

Grand Vision

2012 Community Research

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APPENDIX A: SURVEY INSTRUMENT

EXECUTIVE SUMMARY

The objective of the research was to determine views and opinions of community members concerning the Grand Vision process and regional development preferences. The survey was conducted by telephone with a random selection of residents, 18 and over, within a six-county area, including Antrim, Benzie, Grand Traverse, Kalkaska, Leelanau, and Wexford Counties.

The current research was designed for comparison to baseline data, collected in 2009. The 2012 survey instrument contained many of the same survey questions as the 2009 instrument to allow for this comparison. The 2009 survey instrument was developed based upon questions explored in the Grand Vision Decision, a broad public-input process in which area residents explored options for future growth and development patterns and registered their preferences by responding to questions posed through a written “scorecard.”

The survey was conducted by Northwestern Michigan College – Research Services using a Random Digit Dial (RDD) sample of residential telephone numbers. Quotas of 75 completed surveys were established for all counties except Grand Traverse, the most populous county in the region, for which 200 surveys were completed. A total of 583 completed surveys are included in the final data file.

The margin of error for regional results is estimated at +/- 4.05%; margin of error for Grand Traverse County specifically is +/-6.9%, while results for all other counties have a margin of error of approximately +/-11.2%.

Highlights:

- With regard to awareness of, and participation in, the Grand Vision Process, the slight majority of respondents (56%) reported they had not previously heard of the Grand Vision. Residents of Leelanau and Grand Traverse Counties were most likely to report past participation.
- The majority of respondents indicating they had participated in, or had knowledge of, the Grand Vision Process reported they are in favor of the Grand Vision as a process for planning to achieve community goals. This result was consistent across demographic subgroups.
- The most favored future scenario among visions A, B, C, and D, was vision C, selected by 54% of respondents; vision D was the next most frequently selected scenario at 28%.
 - This pattern—vision C as the most common choice, followed by vision D—was demonstrated within most demographic subgroups. Groups that varied included Wexford County respondents, with 48% opting for vision D and 35% for vision C; 18-24 year old respondents, with 44% opting for vision D and 32% for vision C; and respondents with employment status “all other-collapsed with full-time student,” with 41% opting for vision D and 36% for vision C.

- Respondents were broadly supportive of two vision statements tested in the survey. The first was focused on the importance of unique and vibrant city and village centers and the second on preserving the scenic beauty and natural assets of the region, with 82% and 98% of respondents, respectively, expressing agreement.
- Survey participants have favorable attitudes about the Grand Vision process, as revealed in their responses to questions focused on a regional approach to planning for future growth, involvement of their local elected officials in the Grand Vision, and their own personal involvement in the process. Responses were favorable whether respondents had previously participated in the Grand Vision, had heard of the process but not participated to date, or were hearing of the Grand Vision for the first time in the context of the survey.
- Respondents were highly supportive of future investment in trails and sidewalks and in public transportation, with 80% indicating they “strongly” or “somewhat” agree that future investments in transportation should include trails and sidewalks “even if it means some roads aren’t widened” and 75% indicating they “strongly” or “somewhat” agree that future investments in transportation should include more public transportation, “even if it means some roads aren’t widened.”
- Many respondents indicated they would consider living in a neighborhood “with smaller yards and some apartments or condominiums” if they could “walk or ride a bike to shops, jobs, schools and parks.” Fifty-five percent of survey respondents agreed “strongly” or “somewhat” with this statement.
- Respondents are divided on the priority to be placed on building new roads and widening existing roads. Fifty-eight percent agreed “strongly” or “somewhat” that “...building new roads and widening existing roads should be the first priority for transportation spending in the region.” When asked to choose between “expanding capacity with new and wider roads” or “repairing and improving the roads we have,” 86% prioritized maintenance over expansion.
- When asked to rate the quality of their life presently, five years ago and as expected five years in the future, on a 10-step Ladder of Life, the majority of survey respondents assigned a rating of six to 10 (the high end of the scale) for each point in time; eighty-eight percent of respondents indicated that five years from now they expect to be on a step of six or higher.
- When asked to think about the quality of life of their own, or a friend’s, children or grandchildren, and if they expect that quality of life to increase or decrease in the future, 66% indicated they see quality of life increasing, while 26% reported they believe it will decrease.
- In conclusion, respondents were asked, “Do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?” Sixty percent of survey respondents indicated they feel things in their community are going in the right direction, while 30% reported things are “on the wrong track.”

1.0 OVERVIEW

Objective: The purpose of the research was to determine views and opinions of community members in the six-county area (Antrim, Benzie, Grand Traverse, Kalkaska, Leelanau and Wexford) concerning the Grand Vision process and regional development preferences. Survey respondents first rated their agreement with a statement regarding the Grand Vision as a process for planning to achieve community goals, which was followed by items assessing agreement with a series of statements about how the region could develop in the future. Additionally, survey items addressed quality of life in the region, with respondents assigning ratings based upon the “Ladder of Life” in their own area of northwest Lower Michigan.

Methodology: A telephone survey was conducted with a random sample of residents, 18 and over, in the six-county area (Antrim, Benzie, Grand Traverse, Kalkaska, Leelanau and Wexford). The final sample included 583 respondents.

The survey was conducted from September 10 to October 19, 2012. Up to four attempts were made to contact randomly selected area residents; time of day (9:00 am to 12:00 pm, 1:00 pm to 4:00 pm, and 6:00 pm to 9:00 pm) and day of week (Monday through Saturday) varied. Beginning September 28, respondents were screened for age 64 years and younger to more closely align sample age distribution with county demographics; beginning October 3, respondents were screened for age 54 years and younger; on October 4, screening began for 34 years and younger and October 11, screening began for 44 years and younger.

Survey data were analyzed using SPSS for Windows. Analyses include descriptive statistics for each survey item and a series of cross-tabulations conducted with select variables to assess significant relationships.

Throughout the report, tables and graphs, which highlight agreement percentages of various demographic subgroups, illustrate both 2012 and 2009 (when available) results¹. The survey instrument is included in Appendix A.

¹ Tables – Demographic breakouts exclude “Don’t Know” responses.

2.0 SURVEY RESULTS

2.1 Participation in and Support of the Grand Vision Process

Survey participants were first provided with a brief overview of the Grand Vision process, then asked to indicate their level of involvement in the Grand Vision process, with options ranging from “involved and completed scorecard” to “have not previously heard of the Grand Vision.” As shown in Figure 1, 10% of 2012 survey respondents reported some level of participation in the Grand Vision, with 5% reporting completion of a scorecard. Over half of those surveyed (56%) had not previously heard of the process and remaining respondents (34%) indicated they were aware of the Grand Vision process, but had not been involved.

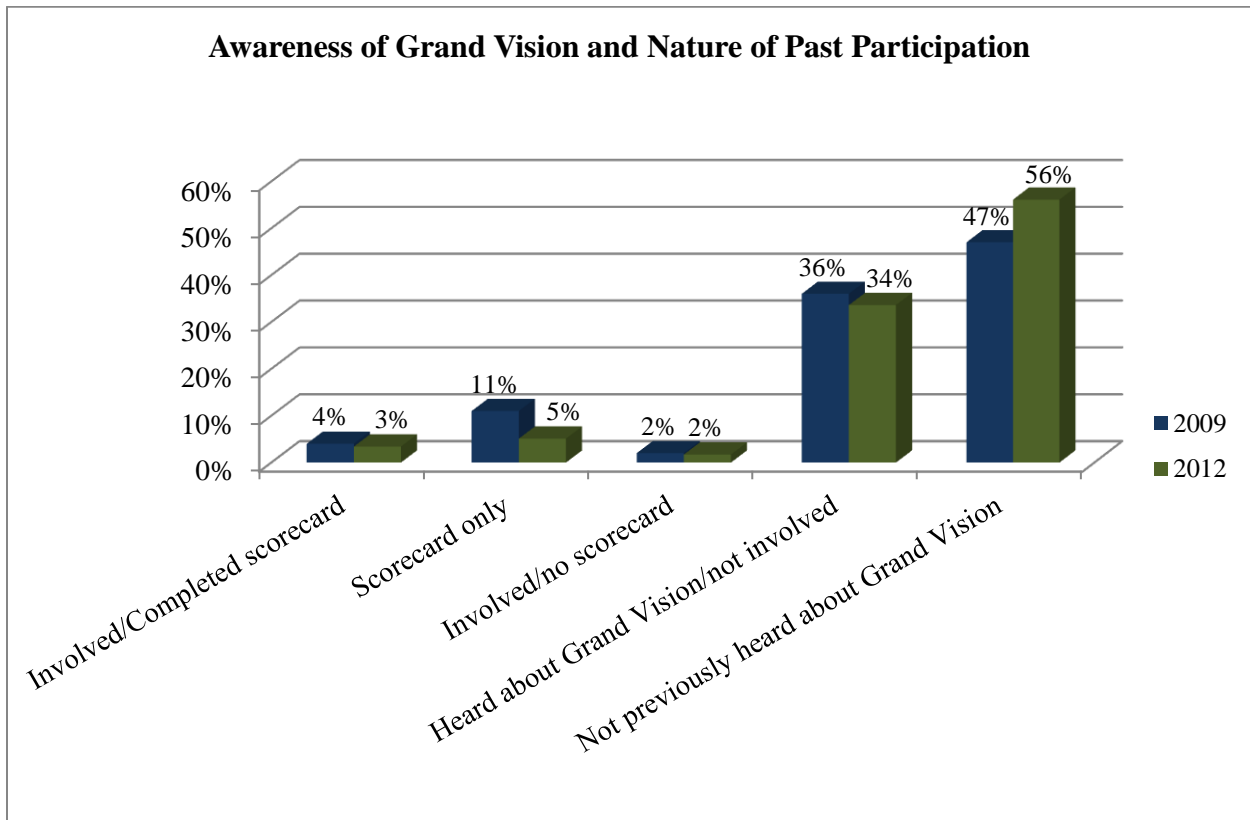


Figure 1

Survey respondents in Antrim, Kalkaska and Wexford Counties were significantly less likely to report they had participated in the Grand Vision process (less than 10% in each county), with those in Antrim and Wexford also more likely to report that they had not previously heard of the Grand Vision (64% in Antrim and 78% in Wexford). Residents of Leelanau and Grand Traverse Counties were most likely to report past participation as well as least likely to report that they had not previously heard of the Grand Vision.

Respondents indicating participation in, and/or knowledge of, the Grand Vision process were asked to rate their level of agreement with the statement, "I am in favor of the Grand Vision as a process for planning to achieve community goals." Figure 2 highlights results. Table 1 shows the combined percentages of those agreeing "strongly" and "somewhat" with the statement among several demographic subgroups.

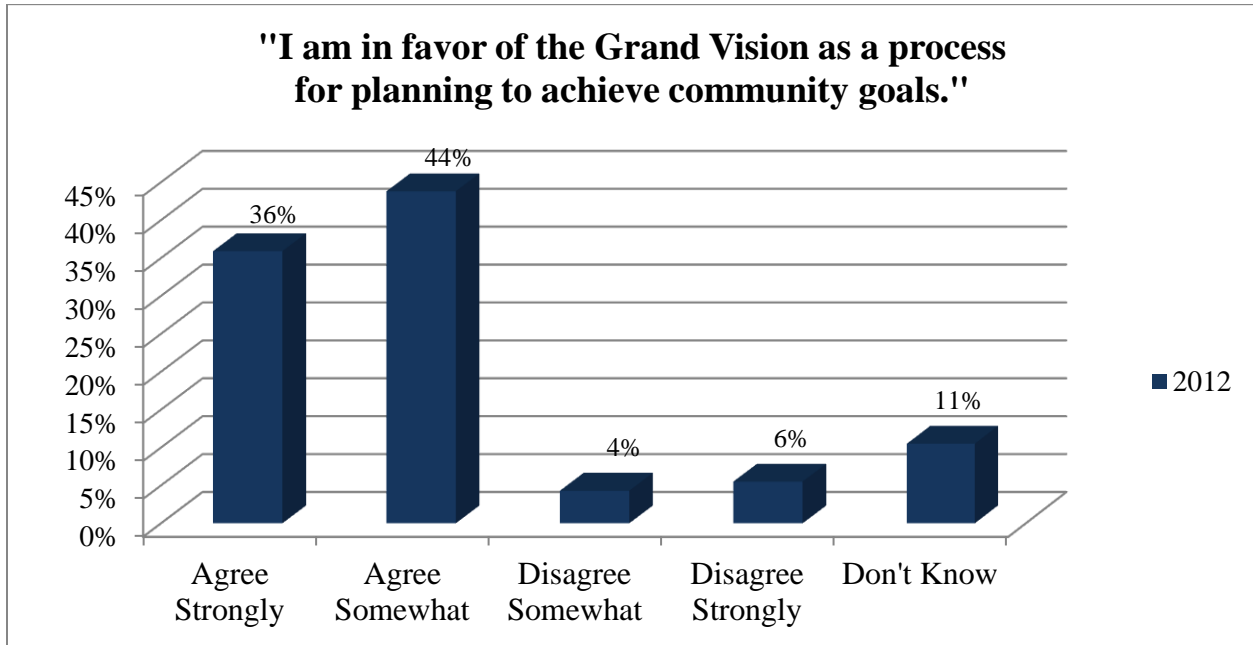


Figure 2

Table 1: Demographic Breakouts: Percentages Agreeing "Strongly" or "Somewhat"					
<i>Statement Tested: "I am in favor of the Grand Vision as a process for planning to achieve community goals."</i>					
Attribute	Percent	Attribute	Percent	Attribute	Percent
Age	2012	Education	2012	Employment	2012
18-24	90%	High school diploma or less	76%	Employed full time	85%
25-34	92%	Some college	76%	Employed part time	82%
35-44	83%	Associate's degree	82%	Self-employed	73%
45-54	75%	Bachelor's degree	81%	Retired	79%
55-64	79%	Graduate degree	86%	Laid off/unemployed	83%
65 and up	80%			Person with disabilities	77%
		Household Income	2012	Homemaker	80%
Gender	2012	Less than \$35,000/yr	90%	All others	56%
Male	75%	\$35,000/yr - \$49,999/yr	78%		
Female	83%	\$50,000/yr - \$99,999/yr	79%	Type of Resident	2012
		\$100,000/yr or more	76%	Year round (10-12 months)	79%
Property	2012			Seasonal resident (9 or fewer months)	87%
Own	77%	Children in the Home	2012		
Rent/Other	94%	Yes	73%		
		No	82%		
County	2012	County	2012	County	2012
Antrim	78%	Grand Traverse	79%	Leelanau	84%
Benzie	84%	Kalkaska	77%	Wexford	87%

2.2 Transportation Investment

The survey included numerous questions focused on how the region should invest in transportation infrastructure, most of which were derived from the Grand Vision scorecard.² The first of these focused on trails and sidewalks, with region-wide results highlighted in Figure 3. As shown, 80% of regional respondents agreed “strongly” or “somewhat” that future transportation investments should include trails and sidewalks, “even if it means some roads aren’t widened.”

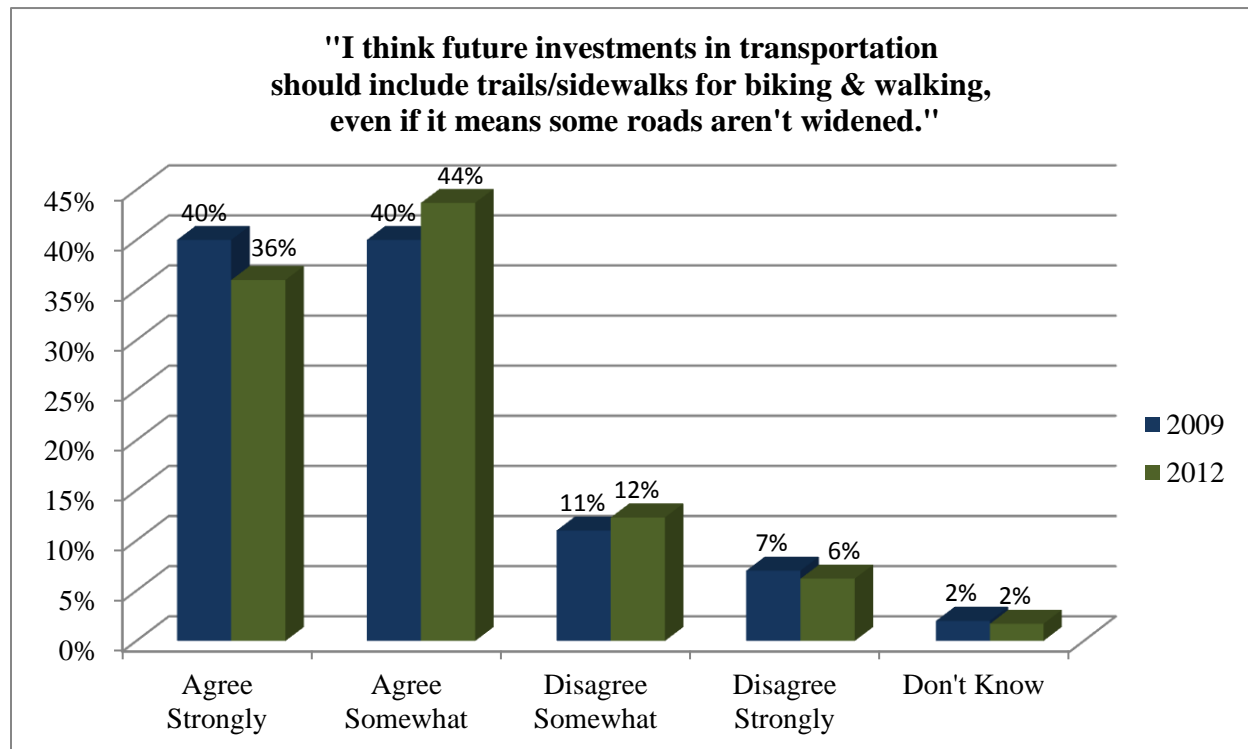


Figure 3

Additional analysis explored how preferences regarding trails and sidewalks varied with respondents’ personal characteristics (gender, age, income, employment status, educational attainment, own/rent status, type of community, and presence of children in the home). Table 2, below, displays results.

² As a general rule, most questions within the survey were intended to mirror scorecard questions as closely as possible, and many used verbatim language from the scorecard. In some instances, the language used on the written scorecard was inappropriate for a telephone survey due to length or complexity of sentence structure.

Table 2: Demographic Breakouts: Percentages Agreeing “Strongly” or “Somewhat”

Statement Tested: "I think future investments in transportation should include trails and sidewalks for biking and walking, even if it means some roads aren't widened."

Attribute	Percent		Attribute	Percent		Attribute	Percent	
Age	2009	2012	Education	2009	2012	Employment	2009	2012
18-24	95%	91%	High school diploma or less	74%	72%	Employed full time	82%	86%
25-34	87%	88%	Some college	76%	85%	Employed part time	89%	82%
35-44	78%	74%	Associate's degree	81%	77%	Self-employed	78%	58%
45-54	86%	81%	Bachelor's degree	81%	82%	Retired	70%	74%
55-64	80%	77%	Graduate degree	90%	84%	Laid off/unemployed	79%	90%
65 and up	69%	74%				Person with disabilities	81%	94%
			Household Income	2009	2012	Homemaker	94%	77%
Gender	2009	2012	Less than \$35,000/yr	79%	80%	All others	85%	77%
Male	72%	75%	\$35,000/yr - \$49,999/yr	76%	77%			
Female	84%	83%	\$50,000/yr - \$99,999/yr	83%	82%	Type of Resident		2012
			\$100,000/yr or more	77%	82%	Year round (10-12 months)		80%
Property	2009	2012	Children in the Home	2009	2012	Seasonal resident (9 or fewer months)		72%
Own	79%	77%	Yes	85%	86%			
Rent/Other	84%	89%	No	77%	78%			
			County	2009	2012	County	2009	2012
County	2009	2012	Grand Traverse	89%	81%	Leelanau	86%	80%
Antrim	72%	77%	Kalkaska	70%	80%	Wexford	83%	78%
Benzie	73%	82%						

Support is indicated by all demographic subgroups. Within groups, support was greatest among those in younger age brackets, females, renters, those with children, and year-round residents.

Figure 4 and Table 3, following, highlight results for the second question regarding transportation investment, focused on investment in public transportation. Seventy-five percent of regional respondents agreed “strongly” or “somewhat” that future transportation investments should include “more public transportation, including in-town buses and regional bus service, even if it means some roads aren’t widened.”

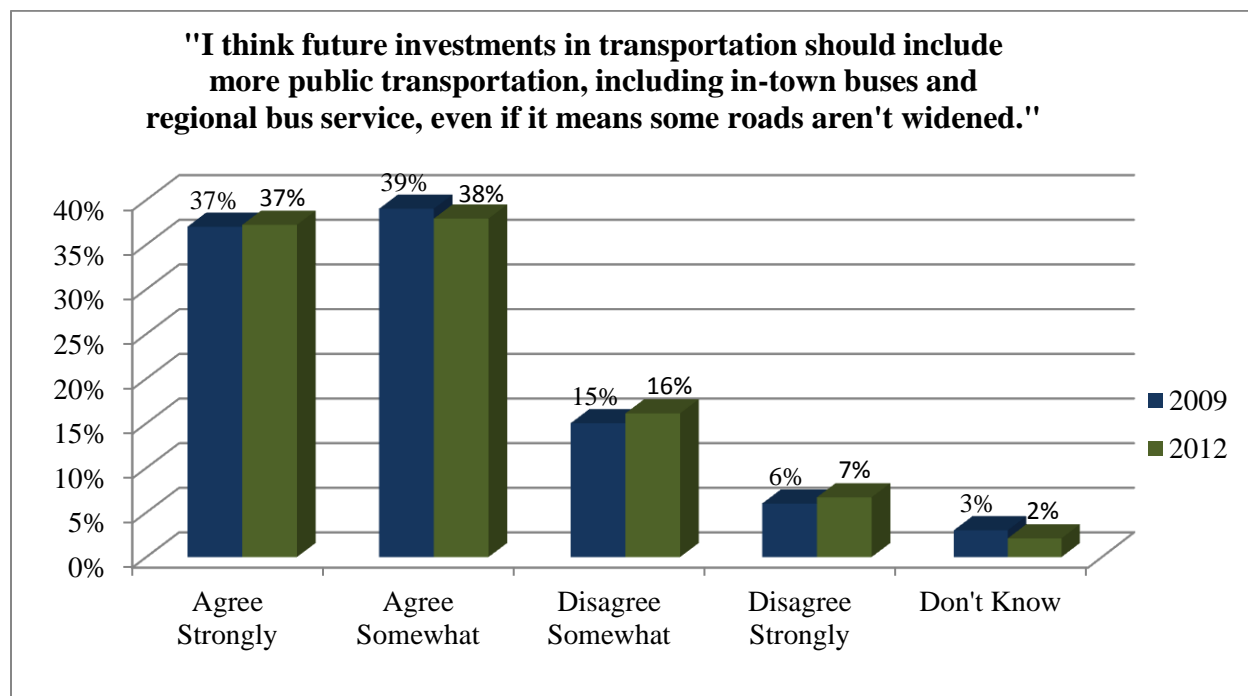


Figure 4

Table 3: Demographic Breakouts: Percentages Agreeing “Strongly” or “Somewhat”

Statement Tested: "I think future investments in transportation should include more public transportation, including in-town buses and regional bus service, even if it means some roads aren't widened."

Attribute	Percent		Attribute	Percent		Attribute	Percent	
Age	2009	2012	Education	2009	2012	Employment	2009	2012
18-24	84%	80%	High school diploma or less	80%	79%	Employed full time	75%	77%
25-34	89%	88%	Some college	81%	75%	Employed part time	78%	80%
35-44	72%	72%	Associate's degree	75%	74%	Self-employed	78%	68%
45-54	76%	81%	Bachelor's degree	73%	72%	Retired	76%	70%
55-64	78%	72%	Graduate degree	73%	77%	Laid off/unemployed	72%	84%
65 and up	76%	70%				Person with disabilities	81%	86%
			Household Income	2009	2012	Homemaker	87%	69%
Gender	2009	2012	Less than \$35,000/yr	81%	79%	All others	100%	77%
Male	69%	70%	\$35,000/yr - \$49,999/yr	81%	79%			
Female	82%	78%	\$50,000/yr - \$99,999/yr	73%	75%	Type of Resident		2012
			\$100,000/yr or more	70%	65%	Year Round (10-12 months)		76%
Property	2009	2012	Children in the Home	2009	2012	Seasonal (9 or fewer months)		68%
Own	76%	72%	Yes	78%	78%			
Rent/Other	84%	86%	No	77%	74%			
County	2009	2012	County	2009	2012	County	2009	2012
Antrim	73%	77%	Grand Traverse	78%	76%	Leelanau	73%	74%
Benzie	78%	80%	Kalkaska	83%	75%	Wexford	81%	69%

Again, as shown, all demographic subgroups indicate support for this statement. Within demographic groups, support was greatest among females, renters, year-round residents and those residing in Benzie County.

Figure 5 and Table 4 show the results for the third question regarding transportation, focused on respondents' willingness to tolerate additional traffic in villages and cities if jobs and amenities were within walking distance of parking. Seventy-nine percent of regional respondents supported the statement “strongly” or “somewhat.”

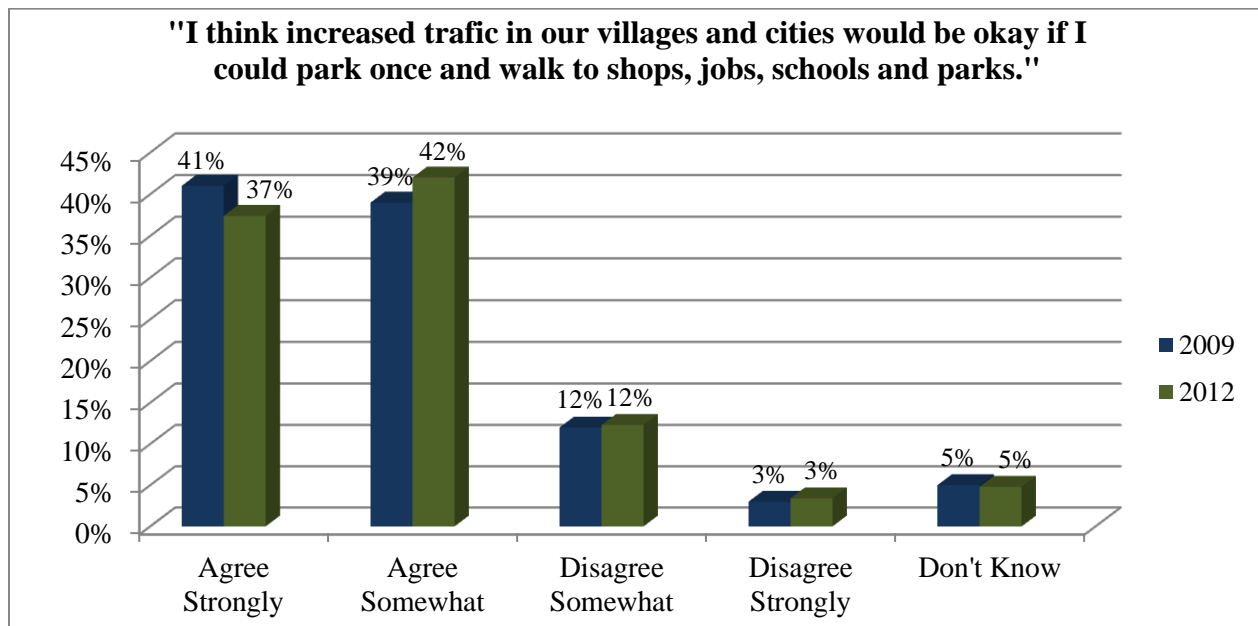


Figure 5

Table 4: Demographic Breakouts: Percentages Agreeing “Strongly” or “Somewhat”

Statement Tested: "I think increased traffic in our villages and cities would be okay if I could park once and walk to shops, jobs, schools and parks."

Attribute	Percent		Attribute	Percent		Attribute	Percent	
Age	2009	2012	Education	2009	2012	Employment	2009	2012
18-24	84%	76%	High school diploma or less	80%	79%	Employed full time	84%	89%
25-34	94%	80%	Some college	78%	79%	Employed part time	85%	87%
35-44	83%	79%	Associate’s degree	90%	73%	Self-employed	85%	79%
45-54	81%	78%	Bachelor’s degree	83%	80%	Retired	78%	81%
55-64	82%	82%	Graduate degree	82%	90%	Laid off/unemployed	85%	81%
65 and up	78%	80%				Person with disabilities	78%	70%
			Household Income	2009	2012	Homemaker	77%	85%
Gender	2009	2012	Less than \$35,000/yr	79%	77%	All others	69%	82%
Male	79%	77%	\$35,000/yr - \$49,999/yr	80%	80%			
Female	84%	81%	\$50,000/yr - \$99,999/yr	86%	84%	Type of Resident		2012
			\$100,000/yr or more	81%	78%	Year round (10-12 months)		79%
Property	2009	2012	Children in the Home	2009	2012	Seasonal (9 or fewer months)		82%
Own	81%	81%	Yes	86%	79%			
Rent/Other	90%	75%	No	81%	80%			
County	2009	2012	County	2009	2012	County	2009	2012
Antrim	91%	77%	Grand Traverse	86%	79%	Leelanau	76%	76%
Benzie	81%	90%	Kalkaska	77%	76%	Wexford	81%	81%

All demographic subgroups expressed support for this statement. Support was greatest among property owners, those in higher educational brackets, and Benzie and Wexford respondents.

Figure 6 and Table 5 highlight results for the fourth question regarding transportation, focused on new and widened roads as a first priority for transportation investment. Fifty-eight percent of regional respondents agreed “strongly” or “somewhat” that “building new roads and widening existing roads should be the first priority for transportation spending in the region,” while 39% disagreed to some extent.

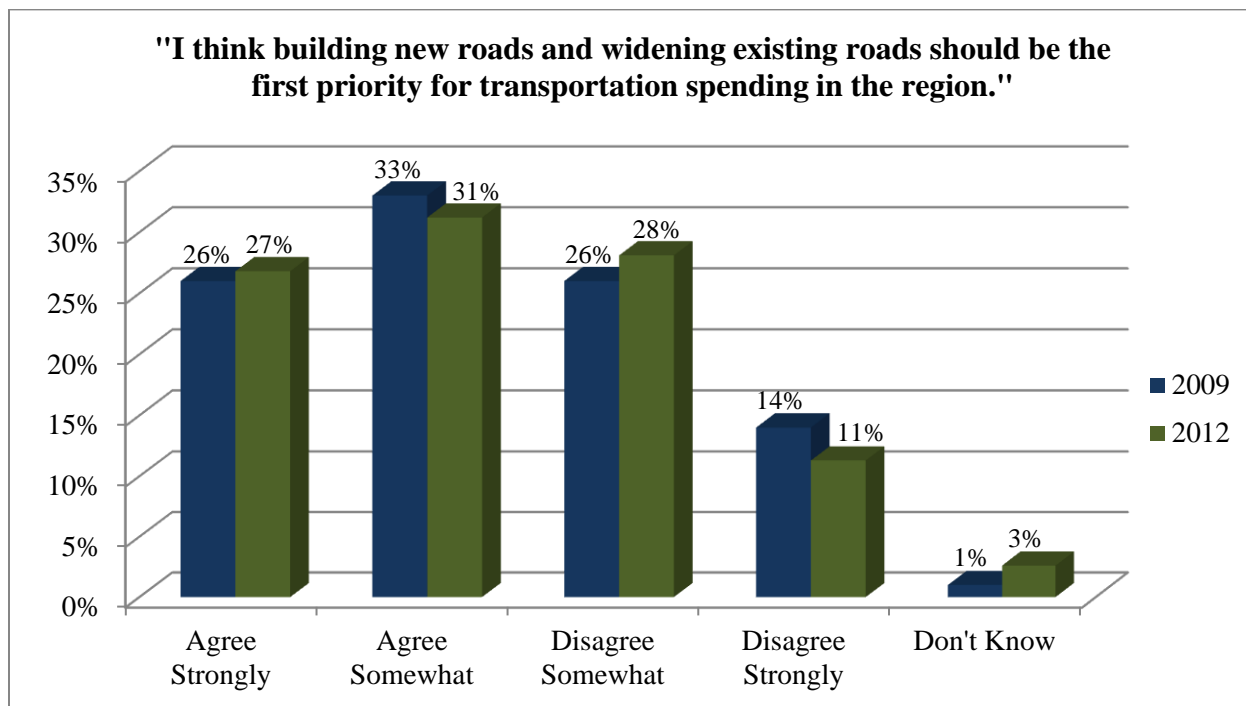


Figure 6

Table 5: Demographic Breakouts: Percentages Agreeing “Strongly” or “Somewhat”

Statement Tested: "I think building new roads and widening existing roads should be the first priority for transportation spending in the region."

Attribute	Percent		Attribute	Percent		Attribute	Percent	
Age	2009	2012	Education	2009	2012	Employment	2009	2012
18-24	68%	47%	High school diploma or less	66%	66%	Employed full time	58%	57%
25-34	63%	46%	Some college	56%	57%	Employed part time	44%	56%
35-44	53%	66%	Associate's degree	68%	64%	Self-employed	44%	53%
45-54	52%	54%	Bachelor's degree	49%	50%	Retired	60%	63%
55-64	54%	54%	Graduate degree	44%	54%	Laid off/unemployed	48%	65%
65 and up	64%	67%				Person with disabilities	71%	58%
			Household Income	2009	2012	Homemaker	73%	54%
Gender	2009	2012	Less than \$35,000/yr	61%	53%	All others	62%	43%
Male	64%	62%	\$35,000/yr - \$49,999/yr	61%	60%			
Female	53%	55%	\$50,000/yr - \$99,999/yr	53%	60%	Type of Resident		2012
			\$100,000/yr or more	49%	62%	Year round (10-12 months)		58%
Property	2009	2012				Seasonal (9 or fewer months)		61%
Own	56%	60%	Children in the Home	2009	2012			
Rent/Other	66%	51%	Yes	54%	60%			
			No	58%	59%			
County	2009	2012	County	2009	2012	County	2009	2012
Antrim	66%	57%	Grand Traverse	56%	62%	Leelanau	42%	50%
Benzie	58%	53%	Kalkaska	74%	57%	Wexford	67%	64%

As shown, a simple majority of most demographic subgroups supported this statement. Support was greatest among respondents 35 years and older, males, property owners, those in household income brackets of \$35,000 a year or more, and those residing in Grand Traverse and Wexford counties.

Figure 7 and Table 6 highlight results for the final question regarding transportation, which asked respondents to choose a top priority between “repairing and improving the roads we have” and “expanding capacity with new and wider roads.”

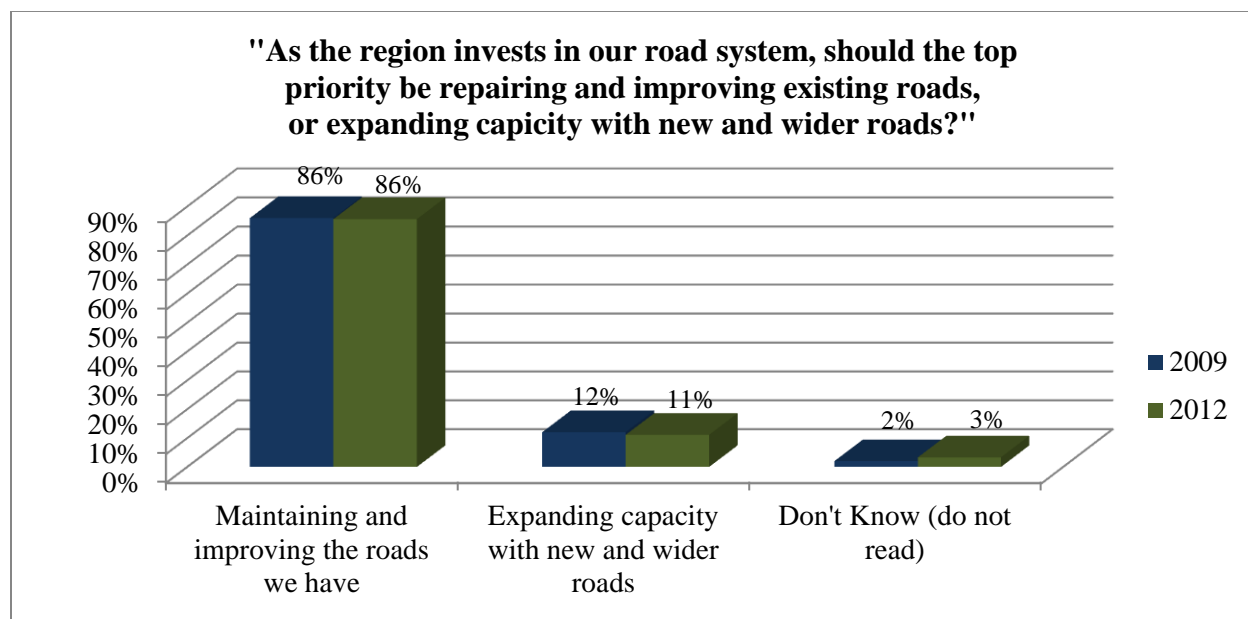


Figure 7

Table 6: Demographic Breakouts: Percentages Prioritizing Maintenance of Existing Roads Over Expanding Capacity With New and Wider Roads

Attribute	Percent		Attribute	Percent		Attribute	Percent	
<i>Age</i>	<i>2009</i>	<i>2012</i>	<i>Education</i>	<i>2009</i>	<i>2012</i>	<i>Employment</i>	<i>2009</i>	<i>2012</i>
18-24	84%	88%	High school diploma or less	85%	87%	Employed full time	90%	89%
25-34	89%	92%	Some college	91%	85%	Employed part time	85%	84%
35-44	80%	91%	Associate's degree	92%	83%	Self-employed	94%	82%
45-54	93%	80%	Bachelor's degree	87%	87%	Retired	86%	83%
55-64	93%	85%	Graduate degree	87%	84%	Laid off/unemployed	94%	94%
65 and up	82%	84%				Person with disabilities	95%	81%
			<i>Household Income</i>	<i>2009</i>	<i>2012</i>	Homemaker	73%	77%
<i>Gender</i>	<i>2009</i>	<i>2012</i>	Less than \$35,000/yr	88%	92%	All others	86%	89%
Male	86%	87%	\$35,000/yr - \$49,999/yr	87%	85%			
Female	89%	84%	\$50,000/yr - \$99,999/yr	89%	81%	<i>Type of Resident</i>		<i>2012</i>
			\$100,000/yr or more	87%	79%	Year round (10-12 months)		85%
<i>Property</i>	<i>2009</i>	<i>2012</i>				Seasonal (9 or fewer months)		93%
Own	88%	85%	<i>Children in the Home</i>	<i>2009</i>	<i>2012</i>			
Rent/Other	86%	87%	Yes	87%	86%			
			No	89%	86%			
<i>County</i>	<i>2009</i>	<i>2012</i>	<i>County</i>	<i>2009</i>	<i>2012</i>	<i>County</i>	<i>2009</i>	<i>2012</i>
Antrim	85%	87%	Grand Traverse	90%	82%	Leelanau	95%	86%
Benzie	81%	91%	Kalkaska	78%	85%	Wexford	89%	88%

As shown, responses varied little between and within demographic subgroups. Eighty-six percent of regional respondents, overall, favored “maintaining and improving the roads we have,” and this statistic increases to 89% if “Don’t Know” responses are excluded. Homemakers and those with household income of \$100,000 a year or more—a very small percent of the respondent pool—were the only groups with less than 80% favoring maintenance and improvement over expansion of the road system.

2.3 Development Patterns

The survey included three agree-disagree questions focused on development preferences, each of which was again derived from the Grand Vision scorecard. The first of these focused on respondents' interest in compact, walkable/bike-friendly residential living, and the region-wide results are shown in Figure 8; fifty-five percent of respondents "agreed somewhat" or "agreed strongly" with the following statement, while 40% expressed some level of disagreement.

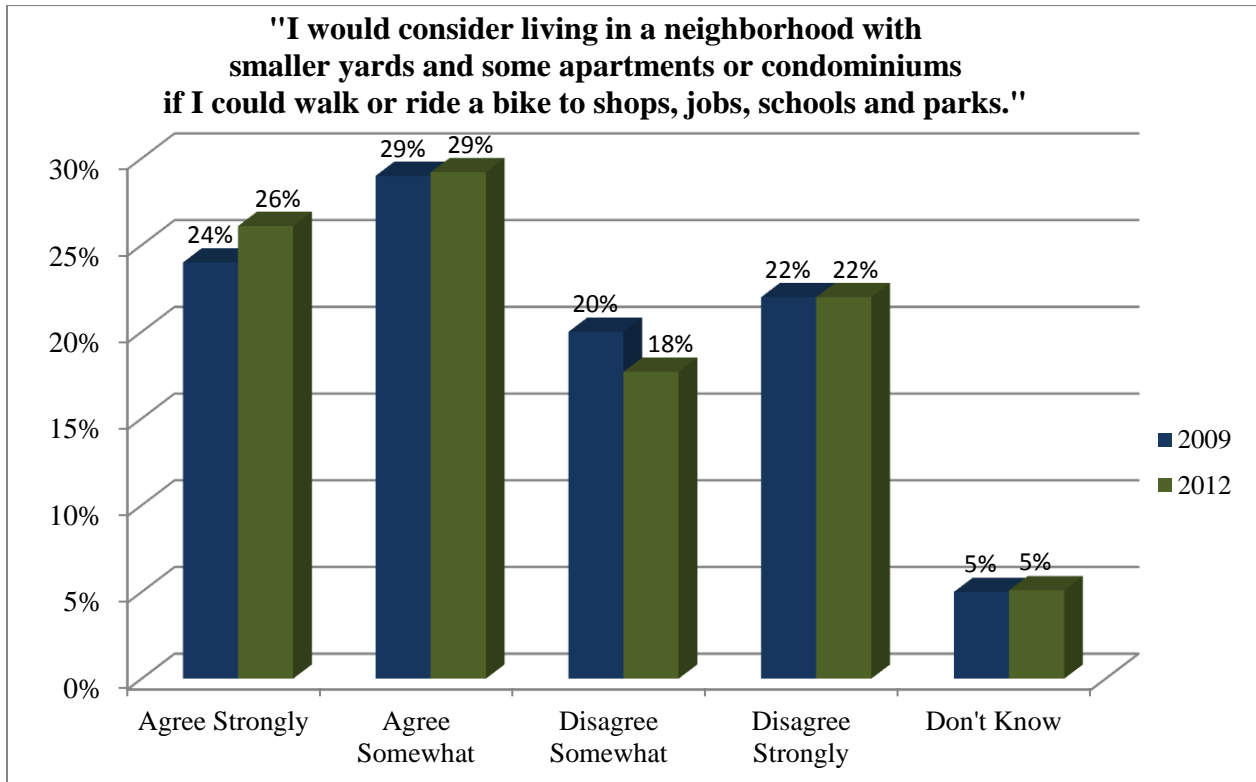


Figure 8

As with questions focused on transportation investment, demographic breakouts focused on respondents' personal characteristics (gender, age, income, employment status, educational attainment, own/rent status, residence status, and presence of children in the home) are presented. Table 7 shows the combined percentages of those agreeing "strongly" and "somewhat" with this statement among several demographic subgroups.

Table 7: Demographic Breakouts: Percentages Agreeing “Strongly” or “Somewhat”

Statement Tested: "I would consider living in a neighborhood with smaller yards and some apartments or condominiums if I could walk or ride a bike to shops, jobs, schools and parks."

Attribute	Percent		Attribute	Percent		Attribute	Percent	
Age	2009	2012	Education	2009	2012	Employment	2009	2012
18-24	63%	62%	High school diploma or less	57%	52%	Employed full time	53%	53%
25-34	47%	54%	Some college	51%	51%	Employed part time	61%	64%
35-44	57%	50%	Associate’s degree	63%	58%	Self-employed	58%	58%
45-54	51%	56%	Bachelor’s degree	61%	57%	Retired	59%	54%
55-64	58%	58%	Graduate degree	50%	65%	Laid off/unemployed	56%	71%
65 and up	59%	53%				Person with disabilities	57%	50%
			Household Income	2009	2012	Homemaker	52%	62%
Gender	2009	2012	Less than \$35,000/yr	60%	52%	All others	58%	48%
Male	52%	50%	\$35,000/yr - \$49,999/yr	55%	61%			
Female	58%	59%	\$50,000/yr - \$99,999/yr	53%	54%	Type of Resident	2012	2012
			\$100,000/yr or more	53%	57%	Year Round (10-12 months)		65%
Property	2009	2012				Seasonal (9 or fewer months)		54%
Own	55%	52%	Children in the Home	2009	2012			
Rent/Other	63%	66%	Yes	52%	54%			
			No	58%	56%			
County	2009	2012	County	2009	2012	County	2009	2012
Antrim	50%	60%	Grand Traverse	55%	57%	Leelanau	66%	59%
Benzie	61%	53%	Kalkaska	49%	48%	Wexford	59%	51%

As shown in Table 7, a simple majority of most demographic subgroups supported the statement. Support was less than 50% for those respondents in the “All Other” employment group and for Kalkaska County respondents.

Figure 9 and Table 8 highlight results for the final agree-disagree question regarding development, which asked respondents whether they felt new country homes should be allowed even if they result in infrastructure costs to other regional residents. Fifty-three percent of survey respondents overall agreed with the statement, while 43% expressed disagreement.

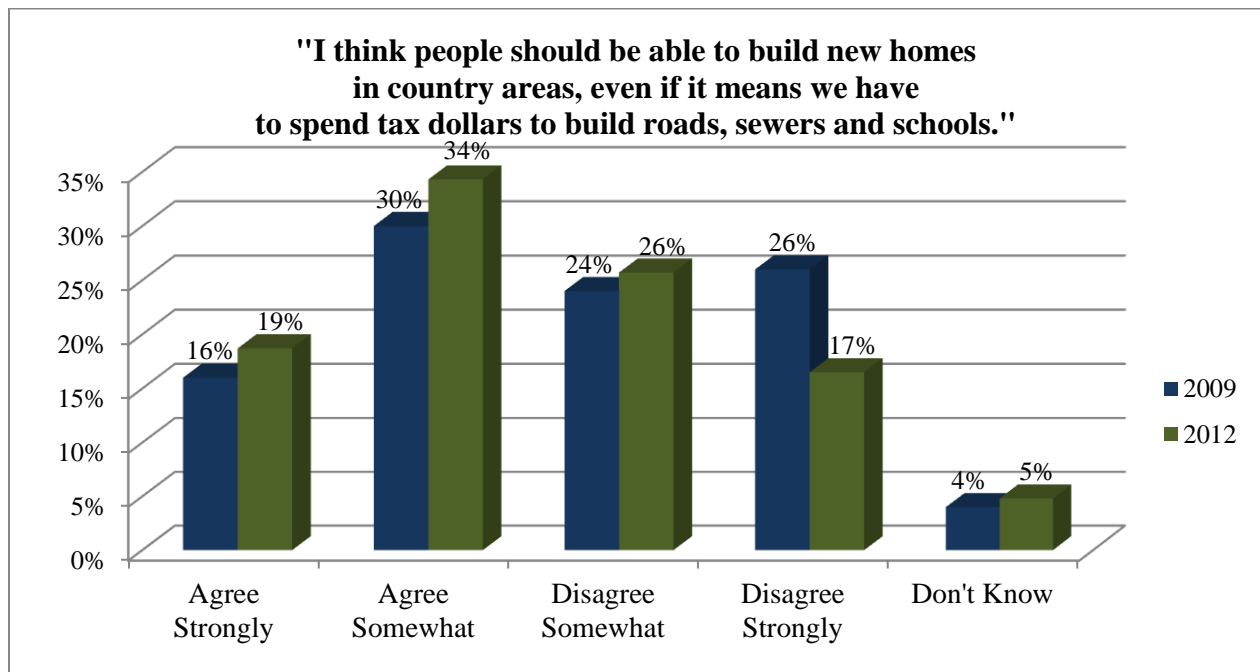


Figure 9

Table 8: Demographic Breakouts: Percentages Agreeing “Strongly” or “Somewhat”

Statement Tested: "I think people should be able to build new homes in country areas, even if it means we have to spend tax dollars to build roads, sewers and schools."

Attribute	Percent		Attribute	Percent		Attribute	Percent	
Age	2009	2012	Education	2009	2012	Employment	2009	2012
18-24	67%	56%	High school diploma or less	46%	55%	Employed full time	48%	58%
25-34	59%	64%	Some college	53%	52%	Employed part time	55%	47%
35-44	45%	56%	Associate’s degree	55%	61%	Self-employed	59%	45%
45-54	51%	56%	Bachelor’s degree	51%	51%	Retired	44%	49%
55-64	45%	48%	Graduate degree	37%	45%	Laid off/unemployed	44%	65%
65 and up	48%	51%				Person with disabilities	50%	53%
			Household Income	2009	2012	Homemaker	53%	46%
Gender	2009	2012	Less than \$35,000/yr	48%	53%	All others	62%	52%
Male	46%	51%	\$35,000/yr - \$49,999/yr	54%	56%			
Female	51%	55%	\$50,000/yr - \$99,999/yr	48%	54%	Type of Resident		2012
			\$100,000/yr or more	48%	46%	Year round (10-12 months)		54%
Property	2009	2012	Children in the Home	2009	2012	Seasonal (9 or fewer months)		43%
Own	49%	53%	Yes	51%	58%			
Rent/Other	52%	54%	No	48%	51%			
County	2009	2012	County	2009	2012	County	2009	2012
Antrim	56%	52%	Grand Traverse	42%	50%	Leelanau	47%	54%
Benzie	50%	47%	Kalkaska	62%	67%	Wexford	47%	53%

As shown, there was some variation on this issue based on the respondents’ personal situations and attributes. Respondents were more likely to agree that “people should be able to build new homes in country areas, even if there are associated infrastructure costs” if they were between 25 and 34 years of age; if they were laid off or unemployed; if they had earned an Associate’s degree and/or if they reside in Kalkaska County.

2.4 Exploring a Broad Regional Vision

The survey included two questions that explored elements of a broad vision for the region. These focused on the importance of vibrant downtowns and the importance of preserving the region’s working lands, environment, and scenic qualities. Figure 10 and Table 9 highlight the results for the first question, focused on downtown areas.

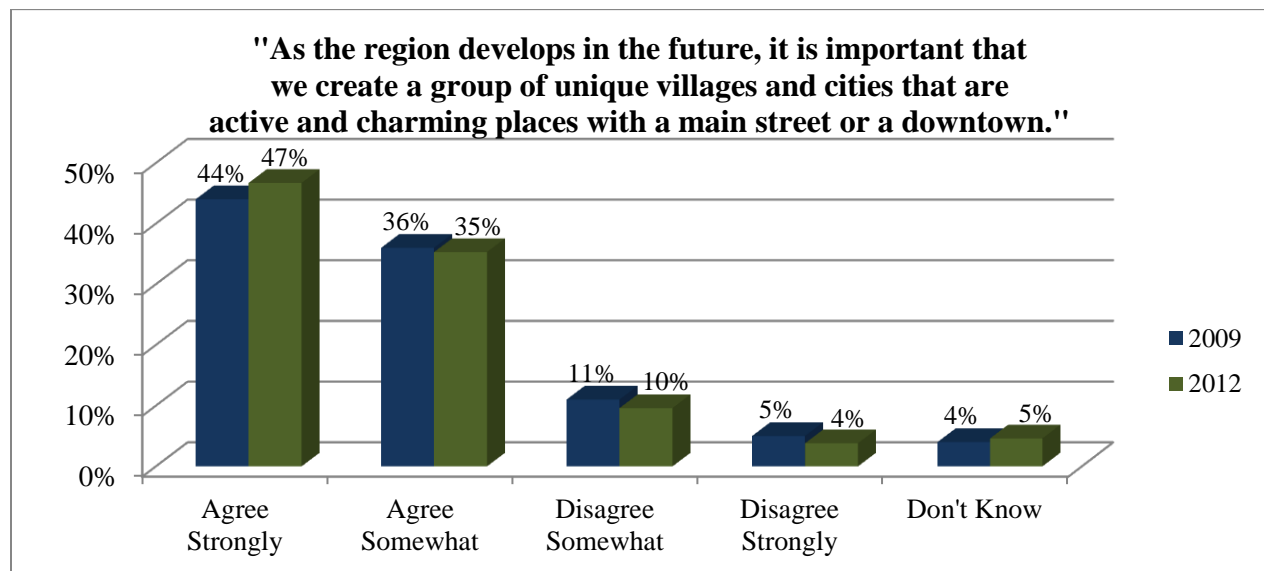


Figure 10

Table 9: Demographic Breakouts: Percentages Agreeing “Strongly” or “Somewhat”

Statement Tested: "As the region develops in the future, it is important that we create a group of unique villages and cities that are active and charming places with a main street or a downtown."

Attribute	Percent		Attribute	Percent		Attribute	Percent	
Age	2009	2012	Education	2009	2012	Employment	2009	2012
18-24	95%	85%	High school diploma or less	78%	76%	Employed full time	85%	87%
25-34	84%	82%	Some college	80%	82%	Employed part time	94%	84%
35-44	87%	88%	Associate’s degree	88%	84%	Self-employed	80%	81%
45-54	86%	83%	Bachelor’s degree	83%	86%	Retired	75%	79%
55-64	77%	82%	Graduate degree	78%	87%	Laid off/unemployed	59%	81%
65 and up	72%	78%				Person with disabilities	79%	81%
			Household Income	2009	2012	Homemaker	81%	85%
Gender	2009	2012	Less than \$35,000/yr	74%	78%	All others	85%	70%
Male	82%	84%	\$35,000/yr - \$49,999/yr	88%	83%			
Female	80%	81%	\$50,000/yr - \$99,999/yr	79%	83%	Type of Resident		2012
			\$100,000/yr or more	86%	91%	Year round (10-12 months)		82%
Property	2009	2012	Children in the Home	2009	2012	Seasonal (9 or fewer months)		79%
Own	80%	81%	Yes	86%	85%			
Rent/Other	83%	86%	No	78%	81%			
						County	2009	2012
County	2009	2012	County	2009	2012	Grand Traverse	84%	79%
Antrim	84%	85%	Kalkaska	81%	81%	Leelanau	85%	78%
Benzie	82%	88%				Wexford	86%	86%

As shown, all demographic subgroups supported this vision statement. Figure 11 shows the results for the second agree-disagree question, focused on resource and land preservation.

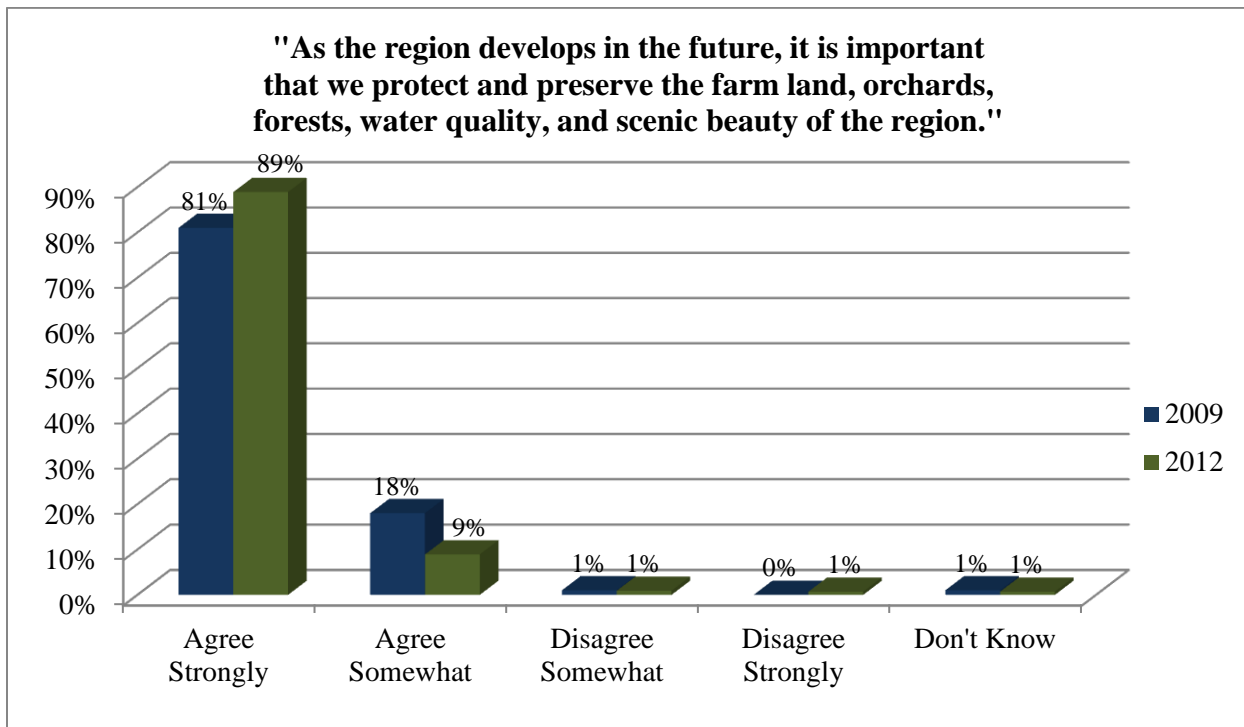


Figure 11

Of the 583 area residents who responded to the survey, five “disagreed somewhat” and four “disagreed strongly” with this statement, while four indicated “Don’t Know.” Given the overwhelming support for this principle, no demographic analysis was conducted.

2.5 Scenario Analysis

As in the Grand Vision scorecard process, survey participants were presented/read a list of four possible future scenarios for regional development and asked to select the one that they personally preferred. The specific vision descriptions provided for survey participants were shorter than those used in the Grand Vision scorecard process due to concerns about respondent fatigue—specifically, concerns that respondents would not be able to process the amount of description and verbiage used in the written scorecard. The verbatim descriptions used in the telephone survey were as follows:

Vision A: Future growth will follow the existing trend of widely spaced development in rural or country areas. Most transportation spending will be dedicated to new and widened roads.

Vision B: Future growth will occur in rural or country areas with new homes being clustered together to maximize open space. Most transportation spending will be dedicated to new and widened roads with limited investment in biking and walking trails.

Vision C: Future growth will occur primarily in the region's cities and villages, with large amounts of open space preserved in country areas. There will be some investment in biking and walking trails, regional bus service, and some spending on new and wider roads.

Vision D: Future growth will occur primarily in Traverse City and Cadillac, with large amounts of open space preserved in country areas. Transportation spending will include investment in expanded bus service, sidewalks, and biking paths in those two main cities, with limited investment in new and wider roads in the broader region.

Figure 12 highlights regional results. A simple majority (54%) of regional respondents preferred Option C, while 28% preferred Option D. There was little support for options A or B. Table 10 highlights results for the demographics explored.

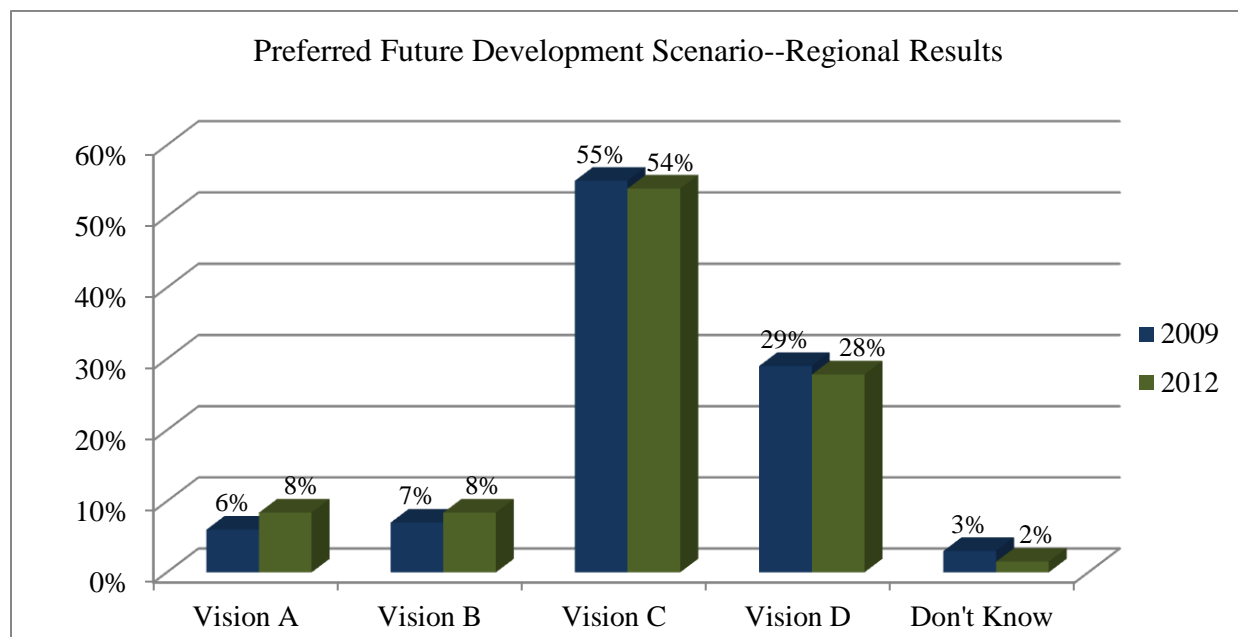


Figure 12

Table 10: Demographic Breakouts: Scenario Selections

Attribute	% “C”	% “C”	% “D”	% “D”	Attribute	% “C”	% “C”	% “C”	% “D”	Attribute	% “C”	% “C”	% “D”	% “D”
Age	2009	2012	2009	2012	Education	2009	2012	2009	2012	Employment	2009	2012	2009	2012
18-24	68%	32%	21%	44%	High school diploma or less	60%	46%	24%	37%	Employed full time	59%	57%	26%	24%
25-34	60%	56%	35%	30%	Some college	50%	55%	40%	26%	Employed part time	58%	61%	36%	35%
35-44	59%	54%	26%	23%	Associate’s degree	55%	54%	32%	30%	Self-employed	50%	50%	36%	37%
45-54	50%	58%	38%	29%	Bachelor’s degree	54%	59%	35%	25%	Retired	56%	59%	31%	25%
55-64	54%	56%	33%	27%	Graduate degree	60%	65%	28%	28%	Laid off/unemployed	45%	40%	39%	30%
65 and up	58%	57%	30%	28%						Person with disabilities	52%	53%	48%	33%
					Household Income	2009	2012	2009	2012	Homemaker	55%	44%	36%	38%
Gender	2009	2012	2009	2012	Less than \$35,000/yr	53%	49%	33%	32%	All others	42%	36%	33%	41%
Male	54%	50%	29%	28%	\$35,000/yr - \$49,999/yr	58%	64%	30%	23%					
Female	56%	58%	33%	28%	\$50,000/yr - \$99,999/yr	59%	56%	29%	28%	Type of Resident		2012		2012
					\$100,000/yr or more	50%	62%	40%	23%	Year round (10-12 months)		54%		29%
Property	2009	2012	2009	2012	Children in the Home	2009	2012	2009	2012	Seasonal (9 or fewer months)		70%		15%
Own	57%	57%	31%	26%	Yes	57%	49%	32%	32%					
Rent/Other	44%	49%	44%	34%	No	55%	57%	32%	27%					
County	2009	2012	2009	2012	County	2009	2012	2009	2012	County	2009	2012	2009	2012
Antrim	63%	57%	19%	23%	Grand Traverse	62%	54%	28%	30%	Leelanau	66%	59%	21%	26%
Benzie	62%	68%	28%	18%	Kalkaska	60%	58%	27%	21%	Wexford	33%	35%	52%	48%

As shown, within most identified groups, the regional pattern applies: the greatest proportion of respondents preferred Option C, while generally the second largest group preferred Option D, and few favored options A or B. Groups that varied included Wexford County respondents, with 48% opting for vision D and 35% for vision C; 18-24 year old respondents, with 44% opting for vision D and 32% for vision C; and respondents with an employment status “all other-collapsed with full-time student,” with 41% opting for vision D and 36% for vision C.

Additional analysis of the scenario choices confirmed a statistically significant interaction by county: Wexford County respondents were more likely than would be statistically expected to prefer Option D (48%), while Benzie County respondents were more likely than would be statistically expected to prefer Option C (68%).

2.6 Perceptions of the Grand Vision Process

The survey included three questions focused on the perceptions of the Grand Vision process. The results of these questions are displayed in Table 11. The table also provides results for three subgroups: those with prior involvement in the Grand Vision process; those aware, but not previously involved, in the Grand Vision; and those without prior awareness of the Grand Vision process.

Table 11: Survey Responses Related to the Grand Vision Process										
Overall and by Subgroups	Responses									
	<i>Agree Strongly</i>		<i>Agree Somewhat</i>		<i>Disagree Somewhat</i>		<i>Disagree Strongly</i>		<i>Don't Know*</i>	
“I support the idea of my community, along with the region’s villages, cities, townships, and counties, working together to plan for future growth.”										
	2009	2012	2009	2012	2009	2012	2009	2012	2009	2012
Overall	69.9%	66.2%	25.1%	29.0%	2.4%	2.9%	1.2%	0.9%	1.4%	1.0%
<i>Past involvement in the Grand Vision</i>	76.2%	76.7%	21.0%	21.7%	1.0%	0.0%	1.9%	0.0%	0.0%	1.7%
<i>Heard of Grand Vision, but not involved</i>	73.3%	66.3%	23.8%	27.6%	1.0%	4.1%	1.4%	1.5%	0.5%	0.5%
<i>No prior awareness of the Grand Vision</i>	64.6%	64.2%	27.7%	31.2%	4.4%	2.8%	0.7%	0.6%	2.6%	1.2%
“To help create a future that I want, I want my local elected officials to participate in the Grand Vision.”										
	2009	2012	2009	2012	2009	2012	2009	2012	2009	2012
Overall	69.4%	59.7%	23.4%	31.0%	2.5%	5.1%	2.2%	2.2%	2.4%	1.9%
<i>Past involvement in the Grand Vision</i>	76.9%	68.3%	14.4%	26.7%	2.9%	3.3%	1.9%	0.0%	3.8%	1.7%
<i>Heard of Grand Vision, but not involved</i>	66.2%	62.8%	27.6%	27.6%	2.9%	5.1%	1.9%	4.1%	1.4%	0.5%
<i>No prior awareness of the Grand Vision</i>	69.0%	56.3%	23.6%	33.9%	2.2%	5.5%	2.6%	1.5%	2.6%	2.8%
“I am interested in helping my community to create our future together as part of the Grand Vision.”										
	2009	2012	2009	2012	2009	2012	2009	2012	2009	2012
Overall	41.8%	35.3%	47.0%	45.8%	5.4%	10.8%	2.5%	4.6%	3.3%	3.4%
<i>Past involvement in the Grand Vision</i>	52.4%	56.7%	42.9%	31.7%	2.9%	6.7%	0.0%	1.7%	1.9%	3.3%
<i>Heard of Grand Vision, but not involved</i>	40.0%	31.6%	47.6%	43.4%	6.2%	13.8%	3.8%	7.7%	2.4%	3.6%
<i>No prior awareness of the Grand Vision</i>	39.0%	33.6%	47.8%	49.8%	5.9%	9.8%	2.6%	3.4%	4.8%	3.4%

* “Don’t know” responses were recorded when offered, but were not articulated as a response option by interviewers.

Table 11 shows, based upon the statements assessed, the Grand Vision process has support among survey participants. Support and interest tended to be highest among those with past involvement, most notably with regard to interest in helping ones community. However, those without past involvement generally expressed support for the process as well.

2.6 Quality of Life and Development

The next series of survey items addressed survey respondents' rankings with regard to the "Ladder of Life," future quality of life for children/grandchildren, and direction of community. The introduction and items, as presented to survey respondents, follow. Results are highlighted in Figures 13 – 16.

The following questions ask about your area of northwest Lower Michigan. The county you live in is part of an area we will be referring to as the Grand Traverse region.

"Thinking about the overall quality of life here in the Grand Traverse region, please imagine a ladder with ten steps representing the "Ladder of Life." Let's suppose the top of the ladder, the tenth step, represents the best possible life for you: and the bottom, the first step, the worst possible life for you."

- On a scale of 1 to 10, which step of the ladder do you personally stand at the present time?
- Again, on which step would you say you stood five years ago? (Regardless of whether or not you lived in Grand Traverse region five years ago.)
- And, just as your best guess, on which step will you stand in the future, say five years from now?

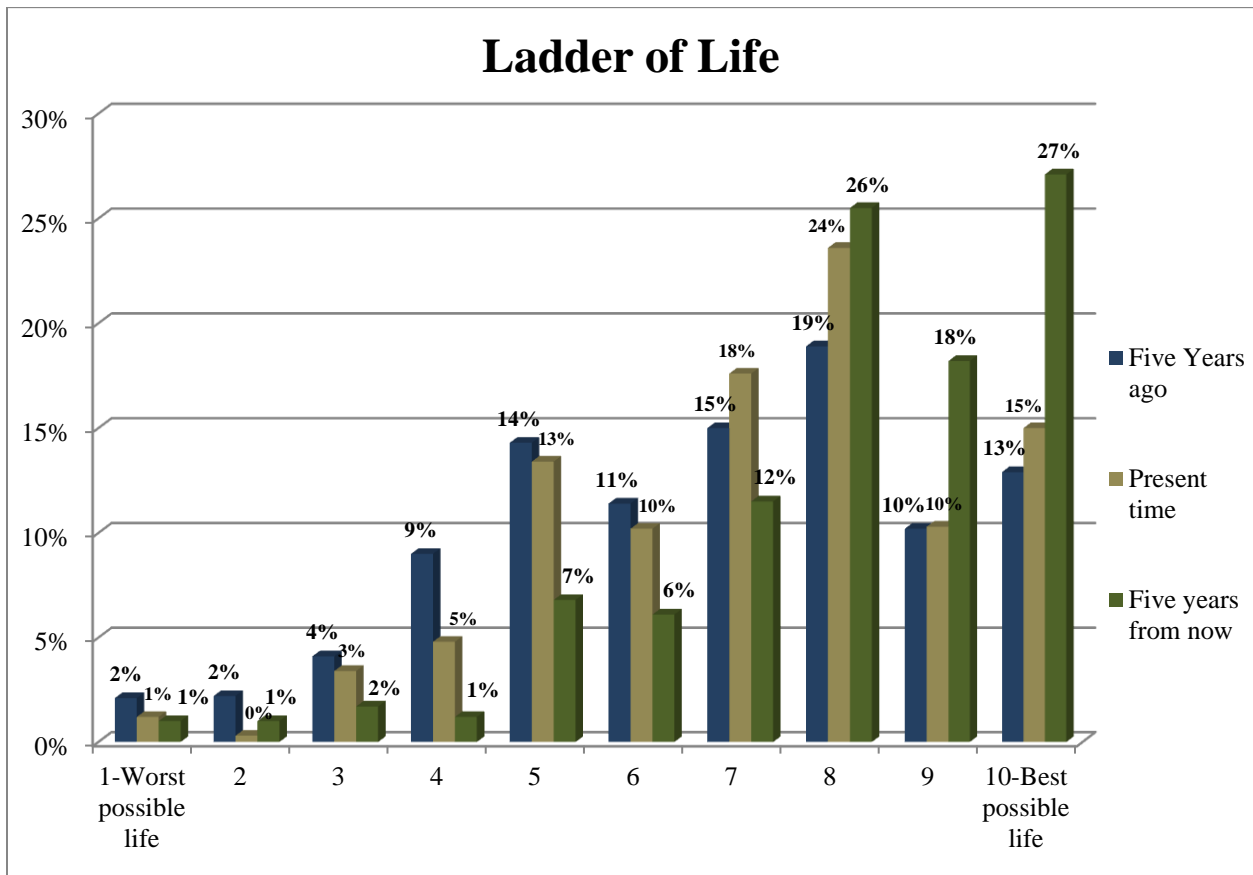


Figure 13

As shown, the majority of survey respondents assigned a rating of six to ten (the high end of the scale) for each point in time; eighty-eight percent of respondents indicated that five years from now they expect to be on a step of six or higher. Average ratings for each point in time are as follows: current step mean=7.15; five years ago mean=6.71; five years in the future mean=8.02. Results collapsed into two categories consisting of ratings 1-5 and 6-10 are displayed in Figure 14.

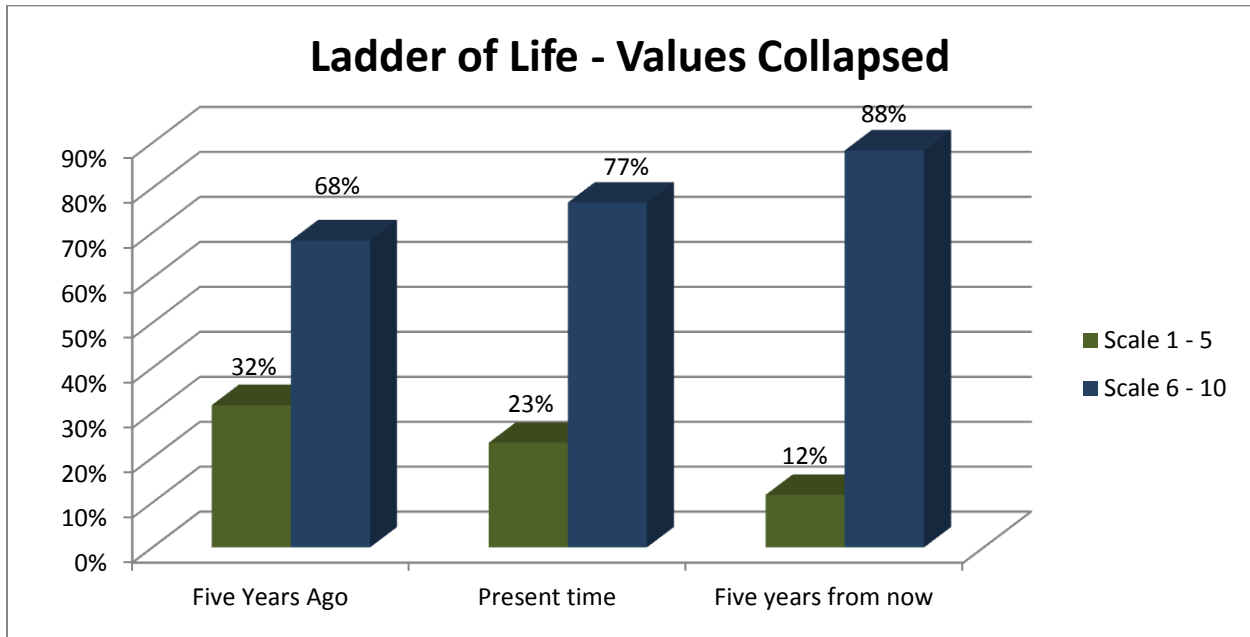


Figure 14

Quality of life was additionally assessed with the following item, “Thinking about the quality of life that will be here for you or your friends’ children and grandchildren...do you see their quality of life in the Grand Traverse region increasing or decreasing in the future?”

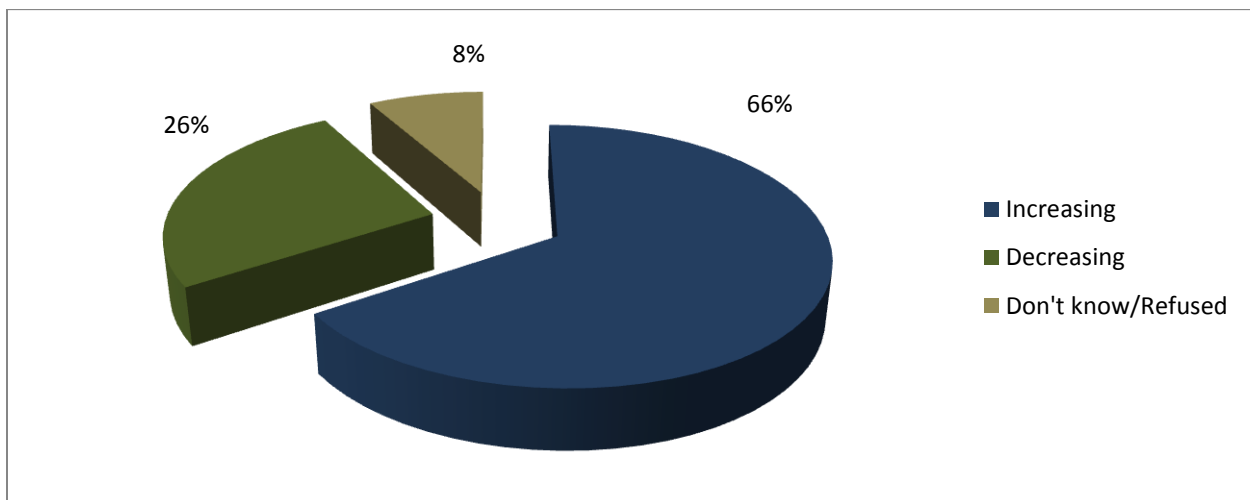


Figure 15

As shown, the majority of respondents (66%) indicated they see the quality of life increasing, while 26% felt quality of life would decrease. Additional analysis by demographic subgroup found that respondents in the following groups were statistically more likely to indicate quality of life will decrease: those in the less than \$35,000 income bracket, those with a high school degree or less, and males.

Respondents were then asked, “On another subject, do you feel things in your own community today are going in the right direction or do you feel things have pretty seriously gotten off on the wrong track?” Figure 16 displays results.

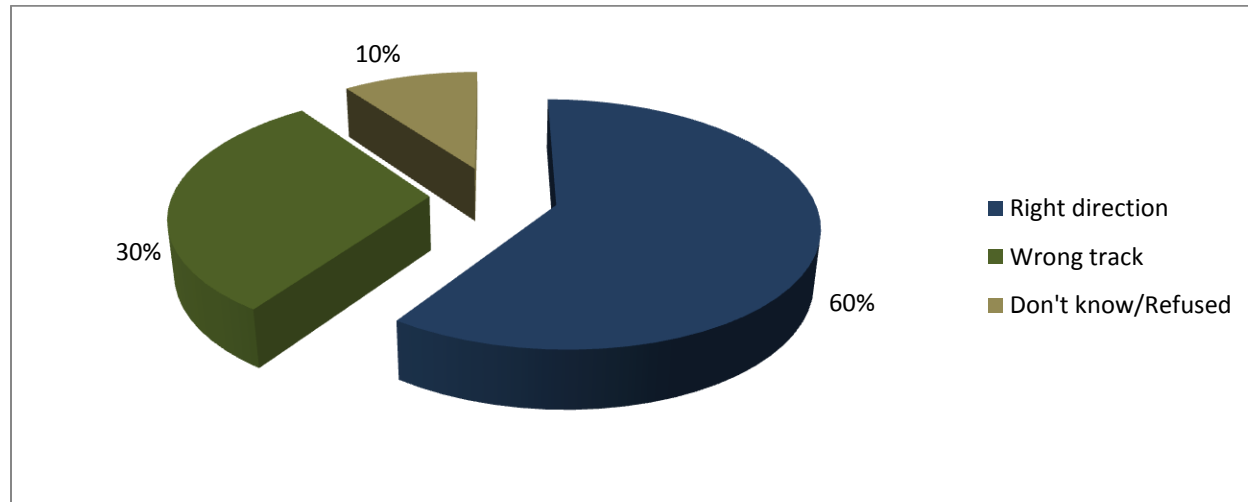


Figure 16

As shown, the majority of respondents (60%) indicated they feel things in their community are going in the right direction, while 30% feel their community is on the wrong track. Additional analysis by demographic subgroup found that Grand Traverse and Leelanau County respondents were statistically more likely to indicate their community is going in the right direction, while those in Benzie and Kalkaska Counties were more likely to feel that things in their community are on the wrong track.

2.7 Participant Demographics

Demographic information collected from survey participants included county of residence, household income, educational attainment, employment status, own/rent status, age range, gender, and year-round/seasonal residency.

County quotas were established to ensure adequate representation of each of the overall region’s six counties. Table 12 displays final counts.

Table 12: County of Residence				
County	Frequency		Percent	
	2009	2012	2009	2012
Antrim	75	75	13.0%	12.9%
Benzie	76	76	13.1%	13.0%
Grand Traverse	200	200	34.6%	34.3%
Kalkaska	77	75	13.3%	12.9%
Leelanau	75	80	13.0%	13.7%
Wexford	75	77	13.0%	13.2%
<i>Total</i>	<i>578</i>	<i>583</i>	<i>100.0%</i>	<i>100.0%</i>

Table 13 displays respondents' household income brackets. As shown, more than half of respondents reported an annual household income of less than \$50,000 per year.

Table 13: Household Annual Income Bracket				
Household Income Bracket	Frequency		Percent	
	2009	2012	2009	2012
Less than \$35,000	160	184	27.7%	31.6%
\$35,000 - \$49,999	121	126	20.9%	21.6%
\$50,000 - \$99,999	179	175	31.0%	30.0%
\$100,000 or More	78	65	13.5%	11.1%
Refused/Unknown	40	33	6.9%	5.7%
<i>Total</i>	<i>578</i>	<i>583</i>	<i>100.0%</i>	<i>100.0%</i>

According to U. S. Census Bureau 2007 – 2011 American Community Survey 5-Year Estimates, the median household income in counties represented in the survey were: Antrim County - \$42,440; Benzie County - \$47,017; Grand Traverse County - \$50,629; Kalkaska County - \$39,130; Leelanau County - \$55,247 and Wexford County - \$42,209. On a bracket-by-bracket basis, a comparison of survey results to the household income distribution for the six counties with this data suggests that the survey respondents may somewhat underrepresent those in the lowest income bracket.

Table 14 shows respondents' reported levels of educational attainment. In comparison to data reported through the U. S. Census, survey participants did reveal higher levels of educational attainment, on average, than the population at large. Census data for the six counties with estimates available for 2007-2011 show percentages of county-level population aged 25 and older with a high school diploma/GED or less ranging from 29.5% (Leelanau County) to 57.7% (Wexford County), whereas those in this educational classification comprised only 24.9% of survey respondents.

Table 14: Highest Level of Education Attained				
Response	Frequency		Percent	
	2009	2012	2009	2012
Some High School or Less	13	12	2.2%	2.1%
High School Diploma or GED	142	133	24.6%	22.8%
Some College	145	155	25.1%	26.6%
Two-Year or Associate's Degree	75	80	13.0%	13.7%
Four-Year or Bachelor's Degree	114	131	19.7%	22.5%
Master's, Doctoral, or Professional Degree	87	69	15.1%	11.8%
Refused/Unknown	2	3	0.3%	0.05%
<i>Total</i>	<i>578</i>	<i>583</i>	<i>100.0%</i>	<i>100.0%</i>

Table 15 displays respondents' employment status. Thirty-two percent reported full-time employment, while 14.2% reported part-time or self-employment. Over 21% indicated they were unemployed or out of the labor force for reasons other than retirement, while 32% were retired.

Table 15: Primary Employment Status				
Response	Frequency		Percent	
	2009	2012	2009	2012
Full-Time Employee	191	187	33.0%	32.1%
Part-Time Employee	56	45	9.7%	7.7%
Self-Employed	51	38	8.8%	6.5%
Retired	173	186	29.9%	31.9%
Laid Off	12	4	2.1%	0.7%
Unemployed	21	27	3.6%	4.6%
Disabled	21	36	3.6%	6.2%
Full-Time Student	3	13	0.5%	2.2%
Homemaker	34	35	5.9%	6.0%
Other	11	9	1.9%	1.5%
Refused/Unknown	5	3	0.9%	0.5%
<i>Total</i>	<i>578</i>	<i>583</i>	<i>99.9%</i>	<i>100.0%</i>

Table 16 shows respondents' own/rent status. Approximately 77% of survey participants were homeowners, while almost 16% were renters and the remainder had a live-in or other arrangement.

Table 16: Own/Rent Status				
Response	Frequency		Percent	
	2009	2012	2009	2012
Own Home/Property	510	447	88.2%	76.7%
Rent Home/Property	51	92	8.8%	15.8%
Live With a Family Member	10	33	1.7%	5.7%
All Other Living Arrangements	5	8	0.9%	1.3%
Refused/Unknown	2	3	0.3%	0.5%
<i>Total</i>	<i>578</i>	<i>583</i>	<i>99.9%</i>	<i>100.0%</i>

Table 17 highlights survey participant age brackets; approximately 69% of respondents are aged 45 or above. A screen was imposed midway through the survey to exclude potential respondents in the upper age brackets.

Table 17: Age Categories				
Age Category	Frequency		Percent	
	2009	2012	2009	2012
18-24	19	34	3.3%	5.8%
25-34	38	50	6.6%	8.6%
35-44	80	86	13.8%	14.8%
45-54	140	111	24.2%	19.0%
55-64	148	141	25.6%	24.2%
65 and above	149	152	25.8%	26.1%
Refused/unknown	4	9	0.7%	1.5%
<i>Total</i>	<i>578</i>	<i>583</i>	<i>100.0%</i>	<i>100.0%</i>

Additional demographic data includes gender and year-round/seasonal residency status. Survey participants had the following characteristics:

- *Gender*: Male 39.6% (231 respondents), female 60.4% (352 respondents)
- *Residency*: Year-round 95.2% (555 respondents), seasonal 4.8% (28 respondents)