South Portland Resident Survey Analysis

Total respondents: 390

<u>Economic Development Goals and Priorities</u>

1. **What are the three most important economic development goals for South Portland**?
    - N=390
    - 46.9% (183) selected Improve and revitalize South Portland's downtown area
    - 40.3% (157) selected Expand the city's tax base to generate revenue and limit growth in the residential tax rate
    - 35.9% (140) selected Improve and revitalize South Portland's waterfront
    - Environmental sustainability, diversifying the economy, and increasing the employment base also ranked highly (28-30%)

2. **Of the three economic development goals you selected, which is most important?**
    - N=377
    - 24.7% (93) selected Expand the city's tax base to generate revenue and limit growth in the residential tax rate
    - 16.7% (63) selected Improve and revitalize South Portland's downtown area
    - 11.1% (43) selected Improve sustainability of city's economy and businesses

   Of the three economic development goals you selected, which is second most important?
    - N=371
    - 16.7% (62) selected Improve and revitalize South Portland's downtown area
    - 16.4% (61) selected Improve and revitalize South Portland's waterfront
    - 11.3% (42) selected Diversify the city's economy, job, and tax base

While there is not an overwhelming consensus, a large plurality and concentration of respondents indicate that expanding the city's tax base, improving and revitalizing both the downtown and waterfront, diversifying the economy, and improving the sustainability of the economy.

The selection of these goals as important by residents aligns with stakeholder interviews: expanding the tax base, diversifying the economy, and improving neighborhood commercial areas were among the goals identified during interviews that saw strong support across interviews.

3. **Which areas of South Portland should be priorities for new economic development?**
    - N=382
    - 68.1% (260) selected Downtown/Mill Creek/Knightville
    - 46.6% (178) selected Waterfront
    - 44% (168) selected Main Street Corridor/South End (including the Rigby rail yard)

A majority of respondents would prioritize Mill Creek/Knightville/Downtown, followed by almost half citing the Waterfront and the Main Street Corridor. This is aligned with respondents' prioritization of location-based economic development goals – to revitalize the waterfront and downtown areas. Survey responses align with stakeholder interviews: interviewees noted a desire to see the implementation of the Mill Creek Master Plan and other development in Knightville, and activity around Rigby rail yard.

<u>Desired Type of Development</u>

4. Which types of new businesses/economic uses would you like to see in which areas?
- N=355

For each of the following areas of South Portland, indicate the type of new businesses/economic uses you would like to see in each area.								
Answer Options	Light Industry	Office/Service Business	Retail	Restaurants	Arts/Entertainment	Heavy Industry/Petroleum	Marine Uses	Response Count
Maine Mall/West of I-295	195	187	180	131	98	25	8	315
	62%	59%	57%	42%	31%	8%	3%	
Mill Creek/Knightville	24	170	252	277	258	8	73	344
	7%	49%	73%	81%	75%	2%	21%	
Broadway Corridor	64	191	171	153	107	15	17	283
	23%	67%	60%	54%	38%	5%	6%	
Waterfront	73	72	109	192	147	68	262	332
	22%	22%	33%	58%	44%	20%	79%	
Main Street/North End	161	169	130	105	70	55	32	289
	56%	58%	45%	36%	24%	19%	11%	
Main Street/South End	179	175	141	124	80	60	17	301
	59%	58%	47%	41%	27%	20%	6%	
							answered question	355
							skipped question	35

By Use:
- There is considerable support for office and service business uses across all areas except the waterfront.
- Light industry is favored along the Main Street corridor and the Maine Mall area.
- Retail development has the greatest support in the Mill Creek/Knightville, the Broadway Corridor, and the Maine Mall area, with over 40% favoring retail uses along Main Street.
- Restaurants are especially desired in Mill Creek/Knightville (81%) and to a lesser degree but still a majority on the waterfront and along Broadway.
- Arts/entertainment is also highly favored for Mill Creek/Knightville (75%) with the waterfront the second most preferred area (44%).
- There is very little support for new heavy industry/petroleum uses and for marine uses other than on the waterfront.

By Area:
- Respondents strongly want a retail/dining and entertainment center in Mill Creek/

Knightville.
- The waterfront is favored for marine uses and restaurants.
- In other areas, residents favor a mix of light industrial, office, retail and restaurants with the Maine Mall area less favored for restaurants, and Broadway less favored for light industry.

5. Which characteristics are most important for the businesses that South Portland should seek to attract and grow?
- N=355
- 72.7% (258) selected Will create good jobs (living wage pay, health insurance, other employee benefits)
- 51.3% (182) selected Is committed to environmentally sustainable practices
- 42.3% (150) selected Is a destination business that will attract people to South Portland
- 40% (142) selected Provides local goods and services that add to South Portland amenities

Which of the three characteristics you selected above is most important?
- N=347
- 45.2% (157) selected Will create good jobs (living wage pay, health insurance, other employee benefits)
- 15.6% (54) selected Is committed to environmentally sustainable practices
- 13% (45) selected Provides local goods and services that add to South Portland amenities

A majority of respondents believe that South Portland should attract and grow businesses that will create good jobs, commit to sustainable practices, and provide goods and services that add to South Portland amenities.

South Portland Assets and Weaknesses

6. Which of the following represent South Portland's strongest assets to support future economic development?   (Check up to five only)
- N=345
- 70.1% (242) Location with region and proximity to downtown Portland
- 47.2% (163) Waterfront infrastructure and access
- 40.9% (141) Mill Creek/Knightville downtown center
- 34.2% (118) Southern Maine Community College
- 29.9% (103) Business friendly reputation/image

A strong majority of respondents believe one of the city's greatest assets is its proximity to Portland and its location with the larger region. A concentration of respondents also believe that the waterfront and Mill Creek/Knightville downtown center are strong assets – and these responses align with earlier answers involving geographic strategies for revitalization efforts and economic investment.

Stakeholder interview responses support the resident survey: 44% of interviewees believed the

waterfront was an asset. A smaller percentage cited Knightville, proximity to downtown, and business friendly reputation. When asked about workforce and training, employers spoke positively about SMCC, though it was not listed explicitly as an asset by many interviewees.

7. Which of the following represent South Portland's greatest economic development challenges or weaknesses? (Check up to five only)
- N=341
- 46% (157) Local conflicts/differences over desired development
- 43.1% (147) Competition from other communities and economic centers
- 42.5% (145) Outdated commercial/business areas
- 40.8% (139) Traffic congestion
- 22.3% (76) Lack of available land for new development

A concentration of respondents were evenly split among the top challenges to South Portland, and indicated that conflicts over desired development, conflicts from other economic centers, outdated commercial areas, and traffic congestion as key concerns. A lack of land for new development was also indicated.

Some of these themes were also expressed in the stakeholder interviews. Interviewees also noted that a lack of developable land and differences over development as challenges.

Demographic Information on Respondents Compared to South Portland Population
Male/Female
- N=341
- 178 female (52%), 163 male (48%)
- In 2013, South Portland gender breakdown was 54% female, 46% male

Age
- N=340

What is your age?				
Answer Options	Response Percent	Response Count	2013 ACS Percent	2013 ACS Percentage, 20 and older
Under 18	0.0%	0	24.6%*	
18-24	1.5%	5	5.6%+	7.4%+
25-34	13.8%	47	13.3%	17.6%
35-44	20.0%	68	14.7%	19.5%
45-54	26.8%	91	14.5%	19.3%
55-64	20.3%	69	12.2%	16.2%
65 and older	17.6%	60	15.1%	20.0%
answered question		340		
skipped question		50		

    *Under 19, + 20 to 25

- The age breakdown of the South Portland Resident Survey respondents was not

representative of South Portland's actual population.
- The survey underrepresented younger South Portland residents, those below 34 years old and senior citizens, and overrepresented those 45 to 64. 15.3% of survey respondents were younger than 34 years old, whereas this age group comprises 43% of the city's actual population and over 26% of all adults. Conversely, 47.1% of respondents were between 45 to 64, whereas only 27% of the city's population and 35% of adults over 19 falls in that age range. The population 35 to 45 was the most representative cohort comprising 20% of respondents and 19.5 % of the population over 19.

Neighborhood residency of respondents

- N=339

Please select the neighborhood where you live or reside closest to:		
Answer Options	Response Percent	Response Count
Ferry Village	10.9%	37
Knightville / Mill Creek	13.0%	44
Willard	20.6%	70
Pleasantdale	3.5%	12
Outer Highland Ave	5.9%	20
Thorton Heights (Cash Corner to	5.9%	20
Redbank / Brickhill	2.1%	7
Meeting House Hill	16.2%	55
Brown's Hill (Evans to Cash Corner)	3.8%	13
Stanwood Park	2.7%	9
Country Gardens	3.8%	13
Meadow Glen	0.9%	3
Cash Park	1.2%	4
Sunset Park	0.9%	3
Sylvan Sites	2.9%	10
Other/not sure	5.6%	19
answered question		**339**
skipped question		**51**

- A high concentration of respondents live in Willard, Meeting House Hill, Knightville/Mill Creek, and Ferry Village. Residents in these four neighborhoods account for 60% of respondents.

Homeowner or renter

- N=335

Are you a:		
Answer Options	Response Percent	Response Count
Homeowner?	88.1%	295
Renter?	11.9%	40
answered question		**335**
skipped question		**55**

- The majority of respondents are homeowners – 88%, as opposed to renters, 11%. This stands in stark contrast to the census data, which shows 60% owners and 40% renters.

Tenure in South Portland
- N=339

How long have you lived in South Portland?		
Answer Options	**Response Percent**	**Response Count**
Less than a	5.3%	18
1-5 years	16.5%	56
6-10 years	16.8%	57
11-20 years	25.1%	85
21-40 years	24.2%	82
More than 41	12.1%	41
answered question		**339**
skipped question		**51**

Do you work in South Portland?
- N=337

Do you work in South Portland?		
Answer Options	**Response Percent**	**Response Count**
Yes	35.6%	120
No	64.4%	217
answered question		**337**
skipped question		**53**

Do you own a business in South Portland?
- N=343

Do you own a business in South Portland?		
Answer Options	**Response Percent**	**Response Count**
Yes	17.2%	59
No	82.8%	284
answered question		**343**
skipped question		**47**

Community workshop
- 101people provided their email addresses indicating interest in participation in the upcoming workshop