



# LEADERSLISTEN)))

## ECONOMIC DEVELOPMENT SURVEY ACTIONABLE INSIGHTS





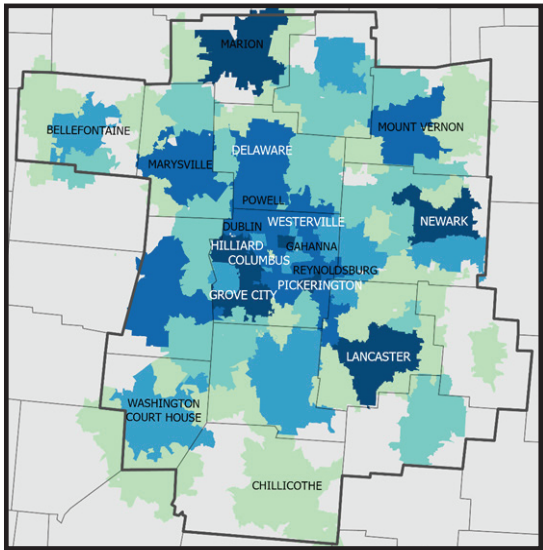
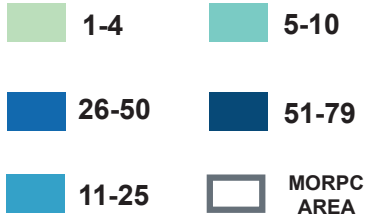
# THE LEADERS LISTEN SURVEY

MORPC’s most recent survey, Leaders Listen: Economic Development, was conducted in partnership with Measurement Resources Company and The Columbus Dispatch has afforded us an opportunity to learn from area residents about their economic development priorities and concerns. We were fortunate to gather responses from **2,100+ residents** during a period of frequent high-profile announcements pertaining to very large investments and employers locating or expanding operations in the region.

Previous Actionable Insights reports have presented the takeaways from our transportation, sustainability, and housing surveys. Residents shared their staunch support for public transit, bike & pedestrian infrastructure, conserving and protecting our environment, and addressing housing affordability and availability in those surveys. While the economic development survey added support for many of those initial findings, it also provided a window into opinions on the new topics of jobs, cost of living, childcare, built infrastructure and utilities.

## RESPONSES BY ZIP CODE

### Number of Responses



## IN THE NEWS: BILLION DOLLAR INVESTMENTS



## THE GROWING CENTRAL OHIO REGION

MORPC encompasses the 15-county Central Ohio Region with an estimated 2.4 million residents. **The region is expected to grow to over 3.1 million people by 2050.**

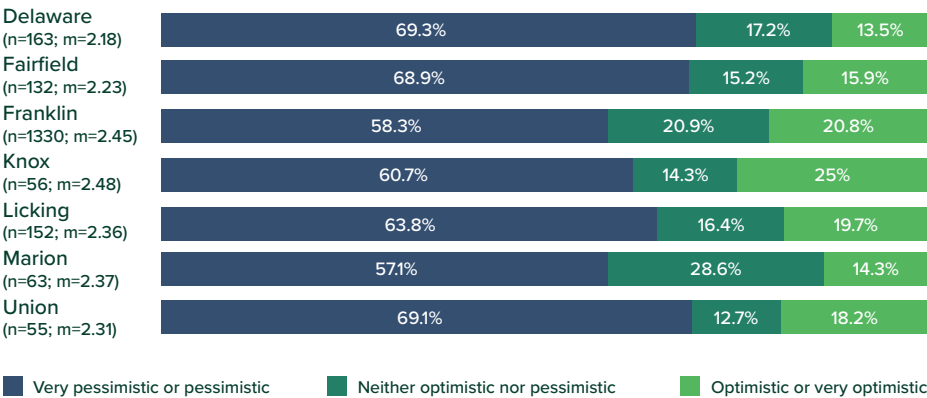
Steady growth means welcoming 350K workers and 720K new neighbors (270K households); bringing both challenges and opportunities.

## HOUSING & COST-OF-LIVING TOP CONCERNS

Respondents overwhelmingly identified “housing is too expensive” (73%) as a “top three” economic challenge in their communities. Only 32% of residents were optimistic about the future of the housing market. Fewer still, just 19%, were optimistic about the cost of living.

Increasing the supply of housing which “workers can afford” topped the list of desired initiatives.

### Cost-of-Living Optimism vs Pessimism by Geography



## ACTIONABLE INSIGHTS

### Biggest Concerns for Local Economy

1. “Housing is too expensive”
2. “Too few high-paying jobs”
3. “Limited housing options”
4. “Lack of affordable childcare”
5. “Too few job opportunities”

### Most Impactful Economic Initiatives

1. Increase housing “workers can afford”
2. Support “small businesses & entrepreneurs”
3. Attract “new businesses & industries”
4. Support “existing businesses & headquarters”
5. “Enhance public transit options”

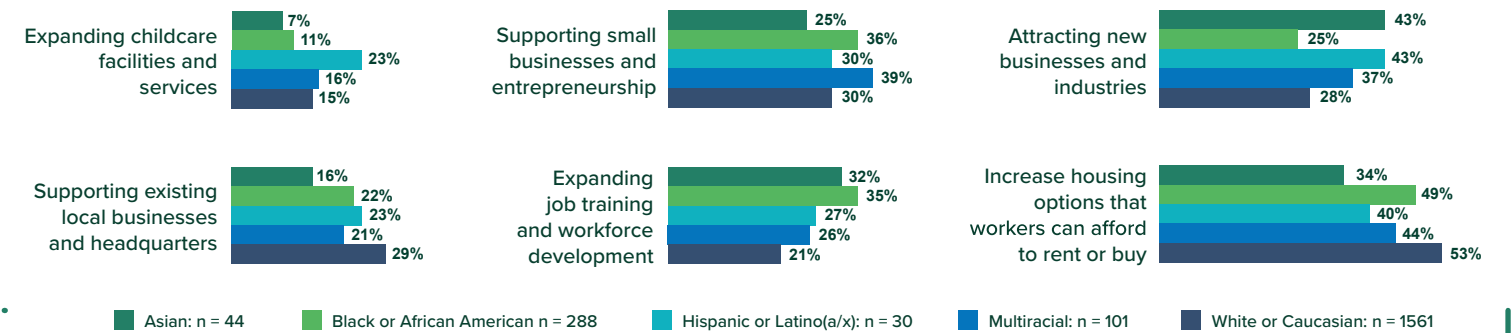


# JOB CHALLENGES MIXED WITH OPTIMISM

Central Ohioans shared that “too few high-paying job opportunities” (36%) is a “top three” economic challenge locally. In contrast, the jobs outlook was a bright spot, with 54% being optimistic about the future, compared to only 21% who were pessimistic.

Minority groups had higher opinions on the relative impacts of business attraction, small business support, and workforce development initiatives than did white residents.

## Initiatives with Greatest Impact in Strengthening Your Community's Economy



# CHILD CARE A MAJOR ISSUE FOR SOME

Childcare is top of mind as well. Just over one-quarter of residents (27%) indicated that the “lack of affordable childcare options” was a “top three” concern for their local economy. However, not all residents are impacted equally.

20% of families with children under 5-years-old, and 8% with older children, reported sacrificing or missing payments on childcare to afford housing, disproportionately impacting women’s workforce participation and career advancement.

## Sacrificing Childcare or Missing Payments to Afford Housing

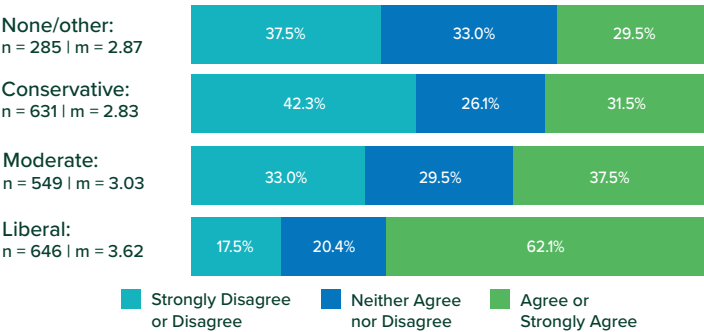


# SUPPORT FOR INFRASTRUCTURE & UTILITIES

Respondents across the political spectrum and urban or rural areas largely agree that we should prioritize improving built infrastructure (66% for; 11% against), utilities capacity (66% for; 10% against), and green energy capacity specifically (54% for; 18% against).

Despite the wide margins of general support for infrastructure and utilities projects, only 42% of residents indicated a willingness to pay higher taxes to fund such projects. Political orientation was a major factor affecting support for higher taxes.

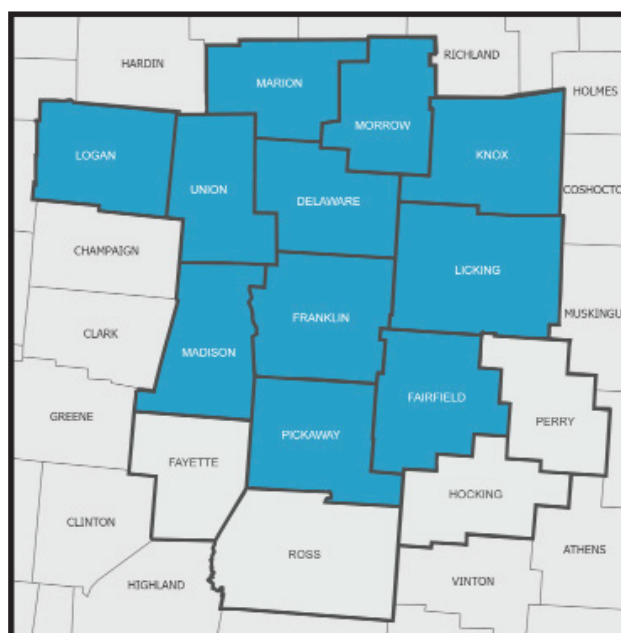
## I Would Support Higher Taxes for More Investment in Workforce Development, Public Services, and Infrastructure (By Political Orientation)



## KEY TAKEAWAYS

- ▲ Residents seem to be finding hope in the number of major job announcements with more optimism on the jobs front than on transportation, the environment, housing, or cost of living.
- ▲ More robust collaboration between community planners and economic development professionals around housing may be advantageous.
- ▲ Childcare is now a top economic development concern, just outranking concerns over the number of job opportunities in our local communities.
- ▲ In some areas, local leaders may need to rethink budgetary priorities and/or find alternative ways to fund needed infrastructure and utility expansion projects.

## ECONOMIC DEVELOPMENT DISTRICT (EDD)



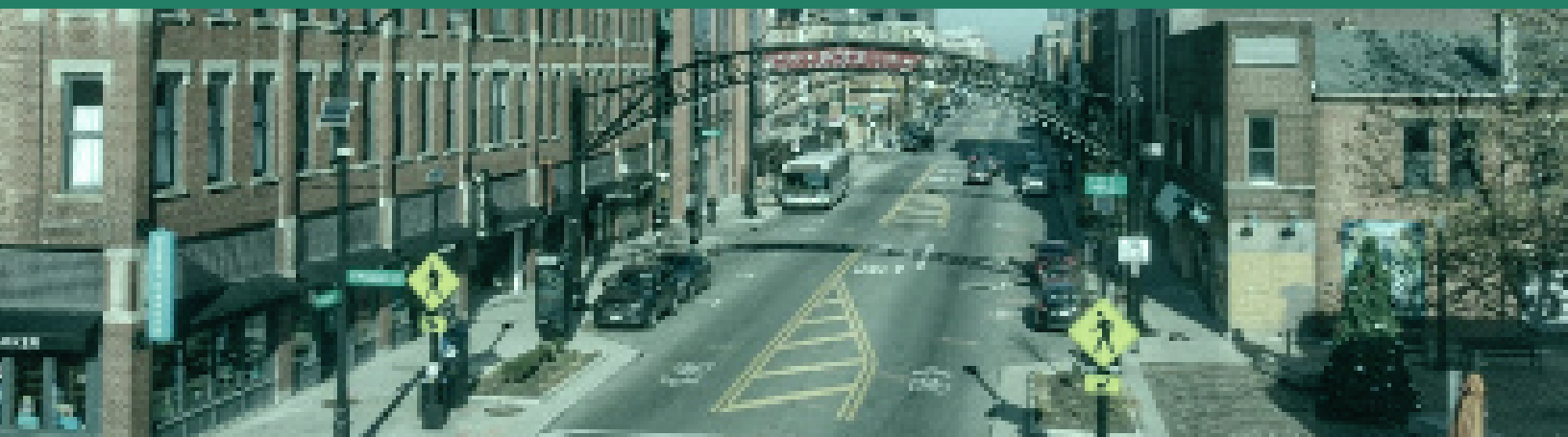
 MORPC AREA

 EDD

## BURGEONING ECONOMIC DEVELOPMENT COLLABORATION

MORPC's economic development work focuses on engaging members on local and regional development priorities, identifying resources and tools to advance initiatives, and setting the conditions for greater regional economic prosperity.

We have developed a ***Comprehensive Economic Development Strategy (CEDS)*** and stood up the ***CEDS Committee*** to develop a roadmap for the 11-county Economic Development District (EDD). This is a collaborative regional effort, bringing together representatives from the public and private sectors, and ensuring leaders are listening to residents' perspectives on key issues as we help to ensure our region gets better as we grow bigger.



# CHALLENGES AND OPPORTUNITIES WITHIN THE ECONOMIC DEVELOPMENT DISTRICT

Considering responses from within the 11-county EDD only, we see residents believe that attracting “new businesses and industries” to their communities, bolstering “existing businesses and headquarters,” and increased support for “small businesses and entrepreneurship” would strengthen their local economies.

Interestingly, neither “access to education and job training programs” nor “disconnect between worker skills and job requirements” were identified as top challenges. In some of the more rural counties where these challenges are often discussed, residents ranked them even lower. Reinforcing this finding, we found when identifying initiatives which would have the biggest positive impact on local economies, neither “expanding job training and workforce development” nor “increasing public school funding” were rated highly.

Counterintuitively, rural communities were also the least likely to agree that “Central Ohio has the highly skilled workforce needed to meet the job requirements of the future,” or that “The local education system adequately prepares students for the job market.” More research may be needed to identify which types of interventions rural communities believe would best address these concerns.

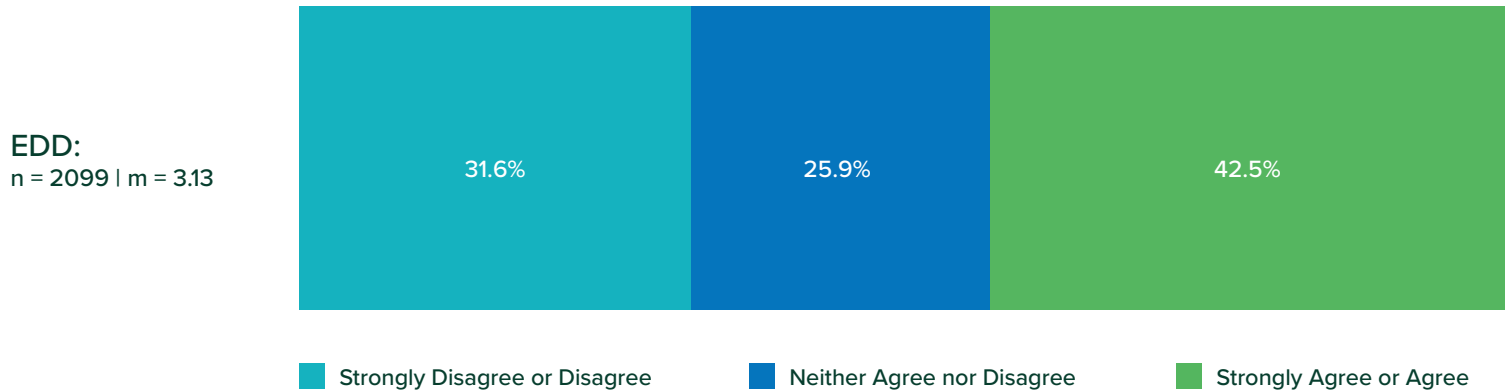
## ECONOMIC DEVELOPMENT DISTRICT TOP CONCERNS

- ▲ Housing is too expensive (71.8%)
- ▲ Too few high-paying job opportunities (35.1%)
- ▲ Limited housing options (30.4%)

## ECONOMIC DEVELOPMENT DISTRICT TOP INITIATIVES

- ▲ Increase housing options that workers can afford to rent or buy (50.6%)
- ▲ Supporting small businesses and entrepreneurship (31.1%)
- ▲ Attracting new businesses and industries (27.6%)

## ECONOMIC DEVELOPMENT DISTRICT “WOULD SUPPORT HIGHER TAXES”



# THE REPORT CARD

## OVERALL SATISFACTION WITH PLANNERS AND DECISION MAKERS

My Transportation Needs	-31%	+36%
Central Ohio's Economic Development Needs	-28%	+37%
Central Ohio's Environmental Quality Needs	-32%	+31%
My Housing Needs	-44%	+30%



**Dissatisfied or Very Dissatisfied**



**Satisfied or Very Satisfied**