



## Ohio Chamber of Commerce Research Foundation

2017 First Quarter Survey – Unweighted Survey Data

April 30, 2017

Clout Research conducted a survey of business leaders across the state of Ohio to determine the state of their companies and the Ohio economy. The survey was conducted online and over the telephone April 13 – 29, 2017, and included 405 business leaders statewide. The survey included 286 respondents online and 119 on the telephone. It carries a confidence interval of 95% and a margin of error of +/- 4.85 percentage points.

Question # 1. Thinking about the overall economic climate here in Ohio, would you say the economic climate is excellent, good, only fair or poor?

Economic Climate

|                        | Frequency | Percent | Valid Percent | Cumulative Percent |
|------------------------|-----------|---------|---------------|--------------------|
| <b>EXCELLENT</b>       | 21        | 5.2     | 5.2           | 5.2                |
| <b>GOOD</b>            | 238       | 58.8    | 58.8          | 64.0               |
| <b>Valid ONLY FAIR</b> | 128       | 31.6    | 31.6          | 95.6               |
| <b>POOR</b>            | 18        | 4.4     | 4.4           | 100.0              |
| <b>Total</b>           | 405       | 100.0   | 100.0         |                    |

Question # 2. On a scale of 1 to 10, with 1 being the lowest end of the scale and 10 being the highest, how were your company's profits in the last 3 months?

1 = very low

5 = stable

10 = very high

**Q1 PROFITS – INDEX: 54.94**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 16        | 4.0     | 4.0           | 4.0                |
| 2              | 21        | 5.2     | 5.2           | 9.1                |
| 3              | 27        | 6.7     | 6.7           | 15.8               |
| 4              | 43        | 10.6    | 10.6          | 26.4               |
| 5              | 123       | 30.4    | 30.4          | 56.8               |
| <b>Valid</b> 6 | 49        | 12.1    | 12.1          | 68.9               |
| 7              | 56        | 13.8    | 13.8          | 82.7               |
| 8              | 35        | 8.6     | 8.6           | 91.4               |
| 9              | 17        | 4.2     | 4.2           | 95.6               |
| 10             | 18        | 4.4     | 4.4           | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |

Question # 3. On a scale of 1 to 10, did the number of workers at your company increase, decrease or stay the same in the last 3 months?

1 = large decrease

5 = no change

10 = large increase

**Q1 WORKFORCE – INDEX: 53.01**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 6         | 1.5     | 1.5           | 1.5                |
| 2              | 8         | 2.0     | 2.0           | 3.5                |
| 3              | 16        | 4.0     | 4.0           | 7.4                |
| 4              | 15        | 3.7     | 3.7           | 11.1               |
| 5              | 249       | 61.5    | 61.5          | 72.6               |
| <b>Valid</b> 6 | 53        | 13.1    | 13.1          | 85.7               |
| 7              | 32        | 7.9     | 7.9           | 93.6               |
| 8              | 11        | 2.7     | 2.7           | 96.3               |
| 9              | 8         | 2.0     | 2.0           | 98.3               |
| 10             | 7         | 1.7     | 1.7           | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |

Question # 4. On a scale of 1 to 10, please describe the level of capital expenditures (investments) made by your firm in the last 3 months compared to the previous quarter.

1 = large reduction      5 = stayed the same      10 = large increase

**Q1 CAP EX – INDEX: 51.21**

|       |              | Frequency | Percent | Valid Percent | Cumulative Percent |
|-------|--------------|-----------|---------|---------------|--------------------|
| Valid | 1            | 47        | 11.6    | 11.6          | 11.6               |
|       | 2            | 6         | 1.5     | 1.5           | 13.1               |
|       | 3            | 10        | 2.5     | 2.5           | 15.6               |
|       | 4            | 15        | 3.7     | 3.7           | 19.3               |
|       | 5            | 200       | 49.4    | 49.4          | 68.6               |
|       | 6            | 46        | 11.4    | 11.4          | 80.0               |
|       | 7            | 32        | 7.9     | 7.9           | 87.9               |
|       | 8            | 29        | 7.2     | 7.2           | 95.1               |
|       | 9            | 7         | 1.7     | 1.7           | 96.8               |
|       | 10           | 13        | 3.2     | 3.2           | 100.0              |
|       | <b>Total</b> | 405       | 100.0   | 100.0         |                    |

Question # 5. On a scale of 1 to 10, please indicate whether your company's overall business expenses decreased, increased or stayed the same in the first quarter of 2017, compared to the previous quarter.

1 = large decrease

5 = stayed the same

10 = large increase

**Q1 BIZ EXPENSE – INDEX: 57.78**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 8         | 2.0     | 2.0           | 2.0                |
| 2              | 6         | 1.5     | 1.5           | 3.5                |
| 3              | 11        | 2.7     | 2.7           | 6.2                |
| 4              | 21        | 5.2     | 5.2           | 11.4               |
| 5              | 160       | 39.5    | 39.5          | 50.9               |
| <b>Valid</b> 6 | 83        | 20.5    | 20.5          | 71.4               |
| 7              | 62        | 15.3    | 15.3          | 86.7               |
| 8              | 30        | 7.4     | 7.4           | 94.1               |
| 9              | 9         | 2.2     | 2.2           | 96.3               |
| 10             | 15        | 3.7     | 3.7           | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |

Question # 6. For the next several questions, please think about the next three months, considering what you anticipate will happen in quarter 2 (April, May, June).

On a scale of 1 to 10, with 1 being the lowest end of the scale and 10 being the highest, do you anticipate that your company's profits will be higher, lower or stay the same?

1 = expect much lower      5 = will stay the same      10 = expect much higher

**Q2 PROFIT OUTLOOK – INDEX: 56.40**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 3         | .7      | .7            | .7                 |
| 2              | 19        | 4.7     | 4.7           | 5.4                |
| 3              | 21        | 5.2     | 5.2           | 10.6               |
| 4              | 38        | 9.4     | 9.4           | 20.0               |
| 5              | 132       | 32.6    | 32.6          | 52.6               |
| <b>Valid</b> 6 | 76        | 18.8    | 18.8          | 71.4               |
| 7              | 57        | 14.1    | 14.1          | 85.4               |
| 8              | 34        | 8.4     | 8.4           | 93.8               |
| 9              | 9         | 2.2     | 2.2           | 96.0               |
| 10             | 16        | 4.0     | 4.0           | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |

Question # 7. On a scale of 1 to 10, do you anticipate that the number of workers at your company will be reduced, stay the same or increase in quarter 2, 2017?

1 = expect large reduction    5 = stay the same    10 = expect large increase

**Q2 WORKFORCE OUTLOOK – INDEX: 54.42**

|              | Frequency | Percent | Valid Percent | Cumulative Percent |
|--------------|-----------|---------|---------------|--------------------|
| 1            | 2         | .5      | .5            | .5                 |
| 2            | 4         | 1.0     | 1.0           | 1.5                |
| 3            | 10        | 2.5     | 2.5           | 4.0                |
| 4            | 16        | 4.0     | 4.0           | 7.9                |
| 5            | 245       | 60.5    | 60.5          | 68.4               |
| <b>Valid</b> |           |         |               |                    |
| 6            | 72        | 17.8    | 17.8          | 86.2               |
| 7            | 28        | 6.9     | 6.9           | 93.1               |
| 8            | 13        | 3.2     | 3.2           | 96.3               |
| 9            | 7         | 1.7     | 1.7           | 98.0               |
| 10           | 8         | 2.0     | 2.0           | 100.0              |
| <b>Total</b> | 405       | 100.0   | 100.0         |                    |

Question # 8. On a scale of 1 to 10, do you expect your company's capital expenditures will decrease, stay the same or increase?

1 = expect large reduction      5 = stay the same    10 = expect large increase

**Q2 CAP EX OUTLOOK – INDEX: 52.22**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 18        | 4.4     | 4.4           | 4.4                |
| 2              | 11        | 2.7     | 2.7           | 7.2                |
| 3              | 21        | 5.2     | 5.2           | 12.3               |
| 4              | 36        | 8.9     | 8.9           | 21.2               |
| 5              | 192       | 47.4    | 47.4          | 68.6               |
| <b>Valid</b> 6 | 58        | 14.3    | 14.3          | 83.0               |
| 7              | 29        | 7.2     | 7.2           | 90.1               |
| 8              | 18        | 4.4     | 4.4           | 94.6               |
| 9              | 7         | 1.7     | 1.7           | 96.3               |
| 10             | 15        | 3.7     | 3.7           | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |



Question # 9. On a scale of 1 to 10, do you anticipate that overall business expenses for your company will decrease, stay the same or increase in Q2?

1 = expect large reduction    5 = stay the same    10 = expect large increase

**Q2 BIZ EXPENSE OUTLOOK – INDEX: 57.68**

|       |    | Frequency | Percent | Valid Percent | Cumulative Percent |
|-------|----|-----------|---------|---------------|--------------------|
| Valid | 1  | 5         | 1.2     | 1.2           | 1.2                |
|       | 2  | 8         | 2.0     | 2.0           | 3.2                |
|       | 3  | 8         | 2.0     | 2.0           | 5.2                |
|       | 4  | 17        | 4.2     | 4.2           | 9.4                |
|       | 5  | 165       | 40.7    | 40.7          | 50.1               |
|       | 6  | 105       | 25.9    | 25.9          | 76.0               |
|       | 7  | 43        | 10.6    | 10.6          | 86.7               |
|       | 8  | 32        | 7.9     | 7.9           | 94.6               |
|       | 9  | 9         | 2.2     | 2.2           | 96.8               |
|       | 10 | 13        | 3.2     | 3.2           | 100.0              |
| Total |    | 405       | 100.0   | 100.0         |                    |

Question # 10. On a scale of 1 to 10, with 1 being the lowest end of the scale and 10 being the highest, how optimistic or pessimistic would you say you are about the immediate future of your business over the next quarter?

1 = very pessimistic

10 = very optimistic

**Q2 OPTIMISM – INDEX: 66.52**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 6         | 1.5     | 1.5           | 1.5                |
| 2              | 5         | 1.2     | 1.2           | 2.7                |
| 3              | 17        | 4.2     | 4.2           | 6.9                |
| 4              | 29        | 7.2     | 7.2           | 14.1               |
| 5              | 69        | 17.0    | 17.0          | 31.1               |
| <b>Valid</b> 6 | 56        | 13.8    | 13.8          | 44.9               |
| 7              | 83        | 20.5    | 20.5          | 65.4               |
| 8              | 58        | 14.3    | 14.3          | 79.8               |
| 9              | 35        | 8.6     | 8.6           | 88.4               |
| 10             | 47        | 11.6    | 11.6          | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |

Question # 12. On a scale of 1 to 10, with 1 being no concern at all and 10 being very high concern – please rate the following issues as it currently impacts your company while doing business in Ohio.

Regulatory or other interference by Federal Government:

**ISSUE - FED REG – INDEX: 61.01**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 31        | 7.7     | 7.7           | 7.7                |
| 2              | 36        | 8.9     | 8.9           | 16.5               |
| 3              | 16        | 4.0     | 4.0           | 20.5               |
| 4              | 24        | 5.9     | 5.9           | 26.4               |
| 5              | 51        | 12.6    | 12.6          | 39.0               |
| <b>Valid</b> 6 | 50        | 12.3    | 12.3          | 51.4               |
| 7              | 45        | 11.1    | 11.1          | 62.5               |
| 8              | 60        | 14.8    | 14.8          | 77.3               |
| 9              | 46        | 11.4    | 11.4          | 88.6               |
| 10             | 46        | 11.4    | 11.4          | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |

## Regulatory or other interference by State Government:

**ISSUE - STATE REG – INDEX: 59.51**

|         | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------|-----------|---------|---------------|--------------------|
| 1       | 31        | 7.7     | 7.7           | 7.7                |
| 2       | 27        | 6.7     | 6.7           | 14.3               |
| 3       | 19        | 4.7     | 4.7           | 19.0               |
| 4       | 32        | 7.9     | 7.9           | 26.9               |
| 5       | 65        | 16.0    | 16.0          | 43.0               |
| Valid 6 | 50        | 12.3    | 12.3          | 55.3               |
| 7       | 54        | 13.3    | 13.3          | 68.6               |
| 8       | 49        | 12.1    | 12.1          | 80.7               |
| 9       | 35        | 8.6     | 8.6           | 89.4               |
| 10      | 43        | 10.6    | 10.6          | 100.0              |
| Total   | 405       | 100.0   | 100.0         |                    |

## Economic Uncertainty:

**ISSUE - ECON UNCERTAINTY – INDEX: 56.99**

|         | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------|-----------|---------|---------------|--------------------|
| 1       | 17        | 4.2     | 4.2           | 4.2                |
| 2       | 29        | 7.2     | 7.2           | 11.4               |
| 3       | 23        | 5.7     | 5.7           | 17.0               |
| 4       | 28        | 6.9     | 6.9           | 24.0               |
| Valid 5 | 91        | 22.5    | 22.5          | 46.4               |
| 6       | 63        | 15.6    | 15.6          | 62.0               |
| 7       | 70        | 17.3    | 17.3          | 79.3               |
| 8       | 49        | 12.1    | 12.1          | 91.4               |
| 9       | 13        | 3.2     | 3.2           | 94.6               |
| 10      | 22        | 5.4     | 5.4           | 100.0              |

|       |     |       |       |  |
|-------|-----|-------|-------|--|
| Total | 405 | 100.0 | 100.0 |  |
|-------|-----|-------|-------|--|

## Attracting/Hiring Qualified Employees:

### ISSUE - WORKFORCE - INDEX: 59.16

|         | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------|-----------|---------|---------------|--------------------|
| 1       | 37        | 9.1     | 9.1           | 9.1                |
| 2       | 28        | 6.9     | 6.9           | 16.0               |
| 3       | 39        | 9.6     | 9.6           | 25.7               |
| 4       | 14        | 3.5     | 3.5           | 29.1               |
| 5       | 57        | 14.1    | 14.1          | 43.2               |
| Valid 6 | 43        | 10.6    | 10.6          | 53.8               |
| 7       | 51        | 12.6    | 12.6          | 66.4               |
| 8       | 52        | 12.8    | 12.8          | 79.3               |
| 9       | 26        | 6.4     | 6.4           | 85.7               |
| 10      | 58        | 14.3    | 14.3          | 100.0              |
| Total   | 405       | 100.0   | 100.0         |                    |

## Cost of Energy:

### ISSUE - ENERGY COSTS - INDEX: 49.12

|         | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------|-----------|---------|---------------|--------------------|
| 1       | 29        | 7.2     | 7.2           | 7.2                |
| 2       | 43        | 10.6    | 10.6          | 17.8               |
| 3       | 57        | 14.1    | 14.1          | 31.9               |
| 4       | 19        | 4.7     | 4.7           | 36.5               |
| 5       | 97        | 24.0    | 24.0          | 60.5               |
| Valid 6 | 68        | 16.8    | 16.8          | 77.3               |
| 7       | 38        | 9.4     | 9.4           | 86.7               |
| 8       | 29        | 7.2     | 7.2           | 93.8               |
| 9       | 10        | 2.5     | 2.5           | 96.3               |
| 10      | 15        | 3.7     | 3.7           | 100.0              |
| Total   | 405       | 100.0   | 100.0         |                    |

## Competition:

**ISSUE – COMPETITION – INDEX: 49.75**

|         | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------|-----------|---------|---------------|--------------------|
| 1       | 53        | 13.1    | 13.1          | 13.1               |
| 2       | 31        | 7.7     | 7.7           | 20.7               |
| 3       | 43        | 10.6    | 10.6          | 31.4               |
| 4       | 28        | 6.9     | 6.9           | 38.3               |
| 5       | 96        | 23.7    | 23.7          | 62.0               |
| Valid 6 | 34        | 8.4     | 8.4           | 70.4               |
| 7       | 44        | 10.9    | 10.9          | 81.2               |
| 8       | 41        | 10.1    | 10.1          | 91.4               |
| 9       | 11        | 2.7     | 2.7           | 94.1               |
| 10      | 24        | 5.9     | 5.9           | 100.0              |
| Total   | 405       | 100.0   | 100.0         |                    |

## Cost of Healthcare:

**ISSUE – HEALTHCARE – INDEX: 69.75**

|         | Frequency | Percent | Valid Percent | Cumulative Percent |
|---------|-----------|---------|---------------|--------------------|
| 1       | 28        | 6.9     | 6.9           | 6.9                |
| 2       | 12        | 3.0     | 3.0           | 9.9                |
| 3       | 18        | 4.4     | 4.4           | 14.3               |
| 4       | 19        | 4.7     | 4.7           | 19.0               |
| 5       | 42        | 10.4    | 10.4          | 29.4               |
| Valid 6 | 29        | 7.2     | 7.2           | 36.5               |
| 7       | 45        | 11.1    | 11.1          | 47.7               |
| 8       | 57        | 14.1    | 14.1          | 61.7               |
| 9       | 62        | 15.3    | 15.3          | 77.0               |
| 10      | 93        | 23.0    | 23.0          | 100.0              |
| Total   | 405       | 100.0   | 100.0         |                    |

## Cost of All Employee Benefits:

**ISSUE - EMP. BENEFITS - INDEX: 63.33**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 28        | 6.9     | 6.9           | 6.9                |
| 2              | 16        | 4.0     | 4.0           | 10.9               |
| 3              | 15        | 3.7     | 3.7           | 14.6               |
| 4              | 30        | 7.4     | 7.4           | 22.0               |
| 5              | 69        | 17.0    | 17.0          | 39.0               |
| <b>Valid</b> 6 | 42        | 10.4    | 10.4          | 49.4               |
| 7              | 48        | 11.9    | 11.9          | 61.2               |
| 8              | 61        | 15.1    | 15.1          | 76.3               |
| 9              | 41        | 10.1    | 10.1          | 86.4               |
| 10             | 55        | 13.6    | 13.6          | 100.0              |
| <b>Total</b>   | 405       | 100.0   | 100.0         |                    |

## Employee Productivity:

**ISSUE - PRODUCTIVITY - INDEX: 52.07**

|                | Frequency | Percent | Valid Percent | Cumulative Percent |
|----------------|-----------|---------|---------------|--------------------|
| 1              | 51        | 12.6    | 12.6          | 12.6               |
| 2              | 32        | 7.9     | 7.9           | 20.5               |
| 3              | 30        | 7.4     | 7.4           | 27.9               |
| 4              | 30        | 7.4     | 7.4           | 35.3               |
| 5              | 83        | 20.5    | 20.5          | 55.8               |
| <b>Valid</b> 6 | 51        | 12.6    | 12.6          | 68.4               |
| 7              | 47        | 11.6    | 11.6          | 80.0               |
| 8              | 28        | 6.9     | 6.9           | 86.9               |
| 9              | 20        | 4.9     | 4.9           | 91.9               |
| 10             | 33        | 8.1     | 8.1           | 100.0              |

|              |     |       |       |  |
|--------------|-----|-------|-------|--|
| <b>Total</b> | 405 | 100.0 | 100.0 |  |
|--------------|-----|-------|-------|--|

## Data Security:

### ISSUE - DATA SECURITY – INDEX: 55.70

|              | Frequency | Percent | Valid Percent | Cumulative Percent |
|--------------|-----------|---------|---------------|--------------------|
| 1            | 34        | 8.4     | 8.4           | 8.4                |
| 2            | 34        | 8.4     | 8.4           | 16.8               |
| 3            | 25        | 6.2     | 6.2           | 23.0               |
| 4            | 26        | 6.4     | 6.4           | 29.4               |
| 5            | 91        | 22.5    | 22.5          | 51.9               |
| 6            | 43        | 10.6    | 10.6          | 62.5               |
| 7            | 48        | 11.9    | 11.9          | 74.3               |
| 8            | 44        | 10.9    | 10.9          | 85.2               |
| 9            | 26        | 6.4     | 6.4           | 91.6               |
| 10           | 34        | 8.4     | 8.4           | 100.0              |
| <b>Total</b> | 405       | 100.0   | 100.0         |                    |

## Global Trade & Markets:

### ISSUE - GLOBAL TRADE – INDEX: 40.59

|    | Frequency | Percent | Valid Percent | Cumulative Percent |
|----|-----------|---------|---------------|--------------------|
| 1  | 97        | 24.0    | 24.0          | 24.0               |
| 2  | 56        | 13.8    | 13.8          | 37.8               |
| 3  | 30        | 7.4     | 7.4           | 45.2               |
| 4  | 24        | 5.9     | 5.9           | 51.1               |
| 5  | 100       | 24.7    | 24.7          | 75.8               |
| 6  | 27        | 6.7     | 6.7           | 82.5               |
| 7  | 22        | 5.4     | 5.4           | 87.9               |
| 8  | 23        | 5.7     | 5.7           | 93.6               |
| 9  | 11        | 2.7     | 2.7           | 96.3               |
| 10 | 15        | 3.7     | 3.7           | 100.0              |



|              |     |       |       |  |
|--------------|-----|-------|-------|--|
| <b>Total</b> | 405 | 100.0 | 100.0 |  |
|--------------|-----|-------|-------|--|

## Rising Salaries and Wages:

### ISSUE - RISING WAGES – INDEX: 50.94

|              | Frequency | Percent | Valid Percent | Cumulative Percent |
|--------------|-----------|---------|---------------|--------------------|
| 1            | 52        | 12.8    | 12.8          | 12.8               |
| 2            | 36        | 8.9     | 8.9           | 21.7               |
| 3            | 26        | 6.4     | 6.4           | 28.1               |
| 4            | 21        | 5.2     | 5.2           | 33.3               |
| 5            | 96        | 23.7    | 23.7          | 57.0               |
| 6            | 57        | 14.1    | 14.1          | 71.1               |
| 7            | 44        | 10.9    | 10.9          | 82.0               |
| 8            | 35        | 8.6     | 8.6           | 90.6               |
| 9            | 13        | 3.2     | 3.2           | 93.8               |
| 10           | 25        | 6.2     | 6.2           | 100.0              |
| <b>Total</b> | 405       | 100.0   | 100.0         |                    |

## Political Environment in Ohio:

### ISSUE - POLITICAL ENVIRONMENT – INDEX: 58.74

|    | Frequency | Percent | Valid Percent | Cumulative Percent |
|----|-----------|---------|---------------|--------------------|
| 1  | 19        | 4.7     | 4.7           | 4.7                |
| 2  | 29        | 7.2     | 7.2           | 11.9               |
| 3  | 31        | 7.7     | 7.7           | 19.5               |
| 4  | 22        | 5.4     | 5.4           | 24.9               |
| 5  | 92        | 22.7    | 22.7          | 47.7               |
| 6  | 57        | 14.1    | 14.1          | 61.7               |
| 7  | 35        | 8.6     | 8.6           | 70.4               |
| 8  | 49        | 12.1    | 12.1          | 82.5               |
| 9  | 28        | 6.9     | 6.9           | 89.4               |
| 10 | 43        | 10.6    | 10.6          | 100.0              |

|              |     |       |       |  |
|--------------|-----|-------|-------|--|
| <b>Total</b> | 405 | 100.0 | 100.0 |  |
|--------------|-----|-------|-------|--|

## Technology Changes:

### ISSUE - TECH CHANGES – INDEX: 54.81

|              | Frequency | Percent | Valid Percent | Cumulative Percent |
|--------------|-----------|---------|---------------|--------------------|
| 1            | 27        | 6.7     | 6.7           | 6.7                |
| 2            | 31        | 7.7     | 7.7           | 14.3               |
| 3            | 21        | 5.2     | 5.2           | 19.5               |
| 4            | 35        | 8.6     | 8.6           | 28.1               |
| 5            | 96        | 23.7    | 23.7          | 51.9               |
| <b>Valid</b> | 52        | 12.8    | 12.8          | 64.7               |
| 7            | 64        | 15.8    | 15.8          | 80.5               |
| 8            | 42        | 10.4    | 10.4          | 90.9               |
| 9            | 18        | 4.4     | 4.4           | 95.3               |
| 10           | 19        | 4.7     | 4.7           | 100.0              |
| <b>Total</b> | 405       | 100.0   | 100.0         |                    |

## State/Local Taxes:

### ISSUE - STATE/LOCAL TAXES – INDEX: 58.69

|              | Frequency | Percent | Valid Percent | Cumulative Percent |
|--------------|-----------|---------|---------------|--------------------|
| 1            | 26        | 6.4     | 6.4           | 6.4                |
| 2            | 25        | 6.2     | 6.2           | 12.6               |
| 3            | 29        | 7.2     | 7.2           | 19.8               |
| 4            | 20        | 4.9     | 4.9           | 24.7               |
| 5            | 89        | 22.0    | 22.0          | 46.7               |
| <b>Valid</b> | 51        | 12.6    | 12.6          | 59.3               |
| 7            | 52        | 12.8    | 12.8          | 72.1               |
| 8            | 47        | 11.6    | 11.6          | 83.7               |
| 9            | 17        | 4.2     | 4.2           | 87.9               |
| 10           | 49        | 12.1    | 12.1          | 100.0              |
| <b>Total</b> | 405       | 100.0   | 100.0         |                    |

Question # 13. UNDISCLOSED PRIVATE INFORMATION

Question # 14. What is your title?

|       |              | TITLE     |         |               |                    |
|-------|--------------|-----------|---------|---------------|--------------------|
|       |              | Frequency | Percent | Valid Percent | Cumulative Percent |
| Valid | CEO          | 66        | 16.3    | 16.3          | 16.3               |
|       | COO          | 18        | 4.4     | 4.4           | 20.7               |
|       | CFO          | 9         | 2.2     | 2.2           | 23.0               |
|       | PRESIDENT    | 85        | 21.0    | 21.0          | 44.0               |
|       | OWNER        | 149       | 36.8    | 36.8          | 80.7               |
|       | OTHER        | 78        | 19.3    | 19.3          | 100.0              |
|       | <b>Total</b> | 405       | 100.0   | 100.0         |                    |

Question # 15. What industry classification does your company identify with (NAICS 2017)

| INDUSTRY                 |           |         |               |                    |
|--------------------------|-----------|---------|---------------|--------------------|
|                          | Frequency | Percent | Valid Percent | Cumulative Percent |
| AG - FISH - FOREST       | 14        | 3.5     | 3.5           | 3.5                |
| MINING - OIL - GAS       | 3         | .7      | .7            | 4.2                |
| UTILITIES                | 8         | 2.0     | 2.0           | 6.2                |
| CONSTRUCTION             | 32        | 7.9     | 7.9           | 14.1               |
| MANUFACTURING            | 43        | 10.6    | 10.6          | 24.7               |
| WHOLESALE                | 12        | 3.0     | 3.0           | 27.7               |
| RETAIL                   | 35        | 8.6     | 8.6           | 36.3               |
| TRANS - WAREHOUSE        | 26        | 6.4     | 6.4           | 42.7               |
| INFO SERVICES            | 15        | 3.7     | 3.7           | 46.4               |
| FINANCE - INSURANCE      | 37        | 9.1     | 9.1           | 55.6               |
| REAL ESTATE              | 8         | 2.0     | 2.0           | 57.5               |
| MANAGEMENT               | 9         | 2.2     | 2.2           | 59.8               |
| PROFESSIONAL - TECHNICAL | 38        | 9.4     | 9.4           | 69.1               |
| ADMIN, WASTE MANAGEMENT  | 6         | 1.5     | 1.5           | 70.6               |
| EDUCATIONAL              | 17        | 4.2     | 4.2           | 74.8               |
| HEALTH CARE - SOCIAL     | 42        | 10.4    | 10.4          | 85.2               |
| ARTS - RECREATION        | 11        | 2.7     | 2.7           | 87.9               |
| ACCOMODATIONS - FOOD     | 17        | 4.2     | 4.2           | 92.1               |
| OTHER SERVICES           | 22        | 5.4     | 5.4           | 97.5               |
| PUBLIC ADMIN             | 10        | 2.5     | 2.5           | 100.0              |
| <b>Total</b>             | 405       | 100.0   | 100.0         |                    |

Question # 16. Which of the following categories reflects your company's annual gross revenues?

**GROSSREVENUE**

|                | Frequency  | Percent      | Valid Percent | Cumulative Percent |
|----------------|------------|--------------|---------------|--------------------|
| <b>Valid</b>   |            |              |               |                    |
| LESS THAN 500K | 145        | 35.8         | 35.8          | 35.8               |
| 500K TO 1M     | 44         | 10.9         | 10.9          | 46.7               |
| 1M TO 5M       | 106        | 26.2         | 26.2          | 72.8               |
| 6M TO 10M      | 6          | 1.5          | 1.5           | 74.3               |
| 11M TO 50M     | 38         | 9.4          | 9.4           | 83.7               |
| 51M TO 100M    | 14         | 3.5          | 3.5           | 87.2               |
| 101M TO 500M   | 28         | 6.9          | 6.9           | 94.1               |
| 501M TO 1B     | 9          | 2.2          | 2.2           | 96.3               |
| 1B +           | 15         | 3.7          | 3.7           | 100.0              |
| <b>Total</b>   | <b>405</b> | <b>100.0</b> | <b>100.0</b>  |                    |

Question # 17. How many employees does your company have in Ohio?

**NUMBEREMPLOYEES**

|                        | Frequency  | Percent      | Valid Percent | Cumulative Percent |
|------------------------|------------|--------------|---------------|--------------------|
| <b>Valid</b>           |            |              |               |                    |
| 1 - 99 EMPLOYEES       | 318        | 78.5         | 78.5          | 78.5               |
| 100 TO 400 EMPLOYEES   | 46         | 11.4         | 11.4          | 89.9               |
| 401 TO 1000 EMPLOYEES  | 21         | 5.2          | 5.2           | 95.1               |
| 1001 TO 5000 EMPLOYEES | 20         | 4.9          | 4.9           | 100.0              |
| <b>Total</b>           | <b>405</b> | <b>100.0</b> | <b>100.0</b>  |                    |

Question # 18. Do you have any employees represented by a collective bargaining unit?

**LABORUNIONS**

|       |                   | Frequency | Percent | Valid Percent | Cumulative Percent |
|-------|-------------------|-----------|---------|---------------|--------------------|
|       | YES - LABOR UNION | 55        | 13.6    | 13.6          | 13.6               |
| Valid | NO - LABOR UNION  | 350       | 86.4    | 86.4          | 100.0              |
|       | <b>Total</b>      | 405       | 100.0   | 100.0         |                    |

Question # 19. If you would like to receive a copy of survey results please provide an email address: