

LEADERS LISTEN)))

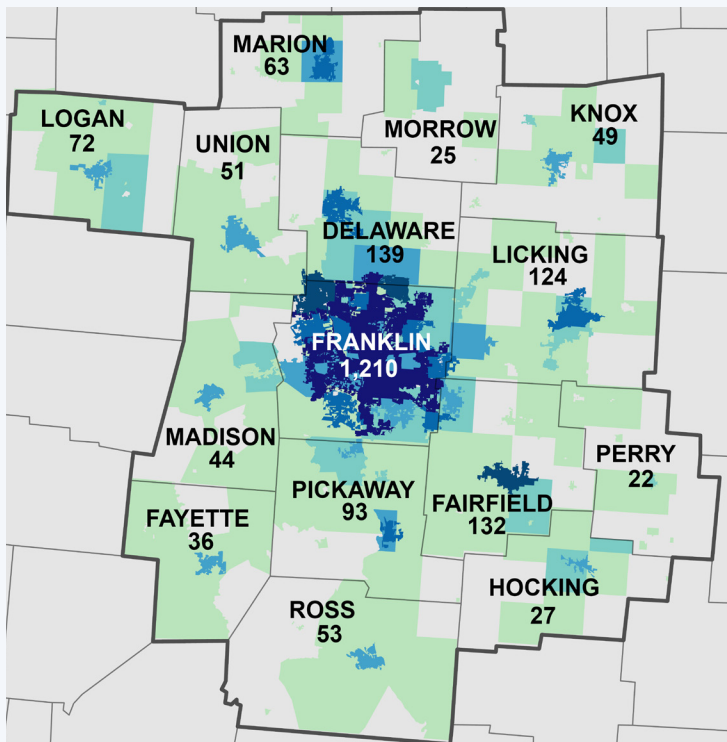
Sustainability Survey
Actionable Insights

2026

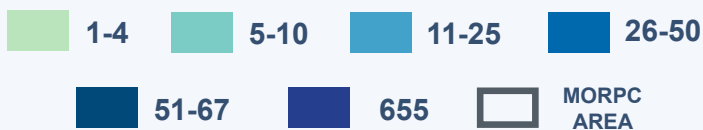
About Leaders Listen

The Mid-Ohio Regional Planning Commission (MORPC) began the Leaders Listen survey series in 2023 out of a desire to hear directly from Central Ohio residents about their preferences and experiences in the region. Since that time, with the support of regional partners, MORPC has polled residents of our 15-county area on the topics of transportation, housing, economic development, and environmental sustainability. In each case, we have obtained a geographically and demographically diverse sample of 2,000+ respondents. The insights drawn from these responses are shared with local leaders and planners to inform their work as they strive to best serve our communities and help the region to get better as it grows bigger.

Leaders Listen: Sustainability 2025 Survey Respondents



Number of Responses

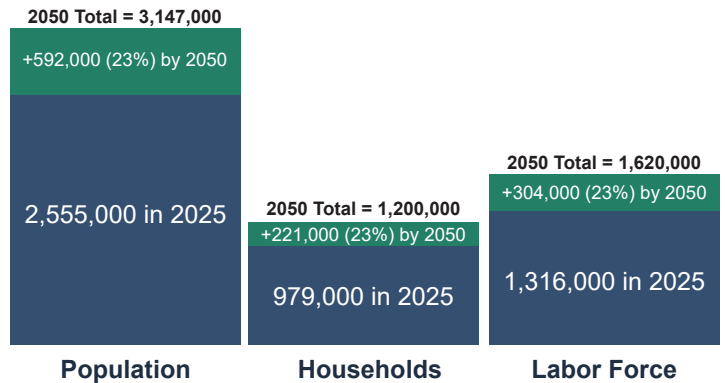


The Leaders Listen: Sustainability (2025) survey was conducted in close collaboration with Central Ohio based Measurement Resources Company to ensure implementation of survey best practices and quality-controlled results reporting.

Growth Context

Central Ohio is, by several measures, the fastest growing region in the Midwest. The region has seen continued steady population growth, putting it on track to increase from 2.5 million to 3.1 million people by the year 2050. Even with the area's past development patterns, this level of population growth has put pressure on our natural environment and resources.

CENTRAL OHIO GROWTH (MORPC FORECAST)



However, over the past several years the region's growth context has been evolving. The economic shift towards what some refer to as the "Silicon Heartland," has meant attracting and expanding high-tech manufacturing mega projects and hyperscale data centers. This has elevated concerns about the region's power and water supplies, air quality, land use, and transportation infrastructure.

Residents are paying attention. Central Ohioans have strong preferences for environmental protection and preservation. This presents a challenge for leaders to find ways to manage our growth while also preserving greenspace, improving water and air quality, and stepping up efforts to address climate change.

Report Overview

This most recent survey was MORPC's first opportunity to revisit the topic area of environmental sustainability. This second survey dug deeper into the details of surprising prior results and expanded the question set to additional related questions.

Whether questions were repeated from the prior survey or were newly added, we found strong support for efforts to preserve and protect our environment and natural resources. Even in rural counties, where media coverage or public comments may suggest opposition, significantly more residents support protection efforts than oppose them; often by a margin of 2 to 1 or greater.

New Topic Areas

This updated sustainability report captures residents' perspectives on a variety of additional program and policy domains. The added topics are wide-ranging, including both longstanding challenges and emerging issues:

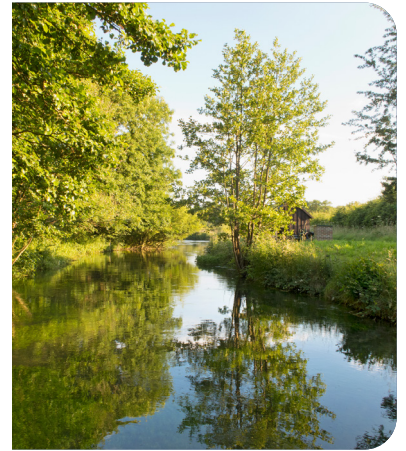
- ▲ Prioritization of power generation by source type
- ▲ Weighing power supply challenges with industry growth
- ▲ Expansion of the Central Ohio Greenway (COG) trail network
- ▲ Human health impacts of "forever chemicals"
- ▲ Attractiveness of different food waste composting services
- ▲ Community preparedness for natural disasters

Actionable Insights

A quick glance at the results reveals clear messages from a significant majority of survey respondents. **There is overwhelming support for "going green."**

Three "High" Priorities for Conservation

- ▲ "Conservation of waterways" **(91%)**
- ▲ "Conservation of green spaces" **(87%)**
- ▲ "Expanding the public greenway multi-use path network" **(82%)**



Three "High" Priorities for Energy Generation

- ▲ "Prevent blackouts of brownouts" **(88%)**
- ▲ "Keep my energy costs low" **(81%)**
- ▲ "Increase sustainable or renewable energy generation" **(75%)**
 - Natural gas generation trailed by 27 percentage points
 - Coal generation trailed renewables by 40 percentage points

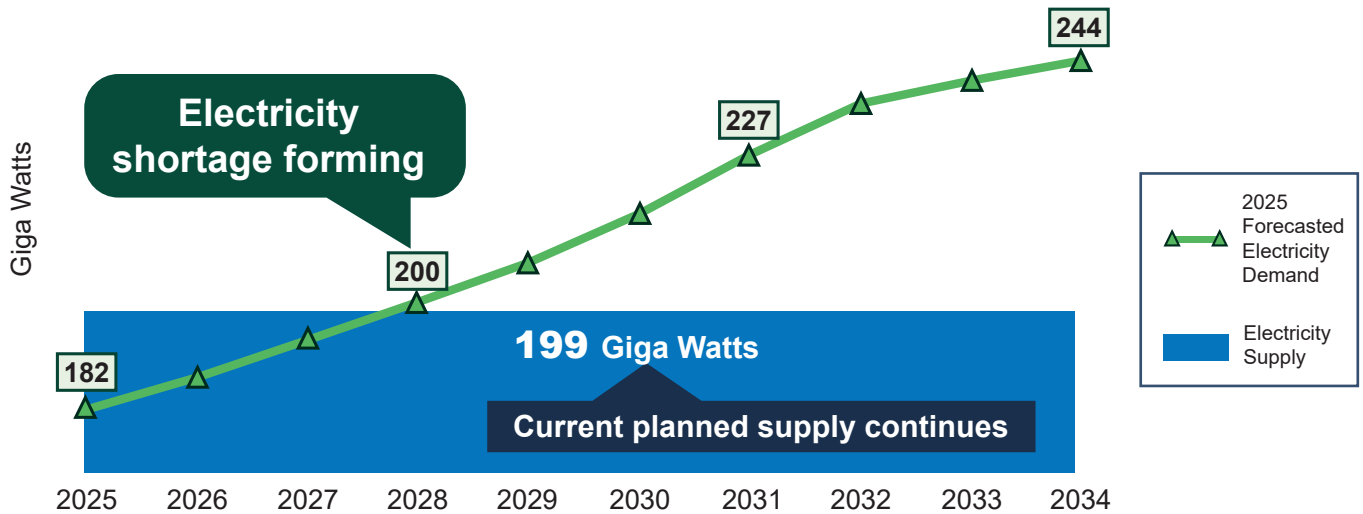


Three Areas for "Stronger" Pollution Reduction Measures

- ▲ "Strengthening pollution reduction policies:" **(84%)**
 - "Central Ohio is doing enough to reduce pollution contributing to climate change" **(only 23% of respondents agree)**
- ▲ "Expand energy efficiency programs and policies" **(76%)**
- ▲ "Expand electric vehicle charging infrastructure" **(55% support; only 17% oppose)**



Electric Supply Could Fall Short of Demand by 2028



Regional Power Priorities

Survey respondents were presented with a scenario derived from a 2025 analysis commissioned by the Ohio Business Roundtable, which forecasted a potential regional electricity shortfall by 2028. The projected shortfall was driven in large part by anticipated development of energy-intensive industry, especially data centers.

Central Ohioans were asked what local leaders and decision makers should focus on as they work to meet the region’s energy needs. While respondents were nearly unanimous in their desires to prevent blackouts and to keep their energy costs low, relatively little importance was placed upon increasing power generation from fossil fuels. This deprioritizing of high emission sources is consistent with the current finding that only 23% of residents believe we are “doing enough” to combat climate pollution.

Alternatively, a significant majority of residents believe it is important that the region takes a three-pronged approach by leaning into renewables, energy efficiency, and even slowing development.

- ▲ **91% of residents** believe it is “Moderately to Extremely” important to expand renewable and sustainable energy generation, with **77% responding** it is “Very to Extremely” important
 - Support increased slightly when “small-scale nuclear” was included as an option
- ▲ **91% of residents** believe it is “Moderately to Extremely” important to expand energy efficiency programs and policies, with **76% responding** it is “Very to Extremely” important
- ▲ **76% of residents** believe it is “Moderately to Extremely” important to “Slow down development of energy intensive industries,” with **49% responding** it is “Very to Extremely” important

Expanding renewable & sustainable energy generation infrastructure (e.g., small-scale nuclear, wind, solar)

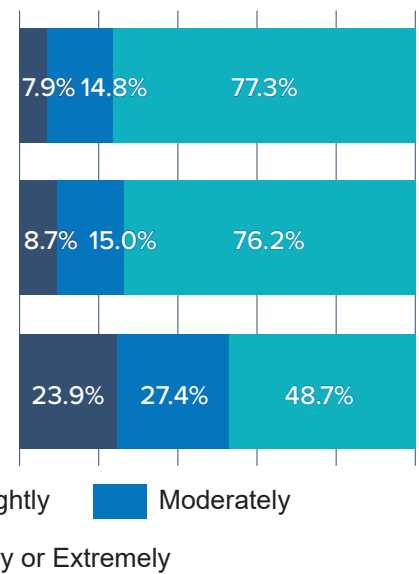
Support
(n = 2,026 | m = 4.20)

Expand energy efficiency programs and policies

Importance
(n = 2,070 | m = 4.10)

Slow down development of energy intensive industries

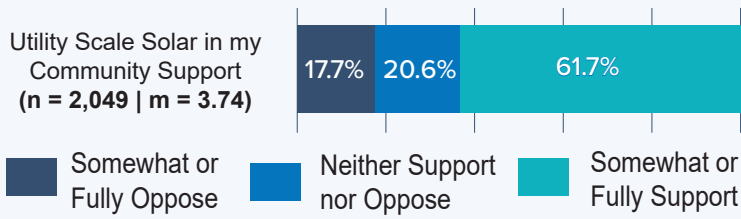
Importance
(n = 1,874 | m = 3.41)



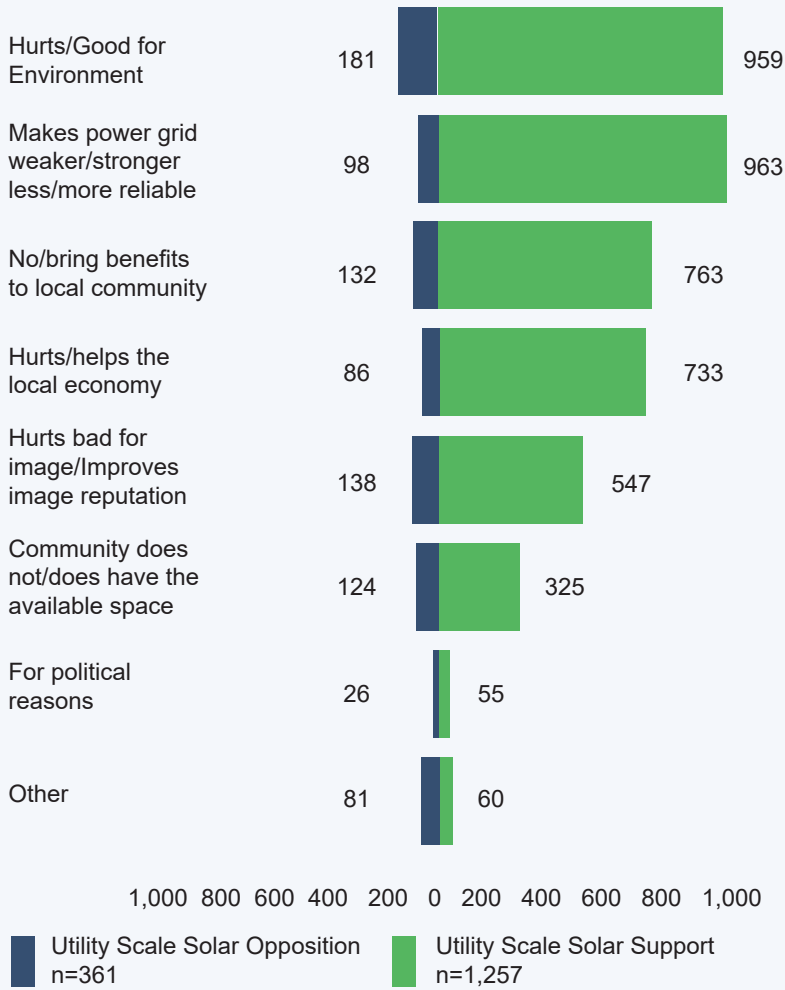
It is not clear from the survey results why fewer residents place high importance on reducing an emerging source of massive energy consumption in the event of projected power supply shortages. It is possible that a subset of residents is either not willing to sacrifice expected job and investment gains and/or believe that prioritizing renewables and energy efficiency will be sufficient to meet our future energy needs apace with development.

Solar Support Specifics

Survey findings of high public support for utility scale solar developments within our local communities were consistent with past results.



There continues to be strong demand for cleaner energy, over fossil fuel expansion, with 62% of respondents supporting large-scale solar, with supporters citing grid reliability (76%), environmental benefits (76%), and local economic gains (61%), aligning clean energy with regional competitiveness and workforce growth.



Interestingly, among the 18% of respondents who oppose utility scale solar locally, many cited the same considerations as supporters, but as reasons for their opposition. The most commonly held beliefs among those who are opposed are that such developments hurt the environment (50%), are bad for community image (38%), and bring no benefit to the local community (37%).

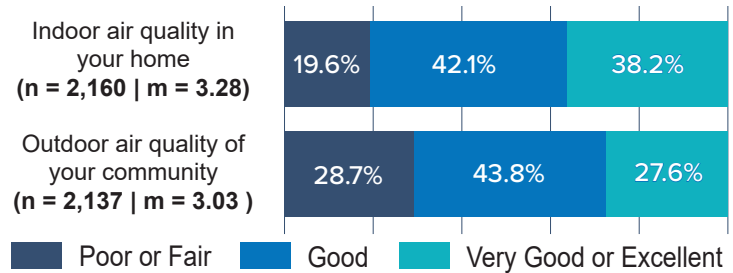
Air and Water Quality Questions

Survey findings of mixed perceptions on air and water quality throughout the region are consistent with past results. Recognizing that we must strive to continually improve the quality of our air and water, we continue to find levels and locations of resident concerns which do not correlate to any known regulatory data.

29% of residents believe the outdoor air quality in their community to be only "Poor to Fair" and not "Good" "Very Good" or "Excellent."

Reasons given by survey respondents for citing less than good air quality predominantly focused on the outdoor environment and included vehicle emissions, factory emissions, noticeable odor, difficulty breathing, and visible dust, smoke, or smog.

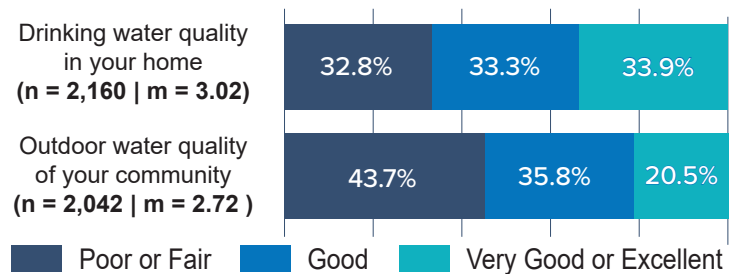
HOW WOULD YOU RATE YOUR AIR QUALITY?



33% and 44% of residents believe their drinking water and outdoor water quality, respectively, to be only "Poor to Fair" and not "Good" "Very Good" or "Excellent."

Reasons given by survey respondents for citing less than good water quality was split between drinking water and outdoor water bodies. For drinking water, respondents cited off-putting taste, noticeable odor, and the presence of lead pipes. For outdoor water, respondents cited sources of pollution including visible trash, fertilizer runoff, and sewage overflow, as well as negative water appearance, and unpleasant smell.

HOW WOULD YOU RATE YOUR WATER QUALITY?



This apparent discrepancy may be partially explained by individuals' varied concepts of "quality." While some responses cited characteristics which do not necessarily correlate to regulatory definitions of poor quality, other responses did so, which highlights a potential need for further research in this area.

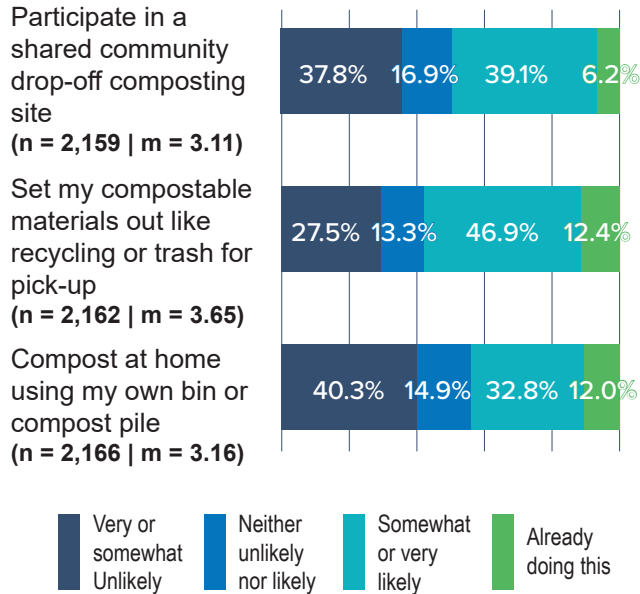
Program Possibilities?

Three new topic areas were included in the latest round of survey questions which point toward potential awareness campaign or programming opportunities, in the areas of food waste composting, PFAS exposure, and natural disaster preparedness. To find out how residents in your community responded or to connect with the MORPC team, please email info@morpc.org.

Community Composting

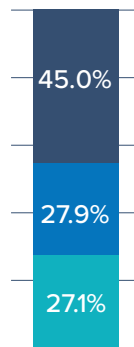
Survey responses suggest that food waste composting services throughout the region have low rates of public participation. Curbside pickup service and at home composting are the most popular methods, with regional average participation of about 12% each. However, an additional 47% of area residents indicated they would be “somewhat to very” likely to participate in curbside pickup-based composting, which stood out as the most attractive option to residents who are not already participating in such a program.

How likely are you to do the following composting practices?



How familiar are you with the term “forever chemicals” or PFAS (per- and polyfluoroalkyl substances) (n = 2,209 | m = 2.62)

- Never heard of or don't know what it means
- Know a little
- Know a fair amount or very familiar



Forever Chemicals

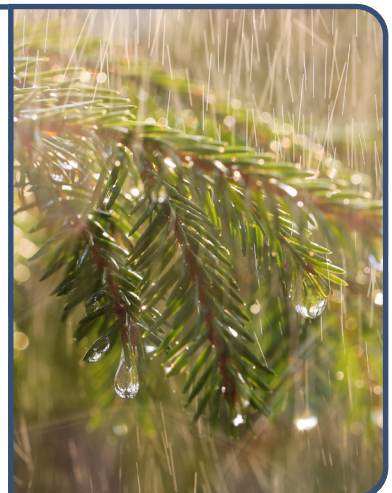
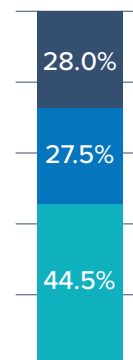
45% of respondents are largely unfamiliar of Per- and Polyfluoroalkyl Substances (PFAS) also known as “forever-chemicals.” Of those residents who know “a little” or are more familiar with forever chemicals, 54% believe that PFAS have no or only a mild health impact. While the health impacts are not yet fully understood, the Centers for Disease Control and Prevention (CDC) suggests that increased exposure to PFAS have been linked to a wide range of negative health outcomes from mild to more severe.

Natural Disaster Preparedness

Less than half of respondents (45%) agreed that their community is “well prepared” to handle severe weather events. While less only 28% actively disagree that their community is well prepared, the low overall agreement suggests that communities may need to take additional steps to meet residents’ expectations regarding the handling severe weather events or better communicate with residents about the effectiveness of existing measures.

Overall, my community is well prepared to handle the impacts from severe weather events such as storms, floods, extreme temperatures, and droughts (n = 2,007 | m = 3.19)

- Strongly Disagree or Disagree
- Neither Disagree nor Agree
- Agree or Strongly Agree



THE REPORT CARD

OVERALL SATISFACTION WITH PLANNERS AND DECISION MAKERS IN CENTRAL OHIO ON ADDRESSING THE FOLLOWING SUBJECTS



Central Ohio's Environmental Quality Needs
(n = 1,864 | m = 2.67)



My Housing Needs
(n = 1,904 | m = 2.79)



Central Ohio's Economic Development Needs
(n = 1,855 | m = 2.71)



My Transportation Needs
(n = 1,833 | m = 2.79)



OUR REGION'S FEEDBACK

"I check online sources for daily air quality and there seems to be frequent high counts of 'particulate matter.'"

- Marion Twp. (Marion Co.) Resident

"I'm concerned that energy-intensive industries are not paying for their share of energy usage."

- Columbus Resident

"Encourage or require stronger stormwater standards to reduce runoff, flooding, erosion and improve ground water recharge in face of increasing extreme weather events."

- Liberty Twp. (Delaware Co.) Resident

"I enjoy kayaking, fishing and generally being outdoors. I do not feel the quality of waterways is as good as they used to be."

- Reynoldsburg Resident

"Areas like medians, rooftops, freeway ramp areas, government building rooftops, city grounds, are areas that should be used for solar panels, renewable energy, etc."

- Columbus Resident



MID-OHIO REGIONAL
MORPC
PLANNING COMMISSION

FOR MORE INFORMATION

Dave Dixon

Director of Data Analytics & Strategy
ddixon@morpc.org
614.233.4147

Brandi Whetstone

Sustainability Director
bwhetstone@morpc.org
614.233.4174

Mid-Ohio Regional Planning Commission

111 Liberty St. Suite 100
Columbus, Ohio 43215
P. 614.228.2663 | F. 614.228.1904
info@morpc.org | *www.morpc.org*

