

Bowman County Strategic Growth Plan

County Residential Survey Results | April 2021



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Bowman County Development Corporation Economic Growth Planning Process

Overview of the Planning Process

The Bowman County Development Corporation is undertaking a multi-step process that will result in the creation of a strategic economic growth plan. This plan will be designed to provide a shared vision of economic and community development as well as a roadmap to guide leaders and residents in growing Bowman County.

The Bowman County Development Corporation has hired Jason Matthews of JM Strategies LLC to manage and facilitate the planning process. JM Strategies collaborated with Teran Doerr, Bowman County Development Corporation executive director, in creating a research process consisting of quantitative and qualitative research.

The first step in the research process was an online survey of Bowman County residents. Individuals were invited to answer 22 questions on various aspects of economic and community development. Questions were designed to capture residents' sentiments, perceptions, and attitudes. The survey was available on the Bowman County Development Corporation website from March 3 through 31, 2021. One hundred and ninety-nine (199) residents participated in the survey.

The results of this survey, and additional project research, will serve as the framework for upcoming focus group sessions, which will be held later this spring. The information gathered from the focus group sessions will provide the foundation for comprehensive planning sessions later this summer.

Purpose of this Report

This report conveys the data, ideas, concerns, observations, and suggestions of the 199 individuals who participated in Bowman County residential survey.

Where appropriate in this report, JM Strategies provides 'key takeaways,' which are intended to offer additional context and perspective for the Client's consideration.

Special Note: Please note the following as you read this report. First, some participants did not provide answers to every question. Second, responses to open-ended questions have been summarized out of respect to survey participants who offered their candid responses. Finally, percentages may exceed 100 percent due to rounding.

Survey Results and Key Takeaways

1. From an economic development standpoint, where do you want to see Bowman County in the next five years? (Click three choices.)

- An economy with a range of job opportunities that offer upward mobility	117
- Communities with a vibrant Main Street	107
- Communities that appeal to young families	104
- Support of start-ups and entrepreneurs	47
- Provide value-added opportunities for agriculture	47
- Increased population	39
- Continuing education programs and opportunities	32
- Increase per capita income	31
- Other (please specify)	14
- Increased number of visitors to the country	13
- Mentorship opportunities for future community leaders	12

Other Responses:

- *With the number of houses continuing to be placed on the market, lack of youth activities, and lack of professional advancement opportunities. I do not see an increase in population occurring, but rather a decrease.*
- *Vibrant economy, not just on Main Street, but throughout the communities.*
- *Keeping the current businesses thriving.*
- *Taking care of the older generation.*
- *24-hour dining sit down service.*
- *I see a decline in population and services.*
- *Opportunities which incorporate use and development of technology.*
- *Help to neighboring towns that are in Bowman County – help fix streets and sidewalks.*
- *Clean energy production and jobs.*
- *Effort made to keep the population we have.*
- *The opportunities to not only be in the City of Bowman but to be in the other communities in the county.*
- *Less people working at the EDC but need to volunteer more.*
- *Would like to see Industrial Park filling up.*
- *Development of affordable housing.*

✓ **Key Takeaway:** The support for the first three choices is resounding. These three issues must serve as a key parts of the framework for all planning discussions moving forward. However, it will be our task to break these issues down further and, where possible, provide context and public education in our visioning process. Some points to consider and questions we need to ask:

- **Data:** Let’s look at the jobs and census data to guide discussions on an economy with a range of job opportunities that offer upward mobility.
- **Pandemic’s Long-Term Impact:** Let’s also try to assess the impact COVID-19 and telecommuting will have on jobs in Bowman County.
- **What do vibrant Main Streets look like?:** Are people’s perceptions of Main Street rooted in the past? If so, how we do change those perceptions and help people see the local economy at large?
- **‘Must Haves’:** What are the “must haves” for communities to appeal to young families? Let’s conduct an inventory and assess shortcomings along with current and anticipated future needs.

2. Please rate the following business and community services and amenities.

	Exceeds Expectations	Meets Our Needs	Improvements are Necessary	Serious Problems Exist	No Opinion
Cell phone service	13	128	44	10	2
Internet service	32	131	29	3	3
Utilities	29	142	18	4	2
Emergency services	41	122	29	1	3
Access to health care services	25	103	56	13	2
Nursing / assisted living	23	100	47	10	18
Housing availability	22	76	74	29	13
Overall condition of housing inventory	6	78	76	21	15
City streets and county highways/roads	30	108	51	10	0
Entertainment and dining	1	21	105	70	0
Arts & cultural programs/facilities	2	52	86	37	22
Wellness & exercise facilities	25	115	46	5	8

✓ **Key Takeaway:** Combining the results of responses for ‘Exceeds Expectations’ and ‘Meets Our Needs’ provides us with a positivity score. As such, the mass majority of services and amenities have earned high – and, in some cases, very high – scores. The areas where improvements are necessary or serious problems are seen to exist are not surprising. Entertainment, dining, arts, and cultural programs and facilities will be part of a larger discussion on quality of life and place.

3. How well does Bowman County meet your expectations in the following areas?

	Very Satisfied	Satisfied	Neutral	Unsatisfied	Very Unsatisfied
Employment opportunities at all income levels	7	62	86	41	3
Career advancement at all income levels	4	43	96	52	4
Wage levels	4	62	88	42	3
Entrepreneurial support	6	50	103	32	6
Cost of living	7	70	67	47	7
Community leadership	16	63	71	36	12
County leadership	9	61	78	38	12
'Quality of Life' amenities	6	72	70	43	8
Activities and things to do	1	53	57	71	17

✓ **Key Takeaway:** A good way to read these numbers is to initially set aside neutral responses and combine the very satisfied/satisfied and very unsatisfied/unsatisfied responses. This provides a clearer picture on the results.

	<u>Satisfied / Very</u>	<u>Unsatisfied / Very</u>
▪ Employment opportunities at all income levels	69	44
▪ Career advancement at all income levels	47	56
▪ Wage levels	66	45
▪ Entrepreneurial support	56	38
▪ Cost of living	77	54
▪ Community leadership	79	48
▪ County leadership	70	50
▪ 'Quality of Life' amenities	78	51
▪ Activities and things to do	54	88

How to Read 'Neutral' Responses: As you can see, there were a very high number of 'neutral' responses. It has been my experience that many respondents genuinely don't feel they know enough to answer some topics. When one reads this question, this is especially the case when it comes to *entrepreneurial support, community leadership, and county leadership*.

However, it is also likely there are some respondents who chose 'neutral' rather than 'unsatisfied' as their response. If an individual is 'satisfied,' he or she will identify as such. This is not always the case when it comes to selecting 'unsatisfied' or 'very unsatisfied' as a response. Therefore, we should operate from a working assumption that some 'neutral' responses are really 'unsatisfied.'

4. How would you fill in the following statements? "I am..."

... to recommend Bowman County as a place to live."

▪ Very Likely	88	44%
▪ Somewhat Likely	92	46%
▪ Not Likely	19	10%

... to recommend Bowman County as a place to start a business."

▪ Very Likely	46	23%
▪ Somewhat Likely	102	51%
▪ Not Likely	50	26%

... to recommend Bowman County as a place to visit."

▪ Very Likely	59	30%
▪ Somewhat Likely	95	48%
▪ Not Likely	45	23%

... to relocate outside of Bowman County."

▪ Very Likely	22	11%
▪ Somewhat Likely	63	32%
▪ Not Likely	114	58%

5. Follow-up to Question 4: If you indicated that you are somewhat likely or very likely to relocate out of Bowman County, please provide your reasoning below.

Sixty-three (63) residents provided answers to this open-ended question. Among the four (4) major and consistent findings were:

- Retirement: Desire to be closer to medical care and/or family; lifestyle changes with age
- More and better job opportunities
- High housing costs
- Desire to relocate to be closer to outdoor recreation (mountains, lakes, etc.) or in a city with more options for entertainment, shopping, and cultural pursuits

6. What do you see as Bowman County's greatest strengths and weaknesses?

	Major Strength	Strength	Weakness	Major Weakness	No Opinion
Affordability of living	9	91	56	16	24
Available buildings/lots for new businesses	11	117	39	8	22
Quality K-12 education	66	100	12	2	19
Health Care	28	97	53	16	4
Ease of doing business / regulatory environment	14	114	28	7	36
Tax environment	8	95	35	13	46
Quality of life amenities	7	79	66	24	21
Crime and personal safety	61	104	20	7	7
Access and affordability of high-speed Internet for homes and businesses	41	113	32	3	10
Organized business leadership	12	78	51	14	43
Support for existing leadership	8	69	53	16	50
Housing options (rental and home ownership)	8	99	50	13	26
City streets and county highways / roads	30	116	33	10	10
A shared vision of where Bowman County is going	7	53	72	23	43
Workforce skills and availability	2	63	77	30	27

✓ Key Takeaways: Here is a comparison of combined numbers...

	<u>Strongly/Agree</u>	<u>Strongly/Disagree</u>
▪ Affordability of living	100	72
▪ Available buildings/lots for new businesses	128	47
▪ Quality K-12 education	166	14
▪ Health Care	125	72
▪ Ease of doing business / regulatory environment	128	35
▪ Tax environment	103	48
▪ Quality of life amenities	86	90
▪ Crime and personal safety	165	27
▪ Access and affordability of high-speed Internet	154	35
▪ Organized business leadership	90	65
▪ Support for existing leadership	77	69
▪ Housing options (rental and home ownership)	107	63
▪ City streets and county highways / roads	146	43
▪ A shared vision of where Bowman County is going	60	95
▪ Workforce skills and availability	65	107

7. In your opinion, what are Bowman County's three greatest assets? (Select three options)

▪ K-12 education	146
▪ Sense of community	93
▪ Location	59
▪ Access to medical care	58
▪ Desirable cost of living	53
▪ Adequate infrastructure	49
▪ Quality affordable housing	25
▪ Recreational opportunities	24
▪ Job opportunities and options	15
▪ Community amenities	14
▪ Skilled workforce to meet the needs of the county	13
▪ Business retention and expansion	9
▪ Ability to attract new businesses and industries	6
▪ Vibrant Main Streets	6
▪ Regional attractions / visitor destination	5

8. In your opinion, what is Bowman County's greatest economic challenge? (Choose only one option.)

▪ Lack of available workforce	85	43%
▪ Providing adequate job opportunities	41	21%
▪ Providing adequate amenities (education, retail, health care, parks, etc.)	31	16%
▪ Other (please specify)	19	10%
▪ Providing a suitable range of housing options	18	9%
▪ Providing adequate services and utilities	5	3%

Other Responses: Major and/or consistent findings were...

- *Desire for more dining and entertainment options*
- *Health care*
- *Senior housing*
- *Housing: Costs of housing and lack of developed residential lots*
- *Need to attract new businesses and industries*
- *Lack of developed lots*
- *Sales tax structure and competition from sales tax-free Montana*

9. To what extent do you agree or disagree with the following statements about Bowman County's economy?

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Businesses are growing	3	22	76	84	13
K-12 schools offer a quality education	57	109	27	5	1
Bowman County is a visitor destination	3	29	66	81	19
Bowman County is a business destination	3	29	67	87	13
Local government and businesses cooperate on community and economic development	10	64	88	31	6
Wages and salaries make it possible to maintain my standard of living	10	82	60	39	8
Entrepreneurs can start businesses and succeed	3	52	83	55	5
Infrastructure is well maintained and meets needs	18	88	68	21	4
The overall mix of employers is adequate	4	56	80	53	5

✓ **Key Takeaway:** The findings are as follows when you combine responses...

	<u>Strongly/Agree</u>	<u>Strongly/Disagree</u>
▪ Businesses are growing	25	97
▪ K-12 schools offer a quality education	166	6
▪ Bowman County is a visitor destination	31	100
▪ Bowman County is a business destination	31	100
▪ Local government and businesses cooperate on community and economic development	74	37
▪ Wages and salaries make it possible to maintain my standard of living	92	47
▪ Entrepreneurs can start businesses and succeed	55	60
▪ Infrastructure is well maintained and meets needs	106	25
▪ The overall mix of employers is adequate	60	58

10. What type of business and industry do you want to see in Bowman County? (Please select three options.)

▪ Dining	143
▪ Retail	89
▪ Homegrown / local businesses	81
▪ Entertainment	76
▪ Manufacturing / light industry	59
▪ Advanced / value-added agriculture	46
▪ Energy	42
▪ Service providers (financial, insurance, medical, legal, personal care, childcare, etc.)	27
▪ Tourism	15
▪ Other (please specify)	4

Other Responses:

- Plumbers, electricians, HVAC, flooring installers, etc. – go to Wahpeton and recruit NDSCS grads.
- Non-alcohol related activities
- Youth activities, i.e.: dance, t-ball, basketball camp, etc.
- Dry cleaner and diesel mechanic

11. What do you believe is the ONE biggest challenge in attracting and retaining new talent to Bowman County? (Please select one.)

▪ Lack of social and entertainment options to appeal to new individuals	72	37%
▪ Lack of jobs with upward mobility	51	26%
▪ Business environment challenges to start a business	23	12%
▪ Lack of awareness of what Bowman County has to offer	22	11%
▪ Inability to find social groups	21	11%
▪ Other (please specify)	10	5%

Other Responses: Major and/or consistent responses were...

- Workforce, limited employment opportunities and potential for career advancement
- Costs of housing
- Lack of shopping options

12. Please select the ONE word or phrase from the following list that you feel best describes the current state of Bowman County's economy? (Please select one word or phrase.)

▪ Holding Its Own	69	35%
▪ Struggling	36	17%
▪ Declining	32	16%
▪ Limited	32	16%
▪ Underappreciated	10	5%
▪ Successful	9	5%
▪ Failing	8	4%
▪ Thriving	2	1%
▪ Vibrant	1	0.5%
▪ Booming	0	

✓ **Key Takeaway:** Combining 'positive' and 'negative' sentiments provides us with clearer picture...

- Positive:	99	(49.7%)	<i>Responses to the following: Holding its own, underappreciated, successful, failing, thriving, vibrant, and booming.</i>
- Negative:	100	(50.3%)	<i>Responses to struggling, declining, limited, failing.</i>

13. How would you rate the performance of the economy in Bowman County over the last five (5) years?

▪ A – Excellent	3	2%
▪ B – Above Average	38	19%
▪ C – Average	101	51%
▪ D – Below Average	43	22%
▪ F – Failure	4	2%
▪ Unsure	10	5%

✓ **Key Takeaway:** One hundred and forty-two (142) respondents (71%) answered A, B, or C as opposed to 47 individuals (24%) who selected D or F.

14. What are the biggest threats to Bowman County’s economic resiliency? (Please click all that apply.)

- Limited number of businesses and industries 119
- Aging population 116
- Limited workforce 115
- Lack of local support 52
- Income inequality 34
- Location 32
- Other (please specify) 14

Other Responses: Major and/or consistent responses were:

- *Lack of overall county-wide vision for economic development*
- *Declining energy industry*
- *Online shopping*
- *“Small town” culture*

15. What should be the region’s top three priorities for economic development? (Please select three strategies.)

- Attract and retain young professionals and families 125
- Encourage the growth of existing businesses and industries 83
- Improve the quality of life and regional amenities such as livability and recreation 76
- Encourage downtown revitalization 75
- Encourage recruitment and diversification to create higher-paying jobs 63
- Increase job skills of local labor force 44
- Create a unified vision and strategy for regional growth 34
- Improve the availability of a range of housing options 27
- Create a strong entrepreneurial climate 26
- Improve government cooperation on a regional level 10
- Improve access and affordability of high-speed Internet for homes and businesses 8

✓ **Key Takeaway:** Attracting and retaining young professionals and families is, as you can see, the clear top priority. After that, the next four priorities are all closely ranked. As such, we should regard these as the top five priorities for future discussions. Fortunately, each of them fits within the top three responses to Question 1, which were:

- An economy with a range of job opportunities that offer upward mobility
- Communities with a vibrant Main Street
- Communities that appeal to young families

Taken together, we have three themes and five issues for our visioning sessions around.

16. If you could say one thing that would make Bowman County a better place to live or work what would it be?

One hundred and three (103) residents provided answers to this question. Among the major and/or consistent responses were...

- Attracting new businesses and higher-paying job opportunities
- Affordable housing
- Desire for ‘More’: More dining and retail options; more recreational opportunities
- Stronger local support of existing businesses
- Retention of younger people and families
- Overhauling sales tax structure
- Less dependency on the energy industry

17. How long have you lived in Bowman County?

▪ 21 or more years	74	37%
▪ Entire life	40	21%
▪ 11 – 20 years	39	20%
▪ 5 – 10 years	30	15%
▪ Less than five years	15	8%

18. What is your gender?

▪ Female	134	67%
▪ Male	65	33%

19. What is your age?

▪ 30 – 49	91	46%
▪ 50 – 64	49	25%
▪ 65 or older	36	19%
▪ 18 – 29	20	10%
▪ 17 or younger	3	2%

20. What is the highest level of education you have attained?

▪ Bachelor's degree	69	35%
▪ Graduate or professional degree	38	20%
▪ Associate's degree	35	18%
▪ Some college but no degree	30	15%
▪ High School graduate or GED	21	11%
▪ Workforce certification	6	3%

21. Please identify the sector in which you are currently employed.

▪ Private business employee	58	29%
▪ Private business owner	31	16%
▪ Education – teacher, administrator, paraprofessional, employee	27	14%
▪ Nonprofit employee or manager	24	12%
▪ Other (please specify)	21	11%
▪ Retired	20	10%
▪ Government employee – local, county, state, federal	18	9%

22. Please share any additional comments you may have with us in the space below.

Thirty-seven (37) residents shared additional thoughts. Major and/or consistent responses are as follows...

- Desire for greater community and county collaboration
- More unified growth strategy among municipal leaders
- Evaluation of EDC
- Desire for more dining options along with recreational and entertainment choices
- Review county tax structure
- Address affordable housing and childcare challenge
- Desire to 'think big,' capitalize on location, make the county a destination, etc.
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