

COMMUNITY SATISFACTION STUDY  
REPORT ON RESIDENT & BUSINESS SURVEYS

PREPARED FOR THE  
CITY OF LAKE FOREST



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## INTRODUCTION

Located in the heart of South Orange County and the beautiful Saddleback Valley, the City of Lake Forest has been carefully managed to make it an ideal place for businesses to prosper and for people to live, work, and play. Incorporated in 1991, the City's team of full-time and part-time employees provides a full suite of services through nine Departments—City Attorney, City Manager, Community Services, Development Services, Finance, Management Services, Police Services, Public Works, and Economic Development/Community Preservation.

As part of its commitment to provide high quality services and responsive local governance, the City of Lake Forest engages its residents and businesses on a daily basis and receives regular feedback on issue, policy, and performance matters. Although these informal feedback mechanisms are valuable sources of information for the City in that they provide timely and accurate information about the opinions of specific constituents and customers, they do not necessarily provide an accurate picture of the community as a whole. Informal feedback mechanisms typically rely on the customer to initiate the feedback, which creates a self-selection bias. The City receives feedback from only those individuals motivated enough to initiate the feedback process. Because these individuals tend to be either *very* pleased or *very* displeased regarding a particular topic, their collective opinions are not necessarily representative of the City's resident and business populations as a whole.

**PURPOSE OF STUDY** The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and thereby provide the City with a *statistically reliable* understanding of the community's satisfaction, priorities, and concerns as they relate to services and facilities provided by the City of Lake Forest. Ultimately, the survey results and analyses presented in this report will provide Council and staff with information that can be used to make sound, strategic decisions in a variety of areas, including service improvements and enhancements, measuring and tracking internal performance, budgeting, policy, and planning.

To assist in this effort, the City selected True North Research to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Identify key issues of concern for residents and businesses.
- Measure overall satisfaction with the City's efforts to provide municipal services.
- Measure the importance of *specific* services to residents and businesses, as well as their satisfaction with the City's efforts to provide each service.
- Determine the effectiveness of the City's communication efforts.
- Profile opinions regarding potential capital improvements and policy-related matters.
- Collect additional background and demographic data relevant to understanding the perceptions, needs, and interests of residents and businesses.

This study is not the first statistically reliable resident and business ‘satisfaction’ study conducted for the City. Similar studies have been conducted every two years since 1998. Because of the interest in tracking the City’s performance in meeting the evolving needs of its residents and businesses, where appropriate the results of the current study are compared with the results of identical questions used in the prior surveys.

**METHODOLOGICAL CHANGES & COMPARISONS TO PRIOR STUDIES** In recent years, much has changed in terms of how the public receives information, the accessibility of residents through traditional recruiting methods, and their willingness to participate in community surveys. In addition to an increase in the proportion of households that have abandoned their land lines and only use unpublished cell phones, the prevalence of caller ID and similar technologies has led to a substantial rise in call screening behaviors—where individuals will not answer the phone unless they recognize the incoming phone number. In combination, these factors create a situation where a growing percentage of households are simply unreachable if one relies solely on telephone-based sampling, recruiting, and data collection techniques.

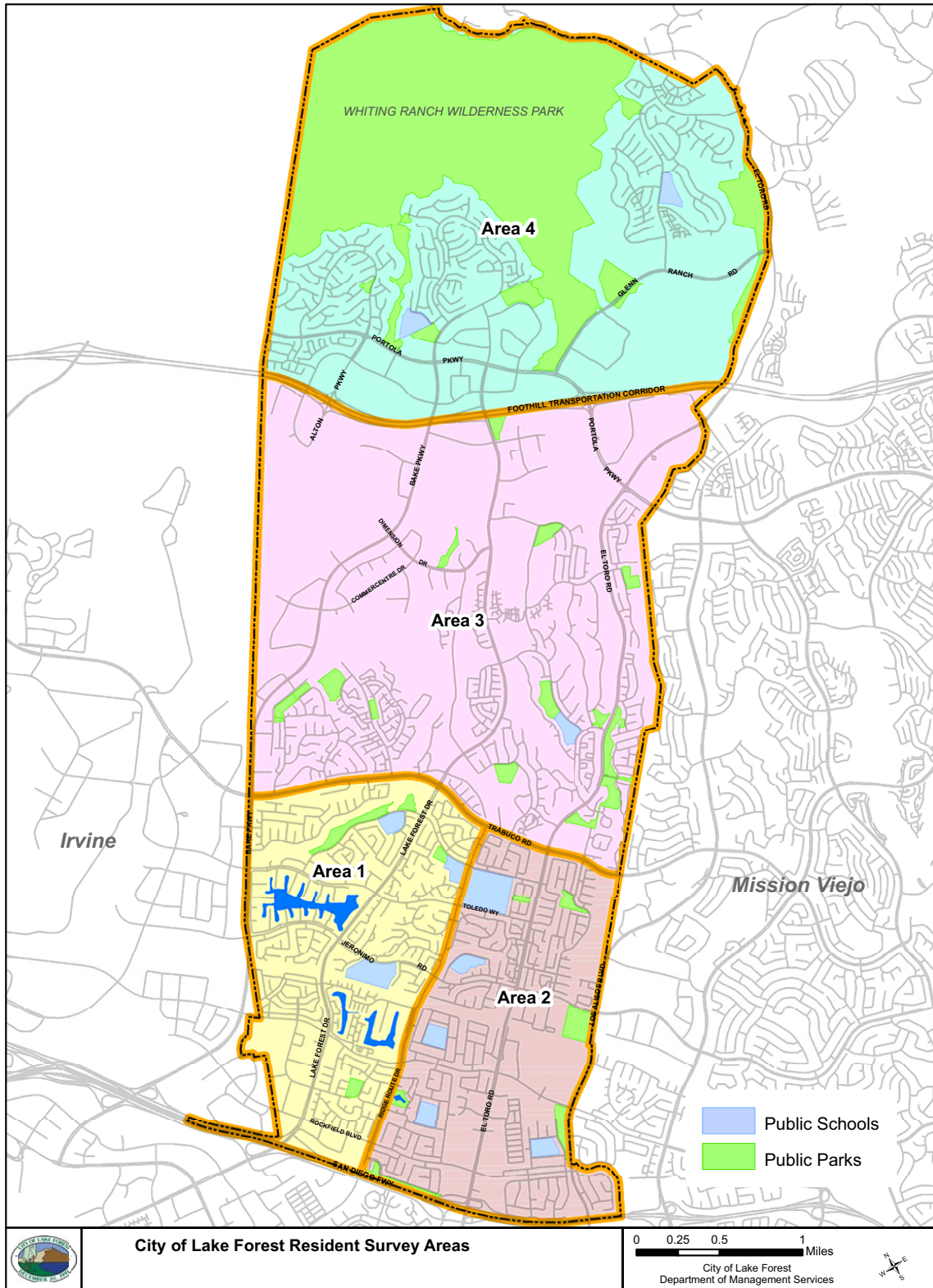
Recognizing the aforementioned developments and the challenges they pose to producing statistically reliable results, True North recommended that the City of Lake Forest transition to a mixed-methodology design for the 2016 survey that utilized multiple recruiting methods (telephone and email) as well as multiple data collection methods (telephone and online). This mixed-method approach had been used in past years for the survey of local businesses, but was new for the resident survey this cycle. Although transitioning to this new methodology improves the overall reliability and comparability of the City’s resident survey moving forward, it does create a methodological break in the time series of studies. For this reason, although comparisons between the 2016 and 2014 surveys are provided in this report, it’s important to keep in mind that a difference in the survey results this cycle could be caused by a change in public opinion, be an artifact of a change in the methodology, or a mixture of both. In many respects (and for the reasons outlined above), the 2016 survey represents a new baseline study.



**STATISTICAL SIGNIFICANCE** With the above caveat noted, the reader will find that many of the figures and tables in this report present the results of questions asked in 2016 alongside the results found in the prior surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify statistically significant changes between the 2014 and 2016 surveys. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2016.

**OVERVIEW OF METHODOLOGY** A full description of the methodology used for this study is included later in this report (see *Methodology* on page 72). In brief, a total of 704 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between November 29 and December 14, 2016. Survey participants were categorized into one of four geographic areas according to the location of their residence (see Figure 1 on the next page). The resident interviews averaged 22 minutes in length. The 18-minute survey of businesses was administered to a stratified random sample of 200 local business owners and managers between December 5, 2016 and January 12, 2017. Data collection was suspended for the Christmas and New Year’s holidays.

FIGURE 1 MAP OF LAKE FOREST STUDY AREA



**ORGANIZATION OF REPORT** This report is designed to meet the needs of readers who prefer a summary of the findings as well as those interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the surveys by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaires used in the study are contained at the back of this report, and a complete set of crosstabulations for the resident and business surveys are contained in Appendix A and Appendix B, respectively.

**ACKNOWLEDGEMENTS** True North thanks the staff at the City of Lake Forest who contributed their valuable input during the design stage of this study. Their collective experience, local knowledge, and insight improved the overall quality of the research presented here.

**DISCLAIMER** The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the City of Lake Forest. Any errors and omissions are the responsibility of the authors.

**ABOUT TRUE NORTH** True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,000 survey research studies for public agencies, including more than 350 studies for California municipalities and special districts.



## JUST THE FACTS

The following is an outline of the main factual findings from the 2016 study. For the reader's convenience, the findings are organized according to the section titles used in the body of this report. Thus, to learn more about a particular finding and how it may compare to findings from prior surveys, simply turn to the appropriate report section.

### GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

- The vast majority of respondents shared favorable opinions of the quality of life in Lake Forest, with 39% reporting it is excellent and 52% stating it is good. Seven percent (7%) of residents indicated the quality of life in the City is fair, whereas 2% used poor or very poor to describe quality of life in the City.
- When businesses were asked to rate the business climate in Lake Forest compared with surrounding areas, 33% reported that it is excellent, 46% said it is good, and 17% offered that it is fair. Only 4% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is poor or very poor.
- When asked to indicate one thing city government could change to improve Lake Forest, one-quarter (26%) of residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (14%) or desired no changes from the City (12%). Of the specific suggestions, the most common were reducing traffic congestion (12%), limiting growth and development (11%), cleaning up/improving/rebuilding deteriorating areas of the City (8%), and improving public safety (6%).
- When asked about what the City could do to improve the business climate in Lake Forest, more than half of business managers surveyed were either unsure of a change that could be made (39%) or indicated that no changes were needed (23%). Specific suggestions for improving the business climate included having fewer restrictions/regulations (6%), increasing business networking opportunities (6%), and reducing signage restrictions (4%).
- Nearly half (48%) of local businesses stated that there were no particular features of Lake Forest that benefit their business or that they could not think of any at the time of the interview. Among specific aspects mentioned, having a convenient, easily-accessible location within the City (16%), not having to navigate/pay for a business license/ease of startup (8%), Lake Forest's sense of community (7%), and access to roads, freeways, and surrounding communities (6%) were mentioned most often.
- Nearly eight-in-ten business managers surveyed (78%) said they could not think of any challenges associated with doing business in Lake Forest. The most common specific challenges cited were too many regulations (4%), undocumented immigrant issues (4%), and traffic/parking issues (3%).
- More than eight-in-ten residents (81%) and local businesses (87%) surveyed said that, overall, they were satisfied with the City's efforts to provide municipal services.

### SPECIFIC SERVICES: RESIDENT SURVEY

- Among the services provided by the **Police**, residents rated maintaining a low crime rate as the most important service (95% extremely or very important), followed by investigating criminal activity (93%) and preparing for emergencies (84%). Residents were most satisfied with the Department's efforts to provide crossing guards near schools (92% very or somewhat satisfied), maintain a low crime rate (89%), and provide child safety programs (88%).

- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service provided by the Department (65%), followed by enforcing zoning regulations (60%), issuing building permits (58%), and enforcing sign regulations (48%). Satisfaction ratings assigned to the four development services ranged from a low of 73% for enforcing zoning regulations to a high of 85% for inspecting buildings.
- Of the residents surveyed, just 12% had applied for a building permit, received a building inspection, requested code enforcement, or used any other service offered by the Development Services Department in the 12 months prior to the survey.
- Among the services provided by the **Public Works Department**, maintaining local streets and roads was viewed as the most important service (94%), followed by providing garbage collection services (90%) and reducing traffic congestion (88%). Residents were most satisfied with the Department's efforts to provide garbage collection services (93%), maintain trees (91%), provide street sweeping services (90%), maintain parks and picnic areas (90%), and maintain public landscapes (89%).
- Among the services provided by the **Community Services Department**, residents assigned the highest importance to providing recreation programs for special needs children (70%), followed by providing recreation and sports programs for teens (67%), providing special events like concerts in the park and the Fourth of July Parade (62%), and providing recreation and sports programs for elementary school-aged children (59%). Residents expressed the highest levels of satisfaction with the Department's efforts to provide special events like concerts in the park and the Fourth of July Parade (91%), recreation and sports programs for elementary school-aged children (91%), and after school recreation programs (89%).

## SPECIFIC SERVICES: BUSINESS SURVEY

- Among **general city services** provided by the City to local businesses, participants in the business survey rated maintaining a low crime rate as the most important of the services tested (94% extremely or very important), followed by investigating criminal activity (84%), promoting economic development (72%), and revitalizing outdated areas in the City (65%). At the top of the satisfaction scale was providing building permit services (95%), followed by enforcing traffic laws (94%), maintaining a low crime rate (93%), and investigating criminal activity (93%).
- Among the **infrastructure-related services** provided by the City to local businesses, members of the business community rated maintaining local streets and roads as most important (83%), followed closely by reducing traffic congestion (77%). The other four services—landscaping median strips and other areas of the City (59%), street sweeping (59%), enforcing zoning regulations (51%), and enforcing sign regulations (48%)— were viewed as somewhat less important. Satisfaction was greatest with respect to the City's efforts to landscape median strips and other areas of the City (97%), provide street sweeping services (96%), maintain local streets and roads (96%), and enforce zoning regulations (93%).

## RECREATION

- Among 10 recreational amenities and facilities presented, residents assigned the highest priority to expanding and improving the network of walking, hiking, and biking trails (81% high or medium priority), and adding and upgrading playground equipment at existing parks (71%). At the other end of the spectrum, residents assigned substantially lower priority ratings to providing pickleball courts (18%), a splash pad (28%), and additional outdoor exercise equipment (44%).

## TRAFFIC

- Residents reported that, on average, they encounter bad traffic on Orange County freeways on more than half (59%) of their trips. Trips on major streets in the City were somewhat better, with an average of 43% involving bad congestion, compared with roughly 16% of trips in residential areas of the City.
- Most residents (80%) felt that Lake Forest has either less (39%) or about the same amount (41%) of traffic congestion as neighboring Orange County cities. A minority (17%) of residents surveyed felt that Lake Forest has more congestion than other Orange County cities, whereas 4% were unsure or unwilling to answer the question.
- Two-thirds of residents indicated they were very (24%) or somewhat (43%) satisfied with the City's efforts to improve circulation by improving roads and intersections, timing traffic signals, and other measures, whereas approximately one-quarter were very (12%) or somewhat (16%) dissatisfied.
- Residents were asked, *If the City could fund only one traffic or transportation-related project, what should it be?* One-third (33%) of respondents were unsure or could not think of a traffic or transportation-related project to fund. Synchronizing traffic signals (19%) and addressing traffic on major streets in the City (11%) were the most common specific suggestions, followed by increasing/improving transit schedules, routes and/or bus frequency (8%) and addressing traffic congestion in general (8%). An additional 5% of residents surveyed said the City should not fund any transportation projects.

## COMMUNICATION

- Overall, 73% of residents indicated that they were either very (35%) or somewhat (39%) satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means.
- Among local businesses, 76% of business managers surveyed indicated that they were satisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means, 12% said they were dissatisfied, whereas 12% were unsure.
- The single most frequently cited source of city information among residents in 2016 was the *Leaflet* (39%), followed by the *Orange County Register* (18%), Internet in general (not the City's site) (15%), Facebook/Social Media (11%), and the City's Newsletter (general mention)(10%).
- Fifty-four percent (54%) of residents surveyed mentioned *at least one* of Lake Forest's newsletters as a source of City information.
- When asked what information sources they use to find out about City news, information, and programming, members of the business community were most likely to mention *The Leaflet* (21%), the City's website in general (19%), and the Internet in general (18%). Other commonly mentioned sources included the City's electronic newsletter (13%), a City Newsletter in general (9%), and the *Orange County Register* (8%).
- Overall, 41% of businesses surveyed mentioned *at least one* of Lake Forest's newsletters as a source of City information.
- Lake Forest business managers indicated that email was the most effective method the City can use to communicate with their business (85% very or somewhat effective), followed by the City's website (83%), e-Newsletters (81%), direct mail to their office (80%), and a smart phone application (77%).

- Fifty-seven percent (57%) of residents indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Website visitors expressed high levels of satisfaction with the City's websites, with 80% of residents indicating they were satisfied with the resources available on the sites.
- Among the communication methods tested, email received the highest percentage of residents indicating they would be likely to use the method (86%) when communicating information to the City, followed by the *Ask Lake Forest* website feature (68%), a smart phone application (67%), and telephone (61%).
- By comparison, residents were less likely to state they would use letters sent via traditional mail (41%), tours, workshops or in-person meetings (43%), online townhall meetings (49%), and social media (51%) to communicate information to the City of Lake Forest.
- When asked how likely they would be to use various features of a proposed Lake Forest mobile app, a majority of residents expressed interest in each feature tested. The highest rates of anticipated use were provided for emergency notifications pushed to your phone (84% very or somewhat likely to use the feature), public safety news and events (79%), and reporting potholes, graffiti, and other neighborhood concerns to the City (79%).
- Forty-one percent (41%) of local businesses indicated that they had visited the City of Lake Forest's economic development website ([www.lakeforestbusiness.com](http://www.lakeforestbusiness.com)).
- When asked to rate their level of interest in a variety of topics that could be addressed on the City's economic development website, local businesses expressed the highest levels of interest in a Shop and Dine directory of local businesses (84% very or somewhat interested), followed by information on business seminars and workshops (74%), Business and Financial resource guides (72%), and news stories on grand openings and ribbon-cutting events (71%).
- Business managers were also asked about their interest in attending a variety of seminars the City is considering. Businesses expressed the greatest interest in attending business networking events (71% very or somewhat interested), social media and marketing seminars (70%), business marketing and sales seminars (69%), and workshops that address legal issues for businesses (68%).

## BUSINESS BACKGROUND INFO

- When asked to identify the most important factor for why they chose to locate their business in the City of Lake Forest, approximately one-quarter (23%) indicated that it is close to the owner's home, and an additional 21% mentioned location/accessibility of Lake Forest. Other specific reasons included competitive lease rates/rents (9%), proximity to freeways (8%), and that Lake Forest is close to their clients/customers (5%).
- Local businesses were generally optimistic about their future growth, with 52% anticipating growth and 36% expecting that their business would remain about the same in the coming year. Just 3% indicated that they expect their business to decrease during this period, whereas 6% were unsure.
- Among the 52% of businesses that anticipated growth, 10% indicated that they would require additional space whereas the remaining 42% were either unsure or did not anticipate needing additional space.
- Eight percent (8%) of businesses surveyed anticipated relocating in the next year. Approximately 2% expected to relocate to another community.





## CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide the City of Lake Forest with a statistically reliable understanding of the opinions, priorities, and concerns of Lake Forest residents and businesses. Operating from the philosophy that you can't manage what you don't measure, since 1998 Lake Forest has regularly used the survey as a community needs assessment and performance measurement tool. In short, the study presents an opportunity to profile residents' and local businesses' needs and priorities, measure how well the City is performing in meeting these needs through existing services and facilities, and gather data on a variety of quality-of-life, issue, and policy-related matters. More than just a profiling exercise, the City has been a leader in using the information gained from the studies to adjust and improve its services—all toward the goal of building and sustaining a high level of community satisfaction.

Whereas subsequent sections of this report are devoted to conveying the detailed results of the surveys, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

*How well is the City performing in meeting the needs of Lake Forest residents and businesses?*

Lake Forest residents and businesses are generally satisfied with the City's efforts to provide municipal services and facilities, as well as the quality of life and business climate in the City. More than eight-in-ten residents (81%) and local businesses (87%) indicated that they were satisfied with the City's overall performance in providing municipal services and offered positive ratings (excellent or good) for the quality of life in Lake Forest (91%) and local business climate (79%), respectively.

The high level of satisfaction expressed with the City's performance *in general* was typically echoed when residents and businesses were asked to comment on the City's efforts to provide a variety of specific services. For all but four of the services tested, the City is meeting or exceeding the needs and expectations of at least 80% of its residents (see Figure 32 on page 40), with the highest levels of satisfaction among residents being expressed for the City's efforts to provide garbage collection services, crossing guards near schools, special community events like concerts in the park and holiday celebrations, and tree maintenance.

The results of the 2016 business survey showed a similar pattern of high satisfaction for most services tested. For all of the services tested, the City is meeting or exceeding the needs and expectations of at least 80% of local businesses (see Figure 33 on page 40), with the highest levels of satisfaction among businesses being expressed for the City's efforts to landscape street medians and other parts of the City, provide street sweeping, maintain local streets and roads, and provide building permit services.

*Are there any notable trends in the data?*

As noted in the *Introduction*, True North recommended that the City of Lake Forest transition to a mixed-methodology for the 2016 resident survey that utilized multiple recruiting methods (telephone and email) as well as multiple data collection methods (telephone and online). Although transitioning to this new methodology improves the overall reliability and comparability of the City's resident survey moving forward, it does create a methodological break in the time series of studies. For this reason, although comparisons between the 2016 resident survey and prior surveys are provided in the graphics included in this report, it's important to keep in mind that a difference in the survey results could be caused by a change in public opinion, be an artifact of a change in the methodology, or a mixture of both (see *Methodological Changes & Comparisons to Prior Studies* on page 2). This change does not affect comparisons for the business survey over time, as the business study has used the same mixed-method approach for several survey cycles.

The aforementioned caveat notwithstanding, a careful analysis of the resident survey data (both overall and within specific subgroups) suggests that the issues of growth/development and traffic management have increased in saliency over the past several years. These issues figure prominently in response to open-ended questions about what the City could change to improve Lake Forest as a place to live (see *Changes to Improve City* on page 17) and appear in various forms<sup>1</sup> near the top of the priority list for residents (see *Performance Needs & Priorities* on page 38).

That these issues have become more salient for some residents is not surprising. Nor is it a pattern unique to Lake Forest. Prior to the recession, the dominant issues of concern for residents in many southern California communities were growth, development, open space protection, and traffic congestion. In 2006, for example, nearly one-in-four Lake Forest residents (24%) cited traffic congestion as the most important issue facing the City, and 29% indicated they were dissatisfied with the City's efforts to reduce traffic congestion.

As the economy soured in 2008 and then fell into a deep recession, concerns about the economy, jobs market, and economic development began to overshadow other issues in the minds of many residents—in Lake Forest as well as other cities throughout California. The recession was also associated with lighter peak-period traffic conditions in many areas due to higher unemployment, as well as a virtual halt to new construction. During the heart of the recession in 2010, just 3% of Lake Forest residents mentioned growth and 15% cited traffic congestion as the

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1. Although managing growth and development is not tested directly in the list of services, the issues of 'enforcing zoning regulations' and 'issuing building permits' are often seen as proxies for commenting on building and development in a city.

most important issues facing the City. The percentage who indicated that they were dissatisfied with the City's efforts to manage traffic congestion also declined to 23%.

With the economy now in full recovery, low unemployment, and construction resuming, concerns about growth, development, loss of open space, and traffic congestion have begun to return to their pre-recession levels in many communities. When asked what city government could do to make Lake Forest a better place to live, reducing traffic congestion (11%) and limiting growth/development (11%) were the top two specific suggestions in 2016. Recognizing that these combined figures are still lower than their pre-recession levels, they nevertheless have trended upward over the past two survey cycles.

Although the City's ability to manage traffic congestion is limited and residents generally perceive that Lake Forest has less (39%) or about the same level (41%) of traffic as in other Orange County cities, the survey results do indicate that residents and businesses would approve of the City exploring ways to make improvements in this area—especially on major streets in Lake Forest. Synchronizing traffic signals, in particular, was the traffic or transportation-related improvement most desired by residents. For more on the subject of traffic, turn to *Traffic* on page 43.

Animal control services is another issue that rose higher in the priority list in the 2016 resident survey. Although it is viewed as the least important of the Police services tested and most residents (78%) expressed that they were satisfied with the City's efforts in this area, the percentage who indicated they were dissatisfied was notably higher in 2016 when compared to prior survey cycles.

The picture with Lake Forest businesses is a bit different. Among the business community, the importance assigned to reducing traffic congestion increased substantially when compared to the 2014 study findings, although satisfaction with the City's efforts to manage traffic congestion also increased (+7%). The importance assigned to providing building permits, business watch programs, business networking events, and building inspection services all increased significantly during the past two years, while satisfaction with the City's efforts to provide business networking events and education events declined during the same period.

*Where should the City focus its efforts in the future?*

In addition to measuring the City's current performance, a key goal of this study is to look *forward* and identify opportunities to adjust services, improve facilities, and/or refine communications strategies to best meet the community's evolving needs and expectations. Although resident and business satisfaction in Lake Forest is quite high (see above),

there is always room for improvement. Below we note some of the areas that present the best opportunities in this regard.

Considering respondents' verbatim answers regarding what they feel city government could do to make Lake Forest a better place to live and work (see *Ways to Improve Lake Forest* on page 17), as well as the list of services and their respective priority status for future city attention (see *Performance Needs & Priorities* on page 38), the top priorities for residents are reducing traffic congestion, managing growth and development/enforcing zoning regulations, providing animal control services, and cleaning up/redeveloping older, deteriorating areas in the city. For local businesses, the top priorities are increasing business networking opportunities, providing business education events, reducing regulations/restrictions, and reducing traffic congestion.

With the recommendation that the City focus on these areas, it is equally important to stress that when it comes to improving satisfaction in service areas, the appropriate strategy is often a combination of better communication and actual service improvements. Choosing the appropriate balance of actual service improvements and efforts to raise awareness/understanding through communications will be a key to maintaining and improving the community's overall satisfaction in the short- and long-term.

It is also important to keep in mind that although these areas represent opportunities to improve resident and/or business satisfaction, the City should *not* oversteer. Indeed, the main message of this study is that the City does many things exceptionally well and the emphasis should be on continuing to perform at a high level in these areas. The vast majority of residents and businesses were pleased with the City's efforts to provide services, programs, and facilities and have a favorable opinion of the City's performance in virtually all areas. The *top priority* for the City should thus be to do what it takes to maintain the high quality of services that it currently provides.

*How well is the City communicating with residents and local businesses?*

The importance of city communication with residents and local businesses cannot be overstated. Much of a city's success is shaped by the quality of information that is exchanged in both directions, from the city to the community and from the community to the city. This study is just one example of Lake Forest's efforts to enhance the information flow to the City to better understand the community's concerns, perceptions, and needs. Some of Lake Forest's many efforts to communicate with its residents and local business community include its newsletters, timely press releases, street banners, Facebook presence, and its various websites.

Keeping up with the challenge of communicating with residents and local businesses has been difficult for many public agencies over the past five years. As the number of information sources/channels available to the public has dramatically increased, it creates greater diversity in *where* residents and local businesses turn for their information. Not only have entirely new channels arisen and become mainstream (e.g., social media), within these channels there is a proliferation of alternative services. Preferences with respect to information sources are also subject to change as new services are made available, which makes the challenge of communicating with residents and businesses a *moving* target.

Fortunately, the community survey provides a method for periodically measuring how the communication habits/preferences of local residents and businesses are changing—information that can help the City make timely adjustments to its communication strategies. Although the details can be found in the body of this report (see *Communication* on page 48), some of the notable trends are the continued migration away from print and toward digital sources (email, City website, e-Newsletter, smart phone app) as the perceived most effective communication channels in both the resident and business communities. In particular, the City is interested in pursuing the development of a smart phone app, a popular communication tool that has shifted the way residents and businesses can conveniently communicate and interact with the City to obtain information or report issues. The proposed Lake Forest smart phone app was a particularly popular item in the 2016 survey, and was rated among the top three most effective methods of communicating information *to* the City. Although residents were *most* interested the app's ability to push emergency notifications to their phone, provide public safety news and events, and allow them to report potholes, graffiti, and other neighborhood concerns, they saw value in all of the app's features (see *Mobile App* on page 60).

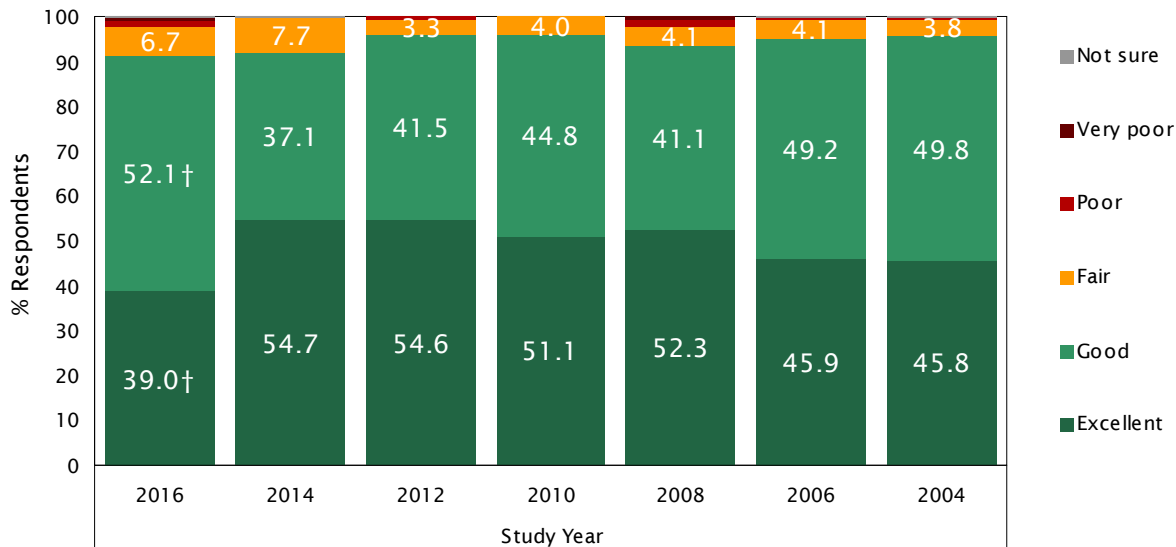
## GENERAL PERCEPTION OF CITY & LOCAL ISSUES

The opening series of questions in the resident and business surveys was designed to gather top-of-mind perceptions about the quality of life in Lake Forest and the business climate, residents' and business managers' satisfaction with the City's overall performance, as well as their ideas for what city government could do to improve the quality of life and improve the business climate in the City.

**QUALITY OF LIFE** At the outset of the resident survey, respondents were asked to rate the quality of life in the City, using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 2 below, the vast majority of respondents shared favorable opinions of the quality of life in Lake Forest, with 39% reporting it is excellent and 52% stating it is good. Seven percent (7%) of residents indicated the quality of life in the City is fair, whereas 2% used poor or very poor to describe quality of life in the City. Between the 2014 and 2016 study, there was a statistically significant increase in the percentage of residents who rated the quality of life in Lake Forest as *good* and a significant decrease in the percentage who described the quality of life as *excellent*.

**Question 2: Resident Survey** *How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor or very poor?*

**FIGURE 2 OVERALL QUALITY OF LIFE: RESIDENT SURVEY (2016 ~ 2004)**

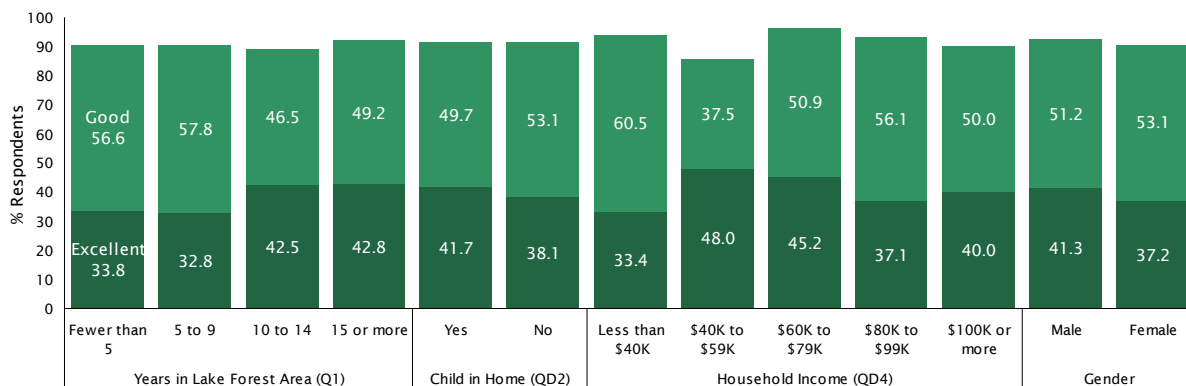


† Statistically significant difference ( $p < 0.05$ ) between the 2014 and 2016 studies.

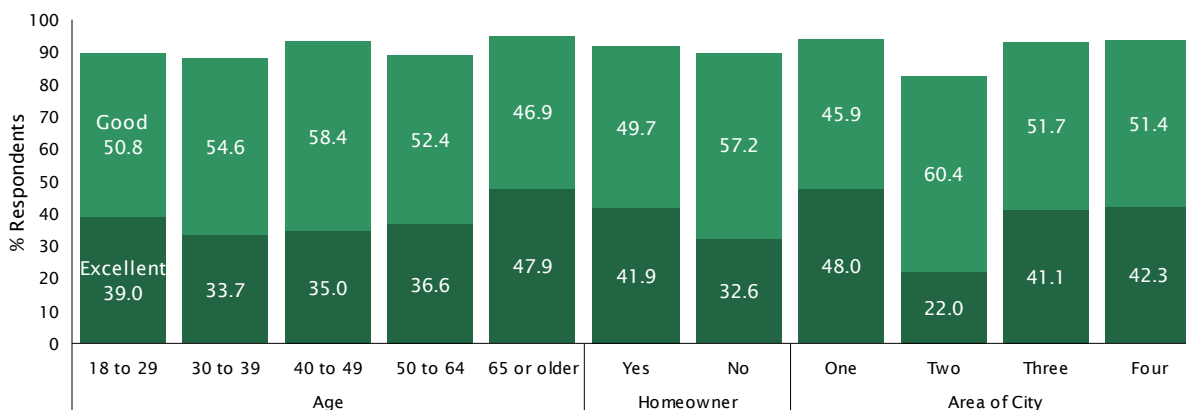
Figures 3 and 4 on the next page show how ratings of the quality of life in the City varied by years of residence in Lake Forest, presence of a child in the home, household income, gender, age of the respondent, home ownership status, and area of the City. Although there was some variation in opinion (e.g., residents who had lived in Lake Forest at least 10 were more likely than their counterparts to cite the quality of life as excellent), the most striking pattern in these fig-

ures is the relative consistency of opinion. Regardless of subgroup category, at least eight-in-ten respondents held a very positive assessment of the quality of life in Lake Forest.

**FIGURE 3 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER**



**FIGURE 4 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY AGE, HOMEOWNER & AREA OF CITY**



**BUSINESS CLIMATE** Respondents in the business survey were asked to rate the business climate in Lake Forest in comparison to other cities in the area, using the same five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 5 on the next page, most respondents shared a favorable opinion of Lake Forest’s business climate. Overall, 33% reported that it is excellent, 46% said it is good, and 17% offered that it is fair. Only 4% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is poor or very poor. The findings of the 2016 business survey for this question were comparable to 2014 study, with no statistically significant changes.

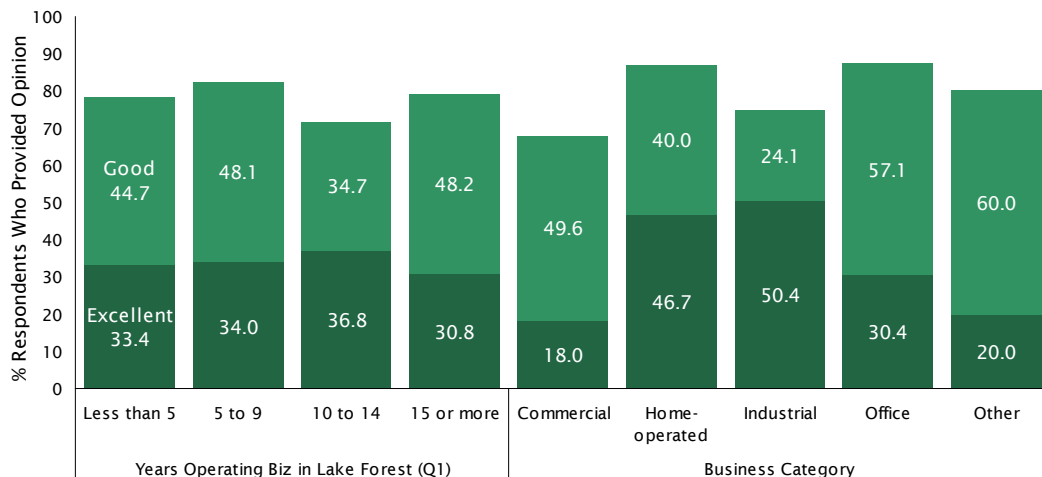
**Question 2: Business Survey** How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?

**FIGURE 5 QUALITY OF BUSINESS CLIMATE (2016 ~ 2004)**



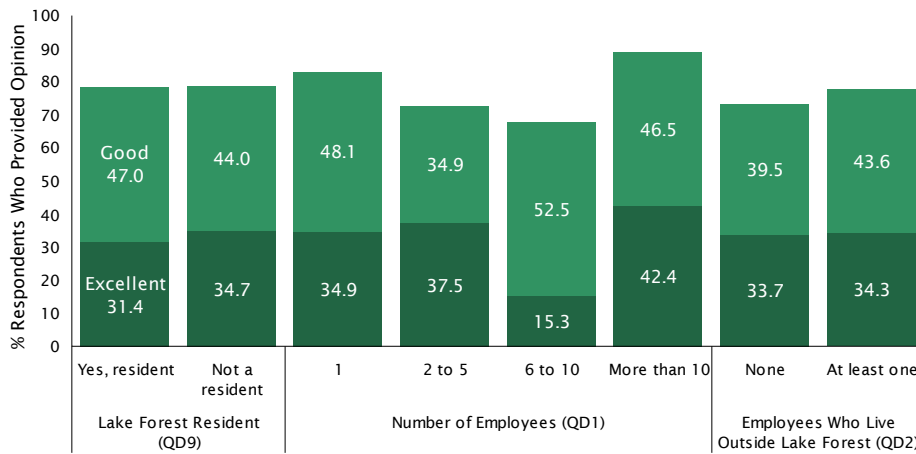
Figures 6 and 7 show how respondents' rating of the business climate in the City was related to the number of years the business has operated in the City, the type of business they operate, whether the respondent was also a Lake Forest resident, the number of individuals employed at their business, and if any of their employees live outside the City of Lake Forest. At least two-thirds of respondents in each subgroup rated the business climate as excellent or good.

**FIGURE 6 QUALITY OF BUSINESS CLIMATE BY YEARS OPERATING BIZ IN LAKE FOREST & BUSINESS CATEGORY**





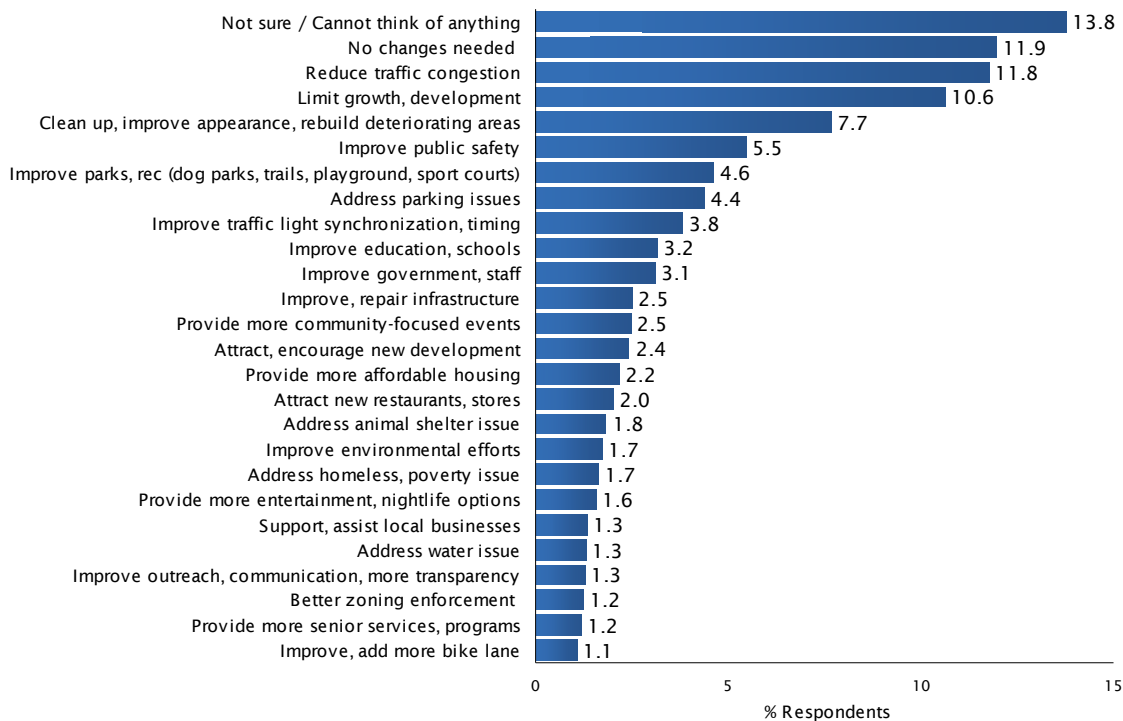
**FIGURE 7 QUALITY OF BUSINESS CLIMATE BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST**



**WAYS TO IMPROVE LAKE FOREST** Residents and business managers were next asked to indicate one thing city government could change to improve Lake Forest. For residents, the question focused on improving the City as a place to live, now and in the future. Business managers were asked more specifically about ways to improve the business climate. These questions were asked in an open-ended manner, allowing respondents to mention any change that came to mind without being prompted by or restricted to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in the next two figures.

**Question 3: Resident Survey** *If the city government could do one thing to make Lake Forest a better place to live now and in the future, what would you like to see?*

**FIGURE 8 CHANGES TO IMPROVE CITY**

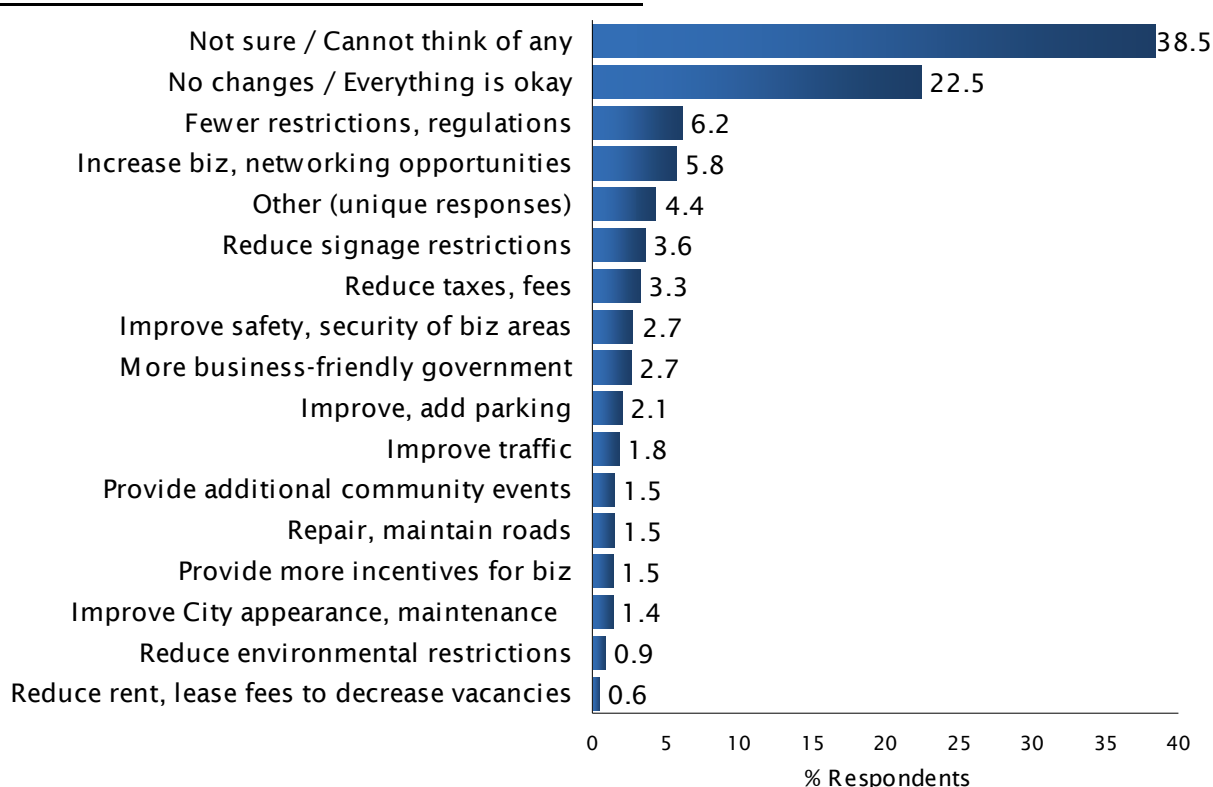


As shown in Figure 8 on the previous page, one-quarter (26%) of residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (14%) or desired no changes from the City (12%). Of the specific suggestions, the most common were reducing traffic congestion (12%), limiting growth and development (11%), cleaning up/improving/rebuilding deteriorating areas of the City (8%), and improving public safety (6%). No other single improvement was mentioned by at least 5% of respondents.

When asked about what the City could do to improve the business climate in Lake Forest (Figure 9), more than half of business managers surveyed were either unsure of a change that could be made (39%) or indicated that no changes were needed (23%). Specific suggestions for improving the business climate included having fewer restrictions/regulations (6%), increasing business networking opportunities (6%), and reducing signage restrictions (4%). No other improvement was mentioned by at least 4% of respondents.

**Question 3: Business Survey** *If the city government could do one thing to improve the business climate in Lake Forest, what would you like to see?*

**FIGURE 9 CHANGES TO IMPROVE BUSINESS CLIMATE**

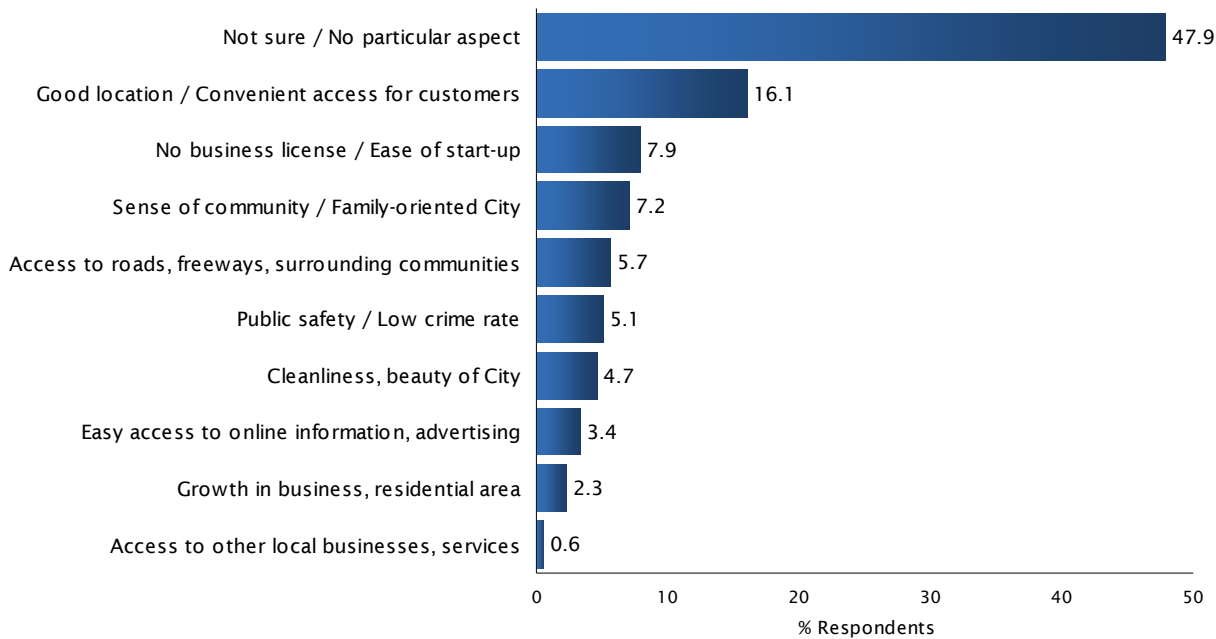


**ASPECTS OF LAKE FOREST MOST BENEFICIAL TO BUSINESS** All businesses were next asked if there was a particular aspect or feature of Lake Forest that is beneficial to their business. This question was also posed in an open-ended manner, allowing respondents to mention any aspect without being prompted by or limited to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 10.

The most common response from business managers was that there were no particular features of Lake Forest that benefit their business, or that they could not think of any at the time of the interview (48%). Among specific aspects mentioned, having a convenient, easily-accessible location within the City (16%), not having to navigate/pay for business license/ease of startup (8%), Lake Forest’s sense of community (7%), and access to roads, freeways, and surrounding communities (6%) were mentioned most often.

**Question 4: Business Survey** *is there a particular aspect or feature of Lake Forest that is beneficial to your business?*

**FIGURE 10 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS**

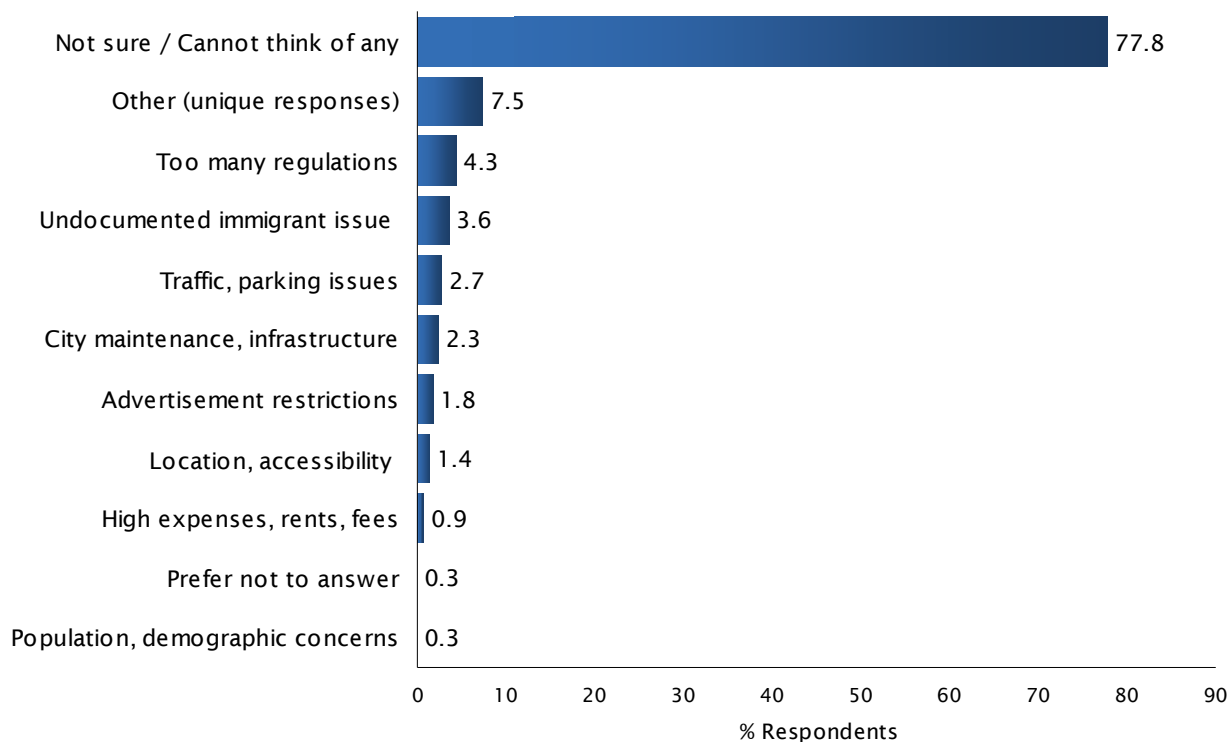


**CHALLENGES OF DOING BUSINESS IN LAKE FOREST** Next, all business managers were asked in an open-ended manner if there were any particular challenges associated with doing business in Lake Forest. Verbatim responses were recorded and later grouped into the categories shown in Figure 11 on the next page.

Nearly eight-in-ten business managers surveyed (78%) said they could not think of any challenges associated with doing business in Lake Forest. The most common specific challenges cited were too many regulations (4%), undocumented immigrant issues (4%), and traffic/parking issues (3%).

**Question 5: Business Survey** *Are there any particular challenges associated with doing business in Lake Forest?*

**FIGURE 11 CHALLENGES WITH DOING BUSINESS IN LAKE FOREST**



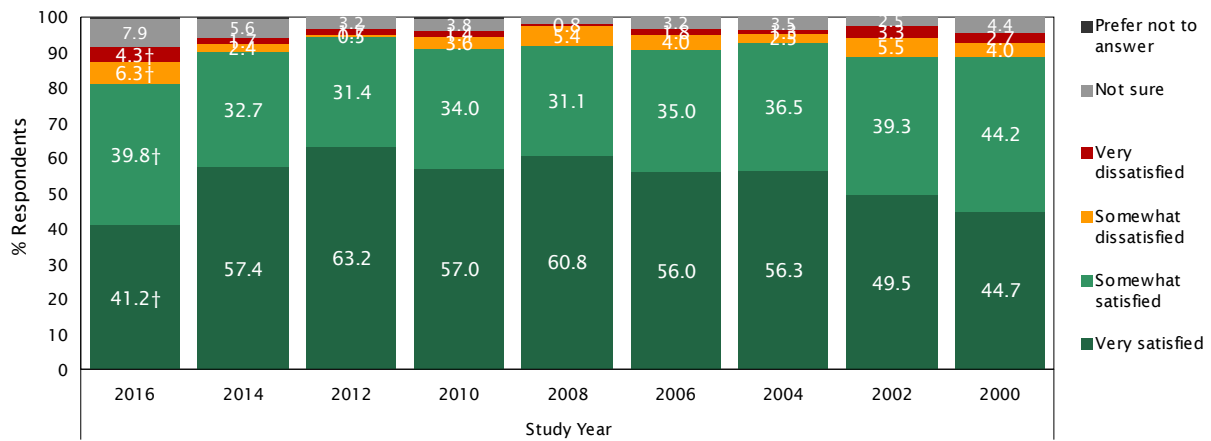
**OVERALL PERFORMANCE RATING** Both residents and businesses were asked to rate the job the City of Lake Forest is doing to provide municipal services. Because this question does not reference a specific program, facility, or service, and requested that the respondent consider the City’s performance in general, the findings of this question may be regarded as an *overall performance rating* for the City.

Figure 12 on the next page presents the results of this question for the resident survey for 2016 and for prior surveys dating back to 2000, whereas Figure 15 presents the corresponding results for the business survey. In both cases, the vast majority of respondents indicated that they were satisfied with the City of Lake Forest’s efforts to provide municipal services. Specifically, 81% of residents and 87% of local businesses in 2016 indicated that they were satisfied in this respect.

Keeping in mind that differences between the 2016 resident survey and prior surveys can be an artifact of the change in methodology implemented this cycle (see *Methodological Changes & Comparisons to Prior Studies* on page 2), Figure 12 shows that overall satisfaction with the City’s efforts to provide municipal services was significantly lower in 2016 when compared to 2014. The methodology for the business survey in 2016 was the same as in 2014, and among business respondents there were no statistically significant changes in satisfaction from 2014.

**Question 4: Resident Survey** *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

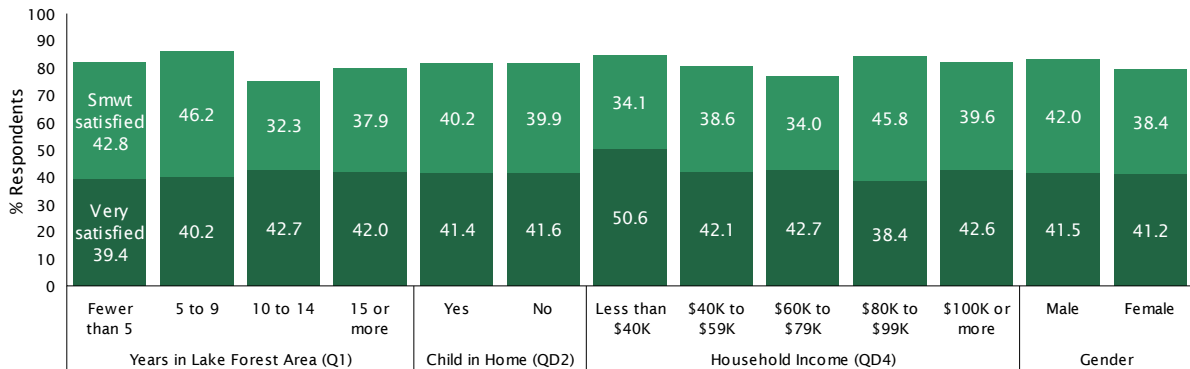
**FIGURE 12 OVERALL SATISFACTION: RESIDENT SURVEY (2016 ~ 2000)**



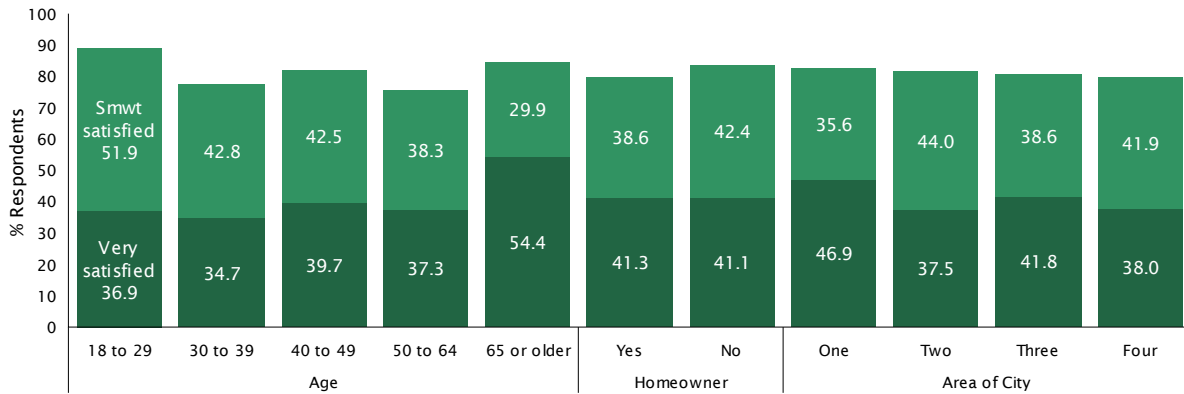
† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

Figures 13 and 14 below display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 16 and 17 present similar information for the business community. Overall satisfaction was consistently high across all subgroups with approximately eight-in-ten residents and at least eight-in-ten business managers in every segment indicating they were very or somewhat satisfied.

**FIGURE 13 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME, HOUSEHOLD INCOME & GENDER**

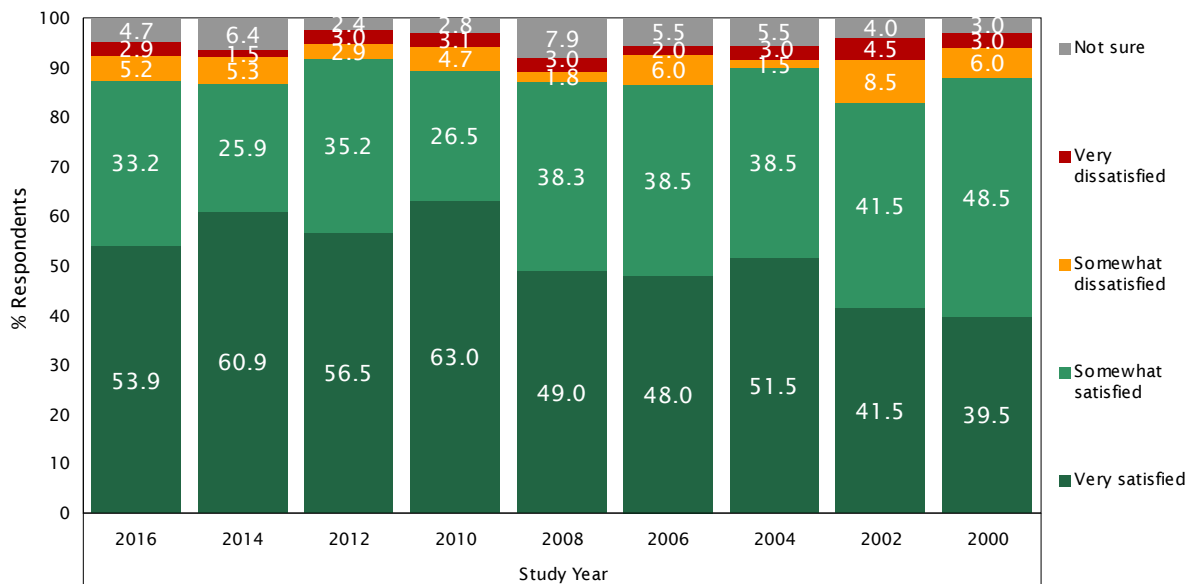


**FIGURE 14 OVERALL SATISFACTION: RESIDENT SURVEY BY AGE, HOMEOWNER & AREA OF CITY**

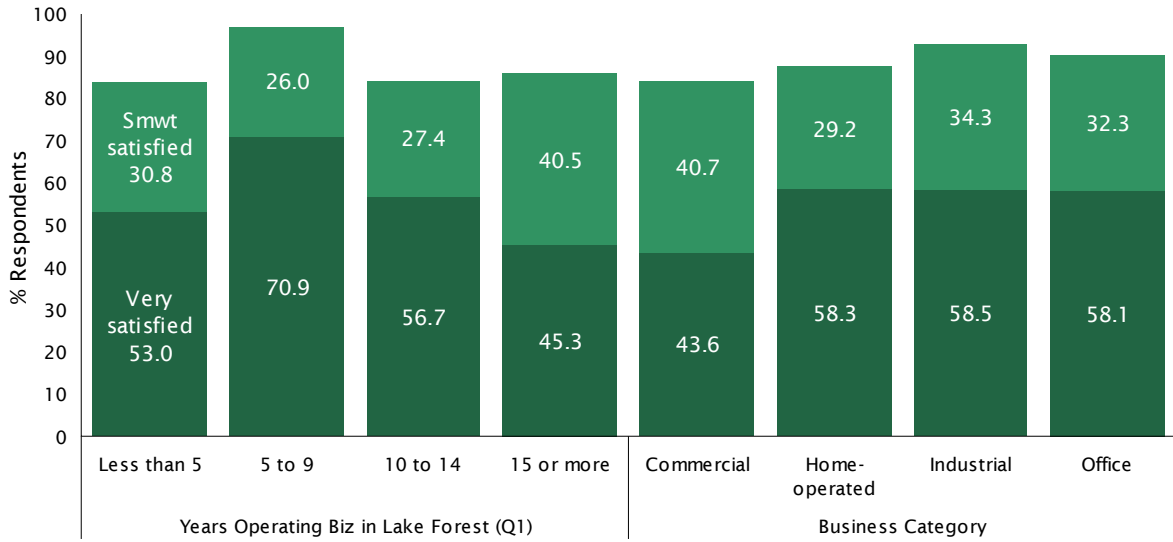


**Question 6: Business Survey** *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

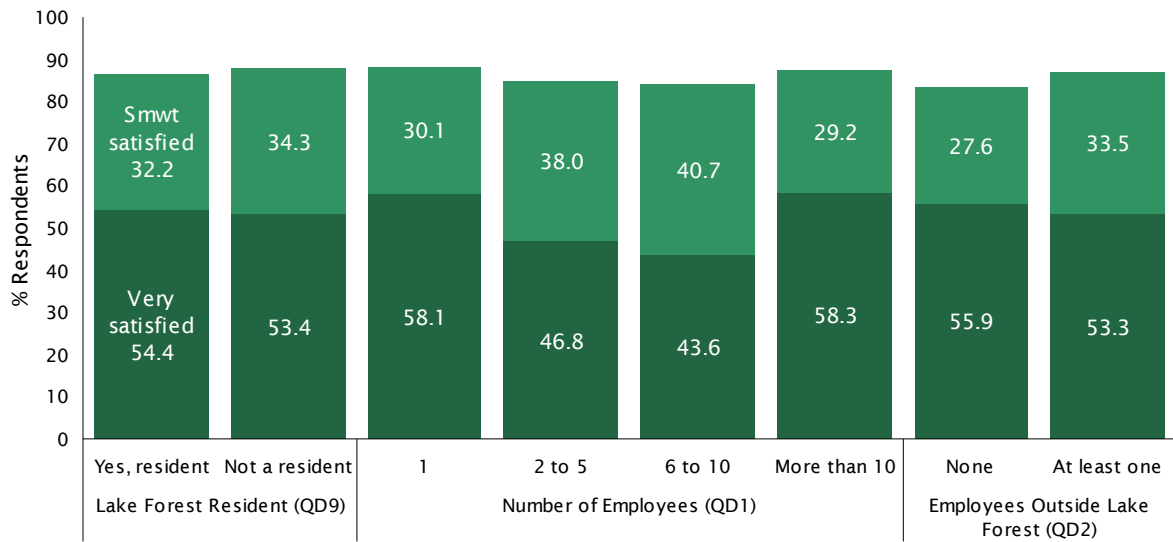
**FIGURE 15 OVERALL SATISFACTION: BUSINESS SURVEY (2016 ~ 2000)**



**FIGURE 16 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST & BUSINESS CATEGORY**



**FIGURE 17 OVERALL SATISFACTION: BUSINESS SURVEY BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES OUTSIDE LAKE FOREST**



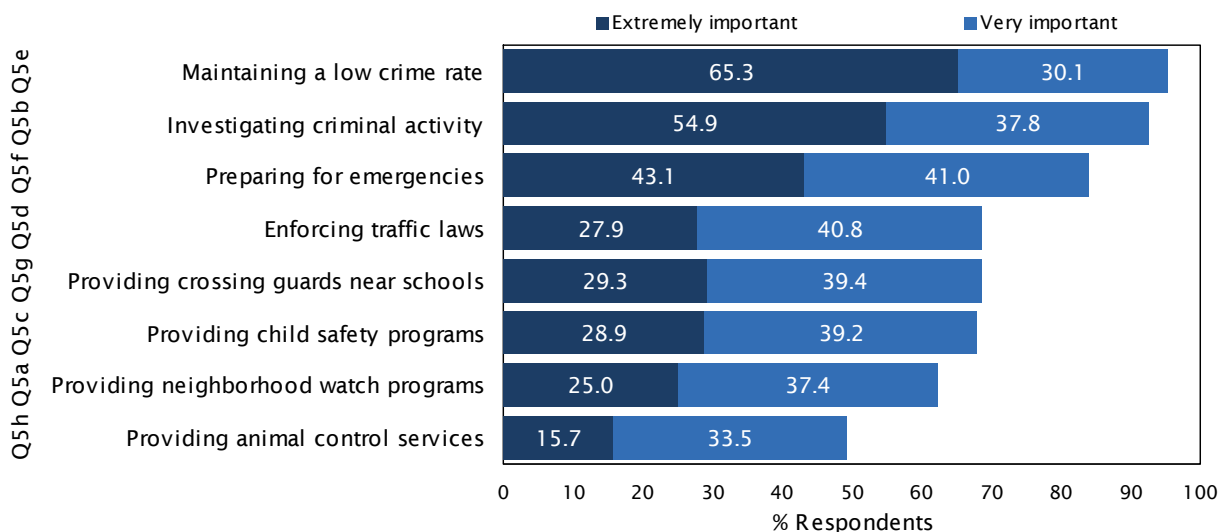
# SPECIFIC SERVICES: RESIDENT SURVEY

Whereas Question 4 of the resident survey addressed the City of Lake Forest’s *overall* performance, the next series of questions asked respondents to rate the importance of *specific* services offered by the City, as well as their level of satisfaction with efforts to provide these services. For each service, respondents were asked if they thought a service was extremely important, very important, somewhat important, or not at all important. Respondents were then asked about their satisfaction with these same services. To minimize respondent fatigue that can occur with lengthy lists in a survey, the services were divided by department. Within department lists, the order of the items was randomized to avoid a systematic position bias. Because the list of services presented to residents was somewhat different than that presented to businesses, the results are displayed separately for the two groups. This section of the report presents the results for the resident survey; results for the business survey are discussed in the next section.

**POLICE SERVICES** Figure 18 presents the services provided by the Police Department sorted in order of importance according to the percentage of respondents who rated a service as *at least* very important. Overall, residents rated maintaining a low crime rate as the most important service (95% extremely or very important), followed by investigating criminal activity (93%) and preparing for emergencies (84%). At the other end of the spectrum, providing animal control services (49%) and providing neighborhood watch programs (62%) were viewed as less important. Table 1 on the next page displays the percentage of respondents who viewed each service as extremely or very important for 2016 and 2014, as well as the difference between the two studies. There were two statistically significant differences as indicated.

**Question 5: Resident Survey** *Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Police Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.*

**FIGURE 18 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY**





**TABLE 1 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY (2016~ 2014)**

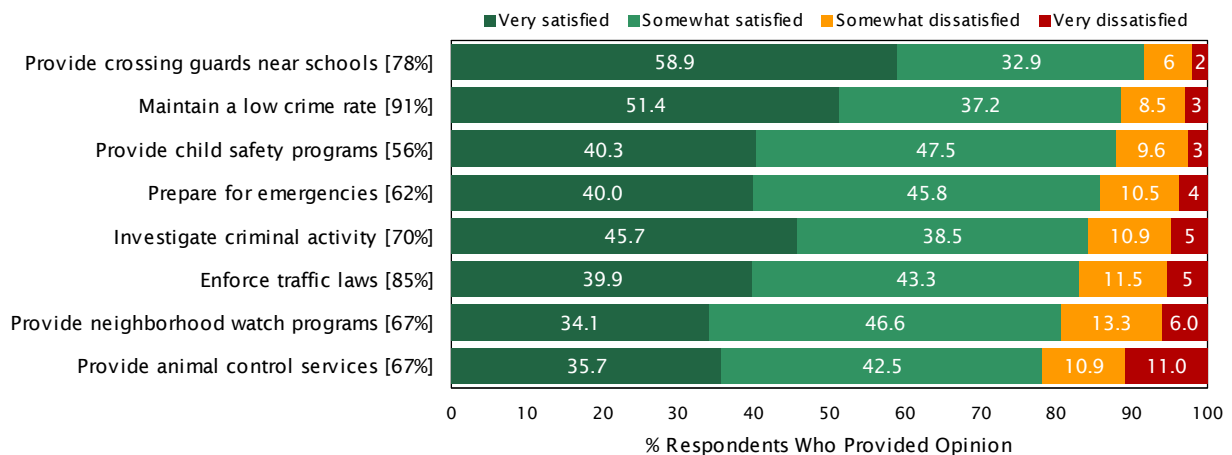
	Study Year		Change in Extremely + Very Important
	2016	2014	
Preparing for emergencies	84.1	77.8	+6.3†
Maintaining a low crime rate	95.4	90.5	+4.9†
Enforcing traffic laws	68.7	64.3	+4.4
Providing neighborhood watch programs	62.4	58.2	+4.2
Investigating criminal activity	92.7	89.4	+3.3
Providing child safety programs	68.1	65.4	+2.7
Providing animal control services	49.2	50.1	-0.9
Providing crossing guards near schools	68.7	72.0	-3.3

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

Turning to the satisfaction component, Figure 19 sorts the same list of services according to the percentage of respondents who said they were either very or somewhat satisfied with the City’s efforts to provide the service. To allow for an apples-to-apples comparison of the satisfaction ratings, only respondents who provided an opinion (either satisfied or dissatisfied) are included in Figure 19—those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each service is shown to the right of the service label in brackets. Thus, for example, among the 78% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 59% were very satisfied and 33% were somewhat satisfied. This reporting convention is followed for all departments for the resident and business surveys.

**Question 6: Resident Survey** *For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion?*

**FIGURE 19 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY<sup>2</sup>**



2. Those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each service is shown to the right of the service label in brackets. Thus, for example, among the 78% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 59% were very satisfied and 33% were somewhat satisfied. This reporting convention is followed for all departments for the resident and business surveys.

Satisfaction was high for all police services tested. Overall, respondents were most satisfied with the Department’s efforts to provide crossing guards near schools (92% very or somewhat satisfied), maintain a low crime rate (89%), and provide child safety programs (88%). Again keeping in mind that the change in methodology between the two study years can impact the comparisons, Table 2 below shows how the 2016 results compare with the prior 2014 study.

**TABLE 2 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY (2016 ~ 2014)**

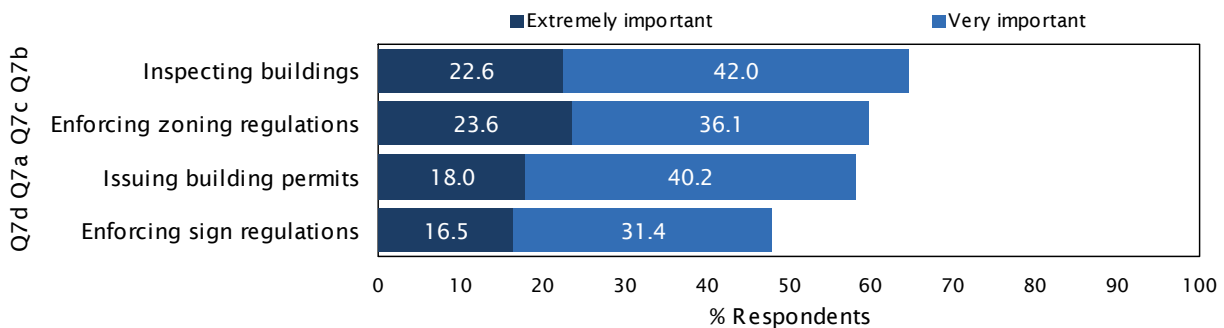
	Study Year		Change in Satisfaction
	2016	2014	
Provide crossing guards near schools	91.8	96.4	-4.6†
Provide neighborhood watch programs	80.7	87.8	-7.1†
Maintain a low crime rate	88.6	95.9	-7.3†
Prepare for emergencies	85.8	93.3	-7.6†
Provide child safety programs	87.8	96.1	-8.2†
Investigate criminal activity	84.2	93.8	-9.6†
Enforce traffic laws	83.1	93.6	-10.5†
Provide animal control services	78.2	92.3	-14.2†

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

**DEVELOPMENT SERVICES DEPARTMENT** Figure 20 presents the services provided by the Development Services Department sorted by order of importance according to the percentage of residents who rated a service as *at least* very important. Overall, residents rated inspecting buildings as the most important service provided by the Department (65%), followed by enforcing zoning regulations (60%), issuing building permits (58%), and enforcing sign regulations (48%). When compared with 2014, there were statistically significant changes in the perceived importance of three of these services (see Table 3).

**Question 7: Resident Survey** *Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Development Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.*

**FIGURE 20 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY**



**TABLE 3 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY (2016 ~ 2014)**

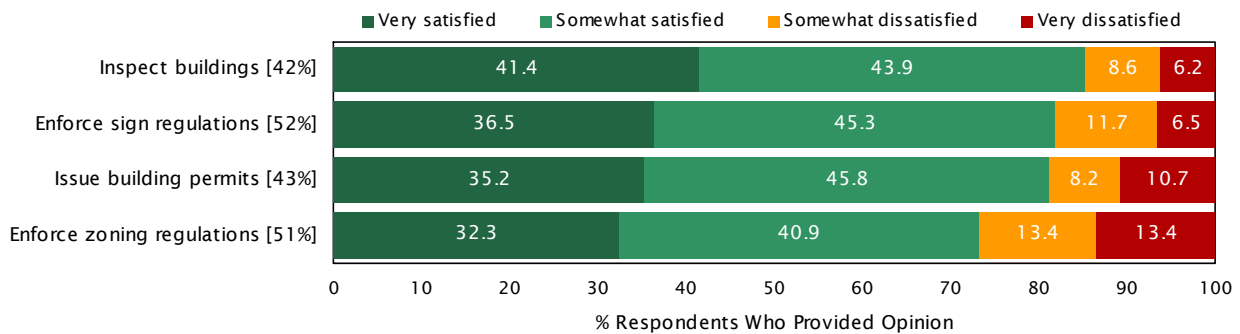
	Study Year		Change in Extremely + Very Important
	2016	2014	
Issuing building permits	58.2	48.7	+9.5†
Inspecting buildings	64.6	55.9	+8.7†
Enforcing zoning regulations	59.7	52.8	+6.9†
Enforcing sign regulations	47.9	48.3	-0.3

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

Figure 21 presents residents’ satisfaction with the same list of services provided by the Development Services Department. Satisfaction ratings assigned to the four development services ranged from a low of 73% for enforcing zoning regulations to a high of 85% for inspecting buildings. There were three statistically significant changes between the 2014 and 2016 studies (see Table 4). With the exception of opinions regarding enforcing zoning regulations, satisfaction was comparable among residents who reported that they had (or had not) personally used services offered by the Department in the past year (see Table 5).

**Question 8: Resident Survey** *Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion?*

**FIGURE 21 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY**



**TABLE 4 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY (2016 ~ 2014)**

	Study Year		Change in Satisfaction
	2016	2014	
Issue building permits	81.1	86.8	-5.7
Inspect buildings	85.3	91.6	-6.4†
Enforce sign regulations	81.8	90.6	-8.8†
Enforce zoning regulations	73.2	86.4	-13.2†

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

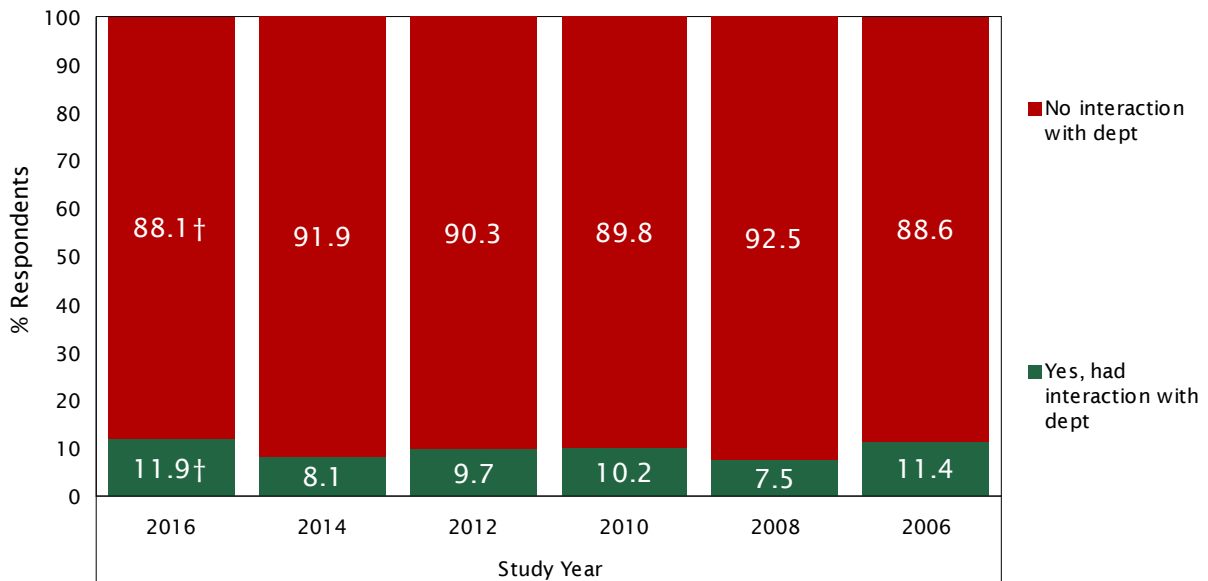
**TABLE 5 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR**

	Interacted With Development Services Department in Past Year		Difference in Satisfaction
	Yes	No	
Issue building permits	81.9	82.2	-0.3
Inspect buildings	85.8	86.9	-1.1
Enforce sign regulations	79.2	82.8	-3.6
Enforce zoning regulations	63.4	75.4	-12.1

Whereas most departments in the City that directly serve the public primarily interact with residents, customers of the Development Services Department are, for the most part, businesses. One question of interest to the study was whether a respondent had interacted with the Development Services Department during the past year. As shown in Figure 22, just 12% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey in 2016, which is slightly higher than the findings of the 2014 study.

**Question 9: Resident Survey** *In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?*

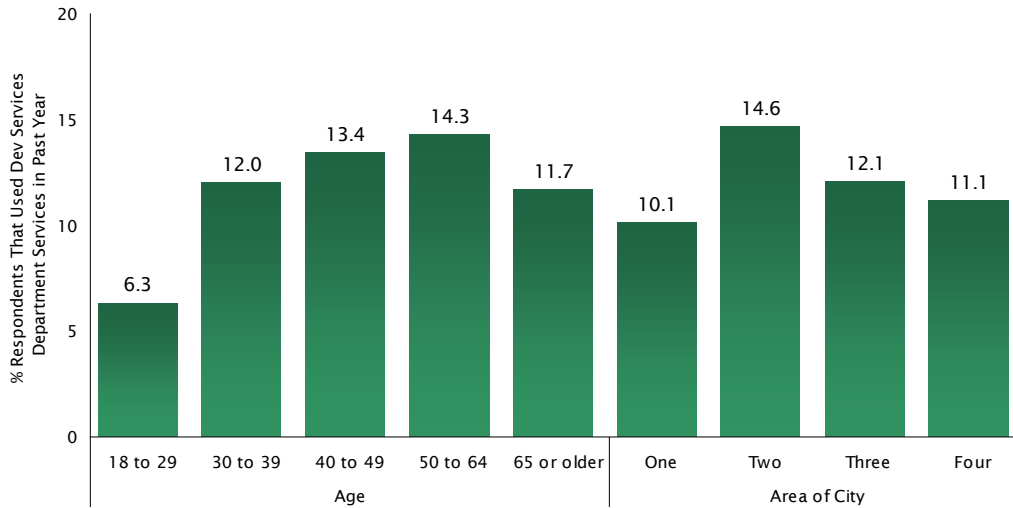
**FIGURE 22 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY (2016 ~ 2006)**



† Statistically significant difference ( $p < 0.05$ ) between the 2014 and 2016 studies.

When compared with their respective counterparts, interaction with the Development Services Department during this period was most frequently reported by middle-aged residents and those who reside in Area Two (see Figure 23).

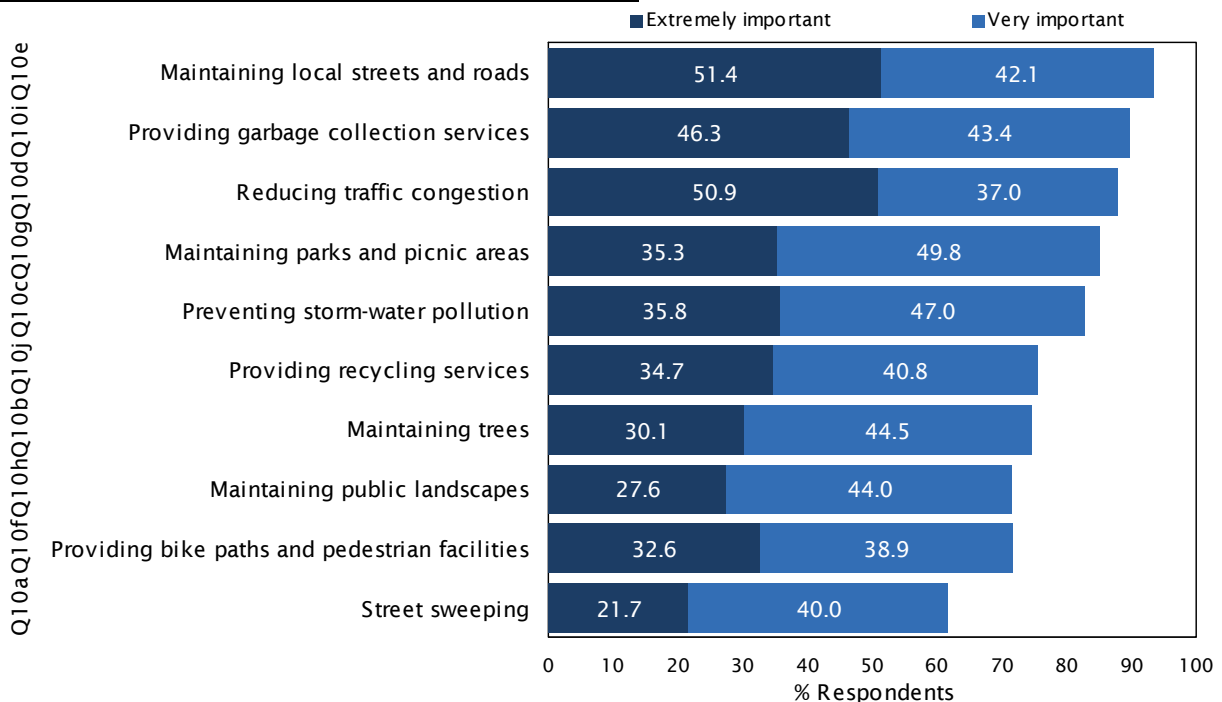
**FIGURE 23 INTERACTED WITH DEVELOPMENT SERVICES IN PAST YEAR: RESIDENT SURVEY BY AGE & AREA OF CITY**



**PUBLIC WORKS DEPARTMENT** The next figure presents the importance that residents assigned to ten services provided by the Public Works Department, sorted in order of importance. Overall, maintaining local streets and roads was viewed as the most important service (94%), followed by providing garbage collection services (90%) and reducing traffic congestion (88%). Table 6 on the next page shows how the measured importance of Public Works services differed between the 2014 and 2016 surveys.

**Question 10: Resident Survey** Next, I'd like to ask about several services provided by the Public Works Department. For each of the following, please tell me whether the service is extremely important to you, very important, somewhat important, or not too important.

**FIGURE 24 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY**



**TABLE 6 IMPORTANCE OF PUBLIC WOKS SERVICES: RESIDENT SURVEY (2016 ~ 2014)**

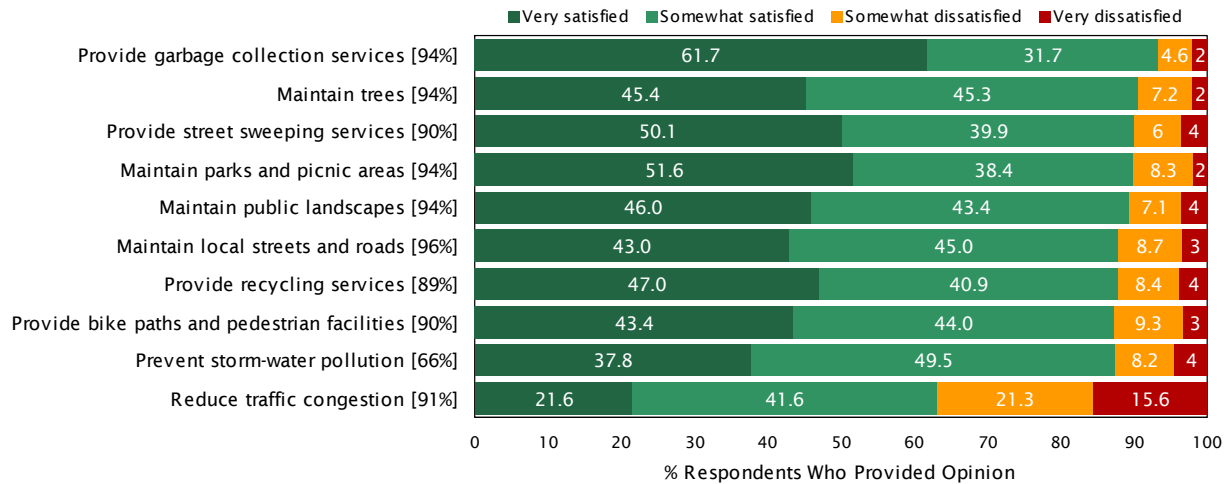
	Study Year		Change in Extremely + Very Important
	2016	2014	
Maintaining parks and picnic areas	85.1	74.9	+10.2†
Preventing storm-water pollution	82.8	73.8	+8.9†
Maintaining public landscapes	71.5	64.7	+6.9†
Reducing traffic congestion	87.9	82.4	+5.5†
Maintaining trees	74.6	69.7	+4.9†
Maintaining local streets and roads	93.4	88.9	+4.5†
Providing bike paths and pedestrian facilities	71.5	67.3	+4.2
Providing recycling services	75.6	72.6	+3.0
Providing garbage collection services	89.7	87.7	+2.0
Street sweeping	61.8	61.4	+0.4

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

Figure 25 presents the levels of satisfaction with the same list of ten services provided by the Public Works Department. Residents were most satisfied with the Department’s efforts to provide garbage collection services (93%), maintain trees (91%), provide street sweeping services (90%), maintain parks and picnic areas (90%), and maintain public landscapes (89%). Table 7 shows how the 2016 results compare with the prior 2014 study.

**Question 11: Resident Survey** *Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion?*

**FIGURE 25 SATISFACTION WITH PUBLIC WOKS SERVICES: RESIDENT SURVEY**



**TABLE 7 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY (2016 ~ 2014)**

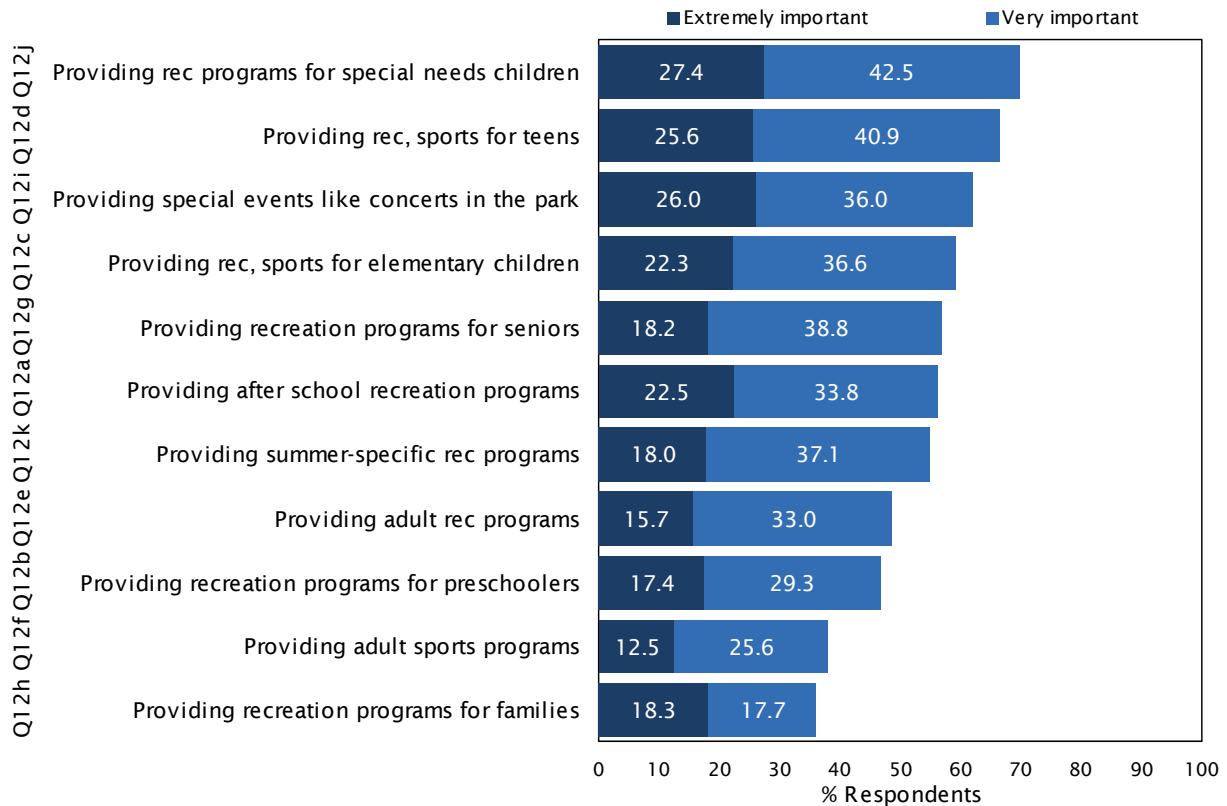
	Study Year		Change in Satisfaction
	2016	2014	
Provide garbage collection services	93.3	95.5	-2.2
Maintain trees	90.6	94.6	-4.0†
Prevent storm-water pollution	87.3	92.4	-5.1†
Provide street sweeping services	90.0	96.0	-6.0†
Maintain local streets and roads	87.9	94.0	-6.1†
Maintain public landscapes	89.3	95.7	-6.4†
Provide bike paths and pedestrian facilities	87.4	93.9	-6.4†
Provide recycling services	87.9	94.3	-6.5†
Maintain parks and picnic areas	89.9	96.5	-6.6†
Reduce traffic congestion	63.1	72.9	-9.7†

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

**COMMUNITY SERVICES DEPARTMENT** In a format identical to that used in questions 5, 7, and 10, Question 12 asked residents to indicate the level of importance they associated with services provided by the Community Services Department. Figure 26 presents each of the services tested, sorted by order of importance.

**Question 12: Resident Survey** *Next I'd like to ask you about a number of services provided by the City of Lake Forest's Community Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.*

**FIGURE 26 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY**



Residents assigned the highest importance to providing recreation programs for special needs children (70%), followed by providing recreation and sports programs for teens (67%), providing special events like concerts in the park and the Fourth of July Parade (62%), and providing recreation and sports programs for elementary school-aged children (59%). Providing adult sports programs (38%) and recreation programs for families (36%) were viewed as less important. There were two statistically significant differences in the importance assigned to recreation services between 2014 and 2016 (Table 8).

**TABLE 8 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY (2016 ~ 2014)**

	Study Year		Change in Extremely + Very Important
	2016	2014	
Providing summer-specific rec programs	55.0	48.9	+6.2†
Providing recreation programs for seniors	57.0	55.7	+1.3
Providing adult rec programs	48.7	48.0	+0.8
Providing adult sports programs	38.1	37.7	+0.4
Providing after school recreation programs	56.3	56.0	+0.3
Providing special events like concerts in the park	62.1	61.9	+0.1
Providing rec, sports for teens	66.5	66.4	+0.1
Providing rec programs for special needs children	69.8	72.2	-2.4
Providing recreation programs for preschoolers	46.7	49.3	-2.6
Providing rec, sports for elementary children	59.0	63.9	-4.9
Providing recreation programs for families	36.0	50.9	-14.9†

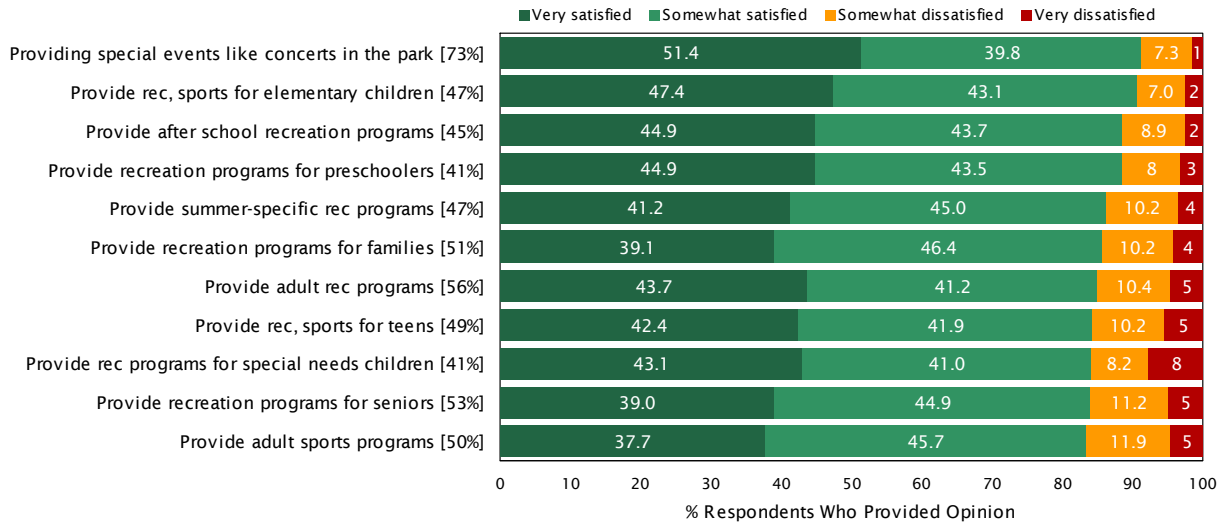
† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

When asked about their satisfaction with the same list of services (Figure 27 on the next page), most residents who held an opinion indicated that they were quite satisfied with every service tested, similar to the patterns found in other departments. Residents expressed the highest levels of satisfaction with the Department’s efforts to provide special events like concerts in the park and the Fourth of July Parade (91%), recreation and sports programs for elementary school-aged children (91%), and after school recreation programs (89%). Residents were somewhat less satisfied with the Department’s efforts to provide sports programs for adults (83%) and recreation programs for seniors (84%). When compared with the results from 2014, there were two statistically significant differences in satisfaction with the City’s efforts to provide recreation services (see Table 9).



**Question 13: Resident Survey** Now I'd like to know how satisfied you are with the job the City of Lake Forest is doing to provide each of the services. Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion?

**FIGURE 27 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY**



**TABLE 9 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY (2016 ~ 2014)**

	Study Year		Change in Satisfaction
	2016	2014	
Provide recreation programs for preschoolers	88.4	87.0	+1.4
Provide rec programs for special needs children	84.1	83.0	+1.1
Provide after school recreation programs	88.6	88.0	+0.6
Provide summer-specific rec programs	86.2	87.1	-0.9
Providing special events like concerts in the park	91.2	92.3	-1.1
Provide rec, sports for elementary children	90.5	92.4	-1.9
Provide adult sports programs	83.4	87.8	-4.4
Provide recreation programs for seniors	83.9	89.1	-5.2
Provide recreation programs for families	85.5	90.7	-5.2
Provide adult rec programs	84.9	91.6	-6.7†
Provide rec, sports for teens	84.3	92.0	-7.7†

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

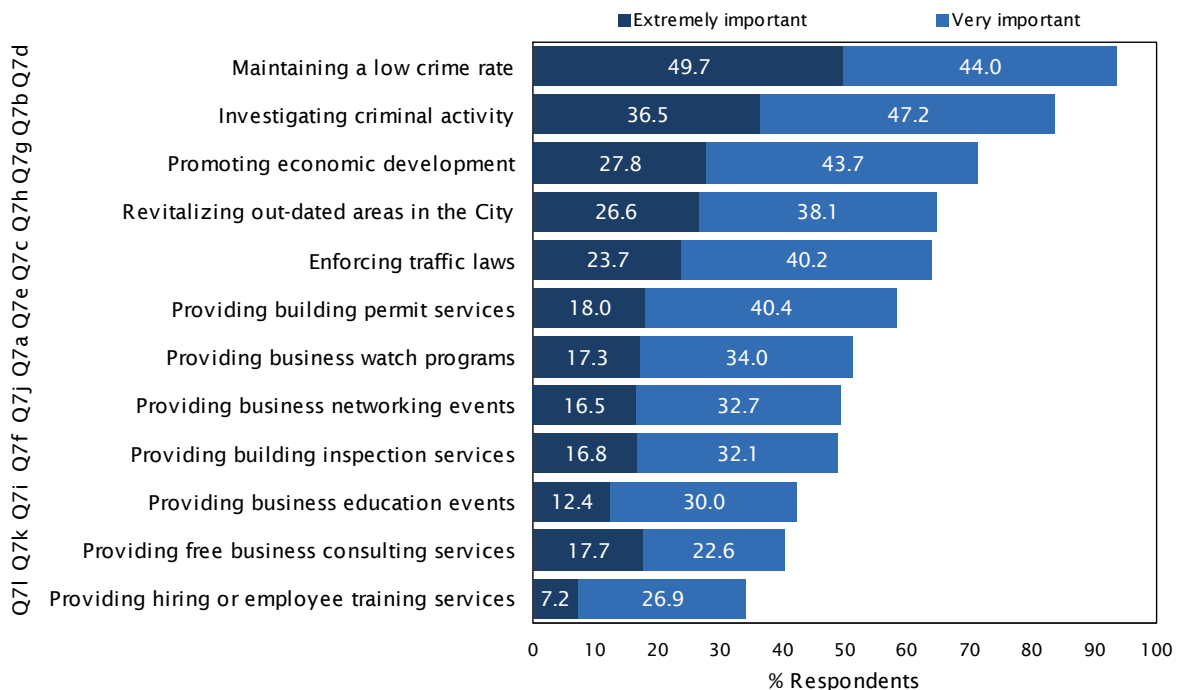
## SPECIFIC SERVICES: BUSINESS SURVEY

Participants in the business survey were also asked to rate the importance of specific services offered by the City of Lake Forest, as well as indicate their level of satisfaction with the City’s current efforts to provide each service. Although some services appear in both the resident and business surveys (e.g., maintaining a low crime rate) the list of services tested with the business community was appropriately tailored to the audience and included services not tested with residents, such as providing business networking events and business consulting services. Because the list of services tested with the business community was considerably shorter than that used in the resident survey, the following figures present the results for services that span several departments.

Figure 28 provides the importance ratings assigned to each of the services tested in the first list, which can be loosely categorized as *general city services*. Overall, the business community rated maintaining a low crime rate as the most important of the services tested (94% extremely or very important), followed by investigating criminal activity (84%), promoting economic development (72%), and revitalizing outdated areas in the City (65%). At the other end of the spectrum, respondents generally viewed the City providing employee hiring/training services (34%), free business consulting services (40%), and business education events (42%) as less important. Table 10 presents the change in importance assigned to each item tested in 2014 and 2016, and highlights those that are statistically significant.

**Question 7: Business Survey** *Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.*

**FIGURE 28 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY**



**TABLE 10 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY (2016 ~ 2014)**

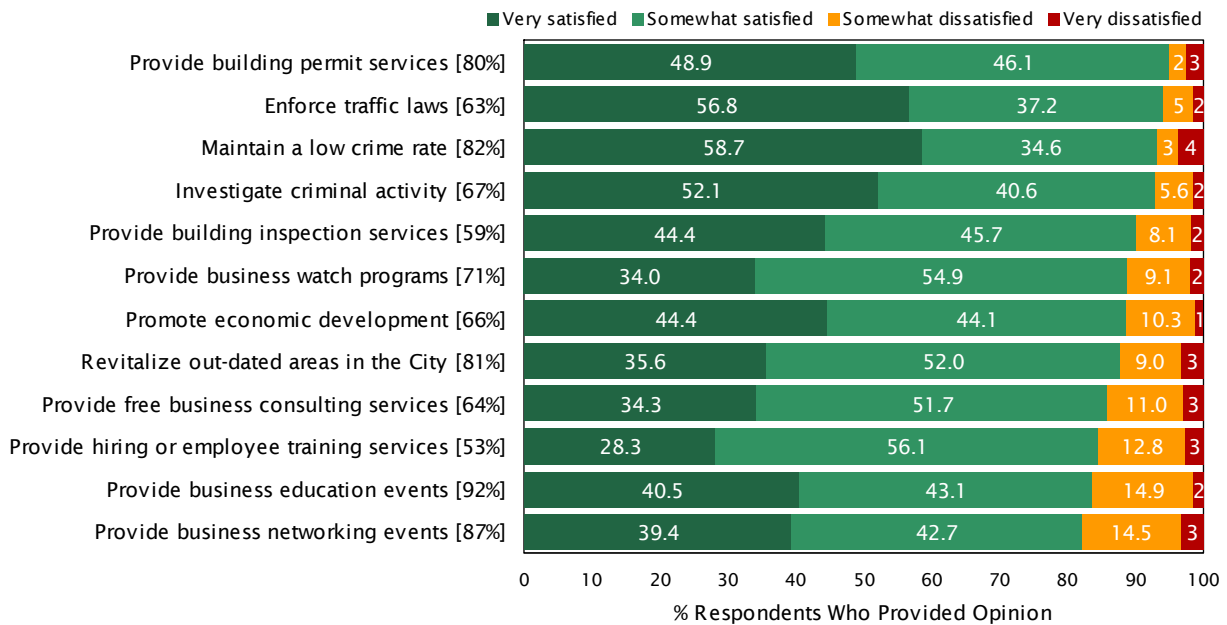
	Study Year		Change in Extremely + Very Important
	2016	2014	
Providing building permit services	58.4	42.3	+16.1 †
Providing business watch programs	51.2	37.3	+13.9 †
Providing business networking events	49.2	38.5	+10.8 †
Providing building inspection services	48.9	38.5	+10.4 †
Providing business education events	42.4	35.5	+6.9
Enforcing traffic laws	63.9	57.2	+6.7
Providing free business consulting services	40.3	34.4	+5.9
Promoting economic development	71.4	68.4	+3.1
Maintaining a low crime rate	93.7	92.8	+0.9
Investigating criminal activity	83.7	85.8	-2.1
Revitalizing out-dated areas in the City	64.7	67.3	-2.6
Providing hiring or employee training services	34.2	N/A	N/A

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

When asked about their satisfaction with the same list of services, the business community indicated that they were quite satisfied with every service tested (see Figure 29). At the top of the list was providing building permit services (95%), followed by enforcing traffic laws (94%), maintaining a low crime rate (93%), and investigating criminal activity (93%). There were two statistically significant changes in satisfaction between 2014 and 2016 (see Table 11 on the next page).

**Question 8: Business Survey** *For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion?*

**FIGURE 29 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY**



**TABLE 11 SATISFACTION WITH SELECT SERVICES I: BUSINESS SERVICES (2016 ~ 2014)**

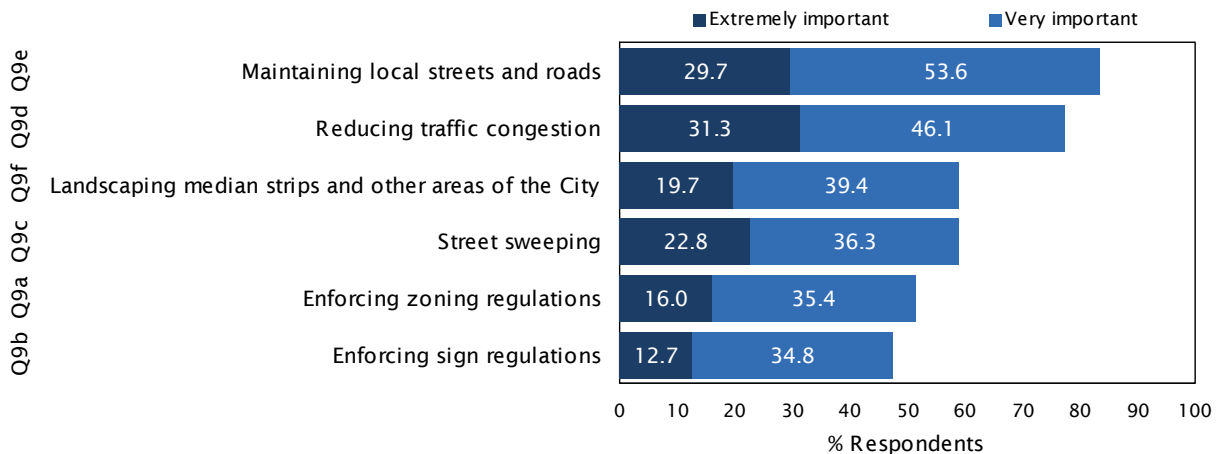
	Study Year		Change in Satisfaction
	2016	2014	
Enforce traffic laws	94.0	90.6	+3.4
Provide building permit services	95.0	92.5	+2.6
Maintain a low crime rate	93.3	95.3	-2.0
Investigate criminal activity	92.7	94.9	-2.1
Revitalize out-dated areas in the City	87.6	90.5	-2.9
Provide business watch programs	88.9	92.3	-3.4
Promote economic development	88.6	92.6	-4.1
Provide building inspection services	90.1	95.1	-4.9
Provide free business consulting services	86.0	91.7	-5.7
Provide business networking events	82.1	92.1	-10.0†
Provide business education events	83.6	94.2	-10.5†
Provide hiring or employee training services	84.4	N/A	N/A

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

The second list of services presented to business managers, shown in Figure 30, relates mostly to maintaining and improving the City’s infrastructure. When asked to rate the importance they assign to each of these services, members of the business community rated maintaining local streets and roads as most important (83%), followed closely by reducing traffic congestion (77%). The other four services—landscaping median strips and other areas of the City (59%), street sweeping (59%), enforcing zoning regulations (51%), and enforcing sign regulations (48%)—were viewed as somewhat less important. As shown in Table 12 on the next page, there were three statistically significant changes in the perceived importance of services between 2014 and 2016 among the six services tested.

**Question 9: Business Survey** *Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.*

**FIGURE 30 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY**



**TABLE 12 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY (2016 ~ 2014)**

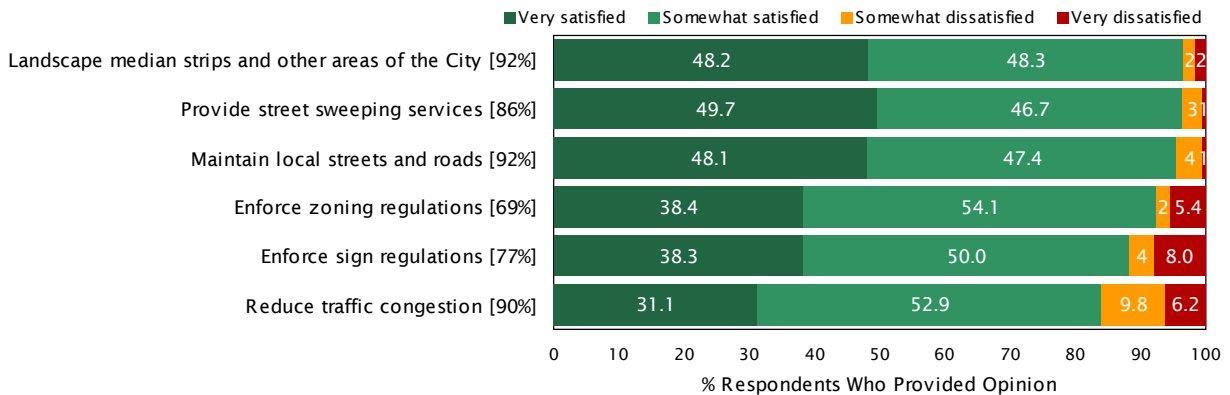
	Study Year		Change in Extremely + Very Important
	2016	2014	
Reducing traffic congestion	77.4	51.5	+25.9†
Landscaping median strips and other areas of the City	59.1	47.8	+11.3†
Maintaining local streets and roads	83.4	80.4	+2.9
Enforcing zoning regulations	51.4	49.0	+2.4
Enforcing sign regulations	47.5	48.9	-1.4
Street sweeping	59.0	76.6	-17.6†

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

Figure 31 presents the overall levels of satisfaction for the same list of infrastructure services tested in the previous question. Satisfaction was greatest with respect to the City’s efforts to landscape median strips and other areas of the City (97%), provide street sweeping services (96%), maintain local streets and roads (96%), and enforce zoning regulations (93%). Although still very positive, the business community was slightly less satisfied with efforts to reduce traffic congestion (84%) and enforce sign regulations (88%). There were no statistically significant changes in satisfaction with the City’s efforts to provide these services between 2014 and 2016 (Table 13).

**Question 10: Business Survey** *Turning to your satisfaction with these same services, would you say that you are satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion?*

**FIGURE 31 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY**



**TABLE 13 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY (2016 ~ 2014)**

	Study Year		Change in Satisfaction
	2016	2014	
Reduce traffic congestion	84.0	77.3	+6.7
Landscape median strips and other areas of the City	96.5	95.2	+1.4
Enforce sign regulations	88.2	87.2	+1.0
Maintain local streets and roads	95.6	95.1	+0.4
Provide street sweeping services	96.4	97.6	-1.2
Enforce zoning regulations	92.5	95.4	-2.9



## PERFORMANCE NEEDS & PRIORITIES

With a measure of the importance of a service to respondents as well as a measure of respondents' satisfaction with the City's efforts to provide the service, True North is able to examine the relationship between these two dimensions and identify service areas where the City has the greatest opportunities to improve overall satisfaction—as well as identify for which services the City is meeting, and even exceeding, the vast majority of residents' and businesses' needs.

Rather than rely on sample *averages* to conduct this analysis, True North has developed and refined an *individualized* approach to identifying priorities. This approach is built on the recognition that opinions will vary from resident to resident (and business to business) and that understanding this *variation* is required for assessing how well the City is meeting the needs of its constituents.<sup>3</sup> Table 14 on the next page presents a two-dimensional grid based on the importance and satisfaction scales. The horizontal axis corresponds to the four *importance* response options, whereas the vertical scale corresponds to the four *satisfaction* response options.

The 16 cells within the grid are grouped into one of six categories based on how well the City is meeting, or not meeting, a resident's needs for a particular service. The six groups are as follows:

<i>Exceeding Needs</i>	The City is exceeding a respondent's needs if a respondent is satisfied and the level of expressed satisfaction is higher than the importance the respondent assigned to the service.
<i>Meeting Needs, Moderately</i>	The City is moderately meeting a respondent's needs if the respondent is satisfied and the level of satisfaction is commensurate with the level of importance assigned to the service.
<i>Meeting Needs, Marginally</i>	The City is marginally meeting a respondent's needs if the respondent is satisfied with the City's efforts to provide the service, but their level of satisfaction is lower than the level of importance assigned to the service.
<i>Not Meeting Needs, Marginally</i>	The City is marginally <i>not</i> meeting a respondent's needs if the respondent is somewhat dissatisfied, but the service is also viewed as just somewhat or not at all important.
<i>Not Meeting Needs, Moderately</i>	The City is moderately <i>not</i> meeting a respondent's needs if a) a respondent is very dissatisfied with the City's efforts to provide the service, but the service is viewed just somewhat or not at all important, or b) a respondent is somewhat dissatisfied and the service is viewed as very important.

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3. Any tool that relies solely on the opinions of the average respondent will provide a limited and occasionally distorted picture of how well an agency is performing. The simple fact is that a City is not comprised of *average* residents or business managers—it is comprised of unique individuals who vary in their opinions of the City's performance in different service areas. Thus, although the arithmetic average of these individuals' opinions is a useful statistic, it does not capture the variation in opinions that occurs among residents, and it is this variation that is critical for truly assessing how well the City is meeting the needs of its constituents.

*Not Meeting Needs, Severely*

The City is severely *not* meeting a respondent’s needs if a) a respondent is dissatisfied and the service is viewed as extremely important, or b) a respondent is very dissatisfied and the service is viewed as very important.

TABLE 14 NEEDS & PRIORITY MATRIX

		Importance			
		Not at all important	Somewhat important	Very important	Extremely important
Satisfaction	Very satisfied	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
	Somewhat satisfied	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, marginally
	Somewhat dissatisfied	Not meeting needs, marginally	Not meeting needs, marginally	Not meeting needs, moderately	Not meeting needs, severely
	Very dissatisfied	Not meeting needs, moderately	Not meeting needs, moderately	Not meeting needs, severely	Not meeting needs, severely

Using this framework, True North categorized each respondent individually for each of the services tested in the study. Thus, for example, a respondent who indicated that reducing traffic congestion was somewhat important and they were very satisfied with the City’s efforts in this service area would be categorized in the *exceeding needs* group for this service. The same respondent may be grouped in the *marginally not meeting needs* group for another service—e.g., maintaining local streets and roads—if they were somewhat dissatisfied with the City’s efforts to provide the service, but the service was viewed as only somewhat important.

Figure 32 presents each of the 33 services tested with residents, along with the percentage grouped into each of the six possible categories. Figure 33 provides the same information for the 17 services tested with the business community. For ease of interpretation, the color-coding in both figures is consistent with that presented in Table 14 above. Thus, for example, in the service area of reducing traffic congestion on City streets, the City is exceeding the needs of 4% of residents, moderately meeting the needs of 24% of residents, marginally meeting the needs of 36% of residents, marginally not meeting the needs of 1% of residents, moderately not meeting the needs of 8% of residents, and severely not meeting the needs of 28% of residents.

Operating from the management philosophy that, all other things being equal, the City should focus on improving those services that have the highest percentage of residents and businesses for which the City is currently *not* meeting their needs, the services have been sorted in order of priority in Figures 32 and 33. For the majority of services tested, the City is meeting the needs of at least 85% of residents and businesses. For residents, reducing traffic congestion, enforcing zoning regulations, and providing animal control services are the top priorities for improvement. Among businesses, providing business networking events, business education events, and reducing traffic congestion topped the list.

FIGURE 32 SERVICE NEEDS: RESIDENT SURVEY

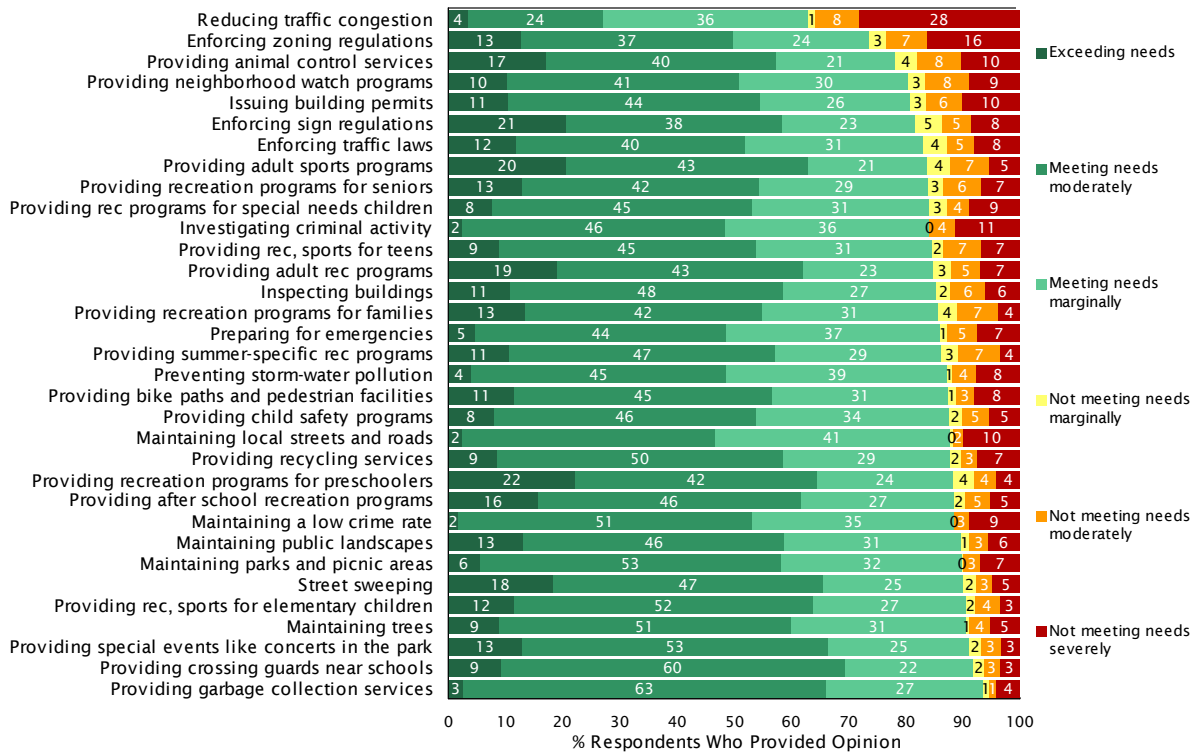
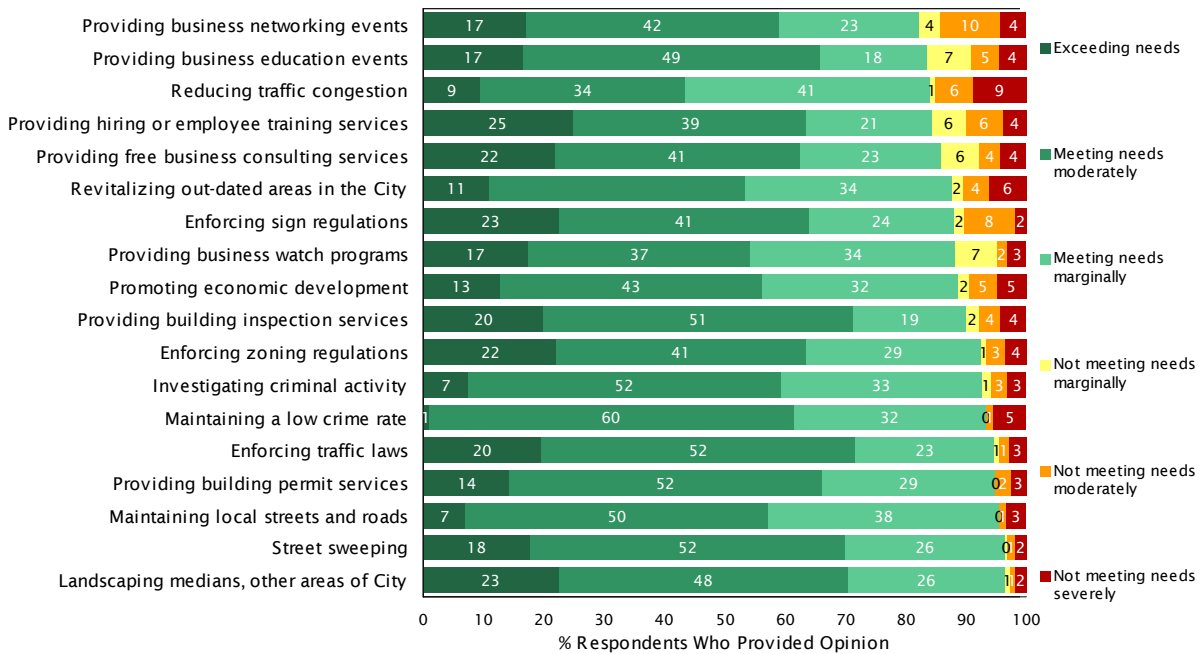


FIGURE 33 SERVICE NEEDS: BUSINESS SURVEY





# RECREATION

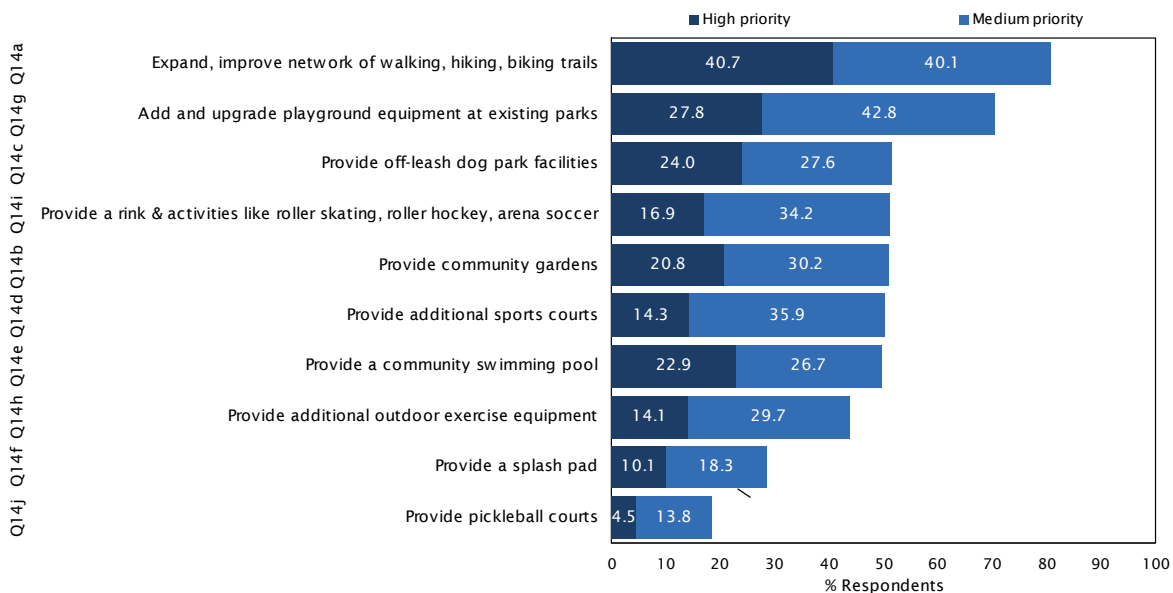
It is often the case that residents' needs for public facilities and programs exceed a city's financial resources. In such cases, a city must prioritize projects and programs based upon a variety of factors, including the preferences of its residents.

Question 14 was designed to provide Lake Forest with a reliable measure of how residents prioritize a variety of parks and recreation-related projects and services to which the City could allocate resources in the future. The format of the question was straightforward: after informing respondents that the City has the financial resources to provide *some* of the recreational amenities and facilities desired by residents, but not all, respondents were asked whether each project or program shown in Figure 34 should be a high, medium, or low priority for future funding, or if the City should not spend money on the project at all. To avoid a systematic position bias, the projects were tested in a random order for each respondent.

The projects and programs are sorted in Figure 34 from high to low based on the percentage of respondents who indicated that an item was *at least* a medium priority for future funding. Among the projects tested, residents assigned the highest priority to expanding and improving the network of walking, hiking, and biking trails (81% high or medium priority), and adding and upgrading playground equipment at existing parks (71%). At the other end of the spectrum, residents assigned substantially lower priority ratings to providing pickleball courts (18%), a splash pad (28%), and additional outdoor exercise equipment (44%).

**Question 14: Resident Survey** *The City of Lake Forest has the financial resources to provide some of the recreational amenities and facilities desired by residents. Because it can't fund every project, however, the City must set priorities. As I read each of the following items, I'd like you to indicate whether you think the City should make the item a high priority, a medium priority, or a low priority for future City spending. If you feel the City should not spend any money on this item, just say so. Please keep in mind that not all of the items can be high priorities.*

**FIGURE 34 RECREATION PRIORITIES: RESIDENT SURVEY**



**TABLE 15 RECREATION PRIORITIES: RESIDENT SURVEY BY STUDY YEAR**

	Study Year		Change in High + Medium Priority
	2016	2014	
Provide a splash pad	28.5	19.7	+8.8†
Expand, improve network of walking, hiking, biking trails	80.8	74.9	+5.9†
Provide a rink & activities like roller skating, roller hockey, arena soccer	51.1	48.4	+2.7
Provide community gardens	51.0	51.7	-0.7
Provide additional outdoor exercise equipment	43.8	45.8	-2.0
Add and upgrade playground equipment at existing parks	70.5	72.7	-2.1
Provide additional sports courts	50.2	52.9	-2.7
Provide off-leash dog park facilities	51.7	56.1	-4.4
Provide a community swimming pool	49.6	54.4	-4.8
Provide pickleball courts	18.3	0.0	N/A

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

For the interested reader, Table 15 shows how the priority ratings in 2016 compared to those recorded in 2014, whereas tables 16 and 17 show how the percentage of residents who rated each project or program as a *high* priority in 2016 varied by age, presence of a child in the home, and area of residence in the City.

**TABLE 16 RECREATION PRIORITIES: RESIDENT SURVEY BY AGE & CHILD IN HOME (SHOWING % HIGH PRIORITY)**

	Age					Child in Home (QD2)	
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older	Yes	No
Expand, improve network of walking, hiking, biking trails	44.5	51.9	34.5	41.9	33.9	47.3	36.3
Add and upgrade playground equipment at existing parks	25.8	34.7	28.5	24.9	28.6	44.4	17.9
Provide off-leash dog park facilities	22.5	30.7	26.7	22.9	20.9	24.9	23.3
Provide a community swimming pool	17.6	25.7	22.9	23.5	24.0	30.1	18.9
Provide community gardens	24.9	24.5	11.0	21.3	21.4	24.5	18.8
Provide a rink & activities like roller skating, roller hockey, arena soccer	12.9	19.8	27.5	15.3	13.1	27.8	10.5
Provide additional sports courts	16.8	13.8	13.0	13.2	15.3	20.4	10.9
Provide additional outdoor exercise equipment	14.1	13.1	13.8	13.6	15.7	16.6	12.5
Provide a splash pad	7.6	25.5	10.2	7.4	6.6	18.9	4.9
Provide pickleball courts	4.7	3.8	3.1	6.1	3.1	5.5	3.7

**TABLE 17 RECREATION PRIORITIES: RESIDENT SURVEY BY AREA OF CITY (SHOWING % HIGH PRIORITY)**

	Area of City			
	One	Two	Three	Four
Expand, improve network of walking, hiking, biking trails	39.7	36.9	43.9	40.8
Add and upgrade playground equipment at existing parks	31.7	31.3	25.0	24.4
Provide off-leash dog park facilities	23.0	21.0	29.1	20.9
Provide a community swimming pool	24.1	24.2	20.2	23.8
Provide community gardens	16.2	23.1	21.6	22.1
Provide a rink & activities like roller skating, roller hockey, arena soccer	16.1	20.8	15.3	16.3
Provide additional sports courts	20.0	16.5	11.3	10.6
Provide additional outdoor exercise equipment	13.8	14.8	12.6	15.8
Provide a splash pad	10.2	12.1	10.6	7.6
Provide pickleball courts	4.6	6.7	3.2	4.2

# TRAFFIC

In nearly all southern California cities, traffic congestion ranks among the most pressing problems that residents would like local and regional governments to address. As noted previously in this report (see Figure 8 on page 17), a reduction in traffic congestion was the most frequently mentioned specific improvement that residents feel is needed to make Lake Forest a better place to live.

**TRAFFIC IN AND AROUND LAKE FOREST** To drill deeper on this issue, the 2014 and 2016 surveys asked residents to indicate on what percentage of their trips they encounter bad traffic congestion for each of three general areas: Orange County freeways, major streets within the City, and residential areas within the City. As shown in Figure 35, residents reported that, on average, they encounter bad traffic on Orange County freeways on more than half (59%) of their trips. Trips on major streets in the City were somewhat better, with an average of 43% involving bad congestion, compared with roughly 16% of trips in residential areas of the City.

**Question 15: Resident Survey** *Next, I'd like to ask you about traffic congestion. When you are driving: \_\_\_\_\_, about what percentage of your trips do you encounter bad traffic congestion? If needed: Zero percent means you never encounter bad traffic congestion, whereas 100% means you always encounter bad traffic. You can use any number between 0 and 100.*

**FIGURE 35 AVERAGE FREQUENCY OF ENCOUNTERING BAD TRAFFIC CONGESTION: RESIDENT SURVEY BY STUDY YEAR**

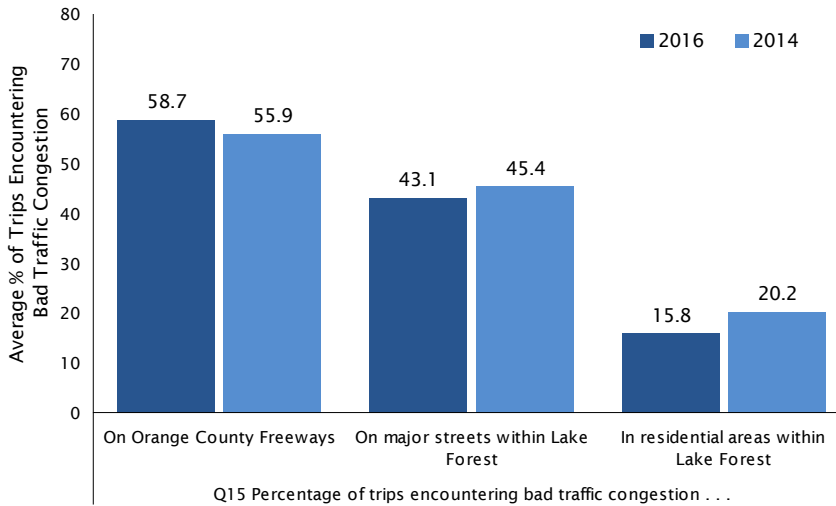
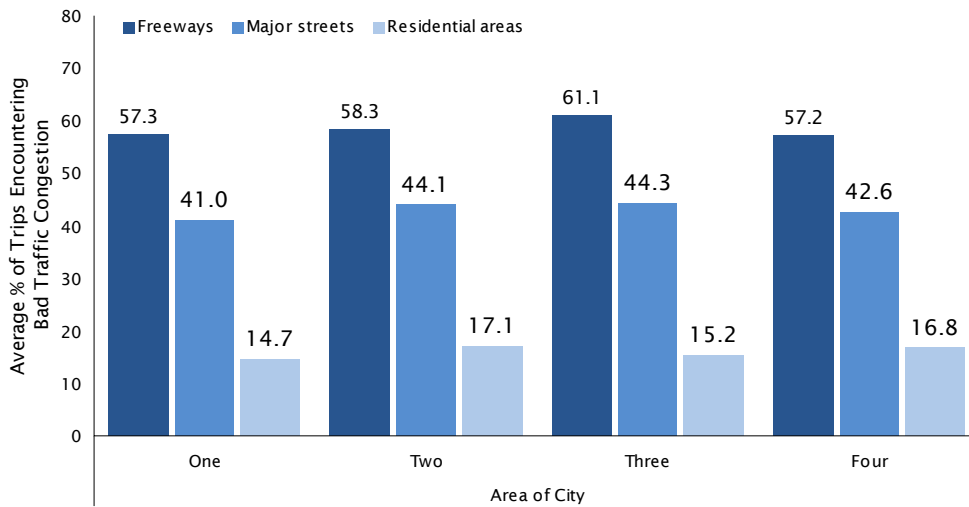


Figure 36 on the next page presents the results of this question by the area of the City in which the resident resides, showing the average percentage of trips that involve bad traffic congestion. The reported average percentage of trips with bad congestion on Orange County freeways, major streets in the City, and in residential areas was strikingly similar when respondents were separated according to the area of Lake Forest in which they live.

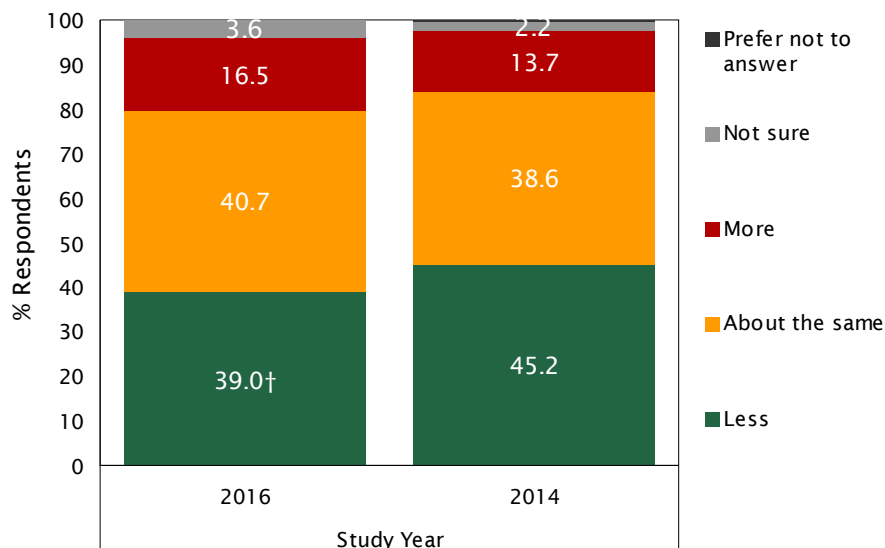
**FIGURE 36 AVERAGE FREQUENCY OF ENCOUNTERING BAD TRAFFIC CONGESTION: RESIDENT SURVEY BY AREA OF CITY**



**TRAFFIC COMPARED WITH OTHER ORANGE COUNTY CITIES** As a follow-up to Question 15, residents were asked to compare traffic circulation in Lake Forest with that in other cities in Orange County. As shown in Figure 37 below, most residents (80%) felt that Lake Forest has either less (39%) or about the same amount (41%) of traffic congestion as neighboring Orange County cities. A minority (17%) of residents surveyed felt that Lake Forest has more congestion than other Orange County cities, whereas 4% were unsure or unwilling to answer the question. When compared to 2014, the 2016 survey results had significantly fewer respondents who perceived Lake Forest to have less traffic than other Orange County cities.

**Question 16: Resident Survey** *When compared to traffic congestion in other Orange County cities, would you say that the amount of traffic congestion within Lake Forest is less, about the same, or more?*

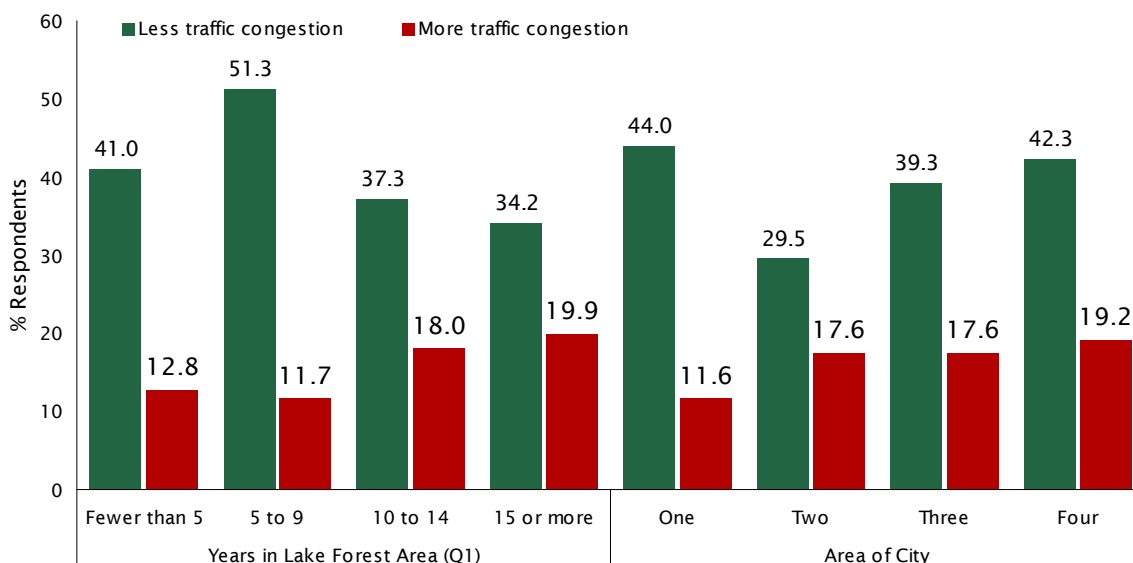
**FIGURE 37 TRAFFIC CONGESTION COMPARED WITH OTHER ORANGE COUNTY CITIES: RESIDENT SURVEY BY STUDY YEAR**



† Statistically significant difference ( $p < 0.05$ ) between the 2014 and 2016 studies.

For the interested reader, Figure 38 provides the responses to this question by the respondents' length of residence and area of the City. Those who had lived in the City of Lake Forest 15 years or longer and those who live in Area 2 were the least likely to perceive Lake Forest to have less traffic congestion than other Orange County cities.

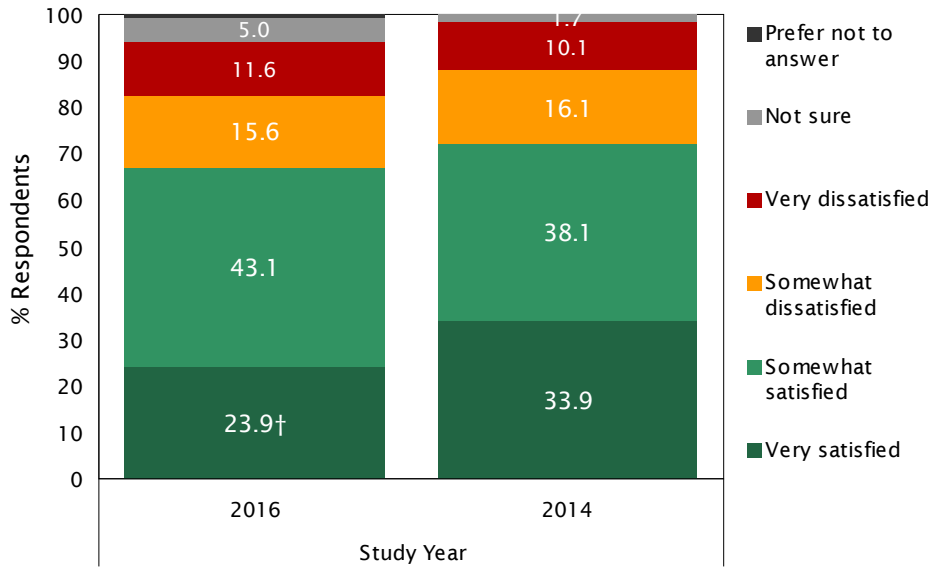
**FIGURE 38 TRAFFIC CONGESTION COMPARED WITH OTHER ORANGE COUNTY CITIES: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & AREA OF CITY**



**SATISFACTION WITH EFFORTS TO IMPROVE CIRCULATION** The Lake Forest Traffic Division and the City's Engineering Services work together to address day-to-day traffic operations, safety issues, and future transportation needs for the City of Lake Forest. The next question in this section of the survey asked respondents about their satisfaction with City *efforts* to improve traffic circulation. Figure 39 on the next page shows that two-thirds of residents indicated they were very (24%) or somewhat (43%) satisfied with the City's efforts to improve circulation, whereas approximately one-quarter were very (12%) or somewhat (16%) dissatisfied. When compared to the 2014 survey results for the same question, the percentage who indicated they were very satisfied was significantly lower in 2016. Figure 40 provides the responses to Question 17 by the respondents' length of residence, area of the City in which they reside, and their opinion of how traffic in Lake Forest compares to other Orange County cities.

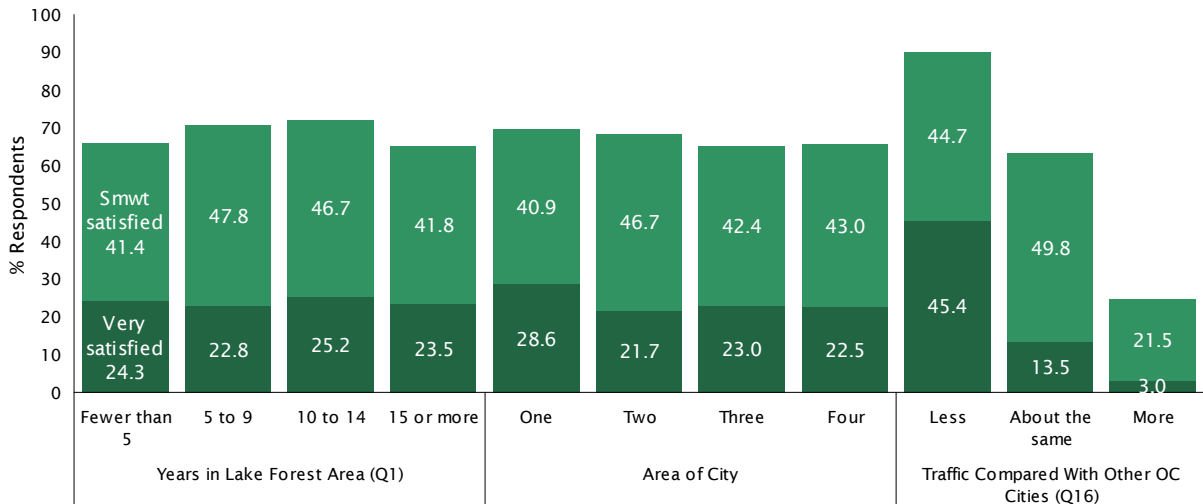
**Question 17: Resident Survey** *Generally speaking, are you satisfied or dissatisfied with the City's efforts to improve traffic circulation by improving roads and intersections, timing traffic signals, and other measures?*

**FIGURE 39 SATISFACTION WITH CITY EFFORTS TO IMPROVE TRAFFIC CIRCULATION: RESIDENT SURVEY BY STUDY YEAR**



† Statistically significant difference ( $p < 0.05$ ) between the 2014 and 2016 studies.

**FIGURE 40 SATISFACTION WITH CITY EFFORTS TO IMPROVE TRAFFIC CONGESTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & TRAFFIC COMPARED WITH OTHER OC CITIES**

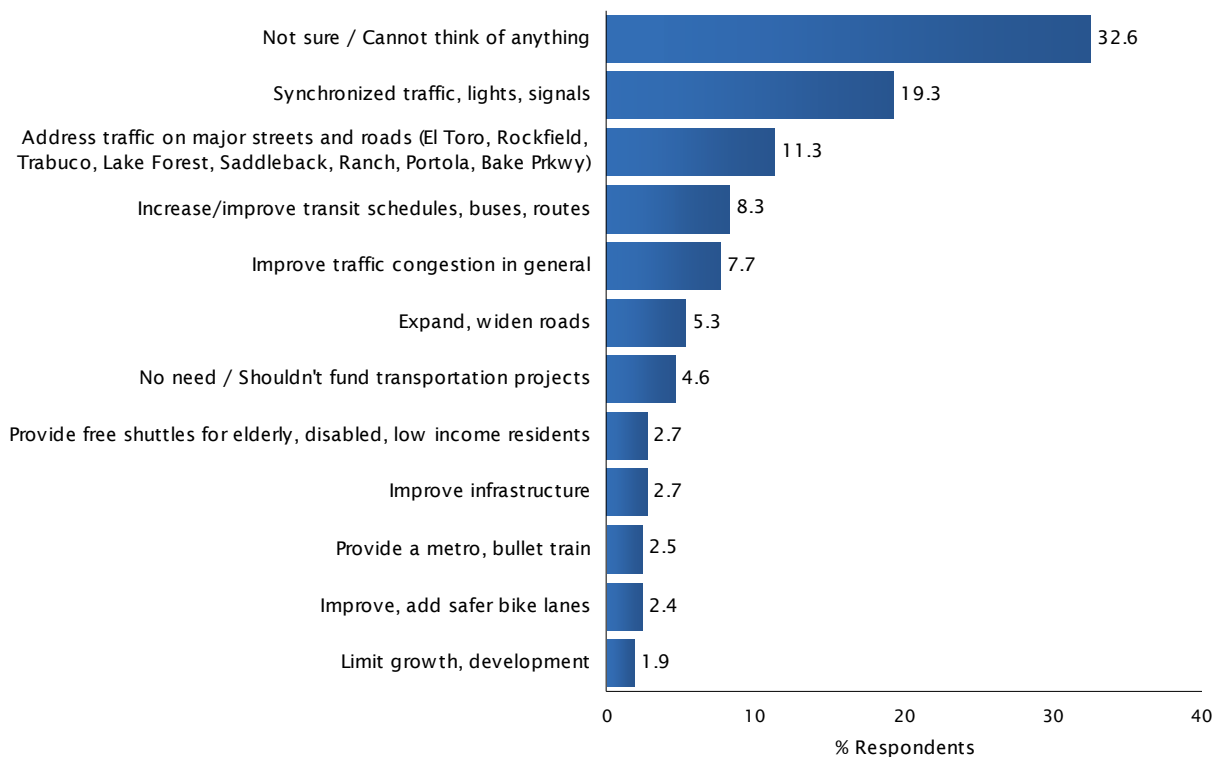


**MOST DESIRED TRAFFIC OR TRANSPORTATION PROJECT** The final question of this series asked residents if the City could fund only one traffic or transportation-related project, what should it be? The question was asked in an open-ended manner, allowing respondents to mention any project that came to mind without being prompted by or restricted to a particular list of options. The responses were later grouped into the categories presented in Figure 41.

One-third (33%) of respondents were unsure or could not think of a traffic or transportation-related project to fund. Synchronizing traffic signals (19%) and addressing traffic on major streets in the City (11%) were the most common specific suggestions, followed by increasing/improving transit schedules, routes and/or bus frequency (8%) and addressing traffic congestion in general (8%). An additional 5% of residents surveyed said the City should not fund any transportation projects.

**Question 18: Resident Survey** *If the City could fund only one traffic or transportation-related project, what should it be? Please be specific.*

**FIGURE 41 DESIRED TRAFFIC, TRANSPORTATION PROJECTS: RESIDENT SURVEY**



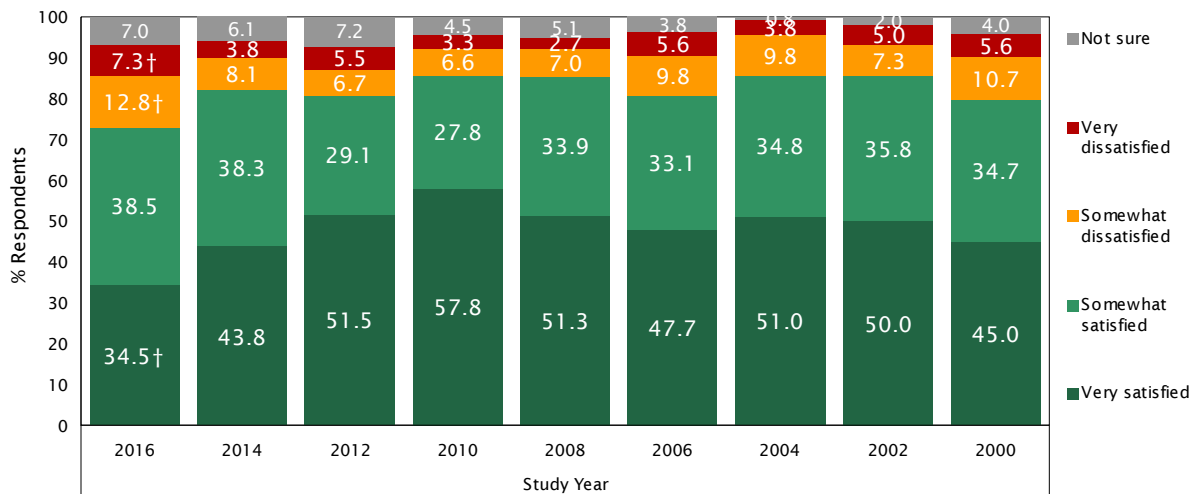
# COMMUNICATION

The importance of city communication with residents and local businesses cannot be overstated. Much of a city’s success is shaped by the quality of information that is exchanged in both directions, from the city to the community and from the community to the city. This study is just one example of Lake Forest’s efforts to enhance the information flow to the City to better understand the community’s concerns, perceptions, and needs. Some of Lake Forest’s many efforts to communicate with its residents and local business community include its newsletters, timely press releases, and its various websites. In this section of the report, we present the results of several communication-related questions from the resident and business surveys.

**SATISFACTION WITH COMMUNICATION EFFORTS** Residents and businesses were asked to report their overall satisfaction with the City’s efforts to communicate with them through newsletters, the Internet, social media, and other means. Overall, 73% of residents indicated that they were either very (35%) or somewhat (39%) satisfied with the City’s communication efforts, which is significantly lower than the rating recorded in 2014 (Figure 42).

**Question 19: Resident Survey** *Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means?*

**FIGURE 42 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY (2016 ~ 2000)**

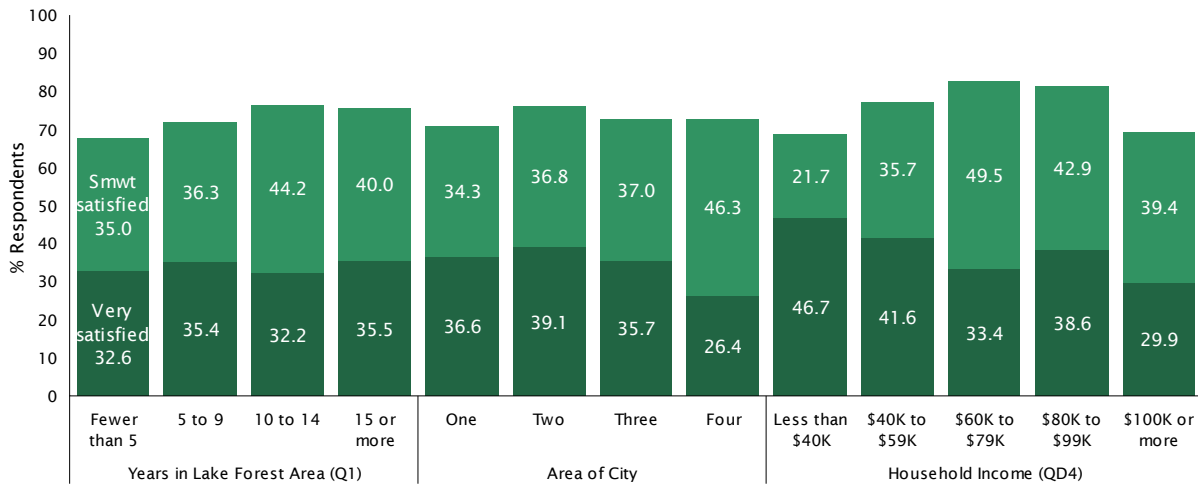


† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

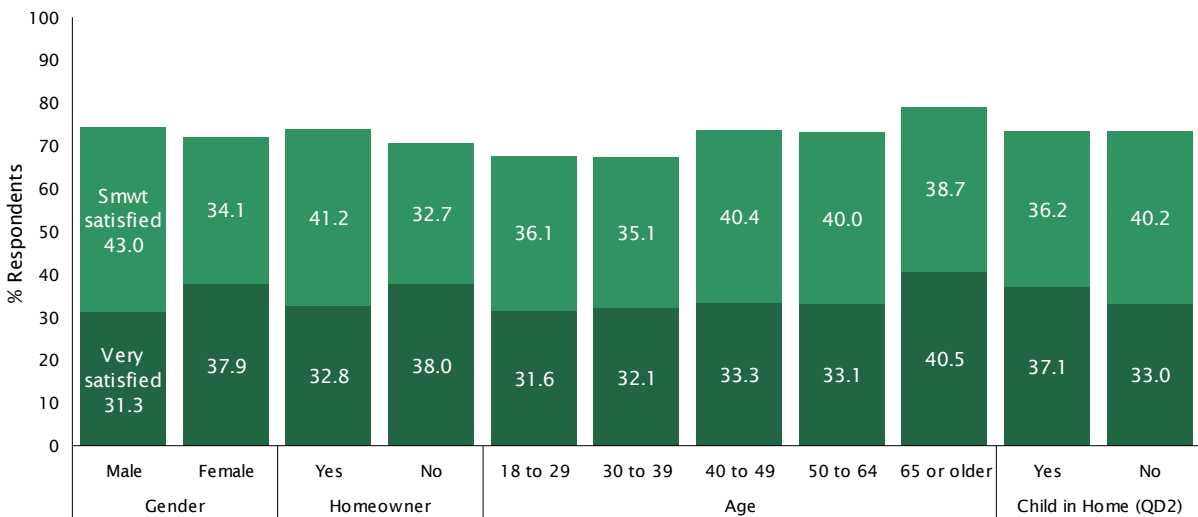
At the subgroup level, at least two-thirds of residents in each demographic segment were satisfied with the City’s communication efforts, with seniors and those earning between \$60,000 and \$99,999 annually expressing the highest levels of satisfaction (see figures 43 and 44 on the next page).



**FIGURE 43 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & HOUSEHOLD INCOME**



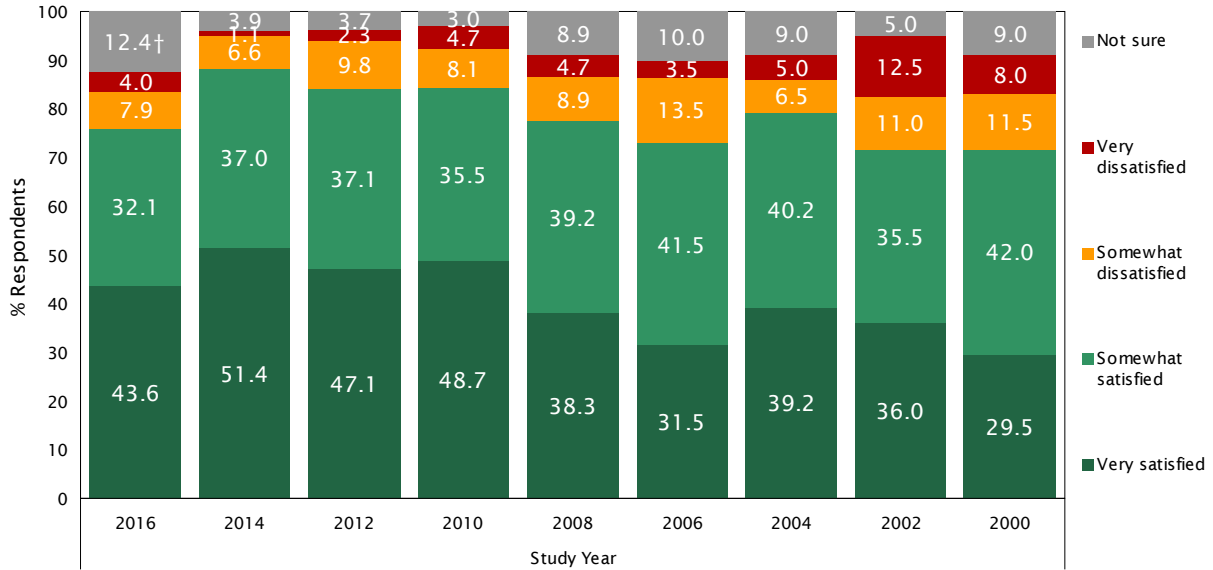
**FIGURE 44 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY GENDER, HOMEOWNER, AGE & CHILD IN HOME**



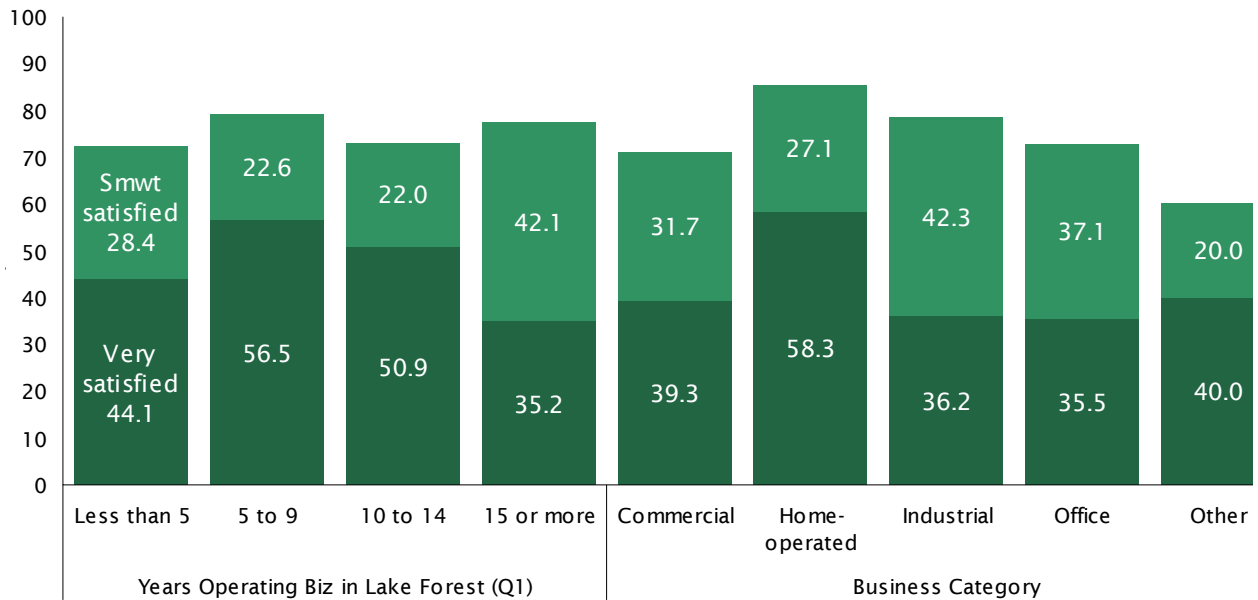
Among local businesses, 76% of business managers surveyed in 2016 indicated that they were satisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means, 12% said they were dissatisfied, whereas those who were unsure (12%) increased significantly when compared to 2014 (Figure 45). For the interested reader, figures 46 and 47 show how satisfaction varied across several business subgroups.

**Question 11: Business Survey** Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means?

**FIGURE 45 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY (2016 ~ 2000)**



**FIGURE 46 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST & BUSINESS CATEGORY**



**FIGURE 47 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES & EMPLOYEES OUTSIDE LAKE FOREST**



Among business managers who were dissatisfied with the City’s communication efforts, Question 12 asked if there was a particular reason for their dissatisfaction. Because so few respondents were dissatisfied with communication *and* provided a reason for their dissatisfaction, the specific verbatim responses are shown below. Most respondents mentioned that they don’t recall receiving information from the City as the reason for their dissatisfaction.

**Question 12: Business Survey** *Is there a particular reason why you are dissatisfied with the City's efforts to communicate with local businesses? Please be specific.*

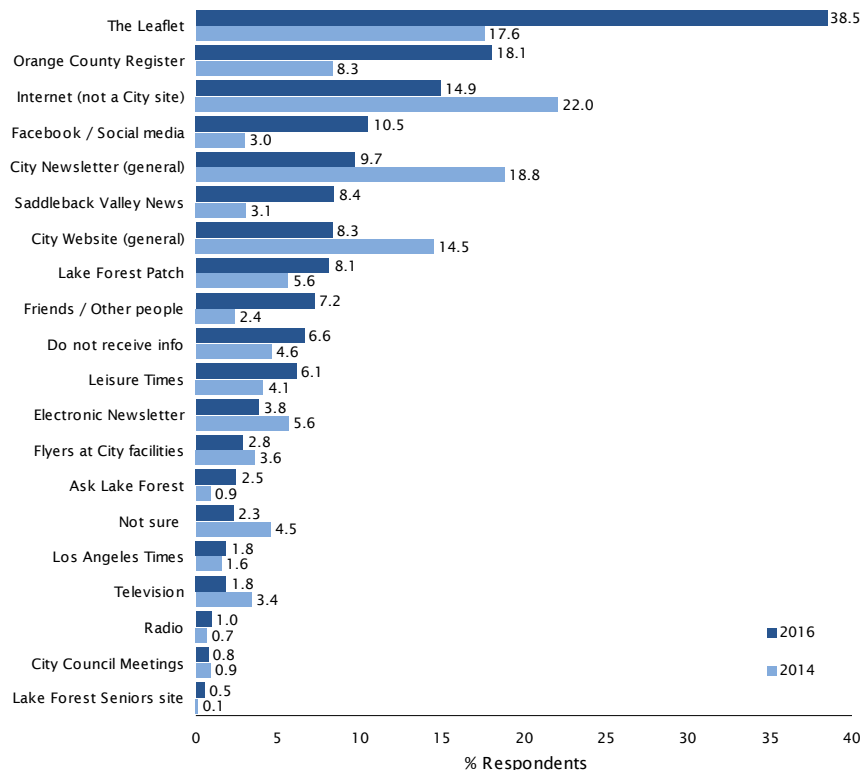
- I can not remember receiving any information?
- I didn't receive any.
- I don't even see any forms of communication.
- I don't recall being contacted.
- I don't think they reach out to all businesses in Lake Forest. There could be a particular focus on the restaurant.
- I feel there is a need for communication, and they only communicate with the business when the city wants something.
- I have been in this location for a year, but I have not seen any printed material sent to us.
- I have never received a correspondence reference in newsletters for outreach.
- I have no clue on what they are actually doing or what services they provide.
- I never receive any newsletter or anything from them.
- I'd like to be much more in the loop with this great city.
- It is because I don't even have any knowledge at all on those programs or services they offer to businesses.
- It is because I don't have any idea what they are doing.
- It is because they are not communicating with us, but it would be nice if they will communicate with us even in newsletters or direct mail.

- LF needs to be more aggressive in connecting with businesses because as we grow, so does the city.
- The city doesn't take enough effort to communicate with businesses and they can do a lot more in order to improve.
- The more they have meetings and gatherings, the more we can interact with each other and make Lake Forest a better place to live.
- Their fees, in the Chamber of Commerce, are too high. They need to cut that into half or less. They need to be more inviting and more flexible. There was this guy with handcuffs, like I'm a criminal.
- There is business favoritism.
- There is lack of communication to businesses.
- We don't receive any communications from the city itself.
- We haven't received any communications from the City.
- Yeah, I haven't gotten ANY of it.

**INFORMATION SOURCES** Residents and businesses were next asked to indicate the sources they use to find out about the City of Lake Forest news, information, and programming. This question was asked in an open-ended format, and respondents were allowed to report up to three sources of information. Thus, the percentages shown in the following figures reflect the percentage of residents and business managers who mentioned a given information source.

**Question 20: Resident Survey** *What information sources do you use to find out about City of Lake Forest news, information and programming?*

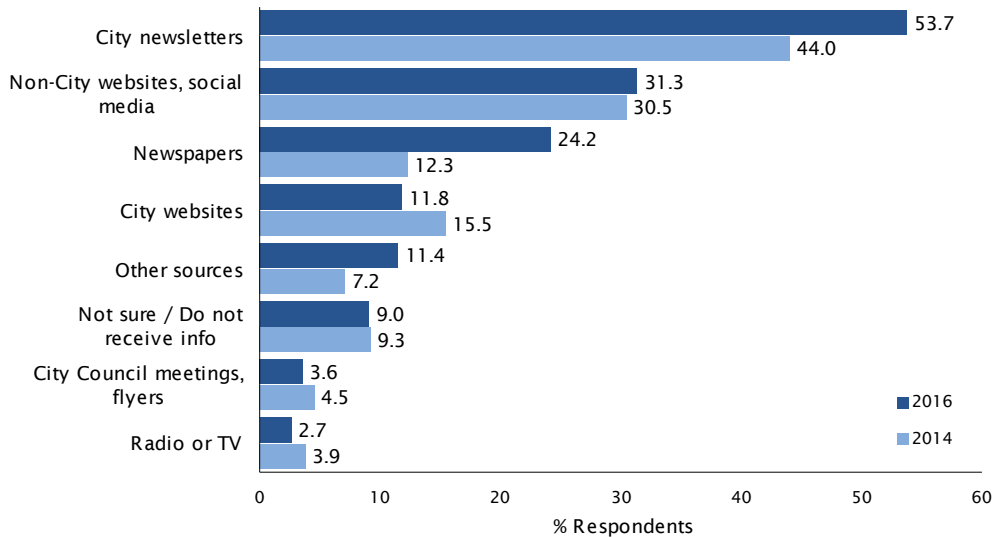
**FIGURE 48 SPECIFIC INFORMATION SOURCES: RESIDENT SURVEY (2016 ~ 2014)**



As presented in Figure 48, the single most frequently cited source of city information among residents in 2016 was the *Leaflet* (39%), followed by the Orange County Register (18%), Internet in general (not the City’s site) (15%), Facebook/Social Media (11%), and the City’s Newsletter (general mention)(10%).

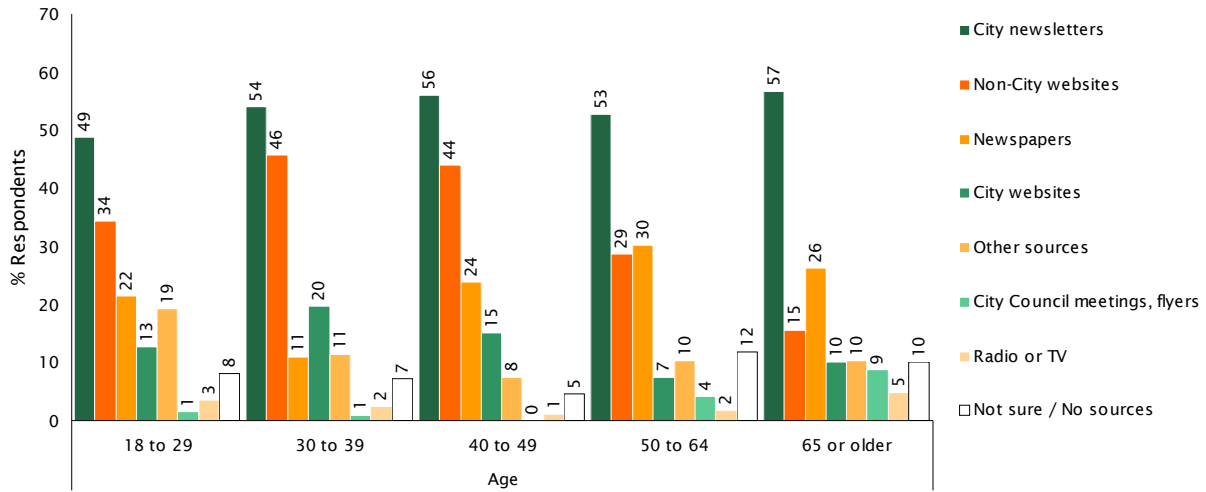
To summarize the wide variety of information sources mentioned and more easily compare the results between years and demographic subgroups, Figure 49 provides the responses to this question, with specific sources grouped into larger meaningful categories. Because survey respondents were allowed to mention multiple sources, the percentages in this figure represent the percentage of residents who mentioned at least one source that fits within each category. As shown in the figure, 54% of residents surveyed in 2016 mentioned at least one of Lake Forest’s newsletters as a source of city information. Thirty-one percent (31%) mentioned a non-City website or social media, and 24% cited a newspaper.

**FIGURE 49 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY (2016 ~ 2014)**

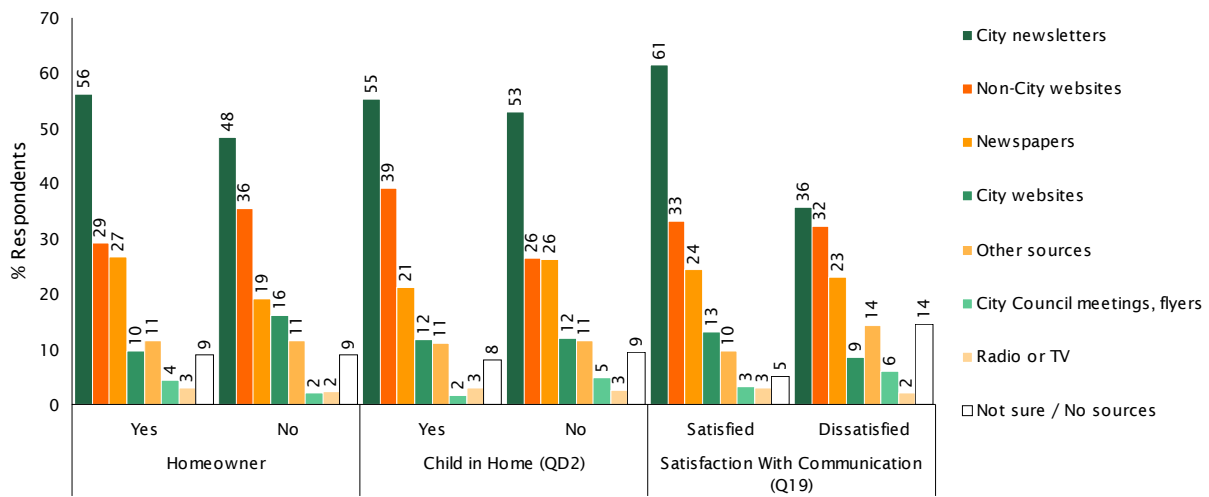


Figures 50 and 51 present the information source categories by age, homeownership status, presence of a child in the home, and satisfaction with the City’s communication efforts. For ease of interpretation, the bars representing City-sponsored sources are displayed in shades of green, and non-City sources in shades of orange. One of the key patterns in the figures is that—when balanced against the other sources—younger residents, renters, those living with children, and those currently dissatisfied with the City’s communication efforts were more likely to rely on non-City websites when compared to their respective counterparts. Moreover, those who reported being dissatisfied with the City’s communication efforts were the least likely to report utilizing the City’s newsletters.

**FIGURE 50 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY AGE**



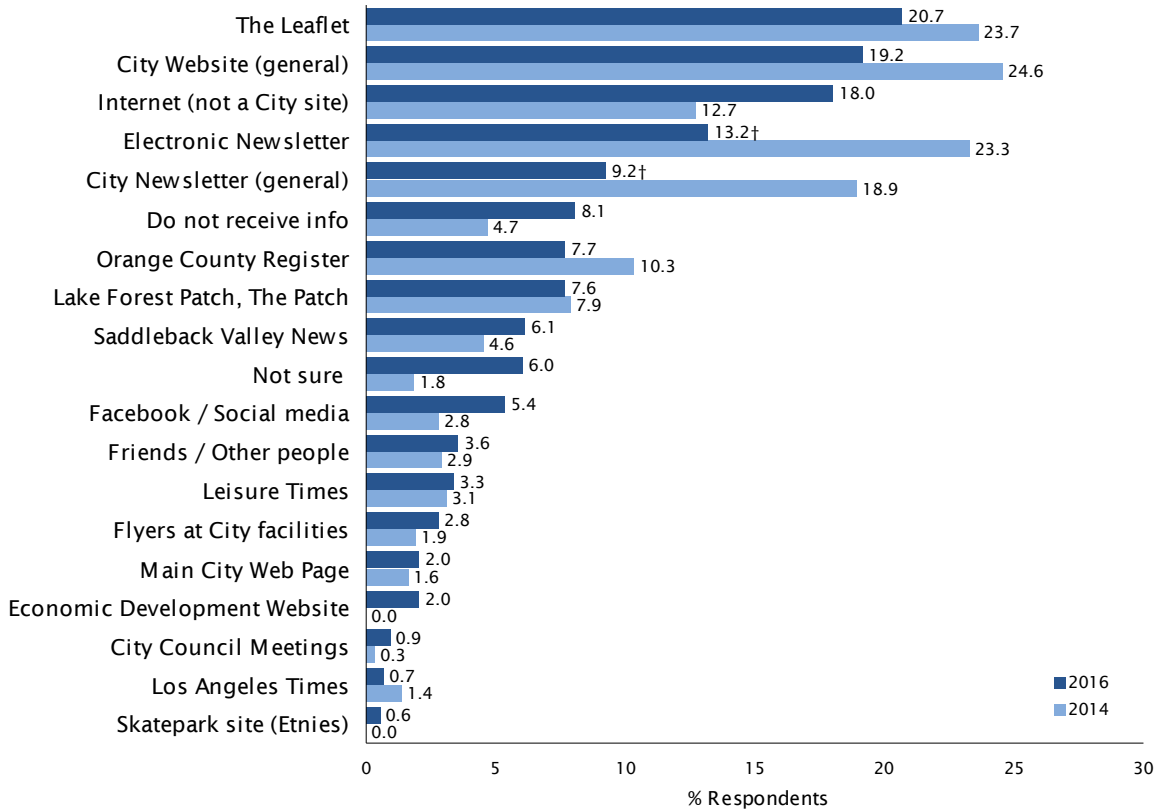
**FIGURE 51 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY HOMEOWNER, CHILD IN HOME & SATISFACTION WITH COMMUNICATION**



As shown in Figure 52 on the next page, when asked what information sources they rely on for Lake Forest news, information, and programming, members of the business community were most likely to mention *The Leaflet* (21%), the City’s website in general (19%), and the Internet in general (18%). Other commonly mentioned sources included the City’s electronic newsletter (13%), a City Newsletter in general (9%), and the *Orange County Register* (8%). When compared with 2014, the percentage of business managers in 2016 who mentioned that they rely on the e-Newsletter decreased significantly (-10%) as did mention of a City Newsletter in general (-10%).

**Question 13: Business Survey** *What information sources do you use to find out about City of Lake Forest news, information and programming?*

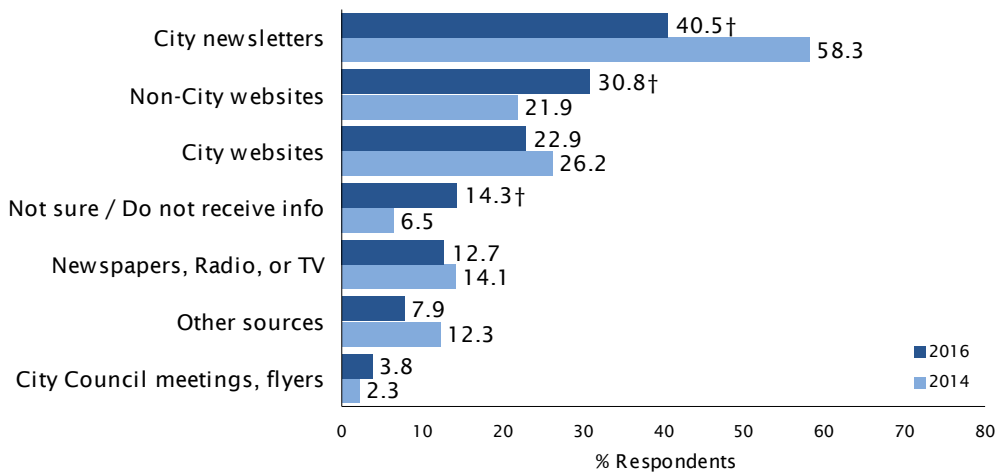
**FIGURE 52 INFORMATION SOURCES: BUSINESS SURVEY (2016 ~ 2014)**



† Statistically significant difference ( $p < 0.05$ ) between the 2014 and 2016 studies.

In the same manner described above for the resident survey, Figure 53 on the next page provides the responses to this question among business managers, with specific sources grouped into larger meaningful categories. Because respondents were allowed to mention multiple sources, the percentages in the figure represent the percentage of businesses that mentioned at least one source within each category. As shown in the figure, 41% of businesses surveyed in 2016 mentioned at least one of Lake Forest’s newsletters as a source of information, which is significantly lower than the 58% found in 2014. On the other hand, mentions of non-City websites and respondents who indicated they were unsure/don’t receive information about Lake Forest increased significantly.

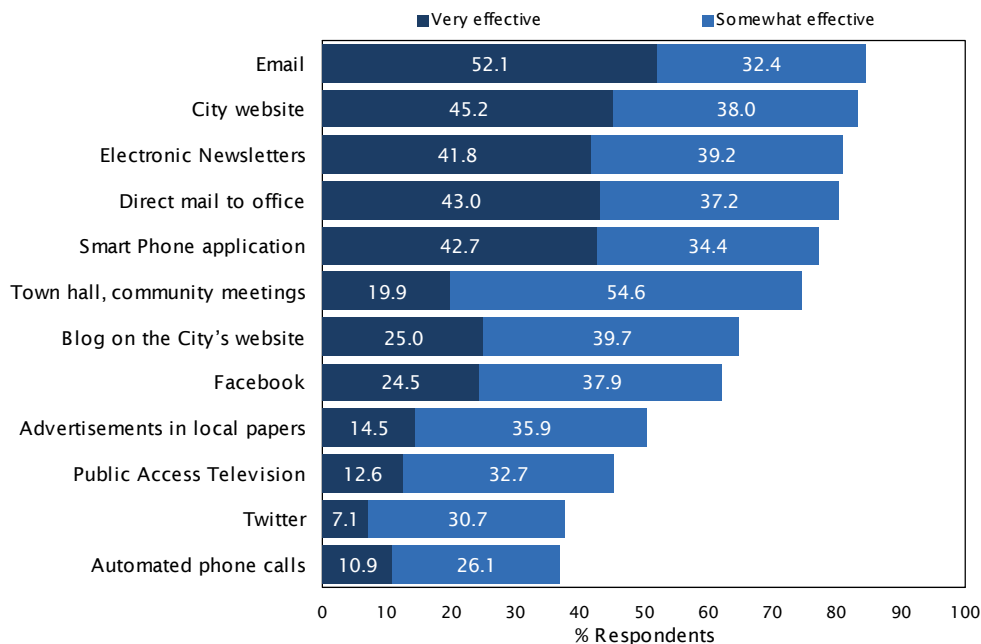
**FIGURE 53 INFORMATION SOURCE CATEGORIES: BUSINESS SURVEY (2016 ~ 2014)**



**EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS** The next communication-related question presented local businesses with each of the methods shown on the left of Figure 54 and asked if each would be an effective way for the City to communicate with them. Overall, respondents indicated that email was the most effective method (85% very or somewhat effective), followed by the City’s website (83%), e-Newsletters (81%), direct mail to their office (80%), and a smart phone application (77%). Automated phone calls (37%), Twitter (38%), and Public Access Television (45%) were rated as the least effective methods.

**Question 14: Business Survey** *As I read the following ways that the City of Lake Forest can communicate with local businesses, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with your business.*

**FIGURE 54 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS**





For the interested reader, Table 18 displays how the percentage of local businesses that rated each method of communication as *very* effective differed by business category and overall satisfaction with the City’s communication efforts.

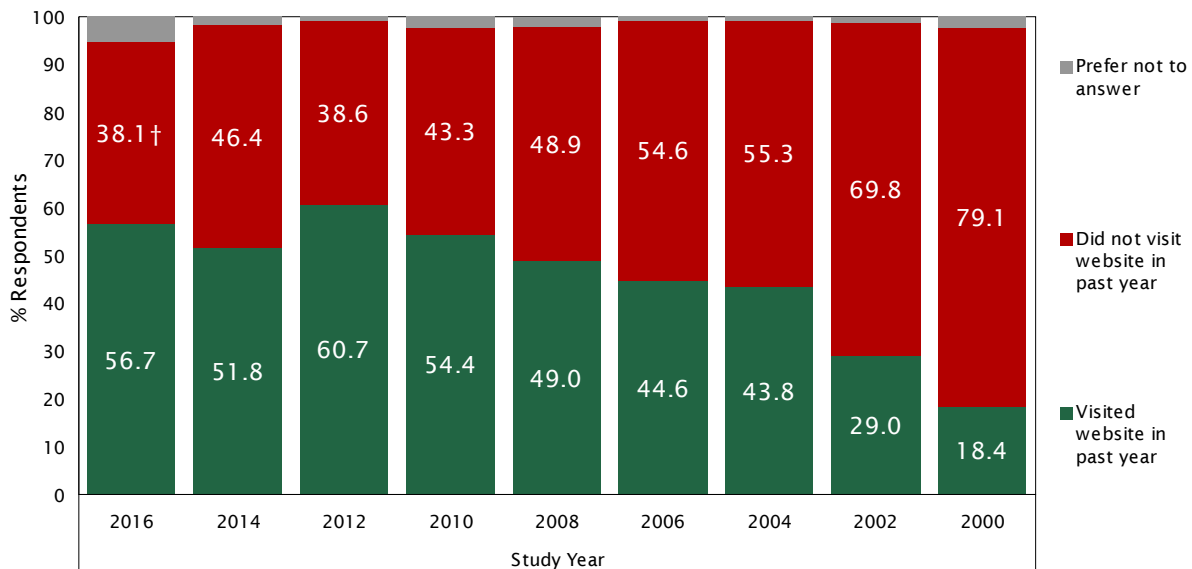
**TABLE 18 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS BY BUSINESS CATEGORY & SATISFACTION WITH COMMUNICATION (SHOWING % VERY EFFECTIVE)**

	Business Category				Satisfaction With Communication (Q11)	
	Commercial	Home-operated	Industrial	Office	Satisfied	Dissatisfied
Email	45.7	60.4	52.3	54.8	57.1	42.0
City website	49.7	47.9	32.4	37.1	48.1	34.8
Direct mail to office	44.8	50.0	41.8	30.6	48.4	43.4
Smart Phone application	51.2	41.7	29.6	41.9	42.8	59.3
Electronic Newsletters	46.0	43.8	32.5	37.1	45.3	48.2
Blog on the City’s website	29.1	29.2	16.3	17.7	27.2	27.5
Facebook	31.3	22.9	22.4	21.0	24.2	35.2
Town hall, community meetings	15.3	31.3	7.1	14.5	22.3	17.2
Advertisements in local papers	16.9	18.8	13.1	8.1	15.7	12.2
Public Access Television	15.9	12.5	7.1	8.1	14.7	5.0
Automated phone calls	12.0	12.5	7.1	6.5	13.1	2.5
Twitter	9.1	8.3	9.2	1.6	6.9	5.2

**CITY WEBSITES** The City of Lake Forest has been a leader among municipalities in developing websites tailored to different subgroups in the community. It is naturally of interest to specifically measure use of the City’s websites, and opinions regarding the content of the sites.

**Question 21: Resident Survey** *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

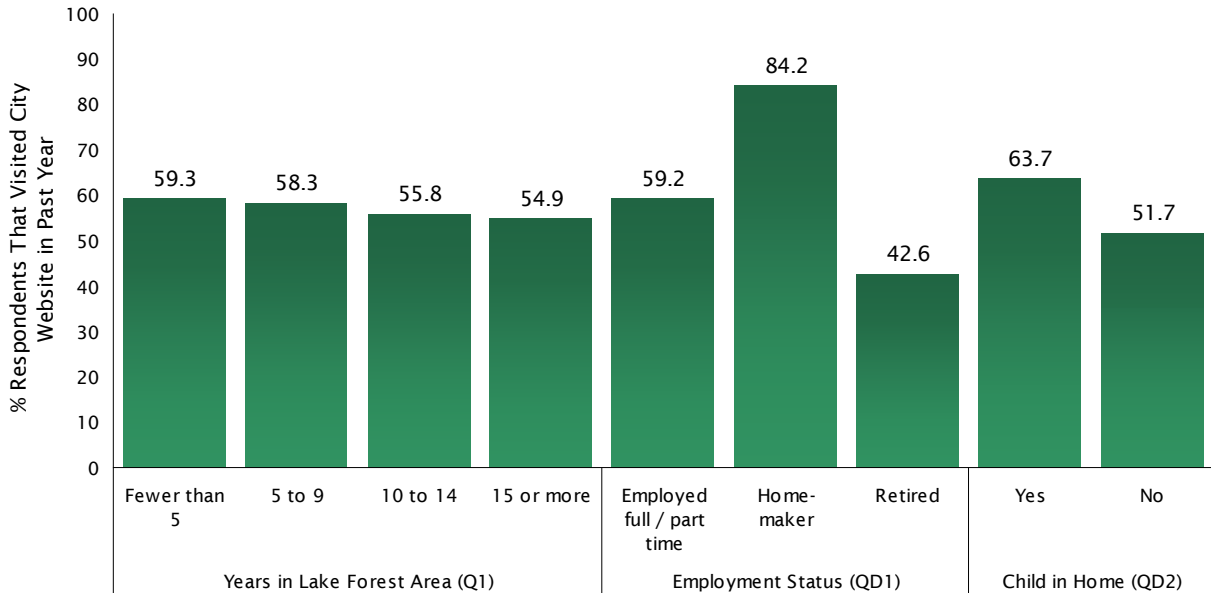
**FIGURE 55 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY (2016 ~ 2000)**



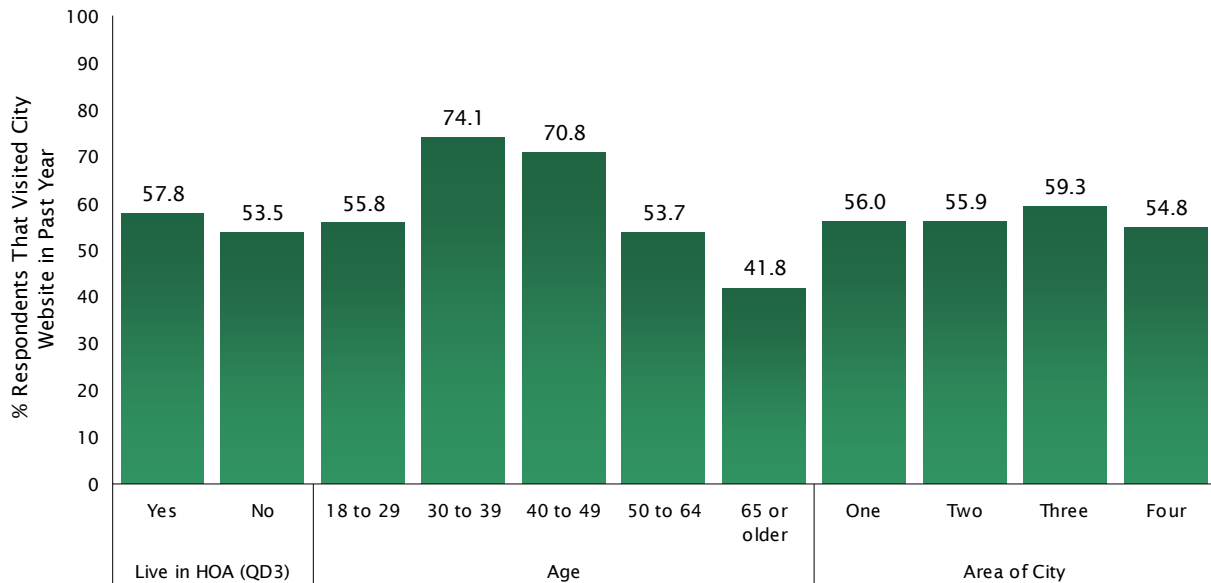
† Statistically significant difference ( $p < 0.05$ ) between the 2014 and 2016 studies.

Figure 55 shows that the percentage of residents who visited the City’s website has grown substantially since the 18% recorded in 2000, with 57% indicating they had visited one or more of the City’s websites in 2016. Figures 56 and 57 show how use of the City’s websites in the past year varied by key resident subgroups.

**FIGURE 56 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, EMPLOYMENT STATUS & CHILD IN HOME**



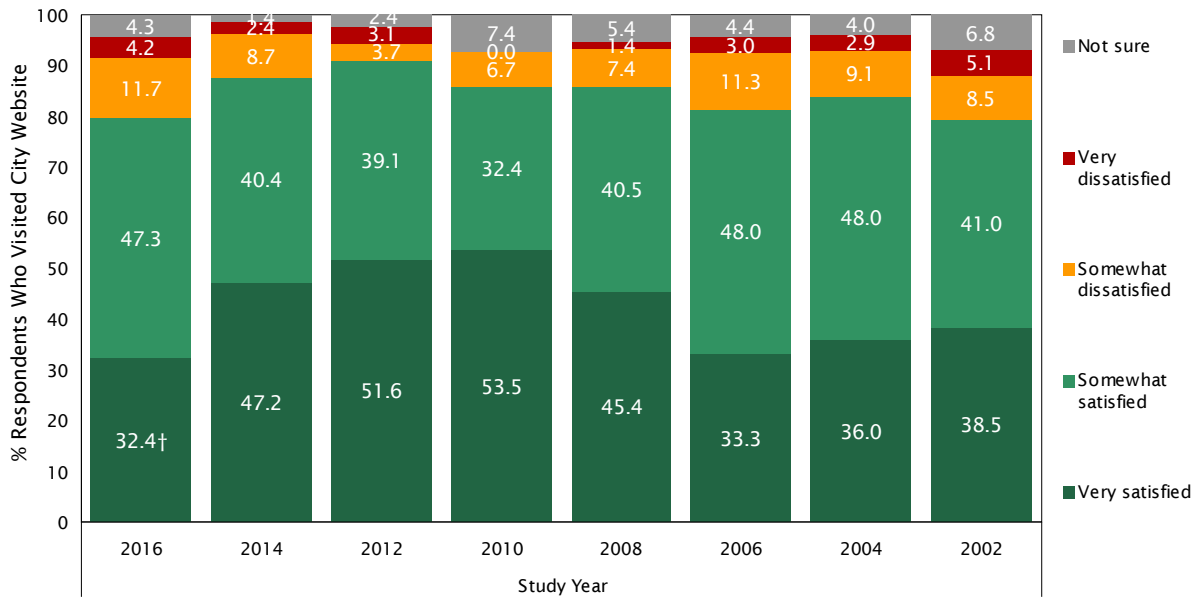
**FIGURE 57 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY LIVE IN HOA, AGE & AREA OF CITY**



**WEBSITE CONTENT** Visitors to the City’s websites were next asked to rate their level of satisfaction with the resources and content available on the sites—the results of which are shown in Figure 58. Overall, visitors expressed high levels of satisfaction with the City’s websites, with 80% of residents indicating they were satisfied with the resources available on the sites. Although overall satisfaction remained high, the percentage of respondents who indicated they were *very* satisfied was significantly lower in 2016.

**Question 22: Resident Survey** *Are you satisfied or dissatisfied with the resources and content available on the City's web sites?*

**FIGURE 58 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY (2016 ~ 2002)**



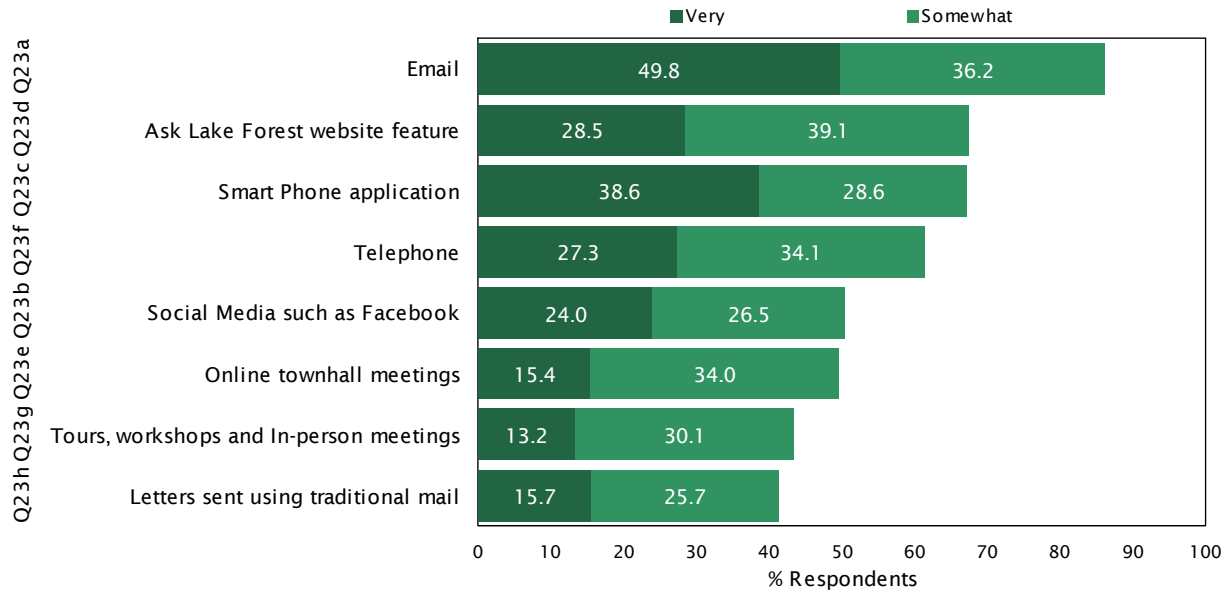
† Statistically significant difference ( $p < 0.05$ ) between the 2014 and 2016 studies.

**METHODS OF COMMUNICATING INFO TO CITY** New to the 2016 survey, Question 23 asked residents how likely they would be to use each of the methods listed in Figure 59 when communicating information to the City of Lake Forest. The communication methods are ranked from high to low in the figure based on the percentage of respondents who stated they would be at least somewhat likely to use the method.

Among the communication methods tested, email received the highest percentage of respondents indicating they would be likely to use the method (86%) when communicating information to the City, followed by the *Ask Lake Forest* website feature (68%), a smart phone application (67%), and telephone (61%). By comparison, residents were less likely to state they would use letters sent via traditional mail (41%), tours, workshops or in-person meetings (43%), online town-hall meetings (49%), and social media (51%) to communicate information to the City of Lake Forest. Table 19 displays how the preferred methods of communicating information to the City of Lake Forest varied by age, presence of a child in the home, and satisfaction with the City’s communication efforts.

**Question 23: Resident Survey** Next let me ask about communication in the other direction. As I read the following ways that could be available for communicating to the City of Lake Forest, please tell me how likely you would be to use this method of communicating with the City.

**FIGURE 59 LIKELIHOOD OF USING COMMUNICATION METHODS**



**TABLE 19 LIKELY HOOD OF USING COMMUNICATION METHODS BY AGE, CHILD IN HOME & SATISFACTION WITH COMMUNICATION (SHOWING % VERY LIKELY)**

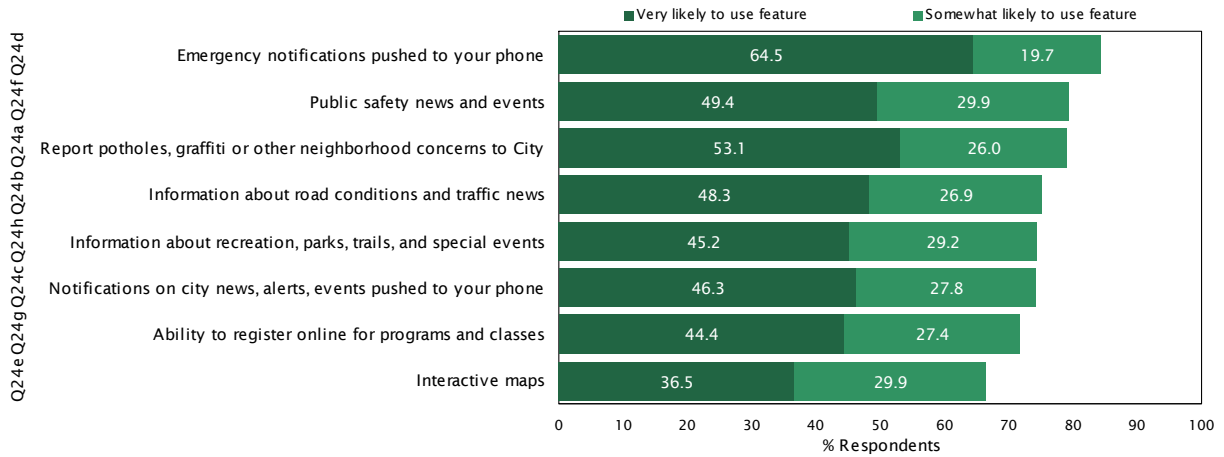
	Age					Child in Home (QD2)		Satisfaction with Communication (Q19)	
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older	Yes	No	Satisfied	Dissatisfied
Email	41.8	60.6	66.1	43.1	47.2	54.4	46.9	51.0	52.2
Smart Phone application	42.2	50.7	50.8	37.6	22.1	43.3	36.0	38.1	40.6
Ask Lake Forest website feature	27.4	29.9	27.2	28.1	29.6	27.4	28.8	30.8	23.0
Telephone	24.5	16.1	22.2	26.7	40.1	24.9	28.7	29.7	22.2
Social Media such as Facebook	30.8	41.3	32.3	17.7	12.2	30.5	20.3	23.9	27.7
Letters sent using traditional mail	11.6	10.2	10.5	14.6	26.6	15.7	15.9	15.9	12.4
Online townhall meetings	16.0	16.9	13.1	15.6	15.5	14.4	16.4	17.1	13.3
Tours, workshops and In-person meetings	17.5	4.0	10.6	9.8	22.2	12.0	14.0	13.6	13.1

**MOBILE APP** After informing residents that the City is considering creating a mobile application for use on smart phones and tablets, Question 24 asked residents to indicate how likely they would be to use various potential features of the application. The features tested, as well as respondents' likely use of the features, are shown in Figure 60 on the next page.

Although a majority of residents expressed interest in each feature tested, the highest rates of anticipated use were provided for emergency notifications pushed to your phone (84% very or somewhat likely to use the feature), public safety news and events (79%), and reporting potholes, graffiti, and other neighborhood concerns to the City (79%). For the interested reader, Table 20 displays how anticipated use of the smart phone application features varied by age, presence of a child in the home, and satisfaction with the City's communication efforts.

**Question 24: Resident Survey** *The City of Lake Forest is considering creating a mobile application for use on smart phones and tablets. As I read the following features of the smart phone application, I'd like to know how likely you would be to use the feature.*

**FIGURE 60 LIKELY TO USE SMART PHONE APPLICATION**



**TABLE 20 LIKELY TO USE SMART PHONE APPLICATION BY AGE, CHILD IN HOME & SATISFACTION WITH COMMUNICATION (SHOWING % VERY LIKELY)**

	Age					Child in Home (QD2)		Satisfaction with Communication (Q19)	
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older	Yes	No	Satisfied	Dissatisfied
Emergency notifications pushed to your phone	71.6	74.4	73.2	66.1	45.5	73.7	59.1	63.5	69.3
Report potholes, graffiti or other neighborhood concerns to City	55.4	61.5	68.1	52.3	37.7	63.1	47.4	52.0	57.9
Public safety news and events	55.4	59.6	62.8	46.0	35.0	59.3	43.9	47.6	55.9
Information about road conditions and traffic news	56.0	52.6	57.6	50.7	30.9	56.6	43.5	45.9	57.6
Notifications on city news, alerts, events pushed to your phone	44.9	59.2	59.4	45.9	31.6	56.3	40.7	44.5	52.2
Information about recreation, parks, trails, and special events	50.1	71.9	55.6	37.0	30.1	57.7	38.0	43.7	52.8
Ability to register online for programs and classes	48.3	65.3	49.7	39.1	33.0	56.4	37.5	43.1	51.3
Interactive maps	33.7	44.1	46.1	38.7	24.8	45.5	31.3	35.0	42.1

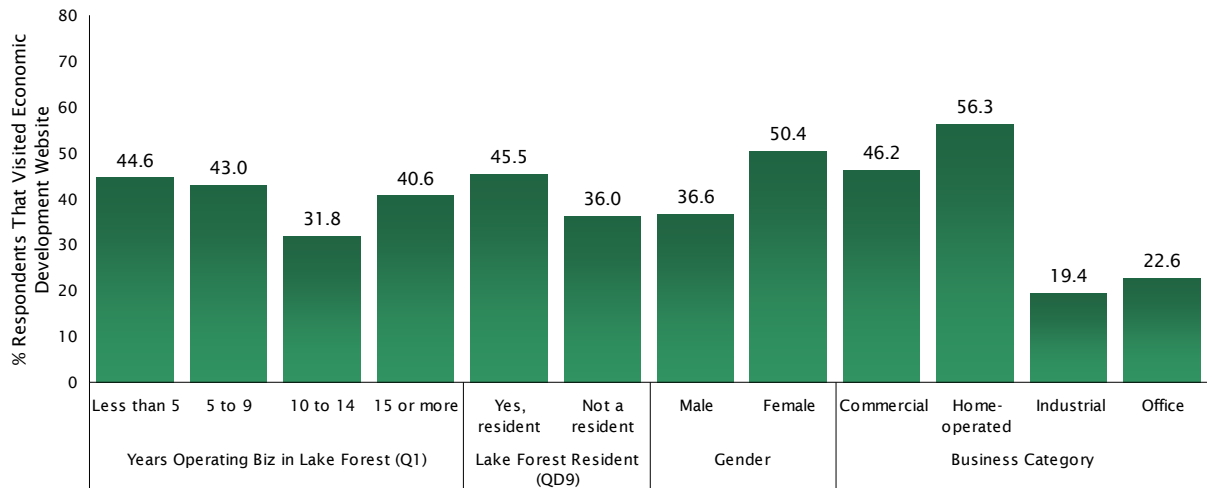
**ECONOMIC DEVELOPMENT WEBSITE** First asked in 2010, Question 15 of the business survey asked respondents whether they had ever visited the City’s economic development website at [www.lakeforestbusiness.com](http://www.lakeforestbusiness.com). As shown in Figure 61 on the next page, in the present survey 41% of local businesses indicated that they had visited the site, which is nearly identical to the value recorded in 2014, but higher than in prior survey cycles. Figure 62 presents the findings of this question by select business subgroups.

**Question 15: Business Survey** *Have you ever visited the City's economic development website at [www.lakeforestbusiness.com](http://www.lakeforestbusiness.com)?*

**FIGURE 61 VISITED ECONOMIC DEVELOPMENT WEBSITE (2016 ~ 2010)**



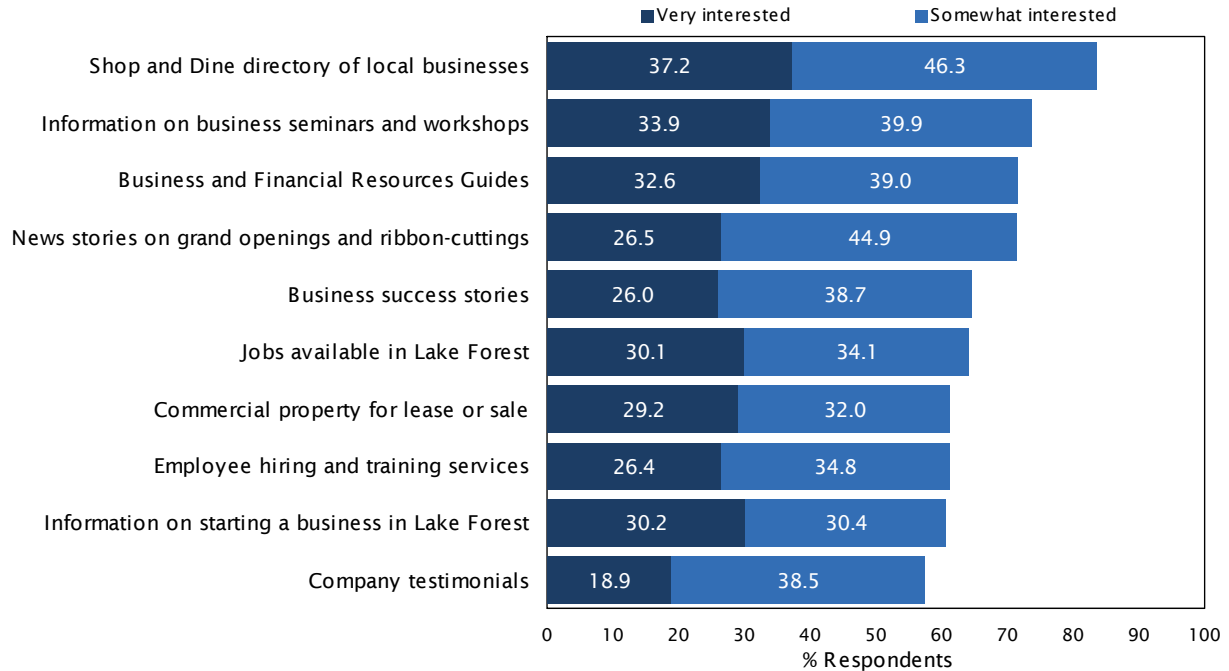
**FIGURE 62 VISITED ECONOMIC DEVELOPMENT WEBSITE BY YEARS OPERATING BIZ IN LAKE FOREST, LAKE FOREST RESIDENT, GENDER & BUSINESS CATEGORY**



Regardless of whether they had previously visited the City’s economic development website, local businesses were next asked to rate their level of interest in a variety of topics that could be addressed on the site to keep it relevant and informative. As shown in Figure 63, respondents expressed the highest levels of interest in a Shop and Dine directory of local businesses (84% very or somewhat interested), followed by information on business seminars and workshops (74%), Business and Financial resource guides (72%), and news stories on grand openings and ribbon-cutting events (71%). Table 21 compares the levels of interest between 2016 and 2014 for each topic, whereas Table 22 shows how interest in each topic varied by type of business and whether the respondent had recently visited the City’s economic development website.

**Question 16: Business Survey** *The City wants to ensure that the economic development website is relevant and informative. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.*

**FIGURE 63 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE TOPICS**



**TABLE 21 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE TOPICS (2016 ~ 2014)**

	Study Year		Change in Very + Smwt Interested
	2016	2014	
Shop and Dine directory of local businesses	83.5	82.8	+0.7
Information on business seminars and workshops	73.8	73.8	-0.0
News stories on grand openings and ribbon-cuttings	71.4	72.8	-1.5
Commercial property for lease or sale	61.2	63.5	-2.3
Information on starting a business in Lake Forest	60.6	66.6	-6.0
Company testimonials	57.5	64.2	-6.7
Business and Financial Resources Guides	71.6	78.5	-6.9
Business success stories	64.7	73.7	-9.1†
Jobs available in Lake Forest	64.2	N/A	N/A
Employee hiring and training services	61.2	N/A	N/A

**TABLE 22 INTEREST IN ECONOMIC DEVELOPMENT WEBSITE TOPICS BY BUSINESS CATEGORY & VISITED ECONOMIC DEVELOPMENT WEBSITE (SHOWING % VERY INTERESTED)**

	Business Category				Visited Economic Development Website (Q15)	
	Commercial	Home-operated	Industrial	Office	Yes	No
Shop and Dine directory of local businesses	38.2	47.9	25.8	35.5	40.7	28.1
Information on business seminars and workshops	38.6	50.0	9.3	19.4	33.9	40.9
Business and Financial Resources Guides	32.4	50.0	12.6	27.4	34.2	38.4
Information on starting a business in Lake Forest	36.5	35.4	19.7	24.2	28.7	36.5
Jobs available in Lake Forest	35.7	31.3	13.2	25.8	30.7	29.7
Commercial property for lease or sale	31.4	25.0	28.5	29.0	31.2	23.8
News stories on grand openings and ribbon-cuttings	35.3	29.2	12.1	21.0	28.9	25.6
Employee hiring and training services	33.5	20.8	16.4	29.0	25.0	33.1
Business success stories	26.0	39.6	16.5	17.7	28.8	29.7
Company testimonials	21.6	27.1	3.3	16.1	19.9	17.8

Question 17 followed up by asking respondents if there were any topics not previously mentioned that the City could address in its newsletter. Most respondents desired no additional information in the newsletter. Of those who did, topics varied greatly, limiting the ability or need to categorize responses as presented elsewhere in this report. For the interested reader, the verbatim responses to the question are presented below.

**Question 17: Business Survey** *Is there a particular business topic that I didn't mention that you'd like to be addressed in the City's newsletter? If yes, ask: Please briefly describe it to me.*

- As a military veteran with a business, we would like to have benefits services.
- How much is the city paying for the O.C. Sheriff's security services? I see countless sheriff vehicles roaring up and down El Toro and Lake Forest all day and night - Are we over-policing a city with almost no crime? And paying a ton of taxpayer money to do so?
- I have seen many restaurants that come in and go out. They go out of business shortly. They need to be educated. They need to know that it is a tough industry.
- I would say employment services or the ability to see qualifications for job candidates.
- It is about health and safety.
- It would be business mixers. It is a once a month thing where business owners get together and just networked, and it is hosted by the city. It is where business owners in City of Lake Forest are invited.
- It would be concentrating on small businesses.
- It would be environmental preservation.
- It would be the state regulations and awareness on local grants that they are offering to businesses.
- Lake Forest does start to implement restrictive regulations that people are notified, that we are not caught off guard.
- Local nonprofits as a key sector of the business climate that bring outside funds into Lake Forest.
- Networking?
- New businesses, buildings, or tenants coming to Lake Forest.
- Parking at some of the new sites as mentioned previously.
- There could be ways and means in which business owners can acquire and purchase commercial real estate in order to become property owners instead of tenants.
- They actually advertise the anthology. They wanted to feature one city every time, and they need to do that to help businesses exist. They give the advertisements half a coupon and that should not be the reason if I'm not a member of the Chamber of Commerce. They need to help the small businesses.
- They could have updated construction rules and regulations.

**BUSINESS WORKSHOPS** Continuing with the theme of identifying topics and services of interest to local businesses, participants in the business survey were also asked about their interest in attending a variety of seminars the City is considering for local businesses. The seminar topics and respondents' stated interest in each are shown in Figure 64.



Lake Forest businesses expressed the greatest interest in attending business networking events (71% very or somewhat interested), social media and marketing seminars (70%), business marketing and sales seminars (69%), and workshops that address legal issues for businesses (68%).

When compared with 2014, overall interest in workshops that address business legal issues increased significantly (Table 23). Table 24 shows how the percentage of respondents who expressed being *very interested* in each seminar topic varied by category of business.

**Question 18: Business Survey** *The City of Lake Forest also hosts a variety of workshops for local businesses. As I read each of the following types of seminars, please indicate whether you would be very interested, somewhat interested, or not interested in attending the seminar.*

**FIGURE 64 INTEREST IN BUSINESS WORKSHOP TOPICS**



**TABLE 23 INTEREST IN BUSINESS WORKSHOP TOPICS (2016 ~ 2014)**

	Study Year		Change in Very + Smwt Interested
	2016	2014	
Business legal issues	67.7	57.0	+10.7†
Social Media and Marketing	70.0	65.0	+5.0
Business job fair and expo	63.2	58.8	+4.3
Importing and Exporting	30.3	27.2	+3.1
Understanding business finance	56.5	53.8	+2.7
Roundtable discussion on specific topics	56.2	55.6	+0.6
Payroll and tax reporting requirements	48.4	48.8	-0.4
Business networking events	71.3	72.6	-1.3
Business marketing and sales	69.3	71.8	-2.6
Starting a business and developing a business plan	44.3	49.5	-5.2

† Statistically significant difference (p < 0.05) between the 2014 and 2016 studies.

**TABLE 24 INTEREST IN BUSINESS WORKSHOP TOPICS (SHOWING % VERY INTERESTED) BY BUSINESS CATEGORY**

	Business Category			
	Commercial	Home-operated	Industrial	Office
Business marketing and sales	38.8	29.2	6.7	25.8
Business networking events	29.3	41.7	13.2	25.8
Social Media and Marketing	39.8	27.1	10.4	19.4
Business legal issues	30.5	35.4	8.7	17.7
Understanding business finance	23.1	27.1	3.3	17.7
Business job fair and expo	27.9	22.9	3.3	22.6
Payroll and tax reporting requirements	20.1	25.0	19.1	17.7
Starting a business and developing a business plan	23.6	22.9	6.6	12.9
Importing and Exporting	15.5	14.6	6.6	6.5
Roundtable discussion on specific topics	8.0	16.7	3.3	12.9

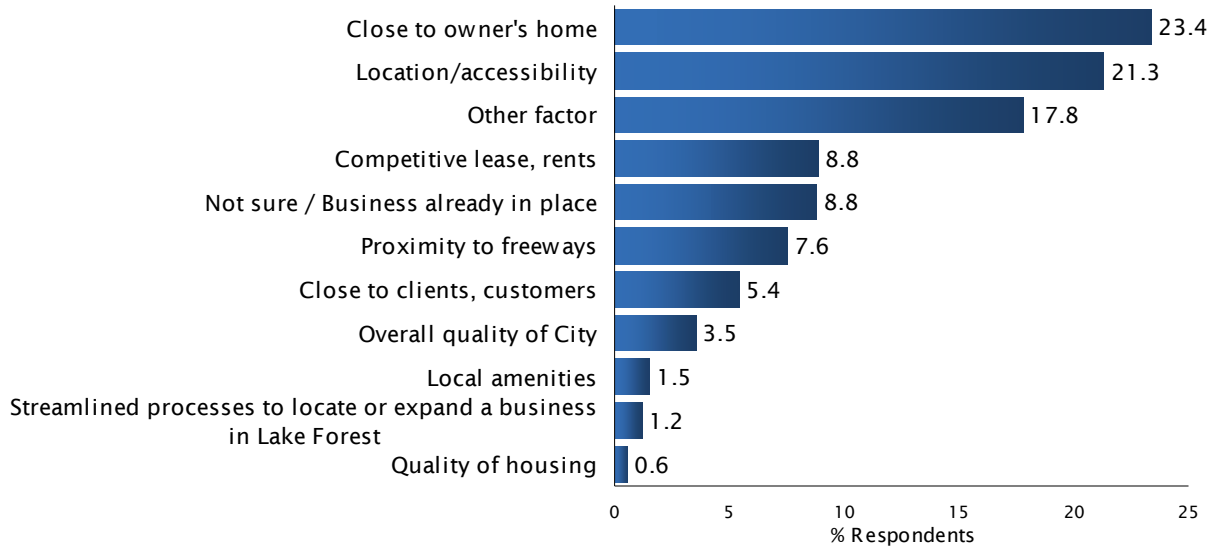
## BUSINESS BACKGROUND INFO

At the conclusion of the business survey, respondents were asked several questions about their businesses—including their reasons for locating in Lake Forest, as well as expectations regarding future growth, space requirements, and possible relocation.

**REASONS FOR LOCATING IN LAKE FOREST** When asked to identify the most important factor for why they chose to locate their business in the City of Lake Forest, approximately one-quarter (23%) indicated that it is close to the owner’s home, and an additional 21% mentioned location/accessibility of Lake Forest. Other specific reasons included competitive lease rates/rents (9%), proximity to freeways (8%), and that Lake Forest is close to their clients/customers (5%).

**Question D3: Business Survey** What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest? Do not read list - record first response

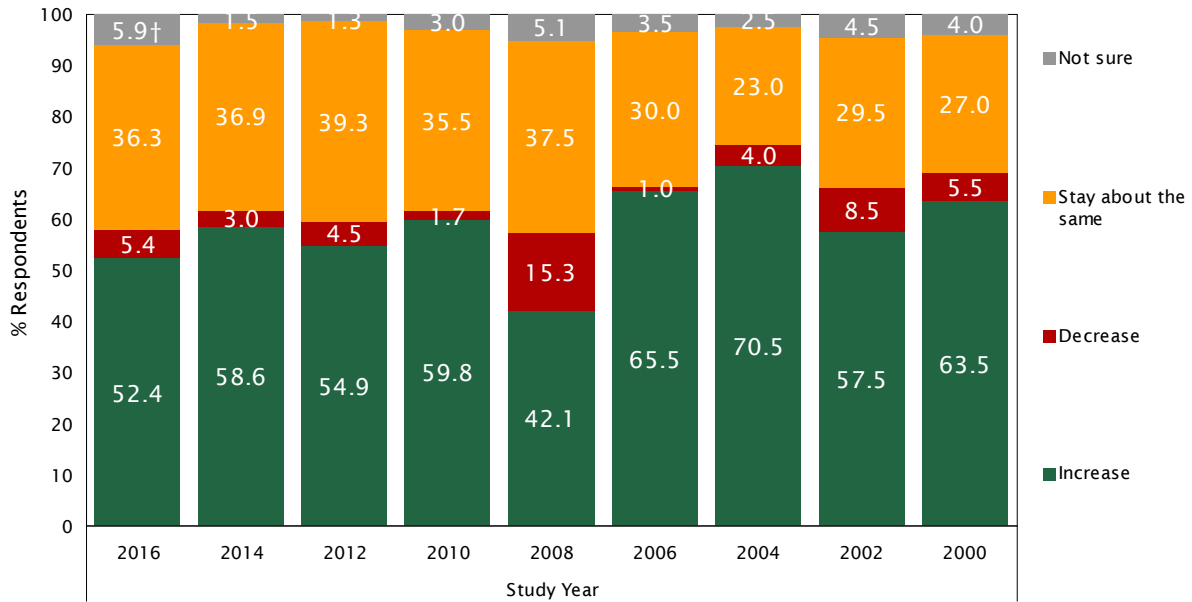
**FIGURE 65 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST**



**GROWTH** The next question in this series asked local businesses whether—in the next 12 months—they anticipated that their business will increase, decrease, or stay about the same. The results to this question for 2016 and the prior eight studies are shown in Figure 66 on the next page. As in prior years, local businesses were generally optimistic about their future growth, with 52% anticipating growth and 36% expecting that their business would remain about the same. Just 3% indicated that they expect their business to decrease in the coming year, whereas 6% were unsure.

**Question D4: Business Survey** *In the next 12 months, do you think your business will increase, decrease or stay about the same?*

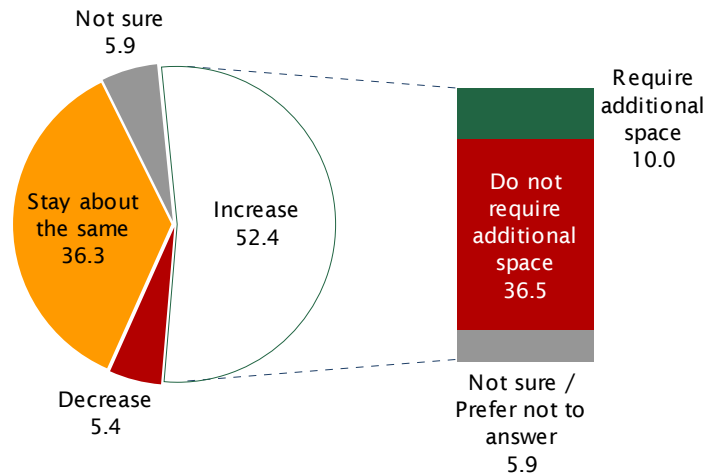
**FIGURE 66 BUSINESS SIZE IN NEXT 12 MONTHS (2016 ~ 2000)**



Among the 52% of businesses that anticipated growth, 10% indicated that they would require additional space whereas the remaining 42% were either unsure or did not anticipate needing additional space (Figure 67).

**Question D5: Business Survey** *To accommodate the growth in your business, will you require additional square footage or a larger building?*

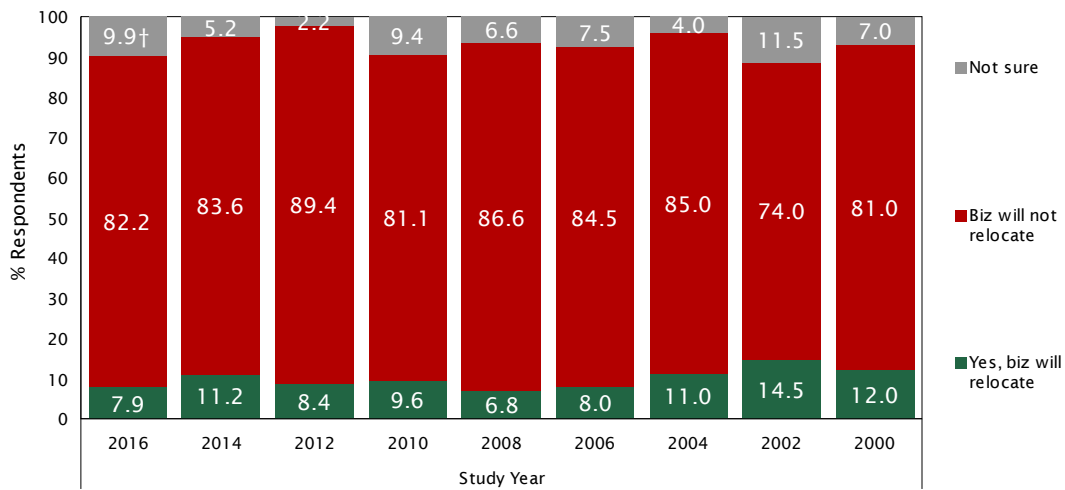
**FIGURE 67 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS**



**RELOCATION** The final two substantive questions in the business survey asked respondents whether they anticipated relocating their business in the next year and, if yes, if they were planning to relocate within Lake Forest or to another community. Figure 68 shows that the percentage of businesses that anticipated relocating in the 2016 survey was just 8%, the lowest figure since 2008. Of the 8% of businesses that anticipated relocating in the next year, approximately 2% expected to relocate to another community, 4% within Lake Forest, and the remainder were unsure (see Figure 69).

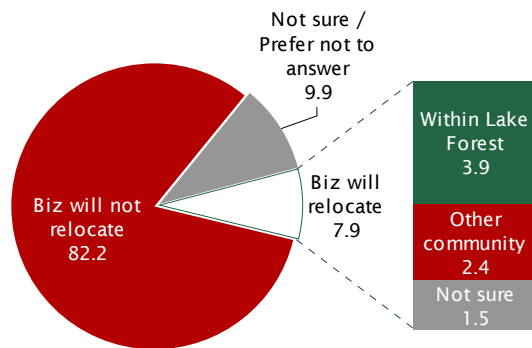
**Question D6: Business Survey** *In the next 12 months, do you think your business will relocate?*

**FIGURE 68 BUSINESS RELOCATION IN NEXT 12 MONTHS (2016 ~ 2000)**



**Question D7: Business Survey** *Will you be relocating your business within Lake Forest or to another community?*

**FIGURE 69 BUSINESS RELOCATION IN NEXT 12 MONTHS**



## BACKGROUND & DEMOGRAPHIC INFO

Table 25 presents the key demographic and background information that was collected during the survey of residents. Some information was gathered during the interview, whereas other information was available from the voter file. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of registered voters in the City of Lake Forest. The primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics.

**TABLE 25 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY (2016 ~ 2002)**

Study Year	2016	2014	2012	2010	2008	2006	2004	2002
<b>Total Respondents</b>	<b>704</b>	<b>400</b>	<b>400</b>	<b>400</b>	<b>400</b>	<b>400</b>	<b>400</b>	<b>400</b>
<b>QD1 Employment status</b>								
Employed full-time	50.8	49.7	56.5	51.2	54.6	58.5	N/A	N/A
Employed part-time	11.1	9.4	10.6	9.1	13.7	11.0	N/A	N/A
Student	5.1	4.0	5.5	3.6	2.6	3.7	N/A	N/A
Homemaker	4.6	9.0	3.2	5.0	8.4	7.9	N/A	N/A
Retired	23.4	20.0	18.1	19.2	13.6	16.0	N/A	N/A
In-between jobs	2.5	4.3	4.7	9.0	6.0	1.9	N/A	N/A
Prefer not to answer	2.5	3.6	1.5	2.9	0.9	1.1	N/A	N/A
<b>QD2 Child in home</b>								
Yes	37.7	36.0	38.7	43.9	41.3	43.4	44.5	44.8
No	61.0	60.3	59.8	54.0	58.5	56.4	55.0	54.3
Prefer not to answer	1.3	3.7	1.5	2.1	0.2	0.2	0.5	1.0
<b>QD3 Live in HOA</b>								
Yes	70.4	68.8	73.8	75.6	74.8	73.3	72.8	73.3
No	28.0	26.9	24.5	22.2	24.4	25.6	26.0	25.3
Prefer not to answer	1.6	4.3	1.7	2.2	0.8	1.1	1.3	1.5
<b>QD4 Household income</b>								
Under \$40K	8.8	9.6	10.7	10.6	8.1	7.0	9.5	11.5
\$40K to \$59K	10.7	12.0	13.7	11.8	10.1	10.3	14.8	15.3
\$60K to \$79K	11.4	10.2	10.1	13.4	13.9	16.8	21.0	12.8
\$80K to \$99K	11.8	11.9	12.7	15.8	15.9	10.7	13.3	17.0
\$100K or more	43.3	35.6	39.9	36.0	36.6	42.4	31.3	29.3
Not sure / Prefer not to answer	14.0	20.8	12.9	12.5	15.4	12.9	10.3	14.3
<b>QD5 Gender</b>								
Male	46.8	46.1	47.7	47.7	47.7	47.5	49.8	49.3
Female	52.0	53.9	52.3	52.3	52.3	52.5	50.3	50.8
Prefer not to answer	1.2	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>S1 Party</b>								
Democrat	32.4	30.3	28.0	26.7	26.9	25.5	28.3	26.5
Republican	41.9	38.8	44.8	49.6	50.2	52.5	50.3	54.8
Other	4.8	3.9	3.5	4.9	4.4	5.1	4.3	4.8
DTS	21.0	27.0	23.6	18.8	18.5	17.0	17.3	14.0
<b>S2 Age</b>								
18 to 29	16.3	14.8	15.3	11.1	13.4	13.4	14.5	14.8
30 to 39	13.7	13.9	15.2	15.3	17.2	16.9	20.8	22.8
40 to 49	15.5	19.6	21.1	23.9	25.9	26.9	28.8	26.5
50 to 64	31.3	32.5	31.5	32.2	28.6	29.9	23.8	23.5
65 and older	23.2	19.1	16.9	17.5	14.9	13.0	12.3	12.3
<b>S6 Home Ownership status</b>								
Own	68.4	70.3	69.5	79.9	72.0	75.3	66.5	N/A
Rent	31.6	29.7	30.5	20.1	28.0	24.7	33.5	N/A

Table 26 on the next page provides information that was collected from local businesses during the 2016 survey, along with the results to similar questions asked in prior surveys (where applicable). The information presented in the table was gathered during the survey or from the City's database of local businesses.

**TABLE 26 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY (2016 ~ 2000)**

Study Year	2016	2014	2012	2010	2008	2006	2004	2002	2000
<i>Total Respondents</i>	<i>200</i>	<i>200</i>	<i>200</i>	<i>200</i>	<i>200</i>	<i>200</i>	<i>200</i>	<i>200</i>	<i>200</i>
<b>QD1 Number of employees</b>									
1	23.6	21.3	14.2	20.8	N/A	N/A	N/A	N/A	N/A
2 to 5	32.4	38.3	34.9	37.1	N/A	N/A	N/A	N/A	N/A
6 to 10	19.4	17.2	17.0	12.7	N/A	N/A	N/A	N/A	N/A
More than 10	20.2	19.9	31.7	26.7	N/A	N/A	N/A	N/A	N/A
Prefer not to answer	4.4	3.3	2.2	2.7	N/A	N/A	N/A	N/A	N/A
<b>QD2 Number of employees live outside Lake Forest</b>									
None	24.3	28.6	15.1	27.2	N/A	N/A	N/A	N/A	N/A
1	12.5	16.7	15.5	11.0	N/A	N/A	N/A	N/A	N/A
2 to 5	26.8	24.2	29.3	28.3	N/A	N/A	N/A	N/A	N/A
6 to 10	13.5	13.9	14.6	10.9	N/A	N/A	N/A	N/A	N/A
More than 10	14.4	14.0	20.7	19.5	N/A	N/A	N/A	N/A	N/A
Prefer not to answer	8.5	2.7	4.8	3.1	N/A	N/A	N/A	N/A	N/A
<b>QD9 Resident of Lake Forest</b>									
Yes	53.3	44.7	34.2	47.2	34.5	30.5	23.5	42.5	N/A
No	46.7	54.1	65.8	52.8	63.5	68.5	76.5	55.0	N/A
Prefer not to answer	0.0	1.2	0.0	0.0	2.0	1.0	0.0	2.5	N/A
<b>Q51 Gender</b>									
Male	65.4	58.8	58.1	64.1	58.0	58.0	57.0	68.0	71.0
Female	34.0	41.2	41.9	35.9	42.0	42.0	43.0	32.0	29.0
Prefer not to answer	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Q52 Business category</b>									
C-FR	5.3	5.8	7.5	6.2	8.5	6.0	4.5	4.5	N/A
C-Southwest	12.9	9.5	10.0	12.6	8.5	8.5	8.0	8.0	N/A
C-Midcity	8.8	10.4	12.5	11.7	8.0	8.0	8.5	10.0	N/A
C-RDA	9.2	7.5	12.5	7.7	10.5	11.0	11.5	12.5	N/A
Home-operated	28.4	29.0	15.0	27.3	15.0	12.5	12.5	13.0	N/A
I-AspanLambert	2.5	2.5	5.0	4.6	9.0	8.0	10.5	12.0	N/A
I-Midcity	6.7	2.3	10.0	2.6	12.5	13.0	18.0	20.5	N/A
I-FRPH	2.0	7.7	5.0	10.3	3.5	4.0	4.5	4.0	N/A
I-RDA	0.9	1.3	2.5	1.4	2.5	2.0	2.5	2.5	N/A
Office	18.6	20.8	15.0	12.6	11.5	17.5	17.5	11.0	N/A
Other	4.6	3.2	5.0	3.0	10.5	9.5	2.0	2.0	N/A



## M E T H O D O L O G Y

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

**QUESTIONNAIRE DEVELOPMENT** Dr. McLarney of True North Research worked closely with the City of Lake Forest to develop resident and business survey questionnaires that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias in responses, the items were asked in a random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents who had visited one of the City of Lake Forest's websites in the past year were asked about their satisfaction with the resources available on the sites. The questionnaires included with this report (see *Questionnaires & Toplines* on page 76) identify the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

**CATI & PRE-TEST** Prior to fielding the surveys, the questionnaires were CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the interviews, as well as web programmed to allow online participation. The CATI and web programs navigate skip patterns, randomize the appropriate question items, and alert the interviewer or respondent to certain types of keypunching mistakes should they occur. The integrity of the questionnaires was pre-tested internally by True North and also by dialing into random homes and businesses in the Lake Forest area prior to formally beginning the surveys.

**SAMPLE** The resident survey was conducted using a sample of individuals drawn from the universe of registered voters in the City. Consistent with the profile of this universe, the sample was stratified by age, gender, partisanship, and geographic location within the City, and clusters were created to represent specific profiles on these attributes. Individuals were then randomly selected based on their profile into an appropriate cluster. This method ensures that if a person of a particular profile refused to participate in the study, they were replaced by an individual with a similar profile.

For the business survey, 200 business owners or managers completed the interview, representing a total of approximately 3,500 companies that appear in the City's business database with viable contact information. Because of the large percentage of home-based businesses in the City, the sample was not drawn in a strictly proportional manner. A total of 48 interviews were collected among home-based businesses, with the remaining 152 interviews drawn proportionately from non home-based businesses stratified according to their type and location within the City. The groups are listed as follows:

- C-FR: Commercial businesses located in shopping centers in Foothill Ranch, north of the 241 toll road.
- C-Southwest: Commercial businesses located in the shopping centers between Interstate 5 and the railroad tracks, excluding the former RDA project area (see below).



- C-Midcity: Commercial businesses located in the shopping centers between the railroad tracks and the 241 toll road, excluding the former RDA project area (see below).
- C-RDA: Commercial businesses located in shopping centers in the former redevelopment project area (RDA).
- Homeoccs: Home-based businesses.
- I-AspandLambert: Industrial businesses located in business parks and industrial areas near Aspan and Lambert.
- I-Midcity: Industrial businesses located in industrial areas between Trabucco and the 241 toll road, excluding the former RDA project area.
- I-FRPH: Industrial businesses located in business parks and industrial areas north of the 241 toll road.
- I-RDA: Industrial businesses located in industrial areas within the former redevelopment project area (RDA).
- Office: Office buildings.
- Other: Businesses that do not fit into one of the aforementioned categories.

**RECRUITING AND DATA COLLECTION** The survey followed a mixed-method design that employed multiple recruiting methods (telephone and email) and multiple data collection methods (telephone and online). Telephone interviews averaged 22 minutes in length for the resident survey and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM). It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would likely bias the sample.

Residents recruited via email were assigned a unique passcode to ensure that only individuals who received an invitation could access the online survey site, and that each individual could complete the survey only one time. During the data collection period, an email reminder notice was also sent to encourage participation among those who had yet to take the survey. Administered between November 29 and December 14, 2016, a total of 704 residents completed the survey.

In a manner similar to that described above, the business survey also employed multiple recruiting (telephone and email) and data collection methods (telephone and online). The 18-minute survey of businesses was administered to a stratified random sample of 200 local business owners and managers between December 5, 2016 and January 12, 2017. Data collection was suspended for the Christmas and New Year's holidays.

**MARGIN OF ERROR** By using stratified samples and monitoring the sample characteristics as data collection proceeded, True North ensured the samples were representative of registered voters and business managers in the City of Lake Forest. The results of the surveys can thus be used to estimate the opinions of *all* registered voters and businesses in the City. Because not every voter and business in the City participated, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found, for example, in the survey of 704 voters for a particular question and what would have been found if all 44,258 voters in Lake Forest had been surveyed.

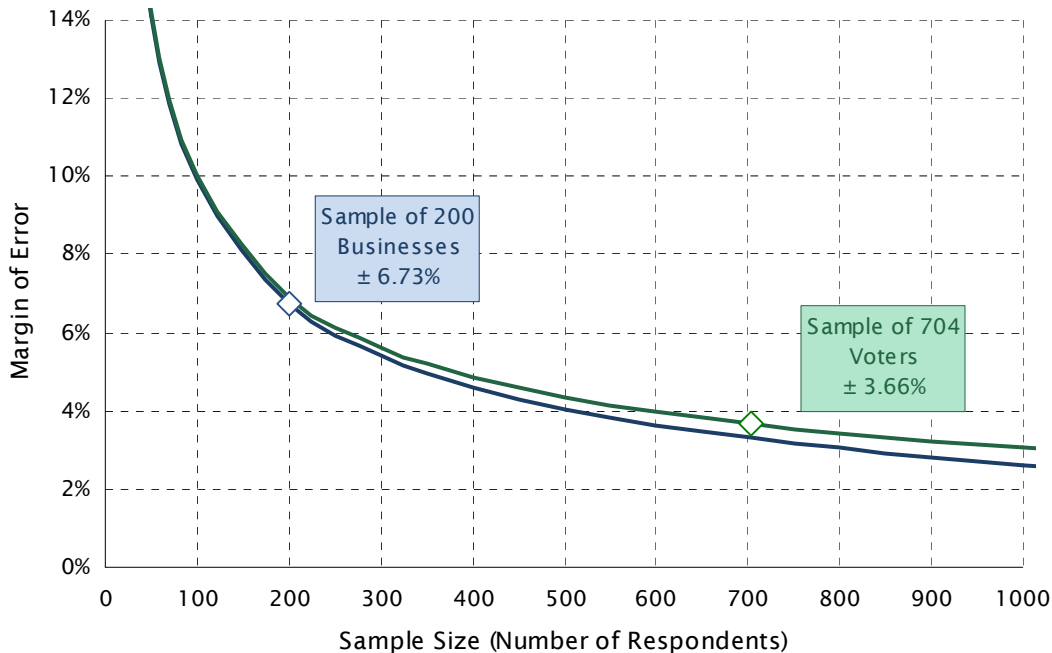
For example, in estimating the percentage of registered voters who have visited one or more of the City of Lake Forest’s websites in the past year (Question 21 of the resident survey), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

$$\hat{p} \pm t \sqrt{\left(\frac{N-n}{N}\right) \frac{\hat{p}(1-\hat{p})}{n-1}}$$

where  $\hat{p}$  is the proportion of voters who have visited a City of Lake Forest website in the past year (0.57 for 57% in this example),  $N$  is the population size of all registered voters (44,258),  $n$  is the sample size that received the question (704), and  $t$  is the upper  $\alpha/2$  point for the t-distribution with  $n-1$  degrees of freedom (1.96 for a 95% confidence interval). Solving the equation using these values reveals a margin of error of  $\pm 3.63\%$ . This means that with 57% of resident survey respondents indicating they visited a City of Lake Forest website in the past year, we can be 95% confident that the actual percentage of all registered voters who visited a City website during that period is between 53% and 61%.

Figure 70 presents the margin of error equation as a graph, plotting sample sizes along the bottom axis. There are two lines represented in the graph, which partially overlap—one for the resident survey and one for the business survey. As shown in the figure, the maximum margin of error in the resident survey for questions answered by all 704 registered voters is  $\pm 3.66\%$ , and the maximum margin of error for questions answered by all 200 business managers is  $\pm 6.73\%$ .

FIGURE 70 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by sub-groups such as years living in Lake Forest, age of the respondent, and location of household. Figure 70 above is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or within a particular

subgroup) shrinks. Because the margin of error grows exponentially as sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

**DATA PROCESSING** Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, and preparing frequency analyses and crosstabulations. Where appropriate, tests of statistical significance were conducted to evaluate whether a change in responses between 2014 and 2016 was large enough to be considered statistically significant. That said, it is also important to keep in mind that changes to the survey methodology for the 2016 resident survey can account for changes in the survey results when compared to the 2014 study, independent of actual changes in public opinion (see *Methodological Changes & Comparisons to Prior Studies* on page 2).

**ROUNDING** Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

## QUESTIONNAIRES &amp; TOPLINES

## RESIDENT SURVEY



City of Lake Forest  
Voter Survey  
Final Toplines  
January 2017

### Section 1: Introduction to Study

Hello, may I please speak to \_\_\_\_\_. Hi, my name is \_\_\_\_\_ and I'm calling on behalf of TNR, an independent public opinion research company. We're conducting a survey about issues in Lake Forest and we would like to get your opinions.

*If needed:* This is a survey about important issues in Lake Forest - I'm NOT trying to sell anything and I won't ask for a donation.

*If needed:* The survey should take around 15 minutes to complete.

*If needed:* If now is not a convenient time, can you let me know a better time so I can call back?

*If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.*

### Section 2: General Perception of City & Local Issues

I'd like to begin by asking you a few questions about what it is like to live in the City of Lake Forest.

Q1 First, how long have you lived in the Lake Forest area?

1	Less than 5 years	26%
2	5 years to less than 10 years	15%
3	10 years to less than 15 years	10%
4	15 or more years	48%
99	Not sure/Prefer not to answer	0%

Q2 How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor or very poor?

1	Excellent	39%
2	Good	52%
3	Fair	7%
4	Poor	1%
5	Very poor	1%
98	Not sure	0%
99	Prefer not to answer	0%

Q3 If the city government could do one thing to make Lake Forest a better place to live now and in the future, what would you like to see? Verbatim responses recorded and later grouped into categories shown below.

	Not sure / Cannot think of anything	14%
	Reduce traffic congestion	12%
	No changes needed	12%

Limit growth, development	11%
Clean up, improve appearance, rebuild deteriorating areas	8%
Improve public safety	5%
Improve parks, recreation (dog parks, trails, playground, sport courts)	5%
Address parking issues	4%
Improve traffic light synchronization, timing	4%
Improve, repair infrastructure	3%
Improve education, schools	3%
Improve government, staff	3%
Attract new restaurants, stores	2%
Provide more affordable housing	2%
Improve environmental efforts	2%
Provide more community-focused events	2%
Provide more entertainment, nightlife options	2%
Attract, encourage new development	2%
Address homeless, poverty issue	2%
Address animal shelter issue	2%
Reduce taxes, fees	1%
Provide more public transit	1%
Provide more senior services, programs	1%
Support, assist local businesses	1%
Improve outreach, communication, more transparency	1%
Improve, add more bike lanes	1%
Provide underground electrical lines	1%
Provide City Wi-Fi, better internet	1%
Provide marijuana dispensaries	1%
Address water issues	1%
Add more street, park lighting	1%
Better zoning enforcement	1%

Q4	Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?		
	1	Very satisfied	41%
	2	Somewhat satisfied	40%
	3	Somewhat dissatisfied	6%
	4	Very dissatisfied	4%
	98	Not sure	8%
	99	Prefer not to answer	0%

**Section 3: Police Department**

Q5 Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Police Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.  
Here's the (first/next) one: \_\_\_\_\_. Do you think this service is extremely important, very important, somewhat important, or not too important?

<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Providing neighborhood watch programs	25%	37%	30%	7%	1%	0%
B	Investigating criminal activity	55%	38%	6%	1%	1%	0%
C	Providing child safety programs	29%	39%	22%	7%	2%	1%
D	Enforcing traffic laws	28%	41%	25%	5%	1%	1%
E	Maintaining a low crime rate	65%	30%	3%	1%	0%	0%
F	Preparing for emergencies	43%	41%	12%	2%	1%	0%
G	Providing crossing guards near schools	29%	39%	20%	9%	1%	0%
H	Providing animal control services	16%	34%	35%	14%	2%	0%

Q6 For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service.  
Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion? *Get answer. If 'satisfied' or 'dissatisfied', then ask:* Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?

<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide neighborhood watch programs	23%	31%	9%	4%	31%	1%
B	Investigate criminal activity	32%	27%	8%	3%	29%	1%

C	Provide child safety programs	23%	27%	5%	1%	42%	2%
D	Enforce traffic laws	34%	37%	10%	5%	14%	1%
E	Maintain a low crime rate	47%	34%	8%	3%	9%	1%
F	Prepare for emergencies	25%	29%	7%	2%	36%	1%
G	Provide crossing guards near schools	46%	25%	5%	2%	21%	1%
H	Provide animal control services	24%	29%	7%	7%	31%	1%

**Section 4: Development Services**

**Q7** Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Development Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.  
  
Here's the (first/next) one: \_\_\_\_\_. Do you think this service is extremely important, very important, somewhat important, or not too important?

<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Issuing building permits	18%	40%	23%	10%	8%	1%
B	Inspecting buildings	23%	42%	21%	8%	6%	1%
C	Enforcing zoning regulations	24%	36%	24%	9%	7%	1%
D	Enforcing sign regulations	17%	31%	32%	14%	6%	0%

**Q8** Are you satisfied or dissatisfied with the City's efforts to: \_\_\_\_\_, or do you not have an opinion? *Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?*

<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Issue building permits	17%	22%	4%	5%	51%	2%
B	Inspect buildings	19%	20%	4%	3%	53%	2%
C	Enforce zoning regulations	17%	21%	7%	7%	46%	2%
D	Enforce sign regulations	20%	24%	6%	3%	45%	2%

**Q9** In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?

1	Yes	12%
2	No	87%
98	Not sure	0%
99	Prefer not to answer	1%

<b>Section 5: Public Works Department</b>							
<b>Q10</b>		Next, I'd like to ask about several services provided by the Public Works Department. For each of the following, please tell me whether the service is extremely important to you, very important, somewhat important, or not too important.					
		Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Street sweeping	22%	40%	32%	6%	0%	0%
B	Maintaining trees	30%	44%	22%	3%	1%	0%
C	Preventing storm-water pollution	36%	47%	13%	3%	1%	0%
D	Reducing traffic congestion	51%	37%	10%	2%	0%	0%
E	Maintaining local streets and roads	51%	42%	6%	0%	0%	0%
F	Providing bike paths and pedestrian facilities	33%	39%	23%	5%	0%	0%
G	Maintaining parks and picnic areas	35%	50%	14%	1%	0%	0%
H	Maintaining public landscapes	28%	44%	24%	4%	1%	0%
I	Garbage collection services	46%	43%	9%	0%	1%	0%
J	Recycling services	35%	41%	19%	4%	1%	0%
<b>Q11</b>		Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide street sweeping services	45%	36%	6%	3%	10%	0%
B	Maintain trees	42%	42%	7%	2%	6%	0%
C	Prevent storm-water pollution	25%	33%	5%	3%	33%	2%
D	Reduce traffic congestion	20%	38%	19%	14%	9%	0%
E	Maintain local streets and roads	41%	43%	8%	3%	3%	0%
F	Provide bike paths and pedestrian facilities	39%	40%	8%	3%	9%	1%
G	Maintain parks and picnic areas	48%	36%	8%	2%	6%	0%
H	Maintain public landscapes	43%	41%	7%	3%	6%	0%
I	Provide garbage collection services	58%	30%	4%	2%	5%	1%
J	Provide recycling services	42%	36%	7%	3%	10%	1%



<b>Section 6: Community Services Department</b>							
Q12		Next I'd like to ask you about a number of services provided by the City of Lake Forest's Community Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.					
		Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
<i>Read in Order</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Providing after school recreation programs	22%	34%	20%	16%	6%	1%
B	Providing recreation programs for pre-school children	17%	29%	24%	22%	6%	1%
C	Providing recreation and sports programs for elementary school-aged children	22%	37%	22%	13%	5%	1%
D	Providing recreation and sports programs for teens	26%	41%	17%	11%	4%	1%
E	Providing adult recreation programs such as classes, concerts and trips	16%	33%	32%	16%	3%	0%
F	Providing adult sports programs	13%	26%	36%	22%	3%	0%
G	Providing recreation programs for seniors	18%	39%	27%	13%	3%	0%
H	Providing recreation programs for families	18%	18%	3%	1%	56%	3%
I	Providing special events like concerts in the park and the Fourth of July Parade	26%	36%	25%	11%	2%	0%
J	Providing recreation programs for special needs children	27%	42%	17%	8%	3%	1%
K	Providing summer-specific recreation programs such as camps	18%	37%	27%	14%	4%	1%
Q13		Now I'd like to know how satisfied you are with the job the City of Lake Forest is doing to provide each of the services.					
		Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide after school recreation programs	20%	20%	4%	1%	52%	3%
B	Provide recreation programs for pre-school children	18%	18%	3%	1%	56%	3%
C	Provide recreation and sports programs for elementary school-aged children	23%	20%	3%	1%	49%	3%
D	Provide recreation and sports programs for teens	21%	21%	5%	3%	48%	3%

E	Provide adult recreation programs such as classes, concerts and trips	24%	23%	6%	3%	41%	3%
F	Provide adult sports programs	19%	23%	6%	2%	47%	3%
G	Provide recreation programs for seniors	20%	24%	6%	3%	45%	3%
H	Provide recreation programs for families	20%	23%	5%	2%	47%	3%
I	Provide special events like concerts in the park and the Fourth of July Parade	38%	29%	5%	1%	24%	2%
J	Provide recreation programs for special needs children	18%	17%	3%	3%	56%	3%
K	Provide summer-specific recreation programs such as camps	20%	21%	5%	2%	50%	3%

### Section 7: Recreation

Q14 The City of Lake Forest has the financial resources to provide some of the recreational amenities and facilities desired by residents. Because it can't fund every project, however, the City must set priorities.

As I read each of the following items, I'd like you to indicate whether you think the City should make the item a high priority, a medium priority, or a low priority for future City spending. If you feel the City should not spend any money on this item, just say so. Please keep in mind that not all of the items can be high priorities.

Here is the (first/next) one: \_\_\_\_\_. Should this item be a high, medium or low priority for the City - or should the City not spend any money on this item?

		High Priority	Medium Priority	Low Priority	Should not spend money	Not sure	Prefer not to answer
	<i>Randomize</i>						
A	Expand and improve the network of walking, hiking and biking trails	41%	40%	13%	4%	1%	1%
B	Provide community gardens	21%	30%	34%	12%	2%	1%
C	Provide off-leash dog park facilities	24%	28%	30%	16%	3%	1%
D	Provide additional sports courts	14%	36%	32%	14%	3%	1%
E	Provide a community swimming pool	23%	27%	28%	19%	3%	1%
F	Provide a splash pad	10%	18%	32%	22%	17%	1%
G	Add and upgrade playground equipment at existing parks	28%	43%	18%	8%	3%	1%
H	Provide additional outdoor exercise equipment	14%	30%	35%	18%	2%	1%
I	Provide a rink and activities like roller skating, roller hockey and arena soccer	17%	34%	31%	15%	2%	1%
J	Provide pickleball courts	4%	14%	37%	30%	14%	1%

Section 8: Traffic								
Q15	<p>Next, I'd like to ask you about traffic congestion. When you are driving: _____, about what percentage of your trips do you encounter <u>bad</u> traffic congestion?</p> <p><i>If needed:</i> Zero percent means you never encounter bad traffic congestion, whereas 100% means you always encounter bad traffic. You can use any number between 0 and 100.</p>							
	<i>Read in Order</i>	Average Percentage of Trips	Less than 10%	10% to 24%	25% to 49%	50% to 74%	75% or higher / Not sure / Prefer not to answer	
A	On Orange County Freeways	58.7%	2%	9%	16%	31%	37%	
B	On major streets within Lake Forest	43.0%	6%	22%	22%	27%	19%	
C	In residential areas within Lake Forest	15.8%	46%	26%	13%	8%	3%	
Q16	<p>When compared to traffic congestion in other Orange County cities, would you say that the amount of traffic congestion <u>within</u> Lake Forest is less, about the same, or more?</p>							
	1	Less						39%
	2	About the Same						41%
	3	More						17%
	98	Not sure						4%
	99	Prefer not to answer						0%
Q17	<p>Generally speaking, are you satisfied or dissatisfied with the City's efforts to improve traffic circulation by improving roads and intersections, timing traffic signals, and other measures? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</p>							
	1	Very satisfied						24%
	2	Somewhat satisfied						43%
	3	Somewhat dissatisfied						16%
	4	Very dissatisfied						12%
	98	Not sure						5%
	99	Prefer not to answer						1%
Q18	<p>If the City could fund only one traffic or transportation-related project, what should it be? Please be specific. Verbatim responses recorded and later grouped into categories shown below.</p>							
	Not sure / Cannot think of anything							33%
	Synchronized traffic, lights, signals							19%
	Address traffic on major streets and roads (El Toro, Rockfield, Trabuco, Lake Forest, Saddleback Ranch, Portola, Bake Pkwy)							11%
	Increase / improve transit schedules, buses, routes							8%
	Improve traffic congestion in general							8%

Expand, widen roads	5%
No need / Shouldn't fund transportation projects	5%
Improve infrastructure	3%
Provide free shuttles for elderly, disabled, low income residents	3%
Limit growth, development	2%
Improve, add safer bike lanes	2%
Provide a metro, bullet train	2%

### Section 9: City- Resident Communication

Q19 Are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means? *Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?*

1	Very satisfied	34%
2	Somewhat satisfied	38%
3	Somewhat dissatisfied	13%
4	Very dissatisfied	7%
98	Not sure	6%
99	Prefer not to answer	1%

Q20 What information sources do you use to find out about City of Lake Forest news, information and programming? *Don't read list. Record up to first 2 responses. If they say Internet or web, probe to see if a City website and - if yes - which one.*

1	Saddleback Valley News	8%
2	Orange County Register	18%
3	Los Angeles Times	2%
4	The Leaflet - City Newsletter	38%
5	Leisure Times - City Newsletter	6%
6	City Newsletter - no mention of Leaflet or Leisure Times	10%
7	E-newsletter - electronic newsletter	4%
8	Lake Forest Patch - <i>the Patch</i>	8%
9	City Council Meetings	1%
10	Radio	1%
11	Television	2%
12	Internet, not a City site	15%
13	City Website (not specific)	8%
14	Skatepark site (Etnies)	0%
15	Lake Forest Seniors site	1%
16	Lake Forest Teens site	0%

	17	Main City webpage or Ask Lake Forest				2%
	18	Economic Development site/Lake Forest Business				0%
	19	Flyers at City Facilities				3%
	20	Friends / Other People				7%
	21	Facebook/Twitter or other Social Media				10%
	22	Other				4%
	23	Do Not Receive Information about City				7%
	98	Not sure				2%
	99	Prefer not to answer				1%
Q21	In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?					
	1	Yes			57%	Ask Q22
	2	No			38%	Skip to Q23
	98	Not sure			5%	Skip to Q23
	99	Prefer not to answer			1%	Skip to Q23
Q22	Are you satisfied or dissatisfied with the resources and content available on the City's web sites? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?					
	1	Very satisfied			32%	
	2	Somewhat satisfied			47%	
	3	Somewhat dissatisfied			12%	
	4	Very dissatisfied			4%	
	98	Not sure			4%	
	99	Prefer not to answer			1%	
Q23	Next let me ask about communication in the <u>other</u> direction. As I read the following ways that could be available for communicating <u>to</u> the City of Lake Forest, please tell me how likely you would be to use this method of communicating with the City.					
	Here is the (first/next) one: _____. Would you be very likely, somewhat likely, or not likely to use this method for communicating information <u>to</u> the City?					
		<i>Randomize</i>	Very	Somewhat	Not at all	Prefer not to answer
A	E-mail		50%	36%	13%	1%
B	Social Media such as Facebook		24%	27%	48%	2%
C	A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates		39%	29%	31%	2%
D	The 'Ask Lake Forest' feature on the City's website to report issues and concerns		28%	39%	30%	2%

E	Online townhall meetings	15%	34%	48%	2%	
F	Telephone	27%	34%	37%	2%	
G	Tours, workshops and In-person meetings	13%	30%	54%	2%	
H	Letters sent using traditional mail	16%	26%	57%	1%	
Q24	The City of Lake Forest is considering creating a mobile application for use on smart phones and tablets. As I read the following features of the smart phone application, I'd like to know how likely you would be to use the feature. Here is the (first/next) one: _____. Would you be very likely, somewhat likely, or not likely to use this feature?					
	<i>Randomize</i>	Very likely	Somewhat likely	Not likely	Not sure	Prefer not to answer
A	Report potholes, graffiti or other neighborhood concerns to the City	53%	26%	19%	1%	2%
B	Information about road conditions and traffic news	48%	27%	23%	1%	1%
C	Notifications on city news, alerts, and events pushed to your phone	46%	28%	23%	1%	2%
D	Emergency notifications pushed to your phone	64%	20%	13%	1%	2%
E	Interactive maps	37%	30%	30%	2%	2%
F	Public safety news and events	49%	30%	18%	1%	2%
G	Ability to register online for programs and classes	44%	27%	25%	1%	2%
H	Information about recreation, parks, trails, and special events	45%	29%	23%	1%	2%

#### Section 10: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?		
	1	Employed full-time	51%
	2	Employed part-time	11%
	3	Student	5%
	4	Homemaker	5%
	5	Retired	23%
	6	In-between jobs	3%
	98	Not sure	1%
	99	Prefer not to answer	2%

D2	Do you currently have any children under the age of 18 living in your home?	
	1	Yes 38%
	2	No 61%
	99	Prefer not to answer 1%
D3	Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?	
	1	Yes 70%
	2	No 28%
	99	Prefer not to answer 2%
D4	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes.	
	1	Under \$40,000 9%
	2	\$40,000 to \$59,999 11%
	3	\$60,000 to \$79,999 11%
	4	\$80,000 to \$99,999 12%
	5	\$100,000 or more 43%
	98	Not sure 1%
	99	Prefer not to answer 13%
Thank you for participating! This survey was conducted for the City of Lake Forest.		

#### Section 11: Post-Interview & Sample Items

D5	Gender	
	1	Male 47%
	2	Female 52%
	3	Prefer not to answer 1%
S1	Party	
	1	Democrat 32%
	2	Republican 42%
	3	Other 5%
	4	DTS 21%

S2 Age		
1	18 to 29	16%
2	30 to 39	14%
3	40 to 49	16%
4	50 to 64	31%
5	65 or older	23%
99	Not coded	0%
S3 Home Owner		
1	Yes	68%
2	No	32%
S4 Area of City		
1	One	24%
2	Two	21%
3	Three	32%
4	Four	23%





City of Lake Forest  
Business Survey  
Final Toplines  
January 2017

**Section 1: Introduction to Study**

Hello, may I please speak to \_\_\_\_\_. Hi, my name is \_\_\_\_\_ and I'm calling on behalf of TNR, an independent public opinion research company. We're conducting a short survey on issues of importance to businesses in Lake Forest and would like to get your opinions.

*If needed:* This is a survey about important business issues in Lake Forest – I'm NOT trying to sell anything and I won't ask for a donation.

*If needed:* The survey should take around 10 minutes to complete.

*If needed:* If now is not a convenient time, can you let me know a better time so I can call back, or you can take the survey online at <<insert URL>> and enter <<PIN>>.

*If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.*

**Section 2: Business Climate**

I'd like to begin by asking you a few questions about what it is like to conduct business in the City of Lake Forest.

Q1	First, how long has your business operated in Lake Forest?	
1	Less than 5 years	29%
2	5 years to less than 10 years	19%
3	10 years to less than 15 years	12%
4	15 or more years	39%
99	Not sure / Prefer not to answer	0%
Q2	How would you rate the business climate in Lake Forest compared to other cities in the area? Would you say it is excellent, good, fair, poor, or very poor compared to other cities in the area?	
1	Excellent	30%
2	Good	41%
3	Fair	15%
4	Poor	3%
5	Very poor	1%
98	Don't Know	10%
99	Prefer not to answer	0%

Q3	If the city government could do one thing to improve the business climate in Lake Forest, what would you like to see? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of any	38%
	No changes everything is okay	22%
	Increase biz, networking opportunities	6%
	Fewer restrictions, regulations	6%
	Reduce signage restrictions	4%
	Other (unique responses)	4%
	Reduce taxes, fees	3%
	Improve safety, security of biz areas	3%
	More business-friendly government	3%
	Improve, add parking	2%
	Repair, maintain roads	2%
	Provide additional community events	2%
	Improve traffic	2%
	Reduce rent, lease fees, to decrease vacancies	1%
	Reduce environmental restrictions	1%
	Provide more incentives for biz	1%
	Improve City appearance, maintenance	1%
Q4	Is there a particular aspect or feature of Lake Forest that is <b>beneficial</b> to your business? If yes, ask: Please describe the aspects of Lake Forest that most benefit your business. Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / No particular aspect	48%
	Good location / Convenient access for customers	16%
	No business license / Ease of startup	8%
	Sense of community / Family-oriented City	7%
	Access to roads, freeways, surrounding communities	6%
	Public safety / Low crime rate	5%
	Cleanliness, beauty of City	5%
	Easy access to online information, advertising	3%
	Growth in business, residential area	2%
	Access to other local businesses, services	1%

Q5	Are there any particular <b>challenges</b> associated with doing business in Lake Forest? <i>If yes, ask:</i> Please briefly describe the particular challenges associated with doing business in Lake Forest. Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of any	78%
	Other (unique responses)	7%
	Too many regulations	4%
	Undocumented immigrant issue	4%
	Traffic, parking issues	3%
	Advertisement restrictions	2%
	City maintenance, infrastructure	2%
	High expenses, rents, fees	1%
	Location, accessibility	1%

### Section 3: City Services

Q6	Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? ( <i>get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?							
	1	Very satisfied						54%
	2	Somewhat satisfied						33%
	3	Somewhat dissatisfied						5%
	4	Very dissatisfied						3%
	98	Not sure						5%
	99	Prefer not to answer						0%
Q7	Now, I'm going to ask you about a number of specific services provided by the City of Lake Forest. For the following list of services, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important.  Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?							
		<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
	A	Providing business watch programs	17%	34%	25%	16%	5%	3%
	B	Investigating criminal activity	37%	47%	10%	6%	1%	0%
	C	Enforcing traffic laws	24%	40%	21%	14%	1%	0%
	D	Maintaining a low crime rate	50%	44%	5%	2%	0%	0%
	E	Providing building permit services	18%	40%	21%	17%	3%	1%
	F	Providing building inspection services	17%	32%	26%	23%	2%	1%

G	Promoting economic development	28%	44%	16%	12%	1%	0%
H	Revitalizing out-dated areas in the City	27%	38%	23%	11%	0%	1%
I	Providing business education events	12%	30%	33%	23%	1%	1%
J	Providing business networking events	17%	33%	31%	19%	0%	0%
K	Providing free business consulting services	18%	23%	26%	30%	3%	1%
L	Providing hiring or employee training services	7%	27%	28%	35%	3%	1%
Q8	For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?						
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide business watch programs	20%	32%	5%	1%	39%	2%
B	Investigate criminal activity	42%	33%	5%	1%	19%	0%
C	Enforce traffic laws	49%	32%	4%	1%	12%	1%
D	Maintain a low crime rate	54%	32%	3%	4%	7%	0%
E	Provide building permit services	31%	30%	2%	2%	30%	6%
F	Provide building inspection services	29%	30%	5%	1%	30%	3%
G	Promote economic development	35%	35%	8%	1%	19%	2%
H	Revitalize out-dated areas in the City	29%	43%	7%	3%	17%	1%
I	Provide business education events	27%	29%	10%	1%	31%	3%
J	Provide business networking events	28%	30%	10%	2%	28%	1%
K	Provide free business consulting services	22%	32%	7%	2%	35%	2%
L	Provide hiring or employee training services	15%	30%	7%	2%	45%	2%
Q9	Now I'm going to ask you about another series of specific services provided by the City. Again, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?						
<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Enforcing zoning regulations	16%	35%	31%	15%	3%	0%
B	Enforcing sign regulations	13%	35%	29%	22%	2%	0%
C	Street sweeping	23%	36%	29%	11%	0%	0%

D	Reducing traffic congestion	31%	46%	12%	10%	1%	0%
E	Maintaining local streets and roads	30%	54%	11%	6%	0%	0%
F	Landscaping median strips and other areas of the City	20%	39%	25%	15%	0%	0%
Q10	Turning to your satisfaction with these same services, would you say that you are satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?						
	<i>Randomize</i>	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Enforce zoning regulations	27%	38%	1%	4%	30%	1%
B	Enforce sign regulations	30%	39%	3%	6%	23%	0%
C	Provide street sweeping services	43%	40%	3%	0%	14%	1%
D	Reduce traffic congestion	28%	48%	9%	6%	10%	0%
E	Maintain local streets and roads	44%	44%	3%	1%	8%	0%
F	Landscaping median strips and other areas of the City	44%	45%	2%	1%	7%	1%

**Section 4: City-Business Communication**

Q11	Are you satisfied or dissatisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?			
	1	Very satisfied	44%	Skip to Q13
	2	Somewhat satisfied	32%	Skip to Q13
	3	Somewhat dissatisfied	8%	Ask Q12
	4	Very dissatisfied	4%	Ask Q12
	98	Not sure	10%	Skip to Q13
	99	Prefer not to answer	2%	Skip to Q13
Q12	Is there a particular reason why you are dissatisfied with the City's efforts to communicate with local businesses? Please be specific. Verbatim responses for 23 dissatisfied customers presented below.			
	<i>I cannot remember receiving any information?</i>			
	<i>I didn't receive any.</i>			
	<i>I don't even see any forms of communication.</i>			
	<i>I don't recall being contacted.</i>			
	<i>I don't think they reach out to all businesses in Lake Forest. There could be a particular focus on the restaurant.</i>			
	<i>I feel there is a need for communication, and they only communicate with the business when the city wants something.</i>			
	<i>I have been in this location for a year, but I have not seen any printed material sent to us.</i>			

	<i>I have never received a correspondence reference in newsletters for outreach.</i>	
	<i>I have no clue on what they are actually doing or what services they provide.</i>	
	<i>I never receive any newsletter or anything from them.</i>	
	<i>I'd like to be much more in the loop with this great city.</i>	
	<i>It is because I don't even have any knowledge at all on those programs or services they offer to businesses.</i>	
	<i>It is because I don't have any idea what they are doing.</i>	
	<i>It is because they are not communicating with us, but it would be nice if they will communicate with us even in newsletters or direct mail.</i>	
	<i>LF needs to be more aggressive in connecting with businesses because as we grow, so does the city.</i>	
	<i>The city doesn't take enough effort to communicate with businesses and they can do a lot more in order to improve.</i>	
	<i>The more they have meetings and gatherings, the more we can interact with each other and make Lake Forest a better place to live.</i>	
	<i>Their fees, in the Chamber of Commerce, are too high. They need to cut that into half or less. They need to be more inviting and more flexible. There was this guy with handcuffs like I'm a criminal.</i>	
	<i>There is business favoritism.</i>	
	<i>There is lack of communication to businesses.</i>	
	<i>We don't receive any communications from the city itself.</i>	
	<i>We haven't received any communications from the City.</i>	
Q13	<b>What information sources do you use to find out about City of Lake Forest news, information and programming? Don't read list. Record up to first 2 responses.</b>	
	<i>If they say Internet or web, probe to see if a City website and - if yes - which one.</i>	
1	Saddleback Valley News (paper)	6%
2	Orange County Register (paper)	8%
3	Los Angeles Times (paper)	1%
4	The Leaflet - City Newsletter	21%
5	Leisure Times - City Newsletter	3%
6	City Newsletter - no mention of Leaflet or Leisure Times	9%
7	E-newsletter - electronic newsletter	13%
8	Lake Forest Patch - the Patch	8%
9	City Council Meetings	1%
10	Radio	0%
11	Television	0%
12	Internet, not a City site	18%
13	City Website (not specific)	19%
14	Skatepark site (Etnies)	1%
15	Lake Forest Seniors site	0%

	16	Lake Forest Teens site		0%
	17	Main City Web Page		2%
	18	Economic Development Website		2%
	19	Flyers at City Facilities		3%
	20	Friends / Other People		4%
	21	Facebook/Twitter or other social media		5%
	22	Other		5%
	23	Do Not Receive Information about City		8%
	98	Not sure		6%
	99	Prefer not to answer		1%
Q14	As I read the following ways that the City of Lake Forest can communicate with local businesses, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with your business.			
	<i>Randomize</i>		Very	Somewhat
			Not at all	Not sure / Prefer not to answer
A	E-mail		52%	32%
B	Electronic Newsletters		42%	39%
C	Twitter		7%	31%
D	Facebook		24%	38%
E	A Smart Phone application that would allow you to communicate with the City, report issues, and receive updates		43%	34%
F	City website		45%	38%
G	A Blog on the City's website		25%	40%
H	Newsletters and other materials mailed directly to your business		43%	37%
I	Automated phone calls		11%	26%
J	Town hall and community meetings		20%	55%
K	Advertisements in local papers		15%	36%
L	Public Access Television		13%	33%
Q15	Have you ever visited the City's economic development website at <a href="http://www.lakeforestbusiness.com">www.lakeforestbusiness.com</a> ?			
	1	Yes		41%
	2	No		58%
	99	Prefer not to answer		1%

Q16 The City wants to ensure that the economic development website is relevant and informative. As I read each of the following topics, please indicate whether you are very interested, somewhat interested, or not interested in this topic.					
	<i>Randomize</i>	Very Interested	Somewhat Interested	Not Interested	Not sure / Prefer not to answer
A	Information on starting a business in Lake Forest	30%	30%	35%	4%
B	Company testimonials	19%	39%	38%	5%
C	Business and Financial Resources Guides	33%	39%	26%	2%
D	Business success stories	26%	39%	33%	3%
E	News stories on grand openings and ribbon-cuttings	26%	45%	26%	3%
F	Shop and Dine directory of local businesses	37%	46%	14%	3%
G	Commercial property for lease or sale	29%	32%	36%	3%
H	Information on business seminars and workshops	34%	40%	23%	3%
I	Jobs available in Lake Forest	30%	34%	33%	3%
J	Employee hiring and training services	26%	35%	35%	4%
Q17 Is there a particular business topic that I didn't mention that you'd like to be addressed in the City's newsletter? If yes, ask: Please briefly describe it to me.					
	Verbatim responses recorded		Data for 17 respondents on file		
2	No additional topics		76%		
98	Don't Know		14%		
99	Prefer not to answer		1%		
Q18 The City of Lake Forest also hosts a variety of workshops for local businesses. As I read each of the following types of seminars, please indicate whether you would be very interested, somewhat interested, or not interested in attending the seminar.					
	<i>Randomize</i>	Very Interested	Somewhat Interested	Not Interested	Not sure / Prefer not to answer
A	Starting a business and developing a business plan	18%	26%	54%	1%
B	Understanding business finance	22%	35%	42%	1%
C	Business job fair and expo	21%	42%	35%	1%
D	Payroll and tax reporting requirements	20%	28%	50%	1%
E	Business marketing and sales	30%	39%	29%	1%
F	Business legal issues	26%	41%	31%	1%
G	Business networking events	29%	42%	28%	1%
H	Roundtable discussion on specific topics	10%	46%	41%	2%



I	Social Media and Marketing	29%	41%	28%	2%
J	Importing and Exporting	12%	19%	68%	2%

### Section 5: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	How many people are currently employed at your worksite in Lake Forest?		
	1	24%	
	2 to 5	32%	
	6 to 10	19%	
	More than 10	20%	
	Prefer not to answer	4%	
D2	Approximately how many of these employees live <b>outside</b> of Lake Forest?		
	None	24%	
	1	13%	
	2 to 5	27%	
	6 to 10	13%	
	More than 10	14%	
	Prefer not to answer	9%	
D3	What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest? <i>Do not read list - record first response</i>		
	1	Competitive lease rates/building rents	9%
	2	Quality business parks	0%
	3	Proximity to freeways/transportation corridors	8%
	4	Quality of housing stock	1%
	5	Overall quality of the City	4%
	6	Local amenities (dining/shopping)	2%
	7	Close to clients/customers	5%
	8	Close to owner's home	23%
	9	Streamlined processes to locate or expand a business in Lake Forest	1%
	10	Location/accessibility	21%
	12	Other	18%
	98	Not sure / Business already in place	9%

D4	In the next 12 months, do you think your business will increase, decrease or stay about the same?			
	1	Increase	52%	Ask D5
	2	Decrease	5%	Skip to D6
	3	Stay about the same	36%	Skip to D6
	98	Not sure	5%	Skip to D6
	99	Prefer not to answer	1%	Skip to D6
D5	To accommodate the growth in your business, will you require additional square footage or a larger building?			
	1	Yes	19%	
	2	No	70%	
	98	Not sure	11%	
	99	Prefer not to answer	0%	
D6	In the next 12 months, do you think your business will relocate?			
	1	Yes	8%	Ask D7
	2	No	82%	Skip to D9
	98	Don't Know	10%	Skip to D9
	99	Prefer not to answer	0%	Skip to D9
D7	Will you be relocating your business within Lake Forest or to another community?			
	1	Lake Forest	50%	Skip to D9
	2	Another community	31%	Ask D8
	98	Not sure	19%	Skip to D9
	99	Prefer not to answer	0%	Skip to D9
D8	Is there a particular reason why your business is leaving Lake Forest? <i>If yes, ask: Please describe the reason.</i>			
	Verbatim responses recorded		Data for 3 respondents on file	
D9	Last question for you. Are you a resident of Lake Forest?			
	1	Yes	53%	
	2	No	47%	
	99	Refused	0%	
Thank you for participating! This survey was conducted for the City of Lake Forest.				

<b>Section 7: Post-Interview &amp; Sample Items</b>		
<b>S1</b>	<b>Gender (Determined by voice of respondent)</b>	
	1 Male	65%
	2 Female	34%
	99 Prefer not to answer	1%
<b>S2</b>	<b>Business Subgroup</b>	
	1 C-FR	5%
	2 C-Southwest	13%
	3 C-Midcity	9%
	4 C-RDA	9%
	5 Homeoccs	28%
	6 I-AspanLambert	2%
	7 I-Midcity	7%
	8 I-FRPH	2%
	9 I-RDA	1%
	10 Office	19%
	11 Other	5%
<b>S3</b>	<b>Business Category</b>	
	1 Commercial	36%
	2 Home-operated	28%
	3 Industrial	12%
	4 Office	19%
	5 Other	5%