

NORTHWEST LOWER MICHIGAN REGION #10

2025

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)

**Prepared by Networks Northwest
for Northwest Lower Michigan Counties:**

Antrim | Benzie | Charlevoix | Emmet | Grand Traverse

Kalkaska | Leelanau | Manistee | Missaukee | Wexford

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PREFACE

This Comprehensive Economic Development Strategy, referred to as the “CEDS”, is the result of the community of Northwest Lower Michigan convening to define and improve the regional economic conditions that affect communities in their local economic development efforts.

The process undertaken for the development of the CEDS is that of seeking collaborative open communication amongst the region’s Economic Development Organizations and economic development stakeholders. The business community, employers, employees, elected & appointed officials and the public at large are afforded the opportunity to provide comment on the plan and process through a required thirty day public review period upon completion of the draft document.

The CEDS process was initiated in late 2024 with the development of a scope of work within the Networks Northwest Community Development Department. The scope of work outlined a process to build upon the 2021 CEDS document and process. Networks Northwest recruited a CEDS Task Force composed of representatives from a multitude of employment sectors. The Task Force reviewed the previous CEDS document, undertook a SWOT Analysis Survey, and reviewed strategy statements.

Community Development Staff duties were process facilitation, meeting preparation and timeline management, research and information gathering, document preparation, and review and approval proceedings for the completed CEDS.

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INTRODUCTION

The Comprehensive Economic Development Strategy should align and support the Vision and Mission of the supporting agencies. Networks Northwest has been a convener of discussions involving economic development within our region for over four decades. The Vision and the Mission of the organization seek to support our region's communities through collaboration.

MISSION STATEMENT

Our mission is to build stronger communities and enhance the quality of life in Northwest Michigan by providing a regional framework for effective collaboration among integrated service networks and by directly providing services related to talent, business, and community development.

VISION FOR NORTHWEST MICHIGAN: THRIVING, SUSTAINABLE, AND INCLUSIVE FUTURE

In the best-case scenario for Northwest Michigan in the next five to ten years, the region envisions a thriving and diverse economy with stable or rising wages and increased job opportunities that attract and retain young people and college graduates. Affordable, attainable, and attractive housing, along with accessible childcare options, are available. The region prioritizes placemaking, creating vibrant, healthy communities with ample arts and cultural opportunities, a range of industries, and growing economic opportunities for all, fostering inclusivity and diversity (more diverse than just young families and old, focusing on talented and skilled individuals over only college-educated).

Natural resources are protected and enhanced, with ample green spaces and well-maintained air and water quality. Infrastructure is improved, including better roads, expanded non-motorized trails, and increased public transportation options. Governments collaborate and share services for greater efficiency, with the three legs of the stool (government, business, non-profits) sharing for efficiency. Education opportunities are competitive, and training programs are available for high-skilled labor and technology positions. Growth is carefully planned to balance economic development with environmental protection and infrastructure needs.

The region becomes a desirable place to raise a family and enjoy retirement, with a mix of young families and older residents. This scenario also includes civic participation, defining small town character as connection with people over space, creating opportunities to support connections, working with communities to develop quality of development and design standards (which are subjective but save costs and streamline processes), sustainable and technologically innovative development that shifts to a better look, and preserving agriculture lands. Federal, State, and local funding resources are needed to make this happen, childcare is addressed as a barrier to economic development, and elder care allows for aging in place. Better, safer roads for the transportation network are present, with transportation options including public-private partnerships, not just public, encompassing roads, trails, transit, and a complete network.

REGIONAL GEOGRAPHY

A popular tourist destination, Northwest Michigan is home to several small to medium-sized communities, extensive state and national forests, lakes and rivers, and a large portion of Lake Michigan shoreline. The region has a significant seasonal population much like other regions that depend on tourism as an important industry in the region.

Northwest Lower Michigan is a ten-county region encompassing Antrim, Benzie, Charlevoix, Emmet, Grand Traverse, Kalkaska, Leelanau, Manistee, Missaukee, and Wexford Counties. There are several growth and investment areas in the region with Traverse City and Cadillac considered metropolitan areas by the Census Bureau based on their respective population densities. Outside of these urban areas, a rural atmosphere, with villages, parks, farms, orchards, vineyards, forests, and coastal lands all contribute to the local and regional economies.

There are 190 incorporated political jurisdictions in the ten-county region, which are organized as village, township, city, and county governments. The most prevalent unit of local government in the region is township government with a total of 139 in northwest Lower Michigan. In addition to general purpose local governments, there are numerous special purpose local governments. There are three federally recognized Native American Tribes, forty-one school districts, four intermediate school districts and three community colleges. Special districts and authorities such as downtown development authorities, transit authorities and library boards also overlay and sometimes overlap the general purpose geopolitical boundaries.

County Community and Information Maps are available on the Growth and Investment page of the Networks Northwest website here '[County Community Maps](#)'.

SUMMARY OF ECONOMIC CONDITIONS IN NORTHWEST MICHIGAN

The CEDS summary background information for the northwest Michigan region describes the current economic conditions and helps present a clear understanding of the relevant economic issues. The data presented in the summary background and appendices is important to connect with the Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis discussed later in the CEDS.

HOUSING

Housing is one of our most basic human needs: where we live affects our health, wealth, access to opportunity and quality of life. Without safe, adequate, affordable housing, individuals face serious challenges to meeting their basic needs. When area residents struggle to meet their basic housing needs impacts are felt throughout the community. On our roads, residents commute further between work and home, in our schools, we struggle with declining enrollment as young families leave our communities to find more affordable housing; and in our businesses, which lose customers when residents have less disposable income due to high housing and transportation costs. Shortages of affordable housing exist throughout the Northwest region of Michigan, and because of this, many families live farther from jobs, schools, and shopping to find homes they can afford. Housing shortages also occur when developers focus on building large single-family homes which have been profitable for developers in the past but do not meet the needs of the community. Focusing on building single-family homes limits the potential for building other types of housing in the region such as rental units, mixed use developments, smaller houses for senior citizens, and housing for those with disabilities.

Finally, costs are being driven up by suppliers unable to keep pace with the demand and by an unprecedented increase in construction costs of land, labor and materials, particularly in high-growth areas of Michigan. To help address the persistent problem of the housing shortage, the region is served by numerous public agencies, nonprofits, and private sector interests. In particular, the non-profit organization Housing North provides outreach, messaging and communications tools; advocates for policies support housing development opportunities in rural Michigan; and works with partners to develop new tools and funding options for housing. The organization's 2023 Housing Needs Assessment for the region takes into account the demographics, economics and housing supply of the region, along with the input of area stakeholders and major employers, and estimates the housing gaps of the region between 2022 and 2027 (Table1).

Table 1: Housing Needs Assessment

County	Median Household Income	Rental Housing Gap Estimates (2022-2027)						For-Sale Housing Gap Estimates (2022-2027)					
		Number of Units Needed by AMHI Level						Number of Units Needed by AMHI Level					
		≤ 50% AMHI	51%-80% AMHI	81%-120% AMHI	121%+ AMHI	Total Number of Units	Region's Share	≤ 50% AMHI	51%-80% AMHI	81%-120% AMHI	121%+ AMHI	Total Number of Units	Region's Share
Antrim	\$66,587	114	114	66	27	321	3.6%	265	239	504	442	1,450	6.5%
Benzie	\$62,022	129	50	26	9	214	2.4%	349	251	378	316	1,294	5.8%
Charlevoix	\$66,857	334	215	120	61	730	8.3%	173	282	648	525	1,628	7.3%
Emmet	\$67,354	380	226	115	144	865	9.8%	552	462	856	635	2,505	11.2%
Grand Traverse	\$69,310	2,358	733	288	190	3,569	40.5%	1,798	1,384	2,569	2,041	7,792	34.7%
Kalkaska	\$49,622	284	149	62	16	511	5.8%	353	220	313	271	1,157	5.2%
Leelanau	\$71,232	212	90	61	19	382	4.3%	498	383	581	491	1,953	8.7%
Manistee	\$59,828	262	142	87	34	525	6.0%	158	247	525	447	1,377	6.1%
Missaukee	\$50,381	179	99	45	13	336	3.8%	279	167	246	211	903	4.0%
Wexford	\$50,190	762	370	172	56	1,360	15.4%	639	454	705	598	2,396	10.7%
Region Total	Units	5,014	2,188	1,042	569	8,813	100.0%	5,064	4,089	7,325	5,977	22,455	100.0%
	Share	56.9%	24.8%	11.8%	6.5%	100.0%		22.6%	18.2%	32.6%	26.6%	100.0%	

WORKFORCE TALENT - CAPACITY, ATTRACTION AND RETENTION

The first significant spike in unemployment since the great recession occurred in 2020 (9.5%), due to the impact of the COVID-19 pandemic. Unemployment fell significantly in the years following through 2023, with a slight increase in 2024 (4.9%).

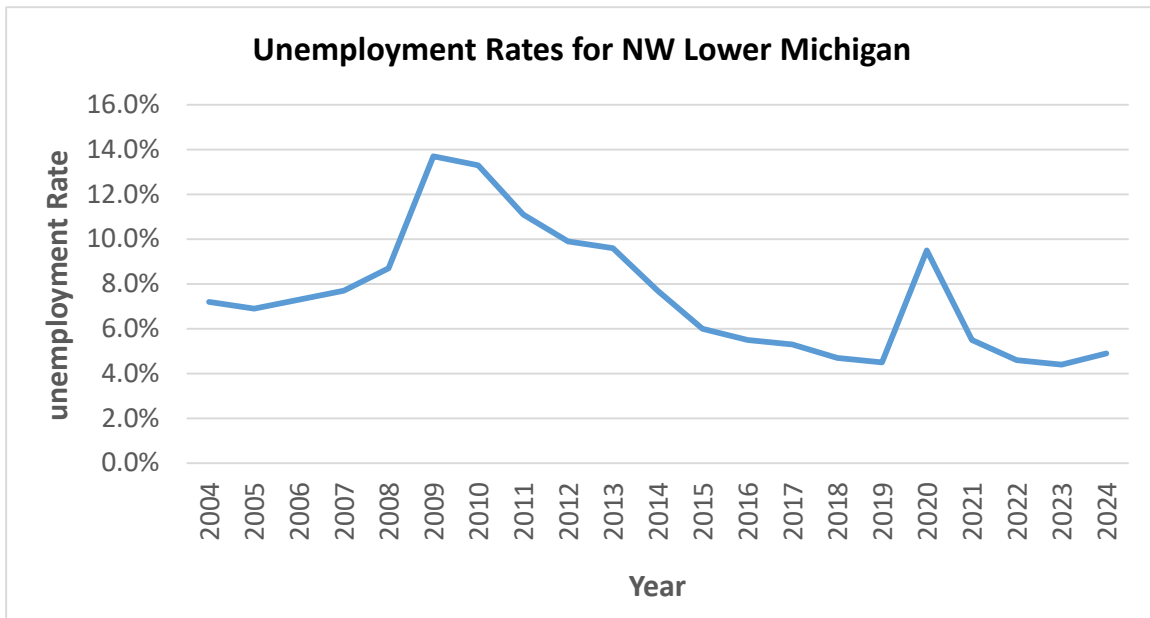


Figure 1: Unemployment Rates for Northwest Lower Michigan

The region's population aged 25 years or older has slightly higher level of post-secondary educational attainment, on average, compared to the state as a whole (Figure 2). Approximately 44% of the region's population (aged 25 years or older) an Associates Degree or higher, compared to 41.5% at the state level. 22.4% of the region's population has "Some College, No Degree" as their highest level of education, and 27.4% have achieved a high school diploma. While these estimates may fit with the overall distribution of projected job demand by educational attainment, it is not sufficient for high-wage, high-demand jobs. In addition, the category "Some College, No Degree" does not accurately reflect the shorter-term credentials, such as apprenticeships and trade certifications that may be held by local talent.

According to the [2024 Annual Planning Information and Workforce Analysis Report for the Northwest Michigan Region](#) by the Michigan Center for Data and Analytics, the region had roughly one-third of its population between ages 25 to 54. The region was older than the statewide average, with more individuals ages 55 and older.

The region's population increased by 5.2 percent between 2012 and 2022. This was a gain of 15,700 residents, showing a total population of 315,200. The growth rate in the Northwest area was the second highest of all Michigan Works! areas. However, this growth can primarily be attributed to people in retirement and near-retirement age groups (over age 55). The population under 19 years of age has continued to decrease, indicating continued future decreases of working-age populations.

Estimated Highest Educational Attainment of Population Aged 25 Years or Older

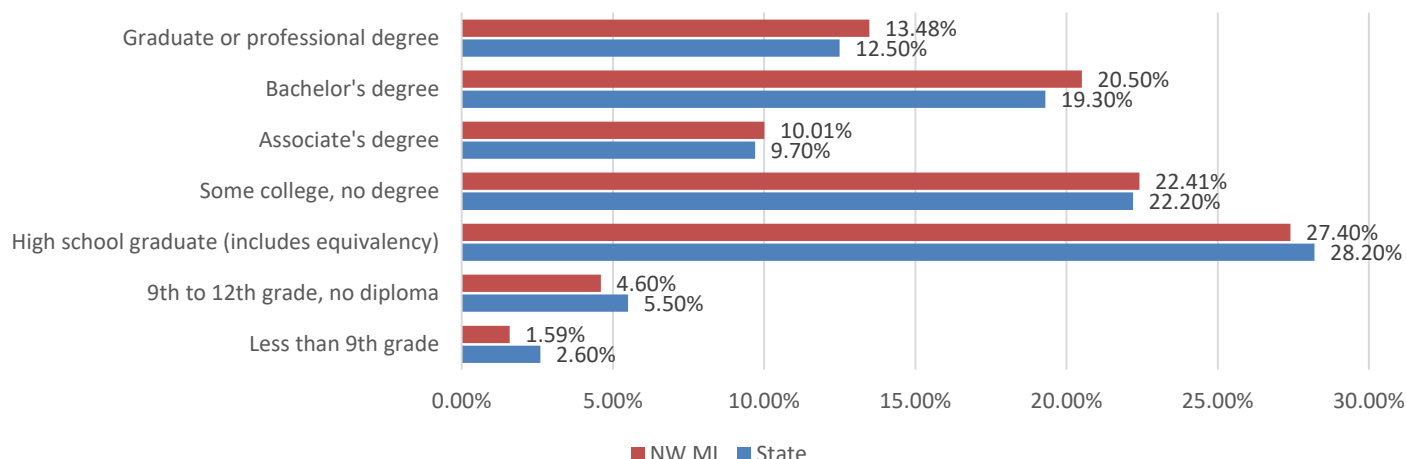


Figure 2: Estimated Highest Educational Attainment of Population Aged 25 Years or Older

CHILD CARE

[Networks Northwest's 2024 Regional Child Care Plan](#) states that the regional child care system continues to not have sufficient capacity to meet the needs of families with young children. It is estimated that the region needs full time care for roughly 2,600 young children (0-4 years old). The unmet need is greatest for infants and toddlers (0-2 years old). The most common barriers reported by parents and other caregivers are availability of care and cost of care.

Additionally, most regional employers report one or more impacts of the child care shortage include employees missing work, employees being distracted or reducing scheduled hours. Many regional employers also report employees who have left positions or turned down job or promotion offers because of child care issues. Statewide, Michigan's child care shortage costs the state economy \$2.9B annually in lost earnings, productivity and revenue.

The plan identified 14 identified solutions addressing one or more of the root causes of the child care provider shortage, achieving improvement in these areas: access to care when and where families need it, affordability so that families can afford to pay for care, and quality so that children are cared for in a safe, nurturing, and developmentally appropriate environment.

NATURAL HAZARD MITIGATION

Between 2021 and 2025, Networks Northwest assisted all ten counties and two of the three indigenous tribes in the region with completing updated natural hazard mitigation plans. A current, FEMA approved and locally adopted 5-year hazard mitigation plan is required by a community to apply for certain types of non-emergency disaster assistance grants offered by the Federal Emergency Management Agency (FEMA).

The plans include an analysis of the history and vulnerability of each county to multiple types of natural hazards, including public health emergencies (such as the COVID-19 pandemic) and invasive species. Each plan also contains mitigation strategies to address one or more type of hazard. Strategies can generally be grouped into the categories of: Communication, Coordination and Preparation; Infrastructure; Land Use Planning & Regulations; Public Health & Assistance; Natural Resources Management; and Wildfire Prevention. Each complete plan can be accessed at: [Networks Northwest Hazar Mitigation Website](#)

For almost all counties, the most frequently occurring natural hazard event is wildfire on state or federally-owned lands, followed by severe winter weather, thunderstorms/high winds, and hailstorms. Inland flooding concerns were expressed for every county, and many of the mitigation strategies address the need for improvement of dams, roads, and stormwater infrastructure. One example of a damaging flash flood event occurred in August 2021 in Antrim County, where Alden Highway (M-88) was completely washed out near Comfort Road.

Dams that have a “high hazard potential” rating (if the dam were to fail) are located in Antrim, Grand



Image 1: Alden Highway Washout, Antrim County, August 2021

Source: www.upnorthlive.com

Traverse, Leelanau, and Manistee counties. The counties with Lake Michigan shoreline (Emmet, Charlevoix, Antrim, Grand Traverse, Leelanau, Benzie and Manistee) have mitigation strategies to address the coastline erosion and flooding associated with fluctuating lake levels, which occurred between 2019 and 2021, and are expected to reoccur in the future. Other shoreline hazards include dangerous currents, waterspout, and seiche.

The spring 2025 ice storm is an example of a recent severe winter weather event of unprecedented



Image 2: Coastal Slope Failure Impacting the Little Traverse Wheelway, Emmet County, April 2020

Source: W.F. Baird & Associates Ltd.

scale that destroyed much of the power grid in Emmet county, and parts of Charlevoix and Antrim counties. The event resulted in a Governor-declared state of emergency. Many homeowners remained without power for several weeks in below-freezing temperatures and relied upon the services of community shelters. Forested areas suffered severe tree damage and many property owners incurred losses to their homes or businesses.

Additionally, wildfire is a particular natural hazard concern in parts of Wexford, Manistee, Kalkaska, and Grand Traverse counties, due to the concentrations of pine forest in those areas.



Image 3: Resort Pike Road in Petoskey, 2025 Ice Storm
Source: Provided By Kelsey Fettig www.petoskeynews.com

OUTDOOR RECREATION

Northwest Michigan offers a wide variety of outdoor recreation opportunities, with non-motorized and motorized trail systems, ski resorts, agritourism venues, parks, and plentiful lakes, streams, and forests. The [Outdoor Recreation Economic Impact Study](#) for Northwest Michigan (2024) indicates that the region has almost double the concentration of agriculture, forestry, fishing, and hunting employment than national averages for regions of similar size, as well as higher than average concentrations in manufacturing, construction, retail, and arts, entertainment, & recreation, indicating a strong, blue-collar base and foundation for Outdoor Economy employment. The Outdoor Economy employs an estimated 4,712 workers, or 3% of the labor force in the region and contributed 1.15 billion to Gross Regional Product in 2022. Furthermore, jobs in this sector grew by 9% over 10 years (2002 to 2022) within the region.

Survey responses of over 200 regional outdoor industry businesses revealed that the majority of outdoor recreation-based businesses in northwest Michigan are growing, and 96% reported their sales were increasing or stable. 72% reported they were planning on additional hiring in the next three years. By far, the biggest challenge experienced by these businesses is the lack of available talent and/or well-trained workforce.



Image 4: Farm - Antrim County
Source: Networks Northwest

The study listed the following key opportunities to pursue:

- Connect new and existing businesses to financial and technical assistance resources
- Facilitate professional networking for additional business-to-business sales
- Plan for growth in the shoulder seasons
- Support trail expansions and connections, targeting complementary small business development
- Market underutilized areas and welcome diverse visitors
- Educate communities about conservation and responsible use of outdoor assets
- Develop infrastructure to spur growth
- Steward the region's natural character and protect outdoor assets
- Focus on business attraction and growth in these sectors: marine services; bikes and e-bikes; ORV and SxS rentals; outfitters, guide, and transportation/shuttle services; and e-boating.

Also, while not an outdoor recreation issue in isolation, outdoor industry advocates should work with regional partners to ensure an adequate supply of workforce housing is available to support the local talent pool and the diverse businesses that make up the region's Outdoor Economy.

INFRASTRUCTURE

Infrastructure is the fundamental facilities and systems serving a country, state, county, township, or city and is necessary for its economy to function. Infrastructure includes roads, bridges, dams, rail systems, aviation, transit, water, sewer, and solid waste systems, energy, broadband, and educational facilities. Infrastructure is the foundation of our everyday lives and touches all parts of how we live, work and play in Michigan. It is the backbone of Michigan's economy.

Our transportation system (roads, bridges, transit, rail, etc.) allows Michiganders to travel to work every day, or up north for summer weekends by the lake. Water systems deliver drinking water to our homes, communities, and businesses. School buildings provide a safe place for our children to learn. Broadband service access promotes successful business activity, employment opportunities and remote learning. Sewer and treatment systems protect our neighborhoods from floods, and our lakes, rivers, and beaches from raw sewage, E. coli and other toxins.

Most of Michigan's infrastructure is old, outdated and in need of repair. In older Michigan cities, some systems date back to the late 1800s. For close to a decade now the state has suffered from a poor economy, resulting in Michigan under investing in infrastructure. However, recent investments have included \$3.5 billion in bond funding from the "Rebuilding Michigan Program" and \$4.7 billion from the "Building Michigan Together" plan. Michigan is also set to receive \$11 billion for much needed infrastructure projects through 2026 from the 2021 Bipartisan Infrastructure Law.

As of the 2020 U.S. Census, the Traverse City area reached the population threshold of 50,000 people required to become a metropolitan planning organization (MPO) – a status that provides an influx of more federal dollars for road projects and the ability for local governments and agencies to come together on one board to make regional transportation decisions. An MPO is charged by the federal government with overseeing regional transportation planning on a "3-C" basis: comprehensive, continuing, and cooperative. The MPO Policy Board works together to create a long-range transportation plan (LRTP), a document that outlines transportation projects 20 or more years out. That plan is updated every five years and has a required public participation component. The MPO also develops a short-term transportation improvement plan (TIP). That plan, which is approved by the governor, typically looks just four years out and is updated annually.

Much of the following summaries and data were retrieved from the [“2023 Report Card for Michigan’s Infrastructure”](#), prepared by the American Society of Civil Engineers, Michigan Section, as well as from the [Michigan Transportation Asset Management Council](#).

ROADS

The Michigan Transportation Asset Management Council (TAMC) tracks pavement condition on the state’s roadways under state and local jurisdiction. Their pavement condition forecasting system showed that statewide, for 2021, 25% of pavement was in good condition, with 45% in fair condition, and 33% in poor condition. That’s an improvement from 20% good in 2017 and reduction down from 40% poor in that same year.

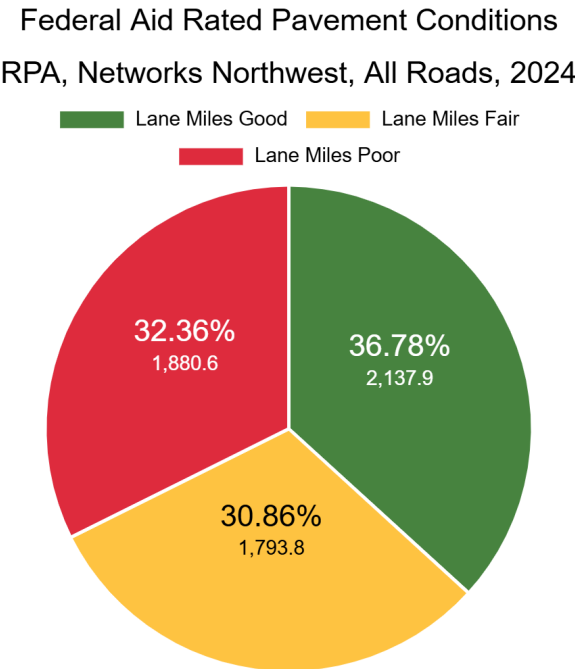


Figure 3: Federal Aid Rated Pavement Conditions for Northwest Region, 2024
Source: <https://www.mcgi.state.mi.us/mitrp/tamcDashboards>

Based on a 2024 assessment, 32.36% of Northern Michigan’s Federal Aid paved roads are rated in poor condition, 30.86% are rated in fair condition, and 36.78% are rated in good condition.

The state’s pavement tracking system estimates a continual decline in conditions between curbs using current funding models. Current dedicated funding, fee revenue, and estimated gas tax amounts show progress on pavement condition stalling and reversing. The percentage of paved roads in poor condition is fore-casted to rise from 33 percent in 2023 to 48 percent in 2033.

Governor Whitmer’s 2020 “Rebuilding Michigan Program” included \$3.5 billion of one-time bond financing, accelerating major highway projects on state Trunklines over a 4-year period. In November 2021, the President signed into law the Infrastructure Investment and Jobs Act (IIJA), aka Bipartisan Infrastructure Law. This federal legislation will provide Michigan approximately \$336 million more per year (2022-2026) than under the previous transportation bill (FAST Act). Unfortunately, inflation and supply issues are undermining most of the increase as dollars are not going as far for transportation improvements.

To erase decades of underinvestment and meet future needs, decision-makers should increase dedicated funding for roads, re-tool fee models, prioritize traffic safety, and improve resilience to worsening environmental threats.

Pavement Condition Forecast

2023-2033

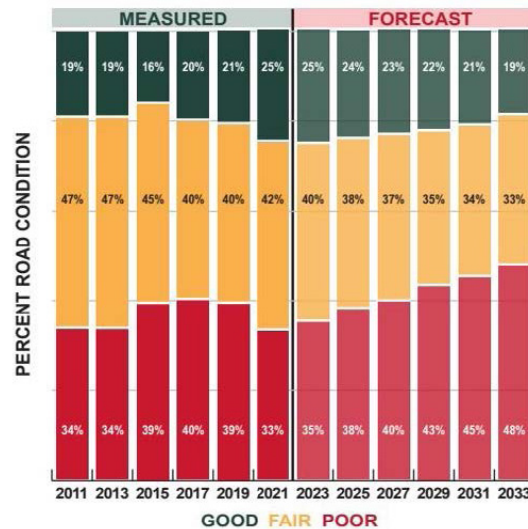


Figure 4: Federal Aid Rated Pavement Conditions for Northwest Region, 2024

Source: <https://infrastructurereportcard.org/state-item/michigan/>

BRIDGES

Michigan's over 11,000 bridges are critical connections in our surface transportation system, providing crossings over waterways, roads and railroads. A deteriorating and inadequate highway transportation system costs Michigan motorists billions of dollars every year in wasted time and fuel, injuries and fatalities caused by traffic crashes, as well as wear and tear on their vehicles. In 2022, 34% of Michigan bridges were in good condition – a drop from 43.5% in 2018. Deck areas in good condition dropped from 37.2% in 2018 to 28.9% in 2022. While fair condition bridges have stayed stable on count terms, 65.6% of bridge deck area is now in fair condition, compared to 55.4% in 2018. Poor condition bridges have held between 5% and 6% in the last four years, however they are disproportionate by ownership. 6% of MDOT-owned bridges and 14 percent of locally owned bridges were in poor condition in 2021.

Table 2: Bridges by Condition Rating in Northwest MI Counties, 2024

Source: <https://www.mcgi.state.mi.us/mitrp/tamcDashboards>

	Good	Fair	Poor	Severe
Total	40.42%	49.48%	6.27%	3.83%
	116	142	18	11
Antrim	7	6	2	0
Benzie	8	10	3	4
Charlevoix	6	9	1	1
Emmet	21	16	1	0
Grand Traverse	17	14	1	1
Kalkaska	6	7	0	1
Leelanau	3	4	0	0
Manistee	12	18	4	1
Missaukee	20	15	3	1
Wexford	16	43	3	2

The Bipartisan Infrastructure Law of 2021 will provide \$563 million to Michigan from FY 2022-2026 for bridge replacements, rehabilitations, and preservation programs in Michigan. These formula funds will allow state and local governments to move forward with numerous bridge projects. However, these funds will not be enough to address the decline in bridge condition shown above nor make significant ground on the backlog of bridge work.

Michigan's Mobility 2045 long-range transportation plan, published in 2021, placed annual bridge spending at \$157 million for state-owned structures and \$75 million for those locally owned. Raising Michigan bridges to its own performance would cost \$216 million more per year for state bridges and \$164 million for the local counterparts. That \$381 million total annual need sums to \$9.5 billion over Michigan's 25-year transportation planning window.

DAMS

Michigan's approximately 2,600 dams support water supply, flood control irrigation, hydro-power, economic development, and recreation. Approximately 75% of the state's dams are privately owned, with others owned by municipalities, public utilities, the state, or federal government. According to the National Inventory of Dams, there are 161 "high" hazard potential dams in the state. (Hazard potential is not an indication of the dam's condition, but an indication for the potential for loss of life and property damage if the dam were to fail.) Approximately 65% of those high hazard dams are rated as being in satisfactory condition; 19% as fair; 8% as poor; 6% as unrated; and 2% as unsatisfactory.

There are a total of 54 dams in the northwest Michigan region, with an average age of 94.3 years. A total of ten (10) of those dams are rated with a high hazard potential if they were to fail. (Table 3). The two high hazard potential dams in Manistee and Wexford counties are hydropower dams operated by Consumer's Energy (CE). The Federal Energy Regulatory Commission (FERC) operating licenses for these dams expire within the next decade. CE, as the owner and licensee, must file with the FERC a notice of intent to apply for a new license at least five years before the existing license expires. In 2022, CE began a detailed review of its river hydro operations to understand the financial, societal, and environmental impact of the three options available to them: pursue relicensing of the river hydros; decommission and remove the river hydros; or to sell the river hydros and transfer the licenses to a new buyer.

Table 3: Dams in Northwest Michigan Counties

Source: National Inventory of Dams - <https://nid.sec.usace.army.mil/#/>

County	High Hazard Potential Dams	All Dams	Average Age in Years
Antrim	Cedar River and Bellaire Dams	3	119
Benzie	-	5	68
Charlevoix	-	4	92
Emmet	-	6	74
Grand Traverse	Brown Bridge, Sabin and Union Street Dams	11	94
Kalkaska	Rugg Pond Dam	2	127
Leelenau	Meeuwenburg and Leland Dams	4	124
Manistee	Tippy Dam	5	95
Missaukee	-	5	77
Wexford	Hodenpyl Dam	9	73
Regional Totals	10	54	94.3

Michigan's dam safety program budget was increased after dam failures at Edenville and Sanford in 2020. But new resources are needed to improve the overall condition of dams across the state. The [Michigan 21st Century Infrastructure Commission Report \(2017\)](#) cited a need for \$225 million over the next 20 years to manage aging dams.

RAIL SYSTEMS

Michigan's rail system has approximately 4,000 miles of track, 84% of which is owned and operated by 27 private railroad companies, with the remainder owned by the Michigan Department of Transportation (MDOT). Rail is used to move 17% of freight in Michigan, transporting \$194 billion annually in agricultural products, chemicals, large equipment, and other commodities.

Three passenger rail services operate between Chicago and Michigan's cities, but the state is disconnected from high-ridership routes that connect Boston, New York, and Washington. Passage of the 2021 Bipartisan Infrastructure Law directed new funds, leveraged by state and private investment, for safety and service upgrades.

Active rail systems are located within eight of the ten counties in the region, connecting the communities of Petoskey, Boyne Falls, Mancelona, Kalkaska, Cadillac, Manton, Harrietta, Traverse City, Kingsley, McBain, and Manistee.

AVIATION

The region has two airports classified as "small non-hub airports" (Pellston Regional Airport and Cherry Capital Airport) and numerous "local basic" and "unclassified" airports throughout the region. The bulk of capital funding improvements to the aviation system are provided with federal Airport Improvement Program (AIP) funding through the Federal Aviation Administration (FAA). The conditions and overall safety of the aeronautical infrastructure has been well monitored and maintained through an asset management concept described in the Michigan Aviation System Plan.

TRANSIT SYSTEMS

While a majority of Michigan's residents have access to some form of public transportation, the reliability and availability of these services to many areas are inadequate, and some rural systems are unable to adequately meet transit demands. All ten counties in the region have some form of transit service through public transit agencies or specialized providers. Transit may be limited in some areas in both terms of the service area and/or the individuals served. Federal funds for rural services are awarded to Michigan and programmed by the Michigan Department of Transportation (MDOT).

Public Transit Agencies in Northwest Lower Michigan:

- Antrim County Transportation
- Bay Area Transportation Authority
- Benzie Bus
- Cadillac/Wexford Transit Authority
- Charlevoix County Transit
- Kalkaska Public Transit Authority
- Manistee County Transportation
- Straits Regional Ride (serves Emmet County)



Image 5: BATA - Traverse City
Source: Networks Northwest

DRINKING WATER

Most of the infrastructure within the State of Michigan's community water supply systems (CWS) are over 50 years old and a significant portion is approaching 100 years of service life. The state has an \$860 million to \$1.1 billion annual gap in water infrastructure needs compiled from decades of deferred maintenance and lack of knowledge on asset conditions. The Flint water crisis placed a national spotlight on the impacts of deteriorating infrastructure, fragmented decision-making, and severe underinvestment in water infrastructure. Many other Michigan CWS need critical infrastructure improvements. Drinking water upgrades have jump-started thanks to regulatory advancements on lead and copper, requirements for asset management planning, and recent influxes of funding for projects including replacement of over 27,000 lead service lines. Long-term, sustainable funding sources are needed to drive continued success.

All twelve (12) of the incorporated cities in the northwest Michigan region provide a CWS, as well as many of the incorporated villages and some townships.

STORM WATER SYSTEMS

Stormwater management systems in Michigan provide flood protection, impact water quality, improve agricultural production, and extend the service life of roads. Stormwater threats from intense weather are growing. Total annual precipitation has increased by approximately 14% in the Great Lakes Region since 1900, but the amount of precipitation falling in the heaviest 1% of storms has increased by 35% since 1951. There have been 7 federal disaster declarations in Michigan related to severe storms and dam breaks in the past 10 years. Both public and private storm sewer systems do not have the capacity to safely convey water from those extreme water events. Recent implementation of asset management programs identifies greater needs and regulatory constraints. County road commissions own 75% of Michigan roadways for example, but funding for their drainage systems is capped by the State Drain Code at only half of necessary stormwater investment needed.



Image 6: Suttons Bay Stormwater Improvement
Source: Networks Northwest

SOLID WASTE SYSTEMS

Overall, Michigan's collection, transfer and disposal infrastructure is robust, with approximately 26 years of landfill disposal capacity remaining. Municipal solid waste (MSW) disposed of in Michigan totaled approximately 17 million tons in 2021, a slight decline from previous years. Daily per capita waste generation is approximately 7.32 pounds, nearly double the national average. Michigan is beginning to actively shift its overall solid waste philosophy toward a sustainable materials management approach to create economic opportunities through waste diversion, beneficial reuse, and recycling programs.

The state's estimated residential recycling rate was 19% in 2021, up from 14% in 2016. While this is encouraging, the recycling rate is still much lower than the national average of 32%. Michigan is

aiming for a 30% recycling rate by 2030 and, since 2019, the number of households with available curbside recycling and drop-off sites has nearly doubled.

The State of Michigan has called for an update to local government’s Materials Management Plans (f.k.a. Solid Waste Plans) to be completed by July of 2027. The update is the result of amendments to Part 115, Solid Waste Management, of the Natural Resources and Environmental Protection Act, 1994 PA 451, as amended. The updated plans will focus on sustainable materials management, such as recycling and composting, instead of primarily disposal. The plans will also document existing and new infrastructure; define the needs, goals and opportunities for materials management and facilities; and apply criteria for the siting of all facilities, such as landfills, transfer stations, or composting facilities.

ENERGY

Michigan’s energy systems generally meet current needs. The status is threatened by increasing energy dependence and demand for high service reliability coupled with aging infrastructure, lack of investment to preserve function, exposure to physical and cyber threats, congestion, and dependence on externally sourced fossil and nuclear fuels. Continued renewal of infrastructure, hardening of communications, and innovative smart grid technology use are needed to limit outages and economic impacts. Improving grid-related outage statistics, avoiding pipeline-related failures, and overcoming regulatory/economic/policy barriers are critical to future system performance.

Natural gas utility service is limited in northern Michigan. The majority of the rural communities rely on individual propane fuel for heating, or another source such as electric, wood or geothermal. Table 4 lists the utility providers for electric and gas service in the region.

Table 4: Electric and Gas Utility Providers in Northwest Michigan
Source: MI Public Service Commission - <https://utilitysearch.apps.lara.state.mi.us/search>

Electric Utility	Gas Utility
Consumers Energy	DTE Energy
Cherryland Electric Co-op	Superior Energy Natural Gas
Great Lakes Energy Co-op	Consumers Energy
Cherryland Electric Co-op	Amerigas Eagle Propane
Presque Isle Electric & Gas Co-op	
Traverse City Power & Light	
City of Petoskey Municipal	
City of Harbor Springs Municipal	
Charlevoix Municipal	



Image 7: Traverse City Light and Power M-72 Solar
Source: Traverse City Light and Power

BROADBAND

Today, the success of a state has become dependent on how well it is connected to the global economy and how those connections are leveraged to improve the quality of life for its residents, the sustainability and growth of its businesses, the delivery of services by its institutions, and the overall economic development of its communities. Access to affordable broadband, or high-speed Internet, is a necessity in our professional, personal and social lives.

In 2021 Governor Gretchen Whitmer issued Executive Directive 2021-2 to establish the Michigan High-Speed Internet Office (MIHI) within the Michigan Department of Labor and Opportunity to coordinate investments made into broadband infrastructure and its utilization. In November 2021, MIHI released an [Update to the Michigan Broadband Roadmap](#).

The MIHI office provides the following insights into Michigan's broadband landscape:

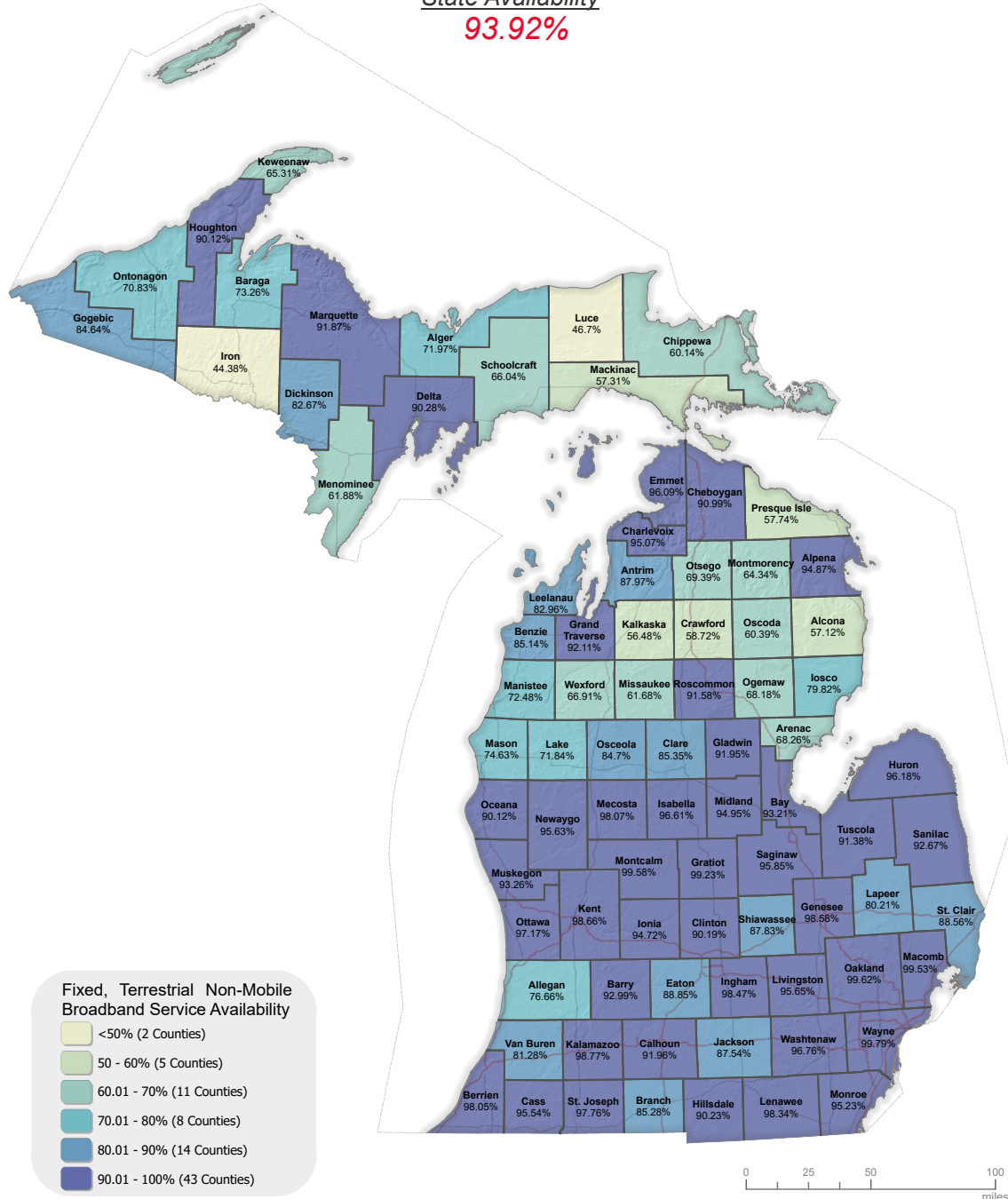
- Michigan has the 20th lowest broadband adoption rate among other states and territories. An estimated 1.24 million Michigan households struggle with Internet connectivity and are on the wrong side of the Digital Divide.
- The COVID-19 pandemic accelerated tele-working, and that is not expected to slow down. It is estimated that 56% of the U.S. workforce holds a job that is compatible (at least partially) with remote work, and 25-30% of the workforce will be working from home one or more days per week after the pandemic. Lack of broadband impairs residential and commercial development in many areas of Michigan, including those that have typically been defined as "vacation" properties, tourist destinations, and other smaller rural areas and towns.
- Having broadband provides households with an estimated \$1,850 annual economic benefit.
- Statewide, teleworkers save \$363 million in car maintenance and fuel annually
- Broadband access can increase home values by an average of 3.1 percent
- Tele-medicine adds an estimated \$522,000 to rural economics and reduces hospitalizations
- It is estimated that one percentage point increase in broadband access could create or save about 12,000 jobs statewide
- Small businesses with websites have higher annual revenue than those without
- In a study of manufacturers, 40% stated they were able to add new customers and 57% realized cost savings because of their broadband connections.

The following map shows the estimated availability of basic broadband (as of 2023). The service availability varies across the northwest Michigan region, with Emmet, Charlevoix and Grand Traverse counties having the most service availability, and Kalkaska, Missaukee and Wexford counties having the least.

Michigan Fixed Broadband Service Availability by County

25 Mbps Download/3 Mbps Upload

State Availability
93.92%



Broadband data displayed on this map are developed from a combination of direct provider outreach and data collection, FCC broadband deployment filings, outside plant field audit projects, resident feedback, and independent research conducted by Connected Nation Michigan.

Statistics on broadband availability also use residential location data based on classifications from the FCC Fabric Version 3. Classified as either Residential or Mixed. Fabric location data provided by CostQuest Associates, Inc., all rights reserved.

Published October 6, 2023

The current FCC definition of broadband is a minimum speed of 25 Mbps (Megabits per second) download and 3 Mbps upload.

This map is not a guarantee of internet service availability. Mobile and satellite services may also be available.

Please submit feedback regarding any possible mapping inaccuracies at <https://connectednation.org/michigan/feedback>.

Figure 5: Map of Fixed Broadband Service Availability by County in Michigan
Source: <https://connectednation.org/statewide-impacts/connected-nation-michigan>

EDUCATION FACILITIES

The condition of Michigan's K-12 education facilities varies widely both across the state, and within individual regions and districts. Michigan's schools maintain adequate overall capacity, although suburban schools in areas experiencing the heaviest population housing pressure, have been expanding. Based on the statewide declining enrollment of students, the capacity of Michigan schools will continue to be generally adequate. As the population of Michigan remains stable, school enrollment projections are largely predicted by the birth rates in the state. Based on an analysis of birth rates for the last 20 years, the rate of births appears to continue to slowly decline in Michigan, mirroring national trends.

Overall, these institutions have made progress in rightsizing for leveling off enrollment and infrastructure investment shows positive trends. The state spent almost \$2 billion on school capital expenditures during the 2020-21 school year, up from \$1.7 billion and \$1.4 billion in the previous two years. Per pupil facility spending in Michigan now roughly equals the national average of \$1,376 per pupil, but much of recent investment comes from one-time increases that expired in 2024. Decision makers should direct predictable, dedicated infrastructure spending to schools, especially because the state is home to many buildings constructed 50+ years ago. Select systems at school facilities have seen upgrades to preserve functionality, but layouts often don't reflect the teaching needs of 21st century learners.

Northwest Lower Michigan hosts two community college campuses: Northwestern Michigan College in Traverse City and North Central Michigan College in Petoskey. While Northwestern Michigan College partners with Central Michigan University, Ferris State University, Davenport University and Davenport University to offer various services and programs, the region lacks its own four-year university.

Organizations in Northwest Lower Michigan offer a multitude of trade education opportunities across multiple industries to high school to adult aged residents. Organizations such as the colleges above and Career and Technical Education programs hosted by school districts offer the opportunity for trade education in careers such as electrician, welders, and nursing assistants among others. Further opportunities are provided through Northwest Michigan Works! Apprenticeships that upskills employees and recruits new talent to fill gaps and Adult Education that provides educational opportunities for all adults.

Image 8: Wexford-Missaukee Career Technical Center Sign
Source: Wexford-Missaukee Career Technical Center



REGIONAL ECONOMIC ANALYSIS OF NORTHWEST LOWER MICHIGAN

LOCATION QUOTIENTS

The measure of the local concentration of industry and occupation against the national average provides a location quotient (LQ) score, with scores of 1 or greater having a higher concentration of that industry and occupation. LQ measures employment (i.e. jobs) by industry concentration in an area, and is not a measure of people’s employment. It is important to note that a high LQ score doesn’t directly translate to the largest employer by employee count for an area. Other industries with lower LQ scores may display greater employment, but those industries would have less concentration in the area as compared to nationally.

Analysis of LQ scores allows planners, economic developers, and policy makers to gain an understanding of the industry make-up of an area through identification of over-saturation of certain industries and also through emerging or growing industries. Diversification of industries and industry employment is a fundamental objective, which supports employment resiliency through variation of the employment market.

TOP 5 INDUSTRIES BY AVERAGE EMPLOYMENT LOCATION QUOTIENTS

ANTRIM COUNTY	BENZIE COUNTY
1. Crop Production 2. Machinery Manufacturing 3. Beverage and Tobacco Product Manufacturing 4. Accommodation 5. Amusement, Gambling, and Recreation Industries	1. Animal Production and Aquaculture 2. Accommodation 3. Waste Management and Remediation Services 4. Gasoline Stations and Fuel Dealers 5. Food manufacturing
2020 to 2024 changes: Reordering of industries by LQ and the former top 5 category of 'Unclassified' was replaced by 'Amusement, gambling, and recreation industries' Largest Employers outside of the Top 5 Industries by LQ are: 'Food Services and Drinking Places' and 'Food and Beverage Retailers' displaying that these service and retail oriented businesses support a significant portion of employment opportunities.	2020 to 2024 changes: Reordering of industries by LQ and the former top 5 categories of 'Building materials & Garden Supply Stores' and 'Amusements, Gambling and Recreation' were replaced with 'Animal production and aquaculture' and 'Waste Management and remediation services' Largest Employers outside of the Top 5 Industries by LQ are: 'Food Services and Drinking Places' and 'Specialty Trade Contractors' displaying that food and drinking establishments support substantial service oriented employment positions and skilled trades and contractors make up a large portion of employment.

CHARLEVOIX COUNTY

1. Plastics and Rubber Products Manufacturing
2. Accommodation
3. Utilities
4. Machinery Manufacturing
5. Computer and Electronic Product Manufacturing

2020 to 2024 changes:

Reordering of industries by LQ and the former top 5 category of 'Amusements, gambling and Recreation' was replaced with 'Machinery Manufacturing'

Largest Employers outside of the Top 5 Industries by LQ are:

'Food Services and Drinking Places' and 'Nursing and Residential Care Facilities' display that service oriented positions and those of the healthcare services field support significant employment positions.

EMMET COUNTY

1. Accommodation
2. Beverage and Tobacco Product Manufacturing
3. Building Material and Garden Equipment and Supplies Dealers
4. Construction of Buildings
5. Amusement, Gambling, and Recreation Industries

2020 to 2024 changes:

Reordering of industries by LQ, the top 5 categories remain unchanged from 2020.

Largest Employers outside of the Top 5 Industries by LQ are:

'Food Services and Drinking Places' and 'Ambulatory Health Care Services' display that service oriented positions and those of the healthcare services field support significant employment positions.

GRAND TRAVERSE COUNTY

1. Textile Product Mills
2. Beverage and Tobacco Product Manufacturing
3. Unclassified
4. Building Material and Garden Equipment Supplies Dealers
5. Machinery Manufacturing

2020 to 2024 changes:

Reordering of industries by LQ and the former top 5 category of 'Furniture & Home Furnishings' was replaced with the 'Unclassified' category.

Largest Employers outside of the Top 5 Industries by LQ are:

'Food Services and Drinking Places' and 'Ambulatory Health Care Services' display that service oriented positions and those of the healthcare services field support significant employment positions.

KALKASKA COUNTY

1. Crop Production
2. Heavy and Civil Engineering Construction
3. Fabricated Metal Product Manufacturing
4. Forestry and Logging
5. Specialty Trade Contractors

2020 to 2024 changes:

Reordering of industries by LQ and the former top 5 category of 'Gasoline Stations' and 'Unclassified' were replaced with 'Forestry and Logging' and 'Specialty Trade Contractors' categories.

Largest Employers outside of the Top 5 Industries by LQ are:

'Food Services and Drinking Places' and 'Food and Beverage Retailers' displaying that these service and retail oriented businesses support a significant portion of employment opportunities.

LEELANAU COUNTY	MANISTEE COUNTY
1. Beverage and Tobacco Product Manufacturing 2. Crop Production 3. Unclassified 4. Museums, Historical Sites, and Similar Institutions 5. Construction of Buildings <u>2020 to 2024 changes:</u> Reordering of industries by LQ and the former top 5 category of 'Miscellaneous Store Retailers' was replaced with 'Museums, Historical Sites, and Similar Institutions' category. <u>Largest Employers outside of the Top 5 Industries by LQ are:</u> 'Food Services and Drinking Places' and 'Food and Beverage Retailers' displaying that these service and retail oriented businesses support a significant portion of employment opportunities.	1. Accommodation 2. Beverage and Tobacco Product Manufacturing 3. Building Material and Garden Equipment and Supplies Dealers 4. Construction of Buildings 5. Amusement, Gambling, and Recreation Industries <u>2020 to 2024 changes:</u> Reordering of industries by LQ, the top 5 categories remain unchanged from 2020. <u>Largest Employers outside of the Top 5 Industries by LQ are:</u> 'Food Services and Drinking Places' and 'Ambulatory Health Care Services' display that service oriented positions and those of the healthcare services field support significant employment positions.
MISSAUKEE COUNTY	WEXFORD COUNTY
1. Animal Production and Aquaculture 2. Forestry and Logging 3. Support Activities for Agriculture and Forestry 4. Wood Product Manufacturing 5. Crop Production <u>2020 to 2024 changes:</u> Reordering of industries by LQ and the former top 5 categories of 'Truck Transportation' and 'Gasoline Stations' were replaced with 'Crop Production' and 'Support Activities for Agriculture and Forestry'. <u>Largest Employers outside of the Top 5 Industries by LQ are:</u> 'General Merchandise Retailers' and 'Nursing and Residential Care Facilities' displays that service sector positions provide significant employment opportunities.	1. Forestry and Logging 2. Plastics and Rubber Products Manufacturing 3. Transportation Equipment Manufacturing 4. Couriers and Messengers 5. Fabricated Metal Product Manufacturing <u>2020 to 2024 changes:</u> Reordering of industries by LQ and the former top 5 category of 'Truck Transportation' was replaced with 'Couriers and Messengers'. <u>Largest Employers outside of the Top 5 Industries by LQ are:</u> 'Food Services and Drinking Places' and 'General Merchandise Retailers' displaying the service and retail sector positions provide significant employment opportunities.

ECONOMIC DEPENDENCY RATIO

Economic Dependency Ratio (EDR) is the measure of 'non-workers' relative to the number of employed individuals in a geographic area. The ratio compares non-workers for every 100 workers, and includes all members of the population who are not employed, excluding prisoners and service members. A score less than 100 indicates that the ratio weighs towards the workforce being greater than the identified dependent. Therefore a higher ratio indicates that there is a greater burden on working age population with more dependents who are not engaged in the workforce. Counties which have higher ratios, and also display low percentages of youthful age cohorts, with an aging population, can estimate that burden will likely increase on the working age population. Burden is defined as constrained financial support for educational facilities, community facilities, and community resources which are largely supported by the working population. Each county's Economic Dependency Ratio is displayed on Figure 6.

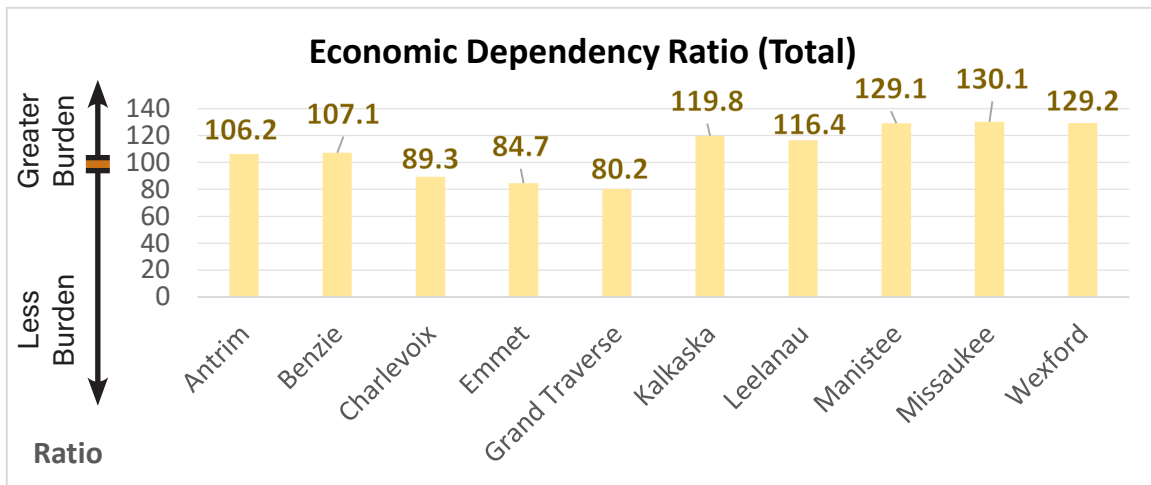


Figure 6: Economic Dependency Ratio By County

HOUSING AFFORDABILITY INDEX

The Housing Affordability Index measures the financial ability of a typical household to purchase an existing home in an area. An index of 100 indicates that on average an area has a sufficient median household income to afford a home. As one moves below an index of 100, this displays that housing is less affordable. For example an index of 75 would mean that a household would need to earn 25% more to afford the median priced home, while an index of 125 displays that a household would be able to afford a home that is listed at 25% more than the median home prices. Each counties Housing Affordability Index is displayed on Figure 7.

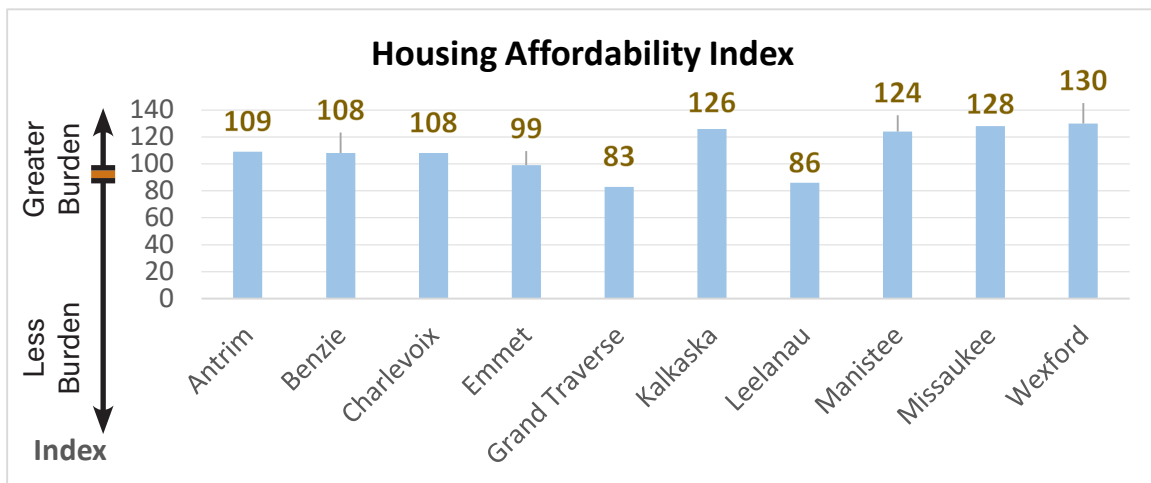


Figure 7: Housing Affordability Index By County

WEALTH INDEX

Wealth Index is the measure of the standard of living and financial stability in an area's households rather than one's 'worth.' Wealth is the accumulation of resources, physical possessions & property, or large amounts of money. Wealth is what remains once a householder's earning power has faded. An index of 100 displays an area's wealth is on par with the national average, an index below 100 displays an area's lower than average wealth. The wealth index taken into consideration with the percentage of the working population and the age cohorts which comprise the working age population provides information on the status of the community. A large wealth index of greater than 100 is a clear indicator of a population's high financial/asset worth. An index below 100 displays a population has less wealth, if a significant portion of the population is still of working age, and age cohorts display that the working population has years left of earning potential; a lower index may not be as troublesome as the population has time and earning power to increase wealth. An older population, which is less engaged in the workforce coupled with a low Wealth Index could be concerning for the status of the community. Each County's Wealth Index is displayed on Figure 8.

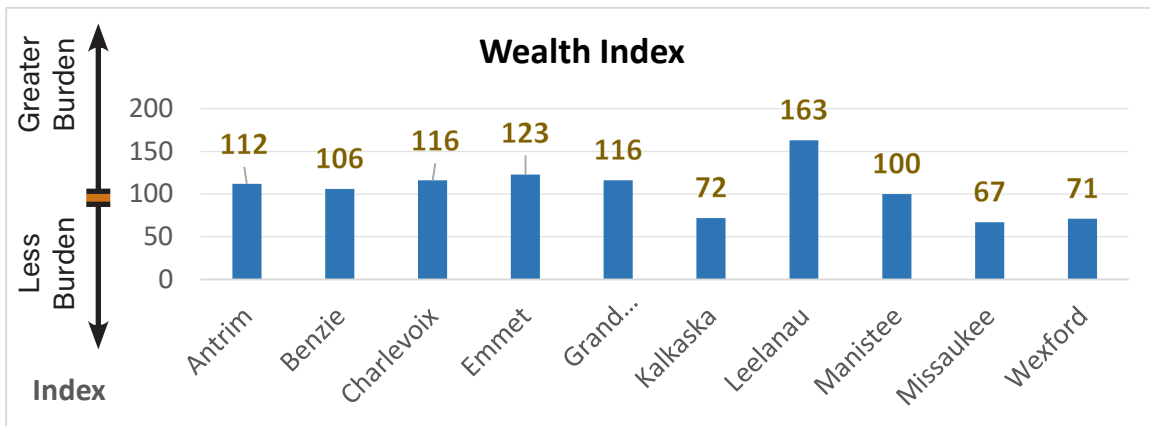


Figure 8: Wealth Index By County

PERCENT OF INCOME FOR MORTGAGE

The rate of percent of income allocated for a mortgage displays the impact of a home mortgage on a home buyer's monthly budget. Lower percentages of income allocated to mortgages are extremely beneficial to households and families due to the constraints placed on budgets by other expenses such as transportation, childcare, food and clothing and other necessary costs. The 28% rule states that a home buyer's monthly mortgage should not exceed 28% of their monthly income, and is often stated as the 28/36 rule which concludes that overall debt payment doesn't exceed 36% of a monthly median income which includes mortgage expense. All but two counties in the region have percentages less than 28%. Each County's Percent of Income for Mortgage is displayed on Figure 9.

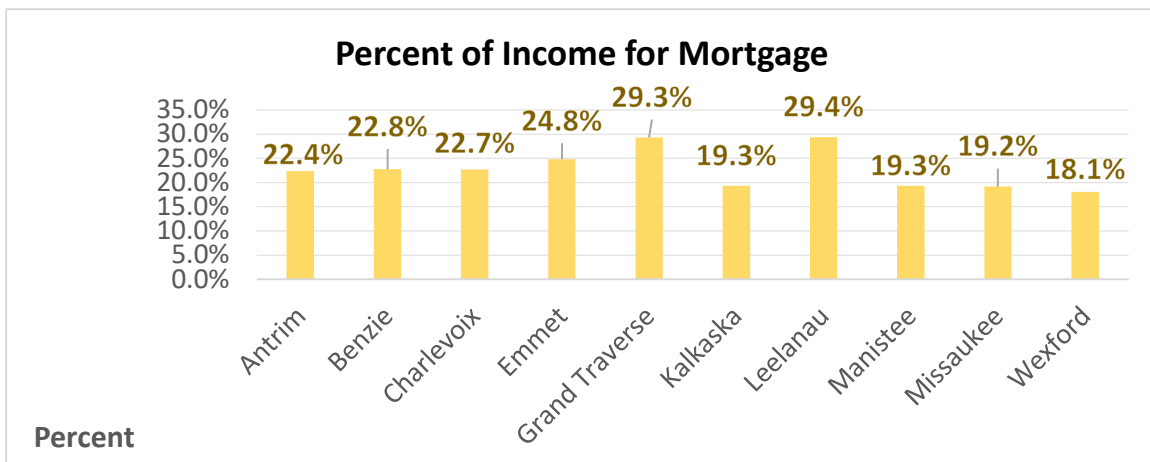


Figure 9: Percentage of Income for Mortgage By County

TASK FORCE - SWOT ANALYSIS

REGIONAL TASK FORCE MEMBERS

Networks Northwest staff contacted known organizations to represent the geographic and industry range of the region. The Regional Task Force members are listed below, with their organization, and industry representation.

Table 5: Regional Task Force Members

Industry or Sector Representation	Name	Organization
Hospitality	Jacqueline Holm	Traverse City Pitspitters
Retail	Sarah Christensen	Oryana
Education (High and Grammer School)	Jessie Houghton	TCAPS
Infrastructure (Water/Sewer)	Jim MacQuarrie	Mancelona Area Water & Sewer Authority
Broadband	Tim Maylone	Cherry Capital Connection
County Government	Ben Townsend	Wexford County
Tribal Government	Rob Kalbfleisch	GT Band
Healthcare	Joanne Schroeder	Munson Health Care - Charlevoix
Transportation	Heidi Phaneuf	MDOT
Transportation (MPO)	Barry Hicks	TTCI MPO
Childcare	Sherwood Smith	
Planning and Zoning	Tammy Doernenburg	Emmet County
State Government	Eric Cline	MI Dept. of Treasury
Agriculture	Josh Stoltz	Grow Benzie
Construction	Lisa Leedy	Builders Exchange of MI
Manufacturing	Ryan Schultz	M R Products/Mr Chain
Technology and Research	Keri Ammolte	20Fathoms
Non-profit Sector	Gina Aranki	Child and Family Services of NW MI
Talent & Workforce	Lisa Schut	NWMI Michigan Works!
Education (College/Trade School)	Jason Slade	Northwestern Michigan College
Entertainment and Arts	Matthew Ross	Botanical Gardens TC
Realtor	Connor Miller	Aspire North
Public Transit	Eric Linguar	BATA
Energy (Renewable and Fossil Fuel Based)	Shannon Beery	Cherryland Electric Coop
Climate & Environment	Josh Shields	Manistee Conservation District
Climate & Environment	Sarna Salzman	SEEDS
Recreation and Trails	Julie Clark	TART
Housing	Shelly Charron	Housing North
Local Government	Beth Friend	East Bay Township
United Way	Seth Johnson	United Way
Philanthropy	Dave Mengebeier - Steve Wade	GT Regional Community Foundation

Economic Development Organization Representation	
Name	Organization
Warren Call	Traverse Connect
Carmen Kott	Manistee Area Chamber of Commerce
Payton Heins	Northern Lakes Economic Alliance
Nikki Schultz	Alliance for Economic Success (AES)
Jessie Mitchell	Michigan Economic Development Corporation (MEDC)

PROCESS AND METHODOLOGY

The first CEDS Regional Task Force meeting was held on October 3, 2024. At this meeting, the Task Force members reviewed the 2021 CEDS Goals and Objectives and discussed regional projects with members. Due to Northern Michigan weather interfering with in-person meeting scheduling for the second meeting, Community Development staff organized a SWOT Analysis Survey with 31 of the members responding to the survey.

The responses from the SWOT Analysis Survey were analyzed by Community Development staff and developed into statements representing the various interests of the region. The statements were then reviewed and commented on by the Task Force members at their second meeting held on February 20, 2025.

SWOT ANALYSIS

Below are the statements on strengths, weaknesses, opportunities, and threats, as well as the Internal Identity and External Identity.

STRENGTHS

The region's economic strengths lie in its high quality of life, driven by abundant natural resources and recreational opportunities, which attract both residents and tourists. A thriving hospitality and tourism sector complements this, while a collaborative environment fosters strong partnerships between public and private entities, educational institutions, and economic development organizations. This collaboration supports a talented and educated workforce, including remote workers and tech professionals, and contributes to a growing and diversifying economy with a strong manufacturing base. Effective economic development leadership further enhances these strengths, focusing on strategic planning and stakeholder engagement. These strengths also include the food and farming industry, a regional workforce that punches above its weight class due to the boomerang effect for family or retirement and natural resources, and arts and culture.

WEAKNESSES

The region's economic development is hampered by a significant housing crisis, characterized by a lack of affordable options (not just cost, but housing options), particularly for young families and lower-income residents, which deters talent attraction and strains existing residents. Workforce challenges include an aging population, limited skilled tradespeople, wage stagnation relative to housing costs, and seasonal income fluctuation further restrict growth. A lack of industry diversification, especially in the tech sector, coupled with limited career paths and a risk-averse culture, hinders innovation and economic expansion. Coordination and planning gaps, particularly among municipalities, prevent effective regional strategies and resource allocation. Geographic isolation is still a challenge, and there is an aging and lack of infrastructure, specifically multi-modal transportation options that strain roadways. Other weaknesses include limited funding for economic development initiatives, childcare shortages, a high cost of living, declining natural capital,

digital literacy gaps within the workforce, layers of bureaucracy, funding restrictions, capacity, coordination and planning gaps among road commissions, a lack of incentives or legislation to build collaboration, state legislation silos, and state control of funding mechanisms. This can lead to partners leaving the table or moving further apart, a feeling of competition for funding, and turnover of staff in organizations, which leads to rebuilding.

OPPORTUNITIES

The region has significant economic development opportunities, particularly in strengthening collaboration and partnerships between public, private, and educational institutions to address key challenges like the housing crisis and workforce development. Focusing on skills training in high-demand trades and manufacturing, expanding apprenticeships, and developing comprehensive housing strategies are crucial. Leveraging the region's natural beauty and desirability, while preserving it, can attract talent and businesses. Continued investment in broadband internet, dedicated economic development personnel, and placemaking (including creating placemaking in pockets such as Kingsley and Interlochen, which requires funding, and creating places where people want to live and bring businesses) along with embracing sustainable practices and modernizing governance models, will further enhance the region's appeal and competitiveness. Building on recent economic development successes and supporting remote work trends will solidify the region's position for future growth. Opportunities also include preserving unique rural communities through thoughtful design of development, recognizing that remote workers look for natural beauty and a small-town feel but want city amenities (higher density housing), developing corridors for unified prosperity, intentional development rather than reacting to what comes, addressing missing infrastructure (multi-modal, water, and sewer, including the lack of growth boundaries for water and sewer, which helps with growth and rate-setting best practices), opportunities to invest, zoning reform for housing, political will and the will of the people. Changes in technology, making it easy to share data and create images to display what could be, and a philanthropic older population that will invest in "good things" are also opportunities. The region is also seen as a climate refuge spot due to its fresh water and nice woods, with climate resilience attracting people.

THREATS

A critical threat is the high cost of living, particularly housing, driven by a lack of affordable options, which makes attracting and retaining a workforce difficult. This is compounded by outdated zoning, resistance to denser development, and stagnant wages. Climate change poses another significant challenge, impacting winter tourism, agriculture, and infrastructure. A lack of regional collaboration and political divisions impede effective planning and problem-solving. Reduced funding, particularly compared to urban areas, and a lack of childcare resources further strain the region. Ineffective planning, resistance to change (which leads to stagnation without economic development, and requires adaptation at a faster pace than desired), and an over-reliance on a few industries create additional vulnerabilities. Apathy to get involved, smaller populations of young people in communities, and hostile environments are also threats, along with time commitment from younger ages to be proactive, get involved, and learn how things operate. Finally, while in-migration brings some benefits, it also creates conflict and pressure on infrastructure, highlighting the need to ensure local residents benefit from this growth. Underlying all these challenges is the degradation of natural resources, which threatens the long-term health of the regional economy. Other threats include the privatization of spaces without accommodating public spaces and amenities, losing neighborhood feels in neighborhoods (with people visiting more than living), the risk of losing schools due to a lack of kids, a transient population that takes away from community investment (less likely to be engaged, no kids in school system), the distinction between a second home and a short-term rental, homes being shifted from residential to investment, the growing permanent population vs. transient population, aging (though outpacing the state with workforce ages in the region), losing knowledge

from retirements or moving on, and health and wellness challenges including behavioral health, mental wellness, and the capacity of physical and mental health systems.

EXTERNAL IDENTITY

Northwest Michigan's external identity is strongly tied to its natural beauty and recreational opportunities. It's viewed as a "paradise" and a premier vacation destination, known for its charming small towns, wineries/breweries, beaches, outdoor activities, and overall relaxed atmosphere. The region is also recognized as the cherry capital and a top spot for craft beverages. While seen as a beautiful place to visit, live, and retire, it's also perceived as rural. Traverse City, in particular, is considered a charming town with a strong arts and culture scene, local food culture, and abundant water resources, making it a popular location for weddings and other celebrations. However, the region's increasing cost of living is also becoming part of its external image. There is an overlap between residents and visitors, and the "Traverse City" identity could be expanded to the "Grand Traverse Region" with a focus on agritourism and the region's small towns. Food and farming and the overall safety of communities also contribute to the external identity.

INTERNAL IDENTITY

Residents see the region as having "something special" that they are protective of, recognizing its natural beauty and unique character. There's a sense of community, with many viewing it as a place to come back to, and a spirit of collaboration and innovation. There is an awareness of the region's challenges, including a divide between the "haves" and "have-nots" (wealth gap/income disparity not just in Grand Traverse County), the struggle to diversify the economy while preserving the "small town feel", and the tension between growth and nostalgia. Many recognize the importance of tourism but also acknowledge its impact on the community. The region is seen as a small metropolitan area striving to educate its workforce and provide opportunities for its youth. The region's beauty and recreational opportunities are highly valued, but there's a concern about maintaining them through sustainable growth that benefits all residents. There's also a sense of the region being "good enough" while acknowledging challenges like seasonal employment, limited career opportunities, and affordability issues. Some perceive a lack of collaboration and a focus on individualistic opportunities rather than collective action. There is a true community feel, and it is an open, welcoming, and kind region with a social service network.

ECONOMIC DEVELOPMENT STRATEGIES

The following economic development strategies were crafted through the CEDS Regional Task Force Members and Community Development staff efforts. They offer descriptions of the Region's economic development interests.

EDUCATION AND TRAINING

Up-skilling and re-skilling programs, focusing on both hard and soft skills, along with job search assistance are critical. A critical need exists for more skilled tradespeople, requiring not only increased training opportunities but also a cultural shift to value and promote these professions. Expanded access to and improved quality of post-secondary education, including more 4-year degree options and stronger university partnerships, are needed, along with a consideration of how much the community values 4-year education. Skills-based training, whether through college programs focused on in-demand careers or trade schools emphasizing practical skills, is important. Developing creative thinking and team-building skills is also important. Effective coordination and visionary leadership are needed to develop and implement these programs, ensuring jobs with livable wages that allow residents to afford to live in the region. There is also a need for more exposure to career tech centers for younger students, beyond just juniors. Education and training should also aim to give confidence to start a business/initiative/etc., rather than just getting a job.

INFRASTRUCTURE NEEDS

Reliable broadband and cell coverage are essential for modern life and economic development. Transportation improvements, including expanded public transit options and better road maintenance, are needed to address congestion and reduce car dependence. The housing crisis requires urgent attention, with a need for more affordable options that are linked to adequate water and sewer infrastructure. Upgrades and expansion of water and sewer systems, especially in rural areas, and addressing limitations with wells and septic systems are crucial. Expanding natural gas service and investing in nature-based infrastructure for climate resilience are also important considerations. Finally, targeted industrial infrastructure development and the creation of commercial centers outside of the main city center can support economic growth and reduce traffic congestion. The transportation network needs attention, and land use/zoning, particularly sprawl, is not helping. Development within existing urban growth boundaries (LUGs), water quality issues with septic systems, and adequate and affordable infrastructure are also key. Collaboration between local units of government (LUGs) on infrastructure and access to technical expertise are vital.

HOUSING

Incentives for affordable housing development through tax breaks, expedited permitting, and employer-led initiatives can encourage the creation of more affordable units. Increasing housing density by allowing multi-family housing over just duplexes in single-family zones and promoting infill development in key corridors can also expand housing options. Removing barriers to a diversity of home types due to construction costs and focusing on all levels of affordability, not just low-income housing, are important. Addressing affordability requires ensuring that "affordable housing" is truly accessible to those with lower incomes and exploring strategies like regional housing taxes on short-term rentals to mitigate inventory loss, rephrasing "regulating short-term rentals" to be less demanding. Utilizing existing programs and revolving loan funds to support infrastructure development for affordable housing projects can further reduce developer costs. Finally, zoning reform, increasing the availability of skilled trades workers, providing low-interest loans for developers, improving infrastructure, and regulating short-term rentals are all crucial

components of a comprehensive housing strategy. Different stages of life housing, focusing on for-sale properties not just rentals, considering the costs of expanding infrastructure, and prioritizing the homeless population to be more feasible to house with built-in support systems and multi-modal transportation networks are also important.

TRANSPORTATION

Expanding and enhancing public transportation, both within towns and connecting surrounding areas, is crucial for commuters and residents. For freight, exploring rail connections and a shared distribution center for smaller businesses can improve efficiency. Road improvements should prioritize enhancing existing infrastructure rather than simply building more roads, with a focus on prioritizing maintenance of existing and future infrastructure. Continued investment in and expansion of non-motorized transportation options like bike paths and sidewalks are essential. Supporting direct air service expansion and considering a regional infrastructure tax on tourism-related activities could provide funding for these improvements. Addressing transportation needs, such as extended sidewalks along major routes and bus service options, is also important. Finally, fostering a cultural shift towards greater use of shared transportation methods will be increasingly necessary as the region grows and road infrastructure faces greater strain. The intersection of placemaking with transportation, cutting some of the redundancy, safety of the transportation network, and collaboration with local, state, and federal funding sources are also key considerations.

EMERGING INDUSTRY AND TECHNOLOGY

Blue technology, driven by the Freshwater Research and Innovation Center, is a prominent area of growth. A promising technology sector includes companies focused on energy efficiency and green solutions. The natural resources field is diversifying, with increasing emphasis on climate science and its integration into management strategies. Other emerging areas include aerospace/defense, boat manufacturing, fintech, outdoor recreation, remote work, insurance, healthcare, and potentially pharmaceutical research. Within the housing industry, 3D-printed homes offer a potential solution to the housing crisis. Finally, artificial intelligence and automation are also mentioned as emerging technologies, specifically AI relating to agriculture for crop management, field management, and pesticide use, as well as technology to extract more from natural gas wells (ag-tech).

TALENT ATTRACTION AND RETENTION

Increasing the availability of affordable housing and childcare options is paramount, especially for families. Offering competitive wages and benefits that reflect the high cost of living is essential. Actively attracting new industries to the region can create more job opportunities and draw in talent. Enhancing community characteristics that appeal to families, such as quality schools and desirable amenities, can also play a role. Providing accessible training and continuing education opportunities within the region is crucial for workforce development. Expanding retail options can improve quality of life. Significantly increasing the housing supply is essential, as attracting more talent without addressing the housing shortage will only exacerbate affordability issues and hinder long-term retention of local residents. Fostering the authenticity of communities and preserving natural character and resources are also important.

TOURISM AND HOSPITALITY

Targeted marketing efforts, such as a Northern Michigan-focused "Pure Michigan" campaign or promoting the region within the Midwest, can reach specific audiences. Supporting experiential tourism by developing year-round attractions and activities can broaden the region's appeal. Promoting sustainable tourism practices and educating visitors about preserving natural resources

is crucial for long-term viability. Enhancing the visitor experience through hospitality training and improved way-finding technology can encourage repeat visits. Allowing limited short-term rentals for permanent residents could provide more lodging options without significantly impacting housing supply. Finally, a more deliberate approach to promotion, considering the region's desired characteristics and ensuring alignment with zoning and other activities, can help manage growth and preserve what makes the region special. This includes promoting remote work, agriculture, and the business climate, and considering what type of tourism to promote, such as drinking culture, and its potential for talent attraction.

NATURAL ENVIRONMENT AND RESOURCES

The region's natural environment and resources are fundamental to its economy, serving as the cornerstone of its tourism industry and significantly impacting quality of life. These resources attract visitors and encourage people to relocate, driving economic activity. Preservation and protection of these assets, including water views, natural areas, and recreational opportunities, are crucial for continued economic success. Balancing resource utilization with environmental protection is essential, ensuring that development is concentrated to preserve farmland, wild spaces, and water quality. The natural environment is also seen as fragile, requiring careful management to avoid destroying the very qualities that attract people to the region. Prioritizing the natural environment in decision-making and recognizing its importance to the regional identity is key. Balancing resource utilization is necessary to allow for growth.

PARTNERSHIPS

Encouraging rather than establishing formal collaborative bodies can provide structured platforms for interaction and joint initiatives, avoiding duplication of services. Creating funding opportunities that require collaboration can incentivize partnership formation and resource sharing. Improving communication and awareness between sectors through enhanced information sharing and educational programs is crucial for mutual understanding. Actively incentivizing collaboration through funding requirements and showcasing success stories can further motivate partnership development. Cross-promotion between organizations can increase visibility and collaborative opportunities. Ensuring inclusive stakeholder engagement in discussions on relevant issues brings diverse perspectives to the table. Continued support for existing connector organizations and investing in relationship building, especially for under-resourced stakeholders, are essential for long-term collaboration. Finally, while some believe the region is already strong in collaboration, actively maintaining this open culture and addressing divisive forces that hinder progress are vital for continued success.

ECONOMIC DEVELOPMENT SUPPORT EFFORTS

Efforts undertaken by Economic Development Organizations in Northwest Lower Michigan are underway that provide opportunities for support of economic development efforts. These efforts can be classified in three primary categories:

1. Data and supporting information that direct and focus efforts by identifying trends and benchmarked success in specific sectors.
2. Inventorying of properties, corridors and infrastructure that can be marketed as development areas and opportunities.
3. Marketing Platforms that share information in a single location to perspective job seekers, employers and developers.

GROWTH AND INVESTMENT AREAS

To identify communities within Northwest Michigan that are prepared for new development, a community asset inventory was conducted by Networks Northwest in 2010 in conjunction with the Growth and Investment Network. The survey collected responses from cities, incorporated and unincorporated villages, townships, and planned growth areas in Northwest Michigan. Survey results were used to develop criteria for selecting areas from the region that were best positioned to accommodate future growth patterns anticipated for Northwest Michigan over the next 25 years. While many assets are needed for new growth and investment, there are five essential criteria common to communities throughout the nation that support growth and investment potential. These five criteria were used in the selection of areas for additional analysis regarding growth and investment readiness, trends, and capabilities:

- Operational municipal water system
- Operational municipal sewer system
- Adopted master plan that recommends a defined higher density downtown core for development and investment
- Zoning ordinance that codifies higher density development in the downtown core
- Available governmental officials and staff to create effective growth- and investment-oriented policies and efficiently process requests and permits

OPPORTUNITY ZONES & MARKETING PACKAGES

Created under the 2017 Tax Cuts and Jobs Act, are a federal economic development tool focused on improving the outcomes of communities across the country, especially in areas that have suffered from disinvestment over many years. Opportunity Zones are designated low-income census tracts where tax incentives are available to groups or individuals who invest in an Opportunity Fund and hold their capital gains in Opportunity Zone-related assets or property. There are Opportunity Zones in eight of the ten counties in the northwest region of Michigan. By investing in Opportunity Zones, investors stand to gain a temporary deferral on their capital gains taxes if they hold their investments for at least five years and a permanent exclusion from a tax on capital gains from the Opportunity Zones investments if the investments are held for ten years. For more information on Opportunity Zones go to <https://miopportunityzones.com/>.

There are eight opportunity zones located within our Northwest Michigan region. The opportunity zones are currently each being included in a marketing packet that once assembled will outline the

availability of development incentives for their specific geographic areas. Of importance to note, is the necessity to establish an Opportunity Fund. The Opportunity Fund once established sets the stage for use of these opportunity zones.

STATEBOOK DATA API INTEGRATION WITH NETWORKS NORTHWEST WEBSITE

StateBook provides trusted, sourced data to improve location analysis. The data allows you to compare locations to identify the most strategic opportunities for investment, confirm project viability, and mitigate risk across disparate data sources, multiple geography levels and over time.

A contract has been established with StateBook through Networks Northwest for the development of a data Application Programming Interface (API), which will directly integrate the navigable and customizable user interface into the Networks Northwest website. End users have been familiar with existing data API platforms that have been in use with the website for years. The newly integrated data API from Statebook will now expand the types of data available. It will:

- Allow for customizable data for specific geographies and time-frames.
- Allow the end user to place multiple types of data and time-frames in graphs, tables, charts and maps.
- Allow the end user to download the raw data or any of the representative data figures (i.e. graphs, tables, charts, maps).
- Allow Networks Northwest to benchmark the data series against other data series and years directly on the website.

REMOTE WORKER STUDY

Following the pandemic and the required remote work options that many businesses and organizations undertook, the return to 'office' work for many companies also included allowances for remote work to remain an option for some employees and businesses. The status of remote is unknown for our region, and having an accurate understanding of the complexities of remote work is desired for inclusion in economic development efforts. A Remote Worker Study commenced in early 2025 by Networks Northwest was built around a methodology which includes direct questionnaire and focus group facilitation of remote workers from across the ten county region, while also navigating and summarizing existing remote worker research conducted within the State of Michigan and nationally to identify similar trends locally. Additionally the study estimates remote workers by industry for each county of the region utilizing statistical proportionate modeling from national studies compared against data at our local county level. The study is set to be complete by the end of 2025.

STRATEGIC SITE READINESS PROGRAM (SSRP)

Networks Northwest (NN) initiated an SSRP process in late 2024, with the majority of the process occurring during the calendar year of 2025. The process was multi-faceted, with financial support made available to local Economic Development Organizations of the Lower NW Michigan Region for activities in support of identification of sites for being made development ready. A separate set of tasks for the process was undertaken by the NN Community Development team. These separate tasks sought to perform 3 distinct functions: 1) Create a narrative of the system status and service boundary map for every publicly held drinking water and sanitary sewer system in the 10 county region. 2) Create a development site 'Hindrance Feature' GIS layer which identifies areas we should avoid for development consisting of steep slopes, wetlands, riparian corridors and water bodies, locations of critical dunes, high risk erosion areas, and the location of prime, unique and locally significant farmland soils. 3) Utilizing County GIS Parcel data, isolation of vacant parcels which

are within or adjacent to infrastructure service areas and categorizing the vacant parcels by size, property classification, road frontage and value we can directly identify potential development sites for use by local EDOs and units of government.

DIGITAL COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

Networks Northwest received approval from the Economic Development Administration (EDA) for the use of a Digital CEDS platform. This platform augments the hard copy regional CEDS report. The augmentation is particularly useful as it creates dynamic dataset API integration into the CEDS report, allowing the reader to adjust data inputs and view the most up-to-date and relevant information as it pertains to a County's socio-economic profile. This effort will lead our CEDS development into a next generation of interactive and up-to-date data integration.

CHILDCARE PLAN IMPLEMENTATION EFFORTS

Regional Partners and Networks Northwest have continued to support Childcare Implementation Efforts through maintaining and convening of the NW Regional Childcare Coalition. The coalition is focused on meeting the strategies of the "Regional Childcare Plan, 2024". Support efforts from the Networks Northwest Community Development Department continue in the space of childcare implementation, through direct response to community requests for policy and regulatory revisions assistance at the local government level, and also through discussions of focused efforts for identification of structures to support the siting of future childcare facilities in the communities which were identified as those with greatest need.

LOCAL UNIT CAPACITY PLANNING AND ECONOMIC DEVELOPMENT PROCESS SUPPORT

The Networks Northwest Community Development Team continues to support local planning process efforts throughout the 10 NW Lower Michigan Region. We have provided capacity and expertise for a range of processes including local unit Master Plans, Recreation Plans, Downtown Development Authority Plans, Capital Improvement Plans, and Economic Development Strategies. We will continue to offer our knowledge and expertise to assist local units of government and partner organizations with pursuance of grant funding and administration, planning processes, and project implementation efforts.

EVALUATION FRAMEWORK

A best laid plan is only as successful as the implementation that occurs under the direction of the plan goals. Implementation can only truly be achieved if the plan has a component for measuring the success of the implementation efforts. The following information will guide region's stakeholders as we implement the plan and measure the success of that implementation.

MEASURING SUCCESS

Measuring successful implementation efforts is outlined to follow a multi-pronged approach through this framework. The utilization of communication through meeting discussions, the monitoring of data and utilization of integrated data platforms, and efforts in economic development support activities will all play a part in determining how successful we as a region are with these implementation efforts.

It is important to note that efforts are not always immediately successful. There will be some objectives that may need to be approached differently, necessitating revision of the idea to define a different method of approach. These types of revisions should be met with conscious realization that although success was not achieved, much was learned regarding approach, so the effort was not a failure.

MEETINGS & COMMUNICATION

The establishment of prioritized goals and ranked objectives by the Task Force Members, with responsible parties and time-frames set for each, provides the first avenue toward measuring success. The Regional and County Level Task Force Groups are encouraged to continue to convene through the coming years. Discussions at these meetings will surely include various subjects, but one theme that should carry from this CEDS forward is a discussion of the short-term goals and what steps have been taken by responsible parties in meeting the objectives under those goals.

As a group, Task Force Members and the organizations they represent should advise on adjustments to objectives if a certain approach is not successful. They should also offer to lend expertise or direct assistance if they are able and familiar with an approach that may be useful. Continuation of and participation at Task Force meetings will outline successes and difficulties with implementation efforts allowing for the first measuring of success.

BENCHMARKING TRENDS

County Info-graphic Sheets data displays figures on population, employment, median income, poverty rates, and individual industry sub-sectors growth or decline among several other datasets. Trend lines were added to each graph and percent change for the most recent years of data in the tables was calculated. The establishment of this data over a time-frame of almost fifteen years allows for benchmarking of the data.

As the CEDS is updated periodically, additional years of data (as available) should be included in the graphs and tables. Inclusion of this data will allow for new trend lines to be placed and for percent change columns to be updated. Monitoring of the adjustment of trend lines and percent change provides a good method of measuring success against specific data categories.

The use of the new StateBook API integrated into our website will provide an opportunity to establish the benchmarks to the most recent data. As datasets are updated they will be included in the platform, allowing for almost immediate updating of the trends.

ESTABLISHMENT OF NEW GOALS AND/OR ADJUSTMENT OF TIME-FRAMES

Lastly, an obvious measurement of success stems from the completion of objectives that leads to the necessity to establish new goals and/or adjustment of objectives and time-frames. These measures of success will stem from meeting and communicating, but are separated as they will move beyond the need for revision of an objective or identifying a different approach to meeting success.

As goals and objectives are met, they should be cataloged in an appendix in order to track through future revisions for a true understanding of how the region has embraced the CEDS and the implementation of the goals and objectives.

REGIONAL ECONOMIC RESILIENCE

A region's ability to prevent, have foresight for and weather an economic disruption is a pathway to regional economic resilience. Economic resilience is defined by the EDA as the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid a shock all together.

ECONOMIC DISRUPTION (RESILIENCY)

A key strategy is diversifying the regional economy to avoid over-reliance on any single sector. Building strong collaborative networks and communication systems, including a universal referral system, is essential for navigating crises and accessing resources. Leveraging data analytics, forecasting, and learning from other regions can help anticipate and adapt to potential disruptions. Investing in organizational redundancy, emergency preparedness, and the overall health of the regional economy strengthens resilience. Proactive planning, including pre-disaster recovery plans (like FEMA planning for mitigation for stormwater) and ongoing monitoring of business needs, is crucial for effective response. A long-term vision that invests in future generations and fosters a collaborative, solution-oriented community will further enhance the region's ability to weather economic uncertainties.

STEADY-STATE INITIATIVES

Northwest Lower Michigan has on-going efforts that meet the definition of Steady-State Initiatives. These initiatives are long-term efforts that position the region to tackle economic disruptions:

- Engaged in CEDS Process: Local EDO's and stakeholders are actively engaged in the CEDS development and update process. The Action Items developed through consensus are borne of the Summary Background, SWOT Analysis and achieve a strategic direction.
- Focus on Innovation Clusters: Local EDO's and economic development support organizations are actively working to focus industry clusters that will seek to support and develop innovation.
- Support for Business Incubators: Local EDO's and economic development support organizations are actively incubating and recruiting businesses for the region, building upon strong industrial sectors in our counties.
- Maintain data availability (API & GIS): Networks Northwest, local units of government and non-profits are working to maintain GIS data within established databases for use by development community, business leaders and residents. Networks Northwest is continually maintaining an integrated data API and expanding data resources as new sources become available.