October 2018

12







12th Annual Lewis County Survey of the Community – Summary of Findings

Summary of Findings

Section 2.0 – The View from 30,000 Feet! (or, "if one only has 30 seconds to review this report")

1. Attitudes Concerning the Local Lewis County Economy

Since 2017, many local community quality-of-life indicators that are related to personal and local economics have resulted with the most positive results measured in 12 years of surveying in the county. Although there remains much room for improvement, residents feel better than ever (at least since year 2007) regarding – the overall state of the local economy, and the availability of good jobs. For "Availability of Good Jobs" — the rate of responding "Poor" has decreased dramatically and significantly from the all-time high of 57% found in 2011, and more recently from a rate of 53% found in the county in 2014, to the current 2018 all-time low rate of 32%; while at the same time "Excellent or Good" has reached an all-time high in the county of 26% in 2018 (was only 10% in 2011). For "Overall State of the Local Economy" — satisfaction is at the highest level ever measured in 2018, with very significant improvement found between 2013-2018. The 2018 "Poor" rate of 20% now is the lowest found between 2008-2018 (was only 19% in 2007), and the rate of "Excellent or Good" has now reached the all-time high of 45% (more than double earlier rates that have been as low as 19% in 2013).

2. Personal Financial Situations

Currently 83% of residents indicate that their **personal financial situation has remained the same or improved in the past year** (19% improved, 64% remained same), while only 16% indicate that this situation has gotten worse. In 2017, for the first time residents of Lewis County were more likely to indicate that their families' personal financial situations had gotten better over the past 12 months than they were to indicate that it had gotten worse (21% versus 9%, respectively in 2017), and for the second time ever, in 2018 this better-larger-than-worse scenario occurred – with 2018 rates of 19% "gotten better", and only 16% "gotten worse". As a comparison, in 2008 the rates were – 12% "gotten better", and a huge 40% "gotten worse". A dramatic positive trend in families' financial situations has occurred in the county since 2013.

3. Community Development in Lewis County

Four types of community development of assets were studied in Lewis County for the first time in 2018 (community parks, downtown parking, main streets, and water and wastewater systems). While strong support is evident among residents for the development of all of these community assets (with the exception of downtown parking), the largest level of support was expressed for "improved water and wastewater systems" as the most important community asset to improve in the future (45% cited this as the most important).

4. Economic Development in Lewis County

Four types of potential economic development initiatives were studied in Lewis County for the first time in 2018 (tourism/recreation marketing; more ATV/snowmobile trails; more walking trails; acquiring public access to railroad corridors). There is strong majority support evident for each of these initiatives, with the largest support (82%) expressed for development of more public pedestrian walking trails, and 81% support for tourism and recreation related development and marketing. To obtain public input for future decisions regarding the Climax building in Lowville, "Lewis County Industrial Development Agency will soon own the Climax building in Lowville which is to be used to promote new business growth. How do you believe the Climax building could best be used – warehousing, a food processing center, split into small sections for multiple businesses to use, or some other use?" was posed in the 2018 survey and by a wide margin, "split into smaller sections" is the most supported option. Three possible uses of taxpayer funds to create types of infrastructure needed for new business growth in Lewis County were also studied for the first time in 2018. There is very strong support evident for improving water systems, and Lewis County residents clearly prefer that new businesses construct their own buildings more than having the County construct and lease buildings to new businesses.

5. Personal Opinions Regarding Community and Societal Issues

For the first time in 12 years of surveying quality-of-life and local governance issues in Lewis County, the Center for Community Studies included a section of eleven survey items that relate to personal opinions of residents regarding issues that typically are of great importance to residents of any community and society. The issues studied ranged from healthcare funding, to social security, to the role of government, to Presidential approval, to gun control and rights, to abortion, to same-sex relationships, as well as other issues/topics that are typically commonly discussed and debated in our society. The goal was to learn what the overall predominate opinions are of the Lewis County adult community. No political stance or objective was or will be taken, of course, by the independent and unbiased researchers at the Center for Community Studies. The results are summarized in the following table, with very interesting themes of those which are typically considered as conservative stances being dominant among county adult residents at times, while those which are typically considered as more moderate or somewhat liberal stances being dominant among county adult residents at other times. In Section 3.4 of this report a thorough data analytics exercise, deeper-diving into relative dominance of most commonly held personal opinions, key drivers of opinion, and inter-correlations between opinions/issues is presented.

	Statement "A" (% Agree)	Statement "B" (% Agree)		
Supreme Court Appointments	Should reflect the political beliefs of the party in power.	11%	Should be neutral and not reflect the political beliefs of the party in power.	84%
Social Security Funding	Social security should be privatized.	20%	Social security should be mostly left alone.	74%
Responsibility for Healthcare	Societal responsibility and government should ensure that good healthcare is available to all people.	59%	Individual responsibility and government should stay out of it.	26%
Gun Control and Rights	The Second Amendment of the US Constitution protects an individual's right to own guns, and that should not be compromised by laws such as the NYS Safe Act.	61%	Gun violence in the US is out of control and some gun regulation similar to the NYS Safe Act is necessary.	33%
Same-sex Relationships	Wrong for adults to be romantically involved with other adults of the same sex.	30%	Perfectly all right for adults to be romantically involved with other adults of the same sex.	63%
Climate Change	Climate change is pretty much exaggerated speculation.	34%	Climate change is pretty much a proven scientific conclusion.	59%
Abortion	Choosing abortion is a woman's right, and society should protect that right.	60%	Abortion is morally wrong, and society should prohibit it.	32%
Presidential Approval	Overall I think President Trump is good for our country.	61%	Overall I think President Trump is bad for our country.	31%
Federal Income Tax Cuts	Only significantly benefited the very rich US residents.	52%	Significantly benefited all US residents.	32%
MeToo! Movement	Out of hand and greatly exaggerates some bad experiences of some women.	34%	Long overdue and is finally opening up peoples' eyes to the inappropriate behavior that women have endured for years.	48%
Globalism vs. Nationalism	The US needs to maintain its strong leadership role in the world political and economic order.	38%	The US needs to refocus its attention on our own people and problems and let the rest of the world take care of itself.	51%

Section 2.1 – Quality of Life in Lewis County

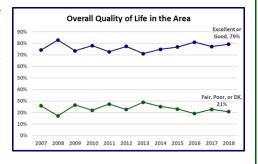
Summary of 2018 Quality-of-Life Indicators Results:

1. In an attempt to gauge the current satisfaction with the quality of life in Lewis County, participants were provided a list of 11 key community characteristics, or indicators. For each of these characteristics, the participants reported whether they feel that the characteristic in the county is "Excellent," "Good," "Fair," or "Poor." Table 5 summarizes the results with the percentage that indicated that each indicator is "Excellent or Good" reported, as well as the percentage who report that it is "Excellent," and finally, the percentage that indicated that each indicator is "Poor." The list of indicators in Table 5 is sorted from highest to lowest according to the percentage who replied "Excellent or Good" in 2018. The indicators whose results are in green shaded cells show significant recent improvement between 2017 and 2018 (either an increase in "Excellent" or the combined "Excellent or Good", or a decrease in "Poor"). The indicators whose results are in green shaded cells show a trend toward more negative perceptions between 2017 and 2018 (either a decrease in "Excellent" or the combined "Excellent or Good", or an increase in "Poor"). All green or gray shaded changes over the past year are of size at least ±5%. The indicators whose results are in white shaded cells show no significant trend toward either more negative and positive perceptions between 2017 and 2018.

Table 5 - Summary of Quality of Life Indicators (2018 Results sorted by "Excellent + Good")

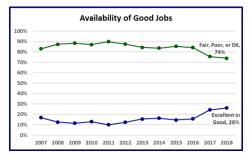
Quality of Life Indicator:	% "Excellent" + % "Good" (2017 result in parentheses)	% "Excellent" (2017 result in parentheses)	% "Poor" (2017 result in parentheses)
1. Quality of the environment	88.4% (85.1%)	27.2% (33.0%)	2.1% (1.6%)
2. The overall quality of life in the area	79.2% (77.2%)	19.0% (22.9%)	3.3% (5.5%)
3. Quality of K-12 education	78.7% (80.2%)	27.1% (31.4%)	6.0% (3.2%)
4. Health care quality	61.0% (70.4%)	10.9% (16.5%)	10.9% (6.6%)
5. Availability of housing	54.0% (60.8%)	9.0% (7.9%)	8.5% (9.9%)
6. Access to higher education	46.4% (47.0%)	6.1% (11.3%)	24.0% (21.7%)
7. The overall state of the local economy	44.9% (36.0%)	2.3% (5.4%)	20.0% (20.1%)
8. County government	43.6% (44.6%)	6.3% (3.1%)	13.7% (10.6%)
9. Cultural/entertainment opportunities	31.1% (41.0%)	4.3% (3.0%)	29.2% (12.8%)
10. Availability of good jobs	26.1% (24.4%)	1.0% (2.1%)	32.2% (34.2%)
11. Real estate taxes	24.2% (28.4%)	1.7% (3.3%)	31.0% (23.8%)

2. Most Lewis County adult residents **continue to view the overall quality of life in the region as very positive**, 79% of the surveyed residents in 2018 report that the overall quality of life in the area is "Excellent or Good" (was 77% in 2017, 81% in 2016, 77% in 2015, 75% in 2014), while only 3% currently believe the overall quality of life in the area is "Poor".



3. Availability of Good Jobs

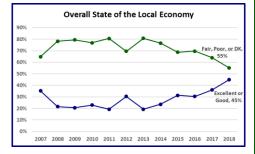
"Availability of Good Jobs" continues to be one of the most negatively-perceived community characteristic from the 11 indicators measured among adult residents of Lewis County in 2018; however, in the first 10 years of completing this study the most common response always was "Poor" while in 2017 and 2018 the most common response has improved to "Fair" (in 2016 the most common response with 43% was "Poor", while in 2017 the most common response with 39% is "Fair", and again in 2018 the most common response with 40% is "Fair"). The rate of responding "Poor" has decreased dramatically and significantly from the all-time high of 57% found in 2011, and more recently from a rate of 53% found in the county in 2014, to the current



2018 all-time low rate of 32%; while at the same time "Excellent or Good" has reached an all-time high in the county of 26% in 2018 (was only 10% in 2011).

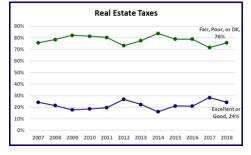
4. Overall State of the Local Economy

Satisfaction with the "Overall State of the Local Economy" in Lewis County in 2018 is at the highest level ever measured. Very significant improvement has been found between 2013-2018, The 2018 "Poor" rate of 20% now is the lowest found between 2008-2018 (was only 19% in 2007), and the rate of "Excellent or Good" has now reached the all-time high of 45% (more than double earlier rates that have been as low as 19% in 2013).



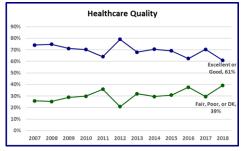
5. Real Estate Taxes

In 2014, residents of Lewis County reported a very high level of dissatisfaction with the current status of "Real Estate Taxes," with only 16% responding with "Excellent or Good" (an all-time low) and 40% responding with "Poor." Perceptions of real estate taxes have improved over the past four years. In 2018 the rate of responding "Poor" is only 31% and the rate of responding "Excellent or Good" is 24% (increased from that low of 16% in 2014).



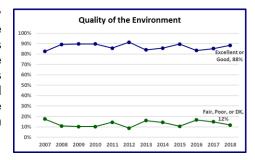
6. Healthcare Quality

Residents of Lewis County continue to report quite high satisfaction levels with "Quality of Healthcare" in the county. Satisfaction with *quality* has remained relatively stable over the twelve years of study with the current 2018 rate of 61% responding "Excellent or Good" (while only 11% respond "Poor"). However, it should be noted that while the overall assessment of quality of healthcare remains more positive than negative, the 2018 results are the most negative ever measured (11% "Excellent" is lowest ever measured, while 11% "Poor" is highest ever measured).



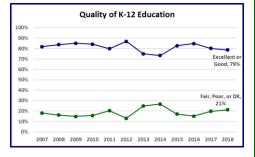
7. Quality of the Environment

The environment in Lewis County continues to be perceived very positively by residents. In 2018, as in every other year of study, this indicator is one of the two most positively rated community characteristics among the characteristics studied. A large majority of participants (88%) rate "Quality of the Environment" as "Excellent or Good" (with 27% rating as "Excellent"). This "Excellent or Good" rate has varied between 83% to 91% in all twelve studied years, while only 2% of participants currently (in 2018) rate the quality of the environment as "Poor" (was also 2% in 2017). This very positive perception is uniformly shared across all demographic subgroups studied.



8. Quality of K-12 Education

Residents of Lewis County remain very satisfied with the "Quality of the K-12 Education" available in the county. The 2014 rate of responding "Excellent or Good" was at an all-time low of 73% (was as high as 87% in 2012), and in 2018 this rate is 79%. The current rate of indicating that the "Quality of K-12 Education" community characteristic is "Poor" is only 6%, however, this is the highest "Poor" rate ever measured.



9. Availability of Housing

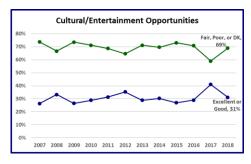
"Availability of Housing" in Lewis County has been studied for the past four years, and perceptions tend to be positive, with 54% of participants responding "Excellent or Good" in 2018, while only 9% rate as "Poor". However, the rate of "Excellent or Good" has dropped significantly from 63% to 54% over the past four years.



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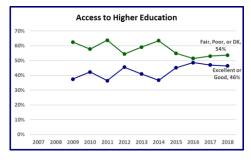
10. Cultural/Entertainment Opportunities

Residents of Lewis County continue to report low satisfaction with "Cultural/Entertainment Opportunities" in the county, with this indicator in 2018 the 9th most positive rated characteristic among the 11 indicators that are tracked. In 2018, 31% rate this quality-of-life indicator as "Excellent or Good" (was 41% in 2017), while "Poor" in 2018 is at a rate of 29%, which is tied as the all-time high rate of responding "Poor" and significantly increased from 13% found in 2017.



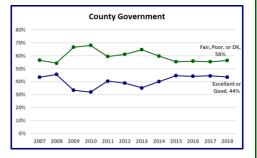
11. Access to Higher Education

"Access to Higher Education" as a community indicator has been measured since 2009 in Lewis County. For the past four years, 2015-2018, residents have been more positive than measured previously about these opportunities. In 2014 it was found that only 37% rated this indicator as "Excellent or Good", (with 32% rating it as "Poor"), in 2018 these perceptions have improved to 46% rating this indicator as "Excellent or Good", (with only 24% rating it as "Poor"). The results in 2018 are very similar to that which was found in 2015-2017 in Lewis County. However, Lewis County Satisfaction (46%) lags well below each of Jefferson and St. Lawrence Counties (rates of 74% and 75%, respectively, responding "Excellent or Good" in these counties).



12. County Government

Residents of Lewis County continue to be neither tremendously satisfied nor dissatisfied with the quality of local government in the county. The majority of participants in 2018 (73%) rate "County Government" as either "Fair" or "Good" (similar to 76% found in 2011, 75% found in 2012, 65% in 2013, 74% in 2014, 69% in 2015, 75% in 2016, and 78% in 2017). Note, however, that "Good" has been the most common response in all five of 2014-2018, while in 2009-2013 the most common response was "Fair".

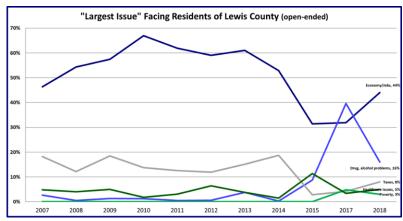


<u>Section 2.2 – Personal Opinions – Issues in Our Society and Communities</u>

13. For the first time in 12 years of surveying quality-of-life and local governance issues in Lewis County, the Center for Community Studies included a section of eleven survey items that relate to personal opinions of residents regarding issues that typically are of great importance to residents of any community and society. The issues studied ranged from healthcare funding, to social security, to the role of government, to Presidential approval, to gun control and rights, to abortion, to same-sex relationships, as well as other issues/topics that are typically commonly discussed and debated in our society. The goal was to learn what the overall predominate opinions are of the Lewis County adult community. No political stance or objective was or will be taken, of course, by the independent and unbiased researchers at the Center for Community Studies. The question phrasing is detailed in the exact format used in the telephone interviews later in Section 3.4 of the full report. The results are summarized in the table on the following page, with very interesting themes of what is normally considered as conservative stances being dominant among county adult residents at times, while what is normally considered as moderate or somewhat liberal stances being dominant among county adult residents at other times. In Section 3.4 a thorough data analytics exercise, deeper-diving into relative dominance of most commonly held personal opinions, key drivers of opinion, and inter-correlations between opinions/issues is presented.

	Statement "A"	% Agree "A"	Statement "B"	% Agree "B"	Difference in %	Ratio (A:B or B:A)
Supreme Court Appointments	Should reflect the political beliefs of the party in power.	11%	Should be neutral and not reflect the political beliefs of the party in power.	84%	73%	7.3
Social Security Funding	Social security should be privatized.	20%	Social security should be mostly left alone.	74%	54%	3.6
Responsibility for Healthcare	Societal responsibility and government should ensure that good healthcare is available to all people.	59%	Individual responsibility and government should stay out of it.	26%	33%	2.3
Gun Control and Rights	The Second Amendment of the US Constitution protects an individual's right to own guns, and that should not be compromised by laws such as the NYS Safe Act.	61%	Gun violence in the US is out of control and some gun regulation similar to the NYS Safe Act is necessary.	33%	28%	1.8
Same-sex Relationships	Wrong for adults to be romantically involved with other adults of the same sex.	30%	Perfectly all right for adults to be romantically involved with other adults of the same sex.	63%	33%	2.1
Climate Change	Climate change is pretty much exaggerated speculation.	34%	Climate change is pretty much a proven scientific conclusion.	59%	25%	1.7
Abortion	Choosing abortion is a woman's right, and society should protect that right.	60%	Abortion is morally wrong, and society should prohibit it.	32%	28%	1.9
Presidential Approval	Overall I think President Trump is good for our country.	61%	Overall I think President Trump is bad for our country.	31%	30%	2.0
Federal Income Tax Cuts	Only significantly benefited the very rich US residents.	52%	Significantly benefited all US residents.	32%	20%	1.6
MeToo! Movement	Out of hand and greatly exaggerates some bad experiences of some women.	34%	Long overdue and is finally opening up peoples' eyes to the inappropriate behavior that women have endured for years.	48%	14%	1.4
Globalism vs. Nationalism	The US needs to maintain its strong leadership role in the world political and economic order.	38%	The US needs to refocus its attention on our own people and problems and let the rest of the world take care of itself.	51%	13%	1.4

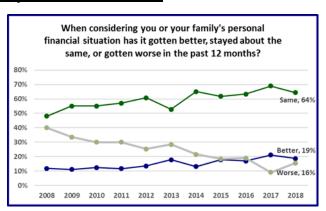
14. For eleven of the twelve years of surveying in Lewis County (only exception being 2016) the question "What is the single largest issue facing residents of Lewis County right now?" has been included in this Annual Survey. This question is open-ended, giving the residents the opportunity to specify the primary issue, while they may earlier have identified several issues as "Poor" via responses to the preceding 11 community indicators, or potentially strongly agreed with one of the 11 personal opinion statements, or potentially a "largest issue" does not happen to be included in the earlier survey script. There has been a notable change in



sentiment regarding the largest local issue in the past year. "**Economy/Jobs**" increased significantly between 2017-2018 from 32% to 44% (but was as high as 67% in 2010); while "**Drug/Alcohol Problems**" has decreased from 40% in 2017 to the current 16% (was as low as 0% as recently as 2014).

Section 2.3 – Personal Financial and Employment Situation

15. In 2017, for the first time residents of Lewis County were more likely to indicate that their **families' personal financial situations had gotten better over the past 12 months** than they are to indicate that it had gotten worse (21% versus 9%, respectively in 2017), and for the second time ever, in 2018 this better-larger-than-worse scenario occurred – with 2018 rates of 19% "gotten better", and only 16% "gotten worse". As a comparison, in 2008 the rates were – 12% "gotten better", and a huge 40% "gotten worse". A dramatic positive trend in families' financial situations has occurred in the county since 2013.



- 16. Adults in Lewis County most commonly (73%) report that **they expect to spend about the same this year on tourism activities and entertainment as they did last year**, with about one-in-ten (10%) reporting that they plan to spend more. Results have remained very consistent between 2017 and 2018 (2017: "Same"=74%, "More"=10%).
- 17. To better understand digital access in Lewis County, **Internet access at home** and the **quality of that Internet access**, have been recorded in each of 2015, 2016, and 2018. Access to the Internet at home (not including via cellular phone data) has remained quite constant with approximately 80% having Internet access, and satisfaction with the quality of access is more positive than negative (56% "Excellent or Good" in 2018, while only 26% "Poor"), however, the rate of reporting the quality as "Poor" has increased from 16% in 2015 to the current rate of 26%.
- 18. The **employment status and occupation** of Lewis County residents has been studied in each of 2008 through 2018 with results remaining quite consistent, with the following two exceptions: the percentage of participants who report to be retired has increased from 21% in 2007 to 33% in 2018, and "blue-collar employment" has decreased from 25% in 2014 to a current rate of 8%. Among the currently employed adults in Lewis County, approximately one-in-four (27%) has **an occupation that involves working remotely from home** (13% "entirely", and 14% "partly"). About one-in-three of the employed adults (32%) indicates that their **employer allows working remotely from home**. These 2018 results have established an initial baseline against which future surveying will track employment trends in the county.

Section 2.4 – Information Access in Lewis County

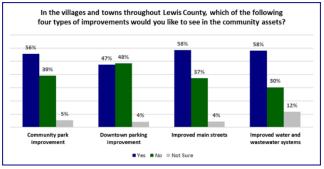
- 19. To assist local agencies that may be interested in how to best publicize events, in each of 2016 and 2018, the following question was asked to Lewis County residents: "Could you tell me your primary source of information about local events?" In 2018, the Internet by a wide margin is the most common source cited (with 38%, significantly increased from 22% in 2016), followed by television (18%), radio (16%), word of mouth (16%), and printed newspaper (11%, the survey question responses specified that these printed newspapers could be any of daily, weekly, monthly, etc.). Note that no further attempt was made to identify which specific websites or television stations or printed newspapers were the sources.
- 20. To better understand information access among Lewis County adult residents, in each of 2016 and 2018, the following question was asked: "Could you tell me your primary source of information about local news?" In 2018, television and the Internet are the most common sources cited (with 34% and 31%, respectively, a significant increase in citing the Internet from 24% in 2016), followed by radio (18%), and printed newspaper (9%, survey question responses specified that these printed newspapers could be any of daily, weekly, monthly, etc.). Note that no further attempt was made to identify which specific websites or television stations or printed newspapers were the sources.

Section 2.5 – Local Government and Services – Public Transportation

21. A series of awareness and opinion items regarding **Lewis County Public Transportation** was included in the 2018 survey script. Approximately five-in-six adults (82%) have heard of Lewis County Public Transportation, about one-in-nine adults (11%) in the county know someone who is unemployed due to lack of transportation, and about 9% know someone who lacks transportation necessary to access educational opportunities. When asked if one would spend \$25 monthly for an unlimited bus pass throughout all of Jefferson, Lewis, and Oneida Counties, close to one-half of participants (43%) responded "Yes".

Section 2.6 – Local Government and Services – Community Development

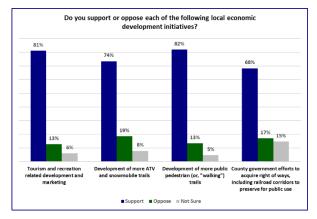
22. Four types of community development of assets were studied in Lewis County for the first time in 2018. When individuals were asked individually whether or not they support these four developments, the results are summarized in the graph to the right. To determine which community asset has the largest level of support, a forced-choice follow-up question was posed and by a wide margin, "improved water and wastewater systems" has the largest public support as the most important community asset to improve in the future (45% cited this as the most important).



23. When asked whether one believes that **local governments are doing enough to improve their own infrastructures**, residents are more likely to respond "Yes" (51%) than "No" (38%).

Section 2.7 - Local Government and Services - Economic Development

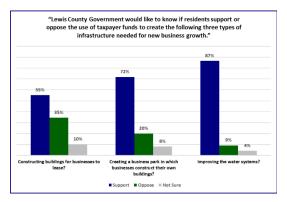
24. Four types of potential economic development initiatives were studied in Lewis County for the first time in 2018. When individuals were asked individually whether or not they support these four developments initiatives, the results are summarized in the graph to the right. There is strong majority support evident for each of these initiatives.



25. To obtain public input for future decisions regarding the Climax building in Lowville, the Lewis County IDA asked the Center for Community Studies to include the following survey question: "Lewis County Industrial Development Agency will soon own the Climax building in Lowville which is to be used to promote new business growth. How do you believe the Climax building could best be used – warehousing, a food processing center, split into small sections for multiple businesses to use, or some other use?" By a wide margin, "split into smaller sections" is the most supported option, as shown in the table to the right.

		Unweighted Frequency	Weighted Percentage
	Warehousing	33	8.8%
	Food processing center	56	15.9%
	Split into small sections	214	61.1%
	Anything is better than nothing	10	2.8%
Prefered use	College Extension	5	0.8%
of Climax building in	County should not be involved in building	6	1.8%
Lowville	Youth/Recreation	7	2.1%
	Manufacturing/Industry	12	2.7%
	Whatever brings most jobs	12	1.7%
	Other	11	2.3%
	Totals	366	100.0%

26. Three possible uses of taxpayer funds to create types of infrastructure needed for new business growth in Lewis County were studied for the first time in 2018. When individuals were asked individually whether or not they support these four developments initiatives, the results are summarized in the graph to the right. There is very strong support evident for improving water systems, and Lewis County residents clearly prefer that new businesses construct their own buildings more than having the County construct and lease buildings to new businesses.



Section 2.8 - Local Government and Services - Appointment vs. Election

27. Lewis County residents are far more likely to support "public election" than "government appointment" for two studied local government positions. When asked: Would you support or oppose a change from an elected County Treasurer to a position as treasurer that is appointed by County Government?, residents are far more likely to respond "Elected" (57%) than "Change to appointed" (29%). When asked: Would you support or oppose a change from an elected Town Highway Superintendent to a position that is appointed by Town Government?, similarly, residents are far more likely to respond "Elected" (60%) than "Change to appointed" (30%).

Section 2.9 - Local Government and Services - Information Dissemination

28. By a large margin in 2018 Lewis County residents tend to *agree* that they are adequately informed about issues facing the County – 66% agree with the statement that they are adequately informed (was only 51% in 2013), while currently only 31% disagree (was 45% in 2013). These changes in level of agreement represent a significant improvement in recent years.

