

OTSEGO COUNTY QUALITY OF LIFE ASSESSMENT REPORT

What does it mean to you?





Gallup · Healthways **Well-Being Index®**

- ▣ The **Life Evaluation Index** combines the evaluation of one's present life situation with one's anticipated life situation five years from now.
- ▣ The **Emotional Health Index** is primarily a composite of respondents' daily experiences, asking respondents to think about how they felt yesterday along nine dimensions.
- ▣ The **Physical Health Index** is comprised of questions related to: Body Mass Index, disease burden, sick days, physical pain, daily energy, history of disease and daily health experiences.
- ▣ The **Healthy Behavior Index** includes items measuring life style habits with established relationships to health outcomes.
- ▣ The **Work Environment Index** surveys workers on several factors to gauge their feelings and perceptions about their work environment.
- ▣ The **Basic Access Index** is based on thirteen items measuring resident's access to food, shelter, healthcare and a safe and satisfying place to live.



Gallup · Healthways Well-Being Index®



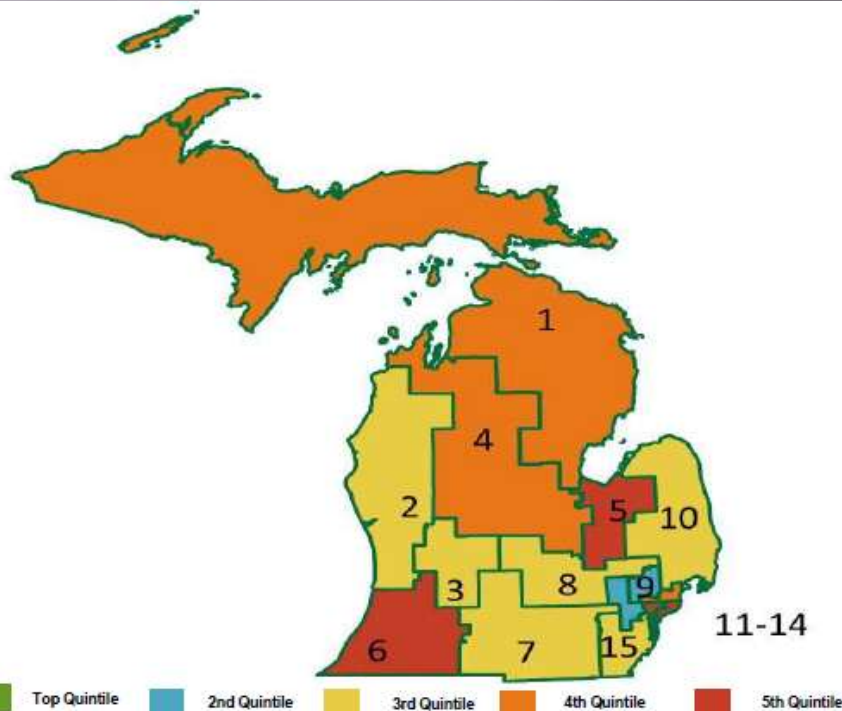
■ Top Quintile
 ■ 2nd Quintile
 ■ 3rd Quintile
 ■ 4th Quintile
 ■ 5th Quintile

	2011	2012
Well-Being Overall	65.3	65.6
Life Evaluation	47.2	48.6
Emotional Health	78.8	78.5
Physical Health	76.0	75.5
Healthy Behavior	61.8	62.8
Work Environment	45.5	46.1
Basic Access	82.5	82.3

2011	2012
37	36
36	29
33	38
37	39
39	35
40	35
23	27



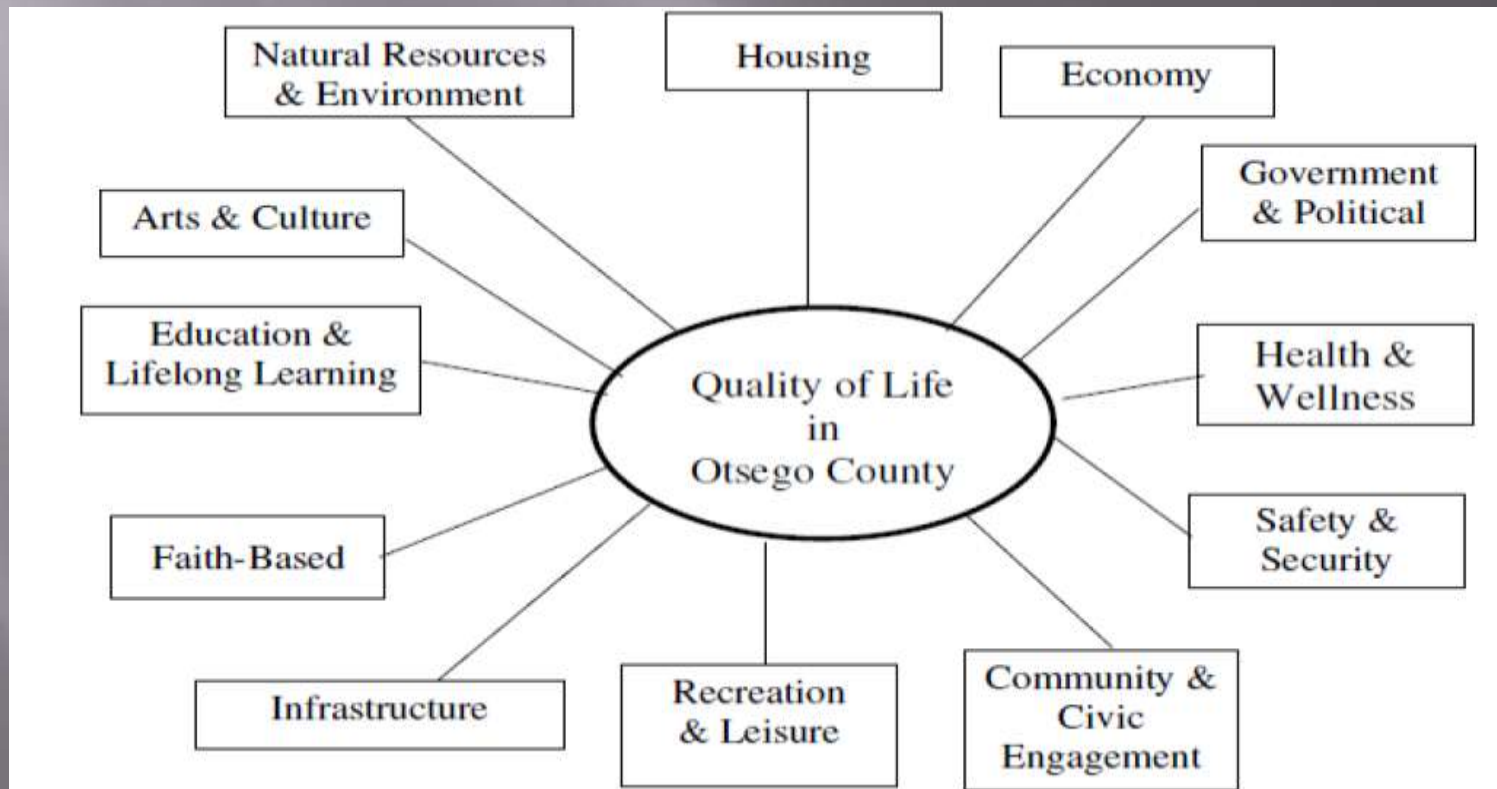
Gallup · Healthways Well-Being Index®



Overall Rank	2012	327
	2011	253
Life Evaluation	2012	344
	2011	406
Emotional Health	2012	261
	2011	106
Physical Health	2012	360
	2011	356
Healthy Behavior	2012	200
	2011	159
Work Environment	2012	336
	2011	137
Basic Access	2012	255
	2011	188

Measuring “Quality of Life”

- ▣ “Report Card” included 12 indicators
- ▣ Took measurable criteria to determine our progress on each “Indicator of a Quality Life”



What Report Card Looks Like

Quality of Life Indicators - 2012 Report Card

Indicators provide a snapshot of measureable variables that can be tracked over time to show the change or direction of our county's progress. Sources of indicators use the same methodology from year to year in collecting and reporting the data so we can compare apples to apples.

Indicator	Prior	Current	Progress
Arts & Culture			
Attendance at the Otsego County Historical Museum	2011 1593	2012 2044	↑
Number of artists in the Gaylord Area Council of Arts (GACA) Juried Fine Arts Exhibit	2011 9	2012 17	↑
Number of musical concerts presented by the Gaylord Community Band plus those sponsored by GACA	2011 10	2012 12	↑
Community & Civic Engagement			
Number of volunteer hours by RSVP and the Volunteer Center of Otsego County combined	2010 48,319	2011 50,918	↑
Total amount awarded in grants by the Otsego County Community Foundation	2010 \$36,612	2011 \$53,466	↑
Percent of survey respondents who agree or strongly agree that our festivals help generate community spirit		2011 87%	Baseline

Next Steps:

- ▣ Use this report and the information it provides to improve our local businesses, organizations, governments and the community at large.
- ▣ To continue evaluating Report Card criteria on a regular basis (1-2 years) to determine if we are improving the Quality of Life in Otsego County.

Gaylord Quality of Life Progress Report

- ▣ Provides you **Market Research** to help identify some of the Opportunities and Threats in the External Environment
 - General Demographic Trends
 - Specific Survey and Focus Group Data
- ▣ Sources of Information
 - Mailed Survey
 - On-Line Survey
 - Youth Input Focus Group
 - Community Focus Groups
 - Experts from other communities
 - Key Indicator “Report Card” Research
- ▣ You can find specific raw data for your industry/situation in the Otsego County Quality of Life Assessment Reports (www.otsego.org/qol/)

Presentation Goal

- ▣ Provide participants with a framework for practical application of “Quality of Life Report” data
- ▣ SWOT is a planning approach to chart a future path for your organization by identifying trends in your organization and in the external environment.

Strengths

Capitalize



Opportunities

Invest

Weakness

Shore Up

Threats

Identify

Internal to your Organization In the External Environment

Internal Analysis

- ▣ Strengths
 - What do you do well?
 - What is your organizations competitive advantage?
- ▣ Weaknesses
 - What areas do you need to improve on?
- ▣ Sources of Analysis
 - Employee Input
 - Customer Feedback
- ▣ Strengths and Weaknesses are in YOUR CONTROL
- ▣ Types of Strengths and Weaknesses
 - Capabilities (skills)
 - Resources (money, brand, building, location)
 - Processes
- ▣ Capitalize on your Strengths
- ▣ Shore up your Weaknesses

External Environment Analysis

- ▣ Opportunities
 - What trends in the world around you can you take advantage of?
- ▣ Threats
 - What areas in the external environment should concern your organization?
- ▣ Sources of Analysis
 - Secondary Data (Market Research)
 - Environmental Scanning
- ▣ Are NOT IN YOUR CONTROL
- ▣ Types of Opportunities and Threats
 - Demographic
 - Economic / Governmental
 - Competitive
- ▣ Invest to take advantage of external Opportunities
- ▣ Identify and prepare for external Threats

Putting SWOT to Work

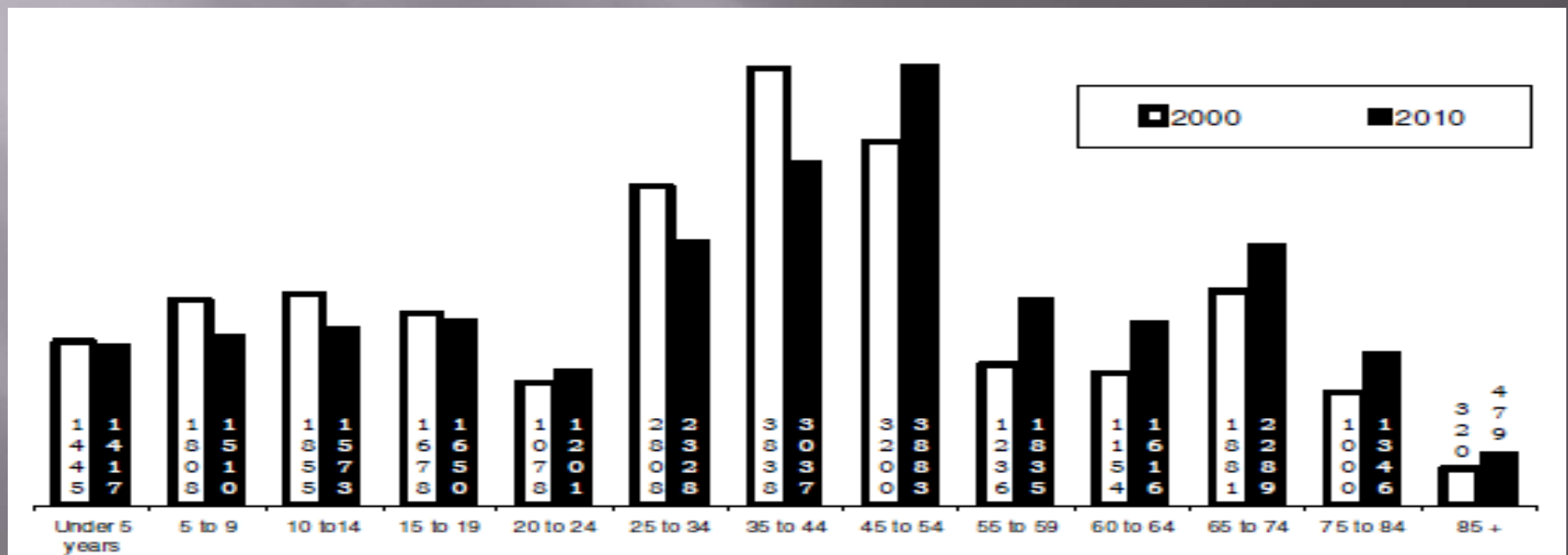
- ▣ After identifying Strengths, Weakness, Opportunities & Threats create a list of ideas and develop into organizational goals
 - Match Strengths of your organization to opportunities in the external environment
 - Develop Organizational Goals and Strategies
 - Are there Opportunities that will offset Threats

OPPORTUNITIES & THREATS

An Analysis of the Otsego County
Quality of Life Assessment

General Findings – Census from 2000 to 2010

- Otsego County population increased by 3.7% while State of Michigan declined 0.6%
- Otsego County population increased by 863 people to 24,164 residents.
- Population under 44 years old decreased by 1,794; over 45 increased by 2,657.**
- Seasonal homes accounted for 4,052 of the 14,731 (27.5%) residences & were not included in census data.

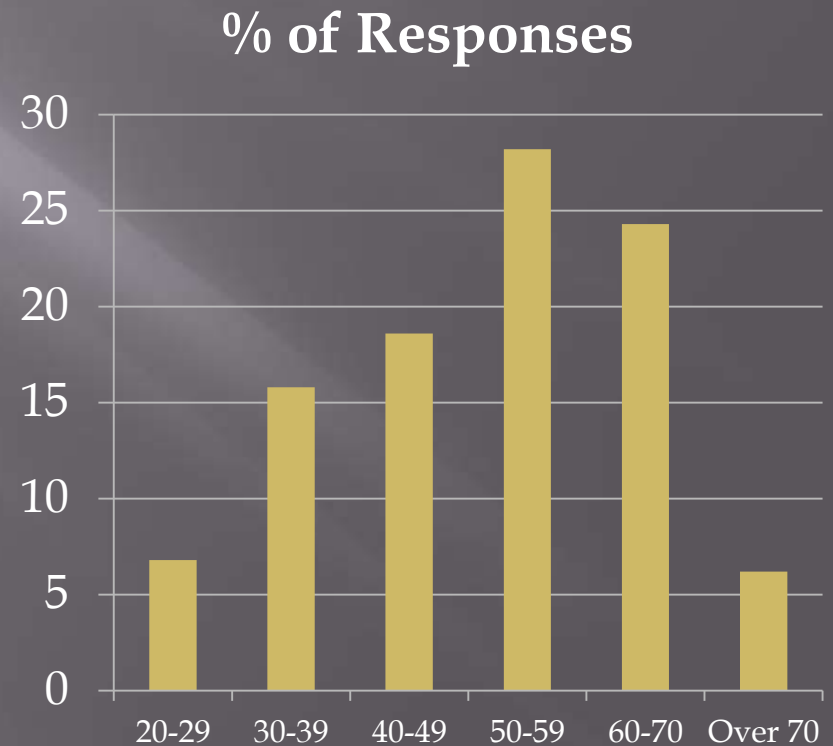
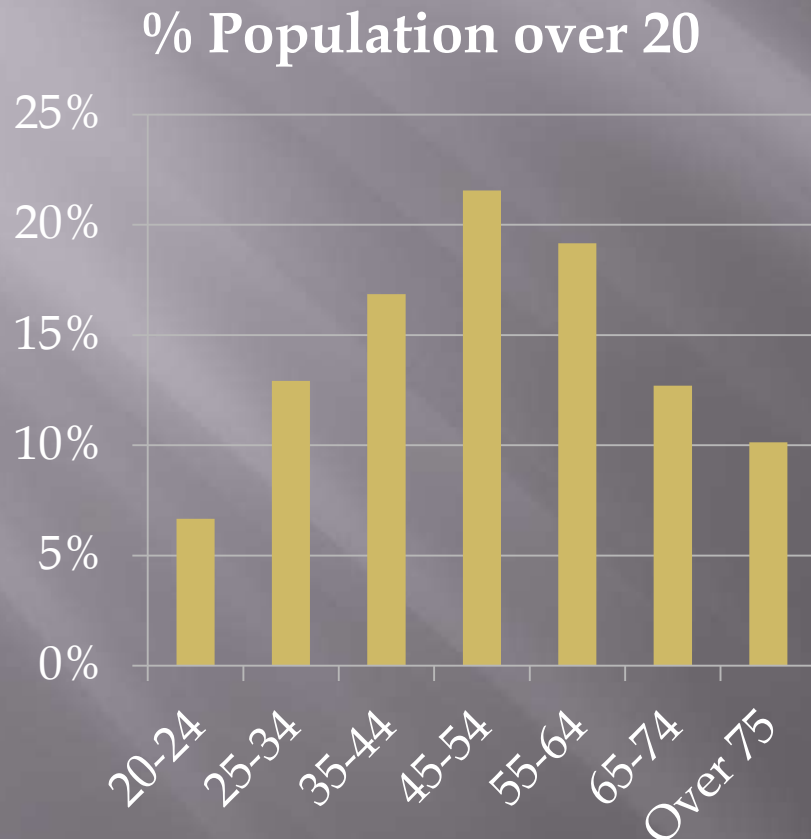


OPPORTUNITY: If you serve an older population, your target market is growing.

Survey Response Representativeness of Population

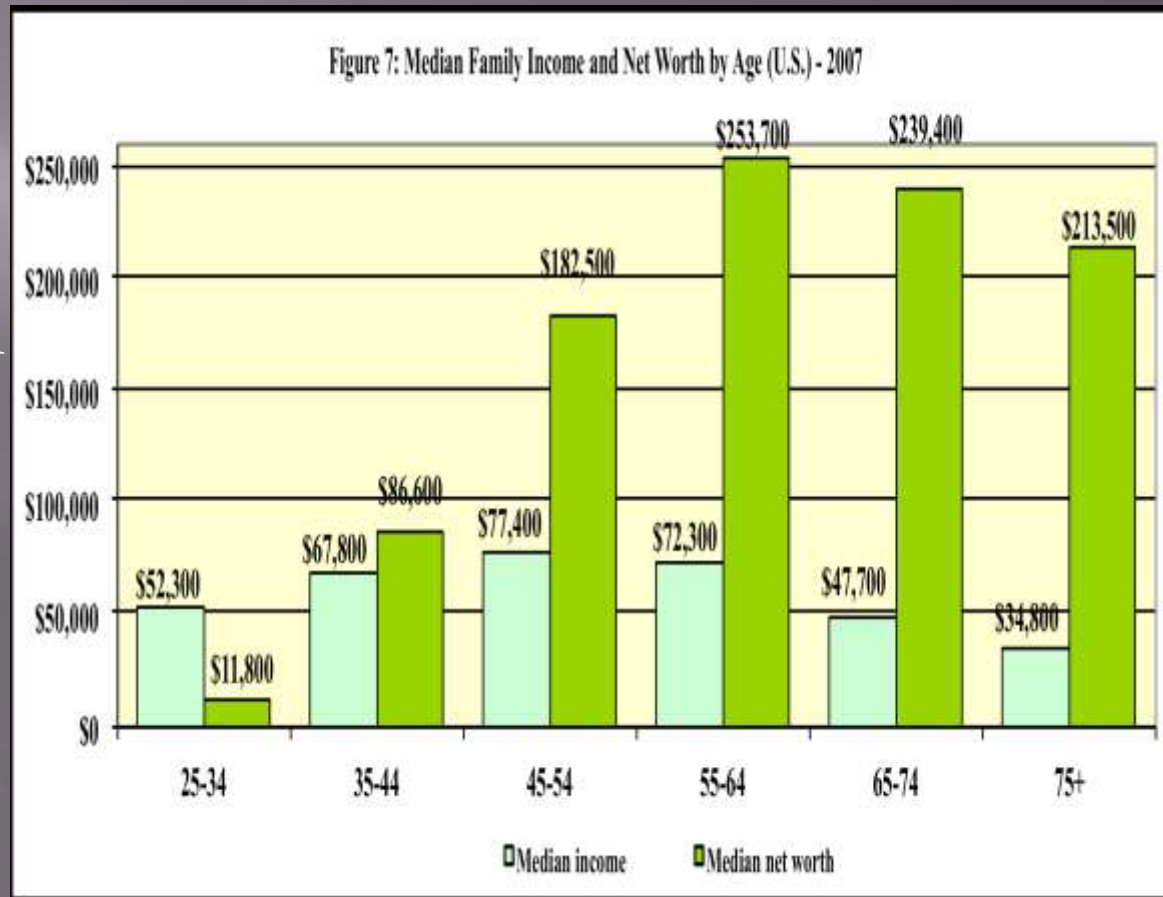
POPULATION BY AGE

SURVEY RESPONSE BY AGE



Opportunity: Senior Market

- ▣ The elderly are not poor.
- ▣ The elderly need only about 60 to 80 percent of former income to maintain their standard of living.
- ▣ Seniors have the greatest accumulation of assets, having fewer dependents, and are given to spend rather than to hold on to assets.



Senior Market Segmentation

- ▣ Two distinct sub-segments seem to exist —
- ▣ the "young old," aged to 74; The young-old are active, vibrant, and healthy.
- ▣ “Old-old,” those 75 and above. The old-old are less healthy, more sedentary, and less sharp in their mental and physical abilities.
- ▣ There are twice as many young-olds as there are old-olds.

Opportunity: Services for Older Citizens

- ▣ Research has found the physical and life style changes of the elderly emphasize they need services over goods. A study of Houston seniors suggested the need for such services as home security, car maintenance and repair, health care and lawn care.
- ▣ Focus group sessions with seniors produced a high incidence of complaints about
 - foods being packed in quantities that are too large for their households.
 - the print used in labels is often hard to read because it is too small or difficult to understand.

Opportunity: Consumer Behavior of Older Citizens

- ▣ Senior women appear fashion conscious with research finding two-thirds of women perceiving themselves as fashion conscious.
- ▣ Elderly women were found to plan their purchases and keep up to date with fashion trends.

Opportunity: Senior Loyalty

- ▣ Studies have found the elderly usually shop near their homes generally because of transportation issues.
- ▣ They also found store loyalty to prevail--especially where store management can offer advice.
- ▣ Elderly with higher incomes and the “Old-old” displayed greater store loyalty.

Opportunity: Senior Focused Customer Service

- ▣ Research found senior shoppers welcome special treatment. Seniors desired
 - special clothing departments,
 - carry-out service for their packages,
 - clerks their own age, and
 - stores showing an explicit interest in retirement age business (such as a "Welcome, Seniors" sign in their window).
- ▣ A study of Florida seniors placed more emphasis on the use of informal sources of communications such as friends than formal sources such as advertising. Thus, a satisfied customer can be a great source of business for retailers due to word-of-mouth communication.

Dispelling Misconceptions of Older Citizens

- ❑ The elderly as a whole are neither in poor physical condition nor financially poor. The "young-old" outnumber the "old-old" two to one and are trying to live life to its fullest.
- ❑ Many seniors are not price conscious and don't seek out discount stores, generics, or special economy packaging to reduce their expenses. In fact, many actually seek out expensive items.
- ❑ Senior women are quite fashion conscious.
- ❑ Instead of their age being a stigma, the elderly welcome being singled out by businesses and having products designed distinctly for them.
- ❑ As shoppers, they are conscientious and prepared.

Opportunity: The Grandparent Economy - Prevalance

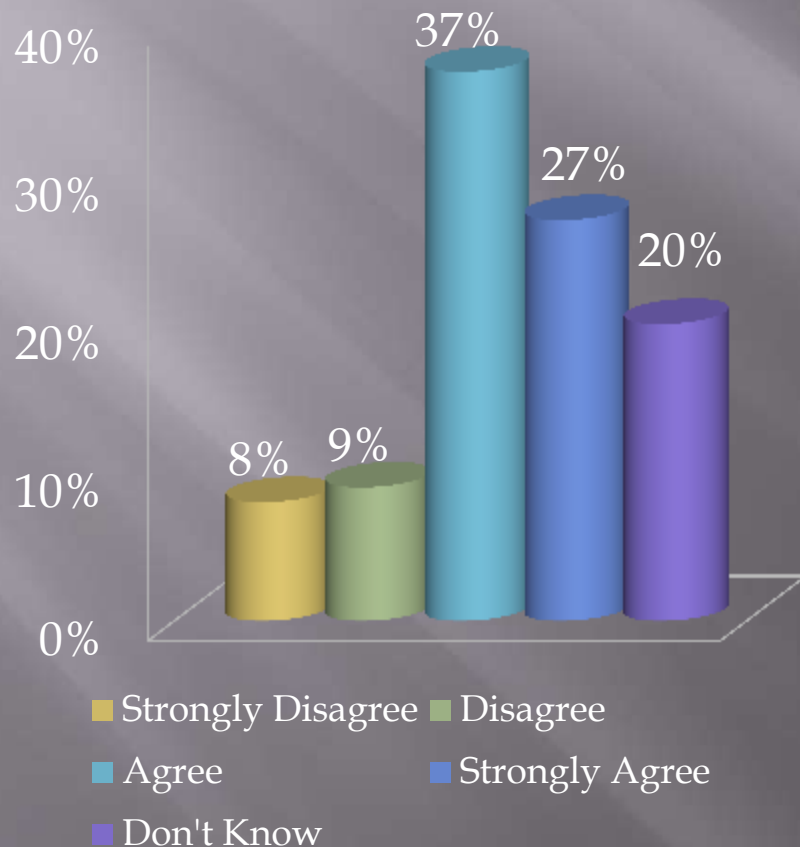
- ▣ Three in every ten adults are grandparents — an all-time high.
- ▣ Grandparents lead 37% of U.S. households, or 44 million households nationwide.
- ▣ Parents first become grandparents at the median age of 50 for women and 54 for men.
- ▣ 54% of grandparents are younger than 65 years old.
- ▣ By 2010, more than half of the grandparent population (51%) will be Baby Boomers (those born between 1946 and 1964) — nearly 60% by 2015.

Opportunity: The Grandparent Economy - Purchasing Power

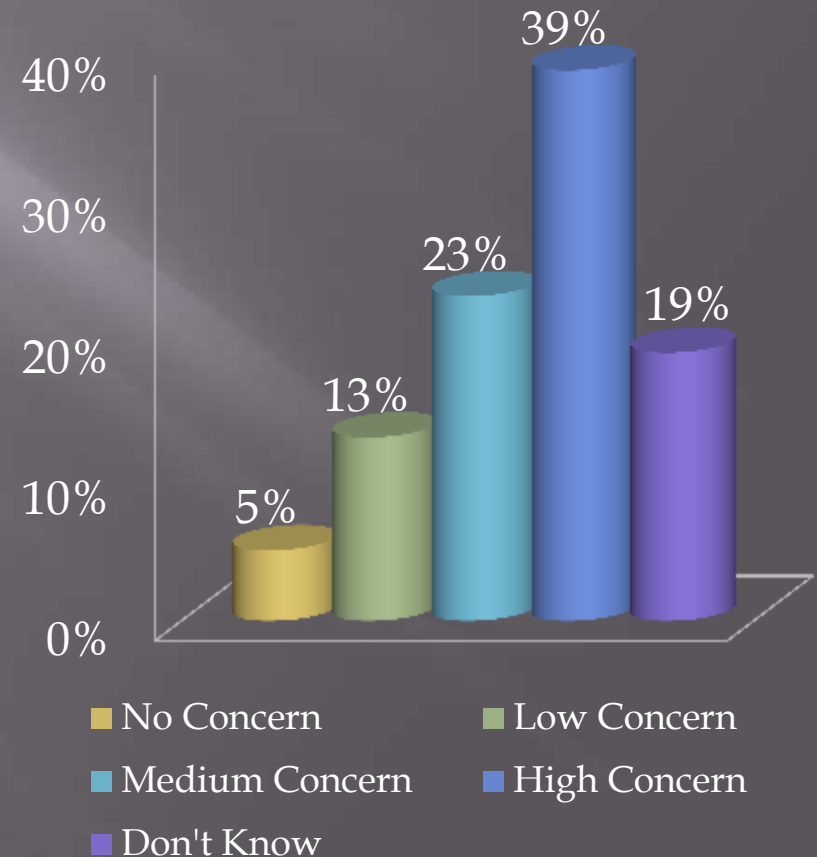
- ▣ Households led by 55- to 64-year-olds have the highest average net worth of any age group at \$254,000.
- ▣ During the past 10 years, the median family income for those 55 to 64 has risen by 12% after adjusting for inflation. The only age group coming close to that is 65- to 74-year-olds, whose income rose an inflation-adjusted 11%.
- ▣ A majority of grandparent-homeowners (55%) do not carry a mortgage, a cost that typically accounts for a hefty proportion of younger homeowners' expenses.

Opportunity: Retirement Years

I PLAN TO SPEND MY RETIREMENT YEARS IN OTSEGO COUNTY



AVAILABILITY OF SERVICES SO SENIOR CITIZENS CAN CONTINUE TO LIVE IN THEIR HOMES



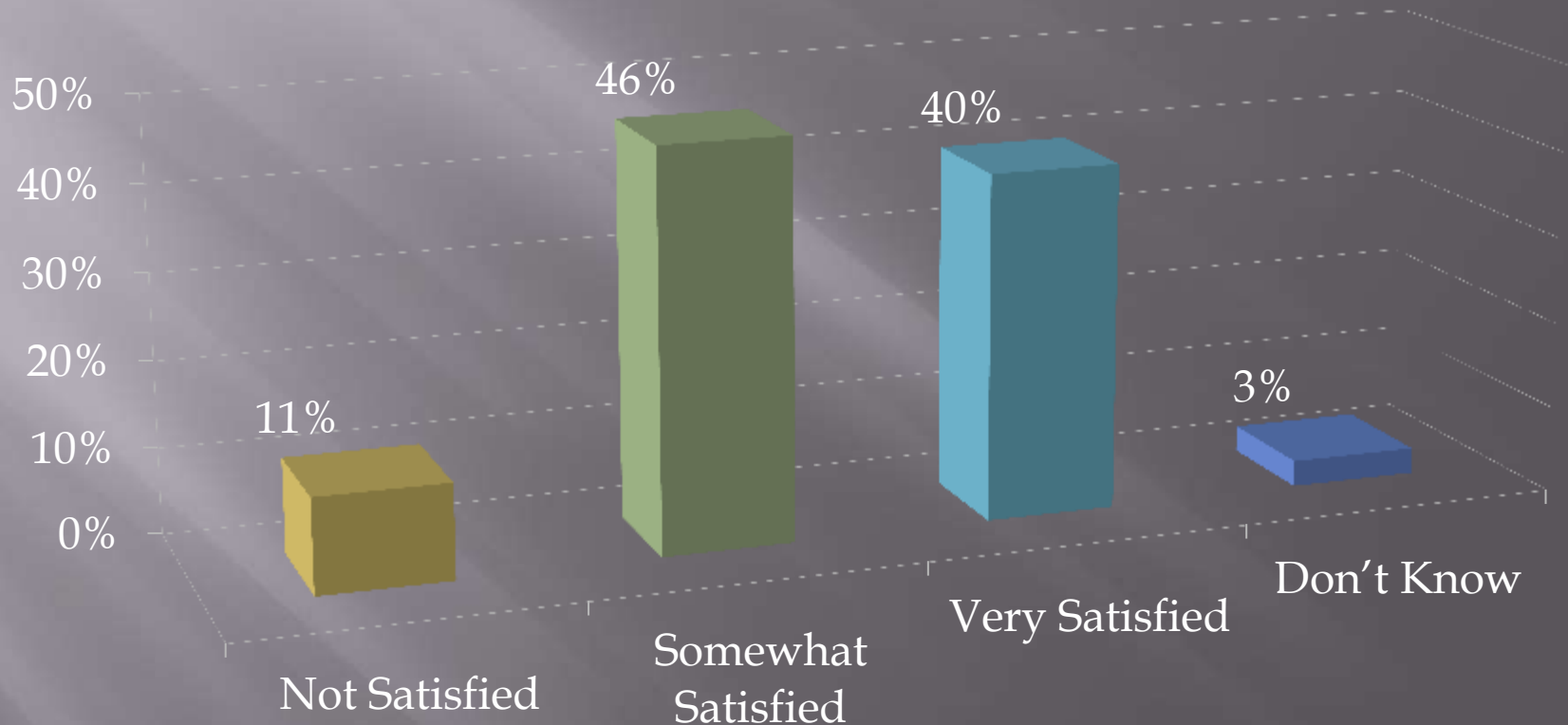
Opportunity: Health Care Spending

Seniors spend progressively more on health care as they age.

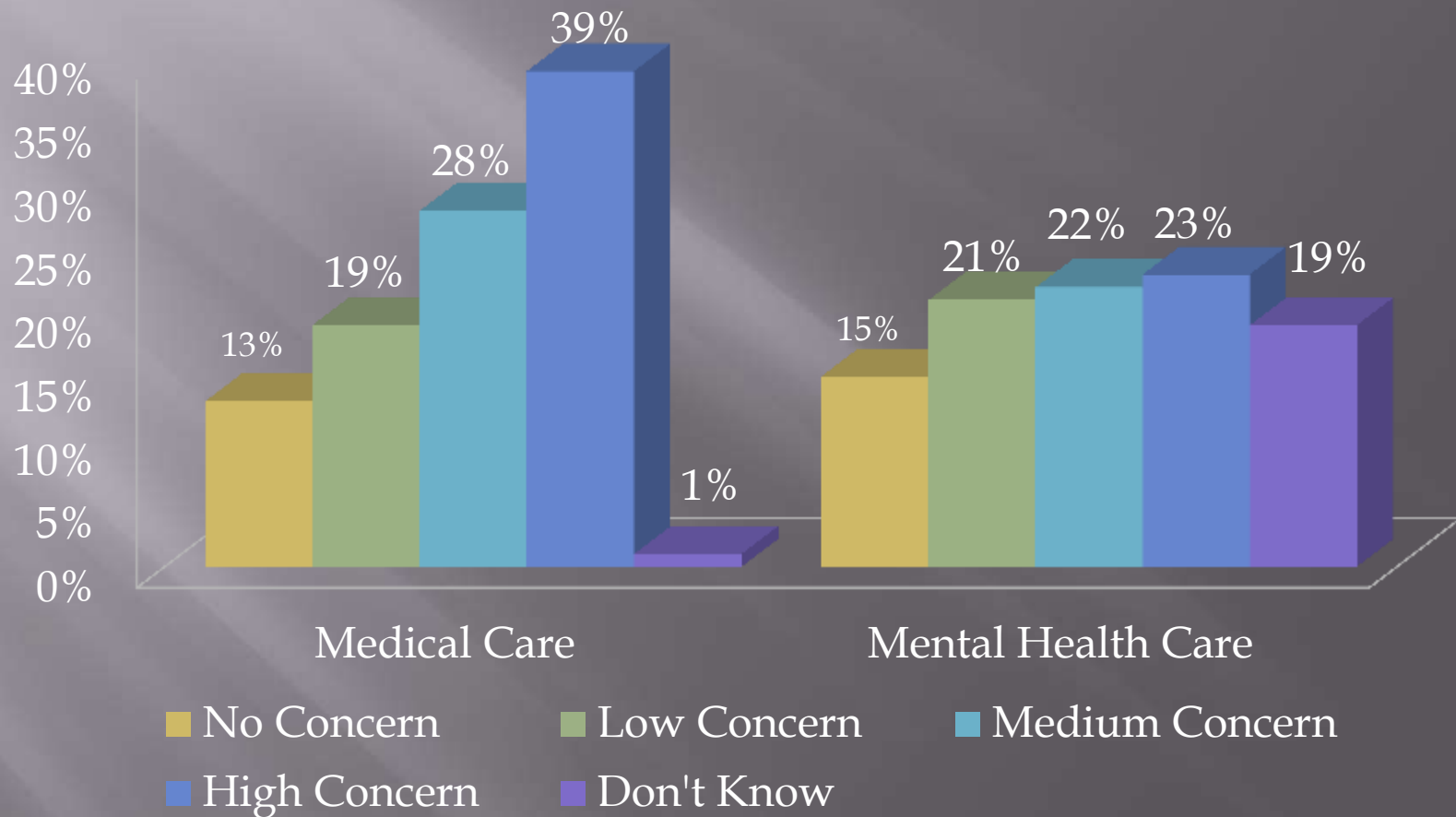
Household annual expenditures by expenditure category, by age of reference person, percent distribution, 2008



Quality of Health Care Services in Otsego County

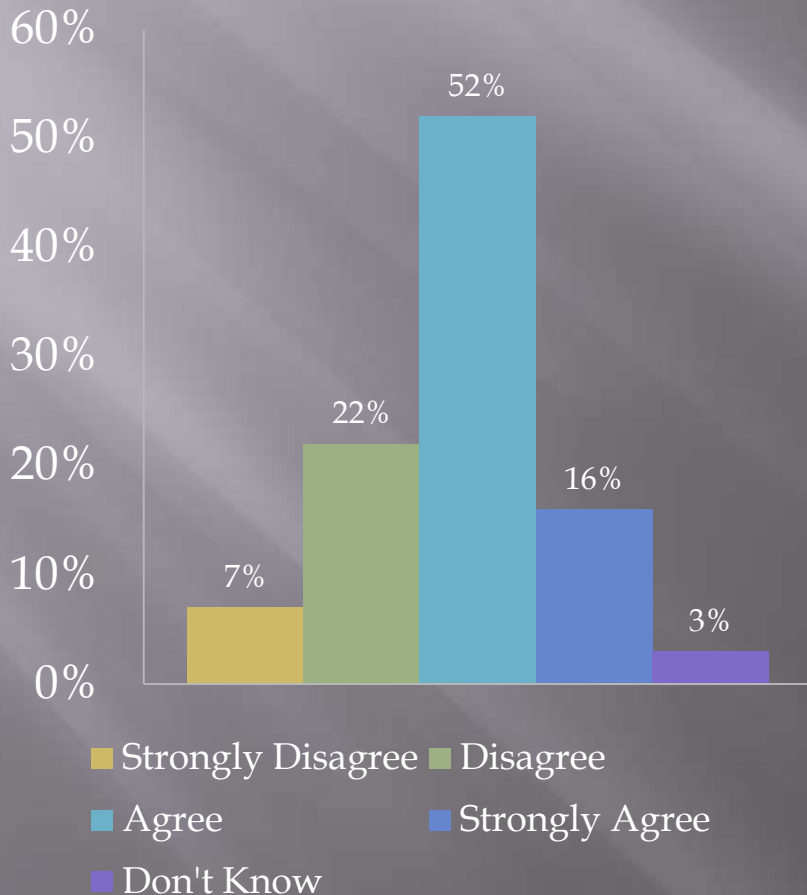


Threat: Access to Health Care

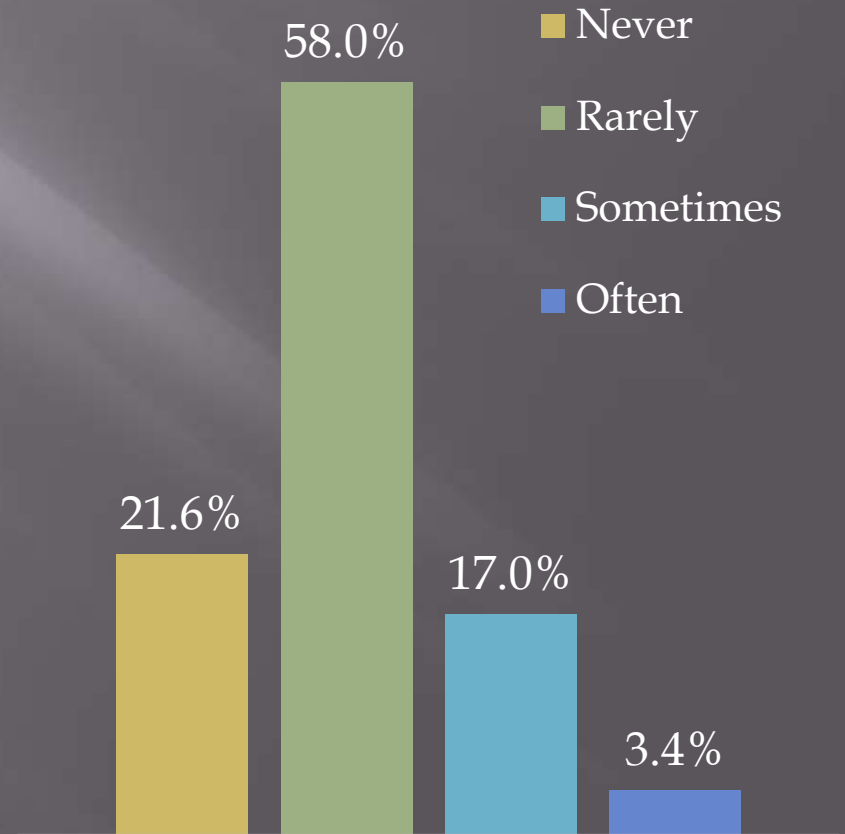


Opportunity/ Threat: Local Health Care

MY HEALTH CARE NEEDS CAN BE ADDRESSED LOCALLY



HOW OFTEN DO YOU LEAVE OTSEGO COUNTY FOR MEDICAL CARE?



Opportunity/Threat: Youth Programs

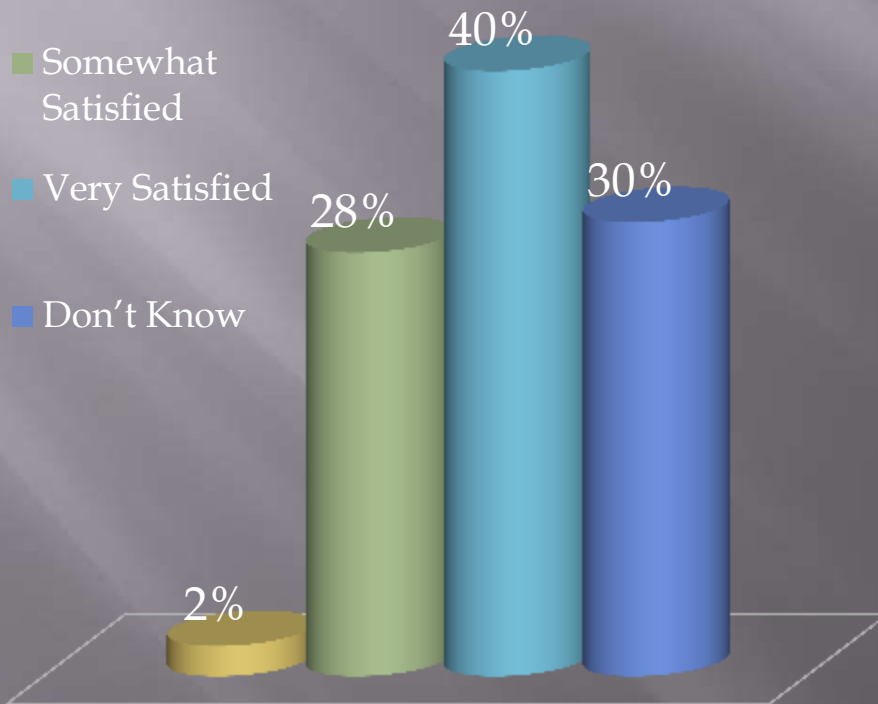
SERVICES AND PROGRAMS FOR SENIOR CITIZENS

■ Not Satisfied

■ Somewhat Satisfied

■ Very Satisfied

■ Don't Know



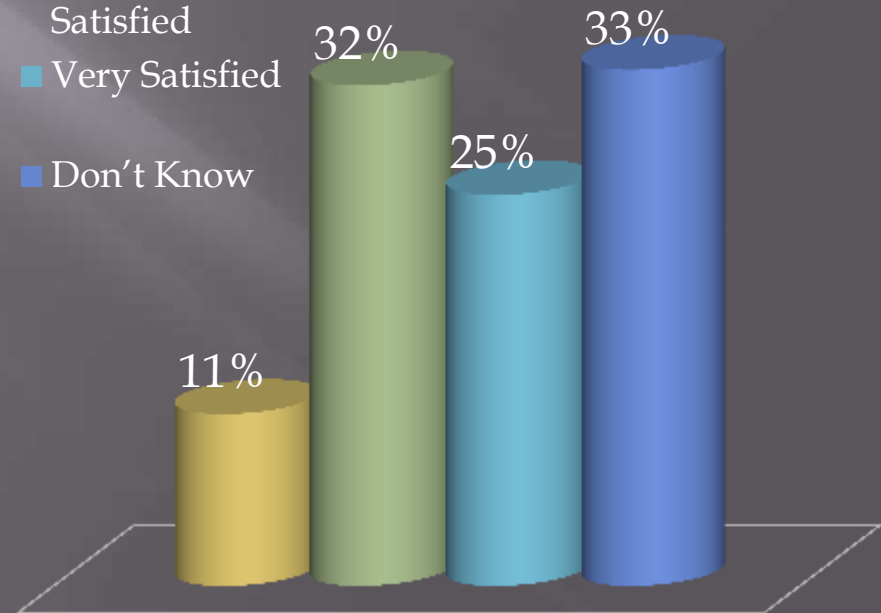
SERVICES AND PROGRAMS FOR YOUTH

■ Not Satisfied

■ Somewhat Satisfied

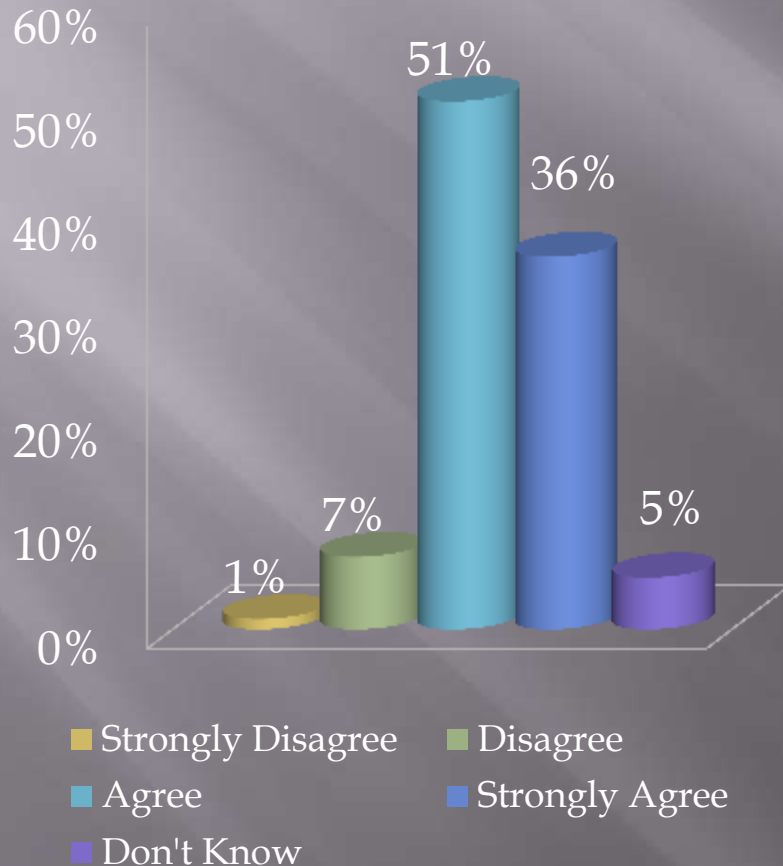
■ Very Satisfied

■ Don't Know

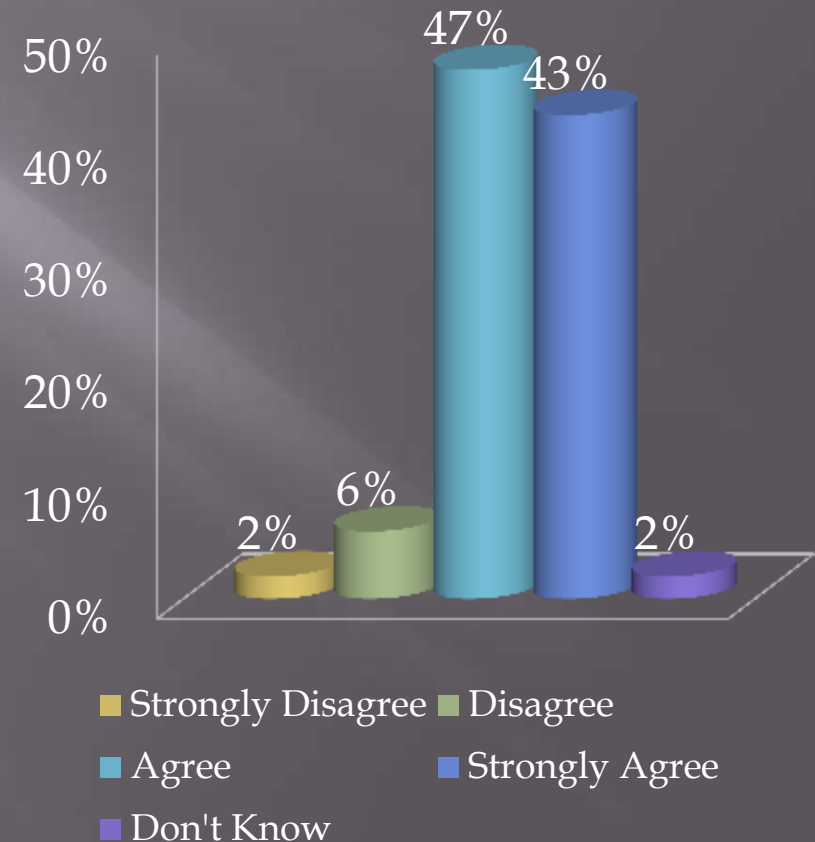


Opportunity: Tourism

OUR LOCAL FESTIVALS HELP
GENERATE COMMUNITY SPIRIT



TOURISM SHOULD BE AN
IMPORTANT PART OF OTSEGO
COUNTY'S FUTURE



Opportunity: Tourism

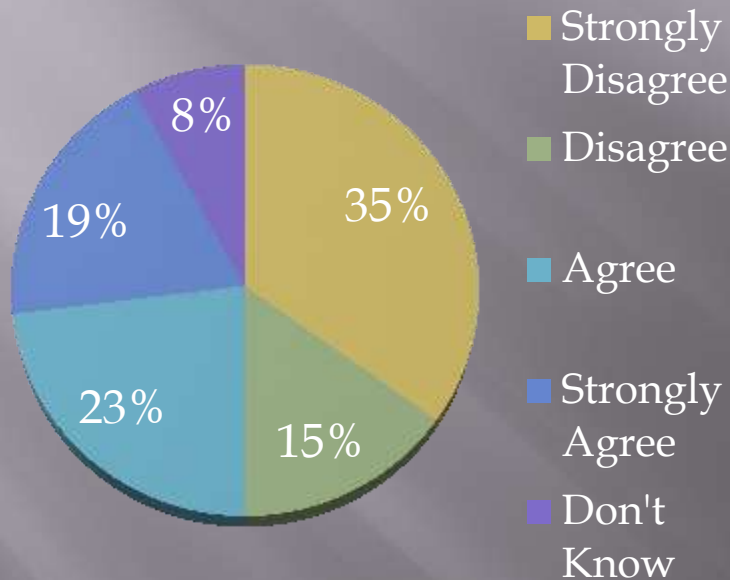
- ▣ CAT Team Comments:
 - “Gaylord” has to be the focus of area marketing. It has name recognition and is our "Brand" for the entire county.
 - Promote the heck out of the Groen Nature Preserve and the North Central State Trail.
- ▣ Pure Michigan Campaign Success Story
 - Golf Mecca: 233,115 rounds of golf in 2011, a 13.6 percent increase over 2010.
 - Total employees, 744; total payroll was more than \$8.3 million, plus property taxes paid of almost \$810,000 in 2011 alone.
 - Visitors are staying longer and spending more money in northern Michigan.

Opportunity: Tourism

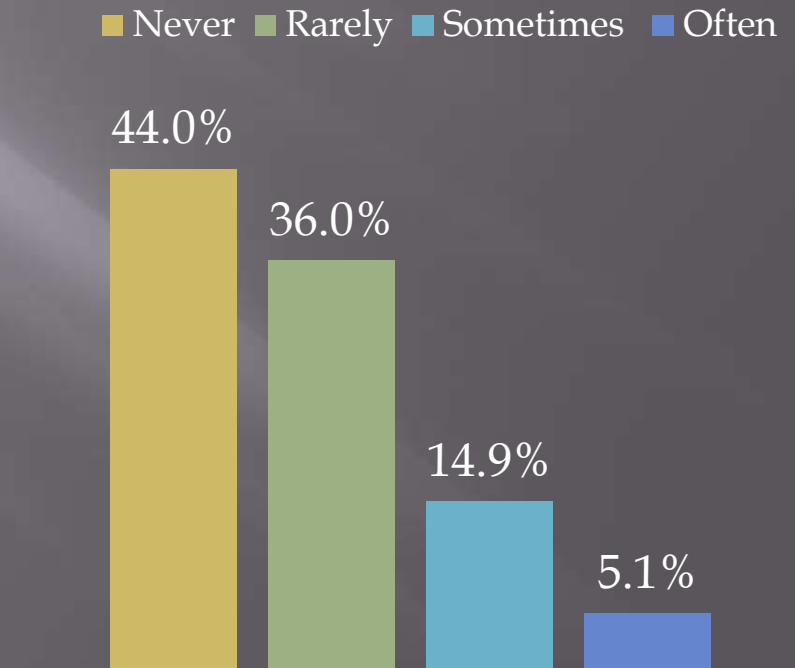
- ▣ CAT Team Recommendations:
 - Community directories - key & critical pieces are in place for a great community resource directory. (e.g. 2-1-1, Herald Times Guide, Chamber of Commerce community profile, otsego.org Community Connection)
 - ▣ Someone needs to coordinate the compilation of the various directories.
 - Update websites regularly. Keep information current.
 - ▣ Identify a lead agency to organize marketing and link existing web sites.

Opportunity/ Threat: Tourism

Casinos should be allowed in Otsego County



In the past 12 months, how often have you recreated in the Pigeon River State Forest?



Opportunity: Location

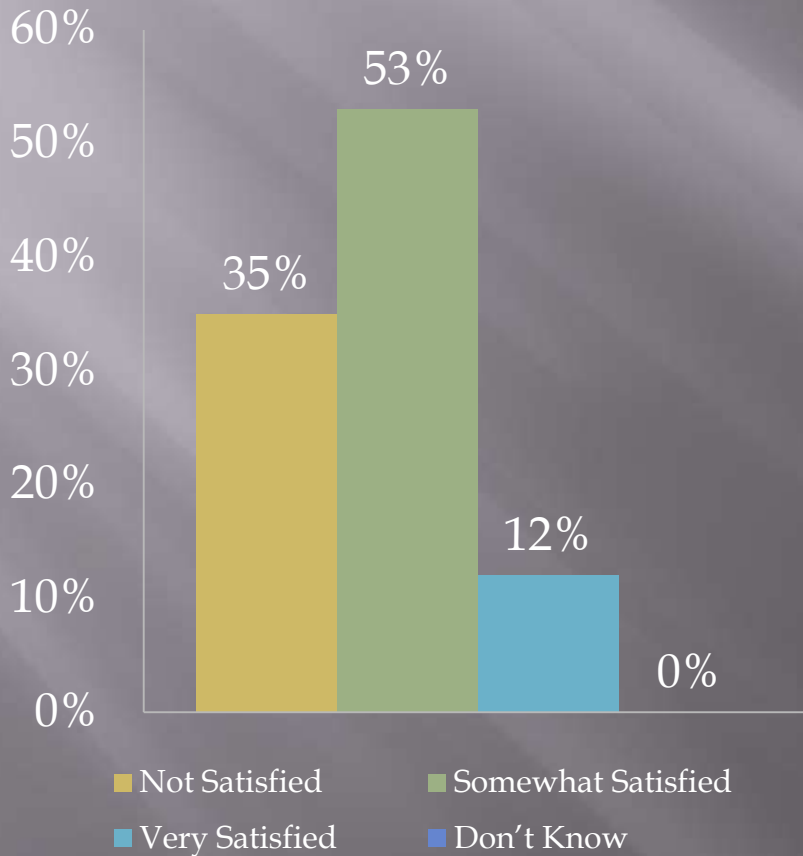
- ▣ CAT Team perceptions:
 - Transportation: Railroad, Airport, and I-75 all assets. Road conditions don't seem worse than other counties.
 - Utilities and infrastructure are good and continuing to improve.

Threat: Location

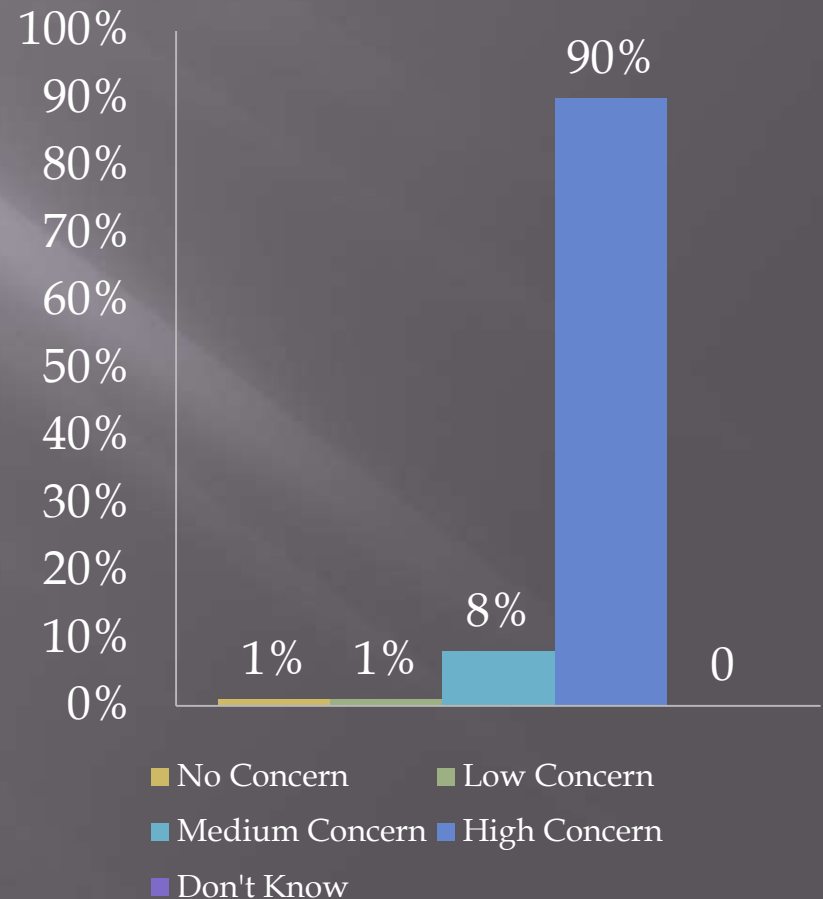
- ▣ Cat Team concerns:
 - Signage / Way Finding - Overall needs to be addressed.
 - ▣ Challenge - how do you capture people coming to or driving through the community? (signage),
 - ▣ more events and festivals,
 - ▣ getting event attendees to connect to community.
 - ▣ Don't even know where to park....

Threat: Location

CONDITION OF LOCAL ROADS



GASOLINE PRICES COMPARED TO SURROUNDING COMMUNITIES



Threat: Employment

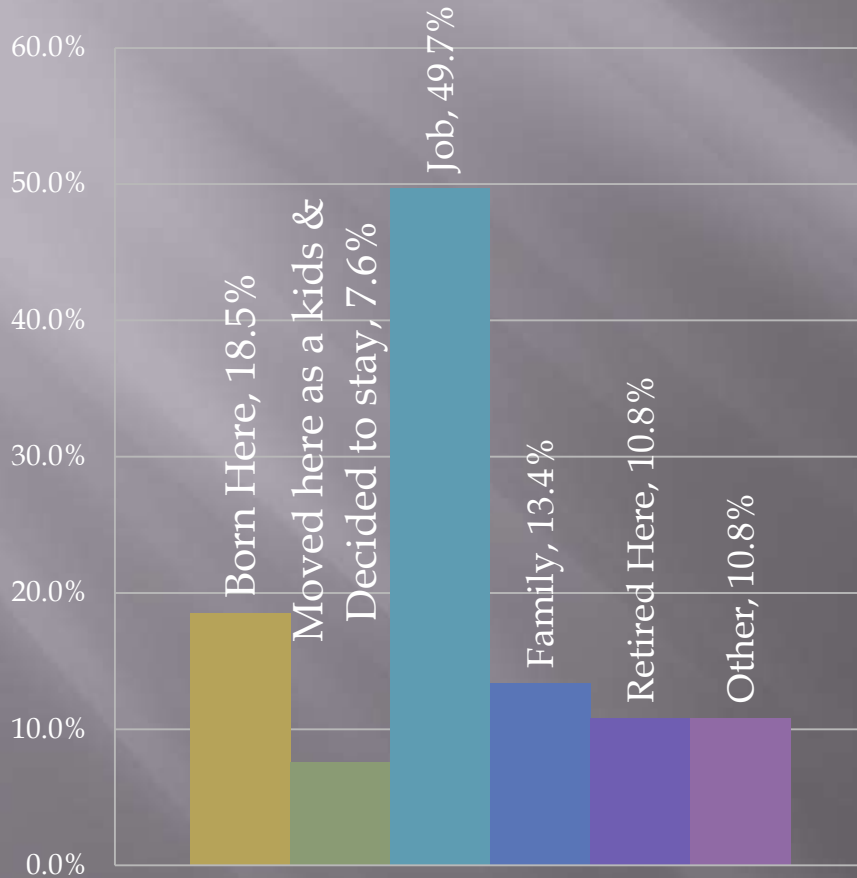
- ▣ Otsego County ranked 64th out of 83 Michigan Counties with a 9.1% unemployment rate in September, 2012.
- ▣ Comparable to Michigan statewide unemployment rate of 9.2%

Threat: Employment

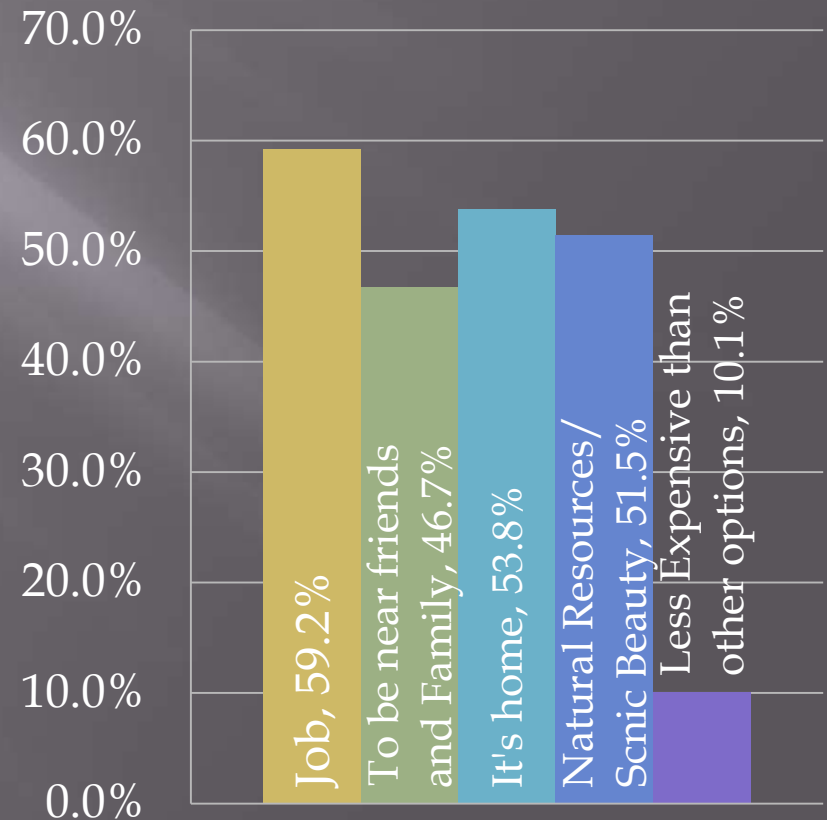
- ▣ Despite Otsego County's growth, between 2000 and 2010 Gaylord experienced the closing of two major manufacturing employers as well as several building materials suppliers.
- ▣ Recent business closures point to continuing concern over employment.
- ▣ These closures resulted in the outmigration of many skilled individuals and their families, mostly in younger ages groups.

Why we live here

WHAT IS THE PRIMARY REASON YOU MOVED TO OTSEGO COUNTY?



WHICH OF THE FOLLOWING STATEMENTS BEST DESCRIBE WHY YOU CHOSE TO REMAIN IN OTSEGO COUNTY?



Opportunity: Employment

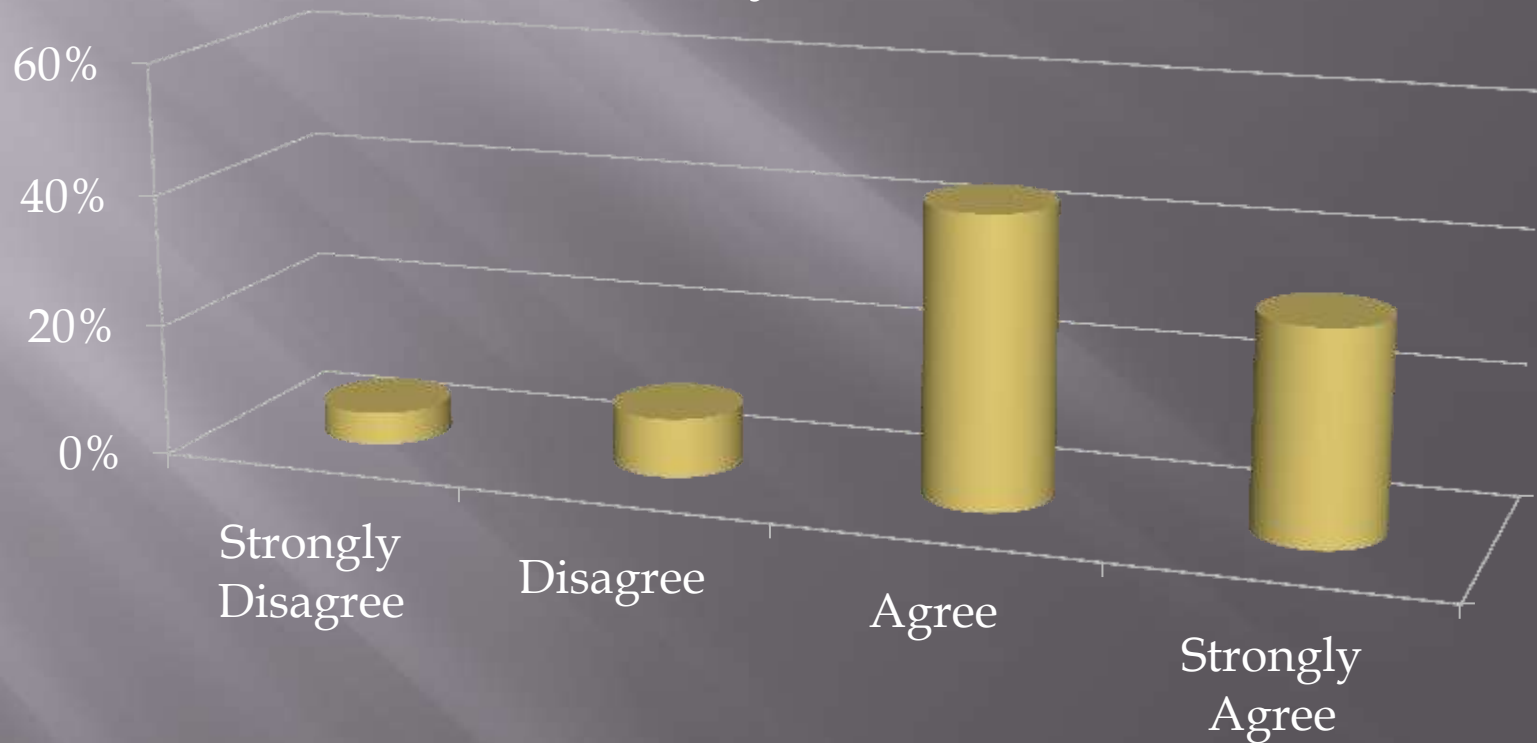
- ▣ CAT Tam Recommendations:
 - Identify businesses who are stage 2 ready to grow (9-99 employees and \$1mil in revenue)
 - ▣ Help business owners focus on strategic growth /increase their number of employees.
 - Explore exporting to new markets.

Opportunities: Business/ Education Collaboration

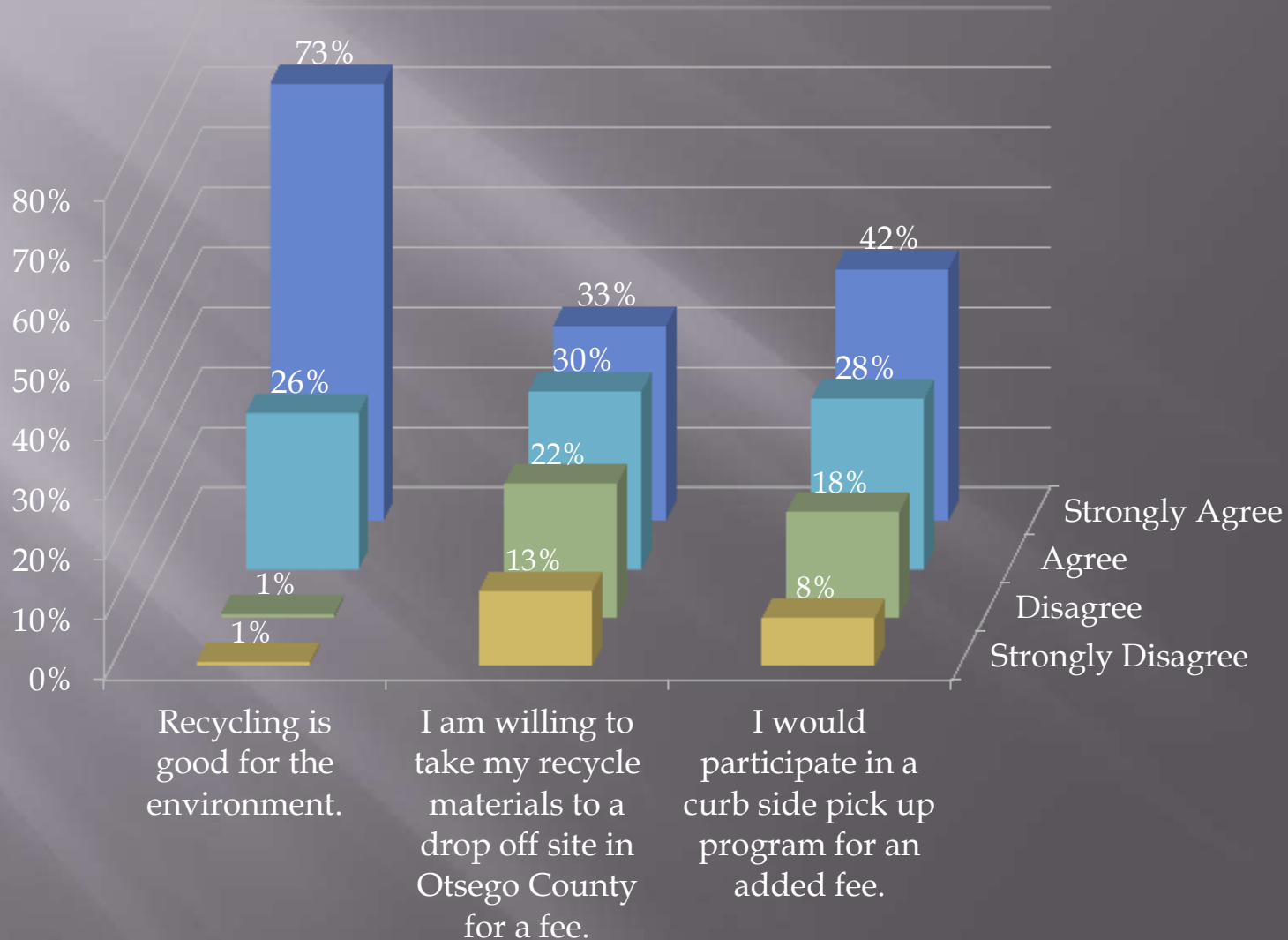
- ▣ CAT Team Recommendation
 - Crossover opportunities between education and businesses.
 - Increase vocational opportunities through M-Tec and University Center.

Opportunity: Public Support of Oil & Gas Industry

Oil & gas should be an important part of Otsego County's future



Opportunity: Concern for Environment

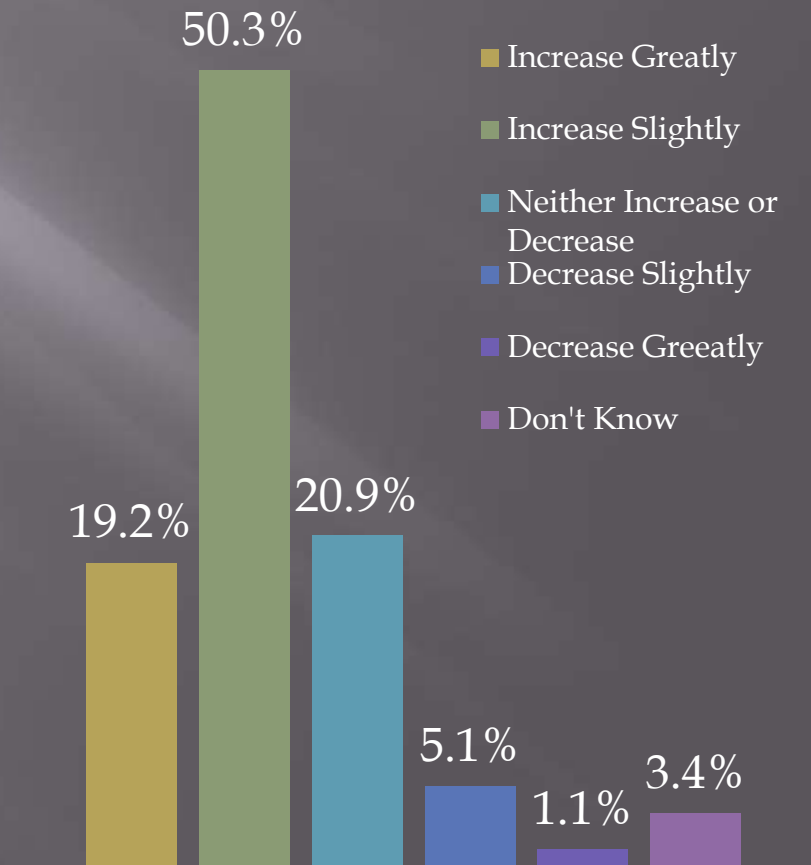


Opportunity: Community Involvement

HOW INTERESTED ARE YOU IN KNOWING WHAT GOES ON (NEWS/EVENTS) IN OTSEGO COUNTY?

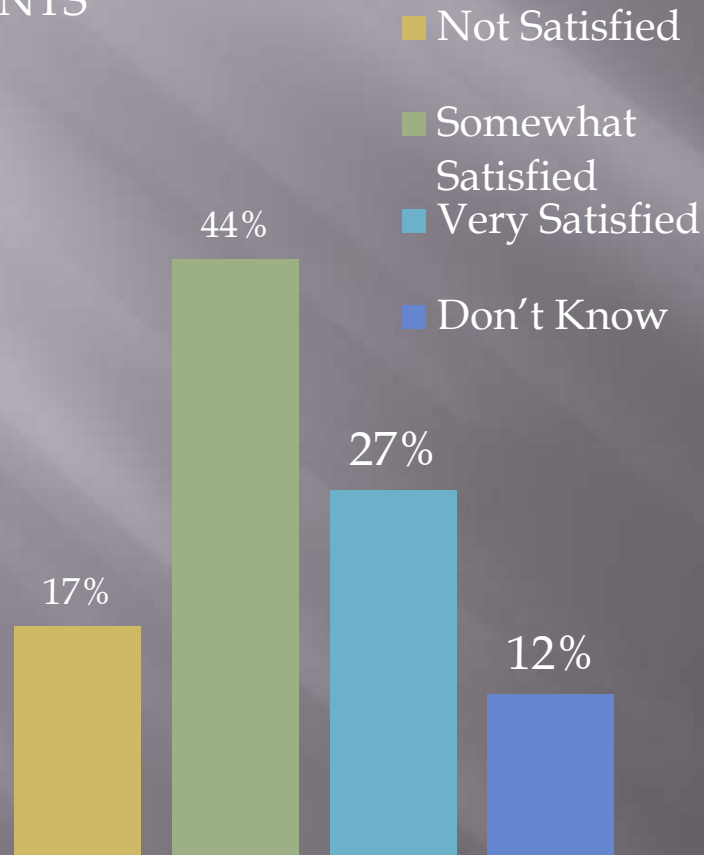


WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU WOULD LIKE TO SEE THE POPULATION OF OTSEGO COUNTY DURING THE NEXT 10 YEARS?

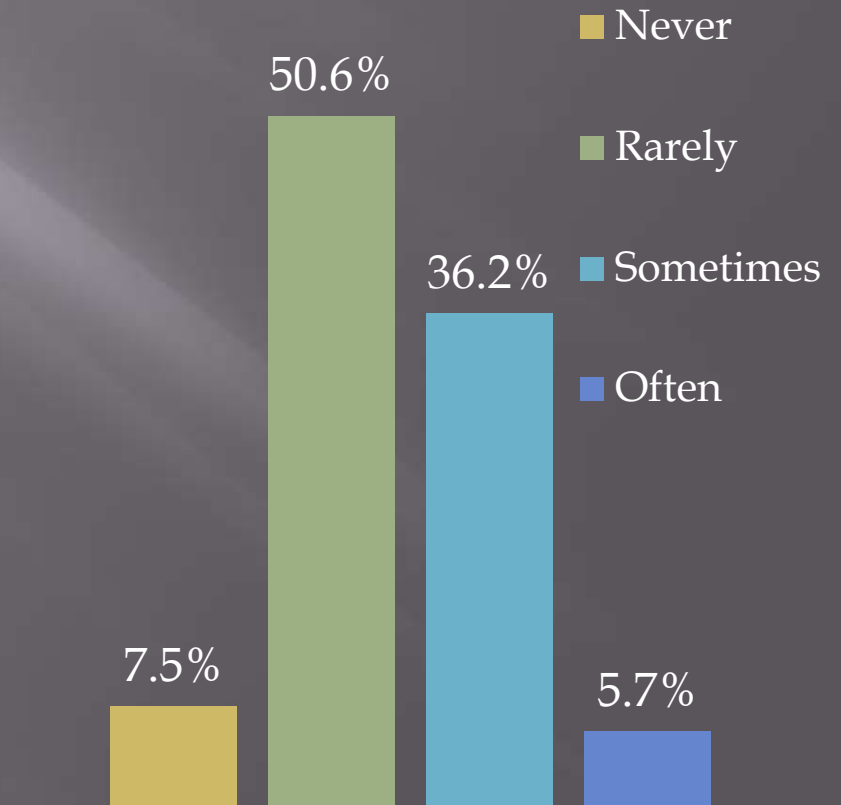


Opportunity: Recreation & Culture for Local Residents

CULTURAL EXPERIENCES SUCH AS
PLAYS, CONCERTS, AND ART
EVENTS

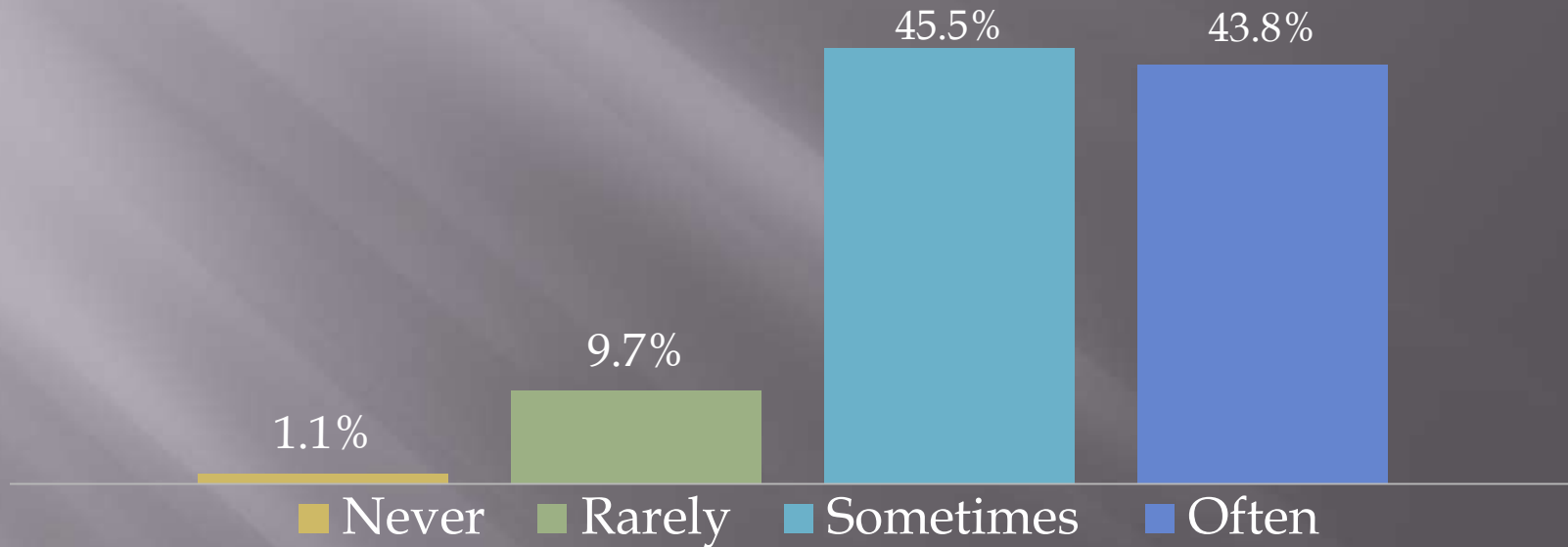


HOW OFTEN DO YOU LEAVE
OTSEGO COUNTY FOR
ENTERTAINMENT?



Opportunity: Downtown Development

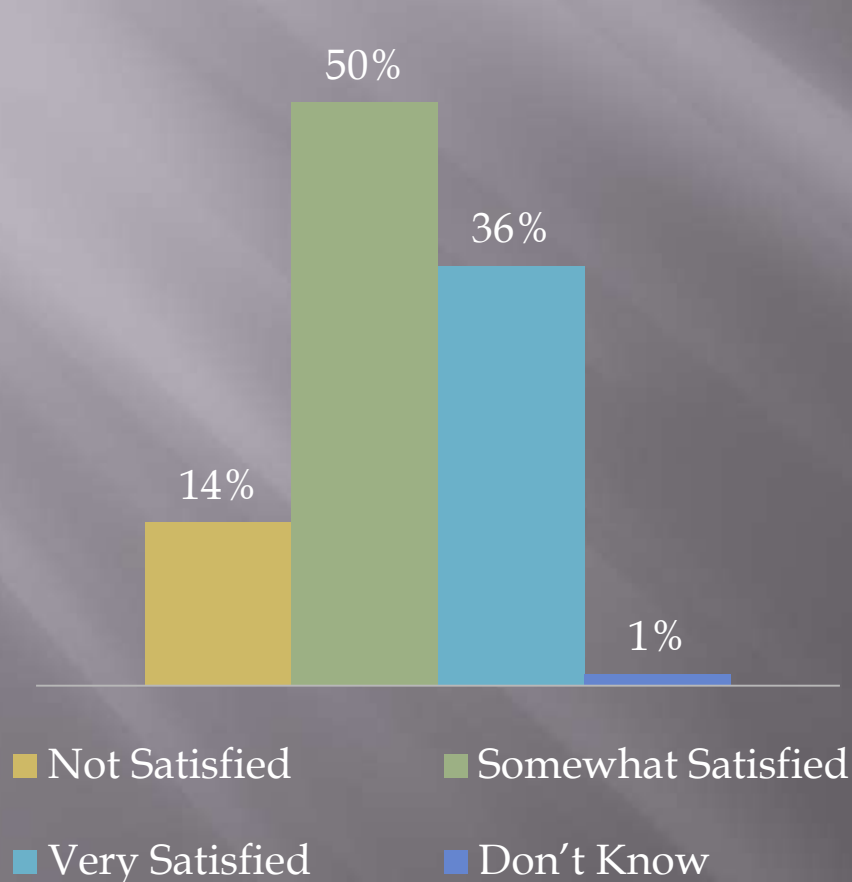
IN THE PAST 12 MONTHS, HOW OFTEN HAVE YOU SHOPPED OR DINED IN DOWNTOWN GAYLORD?



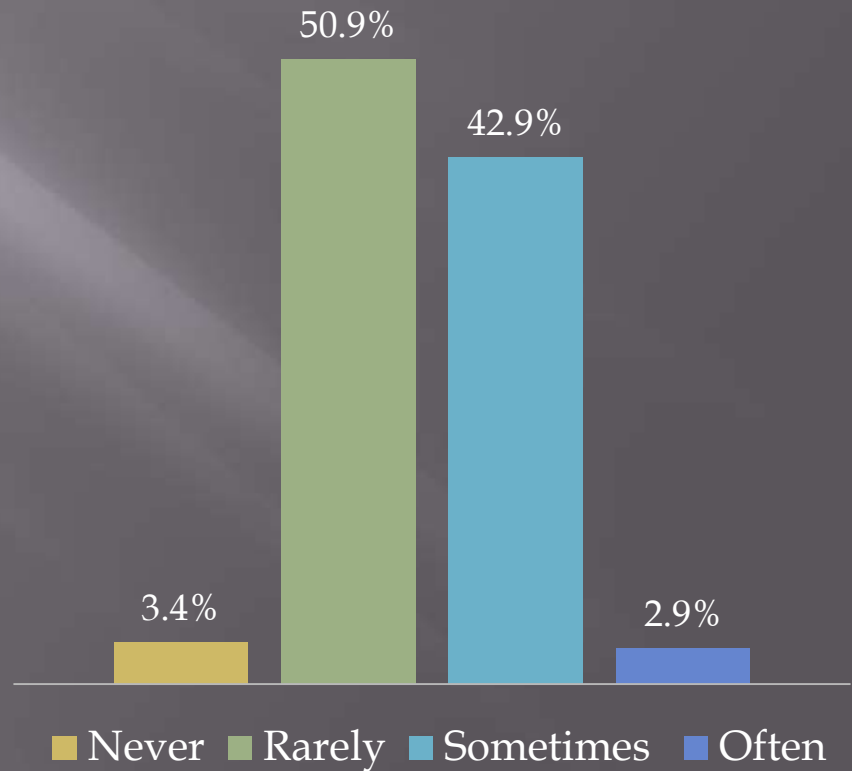
Support need for Downtown Renaissance Initiative

Opportunity/ Threat: Shopping Availability

Variety of retail shopping

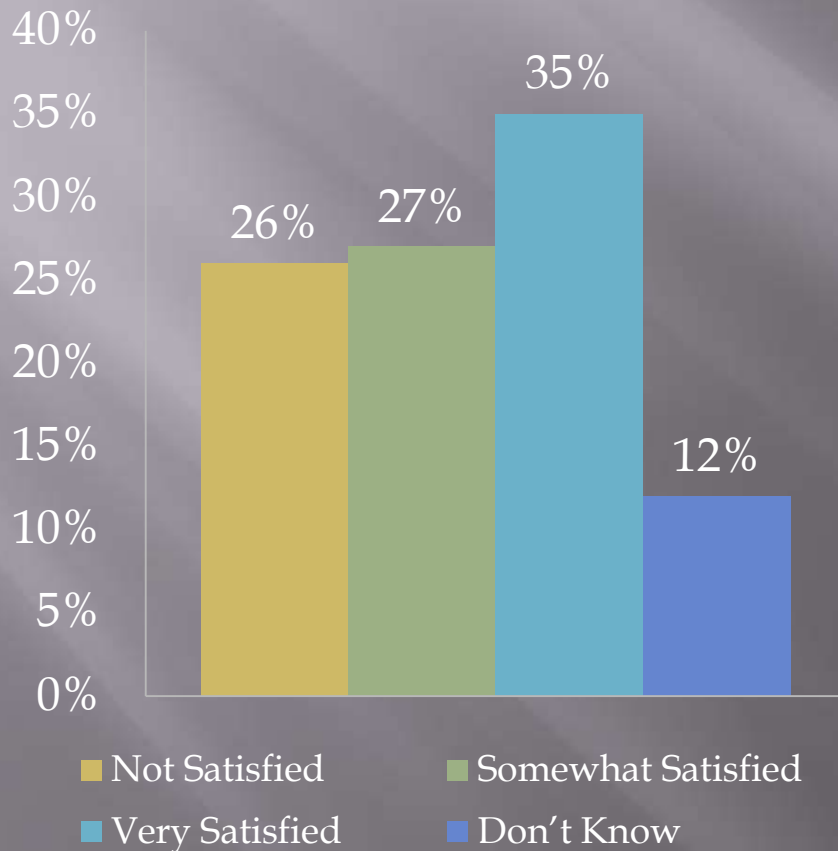


How often do you leave Otsego County for shopping?

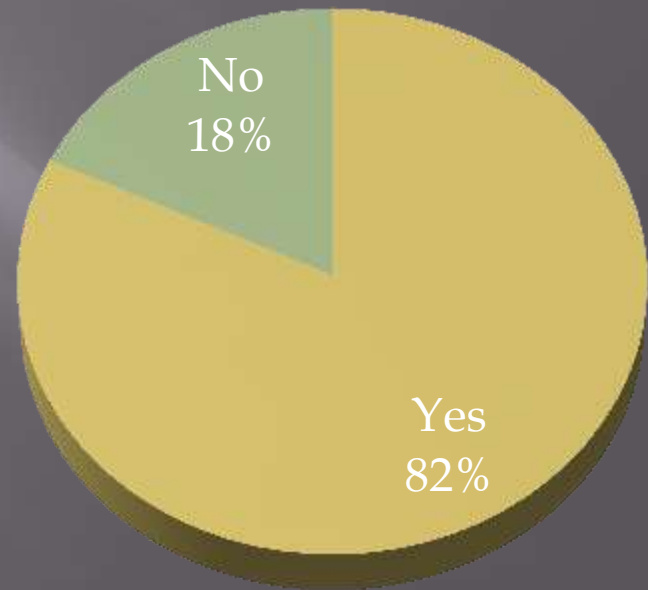


Opportunity/ Threat: Internet Access

AVAILABILITY OF HIGH SPEED INTERNET ACCESS

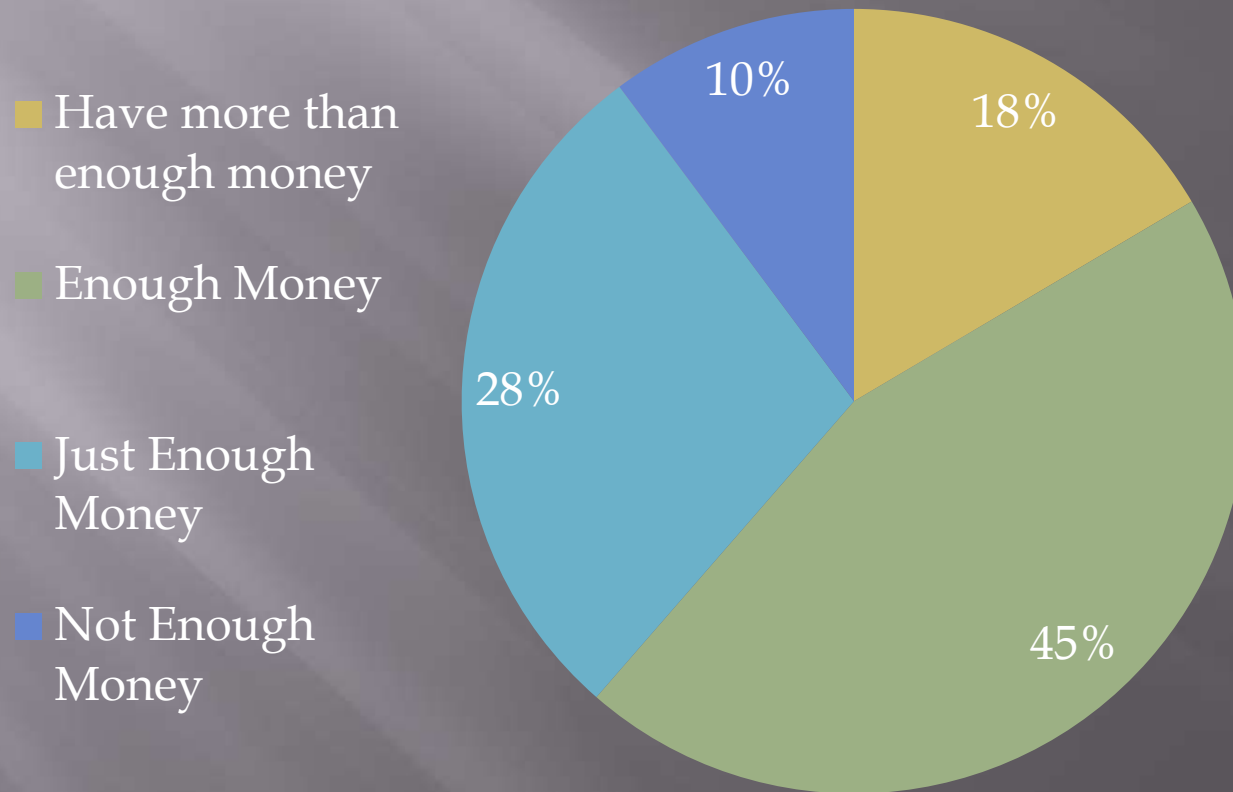


Do you have internet access at your home?

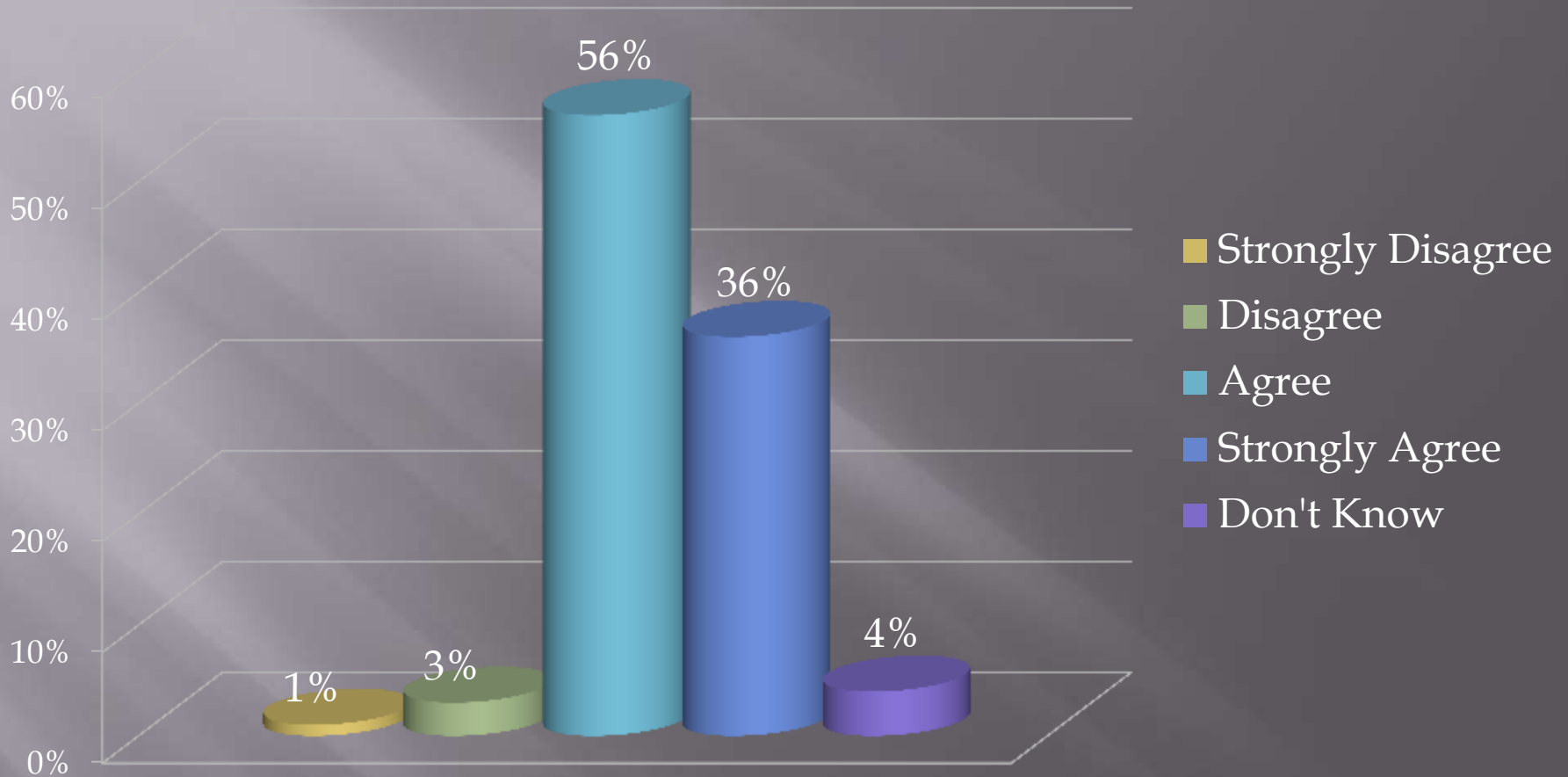


How are you doing?

Which of the following best describes how well your total income meets your everyday needs for things such as housing, food, clothing and other necessities?



In Conclusion...



Otsego County is a great place to
raise a family.