factors, including national demographic changes (the different sizes of successive birth cohorts) as well as migration.

The age structure of different metropolitan areas can be summarized in a population pyramid that shows the fraction of the total population in each of a series of age/sex groups. The youngest generation is shown at the bottom of the chart, the oldest at the top. Figure 1 shows the population pyramid for Portland in 2000.

Figure 1:
AGE-SEX DISTRIBUTION, 2000

Age Pyramid, 2000



The pyramid illustrates the age-sex distribution of the population compared to the metropolitan United States. Data for Portland are shown in the shaded bars, values for the U.S. are outlined in bold. Data to the right of the axis are for females, data to the left are for males. In general, Portland's age distribution closely follows the typical pattern for the nation's metropolitan areas, with three exceptions. The region is somewhat over-represented in the persons in their late 40s and early 50s (especially women) and somewhat under-represented in persons in their late 30s, especially women. Finally, Portland has slightly fewer older adults, especially women between 60 and 74 and men 65 to 74.





2 CHANGE IN THE 25 TO 34 YEAR-OLD POPULATION, 1990 TO 2000

Our primary focus in this report is the change in the geographic distribution of the young adult population in the United States between 1990 and 2000. It is helpful here to start our analysis by reviewing the broad changes in population in the metropolitan U.S. and in the Portland area.

Overall, the metropolitan population of the United States increased by nearly 14 percent from 1990 to 2000, growing from about 198 million to nearly 226 million in 2000. Population growth in Metropolitan Portland closely paralleled the national trend. The metropolitan area grew 15.1 percent, with total population growing by nearly 473,000 (to 2,265,223 in 2000).

At the national level, the number of persons aged 25 to 34 in the U.S. actually declined during the decade of the 1990s—primarily due to the movement of the Baby Boom generation into an older age group over the course of the decade. The number of 25 to 34 year-olds in the nation's metropolitan areas declined by almost 3 million between 1990 and 2000: from 35.9 million in 1990 to 32.9 million in 2000. Portland was an exception to this national trend -- between 1990, Portland's 25 to 34 year-old population increased by 37,400.

The aging of the baby boom generation is readily apparent when we look at the change in the age distribution of the population between 1990 and 2000. Figure 2 shows the percentage of the Portland population in each of 17 five-year age groups in both 1990 and 2000. In

Table 2:
TOTAL POPULATION AND 25-34
POPULATION, 1990 AND 2000

Total Population

Year	Metro US Number	Portland Number	Share of US
1990	198,402,494	1,793,476	0.90%
2000	225,981,711	2,265,223	1.00%
Change	27,579,217	471,747	0.10%
Growth (%)	13.9%	26.3%	

25 to 34 Year Old Population

Year	Metro US Number	Portland Number	Share of US
1990	35,855,275	307,793	0.86%
2000	32,864,383	345,187	1.05%
Change	(2,990,892)	37,394	0.19%
Growth (%)	-8.3%	12.1%	

1990, the largest age groups were those aged 30 to 34 and 35 to 39, each with about 9 percent of the metropolitan area's population. In 2000, the two largest age

Figure 2:
CHANGE IN POPULATION BY AGE
GROUP, 1990-2000

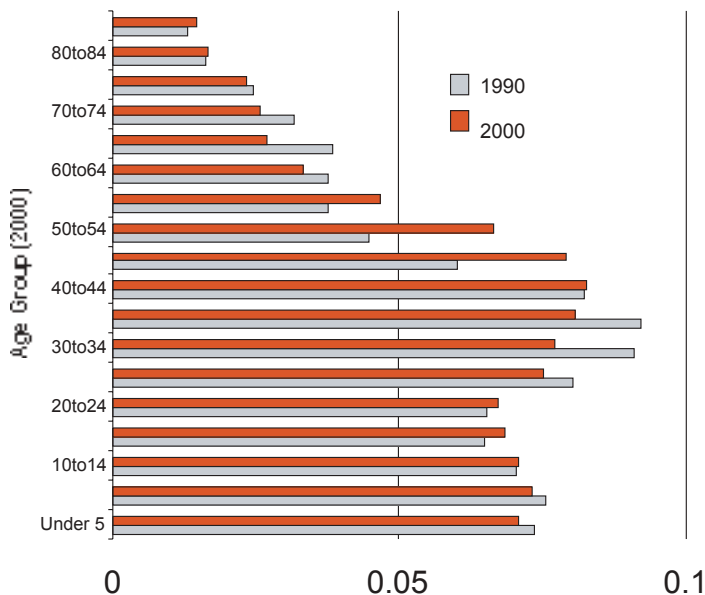


Table 3:

METROPOLITAN GROWTH

Metro Areas Ranked by Percentage Change in Total Population (All ages) 1990-2000

Leading Metros

Rank	Metropolitan Area	Percent
1	Las Vegas, NV-AZ MSA	83%
2	Austin-San Marcos, TX MSA	48%
3	Phoenix--Mesa, AZ MSA	45%
4	Atlanta, GA MSA	39%
5	Raleigh-Durham-Chapel Hill, NC MSA	39%

Benchmark Metros

2	Austin--San Marcos, TX MSA	48%
3	Phoenix--Mesa, AZ MSA	45%
5	Raleigh--Durham--Chapel Hill, NC MSA	39%
8	Denver--Boulder--Greeley, CO CMSA	30%
11	Portland--Salem, OR--WA CMSA	26%
19	Seattle--Tacoma--Bremerton, WA CMSA	20%
31	San Diego, CA MSA	13%

Lowest Metros

46	Rochester, NY MSA	3%
47	Cleveland--Akron, OH CMSA	3%
48	Hartford, CT MSA	2%
49	Pittsburgh, PA MSA	-2%
50	Buffalo-Niagara Falls, NY MSA	-2%

groups were those 35 to 39 and 40 to 44, with about 8 percent each of the metropolitan area's population.

Overall population growth varied dramatically among U.S. metropolitan areas during the 1990s. Some metropolitan areas, mostly in the South and West, grew rapidly, while others, primarily in the North and East, grew slowly or actually declined. During the decade of the 1990s, Portland's growth level was well above the median, ranking 11th overall among the nation's 50 largest metropolitan areas. Portland's competitor regions were among the fastest growing in the nation, with four (Phoenix, Austin, Denver and Raleigh-Durham) in the top 10. San Diego and Seattle grew more slowly during the 1990s.

There is considerable variation among metropolitan

Table 4:

YOUNG ADULT POPULATION

Share of the Population 25 to 34, 2000

Leading Metros

Rank	Metropolitan Area	Percent
1	Austin--San Marcos, TX MSA	18.2%
2	Atlanta, GA MSA	17.6%
3	Raleigh--Durham--Chapel Hill, NC MSA	17.5%
4	Dallas--Fort Worth, TX CMSA	16.8%
5	Charlotte--Gastonia--Rock Hill, NC--SC MSA	16.6%

Benchmark Metros

1	Austin--San Marcos, TX MSA	18.2%
3	Raleigh--Durham--Chapel Hill, NC MSA	17.5%
6	Denver--Boulder--Greeley, CO CMSA	16.4%
10	Phoenix--Mesa, AZ MSA	15.7%
13	San Diego, CA MSA	15.5%
15	Seattle--Tacoma--Bremerton, WA CMSA	15.4%
18	Portland--Salem, OR--WA CMSA	15.2%

Lowest Metros

46	Rochester, NY MSA	12.8%
47	Tampa--St. Petersburg--Clearwater, FL MSA	12.7%
48	Buffalo--Niagara Falls, NY MSA	12.3%
49	Pittsburgh, PA MSA	12.1%
50	West Palm Beach--Boca Raton, FL MSA	11.6%

Table 5:

CHANGE IN YOUNG ADULT POPULATION

Change in 25-34 Population, 1990 to 2000

Leading Metros

Rank	Metropolitan Area	Percent
1	Las Vegas, NV-AZ MSA	55.7%
2	Austin-San Marcos, TX MSA	27.8%
3	Phoenix-Mesa, AZ MSA	23.7%
4	Atlanta, GA MSA	20.9%
5	Raleigh-Durham-Chapel Hill, NC MSA	20.0%

Benchmark Metros

2	Austin--San Marcos, TX MSA	27.8%
3	Phoenix--Mesa, AZ MSA	23.7%
5	Raleigh--Durham--Chapel Hill, NC MSA	20.0%
8	Portland--Salem, OR--WA CMSA	12.1%
9	Denver--Boulder--Greeley, CO CMSA	9.7%
17	Seattle--Tacoma--Bremerton, WA CMSA	-3.5%
38	San Diego, CA MSA	-13.5%

Lowest Metros

46	Norfolk-Virginia Beach--Newport News, VA-NC MSA	-21.5%
47	Rochester, NY MSA	-23.8%
48	Pittsburgh, PA MSA	-24.8%
49	Hartford, CT MSA	-26.3%
50	Buffalo-Niagara Falls, NY MSA	-26.5%

areas in the fraction of their population that is between 25 and 34 years of age. Among the 50 largest metropolitan areas in 2000, 15 percent of the population was between 25 and 34. As Table 4 illustrates, five metropolitan areas in the South, including Atlanta, Raleigh-Durham, Dallas and Charlotte, lead the list with the largest share of the population aged 25 to 34. The bottom of the list is composed of very slowly growing or declining cities in the Northeast (Rochester, Buffalo and Pittsburgh) and two Florida metropolitan areas with large retirement populations (Tampa and West Palm Beach). Portland ranks 18th of the 50 metropolitan areas in the share of its population aged 25 to 34. Portland lags behind all of its competitor metros on this index. Austin is first and Raleigh-Durham ranks third in the share of their population between 25 to 34 years of age. Denver and Phoenix are both in the top 10, and Seattle and San Diego have slightly larger fractions of young adults in

their population.

Between 1990 and 2000, the number of 25 to 34 year-olds in the U.S. declined by nearly 3 million. As a result, most metropolitan areas lost population in this age group. There was, however, considerable variation among metropolitan areas. About a third of the 50 largest metropolitan areas saw increases in their 25 to 34 year-old population between 1990. Several metropolitan areas saw declines in their 25 to 34 year-old population of more than 20 percent.

Portland ranked 8th of the 50 largest metropolitan areas in the percentage change in the 25 to 34 year-old population, with an increase of 12.1 percent between 1990 and 2000. Its competitor regions turned in varied performances. Three were in the top five (Austin, Raleigh-Durham and Phoenix), and Denver joined Portland in the top 10. Seattle and San Diego both recorded declines in their young adult population, with San Diego's decrease being more severe than average.





3

CHANGING FACES, CHANGING PLACES:

Race and Ethnicity of the 25 to 34 Year-Old Population, 1990 and 2000

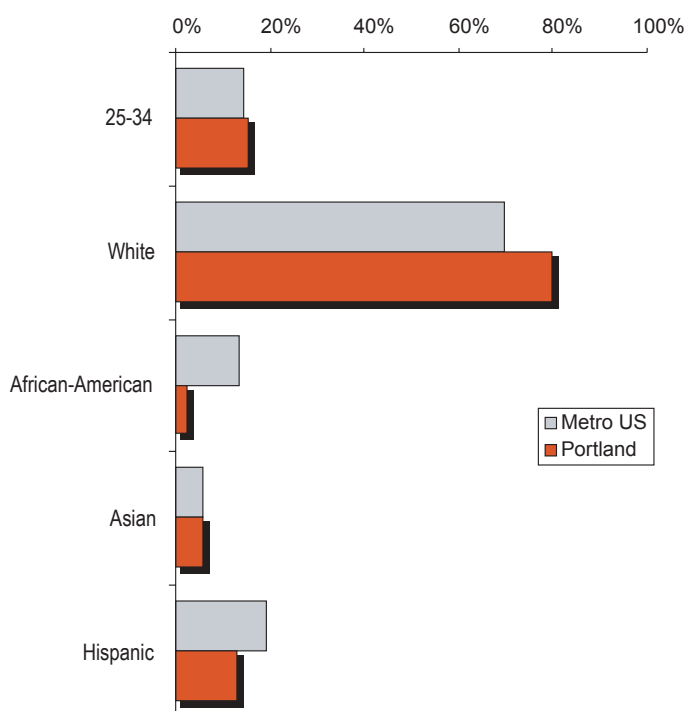
So far, we have examined the 25 to 34 year-old age group solely on the basis of age. But this group is, of course, composed of individuals in a variety of racial and ethnic groups. Every metropolitan area has a different racial and ethnic composition.

As Figure 3 illustrates, the racial and ethnic composition of Metropolitan Portland's young adult population differs in many ways from the average of U.S. metropolitan areas. In 2000, a much smaller fraction of the 25 to 34 year-old population was African-American and larger fraction white. Asians make up a similar share of Portland's young adult population as in large metropolitan areas; Hispanics make up a somewhat smaller share of the Portland population.

The racial and ethnic composition of U.S. metropolitan areas has shifted over the past decade. Some sub-groups of the 25 to 34 year-old population (notably Hispanics and Asian-Americans) have increased significantly and are also considerably more dispersed among metropolitan areas. Other sub-groups (the white and African-American population) have decreased substantially in number.

Over the past decade, there have been important shifts in the racial and ethnic composition of the U.S. population, and they have been especially pronounced in the 25 to 34 year-old age group. To fully understand the

Figure 3:
DEMOGRAPHIC PROFILE



dynamics of the changing age structure of the young adult population, it is important to consider each of these racial and ethnic groups separately.

Our task is complicated by fundamental changes made by the Census Bureau in the manner in which it asked citizens to identify their race between the 1990 and 2000 Censuses. In 1990, the Census required respondents to choose a single racial category. In 2000, the Census gave respondents the opportunity to identify themselves as belonging to two or more racial groups. Consequently, data for 1990 and 2000 are not directly comparable.

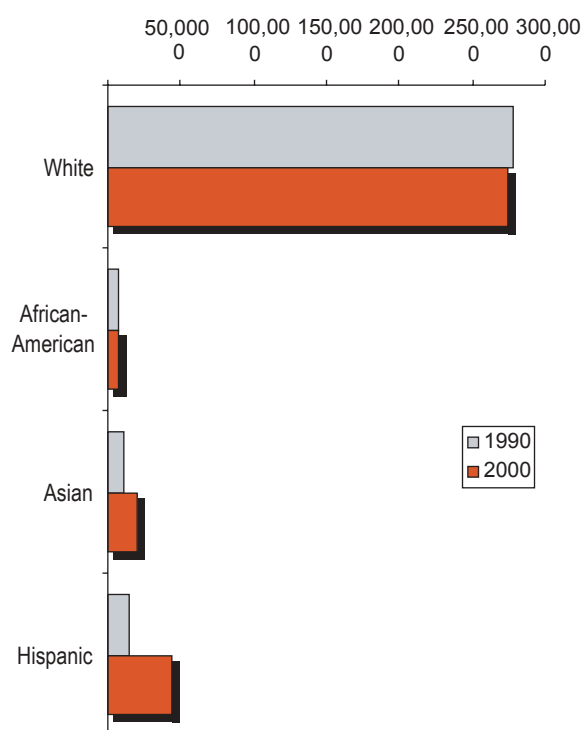
We have dealt with this definitional change in two ways. First, we have compared the 1990 data with the most closely similar 2000 data for persons identifying themselves as belonging to a single racial category. (Despite the option to choose two or more races, the overwhelming proportion of respondents chose a single race). Because these numbers are not comparable, we have described these comparisons as the “indicative change” in the racial groups shown. Second, we have examined the changes in the share of the U.S. population in various racial groups in each U.S. metropolitan area. This “market share” notion compares a region’s share of the total U.S. population in one racial category in 1990 with its market share of the most similar racial category in 2000. The market share approach shows whether a region accounted for a greater or larger share of all of the persons identifying themselves as belonging to a racial group in 2000 than the most similarly defined group in 1990.

Our analysis focuses on the three largest broad racial groupings in the Census: whites, African-Americans and Asians. Our analysis excludes Native Americans and for 2000, mixed race individuals. We also separately report

There were significant differences across racial and ethnic lines in the change in the 25 to 34 year-old population between 1990 and 2000. In Portland, the white and African-American 25 to 34 year-old population remained roughly stable and there were significant increases in the Asian and Hispanic 25 to 34 year-old population.

Figure 4:

DEMOGRAPHIC CHANGE



Although the Portland area’s young adult population remained predominantly white, there was a substantial growth in other racial and ethnic groups during the 1990s. As Figure 5 illustrates, Asian and Hispanic groups increased, and these increases more than offset the small decline in the white young adult population.

Although the overall pattern of change in Portland resembles that found nationally, Portland fared better in each ethnic and racial group. Metropolitan Portland’s decline in the white population was smaller, its African-American population increased (while the nation’s decreased), and its increases in Asian and Hispanic young adults were larger than in the nation’s other large metropolitan areas.

Again, inasmuch as the figures shown for 1990 and 2000 in Table 6 are not directly comparable, we present an alternative way at looking at the changing racial and ethnic composition of the 25 to 34 year-old population. Table 7 shows the share of the U.S. metropolitan population residing in the Portland area in 1990 by racial and

Table 6:

SUMMARY OF CHANGES IN KEY DEMOGRAPHIC GROUPS, 1990-2000

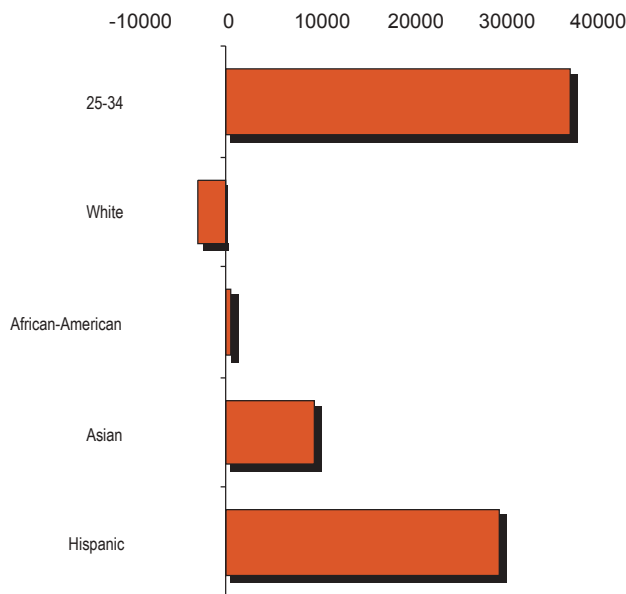
Portland

	1990	2000	Change	Percent
White	278,143	275,034	(3,109)	-1%
African-American	7,839	8,220	381	5%
Asian	10,934	20,572	9,638	88%
Hispanic	14,700	44,436	29,736	202%

Note: Racial categories changed between 1990 and 2000, 2000 is white, single-race only. 2000 data is one race only for white, African-American and Asian.

data for persons of Hispanic origin, who can be of any race. For simplicity, we use an abbreviated description of each racial and ethnic category: African-American includes persons describing themselves as Black and African-American; Asian, includes Asians and Pacific Islanders; and Hispanic includes Mexican, Puerto Rican, Cuban or other Spanish.

Figure 5:
DEMOGRAPHIC CHANGE



ethnic group and the change in the share for each group between 1990 and 2000. In 1990, Portland accounted for about 0.904 percent of the total U.S. metropolitan population. This increased to about 1.002 percent of the total U.S. population in 2000, for an increase in share of 0.098 percent. Metropolitan Portland's share of 25 to 34 year-olds increased 0.192 percent—twice as fast as the overall increase in share. Thus Portland has been growing relatively faster than the nation's other metropolitan areas (increasing its market share) and this increase is lead by its increasing market share of the 25 to 34 year-old age group.

The market share figures for different race and ethnic categories show that while Portland's market share for 25 to 34 year-old whites was similar to the overall shift for this age group, the performance varied for other demographic groups. Portland had a much smaller gain in market share for African-American young adults and much larger increases in market share for Asians and Hispanics. These trends underscore unevenness of Portland's

Table 7:
SHIFT IN SHARE OF US METROPOLITAN
POPULATION, 1990 TO 2000

	1990	2000	Shift
All Ages	0.904%	1.002%	0.098%
25/34s	0.858%	1.050%	0.192%
White	1.005%	1.198%	0.193%
African-American	0.166%	0.185%	0.019%
Asian	0.813%	1.082%	0.270%
Hispanic	0.362%	0.697%	0.335%

diversity—strongly gaining share among Asians and Hispanics, but much weaker growth in African-American young adults.

WHITE POPULATION

Among the 25 to 34 year-old population in Portland, the single largest racial group is whites. In 1990, 90.4

Figure 6:
POPULATION CHANGE

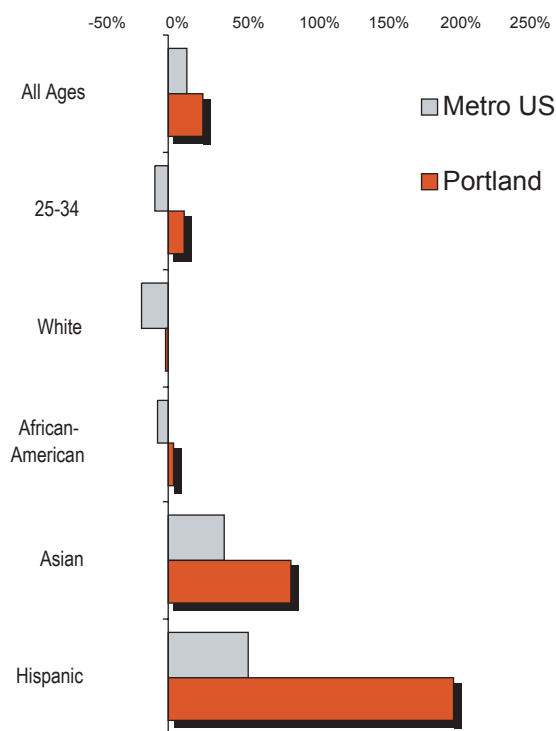


Table 8:
WHITE 25-34 POPULATION, 1990 AND 2000

	Number		Percent of 25/34 Population	
	Metro US	Portland	Metro US	Portland
1990	27,669,194	278,143	77.2%	90.4%
2000	22,955,060	275,034	69.8%	79.7%
Change	(4,714,134)	(3,109)		
Growth (%)	-17.0%	-1.1%		

Note: Racial categories changed between 1990 and 2000, 2000 is white, single-race only.

percent of Portland's 25 to 34 year-old population described themselves as white; in 2000, 79.7 percent of the population described themselves as white, single-race. The share of Portland's 25 to 34 year-old population that was white was higher than for U.S. metropolitan areas in both 1990 and 2000. The indicative change in the white 25 to 34 year-old population in Portland between 1990 and 2000 was much less (-1.1 percent) than the overall change in the white 25 to 34 year-old population national-ly (-17.0 percent).

Among the 50 most populous metropolitan areas, the fraction of the 25 to 34 year-old population that was white, single-race in 2000 varied from about 50 percent in Los Angeles to 88 percent in Pittsburgh. Portland ranks 12th among the 50 largest U.S. metropolitan areas in the share of the population white, single-race. Portland's white young adult population ranks higher than

Figure 7:

WHITE 25-34 POPULATION, 2000

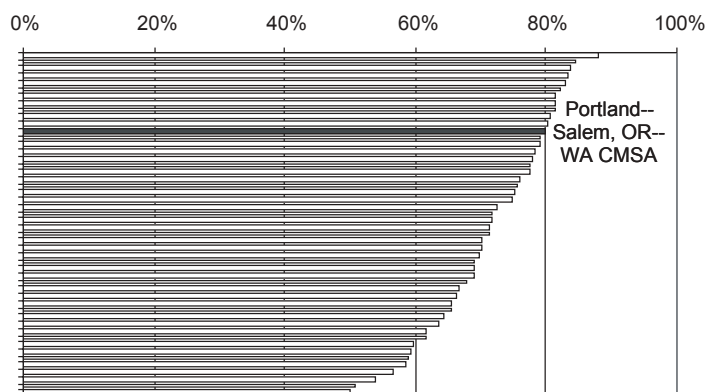


Table 9:

WHITE SINGLE RACE POPULATION, 2000

Share of 25-34 Population, White, One Race, 2000

Leading Metros

Rank	Metropolitan Area	Percent
1	Pittsburgh, PA MSA	88.0%
2	Salt Lake City-Ogden, UT MSA	84.6%
3	Cincinnati-Hamilton, OH-KY-IN CMSA	83.8%
4	Providence-Fall River-Warwick, RI-MA MSA	83.4%
5	Minneapolis-St. Paul, MN-WI MSA	83.0%

Benchmark Metros

12	Portland--Salem, OR--WA CMSA	79.7%
17	Denver--Boulder--Greeley, CO CMSA	77.7%
19	Seattle--Tacoma--Bremerton, WA CMSA	75.9%
25	Phoenix--Mesa, AZ MSA	71.7%
32	Austin--San Marcos, TX MSA	69.1%
35	Raleigh--Durham--Chapel Hill, NC MSA	66.8%
41	San Diego, CA MSA	61.6%

Lowest Metros

46	Houston-Galveston-Brazoria, TX CMSA	58.6%
47	New Orleans, LA MSA	56.4%
48	San Francisco-Oakland-San Jose, CA CMSA	53.7%
49	Memphis, TN-AR-MS MSA	50.9%
50	Los Angeles-Riverside-Orange County, CA CMSA	50.2%

Table 10:

INDICATIVE CHANGE IN WHITE POPULATION, 1990-2000

Change in White 25-34 Population, 1990-2000

Leading Metros

Rank	Metropolitan Area	Percent
1	Las Vegas, NV-AZ MSA	33.1%
2	Austin-San Marcos, TX MSA	16.8%
3	Raleigh-Durham-Chapel Hill, NC MSA	9.2%
4	Phoenix-Mesa, AZ MSA	7.2%
5	Charlotte-Gastonia-Rock Hill, NC-SC MSA	6.6%

Benchmark Metros

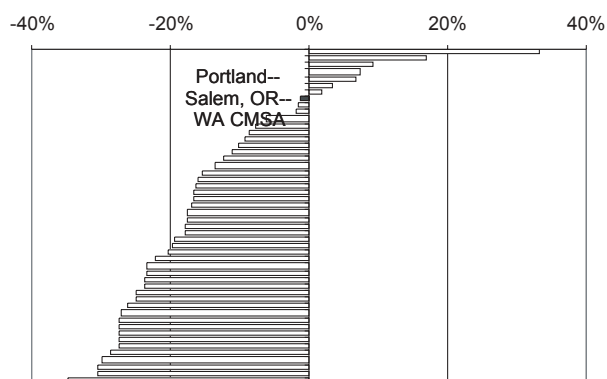
2	Austin--San Marcos, TX MSA	16.8%
3	Raleigh--Durham--Chapel Hill, NC MSA	9.2%
4	Phoenix--Mesa, AZ MSA	7.2%
8	Portland--Salem, OR--WA CMSA	-1.1%
9	Denver--Boulder--Greeley, CO CMSA	-1.4%
19	Seattle--Tacoma--Bremerton, WA CMSA	-15.2%
42	San Diego, CA MSA	-27.4%

Lowest Metros

46	Los Angeles-Riverside-Orange County, CA CMSA	-28.6%
47	Rochester, NY MSA	-29.9%
48	Buffalo-Niagara Falls, NY MSA	-30.4%
49	Norfolk-Virginia Beach-Newport News, VA-NC MSA	-30.4%
50	Hartford, CT MSA	-34.8%

Figure 8:

INDICATIVE CHANGE IN WHITE 25-34 POPULATION, 1990-2000



all of its competitors (although Denver and Seattle are only slightly lower on this measure). Austin, Raleigh-Durham and San Diego rank below the median in white population.

Less than a fifth of the largest 50 metropolitan areas had a white, single-race 25 to 34 year-old population in 2000 that was more numerous than the white 25 to 34 year-old population in 1990. On this indicator, Portland saw a 1.1 percent decline, i.e., there were 1.1 percent fewer persons aged 25 to 34 classified as white, single-race in 2000 than were classified as white, aged 25 to 34 in 1990. Portland ranked 8th among the top 50 metropolitan areas on this indicator. It lagged behind Austin, Raleigh-Durham and Phoenix—all of which recorded increases in their white young adult population. Denver's decline was nearly the same as Portland's; Seattle and especially San Diego had larger apparent declines.

HISPANIC POPULATION

Between 1990 and 2000, the number of young adult Hispanics in the metropolitan U.S. increased dramatically from 4 million to nearly 6.4 million. Hispanics accounted for about 11 percent of the metropolitan 25 to 34 year-old population in 1990, but nearly 20 percent of the metropolitan 25 to 34 year-old population in 2000.

The growth of the Hispanic population in Portland exceeded the national trend; Hispanic 25 to 34 year-olds increased 202 percent from about 14,700 in 1990 to about 44,400 in 2000. The proportion of the young adult population that is Hispanic in Portland (12.9 percent) is about two-thirds the proportion of Hispanics in the nation's metropolitan areas (19.4 percent).

Despite the rapid increase in the Hispanic population, there is considerable variation in the share of the population that is Hispanic among U.S. metropolitan areas. A majority of the 25 to 34 year-old population is Hispanic in

Table 11:

HISPANIC 25-34 POPULATION, 1990 AND 2000

	Number		Percent of 25/34 Population	
	Metro US	Portland	Metro US	Portland
1990	4,060,295	14,700	11.3%	4.8%
2000	6,372,589	44,436	19.4%	12.9%
Change	2,312,294	29,736		
Growth (%)	56.9%	202.3%		

Note: Hispanic persons can be of any race.

Table 12:

HISPANIC POPULATION, 2000

Share of 25-34 Population Hispanic, Any Race, 2000

Leading Metros

Rank	Metropolitan Area	Percent
1	San Antonio, TX MSA	55.3%
2	Los Angeles--Riverside--Orange County, CA CMSA	47.6%
3	Miami--Fort Lauderdale, FL CMSA	45.6%
4	Houston--Galveston--Brazoria, TX CMSA	35.4%
5	San Diego, CA MSA	31.3%

Benchmark Metros

5	San Diego, CA MSA	31.3%
6	Phoenix--Mesa, AZ MSA	31.1%
7	Austin--San Marcos, TX MSA	29.1%
12	Denver--Boulder--Greeley, CO CMSA	21.8%
19	Portland--Salem, OR--WA CMSA	12.9%
24	Raleigh--Durham--Chapel Hill, NC MSA	9.3%
33	Seattle--Tacoma--Bremerton, WA CMSA	7.2%

Lowest Metros

46	Columbus, OH MSA	2.6%
47	Louisville, KY--IN MSA	2.4%
48	St. Louis, MO--IL MSA	2.1%
49	Cincinnati--Hamilton, OH--KY--IN CMSA	1.6%
50	Pittsburgh, PA MSA	1.0%

San Antonio, and Hispanics are approaching a majority of this age group in two other metropolitan areas—Los Angeles and Miami. In most of the 50 largest U.S. metropolitan areas, less than 10 percent of the 25 to 34 year-old population is Hispanic, with the smallest concentrations of Hispanic population found in Pittsburgh, St.

Figure 9:
HISPANIC 25-34 POPULATION, 2000

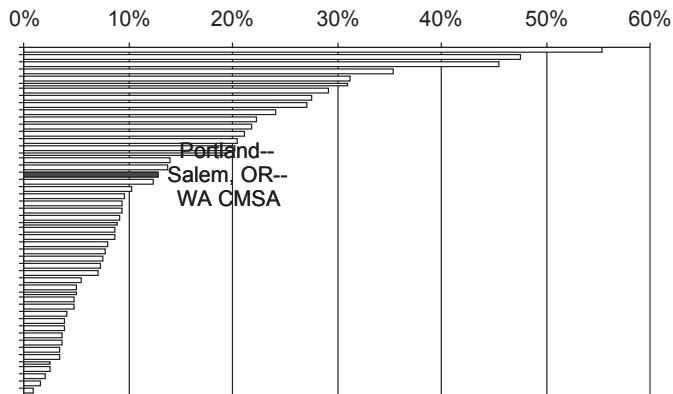


Figure 10:
CHANGE IN HISPANIC 25-34
POPULATION. 2000

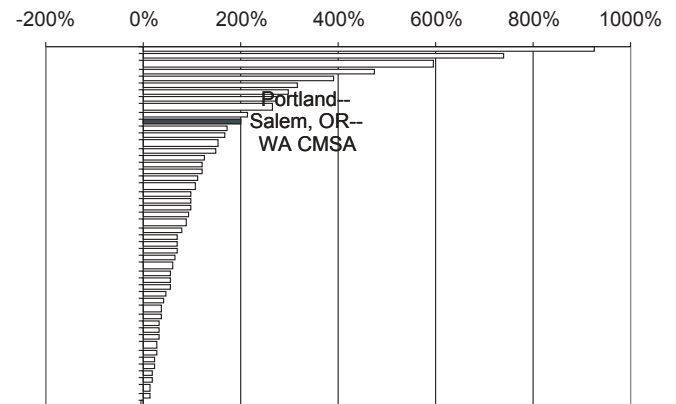


Table 13:
CHANGE IN HISPANIC POPULATION,
1990-2000
Increase in 25 to 34 Year Old Hispanic Population

Leading Metros		
Rank	Metropolitan Area	Percent
1	Greensboro--Winston-Salem--High Point, NC MSA	926.8%
2	Charlotte--Gastonia--Rock Hill, NC--SC MSA	740.9%
3	Raleigh--Durham--Chapel Hill, NC MSA	595.5%
4	Nashville, TN MSA	475.7%
5	Atlanta, GA MSA	390.8%
Benchmark Metros		
3	Raleigh--Durham--Chapel Hill, NC MSA	595.5%
11	Portland--Salem, OR--WA CMSA	202.3%
17	Phoenix--Mesa, AZ MSA	122.5%
19	Seattle--Tacoma--Bremerton, WA CMSA	111.6%
25	Denver--Boulder--Greeley, CO CMSA	90.7%
27	Austin--San Marcos, TX MSA	71.6%
42	San Diego, CA MSA	28.1%
Lowest Metros		
46	Buffalo--Niagara Falls, NY MSA	20.2%
47	Pittsburgh, PA MSA	19.6%
48	San Antonio, TX MSA	14.2%
49	Norfolk--Virginia Beach--Newport News, VA--NC MSA	13.8%
50	New Orleans, LA MSA	-3.1%

Louis, Louisville, Columbus and Cincinnati.

In 2000, about 12.9 percent of Portland's 25 to 34 year-old population was Hispanic, ranking the region 19th among the 50 largest metropolitan areas in this measure. Three of Portland's competitors have a particularly large concentration of Hispanic young adults; San Diego, Phoenix and Austin ranked fifth, sixth and seventh, each with about 30 percent Hispanic young adults. Portland lags well behind Denver but substantially ahead of Raleigh-Durham and Seattle.

The Hispanic population aged 25 to 34 increased in 49 of the 50 largest metropolitan areas between 1990 and 2000—the sole exception being New Orleans, which registered a slight decline. Many metropolitan areas with previously small numbers of Hispanic residents registered the largest percentage increase. Five Southern metros (including Portland competitor Raleigh-Durham) ranked among the top five in the percentage increase in Hispanic population aged 25 to 34, with increases of several hundred percent (although from a very small base). Portland's increase of 202 percent ranked 11th, ahead of all of its competitor regions except Raleigh-Durham.

AFRICAN-AMERICAN POPULATION

In 2000, there were about 4.4 million African-American, single-race 25 to 34 year-olds in the metropolitan areas of the United States. This represented a number about 6 percent smaller than the number of African-American 25 to 34 year-olds in 1990 in metropolitan areas (although the racial definitions were different in that year). African-Americans represented about 13.1 percent of the 25 to 34 year-old metropolitan population in 1990; African-American, single-race 25 to 34 year-olds represented about 13.5 percent of the U.S. metropolitan population in 2000.

African-Americans make up about one-fifth as large a fraction of the 25 to 34 year-old population in Portland (2.4 percent) than in the metropolitan U.S. as a whole

Table 14:

AFRICAN-AMERICAN 25-34 POPULATION, 1990 AND 2000

	Number		Percent of 25/34 Population	
	Metro US	Portland	Metro US	Portland
1990	4,708,840	7,839	13.1%	2.5%
2000	4,433,712	8,220	13.5%	2.4%
Change	(275,128)	381		
Growth (%)	-5.8%	4.9%		

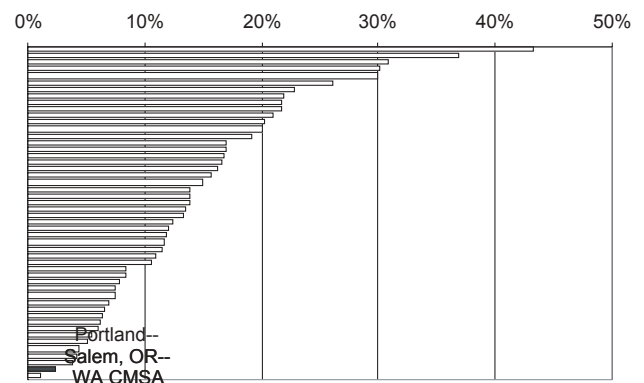
Note: Racial categories changed between 1990 and 2000, 2000 is African-American, single-race only.

(13.5 percent). The African-American population in this age group in Metropolitan Portland increased about 5 percent at a time when the comparable change in the population group nationally was a decline of almost 6 percent.

The proportion of the population classifying themselves as black or African-American varies substantially

Figure 11:

AFRICAN-AMERICAN 25-34 POPULATION, 2000



among U.S. metropolitan areas. The proportion of the 25 to 34 year-old population identified as black or African-American ranges from 30 percent or more in a number of Southern metropolitan areas to less than four percent in several Western metropolitan areas.

Portland ranks 49th of the nation's 50 largest metropolitan areas in the percentage of its 25 to 34 year-old population identified as African-American, single-race in the 2000 Census (only Salt Lake City has a smaller fraction of African-American young adults). Most of its competitor regions keep close company—Denver and Phoenix are also in the bottom five, San Diego and Seattle rank 43rd and 45th, and Austin is also well below the median at 38th. Among competitor regions, only Raleigh-Durham ranks above median (10th) with 21.7 percent African-Americans among its 25 to 34 year-olds.

In the nation's 50 largest metropolitan areas, there were fewer people aged 25 to 34 who described themselves as African-American, single-race in 2000 than were in that same age group and described themselves as African-American in 1990. There were considerable regional variations in this indicative change in the African-American young adult population. Overall, the African-American population became more dispersed among U.S. metropolitan areas. The biggest indicative increases in the African-American population were recorded in a diverse set of metropolitan areas: Minneapolis, Las Vegas, Atlanta, Phoenix and Orlando. Most metropolitan areas experienced indicative declines, with the largest decreases in San Diego, Los Angeles and San Francisco. (The apparent declines in California may, however, reflect a greater fraction of persons who identified themselves as African-American in 1990 and as having 2 or more races in 2000 than was the case in other regions of the country.)

Portland's indicative change in the African-American 25 to 34 year-old population ranked 15th in the nation between 1990 and 2000. Competitor regions Phoenix and Raleigh-Durham chalked up significant gains of 31 percent and 11 percent in 25 to 34 year-old African-Americans, ranking them in the top 10. Portland was roughly in the middle of the pack of its competitor regions

Table 15:

AFRICAN-AMERICAN POPULATION, 2000

Share of 25-34 Population Black, One Race, 2000

Leading Metros

Rank	Metropolitan Area	Percent
1	Memphis, TN-AR-MS MSA	43.2%
2	New Orleans, LA MSA	36.8%
3	Norfolk-Virginia Beach-Newport News, VA-NC MSA	30.8%
4	Richmond-Petersburg, VA MSA	30.0%
5	Atlanta, GA MSA	30.0%

Benchmark Metros

10	Raleigh-Durham-Chapel Hill, NC MSA	21.7%
38	Austin-San Marcos, TX MSA	7.5%
43	San Diego, CA MSA	6.1%
45	Seattle-Tacoma-Bremerton, WA CMSA	5.1%
47	Denver-Boulder-Greeley, CO CMSA	4.3%
48	Phoenix-Mesa, AZ MSA	3.8%
49	Portland-Salem, OR-WA CMSA	2.4%

Lowest Metros

46	Providence-Fall River-Warwick, RI-MA MSA	4.3%
47	Denver-Boulder-Greeley, CO CMSA	4.3%
48	Phoenix-Mesa, AZ MSA	3.8%
49	Portland-Salem, OR-WA CMSA	2.4%
50	Salt Lake City-Ogden, UT MSA	1.1%

Table 16:

INDICATIVE CHANGE IN AFRICAN-AMERICAN POPULATION, 2000

Increase in 25-34 Population Black

Leading Metros

Rank	Metropolitan Area	Percent
1	Minneapolis--St. Paul, MN --WI MSA	48.5%
2	Las Vegas, NV--AZ MSA	43.0%
3	Atlanta, GA MSA	35.7%
4	Phoenix--Mesa, AZ MSA	31.2%
5	Orlando, FL MSA	29.6%

Benchmark Metros

4	Phoenix--Mesa, AZ MSA	31.2%
8	Raleigh--Durham--Chapel Hill, NC MSA	11.2%
11	Austin--San Marcos, TX MSA	8.4%
15	Portland--Salem, OR--WA CMSA	4.9%
16	Seattle--Tacoma--Bremerton, WA CMSA	3.6%
28	Denver--Boulder--Greeley, CO CMSA	-5.3%
48	San Diego, CA MSA	-26.6%

Lowest Metros

46	Buffalo--Niagara Falls, NY MSA	-16.9%
47	Pittsburgh, PA MSA	-17.5%
48	San Diego, CA MSA	-26.6%
49	Los Angeles--Riverside--Orange County, CA CMSA	-27.4%
50	San Francisco--Oakland--San Jose, CA CMSA	-30.3%

on this measure: Austin and Seattle had gains roughly comparable to Portland's; San Diego and Denver recorded declines.

ASIAN POPULATION

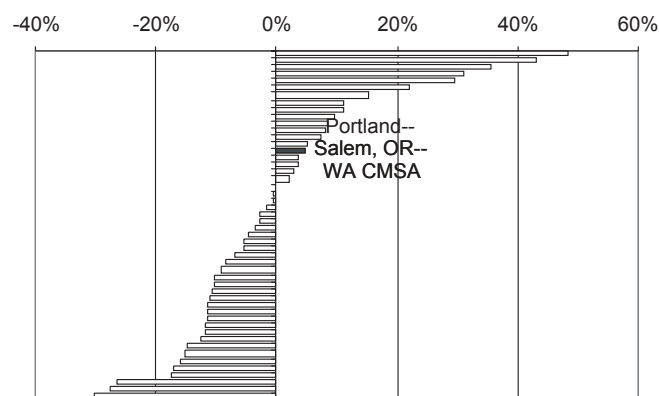
There are about 1.9 million Asian, single-race 25 to 34 year-olds in the nation's metropolitan areas in 2000. The number of 25 to 34 year-olds identifying themselves as Asian in the metropolitan U.S. increased by more than half a million during the decade of the 1990s. Asians now account for almost 6 percent of the metropolitan 25 to 34 population, up from about 4 percent in 1990.

The Asian 25 to 34 year-old population of the Portland metropolitan area increased about twice as much as it did nationally. Portland's Asian 25 to 34 year-old population nearly doubled from 10,900 in 1990 to over 20,000 in 2000. The fraction of Portland's population that is Asian, however, is now slightly greater than the average level of the Asian population in U.S. metropolitan areas.

The Asian population in the United States has historically been most concentrated on the West Coast. Four of the five metropolitan areas with the largest proportions of Asian-Americans aged 25 to 34 are located in California

Figure 12:

INDICATIVE CHANGE IN AFRICAN-AMERICAN 25-34 POPULATION, 1990-2000



and the fifth is Seattle. The distribution of Asian-Americans is still heavily skewed to a relatively few metropolitan areas. In five metropolitan areas, Asian-Americans make up more than 10 percent of the 25 to 34 year-old population; in 40 metropolitan areas Asian-Americans make up between 2 and 6 percent of the population. Metropolitan areas in the South generally have the lowest fraction of Asian-American population.

Portland ranks 9th among the 50 largest US metropolitan areas in the fraction of its 25 to 34 year-old population that is Asian. Asians represent a larger fraction of the young adult population in two competitor regions (Seattle and San Diego—both in the top five).

The Asian population in the metropolitan U.S. became more dispersed over the decade of the 1990s. Percentage increases in the Asian young adult population were greatest in those areas with traditionally small concentrations of Asians and lowest in the areas with traditionally large concentrations of Asians. The indicative increase in the Portland Asian young adult population between 1990 and 2000 was 88 percent, ranking the metropolitan area 24th among the top 50 U.S. metro areas. The pattern of change among competitor region's generally reflected the dispersion of the Asian young adult population. Increases were greatest in areas with historically small numbers of

Table 17:

ASIAN 25-34 POPULATION, 1990 AND 2000

	Number		Percent of 25/34 Population	
	Metro US	Portland	Metro US	Portland
1990	1,345,532	10,934	3.8%	3.6%
2000	1,900,774	20,572	5.8%	6.0%
Change	555,242	9,638		
Growth (%)	41.3%	88.1%		

Note: Racial categories changed between 1990 and 2000, 2000 is Asian, single-race only.

Table 18:

ASIAN POPULATION, 2000

Share of 25-34 Population Asian, One Race, 2000

Leading Metros

Rank	Metropolitan Area	Percent
1	San Francisco–Oakland –San Jose, CA CMSA	21.7%
2	Los Angeles–Riverside–Orange County, CA CMSA	11.0%
3	San Diego, CA MSA	10.6%
4	Sacramento–Yolo, CA CMSA	10.3%
5	Seattle–Tacoma–Bremerton, WA CMSA	10.2%

Benchmark Metros

3	San Diego, CA MSA	10.6%
5	Seattle--Tacoma--Bremerton, WA CMSA	10.2%
9	Portland--Salem, OR--WA CMSA	6.0%
14	Austin--San Marcos, TX MSA	5.3%
18	Raleigh--Durham--Chapel Hill, NC MSA	4.2%
23	Denver--Boulder--Greeley, CO CMSA	3.9%
26	Phoenix--Mesa, AZ MSA	3.2%

Lowest Metros

46	Miami–Fort Lauderdale, FL CMSA	2.2%
47	San Antonio, TX MSA	2.0%
48	Louisville, KY–IN MSA	2.0%
49	Indianapolis, IN MSA	1.9%
50	Greensboro–Winston-Salem –High Point, NC MSA	1.9%

Table 19:

**INDICATIVE CHANGE IN ASIAN
POPULATION, 1990-2000**

Increase in 25-34 Asian Population

Leading Metros

Rank	Metropolitan Area	Percent
1	Louisville, KY–IN MSA	213.9%
2	Las Vegas, NV–AZ MSA	187.0%
3	Atlanta, GA MSA	177.1%
4	Grand Rapids–Muskegon –Holland, MI MSA	169.7%
5	Memphis, TN–AR–MS MSA	149.1%

Benchmark Metros

8	Austin--San Marcos, TX MSA	128.0%
9	Raleigh--Durham--Chapel Hill, NC MSA	125.2%
15	Phoenix--Mesa, AZ MSA	102.3%
23	Denver--Boulder--Greeley, CO CMSA	89.5%
24	Portland--Salem, OR--WA CMSA	88.1%
33	Seattle--Tacoma--Bremerton, WA CMSA	61.4%
48	San Diego, CA MSA	18.8%

Lowest Metros

46	Sacramento–Yolo, CA CMSA	26.5%
47	New Orleans, LA MSA	25.2%
48	San Diego, CA MSA	18.8%
49	Norfolk–Virginia Beach–Newport News, VA–NC MSA	9.0%
50	Los Angeles–Riverside–Orange County, CA CMSA	8.3%

Figure 13:

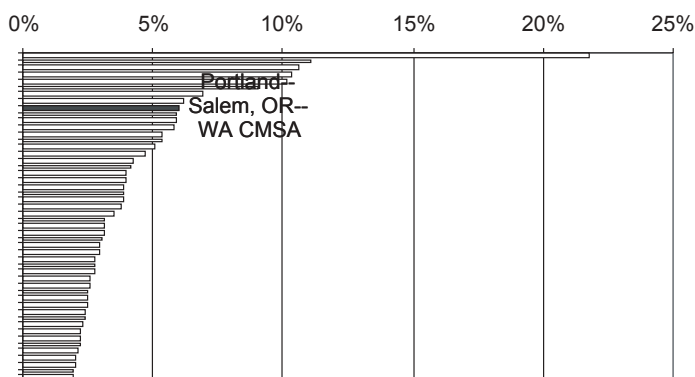
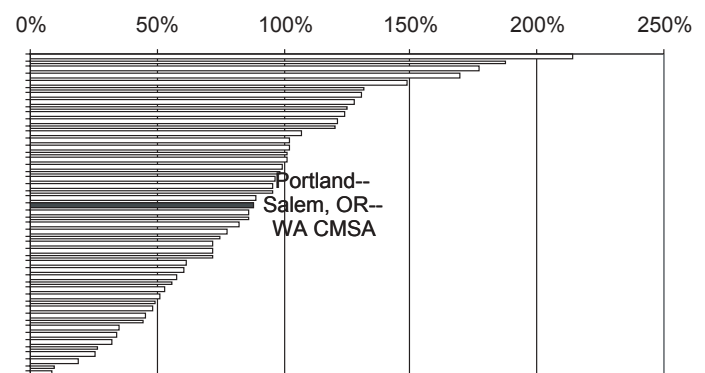
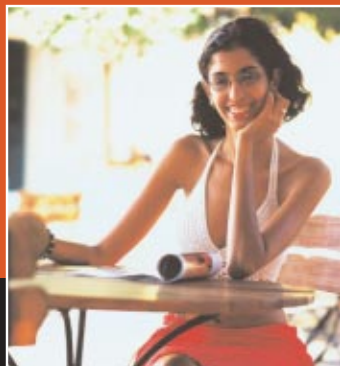
ASIAN 25-34 POPULATION, 2000

Figure 14:

**INDICATIVE CHANGE IN ASIAN 25-34
POPULATION, 1990-2000**

Asians (Austin and Raleigh-Durham) and least in areas with historically larger Asian populations (Seattle and San Diego).



4

YOUNG TALENT:

Educational Attainment of the 25 to 34 Year-Old Population, 1990 and 2000

From an economic perspective, the skills and talent of the workforce are an increasingly important factor in shaping metropolitan growth. For purposes of our analysis, we use educational attainment—measured by the fraction of the population with a 4-year college degree or higher level of education—as our benchmark indicator of skill.

In 2000, nearly 32 percent of the 25 to 34 year-olds in the 50 most populous metropolitan areas in the United States had a four-year college degree.

Between 1990 and 2000, even though the total population of 25 to 34 year-olds in the top 50 metropolitan areas declined, the total number of persons with a four-year degree or higher level of education increased by 11 percent, from about 7 million to almost 7.8 million. Young adults, as a group, recorded a substantial increase in educational attainment over 1990: college attainment in the top 50 metropolitan areas rose from 26.6 percent in 1990 to 31.9 percent in 2000.

The educational attainment of Portland's 25 to 34 year-old population about average for large U.S. metropolitan areas. Census data for 2000 show that 29.0 percent of Metropolitan Portland's 25 to 34 year-old population had received a four-year college degree. Between 1990 and 2000, Portland recorded an outstanding performance in the aggregate change in the number of its 25 to 34 year-olds with a college degree. Census data show that 50 percent more 25 to 34 year-olds had college degrees in 2000 in Portland than in 1990. This increase substantially

exceeded the national trend, where rising college attainment rates offset the numeric decline in 25 to 34 year-olds leading to an increase in college educated 25 to 34 year-olds in 41 of the nation's 50 largest metropolitan areas.

Historically, there has been a marked division of educational attainment by gender, with men better educated than women. As Table 20 illustrates, in Portland in 1990, the college attainment rate of 25 to 34 year-old men exceeded that of women by a small margin. By 2000, women's college attainment exceeded that of men in this age group both in Portland and in the 50 largest metropolitan areas as a group. In Portland during the 1990s, the college attainment rates of women increased by about 10 percentage points from 21.2 percent to 30.9 percent, almost double the increase in men's college attainment rates (about 5 percentage points, from 22.1 percent to 27.2 percent). Overall college attainment rates for young men and young women in Portland trail the metropolitan average by about three percentage points.

There is very substantial variation in the fraction of the young adult population with a college degree among the 50 largest U.S. metropolitan areas. Four of the five highest ranking metropolitan areas have college attainment rates of more than 40 percent; all of the lowest metropolitan areas have college attainment rates of less than 25 percent. The college attainment rate of the highest rated metropolitan area (Raleigh-Durham) is nearly three times that of the lowest rated (Las Vegas).

Table 20:

COLLEGE-EDUCATED 25-34 POPULATION, 1990 AND 2000

	Number Top 50 Metros	College Attainment Rate Portland	Top 50 Metros	Portland
1990	7,014,501	66,706	26.6%	21.7%
Male	3,542,756	34,230	26.9%	22.1%
Female	3,471,908	32,476	26.3%	21.2%
2000	7,789,178	100,091	31.9%	29.0%
Male	3,692,763	48,280	30.3%	27.2%
Female	4,096,415	51,811	33.6%	36.2%
Change, 1990-2000	774,677	33,385		
Male	150,007	14,050		
Female	624,507	19,335		
Growth (Percent)	11.0%	50.0%		
Male	4.2%	41.0%		
Female	18.0%	59.5%		

Portland ranks 27th of the 50 largest U.S. metropolitan areas in college attainment of its 25 to 34 year-old population. Three of its competitors rank in the top 10: Raleigh-Durham (first overall) and Austin and Denver. Seattle ranks 14th in college-educated 25 to 34 year-olds. Portland is ahead of San Diego (30th) and especially Phoenix (44th) on this measure.

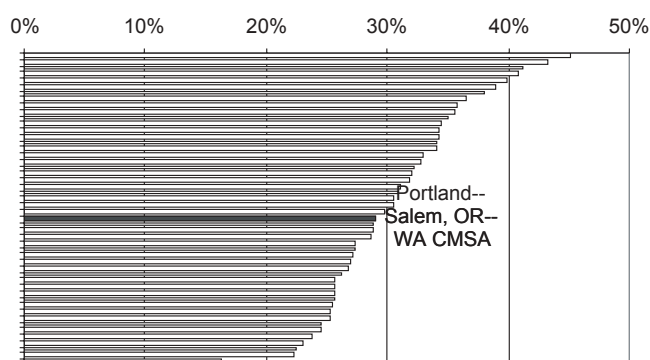
Consistent with the national trend, most metropolitan areas recorded an increase in the number of college-educated 25 to 34 year-olds between 1990 and 2000. The number of college educated 25 to 34 year-olds doubled in Las Vegas and increased by about half in four other metropolitan areas: Charlotte, Austin, Portland, and Atlanta. Several metropolitan areas—mostly in the Northeast—saw actual declines in their college-educated 25 to 34 year-old population.

Table 21:

COLLEGE-EDUCATED POPULATION,
2000 Share of 25-34 Population with a 4-Year

Rank	Metropolitan Area	Percent
Leading Metros		
1	Raleigh-Durham-Chapel Hill, NC MSA	45.2%
2	Boston-Worcester-Lawrence, MA-NH-ME-CT CMSA	43.2%
3	San Francisco-Oakland-San Jose, CA CMSA	41.3%
4	Washington-Baltimore, DC-MD-VA-WV CMSA	40.9%
5	Minneapolis-St. Paul, MN-WI MSA	39.9%
Benchmark Metros		
1	Raleigh--Durham--Chapel Hill, NC MSA	45.2%
6	Austin--San Marcos, TX MSA	38.9%
7	Denver--Boulder--Greeley, CO CMSA	38.1%
14	Seattle--Tacoma--Bremerton, WA CMSA	34.2%
27	Portland--Salem, OR--WA CMSA	29.0%
30	San Diego, CA MSA	28.7%
44	Phoenix--Mesa, AZ MSA	24.6%
Lowest Metros		
46	Norfolk-Virginia Beach-Newport News, VA-NC MSA	23.8%
47	Los Angeles-Riverside-Orange County, CA CMSA	23.0%
48	Jacksonville, FL MSA	22.5%
49	San Antonio, TX MSA	22.2%
50	Las Vegas, NV-AZ MSA	16.3%

Figure 15:

COLLEGE ATTAINMENT OF 25-34
POPULATION, 2000

Portland's increase of 50 percent in college-educated 25 to 34s was fourth highest of the top 50 metropolitan areas. Among its competitor regions only Austin did better, with a 56 percent increase. Three other competitor regions—Raleigh-Durham, Denver and Phoenix—ranked in the top ten on this measure. Seattle was above average and San Diego below average in their increase in college-educated 25 to 34 year-olds.

Another way of looking at the shifting distribution of talent among metropolitan areas is to examine the change in the share of the college-educated 25 to 34 year-old pop-

Table 22:

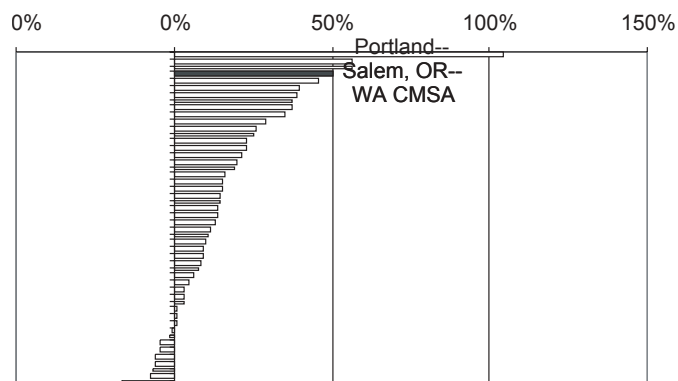
CHANGE IN COLLEGE-EDUCATED POPULATION, 1990-2000

Increase in 25-34 Population with a 4-Year Degree or Higher

Figure 16:

CHANGE IN COLLEGE ATTAINMENT, 1990-2000

Rank	Metropolitan Area	Percent
Leading Metros		
1	Las Vegas, NV-AZ MSA	104.6%
2	Charlotte-Gastonia-Rock Hill, NC-SC MSA	56.6%
3	Austin-San Marcos, TX MSA	56.2%
4	Portland-Salem, OR-WA CMSA	50.0%
5	Atlanta, GA MSA	46.2%
Benchmark Metros		
3	Austin--San Marcos, TX MSA	56.2%
4	Portland--Salem, OR--WA CMSA	50.0%
6	Denver--Boulder--Greeley, CO CMSA	40.1%
7	Phoenix--Mesa, AZ MSA	39.2%
9	Raleigh--Durham--Chapel Hill, NC MSA	37.1%
15	Seattle--Tacoma--Bremerton, WA CMSA	22.9%
36	San Diego, CA MSA	3.6%
Lowest Metros		
46	Buffalo-Niagara Falls, NY MSA	-5.9%
47	Rochester, NY MSA	-6.3%
48	Norfolk-Virginia Beach-Newport News, VA-NC MSA	-6.9%
49	Providence-Fall River-Warwick, RI-MA MSA	-7.0%
50	Hartford, CT MSA	-16.7%



Metropolitan Portland's market share of this key demographic group increased strongly—by 33 one-hundredths of one percent. Portland was fourth among the 50 largest metropolitan areas, in change in market share of college-educated 25 to 34 year-olds. Denver logged a slightly larger increase in market share, and Portland's remaining competitors (except San Diego) all ranked in the top 10 in their increase in share of 25 to 34 year-olds.

College attainment varies substantially by demographic group. Nationally, among 25 to 34 year-olds, Asians have the highest rates of college attainment, while African-Americans and Hispanics have lower than average levels of college attainment. Consequently, the demographic composition of a metropolitan area's population tends to influence its aggregate college attainment rate. To examine whether metropolitan attainment rates were influenced by demographic characteristics, we compiled data from the Public Use Microsample (PUMS) of Census 2000 to estimate the metropolitan level college attainment rate for principal demographic groups in the 25 to 34 year-old population. Because they are drawn from a sample of census respondents, PUMS data computations do not correspond exactly to published census data.

Table 24 shows estimated college attainment rate for the principal racial and ethnic groups in the 25 to 34 year-old population in 2000. The rate of college attainment for whites in Portland is about five percentage points lower than for the comparable racial category nationally. Young Asian adults in Portland lag well behind their counterparts nationally. Portland's young adult Hispanics and African-Americans are slightly less likely than their peers nationally to have completed a college degree. This analysis suggests that Portland's level of college attainment among 25 to 34 year-olds is primarily driven by the relatively lower college attainment rate of white 25 to 34 year-olds.

Another important segment of the college educated 25 to 34 year-old population is single women. Over the past several decades, women's educational attainment has also increased dramatically. In 1960, women were only about half as likely to have college degrees as were men. But while male college attainment rates basically peaked in

ulation living in each metro area between 1990 and 2000. Because the college-educated population increased 11 percent over the decade in the top 50 metropolitan areas, the increase in many metropolitan areas was driven by this national trend, rather than in any shift in the relative attractiveness of their metropolitan area to talented young adults. This market share approach shows whether a metropolitan area increased its more rapidly or more slowly than the 50 largest metropolitan areas as a group.

Table 23 shows the change in share of college-educated 25 to 34 year-olds for the 50 largest metropolitan areas between 1990 and 2000. Atlanta recorded the largest increase in market share of U.S. metropolitan areas—nearly eight-tenths of one percent of all college-educated 25 to 34 year-olds living in the U.S. Other metropolitan areas in the West and South were leaders in increasing their share of these talented young workers. Several of the nation's largest metropolitan areas—including New York, Los Angeles, Boston, and Washington—recorded significant declines in their share of college-educated 25 to 34 year-olds.

Table 23:

CHANGE IN MARKET SHARE OF COLLEGE-EDUCATED POPULATION, 1990-2000

Change in Share of College Educated 25-34s in Top 50 Metropolitan Areas, 1990-2000

Rank	Metropolitan Area	Percent
Leading Metros		
1	Atlanta, GA MSA	0.796%
2	San Francisco–Oakland –San Jose, CA CMSA	0.526%
3	Denver–Boulder–Greeley, CO CMSA	0.430%
4	Portland–Salem, OR –WA CMSA	0.333%
5	Austin–San Marcos, TX MSA	0.329%
Benchmark Metros		
3	Denver--Boulder--Greeley, CO CMSA	0.430%
4	Portland--Salem, OR--WA CMSA	0.333%
5	Austin--San Marcos, TX MSA	0.329%
6	Phoenix--Mesa, AZ MSA	0.327%
8	Seattle--Tacoma--Bremerton, WA CMSA	0.232%
10	Raleigh--Durham--Chapel Hill, NC MSA	0.229%
41	San Diego, CA MSA	-0.116%
Lowest Metros		
46	Washington–Baltimore, DC–MD –VA–WV CMSA	-0.293%
47	Philadelphia–Wilmington –Atlantic City, PA–NJ–D	-0.433%
48	Boston–Worcester–Lawrence, MA–NH–ME–CT CMSA	-0.488%
49	New York–Northern New Jersey–Long Island, NY–NJ	-1.121%
50	Los Angeles–Riverside–Orange County, CA CMSA	-1.207%

the 1970s, women's college attainment rates continued to increase. By the mid 1990s, there was basically no difference in the college attainment rates of young adult (25 to 34 year-old) men and women. Since 1997, college attainment rates of women in this age group have clearly surpassed those of their male counterparts. For those aged 25 to 34 in 2002, the college attainment rate of women was 32.7 percent for women compared 28.5 percent for men (Bureau of the Census, 2003c). Those now aged 25 to 34 represent the first generation where women are measurably better educated than men.

Never-married women tend to be the better educated and more mobile than their married counterparts. And significantly, the number of never-married women in the 25 to 34 year-old age group has increased, even though the total number of 25 to 34 year-old women has decreased by 2

million since 1990. The number of single, never-married women in this age group actually increased by almost 10 percent. In 1990, there were 5.3 million single, never-married women in the U.S.; by 2000, there were 5.8 million.

The Census data do not separately publish data that show the educational level, marital status, gender and age in a way that enable us to directly compute the change in the number of never-married female college graduates aged 25 to 34 by metropolitan area. However, drawing on data from the Public Use Microsample, we were able to estimate the fraction of 25 to 34 year-old women who were single, never-married and who had a college degree. Among the top 50 metropolitan areas, 16 percent of all 25 to 34 year-old women are single and have a four-year college degree or higher level of education. For Portland, we estimate that about 16 percent of all 25 to 34 year-old women are single, never-married and have a four-year degree. Interestingly, single women in Metropolitan Portland are much more likely to be college-educated than married women -- about 44 per cent of 25 to 34 year-old single women are college-educated, compared to about 33.6 percent of married women. Portland has the largest disparity in the educational attainment rates of ever-married and never-married 25 to 34 year-old women of the 50 largest metropolitan areas. This suggests that Portland is relatively more attractive to single, well-educated women.

Table 24:

ESTIMATED EDUCATIONAL ATTAINMENT BY PRINCIPAL ETHNIC GROUPS 2000

	Portland	Top 50 Metros
All Race	32%	33%
White	33%	38%
African-American	16%	18%
Asian	48%	56%
Hispanic	10%	11%

Table 25:

SINGLE, COLLEGE-EDUCATED WOMEN AS A PERCENT OF 25-34 WOMEN

	Portland	Top 50 Metros
Single, College Educated	16%	16%



5

DISSECTING CHANGE:

Component Analysis of Change in 25 to 34 Year-Old Population, 1990 to 2000

As the previous sections of this report illustrate, the change in the number of 25 to 34 year-olds in each metropolitan area is the product of complex interactions between national trends (a less numerous birth cohort aged 25 to 34 in 2000 than a decade earlier), shifting demographics (declining numbers of whites, increasing numbers of Asians and Hispanics), metropolitan growth trends (rapid growth in some metropolitan areas, like Las Vegas and decline in others like Buffalo), and finally, the unique attractiveness of some metropolitan areas to the 25 to 34 year-old generation.

In this portion of our report, we attempt to segregate out the various drivers of change to estimate filter out the contribution of national demographic and metropolitan-specific growth trends and arrive at an estimate of each metropolitan area's increase (or decrease) in young people not explained by these factors.

Our estimates of the contribution of each of these factors to the change in the 25 to 34 year-old population in Metropolitan Portland between 1990 and 2000 are shown in Table 26. We have decomposed the change in population into three factors. The first factor is the national trend. Because of the smaller size of the 1966-75 birth cohort than the 1956-65 birth cohort, there are about 10 percent fewer 25 to 34 year-olds nationally in 2000 than 1990. This 10 percent reduction is the national trend contribution to the change in the population of each metropolitan area between 1990 and 2000. All other things equal, if the reduction in population had

been experienced equally in all metropolitan areas (and there had been no relative change in the size of metropolitan areas), this would have resulted in a 10 percent reduction in the 25 to 34 year-old population of each metropolitan area. For Portland, for the decade 1990 to 2000, we estimate the size of this national trend effect at -25,675 25 to 34 year-olds.

Our second factor is the metropolitan growth factor. Some metropolitan areas grew faster than others, some grew more slowly, and others declined. Some of the growth (or decline) in the number of 25 to 34 year-olds in any metropolitan area is shaped simply by whether these were growing (or declining) metropolitan areas. To estimate this overall metropolitan trend effect, we have estimated the share of the metropolitan U.S. population that resided in each of the 50 largest metropolitan areas in 1990 and in 2000. We then examined the shift in share of each metropolitan area between 1990 and 2000. We used this shift-share factor to estimate the metropolitan trend component in population growth for each metropolitan area between 1990 and 2000. In 1990, Portland accounted for 0.904 percent of U.S. metropolitan population. In 2000, it accounted for 1.002 percent, for a shift in share between 1990 and 2000 of 0.098 percentage points. Applying this shift share factor to the 2000 population of 25 to 34 year-olds suggests, that all other things being equal, the growing share of the U.S. metropolitan population that lived in Portland would have produced an increase of 32,350 25 to 34 year-old residents between 1990 and 2000.

Table 26:

COMPONENTS OF CHANGE IN 25-34 POPULATION, 1990 TO 2000

	Portland
National Trend	(25,675)
MetroTrend	32,350
Youth Effect	30,719
Net Change	37,394

The difference between these two factors—the national trend effect of –25,675 and the metropolitan growth trend effect of +32,350—and the actual change in the 25 to 34 year-old population (an increase of 37,394)—is the youth attractiveness effect for Portland. The effect for Portland is +30,719, meaning that Portland gained about 30,700 more 25 to 34 year-old adults that we would have expected based solely on national demographic and metropolitan growth trends. This suggests that on balance, Portland is relatively much more attractive to the nation's 25 to 34 year-olds in 2000 than it was in 1990, and that its increase in population in this age group is not due simply to Portland's faster than average overall growth rate.

It is also instructive to compare the shift in share of Portland's population for various demographic groups. Table 27 shows Portland's share—of the 50 largest metropolitan areas—of total metropolitan population, the 25 to 34 year-old population, and the college-educated 25 to 34 year-old population in both 1990 and 2000. Overall, Portland recorded an increase in its share of the U.S. metropolitan population (+0.130 percent). Portland's share of the metropolitan 25 to 34 year-old population increased substantially more (+0.247 percent). Portland's share of the college educated 25 to 34 year-old population increased even more than its share of

Table 27:

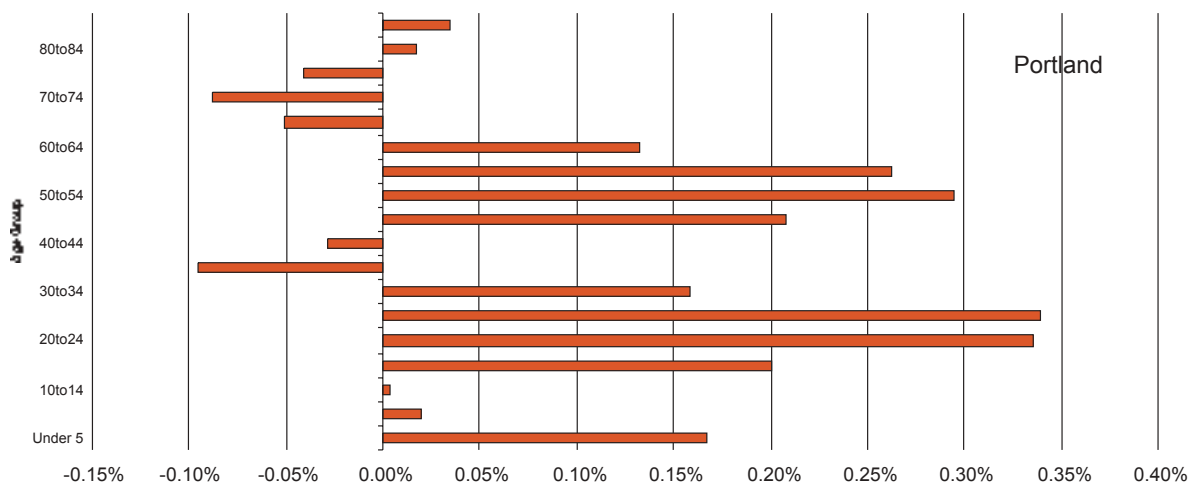
SHIFT IN SHARE OF 25-34 POPULATION IN TOP 50 METROS, 1990 TO 2000

	Portland 1990	2000	Shift, 1990-2000
Total Population	1.264%	1.394%	0.130%
25/34 Population	1.168%	1.415%	0.247%
College Educated 25/34s	0.951%	1.285%	0.334%
Male	0.966%	1.307%	0.341%
Female	0.935%	1.265%	0.329%

young adults (+0.334 percent). There was very little difference in this market share shift by gender: Portland registered an increase in its share of college educated 25 to 34 year-old men (+0.341 percent) and a similar increase in its share of college educated women (+0.329 percent).

In a broader context, we can see how Portland's share of U.S. metropolitan population by age group changed over the period 1990 to 2000. Figure 17 shows the shift in Portland's share of the U.S. population in each of 17 five-year age groups between 1990 and 2000. Portland recorded increases in every age group under 35 and between 45 and 64 years of age. Its market share declined among persons between 35 and 44, and among persons 65 to 80. The overall pattern of these changes shows that Metropolitan Portland is gaining population relative to the rest of the nation primarily among the young, and is losing a share of its population among persons in their late 30s and early 40s, and retirees.

Figure 17: SHIFT IN SHARE OF US POPULATION BY AGE GROUP, 1990-2000





6

ON THE MOVE:

Migration of 25 to 34 Year-Olds, 1995 to 2000

To this point in our report, we have compared the differing location patterns of two different birth cohorts when they were 25 to 34 years of age. Our data for 1990 reflected the locational patterns of those born between 1956 and 1965, and our 2000 data reflected the locational patterns of those born between 1966 and 1975. We have, in effect, compared two different snapshots of two separate groups of people taken ten years apart.

A major factor shaping these location patterns is the migration decisions of individuals as they move among metropolitan areas. As we examine migration data, our analysis undergoes a subtle but very important shift. Now we will be looking at a single birth cohort and comparing its location decisions at two different points in time.

The 2000 Census elicited information about migration patterns by asking each respondent to identify whether they lived in a different house in 2000 than they had in 1995, and then followed up to ask the location of that 1995 residence for those that had moved. Consequently, migration data reported in the 2000 Census reflects the change in residence of respondents from where they were five years earlier, when of course, they were five years younger. So for example, data reported for persons aged 25 to 34 in 2000 reflect the change in residence of these respondents since 1995, at which time they were between 20 and 29 years of age.

Particularly for persons in their early 20s—21, 23, 23 and 24 years of age—migration is likely to reflect movement away from college campuses. As a result, migration data generally show the changing patterns of location of people at different points in their life rather than simply changes in the relative attractiveness of different metropolitan areas over time. For example, metropolitan areas with large universities (State College, Pennsylvania or South Bend, Indiana) have large in-migration of persons in their late teens and large out-migration of persons in their early to mid 20s. Metropolitan areas with a relatively smaller higher education infrastructure usually show the reverse pattern. In this case, migration data don't necessarily show whether a metropolitan area is becoming more—or less—attractive to young people over time. Consequently, caution must be taken in interpreting these data.

Census data provide us with information on two types of migration: domestic and international. Domestic migration is movement within the United States. For persons who lived in the United States in both 1995 and 2000, Census reports gross domestic in-migration (the number of people moving into a metropolitan area), gross domestic out-migration (the number of people moving out of a metropolitan area), and net domestic migration (the difference between these two amounts).

Census separately identifies the gross in-migration of residents from foreign countries, i.e., the total number of

Figure 18:
MIGRATION RATE BY AGE GROUP, 1995-2000

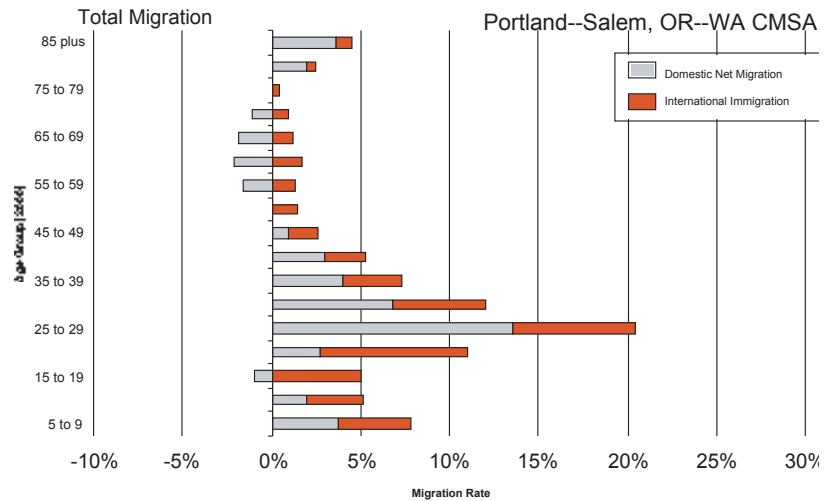
persons in a metropolitan area in 2000 who were living outside the United States in 1995. It is important to keep in mind that this group includes both U.S. citizens who may have been living abroad as well as foreign citizens who have migrated to the United States. Because the Census includes only residents of the U.S., there are no statistics on international out-migration from metropolitan areas.

Table 28 shows domestic and international migration for Metropolitan Portland from 1995 to 2000 for the total population (all ages) and for persons aged 25 to 34 in 2000. Between 1995 and 2000, nearly 314,000 people moved to Portland and about 255,000 people moved away from Portland, producing net domestic in-migration of about 59,000 persons. The migration rate—computed as the number of migrants divided by the 2000 population—was gross in-migration of 14.9 percent, gross out-migration of 12.1 percent, and net in-migration of 2.8 percent.

Between 1995 and 2000, about 89,000 domestic residents aged 25 to 34 (in 2000) moved into Portland and 54,000 moved out for net in-migration of 35,000. Both the in-migration rate and the out-migration rate for 25 to 34 year-olds were higher than for the overall population—not surprising given the relatively high mobility of persons in this age group. The number of in-migrants greatly exceeds the number of out-migrants. Among migrants of all ages, in-migrants outnumbered out-migrants 5 to 4. Among migrants aged 25 to 34 (in 2000), in-migrants outnumbered out-migrants 5 to 3.

At first glance, it might seem inconsistent that Portland could have an increase in the number of 25 to 34 year-olds of nearly 37,000 in the 10 years between 1990 and 2000 (as we reported in Table 2), and net domestic and international in-migration of persons in that age group of more than 55,000 in the five years between 1995 and 2000 (as shown in Table 28). It is, however, perfectly possible to have net migration that substantially exceeds the size of the total increase in the 25 to 34 year-old population. The reason is that, over time, a large number of persons are “aging out” of the 25 to 34 year-old age group. Between 1995 and 2000, we estimate that a net of more than 13,000 persons “aged out” of the 25 to 34 year-old age group in Portland (that is, the number of persons turning 35 over that five-year period exceed the number of persons turning 25, by about 13,000). This had the effect of offsetting some of the increase in the population in this age group.

Figure 18 illustrates the relationship between migration and age for the Portland metropolitan area. The data show that the likelihood of migrating peaks in when persons are in their twenties, and generally declines thereafter. Portland recorded net domestic in-migration (that is the number of in-migrants exceeded the number of out-migrants) among all age groups younger than 50, except



15 to 19 year-olds. There is net domestic out-migration of persons in their late fifties and sixties, an age when many people are approaching retirement.

Portland’s gross international in-migration was about 73,000 overall, with about 20,700 of these international in-migrants being between 25 and 34 years of age in 2000.

Migration rates vary substantially among metropolitan areas. Domestic gross in-migration rates for 25 to 34 year-olds range from a high of more than 30 percent (chiefly in fast growing metropolitan areas in the West and South) to lows of around 10 percent, especially in

Table 28:
MIGRATION SUMMARY

Total Population		25-34 Population		
	Number	Rate	Number	Rate
Domestic Migration				
Gross In-Migration	313,900	14.9%	89,335	25.9%
Gross Out-Migration	254,723	12.1%	54,242	15.7%
Net Migration	59,177	2.8%	35,093	10.2%
In/Out Ratio	1.2		1.6	
International Migration				
Gross International In-Migration	73,078	3.5%	20,724	6.0%

very large metropolitan areas (New York, Los Angeles Chicago). Portland’s gross domestic in-migration rate for 25 to 34 year-olds was 26.4 percent, ranking 15th highest of the 50 largest metropolitan areas in the U.S. Portland’s rate of gross in-migration of 25 to 34 year-olds lagged behind that of Raleigh-Durham, Austin and Denver—all ranked in the top 10—and roughly the same as its other competitor regions.

Table 29:

DOMESTIC GROSS IN-MIGRATION RATES OF 25-34s, 1995-2000

Rank	Metro	Rate
Leading Metros		
1	Las Vegas, NV-AZ MSA	35.1%
2	Raleigh-Durham-Chapel Hill, NC MSA	34.6%
3	Austin-San Marcos, TX MSA	32.7%
4	Denver-Boulder-Greeley, CO CMSA	31.1%
5	Orlando, FL MSA	31.0%
Benchmark Metros		
2	Raleigh--Durham--Chapel Hill, NC MSA	34.6%
3	Austin--San Marcos, TX MSA	32.7%
4	Denver--Boulder--Greeley, CO CMSA	31.1%
13	Phoenix--Mesa, AZ MSA	26.2%
15	Portland--Salem, OR--WA CMSA	25.9%
16	Seattle--Tacoma--Bremerton, WA CMSA	25.9%
19	San Diego, CA MSA	24.5%
Lowest Metros		
46	Chicago-Gary-Kenosha, IL-IN-WI CMSA	12.9%
47	Detroit-Ann Arbor-Flint, MI CMSA	12.5%
48	Buffalo-Niagara Falls, NY MSA	11.7%
49	Los Angeles-Riverside-Orange County, CA CMSA	10.1%
50	New York-Northern New Jersey-Long Island, NY-NJ	8.8%

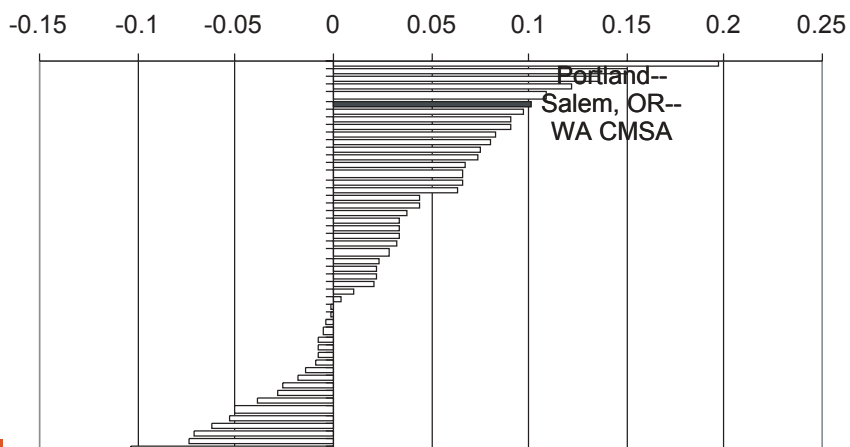
Table 30:

DOMESTIC GROSS OUT-MIGRATION RATES OF 25-34s, 1995-2000

Rank	Metro	Rate
Leading Metros		
1	Norfolk-Virginia Beach-Newport News, VA-NC MSA	36.9%
2	San Diego, CA MSA	29.5%
3	Raleigh-Durham-Chapel Hill, NC MSA	26.3%
4	Oklahoma City, OK MSA	26.1%
5	Jacksonville, FL MSA	25.0%
Benchmark Metros		
2	San Diego, CA MSA	29.5%
3	Raleigh--Durham--Chapel Hill, NC MSA	26.3%
6	Austin--San Marcos, TX MSA	24.7%
19	Seattle--Tacoma--Bremerton, WA CMSA	19.5%
22	Denver--Boulder--Greeley, CO CMSA	18.9%
37	Portland--Salem, OR--WA CMSA	15.7%
39	Phoenix--Mesa, AZ MSA	15.3%
Lowest Metros		
46	Houston-Galveston-Brazoria, TX CMSA	13.6%
47	Dallas-Fort Worth, TX CMSA	13.5%
48	Los Angeles-Riverside-Orange County, CA CMSA	13.0%
49	Detroit-Ann Arbor-Flint, MI CMSA	12.6%
50	New York-Northern New Jersey-Long Island, NY-NJ	11.5%

Figure 19:

NET DOMESTIC MIGRATION 25-34s, 1995-2000



Gross domestic out-migration rates also vary substantially among metropolitan areas. In-migration and out-migration rates are often correlated. Some metropolitan areas have both high rates of in-migration and out-migration (Raleigh Durham ranks second in in-migration and third in out-migration) and some have very low rates of both in and out-migration (New York, Detroit and Los Angeles are all in the bottom five in both in-migration and out-migration rates). As Table 30 illustrates, Portland ranked 37th in out-migration rate among the 50 largest metropolitan areas. Portland's rate of out-migration was lower than all of its competitor regions except Phoenix. Austin and Raleigh-Durham had rates of out-migration that ranked nearly as high as their rates of in-migration.

The difference between gross domestic in-migration and gross domestic out-migration is net domestic migration. The highest-ranking

areas had net in-migration rates of between 10 and 20 percent, meaning that domestic migration had the net effect over the five-year period between 1995 to 2000 of increasing the population of the 25 to 34 year-old age group 10 to 20 percent above what it otherwise would have been. The lowest-ranking metropolitan areas had net out-migration of 25 to 34 year-olds of between 5 and 10 percent. The regions with the greatest net in-migration were in the West and South; the metropolitan areas with the greatest net out-migration of 25 to 34 year-olds were in the Northeast and South. Between 1995 and 2000, Portland had a net in-migration rate of 25 to 34 year-olds of 10.2 percent, ranking 6th of the 50 largest metropolitan areas. All of its competitor regions also had net in-migration of 25 to 34 year olds, except San Diego, which recorded net out-migration of about 5 percent. Portland's net migration is apparently the product of lower than average out-migration rather than above average in-migration.

Table 31:
**NET DOMESTIC MIGRATION RATES,
1995-2000**

Rank	Metro	Rate
Leading Metros		
1	Las Vegas, NV--AZ MSA	19.8%
2	Charlotte--Gastonia --Rock Hill, NC--SC MSA	15.0%
3	Atlanta, GA MSA	13.6%
4	Denver--Boulder --Greeley, CO CMSA	12.2%
5	Phoenix--Mesa, AZ MSA	10.9%
Benchmark Metros		
4	Denver--Boulder--Greeley, CO CMSA	12.2%
5	Phoenix--Mesa, AZ MSA	10.9%
6	Portland--Salem, OR--WA CMSA	10.2%
10	Raleigh--Durham--Chapel Hill, NC MSA	8.3%
11	Austin--San Marcos, TX MSA	8.0%
17	Seattle--Tacoma--Bremerton, WA CMSA	6.3%
45	San Diego, CA MSA	-5.1%
Lowest Metros		
46	Pittsburgh, PA MSA	-5.3%
47	New Orleans, LA MSA	-6.2%
48	Rochester, NY MSA	-7.2%
49	Norfolk--Virginia Beach--Newport News, VA--NC MSA	-7.3%
50	Buffalo--Niagara Falls, NY MSA	-10.3%

Table 32:
**INTERNATIONAL GROSS
IN-MIGRATION RATE OF 25-34s,
1995-2000**

Rank	Metro	Rate
Leading Metros		
1	Miami--Fort Lauderdale, FL CMSA	13.4%
2	San Francisco--Oakland --San Jose, CA CMSA	10.9%
3	New York--Northern New Jersey--Long Island, NY--NJ	9.1%
4	West Palm Beach--Boca Raton, FL MSA	8.6%
5	Orlando, FL MSA	8.1%
Benchmark Metros		
7	Raleigh--Durham--Chapel Hill, NC MSA	7.8%
8	Phoenix--Mesa, AZ MSA	7.5%
10	Austin--San Marcos, TX MSA	7.2%
14	San Diego, CA MSA	6.9%
15	Seattle--Tacoma--Bremerton, WA CMSA	6.7%
18	Denver--Boulder--Greeley, CO CMSA	6.6%
20	Portland--Salem, OR--WA CMSA	6.0%
Lowest Metros		
46	Louisville, KY--IN MSA	2.9%
47	Cleveland--Akron, OH CMSA	2.8%
48	Pittsburgh, PA MSA	2.6%
49	Cincinnati--Hamilton, OH--KY--IN CMSA	2.5%
50	New Orleans, LA MSA	2.3%

Gross international in-migration is particularly important to driving growth in a number of metropolitan areas. Three Florida metropolitan areas—Miami, West Palm Beach, and Orlando—have the highest rates of gross international in-migration of 25 to 34 year-olds between 1995 and 2000. Gross international in-migration is generally least significant in smaller cities located generally in the interior of the U.S. Portland has a fairly typical rate of international in-migration of 25 to 34 year-olds—6.0 percent. Portland ranked 20th in international in-migration among the 50 largest U.S. metropolitan areas. Competitor regions were all above median in international in-migration rates, ranging from Raleigh-Durham at 7.8 percent (7th of the top 50) to Denver at 6.6 percent (20th).



7

COMING AND GOING:

The Origins and Destinations of 25 to 34 Year-Old Migrants

The pattern of migration among regions, states and metropolitan areas provides insight into the factors driving the migration of young adults. In this section of our report, we use data from Census 2000 to identify the origins of in-migrants and the destinations of out-migrants from Portland.

We begin by looking at the broad regional patterns of movement of 25 to 34 year-olds to and from Metropolitan Portland. Table 33 shows the number of in-migrants, out-migrants and net migration to Portland by 25 to 34 year-olds between 1995 and 2000 by Census region. Portland attracted net migrants from every other region of the country. Not surprisingly, the largest source of in-migrants (and the largest destination region of out-migrants) was other places in the West. About two-thirds of in-migrants came from the West and nearly three-quarters of out-migrants moved to other places in the West. In-migrants from the Northeast and Midwest outnumber out-migrants to those regions by about two to one; in-migrants from the South and other portions of the West outnumber out-migrants to those regions about three to two.

We can get a better idea of the source of in-migration to Portland by identifying the specific metropolitan areas that contribute the most in-migrants to the metropolitan area. Table 34 shows, for the 25 most important sources of in-migrants, the metropolitan area of origin of the 25 to 34 year-old in migrants to Portland between 1995 and 2000. Migrants to Portland come from a variety of places, chiefly elsewhere in the West and two large metropolitan areas in the Northeast (New York) and Midwest (Chicago). The sources of in-migration are not particularly concentrated—the 10 leading sources of in-migration account for about 38 percent of the in-migrants.

Table 33:

GROSS AND NET MIGRATION BY CENSUS REGION

Individuals 25-34
in 2000

Census Region

Gross Migration
In

Out

Net
Migration

Midwest

10,390

4,614

5,776

Northeast

5,844

3,028

2,816

South

10,485

6,740

3,745

West

62,616

39,860

22,756

Total Domestic Migration

89,335

54,242

35,093

Table 34:

GROSS IN-MIGRATION OF 25-34 YEAR OLDS, 1995 TO 2000

Individuals 25-34 in 2000

Rank	Metropolitan Area of Residence in 1995	Gross In-Migration		Net Migration
		Number	Percent	
1	Seattle-Tacoma-Bremerton, WA CMSA	7,109	8%	1,021
2	Los Angeles-Riverside-Orange County, CA	6,668	7%	3,595
3	San Francisco-Oakland-San Jose, CA CMSA	4,678	5%	1,675
4	Eugene-Springfield, OR MSA	4,474	5%	2,595
5	Corvallis, OR MSA	3,030	3%	2,170
6	San Diego, CA MSA	1,815	2%	890
7	Phoenix-Mesa, AZ MSA	1,738	2%	(223)
8	New York-Northern New Jersey-Long Islan	1,631	2%	369
9	Spokane, WA MSA	1,326	1%	671
10	Chicago-Gary-Kenosha, IL-IN-WI CMSA	1,303	1%	622
11	Denver-Boulder-Greeley, CO CMSA	1,302	1%	396
12	Medford-Ashland, OR MSA	1,287	1%	499
13	Salt Lake City-Ogden, UT MSA	1,212	1%	756
14	Sacramento-Yolo, CA CMSA	1,143	1%	423
15	Washington-Baltimore, DC-MD-VA-WV CMSA	1,047	1%	356
16	Honolulu, HI MSA	1,042	1%	734
17	Boston-Worcester-Lawrence, MA-NH-ME-CT	966	1%	331
18	Minneapolis-St. Paul, MN-WI MSA	902	1%	301
19	Dallas-Fort Worth, TX CMSA	767	1%	106
20	Boise City, ID MSA	722	1%	(62)
21	Provo-Orem, UT MSA	715	1%	489
22	Las Vegas, NV-AZ MSA	658	1%	(173)
23	Tucson, AZ MSA	641	1%	343
24	Yakima, WA MSA	609	1%	452
25	Fresno, CA MSA	602	1%	389

Table 35:

GROSS OUT-MIGRATION OF 25-34 YEAR OLDS, 1995 TO 2000

Individuals 25-34 in 2000

Rank	Metropolitan Area of Residence in 2000	Gross Out-Migration		Net Migration
		Number	Percent	
1	Seattle-Tacoma-Bremerton, WA CMSA	6,088	11%	1,021
2	Los Angeles-Riverside-Orange County, CA	3,073	6%	3,595
3	San Francisco-Oakland-San Jose, CA CMSA	3,003	6%	1,675
4	Phoenix-Mesa, AZ MSA	1,961	4%	(223)
5	Eugene-Springfield, OR MSA	1,879	3%	2,595
6	New York-Northern New Jersey-Long Islan	1,262	2%	369
7	San Diego, CA MSA	925	2%	890
8	Denver-Boulder-Greeley, CO CMSA	906	2%	396
9	Corvallis, OR MSA	860	2%	2,170
10	Las Vegas, NV-AZ MSA	831	2%	(173)
11	Medford-Ashland, OR MSA	788	1%	499
12	Boise City, ID MSA	784	1%	(62)
13	Sacramento-Yolo, CA CMSA	720	1%	423
14	Washington-Baltimore, DC-MD-VA-WV CMSA	691	1%	356
15	Chicago-Gary-Kenosha, IL-IN-WI CMSA	681	1%	622
16	Dallas-Fort Worth, TX CMSA	661	1%	106
17	Spokane, WA MSA	655	1%	671
18	Boston-Worcester-Lawrence, MA-NH-ME-CT	635	1%	331
19	Minneapolis-St. Paul, MN-WI MSA	601	1%	301
20	Atlanta, GA MSA	463	1%	97
21	Salt Lake City-Ogden, UT MSA	456	1%	756
22	Richland-Kennewick-Pasco, WA MSA	353	1%	59
23	Houston-Galveston-Brazoria, TX CMSA	309	1%	126
24	Honolulu, HI MSA	308	1%	734
25	Tucson, AZ MSA	298	1%	343

Table 36:

NET IN-MIGRATION OF 25-34 YEAR OLDS, 1995 TO 2000

Individuals 25-34 in 2000

Rank	Metropolitan Area	Net Migration Number	Percent
1	Los Angeles-Riverside-Orange County, CA	3,595	10%
2	Eugene-Springfield, OR MSA	2,595	7%
3	Corvallis, OR MSA	2,170	6%
4	San Francisco-Oakland-San Jose, CA CMSA	1,675	5%
5	Seattle-Tacoma-Bremerton, WA CMSA	1,021	3%
6	San Diego, CA MSA	890	3%
7	Salt Lake City-Ogden, UT MSA	756	2%
8	Honolulu, HI MSA	734	2%
9	Spokane, WA MSA	671	2%
10	Chicago-Gary-Kenosha, IL-IN-WI CMSA	622	2%
11	Medford-Ashland, OR MSA	499	1%
12	Provo-Orem, UT MSA	489	1%
13	Yakima, WA MSA	452	1%
14	Sacramento-Yolo, CA CMSA	423	1%
15	Denver-Boulder-Greeley, CO CMSA	396	1%
16	Albuquerque, NM MSA	393	1%
17	Fresno, CA MSA	389	1%
18	New York-Northern New Jersey-Long Islan	369	1%
19	Washington-Baltimore, DC-MD-VA-WV CMSA	356	1%
20	Tucson, AZ MSA	343	1%
21	Boston-Worcester-Lawrence, MA-NH-ME-CT	331	1%
22	Bellingham, WA MSA	305	1%
23	Minneapolis-St. Paul, MN-WI MSA	301	1%
24	Philadelphia-Wilmington-Atlantic City,	289	1%
25	Madison, WI MSA	285	1%

Table 37:

NET OUT-MIGRATION OF 25-34 YEAR OLDS, 1995 TO 2000

Individuals 25-34 in 2000

Rank	Metropolitan Area	Net Migration Number	Percent
1	Phoenix-Mesa, AZ MSA	(223)	-1%
2	Las Vegas, NV-AZ MSA	(173)	0%
3	Charlotte-Gastonia-Rock Hill, NC-SC MSA	(110)	0%
4	Pensacola, FL MSA	(68)	0%
5	Greenville-Spartanburg-Anderson, SC MSA	(63)	0%
6	Boise City, ID MSA	(62)	0%
7	Daytona Beach, FL MSA	(37)	0%
8	Greensboro--Winston-Salem--High Point,	(37)	0%
9	Yuma, AZ MSA	(33)	0%
10	Joplin, MO MSA	(28)	0%
11	Macon, GA MSA	(28)	0%
12	Charleston-North Charleston, SC MSA	(24)	0%
13	Evansville-Henderson, IN-KY MSA	(23)	0%
14	Barnstable-Yarmouth, MA MSA	(20)	0%
15	Melbourne-Titusville-Palm Bay, FL MSA	(19)	0%
16	Asheville, NC MSA	(17)	0%
17	Fort Pierce-Port St. Lucie, FL MSA	(17)	0%
18	Fayetteville-Springdale-Rogers, AR MSA	(16)	0%
19	Beaumont-Port Arthur, TX MSA	(13)	0%
20	Fort Myers-Cape Coral, FL MSA	(13)	0%
21	Mansfield, OH MSA	(12)	0%
22	Wichita Falls, TX MSA	(12)	0%
23	Charleston, WV MSA	(9)	0%
24	Johnstown, PA MSA	(9)	0%
25	St. Joseph, MO MSA	(9)	0%

Many of the same metropolitan areas are the principal destinations of out-migrants from Portland, as shown in Table 35. Eight of the 10 largest sources of in-migrants are also among the 10 largest destinations of out-migrants. The strong overlap between these two lists shows that migration is a two-way process reflecting a variety of economic, social and personal relationships between pairs of metropolitan areas. Migration is almost always a two-way street, not a one way street. The leading destinations of out-migrants include other cities in West, plus New York. As with in-migration, out-migration is not particularly concentrated; the top 10 designations of out-migrants account for about 38 percent of out-migrants.

The difference between in-migration and out-migration is the net migration to a metropolitan area. We examine both the largest sources of net in-migration to see which areas are consistently losing young adults to Portland, and the largest destinations for net out-migration to show which metropolitan areas to which Portland is most consistently losing its young adults.

The principal sources of Portland's net in-migration are California and elsewhere in the Pacific Northwest. Together, Los Angeles and San Francisco account for 15 percent of net migration to Portland, and the college towns of Oregon—Corvallis and Eugene—another 13 percent. Other Western cities round out five of the six remaining spots in the top 10 sources of net migration.

At the other end of the competitive spectrum, Table 37 shows which metropolitan areas are attracting, on balance, the largest numbers of Portland's young adults. Here the list is led by two cities in the desert Southwest (Phoenix and Las Vegas). The remainder of this list is dominated by smaller cities in the South, with a few other cities in

Table 38:

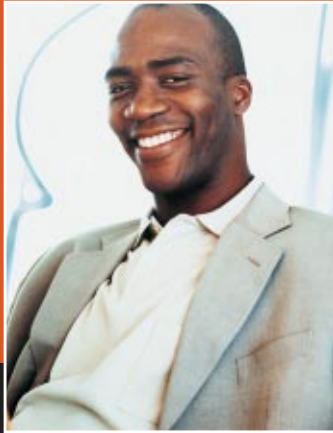
NET MIGRATION AMONG TOP 50 METRO AREAS, 1995-2000 NET MIGRATION TO PORTLAND MSA, 1995-2000

Persons Aged 25 to 34 in 2000

Rank	Metropolitan Area of Residence, 1995	Net Flow	Rank	Metropolitan Area of Residence, 1995	Net Flow
1	Los Angeles--Riverside-- Orange County, CA CMSA	3,595	25	Houston--Galveston--Brazoria, TX CMSA	126
2	San Francisco--Oakland-- San Jose, CA CMSA	1,675	26	Raleigh--Durham--Chapel Hill, NC MSA	126
3	Seattle--Tacoma--Bremerton, WA CMSA	1,021	27	Tampa--St. Petersburg --Clearwater, FL MSA	125
4	San Diego, CA MSA	890	28	Cincinnati--Hamilton, OH --KY--IN CMSA	122
5	Salt Lake City--Ogden, UT MSA	756	29	Buffalo--Niagara Falls, NY MSA	106
6	Chicago--Gary--Kenosha, IL-- IN--WI CMSA	622	30	Dallas--Fort Worth, TX CMSA	106
7	Sacramento--Yolo, CA CMSA	423	31	Atlanta, GA MSA	97
8	Denver--Boulder--Greeley, CO CMSA	396	32	Milwaukee--Racine, WI CMSA	95
9	New York--Northern New Jersey-- Long Island, NY--NJ	369	33	New Orleans, LA MSA	95
10	Washington--Baltimore, DC --MD--VA--WV CMSA	356	34	Columbus, OH MSA	92
11	Boston--Worcester--Lawrence, MA--NH--ME--CT CMSA	331	35	Oklahoma City, OK MSA	78
12	Minneapolis--St. Paul, MN --WI MSA	301	36	Memphis, TN--AR--MS MSA	74
13	Philadelphia--Wilmington --Atlantic City, PA--NJ--D	289	37	Orlando, FL MSA	57
14	Norfolk--Virginia Beach --Newport News, VA--NC MSA	268	38	Richmond--Petersburg, VA MSA	57
15	Detroit--Ann Arbor--Flint, MI CMSA	266	39	Grand Rapids--Muskegon--Holland, MI MSA	48
16	St. Louis, MO--IL MSA	222	40	West Palm Beach--Boca Raton, FL MSA	45
17	Cleveland--Akron, OH CMSA	191	41	Providence--Fall River--Warwick, RI--MA MSA	37
18	Indianapolis, IN MSA	164	42	Miami--Fort Lauderdale, FL CMSA	36
19	Hartford, CT MSA	163	43	Jacksonville, FL MSA	32
20	Austin--San Marcos, TX MSA	149	44	Portland--Salem, OR--WA CMSA	-
21	Kansas City, MO--KS MSA	147	45	Louisville, KY--IN MSA	(4)
22	Rochester, NY MSA	140	46	Nashville, TN MSA	(6)
23	San Antonio, TX MSA	138	47	Greensboro--Winston-Salem --High Point, NC MSA	(37)
24	Pittsburgh, PA MSA	127	48	Charlotte--Gastonia--Rock Hill, NC--SC MSA	(110)
			49	Las Vegas, NV--AZ MSA	(173)
			50	Phoenix--Mesa, AZ MSA	(223)

the West (Boise and Yuma). Portland has net in-migration of 25 to 34 year-olds from all of its competitor regions except Phoenix.

To summarize the Portland's area's ompetitive position, Table 37 shows the net migration of 25 to 34 year-olds between Portland and each of the other 49 largest metro-politan areas in the United States. Portland receives net in-migration from 43 other metropolitan areas and has net out-migration to 6 other metropolitan areas.



8

METRO PATTERNS:

Sub-Regional Location of the 25 to 34 Year-Old Population

So far, our analysis has focused on the differences in the distribution of the 25 to 34 year-old population among U.S. metropolitan areas. But there are also important variations in the distribution of the young adult population within metropolitan areas. To illustrate the patterns of settlement within the Portland metropolitan area, we undertake two disaggregations of the regional population: by county and by block group. County level data show the distribution of the population among principal political jurisdictions of the region, while block group data provide a much more fine-grained, neighborhood view of population patterns.

Table 38 shows the distribution of the Portland population in each of the metropolitan area's constituent counties and cities. We also aggregate this data to show the data for the Portland-Vancouver metropolitan area—the six county region that excludes the Salem metropolitan area. The Portland-Vancouver metropolitan area accounts for about five-sixths of the metropolitan area's total population and an even larger fraction of the region's 25 to 34 year-olds. Portland-Vancouver accounts for a much larger share of college-educated 25 to 34s (nine in ten) and 25 to 34 year-old Asians and African-Americans (nineteen of twenty).

Two of region's three largest counties—Multnomah and Washington—account for half of the Portland-Vancouver metropolitan area's population but three-quarters of its college-educated 25 to 34 year-old adults. The number of college-educated 25 to 34 year-olds increased in every county in the region between 1990 and 2000, but 26,000 of the 33,000 total increase was in Washington and Multnomah Counties.

Table 39 illustrates the distribution of the region's principal demographic groups by county for 1990 and 2000. Multnomah County clearly has the most diverse population in the region; it accounts for three-fifths of the region's African-Americans and half of its Asians in the 25 to 34 year-old age group. The 25 to 34 year-old African-American population is more dispersed throughout the region than it was in 1990, with a decline in young African-Americans in Multnomah County and increases in most other counties. The region's Hispanic young adult population is dispersed almost evenly between Marion, Multnomah and Washington Counties.

Block group data provide a much more fine-grained, neighborhood view of population patterns. The young adult population is represented in virtually every block group in the region. We evaluated the difference between neighborhood level locations of the 25 to 34 year-old population and the rest of the region's population by computing the dissimilarity index using block group data. The dissimilarity index measures the difference in the distribution of two populations. The index measures what fraction of a sub-group's population would have to move population to a different neighborhood in order for sub-group's population be distributed among neighborhoods in exactly the same proportions as persons not in the sub-group. The dissimilarity index for Portland's 25 to 34 year-old population compared to all persons not in this age group in 1990 was 11.9 percent. In 2000, the dissimilarity index increased to 16.0 percent, implying that over the decade the residential locations of 25 to 34 year-olds had diverged substantially from those of the overall population.

Figure 20

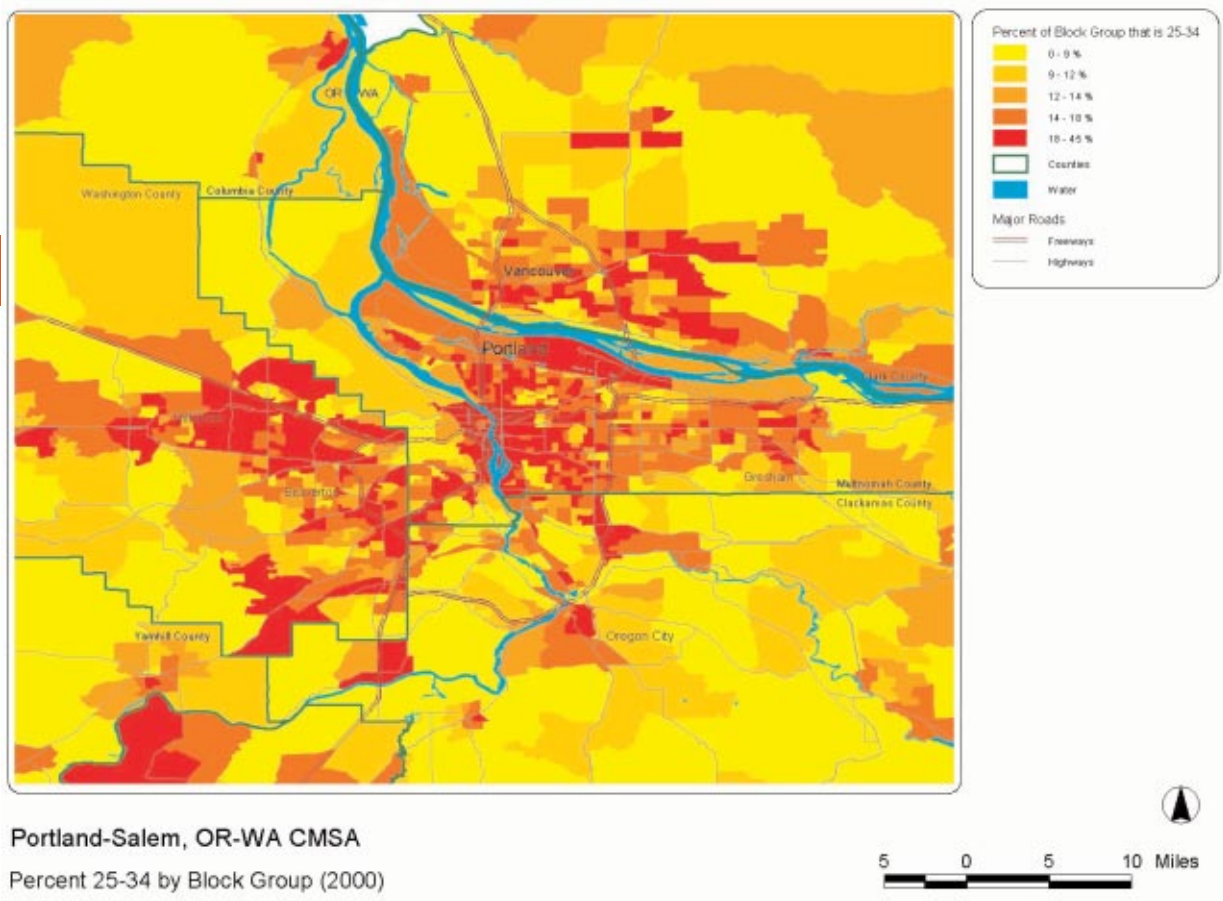


Figure 21

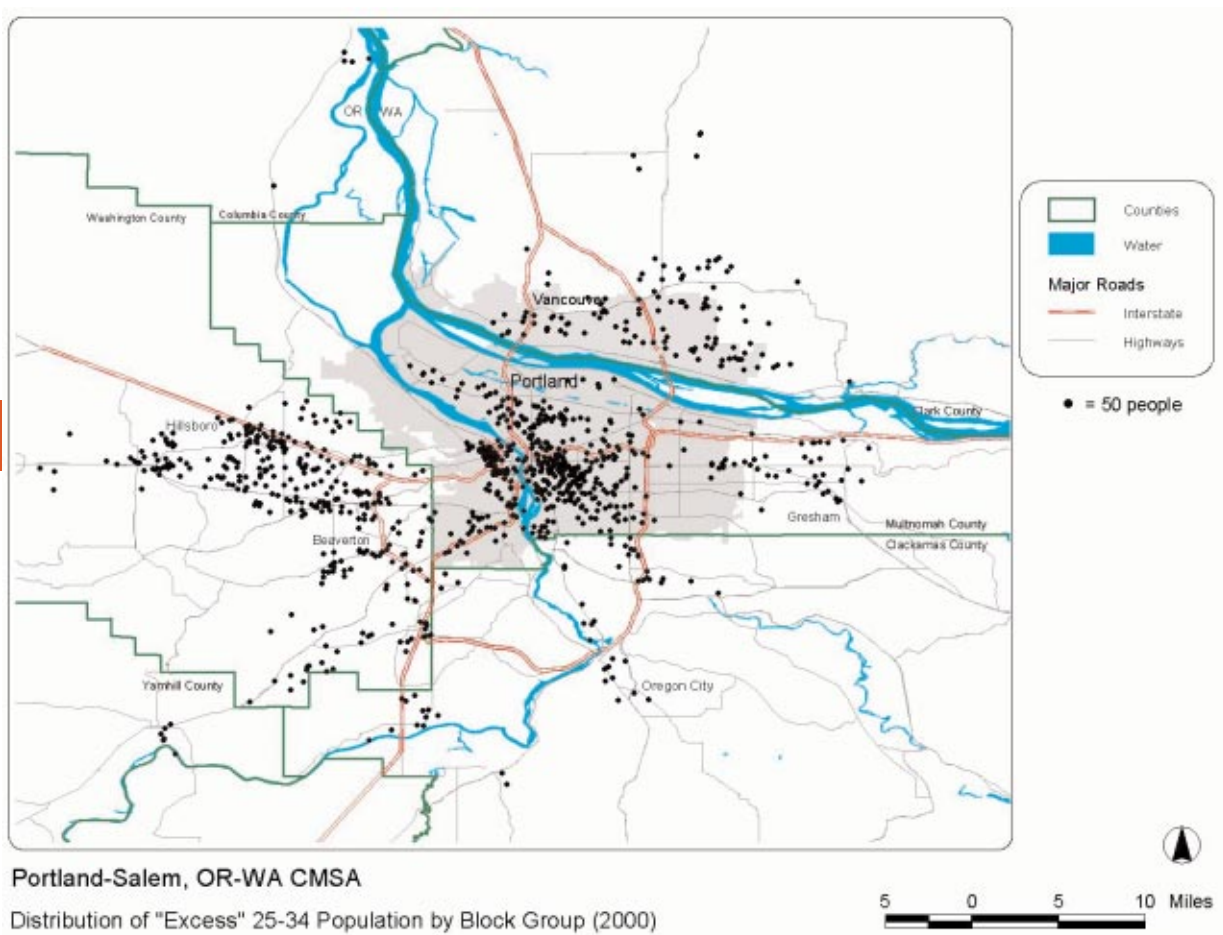


Table 39:
POPULATION BY AGE AND COLLEGE ATTAINMENT
PORTLAND METROPOLITAN AREA, BY COUNTY, 1990 AND 2000

County	All Age	25 to 34 Years	College
1990			
Clackamas County	278,850	42,051	8,945
Columbia County	37,557	5,429	520
Marion County	228,483	37,127	5,332
Multnomah County	583,887	108,305	25,288
Polk County	49,541	6,616	1,075
Washington County	311,554	58,791	17,959
Yamhill County	65,551	9,999	1,371
Clark County	238,053	39,475	6,227
Portland-Salem, OR-WA CMSA	1,793,476	307,793	66,717
Portland-Vancouver, OR-WA PMSA	1,515,452	264,050	60,310
Salem, OR PMSA	278,024	43,743	6,407
2000			
Clackamas County	338,391	40,507	10,221
Columbia County	43,560	5,141	707
Marion County	284,834	39,691	6,150
Multnomah County	660,486	115,936	40,735
Polk County	62,380	6,919	1,507
Washington County	445,342	76,594	28,654
Yamhill County	84,992	11,445	1,856
Clark County	345,238	48,954	10,261
Portland-Salem, OR-WA CMSA	2,265,223	345,187	100,091
Portland-Vancouver, OR-WA PMSA	1,918,009	298,577	92,434
Salem, OR PMSA	347,214	46,610	7,657
Change, 1990-2000			
Clackamas County	59,541	(1,544)	1,276
Columbia County	6,003	(288)	187
Marion County	56,351	2,564	818
Multnomah County	76,599	7,631	15,447
Polk County	12,839	303	432
Washington County	133,788	17,803	10,695
Yamhill County	19,441	1,446	485
Clark County	107,185	9,479	4,034
Portland-Salem, OR-WA CMSA	471,747	37,394	33,374
Portland-Vancouver, OR-WA PMSA	402,557	34,527	32,124
Salem, OR PMSA	69,190	2,867	1,250

We used this same data to measure the extent to which Portland's 25 to 34 year-olds were more or less likely to be located in central, as opposed to peripheral locations within the region. In general, our analysis of metropolitan areas selected for detailed analysis in our study shows a consistent pattern of 25 to 34 years-olds residing disproportionately closer to the center of the metropolitan area. We computed the fraction of the population aged 25 to 34 within 3 miles of the center of the city, for those living 3 to 10 miles from the city center, and those living more than 10 miles from the city center. Overall, about 15.2 percent of Portland's population was between 25 and 34 years of age in 2000. Within three miles of the central city, 23.8 percent of the population was between 25 and 34. On average, the concentration of 25 to 34 year-olds was about 52 percent higher within 3 miles of the center of the region than for the region as a whole. This suggests a strong tendency for young adults to prefer a location in the center of the region.

A more detailed view of the distribution of the 25 to 34 year-old population is provided in Figure 20, which shows the fraction of the population in each block group in the Portland metropolitan area that is between 25 and 34 years of age. The lighter (yellow) shaded areas of the map have concentrations of young adults below the met-

ropolitan average; the darker (red) shaded areas have above average concentrations of young adults. (To better illustrate the concentrations of 25 to 34 year-olds at the neighborhood level, we have scaled these maps to show the central portion of the metropolitan area). Figure 20 illustrates several aspects of the residential patterns of young adults. First, concentrations of 25 to 34 year-olds are found in variety of places in the region—there is no single dominant pattern. Second, the greatest concentrations of young adults are arrayed along an east-west axis from Washington County through Multnomah County.

Because of variations in the physical size of block groups (those in the center of the city are smaller than those on the periphery) and in the density of population settlement, the shaded maps shown in Figure 20 don't tell us much about how many 25 to 34 year-olds live in different parts of the region. To better illustrate the concentrations of young adults within the region, we computed the "excess" number of 25 to 34 year-olds living in each Census block group. Our measure of excess residents is related to the dissimilarity index described above. For each block group in the region, we computed the number of 25 to 34 year-olds that would live in the block group if 25 to 34 year-olds were distrib-

uted in exactly the same proportions as the rest of the metropolitan area's population. For example, if a particular block group accounted for 1 percent of the region's population, we assumed that 1 percent of the region's 25 to 34 year-olds would live in the block group. If the actual number was higher than this predicted value, we counted those residents as "excess."

Figure 21 maps these counts of excess 25 to 34 year-olds in block groups to show the patterns and intensity of clustering of the young adult population in the region. This map reveals two principal concentrations of 25 to 34 year olds, one in close-in neighborhoods in Portland (particularly Southeast Portland) and in Washington County (mostly between the Sunset Highway and the Tualatin Valley Highway). There are also smaller and more dispersed concentrations of young adults in Vancouver and East Multnomah County. Young adults are particularly under-represented in Clackamas County.

We can use this same technique to identify the principal concentrations of the region's college-educated young adults. Figure 22 shows the census tracts with higher than expected concentrations of college-educated 25 to 34 year-olds. These talented young adults are overwhelmingly concentrated in the city of Portland (in close-

Table 40:

25 TO 34 YEAR OLD POPULATION BY DEMOGRAPHIC GROUP PORTLAND METROPOLITAN AREA, BY COUNTY, 1990 AND 2000

County	White	African-American	Asian	Hispanic
1990				
Clackamas County	40,451	165	704	1,154
Columbia County	5,171	-	53	180
Marion County	33,117	432	659	3,624
Multnomah County	93,802	6,209	5,424	3,972
Polk County	5,991	58	112	499
Washington County	53,027	421	2,854	3,472
Yamhill County	9,254	116	133	823
Clark County	37,330	438	995	976
Portland-Salem, OR-WA CMSA	278,143	7,839	10,934	14,700
Portland-Vancouver, OR-WA PMSA	239,035	7,349	10,163	10,577
Salem, OR PMSA	39,108	490	771	4,123
2000				
Clackamas County	35,805	338	1,256	3,477
Columbia County	4,804	18	31	178
Marion County	29,741	441	935	10,169
Multnomah County	89,040	5,195	8,380	11,808
Polk County	5,887	5	139	1,150
Washington County	58,395	1,105	7,397	12,053
Yamhill County	9,451	189	184	2,203
Clark County	41,911	929	2,250	3,398
Portland-Salem, OR-WA CMSA	275,034	8,220	20,572	44,436
Portland-Vancouver, OR-WA PMSA	239,406	7,774	19,498	33,117
Salem, OR PMSA	35,628	446	1,074	11,319
Change, 1990-2000				
Clackamas County	(4,646)	173	552	2,323
Columbia County	(367)	18	(22)	(2)
Marion County	(3,376)	9	276	6,545
Multnomah County	(4,762)	(1,014)	2,956	7,836
Polk County	(104)	(53)	27	651
Washington County	5,368	684	4,543	8,581
Yamhill County	197	73	51	1,380
Clark County	4,581	491	1,255	2,422
Portland-Salem, OR-WA CMSA	(3,109)	381	9,638	29,736
Portland-Vancouver, OR-WA PMSA	371	425	9,335	22,540
Salem, OR PMSA	(3,480)	(44)	303	7,196

in neighborhoods), and in a variety of locations throughout Washington. Relatively few college-educated 25 to 34 year-olds live in Clark County and Clackamas County (especially east of the Willamette River). We estimate that 54 percent of the 25 to 34 year-olds living within 3 miles of the center of downtown Portland have a four-year degree or higher education, nearly double the regional average level of young adult educational attainment.

We can repeat this analysis also for principal demographic groups within the 25 to 34 year-old population. In examining particular sub-groups of the young adult population we use the 25 to 34 year-old population distribution as our basis for computing the predicted number of persons in any demographic group that ought to be found in a particular block group. For example, if 1 percent of the region's 25 to 34 year-old population was found in a particular block group, we would predict that 1 percent of the region's 25 to 34 year-old Hispanic popu-

lation would be found in that block group; if the actual count were higher, we would count each additional person as an "excess" resident. This analysis shows where particular demographic groups within the 25 to 34 year-old population are clustered within the region.

Figure 23 shows the geographic distribution of the metropolitan area's African-American young adults. They are primarily concentrated in close-in neighborhoods in the Northeast portion of the city of Portland.

Figures 24 and 25 show concentrations of young Hispanic and Asian adults. Both of these groups are relatively decentralized. Young Asian adults tend to be clustered in two parts of the region, in Washington County (between Beaverton and Hillsboro) and in outer-southeast Portland. The largest concentrations of young Hispanics are found in Hillsboro, Beaverton and East Multnomah County/Gresham.

Figure 22

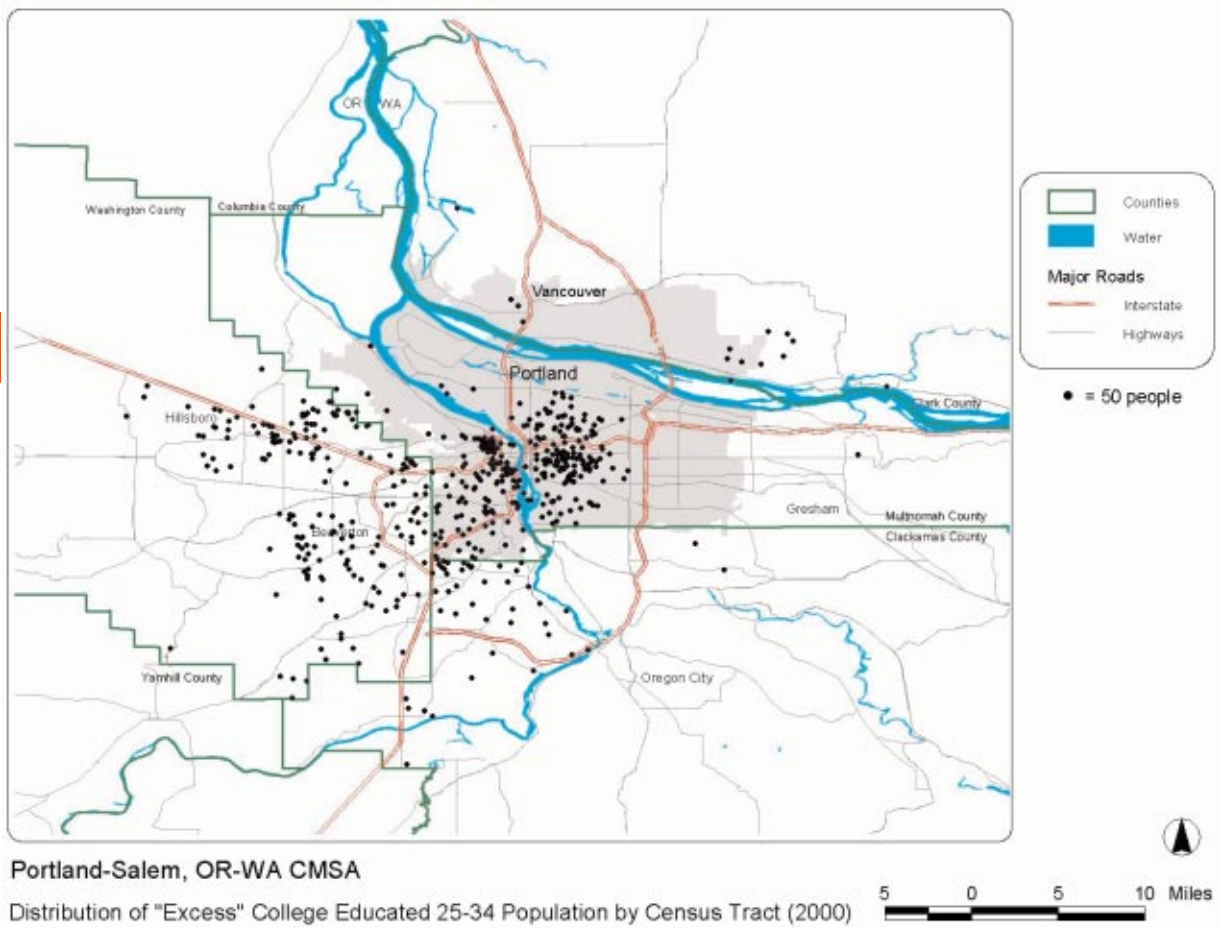


Figure 23

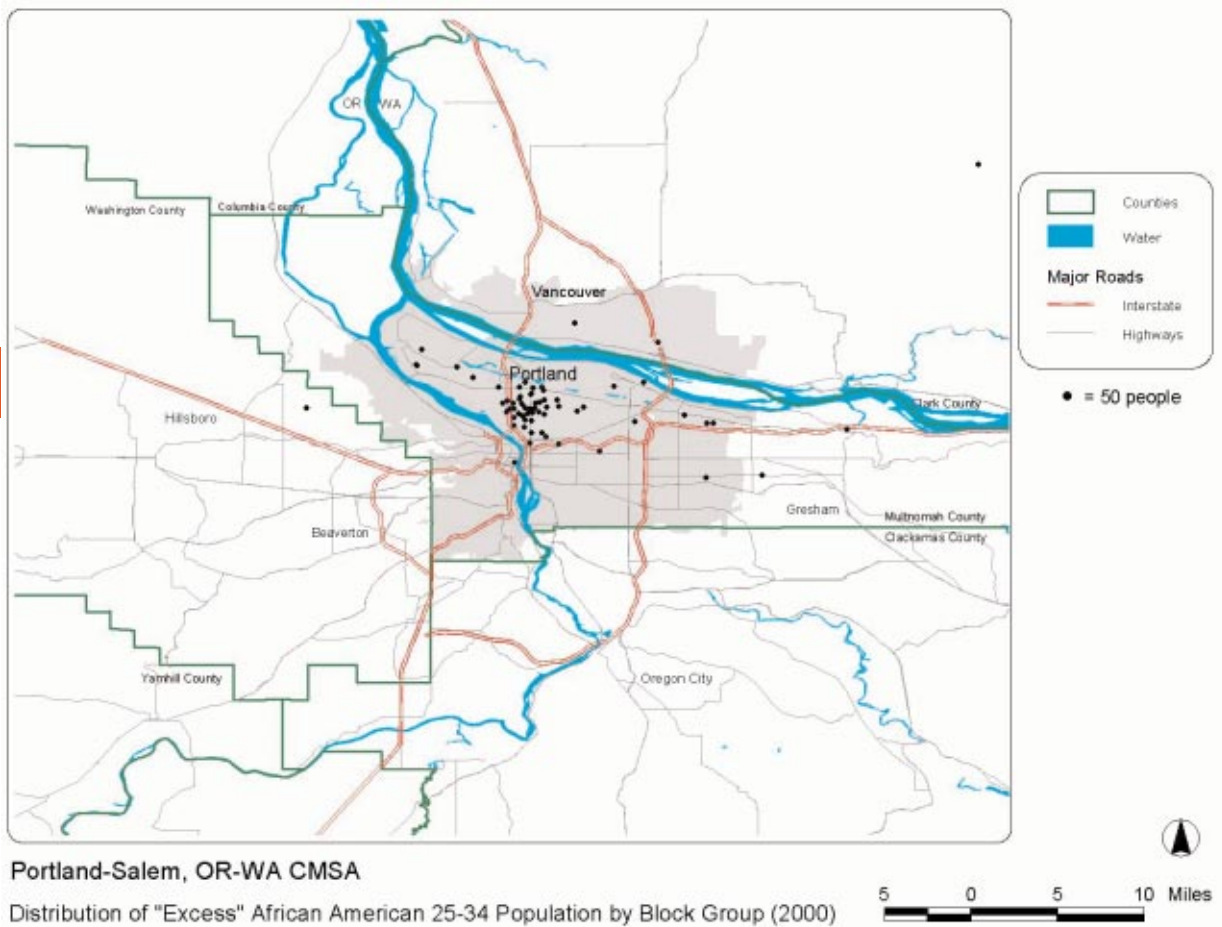


Figure 24

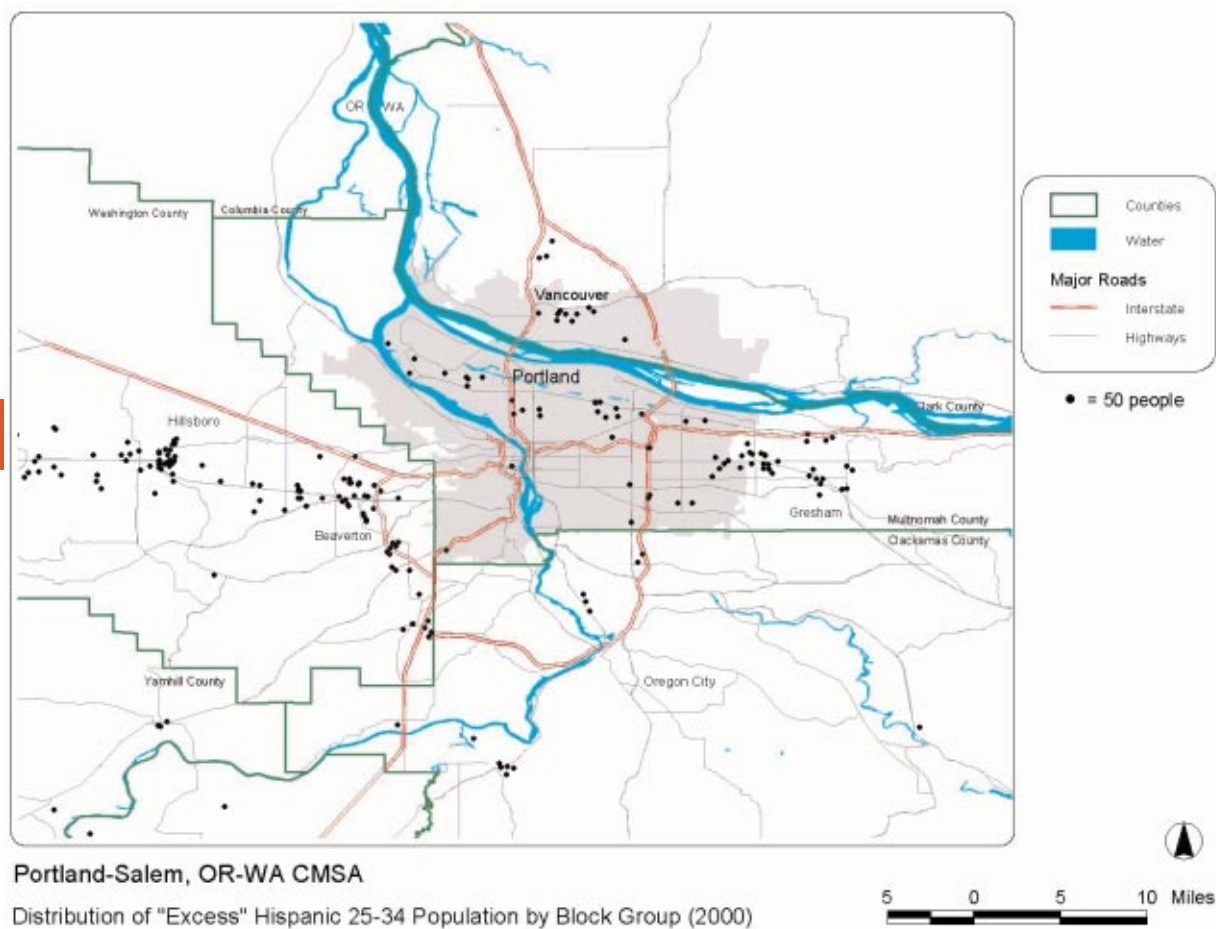
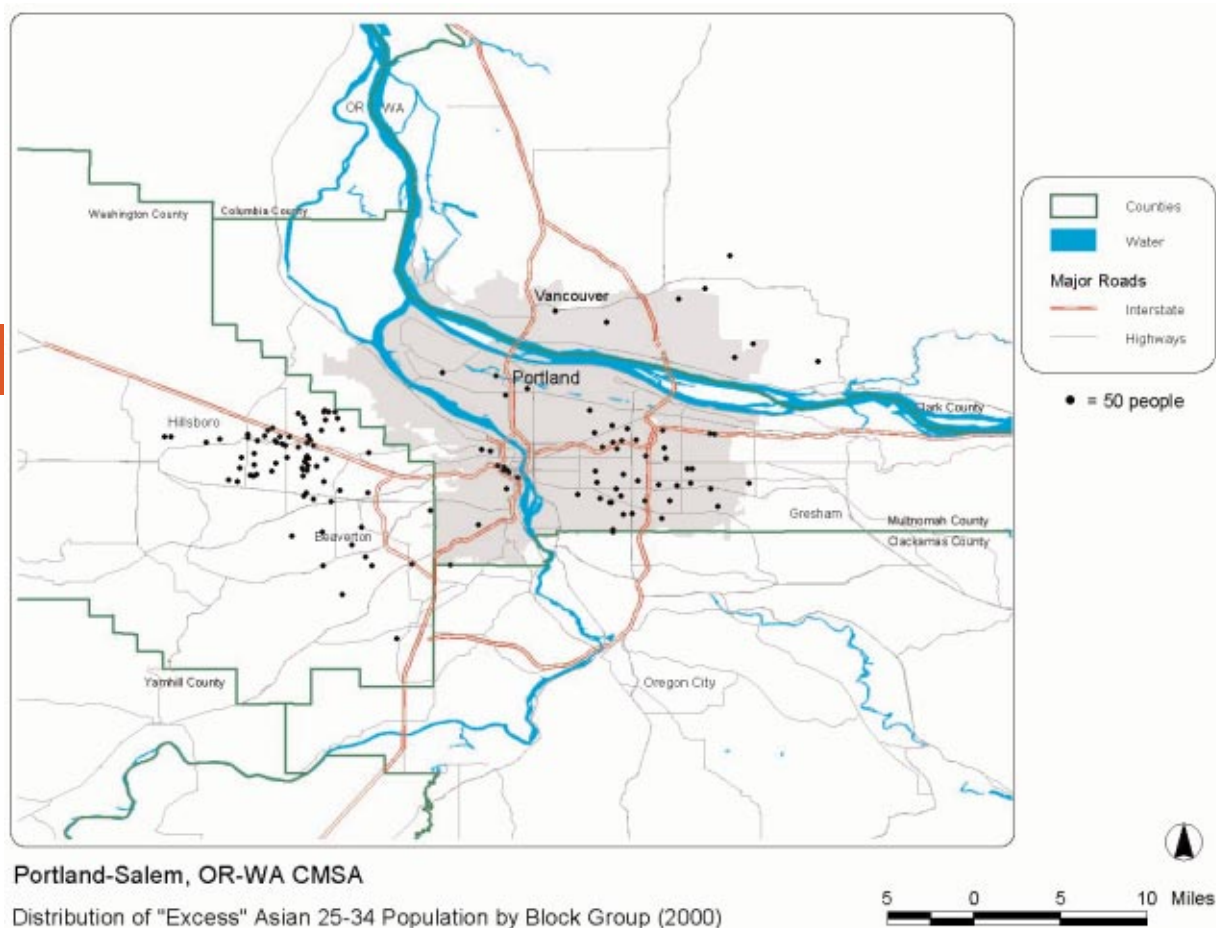


Figure 25



DATA SOURCES AND METHODOLOGY

DATA SOURCES

Data for this report are drawn from the 1990 and 2000 Censuses. In preparing the tables and figures presented in this report, we have used data tabulated by the Census Bureau, as well other tabulations of Census data prepared by third parties. The analysis and presentation of all data in this report were undertaken by Impresa, Inc.

The principal underlying source of data about 25 to 34 year-olds in U.S. metropolitan areas is the Census 2000 Summary File 3. These data were published by the Census Bureau in 2002 (Bureau of the Census, 2002).

In order to estimate the change in the 25 to 34 year-old population of U.S. metropolitan areas between 1990 and 2000, we relied on tabulations prepared by GeoLytics, Inc (GeoLytics Incorporated, 2002), (GeoLytics Incorporated, 2003). Geolytics has tabulated 1990 census data according to the geographic definitions used in the Census 2000. We supplemented these tabulations of data with reference to Census Bureau publications, particularly for the tabulation of educational attainment data by metropolitan area and county for 1990. We accessed these reports from the Census Bureau website (Bureau of the Census, 1993).

The Census Bureau produced a special database tabulating the migration of persons among counties in the United States (Bureau of the Census, 2003b). We used this data to document migration to and from metropolitan areas between 1995 and 2000.

To refine our analysis of the demographic characteristics of the 25 to 34 year-old population, we examined microdata drawn from the 2000 Census. These data were prepared and provided by the University of Minnesota (Ruggles & Sobek, 2003).

We mapped data for selected metropolitan areas using the Maptitude geographic information system software package (Caliper Corporation, 2001).

We also checked the most recent Census data on the age distribution of the population. The American Community Survey contains sample-based estimates of the age distribution of the population in 2002 (Bureau of the Census, 2003a).

CONCEPTS

Metropolitan area definitions and names. Our geographic unit of analysis for this study is metropolitan areas. We look at the 50 most populous metropolitan areas in the United States in 2000, as defined by the Office of Management and Budget, and based on the tabulations of Census 2000. Our list includes all metropolitan areas with a population of one million or more in 2000.

Our list includes a combination of metropolitan statistical areas and consolidated metropolitan statistical areas. Consolidated metropolitan statistical areas consist of two or more adjacent metropolitan statistical areas with substantial economic interconnections.

The task of computing the change in population of metropolitan areas was complicated by significant changes in the definition of metropolitan areas between the 1990 and 2000 Censuses. Newly urbanizing counties were added to several metropolitan areas, some metropolitan areas were merged, and other redefined, making it impossible to directly compare published results from the two Censuses. We have used 1990 data recast according to the 2000 metropolitan area definitions for our analysis. Subsequent to the publication of Census 2000 results, the Office of Management and Budget has published a new list of metropolitan areas based on new definitions, which will be used in future data gathering. We do not use that new classification system in this report.

In our tabulations of data, we include the official name of each metropolitan area, a title which usually identifies the principal cities in the metropolitan area—for example, the Portland--Salem, OR--WA MSA). For brevity, in our narrative and in figures, we generally shorten these names to a more manageable length—Portland—but in all cases our reference is to the entire metropolitan area.

Competitor Metropolitan Areas. We asked local project sponsors to identify up to six metropolitan areas that they regarded as competitors to Portland. We have highlighted these metropolitan areas in metropolitan comparison tables.

Birth-cohort and age group. Our primary interest is in the location patterns of persons aged 25 to 34. We're particularly interested in seeing how these location patterns have changed over time, and we rely on Census data from 1990 and 2000 to make these comparisons. Of course, the people who were 25 to 34 in 1990 are not the same people who were 25 to 34 in 2000. For clarity, it is helpful to label these two groups.

Persons aged 25 to 34 in 1990 were born between 1956 and 1965 (the tail end of the Baby Boom generation)—so we refer to them as the 1956-65 birth cohort. Persons aged 25 to 34 in 2000 were born between 1966 and 2000, and they are the 1966-75 birth cohort.

If we looked at the same birth cohort in 1990 and 2000, we would be looking at the same people, but at different stages in their life. The 1956-65 birth cohort would be 25 to 34 year-olds in 1990 and 35 to 44 year-olds in 2000. Because these same people are at a different stage in their life (marriages, relationships, careers, children, mortgages), we don't expect their behavior to be shaped by the same set of considerations that it was when they were in their late 20s and early 30s. Similarly, looking at the change in the location of the 1966-75 birth cohort between 1990 and 2000 would essentially capture the effect of their movement from the late adolescent-early college years (15 to 24) to the young adult years (25 to 34). Again, any observation of changing locational preferences here would be largely a factor of the process of individual aging and maturation, rather than indicative of new patterns of settlement.

Consequently, our analysis compares and contrasts the locational preferences of the 1956-65 birth cohort in 1990 (when they were 25 to 34) with the locational preferences of the 1966-75 birth cohort in 1990 (when they too were 25 to 34) to see how the preferences of people in this age group have changed over the past decade.

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SURVEY OF CITY GUIDES, WEB SITES. AND MARKETING MATERIALS

As part of the *Young & the Restless* analysis, a professional in marketing and public relations who is in the 25 to 34 year-old target demographic conducted web searches to determine an outsider's impression about the city. The web sites reviewed were the official web site of the city, the convention and visitor's bureau, and other sites that would contain general information on the community, rather than web sites devoted to specific institutions in the city.

To ensure consistency, the review centered on nine questions. Possible answers to questions one through eight were: not at all, somewhat, yes, and without a doubt. Answers to question nine were: very dated, dated, somewhat new, and new and very hip.

- 1) Does the material demonstrate ethnic/cultural diversity in the community?
- 2) Does the material show an active, contemporary cultural scene?
- 3) Does the material show people participating in active outdoor recreation?
- 4) Does it show young people enjoying the city?
- 5) If the name of the city were taken off of the materials, would you know where you were? Is there a unique sense of place demonstrated in the materials?
- 6) Does the material show an active urban lifestyle (focus on urban design, pedestrian traffic, mass transit, busy city streets)?
- 7) Are unique neighborhoods highlighted and promoted?
- 8) Is the music/bar/nightlife scene of the city shown?
- 9) Does the city portray a dated or new image of itself?

OVERALL RECOMMENDATIONS FOR PORTLAND:

Portland does a fantastic job of promoting its diversity and obvious tolerance for diversity, its unique neighborhoods, its distinctive landmarks and architecture, etc. – all of which are major attractors of the target demographic. The only criticisms of the materials on Portland are that a) more people need to be shown enjoying the places that make Portland such a great city and b) it would be nice to see more of Portland's night life. Based solely on the materials, it would appear Portland might shut down at night.

I was extremely impressed to see the ethnic tours of the city and the pamphlet geared exclusively toward the bisexual, gay and transgender communities. This is a first in this study of multiple cities.

Hillsboro, on the other hand, needs to let people know what its assets are and also sell them by showing people enjoying these assets. Hillsboro should stray from promoting its strip malls and chain restaurants as these

things can be found in nearly every city in the country. Instead, the city should identify and promote that which is unique to the community.

PORTLAND VISITORS ASSOCIATION

Quick references to attractions, bridges and fountains, the arts, sports etc. Also includes pamphlet guides to the arts and ethnic groups.

- 1) Does the material demonstrate ethnic/cultural diversity in the community?
_ Not at all _ Some what _ Yes ☒ Without a doubt
One of the pamphlets is titled "Gay Oregon" and is a guide to Gay, Lesbian, Bisexual and Transgender activities, hangouts, bookstores, shops, neighborhoods and culture. It also includes pamphlets on ethnic neighborhoods and culture.
- 2) Does the material show an active, contemporary cultural scene?
_ Not at all _ Some what ☒ Yes _ Without a doubt
Art galleries, dance, music, festivals, etc. are all clearly shown in the materials.
- 3) Does the material show people participating in active outdoor recreation?
_ Not at all _ Some what _ Yes ☒ Without a doubt
The magazine in the packet features an entire section on outdoor recreation including mountain climbing, kayaking, biking, etc. plus guides for day trips and activities nearby.
- 4) Does it show young people enjoying the city?
_ Not at all _ Some what ☒ Yes _ Without a doubt
It could show more active nightlife. There is a great photo of a couple at a posh restaurant that is really nice. But no club or bar scenes are shown.
- 5) If the name of the city were taken off of the materials, would you know where you were? Is there a unique sense of place demonstrated in the materials?
_ Not at all _ Some what ☒ Yes _ Without a doubt
If someone were familiar with landmarks, the geography, the skyline, fountains, the look of the light rail, the professional sports teams, yes.
- 6) Does the material show an active urban lifestyle (focus on urban design, pedestrian traffic, mass transit, busy city streets)?
_ Not at all _ Some what ☒ Yes _ Without a doubt
It shows a little of each thing, but not necessarily combined – there's a whole section on transit, but it does not show it being used. There is one shot of two women talking on the street in what looks like an urban neighborhood. I would suggest more action on the streets.
- 7) Are unique neighborhoods highlighted and promoted?
_ Not at all _ Some what _ Yes ☒ Without a doubt
Pamphlets in the packet direct people to different ethnic neighborhoods in the city and also highlights the Pearl District.

8) Is the music/bar/nightlife scene of the city shown?
☐ Not at all ☒ Some what ☐ Yes ☐ Without a doubt

9) Does the city portray a dated or new image of itself?
☐ Very Dated ☐ Dated ☐ Somewhat New ☒ New and Very Hip
The only criticism of the materials is the lack of people enjoying the city. Overall the package gives off a vibe of a progressive, eco-friendly, hip, open, tolerant place.

PORTLAND DEVELOPMENT COMMISSION

1) Does the material demonstrate ethnic/cultural diversity in the community?

☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt
Materials are heavily geared toward urban renewal business opportunities without a focus on people

2) Does the material show an active, contemporary cultural scene?

☐ Not at all ☒ Some what ☐ Yes ☐ Without a doubt
Materials are heavily geared toward urban renewal business opportunities without a focus on people. However, there is an attractive downtown piece included in the packet called "Downtown Portland Where Business Lives: Supporting a Vibrant, Prosperous Downtown Business Community" that gives a brief glimpse at everything downtown has to offer including arts and culture.

3) Does the material show people participating in active outdoor recreation?

☐ Not at all ☒ Some what ☐ Yes ☐ Without a doubt
Same as above

4) Does it show young people enjoying the city?

☐ Not at all ☒ Some what ☐ Yes ☐ Without a doubt
It shows people in general (not necessarily the target demographic) in the city and on the streets in a limited way.

5) If the name of the city were taken off of the materials, would you know where you were? Is there a unique sense of place demonstrated in the materials?

☐ Not at all ☐ Some what ☒ Yes ☐ Without a doubt
There is a heavy focus on redevelopment in neighborhoods that are distinctive to Portland. Anyone familiar with the neighborhoods would know where they were.

6) Does the material show an active urban lifestyle (focus on urban design, pedestrian traffic, mass transit, busy city streets)?

☐ Not at all ☐ Some what ☒ Yes ☐ Without a doubt
Not necessarily active, but existing. It's the nature of the packet. It does highlight mass transit and urban renewal areas. It does show some people on the streets. You see lovely streetscapes with buildings that are or have the potential to be revitalized including mixed use properties (storefronts with apartments above).

7) Are unique neighborhoods highlighted and promoted?

☐ Not at all ☐ Some what ☒ Yes ☐ Without a doubt
In the form of urban renewal projects.

8) Is the music/bar/nightlife scene of the city shown?
☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt

9) Does the city portray a dated or new image of itself?
☐ Very Dated ☐ Dated ☒ Somewhat New ☐ New and Very Hip
It shows progressive economic development initiatives. Overall the package is very effective for the intended audience.

HILLSBORO

Description of Materials: Packet of information from the Chamber of Commerce that includes a newsletter, visitor's and resident's guide and business guide

1) Does the material demonstrate ethnic/cultural diversity in the community?

☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt
Shows very few people at all and there is no evidence of cultural diversity in the materials.

2) Does the material show an active, contemporary cultural scene?

☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt

3) Does the material show people participating in active outdoor recreation?

☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt
It lists day trips but shows nothing but golfing.

4) Does it show young people enjoying the city?

☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt

5) If the name of the city were taken off of the materials, would you know where you were? Is there a unique sense of place demonstrated in the materials?

☐ Not at all ☒ Some what ☐ Yes ☐ Without a doubt
There is a farmer's market that appears unique to the city. Many of the images contained in the materials are of strip malls and Star Bucks and fast food chains – could be taken anywhere.

6) Does the material show an active urban lifestyle (focus on urban design, pedestrian traffic, mass transit, busy city streets)?

☐ Not at all ☒ Some what ☐ Yes ☐ Without a doubt
There is one small street scene shot and a section on its mass transit, but no photos of mass transit.

7) Are unique neighborhoods highlighted and promoted?

☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt

8) Is the music/bar/nightlife scene of the city shown?

☒ Not at all ☐ Some what ☐ Yes ☐ Without a doubt

9) Does the city portray a dated or new image of itself?

☒ Very Dated ☐ Dated ☐ Somewhat New ☐ New and Very Hip
With these materials as the guide, the city feels very generic and bland – very provincial and parochial.

ATTRACTING THE YOUNG AND THE RESTLESS: A Toolkit for Cities

DELIVER AN APPEALING REALITY.

Nothing is more important than delivering an appealing reality. Substance is what counts. Young people are very savvy in assessing cities. They use the Internet to get information and check facts. They are tied in to their own extensive networks of people with first-hand knowledge of how things really are. Personal contacts and networks shape the menu of choices when 25 to 34 year-olds consider moving from place to place. Finally, young people are mobile. They vote with their feet. You may be able to attract them, but if they don't like what they find – if the reality doesn't mesh with the marketing – they're going to move on. In fact, given the large number of people moving in and out of the metro area in any given year, the best opportunity to increase the 25 to 34 year-old population is to do a better job of hanging on to the people who already live in your community.

PUT VALUES ON DISPLAY.

Symbols matter. Develop ways in which the values of 25 to 34 year-olds are seen as obviously present. A city must not only welcome newcomers and new ideas. It must also find ways to make it apparent that it welcomes newcomers and new ideas. The same is true of all values expressed by 25 to 34 year-olds. Values get expressed in a variety of ways: what stories does the local media feature? What gets discussed at the chamber and other non-profits? Who participates in these organizations? What do public officials say and do?

KEEP IN TOUCH WITH FORMER RESIDENTS.

High schoolers who leave the region to attend college and college graduates who move elsewhere represent some of the best candidates to return to your city. Develop ways to stay in touch with them about current developments that would interest them. Make sure that you tap into the networks of connections that already exist with your expatriate young. Make sure that communications reflect their “voice,” and use methods more likely to resonate with 25 to 34 year-olds.

CREATE OPPORTUNITIES FOR CIVIC INVOLVEMENT.

Create opportunities for young people to participate on nonprofit and public boards. Seek out their opinions



on civic issues. Their voices must be deliberately sought out for their views to be considered, since they are the least likely adults to be “heard” on local issues.

USE INTERNSHIPS TO CONNECT WITH YOUNG ADULTS.

Internships with major public and private employers are an effective way to identify and introduce bright young adults to your region. Manage the interns' experiences so that while they are there, they connect with what's happening in the city and with other bright young adults.

SURVEY YOUNG ADULTS REGULARLY.

Survey young adults to assess their attitudes about the community. A periodic report can help identify the key issues on the minds of young adults and evaluate the community's progress toward addressing these issues. Supplement surveys with “exit interviews,” asking those who leave the community why they are choosing to leave.

CELEBRATE YOUNG ENTREPRENEURS AND CIVIC CONTRIBUTORS.

Make it clear that young people can be and are leaders in your city. Showcase their achievements in the media and as part of community celebrations and awards programs.

COMMUNICATE DEVELOPMENT PLANS TO YOUNG ADULTS.

If things are undone and development is lagging, young adults are likely to think no one is working on it. Worse, many believe that the way things are today is intentional. Someone must want it that way for it to be so. It is important to communicate plans for improving a city to young adults so that they can imagine progress and they can see that, indeed, someone is working on it. Be clear that you care about the future of your community and want young adults to play a prominent role in shaping it. If they don't feel like they have an opportunity to share in your community's future, many of them will exercise their option to find a community where they can make a mark.

PROMOTE YOUR CITY.

For a generation supposedly turned off to marketing, 25 to 34 year-olds repeatedly called for better marketing and more marketing of their cities. Unfortunately, place branding is a difficult challenge. It's hard to get it right. But smart young people believe their cities will benefit from good marketing efforts. Because so much information is spread friend-to-friend, family member-to-family member, it is critical that current residents are included in the target market. However, place marketing works best when it is based on authentic stories that people are willing to tell about their cities.

PROMOTE A YOUNG ADULT LIFESTYLE.

A review of materials shows that most cities appear to be afraid to promote their young people. If an active nightlife is shown, cities fear, it may scare off the soccer moms, as if everything has to be geared toward kids and families.

If cities are to attract 25 to 34 year-olds, they must show themselves to be places where young people can find friends, enjoy themselves and succeed.

Our results show young people care about both an exciting and engaging place to live now, and a community where they can become engaged, and if so inclined, someday raise a family. Don't make the mistake of assuming that one is the enemy of the other—both are on the minds of many young people.



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Economist Joseph Cortright of Impresa, Inc., led the quantitative research effort, examining Census and other data to pinpoint the movement and characteristics of the nation's 25 to 34 year-old population. Carol Coletta of Coletta & Company organized and conducted interviews and focus groups with the Young and Restless in five cities around the country, as well as interviews with human resource professionals and other informed observers of local labor markets.

The conclusions and opinions expressed in this report are solely those of Impresa, Inc., and Coletta & Company and do not necessarily reflect the views of project sponsors or funders.