

# Ottawa County Citizen Survey

## EXECUTIVE SUMMARY & DEMOGRAPHIC ANALYSIS

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Presented by

EPIC • MRA

July 2018



Ottawa County  
*Where You Belong.*

# Methodology

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- EPIC ▪ MRA administered interviews with 400 registered voters residing in the Ottawa County from April 23-16, 2018
- 30% of the interviews were completed with cell phone users
- $\pm 4.9$  percent margin of error



# Questionnaire Frame

## Standard Inquiries

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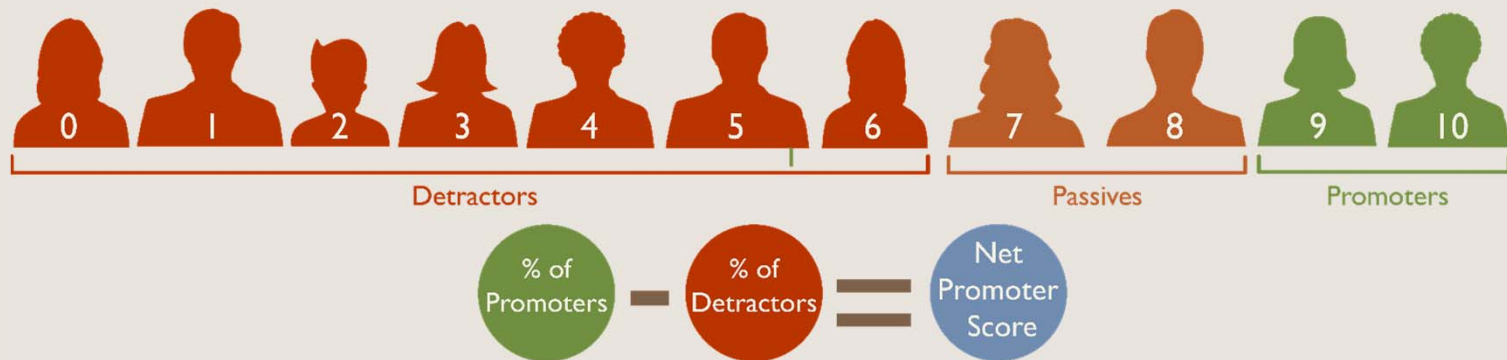
- Gauge “customer satisfaction” by asking:
  - Perceptions of how things are going
    - Statewide
    - Countywide
    - Locally
- What’s the biggest problem facing their county
- Perceptions about specific county services and programs
- Assess public opinion re: tax options
- Probe attitudes re: relative tax burden
- Investigate top-of-mind responses to general likes, dislikes, and preferences



# Questionnaire Frame

## Inquiries Unique to 2018

- Introduced a “Net Promoter Score”
  - On a scale of 0 to 10, with 10 being very likely and 0 being not likely at all, how likely would you recommend Ottawa County as a good place to move to?



- Inquiry into interest in an Express Bus Service
- A baseline measurement gauging the importance of promoting Ottawa County as a welcoming place for diverse populations



# Overarching Conclusions

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- Easing of 2012 high levels of voter anxiety about the economy and jobs – this has evolved as a trend, with the 2014, 2016, and the 2018 data, bolstering the observation
- Relative comfort with personal financial security produces less antipathy toward governmental entities, generally
  - Greater recognition of value for taxes paid
  - Greater preference for maintaining services vs. keeping taxes low
  - Higher importance placed on non-economic development programs
- State and local responses to address transportation infrastructure needs have not eliminated “Roads” as a top issue of citizen concern



# Basis for Conclusions

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- The “Right Direction” (vs. “Wrong Track”) data remain steady for the County and Local levels of government
- “Positive” (vs. “Negative”) ratings remain very high – show marked increases – for the county and local governments
- The County’s management of finances “positive” rating remains over a majority, with continued very low “negative” rating



# Basis for Conclusions, cont.

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- “Taxes About Right” (vs. “Too High”) response for how citizens view the value of county services in exchange for taxes paid
- Building on results beginning in 2014, “Maintaining existing services even if it means paying higher taxes” receives a strong majority of support (62%) compared to the statement expressing the need to: “Keep taxes and fees low, even if it means a reduction in service levels”
- Re-ordering of the priority in where the County needs “More”
  - Mental Health Services keeps its top spot on the “More” scale
  - Substance abuse prevention and treatment maintains its #3 position



# Summary

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- Notwithstanding an ever-present eye on the economy, Ottawa County residents remain pleased with service delivery provided by their county government
  - High “Positive” ratings for overall performance and for performance in specific areas
  - The need to do “More” to promote economic development and attract business remains in seventh place out of twelve items
  - Virtually all residents surveyed (99%) report feeling “safe” in their neighborhood
  - Despite state and county action to address the issue, road-related activities are cited as an area in need of the most improvement





# Detailed Results for Selected Questions

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# Right Direction or Wrong Track?

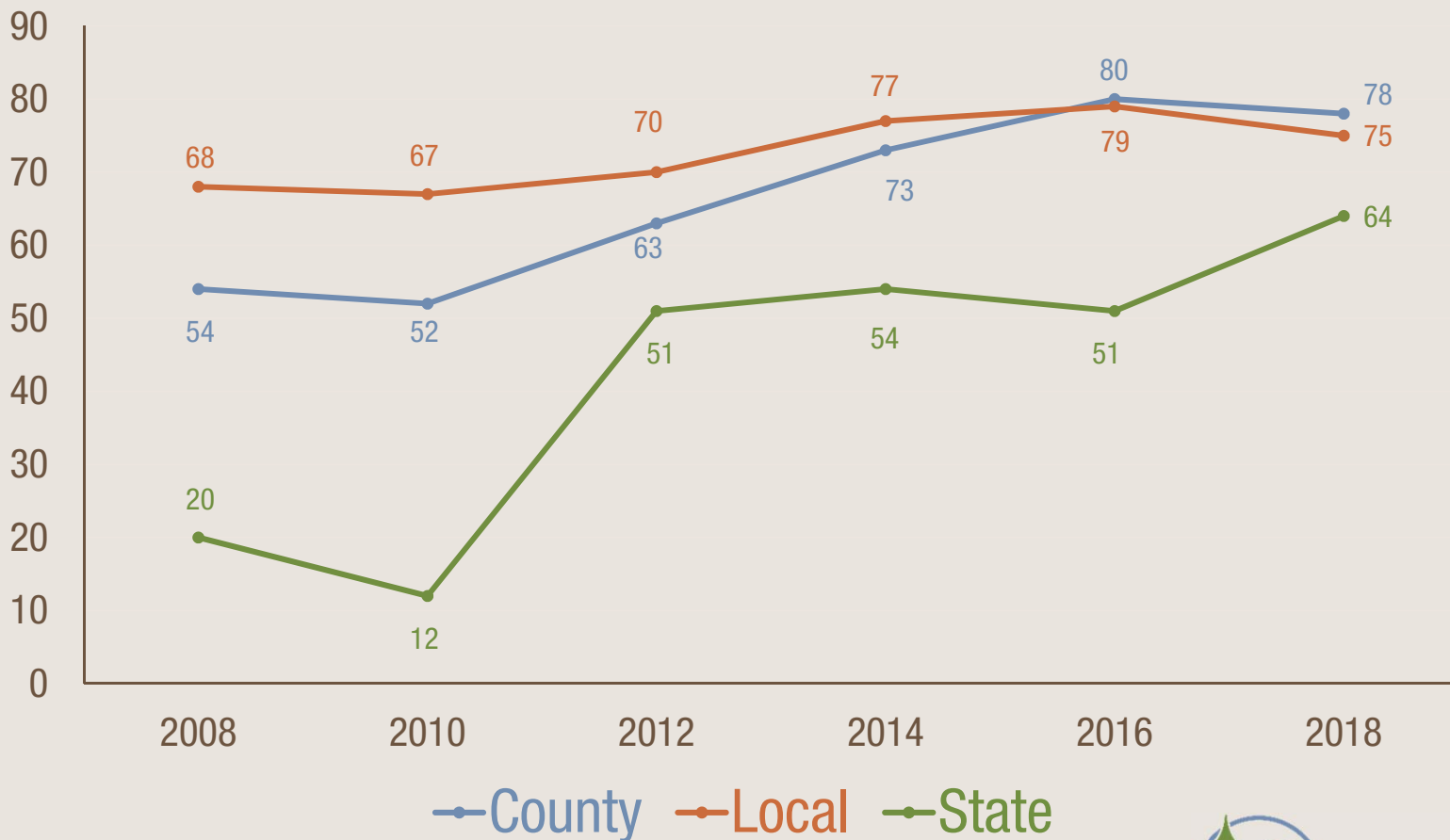
Overall, do you think that Ottawa County is headed in the right direction, or, do you think that things are pretty seriously off on the wrong track?

“RIGHT DIRECTION” COMPARISON	2018	2016	2014	2012	2010	2008	2006
STATE	64%	51%	54%	51%	12%	20%	---
COUNTY	78%	80%	73%	63%	52%	54%	71%
LOCAL	75%	79%	77%	70%	67%	68%	76%

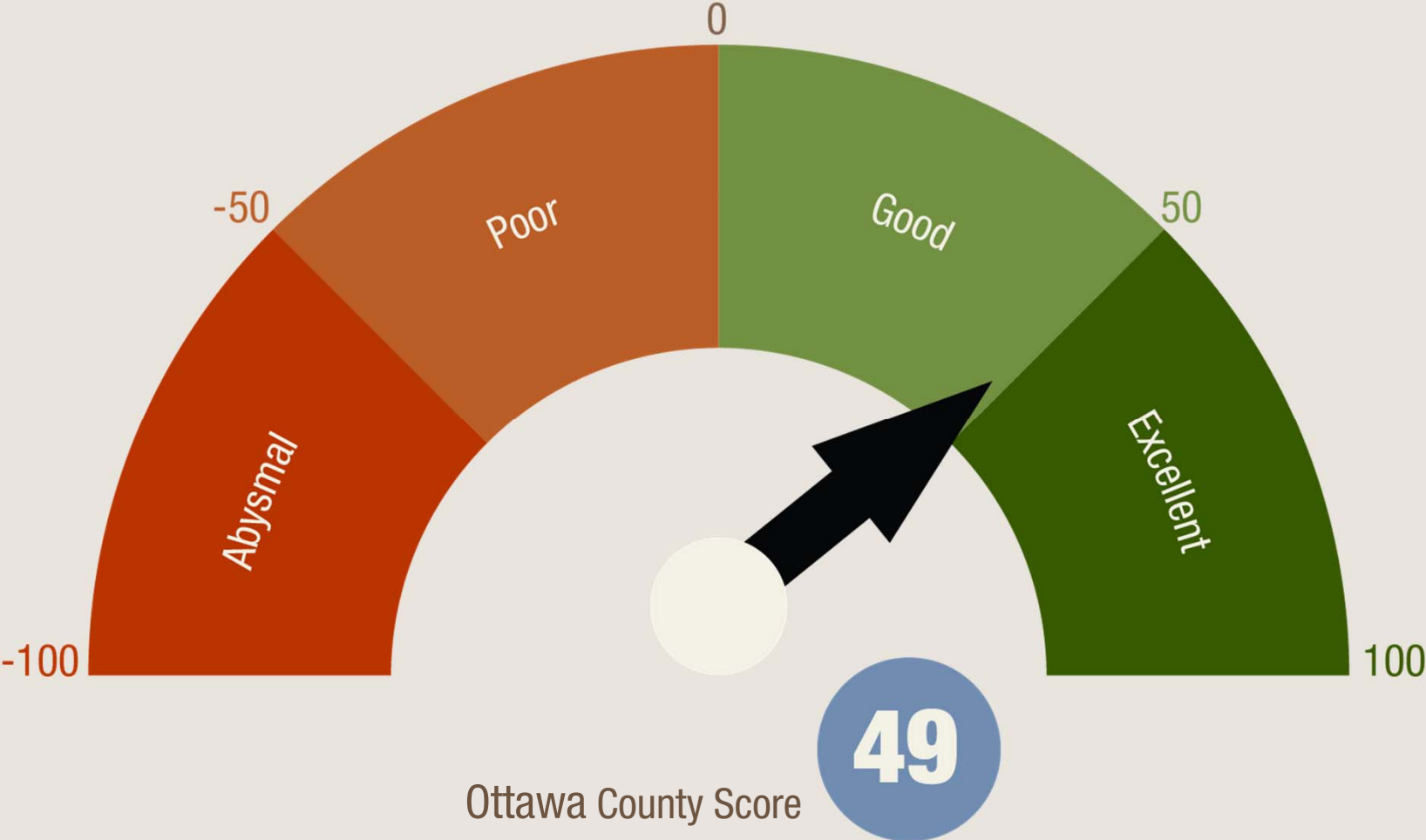


# Overall, do you think that Ottawa County is headed in the right direction, or, do you think that things are pretty seriously off on the wrong track?

Comparison of "Right Direction"



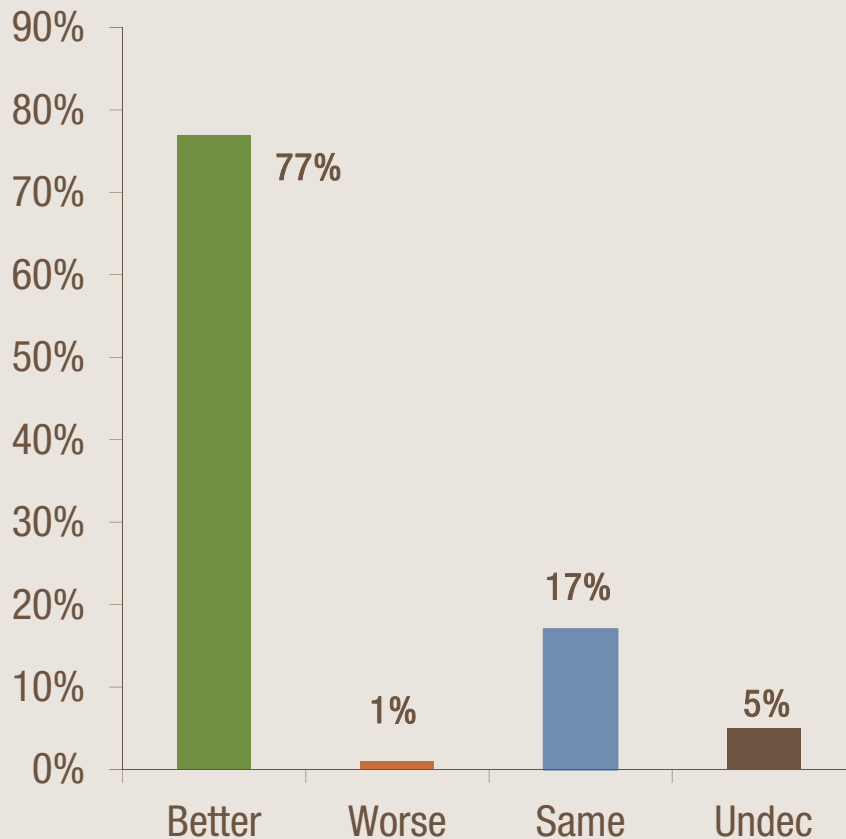
# Ottawa County Net Promoter Score



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# Ottawa County Compared to Regional Neighbors

2018



Compared to other counties in the region, would you say Ottawa is a better, worse or similar place to live?

	Better
2016	75%
2014	73%



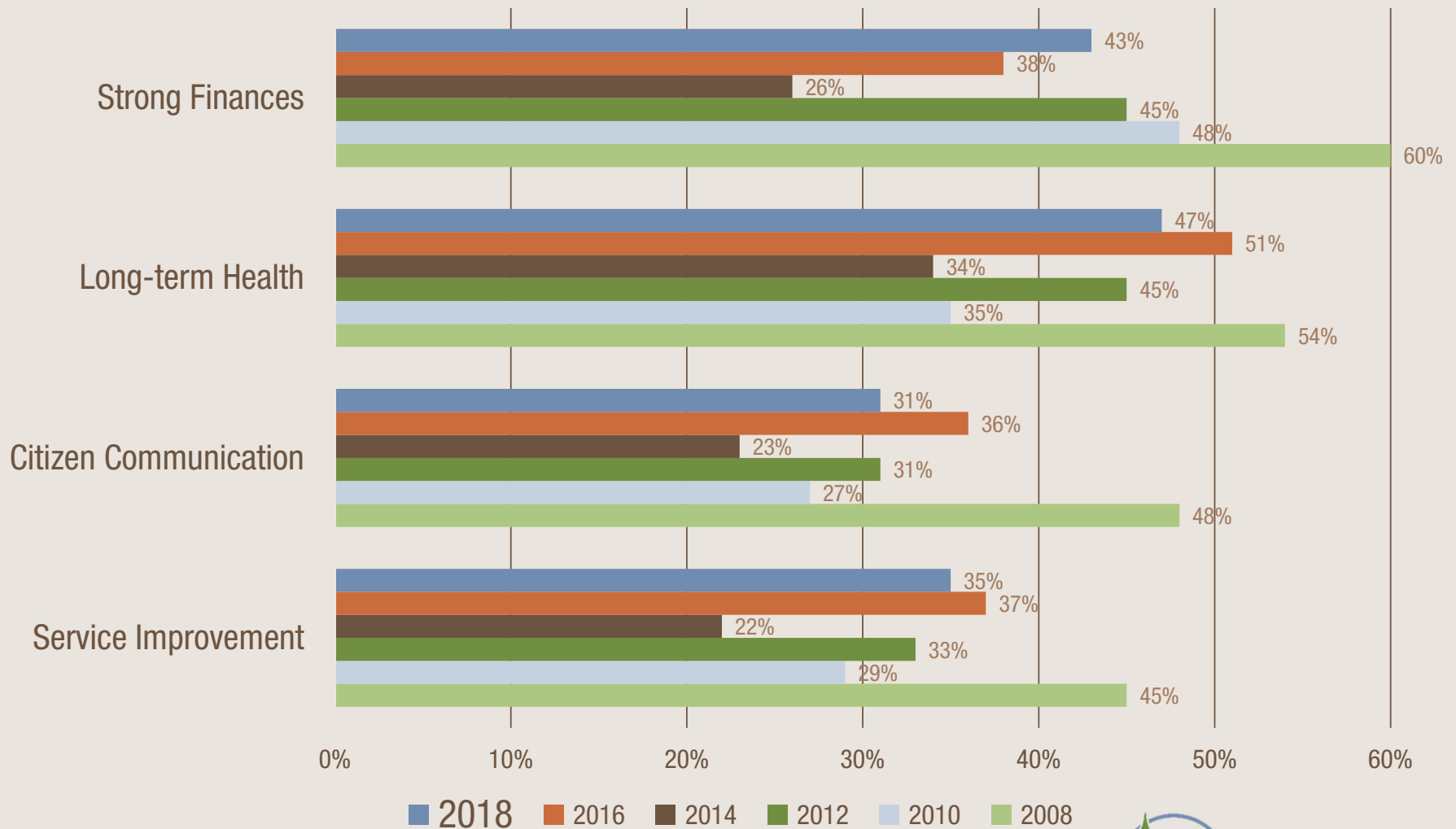
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# All Strategic Plan Goals Seen As Being, At Least, “Important”

Ranked by “Total Important”	Top Priority	Total Important
Maintain/Improve County’s strong financial position	43%	88%
Contribute to the long-term economic, social and environmental health of the county	47%	87%
Maintain/enhance communication with citizens, employees and staff	31%	80%
Continually improve the County’s organization and services	35%	79%



# All Strategic Plan Goals “Top Priority” Time Series



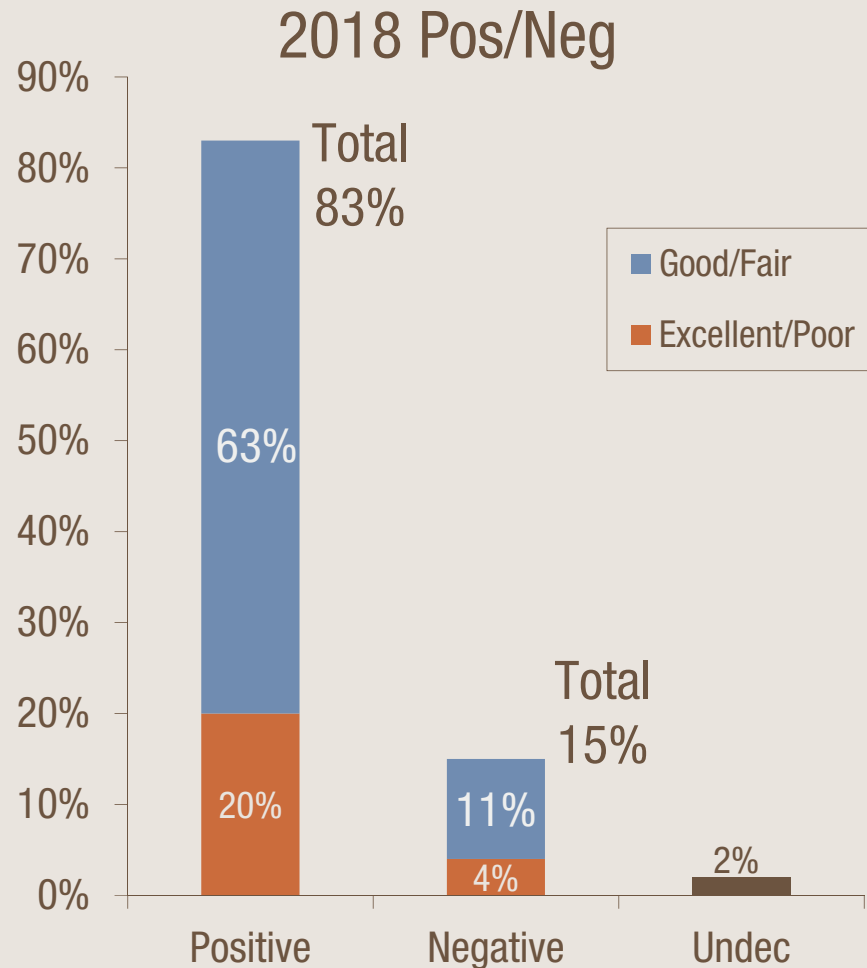
# Biggest “Prompted” Problem

Ranked by 2018 Order (#) = other year rank	2018	2016	2014	2012	2010	2008	2006
Maintain/Improve roads	26%	24% (1)	18% (2)	11% (5)	8% (4)	7% (4)	5% (7)
Protecting from crime & drugs	18%	14% (3)	16% (4)	13% (3)	6% (5)	14% (2)	5% (7)
Providing affordable housing	15%	6% (7)	N/A	N/A	N/A	N/A	N/A
Improving area schools	12%	11% (5)	13% (5)	16% (2)	13% (2)	6% (5)	10% (4)
Keeping taxes and fees low	9%	12% (4)	16% (3)	12% (4)	12% (3)	9% (3)	10% (4)
Providing econ devlpt & jobs	6%	15% (2)	26% (1)	35% (1)	45% (1)	37% (1)	32% (1)
Protect the environment	6%	8% (6)	4% (6)	5% (6)	3% (7)	6% (5)	3% (9)





# Rate your City/Township/Village Government



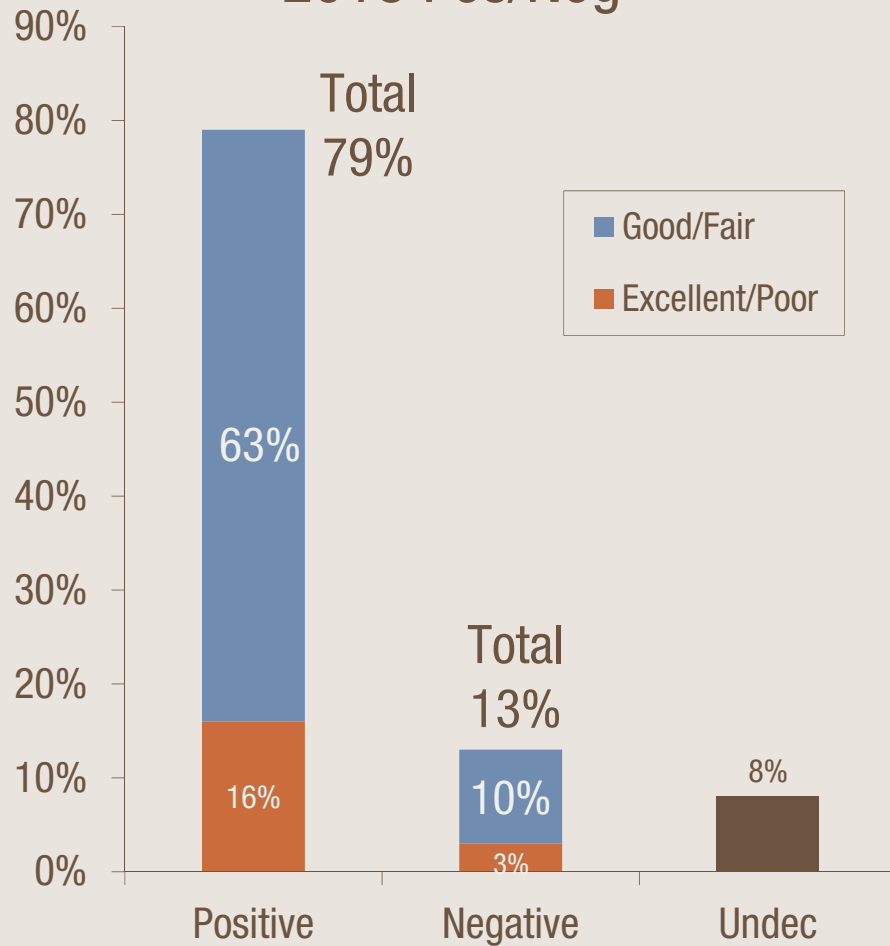
### Prior Years' Pos/Neg

	Total Positive	Total Negative
2016	72%	16%
2014	79%	16%
2012	78%	19%
2010	75%	23%
2008	75%	19%
2006	85%	14%



# Rate your County Government

## 2018 Pos/Neg



## Prior Years' Pos vs. Neg

	Total Positive	Total Negative
2016	71%	15%
2014	76%	15%
2012	76%	14%
2010	73%	19%
2008	70%	20%
2006	79%	14%



# Ottawa County does the best job at providing... (unprompted)

Ranked by 2018 Order (#) = other year rank	2018	2016	2014	2012	2010	2008	2006
Parks and Recreation	22%	17% (2)	13% (3)	15% (3)	12% (3)	13% (2)	8% (4)
Snow Removal plus "Roads"	18%	19% (1)	18% (1)	25% (1)	29% (1)	17% (1)	26% (1)
Sheriff plus "Police/Law Enforcement"	13%	11% (3)	16% (2)	23% (2)	22% (2)	14% (2)	17% (2)



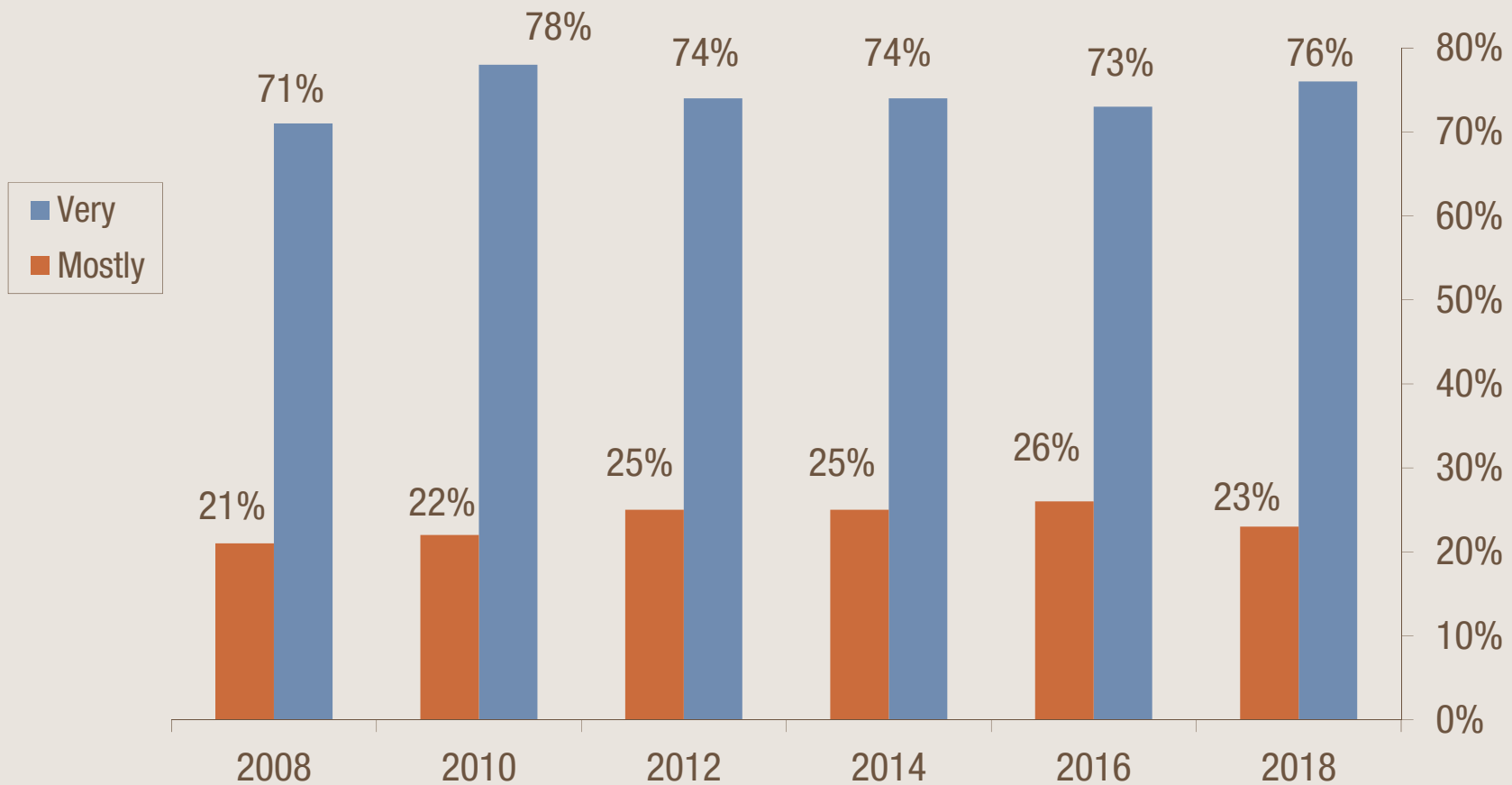
# What County service needs the most improvement? (unprompted)

Ranked by 2018 Order (#) = other year rank	2018	2016	2014	2012	2010	2008	2006
<b>Roads</b> plus "Snow Removal"	44%	34% (1)	36% (1)	38% (1)	40% (1)	38% (1)	30% (1)
<b>Mental Health</b>	4%	3% (2)	1% (5)	1% (5)	---	---	---
<b>Nothing</b>	3%	3% (3)	2% (1)	10% (2)	4% (2)	8% (2)	---
<b>Undecided</b>	28%	36%	39%	29%	39%	32%	42%

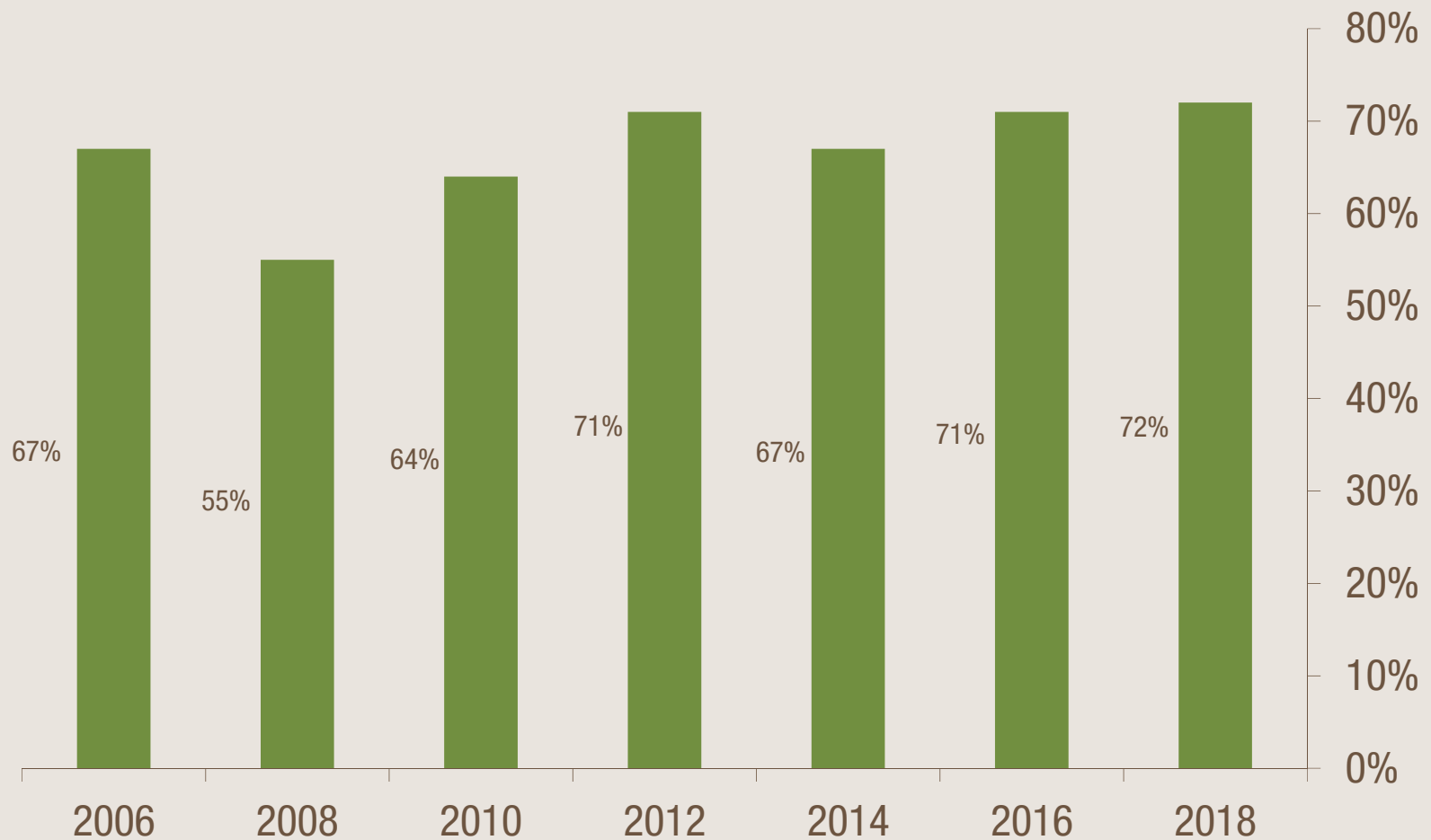


# Perceived Personal Safety

“How safe do you feel in your neighborhood?”

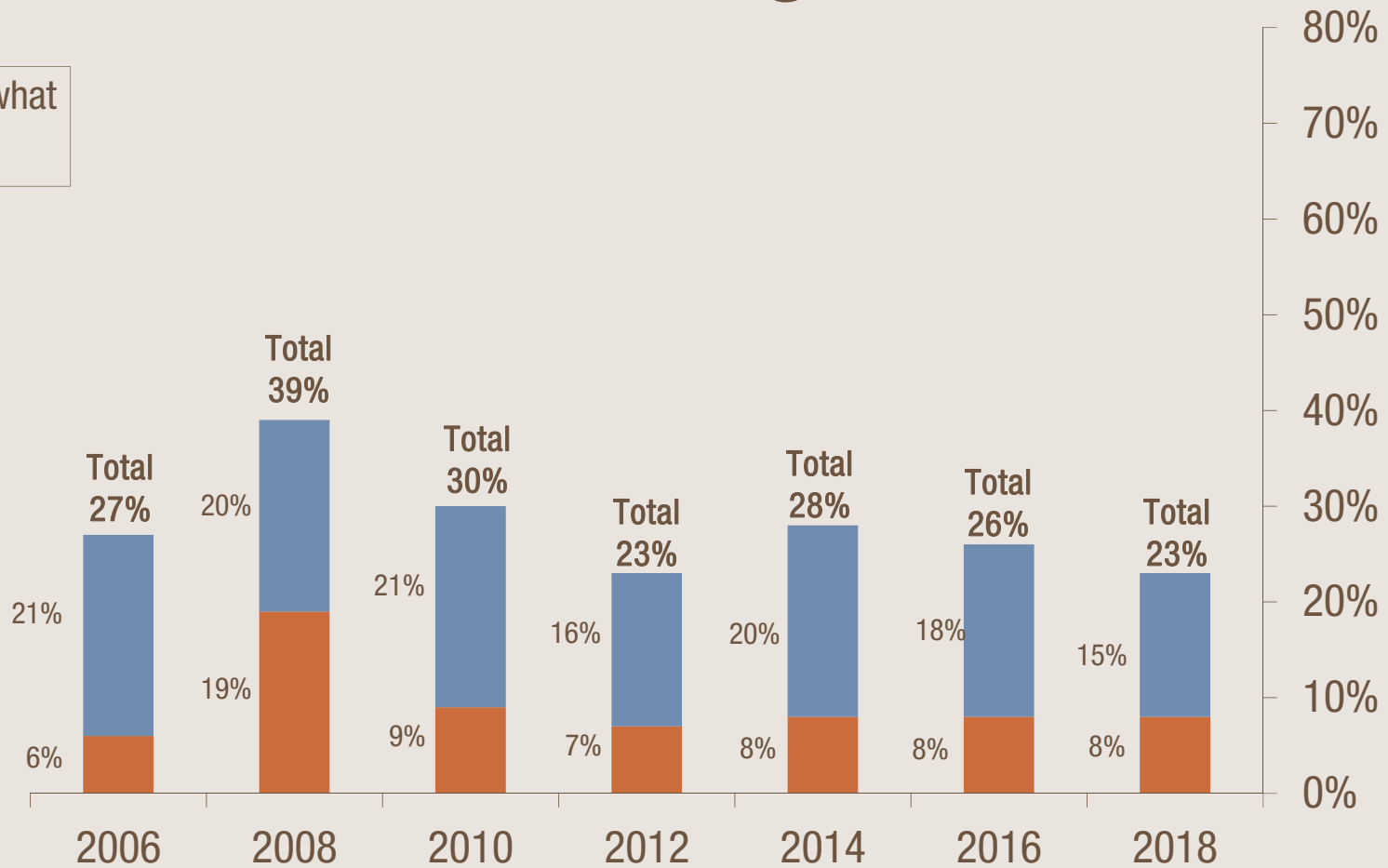
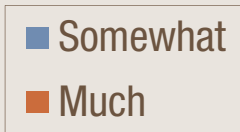


# Perception of Tax Burden “About Right”

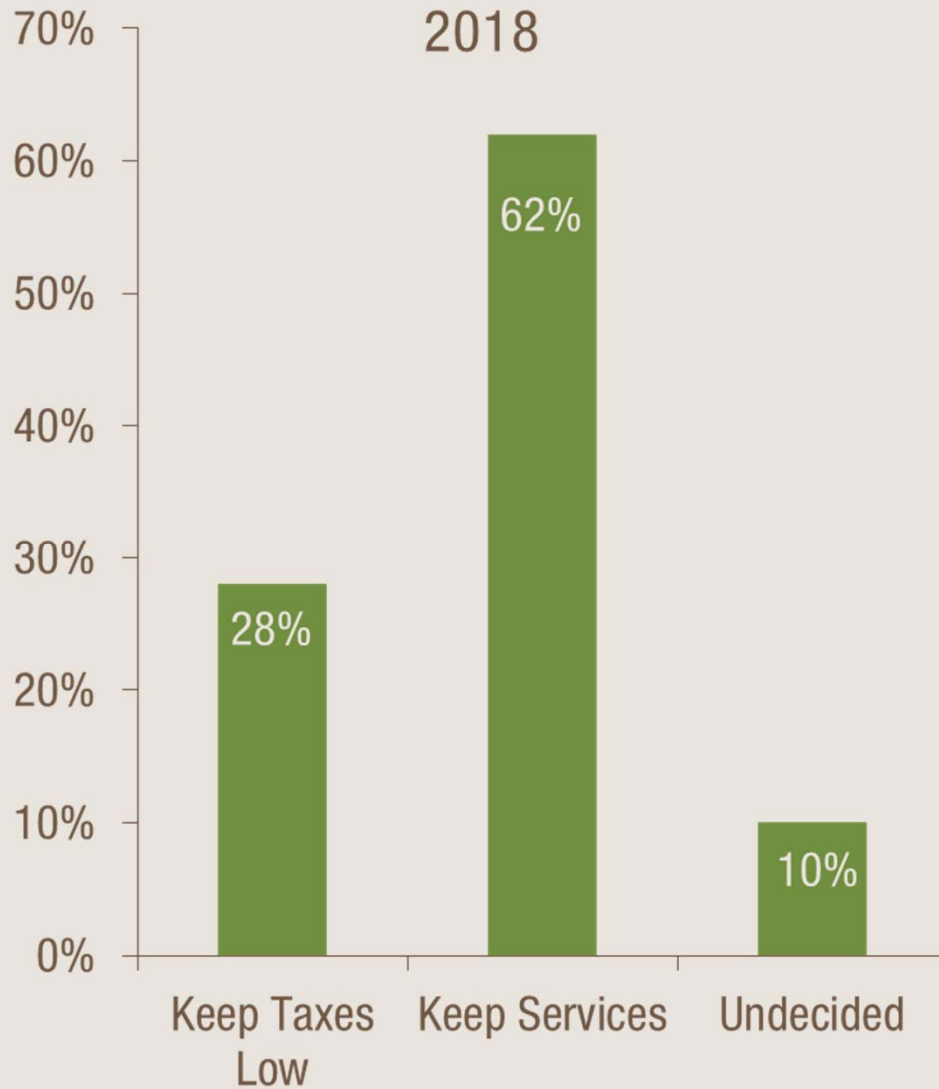


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# Perception of Tax Burden Total “Too High”



# Taxes vs. Service Levels

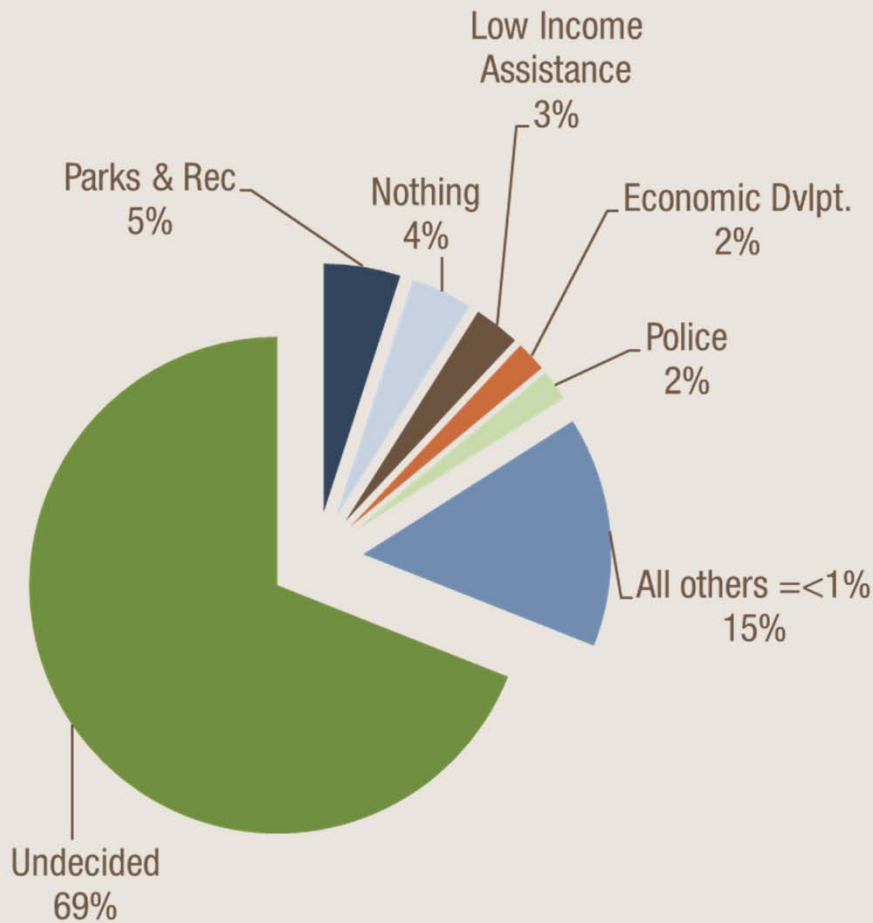


	Keep Taxes Low	Keep Services	Undecided
2018	28%	62%	10%
2016	30%	61%	9%
2014	37%	53%	10%
2012	43%	51%	6%
2010	58%	38%	4%
2008	53%	37%	10%
2006	44%	49%	7%





# Where to Cut if Needed?



Parks & Recreation again tops the list, but has shown substantial decline

2018	5%
2016	7%
2014	8%
2012	17%
2010	12%
2008	28%
2006	32%

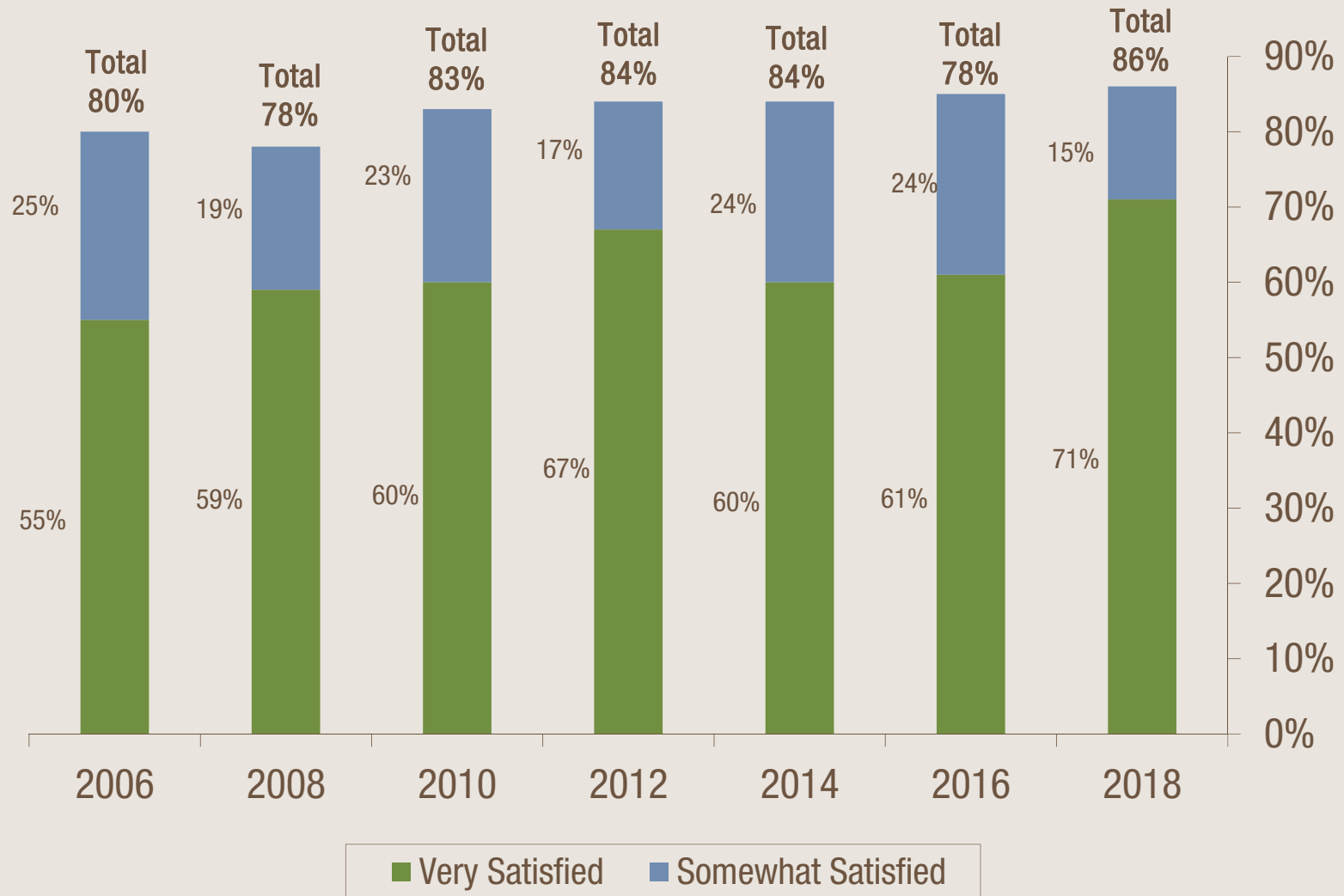


# Contact With a County Department

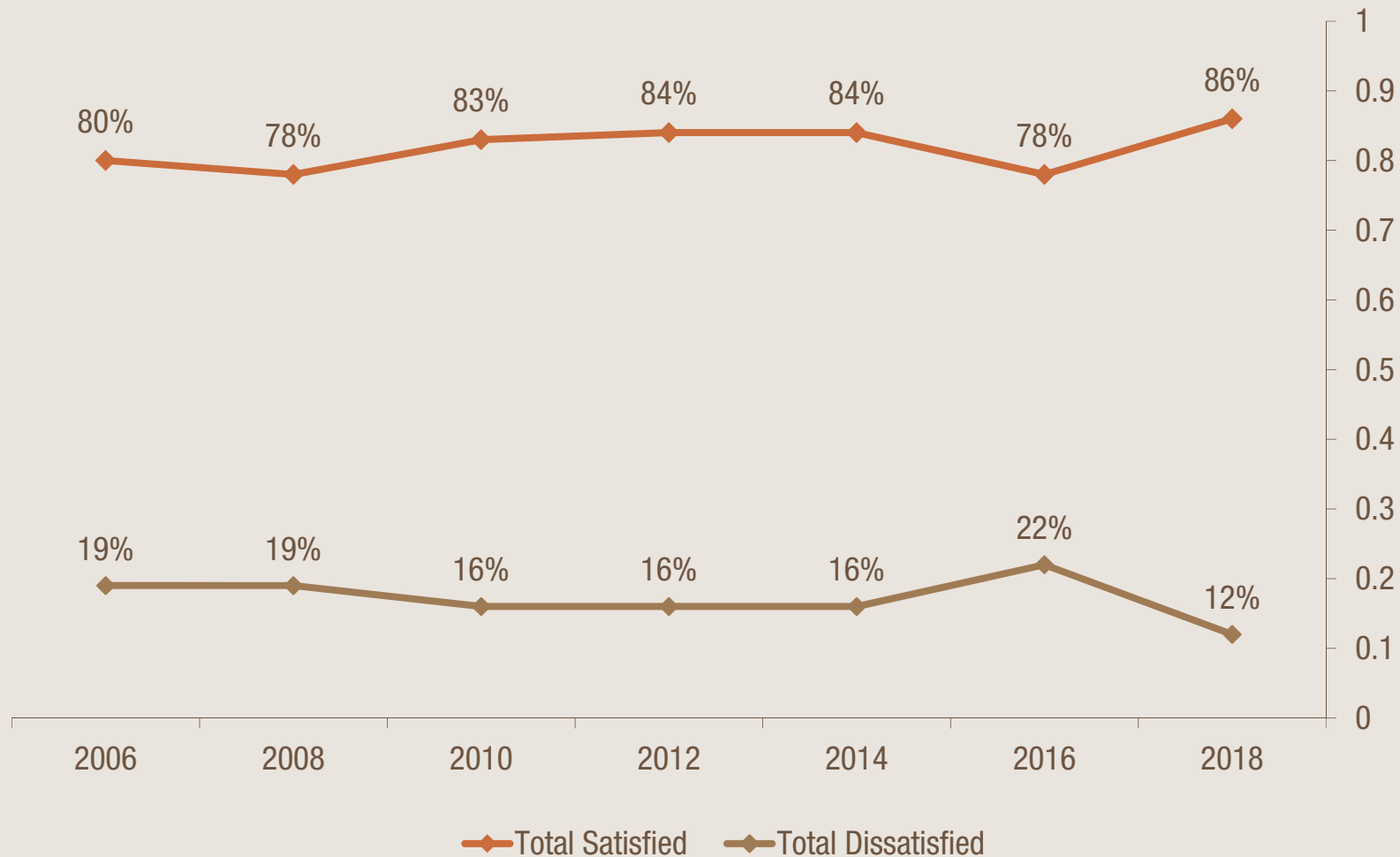
	2018	2016	2014	2012	2010	2008	2006
“Yes” respondent or hh member	31%	26%	31%	29%	30%	32%	37%
“No”	68%	73%	68%	71%	69%	63%	61%
Undecided/ Don't know	1%	1%	1%	---	1%	5%	6%



# Satisfaction With County Response

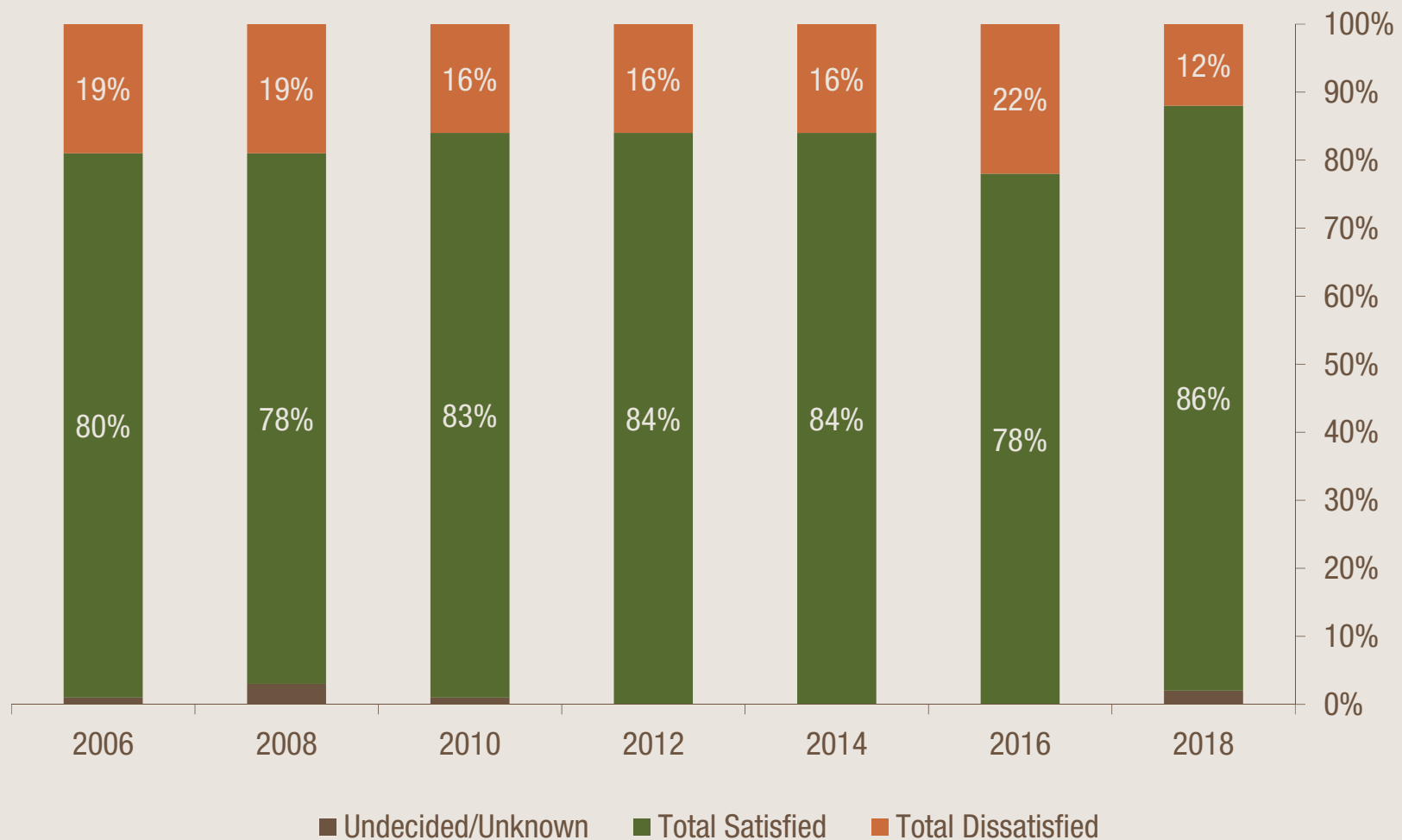


# Satisfaction With County Response



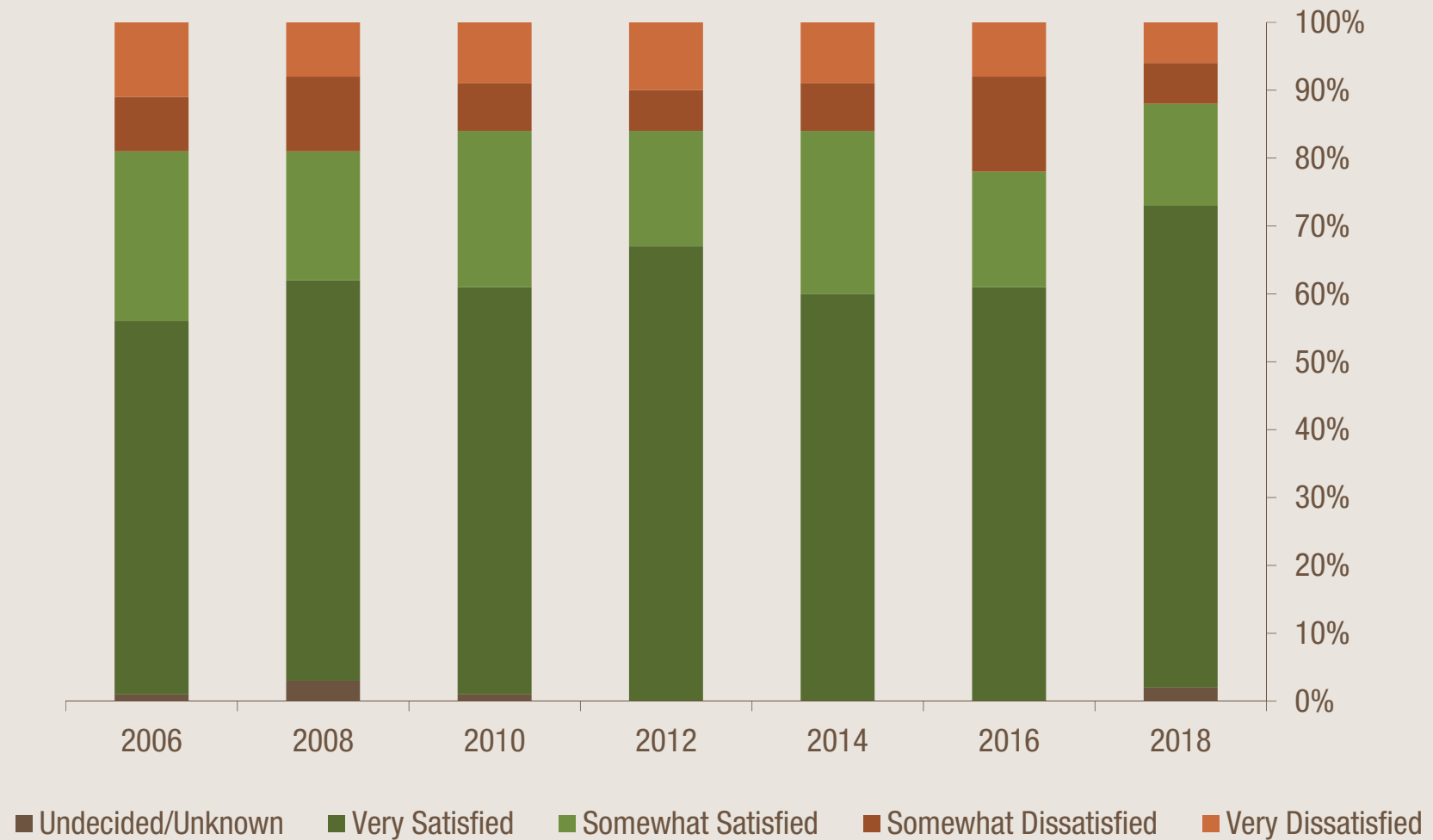
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# Satisfaction With County Response

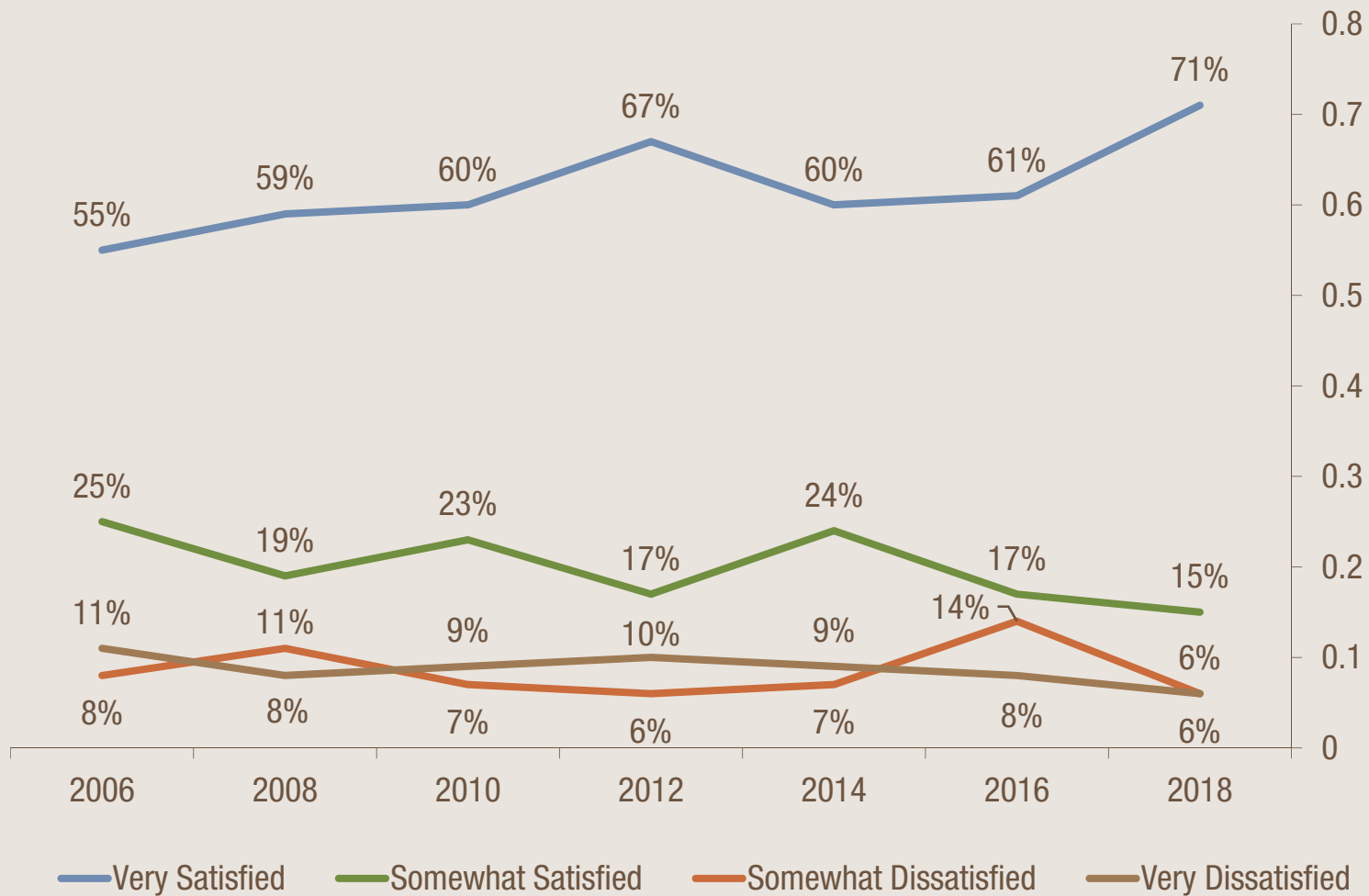


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# Satisfaction With County Response



# Satisfaction With County Response



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# Enough, Too Much or Should More be Done?

Top 3 Ranked by 2018 Total “More” Order	More	
	TOTAL	Much
<b>1 Providing mental health services</b>	<b>43%</b>	<b>24%</b>
Ranking in 2016 - 1	40%	22%
Ranking in 2014 - 2	23%	10%
Ranking in 2012 - 5	20%	7%
Ranking in 2010 – 8	22%	7%
<b>2 Keeping county residents informed about programs &amp; services</b>	<b>37%</b>	<b>16%</b>
Ranking in 2016 - 2	39%	11%
Ranking in 2014 – 1	40%	10%
Ranking in 2012 – 2	27%	14%
Ranking in 2010 – 2	41%	12%
<b>3 Providing substance abuse prevention and treatment services</b>	<b>31%</b>	<b>14%</b>
Ranking in 2016 - 3	24%	7%
Ranking in 2014 - 6	18%	4%
Ranking in 2012 - 5	20%	7%
Ranking in 2010 – 8	22%	7%



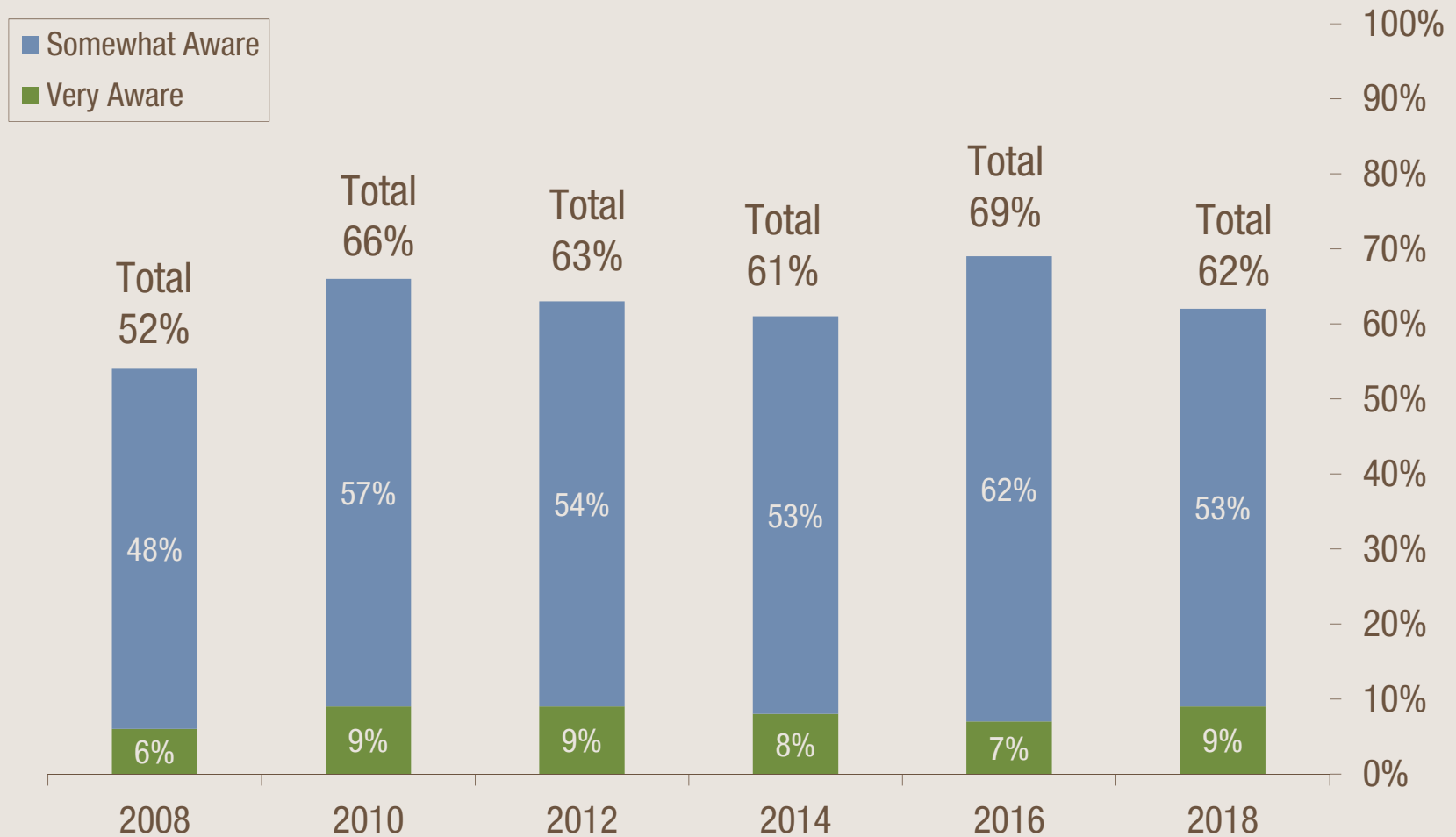


# Enough, Too Much or Should More be Done?

Items 4 thru 6 Ranked by 2018 Total “More” Order	More	
	TOTAL	Much
<b>4 Working w/local govt to plan development</b>	<b>27%</b>	<b>12%</b>
Ranking in 2014– 6	17%	5%
Ranking in 2014– 5	20%	4%
Ranking in 2012– 5	26%	10%
Ranking in 2010 – 5	29%	5%
<b>5 Promoting Ottawa County as a welcoming place for diverse populations. (New question in 2018)</b>	<b>24%</b>	<b>10%</b>
<b>6 Providing programs for juvenile offenders separate from adult prison programs</b>	<b>22%</b>	<b>9%</b>
Ranking in 2016 – 4	24%	6%
Ranking in 2014 – 3	21%	5%
Ranking in 2012 – 8	17%	5%
Ranking in 2010 – 7	23%	5%



# Self-Reported Awareness of County Activities



# Have You Received Information About County Government From ... in the Past Year?

	YES	2016
Mailed Info	66%	63%
TV News	54%	64%
Newspaper	54%	62%
Radio News	49%	41%
Ottawa Co. Website	41%	35%
Brochures in Co. Offices	30%	31%
Social Networks	23%	16%
Community Presentations	18%	23%
E-mailed Information	17%	18%
Board & Committee Meetings	13%	14%
Text Messages	5%	5%



# From Where Do You Receive Most Information About Ottawa County?

	2018	2016
Newspaper	21%	25%
Mailed Information	16%	12%
Ottawa Co. Website	15%	11%
Television News	12%	17%
Social Networks	8%	5%
Word of Mouth	8%	8%
Radio News	6%	8%
E-mailed Information	4%	4%
Brochures in Co. Offices	3%	4%
Board & Committee Meetings	1%	2%



# From Where Would You Prefer Information About Ottawa County?

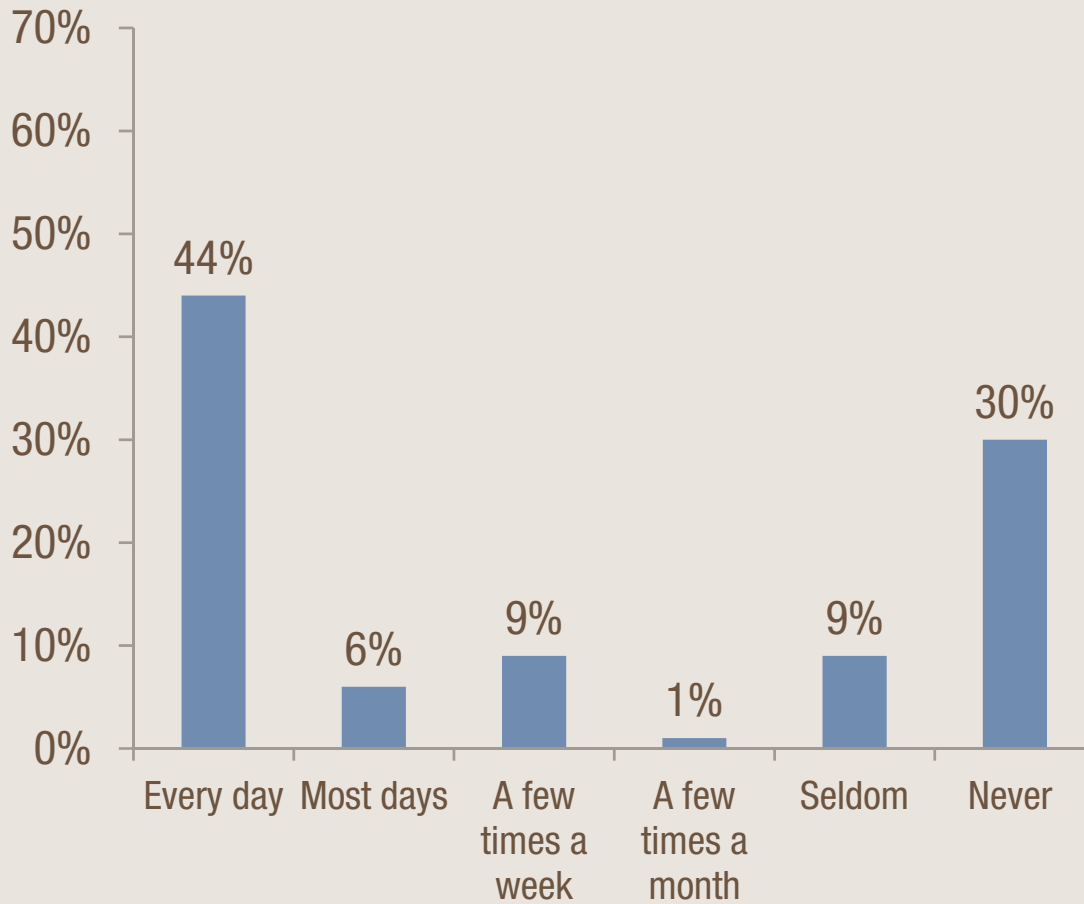
	2018	2016	2014	2012	2010
Mail	28%	24%	19%	14%	14%
Email	15%	15%	1%	-	-
Newspaper	14%	19%	25%	30%	35%
Social Networks	11%	7%	7%	3%	2%
Ottawa Co. Website	11%	12%	16%*	14%*	14%*
Television News	9%	11%	13%	15%	13%
Radio News	4%	5%	5%	11%	10%
Word of Mouth	2%	2%	6%	7%	6%
Brochures in Co. Offices	1%	2%	-	-	-

\*Option was listed as “The Internet” instead of Ottawa County Website.



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# Social Network Use



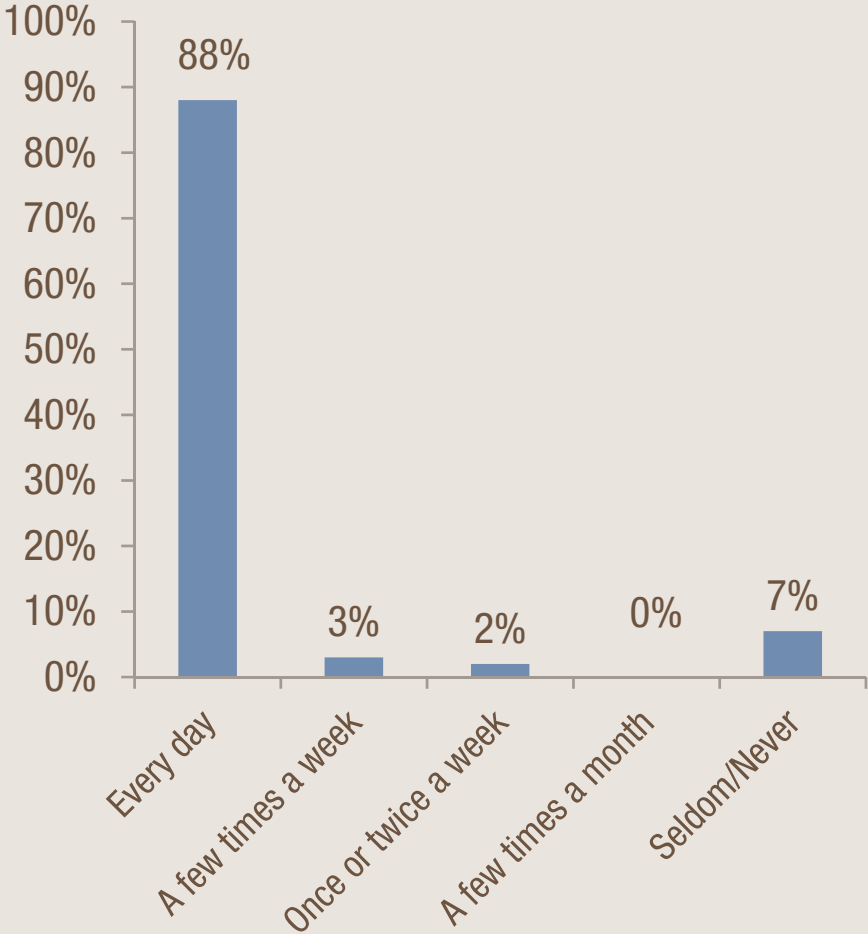
	Use at least a few times a week:	Use every day
2018	59%	44%
2016	52%	36%
2014	47%	35%
2012	46%	29%
2010	30%	18%

Continued increases in frequency of social network use.



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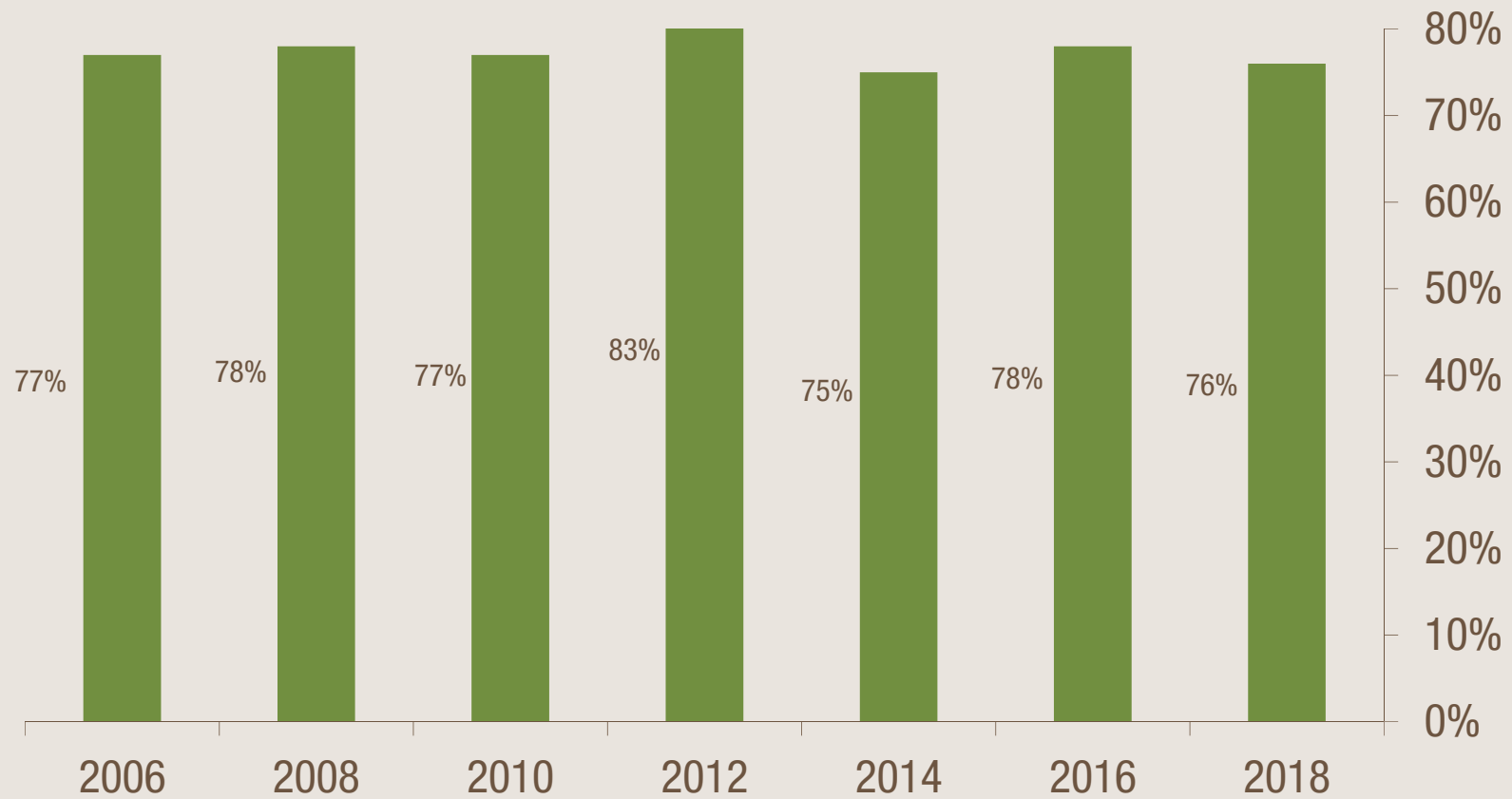
# Internet Use



	Use at least 1-2x a week:	Use every day
2018	93%	88%
2016	89%	80%
2014	89%	84%
2012	89%	81%
2010	82%	75%
2008	82%	70%
2006	80%	67%



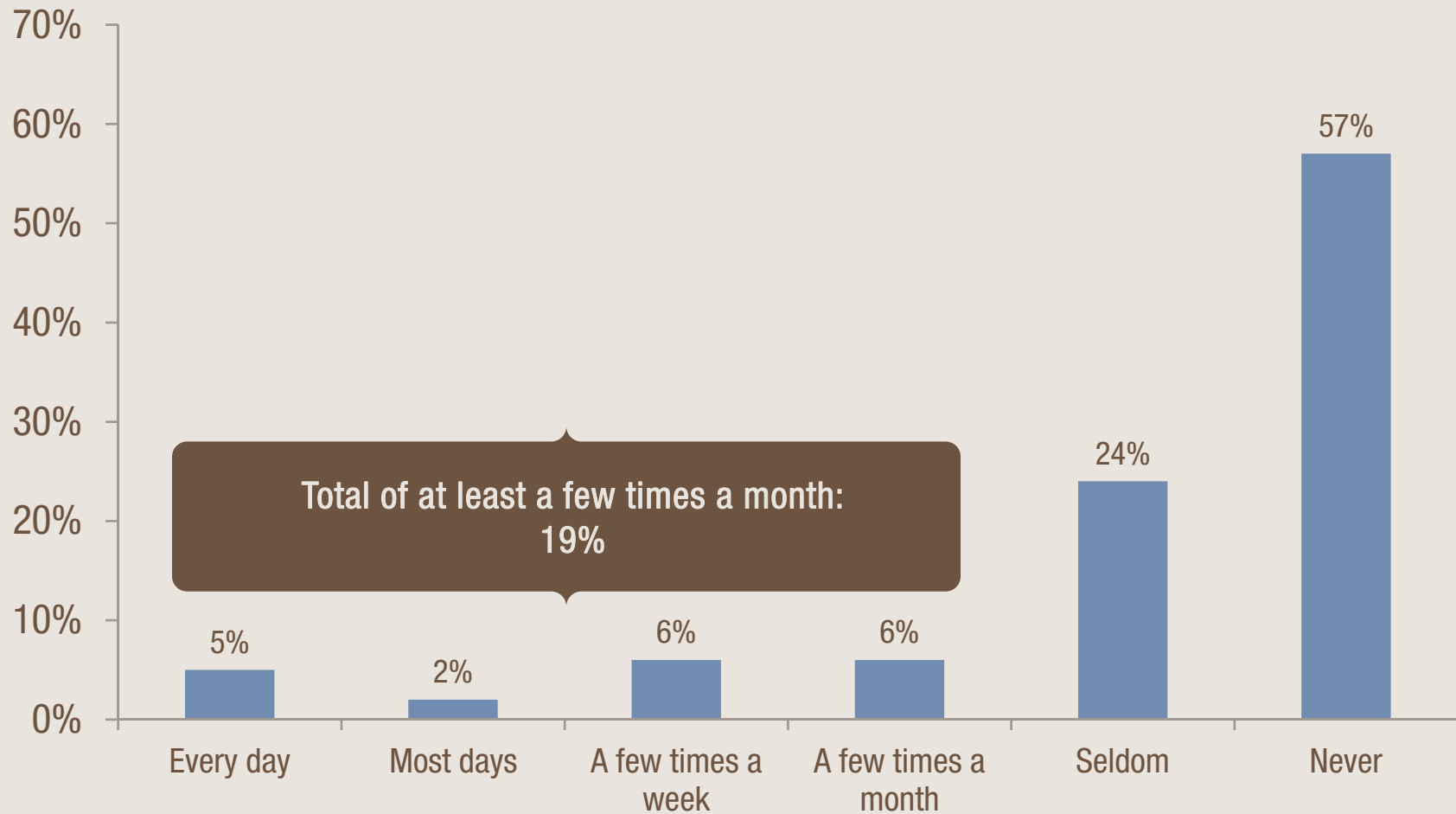
# Rating of miOttawa.org “Excellent/Pretty Good”



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# Express Bus: Hypothetical Frequency of Ridership



**Ottawa County Citizen Survey**  
**June 2018**

Presented by:

**EPIC ■ MRA**

**EXECUTIVE SUMMARY**  
**AND**  
**DEMOGRAPHIC ANALYSIS**

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## METHODOLOGY

**EPIC ▪ MRA** administered interviews with 400 registered voters residing in Ottawa County, Michigan, from April 23<sup>rd</sup> through April 26<sup>th</sup>, 2016. Respondents were selected utilizing an interval method of randomly selecting records of published residential telephone numbers. In addition, a commercially available list of cell phones designated as in the possession of Ottawa County residents was obtained. Thirty percent of the sample, or 120 interviews, were completed via cell phone contact. The sample was stratified so that every area of the county was represented in the sample according to its contribution to a general election turnout. Interviews were terminated if the respondent indicated that he or she had not voted in at least one of the two most recent even-year November general elections.

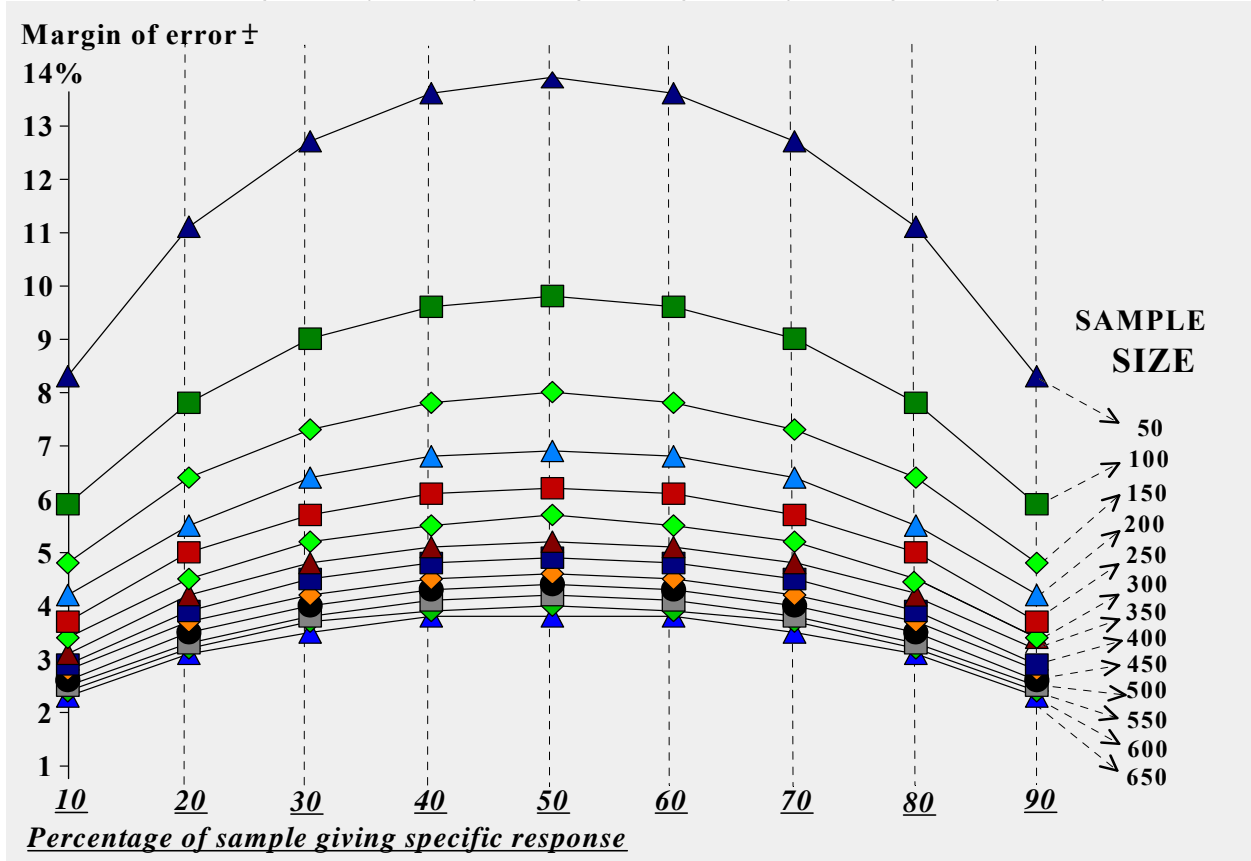
In interpreting survey results, all surveys are subject to error; that is, the results of the survey may differ from those that would have been obtained if the entire population was interviewed. This “margin of error” quantifies the degree to which random sampling will differ from a survey of the entire population, taking into account, among other things, the disposition of individuals who do not complete the interview. Put another way, the opinions of those who are not randomly selected or who decline to be interviewed, are no more or less likely to be different – within the margin of error – than the opinions of those who complete an interview and are included in the sample. The size of sampling error depends on the total number of respondents to the particular question.

For example, 51 percent of all 400 respondents reported they believed Ottawa County government was doing “Enough” in: *Working with local governments to best plan commercial and residential development so excessive growth and sprawl can be avoided* (Question 39). As indicated in the chart below, this percentage would have a sampling error of plus or minus 4.9 percent. This means that with repeated sampling, it is very likely (95 times out of every 100), the percentage for the entire population would fall between 55.9 percent and 46.1 percent, hence 50 percent  $\pm 4.9$  percent.

For analysis purposes, the county geography was broken down into five regions. Where variations in responses are found among or between regions, it is noted in the textual report. A chart illustrating the jurisdictional components of each of the regions can be found in the appendix.

EPIC • MRA SAMPLING ERROR BY PERCENTAGE (AT 95 IN 100 CONFIDENCE LEVEL)

SAMPLE SIZE:	<i>Percentage of sample giving specific response</i>								
	<u>10</u>	<u>20</u>	<u>30</u>	<u>40</u>	<u>50</u>	<u>60</u>	<u>70</u>	<u>80</u>	<u>90</u>
	% margin of error ±								
650	2.3	3.1	3.5	3.8	3.8	3.8	3.5	3.1	2.3
600	2.4	3.2	3.7	3.9	4.0	3.9	3.7	3.2	2.4
550	2.5	3.3	3.8	4.1	4.2	4.1	3.8	3.3	2.5
500	2.6	3.5	4.0	4.3	4.4	4.3	4.0	3.5	2.6
450	2.8	3.7	4.2	4.5	4.6	4.5	4.2	3.7	2.8
400	2.9	3.9	4.5	4.8	4.9	4.8	4.5	3.9	2.9
350	3.1	4.2	4.8	5.1	5.2	5.1	4.8	4.2	3.1
300	3.4	4.5	5.2	5.5	5.7	5.5	5.2	4.5	3.4
250	3.7	5.0	5.7	6.1	6.2	6.1	5.7	5.0	3.7
200	4.2	5.5	6.4	6.8	6.9	6.8	6.4	5.5	4.2
150	4.8	6.4	7.3	7.8	8.0	7.8	7.3	6.4	4.8
100	5.9	7.8	9.0	9.6	9.8	9.6	9.0	7.8	5.9
50	8.3	11.1	12.7	13.6	13.9	13.6	12.7	11.1	8.3



## EXECUTIVE SUMMARY

EPIC ▪ MRA was commissioned in 2018 by the Ottawa County Board of Commissioners to measure public opinion about county government operations in a “customer satisfaction” survey in what is the seventh in a series of biennial studies begun in 2006. In addition to time series questions posed in each of the prior tests, there were questions unique to and timely for the calendar year during which the survey was conducted. For instance, surveys in prior years included questions concerning replacement of lost state revenue sharing dollars, farmland preservation issues, and where responsibility for county roads should rest, among others. In the 2018 study, questions measuring “Net promoter” scores, and county efforts to make the area a welcoming place for diverse populations, were added.

As noted, similar studies were conducted on behalf of the county in 2016, 2014, 2012, 2010, 2008, and in 2006, with most of the questions replicated in the 2018 survey. Throughout the following analysis, differences in outcomes between the 2018 results and prior studies – particularly the more recent studies – are discussed where appropriate.

### -- Questionnaire Frame

An obvious starting point for gauging “customer satisfaction” is to inquire about attitudes toward county services in general and to determine if voters perceive, in a broad sense, whether or not things are going well in the county. In addition, measurements of what respondents believe is the biggest problem facing county government and questions about the perceptions of specific county agencies, departments, and programs are instructive. In order to accurately assess public opinion regarding possible tax options, it is necessary to probe attitudes regarding relative tax burden, and to investigate top-of-mind responses to general likes, dislikes, and preferences.

### -- General Observations

#### **The rebound in optimistic outlook first detected in 2012, remains steady/grows**

Citizen anxiety over economic conditions was amply evident from the results of the surveys conducted in 2008 and 2010, and this angst served to color attitudes toward about a wide spectrum of county government activities. In short, deep concern about respondents’ personal financial well-being led to an unusually pessimistic view of all levels of government. Predictably, the dissatisfaction was expressed most acutely in relation to the national government, but the heightened negative outlook toward county and local governments was still

palpable. The 2012 study yielded data that indicated the impact of the Great Recession of '08 was beginning to subside (or for many, just becoming the “new normal”) with responses to questions about whether or not a named jurisdiction (i.e. state, county, township/city) was headed in the “right direction” vs. being on the “wrong track” suggesting much greater optimism – particularly in regard to county and local governments. Data from the 2018 survey clearly indicates that the less hostile sentiment toward governmental entities first seen in 2012 and repeated in 2014 and 2016 were not aberrations but rather, reflective of a more deep-seated sentiment.

In addition to the right direction/wrong track tests, responses to the 2018 survey questions asking respondents to identify the biggest issue to be addressed by their county and local government, and to select the most pressing issue from a roster of possible issues of concern shows that worry over the economy has greatly abated. In 2012, “Jobs and the economy” was – by far – the most mentioned/selected issue area of concern in both the open-ended and closed end questions on the topic. The 2014 survey saw “economy and jobs” recede somewhat in importance but remain a significant concern. In 2016, “economy and jobs” was eclipsed by “Roads” as the top issue concern cited in both the open-ended top-of-mind question and the closed end roster of nine possible issue areas from which to select, with “economy and jobs” dropping significantly in importance. The 2018 results show a continuation of that shifting of top issues of concern.

Questions and responses that fall under the general rubric of “the economy” run throughout the survey and are detailed in the later section offering a question-by-question illustration of outcomes. Three of these questions, however, are important to highlight in this summary in order to substantiate the assertion that the reduced anxiety residents expressed about both public and personal fiscal matters first exhibited in 2012 has, indeed, carried over through the intervening six years.

## **--Other measurements relating to economic outlook**

### **Higher importance placed on government services**

One bellwether question asks respondents which of two statements comes closer to their view: A statement saying that:

*“ . . . it is important to maintain current county service levels even if it means having to pay higher taxes”;*

Or, a statement expressing the view that:

*“. . . it is important to keep taxes and fees as low as possible, even if it means reducing county services and programs”.*

In 2008 and 2010, solid majorities of respondents opted for the “keep taxes low” statement as being closer to their view and even in the pre-recession year of 2006, only a plurality of respondents – 49 percent – opted for the “maintain services” statement. The 2012 survey was the first time a majority of respondents (51 percent) opted for the “maintain services” statement. The 2014 survey saw a slight increase in majority support, moving up two points to 53 percent of all respondents. In 2016, a very strong 61 percent majority opted for the “maintain services” statement versus the 30 percent who selected “keep taxes low” as the statement better expressing their view. For 2018, the data nudge slightly in each trending direction, with 62 percent opting for the “maintain services” statement and 28 percent choosing the “keep taxes low” option. The latter figure of 28 percent “keep taxes low” represents a 15-percentage point drop since 2012.

### **Sensitivity to existing tax burden remains unremarkable**

A standard question used by EPIC ▪ MRA for any survey of constituents of a governmental entity seeks to measure respondents’ attitude toward the taxes they pay in return for the services that are delivered. This question asks respondents to report whether they believe their taxes are “Too high”, “Too low” or, “About right”, in return for what they receive in the way of county services. For those responding, “Too high”, a follow up question is posed, asking if that would be, “Much” or, “Somewhat”, too high. A level in the mid-to-high 20 percent range is the typical result in other recent surveys conducted in other jurisdictions for the overall “Too high” response rate, with fewer than half that total being of the “Much” too high variety.

At 23 percent “Too high” (8 percent “Much” too high), the 2018 measurement on this question falls comfortably in the lower portion of the range and is lower than the levels recorded in 2014 (28 percent) and 2016 (26 percent) and serves to substantiate the assertion that economic concerns have ebbed.



### **Reduced emphasis on economic development programs**

Each of the citizen satisfaction surveys has included a battery of questions which presents the respondents with a roster of county services and asks whether Ottawa County government should be doing “More”, if it’s already doing “Too much” or, if “Enough” is being done in the service area described in the question. Included in the roster of programs, activities and services is, “*Providing effective economic development programs*” and in the 2012 survey, 41 percent of respondents reported their belief that county government should be doing “More” (14 percent “Much” more), placing this activity as the one receiving the highest proportion of “More” responses. In 2014, this number one ranking dropped to number four, with 21 percent of respondents reporting “More” (4 percent “Much” more) should be done in this area.

In the 2016 survey, the ranking for, “*Providing effective economic development programs*”, dropped two slots to sixth out of the eleven then-tested on the, “should-be-doing-more” scale, with 17 percent of all respondents expressing the belief that “More” (3 percent “Much” more) should be done by county government in this venue. For 2018, the results are essentially unchanged from 2016, with economic development ranking seventh out of twelve, garnering 18 percent reporting the county should be doing “More”, 4 percent of which is, “Much” more.

Jumping to the top spot on the 2016 survey’s, “More” ranking scale was, “*Providing mental health services*” – with 40 percent of all respondents reporting “More” (22 percent “Much” more) should be done by county government in this area. This county service retains its top spot in 2018, increasing its “More” proportion by three points to 43 percent, 24 percent of which being the more intense, “Much” more.

### **-- Overall ratings of County Government/Local Government**

Respondents are asked to issue a “Positive” or “Negative” rating for how well their local (City, Township, Village) government is doing in providing basic services, and this question is also asked in regard to Ottawa County government. For local government, the 2018 survey showed a marked increase in the “Positive” rating, moving from a 2016 level of 72 percent to 83 percent in 2018. This latter level is the highest recorded in the last four biennial studies and is the first time over 8-in-10 respondents reported in this way. The increase in “positive” is almost entirely attributable to a sharp decline in “Undecided” responses – from 12 percent to 2 percent – from 2016.

Ottawa County government also recorded a record-high 79 percent “Positive” rating, rising eight points from the level recorded in 2016 and three points higher than the 2012 and 2014 levels. As with the 2018 local government rating, most of the county gain was seen from a significant drop in the number of “Undecided” responses from 2016’s survey.

Following each of the “Positive/Negative” rating questions, respondents are invited to offer their reason for issuing the rating they did. For respondents issuing a “positive” rating, comments such as, “*No problems/Good overall/Quality of Services*”, combine to form a strong plurality of the responses for both the local and county government subjects, with the balance being made up with about a dozen specific service areas (e.g. “*Communication/Public Safety*”) receiving response proportions in the single digits. As for the reasons for a “negative” rating, “*Communication*” ranked the highest in the local government test and *Roads* captured the plurality for county government. The reader is reminded, however, that the small proportion of “negative” ratings for both entities (15 percent – Local; 13 percent – County) produces very small raw numbers of respondents, rendering percentage rankings of the responses somewhat misleading.

### **Other assessments**

Over half of respondents (55 percent) give the county a “Positive” rating for its management of finances, a relatively stable proportion over time. It is important to point out that the 55 percent “positive” does not translate into the balance of responses being “Negative.” Indeed, only 12 percent issued a “negative” with 33 percent being “Undecided” on the question.

When asked to name what they like most about living in Ottawa County, nearly four-in-ten cited, “*Lakes/Rivers/Beaches; Parks and Recreation offerings*”; or, some other aspect of natural and outdoor attractiveness. This result dovetails with the 22 percent plurality naming “Parks & Recreation” as best service provided by Ottawa County government. A strong plurality (41 percent) cited “*Roads*”, in response to an open-ended question asking respondents to cite the one county service most in need of improvement.

For the fourth consecutive survey, 99 percent of respondents reported they felt *Safe* in their neighborhood. An intensity of feeling was offered as an option and 76 percent reported feeling Very safe, again, a proportion that has remained steady over time.

**-- Upshot of the 2018 findings**

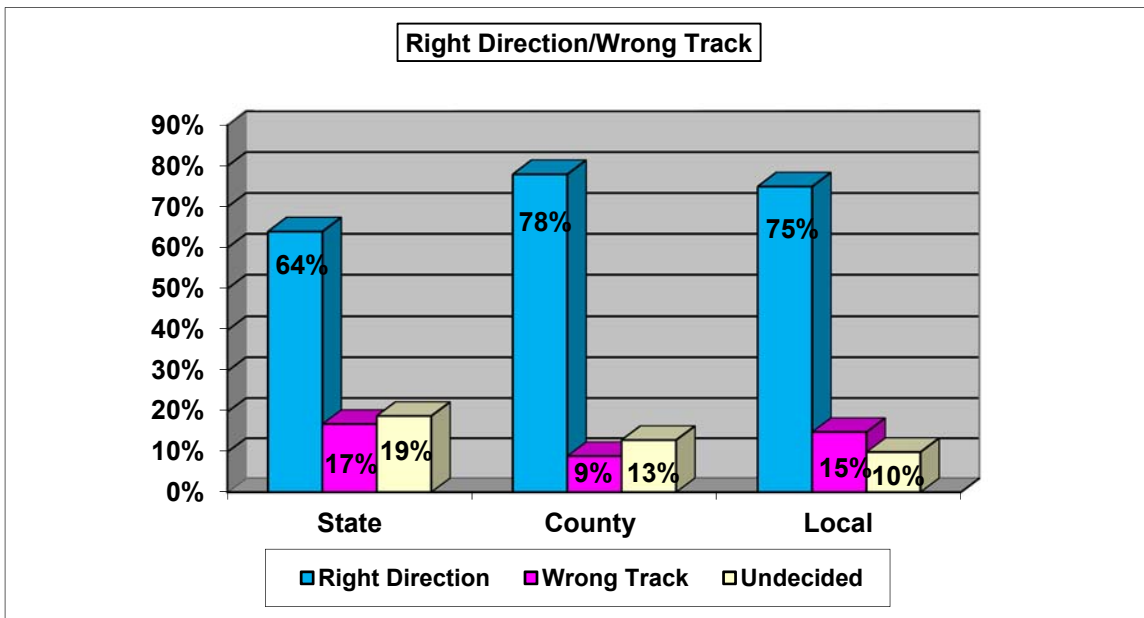
Ottawa County residents remain highly satisfied with the performance of their county government, and to the extent some residents are dissatisfied, it is very diffuse with no consensus – apart from “roads” – about a particular source of their dissatisfaction. This circumstance is a continuation of a trend first hinted at as we emerged from the recession in 2012.

As noted above, “roads” is prominent in the electorate’s consciousness and it would seem the county, as a county entity, has its work cut out for it to address this concern. That is, the county passed a dedicated millage for roads and the governor and legislature ostensibly addressed the issue with legislation passed in the wake of Proposal 1’s drubbing in May of 2015. However, as is certainly not lost on county officials, the finer points of who’s responsible for what when it comes to funding road repair and maintenance is not well-defined in the minds of most voters. Accordingly, county government, having recently received approval for a road millage, is put in the unenviable position of trying to explain in a succinct and understandable way, that the new millage revenue has limited applications and that the indispensable pieces of the picture – adequate state and accompanying federal revenue – will not be fully forthcoming in the foreseeable future.

### QUESTION-BY-QUESTION RESULTS

#### -- Right Direction or Wrong Track? – (Qs. 3-5)

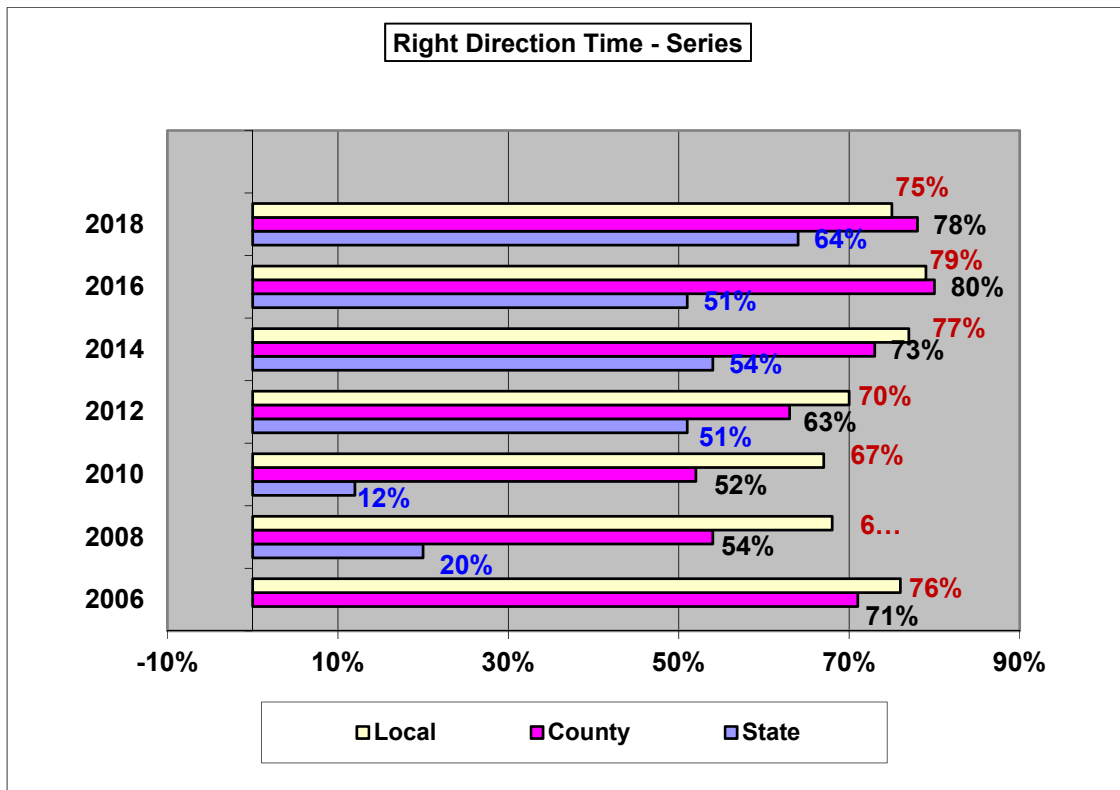
A standard question on many surveys designed to measure citizen satisfaction, the “right direction/wrong track” battery remained a fixture on the 2018 Ottawa County. The question reads: “Overall, do you think that [State of Michigan; Ottawa County; and, the city or township where you live] is headed in the right direction, or, do you think that things are pretty seriously off on the wrong track?” Respondents are asked to answer this question as it applies to the state, county, and their local governments. The chart below illustrates the results for the latest survey:



Subgroups reporting “wrong track” for the county in proportions greater than the norm of 9% included: (Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)

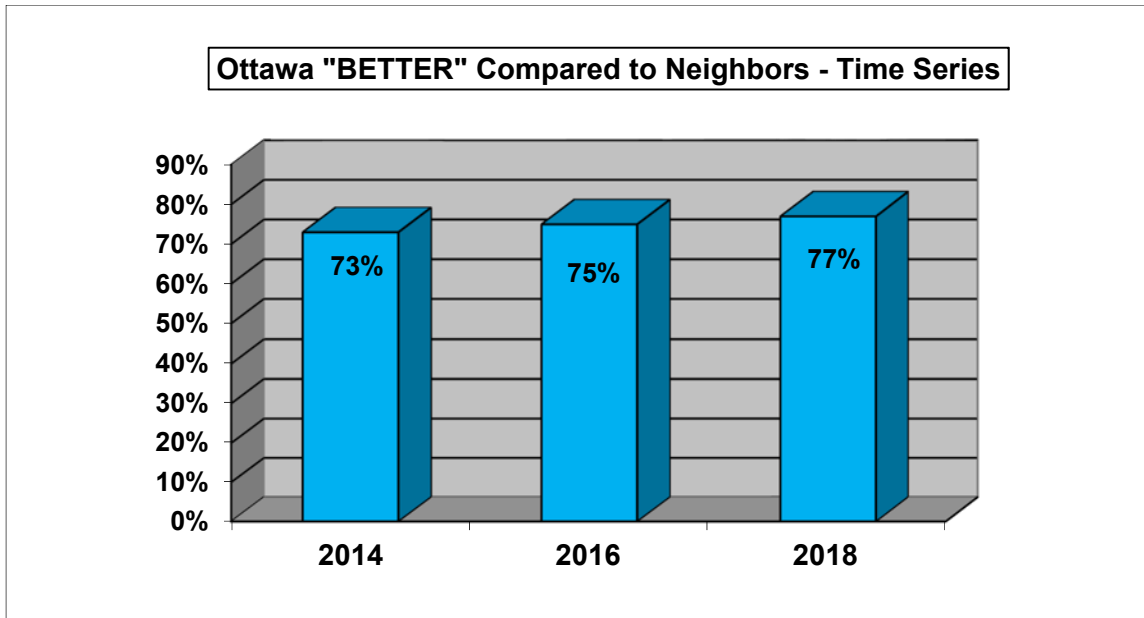
- 40% **Michigan direction – Wrong track**
- 39% **City/Twp. direction – Wrong track**
- 28% **Rating of County Services – Negative**
- 27% **Rate County Financial Mgt. – Negative**
- 26% **Rating of Local Services – Negative**
- 16% **Ottawa compared to others – About the same**
- Ride Express – Weekly/Monthly
- 14% **Taxes – Too high**
- 13% **Region 2 residents**
- Residency tenure – 16-25 yrs.
- Post H.S.

In the 2010 survey, the state posted a dismal 12 percent “right direction” rating but saw a dramatic turnaround in 2012 to 51 percent – staying in the low to mid “50’s” in the two subsequent surveys. The 64 percent “Right track” for the state in 2018 is a remarkable 52 percentage point increase over the past nine years. While not as quite as dramatic as the movement in the state numbers between 2010 and now, the level of “right direction” responses for the county and the local unit also improved, from the 2010 levels by 21 points for the county and 10 points for the local unit. As can be seen in the chart below, the trend has been upward for all governmental entities over the past four survey year tests.



**-- County Compared to Regional Neighbors – (Q. 6)**

Another measurement of how respondents view their status as Ottawa County residents is found in a question introduced in 2014 which asks them to report of they believe Ottawa County is “Better”, “Worse” or, “About the same” as other western Michigan counties. Over three-quarters of respondents (77 percent) reported their belief that Ottawa County was better than neighboring counties, *as a place to live*. Seventeen percent viewed the County as “About the same” with four percent undecided. Only one percent reported a belief that Ottawa County was, “Worse”. With such lopsided results, subset analysis would not be instructive.



-- "Net Promoter" score – (Q. 7)

New for 2018 was a question asking respondents to report on a scale of zero-to-ten – with ten meaning very likely and zero meaning not likely at all – how likely they would be to recommend Ottawa County to others as a good place to move to. The result of this question produced a very high mean score of, 8.601.

<b>HOW LIKELY TO RECOMMEND OTTAWA CO.</b>				Undec/ Ref	<u>MEAN</u>
<i>NOT AT ALL</i>	<i>VERY</i>				
<u>0 to 4</u>	<u>5</u>	<u>6 to 8</u>	<u>9 &amp; 10</u>		
3%	6%	31%	59%	1%	8.601

*Subgroups reporting "9 & 10" in proportions significantly lower than the norm of 59% included:*

- 30% *Managing finances – Negative*
- 34% *Ottawa comparison – About the same*
- 37% *County services – Negative*
- 40% *City/Twp. Direction – Wrong track*
- Local services – Negative*
- 46% *Michigan direction – Wrong track*
- 50% *Post H.S.*
- 51% *Region 5 residents*
- Vote in local elections – Seldom/Never*
- 52% *Region 2 residents*
- County activities – Unaware*
- 53% *Residency tenure – 25+ yrs.*
- 54% *Taxes – Too high*
- Website visitation – A lot/Some*

## -- County's Strategic Goals – (Qs. 8-11)

The battery of questions about strategic goals was first posed in 2008 and in each survey year thereafter. Respondents are informed that the Board of Commissioners has a strategic plan that includes four major goals, which are then recited in random order. After hearing each of them, respondents are asked to indicate if they believe the individual goal should be a “Top priority”, “Important but not a top priority”, “Slightly important” or, “Not important at all”.

As evidenced by the relative positioning of the several goals in the table below, each goal is viewed by county residents as being at least “Important” by very high proportions. Also evident is the fact that maintenance of fiscal and economic health consistently tops the list and it is also noted that improving county services and enhancing communications are almost exclusively the only goals that consistently register double digits for being “slightly” important – at least relative to the other two goals.

Another interesting observation is that despite other ample evidence in the survey that the public is no longer as subjectively pre-occupied with “the economy and jobs” as they once were, maintenance of the county’s economic health and strong financial position continue to be viewed by county residents as being of highest importance.

*“To maintain and improve the strong financial position of the county”*, achieved its highest “Total Important” rating of 94 percent, in 2008, with, *“To continually improve the county’s organization and services”*, posting the lowest rating of 76 percent in 2012. These two strategic plan goals also occupy the polar positions for “Top Priority” at 60 percent for, . . . *“maintain[ing] and improve[ing] the strong financial position of the county”* in the 2008 study; and, 22 percent for, . . . *“continually improve[ing] the county’s organization and services”*, in 2014.

The tables below show the results from 2008 through 2018 on these stated strategic planning goals:

<b>Sorted 2018 highest to lowest “Total Important”</b>	<b><u>Top Prior</u></b>	<b><i>TOTAL</i> <u>Impt</u></b>	<b><u>Slight Impt</u></b>	<b><u>Not Impt</u></b>	<b><u>Und/ Ref</u></b>
To maintain and improve the strong financial position of the county.	43%	<b>88%</b>	8%	2%	2%
Ranking in 2016 - 2	38%	<b>90%</b>	6%	2%	2%
Ranking in 2014 - 1	26%	<b>89%</b>	9%	1%	1%
Ranking in 2012 - 1	45%	<b>90%</b>	7%	2%	1%
Ranking in 2010 - 1	48%	<b>91%</b>	6%	1%	2%
Ranking in 2008 - 1	60%	<b>94%</b>	3%	1%	2%
To contribute to the long-term, economic, social and environmental health of the County.	47%	<b>87%</b>	9%	3%	1%
Ranking in 2016 - 1	51%	<b>90%</b>	8%	2%	1%
Ranking in 2014 - 2	34%	<b>88%</b>	8%	2%	2%
The pre-2014 question read: <i>To contribute to a healthy physical, economic and community environment.</i>					
Ranking in 2012 - 2	45%	<b>90%</b>	7%	2%	1%
Ranking in 2010 - 2	35%	<b>82%</b>	13%	2%	3%
Ranking in 2008 - 2	54%	<b>87%</b>	8%	2%	3%
To maintain and enhance communication with citizens, employees, and other stakeholders.	31%	<b>80%</b>	13%	5%	2%
Ranking in 2016 - 3	36%	<b>86%</b>	10%	3%	1%
Ranking in 2014 - 4	23%	<b>77%</b>	19%	3%	1%
Ranking in 2012 - 3	31%	<b>81%</b>	16%	3%	0%
Ranking in 2010 - 4	27%	<b>82%</b>	14%	3%	1%
Ranking in 2008 - 3	48%	<b>85%</b>	10%	3%	2%
To continually improve the county’s organization and services.	35%	<b>79%</b>	15%	4%	2%
Ranking in 2016 - 4	37%	<b>85%</b>	11%	3%	1%
Ranking in 2014 - 3	22%	<b>80%</b>	15%	3%	2%
Ranking in 2012 - 4	33%	<b>76%</b>	18%	4%	2%
Ranking in 2010 - 3	29%	<b>79%</b>	16%	4%	1%
Ranking in 2008 - 4	45%	<b>87%</b>	10%	1%	2%



<b>Sorted 2018 highest to lowest “Top Priority”</b>	<b><u>Top Prior</u></b>	<b><u>TOTAL Impt</u></b>	<b><u>Slight Impt</u></b>	<b><u>Not Impt</u></b>	<b><u>Und/ Ref</u></b>
To contribute to the long-term, economic, social and environmental health of the County.	<b>47%</b>	87%	9%	3%	1%
Ranking in 2016 - 1	<b>51%</b>	90%	8%	2%	1%
Ranking in 2014 - 1	<b>34%</b>	88%	8%	2%	2%
Ranking in 2012 - 1	<b>45%</b>	90%	7%	2%	1%
Ranking in 2010 - 2	<b>35%</b>	82%	13%	2%	3%
Ranking in 2008 - 2	<b>54%</b>	87%	8%	2%	3%
To maintain and improve the strong financial position of the county.	<b>43%</b>	88%	8%	2%	2%
Ranking in 2016 - 2	<b>38%</b>	90%	6%	2%	2%
Ranking in 2014 - 2	<b>26%</b>	89%	9%	1%	1%
Ranking in 2012 - 1	<b>45%</b>	90%	7%	2%	1%
Ranking in 2010 - 1	<b>48%</b>	91%	6%	1%	2%
Ranking in 2008 - 1	<b>60%</b>	94%	<b>3%</b>	1%	2%
To continually improve the county’s organization and services.	<b>35%</b>	79%	15%	4%	2%
Ranking in 2016 – 4	<b>37%</b>	85%	11%	3%	1%
Ranking in 2014 – 4	<b>22%</b>	80%	15%	3%	2%
Ranking in 2012 - 3	<b>33%</b>	76%	18%	4%	2%
Ranking in 2010 – 3	<b>29%</b>	79%	16%	4%	1%
Ranking in 2008 – 4	<b>45%</b>	87%	10%	1%	2%
To maintain and enhance communication with citizens, employees, and other stakeholders.	<b>31%</b>	80%	13%	5%	2%
Ranking in 2016 - 3	<b>36%</b>	86%	10%	3%	1%
Ranking in 2014 - 3	<b>23%</b>	77%	19%	3%	1%
Ranking in 2012 - 4	<b>31%</b>	81%	16%	3%	0%
Ranking in 2010 – 4	<b>27%</b>	82%	14%	3%	1%
Ranking in 2008 – 3	<b>48%</b>	85%	10%	3%	2%

### -- Biggest Problem, “Top of Mind” & Prompted – (Qs. 12-13)

Among the many indicators pointing to the fact that transportation infrastructure has supplanted the economy and jobs as the issue of greatest importance in the minds of the public, perhaps the best evidence lies in the data emerging from the “biggest problem” questions. In the first of these, respondents are asked to name, “*the single most important problem or issue facing the residents of your community that your local city, township, village or county government must address?*” Nearly one-in-five (19 percent) cited “Roads” as the single most important issue that first came to mind – a 2018 proportion identical to the 2014 and 2016 measurements.

“Unemployment/Jobs” garnered only 3 percent of the responses in 2018, being supplanted as the second-most mentioned problem by, “Affordable housing” at 6 percent, a concern category that garnered only 2 percent of open-ended responses in 2016. These top-of-mind concerns were followed by “Taxes too high”, “Intrusive government” and, “Wasteful spending”, each posting 5 percent of respondents’ replies. Compare these findings with those of previous years when “Unemployment/Jobs” topped the list of issues that were most urgent in 2008 at 27 percent, 2010 at 32 percent, 2012 at 21 percent and even the pre-recession year of 2006 at 13 percent, and it is clear that concerns about personal economic insecurity, while still important, no longer occupy front-and-center consciousness.

*Subgroups reporting “Roads” in proportions greater than the norm of 19% included:*

34% *Biggest problem (prompted) – Roads*  
 24% *Region 4 voters*  
*Residency tenure – Lifetime*  
*H.S. or less*  
*\$50K - \$75K hh income*

*Subgroups reporting “Affordable Housing” in proportions greater than the norm of 6% included:*

12% *Region 1 residents*  
*Info source preference – Social media*  
 11% *Ottawa direction – Undecided*  
*Women 18-49*  
 10% *County contact – Yes*  
*\$75K - \$100K hh income*  
*College women*

Following the top-of-mind question, respondents are presented with a list of nine issues – identified as areas many residents of Ottawa County say they are concerned about – and are then asked to select which one problem they are most concerned about. The results from this question see an echoing of the previous top-of-mind results with, “Maintaining and improving area roads” capturing a 26 percent plurality of responses, up two percentage points from the 2016 measurement and 21 points higher than that recorded in 2008. “Providing economic development and jobs” ranked sixth on the list at 6 percent – a level down 9 points from 2016 and down a remarkable 39 points from 2010.

“Protecting the public from crime and drugs” occupied the second place ranking in 2018, a relative position for this concern that has held steady over the post-recession-year surveys but holding a much less prominent position in years prior to 2010. Ranking third on the list of prompted areas of concern at 15 percent was the, “Availability of affordable housing”. This issue area was first introduced in the 2016 survey but in that study, it garnered only 6 percent of

responses and ranked seventh of the nine issue areas of the possible prompted responses presented. This proportion is two-and-one-half times higher in the 2018 study and given the relatively high proportion of open-ended responses for “affordable housing” recorded in the previous open-ended question (i.e. 6 percent) this appears to be an emerging area of concern for county residents.

2006	2008	2010	2012	2014	2016	2018	ISSUE OF GREATEST PERSONAL CONCERN
5%	7%	8%	11%	18%	24%	<b>26%</b>	Maintaining and improving area roads
5%	14%	6%	13%	16%	14%	<b>18%</b>	Protecting the public from crime and drugs
---	---	---	---	---	6%	<b>15%</b>	Availability of affordable housing
10%	6%	13%	16%	13%	11%	<b>12%</b>	Improving the quality of area schools
10%	9%	12%	12%	16%	12%	<b>9%</b>	Keeping local taxes and fees low
32%	37%	45%	35%	26%	15%	<b>6%</b>	Providing economic development and jobs
3%	6%	3%	5%	4%	8%	<b>6%</b>	Protecting the environment in the area
12%	3%	1%	2%	3%	3%	<b>3%</b>	Controlling traffic congestion
1%	3%	3%	4%	3%	4%	<b>2%</b>	Providing quality basic city, township or county services
---	3%	---	---	---	---	---	More than one [ASK: "But which problem concerns you most?" <b>AND CODE BEST RESPONSE]</b>
3%	3%	1%	2%	1%	4%	<b>3%</b>	Undecided/Refused
11%	5%	5%	---	---	---	---	<i>Controlling unplanned development and sprawl</i>
8%	4%	3%	---	---	---	---	<i>Preserving prime farmland and open space</i>

*Subgroups reporting “Roads” in proportions greater than the norm of 26% included:*

- 41% No college men
- 34% H.S. or less
- 33% Rate County – Negative
- 32% Info source – Newspapers
- Age 35-49
- Men
- 31% Region 4 residents

*Subgroups reporting “Crime” in proportions greater than the norm of 18% included:*

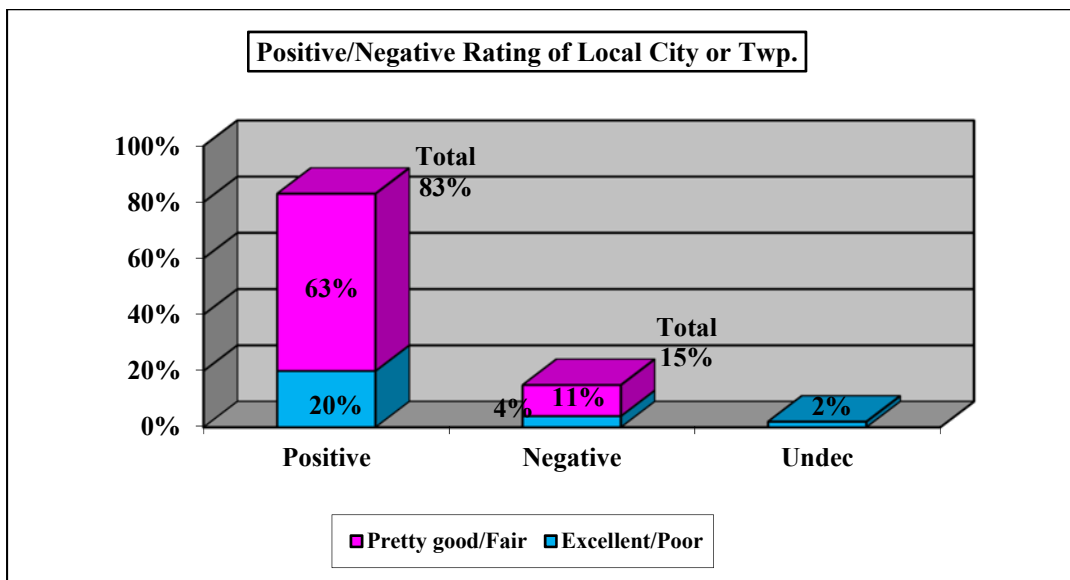
- 32% Use social media – Weekly/Monthly
- 25% Info source preference – Website
- 23% Vote in local elections – Half the time
- 22% Region 4 residents
- Taxes – Too high
- Over \$100K hh income

Subgroups reporting “Housing” in proportions greater than the norm of 15% included:

- 27% City/Twp. direction – Undecided  
Women 18-49
- 26% Age 18-34
- 24% Express Bus – Weekly/Monthly
- 23% Website visitation – A lot/Some
- 22% Vote in local elections – Seldom/Never
- 21% Region 1 residents  
Vote history – One of the last two  
Age 18-49
- 20% Rate local gov’t – Negative  
Financial management – Negative  
Info source preference – Social media  
Women

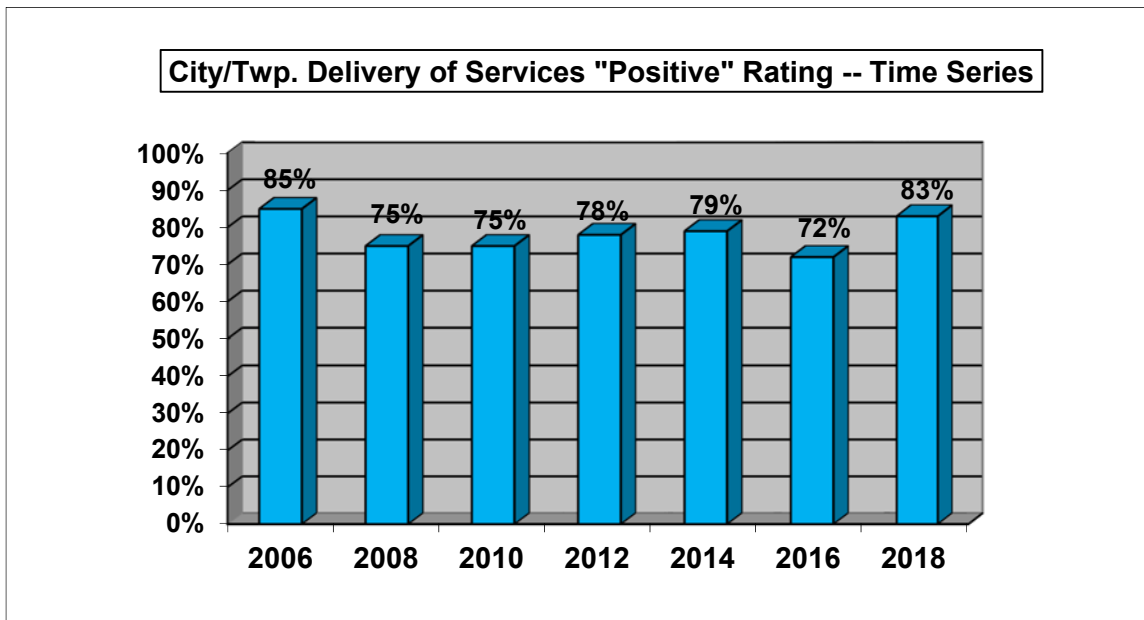
**-- Rate your Local (City/Township/Village) Government - (Q. 14)**

After showing what appears to be an aberrant (albeit mild) drop in “Positive” rating response in 2016 (from 2014’s 79 percent to 72 percent), the 2018 survey shows a strong rebound to 83 percent “Total Positive” for providing basic services – second only to the 85 percent recorded in 2006. It is worth noting, as well, that the “*excellent*” portion of that total remains at the higher levels recorded in more recent surveys and that very few – two percent – were undecided on the question.



Subgroups reporting “negative” in proportions greater than the norm of 15% included:  
 (Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)

- 48% **Local direction – Wrong track**
- 46% **Rate County services – Negative**
- 38% **Financial management. – Negative**
- 28% **Taxes – Too high**
- 26% **Michigan direction – Wrong track**
- 23% **Ottawa comparison – About the same**
- 22% **Residency tenure – 16-25 yrs.**
- 21% **Info source preference -- email**
- Website visitation – A lot/Some



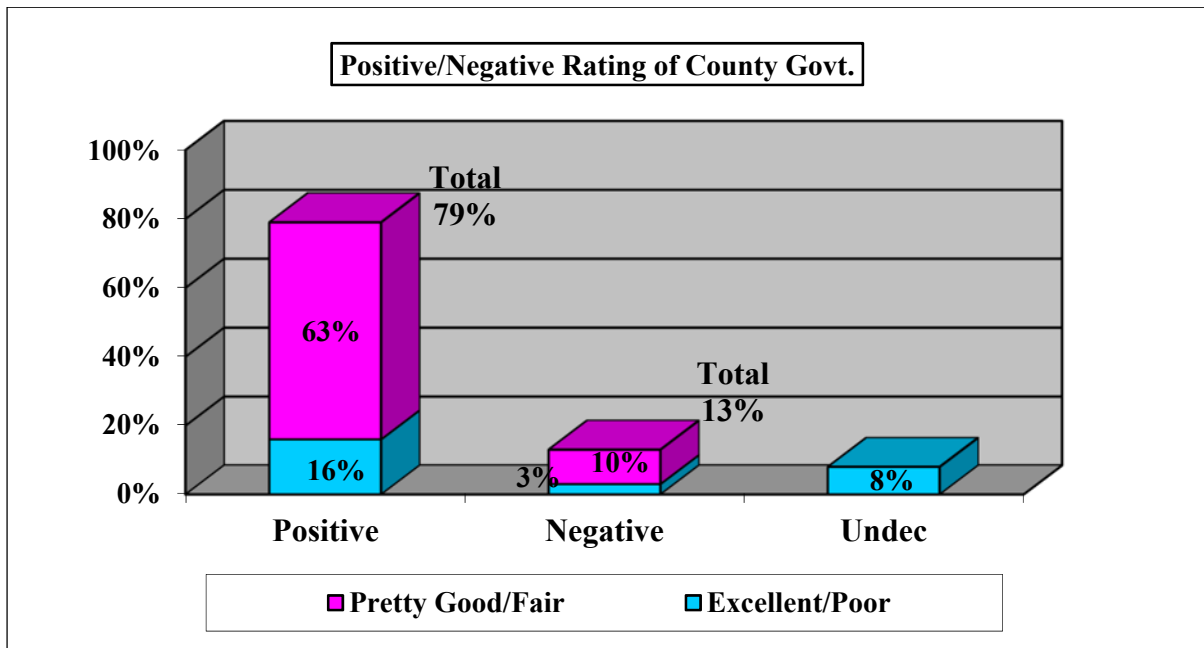
**-- Reasons for the rating - (Qs. 15-16)**

As a follow up to the Positive/Negative rating question, respondents were asked to give their reason for issuing the rating that they did. The combined, “None-No problems” (11 percent); and, “Good overall” (9 percent); formed a noticeably lower proportion of the responses than in prior survey years but this drop was not made-up in an increase in, “Undecided”, which came in at 16 percent. Rather, there were more specific reasons – each with slightly elevated proportions than in previous years – being cited and recorded in the 2018 survey.

As for the responses of those who issued a negative rating, it is important to remember that at 15 percent “Total Negative”, the responses for the reasons for that rating came from a total of just 59 individuals. For many of them, “Communication” (15 percent); “Economic development/Jobs” (13 percent); and, “Public transit” (6 percent) were the reasons which placed those three reasons in the top three spots of the 20-plus separate categories of responses.

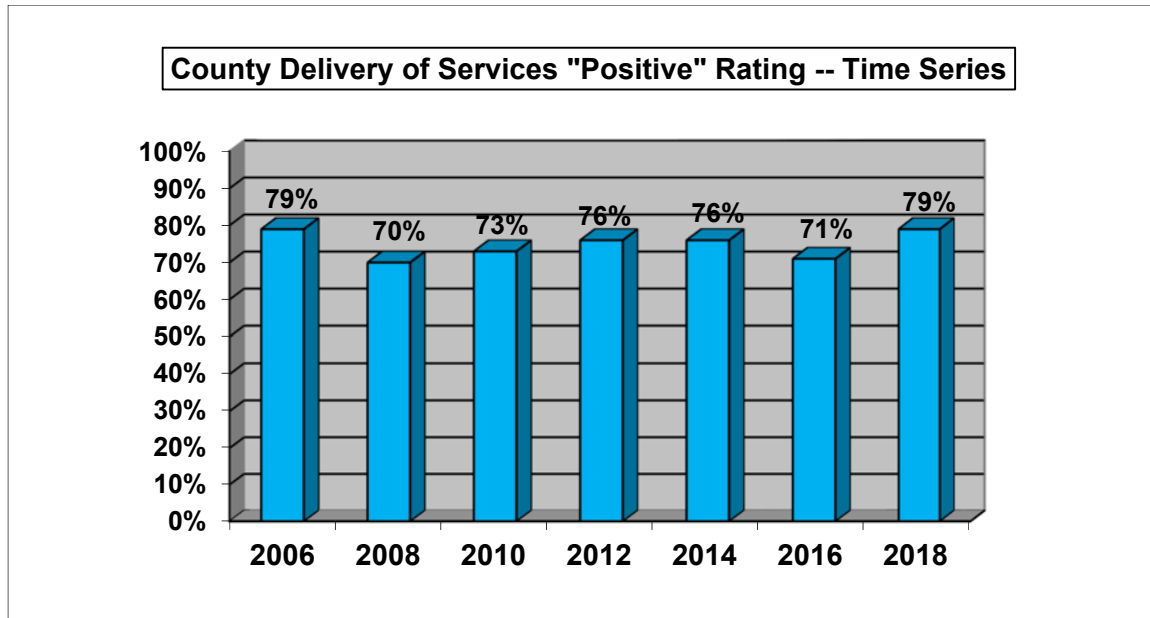
**-- Rate your County Government - (Q. 17)**

At 79 percent “Total Positive”, the 2018 rebounds eight points from the 2016 measurement, matching its highest recorded total posted in 2006. Actually, the 2018 total positive is the highest it’s ever been because the “*excellent*” portion of that rating is five points higher than that reported 12 years ago. The graph below illustrates the results for 2018:



*Subgroups reporting “negative” in proportions greater than the norm of 13% included:  
(Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)*

- 39% *Rate local govt. – Negative*
- 39% *Financial management – Negative*
- 28% *Local direction – Wrong track*
- 24% *Ottawa comparison – About the same*
- 22% *County direction – Wrong track*
- 26% *Vote in local elections*
- 20% *Taxes – Too high*
- 21% *Express bus – Weekly/Monthly*
- 19% *Region 4 residents*
- 19% *State direction – Wrong track*
- 18% *Vote in local elections – Half the time*



**-- Reasons for the County Rating - (Qs. 18-19)**

Again, as a follow up to the Positive/Negative rating of how well the county is doing in providing basic services, respondents were asked to give their reason for issuing the rating that they did. The reader is also reminded again that at 13 percent total “Negative” rating, the responses for the reasons for that rating came from a total of 50 individuals. The following illustrates the top several reasons why respondents offered the respective ratings:

*Reasons for “Positive” rating for county government delivery of services*

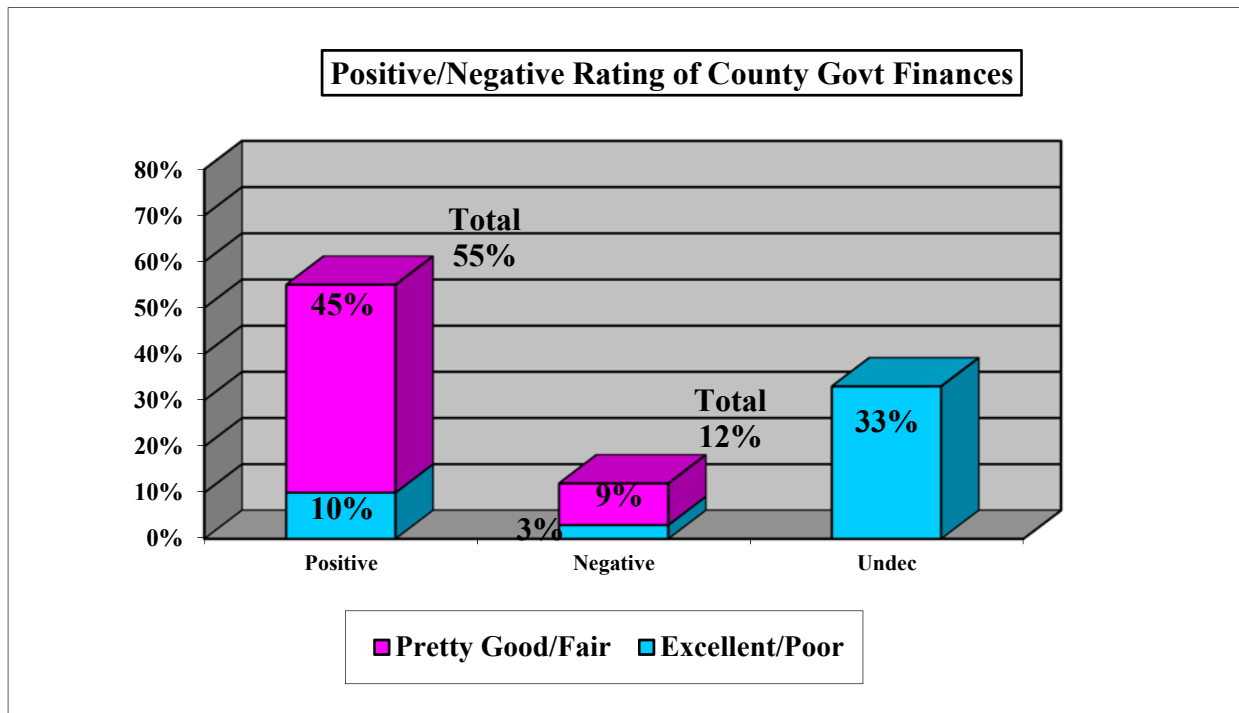
- 15% - No complaints/problems
- 7% - Good job overall
- 6% - Service quality
  - Police/Low crime*
  - Road maintenance*
  - Communication*

*2018 Reasons for “Negative” rating for county government delivery of services*

- 17% - Poor roads
- 10% - Lack of economic development/Jobs
- 7% - Communication
  - Health & Human Services*

**-- Rate the County’s Handling of Finances - (Q. 20)**

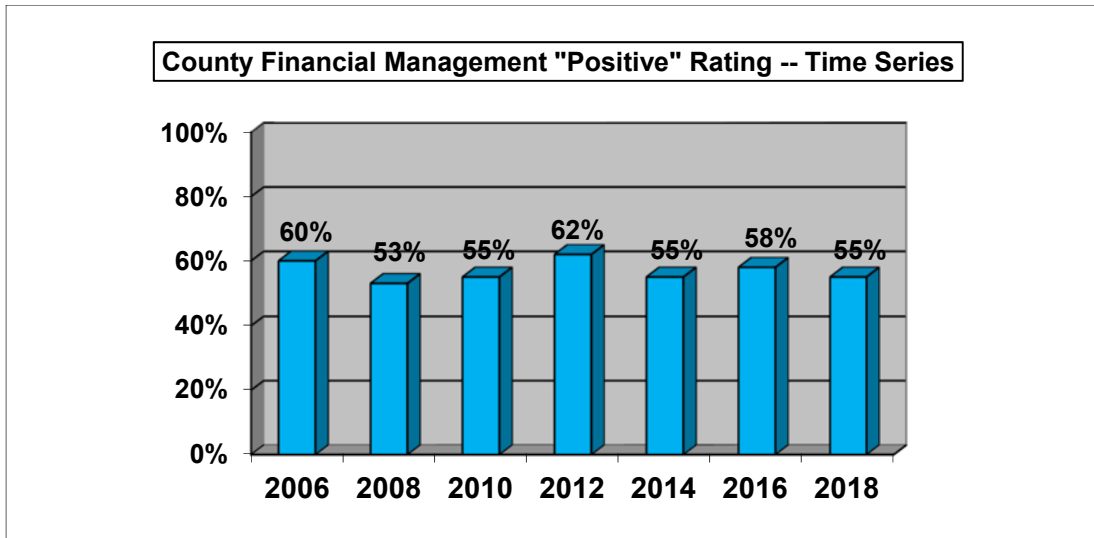
In an effort to probe a little more specifically about perceptions concerning county government, respondents were also asked to offer a “Positive” or “Negative” rating for the job Ottawa County does in managing county finances. Over the course of the seven survey years, the “Positive” rating has ranged from a low of 53 percent (2008) to a high of 62 percent (2012) and the “Negative” rating has ranged from 20 percent (2010) to the 12 percent level recorded in the current study. As can be seen from the graph below, the 2018 “Positive” results fall in the middle of the historical range.



*Subgroups reporting “negative” in proportions greater than the norm of 12% included:  
(Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)*

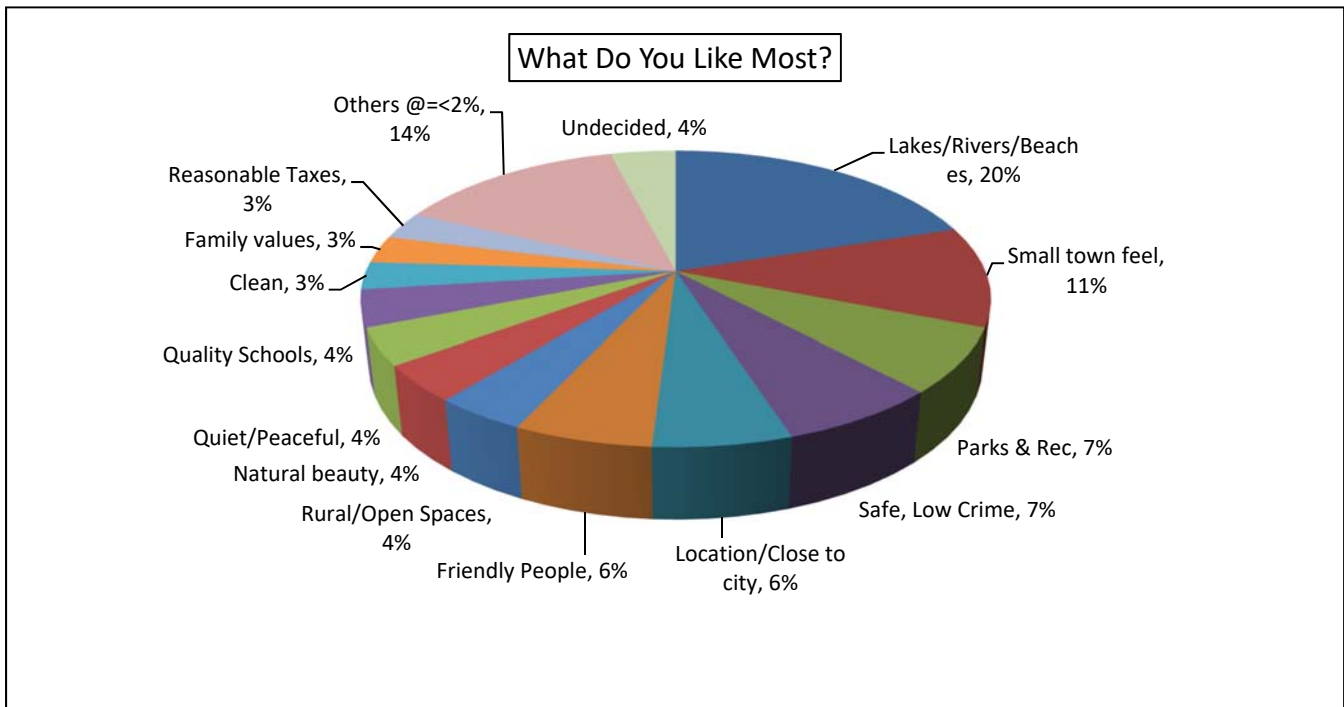
- 38% *County services – Negative*
- 32% *Local services – Negative*
- 28% *Local direction – Wrong track*
- 23% *Taxes – Too high*
- 19% *Info source preference – Social media*
- 16% *Region 3 residents*
- County direction – Undecided
- Top Issue (prompted) – Schools
- Express bus – Weekly/Monthly
- Info source preference – email
- Men 18-49





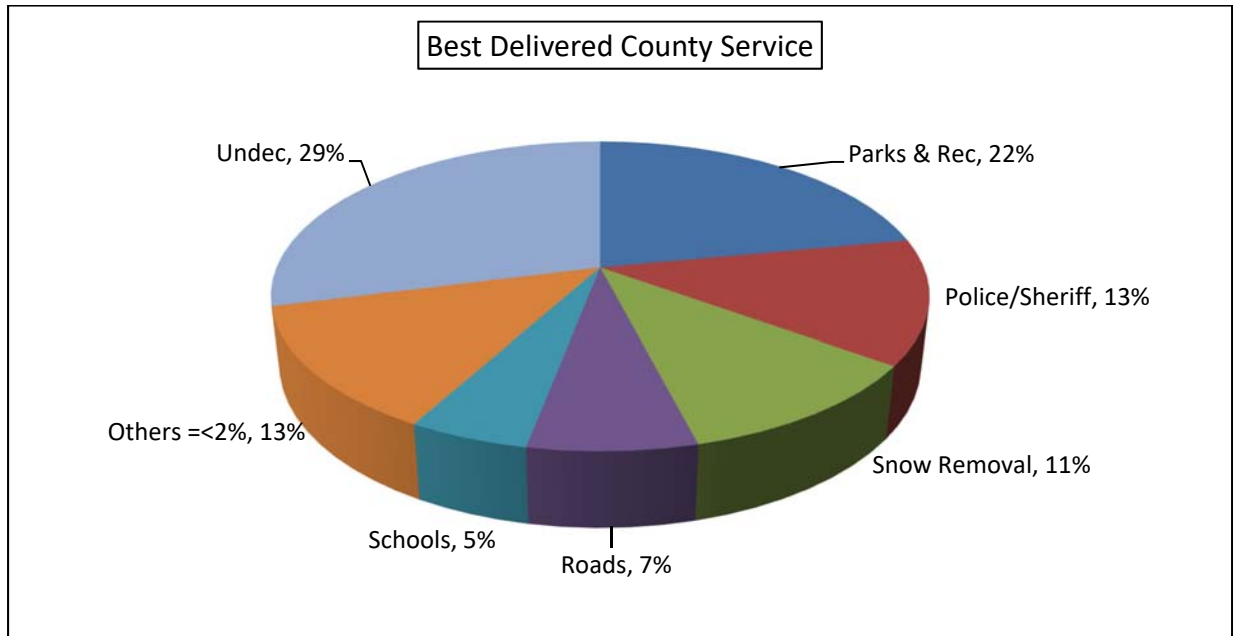
**-- What is liked the most about living in Ottawa County - (Q. 21)**

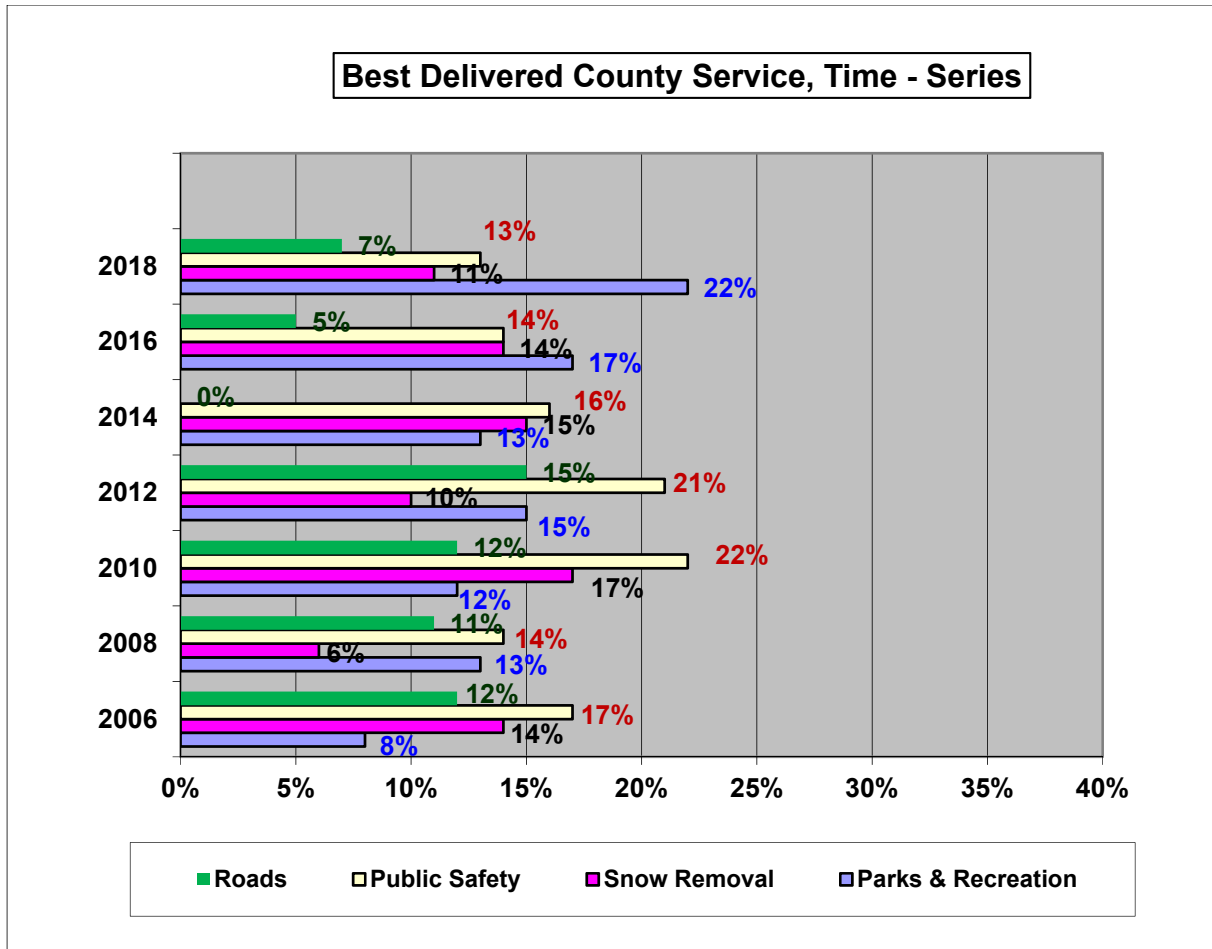
Since 2006, the predominant answer to this open-ended question has centered on the county’s proximity to Lake Michigan, access to urban centers and, its natural beauty. Coming in close behind are comments about personal security (e.g. “safe”, “friendly”) and other quality of life attributes. Also striking over the years is the consistently small percentage filling the “Undecided” slot. The following pie-chart illustrates the distribution of responses for 2018.



**-- Ottawa County does the best job at providing . . . ? - (Q. 22)**

“Parks and Recreation”, “Law enforcement”, and “Snow removal”, have traditionally occupied the top spots for the services named by respondents as being the best delivered by the County and the 2018 survey continues that tradition. Those three service areas account for nearly half (46 percent) of the responses. Also, as with past surveys, the precise functions and responsibilities of county government are sometimes not well defined in the minds of some respondents, so there is usually some attribution given to county government (both good and bad) that is more properly assigned elsewhere. Be that as it may, the chart below shows the major categories mentioned for this question.



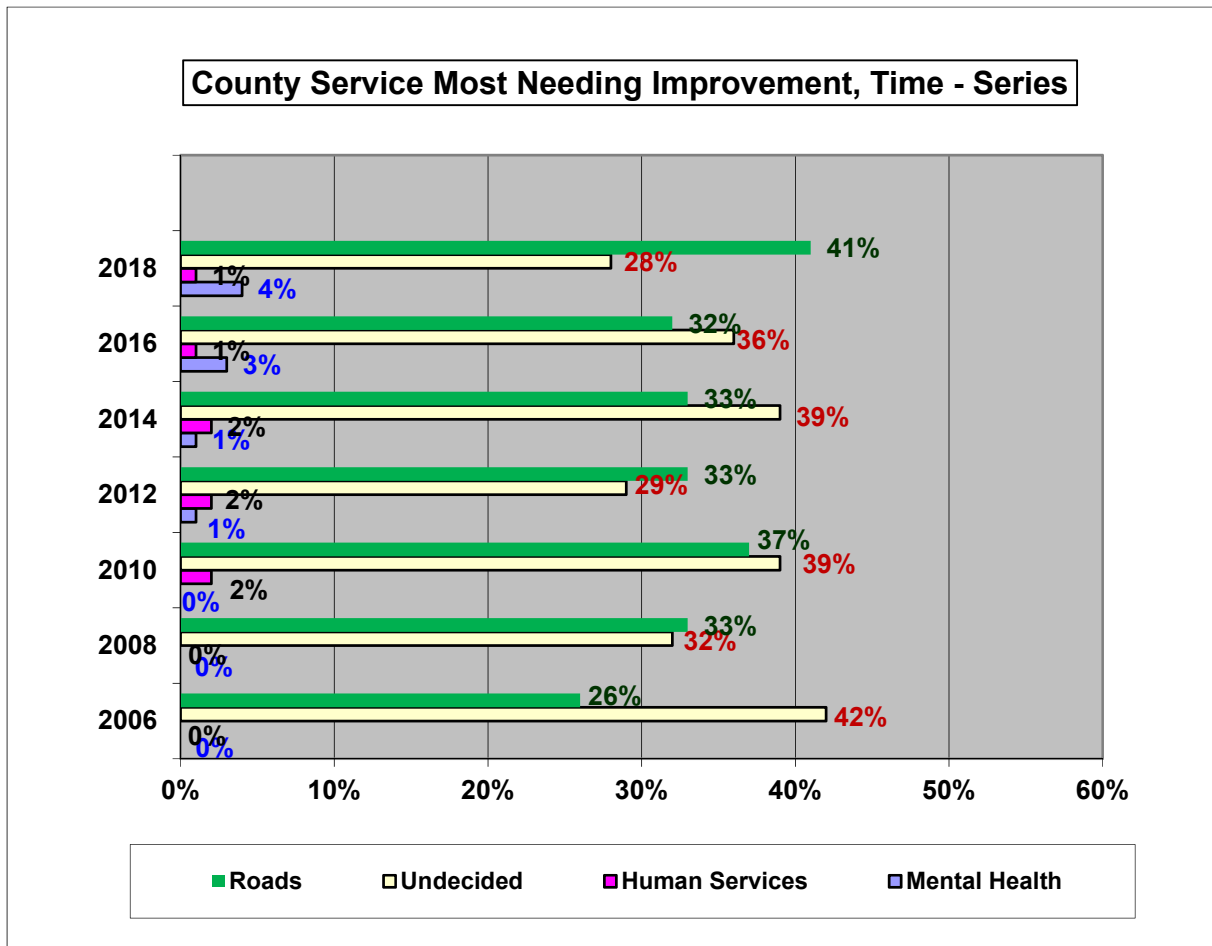


**-- What County Service Needs the Most Improvement? - (Q. 23)**

Despite legislative action to address transportation infrastructure needs, “Roads” is the most-mentioned top-of-mind response when respondents are asked to name what specific county service needs the most improvement. Forty-one percent of respondents answered “roads” in 2018, nine points higher than that recorded in 2016. Perhaps just as noteworthy is the reduction of seven point in the proportion of respondents who were “Undecided” (from 36 percent to 29 percent) about which of the myriad of county services is in most need of improvement. Indeed, 2018 records the first time the undecided category has not surpassed or closely approximated the proportion naming roads in all seven prior tests.

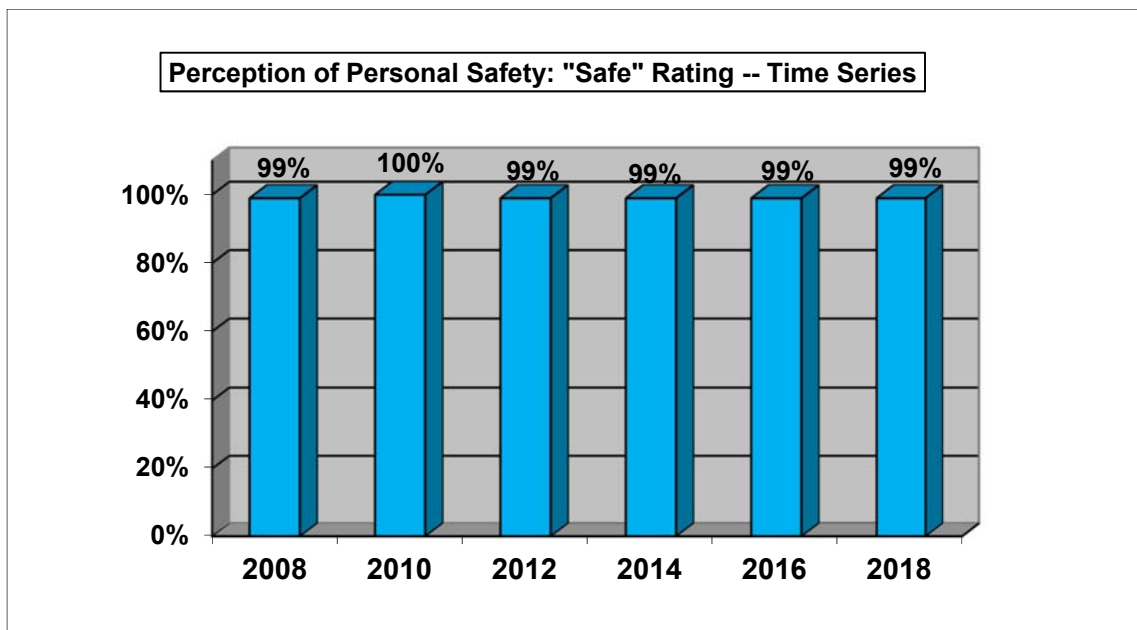
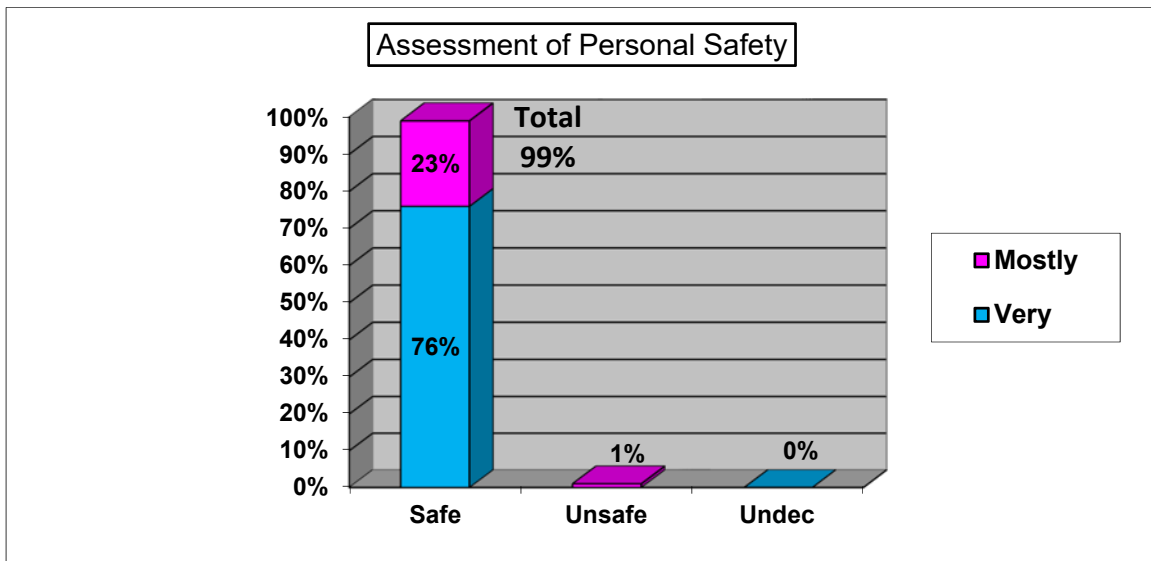
Subgroups reporting “Roads” in proportions greater than the norm of 41% included:  
 (Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)

- 54% Age 18-34
- 53% Vote in local elections – Seldom/Never
- Over \$100K hh income
- 50% Preferred info source – Email
- 49% Region 3 residents
- City/Twp. direction – Wrong track
- Years of residence – 1-15**
- \$50K - \$75K hh income
- 48% County financial mgt. – Negative**
- 47% Michigan direction – Undecided
- Ottawa comparison – About the same
- 46% Preferred info source – Social media
- Children at home**
- Men 18-49



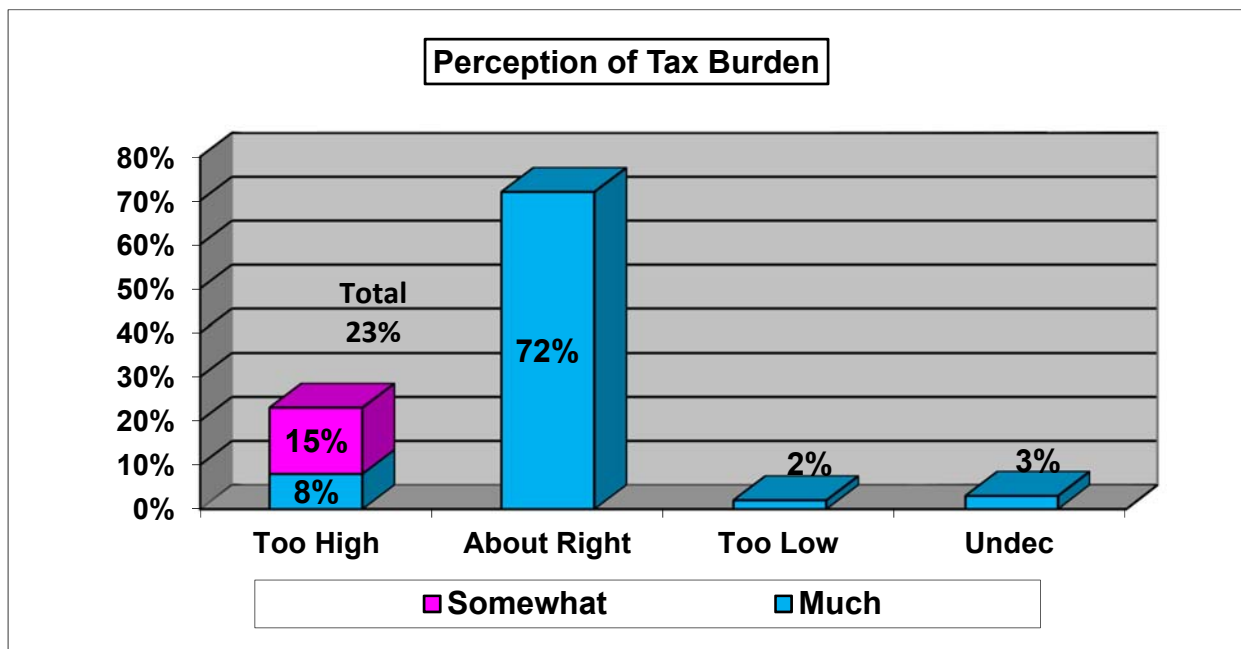
**-- Perception of Personal Safety - (Q. 24)**

First introduced in the 2008 survey and repeated in each of the subsequent polls, respondents were asked, “How safe do you feel in your neighborhood?” Mirroring results from the prior five studies, virtually all 2018 respondents reported that they felt safe where they lived. It is noted that a top-of-mind response of, “safe”, “safety” and “friendly people” are all mentioned specifically in response to Q 21 which asks respondents to identify what it is they most like about living in Ottawa County. The chart below illustrates the 2018 results:



**-- Perception of tax burden - (Q. 25)**

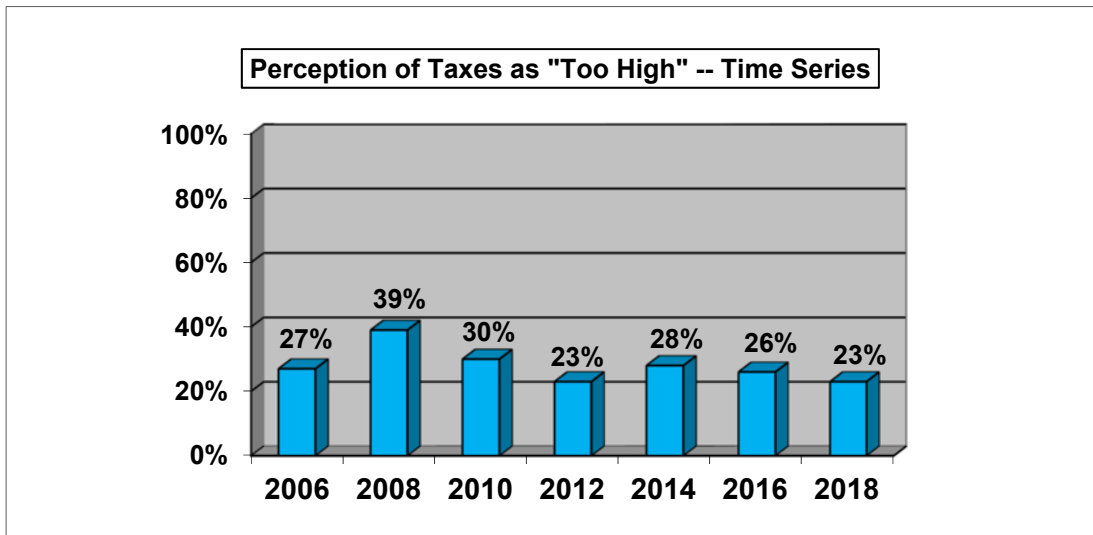
Respondents’ perception of value received in exchange for taxes paid is not only a key indicator about attitudes toward a governmental entity generally, but it is also a fairly good harbinger of the chances for passing a ballot proposal regarding changes to the tax assessment status quo. In a question included in nearly all surveys of this type conducted by EPIC • MRA, respondents are asked if county property taxes and other fees were “*Too high*”, “*Too low*”, or “*About right*”, given the amount and quality of county government services they receive in return. If respondents said “*Too high*”, a follow-up question asked if taxes are “*Much*” or “*Somewhat*” too high. The results were as follows:



At 23 percent, the total “too high” figure for 2018 joins the 2012 measurement as being the lowest level recorded over the course of this survey being conducted.

Subgroups reporting “Too high” in proportions greater than the norm of 28% included:  
 (Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)

- 46% **Local rating – Negative**
- 44% **Top issue concern – Taxes**
- County financial mgt. – Negative**
- 41% **Local direction – Wrong track**
- 39% **County direction – Wrong track**
- 37% **County rating – Negative**
- 34% **Region 5 residents**
- H.S. or less**
- 32% **Age 50-64**
- 30% **Vote in local elections – Half the time**
- State direction – Wrong track**
- County activities – Unaware**
- 29% **Age 50+**
- 28% **Post H.S.**



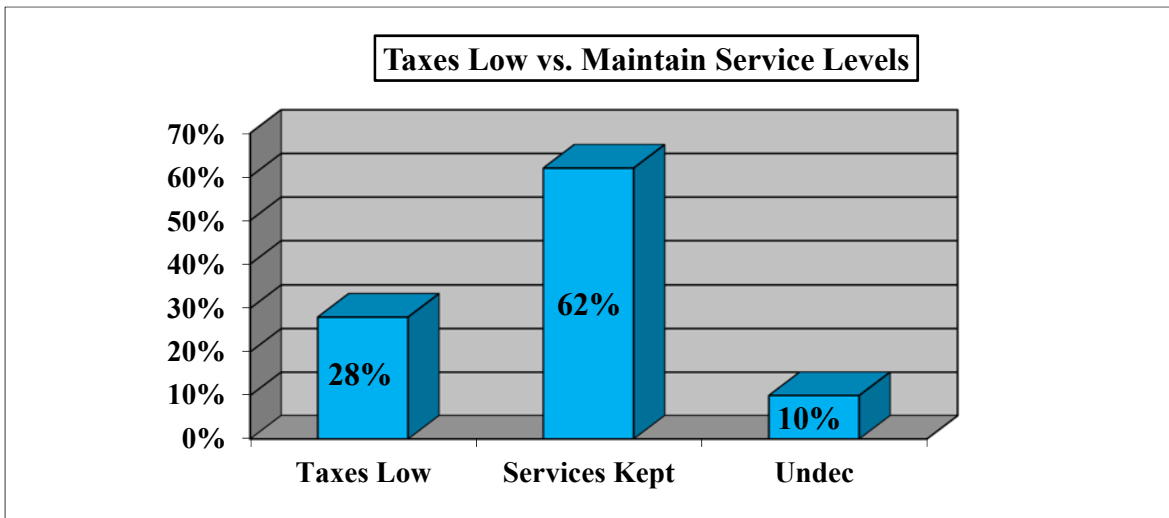
**-- Taxes vs. Service Levels - (Q. 26)**

Another question designed to provide insight to elected officials and other policymakers asks respondents to select between the options of maintaining the current level of services even if that means a tax increase or, keep taxes low, even if that means a cut in services. This question has been posed in every survey since 2006 when a bare plurality of respondents opted of the “maintain services” statement. In 2008 and 2010, clear-to-strong majorities opted for the, “keep taxes low” statement. The survey of 2012 was the first time a majority of respondents selected the “maintain services” option over the “keep taxes low” alternative, with a two-point increase in this majority (to 53 percent) being recorded in 2014.

In 2016, the majority response opting for the “maintain services” statement was unequivocal, with 61 percent of respondents reporting a preference to, maintain services even if it means a tax increase. The 2018 results see this sentiment nudge up one percentage point to 62 percent, with a concomitant slight two-point reduction in the proportion of respondents opting for the, “keep taxes low”, statement.

The language of the options available to respondents (the presentation of which were rotated throughout the sample to eliminate potential bias) as a reaction they would prefer county government to take in the event of a budget shortfall reads:

- “Keep taxes and fees as low as possible – even if this means a cut in services”; or,
- “Maintain existing services – even if this means a tax increase.”



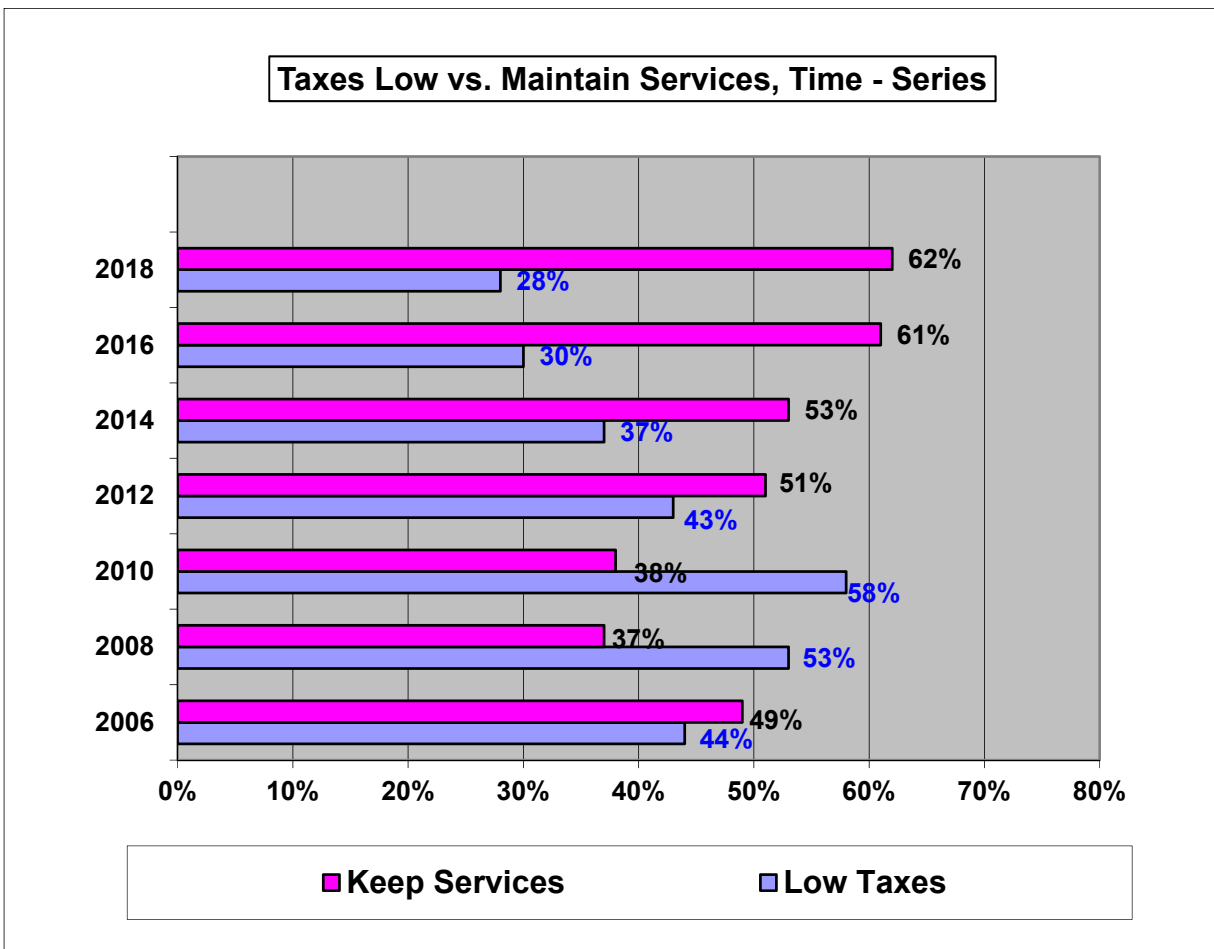
*Subgroups selecting “Keep taxes low” in proportions greater than the norm of 28% included: (Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)*

- 69% *Top issue – Taxes*
- 56% *Taxes – Too high*
- 46% *No college men*
- 41% *H.S. or less*
- Men 18-49**
- 37% *Region 5 residents*
- Age 65+*
- 36% *County financial mgt. – Negative*
- 35% *State direction – Undecided*
- Social Media use – Seldom/Never*
- Age 50+*
- Men**
- 34% *Ottawa comparison – About the same*
- County activities – Unaware*
- Info source – TV News*
- 33% *County direction – Undecided*
- \$25K - \$50K hh income*



Subgroups selecting “Maintain services” in proportions greater than the norm of 62% included:  
 (Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)

- 77% *Over \$100K hh income*
- 75% *Info source preference – Social Media*
- 76% **Women 18-49**  
**College women**
- 74% **State direction – Wrong track**
- 73% *Express Ride – Weekly/Monthly*  
**Co. website visitation – A lot/Some**
- 72% **Top issue – Schools**  
**Taxes – About right**
- 70% *Info source preference – Email*  
*Years of residence – 1-15*
- 69% **Use social media – Daily**  
**College education**
- 68% *Age 18-49*  
*Women*
- 67% *\$25K - \$50K hh income*

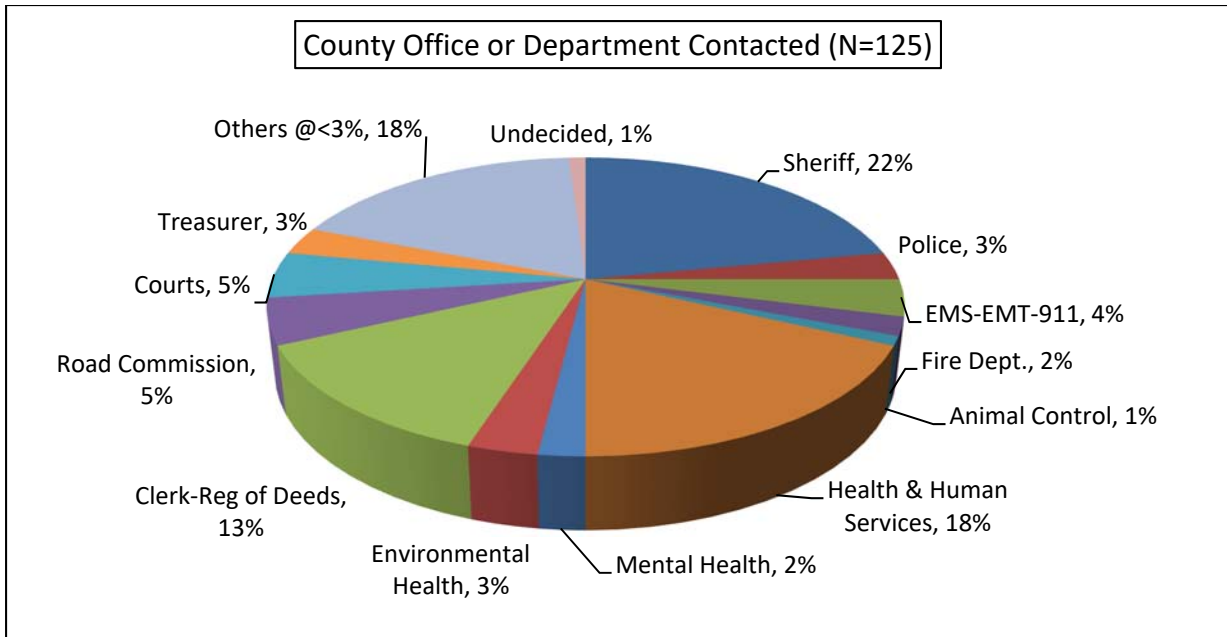


**-- Contact with a County Department - (Qs. 27-29)**

Another original question from 2006 asks respondents if they or anyone else in their household has contacted a county office or department, “. . . *in the past year*”. The first year this question was asked saw the highest proportion of responses at thirty-seven percent. In subsequent tests, the response rate had remained consistently at or around thirty-percent. The measurement in 2016 of 26 percent revealed a notable decline in the proportion of residents reporting they or a member of their household had recently contacted an Ottawa County office or department, but the 2018 measurement of 31 percent suggests the measurement two years ago is likely an aberration. That is, the 2018 measurement of citizen contact with a county office shows a rebound to levels recorded in most of the prior test years. The following chart illustrates the results over time:

2006	2008	2010	2012	2014	2016	<b>2018</b>	
28%	21%	20%	23%	26%	19%	19%	Yes, respondent
7%	8%	3%	4%	2%	3%	6%	Yes, someone else
2%	3%	7%	2%	3%	4%	6%	Yes, more than one
<b>37%</b>	<b>32%</b>	<b>30%</b>	<b>29%</b>	<b>31%</b>	<b>26%</b>	<b>31%</b>	<b>TOTAL CONTACTED</b>
61%	63%	69%	71%	68%	73%	68%	No one contacted an office or department of Ottawa County
6%	5%	1%	---	1%	1%	1%	Undecided/Refused

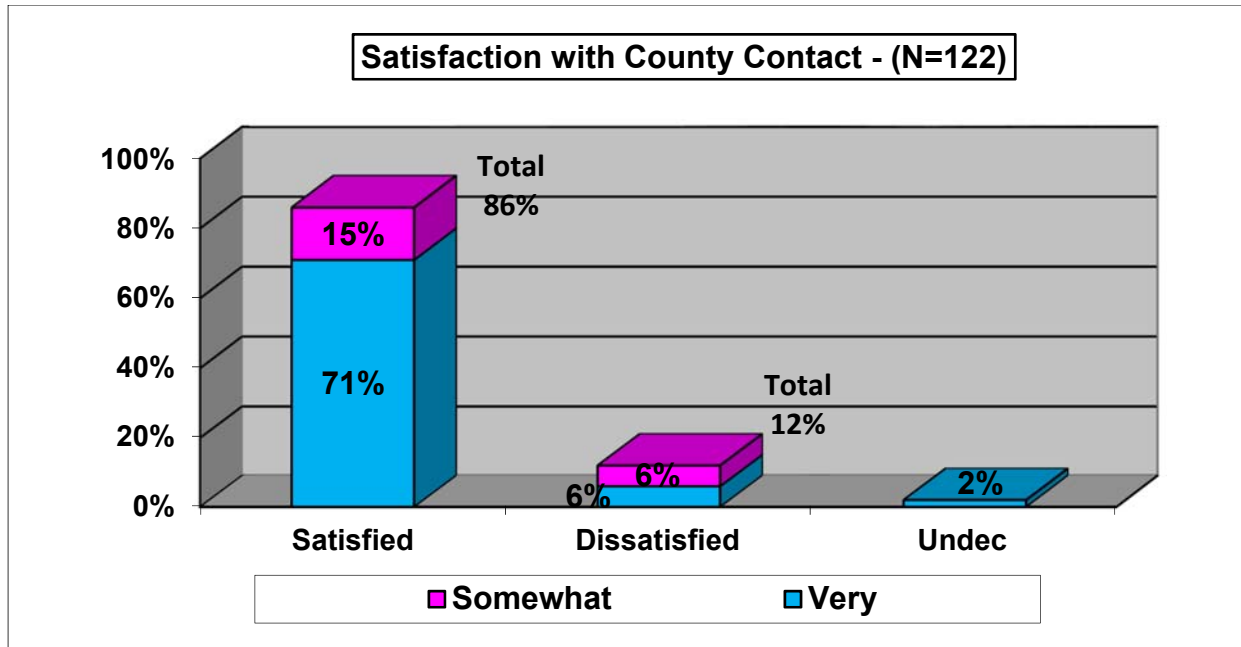
Typical of the results from 2008 through the current survey year, the department receiving the most reported contacts has been the Sheriff’s Department if combined with other replies involving law enforcement or emergency responders.



Two thirds of respondents who reported contacting a county office (66 percent) said they did so over the telephone, with another 28 percent reporting a personal visit. Website contact was reported by only two percent, as was writing correspondence, with another two percent uncertain about the mode used.

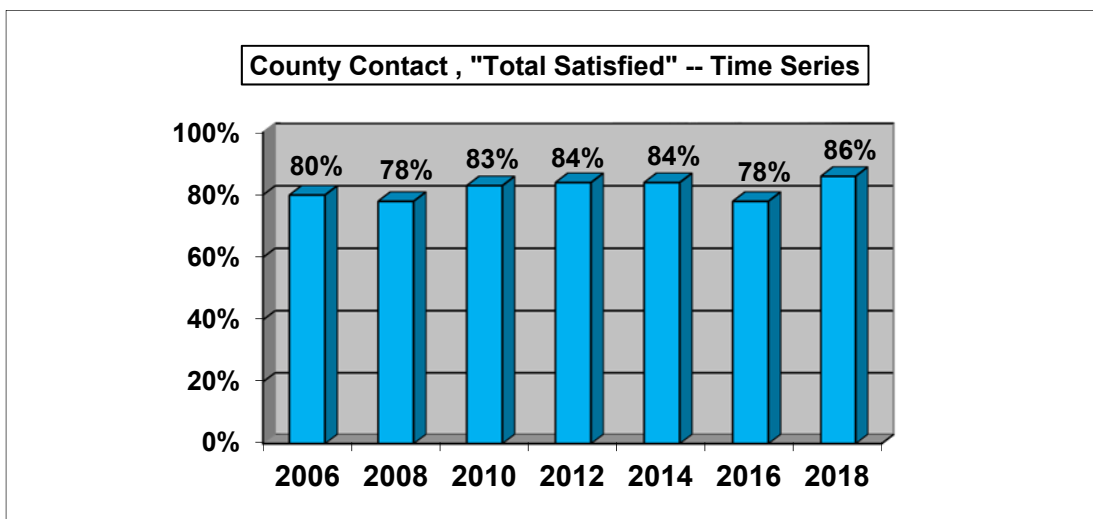
**-- Satisfaction with Job Performance - (Q. 30)**

Just as 2016 saw a slight reduction in the total number of respondents reporting contact with a county agency, so too, was their reported overall satisfaction with the experience. Again, that measurement is likely aberrant as the 2018 measurement of citizen satisfaction pops to 86 percent, with 71 percent of the “Very” satisfied variety. It is also worth noting that the “Total Dissatisfied”, is the lowest recorded level. The chart below illustrates the findings for 2018.



Sufficiently sizeable Subgroups reporting “Dissatisfied” in proportions greater than the norm of 12% included:

- 31% Taxes – Too high
- 23% Use social media – Seldom/Never
- 22% County activities – Unaware
- Age 50+
- 18% No college women
- 17% Top issue (prompted) – Roads
- Preferred info source – Mail
- 16% Children at home – No
- 15% Vote in local elections – Most of the time



### -- More, Enough, or Too Much? - (Qs. 31-41)

A battery of questions many policy-making bodies have found to be helpful recites a list of county services and activities. Respondents are asked after hearing of each individual service or activity to give their opinion as to whether the county is currently doing – “*Enough*”, “*Too Much*”, or if “*More*” needs to be done. To measure the intensity of opinion that more needs to be done, respondents answering “*More*” are asked if they believe that “*Much More*” or “*Somewhat More*” is necessary to address their concern.

In 2016, “*Providing mental health services*” took over the top, “*Total More*” spot on the roster, receiving a 40 percent “*Total More*” score, over half of which (22 percent) was “*Much more*”. This trend toward greater concern about mental health services was first detected in 2014 and continues in the 2018 survey. In this most recent study, provision of mental health services posted a 43 percent “*Total More*” measurement, 24 percent of that total being “*Much*” more. Perhaps most striking about the current measurement is the intensity of expression by respondents. That is, the 24 percent “*Much*” more proportion is the highest recorded for any service area in the ten years of conducting this survey – besting the 2016 measurement by two percentage points – with its closest rival being 19 percent “*Much*” more recorded in 2010 for county economic development efforts.

Equally dramatic as the movement of the mental health services area is the concern expressed for “*Providing substance abuse prevention and treatment services*”, first detected in the 2012 results. In the 2012 and 2014 studies, substance abuse services had leveled off at a number six ranking from its former eleventh place spot in 2008. In the 2016 survey, substance abuse services rose to third place on the “*Total More*” scale, with just under one-quarter of respondents (24 percent) of the opinion that the county could do more in this area. For 2018, this service area maintains its number three ranking but the “*Total More*” jumps seven points to 31 percent and the “*Much*” more level doubling to 14 percent.

New for 2018 was the statement “*Promoting Ottawa County as a welcoming place for diverse populations*”. This newly introduced county activity statement placed fifth of eleven in the rankings, posting a 24 percent “*Total More*” frequency of responses, with 10 percent being, “*Much*” more.

Presented below is a comparison of the findings over the seven surveys conducted to date:

	<b>2018 SORTED MOST TO LEAST TOTAL “MORE NEEDED”</b>	<b><u>Much More</u></b>	<b><u>TOTAL More</u></b>	<b><u>Enough</u></b>	<b><u>Too Much</u></b>	<b><u>Undec/ DK</u></b>
<u>36.</u> #1	Providing mental health services	24%	<b>43%</b>	26%	2%	29%
	Ranking in 2016 - 1	22%	<b>40%</b>	38%	2%	20%
	Ranking in 2014 - 2	10%	<b>23%</b>	37%	3%	37%
	Ranking in 2012 - 5	7%	<b>20%</b>	50%	---	30%
	Ranking in 2010 - 8	7%	<b>22%</b>	50%	2%	26%
	Ranking in 2008 - 12	6%	<b>21%</b>	49%	2%	28%
	Ranking in 2006 - 8	7%	<b>21%</b>	41%	1%	37%
<u>40.</u> #2	Keeping county residents informed about county programs and services	16%	<b>37%</b>	56%	1%	4%
	Ranking in 2016 - 2	11%	<b>39%</b>	56%	1%	4%
	Ranking in 2014 - 1	10%	<b>40%</b>	54%	1%	5%
	Ranking in 2012 - 2	14%	<b>27%</b>	55%	2%	3%
	Ranking in 2010 - 2	12%	<b>41%</b>	54%	1%	4%
	Ranking in 2008 - 1	15%	<b>42%</b>	49%	---	9%
	Ranking in 2006 - 4	16%	<b>42%</b>	52%	---	6%
<u>35.</u> #3	Providing substance abuse prevention and treatment services	14%	<b>31%</b>	27%	2%	40%
	Ranking in 2016 - 3	7%	<b>24%</b>	44%	1%	31%
	Ranking in 2014 - 6	4%	<b>18%</b>	37%	4%	41%
	Ranking in 2012 - 6	5%	<b>19%</b>	49%	2%	30%
	Ranking in 2010 - 9	5%	<b>19%</b>	46%	5%	30%
	Ranking in 2008 - 11	6%	<b>22%</b>	46%	4%	28%
	[Not posed in 2006]					
<u>39.</u> #4	Working with local governments to best plan commercial and residential development so excessive growth and sprawl can be avoided	12%	<b>27%</b>	51%	3%	19%
	Ranking in 2016 - 6	4%	<b>20%</b>	55%	2%	23%
	Ranking in 2014 - 5	4%	<b>20%</b>	55%	2%	23%
	Ranking in 2012 - 4	10%	<b>26%</b>	54%	3%	17%
	Ranking in 2010 - 5	5%	<b>29%</b>	49%	5%	17%
	Ranking in 2008 - 3	9%	<b>32%</b>	47%	3%	18%
	Ranking in 2006 - 3	18%	<b>42%</b>	39%	2%	16%

	<b>2018 SORTED MOST TO LEAST TOTAL “MORE NEEDED” (cont.)</b>	<b><u>Much More</u></b>	<b><u>TOTAL More</u></b>	<b><u>Enough</u></b>	<b><u>Too Much</u></b>	<b><u>Undec/ DK</u></b>
42. #5	Promoting Ottawa County as a welcoming place for diverse populations	10%	<b>24%</b>	64%	4%	8%
New Question for 2018						

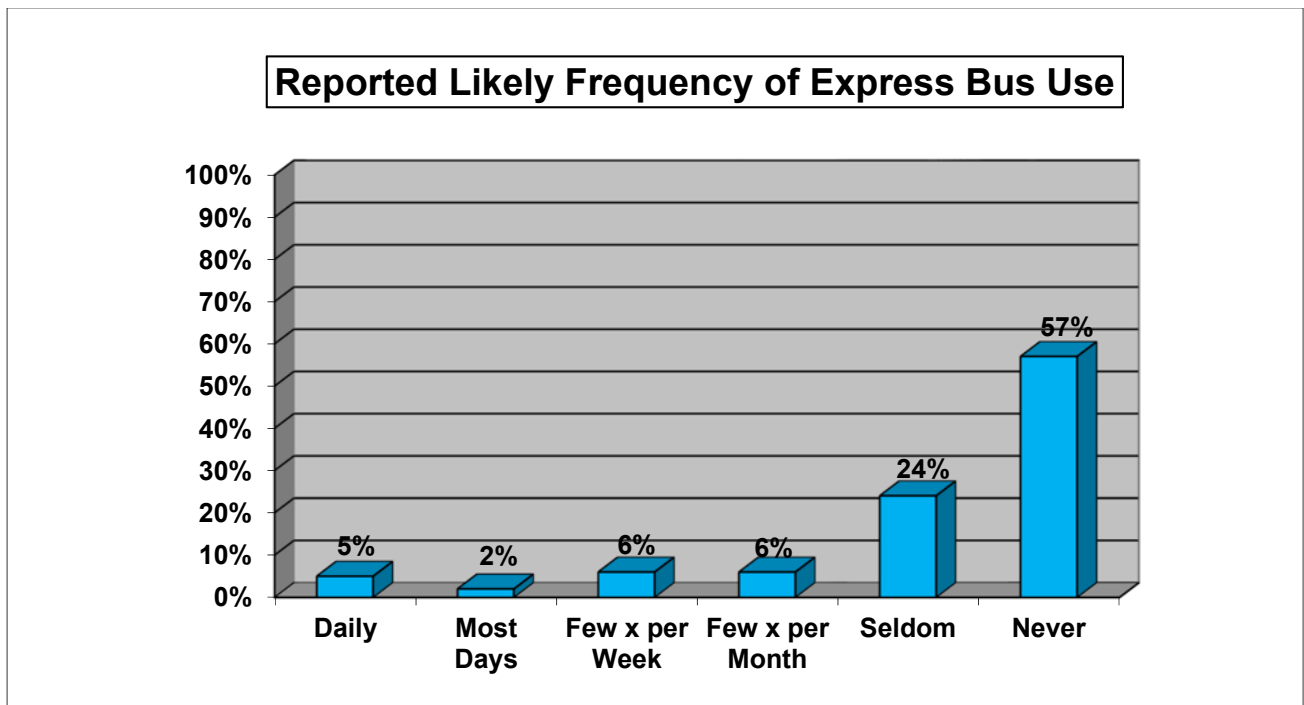
37. #6	Providing programs for juvenile offenders separate from adult prison programs	9%	<b>22%</b>	28%	2%	48%
	Ranking in 2016 - 4	6%	<b>24%</b>	39%	2%	35%
	Ranking in 2014 - 3	5%	<b>21%</b>	31%	1%	47%
	Ranking in 2012 - 8	5%	<b>17%</b>	47%	1%	35%
	Ranking in 2010 - 7	5%	<b>23%</b>	41%	1%	35%
	Ranking in 2008 - 10	6%	<b>22%</b>	45%	2%	31%
	Ranking in 2006 - 7	8%	<b>22%</b>	37%	1%	40%
34. #7	Providing effective economic development programs	4%	<b>18%</b>	52%	4%	26%
	Ranking in 2016 - 7	3%	<b>17%</b>	56%	4%	23%
	Ranking in 2014 - 4	3%	<b>21%</b>	48%	3%	28%
	Ranking in 2012 - 1	14%	<b>41%</b>	46%	2%	11%
	Ranking in 2010 - 1	19%	<b>50%</b>	35%	3%	12%
	Ranking in 2008 - 2	14%	<b>42%</b>	35%	2%	21%
	Ranking in 2006 - 2	18%	<b>51%</b>	31%	2%	16%
31. #8	Providing effective law enforcement services by the Sheriff's Department	4%	<b>13%</b>	82%	2%	3%
	Ranking in 2016 - 8	1%	<b>10%</b>	85%	3%	2%
	Ranking in 2014 - 8	1%	<b>12%</b>	82%	4%	2%
	Ranking in 2012 - 10	3%	<b>13%</b>	83%	2%	2%
	Ranking in 2010 - 11	3%	<b>14%</b>	80%	3%	3%
	Ranking in 2008 - 6	8%	<b>25%</b>	66%	2%	7%

	<b>2018 SORTED MOST TO LEAST TOTAL “MORE NEEDED” (cont.)</b>	<u>Much More</u>	<u>TOTAL More</u>	<u>Enough</u>	<u>Too Much</u>	<u>Undec/ DK</u>
<u>33.</u> #9	Providing public health services, such as immunizations and restaurant inspections	3%	<b>12%</b>	70%	2%	16%
	Ranking in 2016 - 5	4%	<b>18%</b>	69%	2%	11%
	Ranking in 2014 - 7	3%	<b>13%</b>	70%	3%	14%
	Ranking in 2012 - 9	4%	<b>13%</b>	74%	1%	12%
	Ranking in 2010 - 10	4%	<b>16%</b>	67%	6%	11%
	Ranking in 2008 - 14	6%	<b>16%</b>	65%	2%	17%
	Ranking in 2006 - 13	4%	<b>15%</b>	70%	1%	14%
<u>37.</u> #10	Providing a quick emergency response to accidents	3%	<b>7%</b>	87%	0%	6%
	Ranking in 2016 - 9	1%	<b>7%</b>	85%	1%	7%
	Ranking in 2014 - 11	0%	<b>5%</b>	88%	---	7%
	Ranking in 2012 - 12	2%	<b>9%</b>	85%	1%	5%
	Ranking in 2010 - 14	2%	<b>9%</b>	85%	---	6%
	Ranking in 2008 - 9	7%	<b>22%</b>	64%	1%	13%
	Ranking in 2006 - 15	3%	<b>11%</b>	80%	---	9%
<u>41.</u> #11	Maintaining <u>County</u> parks and recreational facilities	2%	<b>7%</b>	87%	3%	3%
	Ranking in 2016 – 10 (tie)	1%	<b>5%</b>	91%	2%	2%
	Ranking in 2014 - 9	1%	<b>8%</b>	87%	4%	1%
	Ranking in 2012 - 14	1%	<b>5%</b>	90%	4%	1%
	Ranking in 2010 - 13	2%	<b>11%</b>	83%	5%	1%
	Ranking in 2008 - 13	4%	<b>18%</b>	72%	4%	6%
	Ranking in 2006 - 10	4%	<b>18%</b>	76%	2%	4%
<u>32.</u> #12	Safely operating the county jail, protecting the public, and avoiding prison overcrowding	3%	<b>6%</b>	59%	2%	33%
	Ranking in 2016 – 10 (tie)	1%	<b>5%</b>	69%	2%	24%
	Ranking in 2014 - 10	1%	<b>7%</b>	63%	3%	27%
	Ranking in 2012 - 13	3%	<b>7%</b>	70%	1%	22%
	Ranking in 2010 - 15	1%	<b>9%</b>	67%	3%	21%
	Ranking in 2008 - 15	4%	<b>16%</b>	61%	2%	21%
	Ranking in 2006 - 14	4%	<b>12%</b>	65%	2%	12%



**-- Likelihood of Express Bus ridership - (Qs. 43-44)**

Respondents were informed that local leaders have been discussing the possible establishment of express bus routes providing a link between major population centers in Ottawa and Kent counties. After this description, they were asked to report on the frequency with which they would likely use this bus service should it be implemented. Well over half the respondents (57 percent) reported they would “Never” use such a service. Of the remaining 43 percent respondents who reported a likelihood of at least “Seldom” using the service, the vast majority (72 percent), indicated their use would be between the hours of 7:00 AM and 5:00 PM, with another 20 percent reporting their use of the service would mostly occur between the hours of 5:00 PM and 11:00 PM.



*Subgroups reporting at least “Few times a month” in proportions greater than the norm of 19% included:*

- 40% Under \$25K hh income
- 35% Financial management – Negative
- Info source preference – Social media
- 34% Renters
- 33% County direction – Wrong track
- 31% County rating – Negative
- County contact – Yes
- 30% State direction – Wrong track
- Age 18-34
- 29% Local rating – Negative
- Women 18-49
- 26% Local direction – Wrong track
- Residence in Ottawa -- Lifetime

- 25% *Vote in local elections – Seldom/Never*  
*Use of social media – Daily*  
*Age 18-49*
- 24% *Residence in Ottawa – 1-15 yrs.*  
*Post H.S.*
- 23% *Vote history – One of last two*  
*Top issue (prompted) – Schools*  
*Website visitation – A lot/Some*  
*\$25K - \$50K hh income*

**-- Where to Cut if Needed? - (Q. 45)**

Respondents were given the opportunity to name up to three areas or programs to cut if the Commission faced such a decision in order to balance the budget. In keeping with the results of the prior six surveys, “Parks and Recreation” topped the list, but, unlike every other survey through 2012, it was cited by fewer than ten percent of all responses offered in 2016 (7 percent) and 2014 (8 percent). The 2018 level of five percent marks its lowest recorded citation level and is in stark contrast to citation of this county program which in 2006, saw it named by a high of 49 percent. As noted, this five percent level is the highest of the 30-some specific program/service areas respondents reported they would cut, if necessary, so obviously, no area received a consensus of opinion in double digits. Indeed, the highest percent – 69 percent – is found among “Undecided” respondents; again setting the bar for this response.

**-- Awareness of County Activities in general - (Q. 46)**

In a question asked first posed in 2008 and repeated thereafter, respondents were asked to assess how aware they felt they were about county activities. With the 2008 results as a benchmark, the level of “Aware” jumps 12 points in the 2010 study and exhibits minor fluctuations through 2014. The 2016 results signal another spike in awareness of county activities with 69 percent reporting being at least somewhat aware of them but this was short-lived, with the 2018 results returning to a more typical level in the low 60’s. The following chart illustrates the progression over time:

2008	2010	2012	2014	2016	2018	
6%	9%	9%	8%	7%	9%	Very aware
48%	57%	54%	53%	62%	53%	Somewhat aware
<b>54%</b>	<b>66%</b>	<b>63%</b>	<b>61%</b>	<b>69%</b>	<b>62%</b>	<b>TOTAL AWARE</b>
<b>42%</b>	<b>34%</b>	<b>36%</b>	<b>38%</b>	<b>30%</b>	<b>37%</b>	<b>TOTAL UNAWARE</b>
24%	25%	24%	24%	21%	24%	Somewhat unaware
18%	9%	12%	14%	9%	13%	Very unaware
6%	---	1%	1%	1%	1%	Undecided/Refused

*Subgroups reporting “Unaware” in proportions greater than the norm of 37% included:  
(Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)*

<b>64%</b>	<b>County direction – Wrong track</b>
<b>51%</b>	<b>Vote in local elections – Seldom/Never</b>
	<i>State direction – Wrong track</i>
48%	<i>Ottawa compare – About the same</i>
	<b>County financial mgt. – Undecided</b>
<b>47%</b>	<b>Local direction – Undecided</b>
	<b>Taxes – Too high</b>
<b>46%</b>	<b>Local direction – Wrong track</b>
45%	<i>Region 5 residents</i>
44%	<i>County financial mgt. – Negative</i>
	<i>\$50K - \$75K hh income</i>
	<i>No college men</i>
43%	<i>Vote history – one of the last two</i>
	<i>Top issue (prompted) – Crime</i>
42%	<i>County services – Negative</i>
	<i>Website visitation – Little/Not</i>

#### **-- Information Sources - (Qs. 47-48)**

The 2016 survey introduced a battery of questions asking respondents if they had received information about county services from any of several media employed by the county to communicate with citizens. As can be seen in the following chart, “Mailed Information” is the most recognized means by which respondents recall having seen information about county services, supplanting “TV News” which was the top recognized medium in 2016 but is cited by far fewer 2018 respondents.

For the most part, the 2018 ranking of “Yes” responses mirror the rankings recorded in 2016. As noted, an exception is the smaller proportion of 2018 respondents reporting TV news, but another is “Social Media”. In 2016, social media ranked ninth out of the eleven presented communication media, with just 16 percent reporting having received information about the county from this communication tool. By contrast, 23 percent of 2018 respondents recognized social networks as a source of county information, elevating this medium’s ranking two spots to number seven. It is also worth noting that the county’s website was named as an information source by a proportion six points higher than that reported in 2016.

“Now I would like to describe to you some of the ways Ottawa County communicates with its citizens. For each, please tell me if you have received information about Ottawa County services, activities, and opportunities from each of the following sources within the past year?”

Sorted by most-to-least “YES” for 2018		Yes	No	Und/Ref
_47B. #1	Mailed information	66%	32%	2%
	2016 rank – 2	63%	36%	1%
_47H. #2	Television news	54%	46%	0%
	2016 rank – 1	64%	36%	0%
_47F. #3	Newspapers	54%	46%	0%
	2016 rank – 3	62%	37%	1%
_47G. #4	Radio news	49%	51%	0%
	2016 rank – 4	41%	58%	1%
_47C. #5	The Ottawa County Website: www.miOttawa.org	41%	58%	1%
	2016 rank – 5	35%	65%	0%
_47J. #6	Brochures found in County Offices	30%	69%	1%
	2016 rank – 6	31%	69%	0%
_47D. #7	Social networks (such as Facebook or Twitter)	23%	77%	0%
	2016 rank – 9	16%	84%	0%
_47I. #8	Community Presentations	18%	81%	1%
	2016 rank – 7	23%	76%	1%
_47A. #9	Emailed information	17%	82%	1%
	2016 rank – 8	18%	82%	0%
_47K. #10	Board and Committee meetings	13%	86%	1%
	2016 rank – 10	14%	86%	0%
_47E. #11	Text messages	5%	95%	0%
	2016 rank – 11	5%	95%	0%

47L. Somewhere else (please specify):

2016	2018 N=23	
100%	64%	Word of Mouth
0%	14%	Local Government
0%	8%	Library
0%	7%	Online – in general
0%	4%	School
0%	3%	Chamber of Commerce

In addition to the battery of “Yes/No” questions about having received information about the county via several media, the 2018 survey retained the question asked since the study’s inception asking respondents to identify which of twelve presented sources they receive most of their information about the county; with up to three responses being recorded. The results of this latest survey show that printed material (newspapers, mailed newsletters, and brochures at county offices) is the main source of county information for a plurality of four-in-ten respondents, but proportions for electronic sources continue to increase their proportional share over time. The following chart illustrates the observation:

47A-C. “Where would you say you get the most information about Ottawa County services, activities, and opportunities?”

<u>2012</u>	<u>2014</u>	<u>2016</u>	<b><u>2018</u></b>	
47%	45%	25%	21%	Newspapers
9%	9%	12%	16%	Mailed information-Newsletters
7%	5%	11%	15%	The Ottawa County Website: <a href="http://www.miOttawa.org">www.miOttawa.org</a>
15%	16%	17%	12%	Television news
0%	2%	5%	8%	Social networks (such as Facebook or Twitter)
0%	14%	8%	8%	Word of Mouth
5%	2%	8%	6%	Radio news
0%	1%	4%	4%	Emailed information
0%	0%	4%	3%	Brochures found in County Offices

**-- Preferences for receiving information - (Q. 49)**

Having just been asked the means by which they receive information concerning county government, the respondents are asked to name up to three sources through which they would prefer to receive such information. This question was first posed in 2010 and almost without exception, there has been a consistent and significant decline in a reported preference for newspapers with a concomitant increase in the proportions reported for E-mail, Website and, curiously, information via traditional mail. Preference for social network sites had not seen an increase from the 2014 (7 percent) results which were more than double the 2012 measurement (3 percent) but 2018 sees the first time this mode reaches double digits, measuring an 11 percent proportion. The following chart illustrates residents’ increasing reliance on and preference for electronic means of communicating information:

<u>2012</u>	<u>2014</u>	<u>2016</u>	<u>2018</u>	
14%	19%	24%	28%	Mailed information
0%	0%	15%	15%	Emailed information
30%	25%	19%	14%	Newspapers
0%	0%	12%	11%	The Ottawa County Website: <a href="http://www.miOttawa.org">www.miOttawa.org</a>
3%	7%	7%	11%	Social networks (such as Facebook or Twitter)
18%	17%	11%	9%	Television news
11%	5%	5%	4%	Radio news
7%	6%	2%	2%	Word of Mouth
14%	16%	0%	0%	“The Internet”

**-- Use of social media sites – Facebook continues to dominate - (Qs. 50-51)**

The 2010 survey saw the introduction of a question asking respondents how often they use social networks. The question seeks to measure frequency of use of this communication medium with six separate levels of frequency of use - ranging from “*Every day*” to “*Never*” - offered as possible responses. As a testament to the increased incorporation of this form of communication in the everyday lives of county residents, attention is drawn to the frequency of the “*Seldom/Never*” responses over time. As can be seen from the chart below, 2018 sees a five-point decline from 2016 of reported “seldom” or “never” responses and an eight point increase in “Every day”.

<b>FREQUENCY OF SOCIAL MEDIA USE</b>					
<u>2010</u>	<u>2012</u>	<u>2014</u>	<u>2016</u>	<u>2018</u>	
18%	29%	35%	36%	44%	Every day
6%	6%	5%	7%	6%	Most days
6%	11%	7%	9%	9%	A few times a week
1%	4%	3%	4%	1%	Several times a month
8%	4%	7%	5%	9%	Seldom
61%	46%	43%	39%	30%	Or Never
---	---	---	---	1%	Undecided/Refused

*Subgroups reporting “Seldom/Never” in proportions greater than the norm of 39% included:  
(Subgroups also appearing in the 2016 demographic analysis for this question are in **bold**)*

- 63% **Men 50+**
- 61% **Age 65+**
- 59% **Top issue (prompted) – Taxes**
- 51% *Info source preference – Newspapers*
- H.S. or less**
- 50% **Men**
- 49% *Info source preference – Mail*
- Age 50+*
- 48% *\$25K - \$50K hh income*

- 47% *Info source preference -- TV*
- 46% *Vote in local elections – All the time*
- 45% **Region 4 residents**  
**Residency – 25+ yrs.**
- 44% *Local direction – Wrong track*  
*Top issue (prompted) – Roads*  
*Financial mgt. – Positive*  
**Taxes – Too high**  
**Children at home – None**

As a side note, “Facebook” – at 87 percent – remains the overwhelmingly dominant site reported as being used, although a slight increase in the use of Instagram (4 percent, from 1 percent in 2016) is observed.

**-- Frequency of Internet connection - (Q. 52)**

As with the increased frequency of access to social networks, an increased incidence of “logging on” to the Internet is observed over time, with the 2018 measurement for “Every Day” reaching its highest recorded level at 88 percent.

FREQUENCY OF INTERNET ACCESS							
<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>2012</u>	<u>2014</u>	<u>2016</u>	<b>2018</b>	
67%	70%	75%	81%	84%	80%	88%	Every day
9%	9%	5%	5%	4%	6%	3%	A few times a week
4%	3%	2%	3%	1%	3%	2%	Once or twice a week
1%	1%	1%	2%	1%	0%	0%	A few times a month
0%	0%	0%	0%	0%	0%	0%	A few times a year
1%	1%	---	1%	1%	1%	1%	Seldom
14%	11%	14%	5%	7%	9%	5%	Never
4%	2%	2%	3%	2%	1%	1%	Doesn't have a computer ( <i>volunteered</i> )
0%	3%	1%	0%	0%	0%	0%	Undecided/Refused

*Subgroups reporting “Seldom/Never” in proportions greater than the norm of 6% included:  
(Subgroups also appearing in the 2016 demographic analysis for this question are in bold)*

- 15% **Age 65+**
- 11% **Ottawa comparison – About the same**  
*Info source preference – TV*  
*Post H.S.*
- 10% **County direction – Wrong track**  
*Top Issue (prompted) – Taxes*  
*County services – Negative*
- 9% **Women 50+**  
*Region 3 residents*  
**Local direction – Wrong track**  
*Children at home – No*  
**H.S. or less**

**-- Ottawa County website visitors and assessment of site quality - (Qs. 53-54)**

Respondents who reported they connect to the Internet at all (N=376) were asked how often they visit the Ottawa County website. The percentage of those responding “*Not at all*” has remained almost identical in the 2012 through 2016 studies. For those same three survey years, the usage options of “*A lot*”, “*Some*”, and “*Only a little*”, exhibited a similar nearly identical proportional result. The 2018 survey records a marked decline of 8 percentage points in, “Not at all” responses from the 2016 level of 54 percent, down to 46 percent. Obviously, this latter finding has each of the usage gradation proportions moving up to account for the difference.

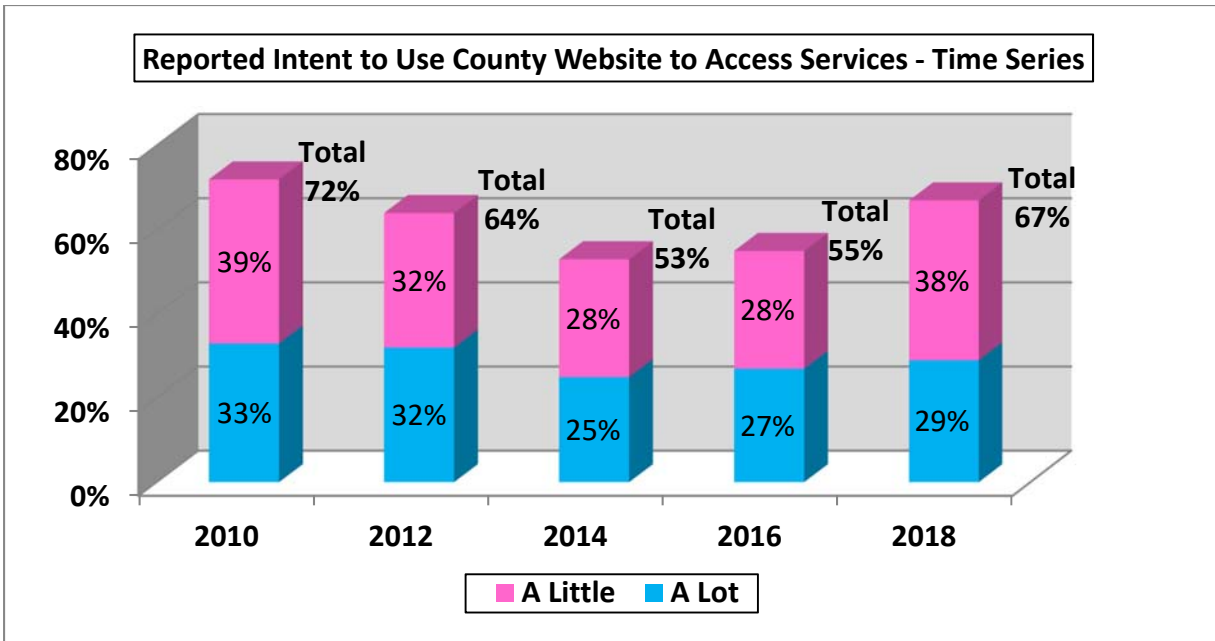
For those who reported having visited the county website (N=203), their assessment of its quality dropped eight points from its 2012 record high of 83 percent to 75 percent in 2014, with the 2016 level landing in between at 78 percent Total Positive rating. The 2018 “Total Positive” rating of 76 percent maintains the trend of the past two surveys’ rating measuring in the “mid-70’s” range.

**-- Interest in accessing county services via the web - (Q. 55)**

Respondents were asked if they would use the Ottawa County website more often if they could access county services by way of the Internet instead of making a trip to the county office complex. This question was first asked in 2010 and in that test only 18 percent of respondents offered an outright rejection of the notion. Enthusiasm for the possibility of conducting county business via the Internet waned, however, in the subsequent three surveys of 2012 through 2016, but rebounding in this latest 2018 study. In this most recent study, just over one-quarter of respondents reported an outright rejection of using the county website to transact business. The charts below illustrate the fluctuations for this question over time:

<u>2010</u>	<u>2012</u>	<u>2014</u>	<u>2016</u>	<u>2018</u>	
33%	32%	25%	27%	29%	Yes – a lot more often
39%	32%	28%	28%	38%	Yes – only a little more often
<b>72%</b>	<b>64%</b>	<b>53%</b>	<b>55%</b>	<b>67%</b>	<b>TOTAL MORE OFTEN</b>
18%	31%	38%	38%	26%	No
8%	4%	7%	4%	3%	Depends ( <i>volunteered</i> )
2%	1%	2%	3%	4%	Undecided/Refused





## SELECTED DEMOGRAPHICS

A 75 percent majority of survey respondents said they have called Ottawa County their home for more than 15 years or (down from 81 percent in 2016), with 25 percent reporting a residency tenure of 15 years or fewer. As is typical of most areas in the state, just under two-thirds of respondents (62 percent) report having no school age children in their home.

The racial make-up of the respondent pool is 91 percent Caucasian, down very slightly from prior years, with one percent each reporting their race as African American and Hispanic, and two percent reporting “Mixed race.” These proportions reflect, within the margin of error, the latest U.S. Bureau of the Census population estimates for voting age population based on race.

There had always been a fairly high level of formal education reported by respondents over the survey years but the 2018 measurement of 44 percent with a college degree is five percentage points higher than the next highest measurement for this level of education recorded in 2012, and 12 points higher than that measured in 2016. Thirteen percent report having received a post-graduate degree, and another 18 percent report some form of post-high school formal education. In all, 75 percent of respondents surveyed report receiving some form of formal education beyond high school.

Thirty-seven percent report a household income of \$75,000 or less – including 6 percent at \$25,000 or less. This proportion for 2018 is the lowest \$75,000 or less of the seven surveys conducted since 2006, the latter year seeing the highest proportion at 58 percent. Although within the margin of error, respondents reporting a household income over \$150,000 had been creeping up slowly, moving from three percent in 2008/2010 to eight percent in 2016 and logging at seven percent in the 2018 survey. More than nine-in-ten respondents (91 percent) report being homeowners, with the balance reporting either leasing, renting or refusing to offer a response.

As in all of its surveys of this nature, EPIC ▪ MRA attempts to stratify the male/female ratio in a manner that reflects conventional voter turnout based on gender. This produced a female/male ratio of 53-to-47 percent.

#####

**APPENDIX**

<b>REGION 1</b>	<b>REGION 2</b>	<b>REGION 3</b>	<b>REGION 4</b>	<b>REGION 5</b>
Holland City	Georgetown Twp.	Ferrysburg City	Allendale Twp.	Chester Twp.
Holland Twp.	Hudsonville City	Grand Haven City	Blendon Twp.	Coopersville City
Park Twp.	Jamestown Twp.	Grand Haven Twp.	Olive Twp.	Crockery Twp.
Zeeland City		Spring Lake Twp.		Polkton Twp.
Zeeland Twp.				Tallmadge Twp.
				Wright Twp.