

COMMUNITY SATISFACTION SURVEY
SUMMARY REPORT

PREPARED FOR THE
CITY OF LAKE FOREST



MARCH 12, 2021



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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 policy-related matters; *and*
- 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.

STATISTICAL SIGNIFICANCE As discussed above, many of the figures and tables in this report present the results of questions asked in 2021 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 changes that likely reflect actual changes in public opinion from the last survey (2018) to the current survey (2021)—as opposed to being due to chance associated with independently selected samples. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion between the two studies. 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 2021.

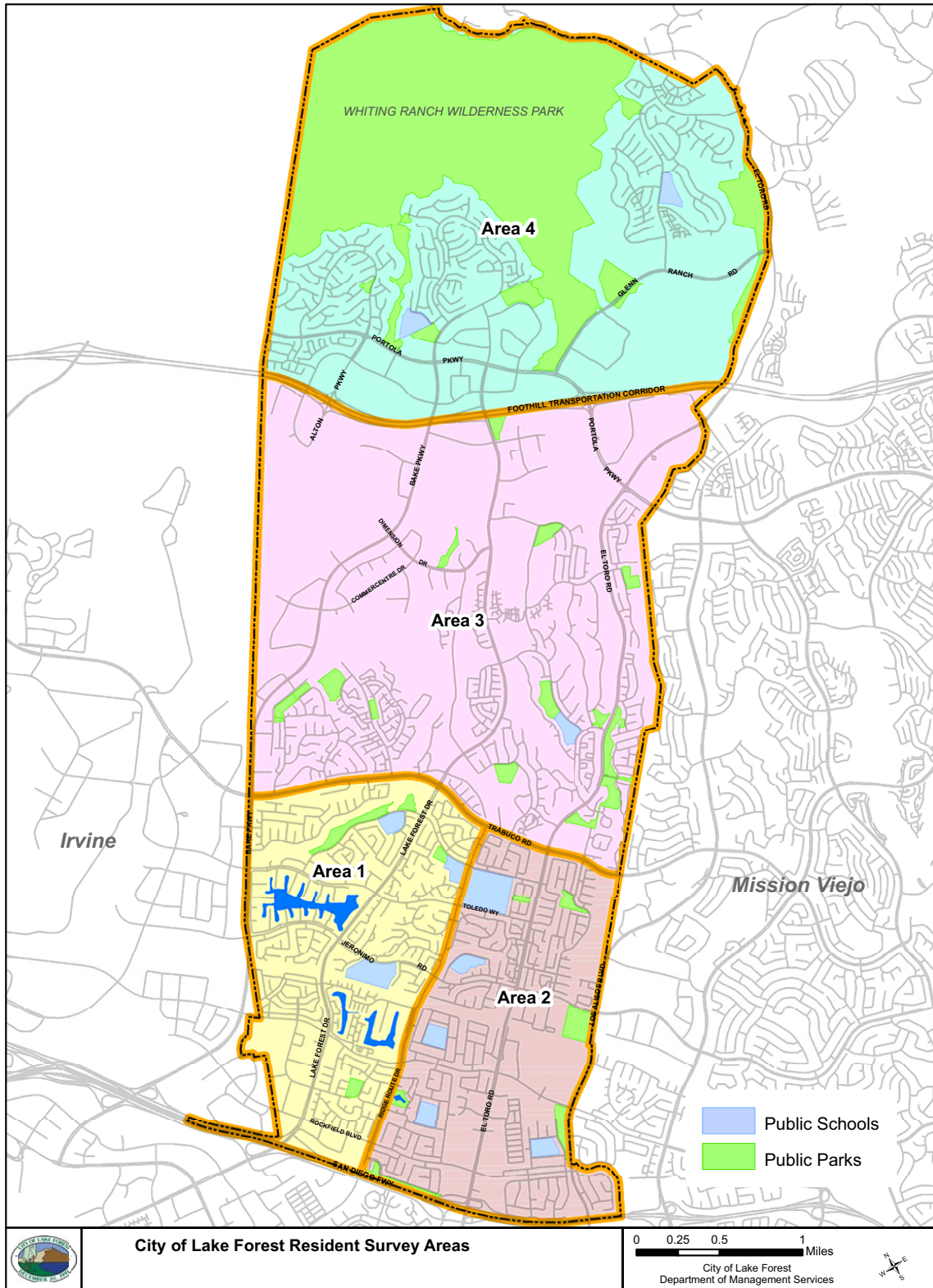
OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 75). In brief, a total of 612 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between January 15 and January 31, 2021. Survey participants were categorized into one of four geographic areas according to the location of their residence (see Figure 1 on the next page) as well as by Council District. 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 January 20 and February 16, 2021. Both studies employed a mixed-methodology approach that utilized multiple recruiting methods (email and telephone) and multiple data collection methods (telephone and online).

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 City of Lake Forest for the opportunity to conduct the study and for contributing valuable input during the design stage of this study. The collective experience, insight, and local knowledge provided by city representatives and staff 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.

FIGURE 1 MAP OF LAKE FOREST STUDY AREA



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, establishing fiscal priorities, passing revenue measures, 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 400 studies for California municipalities and special districts.



JUST THE FACTS

The following is an outline of the main factual findings from the 2021 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 (90%) of residents surveyed shared favorable opinions of the quality of life in Lake Forest, with 31% reporting it is excellent and 59% stating it is good. Nine percent (9%) of residents indicated the quality of life in the City is fair, whereas less than 1% used poor or very poor to describe quality of life in the City.
- *Lake Forest as a place to raise a family* received the most favorable rating among four aspects tested (84% excellent or good). Although still positive, residents provided somewhat softer ratings for Lake Forest as a place to shop and dine (60%), retire (53%), and work (52%). Approximately one-quarter (22%) of respondents held no opinion or did not provide a rating when asked to assess Lake Forest as a place to work.
- When businesses were asked to rate the business climate in Lake Forest compared with surrounding areas, 38% reported that it is excellent, 45% said it is good, and 14% offered that it is fair. Only 2% 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, 27% of residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (16%) or desired no changes from the City (11%). Of the specific suggestions, the most common were attracting new restaurants and stores (13%), limiting growth and development (11%), improving public safety (9%), addressing homelessness/poverty issues (7%), and reducing traffic congestion (5%).
- When asked about what the City could do to improve the business climate in Lake Forest, approximately six-in-ten business managers surveyed indicated that no changes were needed (27%) or were unsure of a change that could be made (34%). Specific suggestions for improving the business climate included promoting/advertising local businesses (5%), addressing COVID-related concerns/helping businesses (4%), addressing homelessness/housing related issues (4%), reducing taxes/fees (4%), improving traffic congestion (4%), and pursuing business-friendly policies (4%).
- More than half (52%) 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 (13%), access to other local businesses and services (7%), access to roads, freeways, and surrounding communities (5%), and no business license requirement/ease of start-up (5%) were mentioned most often.
- Eight-in-ten (79% of) business managers surveyed said they could not think of any challenges associated with doing business in Lake Forest. The most common specific challenges cited were COVID-19 related concerns (4%), traffic and parking issues (3%), public safety/homelessness concerns (2%), and illegal immigration issues (2%).
- Eight-in-ten residents (81%) and nine-in-ten local businesses (91%) 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 Department**, residents rated maintaining a low crime rate as the most important service (95% extremely or very important), followed by investigating criminal activity (95%) and preparing for emergencies (90%). Residents were most satisfied with the Department's efforts to provide crossing guards near schools (96% very or somewhat satisfied), provide child safety programs (89%), enforce traffic laws (86%), and provide animal control services (86%).
- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service provided by the Department (63%), followed by enforcing zoning regulations (59%), issuing building permits (55%), and enforcing sign regulations (51%). Satisfaction ratings assigned to the four development services ranged from a low of 79% for enforcing zoning regulations to a high of 86% for inspecting buildings.
- Of all residents surveyed, just 11% 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**, garbage collection services was viewed as the most important service (95%), followed by maintaining local streets and roads (94%), and maintaining parks and picnic areas (89%). Residents were most satisfied with the Department's efforts to provide garbage collection services (93%), maintain parks and picnic areas (91%), and maintain public landscapes (91%).
- Among the services provided by the **Community Services Department**, residents assigned the highest importance to providing recreation programs for special needs children (71%), followed by providing recreation and sports programs for teens (67%), providing special events like concerts in the park and the Fourth of July Parade (65%), and providing recreation and sports programs for elementary school-aged children (64%). Residents expressed the highest levels of satisfaction with the Department's efforts to provide recreation and sports programs for elementary school-aged children (86%), special events like concerts in the park and the Fourth of July Parade (84%), and summer-specific recreation programs such as camps (84%).

SPECIFIC SERVICES: BUSINESS SURVEY

- Among **general city services** provided by the City to local businesses, respondents in the business survey rated maintaining a low crime rate as the most important of the services tested (92% extremely or very important), followed by investigating criminal activity (78%), and promoting economic development (72%). Regarding satisfaction, at the top of the list was providing building permit services (96% very or somewhat satisfied), followed by providing business education events (93%), enforcing traffic laws (92%), and maintaining a low crime rate (92%).
- 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% extremely or very important), followed by reducing traffic congestion (68%), landscaping median strips and other areas of the City (66%) and street sweeping (64%). Satisfaction was high for all services tested, but greatest with respect to the City's efforts to landscape median strips and other areas of the City (96%), maintain local streets and roads (96%), provide street sweeping services (93%), enforce zoning regulations (93%), and enforce sign regulations (93%).

TRAFFIC

- Residents reported that, on average, they encounter bad traffic on Orange County freeways on more than half (53%) of their trips. Trips on major streets in the City were somewhat better, with an average of 42% involving bad congestion, compared with approximately 14% of trips in residential areas of the City.
- Most residents (83%) felt that Lake Forest has either less (46%) or about the same amount (38%) of traffic congestion as neighboring Orange County cities. A minority (12%) of residents surveyed felt that Lake Forest has more congestion than other Orange County cities, whereas 6% were unsure or unwilling to answer the question.
- Seven-in-ten residents indicated they were very (21%) or somewhat (49%) 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 (6%) or somewhat (17%) dissatisfied.
- When asked to identify the traffic or transportation-related improvement they would most like funded in Lake Forest, more than one-third (38%) of respondents were unsure or could not think of a traffic or transportation-related project to fund. Addressing traffic on a specific major street in the City including mentions of El Toro, Rockfield, Trabuco, and others was the most common type of suggestion (12%), followed closely by synchronizing traffic signals (11%). Other suggestions included increasing/improving transit schedules/routes (6%), reducing congestion in general (5%), and improving/repairing streets and roads (4%). An additional 8% of residents surveyed said the City should not fund any transportation projects.

NEIGHBORHOOD ISSUES, HOUSING & CCA

- The most commonly experienced neighborhood problem among those tested was too many vehicles associated with a single home (41% big or moderate problem), followed by illegally parked vehicles (32%) and too many people living in a single house (27%). Excessive noise (27%) and graffiti (19%) rounded-out the top five most prevalent problems.
- The survey asked residents and business managers about their interest in receiving electricity from the City, rather than Southern California Edison, under certain conditions. Eighty-five percent (85%) of **residents** indicated they would be more likely to purchase their electricity from the City if the rates charged would be lower (63% much more likely + 22% somewhat more likely). Approximately three-quarters also indicated they would be more likely to purchase their electricity from the City if the rates were more stable over time (75%) and a greater amount of the electricity would be produced by renewable sources like solar, wind, and biomass (73%). Fewer residents said they would be more likely to purchase electricity from the City if there would be more local control over the type of electricity produced (61%).
- Eighty-four percent (84%) of **businesses** said they would be more likely to purchase their electricity from the City if the rates charged would be lower (64% much more likely + 20% somewhat more likely). Roughly seven-in-ten businesses also said they would be more likely to purchase electricity from the City if the rates were more stable over time (75%), a greater amount of the electricity would be produced by renewable sources like solar, wind, and biomass (71%), and there would be local control over the type of electricity produced (68%).
- If the cost of electricity were the *same*, 29% of **residents** preferred to stay with Southern California Edison, 38% preferred to receive their power from the City, and one-third were unsure (31%) or unwilling to share their preference (2%). Among **businesses**, 36% preferred to stay with Southern California Edison, 36% preferred to receive their power from the City, and 29% were unsure or unwilling to share their preference.

COMMUNICATION

- Overall, 79% of residents indicated that they were either very (32%) or somewhat (47%) satisfied with the City's communication efforts.
- Among local businesses, 84% of business managers 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.
- The single most frequently cited source of city information among residents in 2021 was *The Leaflet* (43%), followed by Facebook/social media (29%), Internet in general (not a city site, 11%), one of the City's websites (general mention, 11%), and the Lake Forest *Patch* (9%).
- 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* (29%), the Internet in general (15%), electronic newsletters (14%), the City's website in general (14%), social media sites (14%), and city newsletters in general (11%).
- Overall, 48% of residents and 50% of businesses surveyed mentioned *at least one* of Lake Forest's newsletters as a source of information.
- Lake Forest business managers indicated that the most effective method the City can use to communicate with their business is electronic newsletters (87% very or somewhat effective), followed by email (86%), the City's website (84%), and direct mail to their office (75%).
- Seventy-one percent (71%) 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 82% of residents indicating they were satisfied with the resources available on the sites.
- Email received the highest percentage of residents indicating they would be likely to use the method for communicating information to the City (85% very or somewhat likely), followed by the *Ask Lake Forest* website feature (72%), *My Lake Forest* smart phone app (66%), telephone (56%), and social media such as Facebook (51%).
- Forty-four percent (44%) of local businesses indicated that they had visited the City of Lake Forest's economic development website (www.lakeforestbusiness.com).
- Business managers were also asked about their interest in attending a variety of seminars and workshops the City is considering. Businesses expressed the greatest interest in attending business networking events (68% very or somewhat interested), and seminars on business legal issues (63%) and marketing and sales (63%).

BUSINESS BACKGROUND INFO

- When asked to identify the most important factor in choosing to locate their business in Lake Forest, one-quarter (25%) said it is close to the owner's home, 21% mentioned the location/accessibility of Lake Forest, 11% cited the overall quality of the City, and 7% referenced competitive lease rates/rents, or proximity to freeways/transportation corridors.
- Local businesses were generally optimistic about the future, with 46% anticipating growth in the next year and 35% expecting that business would remain about the same. Another 8% said they expect their business to decrease in the coming year, and 11% were unsure.
- Partitioning the 46% of all businesses that anticipated growth, 8% indicated that they would require additional space, whereas the remaining 39% were either unsure or did not anticipate needing additional space.
- Ten percent (10%) of businesses surveyed anticipated relocating in the next year. Approximately 5% 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?

The period of time between the *2018 Community Satisfaction Survey* and the current study was punctuated by difficult and dramatic events in Orange County including the Blue Ridge and Silverado wildfires, the COVID-19 pandemic, and the shuttering of non-essential businesses to curb the spread of the disease. Against this turbulent backdrop, residents' opinions of their community and city government remained remarkably stable. Lake Forest residents and businesses continue to be largely 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 (91%) indicated that they were satisfied with the City's overall performance in providing municipal services *and* offered ratings of excellent or good to describe the quality of life in Lake Forest (90%) and the local business climate (83%). These sentiments were also widespread, with overall satisfaction exceeding 75% across nearly *all* resident and business subgroups (see *Overall Performance Rating* on page 22).

The high level of satisfaction with the City's performance *in general* was also mirrored in assessments of the City's performance in providing most specific services. Among residents, the highest satisfaction scores were assigned to the City's efforts to provide crossing guards near schools, provide garbage collection services, maintain parks and picnic areas, maintain public landscapes, and provide child safety programs (see *Specific Services: Resident Survey* on page 26). For all but six of the 33 service areas tested, the City is meeting or exceeding the needs and expectations of at least 80% of its residents—and for the majority of services the City is meeting the needs of at least 84% of residents (see Figure 33 on page 42).

The results of the 2021 business survey showed a similar pattern of high satisfaction for the specific services tested. Businesses expressed the highest levels of satisfaction for the City's efforts to provide building permit services, landscape median strips and other areas of the City, maintain local streets and roads, provide business education events, and provide street sweeping services (see *Specific Services: Business Survey* on page 36). For each of the 18 services tested, the City is meeting or exceeding the needs and expectations of at least 84% of local businesses—and for the majority of services the City is meeting the needs of at least 92% of businesses (see Figure 34 on page 42).

Where should the City focus its efforts in the future?

In addition to measuring the City's current performance, a primary 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 the perceived quality of life, local business climate, and resident and business satisfaction with the City are quite high, 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 as well as improve the business climate (see *Ways to Improve Lake Forest* on page 18), the list of services and their respective priority status for future attention (see *Performance Needs & Priorities* on page 40), and the opinions of residents who are generally satisfied with the City's performance versus those generally dissatisfied (see *Differentiators of Opinion: Resident Survey* on page 34), top priorities for residents include maintaining and improving public safety (including neighborhood watch programs and investigating criminal activity), attracting new restaurants and stores, managing growth and development, reducing traffic congestion, and providing recreation and sports programs. For local businesses, top priorities include reducing traffic congestion, promoting and advertising businesses, providing hiring or employee training services, providing business networking events, and providing business watch programs.

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. It may be, for example, that many residents are simply not aware of the City's public safety record, or the limits of what a city can do to reduce traffic congestion. Choosing the appropriate balance of actual service improvements and efforts to raise awareness on these matters 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 satisfaction, the City should not oversteer. Indeed, the primary takeaway from this 2021 study is that the City does many things very well, particularly in the challenging environment of the past year, and the emphasis should be on continuing to perform at a high level in those areas. The vast majority of residents were pleased with the City's efforts to provide services, programs, and facilities and have a favorable opinion of the City's performance in most 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.

What were the most notable changes in the survey results between 2018 and 2021?

As noted above, the City of Lake Forest has continued to receive high marks across its key performance metrics, which is particularly impressive given the challenging events and circumstances of the past year. Many assessments in 2021 remained consistent with the results of the most recent prior study (2018), including ratings of the overall quality of life in the City, the Lake Forest business climate, the City's overall performance rating by residents and business owners, as well as the satisfaction ratings for the vast majority of specific services. Although there was a significant decline (-8%) in the percentage who rated Lake Forest as an excellent or good place to retire in 2021, this finding likely reflects the growing attention paid to the cost of housing and cost of living regionally over the past several years. It is noteworthy, moreover, that those of retirement age living in Lake Forest had a very positive view of the City as a place to retire—it was younger cohorts yet to reach the point of retirement who were less positive.

Although the percentage of residents and businesses satisfied with the City's communication efforts remained the same, the intensity of satisfaction shifted from 2018, with a lower percentage of *very* satisfied and higher percentage of *somewhat* satisfied among both residents and businesses. In a similar way, residents' overall satisfaction with the City's websites was virtually unchanged from the 2018 study (82% vs 83%), but during this period the intensity of satisfaction declined, with the percentage who said they were *very satisfied* reaching a low of 24%.

Turning to satisfaction with specific services, the vast majority of ratings in 2021 were similar to those recorded in 2018. Statistically significant changes were found for seven of the 33 services tested among residents, and none of the 18 services tested among business owners. While reducing traffic congestion remained a top performance need in 2021 for both residents and businesses, the percentage of residents satisfied with the City's efforts to manage traffic congestion increased significantly (+13%) from 2018. During this same period, satisfaction declined for providing recreation programs for special needs children (-10%), investigating criminal activity (-8%), providing neighborhood watch programs (-6%),

providing recycling services (-6%), maintaining a low crime rate (-5%), and providing garbage collection services (-3%).

Are residents and businesses interested in receiving electricity from the City?

Community choice aggregation (CCA), also known as municipal aggregation, are programs that allow local governments to procure power on behalf of their residents, businesses, and municipal accounts from an alternative supplier while still receiving transmission and distribution service from their existing utility. Although the results can vary, CCA programs can lead to lower and more stable electricity rates over time, provide the option to procure a greater amount of energy from renewable sources such as solar, wind and biomass, and allow local jurisdictions more control over their energy supplies. To help inform the City of Lake Forest’s involvement in the Orange County Power Authority’s CCA program, the 2021 survey asked residents and business managers about their interest in receiving electricity from the City (rather than from Southern California Edison) under certain conditions.

The survey results indicate that—provided the CCA arrangement can deliver on one or more of the stated benefits—a large percentage of residents and businesses would be interested in purchasing their electricity from the City of Lake Forest. More specifically, 85% of residents and 84% of local businesses indicated they would be more likely to purchase their electricity from the City of Lake Forest if the rates charged would be lower. More than seven-in-ten residents and businesses also indicated they would be more likely to purchase their electricity from the City if the rates would be more stable over time and/or a greater amount of the electricity would be produced by renewable sources like solar, wind, and biomass. Although still attractive, approximately six-in-ten residents and businesses indicated they would be more likely to purchase electricity from the City if there would be more local control over the type of electricity produced.

Naturally, electricity rates are likely to be a driving factor in residents’ and business owners’ choice of electricity providers. If a rate advantage is removed from the calculus (ie., the cost of electricity is the same), 29% of residents preferred to stay with Southern California Edison, 38% preferred to receive their power from the City, and one-third were unsure (31%) or unwilling to share their preference (2%). Among local businesses, 36% preferred to stay with Southern California Edison under this scenario, 36% preferred to receive their power from the City, and 29% were unsure or unwilling to share their preference.

Are things continuing to change with respect to City-resident communication?

Keeping up with the challenge of communicating with residents and local businesses has been difficult for many public agencies in recent 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.

The 2021 survey results reveal several significant shifts in where residents and business are sourcing Lake Forest news, information and programming, as well as the perceived effectiveness of different methods the City can utilize to communicate. *The Leaflet* not only continues to be the most frequently cited source for Lake Forest news and information among both residents and businesses, it also enjoyed a statistically significant increase in mentions by residents and businesses this cycle. The percentage who turn to social media in both resident and business surveys also increased significantly over the past three years, while reliance on newspapers for Lake Forest news and information declined significantly. Among local businesses, there was a reported decline in use of the City's websites, but this change was offset by a significant increase in the percentage of residents who relied on one or more City websites or apps.

Perhaps the most striking difference between 2018 and 2021 is the increased reliance on social media and websites that are *not* maintained by the City among residents of Lake Forest. Whereas 35% of respondents in 2018 reported using these sources for Lake Forest news and information, the corresponding percentage in 2021 was 55% (+20%). Moreover, these were the dominant information sources among residents who were under 50 years of age (see *Information Sources* on page 58). Naturally, this trend has the potential to create a challenge for the City. The more residents turn to information sources that are not managed by the City for Lake Forest news and information, the more difficult it may be to get the *City's* information and messages widely disseminated and the less residents may recognize the City's efforts to communicate with residents.

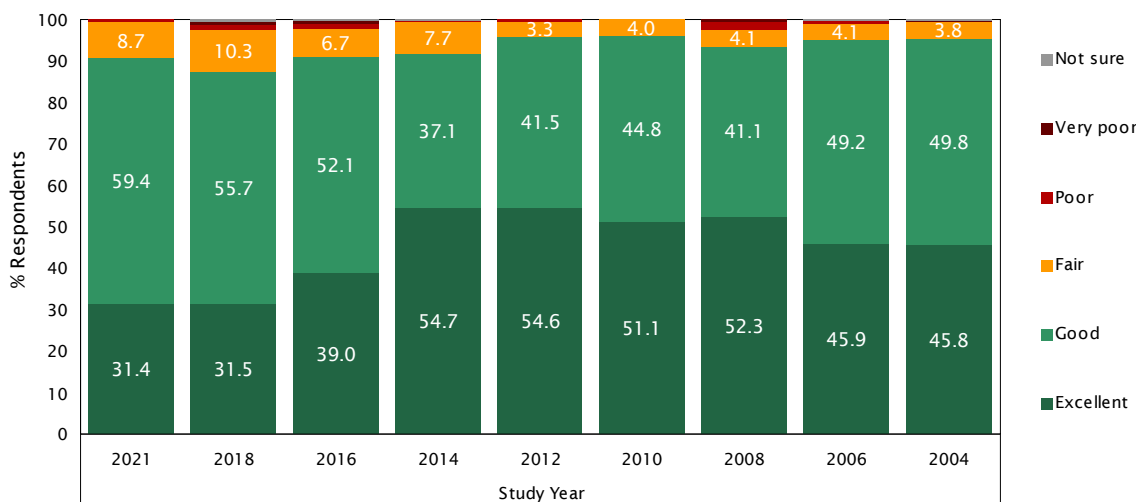
GENERAL PERCEPTION OF CITY & LOCAL ISSUES

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 31% reporting it is excellent and 59% stating it is good. Nine percent (9%) of residents indicated the quality of life in the City is fair, whereas less than 1% used poor or very poor to describe quality of life in the City. Although the combined percentage of those who rated the quality of life in the City as excellent or good climbed between 2018 and 2021, the difference is not statistically significant.

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 BY STUDY YEAR



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, age of the respondent, home ownership status, area of the City, and gender. Although there was some variation in opinion (e.g., residents who had lived in Lake Forest at least 10 years were more likely than their counterparts to rate the quality of life as excellent), the most striking pattern in these figures is the relative consistency of opinion. Regardless of subgroup category, at least eight-in-ten respondents held a 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

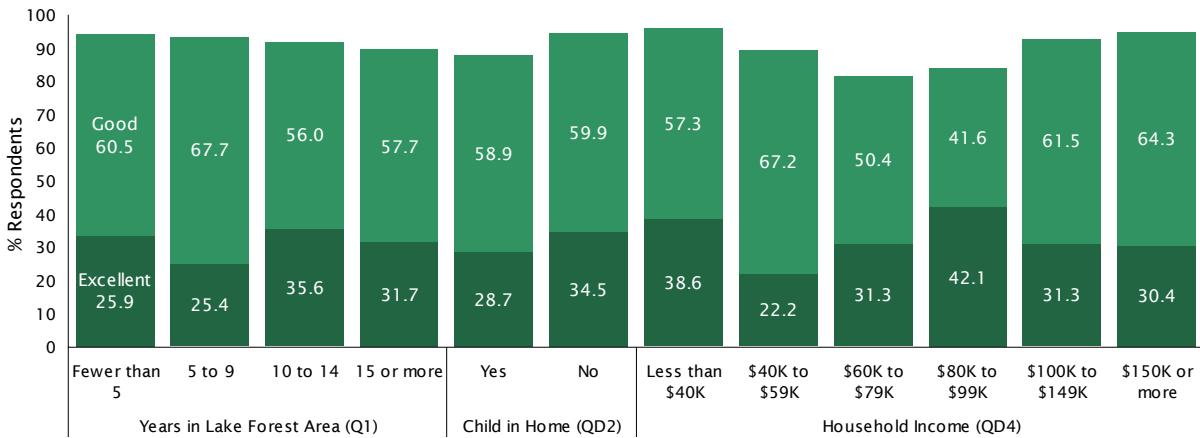
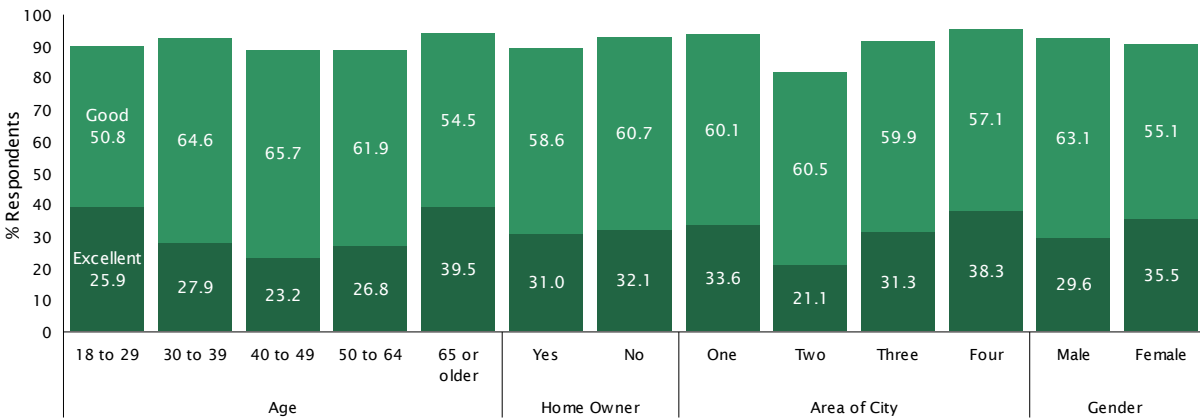


FIGURE 4 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY AGE, HOME OWNER, AREA OF CITY & GENDER

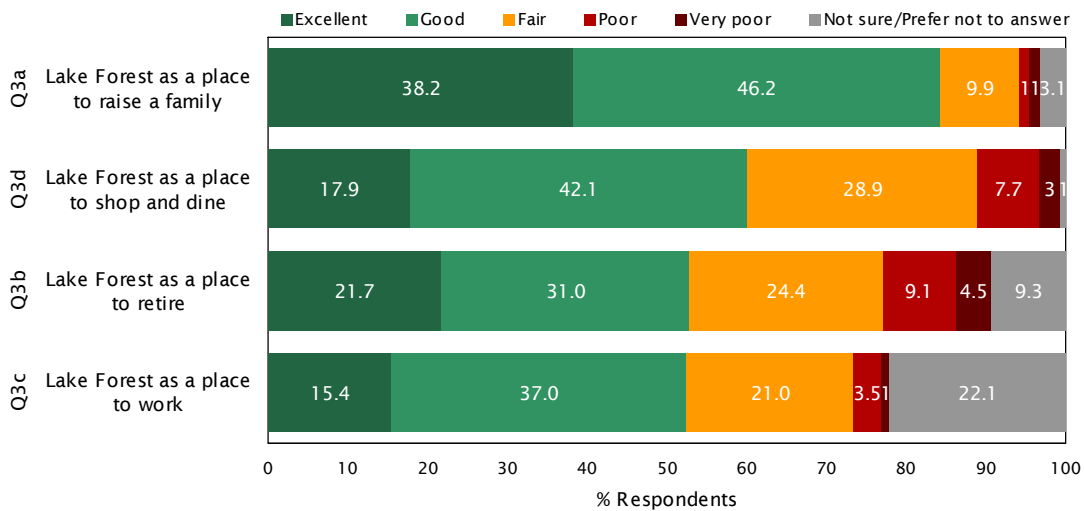


RATING LAKE FOREST Beginning in 2018, residents were also asked to rate the City of Lake Forest on a number of key dimensions related to quality of life—including Lake Forest as a place to raise a family and as a place to work—using the same five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 5 on the next page, residents generally shared favorable opinions of Lake Forest in 2021 on each aspect tested, with the most positive rating provided for Lake Forest as a place to raise a family (84% excellent or good). Although still positive, residents provided somewhat softer ratings for Lake Forest as a place to shop and dine (60%), retire (53%), and work (52%). Approximately one-quarter (22%) of respondents held no opinion or did not provide a rating when asked to assess Lake Forest as a place to work.

When compared with 2018, the percentage who rated Lake Forest as an excellent or good place to retire declined significantly in 2021 (see Table 1). This pattern likely reflects the growing attention paid to the cost of housing/cost of living regionally during this period.

Question 3: Resident Survey How would you rate: _____? Would you say it is excellent, good, fair, poor, or very poor?

FIGURE 5 RATING LAKE FOREST: RESIDENT SURVEY



Tables 2 and 3 show how the ratings for each dimension tested in Question 3 varied by years in the Lake Forest area, age, overall satisfaction with the City’s performance, and household income. Perceptions of Lake Forest as a place to raise a family were quite positive and consistent by years in the area, age, and household income (ranging from 78% to 93%). It is noteworthy that ratings of Lake Forest as a place to retire were most positive among those who were of retirement age and living in the City—it was younger cohorts yet to reach the point of retirement who were less positive. As expected, residents satisfied with the City’s overall performance provided much more favorable ratings for each statement when compared with dissatisfied residents, with the largest gaps evidenced for Lake Forest as a place to raise a family (91% vs. 46%) and retire (59% vs. 20%).

TABLE 1 RATING LAKE FOREST: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Excellent + Good 2018 to 2021 |
|--|------------|------|---|
| | 2021 | 2018 | |
| Lake Forest as a place to shop and dine | 60.0 | 61.0 | -1.1 |
| Lake Forest as a place to raise a family | 84.3 | 85.7 | -1.4 |
| Lake Forest as a place to work | 52.4 | 54.3 | -1.9 |
| Lake Forest as a place to retire | 52.7 | 60.3 | -7.6† |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

TABLE 2 RATING LAKE FOREST: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & AGE (SHOWING % EXCELLENT OR GOOD)

| | Years in Lake Forest Area (Q1) | | | | Age | | | | |
|--|--------------------------------|--------|----------|------------|----------|----------|----------|----------|-------------|
| | Fewer than 5 | 5 to 9 | 10 to 14 | 15 or more | 18 to 29 | 30 to 39 | 40 to 49 | 50 to 64 | 65 or older |
| Lake Forest as a place to raise a family | 86.3 | 79.9 | 84.7 | 85.9 | 86.5 | 93.2 | 84.1 | 78.8 | 83.1 |
| Lake Forest as a place to shop and dine | 61.7 | 64.6 | 60.0 | 56.8 | 66.0 | 63.0 | 48.7 | 55.1 | 67.1 |
| Lake Forest as a place to retire | 62.8 | 51.1 | 47.4 | 49.9 | 48.8 | 53.2 | 41.0 | 44.4 | 74.5 |
| Lake Forest as a place to work | 50.4 | 50.3 | 51.5 | 55.3 | 44.5 | 47.0 | 58.8 | 55.8 | 54.1 |

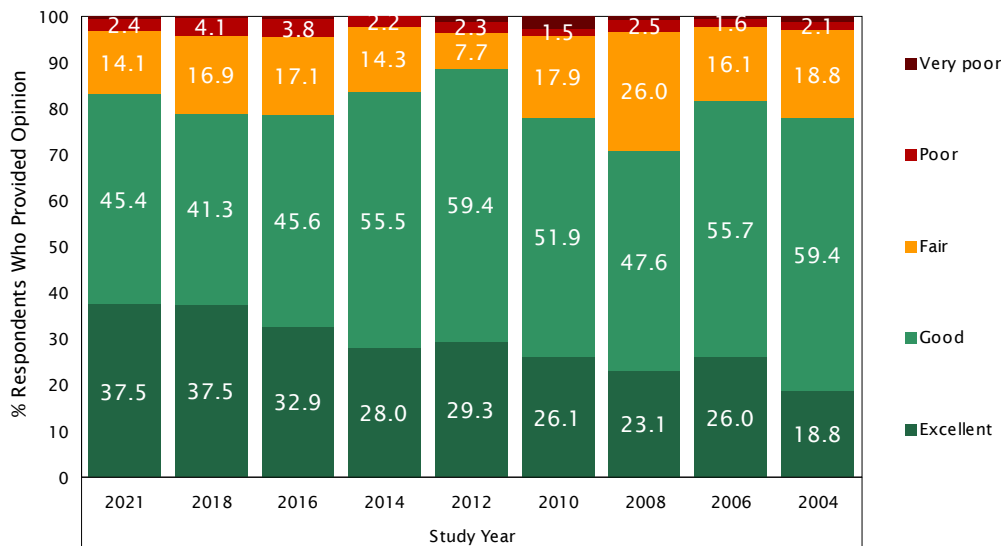
TABLE 3 RATING LAKE FOREST: RESIDENT SURVEY BY OVERALL SATISFACTION & HOUSEHOLD INCOME (SHOWING % EXCELLENT OR GOOD)

| | Overall Satisfaction (Q5) | | Household Income (QD4) | | | | | |
|--|---------------------------|--------------|------------------------|----------------|----------------|----------------|------------------|----------------|
| | Satisfied | Dissatisfied | Less than \$40K | \$40K to \$59K | \$60K to \$79K | \$80K to \$99K | \$100K to \$149K | \$150K or more |
| Lake Forest as a place to raise a family | 91.1 | 46.2 | 83.5 | 81.5 | 77.8 | 82.6 | 87.1 | 86.4 |
| Lake Forest as a place to shop and dine | 66.2 | 31.2 | 55.8 | 70.9 | 56.3 | 60.1 | 61.5 | 56.2 |
| Lake Forest as a place to retire | 58.7 | 19.7 | 62.9 | 63.2 | 54.5 | 59.6 | 60.4 | 44.4 |
| Lake Forest as a place to work | 57.4 | 31.6 | 48.9 | 59.9 | 53.1 | 45.3 | 59.7 | 52.3 |

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 6, most respondents shared a favorable opinion of Lake Forest’s business climate. Overall, 38% reported that it is excellent, 45% said it is good, and 14% offered that it is fair. Only 2% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is poor or very poor. Despite the positive trend from the 2018 business survey, there were no statistically significant changes between the two studies.

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 6 QUALITY OF BUSINESS CLIMATE BY STUDY YEAR: BUSINESS SURVEY



Figures 7 and 8 on the next page 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, anticipated business size in the next year, whether the respondent was also a Lake Forest resident, the number of individuals employed at their business, if any of their employees live outside the City of Lake Forest, and if the business is home-based. More than seven-in-ten respondents in each subgroup rated the business climate as excellent or good.

FIGURE 7 QUALITY OF BUSINESS CLIMATE: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, & BUSINESS SIZE IN NEXT 12 MONTHS & LAKE FOREST

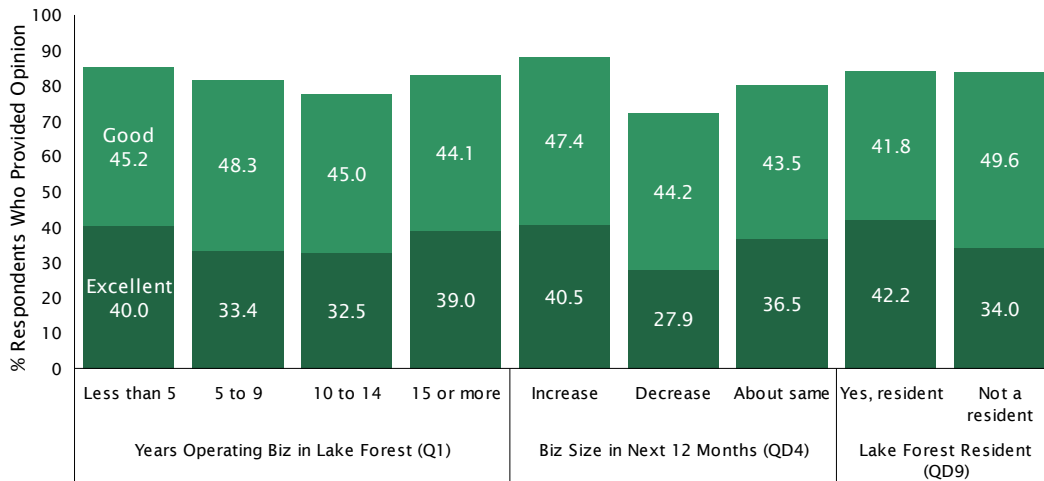
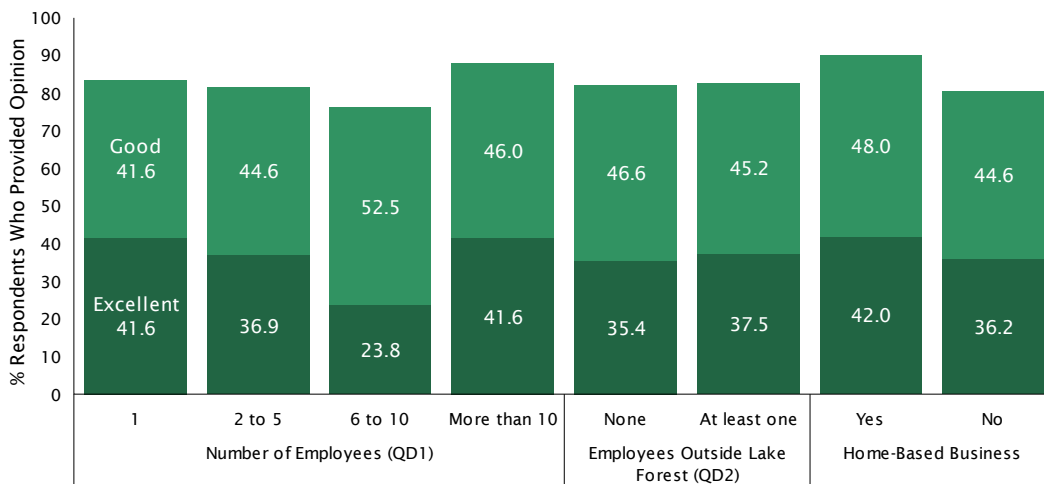


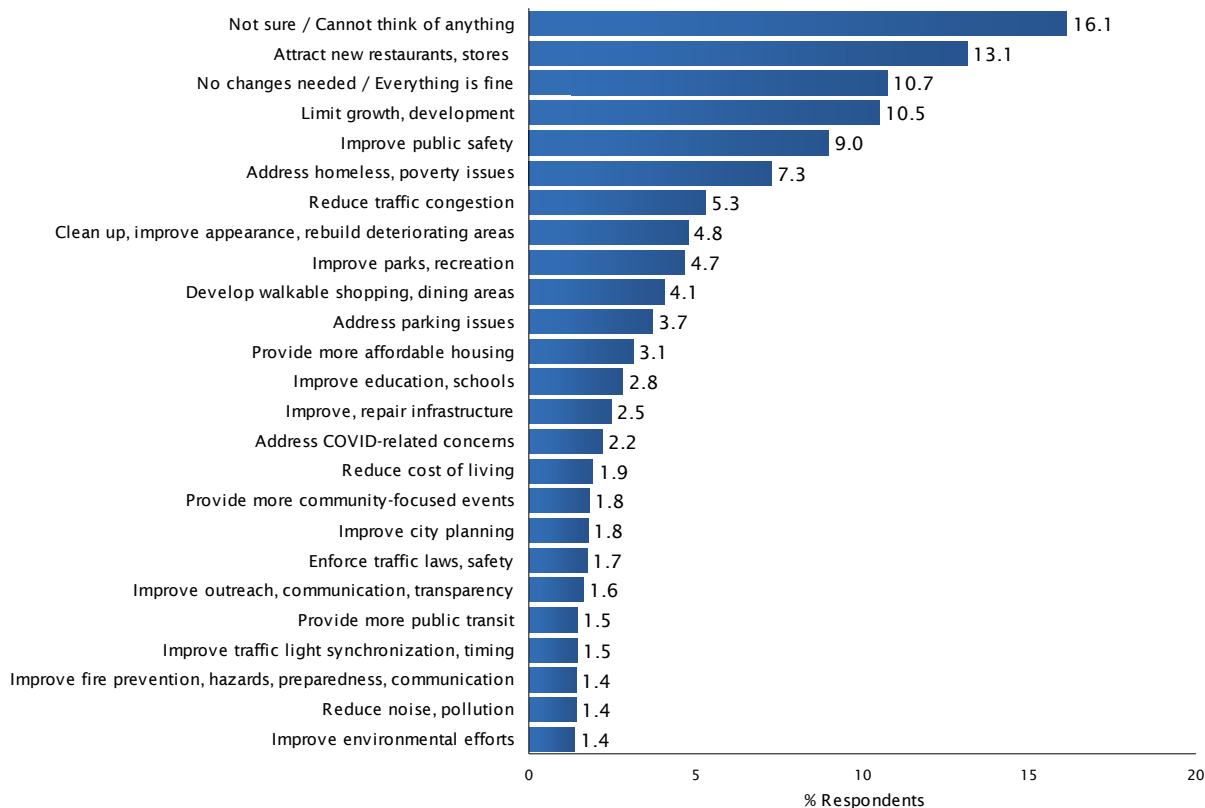
FIGURE 8 QUALITY OF BUSINESS CLIMATE: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST & HOME-BASED BUSINESS



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 figures 9 and 10.

Question 4: 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 9 CHANGES TO IMPROVE CITY: RESIDENT SURVEY



As shown in Figure 9 above, 27% of residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (16%) or desired no changes from the City (11%). Of the specific suggestions, the most common were attracting new restaurants and stores (13%), limiting growth and development (11%), improving public safety (9%), addressing homelessness/poverty issues (7%), and reducing traffic congestion (5%). No other single improvements were mentioned by at least 5% of respondents.

As shown in Table 4 on the next page, 2021 witnessed several shifts in the changes that residents think are most needed to improve the quality of life in Lake Forest. Residents placed more emphasis on attracting retail stores and restaurants to the City and public safety this cycle, while concerns about traffic congestion waned.

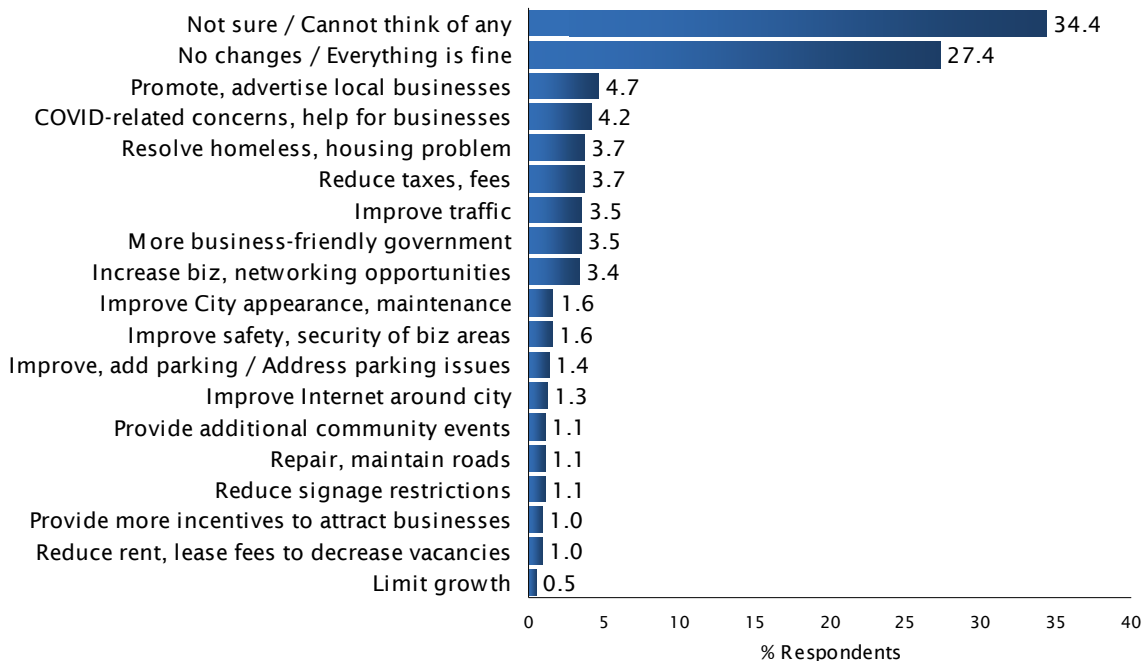
TABLE 4 CHANGES TO IMPROVE CITY: RESIDENT SURVEY BY STUDY YEAR

| 2021 | 2018 | Study Year 2016 | 2014 | 2012 |
|--|--|--|--|--|
| Not sure / Cannot think of anything | Not sure / Cannot think of anything | Not sure / Cannot think of anything | Not sure / Cannot think of anything | No changes needed / Everything is fine |
| Attract new restaurants, stores | Limit growth, development | Reduce traffic congestion | No changes needed / Everything is fine | Improve parks, recreation |
| No changes needed / Everything is fine | Attract new restaurants, stores | No changes needed / Everything is fine | Reduce traffic congestion | Not sure / Cannot think of anything |
| Limit growth, development | Reduce traffic congestion | Limit growth, development | Improve parks, recreation | Reduce traffic congestion |
| Improve public safety | No changes needed / Everything is fine | Improve, repair infrastructure | Limit growth, development | Improve, repair infrastructure |

When asked what the City could do to improve the business climate in Lake Forest (Figure 10), approximately six-in-ten business managers surveyed indicated that no changes were needed (27%) or were unsure of a change that could be made (34%). Specific suggestions for improving the business climate included promoting/advertising local businesses (5%), addressing COVID-related concerns/helping businesses (4%), addressing homelessness/housing related issues (4%), reducing taxes/fees (4%), improving traffic flow (4%), and pursuing business-friendly policies (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 10 CHANGES TO IMPROVE BUSINESS CLIMATE: BUSINESS SURVEY



As shown in Table 5, three of the top five mentions by business managers remained unchanged from 2018. New in 2021 were mentions of addressing homelessness and, not surprisingly, addressing COVID-related concerns.

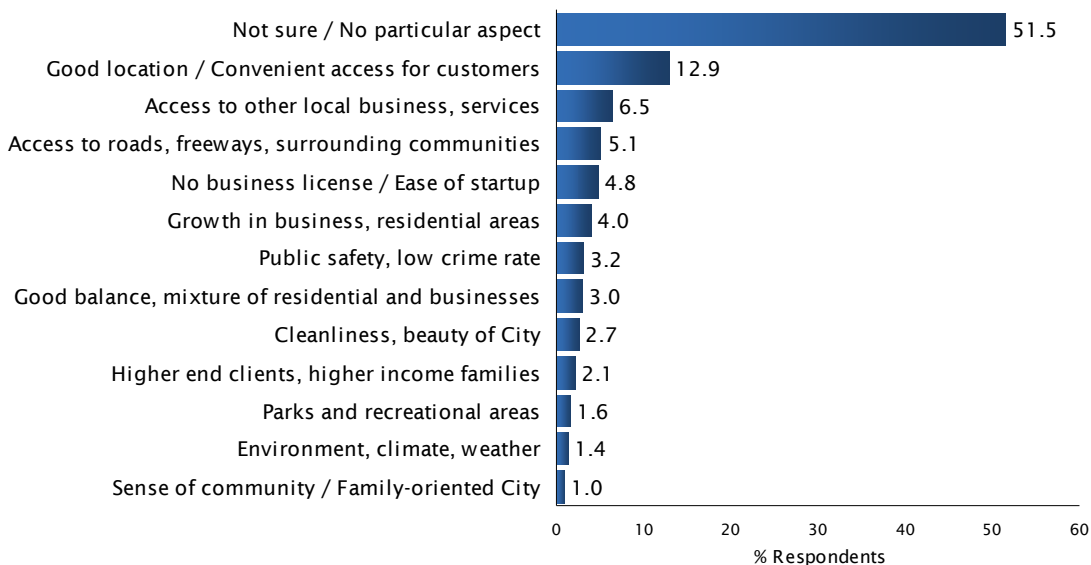
TABLE 5 CHANGES TO IMPROVE BUSINESS CLIMATE: BUSINESS SURVEY BY STUDY YEAR

| 2021 | 2018 | Study Year 2016 | 2014 | 2012 |
|---|-------------------------------------|--|--|--|
| Not sure / Cannot think of any | No changes / Everything is fine | Not sure / Cannot think of any | Not sure / Cannot think of any | Not sure / Cannot think of any |
| No changes / Everything is fine | Not sure / Cannot think of any | No changes / Everything is fine | No changes / Everything is fine | No changes / Everything is fine |
| Promote, advertise local businesses | Promote, advertise local businesses | Increase biz, networking opportunities | Increase biz, networking opportunities | Increase biz, networking opportunities |
| COVID-related concerns, help for businesses | Improve, add parking | Fewer restrictions/regulations | Improve, add parking | Reduce signage restrictions |
| Resolve homeless, housing problem | Reduce taxes, fees | Reduce signage restrictions | Prefer not to answer | Reduce taxes, fees |

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 11.

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

FIGURE 11 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS: BUSINESS SURVEY

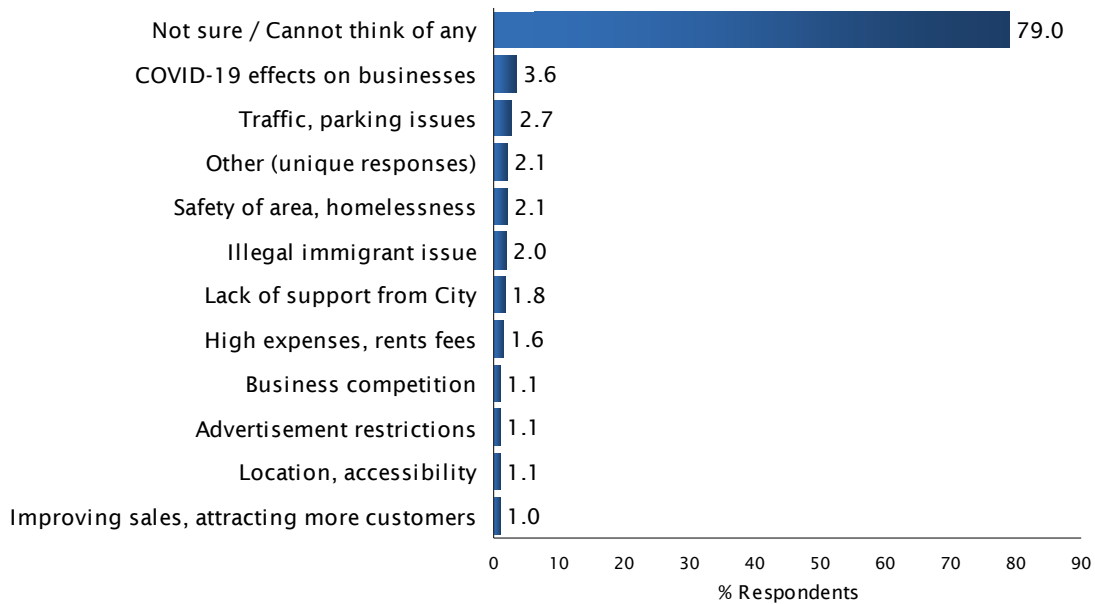


Mentioned by more than half of business managers surveyed, the most common response was that there were no particular features of Lake Forest that benefit their business, or that they could not think of any at the time of the interview (52%). Among specific aspects mentioned, having a convenient, easily-accessible location within the City (13%), access to other local businesses and services (7%), access to roads, freeways, and surrounding communities (5%), and no business license requirement/ease of start-up (5%) were mentioned most often.

CHALLENGES OF DOING BUSINESS IN LAKE FOREST All business managers were next 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 12. Eight-in-ten (79% of) business managers surveyed said they could not think of any challenges associated with doing business in Lake Forest. The most common specific challenges cited were COVID-19 related concerns (4%), traffic and parking issues (3%), public safety/homelessness concerns (2%), and illegal immigration issues (2%). No other specific challenge was mentioned by more than 2% of business managers surveyed.

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

FIGURE 12 CHALLENGES WITH DOING BUSINESS IN LAKE FOREST: BUSINESS SURVEY



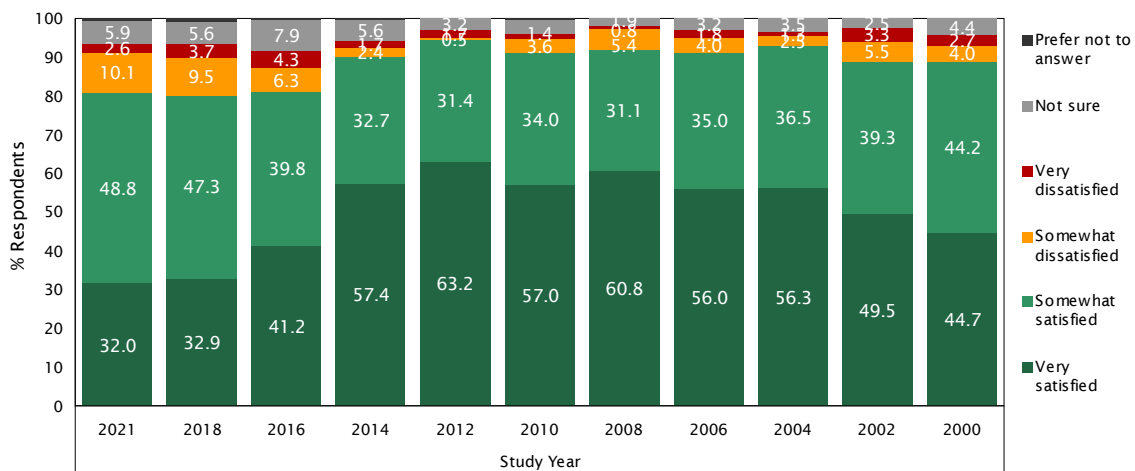
OVERALL PERFORMANCE RATING Both residents and businesses were asked to rate the job the City of Lake Forest is doing to provide municipal services. Because this question does not reference a specific program, facility, or service and requested that the respondent consider the City’s performance in general,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

Figure 13 presents the results of this question for the resident survey for 2021 and for prior surveys dating back to 2000, whereas Figure 16 on the next page presents the corresponding results for the business survey. In both cases, the vast majority of respondents said they were satisfied with the City of Lake Forest’s efforts to provide municipal services. Specifically, 81% of residents and 91% of local businesses indicated that they were satisfied in this respect in 2021.

Despite the pandemic and the many changes it has compelled for municipal operations during the past year, resident satisfaction with the City’s overall performance in 2021 remained strikingly similar to the levels recorded in 2018—there were no statistically significant changes. Among business respondents, the percentage satisfied increased from 2018 to 2021, although it did not meet the threshold for statistical significance.

Question 5: Resident Survey *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

FIGURE 13 OVERALL SATISFACTION: RESIDENT SURVEY BY STUDY YEAR



Figures 14 and 15 display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 17 and 18 present similar information for the business community. Overall satisfaction was consistently high (75%+) across resident subgroups, with the exception of dips among those earning \$40,000 to \$59,999 annually and residents of Area 2. Among Lake Forest businesses, overall satisfaction was consistently high across subgroups, ranging from a low of 85% to a high of 94%.

FIGURE 14 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, CHILD IN HOME & HOUSEHOLD INCOME

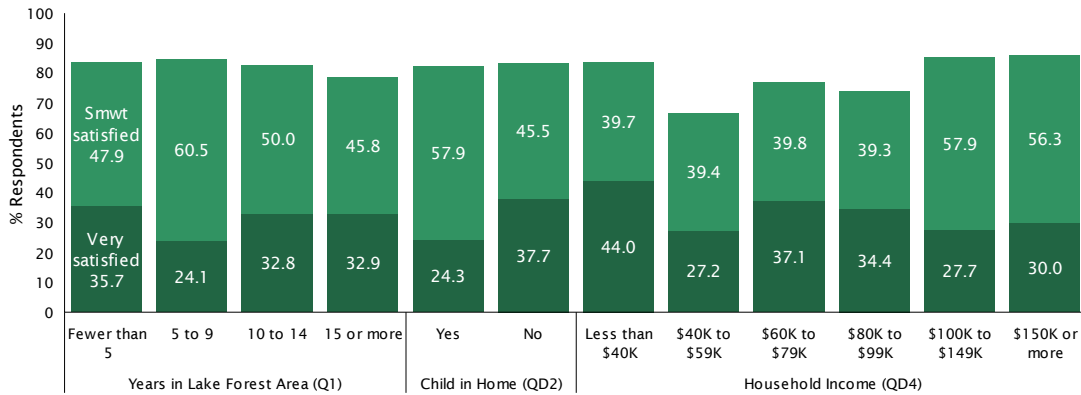
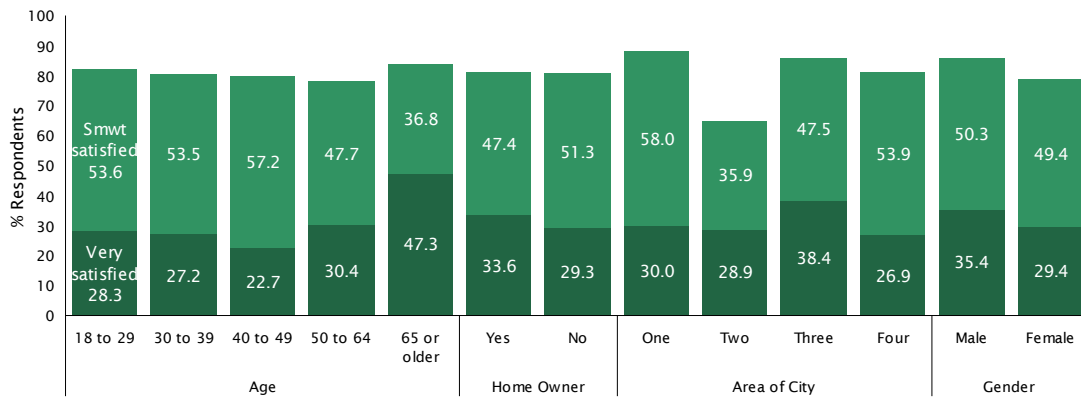


FIGURE 15 OVERALL SATISFACTION: RESIDENT SURVEY BY AGE, HOME OWNER, AREA OF CITY & GENDER



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 16 OVERALL SATISFACTION: BUSINESS SURVEY BY STUDY YEAR

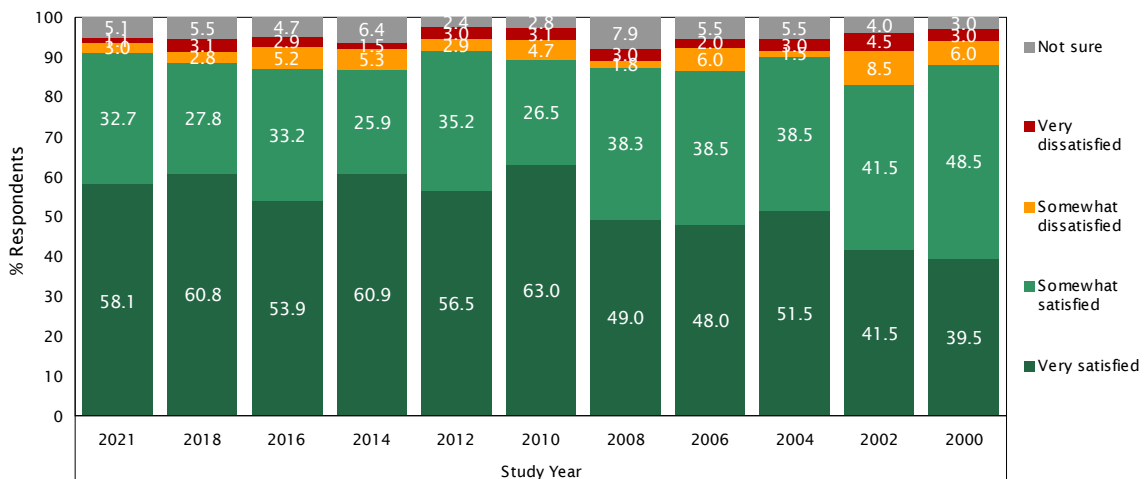


FIGURE 17 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, BUSINESS SIZE IN THE NEXT 12 MONTHS & LAKE FOREST RESIDENT

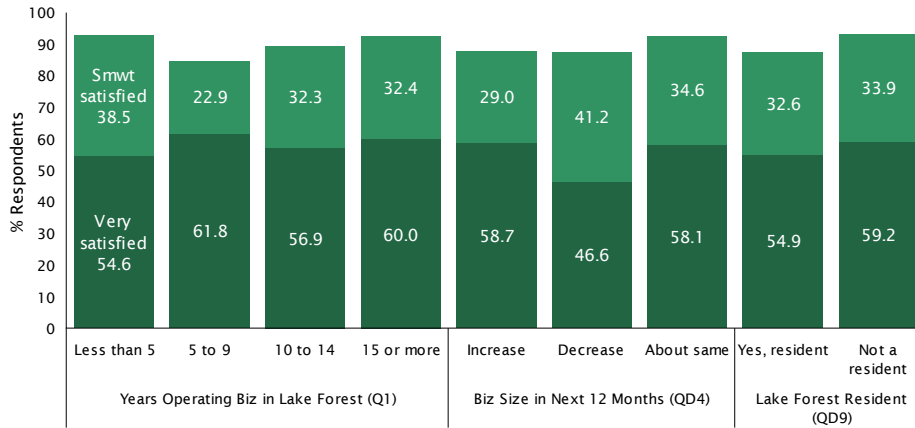
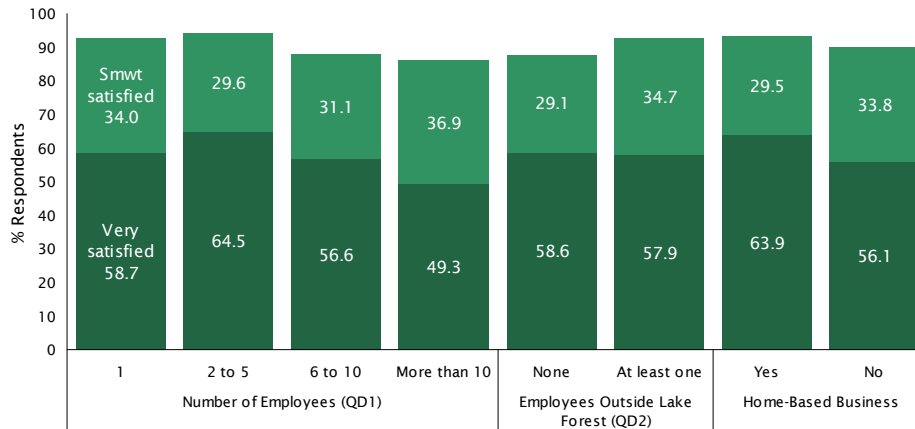


FIGURE 18 OVERALL SATISFACTION: BUSINESS SURVEY BY LAKE FOREST RESIDENT, NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST & HOME-BASED BUSINESS



SPECIFIC SERVICES: RESIDENT SURVEY

Whereas Question 5 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 too 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 19 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 (95%) and preparing for emergencies (90%). At the other end of the spectrum, providing animal control services (54%) was viewed as less important. Table 6 on the next page displays the percentage of respondents who viewed each service as extremely or very important for 2021 and 2018, as well as the difference between the two studies. There were no statistically significant differences during this period.

Question 6: 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 19 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY

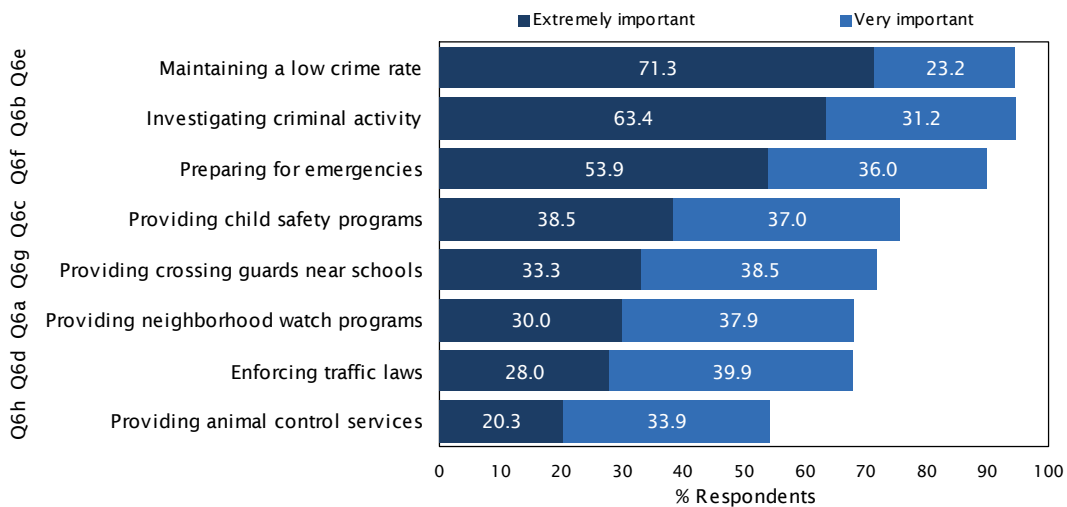


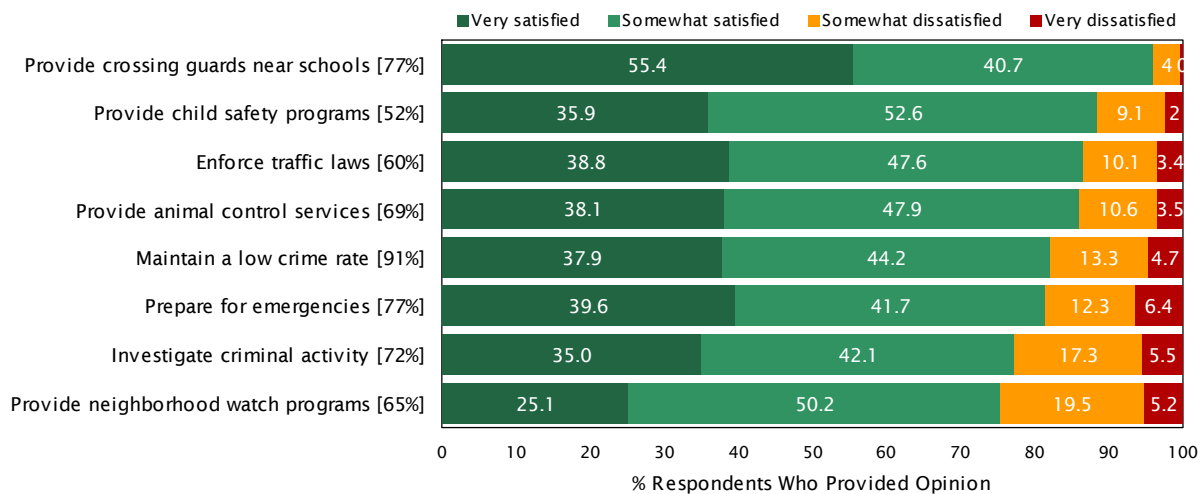
TABLE 6 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2021 | 2018 | |
| Providing neighborhood watch programs | 68.0 | 64.4 | +3.6 |
| Preparing for emergencies | 90.0 | 86.7 | +3.2 |
| Providing child safety programs | 75.6 | 72.6 | +3.0 |
| Providing animal control services | 54.2 | 52.8 | +1.4 |
| Investigating criminal activity | 94.6 | 93.9 | +0.7 |
| Providing crossing guards near schools | 71.8 | 73.1 | -1.3 |
| Maintaining a low crime rate | 94.6 | 95.9 | -1.4 |
| Enforcing traffic laws | 67.9 | 72.3 | -4.4 |

Turning to the satisfaction component, Figure 20 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 20—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 77% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 55% were very satisfied and 41% were somewhat satisfied. This reporting convention is followed for all departments for the resident and business surveys.

Question 7: 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 20 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY



Satisfaction was high for all police services tested. Overall, respondents were most satisfied with the Department’s efforts to provide crossing guards near schools (96% very or somewhat satisfied), provide child safety programs (89%), enforce traffic laws (86%), and provide animal control services (86%). Table 7 on the next page shows how the 2021 results compare with the 2018 study. During this period, there were statistically significant reductions in satisfaction with

efforts to investigate criminal activity (-8%), provide neighborhood watch programs (-6%), and maintain a low crime rate (-5%).

TABLE 7 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Satisfaction |
|--------------------------------------|------------|------|------------------------|
| | 2021 | 2018 | |
| Enforce traffic laws | 86.5 | 82.9 | +3.5 |
| Provide crossing guards near schools | 96.1 | 94.6 | +1.4 |
| Provide animal control services | 86.0 | 87.0 | -1.1 |
| Prepare for emergencies | 81.3 | 84.3 | -3.0 |
| Provide child safety programs | 88.5 | 91.4 | -3.0 |
| Maintain a low crime rate | 82.1 | 86.7 | -4.7† |
| Provide neighborhood watch programs | 75.3 | 81.6 | -6.3† |
| Investigate criminal activity | 77.2 | 85.5 | -8.3† |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

DEVELOPMENT SERVICES DEPARTMENT Figure 21 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 (63%), followed by enforcing zoning regulations (59%), issuing building permits (55%), and enforcing sign regulations (51%). When compared with 2018, there were no statistically significant changes in the perceived importance of these services (see Table 8).

Question 8: 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 21 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY

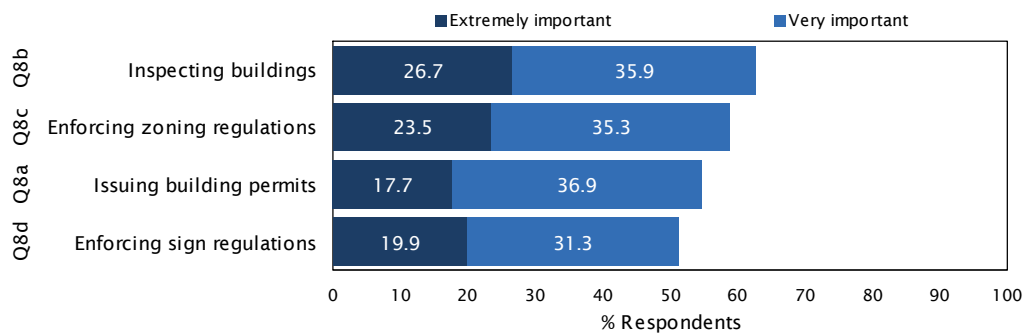


TABLE 8 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Extremely + Very Important |
|------------------------------|------------|------|--------------------------------------|
| | 2021 | 2018 | |
| Enforcing sign regulations | 51.3 | 50.4 | +0.9 |
| Enforcing zoning regulations | 58.8 | 59.3 | -0.5 |
| Issuing building permits | 54.7 | 57.9 | -3.2 |
| Inspecting buildings | 62.5 | 67.2 | -4.6 |

Figure 22 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 79% for enforcing zoning regulations to a high of 86% for inspecting buildings. There were no statistically significant changes between the 2018 and 2021 studies (see Table 9). Table 10 displays satisfaction among residents who reported that they had (or had not) personally used services offered by the Department in the past year. Satisfaction with enforcing zoning regulations was the biggest differentiator between the two groups.

Question 9: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion?*

FIGURE 22 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY

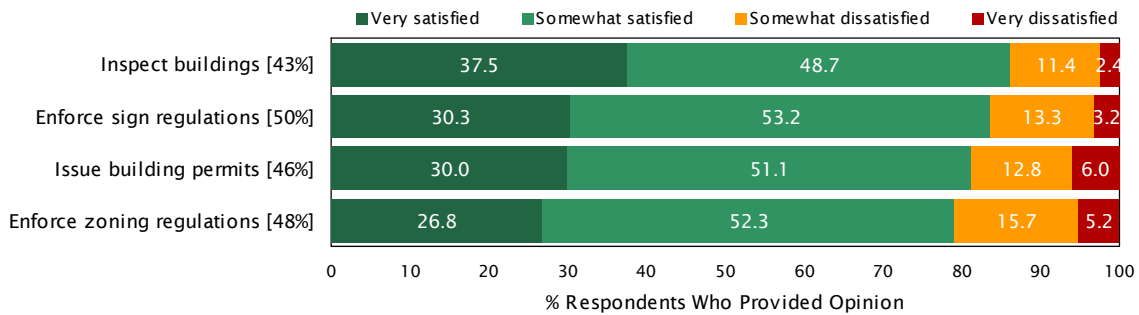


TABLE 9 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Satisfaction |
|----------------------------|------------|------|------------------------|
| | 2021 | 2018 | |
| Enforce zoning regulations | 79.1 | 73.9 | +5.2 |
| Issue building permits | 81.2 | 76.0 | +5.2 |
| Inspect buildings | 86.1 | 86.6 | -0.5 |
| Enforce sign regulations | 83.6 | 85.6 | -2.0 |

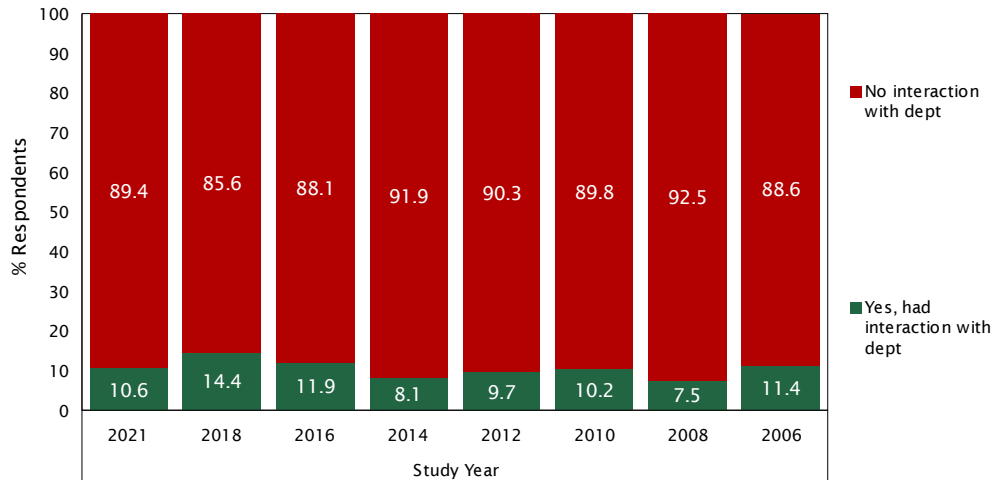
TABLE 10 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR

| | Interacted With Development Services Department in Past Year | | Difference in Satisfaction |
|----------------------------|--|------|----------------------------|
| | Yes | No | |
| Issue building permits | 75.9 | 82.3 | -6.5 |
| Inspect buildings | 80.4 | 87.5 | -7.1 |
| Enforce sign regulations | 70.5 | 85.4 | -15.0 |
| Enforce zoning regulations | 59.9 | 81.8 | -21.9 |

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 23 on the next page, just 11% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey in 2021, which is statistically comparable to the findings of past surveys in general.

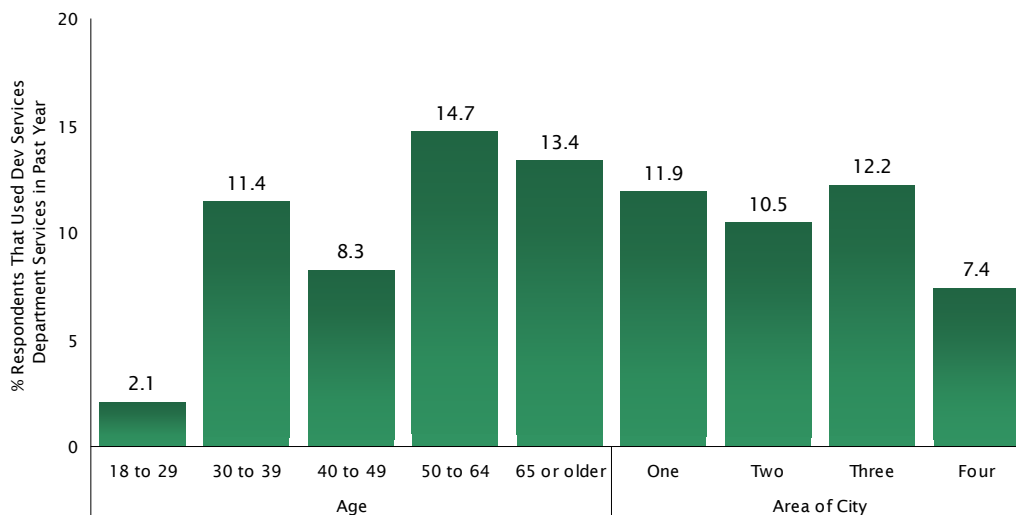
Question 10: Resident Survey *In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?*

FIGURE 23 INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR: RESIDENT SURVEY BY STUDY YEAR



When compared with their respective counterparts, interaction with the Development Services Department during this period was most frequently reported by residents 50 years of age or older and those residing in Areas 1, 2 and 3 of the City (see Figure 24).

FIGURE 24 INTERACTED WITH DEVELOPMENT SERVICES IN PAST YEAR: RESIDENT SURVEY BY AGE & AREA OF CITY



PUBLIC WORKS DEPARTMENT Figure 25 on the next page presents the importance that residents assigned to ten services provided by the Public Works Department, sorted in order of importance. Overall, garbage collection services was viewed as the most important service (95%), followed by maintaining local streets and roads (94%), and maintaining parks and picnic areas (89%). When compared with 2018, there were statistically significant increases in the perceived importance of two services: providing bike paths and pedestrian facilities (+8%) and providing recycling services (+7%) (see Table 11).

Question 11: 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 25 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY

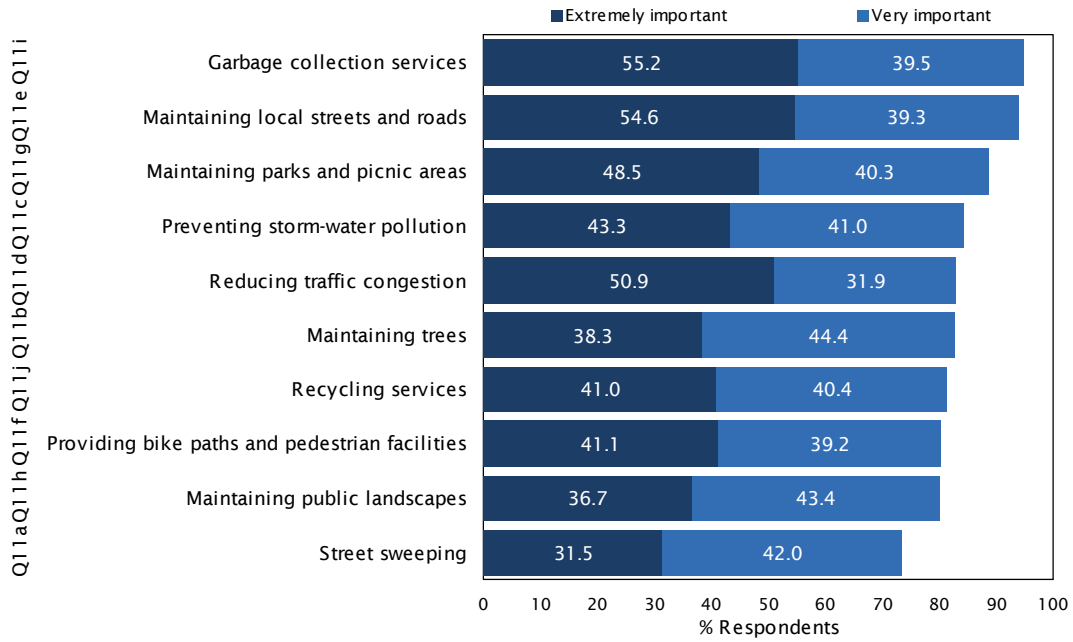


TABLE 11 IMPORTANCE OF PUBLIC WOKS SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2021 | 2018 | |
| Providing bike paths and pedestrian facilities | 80.3 | 72.5 | +7.8† |
| Providing recycling services | 81.4 | 74.2 | +7.2† |
| Street sweeping | 73.5 | 68.5 | +5.0 |
| Maintaining public landscapes | 80.1 | 75.6 | +4.5 |
| Maintaining trees | 82.7 | 79.6 | +3.2 |
| Maintaining parks and picnic areas | 88.8 | 85.9 | +3.0 |
| Preventing storm-water pollution | 84.4 | 81.9 | +2.5 |
| Providing garbage collection services | 94.7 | 93.1 | +1.6 |
| Maintaining local streets and roads | 93.9 | 95.2 | -1.3 |
| Reducing traffic congestion | 82.8 | 86.5 | -3.7 |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

Figure 26 on the next page 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 parks and picnic areas (91%), and maintain public landscapes (91%). Table 12 on the next page shows how the measured satisfaction with Public Works services differed between the 2018 and 2021 surveys, with one statistically significant increase in satisfaction (reduce traffic congestion) and two significant declines (recycling services and garbage collection services) during this period.

Question 12: Resident Survey *Are you satisfied or dissatisfied with the City's efforts to: -----, or do you not have an opinion?*

FIGURE 26 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY

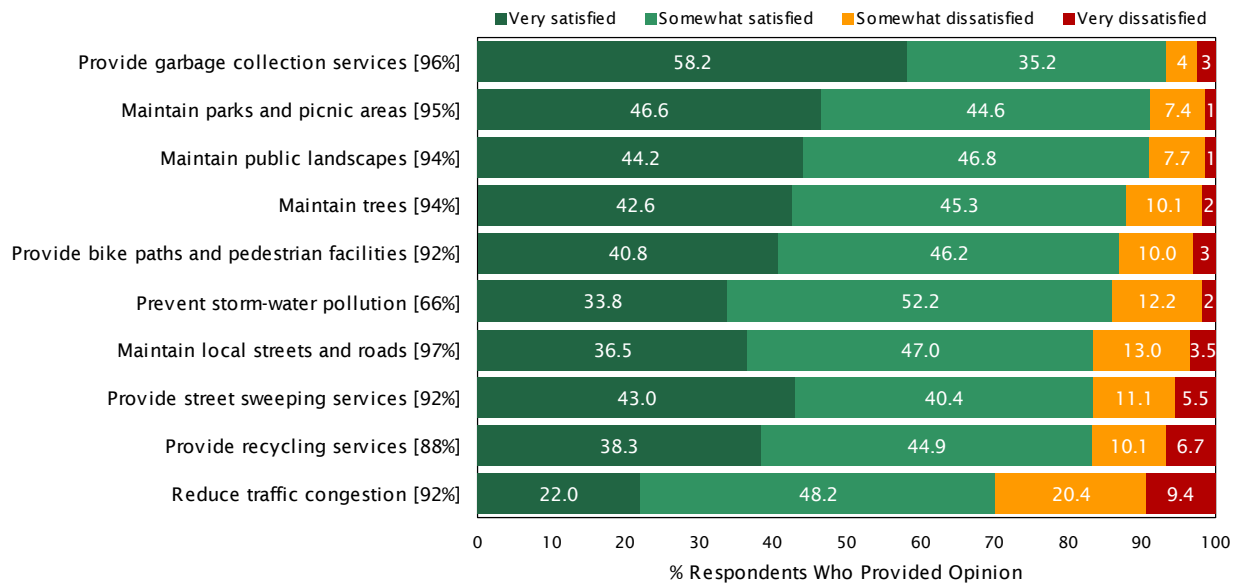


TABLE 12 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Satisfaction |
|--|------------|------|------------------------|
| | 2021 | 2018 | |
| Reduce traffic congestion | 70.2 | 57.2 | +13.0† |
| Maintain public landscapes | 91.0 | 88.4 | +2.6 |
| Provide bike paths and pedestrian facilities | 87.0 | 84.6 | +2.4 |
| Maintain parks and picnic areas | 91.2 | 89.5 | +1.7 |
| Maintain trees | 87.9 | 88.0 | -0.0 |
| Maintain local streets and roads | 83.5 | 83.7 | -0.2 |
| Prevent storm-water pollution | 86.0 | 88.2 | -2.2 |
| Provide street sweeping services | 83.4 | 86.4 | -3.0 |
| Provide garbage collection services | 93.4 | 96.8 | -3.4† |
| Provide recycling services | 83.2 | 89.0 | -5.7† |

† Statistically significant difference ($p < 0.05$) between the 2018 and 2021 studies.

COMMUNITY SERVICES DEPARTMENT In a format identical to that used in questions 6, 8, and 11, Question 13 asked residents to indicate the level of importance they associated with services provided by the Community Services Department. Figure 27 on the next page presents each of the services tested, sorted by order of importance.

Residents assigned the highest importance to providing recreation programs for special needs children (71%), followed by providing recreation and sports programs for teens (67%), providing special events like concerts in the park and the Fourth of July Parade (65%), and providing recreation and sports programs for elementary school-aged children (64%). Comparatively, providing adult sport programs (45%) and adult recreation programs such as classes, concerts, and trips (51%) were viewed as less important. There was one statistically significant change from 2018 to 2021 among the 11 community services, an 8 percentage point increase in the importance of providing adult sports programs (Table 13 on next page).

Question 13: 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 27 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY

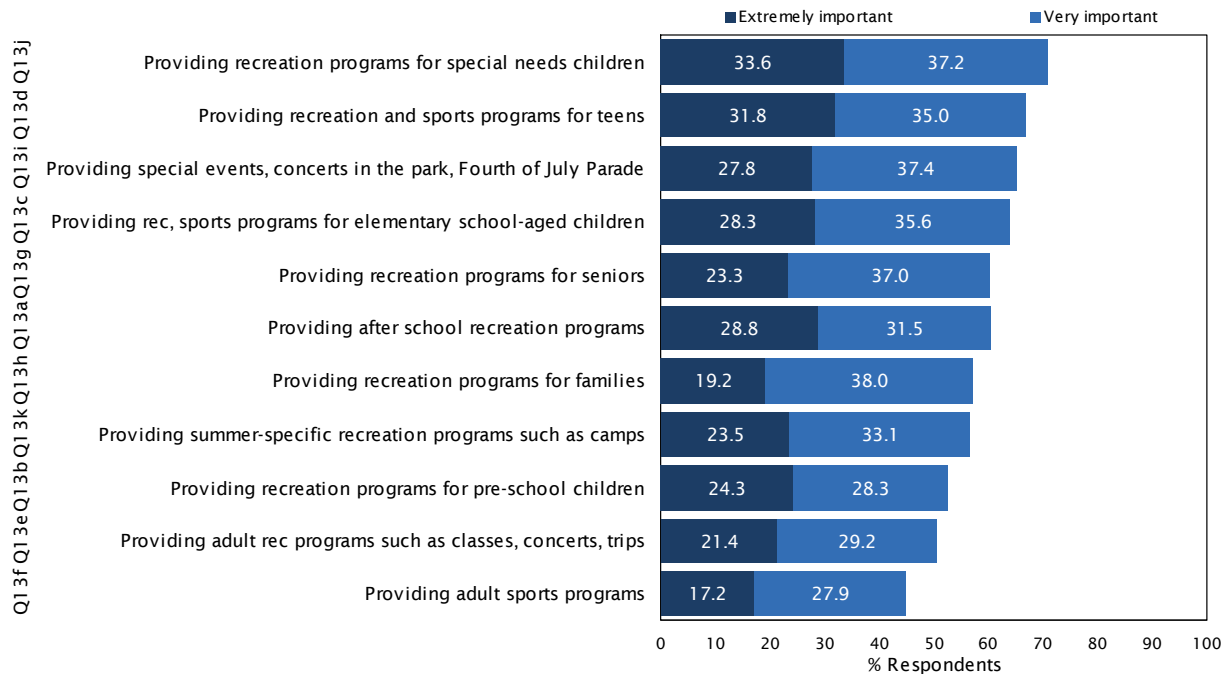


TABLE 13 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2021 | 2018 | |
| Providing adult sports programs | 45.1 | 37.4 | +7.7† |
| Providing adult rec programs | 50.6 | 46.2 | +4.3 |
| Providing recreation programs for preschoolers | 52.6 | 49.6 | +3.0 |
| Providing special events like concerts in the park | 65.2 | 62.9 | +2.3 |
| Providing recreation programs for families | 57.2 | 55.0 | +2.2 |
| Providing summer-specific rec programs | 56.6 | 54.8 | +1.8 |
| Providing recreation programs for seniors | 60.3 | 59.1 | +1.2 |
| Providing after school recreation programs | 60.3 | 60.0 | +0.3 |
| Providing rec programs for special needs children | 70.7 | 70.6 | +0.1 |
| Providing rec, sports for elementary children | 63.9 | 64.3 | -0.4 |
| Providing rec, sports for teens | 66.8 | 68.2 | -1.4 |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

When asked about their satisfaction with the same list of services (Figure 28 on the next page), at least three-quarters of residents who held an opinion indicated that they were satisfied with every service tested. Residents expressed the highest levels of satisfaction with the Department's efforts to provide recreation and sports programs for elementary school-aged children (86%), special events like concerts in the park and the Fourth of July Parade (84%), and summer-specific recreation programs such as camps (84%). Residents were somewhat less satisfied with the Department's efforts to provide recreation programs for special needs children (75%) and

sports programs for adults (76%). When compared with the results from 2018, there was one statistically significant decline in satisfaction with the City’s efforts to provide community services (see Table 14).

Question 14: 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 28 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY

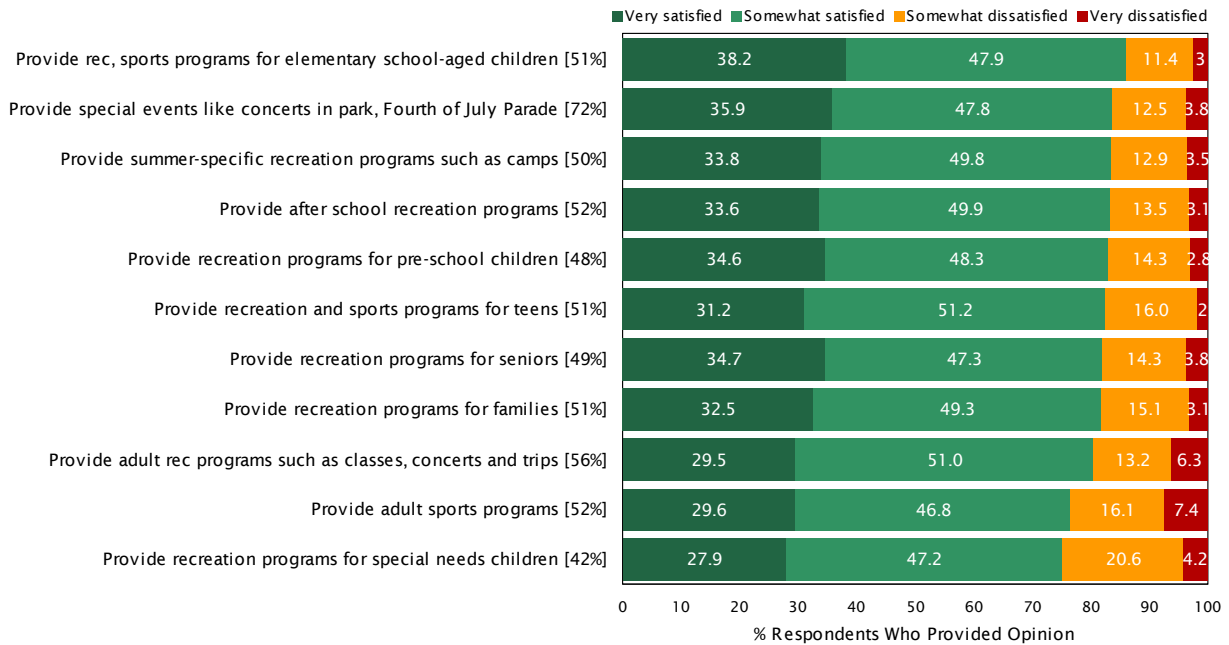


TABLE 14 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY BY STUDY YEAR

| | Study Year | | Change in Satisfaction |
|--|------------|------|------------------------|
| | 2021 | 2018 | |
| Provide adult rec programs | 80.5 | 76.5 | +4.0 |
| Provide adult sports programs | 76.5 | 75.6 | +0.9 |
| Provide recreation programs for families | 81.8 | 80.9 | +0.8 |
| Provide rec, sports for teens | 82.3 | 82.1 | +0.2 |
| Provide after school recreation programs | 83.4 | 85.0 | -1.5 |
| Provide recreation programs for seniors | 81.9 | 84.2 | -2.3 |
| Provide summer-specific rec programs | 83.6 | 86.1 | -2.4 |
| Provide rec, sports for elementary children | 86.1 | 89.0 | -2.9 |
| Providing special events like concerts in the park | 83.7 | 88.4 | -4.7 |
| Provide recreation programs for preschoolers | 82.9 | 88.0 | -5.1 |
| Provide rec programs for special needs children | 75.2 | 85.0 | -9.8† |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

DIFFERENTIATORS OF OPINION: RESIDENT SURVEY For the interested reader, Table 15 on the next page displays how the level of satisfaction with each specific service tested in questions 7, 9, 12, and 14 varied according to residents’ overall performance ratings for the City (see *Overall Performance Rating* on page 22). The table divides residents who were satisfied with the City’s *overall performance* into one group and those dissatisfied into a second group. Also displayed is the difference between the two groups in terms of the percentage who indi-

cated they were satisfied with the City’s efforts to provide each service tested (far right column). For convenience, the services are sorted by that difference, with the greatest differentiators of opinion near the top of the table.

When compared with their counterparts, those who were satisfied with the City’s *overall* performance in providing city services were also more likely to express satisfaction with the City’s efforts to provide every service tested. That said, the greatest specific differentiators of opinion between satisfied and dissatisfied residents were found with respect to the City’s efforts to investigate criminal activity, maintain a low crime rate, provide neighborhood watch programs, enforce sign regulations, and enforce zoning regulations.

At the other end of the spectrum, there was much less difference between the two resident groups regarding their satisfaction with the City’s efforts provide crossing guards near schools, recycling services, adult sports programs, and garbage collection services.

TABLE 15 SATISFACTION WITH SERVICES BY OVERALL SATISFACTION WITH CITY: RESIDENT SURVEY

| | | Satisfaction With City's Overall Performance (Q5) | | Difference Between Groups For Each Service |
|---|--|---|-------------------------------|--|
| | | Very or somewhat satisfied | Very or somewhat dissatisfied | |
| % Respondents Satisfied With Each Service | Investigate criminal activity | 84.0 | 44.4 | 39.6 |
| | Maintain a low crime rate | 87.4 | 48.3 | 39.2 |
| | Provide neighborhood watch programs | 81.4 | 45.8 | 35.6 |
| | Enforce sign regulations | 88.4 | 53.6 | 34.8 |
| | Enforce zoning regulations | 84.7 | 50.7 | 34.0 |
| | Provide rec programs for special needs children | 81.1 | 47.5 | 33.6 |
| | Provide summer-specific rec programs | 89.2 | 55.6 | 33.6 |
| | Prepare for emergencies | 86.1 | 52.6 | 33.5 |
| | Provide rec, sports for elementary children | 91.9 | 58.9 | 33.0 |
| | Provide recreation programs for seniors | 87.4 | 55.0 | 32.5 |
| | Provide recreation programs for families | 87.5 | 55.2 | 32.3 |
| | Inspect buildings | 91.1 | 59.5 | 31.5 |
| | Provide after school recreation programs | 88.9 | 57.7 | 31.2 |
| | Maintain public landscapes | 95.1 | 65.3 | 29.8 |
| | Enforce traffic laws | 90.6 | 64.1 | 26.5 |
| | Maintain trees | 90.9 | 67.4 | 23.6 |
| | Maintain parks and picnic areas | 94.6 | 71.4 | 23.1 |
| | Provide child safety programs | 92.3 | 69.9 | 22.5 |
| | Provide recreation programs for preschoolers | 87.3 | 65.1 | 22.2 |
| | Maintain local streets and roads | 87.2 | 64.9 | 22.2 |
| | Reduce traffic congestion | 73.0 | 51.7 | 21.3 |
| | Provide adult rec programs | 83.8 | 62.8 | 21.0 |
| | Provide animal control services | 88.5 | 68.3 | 20.1 |
| | Provide street sweeping services | 86.6 | 67.2 | 19.4 |
| | Providing special events like concerts in the park | 86.7 | 67.5 | 19.2 |
| | Provide bike paths and pedestrian facilities | 90.1 | 71.2 | 18.8 |
| | Issue building permits | 84.6 | 65.8 | 18.8 |
| | Prevent storm-water pollution | 89.3 | 70.7 | 18.6 |
| | Provide rec, sports for teens | 85.0 | 70.0 | 15.0 |
| | Provide garbage collection services | 94.6 | 83.8 | 10.8 |
| Provide adult sports programs | 79.3 | 69.0 | 10.3 | |
| Provide recycling services | 84.4 | 75.1 | 9.3 | |
| Provide crossing guards near schools | 96.9 | 90.3 | 6.6 | |

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 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 29 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 (92% extremely or very important), followed by investigating criminal activity (78%), and promoting economic development (72%). At the other end of the spectrum, respondents generally viewed the City providing employee hiring or training services (32%) and business education events (36%) as less important. Table 16 on the next page presents the change in importance assigned to each item tested in 2018 and 2021. During this period, there were statistically significant decreases in the perceived importance of three general services: providing building inspection services (-15%), providing building permit services (-12%), and revitalizing outdated areas in the City (-10%).

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 29 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY



TABLE 16 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY BY STUDY YEAR

| | Study Year | | Change in Extremely + Very Important |
|--|------------|------|--------------------------------------|
| | 2021 | 2018 | |
| Providing free business consulting services | 44.5 | 43.0 | +1.5 |
| Providing hiring or employee training services | 31.7 | 31.9 | -0.2 |
| Providing business networking events | 46.4 | 47.0 | -0.6 |
| Maintaining a low crime rate | 92.1 | 92.9 | -0.7 |
| Promoting economic development | 71.6 | 75.9 | -4.4 |
| Providing business watch programs | 45.0 | 49.8 | -4.8 |
| Enforcing traffic laws | 59.2 | 65.1 | -5.8 |
| Investigating criminal activity | 78.4 | 85.2 | -6.8 |
| Providing business education events | 35.8 | 45.4 | -9.6 |
| Revitalizing outdated areas in the City | 61.7 | 71.8 | -10.2† |
| Providing building permit services | 48.6 | 60.7 | -12.1† |
| Providing building inspection services | 40.8 | 55.6 | -14.8† |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

When asked about satisfaction with the same list of services, the business community was largely satisfied with every service tested (see Figure 30). At the top of the list was providing building permit services (96% very or somewhat satisfied), followed by providing business education events (93%), enforcing traffic laws (92%), and maintaining a low crime rate (92%). There were no statistically significant changes between 2018 and 2021 (see Table 17 on 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 30 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY

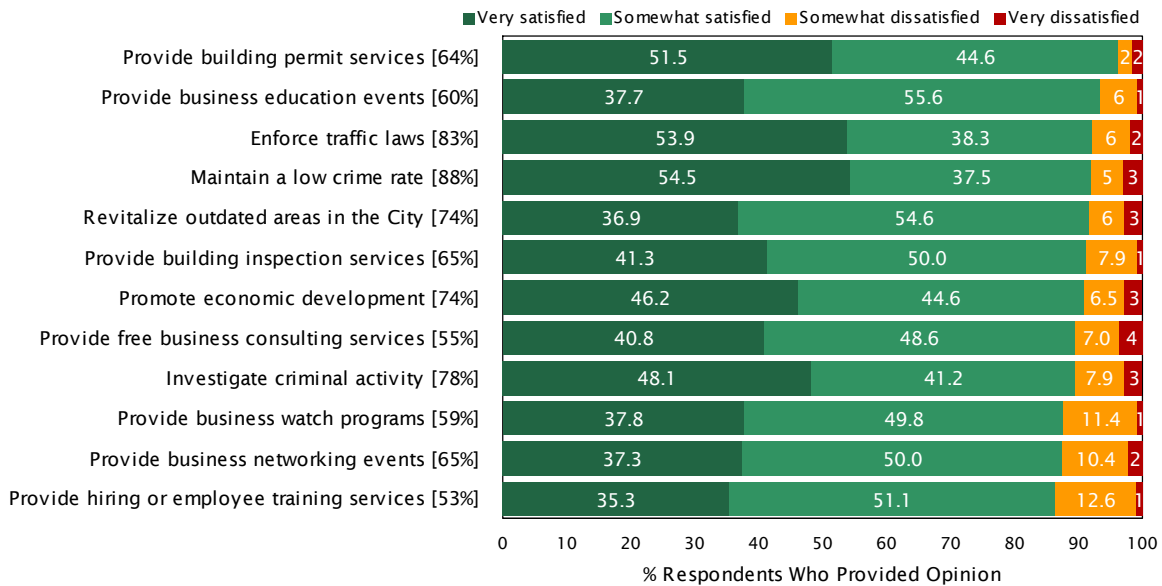


TABLE 17 SATISFACTION WITH SELECT SERVICES I: BUSINESS SERVICES BY STUDY YEAR

| | Study Year | | Change in Satisfaction |
|--|------------|------|------------------------|
| | 2021 | 2018 | |
| Revitalize outdated areas in the City | 91.5 | 84.8 | +6.8 |
| Promote economic development | 90.8 | 89.5 | +1.3 |
| Provide building permit services | 96.2 | 95.1 | +1.1 |
| Maintain a low crime rate | 92.0 | 91.1 | +0.9 |
| Enforce traffic laws | 92.2 | 92.2 | -0.0 |
| Provide business education events | 93.3 | 93.8 | -0.5 |
| Provide business networking events | 87.3 | 87.8 | -0.5 |
| Provide free business consulting services | 89.5 | 90.4 | -0.9 |
| Investigate criminal activity | 89.3 | 93.1 | -3.8 |
| Provide hiring or employee training services | 86.4 | 90.9 | -4.5 |
| Provide building inspection services | 91.3 | 96.4 | -5.1 |
| Provide business watch programs | 87.7 | 94.5 | -6.9 |

The second list of services presented to business managers, shown in Figure 31, 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% extremely or very important), followed by reducing traffic congestion (68%), landscaping median strips and other areas of the City (66%) and street sweeping (64%). As shown in Table 18 on the next page, there was one statistically significant change in the perceived importance of the six services between 2018 and 2021: landscaping median strips and other areas of the City (+10%).

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 31 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY

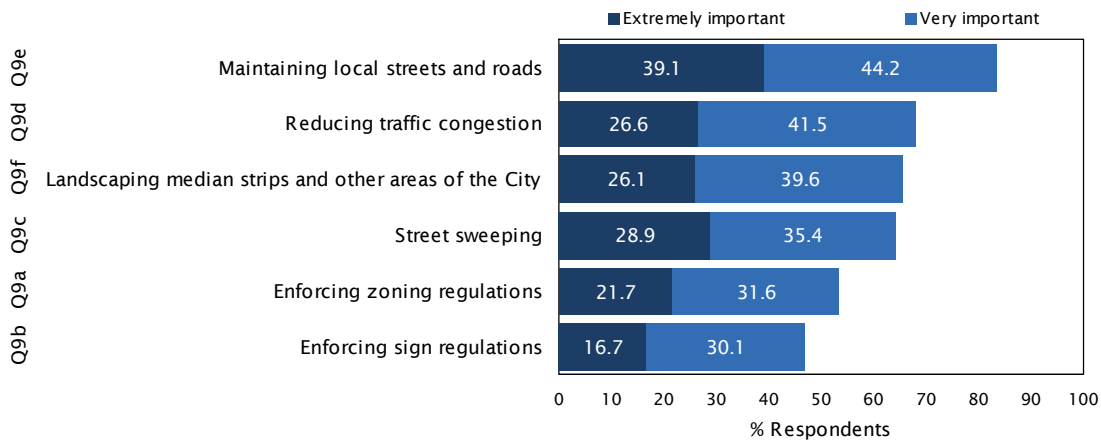


TABLE 18 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY BY STUDY YEAR

| | Study Year | | Change in Extremely + Very Important |
|---|------------|------|--------------------------------------|
| | 2021 | 2018 | |
| Landscaping median strips and other areas of the City | 65.7 | 56.1 | +9.6† |
| Street sweeping | 64.2 | 59.8 | +4.4 |
| Maintaining local streets and roads | 83.3 | 83.7 | -0.4 |
| Enforcing zoning regulations | 53.4 | 56.5 | -3.1 |
| Enforcing sign regulations | 46.8 | 51.8 | -5.1 |
| Reducing traffic congestion | 68.1 | 74.3 | -6.2 |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

Figure 32 presents the overall levels of satisfaction for the same list of infrastructure services tested in the previous question. Satisfaction was high for all services tested, but greatest with respect to the City’s efforts to landscape median strips and other areas of the City (96%), maintain local streets and roads (96%), provide street sweeping services (93%), enforce zoning regulations (93%), and enforce sign regulations (93%). Although still very positive, the business community was slightly less satisfied with efforts to reduce traffic congestion (84%). As shown in Table 19, there were no statistically significant changes in satisfaction with the City’s efforts to provide these services between 2018 and 2021.

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 32 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY

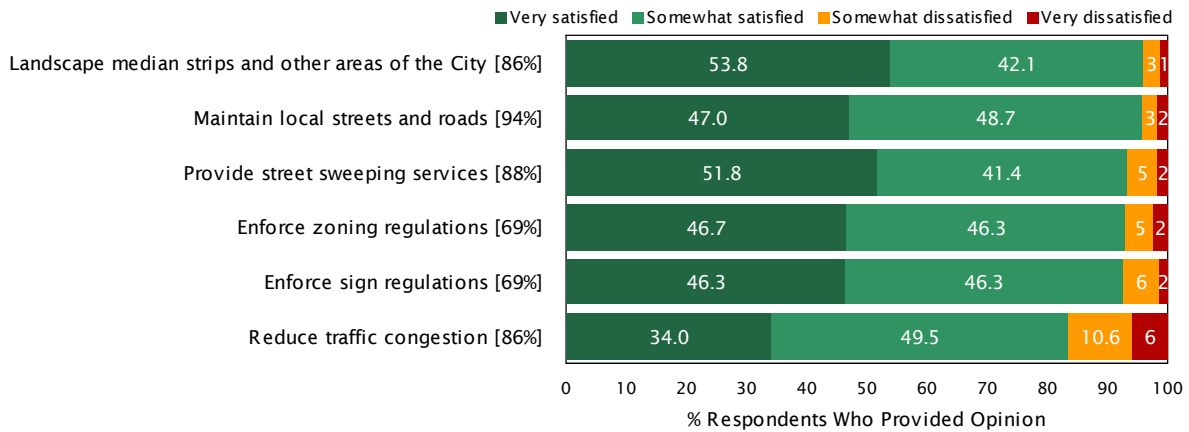


TABLE 19 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY BY STUDY YEAR

| | Study Year | | Change in Satisfaction |
|---|------------|------|------------------------|
| | 2021 | 2018 | |
| Enforce zoning regulations | 93.0 | 89.1 | +3.9 |
| Reduce traffic congestion | 83.5 | 80.7 | +2.8 |
| Enforce sign regulations | 92.6 | 90.9 | +1.7 |
| Maintain local streets and roads | 95.7 | 95.7 | +0.0 |
| Landscape median strips and other areas of the City | 95.9 | 96.4 | -0.4 |
| Provide street sweeping services | 93.1 | 94.6 | -1.5 |



PERFORMANCE NEEDS & PRIORITIES

With a measure of the importance of a service to respondents as well as a measure of 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 *averages* to conduct this analysis, True North has developed 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.¹ Table 20 on the next page presents a grid based on the importance and satisfaction scales. The horizontal axis corresponds to the four *importance* options, and the vertical scale corresponds to the four *satisfaction* options. The 16 cells within the grid are grouped into one of following six categories based on how well the City is meeting, or not meeting, needs for a particular service.

| | |
|--------------------------------------|---|
| <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 too 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 too important, or b) a respondent is somewhat dissatisfied and the service is viewed as very important. |
| <i>Not Meeting Needs, Severely</i> | The City is severely <i>not</i> 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. |

1. 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.

TABLE 20 NEEDS & PRIORITY MATRIX

| | | Importance | | | |
|--------------|-----------------------|-------------------------------|-------------------------------|-------------------------------|-----------------------------|
| | | Not too 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., enforcing zoning regulations—if they were somewhat dissatisfied with the City’s efforts to provide the service, but the service was viewed as only somewhat important.

Figure 33 on the following page presents each of the 33 services tested among residents, along with the percentage of respondents who were grouped into each of the six possible categories. Figure 34 provides the same information for the 18 services tested among the business community. For ease of interpretation, the color-coding in both figures is consistent with that presented in Table 20 above. Thus, for example, in the service area of reducing traffic congestion on city streets, the City is exceeding the needs of 5% of residents, moderately meeting the needs of 27% of residents, marginally meeting the needs of 39% 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 22% of residents.

For the majority of services tested, the City is meeting the needs of at least 84% of residents and 91% of businesses. 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 33 and 34. Reducing traffic congestion is the top priority for improvement among residents, followed by providing recreation programs for special needs children, providing neighborhood watch programs, providing adult sports programs, and investigating criminal activity. Among businesses, reducing traffic congestion, providing hiring or employee training services, and providing business networking events topped the list.

FIGURE 33 SERVICE NEEDS: RESIDENT SURVEY

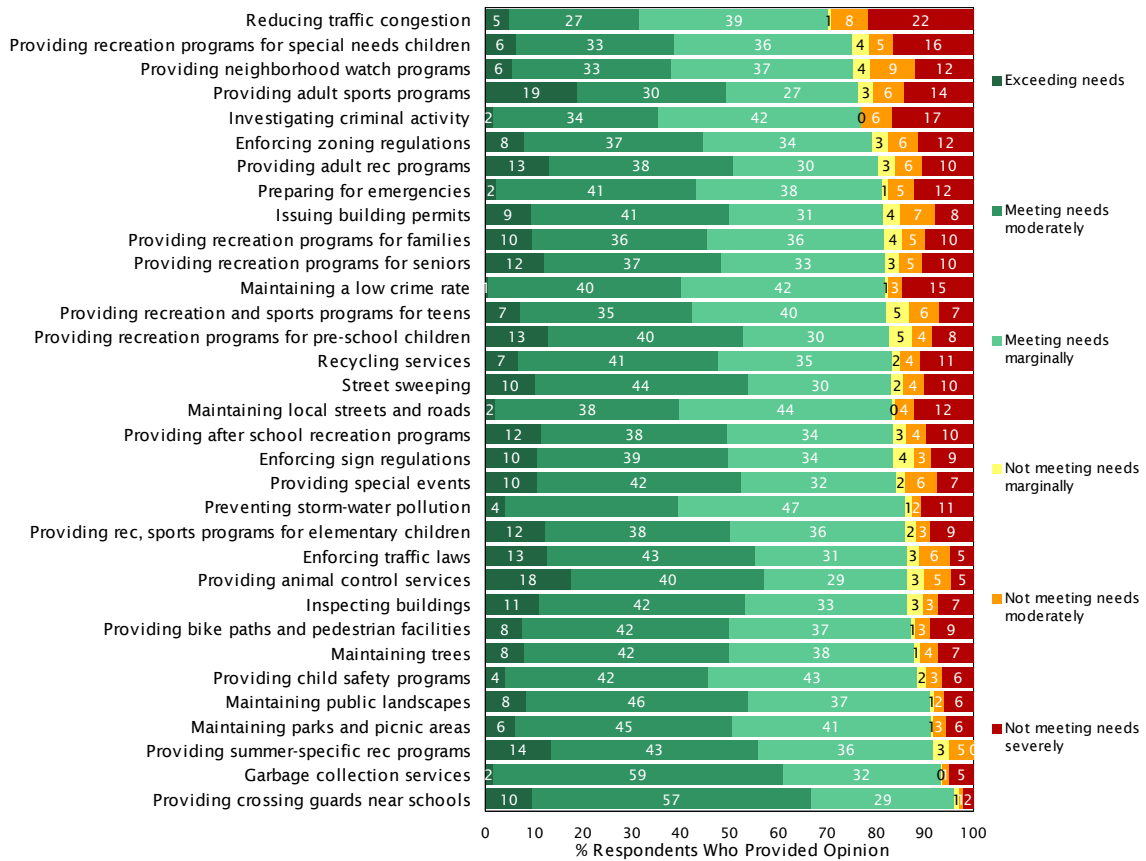
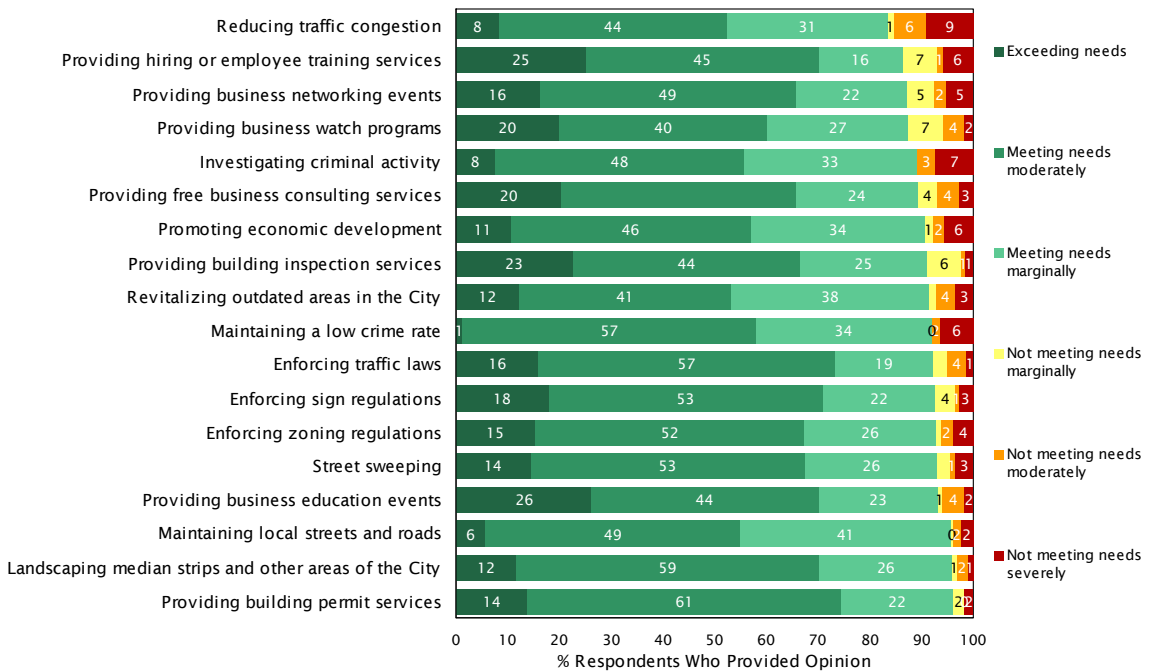


FIGURE 34 SERVICE NEEDS: BUSINESS SURVEY



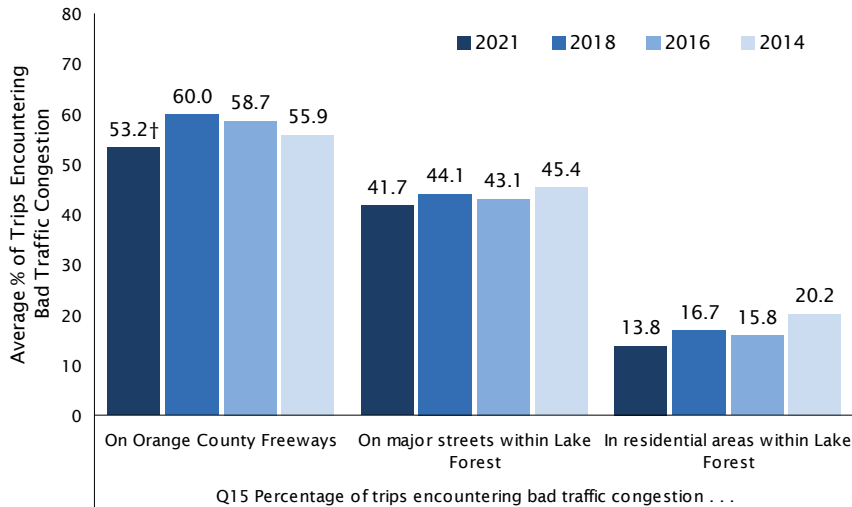
T R A F F I C

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 in the previous section of this report (see *Performance Needs & Priorities* on page 40), reducing traffic congestion emerged as the top performance need among *both* residents and businesses based on the relative importance and satisfaction scores of services across departments in the City.

TRAFFIC IN AND AROUND LAKE FOREST To drill deeper on this issue, the survey 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 Lake Forest, 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 (53%) of their trips, although this percentage has declined significantly since 2018. Trips on major streets in the City were somewhat better, with an average of 42% involving bad congestion, compared with approximately 14% 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.*

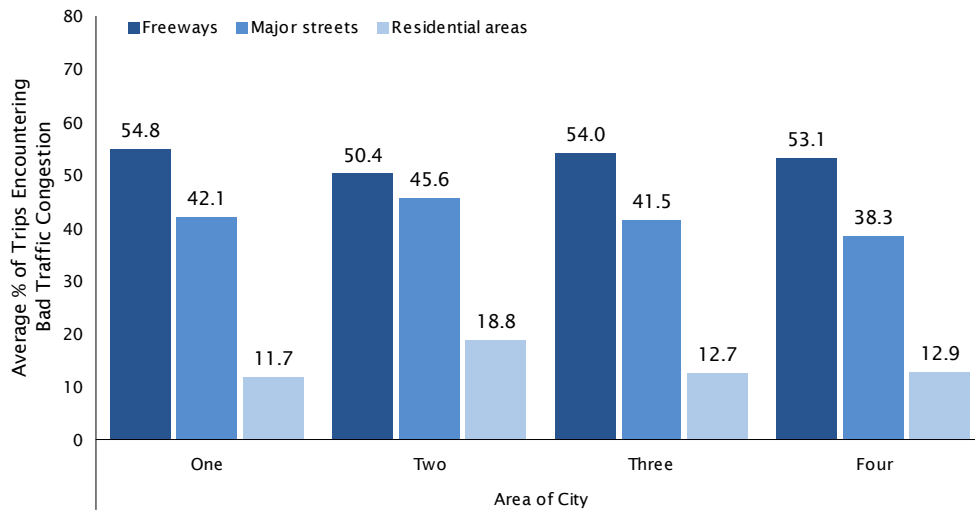
FIGURE 35 AVERAGE FREQUENCY OF ENCOUNTERING BAD TRAFFIC CONGESTION: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

Figure 36 on the next page presents the results of this question by the area of the City in which residents reside, showing the average percentage of trips that involve bad traffic congestion. The reported average percentage of trips with bad congestion on Orange County freeways was fairly consistent regardless of the area in which respondents resided, while those living in Area 2 were somewhat more likely than their counterparts to report encountering bad congestion on major streets and in residential areas.

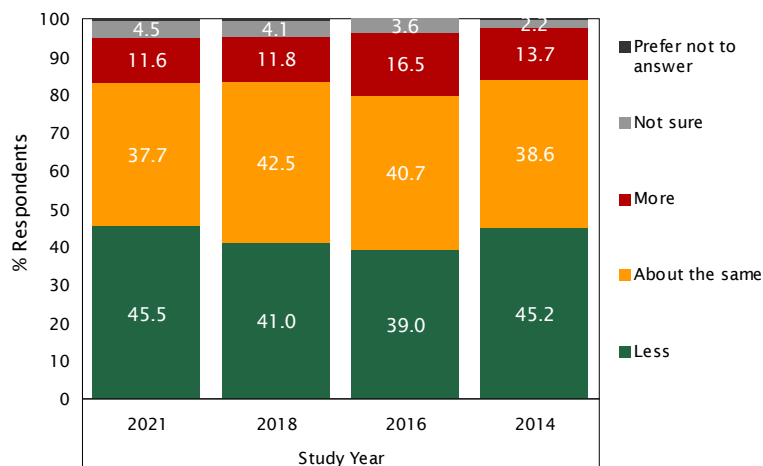
FIGURE 36 AVERAGE FREQUENCY OF ENCOUNTERING BAD TRAFFIC CONGESTION: RESIDENT SURVEY BY AREA OF CITY



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 (83%) felt that Lake Forest has either less (46%) or about the same amount (38%) of traffic congestion as neighboring Orange County cities. A minority (12%) of residents surveyed felt that Lake Forest has more congestion than other Orange County cities, whereas 6% were unsure or unwilling to answer the question. There were no statistically significant changes in responses to this question between 2018 and 2021.

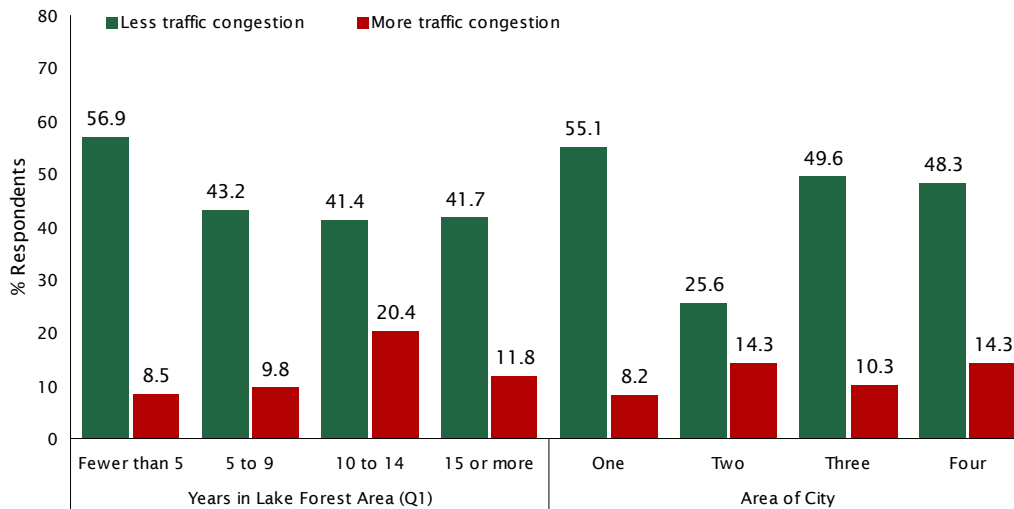
Question 16: Resident Survey *When compared to traffic congestion in other Orange County cities, would you say that the amount of traffic congestion within Lake Forest is less, about the same, or more?*

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



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 less than five years and those living in Area 1 were the most 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 the City's efforts to improve traffic circulation.

Figure 39 on the next page shows that seven-in-ten residents indicated they were very (21%) or somewhat (49%) satisfied with the City's efforts to improve circulation, whereas approximately one quarter were very (6%) or somewhat (17%) dissatisfied. When compared with the 2018 survey results for the same question, the percentage of residents very dissatisfied with the City's efforts to improve circulation decreased significantly.

Figure 40 on the next page 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. As one might expect, satisfaction with efforts to improve traffic circulation was strongly correlated with respondents' perceptions of how Lake Forest's traffic congestion 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

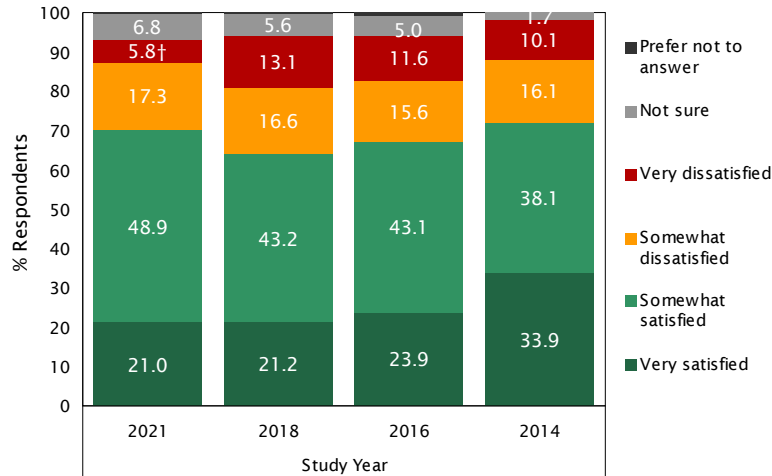
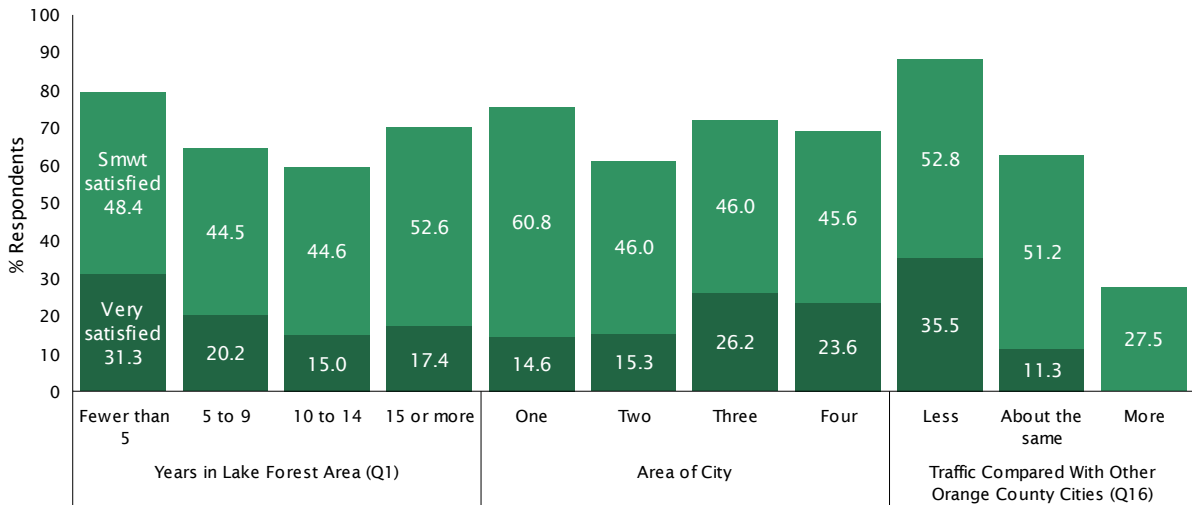


FIGURE 40 SATISFACTION WITH CITY EFFORTS TO IMPROVE TRAFFIC CONGESTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & TRAFFIC COMPARED WITH OTHER ORANGE COUNTY CITIES

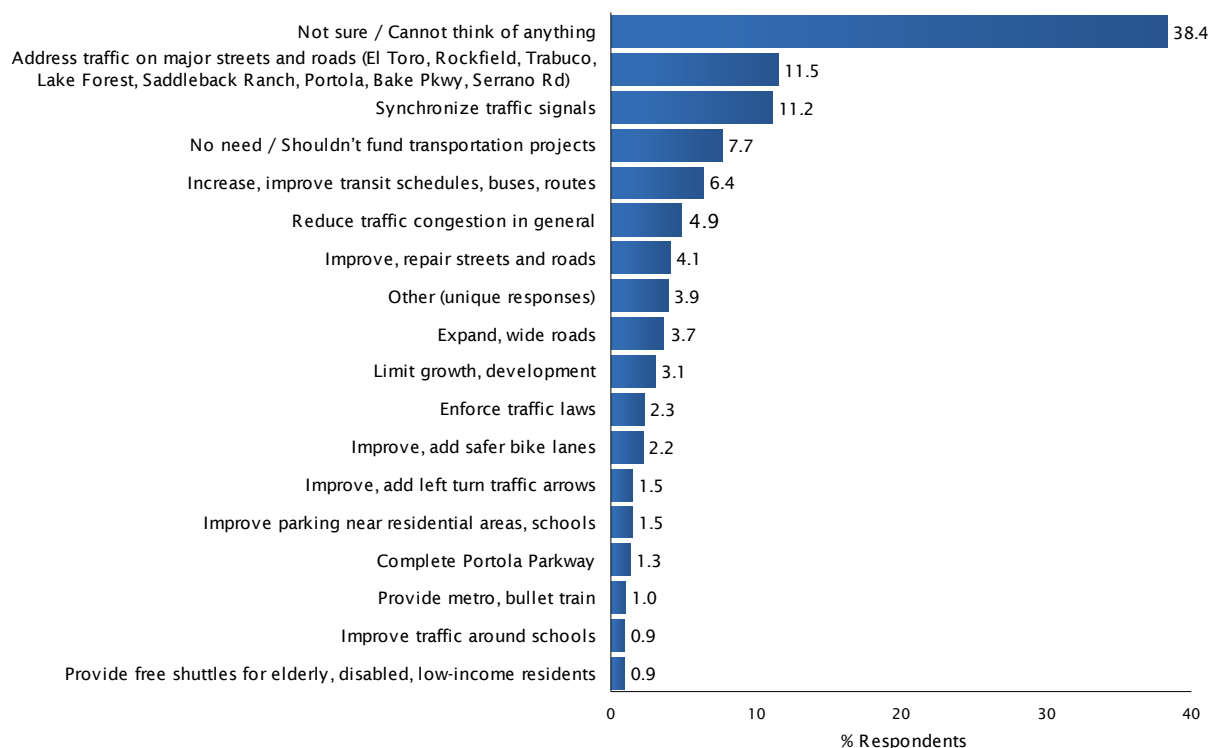


MOST DESIRED TRAFFIC OR TRANSPORTATION PROJECT The final question in this series asked residents if the City could fund only one traffic or transportation-related project, what should it be? Question 18 was asked in an open-ended manner, allowing respondents to mention any project that came to mind without being prompted by—or restricted to—a particular list of options. The responses were later grouped into the categories presented in Figure 41 on the next page.

More than one-third (38%) of respondents were unsure or could not think of a traffic or transportation-related project to fund. Addressing traffic on a specific major street in the City including mentions of El Toro, Rockfield, Trabuco, and others was the most common type of suggestion (12%), followed closely by synchronizing traffic signals (11%). Other suggestions included increasing/improving transit schedules/routes (6%), reducing congestion in general (5%), and improving/repairing streets and roads (4%). An additional 8% 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



NEIGHBORHOOD ISSUES & CCA

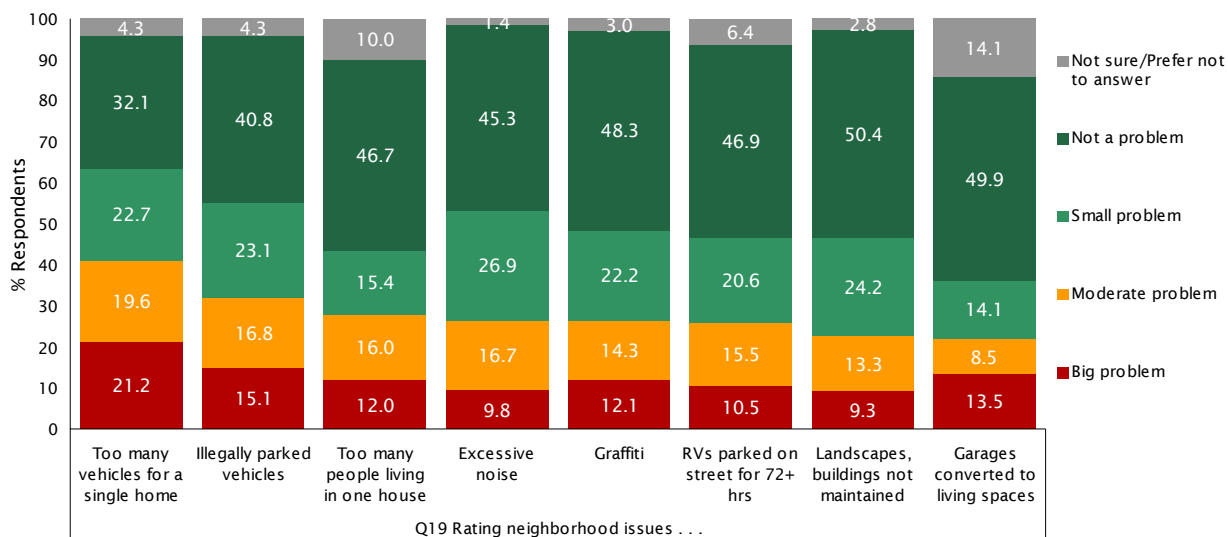
To allow the City to track its performance over time, most of the questions included in the 2021 survey were continued from prior surveys. To keep the survey dynamic, however, each cycle the surveys are also modified to include questions on salient topics and/or to help inform particular policy or planning issues of interest at the time. For the 2021 survey of residents, these new questions addressed neighborhood issues and Community Choice Aggregation (CCA).

NEIGHBORHOOD ISSUES Research has shown that fear of crime and perceptions of safety can be influenced by factors that—although they are not directly related to crime—when present in a community are suggestive of an unsafe environment. Graffiti, unkempt yards and excessive noise, for example, are problems that can lead a resident to feel that their neighborhood is not safe. These and other issues—such as recreational vehicles being parked on streets and illegal parking—can also negatively impact property values and the perceived quality of life in an area.

The 2021 survey presented residents with each of the issues shown on along the bottom of Figure 42 and asked—for each—whether the issue is a big problem, moderate problem, small problem, or not a problem in their neighborhood. Among residents overall, too many vehicles associated with a single home (41% big or moderate problem) was the most commonly perceived neighborhood problem, followed by illegally parked vehicles (32%) and too many people living in a single house (27%). Excessive noise (27%) and graffiti (19%) rounded-out the top five most prevalent problems.

Question 19: Resident Survey *As I read the following issues, please indicate whether each issue is a big problem, a moderate problem, a small problem, or not a problem in your neighborhood.*

FIGURE 42 RATING NEIGHBORHOOD ISSUES: RESIDENT SURVEY



When compared with the 2008 survey findings (the last time this question series was asked), there were statistically significant increases in the percentage of residents who mentioned recreational vehicles being parked on the street for more than 72 hours (+8%) and graffiti (+7%) as a big or moderate problem (see Table 21 on the next page).

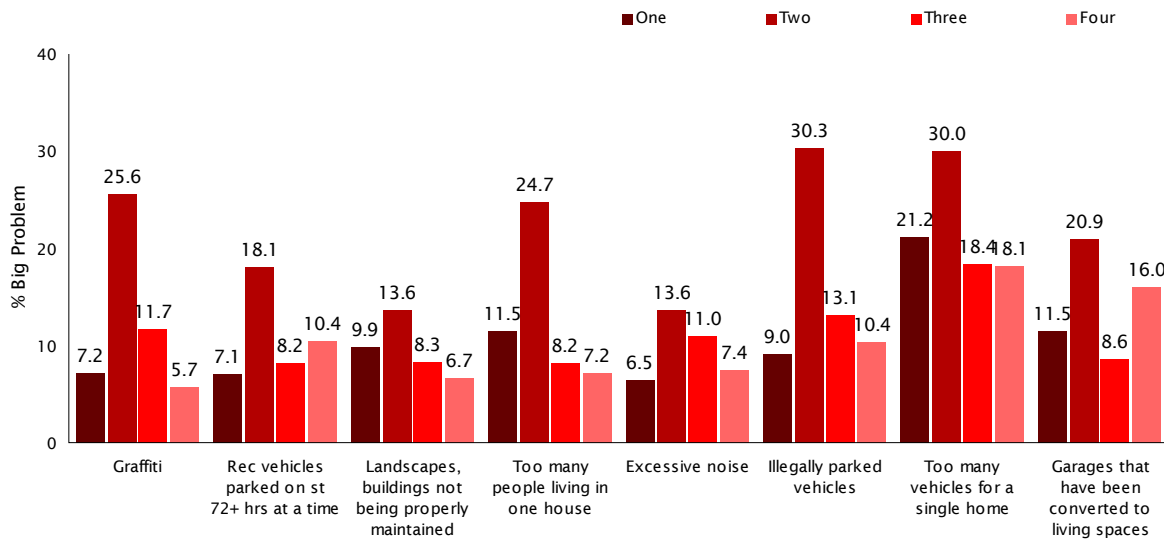
TABLE 21 RATING NEIGHBORHOOD ISSUES BY STUDY YEAR (SHOWING % BIG OR MODERATE PROBLEM): RESIDENT SURVEY

| | Study Year | | | Change in Big + Moderate 2008 to 2021 |
|---|------------|------|------|---------------------------------------|
| | 2021 | 2008 | 2006 | |
| Recreational vehicles parked on the street for more than 72 hours at a time | 26.0 | 17.9 | 25.5 | +8.2† |
| Graffiti | 26.4 | 19.3 | 14.3 | +7.2† |
| Excessive noise | 26.5 | 21.3 | 25.1 | +5.2 |
| Landscapes and buildings not being properly maintained | 22.6 | 18.1 | 15.2 | +4.5 |
| Garages that have been converted to living spaces | 21.9 | 18.4 | 15.5 | +3.5 |
| Illegally parked vehicles | 31.9 | 28.9 | N/A | +3.0 |
| Too many people living in one house | 27.9 | 28.6 | N/A | -0.7 |
| Too many vehicles for a single home | 40.9 | 42.2 | N/A | -1.3 |

† Statistically significant difference (p < 0.05) between the 2008 and 2021 studies.

Figure 43 demonstrates that although each of the issues tested in Question 19 were rated as a big problem by some residents in every area of the City, those living in Area 2 were more likely than their respective counterparts to perceive these issues as big problems in their neighborhood. This was especially true for graffiti, too many people living in one house, and parking issues including illegally parked vehicles, too many vehicles for a single home, and recreation vehicles parked on the streets for more than 72 hours.

FIGURE 43 RATING NEIGHBORHOOD ISSUES: RESIDENT SURVEY BY AREA OF CITY (SHOWING % BIG PROBLEM)

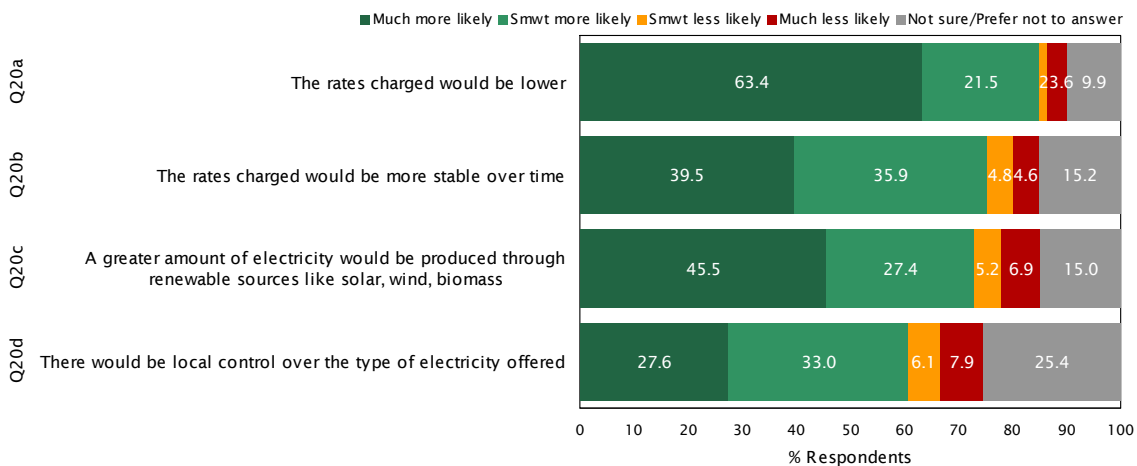


COMMUNITY CHOICE AGGREGATION Community choice aggregation (CCA), also known as municipal aggregation, are programs that allow local governments to procure power on behalf of their residents, businesses, and municipal accounts from an alternative supplier while still receiving transmission and distribution service from their existing utility. Although the results can vary, CCA programs can lead to lower and more stable electricity rates over time, provide the option to procure a greater amount of energy from renewable sources such as solar, wind and biomass, and allow local jurisdictions more control over their energy supplies. To help inform the City of Lake Forest’s involvement in the Orange County Power Authority’s CCA program, the 2021 survey asked residents and business managers about their interest in receiving electricity from the City (rather than from Southern California Edison) under certain conditions.

As shown in Figure 44, 85% of residents indicated they would be more likely to purchase their electricity from the City of Lake Forest if the rates charged would be lower (63% much more likely + 22% somewhat more likely). Approximately three-quarters of respondents also indicated they would be more likely to purchase their electricity from the City if the rates were more stable over time (75%) and a greater amount of the electricity would be produced by renewable sources like solar, wind, and biomass (73%). Although still attractive, fewer residents indicated they would be more likely to purchase electricity from the City if there would be more local control over the type of electricity produced (61%).

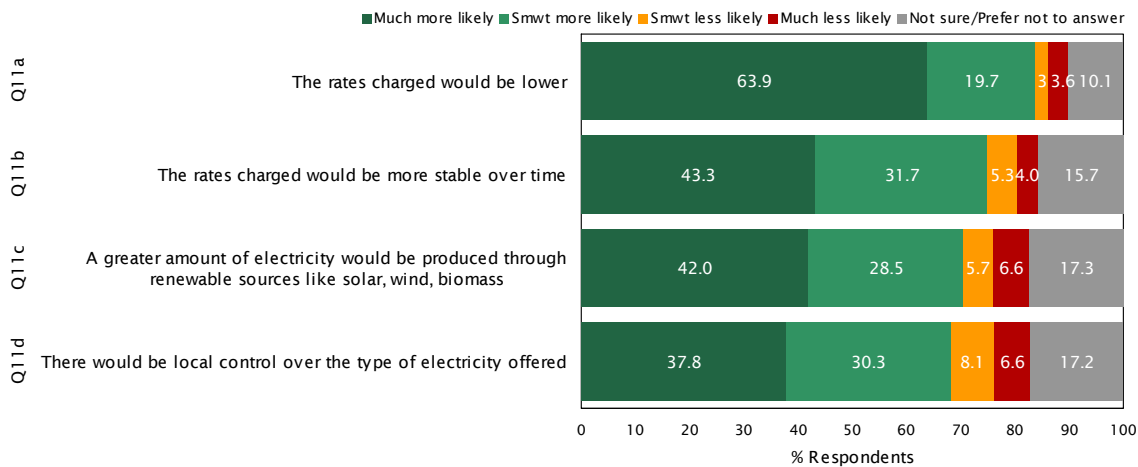
Question 20/11: Resident/Business Survey *The City of Lake Forest is considering offering electricity services directly to residents and businesses in the near future. Under this potential new program, residents/businesses will have the option to purchase electricity from the City or continue to purchase electricity from Southern California Edison. As I read several features of the City's electricity program, I'd like to know how they may impact your likelihood of purchasing your electricity from the City.*

FIGURE 44 LIKELIHOOD OF PURCHASING ELECTRICITY FROM CITY: RESIDENT SURVEY



Turning to the business community, as shown in Figure 45 on the next page, 84% of business managers indicated they would be more likely to purchase their electricity from the City of Lake Forest if the rates charged would be lower (64% much more likely + 20% somewhat more likely). Roughly seven-in-ten business managers also indicated they would be more likely to purchase electricity from the City if the rates were more stable over time (75%), a greater amount of the electricity would be produced by renewable sources like solar, wind, and biomass (71%), and there would be local control over the type of electricity produced (68%).

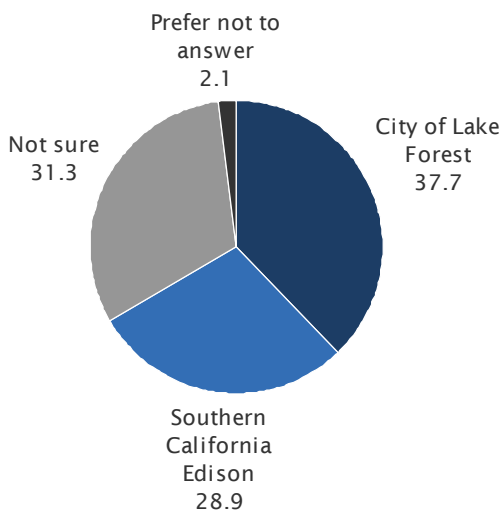
FIGURE 45 LIKELIHOOD OF PURCHASING ELECTRICITY FROM CITY: BUSINESS SURVEY



Naturally, electricity rates are likely to be a driving factor in residents’ and business owners’ choice of electricity providers. Indeed, the most attractive aspect of a CCA for Lake Forest residents and businesses is the promise of lower rates (see figures 44 and 45). Recognizing this, the survey also asked respondents who they would prefer to provide their electricity if the cost of electricity were the *same*: Southern California Edison or the City of Lake Forest? Under this scenario, 29% of residents preferred to stay with Southern California Edison, 38% preferred to receive their power from the City, and one-third were unsure (31%) or unwilling to share their preference (2%) (see Figure 46). Among business respondents, 36% preferred to stay with Southern California Edison, 36% preferred to receive their power from the City, and 29% were unsure or unwilling to share their preference (see Figure 49 on page 53).

Question 21: Resident Survey *If the cost of electricity were the same, who would you prefer to be your electricity provider: _____ OR _____?*

FIGURE 46 PREFERRED ELECTRICITY PROVIDER IF RATES ARE SAME: RESIDENT SURVEY



For the interested reader, figures 47 and 48 show how the percentages of residents who preferred Southern California Edison or the City of Lake Forest as their energy provider (among those with an opinion) varied by demographic characteristics and satisfaction with the City’s performance in providing municipal services. A strong preference for receiving their electricity from the City of Lake Forest was common among those who had lived in the City at least five years, households earning less than \$40,000 or between \$80,000 and \$149,000 annually, renters, residents of Area 1, those between 30 and 64 years of age, and those who were generally satisfied with the City’s overall performance in providing services.

FIGURE 47 PREFERRED ELECTRICITY PROVIDER IF RATES ARE SAME: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, HOUSEHOLD INCOME & HOME OWNER

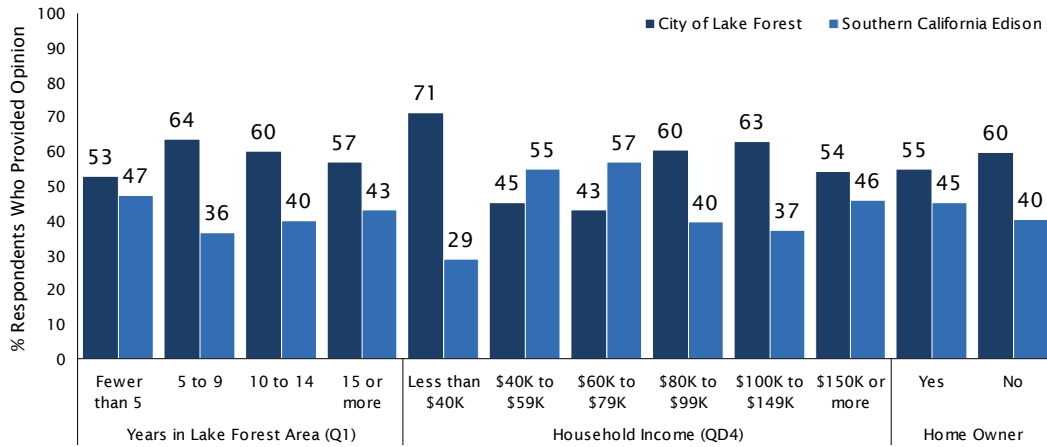
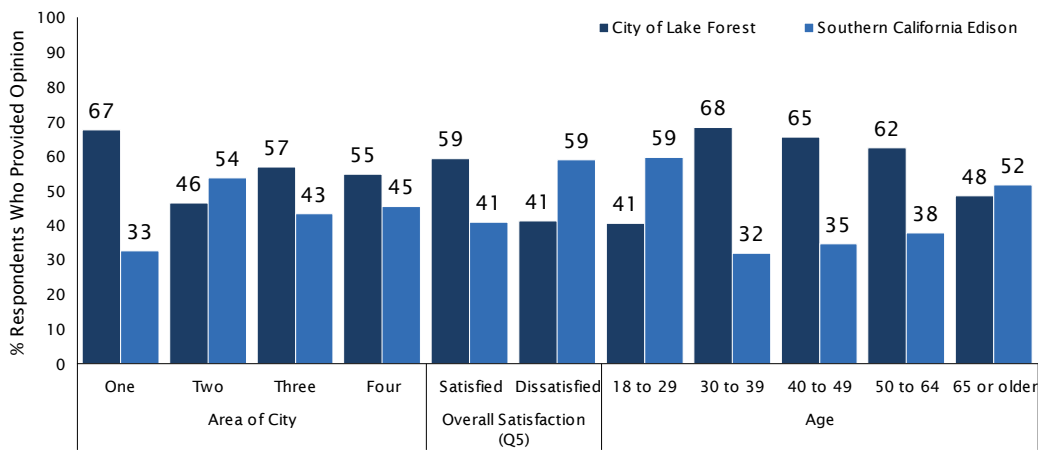
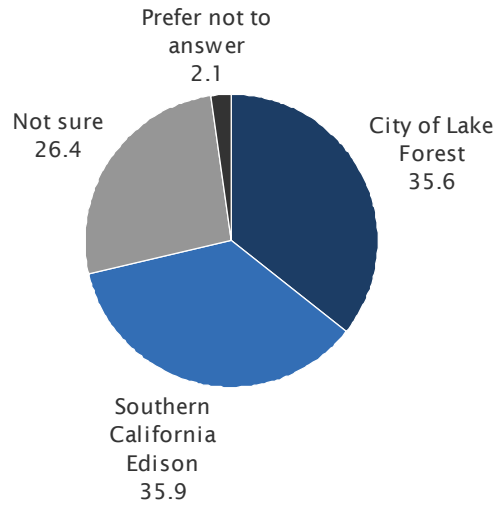


FIGURE 48 PREFERRED ELECTRICITY PROVIDER IF RATES ARE SAME: RESIDENT SURVEY BY AREA OF CITY, OVERALL SATISFACTION & AGE



Question 12: Business Survey *If the cost of electricity were the same, who would you prefer to be your electricity provider: _____ OR _____?*

FIGURE 49 PREFERRED ELECTRICITY PROVIDER IF RATES ARE SAME: BUSINESS SURVEY



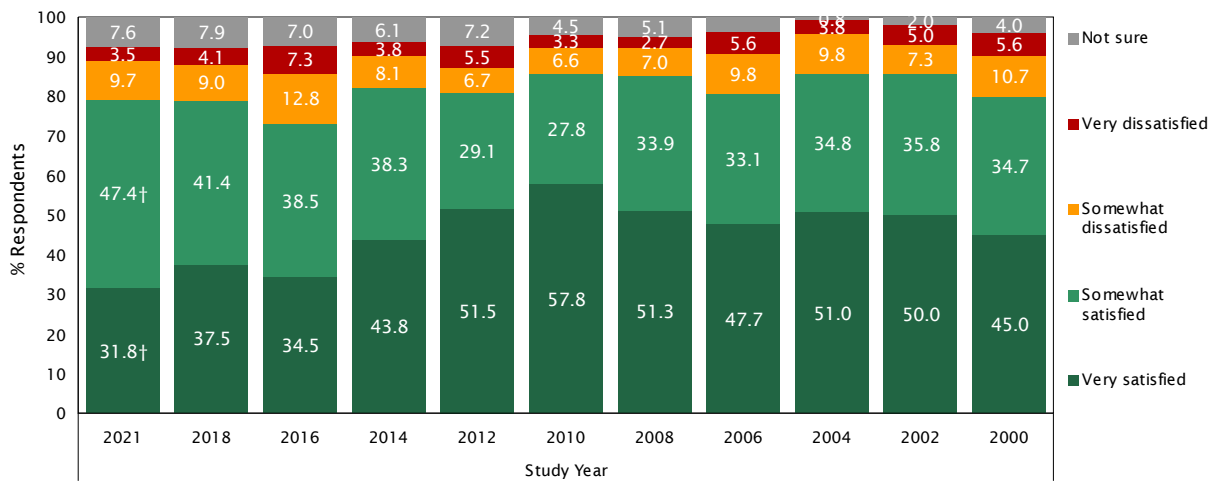
COMMUNICATION

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, its various websites, and social media posts. 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, 79% of residents indicated that they were either very (32%) or somewhat (47%) satisfied with the City’s communication efforts. Although the intensity of satisfaction shifted in a significant way between 2018 and 2021, the overall percentage of those satisfied with the City’s communication efforts remained the same (see Figure 50).

Question 22: 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 50 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

With the exception of one subgroup, at least two-thirds of residents in each demographic segment were satisfied with the City’s communication efforts (see figures 51 and 52 on the next page). As might be expected, residents dissatisfied with the City’s overall performance also tended to be less satisfied with the City’s communication efforts when compared with those generally satisfied with the City (85% vs. 49%).

FIGURE 51 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & HOUSEHOLD INCOME

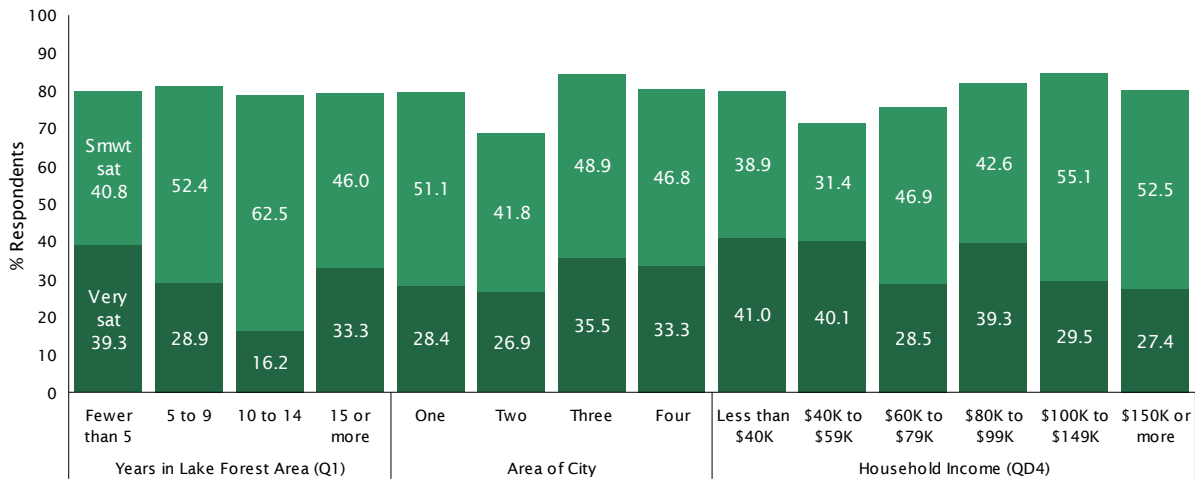
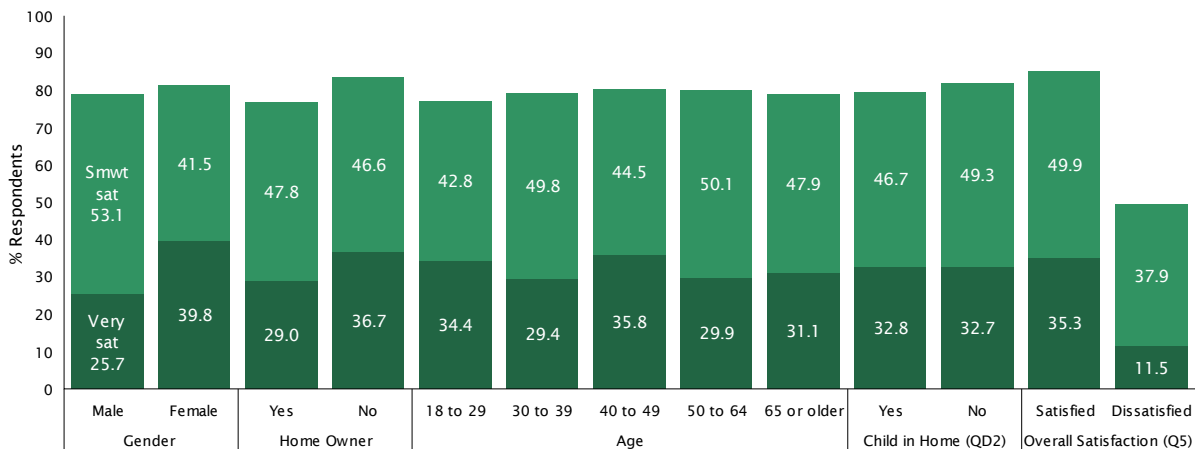


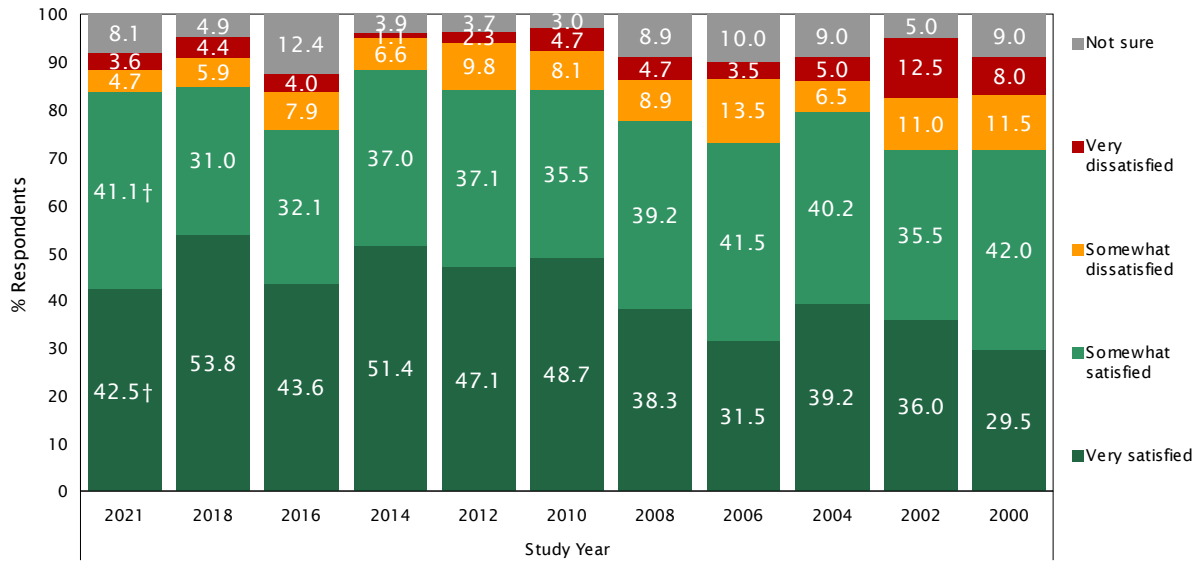
FIGURE 52 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY GENDER, HOME OWNER, AGE, CHILD IN HOME & OVERALL SATISFACTION



Among local businesses, 84% of business managers surveyed in 2021 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, 8% said they were dissatisfied, and 8% were unsure (see Figure 53 on the next page). Similar to the findings of the resident survey, although the intensity of satisfaction shifted significantly between 2018 and 2021, the overall percentage of business managers satisfied with the City's communication efforts remained the same. For the interested reader, figures 54 and 55 show how satisfaction varied across several business sub-groups.

Question 13: 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 53 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

FIGURE 54 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, BUSINESS SIZE IN NEXT 12 MONTHS & LAKE FOREST RESIDENT

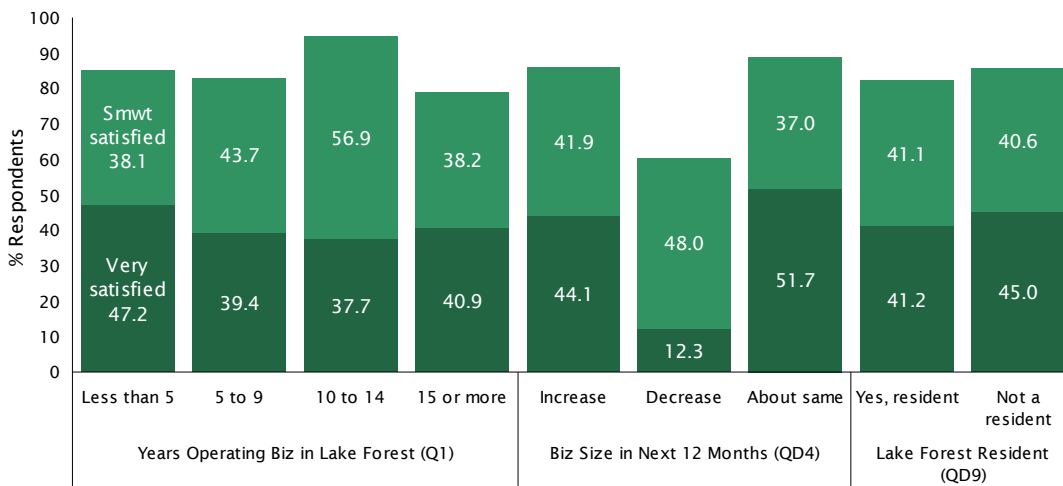
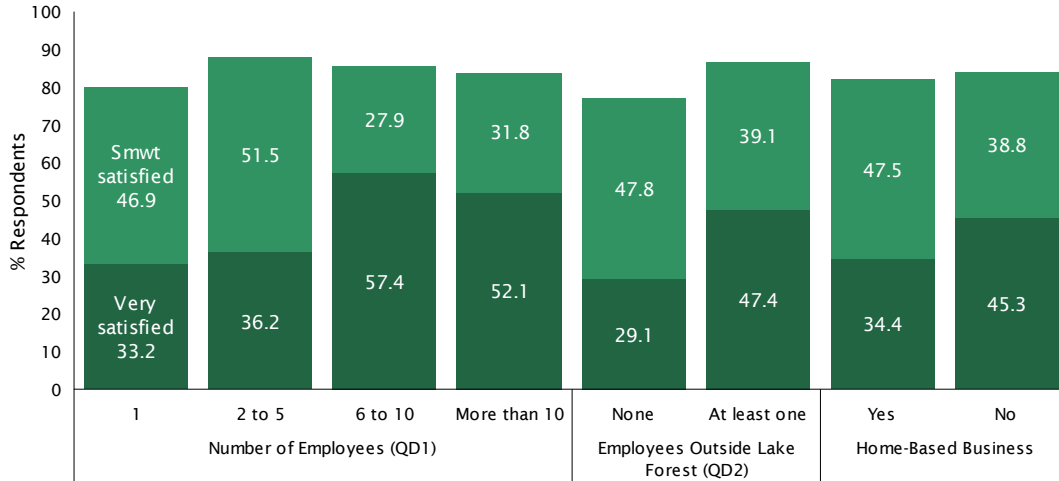


FIGURE 55 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST & HOME-BASED BUSINESS



Among business managers who were dissatisfied with the City’s communication efforts, Question 14 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 do not recall receiving information from the City as the reason for their dissatisfaction.

Question 14: Business Survey *Is there a particular reason why you are dissatisfied with the City's efforts to communicate with local businesses? Please be specific.*

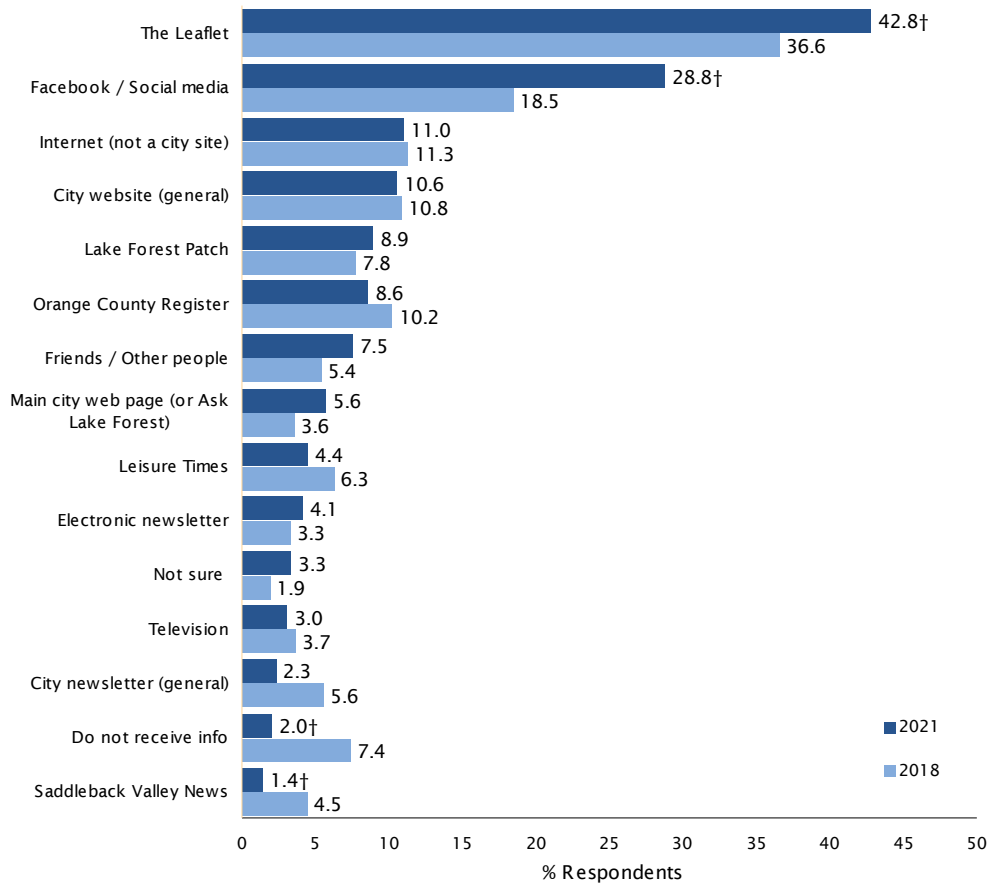
- What communication is there?
- The information isn’t the easiest to find.
- They could increase or offer other means.
- Haven't see any positive communication to help local businesses. There were posts about grants. But, there's so many stipulations to be approved, I can't get financial assistance. Neither can other small local businesses.
- I just haven't received any correspondence.
- Communication and attitude is very poor.
- Never hear any efforts to communicate!
- Don't feel there is a lot of communication.
- I'm not sure where to look.
- Because you are parroting COVID propaganda and your liberal agenda.
- I haven't heard anything from the city.
- I don't even know that they will communicate with businesses. Actually, this is the first that I am getting a phone call for a survey about businesses in the City.
- We never receive anything.

INFORMATION SOURCES Residents and businesses were next asked to indicate the sources they use to find out about 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 two 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 and will sum to more than 100.

As presented in Figure 56, the single most frequently cited source of city information among residents in 2021 was *The Leaflet* (43%), followed by Facebook/social media (29%), Internet in general (not a city site, 11%), one of the City’s websites (general mention, 11%), and the Lake Forest *Patch* (9%). From 2018 to 2021, there were statistically significant increases in *The Leaflet* (+6%) and Facebook/social media (+10%) as information sources, as well as statistically significant decreases in the percentage of respondents who mentioned Saddleback Valley News (-3%) or who reported not receiving information about City of Lake Forest (-5%).

Question 23: Resident Survey *What information sources do you use to find out about City of Lake Forest news, information, and programming?*

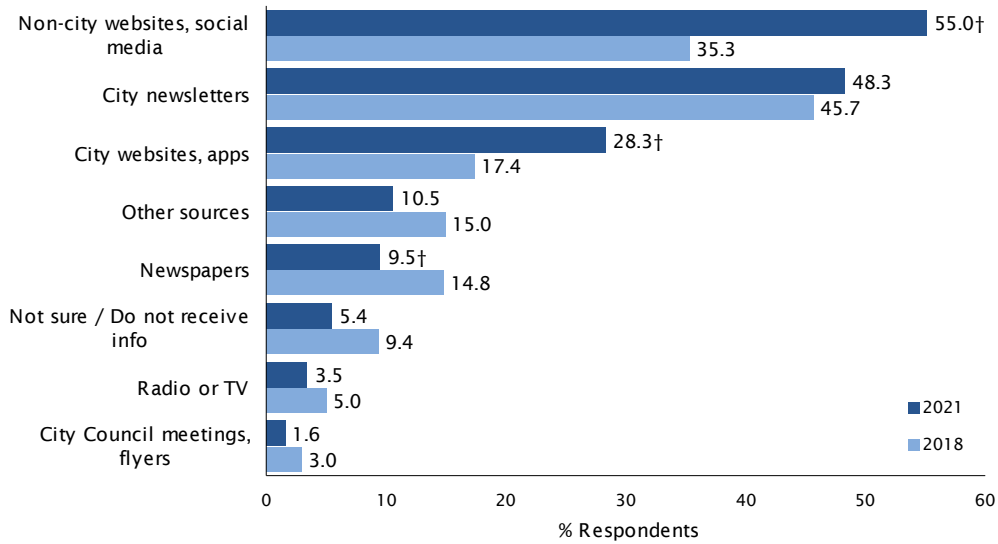
FIGURE 56 SPECIFIC INFORMATION SOURCES: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

To summarize the wide variety of information sources mentioned and more easily compare the results between years and demographic subgroups, Figure 57 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, 55% of residents surveyed in 2021 mentioned a non-city website or social media, 48% mentioned at least one of Lake Forest’s newsletters as a source of city information, and 28% cited one of the City’s websites or apps. Compared with 2018, statistically significant increases in use were apparent for non-city websites or social media (+20%) and City websites and apps (+11%), while newspapers declined significantly (-5%).

FIGURE 57 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

Figures 58 and 59 present the information source categories by age, home ownership 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—residents 50 years and older, home owners, and those currently satisfied with the City’s communication efforts were more likely to rely on city newsletters when compared with their respective counterparts.

FIGURE 58 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY AGE

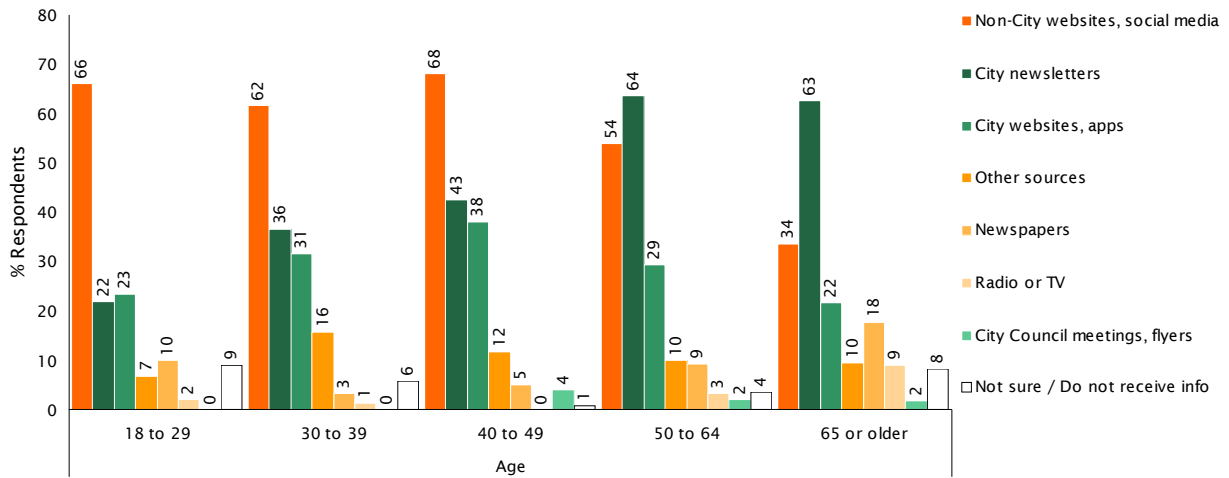
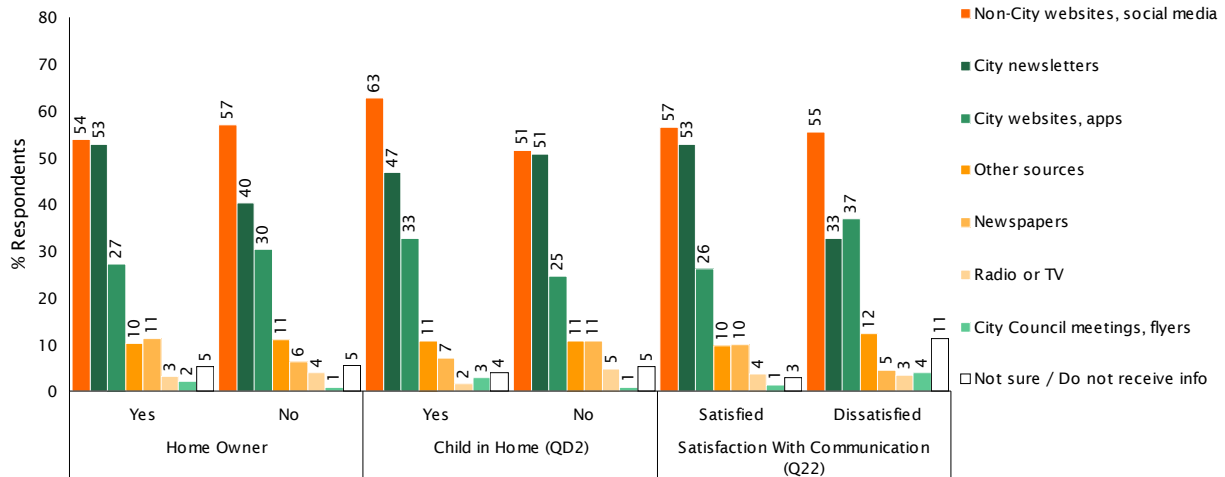


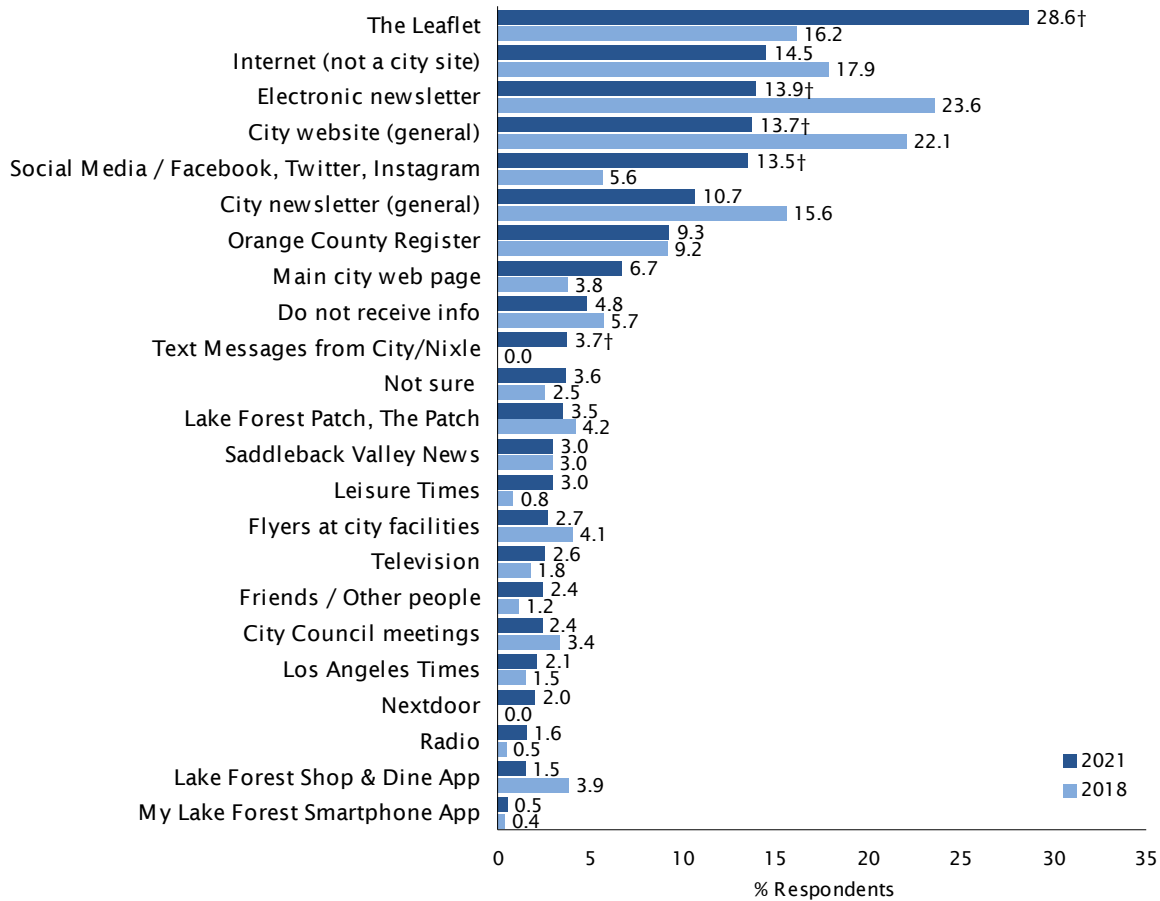
FIGURE 59 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY HOME OWNER, CHILD IN HOME & SATISFACTION WITH COMMUNICATION



As shown in Figure 60 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* (29%), the Internet in general (15%), electronic newsletters (14%), the City’s website in general (14%), social media sites (14%), and city newsletters in general (11%). Statistically significant changes from the 2018 study included mentions of: *The Leaflet* (+12%), general references to an electronic newsletter (-10%) or a City website (-8%), social media sites (+8%), and text messages from the City/Nixle (+4%).

Question 15: Business Survey *What information sources do you use to find out about City of Lake Forest news, information, and programming?*

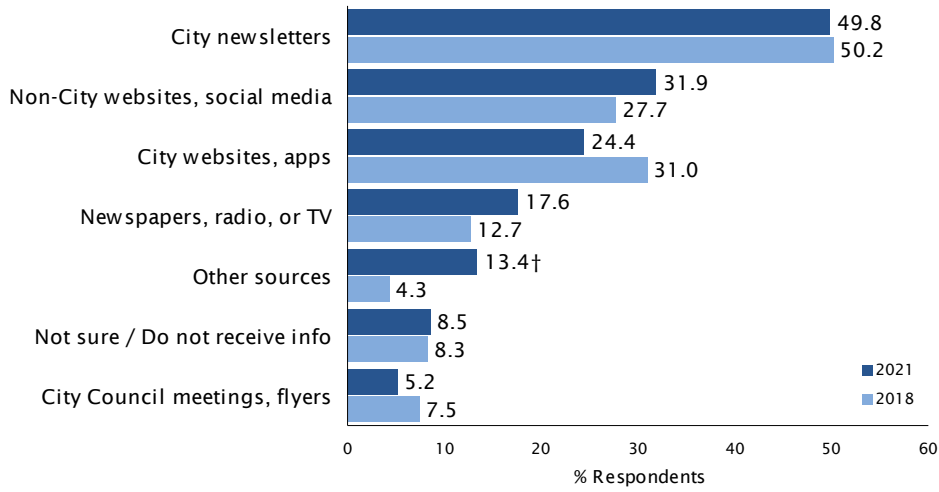
FIGURE 60 INFORMATION SOURCES: BUSINESS SURVEY BY STUDY YEAR



† Statistically significant difference ($p < 0.05$) between the 2018 and 2021 studies.

In the same manner described for the resident survey, Figure 61 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, 50% of businesses surveyed in 2021 mentioned at least one of Lake Forest’s newsletters as a source of information, virtually identical to the finding from 2018. Thirty-two percent (32%) of business managers mentioned non-city website or social media, and 24% cited one of the City’s websites or apps. There was one statistically significant change from the 2018 study: an increase in the percentage of respondents who mentioned *other* sources (+9%).

FIGURE 61 INFORMATION SOURCE CATEGORIES: BUSINESS SURVEY BY STUDY YEAR

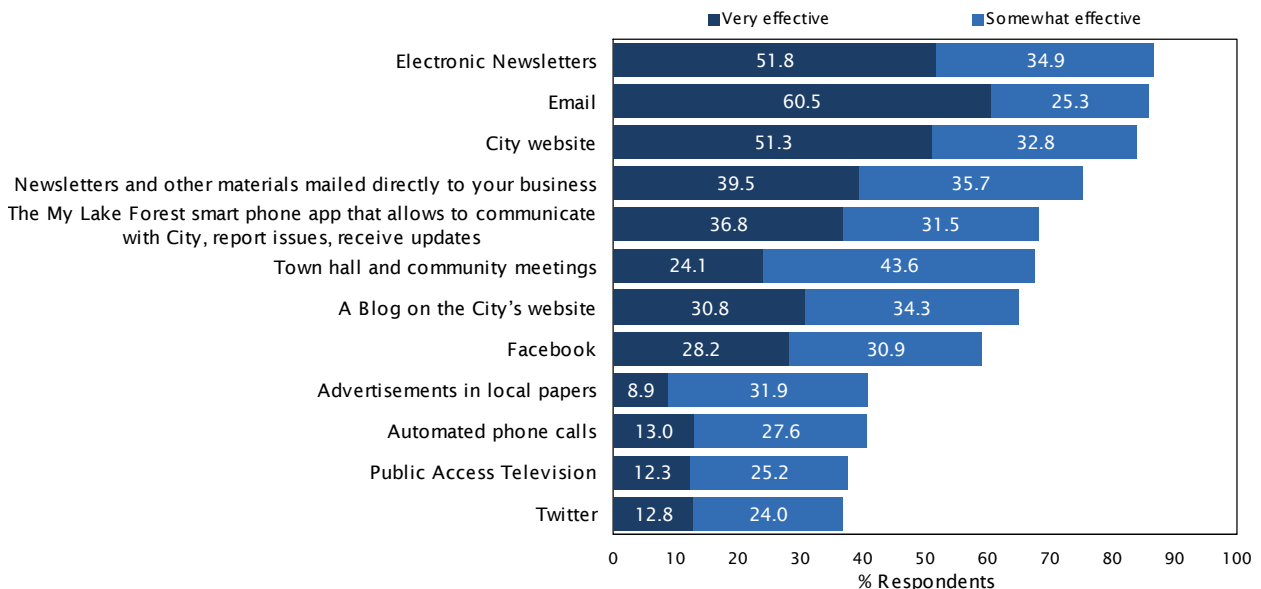


† Statistically significant difference ($p < 0.05$) between the 2018 and 2021 studies.

EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS The next communication-related question presented local businesses with each of the methods shown on the left of Figure 62 and asked if each would be an effective way for the City to communicate with them. Overall, respondents indicated that the most effective method was electronic newsletters (87% very or somewhat effective), followed by email (86%), the City’s website (84%), and newsletters and direct mail to their office (75%). Comparatively, Twitter (37%), Public Access Television (38%), and automated phone calls (41%) were rated as the least effective methods.

Question 16: 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 62 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS: BUSINESS SURVEY



For the interested reader, Table 22 displays how the percentage of local businesses that rated each method of communication as *very effective* differed by home-based business, satisfaction with the City’s communication efforts, and anticipated business size in the next year.

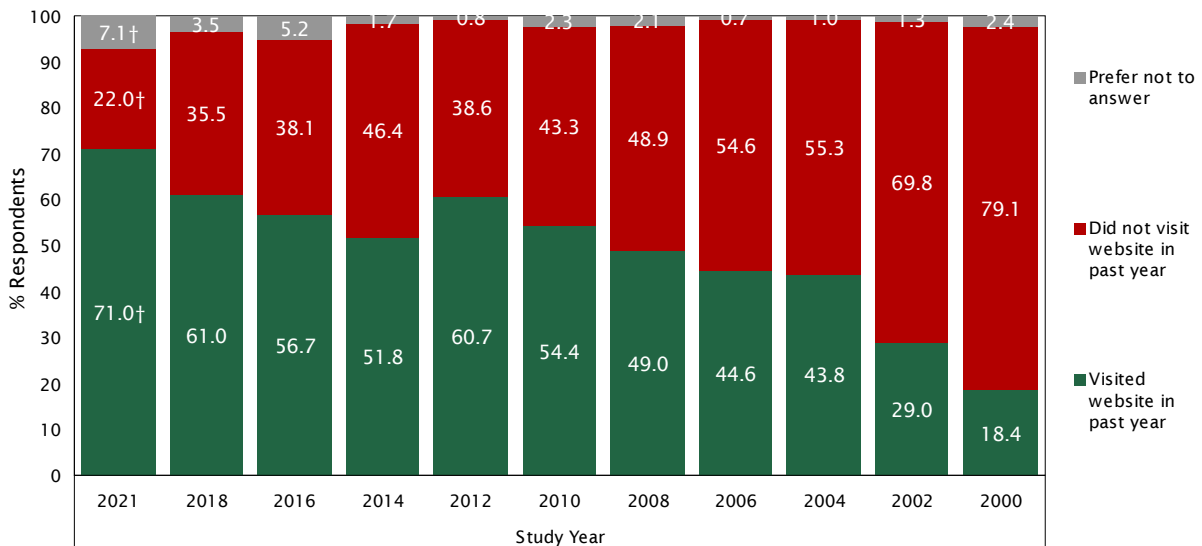
TABLE 22 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS: BUSINESS SURVEY BY HOME-BASED BUSINESS, SATISFACTION WITH COMMUNICATION & BUSINESS IN NEXT 12 MONTHS (SHOWING % VERY EFFECTIVE)

| | Home-Based Business | | Satisfaction With Communication (Q13) | | Biz Size in Next 12 Months (QD4) | | |
|--|---------------------|------|---------------------------------------|--------------|----------------------------------|----------|------------|
| | Yes | No | Satisfied | Dissatisfied | Increase | Decrease | About same |
| Email | 52.5 | 63.3 | 58.1 | 74.2 | 59.0 | 60.3 | 58.7 |
| Electronic newsletters | 47.5 | 53.2 | 50.1 | 64.1 | 48.9 | 27.4 | 57.5 |
| City website | 39.3 | 55.4 | 52.6 | 37.3 | 43.1 | 48.0 | 59.9 |
| Newsletters and other materials mailed directly to your business | 24.6 | 44.6 | 41.7 | 35.9 | 36.0 | 53.4 | 39.8 |
| My Lake Forest smart phone app | 32.8 | 38.1 | 38.6 | 29.5 | 28.6 | 34.3 | 44.3 |
| Blog on the City’s website | 26.2 | 32.4 | 31.9 | 18.0 | 27.2 | 27.4 | 34.6 |
| Facebook | 32.8 | 26.6 | 27.5 | 44.8 | 25.6 | 13.7 | 29.3 |
| Town hall and community meetings | 23.0 | 24.5 | 23.4 | 34.6 | 22.3 | 5.4 | 24.5 |
| Automated phone calls | 13.1 | 12.9 | 14.3 | 0.0 | 12.7 | 13.7 | 12.8 |
| Twitter | 8.2 | 14.4 | 13.7 | 16.6 | 6.0 | 20.6 | 18.1 |
| Public Access Television | 14.8 | 11.5 | 14.8 | 0.0 | 9.2 | 0.0 | 20.2 |
| Advertisements in local papers | 3.3 | 10.8 | 10.6 | 0.0 | 8.8 | 0.0 | 12.3 |

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. Figure 63 shows that the percentage of residents who visited one of the City’s websites has grown substantially since the 18% recorded in 2000, with 71% indicating they visited one or more of the City’s websites in 2021. The increase in visits to City websites since 2018 (+10%) is also statistically significant. Figures 64 and 65 show how use of the City’s websites in the past year varied by key resident subgroups.

Question 24: Resident Survey *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

FIGURE 63 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

FIGURE 64 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, EMPLOYMENT STATUS & CHILD IN HOME

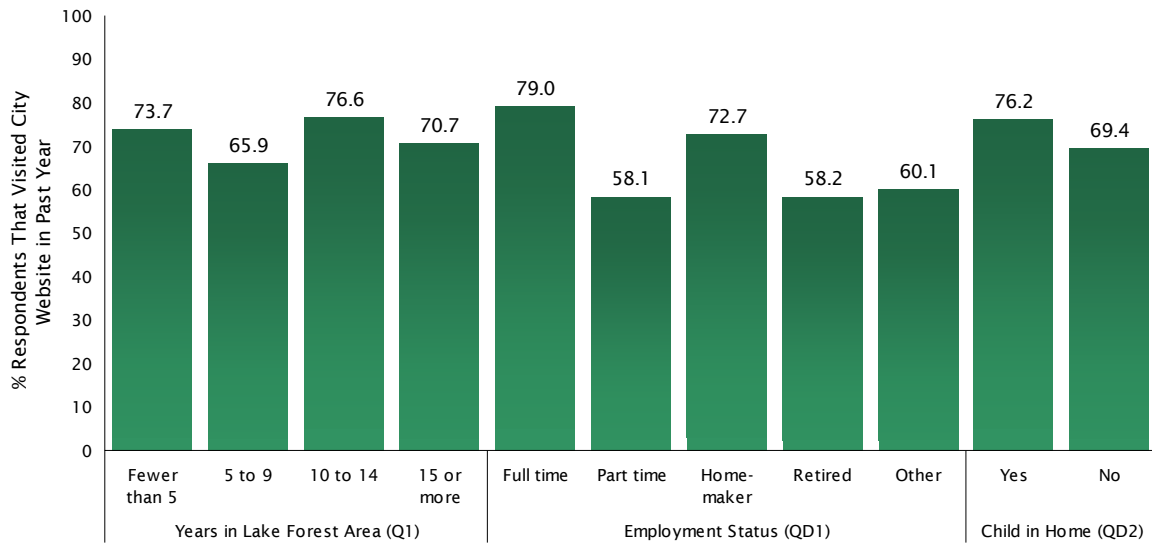
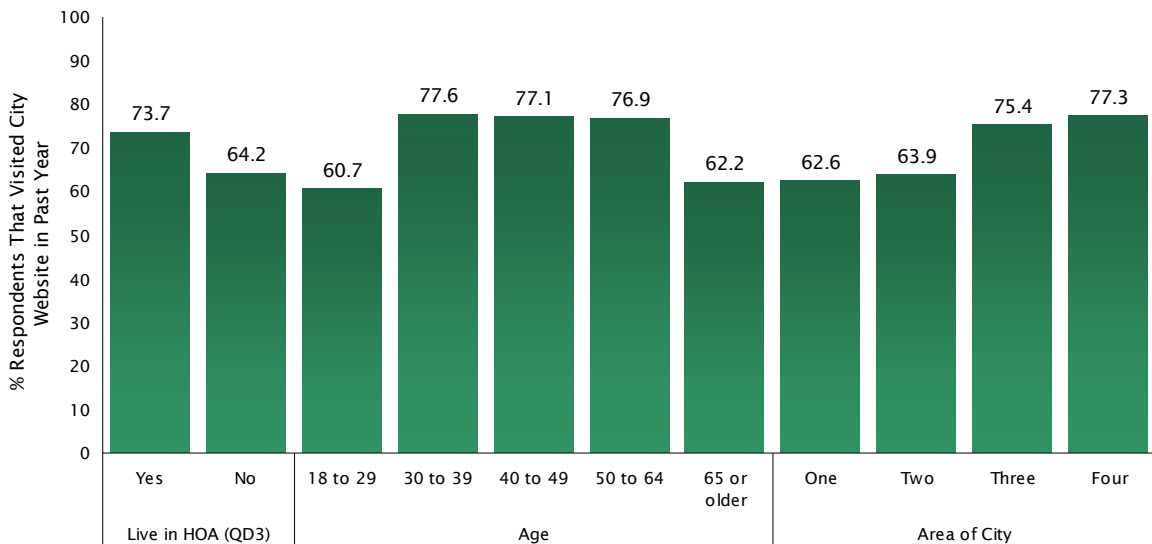


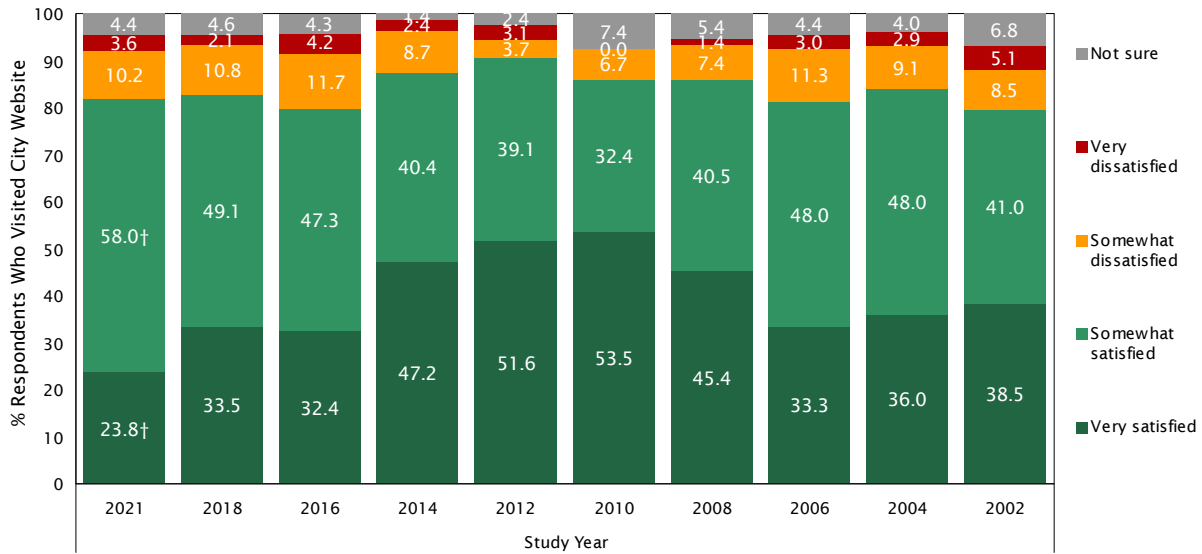
FIGURE 65 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY LIVE IN HOA, AGE & AREA OF CITY



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 66 on the next page. Overall, visitors expressed high levels of satisfaction with the City’s websites, with 82% of residents indicating they were satisfied with the resources available on the sites. Although the intensity of satisfaction experienced significant changes when compared with the 2018 survey results, the overall level of satisfaction remained virtually unchanged.

Question 25: Resident Survey Are you satisfied or dissatisfied with the resources and content available on the City's web sites?

FIGURE 66 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY BY STUDY YEAR

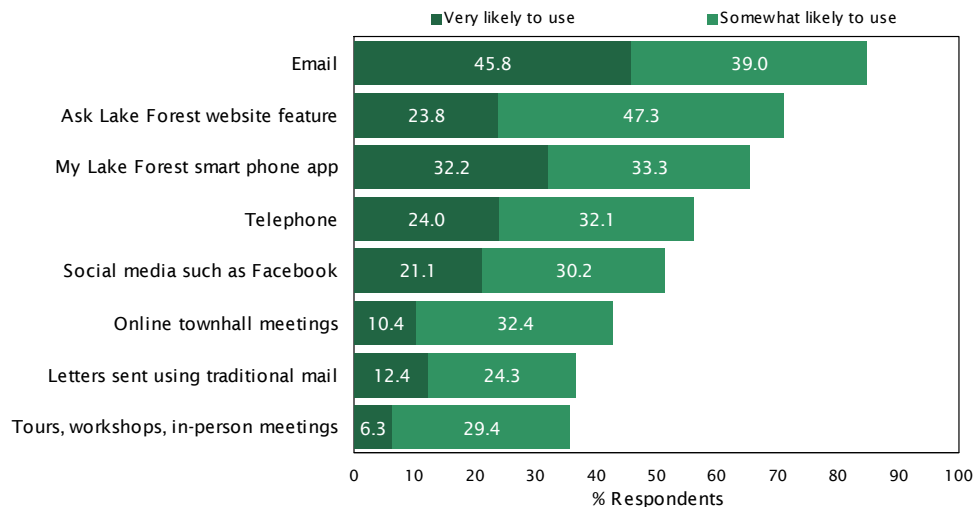


† Statistically significant difference ($p < 0.05$) between the 2018 and 2021 studies.

METHODS OF COMMUNICATING INFO TO CITY Question 26 asked residents how likely they would be to use each of the methods listed in Figure 67 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.

Question 26: 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 67 LIKELIHOOD OF USING COMMUNICATION METHODS: RESIDENT SURVEY



Among the communication methods tested, email received the highest percentage of respondents indicating they would be likely to use the method for communicating information to the City (85% very or somewhat likely), followed by the *Ask Lake Forest* website feature (72%), *My Lake Forest* smart phone app (66%), telephone (56%), and social media such as Facebook (51%). By comparison, residents were less likely to state they would use online townhall meetings (43%), letters sent via traditional mail (37%), and tours, workshops, or in-person meetings (36%) to communicate information to the City of Lake Forest. When compared with 2018, there was a statistically significant decline in the percentage of residents who indicated they were at least somewhat likely to use a telephone (-7%) to communicate information to the City (see Table 23).

TABLE 23 LIKELIHOOD OF USING COMMUNICATION METHODS: RESIDENT SURVEY BY SURVEY YEAR

| | Study Year | | | Change in Very + Smwt Likely to Use |
|--|------------|------|------|-------------------------------------|
| | 2021 | 2018 | 2016 | |
| Social media such as Facebook | 51.3 | 46.9 | 50.6 | +4.4 |
| My Lake Forest smart phone app | 65.5 | 61.3 | 67.1 | +4.2 |
| Ask Lake Forest website feature | 71.1 | 69.5 | 67.6 | +1.6 |
| Tours, workshops, and in-person meetings | 35.8 | 37.2 | 43.4 | -1.4 |
| Email | 84.8 | 87.9 | 86.0 | -3.2 |
| Online townhall meetings | 42.8 | 47.2 | 49.5 | -4.4 |
| Letters sent using traditional mail | 36.6 | 41.0 | 41.4 | -4.4 |
| Telephone | 56.1 | 63.0 | 61.4 | -6.8† |

† Statistically significant difference (p < 0.05) between the 2018 and 2021 studies.

Table 24 displays how the preferred methods of communicating information to the City of Lake Forest varied by age, presence of a child in the home, satisfaction with the City’s communication efforts, and overall satisfaction with the City’s performance.

TABLE 24 LIKELIHOOD OF USING COMMUNICATION METHODS: RESIDENT SURVEY BY AGE, CHILD IN HOME, SATISFACTION WITH COMMUNICATION & OVERALL SATISFACTION (SHOWING % VERY LIKELY)

| | Age | | | | | Child in Home (QD2) | | Satisfaction With Communication (Q22) | | Overall Satisfaction (Q5) | |
|--------------------------------------|----------|----------|----------|----------|-------------|---------------------|------|---------------------------------------|--------------|---------------------------|--------------|
| | 18 to 29 | 30 to 39 | 40 to 49 | 50 to 64 | 65 or older | Yes | No | Satisfied | Dissatisfied | Satisfied | Dissatisfied |
| Email | 44.4 | 46.4 | 43.1 | 47.1 | 46.6 | 48.0 | 45.7 | 49.5 | 38.0 | 45.3 | 49.7 |
| My Lake Forest smart phone app | 31.7 | 40.7 | 41.7 | 31.7 | 20.0 | 39.3 | 28.8 | 31.4 | 43.3 | 31.5 | 37.4 |
| Telephone | 33.2 | 9.5 | 17.4 | 25.3 | 30.8 | 18.9 | 26.2 | 23.7 | 24.4 | 23.3 | 30.5 |
| Ask Lake Forest website feature | 21.6 | 20.5 | 26.5 | 28.2 | 20.5 | 27.9 | 21.7 | 24.6 | 25.9 | 23.4 | 23.0 |
| Social media such as Facebook | 29.5 | 28.5 | 29.4 | 15.3 | 10.4 | 29.7 | 17.4 | 23.4 | 18.1 | 20.9 | 19.4 |
| Letters sent using traditional mail | 12.8 | 8.5 | 10.7 | 10.6 | 18.4 | 12.0 | 13.3 | 13.8 | 6.5 | 13.3 | 8.3 |
| Online townhall meetings | 8.9 | 13.6 | 7.9 | 13.2 | 7.4 | 13.6 | 8.3 | 9.8 | 17.1 | 9.2 | 20.3 |
| Tours, workshops, in-person meetings | 6.1 | 8.5 | 4.0 | 5.6 | 7.6 | 6.6 | 6.3 | 6.7 | 7.6 | 6.1 | 8.8 |

ECONOMIC DEVELOPMENT WEBSITE First asked in 2010, Question 17 of the business survey asked respondents whether they had ever visited the City’s economic development website at www.lakeforestbusiness.com. As shown in Figure 68, 44% of local businesses in 2021 indicated that they had visited the site, which is comparable to the value recorded in 2018 and the previous two studies. Figure 69 presents the findings of this question by select business sub-groups.

Question 17: Business Survey *Have you ever visited the City's economic development website at www.lakeforestbusiness.com?*

FIGURE 68 VISITED ECONOMIC DEVELOPMENT WEBSITE: BUSINESS SURVEY BY STUDY YEAR

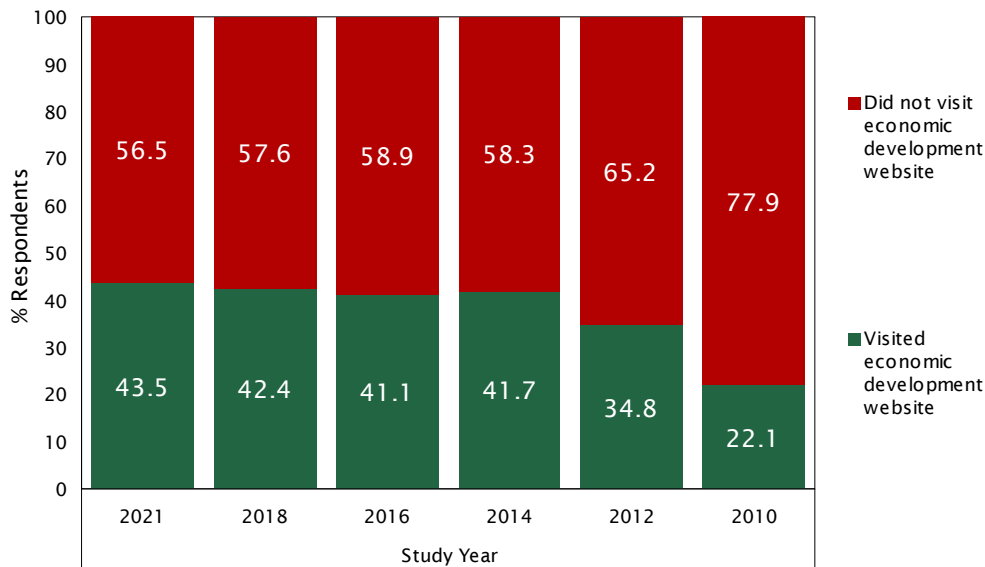
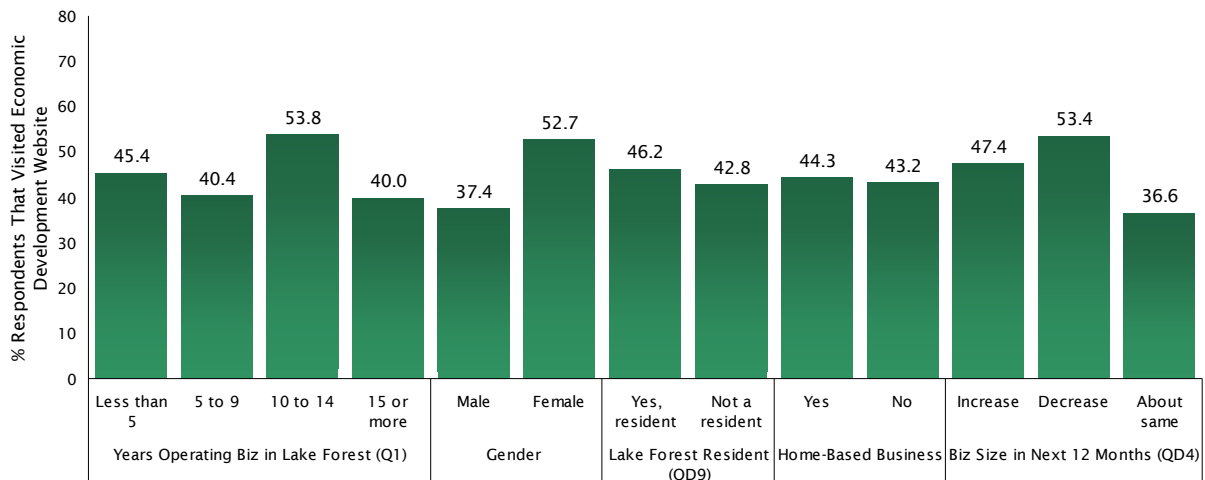


FIGURE 69 VISITED ECONOMIC DEVELOPMENT WEBSITE: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, GENDER, LAKE FOREST RESIDENT, HOME-BASED BUSINESS & BUSINESS SIZE IN NEXT 12 MONTHS



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 offers or is considering offering for local businesses. The seminar topics and respondents’ stated interest in each are shown in Figure 70.

Lake Forest businesses expressed the greatest interest in attending business networking events (68% very or somewhat interested), and seminars on business legal issues (63%) and marketing and sales (63%). When compared with 2018, there was downward trend in interest in workshop attendance, likely motivated at least in part by COVID-19 concerns and restrictions, although there were no statistically significant changes (see Table 25). Table 26 on the next page 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 70 INTEREST IN BUSINESS WORKSHOP TOPICS: BUSINESS SURVEY

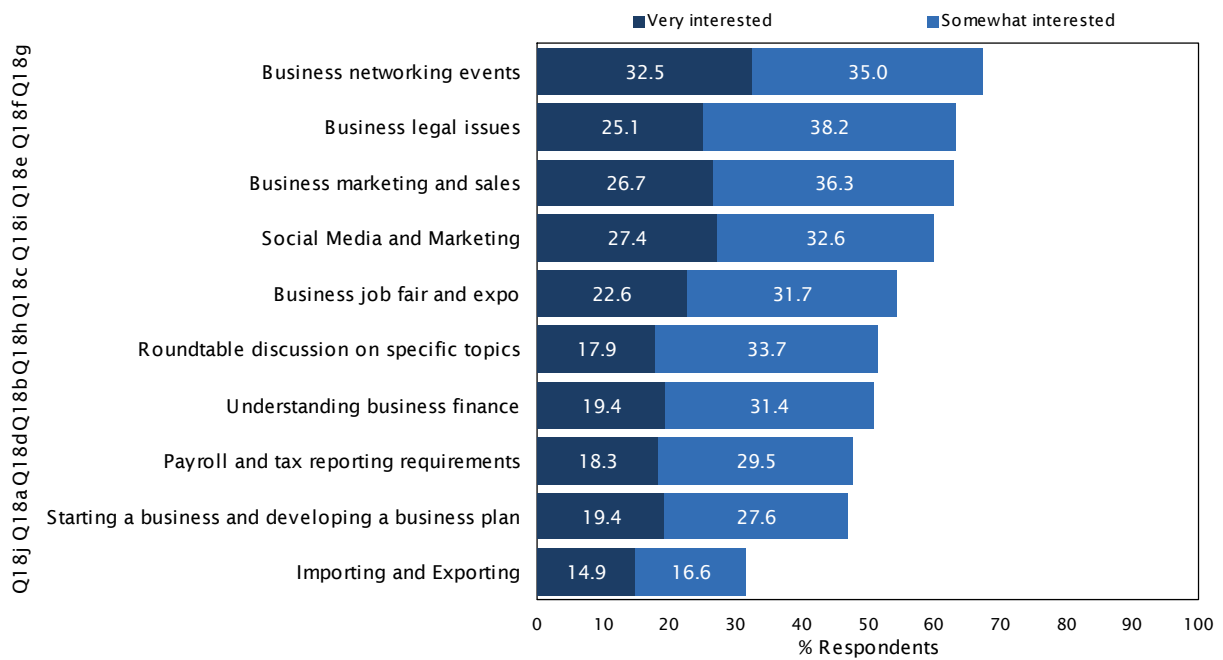


TABLE 25 INTEREST IN BUSINESS WORKSHOP TOPICS: BUSINESS SURVEY BY STUDY YEAR

| | Study Year | | Change in Very + Smwt Interested |
|--|------------|------|----------------------------------|
| | 2021 | 2018 | |
| Business legal issues | 63.3 | 62.6 | +0.7 |
| Importing and exporting | 31.6 | 33.3 | -1.7 |
| Business networking events | 67.4 | 70.4 | -3.0 |
| Starting a business and developing a business plan | 47.0 | 50.7 | -3.7 |
| Social media and marketing | 60.0 | 65.8 | -5.8 |
| Payroll and tax reporting requirements | 47.8 | 53.9 | -6.1 |
| Roundtable discussion on specific topics | 51.5 | 57.8 | -6.2 |
| Understanding business finance | 50.8 | 57.1 | -6.3 |
| Business marketing and sales | 63.0 | 70.7 | -7.7 |
| Business job fair and expo | 54.3 | 62.2 | -7.9 |

TABLE 26 INTEREST IN BUSINESS WORKSHOP TOPICS: BUSINESS SURVEY BY HOME-BASED BUSINESS, VISITED ECONOMIC DEVELOPMENT WEBSITE & BUSINESS SIZE IN NEXT 12 MONTHS (SHOWING % VERY INTERESTED)

| | Home-Based Business | | Visited Economic Development Website (Q17) | | Biz Size in Next 12 Months (QD4) | | |
|--|---------------------|------|--|------|----------------------------------|----------|------------|
| | Yes | No | Yes | No | Increase | Decrease | About same |
| Business networking events | 41.0 | 29.5 | 42.7 | 24.9 | 30.1 | 32.9 | 31.2 |
| Social Media and Marketing | 29.5 | 26.6 | 26.1 | 28.2 | 22.8 | 32.9 | 28.8 |
| Business marketing and sales | 23.0 | 28.1 | 29.5 | 24.5 | 25.6 | 19.1 | 24.8 |
| Business legal issues | 16.4 | 28.1 | 28.2 | 22.4 | 21.7 | 34.3 | 29.4 |
| Business job fair and expo | 21.3 | 23.0 | 23.7 | 21.3 | 22.1 | 20.6 | 20.2 |
| Starting a business and developing a business plan | 21.3 | 18.7 | 22.1 | 16.6 | 15.9 | 27.4 | 18.3 |
| Understanding business finance | 21.3 | 18.7 | 18.3 | 19.6 | 20.0 | 20.6 | 15.9 |
| Payroll and tax reporting requirements | 21.3 | 17.3 | 14.7 | 20.4 | 19.8 | 13.7 | 18.7 |
| Roundtable discussion on specific topics | 19.7 | 17.3 | 25.7 | 13.1 | 20.0 | 20.6 | 17.1 |
| Importing and Exporting | 8.2 | 17.3 | 14.2 | 14.5 | 16.6 | 13.7 | 13.2 |

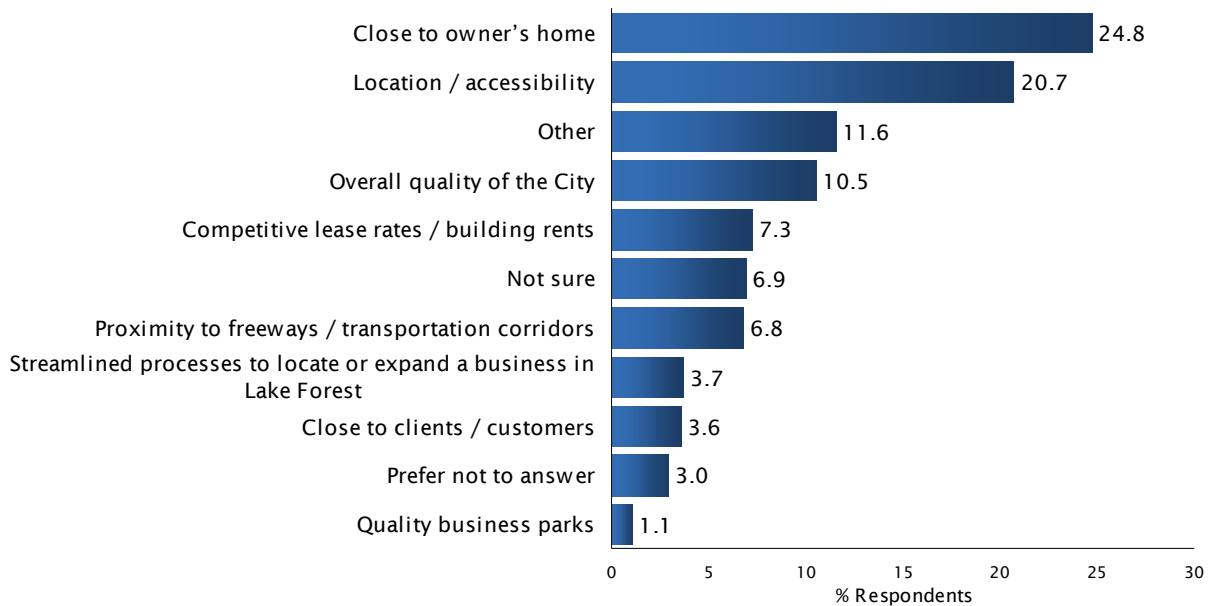
BUSINESS BACKGROUND INFO

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, one-quarter (25%) indicated that it is close to the owner's home, and an additional 21% mentioned the location/accessibility of Lake Forest. The overall quality of the City (11%), competitive lease rates/rents (7%), and proximity to freeways/transportation corridors (7%) were also mentioned by more than 5% of businesses.

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?*

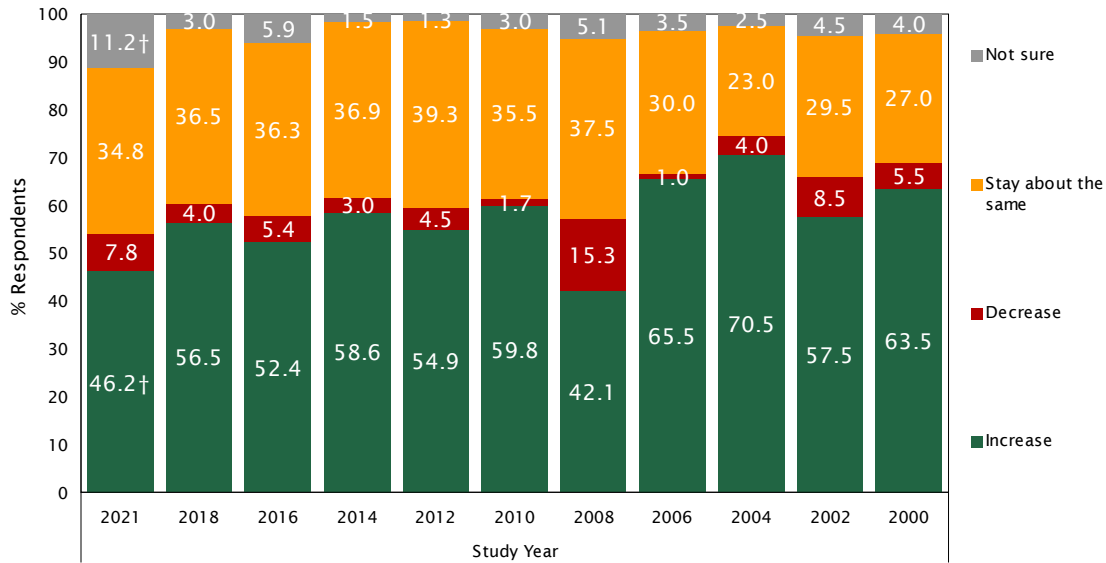
FIGURE 71 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST: BUSINESS SURVEY



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 2021 and the prior ten studies are shown in Figure 72 on the next page. Local businesses were generally optimistic about the future, with 46% anticipating growth and 35% expecting that their business would remain about the same. Another 8% indicated that they expect their business to decrease in the coming year, whereas 11% were unsure. Compared with 2018, business managers were more tentative about their expectations for the future, with a statistically significant drop in the percentage who felt business would increase (-10%) and an increase in the percentage who were unsure (+8%).

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

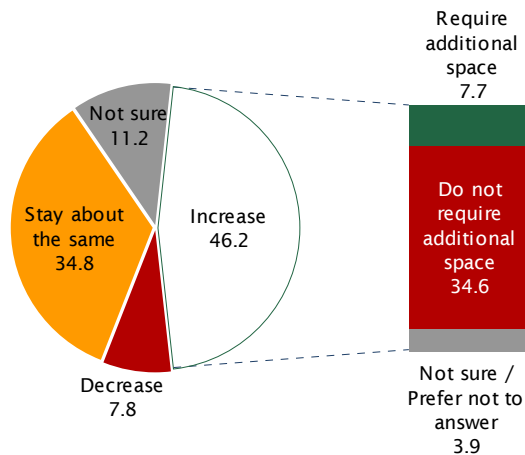
FIGURE 72 BUSINESS SIZE IN NEXT 12 MONTHS: BUSINESS SURVEY BY STUDY YEAR



Partitioning the 46% of all businesses that anticipated growth, 8% indicated that they would require additional space, whereas the remaining 39% were either unsure or did not anticipate needing additional space (see Figure 73).

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

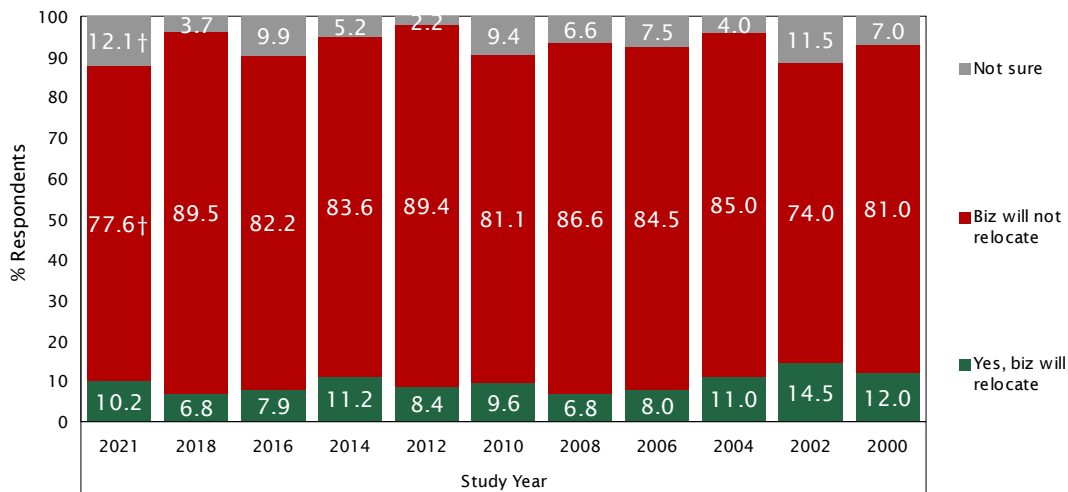
FIGURE 73 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS: BUSINESS SURVEY



RELOCATION The final substantive questions in the business survey asked respondents whether they anticipated relocating their business in the next year and, if yes, whether they were planning to relocate within Lake Forest or to another community. Figure 74 shows that the percentage of businesses that anticipated relocating in the 2021 survey was 10%. Of the 10% of businesses that anticipated relocating in the next year, approximately 5% expected to relocate to another community, 3% within Lake Forest, and the remainder were unsure (see Figure 75). Compared with the findings of the 2018 study, the percentage of businesses confident that they will not relocate over the next year decreased (-12%), whereas the percentage unsure increased (+8%).

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

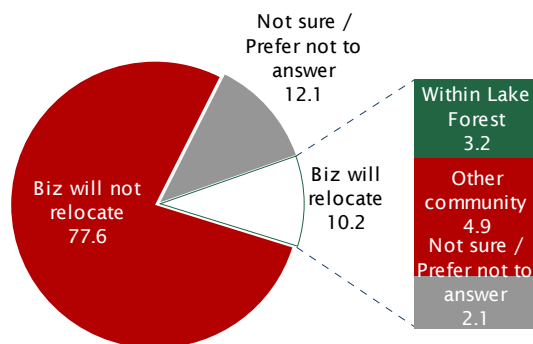
FIGURE 74 BUSINESS RELOCATION IN NEXT 12 MONTHS: BUSINESS SURVEY BY STUDY YEAR



† Statistically significant difference ($p < 0.05$) between the 2018 and 2021 studies.

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

FIGURE 75 BUSINESS RELOCATION AND AREA IN NEXT 12 MONTHS: BUSINESS SURVEY



BACKGROUND & DEMOGRAPHIC INFO

Table 27 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 27 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY BY STUDY YEAR

| Study Year | 2021 | 2018 | 2016 | 2014 | 2012 | 2010 | 2008 | 2006 | 2004 | 2002 |
|---------------------------------|------|------|------|------|------|------|------|------|------|------|
| Total Respondents | 612 | 478 | 704 | 400 | 400 | 400 | 400 | 400 | 400 | 400 |
| QD1 Employment status | | | | | | | | | | |
| Employed full-time | 54.5 | 57.8 | 50.8 | 49.7 | 56.5 | 51.2 | 54.6 | 58.5 | N/A | N/A |
| Employed part-time | 9.4 | 7.5 | 11.1 | 9.4 | 10.6 | 9.1 | 13.7 | 11.0 | N/A | N/A |
| Student | 3.4 | 5.9 | 5.1 | 4.0 | 5.5 | 3.6 | 2.6 | 3.7 | N/A | N/A |
| Homemaker | 5.0 | 5.2 | 4.6 | 9.0 | 3.2 | 5.0 | 8.4 | 7.9 | N/A | N/A |
| Retired | 19.4 | 18.8 | 23.4 | 20.0 | 18.1 | 19.2 | 13.6 | 16.0 | N/A | N/A |
| In-between jobs | 4.9 | 2.2 | 2.5 | 4.3 | 4.7 | 9.0 | 6.0 | 1.9 | N/A | N/A |
| Prefer not to answer | 3.4 | 2.6 | 2.5 | 3.6 | 1.5 | 2.9 | 0.9 | 1.1 | N/A | N/A |
| QD2 Child in home | | | | | | | | | | |
| Yes | 34.1 | 36.4 | 37.7 | 36.0 | 38.7 | 43.9 | 41.3 | 43.4 | 44.5 | 44.8 |
| No | 62.6 | 61.6 | 61.0 | 60.3 | 59.8 | 54.0 | 58.5 | 56.4 | 55.0 | 54.3 |
| Prefer not to answer | 3.3 | 2.0 | 1.3 | 3.7 | 1.5 | 2.1 | 0.2 | 0.2 | 0.5 | 1.0 |
| QD3 Live in HOA | | | | | | | | | | |
| Yes | 72.9 | 73.9 | 70.4 | 68.8 | 73.8 | 75.6 | 74.8 | 73.3 | 72.8 | 73.3 |
| No | 23.8 | 24.7 | 28.0 | 26.9 | 24.5 | 22.2 | 24.4 | 25.6 | 26.0 | 25.3 |
| Prefer not to answer | 3.4 | 1.4 | 1.6 | 4.3 | 1.7 | 2.2 | 0.8 | 1.1 | 1.3 | 1.5 |
| QD4 Household income | | | | | | | | | | |
| Under \$40K | 6.5 | 7.9 | 8.8 | 9.6 | 10.7 | 10.6 | 8.1 | 7.0 | 9.5 | 11.5 |
| \$40K to \$59K | 11.9 | 10.1 | 10.7 | 12.0 | 13.7 | 11.8 | 10.1 | 10.3 | 14.8 | 15.3 |
| \$60K to \$79K | 9.6 | 13.4 | 11.4 | 10.2 | 10.1 | 13.4 | 13.9 | 16.8 | 21.0 | 12.8 |
| \$80K to \$99K | 10.8 | 16.1 | 11.8 | 11.9 | 12.7 | 15.8 | 15.9 | 10.7 | 13.3 | 17.0 |
| \$100K or more | 49.2 | 41.6 | 43.3 | 35.6 | 39.9 | 36.0 | 36.6 | 42.4 | 31.3 | 29.3 |
| Not sure / Prefer not to answer | 12.0 | 10.8 | 14.0 | 20.8 | 12.9 | 12.5 | 15.4 | 12.9 | 10.3 | 14.3 |
| QD8 Gender | | | | | | | | | | |
| Male | 48.4 | 51.6 | 46.8 | 46.1 | 47.7 | 47.7 | 47.7 | 47.5 | 49.8 | 49.3 |
| Female | 47.5 | 46.5 | 52.0 | 53.9 | 52.3 | 52.3 | 52.3 | 52.5 | 50.3 | 50.8 |
| Prefer not to answer | 4.2 | 1.9 | 1.2 | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| S1 Party | | | | | | | | | | |
| Democrat | 33.1 | 30.5 | 32.4 | 30.3 | 28.0 | 26.7 | 26.9 | 25.5 | 28.3 | 26.5 |
| Republican | 37.8 | 37.1 | 41.9 | 38.8 | 44.8 | 49.6 | 50.2 | 52.5 | 50.3 | 54.8 |
| Other | 6.5 | 6.0 | 4.8 | 3.9 | 3.5 | 4.9 | 4.4 | 5.1 | 4.3 | 4.8 |
| DTS | 22.6 | 26.4 | 21.0 | 27.0 | 23.6 | 18.8 | 18.5 | 17.0 | 17.3 | 14.0 |
| S2 Age | | | | | | | | | | |
| 18 to 29 | 17.6 | 16.3 | 16.3 | 14.8 | 15.3 | 11.1 | 13.4 | 13.4 | 14.5 | 14.8 |
| 30 to 39 | 16.8 | 15.9 | 13.7 | 13.9 | 15.2 | 15.3 | 17.2 | 16.9 | 20.8 | 22.8 |
| 40 to 49 | 15.6 | 15.8 | 15.5 | 19.6 | 21.1 | 23.9 | 25.9 | 26.9 | 28.8 | 26.5 |
| 50 to 64 | 28.0 | 31.3 | 31.3 | 32.5 | 31.5 | 32.2 | 28.6 | 29.9 | 23.8 | 23.5 |
| 65 and older | 22.0 | 20.7 | 23.2 | 19.1 | 16.9 | 17.5 | 14.9 | 13.0 | 12.3 | 12.3 |
| S6 Home Ownership status | | | | | | | | | | |
| Own | 63.8 | 65.1 | 68.4 | 70.3 | 69.5 | 79.9 | 72.0 | 75.3 | 66.5 | N/A |
| Rent | 36.2 | 34.9 | 31.6 | 29.7 | 30.5 | 20.1 | 28.0 | 24.7 | 33.5 | N/A |

Table 28 provides information that was collected from local businesses during the 2021 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 28 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY BY STUDY YEAR

| <i>Study Year</i> | 2021 | 2018 | 2016 | 2014 | 2012 | 2010 | 2008 | 2006 | 2004 | 2002 | 2000 |
|---|------|------|------|------|------|------|------|------|------|------|------|
| Total Respondents | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 |
| Number of employees (QD1) | | | | | | | | | | | |
| 1 | 26.2 | 23.1 | 23.6 | 21.3 | 14.2 | 20.8 | N/A | N/A | N/A | N/A | N/A |
| 2 to 5 | 32.7 | 30.2 | 32.4 | 38.3 | 34.9 | 37.1 | N/A | N/A | N/A | N/A | N/A |
| 6 to 10 | 13.0 | 14.8 | 19.4 | 17.2 | 17.0 | 12.7 | N/A | N/A | N/A | N/A | N/A |
| More than 10 | 23.2 | 22.2 | 20.2 | 19.9 | 31.7 | 26.7 | N/A | N/A | N/A | N/A | N/A |
| Prefer not to answer | 4.9 | 9.7 | 4.4 | 3.3 | 2.2 | 2.7 | N/A | N/A | N/A | N/A | N/A |
| Number of employees live outside Lake Forest (QD2) | | | | | | | | | | | |
| None | 26.6 | 21.1 | 24.3 | 28.6 | 15.1 | 27.2 | N/A | N/A | N/A | N/A | N/A |
| 1 | 8.5 | 16.9 | 12.5 | 16.7 | 15.5 | 11.0 | N/A | N/A | N/A | N/A | N/A |
| 2 to 5 | 30.1 | 21.2 | 26.8 | 24.2 | 29.3 | 28.3 | N/A | N/A | N/A | N/A | N/A |
| 6 to 10 | 9.9 | 17.2 | 13.5 | 13.9 | 14.6 | 10.9 | N/A | N/A | N/A | N/A | N/A |
| More than 10 | 16.3 | 12.8 | 14.4 | 14.0 | 20.7 | 19.5 | N/A | N/A | N/A | N/A | N/A |
| Prefer not to answer | 8.5 | 10.9 | 8.5 | 2.7 | 4.8 | 3.1 | N/A | N/A | N/A | N/A | N/A |
| Resident of Lake Forest (QD9) | | | | | | | | | | | |
| Yes | 43.3 | 49.8 | 53.3 | 44.7 | 34.2 | 47.2 | 34.5 | 30.5 | 23.5 | 42.5 | N/A |
| No | 54.8 | 49.7 | 46.7 | 54.1 | 65.8 | 52.8 | 63.5 | 68.5 | 76.5 | 55.0 | N/A |
| Prefer not to answer | 1.9 | 0.5 | 0.0 | 1.2 | 0.0 | 0.0 | 2.0 | 1.0 | 0.0 | 2.5 | N/A |
| Gender (QS1) | | | | | | | | | | | |
| Male | 63.9 | 61.1 | 65.4 | 58.8 | 58.1 | 64.1 | 58.0 | 58.0 | 57.0 | 68.0 | 71.0 |
| Female | 34.0 | 36.3 | 34.0 | 41.2 | 41.9 | 35.9 | 42.0 | 42.0 | 43.0 | 32.0 | 29.0 |
| Prefer not to answer | 2.1 | 2.6 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Home-Based Business | | | | | | | | | | | |
| Yes | 25.8 | 26.0 | 28.4 | 29.0 | 15.0 | 27.3 | 15.0 | 12.5 | 12.5 | 13.0 | N/A |
| No | 74.2 | 74.0 | 71.6 | 71.0 | 85.0 | 72.7 | 85.0 | 87.5 | 87.5 | 87.0 | 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 78) identify the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

PROGRAMMING & 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, and 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 4,800 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 61 interviews were collected among home-based businesses, with the remaining 139 interviews drawn proportionately from non home-based businesses stratified according to their location within the City.

RECRUITING AND DATA COLLECTION The survey followed a mixed-method design that employed multiple recruiting methods (phone and email) and multiple data collection methods (phone and online). Phone 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 those 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 January 15 and January 31, 2021, a total of 612 residents completed the survey.

In a manner similar to that described above, the business survey also employed multiple recruiting (phone and email) and data collection methods (phone and online). The 18-minute survey of businesses was administered to a stratified random sample of 200 local business owners and managers between January 20 and February 16, 2021.

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 612 voters for a particular question and what would have been found if all 52,223 voters in Lake Forest had been surveyed.

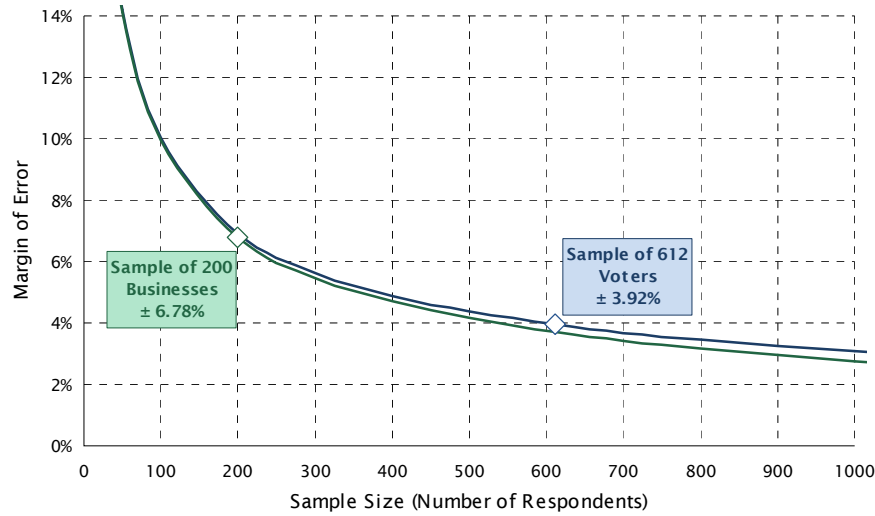
For example, in estimating the percentage of registered voters who have visited one or more of the City of Lake Forest’s websites in the past year (Question 24 of the resident survey), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence 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 (0.71 for 71% in this example), N is the population size of all registered voters (52,223), n is the sample size that received the question (612), 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 $\pm 3.58\%$. This means that with 71% 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 67% and 75%.

Figure 76 on the next page 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 612 registered voters is $\pm 3.92\%$, and the maximum margin of error for questions answered by all 200 business managers is $\pm 6.78\%$.

FIGURE 76 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by subgroups such as years living in Lake Forest, age of the respondent, and location of household. Figure 76 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 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 2018 and 2021 was large enough to be considered statistically significant.

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 figures for a given question.

QUESTIONNAIRES & TOPLINES

RESIDENT SURVEY



City of Lake Forest
Voter Survey
Final Toplines (n=612)
February 2021

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 | 16% |
| 3 | 10 years to less than 15 years | 12% |
| 4 | 15 or more years | 46% |
| 99 | Not sure/Prefer not to answer | 1% |

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 | 31% |
| 2 | Good | 59% |
| 3 | Fair | 9% |
| 4 | Poor | 0% |
| 5 | Very Poor | 0% |
| 98 | Not sure | 0% |
| 99 | Prefer not to answer | 0% |

| Q3 How would you rate: _____? Would you say it is excellent, good, fair, poor or very poor? | | | | | | | | |
|---|---|-----------|------|------|------|-----------|----------|----------------------|
| | <i>Randomize A-D</i> | Excellent | Good | Fair | Poor | Very Poor | Not Sure | Prefer not to answer |
| A | Lake Forest as a place to raise a family | 38% | 46% | 10% | 1% | 1% | 3% | 0% |
| B | Lake Forest as a place to retire | 22% | 31% | 24% | 9% | 5% | 9% | 0% |
| C | Lake Forest as a place to work | 15% | 37% | 21% | 4% | 1% | 21% | 1% |
| D | Lake Forest as a place to shop and dine | 18% | 42% | 29% | 8% | 3% | 1% | 0% |
| Q4 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 | | | | | | | 16% |
| | Attract new restaurants, stores | | | | | | | 13% |
| | Limit growth, development | | | | | | | 11% |
| | No changes needed / Everything is fine | | | | | | | 11% |
| | Improve public safety | | | | | | | 9% |
| | Address homeless, poverty issues | | | | | | | 7% |
| | Reduce traffic congestion | | | | | | | 5% |
| | Clean up, improve appearance, rebuild deteriorating areas | | | | | | | 5% |
| | Improve parks, recreation | | | | | | | 5% |
| | Address parking issues | | | | | | | 4% |
| | Develop walkable shopping, dining areas | | | | | | | 4% |
| | Improve education, schools | | | | | | | 3% |
| | Provide more affordable housing | | | | | | | 3% |
| | Improve, repair infrastructure | | | | | | | 2% |
| | Provide more community-focused events | | | | | | | 2% |
| | Improve outreach, communication, transparency | | | | | | | 2% |
| | Enforce traffic laws, safety | | | | | | | 2% |
| | Reduce cost of living | | | | | | | 2% |
| | Improve city planning | | | | | | | 2% |
| | Address COVID-related concerns | | | | | | | 2% |

| | | | |
|----|--|-----------------------|-----|
| Q5 | 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 | 32% |
| | 2 | Somewhat satisfied | 49% |
| | 3 | Somewhat dissatisfied | 10% |
| | 4 | Very dissatisfied | 3% |
| | 98 | Not sure | 6% |
| | 99 | Prefer not to answer | 1% |

Section 3: Police Department

Q6 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 | 30% | 38% | 21% | 10% | 1% | 0% |
| B | Investigating criminal activity | 63% | 31% | 3% | 0% | 2% | 0% |
| C | Providing child safety programs | 39% | 37% | 18% | 4% | 3% | 0% |
| D | Enforcing traffic laws | 28% | 40% | 27% | 4% | 1% | 0% |
| E | Maintaining a low crime rate | 71% | 23% | 4% | 0% | 0% | 1% |
| F | Preparing for emergencies | 54% | 36% | 9% | 0% | 1% | 0% |
| G | Providing crossing guards near schools | 33% | 39% | 20% | 6% | 2% | 0% |
| H | Providing animal control services | 20% | 34% | 32% | 11% | 3% | 1% |

Q7 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 | 16% | 33% | 13% | 3% | 34% | 1% |
| B | Investigate criminal activity | 25% | 30% | 12% | 4% | 28% | 0% |

| | | | | | | | |
|---|--------------------------------------|-----|-----|-----|----|-----|----|
| C | Provide child safety programs | 18% | 27% | 5% | 1% | 47% | 2% |
| D | Enforce traffic laws | 23% | 28% | 6% | 2% | 40% | 1% |
| E | Maintain a low crime rate | 34% | 40% | 12% | 4% | 9% | 0% |
| F | Prepare for emergencies | 31% | 32% | 9% | 5% | 23% | 0% |
| G | Provide crossing guards near schools | 43% | 31% | 3% | 0% | 23% | 0% |
| H | Provide animal control services | 26% | 33% | 7% | 2% | 30% | 2% |

Section 4: Development Services

Q8 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% | 37% | 25% | 12% | 8% | 0% |
| B | Inspecting buildings | 27% | 36% | 24% | 7% | 7% | 0% |
| C | Enforcing zoning regulations | 23% | 35% | 25% | 8% | 8% | 1% |
| D | Enforcing sign regulations | 20% | 31% | 28% | 13% | 8% | 1% |

Q9 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 | 14% | 24% | 6% | 3% | 51% | 2% |
| B | Inspect buildings | 16% | 21% | 5% | 1% | 54% | 3% |
| C | Enforce zoning regulations | 13% | 25% | 7% | 2% | 50% | 2% |
| D | Enforce sign regulations | 15% | 27% | 7% | 2% | 47% | 3% |

Q10 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 | 11% |
| 2 | No | 87% |
| 98 | Not sure | 2% |
| 99 | Prefer not to answer | 0% |

| Section 5: Public Works Department | | | | | | | |
|---|--|---------------------|----------------|--------------------|-----------------------|-------------------|----------------------|
| Q11 | 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 | 31% | 42% | 22% | 4% | 0% | 0% |
| B | Maintaining trees | 38% | 44% | 16% | 1% | 0% | 0% |
| C | Preventing storm-water pollution | 43% | 41% | 12% | 3% | 1% | 0% |
| D | Reducing traffic congestion | 51% | 32% | 14% | 3% | 0% | 0% |
| E | Maintaining local streets and roads | 55% | 39% | 6% | 0% | 0% | 0% |
| F | Providing bike paths and pedestrian facilities | 41% | 39% | 16% | 4% | 0% | 0% |
| G | Maintaining parks and picnic areas | 49% | 40% | 11% | 0% | 0% | 0% |
| H | Maintaining public landscapes | 37% | 43% | 19% | 1% | 0% | 0% |
| I | Garbage collection services | 55% | 40% | 5% | 0% | 0% | 0% |
| J | Recycling services | 41% | 40% | 14% | 4% | 0% | 0% |
| Q12 | 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 |
| A | Provide street sweeping services | 39% | 37% | 10% | 5% | 8% | 0% |
| B | Maintain trees | 40% | 43% | 9% | 2% | 6% | 0% |
| C | Prevent storm-water pollution | 22% | 34% | 8% | 1% | 32% | 2% |
| D | Reduce traffic congestion | 20% | 44% | 19% | 9% | 8% | 0% |
| E | Maintain local streets and roads | 35% | 46% | 13% | 3% | 3% | 0% |
| F | Provide bike paths and pedestrian facilities | 38% | 42% | 9% | 3% | 7% | 1% |
| G | Maintain parks and picnic areas | 45% | 43% | 7% | 1% | 4% | 0% |
| H | Maintain public landscapes | 42% | 44% | 7% | 1% | 5% | 0% |
| I | Provide garbage collection services | 56% | 34% | 4% | 3% | 4% | 0% |
| J | Provide recycling services | 34% | 39% | 9% | 6% | 12% | 1% |

| Section 6: Community Services Department | | | | | | | |
|---|--|---|--------------------|-----------------------|-------------------|----------|----------------------|
| Q13 | | <p>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.</p> <p>Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?</p> | | | | | |
| <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 | 29% | 32% | 20% | 10% | 8% | 2% |
| B | Providing recreation programs for pre-school children | 24% | 28% | 22% | 15% | 8% | 2% |
| C | Providing recreation and sports programs for elementary school-aged children | 28% | 36% | 19% | 8% | 7% | 2% |
| D | Providing recreation and sports programs for teens | 32% | 35% | 18% | 6% | 7% | 2% |
| E | Providing adult recreation programs such as classes, concerts and trips | 21% | 29% | 31% | 13% | 5% | 1% |
| F | Providing adult sports programs | 17% | 28% | 31% | 17% | 5% | 1% |
| G | Providing recreation programs for seniors | 23% | 37% | 25% | 7% | 6% | 1% |
| H | Providing recreation programs for families | 19% | 38% | 26% | 10% | 6% | 1% |
| I | Providing special events like concerts in the park and the Fourth of July Parade | 28% | 37% | 24% | 6% | 4% | 1% |
| J | Providing recreation programs for special needs children | 34% | 37% | 16% | 6% | 6% | 1% |
| K | Providing summer-specific recreation programs such as camps | 24% | 33% | 27% | 9% | 6% | 2% |
| Q14 | | <p>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.</p> <p>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></p> | | | | | |
| <i>Randomize</i> | | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Very Dissatisfied | Not sure | Prefer not to answer |
| A | Provide after school recreation programs | 17% | 26% | 7% | 2% | 45% | 3% |
| B | Provide recreation programs for pre-school children | 16% | 23% | 7% | 1% | 48% | 4% |
| C | Provide recreation and sports programs for elementary school-aged children | 19% | 24% | 6% | 1% | 46% | 3% |
| D | Provide recreation and sports programs for teens | 16% | 26% | 8% | 1% | 45% | 4% |

| | | | | | | | |
|---|--|-----|-----|----|----|-----|----|
| E | Provide adult recreation programs such as classes, concerts and trips | 17% | 29% | 7% | 4% | 41% | 3% |
| F | Provide adult sports programs | 16% | 25% | 8% | 4% | 45% | 3% |
| G | Provide recreation programs for seniors | 17% | 23% | 7% | 2% | 48% | 3% |
| H | Provide recreation programs for families | 17% | 25% | 8% | 2% | 45% | 4% |
| I | Provide special events like concerts in the park and the Fourth of July Parade | 26% | 35% | 9% | 3% | 25% | 2% |
| J | Provide recreation programs for special needs children | 12% | 20% | 9% | 2% | 54% | 4% |
| K | Provide summer-specific recreation programs such as camps | 17% | 25% | 6% | 2% | 47% | 3% |

Section 7: Traffic

| | | | | | | | | |
|-----|---|---|---------------|------------|------------|------------|---------------|---------------------------------|
| Q15 | | 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? <i>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.</i> | | | | | | |
| | | <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 | 53% | 4% | 10% | 17% | 34% | 26% | 9% |
| B | On major streets within Lake Forest | 41% | 8% | 18% | 25% | 27% | 15% | 7% |
| C | In residential areas within Lake Forest | 14% | 46% | 26% | 11% | 6% | 2% | 8% |
| Q16 | | 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? | | | | | | |
| | 1 | Less | | | | | | 46% |
| | 2 | About the Same | | | | | | 38% |
| | 3 | More | | | | | | 12% |
| | 98 | Not sure | | | | | | 4% |
| | 99 | Prefer not to answer | | | | | | 1% |
| Q17 | | 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: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i> | | | | | | |
| | 1 | Very satisfied | | | | | | 21% |
| | 2 | Somewhat satisfied | | | | | | 49% |
| | 3 | Somewhat dissatisfied | | | | | | 17% |
| | 4 | Very dissatisfied | | | | | | 6% |
| | 98 | Not sure | | | | | | 7% |
| | 99 | Prefer not to answer | | | | | | 0% |

| Q18 | 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. | |
|-----|--|-----|
| | Not sure / Cannot think of anything | 38% |
| | Address traffic on major streets and roads (El Toro, Rockfield, Trabuco, Lake Forest, Saddleback Ranch, Portola, Bake Pkwy, Serrano Rd) | 12% |
| | Synchronize traffic signals | 11% |
| | No need / Shouldn't fund transportation projects | 8% |
| | Increase, improve transit schedules, buses, routes | 6% |
| | Reduce traffic congestion in general | 5% |
| | Improve, repair streets and roads | 4% |
| | Expand, wide roads | 4% |
| | Limit growth, development | 3% |
| | Improve, add safer bike lanes | 2% |
| | Enforce traffic laws | 2% |
| | Complete Portola Parkway | 1% |
| | Provide metro, bullet train | 1% |
| | Provide free shuttles for elderly, disabled, low-income residents | 1% |
| | Improve traffic around schools | 1% |
| | Improve parking near residential areas, schools | 1% |
| | Improve, add left turn traffic arrows | 1% |

| Section 8: Neighborhood Issues, Housing & CCA | | | | | | | |
|---|---|-------------|------------------|---------------|---------------|----------|----------------------|
| Q19 | As I read the following issues, please indicate whether each issue is a big problem, a moderate problem, a small problem, or not a problem in <u>your</u> neighborhood. | | | | | | |
| | | Big Problem | Moderate Problem | Small Problem | Not a Problem | Not Sure | Prefer not to answer |
| | <i>Randomize</i> | | | | | | |
| A | Graffiti | 12% | 14% | 22% | 48% | 3% | 0% |
| B | Recreational vehicles parked on the street for more than 72 hours at a time | 11% | 16% | 21% | 47% | 6% | 0% |
| C | Landscapes and buildings <u>not</u> being properly maintained | 9% | 13% | 24% | 50% | 3% | 0% |
| D | Too many people living in one house | 12% | 16% | 15% | 47% | 10% | 0% |
| E | Excessive noise | 10% | 17% | 27% | 45% | 1% | 0% |
| F | Illegally parked vehicles | 15% | 17% | 23% | 41% | 4% | 0% |

| | | | | | | | | |
|-----|---|----------------------------|----------------------|----------------------|------------------|----------|----------------------|--|
| G | Too many vehicles for a single home | 21% | 20% | 23% | 32% | 4% | 0% | |
| H | Garages that have been converted to living spaces | 13% | 8% | 14% | 50% | 14% | 0% | |
| Q20 | <p>The City of Lake Forest is considering offering electricity services directly to residents and businesses in the near future. Under this potential new program, residents will have the option to purchase electricity from the City or continue to purchase electricity from Southern California Edison. As I read several features of the City's electricity program, I'd like to know how they may impact your likelihood of purchasing your electricity from the City.</p> <p>Here is the (first/next) one: _____. Would this make you more or less likely to purchase electricity from the City? <i>Get answer, then ask:</i> Would that be much (more/less) likely or somewhat (more/less) likely?</p> | | | | | | | |
| | <i>Randomize</i> | Much more likely | Somewhat more likely | Somewhat less likely | Much less likely | Not Sure | Prefer not to answer | |
| A | The rates charged would be lower | 63% | 22% | 2% | 4% | 8% | 2% | |
| B | The rates charged would be more stable over time | 40% | 36% | 5% | 5% | 14% | 1% | |
| C | A greater amount of the electricity would be produced through renewable sources like solar, wind and biomass | 45% | 27% | 5% | 7% | 13% | 2% | |
| D | There would be local control over the type of electricity offered | 28% | 33% | 6% | 8% | 24% | 2% | |
| Q21 | If the cost of electricity were the same , who would you prefer to be your electricity provider: _____ OR _____? <i>Randomize Order.</i> | | | | | | | |
| | 1 | The City of Lake Forest | | | | | 38% | |
| | 2 | Southern California Edison | | | | | 29% | |
| | 98 | Not sure | | | | | 31% | |
| | 99 | Prefer not to answer | | | | | 2% | |

Section 9: City-Resident Communication

| | | | | | | | |
|-----|--|-----------------------|--|--|--|--|-----|
| Q22 | Are you satisfied or dissatisfied with the City's efforts to communicate with residents 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 | | | | | 32% |
| | 2 | Somewhat satisfied | | | | | 47% |
| | 3 | Somewhat dissatisfied | | | | | 10% |
| | 4 | Very dissatisfied | | | | | 4% |
| | 98 | Not sure | | | | | 7% |
| | 99 | Prefer not to answer | | | | | 1% |

| Q23 | What information sources do you use to find out about City of Lake Forest news, information and programming? <i>Don't read list. Record up to first 2 responses.</i> <i>If they say Internet or web, probe to see if a City website and - if yes - which one.</i> | | |
|------------------------------------|--|--|-----|
| City Sources | | | |
| | 1 | The Leaflet - City Newsletter | 43% |
| | 2 | Leisure Times - included in the Leaflet | 4% |
| | 3 | City Newsletter - no mention of Leaflet or Leisure Times | 2% |
| | 4 | E-newsletter - electronic newsletter | 4% |
| | 5 | City Council Meetings | 1% |
| | 6 | Lake Forest Shop & Dine App | 1% |
| | 7 | My Lake Forest Smartphone App | 3% |
| | 8 | Text Messages from City/Nixle | 9% |
| | 9 | City of Lake Forest Alexa Skill | 1% |
| | 10 | City Website (not specific) | 11% |
| | 11 | Skatepark site (Etnies) | 0% |
| | 12 | Main City Web Page | 6% |
| | 13 | Economic Development Website | 0% |
| | 14 | Flyers at City Facilities | 1% |
| Newspaper, Radio, & TV | | | |
| | 15 | Saddleback Valley News (paper) | 1% |
| | 16 | Orange County Register (paper) | 9% |
| | 17 | Los Angeles Times (paper) | 0% |
| | 18 | Radio | 0% |
| | 19 | Television | 3% |
| Internet & Social Media | | | |
| | 20 | Internet, not a City site | 11% |
| | 21 | Social Media like Facebook, Twitter and Instagram | 29% |
| | 22 | Lake Forest Patch - the Patch | 9% |
| | 23 | Nextdoor | 12% |
| | 24 | Friends / Other People | 7% |
| | 25 | Other sources | 3% |
| | 26 | Do Not Receive Information about City | 2% |
| | 98 | Not sure | 3% |
| | 99 | Prefer not to answer | 1% |

| | | | | | | |
|-----|---|--|------|-------------|------------|----------------------|
| Q24 | In the past year, have you visited one or more of the websites maintained by the City of Lake Forest? | | | | | |
| | 1 | Yes | 71% | Ask Q25 | | |
| | 2 | No | 22% | Skip to Q26 | | |
| | 98 | Not sure/No opinion | 7% | Skip to Q26 | | |
| | 99 | Prefer not to answer | 0% | Skip to Q26 | | |
| Q25 | 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 | 24% | | | |
| | 2 | Somewhat satisfied | 58% | | | |
| | 3 | Somewhat dissatisfied | 10% | | | |
| | 4 | Very dissatisfied | 4% | | | |
| | 98 | Not sure | 4% | | | |
| | 99 | Prefer not to answer | 0% | | | |
| Q26 | 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 to the City? | | | | | |
| | | <i>Randomize</i> | Very | Somewhat | Not at all | Prefer not to answer |
| A | | Email | 46% | 39% | 13% | 3% |
| B | | Social Media such as Facebook | 21% | 30% | 46% | 3% |
| C | | The My Lake Forest smart phone application that allows you to communicate with the City, report issues, and receive updates | 32% | 33% | 31% | 3% |
| D | | The 'Ask Lake Forest' feature on the City's website to report issues and concerns | 24% | 47% | 26% | 3% |
| E | | Online townhall meetings | 10% | 32% | 53% | 4% |
| F | | Telephone | 24% | 32% | 41% | 3% |
| G | | Tours, workshops and In-person meetings | 6% | 29% | 59% | 5% |
| H | | Letters sent using traditional mail | 12% | 24% | 60% | 3% |

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 | 55% |
| 2 | Employed part-time | 9% |
| 3 | Student | 3% |
| 4 | Homemaker | 5% |
| 5 | Retired | 19% |
| 6 | In-between jobs | 5% |
| 98 | Not sure | 0% |
| 99 | Prefer not to answer | 3% |

D2 Do you currently have any children under the age of 18 living in your home?

| | | |
|----|----------------------|-----|
| 1 | Yes | 34% |
| 2 | No | 63% |
| 99 | Prefer not to answer | 3% |

D3 Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?

| | | |
|----|----------------------|-----|
| 1 | Yes | 73% |
| 2 | No | 24% |
| 99 | Prefer not to answer | 3% |

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 | 7% |
| 2 | \$40,000 to \$59,999 | 12% |
| 3 | \$60,000 to \$79,999 | 10% |
| 4 | \$80,000 to \$99,999 | 11% |
| 5 | \$100,000 to \$149,999 | 16% |
| 6 | \$150,000 or more | 33% |
| 98 | Not sure | 2% |
| 99 | Prefer not to answer | 10% |

Thank you for participating! This survey was conducted for the City of Lake Forest.

| Section 11: Post-Interview & Sample Items | | |
|---|--------------|-------------------------|
| D5 | Gender | |
| | 1 | Male 48% |
| | 2 | Female 47% |
| | 3 | Prefer not to answer 4% |
| S1 | Party | |
| | 1 | Democrat 33% |
| | 2 | Republican 38% |
| | 3 | Other 6% |
| | 4 | DTS 23% |
| S2 | Age | |
| | 1 | 18 to 29 18% |
| | 2 | 30 to 39 17% |
| | 3 | 40 to 49 16% |
| | 4 | 50 to 64 28% |
| | 5 | 65 or older 22% |
| S3 | Home Owner | |
| | Yes | 64% |
| | No | 36% |
| S4 | Area of City | |
| | 1 | One 20% |
| | 2 | Two 20% |
| | 3 | Three 35% |
| | 4 | Four 24% |



City of Lake Forest
Business Survey
Final Toplines (n=200)
February 2021

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 | 35% |
| | 2 | 5 years to less than 10 years | 19% |
| | 3 | 10 years to less than 15 years | 10% |
| | 4 | 15 or more years | 35% |
| | 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 | 34% |
| | 2 | Good | 41% |
| | 3 | Fair | 13% |
| | 4 | Poor | 2% |
| | 5 | Very poor | 1% |
| | 98 | Not sure | 7% |
| | 99 | Prefer not to answer | 2% |

| 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 | 34% |
| | No changes / Everything is fine | 27% |
| | Promote, advertise local businesses | 5% |
| | Reduce taxes, fees | 4% |
| | More business-friendly government | 4% |
| | Improve traffic | 4% |
| | Resolve homeless, housing problem | 4% |
| | COVID-related concerns, help for businesses | 4% |
| | Increase biz, networking opportunities | 3% |
| | Improve safety, security of biz areas | 2% |
| | Improve City appearance, maintenance | 2% |
| | Improve, add parking / Address parking issues | 1% |
| | Reduce signage restrictions | 1% |
| | Repair, maintain roads | 1% |
| | Reduce rent, lease fees to decrease vacancies | 1% |
| | Provide more incentives to attract businesses | 1% |
| | Provide additional community events | 1% |
| | Limit growth | 1% |
| | Improve Internet around city | 1% |
| Q4 | Is there a particular aspect or feature of Lake Forest that is beneficial 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 | 51% |
| | Good location / Convenient access for customers | 13% |
| | Access to other local business, services | 6% |
| | No business license / Ease of startup | 5% |
| | Access to roads, freeways, surrounding communities | 5% |
| | Growth in business, residential areas | 4% |
| | Public safety, low crime rate | 3% |
| | Cleanliness, beauty of City | 3% |
| | Good balance, mixture of residential and businesses | 3% |
| | Parks and recreational areas | 2% |

| | | |
|----|---|-----|
| | Higher end clients, higher income families | 2% |
| | Sense of community / Family-oriented City | 1% |
| | Environment, climate, weather | 1% |
| Q5 | Are there any particular challenges 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 | 79% |
| | COVID-19 effects on businesses | 4% |
| | Traffic, parking issues | 3% |
| | High expenses, rents fees | 2% |
| | Illegal immigrant issue | 2% |
| | Safety of area, homelessness | 2% |
| | Lack of support from City | 2% |
| | Other (unique responses) | 2% |
| | Location, accessibility | 1% |
| | Advertisement restrictions | 1% |
| | Business competition | 1% |
| | Improving sales, attracting more customers | 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 | 58% |
| | 2 Somewhat satisfied | 33% |
| | 3 Somewhat dissatisfied | 3% |
| | 4 Very dissatisfied | 1% |
| | 98 Not sure | 4% |
| | 99 Prefer not to answer | 1% |

| | | | | | | | |
|------------------|--|---|--------------------|-----------------------|-------------------|----------|----------------------|
| 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 | 15% | 30% | 29% | 16% | 5% | 5% |
| B | Investigating criminal activity | 39% | 40% | 10% | 9% | 2% | 0% |
| C | Enforcing traffic laws | 23% | 36% | 22% | 18% | 1% | 0% |
| D | Maintaining a low crime rate | 53% | 39% | 5% | 3% | 0% | 0% |
| E | Providing building permit services | 18% | 31% | 26% | 21% | 3% | 1% |
| F | Providing building inspection services | 15% | 25% | 28% | 28% | 2% | 1% |
| G | Promoting economic development | 26% | 46% | 19% | 7% | 1% | 1% |
| H | Revitalizing out-dated areas in the City | 20% | 42% | 22% | 12% | 1% | 2% |
| I | Providing business education events | 12% | 24% | 39% | 23% | 3% | 0% |
| J | Providing business networking events | 17% | 29% | 31% | 22% | 1% | 1% |
| K | Providing free business consulting services | 18% | 27% | 27% | 26% | 1% | 0% |
| L | Providing hiring or employee training services | 13% | 18% | 29% | 34% | 4% | 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 | 22% | 30% | 7% | 1% | 39% | 2% |
| B | Investigate criminal activity | 37% | 32% | 6% | 2% | 22% | 0% |
| C | Enforce traffic laws | 45% | 32% | 5% | 2% | 17% | 0% |
| D | Maintain a low crime rate | 48% | 33% | 4% | 3% | 12% | 0% |
| E | Provide building permit services | 33% | 28% | 1% | 1% | 33% | 3% |
| F | Provide building inspection services | 27% | 32% | 5% | 1% | 32% | 3% |
| G | Promote economic development | 34% | 33% | 5% | 2% | 25% | 1% |

| | | | | | | | |
|------------------|---|---------------------|--------------------|-----------------------|-------------------|----------|----------------------|
| H | Revitalize out-dated areas in the City | 27% | 40% | 4% | 2% | 25% | 1% |
| I | Provide business education events | 23% | 34% | 4% | 1% | 37% | 3% |
| J | Provide business networking events | 24% | 33% | 7% | 1% | 33% | 2% |
| K | Provide free business consulting services | 22% | 27% | 4% | 2% | 42% | 3% |
| L | Provide hiring or employee training services | 19% | 27% | 7% | 1% | 44% | 3% |
| 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 | 22% | 32% | 26% | 18% | 1% | 0% |
| B | Enforcing sign regulations | 17% | 30% | 30% | 19% | 4% | 0% |
| C | Street sweeping | 29% | 35% | 27% | 8% | 1% | 0% |
| D | Reducing traffic congestion | 27% | 41% | 20% | 11% | 0% | 0% |
| E | Maintaining local streets and roads | 39% | 44% | 10% | 5% | 1% | 0% |
| F | Landscaping median strips and other areas of the City | 26% | 40% | 23% | 10% | 1% | 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 | 32% | 32% | 3% | 2% | 30% | 1% |
| B | Enforce sign regulations | 32% | 32% | 4% | 1% | 30% | 1% |
| C | Provide street sweeping services | 46% | 37% | 5% | 1% | 11% | 1% |
| D | Reduce traffic congestion | 29% | 43% | 9% | 5% | 13% | 1% |
| E | Maintain local streets and roads | 44% | 46% | 2% | 2% | 5% | 1% |
| F | Landscape median strips and other areas of the City | 47% | 36% | 2% | 1% | 13% | 1% |

Section 4: CCA Electricity Program

| | | | | | | | | | |
|--|--|----------------------------|--|------------------|----------------------|----------------------|------------------|----------|----------------------|
| <p>The City of Lake Forest is considering offering electricity services directly to residents and businesses in the near future. Under this potential new program, businesses will have the option to purchase electricity from the City or continue to purchase electricity from Southern California Edison.</p> | | | | | | | | | |
| <p>Q11 As I read several features of the City's electricity program, I'd like to know how they may impact your likelihood of purchasing your electricity from the City.</p> <p>Here is the (first/next) one: _____. Would this make your business more or less likely to purchase electricity from the City? <i>Get answer, then ask:</i> Would that be much (more/less) likely or somewhat (more/less) likely?</p> | | | | | | | | | |
| | <i>Randomize</i> | | | Much more likely | Somewhat more likely | Somewhat less likely | Much less likely | Not Sure | Prefer not to answer |
| A | The rates charged would be lower | | | 64% | 20% | 3% | 4% | 9% | 1% |
| B | The rates charged would be more stable over time | | | 43% | 32% | 5% | 4% | 11% | 4% |
| C | A greater amount of the electricity would be produced through renewable sources like solar, wind and biomass | | | 42% | 29% | 6% | 7% | 13% | 4% |
| D | There would be local control over the type of electricity offered | | | 38% | 30% | 8% | 7% | 14% | 3% |
| <p>Q12 If the cost of electricity were the same, who would you prefer to be your electricity provider: _____ OR _____? <i>Randomize Order.</i></p> | | | | | | | | | |
| | 1 | The City of Lake Forest | | | 36% | | | | |
| | 2 | Southern California Edison | | | 36% | | | | |
| | 98 | Not sure | | | 26% | | | | |
| | 99 | Prefer not to answer | | | 2% | | | | |

Section 5: City-Business Communication

| | | | | |
|--|----|-----------------------|-----|-------------|
| <p>Q13 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)?</p> | | | | |
| | 1 | Very satisfied | 43% | Skip to Q15 |
| | 2 | Somewhat satisfied | 41% | Skip to Q15 |
| | 3 | Somewhat dissatisfied | 5% | Ask Q14 |
| | 4 | Very dissatisfied | 4% | Ask Q14 |
| | 98 | Not sure | 7% | Skip to Q15 |
| | 99 | Prefer not to answer | 1% | Skip to Q15 |

| | | | |
|-----|--|--|-----|
| Q14 | Is there a particular reason why you are dissatisfied with the City's efforts to communicate with local businesses? Verbatim responses recorded for 14 dissatisfied customers presented below. | | |
| | <i>Communication and attitude is very poor.</i> | | |
| | <i>Don't feel there is a lot of communication.</i> | | |
| | <i>Haven't see any positive communication to help local businesses. There were posts about grants. But, there's so many stipulations to be approved, I can't get financial assistance. Neither can other small local businesses.</i> | | |
| | <i>I don't even know that they will communicate with businesses. Actually, this is the first that I am getting a phone call for a survey about businesses in the City.</i> | | |
| | <i>I haven't heard anything from the city.</i> | | |
| | <i>I just haven't received any correspondence.</i> | | |
| | <i>Because you are parroting COVID propaganda and your liberal agenda.</i> | | |
| | <i>I'm not sure where to look.</i> | | |
| | <i>Never hear any efforts to communicate!</i> | | |
| | <i>The information isn't the easiest to find.</i> | | |
| | <i>There is not such program I think.</i> | | |
| | <i>They could increase or offer other means.</i> | | |
| | <i>We never receive anything.</i> | | |
| | <i>What communication is there?</i> | | |
| Q15 | 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. | | |
| | <i>If they say Internet or web, probe to see if a City website and - if yes - which one.</i> | | |
| | City Sources | | |
| | 1 | The Leaflet - City Newsletter | 29% |
| | 2 | Leisure Times - included in the Leaflet | 3% |
| | 3 | City Newsletter - no mention of Leaflet or Leisure Times | 11% |
| | 4 | E-newsletter - electronic newsletter | 14% |
| | 5 | City Council Meetings | 2% |
| | 6 | Lake Forest Shop & Dine App | 1% |
| | 7 | My Lake Forest Smartphone App | 1% |
| | 8 | Text Messages from City/Nixle | 4% |
| | 9 | City of Lake Forest Alexa Skill | 0% |
| | 10 | City Website (not specific) | 14% |
| | 11 | Skatepark site (Etnies) | 0% |
| | 12 | Main City Web Page | 7% |
| | 13 | Economic Development Website | 0% |
| | 14 | Flyers at City Facilities | 3% |

| Newspaper, Radio, & TV | | | | | | |
|-------------------------|--|---|------|----------|------------|---------------------------------|
| | 15 | Saddleback Valley News (paper) | | | 3% | |
| | 16 | Orange County Register (paper) | | | 9% | |
| | 17 | Los Angeles Times (paper) | | | 2% | |
| | 18 | Radio | | | 2% | |
| | 19 | Television | | | 3% | |
| Internet & Social Media | | | | | | |
| | 20 | Internet, not a City site | | | 14% | |
| | 21 | Social Media like Facebook, Twitter and Instagram | | | 14% | |
| | 22 | Lake Forest Patch - the Patch | | | 4% | |
| | 23 | Nextdoor | | | 2% | |
| | 24 | Friends / Other People | | | 2% | |
| | 25 | Other | | | 6% | |
| | 26 | Do Not Receive Information about City | | | 5% | |
| | 98 | Not sure | | | 4% | |
| | 99 | Prefer not to answer | | | 1% | |
| Q16 | 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 | Email | | 61% | 25% | 10% | 4% |
| B | Electronic Newsletters | | 52% | 35% | 9% | 4% |
| C | Twitter | | 13% | 24% | 53% | 10% |
| D | Facebook | | 28% | 31% | 34% | 7% |
| E | The My Lake Forest smart phone application that allows you to communicate with the City, report issues, and receive updates | | 37% | 31% | 20% | 12% |
| F | City website | | 51% | 33% | 11% | 5% |
| G | A Blog on the City's website | | 31% | 34% | 28% | 7% |
| H | Newsletters and other materials mailed directly to your business | | 39% | 36% | 19% | 6% |
| I | Automated phone calls | | 13% | 28% | 51% | 8% |
| J | Town hall and community meetings | | 24% | 44% | 27% | 5% |
| K | Advertisements in local papers | | 9% | 32% | 52% | 7% |
| L | Public Access Television | | 12% | 25% | 54% | 8% |

| | | | | | | |
|-----|--|----------------------|-----------------|---------------------|----------------|---------------------------------|
| Q17 | Have you ever visited the City's economic development website at www.lakeforestbusiness.com ? | | | | | |
| | 1 | Yes | 42% | | | |
| | 2 | No | 54% | | | |
| | 99 | Prefer not to answer | 4% | | | |
| Q18 | The City of Lake Forest 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 | | 19% | 28% | 49% | 4% |
| B | Understanding business finance | | 19% | 31% | 45% | 4% |
| C | Business job fair and expo | | 23% | 32% | 42% | 4% |
| D | Payroll and tax reporting requirements | | 18% | 30% | 47% | 5% |
| E | Business marketing and sales | | 27% | 36% | 33% | 4% |
| F | Business legal issues | | 25% | 38% | 33% | 4% |
| G | Business networking events | | 32% | 35% | 30% | 3% |
| H | Roundtable discussion on specific topics | | 18% | 34% | 44% | 5% |
| I | Social Media and Marketing | | 27% | 33% | 36% | 4% |
| J | Importing and Exporting | | 15% | 17% | 63% | 5% |

Section 6: 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 | 26% |
| | 2 to 5 | 33% |
| | 6 to 10 | 13% |
| | More than 10 | 23% |
| | Prefer not to answer | 5% |

| | | | | |
|----|---|---|-----|------------|
| D2 | Approximately how many of these employees live outside of Lake Forest? | | | |
| | None | | 27% | |
| | 1 | | 9% | |
| | 2 to 5 | | 30% | |
| | 6 to 10 | | 10% | |
| | More than 10 | | 16% | |
| | 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 | 7% | |
| | 2 | Quality business parks | 1% | |
| | 3 | Proximity to freeways/transportation corridors | 7% | |
| | 4 | Quality of housing stock | 0% | |
| | 5 | Overall quality of the City | 11% | |
| | 6 | Local amenities (dining/shopping) | 0% | |
| | 7 | Close to clients/customers | 4% | |
| | 8 | Close to owner's home | 25% | |
| | 9 | Streamlined processes to locate or expand a business in Lake Forest | 4% | |
| | 10 | Location/accessibility | 21% | |
| | 12 | Other | 12% | |
| | 98 | Not sure | 7% | |
| | 99 | Prefer not to answer | 3% | |
| D4 | In the next 12 months, do you think your business will increase, decrease or stay about the same? | | | |
| | 1 | Increase | 46% | Ask D5 |
| | 2 | Decrease | 8% | Skip to D6 |
| | 3 | Stay about the same | 35% | Skip to D6 |
| | 98 | Not sure | 10% | 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 | 17% | |
| | 2 | No | 75% | |
| | 98 | Not sure | 6% | |
| | 99 | Prefer not to answer | 2% | |
| D6 | In the next 12 months, do you think your business will relocate? | | | |
| | 1 | Yes | 10% | Ask D7 |
| | 2 | No | 78% | Skip to D9 |
| | 98 | Not sure | 8% | Skip to D9 |
| | 99 | Prefer not to answer | 4% | Skip to D9 |
| D7 | Will you be relocating your business within Lake Forest or to another community? | | | |
| | 1 | Lake Forest | 31% | Skip to D9 |
| | 2 | Another community | 48% | Ask D8 |
| | 98 | Not sure | 21% | 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 10 respondents on file | |
| D9 | Last question for you. Are you a resident of Lake Forest? | | | |
| | 1 | Yes | 43% | |
| | 2 | No | 55% | |
| | 99 | Prefer not to answer | 2% | |
| Thank you for participating! This survey was conducted for the City of Lake Forest. | | | | |

Section 7: Post-Interview & Sample Items

| | | | |
|----|--------|----------------------|-----|
| S1 | Gender | | |
| | 1 | Male | 64% |
| | 2 | Female | 34% |
| | 99 | Prefer not to answer | 2% |

| S2 | Home-Based Business | | |
|----|---------------------|-----|-----|
| | 1 | Yes | 26% |
| | 2 | No | 74% |