

NEOSCC

Mid-Point Survey

CONDUCTED JUNE 2013

Methodology

A mid-point survey of 610 residents in the 12-county Northeast Ohio region was conducted on behalf of the Northeast Ohio Sustainable Communities Consortium and its consultant, R Strategy Group by TRIAD Research Group. It was completed between June 7 and 12, 2013. The survey has a margin of error of $\pm 4.0\%$.

Comparisons between the results of this survey and the results of the benchmark survey conducted for NEOSCC in April 2012 with 802 adult residents of Northeast Ohio are shown where possible.

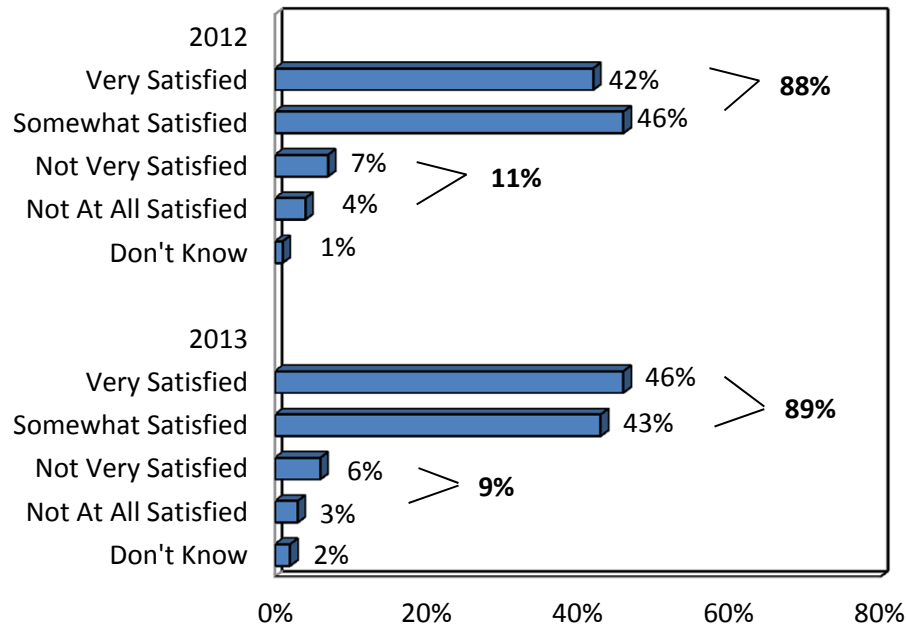
For this survey, a total of 610 interviews were completed with residents, 300 by telephone and 310 on-line. The results from the two survey modes were merged and then weighted demographically.

Current Situation

- Satisfaction with the Area
- Likelihood of Staying in the Area
- Recommend Area
- Things Important to Have in Area

MOST RESIDENTS CONTINUE TO BE SATISFIED WITH NORTHEAST OHIO AS A PLACE TO LIVE

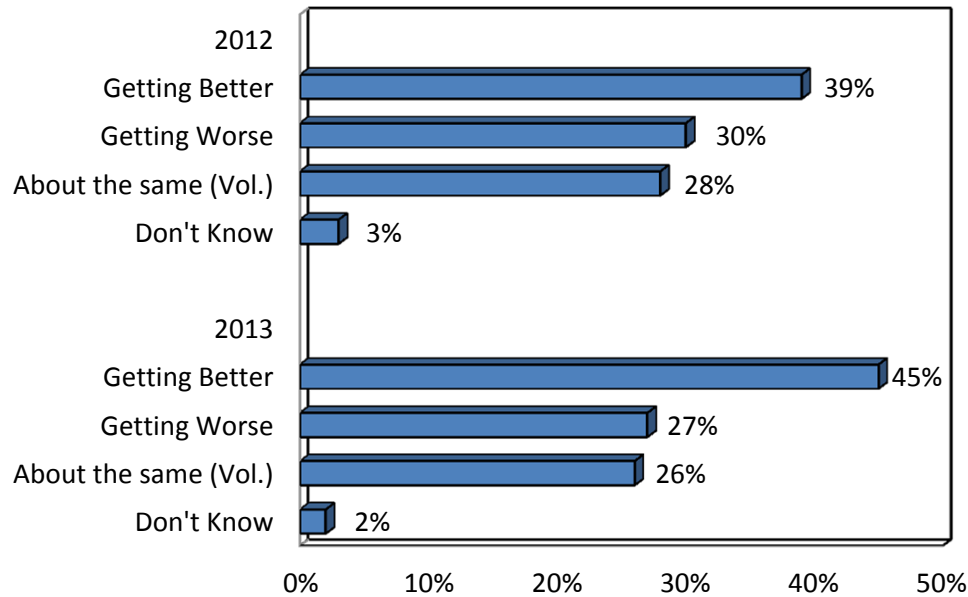
Q1 SATISFACTION WITH NORTHEAST OHIO AS A PLACE TO LIVE



- This time, 18 to 24 year olds were one of the groups most likely to be very satisfied with Northeast Ohio (51% vs. 22% in 2012) as were residents aged 50 to 64 (50%) and 65 and over (62%) while 25 to 34 year olds (28%) and 35 to 49 year olds (40%) were less apt to be very satisfied.
- Also this time, Cuyahoga County residents were just as likely to be very satisfied (54%) as those in Lake/Geauga/Portage counties (52%).

THIS YEAR, MORE RESIDENTS SAID THINGS IN NORTHEAST OHIO ARE GETTING BETTER THAN DID LAST YEAR

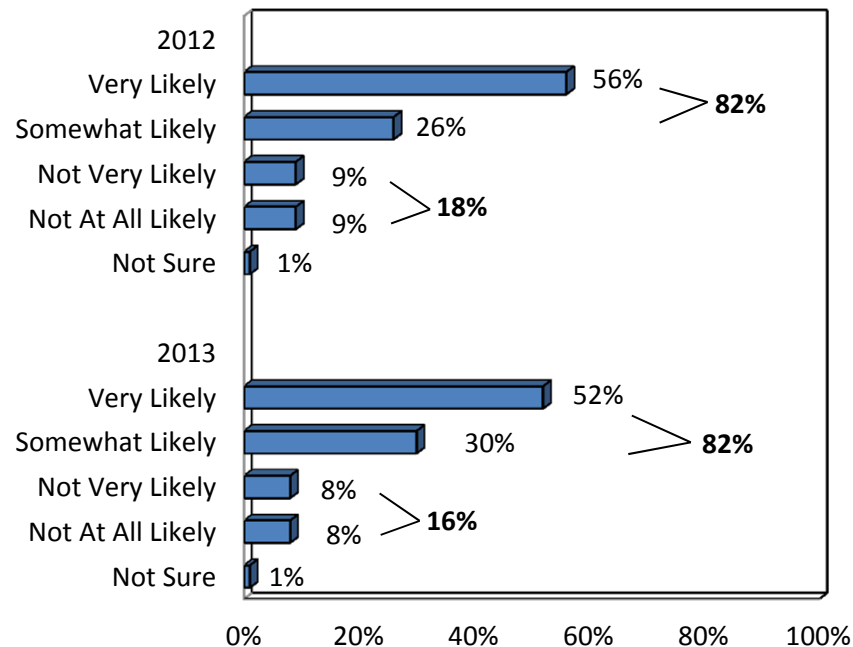
Q2 OPINION OF DIRECTION OF NORTHEAST OHIO



- There was a 6-point increase in the percent who said things in Northeast Ohio are getting better.
- This time, 52% of Cuyahoga County residents said things are getting better, up from 42% a year ago.
- Half of seniors (50%) and those with post graduate education (52%) think things are improving.
- Only a third of residents in the rural areas (33%) said things are getting better while 43% think it's getting worse.

ONCE AGAIN, FOUR-IN-FIVE RESIDENTS THINK IT IS VERY OR SOMEWHAT LIKELY THAT THEY WILL CONTINUE TO LIVE IN THEIR CURRENT AREA

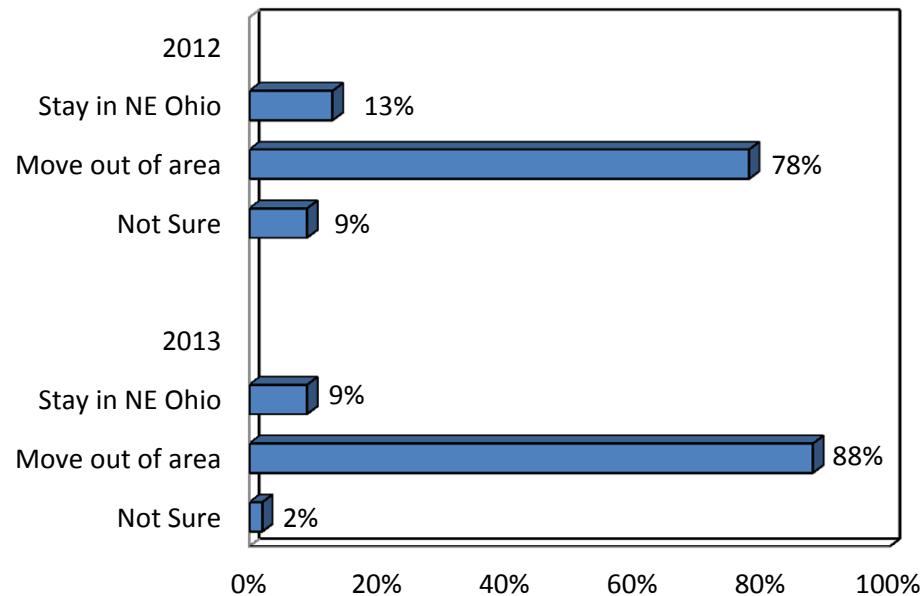
Q3 LIKELIHOOD OF CONTINUING TO LIVE IN YOUR AREA FOR THE NEXT TEN YEARS OR SO



- The percent very likely to stay in their current area increased with age from 29% among 18 to 24 year olds to 70% among those 65 and over.
- High school graduates (64%) and residents in urban areas (61%) were more apt to say they are very likely to stay in their area.

MOST OF THOSE WHO THINK THEY WILL LEAVE THE AREA PLAN TO MOVE OUT OF NORTHEAST OHIO

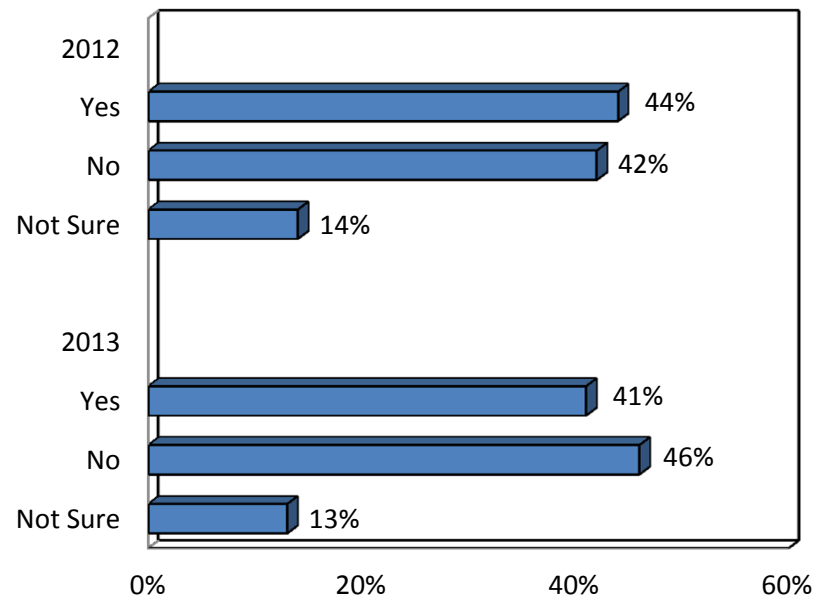
Q4 PLAN TO STAY IN NORTHEAST OHIO OR MOVE OUT OF AREA
(Of Those Not Very or Not At All Likely to stay in Northeast Ohio)



- When based on all 610 respondents, 15% of them are very likely or somewhat likely to move out of Northeast Ohio, and they were more likely to be under age 35 (30%), those who are self-employed or unemployed (28%) and Lorain/Medina residents (26%).

THIS TIME, SLIGHTLY MORE RESIDENTS SAID THEIR AREA DOES NOT OFFER THE KINDS OF THINGS THAT WILL KEEP YOUNG PEOPLE IN THEIR AREA THAN SAID IT DOES

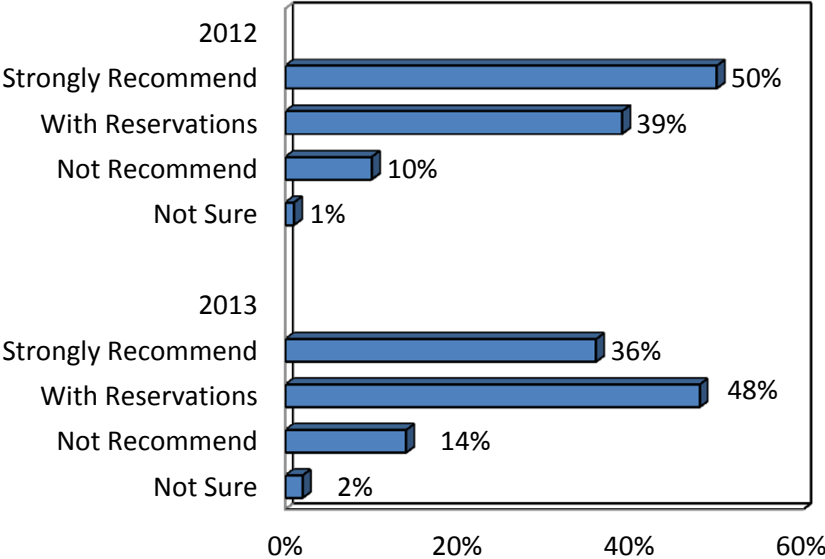
Q5 DOES AREA OFFER THE KINDS OF ADVANTAGES AND OPPORTUNITIES THAT WILL KEEP YOUNG PEOPLE IN AREA



- Residents of Cuyahoga (47% Yes, 42% No) and Lake/Geauga/Portage (54% Yes, 35% No) tended to say their area does offer the advantages and opportunities to keep young people here while those in the rest of Northeast Ohio were more apt to say it does not.
- By age, only seniors said Yes (52% Yes, 33% No).

FEWER RESIDENTS WOULD STRONGLY RECOMMEND THEIR AREA AS A PLACE TO LIVE THIS TIME

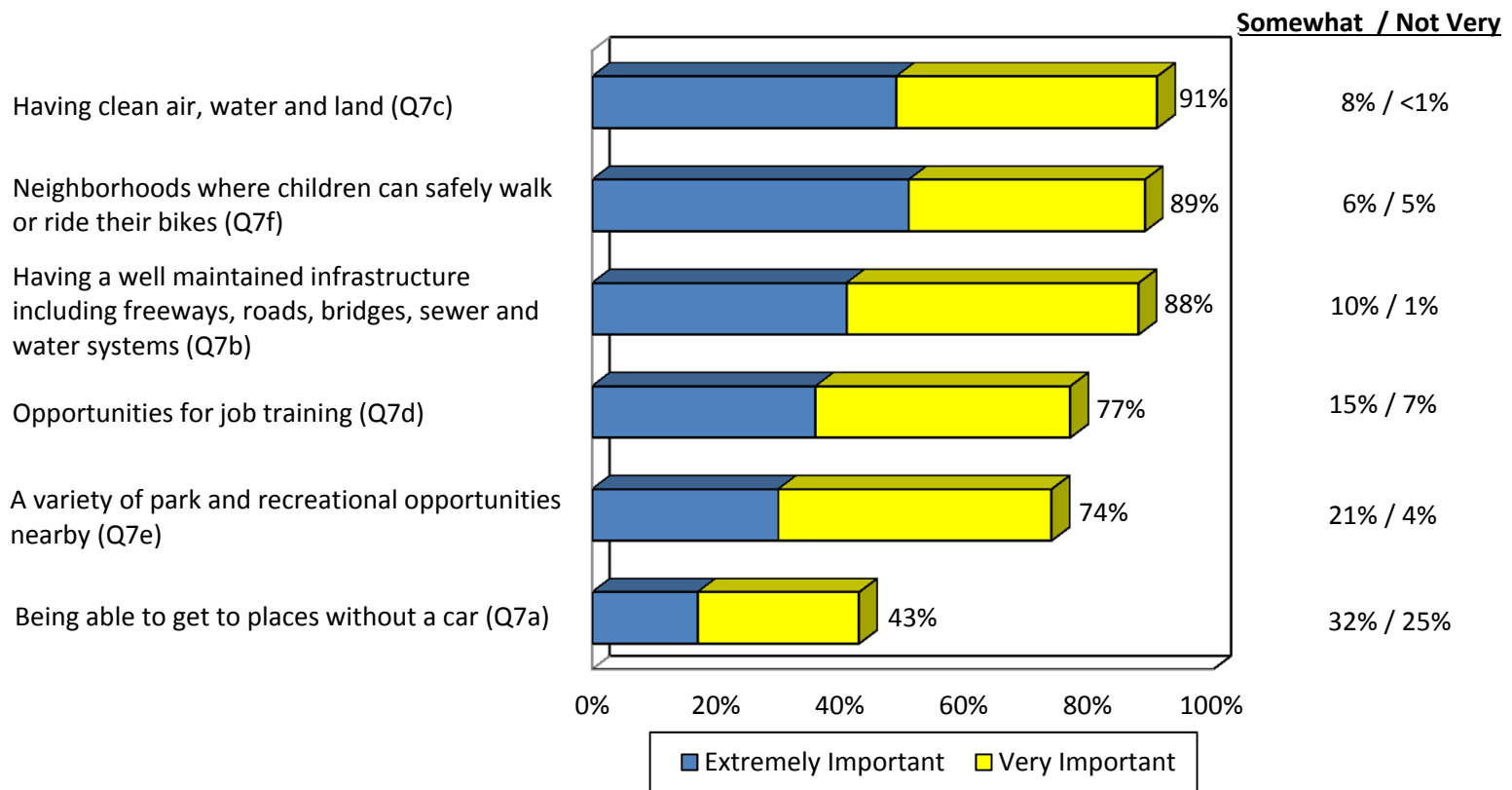
Q6 WOULD YOU RECOMMEND YOUR AREA AS A PLACE TO LIVE



- In this survey, unlike the benchmark survey, this question was asked just after the previous one about their area offering things to keep young people there and the result changed with more saying they would recommend their area with reservations (48%) than strongly recommend it (36%). The percent saying they would not recommend their area as a place to live increased only slightly (up from 10% to 14%).
- Two-fifths of residents in Cuyahoga County (43%) as well as Lake/Geauga/ Portage counties (41%) would strongly recommend their area compared to a third or less of those in the remaining counties.
- Here too more younger adults said they would not recommend their area as a place to live (20%).

A CLEAN ENVIRONMENT, SAFE NEIGHBORHOODS AND A WELL MAINTAINED INFRASTRUCTURE ARE MOST IMPORTANT TO RESIDENTS AND WHERE THEY LIVE

**Q7 IMPORTANCE RATING OF THINGS THAT MIGHT BE IMPORTANT
TO PEOPLE AND WHERE THEY LIVE**



Least important is being able to get places without a car.

Sustainability

- Definition
- Importance of Remaining Sustainable
- Priorities that Impact Sustainability

RESPONDENTS' DESCRIPTION OF SUSTAINABILITY VARIED

A tenth or more said to them sustainability means...

- Environment, natural resources – maintain/preserve/protect (17%)
- Keep community thriving/going (safe, good services) (13%)
- Ability to maintain what you have /quality of life (11%)
- To keep things moving, flourishing or thriving (11%) and
- Longevity, long lasting, long-term (11%).

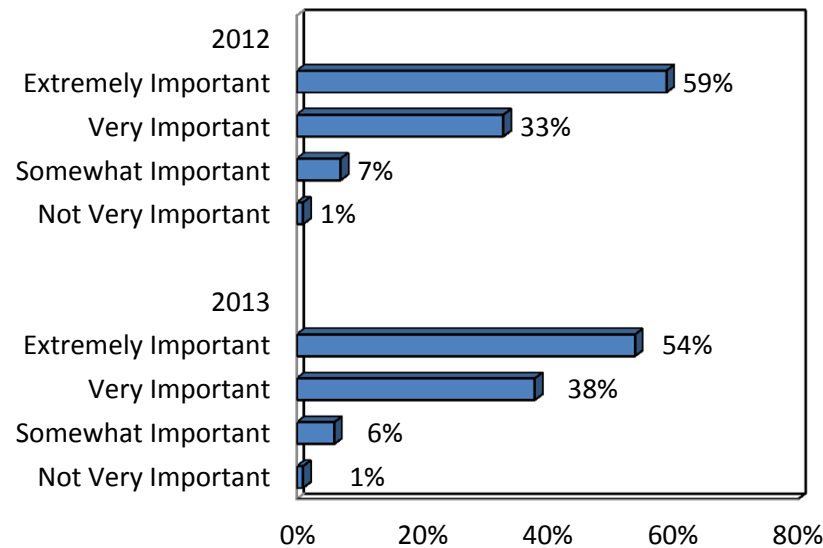
A smaller percent mentioned some other things related to sustainability, including it means continuing to live or grow without depleting resources (4%), ability to support itself/survive (6%), being 'green' (6%) and alternative energy sources (3%).

A few others mentioned something related to jobs or economic growth.

12% said they don't know what sustainability means.

OVER HALF CONTINUE TO SAY IT IS EXTREMELY IMPORTANT TO MAKE SURE NORTHEAST OHIO IS A SUSTAINABLE PLACE FOR FUTURE GENERATIONS

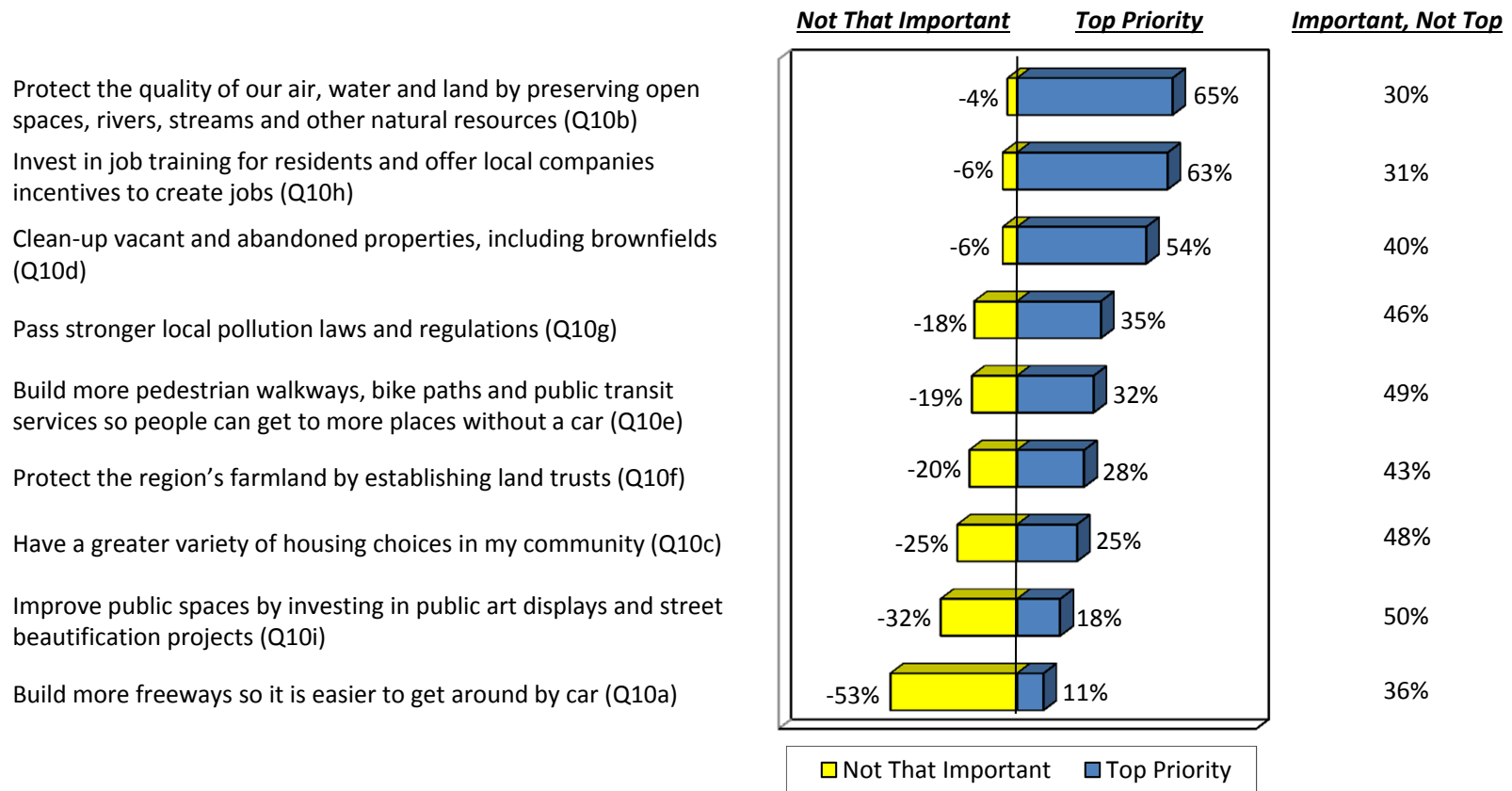
Q9 HOW IMPORTANT TO MAKE SURE NORTHEAST OHIO IS A SUSTAINABLE PLACE TO LIVE FOR FUTURE GENERATIONS



- About half or more of all demographic groups said it is extremely important that Northeast Ohio remain sustainable for the future.
- Residents in rural (67%) and urban (60%) areas were most likely to say it is extremely important to make sure Northeast Ohio remains a sustainable place to live while just 49% of those in suburban areas said extremely important.

THE TOP THREE PRIORITIES SEEN AS IMPACTING THE REGION'S SUSTAINABILITY WERE A CLEAN ENVIRONMENT, CREATING JOBS AND CLEANING UP VACANT PROPERTIES

Q10 PRIORITIES FOR THE AREA THAT IMPACT THE REGION'S SUSTAINABILITY



□ Building more freeways rated lowest with only 11% saying this should be a top priority.

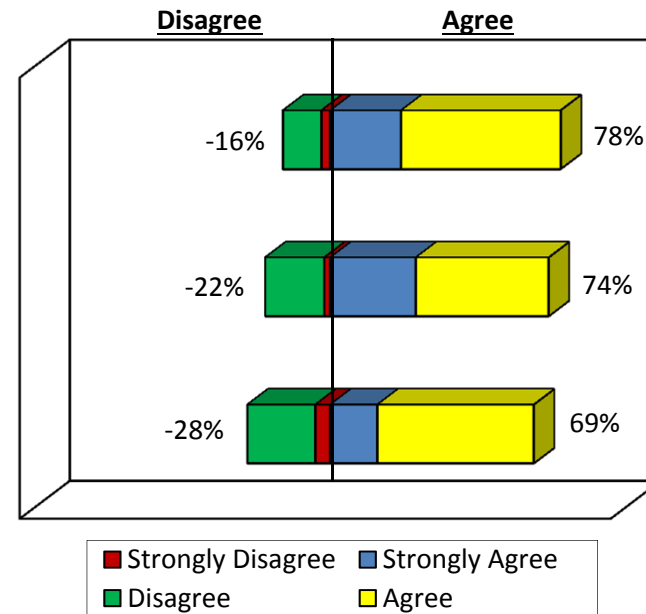
THERE IS CONSIDERABLE SUPPORT FOR MORE DEVELOPMENT NEAR TRANSIT STOPS AND MAINTAINING WHAT WE HAVE NOW

Q17 AGREE/DISAGREE STATEMENTS RELATED TO SUSTAINABILITY

Local governments need to do more to encourage development near existing transit stops so workers can take advantage of public transportation and reduce pollution. (Q17e)

It is more important to maintain and improve what we have now than to expand and build in new areas. (Q17d)

My community already has a wide variety of housing choices. (Q17f)



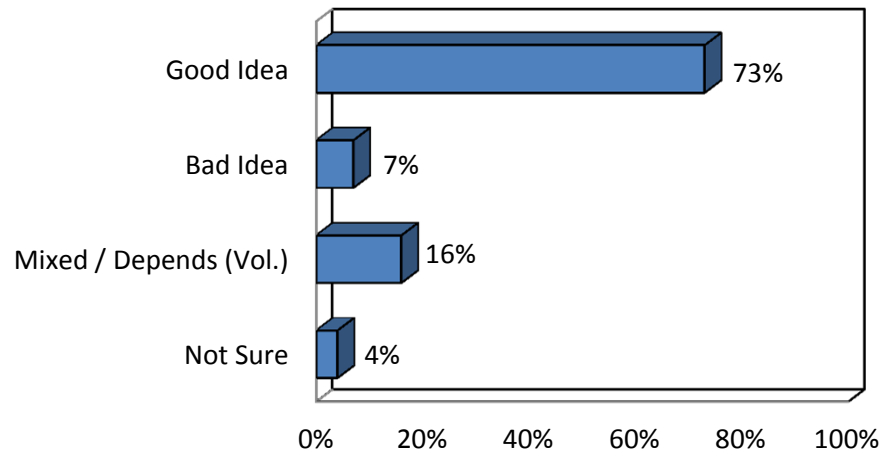
- A strong majority of all demographics groups agreed or strongly agreed with all three statements.
- More than two-thirds agreed that their community has a wide variety of housing (69%) and in the previous question, only 25% said having more housing options in their community should be a top priority.

Role of Government

- Opinion of Regionalism
- Opinion of Taxes
- Opinion of Incentives

THREE-FOURTHS THINK IT'S A GOOD IDEA FOR LOCAL GOVERNMENTS TO WORK MORE CLOSELY TOGETHER TO COMBINE SERVICES AND REDUCE COSTS

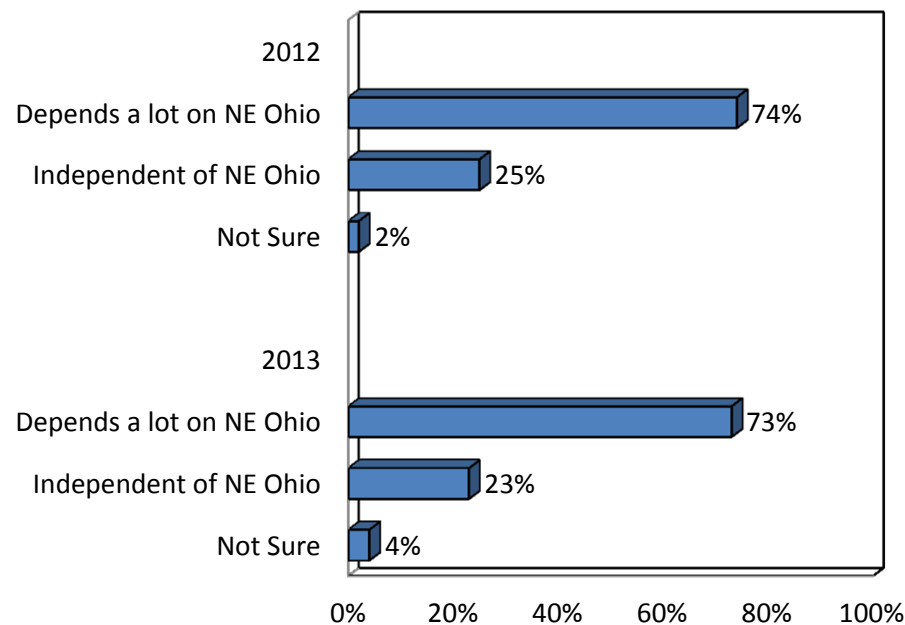
Q11 IS IT A GOOD IDEA OR A BAD IDEA THAT LOCAL GOVERNMENTS IN NORTHEAST OHIO WORK MORE CLOSELY TOGETHER TO COMBINE SERVICES AND REDUCE COSTS



- About two-thirds or more of every subgroup said it is a good idea that local governments in Northeast Ohio work more closely together to combine services and reduce costs.
- This percent was slightly lower among residents in rural areas (62%) and those under age 35 (64%).

THREE-FOURTHS CONTINUE TO SAY THEIR AREA'S ECONOMIC FUTURE DEPENDS A LOT ON THE REST OF NORTHEAST OHIO

Q12 DOES YOUR AREA'S ECONOMIC FUTURE DEPEND A LOT ON OR IS IT INDEPENDENT OF THE REST OF NORTHEAST OHIO



- Similar to the first survey, three-fifths or more of most demographic groups think that the economic future of their area depends on the rest of Northeast Ohio.
- But the percent saying their areas future depends a lot on the rest of Northeast Ohio was lower in the rural areas (55%).

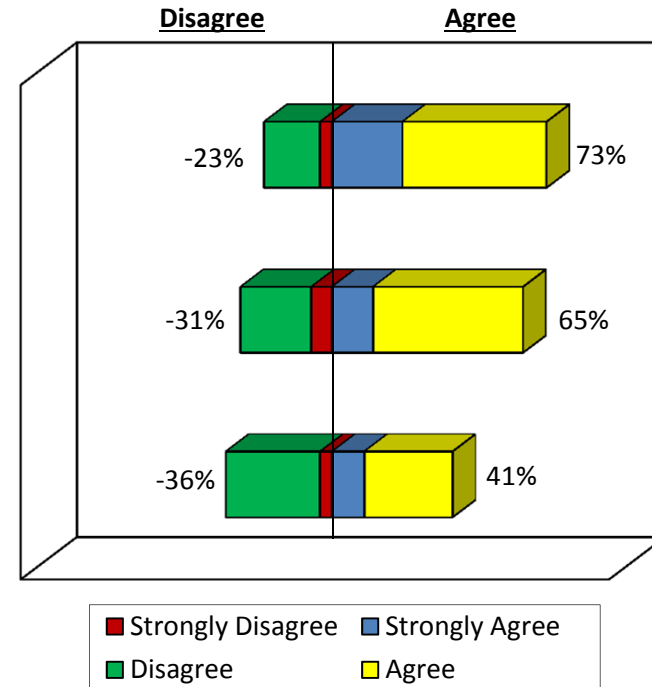
SIMILARLY, THREE-FOURTHS AGREED THAT NORTHEAST OHIO IS ONLY AS STRONG AS ITS CENTRAL CITIES

Q17 AGREE/DISAGREE STATEMENTS ABOUT TAXES AND GOVERNMENT

Northeast Ohio is only as strong as its central cities such as Cleveland, Akron, Canton and Youngstown. (Q17c)

The local services I get are worth taxes I pay. (Q17a)

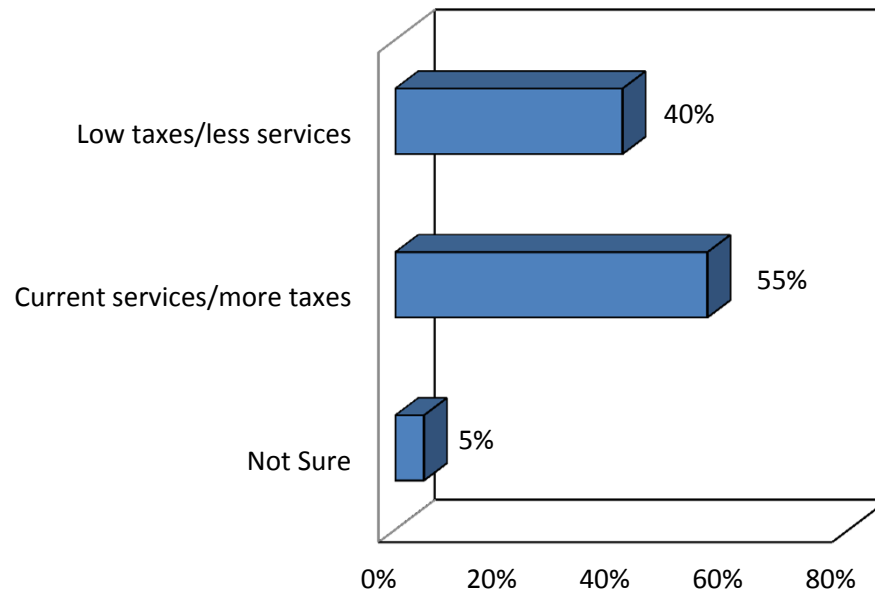
There are too many local development and zoning regulations that prevent business from expanding or moving to Northeast Ohio. (Q17b)



- Rural voters were least likely to agree that Northeast Ohio is only as strong as its central cities (55%).
- About two-thirds of most groups agreed that the local services they receive are worth the taxes they pay (65%).
- Urban voters were most likely to disagree (38% agree, 47% disagree) that there are too many zoning regulations that impact development.

A SLIGHT MAJORITY THINK IT'S MORE IMPORTANT TO MAINTAIN CURRENT COMMUNITY SERVICES EVEN IF IT MEANS PAYING MORE TAXES

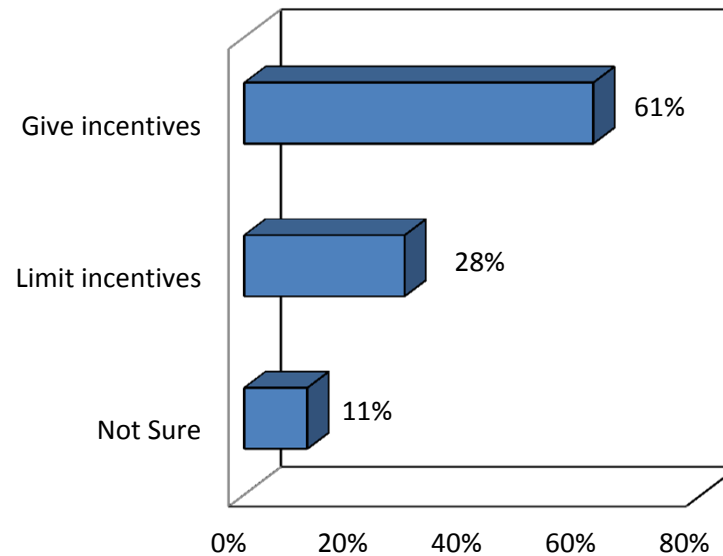
Q13 IS IT MORE IMPORTANT TO KEEP TAXES LOW EVEN IF IT MEANS SERVICES WOULD BE REDUCED OR TO MAINTAIN THE CURRENT LEVEL OF SERVICES EVEN IF IT MEANS PAYING MORE TAXES



- But a significant minority (40%) said it's more important to them to keep taxes low even if it means services in their community would be reduced.
- While most subgroups were slightly more apt to favor maintaining the current level of services and paying more, there were a few important exceptions including Lorain/Medina residents (51/47) and 50 to 64 year olds (48/46) who preferred paying less taxes.

THREE-FIFTHS THINK IT'S BETTER TO GIVE BUSINESSES TAX INCENTIVES TO LOCATE HERE

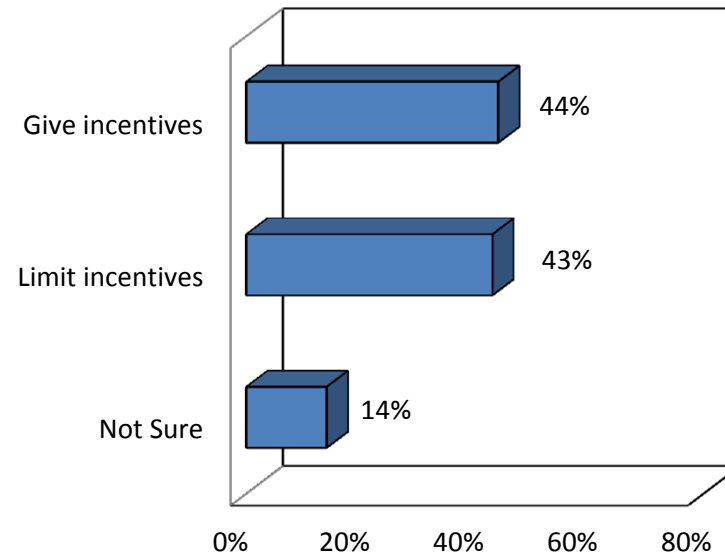
Q14 WHICH IS BETTER – GIVING TAX INCENTIVES TO BUSINESSES SO THEY LOCATE IN THE REGION OR LIMITING TAX INCENTIVES TO BUSINESSES TO SAVE TAXPAYERS MONEY EVEN IF IT MEANS THEY MIGHT NOT LOCATE HERE



- Only a fourth (28%) think it's better to limit tax incentives to businesses to save taxpayers' money even if it means businesses might not locate in their area.
- A majority of all subgroups, except 18 to34 year olds and those employed part-time, favored giving businesses tax incentives so they would locate in the region.

BUT JUST TWO-FIFTHS FAVORED GIVING DEVELOPERS TAX INCENTIVES TO BUILD IN THE REGION

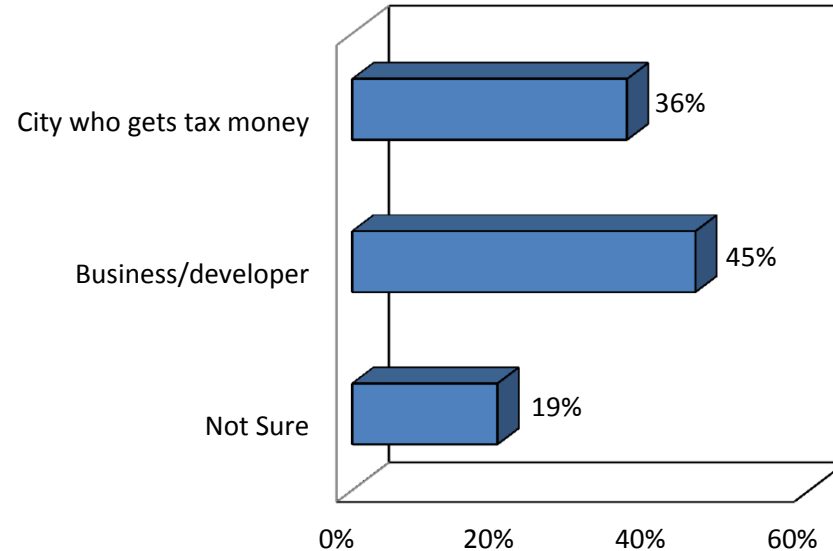
Q15 IS IT BETTER TO GIVE DEVELOPERS TAX INCENTIVES SO THEY BUILD IN THE REGION OR TO LIMIT TAX INCENTIVES TO DEVELOPERS TO SAVE TAXPAYERS MONEY EVEN IF IT MEANS LESS DEVELOPMENT



- Just as many (43%) said tax incentives to developers should be limited to save taxpayers money even if it means less development**
- Most subgroups were divided on this. But over half of residents in Lorain/Medina (52%) and Ashtabula/Trumbull/Mahoning (55%) favored giving developers tax incentives. These areas were also not as apt to say things are getting better.**

MORE THINK THE BUSINESS OR DEVELOPER SHOULD PAY FOR NEW INFRASTRUCTURE RATHER THAN THE CITY WHO RECEIVES THE TAX MONEY

Q16 WHEN A NEW BUSINESS OR DEVELOPER COMES TO THE REGION WHO SHOULD PAY FOR THE NEW INFRASTRUCTURE, THE CITY WHO RECEIVES THE TAX MONEY FROM THE DEVELOPMENT OR THE BUSINESS OR DEVELOPER



- Most subgroups were more apt to say the developer or business should pay for any new infrastructure that is needed.
- But in Lorain/Medina (47/43) and Ashtabula/Trumbull/Mahoning (46/37), slightly more said the city should pay for these improvements.

Key Findings

Satisfaction with Northeast Ohio as a place to live remains high (89%) and this time more said things are getting better (up from 39% to 45%). Thus, residents seem more optimistic.

Just as many said they are likely to stay in this area as last year (82% each), but they were less likely to strongly recommend the area to others (down from 50% to 36%). This is probably because we first asked them if the area offers the kinds of advantages and opportunities that keep young people here, and they were divided (41/46; yes/no). And in fact, younger people were less likely to say they will stay in the current area.

There was some consistency in what is important to the area where they live and their priorities for sustainability. That is, the three most important things to them were: 1) clean air, water and land (91%), 2) safe neighborhoods (89%) and 3) a well maintained infrastructure (88%).

Key Findings

Job training opportunities (77%) and park and recreational opportunities (74%) also ranked high in importance.

The top three priorities that impact sustainability were: 1) clean air, water and land by preserving our natural resources (65%), 2) job training and incentives to create jobs (63%) and 3) cleaning up vacant properties (54%).

Only between a tenth and a third rated the remaining six ideas for sustainability as a top priority. Note that even though clean air, water and land rated high, only 35% said stronger pollution laws should be a top priority and just 28% rated establishing trusts for the region's farmland a top priority.

Also, just a fourth (25%) said having a greater variety of housing choices is a top priority, while later, 69% agreed that their community already has a wide variety of housing choices.

Key Findings

With regard to transportation, residents did not rate being able to get to places without a car as that important to them (43% extremely or very). But neither did they think building more freeways should be a top priority (11%). Building more pedestrian walkways, bike paths, public transit rated higher (32%). And fully 78% agreed that local governments need to do more to encourage development near existing transit stops so workers can take advantage of public transportation and reduce pollution.

Importantly, 74% agreed that it's more important to maintain and improve what we have now than to expand and build in new areas. And 92% said it's extremely or very important to make sure Northeast Ohio is a sustainable place to live for future generations. And three-fourths continued to say that their area's economic future depends a lot on the rest of Northeast Ohio as well as agreed that Northeast Ohio is only as strong as its central cities.

Key Findings

Jobs are important to residents and 61% favored giving businesses tax incentives to locate here while 44% favored giving developers incentives to build in the region. However, residents did tend to think that the business or developer should pay for any new infrastructure that's needed rather than the city (45% vs. 36%).

Residents tend to have somewhat positive attitudes towards taxes. That is, 65% agreed that the local services they get are worth the taxes they pay. But at the same time, just over half (55%) said it's more important to maintain their current level of services even if it means paying more taxes while 40% think it's more important to keep taxes low even if it means reducing their services.

Three-fourths like the idea of local governments working together to combine services and reduce costs (73%).