

2016 ECONOMIC OUTLOOK HEALTH CHECK

Collaborating to build great places to grow a business

LAKE SUPERIOR COMMUNITY PARTNERSHIP

A summary of the results January 2016

Insights from the 2016 Economic Outlook Health Check Survey www.OutlookHealthCheck.com





Supporting Partners:





A Challenge to Us All

Everyone benefits from a renewed economy.

For our local economies to thrive, we need to cultivate communities that are great places to grow a business.

Business, nonprofit and public leaders can do their part by helping regions embrace and celebrate a forward-looking culture of entrepreneurialism even as we disagree about the best path forward. And each one of us can work within our own circles of influence to build healthy, high-performing organizations that thrive on a clear vision for the future. As we lead and develop healthy organizations, we make our communities great places to start and grow a business.

ABOUT THE SURVEY

The 2016 Economic Outlook Health Check

Program Background

The Economic Outlook Health Check is a free annual online survey that gathers the perspectives of business leaders on the economic outlook for their organizations and their economic regions. US and Canada chambers of commerce and economic development associations were invited to distribute this health check survey to their members. In return, each association receives a free report on their results compared to the overall results.

This program is offered at no charge because our sponsors generously support the program and our partner companies volunteer their expertise to run the program. Our goal is to work with associations to support healthy business growth throughout the US and Canada.

For 2016, the survey was conducted November 10, 2015 – December 11, 2015. This roughly 4-week data collection period allowed us to begin after the election season was completed and wrap up data collection before the busyness of the Christmas and holiday season set in.

For more information on the program visit: www.OutlookHealthCheck.com

Program Snapshot

The 2016 Economic Outlook Health Check involves input from 2,158 respondents through 154 associations throughout the US and Canada. This highly collaborative effort was designed to help promote economic growth by gathering feedback on how to cultivate great places to grow a business.

Who	2,158 members from 154 associations; 28 from Lake Superior Community Partnership
What	An outlook survey to members of chambers and other economic development associations
When	November 10, 2015 – December 11, 2015
Where	856 cities across all 50 US states and 6 Canadian provinces
Why	To spur discussion on economic growth and making great places to grow a business

Sources

We worked with 154 chambers of commerce and economic development associations who participated in the program and emailed survey invitations to their members. Below are the number of responses that we received for each of the participating association.

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Oregon, IL Raymond, WA Paintsville, KY Palisade, CO

Park Hills & Leadington, MO Pawnee City, NE Jasper, GA Pike County, IL Prince Rupert, BC Pullman, WA Radium, BC Asheboro, NC River County, MI River Valley, ME Rolling Meadows, IL San Anselmo, CA Saratoga Springs, NY Sauk Centre, MN Siren, WI Skiatook, OK Kalamazoo, MI Spearfish, SD Spring River Area, AR Spruce Grove, AB Canton, NY Sterling Heights, MI Dover, TN Medford, OR Ithaca, NY Warroad, MN Waseca, MN Waunakee, WI Cayce, SC Wethersfield, CT Alamo, GA Winnetka, IL Woodstock, ON Yuba City, CA

Our partnerships with these associations is the key to making this program unique among the economic surveys currently conducted. Respondents are people who are engaged to help build healthy, vibrant communities.

Island County Eco. Dev. Cncl.	Coupeville, WA	Oregon Area Chamber
Jackson County Eco. Dev. Auth.	Scottsboro, AL	Pacific County Economic Development Council
Katy Area Chamber	Katy, TX	Paintsville/Johnson County Chamber
Kindersley Chamber	Kindersley, SK	Palisade Chamber
Kingman Area Chamber	Kingman, AZ	Park Hills-Leadington Chamber of Commerce
Kings County Eco. Dev. Corp.	Hanford, CA	Pawnee City Chamber
Lake Gogebic Area Chamber	Bergland, MI	Pickens County Chamber
Lake Superior Community Partnership	Marquette, MI	Pike County Chamber of Commerce
Lakeshore Chamber	Stevensville, MI	Prince Rupert & Dist. Chamber
Lakeshore Chamber of Commerce	Stevensville-Baroda, MI	Pullman Chamber
Lee Chamber	Lee, MA	Radium Hot Springs Chamber
Little Rock Port Auth.	Little Rock, AR	Randolph County Eco. Dev. Corp.
Lone Pine Chamber	Lone Pine, CA	River Country Chamber
Lowell Area Chamber	Lowell, MI	River Valley Chamber
Mansfield Area Chamber of Commerce	Mansfield, TX	Rolling Meadows Chamber
Mason Area Chamber	Mason, MI	San Anselmo Chamber
Matawan-Aberdeen Chamber	Matawan, NJ	Saratoga Eco. Dev. Corp.
Matawan-Aberdeen Chamber of Commerce	Matawan, NJ	Sauk Centre CVB
Medicine Hat & District Chamber	Medicine Hat, AB	Siren Area Chamber
Mercer County Chamber	Harrodsburg, KY	Skiatook Chamber
Milton Area Chamber	Milton, WI	Southwest Michigan
Milton-Freewater Area Chamber	Milton-Freewater, OR	Spearfish Eco. Dev. Corp.
Mineola Economic Dev. Corporation	Mineola, TX	Spring River Area Chamber
Molokai Chamber of Commerce	Kaunakakai, HI	Spruce Grove & District Chamber of Commerce
Moundridge Area Chamber	Moundridge, KS	St. Lawrence County Chamber
Mount Olive Area Chamber	Mount Olive, NC	Sterling Heights Reg. Chamber & Ind.
Mount Pleasant Eco. Dev. Corp.	Mount Pleasant, TX	Stewart County Chamber of Commerce
Necedah Chamber	Necedah, WI	The Chamber of Medford/Jackson County
Newport County Chamber	Middletown, RI	Tompkins County Chamber of Commerce
Nome Chamber	Nome, AK	Warroad Area Chamber & CVB
North Newton Area Chamber	Newton County, IN	Waseca Area Chamber
North Shuswap Chamber	Scotch Creek, BC	Waunakee Area Chamber of Commerce
Northeast Kingdom Chamber	St. Johnsbury, VT	West Metro Chamber & Visitors Center
Norton Area Chamber	Norton, KS	Wethersfield Chamber
Ocean Shores/North Beach Chamber	Ocean Shores, WA	Wheeler County Chamber of Commerce
Okemo Valley Reg. Chamber	Ludlow, VT	Winnetka-Northfield Chamber
Old Town San Diego Chamber	San Diego, CA	Woodstock Dist. Chamber
Orchard Park Chamber	Orchard Park, NY	Yuba-Sutter Eco. Dev. Corp.



SUMMARY OF RESULTS

A review of the findings for Lake Superior Community Partnership

Economic Outlook

To measure the economic outlook, we asked individuals to rate the outlook for their company using a 1-10 scale. We then calculated the mean and indexed it on a 0 to 100 scale. The scores can be viewed much like weather temperatures. Scores in the 70's are pleasantly warm, the 60's are a bit cool, and anything in the 50's or lower is chilly.

The short 6-month outlook (70) is a bit lower than the 12-Month (75) and the 3-year (77) outlook. Respondents clearly think that early 2016 will still be a bit sluggish but will pick up a bit in the later part of the year.

	OUTLOOK	N = 2128	N = 28	DIFF
	6-Month Outlook	70	69	- 1
×	12-Month Outlook	75	72	-3
×	3-Year Outlook	77	72	-5

Note that the overall scores for all respondents is in the first column (yellow), while scores for the comparison respondents in this report are in the second column (blue). In the third column we show the difference between the scores. To the left of the chart are indicators. A \checkmark means that the segment score is significantly (at a 95% confidence level) above the overall score. A O indicates that the segment score is significantly lower than the aggregate. And a — means that the scores are about the same.

Significant Difference at 95% Confidence Level

- ✓ Significantly <u>above</u> the aggregate
- Significantly <u>below</u> the aggregate
- No significant difference

Lake Superior Community Partnership

2016 Plans

Four key measures provide additional insight into expectations for 2016. Less than half (43%) expect their company to hire more people in 2016. On a good note, though, more than 4 out of 5 (84%) expect to remain in the state/province. Similar to hiring expectations, just half (53%) expect to see growth for the company within the state/province, and even fewer (11%) expect to see growth globally for their companies.

2016 PLANS	N = 2128	N = 28	DIFF
 Hire more people	<mark>43</mark> %	43 %	0%
 Remain in the state / province	84%	86%	2%
 Grow within the state / province	53%	50%	- <mark>3</mark> %
 Grow globally	11%	14%	3%

Significant Difference at 95% Confidence Level

- ✓ Significantly <u>above</u> the aggregate
- Significantly <u>below</u> the aggregate
- No significant difference

2016 Priorities

We asked respondents to indicate which of the following are top priorities for their state/province in 2016. Compare the segment scores to the overall to see how your state/province may differ from the aggregate.

	2016 PRIORITIES	N = 2128	N = 28	DIFF
	Improving education	61%	57%	-4%
	Lower healthcare costs	60%	64%	4%
	Fixing roads and bridges	58%	75%	17%
	Simpler regulation	54%	46%	- 8 %
	Attracting and retaining top talent	<mark>53%</mark>	57%	4%
	Lower taxes	52%	39 %	<mark>-13</mark> %
	More available skilled labor	50%	54%	4%
\checkmark	Lower energy costs	41 %	75%	34%
	Ensuring clean water	34%	32%	- 2 %
	Better access to capital	25%	18%	-7%
	Revitalizing major cities	24%	21%	-3%

Significant Difference at 95% Confidence Level

✓ Significantly <u>above</u> the aggregate

Significantly <u>below</u> the aggregate

No significant difference

Company Culture

The aggregate economic outlook depends on how well the myriad of public, private, and nonprofit entities are managed. Healthy organizations with a culture of high performance are able to navigate fluid economic circumstances to make the adjustments needed to continue to grow.

The culture experts at Denison Consulting (<u>www.denisonconsulting.com</u>) list 60 key attributes for measuring company culture. Borrowing from the Denison model we incorporated four key measures on company culture that point to the overall health of the organization.

~	COMPANY CULTURE	N = 2128	N = 28	DIFF
	Is focused on adapting to change	80	82	2
\checkmark	Articulates a vision for the future	78	84	6
	Is an example of high performance	78	78	Φ
	Involves all staff in decision-making	67	69	2

Overall, companies are doing well at focusing on adapting to the changing business circumstances. Companies also do fairly well at articulating a vision for the future and creating a high-performing organization. However, companies seem to lag a bit when it comes to involving the staff in company decisions, a factor growing in importance as firms seek greater engagement and involvement from employees.

Significant Difference at 95% Confidence Level

- ✓ Significantly <u>above</u> the aggregate
- Significantly <u>below</u> the aggregate
- No significant difference

Economic Region

The greatest opportunity for impacting economic growth beyond the individual organizations is at the economic region level. The economic regions within a state or a province differ significantly from one another and require specific attention to the unique business needs of the area.

None of the economic region scores are in the 70's, and scores for talent and technology are deep lows in the 40's. One attribute to focus on is a culture of entrepreneurialism. In our analysis, this measures shows up as an important driver of the outlook for companies in the region. Companies thrive when entrepreneurialism is promoted and supported as a natural part of the culture.

	MY REGION	Ν	= 2128	Ν	= 28	DIFF	
\checkmark	Has an unparalleled quality of life		67		84	17	
\checkmark	Has a forward-looking culture that embraces entrepreneurialism		57		67	10	
\checkmark	Has an educational system that is second to none		55		60	5	
\checkmark	Is unified in its pursuit of economic development		54		59	5	
\checkmark	Collaborates well to minimize divisions and facilitate progress		53		62	9	
\checkmark	Has a large pool of skilled, educated talent available for hire		48		56	8	
\checkmark	Has an unquestionable identity as a vibrant technology hub		44		61	17	

Significant Difference at 95% Confidence Level

✓ Significantly <u>above</u> the aggregate

Significantly <u>below</u> the aggregate

No significant difference

State/Province

People generally feel good about their state or province as a great place for raising a family. At the bottom of the list, however, are attributes measuring the climate of the state/province conducive for business growth: being business-friendly, having effective leaders, and being a great place to grow a business. Naturally, then, respondents provide the lowest scores for the state/province as being on the right track and having a vibrant economy.

	MY STATE / PROVINCE	N = 2128	N = 28	DIFF
\checkmark	Is a great state for raising a family	76	86	10
\checkmark	Is a great place to grow a business	60	63	3
\checkmark	Is a great state for young professionals	60	64	4
\checkmark	Has effective business, nonprofit, and government leaders	58	67	9
\checkmark	Is on the right track	58	71	13
\checkmark	Is business-friendly	57	62	5
	Has a strong, vibrant economy	57	58	1

Significant Difference at 95% Confidence Level

- ✓ Significantly <u>above</u> the aggregate
- Significantly <u>below</u> the aggregate
- No significant difference

Likelihood to Recommend

The willingness to recommend a product or service is an important metric used by many businesses to gauge the level of engagement their customers have with the company. The likelihood to recommend measure is a strong indicator of how people talk about community, region, or state/province.

Scores for likelihood to recommend the community, region, or state/province as a great place to grow a business are soft for the US and Canada overall. Scores hovering around the mid to upper 60's indicates a general reluctance to give a good referral to friends, family, and colleagues.

	RECOMMEND	N = 2128	N = 28	DIFF
\checkmark	Recommend Local Community	66	77	11
	Recommend Region	67	69	2
\checkmark	Recommend State / Province	67	71	4

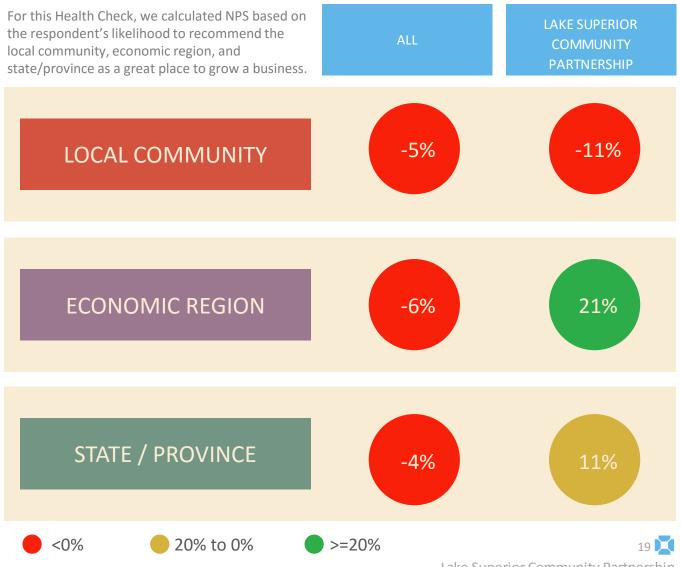
Compare your scores to the aggregate and consider what they might mean for your community, region, or state/province. Think of the segment scores and imagine what the respondents would say if someone asked "Should I start my new business in this area?" or "I will be graduating soon and wondered where I should be looking to find great business opportunities." If respondents have a low score for the likelihood to recommend, it's likely that they are telling others that the community, region, or state/province is not a great place to start or grow a business.

Significant Difference at 95% Confidence Level

- ✓ Significantly <u>above</u> the aggregate
- Significantly <u>below</u> the aggregate
- No significant difference

Net Promoter Score (NPS)[®]

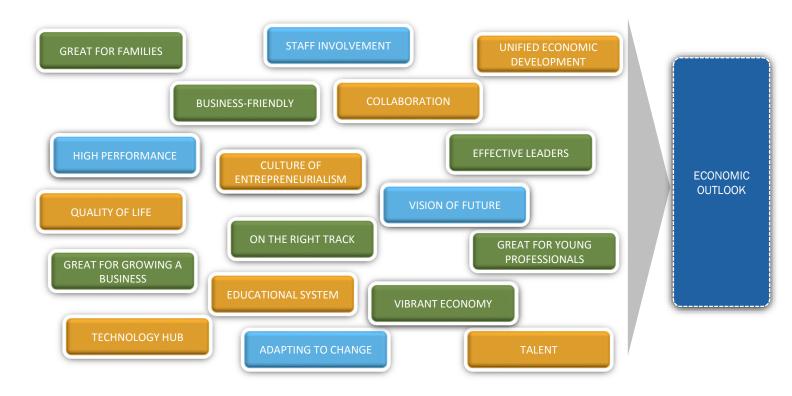
The popular NPS[®] metric developed by Frederick Reichheld measures the level of customer engagement. Using a 0-10 scale for likelihood to recommend, NPS equals the % of Promoters (-9-10) minus the % of Detractors (0-6).



Lake Superior Community Partnership

Drivers of Economic Outlook

Finally, to better understand the elements that foster economic outlook, we analyzed the complete set 2,158 responses for of company measures, regional measures, and state measures and identified four key factors that drive a positive economic outlook.



4 Primary Factors

As you think about actions steps for 2016, keep these primary factors in mind:

- 1. Companies that articulate a vision of the future
- 2. Companies that are examples of high performance
- 3. Regions that have a forward-looking culture that embraces entrepreneurialism
- 4. A state or province that has a strong, vibrant economy



Coefficients^a

		Unstandardize	d Coefficients	Standardized Coefficients		
Model		В	Std. Error	Beta	t	Sig.
1	(Constant)	3.034	.190		15.987	.000
	Articulates a vision for the future	.297	.025	.292	11.887	.000
	ls an example of high performance	.108	.025	.105	4.275	.000
	Has a forward-looking culture that embraces entrepreneurialism	.111	.018	.144	6.325	.000
	Has a strong, vibrant economy	.157	.018	.196	8.846	.000

a. Dependent Variable: 3-Year Outlook

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.534ª	.285	.283	1.584

a. Predictors: (Constant), Has a strong, vibrant economy, Is an example of high performance, Has a forward-looking culture that embraces entrepreneurialism, Articulates a vision for the future

SUMMARY OF RESULTS

STATE LEVEL: FOCUS ON THE TOP PRIORITIES FROM THESE RESULTS TO HELP YOUR STATE/PROVINCE DEVELOP A STRONG, VIBRANT ECONOMY

2 <u>REGIONAL LEVEL</u>: CULTIVATE A FORWARD-LOOKING CULTURE THAT CELEBRATES, EMBRACES, AND SUPPORTS ENTREPRENEURIALISM

3

ORGANIZATIONAL LEVEL: ENCOURAGE ALL LEADERS TO ARTICULATE A CLEAR AND COMPELLING COMPANY VISION AND FOSTER AN ORGANIZATIONAL CULTURE THAT IS AN EXAMPLE OF HIGH PERFORMANCE





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