

2006
Northeast Ohio Barometer
of Economic Attitudes

Fund for Our Economic Future

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EXECUTIVE SUMMARY

The Northeast Ohio Barometer of Economic Attitudes (NEO Barometer) is an annual measurement of the public's perception of the region's economic development progress. It also examines their opinions on regionalism and economic development initiatives. The 2006 survey represents the third installment of the NEO Barometer and includes fifteen counties: Ashland, Ashtabula, Carroll, Columbiana, Cuyahoga, Geauga, Lake, Lorain, Mahoning, Medina, Portage, Stark, Summit, Trumbull, and Wayne. The Gallup Organization, Cleveland State University, Team NEO, the Greater Cleveland Partnership and Kleinhenz & Associates serve as the design team for the NEO Barometer. Support is provided by the Fund for Our Economic Future. This collaboration aims to present both the public and decision-makers with information regarding community perceptions about the health of Northeast Ohio's economy and the connectivity residents have with this region.

MAJOR FINDINGS

Regional Identity. Residents of Northeast Ohio clearly think of themselves as belonging to the same region. Ninety-seven (97) percent consider their county to be a part of Northeast Ohio. When asked if they considered other cities in the survey to be part of Northeast Ohio, at least 60 percent of residents identified all of the cities in the 15-county region as belonging to the region. Cleveland (94 percent), Ashtabula (85 percent) and Mentor (83 percent) received the highest level of consensus that they are part of the region.

Loyalty. Twenty-three (23) percent of respondents felt Northeast Ohio was the best possible place to live. Only five percent said it was the worst. There was very little variation across counties although Ashland (35 percent saying best), Lake (32 percent) and Geauga (29 percent) were significantly more positive. Overall, 24 percent of Northeast Ohioans are extremely satisfied with the region, which is comparable to national findings. Ashland (37 percent extremely satisfied) and Geauga (36 percent) expressed the highest levels of satisfaction. Carroll and Columbiana (both 13 percent) had the lowest satisfaction levels.

Fifty-four percent of NEO residents said they were likely to stay. Carroll residents were the most likely to believe they would continue living in the county (69 percent) and Ashtabula residents were the least likely (44 percent). There were significant differences by race. Whites were the most likely to feel they were extremely likely to stay (57 percent) compared to only 42 percent of blacks and 39 percent of Hispanics.

Only 24 percent of residents, however, are extremely likely to recommend Northeast Ohio as a place to live. Northeast Ohioans have become less likely to recommend the region over the past three years. In December 2003, thirty-one (31) percent were extremely likely to recommend and by January 2005, this number was down to 27 percent.

Economic Conditions. Northeast Ohioans remain quite gloomy about the economic conditions in the region. Only 13 percent gave a positive rating to the economy while 46 percent responded with a negative rating. Forty (40) percent were neutral. Attitudes about the regional economy have remained more or less stable over the past year, although they have become significantly more negative in the Canton MSA (30 percent negative in 2005 compared to 47 percent negative this year).

The majority of residents (58 percent) believed the economy of Northeast Ohio is worse today than it was five years ago. Almost equal numbers of residents believe the economy will be better in five years (27 percent) as believe it will be worse (26 percent). The balance (48 percent) thinks it will be about the same.

Regional Assets. Northeast Ohioans rate highly many of the region's assets. The benefits for sports fans (44 percent rate these as very good) and the availability of outdoor parks, playgrounds and trails (40 percent very good) score the highest. The quality of colleges and universities (31 percent very good), the availability of cultural opportunities such as theater, museums, and music (31 percent very good) and the availability of quality health care (29 percent very good) are also rated quite high. On the downside, the climate (10 percent), job opportunities (11 percent), the quality of public schools (16 percent) and vibrant nightlife (16 percent) are rarely given the highest rating of "very good."

The majority of residents do not feel the region offers the advantages and opportunities that will keep young people and the most talented people from leaving the area for other places. Only 29 percent of Northeast Ohioans believe the region can compete to retain young and talented populations. However, the majority of Northeast Ohioans (58 percent) believe the region is a good or very good place to live for families with children.

Northeast Ohio's largest cities (Cleveland and Akron) rate several of their amenities higher than other U.S. cities. Both Cleveland and Akron rate their traffic levels and the availability of affordable housing much more favorably than other U.S. cities. Cleveland rates its public transportation much higher than cities on average and Akron rates its parks and green spaces higher than other cities. Their ratings of the availability of quality health care and cultural opportunities are comparable. Only the quality of public schools, nightlife, and job opportunities in these cities fell far short of the national findings.

Economic Development Efforts. Residents of the region are the most negative (59 percent negative) about the region's performance at keeping jobs from leaving the area. However, regional efforts to attract new businesses and helping existing businesses to grow are perceived more positively (33 percent and 32 percent negative, respectively).

When asked to choose between a series of trade-offs for economic development strategies, there was strong agreement across the region. Sixty-one percent felt re-training today's workers for new job opportunities would do more to improve the economy than encouraging more people to get college degrees. Sixty-three percent felt improving affordable housing throughout the region so workers can live near areas of

high job density was more important than improving access to public transportation so workers can get to job locations.

Regional Cooperation. Northeast Ohioans consistently demonstrate a strong support for regional cooperation. Over the past two years, responses have been stable and overwhelmingly in support of counties working together on a series of issues including supporting job creation (84 percent), developing an overall plan for economic growth (84 percent), supporting business (82 percent), attracting international businesses (77 percent), promoting tourism (75 percent), and training workers for new job opportunities (75 percent). The only issue which residents don't tend to support multi-county collaboration is on land-use planning (44 percent).

Regional Choices. Northeast Ohioans expressed strong support for a regional system of school funding. A clear majority, fifty-six percent, favored a system that would increase equity across public school districts even though it could be at the expense of wealthier school districts. The level of support remained constant across all four MSAs. Thirty-three (33) percent opposed regional school funding and the balance (11 percent) was not sure. Columbiana County and City of Cleveland expressed the most support (69 and 64 percent, respectively) and Carroll County the least (41 percent).

Northeast Ohioans had mixed opinions on whether fire and police services should be consolidated across jurisdictions to potentially save taxpayers money but at the expense of local control. Forty-seven (47) percent were in favor, forty-six (46) percent opposed, and the balance (7 percent) was not sure. Support was highest in the City of Cleveland (58 percent) and lowest in the counties of Ashland (30 percent) and Wayne (31 percent).

In general, support is low throughout the region for merging municipal governments with county government to have just one governing entity. Thirty-five (35) percent thought it would help their local area, fifty-six (56) percent thought it would hurt their local area and the balance (9 percent) was unsure. Support was highest in the City of Cleveland (51 percent) and lowest in the counties of Carroll (17 percent) and Wayne (17 percent). Minorities, especially Hispanics (56 percent), show stronger support for municipal consolidation than do whites (33 percent).

BACKGROUND

This is the Third Annual Northeast Ohio Barometer of Economic Attitudes (NEO Barometer). It measures the public's perception of the region's general economic development progress, as well as their opinions on regionalism and economic development initiatives. The Barometer design team is a community partnership of several local organizations including The Gallup Organization, Cleveland State University, Team NEO, the Greater Cleveland Partnership and Kleinhenz & Associates. It is supported by the Fund for Our Economic Future. This collaboration provides focus around a common goal to provide both the public and decision makers with information regarding community perceptions about the health of Northeast Ohio's economy and the connectivity residents have with this region.

Methodology

The Gallup Organization conducted 2,140 interviews in Northeast Ohio from March 6 - April 9, 2006. Approximately 100-200 interviews were conducted in each of 15 counties in the region, including Ashland, Ashtabula, Carroll, Columbiana, Cuyahoga, Geauga, Lake, Lorain, Mahoning, Medina, Portage, Stark, Summit, Trumbull, and Wayne counties. Additional interviews were conducted among residents of the cities of Cleveland and Akron. The data were weighted to reflect Census estimates for the region, based on county, gender, age, and race. In ninety-five out of 100 cases, results based on samples of 2,000 interviews can be expected to vary by no more than 2.2 percentage points (plus or minus the figure obtained) from the results that would be obtained if all qualified adults were interviewed in the same way. For more information, please go to www.neobarometer.org.

The data is often presented by Metropolitan Statistical Area (MSA). Northeast Ohio is comprised of four MSAs. They are defined as follows:

- Akron MSA: Portage and Summit Counties
- Canton MSA: Carroll and Stark Counties
- Cleveland MSA: Cuyahoga, Geauga, Lake, Lorain, and Medina Counties
- Youngstown MSA: Trumbull and Mahoning Counties

Ashland, Ashtabula, Columbiana and Wayne Counties do not belong in any MSA.

This year's data is compared to the NEO Barometer findings from two past years:

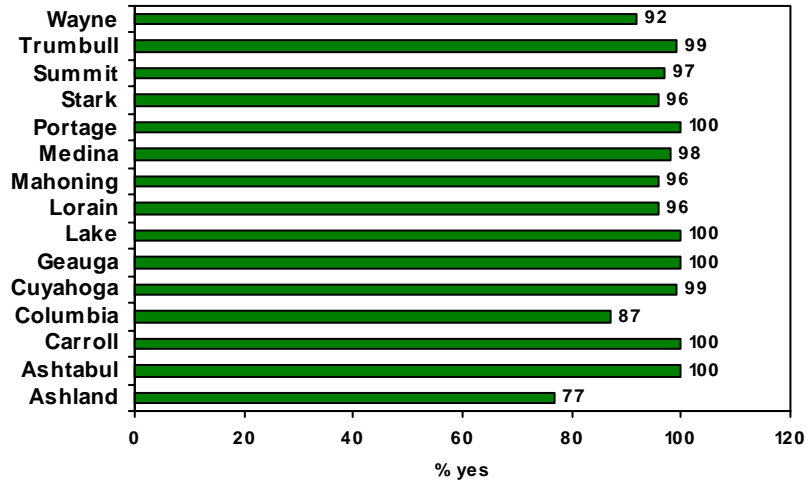
- Second Annual NEO Barometer: 2,205 interviews conducted in January 2005 in the same 15 counties
- First Annual NEO Barometer: 2,015 interviews conducted in December 2003. It included eight counties (Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, Stark and Summit) instead of the fifteen in the 2005 and 2006 expanded surveys.

This year's data is also compared to a Gallup survey of 2,307 residents of 21 U.S. cities conducted in June 2005 as a part of Gallup's Soul of the City program.

REGIONAL IDENTITY

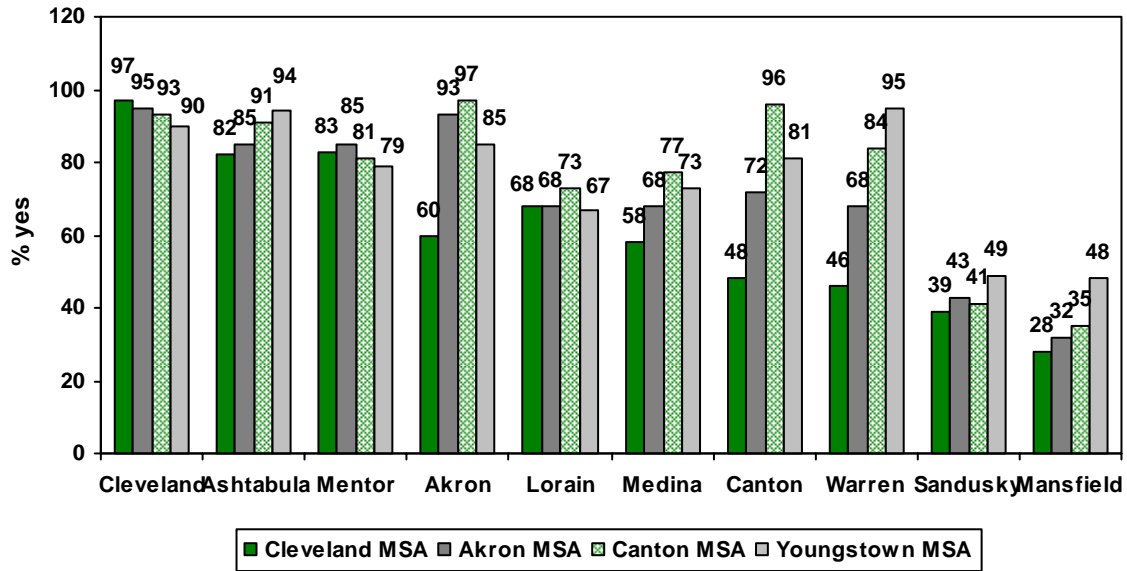
Residents of Northeast Ohio clearly think of themselves as belonging to this region. Ninety-seven (97) percent consider their county to be a part of Northeast Ohio. The lowest percentage of residents considering themselves part of the region was in Ashland (77 percent) followed by Columbiana (87 percent) and Wayne (92 percent).

Chart 1. Do you think of your county as being part of Northeast Ohio?



Residents were then presented with a list of cities and were asked if they considered each of them to be part of Northeast Ohio. At least 60 percent of residents identified all of the cities in the 15-county region as belonging to the region. Cleveland (94 percent), Ashtabula (85 percent) and Mentor (83 percent) received the highest level of consensus that they are part of the region. Similarly residents noted that Sandusky and Mansfield, areas not traditionally included in the 15-county region, do not belong to Northeast Ohio. Yet, residents of the Youngstown Metropolitan Statistical Area (MSA) identified the Sandusky (49 percent) and Mansfield (48 percent) areas as being part of the region with similar frequency as Cleveland area residents responded that Canton (48 percent) and Warren (46 percent) belonged to Northeast Ohio. The chart below shows the variation in responses by MSA.

Chart 2. Percent saying the below cities are part of Northeast Ohio



LOYALTY

Residents were asked a series of questions that can roughly be thought of as indications of loyalty. First they were asked to indicate how they feel about Northeast Ohio as a place to live today, 5 being the best possible area they could imagine and 1 being the worst. Twenty-three (23) percent of overall respondents felt Northeast Ohio was the best possible place to live. Only 5 percent said it was the worst. There was very little variation across counties though Ashland (35 percent saying best), Lake (32 percent) and Geauga (29 percent) were significantly more positive. Retired people were one of the most pleased groups (40 percent saying Northeast Ohio is the best place to live).

Estimations of the region decreased as both income and educational levels increased. While 37 percent of those with less than a high school education feel Northeast Ohio is the best place to live, only 16 percent of college graduates feel the same. Likewise, those earning less than \$25,000 annually rated the region much higher than those earning \$75,000 annually (32 versus 16 percent).

Chart 3a. How is Northeast Ohio as a Place to Live? By Area of Residence

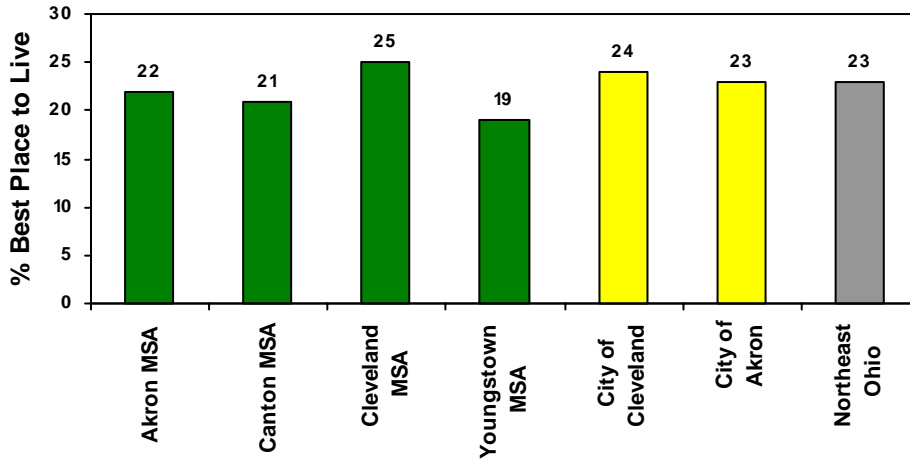


Chart 3b. How is Northeast Ohio as a Place to Live? By County

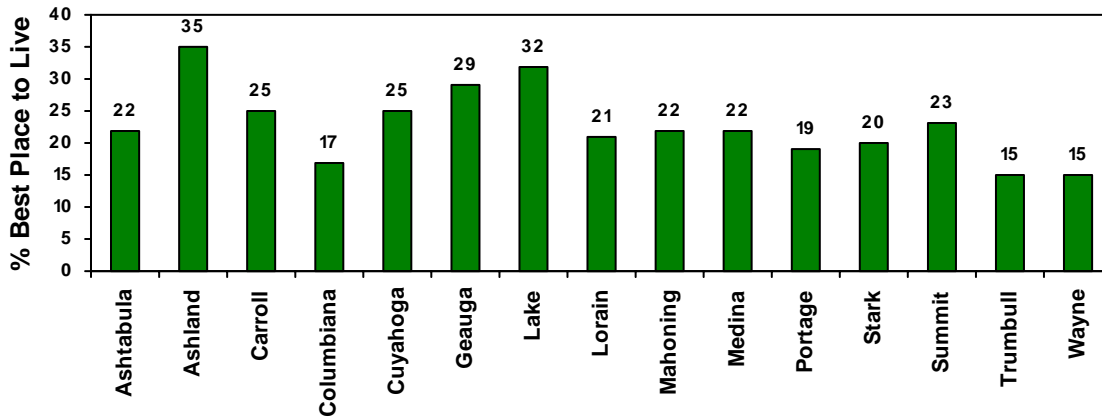
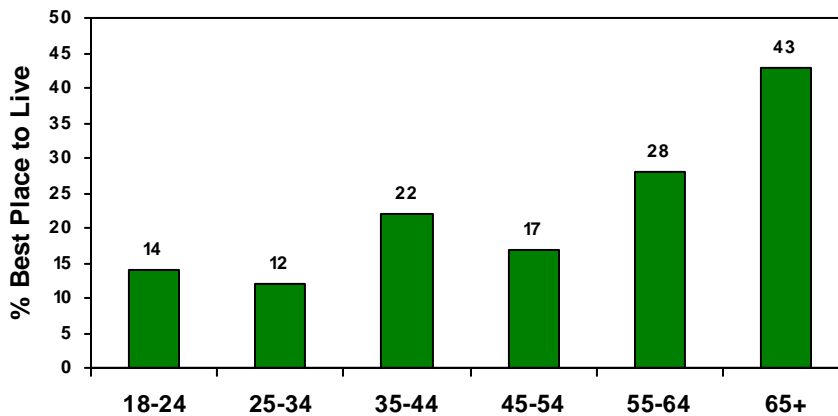


Chart 3c. How is Northeast Ohio as a Place to Live? By Age



Residents were then asked what number (1 to 5) they would choose to indicate where they think Northeast Ohio will be in five years from now as a place to live. Only 20 percent rated the region as the best and nine percent as the worst. Geauga, however, was

markedly more optimistic with 32 percent saying it would be the best place to live in five years. Conversely, Lake residents had much lower future expectations for the region, dropping from 32 percent “best” today to 21 percent “best” in five years.

Chart 4a. Percent Saying Northeast Ohio will be the Best Place to Live in 5 Years. By Area of Residence

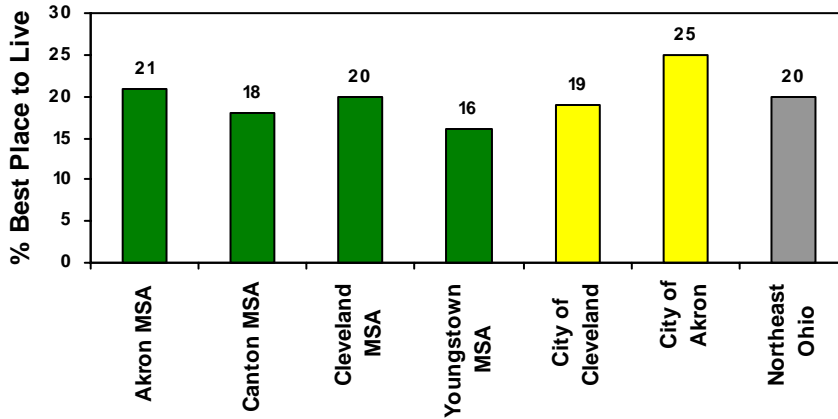


Chart 4b. Percent Saying Northeast Ohio will be the Best Place to Live in 5 Years. By County

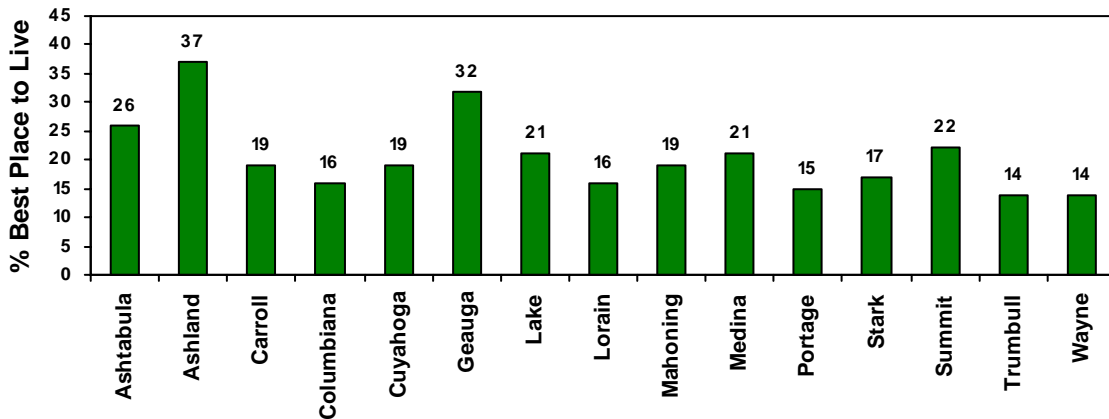
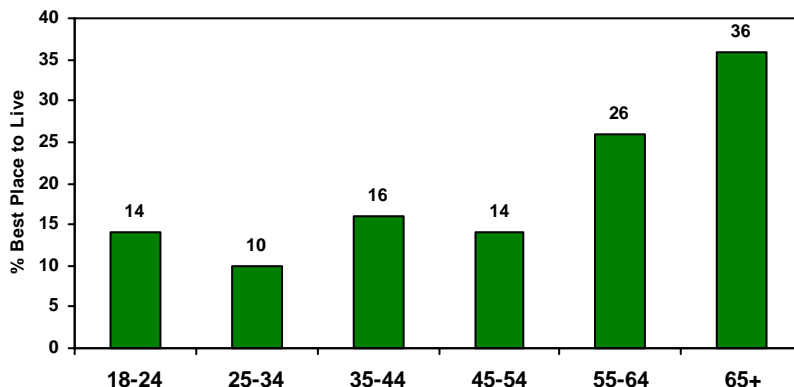


Chart 4c. Percent Saying Northeast Ohio will be the Best Place to Live in 5 Years. By Age



Northeast Ohioans express similar levels of satisfaction with the region as polls of city residents show across the nation. Overall, 24 percent of Northeast Ohioans are extremely satisfied compared to 26 percent of residents of 21 U.S. cities. Ashland (37 percent extremely satisfied) and Geauga (36 percent) expressed the highest levels of satisfaction. Carroll and Columbiana (both 13 percent) had the lowest satisfaction levels. As with the question on how the region is as a place to live, satisfaction increases with age.

Chart 5a. Percent Extremely Satisfied with Northeast Ohio as a Place to Live. By Area

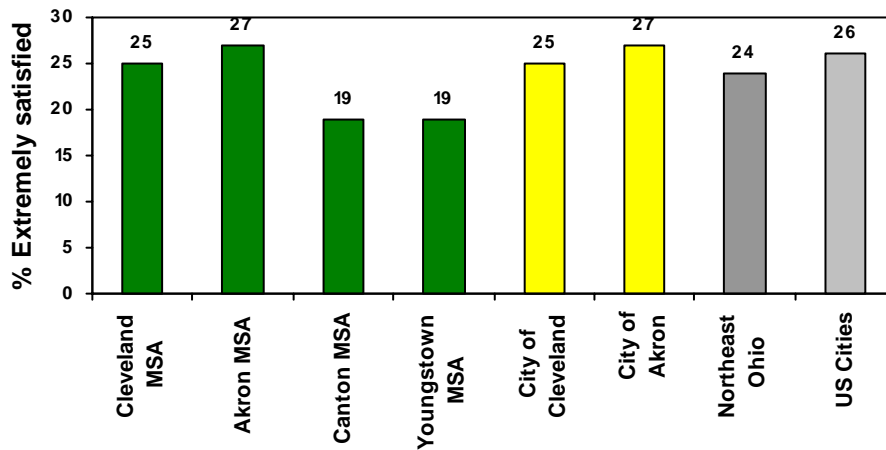


Chart 5b. Extremely Satisfied with Northeast Ohio as a Place to Live. By County

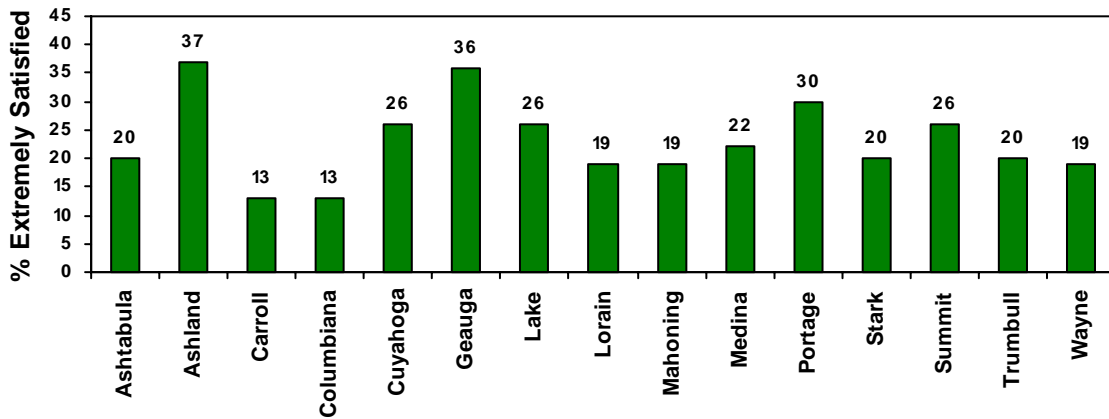
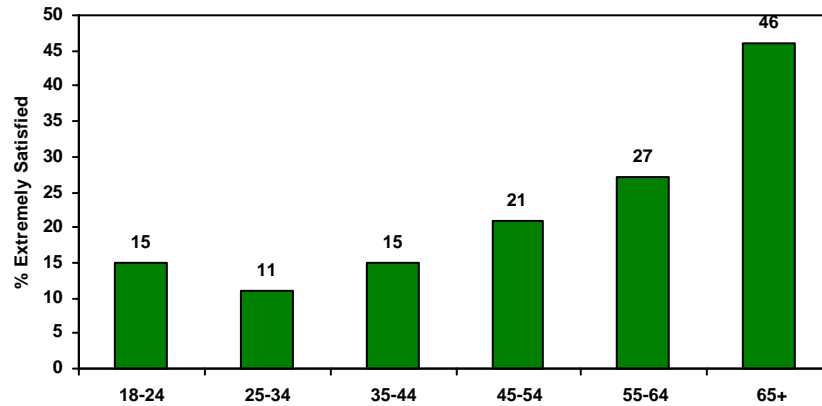
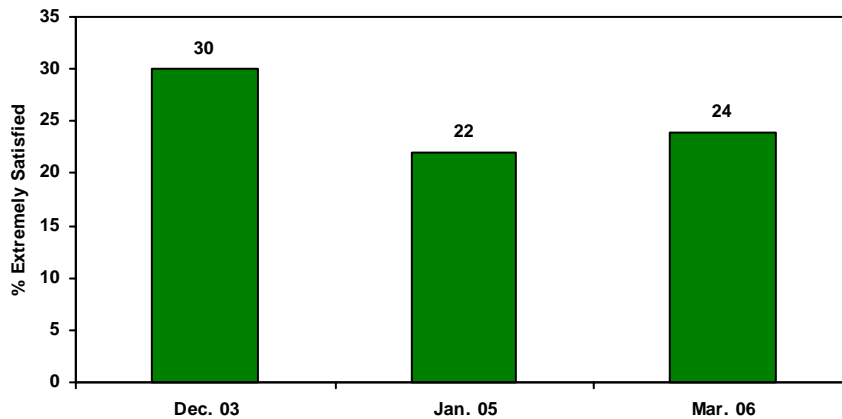


Chart 5c. Extremely Satisfied with Northeast Ohio as a Place to Live. By Age



Satisfaction levels remain stable from last year's survey (22 percent) but are significantly lower than the December 2003 survey (30 percent). The December 2003 survey did not include Ashland, Ashtabula, Carroll, Columbiana, Mahoning, Trumbull or Wayne counties which may account for some of the drop in satisfaction in the later surveys.

Chart 5d. Satisfaction over the Past Three Years



Fifty-four percent of NEO residents said they were likely to stay (this has remained basically unchanged over the past three years). Carroll residents were the most likely to believe they would continue living there (69 percent) and Ashtabula residents were the least likely (44 percent). Residents in the urban cities of Cleveland (49 percent) and Akron (51 percent) were slightly less likely to say they would continue to live here than the residents in their MSA as a whole. The ratings of urban residents, however, are comparable to residents from 21 different U.S. cities polled by Gallup in June 2005 (49 percent extremely likely to stay).

There were significant differences by race. Whites were the most likely to feel they were extremely likely to stay (57 percent) compared to only 42 percent of blacks and 39 percent of Hispanics. Not surprisingly, likelihood to stay also increased with age.

Chart 6a. Percent Extremely Likely to Continue Living in Northeast Ohio. By Area of Residence

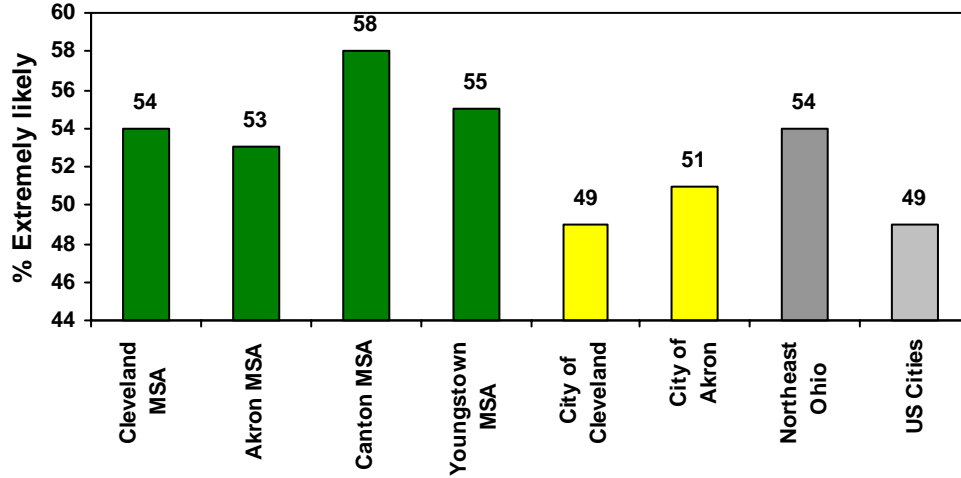


Chart 6b. Percent Extremely Likely to Continue Living in Northeast Ohio. By County

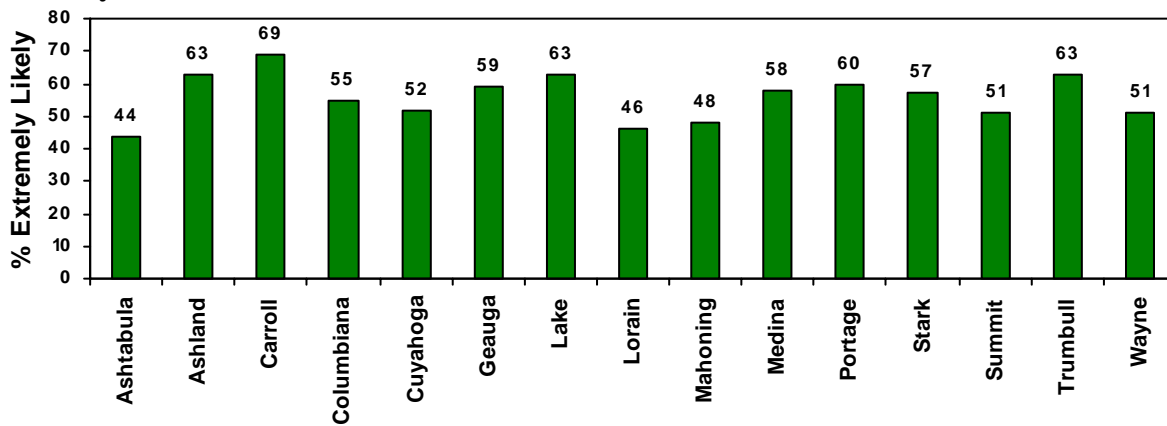
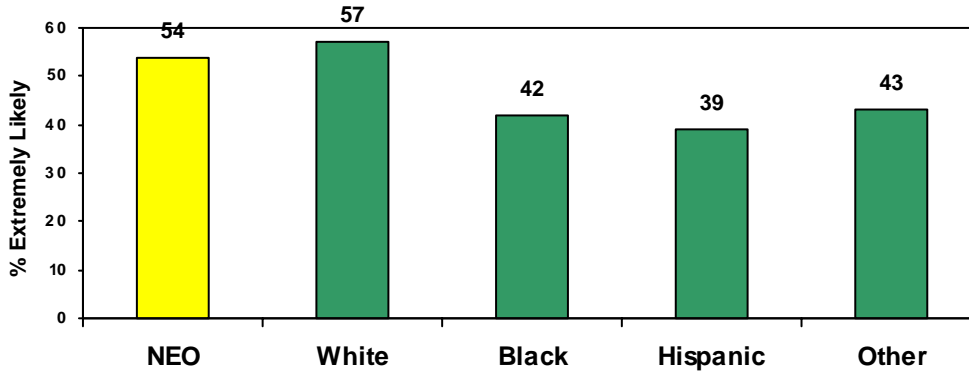


Chart 6c. Percent Extremely Likely to Continue Living in Northeast Ohio. By Race



Only 24 percent of residents are extremely likely to recommend Northeast Ohio as place to live and 17 percent are not at all likely. The cities of Cleveland and Akron feel similarly. In comparison, 35 percent of residents from 21 different U.S. cities polled by Gallup in June 2005 would recommend their city to a friend or associate. Ashland (37 percent), Lake (35 percent) and Geauga (34 percent) were much more likely to recommend the region than others. Columbiana (8 percent) and Trumbull (14 percent) were the least likely to recommend it.

Chart 7a. Percent Extremely Likely to Recommend the Region to a Friend. By Area of Residence

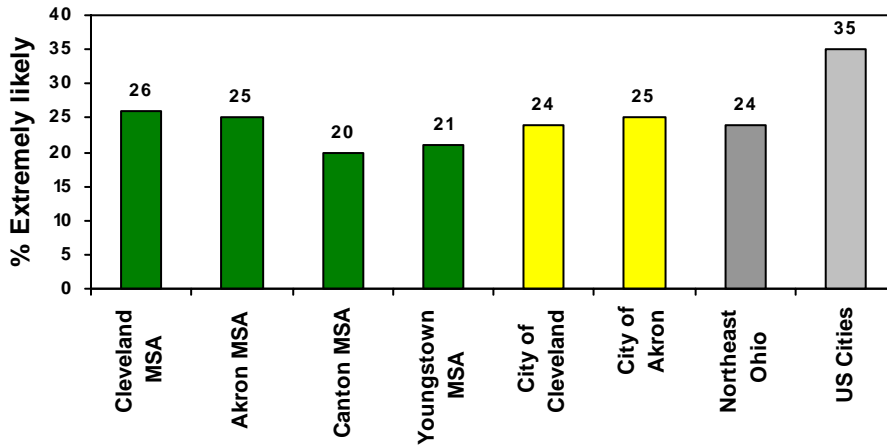
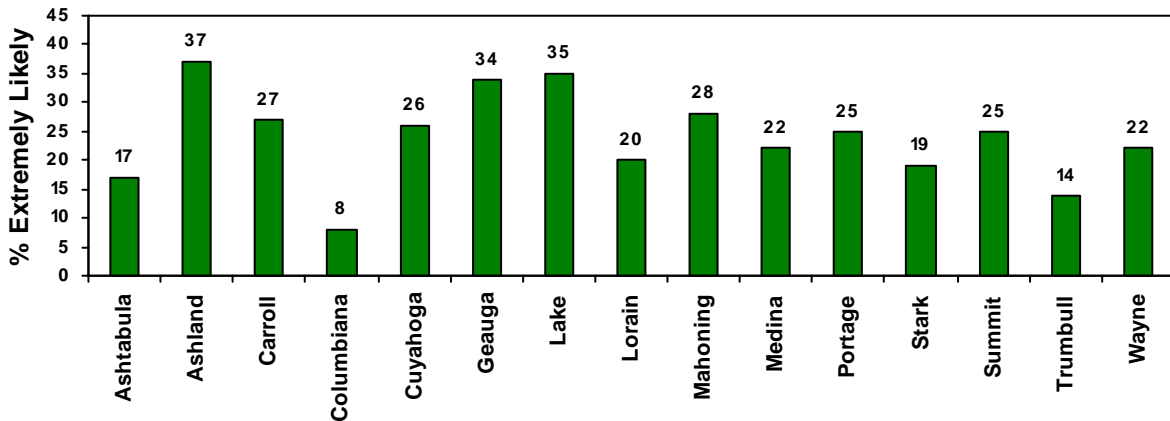
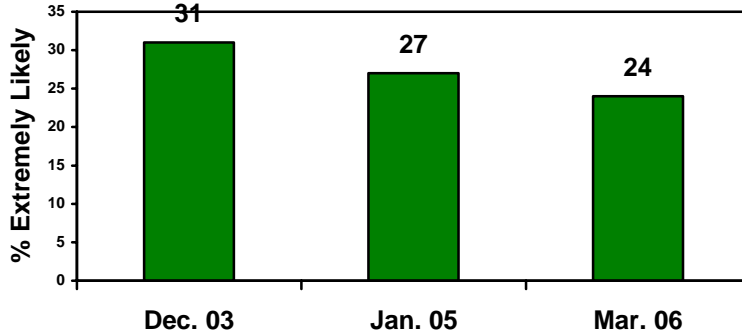


Chart 7b. Percent Extremely Likely to Recommend the Region to a Friend. By County



Northeast Ohioans have become less likely to recommend the region over the past three years. In December 2003, 31 percent were extremely likely to recommend and by January 2005, it was down to 27 percent.

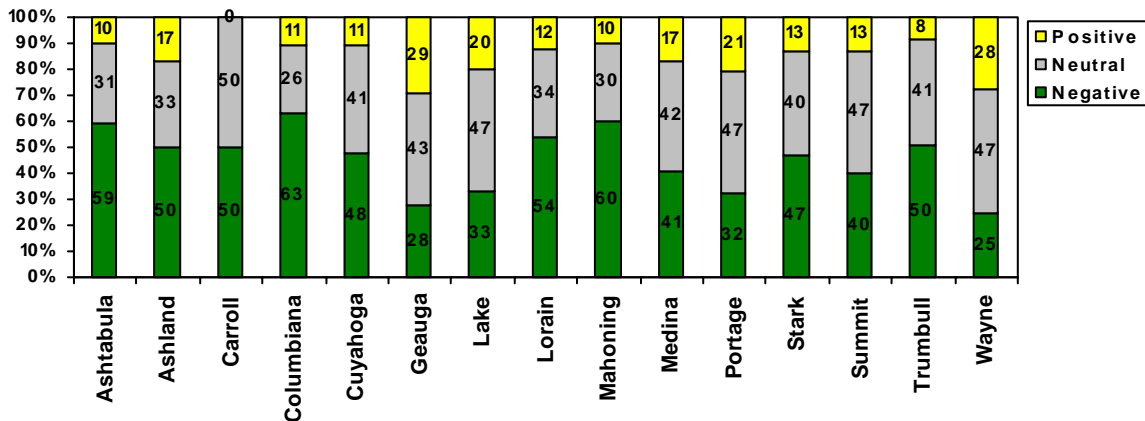
Chart 7c. Likelihood to Recommend over the Past Three Years



ECONOMIC CONDITIONS

Northeast Ohioans remain quite gloomy about the economic conditions in the region. Only 13 percent gave a positive rating to the economy (very good plus good) while 46 percent gave a negative rating (bad plus very bad). Forty (40) percent were neutral. Columbiana (63 percent negative ratings) and Mahoning (60 percent) were the gloomiest while Wayne (25 percent negative ratings) and Geauga (28 percent) were the least negative about the economy.

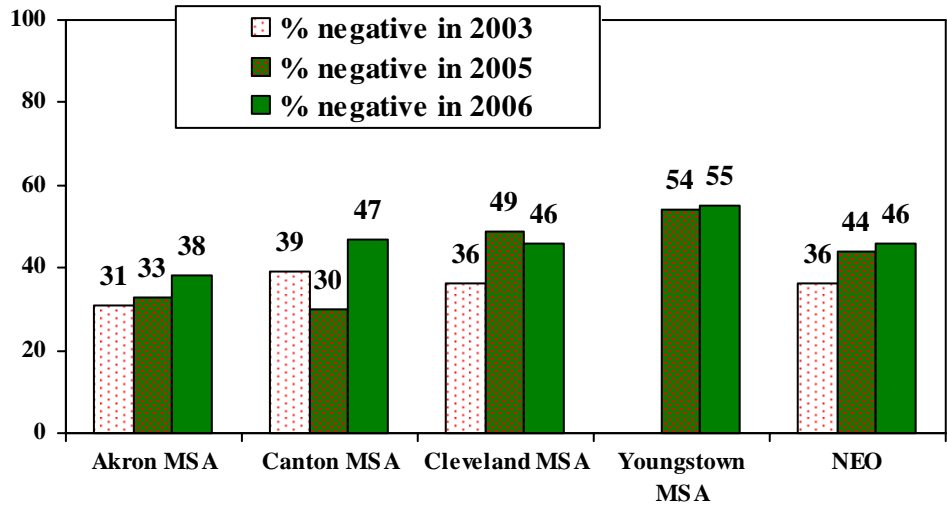
Chart 8a. Economic Attitudes Today. By County



Attitudes about the regional economy have remained more or less stable over the past two years although they have become significantly more negative in the Canton MSA from last year (30 percent negative) to this year (47 percent). Across the board, attitudes are significantly more negative than three years ago. The December 2003 survey did not

include Mahoning, Trumbull, Ashtabula, Columbiana, Wayne, Ashland or Carroll counties. Adding these counties in the latter two surveys may explain some of the increase in negativity.

Chart 8b. View of Economic Conditions in Region Over Past Three Years. By Area of Residence



The majority of residents (58 percent) believed the economy of Northeast Ohio is worse today than it was five years ago. Ashland (73 percent), Carroll (69 percent), Trumbull (69 percent) and Lorain (68 percent) were the most likely to see today’s economy as worse. In Lake, only 43 percent felt it was worse than five year ago.

Chart 9a. Percent Feeling Economy is Worse than Five Years Ago. By Area of Residence

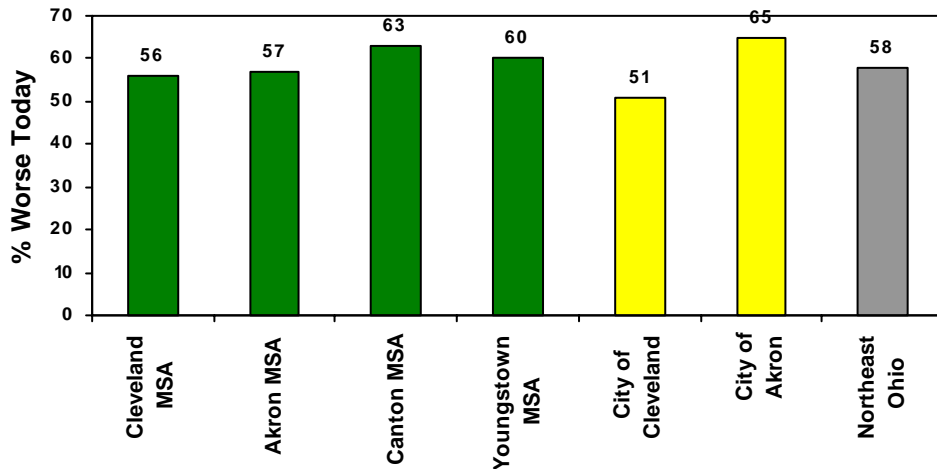
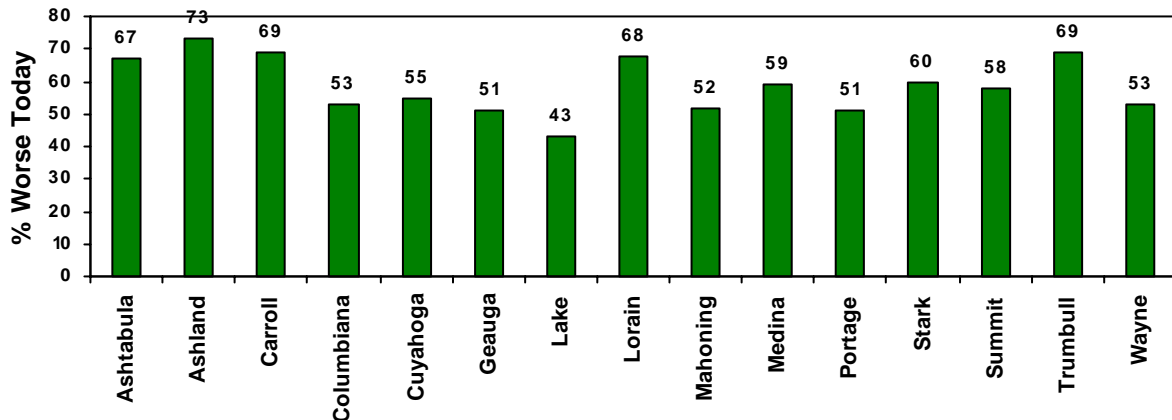


Chart 9b. Percent Feeling Economy is Worse than Five Years Ago. By County



Almost equal numbers of residents believe the economy will be better in five years (27 percent) as believe it will be worse (26 percent). The balance (48 percent) thinks it will be about the same. Geauga residents are more optimistic; only 16 percent feel the economy will be worse while 40 percent believe the economy will be better in five years. Though Cleveland, Akron and Canton area residents felt that the economy would become worse in five years (24 percent) in equal numbers, more Youngstown area respondents (33 percent) had a negative five year outlook.

Chart 10a. Percent Feeling Economy will be Worse in Five Years. By Area of Residence

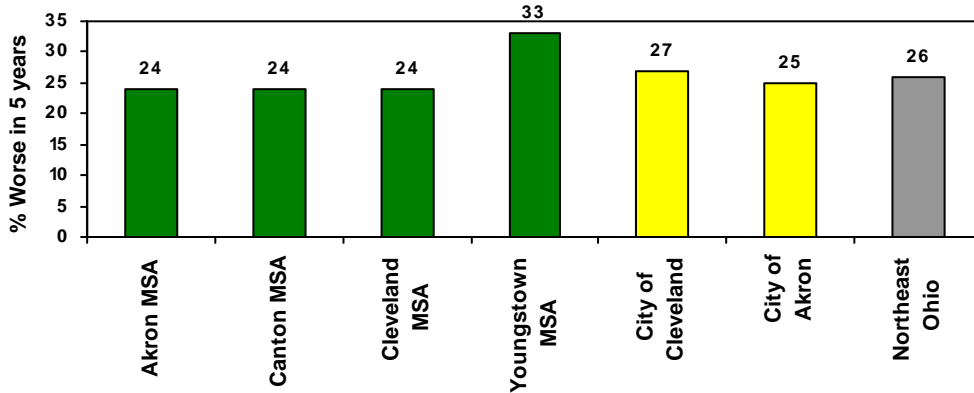
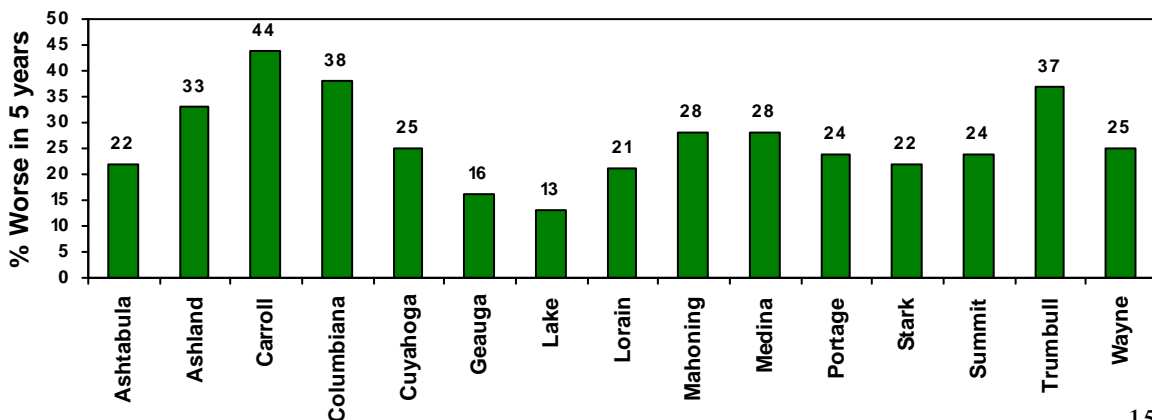
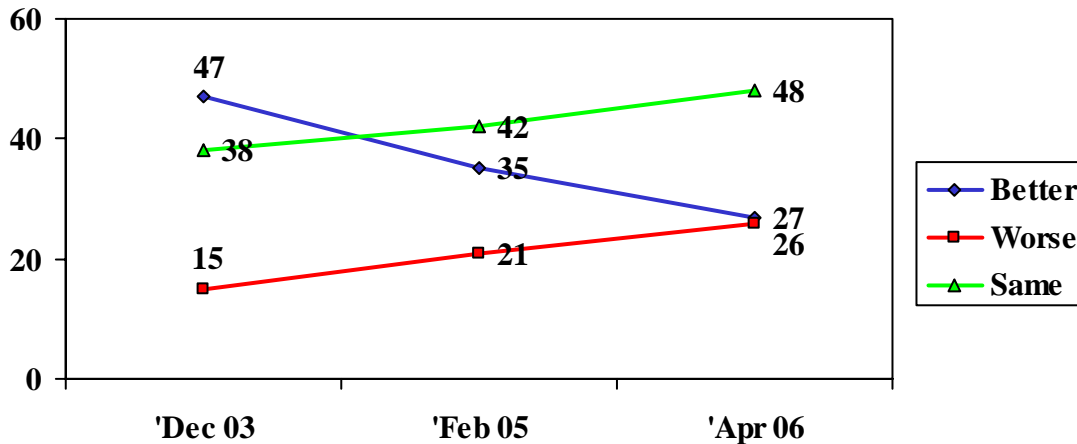


Chart 10b. Percent Feeling Economy will be Worse in Five Years. By County



The NEO Barometer findings over the past three years have seen a deterioration of public attitudes about the future of the region’s economy. In December 2003, 47 percent of residents thought the economy would be better in 5 years. That is down to 27 percent today. Similarly, only 15 percent thought it would be worse in late 2003 while today 26 percent believe it will be worse. The December 2003 survey did not include Mahoning, Trumbull, Ashtabula, Columbiana, Wayne, Ashland or Carroll counties. Adding these counties in the latter two surveys may explain some of the increased negativity.

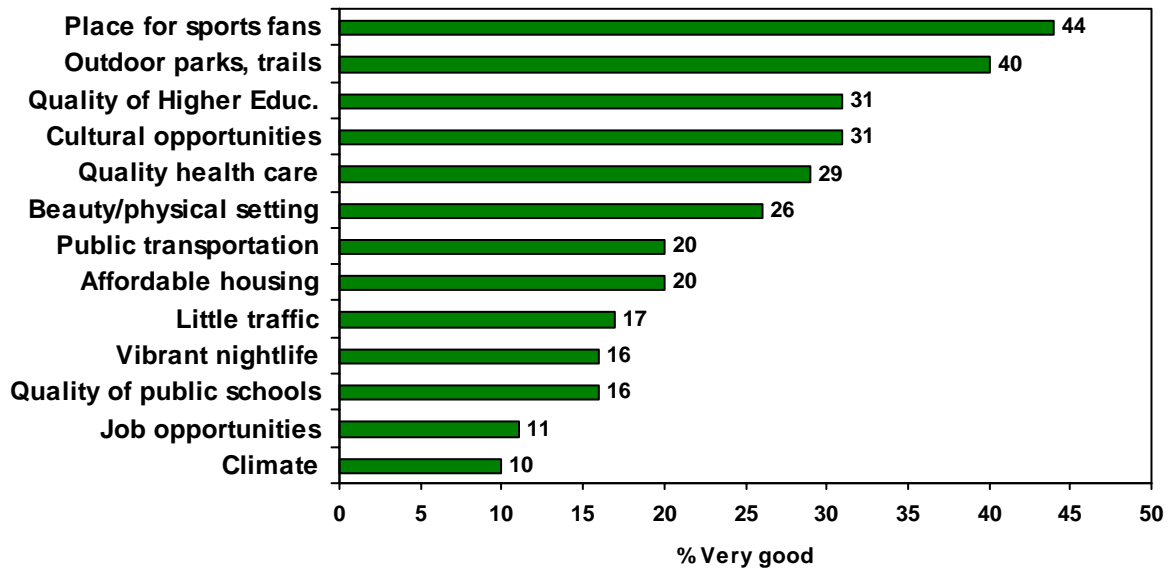
Chart 11. Views of the Future Regional Economy over the Past Three Years



REGIONAL ASSETS

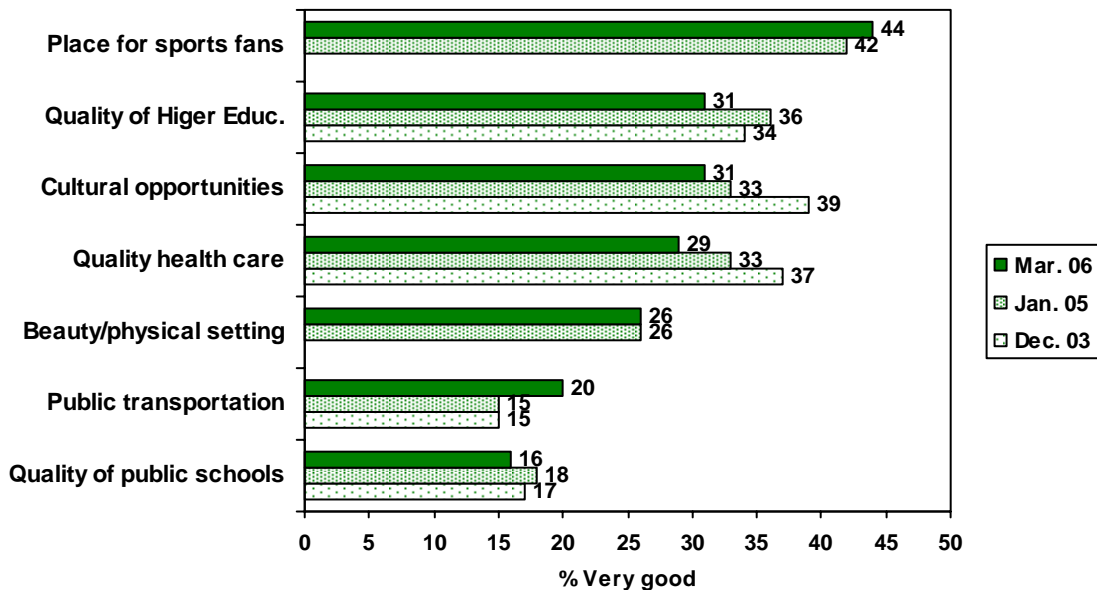
Northeast Ohioans give high ratings to many of the region’s assets. The benefits for sports fans (44 percent rate it as very good) and the availability of outdoor parks, playgrounds and trails (40 percent very good) rate the highest. The quality of colleges and universities (31 percent), the availability of cultural opportunities such as theater, museums, and music (31 percent) and the availability of quality health care (29 percent) are also rated quite high. On the downside, the climate (10 percent), job opportunities (11 percent), the quality of public schools (16 percent) and vibrant nightlife (16 percent) are rarely given the highest rating of “very good.”

Chart 12a. Rating of Aspects of Life in Northeast Ohio



The NEO Barometer has tracked several of these aspects of life over the past three years. There are few significant changes over time although the perception of the availability of quality health care and cultural opportunities has fallen from December 2003 to March 2006.¹

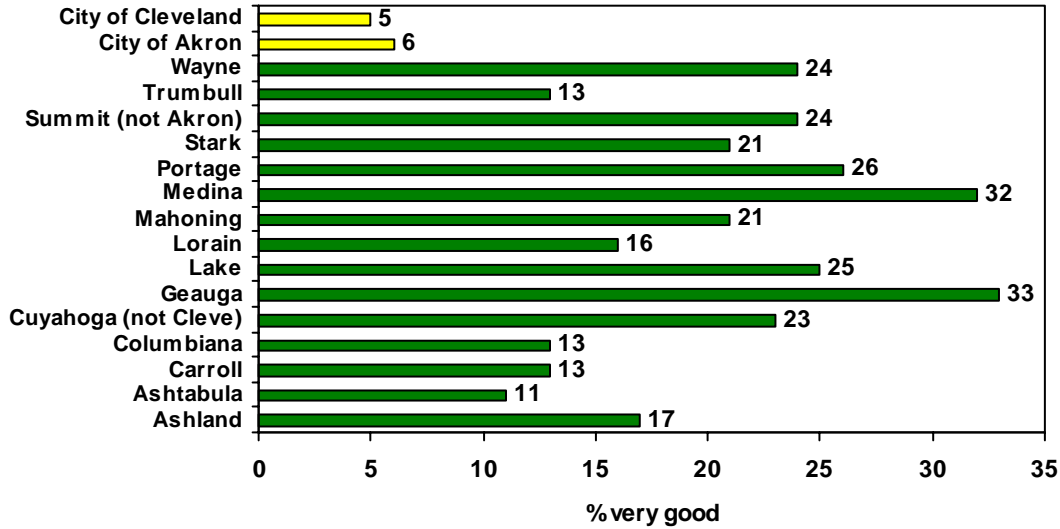
Chart 12b. Rating of Aspects of Life in Northeast Ohio over Past Three Years



¹ The addition of six additional counties to the 2005 and 2006 surveys may explain some of the variation from the 2003 survey results.

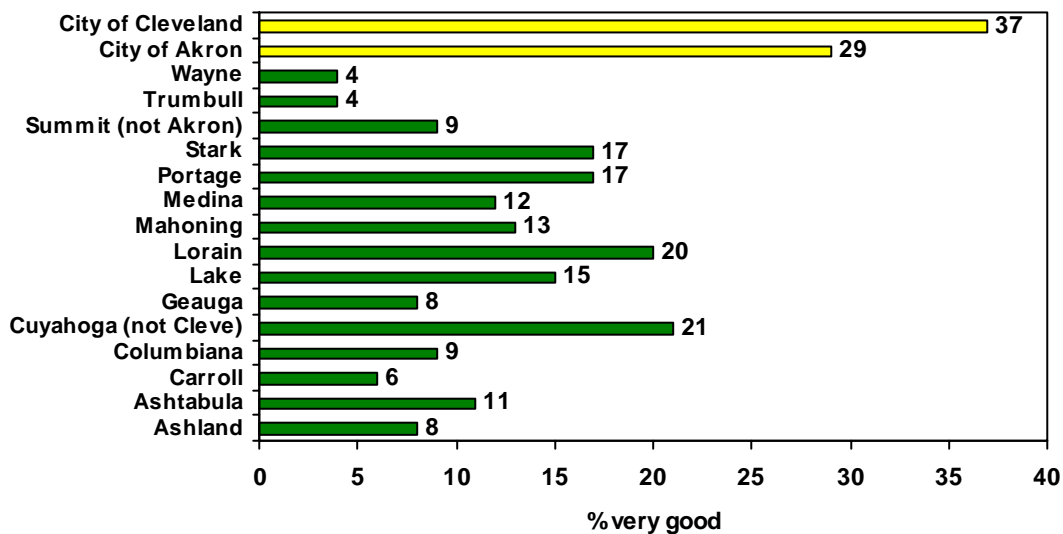
Some of these categories show great range of ratings by geography. For example, the quality of public schools rated 5 percent very good in the City of Cleveland and 33 percent very good in Geauga.

Chart 13. Quality of Public Schools by Area of Residence



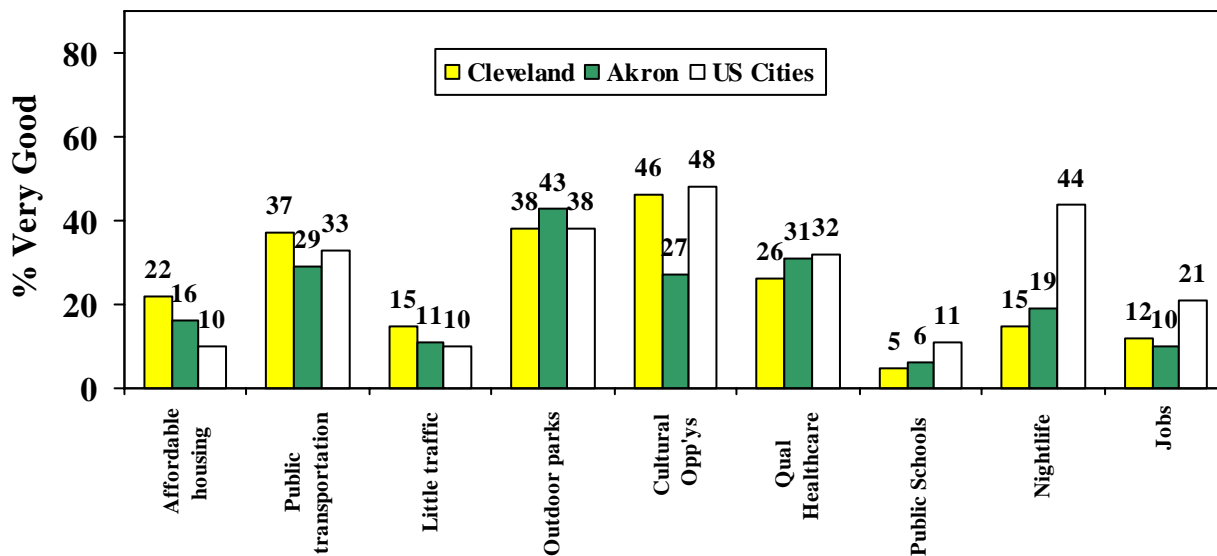
The availability of public transportation also varies greatly by geography. Thirty-seven percent of Clevelanders feel availability is very good while only 4 percent of Trumbull and Wayne residents feel the same. All of the counties have some form of regional transportation system although they vary in size and scope. For example, Wayne County is only served by Wayne County Senior Transportation (WCST), explaining its low score on public transportation availability.

Chart 14. Availability of Public Transportation by Area of Residence



Northeast Ohio’s largest cities (Cleveland and Akron) rate several of their amenities higher than other cities across the nation.² Both Cleveland and Akron rate their traffic levels and the availability of affordable housing much more favorably than other U.S. cities. Cleveland rates its public transportation much higher than cities on average and Akron rates its parks and green spaces higher than other cities. Their ratings of the availability of quality health care and cultural opportunities are comparable. Only the quality of public schools, nightlife, and job opportunities in these cities fell far short of the national findings.

Chart 15. Cleveland and Akron Assets compared to Other U.S. Cities



Given Northeast Ohio’s assets and the areas in which it needs some improvement, the majority of residents do not feel the region offers the advantages and opportunities that will keep young people and the most talented people from leaving the area for other places. Only 29 percent of Northeast Ohioans believe the region can compete to retain this young and talented population. There is little variation by area or demographics except for the Youngstown MSA which is significantly less positive (14 percent) about retaining the young population. The region’s assessment of its ability to keep young and talented people from leaving has significantly decreased from 39 percent in December 2003 and 43 percent in January 2005.³

² Gallup surveyed 2,307 residents of 21 U.S. cities from May-June 2005. This data is only for cities proper so should not be used as a comparison point for the Northeast Ohio region as a whole. The NEO Barometer does not have sufficient data to compare every city in the region, only the two largest.

³ The addition of six additional counties to the 2005 and 2006 surveys may explain some of the variation from the 2003 survey results.

Chart 16a. Percent that feel Northeast Ohio Offers the Advantages/Opportunities for Young & Talented to Stay. By Area of Residence

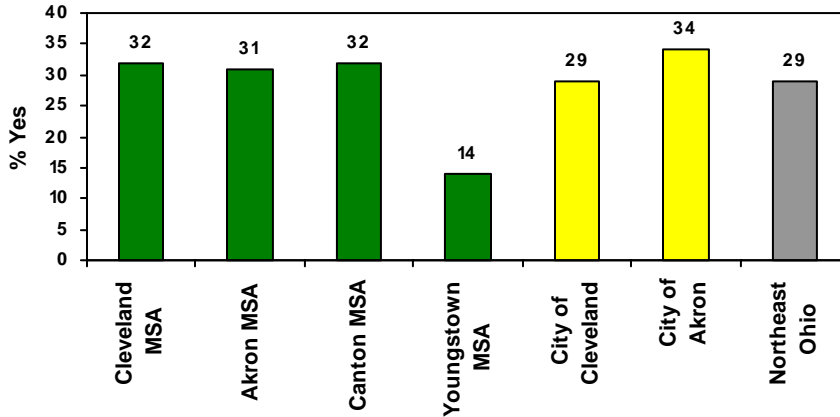
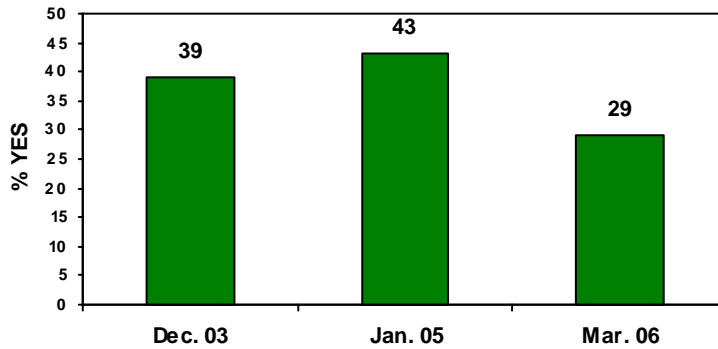
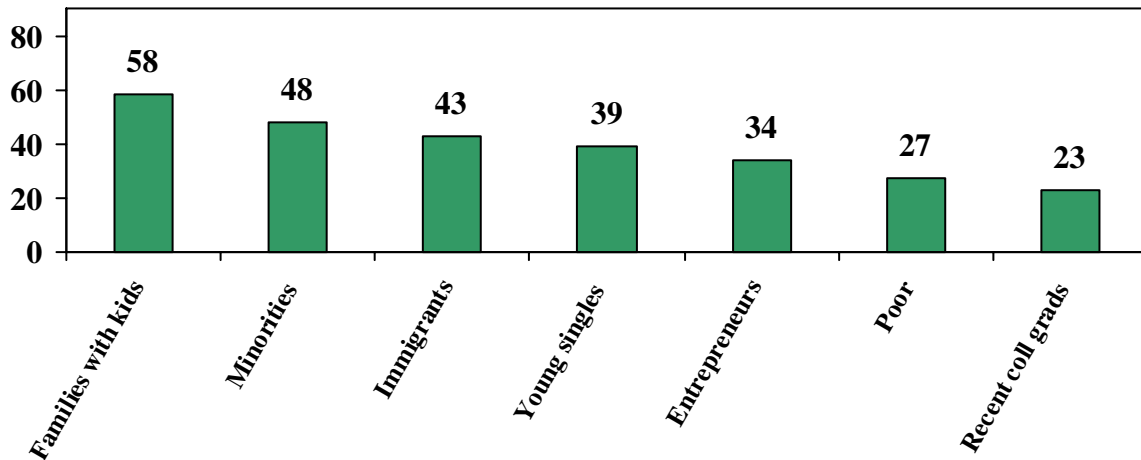


Chart 16b. Assessment of Ability to Retain Young/Talented over Past 3 Years



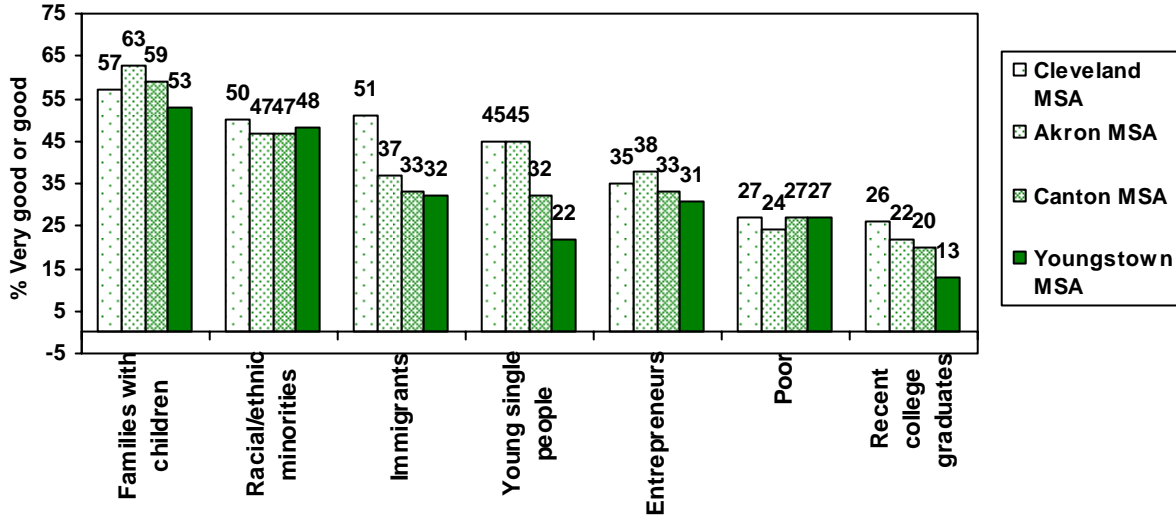
The majority of Northeast Ohioans (58 percent) believe the region is good or very good place to live for families with children. They are slightly less positive about how it is for minorities (48 percent good or very good) and immigrants (43 percent) but are more negative about the life the region can offer young singles (39 percent positive), entrepreneurs (34 percent), the poor (27 percent) and recent college graduates looking to enter the job market (23 percent).

Chart 17a. Ratings of Northeast Ohio as a Place to Live For...



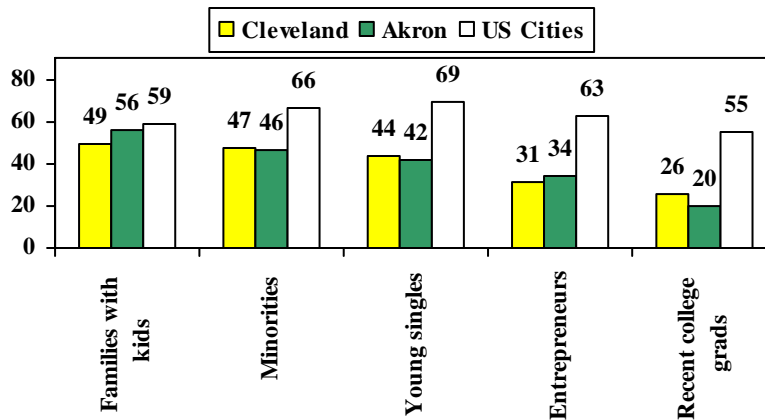
There are some large differences in these ratings by MSA. For example, 51 percent of the Cleveland MSA felt the region was good or very good for immigrants while only 32 percent of the Youngstown MSA felt that way. Similarly 45 percent of the Cleveland and Akron MSAs felt the region was good or very good for young single people while only 22 percent of the Youngstown and 32 percent of the Canton MSA agreed.

**Chart 17b. Ratings of Northeast Ohio As a Place to Live For...
By Area of Residence**



Cleveland and Akron do not compare favorably to the ratings of other cities in the United States. They are significantly lower on four of the five categories of people available for comparison: minorities, young singles, entrepreneurs and recent college graduates. Akron is on par with other cities for providing a good place to live to families with children. Cleveland falls short in this category as well.

Chart 17c. Cleveland City and Akron City Ratings compared to Other U.S. Cities



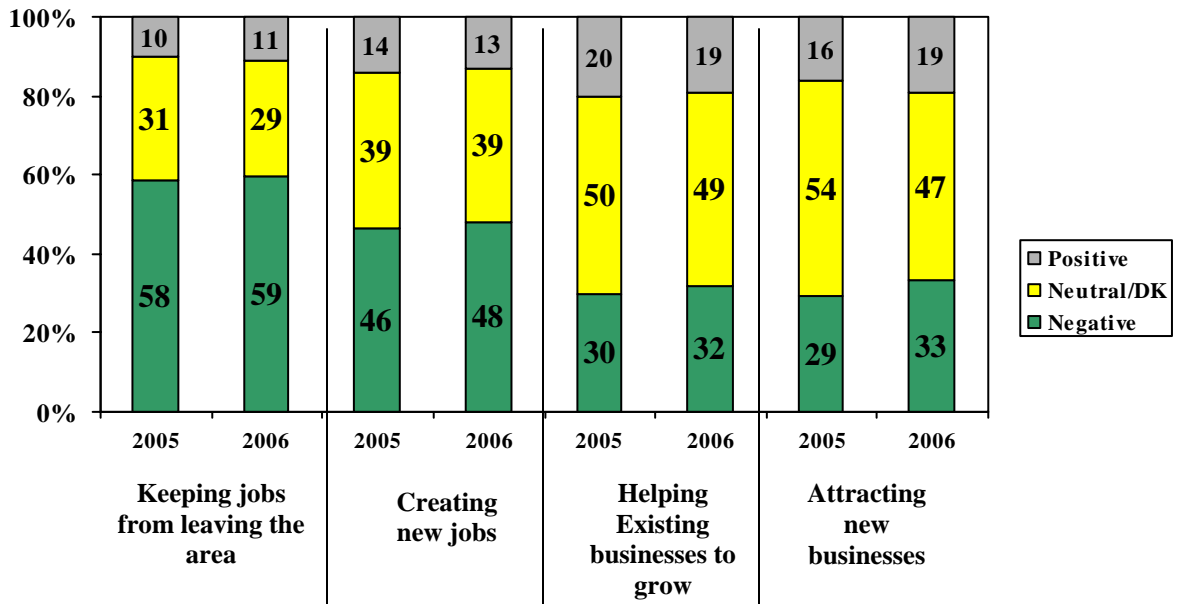
ECONOMIC DEVELOPMENT EFFORTS

Northeast Ohioans were asked to rate how the region was doing in four areas:

1. Attracting new businesses or companies to move here
2. Helping existing businesses to grow
3. Creating new jobs
4. Keeping jobs from leaving the area.

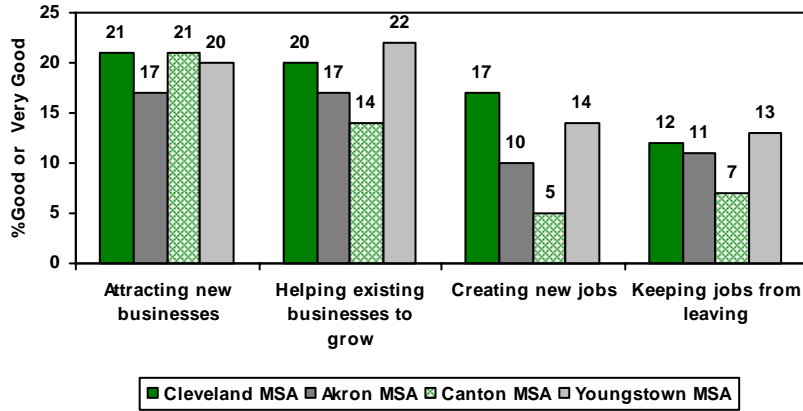
Residents of the region are the most negative (59 percent negative) about the region’s performance on keeping jobs from leaving the area. However, efforts to attract new businesses (33 percent negative) and helping existing businesses to grow (32 percent) are perceived in a less negative light. Positive responses are higher for those two areas. There has been very little change in opinion from the 2005 survey.

Chart 18a. How is Northeast Ohio doing at each of the following? 2005 vs. 2006



Opinions varied by area of residence. Residents of the Canton MSA were significantly less positive in all of the categories than those elsewhere in the region except for efforts to attract new businesses.

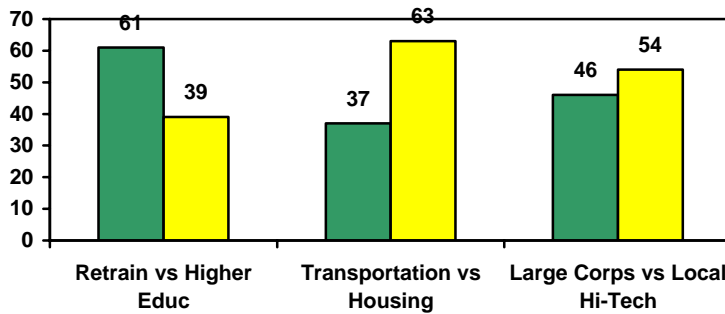
Chart 18b. How is Northeast Ohio doing at each of the following? By Area of Residence



When asked to choose between 3 sets of trade-offs for economic development strategies, Northeast Ohioans expressed very clear preferences. They were asked to decide which of two options would do more to improve the economy of Northeast Ohio in a series of choices:

1. Re-training today’s workers for new job opportunities (61 percent) or Encourage more to get college degrees for jobs (39 percent)
2. Improving access to public transportation so workers can get to where the jobs are (37 percent) or Improving affordable housing throughout the region so workers can live near where the jobs are (63 percent)
3. Attracting large corporations from other places (46 percent) or Supporting hi-tech business start-ups locally (54 percent)

Chart 19a. Which will improve the economy more?



There was high agreement across the region on all three trade-offs, although those in the Cleveland MSA were more supportive of higher education as a workforce strategy (41 percent for higher education) than those in the Youngstown MSA (34 percent). Canton MSA residents were a little more supportive of improving affordable housing (67 percent) over public transportation than the rest of the region. The trade-off on business growth strategies had the most variation in opinion. Akron MSA residents favored supporting local hi-tech businesses (60 percent) while those from the Youngstown MSA favored attracting large corporations from other places (56 percent).

While there was little variation by income levels, responses by educational levels had some significant differences. Those without a high school degree were more supportive of higher education as a workforce strategy (53 percent for higher education) than the rest. Forty percent of college graduates preferred this strategy. High school graduates and those without a high school degree were more supportive of improving affordable housing (68 and 63 percent, respectively) than those with a college degree (56 percent). College graduates were more supportive of supporting hi-tech business start-ups (61 percent) than the rest of the respondents.

Chart 19b. Which would do more to improve the economy in Northeast Ohio: Re-training Workers or Encouraging More People to Get a College Degree? By Area of Residence

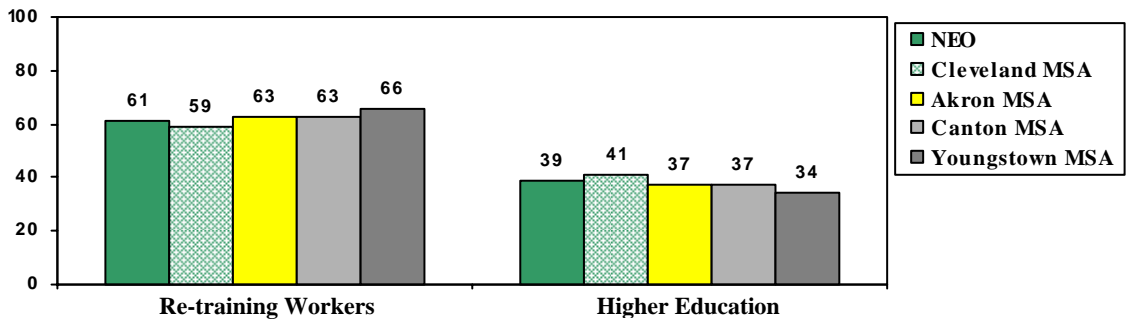


Chart 19c. Which would do more to improve the economy in Northeast Ohio: Improving Access to Public Transportation or Improving Affordable Housing throughout the Region? By Area of Residence

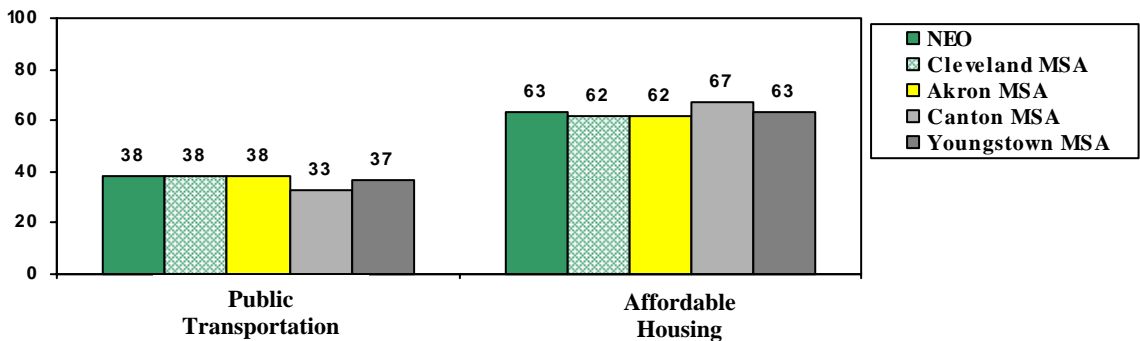
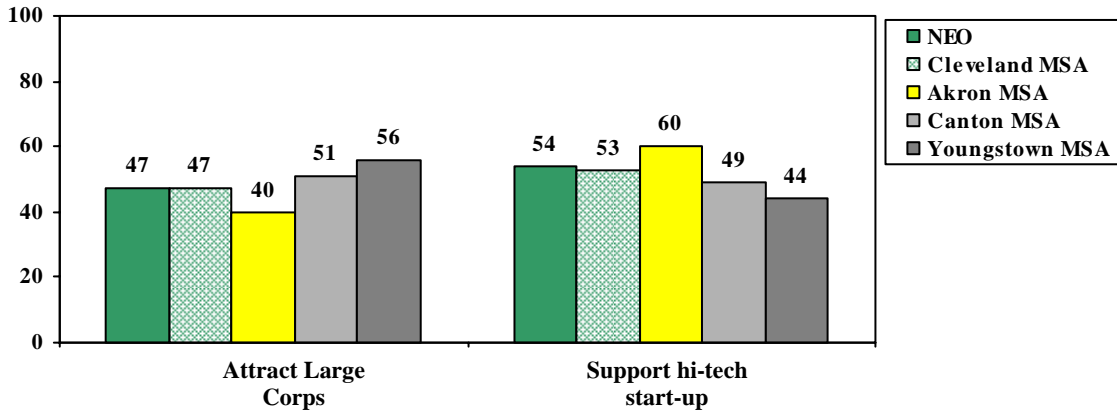


Chart 19d. Which would do more to improve the economy in Northeast Ohio: Attracting Large Corporations from Other Places or Supporting Hi-tech business start-ups locally? By Area of Residence



REGIONAL COOPERATION

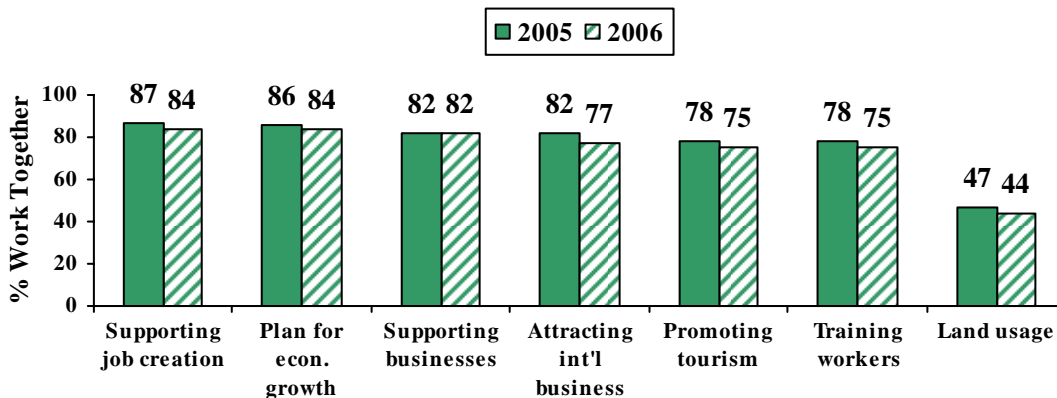
Northeast Ohioans consistently demonstrate a strong support for regional cooperation. Over the past two years, responses have been stable and overwhelmingly in support of counties working together on a series of issues:

- Supporting job creation (84 percent)
- Developing an overall plan for economic growth (84 percent)
- Supporting business (82 percent)
- Attracting international businesses (77 percent)
- Promoting tourism (75 percent)
- Training workers for new job opportunities (75 percent)

The only issue which residents don't tend to support multi-county collaboration is:

- Deciding whether land is used for housing, businesses, agriculture, or other purposes (44 percent).

Chart 20. Thinking about regionalism, should counties work together on this issue, or should each county work on its own?



REGIONAL CHOICES

Finally, residents were asked a series of questions about choices they would make as a region. Northeast Ohioans expressed strong support for a regional system of school funding. A clear majority, 56 percent, favored a system that would increase equity across public school districts even though it could be at the expense of wealthier school districts. The level of support also remained constant across all four MSAs. Thirty-three (33) percent opposed it and the balance (11 percent) was not sure. Depending on the area of residence in the region, opinions varied. Columbiana County and City of Cleveland expressed the most support (69 and 64 percent, respectively) and Carroll County the least (41 percent). While support for regional school funding to increase equity cuts across racial lines, it was strongest among African Americans (69 percent). Support also increased with education levels. Fifty percent of those without a high school degree are in favor compared to 61 percent of college graduates. Response by income levels showed little variation and no clear trend in support.

Chart 21a. Percent who Favor a Regional System of School Funding. By Area of Residence

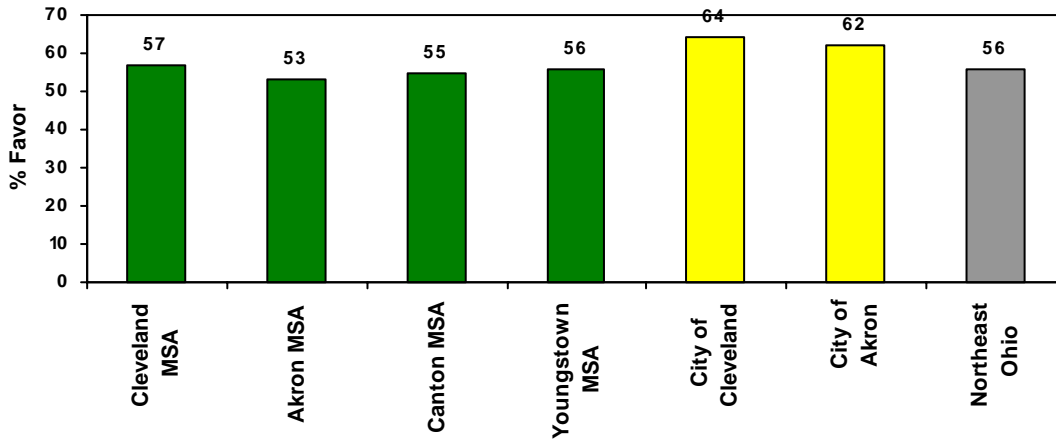


Chart 21b. Percent who Favor a Regional System of School Funding. By County

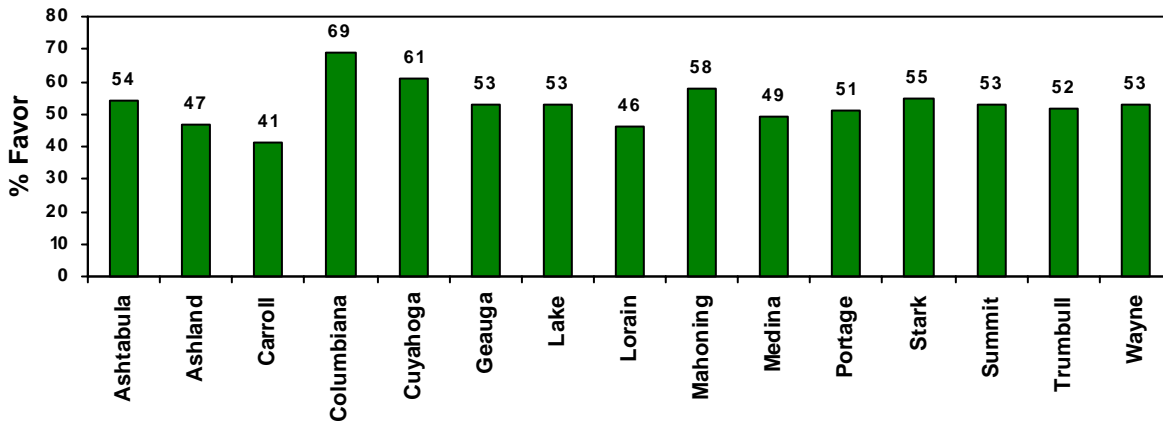
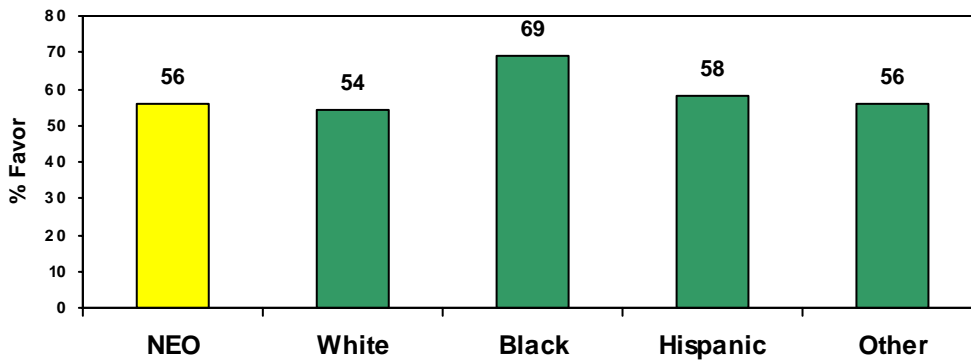


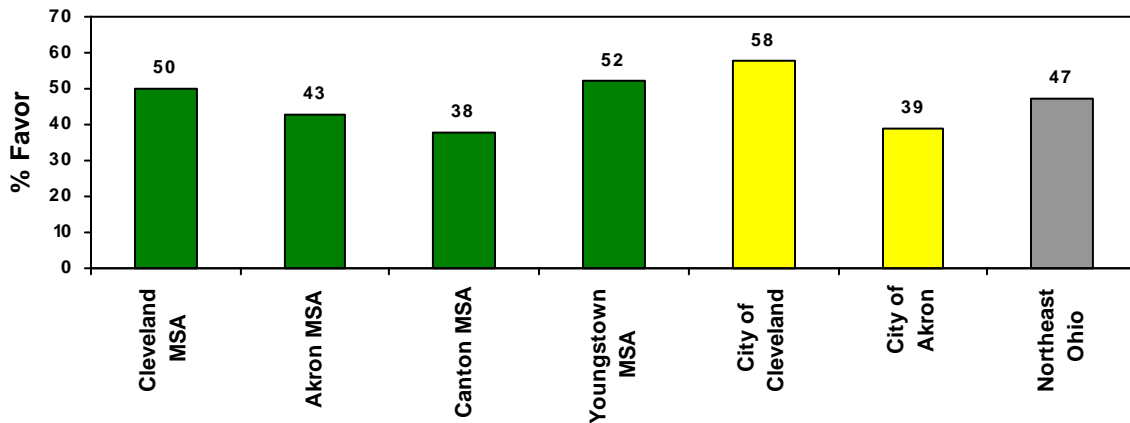
Chart 21c. Percent who Favor a Regional System of School Funding. By Race



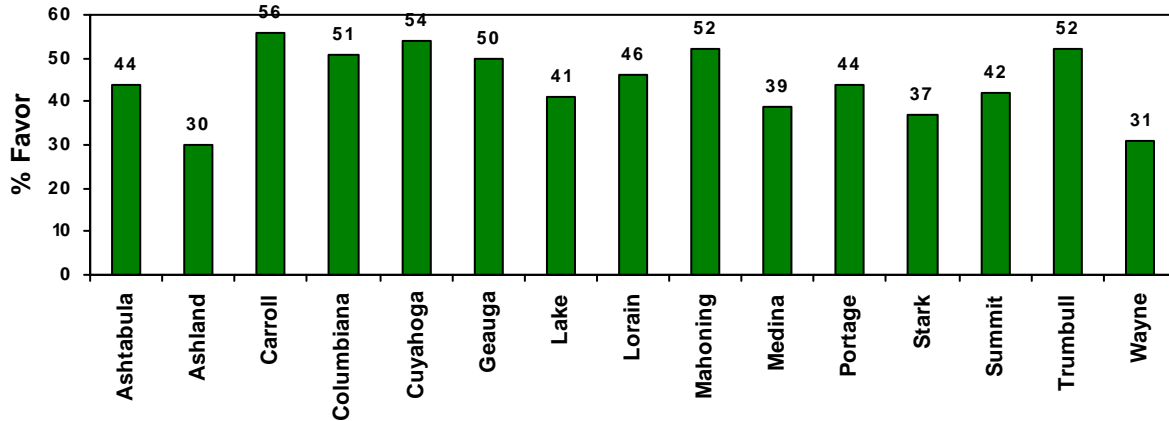
Northeast Ohioans had mixed opinions on whether fire and police services should be consolidated across jurisdictions to potentially save taxpayers money but at the expense of reduced local control. Forty-seven (47) percent were in favor, 46 percent opposed, and the balance (7 percent) was not sure. Depending on the area of residence in the region, opinions varied. Support was highest in the City of Cleveland (58 percent) and lowest in the counties of Ashland (30 percent) and Wayne (31 percent).

Curiously, men (54 percent favor) are more supportive of consolidation of emergency services than women (41 percent). Also, African Americans (54 percent) are more supportive of consolidation than whites (46 percent). Although there was little variation across most education and income levels, respondents without a high school degree were more supportive of consolidation (53 percent) than the rest as were those earning less than \$25,000 annually (56 percent).

Chart 22a. Percent who Favor Consolidation of Fire and Police Services. By Area of Residence



**Chart 22b. Percent who Favor Consolidation of Fire and Police Services.
By County**



In general, support is low throughout the region for merging municipal governments with county government to have just one governing entity. Thirty-five (35) percent thought it would help their local area, 56 percent thought it would hurt their local area and the balance (9 percent) was not sure. Depending on the area of residence in the region, opinions varied. Support was highest in the City of Cleveland (51 percent) and lowest in the counties of Carroll (17 percent) and Wayne (17 percent). Minorities, especially Hispanics (56 percent), show stronger support for municipal consolidation than do whites (33 percent). Responses by income showed little variation and no clear trends. Those without a high school degree are more supportive (41 percent in favor) than the others.

Chart 23a. Percent who Believe Municipal/County Government Consolidation Would Help. By Area of Residence

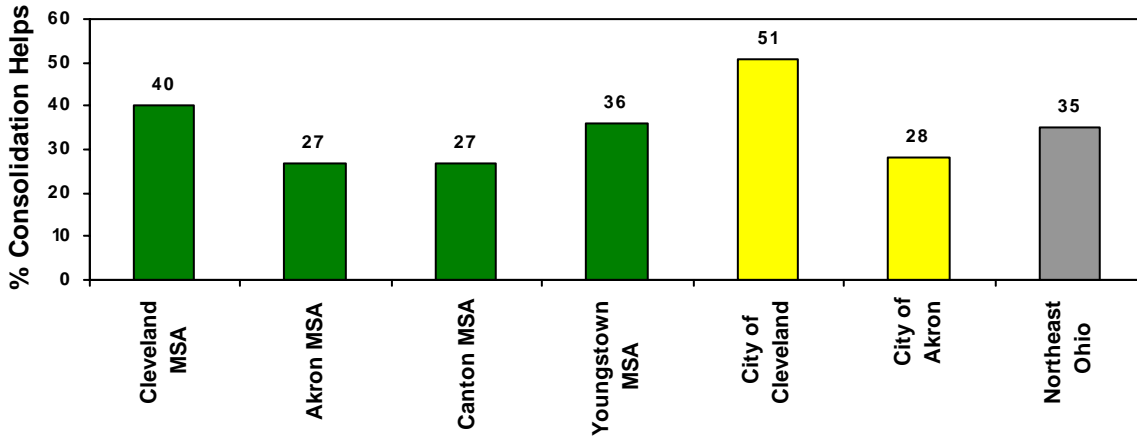


Chart 23b. Percent who Believe Municipal/County Government Consolidation Would Help. By County

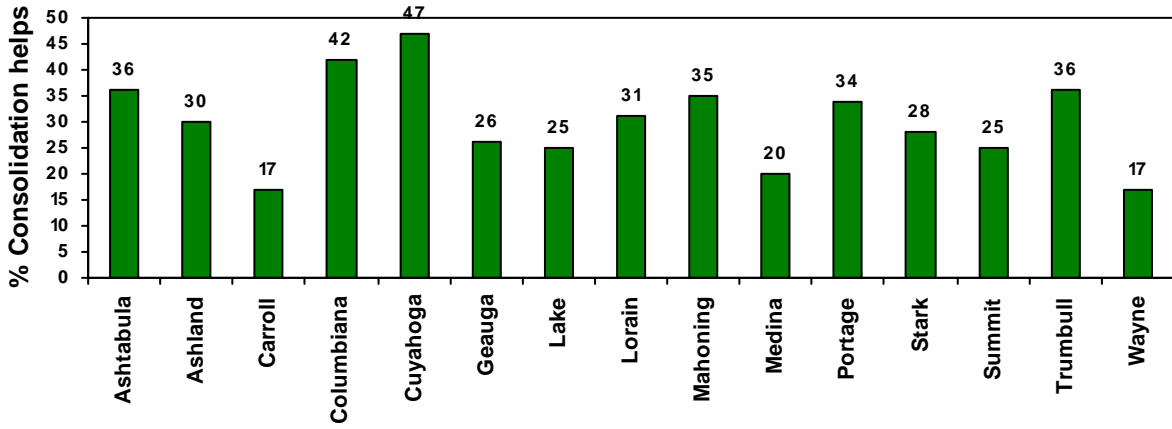
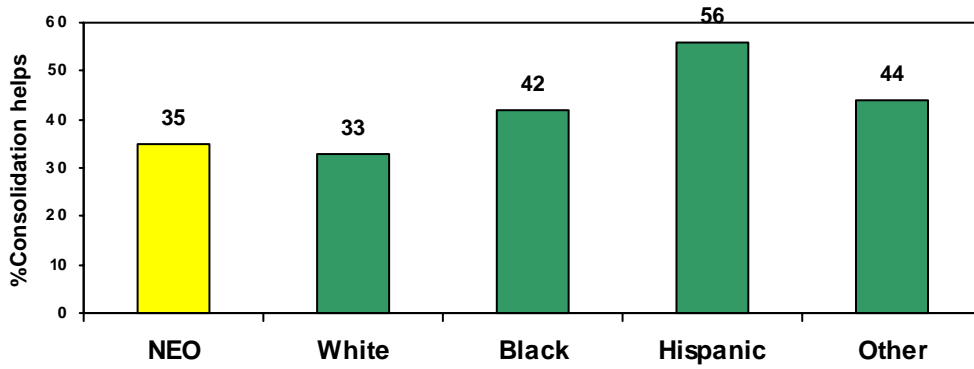


Chart 23c. Percent who Believe Municipal/County Government Consolidation Would Help. By Race



CONCLUSIONS

The *Third Annual Northeast Ohio Barometer of Economic Attitudes* continues to track the public's perception of the region's general economic progress, as well as their opinions on regionalism and economic development initiatives. The following are key findings that build upon previous year findings:

Our regional identity continues to come into focus. Northeast Ohio residents (ninety-seven percent) identify themselves with the larger community. Depending on where they live, however, they have slightly different views of who else belongs within the region.

Loyalty to the region is not high. Twenty-four percent of Northeast Ohio residents are extremely satisfied with the region as a place to live; the same percentage is extremely likely to recommend the area to a friend. Geauga and Ashland Counties rated the highest in these categories.

Our economic outlook is gloomy and in some cases, has deteriorated from 2003. Forty-six percent of Northeast Ohioans have a negative opinion of the region's economy compared to thirteen percent with a positive opinion. In 2003, only thirty-six percent had a negative opinion. Fifty-eight percent feel the economy is worse today than it was five years ago and twenty-six percent feel it will be even worse in five years.

We recognize that the region has strong assets upon which it can build. Residents have high regard for the region's sports teams, parks and green space, the quality of higher education, cultural opportunities, quality healthcare, and the physical beauty. These are important quality of life features. Residents also rate our core cities better than other cities rate themselves for multiple assets: affordable housing, traffic, parks (in Akron), and public transportation (in Cleveland). Northeast Ohio shines as a place to live for families with children.

We have clear opinions on where our priorities should lie to improve economic development. Northeast Ohioans are strongly in favor of retraining today's workers for new job opportunities and improving affordable housing throughout the region so workers can live close to jobs. There is marginally more support for nurturing local hi-tech business start-ups instead of wooing large corporations from other places.

Regionalism has a clear role to play in Northeast Ohio. Northeast Ohioans embrace the idea of counties working together on everything from job creation, an economic growth plan, business support, international business attraction, tourism and job retraining. Only land use planning does not garner support for regional cooperation.

We favor a regional system of school funding. A clear majority of Northeast Ohioans (56 percent) favor a system that would increase equity across public school districts even though it could be at the expense of wealthier school districts. Support cuts across racial lines and increases with education levels.

APPENDIX.

2006 Survey Instrument

Hello, this is _____, with The Gallup Poll. We are conducting a survey for a group of community organizations in Northeast Ohio to find out how you feel about living in this area. Your responses are completely confidential and will only be used in statistical summaries.

S1. Of the adults age 18 or older in your household, I need to speak to the one who had the most recent birthday. Would that be you or someone else in the household?

- 1 Yes, respondent available - **(Continue)**
- 4 No - **(Ask to speak to correct person and reset to Introduction)**
- 5 No such person in household - **(Thank and Terminate)**
- 7 Respondent not available - **(Set time to call back)**
- 8 (Refused) - **(Thank and Terminate)** _____ (1002)

S2. In what county do you live?

- 01 Cuyahoga (ky-ah-HO-gah)
- 02 Lorain (n=150)
- 03 Medina (n=150) (meh-DINE-uh)
- 04 Summit
- 05 Portage (n=100) (POR-dedge)
- 06 Geauga (n=100) (gee-AWH-gah)
- 07 Lake (n=150)
- 08 Stark (n=200)
- 09 Mahoning (n=200) (ma-HO-ning)
- 10 Trumbull (n=100)
- 11 Ashtabula (n=100) (ash-tub-YOU-la)
- 12 Columbiana (n=100) (ko-lum-bee-ANNA)
- 13 Wayne (n=100)
- 14 Ashland (n=100)
- 15 Carroll (n=50)

- 16 Other/DK/Refused

S3. **(If code 01 in S2, ask:)** Do you live in the city of Cleveland?

- 1 Yes (n=150)
- 2 No (n=150)

- 3 (DK)
- 4 (Refused)

S4. **(If code 04 in S2, ask:)** Do you live in the city of Akron (ACK-run)?

1 Yes (n=150)

2 No (n=150)

3 (DK)

(Thank and Terminate)

4 (Refused)

(Thank and Terminate) _____

Barometer questions

1. This survey asks questions about Northeast Ohio. First, do you think of **(Insert County from S2)** county as being part of Northeast Ohio?

1 Yes

2 No

3 (DK)

4 (Refused)

2. I'm going to read you a list of locations, and for each one, please tell me whether you think of that location as being part of Northeast Ohio. How about **(Read A-G, then H-K, as appropriate)**

1 Yes

2 No

3 (DK)

4 (Refused)

A. Cleveland

B. Akron

C. Canton

D. Lorain

E. Medina

F. Warren

G. Mentor

H. **(If code 1 in 2-D)** Sandusky

I. **(If code 1 in 2-E)** Mansfield

K. **(If code 1 in 2-G)** Ashtabula

(READ:) [(If code 2-4 in #1, Read:) For the purposes of this survey, please consider **(Insert County from S2)** to be part of Northeast Ohio.] Now, I'd like to ask you some questions about living in Northeast Ohio.

2a. Suppose 1 represents the worst possible area to live in you can imagine and 5 stands for the best possible area to live in, what number from one-to-five would you choose to indicate how you feel about Northeast Ohio as a place to live today?

5 Best
4
3
2
1 Worst

8 (DK)
9 (Refused)

2b. How about five years from now? What number from one-to-five would you choose to indicate where you think **(response in Sa)** will be five years from now as a place to live?

5 Best
4
3
2
1 Worst

8 (DK)
9 (Refused)

3. Taking everything into account, how satisfied are you with Northeast Ohio as a place to live? Please use a five-point scale, where 5 means you are extremely satisfied and 1 means you are not at all satisfied.

5 Extremely satisfied
4
3
2
1 Not at all satisfied

7 (Not applicable)
8 (DK)
9 (Refused)

4. How likely are you to continue to live in Northeast Ohio? Please use a five-point scale, where 5 means you are extremely likely and 1 means you are not at all likely.

5 Extremely likely

4

3

2

1 Not at all likely

7 (Not applicable)

8 (DK)

9 (Refused)

5. How likely are you to recommend Northeast Ohio to a friend or associate as a place to live? Please use a five-point scale, where 5 means you are extremely likely and 1 means you are not at all likely.

5 Extremely likely

4

3

2

1 Not at all likely

7 (Not applicable)

8 (DK)

9 (Refused)

6. On a one-to-five rating scale, where 1 means very bad and 5 means very good, how would you rate economic conditions in Northeast Ohio today?

5 Very good

4

3

2

1 Very bad

8 (DK)

9 (Refused)

7. Compared to five years ago, would you say that the economy in Northeast Ohio is better off today, worse off, or about the same?

1 Better

2 Worse

3 About the same

- 4 (DK)
- 5 (Refused)

9. Five years from now, do you think that the economy in Northeast Ohio will be better off, worse off, or about the same as it is today?

- 1 Better
- 2 Worse
- 3 About the same

- 4 (DK)
- 5 (Refused)

10. In your opinion, does Northeast Ohio offer the kind of advantages and opportunities that will keep young people and the most talented people from leaving the area for other places?

- 1 Yes
- 2 No
- 3 (DK)
- 4 (Refused)

12. On a five-point rating scale, where 5 means very good and 1 means very bad, how would you rate the following in Northeast Ohio? How about **Read and Rotate S-DD**?

- 5 Very good
- 4
- 3
- 2
- 1 Very bad

- 7 (Not applicable)
- 8 (DK)
- 9 (Refused)

- S. Quality of the public schools in your city
- T. The availability of cultural opportunities, such as theater, museums, and music
- U. Offering job opportunities in your field
- V. Having a vibrant nightlife with clubs, bars, restaurants etc.
- W. Offering affordable housing
- X. Availability of public transportation
- Y. Being able to get from place to place with little traffic

12. (Continued:)

- Z. Availability of quality health care
- AA. The climate in Northeast Ohio
- BB. Northeast Ohio's beauty or physical setting
- CC. The availability of outdoor parks, playgrounds, and trails
- DD. Northeast Ohio as a place to live for sports fans

12a. How would you rate Northeast Ohio as a place to live for the following kinds of people? Use the same five point scale where 5 means very good and 1 means very bad. How about **(read and rotate A-G)**?

- 5 Very good
- 4
- 3
- 2
- 1 Very bad

- 8 (DK)
- 9 (Refused)

- A. Recent college graduates looking to enter the job market
- B. Young, single people
- C. Families with children
- D. Racial and ethnic minorities
- E. Immigrants from other countries
- F. Entrepreneurs and people starting new businesses
- G. People living below the poverty line

Economic Development questions

13. How much do you know about Northeast Ohio's efforts to attract and help businesses, and to create and keep jobs? Would you say a great deal, some, not too much, or nothing at all?

- 4 Great deal
- 3 Some
- 2 Not too much
- 1 Nothing at all

- 5 (DK)
- 6 (Refused)

14. From what you know, how do you think Northeast Ohio is doing at each of the following? Please use a scale from 1 to 5 where 1 is very bad, and 5 is very good. If you're not sure, please say so. **(Read A-D)**

5 Very good

4

3

2

1 Very bad

6 (DK)

7 (Refused)

A. Attracting new businesses or companies to move here

B. Helping existing businesses to grow

C. Creating new jobs

D. Keeping jobs from leaving the area

(READ:) Now I'm going to read you three pairs of statements. For each pair, please tell me which of the two statements would do more to improve the economy in Northeast Ohio.

14a. FIRST, how about, **(read and rotate 1-2)**?

1 Re-training today's workers for new job opportunities, or

2 Encouraging more people to get a college university degree for jobs of the future, or

3 (DK)

4 (Refused)

14b. SECOND, how about, **(read and rotate 1-2)**?

1 Improving access to public transportation so workers can get to where the jobs are, or

2 Improving affordable housing throughout the region so workers can live near where the jobs are, or

3 (DK)

4 (Refused)

14c. FINALLY, how about, **(read and rotate 1-2)**?

1 Attracting large corporations from other places, or

2 Supporting hi-tech business start-ups locally, or

3 (DK)

4 (Refused)

Regionalism questions

17. Next, thinking about regionalism, please indicate whether you would like to see counties working together on each of the following issues or whether each county should work on its own. If you're not sure or have no opinion, just say so. How about **(Read and Rotate A-F, then G)? (Read if necessary:)** Should counties work together on this issue, or should each county work separately on this issue?

- 1 Counties should work together
- 2 Each county should work on its own
- 3 (DK/No opinion)
- 4 (Refused)

- A. Supporting job creation
- B. Supporting businesses
- C. Attracting international businesses
- D. Promoting tourism
- E. Training workers for new job opportunities

- F. Developing an overall plan for economic growth
- G. Deciding whether land is used for housing, businesses, agriculture, or other purposes _____

17a. Next, I will ask you a question about how public schools in Northeast Ohio are funded. Would you favor or oppose having a regional system of school funding that would increase equity across public school districts but could be at the expense of wealthier school districts?

- 1 Favor
- 2 Oppose
- 3 (DK)
- 4 (Refused)

17b. Next, a question about safety services in Northeast Ohio. Do you favor or oppose consolidation of fire and police services across jurisdictions that could save taxpayers money but could reduce local control?

- 1 Favor
- 2 Oppose
- 3 (DK)
- 4 (Refused)

17c. What if all of the municipal governments within your county merged with your county government into one single government entity? Do you think that would help or hurt your local area?

- 1 Help
- 2 Hurt
- 3 (DK)
- 4 (Refused)

DEMOGRAPHICS BEGIN HERE:

(READ:) Finally, I would like to ask you a few questions for statistical purposes only.

D2. GENDER: **(Code only, Do not ask)**

- 1 Male
- 2 Female

D5. Including yourself, how many members of this household are age 18 or older? (Open ended **and code actual number**)

- 97 97+
- 98 (DK)
- 99 (Refused)

D6. Please tell me your age. (Open ended **and code actual age**)

- 00 (Refused)
- 99 99+

D7. Are you of Hispanic or Latino origin or descent?

- 1 Yes
- 2 No
- 3 (DK)
- 4 (Refused)

D8. Which of these groups best describes your racial background? **(Read 06-10, then 01)?**

- 01 Or something else (list)
- 02 (DK)
- 03 (Refused)
- 06 White
- 07 Black or African-American
- 08 Asian **(If necessary, read:)** includes Chinese, Filipino, Japanese, Asian Indian, Korean, Vietnamese, other Asian)
- 09 American Indian or Alaskan Native

- 10 Native Hawaiian or other Pacific Islander
- 11 (Hispanic)
- 12 (More than one)

D9. What is the highest level of education you have completed? (Open ended and code)

- 1 Less than high school graduate
- 2 High school graduate
- 3 Some college or trade/technical/vocational training beyond high school
- 4 College graduate
- 5 Postgraduate work/degree

- 6 (DK)
- 7 (Refused)

D9a. What is your religious preference – Protestant, Roman Catholic, Jewish, Muslim, an Orthodox religion such as the Greek or Russian Orthodox Church, or something else?

- 01 Something else (list)
- 02 (DK)
- 03 (Refused)
- 04 (None)
- 05 HOLD

- 06 Protestant
- 07 Roman Catholic
- 08 Jewish
- 09 Muslim
- 10 Greek or Russian Orthodox

D10. Are you employed full-time, employed part-time, retired, a homemaker, a student, unemployed but looking for work, or unemployed and not looking for work?

- 01 Employed full-time
- 02 Employed part-time
- 03 Retired
- 04 Homemaker
- 05 Student
- 06 Unemployed but looking for work
- 07 Unemployed and not looking for work
- 08 (Disabled/unable to work)
- 09 (Other) (do not list)

- 10 (DK)
- 11 (Refused)

D10a. **(If code 01-02 in D10, ask:)** Do you work in **(Response from S2)** county or in another county?

- 1 In county
- 2 In another county
- 3 (Not applicable)
- 4 (DK)
- 5 (Refused)

D11. Is your total annual household income, before taxes, over or under \$45,000?

- (If Under, ask:)** Is it over or under \$35,000?
- (If Under, ask:)** Is it over or under \$25,000?
- (If Under, ask:)** Is it over or under \$15,000?

- (If Over, ask:)** Is it over or under \$55,000?
- (If Over, ask:)** Is it over or under \$75,000?
- (If Over, ask:)** Is it over or under \$100,000?

- 01 Under \$15,000
- 02 \$15,000 to \$24,999
- 03 \$25,000 to \$34,999
- 04 \$35,000 to \$44,999
- 05 \$45,000 to \$54,999
- 06 \$55,000 to \$74,999
- 07 \$75,000 to \$99,999
- 08 \$100,000 or over

- 09 (DK)
- 10 (Refused)

D12. How many different phone NUMBERS do you have coming into your household, not including lines dedicated to a fax machine, modem, or used strictly for business purposes? Do not include cellular phones. (Open ended and code)

- 1 One
- 2 Two
- 3 Three
- 4 Four
- 5 Five or more

- 6 (DK)
- 7 (Refused)