Community Research Institute

Downtown Cleveland Alliance

Perceptions of Downtown Cleveland as a Business Location Opportunity

Survey of Northeast Ohio Residents

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The Baldwin-Wallace College Community Research Institute

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Executive Summary

The Baldwin-Wallace College Community Research Institute (CRI) was asked by the Downtown Cleveland Alliance (DCA) to conduct a survey of residents of Northeast Ohio to measure perceptions about the quality of life in downtown Cleveland, awareness of the DCA and its business center, and about whether downtown Cleveland is conducive to locating a new or growing business. The purpose of the survey is to establish a baseline of data to use to measure subsequent change relative to the 'It's Time to Get Moving' business marketing and action plan launched by the DCA in January 2011. The survey was conducted from February 28th – March 16th. The survey sample involved 600 respondents drawn from the Elyria – Mentor – northern Summit County region completing the survey, producing a margin of error of $\pm$4% at the 95% confidence level. A subgroup of 137 respondents who indicated that they were business entrepreneurs or managers involved in business relocation decisions for their company were asked additional questions concerning the desirability of downtown Cleveland as a business location.

The survey found that all six quality of life indicators were considered important by respondents. 86% ranked access to entertainment options and having a walkable city as 'very important' or 'important.' 'Easy access to public transportation' was ranked at 69%, while having a 'good mix of affordable and high end restaurants' came in at 67%. 'Availability of retail shopping' was ranked as important by 58% of respondents, while 'good K-12 educational opportunities received the lowest ranking at 56%.

The survey asked eight questions about familiarity with improvement projects in downtown Cleveland. Respondents were most familiar with plans for the new casino (63%) and the recent start of the Medical Mart/Convention Center project (58%), while 55% knew about the Euclid Avenue Healthline. 44% were familiar with development of the East Bank of the Flats; 33% with improvements to the Theater District; 32% with plans for restoring Euclid Avenue; 21% with the outdoor space master plan for downtown; and only 10% were familiar with new K-12 school options available in or near the downtown area.

Respondents had a solid awareness of the DCA (50%), while 60% are interested in services supporting business relocation. 28% were aware of the DCA Business Development Center. The survey also found that the Plain Dealer is the most likely source of information about the DCA (29%), followed by TV (19%) and radio (15%). Business associate and friend networks are also important, with 11% - 14% identifying these as sources of awareness about the DCA.

The subsample of business owners and managers (137, 22.8% of all respondents) were comprised largely of small businesses with fewer than ten employees (74%). 41% expect expansion of their business in the next two years, while 15% are considering relocation. When asked to rank six criteria for business location in order of importance, office space cost was ranked as 'most important' by 37% of the subsample. 'Proximity to customers, clients, and business connections' was considered as 'most important' by 36% of the respondents. 'Access to parking' was ranked 'second most important' by 25% of the subgroup, while 15% considered 'employee commute time' as second in importance. The lowest priority was given to access to public transportation (ranked 5th in importance by 28% of the respondents), and 'entertainment and residential options for employees,' which was ranked 'least important' by 28% of the subgroup.

The business owner/manager subgroup was asked a final set of questions about their perceptions of downtown Cleveland as a business location. The results show there are clearly challenges to overcome in convincing entrepreneurs and managers to consider downtown as a preferred location. 28% believe that 'downtown Cleveland offers good opportunities for small business development,' while 52% disagree. The group was split concerning the cost of office space, with 31% agreeing and 24% disagreeing with the statement that 'downtown Cleveland offers good opportunities for reasonably priced office space.' When asked about accessible, affordable parking, 34% believe this is available in downtown, while 59% disagree. However, 79% of the subgroup believes that there are good entertainment options available for people who work in downtown Cleveland.

Recommendations

The survey findings indicate that marketing downtown Cleveland as a place to do business includes opportunities and challenges. The greatest asset that downtown Cleveland offers and is valued by entrepreneurs and business managers is its 'critical mass' of businesses, clients and customers, which offer unique networking opportunities for new and growing businesses. Downtown Cleveland also has a good reputation for entertainment options, which helps to enhance business networking. The challenge in marketing downtown Cleveland as a business location concerns perceptions about the cost of office space and the accessibility and affordability of parking, which it appears contribute to the overall negative perception of downtown Cleveland as being a good location for small business development. Factors that are valued by respondents, which likely includes those considered as part of the 'bohemian' group of entrepreneurs, artists, and professionals (who are most likely to live in or near downtown) include the importance of having a 'walkable city' and accessible public transportation.

The 'It's Time To Get Moving' campaign should continue or consider the following approaches:

* emphasizing the unique opportunities for business-to-business and business-to-client/customer networking offered by being in downtown Cleveland;

* continue/enhance focus on entertainment options available in downtown Cleveland;

* provide comparative information concerning the relative costs of office space and parking in suburban business locations and in downtown Cleveland;

* market the outdoor space master plan to entrepreneurs and businesses considering locating in downtown Cleveland, particularly those considered as part of the ‘bohemian’ and ‘super-creative core’ of the ‘creative class’;

* advocating with the city administration and RTA for improvements in the accessibility and cost of public parking and public transportation available in the downtown area;

* working with downtown parking facility operators to create discount or initial reduced cost lease opportunities for businesses choosing to locate in downtown Cleveland;

* working with commercial brokers and building owners to develop comparative analysis of office space cost and amenities to use in marketing campaign and approaches to individual business owners;

* developing an individualized approach to businesses through linkage with the DCA Business Support Center.

Survey Methodology

The Downtown Cleveland Alliance contracted with the Baldwin-Wallace College Community Research Institute (CRI) to conduct a survey of Northeast Ohio residents to determine perceptions about the quality of life in downtown Cleveland, and to seek additional information from business owners and company relocation managers concerning perceptions about the desirability of downtown Cleveland as a business location.

The survey used a stratified randomized database provided by GoLeads, Inc., representing households with residents between the ages of 21 – 60, and with a minimum household income of $50,000/year. Some households with older residents were included if these met the income requirement. The database included 12,000 phone numbers, as well as street addresses, names, income and age data. The database was organized alphabetically by residential community. Survey callers ensured that all communities were equally distributed in the survey by calling every third number on the lists, and then cycling back to call every second number. To complete the target of 600 completed surveys, approximately 10,000 households were called.

The survey was conducted during the period of February 28th – March 16th, 2011, with calls made during the hours of 5:30 p.m. – 9:00 p.m. on Monday – Thursday evenings. A total of eleven nights were used during the calling period. The survey was conducted by students from Baldwin-Wallace College, who were trained and supervised by the CRI Director, Tom Sutton. 613 individuals responded to the survey, with 600 completing all parts of the survey, for a margin of error of ±4% at the 95% confidence level.

The survey question responses are reported in four parts. The first part are a series of questions designed to measure what respondents consider to be important ‘quality of life’ factors, followed by questions about their awareness of changes occurring in downtown Cleveland. Six questions ask about the following quality of life factors: restaurant mix, retail shopping availability, access to entertainment, having a ‘walkable’ city, accessible public transportation, and good K-12 educational opportunities. Eight questions are then asked about current and planned improvements to downtown Cleveland, such as the Medical Mart/Convention Center, development in the East Bank of the Flats, and plans for enhancing outdoor space.
The second part of the survey asks all respondents about their awareness of the Downtown Cleveland Alliance and its services, such as the business development center. There are also questions concerning respondents’ consumption preferences for radio, television, and print news media.

The third part of the survey identifies respondents who own or are considering starting a business, or who are involved in company management decisions concerning relocation. This subgroup of 137 respondents received a separate set of questions asking about their business type, number of employees, and annual revenue. These respondents were then asked about plans for business expansion and relocation. A set of six questions were posed asking respondents to rank order factors they might consider in selecting a new location for their business (e.g., rental cost, parking access, commute time for employees.) This section concluded with five questions concerning perceptions of downtown Cleveland as a desirable business location.

The final part of the survey consists of demographic questions, asking respondents to identify their age, gender, household income, race/ethnicity, community of work and of residence (zip code was also requested as a supplemental record), and family status. A total of 32 questions were asked of all respondents participating in the survey, with an additional 11 questions asked of individuals who identified themselves as current/potential business owners or relocation managers. Each survey took an average of twelve minutes to complete.

Survey Results

Part I: Quality of Life Factors and Awareness of Downtown Improvements

Section A: Respondent perceptions about importance of quality of life factors

It is clear from the data presented in Figures 1 – 6 that respondents place a strong value on each of the six 'quality of life' criteria. Respondents answering *'very important to me'* or *'important to me'* were the clear majority in all six questions. Combining these two response options, the survey found the highest priority for 'access to entertainment' and 'having a walkable city,' tied at 86%. The next highest priority was 'easy access to public transportation' at 69%, followed by 'good mix of affordable and high end restaurants' at 67%. 'Availability of retail shopping' was considered a priority for 58% of respondents, while 'good K-12 educational opportunities' was a priority for 56% of respondents.

Respondents varied in the degree to which they perceived these factors as *'not important to me, but important to others.'* 'Availability of retail shopping' had the highest response in this category with 30%. A similar response level occurred for the value of 'easily accessible public transportation' (27%) and 'having good K-12 education opportunities close to residence' (26%). 'Good mix of affordable and high end restaurants' followed with 22%. The lowest ratings for this category were 'having a walkable city' (11%) and 'access to entertainment' (10%), reflecting the very high value placed on these as important to the respondents.

Figure 1

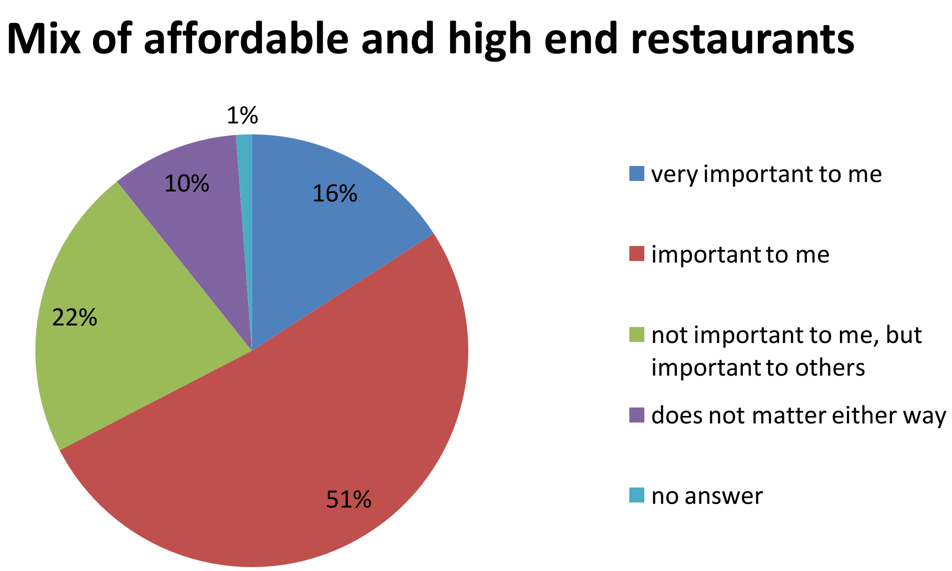


Figure 2

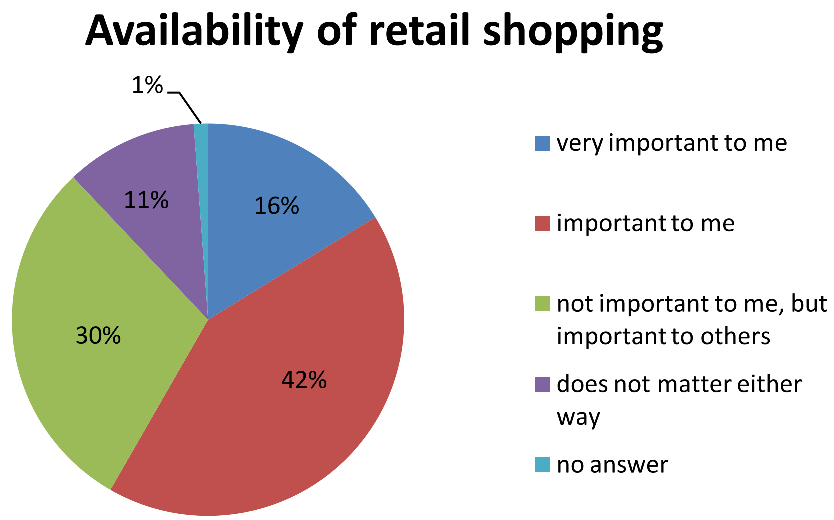


Figure 3

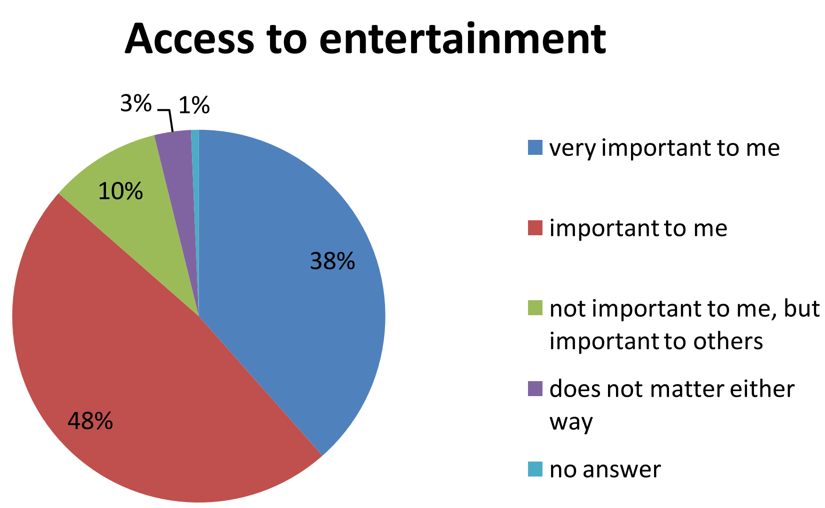


Figure 4

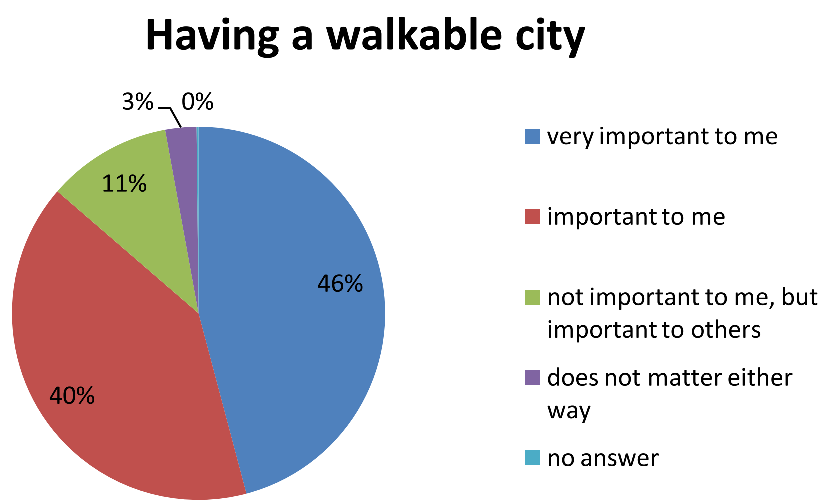


Figure 5

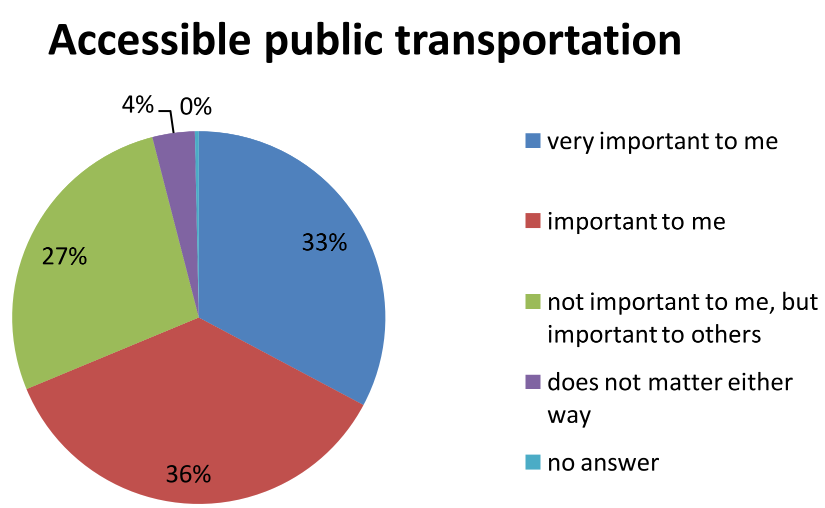
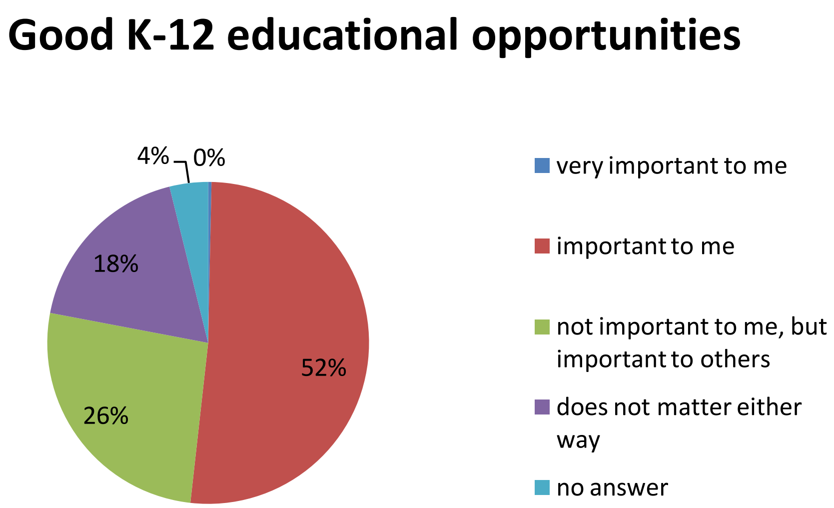


Figure 6



Section B: Respondent awareness of plans for downtown Cleveland improvements

Respondents were asked eight questions about their familiarity with planned, current, or recently completed improvements to downtown Cleveland. The first three items (Figures 7-9) had the highest levels of familiarity. 55% were familiar with the Euclid Avenue Healthline connecting downtown with University Circle. 58% were familiar with the recent start of the Medical Mart/Convention Center project. The highest level of familiarity at 63% was with the new casino planned for the old Higbees department store building on Public Square.

Familiarity with the remaining five items dropped steadily, from 44% familiarity with the development of the East Bank of the Flats (22% did not know about this), to a low of 10% who were familiar with new public, private, and charter school options within a ten minute drive of downtown Cleveland (75% did not know about new school options). 33% were familiar with improvements to the Theater District (e.g., moving the Cleveland Playhouse to the Hanna Theater), while 32% were familiar with plans for restoration of Euclid Avenue. Only 21% were familiar with the 'outdoor space master plan' for downtown Cleveland (58% did not know about the plan).

Figure 7

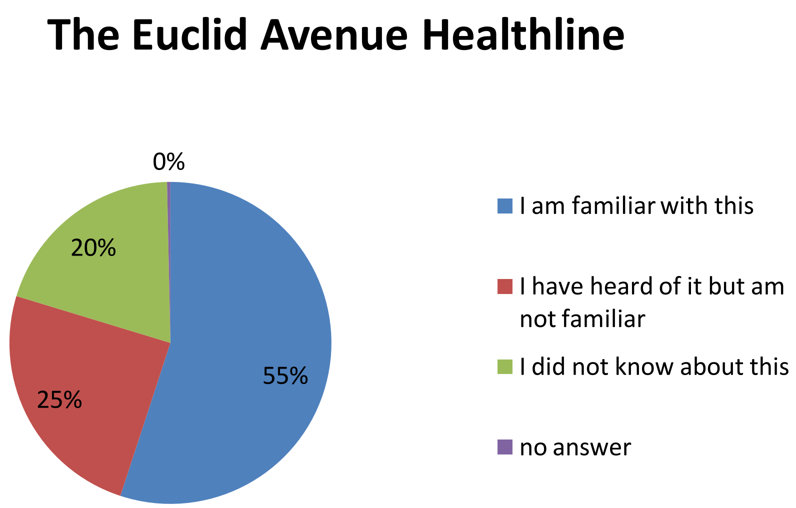


Figure 8

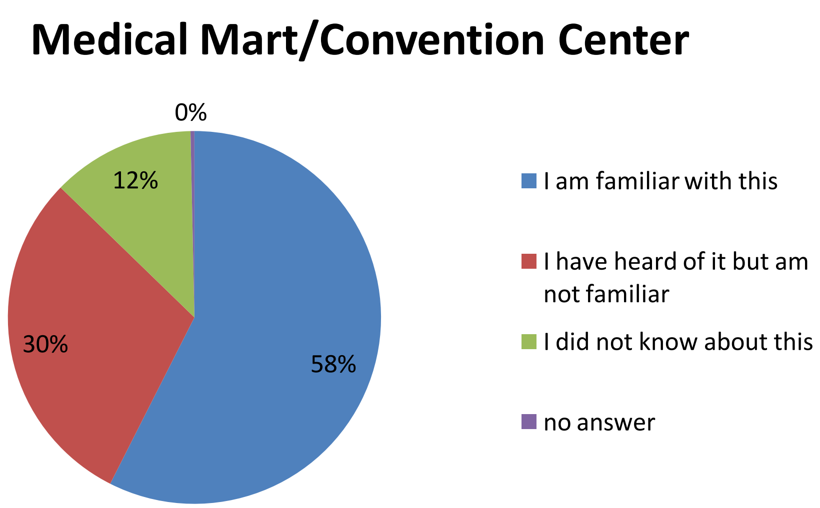


Figure 9

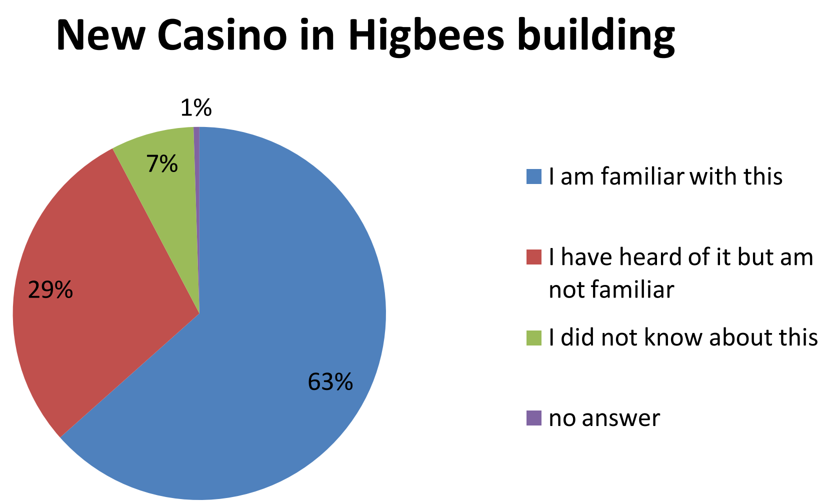


Figure 10

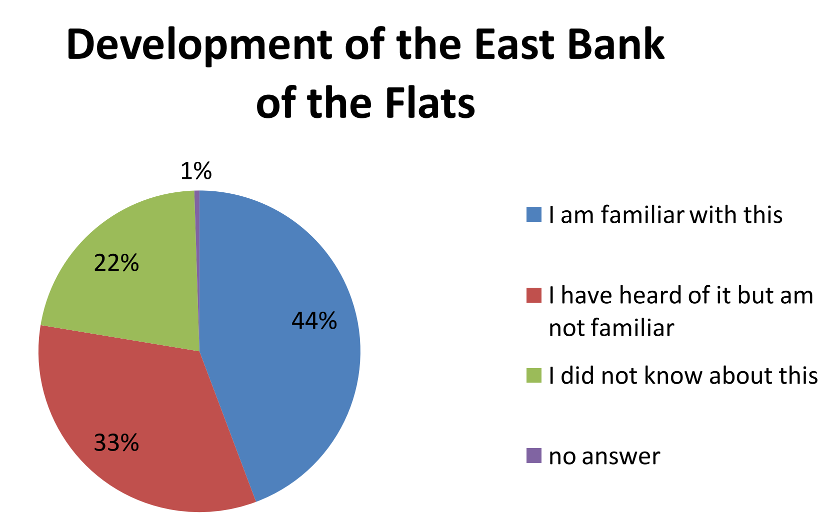


Figure 11

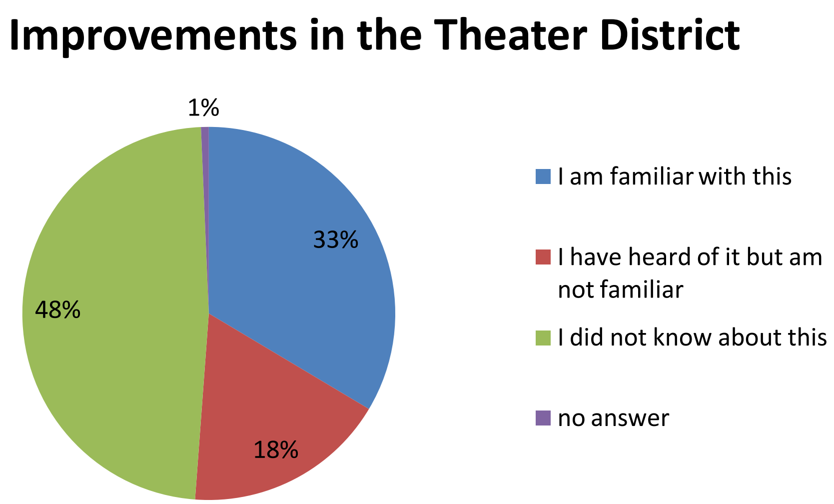


Figure 12

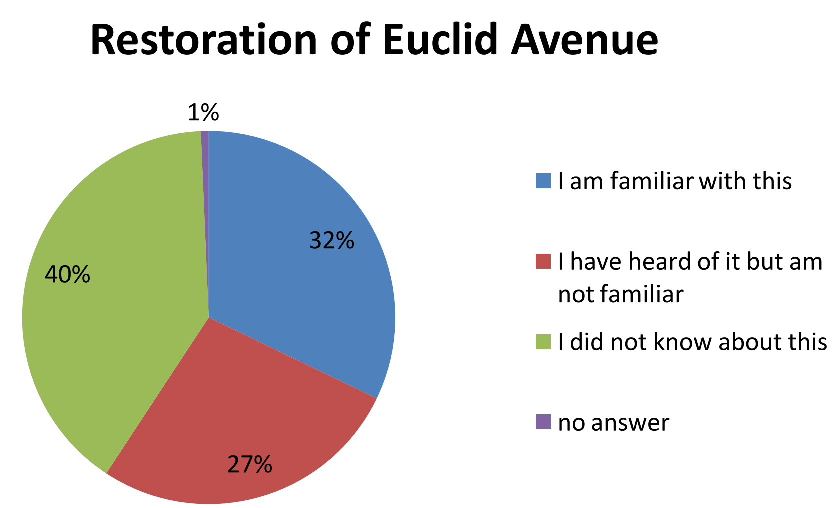
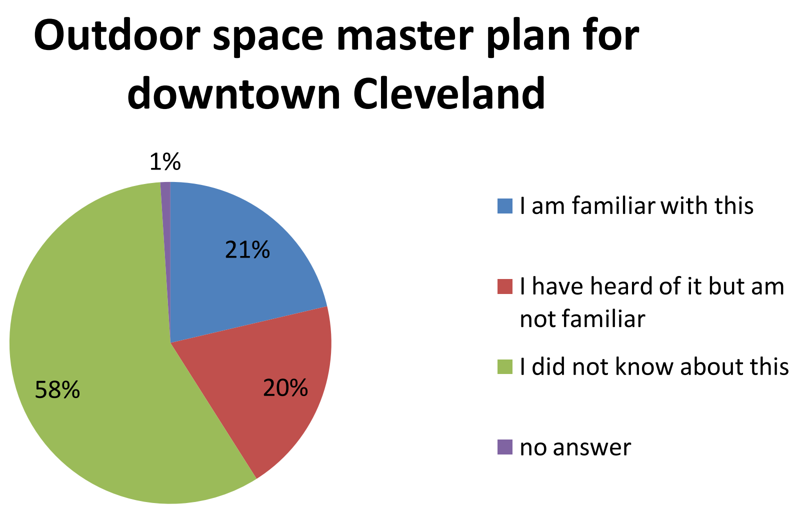


Figure 13



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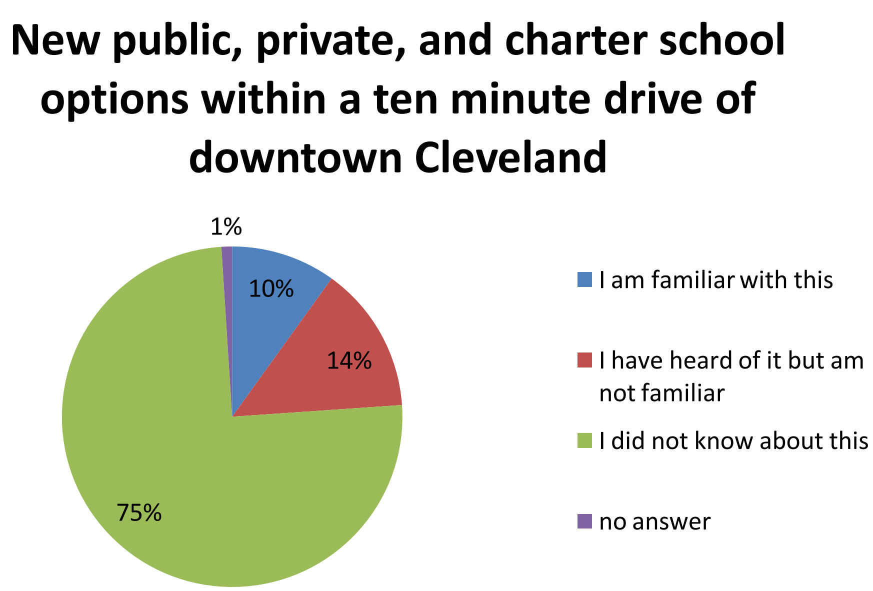


Part II: Respondent awareness of the Downtown Cleveland Alliance

Section A: Awareness of DCA services

Respondents were asked a series of questions about their awareness of the Downtown Cleveland Alliance and its services related to business support. Table 1 presents information concerning awareness about the DCA and its business development center.

Table 1: Awareness of Downtown Cleveland Alliance and its services

Question	Yes	No	Possibly	No answer
Have you recently heard of or read about companies that have moved into or expanded Downtown?	20.3%	78.5%	***	1.2%
If your company had access to a team that could help it understand available Downtown location options, public incentives, and statistics needed to make the best relocation decision, would that be of interest?	40.1%	35.9%	12.8%	11.2%
Are you aware that there is a business development center devoted to helping companies get the information and statistics they need to fully understand the options that a Downtown location would provide your company?	28.3%	63.3%	***	8.4%
Have you heard about the Downtown Cleveland Alliance?	49.1%	49.7%	***	1.2%

note: percentages do not all total 100% along rows due to rounding.

The data indicates that half of the respondents have heard about the Downtown Cleveland Alliance. A positive sign for the role of DCA in business development and relocation are the 60% of respondents who believe that assistance with information about downtown Cleveland as a business location would or might be of interest. Given the relatively recent start-up of the DCA business development center, the 28.3% awareness figure among the general public in Northeast Ohio is a good start to build on for future awareness and outreach.

Figure 15

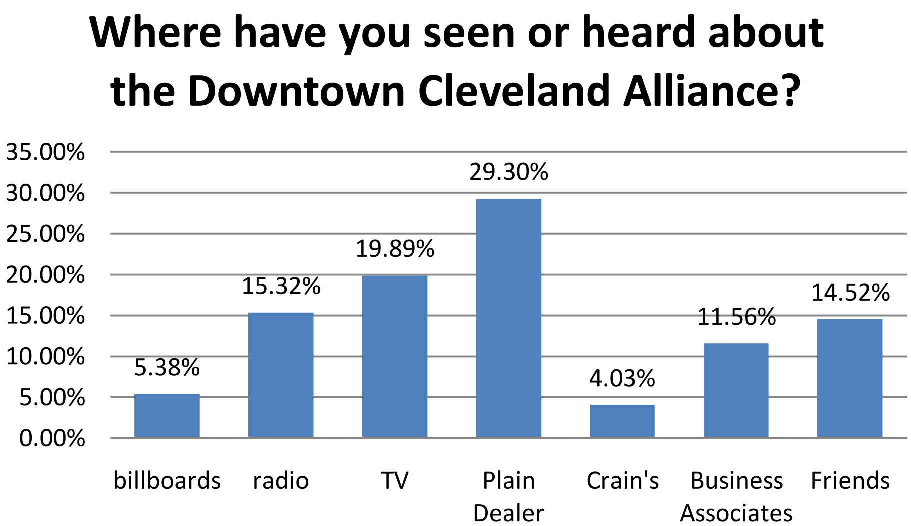


Figure 15 shows the sources of information about the DCA for respondents (who were asked to list all sources of information.) The results indicate that the Plain Dealer has been the most effective vehicle for developing awareness of the Downtown Cleveland Alliance. Despite there not being any formal television advertising campaign by the DCA, it is interesting to see that almost 20% of respondents identified TV as a source of information about the organization. This may be due to news stories about the DCA, which also likely accounts for some of the awareness gained through the Plain Dealer. Radio is a reliable source at 15.3%, and should be included in public awareness campaigns, particularly given its relative low cost compared to audience reach. Networking is clearly important, given that between 11.5% and 14.5% of respondents cited business associates and/or friends as sources of information about the DCA.

Section B: Respondent media usage preferences

The survey included three questions concerning respondent radio, TV, and newspaper preferences, with the last two specifically asking about these media as news sources.

Figure 16: What radio stations do you regularly listen to?

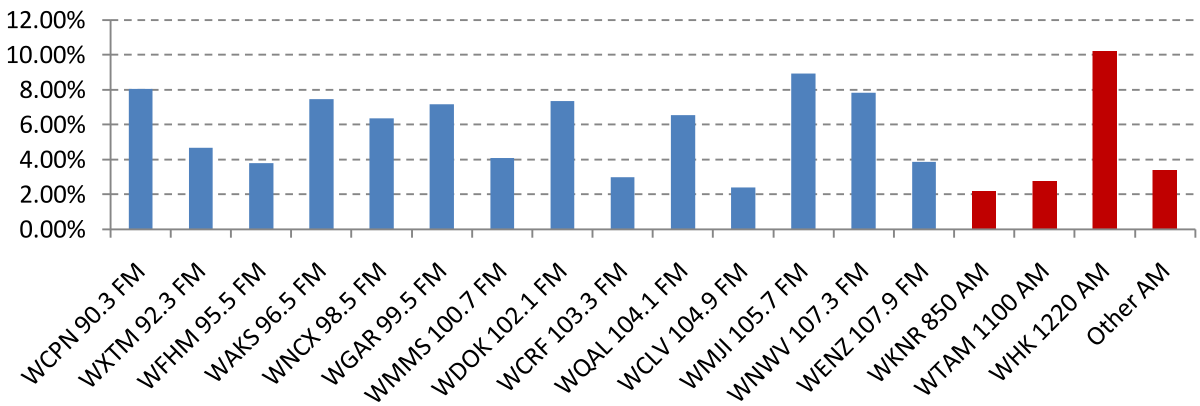
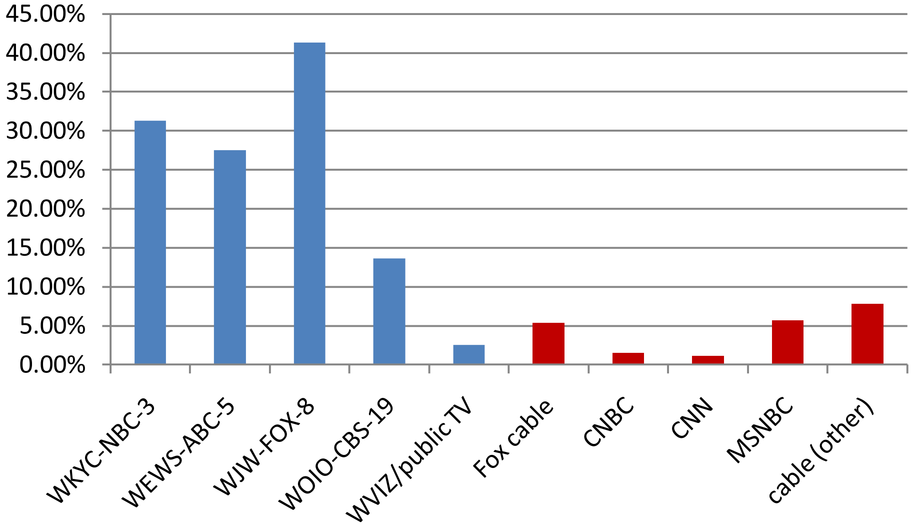


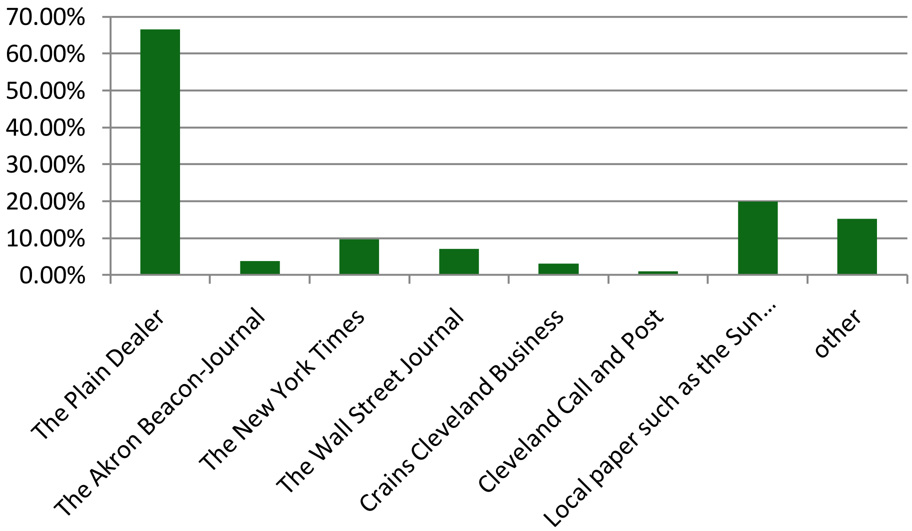
Figure 16 shows that the most popular radio station is WHK 1220 AM, with 10.2% of the audience, followed by WMJI 105.7 FM at 8.9%, and WCPN 90.3 FM (public radio) at 8%. These radio results reflect the middle-age dominance of the respondent sample (57% are between the ages of 40-59).

Figure 17: From which TV station do you get your news?



The middle-age bracket continues to show its influence in TV preferences, with the most popular station being WJW Fox 8 at 41.3%, followed by WKYC-NBC-3 at 31.3%, and WEWS-ABC-5 at 27.5%, and WOIO-CBS-19 trailing with 13.7% of the respondents' attention. This likely reflects the preference for the 10 pm newscast offered only by Fox 8. Interestingly, the cable news stations fall far below the network stations. 'Other cable' leads with 7.8%, 6 points below last place Channel 19. MSNBC (5.7%) and Fox cable (5.3%) are tied, while CNBC and CNN each come in below 2%.

Figure 18: Which of the following newspapers do you read on a regular basis (at least once/week)?



The Plain Dealer still dominates as the preferred print news source, which is not surprising given its having the largest circulation in Ohio and the dominance of Cuyahoga County residents in the sample (67.7% - see appendix for detail). The sample includes a sophisticated segment of news consumers, with 9.7% listing the New York Times, and 7.2% listing the Wall Street Journal as regularly read papers. Local papers such as the Sun News have a good following at 20%.

Part III: Questions for entrepreneurs and business managers

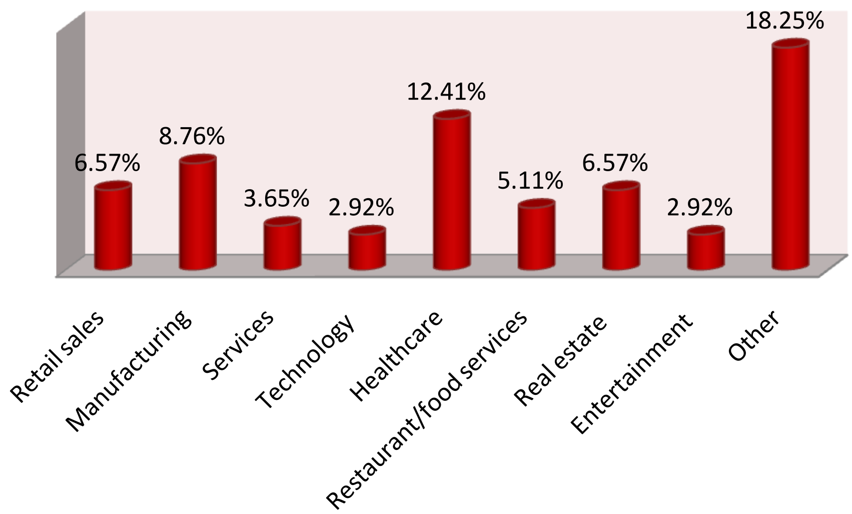
The survey sought to identify a subgroup within the sample of business owners, entrepreneurs and managers to ask questions concerning the desirability of downtown Cleveland as a potential location for their business.

All respondents were asked whether they owned a business, were thinking about starting a business, or were involved in management relocation decisions for their company. Of the 600 respondents, 109 (18.17%) said that they either owned a business or were thinking about starting a business. 28 (4.67%) said they were involved in making relocation decisions for their company. Taken together, 137 (22.83%) of the sample were identified to ask specific questions about their business and about their perceptions of downtown Cleveland as an option for locating their enterprise.

The figures that following present responses from this subgroup to questions about their business, and about their perceptions of downtown Cleveland as a possible business location (note: these questions were asked of both business owners and managers involved in relocation decisions. All percentages are based on the proportion of responses to the subgroup sample size of 137.)

Section A: Attributes of respondent businesses

Figure 19: Which of the following categories most closely describes your business?



Not surprisingly, the largest identified category is healthcare at 12.41%, followed by manufacturing at 8.76%. Retail sales and real estate (sales, development, and/or rental) tied at 6.57% each. These categories reflect the foundation of the Northeast Ohio economy being still rooted in these sectors, as represented by entrepreneurial activity and business management. It is a bit surprising to see that technology (research and development) ties with entertainment (music, theater, and sports) at 2.92%, with 3.65% in the remaining category of services (e.g., education, legal, accounting.)

These categories reflect examples of entrepreneurs and business managers who fit the ‘creative class’ definition of the DCA business marketing campaign. The ‘creative professionals’ constitute 16.06% of the sample (services and healthcare.) The ‘super-creative core’ could be considered to include the 11.68% representing the manufacturing and technology sectors. The ‘bohemians’ include the 14.6% of the sample representing the retail, restaurant/food services, and entertainment sectors.

There were also several individual entrepreneurial activities listed under the ‘other’ category that fit these three classes. Under the category of ‘creative professionals’ there was mention of writing, advertising, graphic design, consulting services, finance, banking, and publishing. For the ‘super-creative core’ the ‘other’ category included manufacturer’s representative and a remote control business. The remaining business activities mentioned fit the ‘bohemian’ category: floral design, yard design, cosmetology, historic restoration, and calligraphy.

When analyzed based on respondent age, the sample shows that 16.7% of respondents are 30-39; 36.7% are 40-49, and 30.8% are 50-59, with the remaining 15.8% being under 30 or 60 and over.

Respondent income did not appear to be a distinctive factor in the distribution of types of businesses. The distribution of business types controlling for annual household income ranged from 9.1% of the subsample at $150,001 - $200,000/year to 27.3% at $100,001 - $150,000/year (note: the sample controlling for income was considerable smaller – 77 respondents, due to the high number who refused to respond to the income question).

Figure 20: How many full time (FTE) employees are in your business?

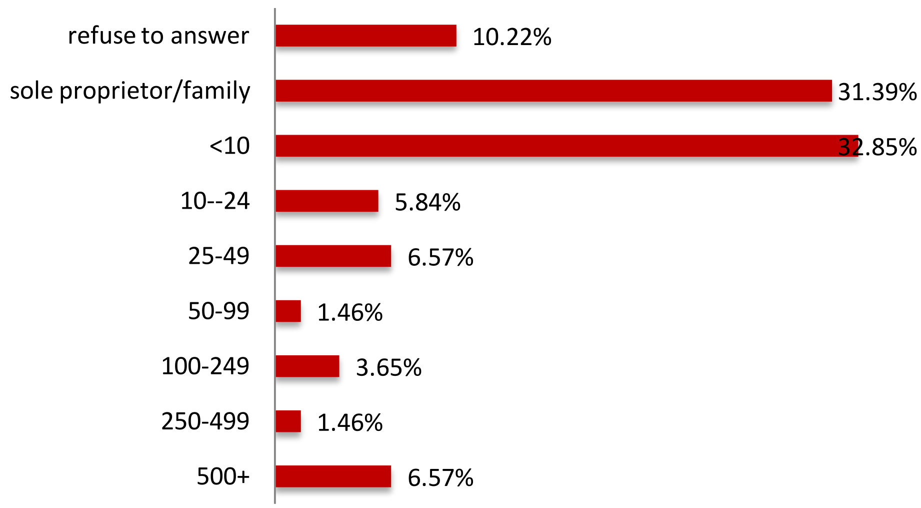
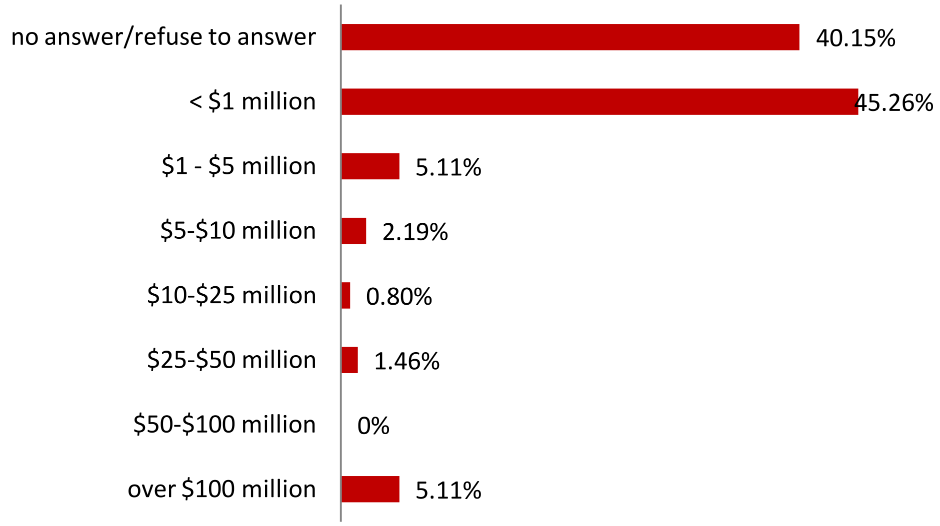


Figure 20 indicates that the majority of businesses represented are small enterprises, with 74.46% of the sample having fewer than ten employees per business. Established smaller businesses with 10-99 employees represent 13.87% of the sample, while larger business with 100 or more employees represent 11.68% of the sample. The sample hits the target audience of the 'creative class' as measured by business size, with three-quarters of the sample being smaller enterprises. This is an important group to build on for future marketing efforts.

When analyzed controlling for income, 23.6% of business owners were sole proprietors with a household income of $60,000 - $100,000/year. For business owners with less than ten employees, 15.6% had household incomes of $100,000 - $200,000/year, while 11.7% had household incomes of $40,000 - $60,000/year.

Controlling for age, the categories of 30 – 59 dominate, with 83% of businesses with less than ten employees owned by people in these age brackets. Sole proprietors tipped to an older group, with 80% of owners in this category being in the age brackets of 40 – 65, and 17% being in the 30-39 age bracket.

Figure 21: What is your approximate annual revenue?



Business owners and managers are clearly reluctant to review revenue information about the businesses, indicated by the 40.15% who did not answer the question. The dominance of small businesses found in Figure 20 is supported by the dominance of the lowest revenue category, with 45.26% of respondents indicating annual business revenue of less than $1 million. When analyzed controlling for household income, there is no discernable pattern; all income levels are fairly equally represented in this group. Regarding age, the range of 40-59 dominates in all categories. 63.8% of owners of businesses with less than $1 million in annual revenue fall into this age range, as does 90% of owners of businesses in the combined other annual revenue categories.

Section B: Business expansion and relocation - plans and influential factors

The subgroup was asked about their plans for relocating and/or expanding their business. Table 2 presents the results:

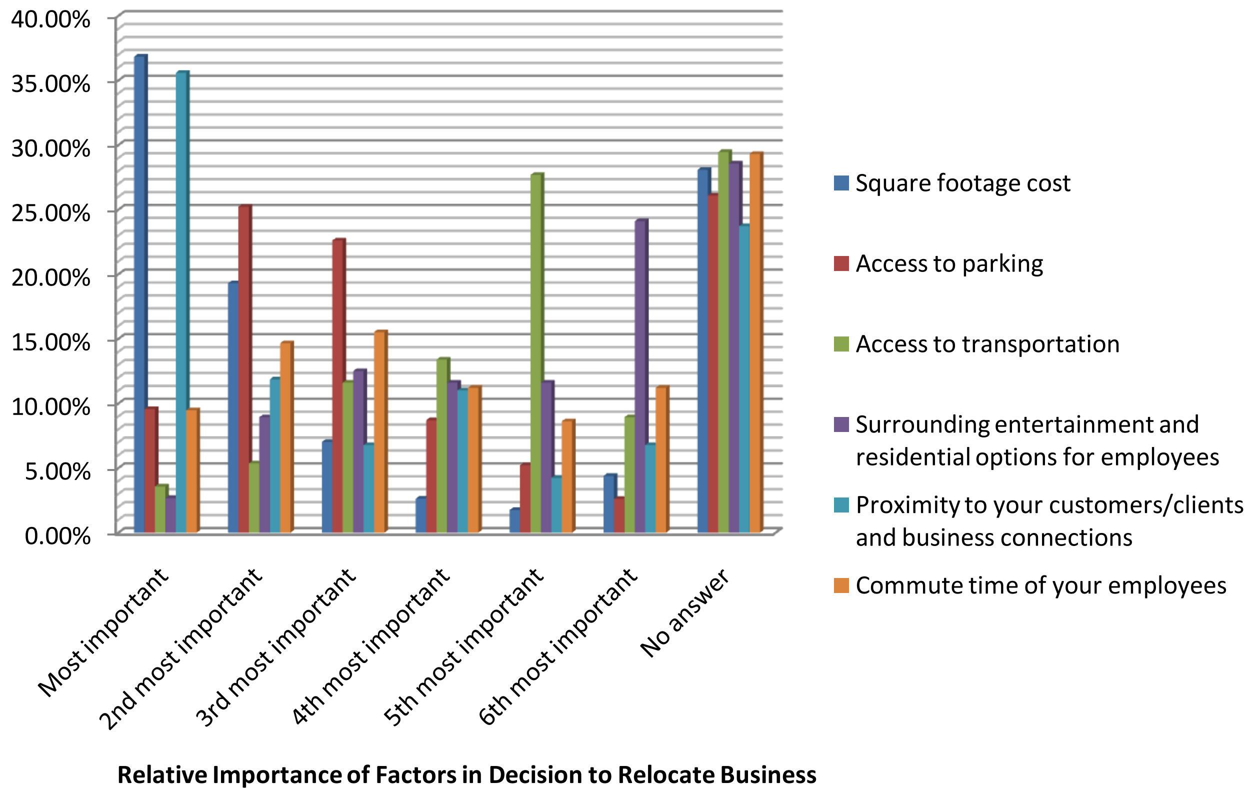
Table 2: Business expansion and relocation plans

Question	Yes	No	Uncertain	Refused to answer
Does your business have plans to expand in the next two years?	40.9%	32.1%	17.5%	2.9%
Is your business considering a move to new space in the next two years?	15.3%	59.8%	13.1%	1.5%

note: percentages across rows do not always add up to 100% due to rounding.

A healthy 40.9% of business owners and managers expect to expand in the next two years. However, a much smaller cohort of 15.3% is considering relocation. Based on these findings, it will be important for downtown Cleveland marketing efforts to target individual businesses with a tailored message designed to address their primary needs, as indicated in the results of the Figure 22 below.

Figure 22: Rank the following influences (in order of importance) in how they affect your decision to select a new location



Businesses considering relocation rate the cost of space (36.8% consider most important) and proximity to customers, clients, and business connections (35.6%) as the most important criteria. The leading factors for 'second most important' ranking are access to parking (25.2%) and commute time of employees (14.7%). Taken together, these results indicate that business owners place a very high value on accessibility for customers, clients, and employees.

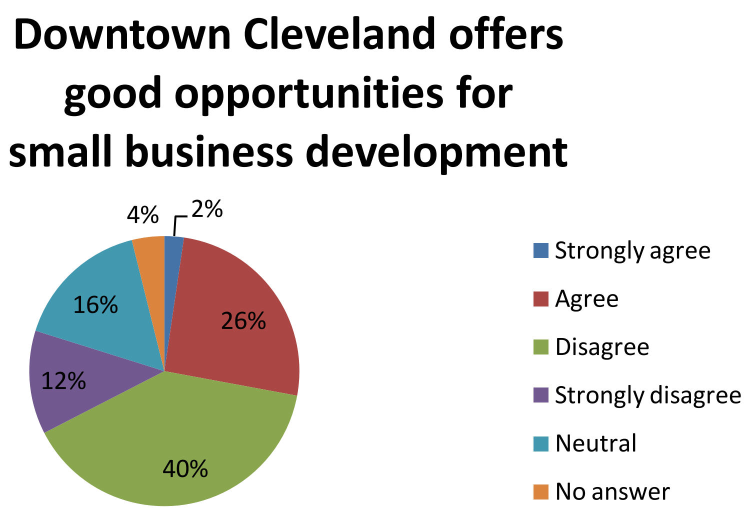
In contrast to the high ranking of entertainment in the overall survey response reported earlier, business owners rank entertainment and residential options for employees as least important (24.1%). Public transportation is also not highly rated, coming in fifth in importance at 27.7%.

Based on these results, marketing efforts designed to encourage businesses to locate in downtown Cleveland should concentrate on how this will establish and/or improve accessibility to clients and customers and enhance business networking opportunities. Focus on affordability of office space, ease of commute time and provision of accessible parking are also very important criteria for business owners when considering a location for their enterprise.

Section C: Perceptions of downtown Cleveland as a potential business location

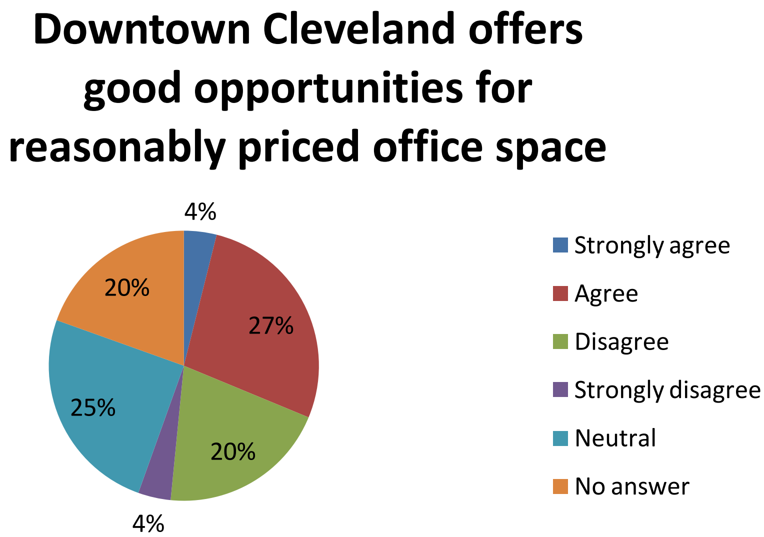
Four additional questions were asked of the 137 business owners and managers in this subgroup of the sample concerning their perceptions of downtown Cleveland as a place to do business. The results show a paradox when compared to the previous data regarding ranking of important factors in deciding to locate a business. Factors considered most important received low approval ratings, while less important factors were ranked higher. Figures 23 – 26 provide detail below.

Figure 23



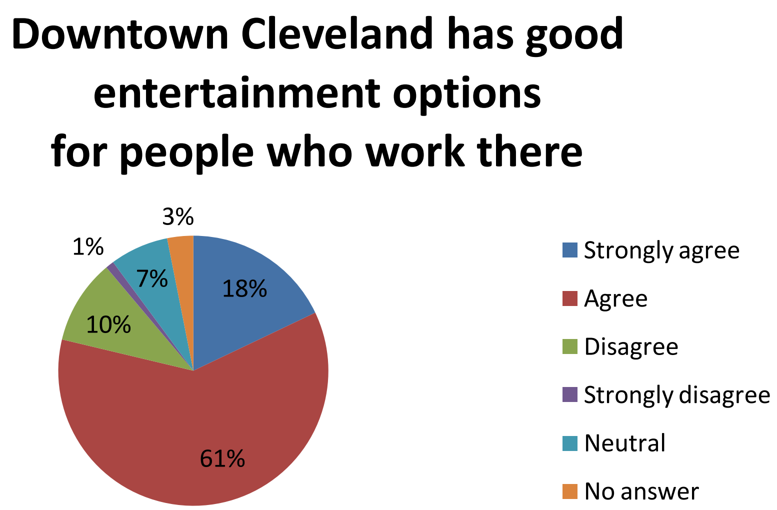
Business owners and managers do not rate downtown Cleveland highly as a place for small business development. While 28% said they 'strongly agree' or agree' with the statement, 'Downtown Cleveland offers good opportunities for small business development,' 52% said they 'disagree' or 'strongly disagree.' Marketing downtown Cleveland as a place for new business development clearly faces a challenge based on these results.

Figure 24



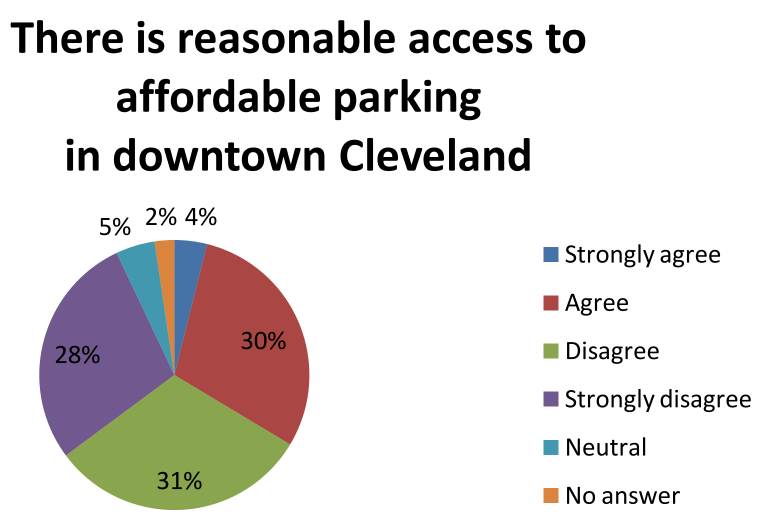
The survey sample shows mixed results concerning perceptions about the cost of office space in downtown Cleveland. 31% of respondents agreed with the statement that 'Downtown Cleveland offers good opportunities for reasonably priced office space,' while 24% disagreed. Another quarter of respondents indicated they were neutral about the question, while 20% did not answer. These results show there are opportunities to shape a positive message about the availability of reasonably priced office space in downtown Cleveland. A factor influencing these results may also be that respondents do not have a comparative framework with which to make a judgment. They may or may not have known the cost of space in their business, and likely are not specifically aware of the cost of space in downtown Cleveland. Providing specific information comparing rental rates and amenities would be an important component of a marketing campaign attempting to attract businesses and entrepreneurs to downtown Cleveland.

Figure 25



The factor considered least important in Figure 22, access to entertainment options, received the highest ranking in questions about perceptions of Cleveland. 79% of business owners and managers said they 'strongly agree' or 'agree' with the statement, 'Downtown Cleveland has good entertainment options for people who work there.'

Figure 26



Perceptions about accessible, affordable parking in downtown Cleveland continue to be negative. 34% of respondents agreed with the statement ‘There is reasonable access to affordable parking in downtown Cleveland,’ while 59% disagreed. Some of this may be driven by lack of awareness of the cost and availability of downtown parking. It is also likely influenced by the comparatively low cost of parking typically found in suburban business locations, where large lots with free parking are the norm. This is a comparative disadvantage that downtown Cleveland will never be able to compete against. However, negative perceptions about the cost and availability of parking can be offset by emphasis on other factors such as networking opportunities and the availability of entertainment options for customers, clients, and employees. It should also be remembered that higher income positions in firms in the ‘creative class’ are more likely to be able to absorb higher parking costs in exchange for the benefits of proximity to other businesses. Also, the subgroup of ‘bohemians’ includes many entrepreneurs who choose to live in or near downtown, and are more likely to rely on public transportation, walking and biking (which may help explain the 86% of respondents who ranked ‘walkable city’ as important in Figure 4).

Part IV: Respondent Demographics

The survey concluded with questions about all respondents' age, gender, household income, race/ethnicity, family status, and community of residence and work. The respondents' gender was 60% female and 40% male, an over-sampling of females that is fairly typical in telephone survey research. Figures 27 – 30 present the additional demographic data, while Table 3 presents information concerning respondents' residential and work communities. Due to the stratification of the survey sample for specific age and income brackets, the data are not compared to U.S. Census figures for the region.

Figure 27

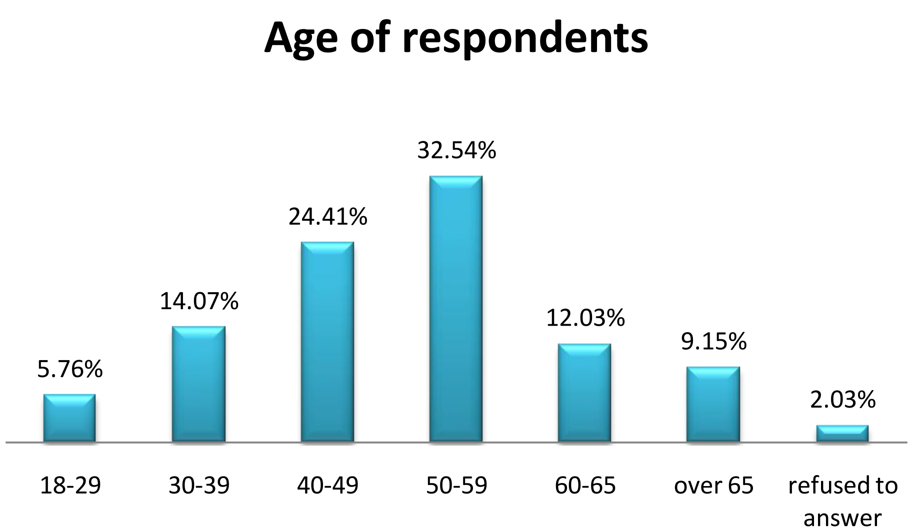


Figure 28

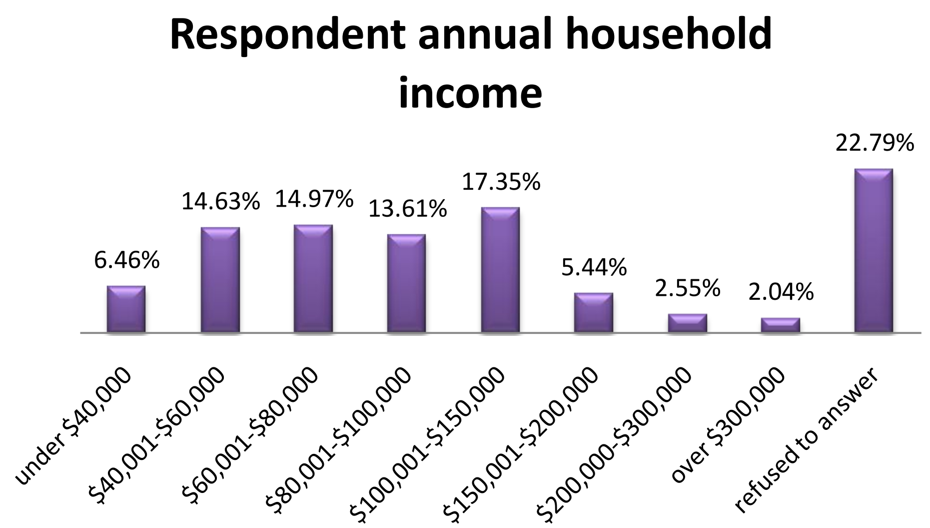


Figure 29

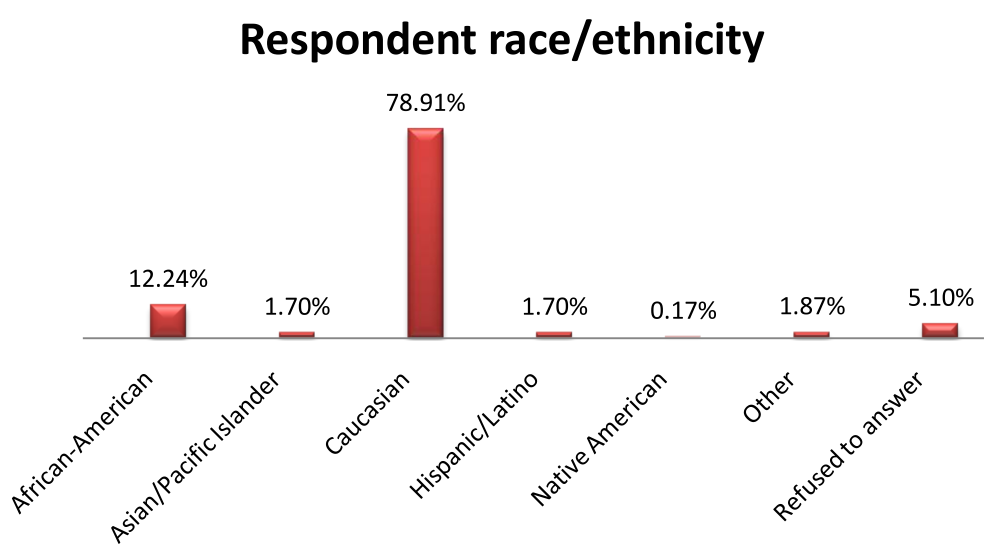


Figure 30

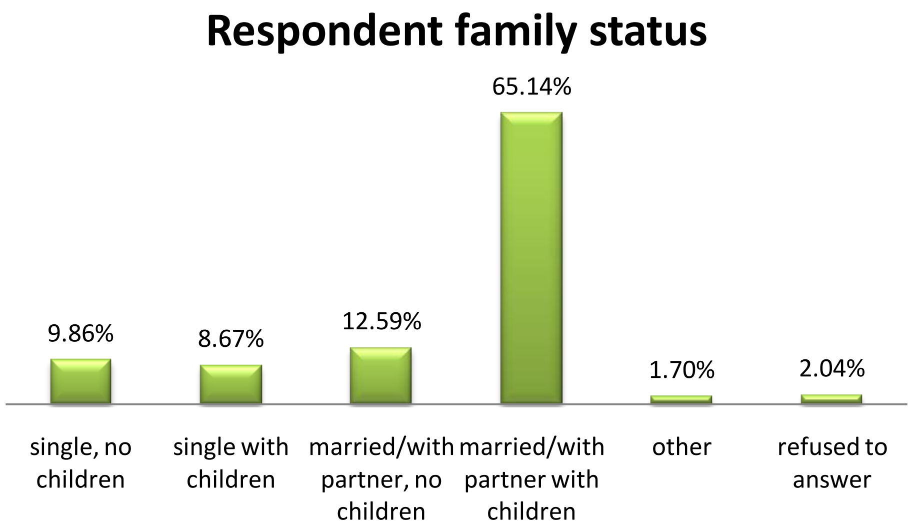


Table 3: Regional residential representation of sample, by county or major city

county/major city	# respondents	%
Canton	3	<1%
Cleveland	22	3.3%
Cuyahoga County, East	147	25.9%
Cuyahoga County, West	163	28.7%
Cuyahoga County, South	56	9.9%
Geauga County	14	2.5%
Lake County	71	12.5%
Lorain County	62	10.9%
Medina County	18	3.2%
Portage County	12	2.1%
Summit County	12	2.1%
No answer	20	3.3%

note: percentages do not add up to 100 due to rounding

The sample represents a fairly well dispersed group of respondents across the Elyria-Mentor-northern Summit region of Northeast Ohio. The Cleveland residents were drawn only from the downtown and near west side zip codes. The zip codes for Brunswick and Medina City were included, as well as Aurora, which is in Portage County bordering Cuyahoga and Geauga Counties. Most of the Lake County residents are from Mentor and the border communities of Willoughby and Willoughby Hills. A detailed breakdown of all communities represented in the sample is provided in the Appendix. The data includes responses concerning identified communities of residence and work.

Figure 31: Household income, controlling for family status

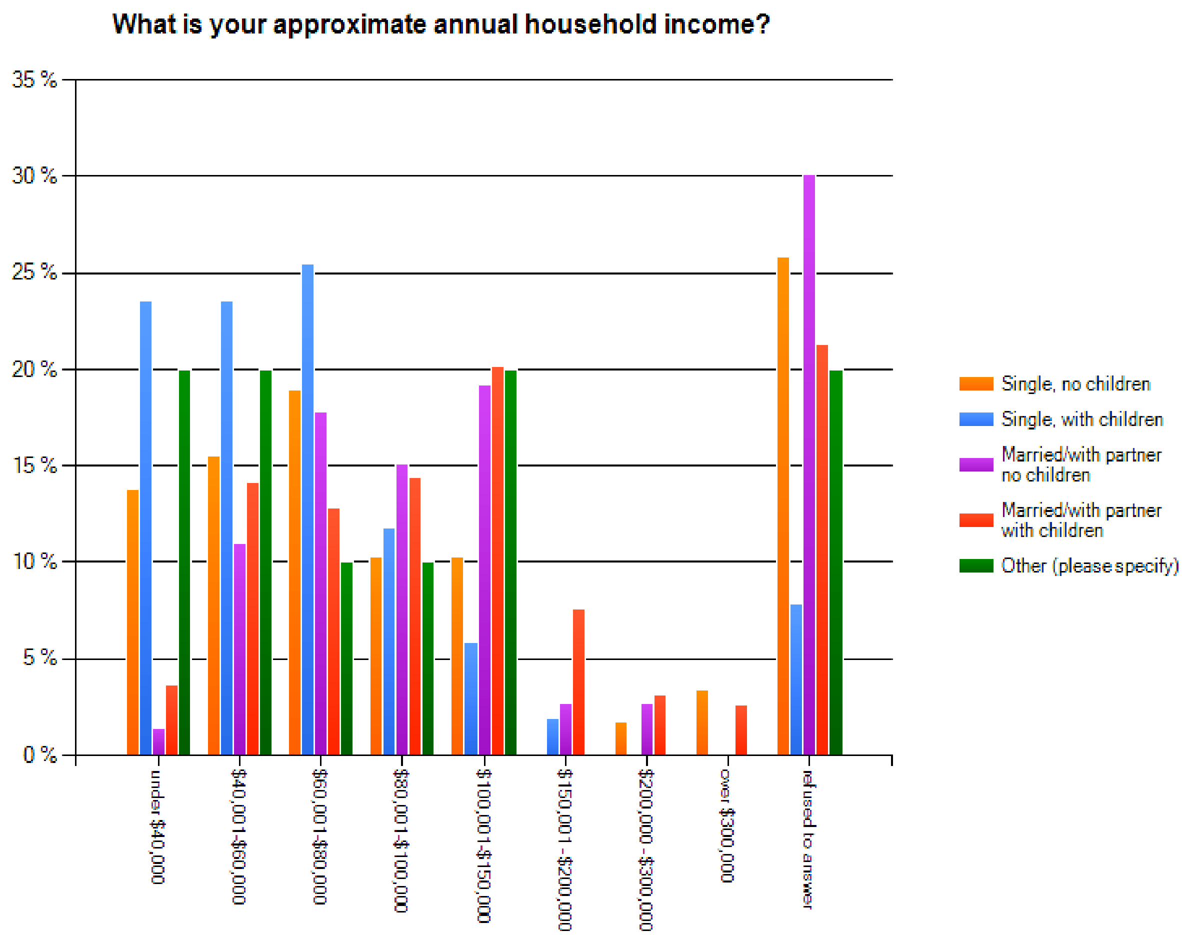
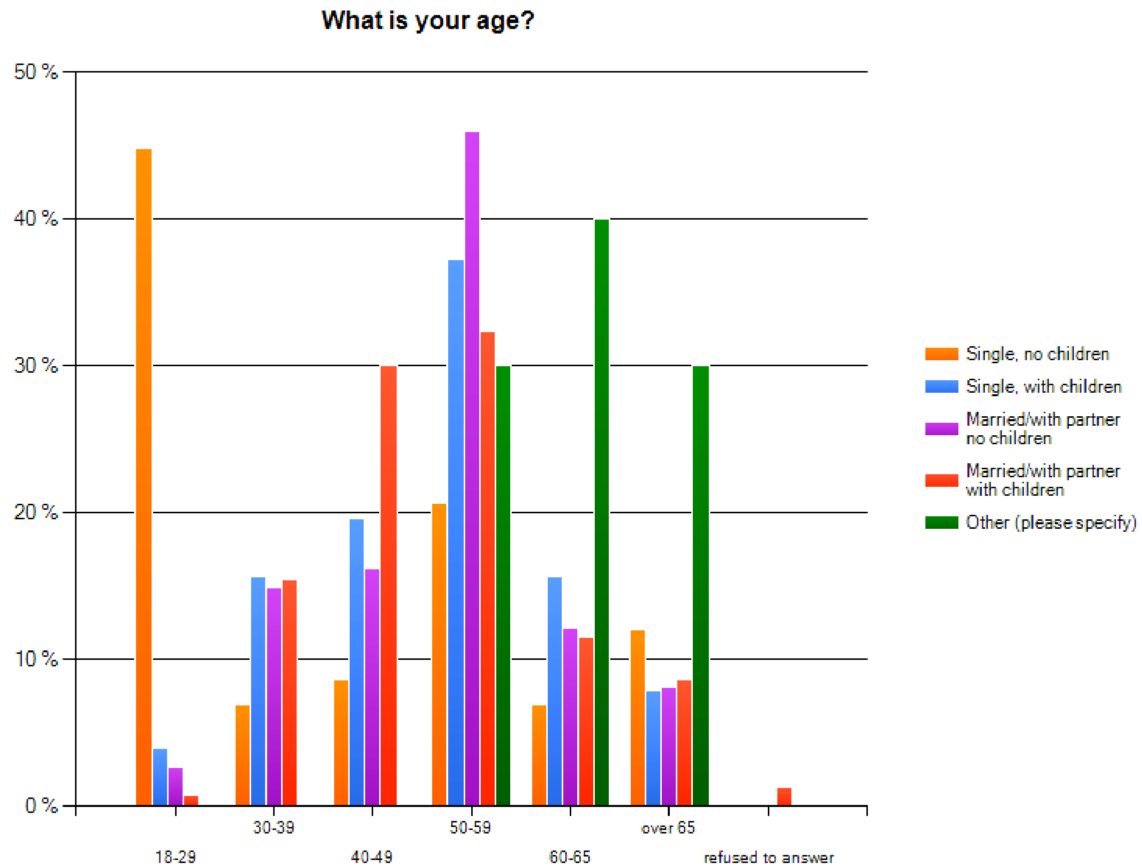


Figure 31 indicates that single parents with children are more common in the income brackets of <$40,000 - $80,000/year (71%), while married couples with children are more dominant in the $80,000 - $200,000/year income brackets (61%). The large percentage of married couples with children (65% of the sample) are distributed fairly evenly across the income spectrum, ranging from 11% for income above $150,000/year, to 29% for families with incomes of $100,000 - $150,000/year.

Figure 32: Age, controlling for family status



The data concentrates in the 50-59 age bracket, representing 37% of the sample. Respondents with a spouse or partner and with children predominate at 66% of the sample, representing the majority in all age categories except 18-29.

Appendix

Respondent Communities of Residence and Work

City	Residence	Work	City	Residence	Work
Akron	4	7	Lagrange	3	2
Amherst	5	1	Lakewood	11	7
Aurora	0	1	Lorain Co.	0	3
Avon	7	6	Lorain City	3	4
Avon Lake	5	2	Lyndhurst	6	1
Bainbridge	1	0	Maple Heights	5	2
Bay Village	14	4	Mayfield	2	2
Beachwood	11	9	Mayfield Heights	1	3
Bedford	4	0	Mayfield Village	0	3
Bedford Heights	3	0	Medina City	2	5
Bentleyville	1	0	Mentor	29	12
Berea	13	7	Mentor-on-the-Lake	2	0
Brecksville	6	4	Middleburg Heights	16	9
Broadview Heights	4	2	Monroe Falls	0	1
Brooklyn	0	6	Newbury	0	2
Brookpark	6	5	Northfield	0	1
Brunswick	11	4	North Olmsted	26	8
Canton	0	3	North Ridgeville	16	3
Chagrin Falls	4	4	North Royalton	21	6
Chardon	0	2	Oakwood	2	0
Chesterland	6	1	Oberlin	3	3
Cleveland	22	130	Olmsted Twnshp	0	1
Cleveland Heights	20	11	Orange	0	1
Columbia Station	3	1	Painesville	0	2
Concord	1	0	Parma	29	11
Cuyahoga Falls	3	2	Parma Heights	6	0
Cuyahoga Heights	1	0	Peninsula	1	1
Eastlake	4	1	Pepper Pike	3	4
Elyria	7	8	Richfield	0	2
Euclid	17	11	Richmond Heights	5	4
Fairlawn	2	2	Rocky River	11	6
Fairview Park	17	9	Russell	2	0
Garfield Heights	3	6	Seven Hills	6	2
Gates Mills	1	1	Shaker Heights	20	8
Geauga	0	2	Sheffield Lake	6	1
Grafton	4	0	Solon	17	10
Highland Heights	4	1	South Euclid	11	4
Highland Hills	0	1	Strongsville	22	12
Hinckley	1	1	Stowe	10	5
Hudson	0	1	Streetsboro	0	1
Hunting Valley	1	0	Twinsburg	0	2
Independence	8	6	University Heights	5	2
Kirtland	6	4			

City	Residence	Work	Work status	Number
Valley City	4	1	Work throughout NE Ohio	14
Valley View	0	2	Retired	54
Walton Hills	3	0	Do not work	15
Warrensville Heights	2	3	Unemployed	9
Westlake	13	9	No answer	13
Wickliffe	8	5		
Willoughby	15	6		
Willoughby Hills	4	1		
Willowick	2	0		
Woodmere	2	1		

note: numbers for residence and work for each community are not for the same individuals; these are total counts for each community.

<u>Residential communities with highest numbers:</u>
Mentor: 29
Parma: 29
North Olmsted: 26
Cleveland: 22
Strongsville: 22
North Royalton: 21
Cleveland Heights: 20
Shaker Heights: 20

<u>Work communities with highest numbers:</u>
Cleveland: 130
Mentor: 12
Strongsville: 12
Cleveland Heights: 11
Euclid: 11
Parma: 11
Solon: 10

<u>Total number of persons represented in communities of residence or work:</u> 580 (20 missing responses)
Total number of communities: 114

Total number of persons represented in each region/county:
Canton: 3 (<1%)
Cleveland: 22 (3.3%)
Cuyahoga County, East: 147 (25.9%)
Cuyahoga County, West: 163 (28.7%)
Cuyahoga County, South: 56 (9.9%)
Geauga County: 14 (2.5%)
Lake County: 71 (12.5%)
Lorain County: 62 (10.9%)
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